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**2019 Oklahoma Tourism  
Advertising  
Accountability Research**

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# Background and Purpose

- In 2019, Oklahoma launched their advertising campaign in key markets.
  - The campaign consisted of both traditional and online media including:
    - Print ads
    - Digital ads
    - Television and online video ads
    - Social media ads
- Longwoods was engaged to conduct a program of research designed to:
  - Measure the effectiveness of the advertising campaign in bringing visitors to Oklahoma during the campaign period and shortly thereafter and increasing intentions to visit in the future.
  - Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Oklahoma by those visitors, and incremental taxes generated by that spending.

# Research Objectives

- The objectives of the research were to measure:
  - Awareness of Oklahoma's advertising activity (i.e., individual advertising elements)
  - Impact of Oklahoma's advertising on:
    - Actual visits to Oklahoma during and shortly after the campaign period
    - Carry-over impacts: anticipated trips planned in the next 12 months as a result of the campaign
  - Impact of Oklahoma's advertising on conversion and intentions to visit by media combinations and markets

# Method

- A study was conducted after the conclusion of the advertising period to measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit, and measure short-term conversion that occurred during and shortly after the campaign period.
  - A national self-completion survey of 1,400 respondents in the 12 advertising markets for Oklahoma.
  - Respondents are members of a major online consumer research panel.
  - Adults 18 years of age and older were randomly selected from the panel to ensure a representative sample.
  - Sample was drawn to be proportionate to population by specific DMAs, age, sex and income.
  - Qualified respondents are defined as travelers who have traveled in the past 3 years and plan to travel in the next 2 years.

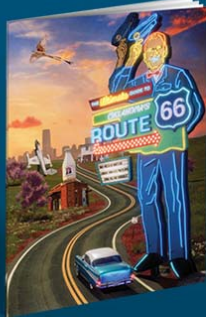
## Method (Cont'd)

- The survey took an average of 9 minutes to complete.
- During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on behavioral measures.
- The fieldwork was conducted in October 2019.
- Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific DMAs.
- For a sample of this size, the confidence level is + / – 2.5%, 19 times out of 20.

## Method (Cont'd)

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

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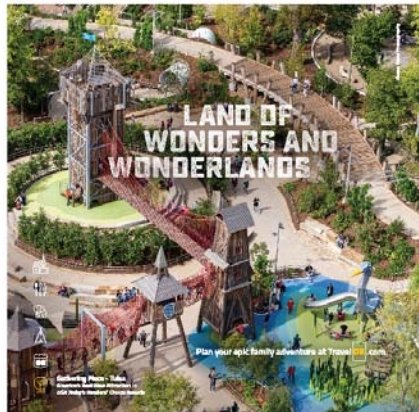
## Conclusions

# Conclusions

- Oklahoma's 2019 advertising campaigns generated a 51% recall rate and the three markets with the highest level of recall were Oklahoma (68%), Wichita Falls (65%) and Ft. Smith-Fayetteville-Springdale-Rodgers (57%).
- In the short-term, the \$3.1 million in media costs have generated an ROI of \$70 in visitor spending and \$6 in taxes for each ad dollar spent.
- The advertising also had a positive effect on actual travel to Oklahoma:
  - Yielding 1.5 million incremental trips over and above the travel that would have occurred in the absence of advertising.
- This incremental travel translates into additional visitor expenditures of \$219 million while those travelers were in Oklahoma.

## Conclusions (Cont'd)

- Additional spending in 2019 in Oklahoma and Wichita contributed to an increase in awareness in those markets.
  - This was not the case with Dallas/Fort Worth, where the awareness was flat.
  - On the contrary a decrease in spending in San Antonio did not affect the awareness levels there, in fact, there was an increase in awareness.
- The sizeable increase in social media spending resulted in a significant increase in awareness in that channel.
- The increase in spending in the other channels however did not produce an increase in awareness.



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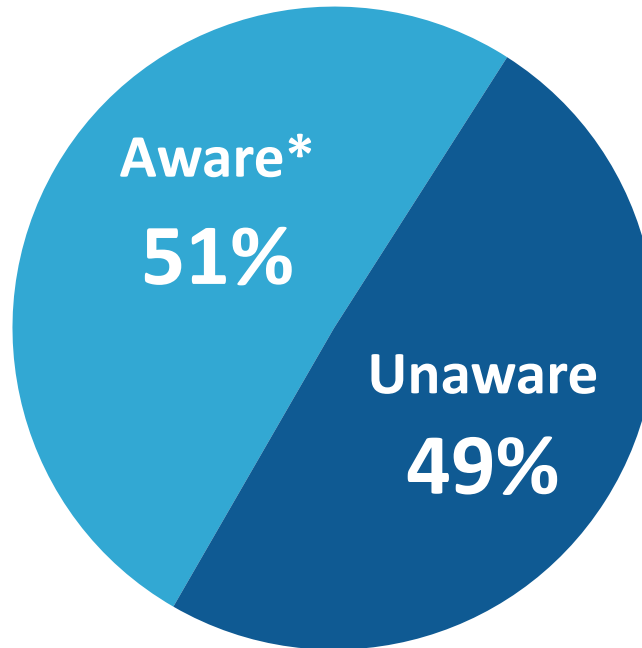
**Advertising  
Awareness**

# Advertising Awareness

- Over half (51%) of travelers in Oklahoma's core markets recalled seeing at least one TravelOK ad.
- Ad awareness was highest in Oklahoma (68%), Wichita Falls (65%) and Ft. Smith-Fayetteville-Springdale-Rodgers (57%).
- People were more likely to remember a digital (38%) or social media (30%) ad than a TV (23%) or print (22%) ad.
- The ads with the highest level of recall were:
  - Social media compilations
  - Travel Guide compilation
  - Print compilations 1 and 2
  - History & Heritage
  - Adventure Seekers

# Awareness of the Ad Campaign

Base: Residents of Oklahoma's Regional Advertising Markets



Awareness level is up 4% from 2018

\*Saw at least one ad

# Awareness\* by Market

Base: Residents of Oklahoma's Regional Advertising Markets

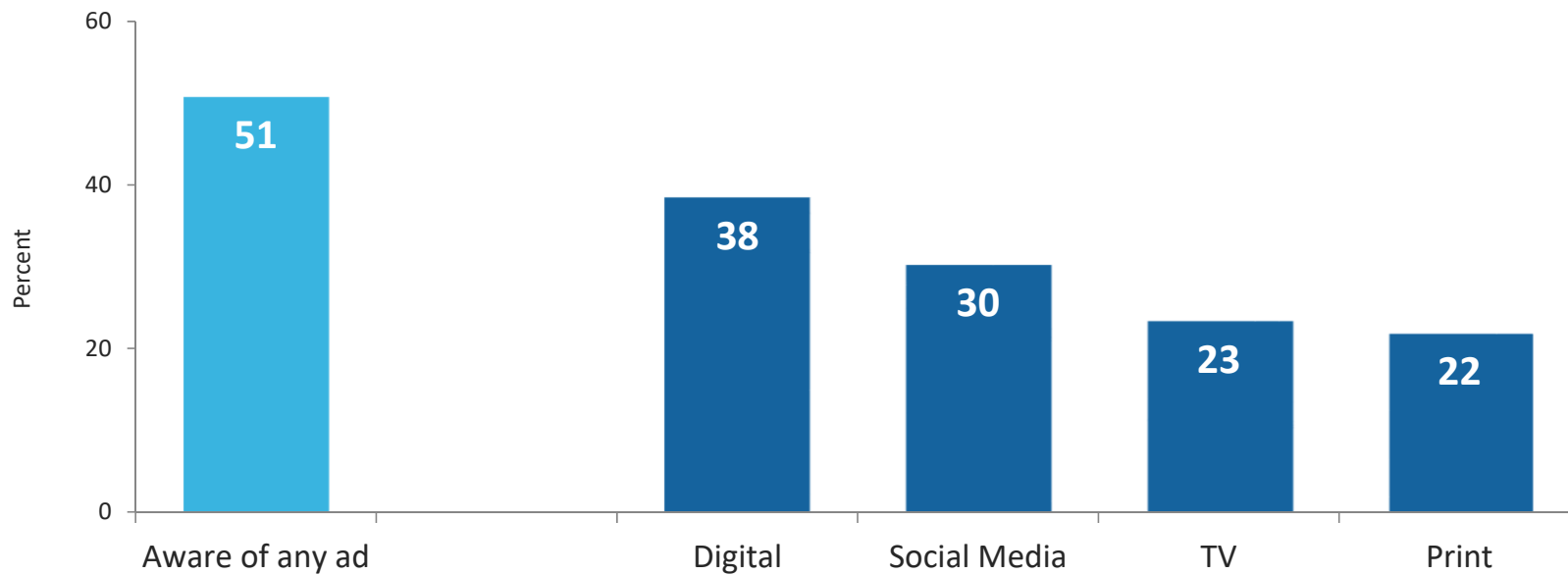
Market	Ad Awareness	2018 Comparison	Market	Ad Awareness	2018 Comparison
Oklahoma (State)	67.6	+4.6%	Shreveport**	52.6	+14.7%
Wichita Falls**	64.6	+16.2%	San Antonio	52.3	+11.5%
Ft. Smith-Fayetteville-Springdale-Rodgers**	56.7	+0.6%	Springfield**	51.1	+1.7%
Amarillo**	55.6	+3.9%	Dallas-Ft. Worth	50.4	-0.2%
Wichita**	53.4	+11.9%	Kansas City	37.1	-1.6%
Little Rock-Pine Bluff**	52.8	+2.1%	Austin	31.7	+3.6%

\*Saw at least one ad

\*\*Caution: small base size

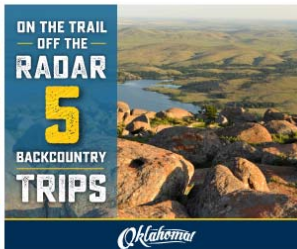
# Advertising Awareness\* by Medium

Base: Residents of Oklahoma's Regional Advertising Markets



\*Saw at least one ad

# Digital Creative



Adventure Seekers



Bright Lights



Family Memory Makers

# Digital Creative (Cont'd)



History & Heritage

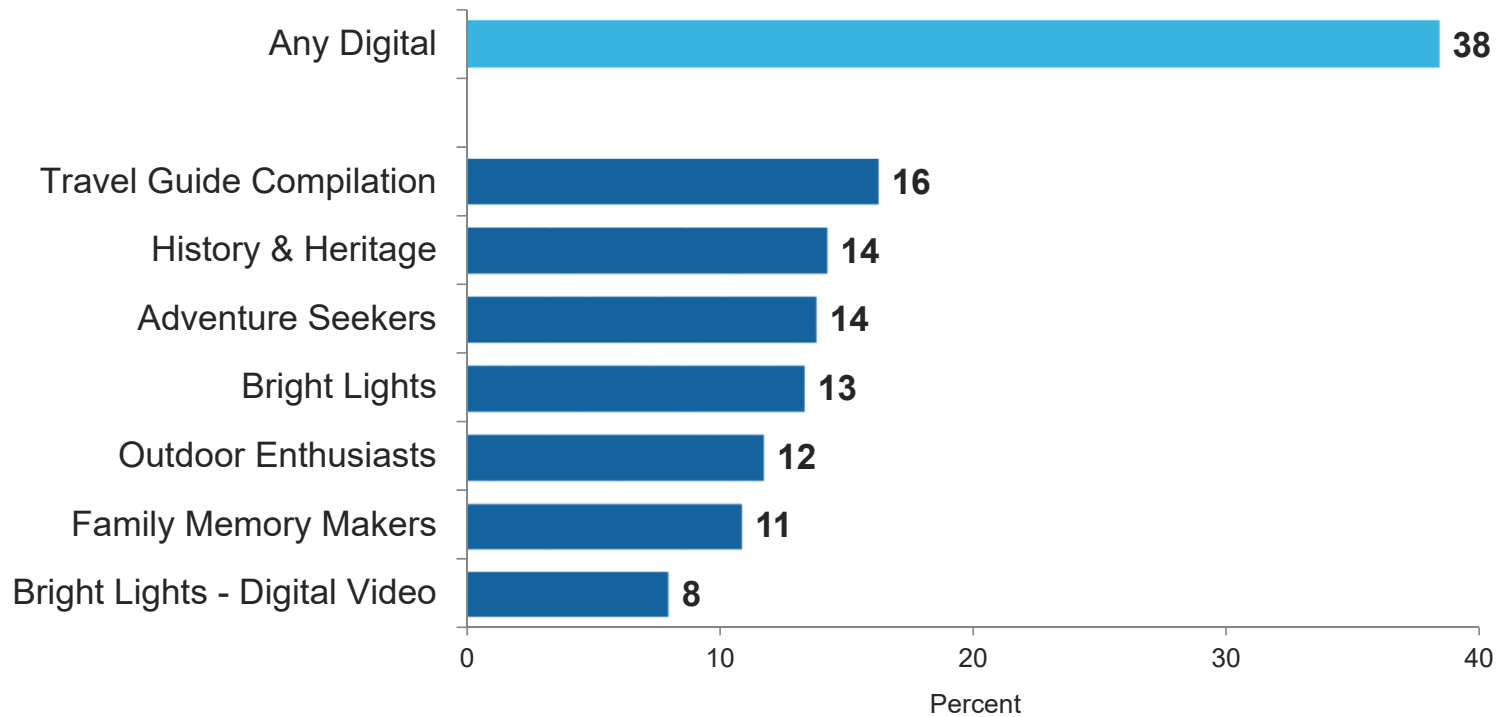


Outdoor Enthusiasts



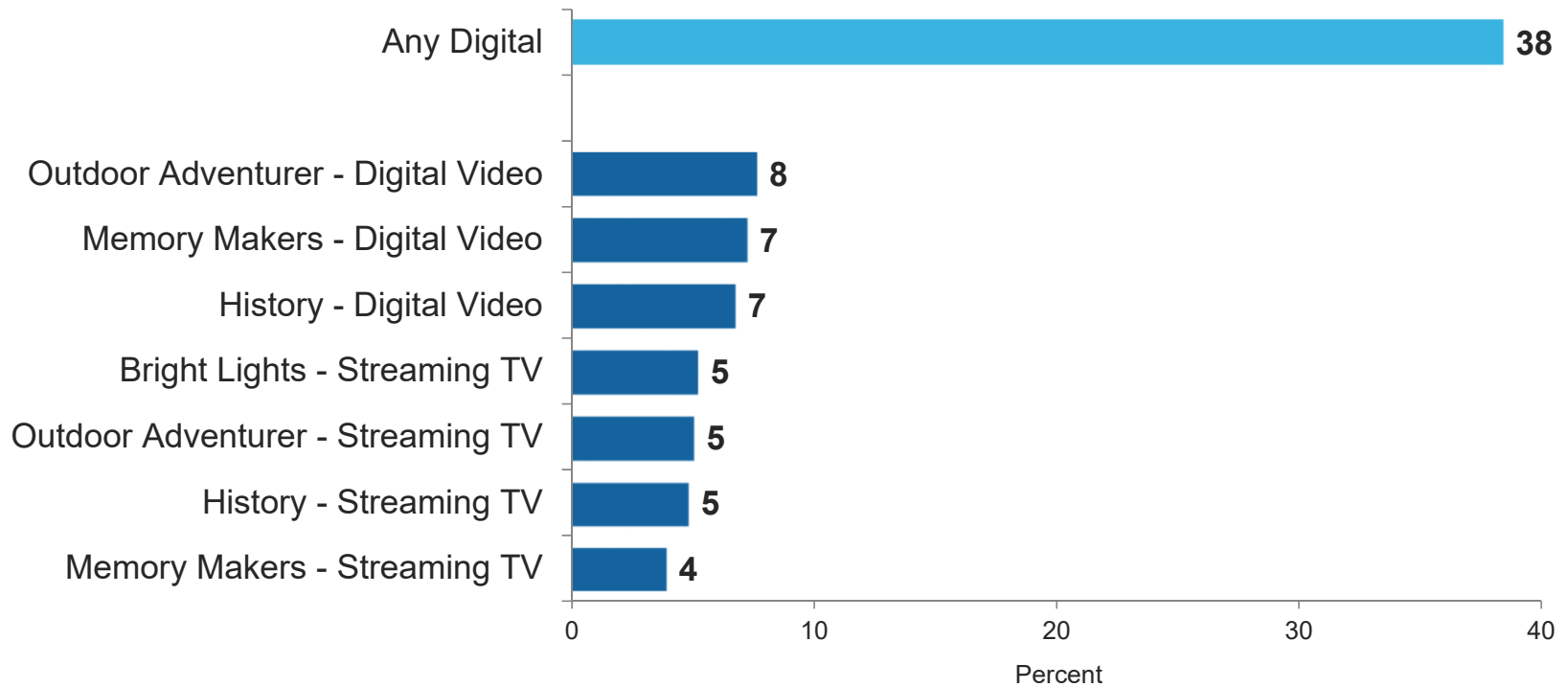
Travel Guide Compilation

# Awareness of Individual Ads\* - Digital



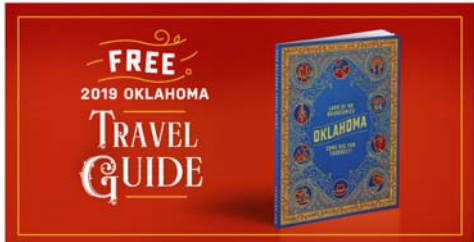
\*Based on markets where shown

## Awareness of Individual Ads\* - Digital (Cont'd)



\*Based on markets where shown

# Social Media Creative



Social Media Travel Guide Compilation

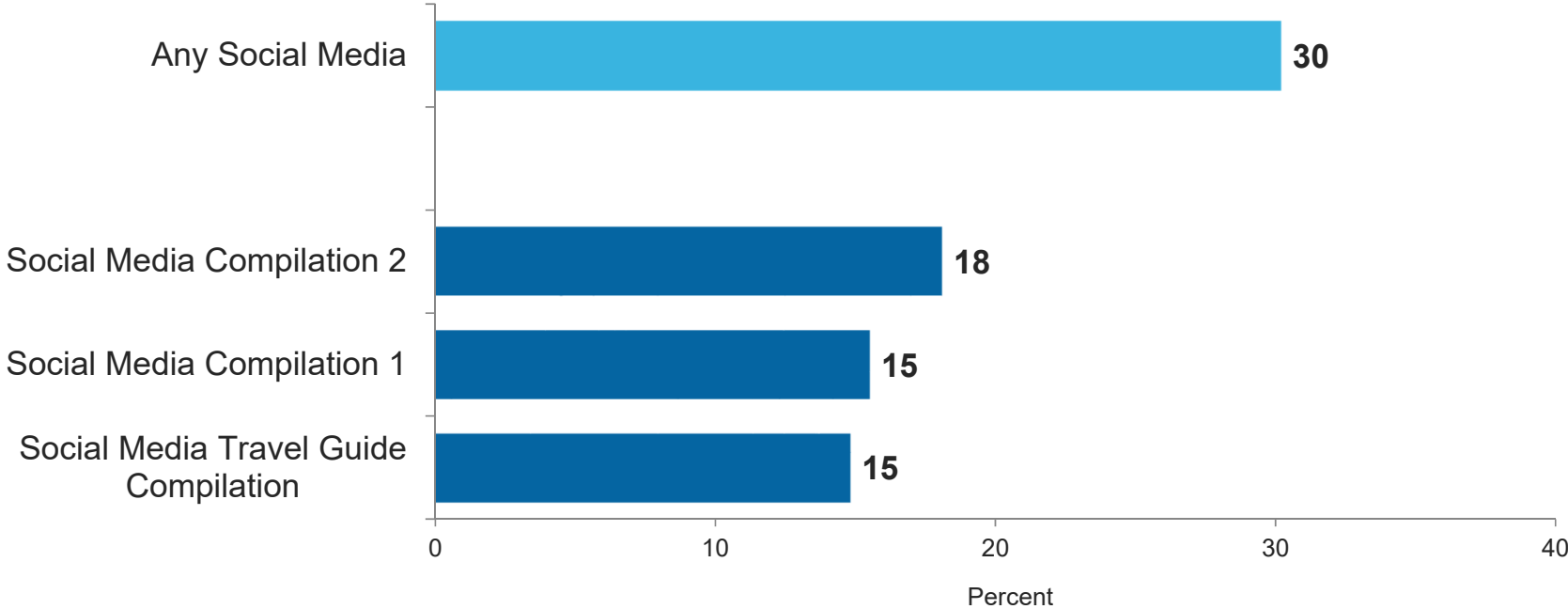


Social Media Compilation 1



Social Media Compilation 2

# Awareness of Individual Ads\* - Social Media



\*Based on markets where shown

# Print Creative



Print Compilation 1



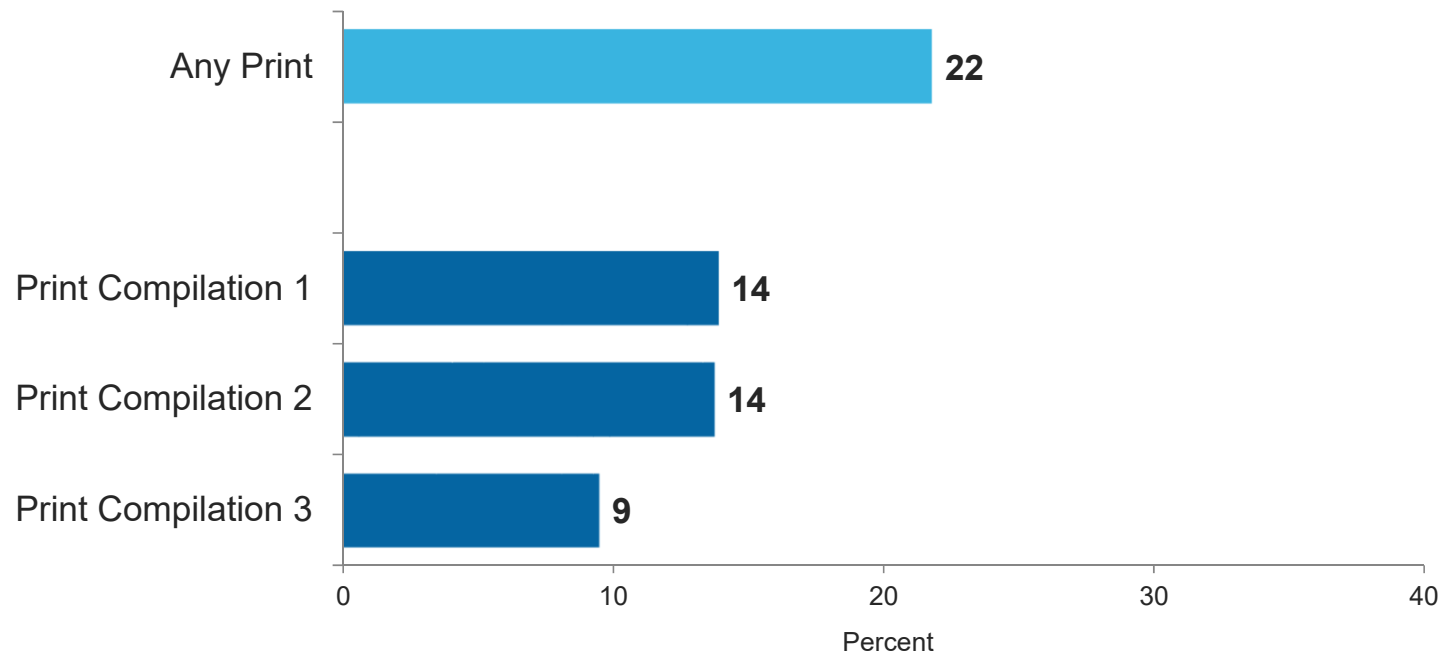
Print Compilation 2

# Print Creative (Cont'd)



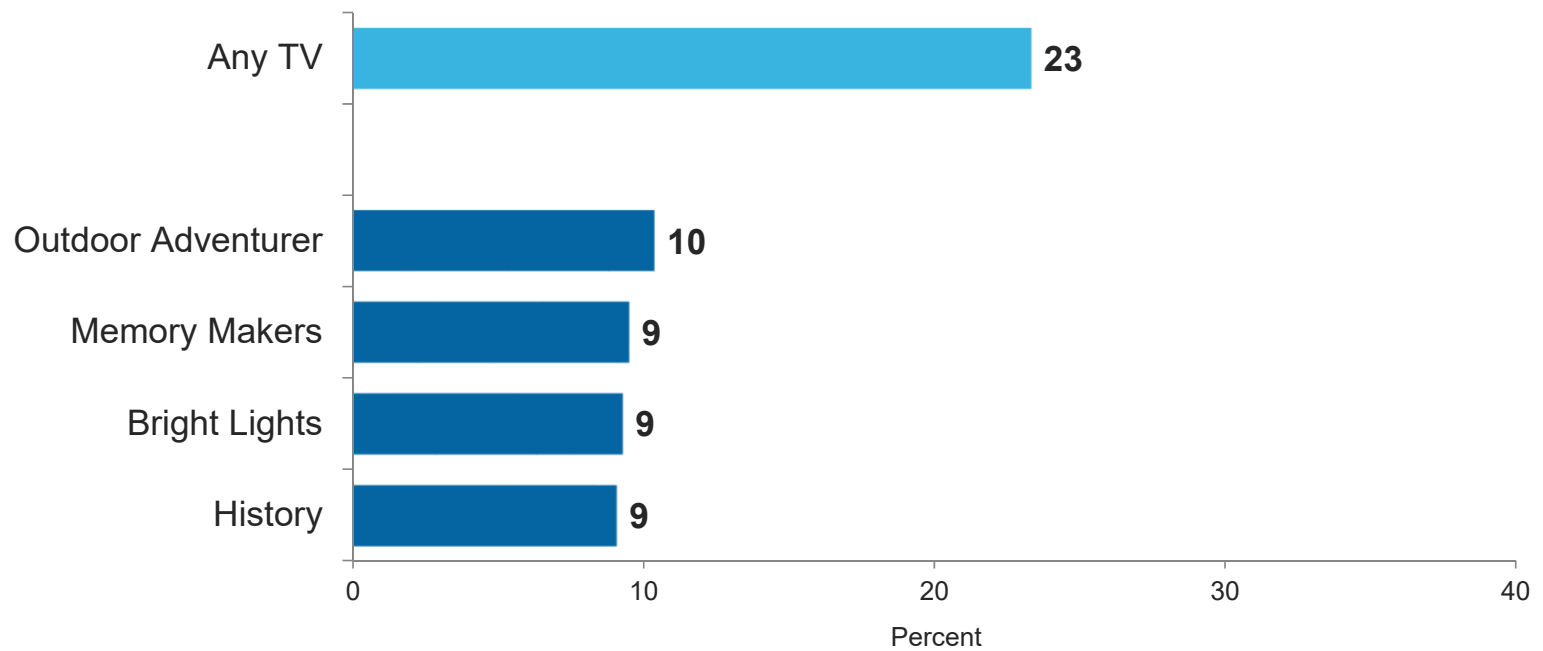
Print Compilation 3

# Awareness of Individual Ads\* - Print



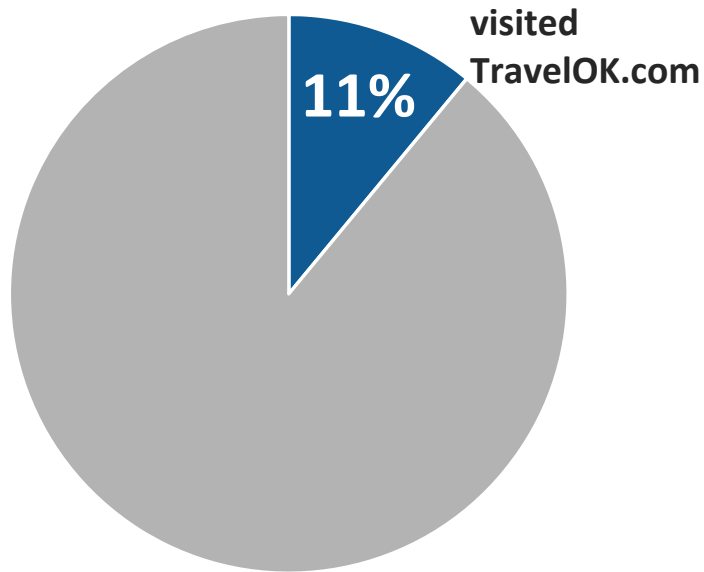
\*Based on markets where shown

# Awareness of Individual Ads\* - TV

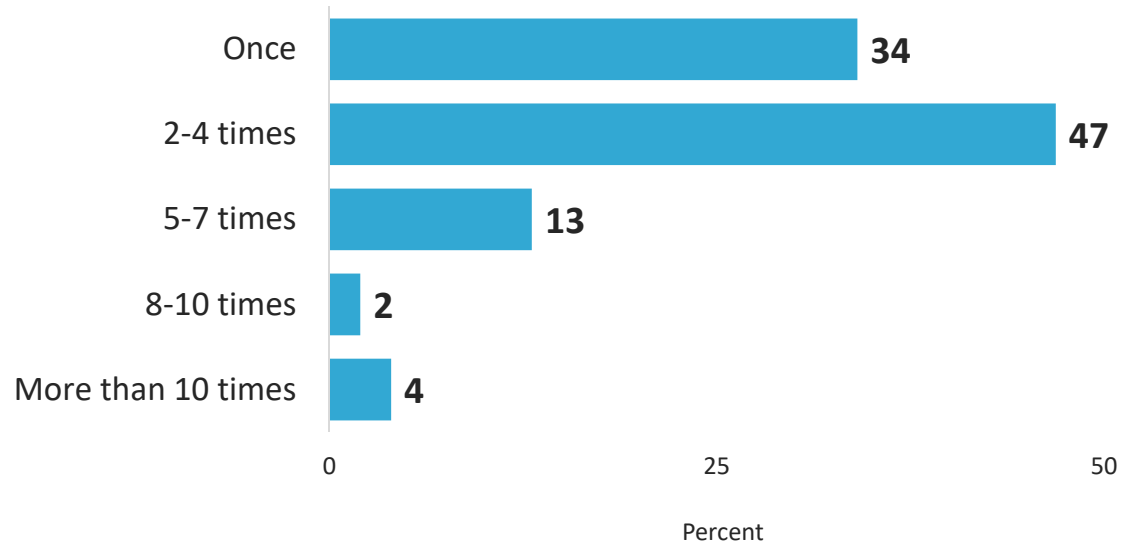


\*Based on markets where shown

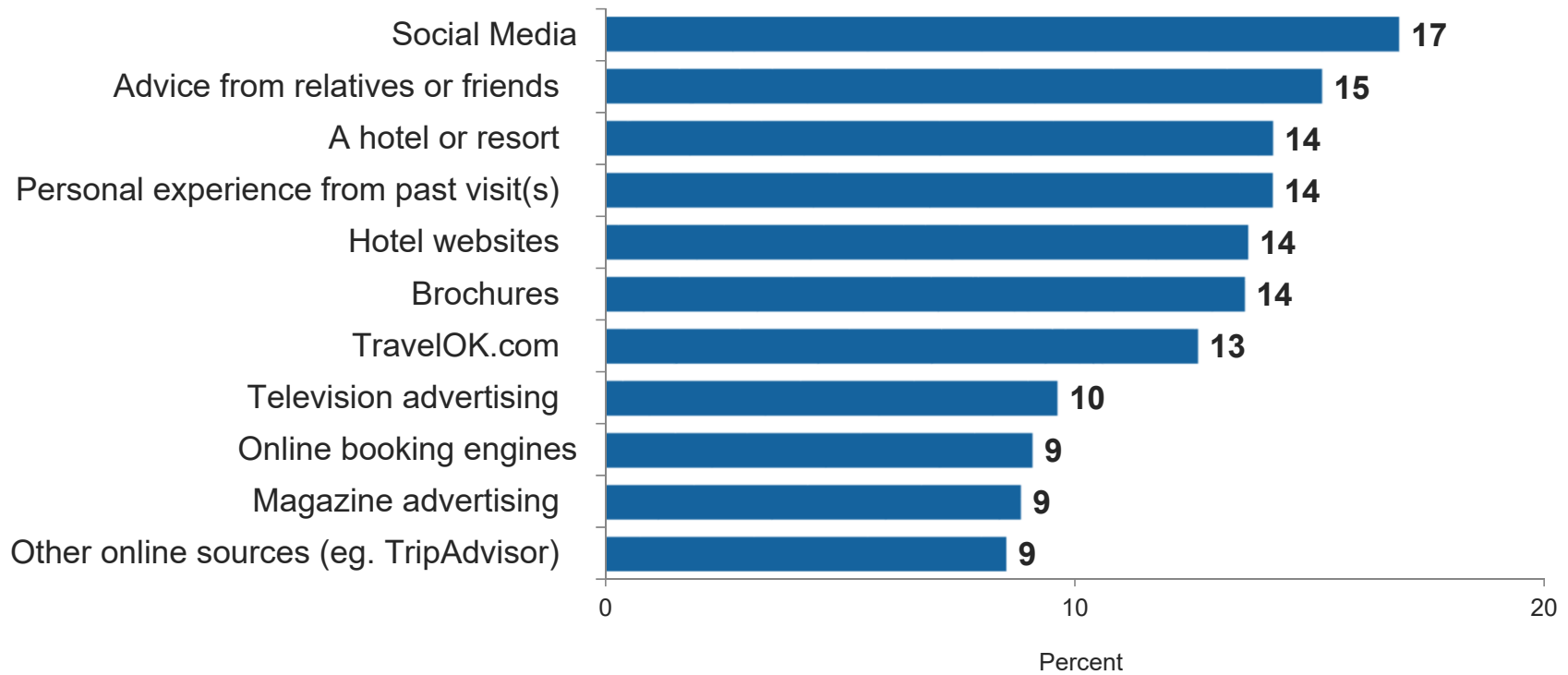
# Website



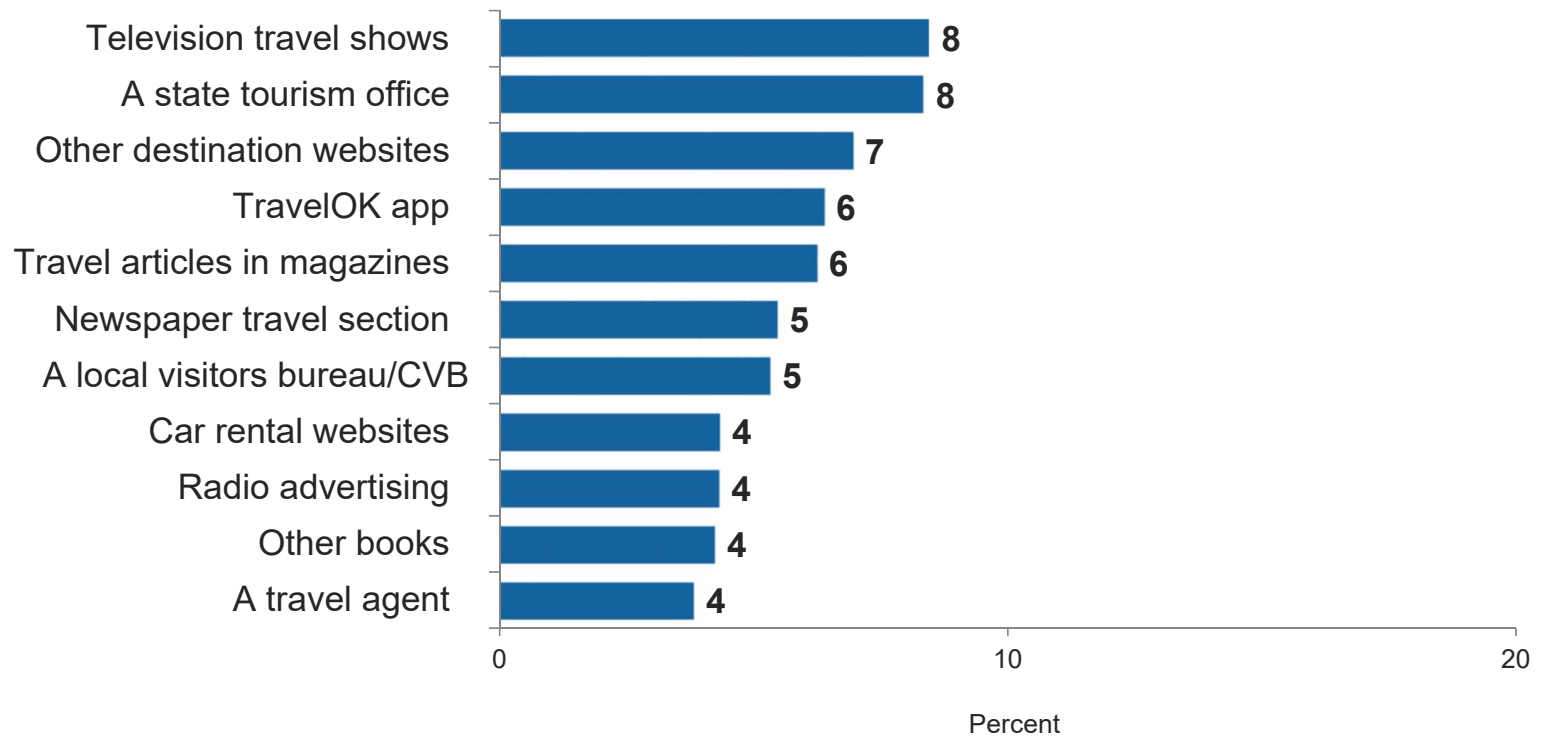
## Number of visits to website in 2019



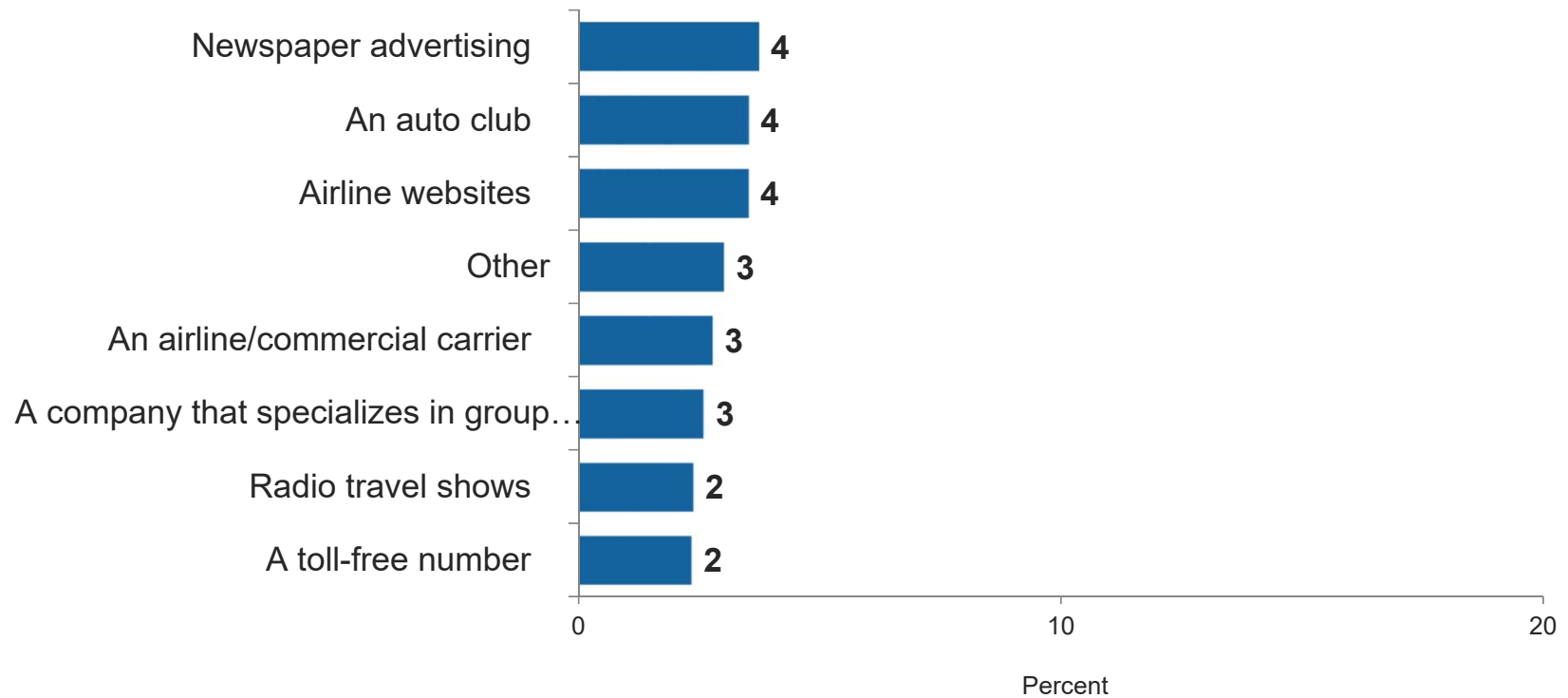
# Sources Used to Seek Information After Seeing Ads



## Sources Used to Seek Information After Seeing Ads (Cont'd)



## Sources Used to Seek Information After Seeing Ads (Cont'd)





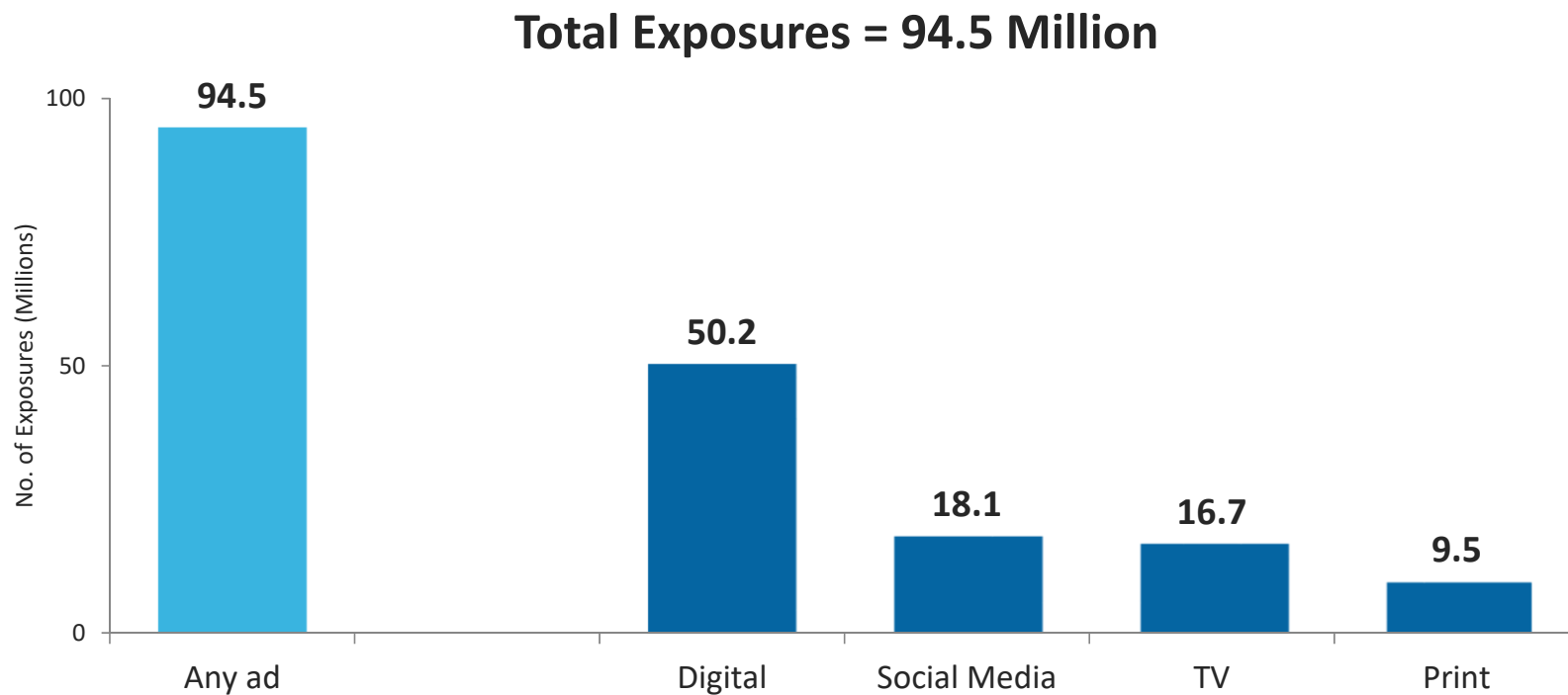
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## Media Diagnostics

# Advertising Awareness

- There were approximately 94.5 million exposures over the campaign period in Oklahoma's core markets.
- There were 50 million exposures to digital ads, followed by 18 million exposures to social media, 17 million for TV and 9.5 million for print ads.
- When we relate the number of ad exposures recalled to the specific amount of money spent on the ads by medium, we see that:
  - Social media, print, and digital ads constituted the most efficient medium in terms of generating recall per dollar spent.
  - TV was less efficient at generating recall than the other mediums.

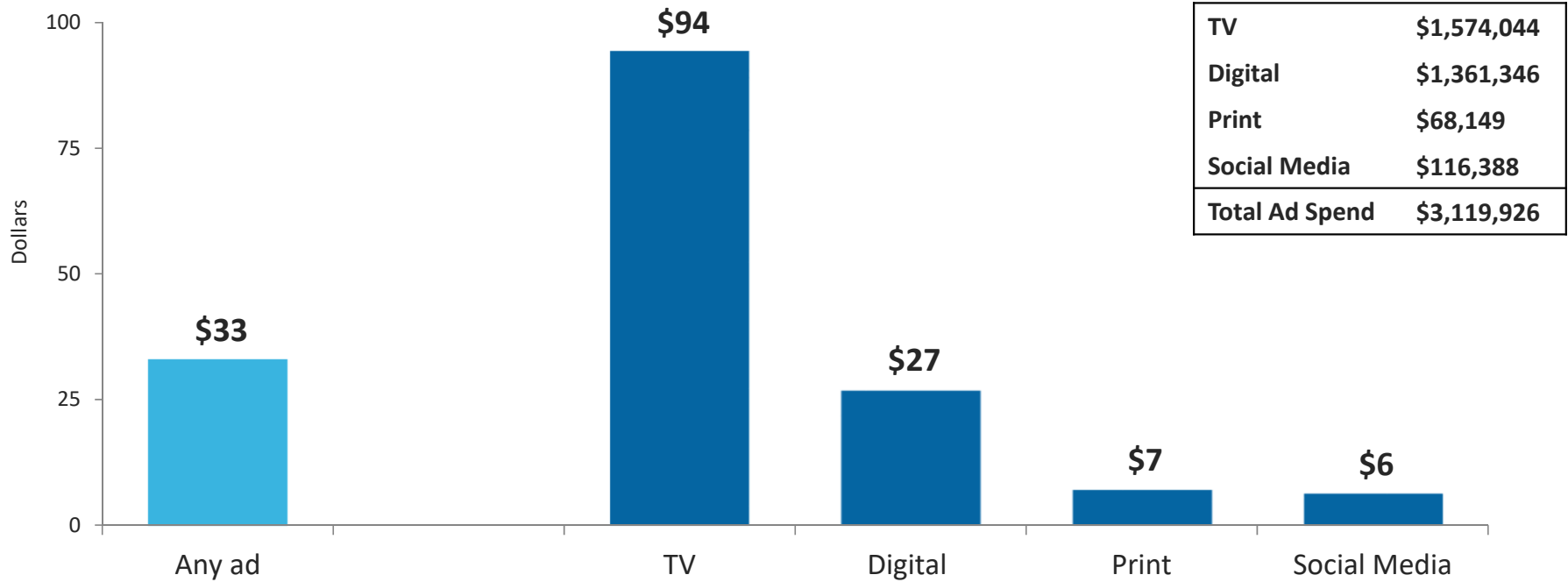
# Total Exposures Recalled by Medium

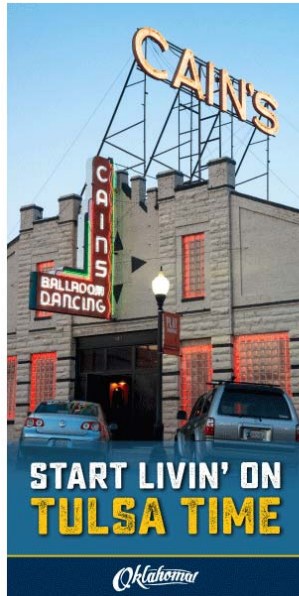


\*Incidence of awareness x population aware x mean frequency recalled

# Cost per Thousand Exposures Recalled – by Medium

Total Exposures = 94.5 Million





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## Short Term Conversion

# Advertising Impacts

- The campaign produced an additional 1.5 million trips to Oklahoma, that otherwise would not have materialized in the absence of advertising.
- Using TravelOK's estimates of average visitor expenditures, we estimate that these incremental Oklahoma visitors spent almost \$219 million while in Oklahoma.
  - When related to advertising costs of \$3.1 million, this translates into a return on investment of \$70 in visitor spending for each ad dollar spent.
- Those incremental expenditures yielded the following in taxes:
  - \$17.5 million in local taxes.
  - Return on investment of \$6 in taxes for each ad dollar spent.

# Short-Term Incremental Trips, Spending and Taxes Due to Advertising

Ad Investment  
**\$3.1M**



**1.5M**  
+26%  
from 2018

**Incremental  
Trips**

**\$218.7M\***  
+12%  
from 2018

**Incremental Visitor  
Spending**

**\$17.5M\*\***  
+13%  
from 2018

**Incremental  
Taxes**

\*Spending is based on \$215.20 per person for overnight trips and \$68.45 per person for day trips in 2018

\*\*Effective direct tax rate: 8.0% (4.6% state and 3.4% local)

# Campaign Efficiency

	2019
Ad \$'s per Trip	\$2.14
Trips per Ad \$	0.5

## The Bottom Line in 2019

**\$1**  
in advertising  
investment



**\$70** Spending ROI

**\$6** Tax ROI

Every \$1 invested in the 2019 Oklahoma advertising campaign generated \$70 in direct visitor spending and \$6 in taxes

## Longer-term Impact of Advertising – Intent to Visit Oklahoma

Intend to Visit Oklahoma in Next 12 Months*	
Overnight Trips	538,751
Day Trips	493,751
Total Trips	1,032,502

\* Among those who did not visit Oklahoma in 2019