



Oklahoma
2017
Advertising ROI
Research

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Research Objectives

- ✓ The purpose of this research was to provide an evaluation of Oklahoma's 2017 tourism advertising campaign in terms of:
 - ✓ Awareness of Oklahoma's advertising
 - ✓ The bottom line return on Oklahoma's investment in the campaign in terms of:
 - ✓ Incremental travel to Oklahoma
 - ✓ Incremental traveler spending in Oklahoma
 - ✓ Incremental state and local taxes generated

Research Method

- ✓ The study was conducted among a representative sample of adult travelers residing in Oklahoma's advertising markets*.
 - ✓ "Travelers" are respondents who had taken a day and/or overnight trip for pleasure in the past 3 years and intend to take another in the next 2 years.
- ✓ The survey was conducted via a major North American online consumer panel which is demographically balanced to represent the national population.
 - ✓ *1,401 individuals responded to the survey*

*Survey sample markets were Oklahoma, Dallas-Ft. Worth TX, Wichita Falls TX, Amarillo TX, Austin TX, San Antonio TX , Houston TX, Ft. Smith/Fayetteville AR, Little Rock AR, Kansas City MO/KS, Springfield MO, St. Louis MO, Wichita, KS
Sample allocation was proportional to population

Research Method (Cont'd)

- ✓ Questionnaire content included:
 - ✓ **Travel to Oklahoma**
 - ✓ *Respondents reported the number of day and overnight trips they took to Oklahoma during the advertising campaign and shortly after.*
 - ✓ **Advertising Awareness**
 - ✓ *Actual creative from the January to June 2017 campaign was exposed and respondents reported recall of each.*
 - ✓ *We use this forced exposure approach to ensure that we are measuring the state-sponsored advertising only – not that of other Oklahoma destinations or private-sector businesses*

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, catastrophic weather events, prior visitation, etc.*



Main Findings



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Short Term Conversion



Advertising Impacts

- ✓ The campaign generated 917,519 incremental trips that would not otherwise have taken place, which brought almost \$135.9 million in incremental visitor spending and \$10.7 million in state and local taxes.
- ✓ Every \$1 invested in the Oklahoma ad campaign in the evaluated markets generated \$75 in visitor spending and \$6 in tax revenue for the benefit of Oklahoma residents.
- ✓ It cost \$1.98 in advertising to generate each incremental trip.
- ✓ In addition to the short-term impacts, we estimate that the advertising has influenced the planning of a further 1.5 million trips to Oklahoma in 2017 and 2018. Although not all of these trips will happen, we expect that a sizeable number will convert, adding significantly to the return on Oklahoma's investment in tourism marketing.

Incremental Trips, Spending and Taxes Due to Advertising

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

*Spending is based on \$200.25 per person for overnight trips and \$64.69 per person for day trips in 2016

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

The Bottom Line in 2017

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

Every \$1 invested in the 2017 Oklahoma advertising campaign generated \$75 in direct visitor spending and \$6 in taxes in the state

2017 Campaign Efficiency

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

Longer-term Impact of Advertising – Intent to Visit Oklahoma

Intend to visit Oklahoma in Next 12 Months*	
Overnight Trip Intenders	809,311
Day Trip Intenders	715,421
Total Intenders	1,524,736

* Among those who did not visit Oklahoma in 2017



Advertising Awareness

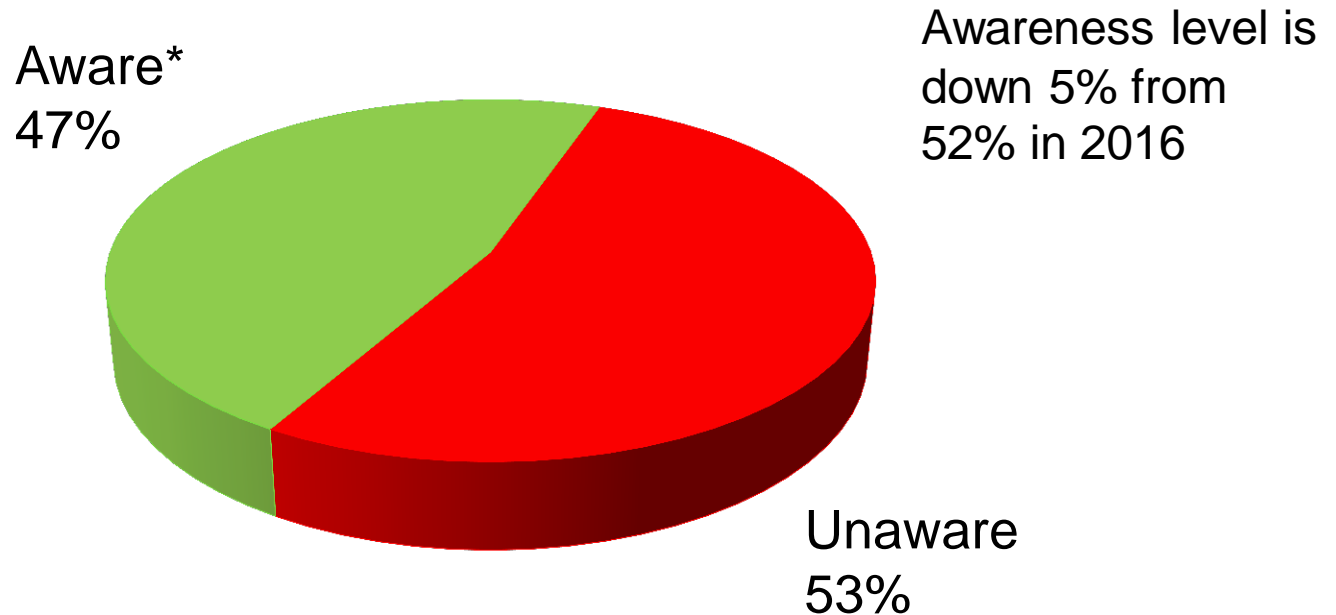


Advertising Awareness

- ✓ As a result of the 2017 campaign, awareness in Oklahoma's advertising markets was 47% across all media. The awareness level decreased 5% from 52% in 2016, back to the same level as for the 2015 campaign.
- ✓ Among those who saw Oklahoma ads in several types of media, ad recall was highest for social media (35%) and print ads (32%), followed by digital ads (28%) and TV (26%).
 - ✓ Among the individual media types, Social Media ad awareness was similar for the videos, but slightly lower for the Facebook ads.
 - ✓ Print ad awareness was highest for the Midwest Living ad and lowest for the Tulsa Visitor's Guide.
 - ✓ Digital ad awareness was similar across the different ads, but of the two video ads that were shown on TV, the "Quiet/Loud" ad had higher awareness than the "Vacation" ad.

Awareness of the Ad Campaign

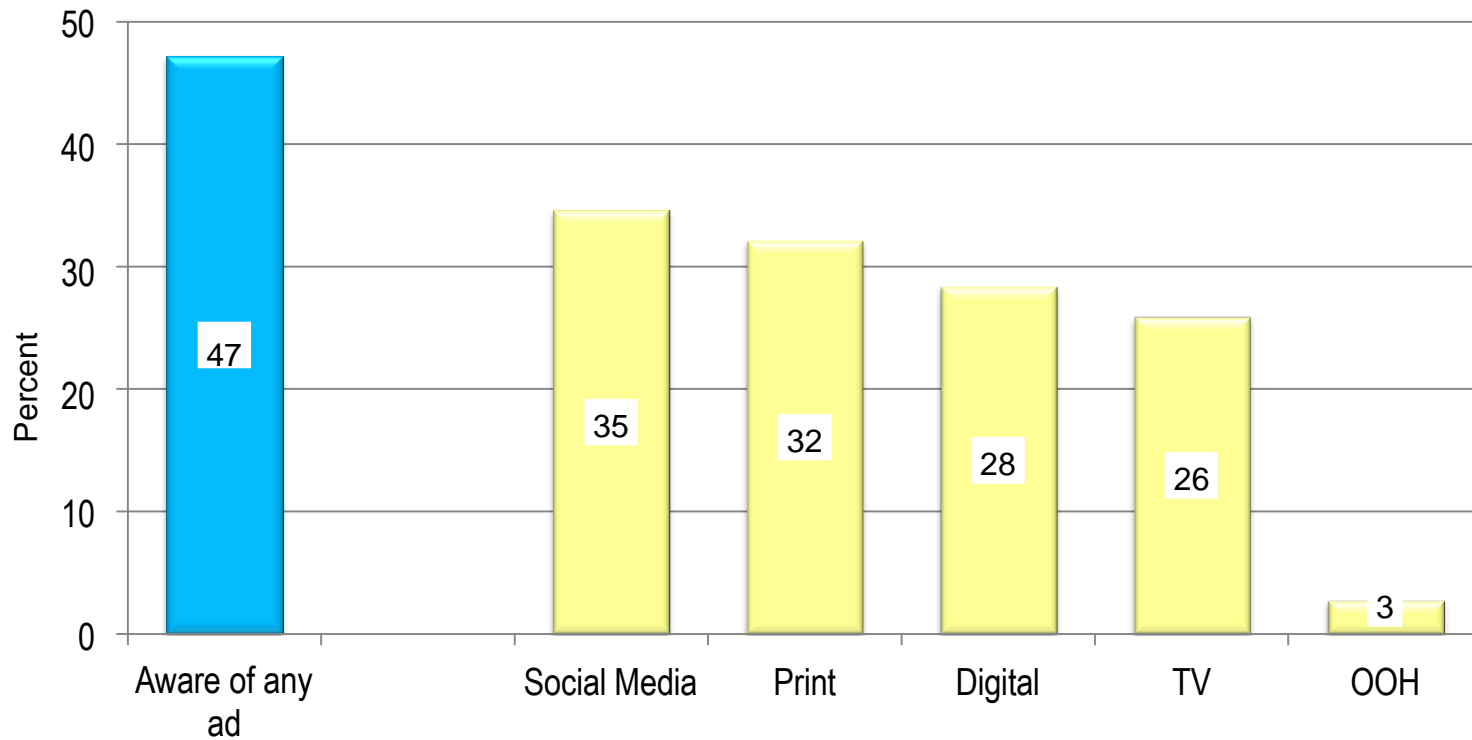
Base: Total Travelers



*Saw at least one ad

Advertising Awareness* by Medium

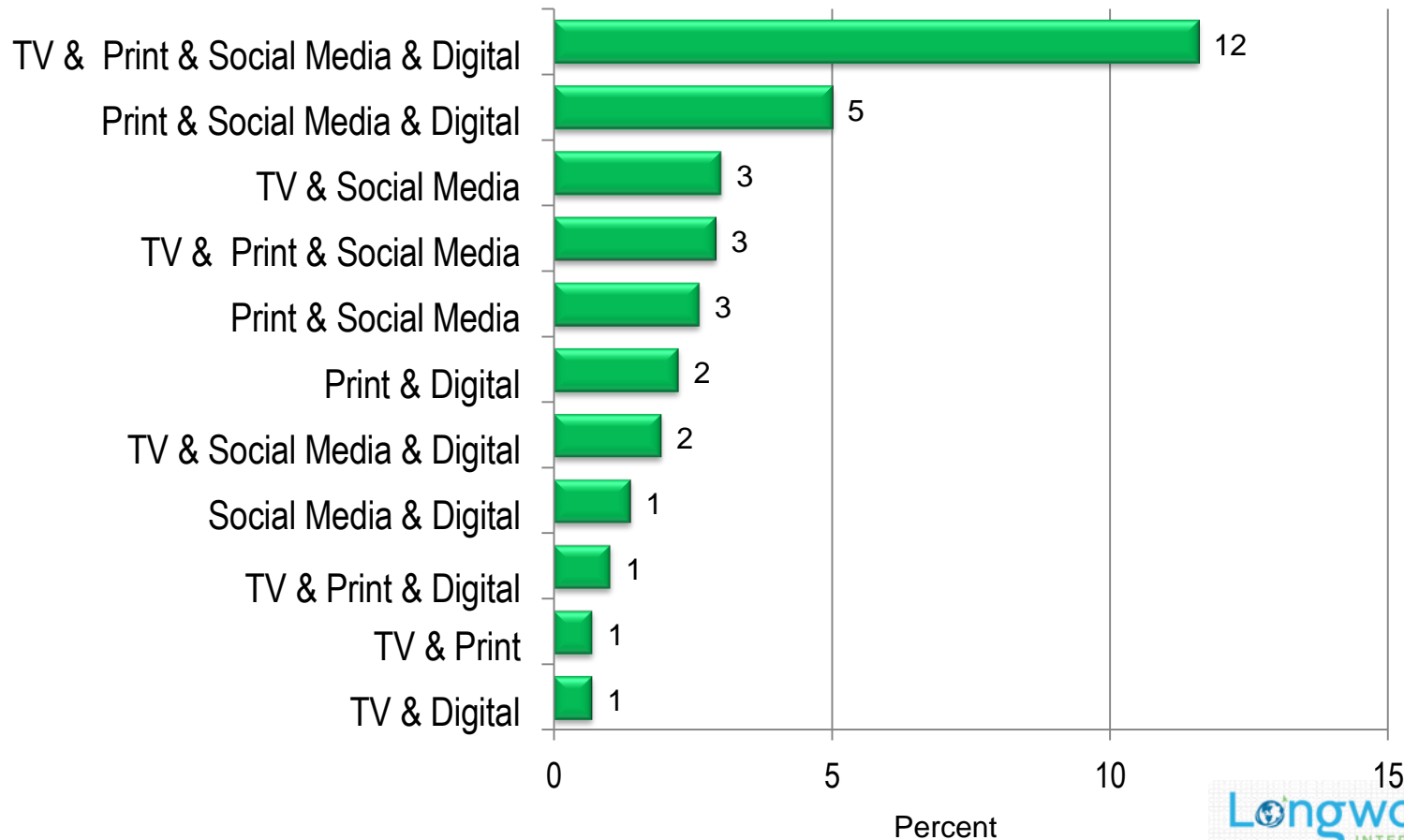
Base: Total Travelers



*Saw at least one ad

Awareness by Media Combinations

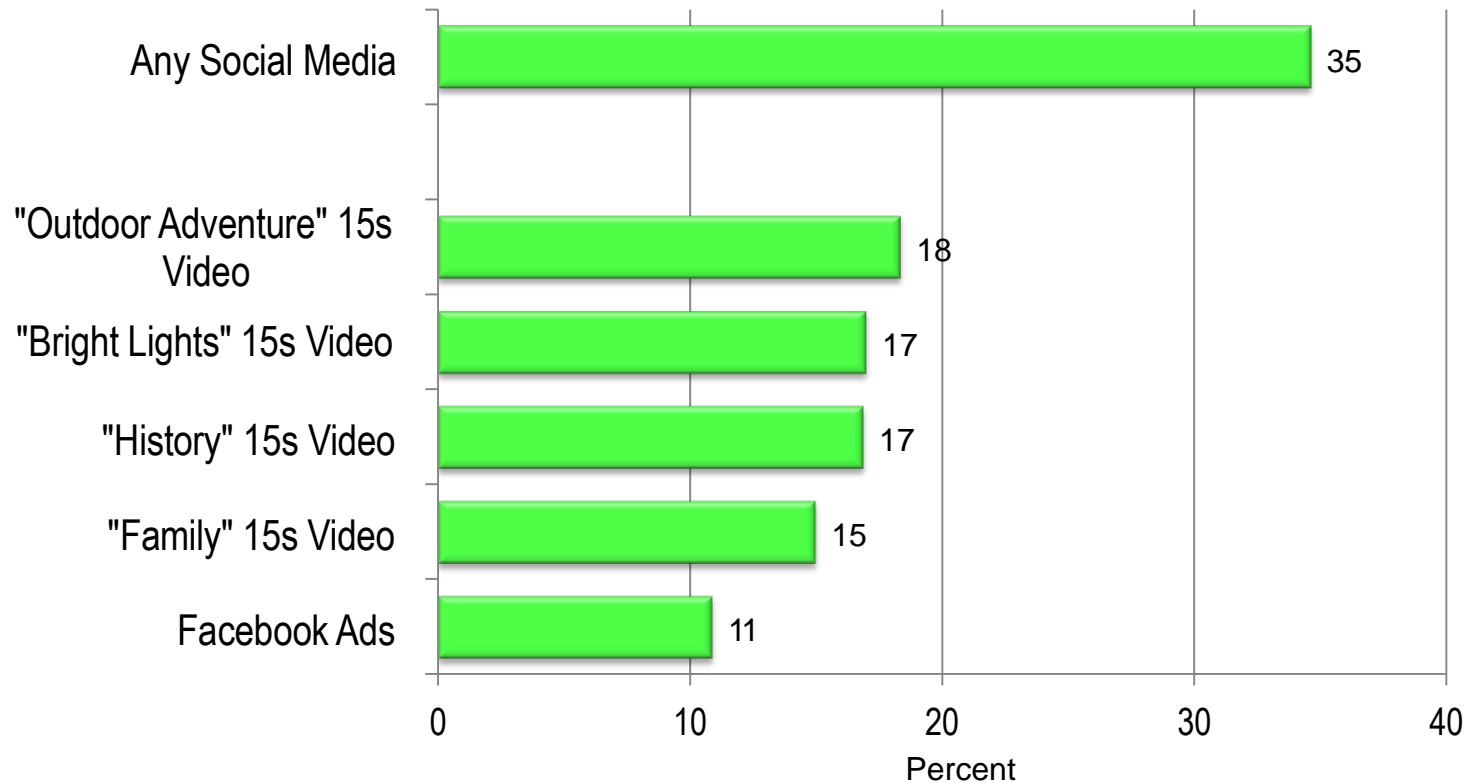
Base: Total Travelers



Awareness of Individual Ads*

— Social Media

Base: Total Travelers

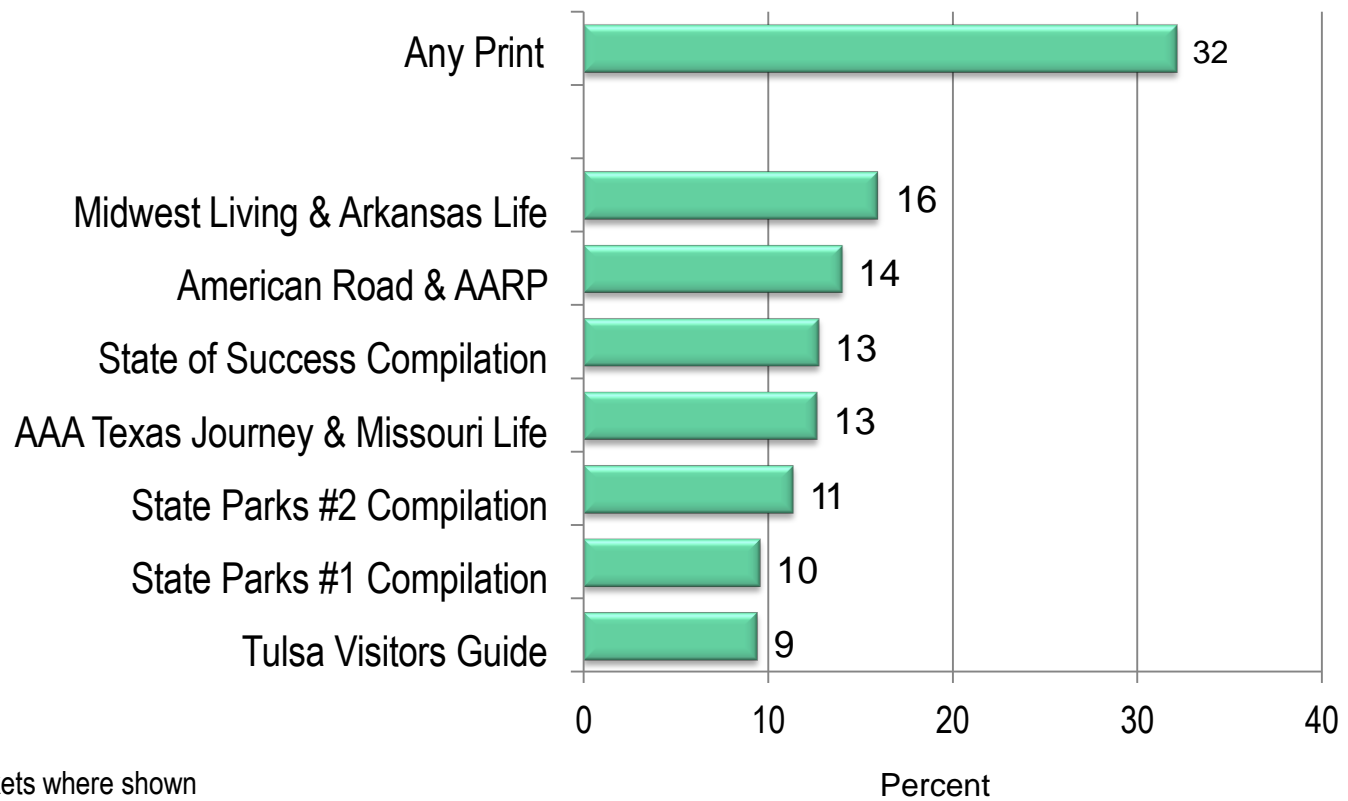


*Based on markets where shown

Awareness of Individual Ads*

— Print

Base: Total Travelers



*Based on markets where shown

Digital Creative

Museums

EXPLORE

Thousands of artifacts. The largest collection of Western art in the world.

500+ museums and the largest collection of artifacts. Zero fiction.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Native American

DISCOVER

Break with tradition to explore native traditions.

the native traditions and storied cultures of 30+ tribal nations.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Nightlife

ATTEND

1,000+ concerts, festivals and events in Oklahoma's bright, booming cities.

Nightlife for days.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Outdoor

VENTURE

All roads lead to roam.

the most diverse terrain in America.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Route 66

TOUR

A photo op at every stop.

the most driveable miles of Route 66 in America.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Western

SAY

Saddles, shootouts and sarsaparilla.

howdy to the true Wild-West experience.

ORDER YOUR FREE BROCHURE

COME SEE FOR YOURSELF!

Facebook

Oklahoma Tourism

Before you head outside, get the inside scoop.

FREE 2017 OKLAHOMA OUTDOOR GUIDE

Opens up to adventure. Wander over to TravelOK.com and order your FREE Outdoor Guide today!

Oklahoma Tourism

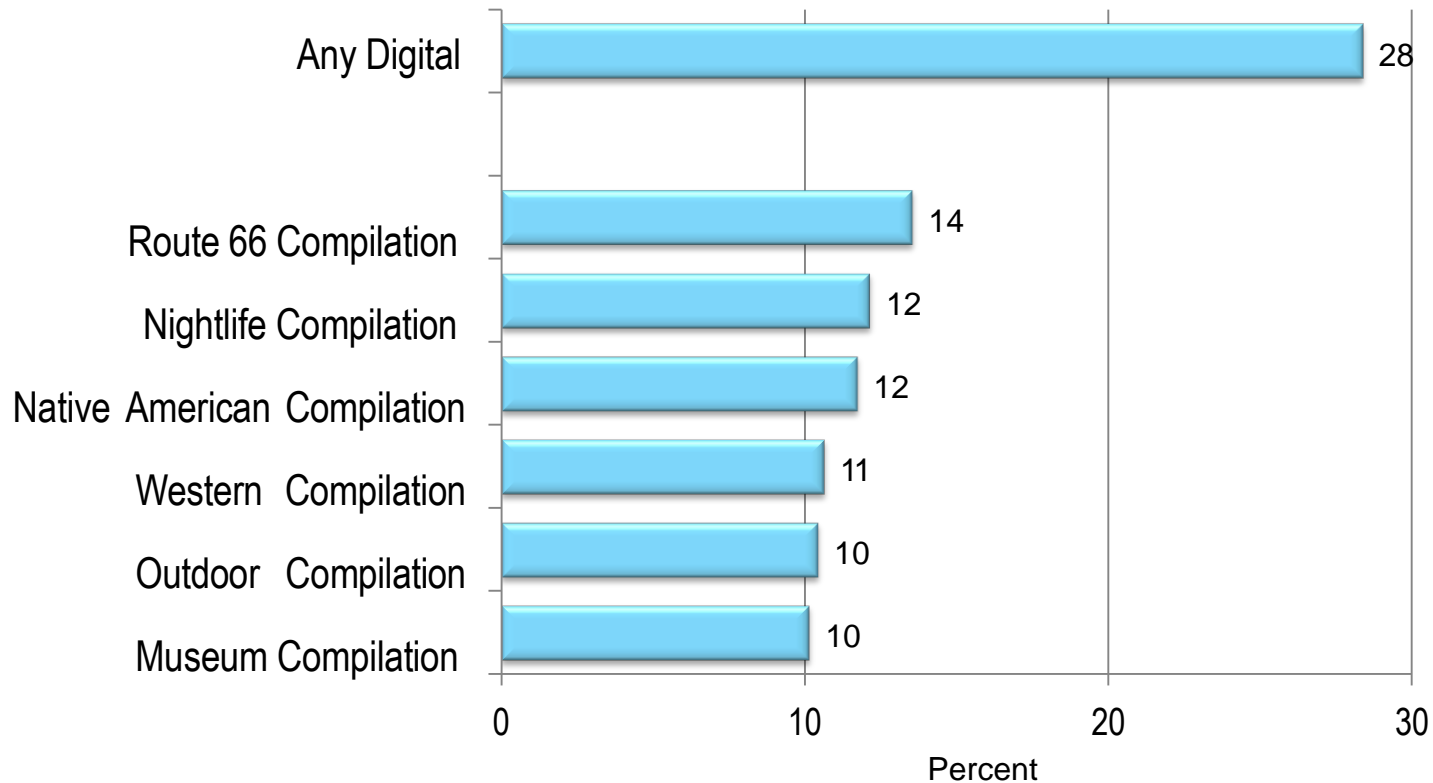
Wondering where to wander? Wonder no more.

FREE 2017 OKLAHOMA TRAVEL GUIDE

A world of wonder awaits. Wander over to TravelOK.com and order your FREE Travel Guide today!

Awareness of Individual Ads* — Digital

Base: Total Travelers

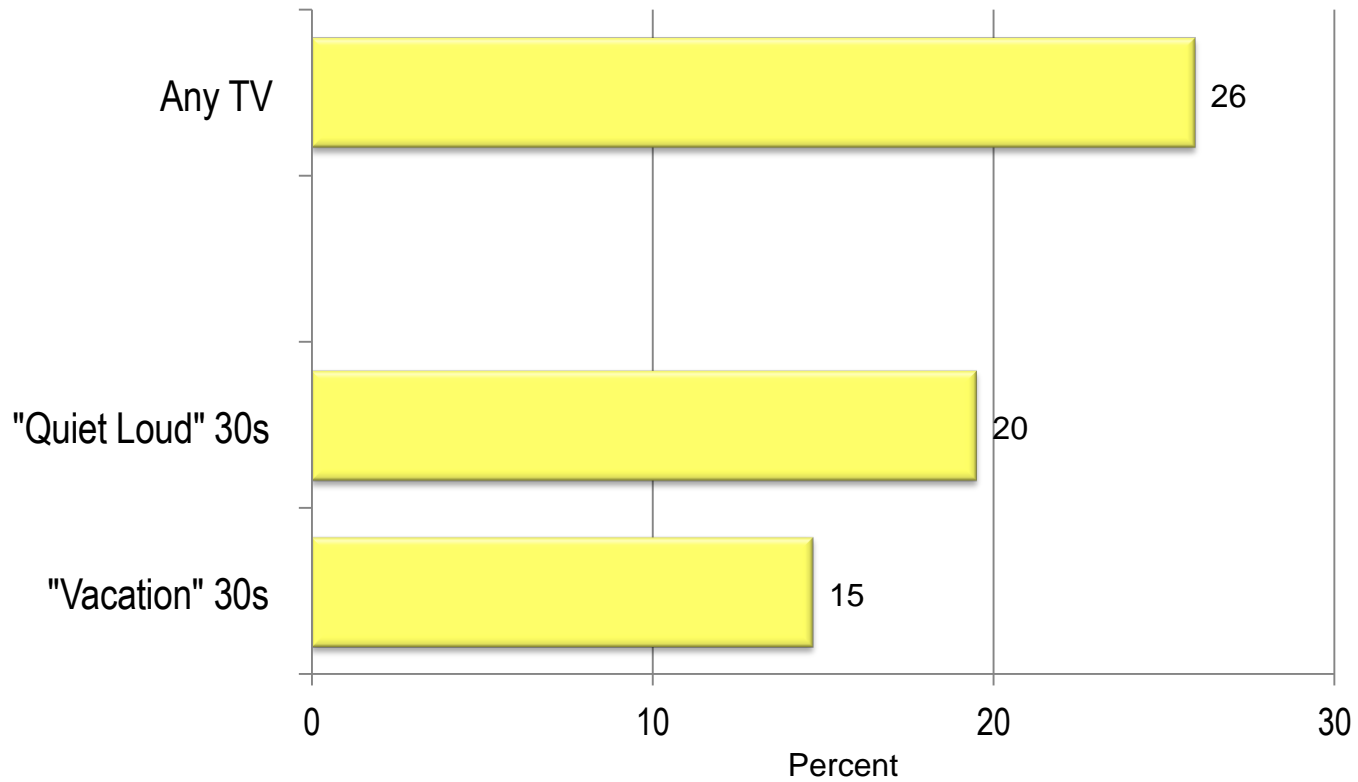


*Based on markets where shown

Awareness of Individual Ads*

— TV

Base: Total Travelers

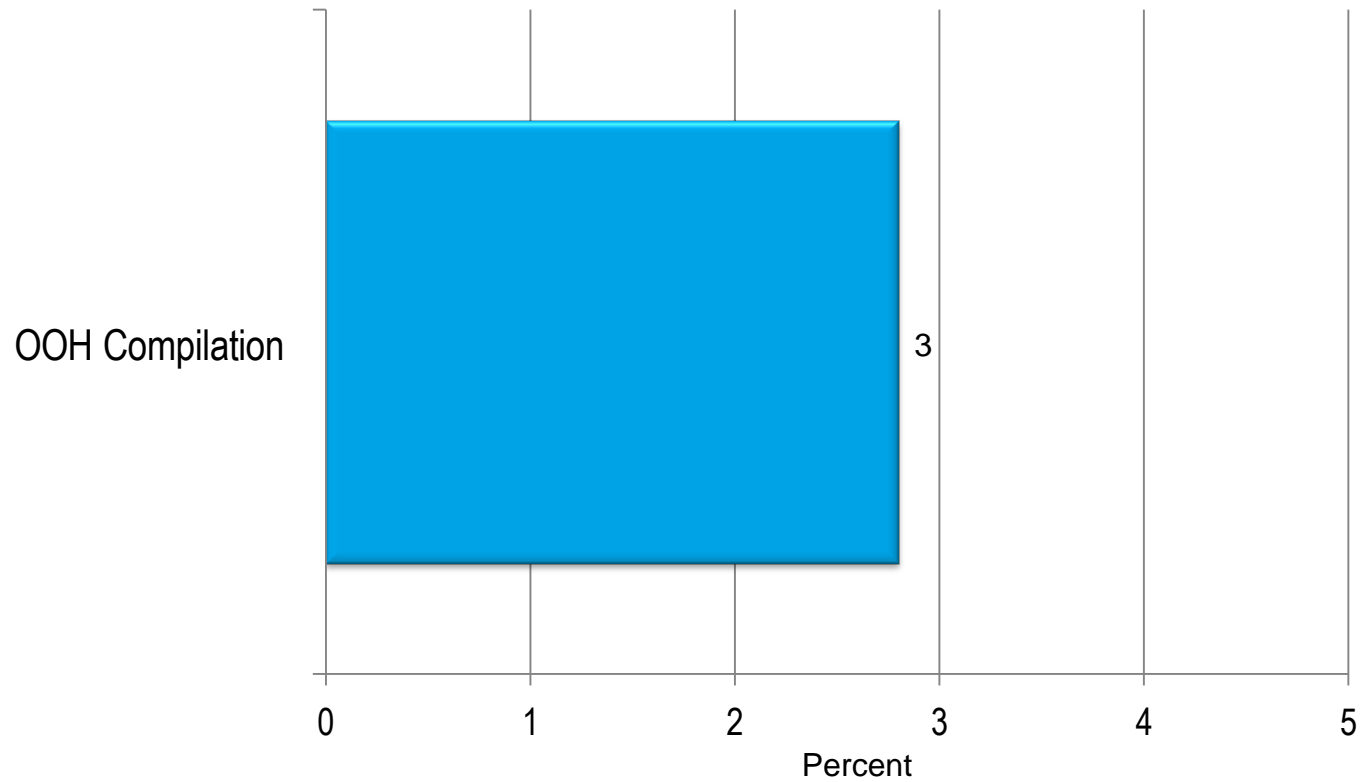


*Based on markets where shown

Awareness of Individual Ads*

— OOH

Base: Total Travelers



*Based on markets where shown

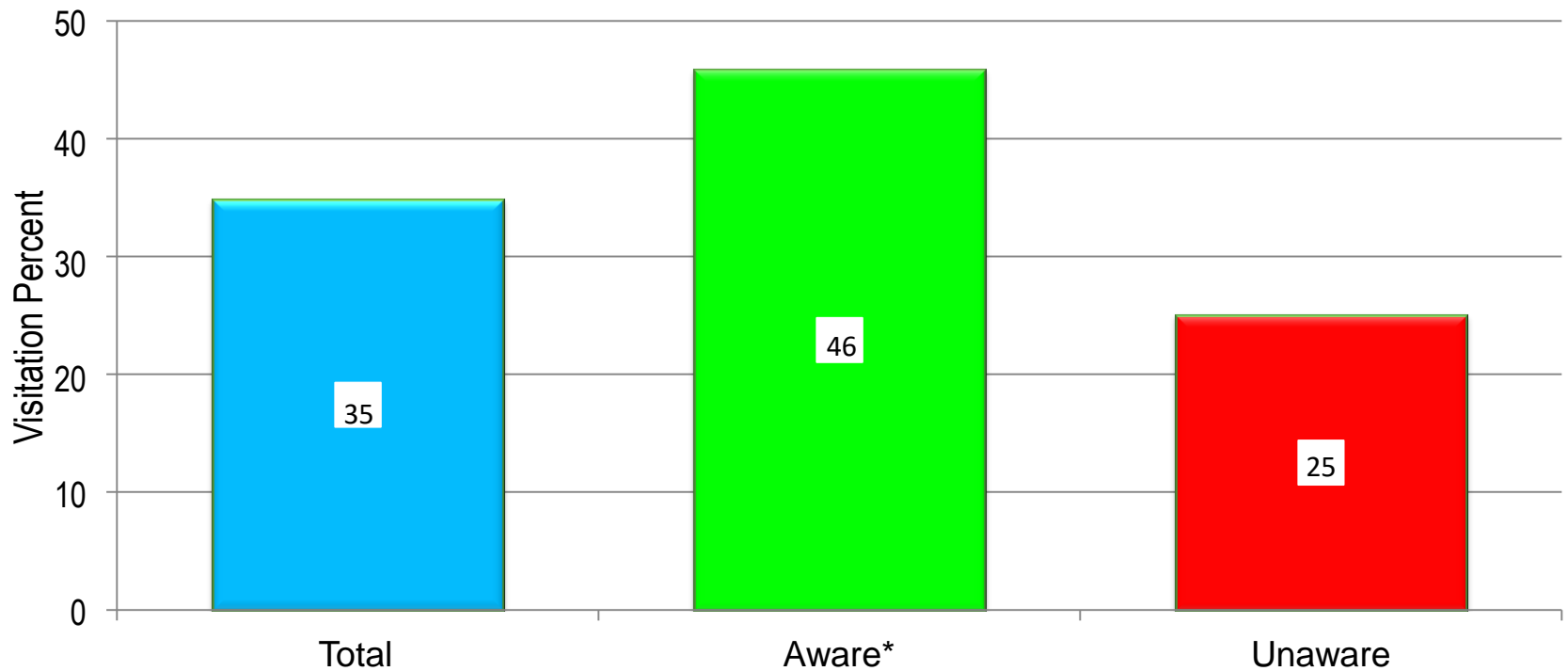


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Media
Diagnostics

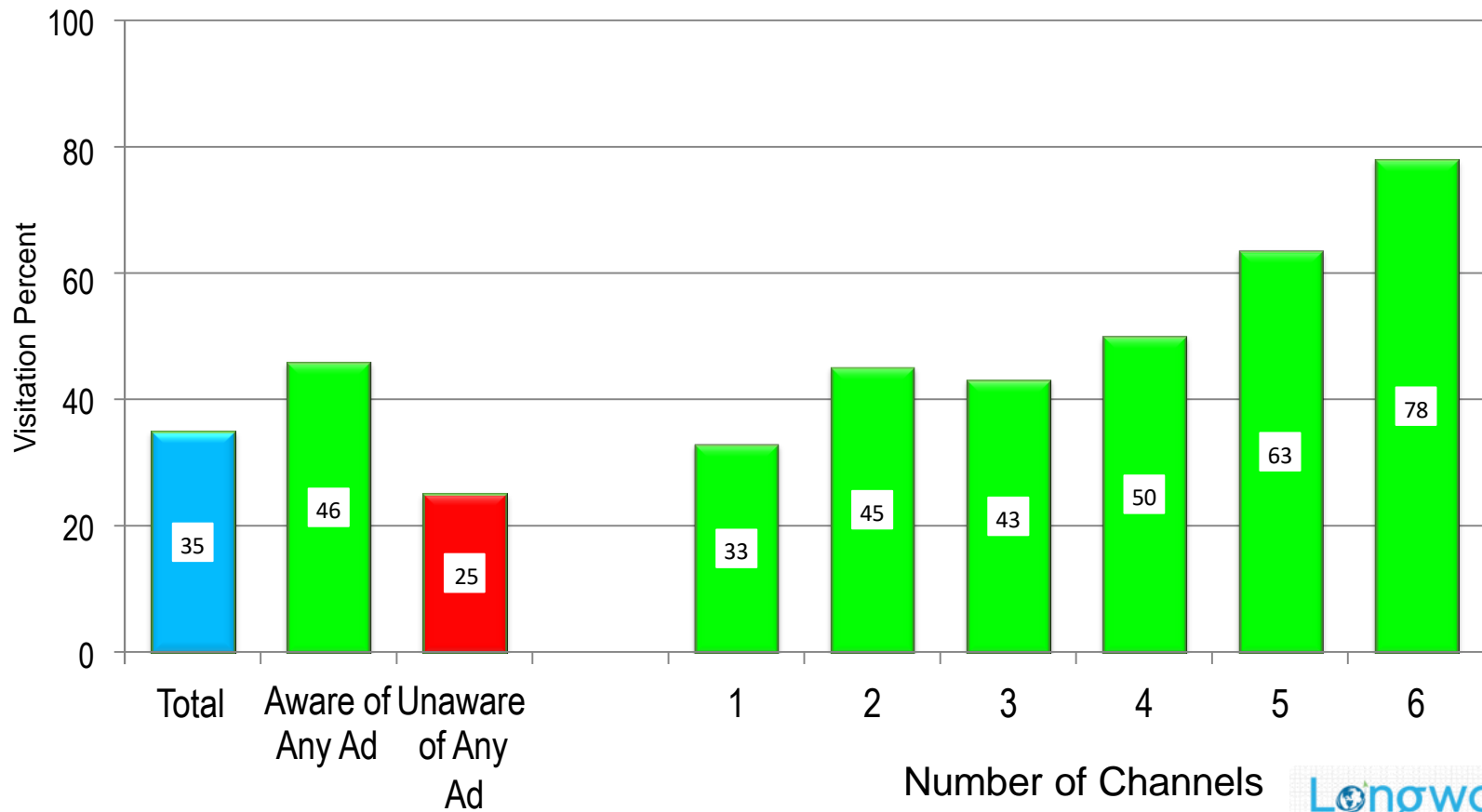
Impact of Advertising on Trip Taking

Base: Total Travelers

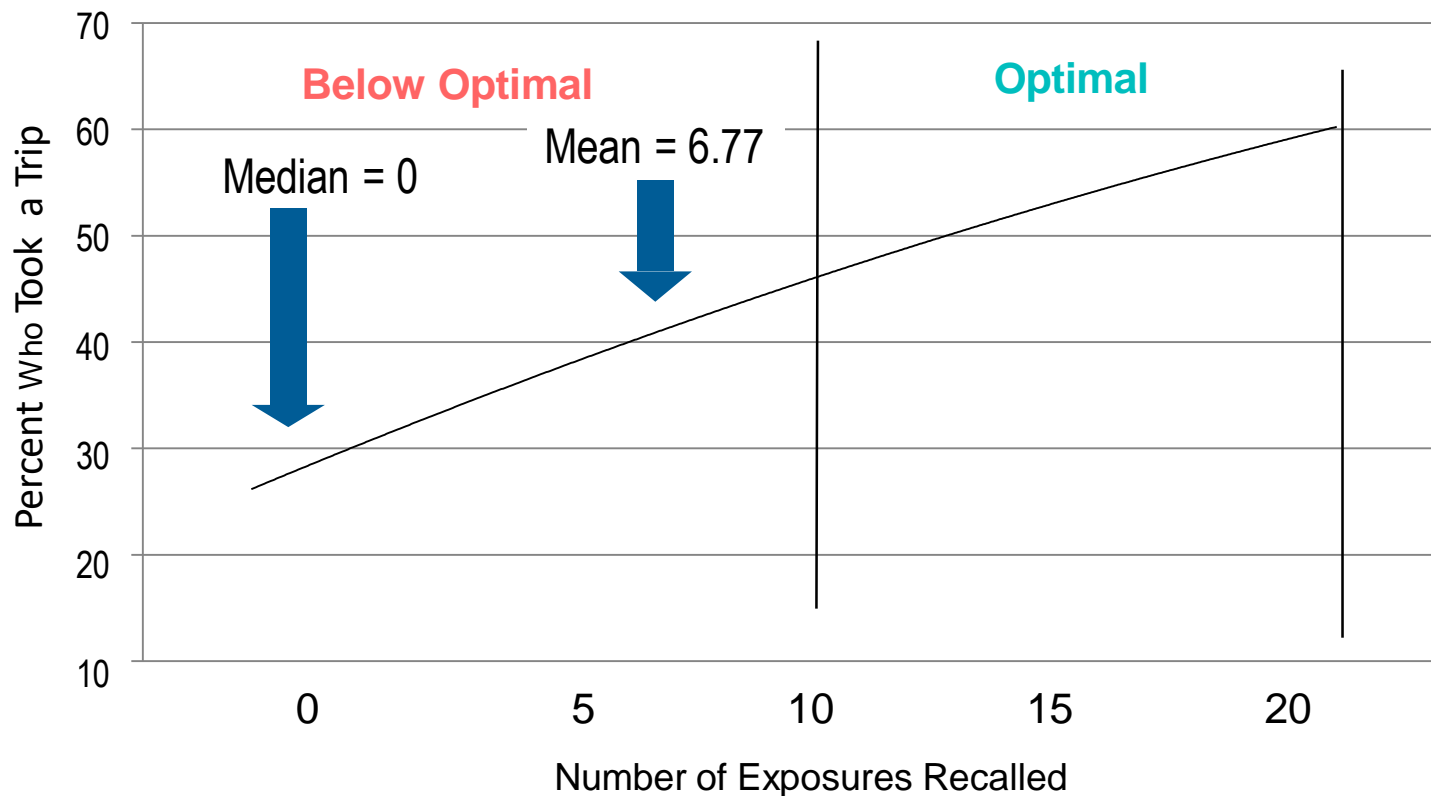


Impact on Visitation to Oklahoma by Number of Media Channels

Base: Total Travelers



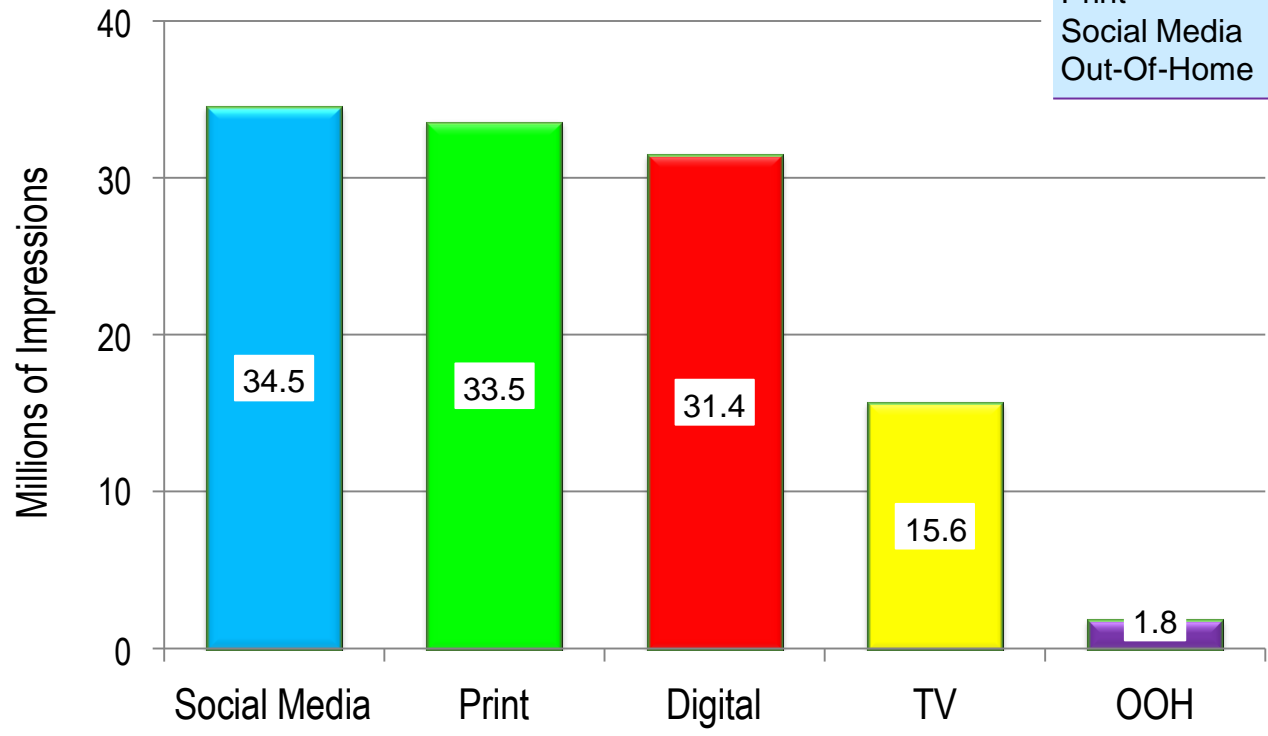
Impact on Trip-taking by Number of Ad Exposures Recalled



Total Impressions by Media

Base: Total Travelers

Media Spend:	
Digital	\$1,039,396
TV	\$699,178
Print	\$54,446
Social Media	\$12,936
Out-Of-Home	\$9,920



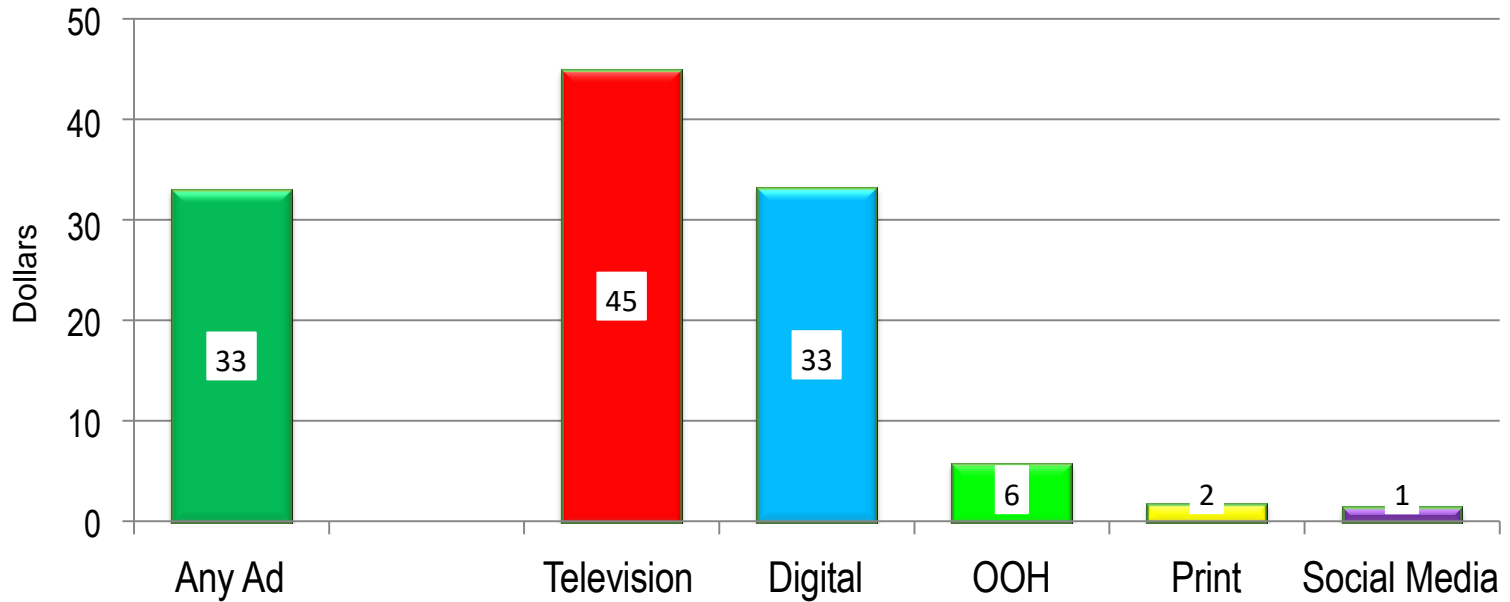
Cost Per Thousand Exposures – By Medium

Base: Total Travelers

Total Exposures = 116.8 Million

Media Spend:

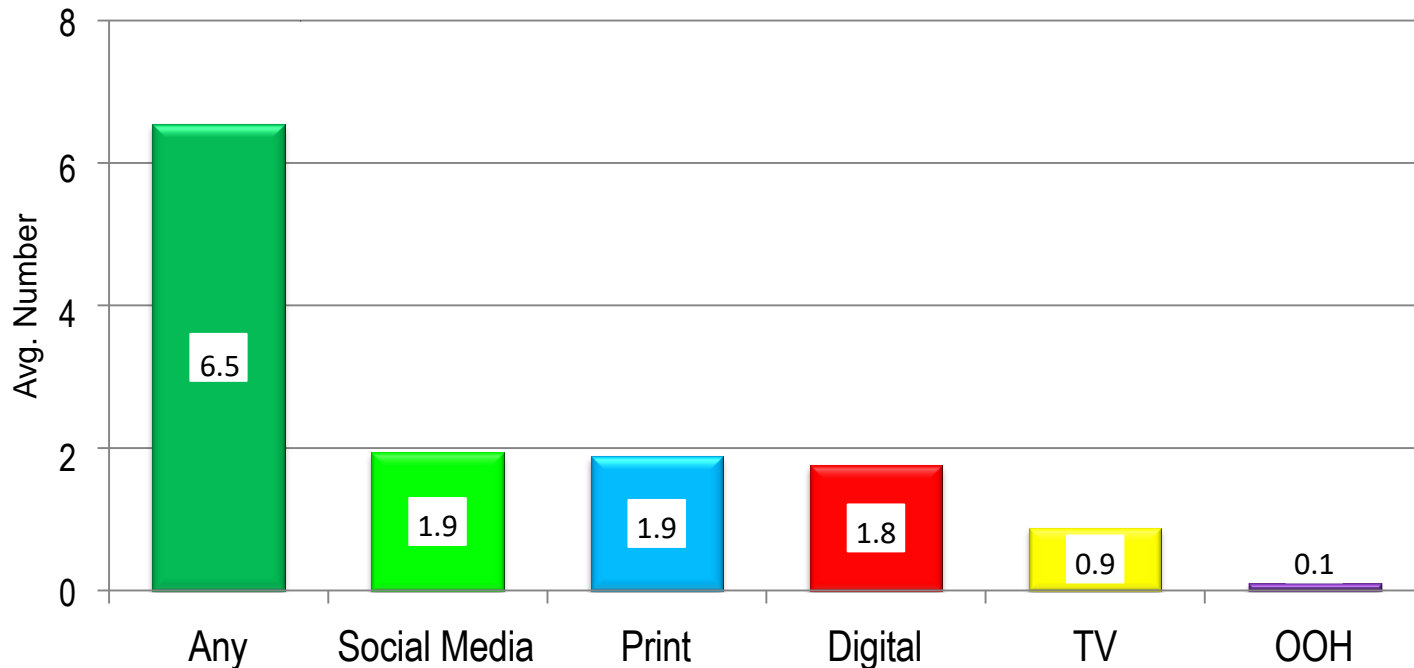
Digital	\$1,039,396
TV	\$699,178
Print	\$54,446
Social Media	\$12,936
Out-Of-Home	\$9,920



Frequency of Ad Exposure Recalled*

Base: Total Travelers

Total = 116.8 Million Exposures



*Saw at least one ad

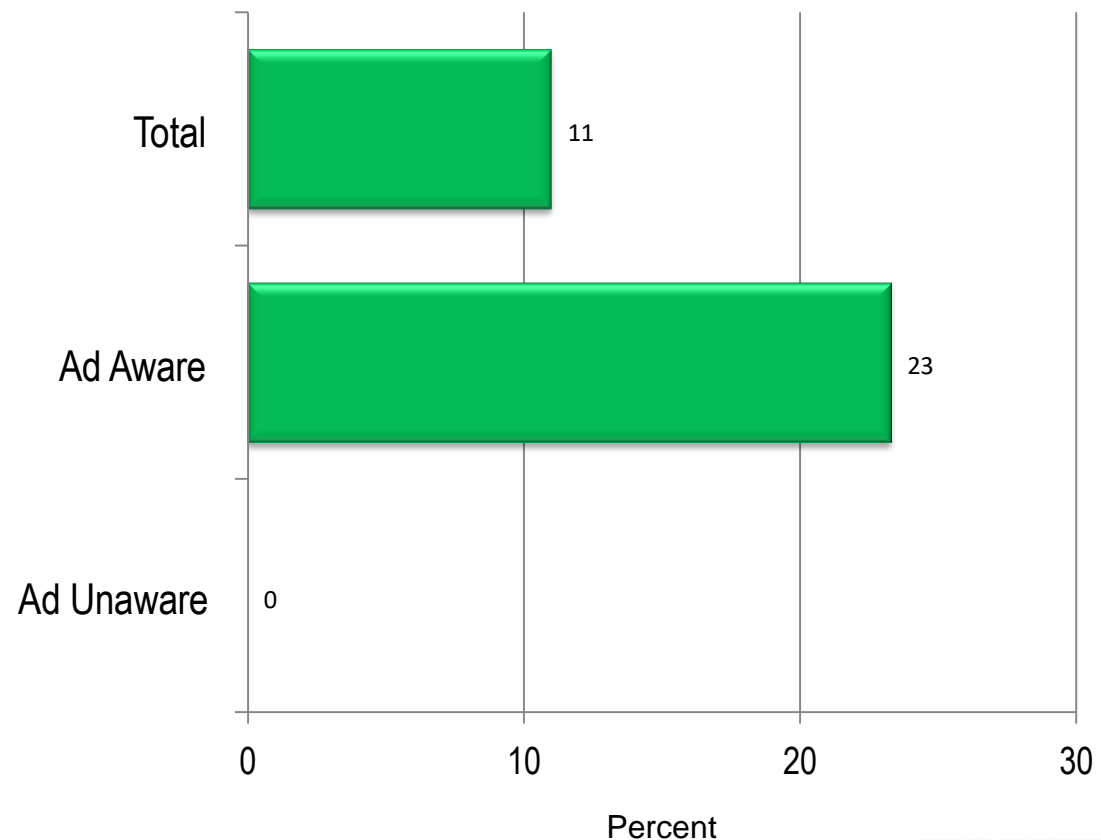


Impact of Ads on Visiting TravelOk.com website and on Trip Planning



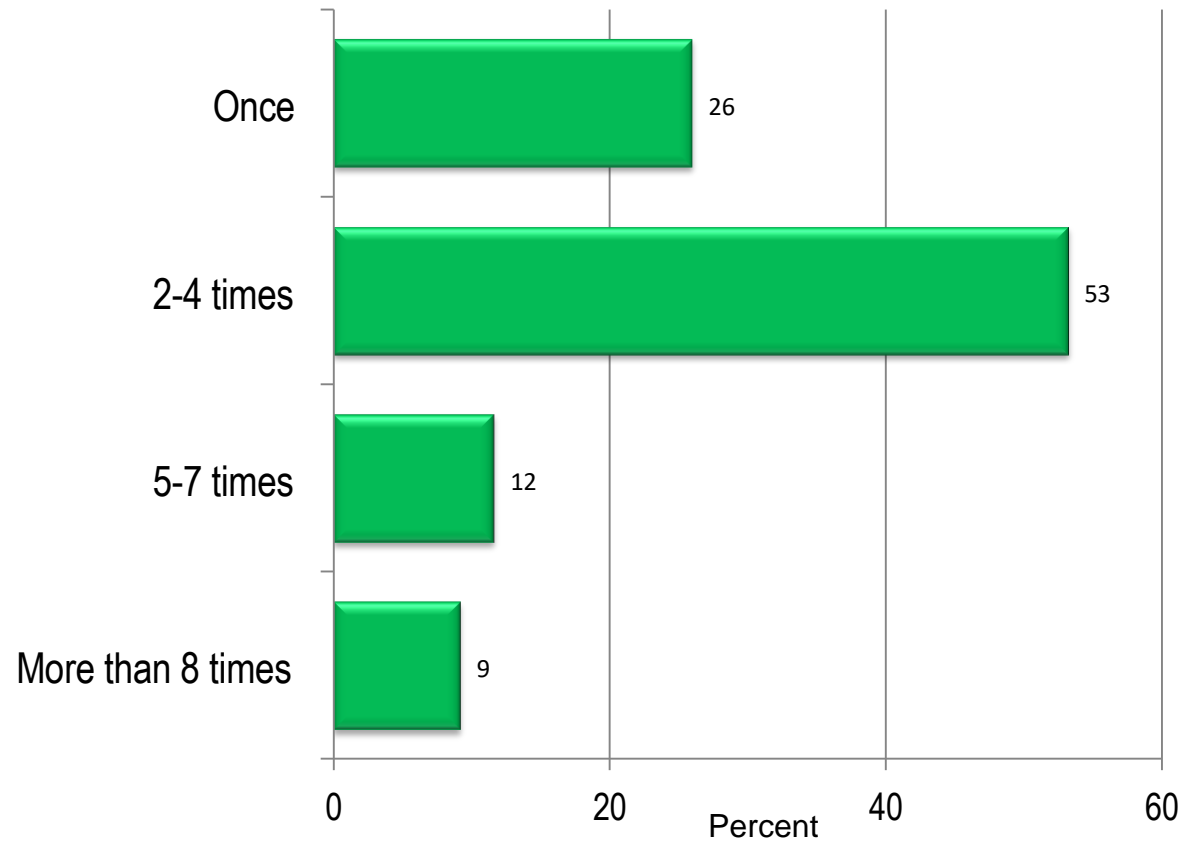
Visited Travel Website TravelOK.com by Advertising Awareness in 2017

Base: Total Travelers



Number of Times Visited Travel Website TravelOK.com in 2017*

Base: Visited TravelOK.com



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

Base: Total Travelers



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

Base: Total Travelers

