



Oklahoma Tourism and  
Recreation Department

## 2009 Conversion & Ad Effectiveness Research

November 2009



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# Background & Objectives

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The tourism and travel industry has been dramatically changed by shifting communication and information technologies. In the days before the Internet, travelers would learn about alternative travel options by contacting states and destinations and requesting they be sent brochures and guides. Today, the Internet provides instantaneous fulfillment for these searches and gives travelers a multitude of information, options, and deals – all available at a mouse click. Travel marketing has had to react to this explosion of alternative communication paths, which include not only the Internet, but also an endless array of cable channels and social networking. All of this demands a shift in the performance tracking of tourism marketing efforts to capture the changing dynamics of the marketplace.



The Oklahoma Tourism & Recreation Department (OTRD) has reacted by changing its research to measure the effectiveness of its advertising and marketing efforts. While at one time only the vacation guide *requesters* were surveyed to determine if they had visited or converted, the last study – conducted in 2007 – was expanded to measure the impact of advertising on those who did not request a guide. This provided a baseline for both populations and resulted in a comprehensive overview of the impact of the marketing efforts. This research builds upon the study conducted in 2007 to provide a thorough assessment of the effectiveness of OTRD’s marketing and promotional efforts. Specifically, this research effort was designed to address the following informational objectives:

- Measure the ability of the advertising to reach the target audience as measured by both reported recall of the campaign and awareness measures resulting from exposing travelers to the ads used and validating their recall;
- Evaluate the effectiveness of the campaign overall and provide an assessment of its key components, including:
  - The relative effectiveness of discrete media ranging from print and TV to online advertising;
  - The overall strengths and weaknesses of individual markets in terms of visitation, potential, and impact of the advertising efforts; and
  - The role of the advertising in impacting consumers’ attitudes about the state as a vacation/getaway destination.

- Determine the impact of the marketing efforts by evaluating influenced and incremental travel;
- Determine the level of conversion among those who requested information or those who visited the [www.travelok.com](http://www.travelok.com) website. The extent of travel among these *requesters* provides a measure of how effectively the fulfillment efforts influence the travel plans of this important group;
- Quantify the economic impact and ROI that result from spending on food, lodging, attractions, etc. This impact will be reviewed by individual market and by in-state versus out-of-state spending;
- Assess the travel planning behavior of the target markets in terms of the length of the planning period, the likelihood to visit, actual visitation, and intent to return to Oklahoma and its competitive states;
- Evaluate the marketing tools, including the ad campaign, travel guide, and state website and explore their role in the decision-making process; and
- Provide demographic and psychographic visitor profiles, building on past efforts to help better refine and target future marketing approaches.

# Executive Summary

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- A key issue this year was how the current economic situation influenced travel. Consumers indicated that they had traveled less, and they reported fewer trips and shorter trips. Overall, the rate of travel to virtually every state in the competitive set recorded a decline – with travel to Oklahoma dropping three percentage points or 10% (a drop slightly lower than average). Yet, it is often when purchase behavior wanes that advertising can have a significant positive impact, and lessen the negative impact.
- Overall, OTRD’s advertising campaign was able to reach 3.3 million households in its 12 target markets, with 64% of the respondents recalling at least one of the ads. This level of ad awareness is higher than 2007 reflective of the increased media expenditures.
- The number of people requesting information from OTRD was somewhat lower compared to 2007, although there were some changes in the counting process. Overall, approximately 675,000 people gathered info through OTRD’s website or travel guide.
- The campaign was responsible for many more trips to the state. The measure of impact for the advertising is the level of incremental travel – the number of trips that would not have otherwise occurred, and this rose from 116,000 trips to 229,000 in 2009. For leads, the measure is the influenced level of conversion, which rose from 8.8% to 15.7%.
- The combined impact of the advertising and conversion was 283,000 trips that would not have occurred. These trips generated \$148 million in economic impact. This means the return on investment was \$59 for each \$1 spent on media and advertising.
- The ads worked because they effectively communicated that there is a lot to do in the state, and they created interest in gathering more information and then visiting the state.
- Additionally, the advertising had a positive impact on the image of the state. Those who had seen the advertising were much more favorable about Oklahoma. It is encouraging that some of the strongest impacts are on the key messages of the ads, including *plenty to see and do* and *value* – two ubiquitous messages in this year’s television advertisements.

# Methodology

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This research consisted of two discrete data collection efforts, one focused upon requesters or leads (conversion research) and the other centered on travelers in the markets where advertising was aired. Given the diversity of both issues and respondents, each of these efforts had a distinct survey instrument and sampling plan. Although the results will be considered together in what follows, the methodological details need to be reviewed separately.

## Conversion Research Methodology

The portion of this research that focuses upon requesters or leads is designed to measure the percentage of responders who actually visited the state for an overnight trip, specifically the conversion rate. Additionally, the percentage of these trips that were influenced by the advertising website or travel guide is determined. Finally, these results are combined with the *ad effectiveness* effort to produce an ROI measure of the campaign spending. In total, OTRD recorded 674,304 contacts, most of which were generated via the Internet. Of these a total of 35,226 provided contact information. It was these *leads* that provided the sample for this research.

Specifically, 628 surveys were completed – 162 utilizing telephone interviews and 466 were conducted online. Geographic quotas were not set since the total sample was insufficient to analyze at a DMA level, yet the overall sample distribution was representative of the total lead population. However, at the completion of the data-collection effort the sample was weighted to reflect the geographical distribution of the entire database.

Data Collection Method	
Telephone	162
Internet	466
Geography	
Primary Markets	244
Secondary Markets	87
Non-target Markets	297
<b>Total</b>	<b>628</b>

The questionnaire that was employed for this research was similar to that used in 2007 – however, it was edited to focus upon the core issues of this survey effort and to be consistent with the ad effectiveness element where possible to allow for the consideration of these two survey efforts together. The primary thrust of this survey was upon conversion and associated trip specifics, along with an assessment of key influences to help determine influenced trips or net conversion. A copy of the questionnaire can be found in the Appendix of this report.

## Ad Effectiveness methodology

While the conversion research element focuses upon *leads*, the ad effectiveness portion of this research centers on leisure travelers in the targeted media markets. In a similar fashion the objective of this effort is to measure the incremental travel and associated return of investment generated by the advertising (that which would not have occurred in the absence of the advertising). Additionally, this research can serve as a strategic tool to help direct future advertising spending in terms of media markets and communication strategies. As a result, while the conversion research focused on leads overall, the study design of this effectiveness measure begins at a market or DMA level.

Specifically, a total of 2,668 interviews were completed. Respondents were e-mailed an invitation to an online survey with a link to this questionnaire. They were screened to have taken a leisure trip in the last year. Quotas were established by market to allow for a review of the individual DMAs – and these results were subsequently weighted to reflect the number of traveling households within each market.

In addition to image considerations, travel behavior inclusive of trip specifics and spending, respondents were shown the actual OTRD ads and asked if they had seen them. To further assess online recall a total of 1164 respondents were re-contacted and shown just the online creative. This determined the level of advertising awareness. Then the level of travel of respondents who saw the advertising was compared to those who had not and the additional rate of travel is the incremental travel that can be attributed to the advertising. A copy of the questionnaire utilized in this portion of the research can also be found in the Appendix.

## Reporting

In the report which follows, the results of both of these research efforts are considered separately and together. With respect to many of the issues, they were only addressed with one of the two populations – for example, conversion and awareness. Yet other issues, such as overall travel behavior, were addressed with both groups. In those cases the data is combined. They are weighted relative to their respective populations. Furthermore, their findings support one another. For example, in the ad effectiveness research, 5.8% from the target markets reported ordering a travel guide. Given the number of traveling households in those markets, this would represent slight over 300,000 orders – which is precisely the number of target market guides received.

Completed Interviews	
Dallas-Fort Worth, TX	557
Kansas City, MO-KS	471
Oklahoma City, OK	284
Springfield, MO	258
Little Rock-Pine Bluff, AR	230
Tulsa, OK	223
Wichita-Hutchinson Plus, KS	200
Fort Smith-Fayetteville, AR	121
Joplin-Pittsburg, MO-KS	112
Wichita Falls & Lawton, TX-OK	87
Amarillo, TX	83
Sherman-Ada, TX-OK	42
<b>Total</b>	<b>2,668</b>

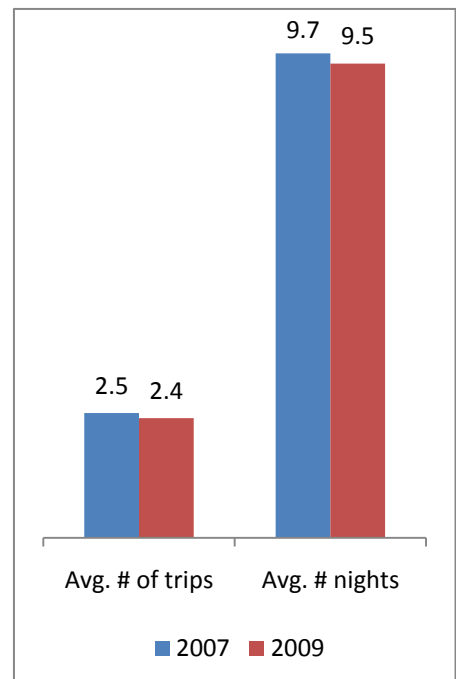
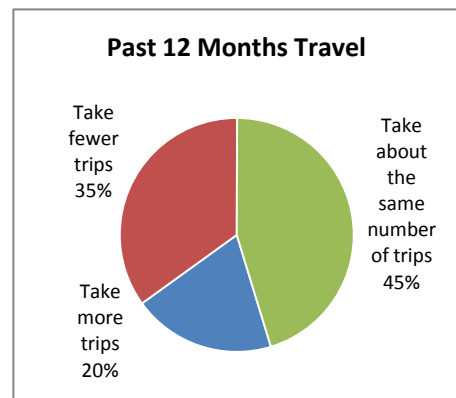
# Travel Environment

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When this research was last conducted in 2007, the summer travel season was accompanied by extremely high gasoline prices, which were thought by many to have a significant downward impact upon travel. In many ways those events pale by comparison to the negative economic climate of 2009 and a long and deep recession that has plagued a wide swath of industries. Clearly automakers suffered greatly, with two of the big three declaring bankruptcy and accepting federal bailout money. And while this troubled period began with failures on Wall Street and trickled down to main street banks, clearly a significant casualty of recession and unemployment would be the travel and tourism industry. And this has been seen in a number of travel indicators such as air travel and hotel occupancy rates.

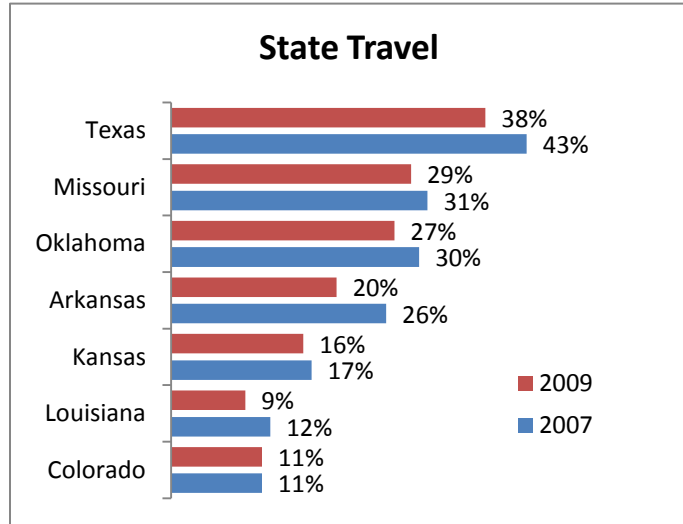
In light of this, a number of issues were addressed among both survey populations to attempt to quantify the impact of the economy upon Oklahoma tourism. Most generally and directly, respondents were asked whether they had taken fewer trips in the last year. The balance tipped sizably to the group as a whole taking fewer trips. This would clearly suggest that the market as a whole is down. The meaningful question becomes what this reduction in travel translates to in terms of actual travel to Oklahoma and the competitive set. This can be reviewed in a number of ways.

Two ways are to look at how many trips on average travelers are taking and how many nights they are staying. As can be seen in the accompanying chart, while both trips and nights are down, the decline is reasonably modest. Interestingly, these comparative findings between 2007 and 2009 are similarly reflected when we consider the number of trips taken by those claiming to be taking fewer trips (those who say they are taking fewer taking 2.4 trips and those taking the same taking 2.5). This decline will clearly influence Oklahoma travel and may well be reflected in measures of conversion and overall visitation rates. Additionally, with somewhat less travel occurring this year, this can also be potentially reflected in lower awareness levels if people are thinking less about traveling. This is an important context to keep in mind. However, this decline, while not inconsequential, is quite small.

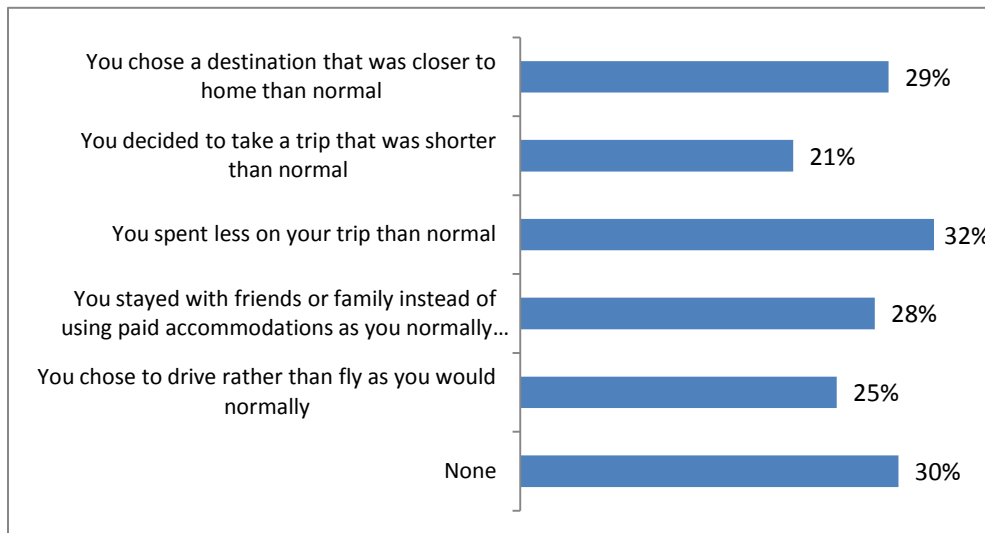




When actual travel to the competitive set is considered, the importance of the decline becomes apparent. The rate of travel to virtually every state in the competitive set declined – with travel to Oklahoma dropping three percentage points or 10%. No doubt this will be reflected in the industry in the state and can be seen, for example, in hotel occupancy rates. However, in terms of the effectiveness of advertising, during travel slowdowns these marketing efforts can be important in retarding travel declines. Additionally, for the most part the focus of this research is incremental travel, which can occur even in such an environment. But the context remains important.



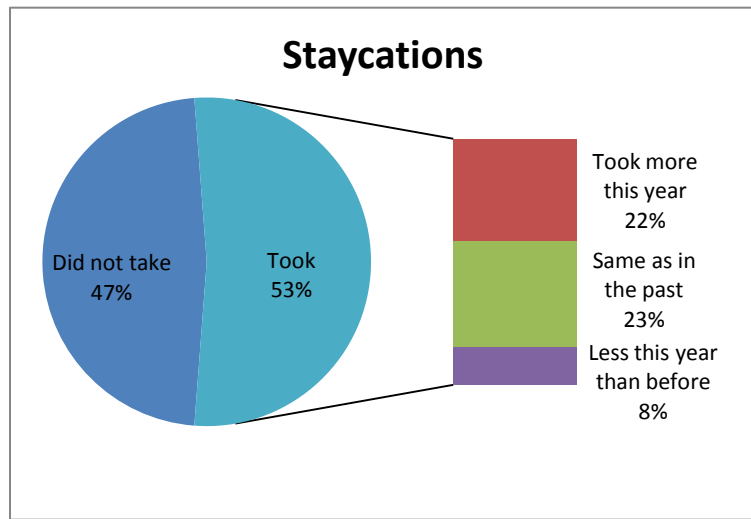
Of course, changes in travel behavior can manifest themselves in more than simply fewer nights. Other changes are shorter trips, closer trips, driving trips, and other measures to save money, including VFR. Between 20%-30% did all of the behavior changes listed below.



Another way of controlling travel expenses is the notion of a “staycation” or staying in or around one’s home instead of taking a longer trip. While this isn’t a new phenomenon, more people did this in 2009 than in the past. This, too, can have impact on overall travel – however, there can be two sides to this reality. Often in negative economic times, people don’t stop travelling; they just stay closer to home. In this regard what we might expect to see is market performance being strong in the in-state and nearby DMAs, which will be

considered later in this report. At the same time, if more people stay close, it can be harder to generate “incremental” travel.

In summary, the travel environment in which the 2009 campaign has taken place is slightly less favorable than in the past. We might expect this to have implications in terms of overall travel and level of interest.

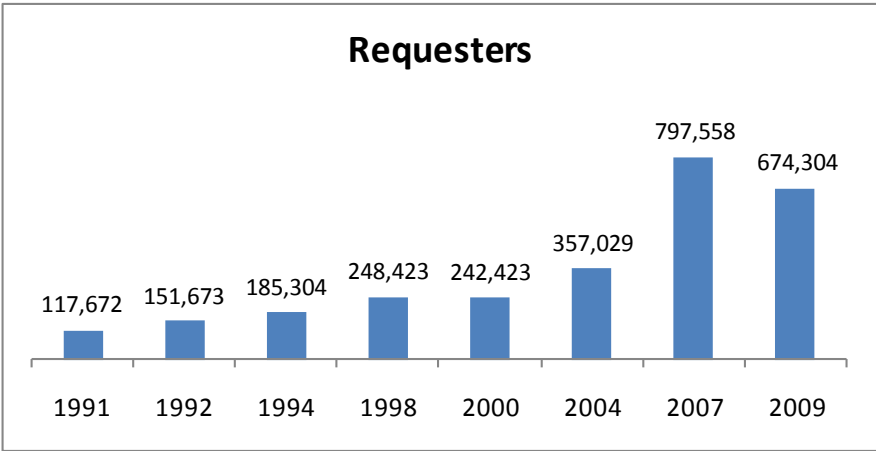


# Lead Generation & Conversion

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Having considered the overall travel environment, at this point a review of the OTRD’s effectiveness at influencing visitation is in order. Marketing efforts consist both of paid media advertising and more traditional fulfillment efforts like the travel guides and brochures often requested via the website. Consider first the population of leads or requesters.

The OTRD collected nearly 675,000 leads during 2009. While this represents a drop from 2007, it should be noted that some changes were made in how leads were counted (spiders and bots were not counted this year), which is likely the reason for a portion of the decline. Another reason for the decline might be the impact of the economic downturn and lower overall interest in leisure travel. That said, the OTRD was successful in generating a large quantity of leads despite the current trend of leisure travel declines.

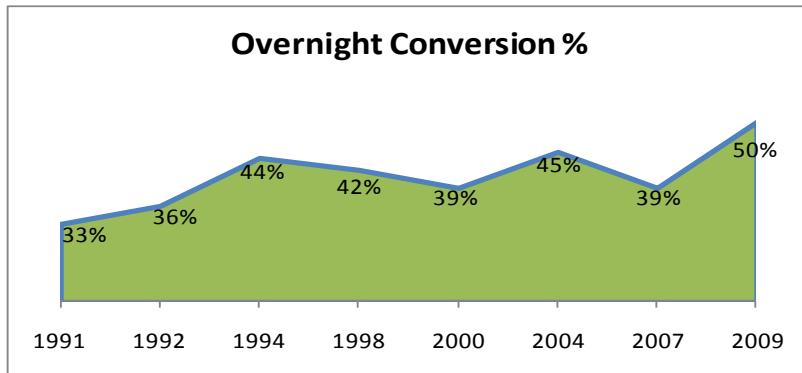


Conversion Study

SMARI has observed in other recent studies a trend of fewer leads but stronger conversion rates. It seems that in the time of an economic downturn there is less travel interest, but those who *are* interested are actually higher quality leads – which could foretell a higher conversion rate. It should also be noted that the website continues to grow as the dominant lead generation vehicle, with 97% of this year’s leads generated via the Internet compared to 95% in 2007.

## Requests Decline, but Conversion Rate Increases

It seems that those who requested information were indeed higher quality leads, as the rate of overnight conversion increased considerably from 2007. The stronger conversion rate led to more converted households despite the decline in leads.



Conversion Study

	2007	2009
Responses	797,558	674,304
Conversion	38.8%	50.1%
Converted HHs	309,453	337,751

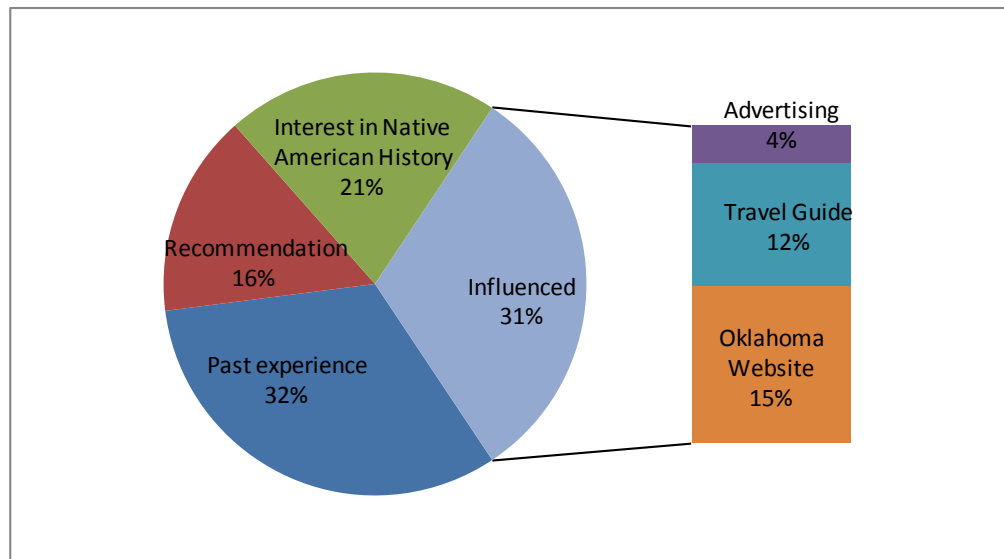
Conversion Study

## OTRD Efforts have Stronger Influence than in 2007

Of course some people would travel to Oklahoma even if no advertising, website or travel guide were available. The concept of *net conversion* involves identifying those who were influenced by OTRD’s marketing efforts specifically.

The challenge is determining the percentage of trips that were influenced by the OTRD’s marketing (including the website, travel guide, and advertising). The research explored six potential visitation influencers for which respondents rated their impact on a 10-point scale, where the higher the number, the stronger the influence. The influencer rated highest by the respondent is considered their strongest influencer.

The chart to the right shows the distribution of the strongest influencers. A trip is considered influenced by the OTRD if the strongest influencer was the website, travel guide or advertising – so it turns out that 31% of trips were directly influenced by OTRD’s efforts.



Conversion Study

The next step is to calculate *net conversion*, which is simply the overnight conversion rate multiplied by the percentage of trips influenced by the OTRD’s marketing. The result is a net conversion rate of 15.7%, which is considerably stronger this year than what was achieved in 2007. The increase is driven by stronger OTRD influence and a higher overnight conversion rate.

	2004	2007	2009
Overnight Conversion	44.8%	38.8%	50.1%
% Influenced	25.5%	22.7%	31.3%
<b>Net Conversion</b>	<b>11.4%</b>	<b>8.8%</b>	<b>15.7%</b>

Conversion Study

*OTRD directly influenced 31.3% of trips, resulting in a net conversion rate of 15.7%.*

## Influenced Trips Increase by 51%

The fundamental issue of this analysis is to determine how many trips were influenced by OTRD's marketing and the amount of economic impact, or travel revenue generated. Applying the net conversion rate to the number of responses indicates that OTRD's 2009 efforts resulted in approximately 106,000 trips and \$70 million in travel revenue – both notably higher than 2007 levels. While there were fewer leads generated this year, the significantly higher conversion rate and level of OTRD influence more than made up for the decline.

	2004	2007	2009
Responses	357,029	797,558	674,304
Overnight Conversion	44.8%	38.8%	50.1%
% Influenced	25.5%	22.7%	31.3%
Net Conversion	11.4%	8.8%	15.7%
Converted Trips	40,701	70,110	105,598
Avg. Trip Expenditures	\$636	\$641	\$664
Economic Impact	\$25,885,836	\$44,940,448	\$70,109,435

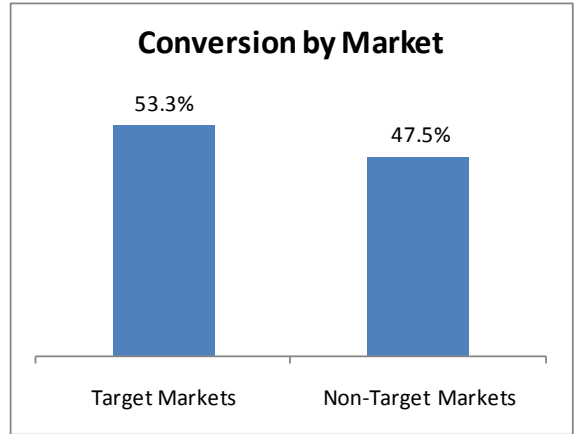
*Stronger conversion and OTRD influence made up for the drop in leads.*

### Conversion Study

Ultimately, the results from the conversion methodology and the ad effectiveness methodology will be combined to arrive at the total impact of OTRD's marketing efforts. To be conservative, ad effectiveness will be used to measure impact in the target markets, while conversion will quantify the non-target market impact. Thus, it will be important to evaluate the quantity of converted trips coming from the non-target markets.

## Non-Target Markets Generate More Converted Trips

As should be expected, the conversion rate in the target markets is higher. However, more responses from the non-target markets resulted in more converted trips (54,000 vs. 51,000). It is also interesting to note that non-target market visitors are coming from farther away, so they tend to stay longer and spend more – which is seen in their higher average trip expenditures. More converted trips and higher visitor spending led to much more travel revenue generated from the non-target markets.



Conversion Study

	Target Markets	Non-Target Markets
Responses	305,460	368,844
Conversion	53.3%	47.5%
% Influenced	31.5%	31.0%
Net Conversion	16.8%	14.7%
Converted Trips	51,286	54,312
Avg. Trip Expenditures	\$487	\$831
Economic Impact	\$24,975,896	\$45,133,539

Conversion Study

# Advertising Reach & Recall

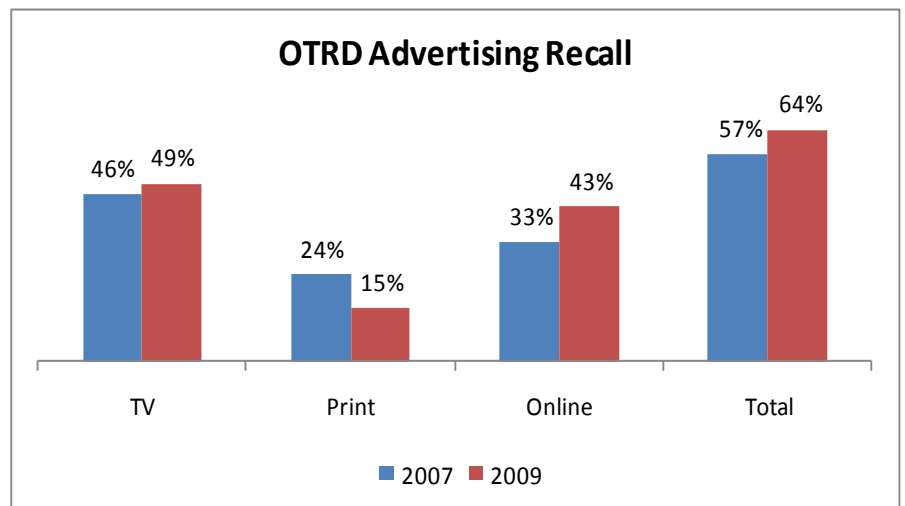
While the traditional conversion assessment addresses a key touch point of the state's marketing, traditional advertising represents the biggest expenditures and reaches the largest target population. As a result, it is important to review this segment in detail. First consider the overall media buy and change in spending and media mix.

The bulk of OTRD's 2009 advertising dollars were spent on television, followed by online and then print advertising. Total spending on the spring 2009 advertising campaign was about \$2.5 million, a notable 31% increase from the \$1.9 million spent in 2007. OTRD spent more across all individual media, with online advertising receiving the largest percentage increase – which could foretell stronger awareness levels this year.

	2007 Media Cost	2009 Media Cost	% Change
Television	\$1,304,011	\$1,581,258	21%
Print	\$204,926	\$218,366	7%
Online	\$395,000	\$522,782	32%
Other		\$181,111	
<b>Total</b>	<b>\$1,903,937</b>	<b>\$2,503,517</b>	<b>31%</b>

## Campaign Awareness Increases

Reflective of the significant increase in both television and online advertising, a gain in awareness was recorded in both of these media. While the recall of print advertising exhibited a decline, the overall campaign awareness results were higher than in the 2007 measure.



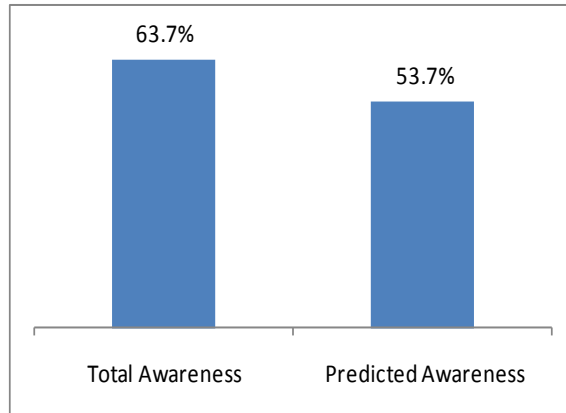
Ad Effectiveness Study

## Advertising Reach Outperforms Modeled Expectations

A challenge in evaluating overall awareness is determining whether the level of recall is "good." While difficult to assess, we can compare the awareness achieved to what we would expect given media spending and target populations.



Utilizing a wealth of historical data, SMARI has developed a model to predict awareness based on media spending per target household. According to the model, the 2009 OTRD campaign should be expected to reach 53.7% of the target population – while the actual awareness results significantly outperformed this predicted level.



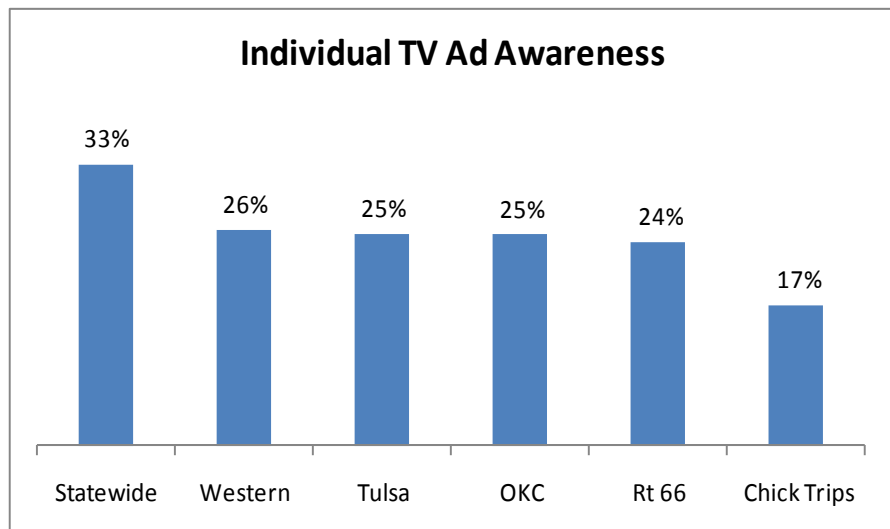
*SMARI's awareness model would suggest that the 2009 OTRD campaign was highly effective at reaching the target audience.*

While it is not possible to measure the difference between the actual and predicted values in terms of statistical significance, this clearly represents a strong performance in terms of awareness.

### Reach Varies among Television Ads

Several television executions were used in the 2009 OTRD advertising campaign. As such, a review of individual TV ad awareness can provide insight into which were more effective at breaking through and reaching the target audience. The “Statewide” spot stands out for having the strongest recall, while “Chick Trips” stands out for having the lowest recall.

Additionally, low awareness of “Chick Trips” might be due to niche appeal. To test this hypothesis, we compared “Chick Trips” awareness among several population cuts that could represent the “niche” target. However, it turned out that awareness is not higher among any of the groups tested.



Because some of the television ads ran in select markets, the findings become more meaningful when the awareness percentage is applied to the target household population to arrive at the total number of households reached. For instance, while the “Western” ad generated the second-highest awareness, it reached the fewest households by far because it only ran in the Arkansas markets. In contrast, the “OKC” ad ran in every market and thus reached the second-highest quantity of households.

TV Ad	Awareness	Target HHs	Aware HHs
Statewide	33%	4,539,142	1,514,165
OKC	25%	5,285,854	1,321,782
Tulsa	25%	5,127,192	1,283,748
Rt 66	24%	4,029,178	974,397
Chick Trips	17%	5,052,572	846,826
Western	26%	646,052	165,299

Ad Effectiveness Study

### Campaign Reaches 3.3 Million Households

This same approach of quantifying households reached can be applied to individual media and the campaign overall. The 2009 OTRD campaign reached approximately 3.3 million households, with both television and online as the main reach vehicles.

	Target HHs	Awareness %	Aware HHs
Television	5,285,854	49%	2,595,084
Print	5,285,854	15%	798,030
Online	5,285,854	43%	2,246,488
<b>Total</b>	<b>5,285,854</b>	<b>64%</b>	<b>*3,367,089</b>

Ad Effectiveness Study

\*Total aware HHs does not equal the sum of the individual media aware HHs due to media overlap.

*The 2009 campaign reached more households than the 2007 campaign.*

This figure is somewhat higher than the households reached in 2007 (3,305,985), driven by higher campaign awareness and despite fewer traveling households. The decline in traveling households can be explained by the economy and declining interest in leisure travel.

When evaluating the households reached by individual media from year-to-year, we see that print advertising contributed noticeably less this year. Despite slightly more spending on print, the resulting circulation of the buy was in fact 11% lower, explaining the awareness decline in part. The impressive growth in online performance resulted in an overall 2% increase in aware households. While the increase in awareness of the various media didn't increase overall recall, it did increase the overlap in media awareness.

	2007 Aware HHs	2009 Aware HHs	% Change
Television	2,466,115	2,595,084	5%
Print	1,273,179	798,030	-37%
Online	1,786,730	2,246,488	26%
<b>Total</b>	<b>3,305,985</b>	<b>3,367,089</b>	<b>2%</b>

Ad Effectiveness Study

### Campaign Reach not as Efficient as in 2007

The best way to “normalize” this data and provide a helpful means of comparing and contrasting the performance of different media and year-to-year changes is to evaluate the cost to reach one household with the advertising. Overall, the OTRD spent \$0.74 in 2009 to reach a household. Online advertising was the most reach-efficient medium. Print, as is typically the case, is quite cost efficient although generally fails to have broad reach. OTRD spent the most on TV by far, but this medium also reached the most households.

	Aware HHs	Media Cost	Cost per Aware HH 2009
<b>Television</b>	2,595,084	\$1,581,258	\$0.61
<b>Print</b>	798,030	\$218,366	\$0.27
<b>Online</b>	2,246,488	\$522,782	\$0.23
<b>Overall</b>	<b>3,367,089</b>	<b>\$2,503,517</b>	<b>\$0.74</b>

Ad Effectiveness Study

Reach was also slightly less efficient this year for each individual media. The efficiency decline for print was the most sizable – however, this may simply be reflective of the continual change in consumer media habits and the general decline of print.

	2007 Television	2009 Television	2007 Print	2009 Print	2007 Online	2009 Online
<b>Aware HHs</b>	2,466,115	2,595,084	1,273,179	798,030	1,786,730	2,246,488
<b>Media Cost</b>	\$1,304,011	\$1,581,258	\$204,926	\$218,366	\$395,000	\$522,782
<b>Cost per Aware HH</b>	\$0.53	\$0.61	\$0.16	\$0.27	\$0.22	\$0.23

Ad Effectiveness Study

Overall, the 2009 campaign is noticeably less reach-efficient than the 2007 campaign. The loss in efficiency is the result of a similar number of households being reached with higher media spending. Through its research, SMARI has found that \$0.50 to reach an aware household is about average. This indicates that OTRD's costs were relatively high. But ultimately the most important measure will be whether the media was able to influence travel.

	2007	2009
Aware HHs	3,305,985	3,367,089
Media Cost	\$1,903,937	\$2,503,517
Cost per Aware HH	\$0.55	\$0.74

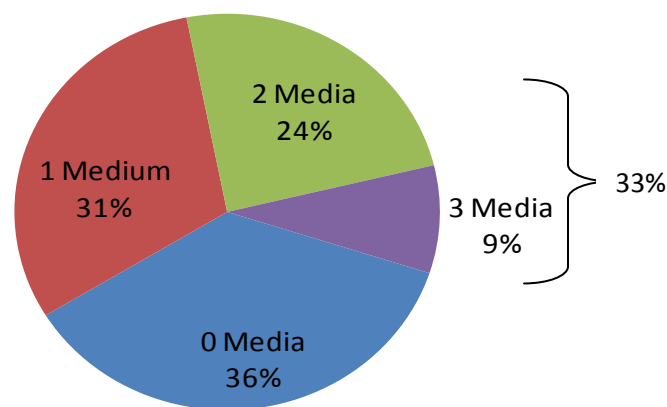
Ad Effectiveness Study

### Media Mix Does not Result in Strong Overlap

A considerable synergy is often created when the target population is exposed to multiple advertising media. Thus, planning which media to use and how to allocate the budget in order to maximize overlap becomes a key tactical decision for future campaigns. To help address this, it is important to understand what percentage of the target audience was exposed to multiple media in the 2009 campaign.

The level of overlap achieved this year is similar to 2007 with 33% indicating they were exposed to multiple campaign media. In 2007, 30% recalled seeing multiple media.

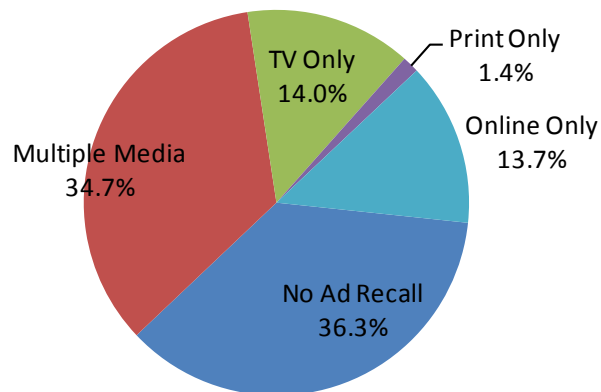
### Media Overlap



Ad Effectiveness Study

Consistent with the awareness results, television and online advertising had similarly strong reach. By contrast, print had almost no unique reach. Those who did see the print ad were also likely to see other ads. The synergy created by media overlap will be explored later in the report in terms of impact on information gathering, state image ratings, and visitation.

### Unique Reach of Media

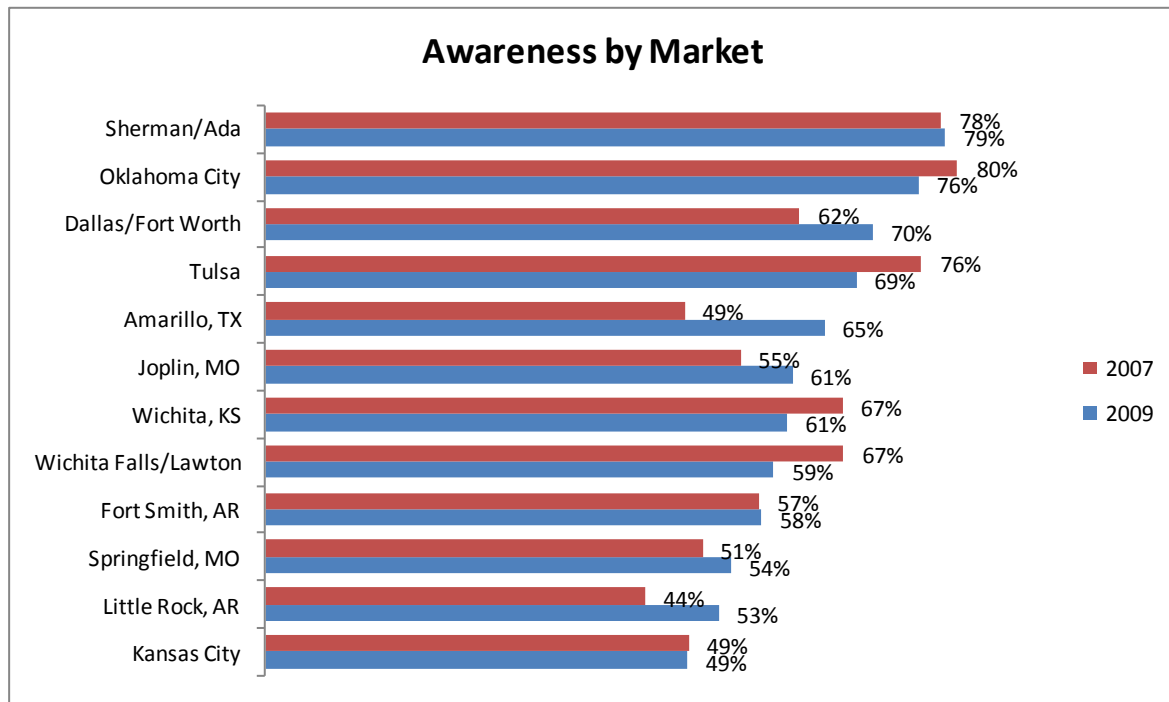


Ad Effectiveness Study

## Recall Varied Noticeably by Market

Of course, these overall measures obscure some of the underlying drivers of these results, including individual DMA performance. The individual markets will be evaluated later in the report in terms of incremental travel, revenue generated and ROI, but first consider awareness achieved and cost to reach a household by market.

Awareness of the 2009 OTRD campaign varied quite a bit by market, ranging from a high of 78% in Sherman/Ada to a low of 49% in Kansas City. Of course, different markets received different levels of spending. Evaluating the cost-per-aware household by market can reveal which markets had the most efficient media buys.



Ad Effectiveness Study

## Television Reach Efficiency Varies by Market

It seems that some media buys were certainly more efficient than others. In general, smaller less expensive markets are by their very nature more “efficient” than larger more expensive markets. For instance, Sherman/Ada generated the highest awareness with relatively low spending. Again the best way to “normalize” the expenditures and awareness levels for each target market is to consider the cost to reach an aware household.

Because only television spending is known for each target market, only television awareness is considered in this analysis. Sherman/Ada certainly did achieve the most efficient reach, along with Wichita Falls. As seen in 2007, Dallas has a relatively high cost to reach an aware household, but as the primary media market the budget is comparatively high.

*Reach efficiency varied by market, but travel generated from each market will ultimately identify where advertising had the greatest impact.*

Target Market	Traveling HHs	TV Awareness	TV Aware HHs	TV Ad Cost	Cost per TV Aware HH
Sherman/Ada	100,660	57%	57,520	\$10,162	\$0.18
Wichita Falls/Lawton	132,622	41%	54,878	\$9,793	\$0.18
Oklahoma City	529,573	57%	303,945	\$84,498	\$0.28
Tulsa	419,431	52%	218,179	\$81,885	\$0.38
Joplin, MO	128,412	49%	63,060	\$28,862	\$0.46
Wichita, KS	377,342	47%	175,464	\$90,559	\$0.52
Amarillo, TX	158,662	52%	82,198	\$43,334	\$0.53
Kansas City	718,474	37%	268,474	\$167,943	\$0.63
Little Rock, AR	436,980	40%	172,892	\$115,700	\$0.67
Springfield, MO	314,833	42%	131,790	\$97,094	\$0.74
Dallas/Fort Worth	1,759,793	55%	973,099	\$774,285	\$0.80
Fort Smith, AR	209,072	45%	93,305	\$77,143	\$0.83

### Ad Effectiveness Study

The cost to reach an aware household went up in every market, in some cases due to increased expenditures. While in some cases the cost-per-aware household increase was quite small, in others the cost rose significantly. Of course, these markets must also be assessed in terms of visitation generated to identify where the advertising had the greatest impact, which will be evaluated later in the report – and may justify the higher cost-per-aware household in some cases. First consider the effectiveness of the ads in terms of communicating key messages, influencing information gathering, and building a positive image of the state.

### Ad Effectiveness Study

	2007 Cost per Aware	2009 Cost per Aware	Increase
Fort Smith	\$0.35	\$0.83	\$0.48
Springfield	\$0.29	\$0.74	\$0.45
Little Rock	\$0.29	\$0.67	\$0.38
Wichita	\$0.18	\$0.52	\$0.34
Joplin	\$0.22	\$0.46	\$0.24
Amarillo	\$0.30	\$0.53	\$0.23
Dallas	\$0.62	\$0.80	\$0.18
KC	\$0.45	\$0.63	\$0.18
Tulsa	\$0.28	\$0.38	\$0.10
OK City	\$0.23	\$0.28	\$0.05
Sherman	\$0.13	\$0.18	\$0.05
Wichita Falls	\$0.17	\$0.18	\$0.01

# Evaluation of Marketing Tools

While exposure to the advertising is an essential measure of advertising effectiveness, awareness alone is not sufficient. The campaign must also deliver a meaningful and persuasive message that differentiates the state while communicating its benefits as a travel destination. If the message is not strong, then it is not likely to have the desired impact – and incremental travel might not occur. Therefore, this research also evaluates consumers’ reactions to the creative elements to ensure that they are meaningful and persuasive.

Before reviewing the 2009 creative ratings and comparing the results to those from the 2007 campaign, a comparison of creative executions from both years provides helpful context. Year-to-year the television ads are visually similar and use the same background music. The “Okla...Magic, Soul, Swagger, etc.” theme is also used in both television campaigns. The major difference is that the 2007 ads promoted the Oklahoma Centennial, touted as the “number one U.S. event,” while the 2009 ads include the value message “More costs less” – a message that seems well-positioned given the economic climate. The print ads tested, however, are quite different from year-to-year in terms of visuals and messages. The 2007 ads used the “Okla Glory” catchphrase and show mostly urban imagery. The main message of the ads is the Centennial celebration. The main visual in the 2009 print ad is a picture of Oklahoma’s natural beauty. The ad promotes culture, landscapes, and history as well as Oklahoma’s rating as “one of the nation’s best vacation values” – again, seemingly well-positioned. The ad also contains an offer for a free Red Carpet Country visitor’s guide and a message promoting Tulsa as a summer escape.

*The value message used in 2009 seems well-positioned given the economic climate*

After viewing the 2009 Oklahoma ads, respondents rated the campaign on a 5-point scale on two groups of attributes:

- 1) **Communication Attributes**, which focus on key messages. Through testing hundreds of destination ads, SMARI finds that a rating of 4.0 or higher on communication attributes indicates excellence. The goal is 3.75 or better, though 3.5 or better is good. A score below 3.0 indicates notable weakness.
- 2) **Impact Attributes**, which focus on the ability of the message to generate greater interest in visiting the destination. SMARI has found that it is harder to influence behavior than it is to influence perceptions, so the goal for impact attributes is 3.5.

Communication Attributes	
4.0	<b>Considered Excellent.</b> Rating is in the top 10% of all communication ratings.
3.75	<b>Goal Rating.</b> Resides in the top 25% of all communication ratings
3.5	<b>Considered Good.</b> Rating is average compared to historic norms.
3.0	<b>Notable Weakness.</b> Rating is in the bottom 15% of all communication ratings.
Impact Attributes	
3.7	<b>Considered Excellent.</b> Rating is in the top 10% of all impact ratings.
3.5	<b>Goal Rating.</b> Resides in the top 25% of all impact ratings
3.3	<b>Considered Good.</b> Rating is average compared to historic norms.
3.0	<b>Notable Weakness.</b> Rating is in the bottom 15% of all impact ratings.

## Does the Advertising Communicate Effectively?

As shown below, the 2009 OTRD campaign effectively communicates intended messages, especially *a lot of different things to do*. The only attribute that falls short of the goal rating (and had the largest rating decline) is *show unexpected attractions or activities*. The decline for this attribute could be due to airing similar ads in the same target markets from year-to-year – and thus the imagery is no longer “unexpected” by the viewers.

Communication Attributes	2007	2009
Make it look like there are a lot of different things to do there	4.1	4.0
Make it seem like an appealing destination to visit	4.1	3.9
Show unexpected attractions or activities	4.0	3.7

### Ad Effectiveness Study

The story is similar for impact ratings. While goal ratings were achieved across the board, all ratings also declined from 2007 levels. The 2007 ads might have received higher communication and persuasion ratings because they promoted the Oklahoma Centennial, touted as the “number one U.S. event.” However, the lower ratings could also be the result of a less receptive audience due to the decline of travel propensity overall. But overall, despite lower ratings than the 2007 campaign, the 2009 ads seem to be effective at communicating key messages and generating interest in visitation.

*The 2009 OTRD campaign is effective at communicating key messages and generating interest in visitation.*

Impact Attributes	2007	2009
Make you want to find out more about traveling to or within Oklahoma	3.9	3.6
Make you want to visit Oklahoma for a leisure trip	3.8	3.6
Make you want to visit the web site or call for more information	3.6	3.5

### Ad Effectiveness Study

Given OTRD is targeting several markets (some more distant than others), the persuasive power of the ads from this evaluative perspective should be reviewed by proximity. The simplest cut (in-state vs. out-of-state) reveals that the ads do receive lower impact ratings from the more distant markets. This suggests that it will be harder to influence visitation from these markets, which will be evaluated in the Market Analysis section of the report.

	Out-of-State	In-State	Difference
Make you want to visit the web site or call for more information	3.4	3.8	0.4
Make you want to visit Oklahoma for a leisure trip	3.5	3.9	0.4
Make you want to find out more about traveling to or within Oklahoma	3.6	3.9	0.3

### Ad Effectiveness Study

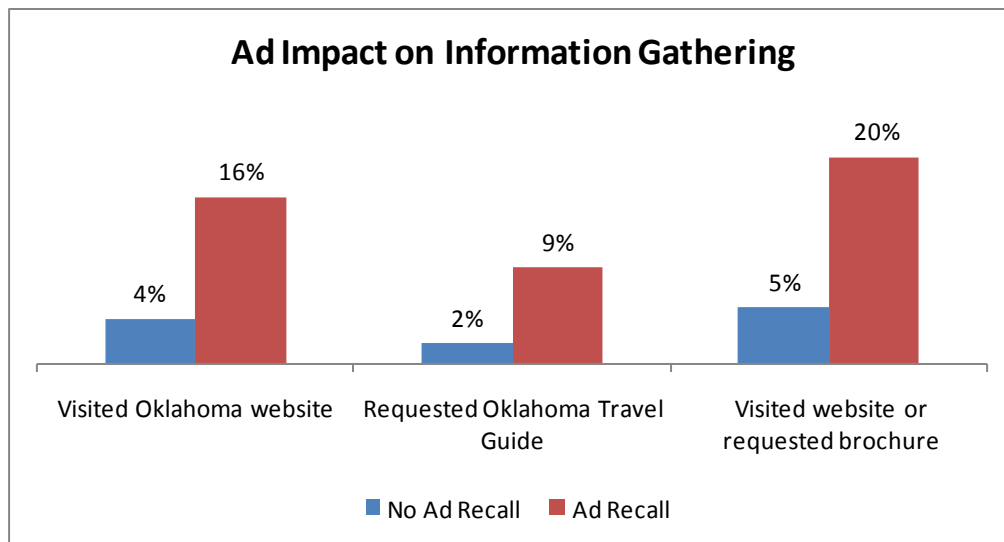


## Does the Advertising Drive People to Gather More Information?

It is also important for advertising to influence potential visitors to gather information on the website or to request the Oklahoma Travel Guide, both of which contain more comprehensive information that can potentially increase trip duration or influence additional activities and trip expenditures.

Exposure to the Oklahoma campaign did have a positive impact on both website visitation and travel guide requests. The stronger impact is on website visitation, which is where most people turn for information these days. In fact, the impact on website visitation was stronger this year than in 2007 (10% increment in 2007 vs. 12% increment in 2009), while the impact on brochure requests declined (8% vs. 7%). Overall, those who saw any of the Oklahoma ads were four times as likely to gather any information via the website or brochure.

*The advertising had a positive impact on website visitation and brochure requests.*



Ad Effectiveness Study

Highlighting the importance of the advertising driving website visits and travel guide requests is the influence that these two marketing tools have on Oklahoma visits. In fact, when evaluating the mean scores of the potential visitation influencers from the conversion study, we see that the website and travel guide were the most powerful.

Potential Visitation Influencers	Mean Rating (10 point scale)
The Oklahoma website	6.8
The travel guide	6.7
Your past experience	6.2
The advertising you saw	5.6
An interest in Native American history	5.2
The recommendations of friend or family	4.8

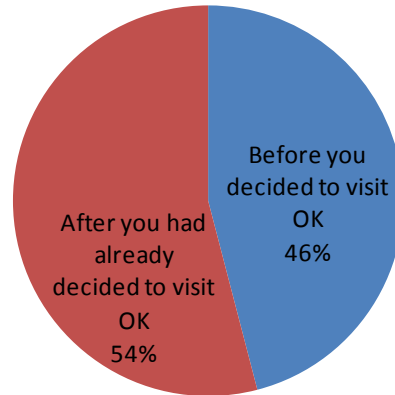
Conversion Study

## What is the Role of the Website?

Understanding when people visit the website and what they use it for can help the OTRD to optimize the content and browsing experience for potential visitors. There is nearly an equal split between people who visit the website prior to deciding to visit (info seeking) and people who visit the site after they have already decided to visit (planning). Thus the website should provide content that will influence potential visitors as well as content designed to help those who have already chosen to visit Oklahoma to plan their trip.

Those who visited the website were asked which specific features they used. Encouragingly, most features are used by at least half of website visitors – and almost all visitors find the information very or somewhat useful. The most used content seems to be *things to do or attractions*, followed by the *events calendar*. This highlights the importance of continuing to keep this content up-to-date. It is interesting that *discounts or special offers* is among the least utilized content given the current economic situation. It might make sense to make this content more prominent on the site or develop even stronger offers during times of economic turmoil.

## Visited Oklahoma Website...



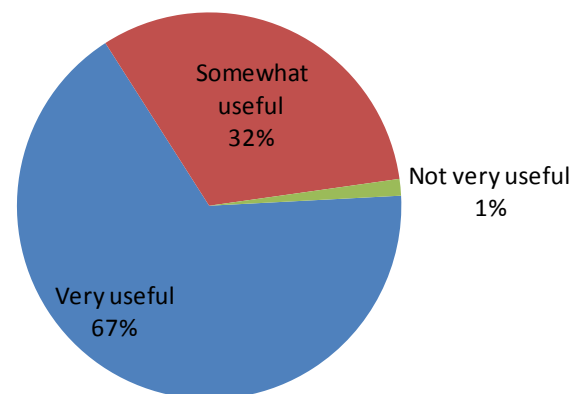
Ad Effectiveness Study

*The website should influence visitation and help people plan trips.*

Website Features	% Who Used Feature
Things to do or attractions	79%
Events calendar	60%
Places to eat or restaurants	53%
Places to stay	52%
Maps or directions	50%
Discounts or special offers	44%
Itineraries or trip suggestions	21%
None of these	2%

Ad Effectiveness Study

## Information on the Website was...



Conversion Study

## Does the Advertising have a Positive Impact on Oklahoma’s Image?

Strong advertising will also have a positive impact on potential visitors’ image of the destination. While the ultimate goal of the advertising is to influence travel, this often takes time. A requisite step is building a positive image of the destination. Ad impact on Oklahoma’s image can be tested by comparing the image ratings given by those aware of the advertising to the ratings given by those not aware of the advertising. The ratings given by those unaware of the ads represent the baseline perceptions of the state, and differences in ratings among those aware of the ads highlight where the ads have a strong impact.

*The advertising also has a positive impact on key image attributes.*

It turns out that the advertising has a decidedly positive impact on all of the favorable attributes – and a similarly well-defined negative impact on the unfavorable attributes. It is encouraging that some of the strongest impacts are on the key messages of the ads, including *plenty to see and do* and *value* – two ubiquitous messages in this year’s television advertisements.

	Attribute	No Ad Recall	Ad Recall	Difference
Favorable Attributes	Is an appealing destination to visit	3.18	3.50	0.32
	Is great for the family	3.54	3.84	0.31
	Has lots of lakes and shorelines	3.19	3.49	0.30
	Has natural beauty	3.69	3.98	0.29
	Offers many opportunities for outdoor activities	3.67	3.95	0.29
	Has plenty to do and see	3.28	3.56	0.28
	Has lots of historical sites	3.54	3.82	0.28
	Is a good value	3.50	3.78	0.28
	Is interesting	3.31	3.57	0.27
	Is a good place to experience Native American or Western culture	4.04	4.30	0.26
	Is exciting	2.97	3.22	0.25
	Has hidden treasures	3.31	3.55	0.24
	Has a clean and unspoiled environment	3.31	3.55	0.24
	Is restful/relaxing	3.47	3.70	0.24
	Has unique events	3.31	3.55	0.23
	Has lots of casinos	3.56	3.77	0.21
	Has lots of entertainment & nightlife	2.97	3.19	0.21
	Has lots of shopping	3.13	3.33	0.20
	Is cool/hip	2.68	2.86	0.18
	Is progressive	2.99	3.14	0.16
Is modern	3.07	3.22	0.16	
Is urban	2.85	2.97	0.12	
Unfavorable Attributes	Is too conservative	2.61	2.57	-.04**
	Is dry and dusty	2.79	2.70	-0.10
	Is not welcoming to everyone	2.29	2.17	-0.13
	Has flat and uninteresting scenery	2.64	2.48	-0.16
	Has little to do	2.61	2.39	-0.22
	Doesn't seem like a place to take a vacation	2.68	2.42	-0.26

Ad Effectiveness Study

\*\*Difference is NOT statistically significant at 95% confidence

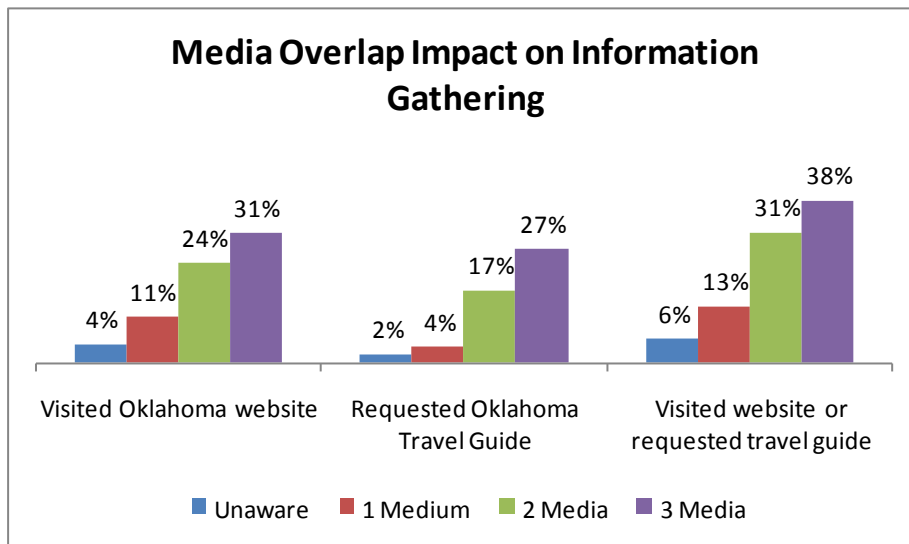
# Media Overlap Impact

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## Is a Synergy Created from Exposure to Multiple Media?

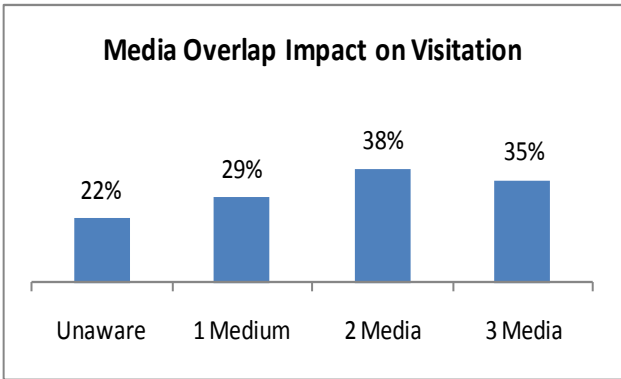
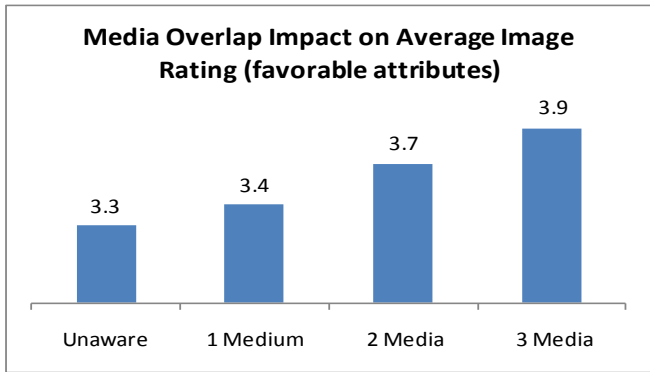
Awareness of the advertising clearly has a positive impact on information gathering and the state's image as a leisure destination. As previously mentioned, a notable synergy is often created when consumers are exposed to multiple media. As such, we would expect that those aware of multiple media would be more likely to gather information, give the state higher ratings, and ultimately be more likely to visit.

First consider the impact of media overlap on information gathering. It is quite clear that those exposed to multiple media are more likely to gather information about Oklahoma – and the impact is quite dramatic for those who saw all three media.



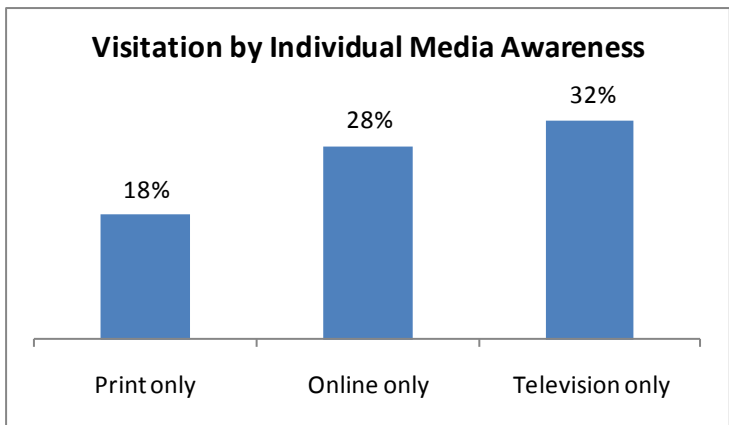
In a similar fashion, media overlap also has a notable impact on Oklahoma’s average image rating. And ultimately, we see that those who saw multiple media were more likely to visit the state. Exposing potential travelers to multiple media is clearly desirable, and it was previously revealed that 33% of respondents were actually exposed to multiple media and only 9% saw all three. Planning media mix and placement in a way that will create overlap while not diluting individual media will clearly be an important tactical consideration for future campaigns.

*Exposure to multiple media creates a notable synergy.*



Ad Effectiveness Study

Individual media impact on visitation should also be considered. It turns out that those aware of only television advertising and only online ads were much more likely to visit Oklahoma than those who were aware of only print advertising. It would appear that television and online advertising provides the level of information, visual imagery, and emotional appeal that motivates travel to the State.



Ad Effectiveness Study

# Incremental Travel

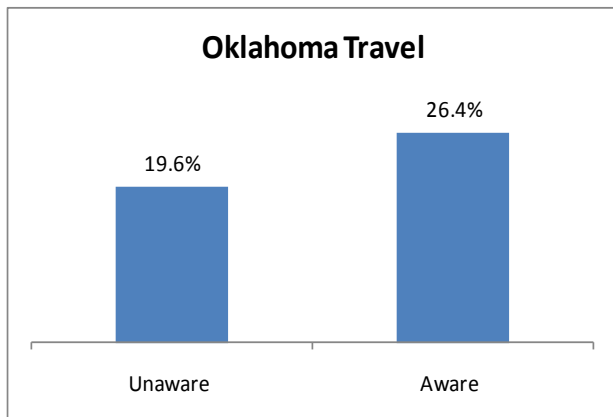
There are many steps in the travel decision-making process that can be influenced by advertising. The ability of the OTRD target market campaign to spur consumers to seek information about Oklahoma and to positively influence the State’s image were previously reviewed. However, the ultimate goal of the advertising is to attract travel to Oklahoma that would not have otherwise occurred.

First consider the impact in the target markets, which is measured by the ad effectiveness research. SMARI’s methodology for calculating the impact of a marketing campaign relies on *incremental travel*, which is defined as follows: The rate of travel by those who are unaware is considered the base rate of travel, which would have been achieved regardless of any marketing efforts. Any travel above this base by aware households is considered influenced – or the rate of *incremental travel*. Also, it is important to note that only travel that occurred after the advertising had run was counted as having been influenced.

**After the 2009 Oklahoma advertising campaign began, the level of visitation by those with advertising recall was higher than for those unaware of the campaign – 26.4% compared to 19.6%.** This suggests that the campaign generated trips that would not have occurred without the advertising. The incremental travel percentage of 6.8% is much stronger than the 3.5% realized in 2007. Perhaps the value message used this year, coupled with the strong television reach, helped to influence travel despite the struggling economy.

**The stronger incremental travel rate resulted in more than 225,000 incremental trips– significantly more than the 117,000 trips generated in 2007.**

*Perhaps the value message used this year and strong television reach helped to generate stronger incremental travel despite the economic conditions.*



Ad Effectiveness Study

	2007	2009
Aware HHs	3,305,985	3,367,089
Incremental Travel %	3.5%	6.8%
<b>Incremental Trips</b>	<b>116,614</b>	<b>228,962</b>

# Trip Expenditures

A key component of the return on investment calculation is visitor expenditures. We not only need to know how many trips the ads generated, but we also need to know how much those visitors spent while in Oklahoma. Thus, respondents were asked to estimate their travel party's total spending in several categories. The categories are then summed to arrive at total trip expenditures.

It would make sense for spending patterns to reflect overall travel patterns, so with the current economic climate and declines in leisure travel, we would expect visitor expenditures to decline. In fact, when asked about changes in travel behavior, nearly one-third of respondents said that they spent less on their trips than they normally would. However, visitors from the target markets actually spent slightly more on average this year. This may be due to people replacing longer, more expensive trips with those closer to home. They would have spent much more on a longer trip and instead their expenditures on the shorter trip are slightly higher – but their overall travel expenditures for the year are lower.

Trip Expenditures - Target Market Overnight Trips			
	2007	2009	Difference
Lodging	\$94	\$107	\$13
Meals/Food/Groceries	\$103	\$100	-\$3
Entertainment	\$42	\$58	\$16
Shopping/souvenirs	\$66	\$56	-\$10
Transportation	\$80	\$79	-\$1
Attractions	\$23	\$26	\$3
Other	\$24	\$23	-\$1
<b>Total</b>	<b>\$432</b>	<b>\$450</b>	<b>\$18</b>

Ad Effectiveness Study

Non-target market visitors also spent more on average this year than in 2007 – driven mostly by increased shopping and transportation spending. While some visitors did likely spend less, it seems that enough visitors actually spent more to result in higher average trip expenditures.

Trip Expenditures - Non-Target Market Overnight Trips			
	2007	2009	Difference
Lodging	\$197	\$210	\$13
Meals/Food/Groceries	\$165	\$162	-\$3
Attractions	\$92	\$45	-\$47
Recreational expenses	\$86	\$6	-\$80
Souvenirs	\$79	\$41	-\$38
Shopping	\$54	\$184	\$130
Entertainment	\$13	\$14	\$1
Auto rental or flight costs	\$25	\$141	\$116
Other	\$52	\$27	-\$25
<b>Total</b>	<b>\$753</b>	<b>\$831</b>	<b>\$78</b>

Conversion Study

# Target Market Economic Impact & ROI

The 2009 OTRD campaign generated 6.8% incremental travel, which translates to more than 225,000 trips to Oklahoma from the target markets that were influenced by the advertising – nearly twice the numbers as in 2007. To determine the economic impact, or travel revenue generated by the campaign, the number of incremental trips is multiplied by the average trip expenditures. The 2009 OTRD target market campaign was responsible for an additional \$103 million of travel spending in the state – again, noticeably higher than the revenue generated from the target markets in 2007. As noted earlier, in uncertain economic times advertising can help influence the decision to travel.

	2007	2009
Aware HHs	3,305,985	3,367,089
Incremental Travel %	3.5%	6.8%
Incremental Trips	116,614	228,962
Average Trip Expenditures	\$434	\$450
<b>Economic Impact</b>	<b>\$50,610,476</b>	<b>\$103,018,492</b>

Ad Effectiveness Study

*More travel revenue was generated from the target markets in 2009 due to stronger incremental travel and higher visitor expenditures.*

Return on investment is calculated simply by dividing the travel revenue generated by the 2009 OTRD campaign by the overall media expenditures. It turns out that the advertising efforts in the target markets returned \$41 for each \$1 in media spending – **higher than the 2007 ROI despite increased media expenditures this year.**

	2007	2009
Economic Impact	\$50,610,476	<b>\$103,018,492</b>
Media Expenditures	\$2,113,745	\$2,503,513
<b>Return on Investment</b>	<b>\$24</b>	<b>\$41</b>

Ad Effectiveness Study



# Combined Economic Impact & ROI

The ad effectiveness methodology measures the impact of OTRD’s marketing efforts in the target markets only. However, there are people outside of the target markets who requested the Oklahoma travel guides and subsequently visited. These influenced trips are accounted for in the conversion methodology. The results of the two methodologies can be combined by utilizing the ad effectiveness results for the target markets and the conversion results for the non-targeted markets, which will reveal the total number of trips influenced by OTRD’s marketing efforts.

The conversion methodology revealed that the Oklahoma travel guide influenced 105,598 total trips. However, if this number is simply added to the incremental trips from the ad effectiveness methodology some visitors will be double-counted. The influenced trips generated by responses *outside of the target markets* represent the additional influenced trips, which can be added to the incremental trips. In total, the 2009 OTRD efforts influenced 283,274 trips, with the target markets generating about four times the trips than the non-target markets.

*Incremental trips from target markets	228,962
**Trips influenced outside of the target markets	54,312
<b>Total influenced trips</b>	<b>283,274</b>

\*Ad Effectiveness

\*\*Conversion Study

The total travel revenue generated when combining the results from the target and non-target markets exceeds \$148 million. The non-target market visitors spent more on average because they were coming from farther away and staying longer, but the target markets still generated two times more revenue.

	*Target Markets	**Non-Target Markets	Total
Influenced Trips	228,962	54,312	283,274
Avg. Trip Expenditures	\$450	\$831	\$530
Economic Impact	\$103,018,492	\$45,133,539	\$148,152,031

\*Ad Effectiveness Study

\*\*Conversion Study

When the media expenditures are compared to the total travel revenue generated, we see that the **2009 OTRD campaign returned \$59 for every \$1 in media spending. This is a significant increase over the \$33 ROI realized in 2007, when the same combined methodology was used.**

	2004*	2007	2009
Economic Impact	\$25,885,836	\$68,787,143	\$148,152,031
Media Expenditures	\$2,104,803	\$2,113,745	\$2,503,513
<b>ROI</b>	<b>\$12</b>	<b>\$33</b>	<b>\$59</b>

*Overall ROI increased in 2009.*

\*The 2004 results are based on the conversion study results only

The table to the right shows every measure included in the ROI assessment. Comparing each measure from year-to-year helps explain overall performance change.

Awareness was higher this year (reflecting higher media spending). Additionally, incremental travel was much stronger this year. While the audience was smaller (due to fewer traveling households), the advertising had a stronger impact on visitation – perhaps in part due to the value message in the ads and the stronger unique reach of the more impactful television media. In a similar way, the non-target markets produced fewer responses, but the net conversion rate was higher this year, which led to more influenced trips.

	2004*	2007	2009
Aware HHs		3,305,985	3,367,089
Incremental Travel %		3.5%	6.8%
Incremental Trips (target markets)		116,614	228,962

from conversion study:

Non-target market responses		435,467	368,844
Net Conversion %		5.5%	14.7%
Non-Target market influenced trips		24,139	54,312

Total influenced trips	40,701	140,753	283,274
Avg. Trip Expenditures	\$636	\$489	\$530
Economic Impact	\$25,885,836	\$68,787,143	\$148,152,031
Media Expenditures	\$2,104,803	\$2,113,745	\$2,503,513
<b>ROI</b>	<b>\$12</b>	<b>\$33</b>	<b>\$59</b>

Average overall trip expenditures were actually higher this year, likely due to more non-target market visitors who come from farther away, stay longer, and spend more. A higher quantity of influenced trips and higher average trip expenditures, of course, led to more travel revenue generated, or a stronger economic impact. The increase in economic impact was more than enough to make up for the increase in media expenditures, and ROI was significantly higher in 2009.

# Visitors

## Who Visits?

Important to the interpretation of the overall results of this study as well as future marketing approaches is an understanding of who visited Oklahoma and why they came. These specifics can help OTRD to better understand its targets and develop messages that are meaningful and persuasive to potential future visitors.

Visitor demographic data from the advertising effectiveness and conversion studies was combined to allow an evaluation of overall Oklahoma visitors (target market & non-target market). First, these overall results will be reviewed, and then any key differences between the target market visitors and non-target market visitors will be highlighted.

First, consider the demographic profile of overall Oklahoma visitors compared to non-visitors. Oklahoma visitors tend to be younger, are more likely to be married with children at home, and are more educated and more affluent than non-visitors. This demographic information should be considered when developing future creative materials and placing media.

	Non-Visitor	Overnight Visitor
<b>Age</b>	56	53
<b>Married</b>	72%	82%
<b>Children at home</b>	21%	25%
<b>College or more</b>	47%	56%
<b>\$75K or more</b>	27%	49%

Combined Results

Among Oklahoma visitors there are some notable differences between the target markets and non-target markets. Non-target market visitors tend to be older, more affluent, and less likely to have children at home than the target market visitors. While interesting, these differences are not particularly surprising. It would make sense

	*Target Market Visitors	**Non-Target Market Visitors
<b>Age</b>	46	55
<b>Married</b>	70%	77%
<b>Children at home</b>	46%	21%
<b>College or more</b>	44%	52%
<b>\$75K or more</b>	27%	33%

that the non-target market visitors who are coming from farther away would be older, more affluent, and less tied-down at home. It also makes sense that the target market visitors who come from nearby would be younger and slightly less affluent. OTRD might consider taking advantage of these differences when developing the target market advertising campaign and the travel guide. A closer review of trip specifics will help to clarify the differences between the target market and non-target market visitors.

\*Ad Effectiveness Study

\*\*Conversion Study

*Non-target market visitors are older and more affluent.*

# Trip Specifics

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Having considered the demographic profile of Oklahoma visitors, the next step is to review their trip specifics. Information concerning visitors' planning behaviors, length of stay, and trip activities can be leveraged to create optimal media placement strategy and messages that are compelling and meaningful to potential visitors.

Like the visitor demographics review, trip specifics data were combined from the advertising effectiveness and conversion studies to allow an evaluation of overall Oklahoma travel behaviors. First the overall results will be reviewed, and then any key differences between target markets and non-target market visitors will be highlighted. As with visitor demographics, we would expect to see some travel behavior differences between the nearby target markets and more distant non-target markets.

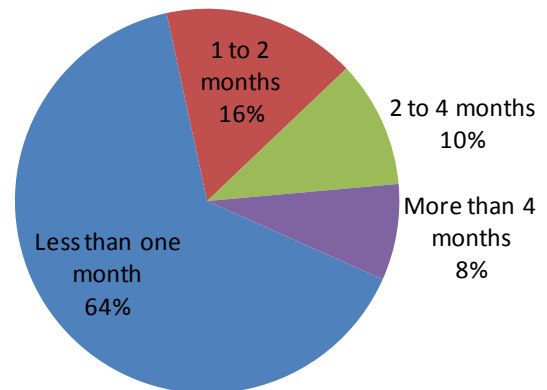
## Planning Process

Overall it seems that the travel planning process is fairly short, with about two-thirds of Oklahoma visitors planning their trip less than one month in advance. Additionally, only a small percentage of visitors took more than four months to plan.

Visitors were asked during which 2009 month they traveled to Oklahoma. It should be noted that interviewing took place in late September and early October, so travel during October through December 2009 is not represented. That said, spring and summer appear to be the most popular seasons to visit Oklahoma.

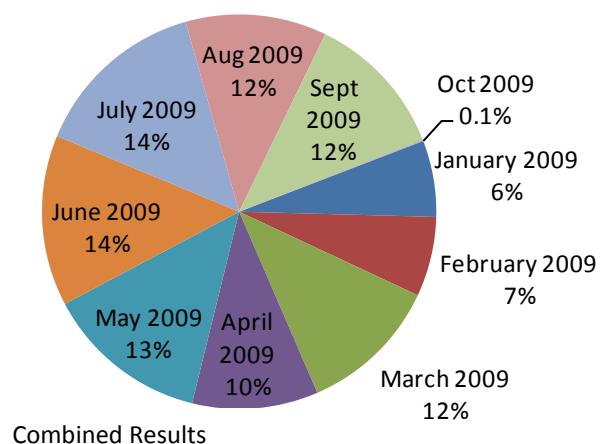
Given the short trip planning duration and seasonal visitation patterns, it would make sense to reach potential travelers from early spring to late summer. The current strategy of airing television ads during spring and early summer makes sense, although OTRD might consider extending the campaign into July and August.

## Duration of Trip Planning



Combined Results

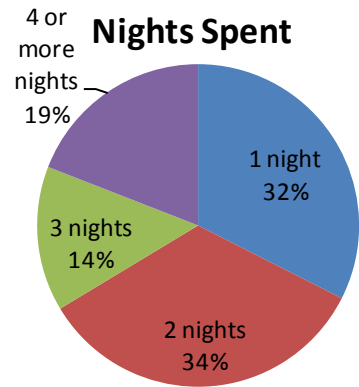
## Month of Oklahoma Trip



Combined Results

Visitors spent an average of 2.6 nights in Oklahoma, suggesting many trips could be weekend getaways. In fact, when evaluating the distribution of nights spent in Oklahoma, it appears that two-thirds of visitors stay for one or two nights. Perhaps Oklahoma could be marketed as a place for a weekend getaway, especially to the surrounding target markets.

Avg. # of nights spent in Oklahoma	2.6
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Combined Results

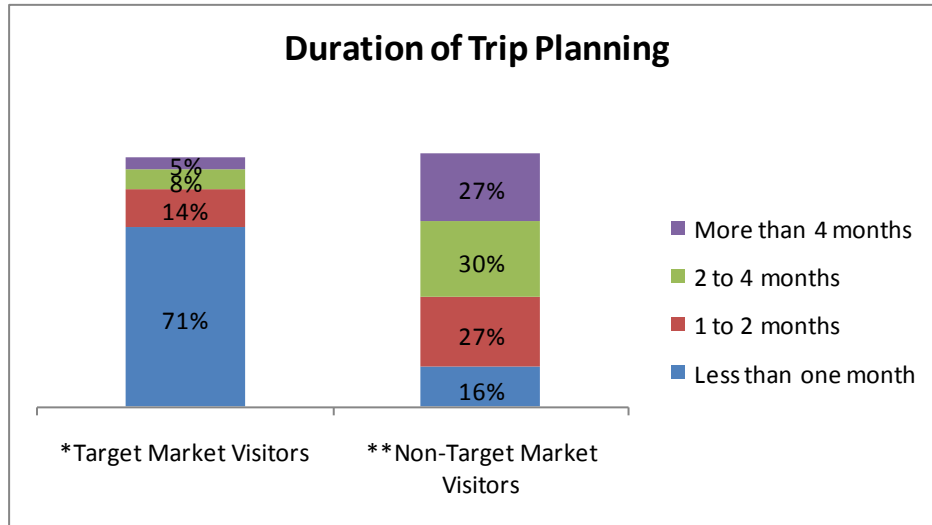
### Which Activities Motivate Visitation?

The trip activity that the most visitors participated in was *restaurants or active nightlife*. However, people are always going to dine out while on vacation. To get a sense of which activities and attractions *motivated* people to visit, respondents were also asked which activities they planned ahead. The percentage of visitors who participated in an activity can be combined with the percentage who planned the activity ahead to arrive at a “net” activity score. From this perspective, the most popular activities that also motivated trips were *scenic drives, gambling, restaurants, historic sites* and *national parks*. OTRD should continue to leverage activities and attractions that motivate visitation in advertising efforts.

Combined Results

Activity/Attraction	Participate	Planned Ahead	Net
Scenic drives or scenic areas	35%	55%	19%
Gambling	26%	71%	19%
Restaurants or active nightlife	41%	44%	18%
Historic sites or landmarks	25%	62%	16%
State or national parks and recreation areas	21%	74%	15%
Shopping	29%	46%	13%
Attractions such as museums	19%	67%	12%
Water activities	15%	83%	12%
Camping or RVing	12%	95%	11%
Attractions like zoos, theme parks, etc.	14%	79%	11%
Route 66	17%	62%	11%
Quaint attractions or small towns	22%	48%	10%
Native American events or attractions	14%	68%	9%
Attended festivals or fairs	11%	67%	7%
Arts or cultural events	10%	55%	5%
Go to a concert, theatre, ballet, or other performance	7%	79%	5%
Watching sporting events	6%	81%	5%
Participate in sporting events or tournaments	4%	88%	3%
Other ethnic events or attractions	5%	60%	3%

As anticipated, some travel behaviors are quite different between target market and non-target market visitors. For instance, those from the non-target markets take noticeably longer to plan their trips. In a related way, they also stay longer in Oklahoma and participate in more activities. Understanding *which* activities are popular among the two visitor groups can help OTRD to tailor marketing efforts accordingly.



\*Ad Effectiveness Study

\*\*Conversion Study

	*Target Market Visitors	**Non-Target Market Visitors
Nights spent	2.3	3.7
Number of activities	3.2	4.2

\*Ad Effectiveness Study

\*\*Conversion Study

The following table shows the specific trip activities of the target market and non-target market visitors. Clearly the non-target visitors are more likely to participate in many of the “touristy” activities, which makes sense given they are coming from farther away. This could also be a function of what is promoted in the travel guide.

It is interesting to note that the ad effectiveness respondents are more likely to gamble while in Oklahoma – and that gambling was actually the third-most popular activity among this group. It seems that many people from the close target markets take short trips to Oklahoma to gamble. This is something OTRD could possibly leverage in future promotions.

Activity/Attraction	*Target Market Visitors	**Non-Target Market Visitors	Difference
Historic sites or landmarks	21%	55%	34%
Attractions such as museums	15%	42%	28%
Route 66	14%	40%	26%
Scenic drives or scenic areas	33%	47%	14%
Quaint attractions or small towns	19%	33%	14%
Native American events or attractions	12%	25%	13%
Arts or cultural events	8%	16%	7%
State or national parks and recreation areas	20%	25%	6%
Camping or RVing	12%	15%	3%
Shopping such as at a mall, antique shop, etc.	29%	32%	3%
Restaurants or active nightlife	41%	42%	1%
Other ethnic events or attractions	6%	5%	-1%
Participate in sporting events or tournaments	4%	2%	-2%
Watch sporting events	6%	4%	-2%
Attended Festivals or fairs	11%	7%	-4%
Go to a concert, theatre, ballet or other performance	7%	2%	-5%
Attractions like zoos, theme parks, etc.	15%	7%	-8%
Water activities such as boating, swimming or fishing	16%	7%	-8%
Gambling	29%	12%	-17%

\*Ad Effectiveness Study

\*\*Conversion Study

## Does the Advertising Impact Visitor Behaviors?

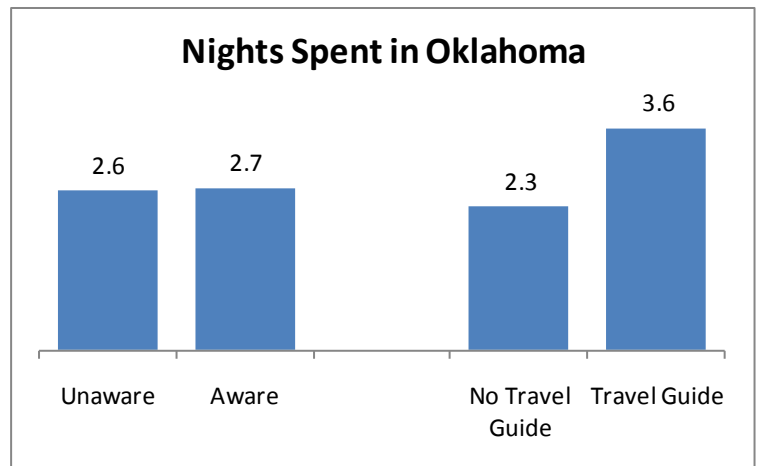
It was previously established that the advertising generated incremental travel and visitor expenditures, which led to a positive return on investment. It is also interesting to observe the impact that the ads and the travel guide had on visitors' behavior. Ideally the advertising would encourage visitors to do more, stay longer, and spend more.

It appears that **the advertising and travel guide did encourage visitors to stay longer and participate in more activities on average.** The travel guide had an especially strong impact on number of activities.

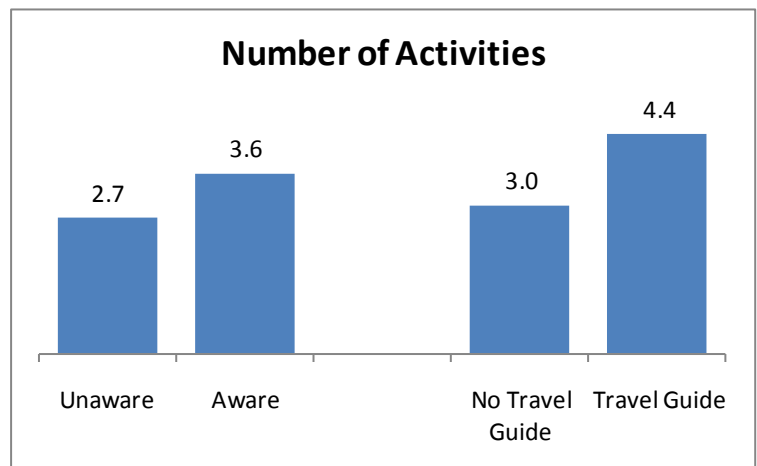
As expected, those who do more and stay longer also tended to spend more. So it turns out that advertising not only influenced visitation, but it also encouraged visitors to stay longer and do more stuff – which means more travel revenue for the state.

	Unaware	Aware
Lodging	\$74	\$108
Food	\$75	\$110
Entertainment	\$33	\$57
Shopping	\$52	\$63
Transportation	\$57	\$91
Attractions	\$29	\$26
Other	\$12	\$19
<b>TOTAL</b>	<b>\$332</b>	<b>\$475</b>

Ad Effectiveness Study



Combined Results



Combined Results



# Market Analysis

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A key element of the marketing plan for OTRD is the focus on 12 targeted markets. For OTRD, understanding the level of success in each market can provide useful insight into future marketing efforts, and therefore the following is a review of the performance by market. This year the conversion data was not collected to allow for analysis by market, so this review utilizes only the findings from the advertising effectiveness research. Additionally, for the ROI by market, the analysis only uses the media expenditures from television, which represent the market specific expenditures. The goal is to highlight where the OTRD efforts are most effective, and to provide information that can help refine future marketing efforts.

## How did performance differ by market?

The performance of the 12 markets varies significantly, and it is helpful to first review several issues in overview, before turning to a detailed consideration of each market. The ROI by market ranges from a return of \$399 for each \$1 spent in Wichita Falls/Lawton, to no return in Tulsa or Sherman/Ada. Overall, when just the market specific measures are considered, the overall ROI is \$65 (considering just the television expenditures). Among the 12 markets included, six performed above this average, four provided a lower return, and two generated no return on investment.

Market	Direct Spending	Media Expenditures	ROI
Wichita Falls, TX, or Lawton, OK	\$3,908,273	\$9,793	\$399
Amarillo, TX	\$4,968,462	\$43,334	\$115
Wichita, KS	\$9,285,654	\$90,559	\$103
Oklahoma City	\$7,771,248	\$84,498	\$92
Dallas/Fort Worth	\$61,093,431	\$774,285	\$79
Joplin, MO	\$2,059,163	\$28,862	\$71
Little Rock, AR	\$5,149,932	\$115,700	\$45
Kansas City	\$4,472,166	\$167,943	\$27
Fort Smith, AR	\$1,917,261	\$77,143.00	\$25
Springfield, MO	\$2,392,903	\$97,094	\$25
Sherman/Ada TX/OK	\$0	\$10,162	\$0
Tulsa	\$0	\$81,885	\$0
<b>TOTAL</b>	<b>\$103,018,492</b>	<b>\$1,581,258</b>	<b>\$65</b>

This calculation uses only the television media expenditures to calculate the ROI, as they are the only expenditures that are market specific

The following chart shows the markets sorted by ROI, and the two markets with the highest ROI only accounted for 9% of the incremental trips. Since these are small markets, strong performance is not as meaningful. In fact, the next three markets ranked by ROI (Dallas/Fort Worth, Wichita, and Oklahoma City) generated almost three-quarters of all incremental trips. Plus two of the markets with below-average ROI (Little Rock and Kansas City) generated as much direct spending as the two highest ROI markets. This suggests that while ROI is an important overall measure, it should not be the sole consideration for evaluating individual markets. Rather, the total direct spending, ROI, and potential for the market seem to be valid points of consideration to be used.

Market	ROI	Direct Spending	Incremental Trips	% of all Incremental Trips
Wichita Falls, TX or Lawton, OK	\$399	\$3,908,273	8,725	4%
Amarillo, TX	\$115	\$4,968,462	10,464	5%
Wichita, KS	\$103	\$9,285,654	30,553	13%
Oklahoma City	\$92	\$7,771,248	22,700	10%
Dallas/Fort Worth	\$79	\$61,093,431	111,038	48%
Joplin, MO	\$71	\$2,059,163	5,180	2%
Little Rock, AR	\$45	\$5,149,932	12,204	5%
Kansas City	\$27	\$4,472,166	13,089	6%
Fort Smith, AR	\$25	\$1,917,261	6,221	3%
Springfield, MO	\$25	\$2,392,903	8,788	4%
Sherman/Ada TX/OK	\$0	\$0	0	0%
Tulsa	\$0	\$0	0	0%
<b>TOTAL</b>	<b>\$65</b>	<b>\$103,018,492</b>	<b>228,962</b>	

### What makes a high performing market?

Considered in this overall context of both total direct spending and ROI, it is clear that there are numerous issues that can contribute to creating a high performing market. These include the market size, media, media costs, level of travel and incremental travel, and the competitive situation. There are also factors such as the ease of getting to the State, and specific activities or events that are more or less accessible in Oklahoma. Given this wealth of factors and how they combine in the individual markets, it is not always possible to totally identify what made each market perform well or poorly. Plus, in some cases, these factors offset each other in terms of explaining performance. But some factors can be identified and explored to provide tactical guidance.

First of all, a high performing market is one where the advertising can influence travel. When the level of travel or familiarity is too low, it is difficult to create travel – but when there is already high travel it can be difficult for the advertising to generate any incremental trips. Therefore, the markets that provide the most potential are those where there is already some travel and some potential, but where the market has not yet become saturated. ***If the base level of travel (travel without advertising) is below 15% or above 40% it will be difficult to generate a strong level of incremental travel and a good ROI. Of course, over time advertising can help increase familiarity and travel to Oklahoma, but this should be considered a longer term investment.***

When considering new markets, it can be difficult to know what the base level of travel is. But one of the factors that's most closely correlated to the level of travel is distance. In exploring this issue, SMARI used distance to Oklahoma City as a surrogate for distance to the center of the state. The markets that were targeted range from in-state markets to some markets that are more than 300 miles from Oklahoma City. The markets that performed the best are all within 250 miles of Oklahoma City, and those that were farther away tended to have the lower levels of travel. (Some are closer to Tulsa, but there was much less correlation between the distance to Tulsa and levels of travel.) Again, it may make sense for the state to target these markets, but they are unlikely to perform well in the short-term, and may require a concentration of resources. ***If these more distant markets are to be targeted, the key seems to be investing in these markets to raise the overall familiarity, which leads to increased travel.***

Dallas/Fort Worth is a good example of a market where the base level of travel is fairly low (14%), but where investment over time is now showing a strong return. But this market did not perform as well in 2007, and it took a longer period of concentrated media and the right message to generate a strong ROI, and significant direct expenditures.

Another important factor is the size of the market, as smaller markets cannot generate a large number of trips. For OTRD, one market – Dallas/Fort Worth – is much larger than all of the others and therefore generates the most trips and direct spending. ***This one market is responsible for more than half of the success of the campaign, and the top five largest markets are responsible for 85% of the direct spending. Of course, some of the larger markets that are farther away have low base levels of tourism – including Kansas City and Little Rock. These markets generated strong direct spending, even though the ROI was low. This is a case where the size of the market and the distance from the state need to be balanced to determine the best strategy – both long-term and short-term.***

Finally, it is key to ensure that if OTRD is going to target a specific market that the media dollars are generating enough awareness. This is especially true in the larger, more distant markets that are much less familiar with the Oklahoma tourism product. If the campaign is not effective in reaching this market, it cannot influence a large enough group of visitors. This becomes an issue of balancing the media dollars. ***The markets that struggled generally had television awareness percentages below 50%.*** This would suggest that this is a reasonable target to use in media planning.

The following section will review each market in more detail, and provide insight into what has occurred in that market, the potential, and information on what motivated visitation from the area. But in overview, there are several key points that OTRD should consider in developing its market-by-market strategy:

1. ***ROI is not the best or sole measure for market selection.*** Larger markets generate more direct spending for the state – even when the ROI is not as favorable.
2. Some of the larger markets are more distant from the state, and therefore require a higher concentration of resources. Where this is occurring, such as Dallas/Fort Worth, the results are extremely strong. ***But where the awareness remains low, so does the direct impact and ROI.***
3. In general, ***OTRD should aim at generating at least 50% television advertising awareness*** to reach the desired level of density and interest to generate incremental travel in substantial levels.
4. ***Markets that are both smaller and more distant hold much less potential,*** and therefore it might make sense to consolidate and move resources to dedicate them toward the larger markets.
5. ***With in-state or border markets, saturation can be an issue.*** This doesn't mean that advertising is not necessary, as it is likely that other states would capture travel from these markets if Oklahoma didn't stay in the competitive mix. But in these markets the goal should be to maintain market share, or to utilize a more retail strategy that provides specific reasons to travel.

The following provides a much more detailed analysis of each of the markets that was targeted. ***All of the data in the following analysis is based on the Advertising Effectiveness & ROI research, and does not include the Conversion research.***

# Dallas/Fort Worth

# ROI: \$79

Dallas/Fort Worth is the most important market targeted by the OTRD. It is the largest market, and generated 48.5% of all incremental trips and 59.3% of the direct expenditures from the incremental trips. The success in Dallas/Fort Worth drove the overall success of this campaign.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures
<b>Dallas/Fort Worth</b>	111,038	48.5%	\$61,093,431	59.3%

Not only is this a large market, but awareness of the advertising was high, and the increment of travel was also above average. Additionally, the average trip expenditures were the highest of any market, at \$550 per trip. This all worked to generate the high level of incremental trips and direct expenditures. At the same time, this is an expensive market, so the ROI is above the \$58 average, but not one of the highest. Therefore, understanding this market can provide insight into how to further increase the ROI in this market.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Dallas/Fort Worth</b>	1,759,793	70.4%	1,239,399	10.2%	\$550
Comparison	33.3%	111	36.8%	132	122

As the overview highlighted, the success of specific markets related to factors such as distance and the existing levels of visitation. The existing levels of visitation relate to the competitive situation, and what brings people from other markets to Oklahoma. So a review of these factors provides a good context for evaluating the impact of the advertising and marketing.

Using the distance measurement from Oklahoma City, Dallas/Fort Worth is approximately 200 miles from the state. This makes it in the middle of the distance range, which has proven so important. For Dallas/Fort Worth residents, the most popular destination by far is somewhere in the state of Texas. But Oklahoma is the second most popular, and 23% of the respondents report having visited in the past year. This puts Oklahoma in a strong position, and highlights how an aggressive campaign can work in a market with lower visitation.

State Visited	Dallas/Fort Worth
Texas	60%
<b>Oklahoma</b>	<b>23%</b>
Louisiana	17%
Arkansas	14%
None of these	12%
Colorado	11%
New Mexico	10%
Missouri	9%
Kansas	4%
Nebraska	2%

At the same time, compared to the other markets, Dallas/Fort Worth exhibits a below average level of familiarity. This suggests that this market holds further potential. If familiarity can be improved, it is likely that visitation will also increase. Advertising awareness is high, so increasing familiarity may be simply a matter of time – and the right message.

Market	Visitation Index	Familiarity Index
<b>Dallas/Fort Worth</b>	84	96

\* Index to overall visitation and familiarity where 100 is average

To understand what brings people to Oklahoma from the Dallas/Fort Worth area, the research identified what people did on their trips, and which of the activities were planned in advance. The activities that were planned in advance can be considered “motivators.” The table on the next page then shows the “net” calculation, which indicates the percentage of total visitors that pre-planned a specific activity. This highlights the difference between activities that are important in the destination selection (pre-planned) versus those that are available in many cities. For example, gambling was the most popular activity that people reported on their trips, and 80% of those doing so, planned to gamble in advance. Other motivators included scenic drives and scenic areas, state and national parks and recreation areas and water activities. In contrast, shopping is a popular activity, but not one that is pre-planned.

These findings suggest that Oklahoma’s appeal is a mix of gambling and scenery related activities. Interestingly, those who report gambling on a trip to Oklahoma report participation in more activities (4 on average compared to 2.9 for non-gamblers). The types of activities that they are more likely to participate in are scenic drives, state and national parks and visiting historic sites or landmarks. However, this is not the case when gambling was a pre-planned

activity. Therefore, within the gambling niche there seems to be two distinct groups – one that comes to the state for gambling, and another that sees gambling as an activity on a trip that is more oriented toward sightseeing in the state.

While the more focused gamblers may not be a good target for a statewide campaign, it seems to make sense to ensure that people understand that gambling is an option – along with many other opportunities.

Activity	Participated	Motivated	Net
Gambling	44%	80%	35%
Scenic drives or scenic areas	32%	59%	19%
State or national parks and recreation areas	23%	79%	18%
Water activities	18%	100%	18%
Historic sites or landmarks	27%	63%	17%
Restaurants or active nightlife	37%	40%	15%
Camping or RVing	15%	100%	15%
Shopping	26%	45%	12%
Attractions such as museums	13%	76%	10%
Attractions like zoos, theme parks, etc.	12%	87%	10%

Given the importance of trips from the Dallas/Fort Worth area, how did the campaign generate high levels of incremental travel, and what are good strategies for the future?

As noted, overall the level of advertising recall in the Dallas/Fort Worth area was high. This was driven by strong recall of the television advertising, and augmented by above average recall of online ads. The recall of the print elements was actually below average. Television penetration is critical, but online can offer a good augment to television. The key may be making sure that the online is targeted, and that the message is meaningful to this audience. This might be an opportunity to create specialized messaging appealing to this market, and geo-targeted for the online ads.

Media	Recall	Index
Online	51%	120
Print	14%	92
Television	55%	113
All advertising	70%	111

Perhaps due to the lower level of familiarity, consumers in Dallas/Fort Worth seem quite open to the Oklahoma tourism message – and report strong impact

from the advertising. Those who have seen the ads are generally much more positive about the state. The largest positive impacts occurred for being a good family destination, a good value, having outdoor and scenic attractions, and having lots of casinos. The advertising also helped dispel negative concerns about the area.

Dallas/Fort Worth	Image Impact
Is great for the family	0.4
Is a good value	0.4
Offers many opportunities for outdoor activities	0.3
Has natural beauty	0.3
Is an appealing destination to visit	0.3
Has a clean and unspoiled environment	0.3
Has lots of casinos	0.3
Has lots of lakes and shorelines	0.3
Has little to do	-0.2
Is dry and dusty	-0.2
Doesn't seem like a place to take a vacation	-0.3
Has flat and uninteresting scenery	-0.3

Only shows ratings +/- .2 or stronger

The result is that the advertising reinforces interest in the area, and reveals consumers who indicate a stronger likelihood to visit. This suggests that expanding the reach of the advertising in this market will result in more travel.

Dallas/Fort Worth	No Ad Recall	Saw Advertising
Likelihood to visit	25.0%	37.1%

***Dallas/Fort Worth is currently the most critical market for Oklahoma. This market performed very strongly this year, and generated 48.5% of the incremental trips and 59% of the incremental economic impact. It is even more encouraging, that this market seems to offer additional potential. The levels of visitation and familiarity are still below average, which represents an opportunity to educate this audience. The current advertising works well in this market, and improves both the image of the state as well as intentions to visit. People from Dallas/Fort Worth who visit Oklahoma are looking for two main types of activities: 1) gambling, or 2) scenery and outdoor activities. For both types of trips gambling is a favored activity for many, so this is an important element of the message. But it is also critical to continue to position Oklahoma as a state with scenic beauty and lots of things to do outdoors.***



# Wichita

# ROI: \$103

While Dallas/Fort Worth is both the biggest market and the most important market for Oklahoma Tourism, the second most important market is Wichita, Kansas. This market is not especially large (it is 6<sup>th</sup> largest among the markets targeted), but it generated 13.3% of the incremental trips and 9% of the incremental expenditures, which was the second highest among these markets. Since this is a smaller market that had such a strong impact, it is important to assess what led to such success.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures
<b>Wichita, KS</b>	30,553	13.3%	\$9,285,654	9.0%

In fact the key to the performance of this market was the level of incremental travel – it had the highest level at 14.5%. The level of awareness was actually slightly below average, and the trip expenditures were quite low – but the incremental travel was almost twice the average of the other markets. As a result, the \$103 ROI for this market is well above the \$65 average, and is actually one of the highest.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Wichita, KS</b>	377,342	60.5%	228,266	13.4%	\$304
Comparison	7.1%	95	6.8%	197	68

One thing the overall evaluation indicated was that opportunity lies in markets where Oklahoma has developed some familiarity, but where visitation still lags below the average. In these markets, the advertising can have a strong impact. These factors apply to the Wichita market, which still has below average levels of visitation and familiarity. This is also an interesting market because it is close to Oklahoma, but the visitation is below average, indicating that in this case distance isn't as important as in other markets.

Market	Visitation Index	Familiarity Index
Wichita	97	95

One of the reasons that visitation is below average is that there is a lot of competition for Oklahoma. Wichita residents are most likely to travel within

their home state, and then to visit Missouri. Missouri has an aggressive advertising campaign to attract people to its state, so it is important that the Oklahoma message is prevalent and meaningful.

State Visited	Wichita
Kansas	57%
Missouri	35%
<b>Oklahoma</b>	<b>27%</b>
Colorado	18%
Texas	16%
None of these	8%
Arkansas	7%
Nebraska	7%
New Mexico	4%
Louisiana	3%

For Wichita visitors, gambling is the biggest motivator, although it was only a key for 19% of the visitors. Other key activities that were pre-planned included attractions such as zoos and theme parks, camping and water activities. Interestingly, visitors from Wichita participate in fewer activities in Oklahoma (2.5 versus an average of 3.2).

Wichita	Participated	Motivated	Net
Gambling	25%	77%	19%
Attractions like zoos, theme parks, etc.	19%	70%	13%
Camping or RVing	13%	100%	13%
Water activities	19%	70%	13%
Restaurants or active nightlife	45%	25%	11%
Shopping	21%	55%	11%

Perhaps the most interesting finding for this market is the impact of the advertising. Those who saw the Oklahoma ads rated the state much more positively, in every category – both in viewing the state more positively and less negatively.

Wichita	Image Impact
Has plenty to do and see	0.6
Is interesting	0.6
Has lots of lakes and shorelines	0.5
Is an appealing destination to visit	0.5
Has unique events	0.5

Wichita	Image Impact
Has natural beauty	0.5
Is exciting	0.5
Offers many opportunities for outdoor activities	0.5
Has lots of shopping	0.5
Is a good place to experience Native American or Western culture	0.4
Is great for the family	0.4
Is a good value	0.4
Has lots of historical sites	0.4
Is restful/relaxing	0.4
Has a clean and unspoiled environment	0.4
Has lots of entertainment & nightlife	0.4
Has lots of casinos	0.3
Is progressive	0.3
Has hidden treasures	0.3
Is cool/hip	0.2
Is modern	0.2
Is urban	0.2
Is not welcoming to everyone	-0.2
Has flat and uninteresting scenery	-0.4
Has little to do	-0.5
Doesn't seem like a place to take a vacation	-0.6

Only shows ratings +/- .2 or stronger

Yet, it isn't that the advertising is especially meaningful among this audience. In fact, the ratings of the ads are below average. This suggests that the ads are not focused specifically on a meaningful message for Wichita residents.

Rating	Index
Make it seem like an appealing destination to visit	91
Make you want to find out more about traveling to or within Oklahoma	91
Make you want to visit the web site or call for more information	88
Make you want to visit Oklahoma for a leisure trip	92
Make it look like there are a lot of different things to do there	93
Show unexpected attractions or activities	89

In fact, the key seems to be that people in Wichita start with such a negative image of Oklahoma. This means that few people are interested in visiting the state – unless they are educated and prompted. Overall, 37% of the people in

the target markets rate Oklahoma as a good place to visit, while in the Wichita market only 32% give the state a positive rating. The advertising has a strong positive impact on that rating, as well as likelihood to visit.

Wichita	No Ad Recall	Saw Advertising
Rating of Oklahoma	19.8%	44.4%
Likelihood to Visit	24.7%	45.5%

The major impact of the advertising means that reaching a large audience in this market will have a strong impact. Yet, the recall of advertising is actually below average. Obviously, increasing the awareness would indicate that there would be even a stronger impact from this market.

Media	Recall	Index
Online	36%	84
Print	14%	93
Television	47%	95
Any advertising	60%	95

***These findings suggest that this is a market where additional dollars could provide a positive return. Based on the cost to reach an aware household, if that relationship holds, an additional \$5,000 in media expenditures would help raise the overall awareness to the average. If the additional aware households traveled at the same level, this would likely result in about \$400,000 more in direct spending and a slightly improved ROI. Given the performance of some of the other markets, it would make sense to focus more on Wichita. This market starts with a fairly lukewarm image of Oklahoma, and therefore the advertising has a strong impact and it only makes sense to expand the impact. At the same time, promoting the gambling product would also be beneficial in this market.***

# Oklahoma City

# ROI: \$92

The market that generated the third most trips and direct expenditures was the major in-state market. Oklahoma City generated 9.9% of the trips and 7.5% of the direct expenditures. This year, OTRD actually reduced its expenditures in Oklahoma City compared to 2007 (from \$107,000 to \$84,000). Additionally, two years ago, this was not a strong performing market, and the incremental travel was quite low. Oklahoma City is an important market, and the fact that it's in-state just reinforces the success.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures
<b>Oklahoma City</b>	22,700	9.9%	\$7,771,248	7.5%

A key element of the success in this market was the high level of advertising recall. While the increment was below average, the advertising recall was one of the highest. This meant that there were more households that were influenced and traveled. The levels of trip expenditures are lower, as the trips are shorter (2.0 nights versus the 2.3 average).

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Oklahoma City</b>	529,574	75.7%	401,058	5.7%	\$342
Comparison	10.0%	119	11.9%	83	76

Recall of the advertising is comparatively high across all the media, but is especially high for the online and print elements. Of course, television drives the high levels of recall, and the media plan in Oklahoma City was effective. The higher recall of print and online is noteworthy and may suggest that the creative resonated more with the in-state audience. Again, especially with online it might make sense to have targeted messages for specific markets.

Media	Recall	Index
Online	48%	112
Print	21%	140
Television	57%	117
All advertising	76%	119

Of course, visitation and familiarity in this market is high – in fact, as might be expected, those in Oklahoma City reported the highest level of travel and almost the highest level of familiarity. The key is not educating people in this

market; it is giving them reasons to actually travel within the state, rather than leaving it.

Market	Visitation Index	Familiarity Index
Oklahoma City	193	135

The key competitor for Oklahoma is Texas – the level of visitation to that state is almost as high. Therefore, the ads used in Oklahoma City should focus on differentiating Oklahoma from what residents can find in Texas.

State Visited	Oklahoma City
<b>Oklahoma</b>	<b>53%</b>
Texas	45%
Missouri	19%
Kansas	13%
Arkansas	13%
Colorado	12%
New Mexico	9%
None of these	8%
Nebraska	2%
Louisiana	2%

The good news is that the current advertising does have a positive impact on both the image of the state as a travel destination and in terms of future visitation. While the level of projected visitation among those with no advertising recall is high, it is 10 points higher once consumers are exposed to the ads.

Wichita	No Ad Recall	Saw Advertising
Likelihood to Visit	73.0%	83.5%

The strongest impact of the advertising is convincing residents that the state has lots of lakes, shorelines, entertainment, and nightlife. The ads also do a good job counteracting perceptions that the state has little to do.

Oklahoma City	Image Impact
Has lots of lakes and shorelines	41%
Has lots of entertainment & nightlife	28%
Is progressive	25%
Has lots of historical sites	22%
Is cool/hip	21%

Oklahoma City	Image Impact
Has plenty to do and see	0.2
Has lots of shopping	0.2
Is interesting	0.2
Is an appealing destination to visit	0.2
Has little to do	-0.2
Is not welcoming to everyone	-0.3

Only shows ratings +/- .2 or stronger

The key activities for visitors from Oklahoma City are quite different from other markets. The biggest motivator is restaurants and nightlife, followed by scenery/scenic drives and shopping. This is one of the only markets where shopping is a key activity. Gambling is less important in this market.

Oklahoma City	Participated	Motivated	Net
Restaurants or active nightlife	41%	57%	23%
Scenic drives or scenic areas	37%	54%	20%
Shopping	31%	54%	17%
Attractions like zoos, theme parks, etc.	19%	83%	16%
Water activities	21%	74%	15%
State or national parks and recreation areas	19%	72%	14%
Gambling	16%	79%	13%
Attended festivals or fairs	15%	78%	12%
Camping or RVing	13%	89%	11%
Quaint attractions or small towns	27%	40%	11%
Route 66	17%	62%	11%

***Given the size of this market, it is important to have a strong impact and motivate additional travel. The media plan works well in this market, and there is no need to spend more money. The key seems to be focusing the messages to promote travel. For this market, the key seems to be a mix of an urban message and promoting the scenery of the state.***

# Kansas City

# ROI: \$27

Kansas City is a large market where the ROI is well below average – and well below what should be the potential for this market. Perhaps the only encouraging factor is that in 2007 this market did not provide any incremental travel, so the performance in 2009 is actually more positive. This means that the direct expenditures from this market were fairly sizable – although, again, not at the level that would be expected. The issue is really the low increment of travel – and it isn't because there is a lot of travel among the unaware. There is simply little interest in Oklahoma among people in Kansas City, and this makes it difficult to generate travel.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures
<b>Kansas City</b>	13,089	5.7%	\$4,472,166	4.3%

A key problem in this market is the level of awareness, and the fact that fewer people see the ads. The level of spending in this market is similar to 2007, but the ad awareness is actually lower. Increasing the awareness among this audience seems critical to generate travel.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Kansas City</b>	718,474	49.0%	352,356	3.7%	\$342
Comparison	13.6%	77	10.5%	54	76

The level of advertising recall is low across all the media considered, with the television recall being especially low. Television recall drives overall recall and is important in this market. The cost to reach a household is about average for Kansas City, so this indicates that what is necessary is more money spent on media. The online and print didn't contribute much recall, so this would suggest that additional money should be spent on television.

Media	Recall	Index
Online	35%	83
Print	11%	72
Television	37%	76
All advertising	40%	77



In Kansas City, familiarity with Oklahoma is low, and this results in very low levels of visitation. Without advertising, people from Kansas City are unlikely to come to Oklahoma.

Market	Visitation Index	Familiarity Index
<b>Kansas City</b>	43	77

This disinclination to visit is evident when likelihood to travel is considered. But there seems to be opportunity, as the advertising creates interest. Since the baseline level of travel is so low, the advertising can have a significant impact.

Kansas City	No Ad Recall	Saw Advertising
Likelihood to Visit	12.1%	22.2%

Yet, the competitive situation is daunting in this market. People in this area are on the border of Missouri and Kansas and these are the states they tend to visit. But Oklahoma is far down the list of places to visit – and in fact, Kansas City residents are more likely to visit Colorado or Texas or states outside of this competitive set. Therefore, the advertising has to give compelling reasons to get consumers to consider Oklahoma.

State Visited	Kansas City
Missouri	56%
Kansas	37%
Colorado	15%
Texas	14%
None of these	13%
<b>Oklahoma</b>	<b>12%</b>
Arkansas	11%
Nebraska	10%
New Mexico	4%
Louisiana	3%

The advertising does have an impact on image, although it is less effective than in many of the other markets. The strongest positive impacts relate to showing Oklahoma as an interesting place, with natural beauty and the Native American experience. The ads also do a good job of positioning the state as a good place for a vacation.

Kansas City	Image Impact
Is interesting	0.3
Has natural beauty	0.3
Is a good place to experience Native American or Western culture	0.3
Has lots of historical sites	0.2
Has hidden treasures	0.2
Is an appealing destination to visit	0.2
Has little to do	-0.2
Doesn't seem like a place to take a vacation	-0.2

Only shows ratings +/- .2 or stronger

For many of the markets, the key activity that brings people to the state is gambling. But people in Kansas City have gambling in their city, and therefore it is less likely to bring them to Oklahoma. Instead, they travel for restaurants and nightlife and historic sites, then gambling. People from Kansas City don't travel to Oklahoma for the scenery or outdoor activities.

Kansas City	Participated	Motivated	Net
Restaurants or active nightlife	51%	43%	22%
Historic sites or landmarks	31%	53%	16%
Gambling	18%	80%	15%
Attractions like zoos, theme parks, etc.	18%	70%	13%
Native American events or attractions	15%	88%	13%
Attractions such as museums	20%	64%	13%
Quaint attractions or small towns	24%	54%	13%
Shopping	29%	44%	13%
State or national parks and recreation areas	16%	67%	11%
Watching sporting events	15%	75%	11%

***This is the second largest market that is targeted by OTRD, but it is also one of the farthest markets from the center of the state. People in Kansas City have low familiarity with Oklahoma, and currently prefer to visit many other states. Yet, having focused on this market over time, Oklahoma seems to be making progress. While the ROI is still less than many other places, this market did see improved performance since 2007. A main barrier to better performance seems to be low advertising recall, and this was basically a function of the media expenditures. To better penetrate this market, OTRD will need to invest more money, and it would take about \$50,000 to bring recall up to the average, based on the cost to reach an aware household. But if the increment was maintained, this would return about \$1 million in direct spending.***

# Little Rock

# ROI: \$45

The Little Rock market also has a lower ROI, representing 5.3% of the trips and 5.0% of the expenditures. Therefore, while the ROI is not very strong, this market was responsible for a sizable amount of direct spending. This market typifies the large market, far from the center of the state, which represents potential but is not performing strongly. OTRD invested much more money in this market this year compared to 2007, the ROI is improved, and direct expenditures are up from \$2 million to \$5 million. This suggests that the additional investment was warranted, but also that stronger performance would have generated more impact.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures
Little Rock, AR	12,204	5.3%	\$5,149,932	5.0%

As with Kansas City, a key problem with this market was the level of advertising awareness. In fact, even though the investment in this market was increased substantially, the level of advertising recall was actually lower. The cost to reach a household in this market was a bit above average, which would suggest that the media was not as efficient as in other markets. The increment was also lower than the average, but was stronger than in 2007.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
Little Rock	436,980	52.6%	229,845	5.3%	\$422
Comparison	8.3%	83	6.8%	78	94

The advertising recall is low for both the online and television ads, but actually above average for the print ads. In this market, the synergy between on-line and television helped increase overall awareness significantly.

Media	Recall	Index
Online	38%	83
Print	16%	107
Television	40%	81
All advertising	53%	83

The markets that are farther away, such as Little Rock, tend to have little familiarity with Oklahoma and low levels of visitation. Therefore the goal should be to educate people about what differentiates Oklahoma.

Market	Visitation Index	Familiarity Index
<b>Little Rock</b>	44	75

People generally travel the most within their home state, and this is true for Little Rock residents. They also like to travel to Missouri, Texas, and Louisiana more than Oklahoma. As with Kansas City, they are also more likely to visit states outside this competitive set before they come to Oklahoma. This means the advertising has to be especially compelling to make an impact.

State Visited	Little Rock
Arkansas	60%
Missouri	34%
Texas	25%
Louisiana	15%
None of these	14%
<b>Oklahoma</b>	<b>12%</b>
New Mexico	4%
Colorado	3%
Kansas	2%
Nebraska	0%

With a low level of familiarity, people in Little Rock react strongly to the ads, and have a much more positive image. Those who see the ads believe that Oklahoma has more natural beauty, more nightlife, and unique events. In fact, the advertising seems to improve Oklahoma’s image in many areas, and also counteract some of the negative images that may exist.

Little Rock	Image Impact
Has lots of lakes and shorelines	0.6
Has natural beauty	0.5
Has lots of entertainment & nightlife	0.5
Is exciting	0.5
Has unique events	0.4
Has hidden treasures	0.4
Is an appealing destination to visit	0.4
Has plenty to do and see	0.4

Little Rock	Image Impact
Is urban	0.4
Has lots of historical sites	0.4
Offers many opportunities for outdoor activities	0.4
Is a good value	0.4
Is progressive	0.3
Is interesting	0.3
Is great for the family	0.3
Has lots of shopping	0.3
Has lots of casinos	0.3
Has a clean and unspoiled environment	0.3
Is restful/relaxing	0.3
Is cool/hip	0.3
Is modern	0.3
Is a good place to experience Native American or Western culture	0.2
Is too conservative	-0.1
Doesn't seem like a place to take a vacation	-0.2
Is not welcoming to everyone	-0.2
Has flat and uninteresting scenery	-0.2
Is dry and dusty	-0.3
Has little to do	-0.3

Only shows ratings +/- .2 or stronger

The result is that those who have seen the advertising are highly more likely to indicate they will visit. This finding, in conjunction with the improved performance over the past two years (in terms of direct spending), suggests that Little Rock is a market with potential.

Little Rock	No Ad Recall	Saw Advertising
Likelihood to Visit	9.2%	24.2%

As with many of the other markets, a key activity that seems to attract visitation is gambling. For Little Rock residents, this ties with state and national parks as a key motivator. There is also strong participation and interest in scenery, Route 66, water activities, and Native American attractions. The good news is there seem to be a number of differentiating activities that can be used to promote the state.

Little Rock	Participate	Motivate	Net
Gambling	29%	75%	21%
State or national parks and recreation areas	21%	100%	21%
Scenic drives or scenic areas	39%	45%	18%
Route 66	21%	83%	18%
Water activities	14%	100%	14%
Native American events or attractions	14%	100%	14%
Other ethnic events or attractions	11%	100%	11%
Camping or RVing	11%	100%	11%
Restaurants or active nightlife	50%	21%	11%
Shopping	25%	43%	11%
Go to a concert, theatre, ballet, or other performance	14%	75%	11%
Quaint attractions or small towns	32%	33%	11%

*This is another large market, far from the center of the state. Therefore, key questions are whether this market is too far away and whether it merits advertising investment. While the ROI is below the average, this market did generate a significant number of incremental trips and did perform much better this year compared to 2007. The strong response to the advertising and the increased interest in visiting suggest that there is potential in this market. This market also is less expensive than Kansas City, and shows a bit more potential. The lower advertising recall suggests that investing more money in this market will have a good return. Based on past performance, an investment of about \$25,000 would bring recall to the average, and with the current increment would result in approximately another \$1 million in direct spending.*

# Small High-Performing Markets

Three markets are small, but had high increments of travel. Due to the size of these markets, the overall impact is small – but understanding these markets may help refine the marketing in other areas. The ROI for two of these markets was the highest achieved, and the third was above average. The direct spending in these markets was certainly not as high as the ROI, but was meaningful. While these are fairly small markets, and only represent 8.5% of the households targeted, the strong increment meant that these markets generated 12.2% of the trips and 12.4% of the direct expenditures.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures	ROI
<b>Joplin, MO</b>	5,180	3.8%	\$2,059,163	3.8%	\$71
<b>Amarillo, TX</b>	10,464	4.6%	\$4,968,462	4.8%	\$115
<b>Wichita Falls</b>	8,725	3.8%	\$3,908,273	3.8%	\$399

The performance in Wichita Falls was strong, even though advertising recall was below average, while recall in Joplin and Amarillo was about average. In general, what distinguishes these markets is the high level of incremental travel – those who saw the ads were much more likely to visit Oklahoma. Both Amarillo and Joplin were high-performing markets in 2007 and continue to do well, while Wichita Falls did not do well in 2007 but has become a strong performer.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Joplin, MO</b>	128,412	61.1%	78,465	6.6%	\$398
Comparison	2.4%	96	2.3%	97	88
<b>Amarillo, TX</b>	158,662	64.8%	102,785	10.2%	\$475
Comparison	3.6%	102	3.1%	150	106
<b>Wichita Falls, TX</b>	132,622	59.0%	78,250	11.2%	\$448
Comparison	2.5%	93	2.3%	164	100

These are markets that already like Oklahoma as a travel destination. They are familiar with the state and report fairly high levels of visitation, although visitation is not as strong in Joplin. For these markets, the goal isn't to educate consumers, but rather to remind them of the positive aspects of Oklahoma and reinforce reasons for them to choose it over other options. At the same time, sometimes where familiarity is high, it is important to expand the existing image.

Market	Visitation Index	Familiarity Index
Joplin	91	103
Amarillo	114	106
Wichita Falls	151	121

As in other markets, the home state seems to generate the most travel from a market. But for all of these markets, Oklahoma gets fairly high levels of visitation, and is fairly competitive. Joplin is actually the market which is the most competition for Oklahoma, and this is why visitation is lower than the other two. But in each of these markets, the advertising was able to generate significant incremental travel, which suggests there is potential for growth.

State Visited	Joplin, MO	Amarillo, TX	Wichita Falls/Lawton, TX
Texas	7%	70%	52%
New Mexico	1%	35%	7%
<b>Oklahoma</b>	<b>25%</b>	<b>31%</b>	<b>41%</b>
Colorado	4%	19%	8%
Kansas	32%	7%	7%
Missouri	67%	6%	14%
None of these	7%	4%	7%
Nebraska	3%	2%	3%
Louisiana	2%	2%	6%
Arkansas	28%	2%	10%

As in the other markets, the key element driving recall is the television advertising. The television recall in Amarillo was strong, and therefore overall recall was strong. Wichita Falls was one of the few markets where recall of print and online was strong, and where these media provided a significant boost to the overall recall. Joplin had average recall for the television, and was augmented slightly by high print recall. In each case, it was not necessarily strong advertising recall that generated the strong ROIs for these markets.

Media	Joplin Recall	Joplin Index	Amarillo Recall	Amarillo Index	Wichita Falls Recall	Wichita Falls Index
Online	42%	99	39%	93	42%	98
Print	19%	124	12%	80	21%	137
Television	49%	100	52%	106	41%	84
All advertising	61%	96	65%	102	59%	93



While all of these markets generated strong increments of travel this year, it is interesting to note that the future potential is not as clear – especially for Amarillo, where while those who saw the advertising visited more, they don't indicate that they are more likely to visit in the future. But this is not the case for Wichita Falls or Joplin, where future potential is clear and strong.

Likelihood to Visit	No Ad Recall	Saw Advertising
Joplin	32.1%	46.4%
Amarillo	41.0%	41.0%
Wichita Falls	62.2%	73.8%

The impact of the advertising in Joplin was fairly strong, but more limited than in some areas. The key images that were altered by the advertising involved portraying Oklahoma as clean and unspoiled, with lots of lakes and shorelines, plenty to do, and being an appealing place to visit. The ads also seemed to help counteract some negative perceptions.

Joplin	Image Impact
Has a clean and unspoiled environment	0.3
Has plenty to do and see	0.3
Has lots of lakes and shorelines	0.3
Is an appealing destination to visit	0.3
Is exciting	0.2
Is urban	0.2
Is a good value	0.2
Has natural beauty	0.2
Is great for the family	0.2
Doesn't seem like a place to take a vacation	-0.3
Is not welcoming to everyone	-0.3
Is dry and dusty	-0.3

Only shows ratings +/- .2 or stronger

The activities that are key for people visiting Oklahoma from Joplin include restaurants and nightlife, Route 66, attractions such as zoos and theme parks, and Native American events and attractions. The visitors from Joplin were the most likely to report visiting Route 66 on their trips, so obviously this is an important asset to promote in this area.

Joplin	Participate	Motivate	Net
Restaurants or active nightlife	43%	75%	32%
Route 66	39%	73%	29%
Attractions like zoos, theme parks, etc.	36%	80%	29%
Native American events or attractions	32%	89%	29%
State or national parks and recreation areas	29%	88%	25%
Scenic drives or scenic areas	32%	67%	21%
Water activities	29%	75%	21%
Shopping	43%	50%	21%
Gambling	25%	71%	18%
Attended festivals or fairs	14%	75%	11%
Camping or RVing	11%	100%	11%
Quaint attractions or small towns	11%	100%	11%
Attractions such as museums	18%	60%	11%

Amarillo	Image Impact
Has plenty to do and see	0.6
Is a good value	0.5
Has natural beauty	0.5
Is cool/hip	0.5
Has lots of entertainment & nightlife	0.5
Is great for the family	0.5
Is exciting	0.4
Is restful/relaxing	0.4
Has lots of shopping	0.4
Is an appealing destination to visit	0.4
Is interesting	0.4
Has unique events	0.3
Offers many opportunities for outdoor activities	0.3
Has hidden treasures	0.3
Is modern	0.3
Has lots of historical sites	0.3
Is progressive	0.2
Is a good place to experience Native American or Western culture	0.2
Is dry and dusty	-0.2
Has flat and uninteresting scenery	-0.3
Is too conservative	-0.3
Is not welcoming to everyone	-0.6
Doesn't seem like a place to take a vacation	-0.6
Has little to do	-0.7

In Amarillo, the advertising had a very strong impact on consumers' image of Oklahoma. Interestingly, since consumers were already familiar with the state the strongest impact was in terms of having lots to do and being a good value. The advertising also counteracted many of the negative images people might have about the state.

Amarillo is an interesting market in terms of the key activities, with attractions such as zoos and theme parks being the most popular, followed by restaurants and nightlife, museums, Native American attractions, gambling, scenic drives and shopping. In fact, there are a number of different activities that all appeal to fairly small segments of visitors. This suggests that a key message needs to be variety.

Amarillo	Participated	Motivated	Net
Attractions like zoos, theme parks, etc.	27%	86%	23%
Restaurants or active nightlife	46%	42%	19%
Attractions such as museums	19%	80%	15%
Native American events or attractions	15%	100%	15%
Gambling	19%	80%	15%
Scenic drives or scenic areas	35%	44%	15%
Shopping	35%	44%	15%
State or national parks and recreation areas	15%	75%	12%

Wichita Falls	Image Impact
Has lots of historical sites	0.6
Offers many opportunities for outdoor activities	0.6
Has unique events	0.6
Has hidden treasures	0.5
Is a good place to experience Native American or Western culture	0.5
Is interesting	0.4
Is exciting	0.3
Is an appealing destination to visit	0.3
Is great for the family	0.3
Is restful/relaxing	0.3
Has lots of shopping	0.3
Has natural beauty	0.3
Is a good value	0.3
Has lots of casinos	0.3
Has a clean and unspoiled environment	0.2
Has little to do	-0.3
Is too conservative	-0.3
Doesn't seem like a place to take a vacation	-0.5
Has flat and uninteresting scenery	-0.7

In Wichita Falls, the impact of the advertising was also very strong, and those who have seen the ad view Oklahoma as having more historical sites, outdoor opportunities, unique events and hidden treasures. Additionally, the advertising helped overcome negative perceptions. Most importantly, even though people indicated that they had strong familiarity with the state, the advertising can expand their image and have a positive impact.

For visitors from Wichita Falls, there are a couple of main motivators – restaurants and nightlife, gambling and shopping. Therefore a message that focuses on gambling, as well as urban experiences, will be the most motivating.

Wichita Falls	Participated	Motivated	Net
Restaurants or active nightlife	56%	55%	31%
Gambling	39%	64%	25%
Shopping	33%	75%	25%
Scenic drives or scenic areas	28%	60%	17%
Quaint attractions or small towns	17%	83%	14%
Participate in sporting events or tournaments	11%	100%	11%
Water activities	14%	80%	11%
State or national parks and recreation areas	17%	67%	11%
Attractions like zoos, theme parks, etc.	11%	100%	11%

*Two of these markets (Amarillo & Wichita Falls) provided the strongest ROIs among the 12 markets measured, so it is important to understand why they work. While the ROI in Joplin was not as strong, it was above average and can be considered a strong performer. These are established markets for Oklahoma, but the advertising helped promote the positive aspects of the state. These markets generate visitation generally, but they seem to forget the various assets of the state. When they are reminded, they are much more likely to visit. OTRD also spent only a little money in these markets, which made the return strong. Given the size of these markets, it probably doesn't make sense to spend much more, but some investment will help maintain travel and keep Oklahoma competitive.*

# Out-of-State Under-Performing Markets

There were two other out-of-state markets that provided lower ROI and actually performed in a very similar manner. The increment of travel was the same, and the ROI was also the same. These are mid-sized markets that had potential to generate much more incremental travel, but they are relatively far from the state and don't show as much interest in Oklahoma. Therefore, it is useful to consider whether these markets should continue to be included in the media mix, or whether the resources could be more effectively deployed.

For both of these markets, advertising recall and the increment of travel were below average. Furthermore, when people do visit Oklahoma from these markets they spend much less than the average on their trips. All of these factors are critical in terms of the overall impact that was generated.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures
<b>Springfield, MO</b>	314,833	54.0%	170,022	5.2%	\$272
Comparison	6.0%	85	5.0%	76	60
<b>Fort Smith, AR</b>	209,072	57.6%	120,368	5.2%	\$308
Comparison	4.0%	90	3.6%	76	68

As a result, while these markets represent 10% of the targeted population they only generated 6.5% of the incremental trips and 4.1% of the direct expenditures. Even when Oklahoma can generate travel from these markets, it is not very lucrative for the state. The key is whether it is possible to significantly improve performance from these areas.

Market	Incremental Trips	% of Total Trips	Direct Expenditures	% of Direct Expenditures	ROI
Springfield	8,788	3.8%	\$2,392,903	2.3%	\$25
Fort Smith	6,221	2.7%	\$1,917,261	1.9%	\$25

While these two markets are similar in many ways, they do differ in terms of their visitation and familiarity with Oklahoma. People from Fort Smith are familiar with the state, and report high levels of visitation, while this is not the case for people from Springfield. But in both cases the competitive situation is fairly tough.

Market	Visitation Index	Familiarity Index
Springfield	74	85
Fort Smith	148	105

While Fort Smith residents report high visitation to Oklahoma, they are more likely to visit their home state of Arkansas or go to Missouri. And people in Springfield also report more travel to Missouri and Arkansas, with Oklahoma in third place. Therefore the key to motivating travel from these areas is differentiating Oklahoma from both of these states.

State Visited	Springfield	Fort Smith
Missouri	71%	44%
Arkansas	28%	65%
<b>Oklahoma</b>	<b>20%</b>	<b>40%</b>
Kansas	16%	10%
Texas	14%	21%
None of these	12%	6%
Colorado	6%	7%
Nebraska	5%	4%
New Mexico	4%	6%
Louisiana	3%	5%

Of course, the first step is making sure that the advertising is reaching these two markets. In both markets the recall of all the media was low. As noted earlier, both of these markets had high costs to reach an aware household. This suggests that the problem is not spending too little in these markets, but rather that the media was not as efficient – or the message was not as meaningful.

Media	Springfield Recall	Springfield Index	Fort Smith Recall	Fort Smith Index
Online	40%	95	42%	98
Print	14%	90	14%	93
Television	42%	85	45%	91
All advertising	54%	85	58%	90

In Fort Smith, the problem seems to be that the message was not meaningful. The advertising did little to improve the image of the area, and those who saw the ads were actually more negative. This suggests that the current creative is not ideally suited to this market. At the same time, given the high level of travel, any effort to reinforce interest to Oklahoma probably has a positive impact.

Fort Smith	Image Impact
Offers many opportunities for outdoor activities	0.2
Has lots of shopping	-0.2
Is exciting	-0.2
Is a good value	-0.2
Is not welcoming to everyone	-0.3
Is modern	-0.5

Only shows ratings +/- .2 or stronger

In terms of motivating interest among people in this market, some key activities include the scenery, gambling and restaurants. Visitors enjoy a mix of scenery and outdoor activities with more urban amenities.

Fort Smith	Participate	Motivate	Net
Scenic drives or scenic areas	37%	67%	24%
Gambling	35%	59%	20%
Restaurants or active nightlife	47%	43%	20%
Attractions like zoos, theme parks, etc.	22%	73%	16%
Shopping	45%	36%	16%
Historic sites or landmarks	22%	55%	12%
State or national parks and recreation areas	16%	63%	10%

In Springfield, the advertising has a more positive impact and positions the state as progressive, a good value, and a place with natural beauty, entertainment, nightlife, and casinos.

Springfield	Image Impact
Is progressive	0.3
Is a good value	0.3
Has natural beauty	0.3
Has lots of entertainment & nightlife	0.3
Has lots of casinos	0.3
Is restful/relaxing	0.3
Is interesting	0.3
Is modern	0.3
Has plenty to do and see	0.3
Has lots of shopping	0.2
Is great for the family	0.2
Is exciting	0.2
Has a clean and unspoiled environment	0.2
Offers many opportunities for outdoor activities	0.2
Is an appealing destination to visit	0.2
Has hidden treasures	0.2
Is a good place to experience Native American or Western culture	0.2
Has lots of lakes and shorelines	0.2
Is not welcoming to everyone	-0.2

The major activity that seems to bring visitors from Springfield is gambling. There is also some interest in restaurants and nightlife, as well as Route 66.

Springfield	Participate	Motivate	Net
Gambling	37%	79%	29%
Restaurants or active nightlife	42%	41%	17%
Route 66	21%	82%	17%
Native American events or attractions	13%	86%	12%
Camping or RVing	10%	100%	10%
Attractions like zoos, theme parks, etc.	13%	71%	10%
Scenic drives or scenic areas	21%	45%	10%
Shopping	21%	45%	10%

It is positive to note that for both markets, those who have seen the advertising are significantly more likely to indicate that they will visit the state in the next year. This suggests that these markets offer additional potential.

Likelihood to Visit	No Ad Recall	Saw Advertising
Springfield	13.9%	22.8%
Fort Smith	40.6%	54.4%

*These two markets are both similar and different – they had the same increment of travel and the same ROI. And in both cases, the media expenditures did not generate a high level of recall, even though the costs were relatively high. These findings suggest that there is potential in these markets, but that lower awareness hindered the total impact. By increasing the recall, this would lead to more incremental travel. At the same time, these markets are not the most promising for OTRD. With the current cost per aware household and increment, bringing recall up to the average would cost about \$26,000 and would only generate about \$500,000 in additional direct spending. It may make sense to dedicate resources to other markets before trying to increase recall in these two markets.*



# In-State Under-Performing Markets

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There are two markets where there was no incremental travel – and these were two markets that are basically in-state – Tulsa and Sherman/Ada. The key problem in these markets seems to be that they are saturated – the level of travel is so high that it is difficult to generate any additional travel through advertising. As there were no incremental trips, there was no economic impact or return on investment. More importantly, both of these markets performed well two years ago, so it is worth determining why they are no longer doing as well.

Market	Size	Awareness	Aware Households	Increment	Trip Expenditures	ROI
<b>Tulsa, OK</b>	419,431	68.5%	287,301	0%	\$327	\$0
Comparison	7.9%	108	3.1%	0	73	0
<b>Sherman, TX/Ada, OK</b>	100,660	78.5%	78,976	0%	\$465	\$0
Comparison	1.9%	123	2.3%	0	103	0

Besides the high levels of visitation in these markets, there are high levels of familiarity. Residents in these markets know about Oklahoma, and they are traveling in the state. The challenge is whether the advertising can persuade this audience to visit even more.

Market	Visitation Index	Familiarity Index
<b>Tulsa, OK</b>	172	137
<b>Sherman, TX/Ada, OK</b>	165	119

In considering whether there is an opportunity to generate more travel, it is useful to look at the competitive situation. For Tulsa residents, Oklahoma is the most popular state for travel, but there is a lot of travel to Missouri, Texas, and Arkansas. This suggests that people in Tulsa feel they have a lot of travel options.

Residents of Sherman/Ada are in a DMA that straddles Oklahoma and Texas, and they are most likely to visit Texas. But they also report high levels of visitation to Oklahoma. Yet compared to two years ago, travel to Oklahoma has fallen substantially (67% of the respondents last time reported a trip to Oklahoma). This suggests that their travel preferences have changed, and this is part of the problem.

At the same time, Oklahoma City performed well and reports an overall higher level of visitation than these two markets (53% of the OKC residents reported an in-state trip), so there may still be the opportunity to influence these markets.

State Visited	Tulsa	Sherman/Ada
<b>Oklahoma</b>	<b>47%</b>	<b>45%</b>
Missouri	32%	12%
Texas	27%	64%
Arkansas	22%	19%
Kansas	20%	14%
Colorado	8%	10%
None of these	6%	0%
Louisiana	4%	14%
New Mexico	4%	12%
Nebraska	2%	0%

Yet, when both visitation and likelihood to visit are reviewed, those who saw the advertising are more negative. This suggests that the advertising message is not influencing them in a positive way.

	Visitation		Likelihood to Visit	
	No Ad Recall	Saw Ads	No Ad Recall	Saw Ads
Tulsa	43.9%	42.4%	80.6%	78.4%
Sherman/Ada	33.3%	40.0%	80.0%	70.4%

The advertising is reaching both markets, and they report well above average levels of advertising recall. Respondents in Sherman/Ada were especially aware of the online advertising, and the print. Therefore, increasing the media spending in these markets will not work. As with Oklahoma City, recall of the online ads is quite high, which suggests that message is more appealing to an in-state audience.

Media	Tulsa Recall	Tulsa Index	Sherman/Ada Recall	Sherman/Ada Index
Online	44%	104	72%	170
Print	18%	119	24%	158
Television	52%	106	57%	116
All advertising	68%	108	78%	123

It also doesn't seem that there is a major problem with the creative message. The ratings of the ads among residents in these markets are about average. But the message is clearly not motivating strong levels of interest.

Rating	Tulsa	Sherman/Ada
Make it seem like an appealing destination to visit	100	103
Make you want to find out more about traveling to or within Oklahoma	104	95
Make you want to visit the web site or call for more information	104	100
Make you want to visit Oklahoma for a leisure trip	100	102
Make it look like there are a lot of different things to do there	102	102
Show unexpected attractions or activities	101	101

The ads do seem to have an impact on the image that residents have of the state. In Tulsa, the ads seem to have the strongest influence in making consumers see the state as hip and progressive, modern and urban with lots of entertainment.

Tulsa	Image Impact
Is cool/hip	0.4
Is progressive	0.4
Has lots of entertainment & nightlife	0.4
Has lots of historical sites	0.3
Is exciting	0.3
Is modern	0.3
Is urban	0.3
Is an appealing destination to visit	0.3
Is dry and dusty	0.3
Is a good place to experience Native American or Western culture	0.3
Is interesting	0.3
Has plenty to do and see	0.2
Is great for the family	0.2
Is a good value	0.2
Has lots of shopping	0.2
Has hidden treasures	0.2
Has lots of lakes and shorelines	0.2

Only shows ratings +/- .2 or stronger

Perhaps this is the challenge, as the visitors from Tulsa report being motivated by scenery, state and national parks, and historic sites. Therefore, the ads may have a positive impact in *general*, but not focus on the specific activities that motivate additional travel. Another challenge with this market is that the motivators seem to be less focused. Since people know so much about the state they are able to travel for a number of different reasons – but this makes it more difficult to provide a focus and meaningful message.

Tulsa	Participated	Motivated	Net
Scenic drives or scenic areas	41%	53%	22%
State or national parks and recreation areas	25%	81%	20%
Historic sites or landmarks	29%	57%	16%
Restaurants or active nightlife	35%	41%	14%
Shopping	30%	42%	12%
Attractions such as museums	20%	57%	11%
Attended festivals or fairs	16%	71%	11%
Water activities	13%	86%	11%
Camping or RVing	10%	91%	10%
Route 66	21%	45%	10%

The impact of the advertising on Oklahoma’s image among those in Sherman/Ada is interesting. This is one case where the ads actually seem to reinforce some of the negative stereotypes. Those who saw the ads were more likely to agree that Oklahoma is too conservative and dry and dusty and less likely to agree that it has casinos, is hip or has unique events.

Sherman/Ada	Image Impact
Has lots of entertainment & nightlife	0.5
Is too conservative	0.4
Has a clean and unspoiled environment	0.4
Has hidden treasures	0.3
Is dry and dusty	0.3
Has lots of historical sites	0.3
Is exciting	0.3
Is a good place to experience Native American or Western culture	0.2
Is cool/hip	-0.2
Has lots of casinos	-0.2
Has unique events	-0.2
Has flat and uninteresting scenery	-0.3
Has lots of lakes and shorelines	-0.3

With residents in Sherman/Ada, gambling is the key activity that motivates travel, and it represents a third of the trips. Therefore the fact that the ads seem to have a negative impact on this perception is a problem. Otherwise there are some smaller groups of people that are motivated strongly by specific activities – Native American events, camping, water activities, attractions such as zoos/theme parks, and ethnic events or attractions. All of these were key motivators for smaller groups of visitors. This suggests that the state’s advertising may be augmented by either local advertising, or ads for specific events that are influencing travel.

Sherman-Ada	Participated	Motivated	Net
Gambling	42%	75%	32%
Quaint attractions or small towns	37%	29%	11%
Native American events or attractions	11%	100%	11%
Camping or RVing	11%	100%	11%
Water activities	11%	100%	11%
Attractions like zoos, theme parks, etc.	11%	100%	11%
Scenic drives or scenic areas	42%	25%	11%

***These markets represent a challenge for OTRD. Tulsa is a large market and has performed well in the past. But there is already a great deal of travel from this market within the state, and therefore it is difficult to generate more. The current advertising has a positive impact, but perhaps not in a way that influences travel. It might make sense to focus the ads that promote the scenery of the state in this market. The Sherman/Ada market is small, and the state spends very little in this market. Given these findings, it probably makes sense to reallocate those dollars to other markets, where there is more opportunity. The current ads don’t have as strong a positive impact as desired, and it is likely that specific advertising for the gambling sites in the state can retain travel from this market.***

# Conclusions & Recommendations

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- The major issue this past year was the condition of the economy and how it impacted travel and travelers' decisions. This research reinforced other findings and indicated that people took fewer trips in 2009. As a result, within the markets targeted, travel to Oklahoma was down about 3 percentage points, or 10%. Yet, even when travel is down, the advertising and marketing efforts made by OTRD could have helped lessen the impact of other negative factors. So this research focused on the impact of OTRD's efforts and the trips that came to Oklahoma that would not otherwise have occurred.
- The research in the targeted advertising markets measured non-responders instead of just responders. This measure showed that 64% of the people in these markets, or 3.3 million households, recalled some element of the OTRD advertising effort. This is up slightly from 2007, as a result of increased media expenditures even though traveling households declined.
- The research also determined the level of additional travel that occurred among those with ad recall – the incremental travel that would not have happened without the advertising. This indicated that there were 229,000 additional trips generated through the advertising, in these key markets.
- In terms of responses and conversion, the findings were mixed. Responses decreased 15% over 2007, while conversion and the influenced conversion increased. For this research the impact of those responders outside the targeted markets was considered and added to the impact among the general population where advertising ran. The result is an additional 50,000 trips from outside the targeted markets influenced by the marketing efforts.
- By combining the Conversion and Advertising Effectiveness research, an overall measure of the impact of the campaign can be calculated. This measure shows that more than 283,000 additional trips were generated to Oklahoma by the advertising and that this represented \$148 million in direct spending for a media investment of \$2.5 million. This means that the campaign generated an ROI of \$59.
- The advertising actually had a strong impact this year in part due to the uncertain economic conditions. The level of impact increased this year, as consumers faced uncertainty. The findings suggest that the impact of the economic situation would have been negative if not for OTRD's advertising and marketing efforts.

■ The research measured the impact of the various media in generating both ad recall and travel to the state:

- Overall, the reach of the campaign was good. SMARI has developed national benchmarks based on the evaluation of destination advertising and OTRD's advertising performance significantly exceeded the projected advertising reach.
- Once again, television was a key medium in generating recall and created the strongest impact on visitation. It was the most efficient in generating additional travel to the state and should continue to be the lynchpin of the marketing.
- The online advertising performance also performed extremely well. Not only did it generate strong awareness with creative similar to the television the online ads had similar impacts overall.
- Recall of the print elements of the campaign fell. Many destinations are cutting their print efforts, as it is harder to reach consumers efficiently with this medium. Yet, this year the print component was the most efficient for OTRD in terms of cost to reach a target household.
- The strong performance of both TV and online efforts resulted in significant media overlap which is consistently found to have greater impact on behavior. This layered approach should be continued.

■ The research gathered information on consumers' reactions to the marketing tools, including the advertising and the website.

- Ratings of the ad campaign were good and rival some of the stronger destination ads SMARI has tested. The ads not only had a strong impact in terms of generating visitation, but also improved consumers' image of the state.
- Consumers who visited the Oklahoma website were positive, and two-thirds found it "very" useful. The key information that consumers use on the site relates to attractions and events. Interestingly, there was less interest in deals.

■ The research also explored what people do when they visit the state and which activities are pre-planned. The activities that are planned in advance tend to be those that are critical elements of the trip. For Oklahoma key activities are scenery/scenic drives, gambling, restaurants and nightlife and historic sites. These should be key activities featured in the marketing and advertising.

■ Detailed analysis was conducted within the 12 target markets for OTRD. This analysis highlighted some overall considerations for evaluating markets and choosing future targets:

- ROI is not the best or sole measure for market selection. Larger markets generate more direct spending for the state – even when the ROI is not as favorable.
- Some of the larger markets are more distant from the state and therefore require a higher concentration of resources to generate awareness. Where this is occurring, such as Dallas/Fort Worth, the results are extremely strong. But where the awareness remains low, so does the direct impact and ROI.
- In general, OTRD should aim at generating at least 50% television advertising awareness to reach the desired level of density and interest to generate incremental travel in substantial levels.
- Markets that are both smaller and more distant hold much less potential, and therefore it might make sense to consolidate and move resources to dedicate them toward the larger markets.
- With in-state or border markets, saturation can be an issue. This doesn't mean that advertising is not necessary, as it is likely that other states would capture travel from these markets if Oklahoma didn't stay in the competitive mix. But in these markets the goal should be to maintain market share, or to utilize a more retail strategy that provides specific reasons to travel.

■ In considering the 12 markets, there are some key issues were uncovered:

- Dallas/Fort Worth is, by far, the most critical market in terms of overall performance. In 2009, Dallas generated about half the incremental trips and 60% of the direct spending. This market performed better in 2009 compared to 2007, and this may be due to the continued strong presence in the market. Yet, the performance also may have been influenced by the economy and more people looking for options closer to home. Regardless, this market remains the most important for OTRD in generating additional travel to the state.
- Kansas City and Little Rock are major markets that are located fairly far from the state. The size of these markets makes them important, but their ROI is below average. In part this seems to be because advertising



awareness is below average. If these markets are going to be targets, it is probably necessary to increase media expenditures fairly significantly.

- Wichita performed very strongly this year and had a strong ROI. There seems to be additional potential in this market, and it might make sense to increase media expenditures slightly. Yet, in 2007 there was no incremental travel from this market, so it may be that the economy was a factor, and that as it improves Wichita will not perform as well. But in the short term it seems a good market for investment.
- The in-state markets are hard to predict – in 2007 Tulsa performed well and Oklahoma City did not. But this year the opposite is true. OTRD needs to have some presence in these markets to help retain travel and to be competitive with other states that are trying to persuade Oklahoma residents to travel elsewhere, and this should be the goal in these markets.
- The other markets are much smaller, and performance varied significantly. Some of the smallest markets had the highest and lowest ROIs, although due to size the total economic impact was more limited. Generally the factors indicated above such as distance and existing levels of travel influenced the success in these markets. Due to competitive factors, the key activity drivers in these markets vary, and in some cases the advertising messages could be stronger. In these markets it may make sense to use targeted online or print efforts (such as newspaper) to focus on specific activities and messages that are drivers of visitation.

# Appendix – Ad Effectiveness Survey

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## Oklahoma Tourism Advertising Effectiveness September 2009

Thank you for visiting our travel survey. Your opinions are valuable to us!! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:

- For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
- If you need to go back to the preceding question to change your response, click on the *Previous* button.
- For some questions, you will need to scroll down to respond to all the questions on a screen.
- To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. First, who in your household is primarily responsible for making decisions concerning travel destinations?

- 1... Yourself
- 2... Both yourself and a spouse or other adult
- 3... Spouse or another adult → THANK & TERMINATE

S2. Which of the following cities is closest to where you live?

- 1... Dallas/Fort Worth
- 2... Kansas City
- 3... Oklahoma City
- 4... Tulsa
- 5... Amarillo, TX
- 6... Wichita, KS
- 7... Fort Smith, AK
- 8... Joplin, MO
- 9... Little Rock, AK
- 10... Springfield, MO
- 11... Sherman/Dennison, TX or Ada/Ardmore, OK
- 12... Wichita Falls, TX or Lawton, OK

S3. Do you normally take at least one of the following types of trips per year:

- a leisure trip or vacation which involves at least one night's stay, or
- a daytrip for pleasure where you travel more than 50 miles from home?

- 1... Yes
- 2... No → TERMINATE

What is your zip code? \_\_\_\_\_

S4. What type of Internet connection do you have?

1. Dial up
2. Broadband

3. Don't Know

S5. Please take a moment to view the video clip and answer the question. (INSERT TEST AD) Were you able to view the video

1. Yes
2. No ← TERMINATE

1. How many vacation or leisure trips have you taken in 2009?

\_\_\_\_\_ IF 0, SKIP TO Q4.

2. All combined how many nights away from home did you stay on those trips? \_\_\_\_\_

3. Please indicate which of the following states, if any, that you traveled to or within on those trips in 2009. Mark all that apply.

- 1... Arkansas
- 2... Colorado
- 3... Kansas
- 4... Louisiana
- 5... Missouri
- 6... Nebraska
- 7... New Mexico
- 8... Oklahoma
- 9... Texas
- 10... None of These

4. Thinking about your leisure travel in the past 12 months, did you....

- Take more leisure trips
- Take fewer leisure trips
- Take about the same number of leisure trips

5. Thinking about this last leisure trip, did any of the following apply?

- You chose a destination that was closer to home than normal
- You decided to take a trip that was shorter than normal
- You spent less on your trip than normal
- You stayed with friends or family instead of using paid accommodations as you normally would
- You chose to drive rather than fly as you would normally

SC1. The term "staycation" is used when a family or individual either stays in his or her immediate area or takes a daytrip to a nearby attraction rather than taking a longer trip. In the last 12 months did you take a "staycation"?

1. Yes
2. No ← **SKIP TO Q5**

SC2. Was this something you did....

- 1 . More this year than in the past
- 2 . Same as in the past
- 3 . Or less this year than in the past?

6. Please indicate how familiar you are with each of the following states in terms of what they have to offer for a leisure or non-business trip.

	<i>Not at all Familiar</i>	2	3	4	5 <i>Extremely familiar</i>
Arkansas					
Colorado					
Kansas					
Louisiana					
Missouri					
Nebraska					
New Mexico					
Oklahoma					
Texas					

7. During the remainder of 2009, how likely are you to take a leisure trip involving an overnight stay or a daytrip for leisure travel to or within each of the following states?

	<i>Not at all likely</i>	<i>Not very likely</i>	<i>Somewhat likely</i>	<i>Very likely</i>	<i>Already Planning a trip</i>
Arkansas					
Colorado					
Kansas					
Louisiana					
Missouri					
Nebraska					
New Mexico					
Oklahoma					
Texas					

8. During the next year, how likely are you to travel to or within each of the following states?

	<i>Not at all likely</i>	<i>Not very likely</i>	<i>Somewhat likely</i>	<i>Very likely</i>	<i>Already Planning a trip</i>
Arkansas					
Colorado					
Kansas					
Louisiana					
Missouri					
Nebraska					
New Mexico					
Oklahoma					
Texas					

9. Overall, how would you rate each state as a place to visit for a leisure trip?

	1 Excellent	2	3	4	5 Poor
Arkansas					
Colorado					
Kansas					
Louisiana					
Missouri					
Nebraska					
New Mexico					
Oklahoma					
Texas					

NOTE TO PROGRAMMER: HAVE THEM RATE OKLAHOMA AND ONE OTHER STATE WITH THE SAME FAMILIARITY AS OK IN Q6

10. Please consider the following statements concerning [INSERT STATE]. Indicate how much you agree with each statement by marking a number on the 5 point scale, where the more you agree with the statement, the higher the number. A rating of 5 means that you *strongly agree* with the statement; a 1 means you *strongly disagree*. You can use any number from 1 to 5.  
ROTATE ATTRIBUTES

	<i>Strongly disagree - 1</i>	2	3	4	<i>Strongly agree - 5</i>
... is an appealing destination to visit.					
... has a clean and unspoiled environment					
... has lots of lakes and shorelines					
... is dry and dusty					
... has flat and uninteresting scenery					
... is a good place to experience Native American or Western culture					
... offers many opportunities for outdoor activities					
... is urban					
... has plenty to do and see					
... is a good value					
...has hidden treasures					
... is cool/hip					
...is great for the family					
... has lots of historical sites					
... is interesting					
...is modern					
...has natural beauty					
...is progressive					
...has unique events					
...is exciting					
...has little to do					
...has lots of casinos					
...has lots of shopping					
...has lots of entertainment & nightlife					
...is restful/relaxing					
...is not welcoming to everyone					
...is too conservative					
...doesn't seem like a place to take a vacation					

IF Q3\_8=1 (VISITED OKLAHOMA), ASK 11 - 23; IF q3\_8=0, SKIP TO Q24  
Now we'd like to ask about your travel to Oklahoma.

11. How many leisure trips did you take to or within Oklahoma in 2009? \_\_\_\_\_
12. Had you traveled to or within Oklahoma for a leisure trip in the past five years, prior to 2009?
- 1... Yes  
2... No

13. In 2009, in what month(s) did you travel for leisure to or within Oklahoma? Mark all that apply.

- January 2009
- February 2009
- March 2009
- April 2009
- May 2009
- June 2009
- July 2009
- August 2009
- September 2009
- October 2009
- November 2009

14. Thinking about your overall travel experience in Oklahoma, would you say it was..

- 1...Excellent
- 2...Very Good
- 3...Good
- 4...Fair
- 5...Poor

15. Thinking about your trip to Oklahoma in [INSERT MONTH FROM Q13; IF MORE THAN ONE SELECTED, CHOOSE MOST RECENT], how far in advance did you start planning this trip?

- Less than one week
- One to two weeks
- Two to three weeks
- Three to four weeks
- 1 – 2 months
- 3 – 4 months
- More than 4 months
- Don't know

16. How many *nights* did you spend in Oklahoma on that [INSERT MONTH] trip? \_\_\_\_\_

17. Including you, how many people went on this trip to Oklahoma? \_\_\_\_\_

(IF q17=1, SKIP to q20)

18. How many were children 18 years or younger? \_\_\_\_\_

19. With whom did you travel...

- Spouse / significant other
- Child(ren)/Grandchild(ren): age 0–12
- Child(ren)/Grandchild(ren): age 13+
- Other Family
- Friends/Acquaintances
- None of the Above

20. What was the main purpose of your last leisure trip to or within Oklahoma? Please select only one.
- Visit family and friends
  - Visit a specific attraction \_\_\_\_\_
  - Attend a specific event \_\_\_\_\_
  - Family vacation
  - Participate in outdoor recreation
  - Business trip
  - Conference or convention
  - Combined Business & Pleasure
  - Other (SPECIFY) \_\_\_\_\_
21. Which of the following activities did you participate in as a part of your trip to Oklahoma? Mark all that apply.
- Historic sites or landmarks
  - Arts or cultural events
  - Native American events or attractions
  - Other ethnic events or attractions
  - Scenic drives or scenic areas
  - State or national parks and recreation areas
  - Quaint attractions or small towns
  - Gambling including casinos, racetracks and high-stakes Bingo
  - Camping or RVing
  - Water activities such as boating, swimming or fishing
  - Restaurants or active nightlife
  - Shopping such as at a mall, antique shop, etc.
  - Attended Festivals or fairs
  - Attractions such as museums
  - Participate in sporting events or tournaments such as golf, baseball, basketball, soccer, softball, tennis, horse shows, etc.
  - Watch sporting events (Thunder, Redhawks, Drillers, college football or basketball, etc.)
  - Go to a concert, theatre, ballet or other performance
  - Route 66
  - Attractions like zoos, theme parks, etc.
  - None of these
22. ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK: Which of these activities did you plan prior to your trip and which did you decide to participate in or visit once your trip had started?

23. **(SKIP TO Q25 IF Q16 = 0)** Which of the following describes the type of accommodations you stayed in, while traveling in Oklahoma? Mark all that apply.
- Hotel or Motel
  - Bed & Breakfast or Inn
  - Cabin, or Cottage
  - Timeshare
  - Campground or RV park
  - Resort
  - Condominium
  - Home of family or friend
  - Other, SPECIFY \_\_\_\_\_
24. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your trip to Oklahoma. Please estimate your travel party's total spending on each of the following and enter the amounts in whole dollars in the boxes provided.
- a. Lodging \_\_\_\_\_
  - b. Restaurant meals/Food/Groceries \_\_\_\_\_
  - c. Entertainment (shows/theater/concerts/sports events, etc.) \_\_\_\_\_
  - d. Shopping/souvenirs \_\_\_\_\_
  - e. Transportation (Airfare, car rental, gasoline) \_\_\_\_\_
  - f. Attractions (admission costs) \_\_\_\_\_
  - g. Other (recreation such as boat rental, golf fees, etc) \_\_\_\_\_

When you think about planning trips....

25. How many times in the past six months have you or other family members used the Internet to locate information about travel destinations? \_\_\_\_\_
26. How many times in the past six months have you or other family members used the Internet to book (INSERT)?
- A. Hotel rooms
  - B. Airline reservations
  - C. Rental cars
  - D. Vacation packages
27. In the past few months did you visit this Oklahoma website, [www.travelok.com](http://www.travelok.com)?
- 1. Yes
  - 2. No →SKIP TO IMAGE BEFORE Q30
28. Did you visit the Oklahoma website....
- 1. Before you decided to visit Oklahoma
  - 2. After you had already decided to visit Oklahoma
29. Which of the following website features did you use?

Places to stay
Places to eat or restaurants
Things to do or attractions
Events calendar
Itineraries or trip suggestions
Discounts or special offers
Maps or directions



## INSERT VISUAL OF OK VISITORS GUIDE

I:\Ads - Master\Oklahoma\2009\SpringNPInsert\_Page\_1.jpg

30. In the past few months did you request this Oklahoma Travel Guide?
1. Yes
  2. No → SKIP TO INSTRUCTION BEFORE Q32
31. Did you request the Oklahoma Travel Guide....
1. Before you decided to visit or vacation in Oklahoma
  2. After you had already decided to visit or vacation in Oklahoma

## ADS

Now we would like you to view some different forms of advertising. You will be seeing a variety of television, print and online ads. For the print ads, you will be asked to indicate if you have seen the ad before or not.

Please take a look at the following print ads and answer the corresponding questions.

### Online

chickTrip\_300x250\_Right.swf  
okc\_300x250\_Right.swf  
rt66\_300x250\_Right.swf  
statewide\_300x250\_Right.swf  
tulsa\_300x250\_Right.swf

32. Have you seen this online ad before?
3. Yes
  4. No

### Print

UNI\_OT-J204 WmnsDay-Coop-Crop.jpg

33. Have you seen this print ad before?
1. Yes
  2. No

### TV

OKC (SHOW ALL MARKETS)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV1-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV1-1.wmv)  
[mms://sms7.omniproductions.net/smc/OK09\\_OKTV1-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV1-1a.wmv)

Chick Trips (SHOW If S2 = 1, 2, 3, 4, 5, 6, 7, 8, 9 10, ~~11, 12~~)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV2-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV2-1.wmv)  
[mms://sms7.omniproductions.net/smc/OK09\\_OKTV2-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV2-1a.wmv)

Statewide (SHOW IF S2 = 1, 2, 3, 4, 5, 6, ~~7~~, 8, ~~9~~, 10, 11, 12)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV3-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV3-1.wmv)  
[mms://sms7.omniproductions.net/smc/OK09\\_OKTV3-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV3-1a.wmv)

Western (SHOW If S2 = 7 or 9)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV4-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV4-1.wmv)  
[mms://sms7.omniproductions.net/smc/OK09\\_OKTV4-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV4-1a.wmv)

Tulsa (SHOW If S2 = 1, 2, 3, 4, ~~5~~, 6, 7, 8, 9, 10, 11, 12)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV6-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV6-1.wmv)  
[mms://sms7.omniproductions.net/smc/OK09\\_OKTV6-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV6-1a.wmv)

Rt 66 (SHOW If S2 = 1, 2, 3, 4, 5, ~~6,7~~, 8, ~~9~~, 10, ~~11,12~~)  
 mms://sms7.omniproductions.net/smc/OK09\_OKTV7-1.wmv  
 mms://sms7.omniproductions.net/smc/OK09\_OKTV7-1a.wmv

34. How many times have you seen this ad before?

- 1... Never
- 2... Once
- 3... More than once

35. Based on the message you get from the ads you just viewed, please indicate how much these Oklahoma ads ...

	<i>Not at all - 1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>Definitely - 5</i>
...make it seem like an appealing destination to visit.					
...make you want to find out more about traveling to or within Oklahoma					
...make you want to visit the Web site or call for more information.					
...make you want to visit Oklahoma for a leisure trip					
...make it look like there are a lot of different things to do there					
...show unexpected attractions or activities.					

DEMOGRAPHICS

The following questions are for classification purposes only so that we may group your responses with those of others.

D1. Are you ...  
 1... Male  
 2... Female

D2. Which of the following best describes your ethnic heritage?  
 1... African American  
 2... Asian American  
 3... Caucasian  
 4... Hispanic/Latin American  
 5... Mixed ethnicity  
 6... Native American  
 7... Other

D3. Are you currently ...?  
 1... Married  
 2... Divorced  
 3... Widowed  
 4... Single/Never married

D4. Including yourself, how many people live in your household? \_\_\_\_\_

D5. How many children under the age of 18 live in your household?

D6. Which of the following categories represents the last grade of school you completed?

- 1 .....High school or less
- 2 .....Some College/Technical school
- 3 .....College graduate
- 4 .....Post graduate degree
- 5 .....REFUSED/NO ANSWER

D7. Which of the following categories best represents your total annual household income before taxes?

- 1... Less than \$20,000
- 2... \$20,000 but less than \$35,000
- 3... \$35,000 but less than \$50,000
- 4... \$50,000 but less than \$75,000
- 5... \$75,000 but less than \$100,000
- 6... \$100,000 or more

D8. What is your age? \_\_\_\_\_

Thank you for completing our survey!

# Appendix – Conversion Survey

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## **OKLAHOMA TOURISM & RECREATION**

### ***Conversion Study Questionnaire***

*September 2009*

**PHONE INTRO:** Hello, I'm from Strategic Marketing & Research and I'm calling on behalf of the Oklahoma Tourism Department. We are conducting a short study today/tonight regarding travel and tourism. This study is for research purposes only, and no sales call will result. We'd like to include your opinions.

**WEB INTRO:** Thank you for participating in our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

S1. Our records indicate that you or someone in your family requested information about Oklahoma. Are you the person who requested the information?

1. Yes
2. No ← **ASK FOR REQUESTOR**

(REINTRODUCE YOURSELF IF NECESSARY)

1. What states have you traveled to or within for either business or leisure trips since the beginning of 2009? [DO NOT READ]

- 1 .....ARIZONA
- 2 .....ARKANSAS
- 3 .....CALIFORNIA
- 4 .....COLORADO
- 5 .....FLORIDA
- 6 .....KANSAS
- 7 .....LOUISIANA
- 8 .....MISSOURI
- 9 .....NEVADA
- 10 .....NEW MEXICO
- 11 .....NEW YORK
- 12 .....OKLAHOMA
- 13 .....TENNESSEE
- 14 .....TEXAS
- 15 .....VIRGINIA
- 16 .....None of these

2. [TO THOSE MENTIONED IN Q1 ASK] How many of those trips from 2009 were the following:

PULL IN STATES IN Q1	BUSINESS	LEISURE OVERNIGHT	DAYTRIP
MAKE NUM BOX IN TABLE	[ ]	[ ]	[ ]

3. Thinking about your leisure travel in the past 12 months, did you....

- Take more leisure trips
- Take fewer leisure trips
- Take about the same number of leisure trips

4. Thinking about this last leisure trip, did any of the following apply?

- You chose a destination that was closer to home than normal
- You decided to take a trip that was shorter than normal
- You spent less on your trip than normal

- You stayed with friends or family instead of using paid accommodations as you normally would?
- You chose to drive rather than fly as you would normally
- SC1. The term "staycation" is used when a family or individual either stays in his or her immediate area or takes a daytrip to a nearby attraction rather than taking a longer trip. In the last 12 months did you take a "staycation"?
3. Yes
4. No ← **SKIP TO Q5**
- SC2. Was this something you did....
- 4 . More this year than in the past
- 5 . Same as in the past
- 6 . Or less this year than in the past?
5. Including any recent trips we may have already discussed, how many times in the past 5 years have you traveled to or within Oklahoma for...
- BUSINESS TRIP \_\_\_\_\_
- LEISURE TRIP \_\_\_\_\_
6. **(IF TRAVELED TO OK IN Q1 & NOT OK BUSINESS ONLY AT Q2 ASK)** Thinking of all your 2009 leisure trips to Oklahoma, what were the purposes of your visits? **(READ LIST; CHECK AS MANY AS APPLY)**
- 1 .....to visit friends/family
- 2 .....to go to the lakes
- 3 .....to go camping
- 4 .....to attend a cultural event or festival
- 5 .....to go hunting/fishing
- 6 .....to visit urban areas
- 7 .....to visit a specific attraction **(SPECIFY)** \_\_\_\_\_
- 8 .....to go to a football or basketball game
- 9 .....Just driving through on our way elsewhere
- 10 .....Close place to get away to
7. During the past year did you see hear or read any advertising for Oklahoma as a place to visit?
- 1 .....Yes
- 2 .....No **(SKIP TO Q 10)**
8. **(IF Q7 = 1 - ASK)** Where did you see or hear the advertising? **(DO NOT READ LIST; ACCEPT MULTIPLE RESPONSE)**
- 1 .....TV
- 2 .....RADIO
- 3 .....MAGAZINES
- 4 .....INTERNET/WEB
- 5 .....OUTDOOR/BILLBOARDS
- 6 .....NEWSPAPER
- 7 .....DIRECT MAIL
- 8 .....OTHER (SPECIFY) \_\_\_\_\_
9. **(IF Q8 = MAGAZINES - ASK)** Can you recall in which magazines you saw advertising for Oklahoma? **(PROBE)** \_\_\_\_\_ **PRELIST IF POSSIBLE**

10. Did your household request and receive an Oklahoma Travel Guide this year?
- 1 .....Yes
  - 2 .....No **(SKIP TO Q12)**
  - 3 .....DON'T KNOW **(SKIP TO Q12)**
  - 4 .....REQUESTED BUT DIDN'T RECEIVE [DO NOT READ PHONE]
11. **(IF Q7=1 - ASK)** Did the advertising prompt you to order the travel guide?
- 1 .....Yes
  - 2 .....No
  - 3 .....DON'T KNOW
12. In the past 6 months, did you or anyone in your family use the Oklahoma Tourism Web site at [www.travelok.com](http://www.travelok.com)?
- 1.....Yes
  - 2.....No **(SKIP TO Q15)**
  - 3.....DON'T KNOW **(SKIP TO Q15)**
13. Overall would you say that the information on the Web site was...?
- 1.....Very useful
  - 2 .....Somewhat useful
  - 3 .....Not very useful
  - 4 .....Not at all useful
14. Why did you visit the Oklahoma website? \_\_\_\_\_

**IF NON-VISITOR (NOT OVERNIGHT LEISURE OR DAYTRIP), SKIP TO Q28**

15. **(ASK OF ALL VISITOR AND ONLY EXTRA ATTRIBUTES IF Q7=1 OR Q10=1 OR Q12=1)** In order to get a better understanding of what influenced you to visit the state I'd like you to rate several different considerations on a scale of 1 to 10 where 10 means it influenced you a great deal and 1 means it did not influence you at all. How much do you think (ATTRIBUTE) influenced your visit.
- [ ] your past experience ..... \_\_\_\_\_
- [ ] (IF Q7=1) the advertising you saw ..... \_\_\_\_\_
- [ ] the recommendations of friends or family ..... \_\_\_\_\_
- [ ] (IF Q10=1) the travel guide ..... \_\_\_\_\_
- [ ] an interest in native American history or culture ..... \_\_\_\_\_
- [ ] (IF Q12=1) the Oklahoma website ..... \_\_\_\_\_

**Now we would like to ask you some specifics regarding your most recent visit to or within Oklahoma.**

16. On your most recent business or leisure trip to or within Oklahoma, how many nights did you spend in the state? **RECORD NUMBER OF NIGHTS** \_\_\_\_\_
17. Thinking about this trip, how far in advance did you begin to plan?
- Less than one week
  - One to two weeks
  - Two to three weeks
  - Three to four weeks
  - 1 – 2 months
  - 3 – 4 months
  - More than 4 months
  - Don't know

18. In what month did you take your that most recent business or leisure trip to or within Oklahoma?

- .. January, 2009
- .. February, 2009
- .. March, 2009
- .. April, 2009
- .. May, 2009
- .. June, 2009
- .. July, 2009
- .. August, 2009
- .. September, 2009
- .. Other, specify \_\_\_\_\_

19. During your most recent Oklahoma trip, was your final destination Oklahoma or somewhere else?

- 1 .....Oklahoma as a business or leisure trip
- 2 .....Somewhere Else (SPECIFY: WHAT STATE?) \_\_\_\_\_
- 3 .....Live in Oklahoma

20. What were the primary cities or areas that you visited? **(DO NOT READ LIST – ACCEPT MULTIPLES)**

- .. ARBUCKLE AREA
- .. ARDMORE
- .. BARTLESVILLE
- .. BROKEN BOW
- .. CLAREMORE
- .. CLINTON
- .. DUNCAN
- .. ENID
- .. GRAND LAKE AREA
- .. GUTHRIE
- .. GUYMAN/WOODWARD/WESTERN OKLAHOMA
- .. LAKE TEXOMA AREA
- .. LAWTON
- .. PARKS, LAKES AND CAMPGROUNDS
- .. McALESTER
- .. MIAMI
- .. MUSKOGEE
- .. NORMAN
- .. OKLAHOMA CITY AREA
- .. PONCA CITY
- .. SHAWNEE
- .. STILLWATER
- .. TAHLEQUAH
- .. TULSA AREA
- .. OTHER (SPECIFY) \_\_\_\_\_

21. Did you visit or participate in any of the following on your most recent trip to or within Oklahoma.....
- ...Historic sites or landmarks
  - ...Arts or cultural events
  - ...Native American events or attractions
  - ...Other ethnic events or attractions
  - ...Scenic drives or scenic areas
  - ...State or national parks and recreation areas
  - ...Quaint attractions or small towns
  - ...Gambling including casinos, racetracks and high-stakes Bingo
  - ...Camping or RVing
  - ...Water activities such as boating, swimming or fishing
  - ...Restaurants or active nightlife
  - ...Shopping such as at a mall, antique shop, etc.
  - ...Attended Festivals or fairs
  - ...Attractions such as museums
  - ...Participate in sporting events or tournaments such as golf, baseball, basketball, soccer, softball, tennis, horse shows, etc.
  - ...Watch sporting events (Thunder, Redhawks, Drillers, college football or basketball, etc.)
  - ...Go to a concert, theatre, ballet or other performance
  - ...Route 66
  - ...Attractions like zoos, theme parks, etc.
  - None of these

22. **ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:** Which of these activities did you plan prior to your trip and which did you decide to participate in or visit once your trip had started?

23. **(IF NIGHTS > 0 AT Q16 ASK)** What kind of accommodations did you stay at while visiting Oklahoma for business or leisure? **(DO NOT READ LIST / ACCEPT MULTIPLE RESPONSES)**

- 1 .....HOTEL/MOTEL
- 2 .....INN/BED AND BREAKFAST
- 3 .....CABIN/COTTAGE
- 4 .....CAMPING
- 5 .....RESORT
- 6 .....CONDOMINIUM
- 7 .....STAYED WITH FAMILY/FRIENDS/PRIVATE RESIDENCE
- 8 .....OTHER, SPECIFY \_\_\_\_\_
- 9 .....DON'T KNOW/NO ANSWER
- 10 .....NONE/NO OTHER

24. Including yourself, how many people were on this trip to or within Oklahoma?

**RECORD NUMBER** \_\_\_\_\_

25. **(IF MORE THAN ONE PERSON, ASK)** Besides yourself, who else went on your trip? **(DO NOT READ LIST / ACCEPT MULTIPLE RESPONSES)**

- 1 .....SPOUSE
- 2 .....CHILDREN
- 3 .....OTHER FAMILY
- 4 .....FRIEND(S)
- 5 .....GROUP TOUR
- 6 .....OTHER
- 7 .....DON'T KNOW/NO ANSWER
- 8 .....NO ONE ELSE / SELF ONLY



26. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your most recent trip while in Oklahoma. Please estimate how much you spent in total on...? **(READ LIST / RECORD AMOUNT FOR EACH / IF UNCERTAIN, ASK FOR THEIR BEST GUESS/ENTER 9999 FOR DON'T KNOW/ REFUSED)**

- 26a. Lodging \_\_\_\_\_
- 26b. Meals/Food/Groceries \_\_\_\_\_
- 26c. Attractions \_\_\_\_\_
- 26d. Recreational expenses such as boat rental, golf fees etc. \_\_\_\_\_
- 26e. Novelties and Souvenirs \_\_\_\_\_
- 26f. Shopping \_\_\_\_\_
- 26g. Entertainment, e.g., shows, theater/concerts \_\_\_\_\_
- 26h. auto rental or flight costs \_\_\_\_\_
- 26i. Other \_\_\_\_\_

27. Now I would like you to rate your overall travel experience on your most recent trip in Oklahoma using any number from 1 to 5, where 1 means you had a poor experience and 5 means you had an excellent experience. Thinking about your overall travel experience in Oklahoma how would you rate it?

	1	2	3	4	5
	Poor				Excellent
Overall travel experience					

**ASK EVERYONE**

28. How likely are you to visit Oklahoma in the next year for a leisure trip?

- 1 .....Already planning a trip
- 2 .....Very Likely
- 3 .....Somewhat likely
- 4 .....Not very likely
- 5 .....Not at all likely

29. How likely are you to **ever** visit Oklahoma again for a leisure trip?  
**[ONLY VISITOR GETS THE WORD "AGAIN" – NON LEAVE OUT]**

- 1 .....Already planning a trip
- 2 .....Very Likely
- 3 .....Somewhat likely
- 4 .....Not very likely
- 5 .....Not at all likely

30. **(IF NON-VISITOR ASK)** Which of the following statements best describes why you did not travel to Oklahoma for a leisure trip? **(ACCEPT MULTIPLE MENTIONS)**

- 1 .....I chose another destination
- 2 .....I decided not to take any trip
- 3 .....I still intend to travel to Oklahoma at some future date
- 4 .....OTHER (SPECIFY)\_\_\_\_\_

**These last few questions are for classification purposes only so that we can group your responses with others that we have interviewed.**

31. What is your marital status? Are you...? **(READ LIST)**
- 1 .....Married
  - 2 .....Divorced
  - 3 .....Widowed
  - 4 .....Single/Never married
  - 5 .....REFUSED/NO ANSWER
32. Including yourself, how many people are currently living in your household? \_\_\_\_\_
33. **(IF MORE THAN ONE)** How many people living in your household are children under the age of 18? \_\_\_\_\_
34. Which of the following categories best represents the last grade of school you completed?
- 1 .....High school or less
  - 2 .....Some College/Technical school
  - 3 .....College graduate
  - 4 .....Post graduate degree
  - 5 .....REFUSED/NO ANSWER
35. What magazines, if any, do you regularly read? \_\_\_\_\_
36. What online sites do you regularly read? \_\_\_\_\_
37. Which of the following categories best represents the total annual income for your household before taxes?
- 1 .....Less than \$20,000
  - 2 .....\$20,000 but less than \$35,000
  - 3 .....\$35,000 but less than \$50,000
  - 4 .....\$50,000 but less than \$75,000
  - 5 .....\$75,000 but less than \$100,000
  - 7 .....\$100,000 or more
  - 8 .....DON'T KNOW
  - 9 .....REFUSED/NO ANSWER
38. Which of the following best describes your racial or ethnic heritage? Are you...
- 1 .....Caucasian/White
  - 2 .....African American
  - 3 .....Hispanic/Latin American
  - 4 .....Asian-American
  - 5 .....Native American
  - 6 .....Mixed ethnicity (DO NOT READ)
  - 7 .....Other
  - 8 .....REFUSED/NO ANSWER
39. Are you....
- 1 .....Male
  - 2 .....Female
40. What is your age? \_\_\_\_\_

# Appendix – Advertising

## Oklahoma Tourism & Recreation Department 2009 Advertisements

### Print



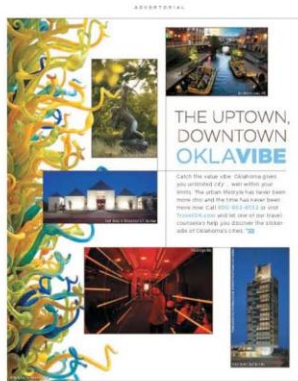
SpringNPIInsert\_Page\_1.jpg



SpringNPIInsert\_Page\_2.jpg



SpringNPIInsert\_Page\_3.jpg





## TV (:30)

### OKC

ON-RV7-OKCHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV1-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV1-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV1-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV1-1a.wmv)

### Chick Trips

ON-RV8-ChickTripsHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV2-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV2-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV2-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV2-1a.wmv)

### Statewide

ON-RV8-StatewideHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV3-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV3-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV3-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV3-1a.wmv)

### Western

ON-RV9-WesternHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV4-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV4-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV4-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV4-1a.wmv)

### Indian

ON-RV10-IndianHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV5-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV5-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV5-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV5-1a.wmv)

### Tulsa

ON-RV10-TulsaHD-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV6-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV6-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV6-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV6-1a.wmv)

### Rt 66

ON-RV13-Rt66HDrev-OT-J143.mov

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV7-1.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV7-1.wmv)

[mms://sms7.omniproductions.net/smc/OK09\\_OKTV7-1a.wmv](mms://sms7.omniproductions.net/smc/OK09_OKTV7-1a.wmv)



## Online




**OKLATRIVIA GIVEAWAY!**  
Answer for a chance to **WIN a TRIP!**  
How many Chick Trip itineraries can you find on TravelOK.com?  
■ 5-10 ■ 11-19 ■ 20+

**SUBMIT**

close X

The advertisement features a pink background on the left with white and yellow text. On the right, there is a photograph of a car with a red inflatable chick in the front seat. A 'close X' button is in the top right corner.

ChickTrip



**OKLATRIVIA GIVEAWAY!**  
Answer for a chance to **WIN a TRIP!**  
How many ecoregions does Oklahoma have?  
■ 4 ■ 19 ■ 11

**SUBMIT**

close X

The advertisement has a red background on the left with white and yellow text. The right side shows a photograph of a modern building interior with a large, colorful, abstract sculpture. A 'close X' button is in the top right corner.

OKC



**OKLATRIVIA GIVEAWAY!**  
Answer for a chance to **WIN a TRIP!**  
How many miles of Route 66 does Oklahoma have?  
■ 154 ■ 243 ■ 426

**SUBMIT**

close X

The advertisement has a green background on the left with white and yellow text. The right side shows a photograph of a large steel truss bridge structure. A 'close X' button is in the top right corner.

RT66



**OKLATRIVIA GIVEAWAY!**  
Answer for a chance to **WIN a TRIP!**  
How many lakes are in Oklahoma?  
■ 20 ■ 100 ■ 200

**SUBMIT**

close X

The advertisement has a blue background on the left with white and yellow text. The right side shows a photograph of a building with a large sign that says 'WIDE'S'. A 'close X' button is in the top right corner.

Statewide



**OKLATRIVIA GIVEAWAY!**  
Answer for a chance to **WIN a TRIP!**  
Where does Tulsa's art deco architecture rank nationwide?  
■ 1st ■ 5th ■ 9th

**SUBMIT**

close X

The advertisement has a yellow background on the left with white and black text. The right side shows a photograph of a couple in a ballroom, with the man dipping the woman. A 'close X' button is in the top right corner.

Tulsa