



# 2015 Oklahoma Image & Advertising Accountability Research

December 2015

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# Introduction



- ◉ Longwoods International was retained to undertake an evaluation of Oklahoma's 2015 tourism advertising campaign.
  
- ◉ This report presents the detailed study findings as they relate to:
  - ◉ *Oklahoma's image as a travel destination vs. its key competitors*
  - ◉ *The impact of the advertising on Oklahoma's image as a travel destination*
  - ◉ *The bottom-line impacts of the campaign*

# Purpose



- ⊙ The research was designed to provide:
  - ⊙ *Strategic image data*
    - *What are the image factors and attributes that are important in destination selection?*
    - *What is Oklahoma's image as a travel destination versus its key competitors: Texas, Missouri, Kansas, and Arkansas?*
  - ⊙ *A measure of both short-of-sales and bottom-line impacts of Oklahoma's tourism advertising:*
    - *Awareness/recall of the 2015 campaign*
    - *Incremental short-term trips to Oklahoma during and immediately following the advertising campaign*
    - *Incremental trips planned for the following year*
    - *Spending in Oklahoma by the incremental visitors*
    - *Direct taxes generated by that spending*

# Methodology



- ⦿ The study surveyed travelers in Oklahoma's advertising markets:
  - ⦿ *A **traveler** is defined as a person who has taken a day or overnight pleasure trip within the past 3 years, and intends to take one within the next two years. (76% of those screened met these requirements.)*
- ⦿ The study was conducted via a major online consumer sample in the U.S.:
  - ⦿ *The sample was selected to be representative of the markets being surveyed (Oklahoma (state), Dallas-Ft. Worth DMA, St. Louis DMA, San Antonio DMA, Kansas City DMA, Austin DMA, Little Rock-Pine Bluff DMA, Wichita-Hutchinson DMA, Springfield, MO DMA, Ft. Smith-Fayetteville-Springdale-Rodgers DMA, Amarillo, DMA, Wichita Falls-Lawton DMA, Los Angeles DMA, San Francisco DMA, and San Diego DMA)*
  - ⦿ *A total of **1,600** travelers participated in the study*

# Methodology (Cont'd)



- ◉ *Data was weighted prior to analysis based on age, gender, income, household size, and market size.*
- ◉ The questionnaire included:
  - ◉ *Travel history*
  - ◉ *Image of Oklahoma and its competitors (Texas, Missouri, Kansas, and Arkansas) as a travel destination on a battery of 61 attributes*
  - ◉ *Respondents were exposed to actual copies of Oklahoma's tourism ads. We use this aided recognition technique in order to minimize potential confusion of Oklahoma's ads with other destinations/advertisers that may be similar.*

# Conclusions

# Conclusions



- ◉ Oklahoma's advertising provides a very good economic return. The advertising provided \$204.6 million in additional spending among visitors that would not have come to Oklahoma without the advertising. This spending resulted in \$15.5 million additional state and local tax revenue against the \$2.2 million advertising cost for an 7:1 ratio (4:1 for state taxes and 3:1 for local taxes).
- ◉ The advertising awareness levels were strong at 47% of total travelers.
- ◉ The Oklahoma image is rated lower than the competitive states of Texas, Missouri, and Arkansas, but higher than Kansas. However, when the state's ad is seen or when the state is visited, the Oklahoma image greatly improves. Continuing and strengthening the trial strategy is recommended.



# Conclusions – Cont'd



- Specifically when travelers are aware of the advertising, Oklahoma is seen as being strong as “being an exciting place, “being the right distance for a weekend getaway,” with having a “good trail system,” and “great for outdoor adventure sports.”
- After visiting Oklahoma, travelers believe Oklahoma’s strengths include “not too far away to consider for a vacation,” “affordable to get to,” “has warm and friendly people,” “would feel comfortable when visiting” and “ is great for experiencing native culture, customs/traditions.”
- Oklahoma economic development image is positively impacted by the tourism advertising. Not only does the tourism advertising bring visitors, it also provides larger positive image change for the economic development areas of “a place to start a career,” “a place to start a business,” and “a place to live.”

# Destination Past Visitation & Interest

# Past and Future Visitation to Oklahoma

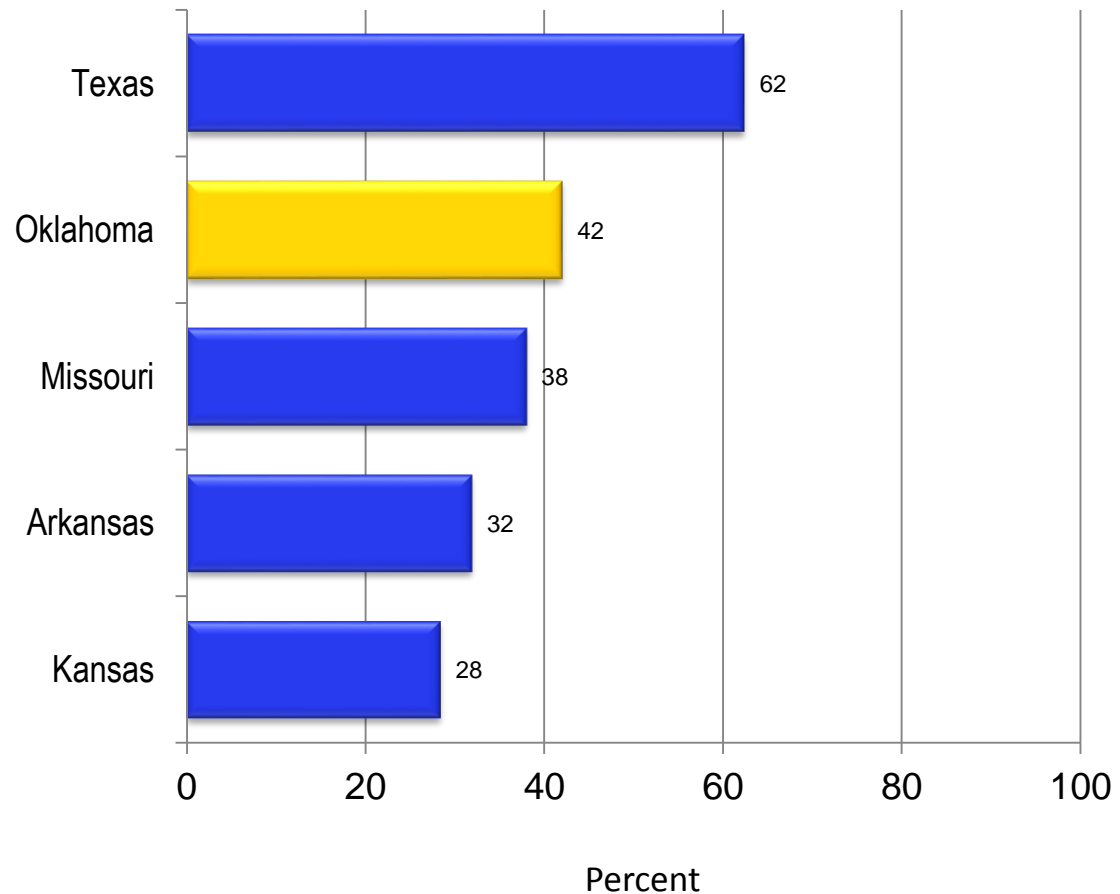


- Over four out of ten travelers have experienced Oklahoma at least once. Of those who have ever visited Oklahoma, over 60% have visited in the past 2 years.
- Almost 40% of the travelers plan an overnight or day visit to Oklahoma in the next year.
- The intent on visiting Oklahoma for an overnight trip is 39% while a day trip is 38%.

# Ever Visited — Day/Overnight Trip



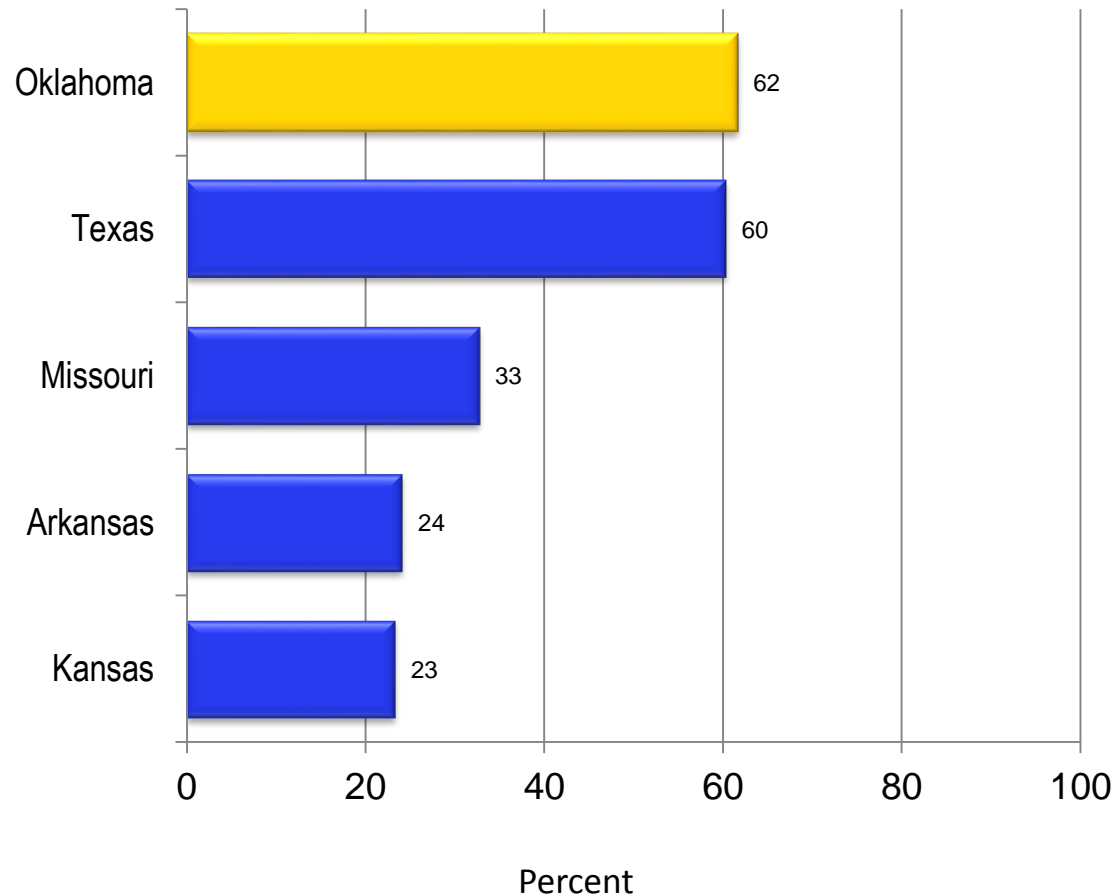
**Base: Total travelers**



# Past 2 Years— Day/Overnight Trip



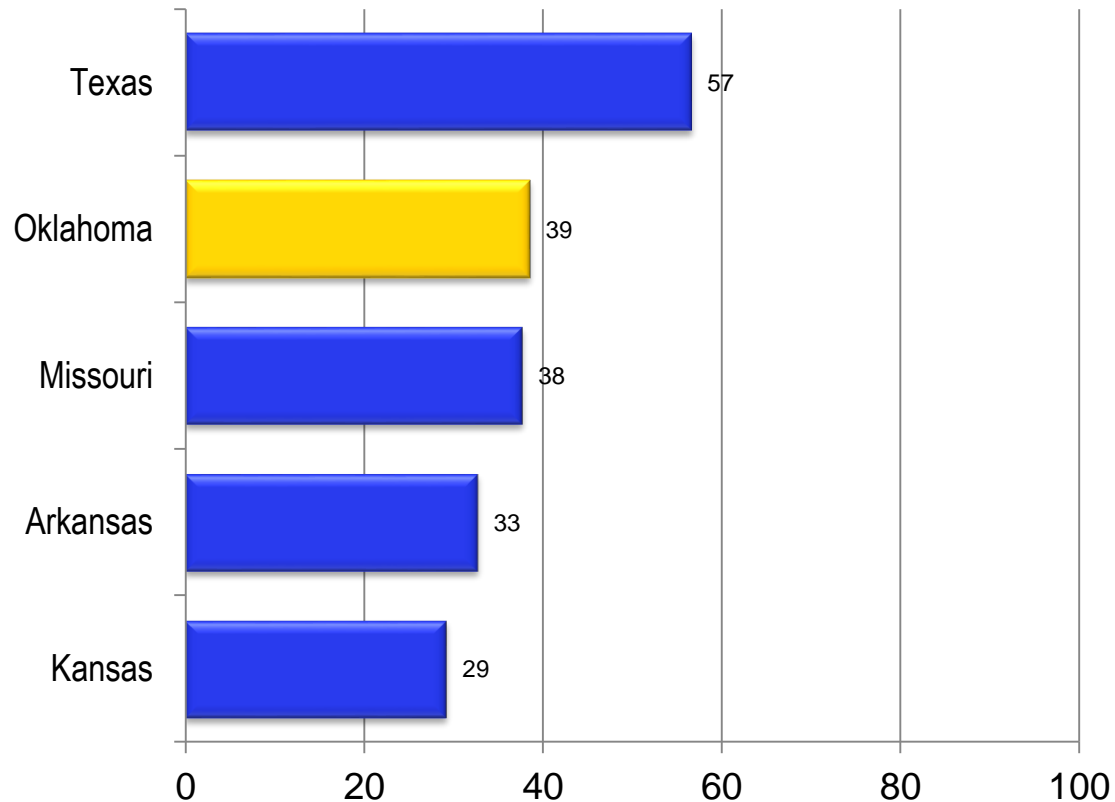
Base: Those who have ever visited on a day or overnight trip



# Intent to Visit in the Next Year



Base: Those who have ever visited on a day or overnight trip

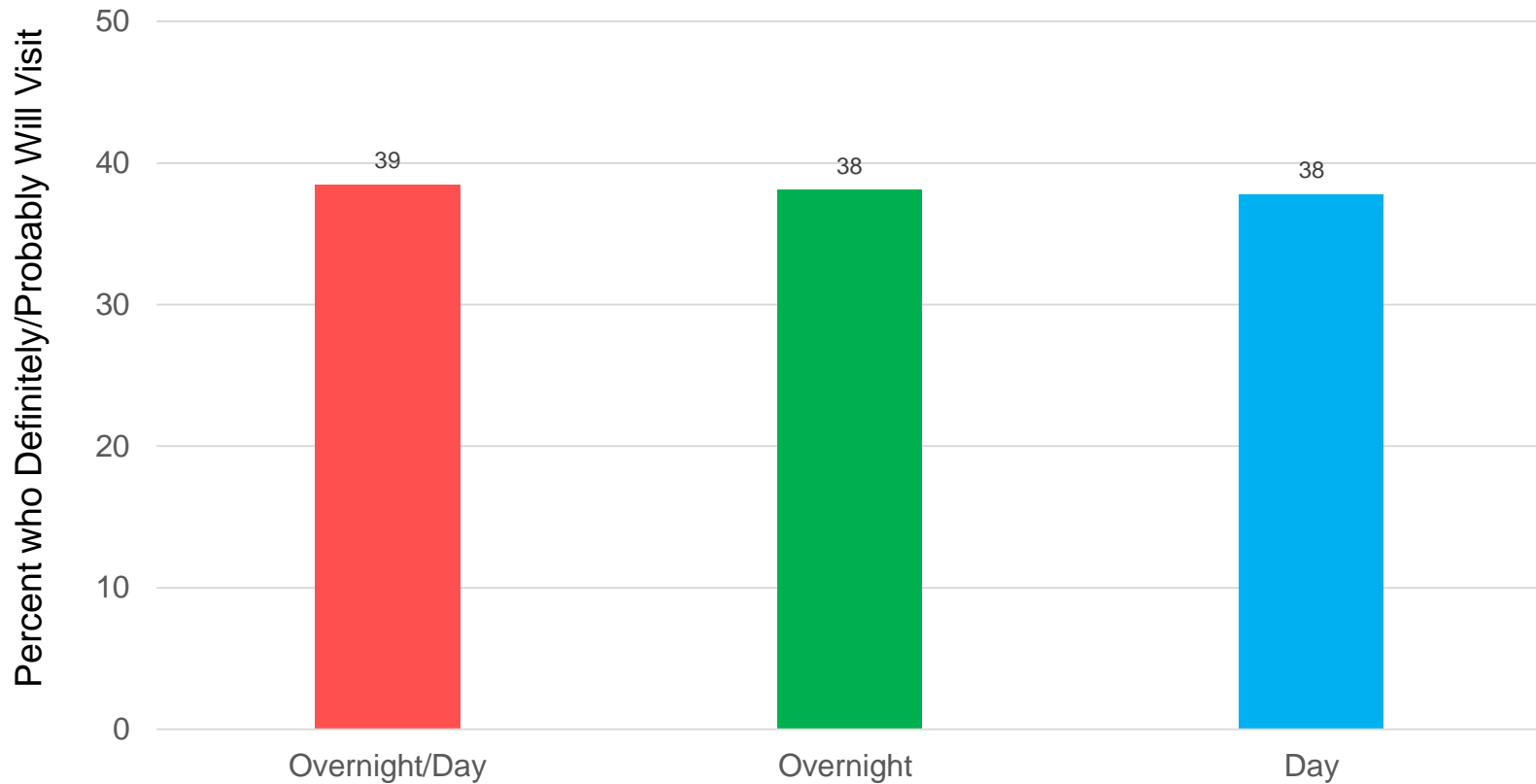


Percent who Definitely/Probably Will Visit

# Intent to Visit Oklahoma in the Next Year



Base: Those who have ever visited on a day or overnight trip



# **Travel Motivators and Hot Buttons**



# Travel Motivators



- ◉ **Longwoods** takes an innovative approach to profiling the factors that motivate travel and destination choice:
  - ◉ *direct questioning of respondents on this subject can often lead to misleading answers. Respondents' answers tend to favor rational over emotional ideas because they are easier to call to mind and articulate.*
- ◉ **Longwoods**, therefore, takes an indirect approach to uncovering these motivators:
  - ◉ *through predictive modeling analytics, we get below the surface and uncover the true factors that drive overall ratings of destination appeal and choice.*

# The Indirect Approach



- ◉ Respondents are asked to rate selected states across a robust list of destination **attributes** or characteristics.
- ◉ The statistical correlation between each attribute rating and the overall rating for being “*A place I would really enjoy visiting*” is then calculated.
  - ◉ *attributes showing strong correlations are strong predictors of destination choice and those with the highest are the ‘Hot Buttons’ that should be included in the communications messaging strategy .*
- ◉ Travel Motivator **factors** reflect the aggregated importance across related attributes.

# Travel Motivators and Hot Buttons

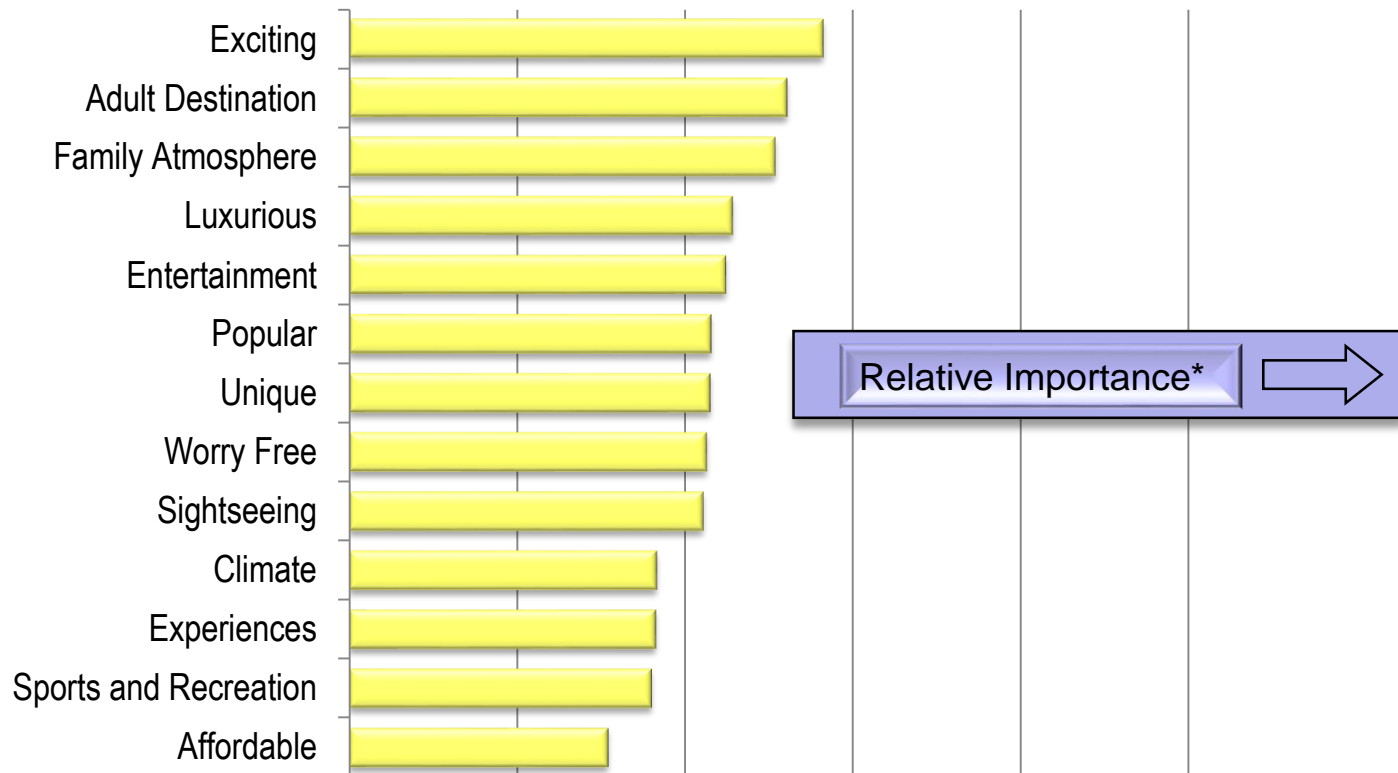


- The most important **factors** that drive interest in a destination choice in Oklahoma's advertised markets are:
  - *is **exciting** – an exciting, fun, and must see place that provides some sense of real adventure.*
  - *is also a great **destination for adults** but also provides a good **family atmosphere** – a place that is good for families and that children would enjoy.*
- It is also important in these markets that the destination communicates the hot buttons of:
  - *provides **unique experiences**.*
  - *the destination has **lots to see and do**.*
  - *has **interesting cities**.*
- These elements should be kept in mind in advertising messaging development.

# Travel Motivators



Base: Total Travelers



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

# Hot Buttons



Base: Total Travelers

## Top 10 Hot Buttons

**A fun place**

**An exciting place**

**A real adventure**

**Lots of things to see and do**

**Good for an adult vacation**

**Children would especially enjoy this place**

**Interesting cities**

**Unique vacation experience**

**Must see destination**

**Good for couples**

# Oklahoma's Image

# Oklahoma's Image



- To obtain travelers' perceptions of Oklahoma and its key competitors, respondents were asked to rate each state across a battery of attributes, using a ten-point scale where 10 meant 'Agree completely' and 1 meant 'Do not agree at all'.
  - *a 0 rating was allowed if they had no impression at all.*
  - *image charts report the proportion of respondents who rated a destination at 10, 9, or an 8 on each attribute.*
- Competitive states included: Texas, Missouri, Kansas, and Arkansas.

# Oklahoma's Image Strengths/Weaknesses



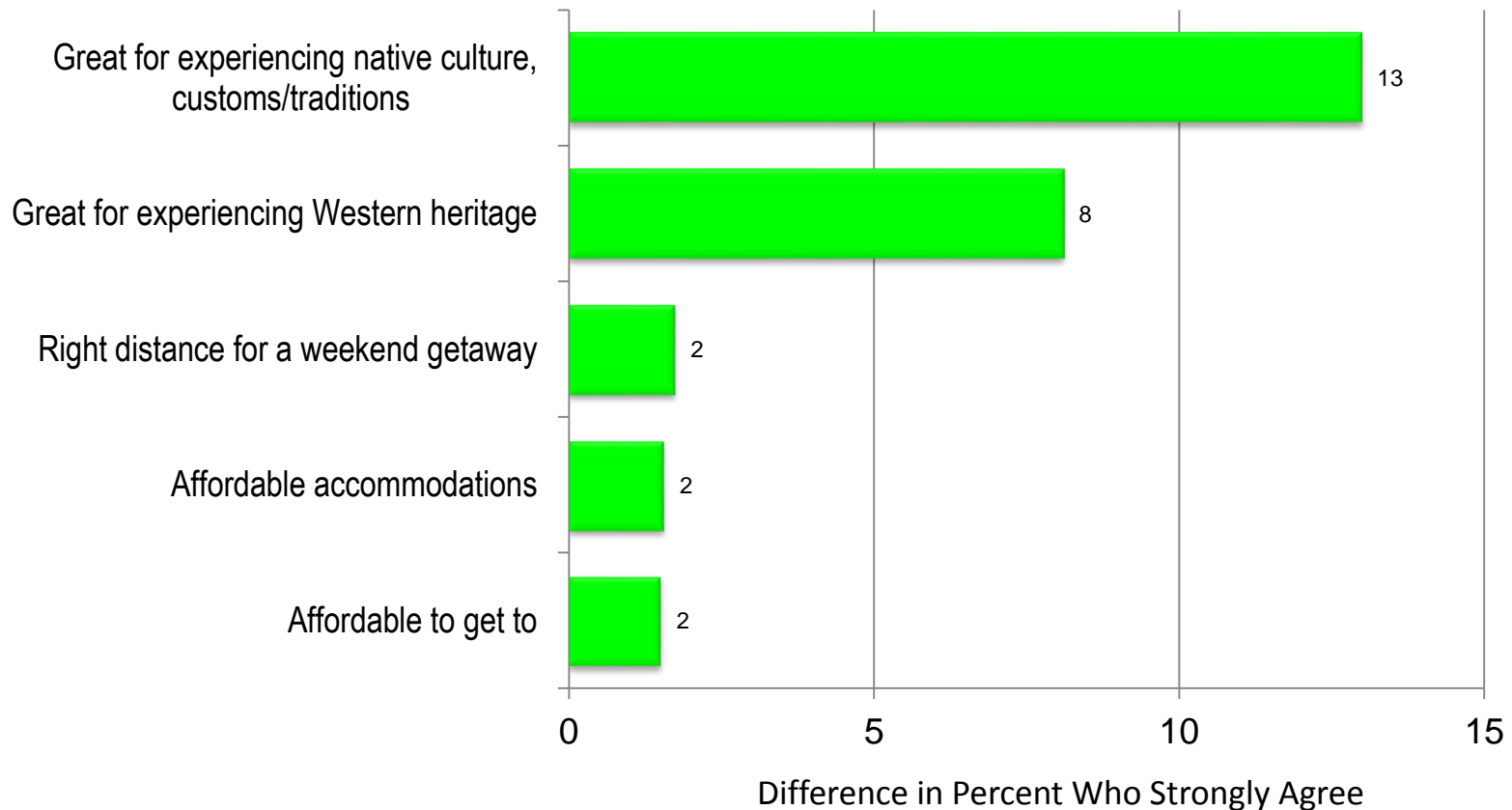
- ◉ Oklahoma received its highest image ratings versus the competitors' average for its:
  - ◉ *great for experiencing native culture, customs, traditions*
  - ◉ *great for experiencing Western heritage*
  - ◉ *right distance for a weekend getaway*
  - ◉ *affordable accommodations*
  - ◉ *affordable to get to*
  
- ◉ Largest weaknesses of Oklahoma vs the competitors' average are:
  - ◉ *Well-known landmarks*
  - ◉ *Well-known destination*
  - ◉ *Lots of things to see and do*
  - ◉ *Exciting nightlife/entertainment/shows*



# Oklahoma Image Strengths vs. Competitors



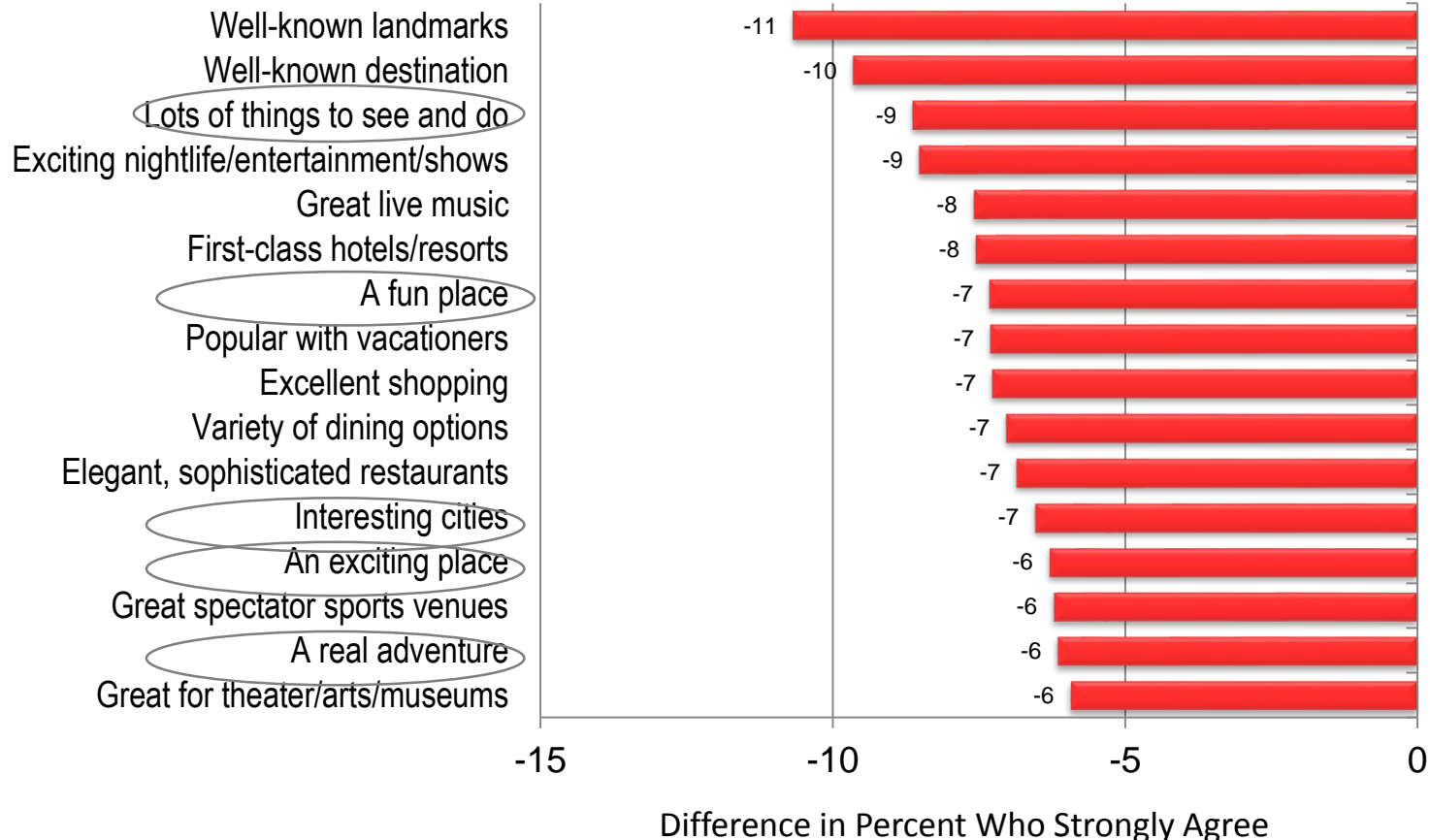
Base: Total Travelers



# Oklahoma Image Weaknesses vs. Competitors



Base: Total Travelers



Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image vs. the Competition

# Oklahoma's Image vs. Competitors

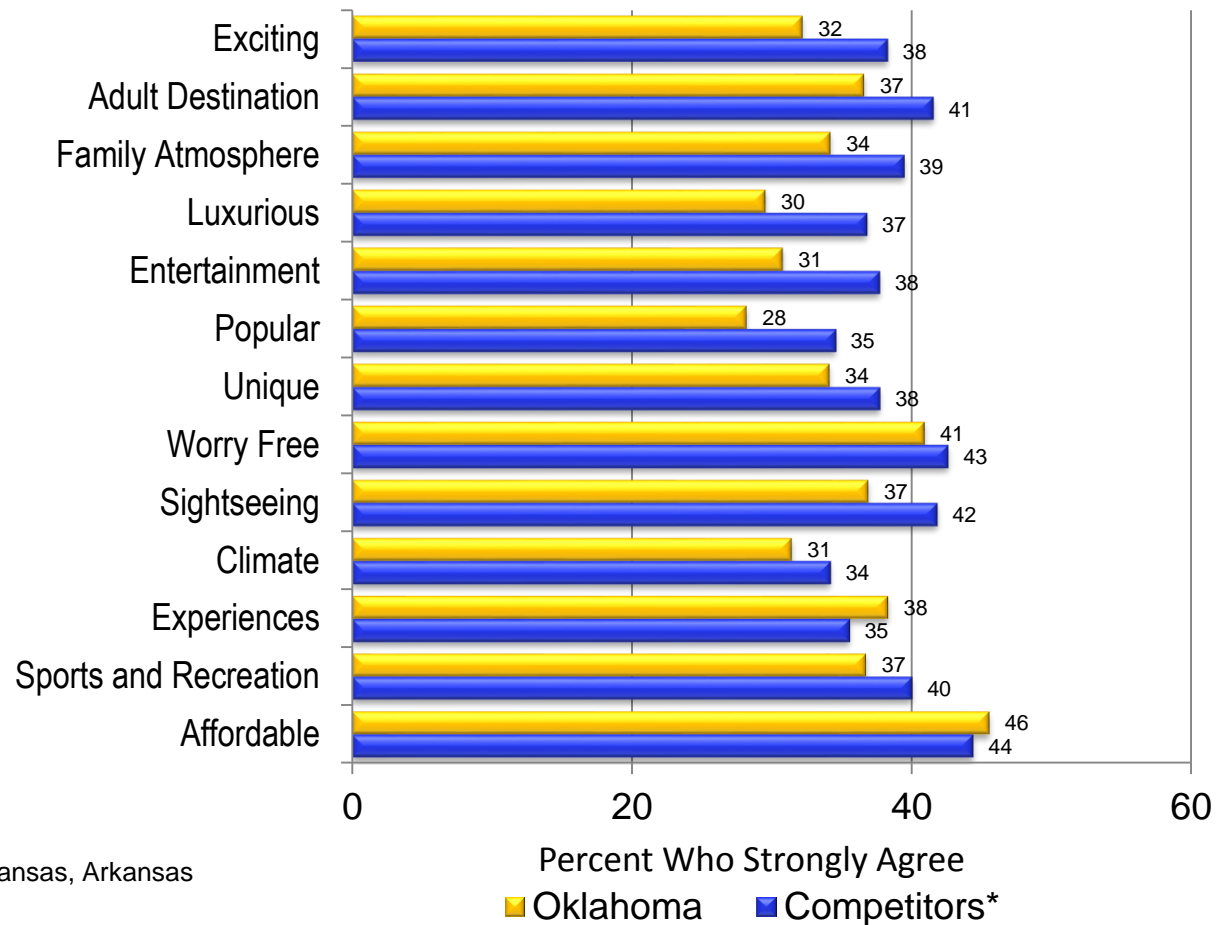


- Oklahoma's image is rated higher for *Experiences* and *Affordable* versus the competitors' average.
- For the remaining factors, Oklahoma is rated lower than the competitors' average
- With exception of *Experiences* and *Affordable*, Oklahoma's image ratings are generally lower than Texas, slightly below Missouri and Arkansas and higher than Kansas. Further detail can be found on slides 32-69.

# Oklahoma's Image vs. Competitors



Base: Total Travelers

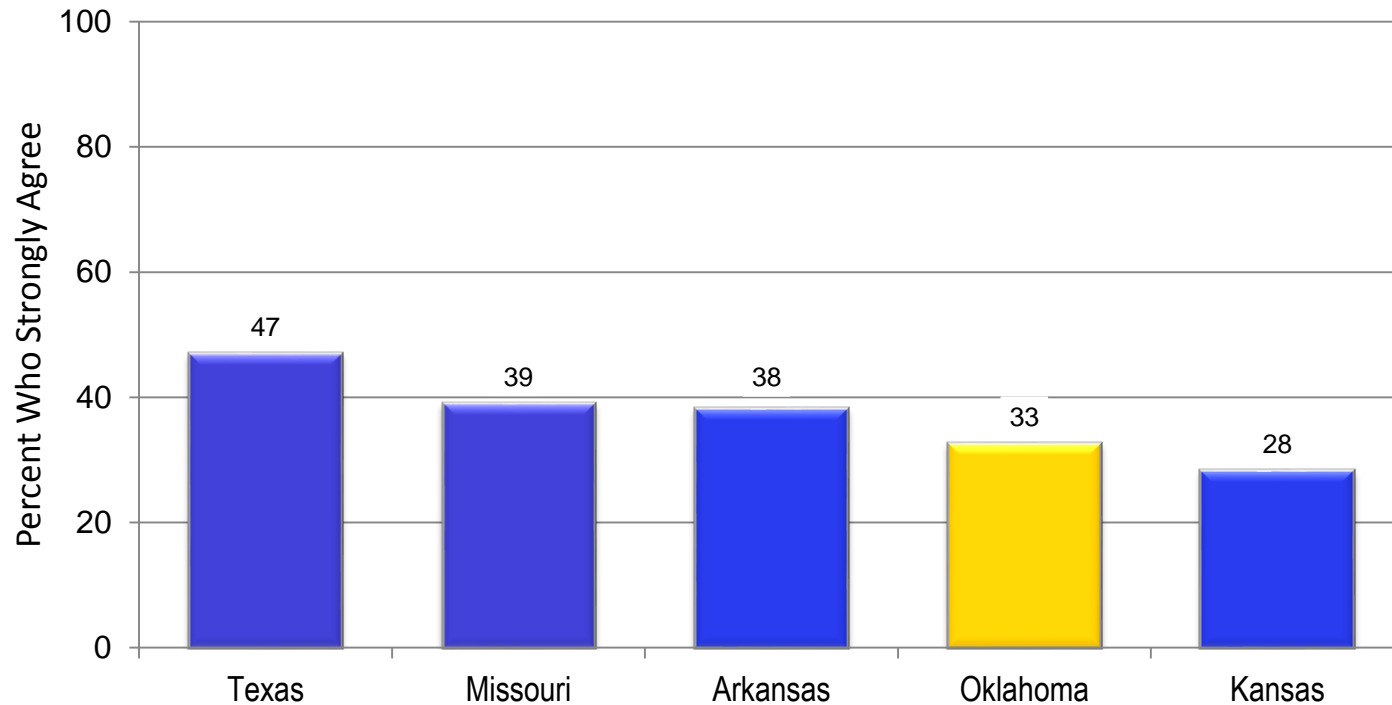


- Competitors: Texas, Missouri, Kansas, Arkansas

# Overall Image: “Would Really Enjoy Visiting”



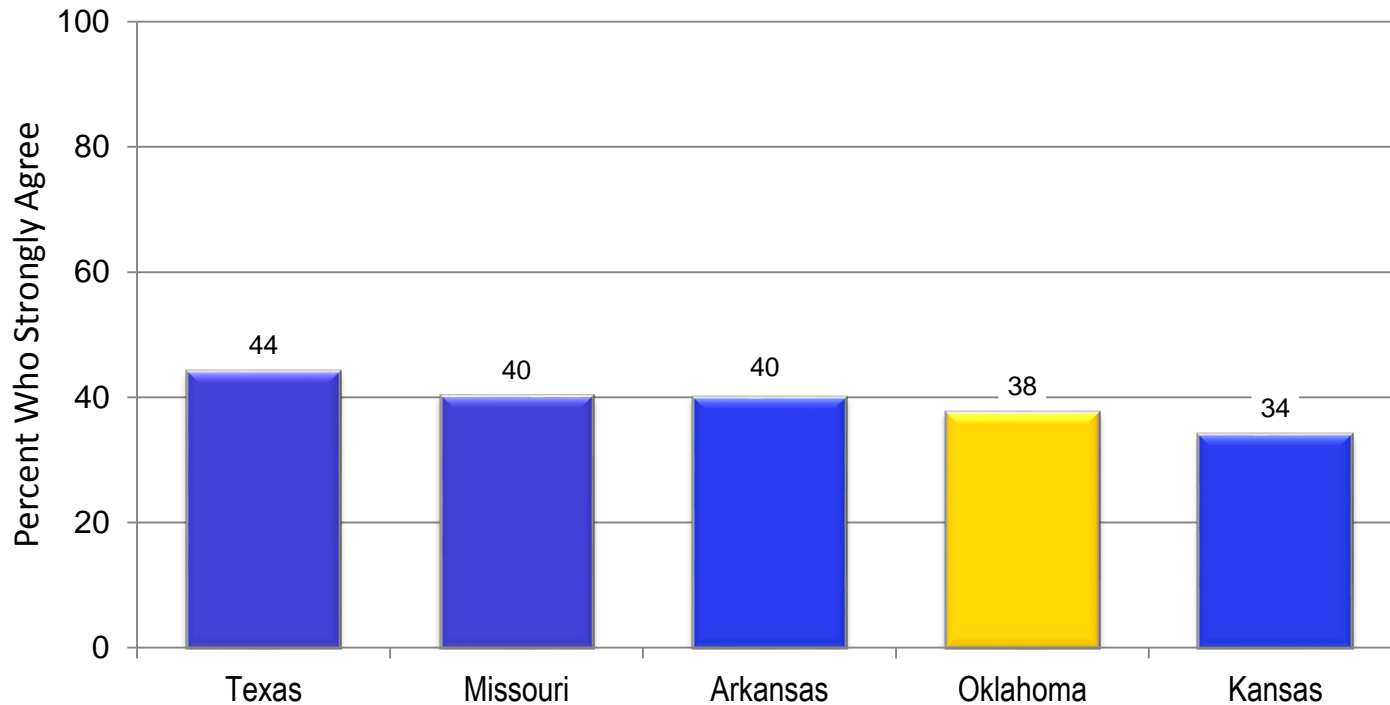
Base: Total Travelers



# Overall Image: “Excellent Vacation Value for the Money”



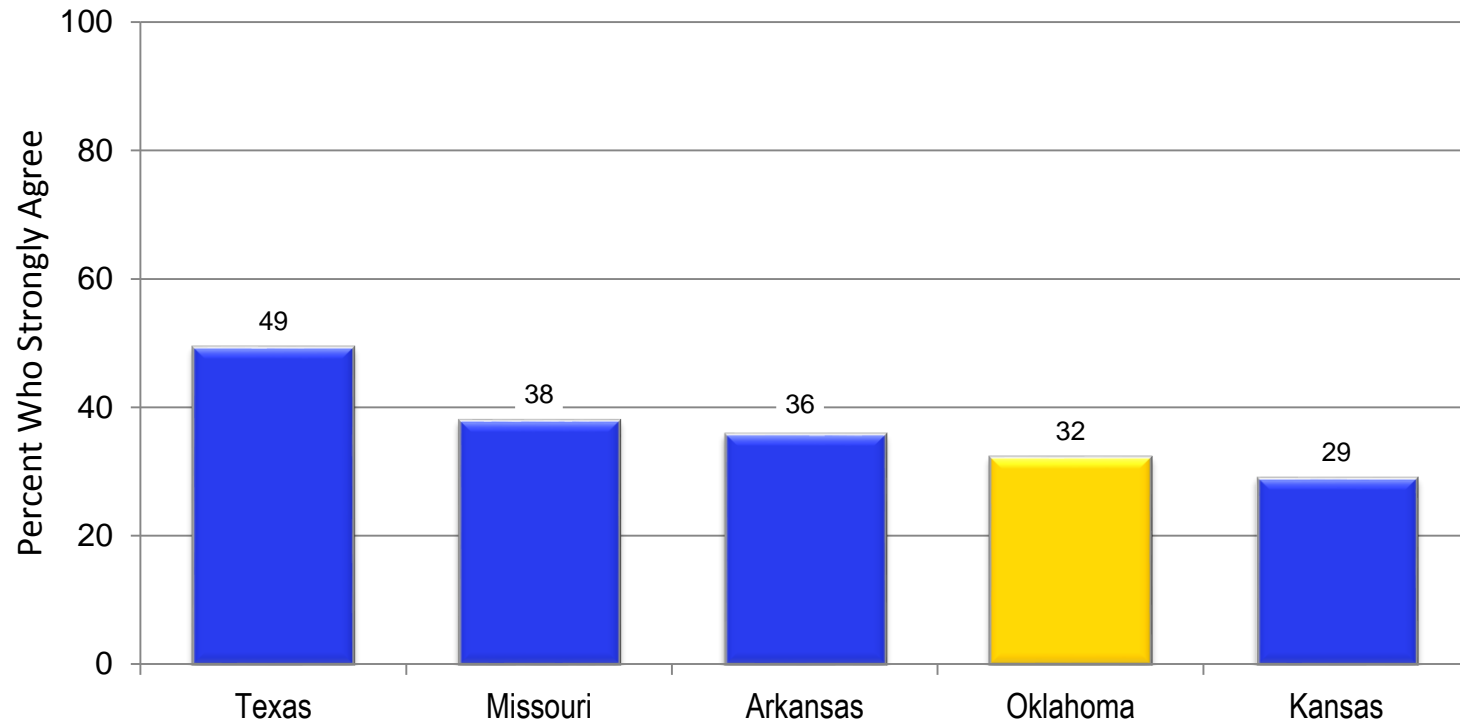
Base: Total Travelers



# Oklahoma Image vs. Competitors — Exciting



Base: Total Travelers

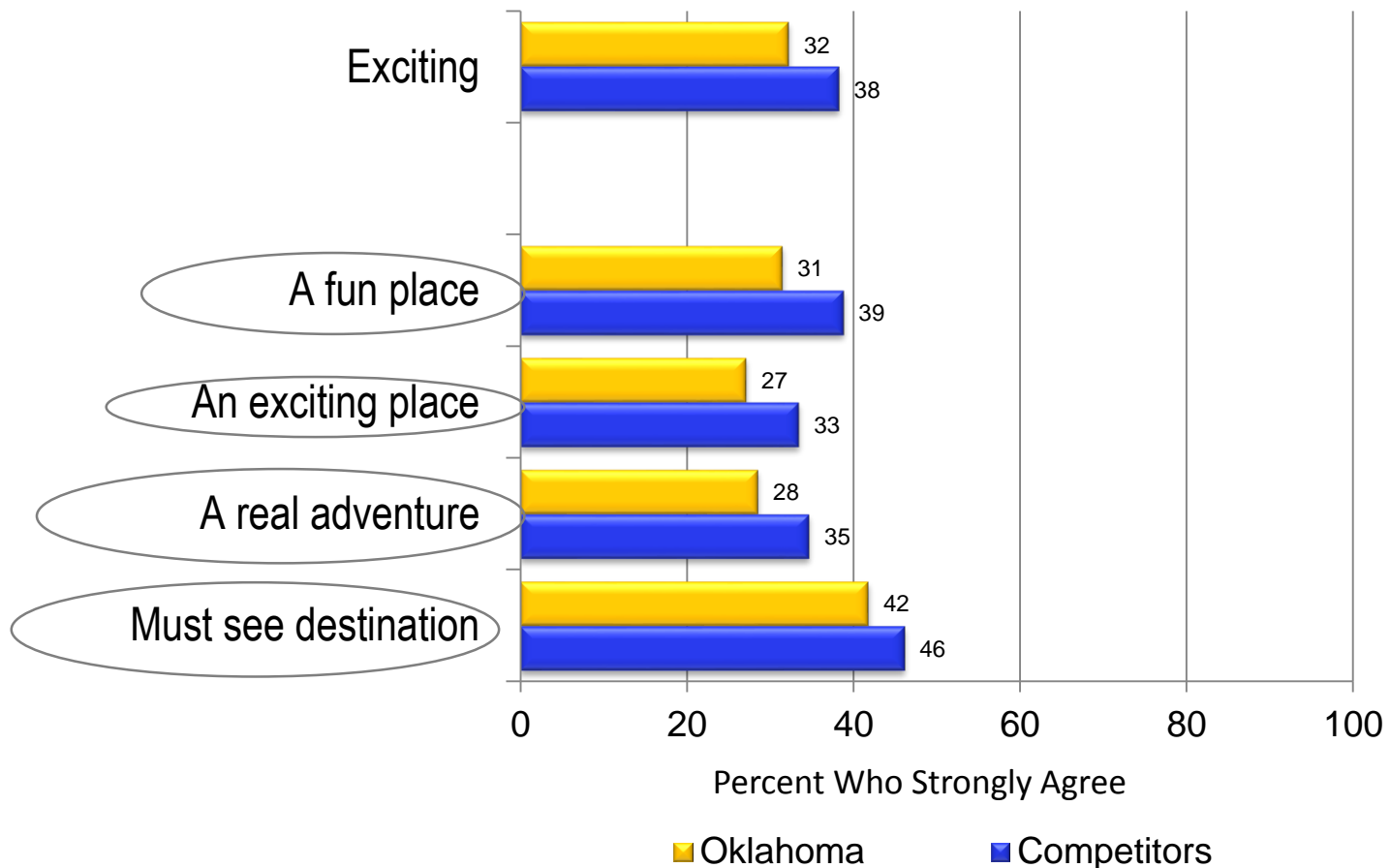




# Oklahoma Image vs. Competitors — Exciting



Base: Total Travelers



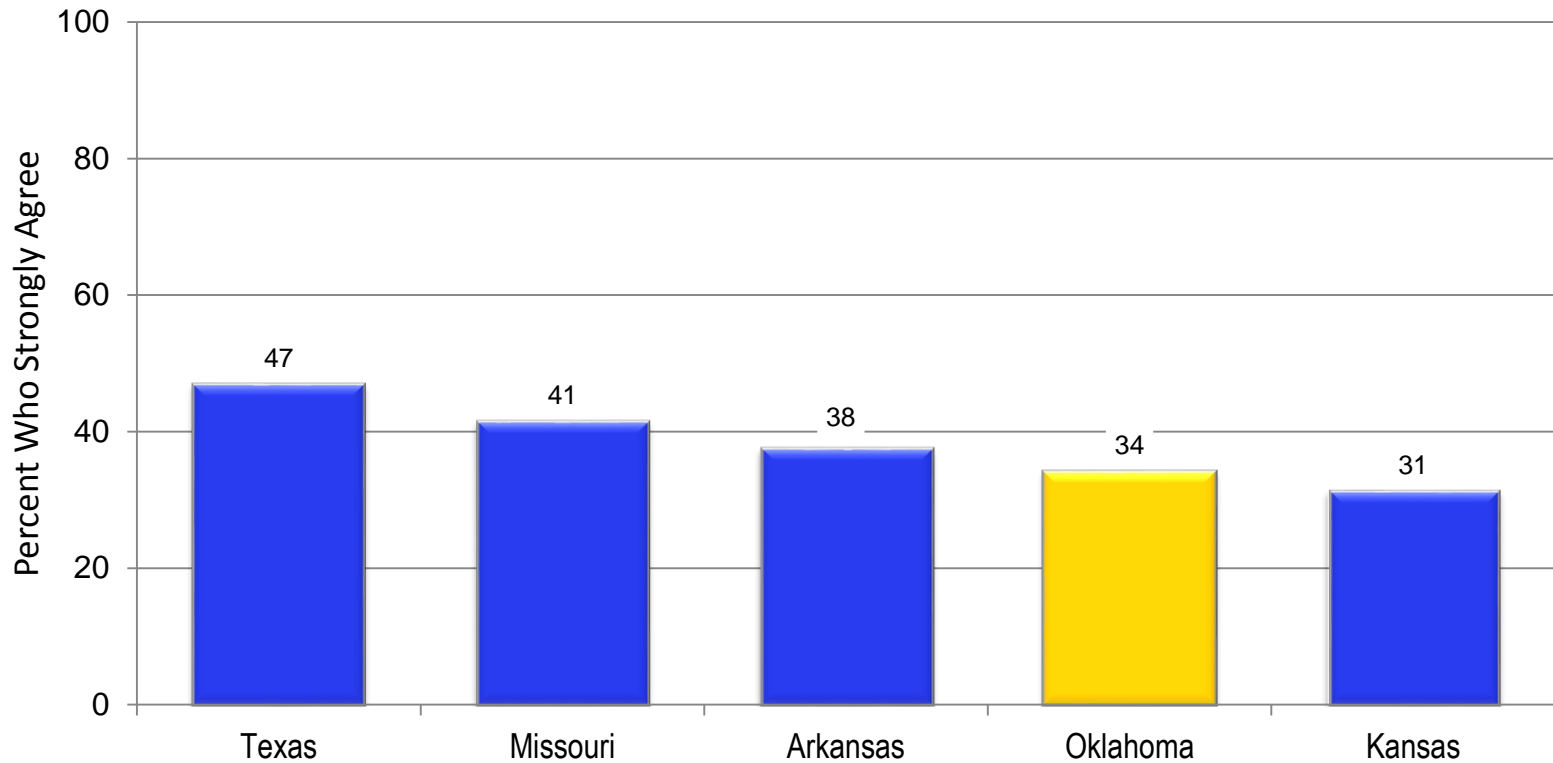
Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image vs. Competitors

## — Adult Destination



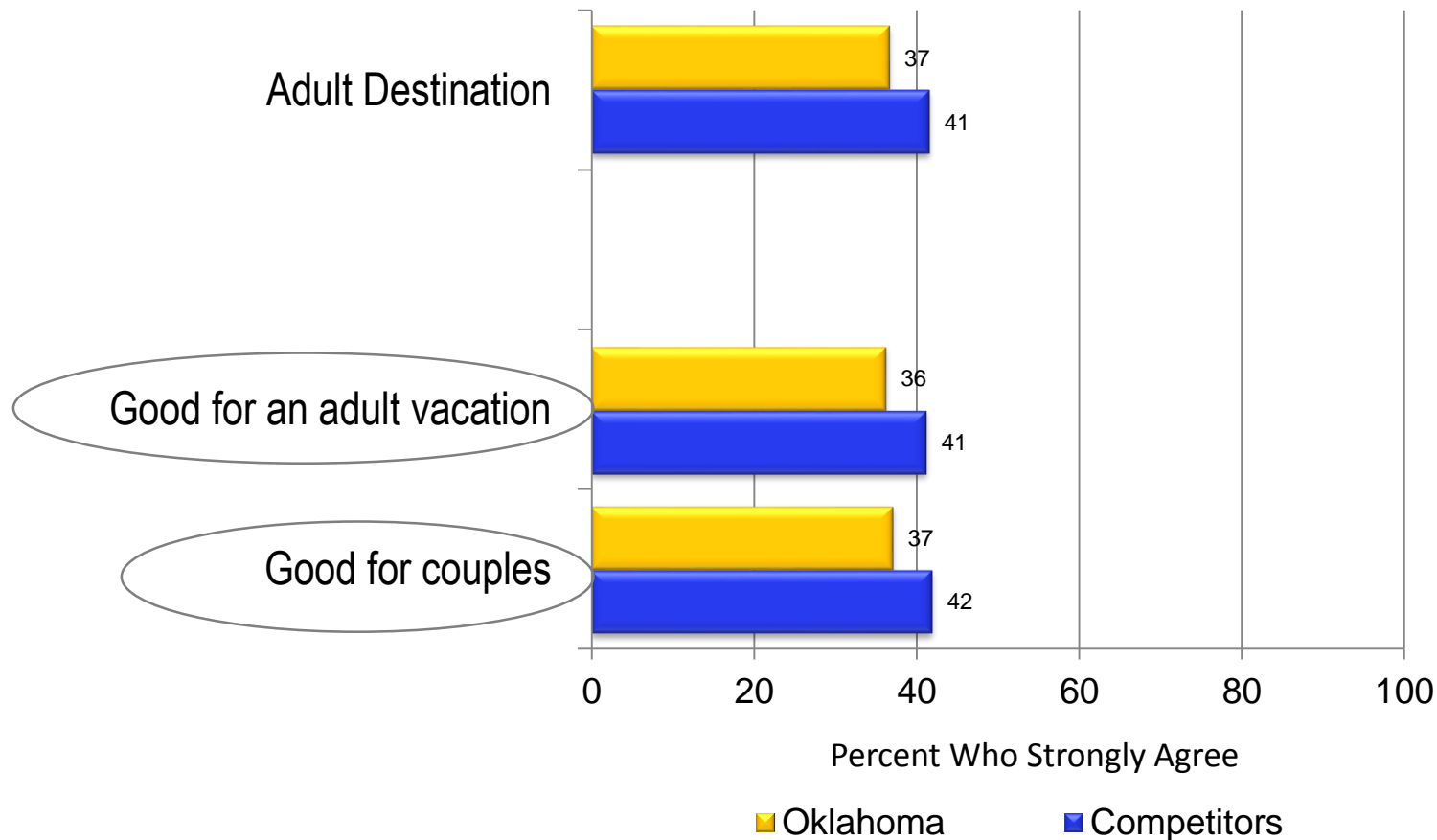
Base: Total Travelers



# Oklahoma Image vs. Competitors — Adult Destination



Base: Total Travelers

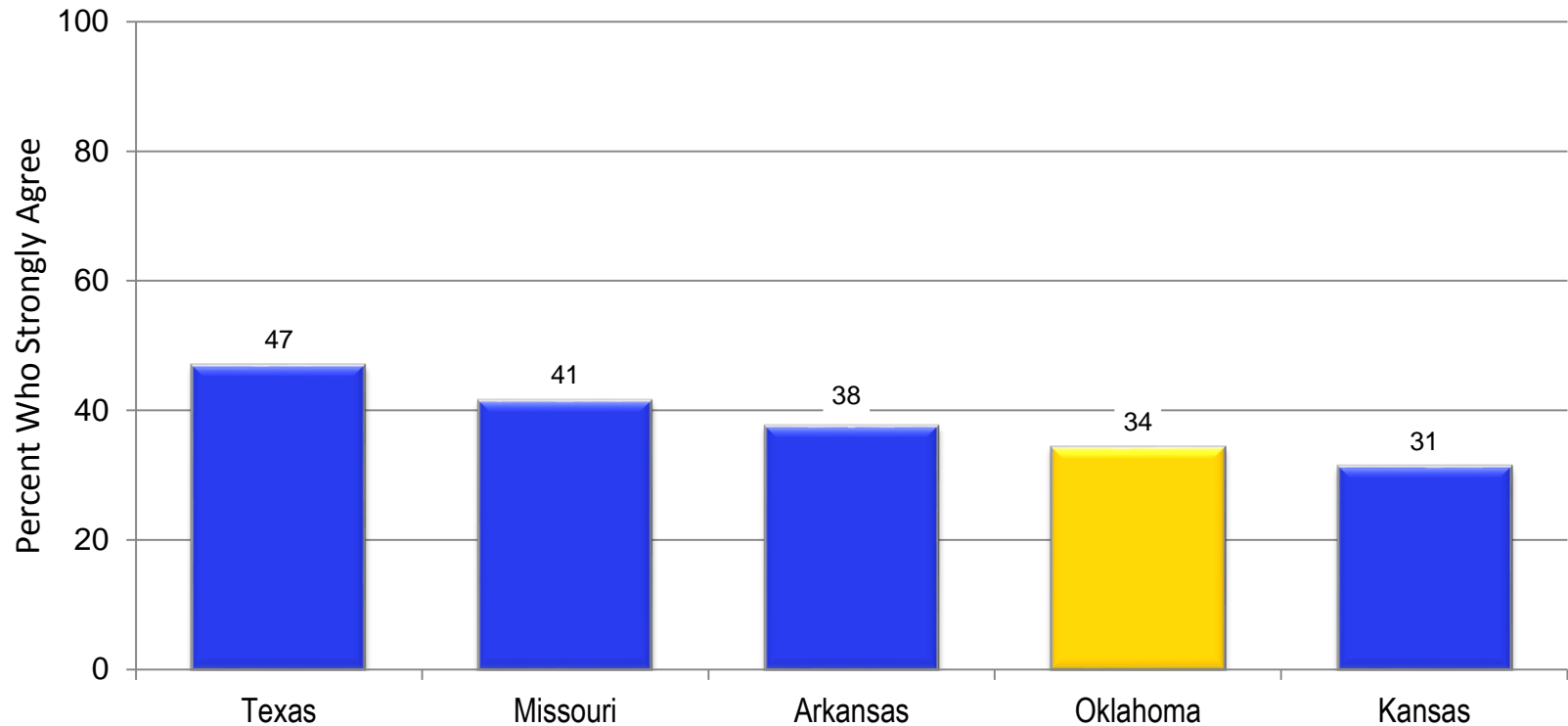


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image vs. Competitors — Family Atmosphere



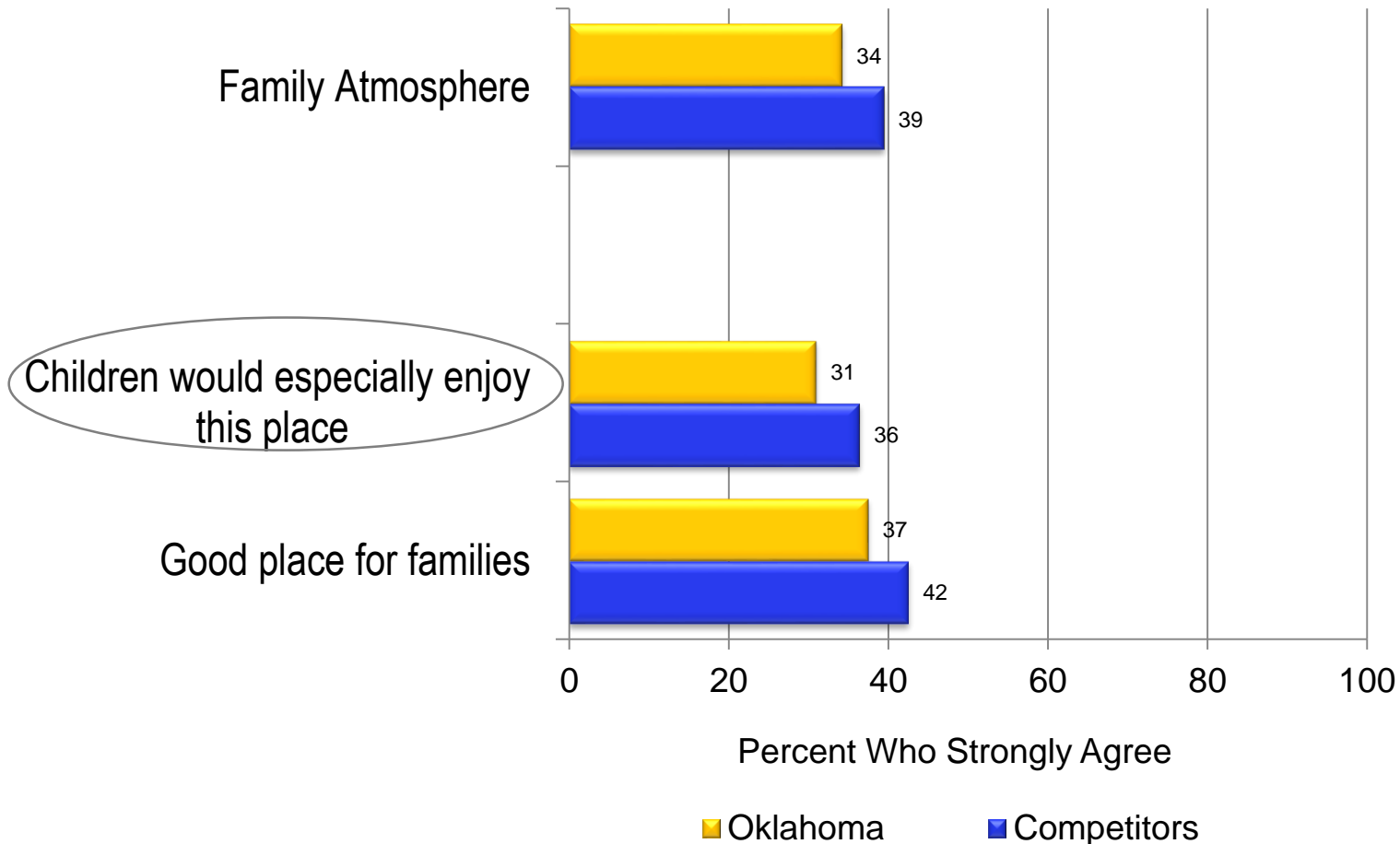
Base: Total Travelers



# Oklahoma Image vs. Competitors — Family Atmosphere



Base: Total Travelers

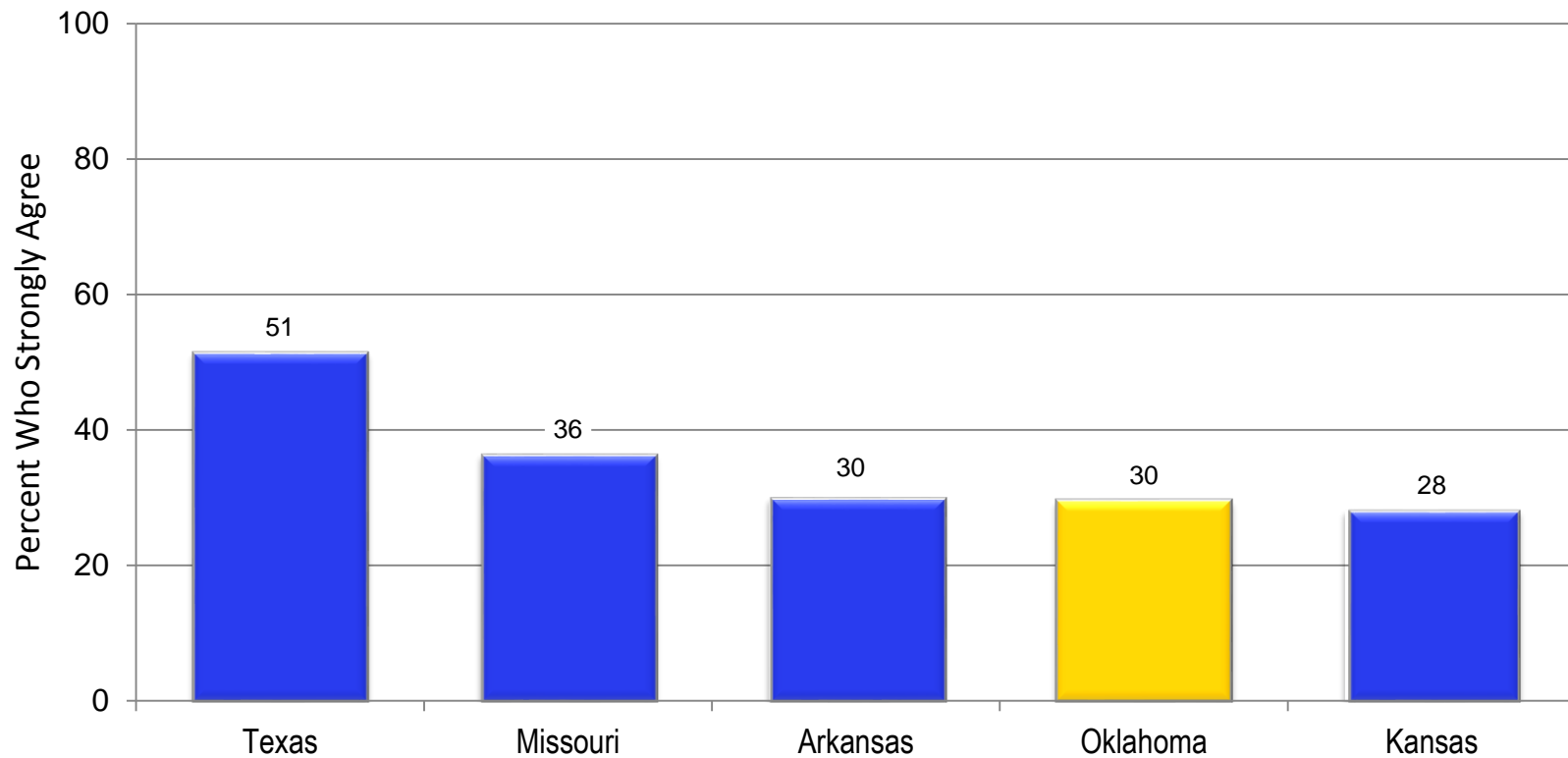


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image vs. Competitors — Luxurious



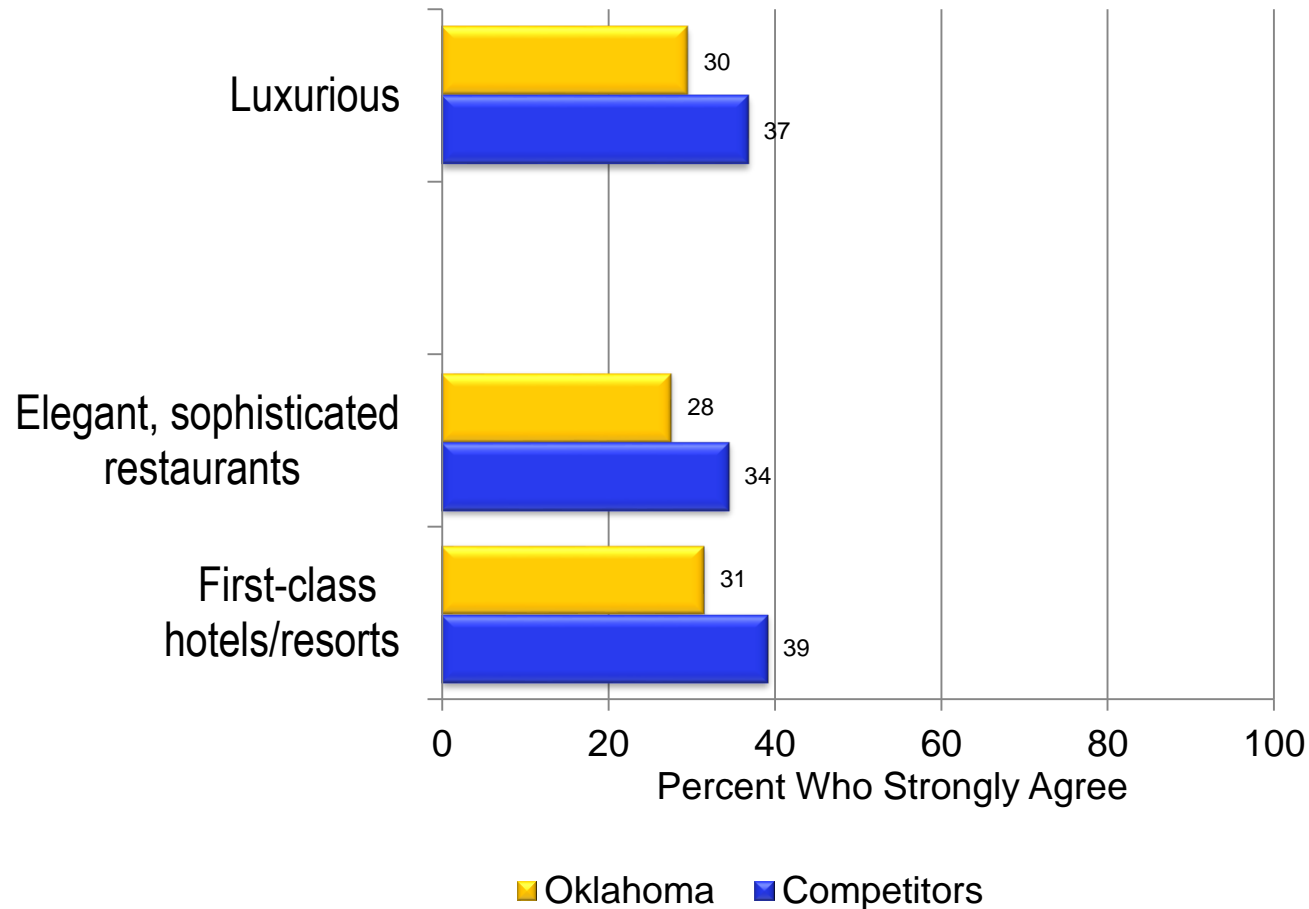
Base: Total Travelers



# Oklahoma Image vs. Competitors — Luxurious



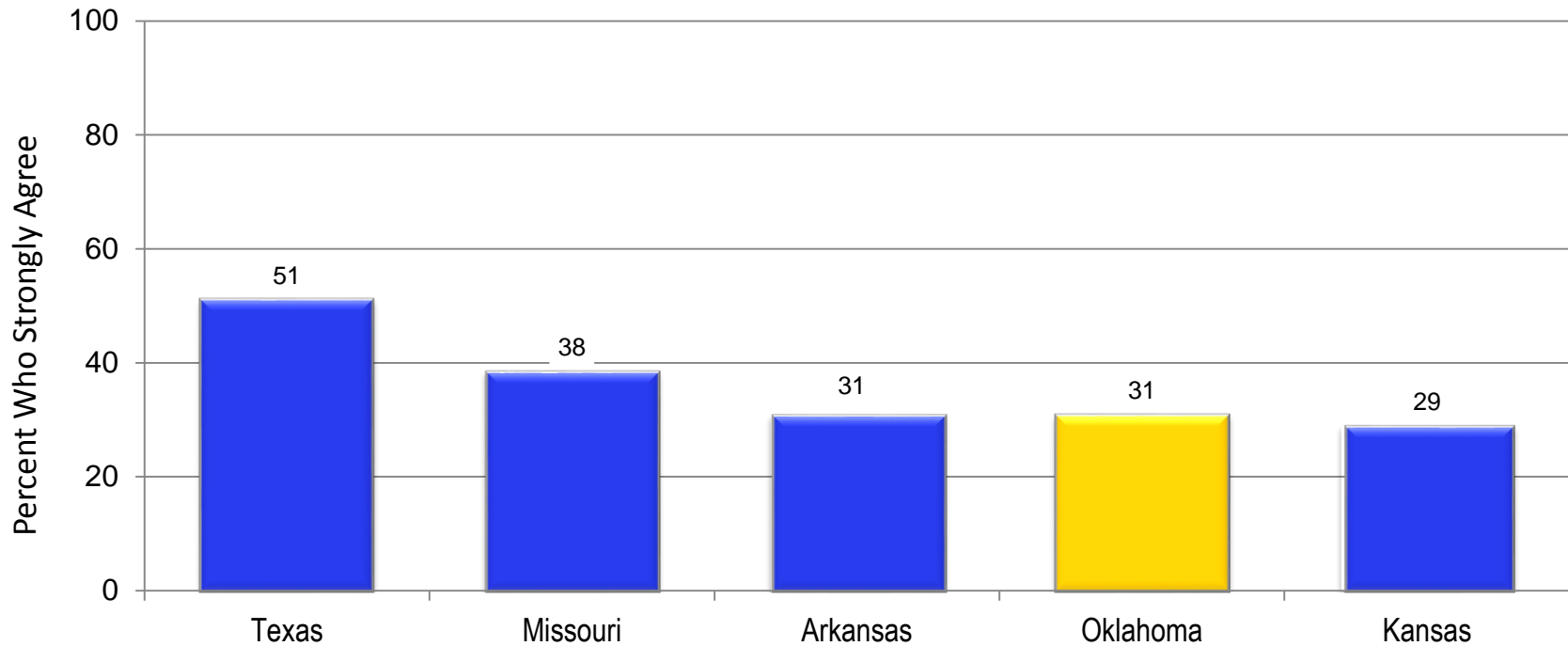
Base: Total Travelers



# Oklahoma Image vs. Competitors — Entertainment



Base: Total Travelers

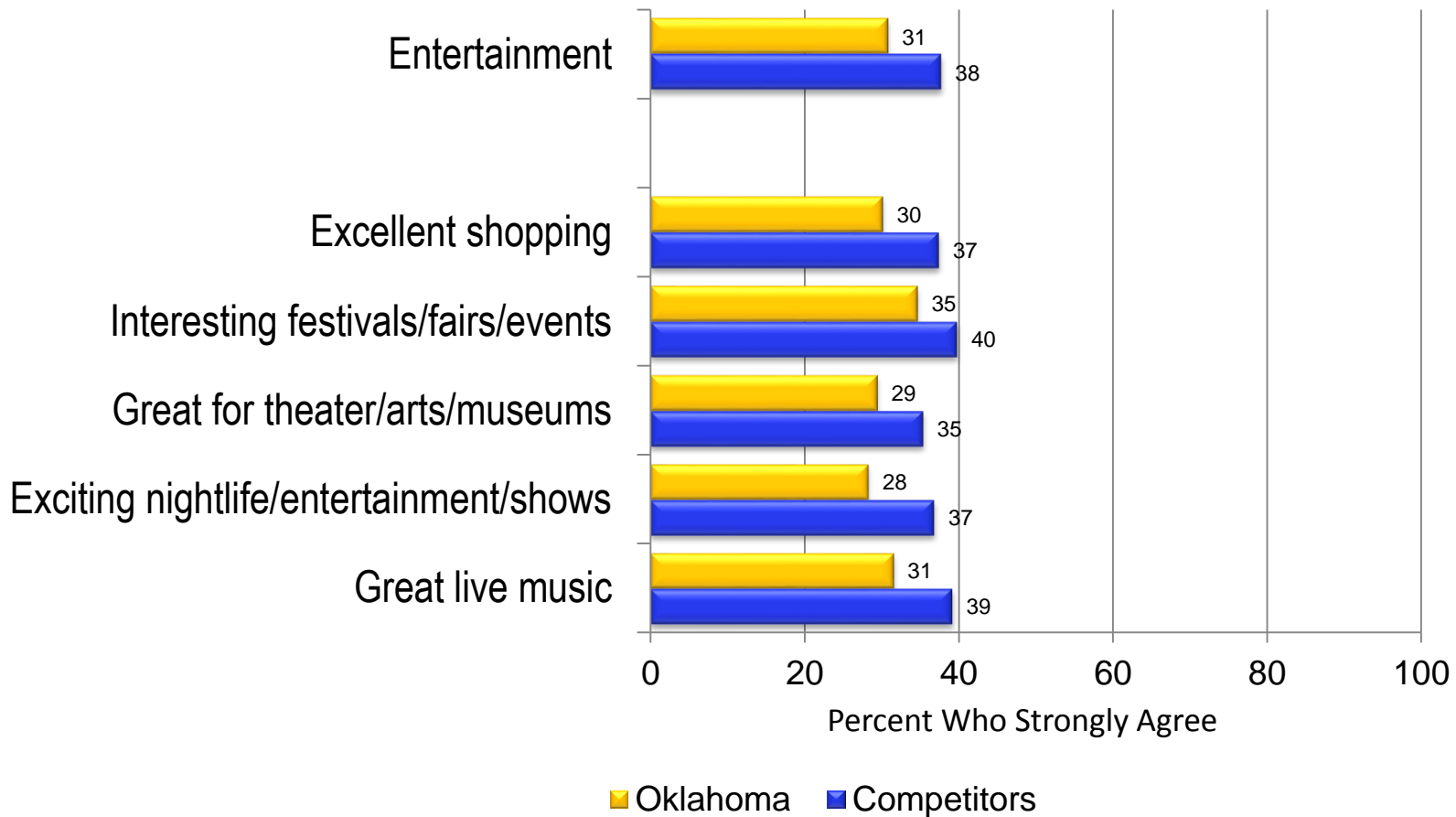




# Oklahoma Image vs. Competitors — Entertainment



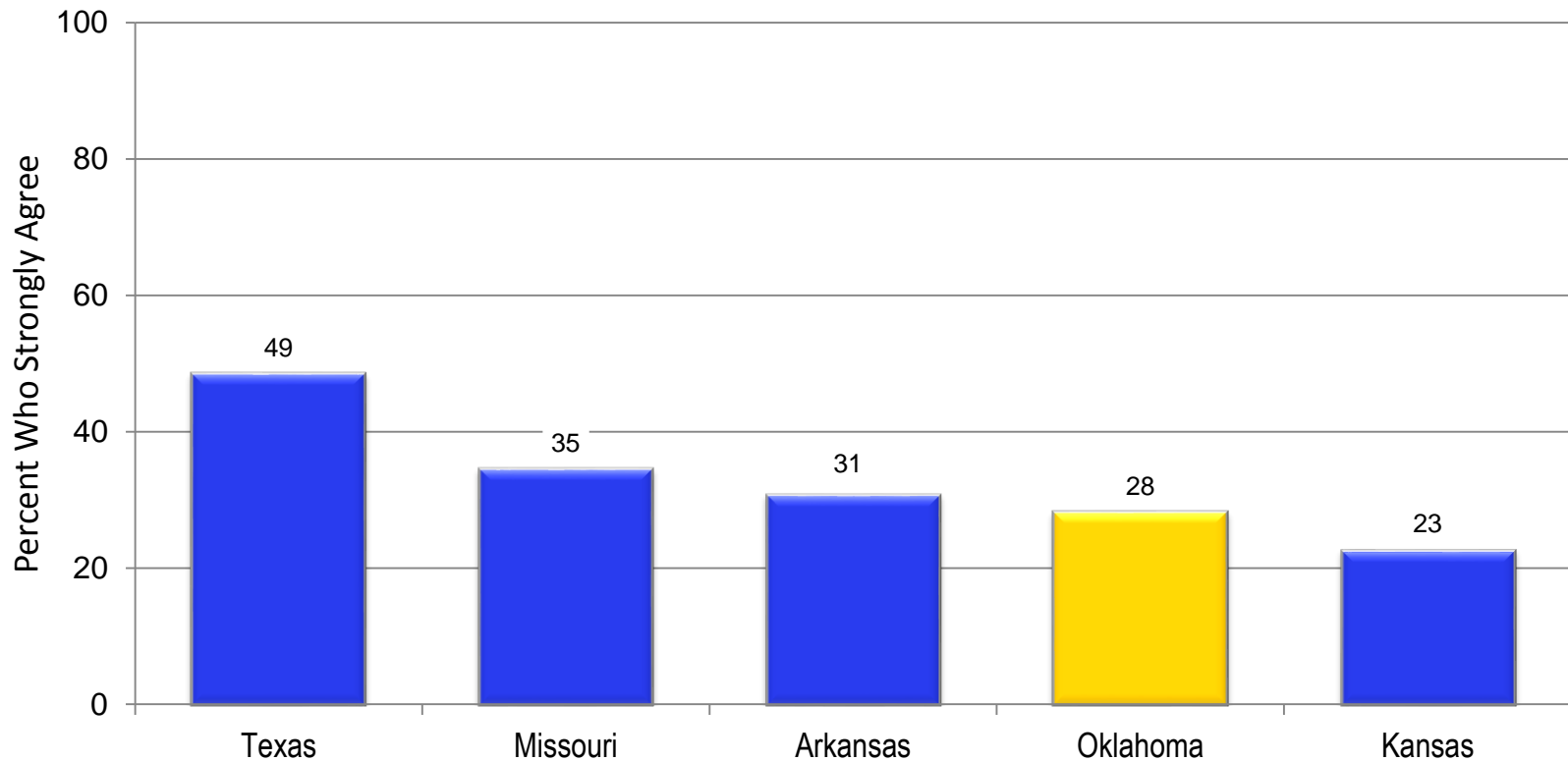
Base: Total Travelers



# Oklahoma Image vs. Competitors — Popular



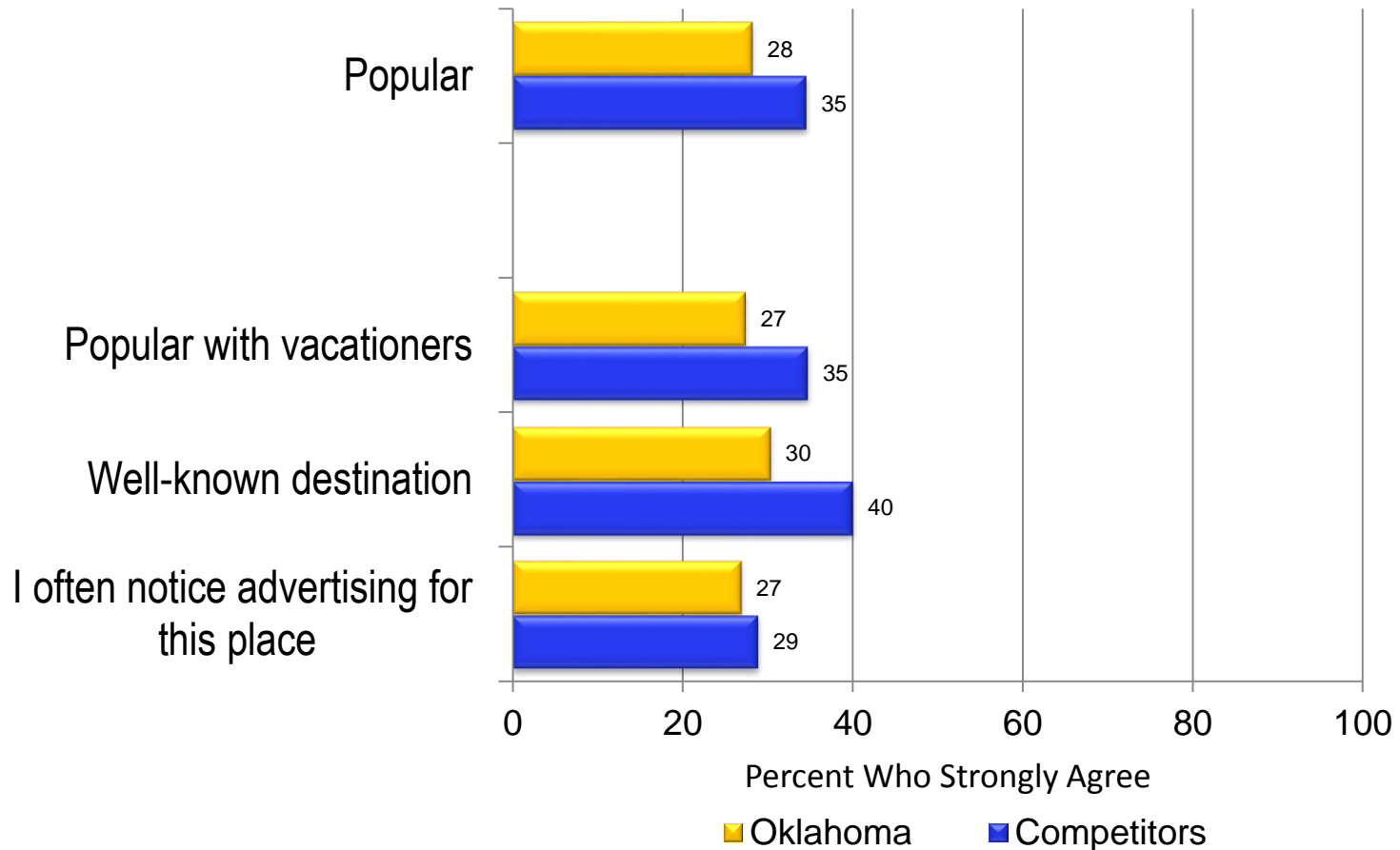
Base: Total Travelers



# Oklahoma Image vs. Competitors — Popular



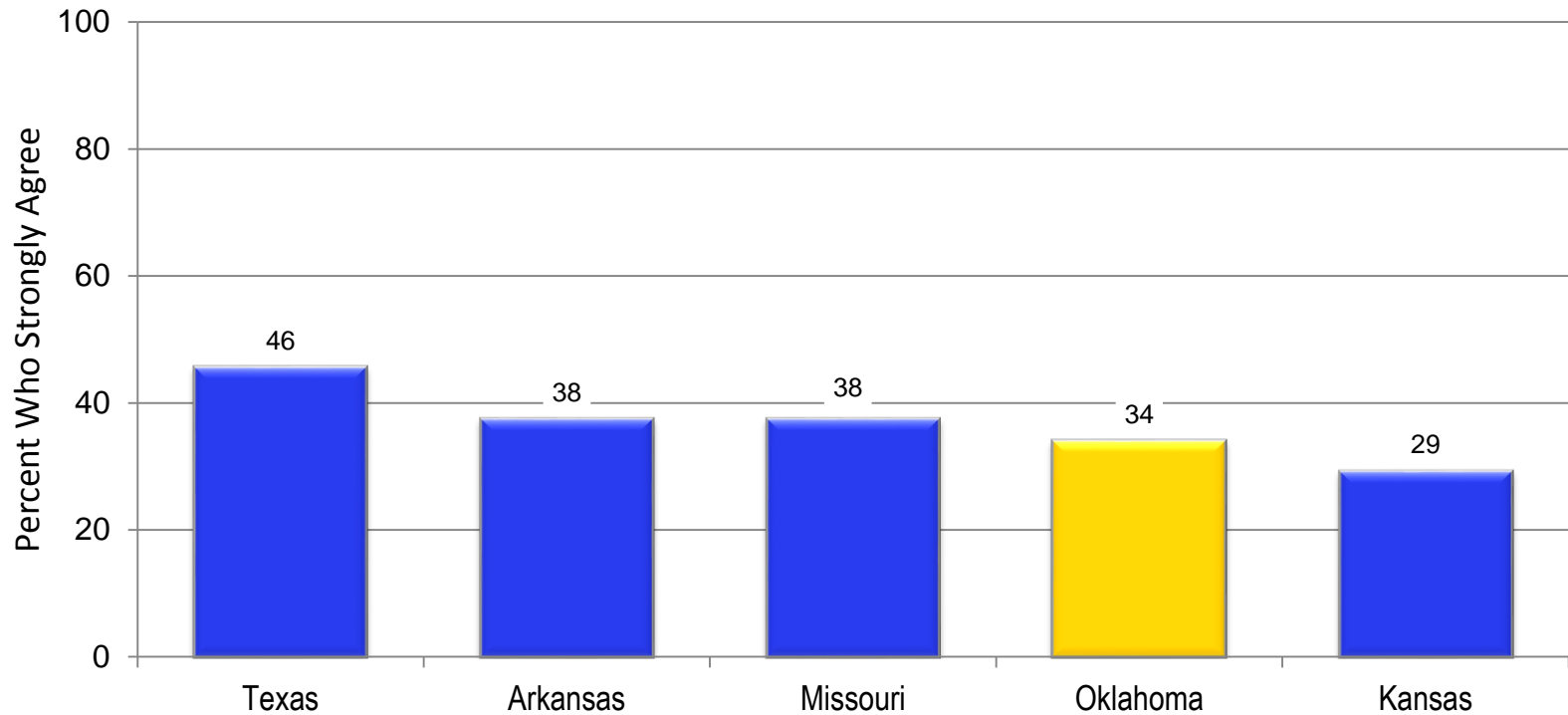
Base: Total Travelers



# Oklahoma Image vs. Competitors — Unique



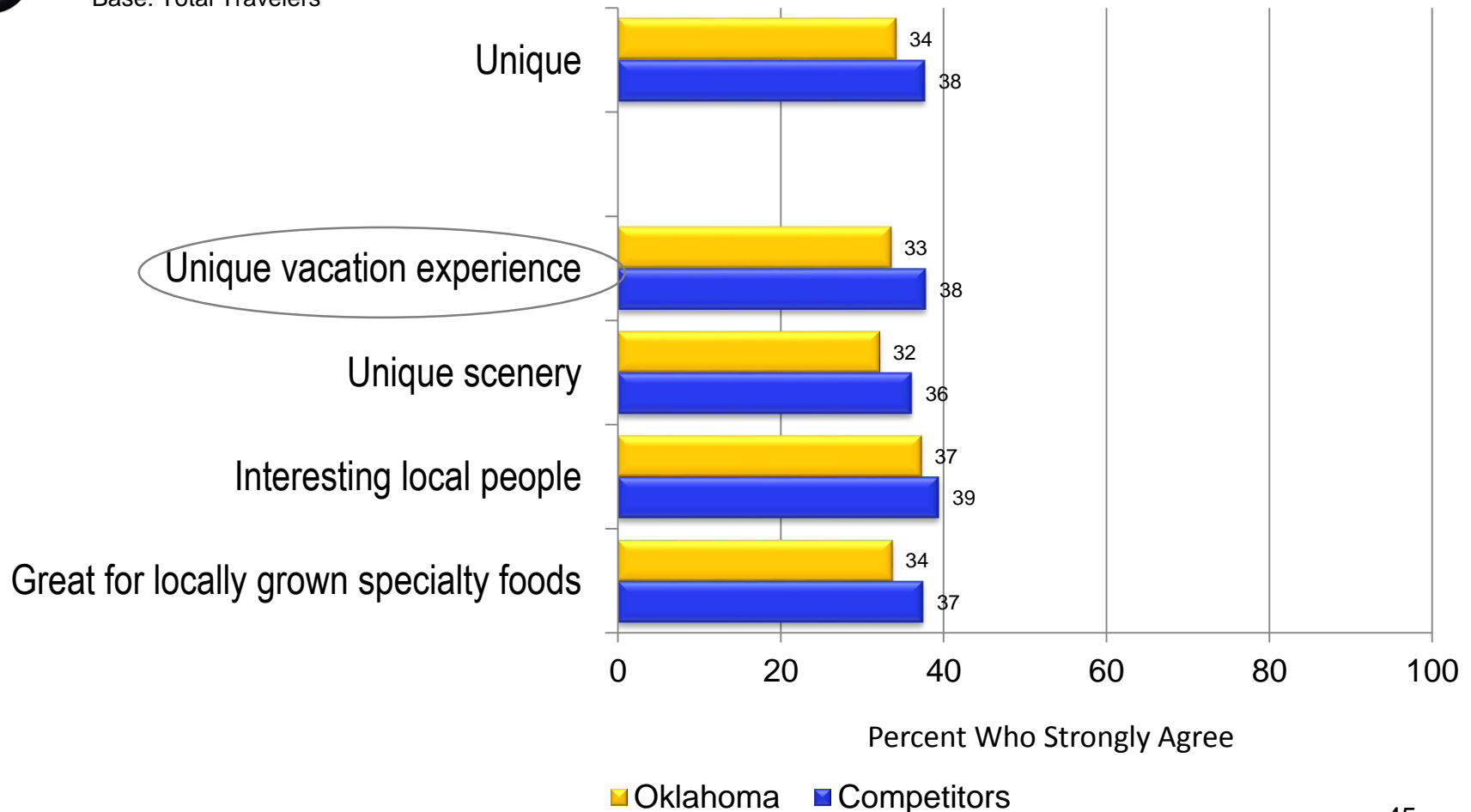
Base: Total Travelers



# Oklahoma Image vs. Competitors — Unique



Base: Total Travelers

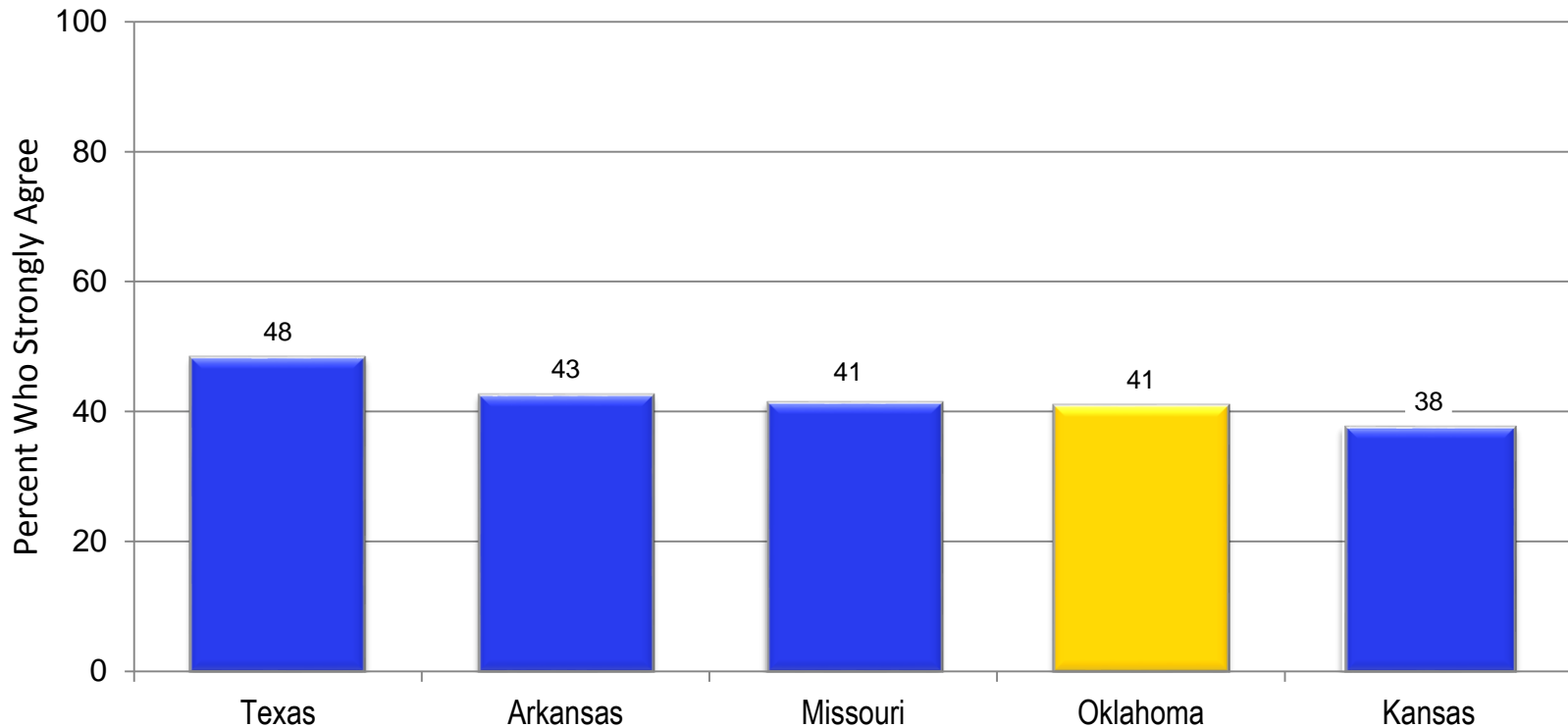


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image vs. Competitors — Worry Free



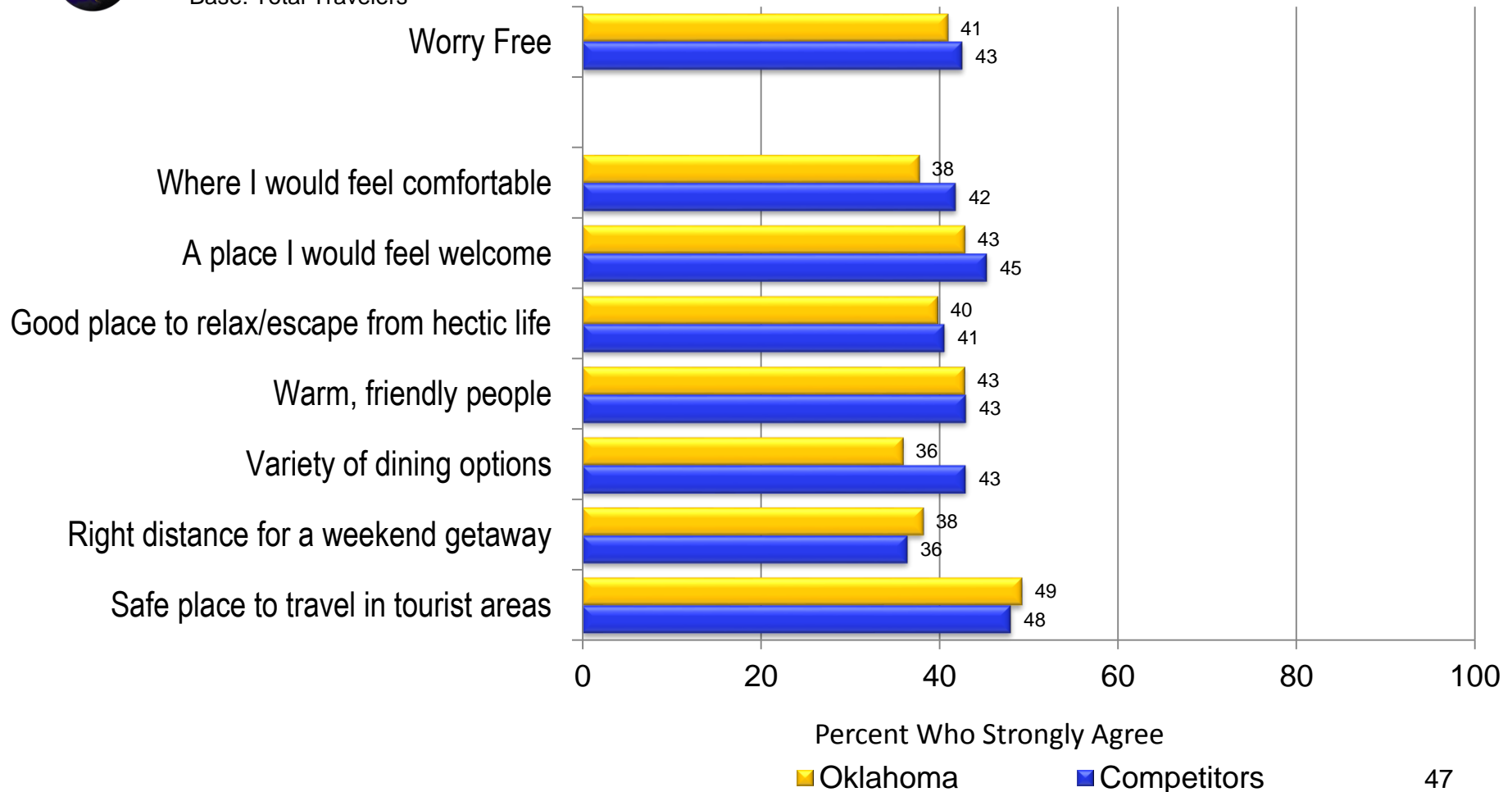
Base: Total Travelers



# Oklahoma Image vs. Competitors — Worry Free



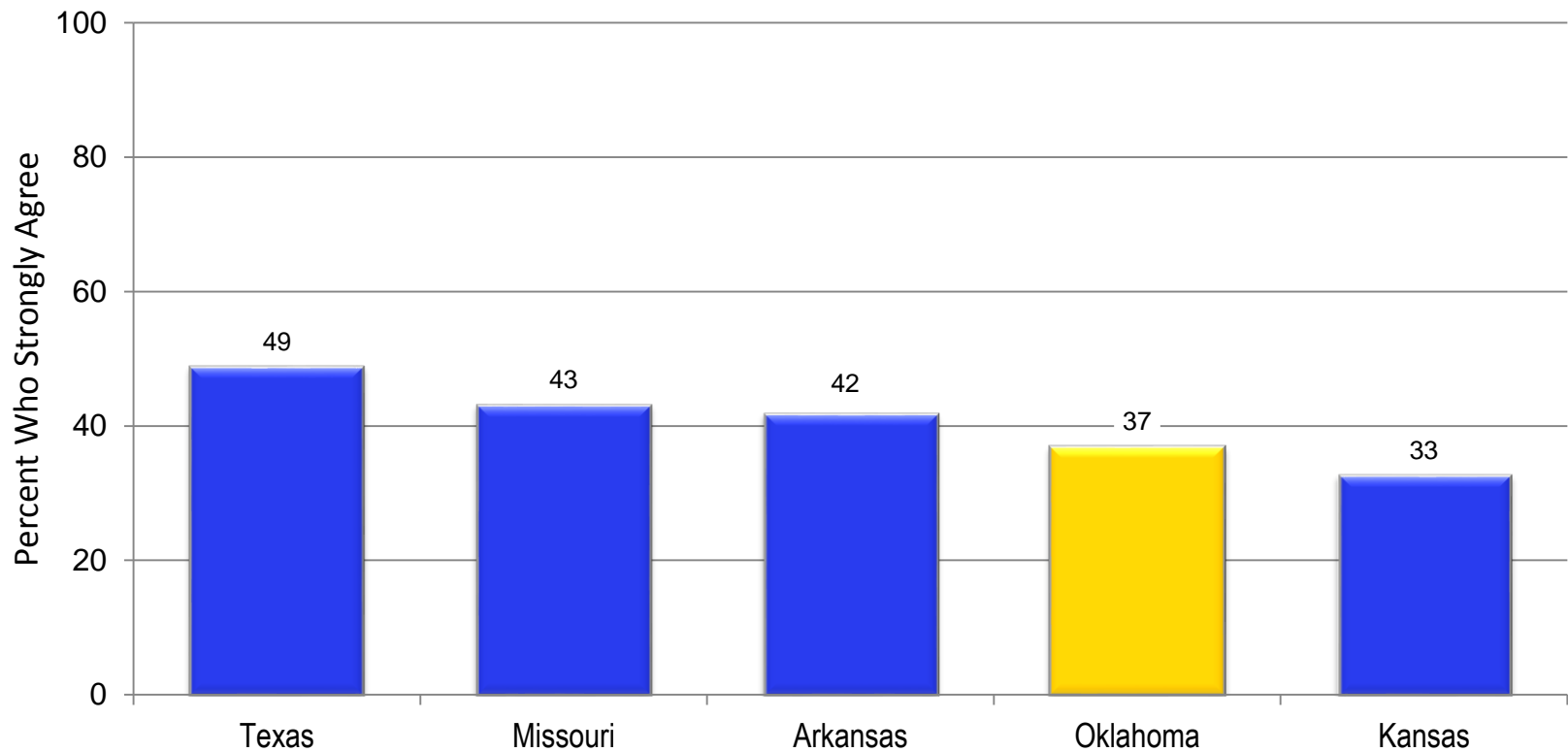
Base: Total Travelers



# Oklahoma Image vs. Competitors — Sightseeing



Base: Total Travelers

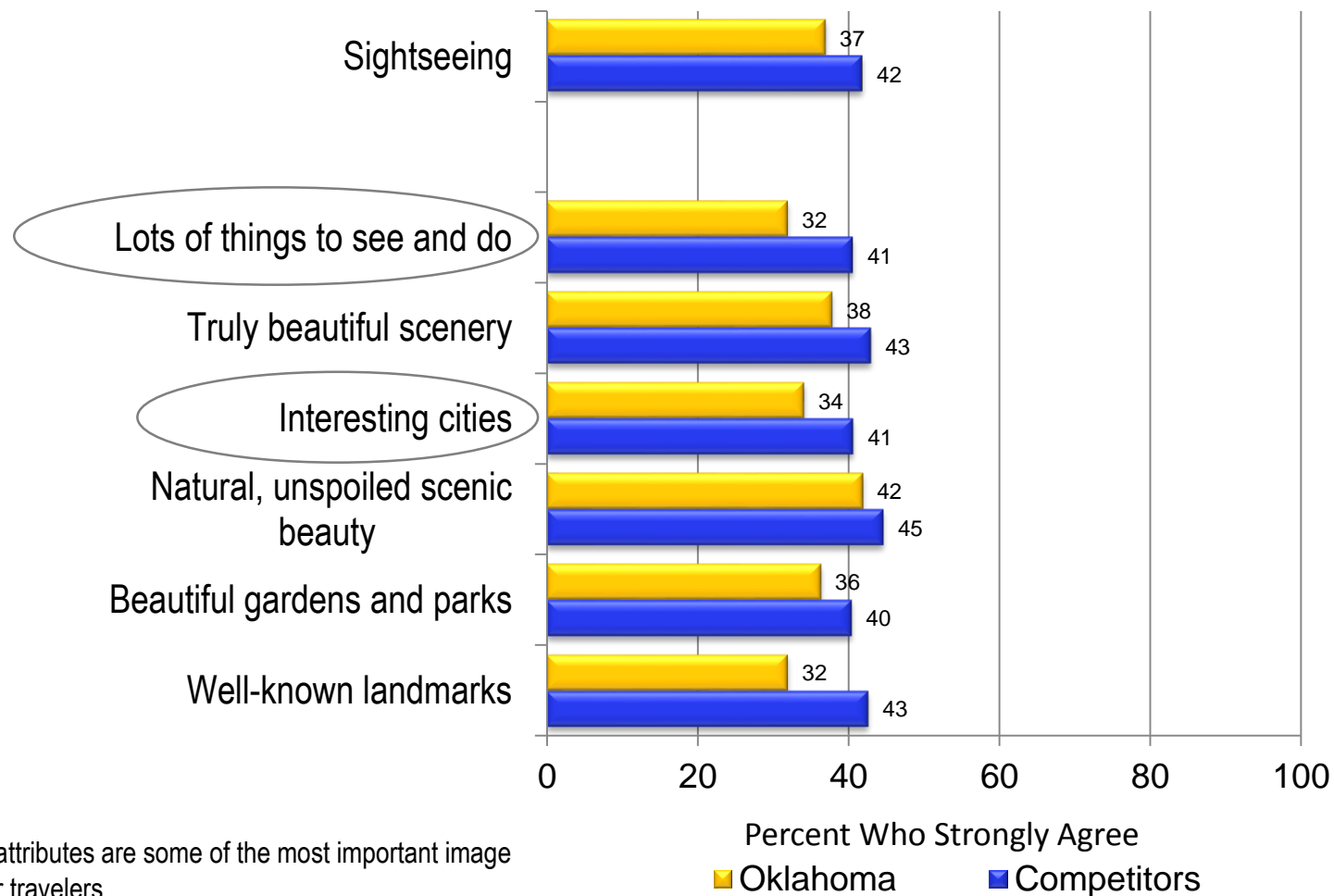




# Oklahoma Image vs. Competitors — Sightseeing



Base: Total Travelers



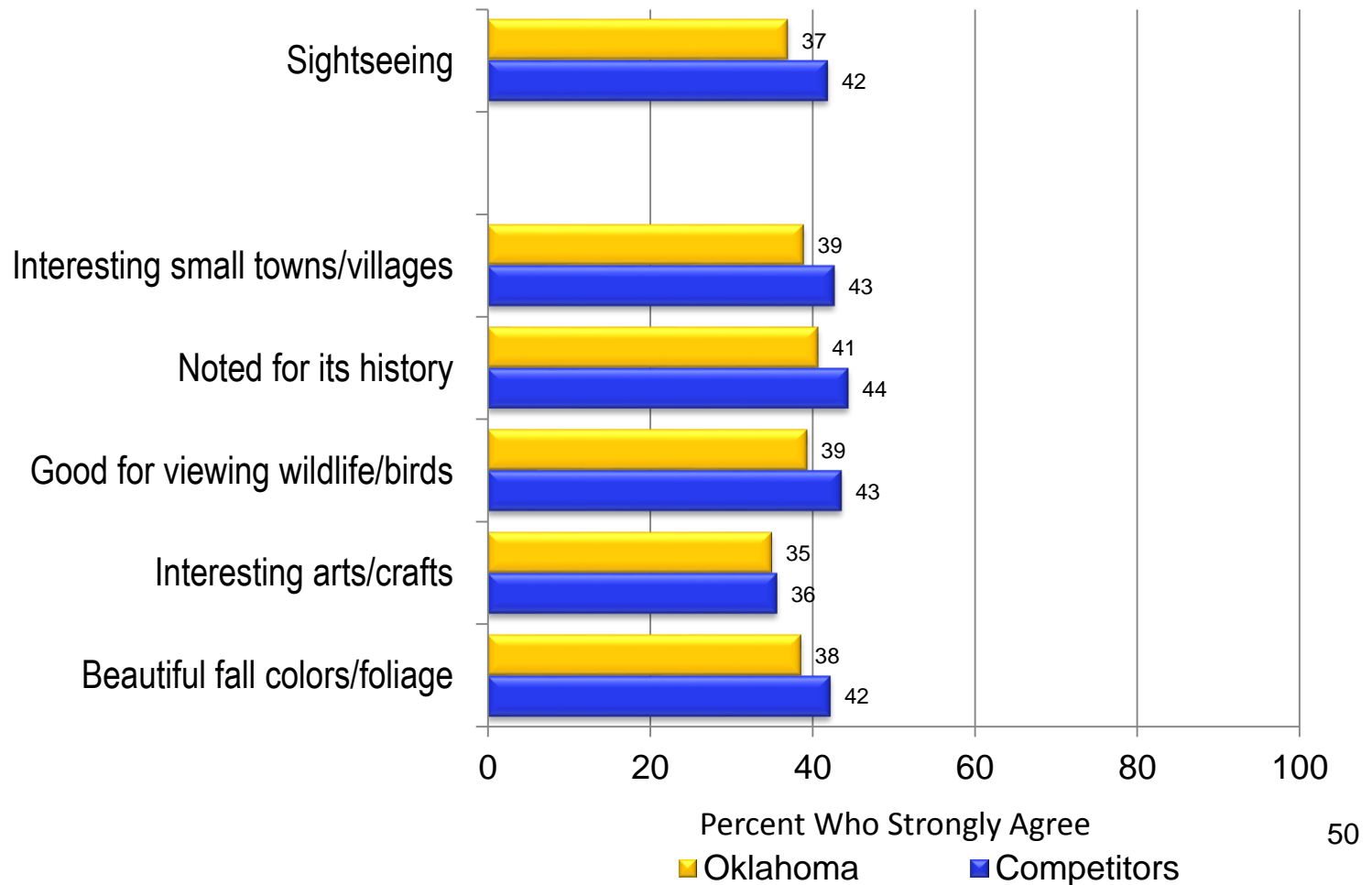
Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image vs. Competitors

## — Sightseeing – Cont'd



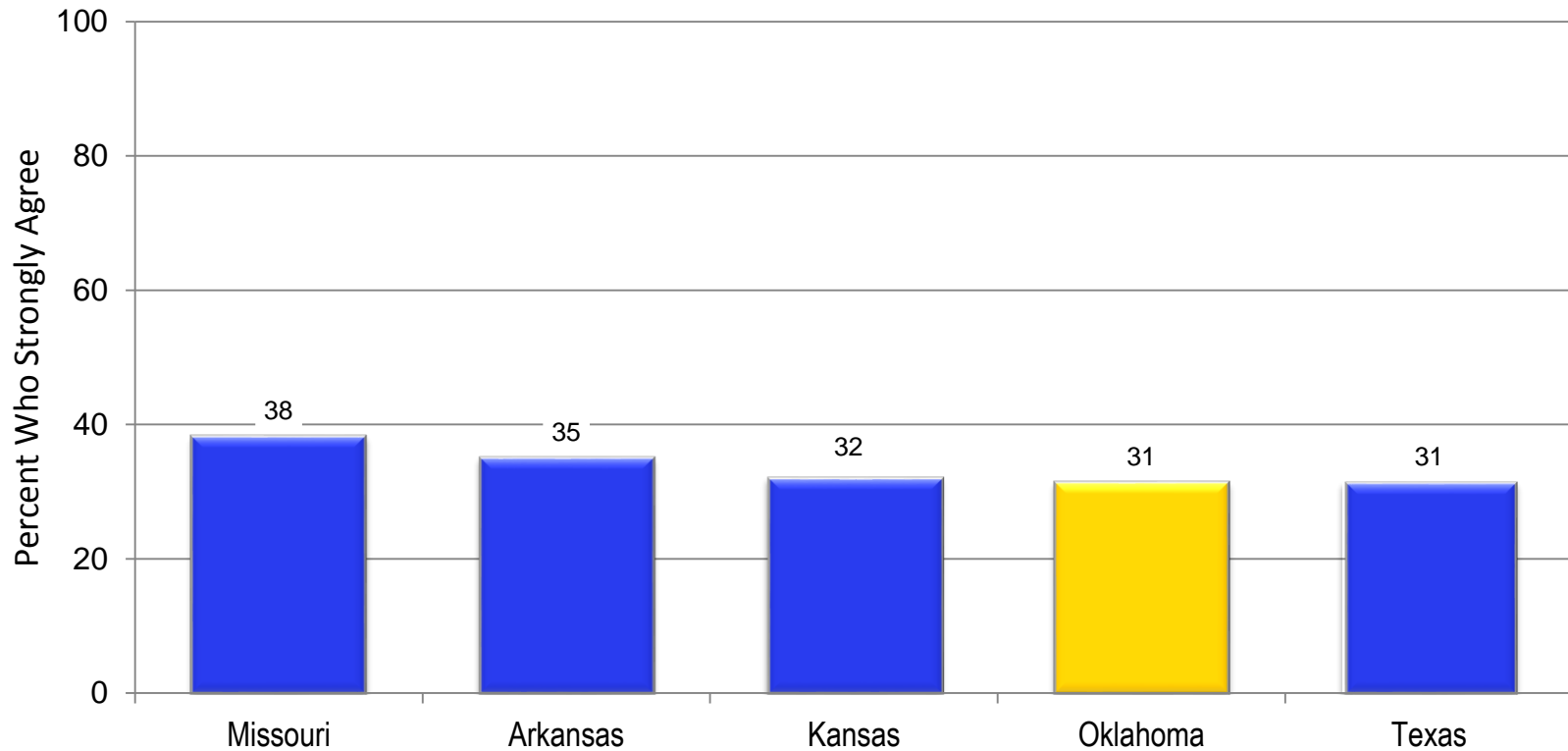
Base: Total Travelers



# Oklahoma Image vs. Competitors — Climate



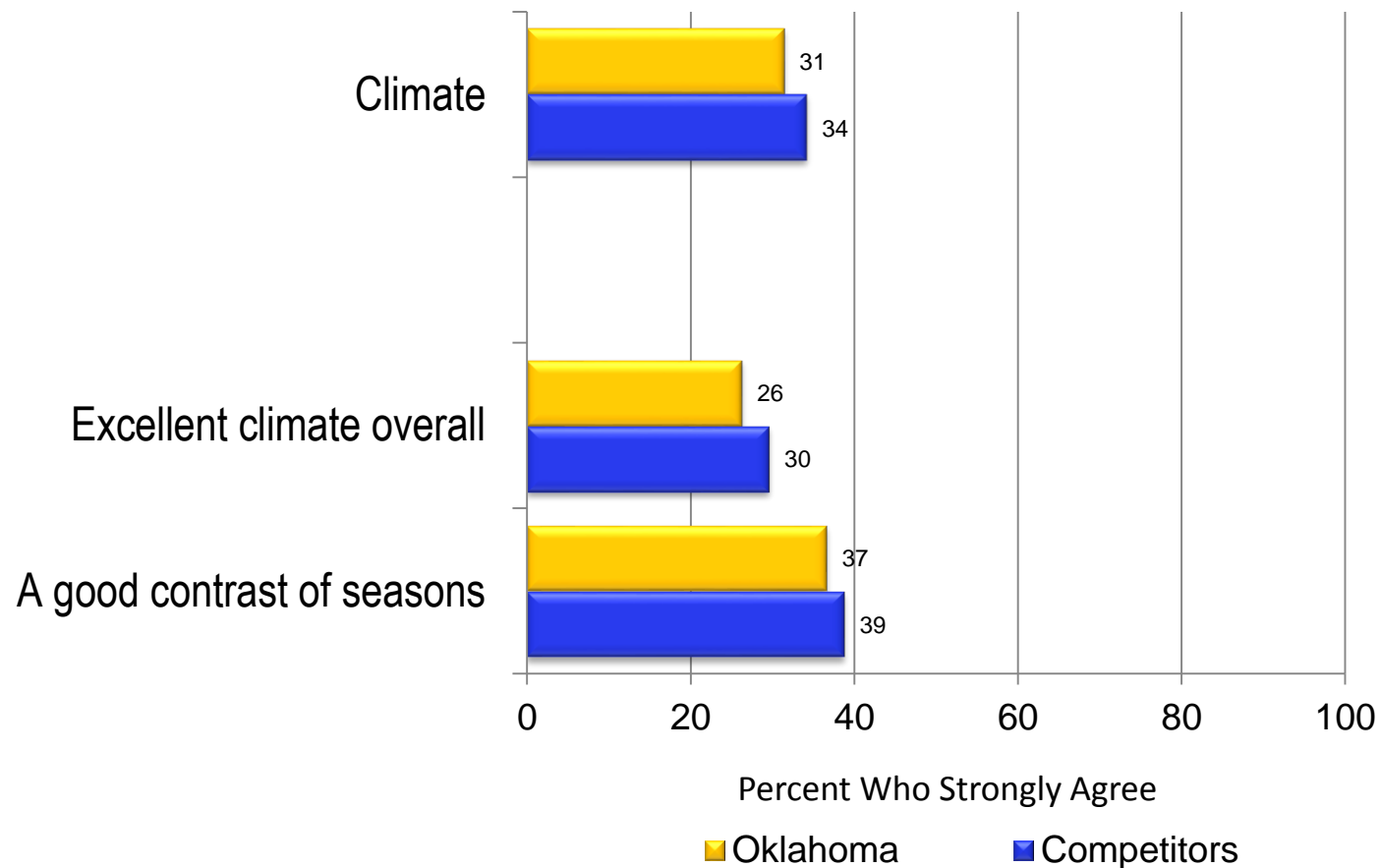
Base: Total Travelers



# Oklahoma Image vs. Competitors — Climate



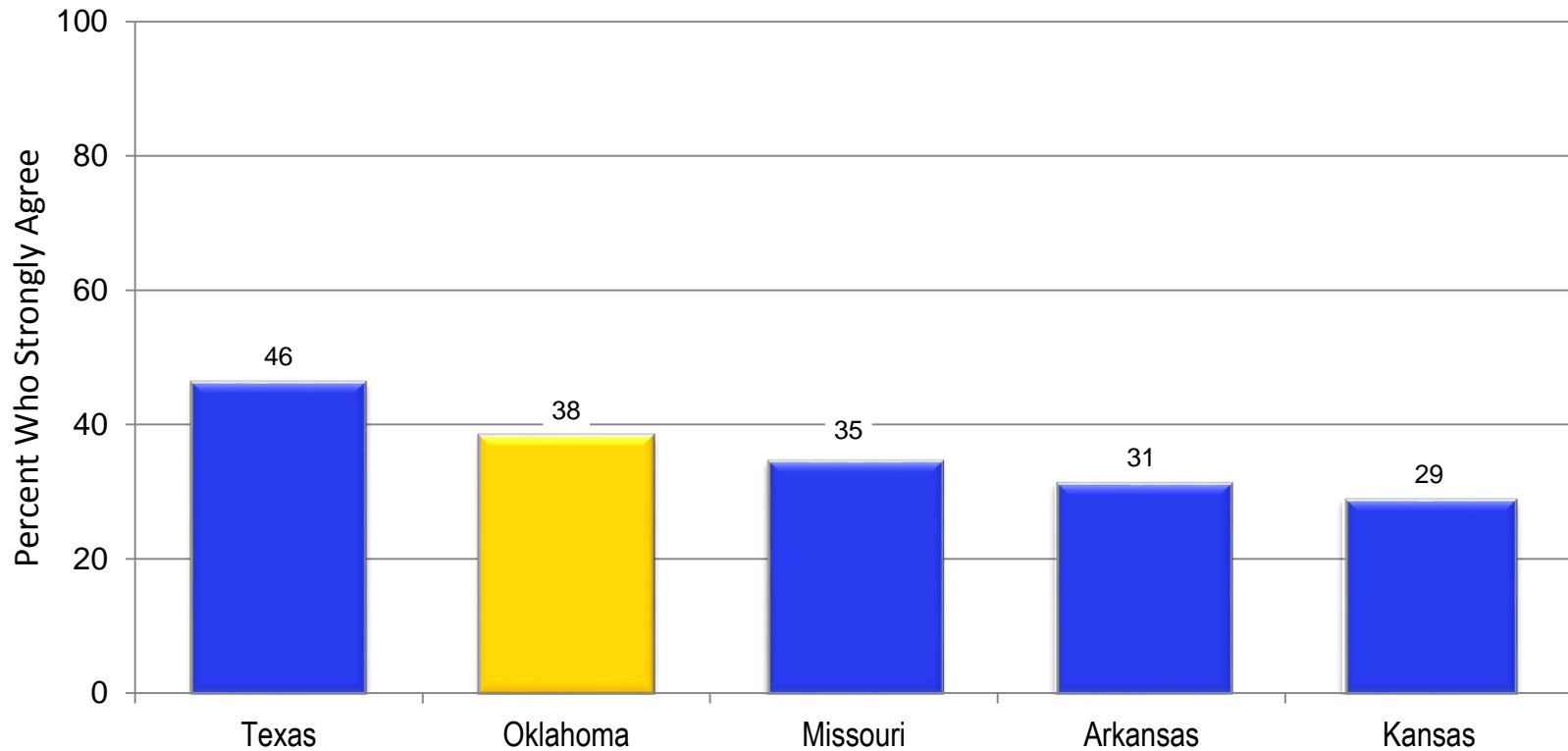
Base: Total Travelers



# Oklahoma Image vs. Competitors — Experiences



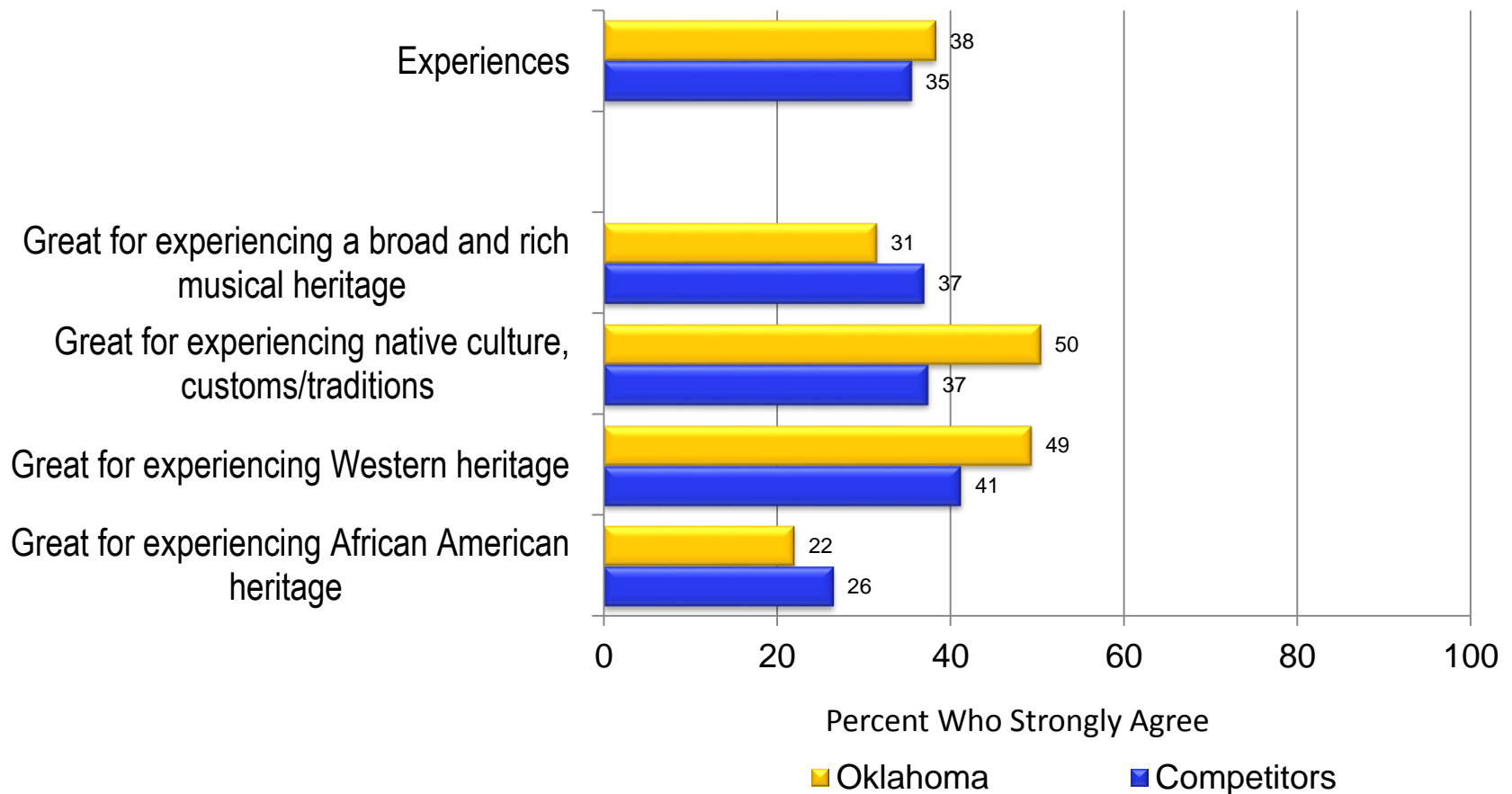
Base: Total Travelers



# Oklahoma Image vs. Competitors — Experiences



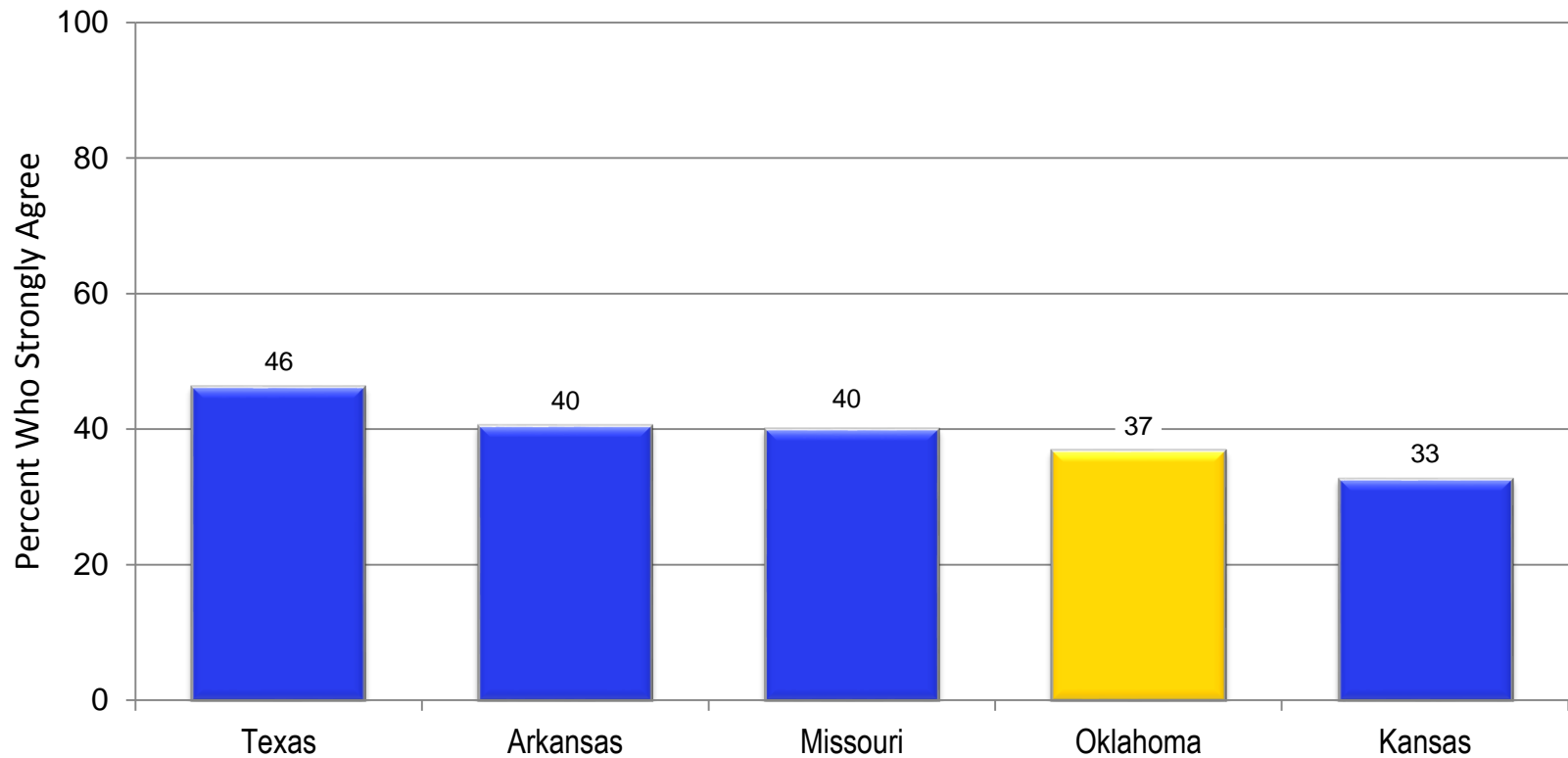
Base: Total Travelers



# Oklahoma Image vs. Competitors — Sports and Recreation



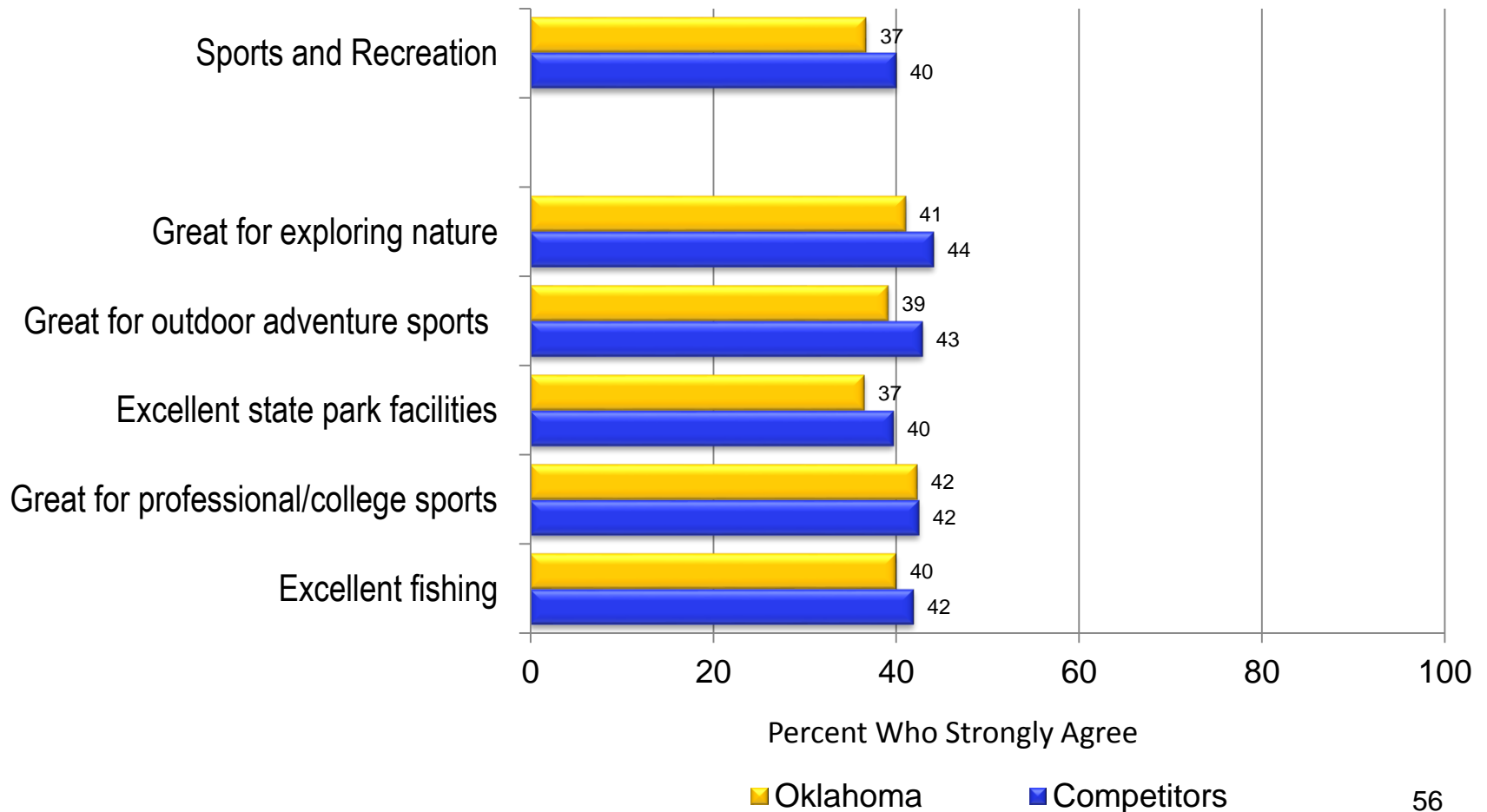
Base: Total Travelers



# Oklahoma Image vs. Competitors — Sports and Recreation



Base: Total Travelers

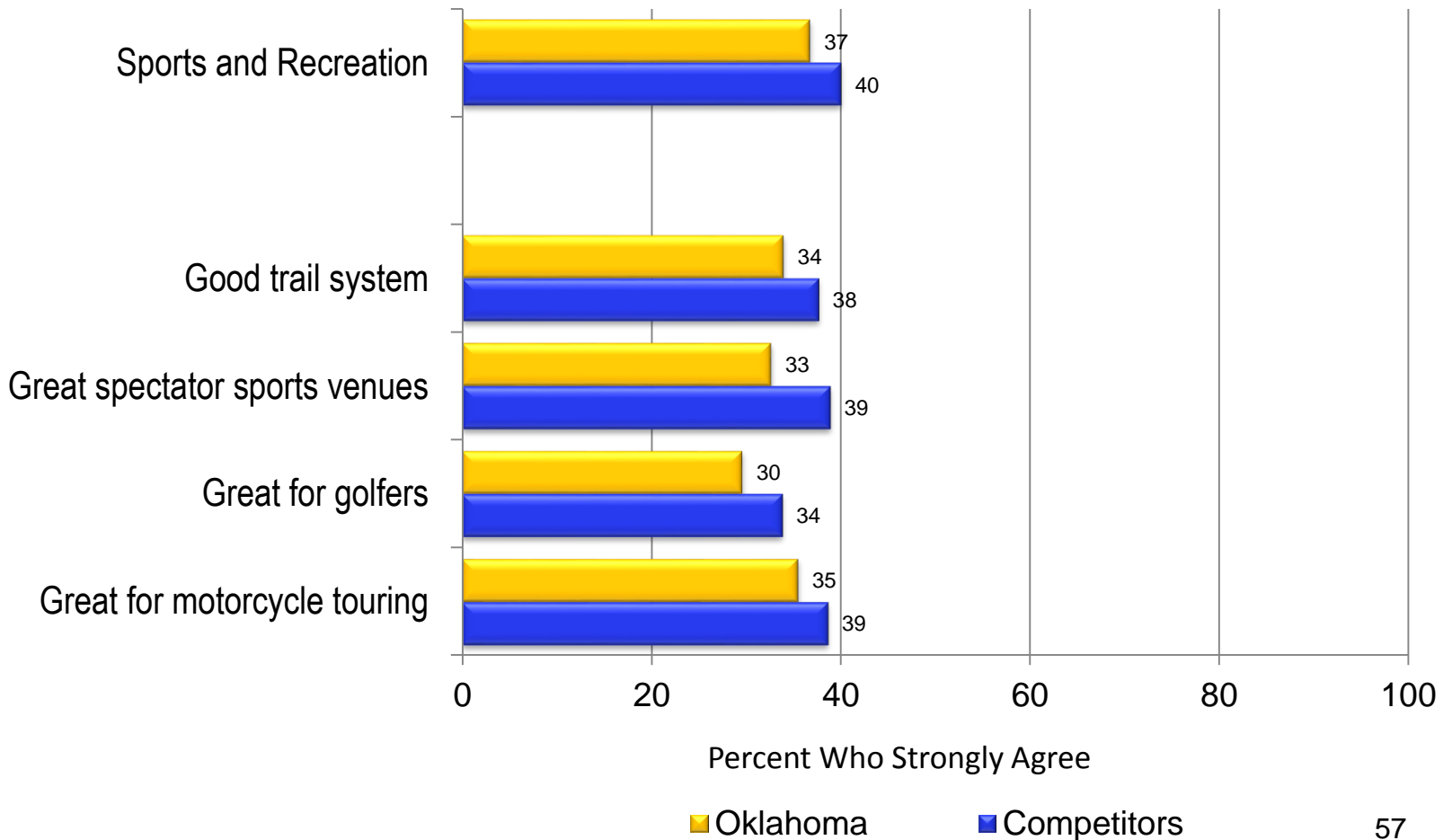




# Oklahoma Image vs. Competitors — Sports and Recreation – Cont'd



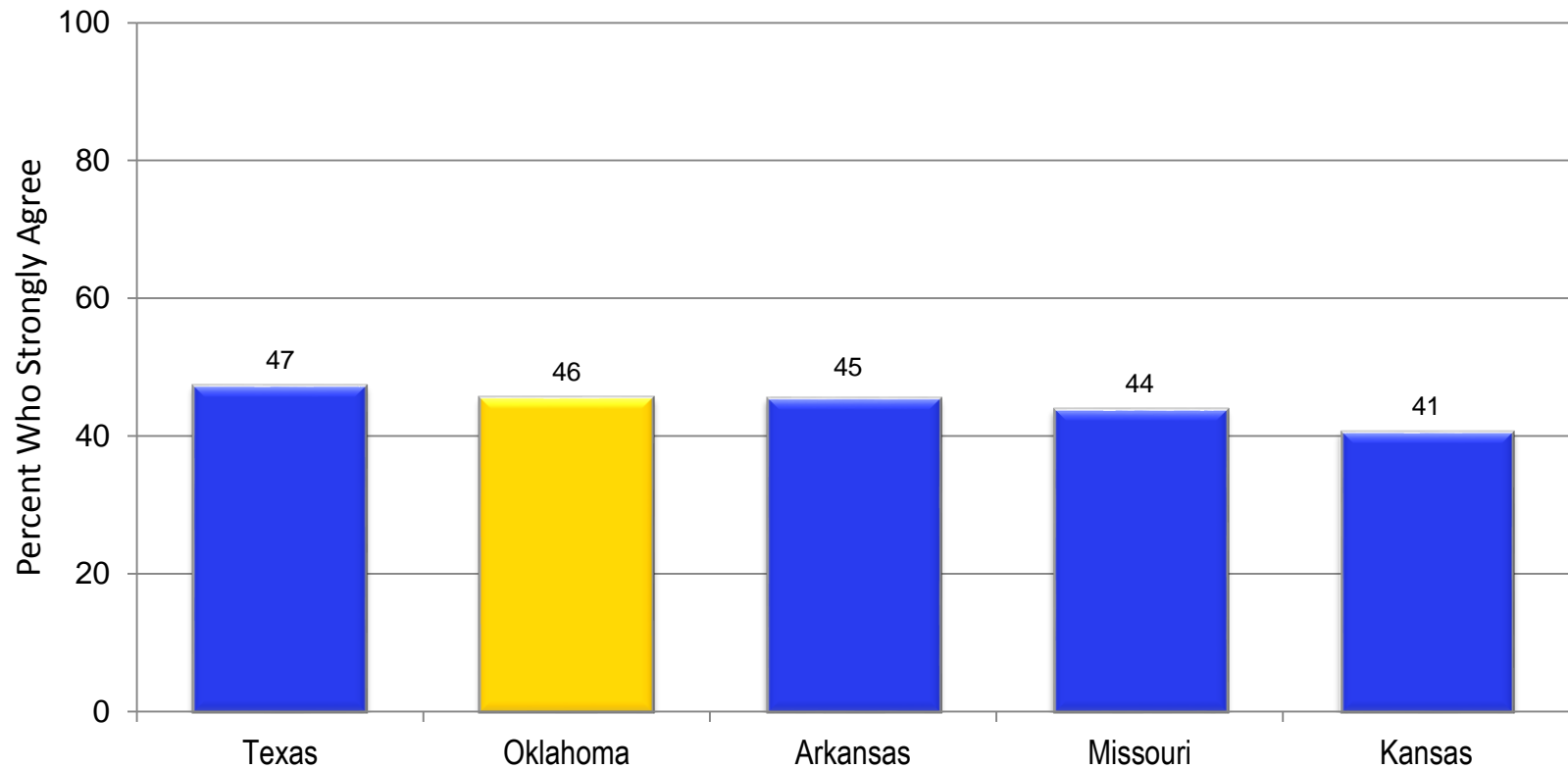
Base: Total Travelers



# Oklahoma Image vs. Competitors — Affordable



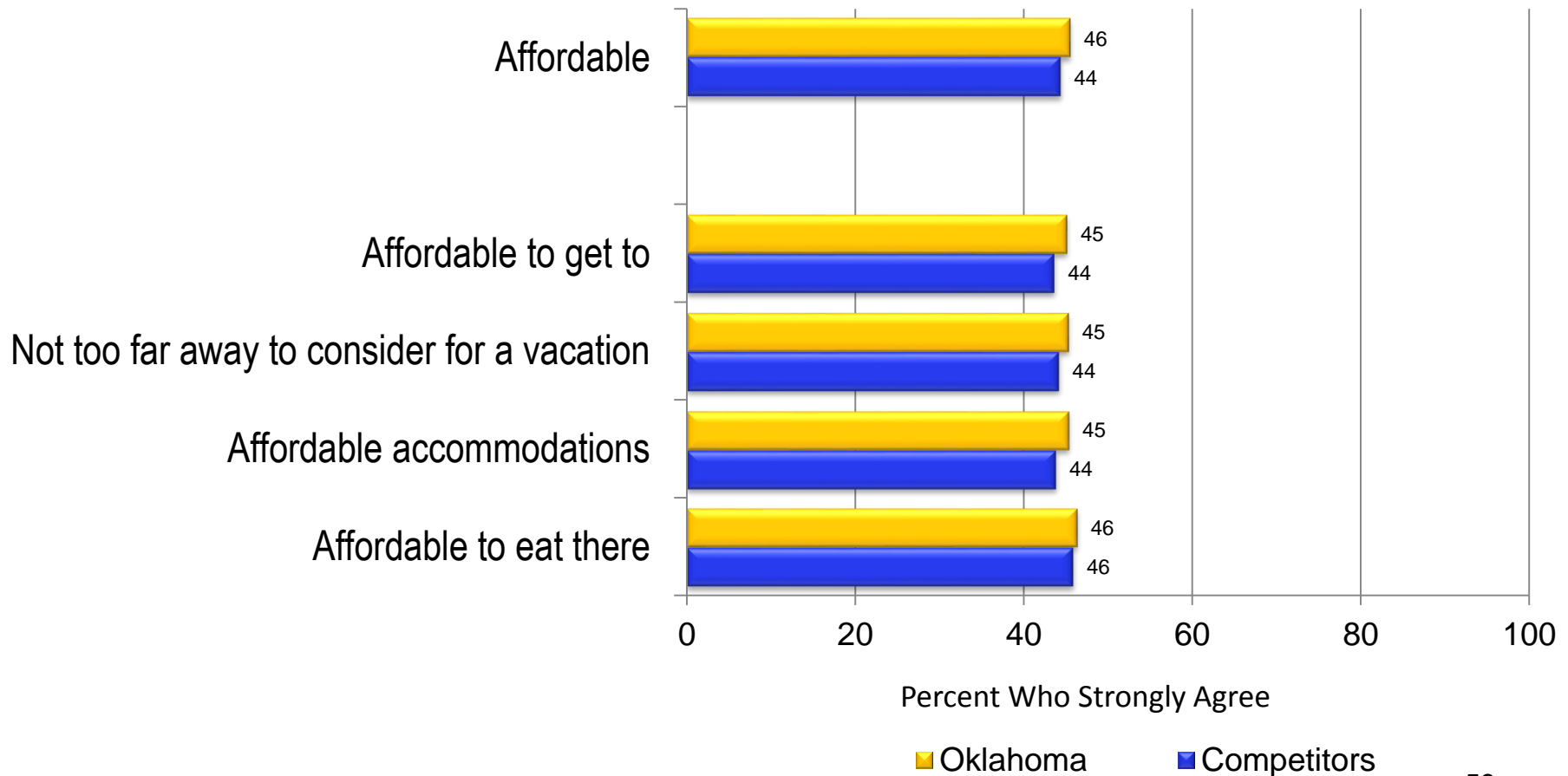
Base: Total Travelers



# Oklahoma Image vs. Competitors — Affordable



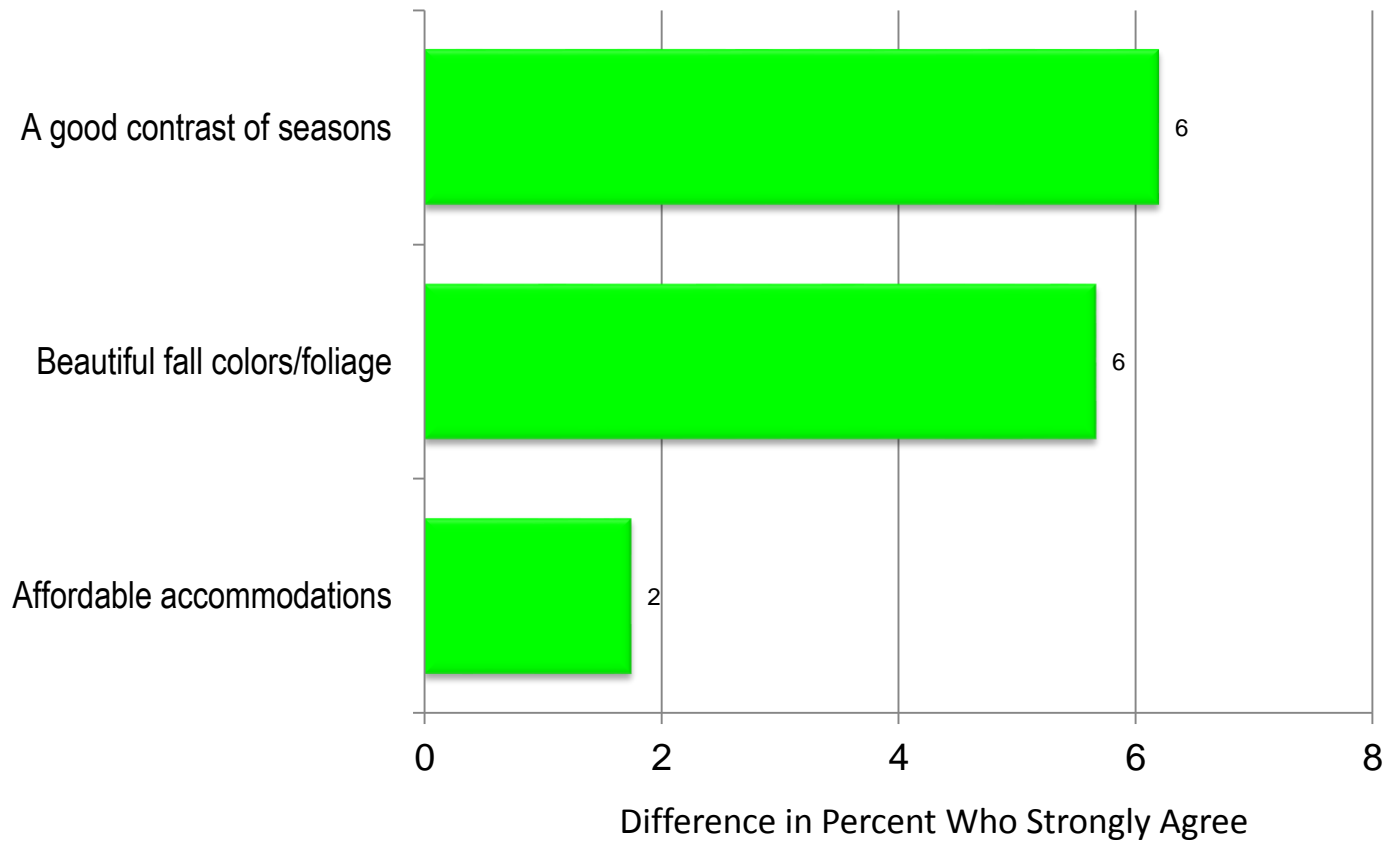
Base: Total Travelers



# Oklahoma Image Strengths vs. Texas



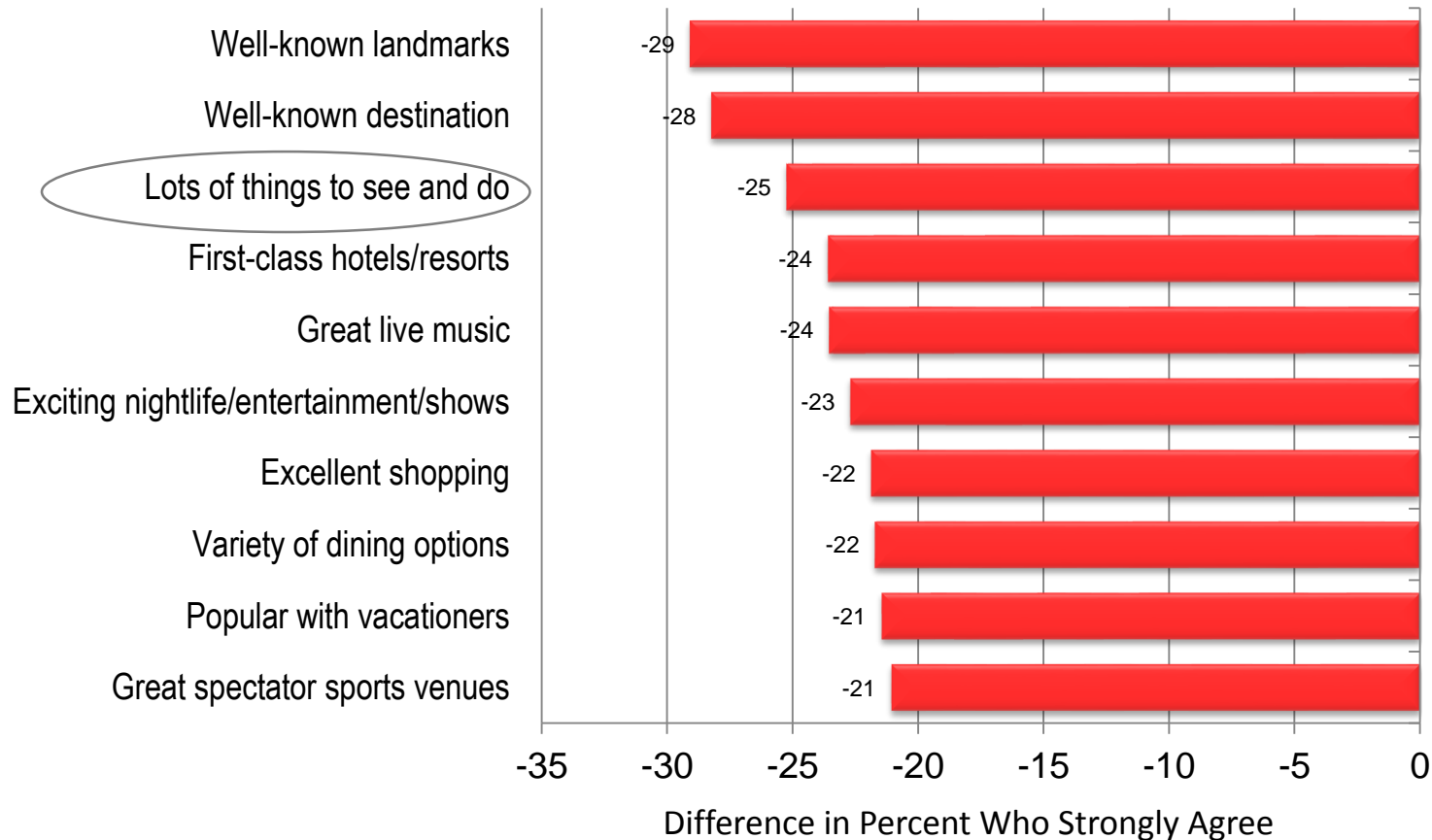
Base: Total Travelers



# Oklahoma Image Weaknesses vs. Texas



Base: Total Travelers

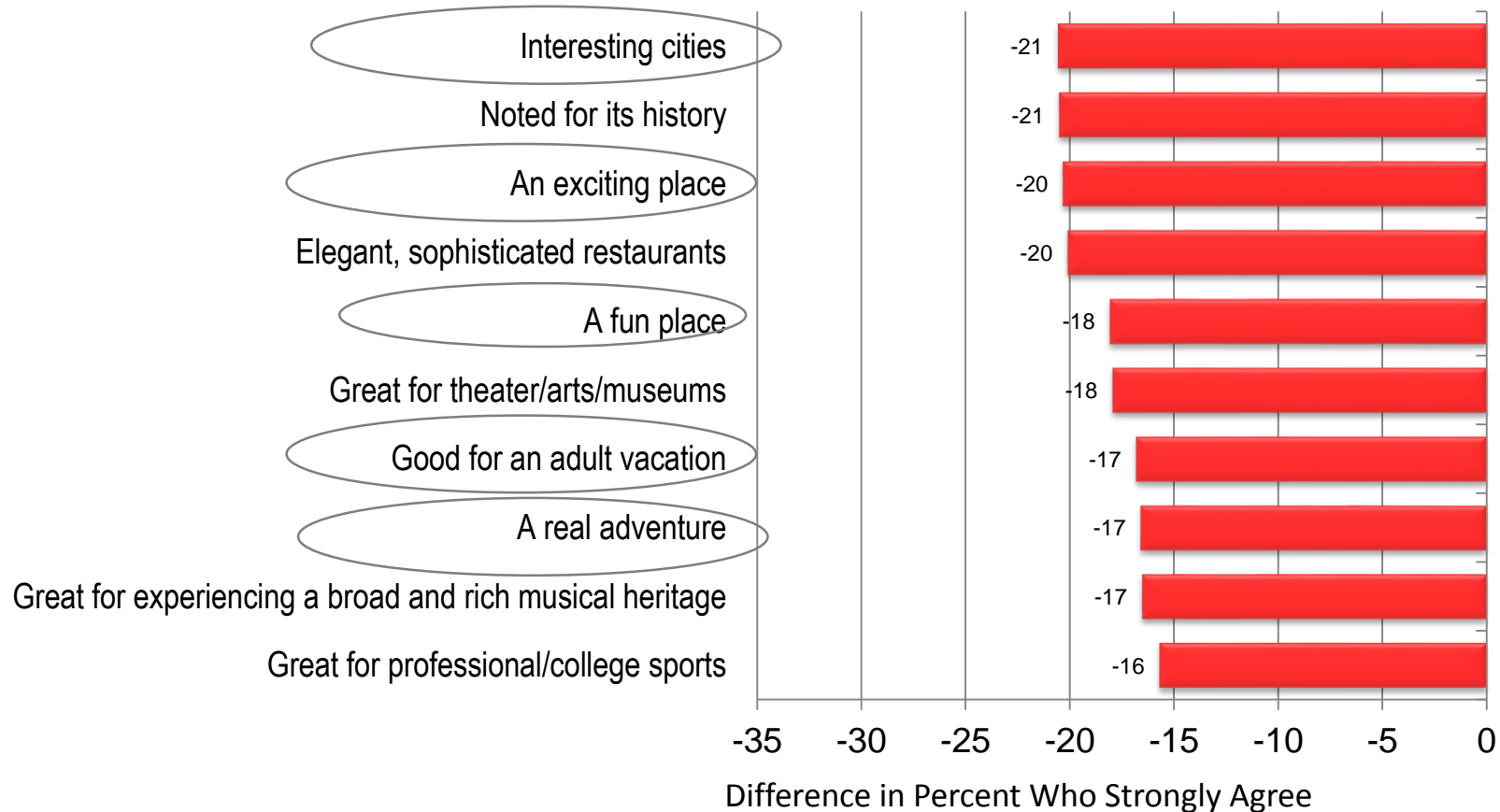


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image Weaknesses vs. Texas – Cont'd



Base: Total Travelers

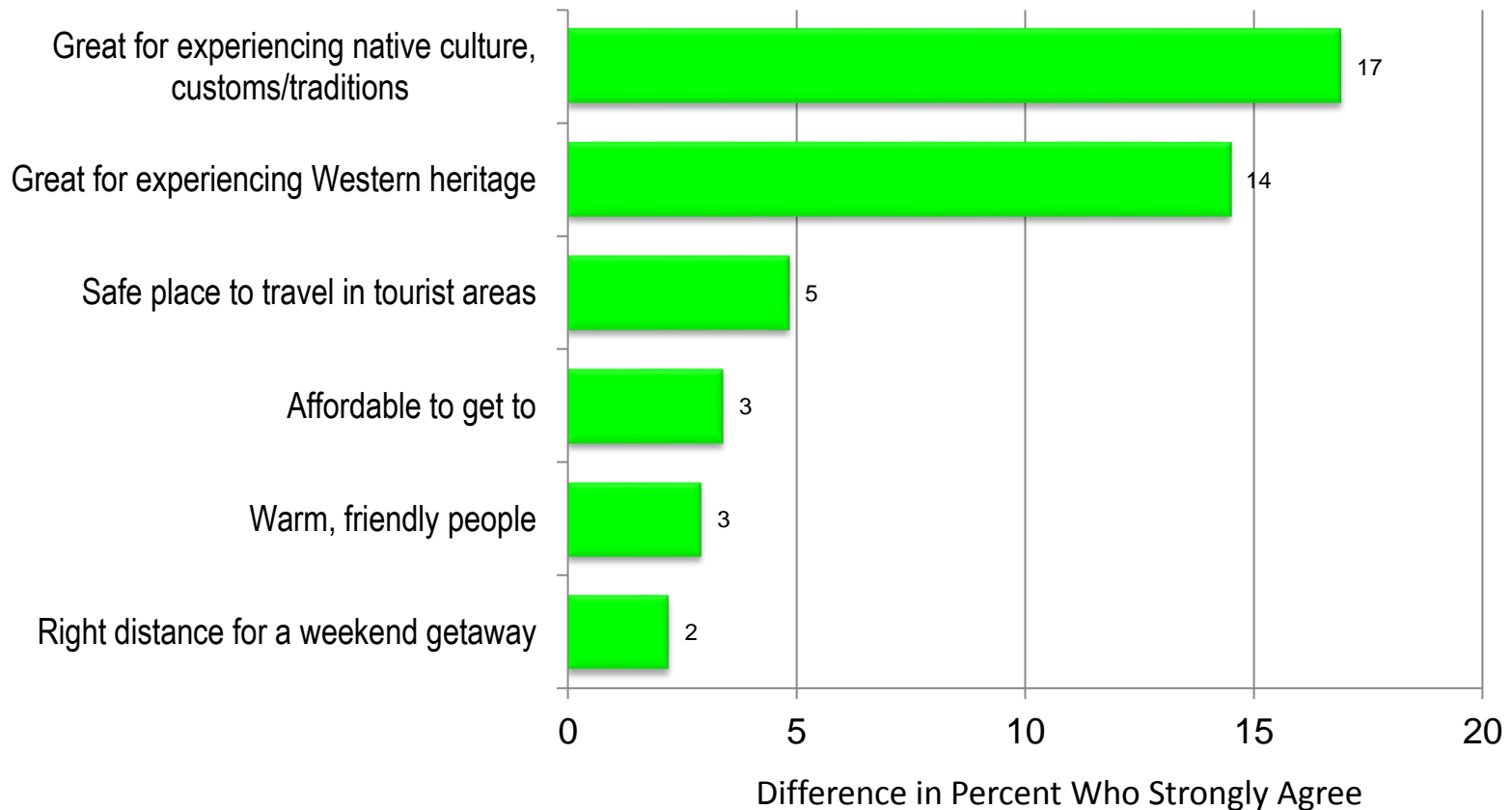


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image Strengths vs. Missouri



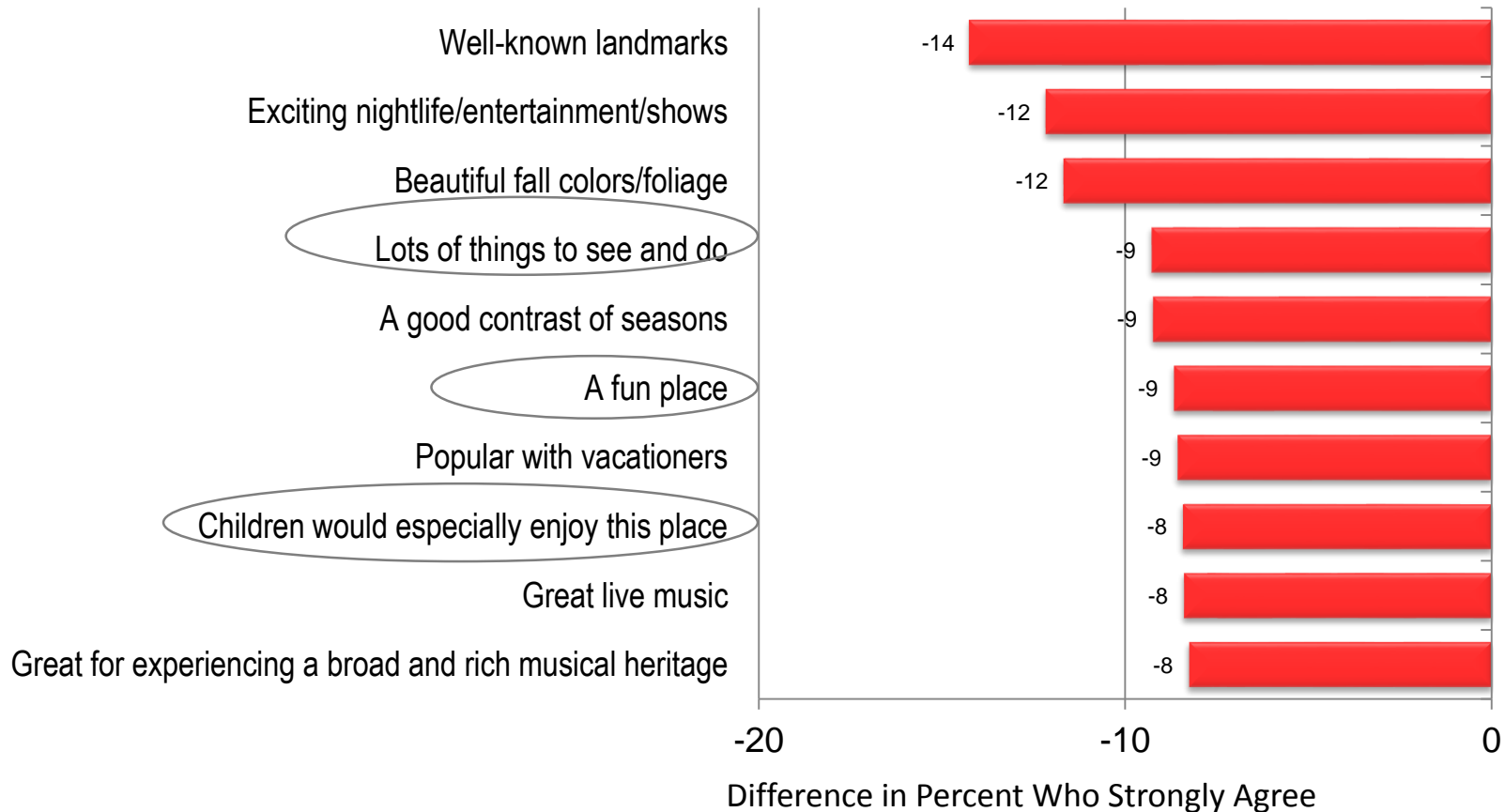
Base: Total Travelers



# Oklahoma Image Weaknesses vs. Missouri



Base: Total Travelers



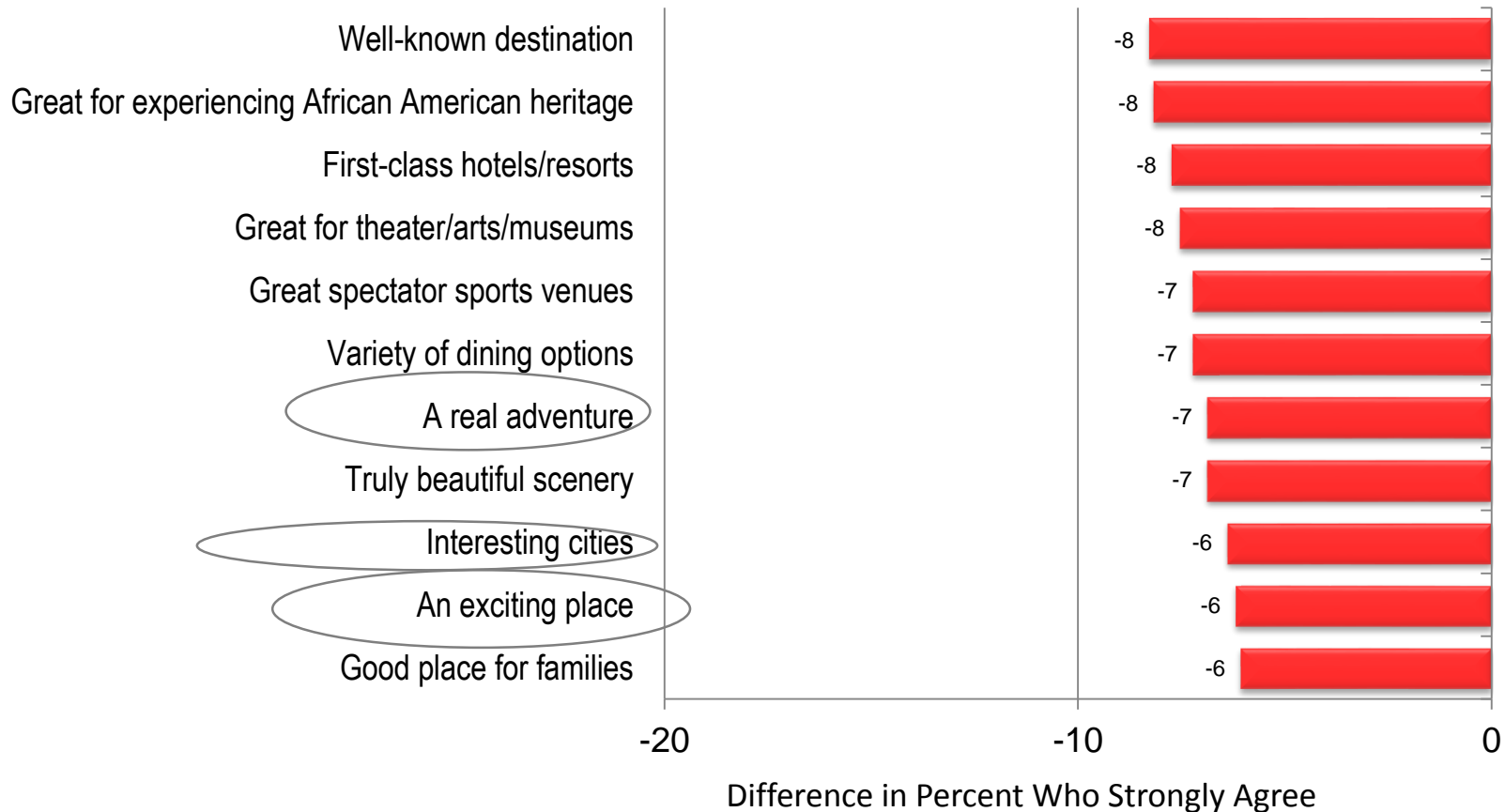
Note: Circled attributes are some of the most important image hot buttons for travelers



# Oklahoma Image Weaknesses vs. Missouri – Cont'd



Base: Total Travelers

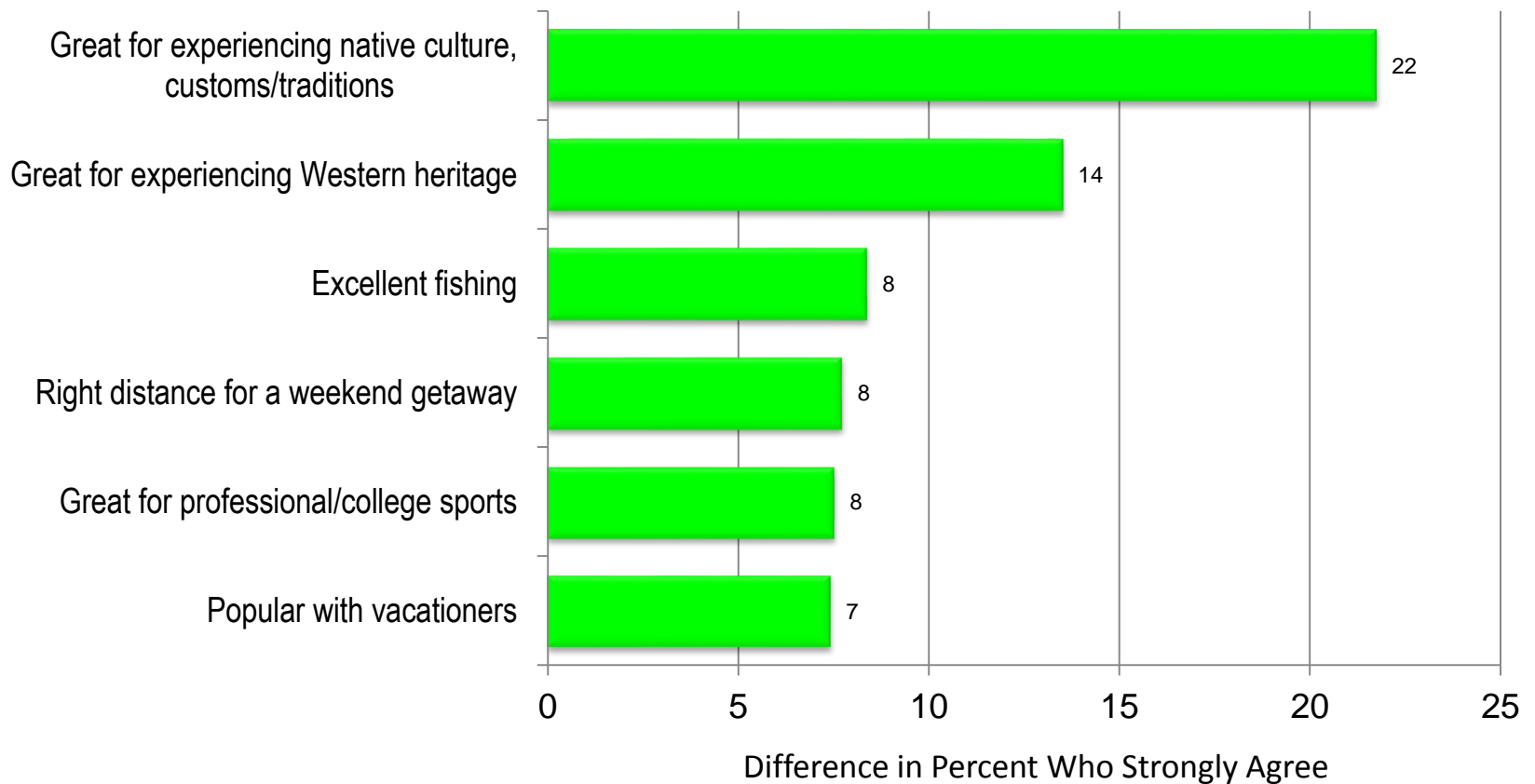


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image Strengths vs. Kansas



Base: Total Travelers

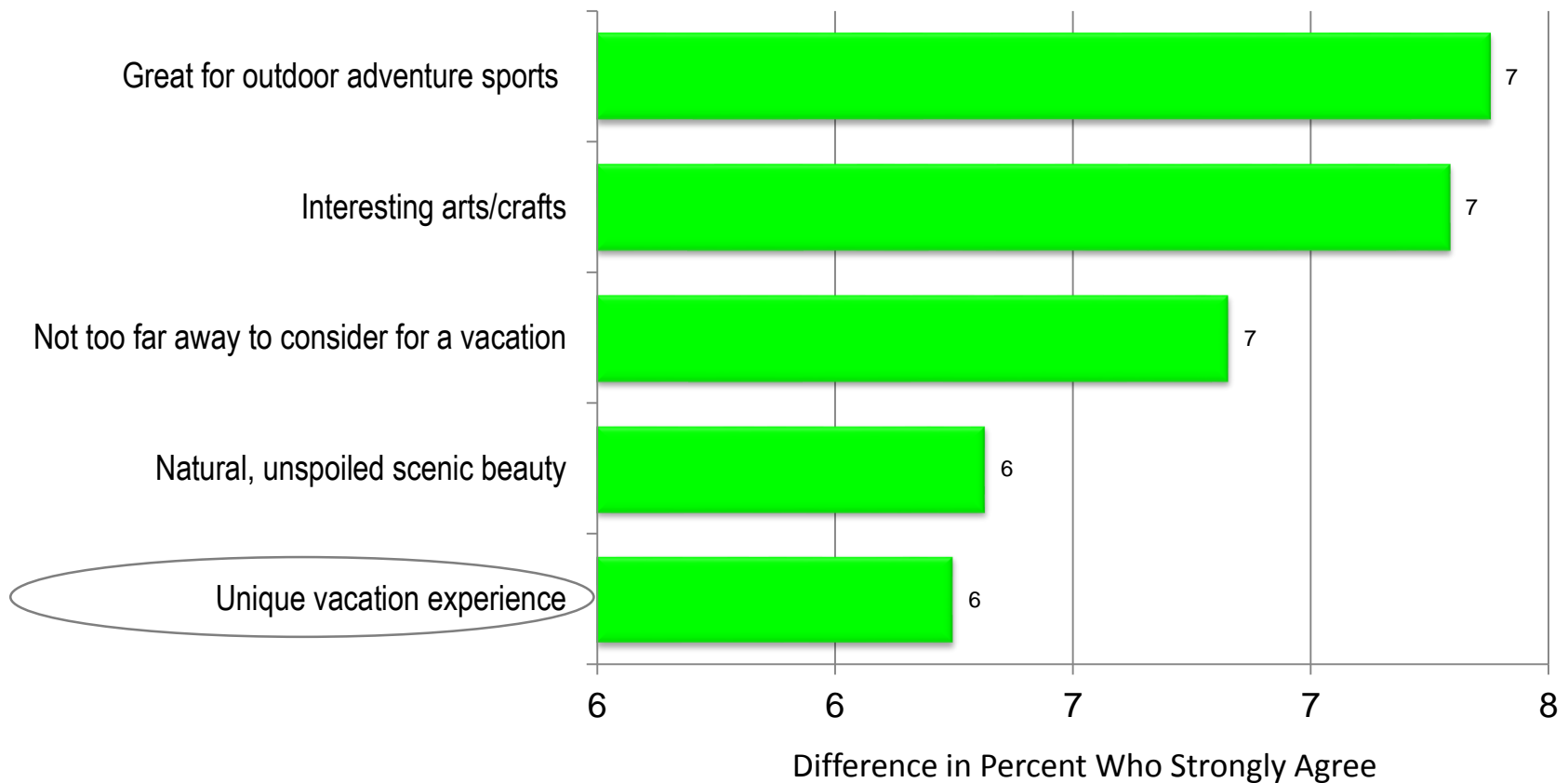


Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image Strengths vs. Kansas – Cont'd



Base: Total Travelers



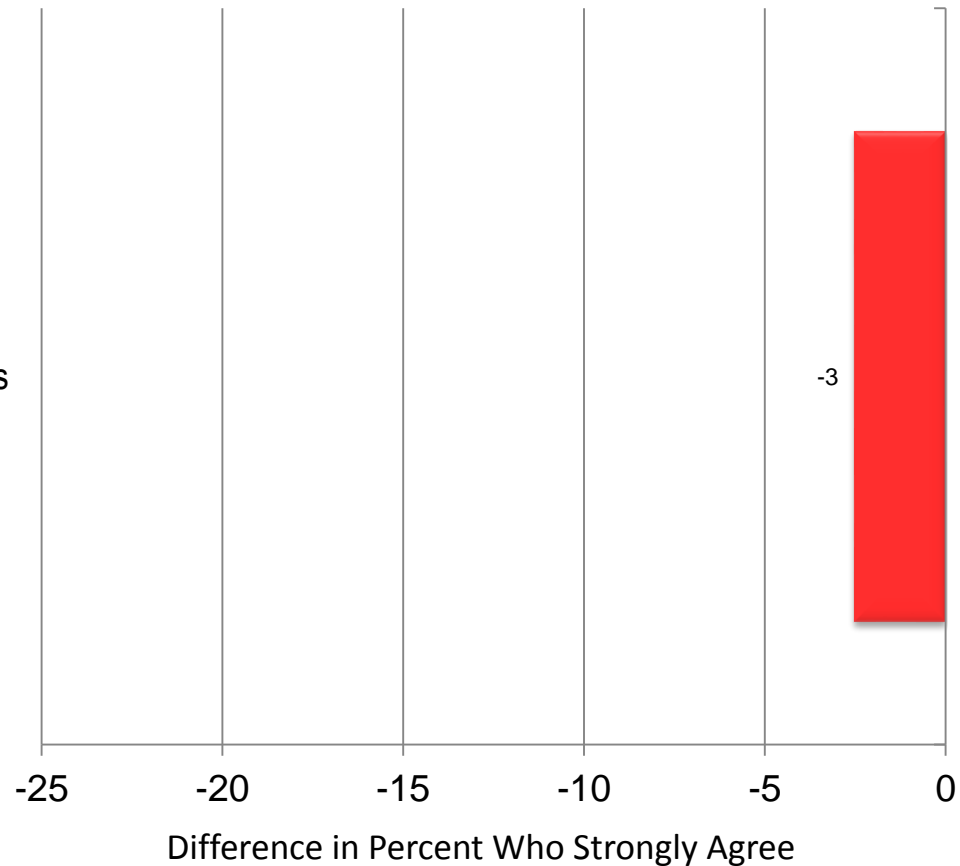
Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma Image Weaknesses vs. Kansas



Base: Total Travelers

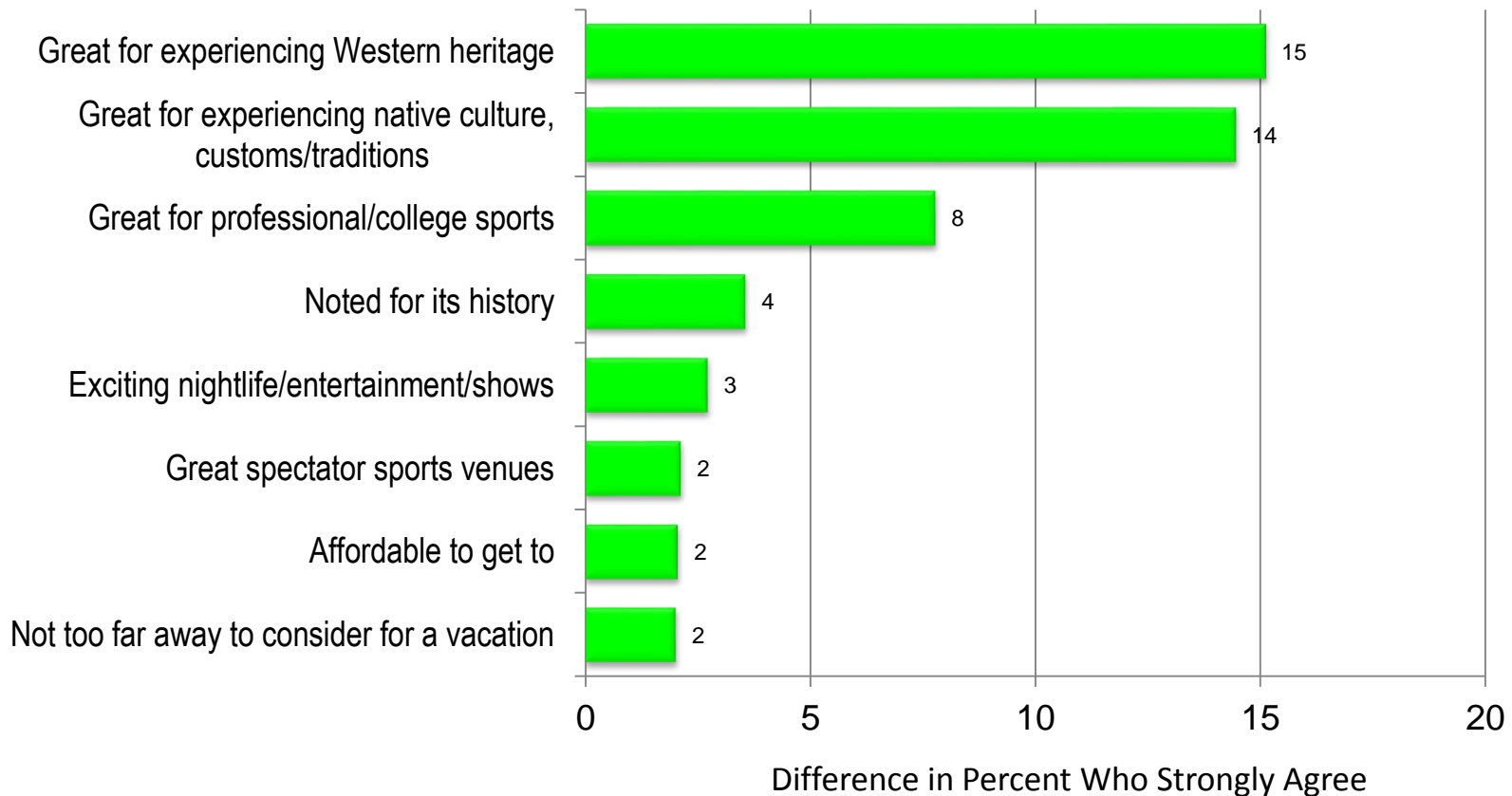
A good contrast of seasons



# Oklahoma Image Strengths vs. Arkansas



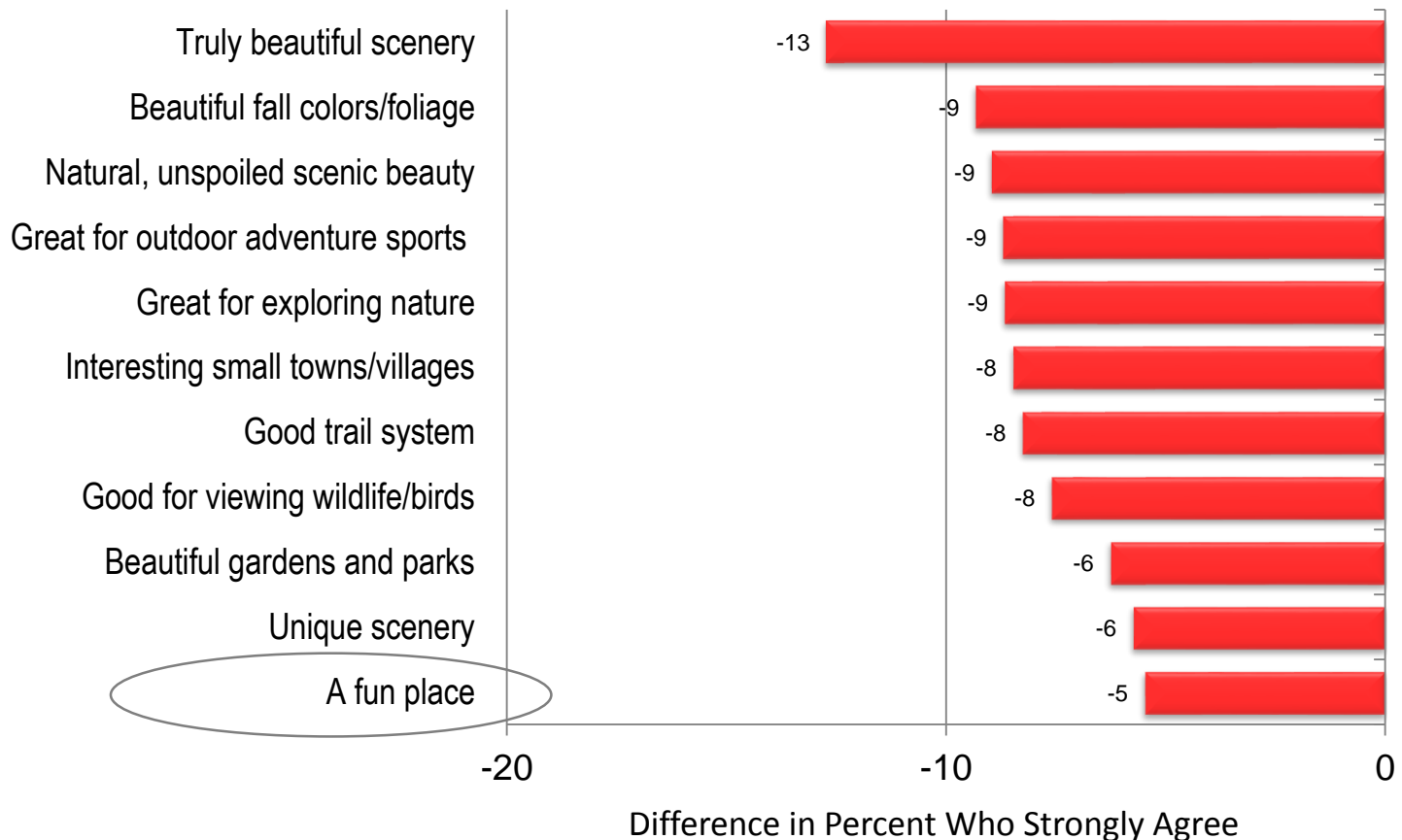
Base: Total Travelers



# Oklahoma Image Weaknesses vs. Arkansas



Base: Total Travelers



Note: Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Product Delivery

# Oklahoma's Product Delivery



- ◉ Another way to look at the image data is to compare the ratings by respondents who have not visited Oklahoma to those who have visited recently. In effect then you are looking at expectations of a Oklahoma visit (from the non-visitors) vs. product delivery (ratings of recent visitors).
- ◉ In a perfect world the ratings are equal indicating all expectations are being met. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations as it does for Oklahoma, it indicates that there is a great opportunity to educate those who do not know how wonderful Oklahoma is.

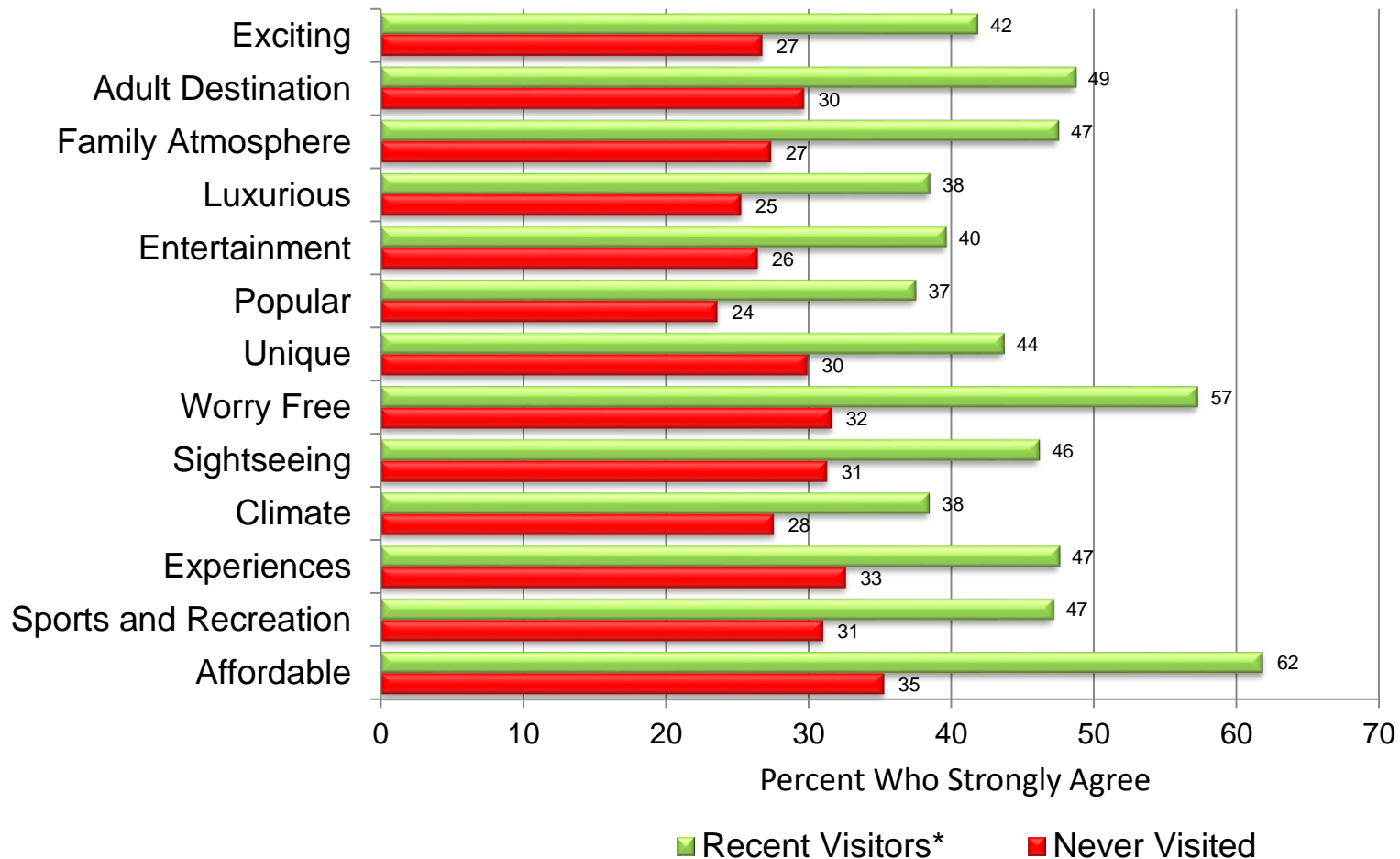


# Product Delivery Impacts



- ◉ The image ratings for Oklahoma are much higher among Oklahoma visitors on all dimensions as compared to those who have not visited.
- ◉ After visiting Oklahoma, travelers believe Oklahoma's strengths include "not too far away to consider for a vacation," "affordable to get to," "has warm and friendly people," "would feel comfortable when visiting" and "is great for experiencing native culture, customs/traditions."
- ◉ Nine of the ten Hot Buttons are positively impacted by the Oklahoma experience.

# Oklahoma's Product vs. Image



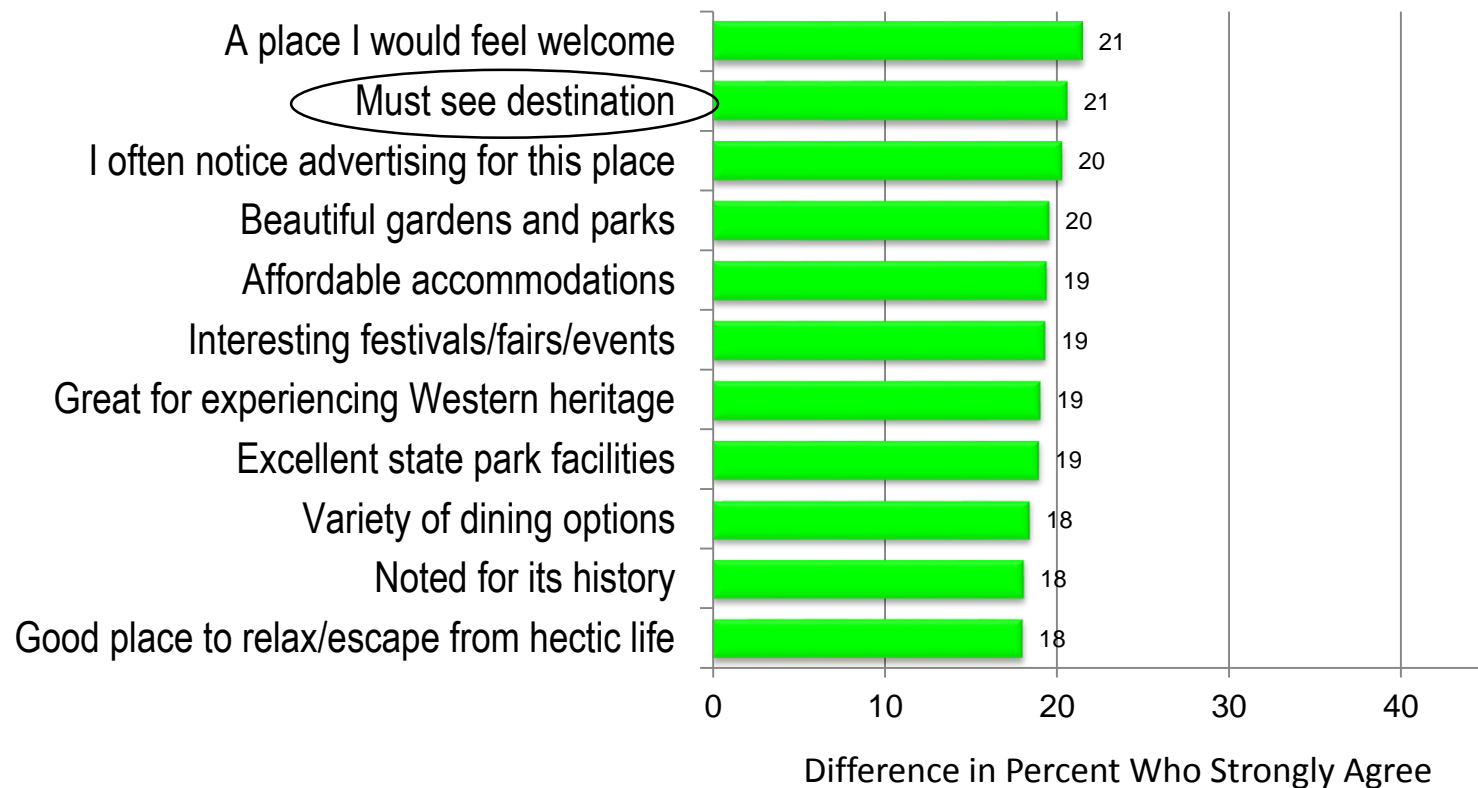
\* Visited in the past 2 years

# Top Product Strengths vs. Image



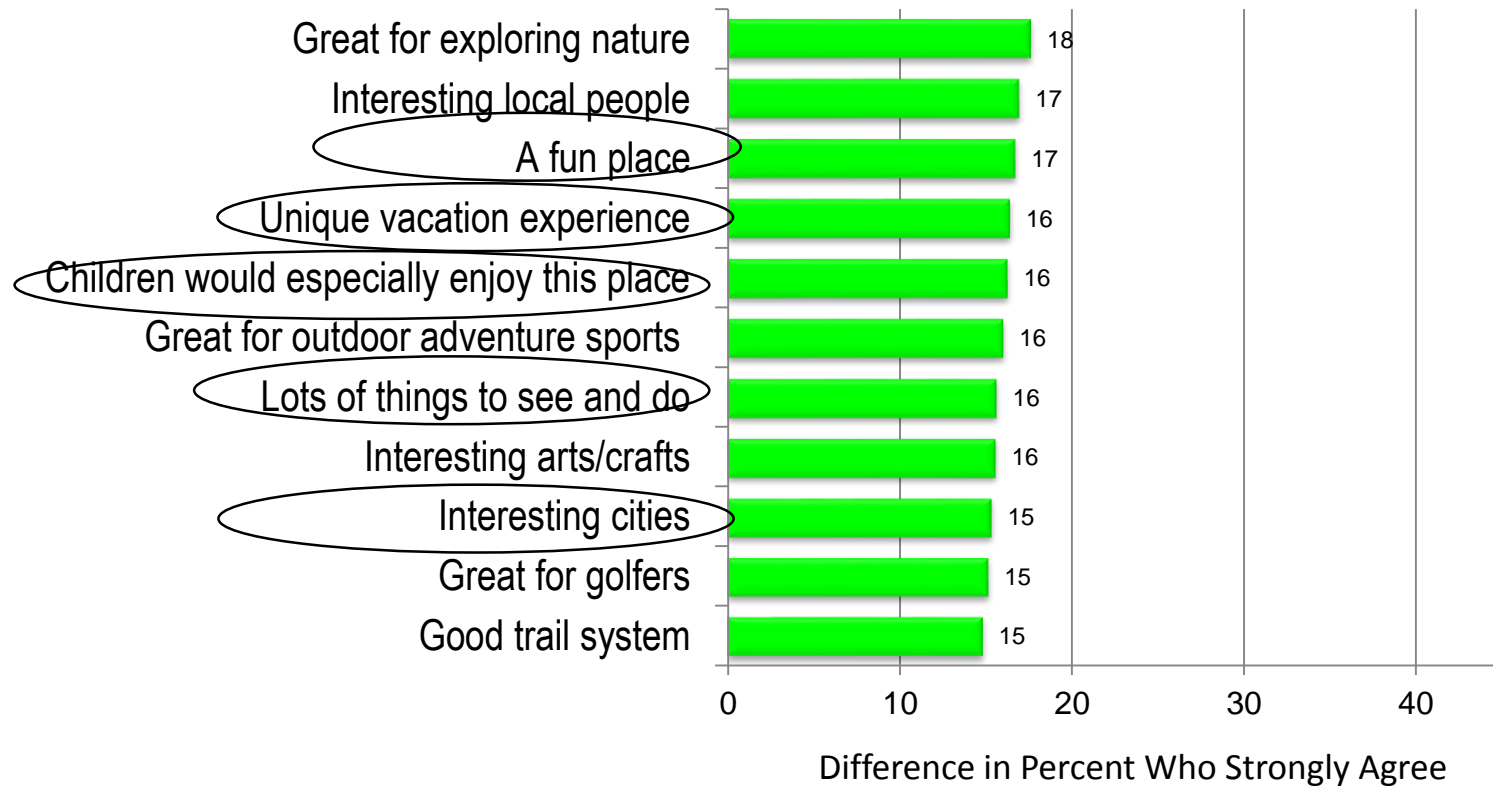
\* Circled attributes are some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image – Cont'd



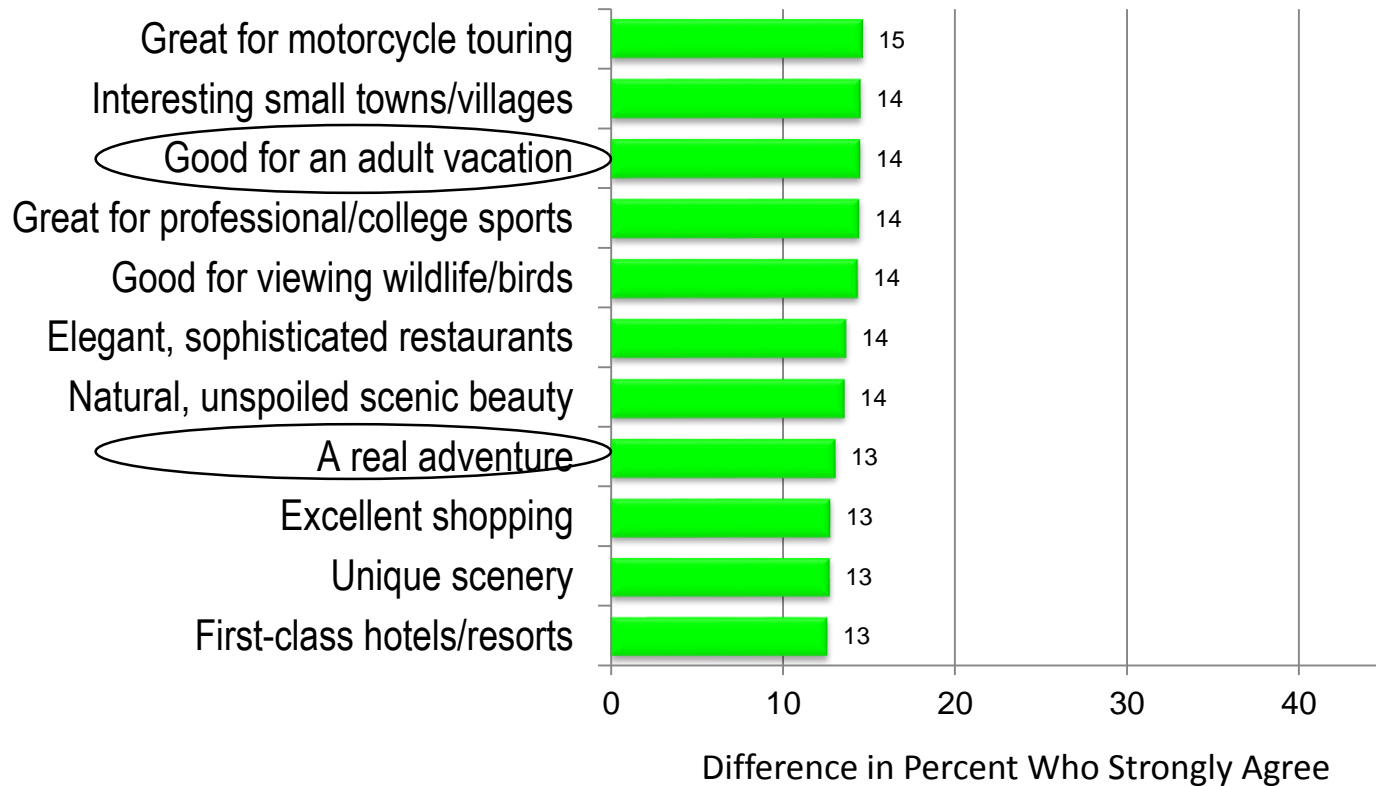
\* Circled attributes are some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image – Cont'd



\* Circled attributes are some of the most important image hot buttons for travelers

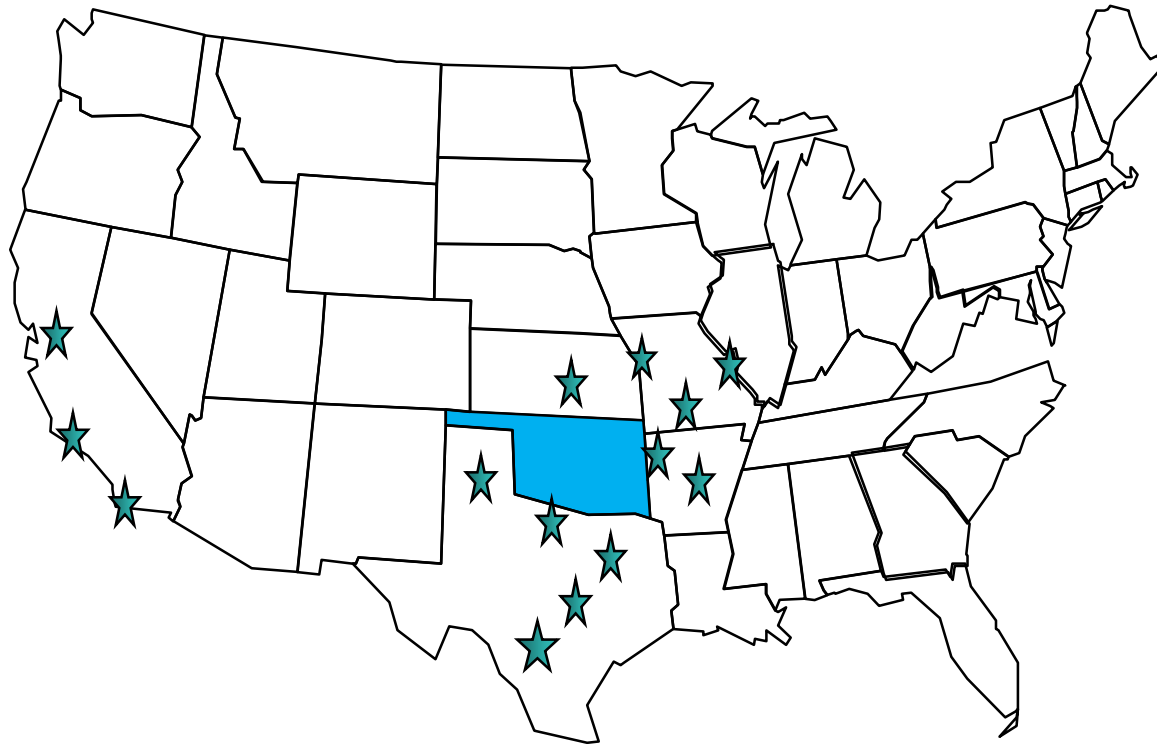
# Top Product Strengths vs. Image – Cont'd



\* Circled attributes are some of the most important image hot buttons for travelers

# **Oklahoma's 2015 Advertising Campaign**

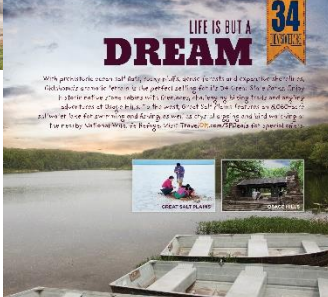
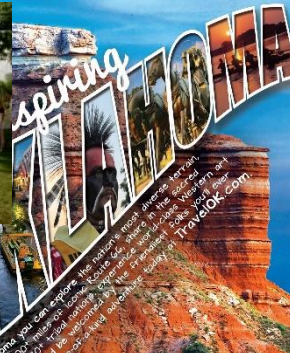
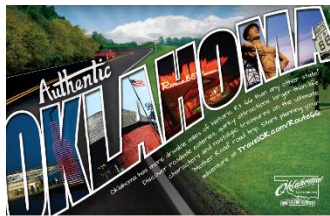
# Oklahoma's Advertising Markets





Creative

# Sample of Ads Run



# Advertising Awareness

# Advertising Impacts

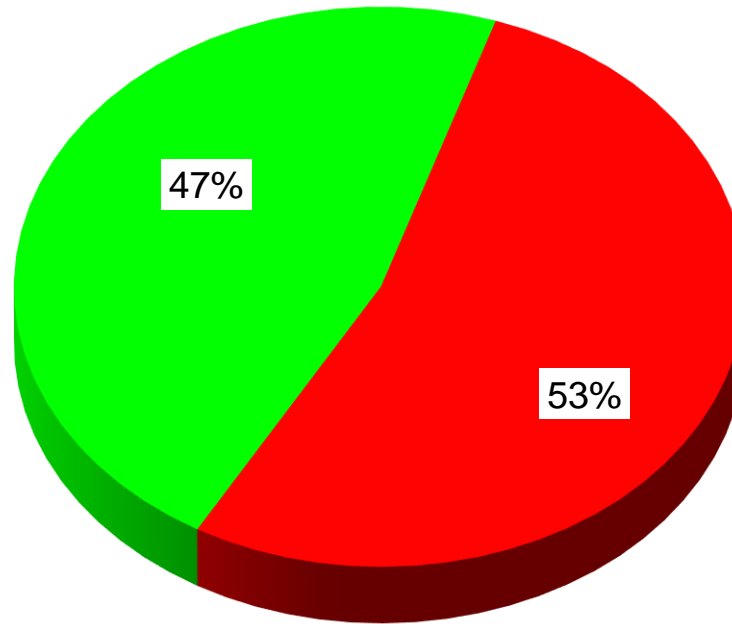


- ◉ The advertising awareness levels were strong, 47% of all the respondents recalled seeing at least one of Oklahoma's travel ads.
  - ◉ *The awareness was strongest in Oklahoma and the Ft. Smith DMA. It was weakest in St. Louis, Kansas City and San Diego DMAs.*
  - ◉ *The awareness is similar across all media forms – television, print, and web or digital, each at 33%-35%. Respondents who saw all three forms was 22%*

# Awareness of 2015 Oklahoma Advertising



Base: Total Travelers

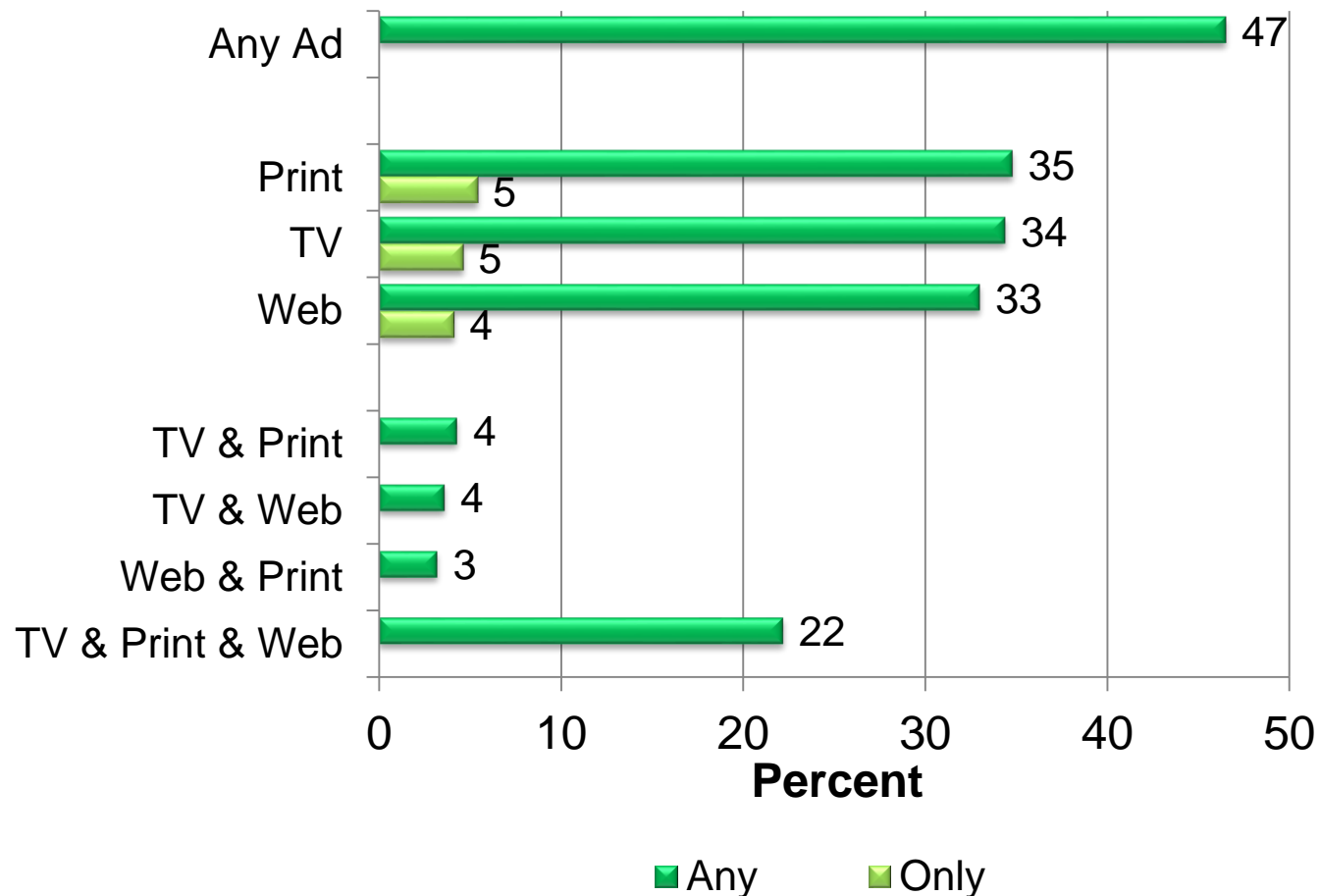


■ Aware ■ Unaware

# Awareness by Type of Media



Base: Total Travelers



# Impact of the 2015 Advertising Campaign on Oklahoma's Image

# Advertising Image Impacts



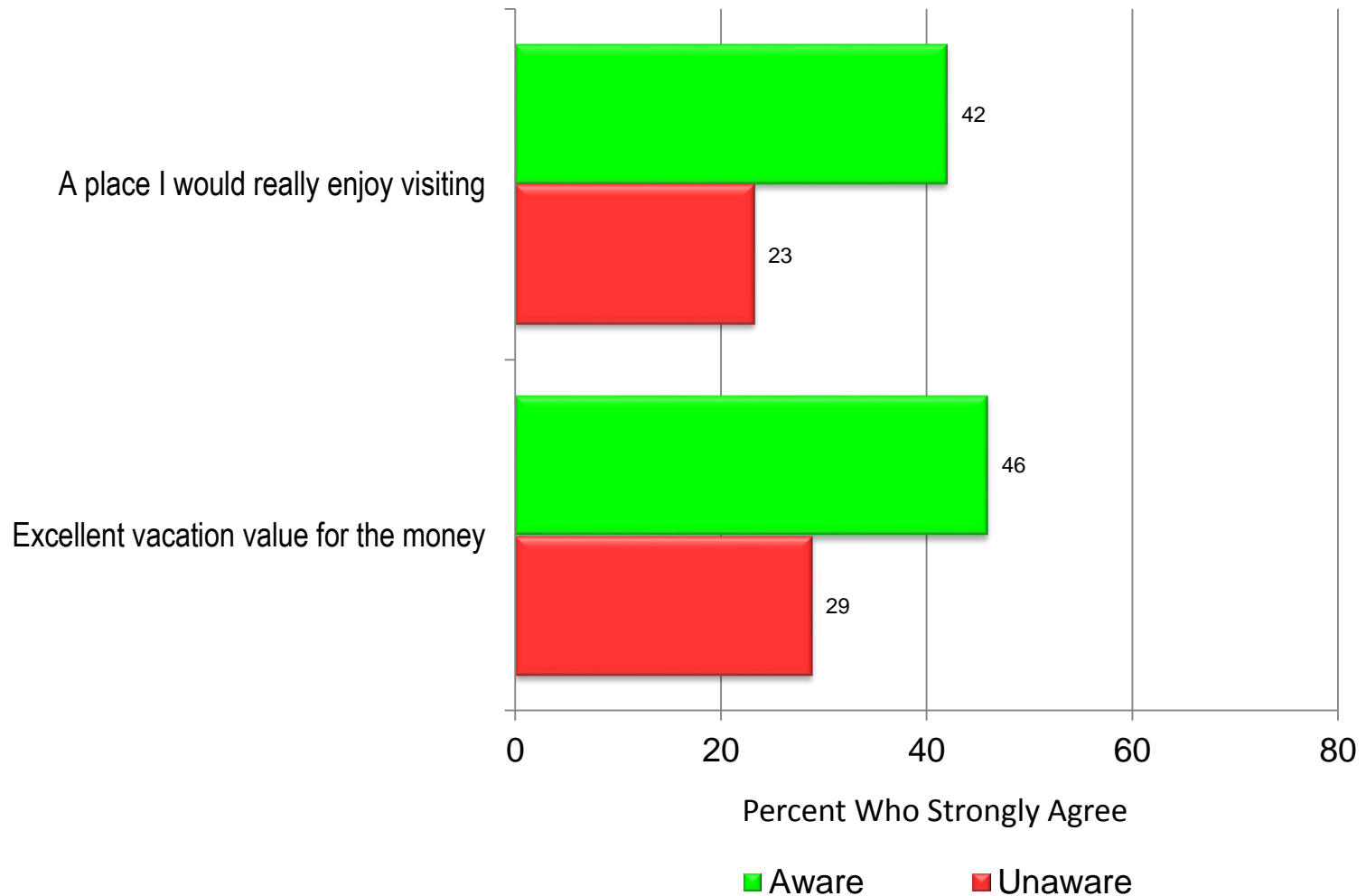
- ⊙ All the image factors were positively impacted by the campaign, the lowest lift being 13% and the highest lift being 19%. These are very high lifts.
- ⊙ The Hot Buttons notably improved by the advertising are:
  - ⊙ *An exciting place*
  - ⊙ *Interesting cities*
  - ⊙ *Children would especially enjoy*
  - ⊙ *A fun place*
  - ⊙ *Good for an adult vacation*
- ⊙ Specifically when travelers are aware of the advertising, Oklahoma is seen as being strong as “being an exciting place, “being the right distance for a weekend getaway,” with having a “good trail system,” and “great for outdoor adventure sports.”



# Impact of 2015 Advertising on Oklahoma's Summary Measures



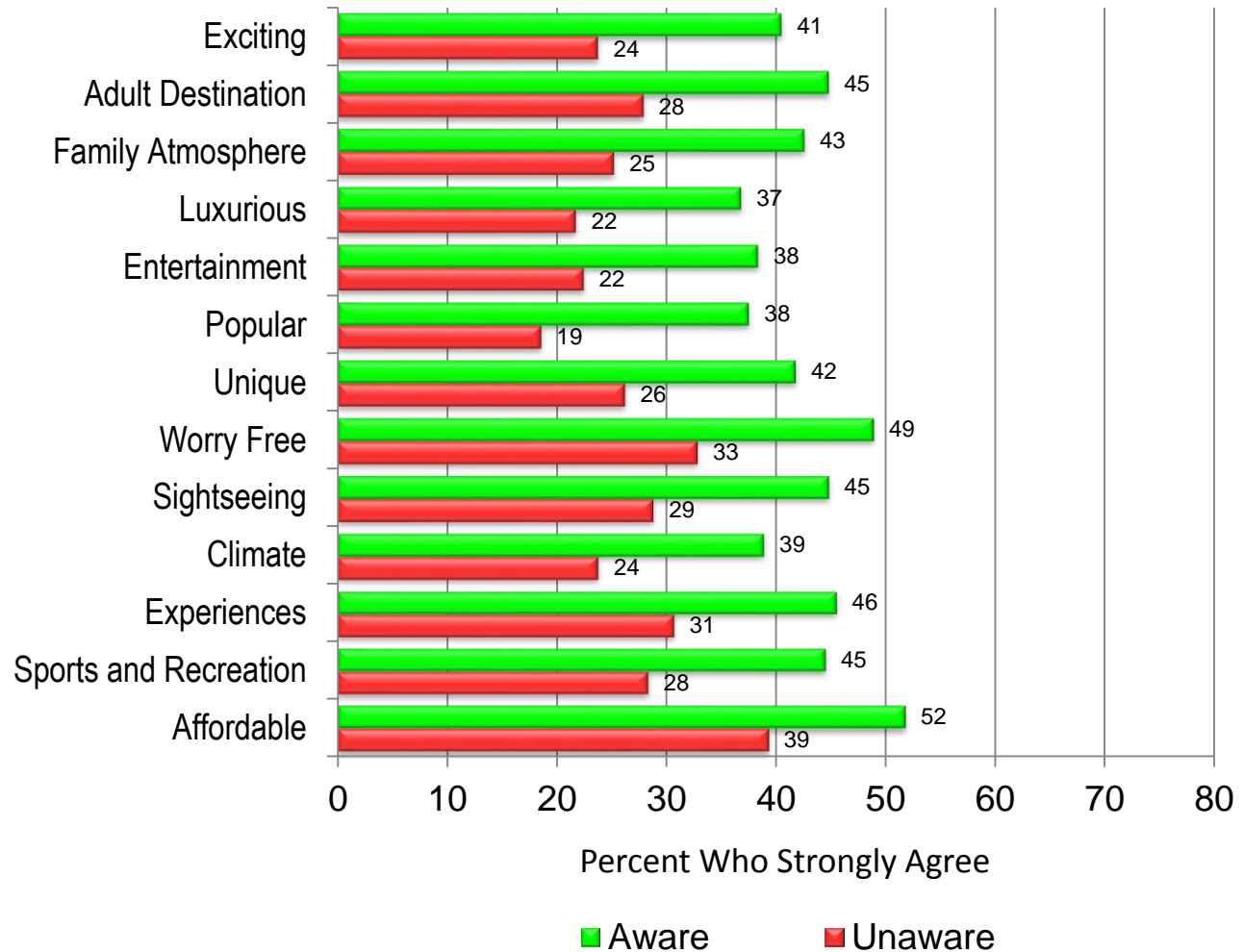
Base: Total Travelers



# Impact of 2015 Advertising on Oklahoma's Image



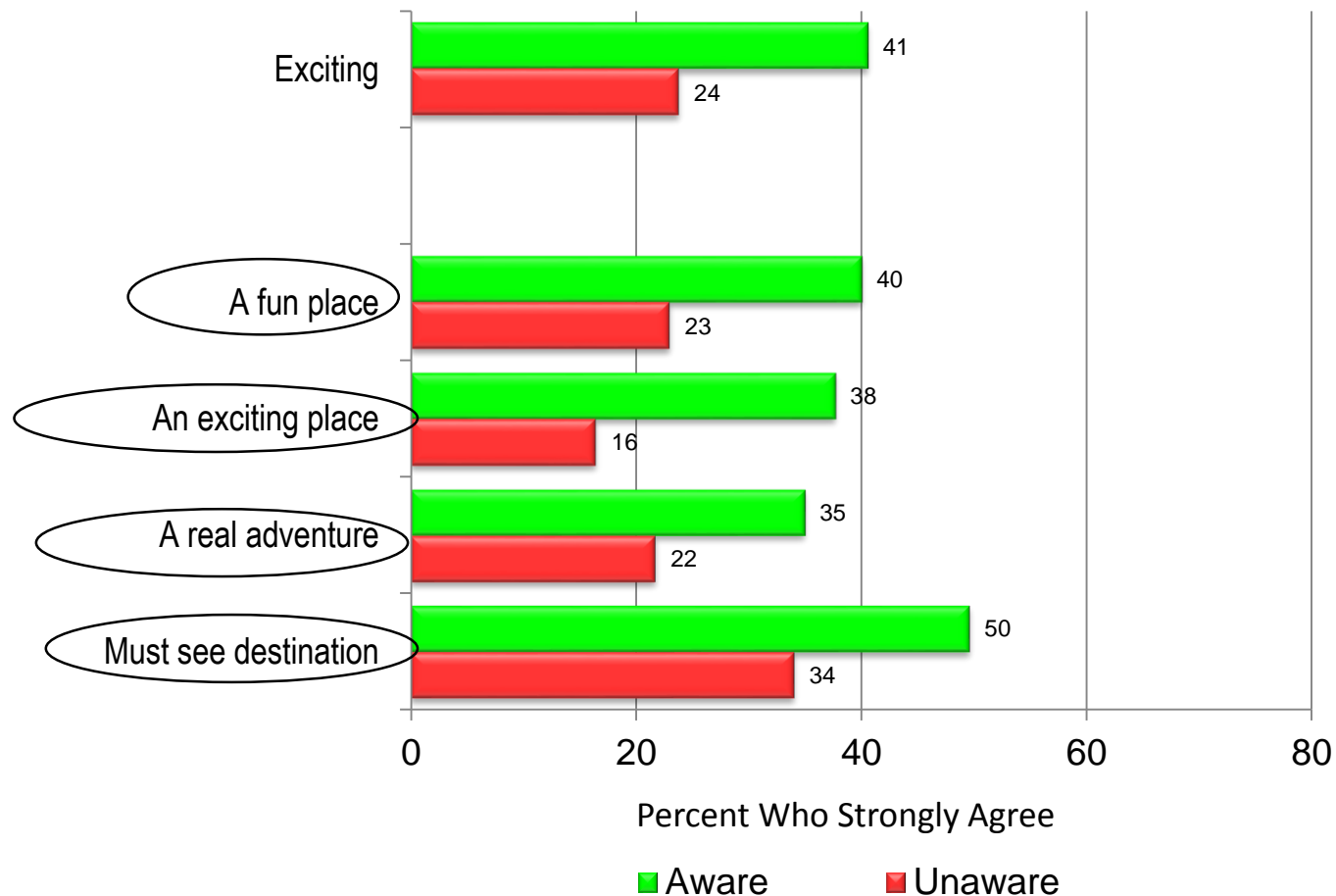
Base: Total Travelers



# Oklahoma's Image — Exciting



Base: Total Travelers

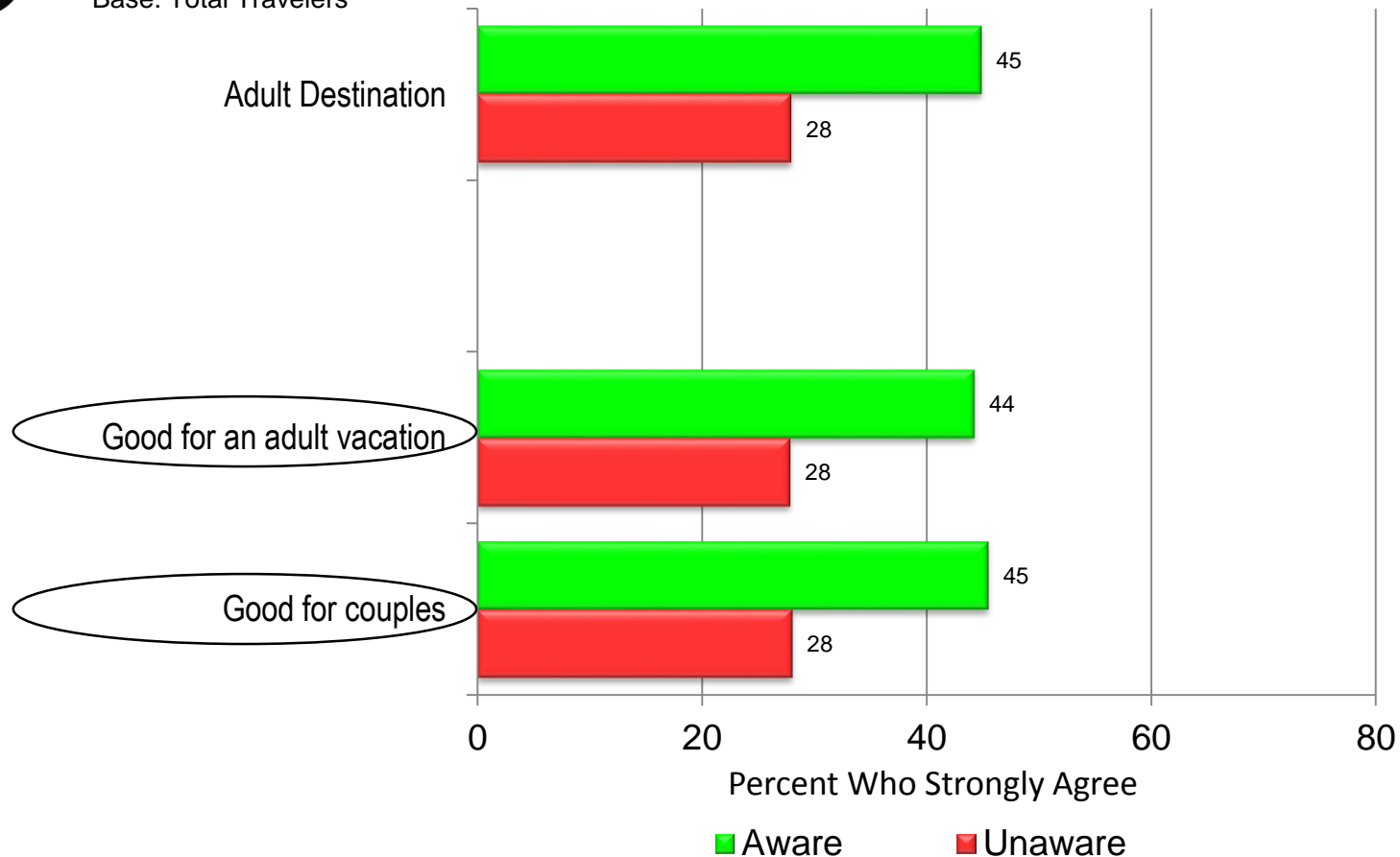


\* Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image — Adult Destination



Base: Total Travelers

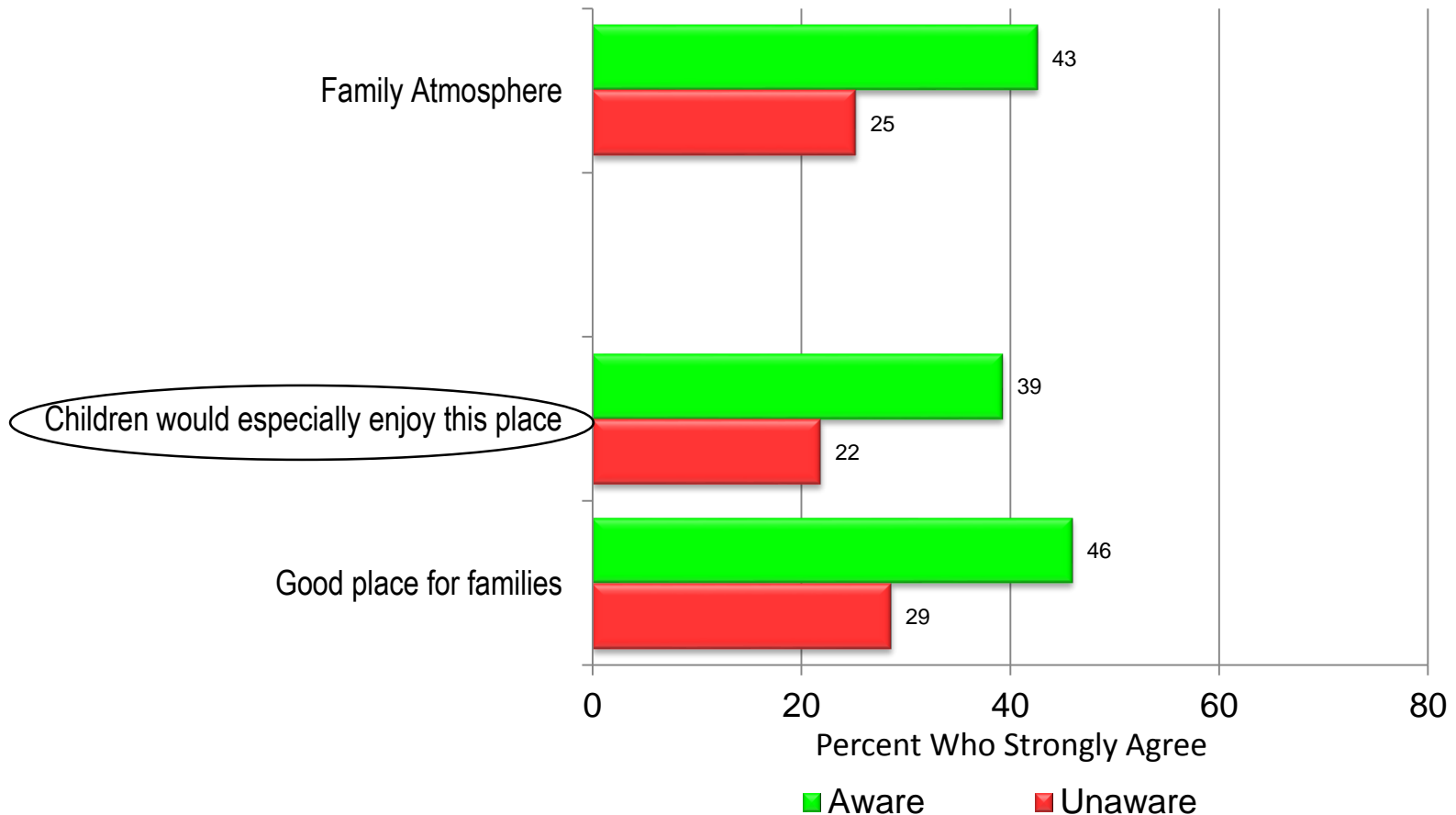


\* Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image — Family Atmosphere



Base: Total Travelers

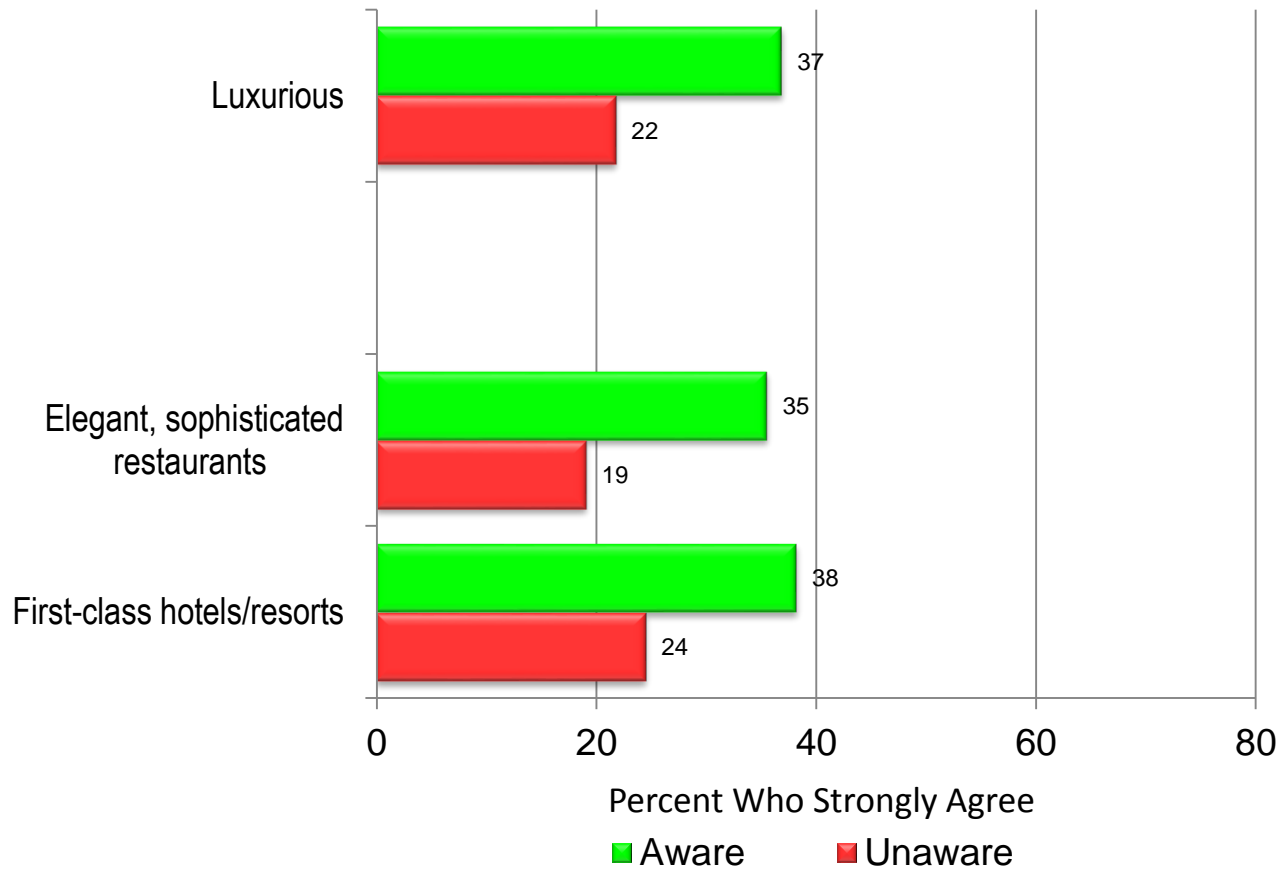


\* Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image — Luxurious



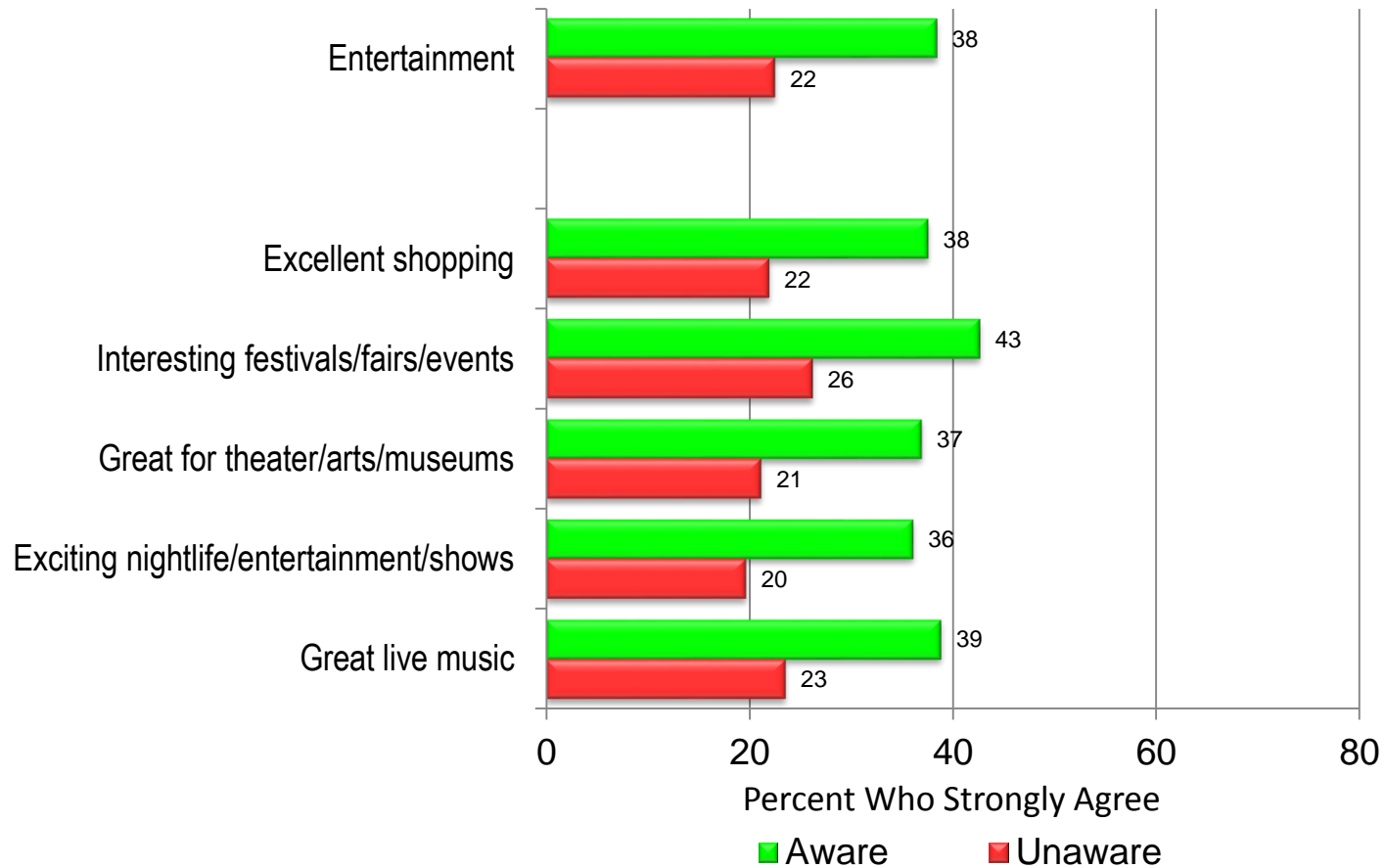
Base: Total Travelers



# Oklahoma's Image — Entertainment



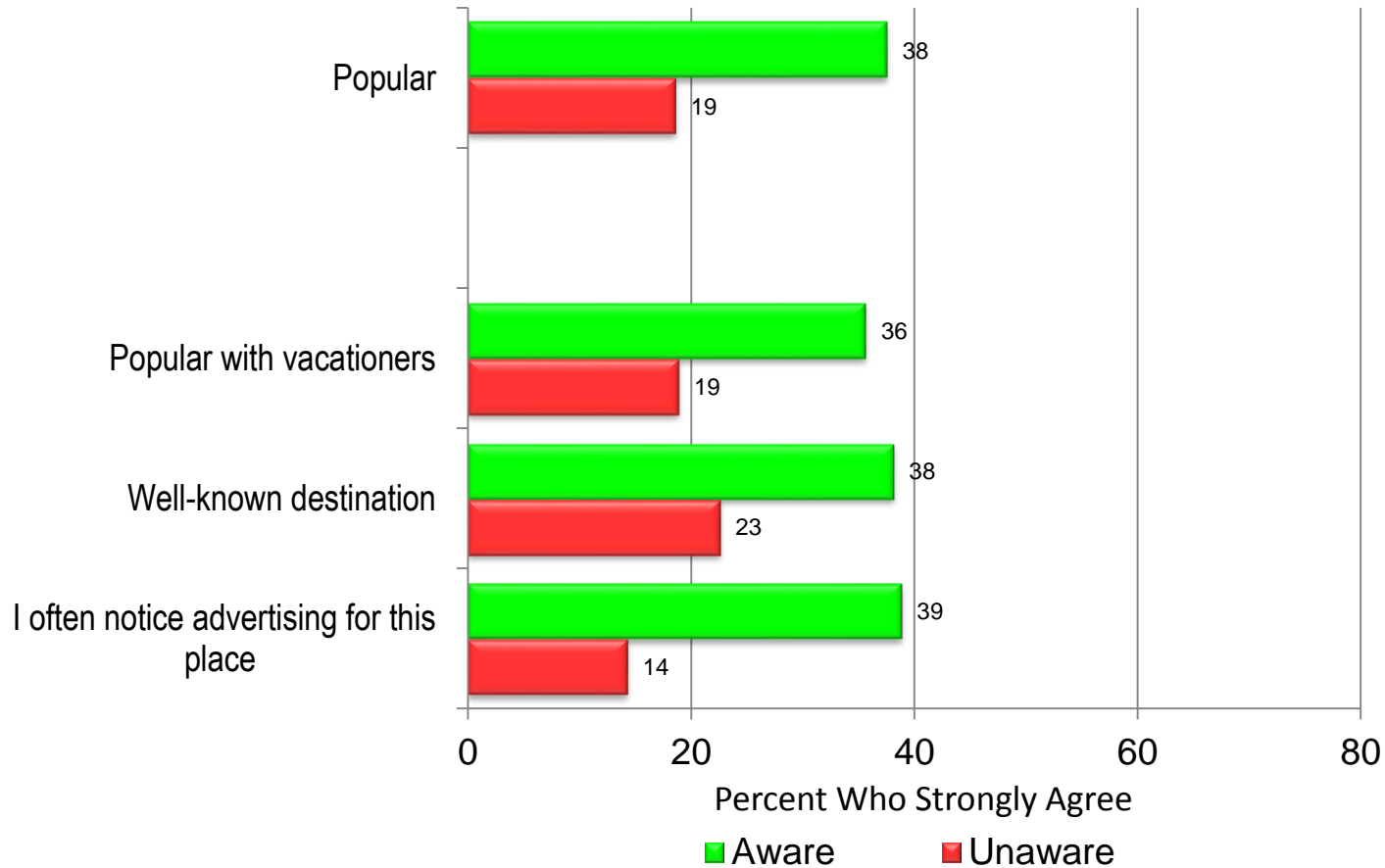
Base: Total Travelers



# Oklahoma's Image — Popular



Base: Total Travelers

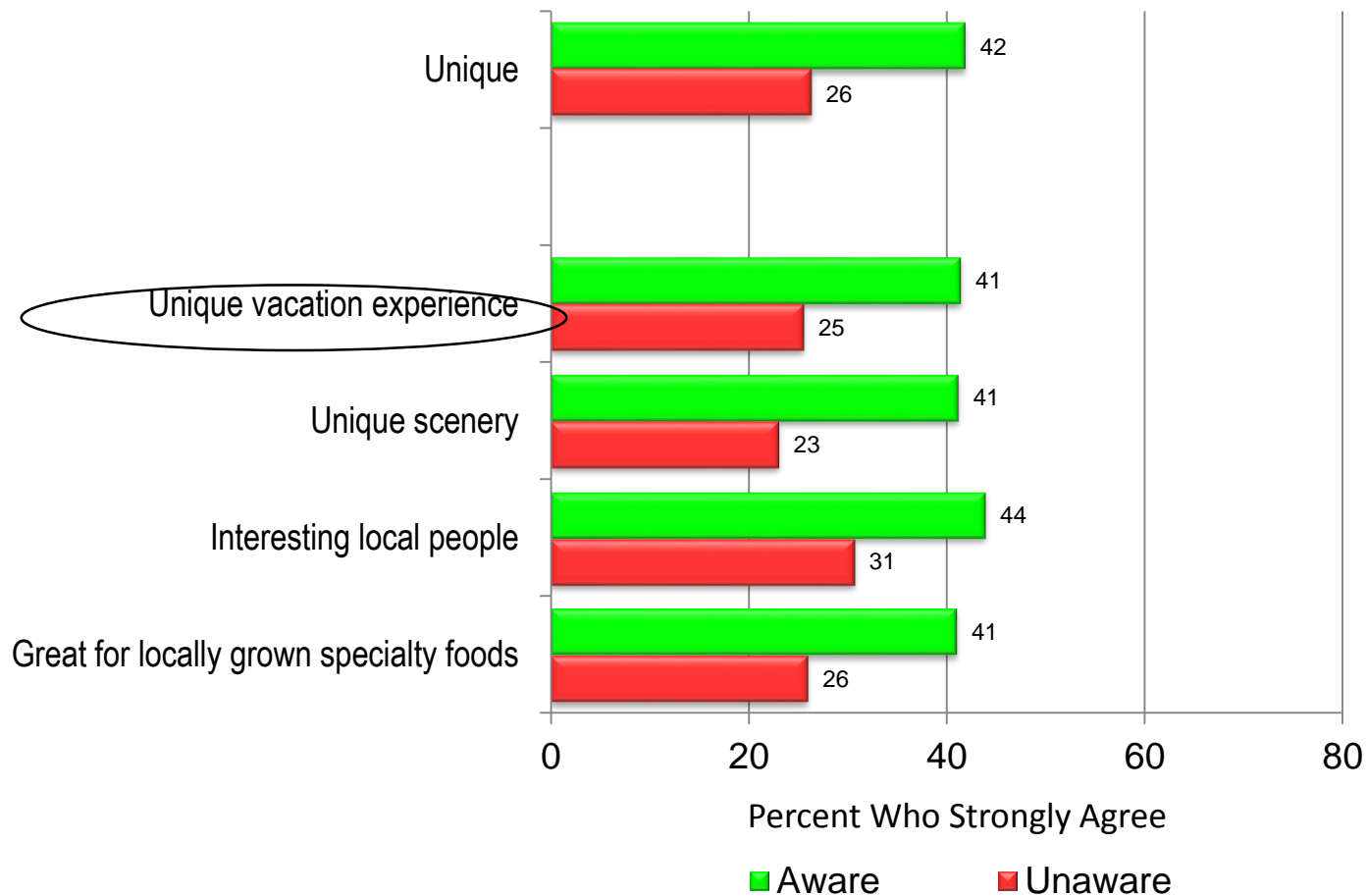




# Oklahoma's Image — Unique



Base: Total Travelers

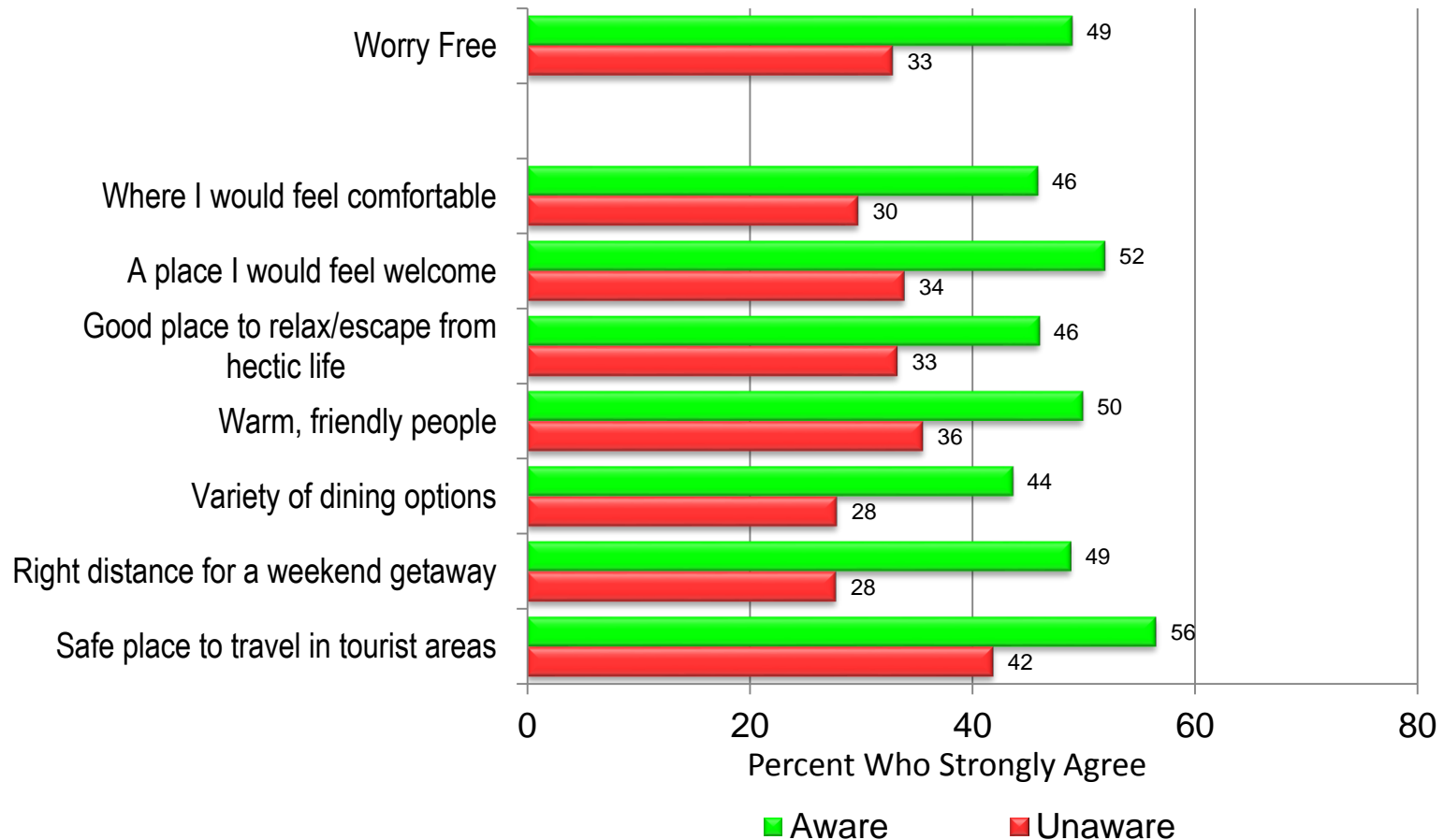


\* Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image — Worry Free



Base: Total Travelers

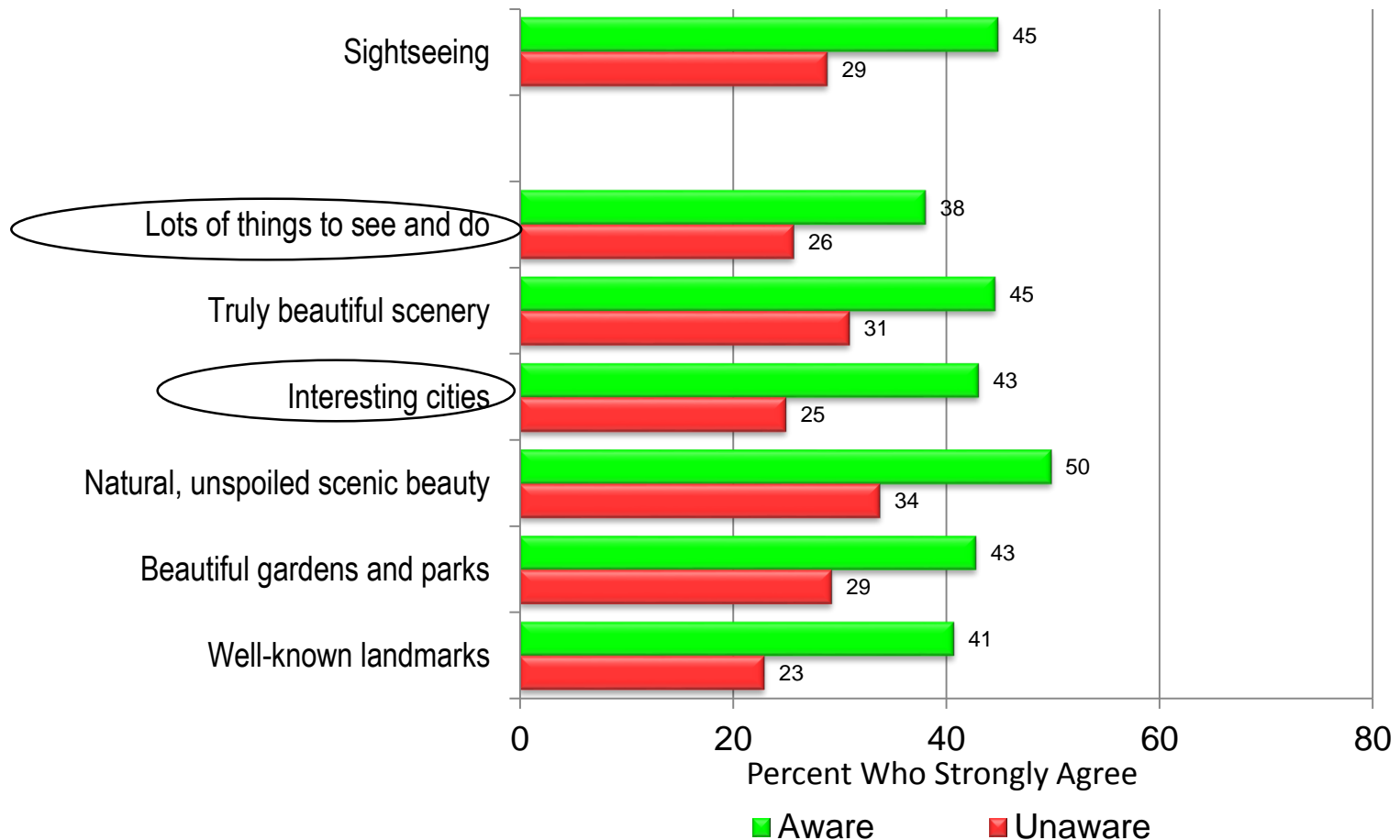


\* Circled attributes are some of the most important image hot buttons for travelers

# Oklahoma's Image — Sightseeing



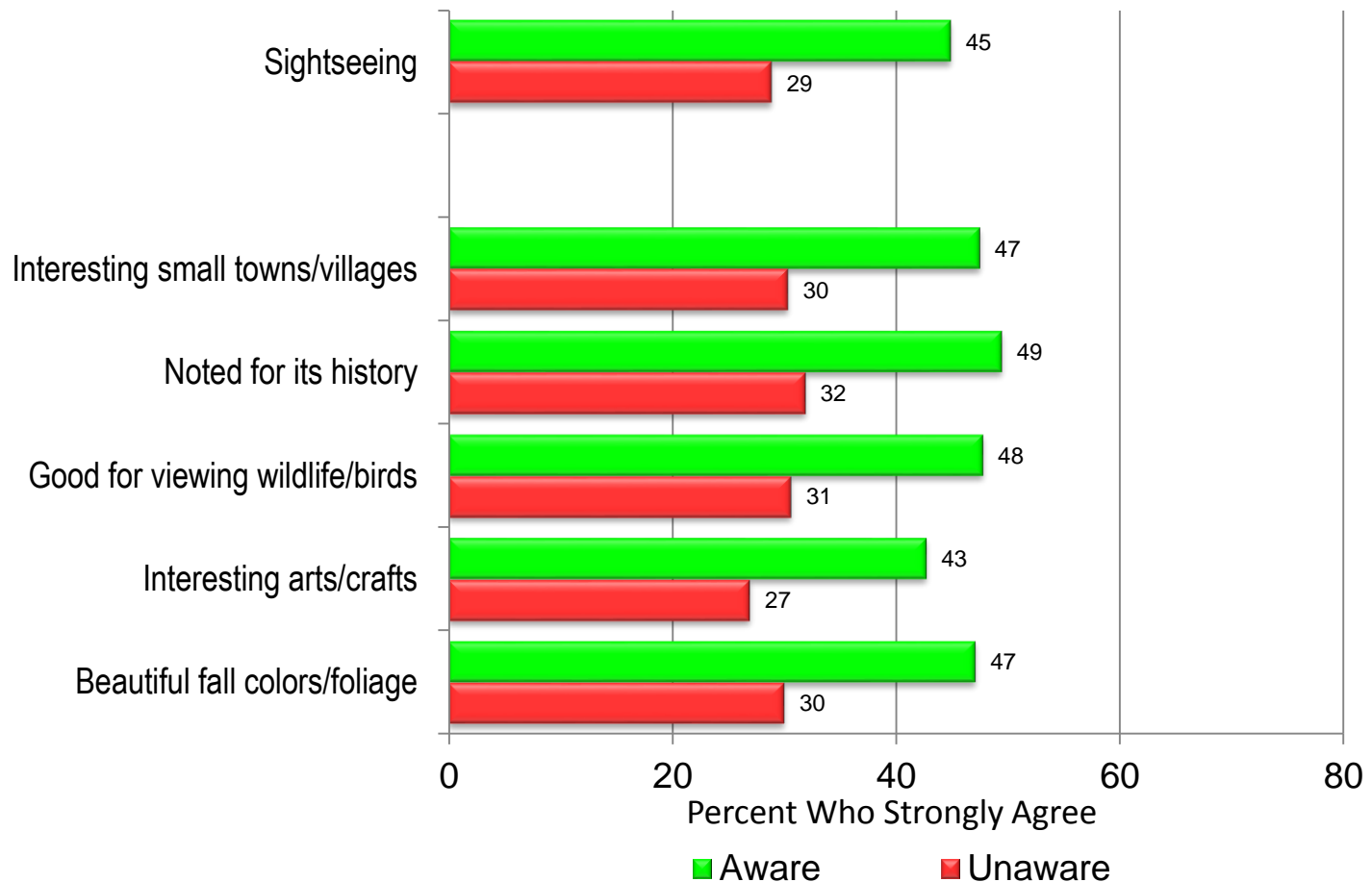
Base: Total Travelers



# Oklahoma's Image — Sightseeing — Cont'd



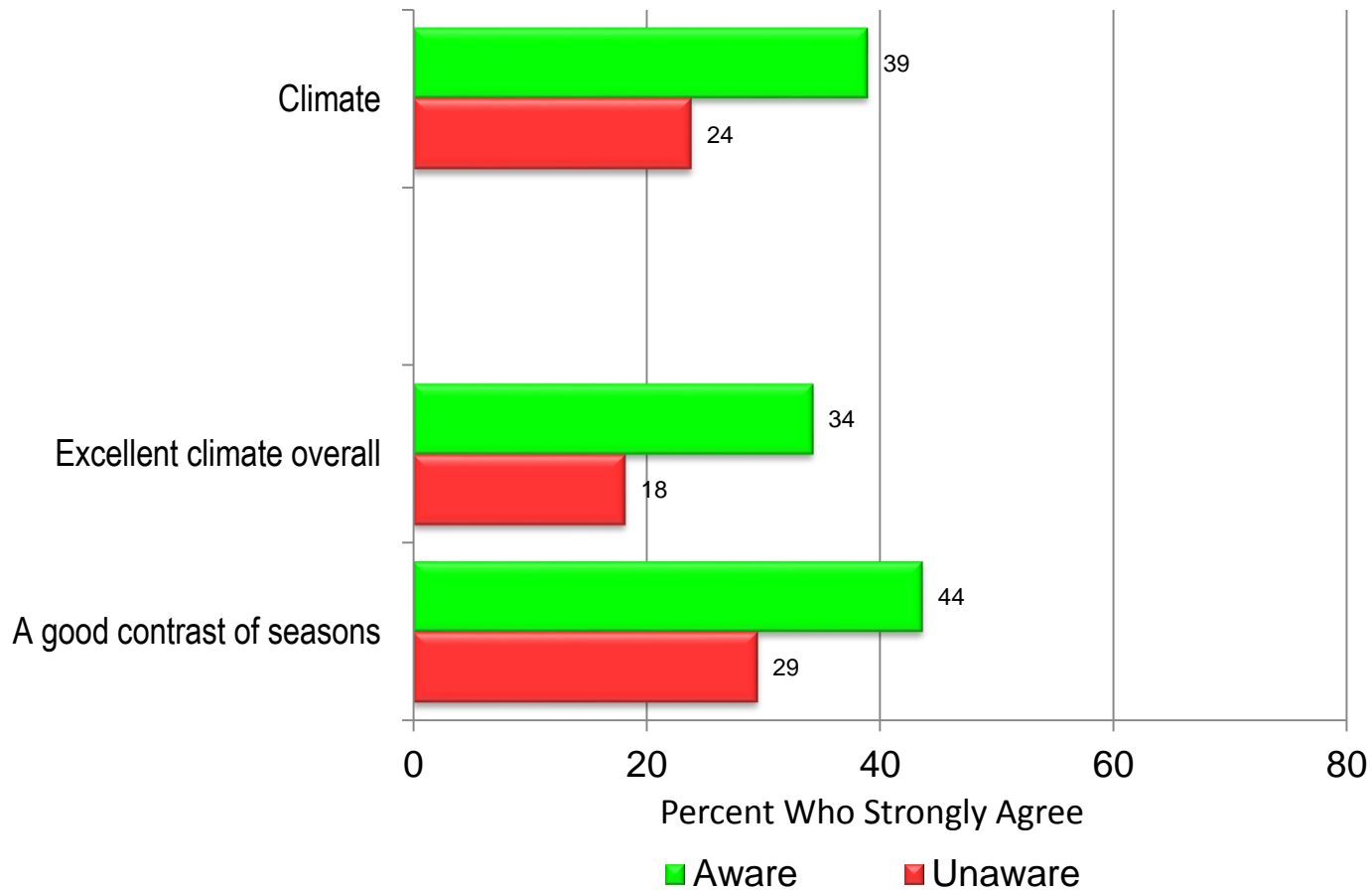
Base: Total Travelers



# Oklahoma's Image — Climate



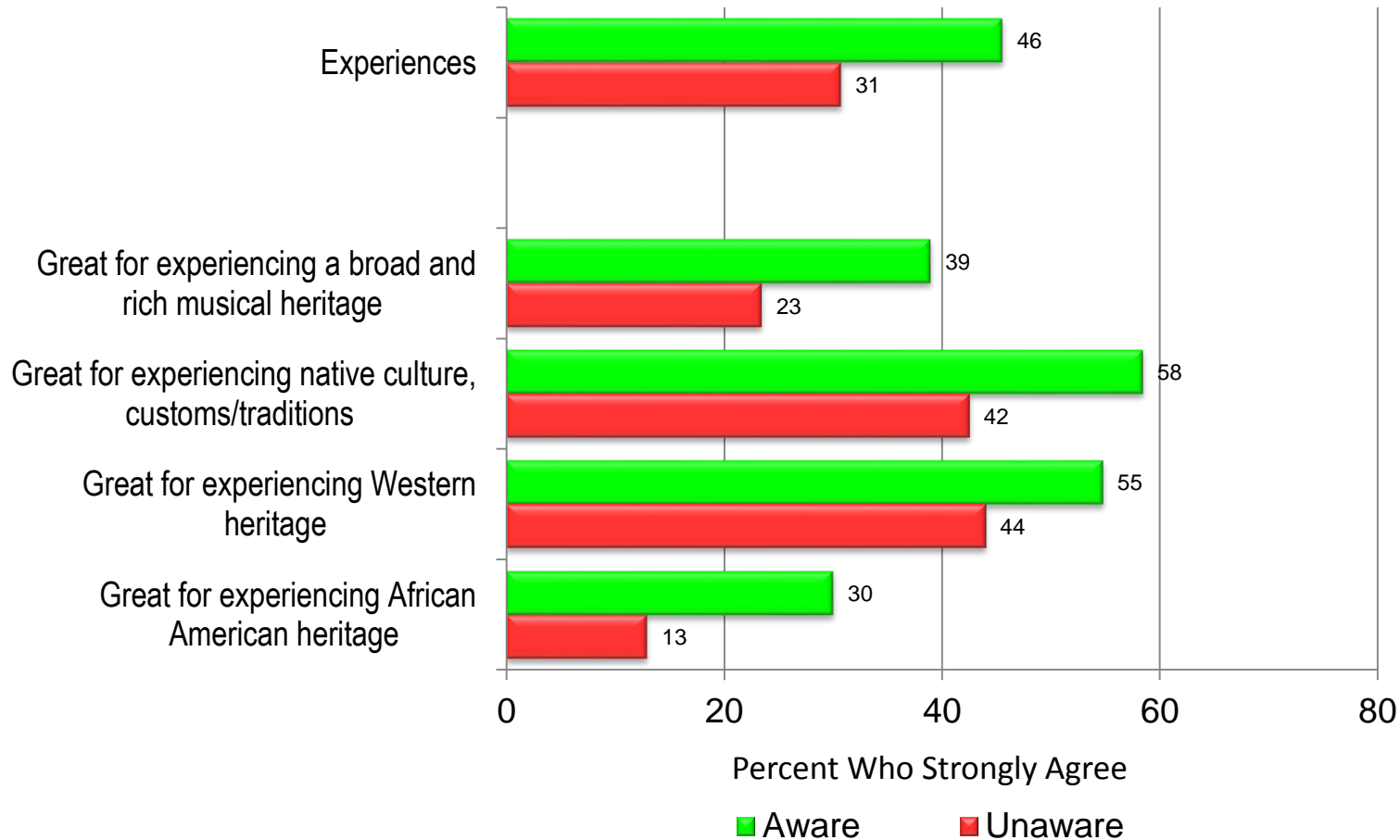
Base: Total Travelers



# Oklahoma's Image — Experiences



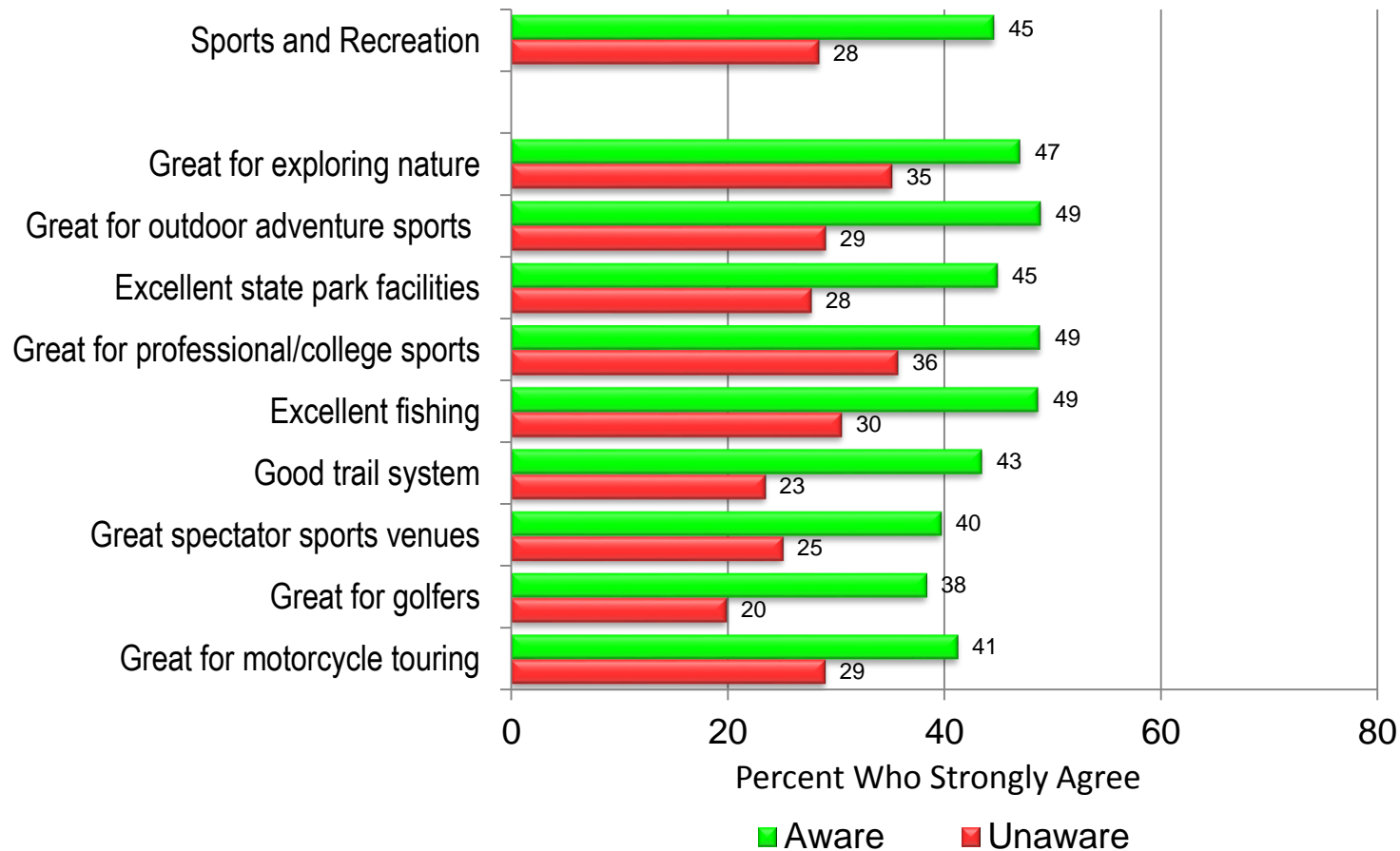
Base: Total Travelers



# Oklahoma's Image — Sports & Recreation



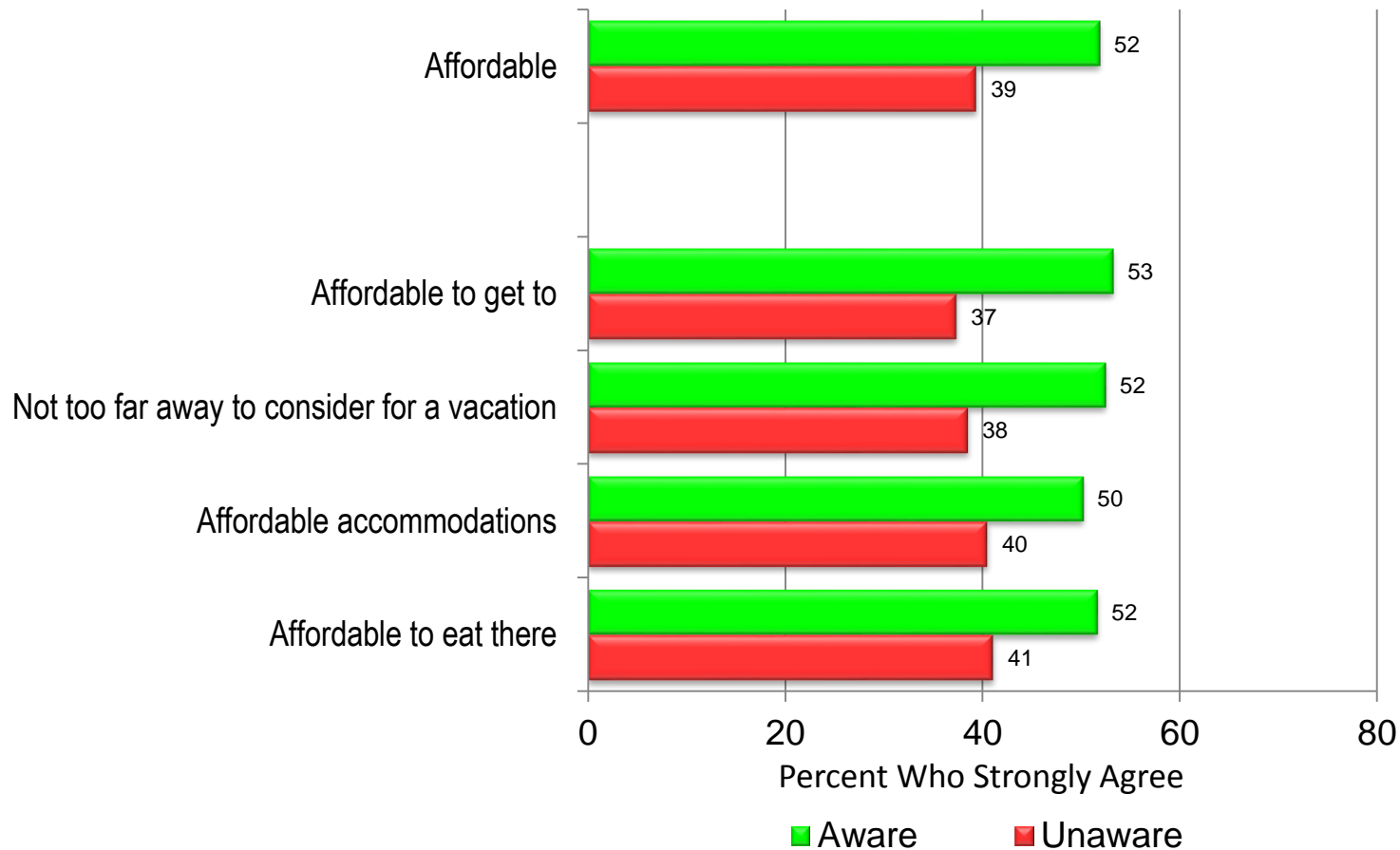
Base: Total Travelers



# Oklahoma's Image — Affordable



Base: Total Travelers

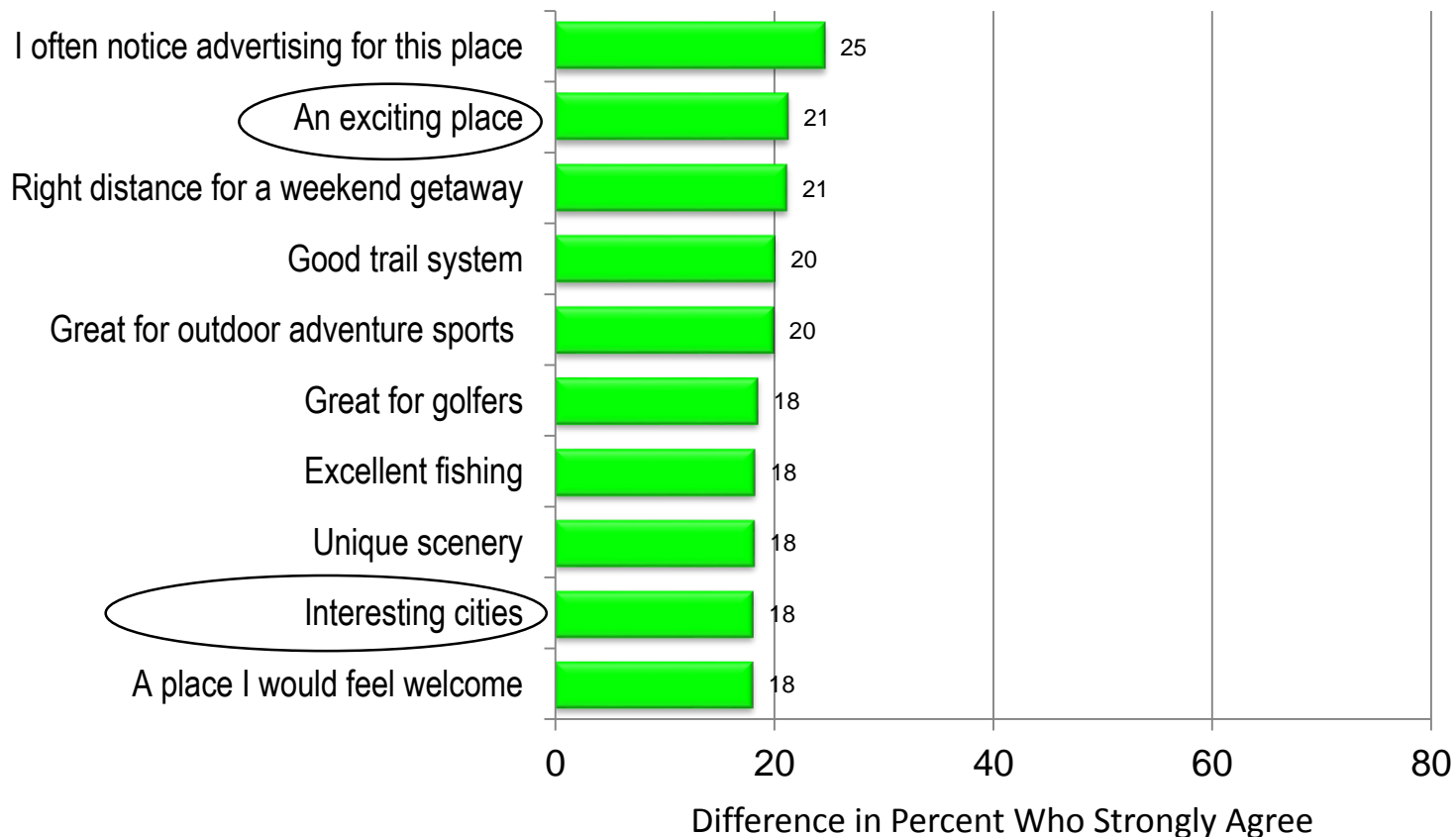




# Attributes for Which the Campaign Had the Greatest Impact



Base: Total Travelers

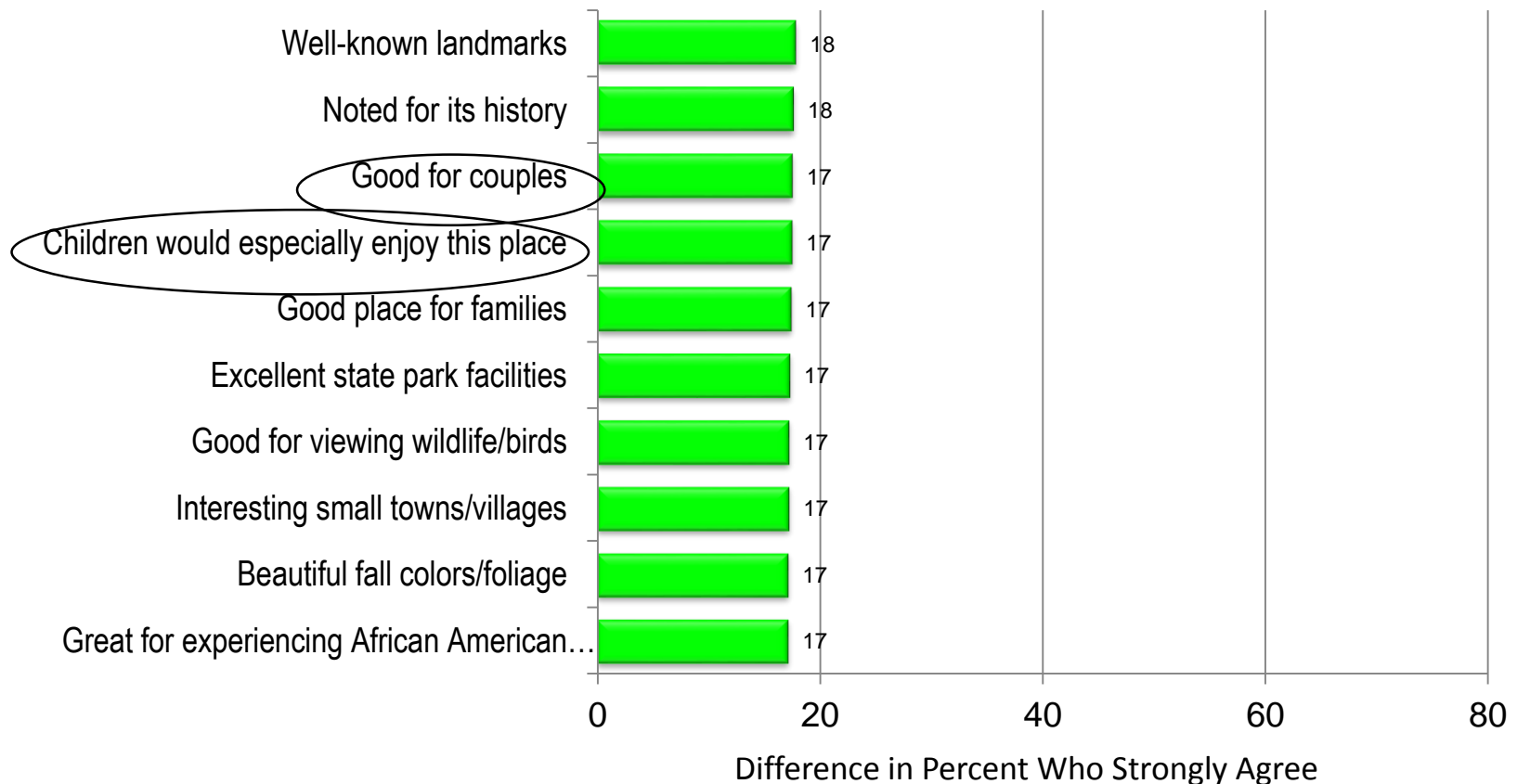


\* Circled attributes are some of the most important image hot buttons for travelers

# Attributes for Which the Campaign Had the Greatest Impact – Cont'd



Base: Total Travelers

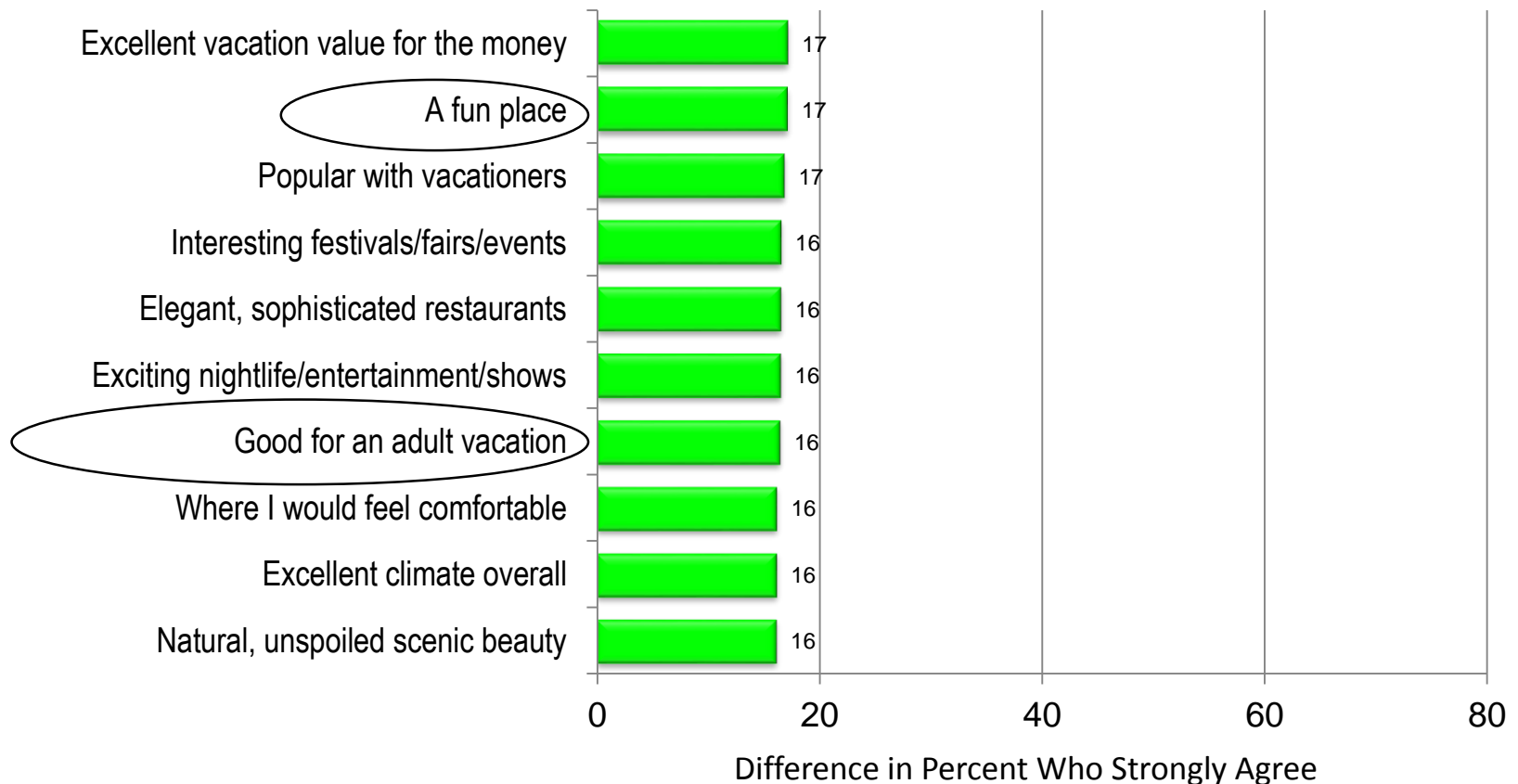


\* Circled attributes are some of the most important image hot buttons for travelers

# Attributes for Which the Campaign Had the Greatest Impact – Cont'd



Base: Total Travelers



\* Circled attributes are some of the most important image hot buttons for travelers

# Short-Term Impacts of the Advertising

# Advertising Impacts



- ⊙ Based on Longwoods methodology, we estimate that the investment of \$2.2 million dollars generated in the short term:
  - ⊙ *1.22 million new visitors to Oklahoma who would not otherwise have come*
  - ⊙ *these incremental visitors spent approximately \$205\* million in Oklahoma*
  - ⊙ *the incremental spending resulted in \$15.5 million in incremental state and local taxes\*\* or a return on investment of 7:1*
    - ⊙ *the incremental spending resulted in \$9.0 million in incremental state taxes\*\* or return on investment of 4:1 and \$6.5 million in incremental local taxes\*\* or a return on investment of 3:1.*

\*Based on Avg. Spending estimates from 2014 TNS Travels America

\*\*Based on State (4.4%) + Local (3.2%) tax rates from Oklahoma (7.6% total)

# Advertising Impacts



- ◉ In addition to the short term impacts, we estimate that the advertising has influenced the planning of a further 4.2 million trips to Oklahoma in 2015.
- ◉ While not all of these planned trips will happen, we expect that a significant percentage will convert, adding significantly to the return on Oklahoma's investment in Tourism Marketing.

# Short-Term Impacts of The Advertising



	2015
Ad Investment (including production costs)	\$2,249,972
Incremental Visits	1,222,257
Incremental Spending	\$204.6 M
State and Local Taxes	\$15.5M
<b>Spending ROI*</b>	<b>\$91</b>
<b>Total Tax ROI**</b>	<b>\$7</b>
<b>State Tax ROI**</b>	<b>\$4</b>
<b>Local Tax ROI**</b>	<b>\$3</b>

- Incremental visitor spending per ad \$ invested.

Spending is based on \$192 per person for overnight trips and \$45 per person for day trips

\*\* Incremental taxes per ad \$ invested.

# Short-Term Impacts Summary



	2015
Advertising Investment	\$2,249,972
Incremental Spending	\$204.6M
Incremental Taxes	\$15.5M
<b>Total Tax ROI</b>	<b>\$7</b>
<b>State Tax ROI**</b>	<b>\$4</b>
<b>Local Tax ROI**</b>	<b>\$3</b>



# Campaign Efficiency



	2015
Incremental Visits	1,222,257
Ad Investment	\$2,249,972
<b>Ad \$'s per Trip</b>	<b>\$1.84</b>
<b>Trips per Ad \$</b>	<b>.54</b>

# Longer-Term Impact of Advertising — Intent to Visit Oklahoma

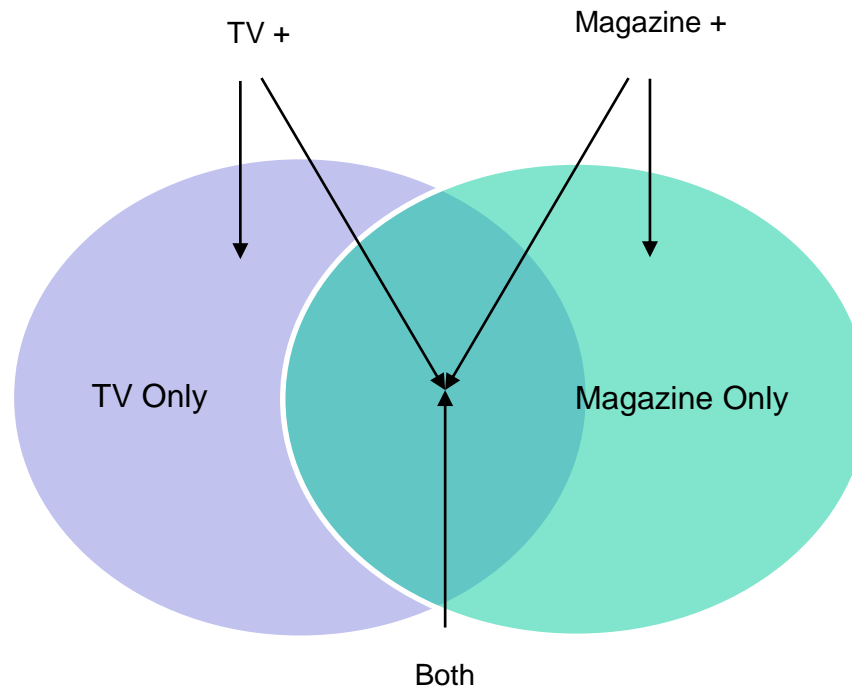


Intend to Visit Oklahoma in Next 12 Months	
Overnight	2,080,304
Day	2,117,712
<b>Total Intenders</b>	<b>4,198,016</b>

# **Appendix:**

## **Media Diagnostics**

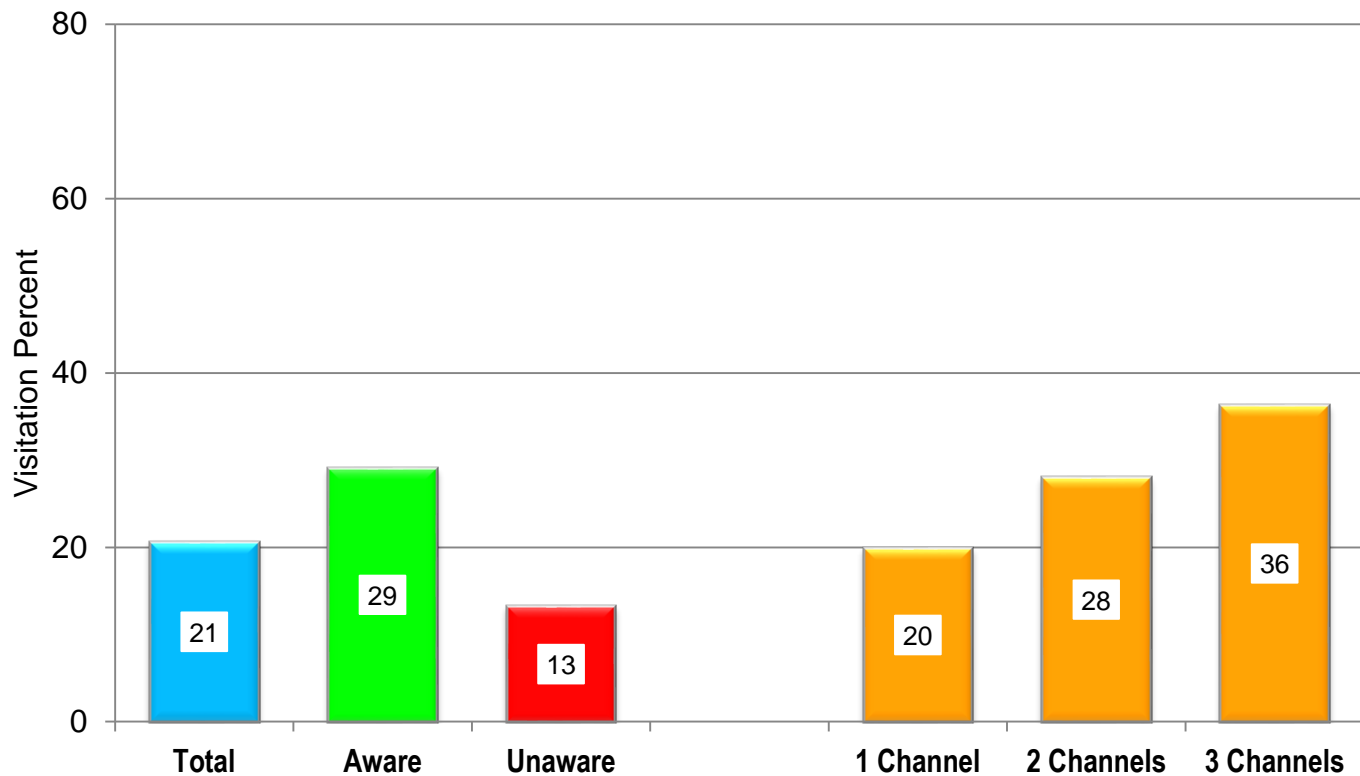
# Definition of Awareness



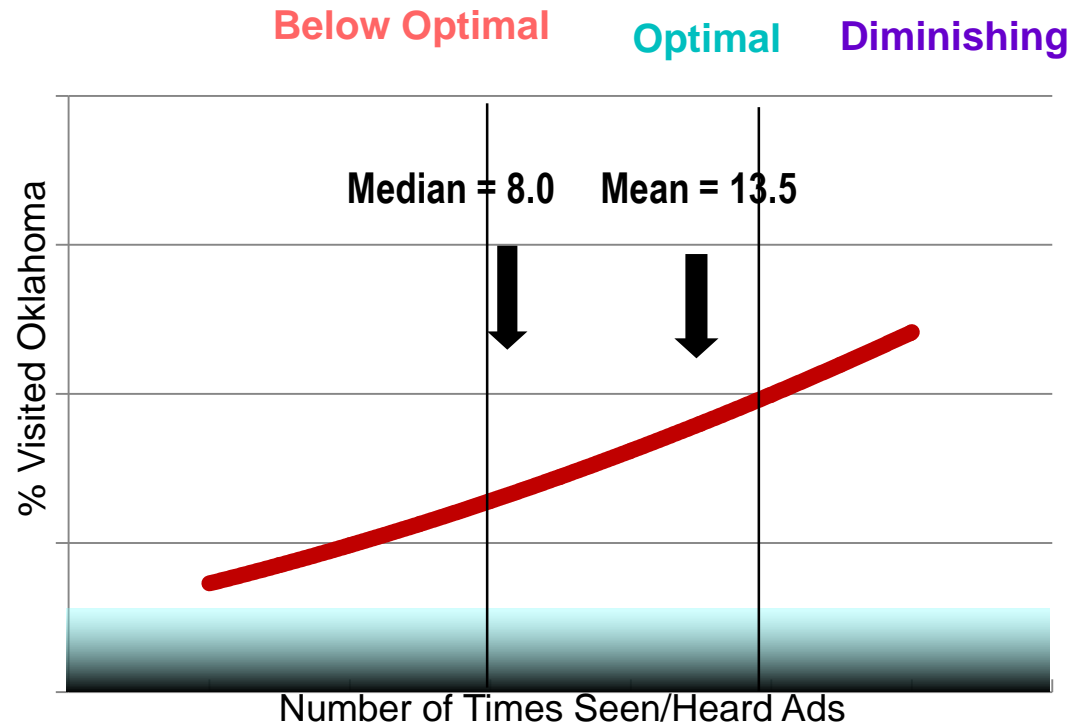
# Impact on Visitation by Number of Media Channels



Base: Total Travelers



# Impact of Ad Frequency on Visits to Oklahoma



# Appendix: Economic Development Image Ratings

# Economic Development Image Ratings



- ◉ And while it has been suspected that tourism advertising and visitation has a role in every aspect of economic development, what has been missing is data quantifying that impact. Longwoods International undertook new research to unlock the relationship between tourism advertising and visitation on a destination's image for all other economic development objectives. The results of that research are in and groundbreaking.
- ◉ Longwoods research showed in every case, tourism advertising by a destination and subsequent visitation to that destination significantly improved the image of the destination not just as a place to visit, but also for a wide range of other economic development objectives.



# Economic Development Image Ratings – Cont'd

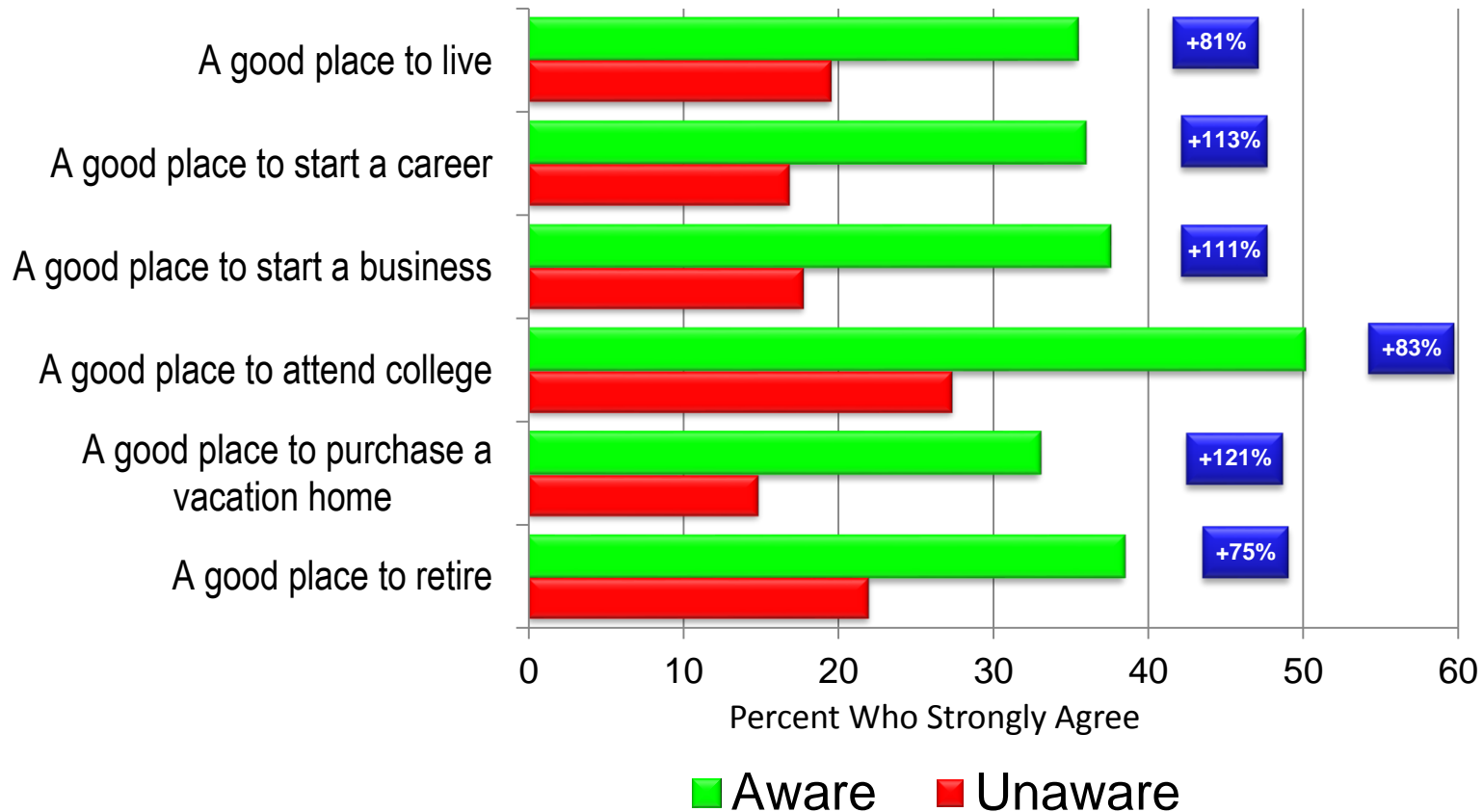


- ◉ It is not different for Oklahoma. For each of the six image ratings, Oklahoma's score increases with advertising awareness and visitation. The combination of the two also provides a sizeable lift, especially for the image attributes of "a place to start a career," "a place to start a business," or "a place to live."
- ◉ Oklahoma ratings compare positively to the advertising normative levels but are lower for visitation. This is consistent with data provided earlier in this report.

# Impact of Oklahoma 2015 Tourism Campaign on State's Economic Development Image



**Base: Out-of-State Residents**



# Impact of *Visitation* on Oklahoma Economic Development Image



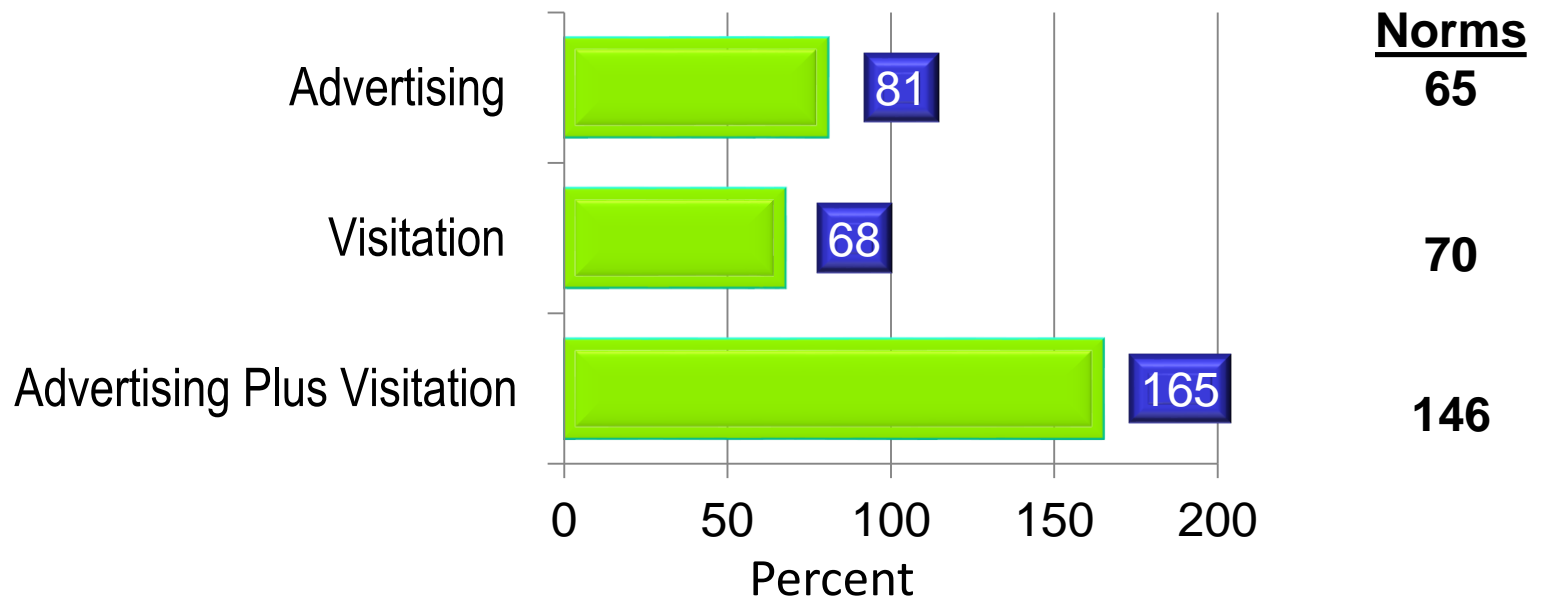
Base: Out-of-State Residents



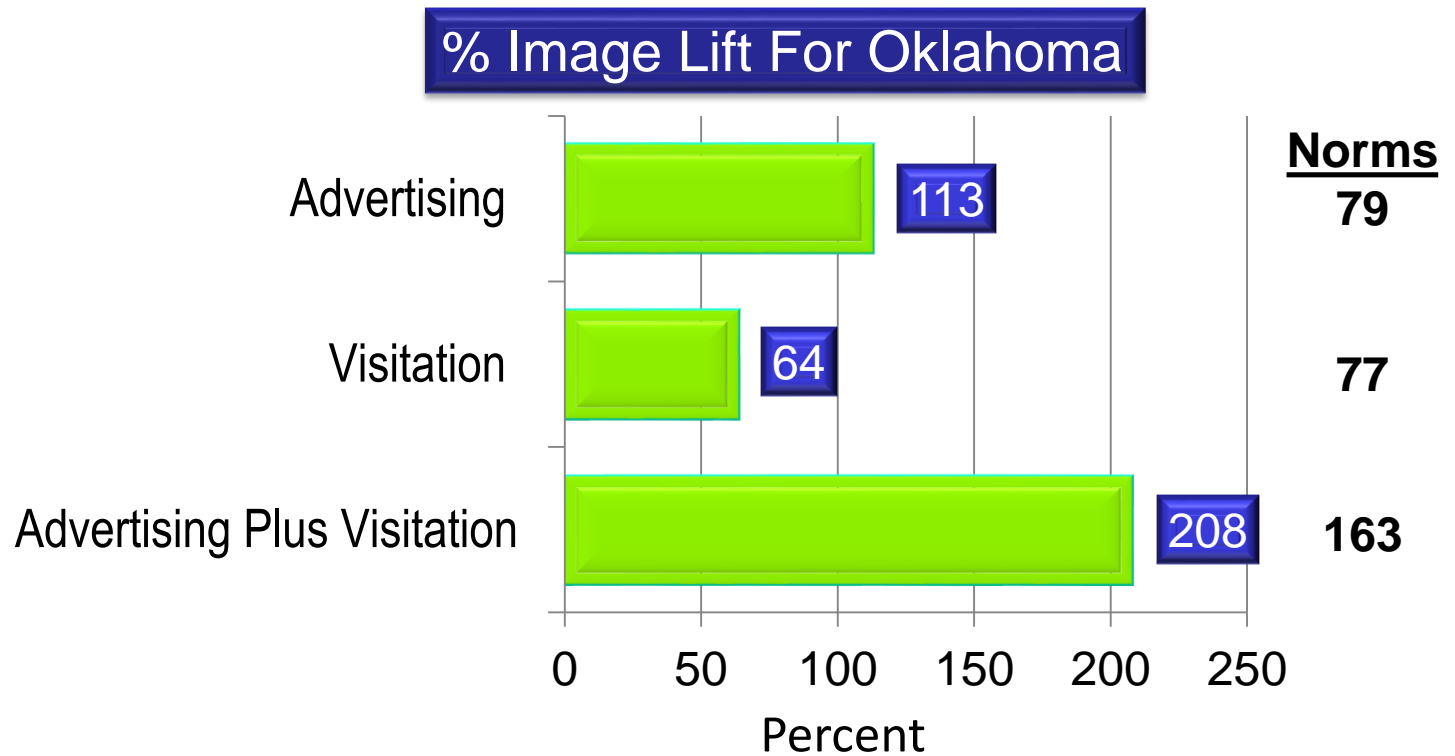
# “A Good Place to Live”



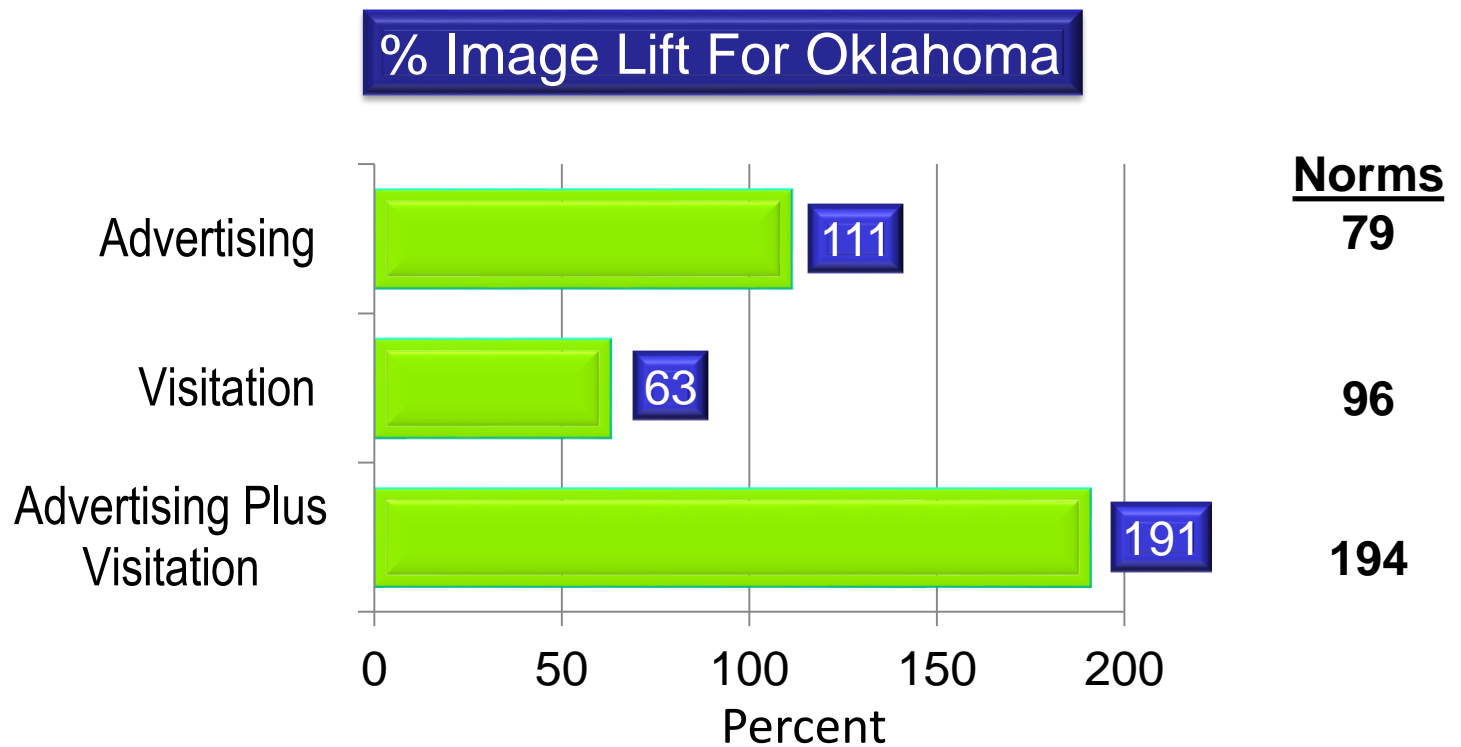
## % Image Lift For Oklahoma



## “A Good Place to Start a Career”



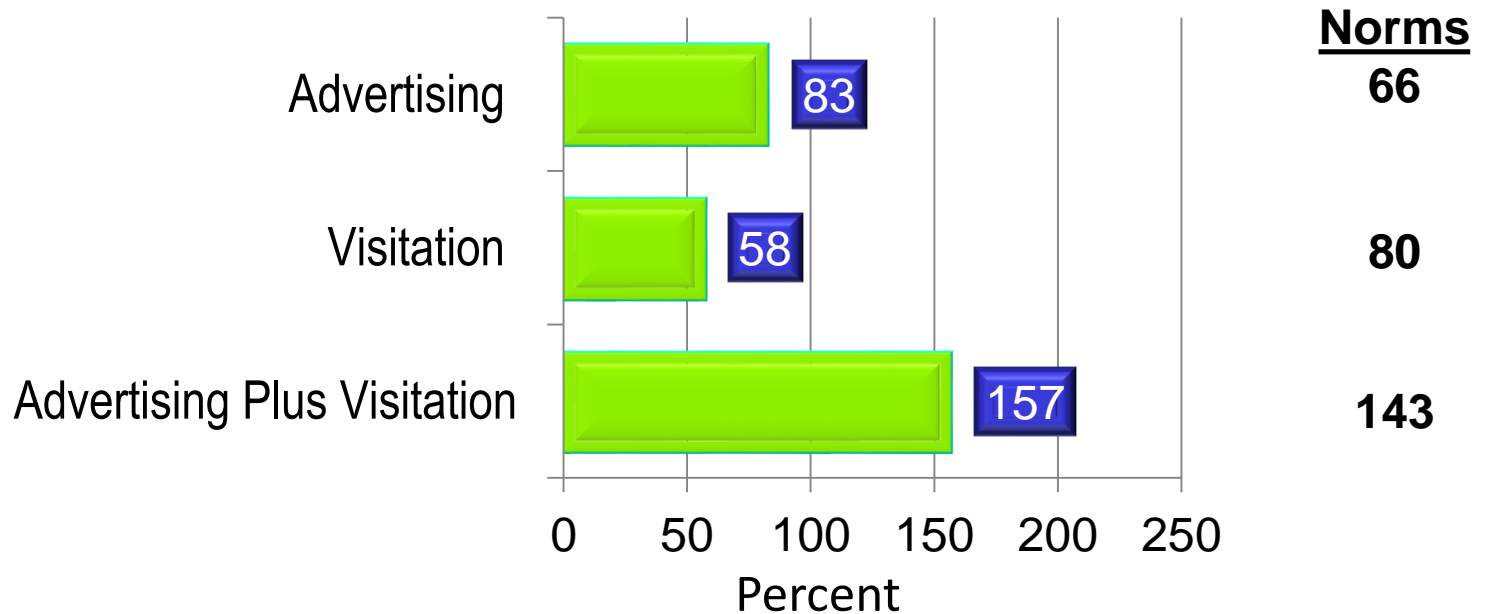
# “A Good Place to Start a Business”



# “A Good Place to Attend College”



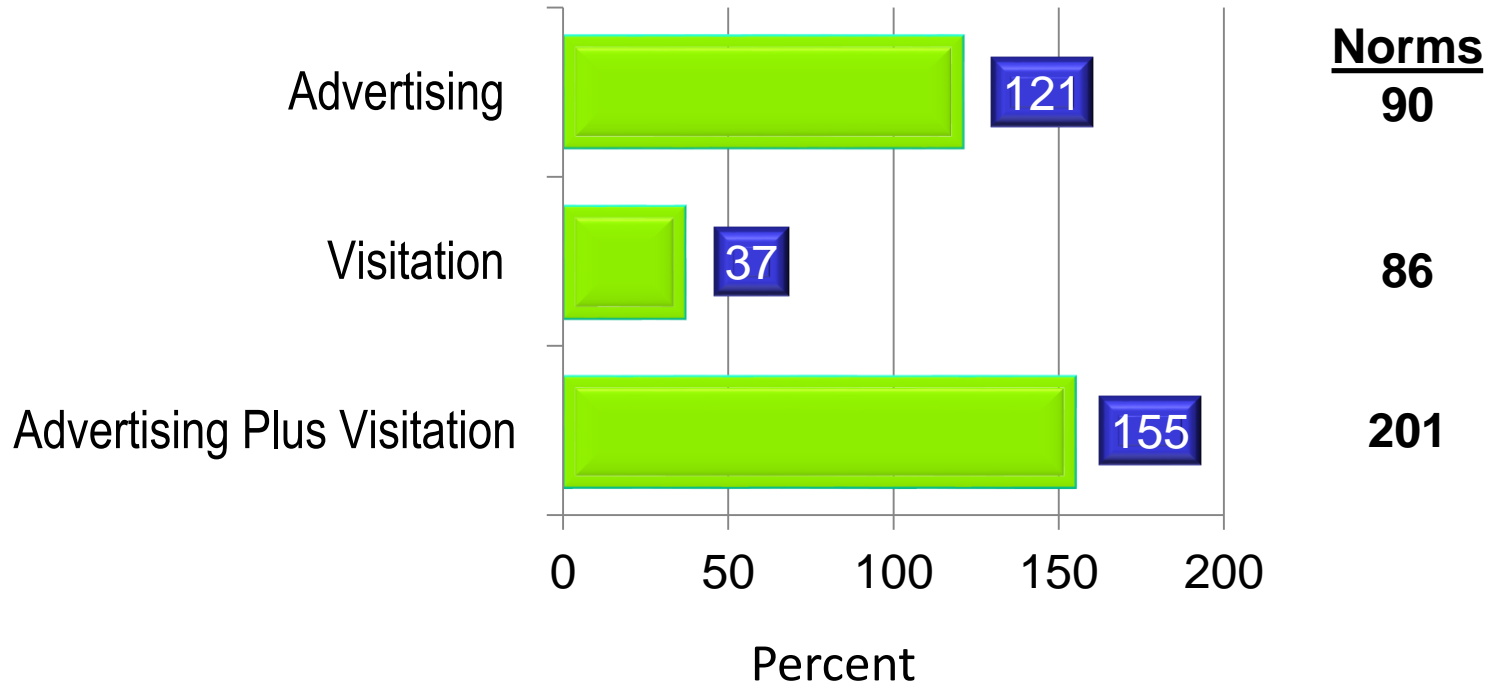
## % Image Lift For Oklahoma



# “A Good Place to Purchase a Vacation Home”



## % Image Lift For Oklahoma





# “A Good Place to Retire”



## % Image Lift For Oklahoma

