

Calendar Year 2014 – Oklahoma TravelsAmerica Visitor Profile Report



Calendar Year 2014 – Oklahoma
TravelsAmerica Visitor Profile Report

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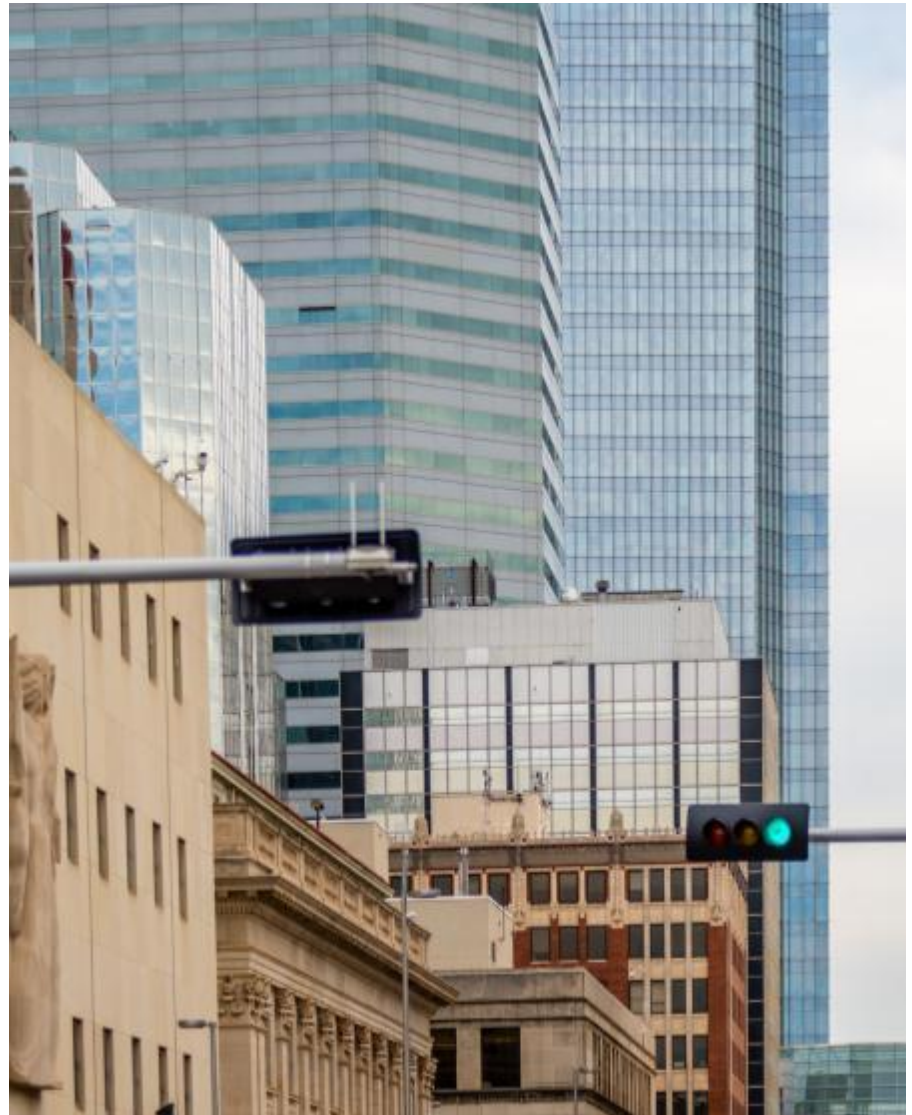
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Background and Research Methods 61



1

Growth Summary



Growth Summary



Growth insights

- Encouraging those living in or traveling to border states to add or extend trips to nearby Oklahoma could help attract new visitors.
- Target high-spending groups to boost Oklahoma tourism revenue, particularly young *Adventure Sports enthusiasts* and relatively older *Sightseers*.
- The largest type of visitors, *Family/Friend/Reunions (VFR)* warrant less attention; they will likely visit regardless of Oklahoma Tourism and Recreation Department efforts and spend less than any other type.
- The next largest group comes for *entertainment and* spends much more than VFR travelers.
- Travel more heavily depends on online resources for research and purchase than any other industry, so online marketing is an efficient means for Oklahoma to reach potential visitors.
- Separately, the “Explore Oklahoma” theme is a good example of highlighting activities that can build synergy throughout various media.

Note: See glossary for activities describing each type (slide 64)

Precise plans for growth

- Maintain focus on communications in-state and in larger nearby Western markets, within driving distance, as advertising budgets allow.
- Highlight messaging on activities that attract younger visitors and larger spenders, particularly Oklahoma’s numerous state/national parks (34 state parks and 6 national sites/areas/ trails) and opportunities to engage in adventure sports.
- Entice sightseers (both rural and urban), not only by the vast array of parks and beautiful scenery, but also Oklahoma’s unique history and culture.
- Consider ways to tap *Family/Friend/Reunion* visitors as ambassadors for Oklahoma as well as encourage them to “Explore Oklahoma.”
- Continue to build an online presence to reach potential travelers, particularly young adventure travelers, with the already excellent website and also owned social media sites (Facebook, Instagram, Twitter, etc.). “Explore Oklahoma” weaves a theme throughout messaging to attract these visitors.

2

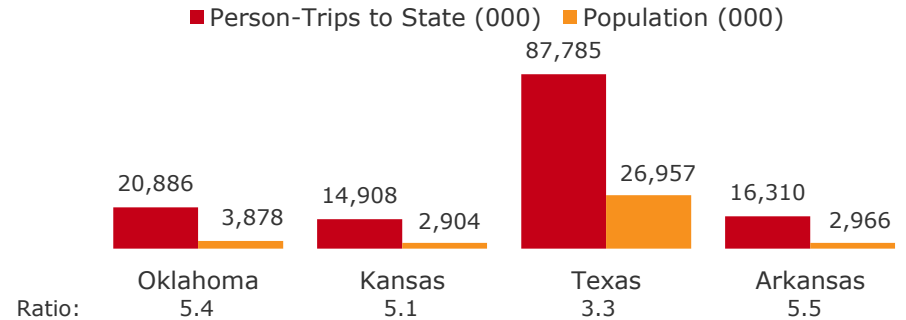
Executive Summary



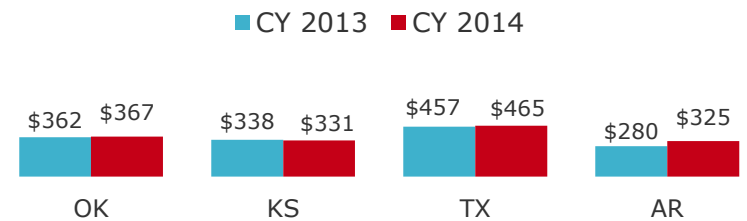
Tourism = Important to Oklahoma

- Financially, tourism brings revenue, not only directly to industry businesses, but in taxes (sales/lodging/etc.). "Visitors per person" helps to show the relevance of tourism to Oklahoma. The ratio, with 5 visitors per person, shows Oklahoma as similar to Kansas and Arkansas and it draws more visitors per resident than Texas.
- Oklahoma visitors spend at competitive levels. Both Oklahoma and Texas post small gains in spending from visitors from a year ago; Arkansas climbs a bit more, but from a lower starting point; Kansas loses ground.
- With a nearly even "balance-of-trade," Oklahoma draws enough tourism from out-of-state visitors to offset what residents spend by traveling elsewhere (import). Domestic spending boosts Oklahoma to a substantial surplus.
- The small drop in "export" spending suggests that Oklahoma could re-emphasize its features to encourage out-of-state visitors to spend more time and \$\$\$ while there.

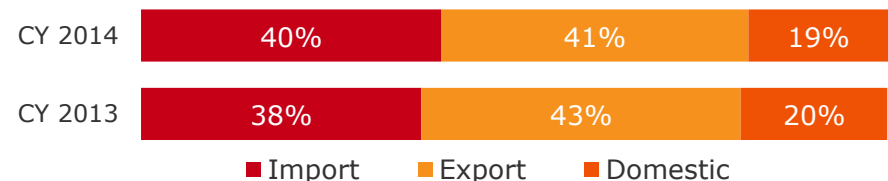
Visitors vs. Population



Total Spending



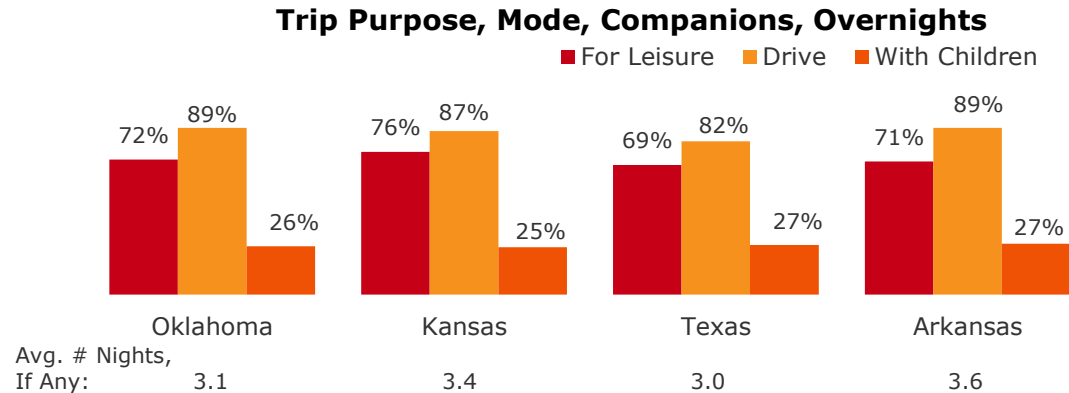
Balance of Trade



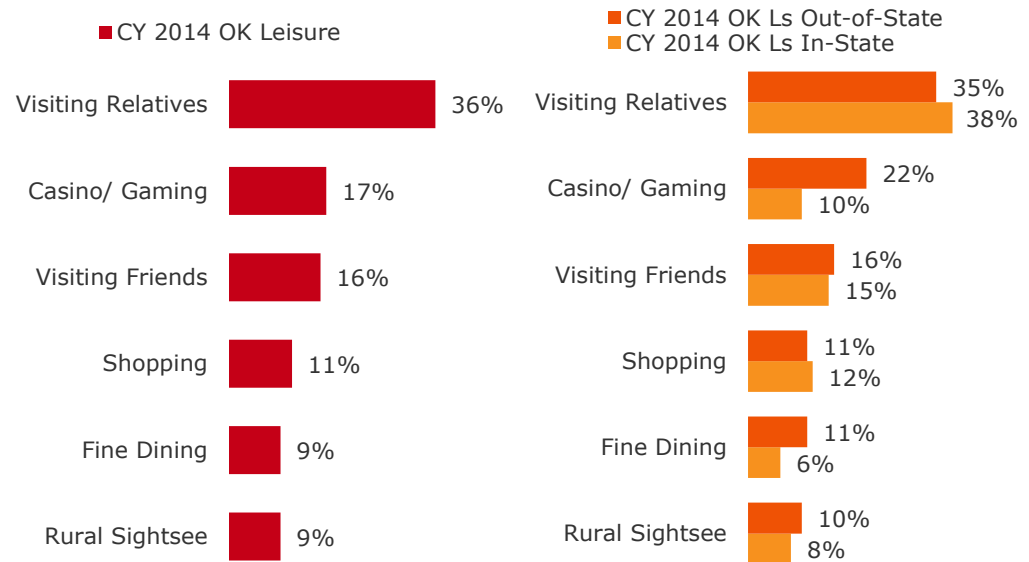
Import represents \$ leaving OK
 Export represents \$ coming into OK
 Domestic represents \$ staying in OK

Why visitors come to Oklahoma; what they like

- Similar to competitive states, Oklahoma primarily entertains leisure visitors, most visitors drive, and the average stay hovers between 3 and 4 nights. About a quarter of visitors to each of these states bring their children.



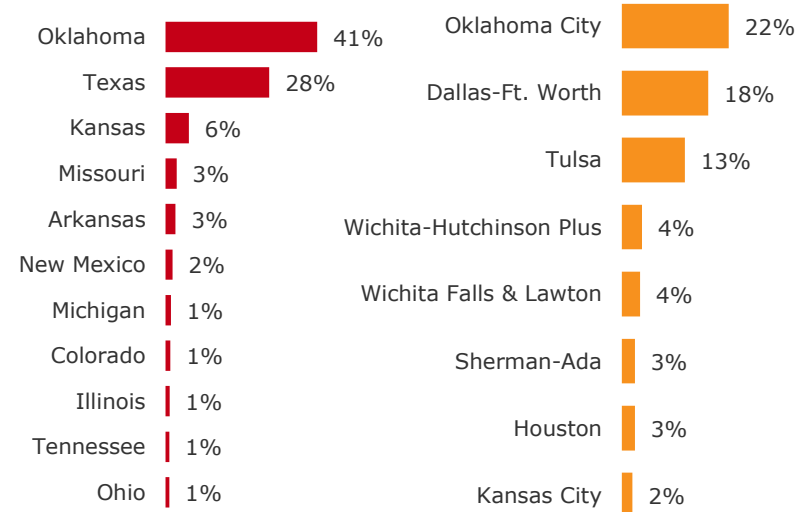
- Both in- and out-of-state visitors primarily visit relatives, but other choices vary, with out-of-state visitors more likely to take advantage of Oklahoma's tourism choices – gaming, dining, sightseeing, and shown in more detail later in the report, history, museums, festivals, and outdoor (camping) options.



From where they come ... to where they go

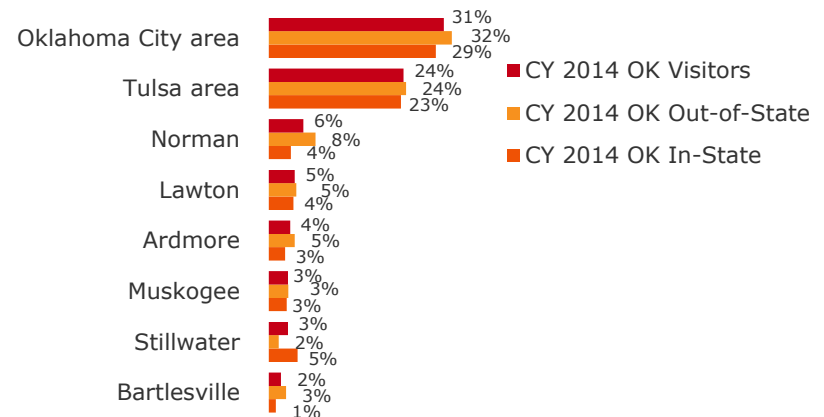
- Oklahoma primarily draws visitors from within its borders and Texas, with a boost from Kansas, Missouri, and Arkansas. Similar to many other destinations, key source markets often border Oklahoma.

From Where (CY 2014) ...

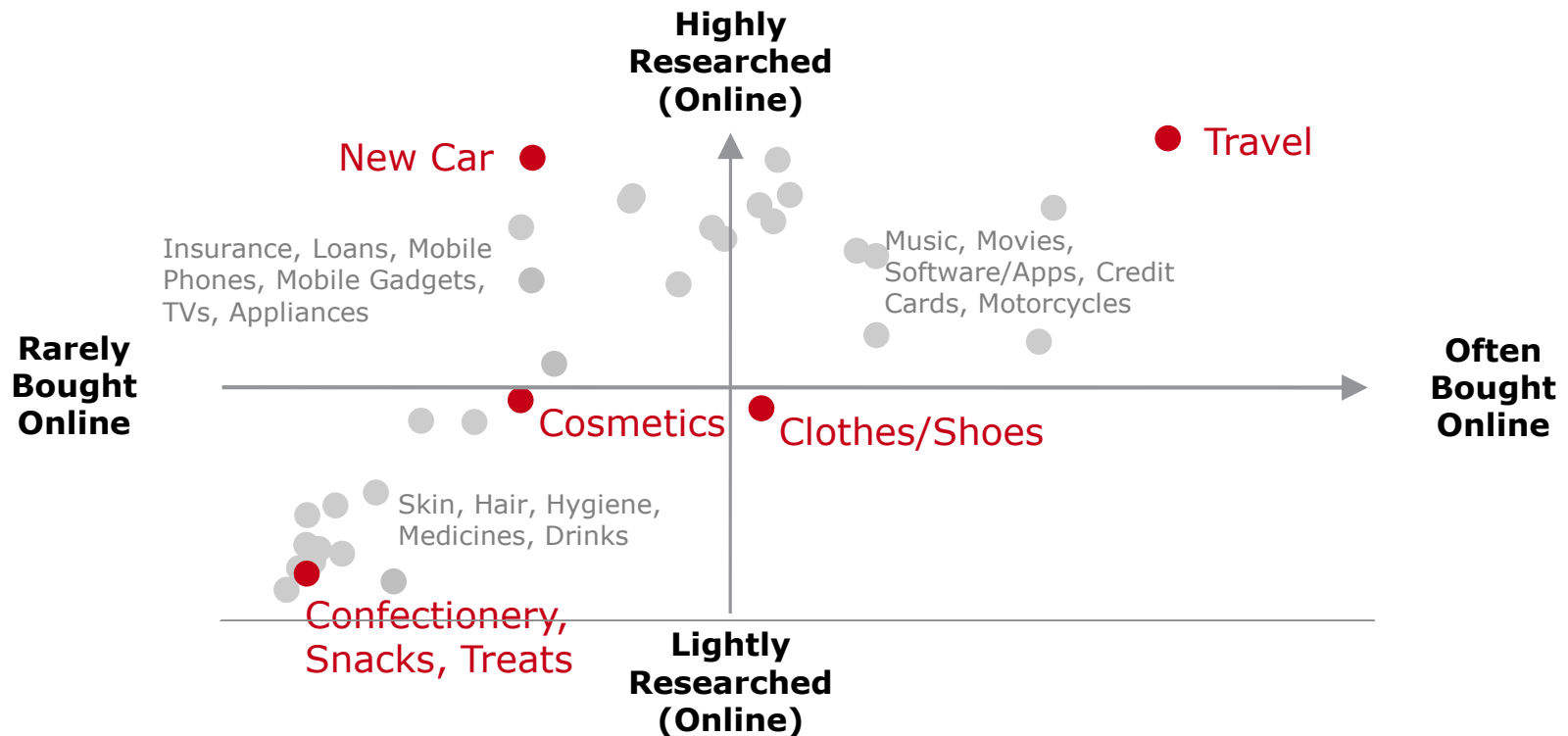


- The largest Oklahoma cities attract the most visitors, regardless of where they live. Few differences appear by in-state or out-of-state residence.

To Where ...



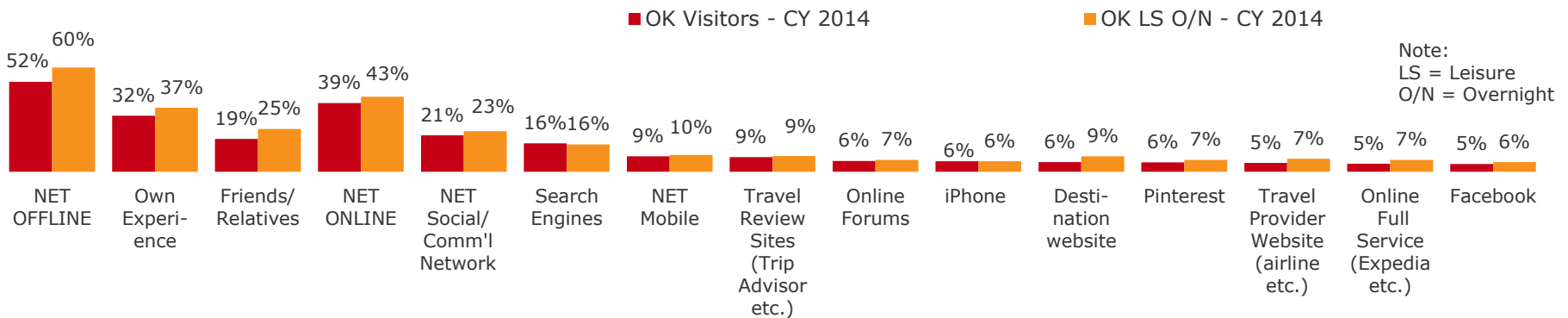
Travel planning and purchases both heavily depend upon online resources, far more than any other product



For planning and booking trips, Oklahoma visitors ...

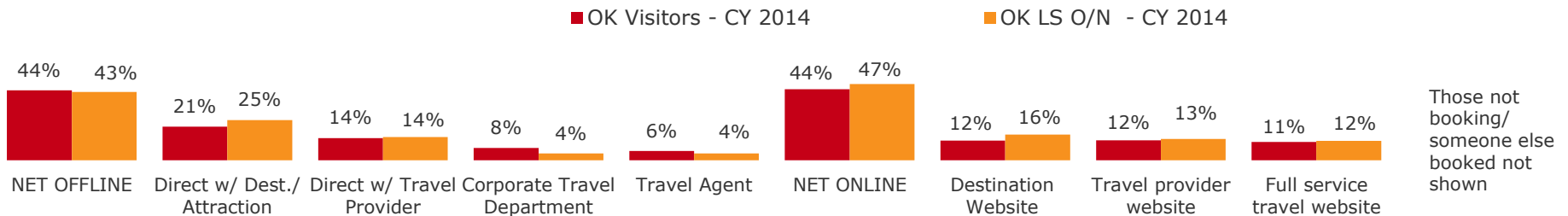
- Most commonly use their own experience or acquire information by word-of-mouth, either directly from friends/relatives or via social/commercial networking.

Planning



- Seem more likely to book directly with a destination, either on- or off-line.

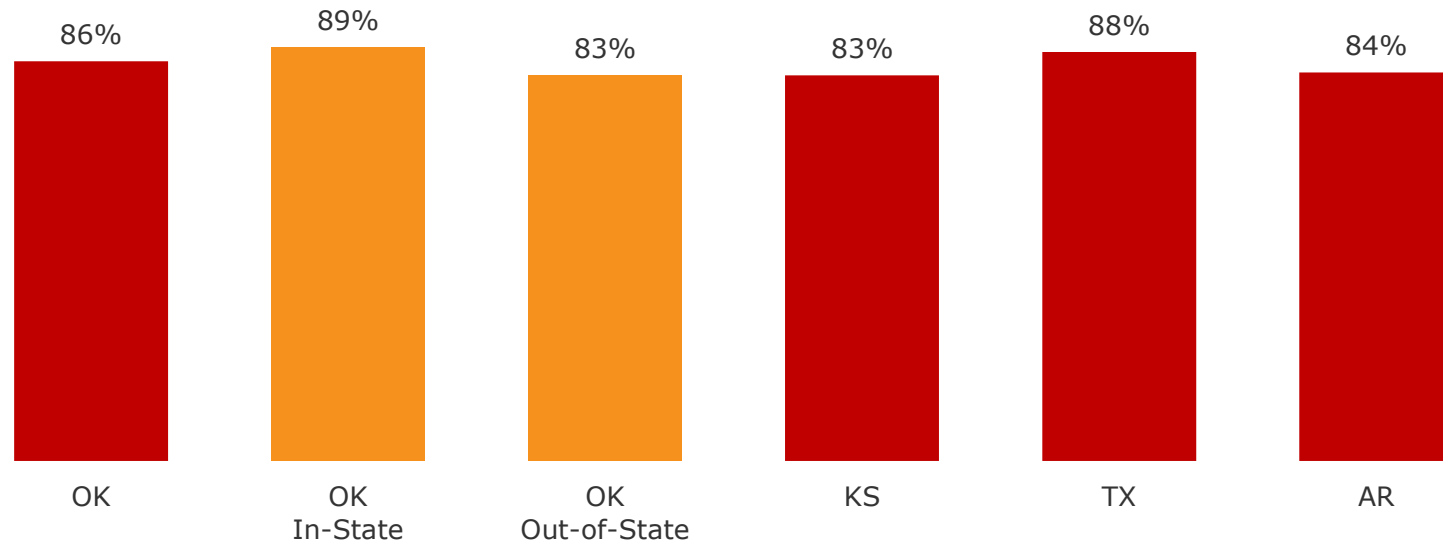
Booking



Oklahoma sends visitors home happy

- Oklahoma satisfies visitors, more so than competitors Kansas or Arkansas, with residents finding greater satisfaction than non-residents.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2014)



Sizing and revenue by activity engaged

- *Family/reunions* boast the largest visitor participation of any niche; however, they spend the least of any group
- The biggest spenders tend to be those taking at least some interest in Oklahoma's outdoor features: *Sightseeing and adventure sports*
- However, those choosing *entertainment/amusement* (particularly gaming and dining) represent the most lucrative segment – relatively high spending and a large share of participants.

| % Active in Each Type | | Average Spend | Average Age | % of Total \$ |
|---------------------------|-----|---------------|-------------|---------------|
| Family Activities/Reunion | 39% | \$304 | 48 | 21% |
| Entertainment/Amusement | 31% | \$562 | 52 | 31 |
| Art & Culture | 13% | \$582 | 45 | 14 |
| Sports and Recreation | 11% | \$423 | 45 | 8 |
| Nature/Outdoor Activities | 10% | \$553 | 43 | 10 |
| Sightseeing | 9% | \$602 | 52 | 10 |
| Parks and Gardens | 4% | \$556 | 55 | 4 |
| Adventure Sports | 2% | \$683 | 41 | 2 |

*Note: Visitors can participate in multiple activities (or none).

*See glossary for activities describing each niche (slide 65)



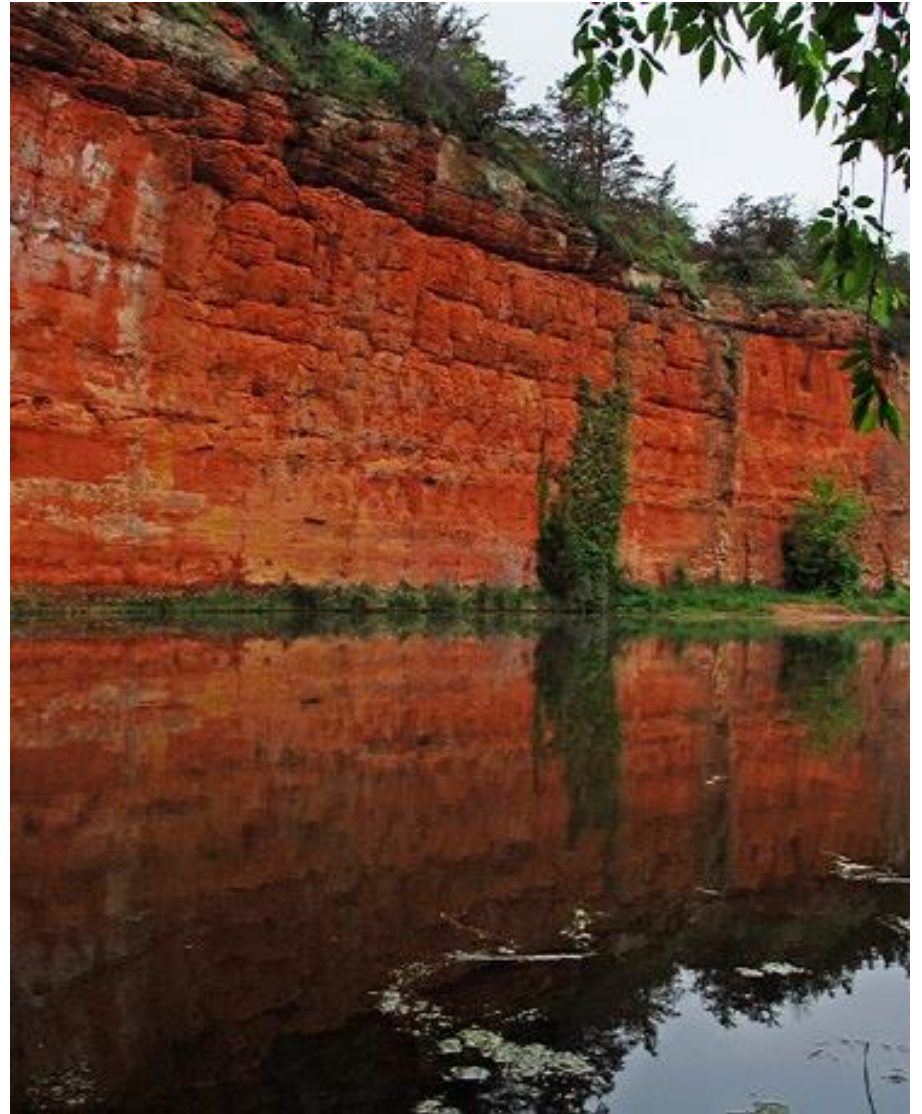
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Detailed Results



4

Share of Visitors



Oklahoma hosts roughly 20 million visitors annually

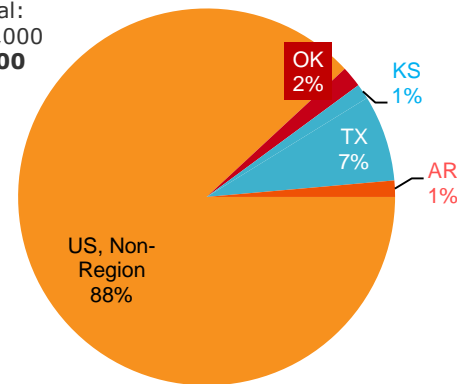
(person-trips; trips = 50+ miles from home (one-way) or spent 1+ nights in CY 2014)

Market Overview:

- Oklahoma visitors make up 2% of total US travel
- Another viewpoint shows "visitors vs. residents." Arriving from all parts of the US, this shows the total of all US visitors to OK (not just in-state residents). Tourism and business travel provide substantial revenue to the state (about 5 visitors per resident).

Visitation – % of Person-Trips: Four States

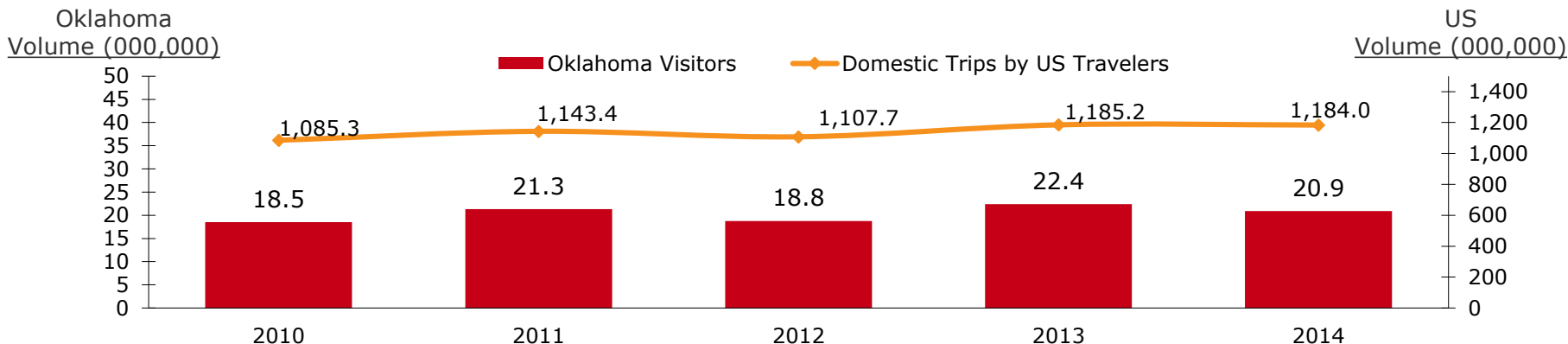
Person-Trips Total:
US = 1,183,981,000
OK = 20,866,000



Travel and Tourism Impact

| State | Population - Census (2014 estimate) | Number of US Visitors to OK in CY 2014 |
|----------|-------------------------------------|--|
| Oklahoma | 3,878,051 | 20,866,000 |

Market History:



Q4a. Please indicate US state(s) visited; Q3b for households (projected)



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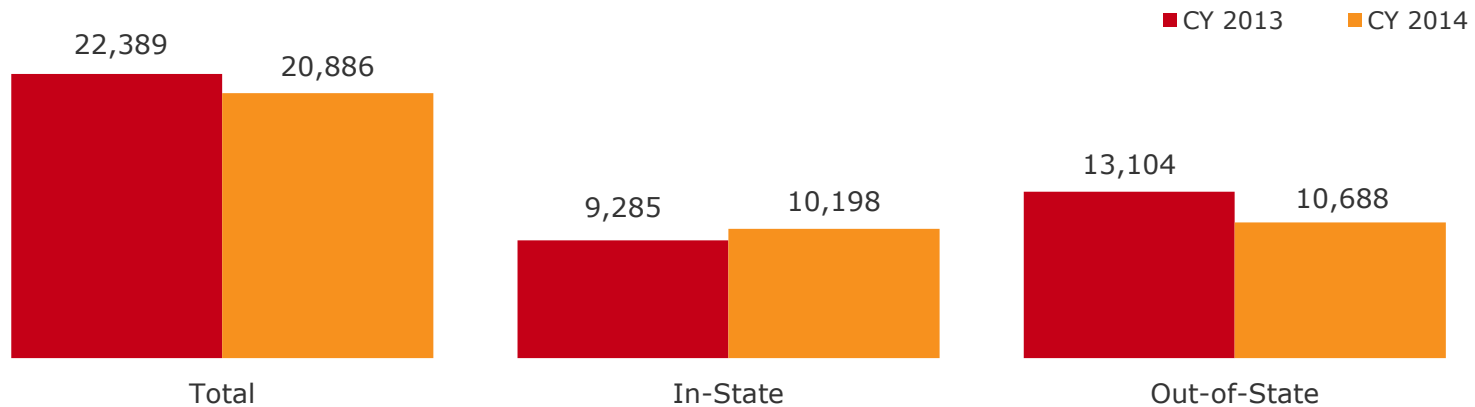


Oklahoma draws many out-of-staters for leisure

(Person-trips; trips = 50+ miles from home (one-way) or spent 1+ nights in CY 2013)

- Although out-of-state visitor volume dips somewhat from last year; they still primarily come for leisure.

Visitation – Person-Trips (000): Oklahoma Visitors



| | Total | | In-State | | Out-of-State | |
|---------------|-------------|-------------|-------------|-------------|--------------|-------------|
| Leisure: | 8,115 (70%) | 7,407 (70%) | 3,381 (63%) | 3,366 (67%) | 4,734 (76%) | 4,041 (73%) |
| Business: | 1,615 (14%) | 1,317 (12%) | 865 (16%) | 607 (12%) | 750 (12%) | 710 (13%) |
| Unclassified: | 1,856 (16%) | 1,865 (18%) | 1,107 (21%) | 1,057 (21%) | 749 (12%) | 808 (15%) |

Q4a. Please indicate US state(s) visited



5

Trip Purpose/Source of Visits/Timing



Visitors usually visit Oklahoma for leisure

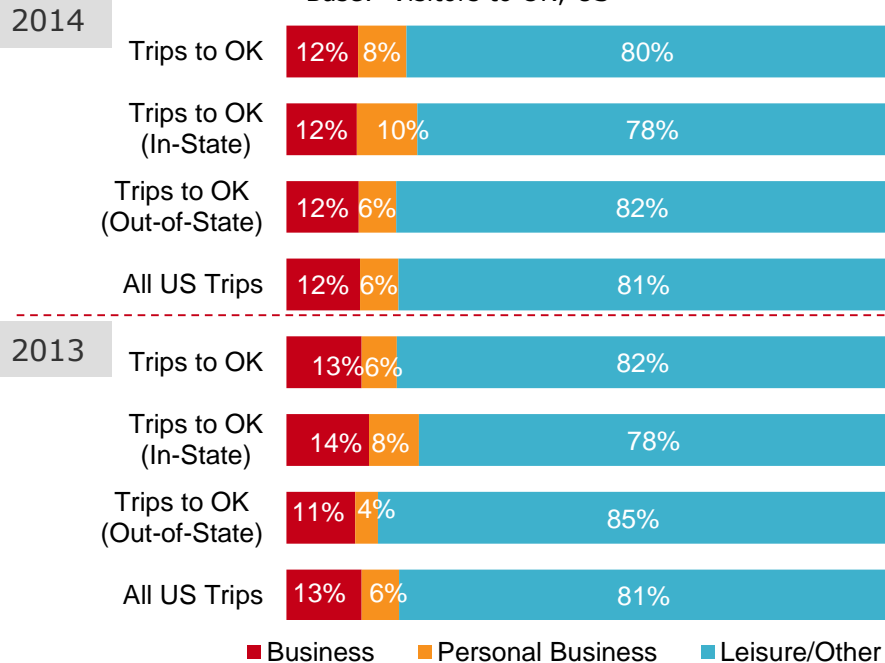
- However, a notable share (12%) comes for business
- Oklahoma residents represent two out of five trips, regardless of purpose.

Trip/Visitor Characteristics

% of Visitors to State

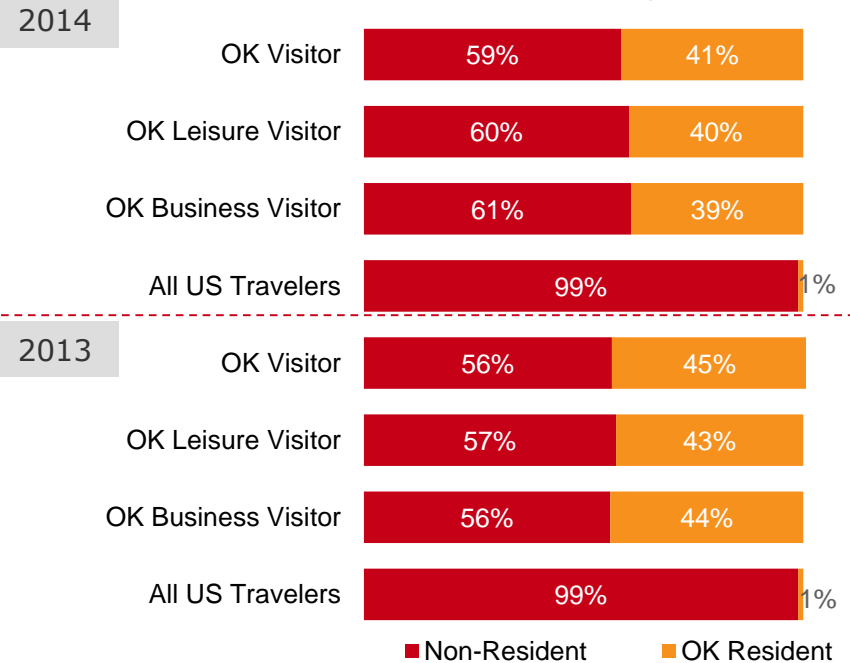
TYPE OF TRIP

Base: Visitors to OK; US



LOCATION OF RESIDENCE

Base: Visitors to OK; US



Q1b. Which of the following was the PRIMARY purpose of trip to . . . (Household Trip Level - demo wtd)

Panel: Residence of visitors (Household Level)

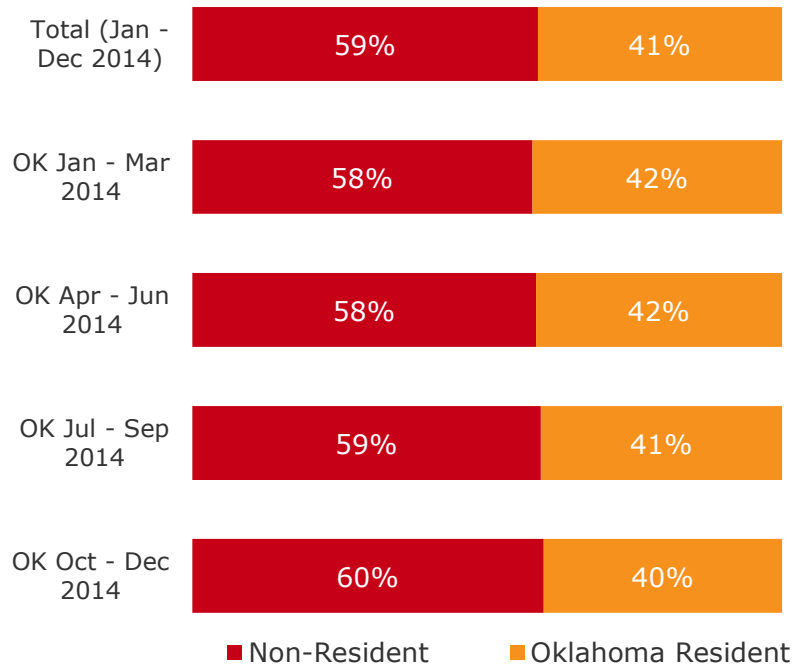


Visitation peaks during Spring and Summer

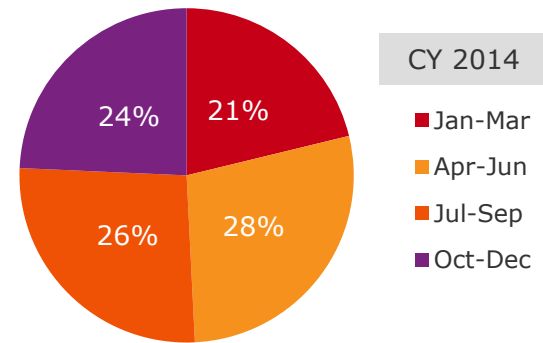
- Oklahoma residents represent the same share of visitors (roughly 40%) throughout the year.

SOURCE of Oklahoma VISITORS by QUARTER

Base: Oklahoma Visitors



Panel: State/DMA residence of those who visited Oklahoma (Household Level)

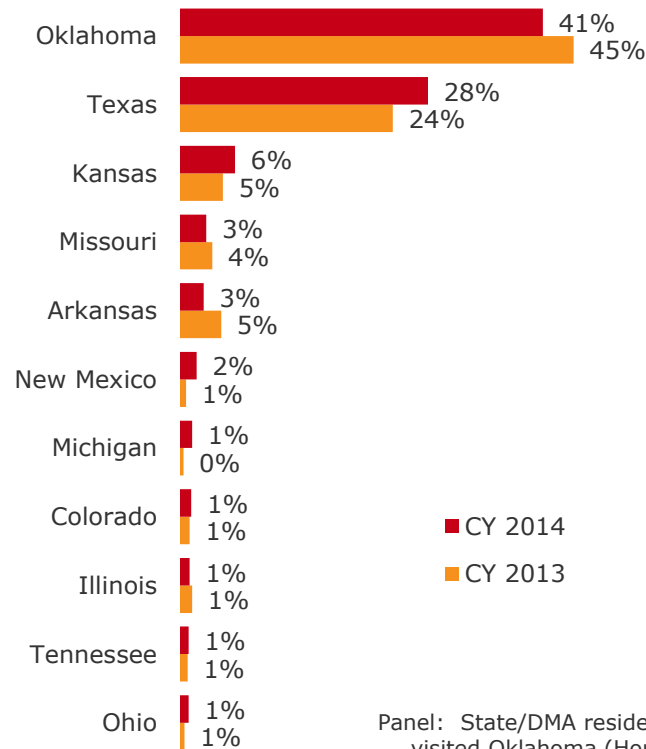


Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)

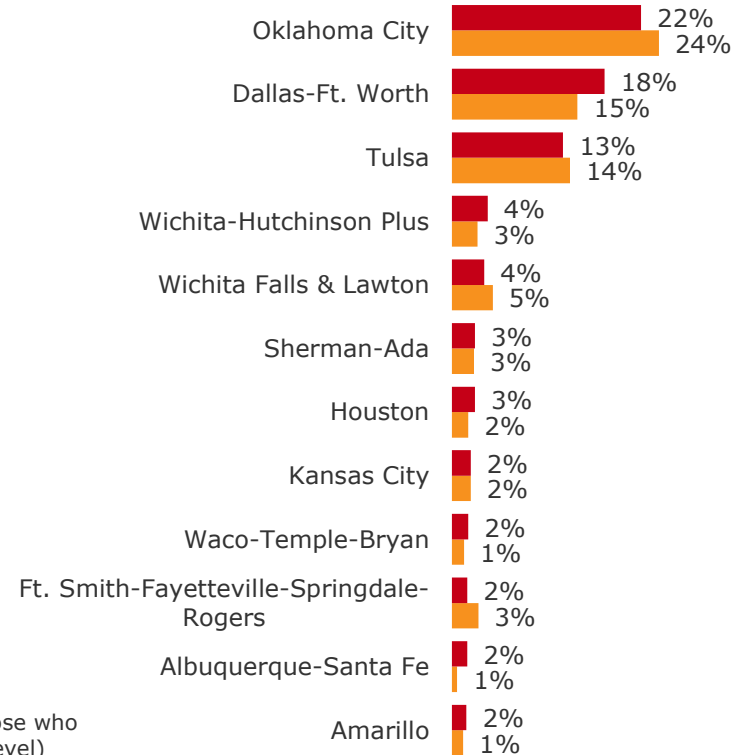
Neighboring Texas dominates Oklahoma's out-of-state visitor source markets

- Plus, over half of the top source DMAs are based in Texas

Source of Visitors: Top States (1%+)
Base: Visited Oklahoma
% of Visitors Residing in . . . (CY 2014)



Source of Visitors: Top DMAs (1.7%+)
Base: Visited Oklahoma
% of Visitors Residing in . . . (CY 2014)



Panel: State/DMA residence of those who visited Oklahoma (Household Level)

6

Planning and Booking



Day-trippers and locals (OK residents) spend less time planning and deciding on an Oklahoma trip

- The shorter time horizon matches expectations since day-trippers and locals have fewer travel considerations (such as lodging, number of meals, transportation logistics)
- With most visitors living in Oklahoma or a neighboring state, the trip decision occurs more spontaneously than for US travelers overall.

| Trip Planning (Time Before Visit) | All US Travelers (All Trips) CY 2014 | OK Visitors Total CY 2013 | OK Visitors Total CY 2014 | OK Visitors Leisure O/N* CY 2014 | OK Visitors Leisure Day Trip CY 2014 | OK In-State Visitors CY 2014 | OK Out-of- State Visitors CY 2014 |
|--------------------------------------|--|---------------------------------|---------------------------------|--|---|---------------------------------------|---|
| Considered | | | | | | | |
| Within Two Weeks | 33% | 37% | 37% | 25% | 53% | 48% | 29% |
| 2 – 4 Weeks | 16 | 16 | 17 | 16 | 17 | 19 | 15 |
| 1 – 3 Months | 19 | 16 | 17 | 18 | 11 | 14 | 18 |
| 3+ Months | 33 | 31 | 30 | 41 | 19 | 18 | 38 |
| Decided | | | | | | | |
| Within Two Weeks | 40% | 45% | 46% | 35% | 61% | 59% | 37% |
| 2 – 4 Weeks | 17 | 16 | 17 | 19 | 16 | 14 | 19 |
| 1 – 3 Months | 18 | 16 | 15 | 17 | 8 | 12 | 17 |
| 3+ Months | 25 | 23 | 23 | 30 | 15 | 15 | 28 |

*O/N = Overnight

Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

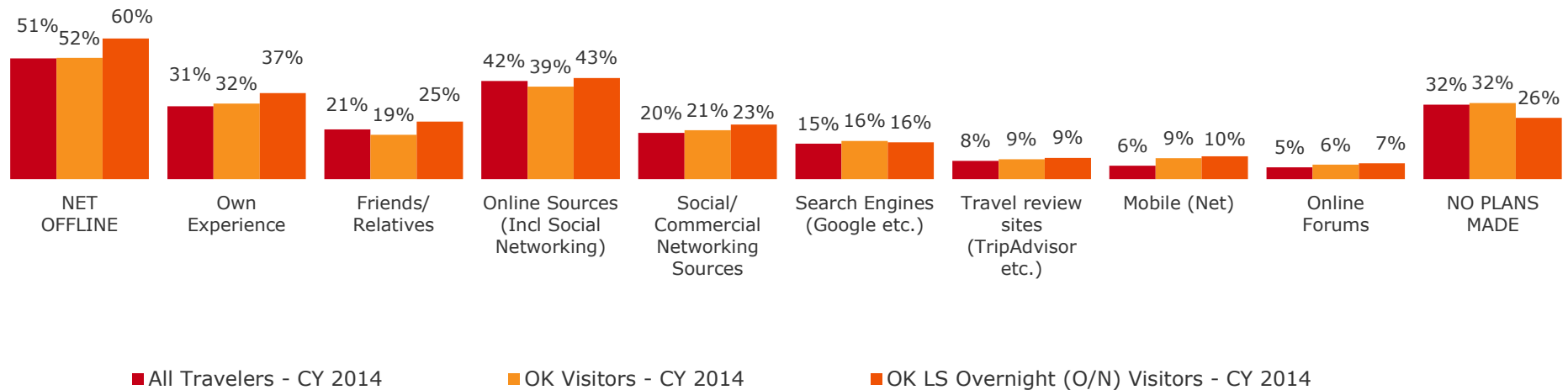


Visitors most commonly use on their own experience to plan an Oklahoma trip

- Visitors also rely on word-of-mouth, either directly or via social/commercial networking.

Information Sources to Plan a Trip

Ranked by All Sources (10%+)



Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Note: Social/Comm'l Network = Facebook, LinkedIn, Twitter, etc.

LS = Leisure
O/N = Overnight



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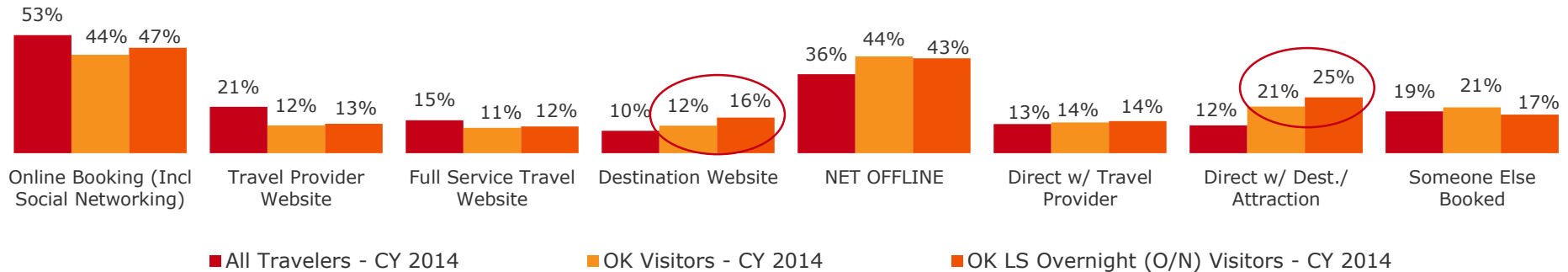
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Oklahoma visitors more likely book directly with a destination, either on- or off-line than other travelers

Method Used to Book Trip Components

Ranked by All Sources (10%+)



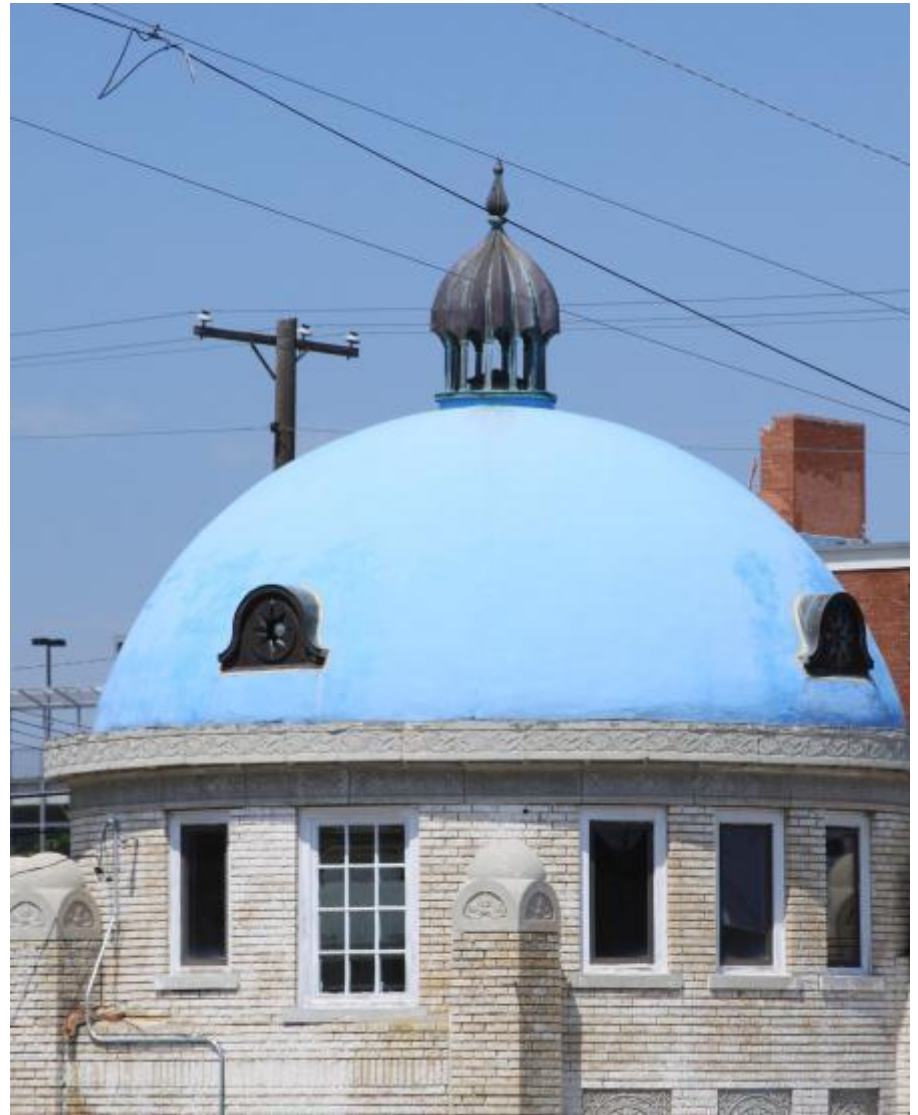
Note: LS = Leisure O/N = Overnight

Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)



7

Trip Characteristics



Visitors drive to Oklahoma to play, most commonly to visit friends/relatives

- Very few fly (fewer than half as many as overall US travelers: 5% vs. 13%)
- Out-of-state visitors spend an extra day in Oklahoma (3.6 vs. 2.4 nights for in-staters).

| Trip Choices (Trip Level) | All US Travelers CY 2014 | OK Visitors Total | OK Visitors Overnight (O/N) Leisure (LS) | OK Visitors Day Trip Leisure (LS) | OK Visitors In-State | OK Visitors Out-of-State |
|-----------------------------|--------------------------|-------------------|--|-----------------------------------|----------------------|--------------------------|
| PRIMARY TRIP PURPOSE | | | | | | |
| NET Leisure | 74% | 72% | 100% | 100% | 70% | 74% |
| Visit Friends/Relatives | 41 | 41 | 59 | 52 | 42 | 40 |
| Entertainment/Sightsee | 11 | 13 | 16 | 21 | 10 | 14 |
| Outdoor Recreation | 7 | 5 | 8 | 6 | 6 | 5 |
| Business | 12 | 12 | - | - | 12 | 12 |
| Personal Business/Other | 13 | 16 | - | - | 19 | 14 |
| PRIMARY MODE | | | | | | |
| % Own Auto/Truck | 76% | 86% | 90% | 90% | 91% | 82% |
| % Air Travel | 13 | 5 | 4 | - | 1 | 9 |

| Lodging (State Level) | All US Travelers CY 2014 | OK Visitors Total | OK Visitors Overnight (O/N) Leisure (LS) | OK Visitors Day Trip Leisure (LS) | OK Visitors In-State | OK Visitors Out-of-State |
|-----------------------|--------------------------|-------------------|--|-----------------------------------|----------------------|--------------------------|
| AVG # NIGHTS (if any) | 3.2 | 3.2 | 3.0 | - | 2.4 | 3.6 |
| Private Home | 1.6 | 1.6 | 1.8 | - | 1.0 | 2.0 |
| Hotel/Motel | 1.1 | 1.1 | 0.9 | - | 0.9 | 1.3 |
| Other | 0.5 | 0.5 | 0.3 | - | 0.5 | 0.3 |

Q1b: Which was the primary purpose of trip? Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)



Of competitors, more TX visitors come for business and fly; however, OK and AR visitors stay longer

| Trip Choices (Trip Level) | All US Travelers CY 2014 | Visit OK | Visit KS | Visit TX | Visit AR |
|-----------------------------|-----------------------------|----------|----------|----------|----------|
| PRIMARY TRIP PURPOSE | | | | | |
| NET Leisure | 74% | 72% | 76% | 69% | 71% |
| Visit Friends/Relatives | 41 | 41 | 54 | 43 | 41 |
| Entertainment/Sightsee | 11 | 13 | 6 | 8 | 11 |
| Outdoor Recreation | 7 | 5 | 6 | 5 | 7 |
| Business | 12 | 12 | 11 | 15 | 11 |
| Personal Business/Other | 13 | 16 | 13 | 16 | 18 |
| PRIMARY MODE | | | | | |
| % Own Auto/Truck | 76% | 86% | 83% | 78% | 85% |
| % Air Travel | 13 | 5 | 8 | 13 | 5 |
| Lodging (State Level) | All US Trips CY 2014 | Visit OK | Visit KS | Visit TX | Visit AR |
| AVG # NIGHTS (if any) | 3.2 | 3.2 | 1.8 | 2.7 | 4.5 |
| Private Home | 1.6 | 1.6 | 0.5 | 0.9 | 2.7 |
| Hotel/Motel | 1.1 | 1.1 | 1.2 | 1.4 | 1.2 |
| Other | 0.5 | 0.5 | 0.1 | 0.4 | 0.6 |

Q1b: Which was the primary purpose of trip? Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)



Visitors often come with just one companion, but many (26%) bring children (rising to a third in summer)

| Trip Characteristics (Trip Level) | All US Travelers CY 2014 | OK Visitors Total | OK Visitors for Busi-ness | OK Visitors for Leisure (LS) | OK Visitors Overnight (O/N) LS | OK Visitors In-State | OK Visitors Out-of-State |
|-----------------------------------|--------------------------|-------------------|---------------------------|------------------------------|--------------------------------|----------------------|--------------------------|
| AVG IN TRAVEL PARTY | 2.7 | 2.8 | 2.3 | 2.9 | 2.7 | 2.7 | 2.9 |
| % Travel in Pairs | 40% | 39% | 26% | 41% | 42% | 33% | 45% |
| % Travel w/ Children | 24 | 26 | 16 | 29 | 28 | 34 | 19 |
| Avg # Kids Inc. 0 | 0.5 | 0.5 | 0.3 | 0.5 | 0.5 | 0.6 | 0.4 |
| Avg # Kids Exc. 0 | 2.0 | 1.8 | 2.1 | 1.8 | 1.8 | 1.7 | 2.1 |

| Trip Characteristics (Trip Level) | All OK Visitors | Q1 Jan – Mar 2014 | Q2 Apr – Jun 2014 | Q3 Jul – Sep 2014 | Q4 Oct – Dec 2014 |
|--------------------------------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| AVERAGE # IN TRAVEL PARTY (Q3a) | 2.8 | 2.5 | 2.9 | 2.9 | 3.0 |
| % Travel in Pairs | 39% | 43% | 41% | 37% | 36% |
| % Traveling with Children | 26 | 28 | 20 | 33 | 24 |
| Avg. # of Children on Trip Inc. Zero | 0.5 | 0.5 | 0.3 | 0.7 | 0.5 |
| Avg. # of Children on Trip Exc. Zero | 1.8 | 1.6 | 1.7 | 2.0 | 2.0 |

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)



Oklahoma and nearby competitors' travel parties look very similar

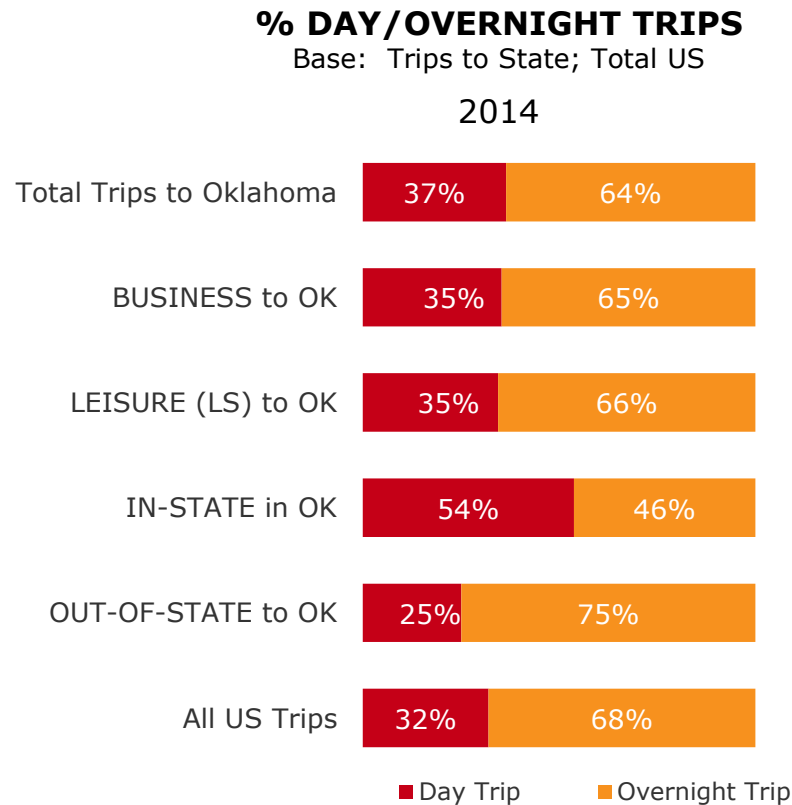
| Trip Characteristics (Trip Level) | All US Travelers CY 2014 | Visit OK | Visit KS | Visit TX | Visit AR |
|-----------------------------------|--------------------------|----------|----------|----------|----------|
| AVERAGE # IN TRAVEL PARTY | 2.7 | 2.8 | 2.6 | 2.6 | 3.1 |
| % Travel in Pairs | 40% | 39% | 36% | 37% | 42% |
| % Traveling with Children | 24 | 26 | 25 | 27 | 27 |
| Avg. # of Children on Trip Inc. 0 | 0.5 | 0.5 | 0.5 | 0.5 | 0.6 |
| Avg. # of Children on Trip Exc. 0 | 2.0 | 1.8 | 2.0 | 2.0 | 2.2 |

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)



Two-thirds of visitors spend the night – somewhat fewer than the US average

- Oklahoma residents take greater advantage of day-trips
- (Note: personal business and other are not classified as either business or leisure trips).

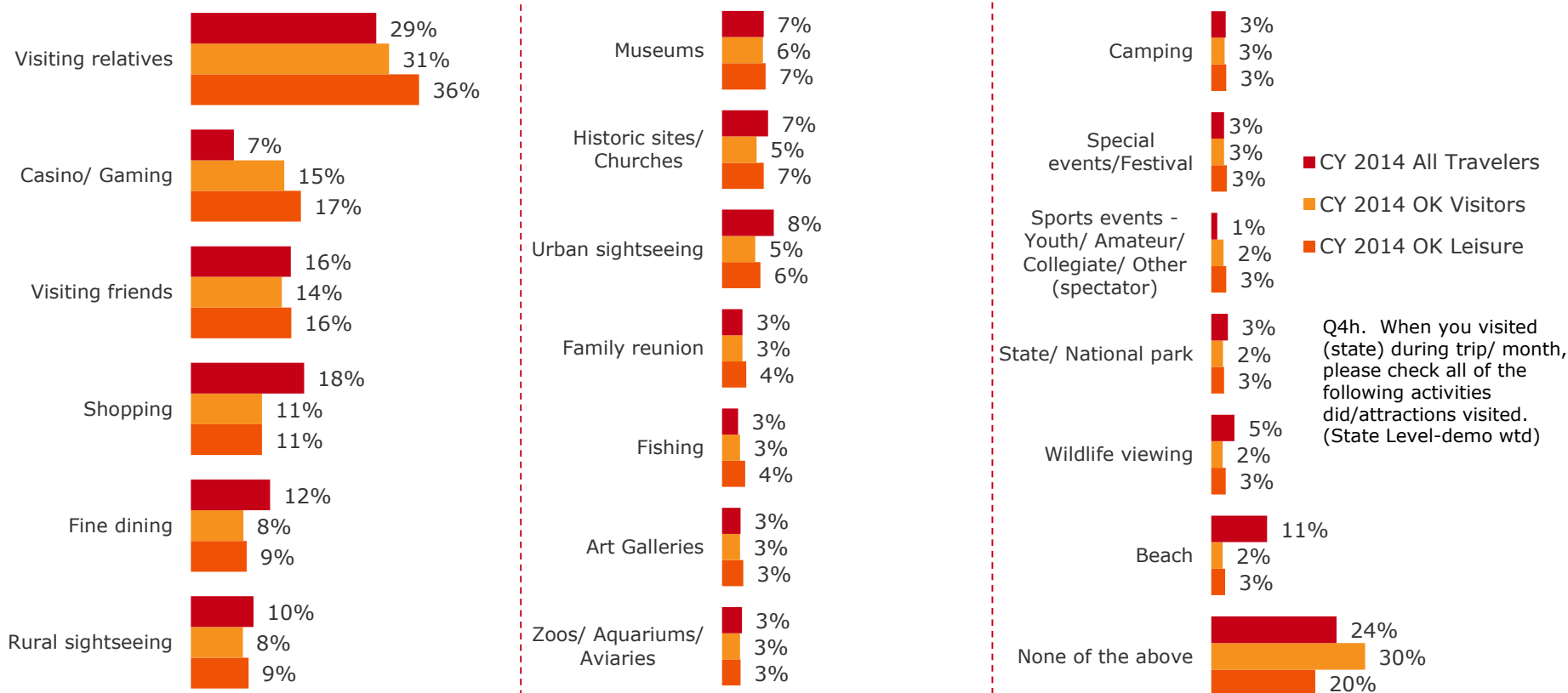


Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

Oklahoma visitors primarily come to visit friends/relatives

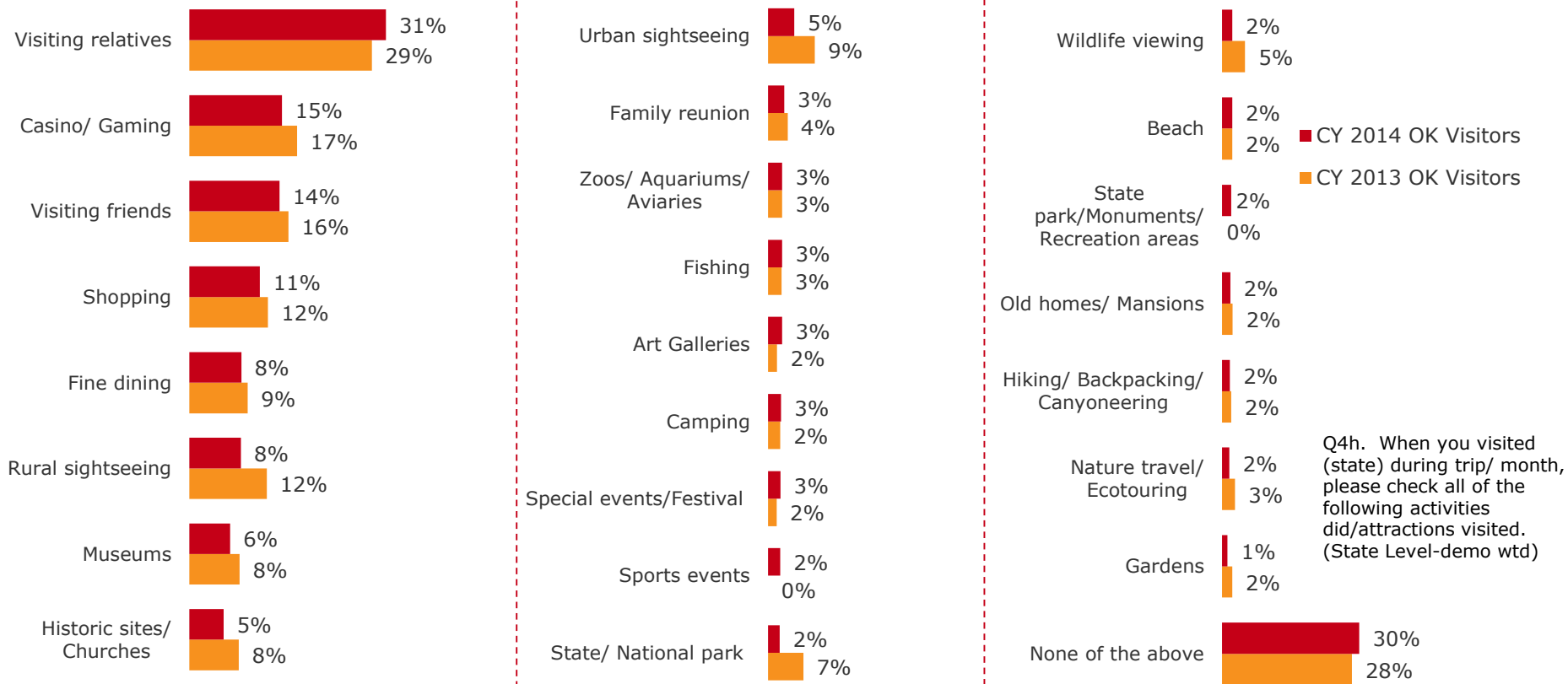
- However, compared to total US travelers, a much larger proportion travels for casinos and gaming while fewer shop, enjoy fine dining, or visit beaches.

CY 2014 % Activities Participated/Attractions
 Ranked by 2014 Oklahoma Visitors (Activities with <3% for Oklahoma not shown)



Oklahoma visitors sightsee a bit less than last year (both rural and urban)

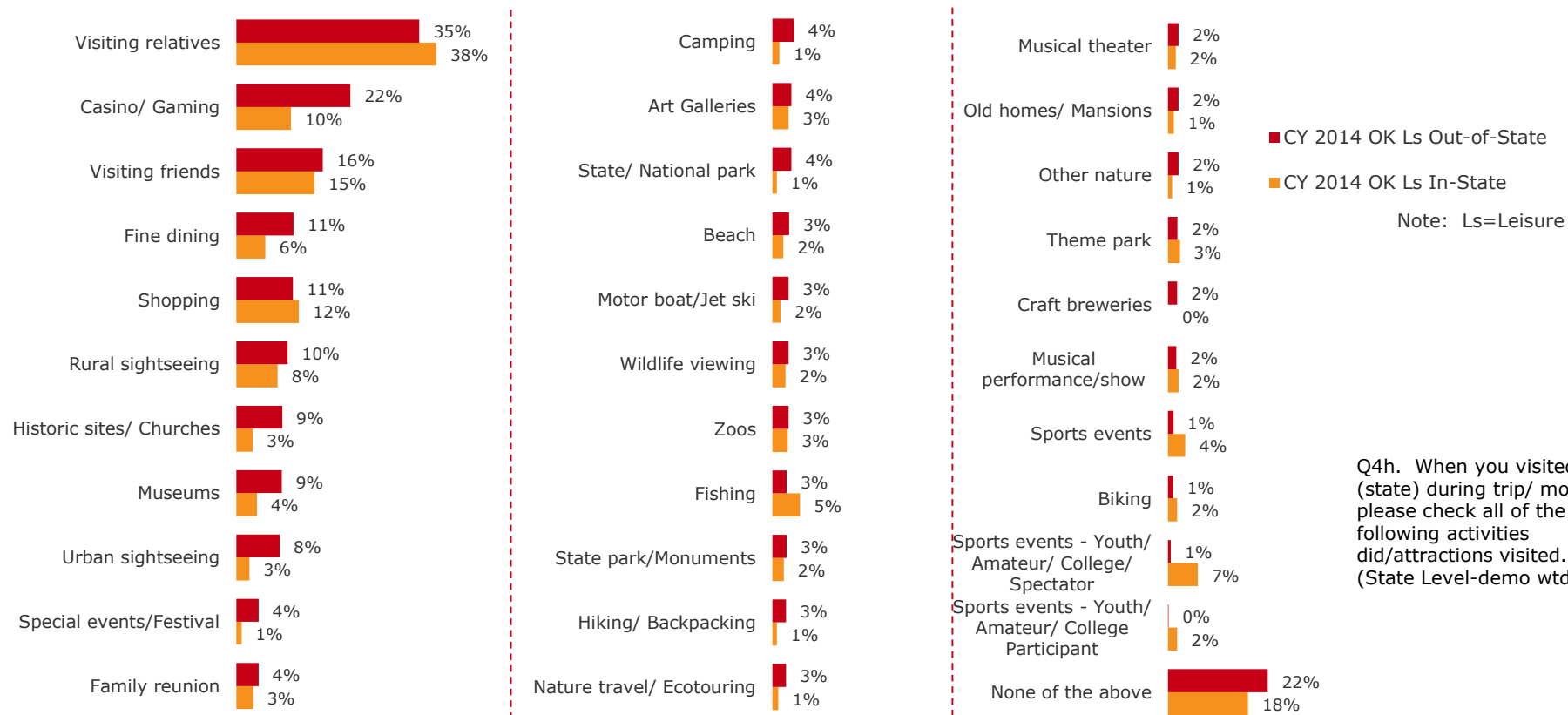
Trend: % Activities Participated/Attractions by Oklahoma Visitors
Ranked by 2014 Total Oklahoma Visitors



Out-of-staters more likely opt for "touristy" choices

- Especially gaming, dining, and sightseeing/historic sites/museums.
- In-staters more often visit relatives and shop.

Activities Participated/Attractions Visited by Leisure Visitors
 % Participated/Visited – Ranked by 2014 Oklahoma Out-of-State Visitors



Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Over half of leisure travelers visit friends/relatives and often stay with them; business travelers stay longer and usually in hotels/motels

| OKLAHOMA VISITORS Trip Choices (Trip Level) | Total OK 2013 | Total OK 2014 | Leisure 2014 | Business 2014 | Day Trip 2014 | Overnight 2014 |
|--|------------------|------------------|-----------------|------------------|------------------|-------------------|
| PRIMARY TRIP PURPOSE | | | | | | |
| NET Leisure/Personal | 73% | 72% | 100% | - | 67% | 74% |
| Visit Friends/Relatives | 38 | 41 | 57 | - | 35 | 44 |
| Entertainment/Sightsee | 13 | 13 | 17 | - | 14 | 12 |
| Outdoor Recreation | 5 | 5 | 7 | - | 4 | 6 |
| Business | 13 | 12 | - | 100 | 9 | 13 |
| Personal Bs/Other | 14 | 16 | - | - | 24 | 13 |
| PRIMARY MODE | | | | | | |
| % Own Auto/Truck* | 81% | 86% | 90% | 64% | 89% | 85% |
| % Air Travel | 7 | 5 | 3 | 19 | - | 7 |
| AVG # IN TRAVEL PARTY | 3.0 | 2.8 | 2.9 | 2.3 | 3.3 | 2.6 |
| % Traveling Solo | 28% | 29% | 23% | 58% | 31% | 28% |
| % Traveling With Children | 21 | 26 | 29 | 16 | 28 | 25 |
| OKLAHOMA VISITORS Lodging (State Level) | | | | | | |
| AVG # NIGHTS (if any) | 2.6 | 3.2 | 3.0 | 3.7 | - | 3.2 |
| Private Home | 1.2 | 1.6 | 1.8 | 0.3 | - | 1.6 |
| Hotel/Motel | 1.1 | 1.1 | 0.9 | 2.8 | - | 1.1 |
| Other | 0.3 | 0.5 | 0.3 | 0.6 | - | 0.5 |

LS=Leisure
O/N = Overnight

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

*Auto/Truck only; does not include camper/RV, bus, train, motorcycle, or other



Not only more “touristy,” out-of-state visitors also stay longer

- About a third of both in-state and out-of-state visitors choose hotels/motels.

| OKLAHOMA VISITORS Trip Choices (Trip Level) | Total OK 2013 | Total OK 2014 | In-State Visitors 2014 | Out-of-State Visitors 2014 |
|--|------------------|------------------|---------------------------|-------------------------------|
| PRIMARY TRIP PURPOSE | | | | |
| NET Leisure/Personal | 73% | 72% | 70% | 74% |
| Visit Friends/Relatives | 38 | 41 | 42 | 40 |
| Entertainment/Sightsee | 13 | 13 | 10 | 14 |
| Outdoor Recreation | 5 | 5 | 6 | 5 |
| Business | 13 | 12 | 12 | 12 |
| Personal Bs/Other | 14 | 16 | 19 | 14 |
| PRIMARY MODE | | | | |
| % Own Auto/Truck* | 81% | 86% | 91% | 82% |
| % Air Travel | 7 | 5 | 1 | 9 |
| AVG # IN TRAVEL PARTY | 3.0 | 2.8 | 2.7 | 2.9 |
| % Traveling Solo | 28% | 29% | 32% | 25% |
| % Traveling With Children | 21 | 26 | 34 | 19 |
| OKLAHOMA VISITORS Lodging (State Level) | | | | |
| AVG # NIGHTS (if any) | 2.6 | 3.2 | 2.4 | 3.6 |
| Private Home | 1.2 | 1.6 | 1.0 | 2.0 |
| Hotel/Motel | 1.1 | 1.1 | 0.9 | 1.3 |
| Other | 0.3 | 0.5 | 0.5 | 0.3 |

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+.
(Trip Level – demo wtd)

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

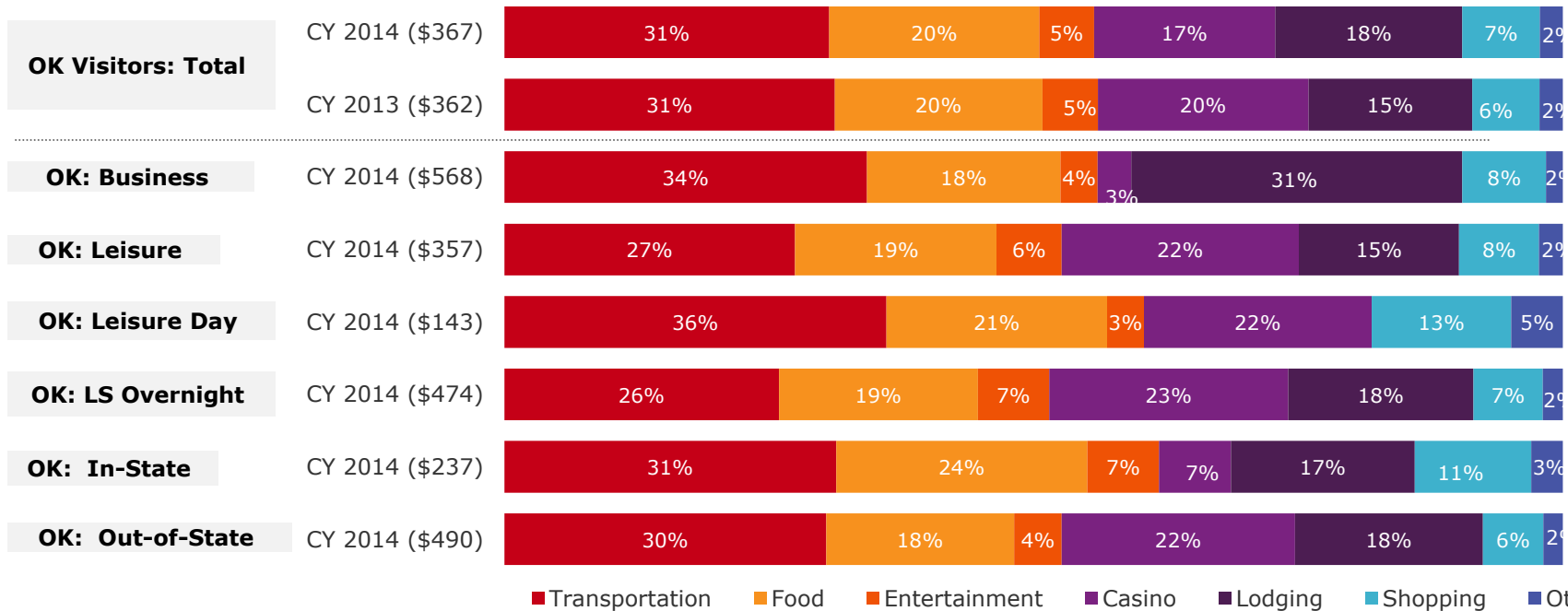
*Auto/Truck only; does not include camper/RV, bus, train, motorcycle, or other



Out-of-staters and business travelers spend the most

- But, choices differ: Out-of-staters spend more on casinos; business travelers buy accommodations
- Total spending slightly exceeds last year.

Average Spending in Oklahoma by Trip Type
Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

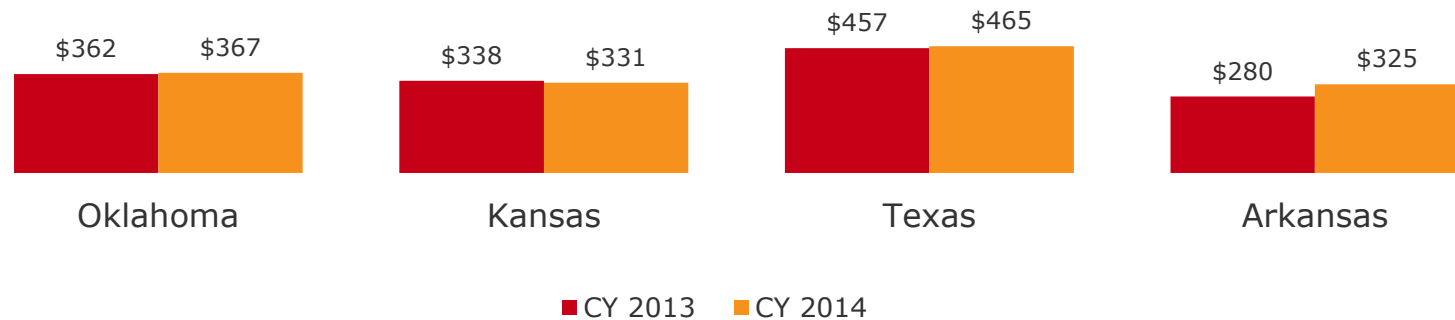
Q4g. Please indicate the total dollar amount spent by your travel party (all) in Oklahoma for . . . (State Level-demo wtd)



Oklahoma visitors spend slightly more than those going to Kansas or Arkansas

- With more urban activities available, visitors spend more in Texas than in competing destinations.

Average Spending in State, CY 2014
Total Spending by Travel Party (Total Spending, including 0)



Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd)
(Includes those not specifying leisure vs. business trips)

8

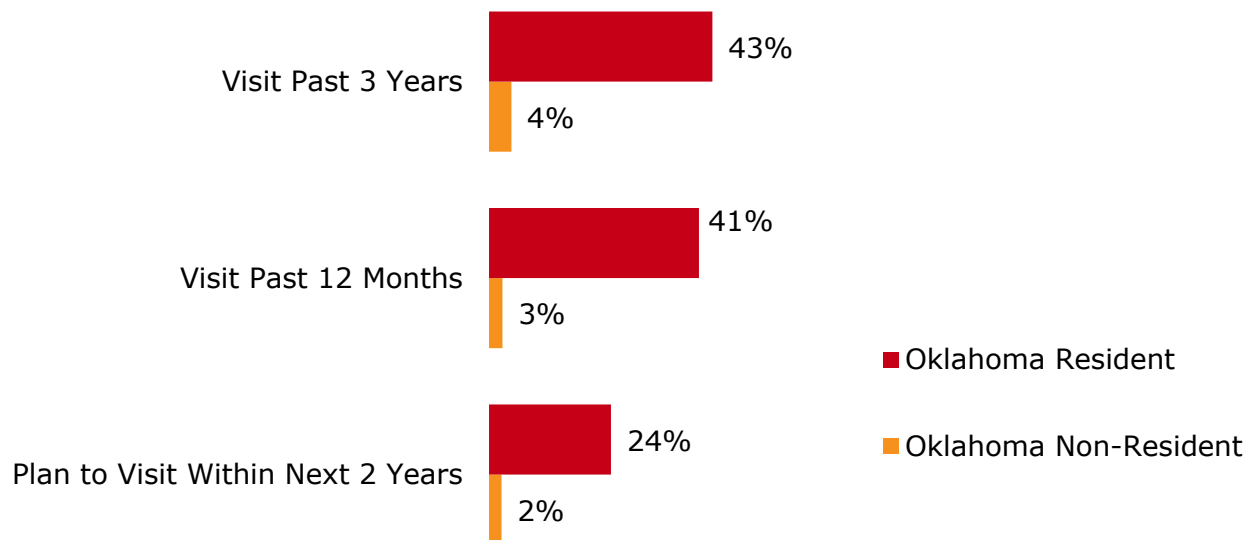
Competitive Environment



Oklahoma draws a large share of visitors from residents

- Nearly half of Oklahoma resident travelers took an in-state trip within the past three years and a quarter of traveling residents place Oklahoma on their near-term future itinerary.

Visitation Patterns for Oklahoma – Household Level, All Travelers



Q7a: Please indicate US states visited for leisure in past three years.

Q7b: Please indicate states visited within the past 12 months.

Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Oklahoma City and Tulsa lead in share of visitors

- Residents and non-residents of Oklahoma choose very similar destinations.

Top Oklahoma Destinations - TOTAL

% Oklahoma Visitors Selecting Area (ranked by CY 2014)

| All Oklahoma Visitors | CY 2013 | CY 2014 | Oklahoma Residents | CY 2013 | CY 2014 | Non-Oklahoma Residents | CY 2013 | CY 2014 |
|-----------------------|---------|---------|--------------------|---------|---------|------------------------|---------|---------|
| Oklahoma City area | 29% | 31% | Oklahoma City area | 32% | 29% | Oklahoma City area | 27% | 32% |
| Tulsa area | 22 | 24 | Tulsa area | 22 | 23 | Tulsa area | 22 | 24 |
| Norman | 7 | 6 | Norman | 9 | 4 | Norman | 6 | 8 |
| Lawton | 4 | 5 | Stillwater | 6 | 5 | Lawton | 4 | 5 |
| Ardmore | 3 | 4 | Muskogee | 4 | 3 | Ardmore | 3 | 5 |
| Stillwater | 4 | 3 | Lawton | 3 | 4 | Muskogee | 3 | 3 |
| Muskogee | 3 | 3 | Ardmore | 2 | 3 | Stillwater | 2 | 2 |
| Bartlesville | 2 | 2 | Bartlesville | 2 | 1 | Bartlesville | 2 | 3 |

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)



Each state has a key city or two that attract the most visitors

Top Destinations Within State

% Visitors Selecting Area (Each State Ranked)

| OK Visitors | CY 2014 | KS Visitors | CY 2014 | TX Visitors | CY 2014 | AR Visitors | CY 2014 |
|---------------|---------|------------------|---------|--------------------|---------|----------------|---------|
| Oklahoma City | 31% | Kansas City Area | 27% | Dallas area | 19% | Little Rock | 30% |
| Tulsa area | 24 | Wichita | 21 | Houston | 16 | Fayetteville | 12 |
| Norman | 6 | Topeka | 11 | Austin | 13 | Hot Springs | 11 |
| Lawton | 5 | Manhattan | 8 | San Antonio | 12 | Fort Smith | 9 |
| Ardmore | 4 | Salina | 7 | Fort Worth area TX | 8 | Eureka Springs | 8 |
| Stillwater | 3 | Lawrence | 5 | Waco TX | 4 | Texarkana | 6 |
| Muskogee | 3 | Hutchinson | 4 | Corpus Christi TX | 4 | Pine Bluff | 2 |
| Bartlesville | 2 | Dodge City | 3 | Galveston TX | 4 | | |
| | | Emporia | 3 | Lubbock TX | 3 | | |

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)



Proximity defines competition

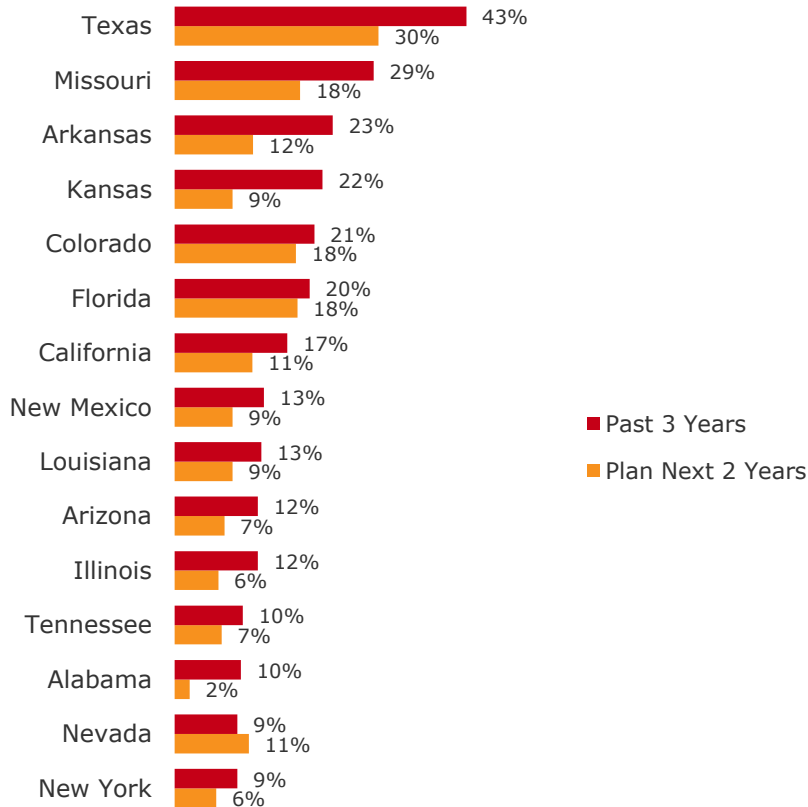
- The top five competitive states border Oklahoma
- Texas takes the top spot for past visits, future intent, and for three of the top four competitive cities.

Other Areas Visited by Oklahoma Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

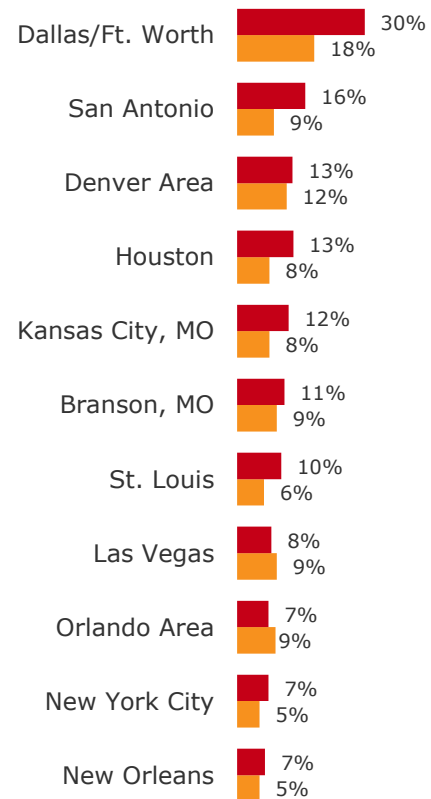
Top States

Base: Visited Oklahoma (Household Level)



Top Cities

Base: Visited Oklahoma (Household Level)



Q7a: Please indicate US states visited for leisure in past three years.

Q7c: US states plan to visit next two years. (Household Level)

Q8a: US cities visited past three years.

Q8c: US cities plan to visit next two years. (Household Level)

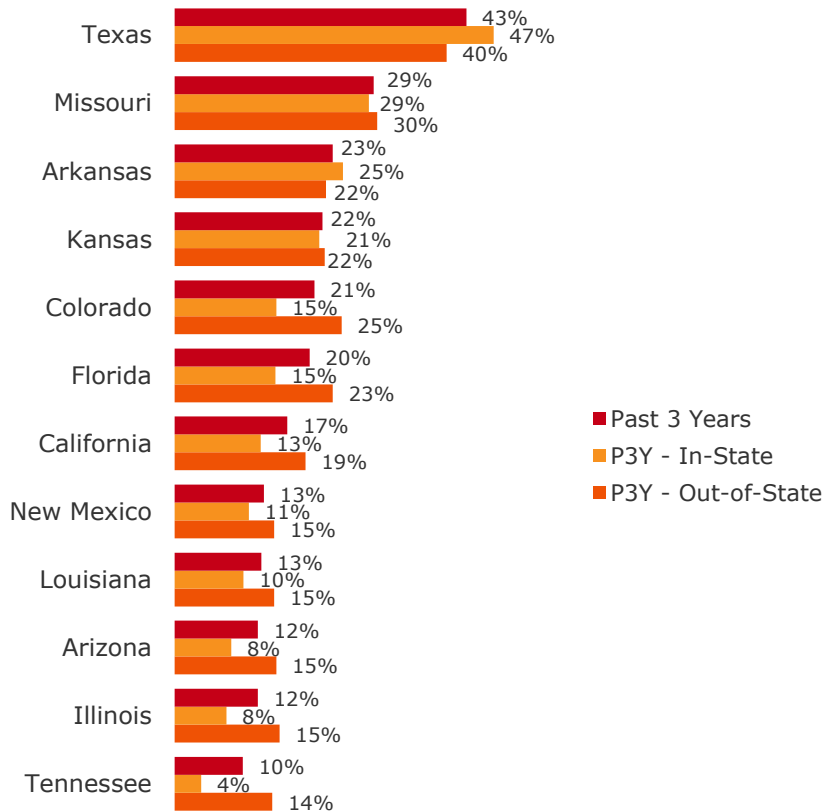
Out-of-staters visit a broader variety of destinations

- Excepting Texas and Arkansas, out-of-state visitors more likely visit every other listed state than in-state travelers.

Other Areas Visited by Oklahoma Visitors in Past 3 Years (Key Competitors)
Past Three Years (Ranking) Total, In-State, Out-of-State

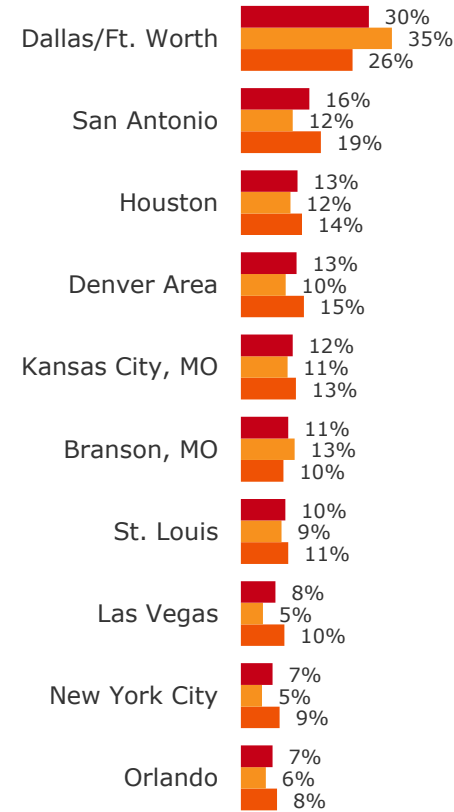
Top States

Base: Visited Oklahoma (Household Level)



Top Cities

Base: Visited Oklahoma (Household Level)



Q7a: Please indicate US states visited for leisure in past three years.

Q8a: US cities visited past three years.



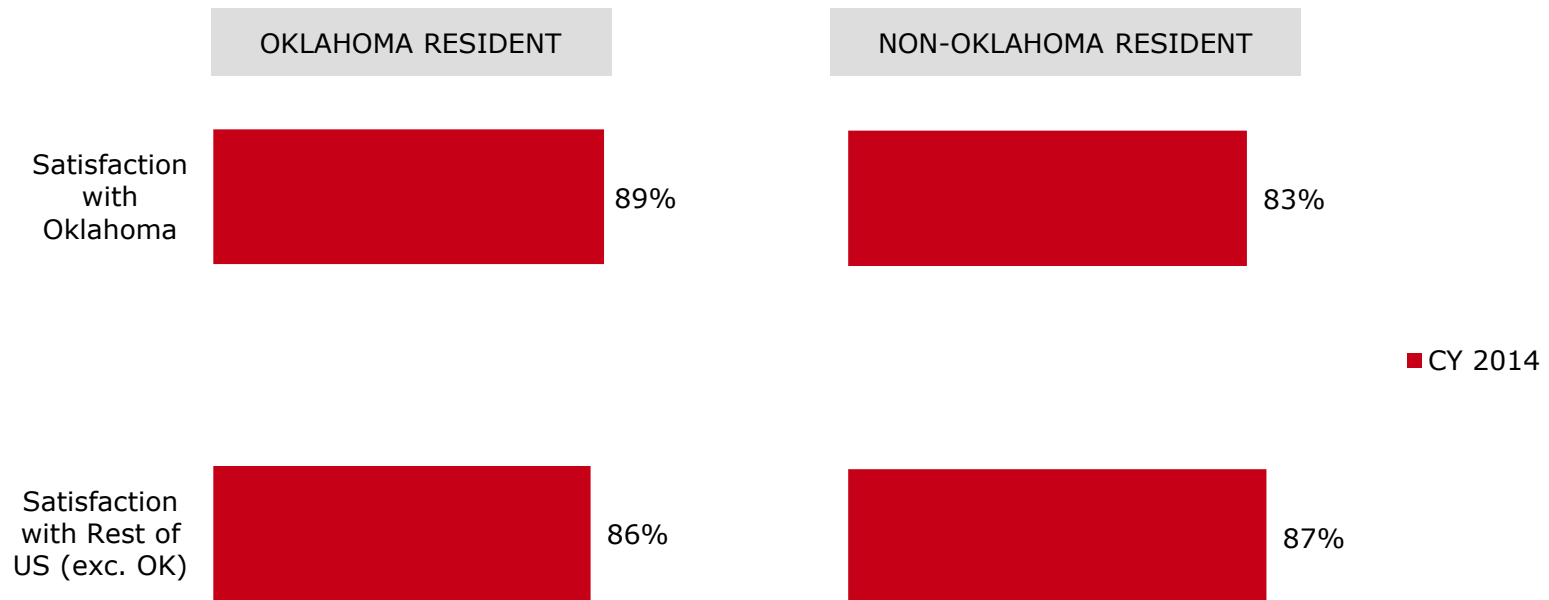
9

Satisfaction



Although non-Oklahomans usually go home satisfied, OK residents more highly praise their home state

Extremely/Very Satisfied With Trip to State or Rest of US

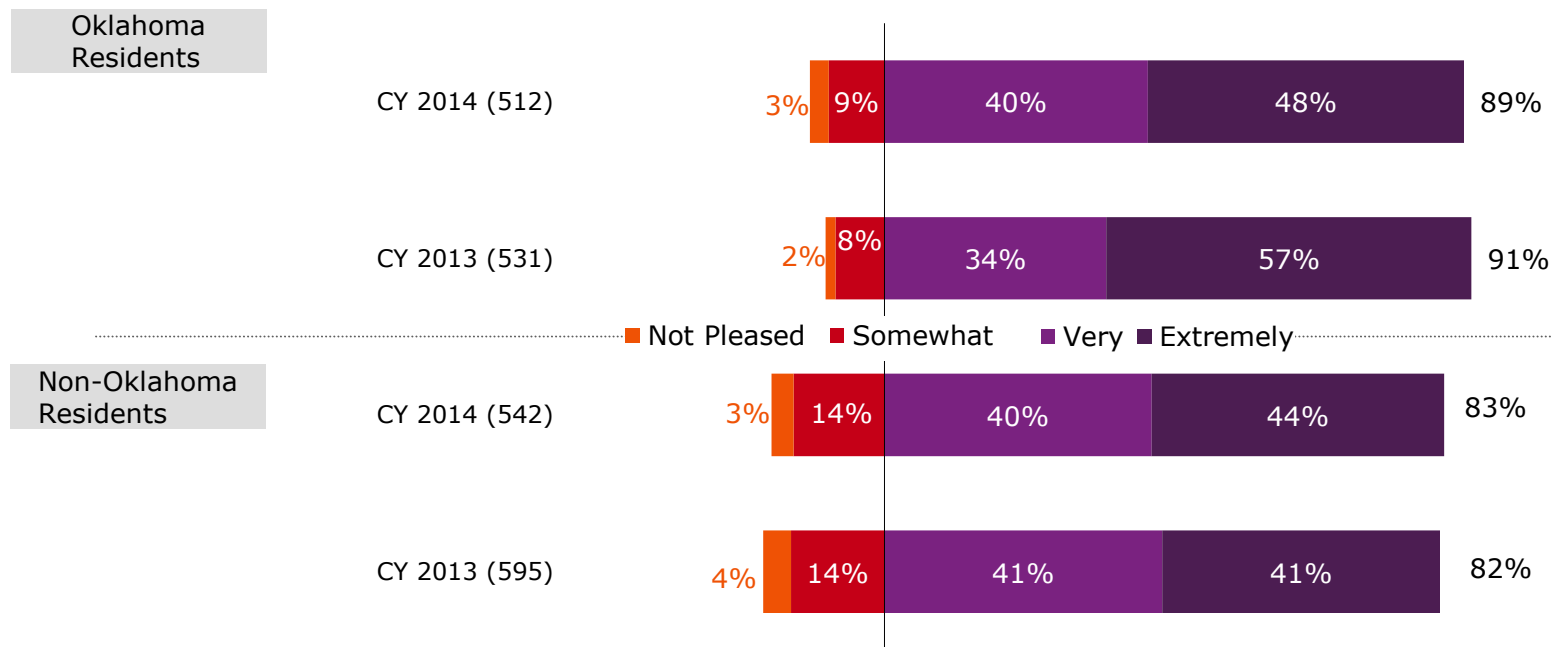


Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

Overall satisfaction with Oklahoma remains similar to the prior year

Satisfaction with Oklahoma Visit

By Group (Base)



*Note: Not pleased includes *Not At All* and *Not Very Pleased*

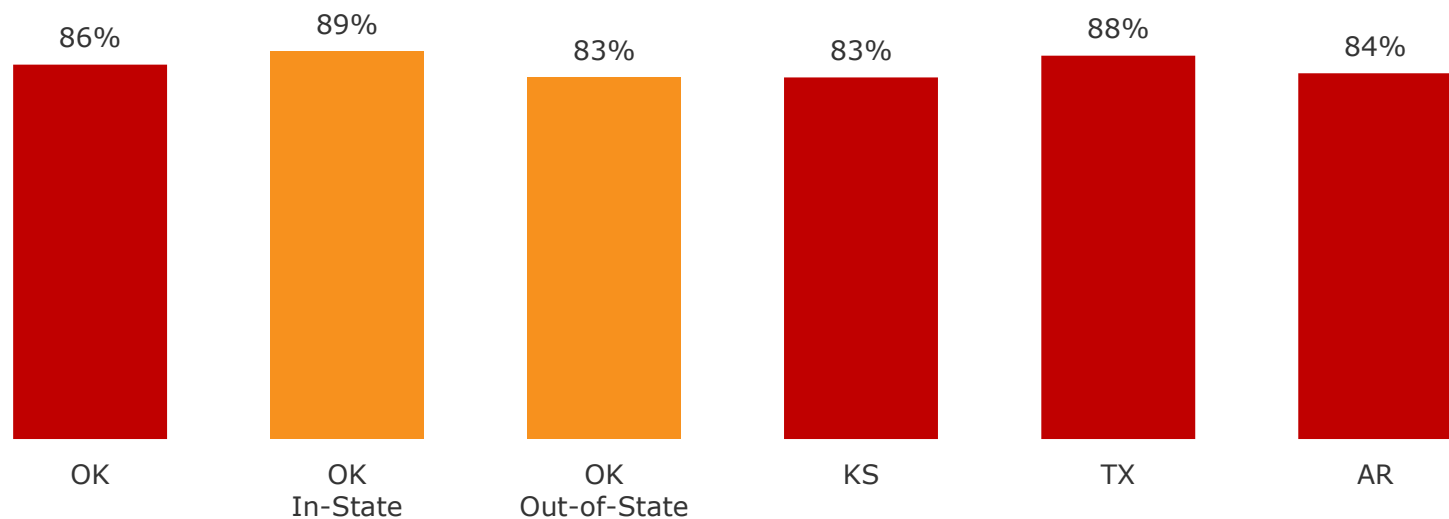
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Oklahoma. (State Level-demo wtd.)



Oklahoma satisfies visitors better than Kansas or Arkansas

- However, Texas visitors are the most satisfied among visitors to these four states
- In-state visitors praise Oklahoma above those coming from out-of-state.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2014)



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with ... (State Level-demo wtd.)



10

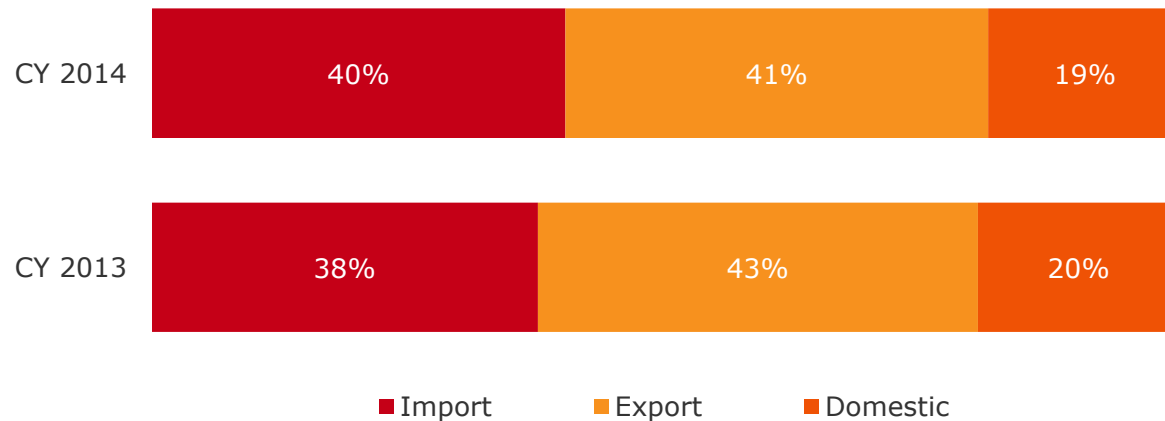
Export/Import



Oklahoma's imports virtually equals exports

"Balance of Trade":

- However, adding Oklahoma residents' spending inside the state ("domestic" spending) lifts total tourism dollars spent in Oklahoma above the total spent by Oklahoma residents elsewhere.



Import represents \$ leaving OK

Export represents \$ coming into OK

Domestic represents \$ staying in OK

Note: Spending that occurs outside the state by non-residents is not included in the chart.

11

Digital Life



Digital lifestyles



INFLUENCERS

The Internet is an integral part of my life. I'm young and a big mobile Internet user and generally access everywhere, all of the time. I'm a blogger, and a passionate social networker. I'm also a big online shopper, even via my mobile. I want to make sure as many people as possible hear my online voice.



COMMUNICATORS

I just love talking and expressing myself, whether that's face to face, on a fixed line, mobile or on social networking sites, instant messaging or just emailing people. I really want to express myself in the online world in the way that I can't in the offline one. I tend to be a smart phone user and I'm connecting online from my mobile, at home, at work or at college.



KNOWLEDGE-SEEKERS

I use the Internet to gain knowledge, information and to educate myself about the world. I'm not a big user of social networks but I do want to hear from like-minded people especially to help me make purchase decisions. I'm very interested in the latest thing.



NETWORKERS

The Internet is important for me to establish and maintain relationships. I have a busy life whether it's my profession or managing the home. I use things like social networking to keep in touch with people I wouldn't have time to otherwise. I'm a big home Internet home user and I'm very open to talking to brands and looking for promotions. That said I'm not really the kind of person to voice my opinions online.



ASPIRERS

I'm looking to create a personal space online. I'm very new to the Internet and I'm accessing via mobile and Internet cafes but mostly from home. I'm not doing a great deal at the moment online but I'm desperate to do more of everything, especially from a mobile device.



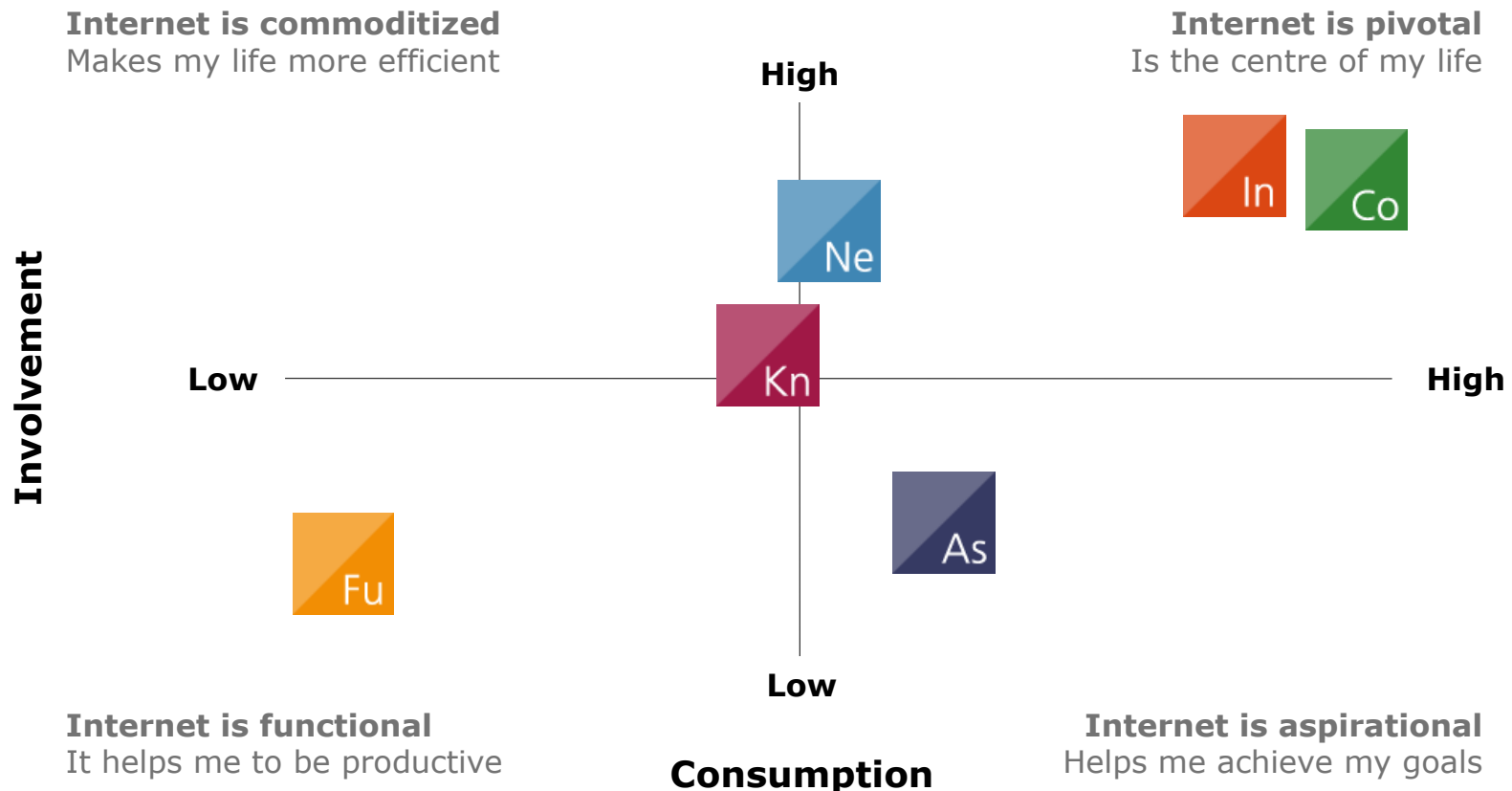
FUNCTIONALS

The Internet is a functional tool, I don't want to express myself online. I like emailing, checking the news, sport & weather but also online shopping. I'm really not interested in running my social life online and I am worried about data privacy and security. I am older and have been using the Internet for a long time.

Source: US Digital Life General Report

Digital lifestyles: consumption/involvement

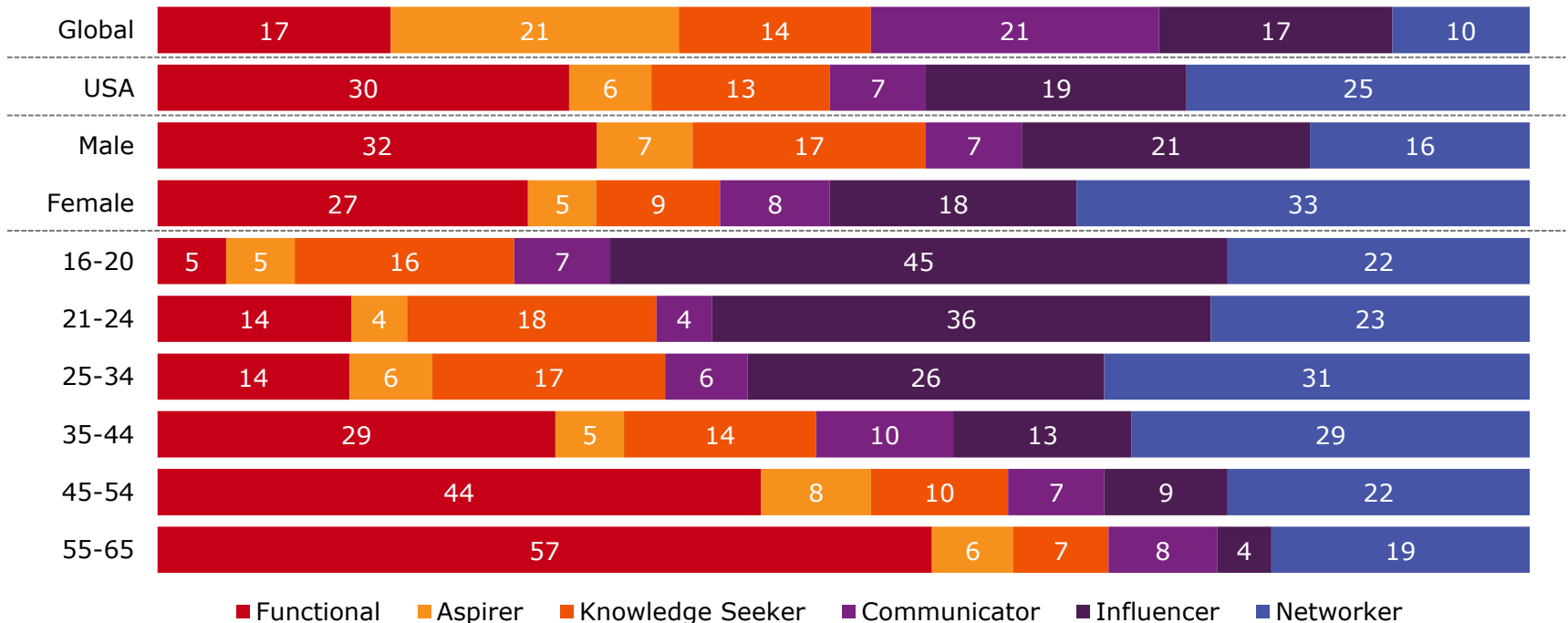
- Digital media plays a vital role in the lifestyle of Influencers and Communicators; a good disseminator of their views.



Source: US Digital Life General Report

Digital lifestyles: Functional use dominates after 40

- Compared to the rest of the world, the US has a large base of Functionals, especially in older markets; the youth has a larger share of Influencers.



Source: US Digital Life General Report



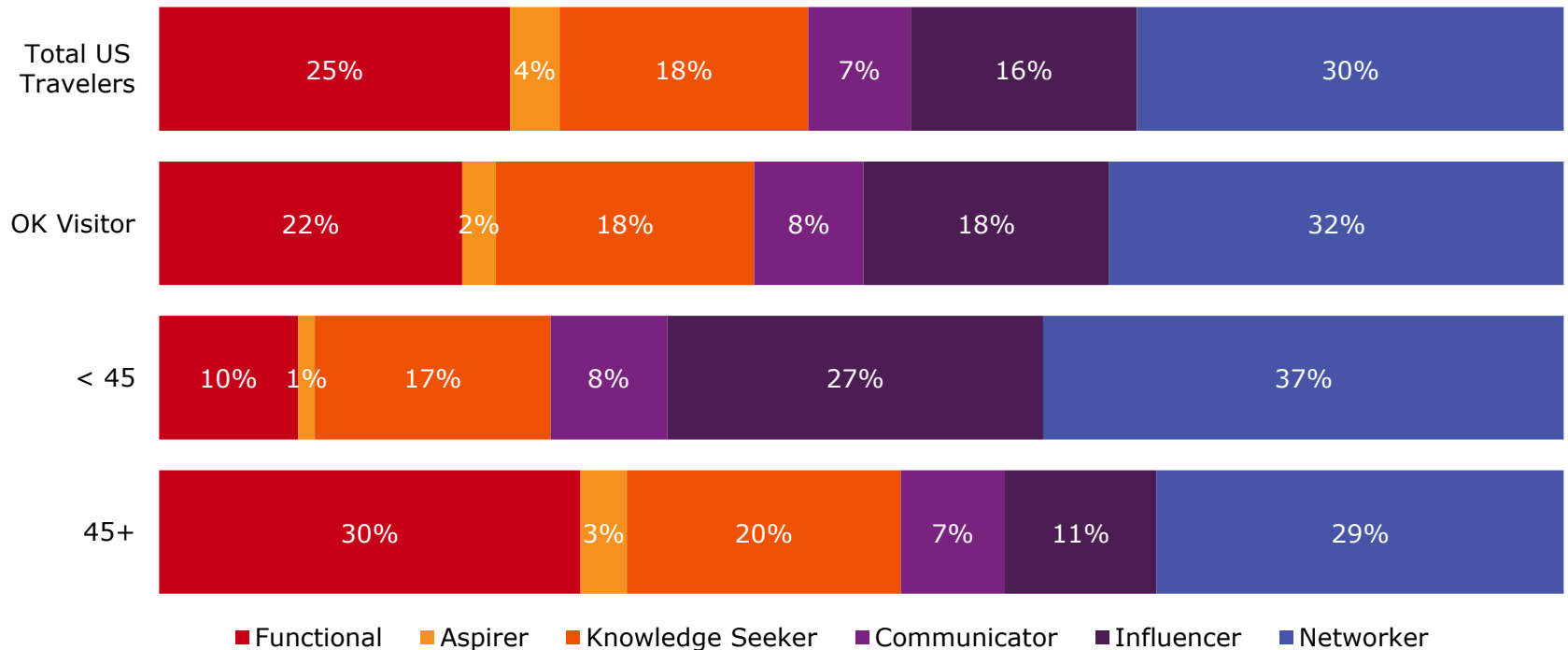
Calendar Year 2014 – Oklahoma
TravelsAmerica Visitor Profile Report

© TNS 2015



Oklahoma visitors resemble total US travelers

- And the age break follows the US pattern ... with those over 45 much more likely categorized as Functionals while Influencers and Networkers dominate the younger group.



Source: TravelsAmerica Digital Life Segmentation



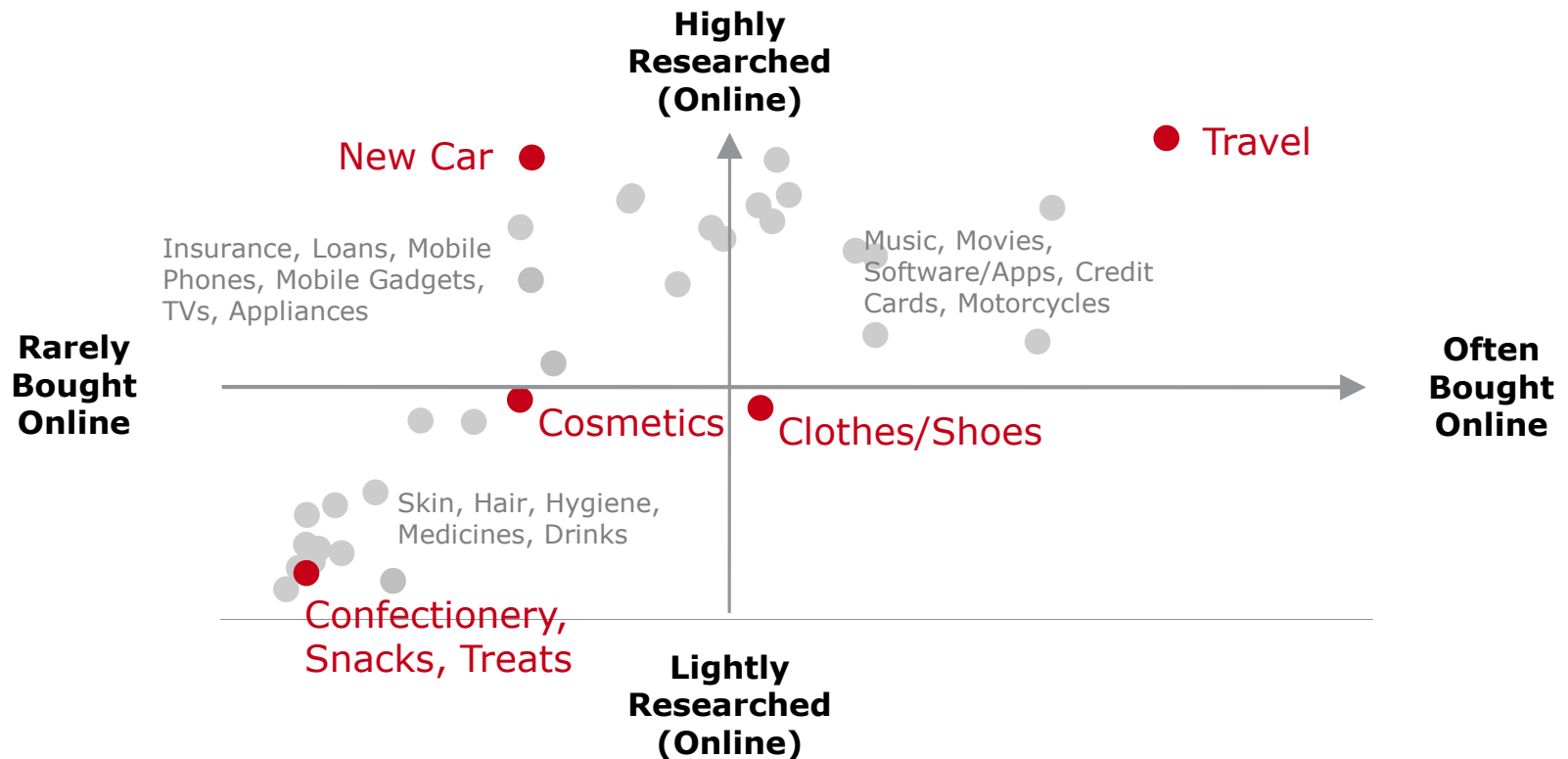
Calendar Year 2014 – Oklahoma
TravelsAmerica Visitor Profile Report

© TNS 2015



Online relevance by product type

- Travel decisions and purchases both heavily depend upon online resources, far more than any other product.



Source: US Digital Life General Report

12

Demographics



Except for lower incomes, Oklahoma visitors resemble Overall US travelers

- Separately, compared to out-of-state visitors, in-state visitors tend to be younger, more likely living in families (3+), and less affluent.

| Demographics | All US Travelers 2013 | All US Travelers 2014 | Oklahoma Visitors Total 2013 | Oklahoma Visitors Total 2014 | Oklahoma In-State Visitors CY 2013 | Oklahoma In-State Visitors CY 2014 | Oklahoma Out-of-State Visitors CY 2013 | Oklahoma Out-of-State Visitors CY 2014 |
|--------------------------|-----------------------|-----------------------|------------------------------|------------------------------|------------------------------------|------------------------------------|--|--|
| Average Age | 48 | 48 | 48 | 48 | 45 | 45 | 50 | 51 |
| Average Household Income | 73,600 | 76,400 | 65,500 | 69,700 | 61,900 | 62,000 | 68,400 | 75,200 |
| % Male | 28 | 29 | 28 | 32 | 27 | 28 | 29 | 34 |
| % Married | 57 | 57 | 58 | 59 | 58 | 59 | 57 | 60 |
| Household Composition | | | | | | | | |
| % One Person | 23 | 23 | 26 | 22 | 23 | 19 | 29 | 25 |
| % Two People | 37 | 37 | 35 | 40 | 33 | 37 | 36 | 41 |
| % Three or More | 39 | 40 | 39 | 38 | 44 | 44 | 35 | 34 |
| Ethnicity | | | | | | | | |
| % Caucasian | 86 | 87 | 85 | 88 | 84 | 86 | 85 | 90 |
| % African-American | 5 | 5 | 6 | 4 | 3 | 4 | 8 | 4 |

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Demographics vary by trip purpose

- Oklahoma business travelers tend to be younger, more affluent, more likely married, and more likely living in larger families
- Overnighters earn somewhat more, but otherwise look like similar to day-trippers.

| Demographics | Oklahoma Visitors Total 2014 | Oklahoma Leisure Visitors | Oklahoma Business Visitors | Oklahoma Day-Trippers | Oklahoma Overnight (O/N) Visitors |
|--------------------------|------------------------------|---------------------------|----------------------------|-----------------------|-----------------------------------|
| Average Age | 48 | 49 | 45 | 49 | 48 |
| Average Household Income | \$69,700 | \$70,700 | \$90,700 | \$59,500 | \$75,100 |
| % Male | 32 | 32 | 42 | 29 | 33 |
| % Married | 59 | 59 | 77 | 58 | 60 |
| Household Composition | | | | | |
| % One Person | 22 | 23 | 14 | 21 | 23 |
| % Two People | 40 | 41 | 27 | 41 | 39 |
| % Three or More | 38 | 36 | 59 | 39 | 38 |
| Ethnicity | | | | | |
| % Caucasian | 88 | 88 | 90 | 90 | 87 |
| % African-American | 4 | 5 | 3 | 2 | 5 |

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)



Visitors to Oklahoma and key competitors share similar demographic profiles

Exceptions:

- Texas visitors earn somewhat more; Arkansas visitors somewhat less
- Texas relies most heavily on in-state travelers and visitors more likely live in families.

| Demographics | Oklahoma Visitors CY 2014 | Kansas Visitors CY 2014 | Texas Visitors CY 2014 | Arkansas Visitors CY 2014 |
|---------------------------|------------------------------|----------------------------|---------------------------|------------------------------|
| Average Age | 48 | 48 | 47 | 49 |
| Average Household Income | \$69,700 | \$69,700 | \$74,400 | \$64,700 |
| % Male | 32% | 31% | 28% | 29% |
| % Married | 59 | 55 | 59 | 63 |
| % In-State Visitor | 41 | 43 | 71 | 41 |
| Household Composition | | | | |
| % One Person | 22 | 29 | 21 | 23 |
| % Two People | 40 | 35 | 35 | 37 |
| % Three or More | 38 | 35 | 45 | 40 |
| Ethnicity | | | | |
| % Caucasian | 88 | 92 | 86 | 88 |
| % African-American | 4 | 3 | 6 | 7 |
| Total Households (Census) | 1,444,081 | 1,110,440 | 8,886,471 | 1,129,723 |

Census: <http://quickfacts.census.gov/qfd/index.html>

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)



13

Background and Research Methods



Introduction and purposes of the research

| | |
|---|--|
| BRAND | <ul style="list-style-type: none">■ Oklahoma Tourism & Recreation Department  |
| STUDY HISTORY AND DESIGN | <ul style="list-style-type: none">■ The first TravelsAmerica report for Oklahoma Tourism & Recreation Department■ Online data collection conducted continuously throughout the year by TNS as a nationwide syndication. |
| STUDY OBJECTIVES – ASSESSMENT OF THESE TOPICS: | <ul style="list-style-type: none">■ Proportion of Visitors to the State of Oklahoma: Overnight, Day, Business, Leisure, Residents, Non-Residents■ Profile of Visitors to Oklahoma:<ul style="list-style-type: none">■ Source of Visitors: state and DMA of visitor residence■ Basic Demographics: age, children in household, income■ Trip Characteristics: day vs. overnight, business, spending, length of stay, activities selected■ Mode of Transportation: air, own auto/truck, rental car, other■ Export/Import “Balance of Trade” Assessment: spending by Oklahoma residents traveling elsewhere vs. non-Oklahoma residents visiting Oklahoma; also includes domestic spending by visitors living in Oklahoma■ Competitors: Kansas, Texas, Arkansas snapshot comparisons■ Digital Life: Digital lifestyles of Oklahoma visitors |

Glossary

| Term | Definition |
|----------------------------|--|
| Balance of Trade | Net Export-Import (Surplus = +; Deficit = -) |
| Import | Money departing the state (Oklahoma residents vacationing elsewhere) |
| Export | Money entering the state (Non-Oklahoma residents visiting Oklahoma) |
| DMA | Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US) |
| Calendar Year | January 1 through December 31 |
| In-State | Oklahoma Residents |
| Out-of-State | Non-Oklahoma Residents |
| Person-Trip | Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips) |
| Respondent/Household Level | Respondent information – one count per respondent |
| Source of Visitors | Residence of visitors |
| State/Region Level | Information about all trips taken to a particular state/region (each trip to area counts) |
| Travel Party | Traveler plus all companions, including children |
| Trip | Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator) This eliminates some leisure day trips that are closer than 50 miles from home |
| Trip Level | Information about all trips – each trip counts |
| Trip Volume | All trips summed together |
| Visitor | Person who has visited Oklahoma in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer). The focus of this report is a Oklahoma Visitor Profile Study, January – December 2014. |

Type of activity summary

| | |
|-----------------------------------|---|
| Art & Culture | Art galleries, historic sites/churches, museums, musical theater, Native American ruins/rock art, local folk arts/crafts, old homes/mansions, theater/drama, symphony/opera/concert, musical performance/show |
| Adventure Sports | Hang gliding/skydiving, hike/backpack, mountain biking, rock/mountain climb, scuba dive/snorkel, ski/snowboard, water ski, whitewater raft/kayak/canoe |
| Sports and Recreation | ATV/fourwheeling, bike, fish, golf, horserace, horseback ride, hunt, major sports event, motor sports (NASCAR/Indy), motor boat/jet ski, sail, snowmobile, snow sports besides ski/snowmobile, sports major/pro, sports youth/amateur/collegiate (spectator or participant), tennis |
| Nature/ Outdoor Activities | Beaches, bird watch, camp, caverns, nature travel/ecotour, wildlife view, zoos, farms/ranches/agritours, other nature (photography, rockhound, etc.) |
| Entertainment/Amusement | Casino/gaming, fine dining, nightclubs/dancing, rodeo/state fair, shop, spa/health club, special events (e.g., Mardi Gras, hot air balloon races), theme park, wine taste/winery tour, craft breweries (small, independent, traditional brewers), distilleries |
| Family Activities/Reunions | Family reunions, high school/college reunions, visiting friends, visiting relatives |
| Sightsee | Rural sightsee, urban sightsee, see area where a TV show or movie was filmed |
| Parks and Gardens | Gardens, state park/monuments/recreation areas, National parks, monuments/recreation areas |

Research methods

DATA COLLECTION PROCESS

- TNS closely manages its Lightspeed US panel by carefully monitoring and limiting the number of contacts with each household in order to keep Internet penetration high and panel fatigue low
- TravelsAmerica is a web-based study with monthly e-mail invitations sent to representative households from its panel
- TravelsAmerica targets a 45% response rate; the field period runs for two weeks, usually starting in the middle of the first week
- Data are weighted as follows:
 - Demographically (such as region, age, income, household size, marital status) to reflect the characteristics of US households
 - Trip and state projection calculations count every trip taken by respondents; detailed information is collected for up to three trips in the past month and projected to the number of households in the total US
 - In addition, a few tables represent person-trips – these take into account the immediate travel party size for each household as well

Oklahoma Visitors and Total Travelers For Calendar Year ending December 31, 2014

| CY 2013 Travelers (Unweighted Respondents) | CY 2014 Travelers (Unweighted Respondents) | CY 2013 Travelers (Weighted by Demographics) | CY 2014 Travelers (Weighted by Demographics) | Region |
|---|---|---|---|---------------------------|
| 1,334 | 1,490 | 1,322 | 1,490 | Oklahoma Residents |
| 1,065 | 1,034 | 1,188 | 1,108 | Oklahoma Visitors (Trips) |
| 65,372 | 62,724 | 66,096 | 64,502 | Total for TravelsAmerica |



Thank you



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513.345.2066

