

Calendar Year 2015 – Oklahoma TravelsAmerica Visitor Profile Report Presentation



Calendar Year 2015 – Oklahoma
TravelsAmerica Visitor Profile Report

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OKLAHOMA


Our time together

- TNS
- Your Profile
- What does it all mean?

World's largest custom marketing research firm

One of the largest travel research practices in the U.S

Company owned offices in over 100 countries

Over 14,000 employees



About WPP



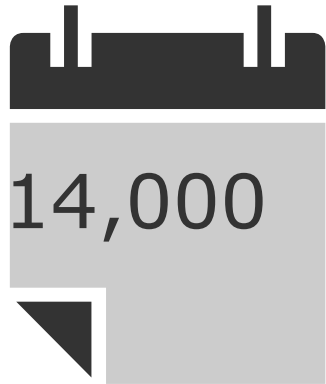
WPP



Your Profile



TravelsAmerica: We speak to travelers – lots of them



households
a month...



...that's
168,000

American
households
each year...



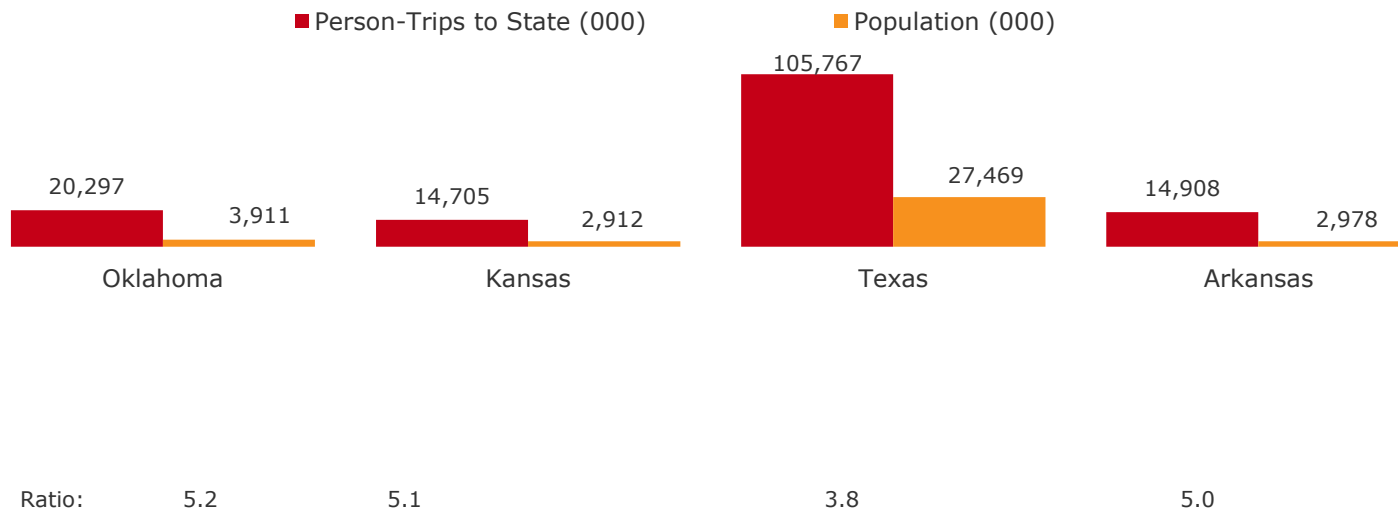
...and over
1 million in the last
6 years

We are the official research vendor of record to the

U.S. TRAVEL
ASSOCIATION

Tourism = Important to Oklahoma

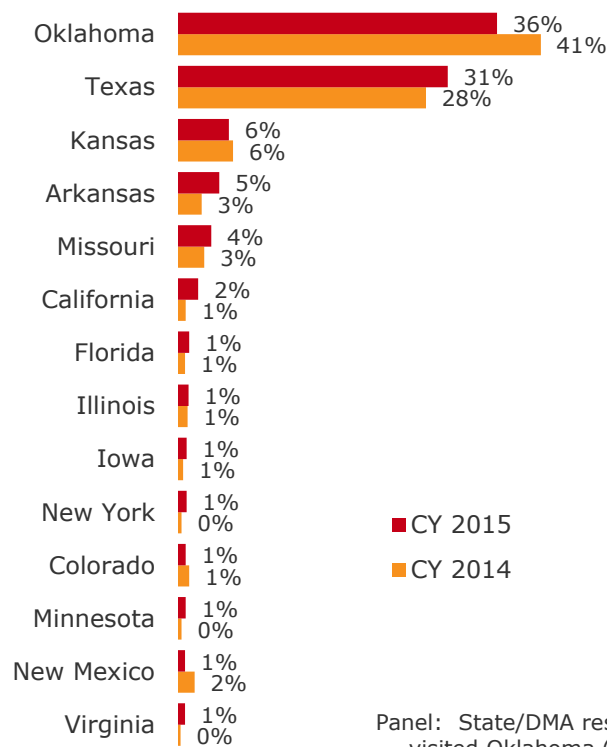
Visitors vs. Population



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

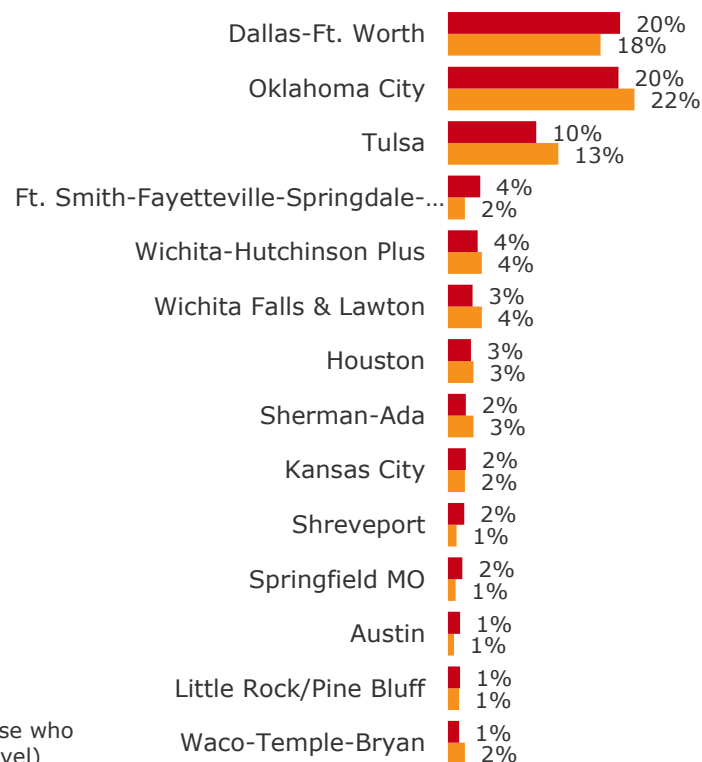
- Plus, a third (5 of 14) of the top source DMAs are in Texas.

Source of Visitors: Top States
Base: Visited Oklahoma
% of Visitors Residing in . . . (CY 2015)



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

Source of Visitors: Top DMAs
Base: Visited Oklahoma
% of Visitors Residing in . . . (CY 2015)

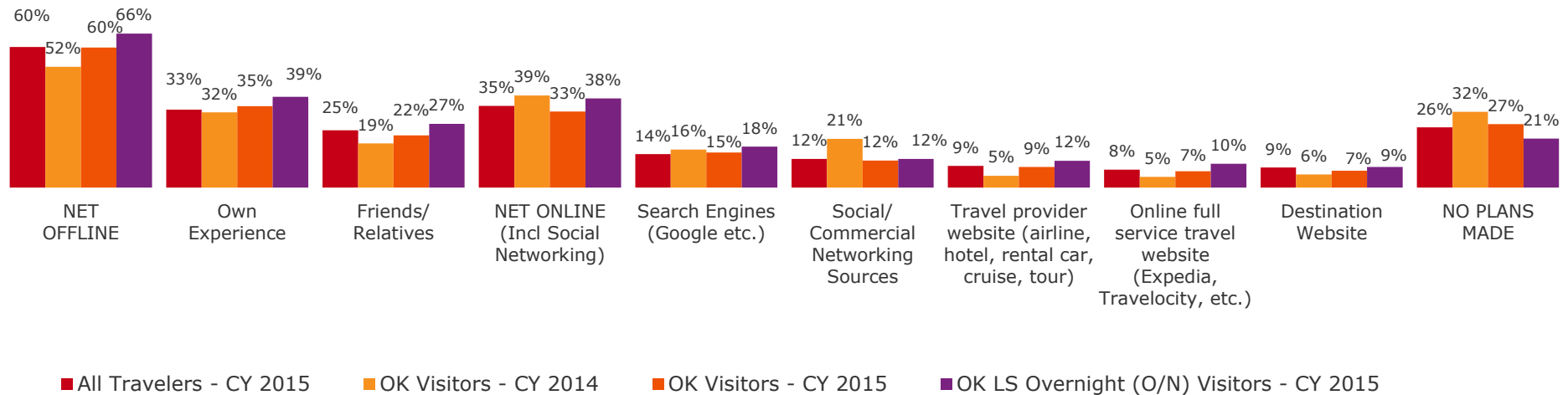


Visitors most commonly use on their own experience to plan an Oklahoma trip

- 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



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

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

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2015	OK Visitors Total CY 2013	OK Visitors Total CY 2014	OK Visitors Total CY 2015	OK Visitors Leisure O/N* CY 2015	OK Visitors Leisure Day Trip CY 2015	OK In-State Visitors CY 2015	OK Out-of-State Visitors CY 2015
Considered								
Within Two Weeks	30%	37%	37%	36%	28%	52%	51%	29%
2 - 4 Weeks	17	16	17	16	16	14	15	16
1 - 3 Months	19	16	17	17	19	13	15	18
3+ Months	34	31	30	31	37	22	19	37
Decided								
Within Two Weeks	39%	45%	46%	45%	37%	61%	61%	38%
2 - 4 Weeks	18	16	17	17	17	13	14	18
1 - 3 Months	18	16	15	16	20	13	12	18
3+ Months	25	23	23	22	26	13	13	26

*O/N = Overnight

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



Oklahoma and nearby competitors' travel parties look very similar

Trip Characteristics (Trip Level)	All US Travelers CY 2015	Visit OK	Visit KS	Visit TX	Visit AR
AVERAGE # IN TRAVEL PARTY	2.7	2.6	2.7	2.7	2.9
% Travel in Pairs	40%	43%	41%	38%	39%
% Traveling with Children	28	27	30	30	34
Avg. # of Children on Trip Inc. 0	0.6	0.5	0.6	0.6	0.7
Avg. # of Children on Trip Exc. 0	2.0	1.8	1.9	2.1	2.2

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip 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 2015	Visit OK	Visit KS	Visit TX	Visit AR
PRIMARY TRIP PURPOSE					
NET Leisure	79%	76%	78%	74%	74%
Visit Friends/Relatives	43	42	51	46	41
Entertainment/Sightsee	13	14	9	9	9
Outdoor Recreation	8	6	5	6	9
Business	12	10	11	14	12
Personal Business/Other	10	14	11	12	15
PRIMARY MODE					
% Own Auto/Truck	74%	82%	82%	75%	78%
% Air Travel	13	7	7	13	5
Lodging (State Level)	All US Trips CY 2015	Visit OK	Visit KS	Visit TX	Visit AR
AVG # NIGHTS (if any)	2.6	2.6	3.0	3.3	3.3
Private Home	1.0	1.0	1.6	1.5	1.2
Hotel/Motel	1.1	1.1	1.3	1.3	1.2
Other	0.5	0.5	0.1	0.5	0.9

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)

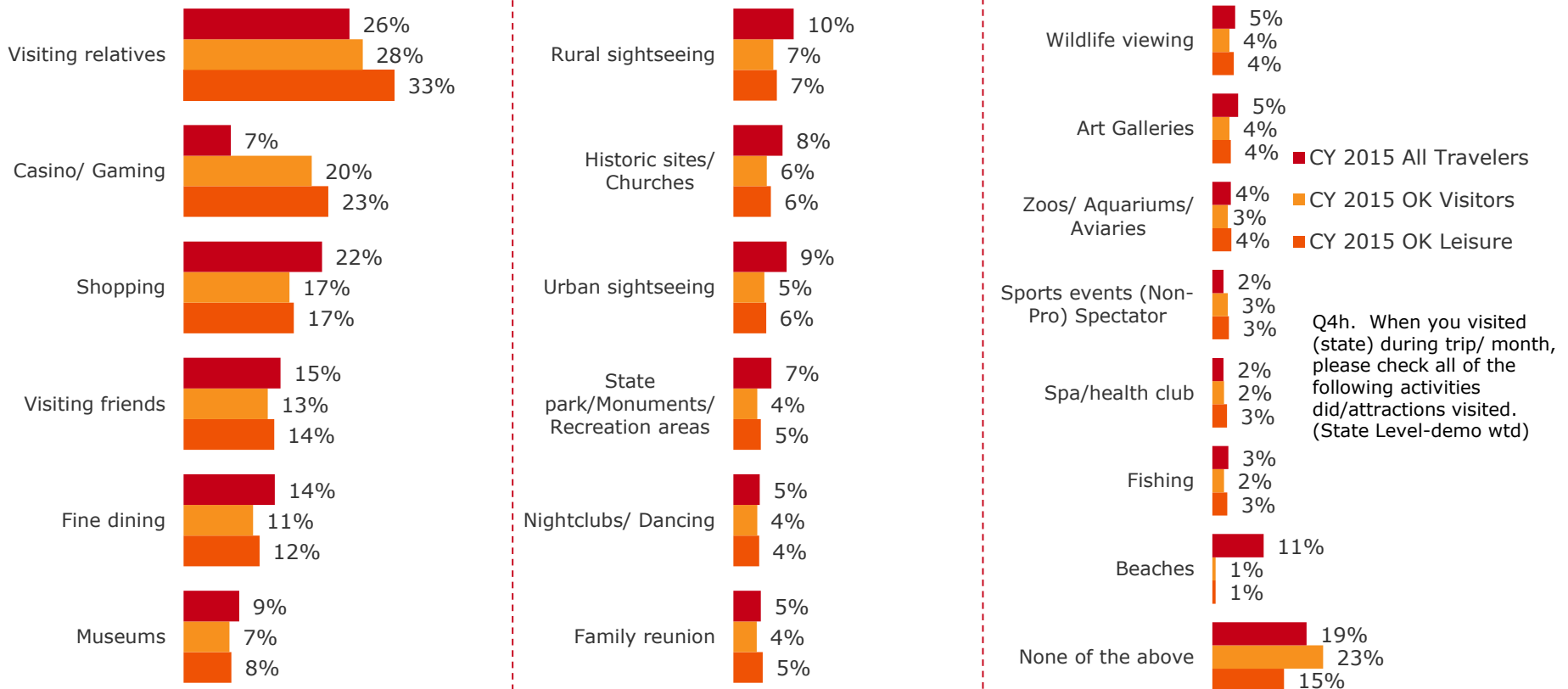


Oklahoma travelers primarily visit friends/relatives

- Compared to other US travelers, a much larger share of travelers come for casinos and gaming while fewer shop, enjoy fine dining, or visit beaches.

CY 2015 % Activities Participated/Attractions

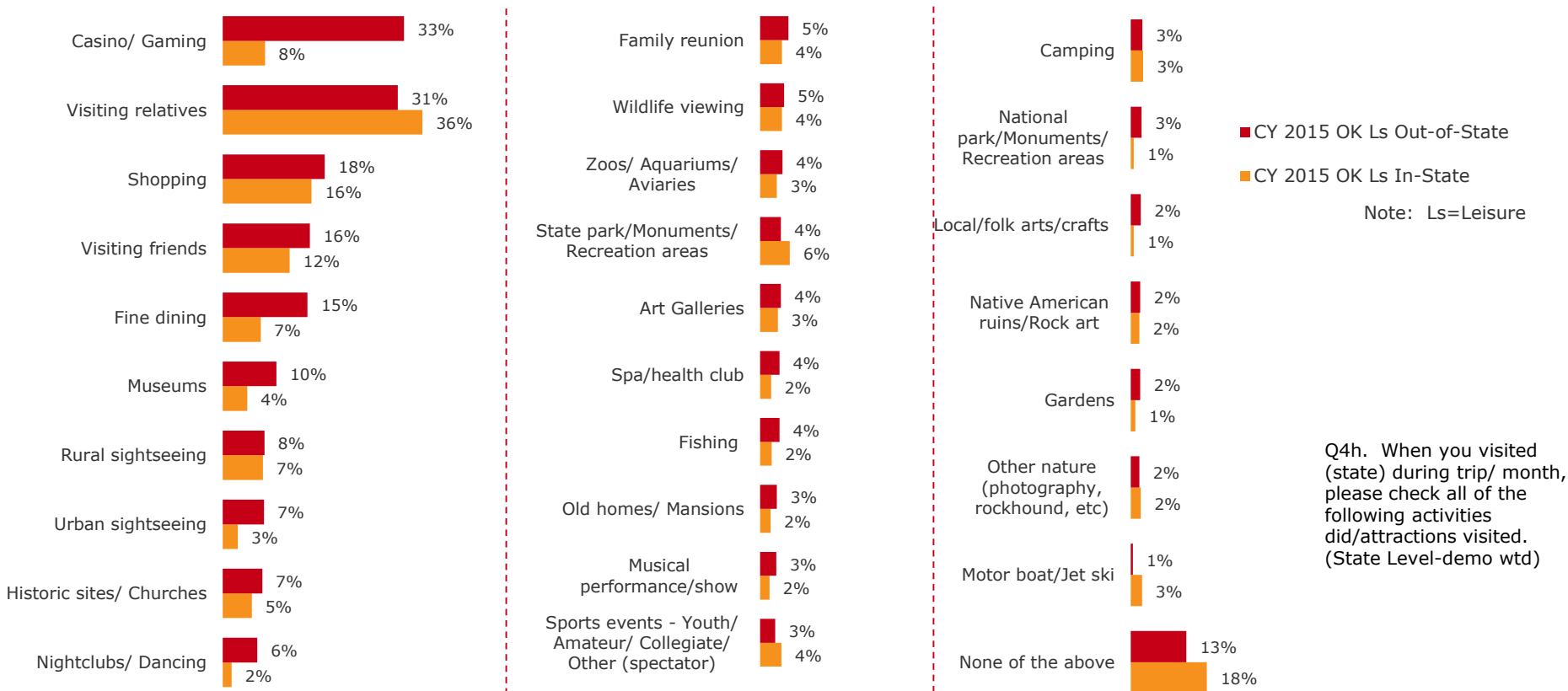
Ranked by 2015 Oklahoma Visitors (Activities with <3% for Oklahoma not shown)



Out-of-staters more likely opt for “touristy” choices

- Especially gaming, dining, museums, urban sightseeing, clubs/dancing; they also add history and outdoor pursuits (fishing, National parks).
- In-staters more often visit relatives, go to state parks, and watch their local sports teams.

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



Want to be a
traveler, not a
tourist

79%

Try to go to
places
**off the beaten
path**

64%

what

Travel and vacations are all about ...

Adventure

trying new
things

87%

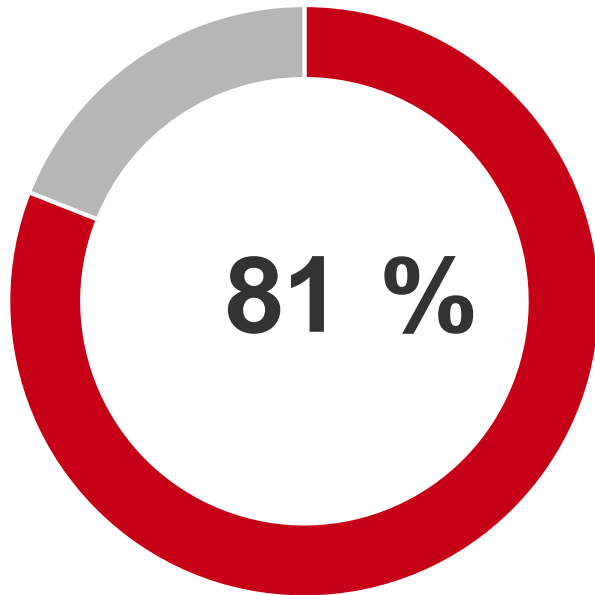
Relaxing

unwinding

91%

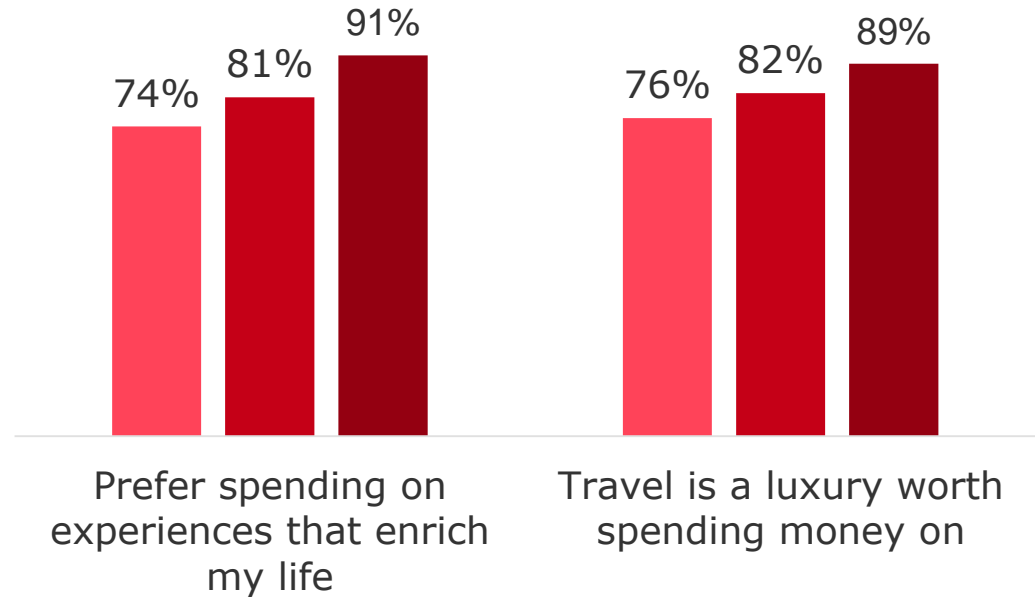


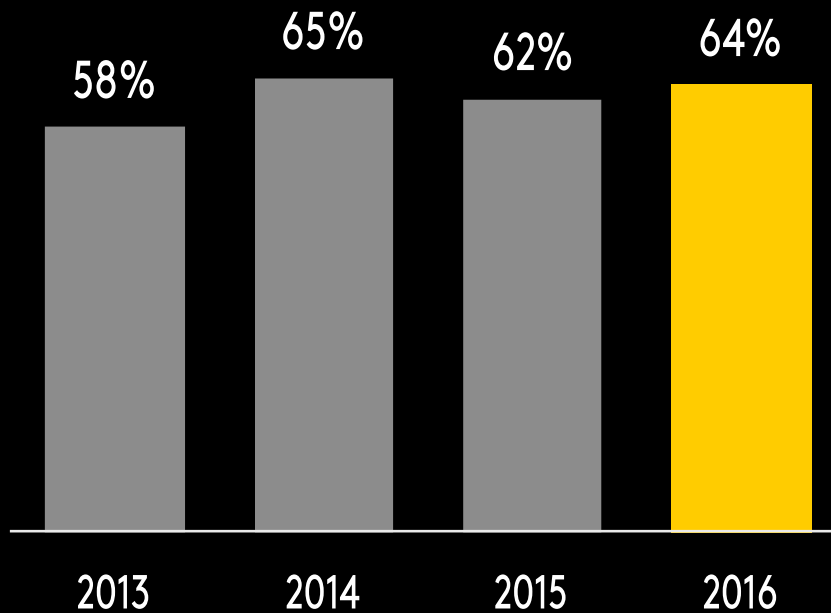
Prefer spending on experiences that enrich my life, like travel and vacations



Travel Perceptions by Income

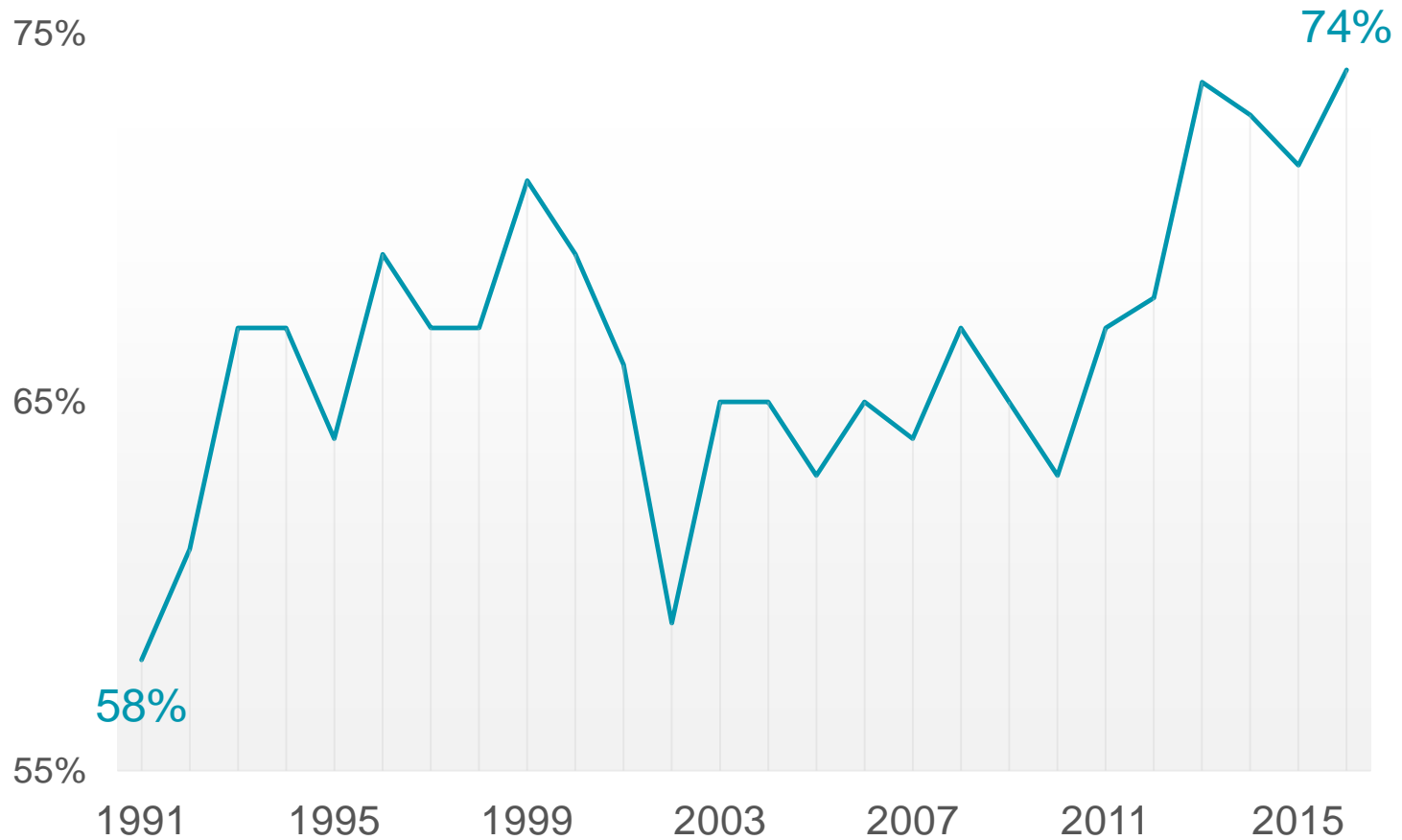
■ Under \$50K ■ \$50-99K ■ \$100K+





More likely to choose
brands that expose
me to new sensations
and experiences

“I would welcome more novelty and change in my life”



Competitive Environment



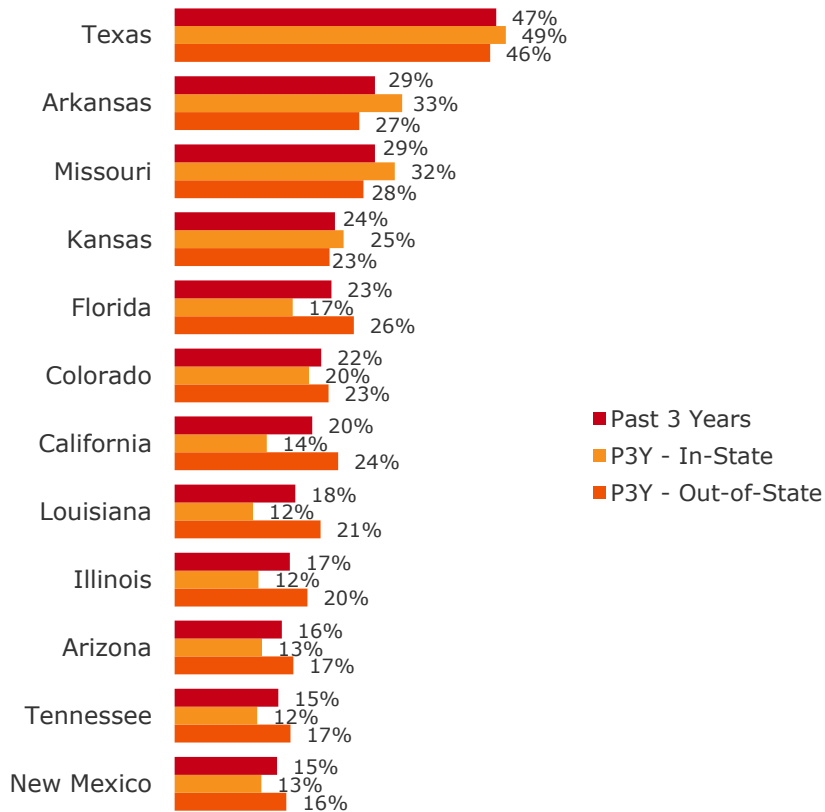
Out-of-staters visit a broader variety of destinations

- Out-of-state visitors more likely visit areas beyond Oklahoma's border states than in-state travelers.

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

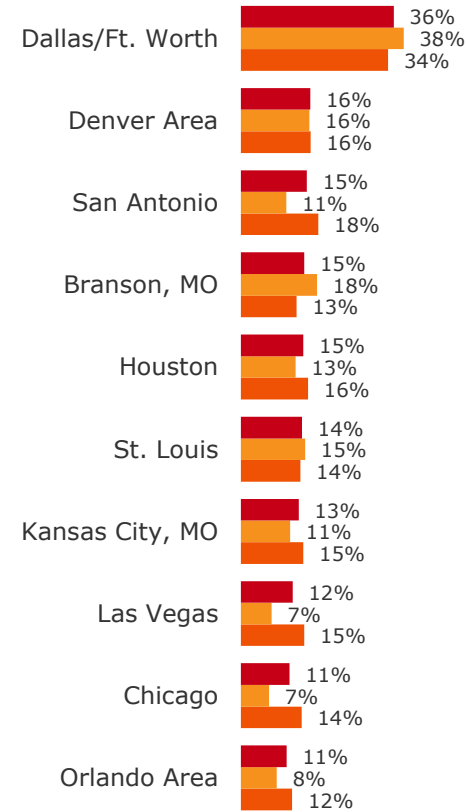
Top States

Base: Visited Oklahoma (Household Level)



Top Cities

Base: Visited Oklahoma (Household Level)



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

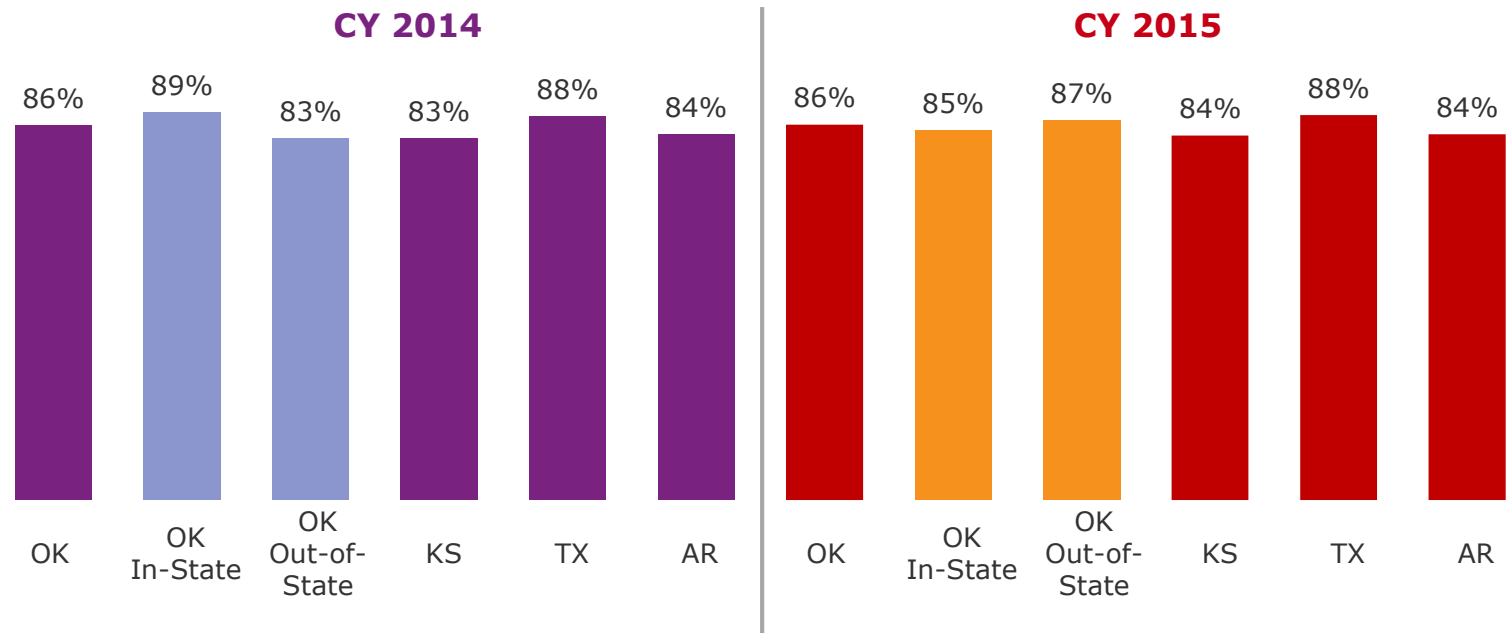
Q8a: US cities visited past three years.



Oklahoma satisfies visitors better than Kansas or Arkansas

- However, Texas visitors are the most satisfied among visitors to these four states
- Only a marginal difference in praise exists between in-staters and out-of-staters.

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.)

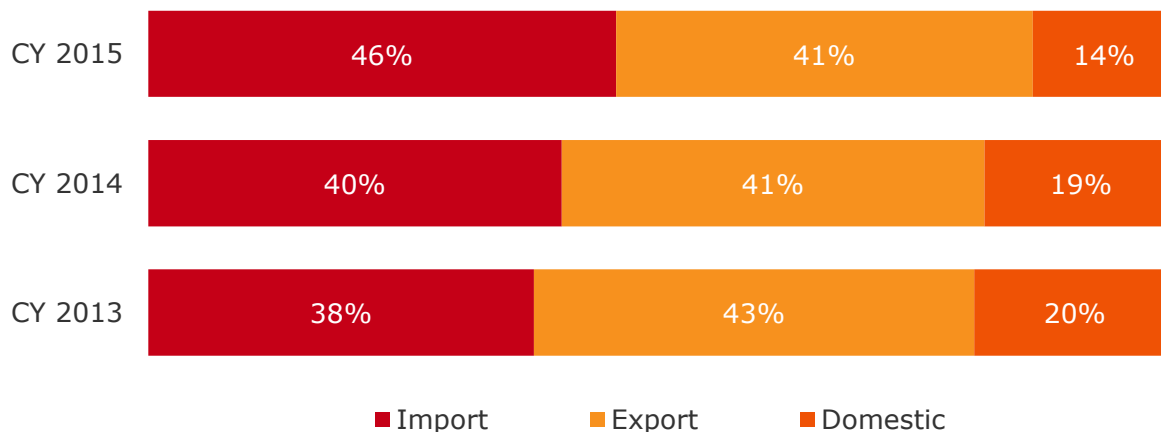
Export/Import



Oklahoma's imports move above exports

"Balance of Trade":

- Oklahoma residents who visit other states spend more (\$581) than non-Oklahomans do when they visit Oklahoma (\$486), contributing to the rise in imports vs. exports
- However, adding Oklahoma residents' spending inside the state ("domestic" spending) still keeps total tourism dollars spent in Oklahoma above the total spent by Oklahoma residents elsewhere.



Import represents \$ leaving OK

Export represents \$ coming into OK

Domestic represents \$ staying in OK

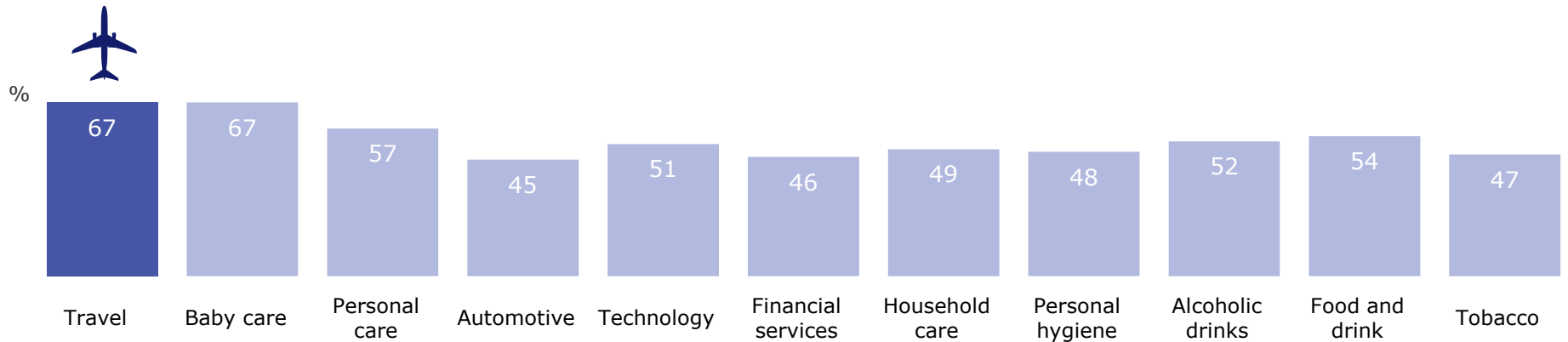
Note: Spending that occurs outside the state by non-residents is not included in the chart.

Connected Life



Travel and baby care lead in engaging consumers

Willingness of category users to engage with brands



Source: TNS Connected Life



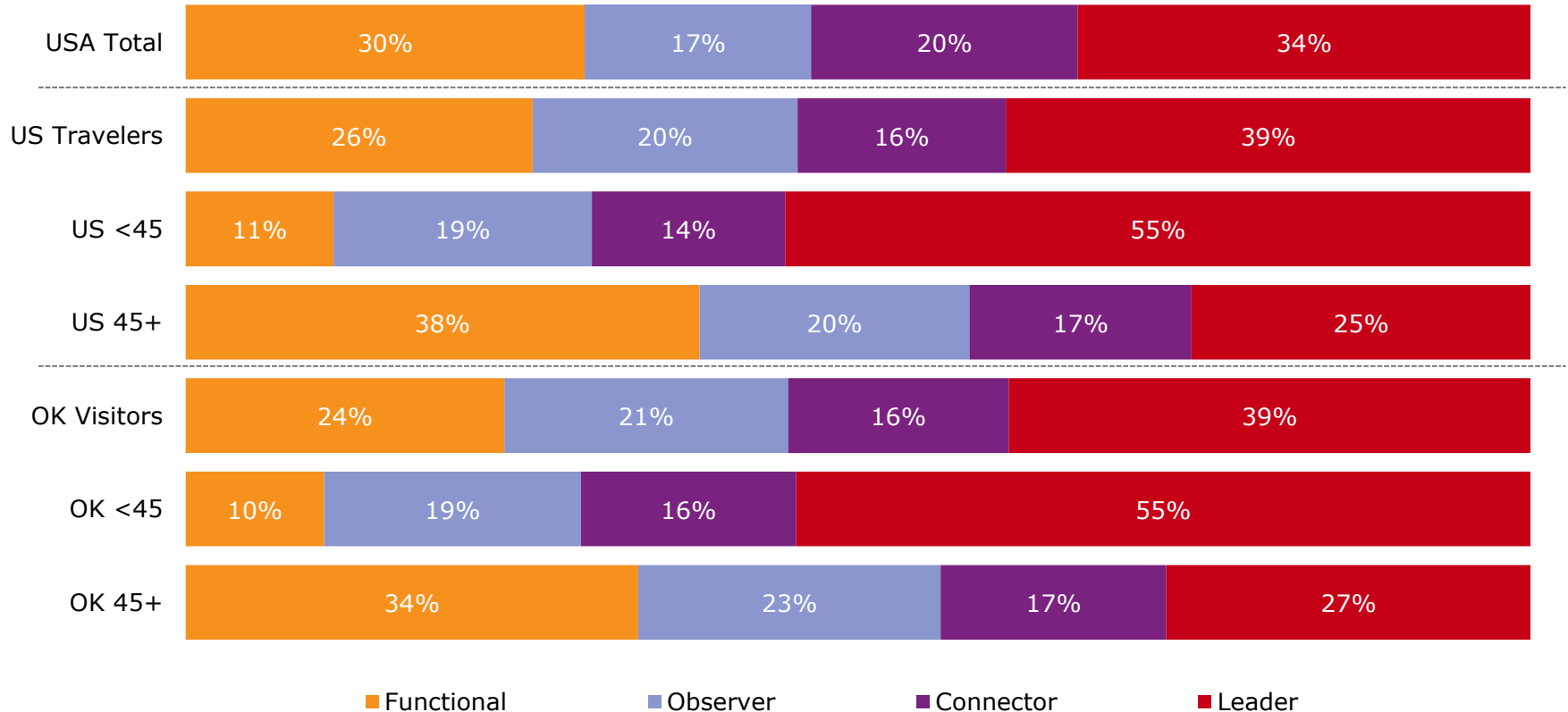
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Oklahoma visitors look similar to US travelers

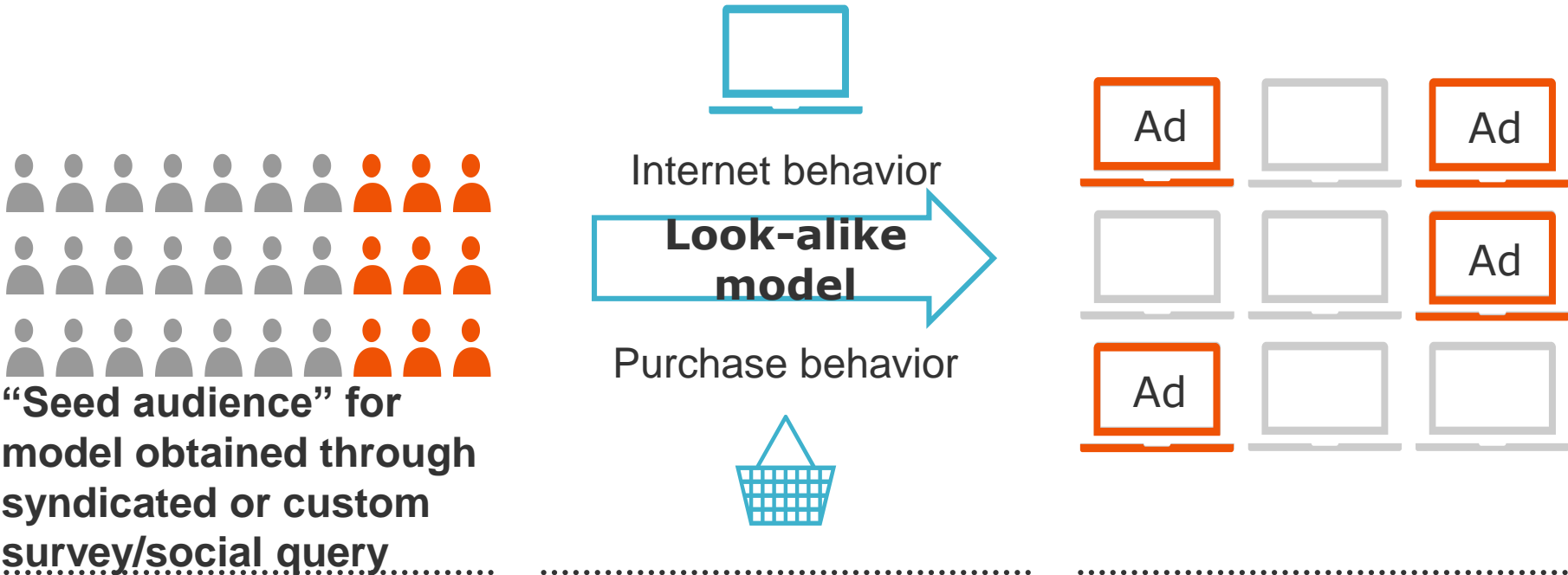
- Heavy usage of both digital and social channels explodes among younger travelers
- Oklahoma visitors just slightly exceed other US travelers on using technology (fewer functionals).



Source: US Digital Life General Report

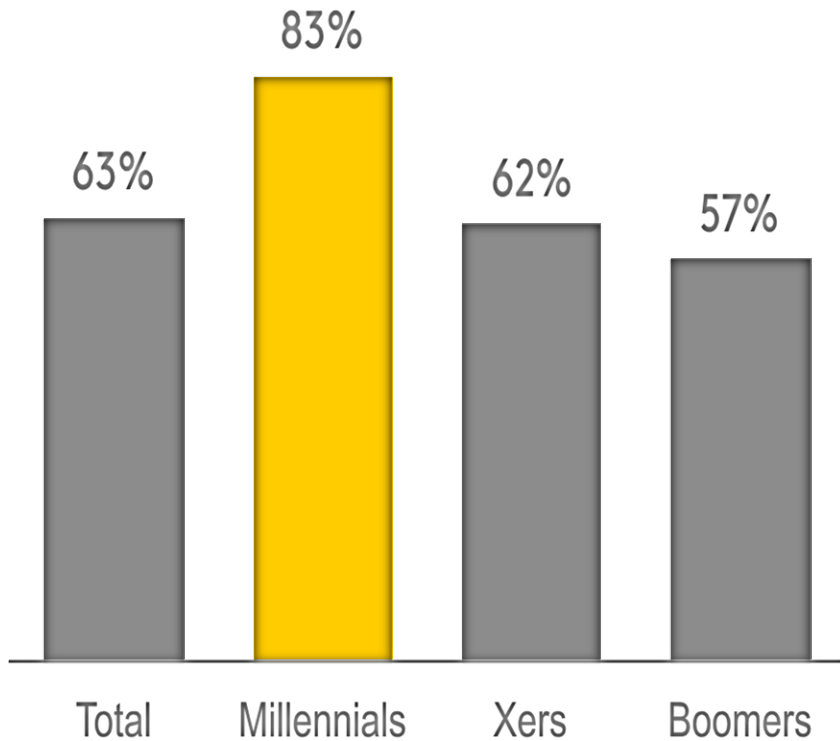


We can now activate attitudinal mindset through DMPs and look-alike models



Using Oklahoma City travelers as an example...

- You take the known travelers who traveled to OKC from TNS' TravelsAmerica data.
- Blow up these travelers to 5 million potential travelers.
- Focus your efforts only to the 5 million potential travelers.
- The sales lifts we are seeing are in the 20% range.



In favor of brands using past travel purchases to deliver more personalized travel experience

What does it all mean?

- 5 to 1
- Close in...shorter window
- Explore versus tour
- Newness
- Demos versus digital



Thank you

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