



# Oklahoma Travel Impacts

2015

# Methodology and Background

- Dean Runyan Associates prepared this study for the Oklahoma Tourism and Recreation Department to document the economic significance of the travel industry in Oklahoma from 2010 to 2015.
- These findings show the level of travel spending made by visitors traveling to and through the state, and the impact this travel spending had in terms of travel-generated earnings, employment, and tax revenue for each of the state's 77 counties.
- The impacts associated with both overnight and day travel are included if the travelers remain at the destination overnight or the destination is over 50 miles, one-way, from the traveler's home.
- The purpose of such travel can be for business, pleasure, shopping, to attend meetings, or for personal, medical, or educational purposes.

# Methodology and Background

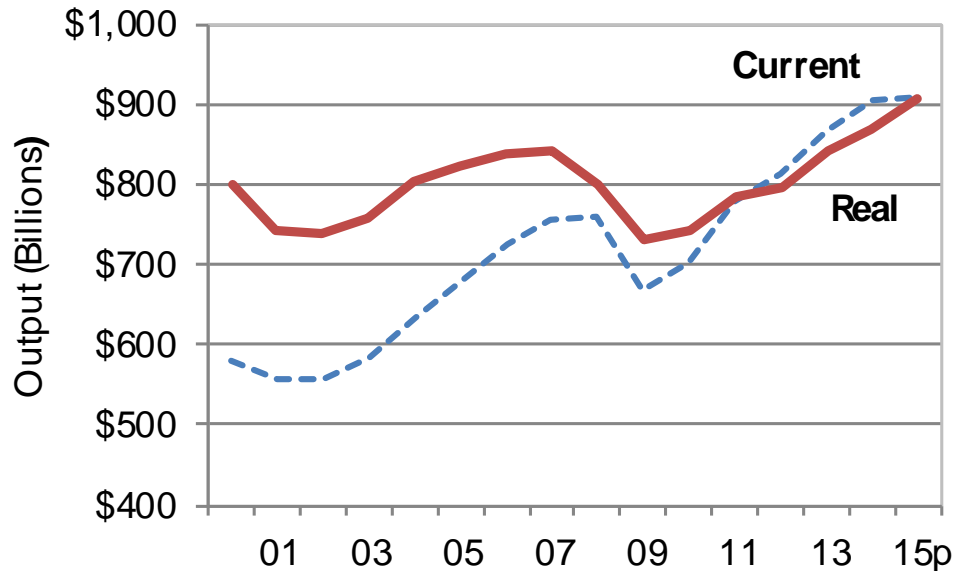
- The estimates of the travel impacts in Oklahoma were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts were gathered from various local, state and federal sources.
- These estimates are comparable to the U.S. Travel and Tourism Satellite Accounts produced by the Bureau of Economic Analysis.
- Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984.

# Travel and Tourism Impact Categories

Impact Category	Description
<b>Travel Spending</b>	Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.
<b>Total Earnings</b>	The earnings (wage and salary disbursements, earned benefits and proprietor income) of employees and owners of businesses that receive travel expenditures. Only the earnings attributable to travel expenditures are included; this typically is only a portion of all business receipts.
<b>Employment</b>	Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.
<b>Local Tax Receipts</b>	Tax receipts collected by cities and counties, as levied on applicable travel-related purchases (e.g., lodging, occupancy, and sales taxes).
<b>State Tax Receipts</b>	State motor fuel taxes, auto rental tax, sales taxes, lodging taxes and business and personal income taxes attributable to travel expenditures, as well as the travel-generated portion of tribal gaming exclusivity fees.

# U.S. Travel Trends: Direct Travel Spending

Annual Direct Travel Spending in U.S., 2000-2015



Spending by resident and foreign visitors was \$909 billion in 2015 in current dollars. This reflects virtually no increase over 2014, largely due to lower prices for motor fuel.

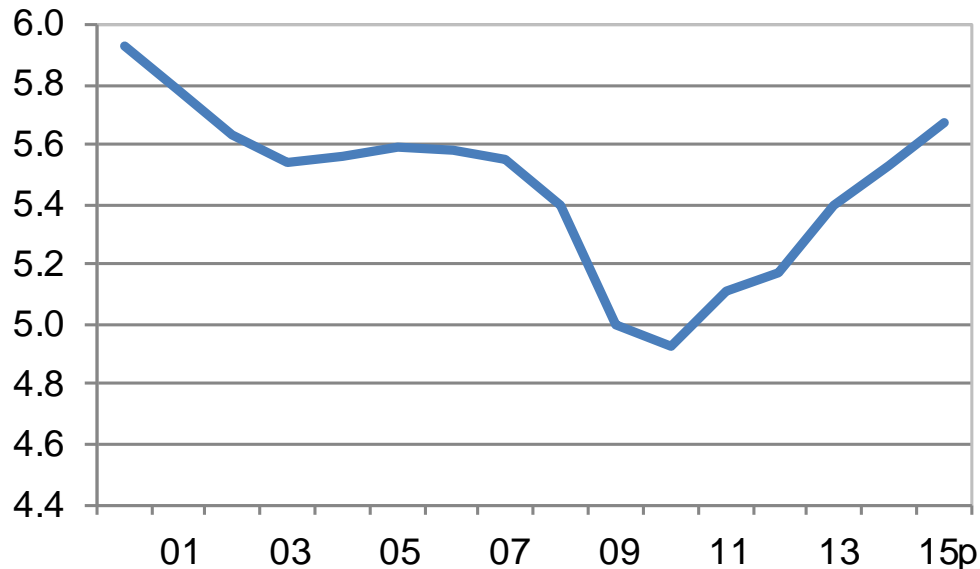
From 2010 to 2015, direct travel spending increased by 4.4% per year.

This compares to a 3.1% average annual increase in travel spending for Oklahoma over 2010-2015.

Sources: Bureau of Economic Analysis Travel & Tourism Satellite Accounts, Dean Runyan Associates

# U.S. Travel Industry Employment

U.S. Travel Industry Employment



Travel-generated employment has increased at a steady rate since 2010.

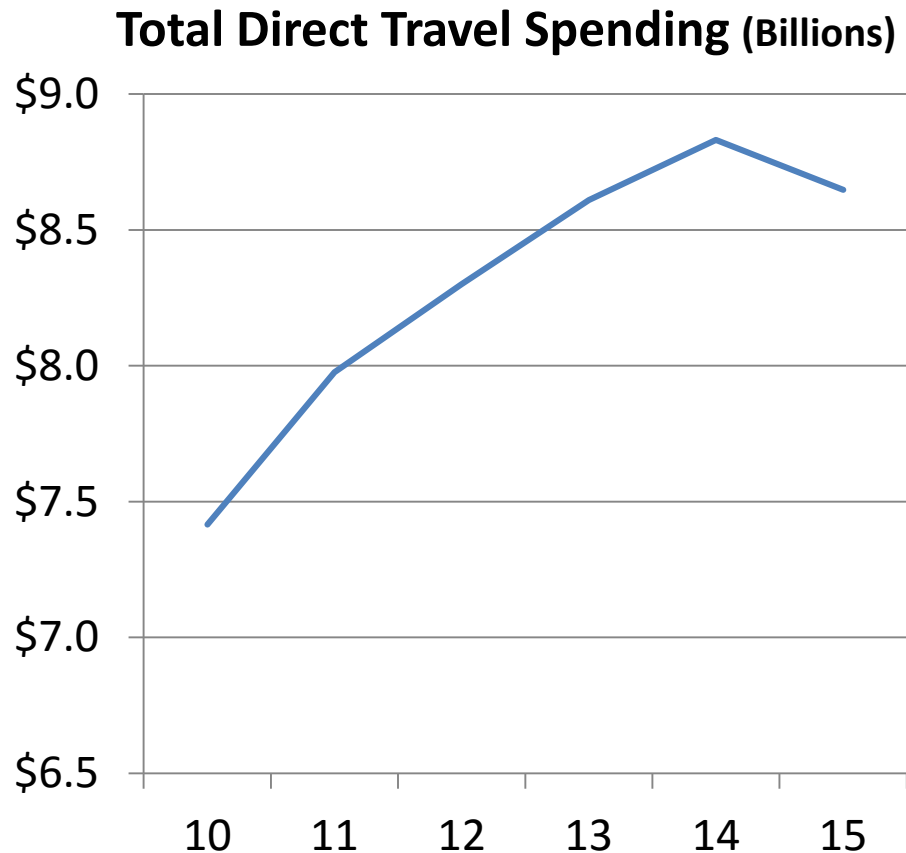
Travel industry employment has now recovered to the level immediately preceding the 2008-09 recession, although it is still below its peak earlier in that decade.

Sources: : Bureau of Economic Analysis Travel & Tourism Satellite Accounts, Dean Runyan Associates

# Oklahoma Travel Impact Highlights

- Total direct travel spending in Oklahoma was \$8.6 billion in 2015. Largely due to a decline in the price of motor fuel, total direct travel spending declined by 2.1 percent over the preceding year.
- Most notably, non-transportation visitor spending (not including motor fuel and visitor air transportation) of over \$8 billion increased by 2.4 percent over 2014. Since 2010, non-transportation visitor spending in the state has increased on average by 4.3 percent per year.
- Direct travel-generated employment was 98,300 in 2015, an increase of 3 percent over the previous year. On average, direct travel-generated employment has increased steadily by 2.6 percent per year since 2010.
- Direct travel-generated earnings was \$2.1 billion in 2015, an increase of 4.2 percent over the previous year; travel-generated earnings have grown by an average of 4.4 percent per year since 2010.
- Local, state, and federal tax revenue generated by travel spending totaled \$986 million in 2015: \$265 million local (an increase of 2.5%), \$369 million state (an increase of 1.5%), and \$352 million federal. Combined state and local tax revenue is equivalent to \$415 for each Oklahoma household, and represent 4 percent of all local and state tax revenues collected in Oklahoma.

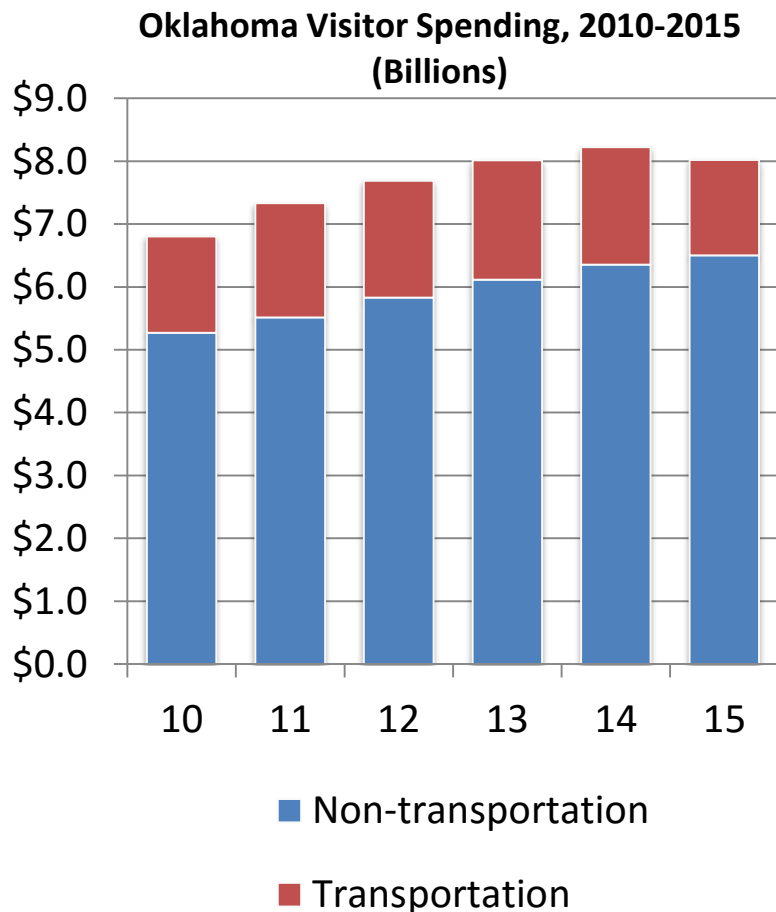
# Oklahoma Travel Spending, 2010-2015



- Oklahoma travel spending grew from \$7.4 billion in 2010 to \$8.6 billion in 2015, an increase of nearly 17%.
- Important to note: the 2.1% decline from the previous year (2014) was largely due to a decline in the price of motor fuel.



# Oklahoma Visitor Spending

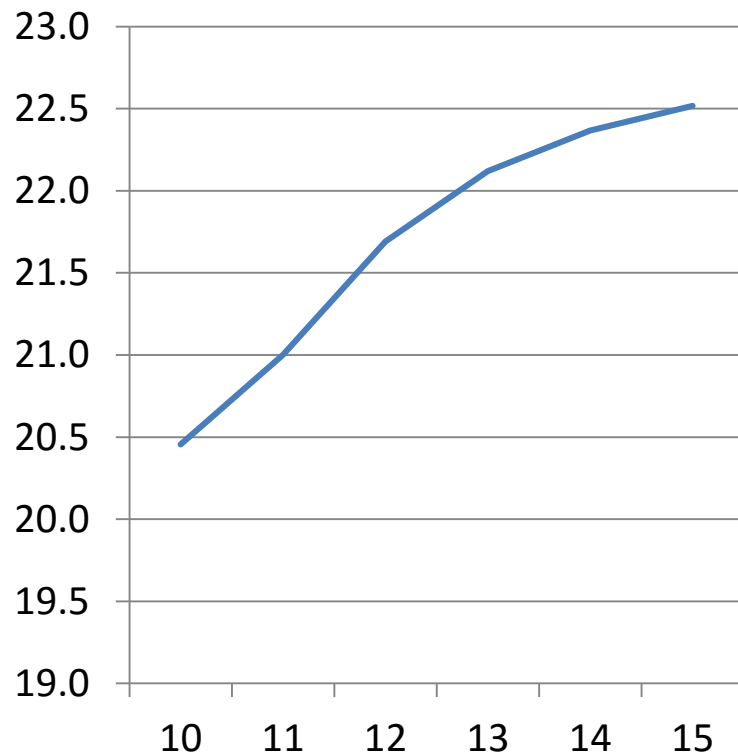


Non-transportation visitor spending (not including motor fuel and visitor air transportation) increased by 2.4% over 2014.

Since 2010, non-transportation visitor spending has increased by an average of 4.3% per year.

# Overnight Visitor Volume, 2010-2015

**Overnight Person Trips (Millions)**

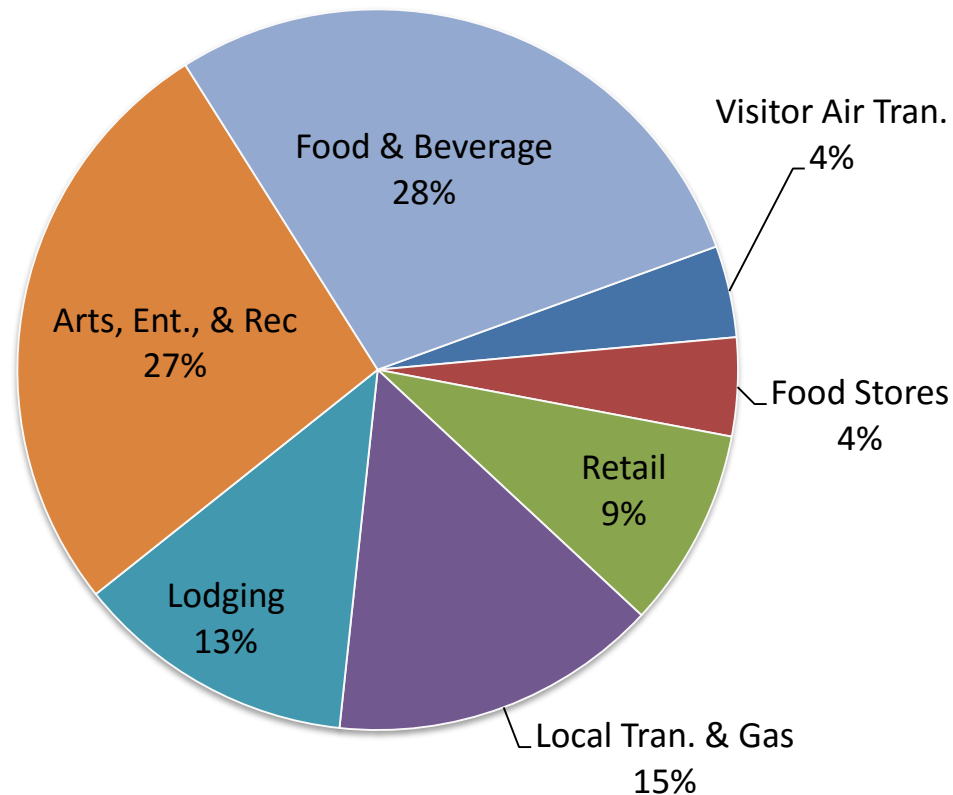


- Estimates of overnight trips and total nights spent are provided for both persons and travel parties.
- Overnight person trips have showed modest increases over the past five years from 20.5 to 22.5 million.

# Visitor Spending by Commodity Purchased

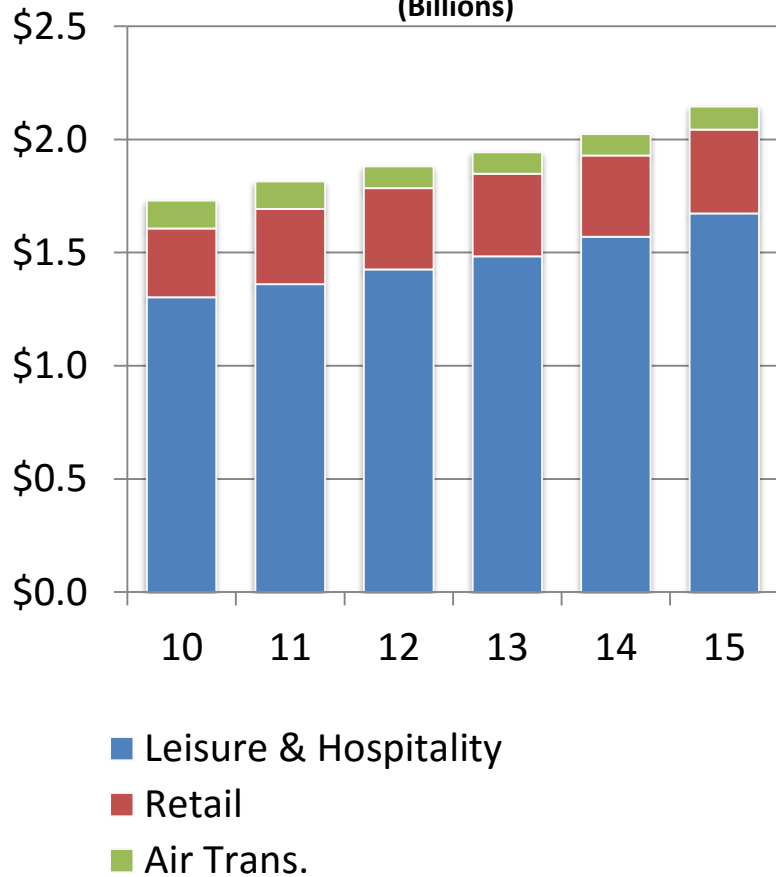
## Visitor Spending by Commodity, 2015

Total: \$8.02 Billion

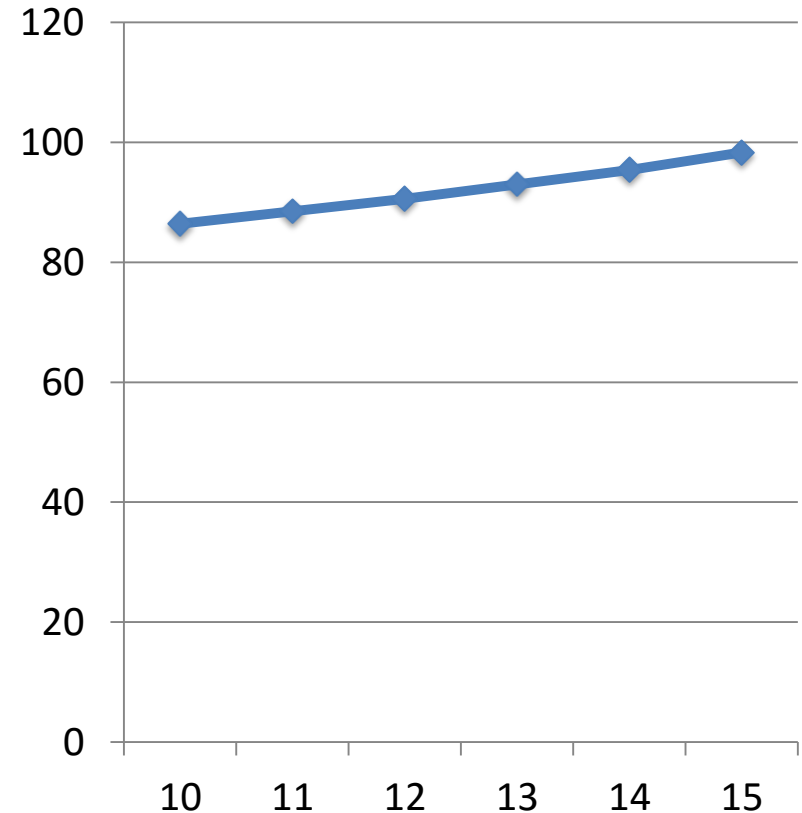


# Travel-Generated Earnings and Employment

**Travel-Generated Earnings, 2010-2015**  
(Billions)

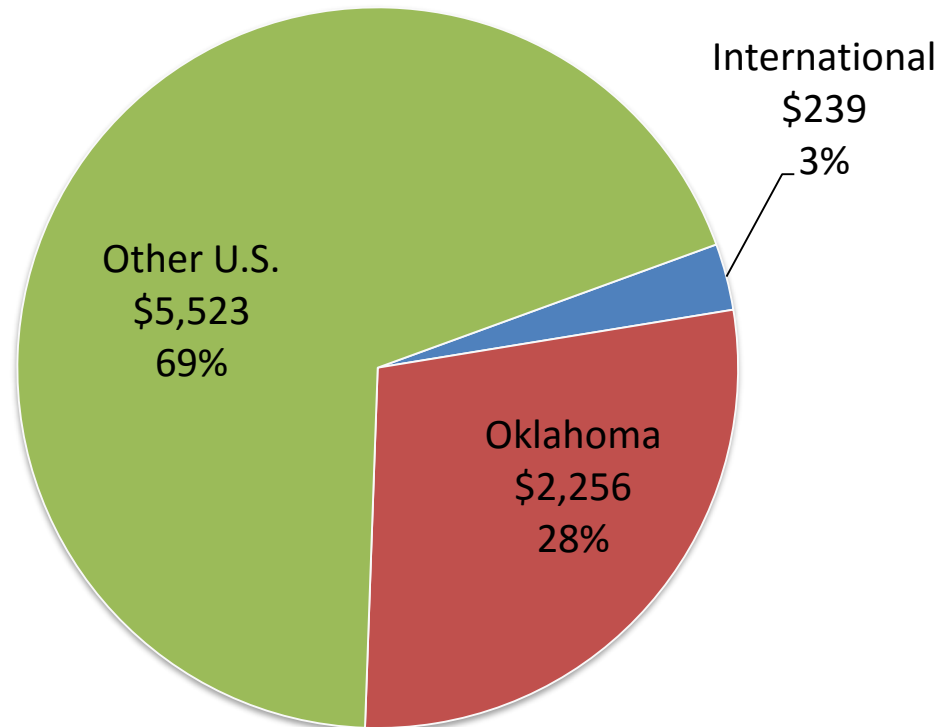


**Travel-Generated Employment, 2010-2015**  
(Thousands)



# Visitor Spending by Visitor Residence

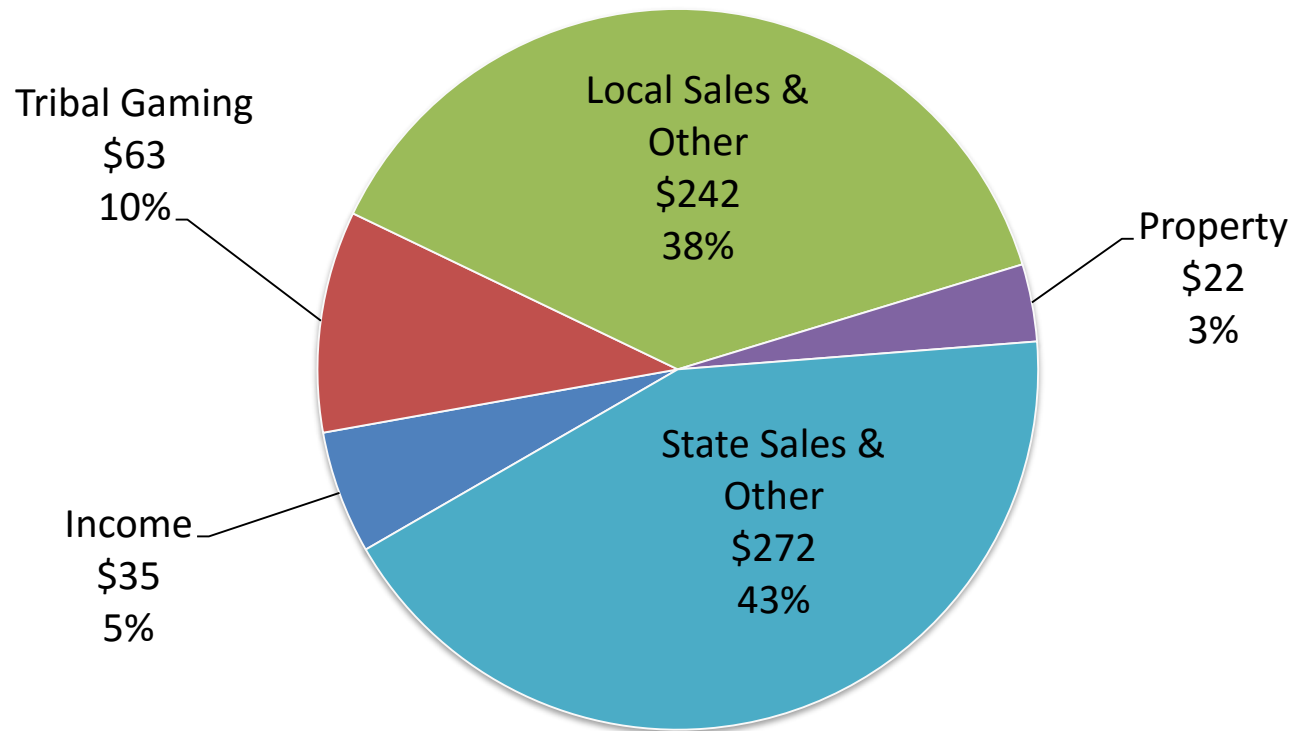
**Oklahoma Visitor Spending by Visitor Residence, 2015**  
(Millions)



Note: Allocation by visitor residence established with data provided by TNS, Inc. and Bureau of Economic Analysis statistics on personal consumption expenditures for Oklahoma (most recent, 2012).

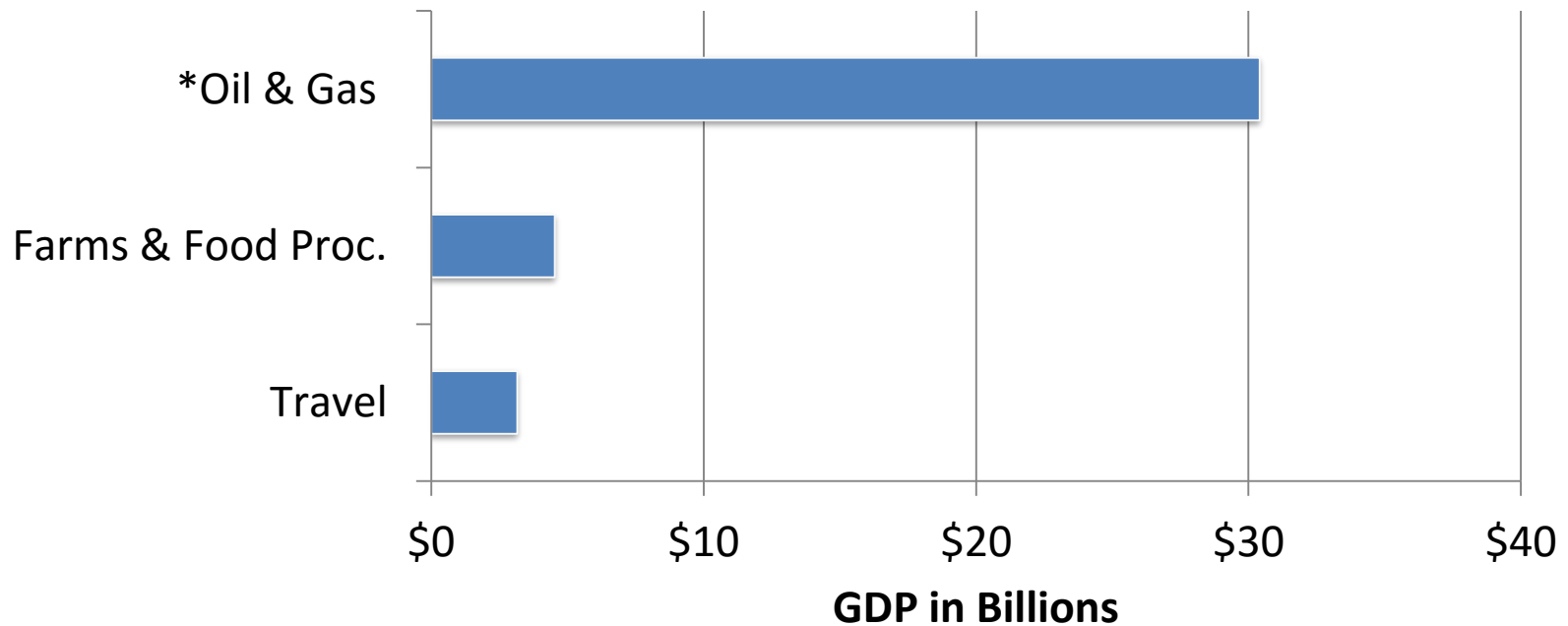
# Travel-Generated Government Revenue

**Local & State Revenue by Tax Category, 2015**  
(Millions)



# Gross Domestic Product

## GDP of Selected Oklahoma Export-oriented Industries, 2014



Sources: Dean Runyan Associates, Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates for 2014 calculated by Dean Runyan Associates.  
\*Oil & Gas includes extraction and petroleum and chemical manufacturing.

# Secondary Travel-Generated Impacts

Spending made by visitors to and through Oklahoma brings money into the communities in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-generated dollars creates what are known as indirect and induced impacts.

Direct travel-generated employment and earnings impacts are found in the following industry groups:

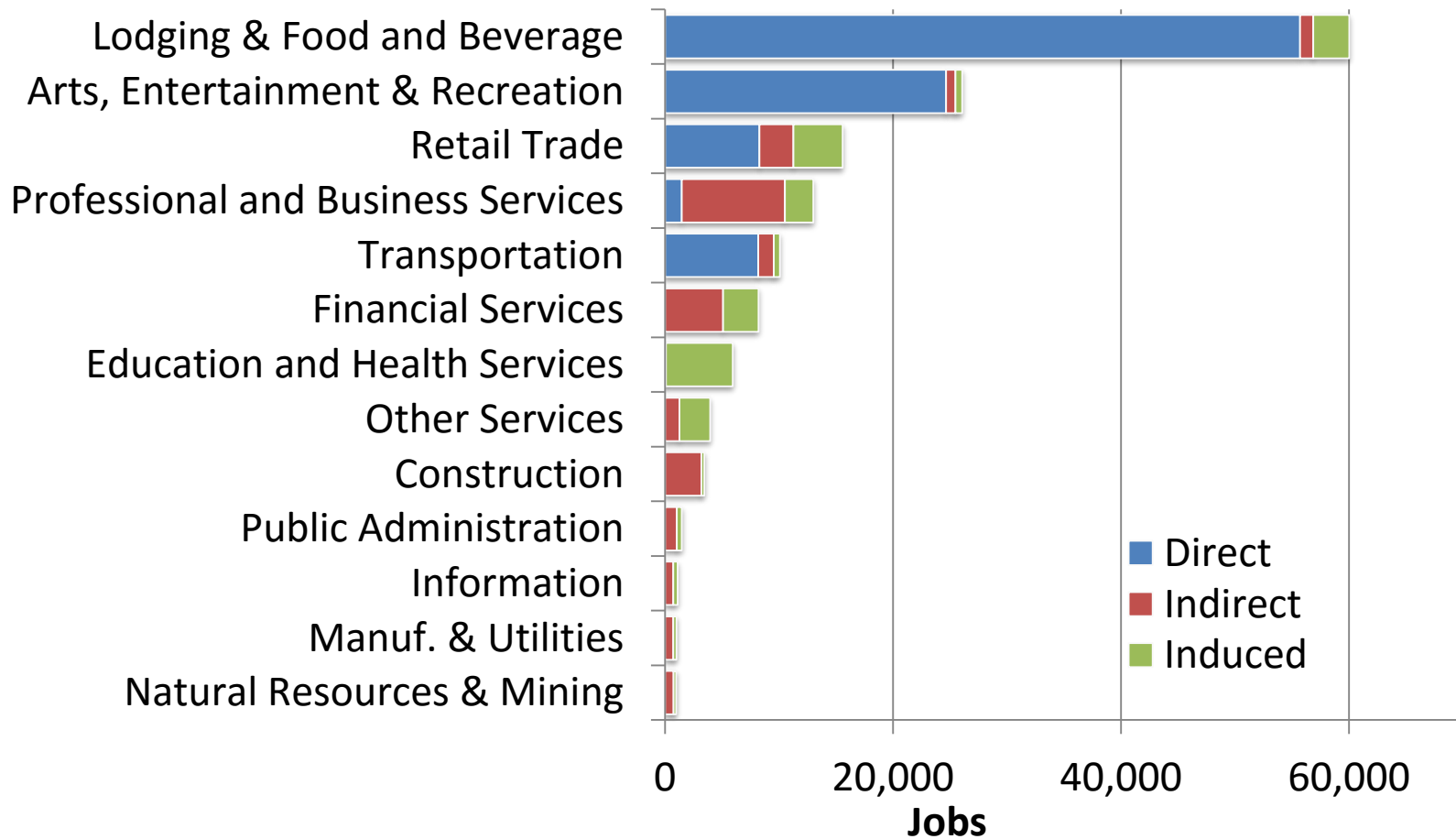
- Lodging & Food and Beverage
- Arts, Entertainment, and Recreation
- Retail Trade
- Transportation

Indirect impacts represent the employment and earnings that results from purchases made by travel industry business from other businesses throughout Oklahoma.

Induced impacts represent the employment and earnings that result from purchases made by travel industry employees for food, housing, transportation, recreation, and other goods and services.



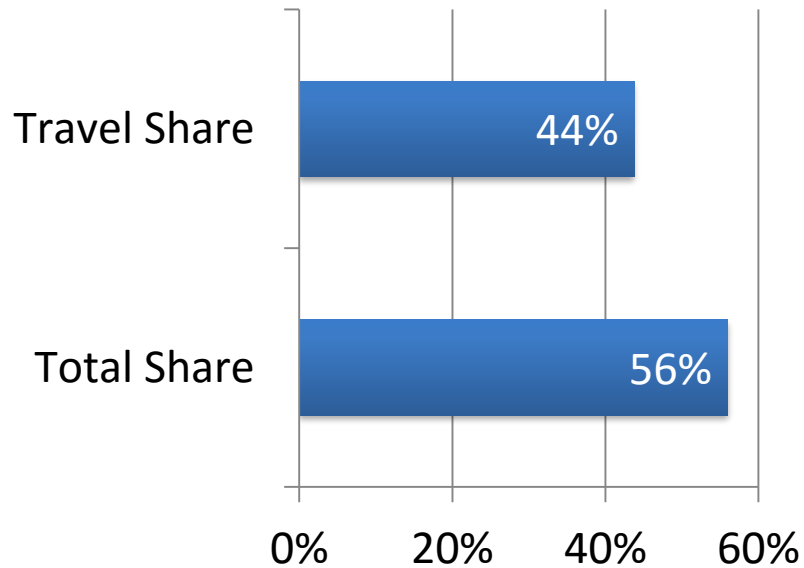
# Travel-Generated Secondary Employment by Industry, 2015



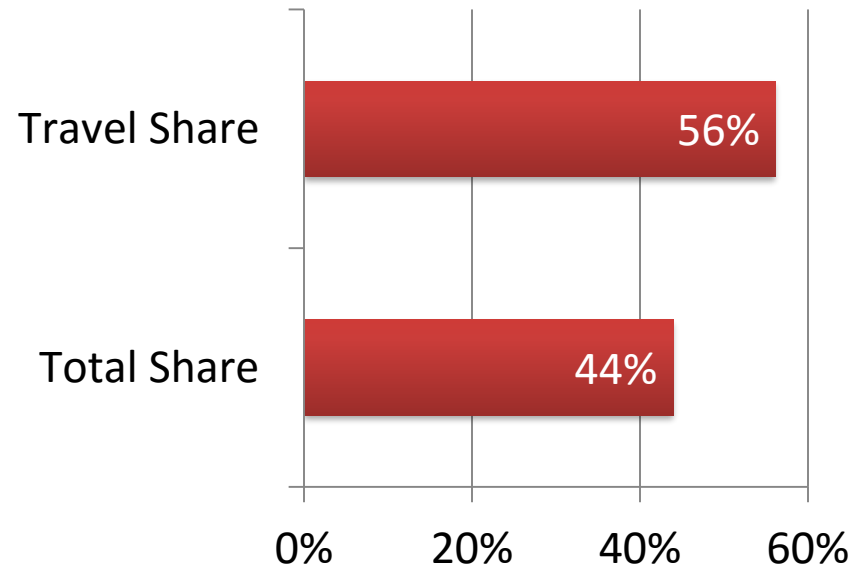
Source: Dean Runyan Associates using IMPLAN

# Travel Industry Benefits All Areas of the State

## Five Largest Counties

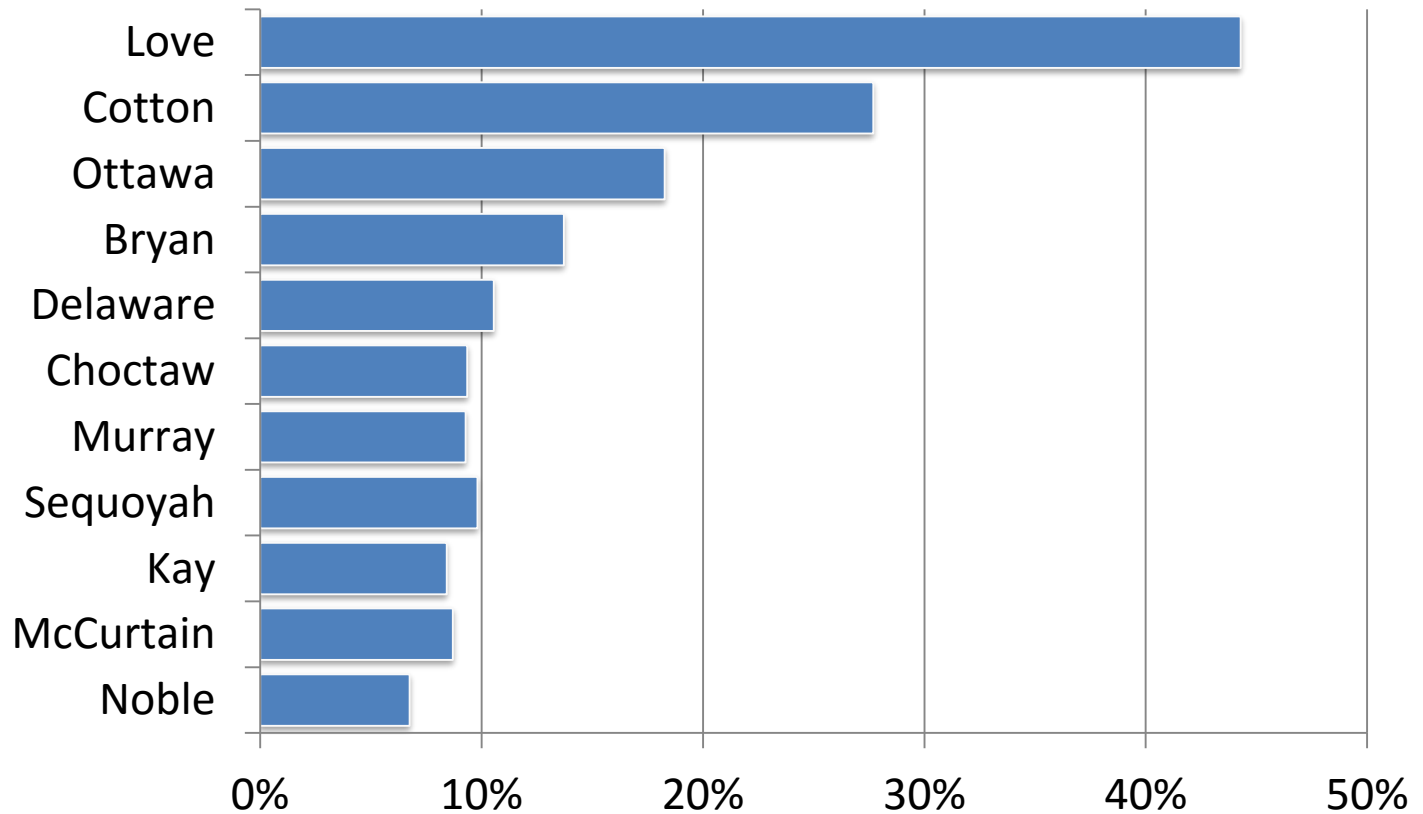


## All other Oklahoma Counties



# Travel Employment Share, 2015

## Counties with more than Eight Percent Travel Employment Share



# Oklahoma Travel Impact Highlights (review again)

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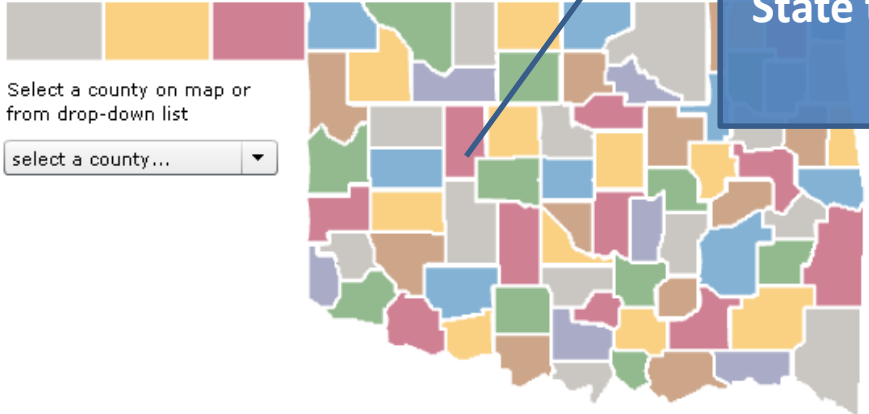
# Interactive Application

## OKLAHOMA TRAVEL IMPACTS

Access data by clicking on county map, or switch tab for district, region or state map

You now have direct access to travel impact data, as reported in the Economic Impact reports, prepared annually by Dean Runyan Associates, Inc. for the Oklahoma Tourism Office. The Economic Impact Report includes direct economic impacts of travel to and through Oklahoma and its counties in the following categories: direct travel spending, direct earnings, direct employment and direct tax receipts.

Select County



Select a county on map or from drop-down list

select a county... ▼

Select House or Senate District

Select State

Pick a County, District or State to view/download data

### Direct Travel Spending

Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.

The earnings (wage and salary) from the travel-related activities and owners of businesses that are attributable to travel expenditures.

### Direct Employment

Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.

### Government Revenues

Tax receipts collected by state, counties and municipalities, as levied on applicable travel-related purchases, including lodging, food and beverage service, retail goods and motor fuel.

### Overnight Visitor Volume and Average Overnight Spending

County and statewide estimates of visitor volume and average spending (which includes both domestic and international visitation) for overnight visitors. This data is not available for counties with high proportion of gaming. In the case of trips, the sum of counties are greater than the statewide estimate.

PDF Downloads 

State and Counties Report  
House Districts Report  
Senate Districts Report

Dean Runyan Associates

This web application was prepared for  
Oklahoma Tourism & Recreation Department  
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OKLAHOMA

# Interactive Application

## OKLAHOMA TRAVEL IMPACTS

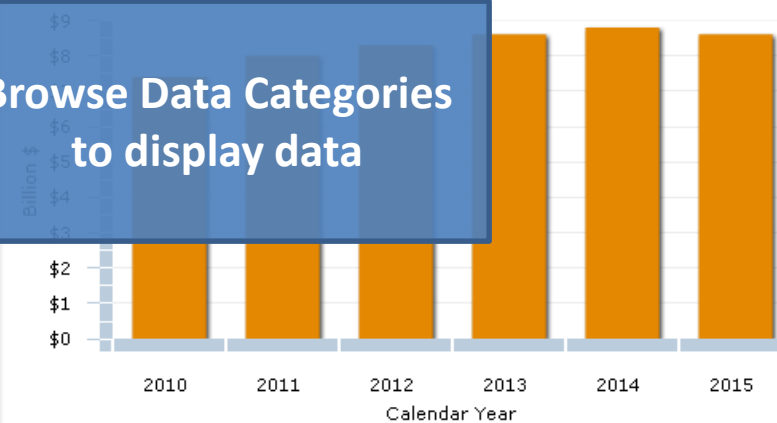
View Definition of Terms

You selected: **Oklahoma State**

Change Selection

- ▼ Oklahoma Travel Impacts
  - ▼ Total Direct Travel Spending
    - All categories (select year below)
    - CY Totals
    - Visitor Spending at Destination
    - Other Travel
  - ▼ Visitor Spending
    - CY Totals
      - ▶ by Type of Accommodation
      - ▶ by Commodity Purchased
    - ▶ Total Direct Earnings
    - ▶ Total Direct Employment
    - ▶ Government Revenues
  - ▶ State Overnight Visitor Volume
  - ▶ State Average Overnight Spending

**Total Direct Travel Spending  
Oklahoma State**



Browse Data Categories to display data

Year	Billion \$	Change from prior year
2015	\$8.6	-2.1%
2014	\$8.8	2.6%
2013	\$8.6	3.7%
2012	\$8.3	4.1%
2011	\$8.0	7.6%

# THANK YOU

Dean Runyan Associates appreciates the opportunity to work with Oklahoma Tourism and Recreation Department.

Special thanks are due to Kim Caplinger, Director, Public Policy & Research, for her support and assistance.

