

Oklahoma Tourism Segmentation

November 9, 2006



Background and Objectives

Objectives

In an effort to better understand the consumer marketplace and create more actionable marketing communications, The Oklahoma Tourism and Recreation Department and Ackerman McQueen partnered with TNS to implement a consumer segmentation. The results from this study are discussed in this presentation.

Methodology

A mail survey was conducted among the TNS mail managed access panel. Consumers were recruited differentially based on where in the U.S. they lived: 60% of the sample was recruited from neighboring states around Oklahoma and 40% were recruited from outside of this area.

1,200 surveys were returned; half were primary vacation decision makers. The following table indicates the breakdown by geographic region:

%	
11.8	Oklahoma
16.7	Texas
14.1	Kansas
9.6	Missouri
10.2	Arkansas
20.1	Other Visiting Cities (Chicago, Minneapolis, Denver, Phoenix, Los Angeles, San Francisco and Indianapolis)
17.6	Other U.S.
100.0	Total

The study was fielded during the month of August, 2006.

Analytic Notes

Multi-Domain Segmentation

- A holistic approach designed to:
 - Ensure that attitudes, behaviors, and demographics all drive segmentation.
 - Produce segments of consumers that are guaranteed to be as attitudinally, behaviorally, and demographically distinct as possible.

Multi-Domain Segmentation both locates segments and ensures these segments are distinct in ways that have meaning for marketing and product development. *Note. The appendix contains more information on the approach.*

TNS worked with Ackerman McQueen and OTRD to select a segmentation scheme that met the priorities of the current initiative.

Indexing Indicators

Throughout the presentation, key segment skews are indicated by grey squares and orange circles. These indicate:

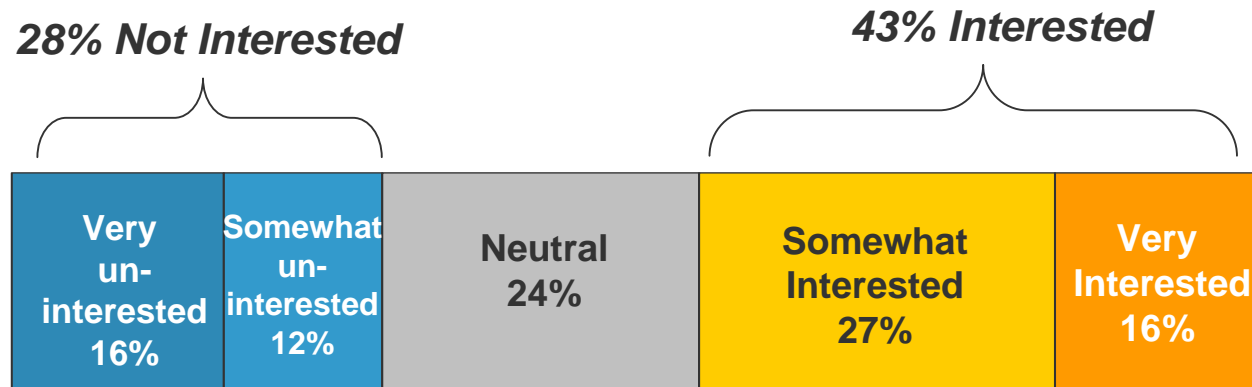
A score 80% of Total Sample 

A score above 120% of Total Sample 

Note. Only key, notable differences will be highlighted.

Brief Overview of the Tourist Marketplace

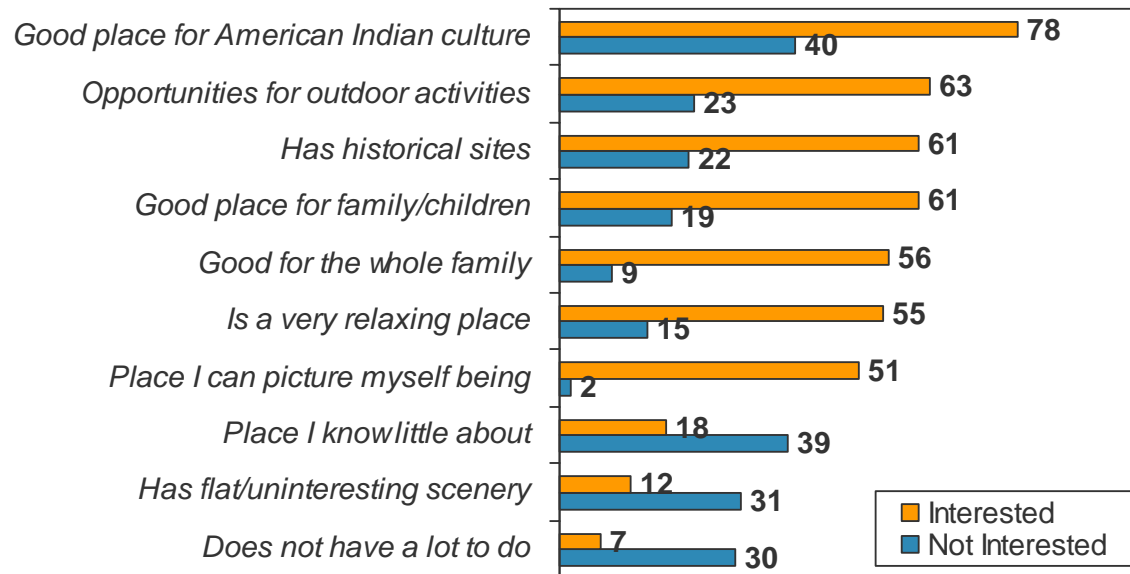
Interest in Oklahoma as a Tourist Destination



Q: Please indicate your level of interest in visiting the state of Oklahoma.

Interest in Oklahoma as a Tourist Destination

Perceptions of Oklahoma (% Top 3 Box Applies)

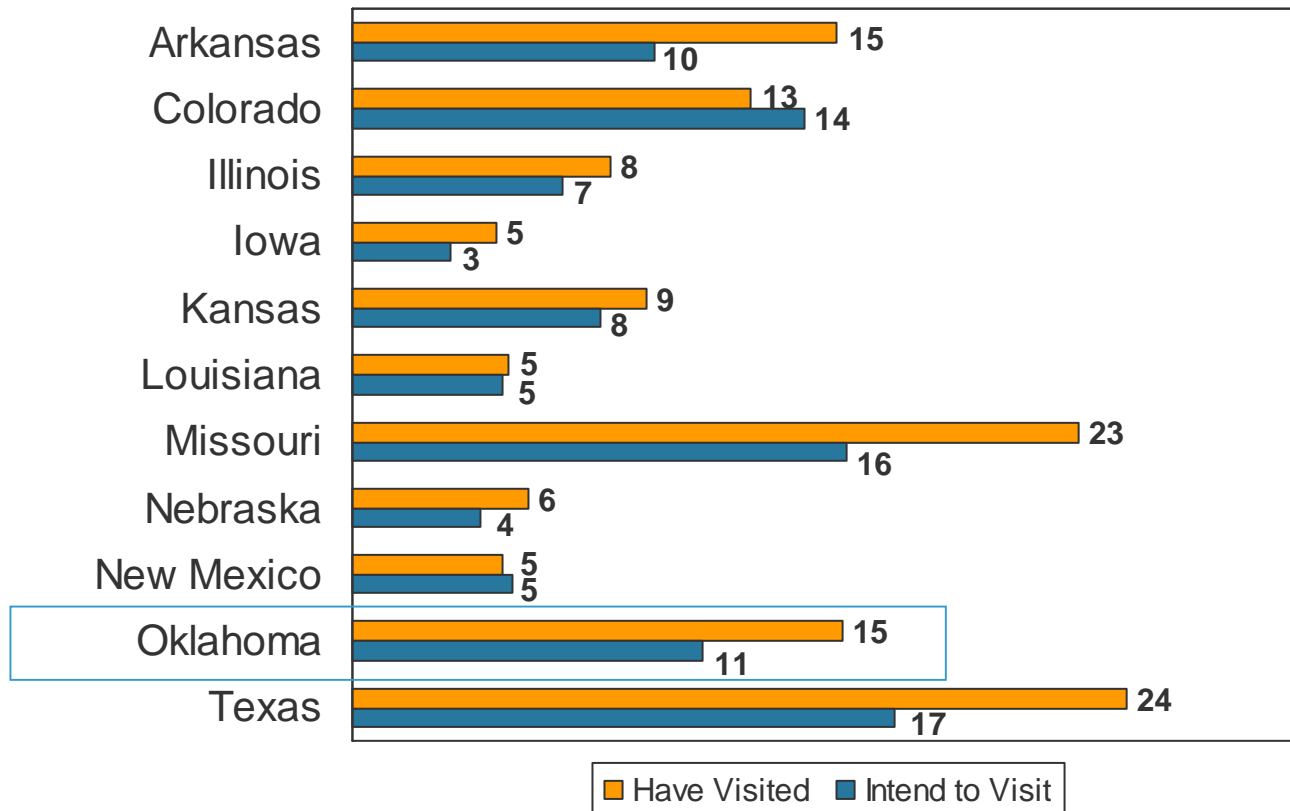


- Consumers who are interested in OK travel are interested in the outdoors, historical sites, and feel it is a good place for family.
- Those who are uninterested think that there is little to do in OK...*but admittedly, they don't know much about the state.*

Q: Please indicate the degree to which you feel each statement applies to Oklahoma....

Where Have They Been or Do They Intend to Go?

- Texas and Missouri are the states most visited; they'd also like to go to Colorado.
- Oklahoma and Arkansas fall into the next tier.

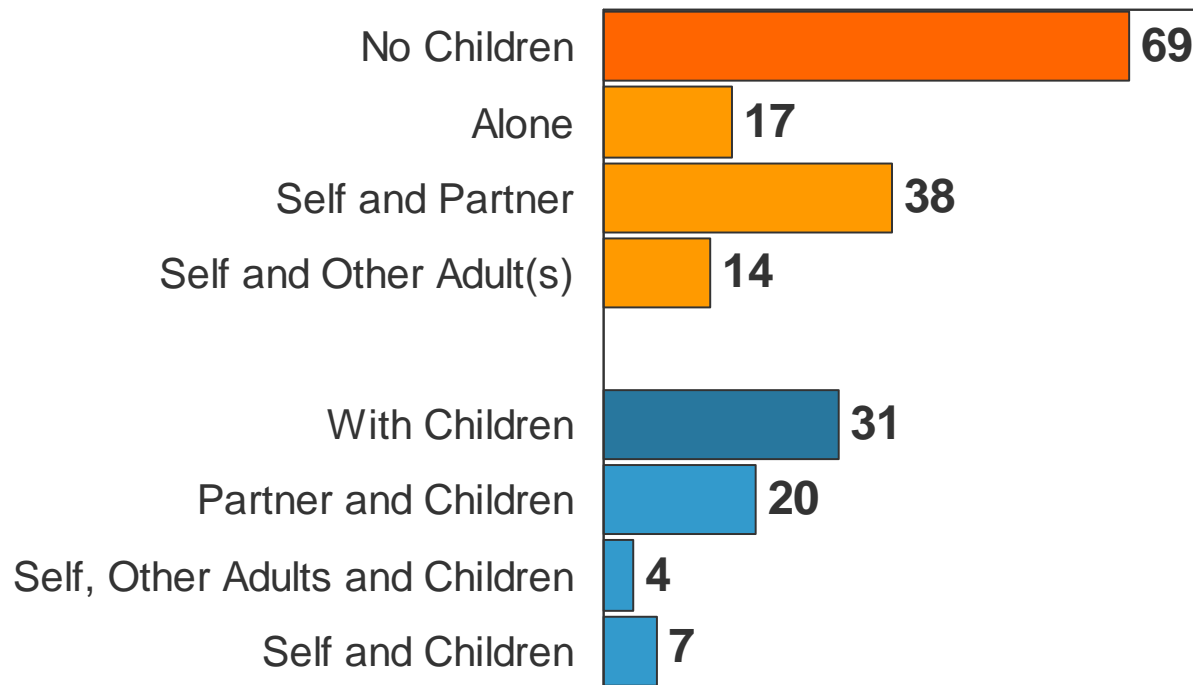


Q: Check if you have visited the state for leisure in the past 12 months, Check if you intend to visit the state in the next 12 months.

Who Goes Along on Trips?

- The majority (2/3) of consumers travel without children, and most of those travel with a partner or other adult.

Share of Past Year's Leisure Trips by Who Accompanied (%)

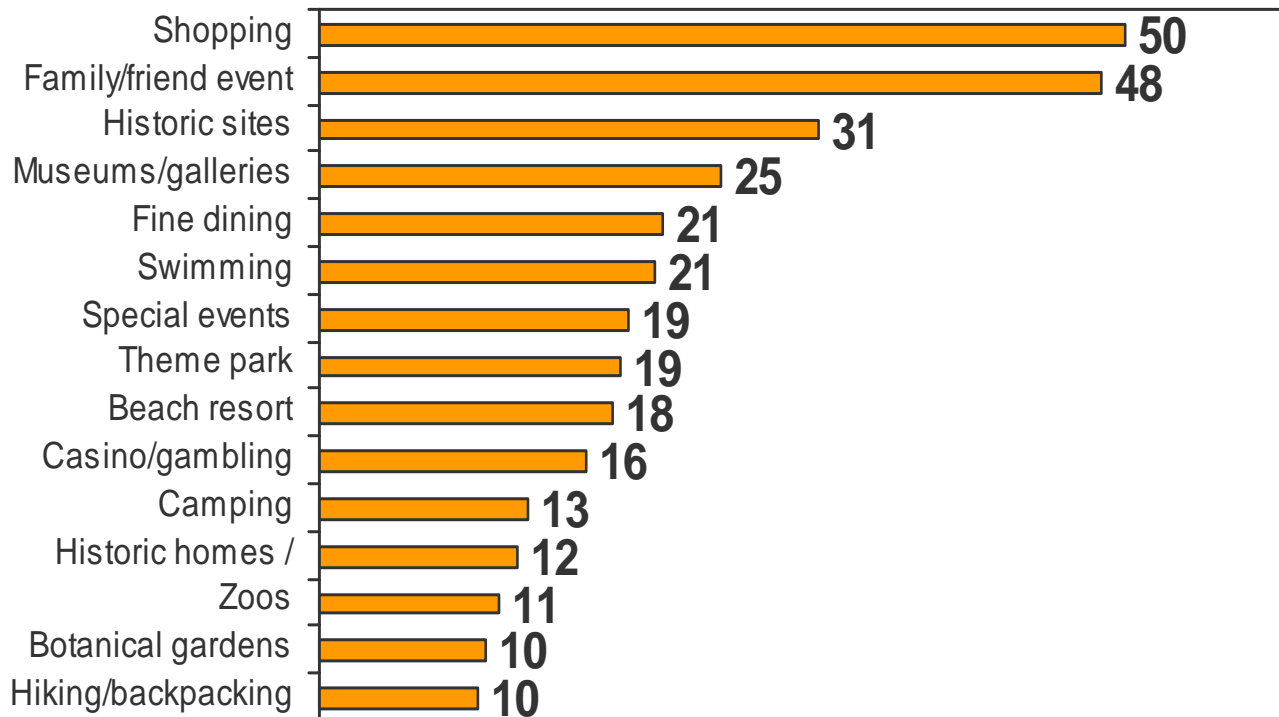


Q: For each of the following, please tell us how many leisure trips of each you took in the past 12 months.

Total Sample: What Do They Do?

- Shopping and visiting with family or friends are the most frequent activities on vacation.

Top 15 Activities Enjoyed on Leisure Trips (%)

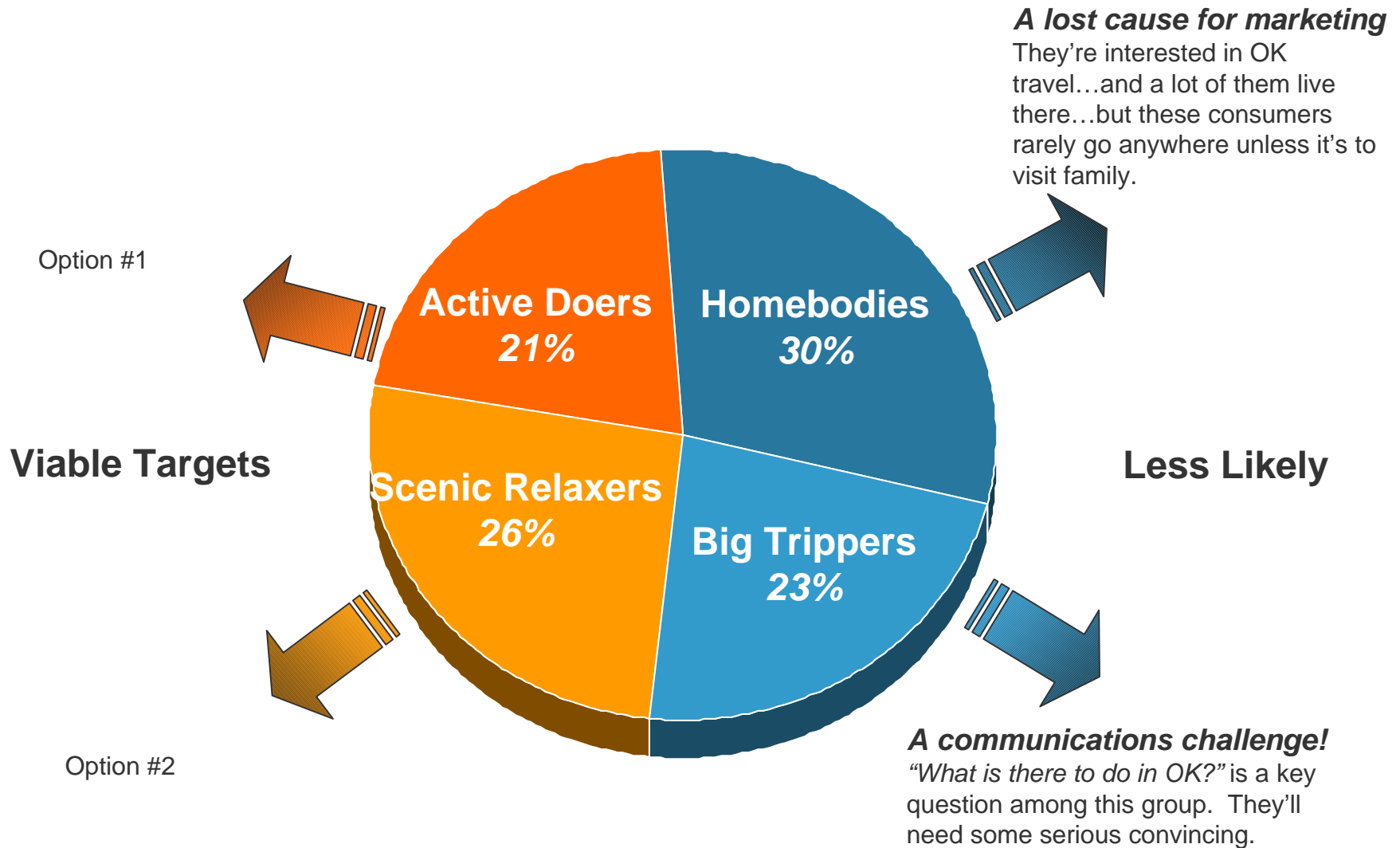


Q: Please check off all the activities you did/visited on your leisure vacation trip(s) in the last 12 months.

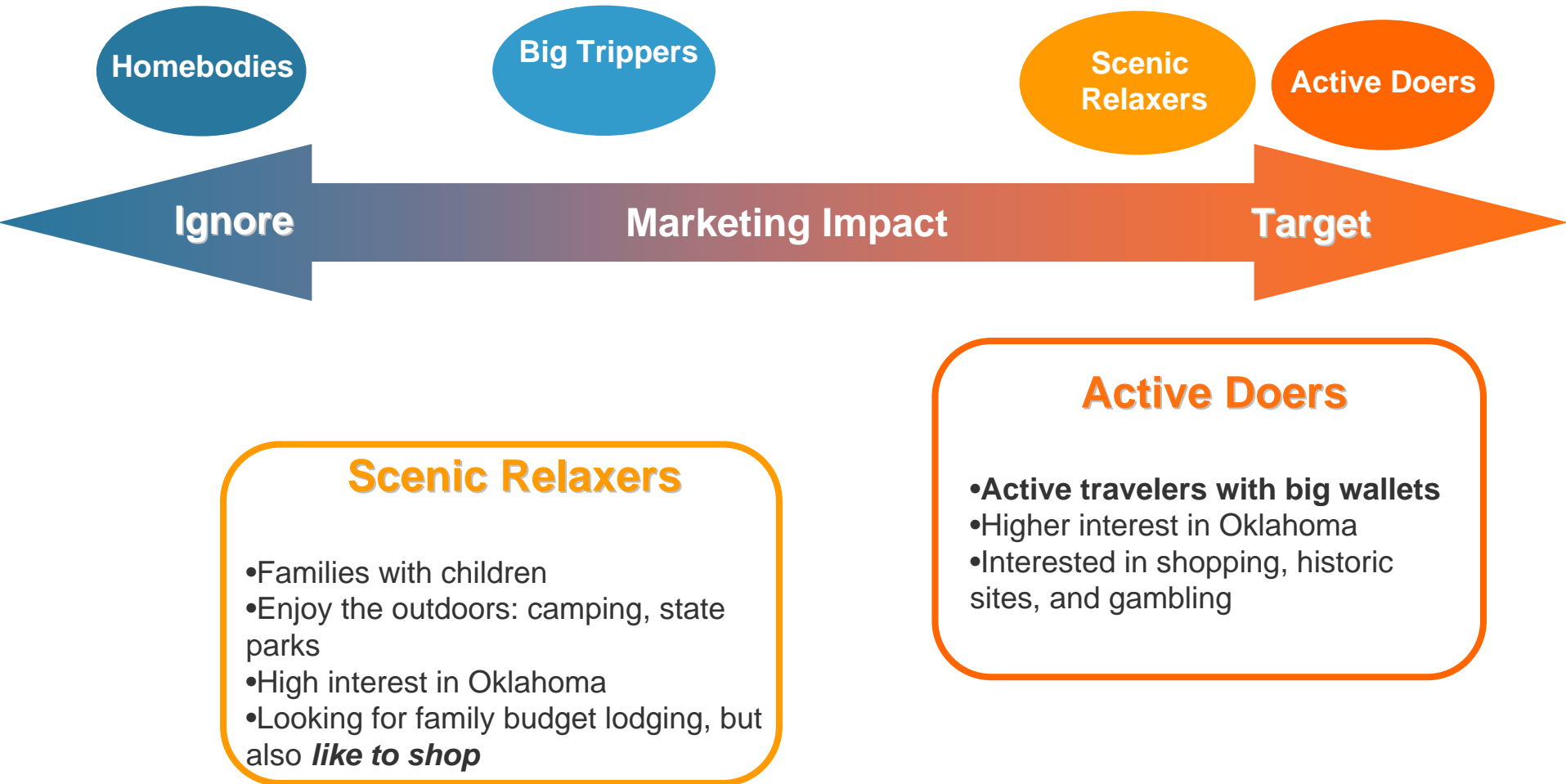
Oklahoma Tourism Consumer Segments *Overview*



Introducing the Four Consumer Segments



Appeal of Segments for Oklahoma Tourism Marketing



Appeal of Segments for Oklahoma Tourism Marketing



Homebodies

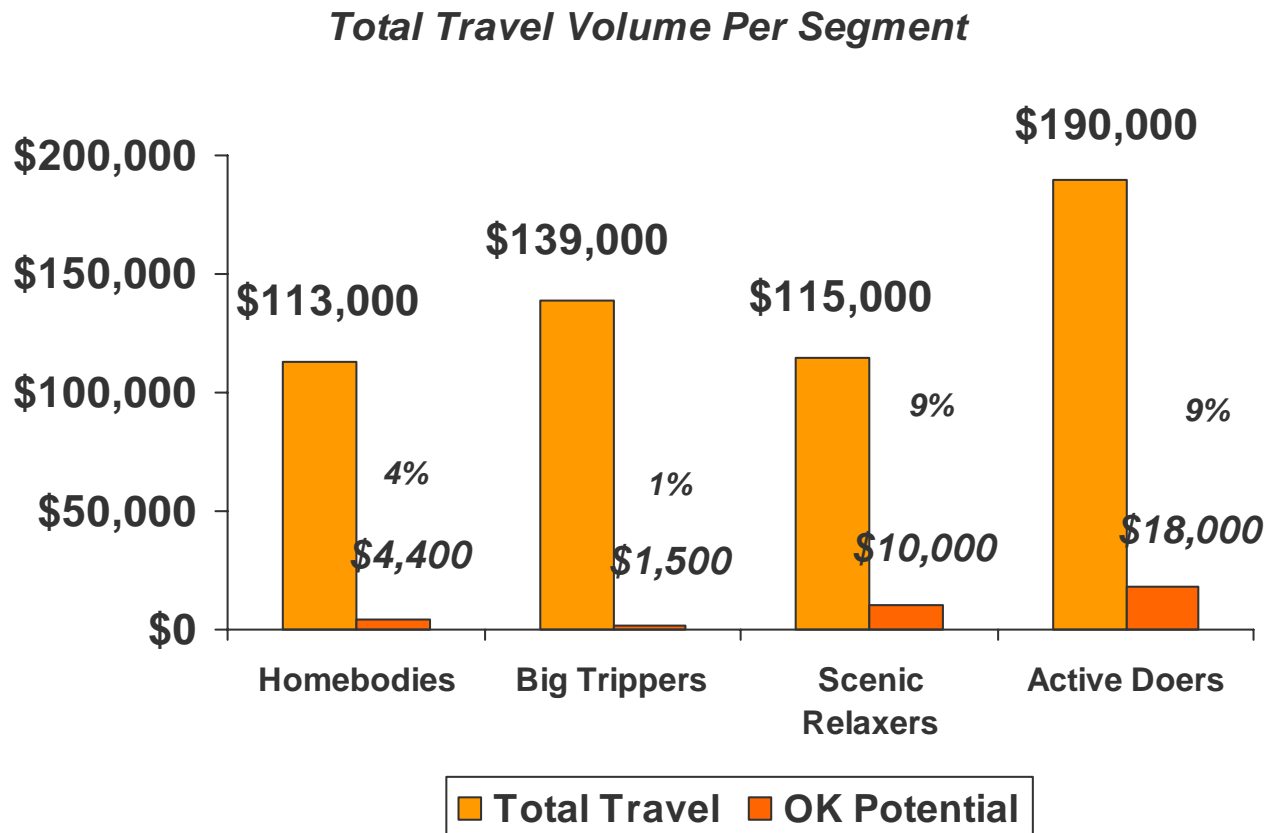
- Lower income families who travel mostly to visit family
- Aspire to travel, but do so infrequently
- Oklahoma and Texas residents are well-represented in this segment

Big Trippers

- Well educated, high income couples
- Live in urban areas outside of the OK geographic region.
- Very low interest in Oklahoma
- Take a couple of BIG trips per year
- Not as interested in the outdoors

Segments' Tourism Revenue Potential

- Of the two potential best targets, Active Doers represent the most potential tourism revenue for the state.



Total Volume = Number of Past 12 Mos. Leisure Trips X Average Amount Spent on Short & Long Leisure Trips summed across respondents in the segment.

OK potential Volume = Number of Intended Trips to OK in Next Year X Average Amount Spent on Short & Long Leisure Trips summed across respondents in the segment.

Travel Frequency and Spend

•Of the two targets, Active Doers are the biggest spenders and have the highest intent to visit.

•Scenic Relaxers show high intent, but lower potential revenue.

	Homebodies	Big Trippers	Scenic Relaxers	Active Doers
Travel Spend (average)				
Short Leisure Trip	\$403	\$541	\$390	\$592
Long Leisure Trip	\$1,131	\$1,728	\$1,149	\$1,785
Number of Past Year Lesiure Trips (average)	2.3	3.2	2.8	4.6
Intend to Travel to OK (%)	9	3	14	18
Number of Intended Trips to OK (average)	2.1	1	2.1	3.9
Total Travel Volume for Segment	\$113,000	\$139,000	\$115,000	\$190,000

Q: Please indicate the average total dollar amount spent by your household / number of trips taken for leisure / intent to visit / in the past / next 12 months for each state you have visited.

Average Leisure Spending in Oklahoma

Total	\$306
Active Doers	\$442
Homebodies	\$202
Big Trippers	\$213
Scenic Relaxers	\$289

**Mean amount per HH Visit

Q: Please indicate the total amount spent by your household in the past 12 months for the state of Oklahoma.

Key Findings: Overall

- Based on this research there are two viable targets for the state.
- Active Doers are the Spring target; Scenic Relaxers are the Fall target.

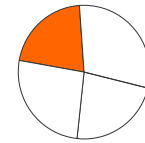
PRIMARY TARGET

Active Doers

Detailed Findings

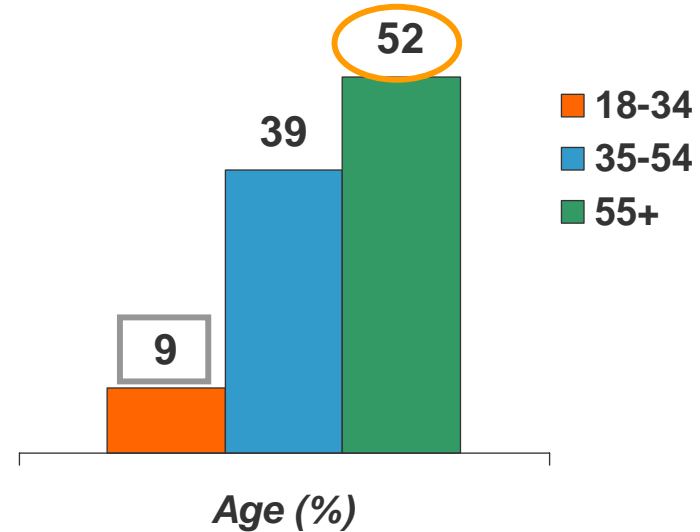


Demographic Snapshot

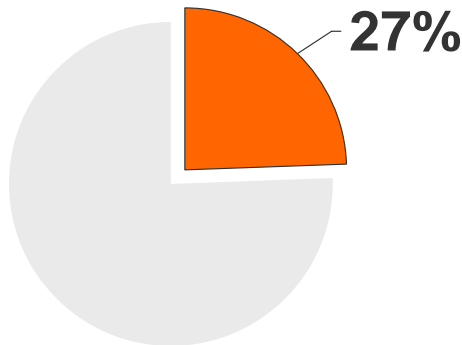


Active Doers
21%

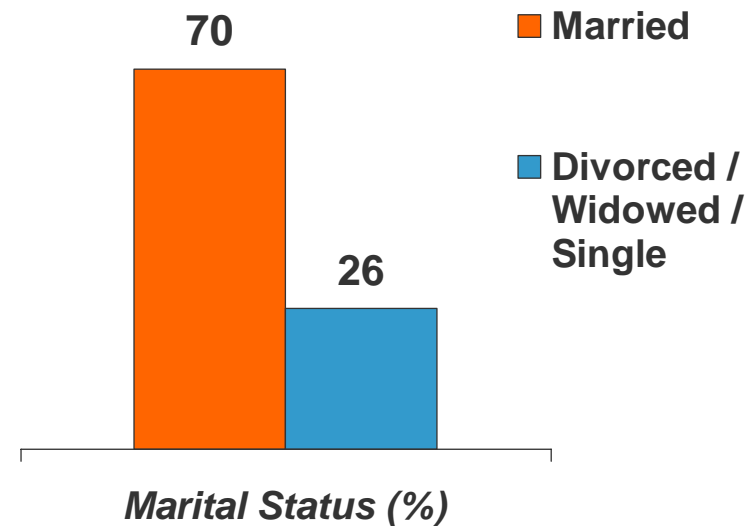
- Active Doers are more apt to be 55+. In contrast, 39% of Big Trippers, 47% of Homebodies and just 28% of Scenic Relaxers fall in that age group.
- About 1/3 of them have children in the household (similar to Big Trippers and Homebodies; 26% / 25%, but well below Scenic Relaxers at 45%.)
- Implication: Consider revolving media targeted to 35 – 64.



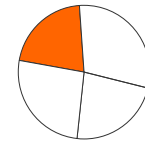
Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.



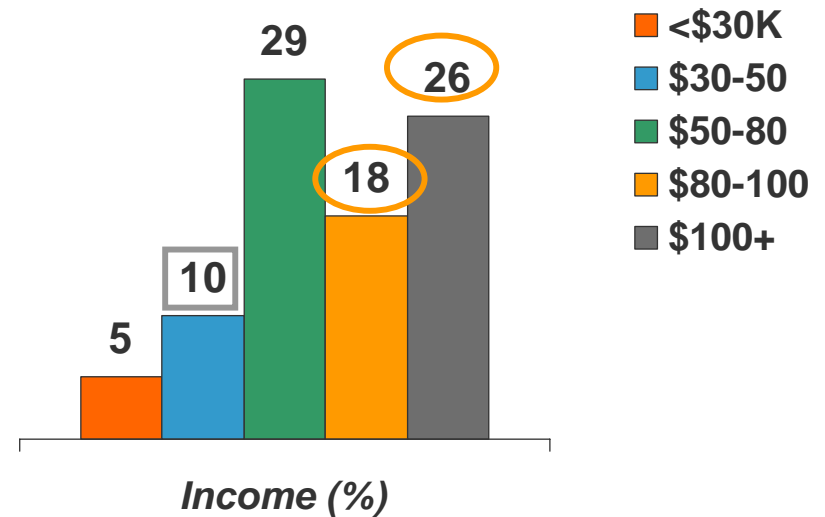
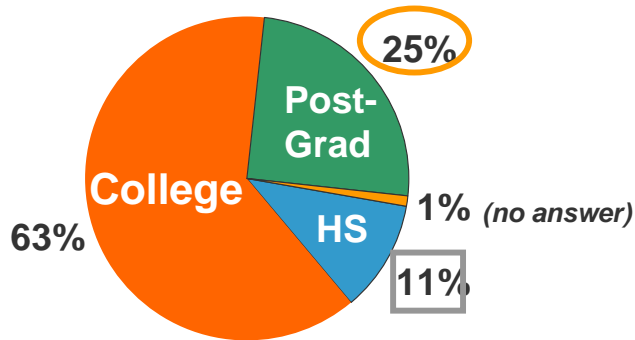
Socio-Economic Snapshot



Active Doers
21%

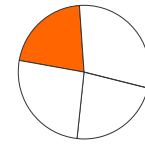
- Active Doers are among the most educated and the most wealthy of segments.
- 26% have \$100K+ incomes – higher even than Big Trippers (17%) and well above Scenic Relaxers (11%) and Homebodies (7%).
- Big Trippers tie with Active Doers on post-grad degrees (24% vs 25%).
- In contrast, Homebodies and Scenic Relaxers are more likely to be High School graduates (24% / 31%) or have some college (38% / 32%)

Highest Level of Education



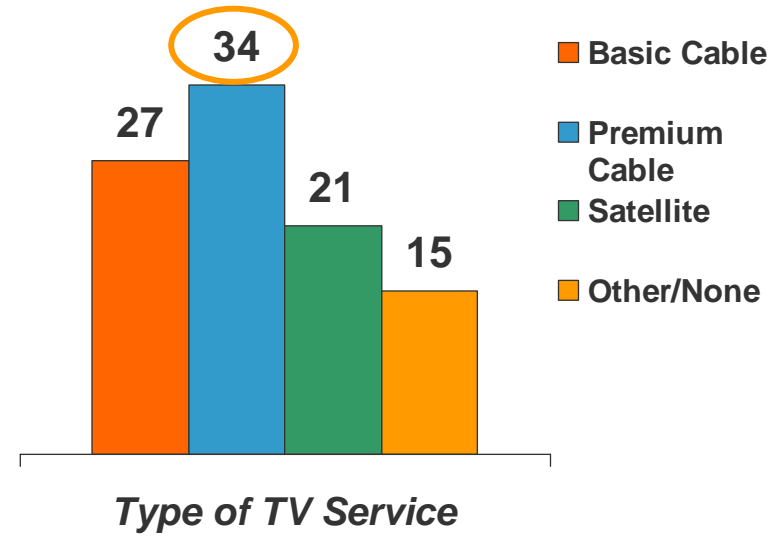
Q: Which of the following best describes the last level of school that you completed / your total household income?

Techno-graphic Snapshot

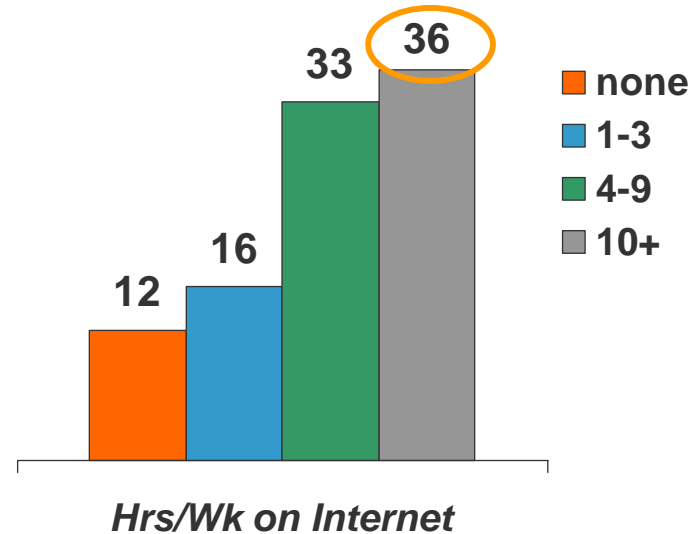
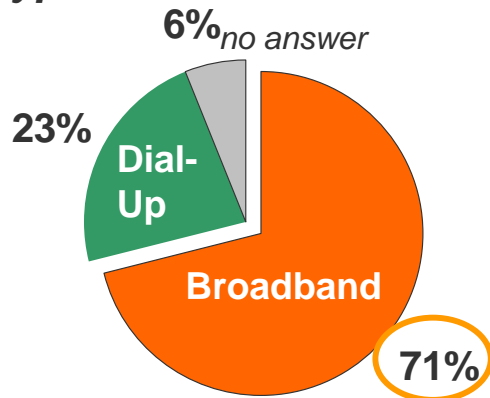


Active Doers
21%

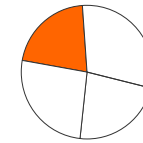
- Active Doers spend a LOT of time on the Internet...perhaps a great way to reach them...and they have broadband to boot.
- Active Doers are the most likely to subscribe to premium cable TV.



Type of Internet Service

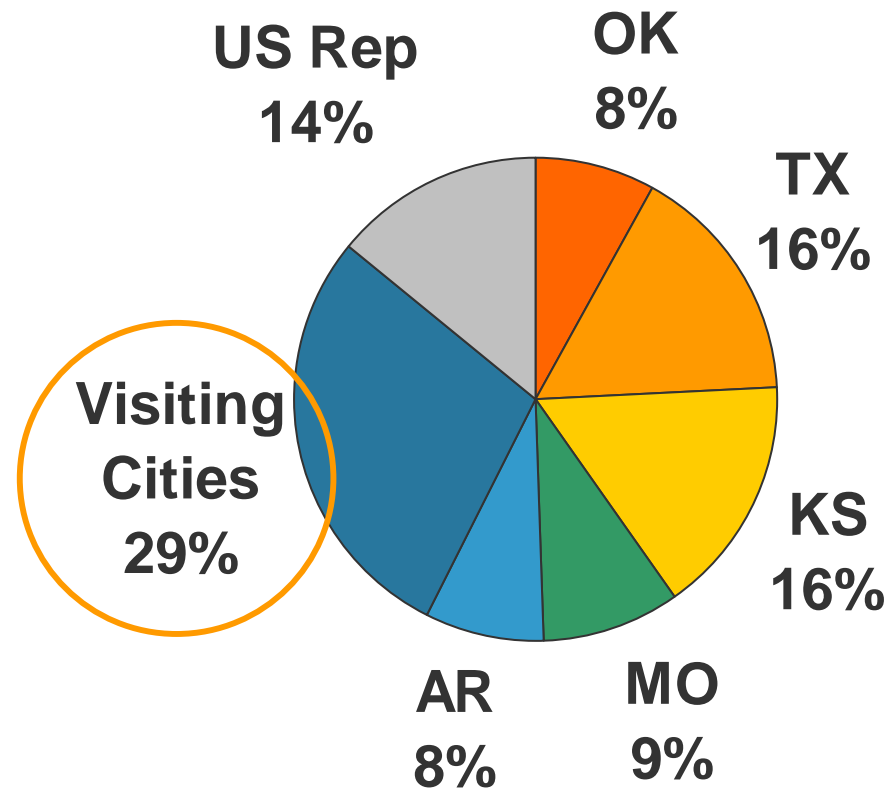


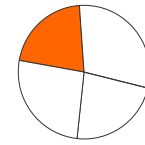
Geographic Composition



Active Doers
21%

- Close to 60% come from Texas, Oklahoma and surrounding states (with Kansas outperforming Missouri).
- Almost one-third come from other “visiting cities.”

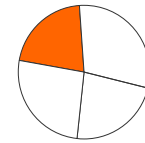




Active Doers
21%

Travel Attitudes and Habits

Travel Attitudes



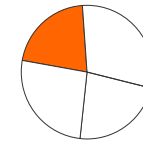
Active Doers
21%

- These are travel enthusiasts who love to explore and discover.

	Top 2 Box	
	Total	Active Doers
I love to travel	36%	50%
A vacation is a time to see new places / new experiences	36%	49%
I really like to explore new places	26%	33%
Travel is a very important part of my life	20%	31%
I consider travel to be one of my hobbies	19%	30%
I like to go to places off the beaten path	18%	26%

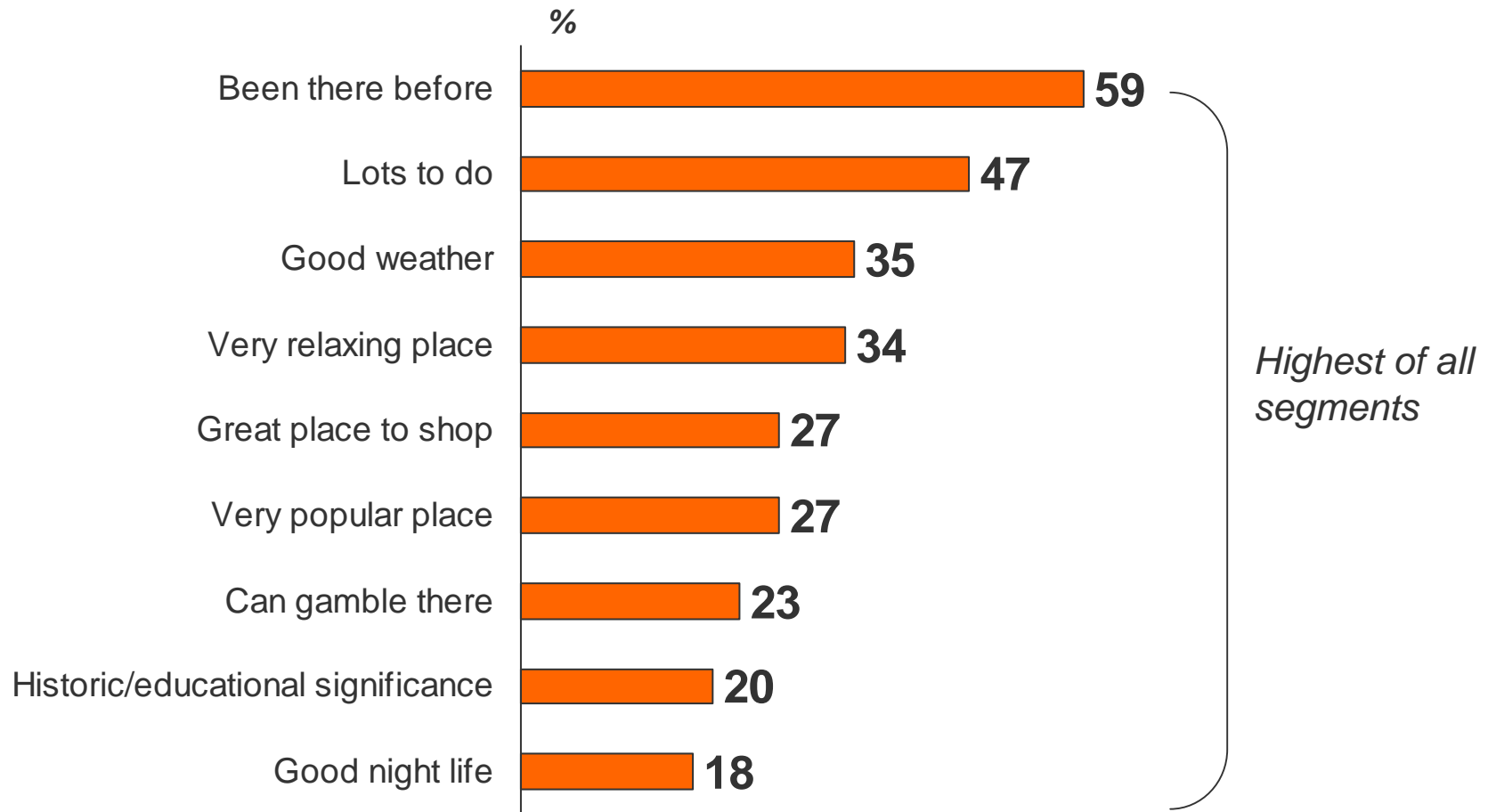
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.

Motivations for Most Recent Leisure Trip

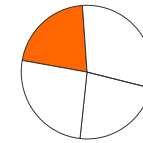


Active Doers
21%

- What do Active Doers look for? Everything!



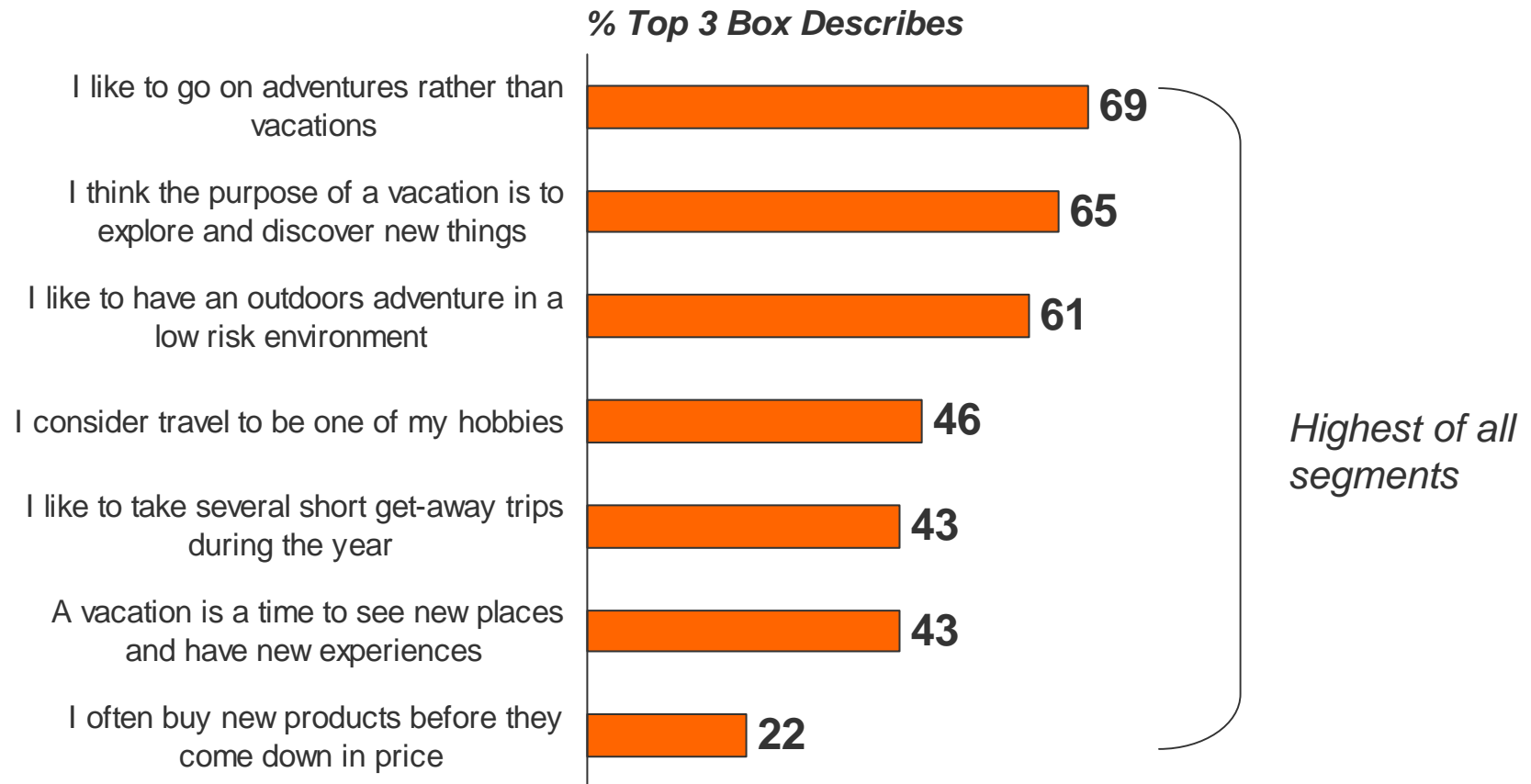
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?



Active Doers
21%

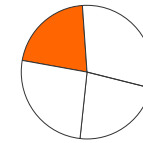
Attitudes about Travel in General

- Active Doers are (low-risk) explorers and adventurers.
- Traveling is a hobby for them and they like to take multiple short trips every year.



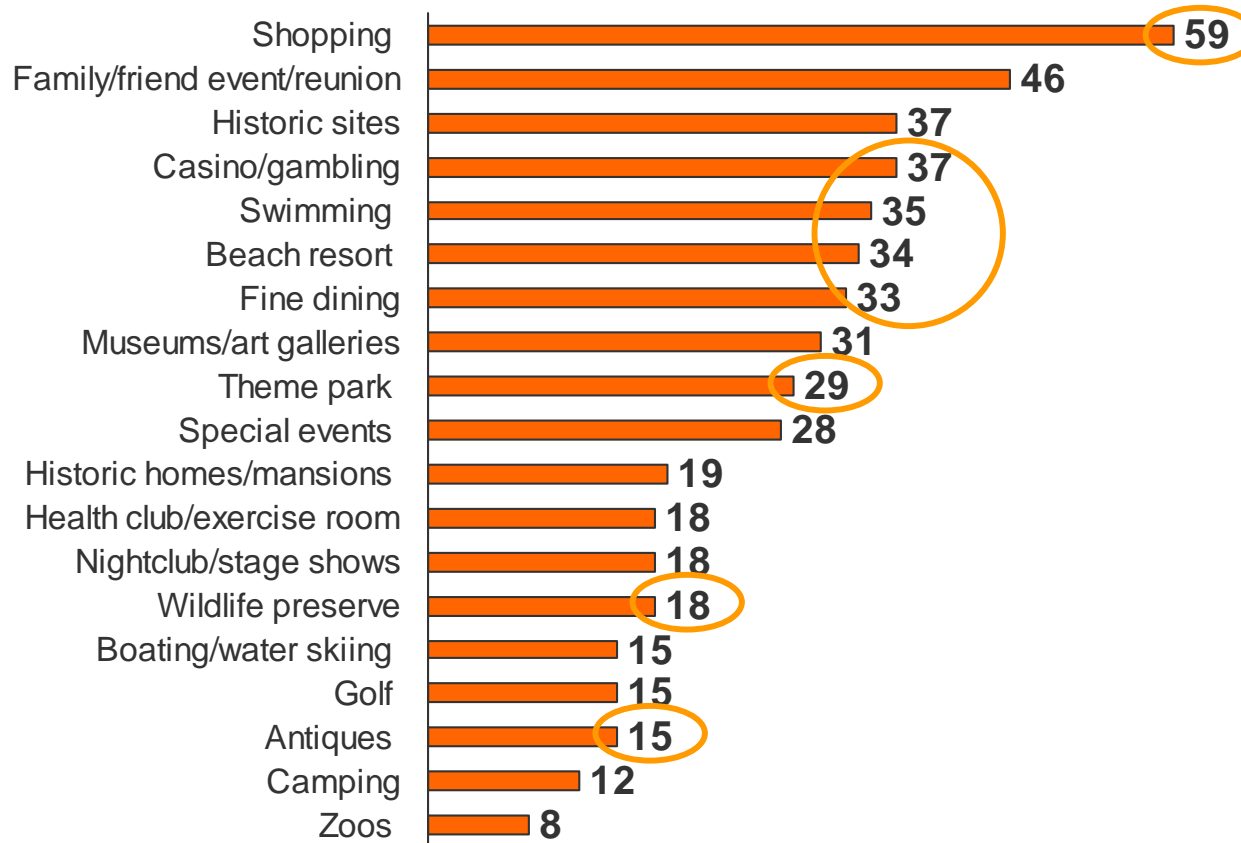
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.

Activities on Most Recent Leisure Trip



Active Doers
21%

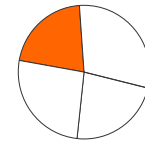
■ What do they DO on vacation? A little bit of everything.



Activities with $\geq 15\%$ mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

Activity Comparison



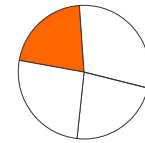
Active Doers
21%

- They do more than any other group. They especially like to go...

	Total	Active Doers
Shopping	50%	59%
Swimming	21%	35%
Historic Sites	31%	37%
Museums / Galleries	25%	31%
Fine Dining	21%	33%
Special Events	19%	28%
Theme Parks	19%	29%
Beach Resort	18%	34%
Casino	16%	37%

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

Activity Comparison

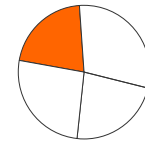


Active Doers
21%

■ They also enjoy...

	Total	Active Doers
Historic Homes	12%	19%
Boating	9%	15%
American Indians	5%	11%
Fresh Water Fishing	8%	14%
Nightclubs	8%	18%
Snorkeling	5%	11%
Golf	5%	15%
Wildlife Preservations	9%	18%
Antiques	9%	15%

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.



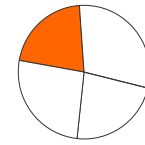
Active Doers
21%

Where have they visited?

- Active Doers are most likely to have visited Texas, Missouri and Oklahoma.
- In contrast, Scenic Relaxers opt for Arkansas (26%).
- Big Trippers index high on NONE of these states – they’re big tripping; same for homebodies who are staying home.

	Leisure		Business	
	Total	Active Doers	Total	Active Doers
Texas	24%	38%	6%	8%
Missouri	23%	26%	3%	6%
Oklahoma	15%	23%	4%	8%
Arkansas	15%	15%	4%	5%
Colorado	13%	19%	3%	5%
Kansas	9%	12%	3%	4%
Illinois	8%	13%	2%	4%

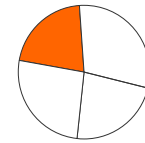
Q: Check if you have visited the state for leisure / business in the past 12 months.



Active Doers
21%

Implication

- We need to continue to market the variety of things to do in Oklahoma: unique shopping (Bricktown / Utica Square), water (swimming, boating, fishing), historic sites (Oklahoma City National Memorial), museums (Philbrook, Gilcrease, Oklahoma City Museum of Art), dining (Bricktown, Tulsa Riverwalk Crossing)...
- And determine the best ways to take advantage of this group's interest in gaming.



How do we best reach Active Doers?

- Active Doers are more likely to watch network TV...

	Total	Active Doers
Network TV	59%	70%
Basic Cable	33%	28%
PBS	10%	5%
Premium Cable (HBO, etc.)	7%	4%

- And they're more likely to own a DVR / TiVo

	Total	Active Doers
Do you own a digital video recorder i.e. TiVo, DVR?	27%	40%

Q: When you watch television do you typically watch...?
Does your HH own a digital video recorder?

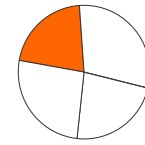
Daypart Breakdown

- What are they watching? Active Doers are more likely to watch early evening programming – probably news.

	Total		Active Doers	
	Weekday	Weekend	Weekday	Weekend
Early Morning (before 9am)	41%	27%	44%	29%
Late Morning (9am – noon)	16%	25%	15%	20%
Early Afternoon (noon – 3pm)	17%	23%	18%	22%
Late Afternoon (3pm – 5pm)	20%	27%	18%	28%
Early Evening (5pm – 8pm)	61%	52%	69%	57%
Primetime (8pm – 11pm)	71%	68%	72%	73%
Late Night (11pm – 1am)	17%	24%	15%	24%

Q: What time(s) of day do you typically watch television on the weekdays?

Daypart Breakdown



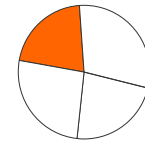
Active Doers
21%

- Compared to other key targets, they're also more apt to watch early morning – again, probably news.

	Active Doers		Homebodies		Big Trippers		Scenic Relaxers	
	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend	Weekday	Weekend
Early Morning (before 9am)	44%	29%	38%	24%	44%	30%	40%	26%
Late Morning (9am – noon)	15%	20%	22%	26%	13%	27%	15%	25%
Early Afternoon (noon – 3pm)	18%	22%	18%	24%	13%	24%	18%	23%
Late Afternoon (3pm – 5pm)	18%	28%	25%	26%	17%	27%	21%	28%
Early Evening (5pm – 8pm)	69%	57%	60%	53%	61%	51%	56%	47%
Primetime (8pm – 11pm)	72%	73%	35%	59%	79%	74%	71%	69%
Late Night (11pm – 1am)	15%	24^	19%	25%	17%	24%	18%	23%

Q: What time(s) of day do you typically watch television on the weekends?

Favorite TV Shows

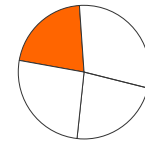


Active Doers
21%

- While answers were scattered and bases are small, Active Doers are twice as likely to watch:
 - 60 Minutes
 - American Idol
 - Antiques Roadshow
 - The Closer
 - Extreme Makeover
 - Crossing Jordan
 - The Office

- And are also above average viewers of:
 - CSI
 - Lost
 - Monk
 - Law & Order
 - Survivor

Q: Which 3 television programs do you watch on a regular basis?

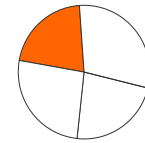


Active Doers
21%

Favorite TV Shows: Other Segments

- In contrast:
 - Scenic Relaxers
 - Amazing Race
 - Big Trippers
 - 24
 - Homebodies
 - 7th Heaven

Q: Which 3 television programs do you watch on a regular basis?



Active Doers
21%

Music Formats on Radio

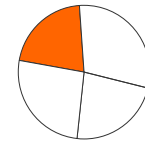
- News and Adult Contemporary is how to reach them. They're also more apt to listen to talk radio and jazz.

	Total	Active Doers
News	26%	28%
Adult Contemporary	17%	26%
Jazz	10%	14%
Talk	15%	21%

- In contrast, Scenic Relaxers like Country (44% Scenic Relaxers vs. 37% Total).
- Big Trippers score higher on Classical (20% vs. 16% Total) and NPR (17% vs. 13% Total).
- There are no real differences for Homebodies.

Q: Which of the following music formats do you usually listen to on the radio?

Magazines



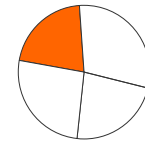
Active Doers
21%

- They were given a list of publications and asked to check their three favorites. They're above average readers of:

	Total	Active Doers
AAA Publications	17%	27%
AARP The Magazine	24%	33%
Better Homes and Gardens	17%	21%
Good Housekeeping	15%	22%
Ladies Home Journal	8%	15%
Midwest Living	6%	3%
Redbook	5%	9%
Southern Living	7%	10%
Travel & Leisure	3%	7%
US News	2%	4%
Vanity Fair	2%	4%

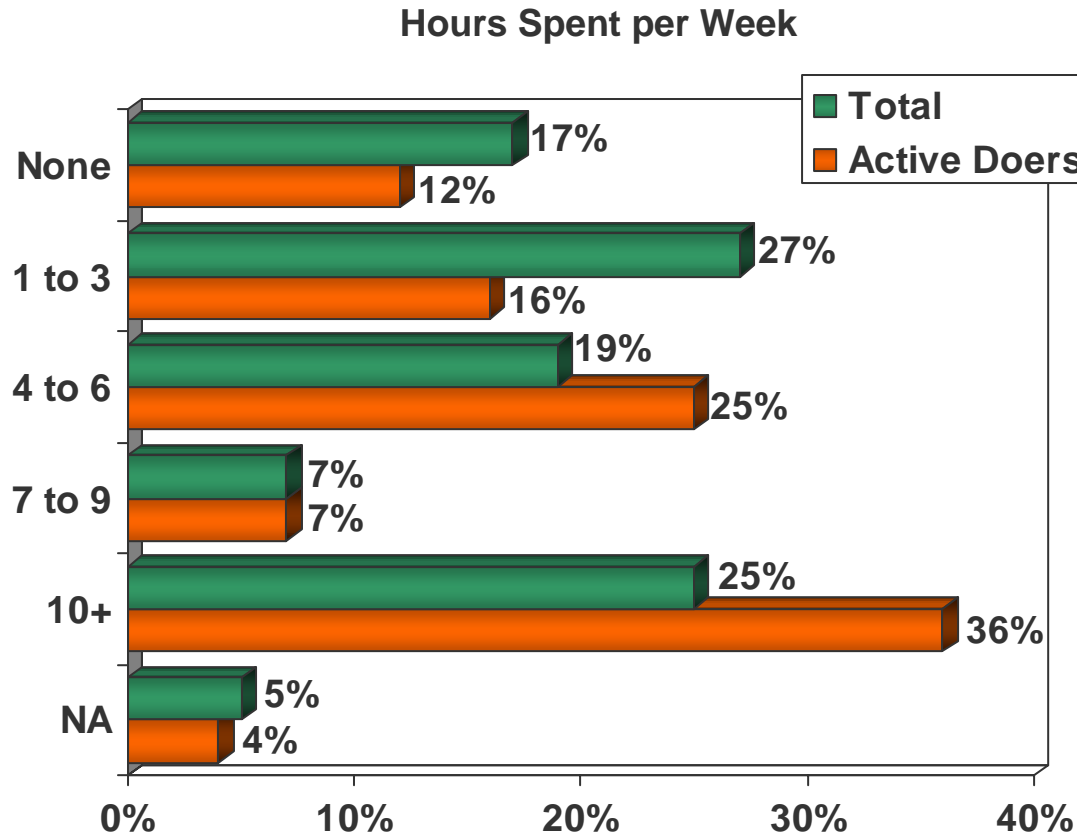
Q: Which 3 magazines do you read on a regular basis?

Internet Usage



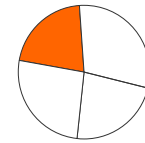
Active Doers
21%

- They're very active users of the Internet. Over one-third of Active Doers spend 10+ hours a week on the Internet. That compares to 25% of Scenic Relaxers, 30% of Big Trippers and just 12% of Homebodies who spend 10+ hours.



Q: On average, how many hours a week do you spend on the Internet?

Internet Access



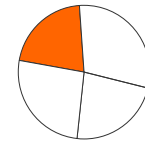
Active Doers
21%

- Active Doers and Big Trippers are more likely to have Broadband.

	Active Doers	Homebodies	Big Trippers	Scenic Relaxers
Broadband	71%	44%	70%	67%

Q: At home, which type of Internet service do you subscribe to?

Which Websites?



Active Doers
21%

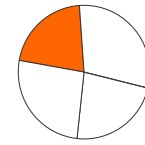
- They were asked which three Websites they visited most. Yahoo! led for Active Doers.

	Total	Active Doers
Yahoo!	20%	23%
Google	12%	13%
eBay	7%	13%
MSN	8%	12%
Other "News"	3%	5%
Fox News	1%	2%

- In contrast, Big Trippers were more apt to mention CNN and financial websites (13%). Homebodies curl up with a book and Amazon.com. Scenic Relaxers check Hotmail.

Q: Which 3 websites do you visit on a regular basis?

Internet



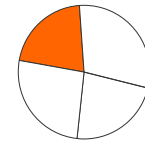
Active Doers
21%

- Active Doers are also far more likely to read travel-related emails.

	Total	Active Doers
Airline	21%	39%
Hotel Chain	13%	22%
Destination	8%	18%
Online Travel Agency	7%	11%
Cruise Line	10%	24%
Car Rental	3%	7%
None	49%	37%

Q: Do you regularly read email communications from any of the following sources?

Newspaper



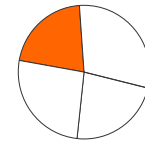
Active Doers
21%

- Active Doers are more likely to read the newspaper on a daily basis.

	Active Doers	Homebodies	Big Trippers	Scenic Relaxers
Everyday	50%	43%	46%	41%
Almost Everyday	15	14	11	14
1 – 3 times / week	15	9	8	15
Only on Sunday	8	10	13	14
Seldom	9	15	20	15
Never	2	3	2	1

Q: How often do you read a newspaper?

Media Trends

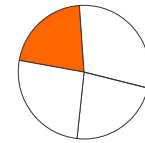


Active Doers
21%

“The amount of time I’ve spent...”	Total	Active Doers	+ / -
Online has increased	32% →	44%	+12%
Reading magazines has increased slightly	32% →	36%	+4%
Watching TV has decreased slightly	53% →	57%	+4%

Q: Which of the following describes your media habits in the past 12 months?

Ad Recall



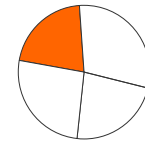
Active Doers
21%

- Active Doers are generally more aware of most states' advertising

	Total	Active Doers
Texas	37%	44%
Arkansas	36%	43%
Missouri	33%	35%
Oklahoma	29%	31%
Colorado	23%	30%
Louisiana	20%	23%
New Mexico	17%	21%
Kansas	13%	14%
Illinois	9%	11%
Nebraska	8%	8%

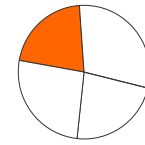
Q: For each of the states below, please indicate if you recall noticing any advertising for the state in the past 6 months.

Summary



Active Doers
21%

- Active Doers represent a very viable target for the state of Oklahoma.
- Continuing to show the variety of activities – how much there is to do – is critical.
- Based on this research, a spot with greater inclusion of gaming and casinos in the state would be of direct interest to this target.
- Appointment Network TV and Internet are the best ways to reach this target.
- Sunday editorial is also an excellent way to reach Active Doers.



Active Doers
21%

Key Findings: Spring Active Doers

- Creative should continue to emphasize the variety of “active” things to do in the state, including casinos.
- The demo should be modified to 35 – 64 years of age.
- Early morning and early evening news and select prime are good TV dayparts to reach this audience.
- Because of the propensity to be online, online should continue to play a major role in the marketing mix.
- AAA, AARP and traditional women’s publications are excellent media vehicles to reach this group.
- Earned media should also focus on “active doer” activities and options to reach these newspaper readers efficiently.

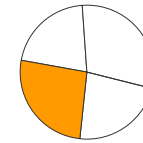
SECONDARY TARGET

Scenic Relaxers

Detailed Findings

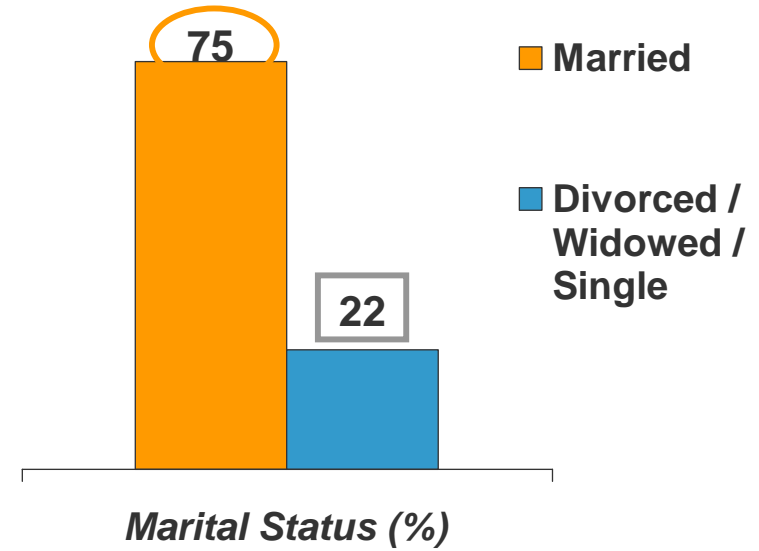


Demographic Snapshot

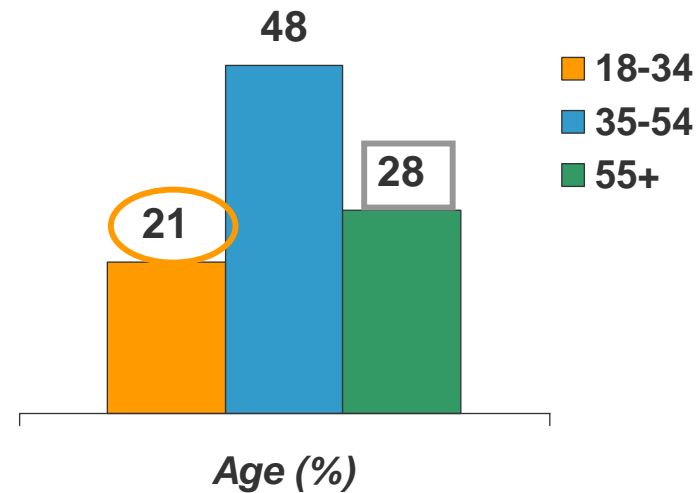
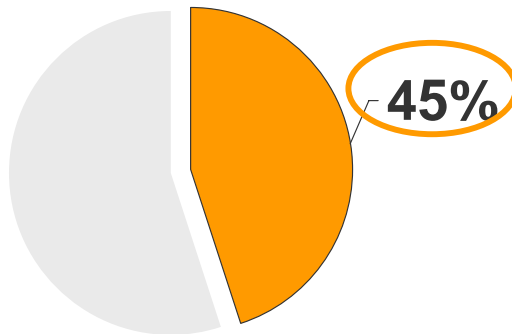


Scenic Relaxers
26%

- Young and married
 - Consistently, they are MUCH more likely than any other segment to have children.

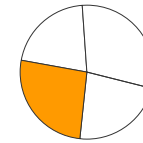


Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

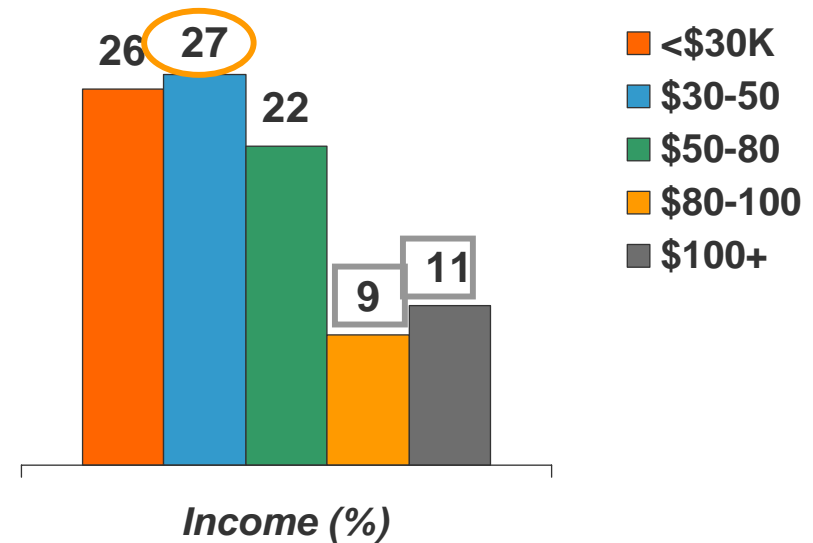
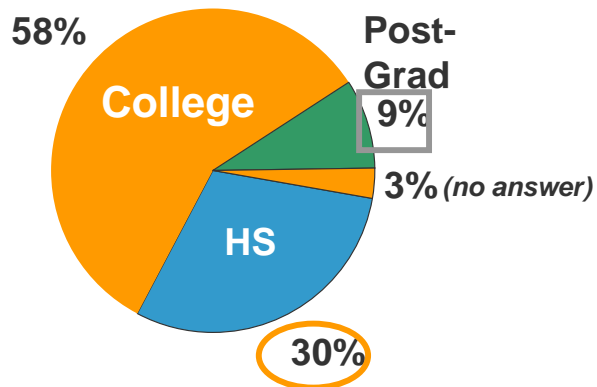
Socio-Economic Snapshot



Scenic Relaxers
26%

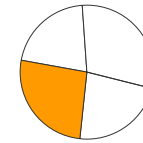
- Scenic Relaxers are more likely to have only a high-school education.
 - They also have smaller incomes than other segments.

Highest Level of Education



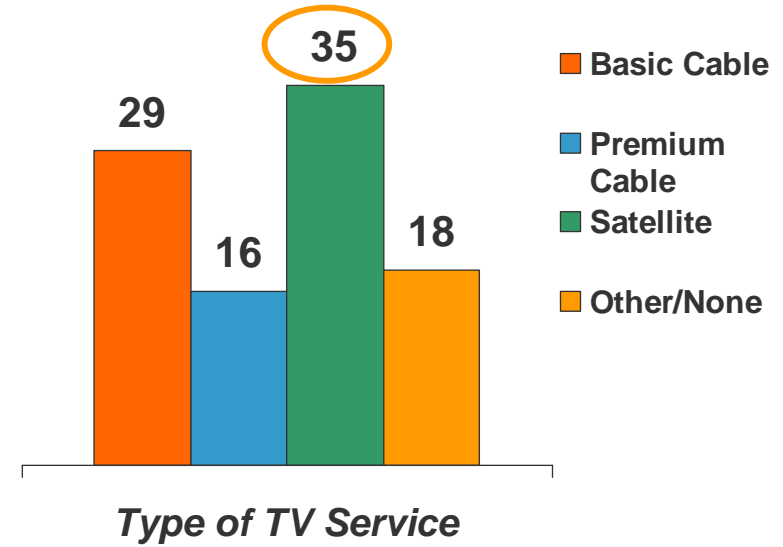
Q: Which of the following best describes the last level of school that you completed / your total household income?

Techno-graphic Snapshot

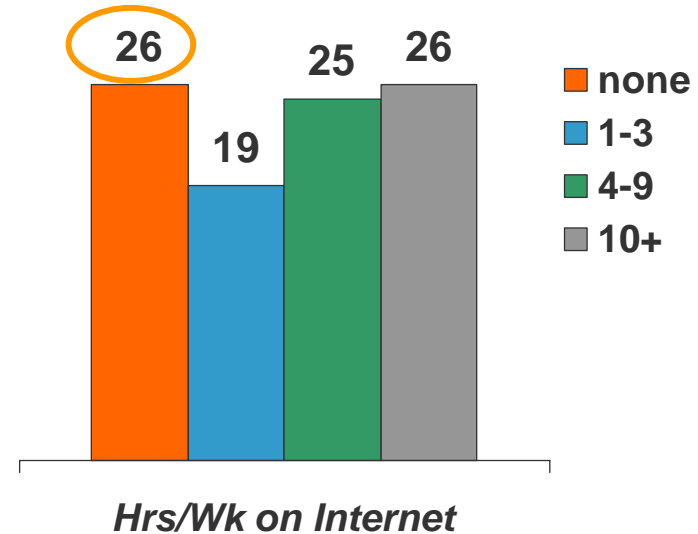
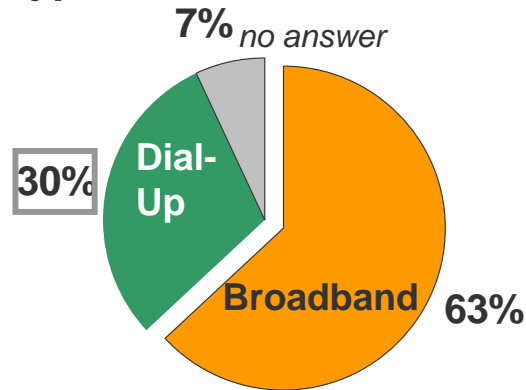


Scenic Relaxers
26%

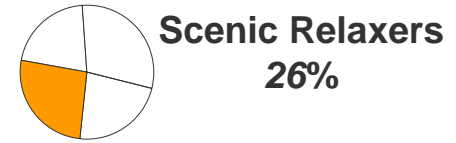
- Scenic Relaxers are the most likely to be dial-up users. Over one-quarter spend no time on the Internet.
- They're also far more apt to be satellite users – a reflection of where they live.



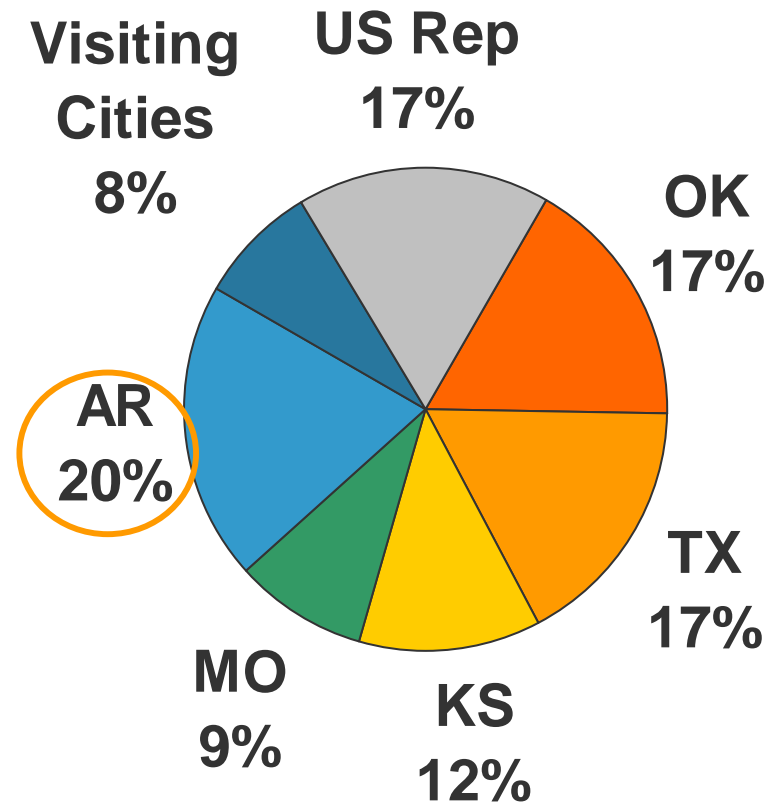
Type of Internet Service

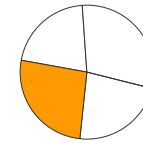


Geographic Composition



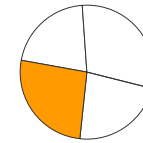
- Scenic Relaxers are comprised of a sizeable number of Oklahomans as well as a largely disproportionate share of Arkansas residents.





Scenic Relaxers
26%

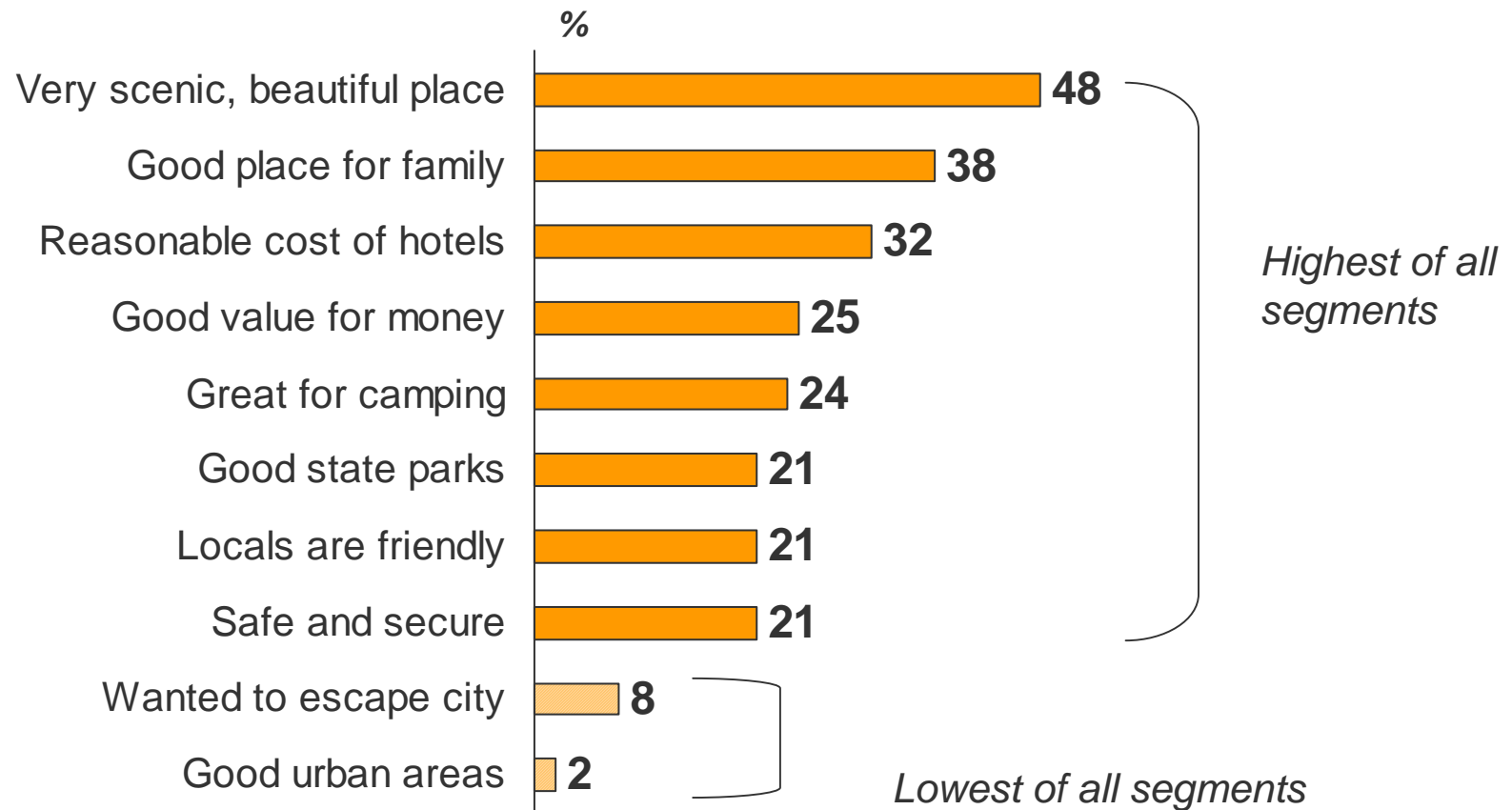
Travel Attitudes and Habits



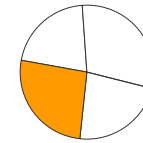
Scenic Relaxers
26%

Motivations for Most Recent Leisure Trip

- Spending time with family in a scenic place is what motivates Scenic Relaxers.

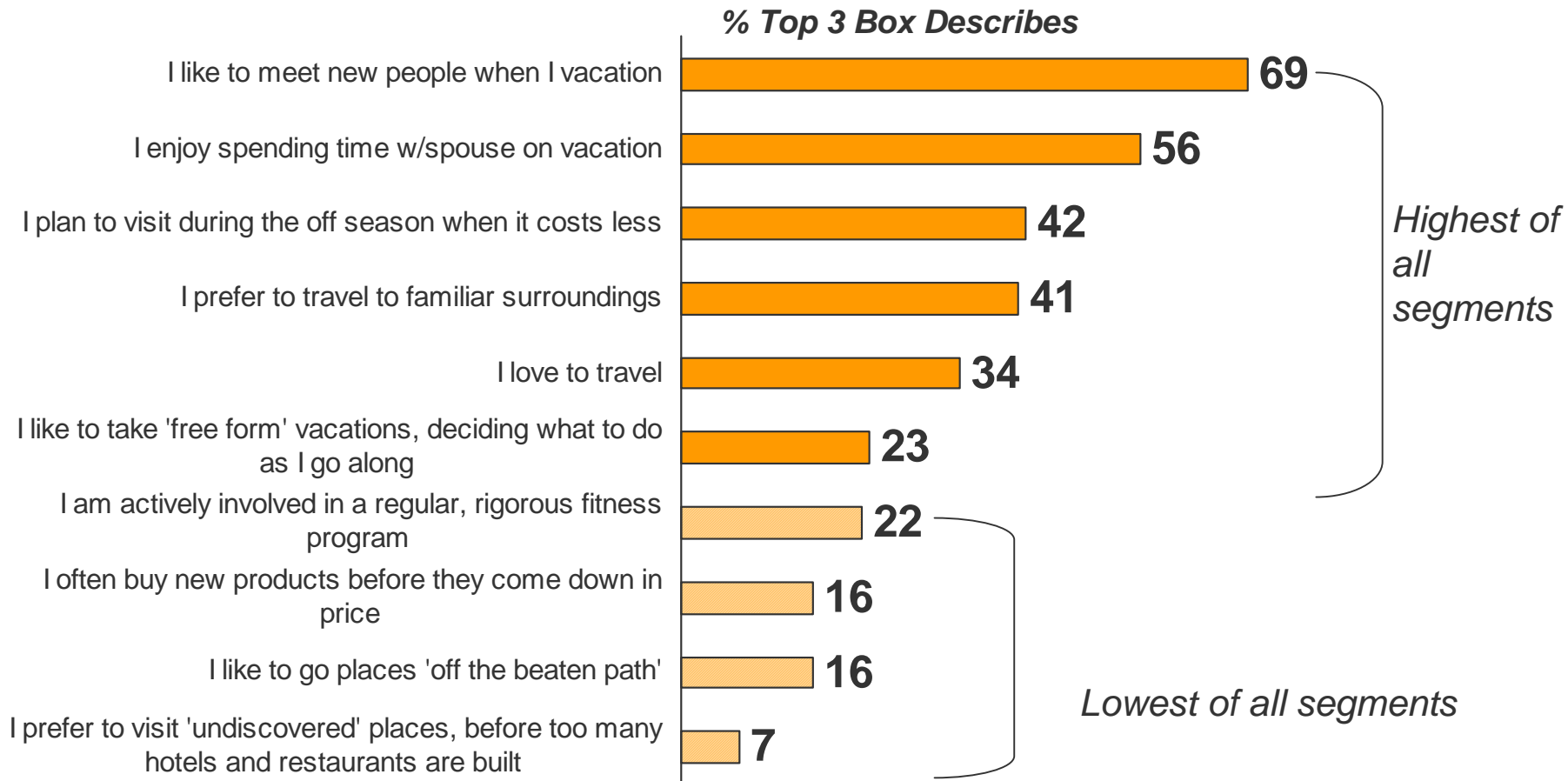


Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?

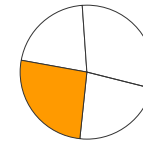


Attitudes about Travel

- Scenic Relaxers like to travel, albeit in the off-season when it is less expensive for them and their families.
- Scenic Relaxers may be a very viable Fall campaign target.



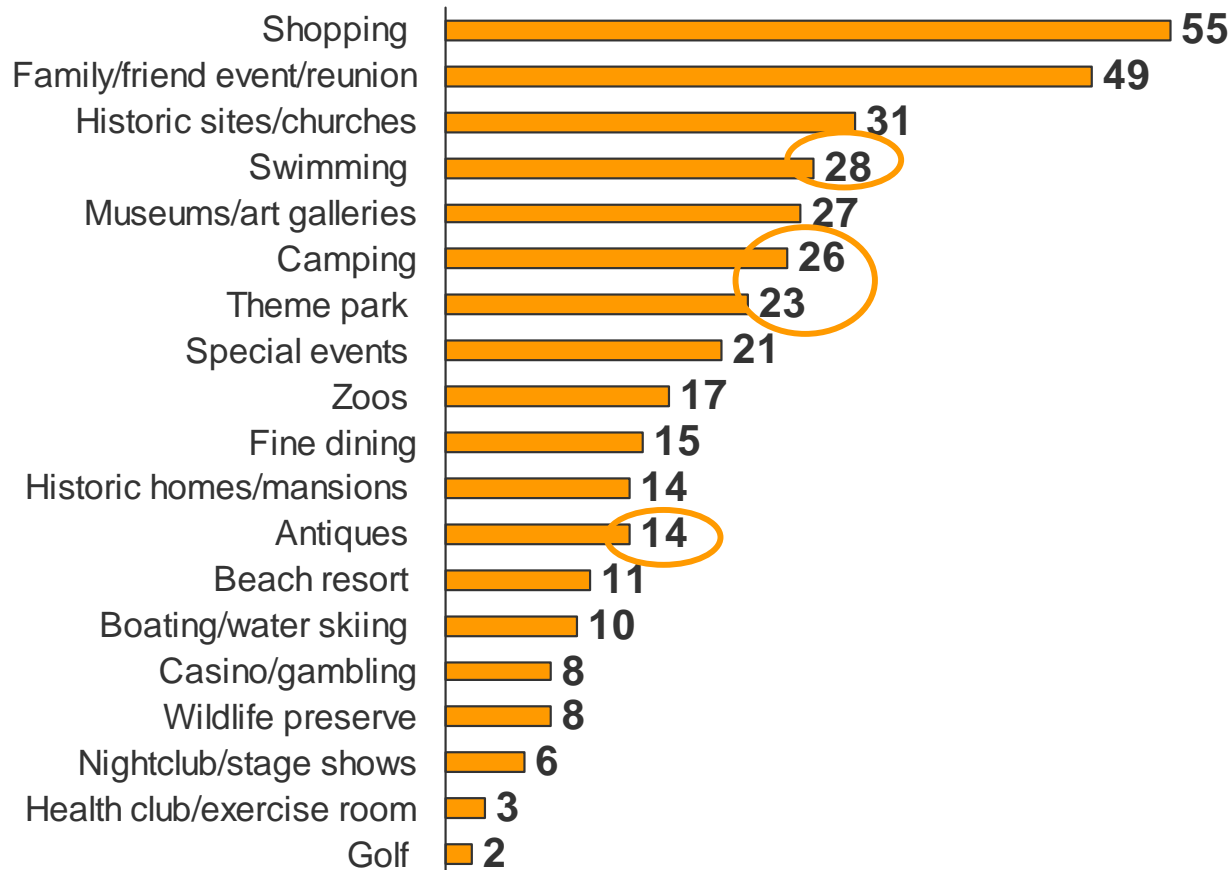
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.



Scenic Relaxers
26%

Activities on Most Recent Leisure Trip

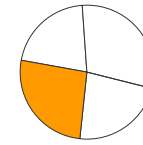
- Scenic Relaxers like to camp and the outdoors—much more so than other segments.
- They also like to shop and go antiquing.



Activities with $\geq 15\%$ mentions shown

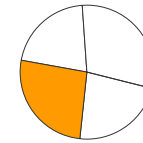
Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

Summary



Scenic Relaxers
26%

- Given their propensity to be from Oklahoma and Arkansas, Scenic Relaxers represent a key target for the Fall marketing campaign.
- To best motivate Scenic Relaxers, the Fall effort should focus on outdoor activities they love (camping, fall foliage, state parks) and family-oriented activities (such as the Sam Noble Museum and National Cowboy and Western Heritage Museum, Oklahoma Aquarium).



Scenic Relaxers
26%

Key Findings: Fall Scenic Relaxers

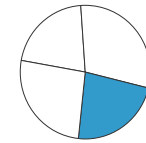
- Creative should concentrate on outdoor relaxing activities and venues that this target finds most appealing.
- The demo should be 35 – 54 years of age and include families.

TERTIARY “STRETCH” TARGET

Big Trippers

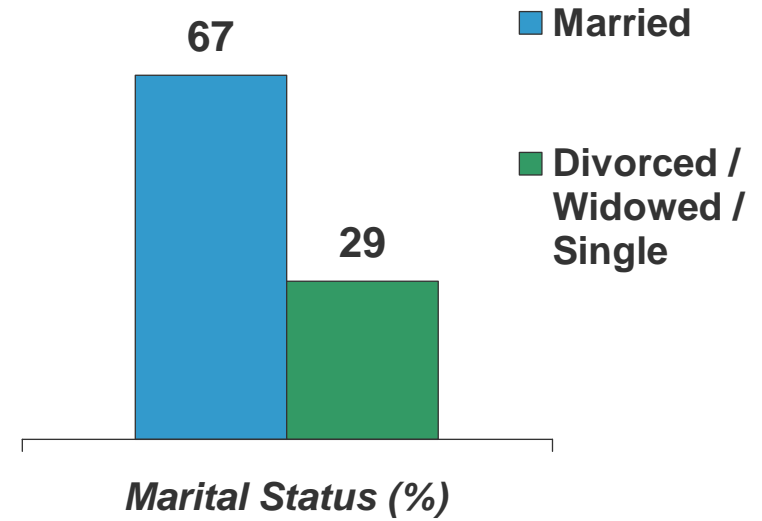
Detailed Findings

Demographic Snapshot

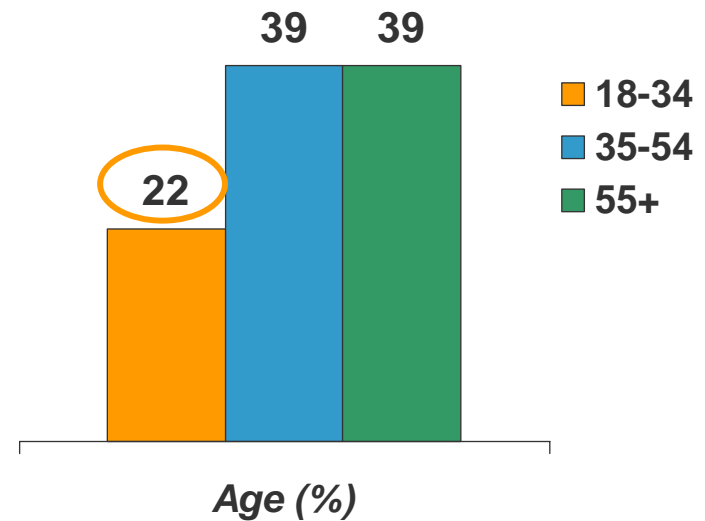
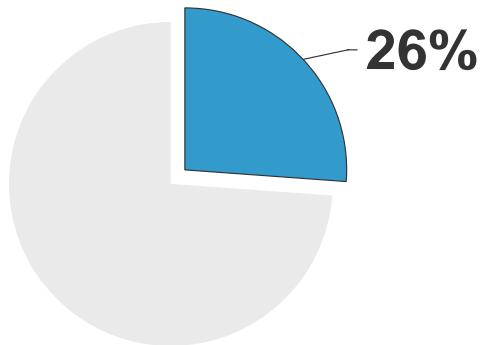


Big Trippers
23%

- Young couples and singles
- Average proportion of households with children.

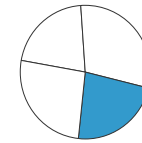


Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

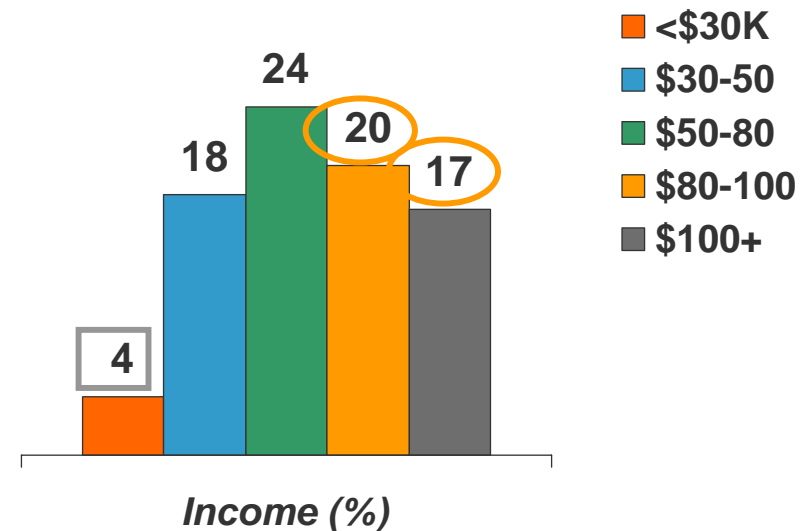
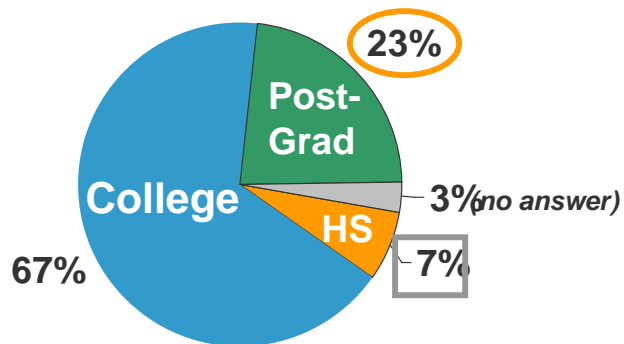
Socio-Economic Snapshot



**Big
Trippers
23%**

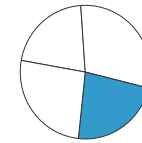
- Nearly a quarter of Big Trippers have a post-graduate education; almost all have college educations.
- Big Trippers are among the wealthiest of all segments.

Highest Level of Education



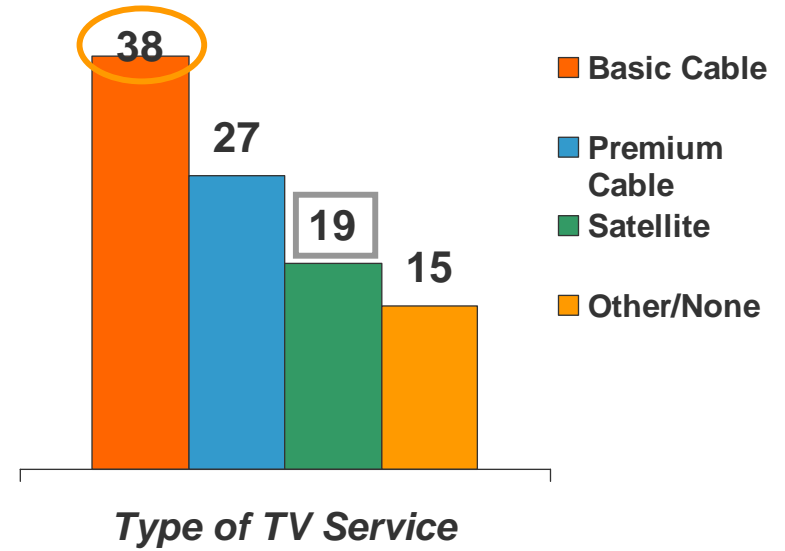
Q: Which of the following best describes the last level of school that you completed / your total household income?

Techno-graphic Snapshot

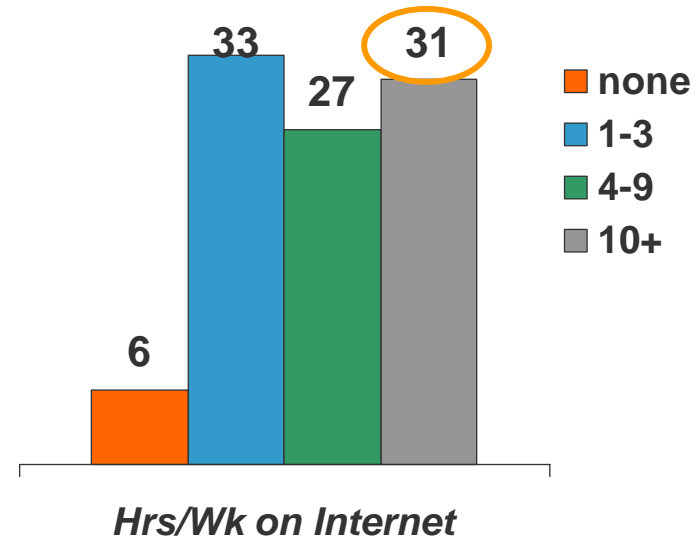
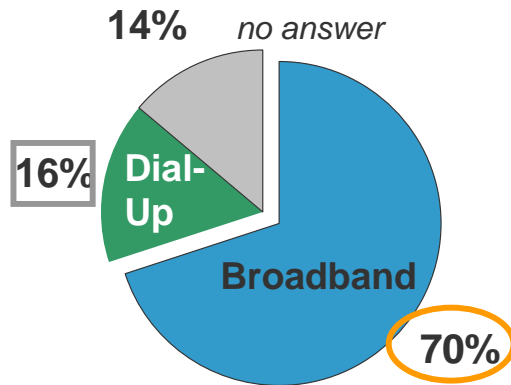


Big Trippers
23%

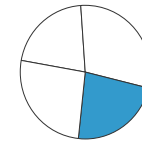
- Big Trippers, like Active Doers, spend a lot of time online, and have broadband access.
- When it comes to cable TV, although they have the financial resources, they don't pay for premium cable.



Type of Internet Service

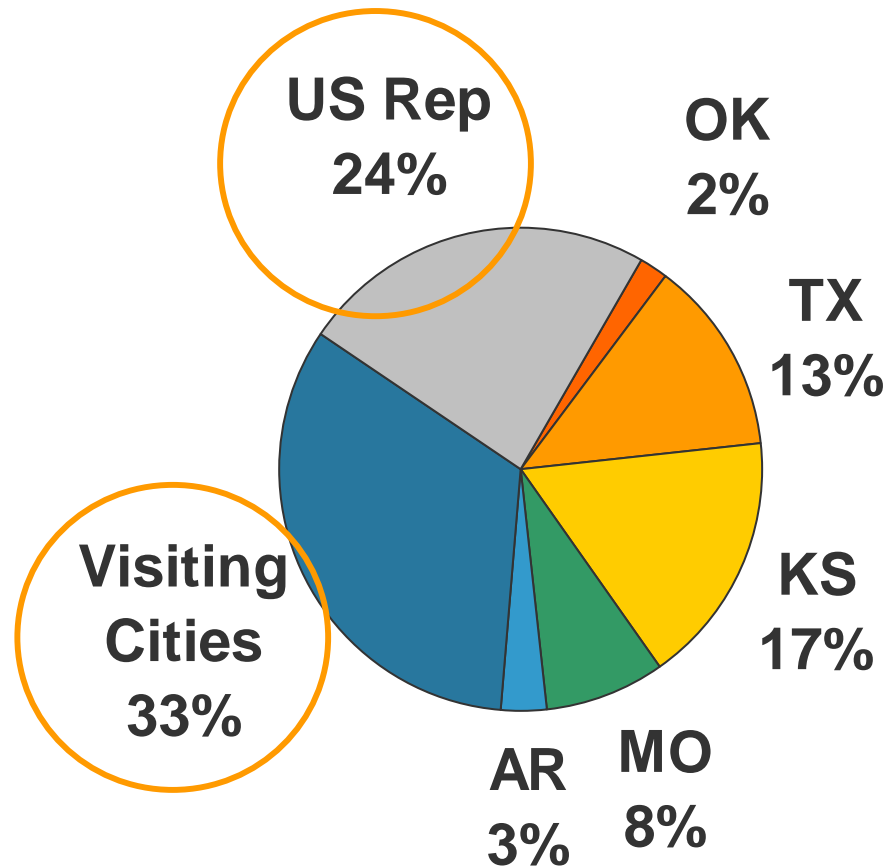


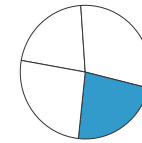
Geographic Composition



**Big
Trippers
23%**

- Well over half of Big Trippers live well outside of the area around OK.

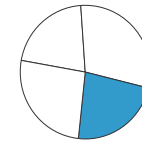




**Big
Trippers
23%**

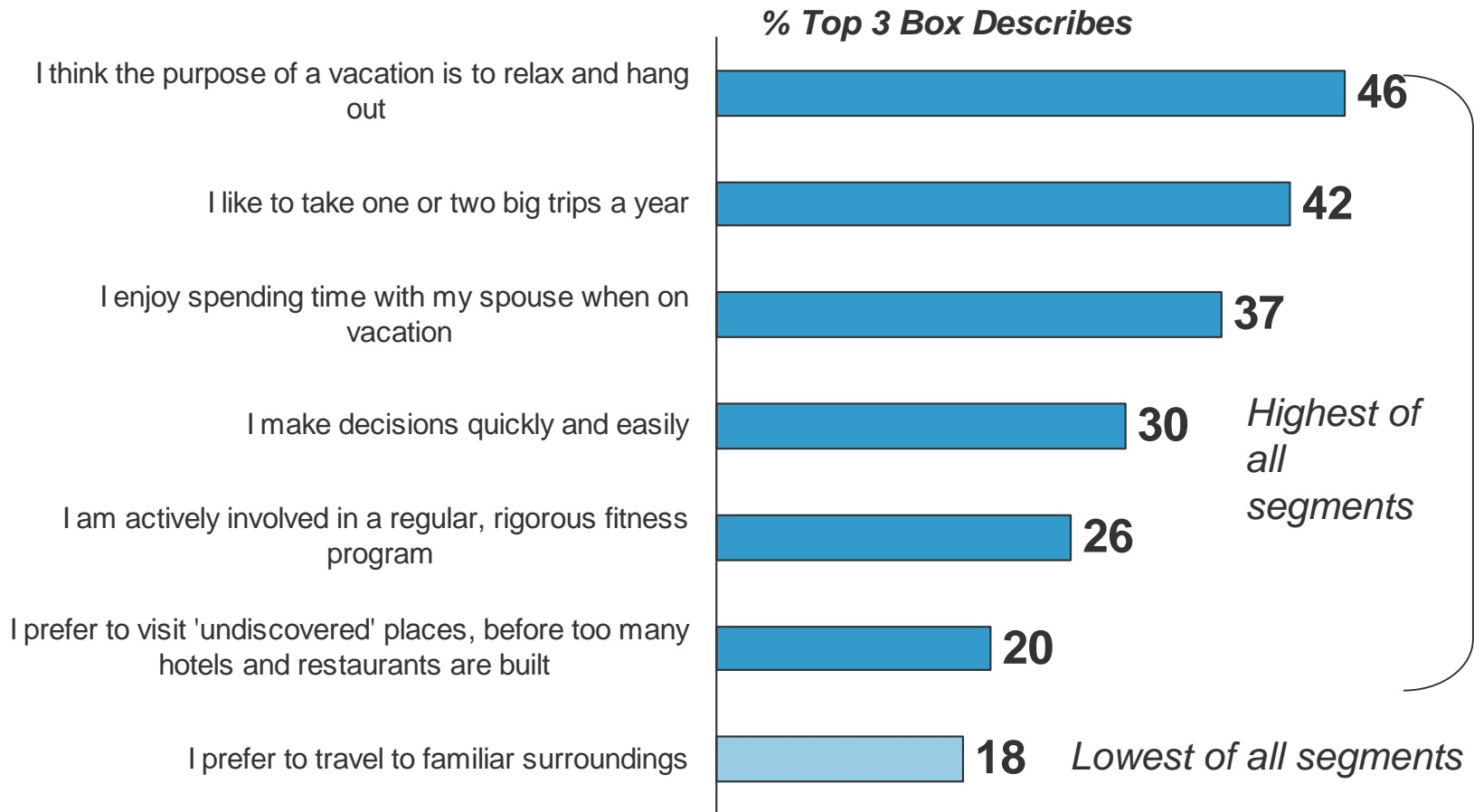
Travel Attitudes and Habits

Attitudes about Travel

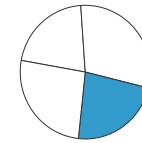


Big Trippers
23%

- Big Trippers are the most likely to plan for BIG vacations, often to undiscovered locations.



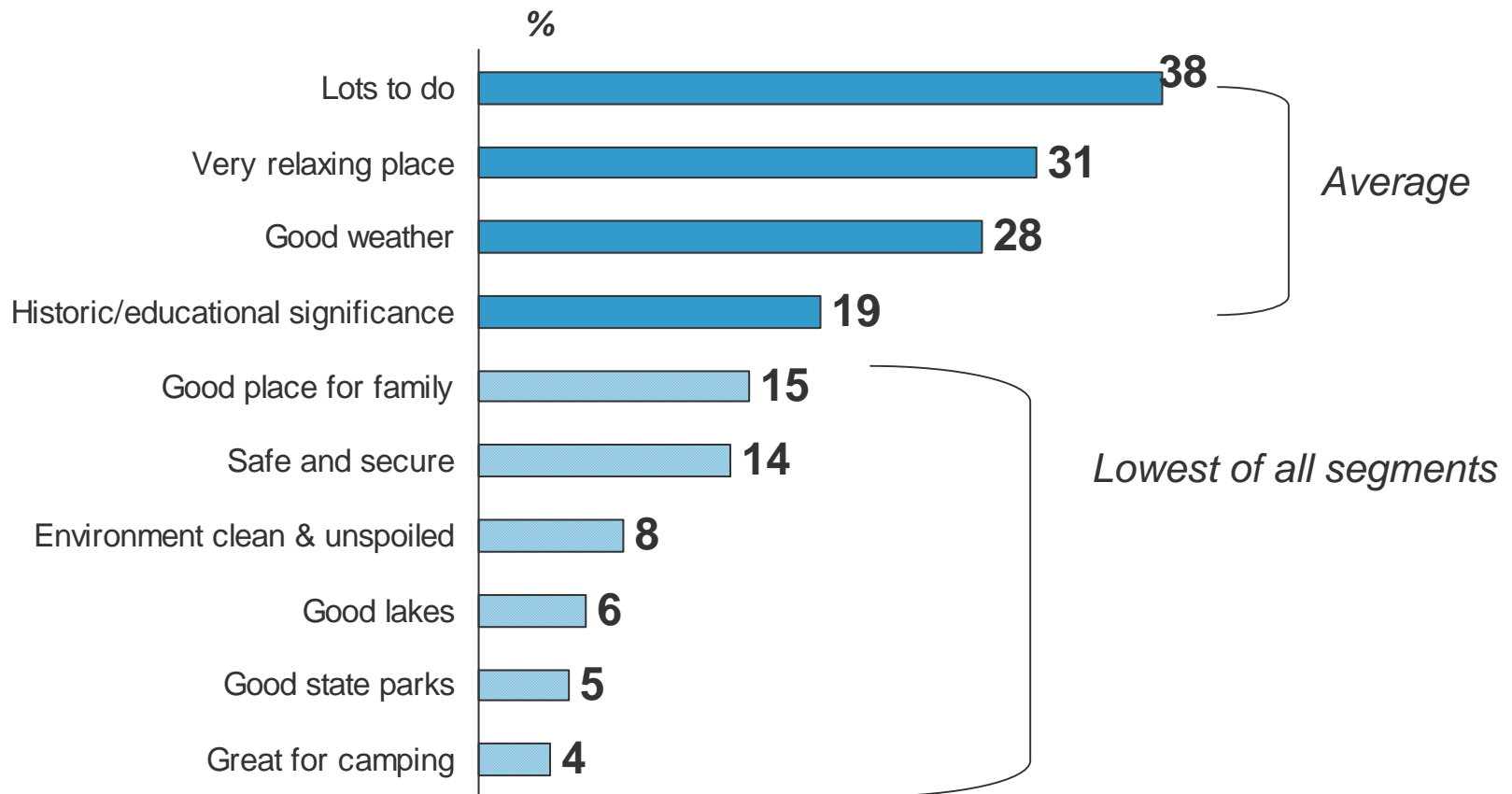
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.



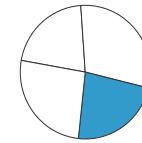
Big Trippers
23%

Motivations for Most Recent Leisure Trip

- Big Trippers are the most eclectic travelers and have the widest variety of motivations for travel. What *DOESN'T* motivate them is being a good place to take the family and the outdoors.



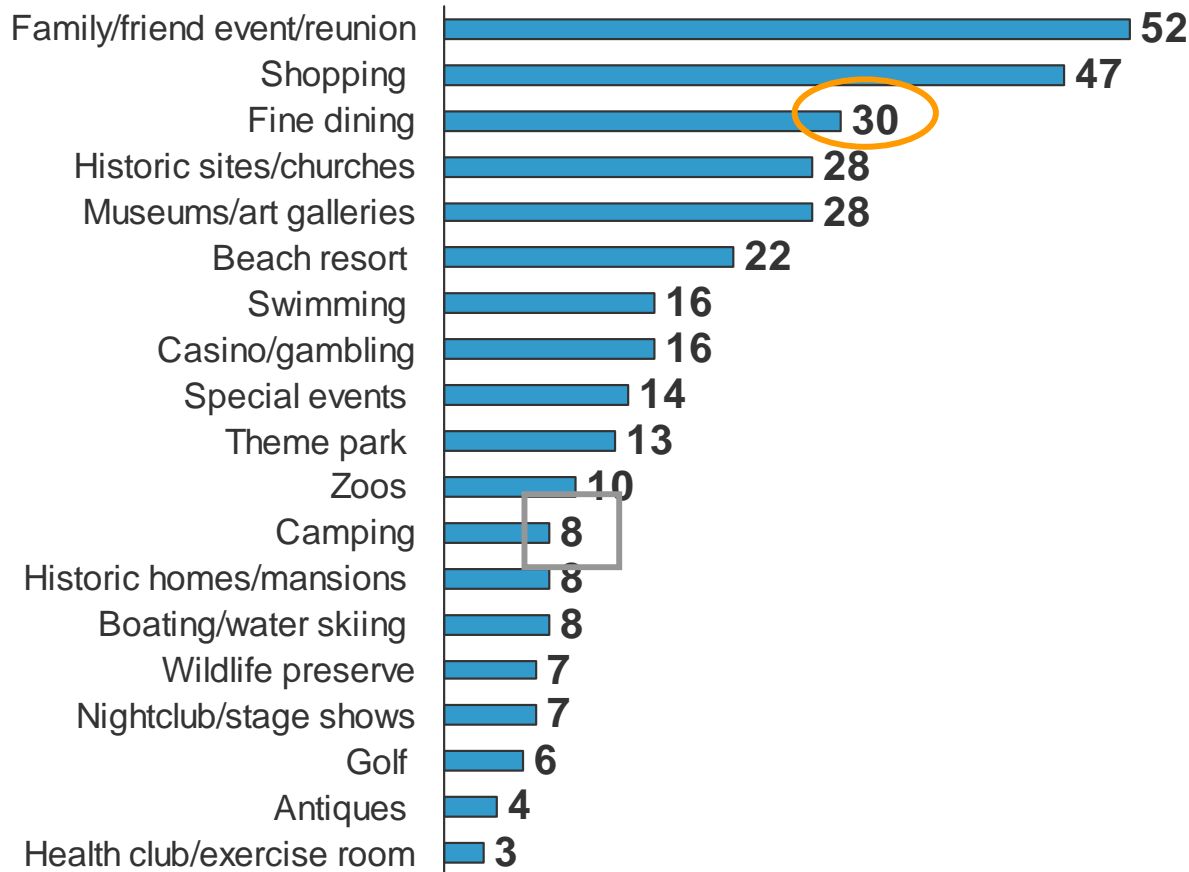
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?



Big Trippers
23%

Activities on Most Recent Leisure Trip

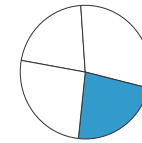
- This doesn't mean they don't like to visit family and friends. They do.
- They also especially like shopping and fine dining. What don't they like? Camping?



Activities with $\geq 15\%$ mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

Summary



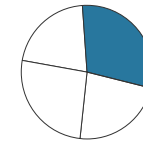
Big Trippers
23%

- Although Big Trippers have deep pockets, the fact that they are more likely to live outside the region and are more interested in more exotic vacations makes them a far less viable target opportunity.

DO NOT TARGET Homebodies

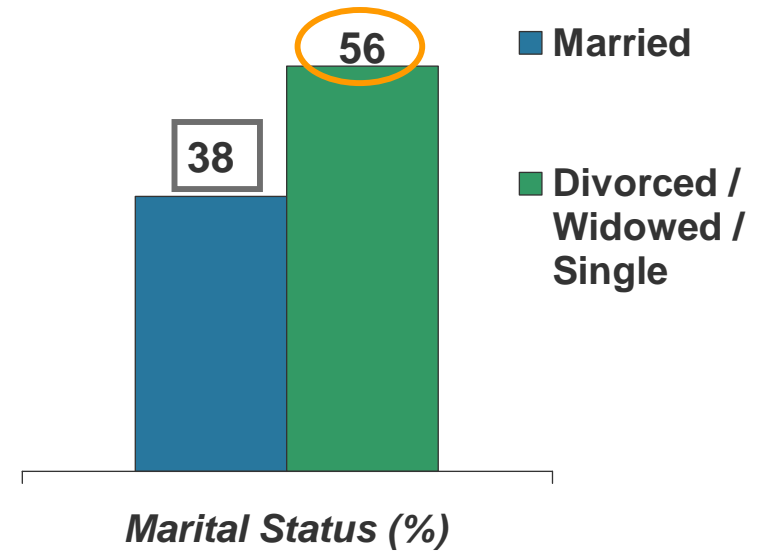
Detailed Findings

Demographic Snapshot

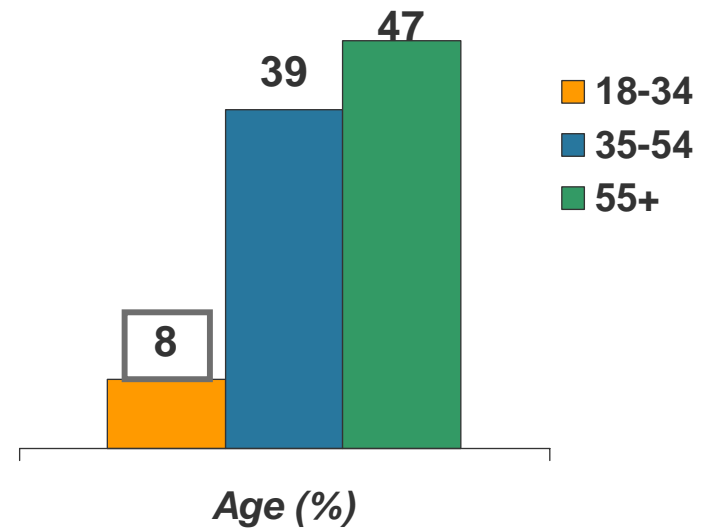
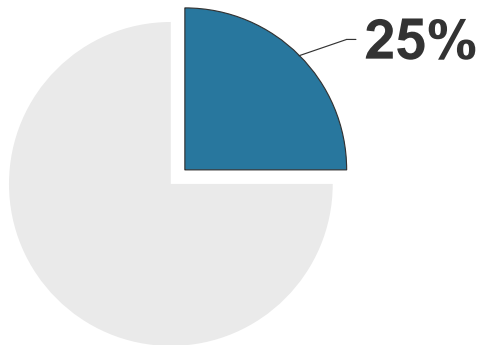


Homebodies
30%

- Homebodies are more apt to be single-parent and widowed households.
- Homebodies tend to be older.

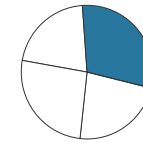


Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

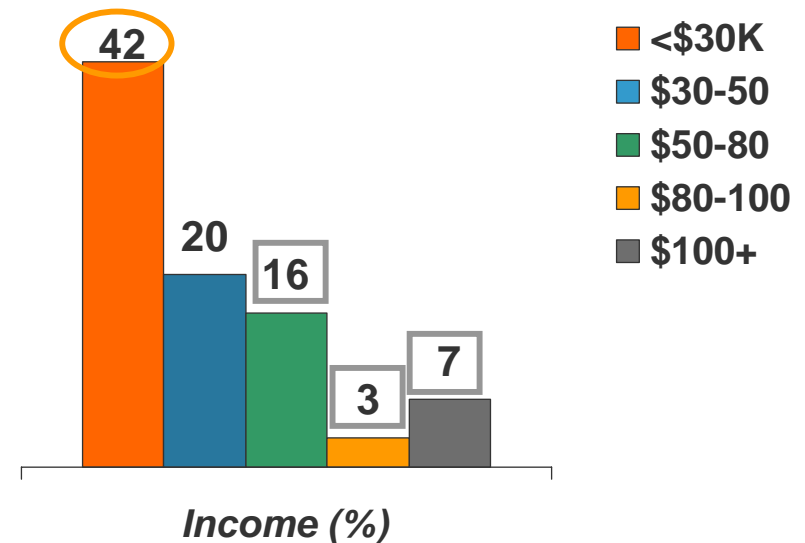
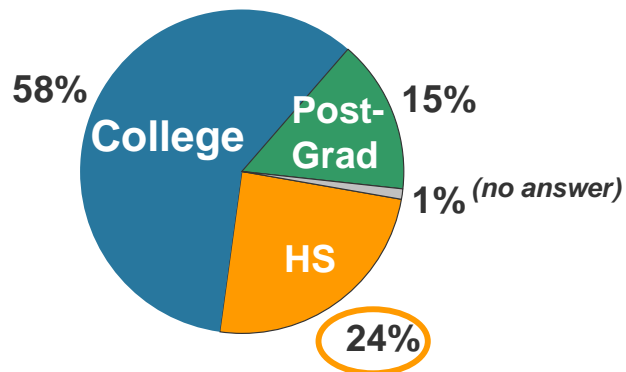
Socio-Economic Snapshot



Homebodies
30%

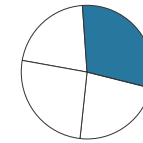
- Homebodies are strikingly the least wealthy of all segments, and, along with Scenic Relaxers, are the most likely to have only a high school education.

Highest Level of Education



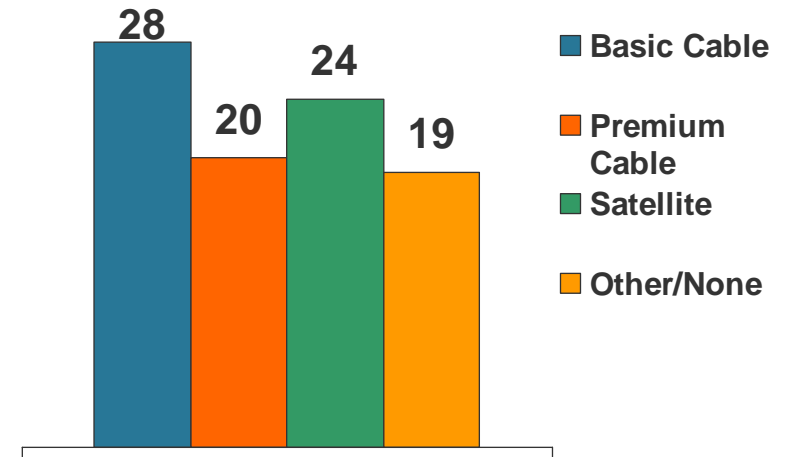
Q: Which of the following best describes the last level of school that you completed / your total household income?

Techno-graphic Snapshot



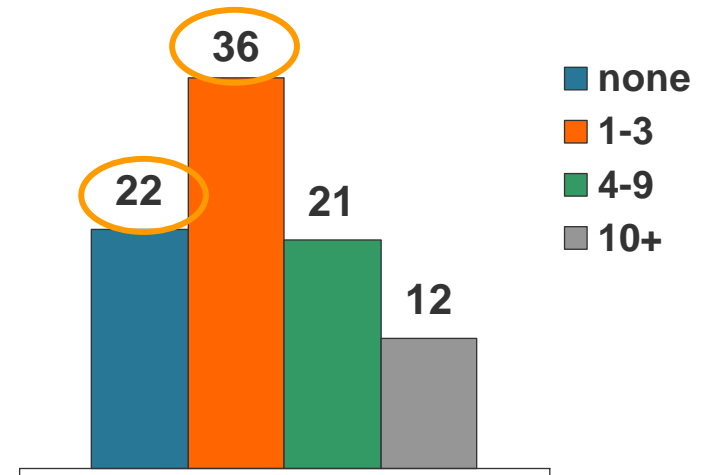
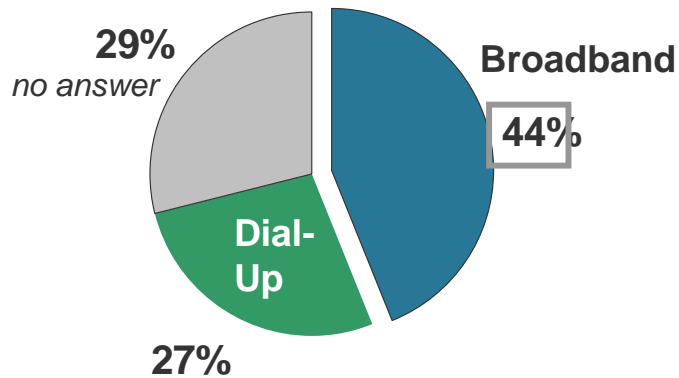
Homebodies
30%

- Homebodies spend little time, if any, on the Internet.



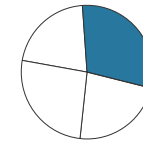
Type of TV Service

Type of Internet Service



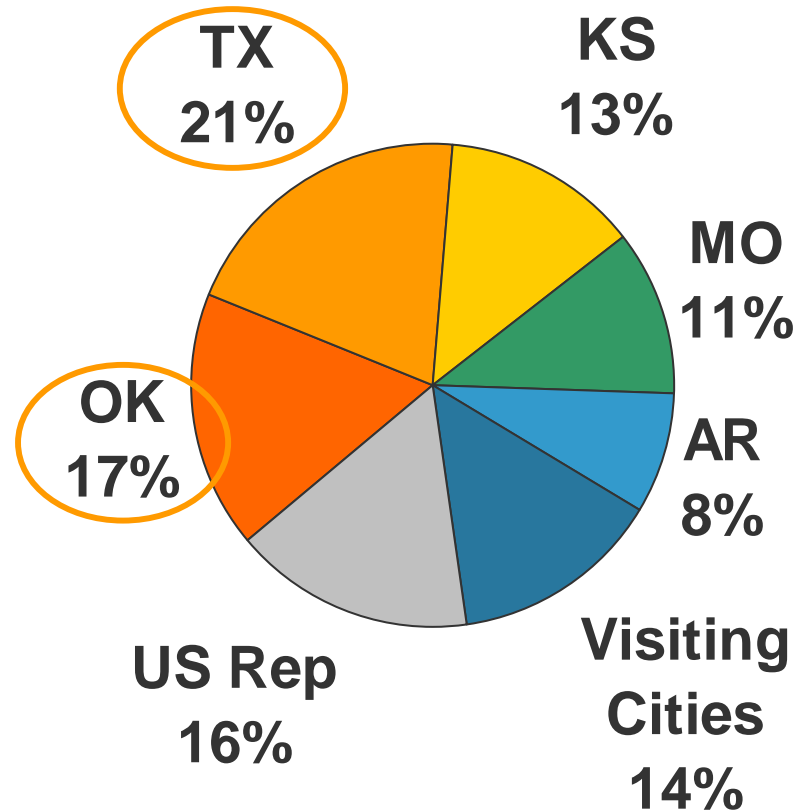
Hrs/Wk on Internet

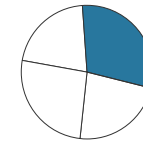
Geographic Composition



Homebodies
30%

- Homebodies are likely to live in OK and TX as well as surrounding states.

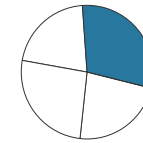




Homebodies
30%

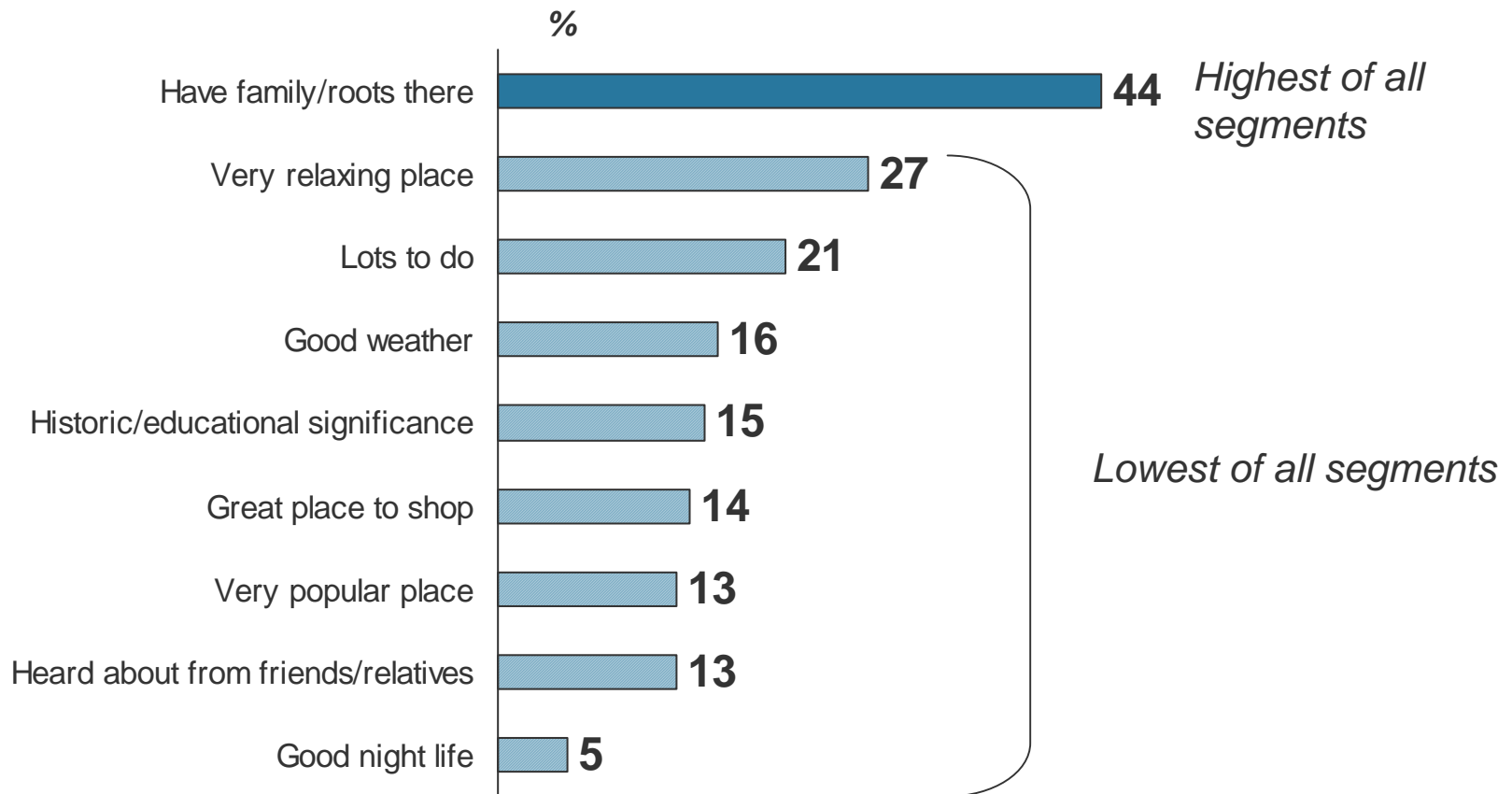
Travel Attitudes and Habits

Motivations for Most Recent Leisure Trip



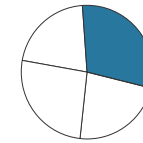
Homebodies
30%

- The biggest...and virtually only...motivator for Homebodies to travel is because of family.



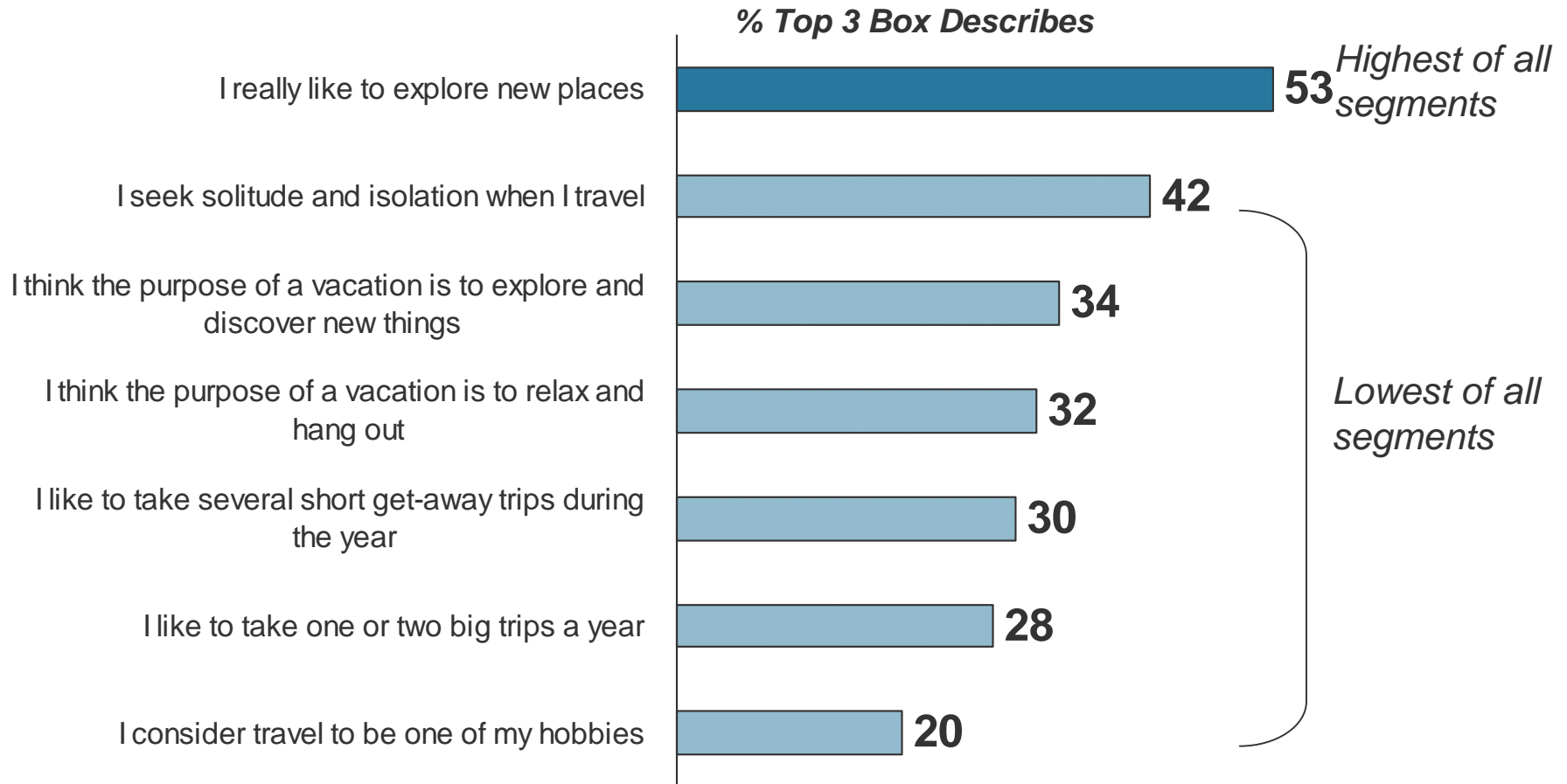
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?

Attitudes about Travel

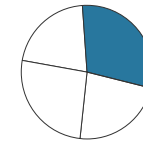


Homebodies
30%

- Although Homebodies don't travel much except to visit family, they aspire to explore new places.



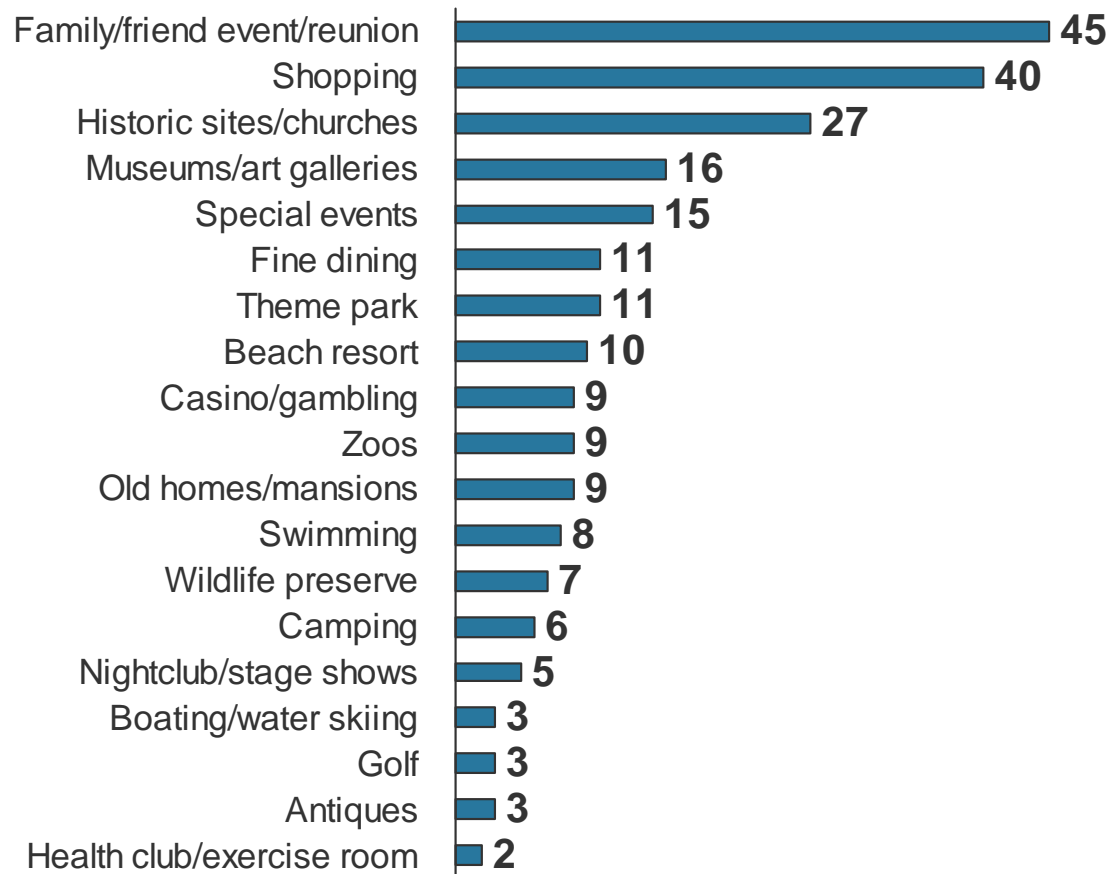
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.



Homebodies
30%

Activities on Most Recent Leisure Trip

- Homebodies—because they really don't travel much—are the least involved in vacation activities.



Activities with $\geq 15\%$ mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

Appendix



Who are These Consumers?

Lifestage Profile

- Active Doers tend to be older, perhaps retired, which explains their extra time and money for travel.

- Big Trippers are younger singles and couples with a slight male skew.

- Scenic Relaxers are families, with the highest concentration of children of all segments

	Homebodies	Big Trippers	Scenic Relaxers	Active Doers
Age (%)				
18-34	8	22	21	9
35-54	39	39	48	39
55+	47	39	28	52
<i>no answer</i>	6	0	3	0
Gender (%)				
Male	19	22	10	17
Female	75	77	88	83
<i>no answer</i>	6	1	2	0
Marital Status (%)				
Married	38	67	75	70
Divorced	20	6	11	8
Widowed	19	7	5	9
Single	17	16	6	9
<i>no answer</i>	6	4	3	4
Children < 17 in Household? (%)				
Yes	25	26	45	27

Who are These Consumers?

Socio-Economic Profile

- Big Trippers and Active Doers are better educated and have higher incomes than other groups.

- Homebodies have by far the lowest household incomes.

Income (%)

under \$30,000
 30,000 to \$49,999
 50,000 to \$79,999
 80,000 to \$99,999
 \$100,000 +
 no answer

Education (%)

High school or less
 Some college
 College graduate
 Post graduate
 no answer

	Homebodies	Big Trippers	Scenic Relaxers	Active Doers
Income (%)				
under \$30,000	42	4	26	5
30,000 to \$49,999	20	18	27	10
50,000 to \$79,999	16	24	22	29
80,000 to \$99,999	3	20	9	18
\$100,000 +	7	17	12	26
no answer	12	13	13	17
Education (%)				
High school or less	24	7	31	11
Some college	38	26	32	42
College graduate	20	42	26	21
Post graduate	15	24	9	25
no answer	12	13	13	1

Media Habits

- The heavy travelers are also the consumers who spend the most time on the Internet.

- Scenic Relaxers are by far the most likely to have satellite, perhaps because of availability issues in rural areas where they live.

- Talk radio is big among the heavy travelers.

- Scenic Relaxers listen to popular music: Rock, Top 40 and Country.

Hours per Week on Internet

None

1-3

4-9

10+

No answer

Type of TV Service

Cable TV-Basic service

Cable TV-Premium service

Satellite TV

Other

Don't subscribe / use antennae

No answer

Music Formats Listened to

News

National Public Radio

Adult contemporary

Jazz

Classical

Rock

Sports

Talk

Top 40

Country

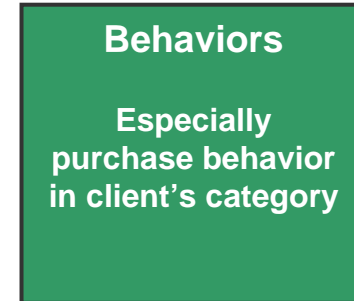
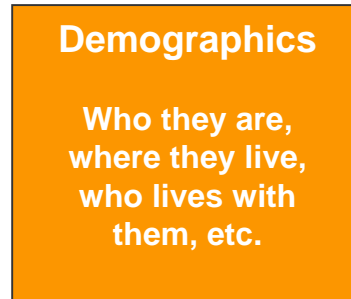
Satellite Radio (Such as Sirius, XM)

Big Band

	Homebodies	Big Trippers	Scenic Relaxers	Active Doers
(%)				
None	22	6	26	12
1-3	36	33	19	16
4-9	21	27	25	33
10+	12	31	26	36
No answer	8	2	5	4
Cable TV-Basic service	28	38	29	27
Cable TV-Premium service	20	27	16	34
Satellite TV	24	19	35	21
Other	1	1	1	1
Don't subscribe / use antennae	18	14	17	14
No answer	9	2	1	4
News	25	31	19	28
National Public Radio	14	17	10	14
Adult contemporary	12	22	11	26
Jazz	11	11	6	14
Classical	19	20	16	12
Rock	30	30	35	28
Sports	5	8	9	10
Talk	11	21	11	21
Top 40	18	19	24	16
Country	34	31	44	38
Satellite Radio (Such as Sirius, XM)	3	6	5	7
Big Band	1	-	1	-

Concept of Using Multiple Domains to Define Segments

- Domains refer to the different categories of information we can use to describe consumers. Three common domains are:



- The most important domain is the Behavioral domain—b/c no matter how dynamic the segments may be based on what they believe, how much they make or where they live, if they don't differ with regard to what they *purchase*, they are of limited use.
- By the same token, if segments are behaviorally distinct, but are too similar attitudinally or demographically, they leave us wanting of more insight on methods and messages to effectively communicate with each group of consumers
- Ideally, segments should be distinct on all domains of interest to the category

Brief Review of Methodology

- Traditionally, segmentations have grouped consumers using only attitudes or only behaviors. Often, segments produced by these methods have been very distinctive on one domain (e.g., attitudes) but have lacked robustness on others (e.g., behaviors), resulting in limitations on the segmentation's usefulness for marketing efforts.
- In contrast to traditional methods, the Multi-Domain approach introduces an additional step prior to clustering process. This preliminary step (called “canonical correlation”) examines the relationship between two sets of items and produces **new** variables for clustering that represent this correlation, guaranteeing maximal differentiation on **all** domains included in the research. Below is just one example of how a multi-domain approach may be structured.

