



Longwoods
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40 YEARS TOGETHER

Oklahoma 2018 Advertising ROI and Image Research

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Background and Purpose

- ✓ In early 2018, Oklahoma launched a new advertising campaign in key in-state and out-of-state markets.
 - ✓ The campaign consisted of both traditional and online media including:
 - ✓ Digital ads
 - ✓ Digital and cable video
 - ✓ Print ads
 - ✓ Social media ads
- ✓ Longwoods was engaged to conduct a program of research designed to:
 - ✓ Measure the effectiveness of the advertising campaign in bringing visitors to Oklahoma during the campaign period and shortly thereafter, and increasing intentions to visit in the future.
 - ✓ Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Oklahoma by those visitors, and incremental taxes generated by that spending.
 - ✓ Through an analysis of Oklahoma's image, provide input into the development of positioning and messaging for future campaigns.

Research Objectives

- ✓ The objectives of the research were to measure:
 - ✓ Awareness of Oklahoma as a desirable vacation destination.
 - ✓ Awareness of Oklahoma's advertising activity, i.e., individual advertising elements.
 - ✓ Impact of Oklahoma's advertising on:
 - ✓ Oklahoma's image
 - ✓ Actual visits to Oklahoma during and shortly after the campaign period
 - ✓ Carry-over impacts: anticipated trips planned in the next 2 years as a result of the campaign
 - ✓ The relative importance of image factors in getting on the destination wish list.
 - ✓ Impact of Oklahoma's advertising on conversion and intentions to visit by media combinations and markets.

Method

- ✓ A benchmark study was conducted after the conclusion of the advertising period to measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit and image, and measure short-term conversion that occurred during and shortly after the campaign period.

- ✓ A national self-completion survey of 1,400 respondents in the advertising markets, distributed as follows:

Oklahoma (State)	160	Dallas-Ft. Worth DMA	225
Amarillo, TX DMA	50	Austin DMA	90
San Antonio DMA	110	Wichita Falls DMA	50
Ft. Smith-Fayetteville-Springdale-Rodgers DMA	50	Little Rock-Pine Bluff DMA	95
Kansas City DMA	110	Springfield, MO DMA	50
St. Louis DMA	150	Wichita DMA	50
Houston DMA	160	Shreveport DMA	50

- ✓ Respondents are members of a major online consumer research panel.
- ✓ Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
- ✓ Sample was drawn to be proportionate to population by specific cities/regions, age, sex and income.

Method (Cont'd)

- ✓ The survey took an average of 25 minutes to complete.
- ✓ During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on attitudes towards Oklahoma and other behavioral measures.
- ✓ The fieldwork was conducted in October 2018.
- ✓ Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific DMAs.
- ✓ For a sample of this size, the confidence level is $+ / - 2.5\%$, 19 times out of 20.

Method (Cont'd)

- ✓ The estimates of the campaign's impacts on visits and intentions to visit Oklahoma are conservative in that:
 - ✓ Trips taken/intended by people in the absence of advertising are backed out.
 - ✓ Conservative control procedures help ensure that only advertising-influenced trips are included.
- ✓ Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,400 travelers).



Key Findings

Key Findings

- Visit Oklahoma's 2018 campaign in core markets generated considerable awareness:
 - Reaching almost half of the intended target audience of travelers.
 - Achieving a substantial frequency of recalled exposure with a mean of 9 exposures.
- The campaign was very successful at changing people's perceptions and overall image of Oklahoma as a travel destination, including shifts that were in areas of particular importance in driving destination selection.
- The advertising also had a positive effect on actual travel to Oklahoma:
 - Yielding over 1,162,000 incremental trips over and above the travel that would have occurred in the absence of advertising.
- This incremental travel translates into additional visitor expenditures of \$195 million.
- In the short-term, the \$2.3 million in media costs have generated an ROI of \$86 in visitor spending for each ad dollar spent.
- We would expect some additional carry-over impacts as well, since the advertising had a substantial impact on intended travel:
 - Producing 1.4 million incremental planned trips to Oklahoma.

Key Findings

- Tourism functions as the front door for economic development because, as Oklahoma continues to be successful via tourism advertising in attracting visitors, those people view Oklahoma more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire.
 - The advertising has a positive effect on image before people even arrive, which is compounded through experiencing the Oklahoma product.
- Tourism advertising can, in effect, drive the bus for economic development, because it is the most visible and most cost effective tool the region has of reaching those people who can be motivated to consider Oklahoma for relocation, business building, etc.
- The ad campaign evaluated in this research did an extremely effective job of fulfilling this role.



Main Findings: Advertising Impacts



Advertising Awareness

Advertising Awareness

- Almost half (47%) of travelers in Oklahoma's core markets recalled seeing at least one Oklahoma tourism ad among the portfolio they were exposed to in the survey. Awareness was up .04% from 2017.
- People were more likely to remember a digital (41%) or print ad (27%) than one of the TV (25%) or social media (20%) ads.
- The ads with the highest level of recall were:
 - The History and Heritage ads
 - National ads
 - Come See for Yourself ads

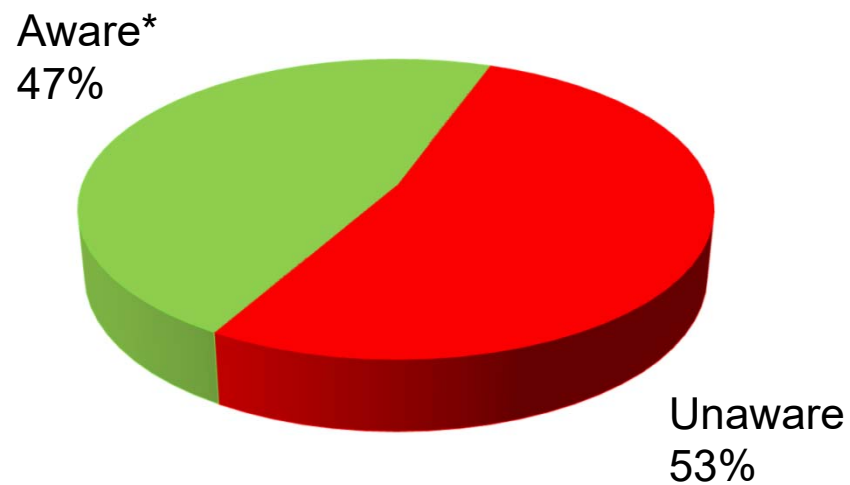
Advertising Awareness

- On average, a traveler recalled seeing a Visit Oklahoma ad on 9 occasions, which translates into approximately 166.5 million exposures over the campaign period.
- The average frequency of recall by medium follows the same pattern as awareness levels, showing highest frequency for digital ads, followed by print, TV and social ads.
- Advertising had a great influence on intent to visit Oklahoma. Travelers who recalled seeing an ad were much more likely (41% compared to 20%) to visit Oklahoma in the next 12 months.

Awareness of the Ad Campaign

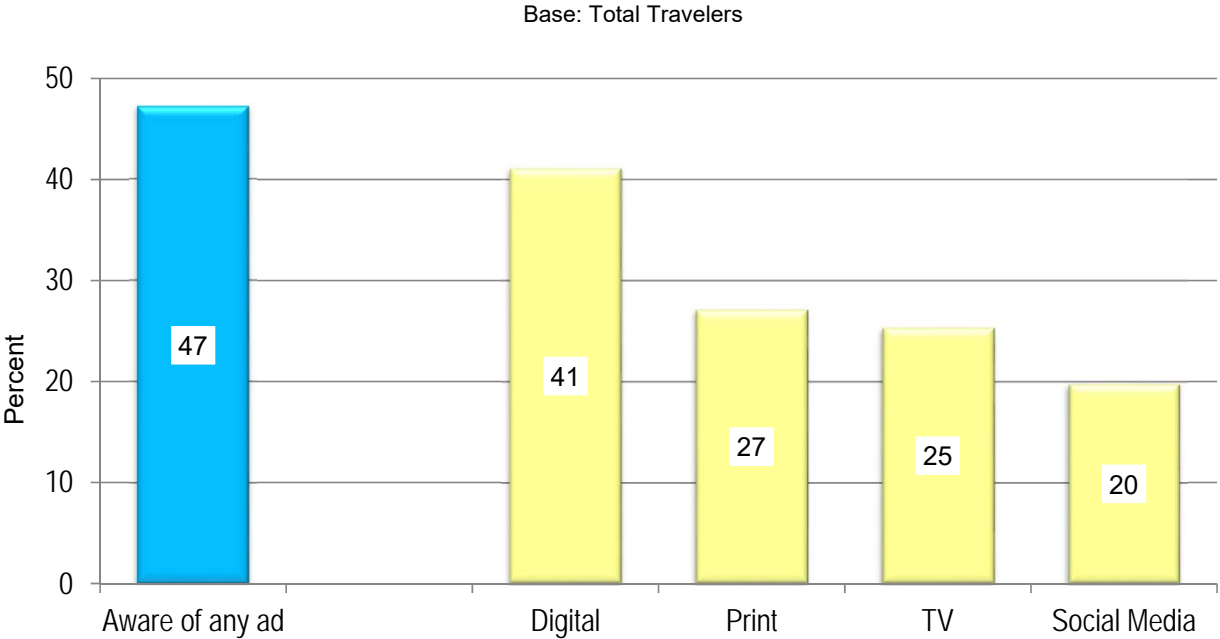
Base: Total Travelers

Awareness level is up .04% from 2017



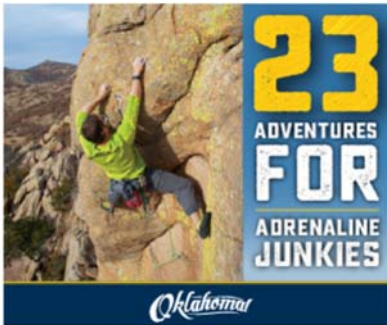
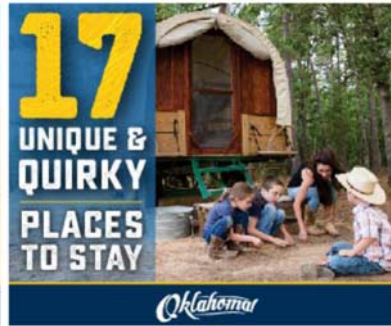
*Saw at least one ad

Advertising Awareness* by Medium



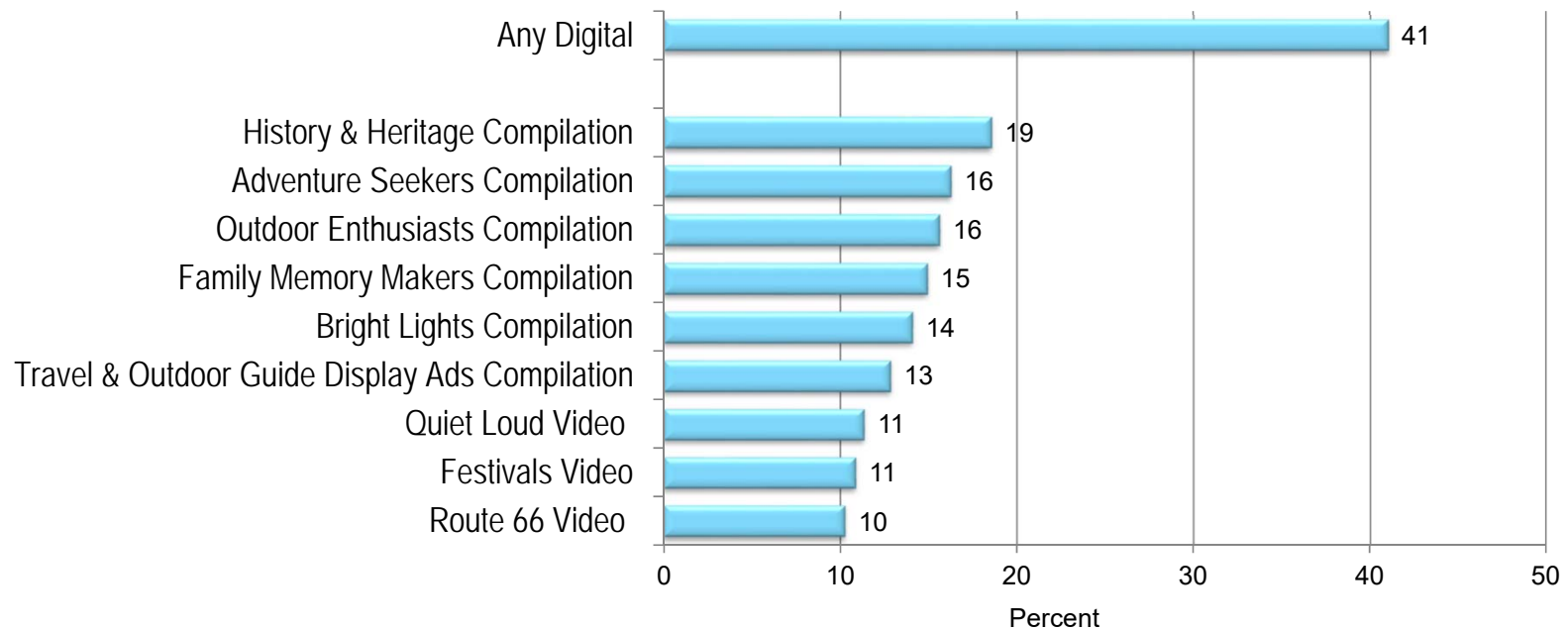
*Saw at least one ad

Digital Creative



Awareness of Individual Ads*

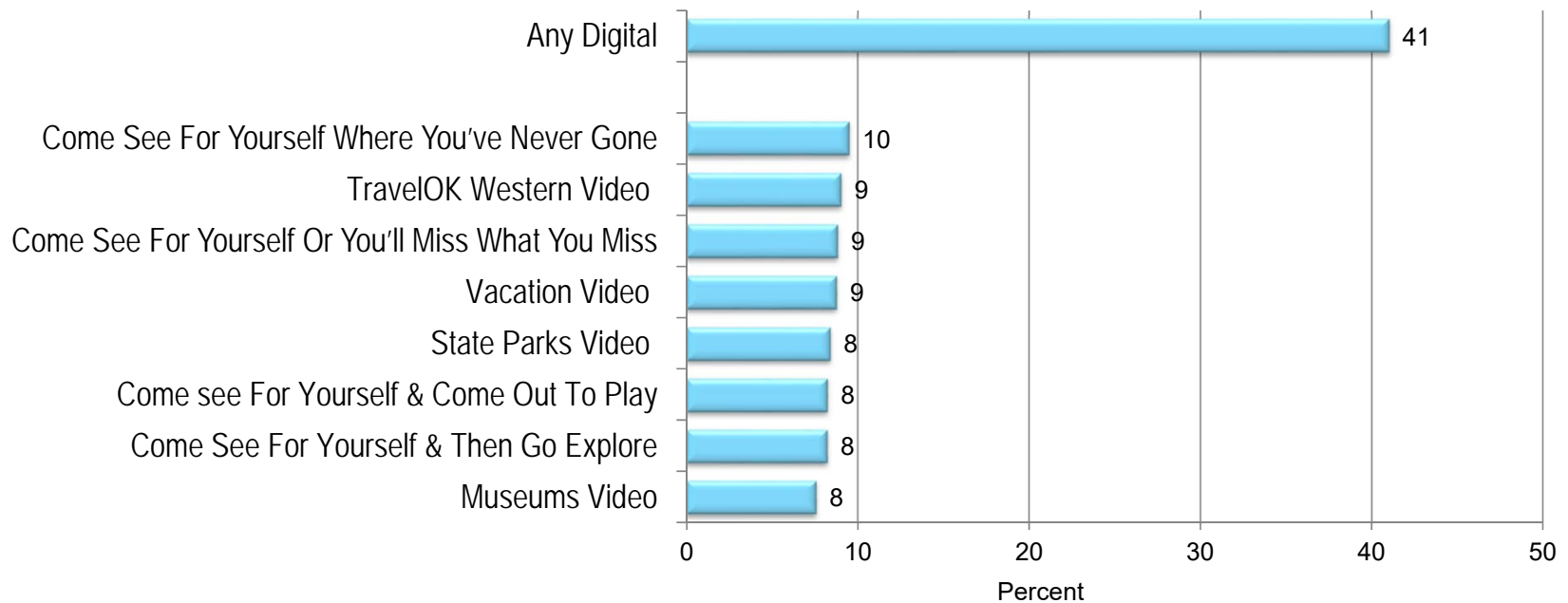
— Digital



*Based on markets where shown

Awareness of Individual Ads*

— Digital (Cont'd)



*Based on markets where shown

Print Creative



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TRAVELER.COM

**TO GET CLOSE,
GET AWAY**

RESERVE YOUR RV CAMPSITE!
Book online today at GoCampOK.com.

Follow us at Facebook.com/OKStateParks

BIG ROCK CANYON

Share unforgettable family time in rugged southwest Oklahoma. Start on the trails at Red Duck with a hike beneath colorful canyon walls. Rock climb the rugged boulder fields at Great Plains State Park. Soak in serene relaxation at Ft. Cobb State Park with a weekend of fishing and boating. Set up camp at an Oklahoma state park, and make memories you'll share forever.



OKLAHOMA STATE PARKS
TRAVELER.COM

**SADDLE UP FOR
ADVENTURE**
IN SOUTHEASTERN OKLAHOMA

9TH NIGHT FREE DEAL!
Get your 9th night free when you book three nights at a state park cabin or lodge. Book online at TravelOK.com/9thNight. *Restrictions apply. Follow us at Facebook.com/OKStateParks

WALL CROSS **WATERFALLS**

Packed with caves, hills and breathtaking scenery, southwestern Oklahoma is your destination for excitement. Start your journey at Billie's Cove, home to the legendary legend of Jesse James and Belle Star. Next, head to McGee Creek Lake for some of Oklahoma's best trophy bass fishing. Then venture to awe-inspiring Beaver's Bend State Park. Head the Mountain Fork River or explore hidden caves in your canoe. A world of exhilaration is calling in the forests and foothills of southwestern Oklahoma.



OKLAHOMA STATE PARKS
TRAVELER.COM

**LAUNCH YOUR
NEXT ADVENTURE
AT AN OKLAHOMA
STATE PARK**

9TH NIGHT FREE DEAL!
Get your 9th night free when you book three nights at a state park cabin or lodge. Book online at TravelOK.com/9thNight. *Restrictions apply. Follow us at Facebook.com/OKStateParks

LAKE HERRING

The trip of a lifetime is about to take flight at a state park near you. Start your RV or tent camping adventure at Lake Texoma State Park, then journey to Lake Murray, where the all-new lodge features water views from every room. Book your next excursion at one of Oklahoma's largest lakes, and let your heart soar.



OKLAHOMA STATE PARKS
TRAVELER.COM

**WHERE MAGIC
& MEMORIES
GO HAND-IN-HAND**

9TH NIGHT FREE DEAL!
Get your 9th night free when you book three nights at a state park cabin or lodge. Book online at TravelOK.com/9thNight. *Restrictions apply. Follow us at Facebook.com/OKStateParks

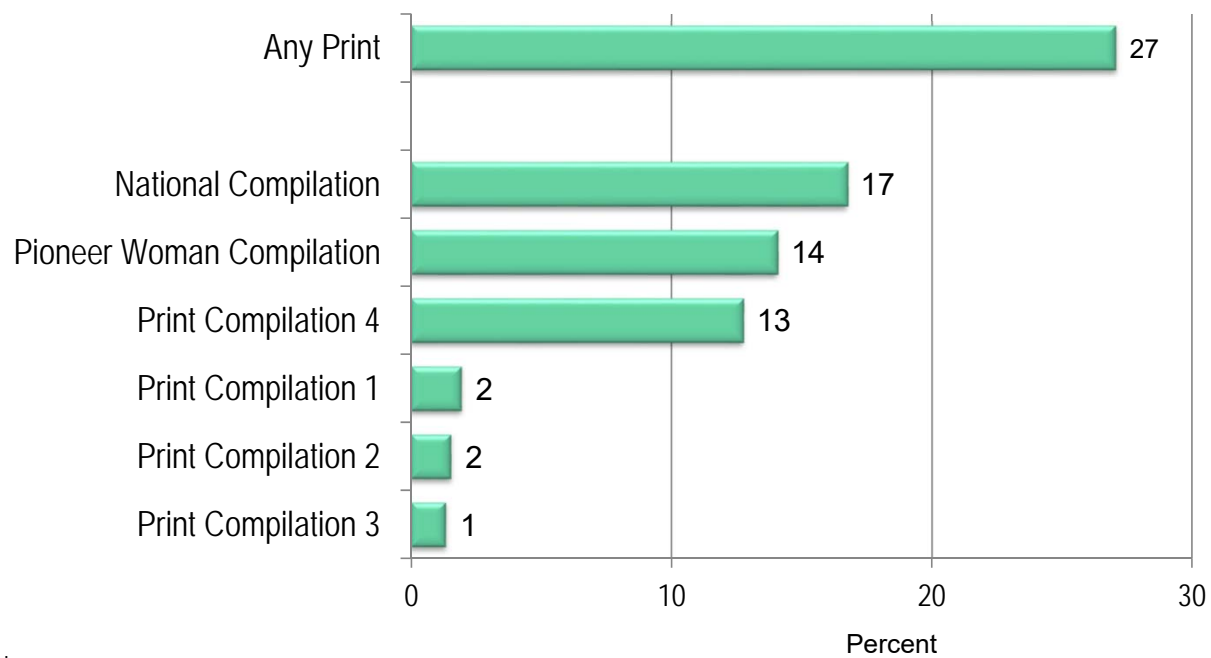
NATURAL FALLS **KEYSTONE**

Grab ahold of magical moments at an Oklahoma state park. Explore hundreds of miles of unspoiled shoreline at Sequoyah. At Natural Falls, venture from your yurt along miles of scenic trails. The cascading waterfall will leave you speechless. Head to Keystone for a day of fishing and water sports, then retire to your luxurious cabin or lodge room. Lifelong memories are within your grasp. Capture them at an Oklahoma state park.

Awareness of Individual Ads*

— Print

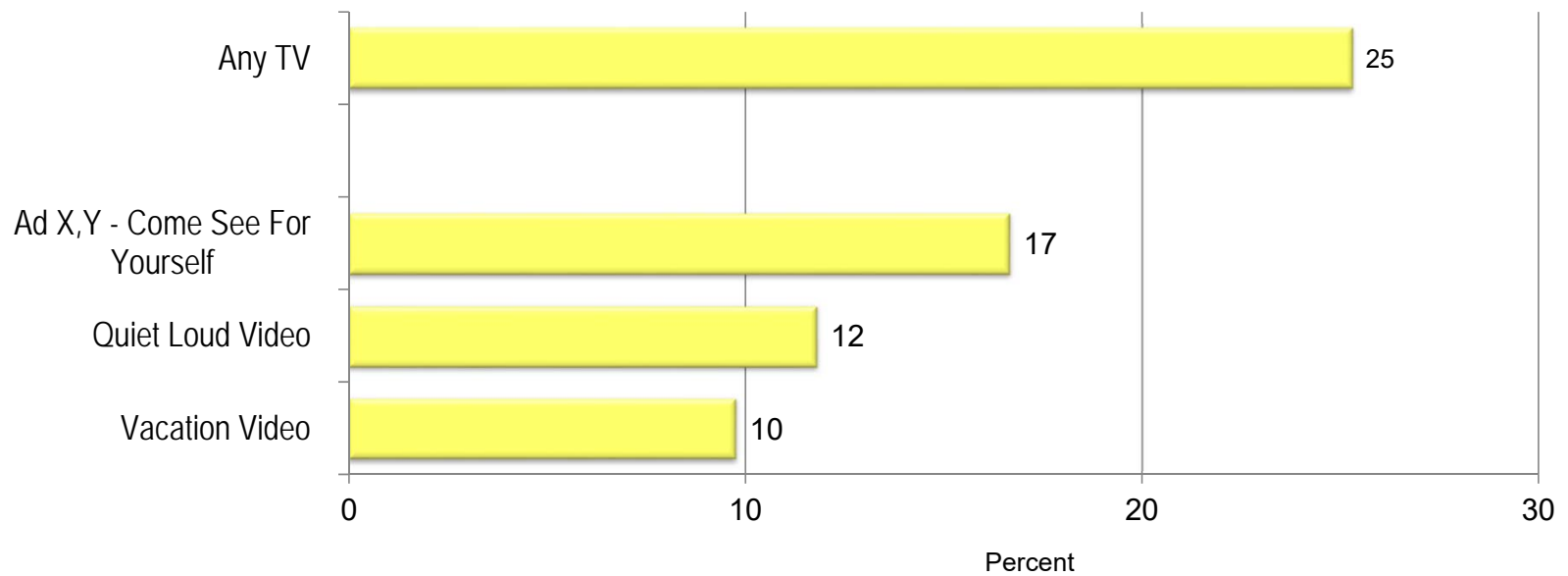
Base: Total Travelers



*Based on markets where shown

Awareness of Individual Ads*

— TV



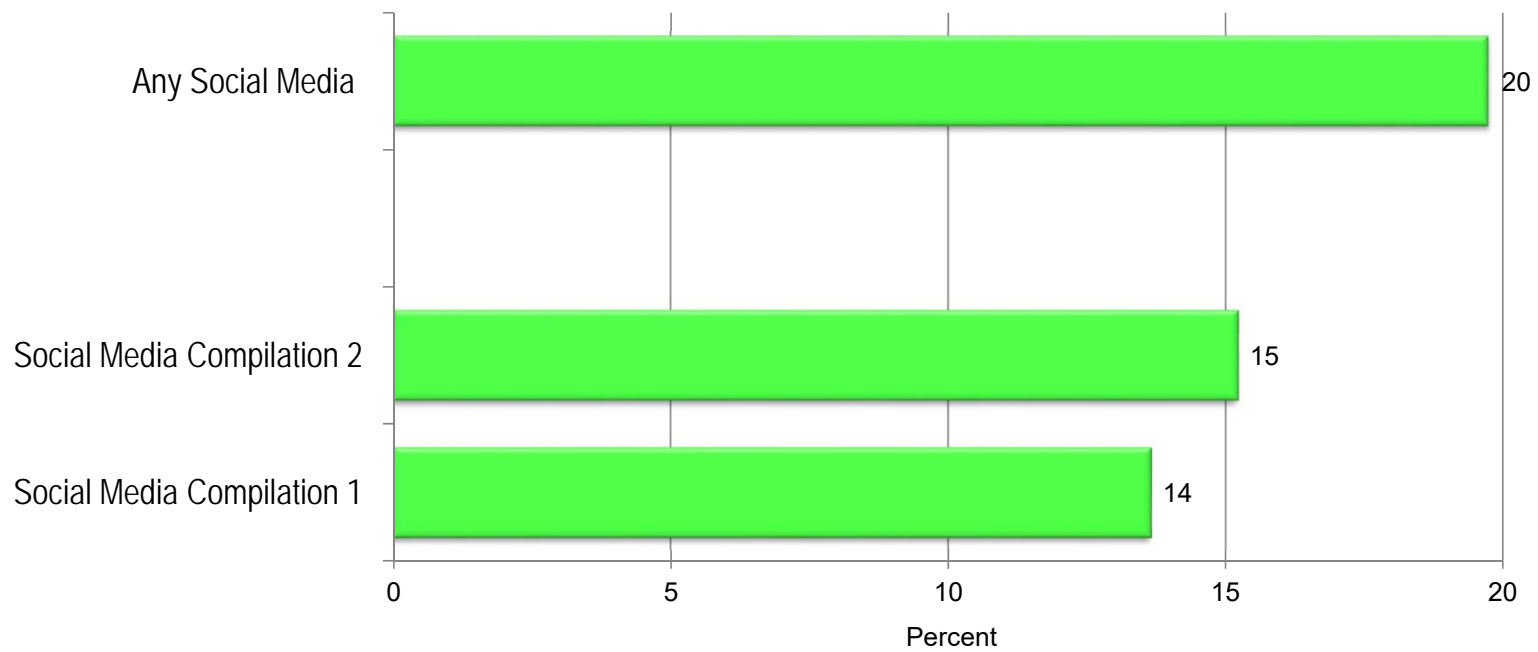
*Based on markets where shown

Social Media Creative



Awareness of Individual Ads*

— Social Media



*Based on markets where shown



**Advertising
Impact on
Short-of-Sales
Measures**

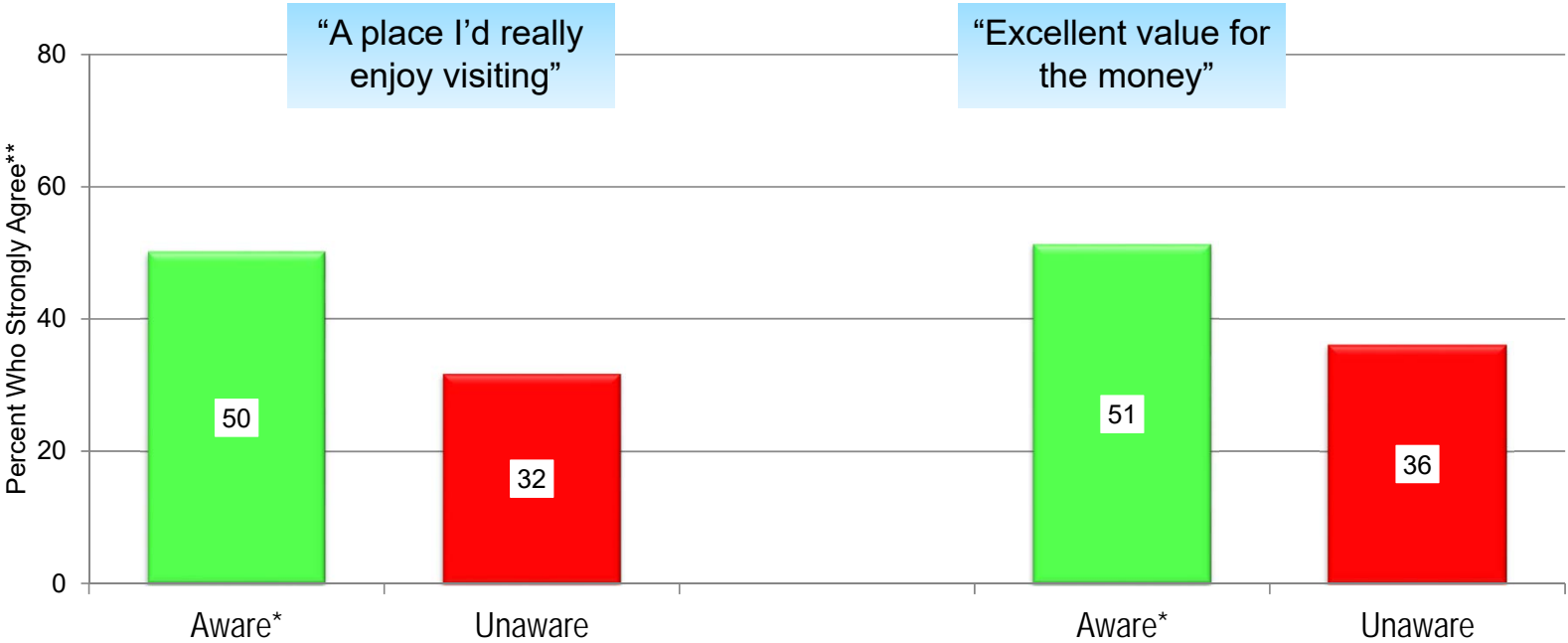
Advertising Impacts

- The campaign had a positive impact on travelers' perceptions of Oklahoma:
 - People exposed to the campaign gave Oklahoma substantially higher rating scores than those unfamiliar with the campaign for the general overall statement "Oklahoma is a place I would really enjoy visiting" and the notion that a vacation in Oklahoma provides "excellent value for the money."
 - For the more detailed attributes, we find that the campaign did a very good job of improving people's perceptions of Oklahoma for every image dimension evaluated.
 - Last year's campaign showed similar improvements with the exception of "family atmosphere," where both those exposed to and those unaware of the campaign gave Oklahoma similar and extremely high marks.

Advertising Impacts

- The advertising had greatest impact on perceptions related to:
 - Great scenery for sight seeing
 - Hotel and resorts and dining options
 - Great for an adult or couples vacation
 - Sports amenities and recreation
 - Family atmosphere
- Of these variables, being thought of as both an “adult destination” and a “a good place for families” means that Oklahoma has a lot to offer in terms of activities and types of things to do.

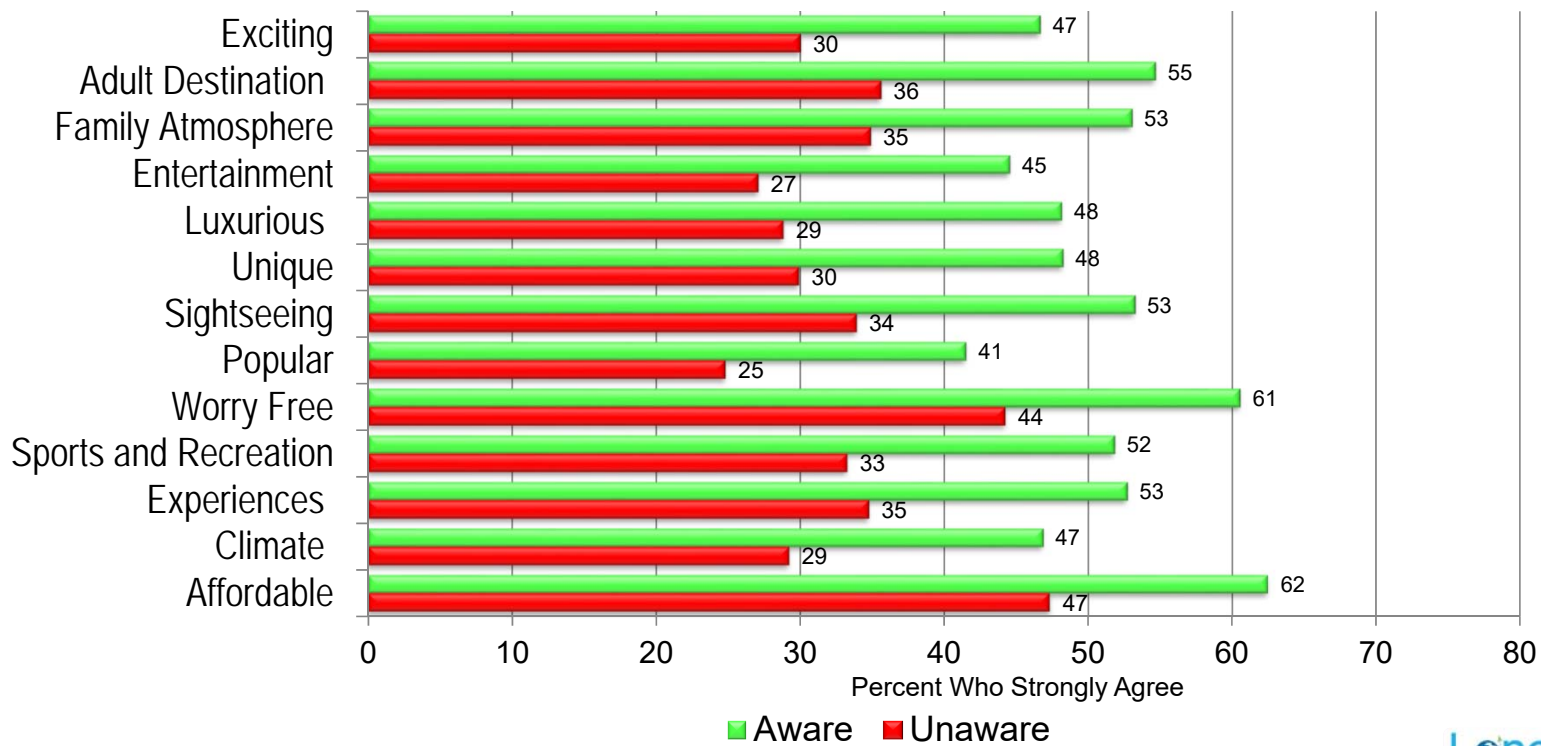
Advertising Impact on Oklahoma's Overall Image



*Saw at least one ad.

**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

2018 Advertising Impact on Oklahoma's Image



2015 Advertising Impact on Oklahoma's Image

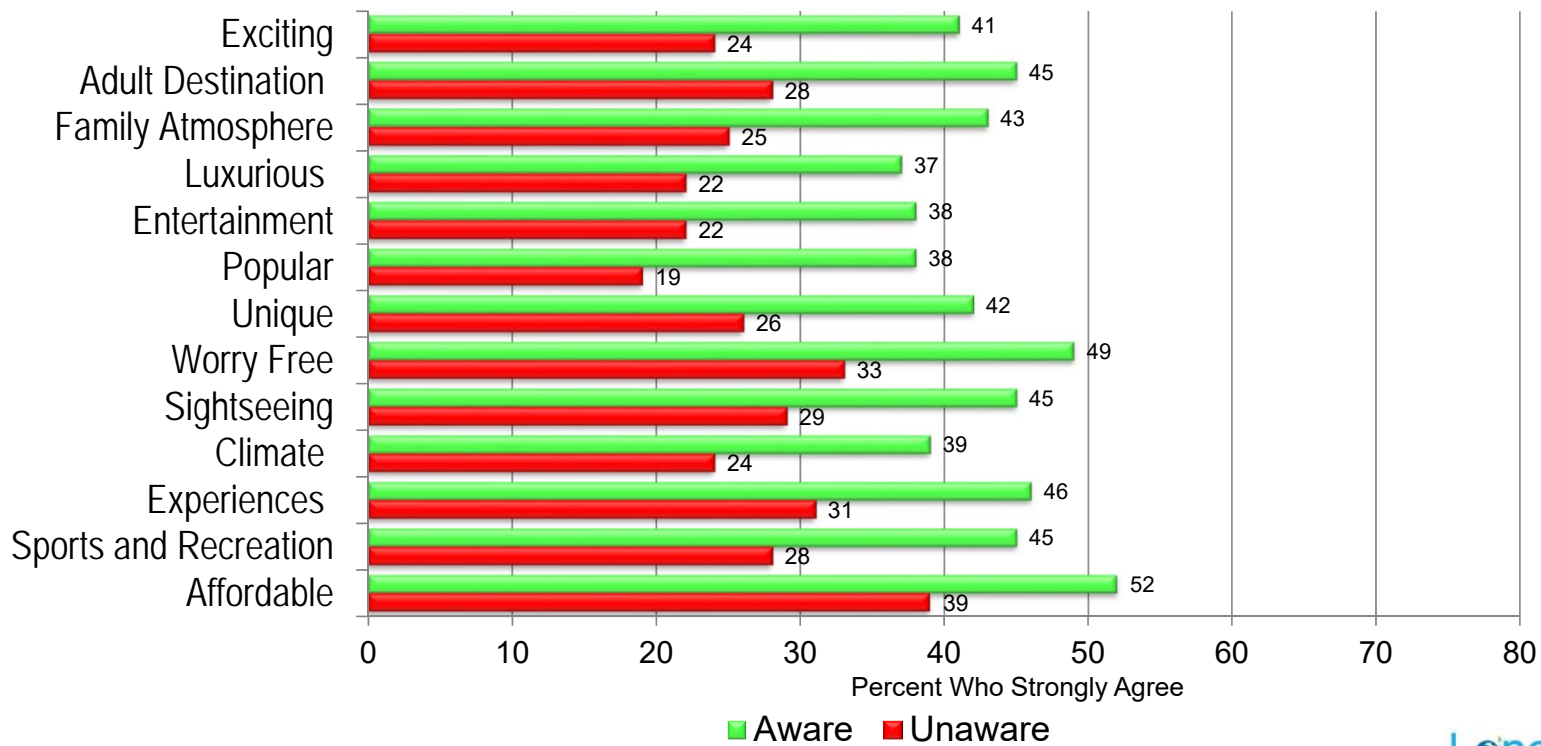
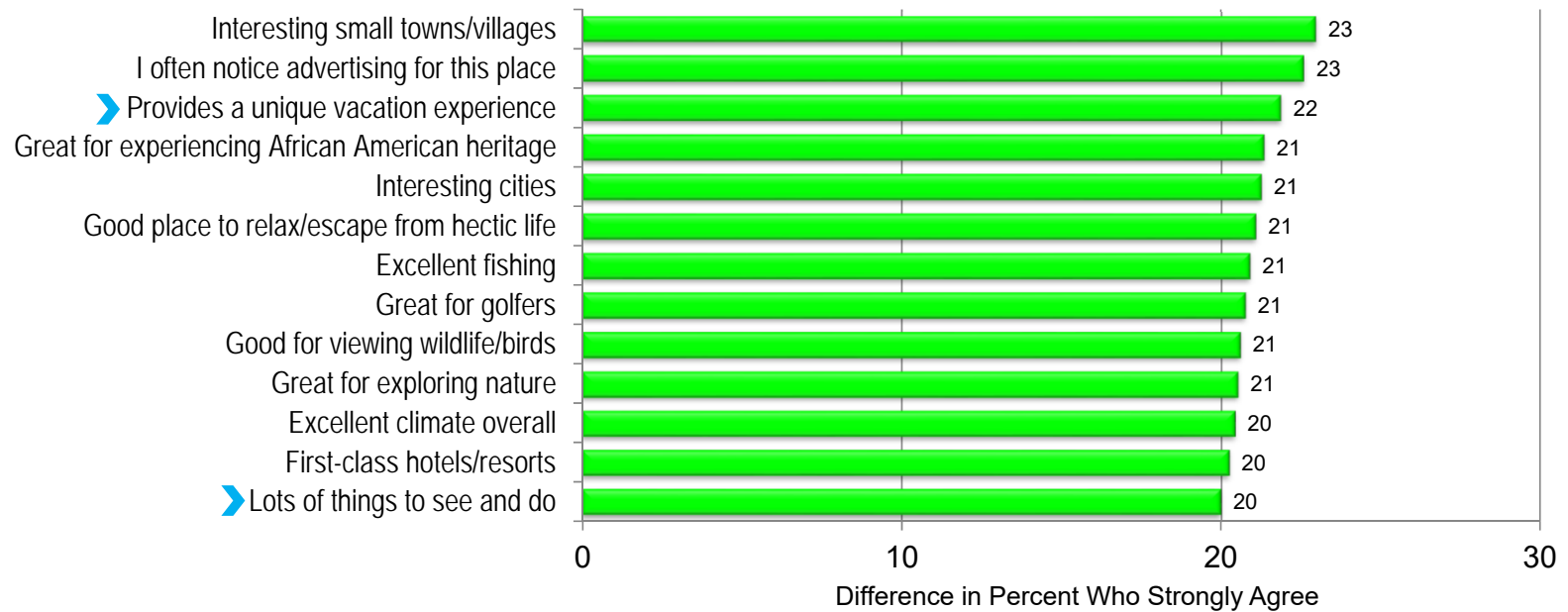
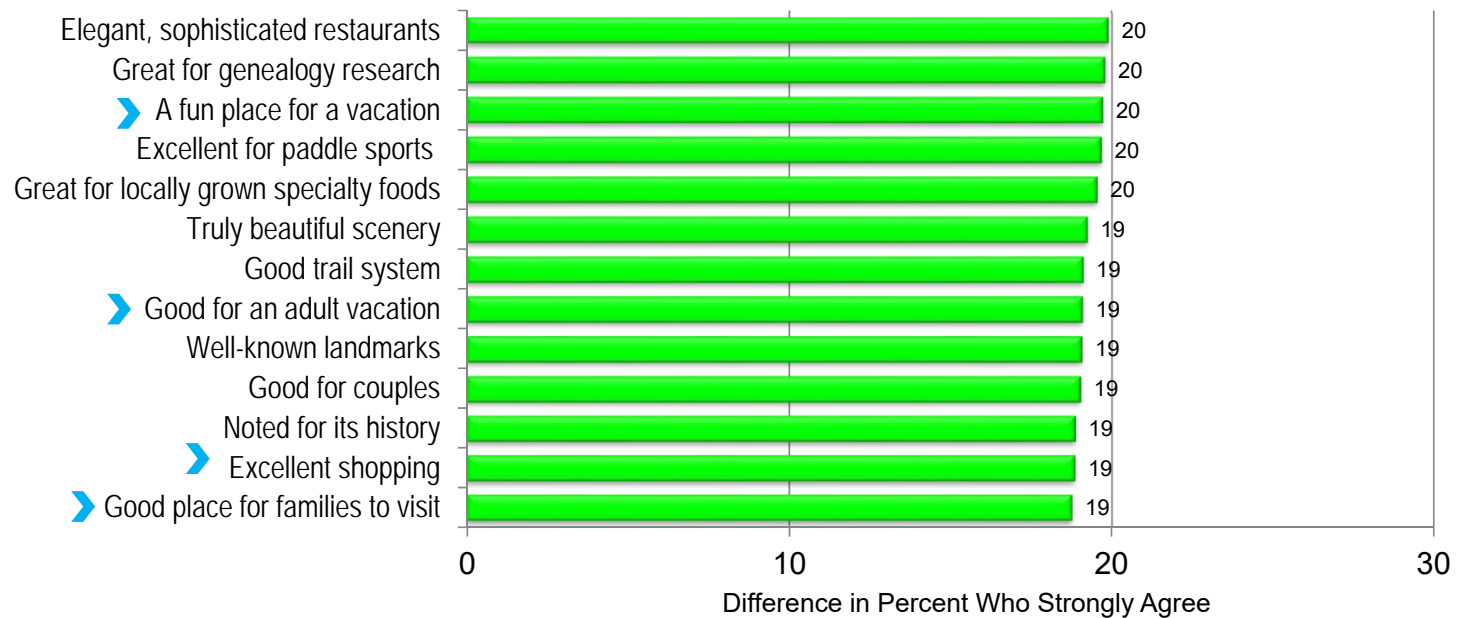


Image Attributes Most Impacted by Advertising



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)

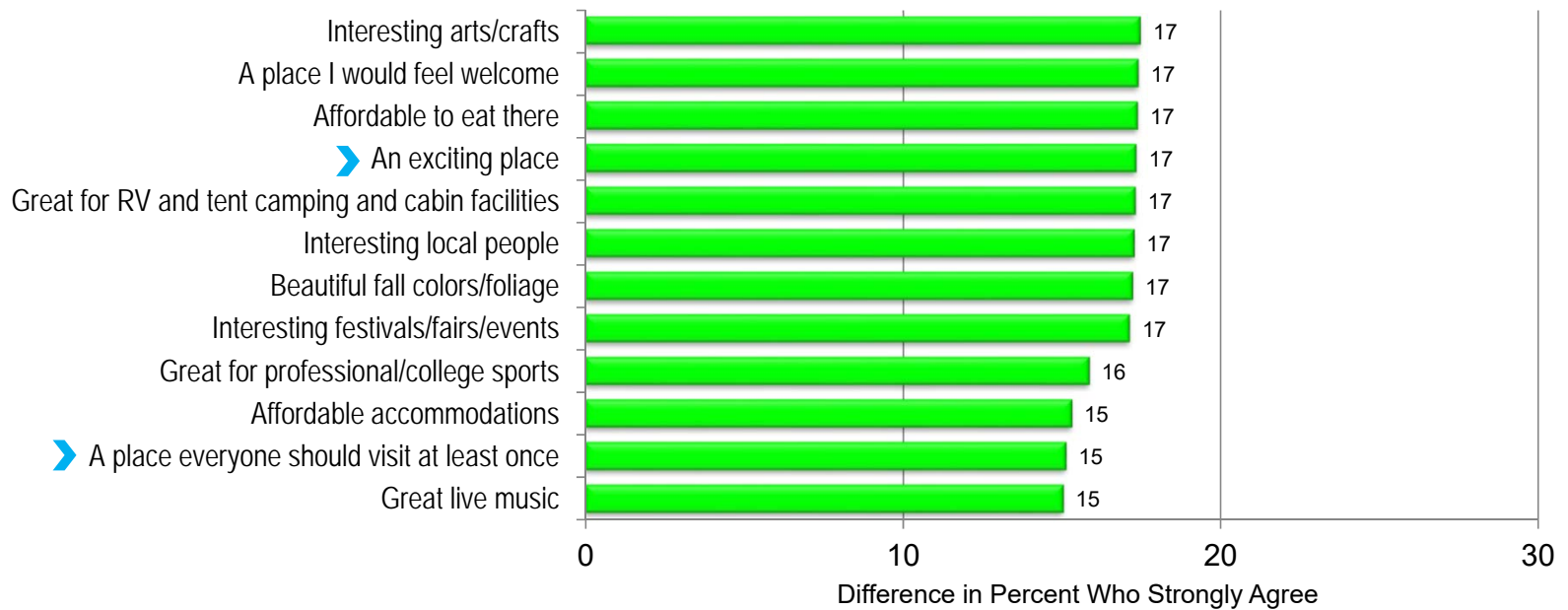


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)

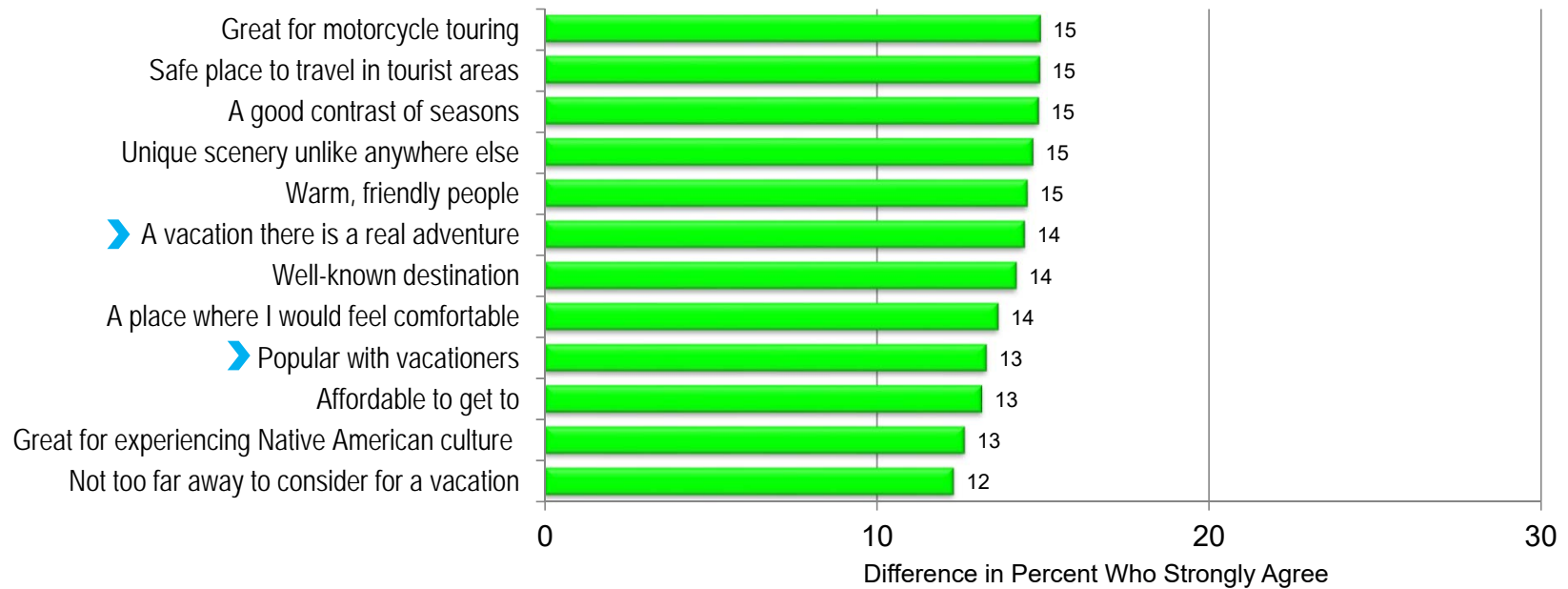


Image Attributes Most Impacted by Advertising (Cont'd)



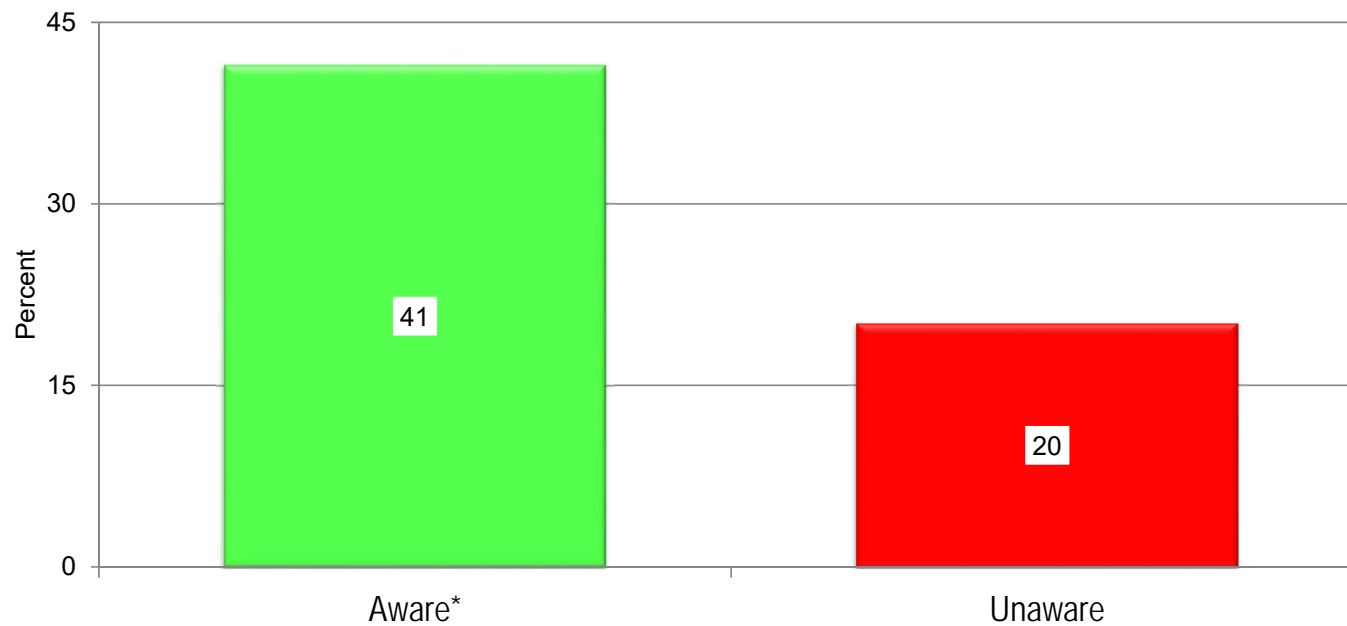
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Impact of Advertising on Intent to Visit Oklahoma in the Next Twelve Months



*Saw at least one ad.



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Short Term Conversion



Advertising Impact

- The campaign generated over 1,162,000 incremental trips that would not otherwise have taken place, which brought almost \$195.3 million in incremental visitor spending and \$15.4 million in state and local taxes.
- Every \$1 invested in the Oklahoma ad campaign in the evaluated markets generated \$86 in visitor spending and \$7 in tax revenue for the benefit of Oklahoma residents.
- It cost \$1.95 in advertising to generate each incremental trip.
- In addition to the short-term impacts, we estimate that the advertising has influenced the planning of a further 1.4 million trips to Oklahoma in 2018 and 2019. Although not all of these trips will happen, we expect that a sizeable number will convert, adding significantly to the return on Oklahoma's investment in tourism marketing.

Incremental Trips, Spending and Taxes Due to Advertising

	2015	2016	2017	2018
Ad Investment	\$2.2M	\$2.3M	\$ 1.8M	\$2.3M
Incremental Trips	1,222,257	1,422,071	917,519	1,162,337
Incremental Visitor Spending*	\$204.6M	\$210.0M	\$ 135.9M	\$195.3
Incremental Taxes**	\$15.5M	\$16.6M	\$ 10.7M	\$15.4

*Spending is based on \$208.40 per person for overnight trips and \$66.95 per person for day trips in 2017

** Based on effective tax rate of 7.9% (4.6% state and 3.3% local)

The Bottom Line in 2018

	2015	2016	2017	2018
Spending ROI	\$91	\$93	\$75	\$86
Tax ROI	\$7	\$7	\$6	\$7
State Tax ROI	\$4	\$4	\$3.50	\$4
Local Tax ROI	\$3	\$3	\$2.50	\$3

Every \$1 invested in the 2018 Oklahoma advertising campaign generated \$86 in direct visitor spending and \$7 in taxes in the state.

2018 Campaign Efficiency

	2015	2016	2017	2018
Ad \$s per Trip	\$1.84	\$1.59	\$1.98	\$1.95
Trips per Ad \$	0.5	0.6	0.5	0.5

Longer-term Impact of Advertising – Intent to Visit Oklahoma

	Intend to visit Oklahoma in Next 12 Months*
Overnight Trip Intenders	757,671
Day Trip Intenders	643,482
Total Intenders	1,401,153

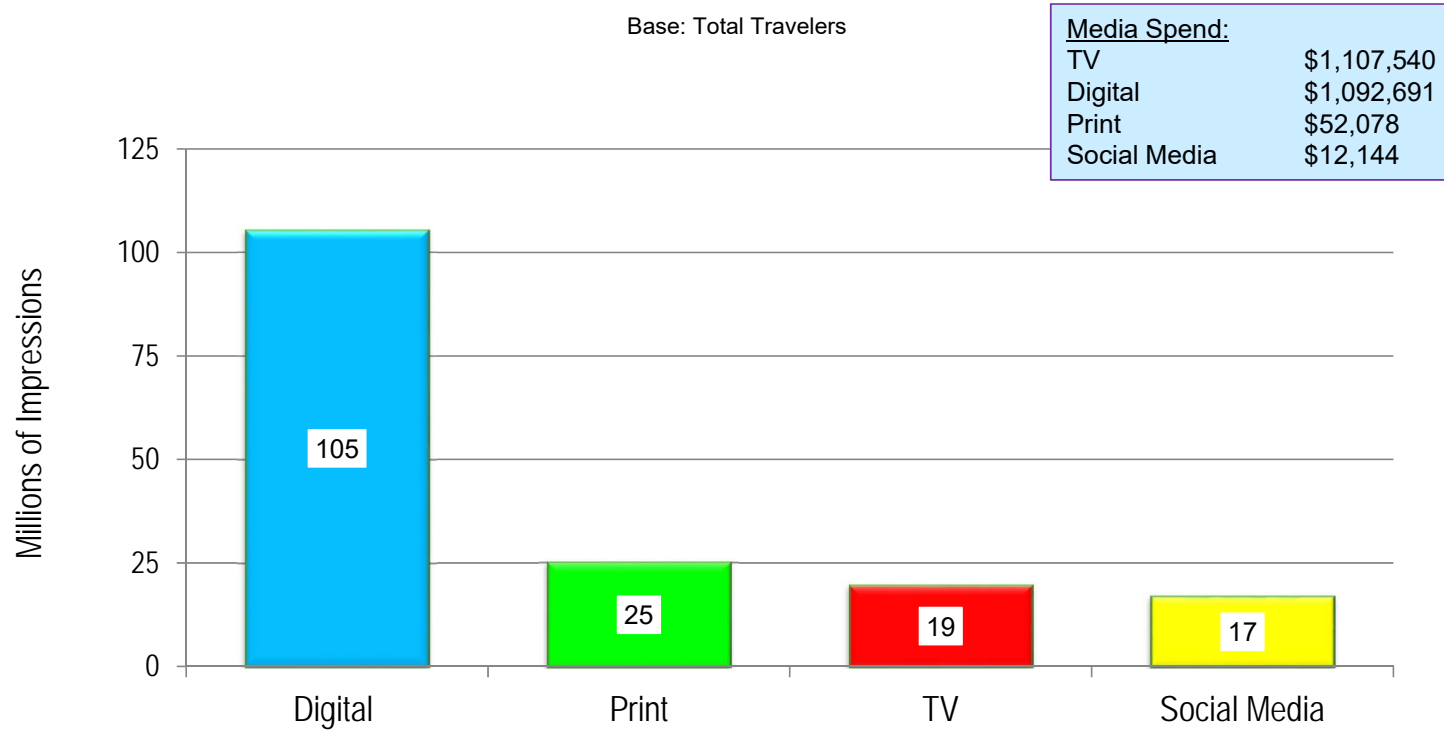
* Among those who did not visit Oklahoma in 2017



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Media Diagnostics

Total Impressions by Media

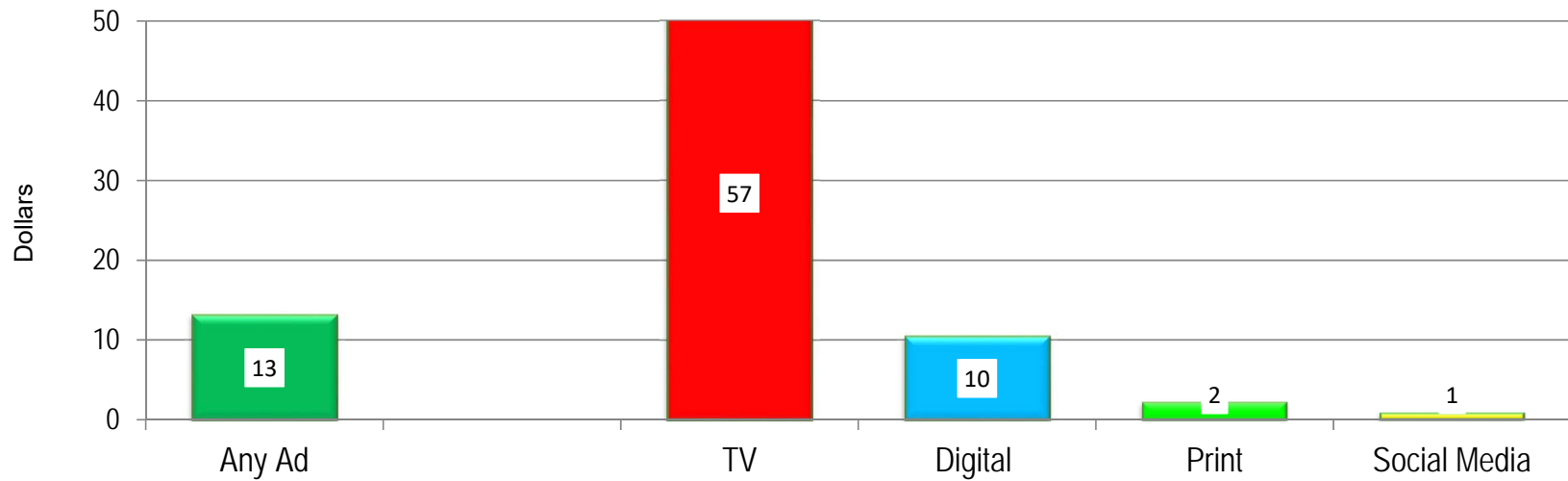


Cost Per Thousand Exposures – By Medium

Base: Total Travelers

Total Exposures = 166.5 Million

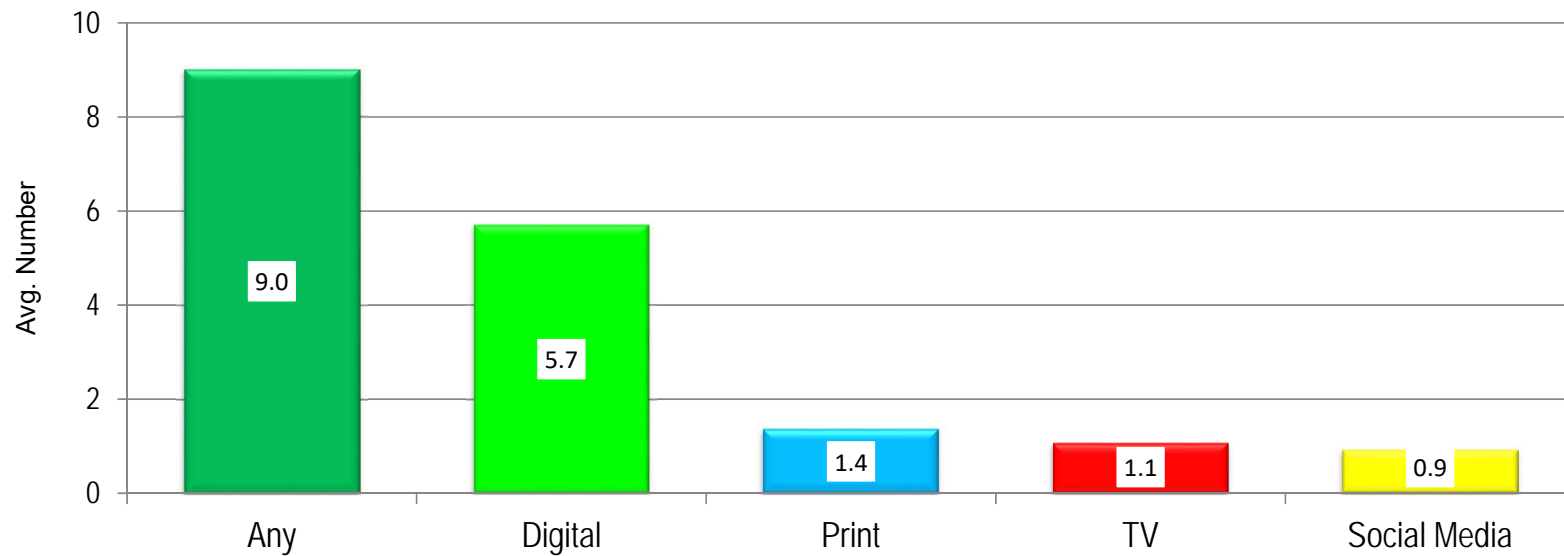
Media Spend:	
TV	\$1,107,540
Digital	\$1,092,691
Print	\$52,078
Social Media	\$12,144



Frequency of Ad Exposure Recalled*

Base: Total Travelers

Total = 166.5 Million Exposures



*Saw at least one ad



**Main Findings:
Oklahoma's Overall
Position in the Target
Market**



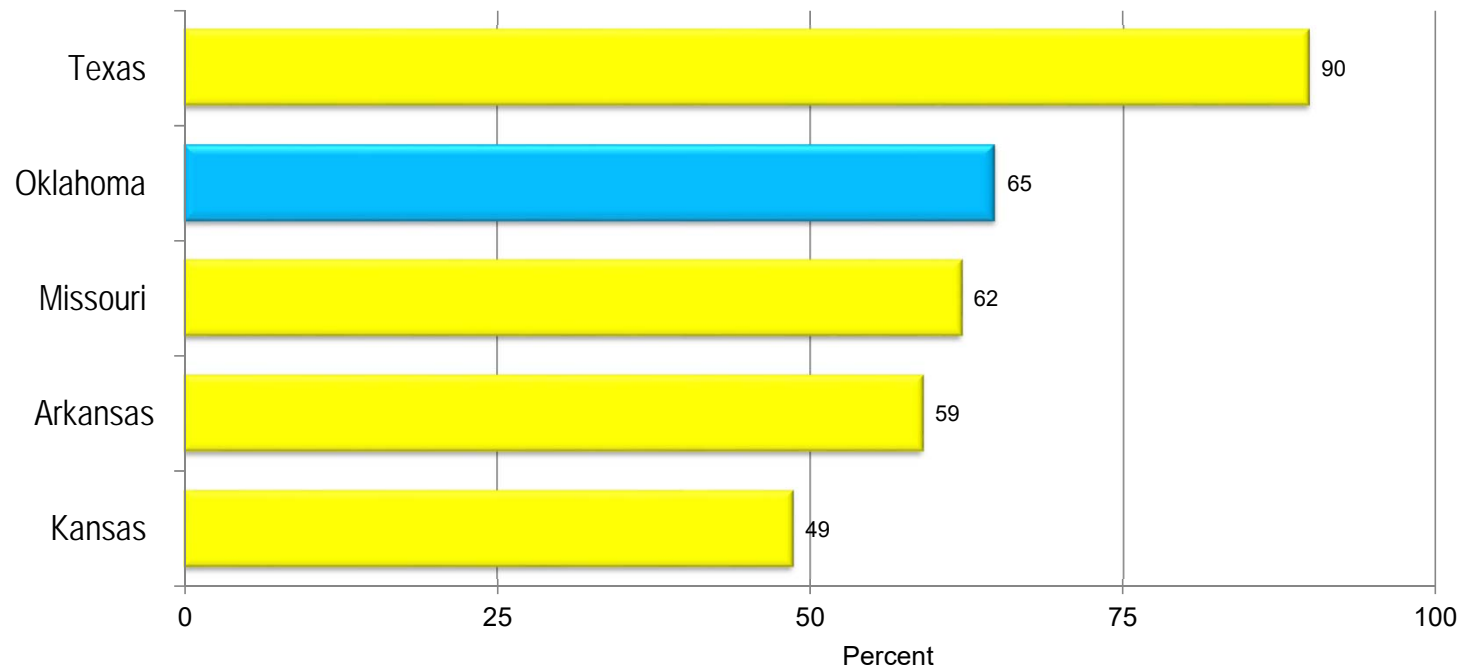
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**Destination
Visitation
& Interest**

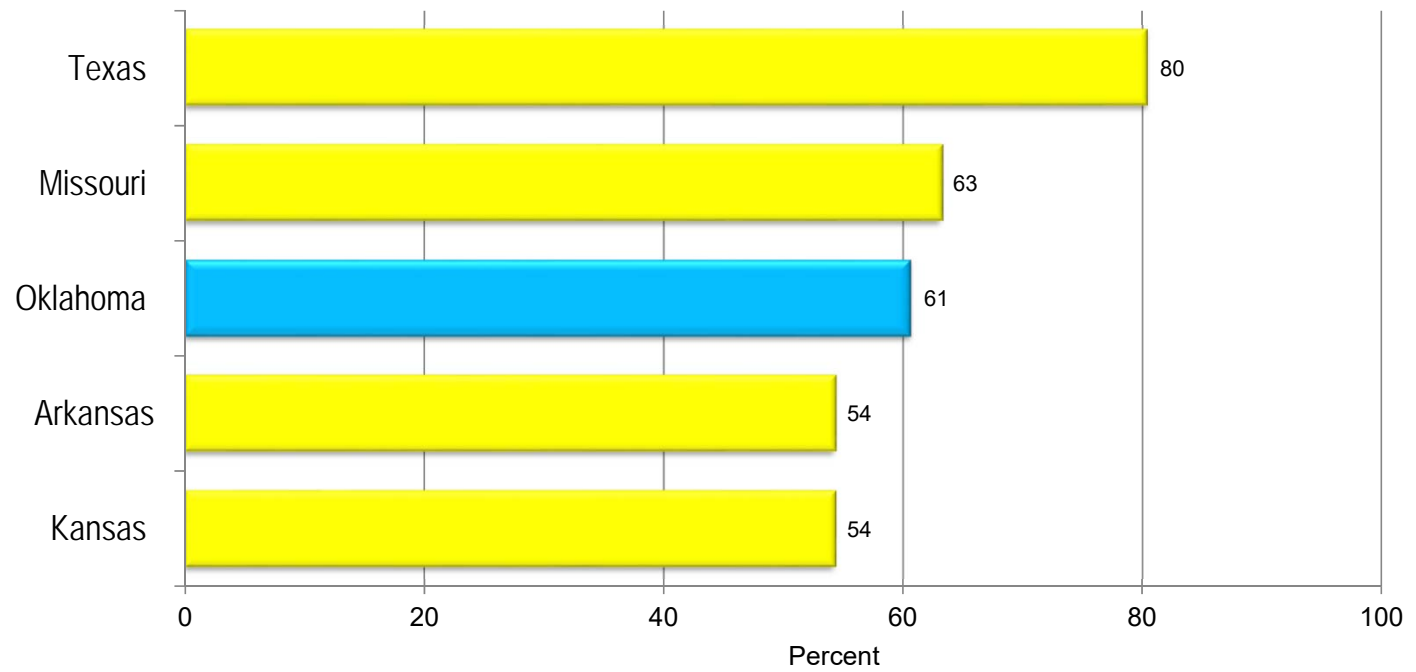
The Competitive Set

- Texas is the big player in this competitive set, with the majority of respondents being past visitors and possible future visitors.
- Of the competitive set, Oklahoma is second to Texas in terms of destinations ever visited and destinations visitors intend to visit in the near future.
- For destinations visited in the past two years, Oklahoma moves from the second to the third place after Texas and Missouri.
- Almost half of respondents intend to visit Oklahoma in the next 12 months.

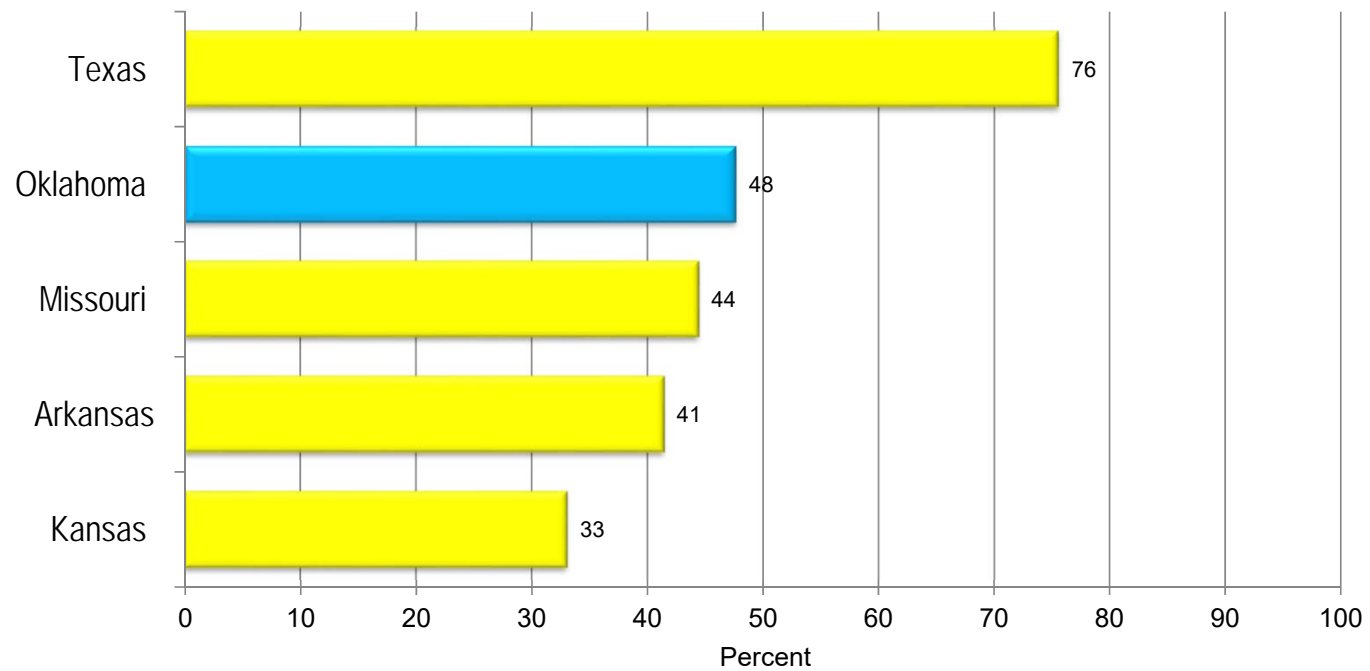
Destinations Ever Visited



Destinations Visited in Past 2 Years



Destinations Intend to Visit in Next Twelve Months





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Destination Hot Buttons

Travel Motivators

- Respondents evaluated the image of Oklahoma and four other destinations on an overall basis and on a series of 70 additional detailed image attributes.
- To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:
 - For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.
- Then, in order to better communicate the results, the data were grouped into broader categories or factors.
- For a destination in this competitive set to get on travelers’ consideration list, it must, first and foremost, be perceived to:
 - Be **exciting** – being seen as exciting means being a must-see place to visit, offering many once-in-a-lifetime experiences and a real sense of fun and adventure.
 - Be suitable for **adults** and couples – which is logical, since they are paying for the vacation.

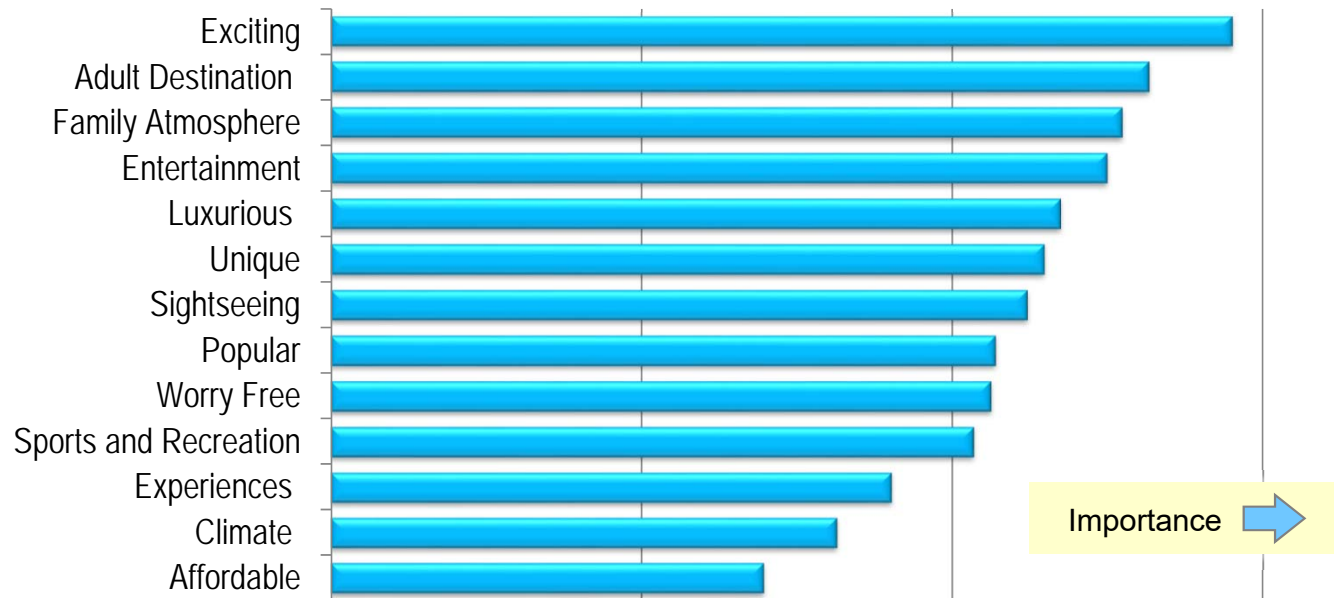
Travel Motivators

- There are several factors that individually are of moderate importance, but that in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - **Uniqueness**, including the scenery, local food, people and culture.
 - A safe, welcoming and **worry-free** environment.
 - **Climate**.
 - Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, walkability, parks, museums, etc.

Travel Motivators

- Lower priorities are:
 - The availability of **luxurious** accommodations and dining.
 - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising or favorable reviews?
 - A great **family atmosphere** – with things to see and do that kids would especially enjoy.
 - The opportunities for **entertainment**, e.g., shopping, theater, nightclubs, live music, professional sports events.
 - **Sports and recreation**, including organized activities (e.g., golf, tennis), water sports such as swimming/beaches, and other outdoor recreation.
- **Affordability** is also relatively unimportant at the wish list stage:
 - But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
 - Affordability includes both the cost of getting to the destination/distance to market and costs once you have arrived, such as food and lodging.

Travel Motivators



*A measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

Top 10 Hot Buttons

Top 10 Hot Buttons
A fun place for a vacation
An exciting place
A place everyone should visit at least once
Good for an adult vacation
Provides a unique vacation experience
A vacation there is a real adventure
Lots of things to see and do
Excellent shopping
Good place for families to visit
Popular with vacationers



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Oklahoma's Image vs. Competition

Oklahoma's Image

- Relative to the other destinations in the competitive set for this study, Oklahoma trails the other states with the exception of Kansas:
 - Across the markets surveyed, 4 in 10 (41%) rated Oklahoma very favorably as a destination they “would really enjoy visiting.”
 - Texas leads the competitive pack with 68%.
 - Oklahoma was ahead of Kansas at 33%.
- On the other overall image measure, perceptions for “value for money,” the rank ordering shows the same trend:
 - Oklahoma and Kansas are again at the bottom of the list.

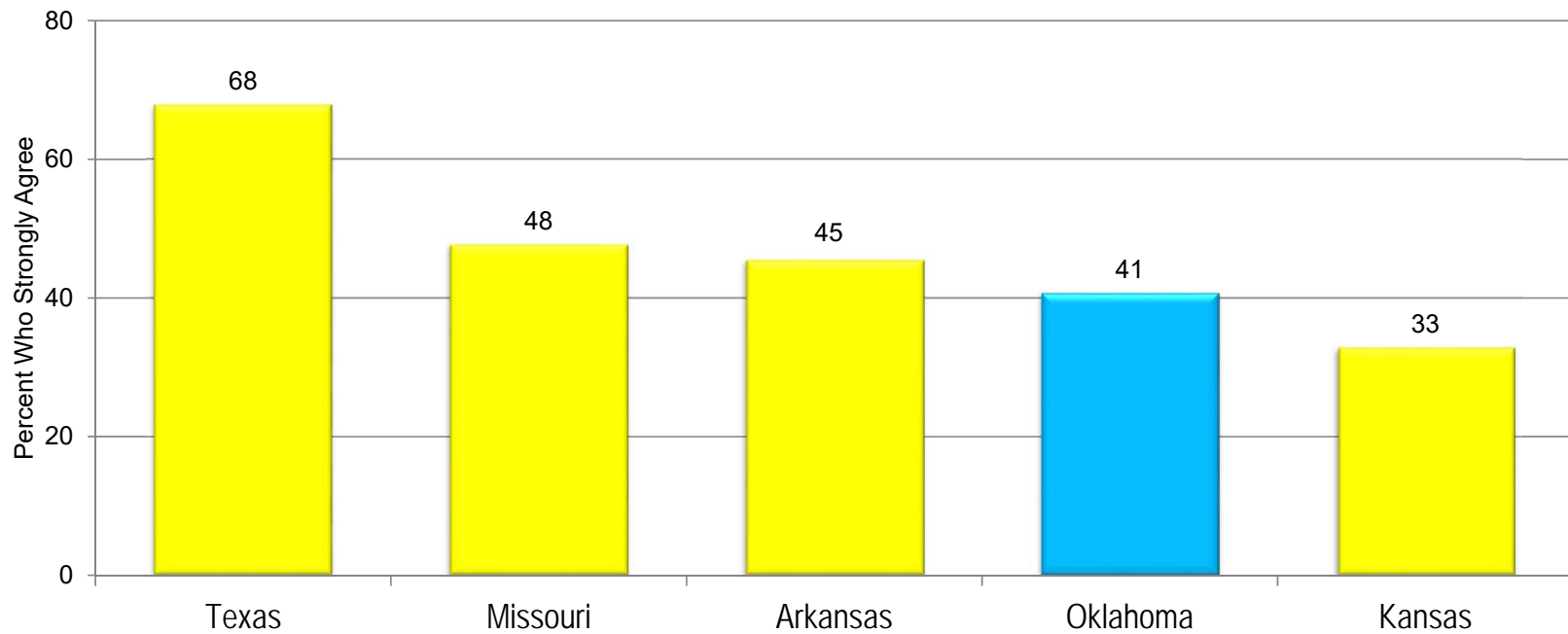
Oklahoma's Image

- Oklahoma outranked its competitors as a group on “affordability” and “experiences.”
- When comparing Oklahoma’s image versus the image of the combined competition, Oklahoma’s top image strengths are related to:
 - Affordability
 - Worry-free destination
 - Adult destination
 - Family/kids orientation
 - Sightseeing
- Compared to its competitors, Oklahoma is not seen as a “popular” destination.
- When we compare ratings of Oklahoma versus the individual competitors, there are two areas in which Oklahoma appears to have a unique advantage over its competitors:
 - Experiences
 - Affordability
- Oklahoma offers visitors Western heritage and Native American culture experiences that its competitors do not rank as high in. In this overall category, Oklahoma is second only to Texas.

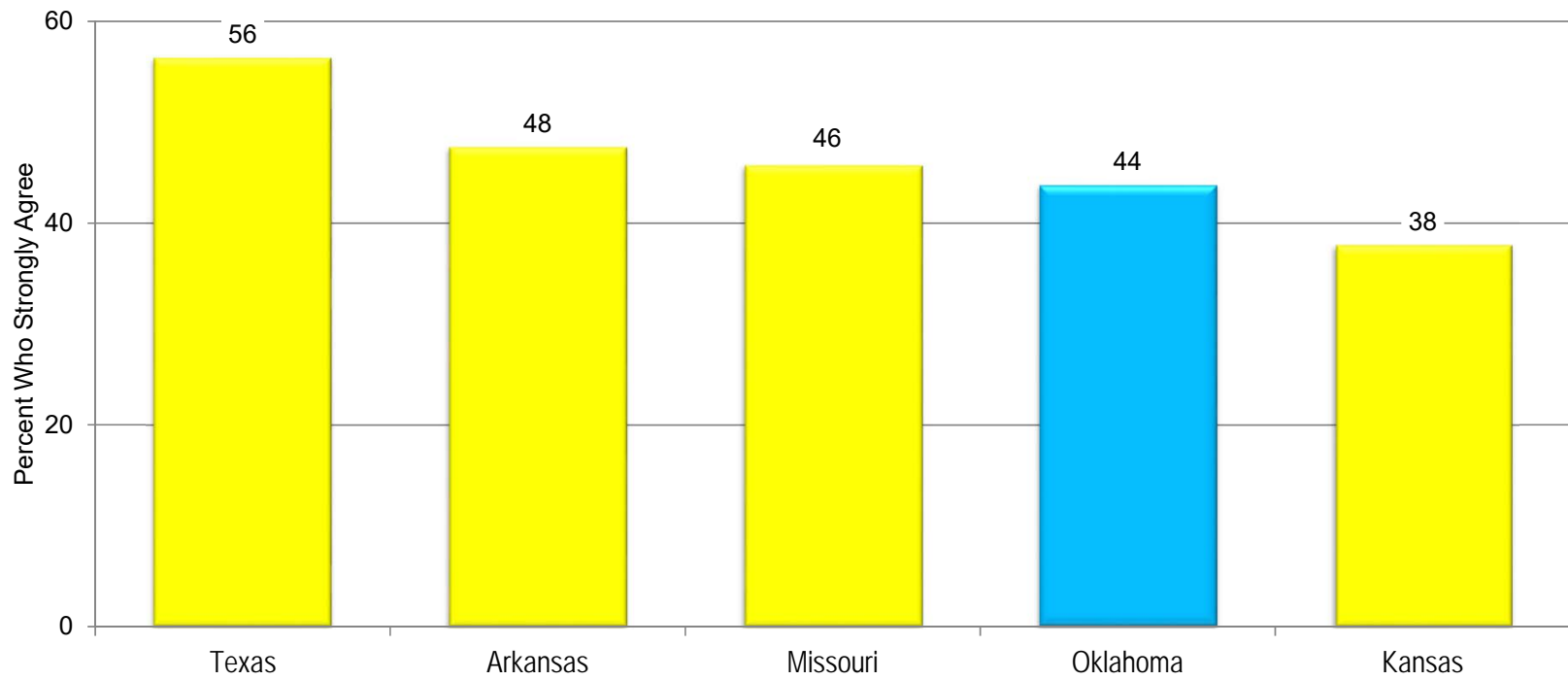
Oklahoma's Image

- Texas is the clear leader in this group outranking all of the other destinations with these exceptions:
 - “Truly beautiful scenery” and “Beautiful fall colors/foilage”—Arkansas was the leader
 - “Great for experiencing Native American culture” –Oklahoma was the leader
 - “Affordable accommodations” –Arkansas was the leader
- Missouri is second to Texas with its strengths being an exciting destination for adults and families that has lots of entertainment and luxury options.
- Arkansas’s strengths are sports and recreation offerings, as well as having beautiful outdoor scenery.

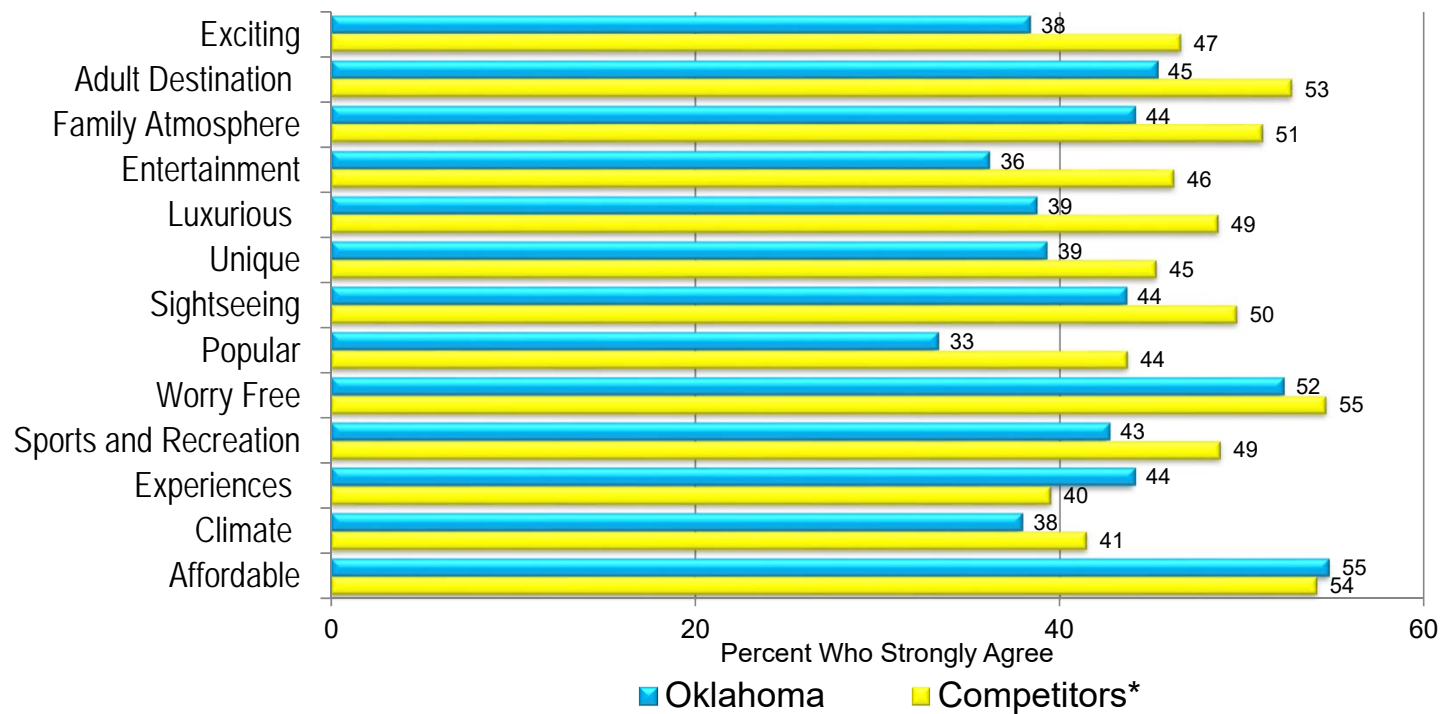
Oklahoma's Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”



“Excellent Value For the Money”

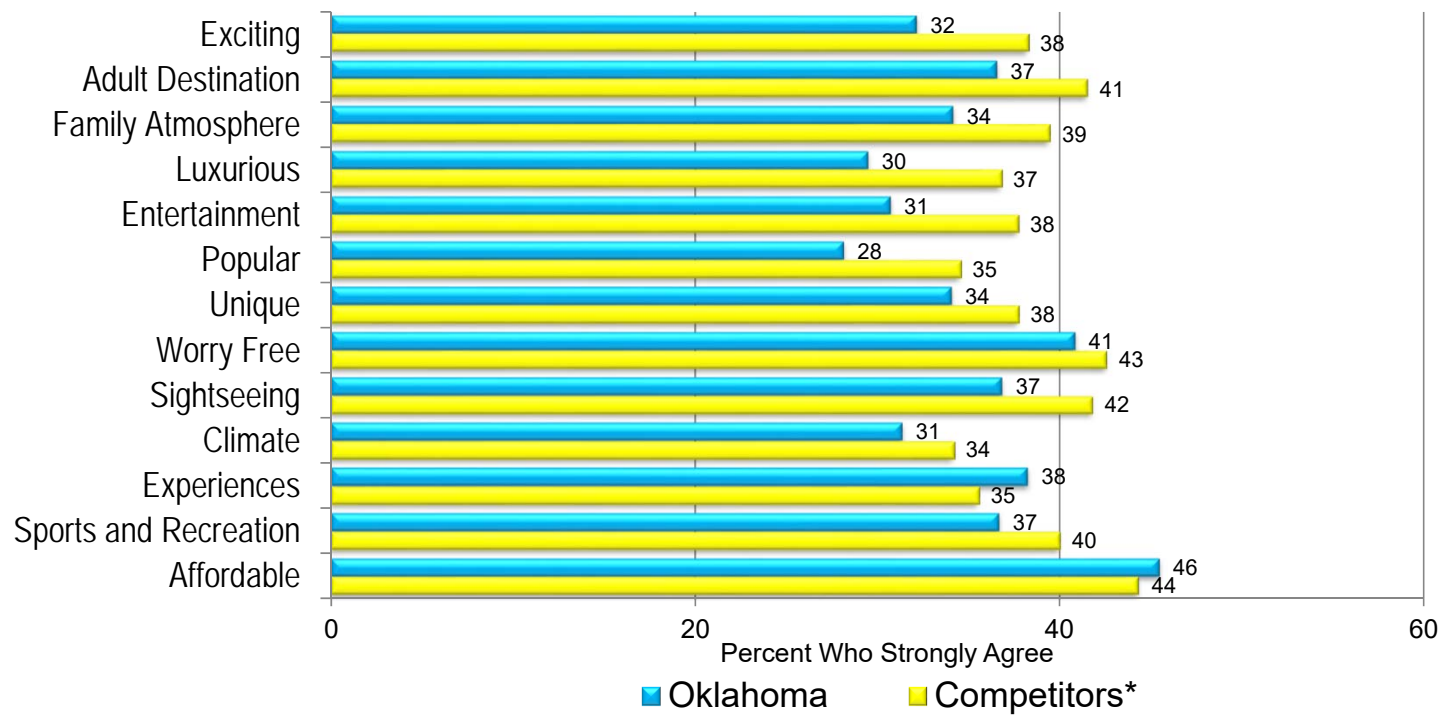


2018 Oklahoma's Overall Image vs. Competition



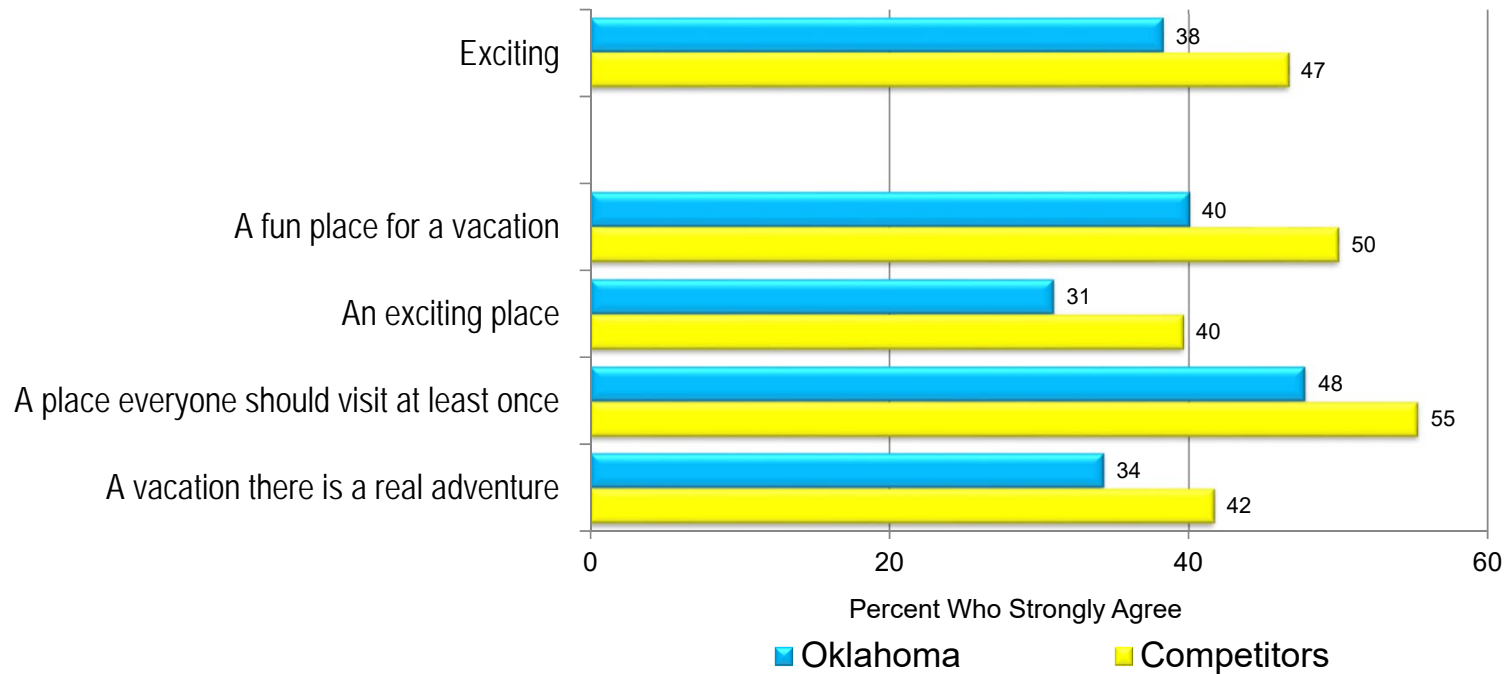
* Includes Arkansas, Texas, Missouri and Kansas

2015 Oklahoma's Overall Image vs. Competition

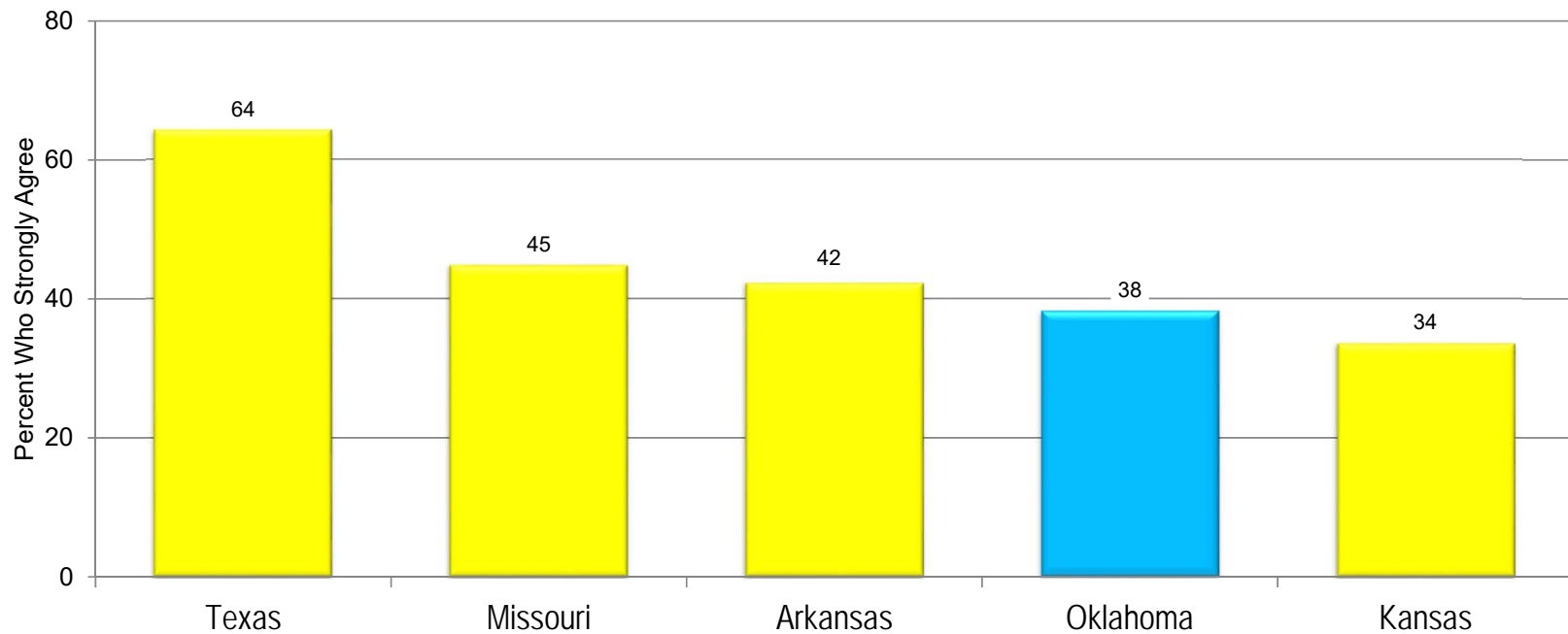


* Includes Arkansas, Texas, Missouri and Kansas

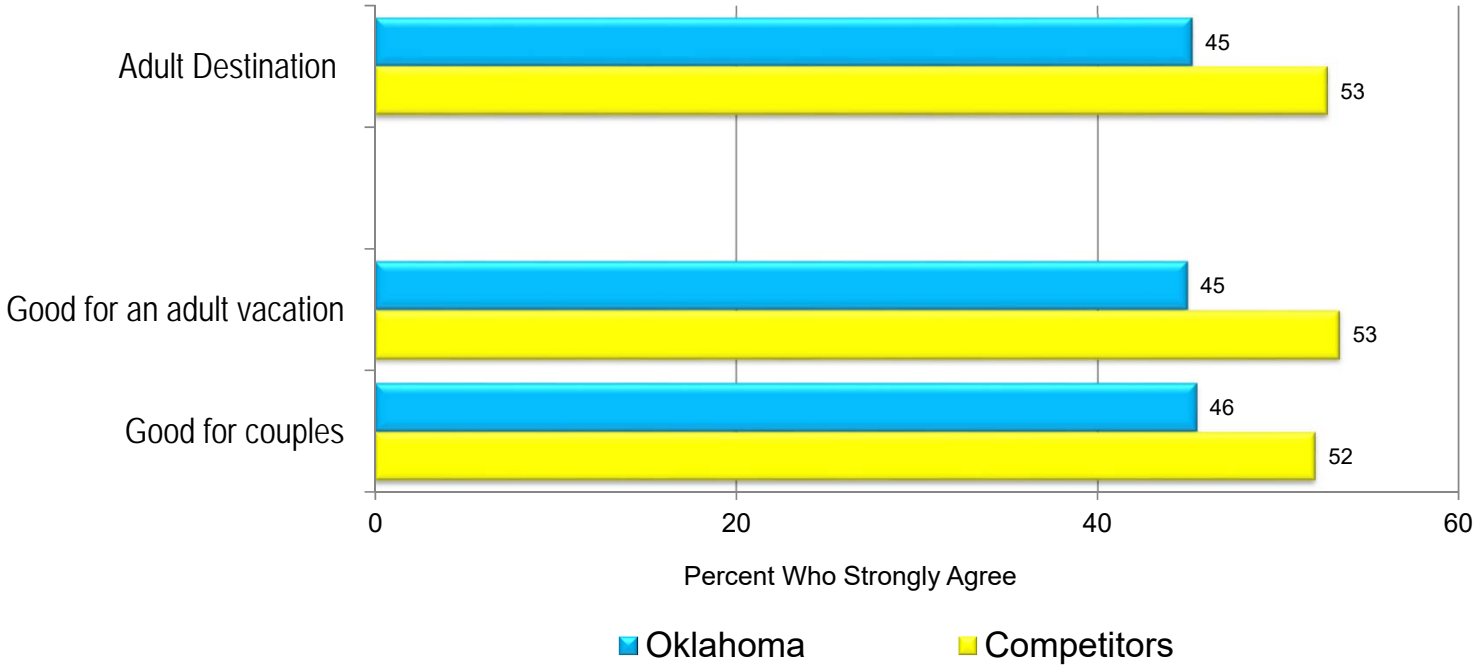
Oklahoma's Image vs. Competition — Exciting



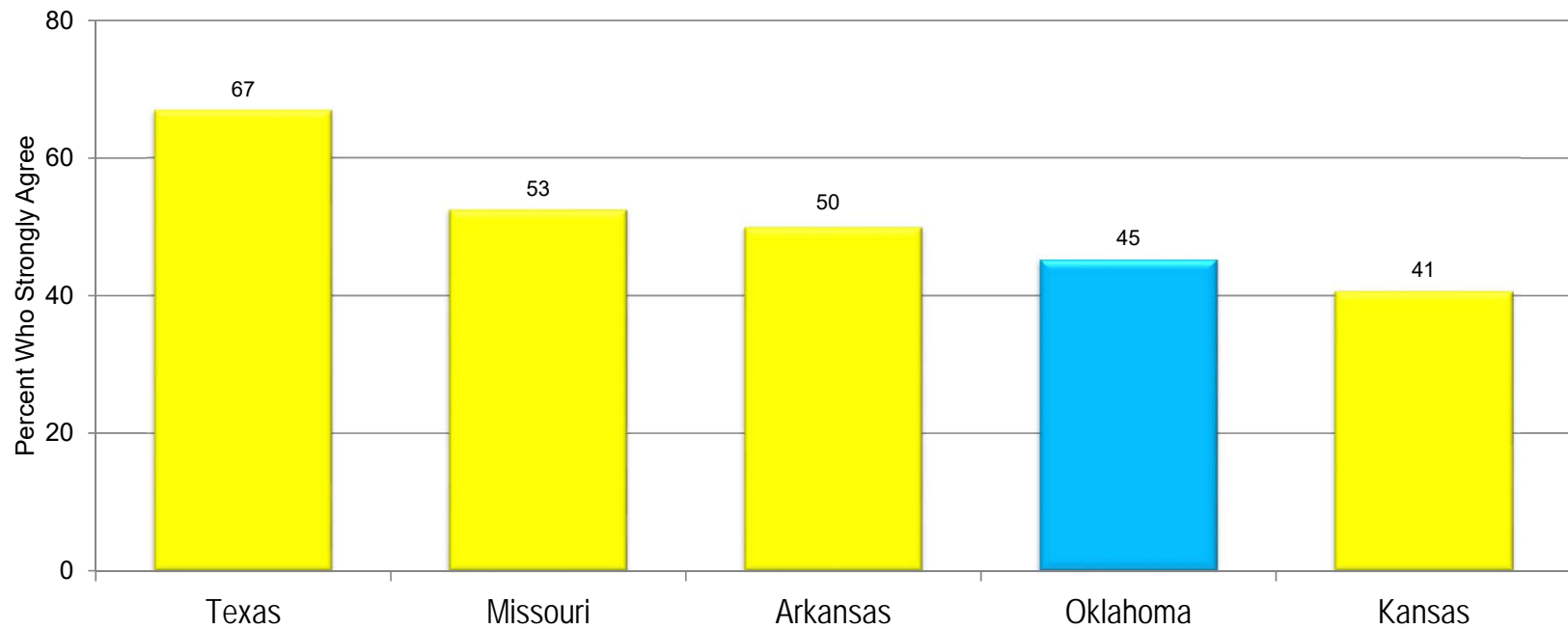
Oklahoma's Image vs. Competition — Exciting



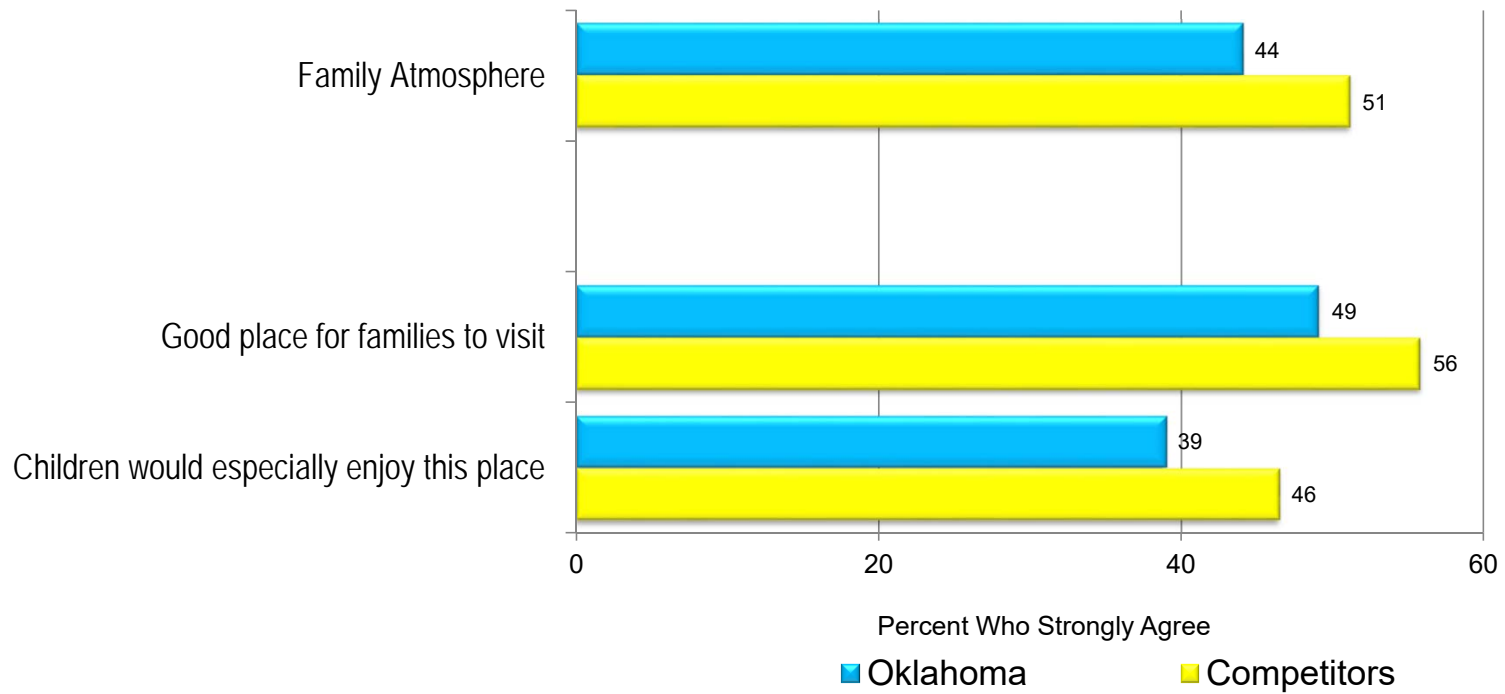
Oklahoma's Image vs. Competition — Adult Destination



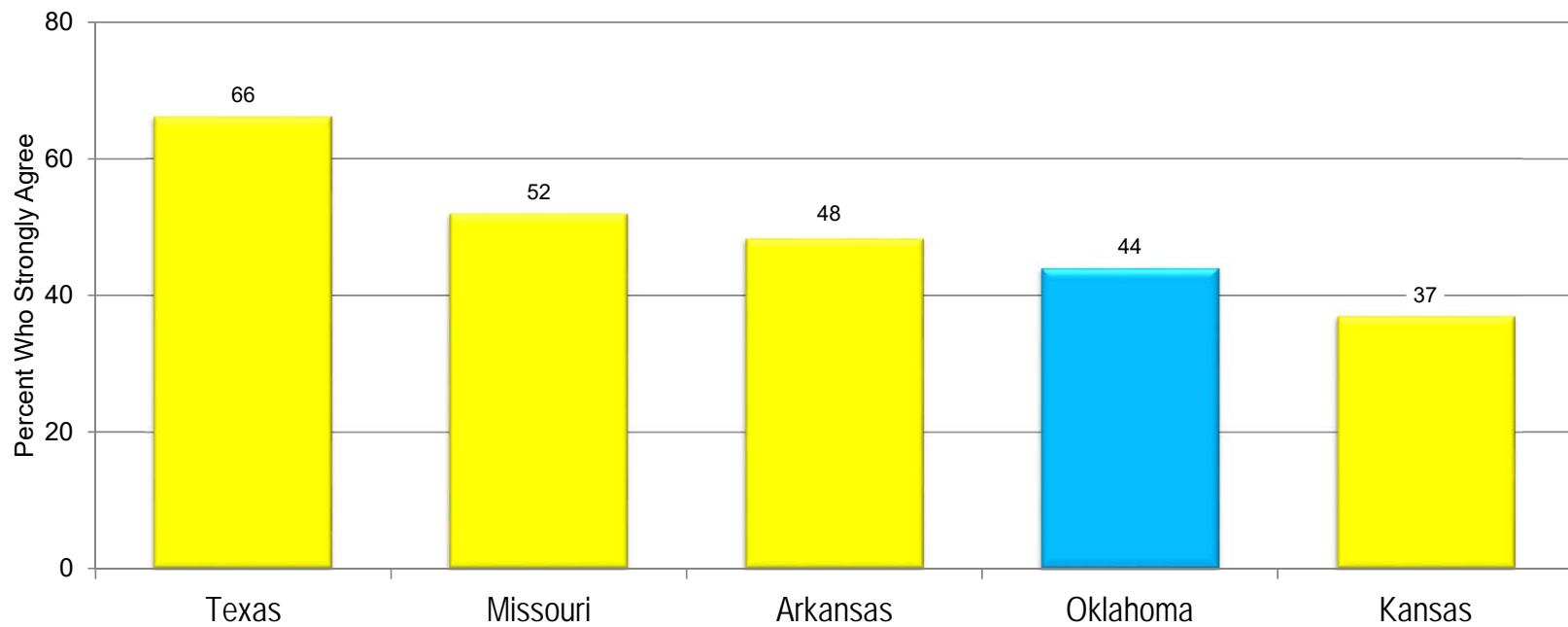
Oklahoma's Image vs. Competition — Adult Destination



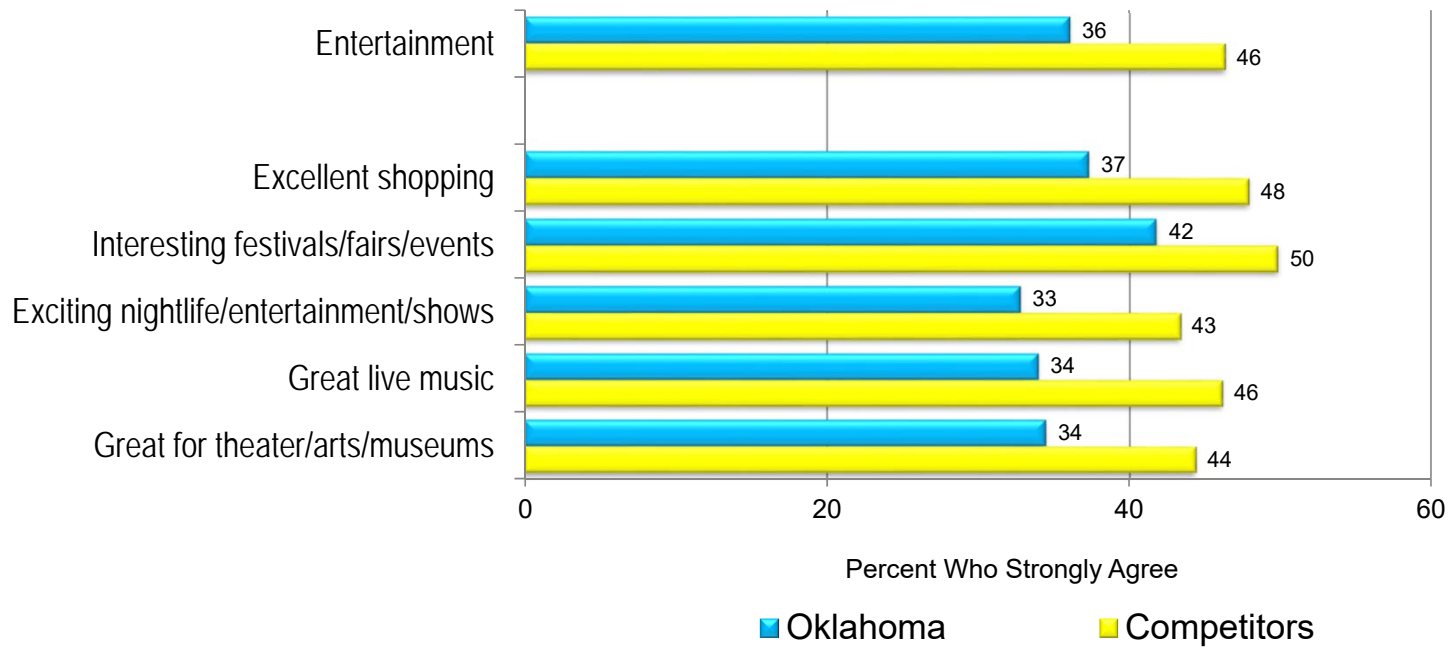
Oklahoma's Image vs. Competition — Family Atmosphere



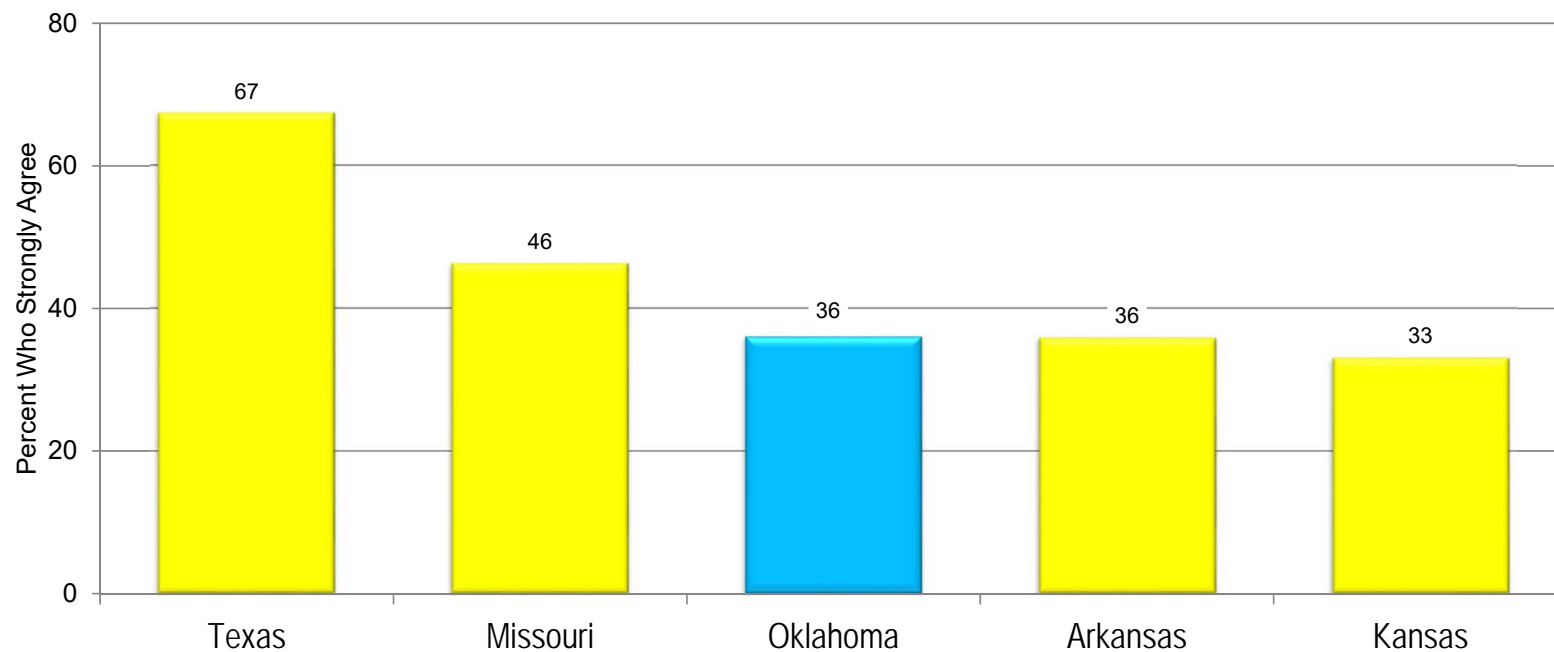
Oklahoma's Image vs. Competition — Family Atmosphere



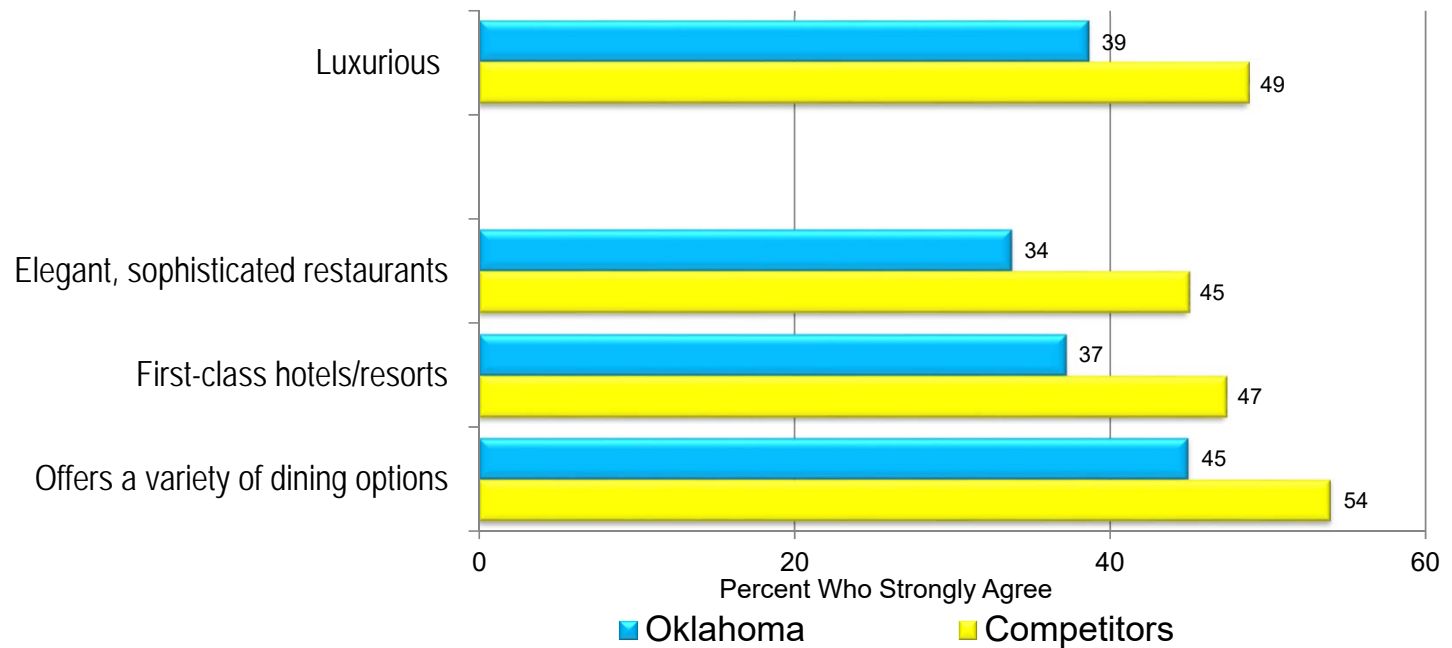
Oklahoma's Image vs. Competition — Entertainment



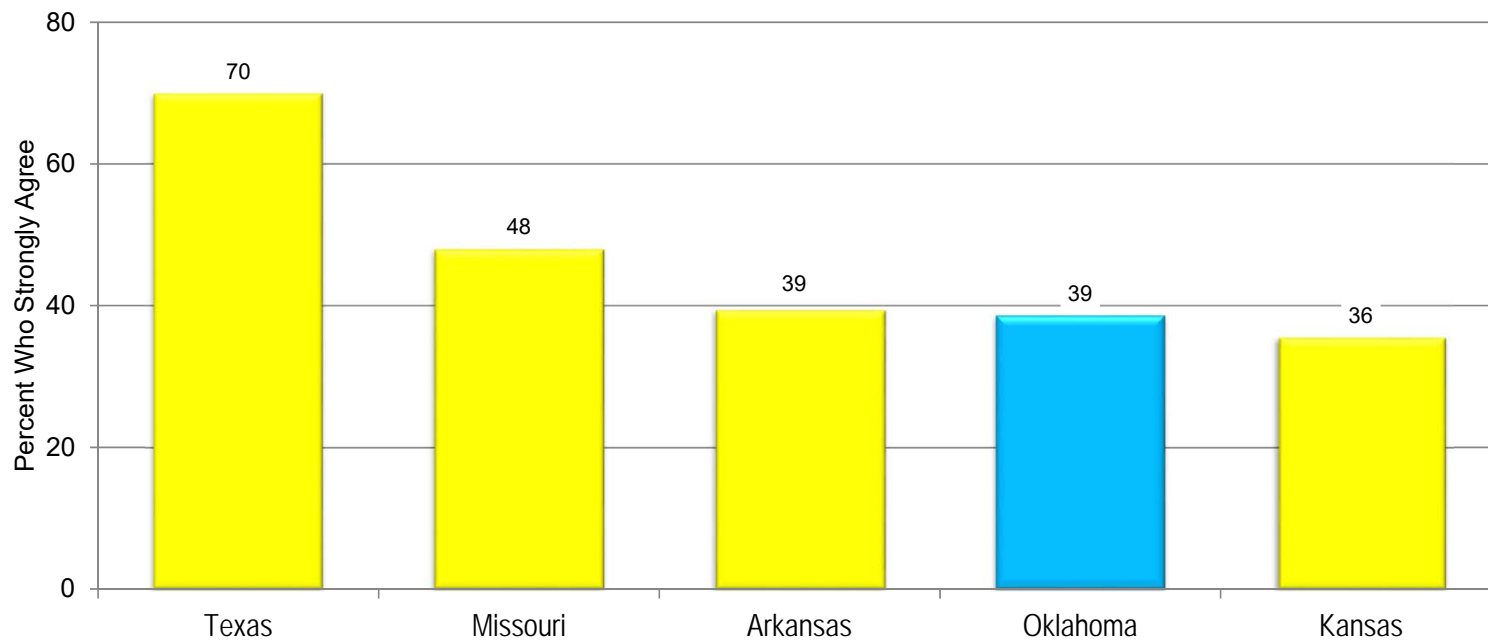
Oklahoma's Image vs. Competition — Entertainment



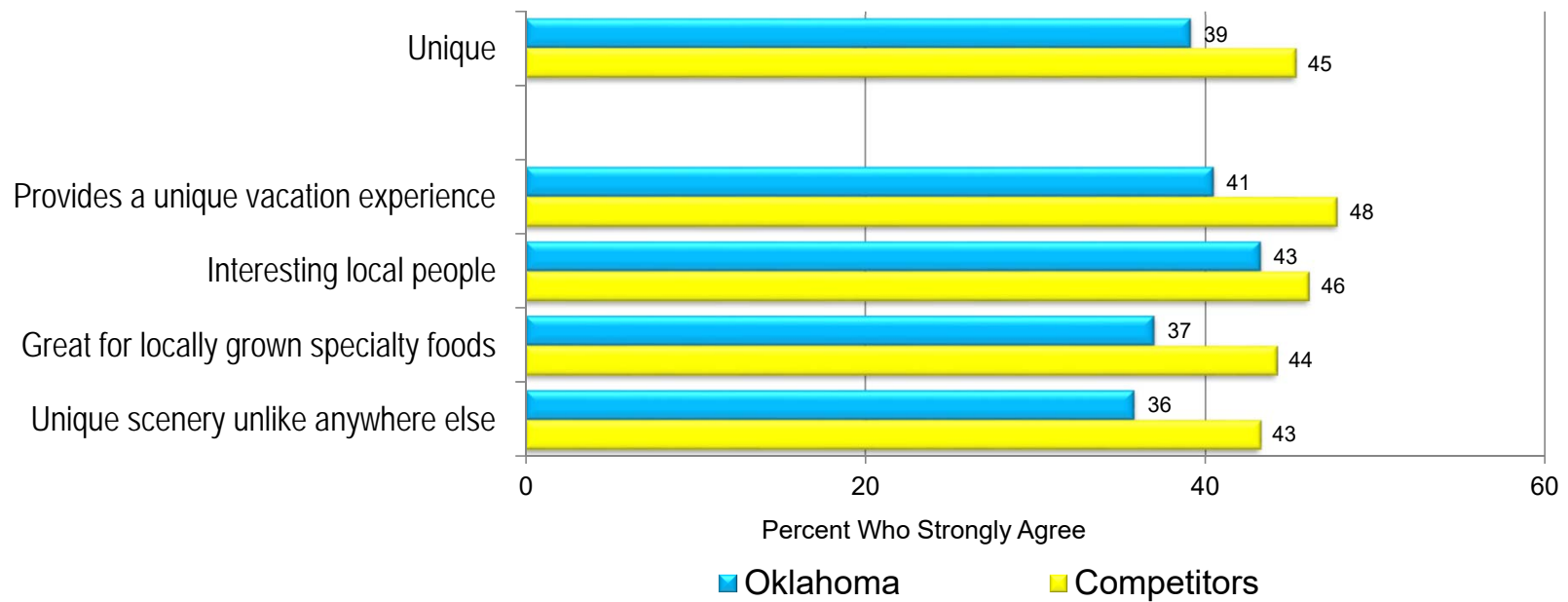
Oklahoma's Image vs. Competition — Luxurious



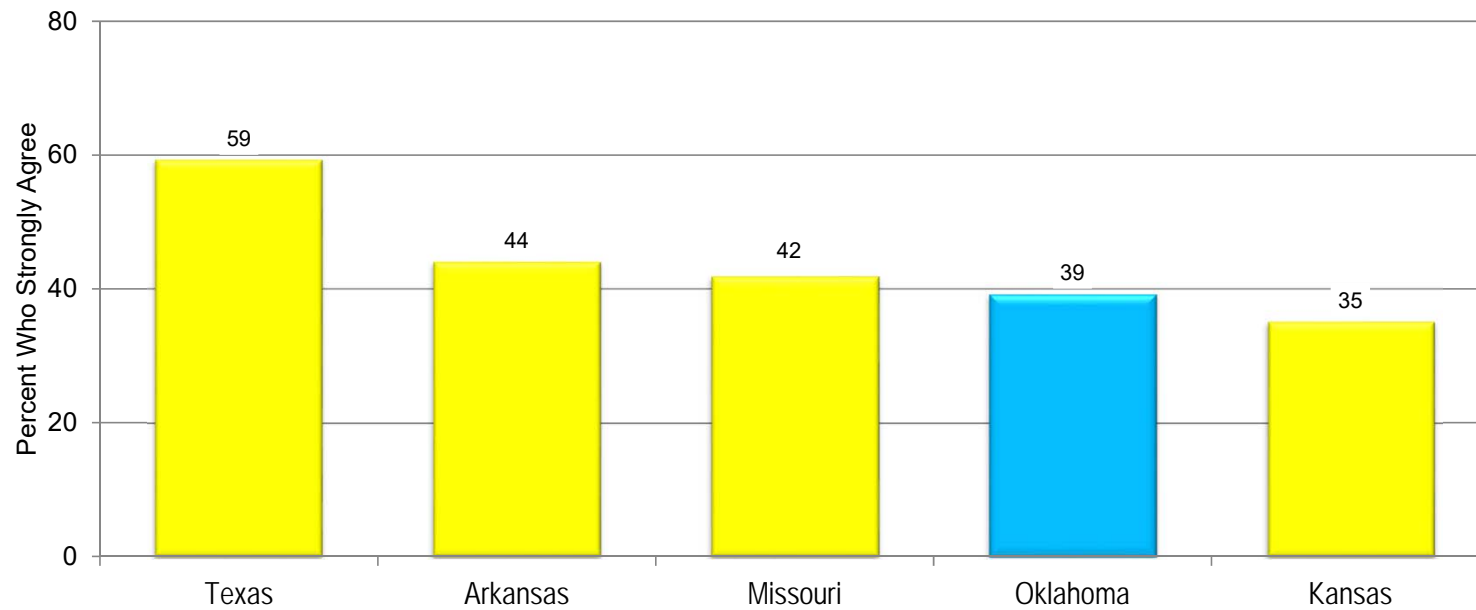
Oklahoma's Image vs. Competition — Luxurious



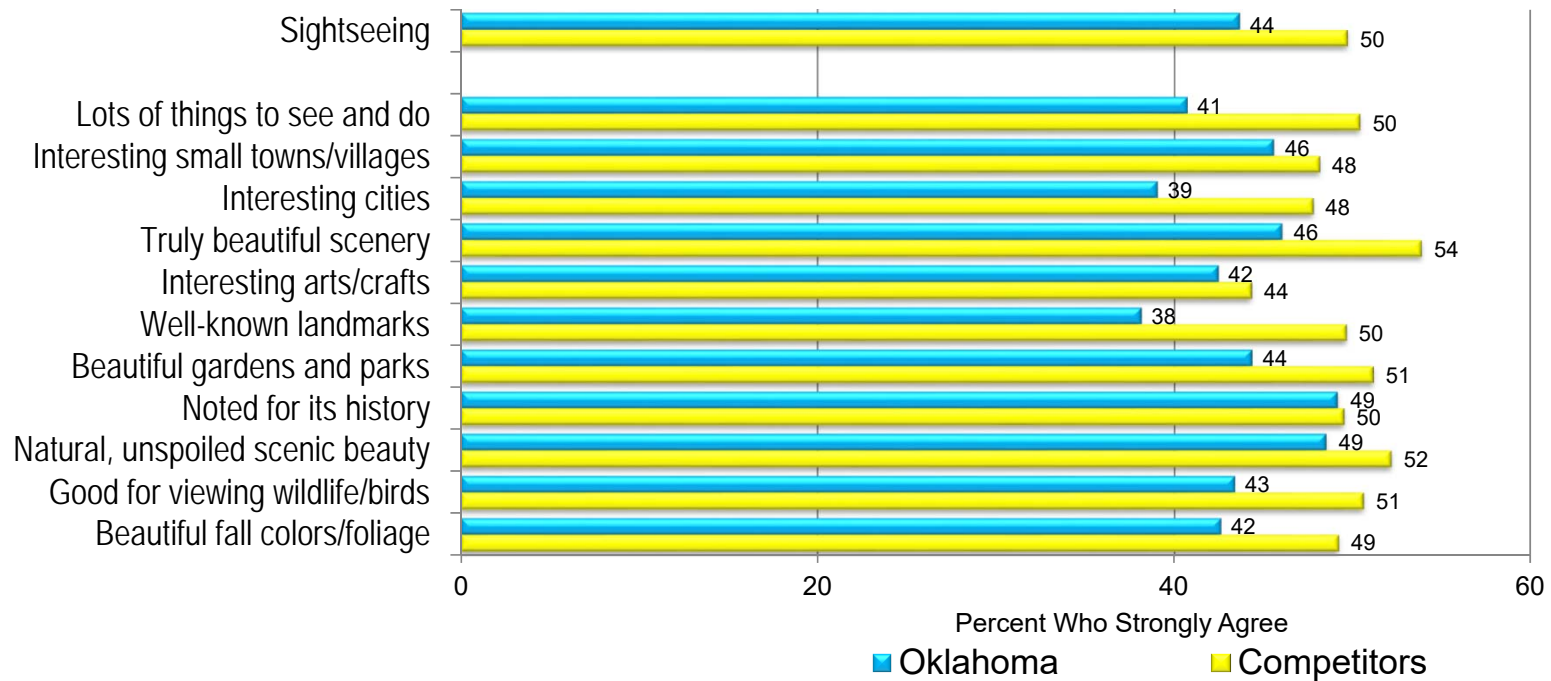
Oklahoma's Image vs. Competition — Unique



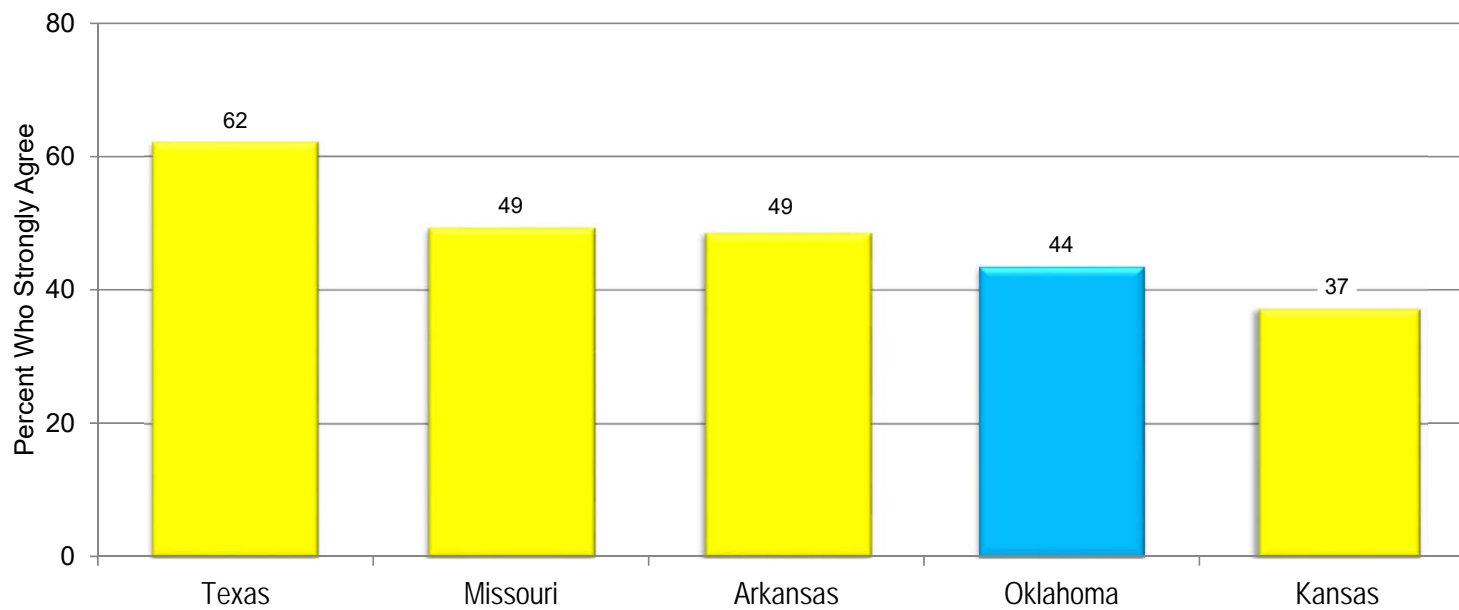
Oklahoma's Image vs. Competition — Unique



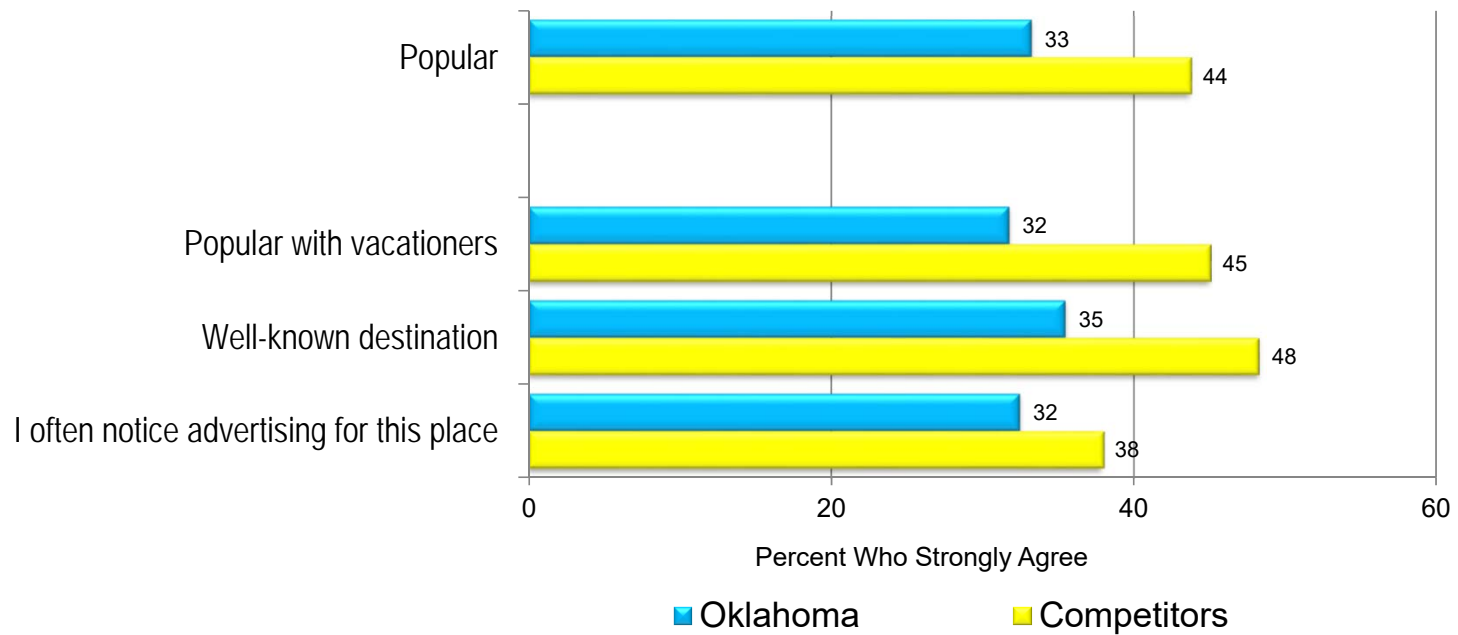
Oklahoma's Image vs. Competition — Sightseeing



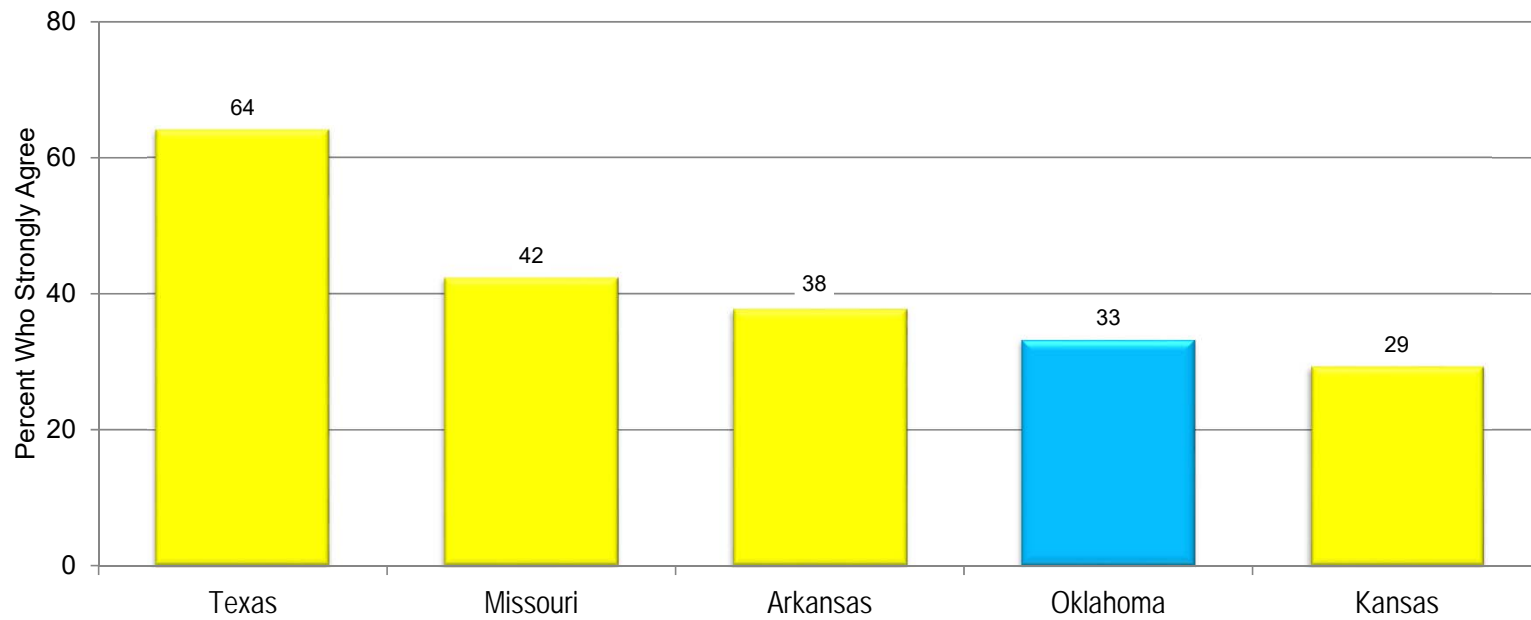
Oklahoma's Image vs. Competition — Sightseeing



Oklahoma's Image vs. Competition — Popular

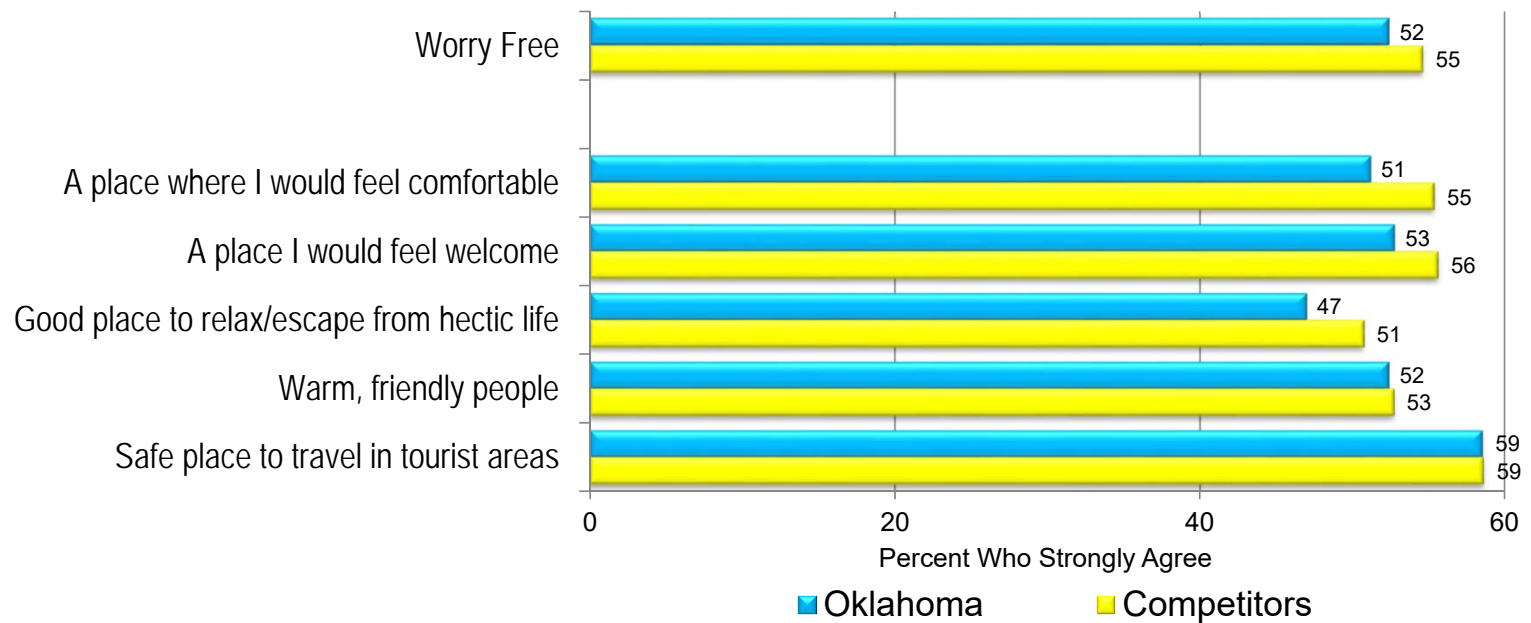


Oklahoma's Image vs. Competition — Popular

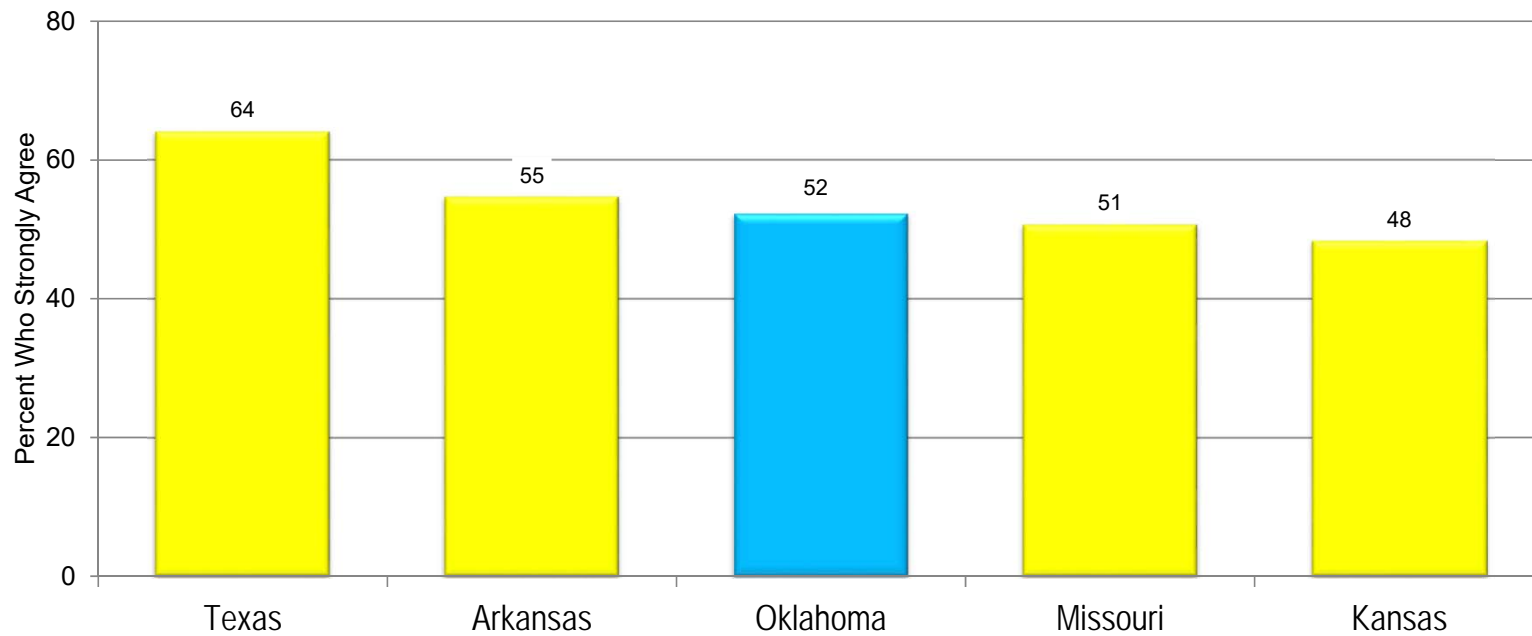


Oklahoma's Image vs. Competition

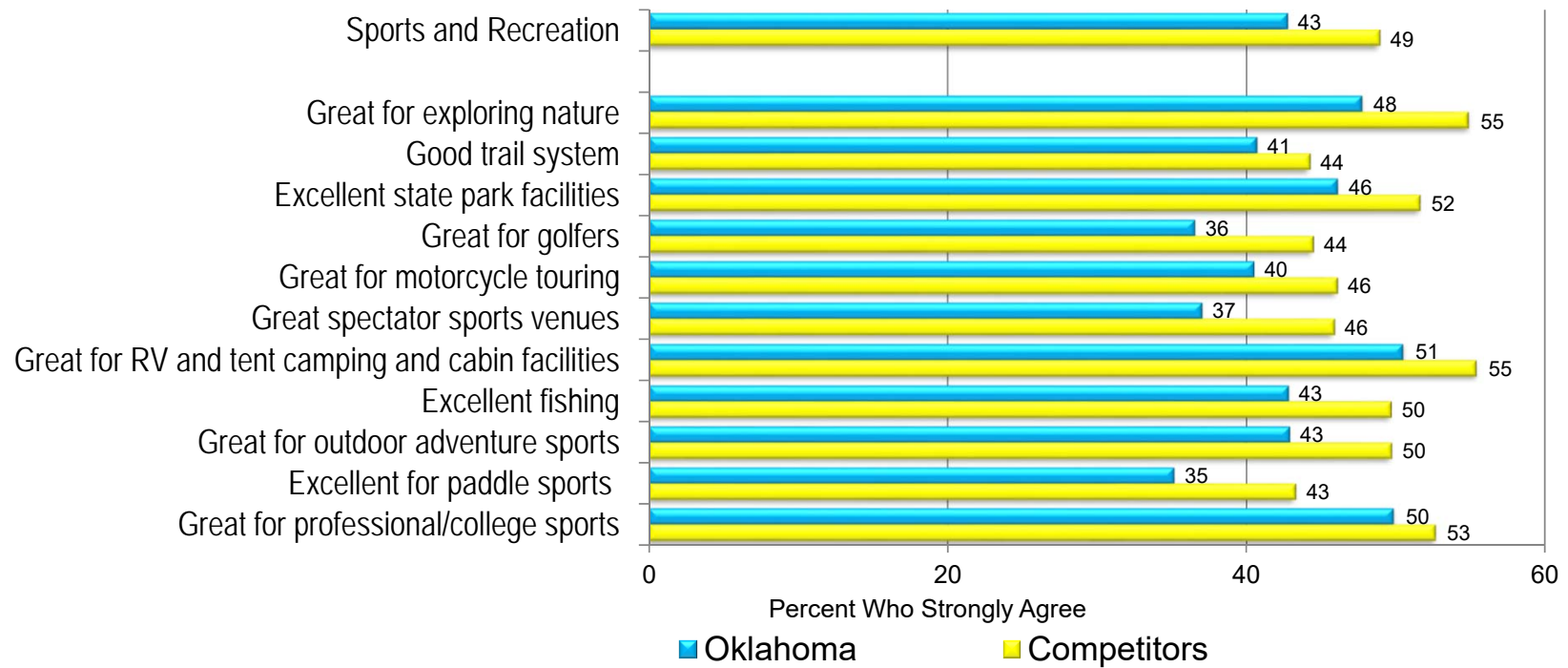
— Worry-free



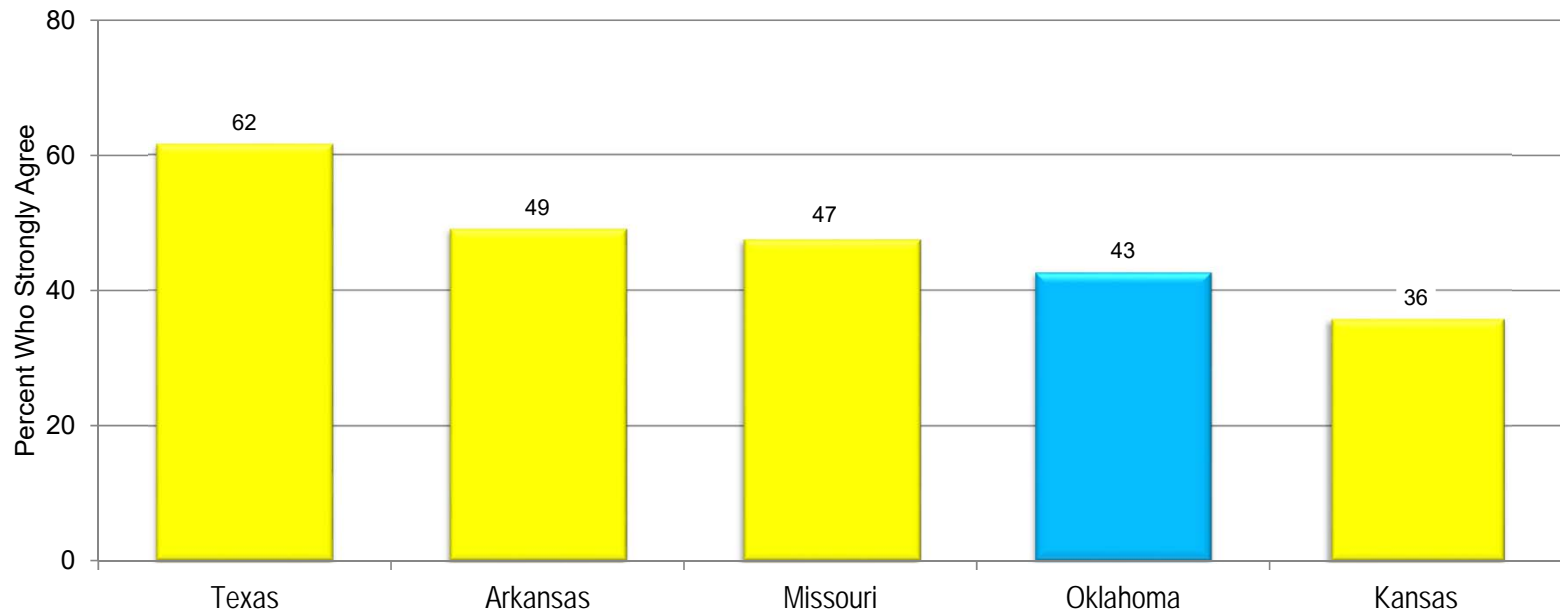
Oklahoma's Image vs. Competition — Worry-free



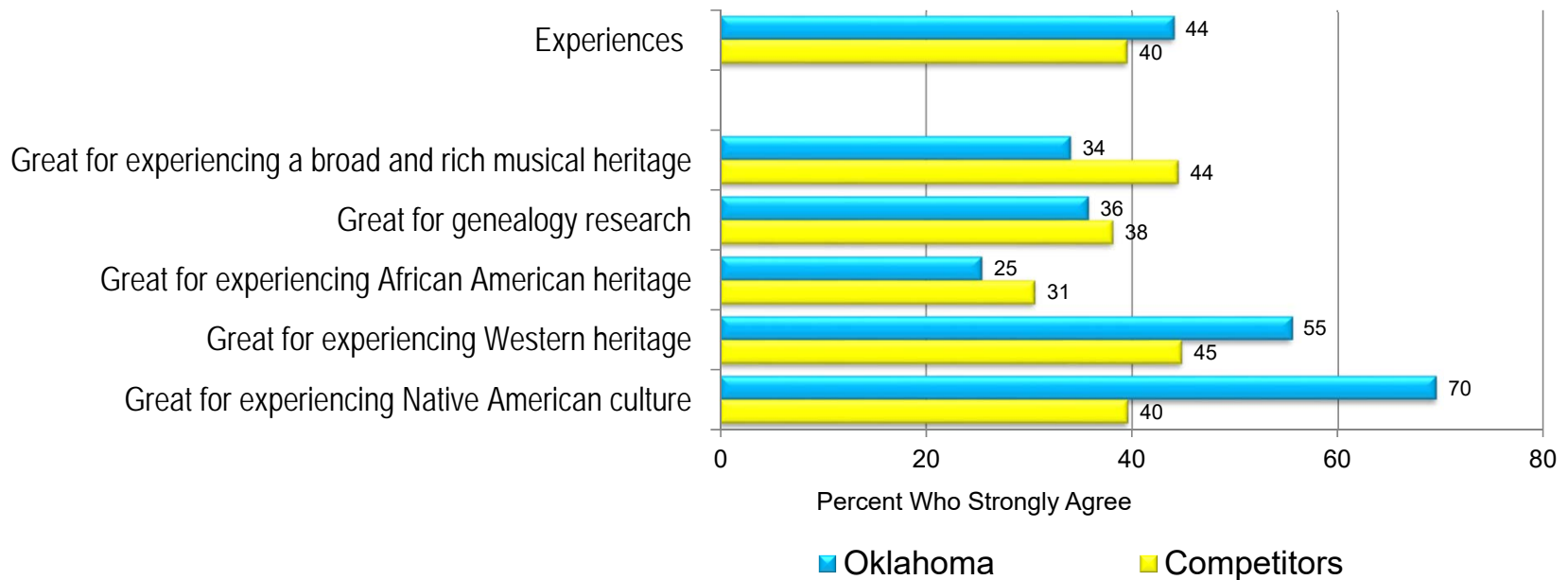
Oklahoma's Image vs. Competition — Sports & Recreation



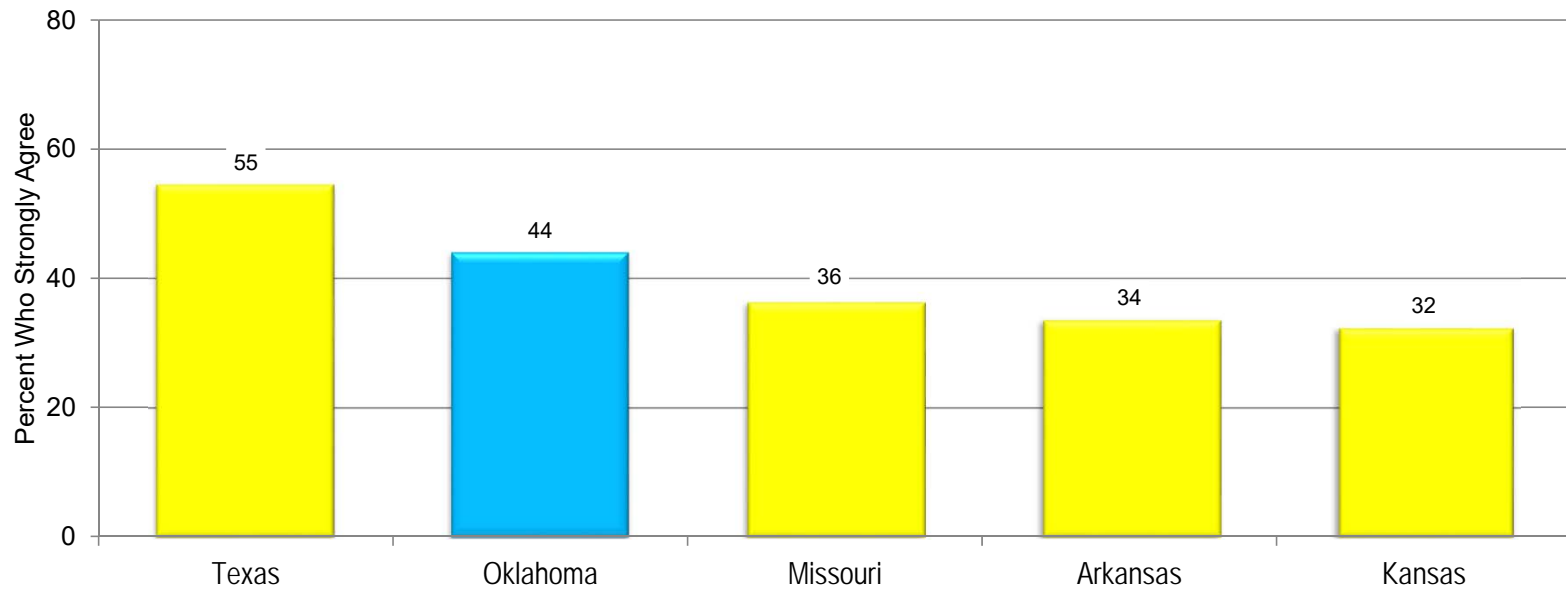
Oklahoma's Image vs. Competition — Sports & Recreation



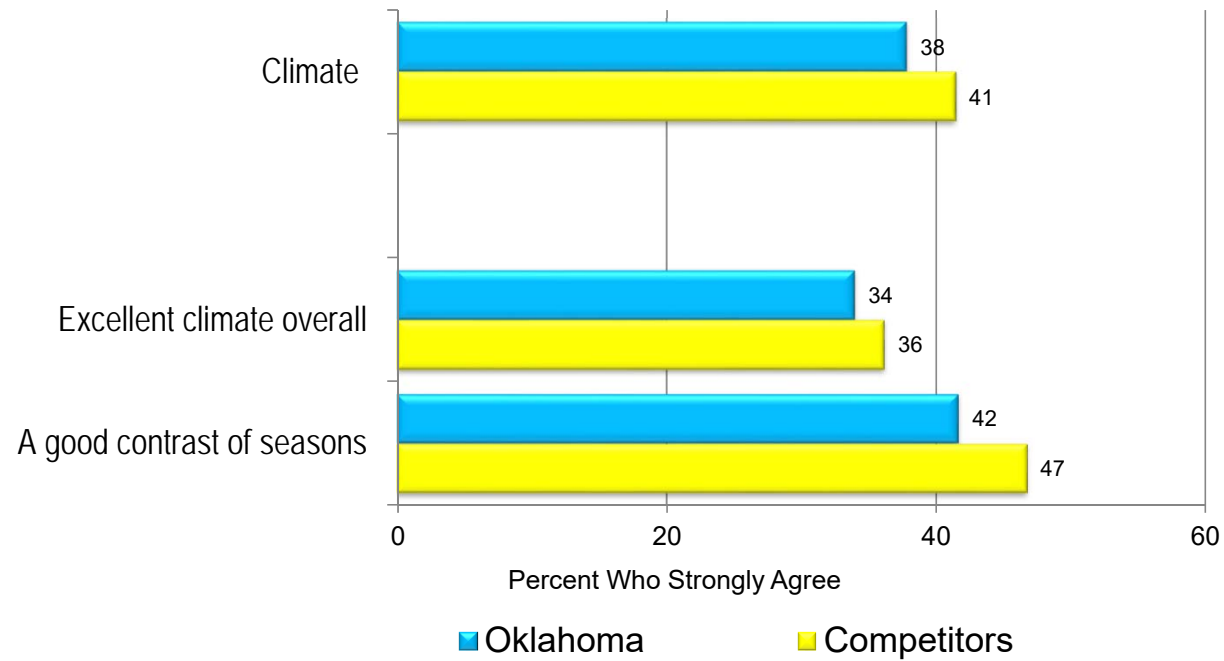
Oklahoma's Image vs. Competition — Experiences



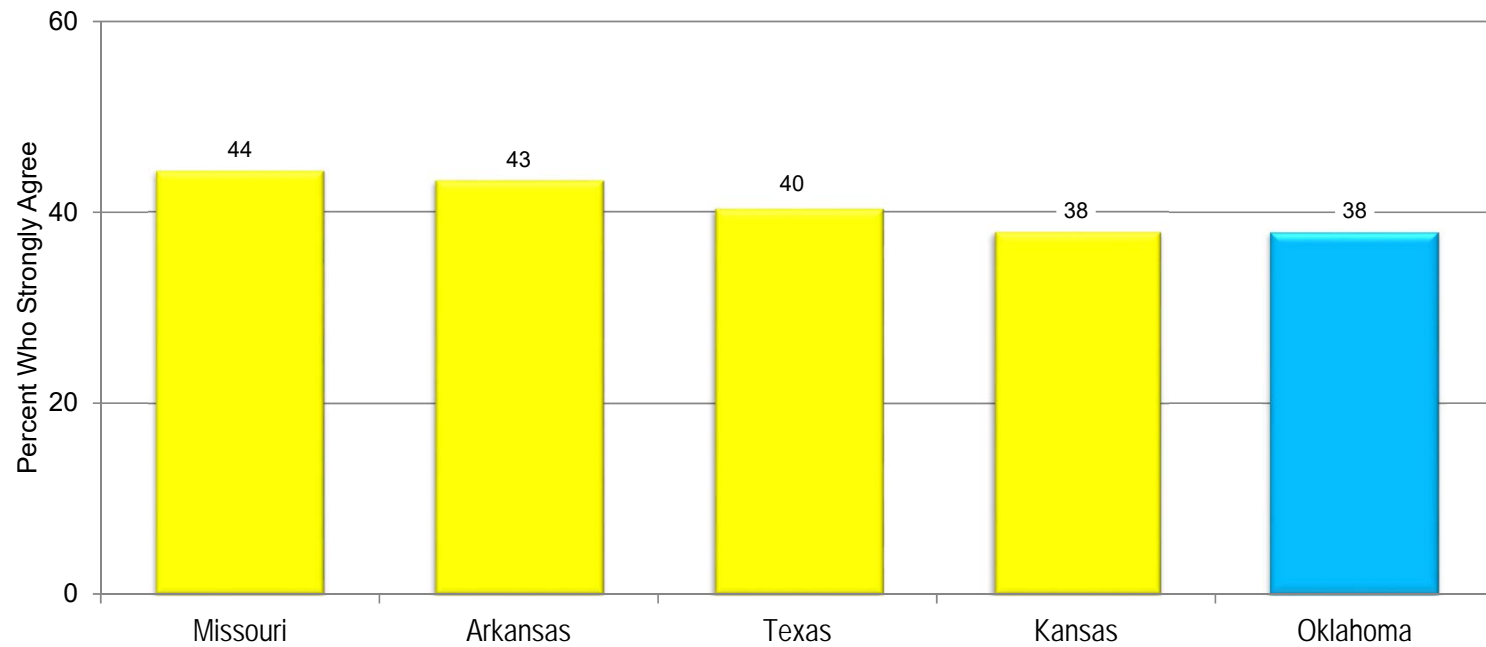
Oklahoma's Image vs. Competition — Experiences



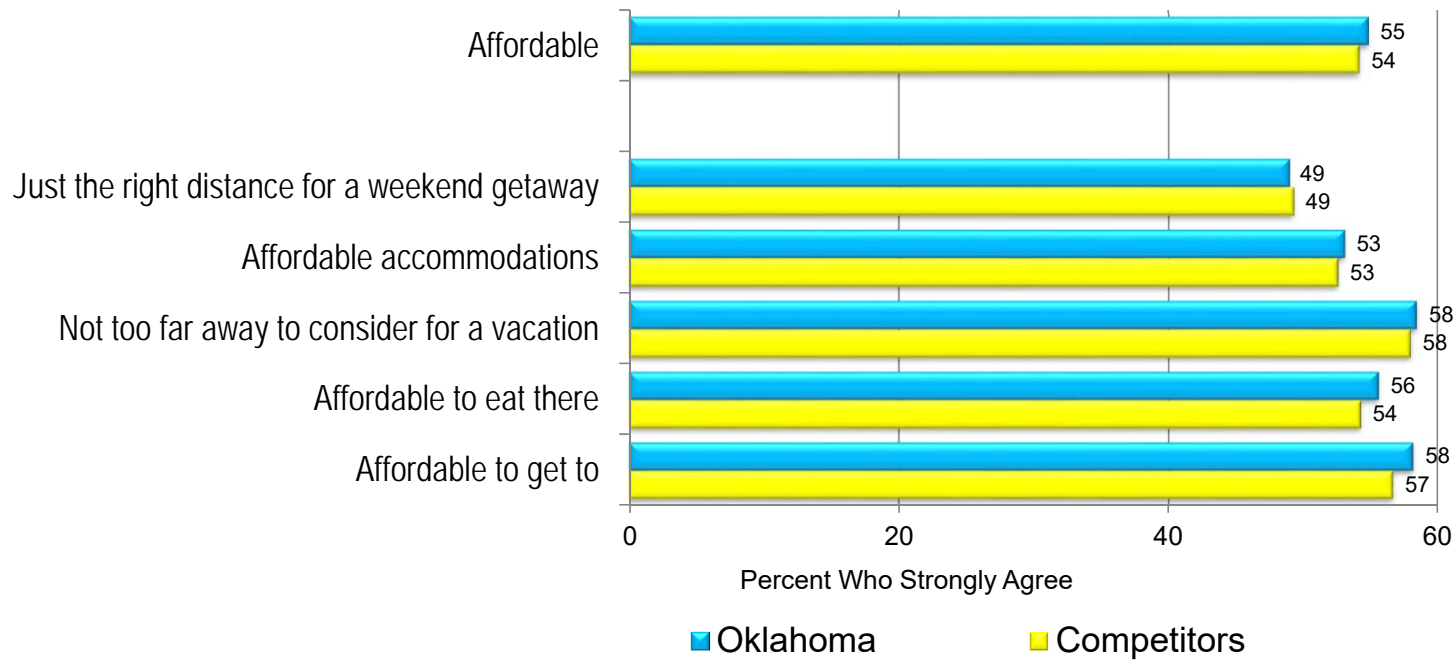
Oklahoma's Image vs. Competition — Climate



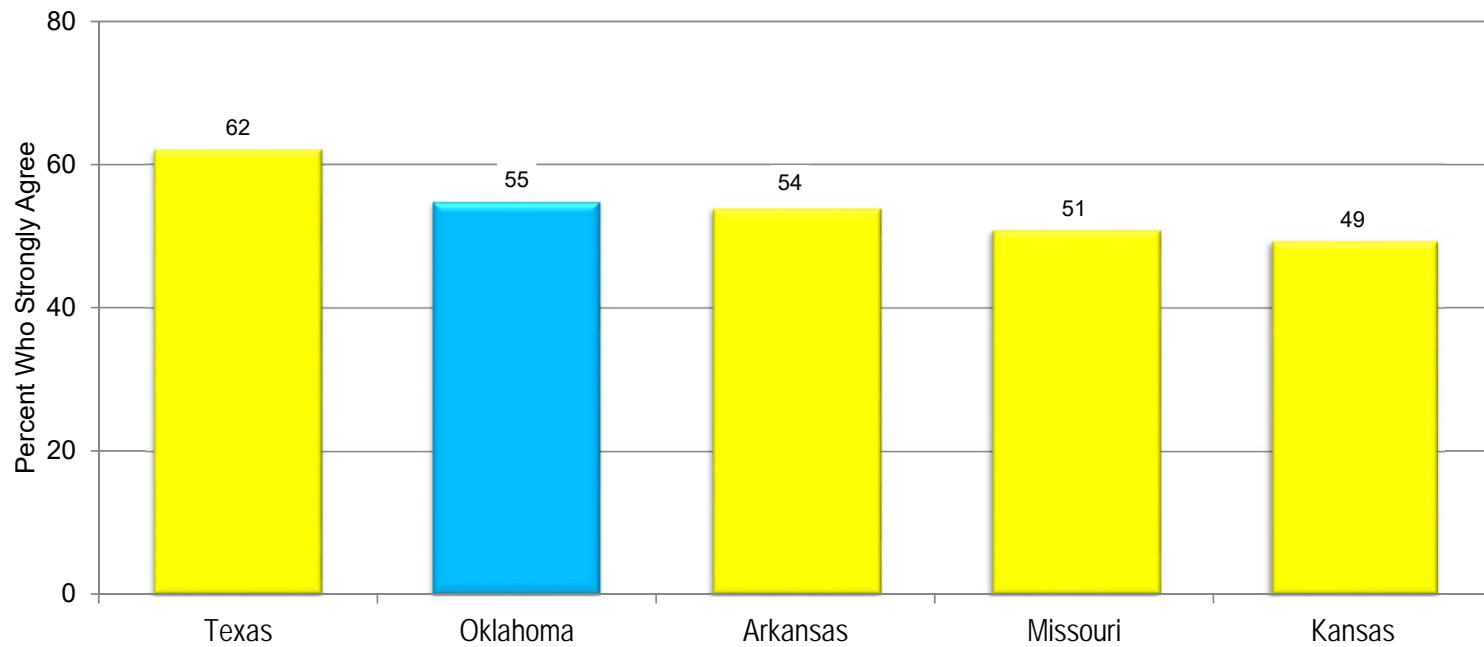
Oklahoma's Image vs. Competition — Climate



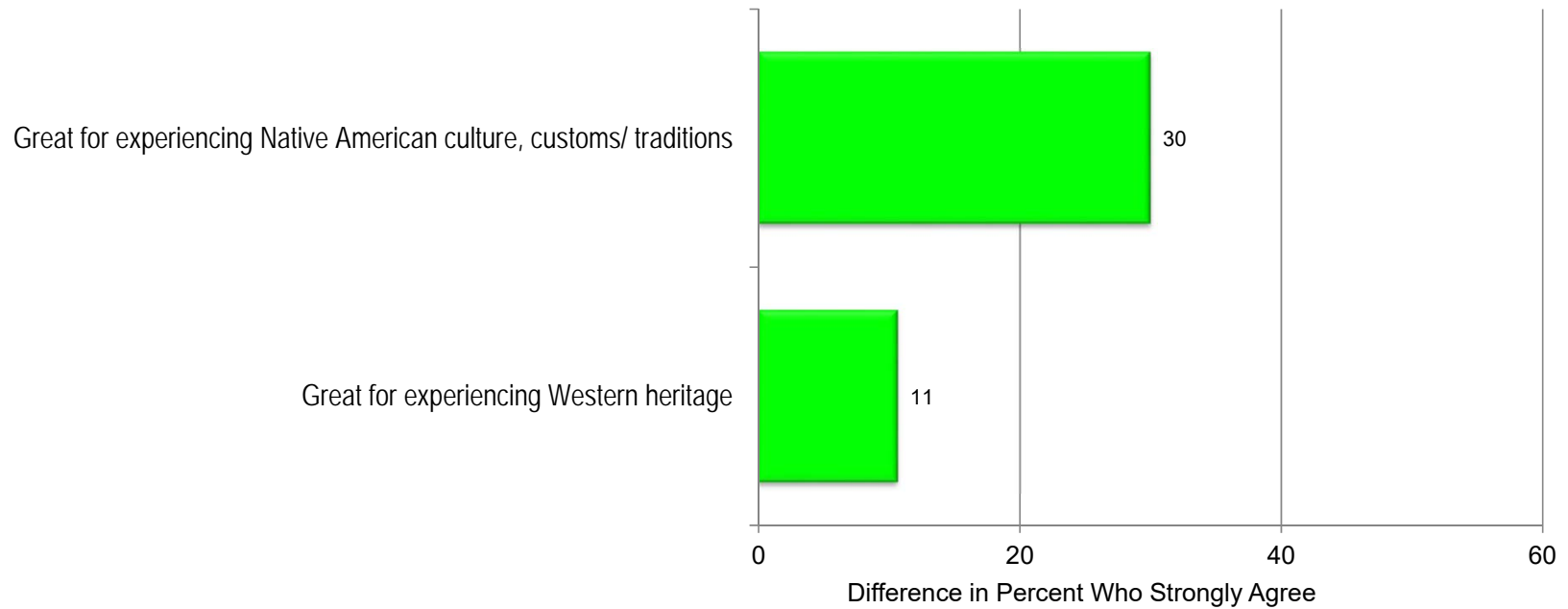
Oklahoma's Image vs. Competition — Affordable



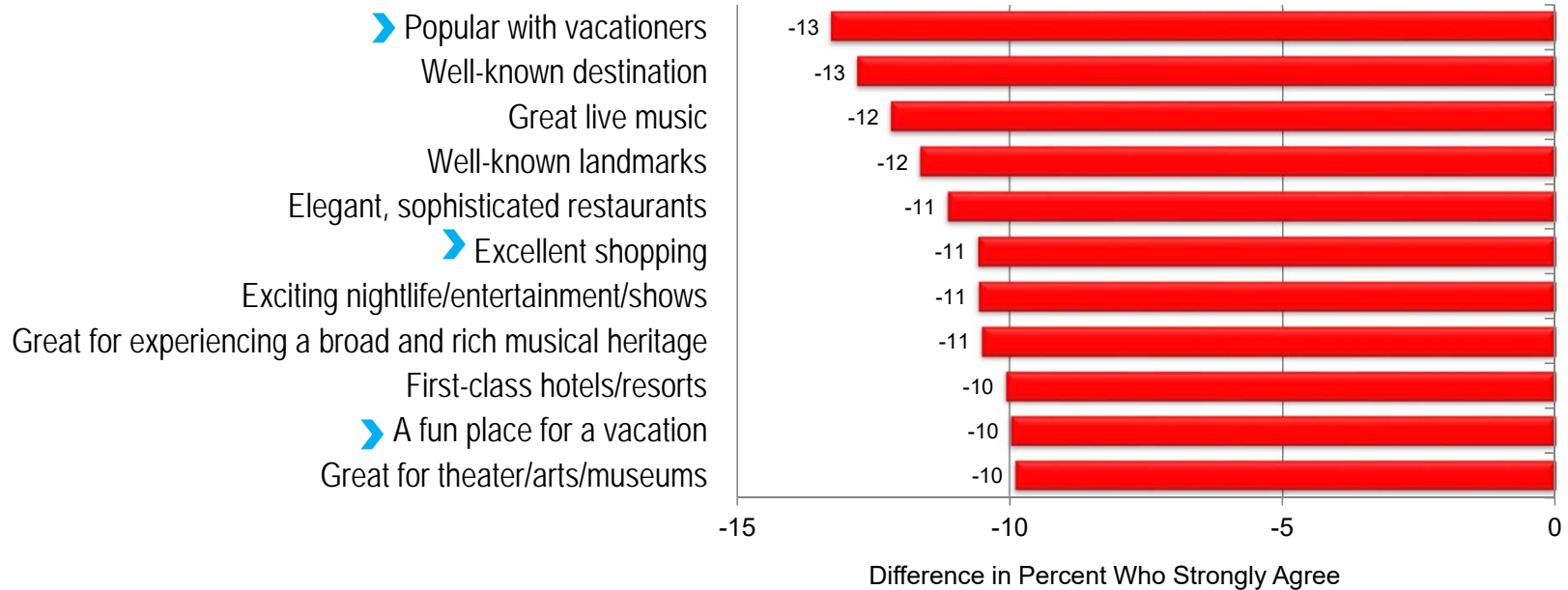
Oklahoma's Image vs. Competition — Affordable



Oklahoma's Image Strengths vs. Competition

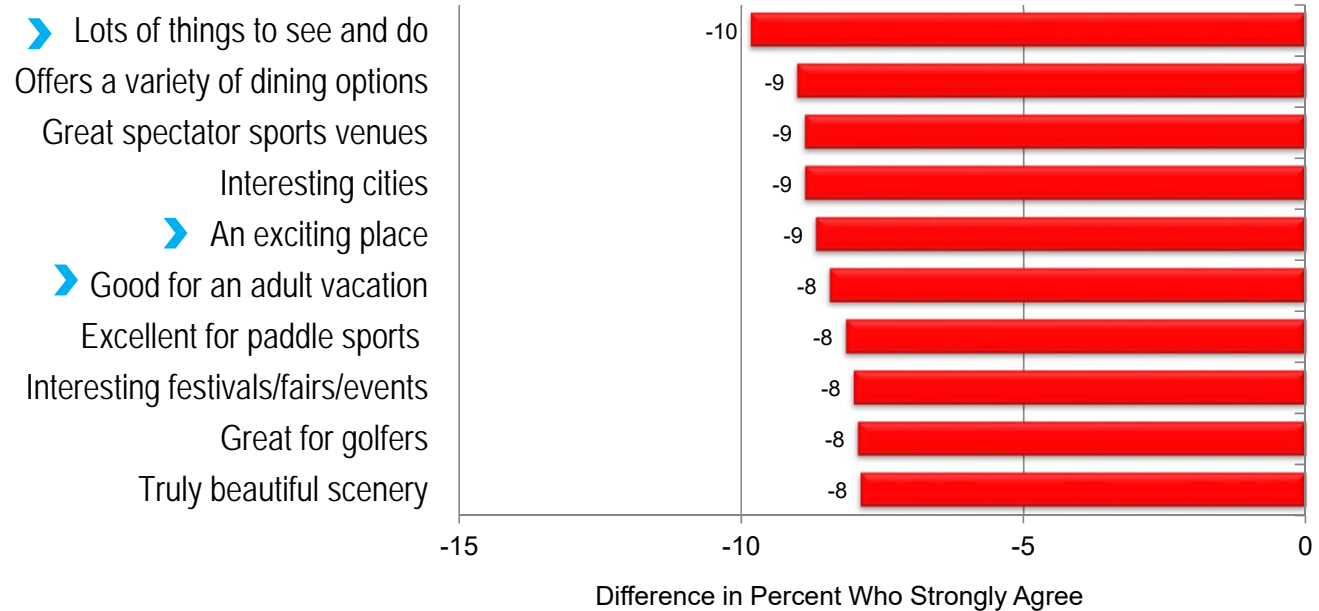


Oklahoma's Image Weaknesses vs. Competition



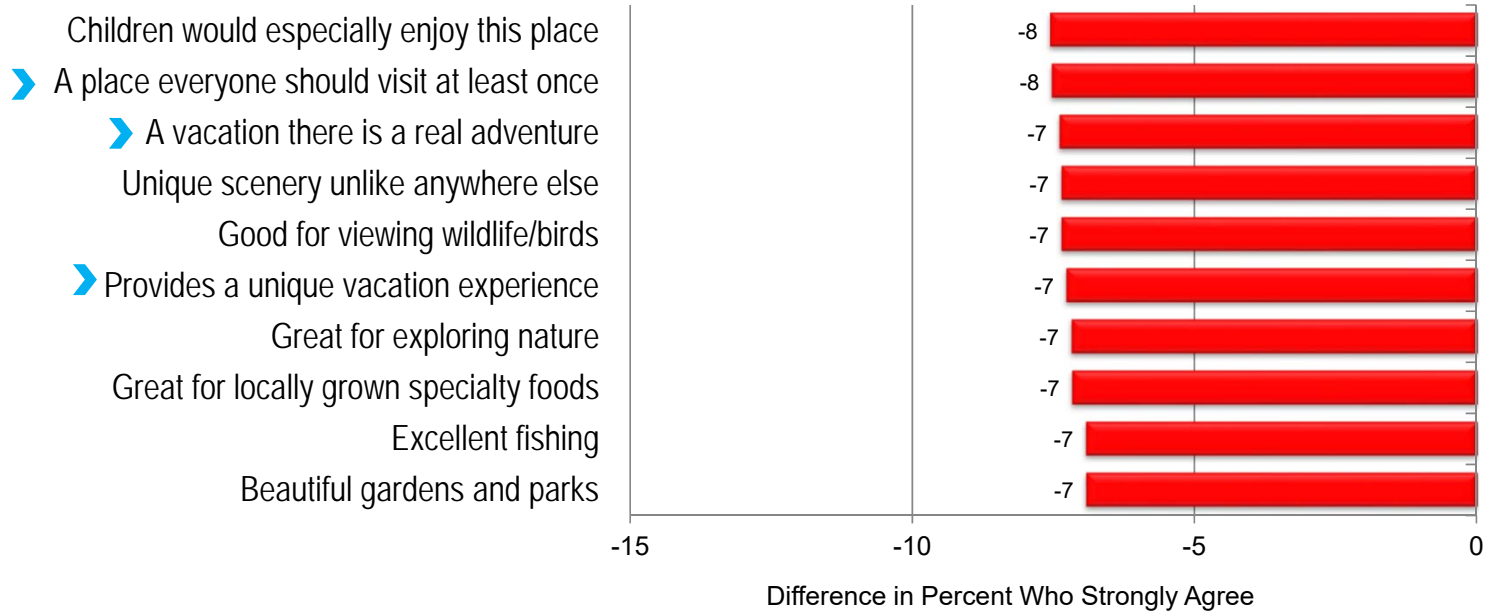
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Competition (Cont'd)



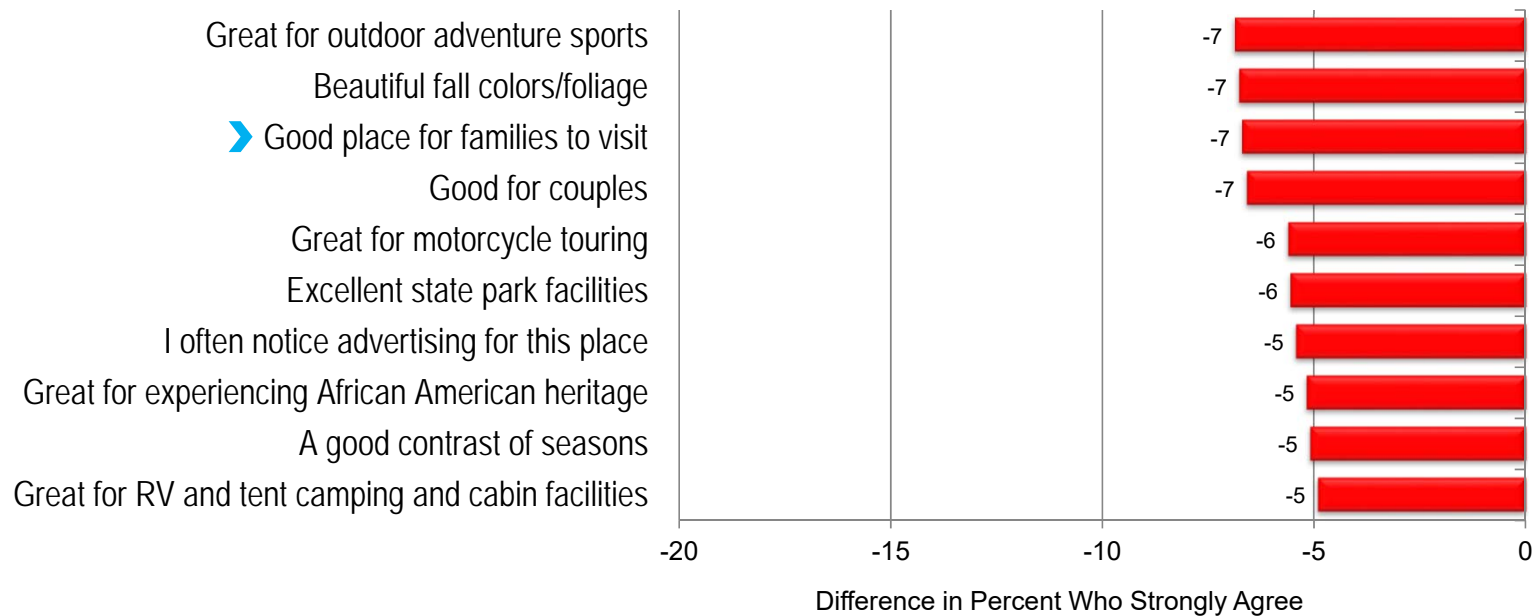
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Competition (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Competition (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers



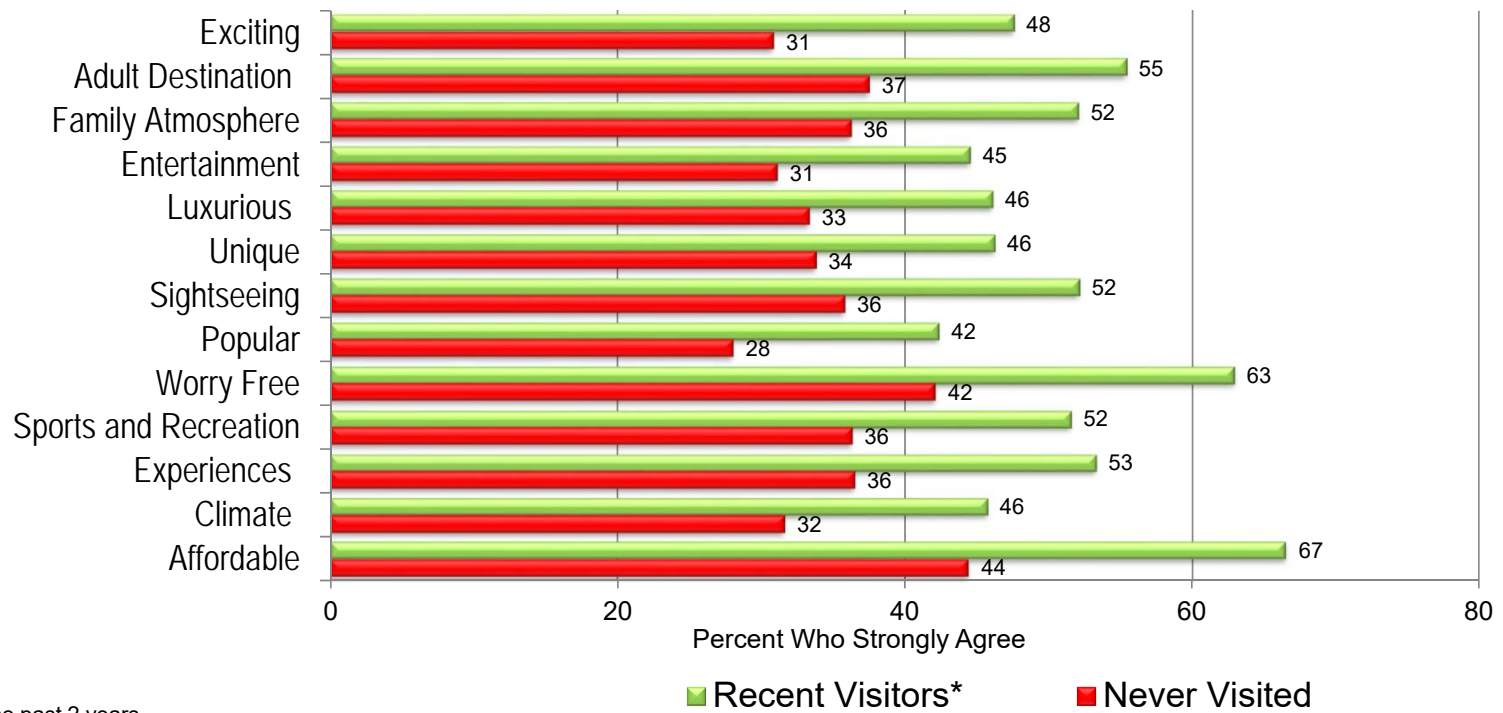
Longwoods
INTERNATIONAL
40 YEARS TOGETHER

Oklahoma's Product Delivery

Product Delivery

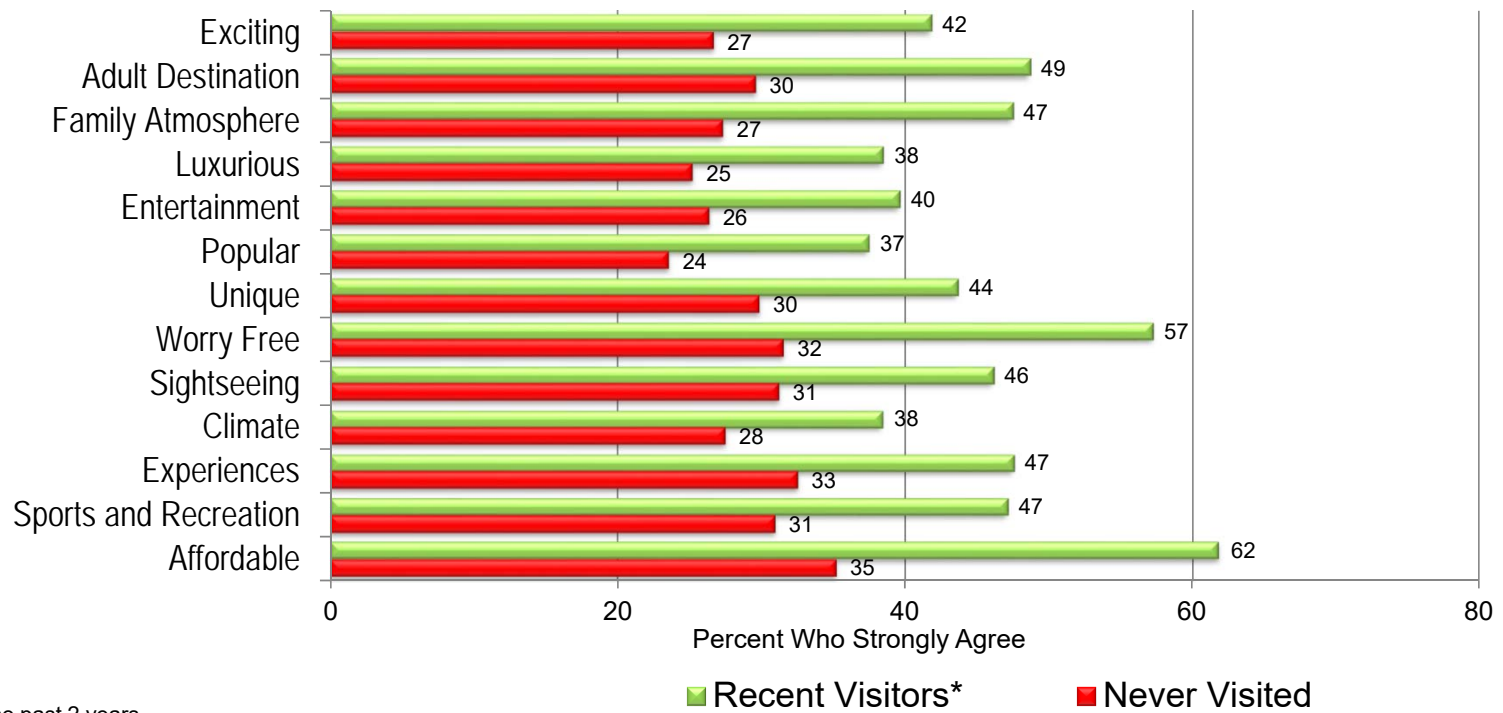
- When we compare the image ratings of people who have not visited Oklahoma recently versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.
- From this analysis we find that people who have experienced Oklahoma recently were especially impressed with:
 - The affordability of Oklahoma.
 - The worry-free experience.
 - Good for adult vacation.
 - Provides a unique vacation experience.
 - Great place for families to visit.
- Among the dimensions evaluated, there no areas where visitors felt Oklahoma failed to live up to expectations.

2018 Oklahoma's Product vs. Image



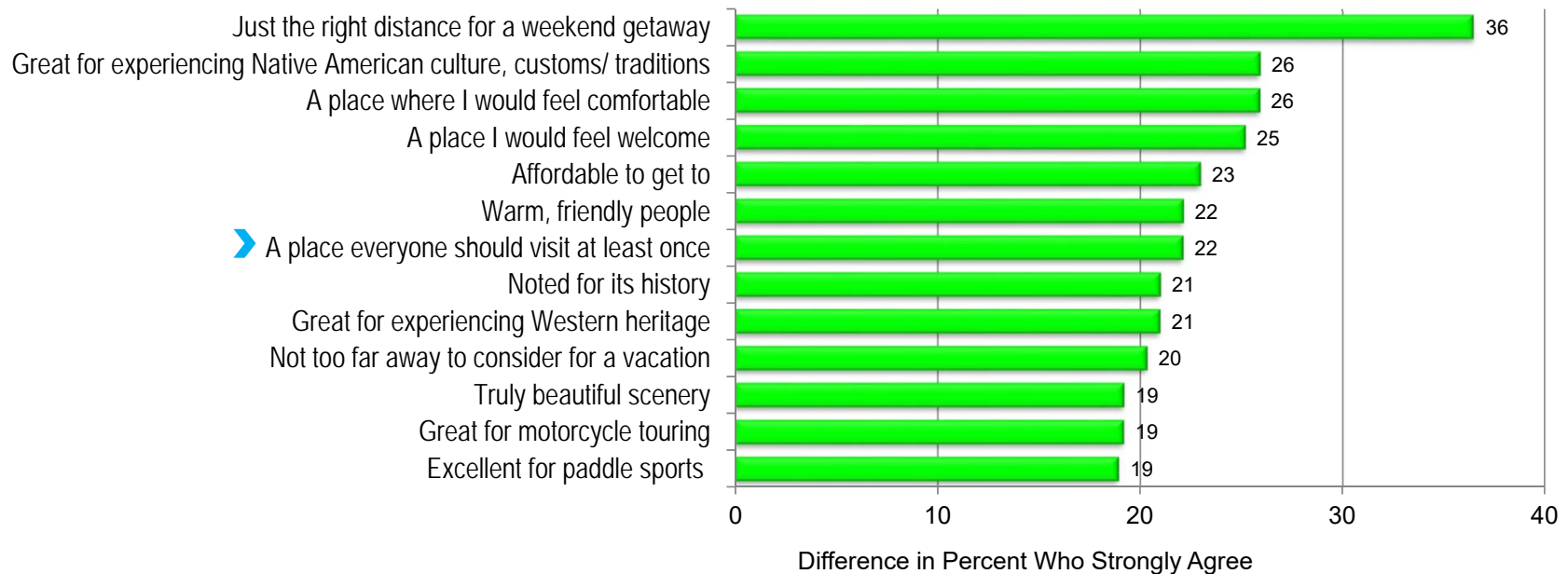
* Visited in the past 2 years

2015 Oklahoma's Product vs. Image



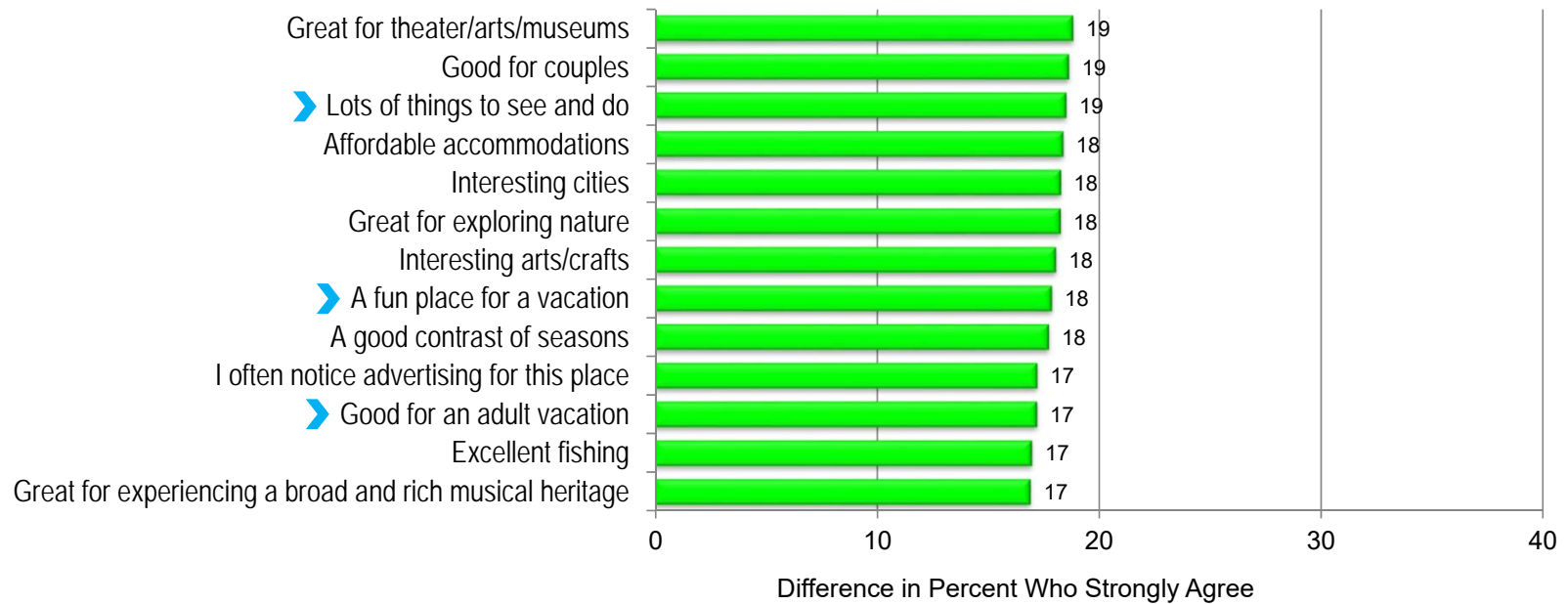
* Visited in the past 2 years

Top Product Strengths vs. Image



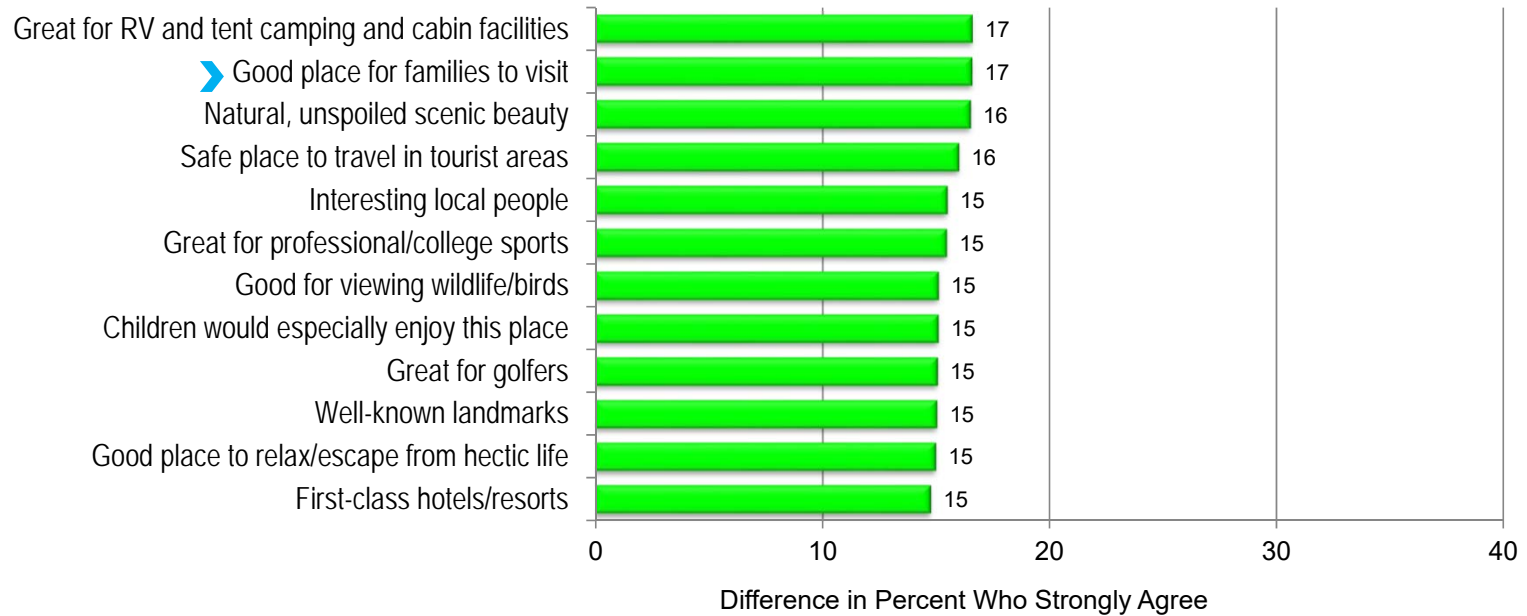
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



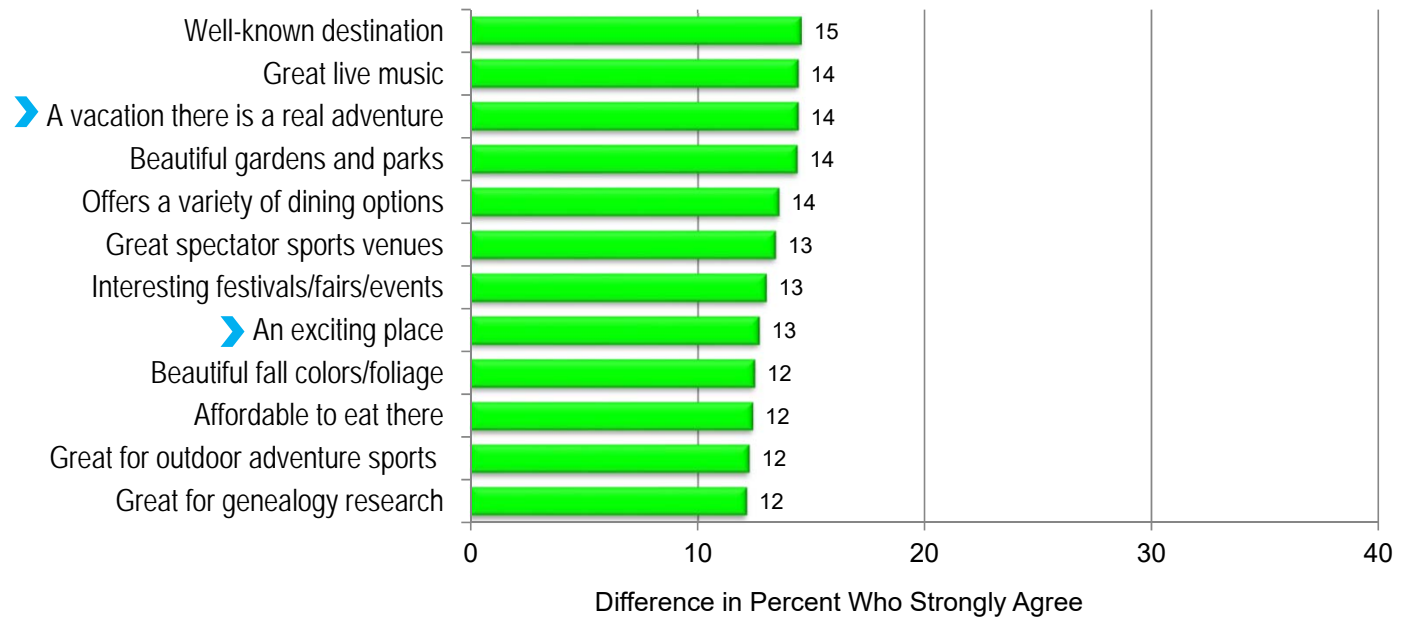
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



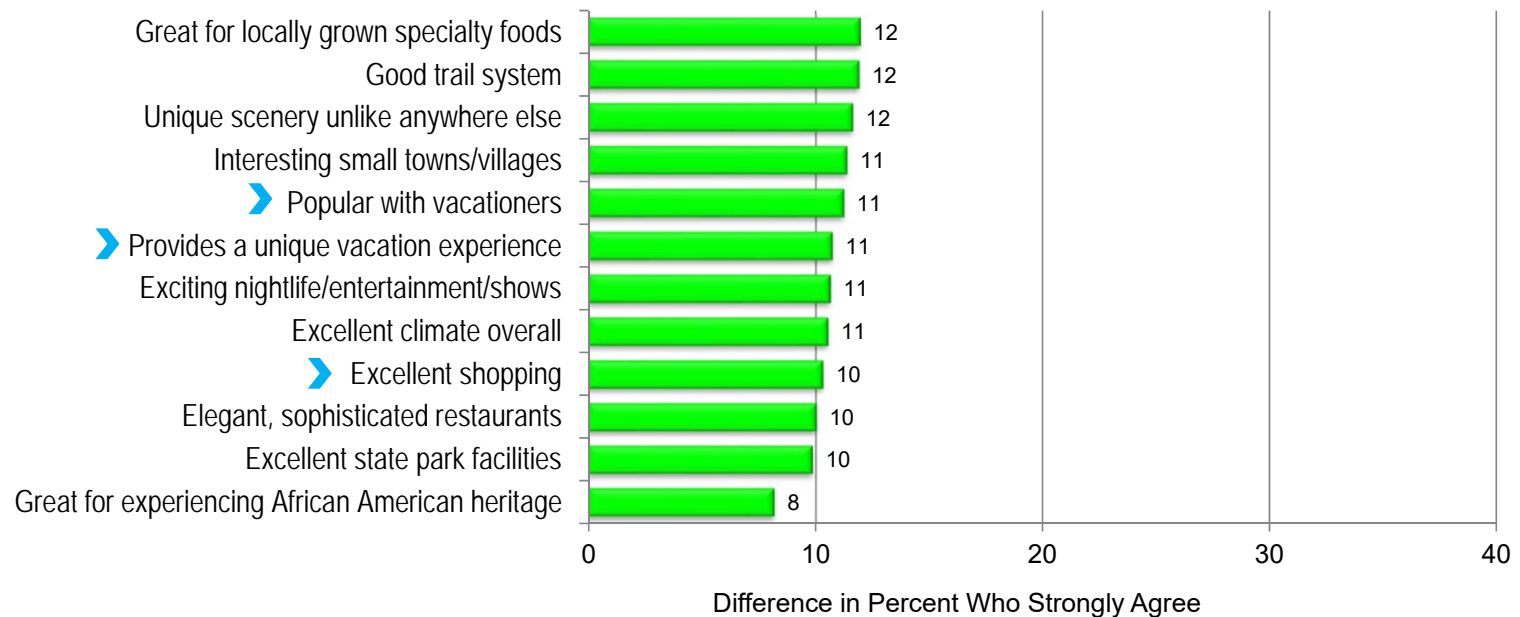
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Strengths vs. Image (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Top Product Weaknesses vs. Image

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



Longwoods
INTERNATIONAL
40 YEARS TOGETHER

Halo Effect on Economic Development Image

Halo Effect Analysis

- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for Oklahoma from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing Oklahoma more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?
- Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.

Halo Effect Analysis

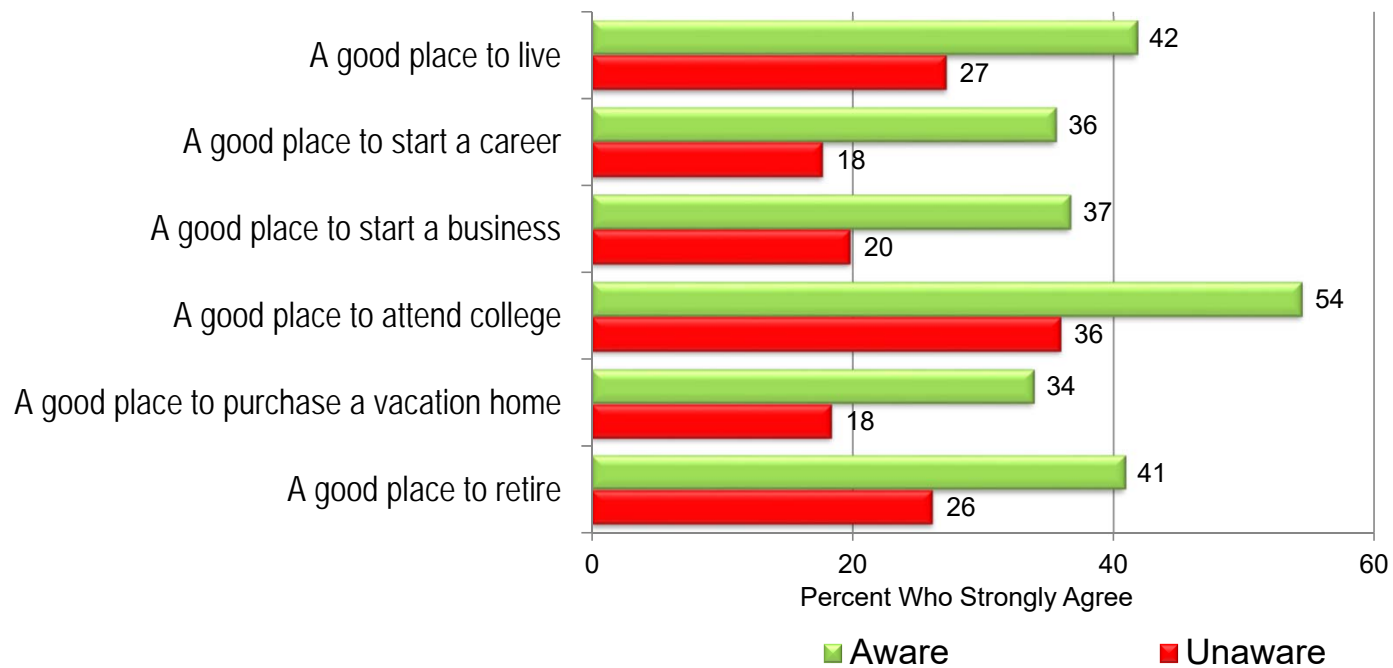
- The research compared consumers' ratings of Oklahoma on economic development image attributes by those who had not seen the campaign or visited Oklahoma with those who did see the tourism ads and/or visited.
- In every case, Oklahoma's tourism advertising and subsequent visitation significantly improved the image of Oklahoma for a wide range of economic development objectives.

Halo Effect Analysis

- Advertising alone created a strong boost in the image of Oklahoma with the top three areas being a good place to attend college (+18%), a good place to start a career (+18%) and a good place to start a business (+17%)
- Actual visitation produced a positive, albeit it not as strong an effect on people's image of Oklahoma on the economic development "indicators":
 - Strongest lift on the "attending college" attribute.
- Advertising was a stronger influence than past visitation on boosting Oklahoma's image.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Oklahoma.
 - The boost seen from both advertising and visitation was just shy of the combination of both groups.

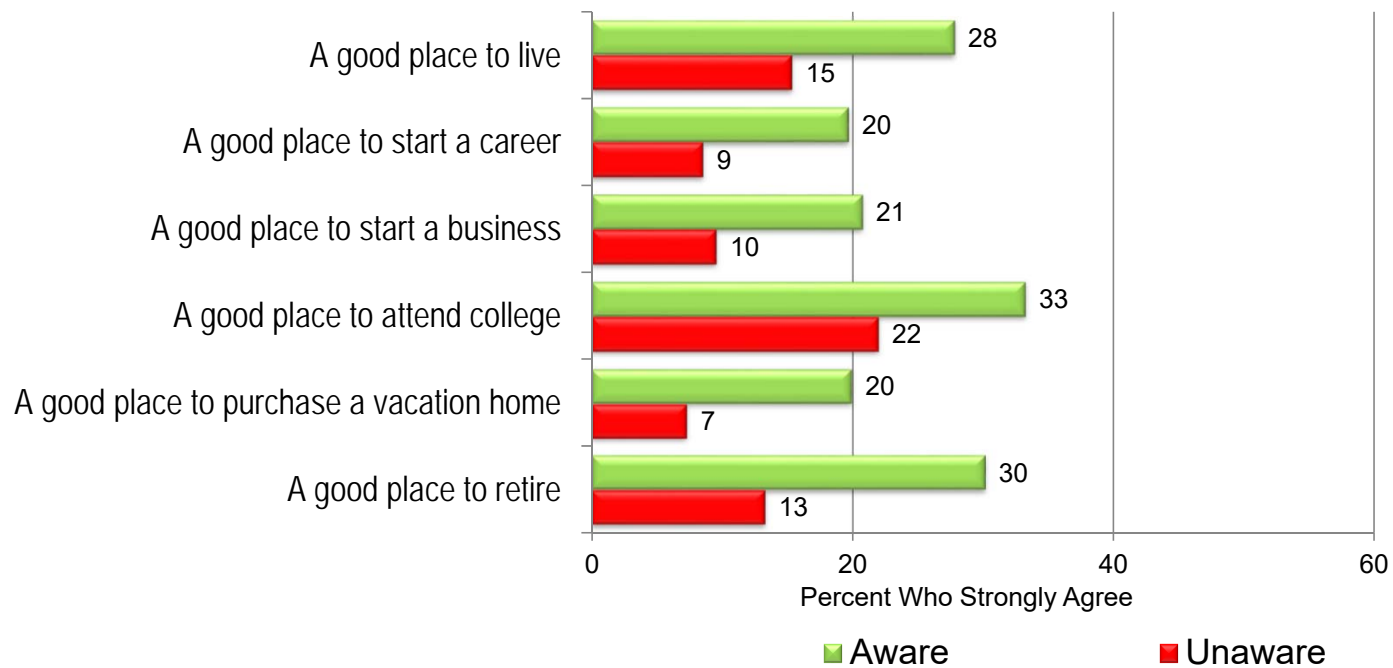
2018 Impact of *Tourism Ad Awareness* on Oklahoma's Economic Development Image

Base: Out of State Residents



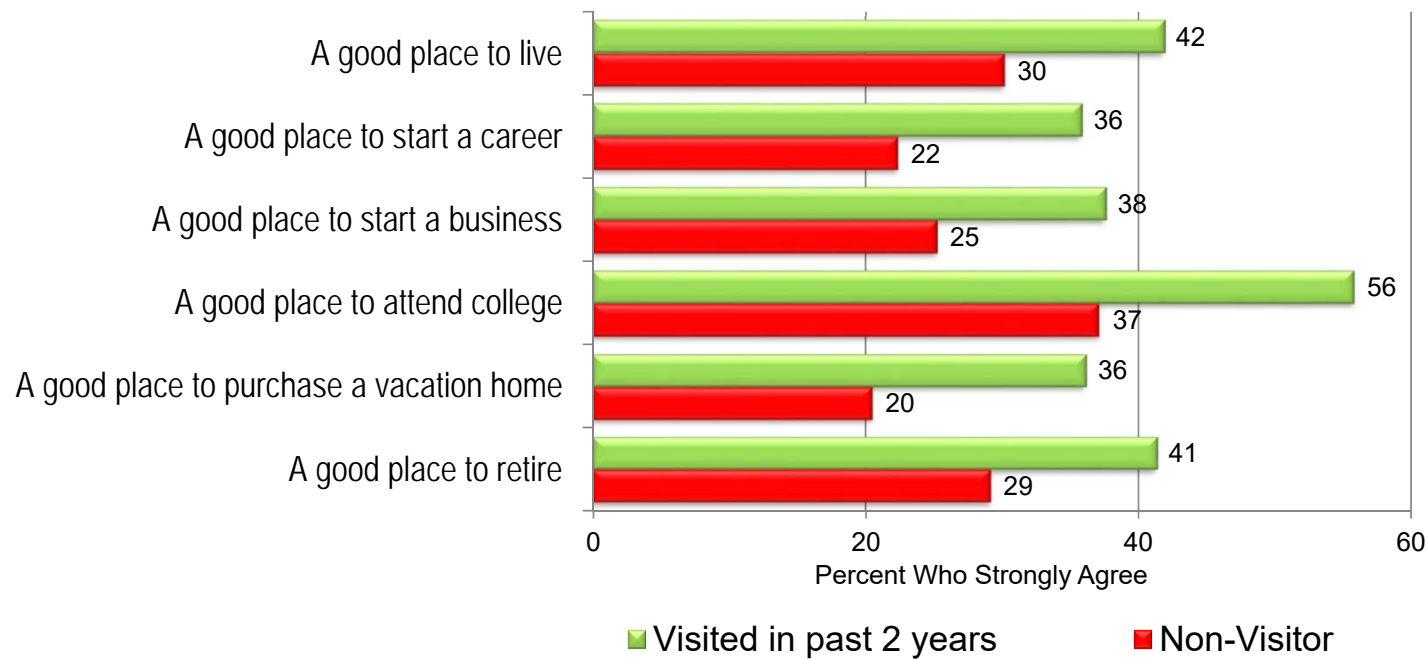
2016 Impact of *Tourism Ad Awareness* on Oklahoma's Economic Development Image

Base: Out of State Residents



2018 Impact of *Visitation* on Oklahoma's Economic Development Image

Base: Out of State Residents



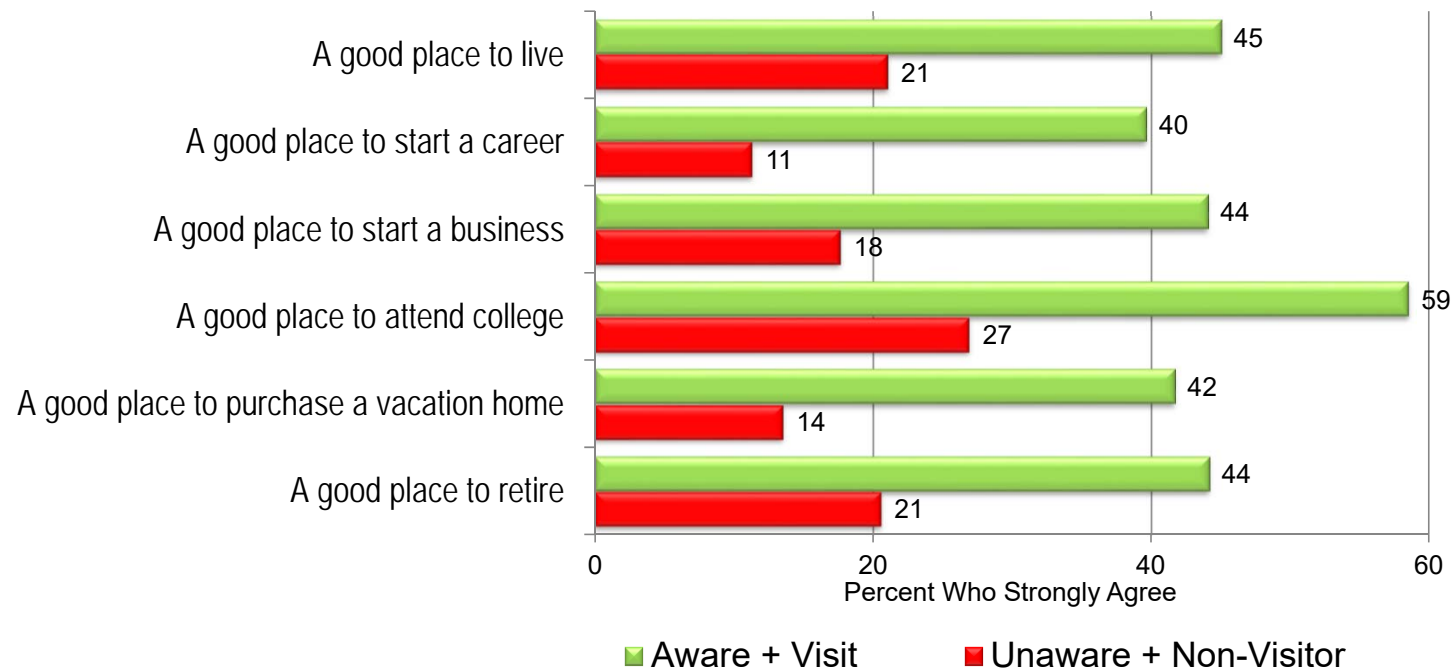
2016 Impact of *Visitation* on Oklahoma's Economic Development Image

Base: Out of State Residents



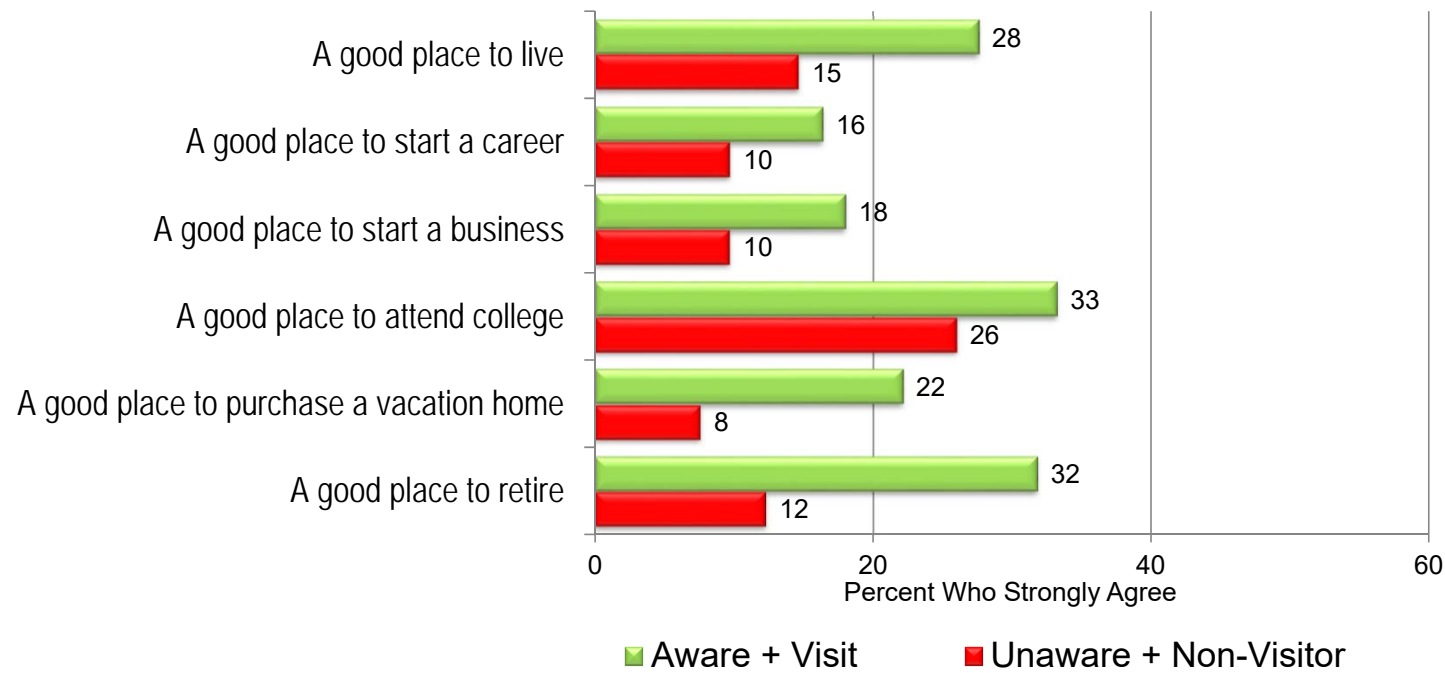
2018 Impact of *Ad Awareness plus Visitation* on Oklahoma's Economic Development Image

Base: Out of State Residents



2016 Impact of *Ad Awareness plus Visitation* on Oklahoma's Economic Development Image

Base: Out of State Residents



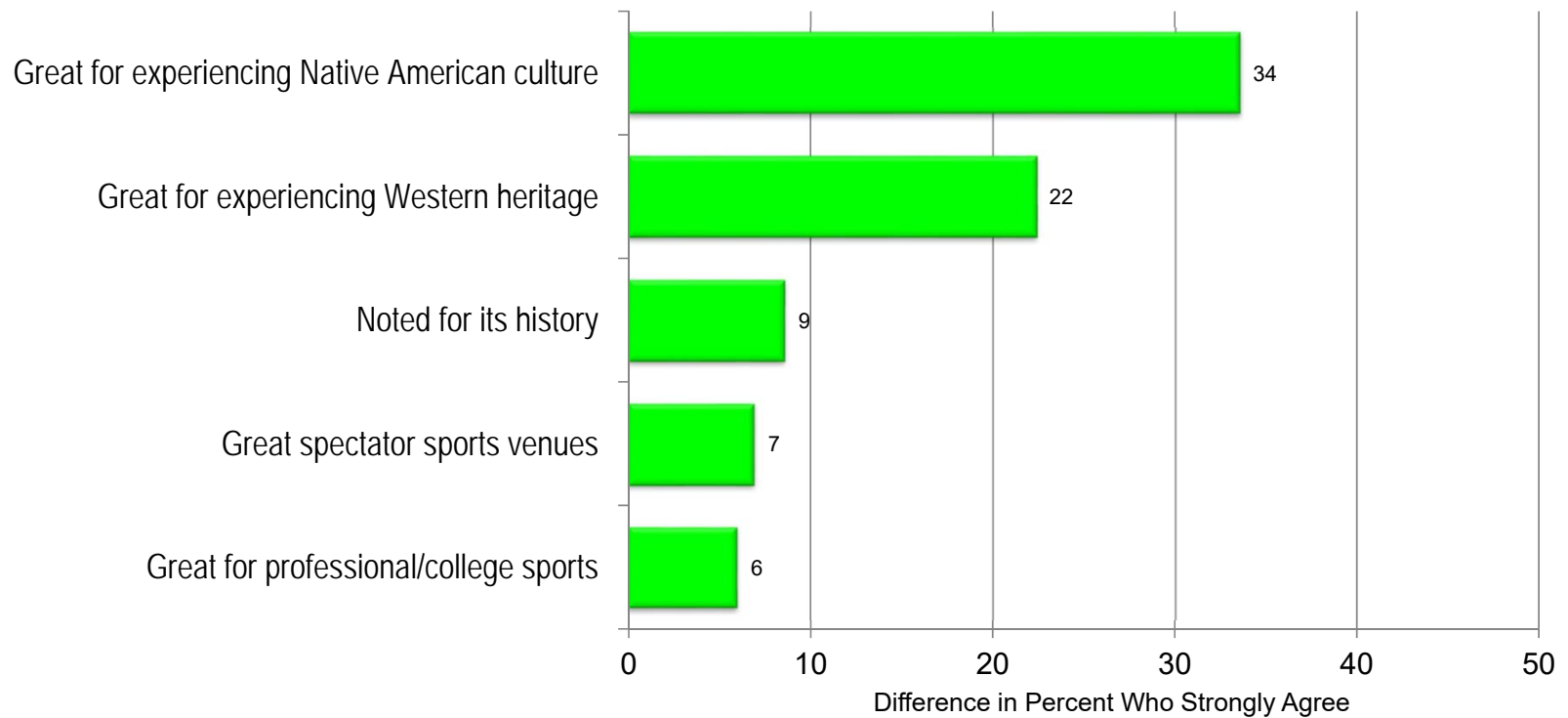


**Appendix: Oklahoma's
Image Strengths &
Weaknesses vs.
Individual Competitors**

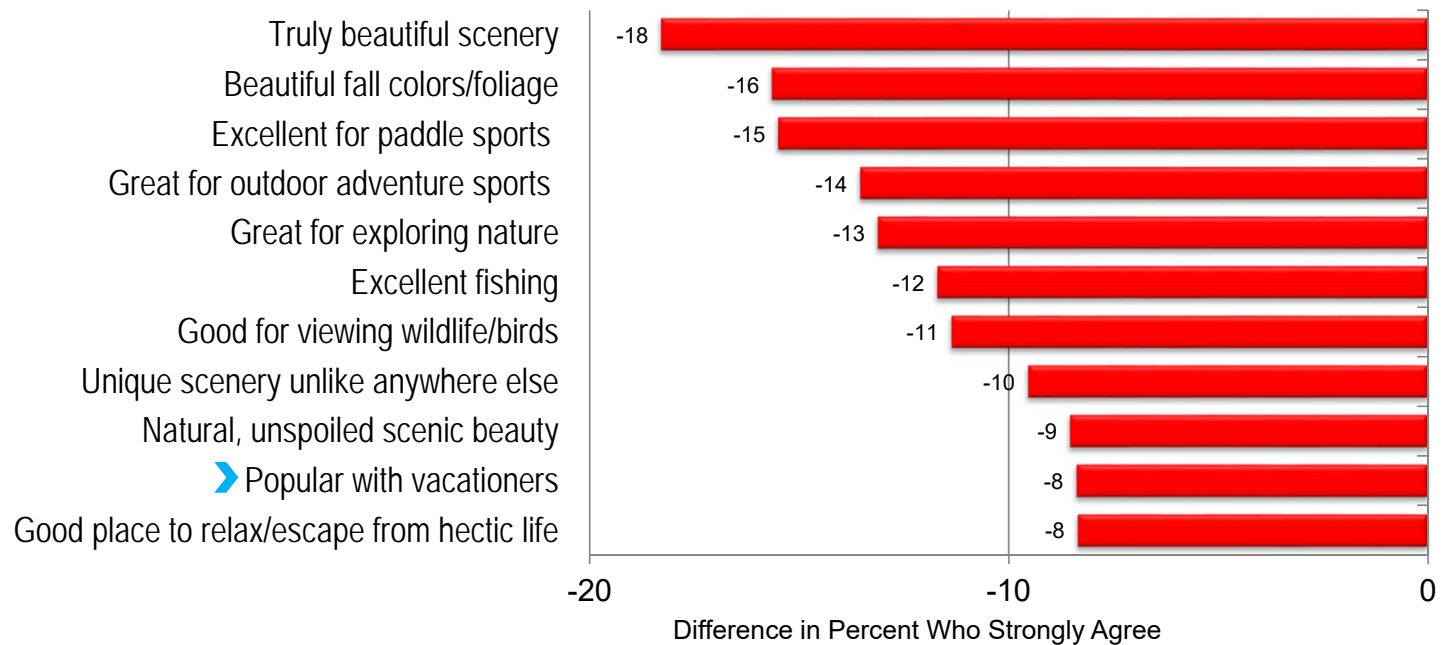
Image of the Competition

- What helps Oklahoma distinguish itself from its competitors is its Native American culture and experiences. This is an area where Oklahoma outranked all of its competitors.
- Among the destinations evaluated in this study, Texas emerged as one of the image leaders, having the advantage over Oklahoma and the others for unique food and culture, sightseeing, fine dining/luxury accommodations, shopping, events, theater and accessibility.
 - Texas outranked Oklahoma on all attributes minus Native American Culture.
- Kansas on the other hand, was at the bottom of the pack. Oklahoma scored better than Kansas on all the attributes tested.
- In addition to Native American culture and Western heritage, Oklahoma also outranked Arkansas on sports venues and professional/college sports.

Oklahoma's Image Strengths vs. Arkansas

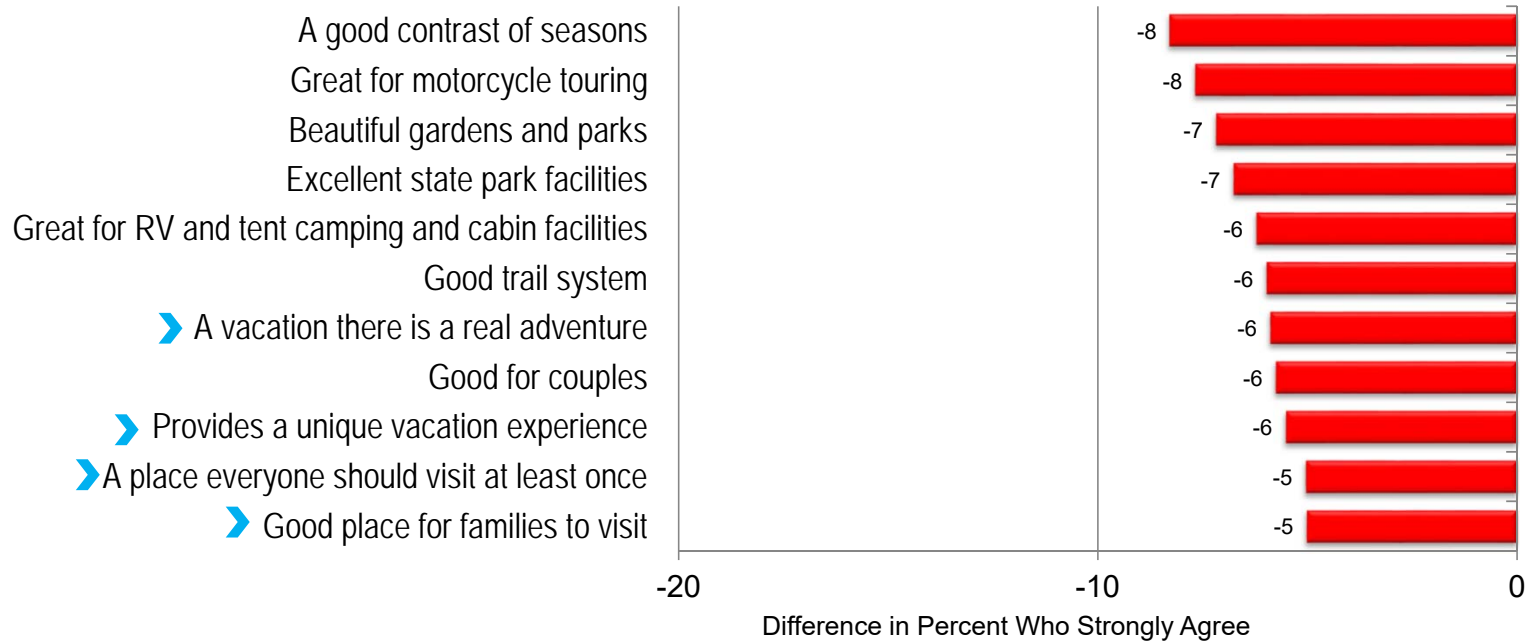


Oklahoma's Image Weaknesses vs. Arkansas



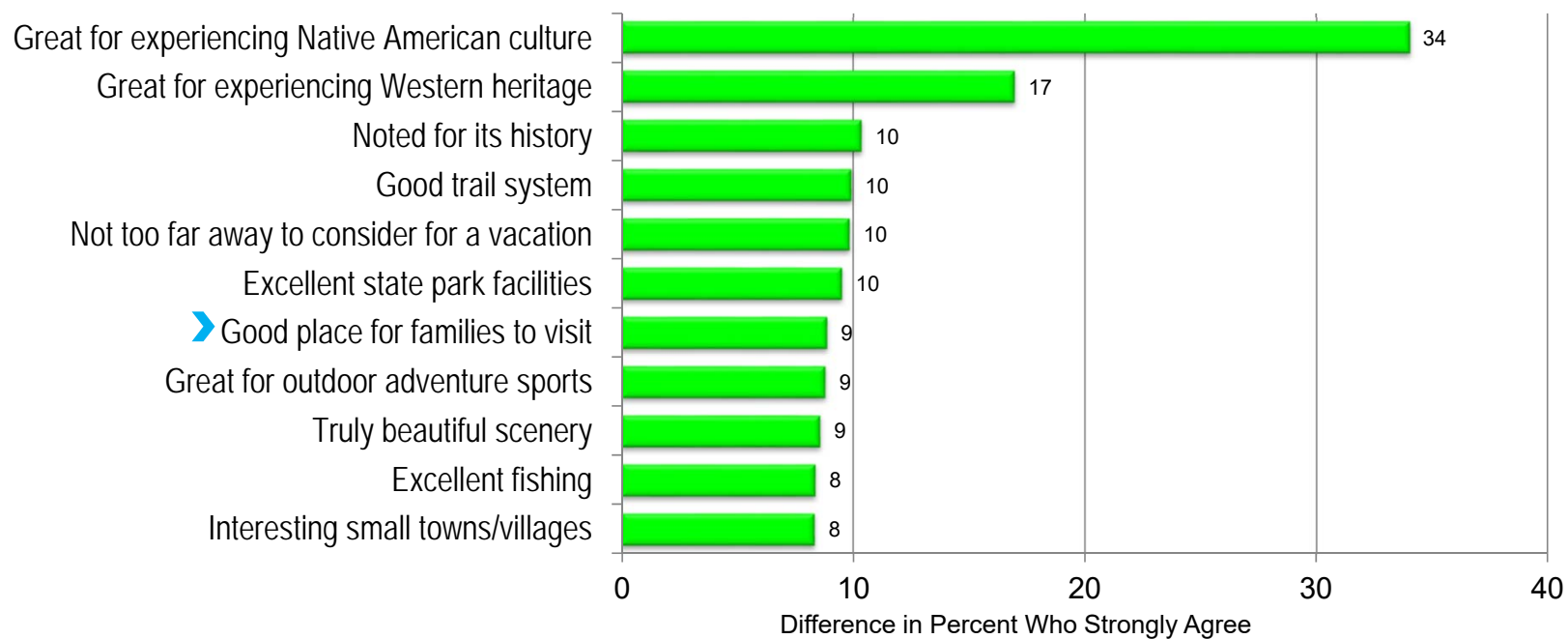
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Arkansas (Cont'd)



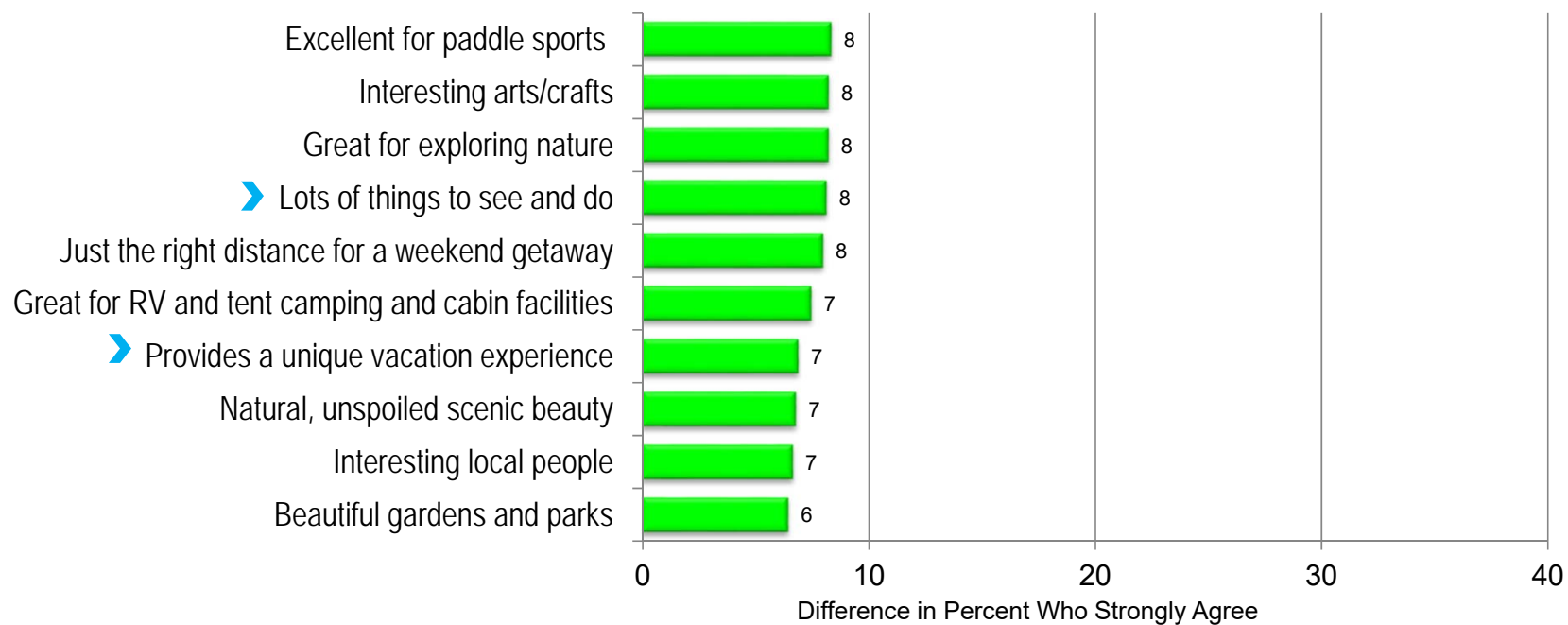
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Strengths vs. Kansas



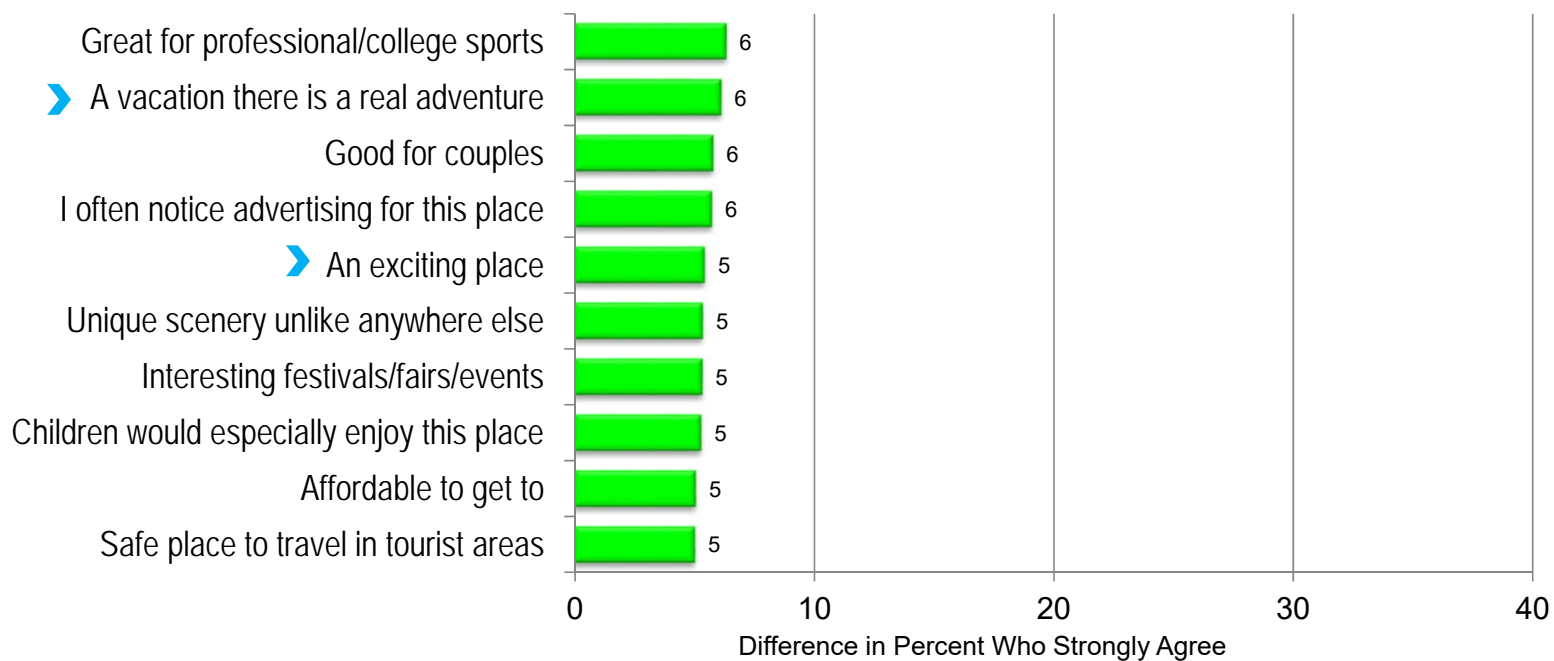
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Strengths vs. Kansas (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Strengths vs. Kansas (Cont'd)

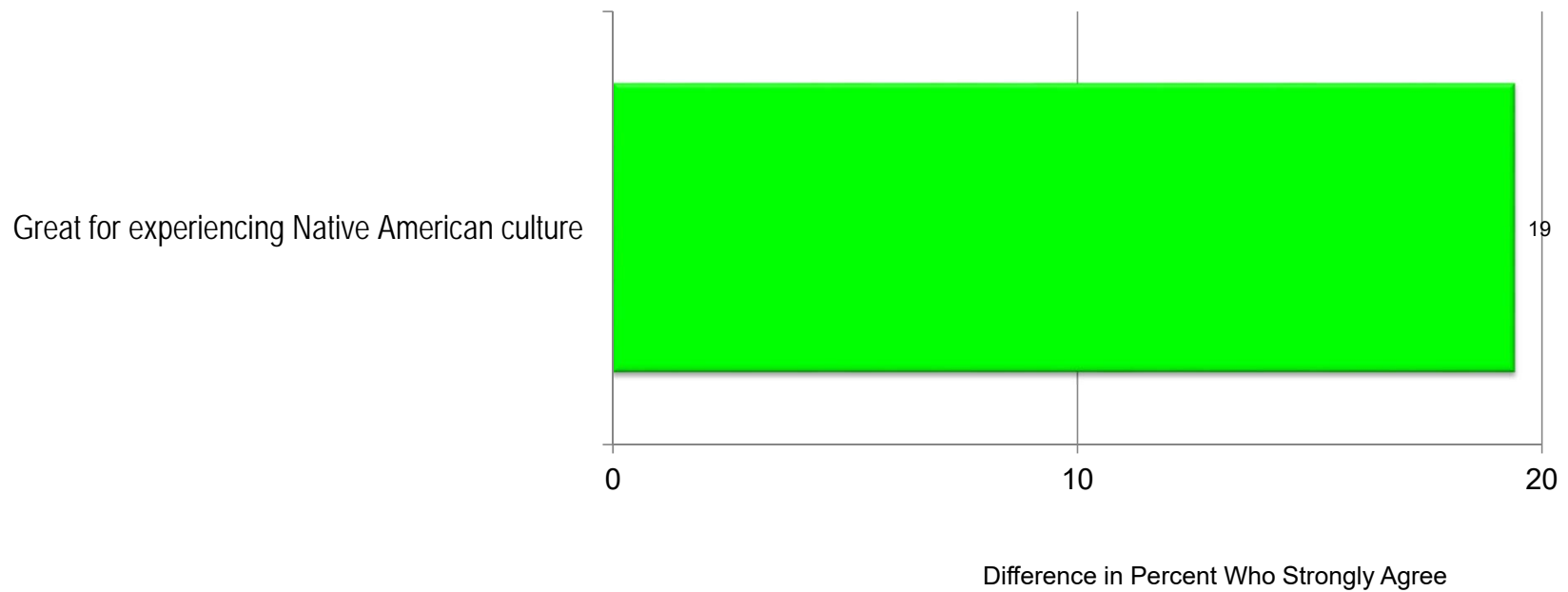


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Kansas

**THERE WERE NO SIGNIFICANT
IMAGE WEAKNESSES VS.
KANSAS**

Oklahoma's Image Strengths vs. Texas



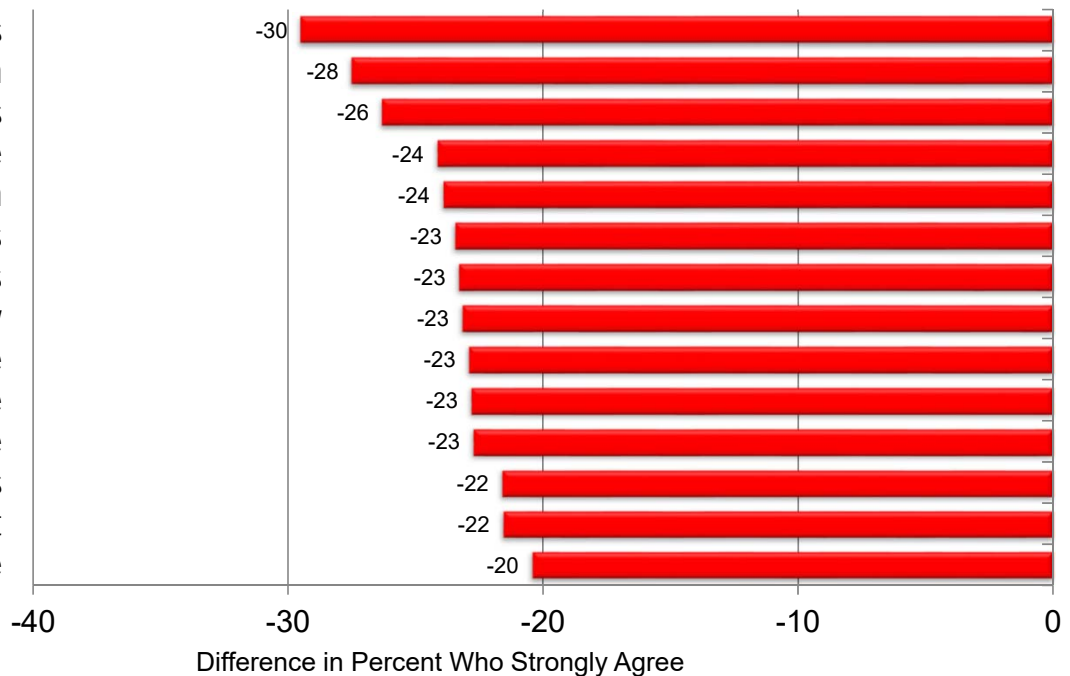
Oklahoma's Image Weaknesses vs. Texas



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

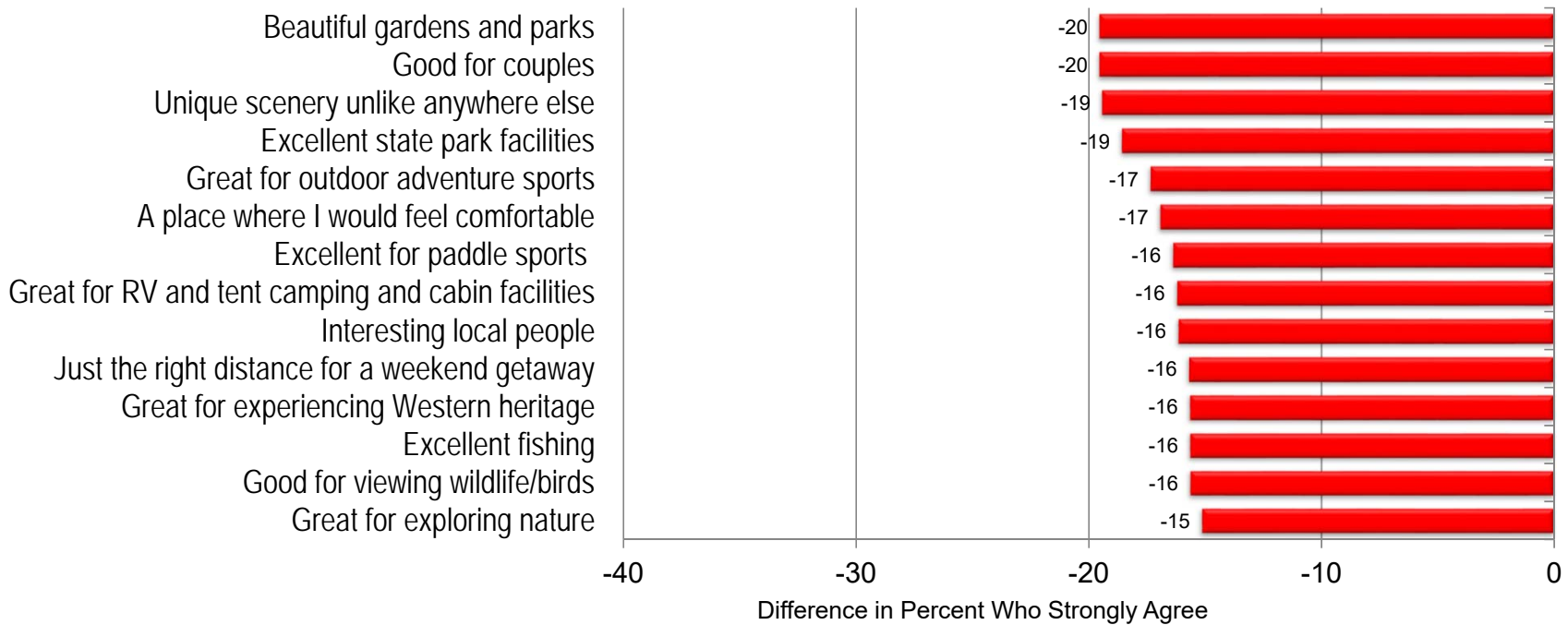
Oklahoma's Image Weaknesses vs. Texas (Cont'd)

- Offers a variety of dining options
 - A fun place for a vacation
- Interesting festivals/fairs/events
- A vacation there is a real adventure
 - Good for an adult vacation
- Great for golfers
- Great for professional/college sports
- Noted for its history
- A place everyone should visit at least once
 - Provides a unique vacation experience
- Children would especially enjoy this place
- Great for locally grown specialty foods
 - Good place for families to visit
- I often notice advertising for this place

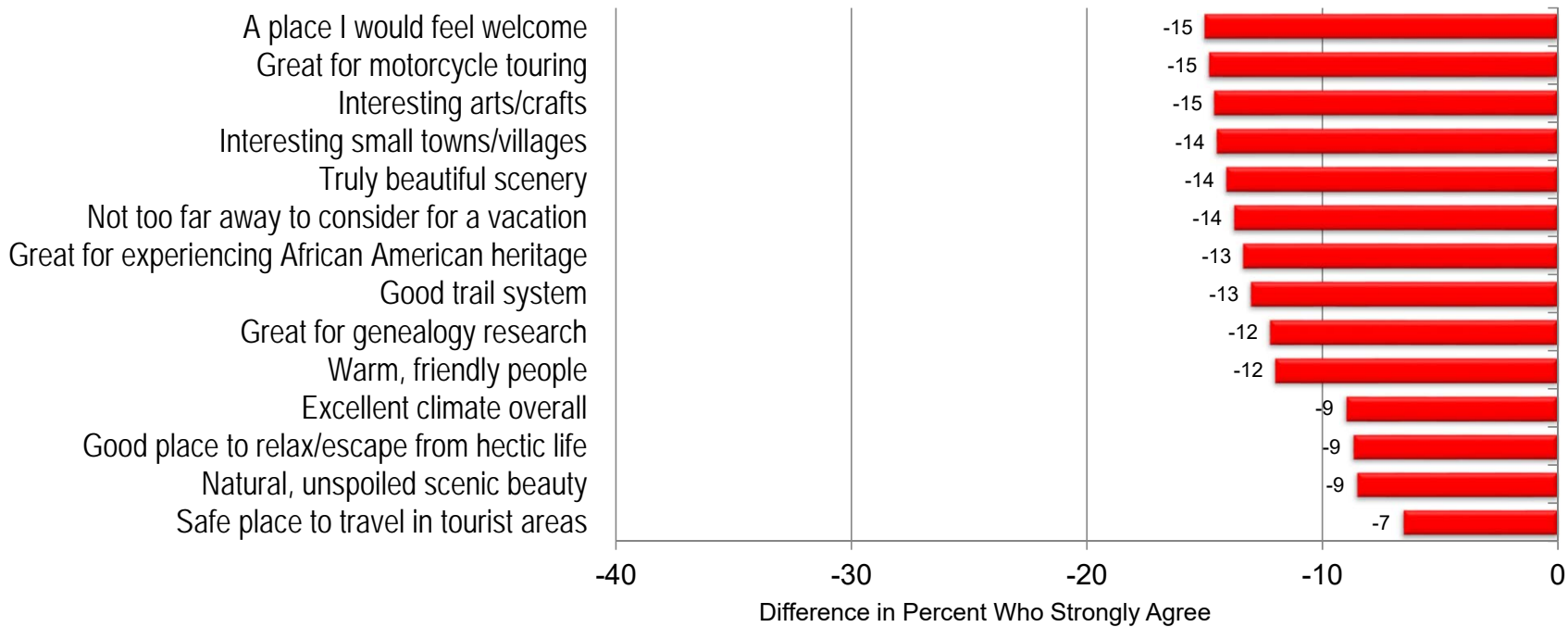


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

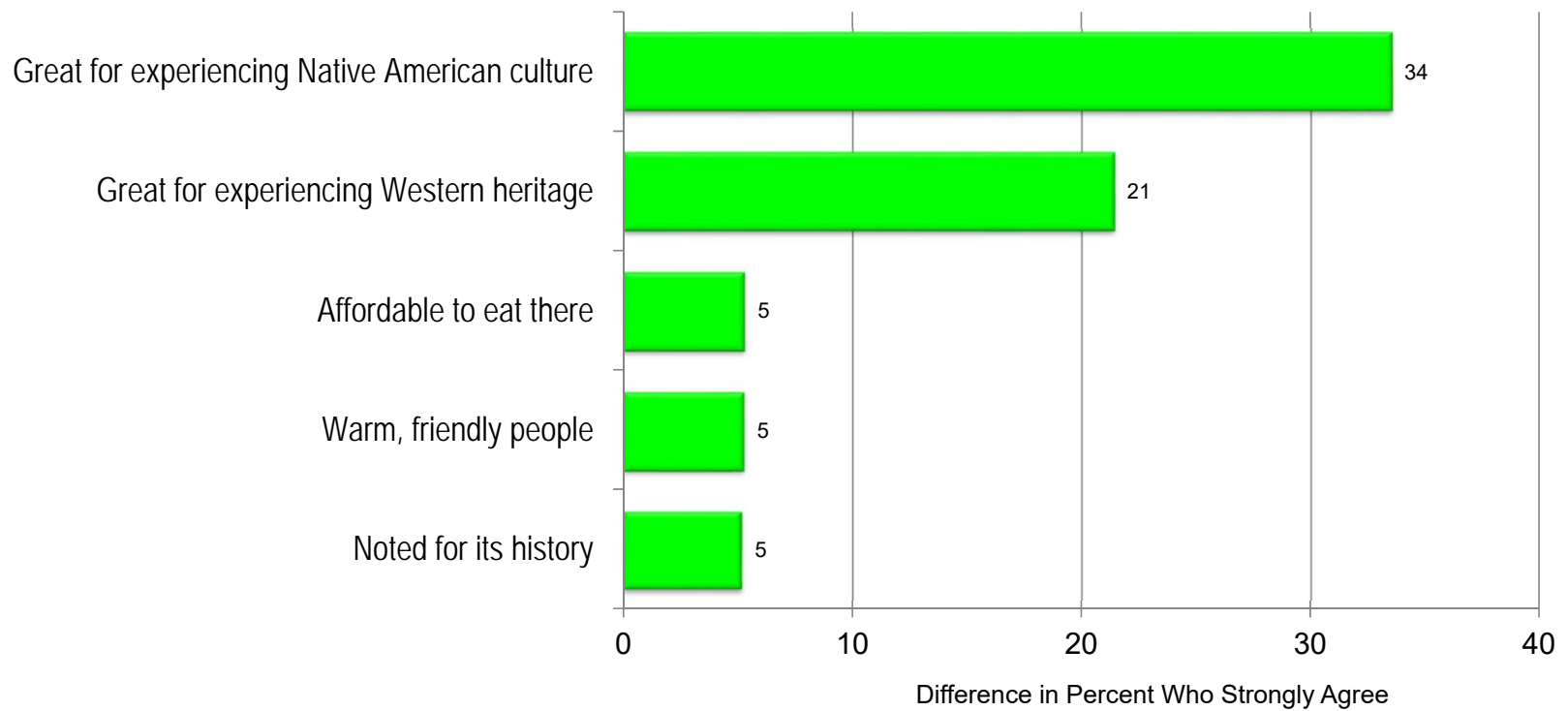
Oklahoma's Image Weaknesses vs. Texas (Cont'd)



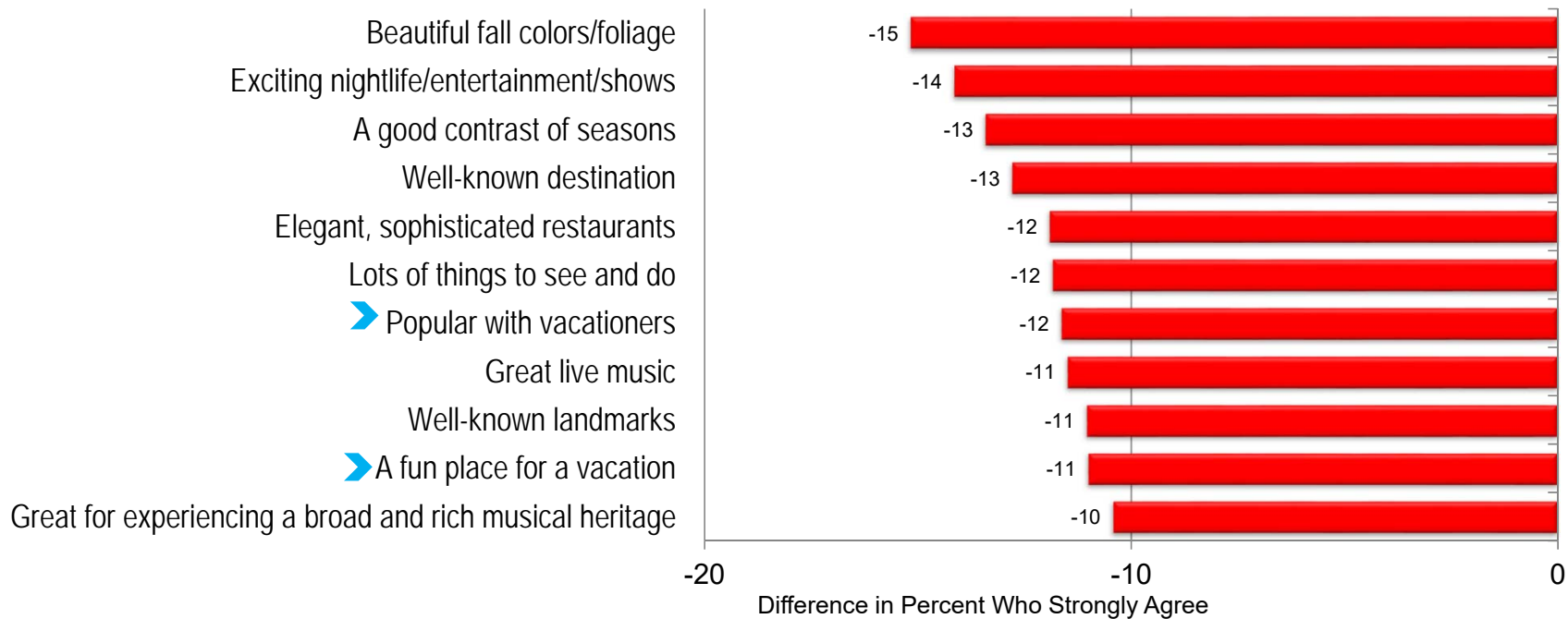
Oklahoma's Image Weaknesses vs. Texas (Cont'd)



Oklahoma's Image Strengths vs. Missouri

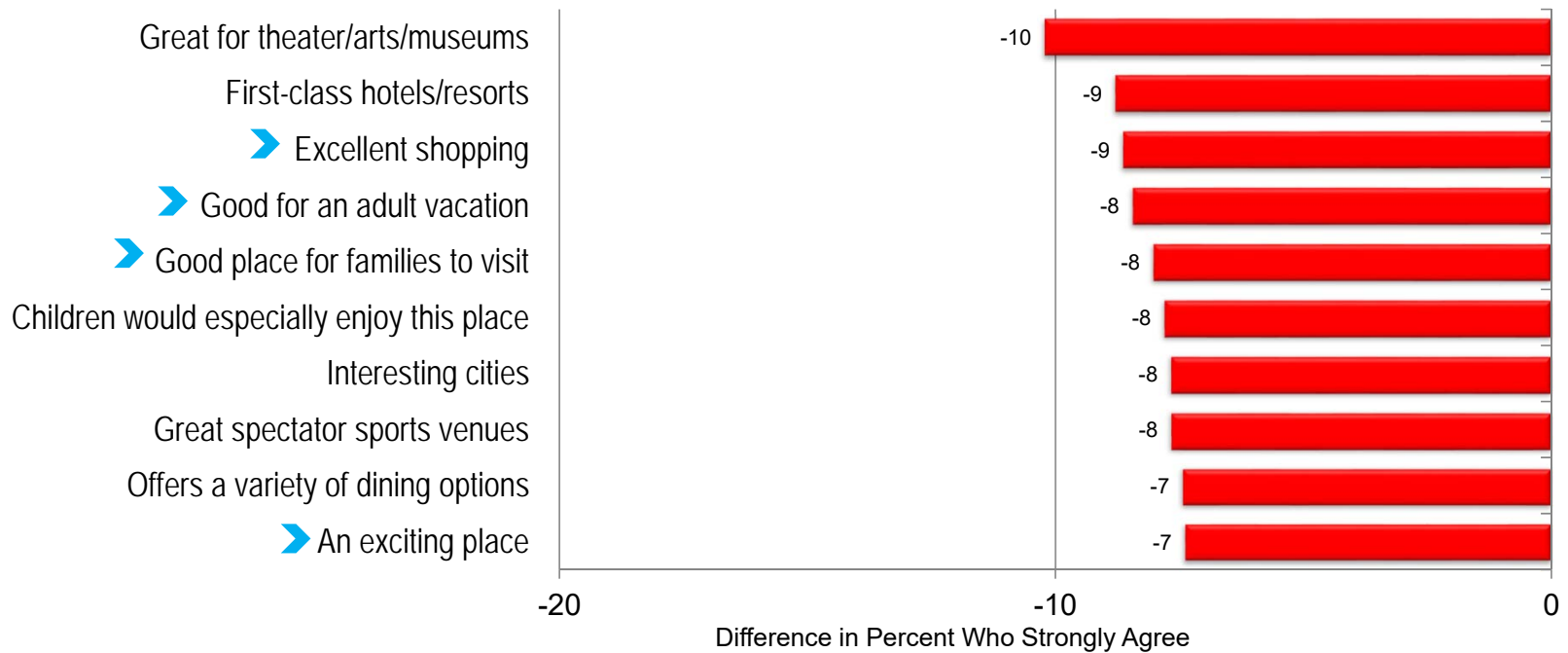


Oklahoma's Image Weaknesses vs. Missouri



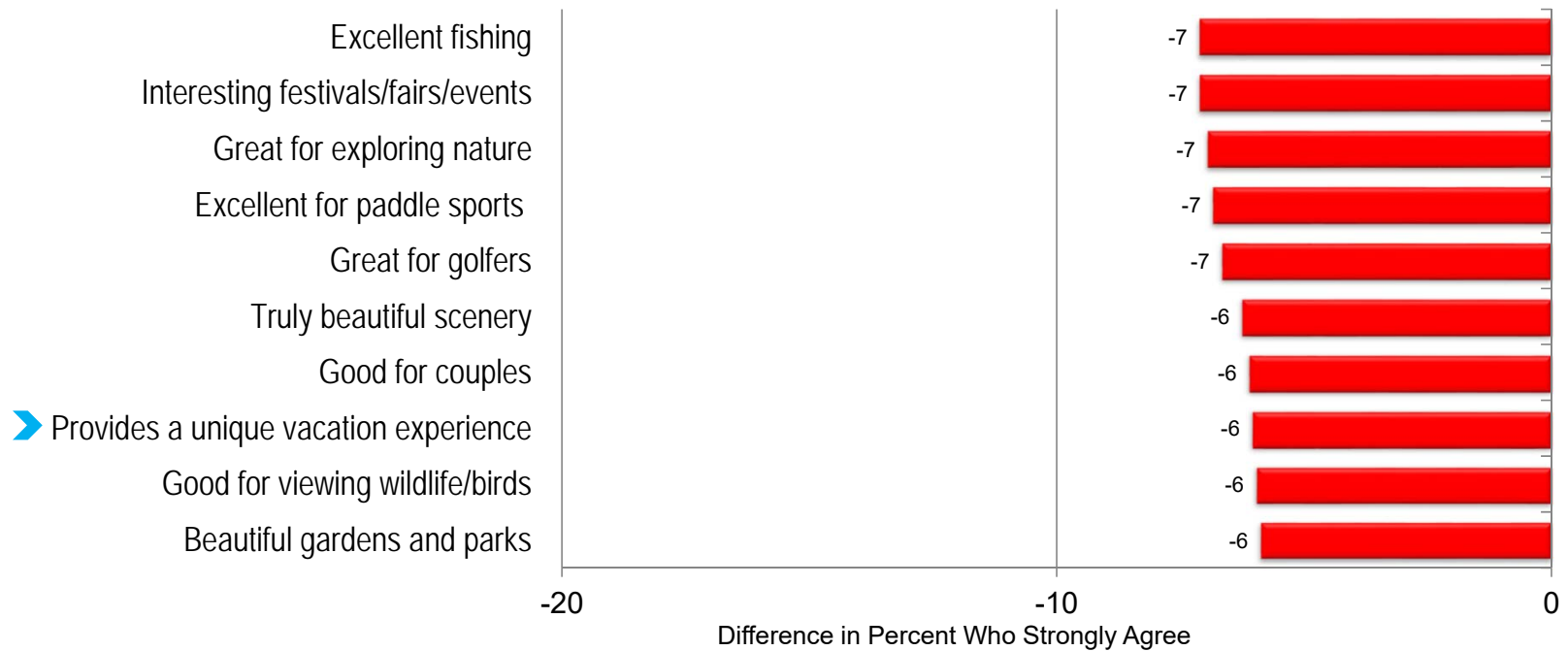
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Missouri (Cont'd)



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Oklahoma's Image Weaknesses vs. Missouri (Cont'd)

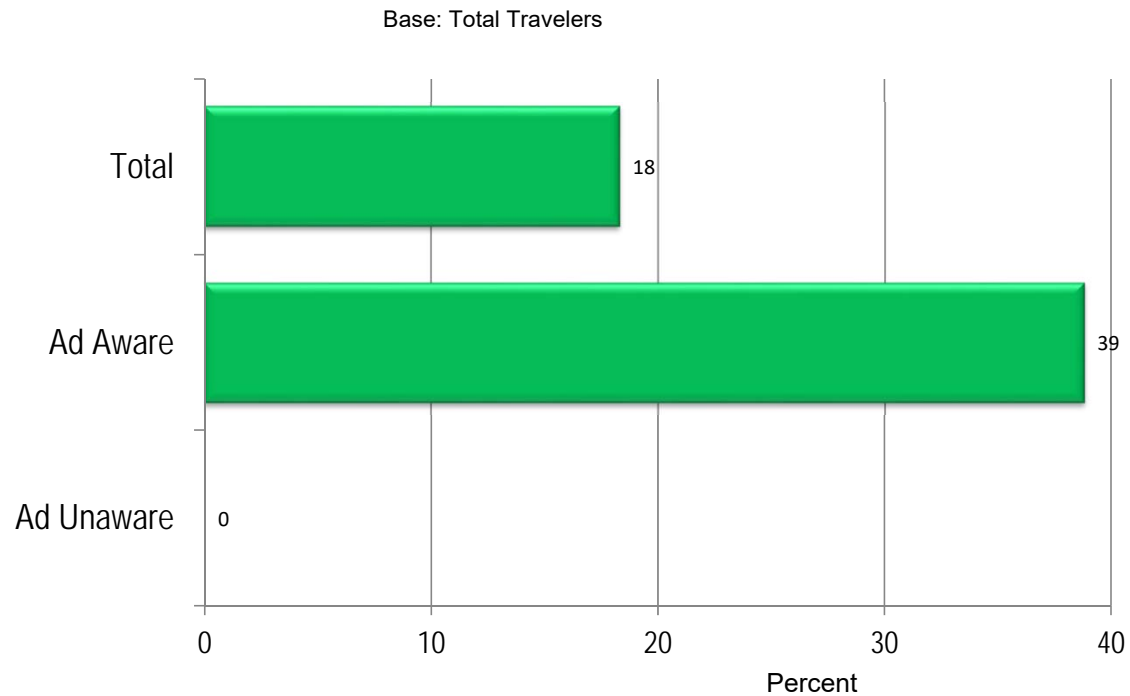


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers



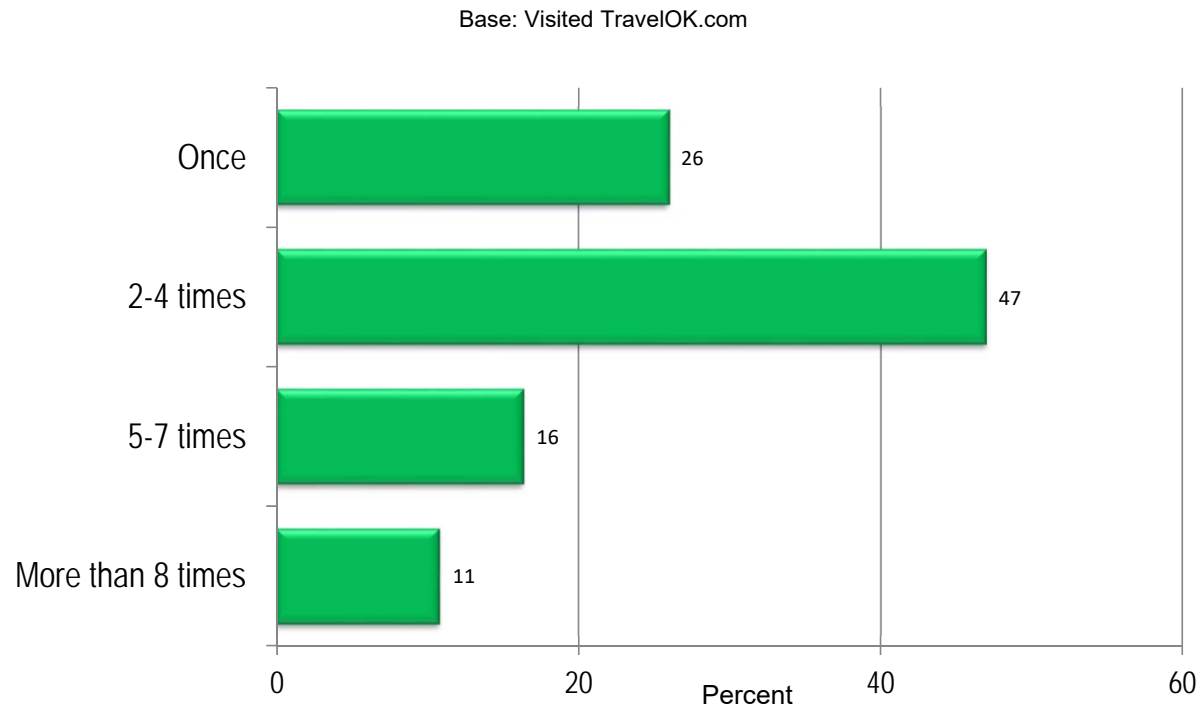
Impact of Ads on Visiting TravelOK.com Website and on Trip Planning

Visited Travel Website TravelOK.com by Advertising Awareness in 2018



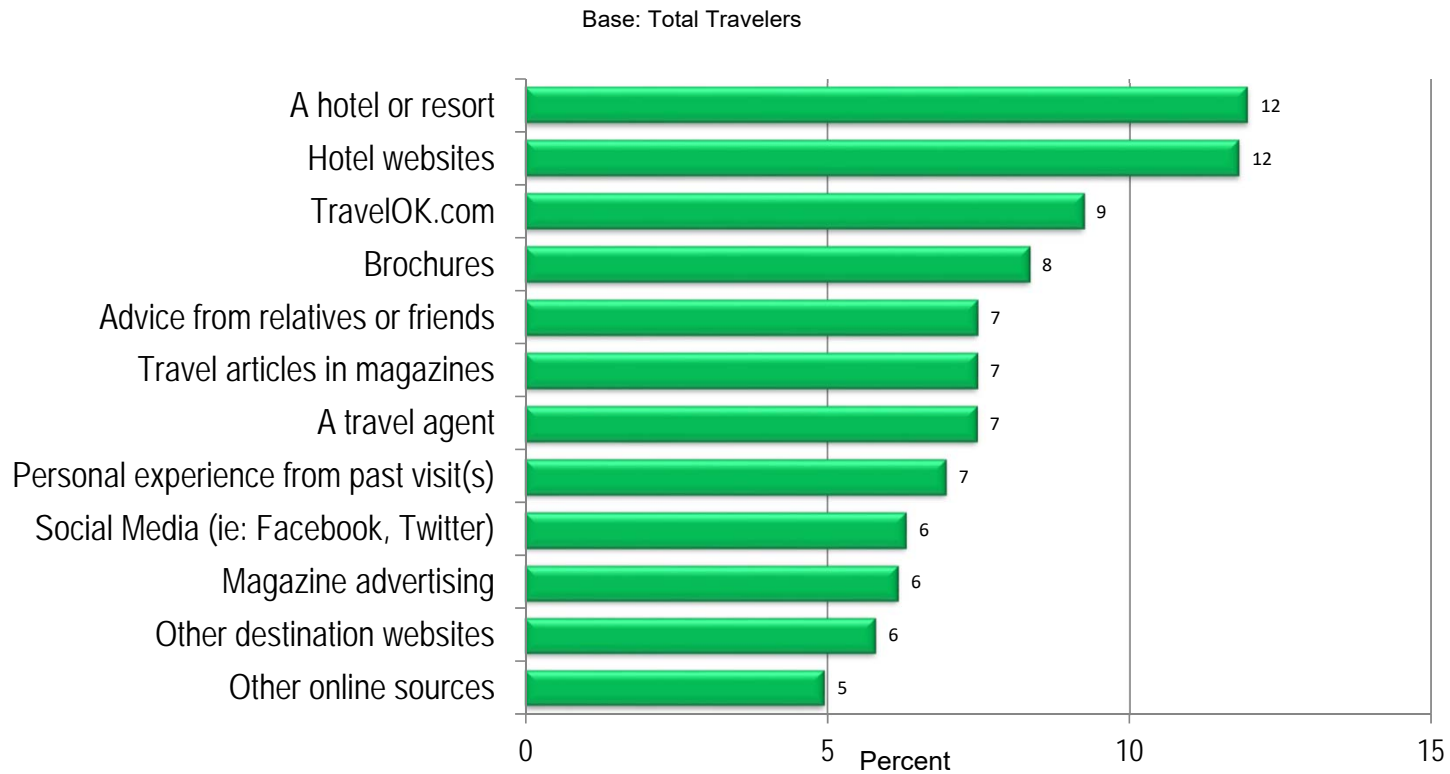
*All visits to the TravelOK.com website came from those aware of the advertising

Number of Times Visited Travel Website TravelOK.com in 2018*

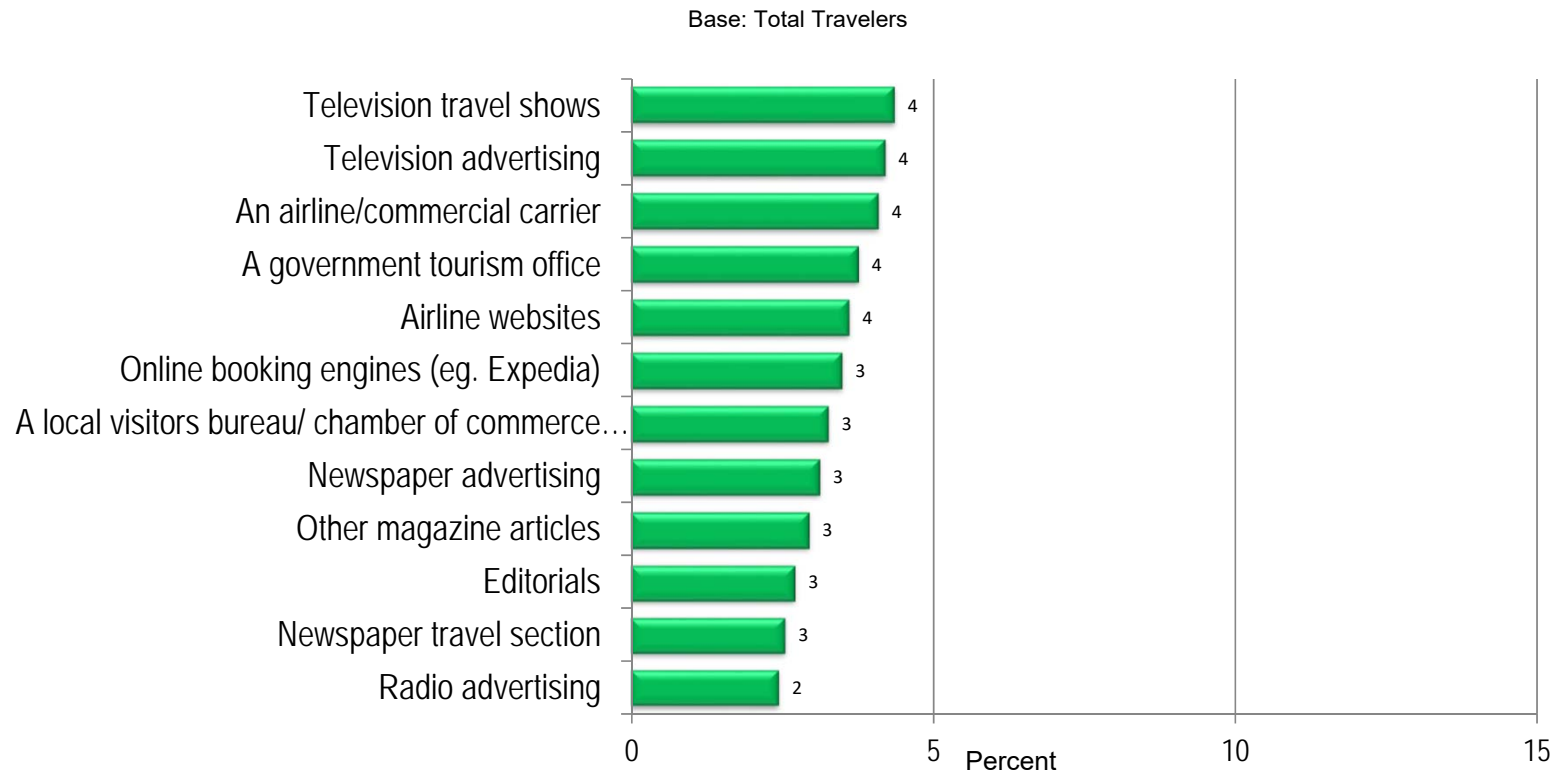


*All visits to the TravelOK.com website came from those aware of the advertising

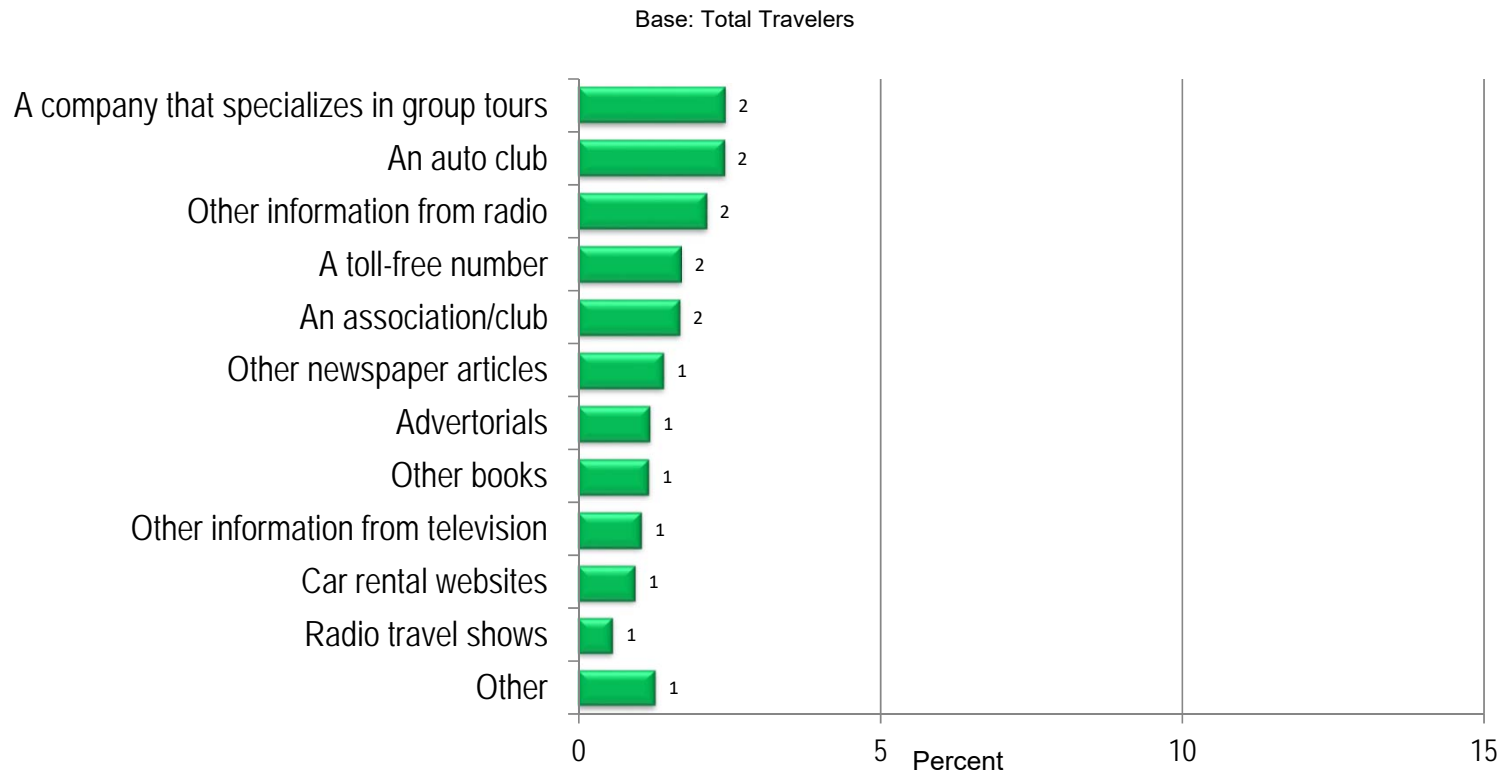
After Seeing the Ads - Information Sources Used for Planning - Detail



After Seeing the Ads - Information Sources Used for Planning - Detail (Cont'd)



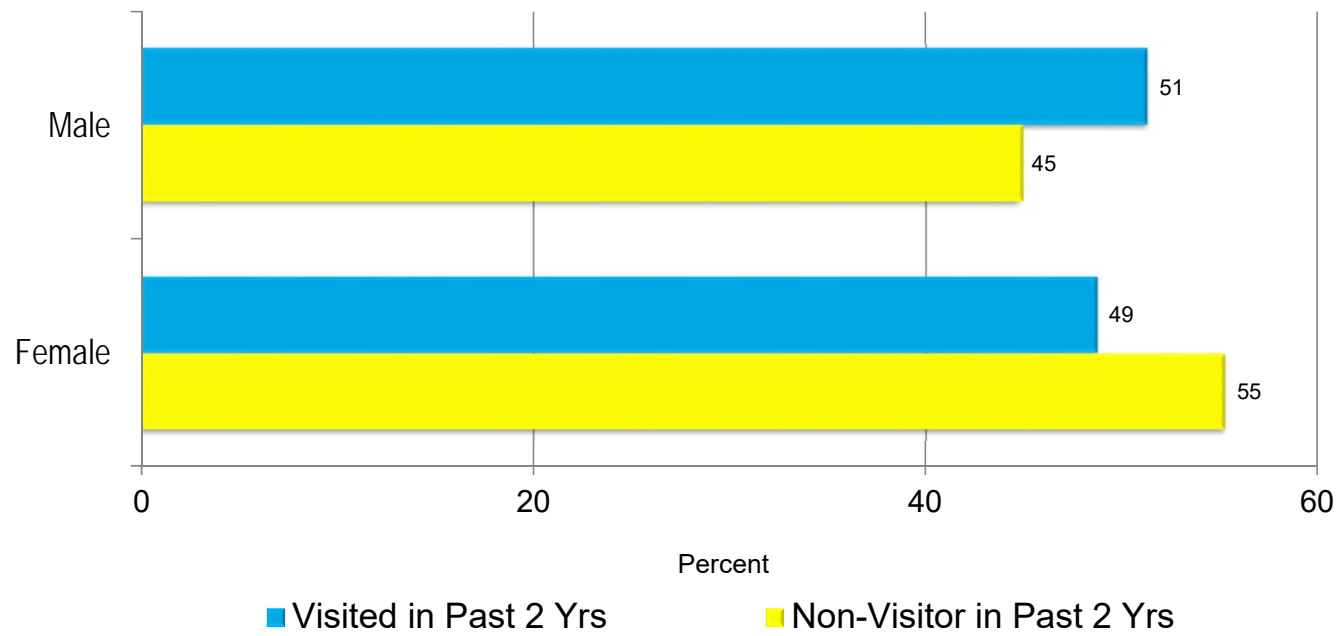
After Seeing the Ads - Information Sources Used for Planning - Detail (Cont'd)



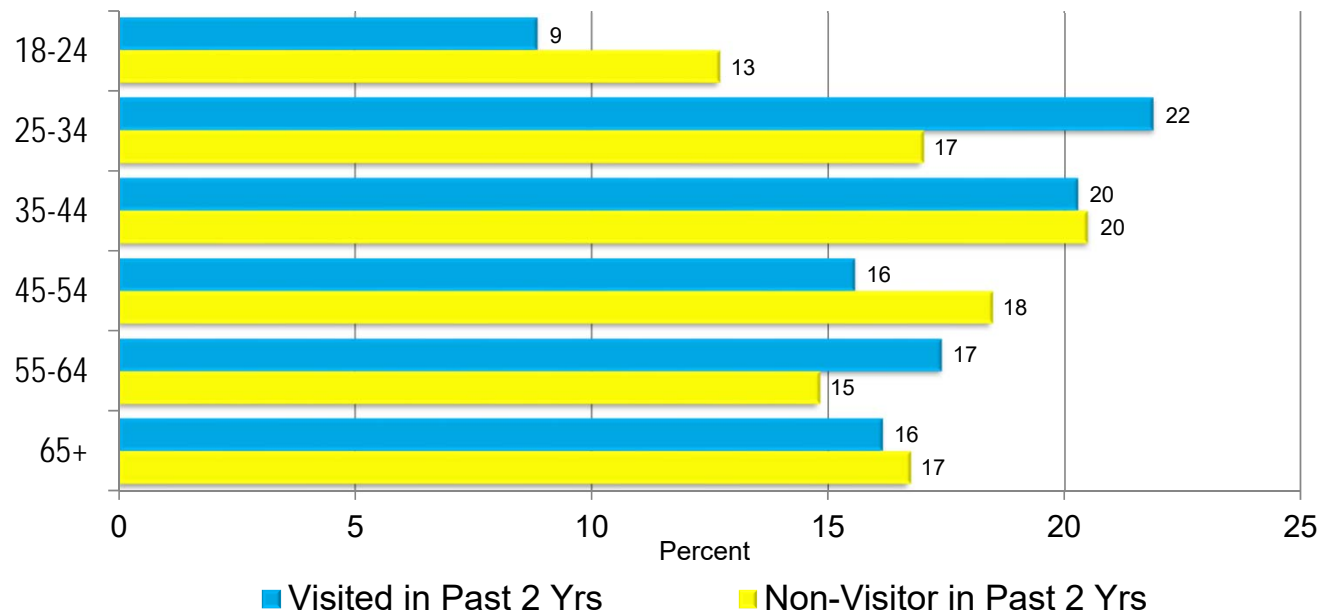


Appendix: Oklahoma's Past Visitor vs. Non-Visitor Demographics

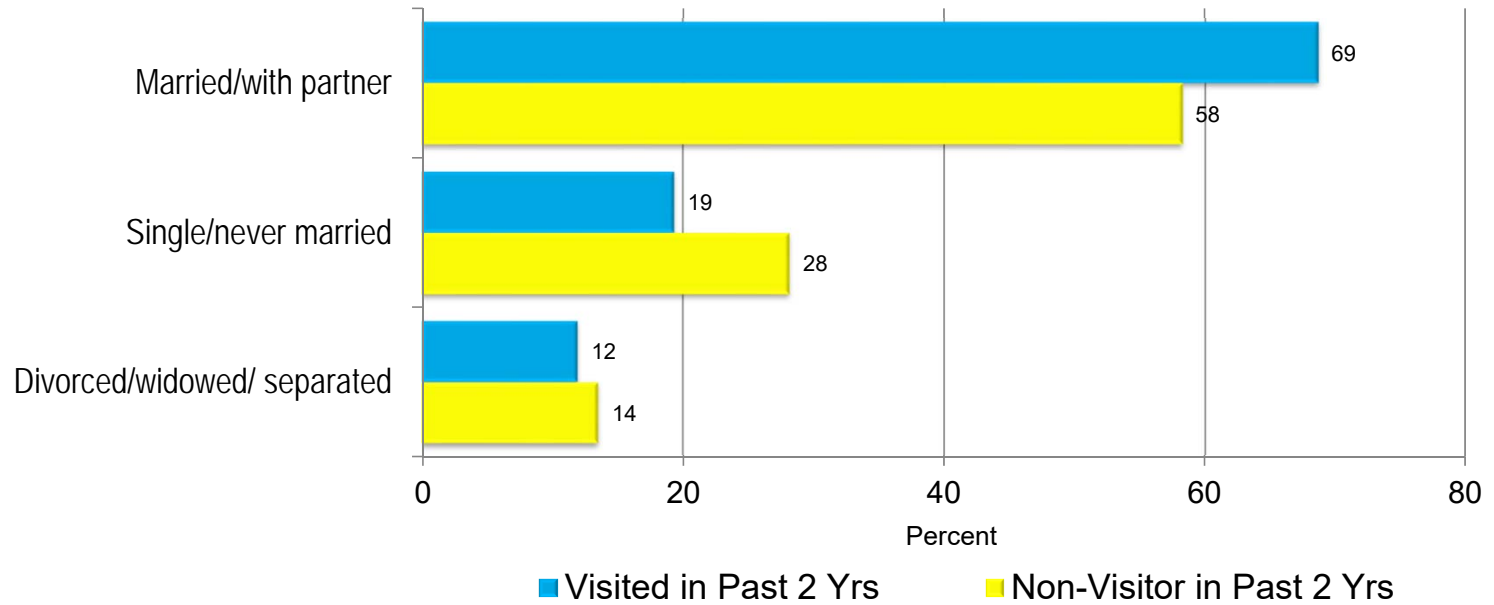
Gender



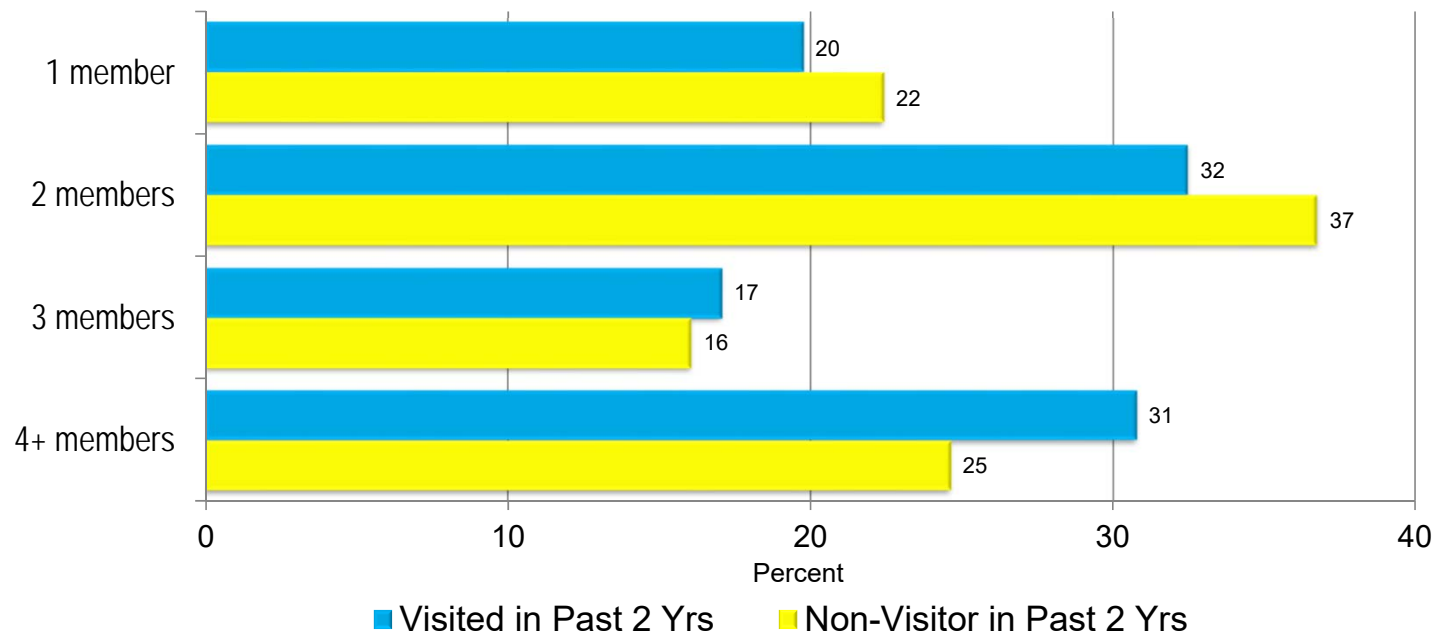
Age



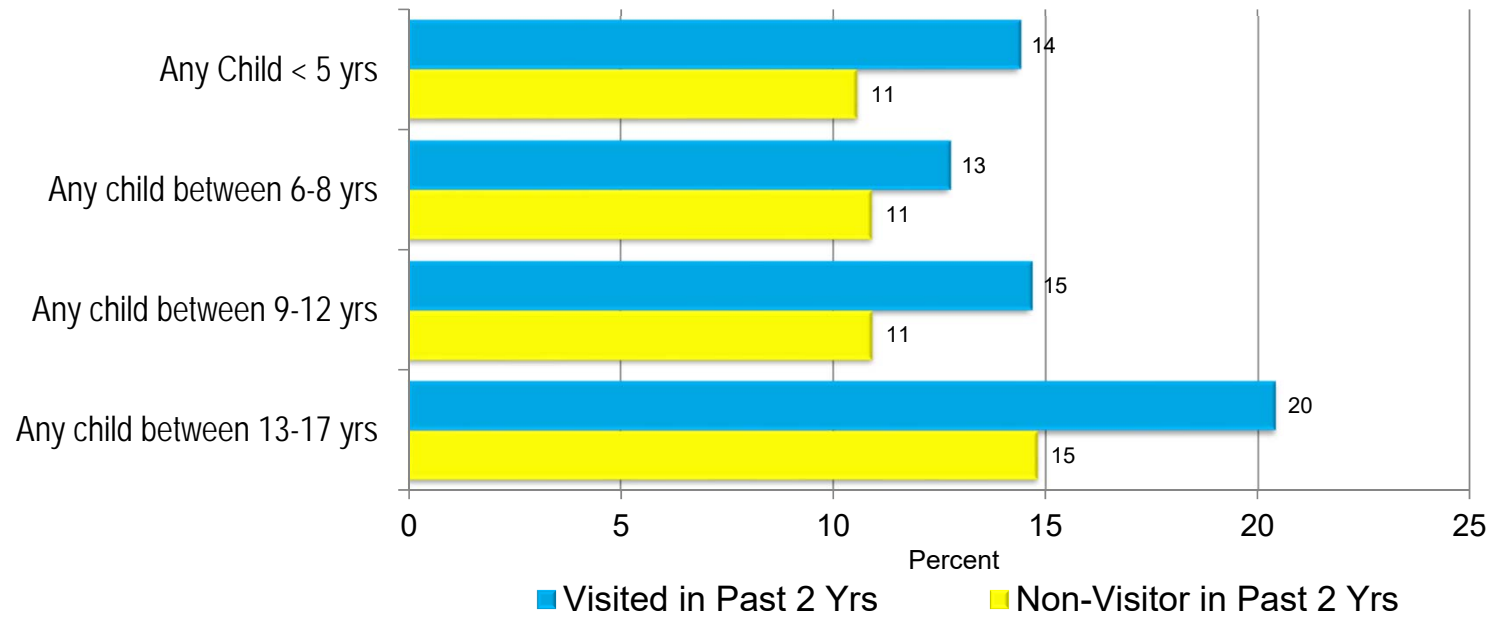
Marital Status



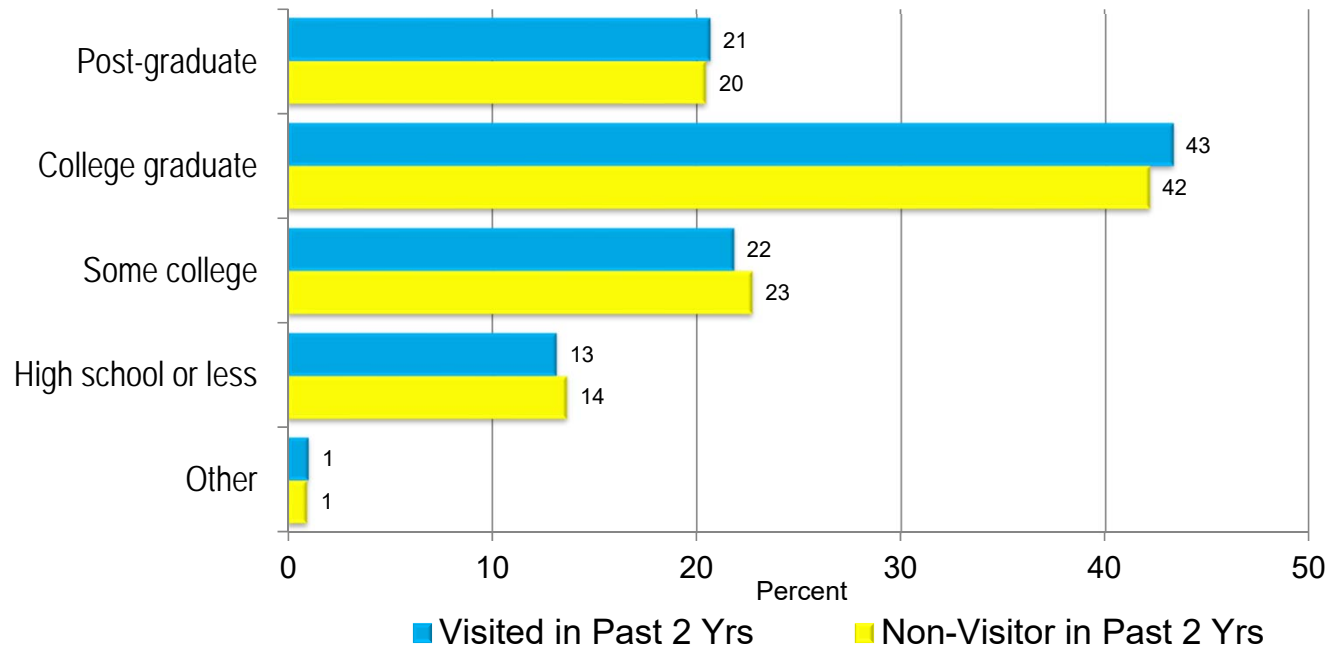
Household Size



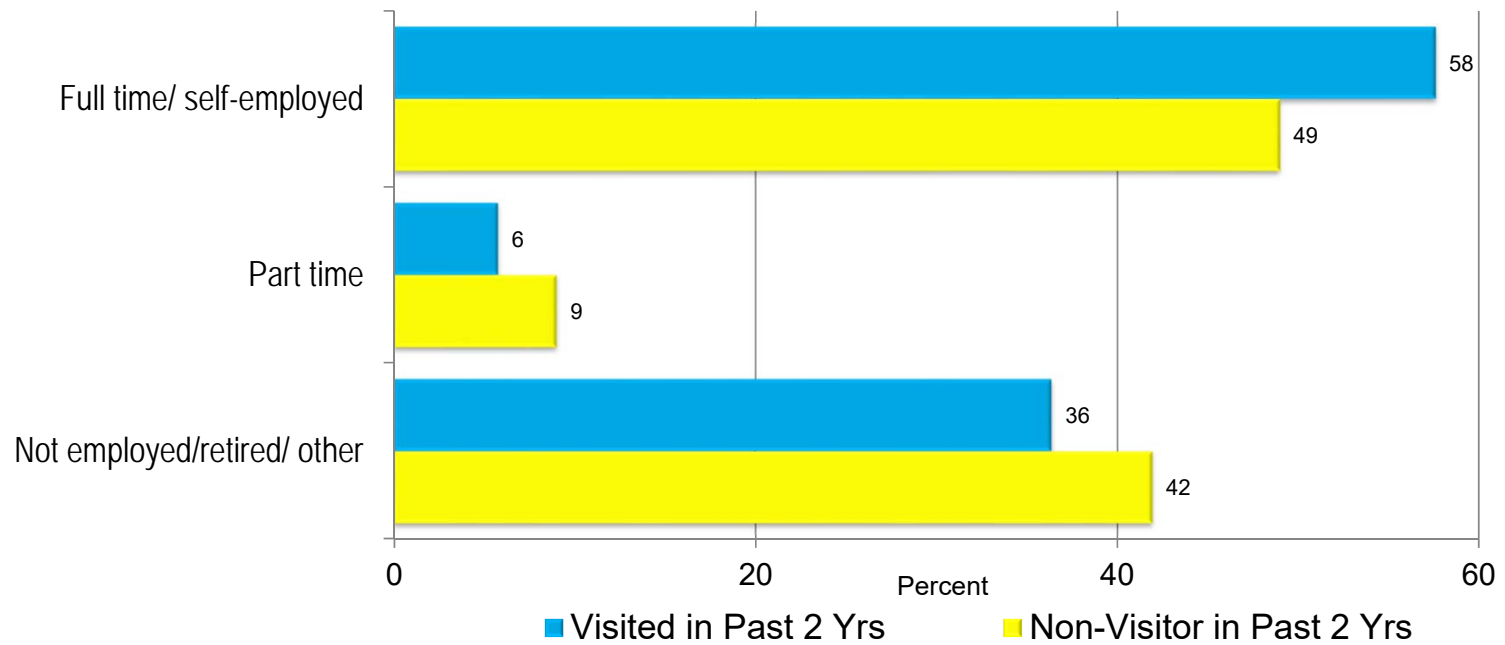
Children in Household



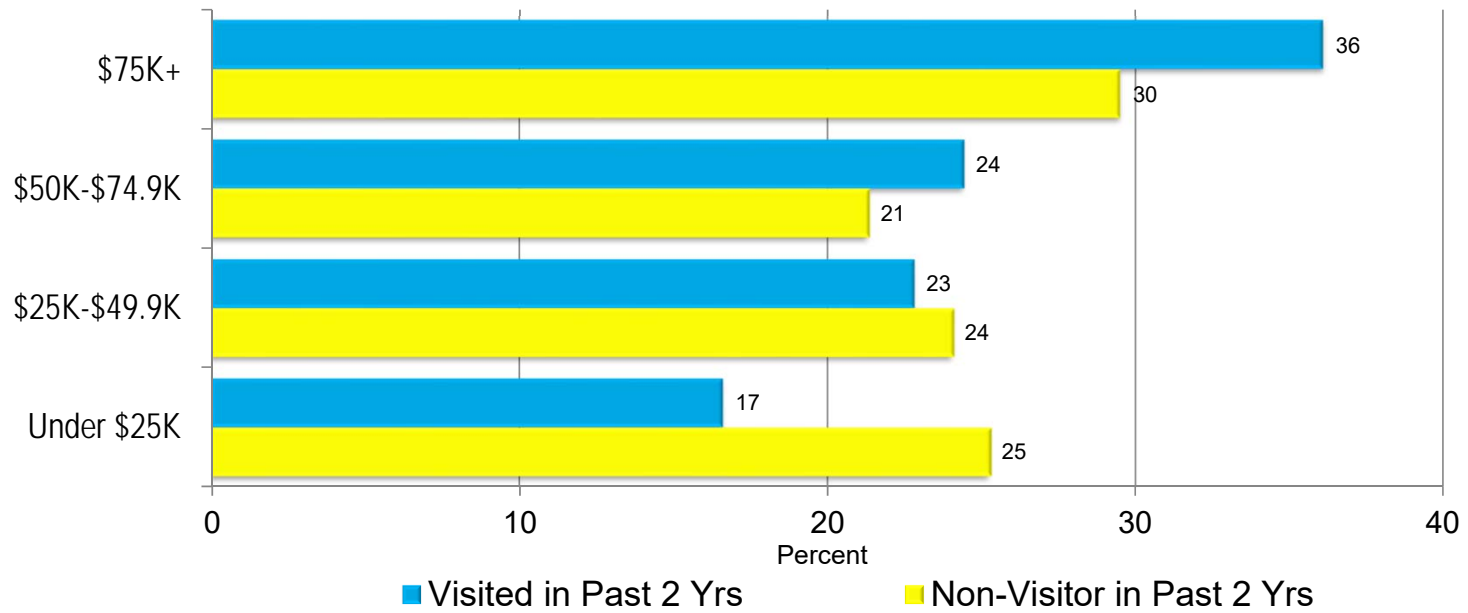
Education



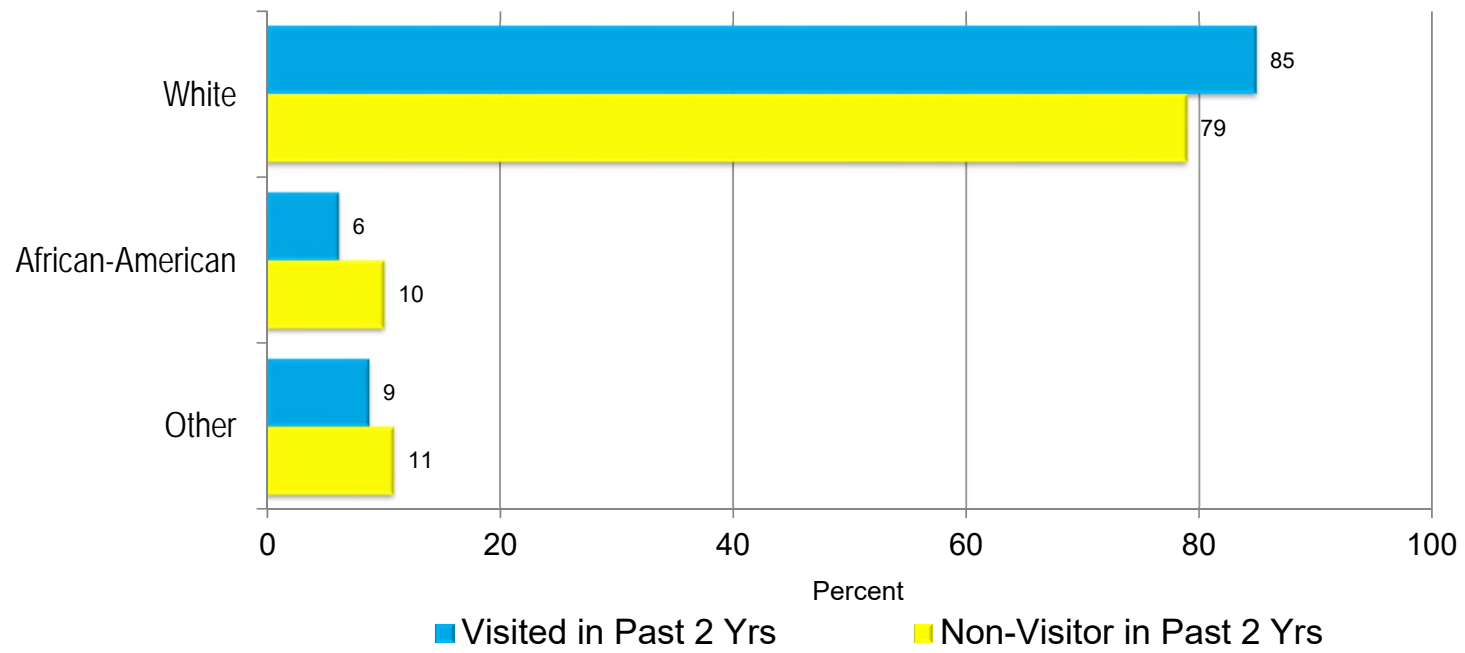
Employment



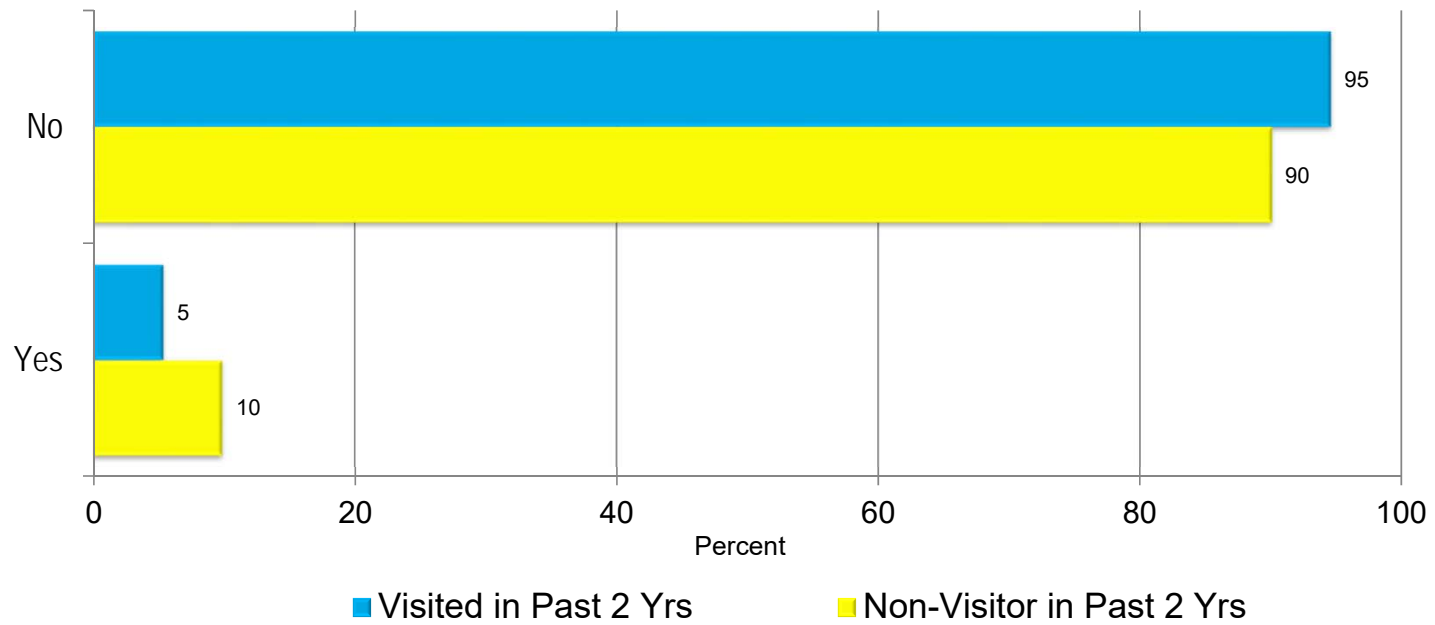
Household Income



Race



Hispanic Background



Area

