



2016 Tourism Advertising Accountability Research

November 2016

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Research Objective



- The purpose of this research was to provide *an evaluation of Oklahoma's tourism advertising in terms of:*
 - *Awareness of the advertising*
 - *The bottom line return on Oklahoma's investment in the campaign in terms of:*
 - *Incremental travel to Oklahoma*
 - *Incremental visitor spending in Oklahoma*
 - *Incremental state and local taxes*

Background



- Oklahoma advertising markets in 2016:
 - *Houston, TX, Dallas-Ft. Worth. TX, St. Louis, MO, San Antonio, TX, Kansas City, MO, KS, Austin, TX, Oklahoma City, OK, Little Rock-Pine Bluff, AR, Tulsa, OK, Wichita-Hutchinson. KS, Springfield, MO, Ft. Smith-Fayetteville-Springdale-Rodgers, AK, Amarillo, TX, and Wichita Falls-Lawton, TX, OK DMAs. A map follows on the next page.*
- Total advertising investment was approximately \$2.26 million
- Media used included TV, Online Video, Digital, and Print.

Oklahoma's 2016 Advertising Markets



Research Method



- The study was conducted among a representative sample of adult travelers residing in Oklahoma's advertising markets.
 - *'Travelers' mean respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years. (70% of those sampled met these requirements.)*
- The study was conducted online with a sample demographically balanced to represent the population in the markets surveyed.
 - *1,407 individuals participated in this research.*

Research Method (Cont'd)



- ◉ Questionnaire content included:
 - ◉ ***Travel to Oklahoma***
 - ◉ *Respondents reported trips they took to Oklahoma during and shortly after the advertising campaign.*
 - ◉ ***Advertising Awareness***
 - ◉ *Actual creative from the Spring/Summer 2016 campaign was exposed and respondents reported recall of each.*
 - ◉ *We use this forced exposure approach to ensure that we are measuring the Oklahoma's sponsored advertising only – not that of Oklahoma's attractions and accommodation facilities.*

Research Method (Cont'd)



◉ ROI calculation:

- ◉ *The **Longwoods R.O.EYE™** method quantifies the relationship between awareness of campaign elements and trip taking.*
- ◉ *A baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.*
- ◉ *Using the principles and techniques of experimental design, we control for the effects of internal and external factors that could otherwise influence the result, such as economic conditions, weather, prior visitation, etc.*

Advertising Impacts



- For the 2016 campaign, Oklahoma's advertised markets, awareness across all media was 52%. The awareness level increased 5% from 47% in 2015. For the individual media types, Digital and Online Video had the highest awareness at 37%. Print and Television awareness were slightly lower at 31%.
 - Among the individual media types, for the Digital ad awareness was similar for four of the six digital ads, with the travel guide and outdoor guide ads being lower.
 - Similarly, the two of the four Online Video ads had similar awareness, with the travel guide and outdoor guide ads being lower.
 - Each Print ads had similar awareness levels. Similarly, each of the Television had similar awareness levels.

Advertising Impacts (Cont'd)



- Based on Longwoods methodology, we estimate that the investment of \$2.26 million dollars generated in the short term, increasing:
 - *1.42 million new visitors to Oklahoma who would not otherwise have come, this up 16.3% from 2015*
 - *these incremental visitors spent approximately \$210 million in Oklahoma, this increased 2.6% from 2015*
 - *the incremental spending resulted in \$16.6 million in incremental state and local taxes up 7.1% from 2015 but still generating but with the same return on investment of 7:1*
 - *the incremental spending resulted in \$9.7 million in incremental state taxes or return on investment of 4:1 and \$6.9 million in incremental local taxes or a return on investment of 3:1.*

Advertising Impacts (Cont'd)



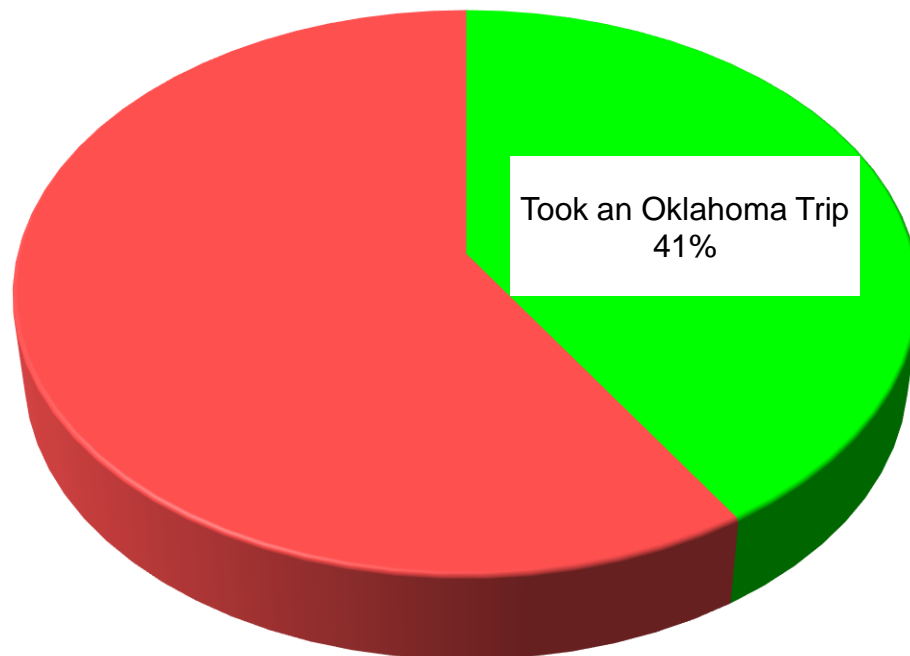
- In addition to the short term impacts, we estimate that the advertising influenced the planning of 1.22 million additional trips to Oklahoma in the next 12 months.
- While not all of these planned trips will actually happen, those that do will add to the return on Oklahoma's investment in tourism marketing.

Oklahoma Past Visitation & Intent

Took a Trip to Oklahoma Since January 1, 2016



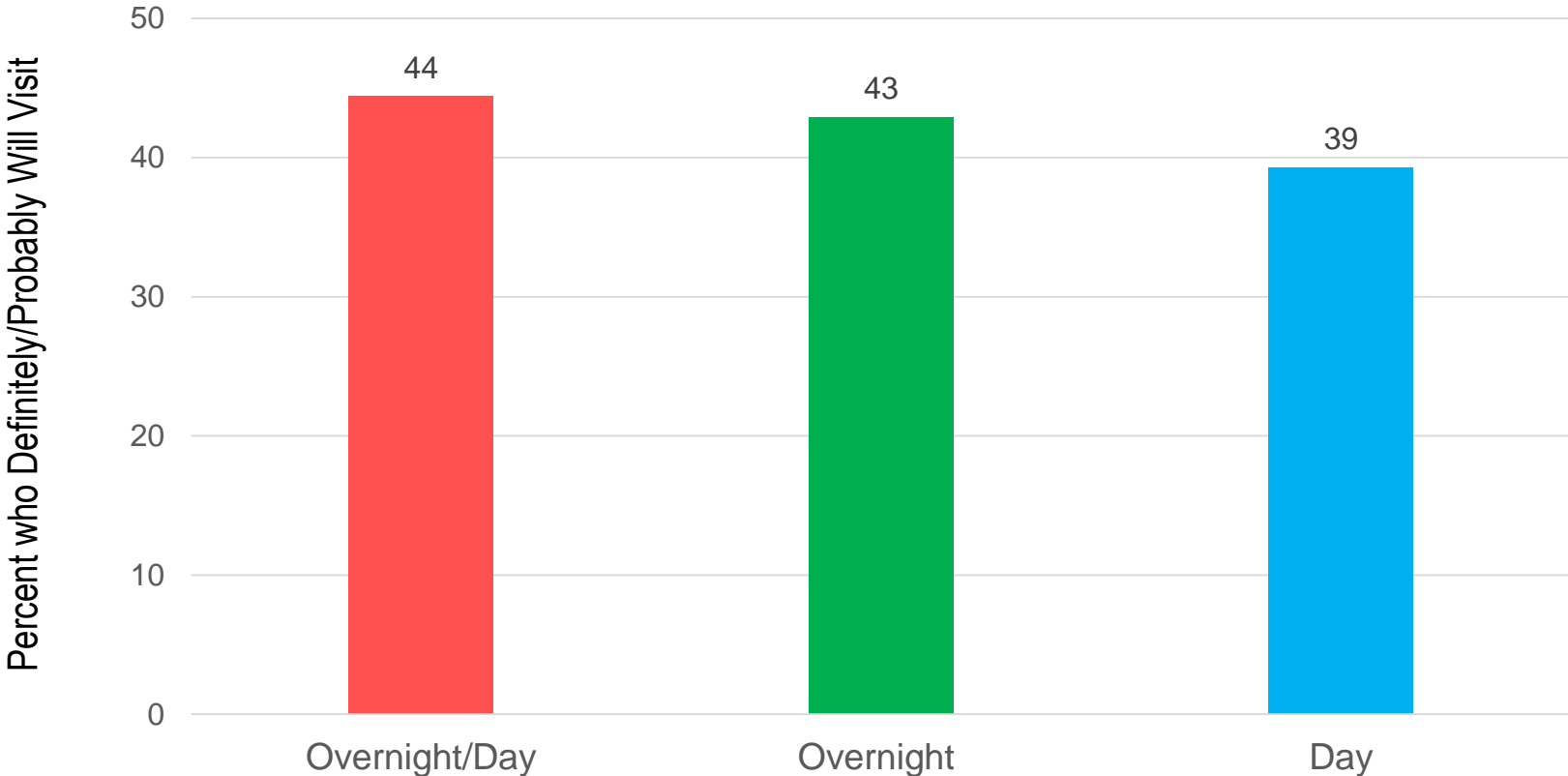
Base: Total Travelers



Intent to Visit Oklahoma in the Next Year



Base: Total Travelers

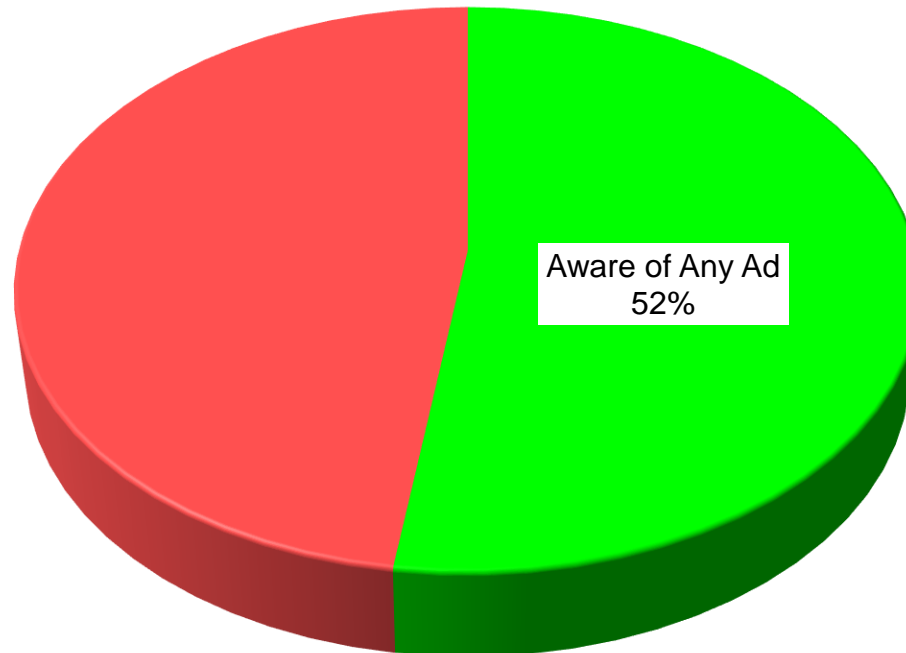


Advertising Awareness

Awareness of Oklahoma's Advertising



Base: Total Travelers

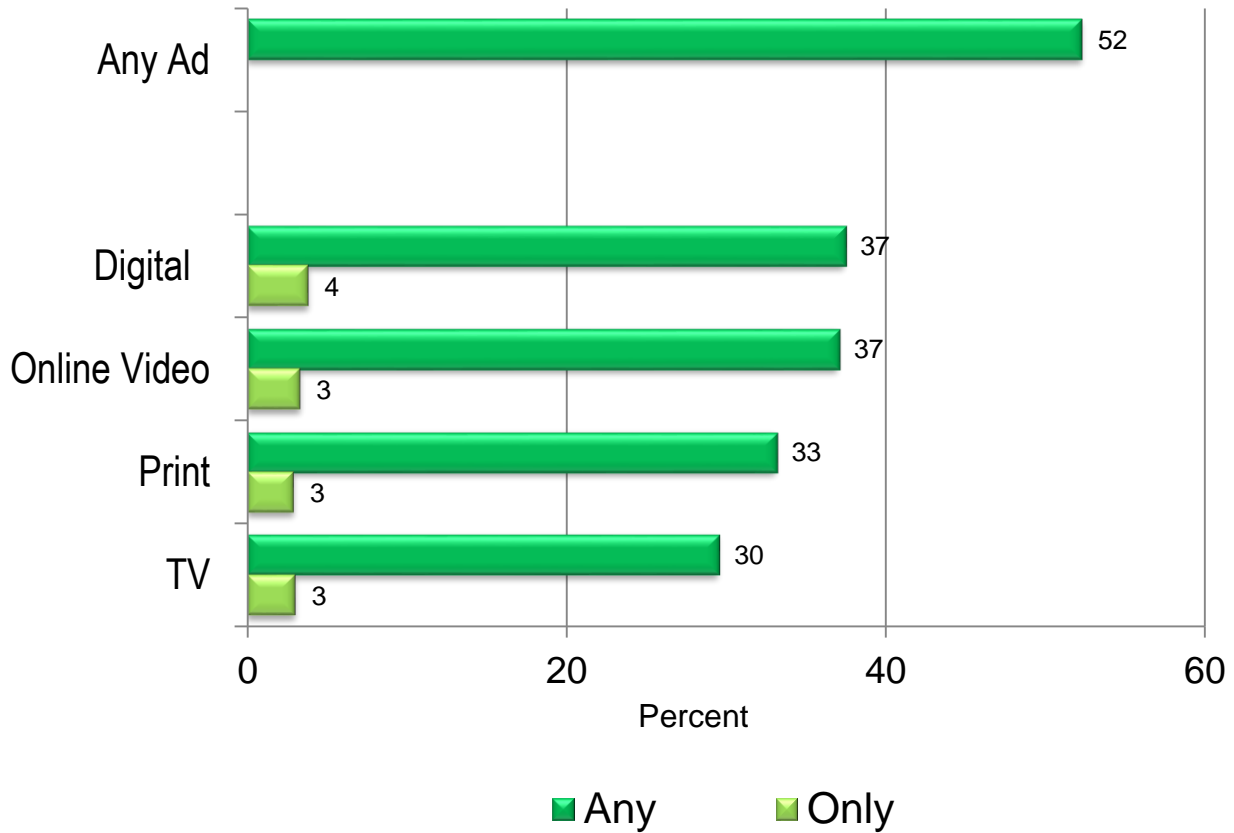


**Awareness level
is up 5% from
47% in 2015**

Awareness by Media



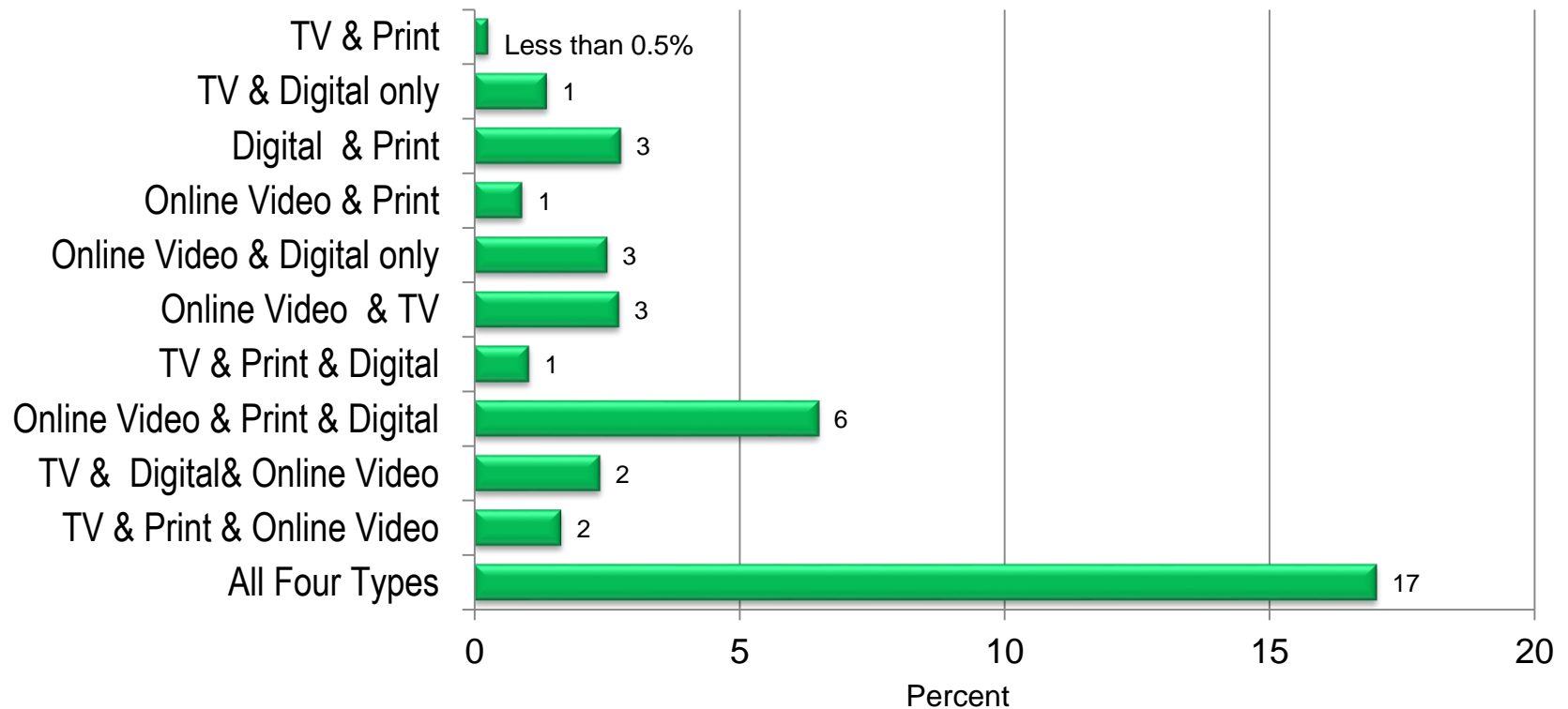
Base: Total Travelers



Awareness by Media Combinations



Base: Total Travelers



Digital Creative



Camping & Hiking



Kayaking & Lakes



Outdoor Guide



Travel Guide



Route 66 & State Parks



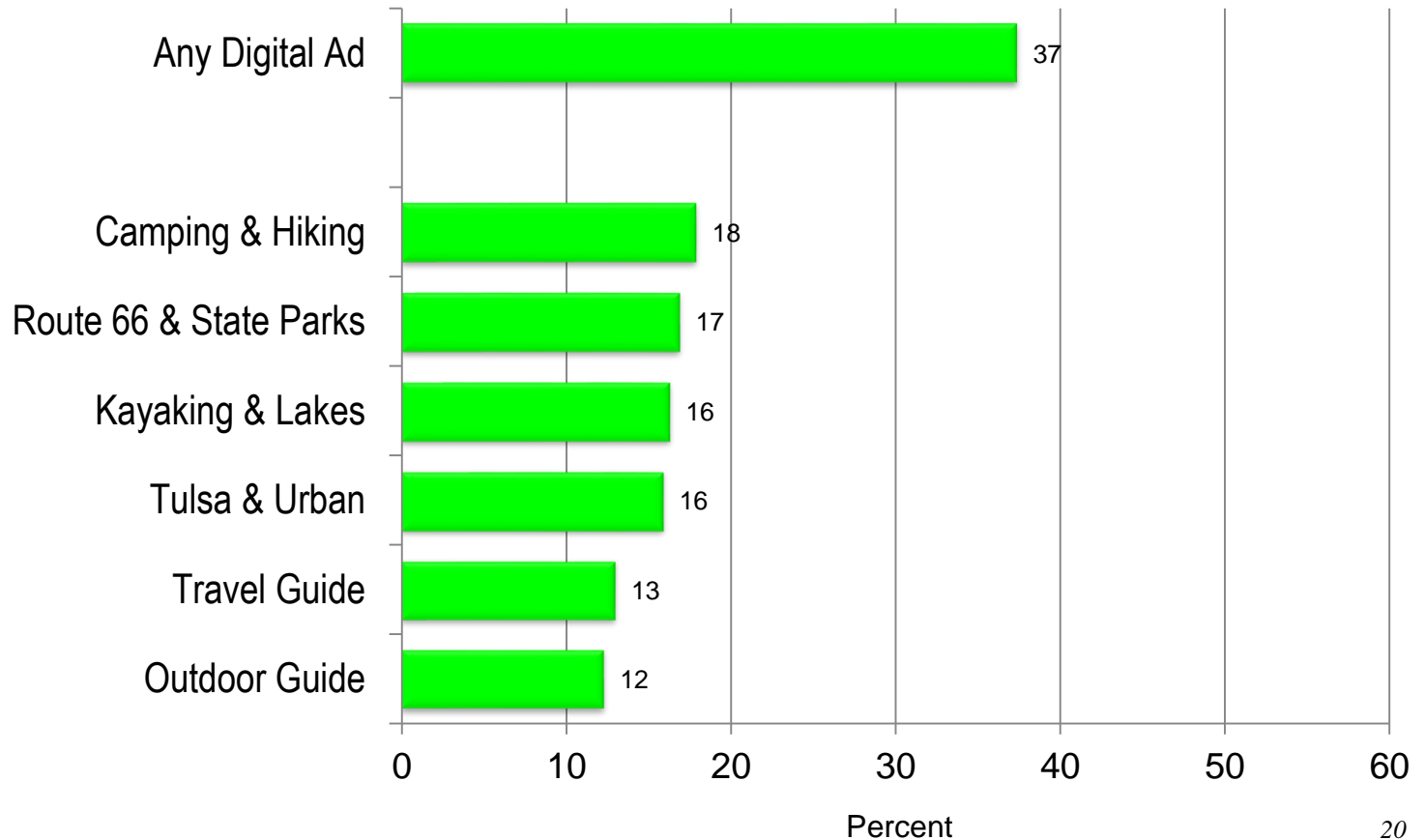
Tulsa & Urban



Awareness of Individual Ads – Digital



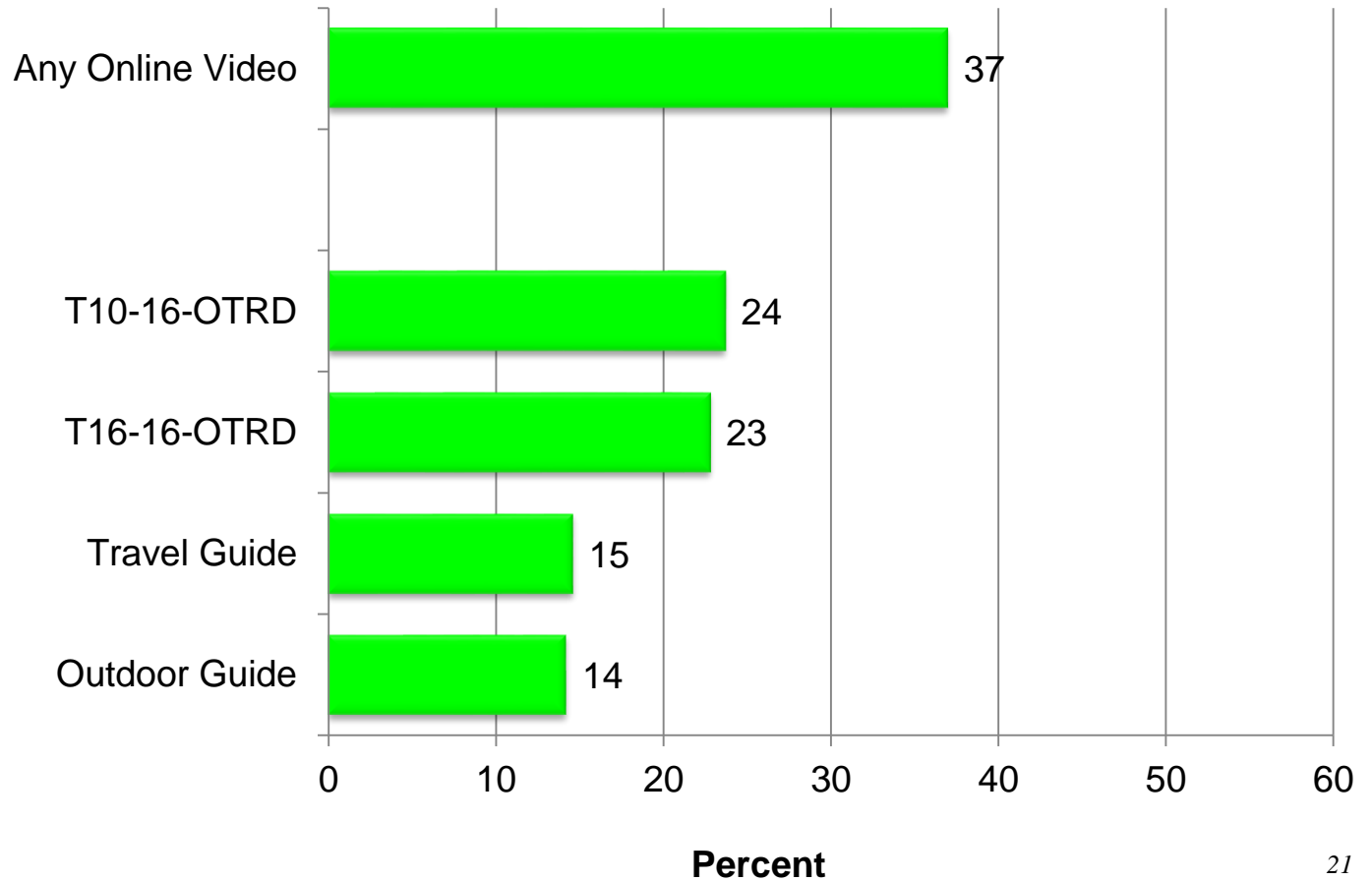
Base: Total Travelers



Awareness of Individual Ads – Online Video



Base: Total Travelers



Print Creative



Midwest Living/American Road

FAIRS, FESTIVALS & FEASTS. FIND THEM FIRST AT TRAVELOK.COM.

Oklahoma's got you covered when you round up more than 1000 annual festivals and events across the state. Celebrate spring at the Azusa Festival in Muskogee, enjoy more than 70,000 apples and cider at the Okfusco Festival in Okfusko, enjoy live music and beer at OKC's Big City Festival, and more. Find your favorite festival, fair, or feast at TRAVELOK.COM. Discover what's happening at TRAVELOK.COM/EVENTS.

AAA Texas/AARP

FAIRS, FESTIVALS & FEASTS. FIND THEM FIRST AT TRAVELOK.COM.

ADVENTURE'S JUST ACROSS THE BORDER. TO BE EXACT.

Visit your friendly neighbors just north of the Red River. We can't wait to see you at more than 1,000 festivals and events statewide. Kick off summer at the State and Straps Beer Festival. Grab a sweet slice of paradise at the Watermelon Festival in Bush Springs. Indulge your senses with barbecue and Pizoz at Tulsa's acclaimed Oktoberfest. Or wander in winter's most beautiful light displays.

Join the party at TRAVELOK.COM. We'll keep an eye out for you.!

State of Success



Missouri Life/AAA Home & Away

IN OKLAHOMA, EVERY SEASON IS FESTIVAL SEASON.

Discover a treasure of art and culture at festivals across Oklahoma. From the Western Oklahoma Fair and Rodeo to the Tulsa World Beer Festival, there's something for everyone. Find your favorite festival, fair, or feast at TRAVELOK.COM. Discover what's happening at TRAVELOK.COM/EVENTS.

TRAVEL BOLDLY. TRAVEL ADVENTUROUSLY. TRAVELOK.COM.

In Oklahoma, you can explore mesas, canyons and mountain ranges, enjoy hundreds of miles of historic Route 66, witness the incredible culture of dozens of native tribes, watch majestic blue grass at the Biggest Prairie Preserve, savor sophisticated urban nightlife and shopping, and drive on scenic coastlines from the region's border cities. The only question is: Where will your journey begin?

Plan your epic Oklahoma getaway at TRAVELOK.COM.

State Parks #1

TAKE FISHING. MORE FISH THAN YOU CAN TACKLE.

FEEL FREE TO MOVE ABOUT THE CABIN.

LET YOUR SPIRIT TAKE FLIGHT.

ONE BITE, AND YOU'LL BE HOOKED.

State Parks #2

SOME SITES GETTING CLOSER. MEANS GETTING AWAY FROM IT ALL.

HAVE A BOUTLOAD OF FUN AT AN OKLAHOMA STATE PARK.

TABLE OF THE UNBREDDED ADVENTURE.

BLAZE A TRAIL TO INSPIRATION.

Tulsa Visitor Guide

BEFORE YOU SEE THE SIGHTS, WE'RE THE SITE TO SEE.

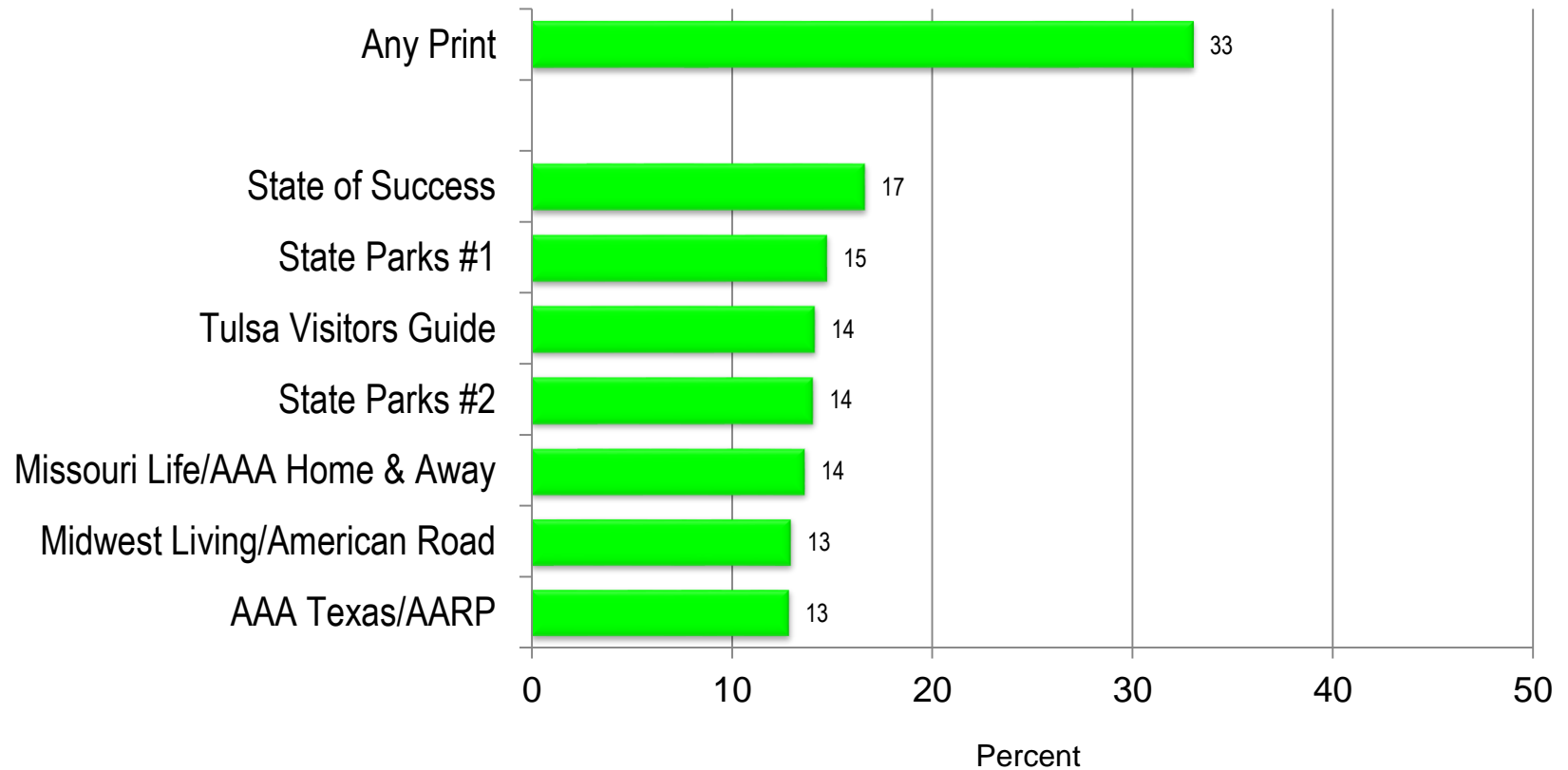
Before you explore northeastern Oklahoma, take a journey through TravelOK.com. We have hundreds of articles, thousands of photos, money-saving coupons and incredible deals. You can watch videos, explore events, read brochures and book your cabin or lodging online. Want balloons and buffalo herds? No problem. Festivals and festivals? We've got them. Are you ready to explore? Now you're talking. Send us to the heart of Oklahoma's best attractions. Let us TravelOK.com. To bring a new look to you.

Explore attractions, events, restaurants and lodging options at TRAVELOK.COM.

Awareness of Individual Ads — Print



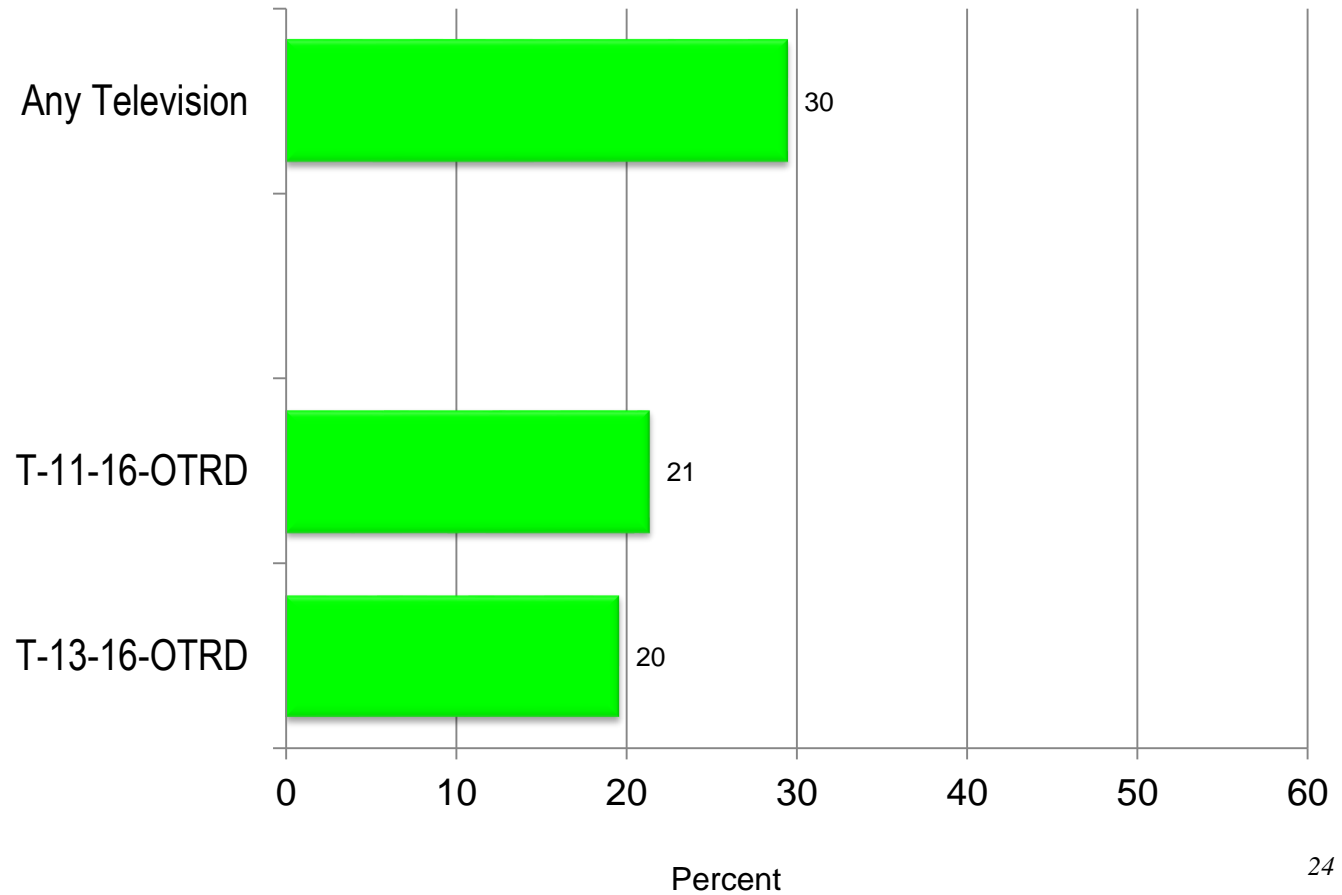
Base: Total Travelers



Awareness of Individual Ads – Television



Base: Total Travelers



Short-Term Impacts of the Advertising

Short-Term Impacts of The Advertising



	2015	2016	% Change
Ad Investment	\$2,249,972	\$2,255,337	+0.2%
Incremental Visits	1,222,257	1,422,071	+16.3%
Incremental Spending	\$204.6 M	\$210.0 M	+2.6%
State and Local Taxes	\$15.5 M	\$16.6 M	+7.1%
Spending ROI*	\$91	\$93	+2.2%
Total Tax ROI**	\$7	\$7	nil
State Tax ROI**	\$4	\$4	nil
Local Tax ROI**	\$3	\$3	nil

- Incremental visitor spending per ad \$ invested.

Spending is based on \$192.31 per person for overnight trips and \$45.15 per person for day trips in 2015

- ** Incremental taxes per ad \$ invested 7.9% (4.6% state and 3.3% local)

Campaign Efficiency



	2015	2016
Incremental Visits	1,222,257	1,422,071
Ad Investment	\$2,249,972	\$2,255,567
Ad \$'s per Trip	\$1.84	\$1.59
Trips per Ad \$	0.5	0.6

Longer-Term Impact of Advertising – Intent to Visit Oklahoma in Next 12 Months



2016	
Overnight	791,471
Day	432,489
Total Intenders	1,223,959

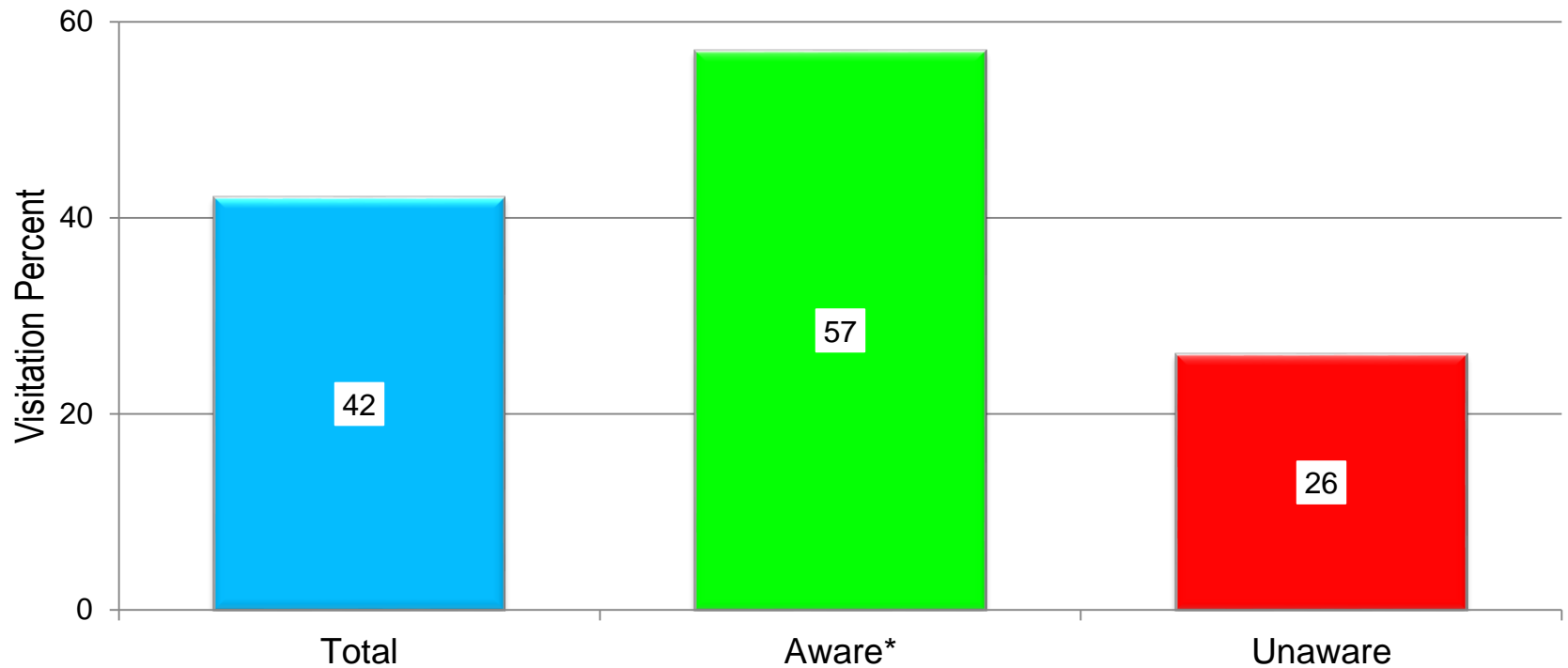
Difference in markets between 2015 and 2016 does not allow a comparison.

Appendix 1: Media Considerations

Impact of Advertising on Trip Taking



Base: Total Travelers

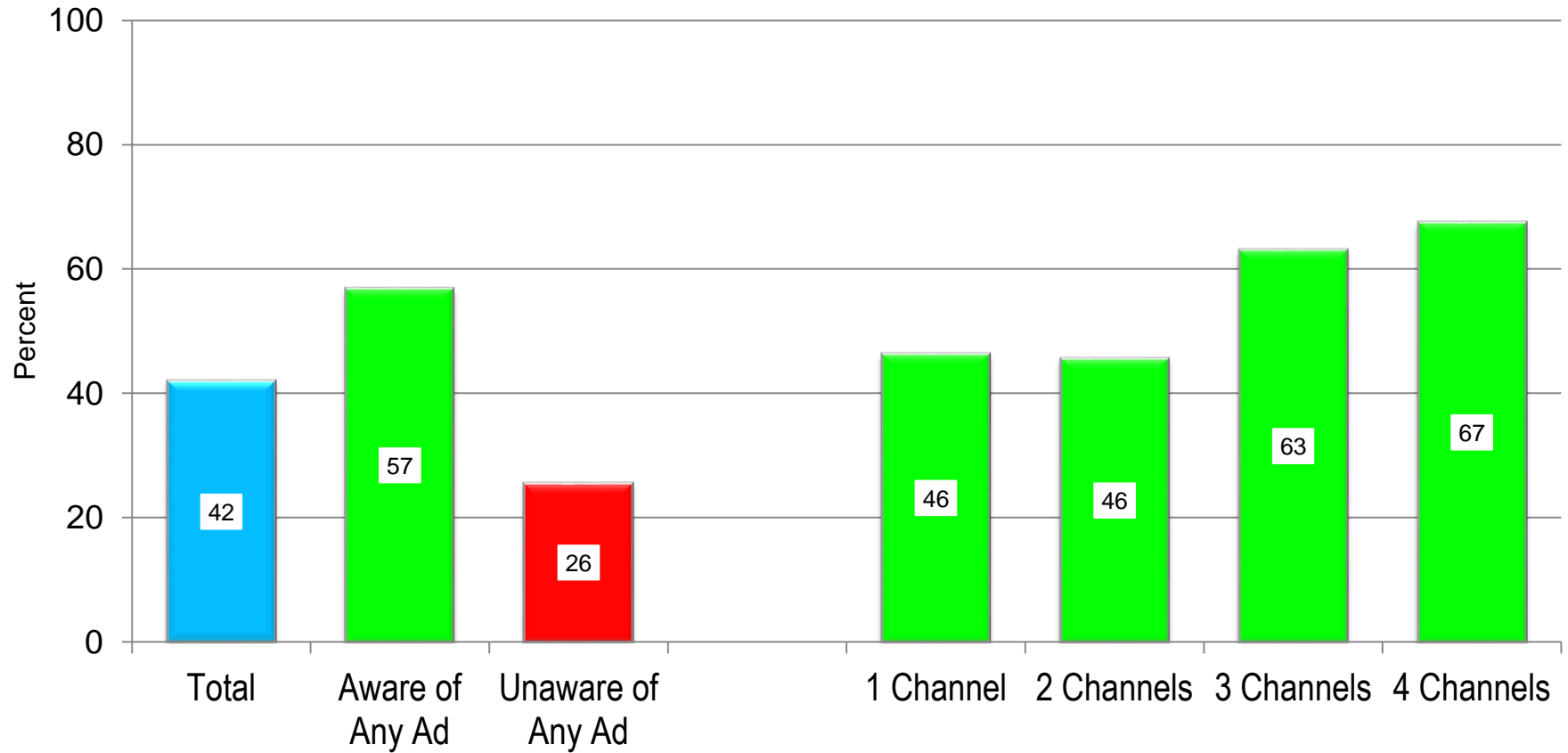


*Saw at least one ad

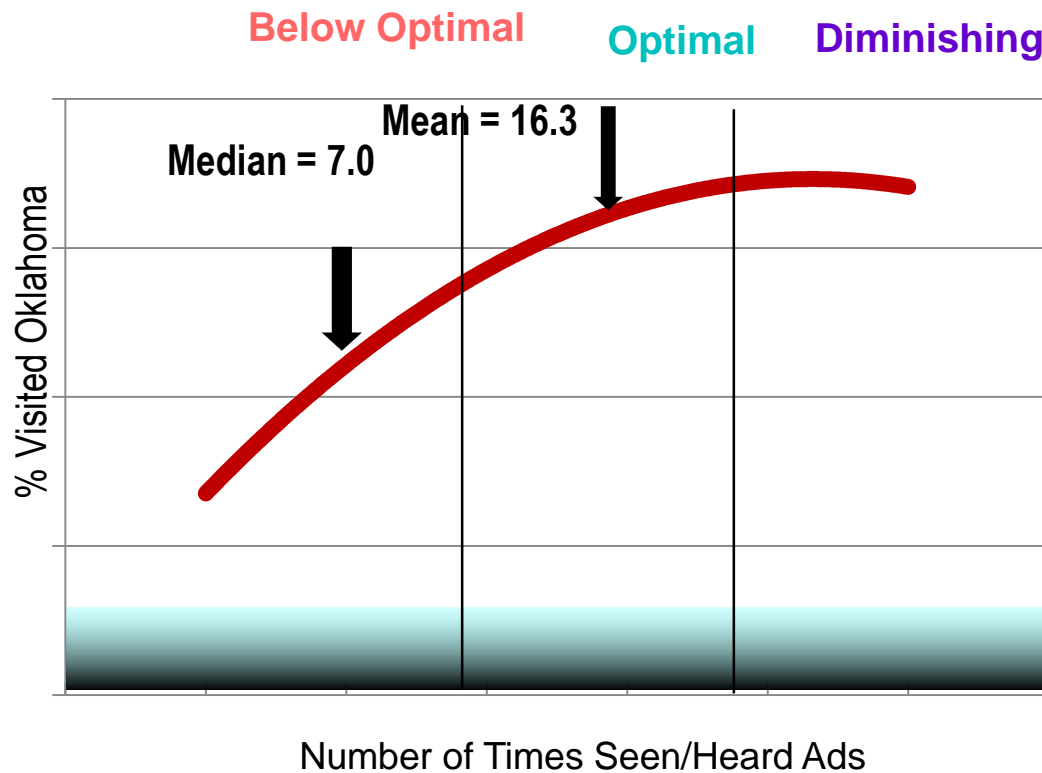
Impact on Visitation to Oklahoma by Number of Media Channels



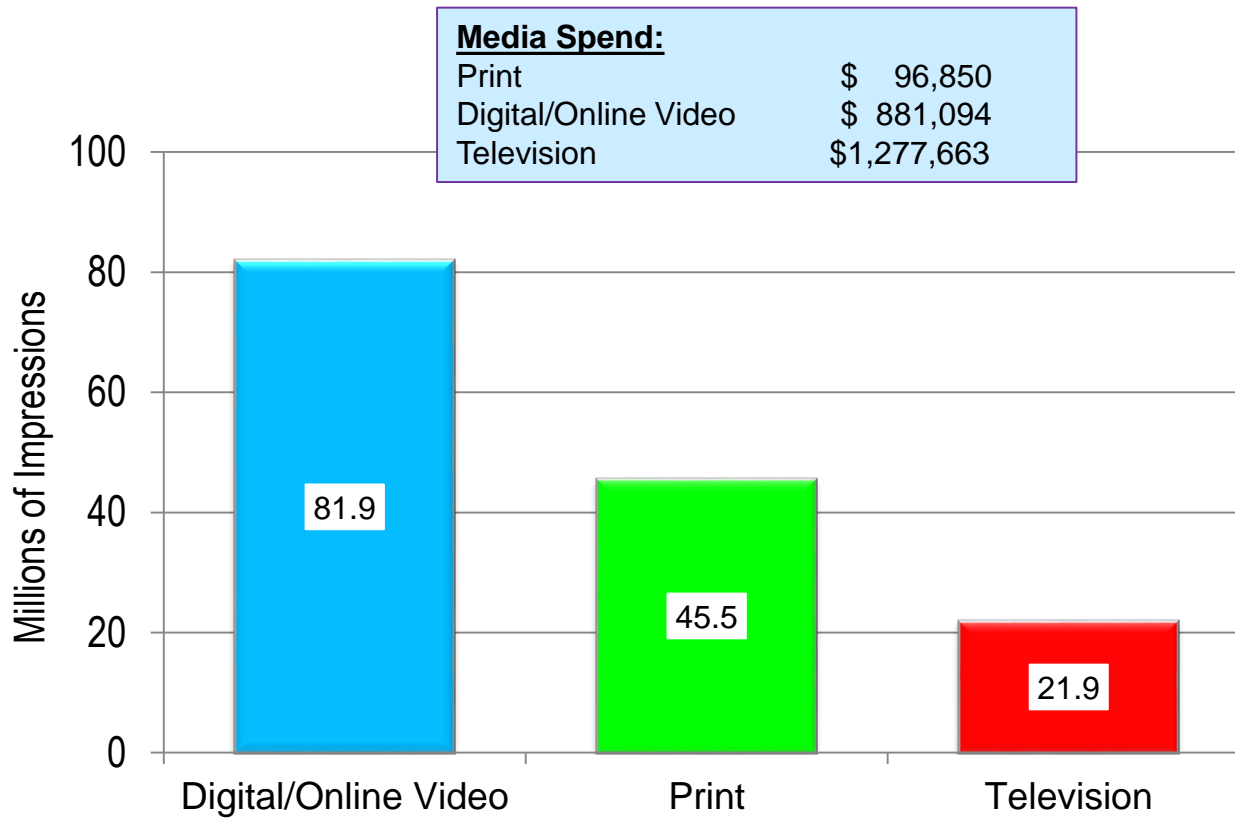
Base: Total Travelers



Impact of Ad Frequency on Visits to Oklahoma



Total Impressions by Media



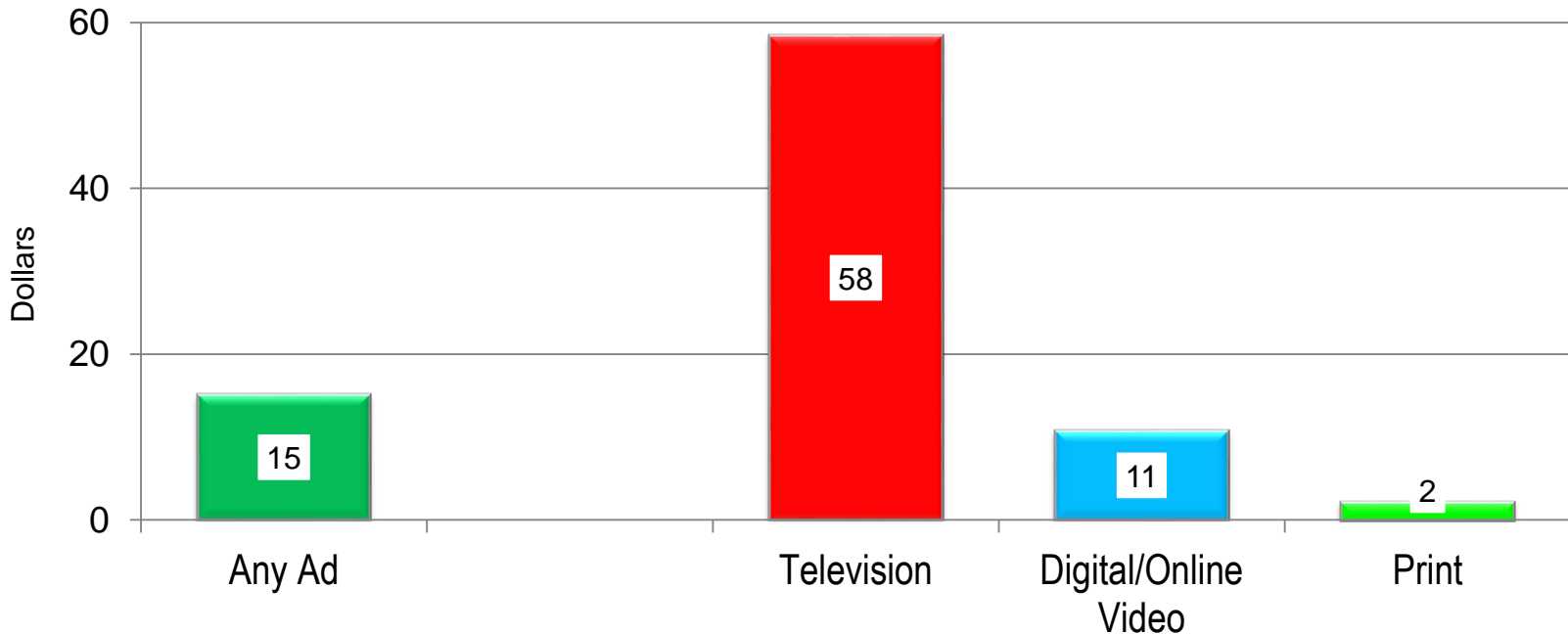
Cost Per Thousand Exposures – By Medium



Total Exposures = 149.2 Million

Media Spend:

Print	\$ 96,850
Digital/Online Video	\$ 881,094
Television	\$1,277,663

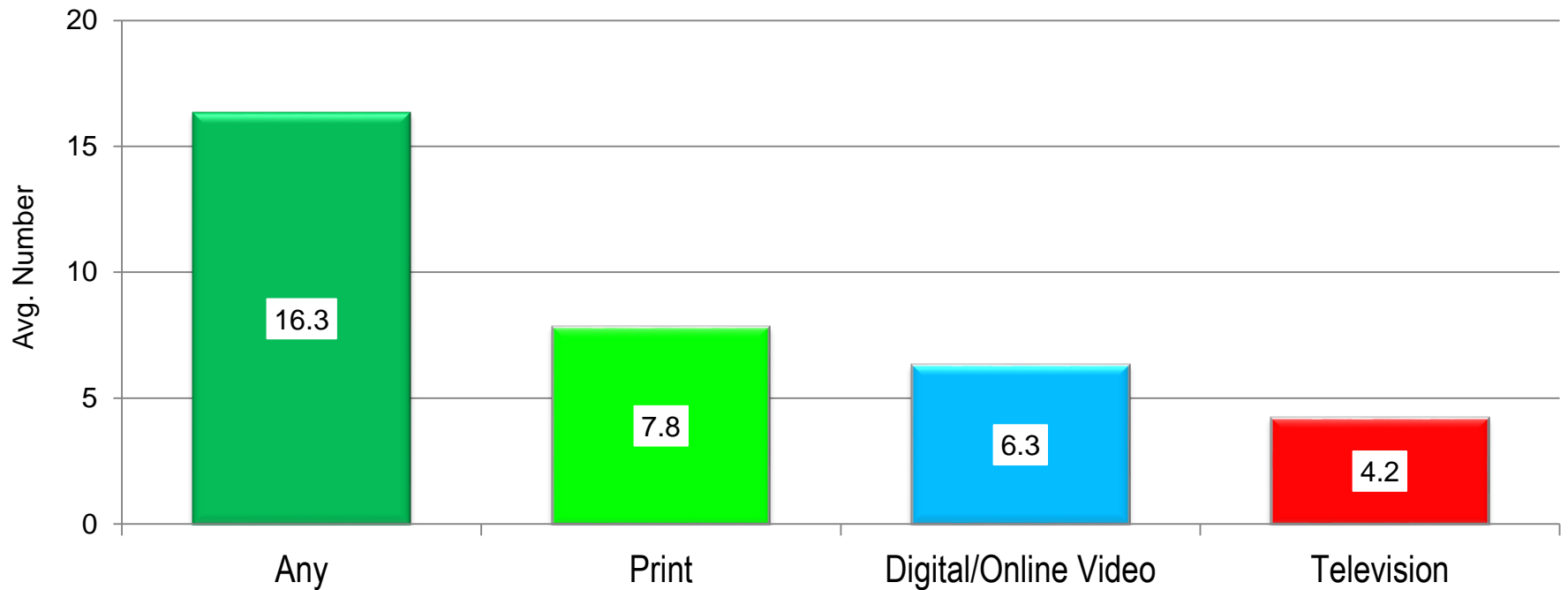


Frequency of Ad Exposure Recalled*



Base: Total Travelers

Total = 149.2 Million Exposures



*Saw at least one ad

Appendix 2:
Economic Development
Image Ratings

Economic Development Image Ratings

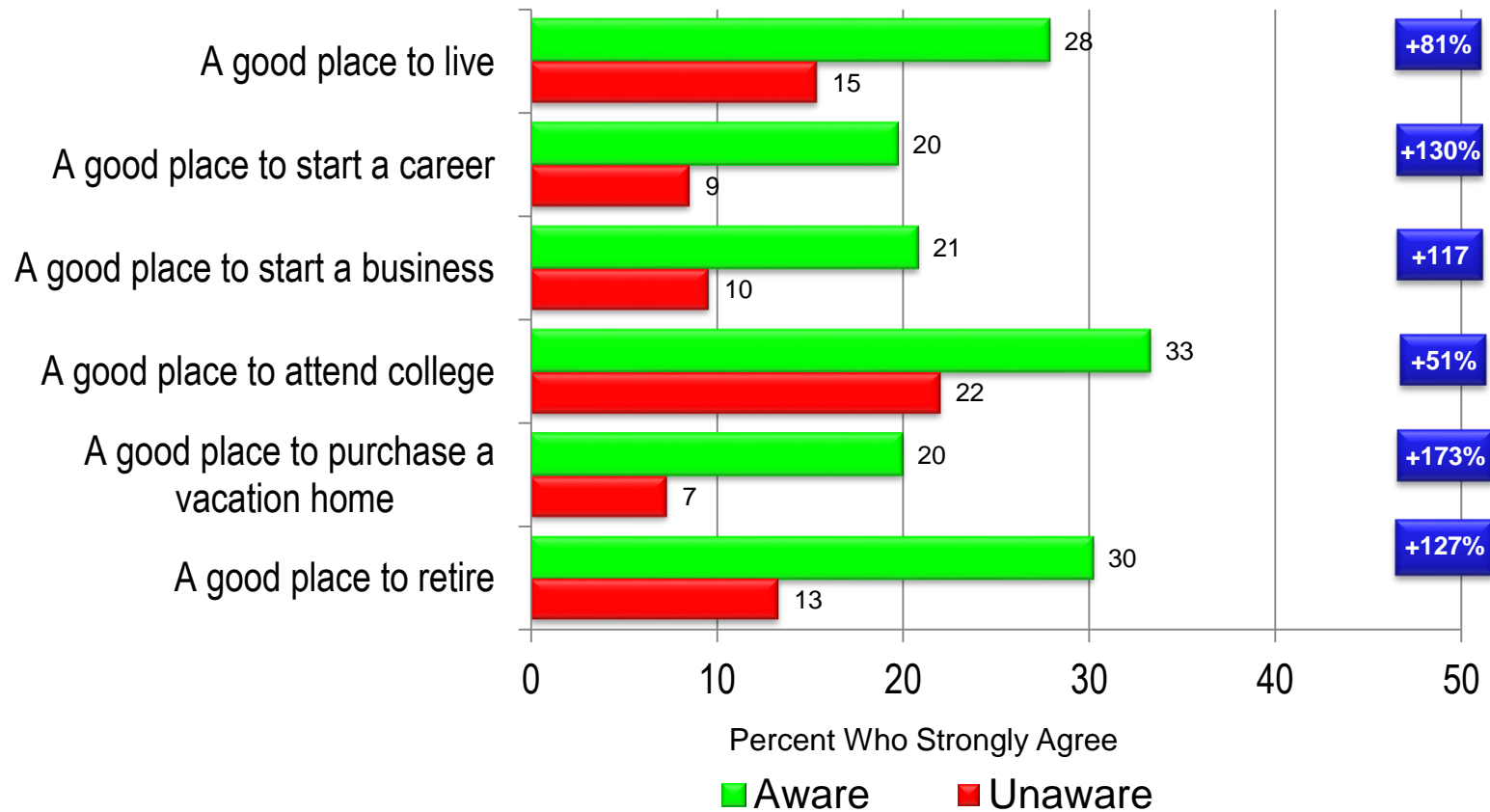


- Through Longwoods research, a link has been established between tourism advertising and economic development image ratings.
- This link also occurs in Oklahoma's 2016 advertised markets. On average, the Oklahoma economic development image ratings increased 113% in advertising awareness and 18% in visitation.
- The combination of the awareness and visitation provides a sizeable lift for all image attributes, especially for “a good place to buy a vacation home” and “a good place to retire.”

Impact of Oklahoma 2016 Tourism Campaign on State's Economic Development Image



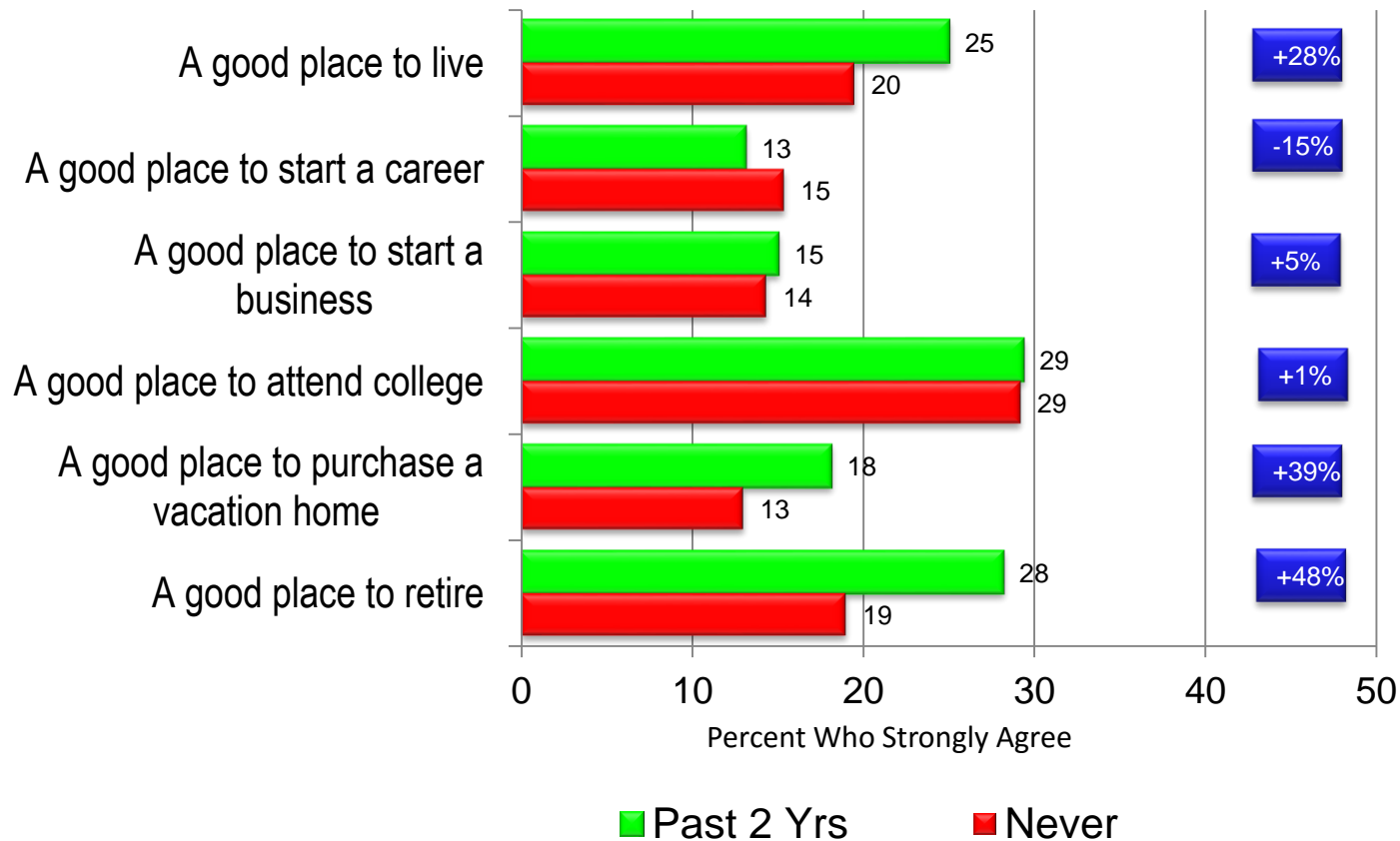
Base: Out-of-State Residents



Impact of 2016 *Visitation* on Oklahoma Economic Development Image



Base: Out-of-State Residents

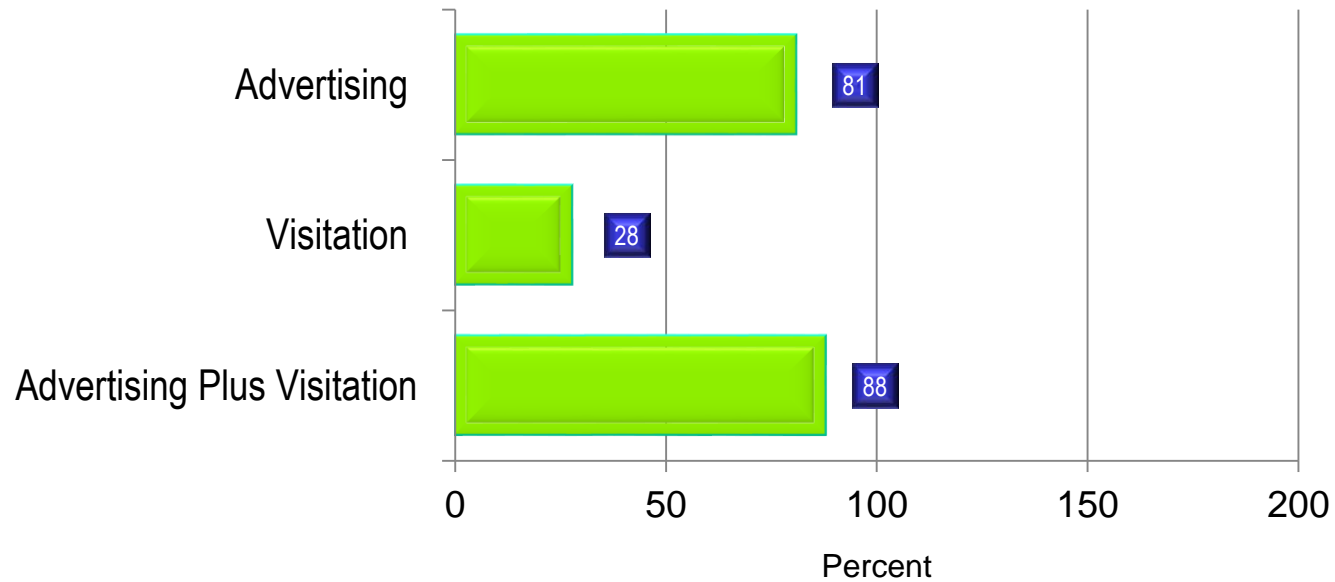


"A Good Place to Live"



Base: Out-of-State Residents

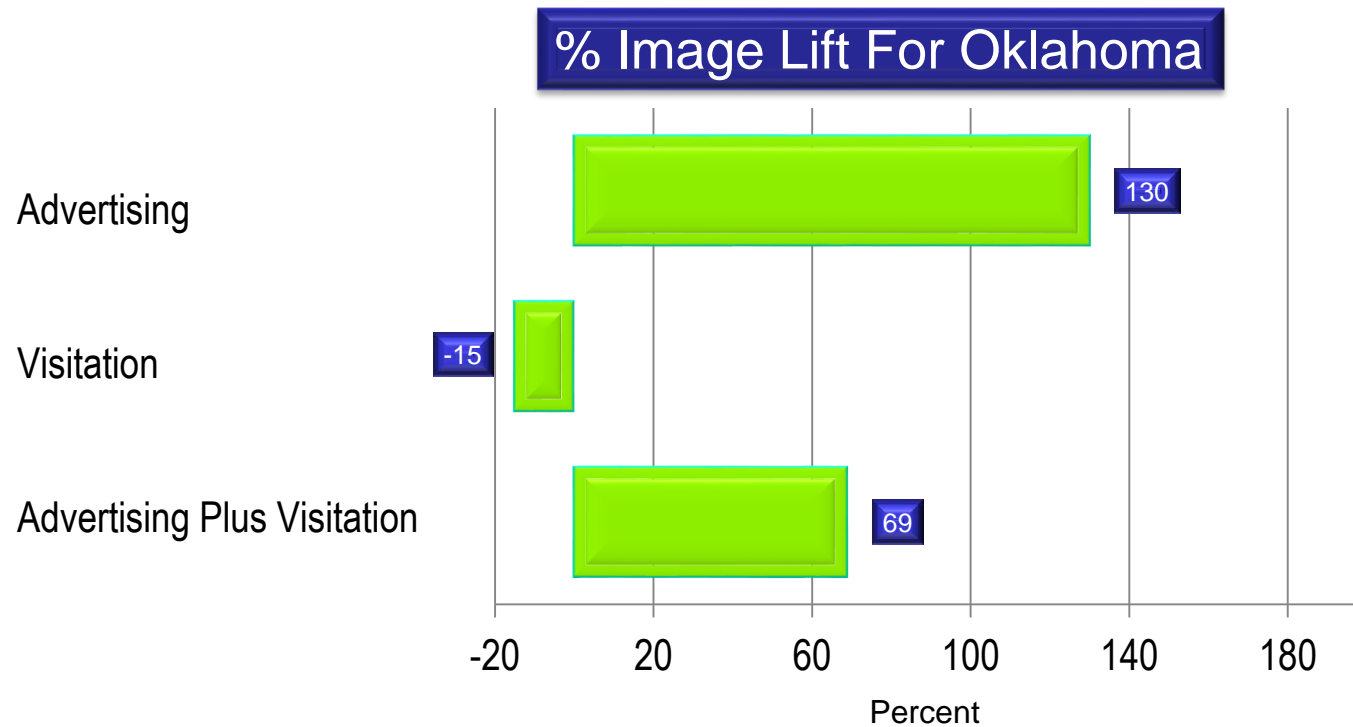
% Image Lift For Oklahoma



“A Good Place to Start a Career”



Base: Out-of-State Residents

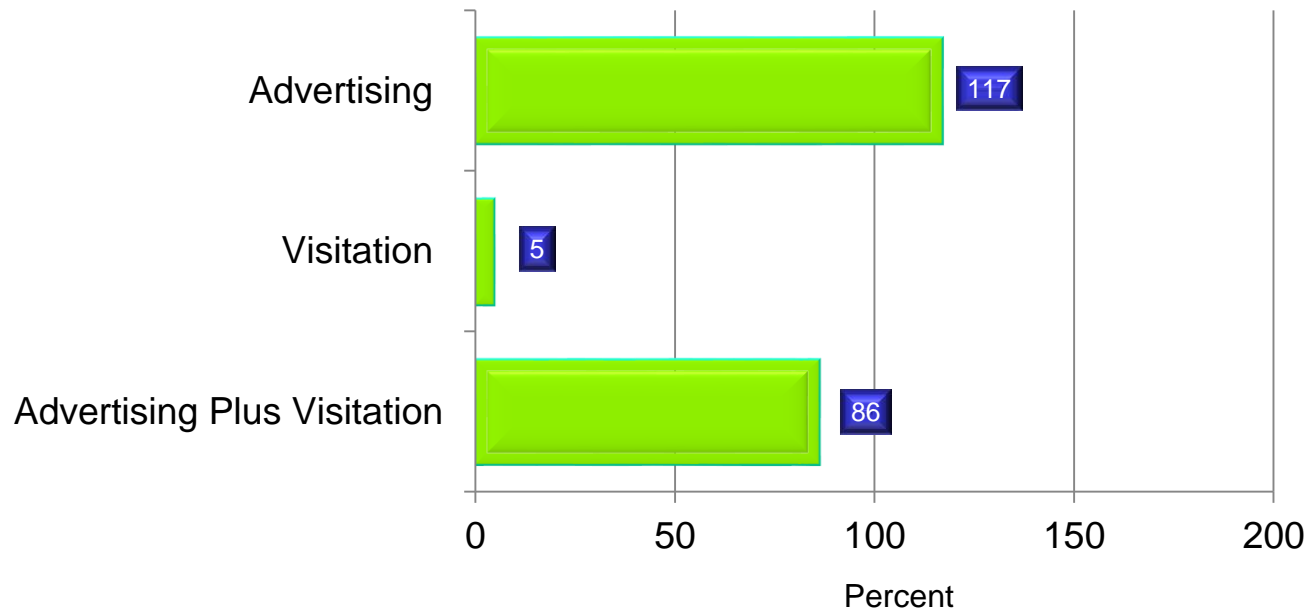


“A Good Place to Start a Business”



Base: Out-of-State Residents

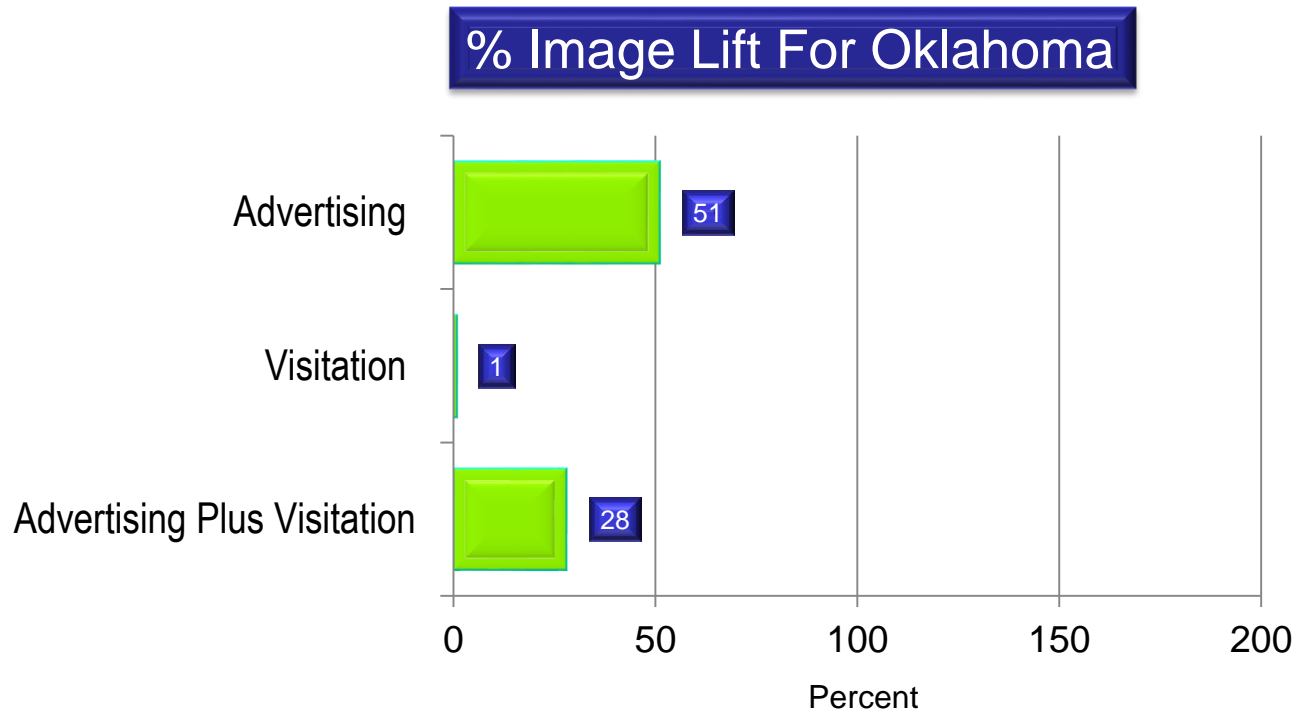
% Image Lift For Oklahoma



“A Good Place to Attend College”



Base: Out-of-State Residents

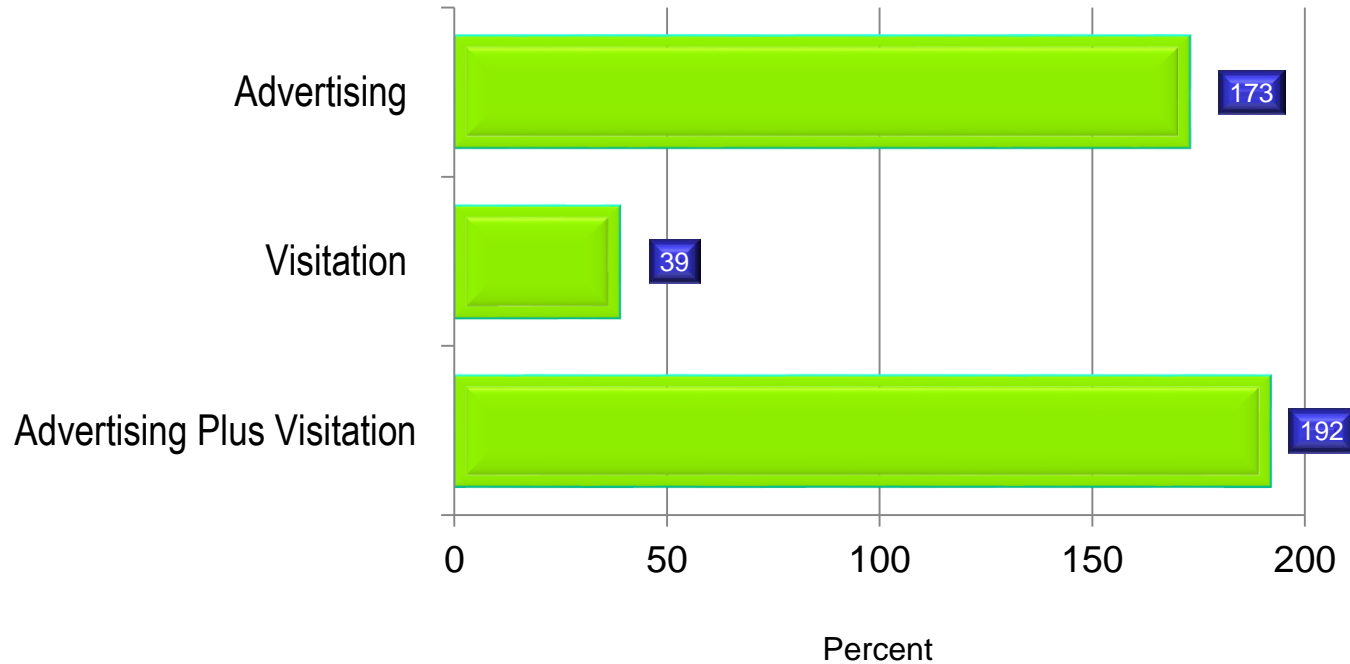


“A Good Place to Purchase a Vacation Home”



Base: Out-of-State Residents

% Image Lift For Oklahoma

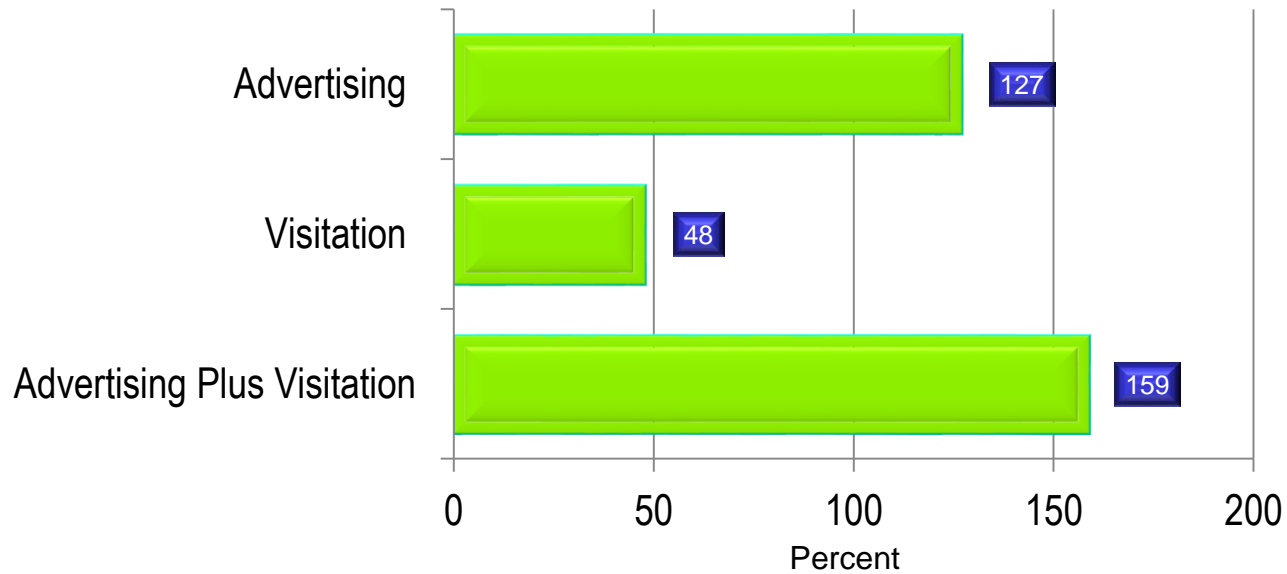


"A Good Place to Retire"



Base: Out-of-State Residents

% Image Lift For Oklahoma

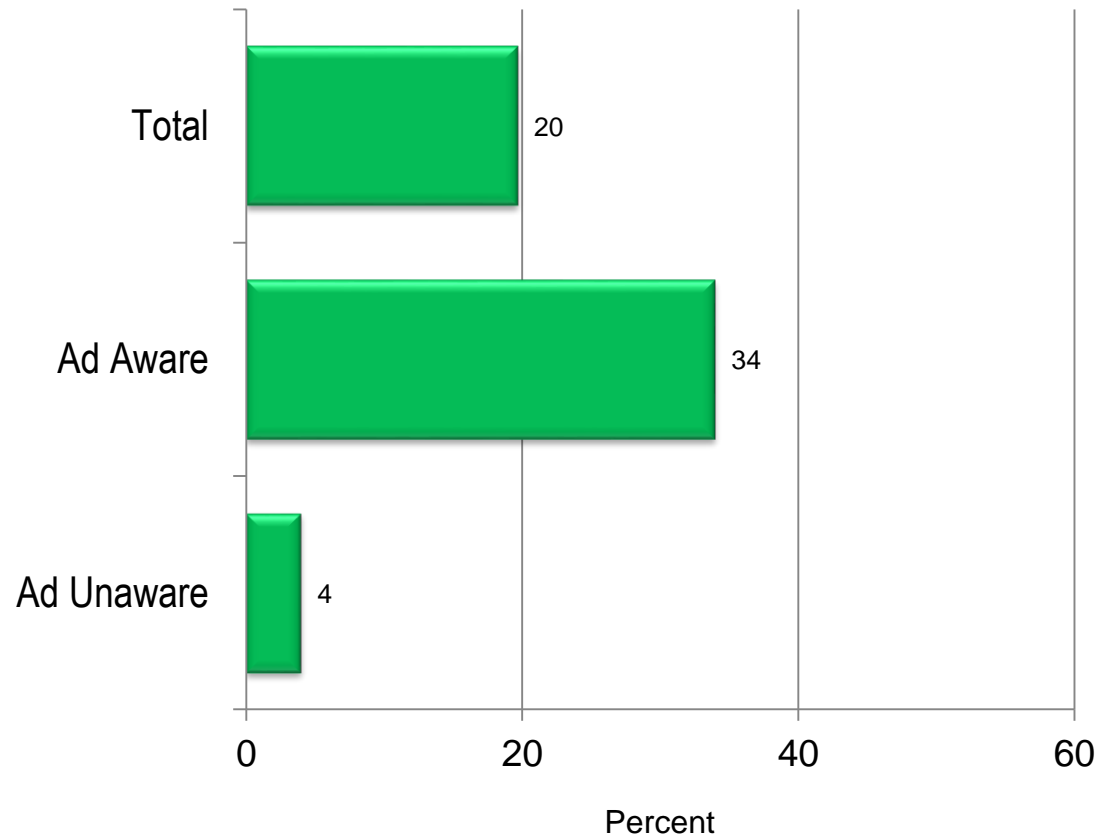


Appendix 3:
Impact of Ads on Visiting
www.travelok.com and Trip
Planning

Visited Travel Website travelok.com by Advertising Awareness in 2016



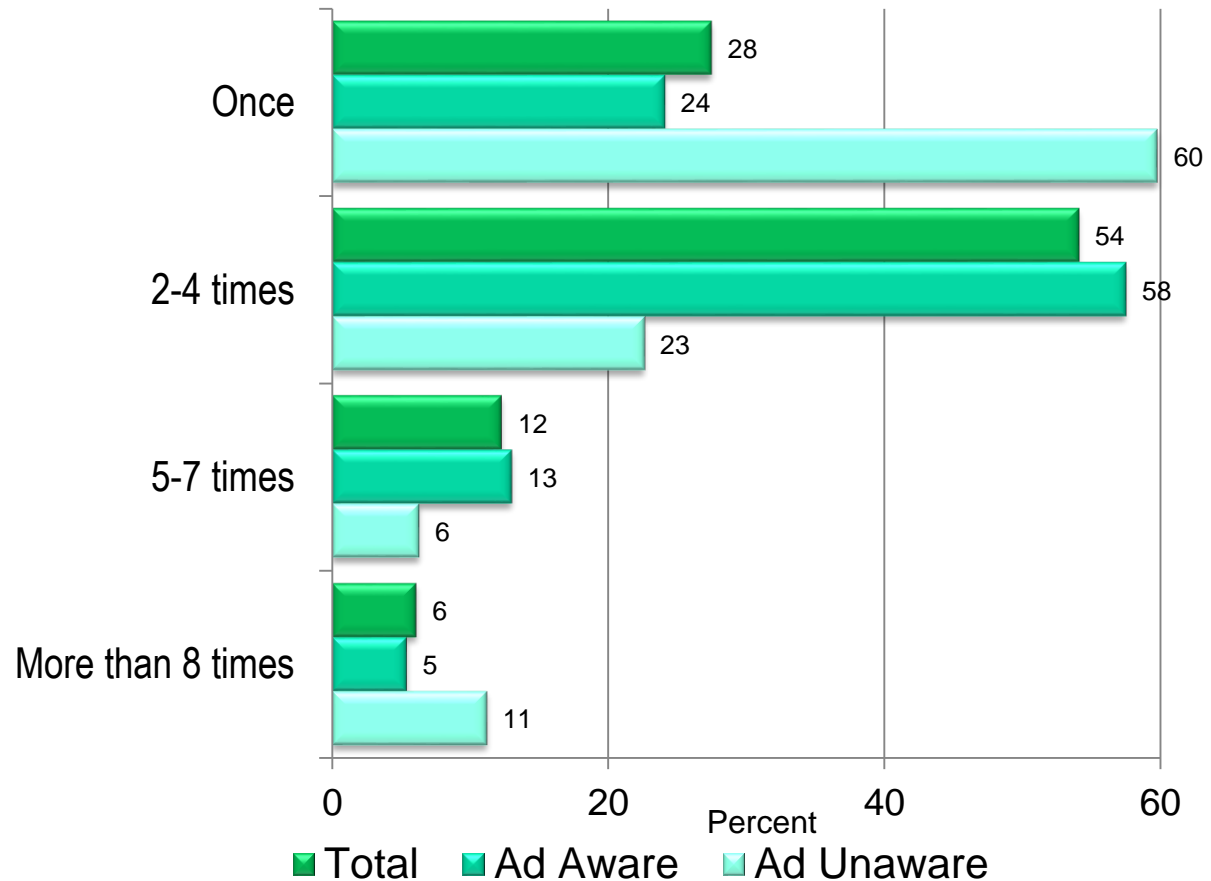
Base: Total Travelers



Number of Times Visited Travel Website travelok.com in 2016 by Ad Awareness



Base: Visited travelok.com



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



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

