



Calendar Year 2017 – Oklahoma TravelTrakAmerica Visitor Profile Report & Insights

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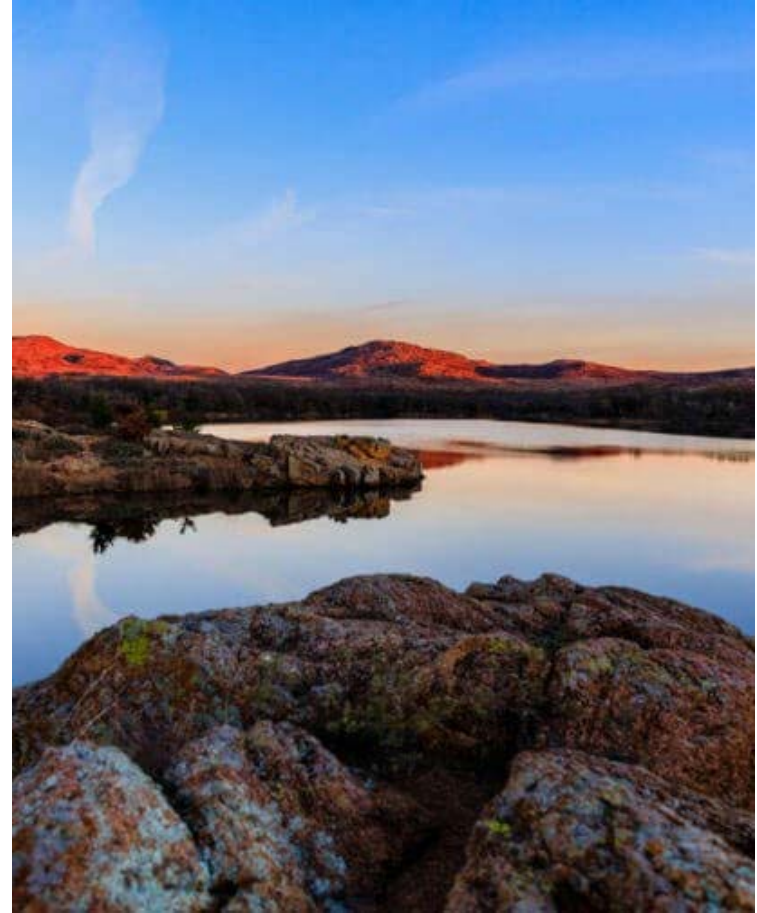
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1 Growth Summary



Growth summary

Growth insights

- In-state visitors represent over a third (38%) of total visitors, while Out-of-state travelers are predominantly from Texas (28%) followed by Arkansas (7%), Kansas (5%), and Missouri (4%).
- Entertainment and amusement visitors (including Casinos/gaming) are the most lucrative travelers due to their high share of visitors and above average spending.
- The highest spending groups are those coming to the State for Sports/recreation, art/culture, or sightseeing; although due to their lower numbers, these travelers form a smaller portion of total spending.
- Although those coming to visit Family/Friend/ Reunions, are a significant share of travelers – their lower spending makes them less lucrative in driving the industry.
- Oklahoma's online presence is essential for reaching potential visitors; a growing share rely on online sources to book their trips. Furthermore, most travelers say they rely heavily on the internet for their daily lives and for researching products and services.

Precise plans for growth

- Maintain efforts to reach out to In-state visitors; this year saw a reduction in visitors from this vital segment, resulting in reduced overall visitor numbers.
- As advertising budgets allow, improve communications to Out-of-state visitors, notably Texas, but also surrounding States within driving distance.
- Step up the promotion of activities that attract younger visitors and larger spenders, particularly the many sports/recreation, adventure, and sightseeing options available in the state. These travelers are the most lucrative segments in terms of spending power.
- Encourage residents and Family/Friend/Reunion visitors to use social media as ambassadors to bring other potential visitors to “come see Oklahoma for themselves.”
- Nearly a third of all travelers say they spend a great deal of time on social media. Encourage these low cost communication channels when possible to attract visitors as friends/family can provide trustworthy recommendations on travel plans.
- Ensure that visitors are satisfied with their travels; while Oklahoma has retained a consistent level of visitor satisfaction, some competing States have pulled ahead.

Purposes/primary objectives of research

Brand/History

Oklahoma Tourism & Recreation (OTRD)



- 4th report for OTRD
- Continuous online data collection via TravelTrak America

Visitor Type

Visitors to the State of Oklahoma – type and purpose of trips:

- Overnight
- Day
- Business
- Leisure
- Residents
- Non-residents

Profile

Characteristics:

- Visitor source - residence: State and DMA
- Demographics: age, children, income
- Trip characteristics: day vs. overnight, business vs. leisure, spending, length of stay, activities
- Transportation
- Competitors (KS, TX, AR, MO)

Benefits

Balance of Trade:

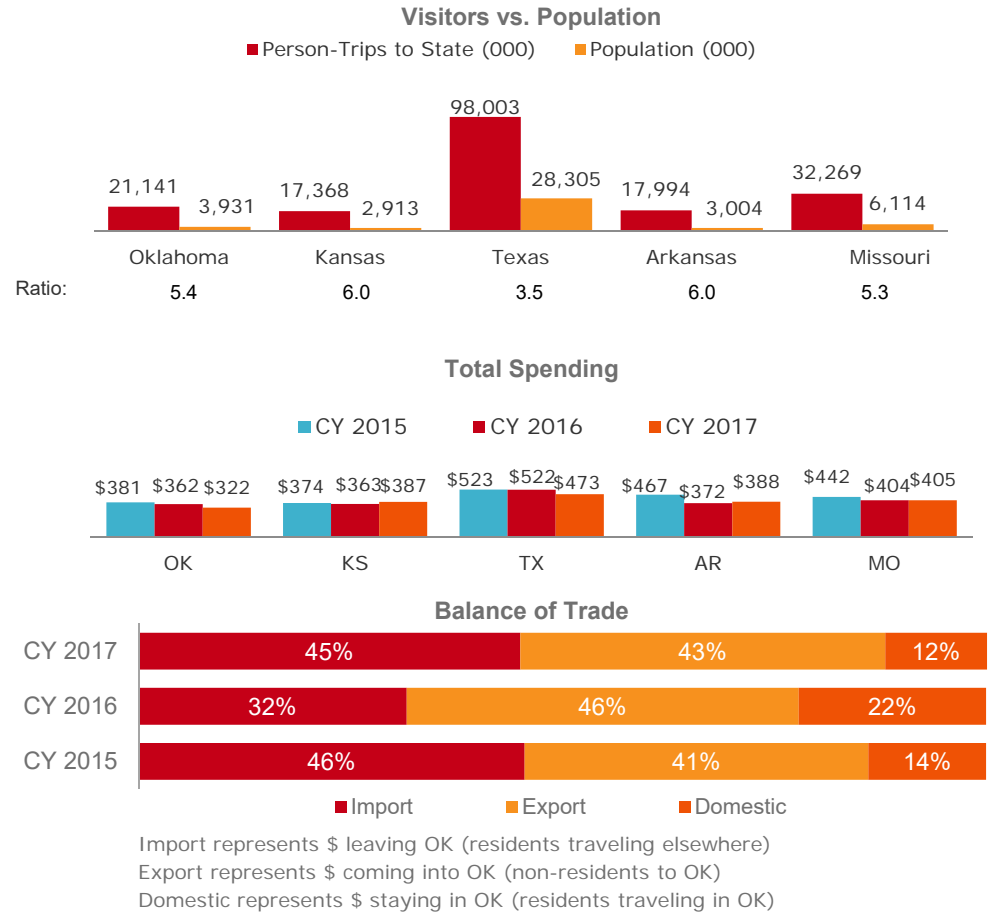
- Export/Import spending (non-OK residents spending in OK vs. OK residents traveling elsewhere)
- “Domestic spending” (OK residents vacationing within the state)
- Understanding the most lucrative segments: entertainment/amusement, families, art/culture, and sports/recreation

2 Executive Summary



Tourism remains a leading export for 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, 5.4 visitors per person, shows Oklahoma near the middle of its competitors and similar to Missouri.
- Oklahoma spending continued to dip this year to \$322 per visitor. Other States’ average spending was mixed; Texas also declined and Kansas/Arkansas ticking upwards. Noteworthy, Oklahoma continues to lag behind the regional competitive set.
- Oklahoma’s “balance of trade” declined to levels similar to CY2015. These terms of trade are the result of both a surge in import spending and reductions In-State visitors (domestic spending).

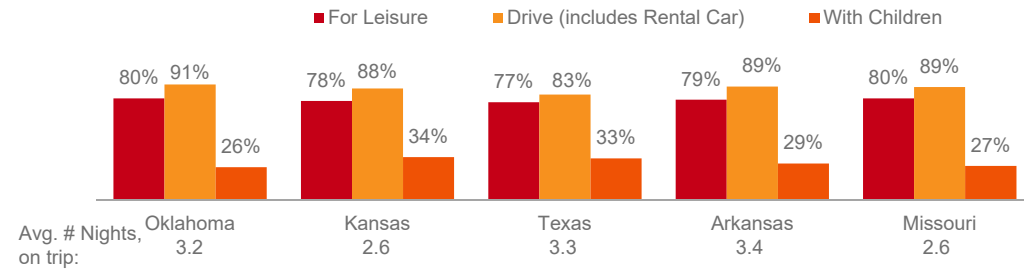


Visitor profile insights: How they get to Oklahoma and what they do

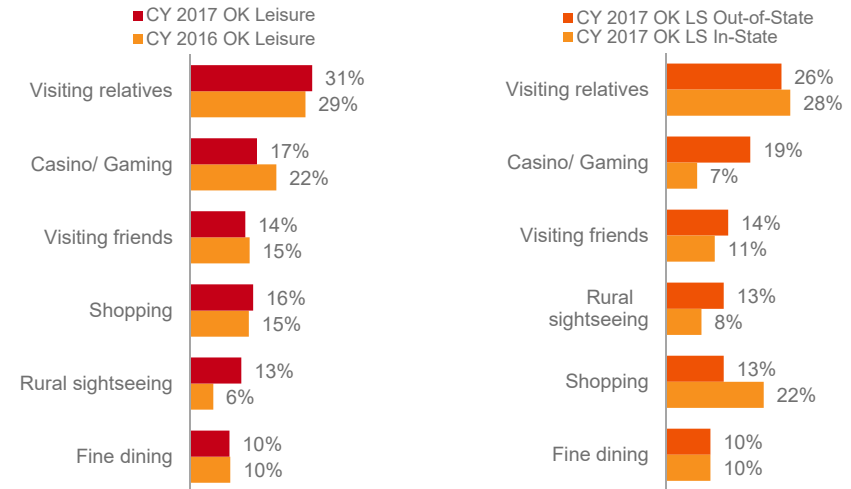
- Travelers to Oklahoma are similar to competitive States; Approximately four out of five come for leisure, spend three nights on their trip, and most drive. One differentiator is fewer visitors come to the State with children; likely due to higher Casino/gaming.

- Casino/gaming activities trended lower this year, being replaced by other activities such as sightseeing and visiting relatives.
- Both in- and out-of-state visitors primarily visit relatives and shopping, but other choices vary, with out-of-state visitors much more likely to take advantage of Oklahoma's gaming opportunities.

Trip Purpose, Mode, Companions, Overnights



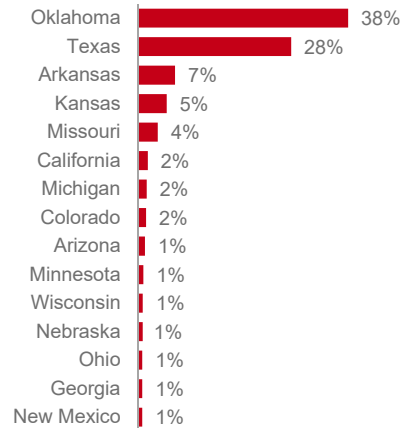
What Visitors Choose to Do



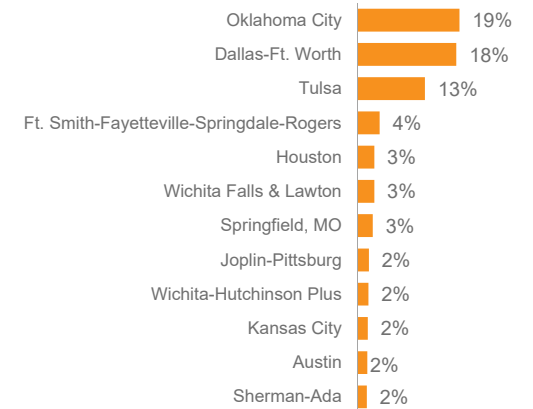
Profiles Continued: From where they come ... to where they go

- Oklahoma continues to draw visitors foremost from within its borders and Texas, followed by Arkansas, Kansas, and Missouri. Similar to many other destinations, key source markets often border Oklahoma.

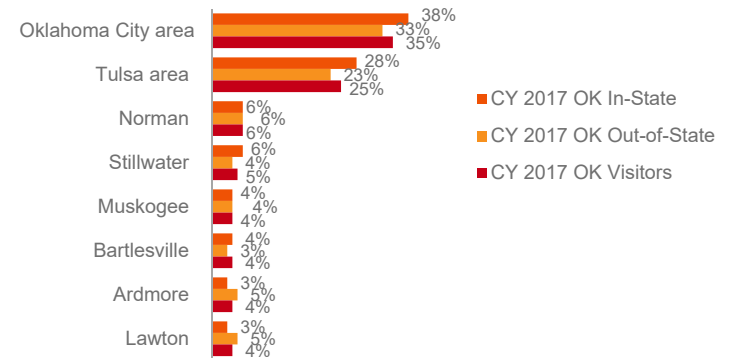
- The largest Oklahoma cities attract the most visitors, regardless of where the visitors live. Few differences appear by in-state or out-of-state residence.



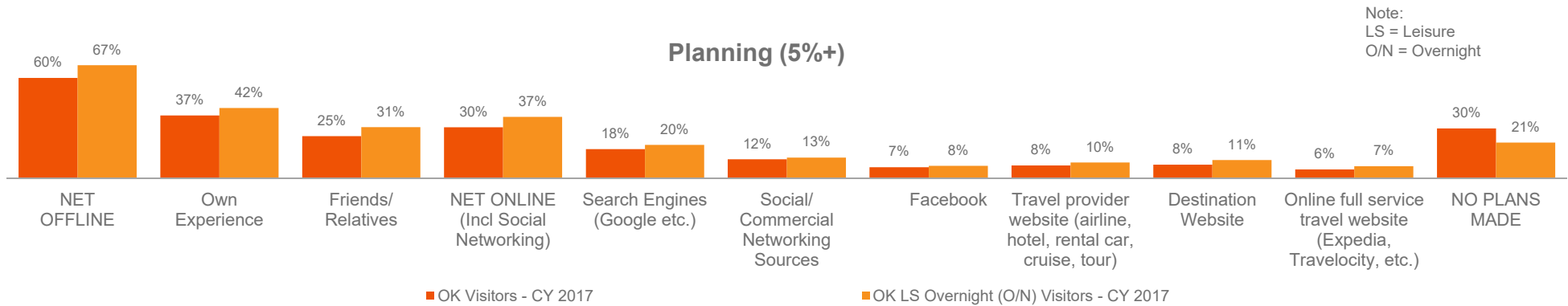
From Where (CY 2017) ...



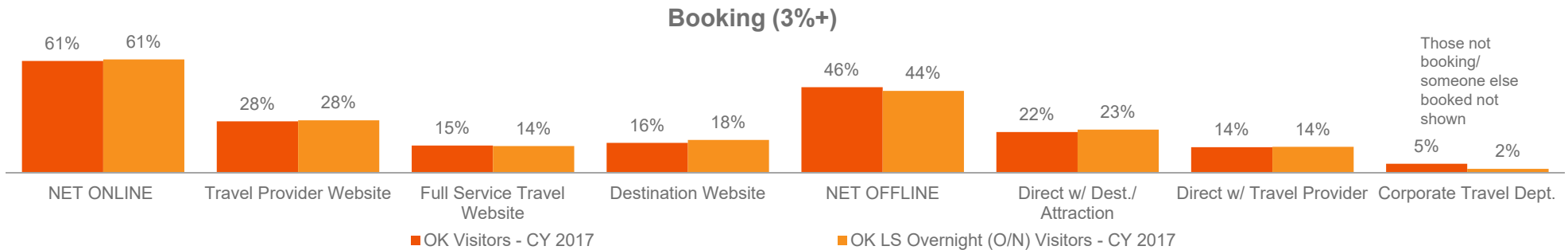
To Where...



For planning trips, Oklahoma visitors most commonly use their own experience or word of mouth (either via friends/relatives or social media); many use search engines as well



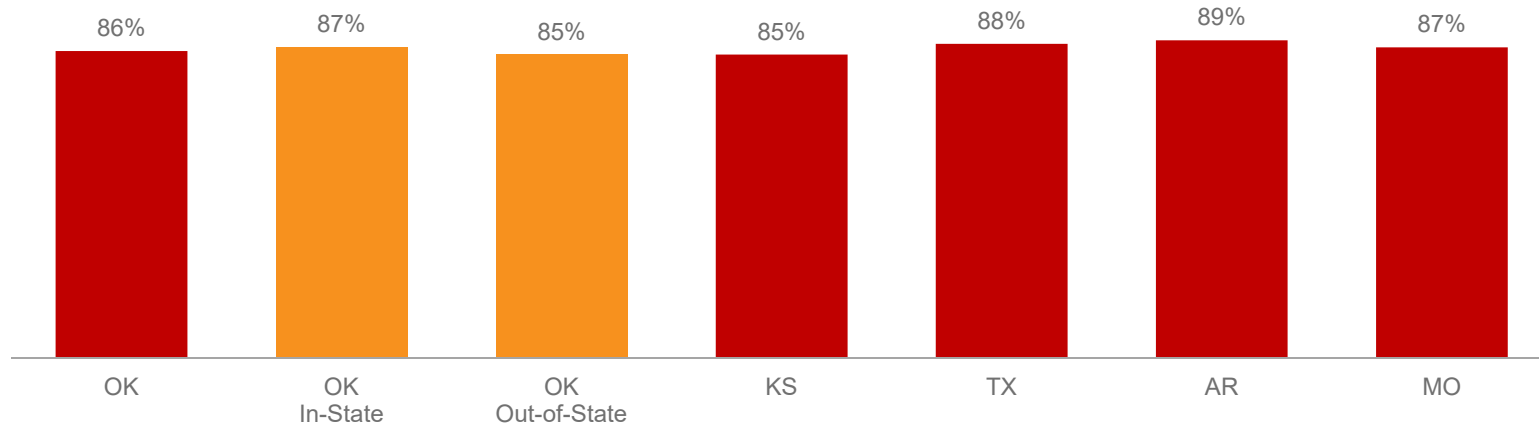
For booking, the majority of overnight leisure visitors use online websites.



Oklahoma sends visitors home happy

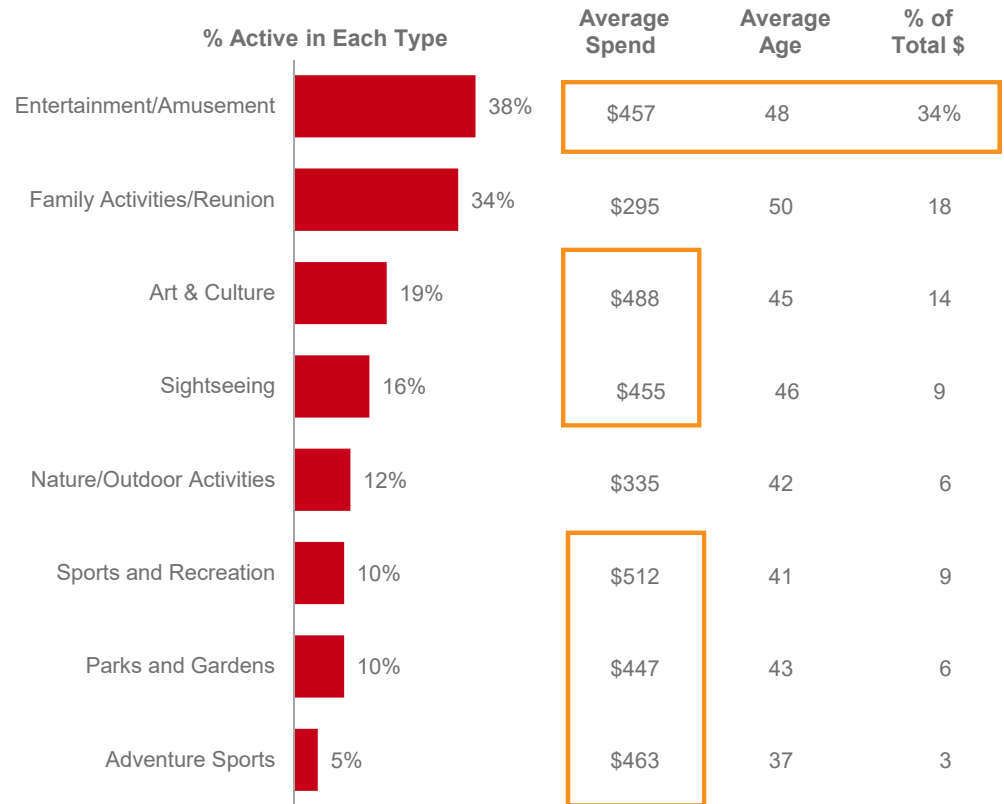
- Very similar to its primary competitors, Oklahoma satisfies visitors, with residents (who likely have greater familiarity with the state) noting stronger satisfaction than non-residents. Arkansas has the highest satisfaction among the competitive set of States.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2017)



Visitor spending profiles: Average spending and share of revenue

- Over a third of revenue comes from *Entertainment/amusement* activities (particularly Casino/gaming) representing the most lucrative segment – the largest share of participants with moderately high spending.
- Although the *family/reunions* segment draws nearly as many visitors as *entertainment/amusement*; due to lower spending, this group is much less lucrative.
- The biggest spenders tend to be those taking at least some interest in Sports/recreation, art/culture, or sightseeing; although due to their lower numbers, these travelers form a smaller portion of total spending.



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

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Appendix: Detailed Results



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Share of Visitors



Oklahoma hosts approximately 21 million visitors annually

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

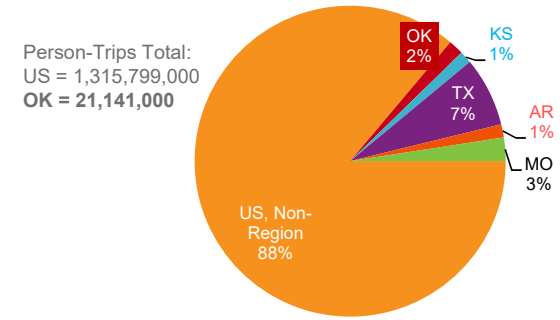
Market Overview:

- OK visitors make up about two percent of total US travel
- OK visitors dipped slightly to 21.1 million in 2017.
- Declining travelers has also reduced the “visitors vs. residents” ratio, from approximately 6 to about 5.4 visitors per resident between 2016 and 2017, respectively.

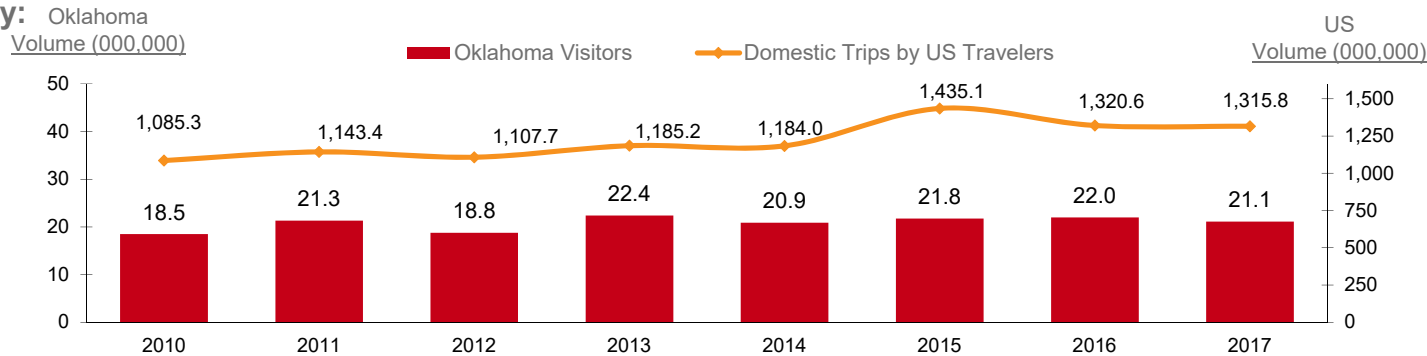
Travel and Tourism Impact

State	Population - 2017 estimate; Census (QuickFacts)	Number of US Visitors to OK in CY 2017
Oklahoma	3,930,864	21,141,000

Visitation – % of Person-Trips: Four States



Market History:



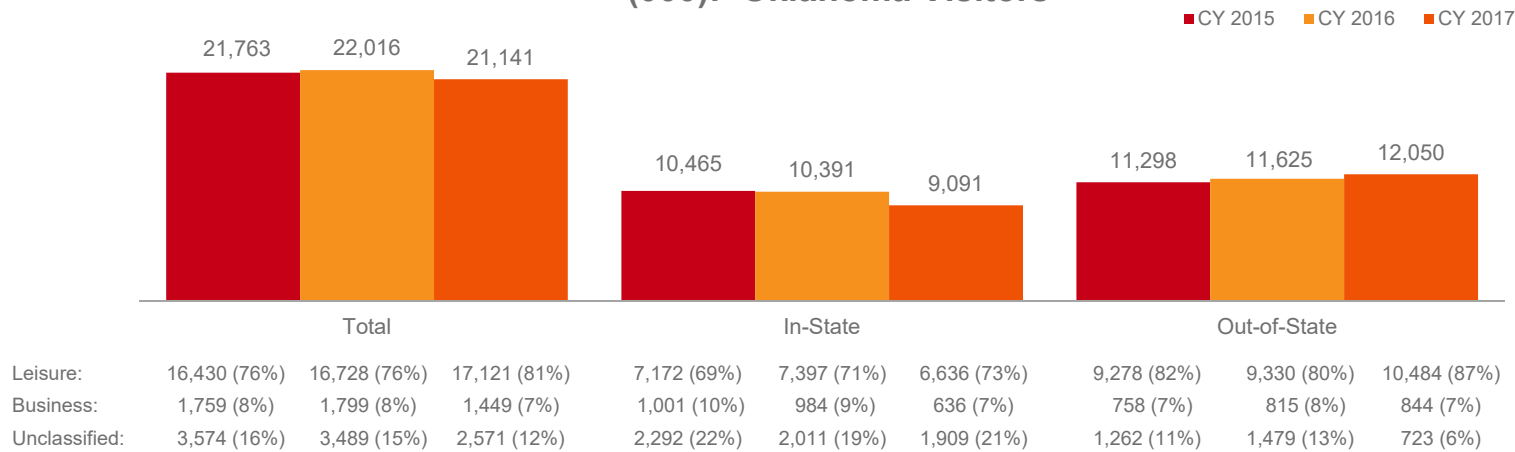
Q4a. Please indicate US state(s) visited; Q3b for households (projected)

Visitor counts slipped this year due to lower In-State travelers

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

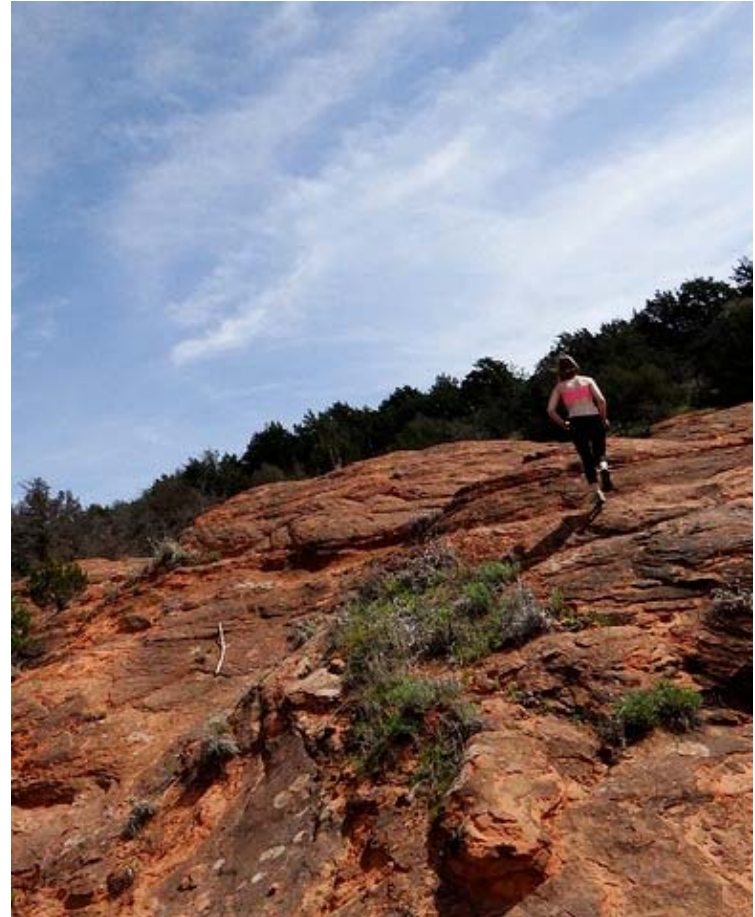
- Although Out-of-State travelers gained between CY 2016 – 2017, lower In-state travelers resulted in an overall decrease of visitors to Oklahoma.
- Leisure continues to dominate, especially among out-of-staters

Visitation – Person-Trips (000): Oklahoma Visitors



Q4a. Please indicate US state(s) visited

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Trip Purpose/Source of Visits/Timing

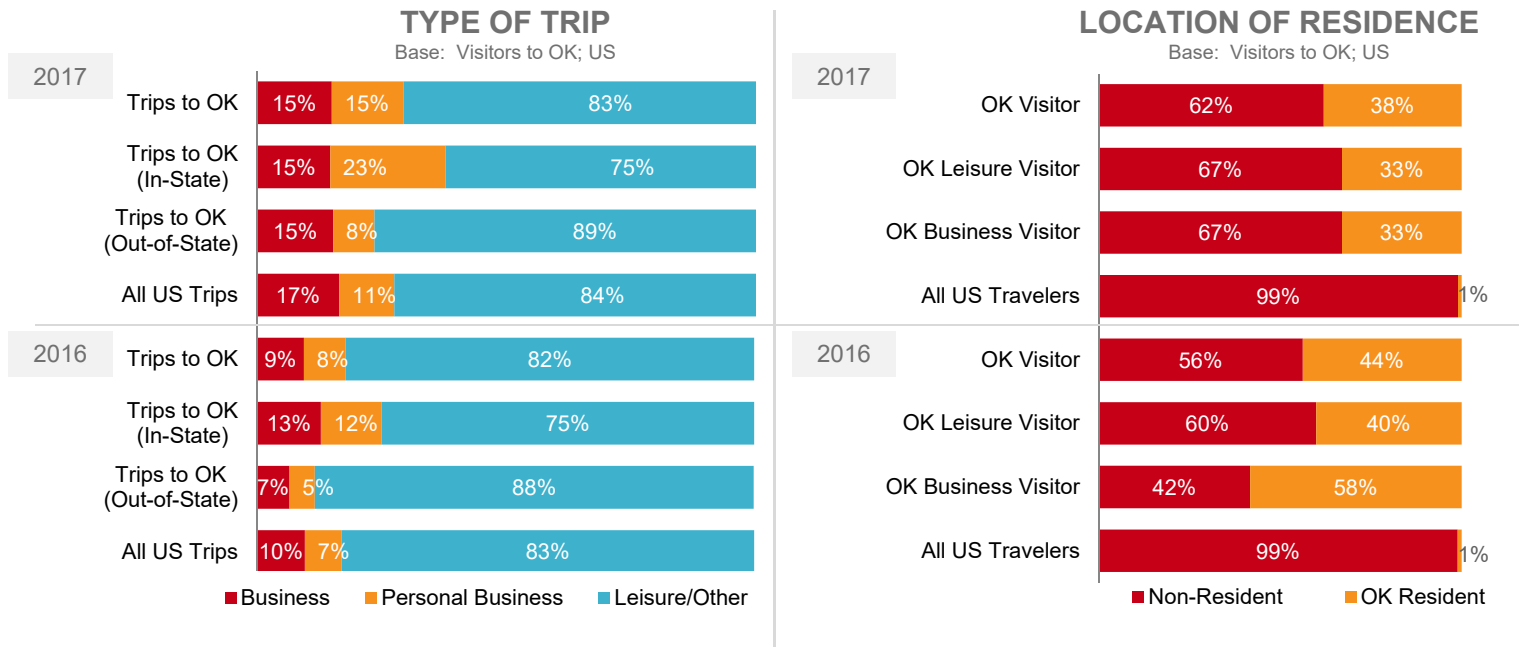


Although visitors usually visit Oklahoma for leisure, a growing share arrive for business

- The proportion of business travelers rose 6 points to 15 percent in 2017. Nearly one-in-three (30%) now come for business or a combination of business/personal.
- Due to declines in In-state visitors, a majority of visitors both for leisure and business now come from Out-of-State.

Trip/Visitor Characteristics

% of Visitors to State



Q4a. Please indicate US state(s) visited

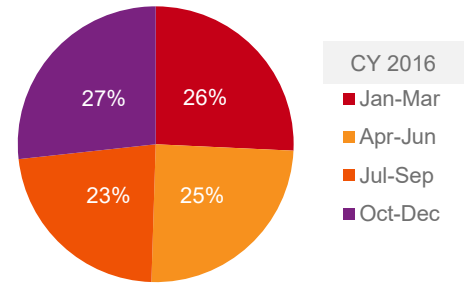
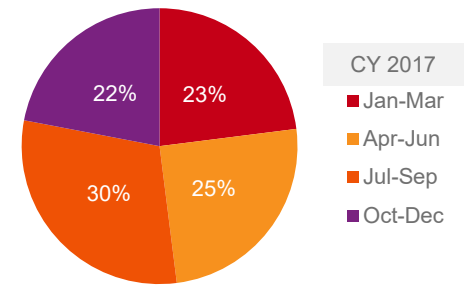
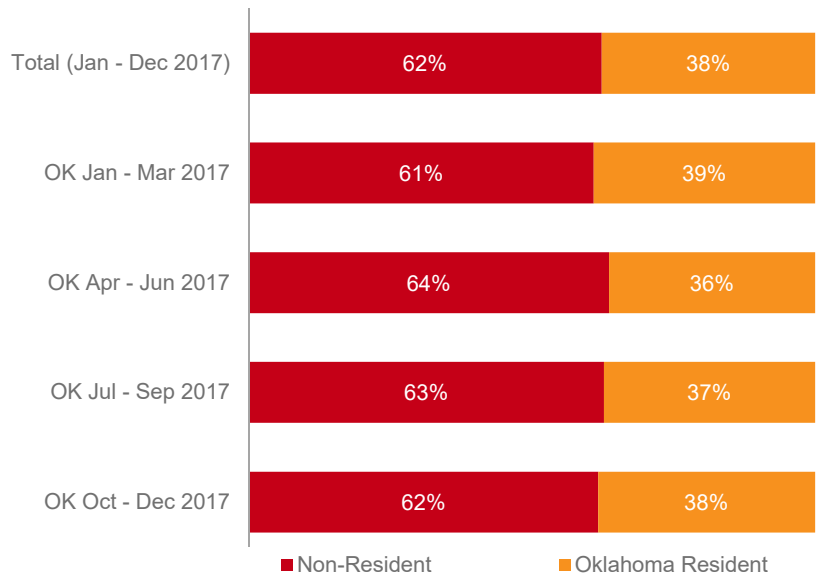
Panel: Residence of visitors (Household Level)

Visitation tends to be fairly stable throughout the year

(22% - 30% by quarter)

SOURCE of Oklahoma VISITORS by QUARTER

Base: Oklahoma Visitors

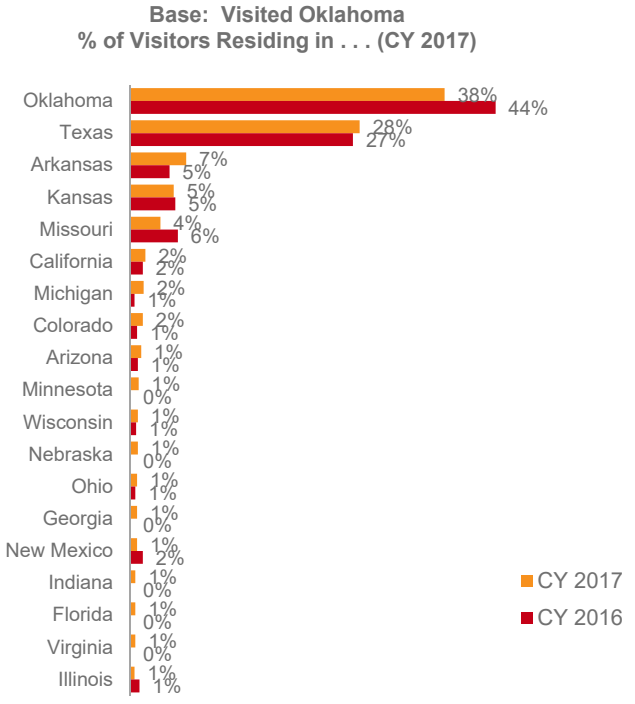


Panel: State/DMA residence of those who visited Oklahoma (Household Level)

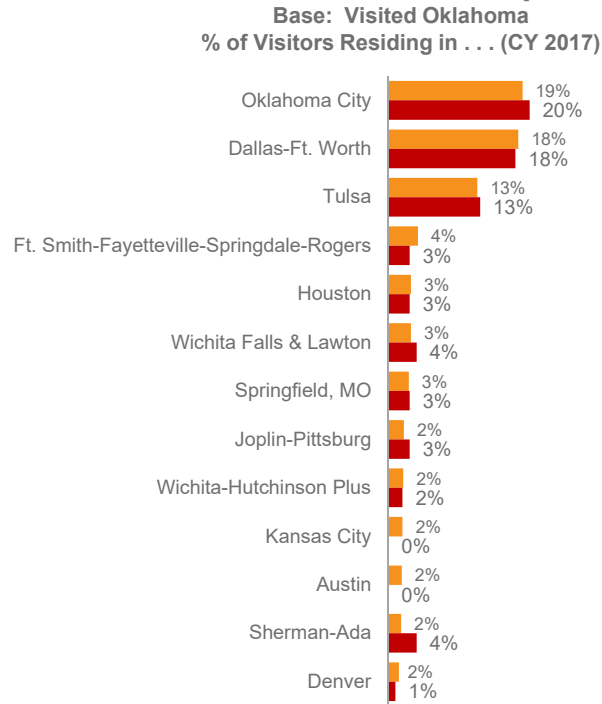
Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)

Neighboring Texas and its respective cities continue to dominate Oklahoma's out-of-state visitor source markets

Source of Visitors: Top States



Source of Visitors: Top DMAs



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

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Planning and Booking



With fewer arrangements needed (lodging, number of meals, etc.) day-trippers and locals (OK residents) spend much less time planning and deciding on an Oklahoma trip

- OK visitor consideration and decision making closely resembles all US domestic travelers.

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2017	OK Visitors Total CY 2015	OK Visitors Total CY 2016	OK Visitors Total CY 2017	OK Visitors Leisure O/N* CY 2017	OK Visitors Leisure Day Trip CY 2017	OK In-State Visitors CY 2017	OK Out-of- State Visitors CY 2017
Considered								
Within Two Weeks	30%	36%	35%	38%	28%	59%	45%	35%
2 – 4 Weeks	16%	16%	18%	16%	17%	14%	18%	16%
1 – 3 Months	19%	17%	20%	17%	17%	11%	20%	16%
3+ Months	35%	31%	27%	29%	44%	19%	18%	34%
Decided								
Within Two Weeks	38%	45%	46%	47%	35%	70%	53%	44%
2 – 4 Weeks	17%	17%	17%	17%	18%	11%	20%	16%
1 – 3 Months	19%	16%	17%	15%	17%	7%	15%	15%
3+ Months	26%	22%	20%	21%	29%	12%	12%	26%

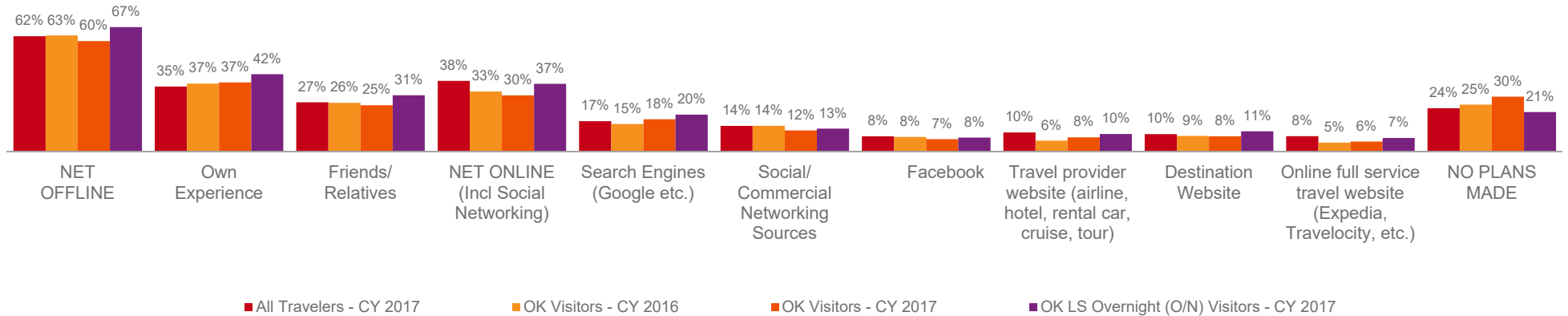
Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

*O/N = Overnight

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

- Visitors also rely on word-of-mouth, either directly or via social/commercial networking; although many take advantage of search engines as well.

Information Sources to Plan a Trip
Ranked by All Sources (5%+)



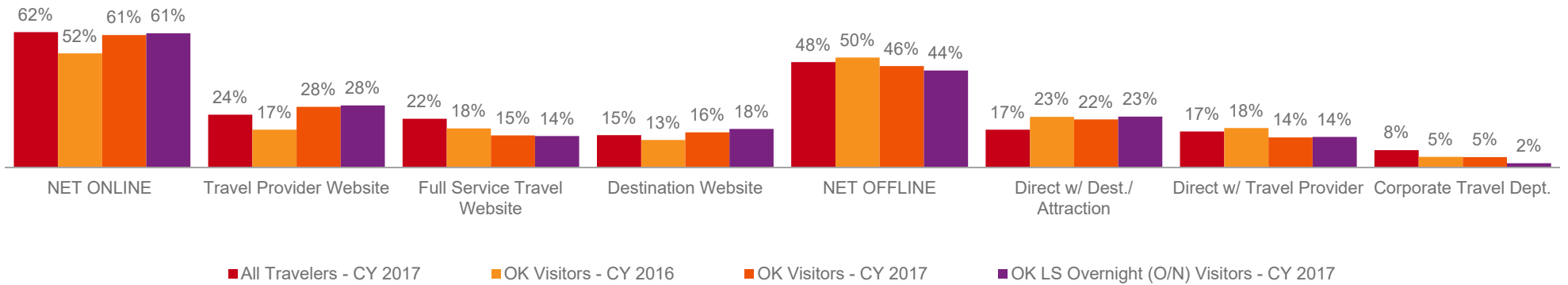
Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

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

LS = Leisure
O/N = Overnight

In 2017, Oklahoma visitors were more likely to book their trips via Online sources, specifically a Travel Provider Website

Method Used to Book Trip Components
Ranked by All Sources (3%+)

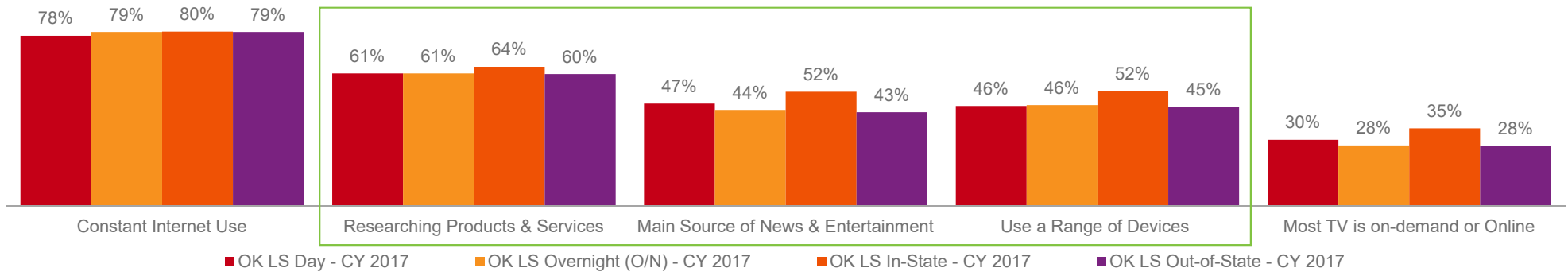
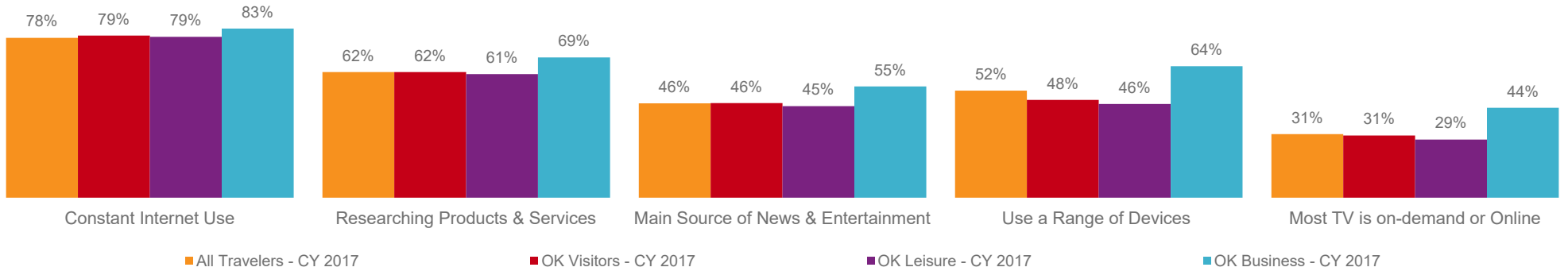


Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

Oklahoma Traveler Perceptions of the Internet

- Most travelers (All domestic and Oklahoma) rely heavily on the internet in their daily lives. On-demand/Online TV is a notable exception.
- Internet usage is similar across groups – with the exception of business travelers who tend to rely more on it.
- Relative to other groups, In-state visitors rely more on the internet for research, news/entertainment, and using a wide range of devices.

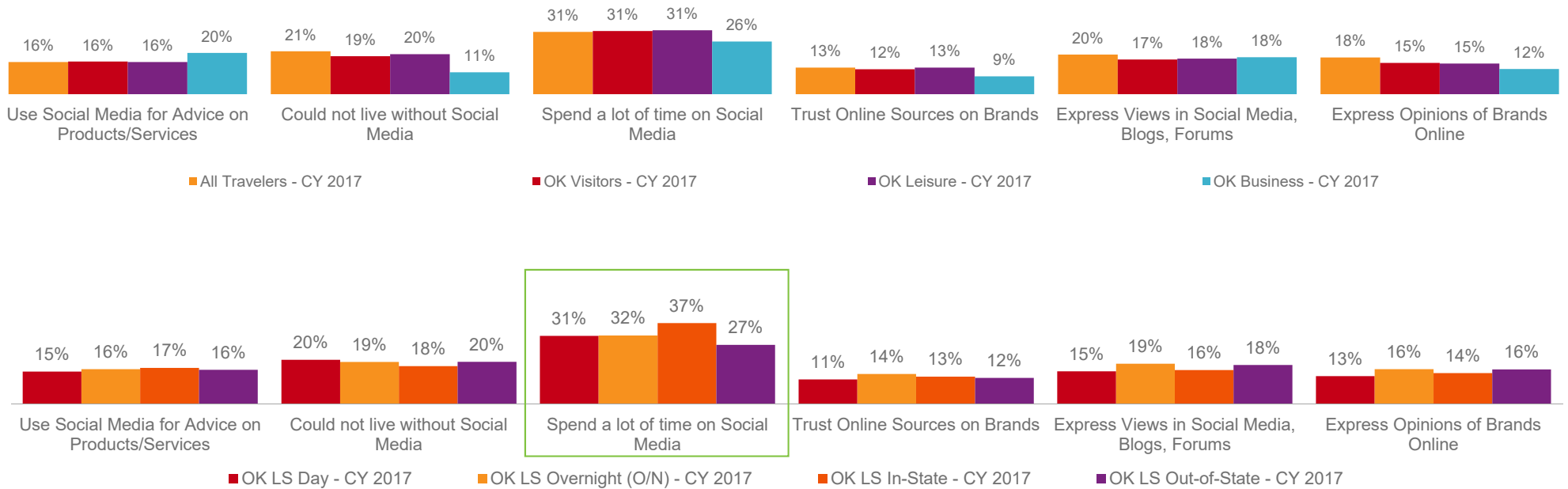


QF1. How important is the internet to you?. (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

Oklahoma Traveler Perceptions of Social Media

- While approximately, one third of all travelers spend a lot of time on social media, a lower percentage turn to social media for advice and opinions on brands, products, and services.
- In-state visitors spend more time on social media compared to other visitor groups.



QF2. How important is social media to you? (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

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Trip Characteristics



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

- Few OK visitors fly; only about a third as many compared to US domestic travelers at-large.
- Out-of-state visitors spend an extra day in Oklahoma (3.6 vs. 2.2 nights for in-staters). Therefore, while total visitor counts may have fallen, the industry may be holding up well due to a larger share of out-of-state travelers and their longer stays.

Trip Choices (Trip Level)	All US Travelers CY 2017	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	81%	80%	100%	100%	70%	86%
Visit Friends/Relatives	44%	43%	57%	44%	42%	43%
Entertainment/Sightsee	14%	13%	16%	17%	7%	17%
Outdoor Recreation	9%	7%	8%	11%	7%	7%
Business	10%	9%	-	-	9%	9%
Personal Business/Other	9%	12%	-	-	22%	5%
PRIMARY MODE						
% Own Auto/Truck	75%	87%	84%	94%	96%	81%
% Rental Car	6%	4%	4%	2%	2%	5%
% Air Travel	14%	5%	7%	-	-	9%
Lodging (State Level)						
	All US Travelers CY 2017	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)	3.5	3.2	2.9	0.0	2.2	3.6
Private Home	1.2	1.1	1.3	0.0	1.1	1.1
Hotel/Motel	1.5	1.5	1.2	0.0	0.6	1.9
Other	0.2	0.2	0.1	0.0	0.1	0.2

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)

Compared to regional States, OK resembles AR/KS/MO, while more TX visitors travel for business and fly

Trip Choices (Trip Level)	All US Travelers CY 2017	Visit OK	Visit KS	Visit TX	Visit AR	Visit MO
PRIMARY TRIP PURPOSE						
NET Leisure	81%	80%	78%	77%	79%	80%
Visit Friends/Relatives	44%	43%	54%	48%	47%	43%
Entertainment/Sightsee	14%	13%	8%	10%	9%	16%
Outdoor Recreation	9%	7%	6%	8%	9%	8%
Business	10%	9%	12%	14%	7%	10%
Personal Business/Other	9%	12%	10%	10%	14%	8%
PRIMARY MODE						
% Own Auto/Truck	75%	87%	83%	77%	83%	86%
% Rental Car	6%	4%	5%	6%	6%	3%
% Air Travel	14%	5%	7%	12%	4%	8%

Lodging (State Level)	All US Trips CY 2017	Visit OK	Visit KS	Visit TX	Visit AR	Visit MO
AVG # NIGHTS (if any)	3.5	3.2	2.6	3.3	3.4	3.1
Private Home	1.2	1.1	1.2	1.4	1.1	1.0
Hotel/Motel	1.5	1.5	1.1	1.3	1.3	1.4
Other	0.2	0.2	0.0	0.2	0.2	0.1

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)

OK visitors are similar across profiles, with the exception of In-State visitors who are more likely to bring children

Trip Characteristics (Trip Level)	All US Travelers CY 2017	OK Visitors Total	OK Visitors for Business	OK Visitors for Leisure (LS)	OK Visitors Overnight (O/N) LS	OK Visitors In-State	OK Visitors Out-of-State
AVG IN TRAVEL PARTY	2.6	2.4	2.1	2.4	2.4	2.5	2.4
% Travel in Pairs	41%	45%	23%	48%	49%	37%	49%
% Travel w/ Children	28%	26%	6%	27%	26%	31%	22%
Avg # Kids Inc. 0	0.5	0.5	0.1	0.5	0.5	0.6	0.4
Avg # Kids Exc. 0	1.9	1.8	1.8	1.8	1.8	2.0	1.6

Trip Characteristics (Trip Level)	All OK Visitors	Q1 Jan – Mar 2017	Q2 Apr – Jun 2017	Q3 Jul – Sep 2017	Q4 Oct – Dec 2017
AVERAGE # IN TRAVEL PARTY (Q3a)	2.4	2.6	2.5	2.2	2.4
% Travel in Pairs	45%	37%	47%	45%	49%
% Traveling with Children	26%	31%	23%	25%	24%
Avg. # of Children on Trip Inc. Zero	0.5	0.7	0.4	0.4	0.4
Avg. # of Children on Trip Exc. Zero	1.8	2.2	1.6	1.5	1.8

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

Oklahoma's travel parties closely resemble AR or MO, while KS and TX are more likely to bring children.

Trip Characteristics (Trip Level)	All US Travelers CY 2017	Visit OK	Visit KS	Visit TX	Visit AR	Visit MO
AVERAGE # IN TRAVEL PARTY	2.6	2.4	2.7	2.6	2.5	2.6
% Travel in Pairs	41%	45%	36%	37%	47%	44%
% Traveling with Children	28%	26%	34%	33%	29%	27%
Avg. # of Children on Trip Inc. 0	0.5	0.5	0.7	0.6	0.5	0.5
Avg. # of Children on Trip Exc. 0	1.9	1.8	2.1	1.9	1.8	1.8

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

Shared Economy Lodging/Rentals and Rideshares

- About one-in-five visitors have ever used a shared economy lodging (Airbnb, etc.); which is lower compared to all US domestic travelers.
- Furthermore, Oklahoma visitors, were also much less likely to use ride shares compared to US travelers at-large. Travelers In-state were particularly less inclined to ride share – likely due to using their own vehicles for travel.

Shared Economy Lodging/Rental (past 12 months)	All US Travelers CY 2017	OK Visitors Total	OK Visitors for Business	OK Visitors for Leisure (LS)	OK Visitors Overnight (O/N) LS	OK Visitors In-State	OK Visitors Out-of-State
NET: Leisure/Business Travel (% Yes)	28%	21%	36%	21%	22%	15%	24%
Leisure Travel	27%	20%	33%	21%	22%	15%	24%
Business Travel	4%	1%	6%	1%	1%	1%	2%

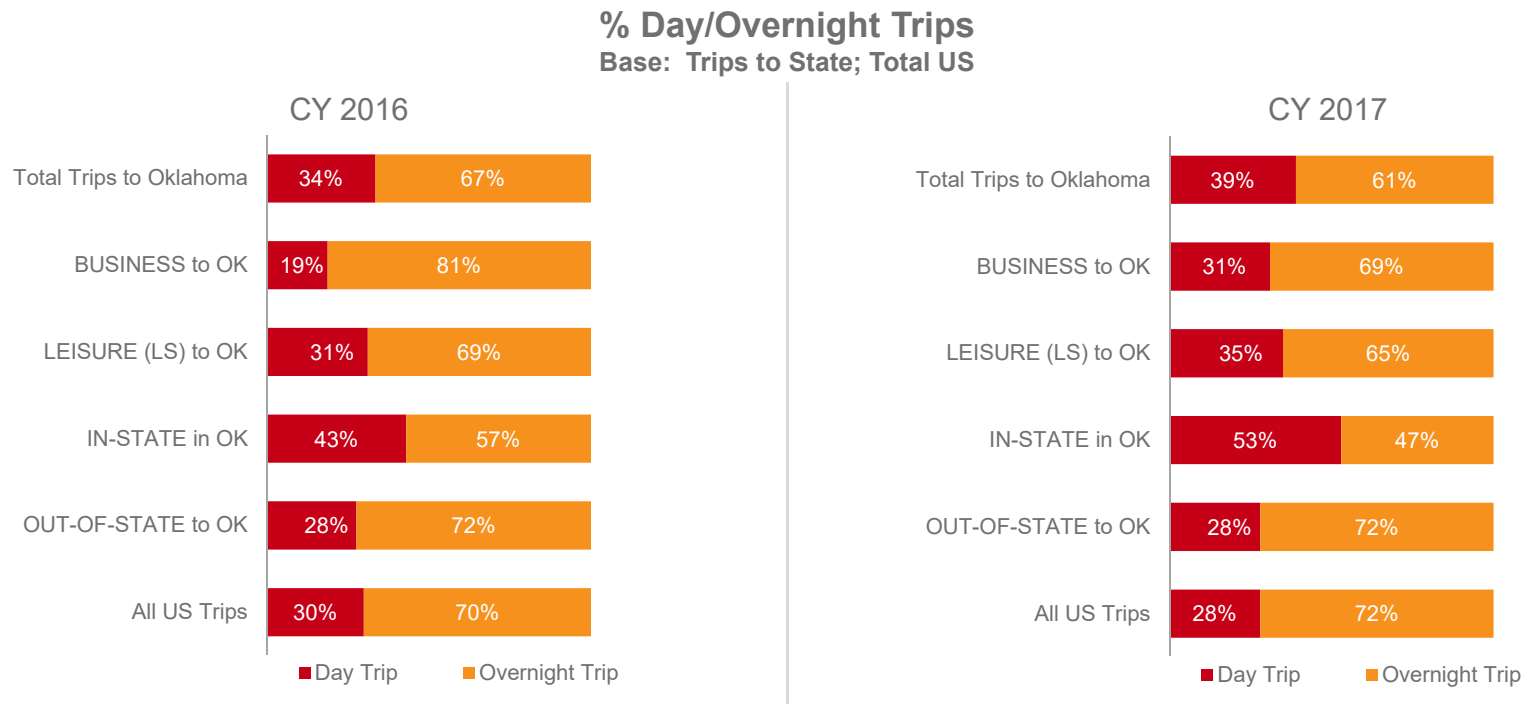
Ride Share Usage (past 12 months)	All US Travelers CY 2017	OK Visitors Total	OK Visitors for Business	OK Visitors for Leisure (LS)	OK Visitors Overnight (O/N) LS	OK Visitors In-State	OK Visitors Out-of-State
NET: Local, Leisure, Business Transportation	35%	20%	41%	19%	20%	16%	23%
Local Transportation	25%	13%	26%	12%	14%	8%	16%
Leisure Transportation	18%	10%	22%	10%	9%	9%	11%
Business Transportation	6%	4%	14%	4%	4%	2%	5%

Q32. Have you used the shared economy (AirBnB, VRBO, etc.) for accommodations for any trips in the past 12 months? (State Level – demo wtd)

Q34. Have you used the shared economy (Uber, Lyft, etc.) for transportation in the past 12 months? (State Level – demo wtd)

Nearly sixty-one percent of OK visitors spend the night, 10 points lower than the US average

- In-state visitors increased their share of day trips, elevating the share for all OK visitors.
- (Note: personal business and other are not classified as either business or leisure trips).

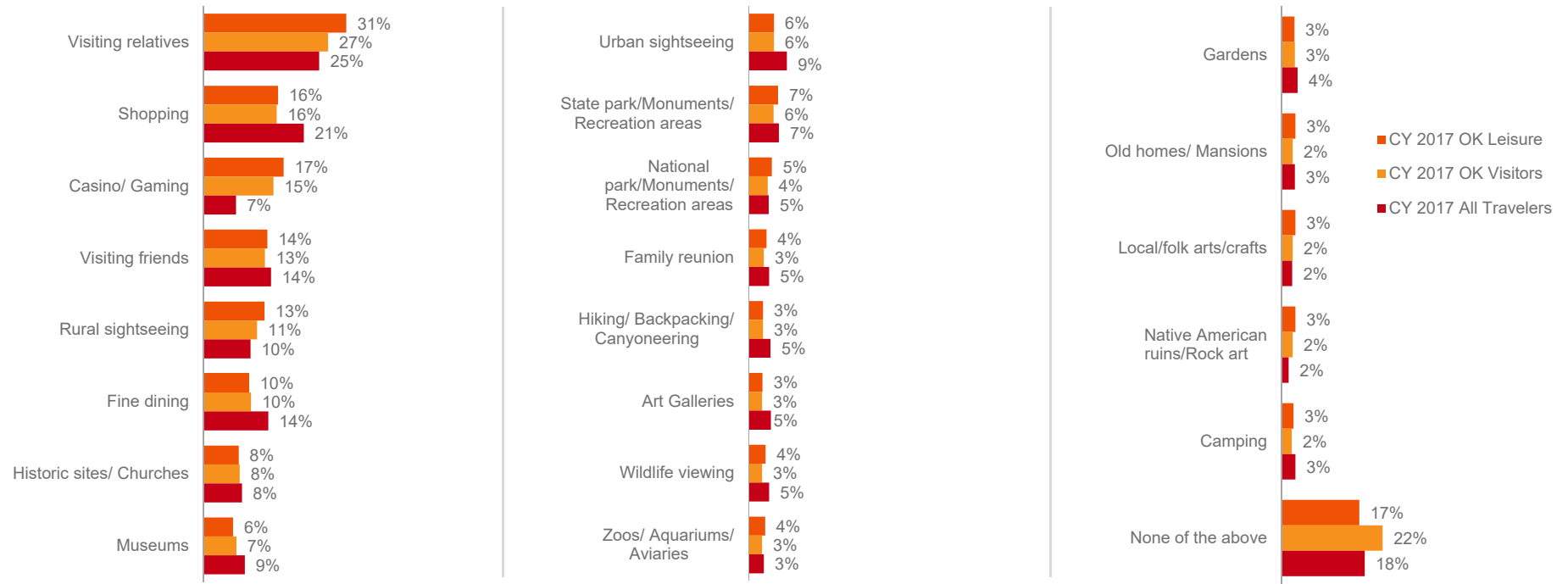


Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

Compared to average US travelers, more OK visitors enjoy casinos/gaming and visiting relatives

- Fewer OK visitors shop, enjoy fine dining, sightsee, or visit museums/historical sites compared to overall US domestic travelers.

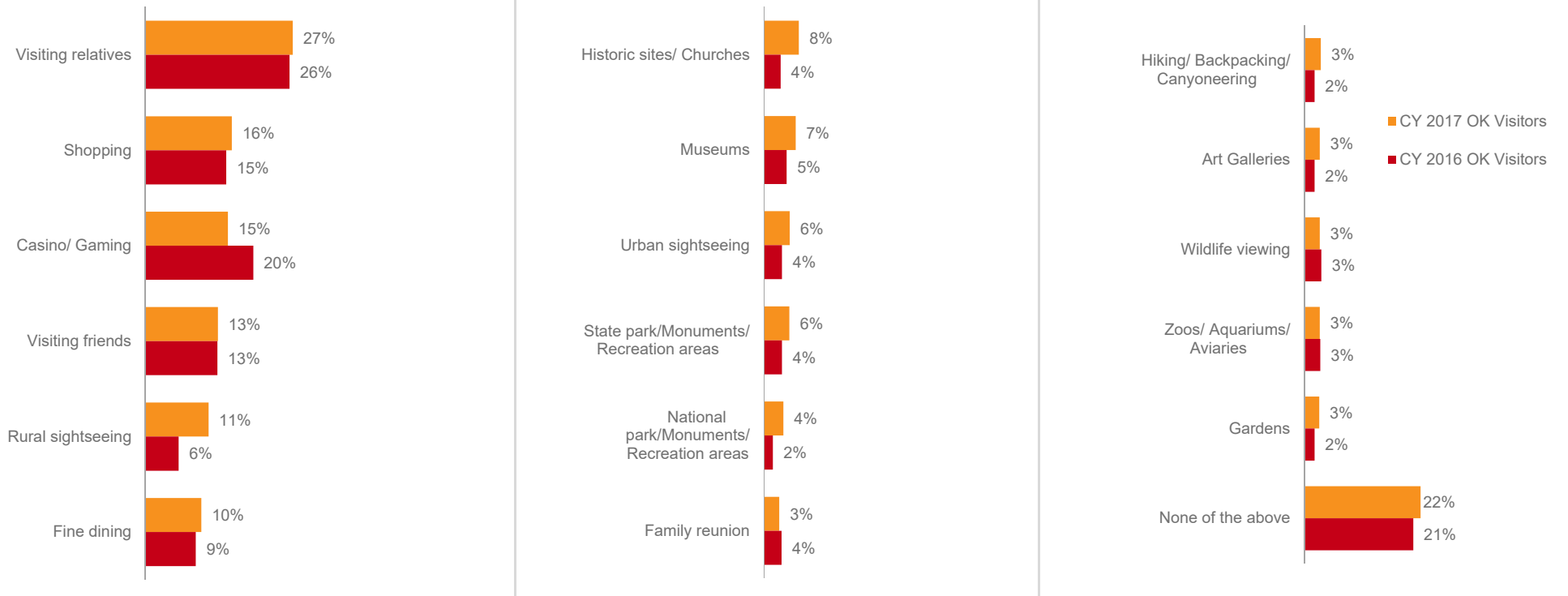
CY 2017 % Activities Participated/Attractions
 Ranked by 2017 Oklahoma Visitors (Activities with <2% for Total not shown)



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

Casino/Gaming declined, while sightseeing (Rural/urban), Historical sites/churches, Museums, Parks, gained.

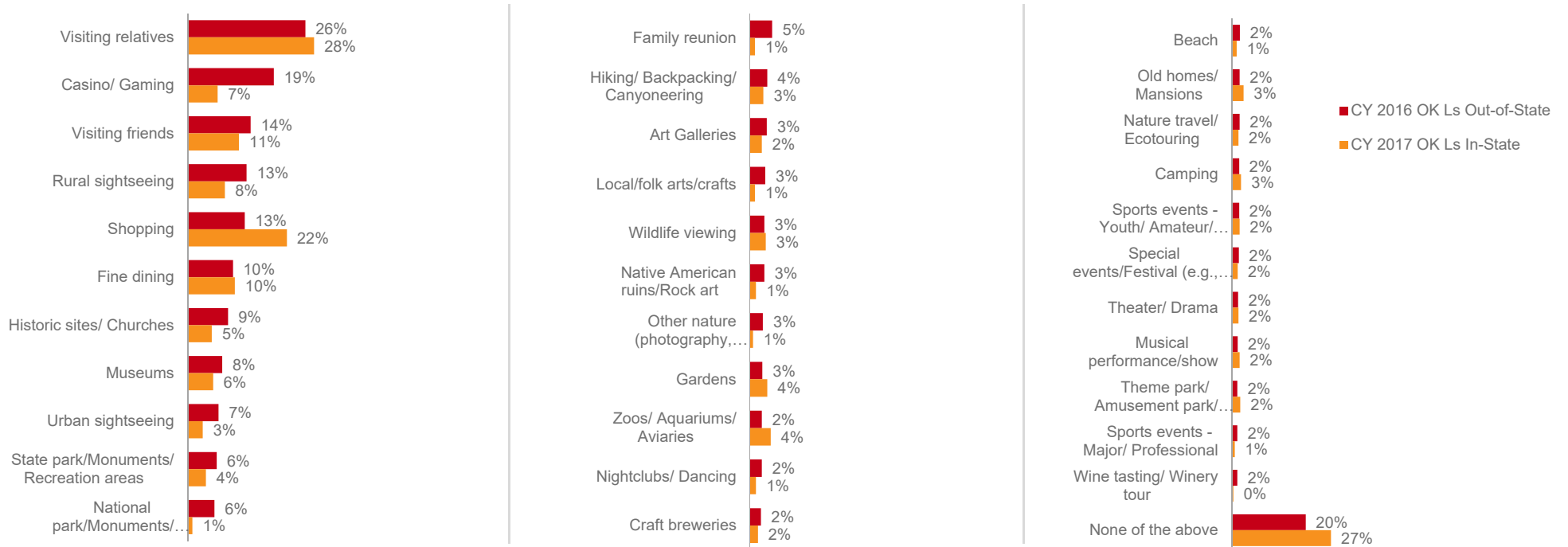
Trend: % Activities Participated/Attractions by Oklahoma Visitors
 Ranked by 2017 Total Oklahoma Visitors (Activities with <2% for Total not shown)



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

Out-of-state visitors overwhelmingly prefer casino/gaming and sightseeing; In-State travelers prefer shopping.

Activities Participated/Attractions Visited by Leisure Visitors % Participated/Visited – Ranked by 2017 Oklahoma Out-of-State Visitors

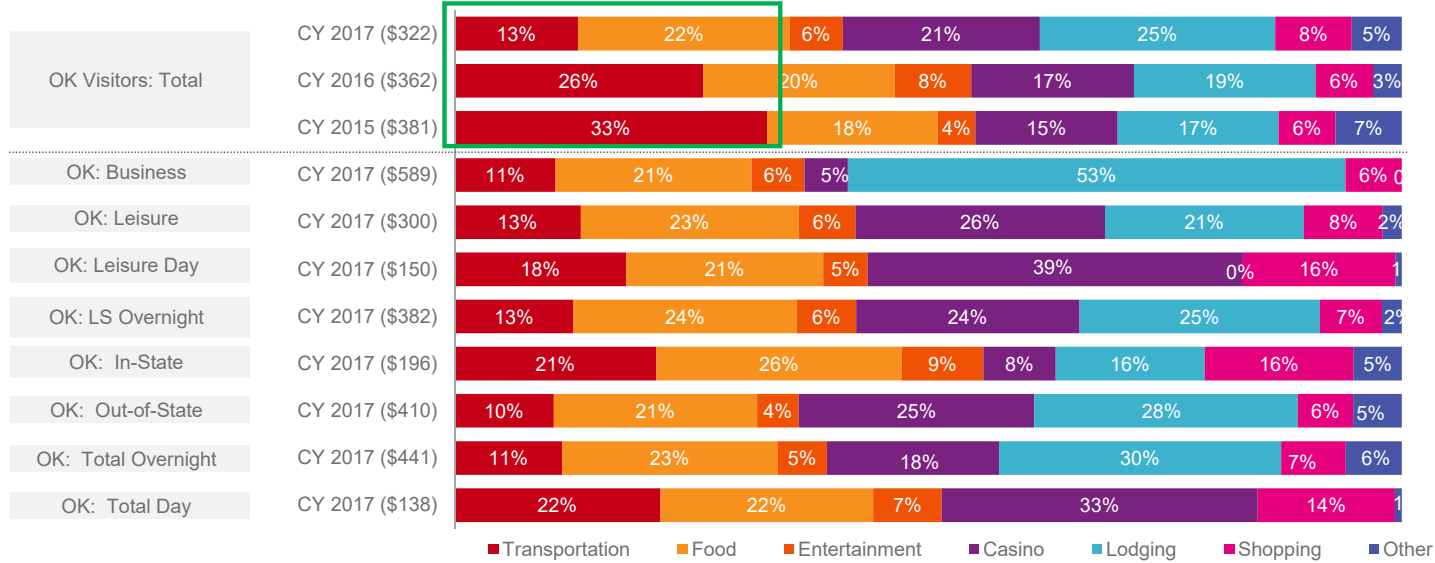


Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Out-of-staters and overnighthers spend the most

- Lower transportation costs are driving a larger proportion of spending on Casino, Lodging, and Shopping.
- Business travelers spend the largest proportion on Lodging, while day trippers spend on Casinos.

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

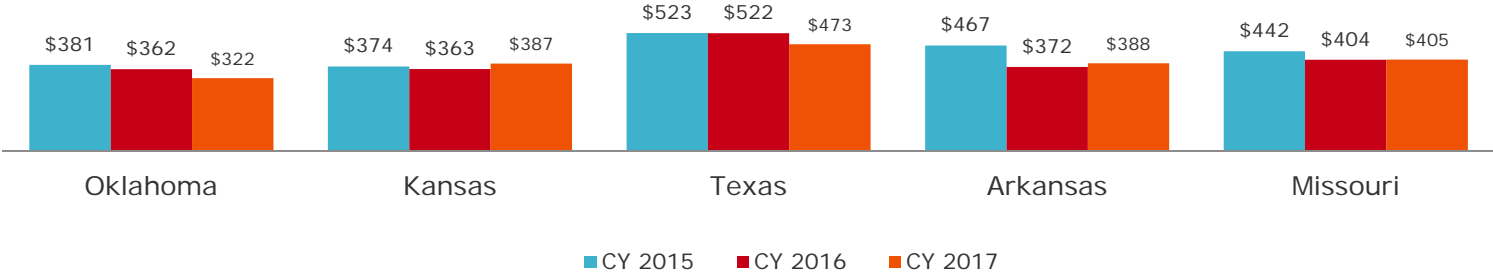


Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

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

OK and TX average spending trended lower while contrary to these States, KS and AR nudged upwards

Average Spending in State, CY 2017
Total Spending by Travel Party



Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd; Total including 0) (Includes those not specifying leisure vs. business trips)

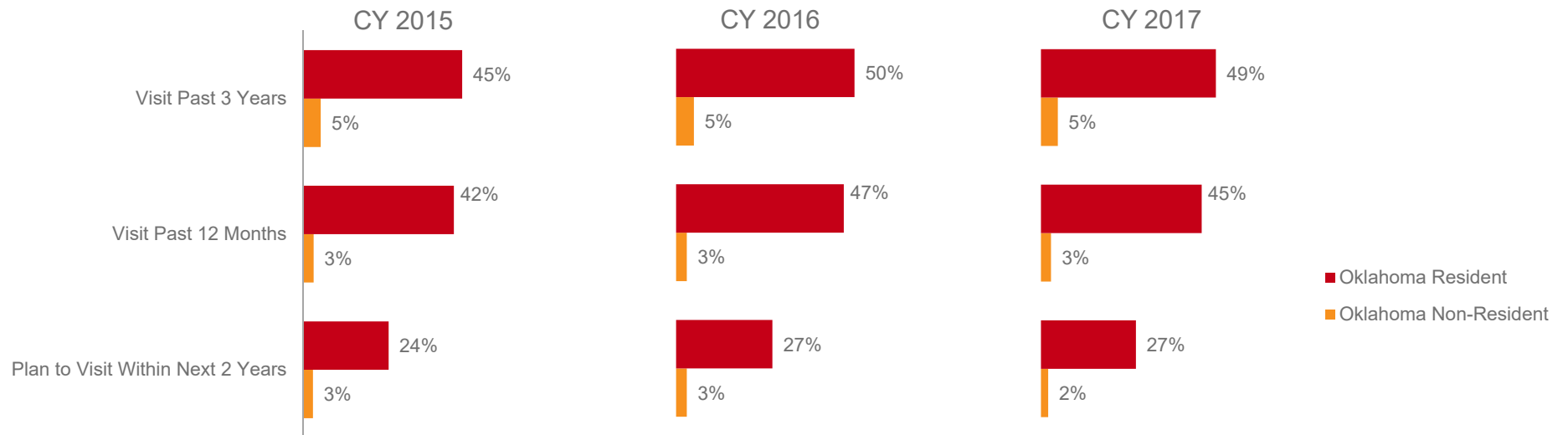
8 Competitive Environment



Oklahoma draws a large share of visitors from residents

- Around 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 – slightly more than in the past (and consistent with higher satisfaction ratings).

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 dwarf other Oklahoma destination choices

Top Oklahoma Destinations
 % Oklahoma Visitors Selecting Area (ranked by CY 2017)

All Oklahoma Visitors	CY 2015	CY 2016	CY 2017	Oklahoma Residents	CY 2015	CY 2016	CY 2017	Non-Oklahoma Residents	CY 2015	CY 2016	CY 2017
Oklahoma City area	32%	32%	35%	Oklahoma City area	32%	35%	38%	Oklahoma City area	32%	30%	33%
Tulsa area	22%	25%	25%	Tulsa area	23%	22%	28%	Tulsa area	21%	29%	23%
Norman	7%	7%	6%	Stillwater	7%	2%	6%	Norman	8%	7%	6%
Stillwater	5%	2%	5%	Norman	6%	7%	6%	Lawton	4%	3%	5%
Lawton	5%	3%	4%	Bartlesville	2%	1%	4%	Ardmore	4%	5%	5%
Ardmore	4%	3%	4%	Muskogee	4%	6%	4%	Muskogee	4%	2%	4%
Muskogee	4%	4%	4%	Ardmore	3%	2%	3%	Stillwater	3%	2%	4%
Bartlesville	3%	1%	3%	Lawton	6%	3%	3%	Bartlesville	4%	2%	3%

Note: Respondents may select more than one destination (percentages may sum to more than 100%)
 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)

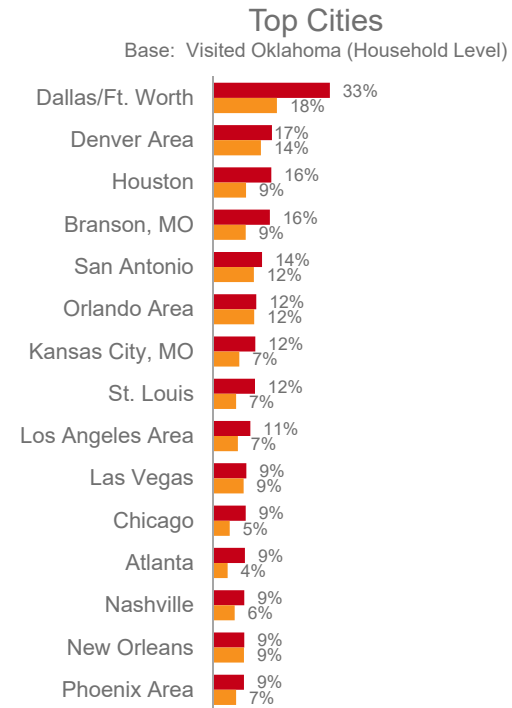
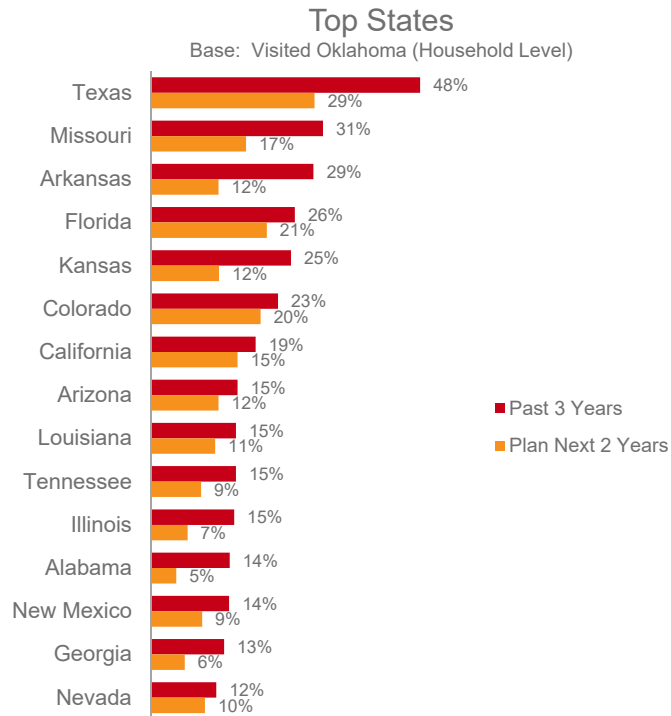
OK Visitors	CY 2017	KS Visitors	CY 2017	TX Visitors (3%+)	CY 2017	AR Visitors	CY 2017	MO Visitors (3%+)	CY 2017
Oklahoma City area	35%	Kansas City Area	31%	Dallas area	22%	Little Rock	27%	St. Louis Area	27%
Tulsa area	25%	Wichita	20%	Houston area	17%	Fayetteville	17%	Kansas City MO Area	19%
Norman	6%	Topeka	11%	Austin area	15%	Hot Springs	15%	Branson	16%
Stillwater	5%	Salina	8%	San Antonio area	13%	Fort Smith	12%	Springfield	11%
Lawton	4%	Lawrence	7%	Fort Worth area	7%	Eureka Springs	10%	Columbia	6%
Ardmore	4%	Manhattan	6%	Galveston	4%	Texarkana	6%	Lake of the Ozarks Area	6%
Muskogee	4%	Hutchinson	5%	Waco	4%	Pine Bluff	5%	Jefferson City	4%
Bartlesville	3%	Abilene	4%	Corpus Christi	3%			Joplin/Carthage	3%
		Dodge City	3%	Lubbock	3%			St. Charles	3%
		Emporia	3%	El Paso	3%			St. Joseph	3%
				Amarillo	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 competitive states (past visits) border Oklahoma; although Florida remains an important regional competitor.
- Texas takes the top spot for past visits and future intent.

Other Areas Visited by Oklahoma Visitors (Key Competitors) % Visiting State/DMA Past Three Years (Ranking), Planned Next Two Years



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

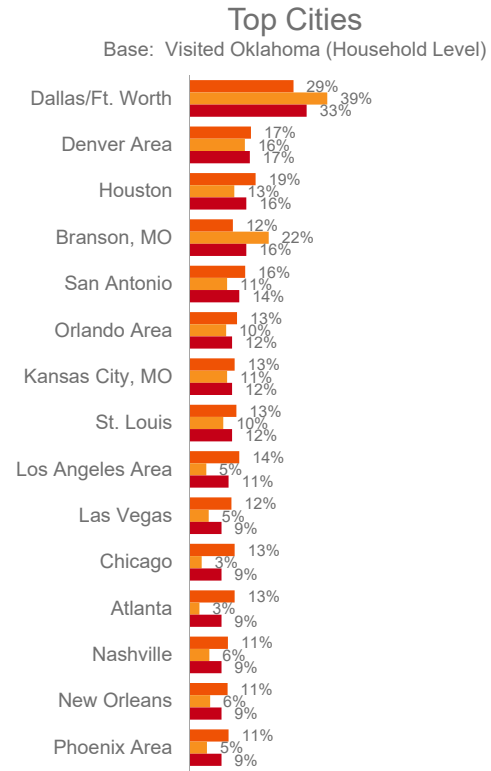
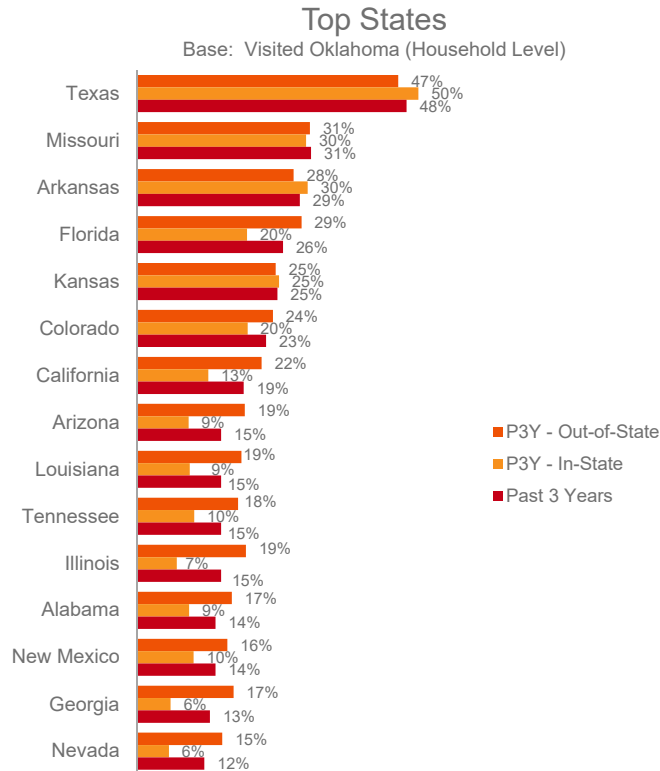
Q7c: US states plan to visit next two years. (Household Level)

Q8a: US cities visited past three years.

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

Out-of-staters visit a broader and more distant variety of destinations

Other Areas Visited by Oklahoma Visitors in Past 3 Years (Key Competitors) Ranked by Past Three Years Total



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

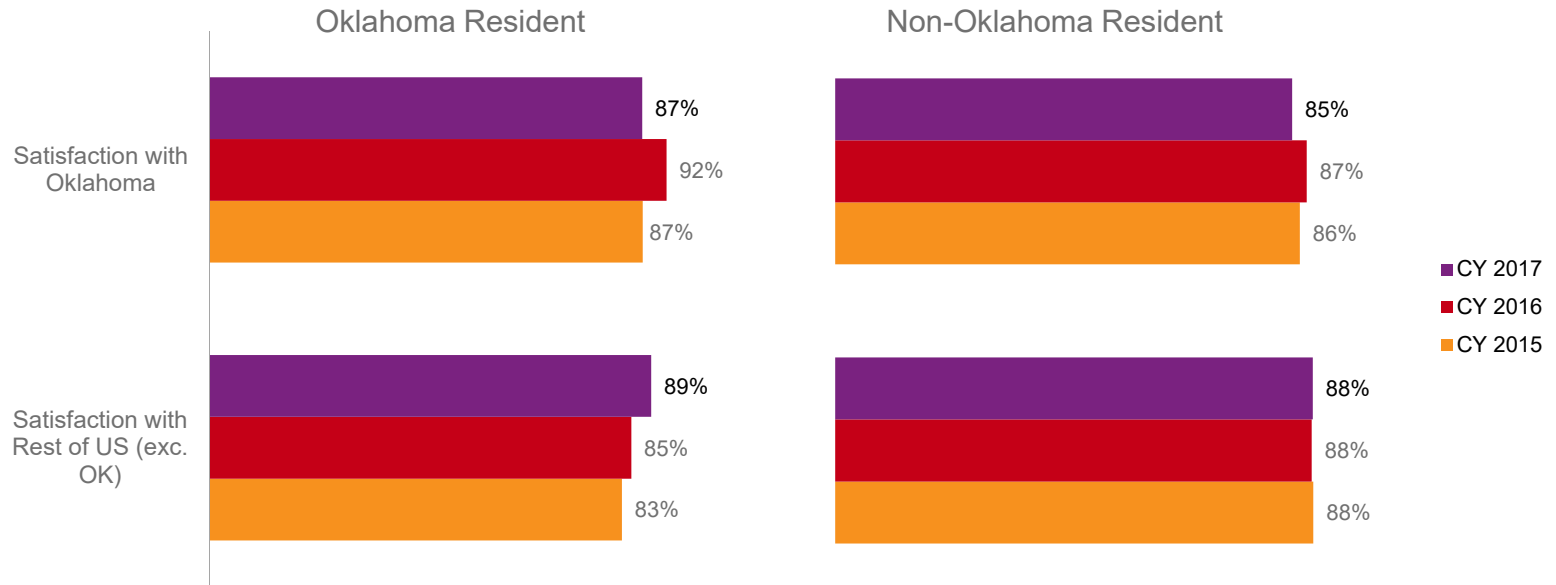
Q8a: US cities visited past three years.

9 Satisfaction



Although satisfaction slipped somewhat, OK visitors usually go home satisfied

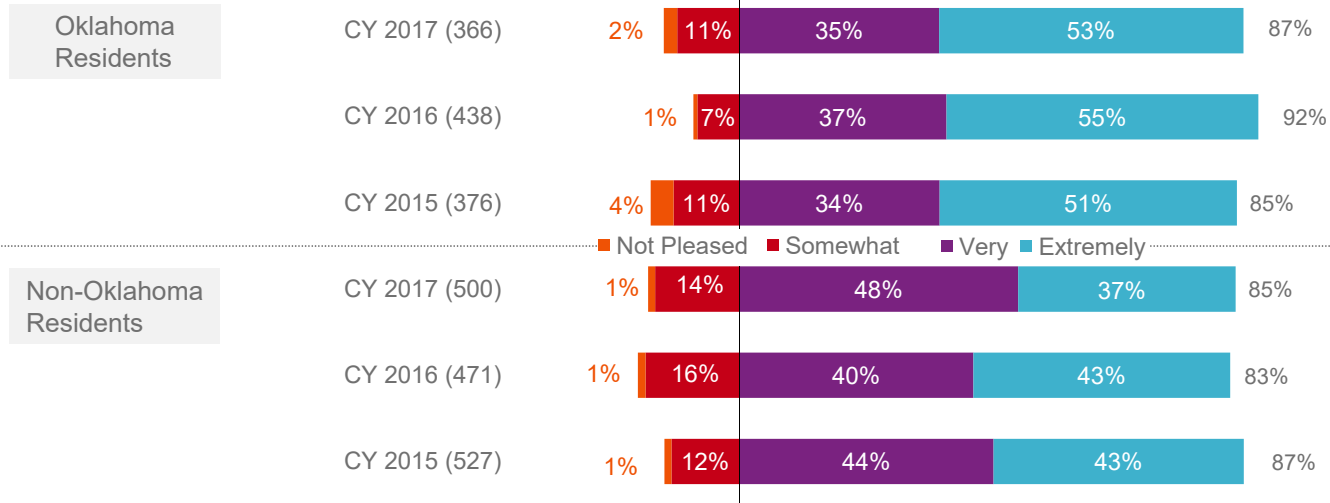
Extremely/Very Satisfied With Trip to State or Rest of US



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 stable from the prior year, with a dip in resident satisfaction offsetting gains among non-residents

Satisfaction with Oklahoma Visit
By Group (Base)

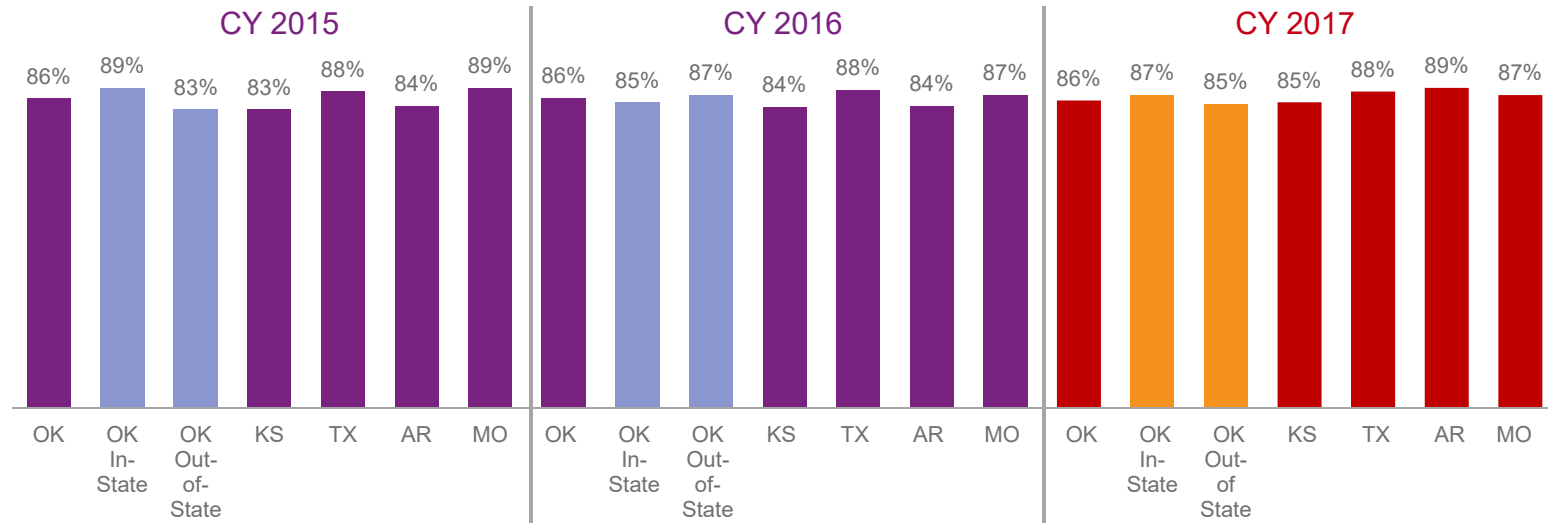


*Note: Not pleased includes *Not At All* and *Not Very Pleased*
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Oklahoma. (State Level-demo wtd.)

Oklahoma satisfies its visitors; similar to KS and TX and slightly below AR

- While Oklahoma maintained its level of visitor satisfaction, other states have either maintained or improved.

Satisfaction: Extremely/Very Satisfied with Visit to State



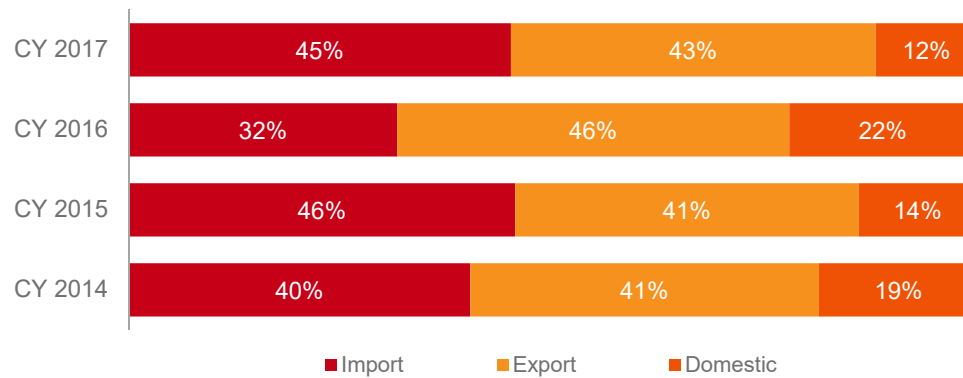
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with ... (State Level-demo wtd.)

10
Export/Import



Oklahoma's Exports/Domestic spending slightly outpaces Import spending

- Import spending (OK residents spending outside of the state) rose this year, slightly outpacing export (Out-of-state visitors) spending.
- Changes in spending can be attributed to increases in import spending and lower numbers of In-State travelers.



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
Demographics



Oklahoma visitors resemble Overall US travelers, except for somewhat lower incomes

- Separately, in-state visitors are more likely to be younger, have larger households, and earn lower incomes compared to those originating from out-of-state.

Demographics	All US Travelers 2016	All US Travelers 2017	Oklahoma Visitors Total 2016	Oklahoma Visitors Total 2017	Oklahoma In-State Visitors CY 2016	Oklahoma In-State Visitors CY 2017	Oklahoma Out-of-State Visitors CY 2016	Oklahoma Out-of-State Visitors CY 2017
Average Age	46	46	47	48	45	44	48	49
Average Household Income	\$80,600	\$88,900	\$73,500	\$75,200	\$60,400	\$60,600	\$83,700	\$84,100
% Male	31%	44%	28%	42%	26%	43%	29%	41%
% Married	60%	62%	64%	64%	60%	63%	66%	65%
Household Composition								
% One Person	16%	14%	15%	16%	17%	19%	13%	15%
% Two People	38%	40%	39%	45%	34%	37%	43%	49%
% Three or More	46%	45%	47%	39%	49%	44%	45%	36%
Ethnicity								
% Caucasian	84%	86%	89%	84%	87%	83%	90%	84%
% African-American	7%	5%	3%	4%	2%	2%	4%	5%

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

Oklahoma overnight visitors report greater affluence and live in smaller households compared to day-trippers

- Oklahoma business travelers tend to be younger, more affluent, and more likely to live in single households compared to leisure visitors.

Demographics	Oklahoma Visitors Total 2017	Oklahoma Leisure Visitors	Oklahoma Business Visitors	Oklahoma Day-Trippers	Oklahoma Overnight (O/N) Visitors
Average Age	48	49	40	46	48
Average Household Income	\$75,200	\$77,500	\$87,300	\$60,700	\$82,900
% Male	42%	42%	37%	41%	42%
% Married	64%	65%	60%	65%	64%
Household Composition					
% One Person	16%	15%	21%	11%	19%
% Two People	45%	47%	40%	40%	47%
% Three or More	39%	38%	39%	49%	34%
Ethnicity					
% Caucasian	84%	85%	79%	83%	84%
% African-American	4%	4%	5%	3%	4%

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

Visitors to Oklahoma and key competitors share similar demographic profiles

- Oklahoma and Missouri rely the most on out-of-state visitors
- OK travelers also tend to earn lower wages.
- Texas relies most heavily on in-state travelers and has greater ethnic variety.

Demographics	Oklahoma Visitors CY 2017	Kansas Visitors CY 2017	Texas Visitors CY 2017	Arkansas Visitors CY 2017	Missouri Visitors CY 2017
Average Age	48	46	45	47	49
Average Household Income	\$75,200	\$81,700	\$83,500	\$77,100	\$82,700
% Male	42%	47%	42%	45%	44%
% Married	64%	66%	62%	68%	69%
% In-State Visitor	38%	44%	68%	40%	34%
Household Composition					
% One Person	16%	17%	15%	14%	13%
% Two People	45%	35%	38%	37%	42%
% Three or More	39%	48%	47%	49%	45%
Ethnicity					
% Caucasian	84%	94%	84%	89%	93%
% African-American	4%	2%	7%	8%	3%
% Hispanic Origin	5%	4%	13%	6%	3%
Total Households (Census)	1,461,500	1,115,858	9,289,554	1,141,480	2,372,362

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

Census: <http://quickfacts.census.gov>

12
Glossary and Research Methods



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)
Domestic	Money remaining in state (Oklahoma residents vacationing inside their home state of 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 2017.

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 glide/skydive/base jump, hike/backpack/canyoneer, 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, 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, visit friends, visit relatives
Sightsee	Rural sightsee, urban sightsee, see area where a TV show or movie was filmed
Parks and Gardens	Gardens, state parks/monuments/recreation areas, National parks/monuments/recreation areas

Research methods

DATA COLLECTION PROCESS

- OmniTrak Group uses its US panel to manage sample for TravelTrakAmerica
- Monthly e-mail invitations are sent to representative households; quotas are set for age, income, and region
- Usually starting in the middle of the first week of a month, the field period runs two to three weeks
- Final data are weighted as follows:
 - Demographic combinations of region, state, age, and income to reflect the current 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, 2017

CY 2016 Travelers (Unweighted Respondents)	CY 2017 Travelers (Unweighted Respondents)	CY 2016 Travelers (Weighted by Demographics)	CY 2017 Travelers (Weighted by Demographics)	Region
1,504	1,414	1,235	1,263	Oklahoma Residents
1,027	702	972	652	Oklahoma Visitors (Trips)
57,930	43,628	58,792	41,763	Total for TravelsAmerica

Thank you

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