

Calendar Year 2016 – Oklahoma TravelsAmerica Visitor Profile Report

March 27, 2018

TNS: 212 246238

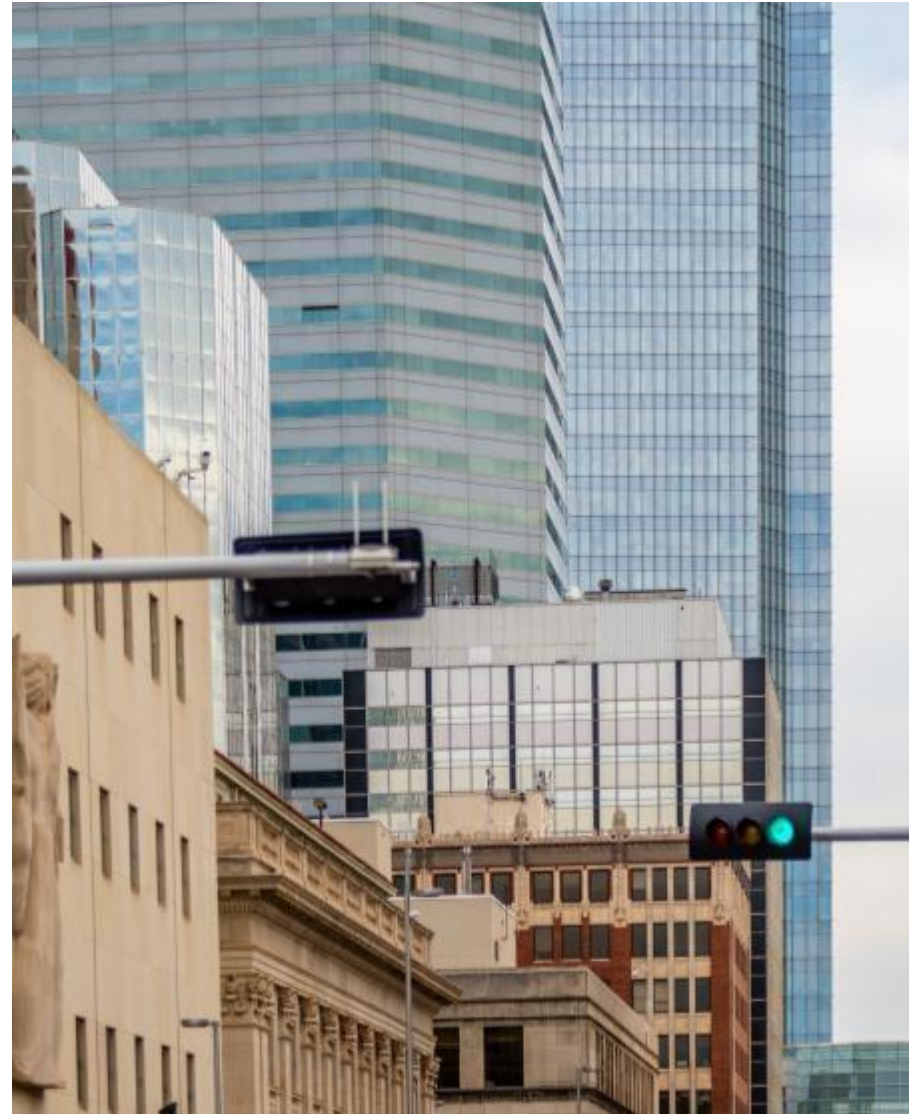


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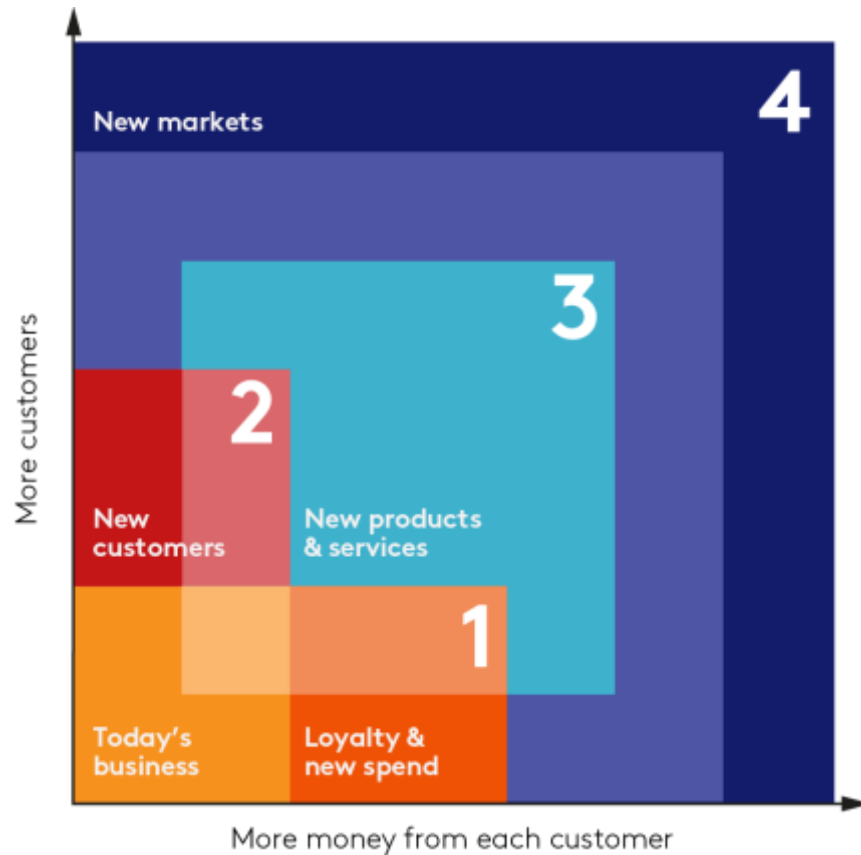
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Growth Summary



TNS Growth Map



Your business issues

- In 2015,* tourism (21.8 million visitors) contributed \$8.6 billion to Oklahoma's economy, generating \$634 million in local/state taxes and 98K direct travel-generated jobs, making it the third largest "export" in the state (after oil/gas and agriculture/food processing).
- To increase visitation and tourism revenue, the Oklahoma Tourism and Recreation Department profiles visitors to better select the best media, best messaging, and best markets:
 - From which to draw more potential visitors and entice current visitors to come more often to explore Oklahoma's entertainment/amusements, outdoor adventures, history/culture, sports, hunting/fishing, and music
- To advocate longer trips that would add to lodging and general tourism revenue.

Growth summary



Growth insights

- Oklahoma grew tourism in CY 2016, especially among in-state residents who like what they see -- “local” satisfaction levels climb.
- Those living in or traveling to border states remain the most viable source for adding visitors or extending trips to Oklahoma.
- More come to Oklahoma for entertainment and amusement than any other activity and they spend above average amounts, making them the most lucrative visitors.
- The next-largest group, Family/Friend/ Reunions, warrants less attention; they will likely visit regardless of Oklahoma Tourism and Recreation Department efforts and spend less than any other type.
- Other high-spending, but smaller, groups boost Oklahoma tourism revenue, notably young Sports/Recreation enthusiasts and relatively older Art/Culture and Parks/Gardens aficionados.
- Visitors most commonly rely on their own experience to plan trips, but a third of them turn to internet search engines and social media to gather information, making Oklahoma’s online presence effective and essential for reaching potential visitors.
- Separately, the website’s “Come See for Yourself” headline highlights activities that can build synergy throughout various media.

Precise plans for growth

- Maintain focus on communications in-state and in larger nearby Western/Midwestern markets within driving distance, especially Texas, as advertising budgets allow.
- Highlight messaging on activities that attract younger visitors and larger spenders, particularly the many sports and recreation options available in the state.
- Entice relatively older and lucrative visitors with the vast array of parks/beautiful scenery and Oklahoma’s unique history/culture.
- Continue to promote the variety of things to do (gaming, festivals/ events, music, family options, etc.) that already successfully attracts visitors.
- Encourage residents and Family/ Friend/Reunion visitors to use social media as ambassadors to bring other potential visitors to “come see Oklahoma for themselves.”

Purposes/primary objectives of research

Brand/History

Oklahoma Tourism & Recreation (OTRD)



- 3rd report for OTRD
- Continuous online data collection via Kantar TNS nationwide syndication

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:

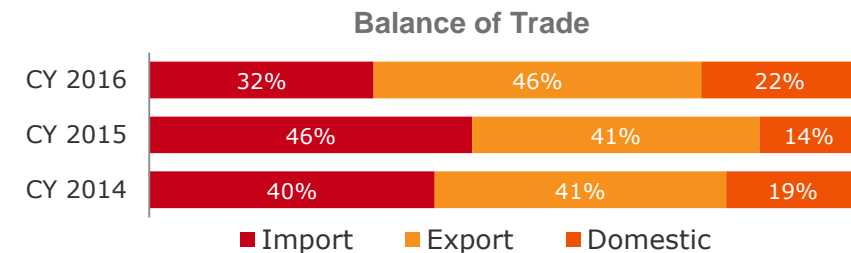
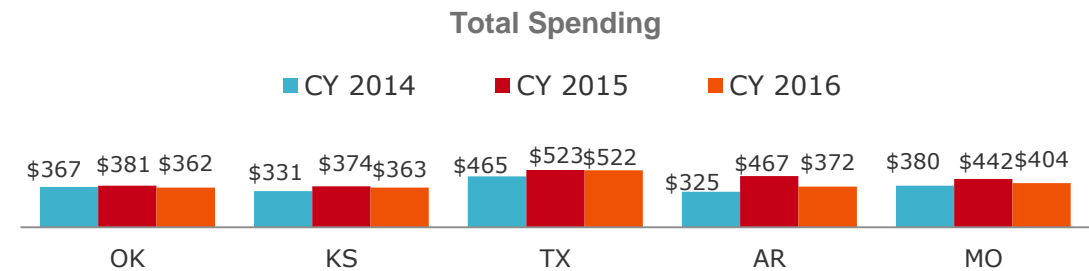
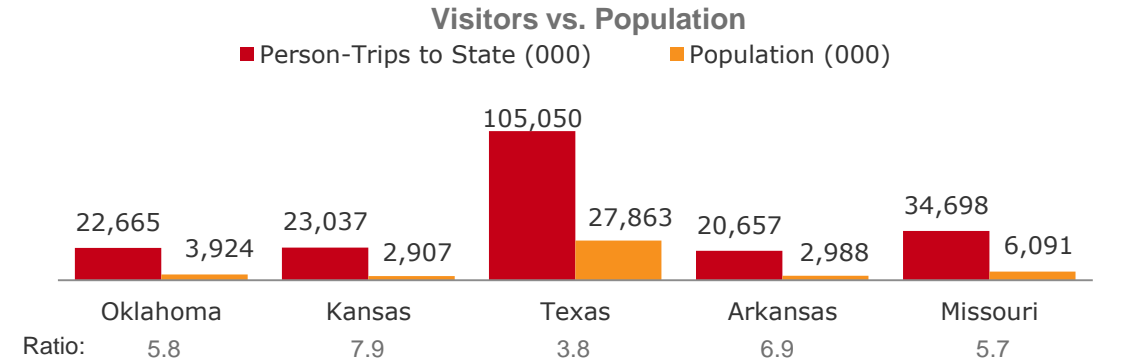
- Export/Import spending (non-OK residents spending in OK vs. OK residents traveling elsewhere)
- “Domestic spending” (OK residents vacationing within the state)
- Understanding the most lucrative segments: entertainment/amusement, families, art/culture, and sports/recreation

2 Executive Summary



Tourism = Important to Oklahoma

- Financially, tourism brings revenue, not only directly to industry businesses, but in taxes (sales/lodging/etc.). “Visitors per person” helps to show the relevance of tourism to Oklahoma. The ratio, with 6 visitors per person, shows Oklahoma near the center of its competitors.
- Oklahoma visitors spend at competitive levels. All of these states post visitor spending levels similar to a year ago, except Arkansas slips more than others as it fails to maintain its gain in 2015.
- Oklahoma “balance of trade” notably improves, both with exports and with “domestic” spending, suggesting the state is improving communication of its features enough to encourage both residents and non-residents to spend more time and \$\$\$ in Oklahoma.



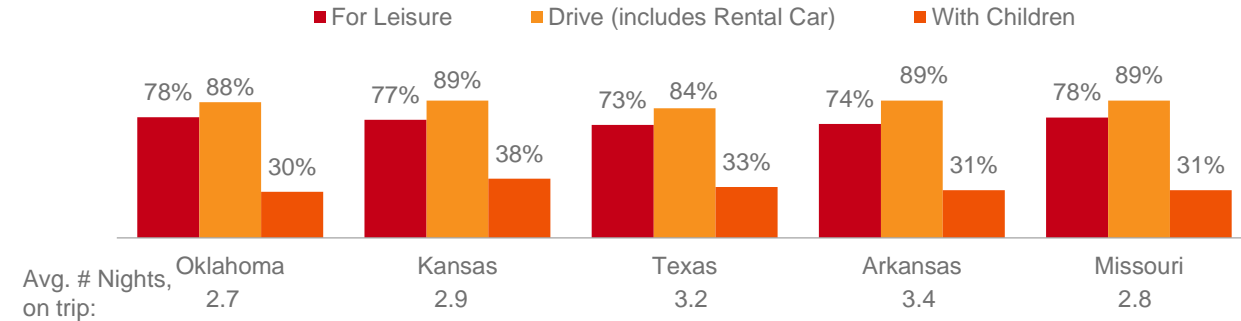
Import represents \$ leaving OK (residents traveling elsewhere)
 Export represents \$ coming into OK (non-residents to OK)
 Domestic represents \$ staying in OK (residents traveling in OK)

Why visitors come to Oklahoma; what they like

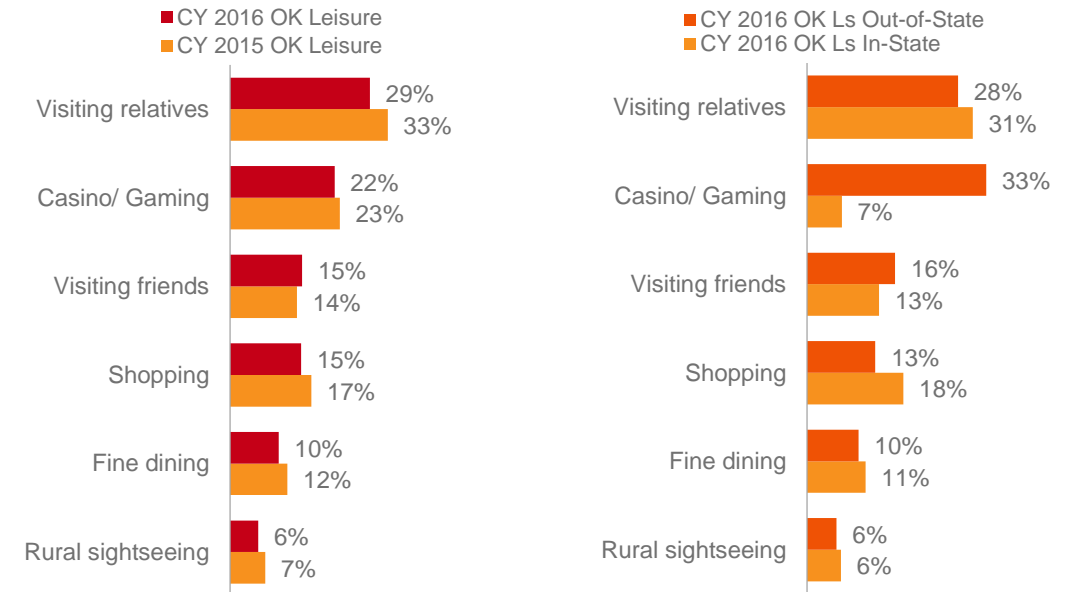
- Similar to competitive states, Oklahoma primarily hosts leisure visitors, most visitors drive, and the average stay hovers near 3 nights. About a third of visitors to each of these states bring their children, a bit less for those coming to Oklahoma; somewhat more for Kansas visitors.

- Both in- and out-of-state visitors primarily visit relatives, 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

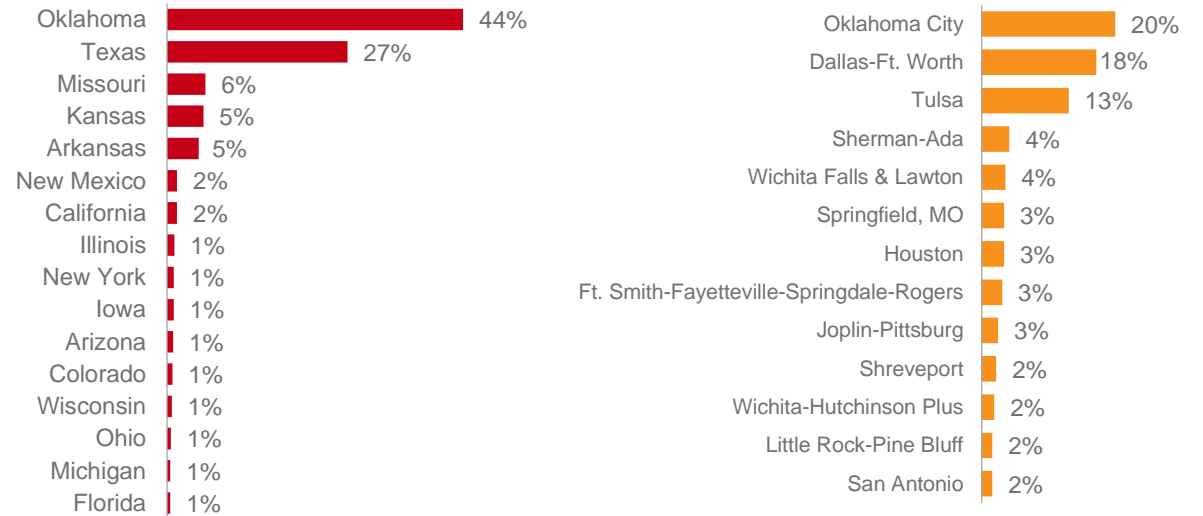


From where they come ... to where they go

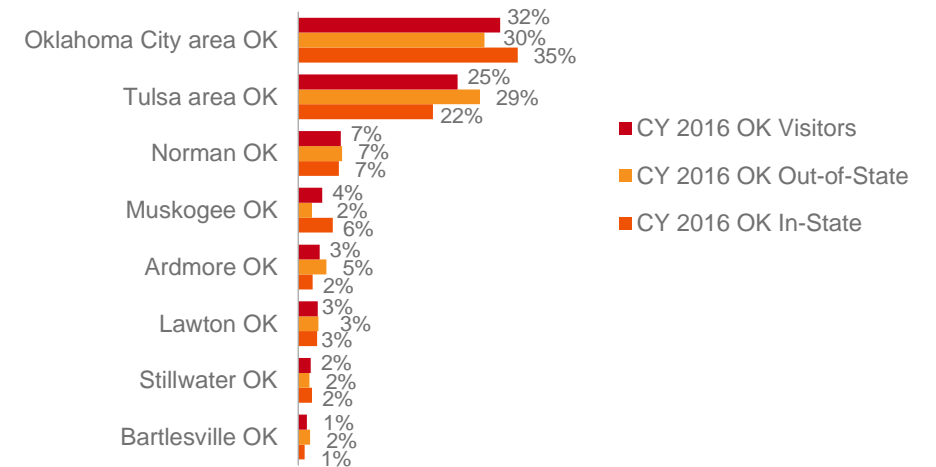
- Oklahoma primarily draws visitors from within its borders and Texas, with a boost from Missouri, Kansas, and Arkansas. Similar to many other destinations, key source markets often border Oklahoma.

- 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 2016) ...

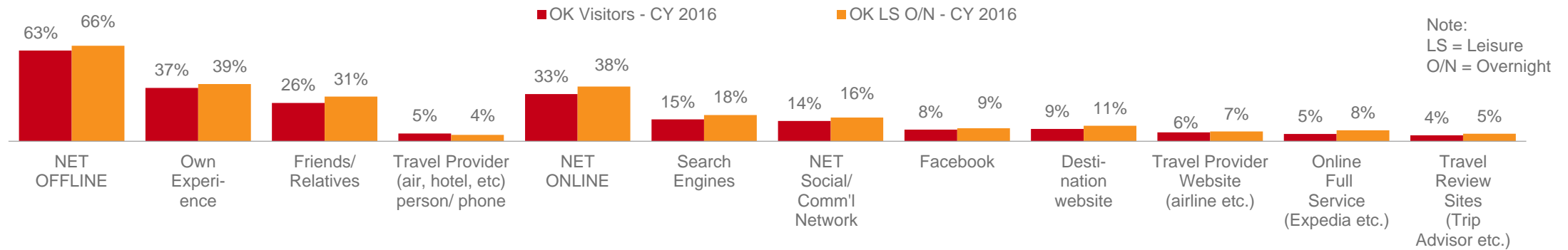


To Where...



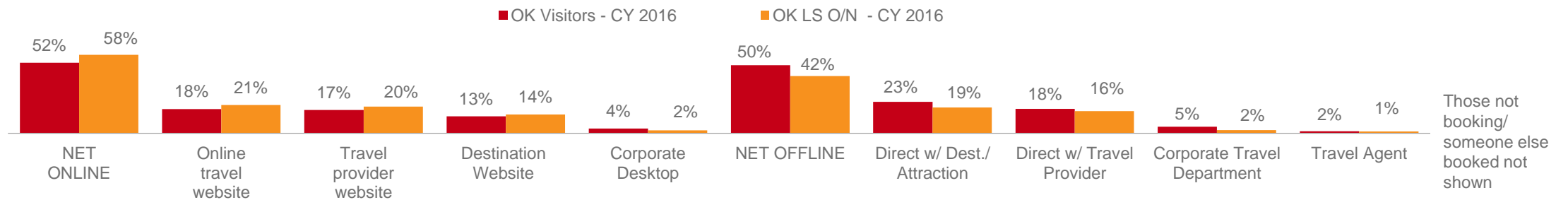
For planning trips, Oklahoma visitors most commonly use their own experience or word of mouth (either via friends/relatives or social media); many use search engines as well

Planning (5%+)



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

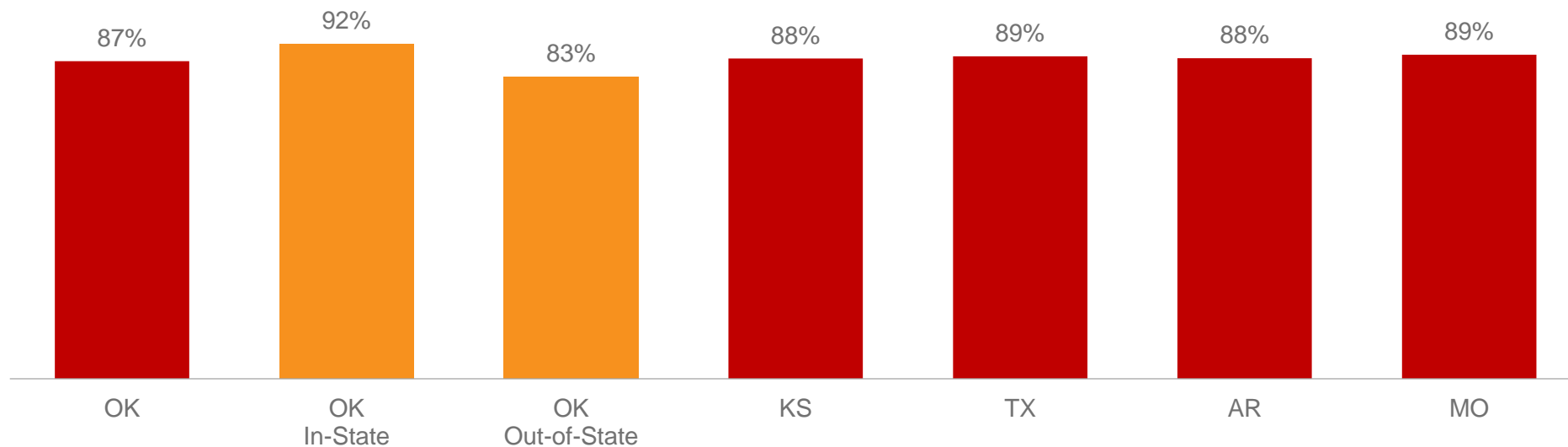
Booking (5%+)



Oklahoma sends visitors home happy

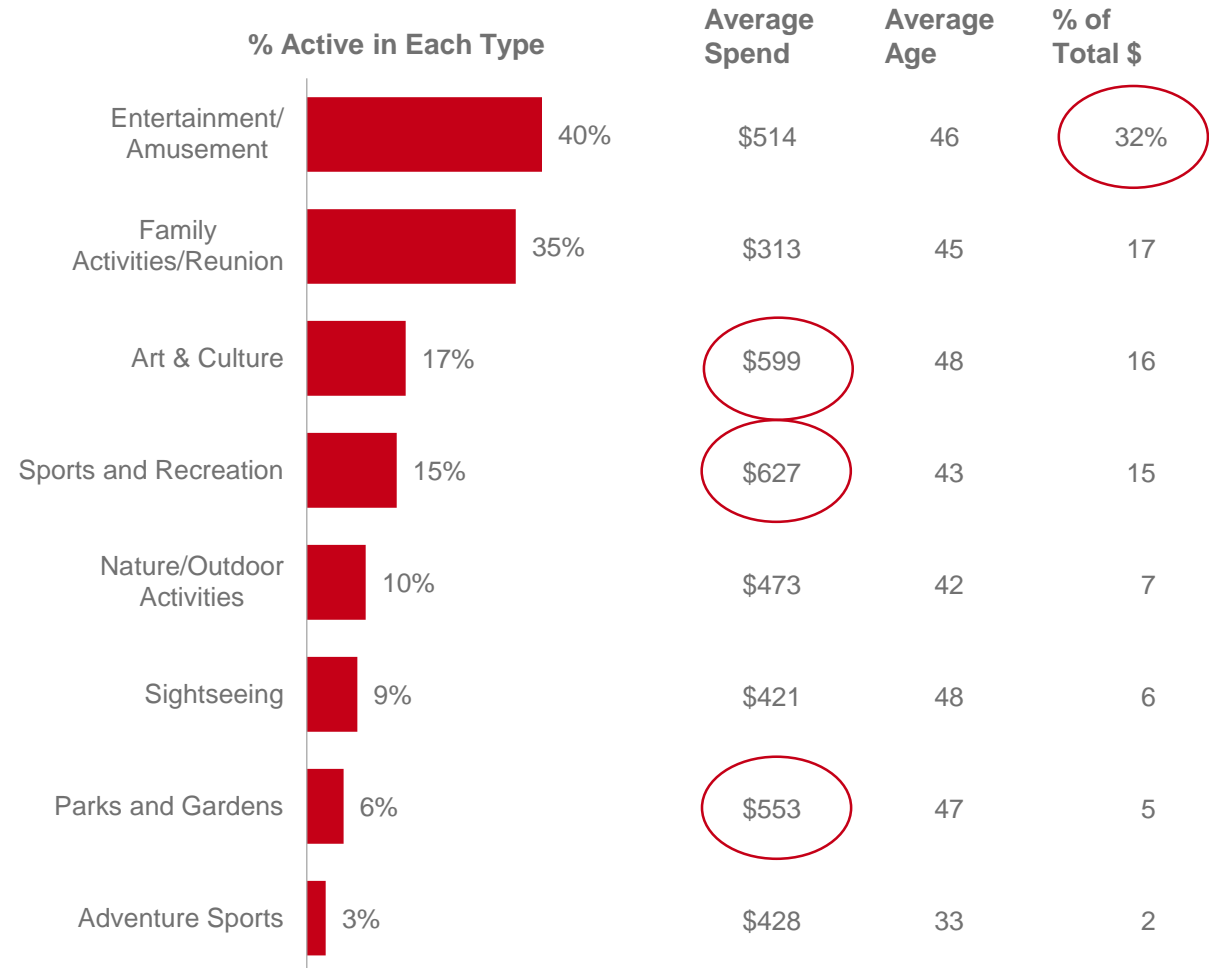
- Very similar to its primary competitors, Oklahoma satisfies visitors, with residents (who likely have greater familiarity with the state) noting stronger satisfaction than non-residents.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2016)



Sizing and revenue by activity engaged

- Those choosing *entertainment/amusement* (particularly gaming) activities represent the most lucrative segment – the largest share of participants with moderately high spending.
- The *family/reunions* segment draws almost as many participants as *entertainment/amusement*, but the group spends the least.
- The biggest spenders tend to be those taking at least some interest in Oklahoma’s history and outdoor features: *art/culture (includes museums and history)*, *sports and recreation*, or *parks/gardens*.



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

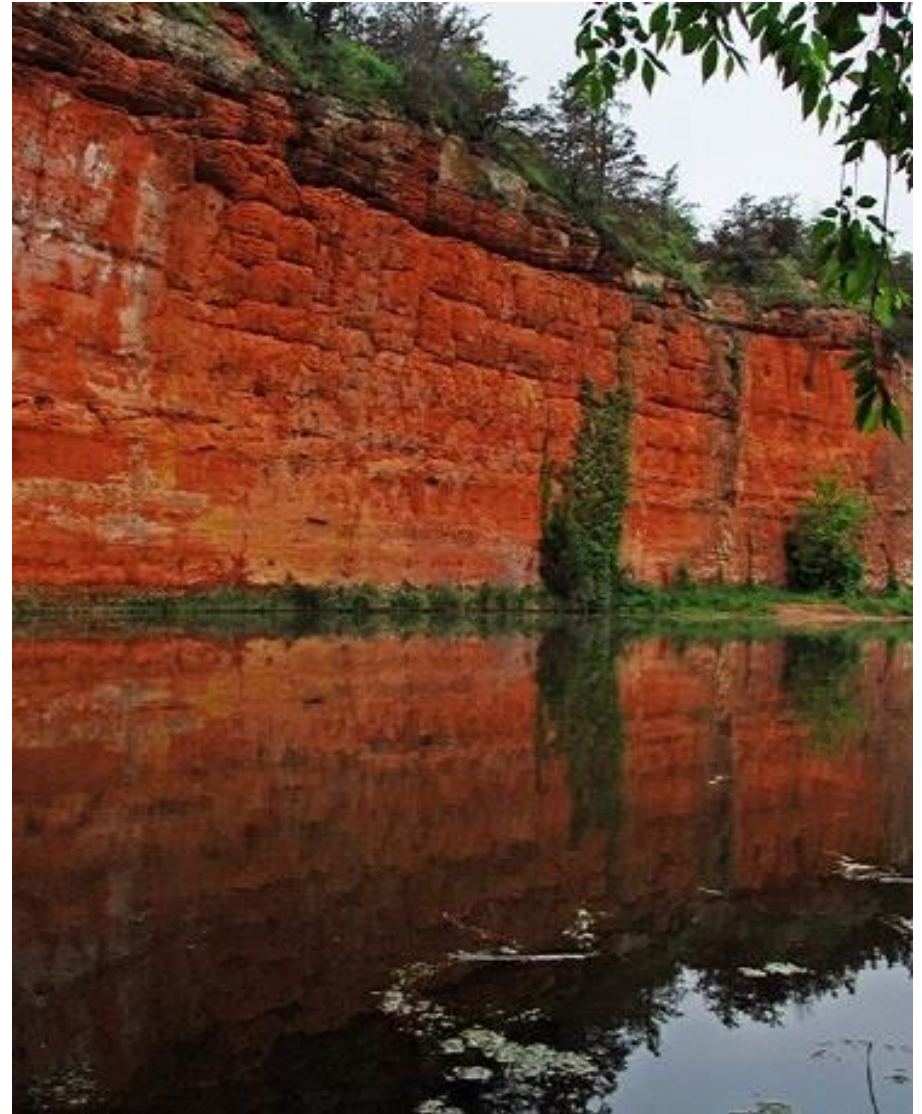
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Detailed Results



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Share of Visitors



Oklahoma hosts over 22 million visitors annually

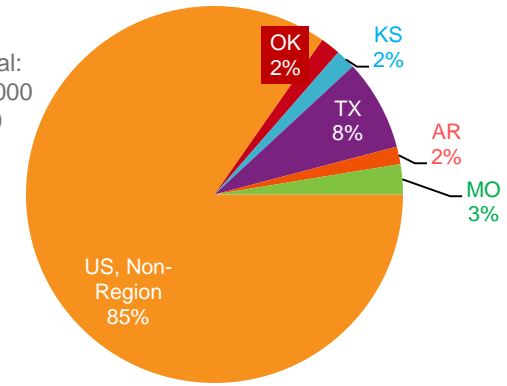
Person-trips; trips = 50+ miles from home (one-way) or spent 1+ nights away

Market Overview:

- OK visitors make up about 2% of total US travel
- OK visitor volume climbs while total US volume slips
- Another viewpoint shows “visitors vs. residents.” Tourism and business travel provide substantial revenue to the state (almost 6 visitors per resident).

Visitation – % of Person-Trips: OK + Four Competitive States

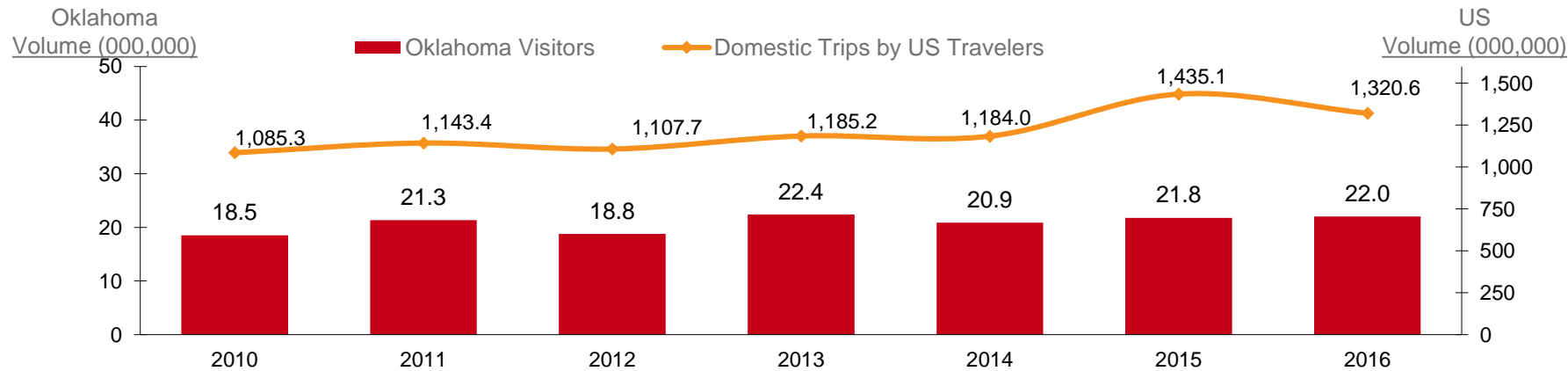
Person-Trips Total:
US = 1,320,548,000
OK = 22,016,000



Travel and Tourism Impact

State	Population - 2016 estimate; Census (QuickFacts)	Number of US Visitors to OK in CY 2016
Oklahoma	3,923,561	22,016,000

Market History:



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

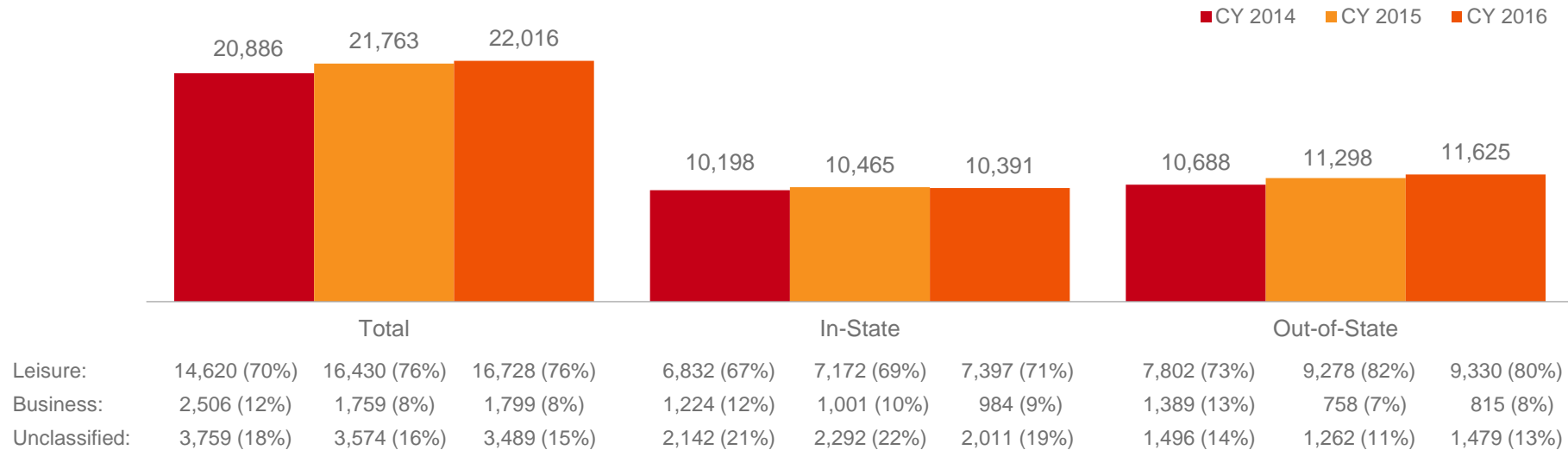
2016 Total US (Domestic) and OK = 3-year moving average

Leisure dominates travel to Oklahoma, especially for out-of-staters

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

- A slight, and steady, rise in out-of-state visitors offsets a slight dip in in-state visitors in CY 2016.

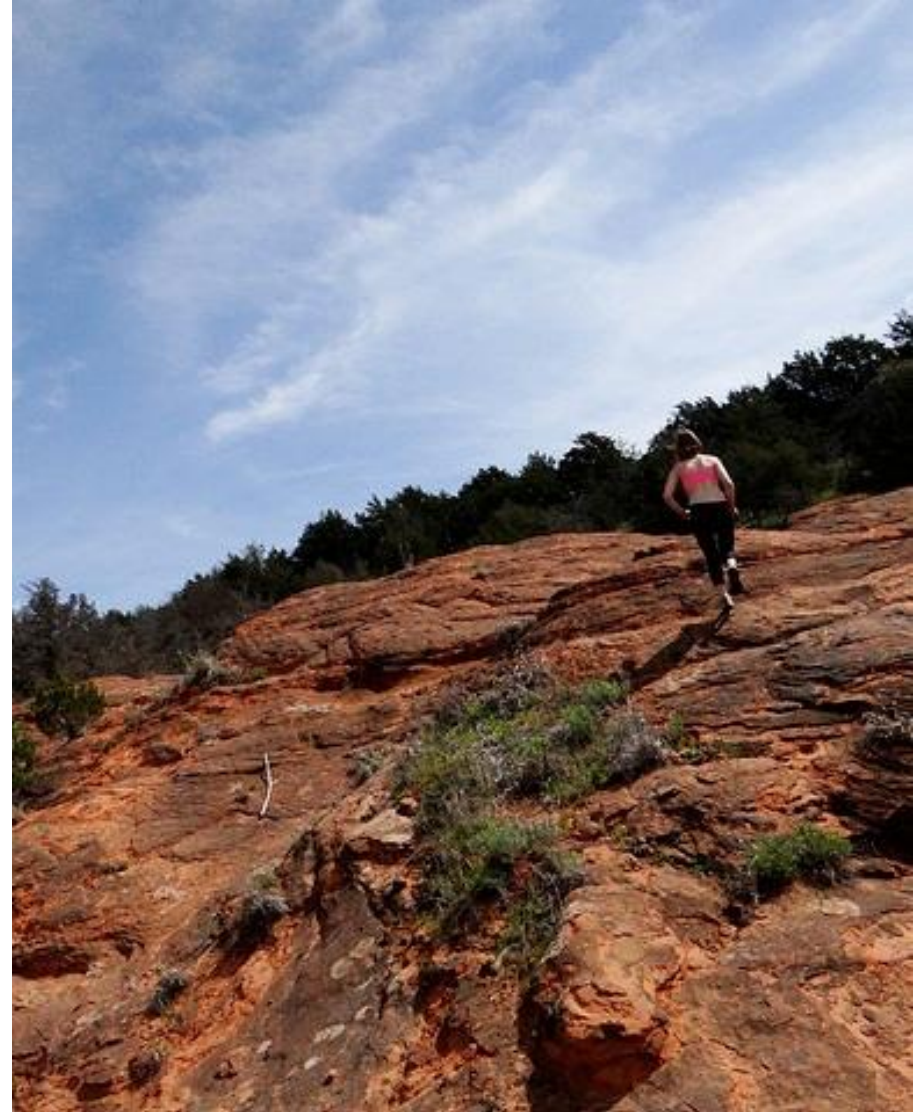
Visitation – Person-Trips (000): Oklahoma Visitors



Q4a. Please indicate US state(s) visited

2016 OK = 3-year moving average

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Trip Purpose/Source of Visits/Timing

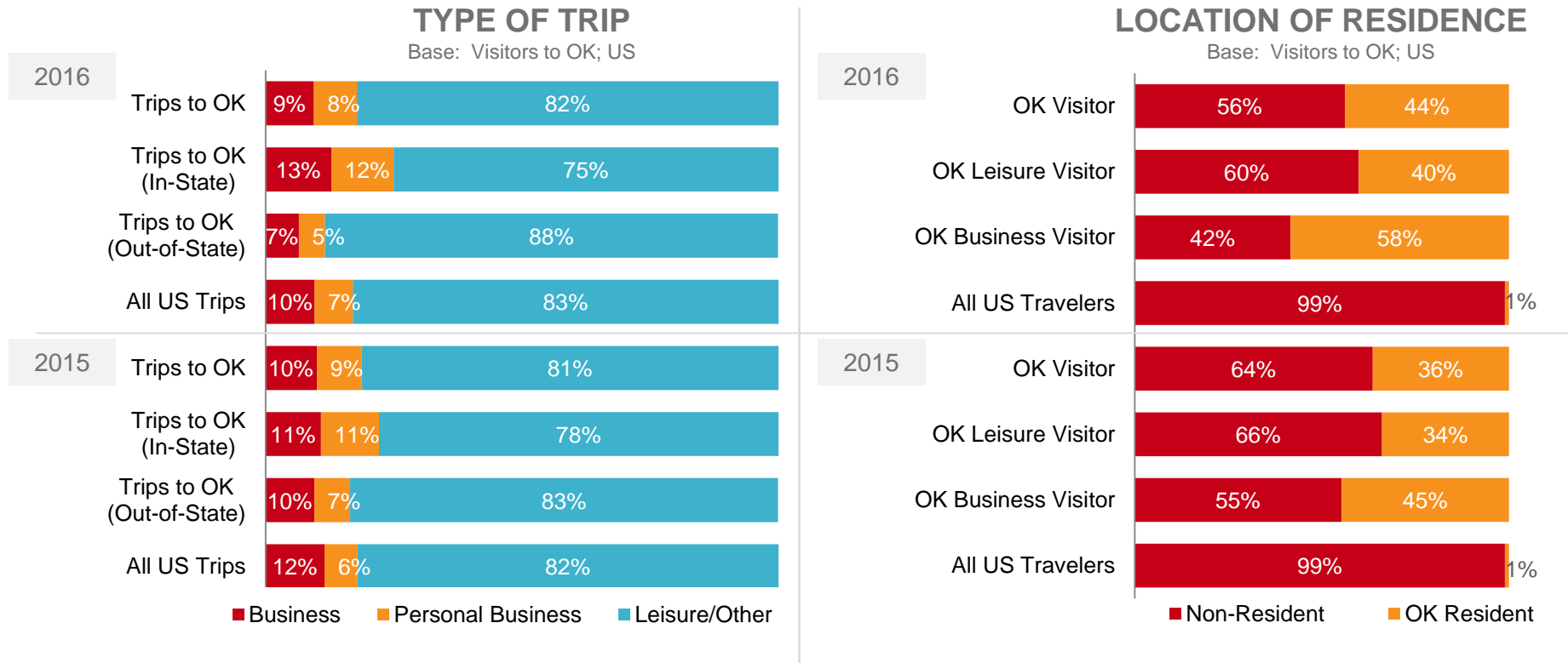


Visitors usually visit Oklahoma for leisure ...

- However, a notable share (9%) comes for business
- Out-of-state residents represent more than half of Oklahoma leisure visitors; business visitors more likely live in-state.

Trip/Visitor Characteristics

% of Visitors to State



Q4a. Please indicate US state(s) visited

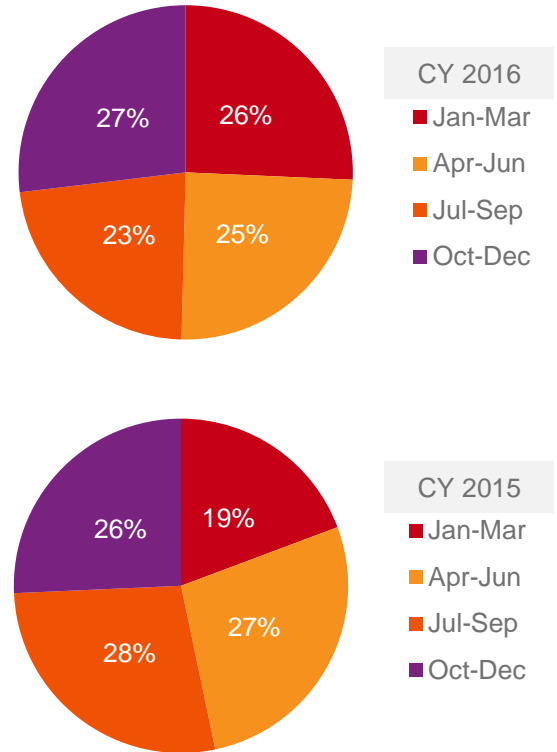
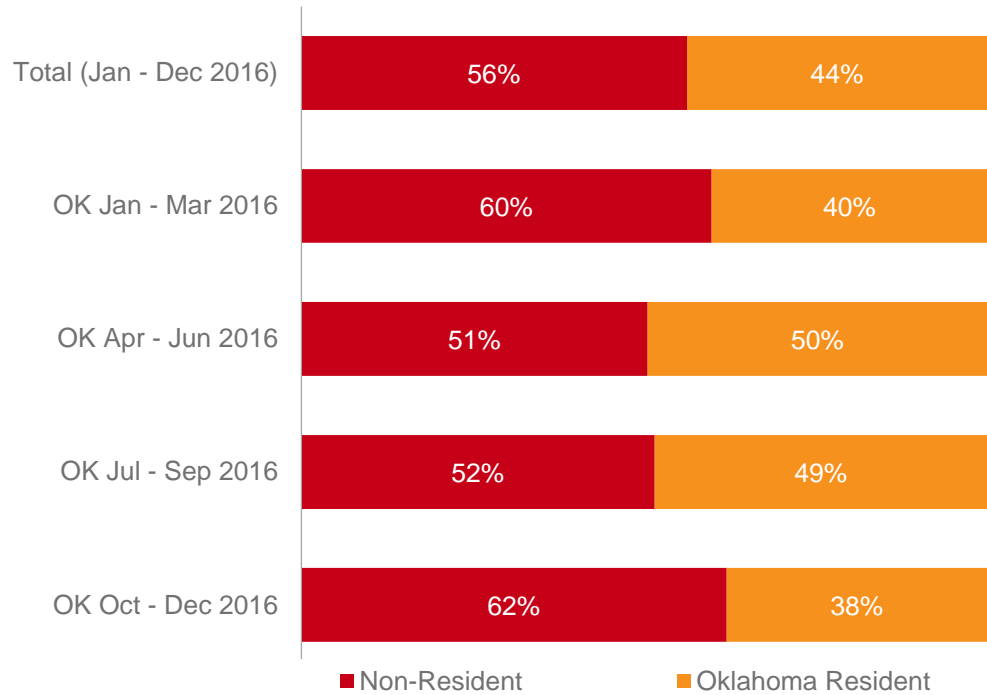
Panel: Residence of visitors (Household Level)

Visitation tends to be fairly steady throughout the year

(23% - 27% by quarter)

SOURCE of Oklahoma VISITORS by QUARTER

Base: Oklahoma Visitors

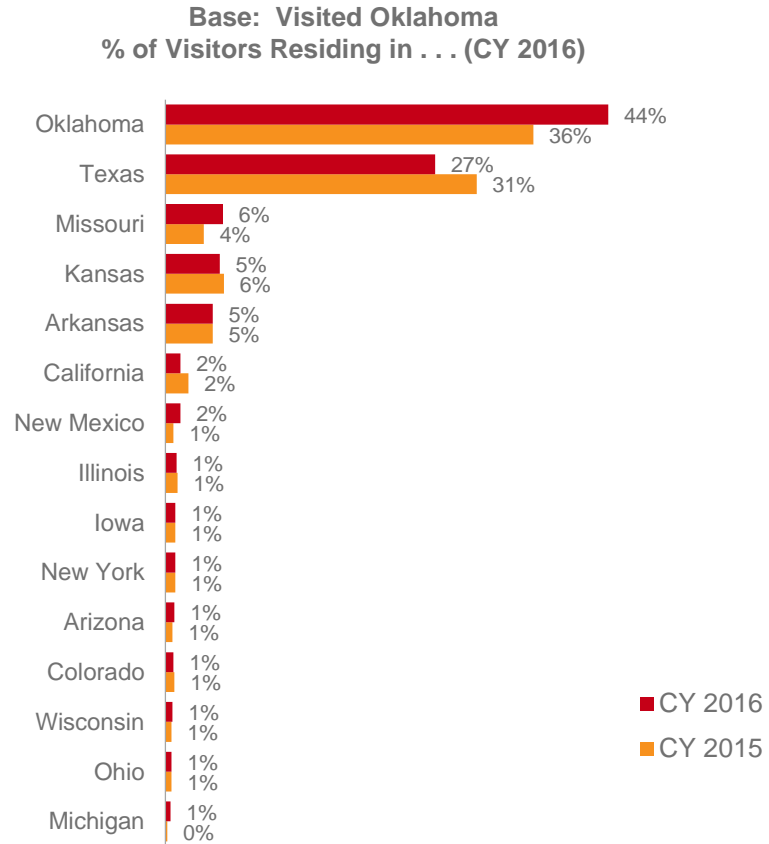


Panel: State/DMA residence of those who visited Oklahoma (Household Level)

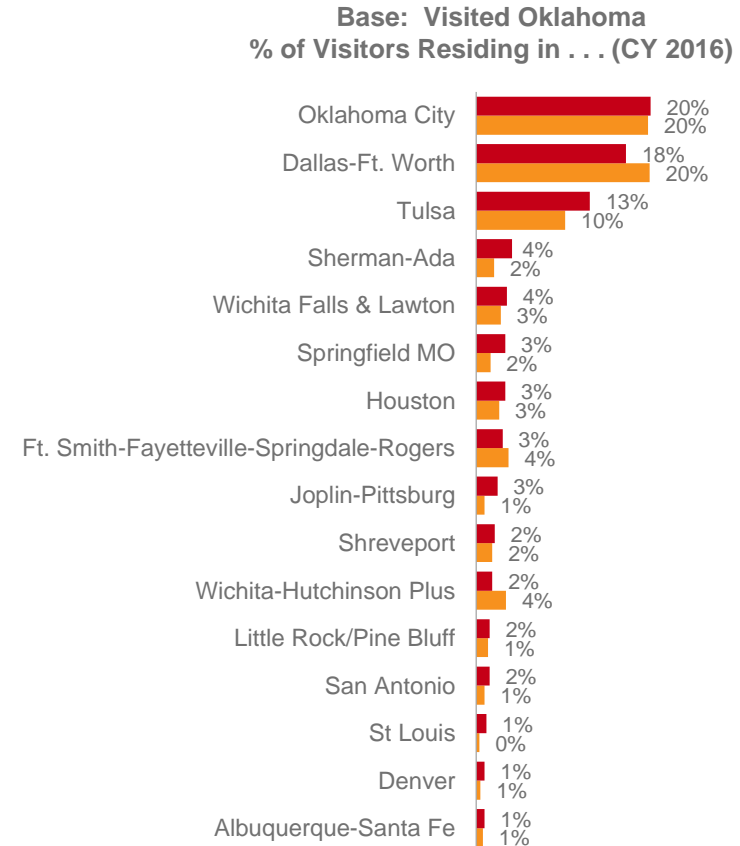
Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)

Neighboring Texas dominates 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

- With most visitors living in Oklahoma or a neighboring state, the trip decision occurs more spontaneously than for US travelers overall.

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2016	OK Visitors Total CY 2014	OK Visitors Total CY 2015	OK Visitors Total CY 2016	OK Visitors Leisure O/N* CY 2016	OK Visitors Leisure Day Trip CY 2016	OK In-State Visitors CY 2016	OK Out-of- State Visitors CY 2016
Considered								
Within Two Weeks	32%	37%	36%	35%	25%	50%	48%	28%
2 – 4 Weeks	16	17	16	18	20	12	19	17
1 – 3 Months	19	17	17	20	23	15	16	22
3+ Months	34	30	31	27	33	23	17	33
Decided								
Within Two Weeks	40%	46%	45%	46%	38%	60%	60%	38%
2 – 4 Weeks	17	17	17	17	19	10	14	18
1 – 3 Months	18	15	16	17	19	13	13	19
3+ Months	25	23	22	20	24	17	12	25

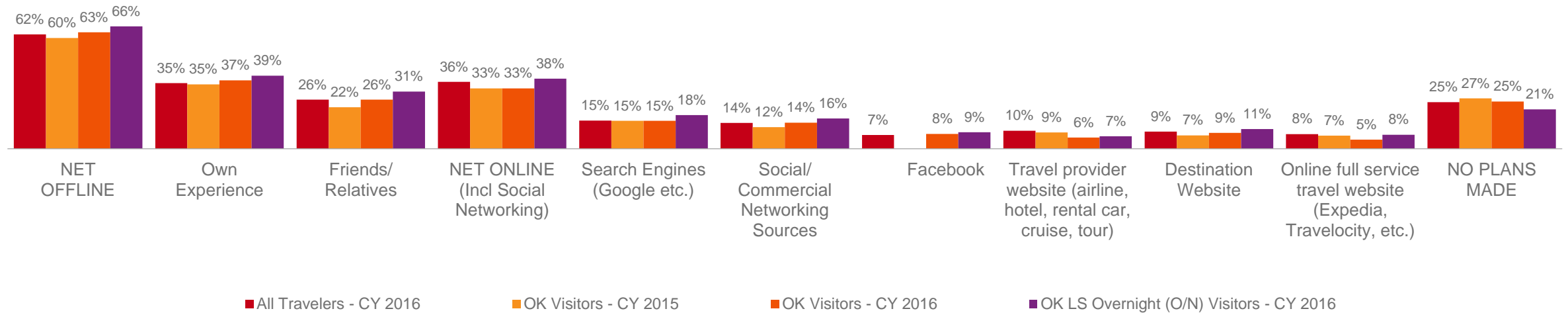
Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

*O/N = Overnight

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

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

Information Sources to Plan a Trip
Ranked by All Sources (8%+)



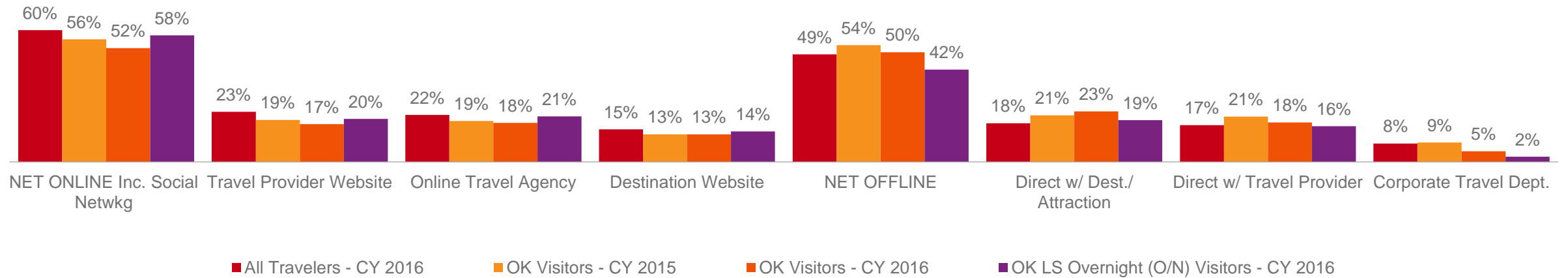
Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

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

LS = Leisure
O/N = Overnight

Oklahoma visitors book via the same channels as other travelers and similar to last year

Method Used to Book Trip Components
Ranked by All Sources (8%+)

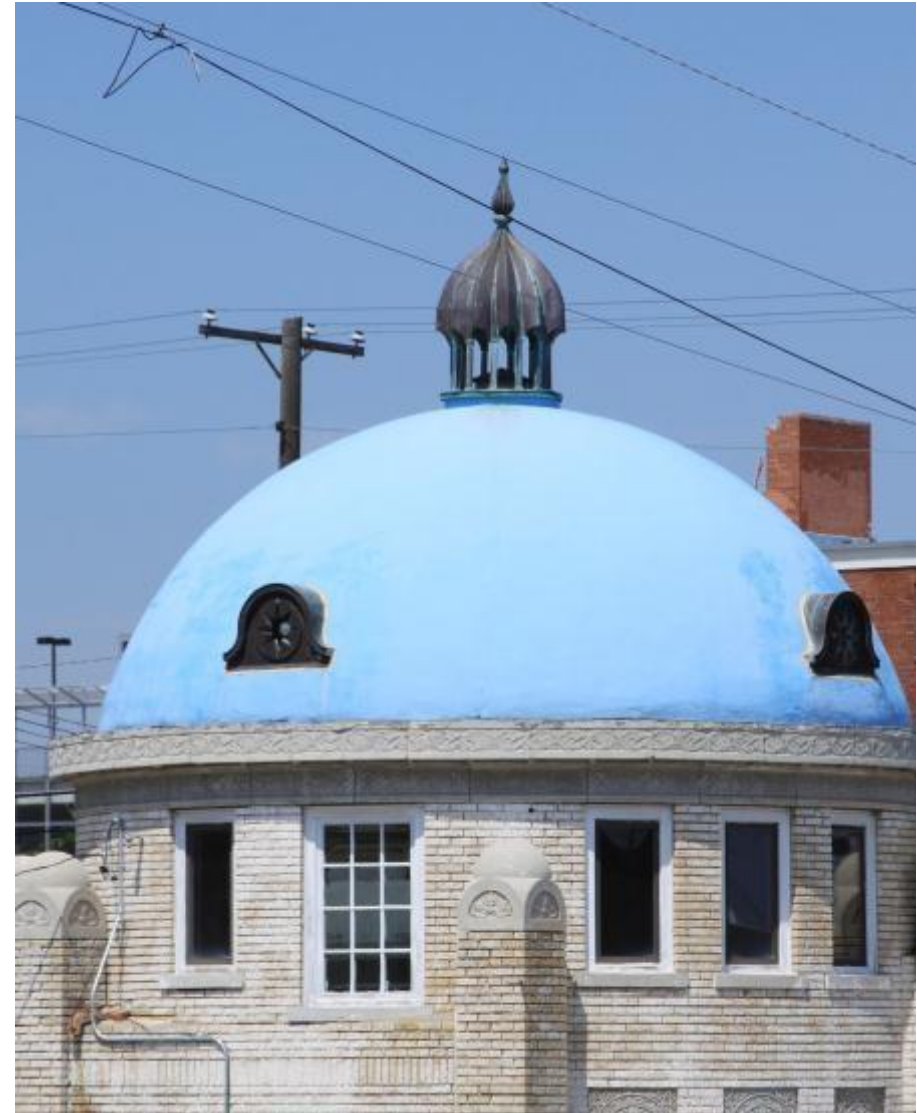


Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

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Trip Characteristics



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

- Very few fly (about a quarter as many as overall US travelers: 3% vs. 13%)
- Out-of-state visitors spend an extra day in Oklahoma (3.2 vs. 1.9 nights for in-staters).

Trip Choices (Trip Level)	All US Travelers CY 2016	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	80%	78%	100%	100%	70%	85%
Visit Friends/Relatives	43	40	53	43	39	40
Entertainment/Sightsee	13	14	18	14	9	18
Outdoor Recreation	8	6	7	13	9	5
Business	10	9	-	-	13	7
Personal Business/Other	10	13	-	-	18	8
PRIMARY MODE						
% Own Auto/Truck	76%	85%	87%	96%	87%	83%
% Rental Car	5	4	4	1	2	5
% Air Travel	13	3	5	-	0	6

Lodging (State Level)	All US Travelers CY 2016	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)	3.6	2.7	2.7	0.0	1.9	3.2
Private Home	1.2	1.1	1.3	0.0	0.6	1.5
Hotel/Motel	1.4	1.2	1.1	0.0	0.9	1.5
Other	1.0	0.4	0.3	0.0	0.4	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)

Of competitors, more TX visitors travel for business and fly; OK visitors take shorter trips

Trip Choices (Trip Level)	All US Travelers CY 2016	Visit OK	Visit KS	Visit TX	Visit AR	Visit MO
PRIMARY TRIP PURPOSE						
NET Leisure	80%	78%	77%	73%	74%	78%
Visit Friends/Relatives	43	40	47	42	39	42
Entertainment/Sightsee	13	14	8	12	11	15
Outdoor Recreation	8	6	5	8	10	7
Business	10	9	9	11	9	7
Personal Business/Other	10	13	15	16	17	15
PRIMARY MODE						
% Own Auto/Truck	76%	85%	83%	80%	85%	85%
% Rental Car	5	4	6	4	5	4
% Air Travel	13	3	6	10	5	6
Lodging (State Level)						
AVG # NIGHTS (if any)	3.6	2.7	2.9	3.2	3.4	2.8
Private Home	1.2	1.1	1.3	1.2	1.3	1.1
Hotel/Motel	1.4	1.2	1.2	1.3	1.1	1.1
Other	1.0	0.4	0.4	0.7	1.0	0.6

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

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

OK visitors often (39%) come with just one companion, but almost a third (30%) bring children

Trip Characteristics (Trip Level)	All US Travelers CY 2016	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	2.6	1.7	2.7	2.8	2.5	2.6
% Travel in Pairs	41%	39%	10%	42%	39%	34%	42%
% Travel w/ Children	29	30	13	33	36	31	29
Avg # Kids Inc. 0	0.6	0.6	0.3	0.7	0.7	0.6	0.6
Avg # Kids Exc. 0	1.9	2.0	2.4	2.0	2.0	2.0	2.0

Trip Characteristics (Trip Level)	All OK Visitors	Q1 Jan – Mar 2016	Q2 Apr – Jun 2016	Q3 Jul – Sep 2016	Q4 Oct – Dec 2016
AVERAGE # IN TRAVEL PARTY (Q3a)	2.6	2.4	2.7	2.6	2.6
% Travel in Pairs	39%	37%	47%	34%	36%
% Traveling with Children	30	28	28	32	32
Avg. # of Children on Trip Inc. Zero	0.6	0.5	0.6	0.7	0.7
Avg. # of Children on Trip Exc. Zero	2.0	1.7	2.0	2.3	2.1

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

Oklahoma and nearby competitors' travel parties look very similar, except Kansas visitors more often include children

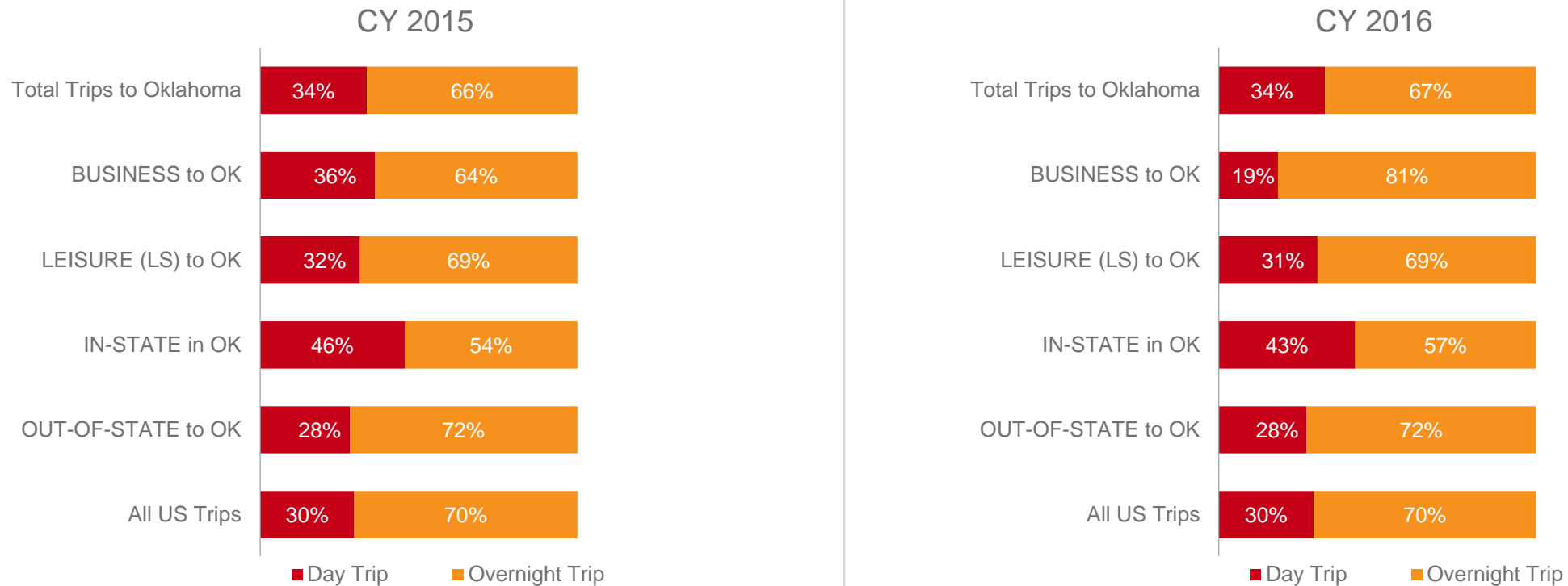
Trip Characteristics (Trip Level)	All US Travelers CY 2016	Visit OK	Visit KS	Visit TX	Visit AR	Visit MO
AVERAGE # IN TRAVEL PARTY	2.6	2.6	2.8	2.7	2.6	2.7
% Travel in Pairs	41%	39%	39%	39%	42%	38%
% Traveling with Children	29	30	38	33	31	31
Avg. # of Children on Trip Inc. 0	0.6	0.6	0.8	0.6	0.6	0.6
Avg. # of Children on Trip Exc. 0	1.9	2.0	2.2	1.9	1.9	2.1

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

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

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

% Day/Overnight Trips
Base: Trips to State; Total US

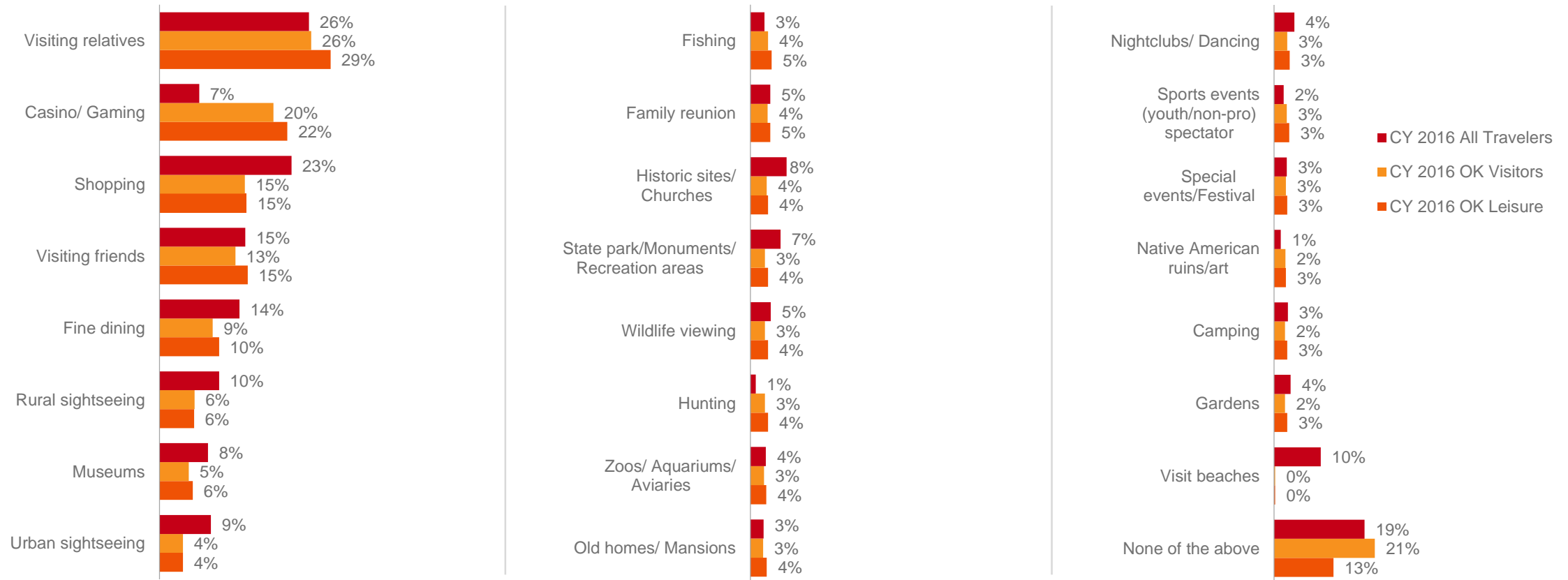


Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

Compared to average US travelers, slightly fewer OK visitors primarily see friends/relatives; in contrast, they far more often enjoy casinos/gaming

- In addition, fewer shop, enjoy fine dining, sightsee, visit museums/historical sites, or visit beaches.

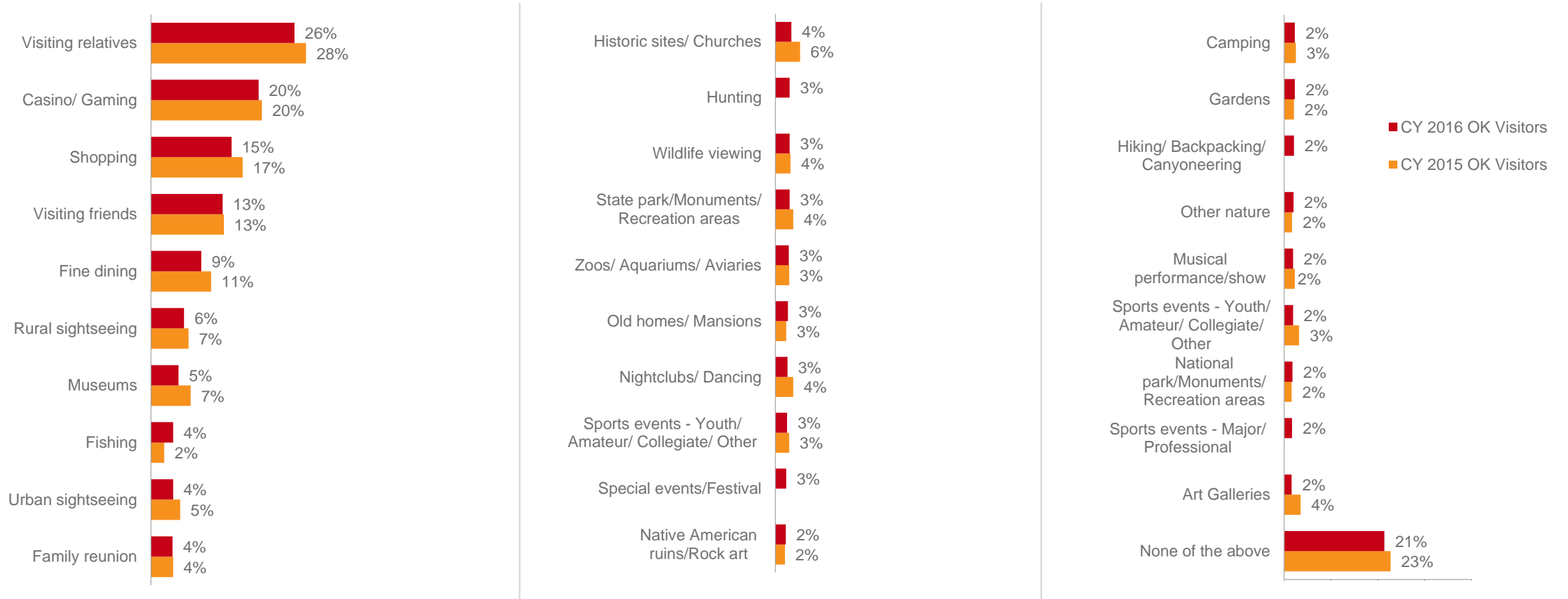
CY 2016 % Activities Participated/Attractions
 Ranked by 2016 Oklahoma Visitors (Activities with <3% for Oklahoma not shown)



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

Generally similar to last year, OK visitors hunt and fish a bit more; fewer visit relatives

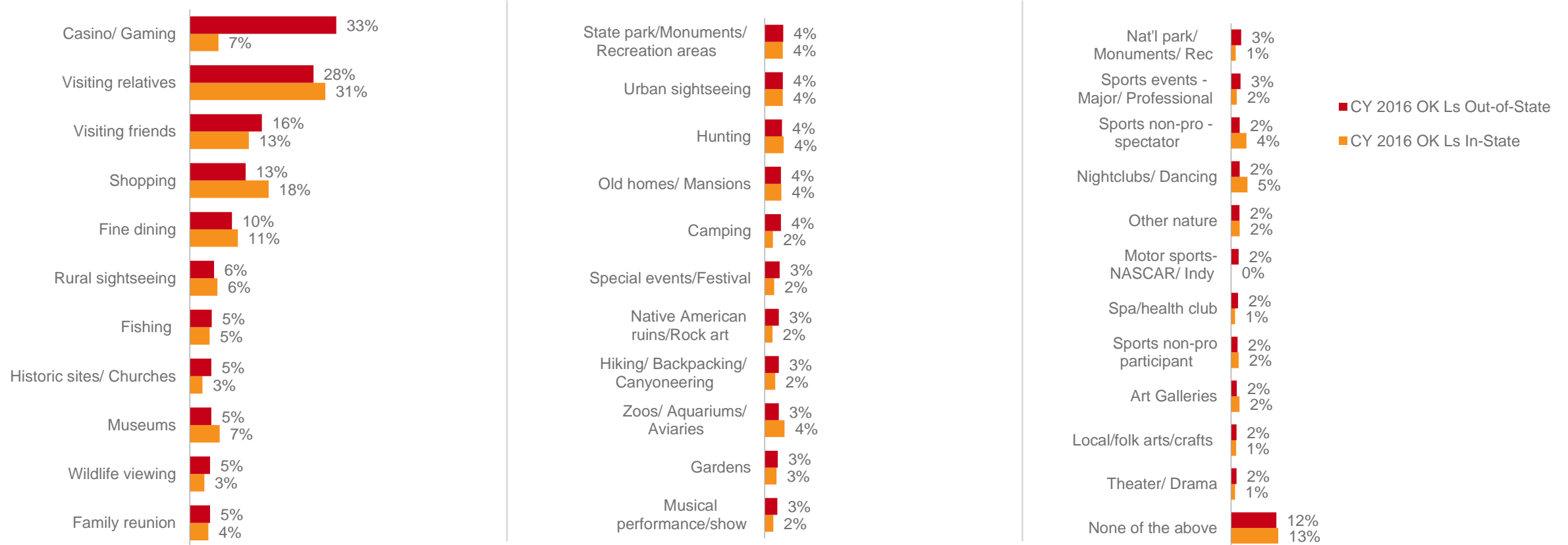
Trend: % Activities Participated/Attractions by Oklahoma Visitors
Ranked by 2016 Total Oklahoma Visitors



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 more likely opt for casino gaming and less likely shop

Activities Participated/Attractions Visited by Leisure Visitors % Participated/Visited – Ranked by 2016 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)

Half (51%) of leisure travelers visit friends/relatives and often stay with them; business travelers stay about the same length of time, but usually in hotels/motels

OKLAHOMA VISITORS Trip Choices (Trip Level)	Total OK 2014	Total OK 2015	Total OK 2016	Leisure 2016	Business 2016	Day Trip 2016	Overnight 2016
PRIMARY TRIP PURPOSE							
NET Leisure/Personal	72%	76%	78%	100%	-	73%	80%
Visit Friends/Relatives	41	42	40	51	-	31	42
Entertainment/Sightsee	13	14	14	17	-	11	15
Outdoor Recreation	5	6	6	8	-	10	5
Business	12	10	9	-	100	5	11
Personal Bs/Other	16	14	13	-	-	22	9
PRIMARY MODE							
% Own Auto/Truck*	86%	82%	85%	89%	46%	96%	81%
% Rental car	3	4	4	3	8	1	5
% Air Travel	5	7	3	3	5	0	4
AVG # IN TRAVEL PARTY	2.8	2.6	2.6	2.7	1.7	2.4	2.6
# IN TRAVEL PARTY - HOUSEHOLD	2.0	2.1	2.2	2.3	1.4	2.0	2.2
% Traveling Solo	29%	23%	25%	19%	73%	21%	27%
% Traveling With Children	26	27	30	33	13	23	32
OKLAHOMA VISITORS Lodging (State Level)	Total OK 2014	Total OK 2015	Total OK 2016	Leisure 2016	Business 2016	Day Trip 2016	Overnight 2016
AVG # NIGHTS (if any)	3.2	2.6	2.7	2.7	2.8	0.0	2.7
Private Home	1.6	1.0	1.1	1.3	0.0	0.0	1.1
Hotel/Motel	1.1	1.1	1.2	1.1	2.3	0.0	1.2
Other	0.5	0.5	0.4	0.3	0.5	0.0	0.4

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

Out-of-state visitors more likely come for leisure and stay longer

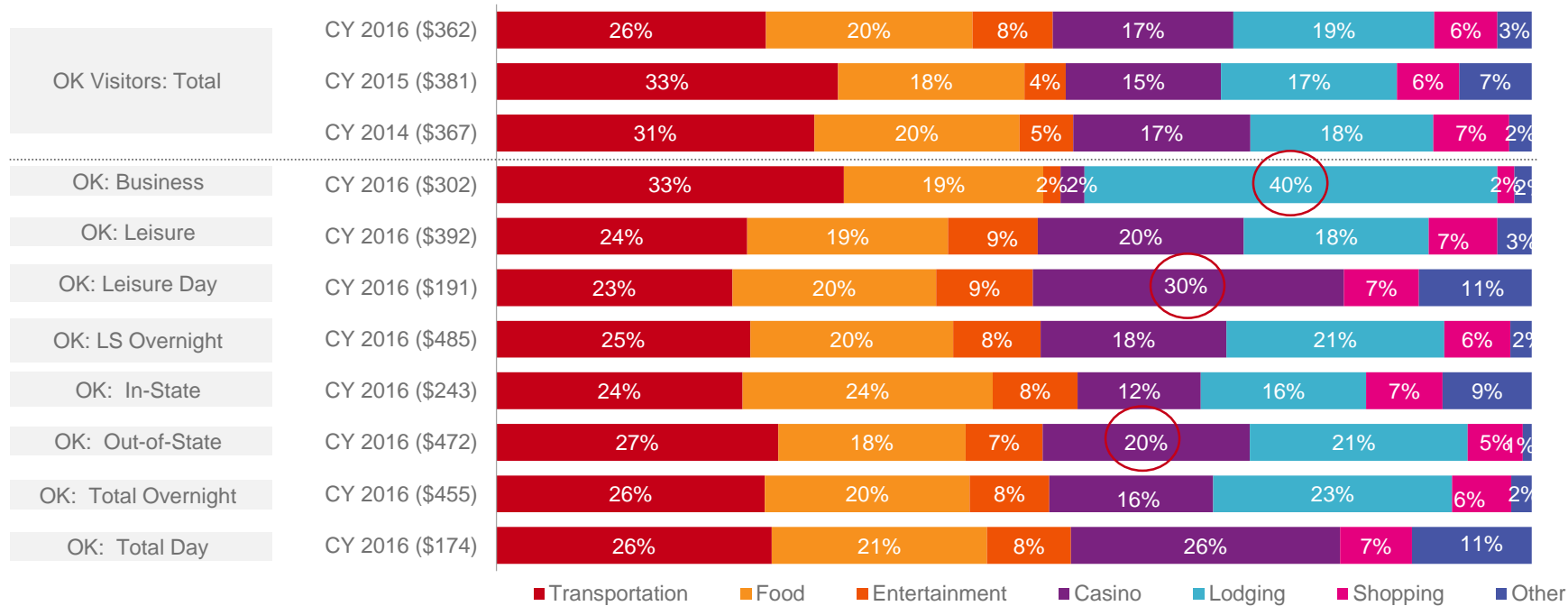
OKLAHOMA VISITORS Trip Choices (Trip Level)	Total OK 2014	Total OK 2015	Total OK 2016	In-State Visitors 2016	Out-of-State Visitors 2016
PRIMARY TRIP PURPOSE					
NET Leisure/Personal	72%	76%	78%	70%	85%
Visit Friends/Relatives	41	42	40	39	40
Entertainment/Sightsee	13	14	14	9	18
Outdoor Recreation	5	6	6	9	5
Business	12	10	9	13	7
Personal Bs/Other	16	14	13	18	8
PRIMARY MODE					
% Own Auto/Truck*	86%	82%	85%	87%	83%
% Rental Car	3	4	4	2	5
% Air Travel	5	7	3	0	6
AVG # IN TRAVEL PARTY	2.8	2.6	2.6	2.5	2.6
# IN TRAVEL PARTY - HOUSEHOLD	2.0	2.1	2.2	2.2	2.2
% Traveling Solo	29%	23%	25%	31%	20%
% Traveling With Children	26	27	30	31	29
OKLAHOMA VISITORS Lodging (State Level)					
AVG # NIGHTS (if any)	3.2	2.6	2.7	1.9	3.2
Private Home	1.6	1.0	1.1	0.6	1.5
Hotel/Motel	1.1	1.1	1.2	0.9	1.5
Other	0.5	0.5	0.4	0.4	0.2

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

Out-of-staters and overnighters spend the most

- Out-of-staters and day-trippers spend a larger share of budget on casinos
- Business travelers buy accommodations.

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

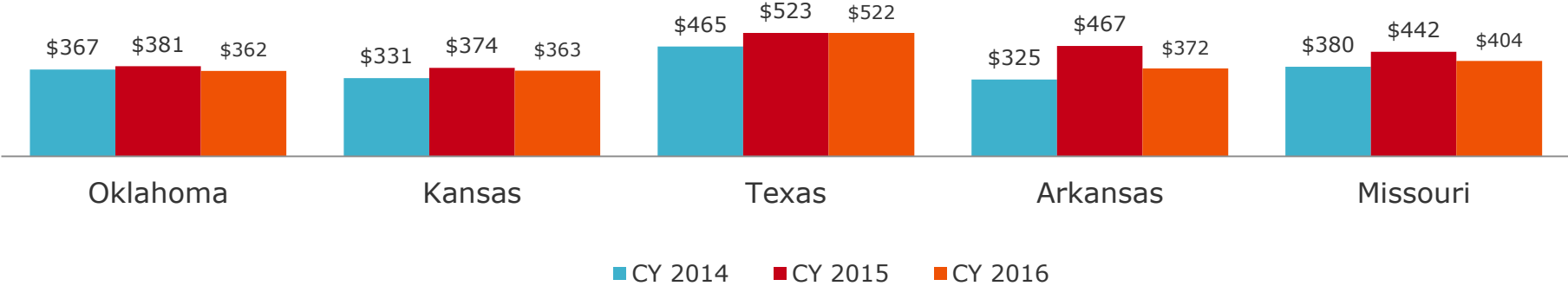


Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

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

Oklahoma visitors spend similar amounts as visitors to competitors, except less than those traveling to Texas or Missouri

Average Spending in State, CY 2016 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)

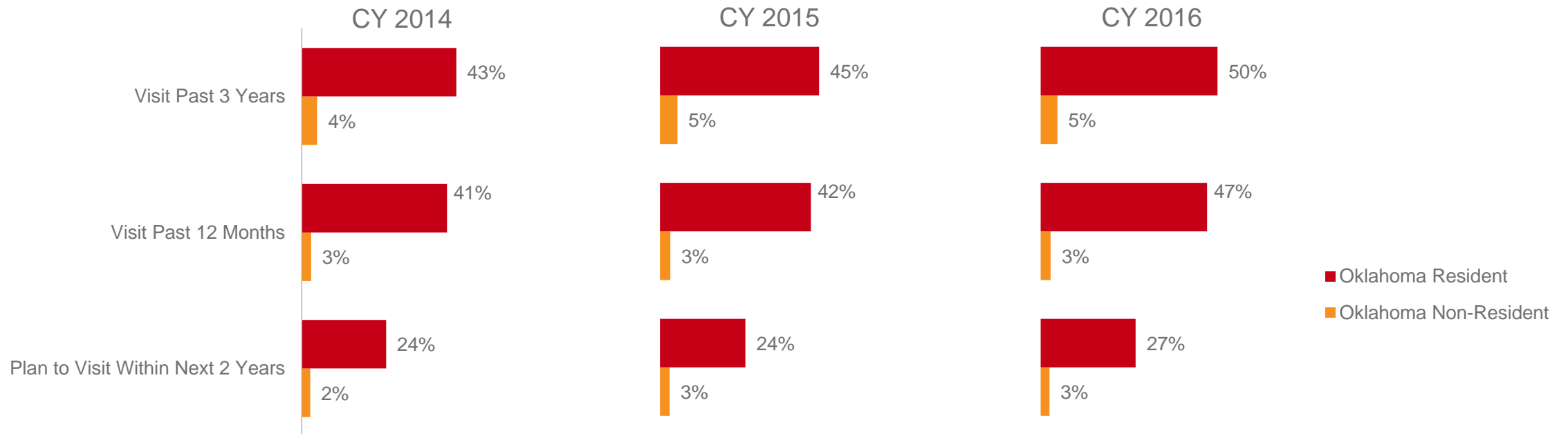
8 Competitive Environment



Oklahoma draws a large share of visitors from residents

- 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 2016)

All Oklahoma Visitors	CY 2014	CY 2015	CY 2016	Oklahoma Residents	CY 2014	CY 2015	CY 2016	Non-Oklahoma Residents	CY 2014	CY 2015	CY 2016
Oklahoma City area	31%	32%	32%	Oklahoma City area	29%	32%	35%	Oklahoma City area	32%	32%	30%
Tulsa area	24	22	25	Tulsa area	23	23	22	Tulsa area	24	21	29
Norman	6	7	7	Norman	4	6	7	Norman	8	8	7
Muskogee	3	4	4	Lawton	4	6	3	Muskogee	3	4	2
Lawton	5	5	3	Ardmore	3	3	2	Ardmore	5	4	5
Ardmore	3	4	3	Stillwater	5	7	2	Lawton	5	4	3
Stillwater	4	5	2	Muskogee	3	4	6	Stillwater	2	3	2
Bartlesville	2	3	1	Bartlesville	1	2	1	Bartlesville	3	4	2

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)

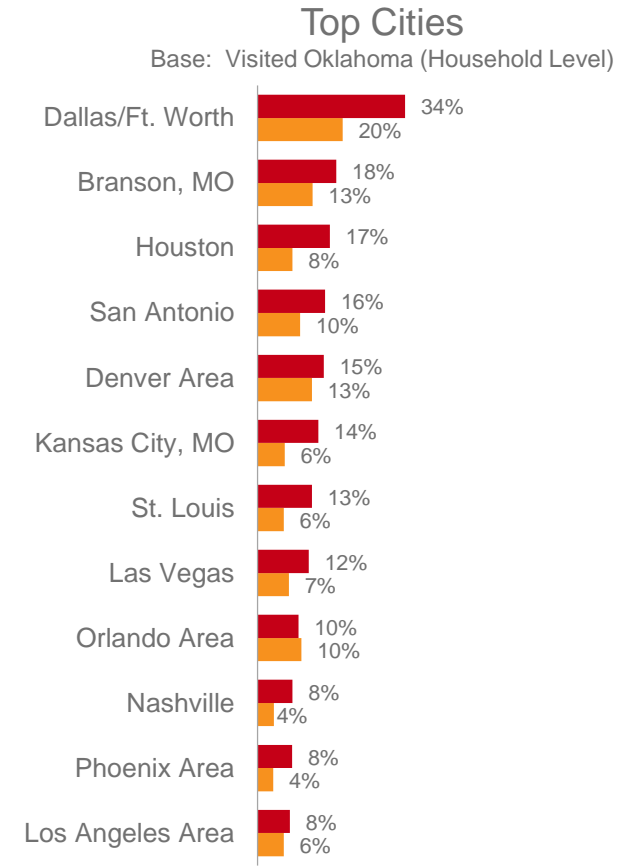
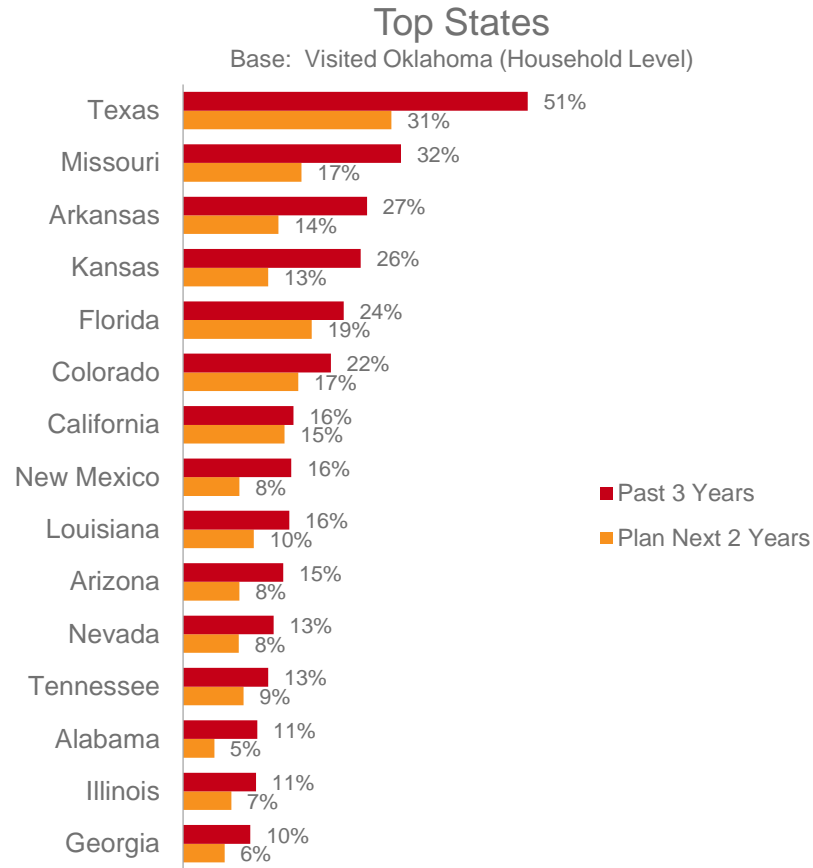
OK Visitors	CY 2016	KS Visitors	CY 2016	TX Visitors (3%+)	CY 2016	AR Visitors	CY 2016	MO Visitors	CY 2016
Oklahoma City area	32%	Kansas City Area	41%	Dallas area	20%	Little Rock	27%	St. Louis	23%
Tulsa area	25	Wichita	19	Houston area	17	Hot Springs	16	Kansas City Area	17
Norman	7	Topeka	10	Austin area	13	Fayetteville	14	Branson	15
Muskogee	4	Lawrence	8	San Antonio area	12	Fort Smith	12	Springfield	11
Ardmore	3	Manhattan	7	Fort Worth area	7	Eureka Springs	9	Lake of the Ozarks	6
Lawton	3	Hutchinson	6	Amarillo	5	Texarkana	8	Joplin/Carthage	5
Stillwater	2	Salina	5	Waco	5	Pine Bluff	3	Columbia	5
Bartlesville	1	Dodge City	3	Galveston	4			Jefferson City	4
		Emporia	3	Corpus Christi	4			St. Joseph	3
		Abilene	2	Abilene	3			St. Charles	3
				El Paso	3			Cape Girardeau	4
				Beaumont/Port Arthur	3			Hannibal	2
								Independence	2

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

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



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

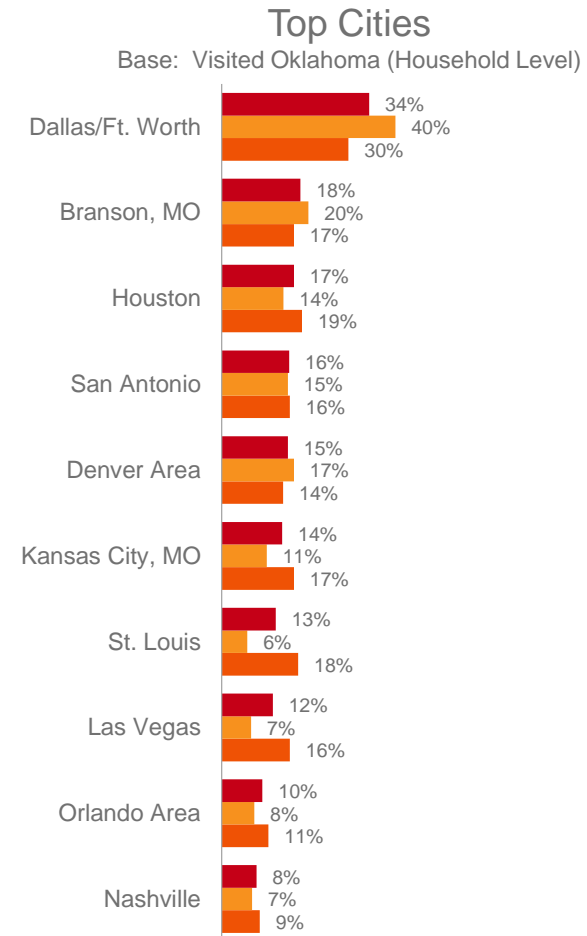
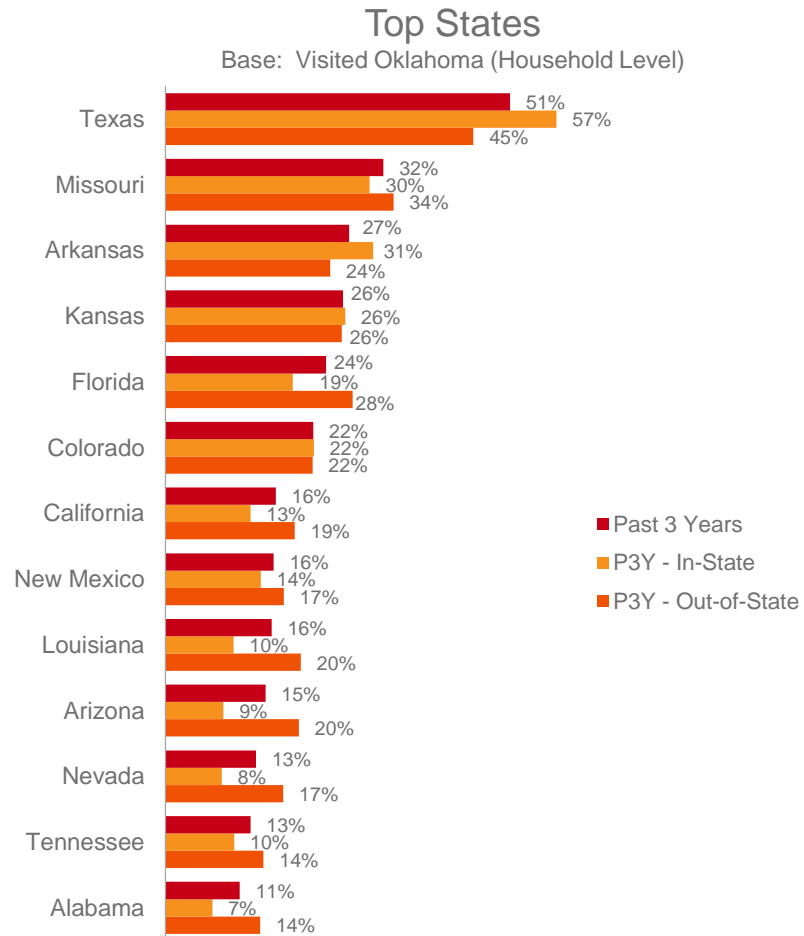
Q7c: US states plan to visit next two years. (Household Level)

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.

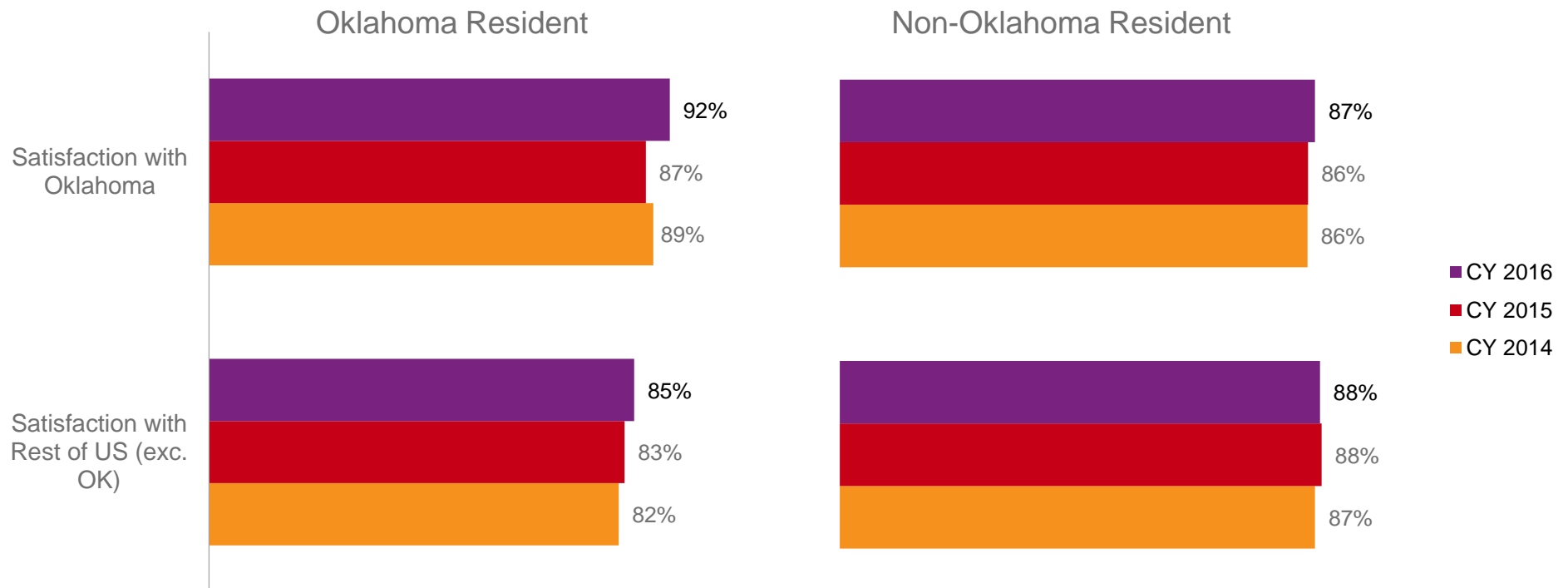
Q8a: US cities visited past three years.

9 Satisfaction



OK visitors usually go home satisfied, especially residents

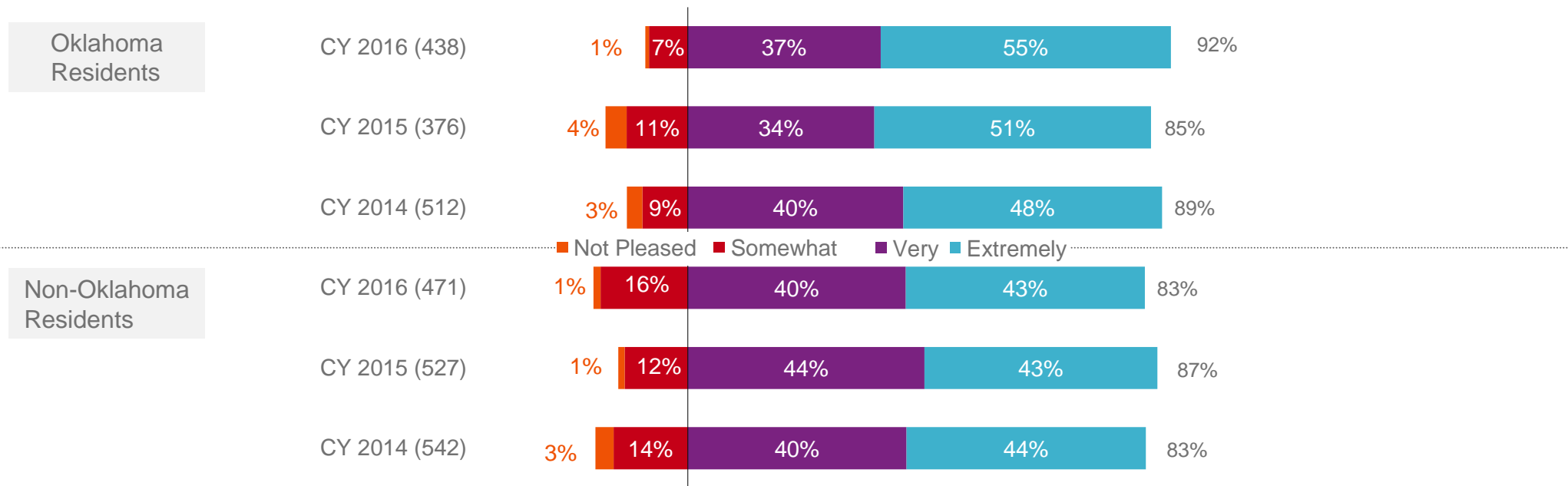
Extremely/Very Satisfied With Trip to State or Rest of US



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

Overall satisfaction with Oklahoma remains similar to the prior year, with a gain in resident satisfaction offsetting a small slip among non-residents

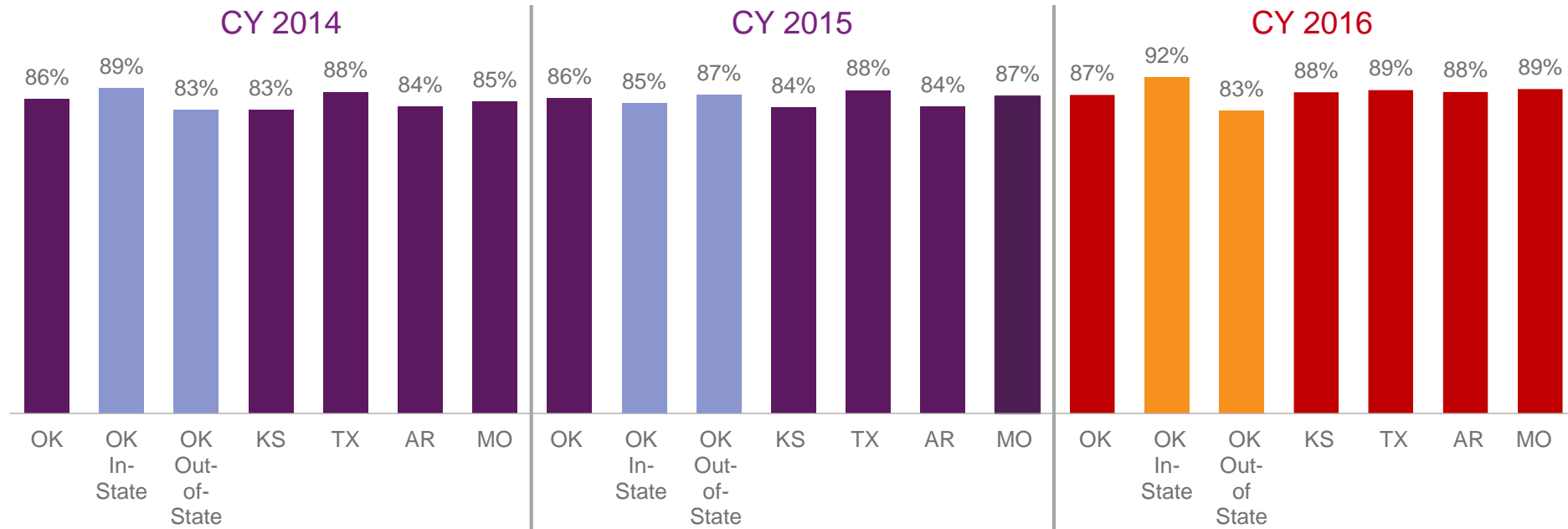
Satisfaction with Oklahoma Visit
By Group (Base)



*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 as well as competitors, more so among those most familiar with the state (in-state visitors)

Satisfaction: Extremely/Very Satisfied with Visit to State



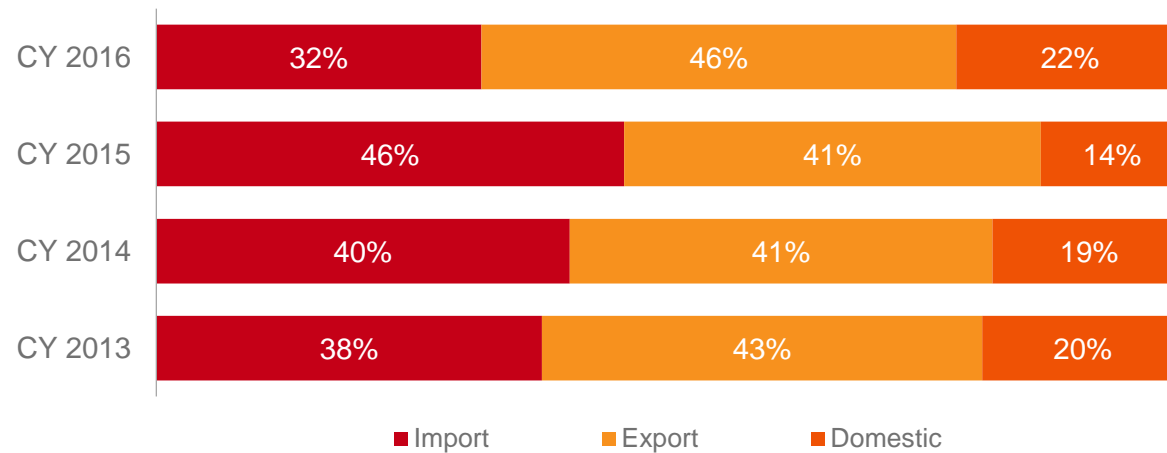
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with ... (State Level-demo wtd.)

10 Export/Import



Oklahoma's exports climb above imports

- Spending levels by visitors remain near the past
- A larger share of visitors reside in-state than last year, increasing “domestic” spending
- Fewer Oklahoma residents travel outside the state, which reduces “import” expenditures.



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, compared to out-of-state visitors, in-state visitors tend to be younger, fewer married, more likely living with others (3+), and less affluent.

Demographics	All US Travelers 2015	All US Travelers 2016	Oklahoma Visitors Total 2015	Oklahoma Visitors Total 2016	Oklahoma In-State Visitors CY 2015	Oklahoma In-State Visitors CY 2016	Oklahoma Out-of-State Visitors CY 2015	Oklahoma Out-of-State Visitors CY 2016
Average Age	47	46	48	47	46	45	49	48
Average Household Income	\$74,900	\$80,600	\$72,000	\$73,500	\$61,000	\$60,400	\$78,300	\$83,700
% Male	32	31	31	28	26	26	35	29
% Married	59	60	63	64	56	60	66	66
Household Composition								
% One Person	17	16	18	15	20	17	17	13
% Two People	39	38	40	39	31	34	45	43
% Three or More	44	46	42	47	49	49	38	45
Ethnicity								
% Caucasian	84	84	88	89	85	87	89	90
% African-American	7	7	4	3	4	2	4	4

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

Oklahoma overnight visitors report greater affluence and a slightly higher marriage rate than day-trippers

- Oklahoma business travelers tend to be younger, more affluent, more likely married, and more of them live in 2-person households than leisure visitors.

Demographics	Oklahoma Visitors Total 2016	Oklahoma Leisure Visitors	Oklahoma Business Visitors	Oklahoma Day-Trippers	Oklahoma Overnight (O/N) Visitors
Average Age	47	47	44	47	47
Average Household Income	\$73,500	\$73,100	\$113,200	\$57,800	\$81,000
% Male	28	29	14	28	28
% Married	64	63	74	60	65
Household Composition					
% One Person	15	15	11	15	14
% Two People	39	37	53	35	41
% Three or More	47	48	36	50	45
Ethnicity					
% Caucasian	89	90	100	90	88
% African-American	3	4	-	2	4

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

Visitors to Oklahoma and key competitors share similar demographic profiles

- Texas relies most heavily on in-state travelers and has greater ethnic variety.

Demographics	Oklahoma Visitors CY 2016	Kansas Visitors CY 2016	Texas Visitors CY 2016	Arkansas Visitors CY 2016	Missouri Visitors CY 2016
Average Age	47	46	45	47	47
Average Household Income	\$73,500	\$79,500	\$81,400	\$76,300	\$76,000
% Male	28	35	28	32	31
% Married	64	76	63	65	64
% In-State Visitor	44	42	72	44	44
Household Composition					
% One Person	15	8	14	13	14
% Two People	39	45	39	42	42
% Three or More	47	47	48	45	15
Ethnicity					
% Caucasian	89	95	85	90	93
% African-American	3	2	6	6	2
% Spanish Origin	6	5	12	5	4
Total Households (Census)	1,455,321	1,113,472	9,149,196	1,138,025	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 2016.

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

- TNS uses its Lightspeed US panel to manage sample for TravelsAmerica
- 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, 2016

CY 2015 Travelers (Unweighted Respondents)	CY 2016 Travelers (Unweighted Respondents)	CY 2015 Travelers (Weighted by Demographics)	CY 2016 Travelers (Weighted by Demographics)	Region
1,332	1,504	1,290	1,235	Oklahoma Residents
971	1,027	929	972	Oklahoma Visitors (Trips)
61,552	57,930	59,673	58,792	Total for TravelsAmerica

Thank you



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