

Calendar Year 2015 – Oklahoma TravelsAmerica Visitor Profile Report



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TravelsAmerica Visitor Profile Report

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Contents

1		
Growth Summary	4	
2		
Executive Summary	7	
3		
Detailed Results	15	
4		
Share of Visitors	16	
5		
Trip Purpose/Source of Visits/Timing	19	
6		
Planning and Booking	23	
7		
Trip Characteristics	27	
8		
Competitive Environment	40	
9		
Satisfaction	46	
10		
Export/Import	50	



Contents

11

Connected Life 51

12

Demographics 56

13

Background and Research Methods 60

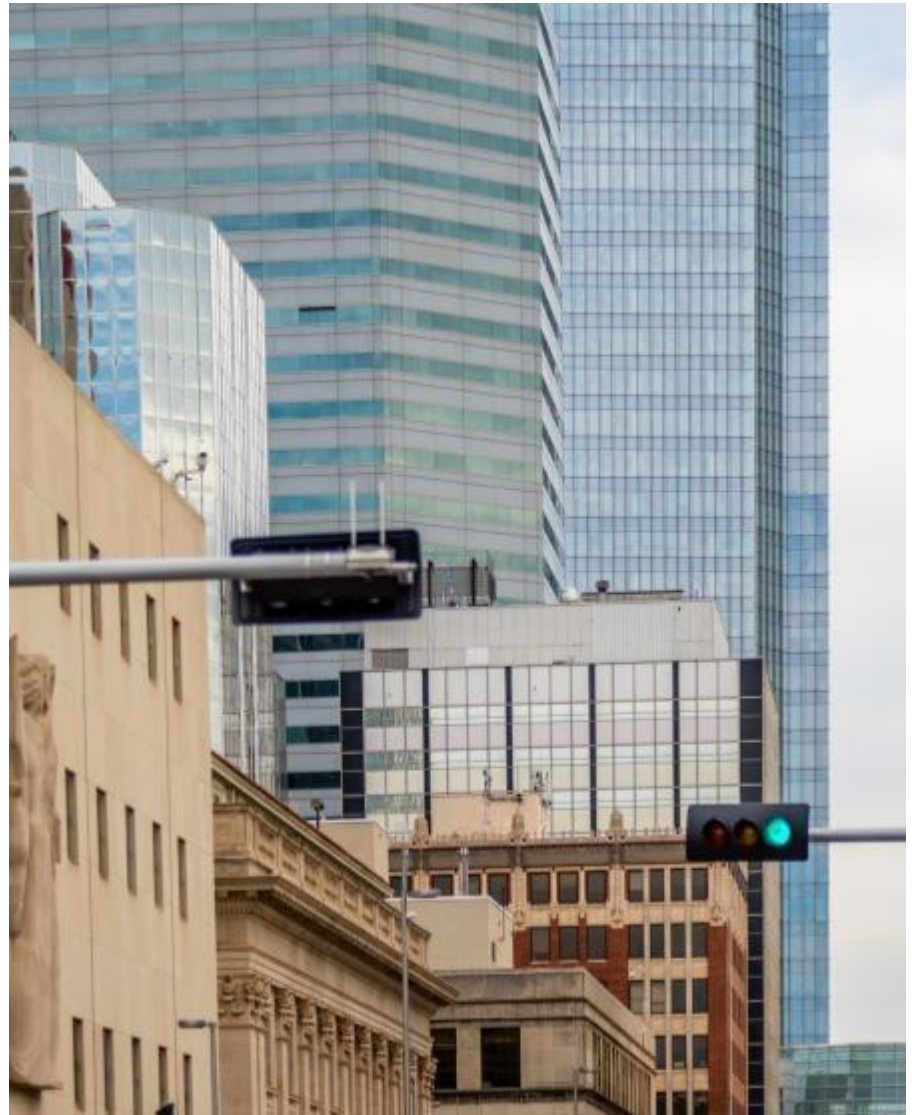
14

Case Study 66



1

Growth Summary



TNS Growth Map



Your business issues

- In 2014,* tourism contributed \$8.9 billion to Oklahoma's economy, generating \$627 million in local/state taxes and 95K 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 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
 - Advocate longer trips that would add to lodging and general tourism revenue.

*Latest info from travelok.com

Growth Summary



Growth insights

- 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.
- With nearly as many 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 *Adventure Sports enthusiasts* and relatively older *Sightseers* and *Parks/Gardens* attendees.
- Travel, more than any other industry, depends on the internet for research and purchase, making an online presence effective and essential for reaching potential visitors.
- Separately, the website's "Explore Oklahoma" headline can highlight activities that build synergy throughout various media.

Note: See glossary for activities describing each type (slide 63)

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 Oklahoma's numerous state/national parks (34 state parks and 6 national sites/areas/ trails) and opportunities to engage in *adventure sports*.
- Entice *sightseers* (both rural and urban) 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.
- Consider ways to tap residents and *Family/Friend/Reunion* visitors as ambassadors as well as encourage them to "Explore Oklahoma."
- Consider a theme (Explore Oklahoma?), in addition to the logo, to strengthen the synergy and already excellent online presence (such as Facebook/Twitter/Instagram and website) to reach potential travelers, particularly young adventure travelers.

2

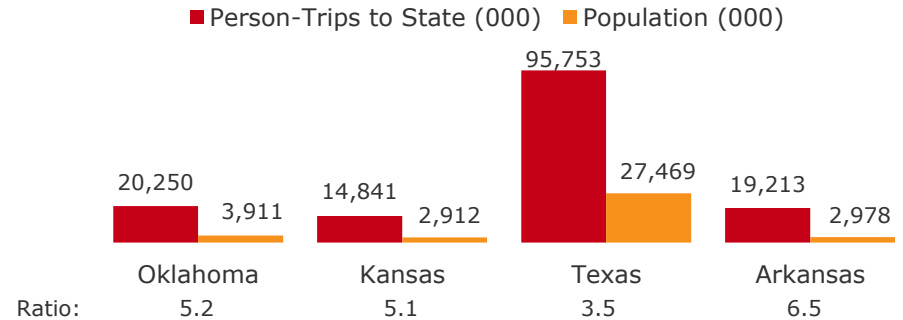
Executive Summary



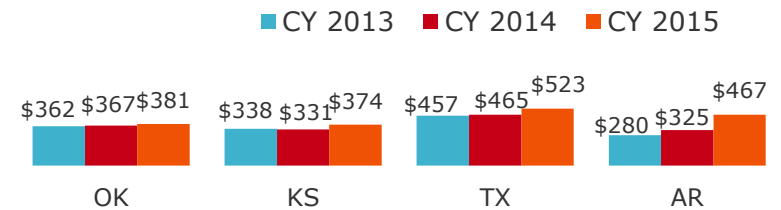
Tourism = Important to Oklahoma

- 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 5 visitors per person, shows Oklahoma as similar to Kansas and between Arkansas and Texas.
- Oklahoma visitors spend at competitive levels. All of these states post gains in spending from visitors from a year ago, especially Arkansas; Kansas recovers from last year's dip.
- Even with a decline in the "balance-of-trade," Oklahoma adds enough domestic spending to offset what residents spend by traveling elsewhere (import).
- The continued rise in "import" spending suggests that Oklahoma could re-emphasize its features to encourage residents (and out-of-state visitors, too) to spend more time and \$\$\$ in Oklahoma.

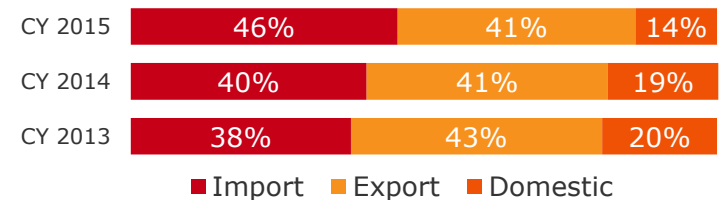
Visitors vs. Population



Total Spending



Balance of Trade



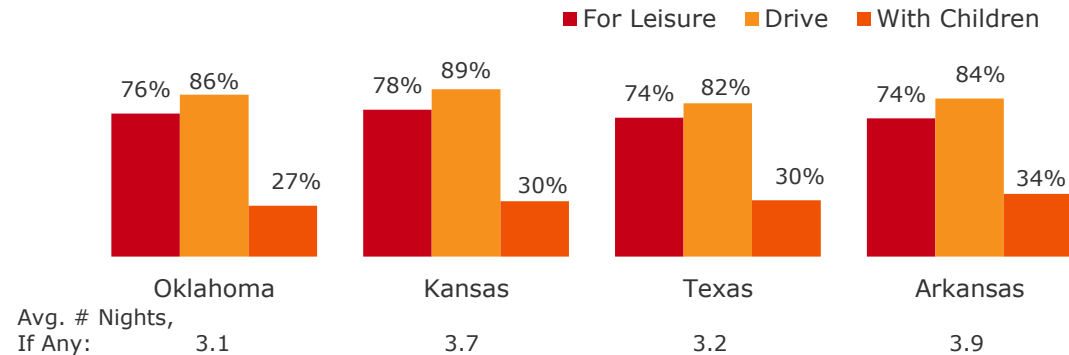
Import represents \$ leaving OK (residents traveling elsewhere)
 Export represents \$ coming into OK (non-residents to OK)
 Domestic represents \$ staying in OK (residents traveling in OK)

Why visitors come to Oklahoma; what they like

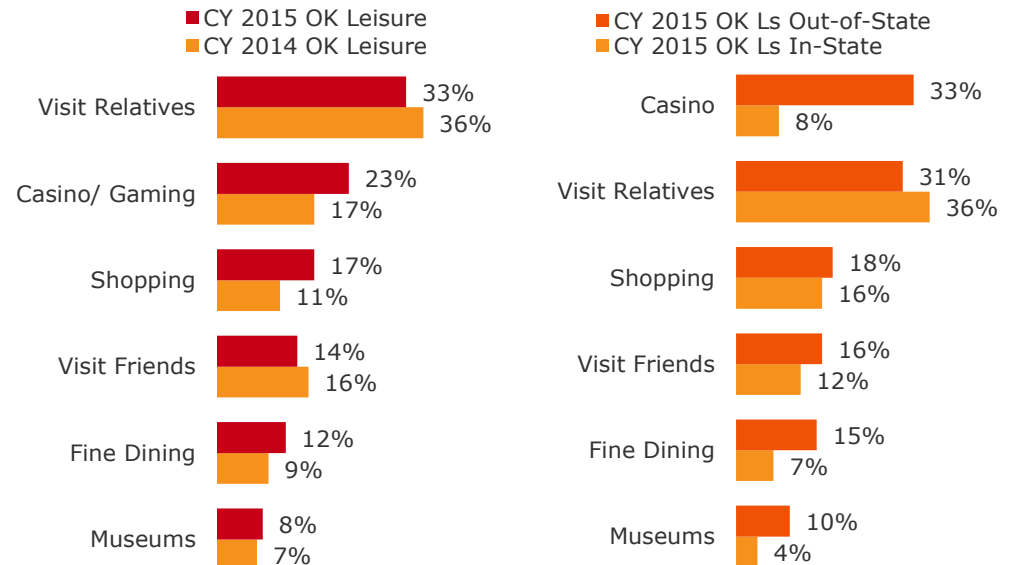
■ Similar to competitive states, Oklahoma primarily entertains leisure visitors, most visitors drive, and the average stay hovers between 3 and 4 nights. A quarter to a third of visitors to each of these states bring their children, a bit less for those coming to Oklahoma.

■ Both in- and out-of-state visitors primarily visit relatives, but other choices vary, with out-of-state visitors more likely to take advantage of Oklahoma's tourism choices – gaming, dining, museums, and shown in more detail later in the report, sightseeing, history, and outdoor (fishing/national parks) options.

Trip Purpose, Mode, Companions, Overnights



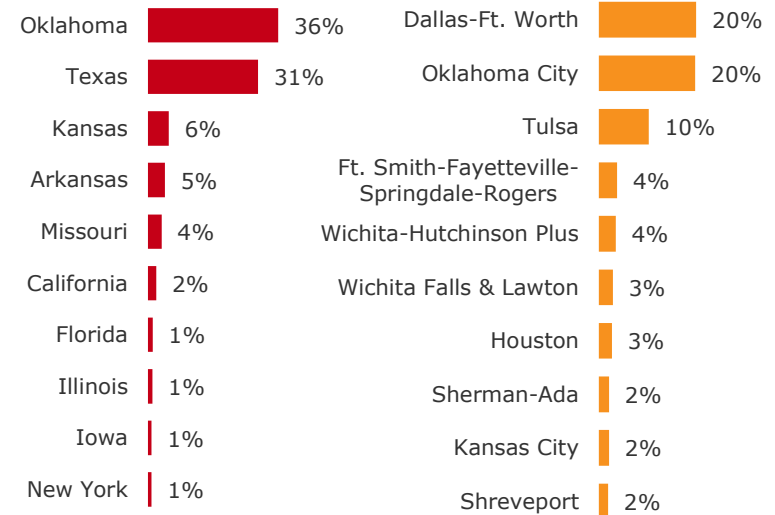
What Visitors Choose to Do



From where they come ... to where they go

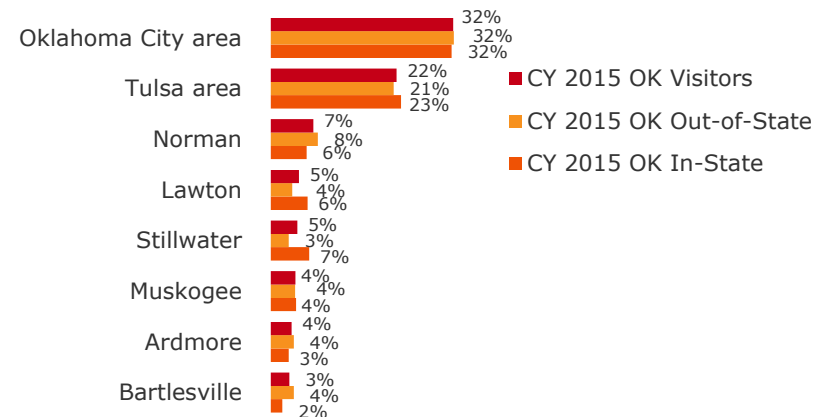
- Oklahoma primarily draws visitors from within its borders and Texas, with a boost from Kansas, Arkansas, and Missouri. Similar to many other destinations, key source markets often border Oklahoma.

From Where (CY 2015) ...

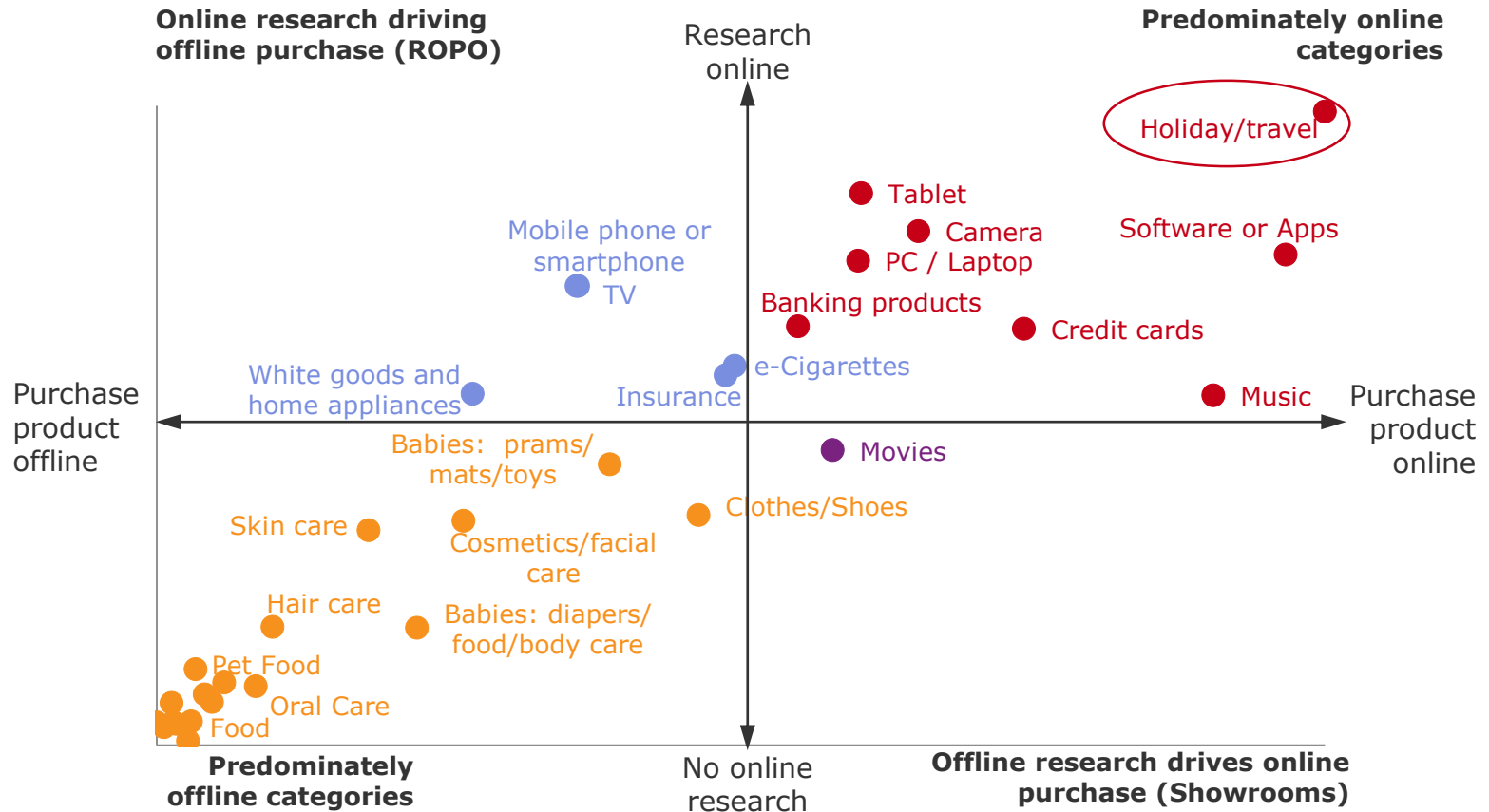


- The largest Oklahoma cities attract the most visitors, regardless of where the visitors live. Few differences appear by in-state or out-of-state residence.

To Where ...



Travel leads for products researched **and** purchased online, followed by technology and financial products

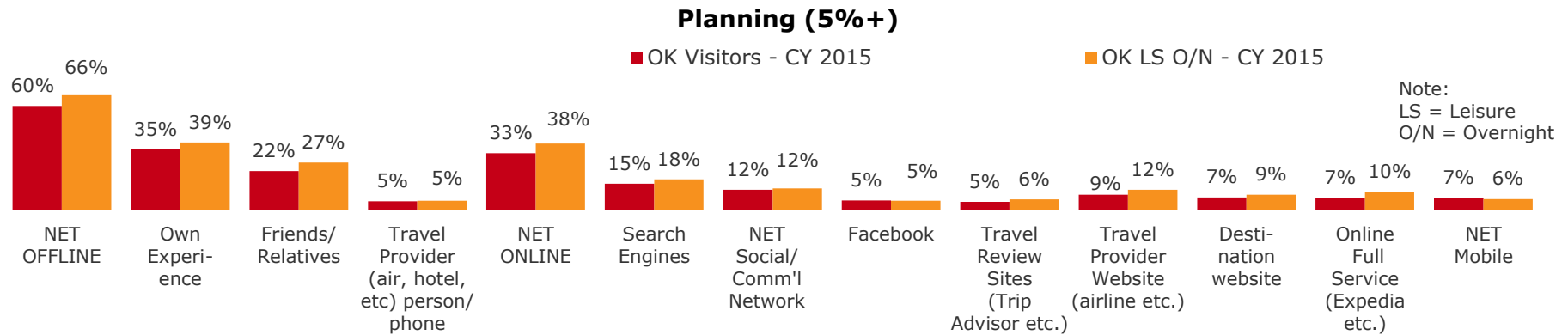


Source: TNS Connected Life

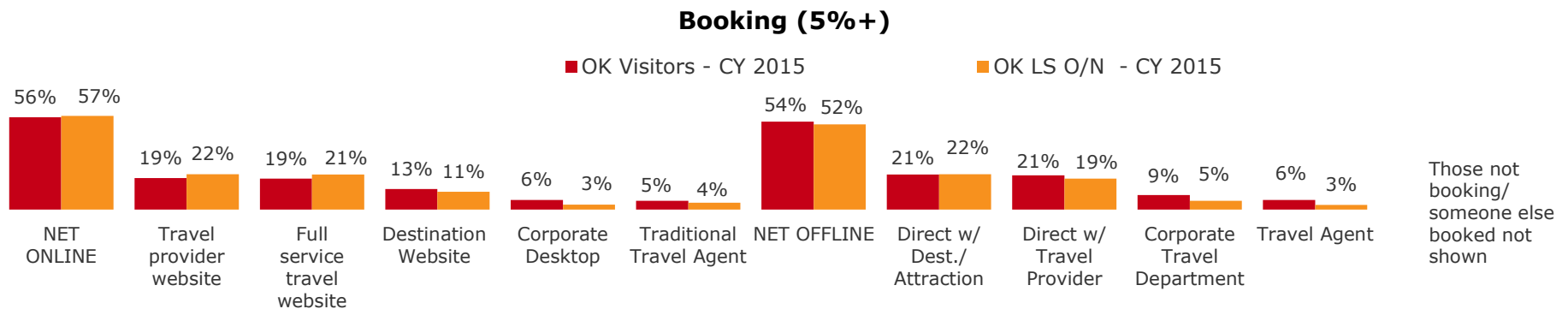


For planning and booking trips, Oklahoma visitors ...

- Most commonly use their own experience or acquire information by word-of-mouth, either directly from friends/relatives or via social/commercial networking; search engines are popular as well.



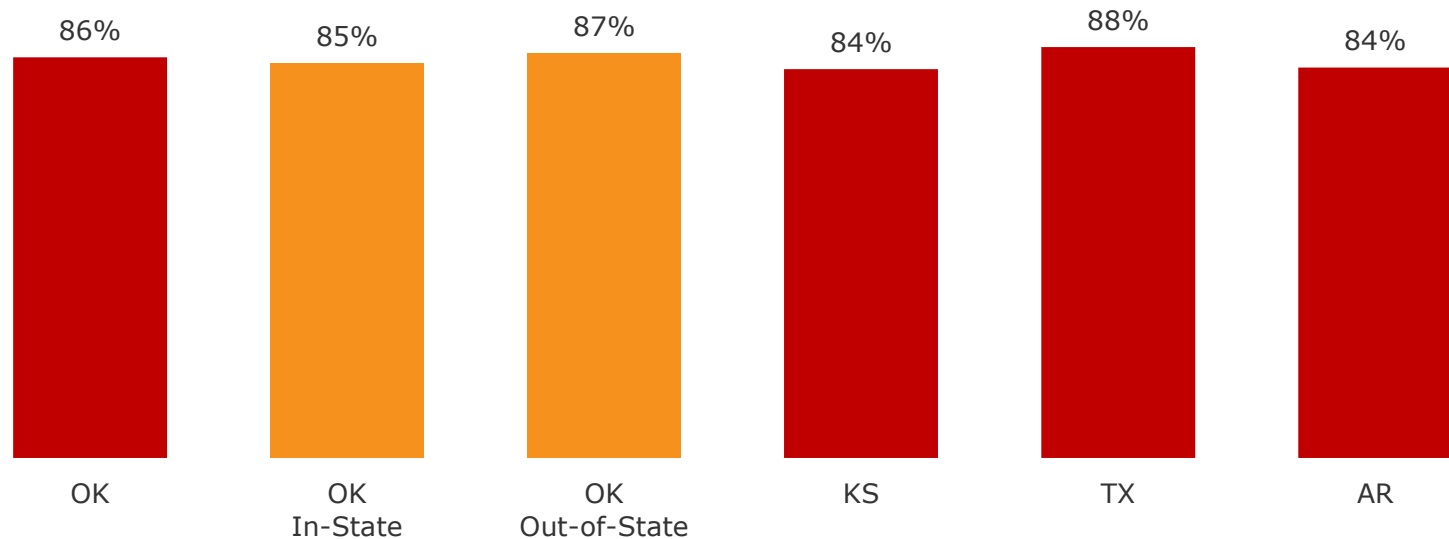
- Likely book directly with a destination or a travel provider, either on- or off-line.



Oklahoma sends visitors home happy

- Oklahoma satisfies visitors, slightly more so than competitors Kansas or Arkansas (nearly identical to last year); residents and non-residents are nearly equally satisfied.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2015)



Sizing and revenue by activity engaged

- Those choosing *entertainment/amusement* (particularly gaming and dining) 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 outdoor features: *adventure sports, parks/gardens, and sightseeing*.

% Active in Each Type		Average Spend	Average Age	% of Total \$
Entertainment/Amusement	40%	\$531	50	30%
Family Activities/Reunion	38%	\$367	47	20
Art & Culture	18%	\$544	48	14
Sightseeing	11%	\$590	50	10
Nature/Outdoor Activities	11%	\$534	44	9
Sports and Recreation	11%	\$537	46	8
Parks and Gardens	7%	\$633	49	6
Adventure Sports	3%	\$797	39	3

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

*See glossary for activities describing each niche (slide 65)



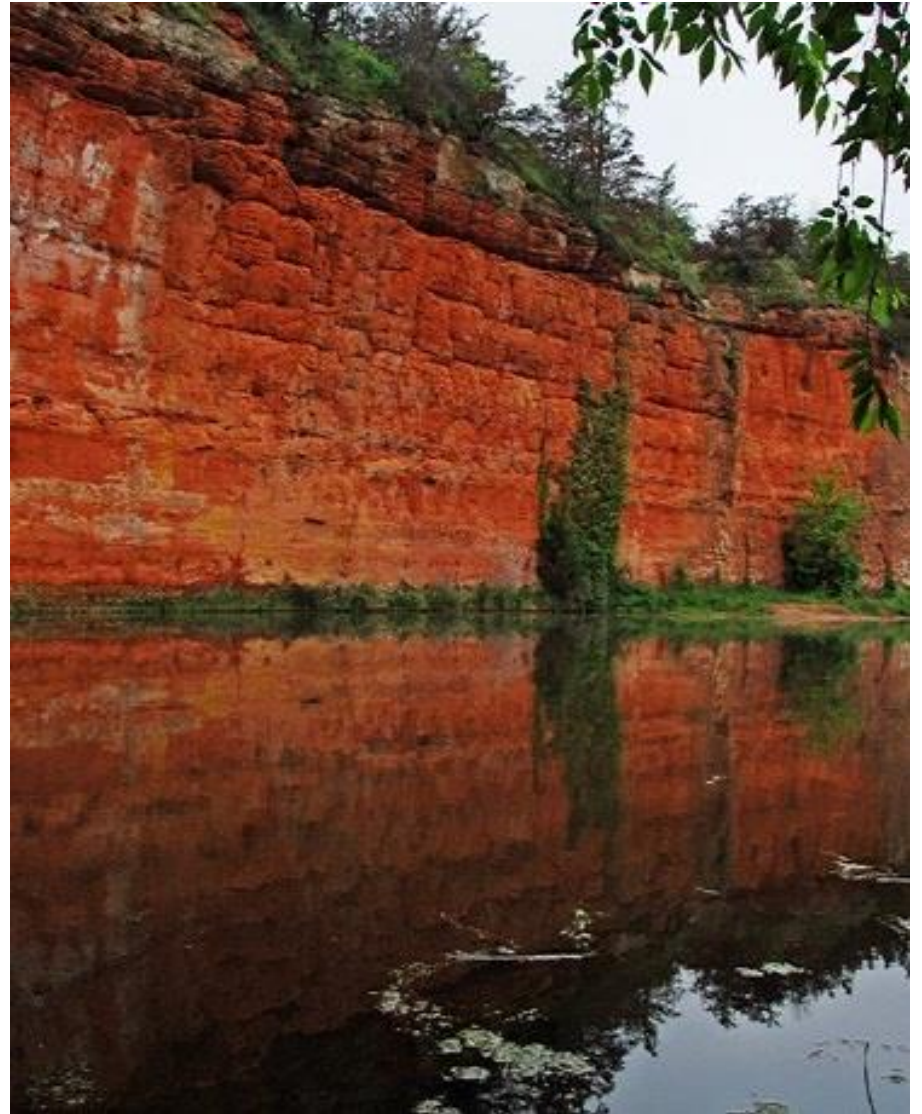
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Detailed Results



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Share of Visitors



Oklahoma hosts almost 22 million visitors annually

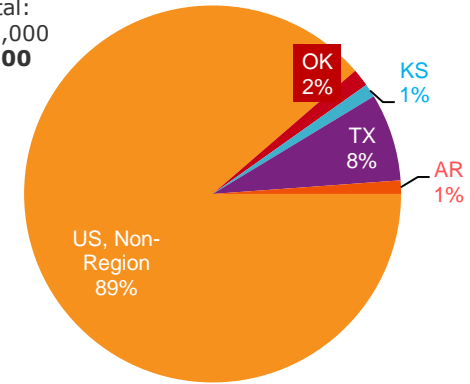
Person-trips; trips = 50+ miles from home (one-way) or spent 1+ nights away

Market Overview:

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

Visitation – % of Person-Trips: Four States

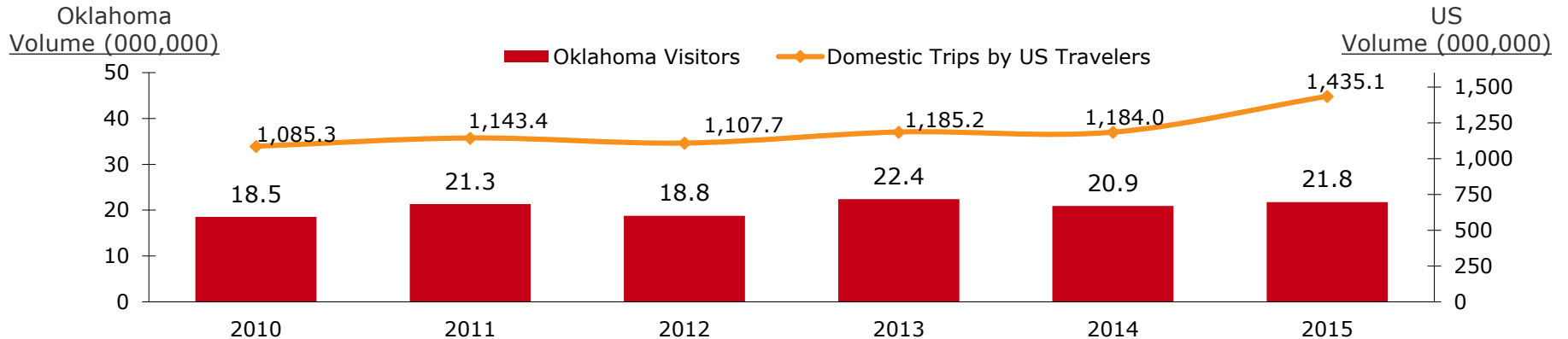
Person-Trips Total:
US = 1,435,069,000
OK = 21,763,000



Travel and Tourism Impact

State	Population - Census (2015 estimate)	Number of US Visitors to OK in CY 2015
Oklahoma	3,751,351	21,763,000

Market History:



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



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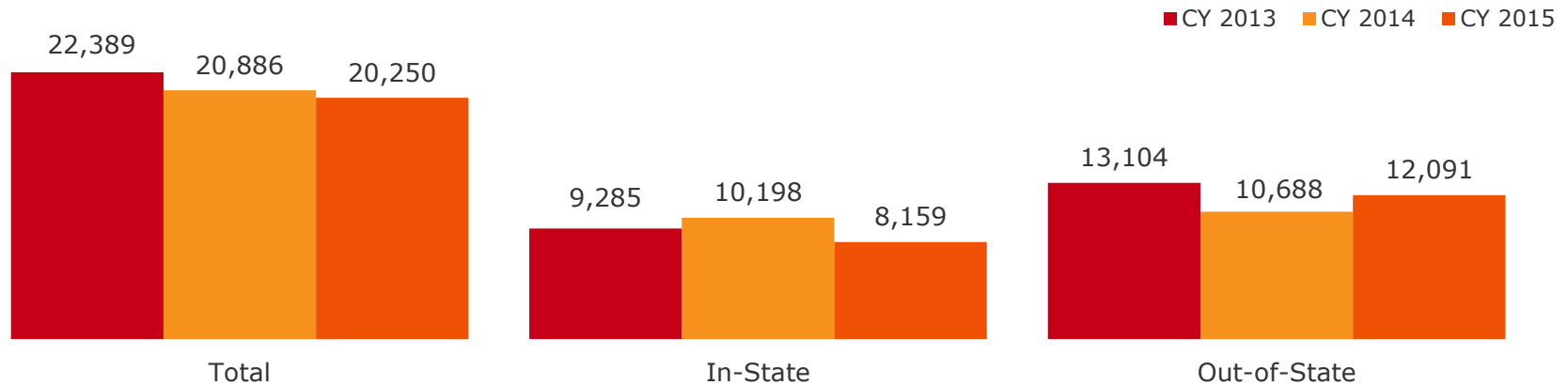


Oklahoma draws many out-of-staters for leisure

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

- In-state visitation slips while out-of-state visitor volume partially recovers from last year's dip. Most still primarily come for leisure.

Visitation – Person-Trips (000): Oklahoma Visitors



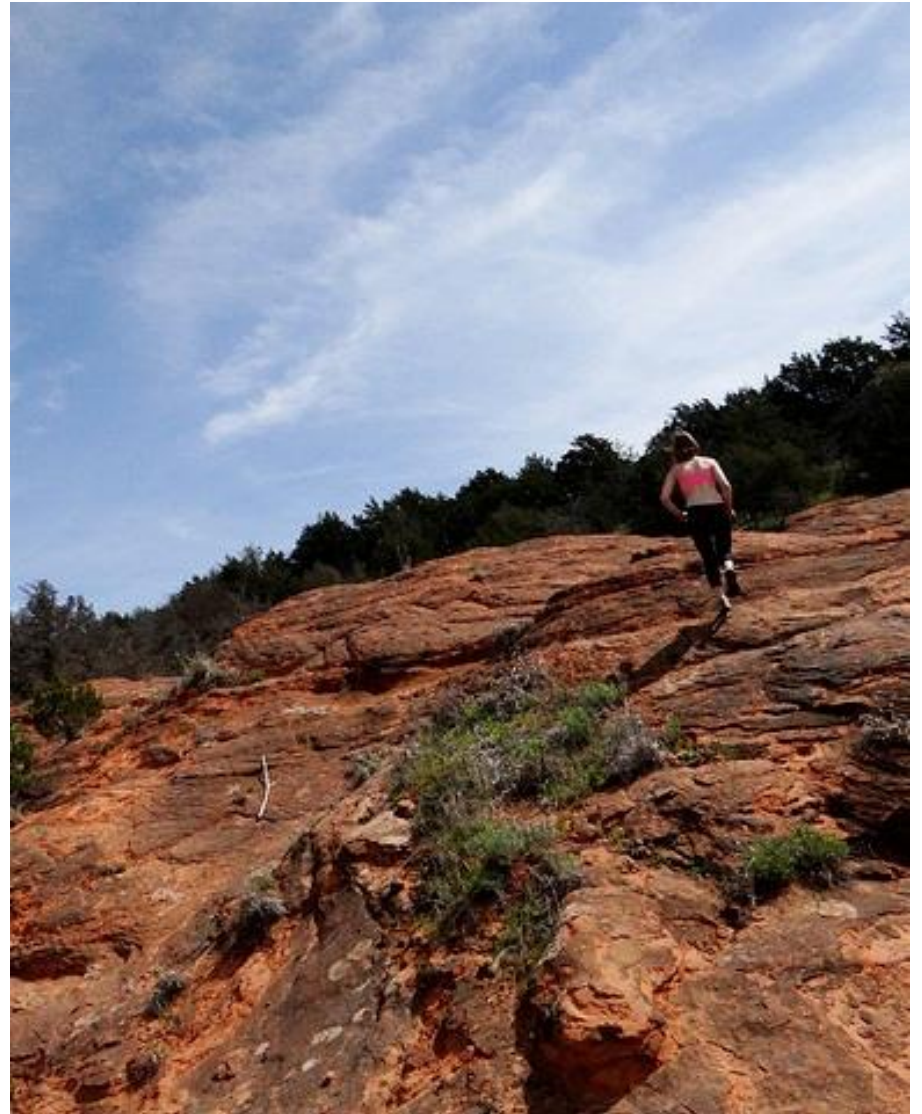
	CY 2013	CY 2014	CY 2015	CY 2013	CY 2014	CY 2015	CY 2013	CY 2014	CY 2015
Leisure:	15,672 (70%)	14,620 (70%)	15,451 (76%)	5,849 (63%)	6,832 (67%)	5,932 (73%)	9,959 (76%)	7,802 (73%)	9,504 (79%)
Business:	3,134 (14%)	2,506 (12%)	2,025 (10%)	1,486 (16%)	1,224 (12%)	881 (11%)	1,572 (12%)	1,389 (13%)	1,149 (10%)
Unclassified:	3,582 (16%)	3,759 (18%)	2,774 (14%)	1,950 (21%)	2,142 (21%)	1,346 (17%)	1,572 (12%)	1,496 (14%)	1,427 (12%)

Q4a. Please indicate US state(s) visited



5

Trip Purpose/Source of Visits/Timing



Visitors usually visit Oklahoma for leisure ...

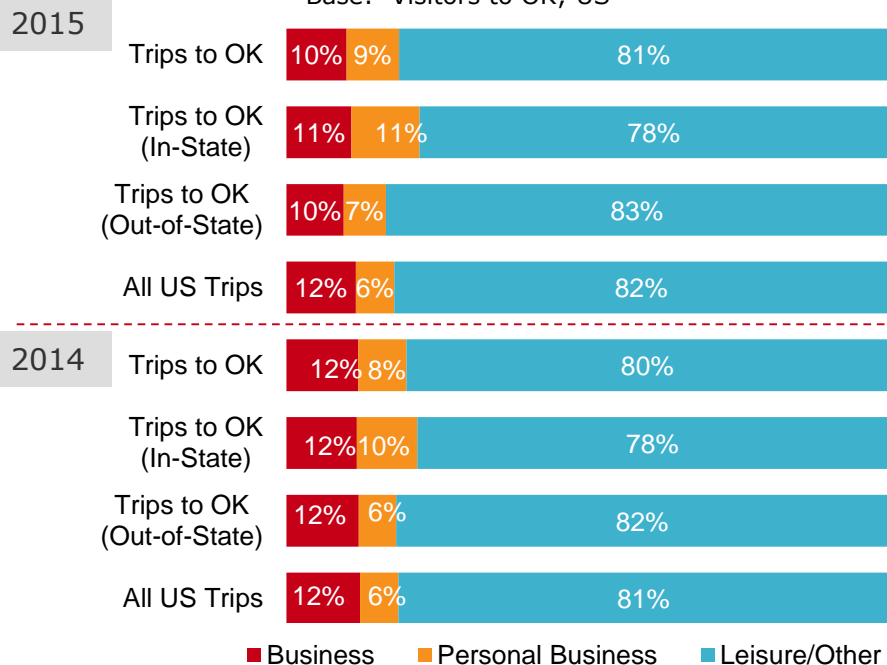
- However, a notable share (10%) comes for business
- Oklahoma residents represent about a third of leisure visitors, somewhat more of business travelers (45%).

Trip/Visitor Characteristics

% of Visitors to State

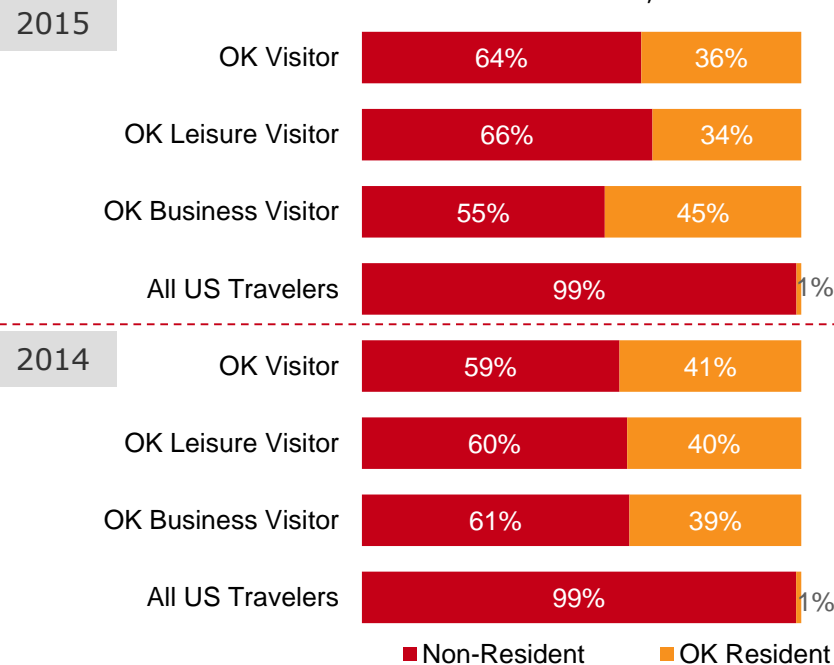
TYPE OF TRIP

Base: Visitors to OK; US



LOCATION OF RESIDENCE

Base: Visitors to OK; US



Q1b. Which of the following was the PRIMARY purpose of trip to . . . (Household Trip Level - demo wtd)

Panel: Residence of visitors (Household Level)

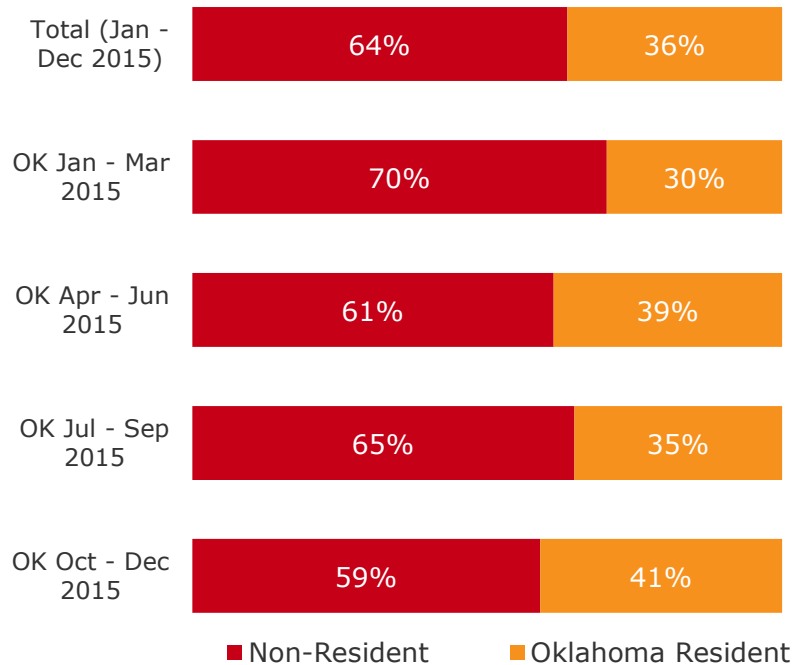


Visitation peaks during Spring and Summer

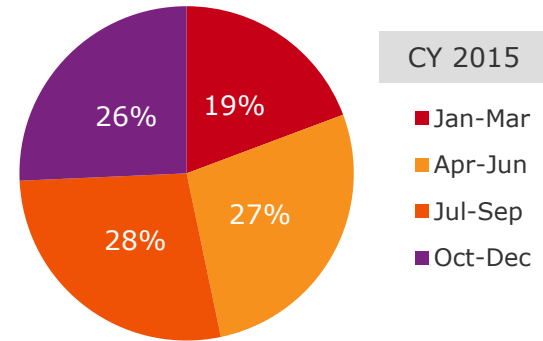
- Except for a dip in winter (30%), Oklahoma residents represent the same share of visitors (35% - 41%) throughout the year.

SOURCE of Oklahoma VISITORS by QUARTER

Base: Oklahoma Visitors

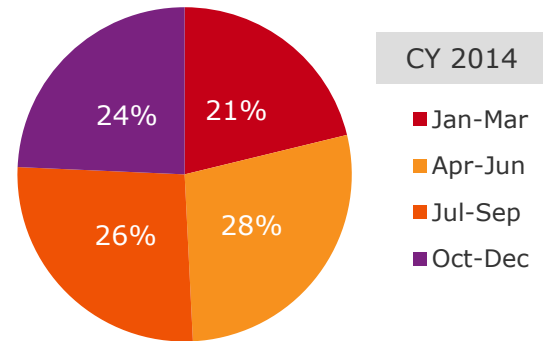


Panel: State/DMA residence of those who visited Oklahoma (Household Level)



CY 2015

- Jan-Mar
- Apr-Jun
- Jul-Sep
- Oct-Dec



CY 2014

- Jan-Mar
- Apr-Jun
- Jul-Sep
- Oct-Dec

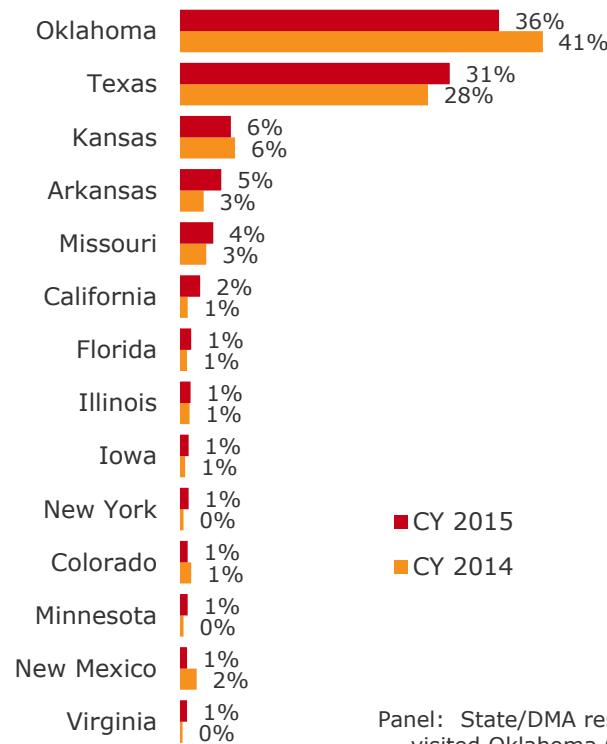
Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)



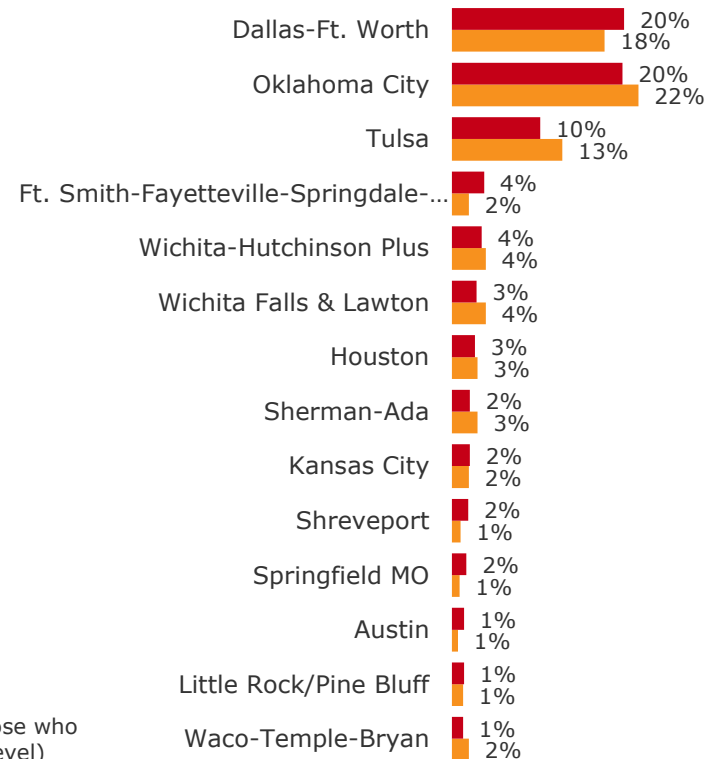
Neighboring Texas dominates Oklahoma's out-of-state visitor source markets

- 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)



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



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



6

Planning and Booking



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)

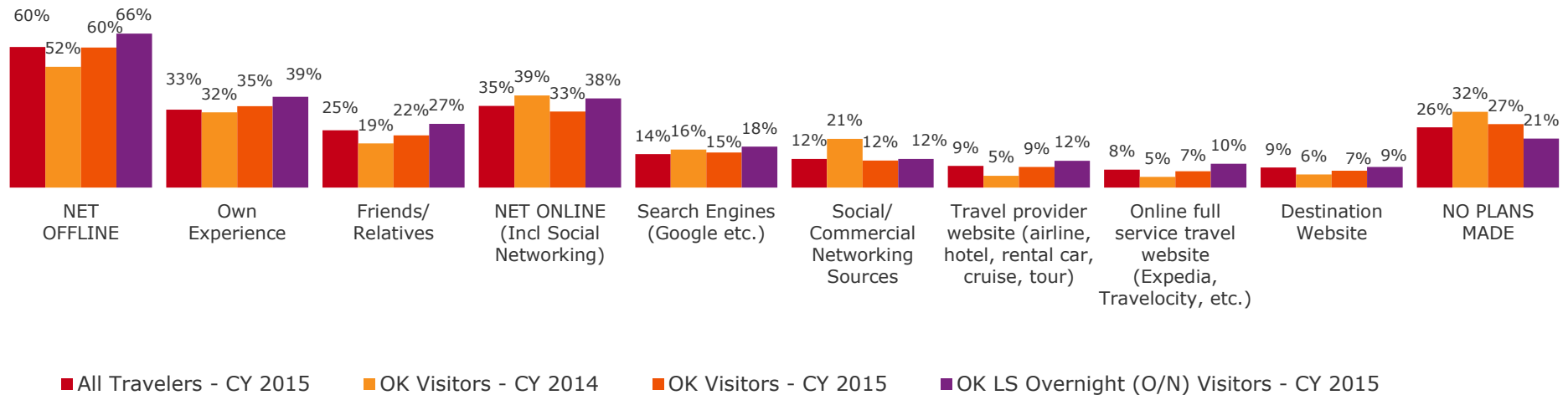


Visitors most commonly use on their own experience to plan an Oklahoma trip

- 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



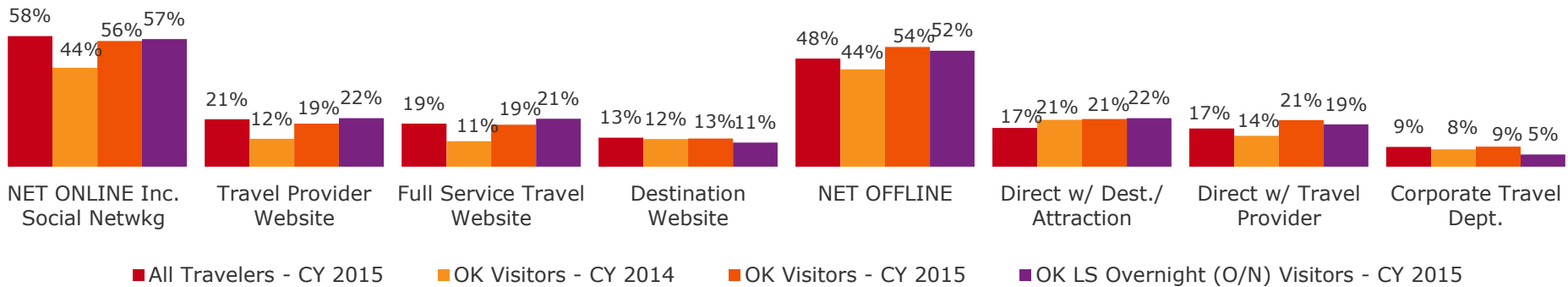
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Oklahoma visitors book via the same channels as other travelers (generally climbing from last year)

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



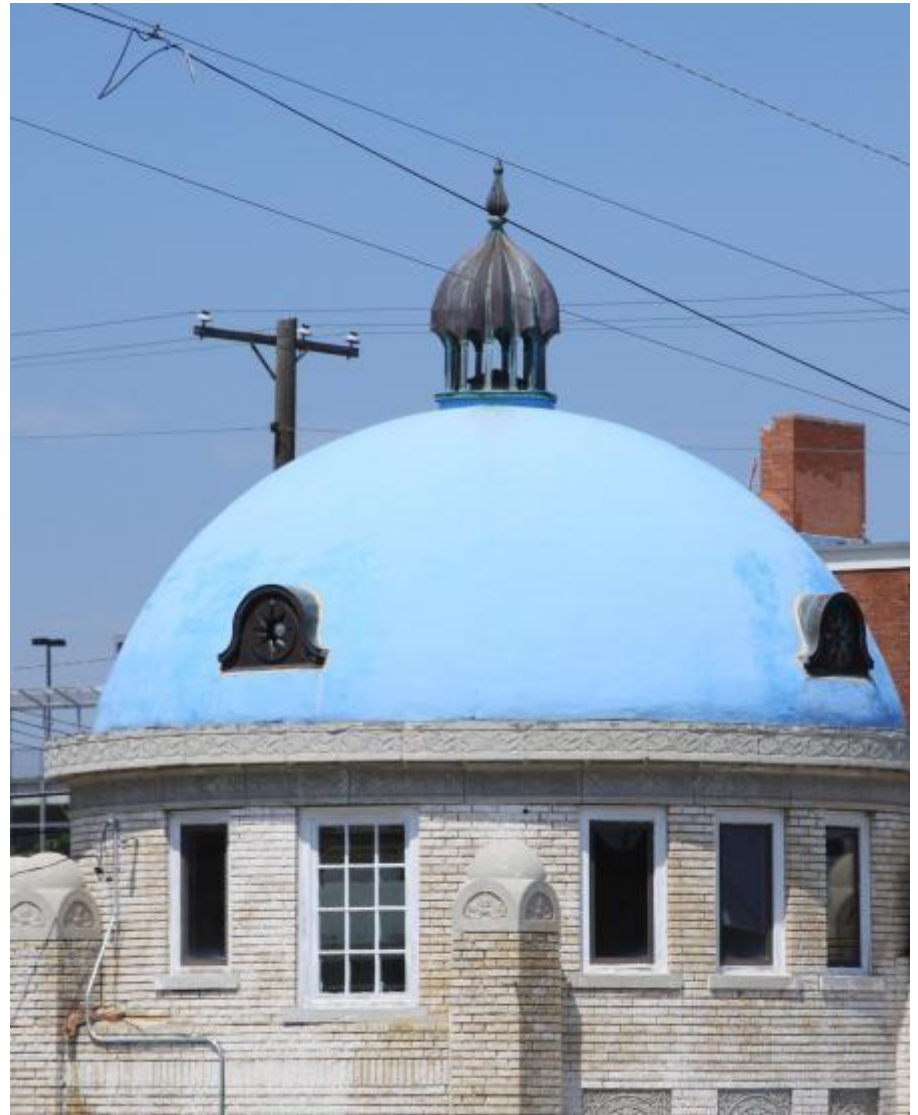
Note: LS = Leisure O/N = Overnight

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



7

Trip Characteristics



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

- Very few fly (about half as many as overall US travelers: 7% vs. 13%)
- Out-of-state visitors spend an extra day in Oklahoma (2.9 vs. 2.0 nights for in-staters).

Trip Choices (Trip Level)	All US Travelers CY 2015	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	79%	76%	100%	100%	73%	79%
Visit Friends/Relatives	43	42	60	39	45	40
Entertainment/Sightsee	13	14	15	32	10	17
Outdoor Recreation	8	6	9	5	5	7
Business	12	10	-	-	11	10
Personal Business/Other	10	14	-	-	17	12
PRIMARY MODE						
% Own Auto/Truck	74%	82%	82%	97%	93%	76%
% Air Travel	13	7	7	1	1	10

Lodging (State Level)	All US Travelers CY 2015	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)	2.6	2.6	2.6	-	2.0	2.9
Private Home	1.0	1.0	1.2	-	0.8	1.2
Hotel/Motel	1.1	1.1	0.9	-	0.9	1.2
Other	0.5	0.5	0.5	-	0.3	0.5

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 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)



Visitors often come with just one companion

- However, many (27%) bring children
- Children most often come along during the summer and the winter holidays.

Trip Characteristics (Trip Level)	All US Travelers CY 2015	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	2.7	2.6	2.2	2.7	2.7	2.6	2.6
% Travel in Pairs	40%	43%	30%	43%	42%	41%	44%
% Travel w/ Children	28	27	18	29	31	31	25
Avg # Kids Inc. 0	0.6	0.5	0.3	0.5	0.6	0.6	0.5
Avg # Kids Exc. 0	2.0	1.8	1.8	1.9	1.9	1.8	1.9

Trip Characteristics (Trip Level)	All OK Visitors	Q1 Jan – Mar 2014	Q2 Apr – Jun 2014	Q3 Jul – Sep 2014	Q4 Oct – Dec 2014
AVERAGE # IN TRAVEL PARTY (Q3a)	2.6	2.6	2.5	2.7	2.6
% Travel in Pairs	43%	43%	41%	46%	41%
% Traveling with Children	27	19	30	25	33
Avg. # of Children on Trip Inc. Zero	0.5	0.3	0.5	0.5	0.7
Avg. # of Children on Trip Exc. Zero	1.8	1.6	1.6	2.1	2.0

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

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)

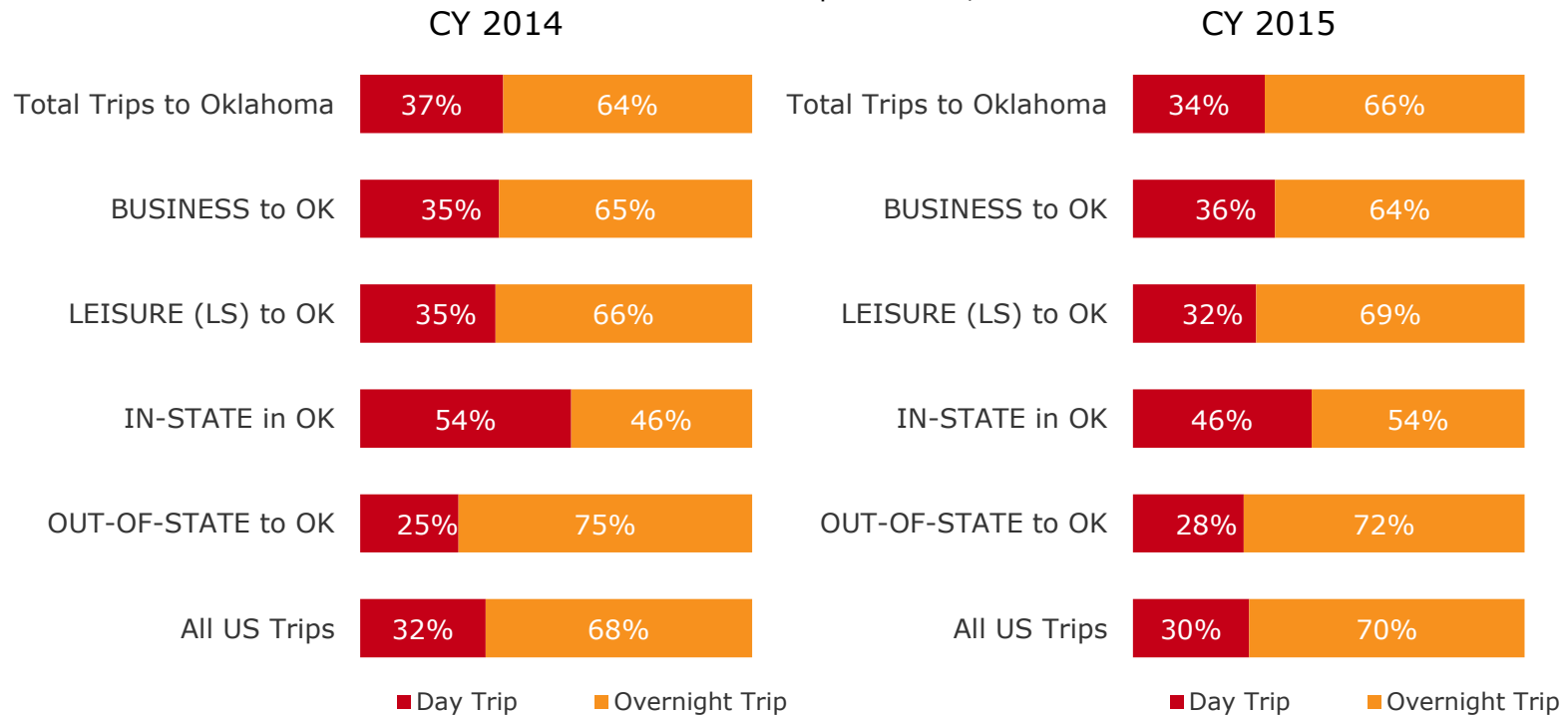


Two-thirds of visitors spend the night – just slightly fewer than the US average

- 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



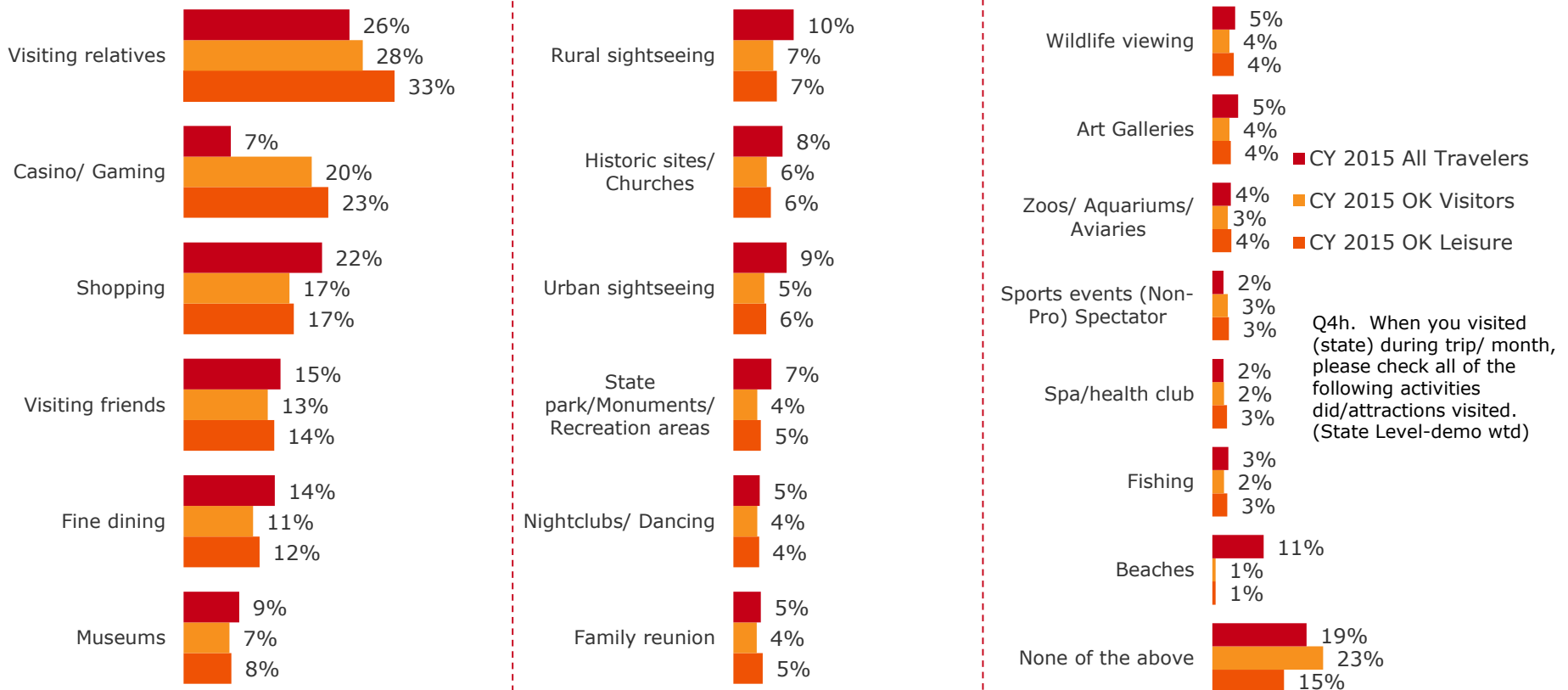
Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)



Oklahoma travelers primarily visit friends/relatives

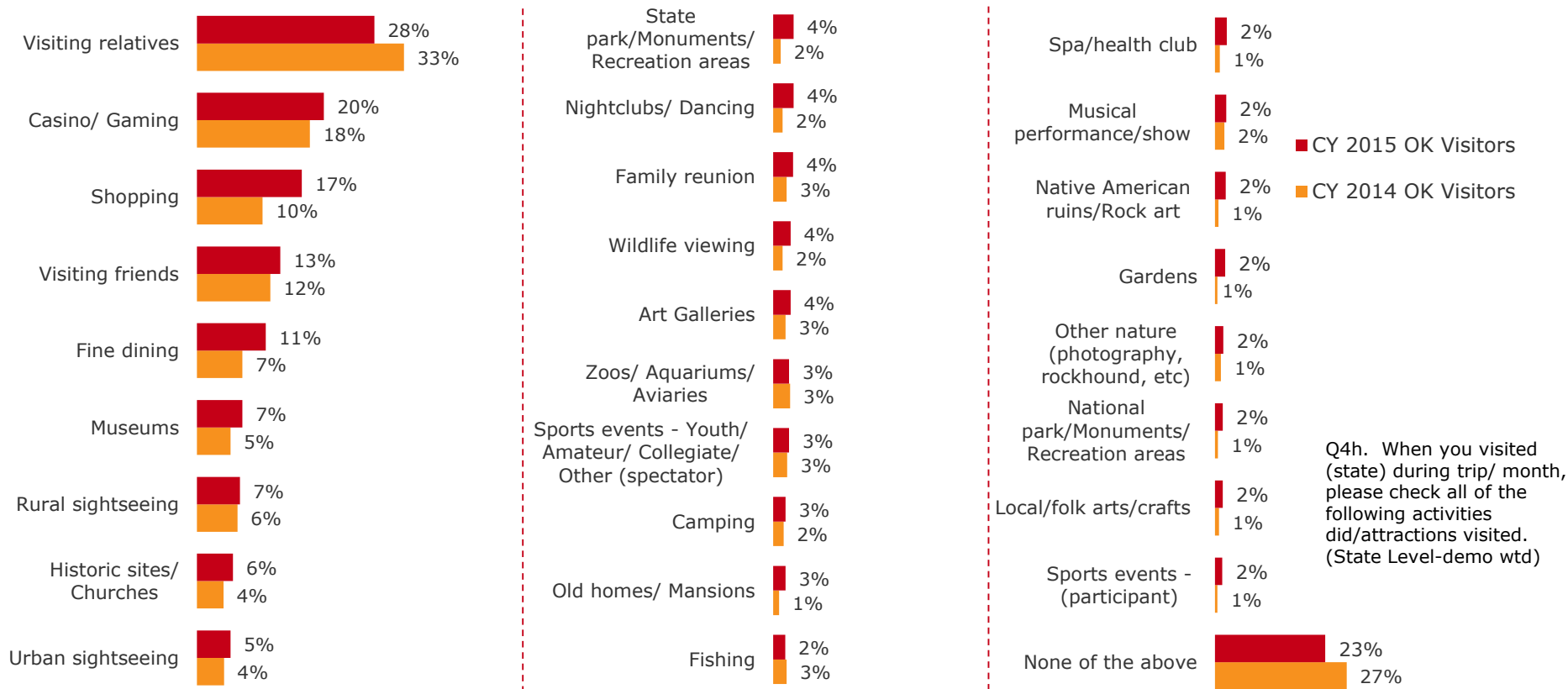
- Compared to other US travelers, a much larger share of travelers come for casinos and gaming while fewer shop, enjoy fine dining, or visit beaches.

CY 2015 % Activities Participated/Attractions
 Ranked by 2015 Oklahoma Visitors (Activities with <3% for Oklahoma not shown)



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

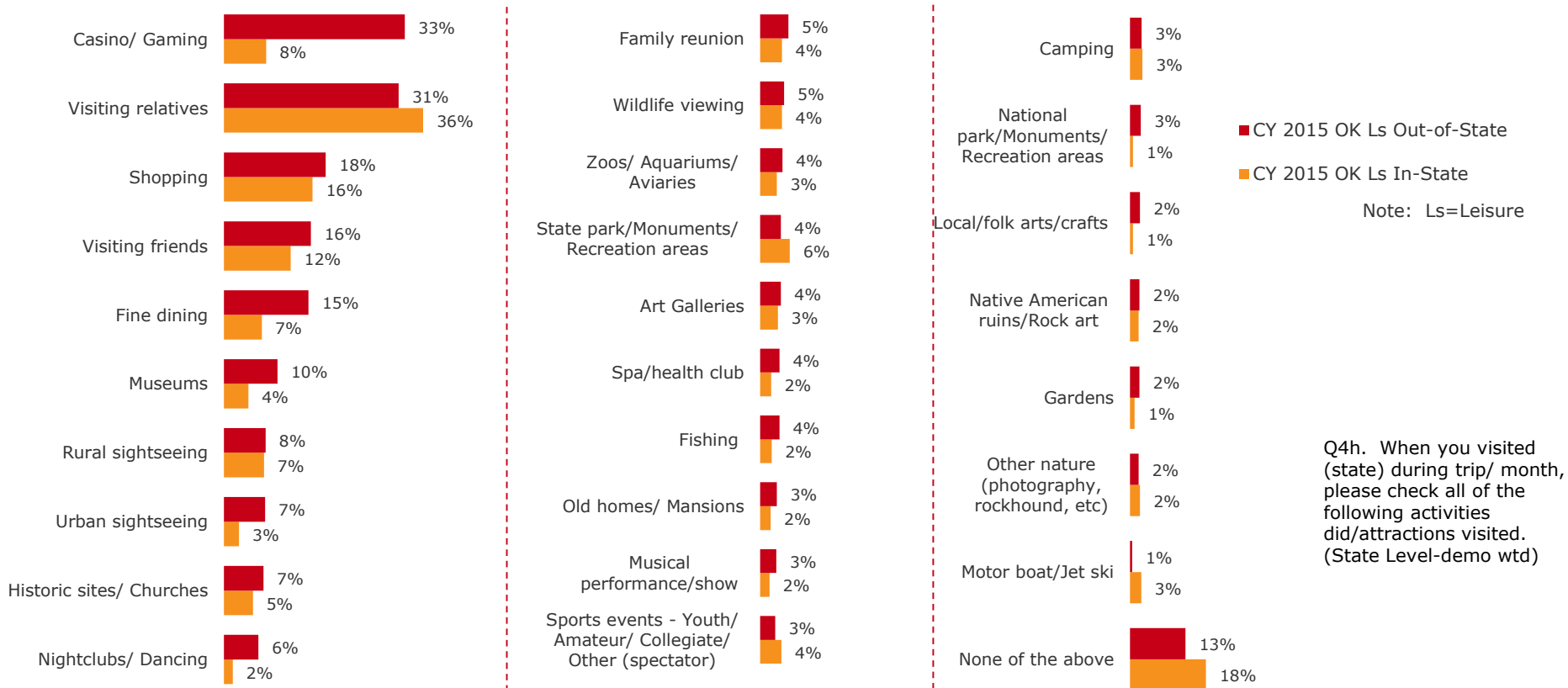
Trend: % Activities Participated/Attractions by Oklahoma Visitors
Ranked by 2015 Total Oklahoma Visitors



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



Over half of leisure travelers visit friends/relatives and often stay with them; business travelers stay longer and usually in hotels/motels

OKLAHOMA VISITORS Trip Choices (Trip Level)	Total OK 2013	Total OK 2014	Total OK 2015	Leisure 2015	Business 2015	Day Trip 2015	Overnight 2015
PRIMARY TRIP PURPOSE							
NET Leisure/Personal	73%	72%	76%	100%	-	72%	78%
Visit Friends/Relatives	38	41	42	55	-	28	46
Entertainment/Sightsee	13	13	14	19	-	23	11
Outdoor Recreation	5	5	6	8	-	4	7
Business	13	12	10	-	100	7	11
Personal Bs/Other	14	16	14	-	-	22	11
PRIMARY MODE							
% Own Auto/Truck*	81%	86%	82%	86%	60%	95%	78%
% Air Travel	7	5	7%	6	16	0.4	9
AVG # IN TRAVEL PARTY	3.0	2.8	2.6	2.7	2.2	2.4	2.6
# IN TRAVEL PARTY - HOUSEHOLD	1.9	2.0	2.1	2.2	1.6	2.0	2.1
% Traveling Solo	28%	29%	23%	20%	45%	17%	24%
% Traveling With Children	21	26	27	29	18	22	29
OKLAHOMA VISITORS Lodging (State Level)							
AVG # NIGHTS (if any)	2.6	3.2	2.6	2.6	2.8	-	2.6
Private Home	1.2	1.6	1.0	1.2	0.2	-	1.0
Hotel/Motel	1.1	1.1	1.1	0.9	2.4	-	1.1
Other	0.3	0.5	0.5	0.5	0.2	-	0.5

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

LS=Leisure
O/N = Overnight

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

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

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



Not only choosing more “touristy” activities (lucrative for OK), out-of-state visitors also stay longer

OKLAHOMA VISITORS Trip Choices (Trip Level)	Total OK 2013	Total OK 2014	Total OK 2015	In-State Visitors 2015	Out-of-State Visitors 2015
PRIMARY TRIP PURPOSE					
NET Leisure/Personal	73%	72%	76%	73%	79%
Visit Friends/Relatives	38	41	42	45	40
Entertainment/Sightsee	13	13	14	10	17
Outdoor Recreation	5	5	6	5	7
Business	13	12	10	11	10
Personal Bs/Other	14	16	14	17	12
PRIMARY MODE					
% Own Auto/Truck*	81%	86%	82%	93%	76%
% Air Travel	7	5	7	1	10
AVG # IN TRAVEL PARTY	3.0	2.8	2.6	2.6	2.6
# IN TRAVEL PARTY - HOUSEHOLD	1.9	2.0	2.1	2.1	2.1
% Traveling Solo	28%	29%	23%	22%	23%
% Traveling With Children	21	26	27	31	25
OKLAHOMA VISITORS Lodging (State Level)					
AVG # NIGHTS (if any)	2.6	3.2	2.6	2.0	2.9
Private Home	1.2	1.6	1.0	0.8	1.2
Hotel/Motel	1.1	1.1	1.1	0.9	1.2
Other	0.3	0.5	0.5	0.3	0.5

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

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

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

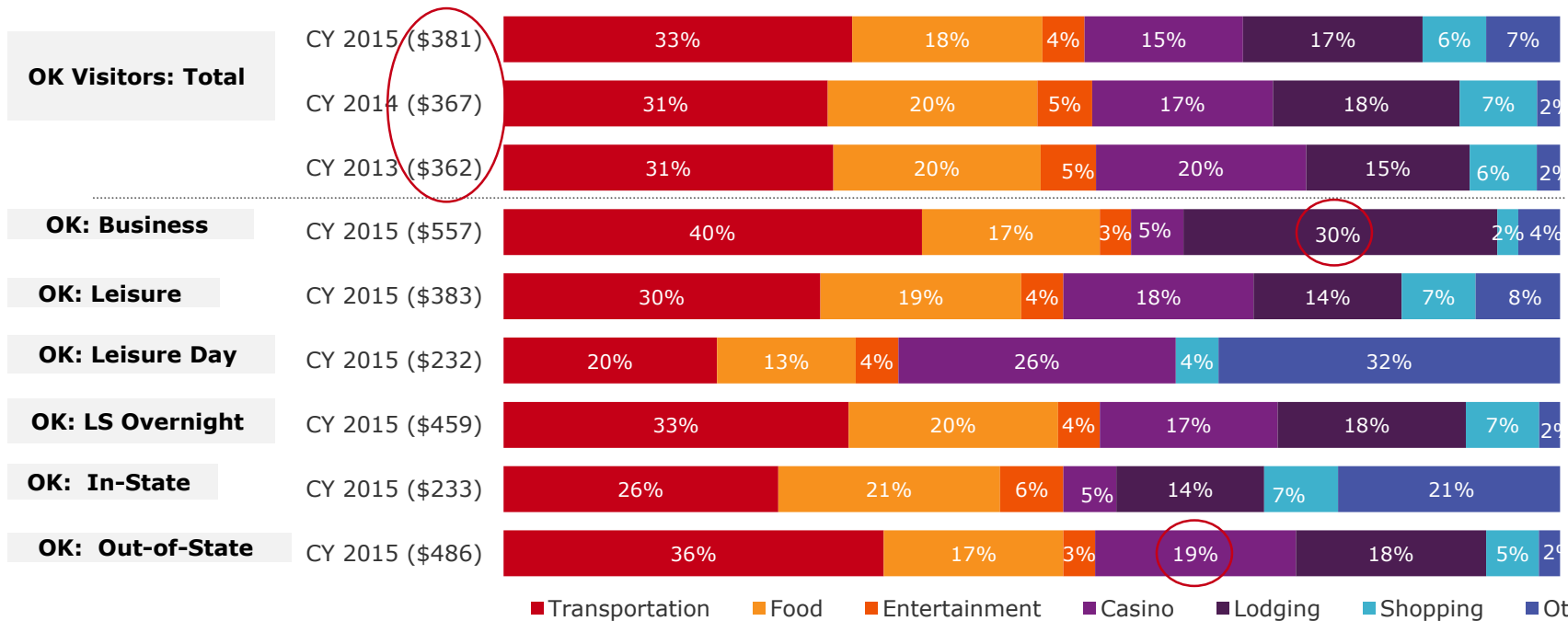
Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).



Out-of-staters and business travelers spend the most

- But, choices differ: Out-of-staters spend more on casinos; business travelers buy accommodations
- Total spending slowly and steadily climbs.

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



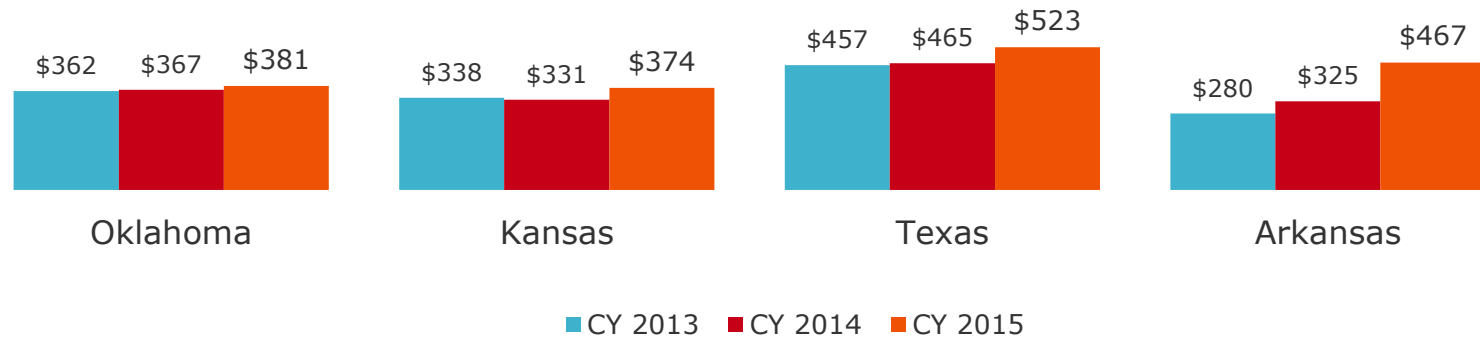
Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.

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

Oklahoma visitors spend slightly more than those going to Kansas or Arkansas

- With more urban activities available, visitors spend more in Texas than in competing destinations.

Average Spending in State, CY 2015
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

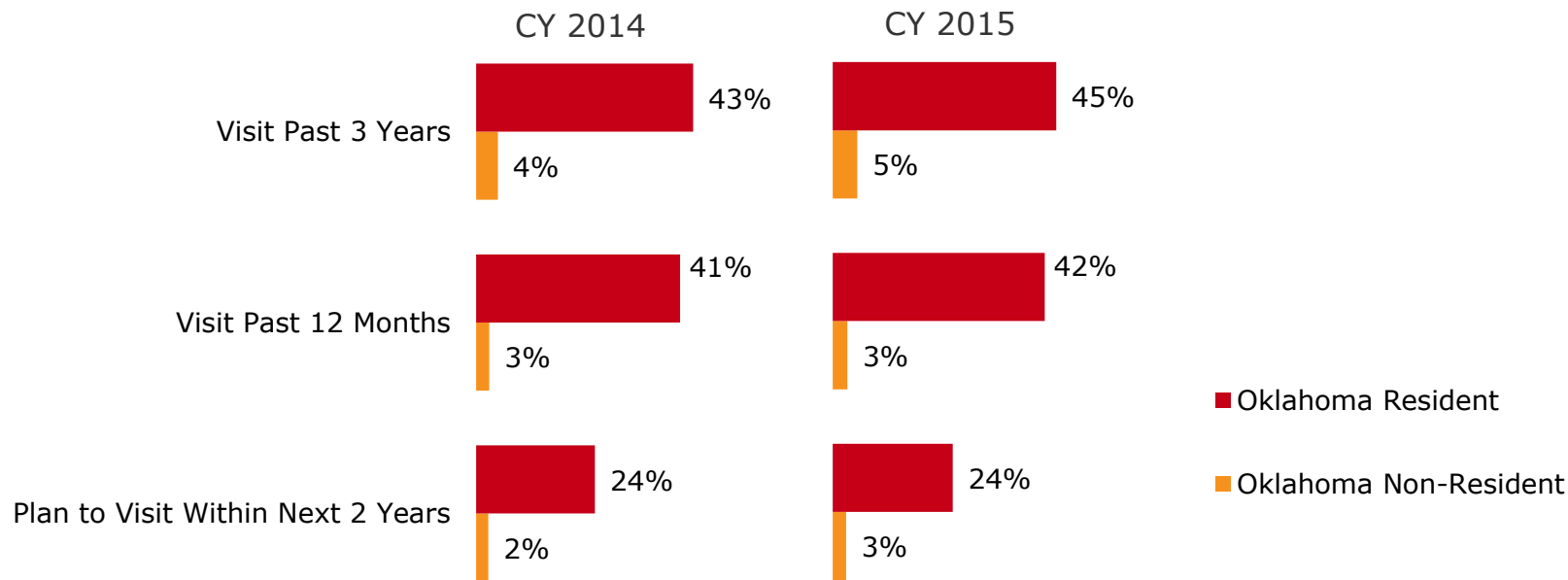
Competitive Environment



Oklahoma draws a large share of visitors from residents

- Nearly 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.

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 lead in share of visitors

- Residents and non-residents of Oklahoma choose very similar destinations.

Top Oklahoma Destinations

% Oklahoma Visitors Selecting Area (ranked by CY 2015)

All Oklahoma Visitors	CY 2013	CY 2014	CY 2015	Oklahoma Residents	CY 2013	CY 2014	CY 2015	Non-Oklahoma Residents	CY 2013	CY 2014	CY 2015
Oklahoma City area	29%	31%	32%	Oklahoma City area	32%	29%	32%	Oklahoma City area	27%	32%	32%
Tulsa area	22	24	22	Tulsa area OK	22	23	23	Tulsa area	22	24	21
Norman	7	6	7	Stillwater OK	6	5	7	Norman	6	8	8
Lawton	4	5	5	Lawton OK	3	4	6	Muskogee	3	3	4
Stillwater	3	4	5	Norman OK	9	4	6	Ardmore	3	5	4
Muskogee	4	3	4	Muskogee OK	4	3	4	Bartlesville	2	3	4
Ardmore	3	3	4	Ardmore OK	2	3	3	Lawton	4	5	4
Bartlesville	2	2	3	Bartlesville OK	2	1	2	Stillwater	2	2	3

Note: Respondents may select more than one destination (percentages may sum to more than 100%) Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

Each state has a key city or two that attract the most visitors

Top Destinations Within State

% Visitors Selecting Area (Each State Ranked)

OK Visitors	CY 2015	KS Visitors	CY 2015	TX Visitors (3%+)	CY 2015	AR Visitors	CY 2015
Oklahoma City	32%	Kansas City Area	31%	Dallas area	22%	Little Rock	30%
Tulsa area	22	Wichita	23	Houston	19	Hot Springs	16
Norman	7	Topeka	15	Austin	14	Fayetteville	15
Lawton	5	Salina	8	San Antonio	13	Fort Smith	10
Stillwater	5	Lawrence	7	Fort Worth area	7	Eureka Springs	8
Muskogee	4	Manhattan	6	Galveston	4	Texarkana	6
Ardmore	4	Dodge City	4	Corpus Christi	4	Pine Bluff	4
Bartlesville	3	Hutchinson	3	Amarillo	3		
		Emporia	2	Waco	3		

Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)



Proximity defines competition

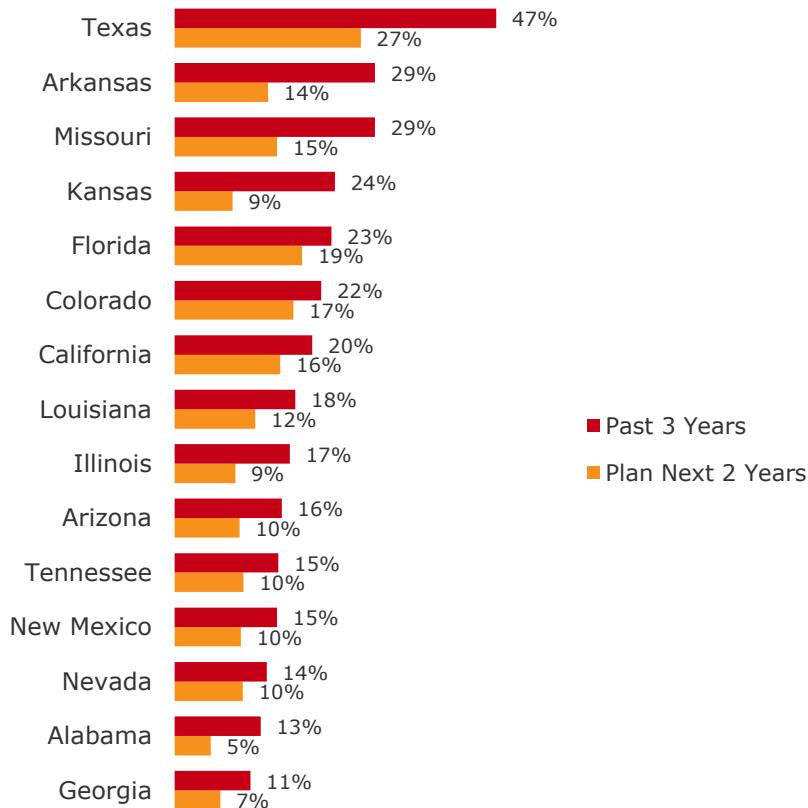
- The top four competitive states (past visits) border Oklahoma
- Texas takes the top spot for past visits, future intent, and for three of the top five competitive cities.

Other Areas Visited by Oklahoma Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

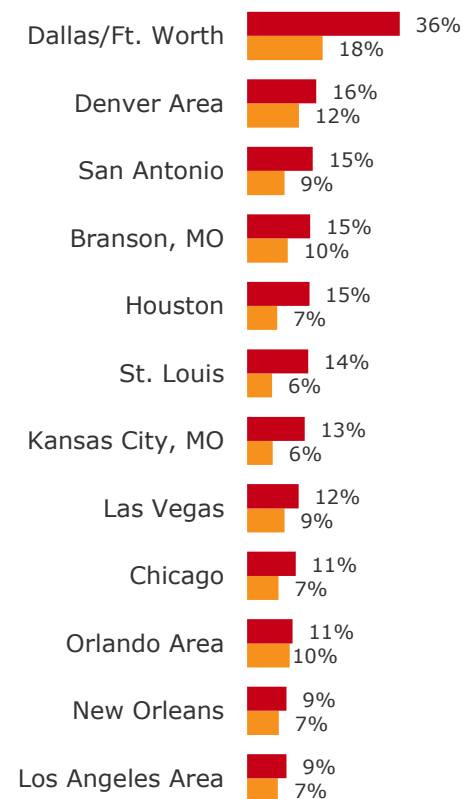
Top States

Base: Visited Oklahoma (Household Level)



Top Cities

Base: Visited Oklahoma (Household Level)



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

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)



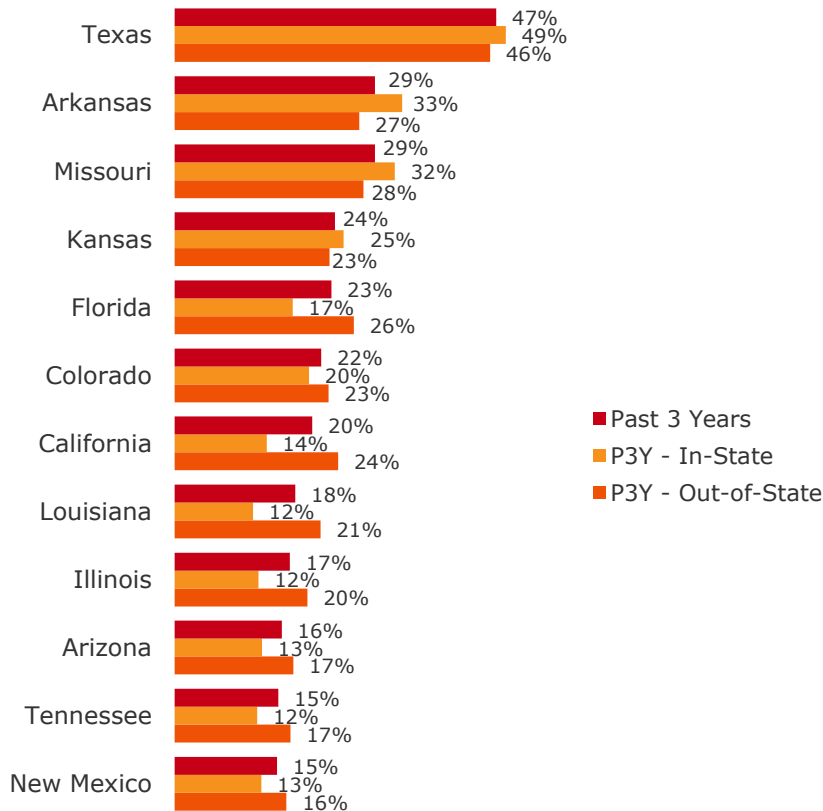
Out-of-staters visit a broader variety of destinations

- 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

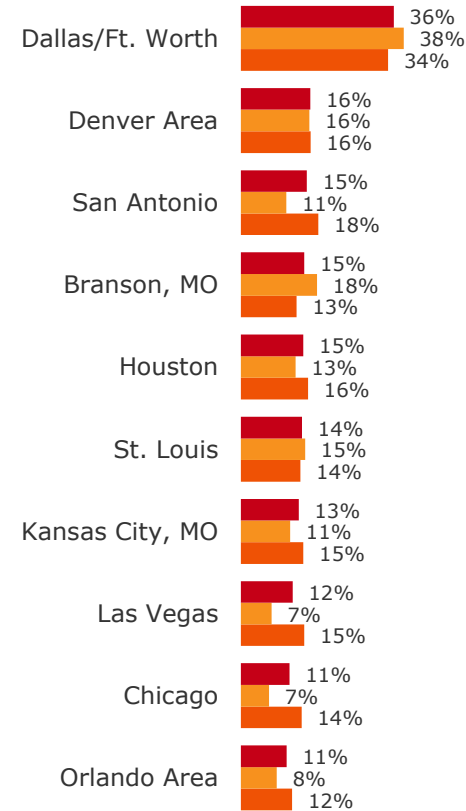
Top States

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.

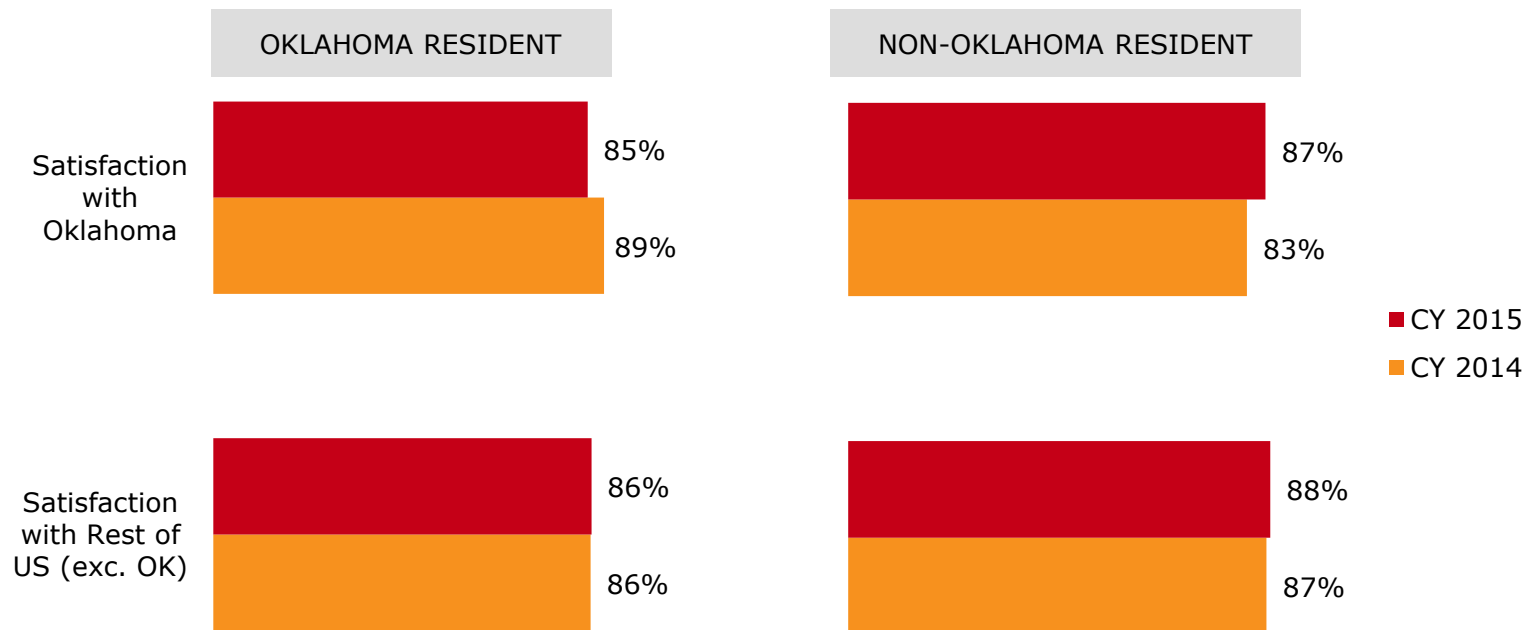
9

Satisfaction



OK visitors usually go home satisfied, regardless of residence, very similar to US destinations overall

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

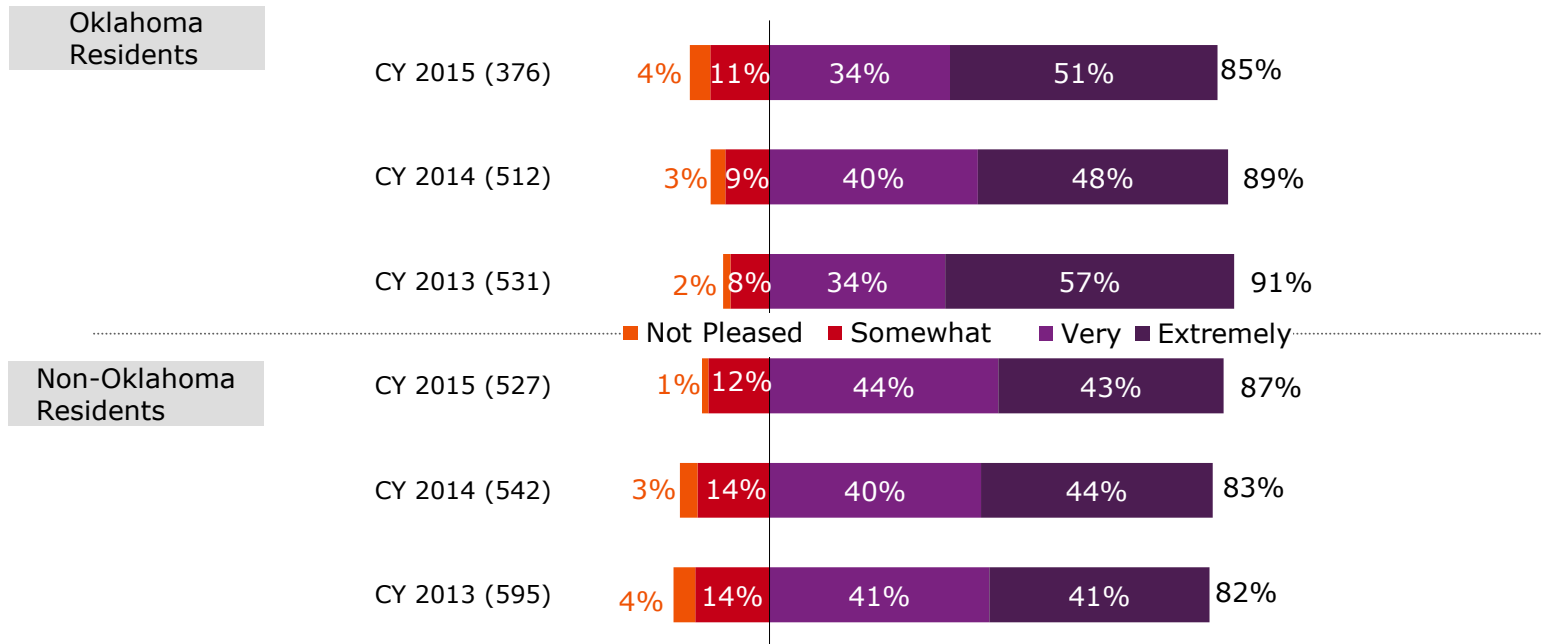


Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level - demo wtd.)

Overall satisfaction with Oklahoma remains similar to the prior year

- The gain in non-resident satisfaction offsets the slip among residents
- Although the resident total slips, the topmost rating (extremely satisfied) climbs.

Satisfaction with Oklahoma Visit
By Group (Base)



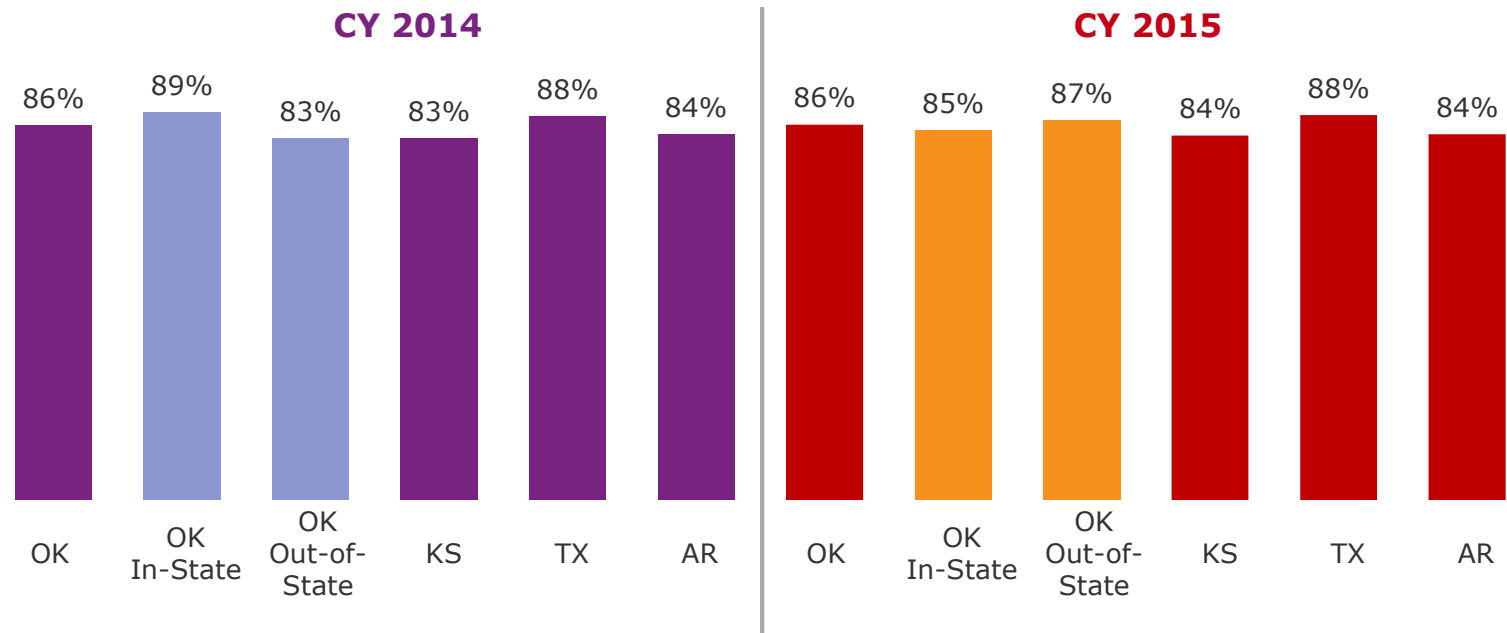
*Note: Not pleased includes *Not At All* and *Not Very Pleased*

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

Oklahoma satisfies 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.)

10

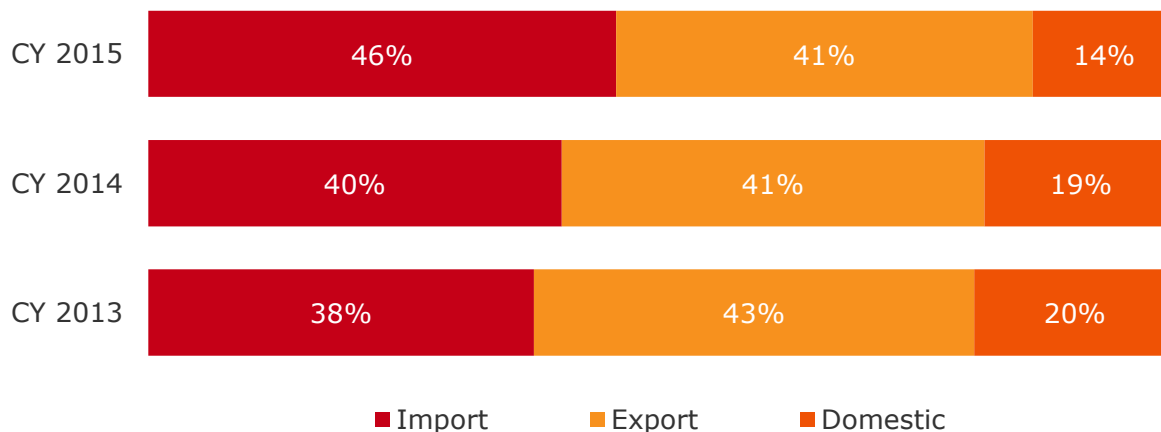
Export/Import



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.

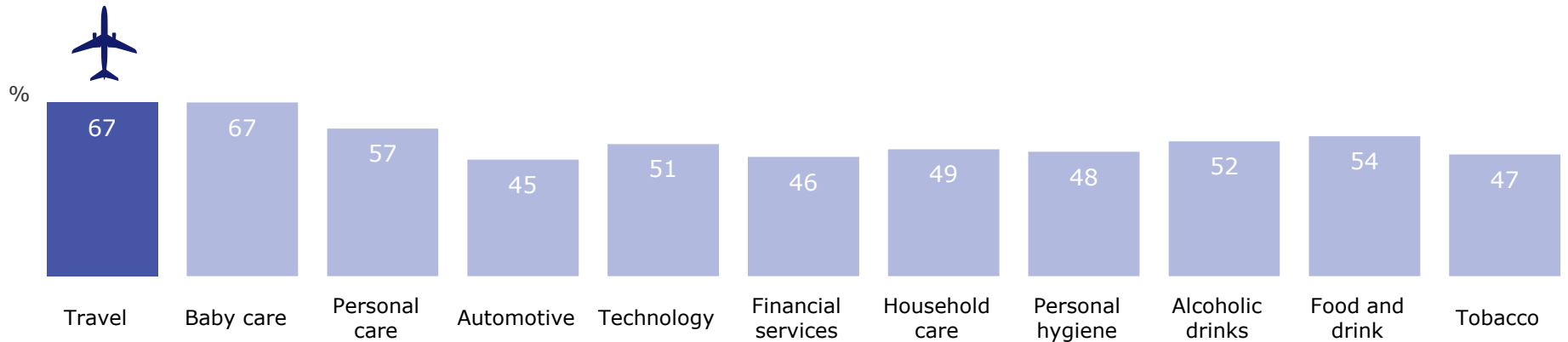
11

Connected Life



Travel and baby care lead in engaging consumers

Willingness of category users to engage with brands



Source: TNS Connected Life

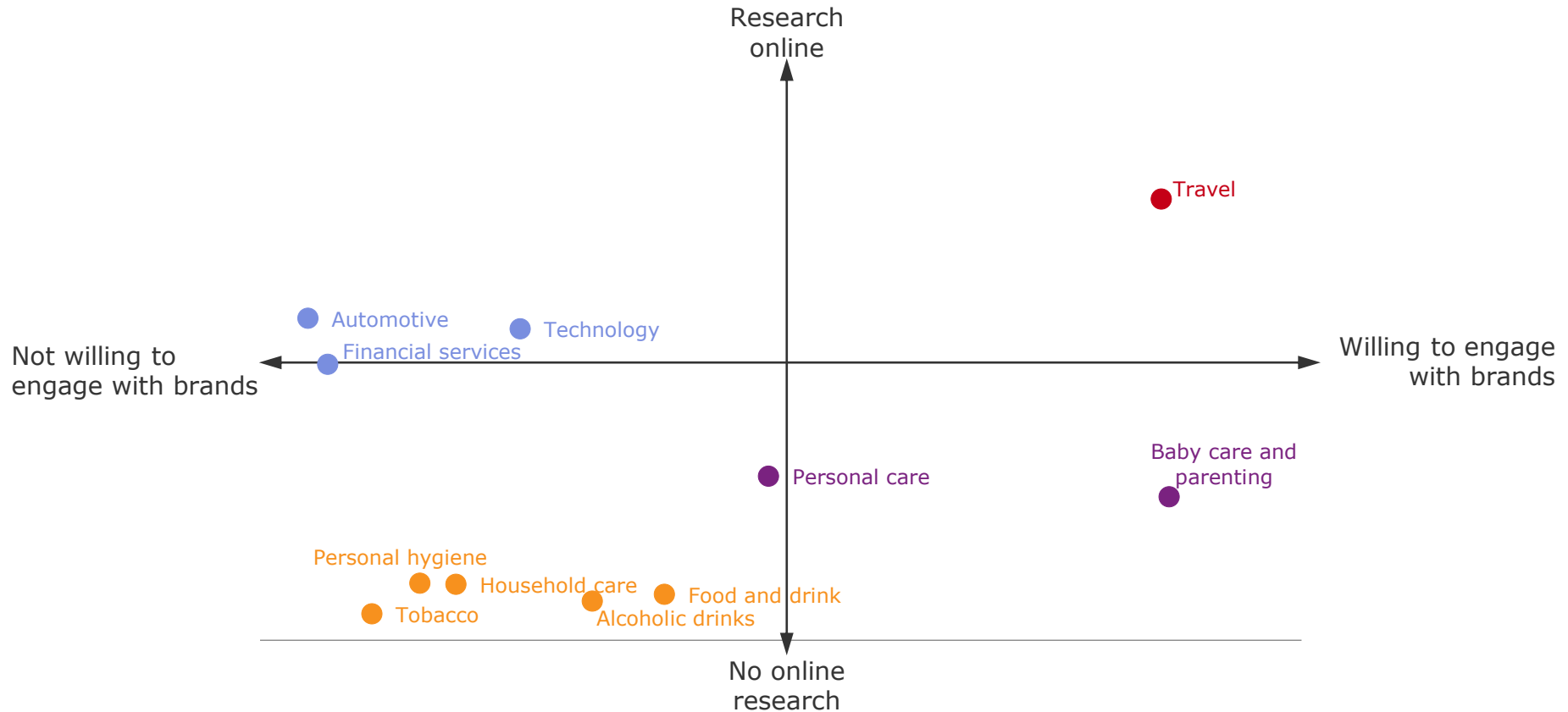


Calendar Year 2015 – Oklahoma
TravelsAmerica Visitor Profile Report

© TNS 2016



Consumers generally use online to research more expensive categories



Source: TNS Connected Life

Categories of digital influence and social engagement

Observers

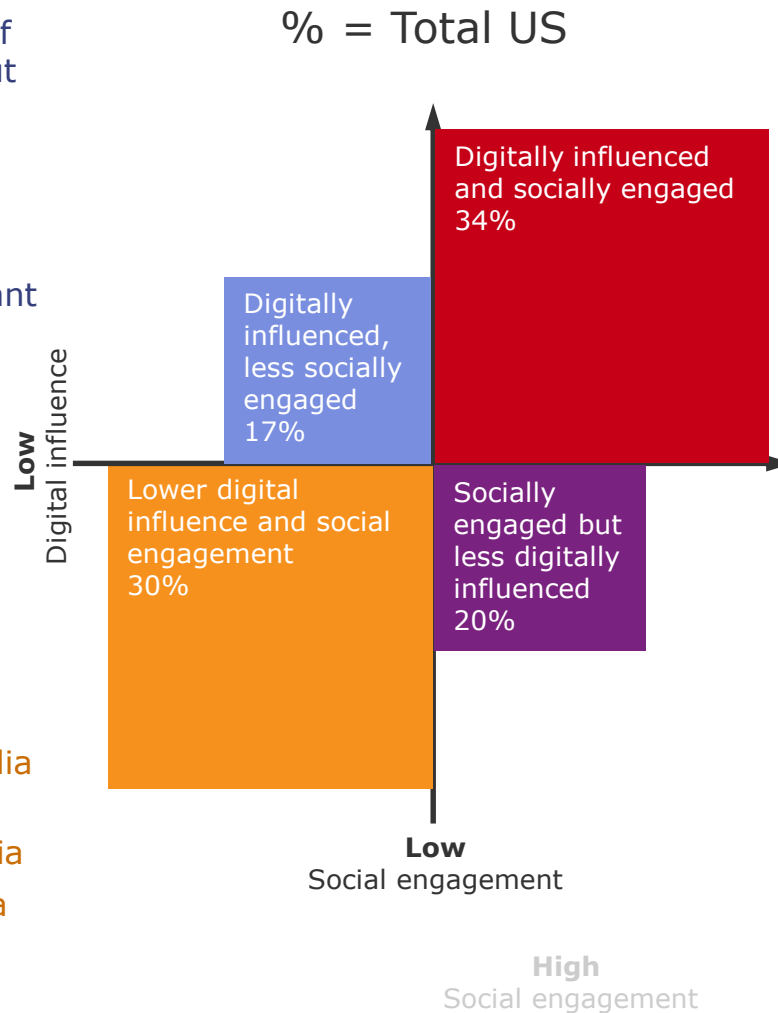
The internet = huge source of information for this group, but show little interest in social media

- Heavily engaged in digital media & technology
- Social media = less important
- Use digital all day

Functionals

With either poor access or little interest in digital technology, this group is still influenced far more by the world outside than the internet, particularly offline media

- Less engaged in digital media and technology
- Less engaged in social media
- Use lots of traditional media
- Digital less prevalent in decision path



Leaders

Quickly adopt new technologies; heavily influenced by and on digital and social channels

- Highly engaged with both digital & social media; constantly connected
- Vocal in social media
- Hard to reach traditionally
- Greatly influenced by digital & social in decision path

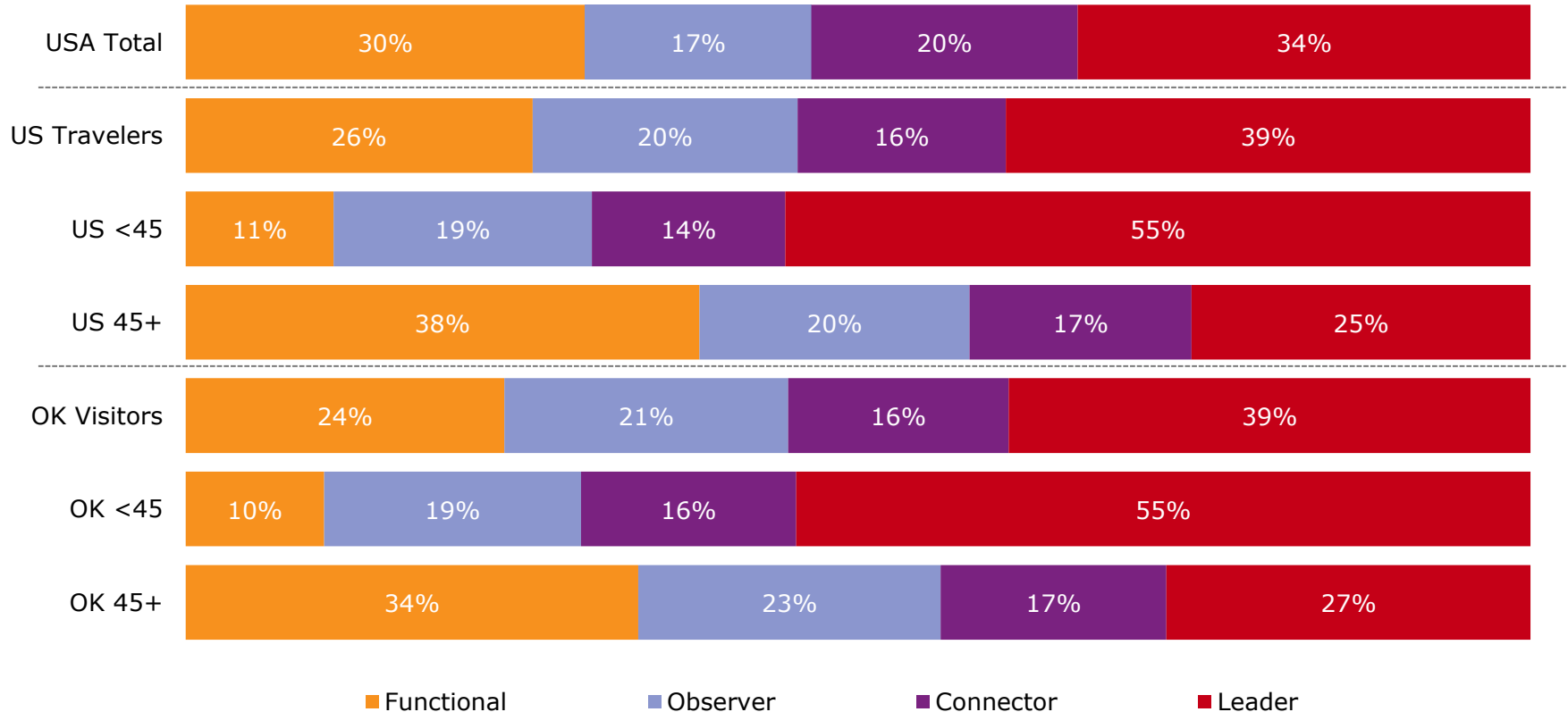
Connectors

Often new to the internet and keen to do more; always choose social media when prioritizing how to spend limited online time

- Highly engaged in social media
- Consume social media (rather than an influencer)
- Less engaged in digital outside of social media

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



12

Demographics



Oklahoma visitors resemble Overall US travelers, expect for just slightly 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 2014	All US Travelers 2015	Oklahoma Visitors Total 2014	Oklahoma Visitors Total 2015	Oklahoma In-State Visitors CY 2014	Oklahoma In-State Visitors CY 2015	Oklahoma Out-of-State Visitors CY 2014	Oklahoma Out-of-State Visitors CY 2015
Average Age	48	47	48	48	45	46	51	49
Average Household Income	76,400	74,900	69,700	72,000	62,000	61,000	75,200	78,300
% Male	29	32	32	31	28	26	34	35
% Married	57	59	59	63	59	56	60	66
Household Composition								
% One Person	23	17	22	18	19	20	25	17
% Two People	37	39	40	40	37	31	41	45
% Three or More	40	44	38	42	44	49	34	38
Ethnicity								
% Caucasian	87	84	88	88	86	85	90	89
% African-American	5	7	4	4	4	4	4	4

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

Demographics vary by trip purpose

- Oklahoma business travelers tend to be younger, more affluent, more likely married, and slightly more likely living in families (3+ in household)
- Overnights earn somewhat more and are slightly younger, but otherwise look like similar to day-trippers.

Demographics	Oklahoma Visitors Total 2015	Oklahoma Leisure Visitors	Oklahoma Business Visitors	Oklahoma Day-Trippers	Oklahoma Overnight (O/N) Visitors
Average Age	48	48	45	51	47
Average Household Income	\$72,000	\$71,000	\$102,300	\$64,400	\$75,800
% Male	31	31	39	35	30
% Married	63	63	69	64	62
Household Composition					
% One Person	18	18	15	19	18
% Two People	40	39	41	38	40
% Three or More	42	43	45	43	42
Ethnicity					
% Caucasian	88	88	89	89	87
% African-American	4	4	3	4	4

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



Visitors to Oklahoma and key competitors share similar demographic profiles

Exceptions:

- Texas visitors earn somewhat more; Arkansas visitors somewhat less
- Texas relies most heavily on in-state travelers and has greater ethnic variety.

Demographics	Oklahoma Visitors CY 2015	Kansas Visitors CY 2015	Texas Visitors CY 2015	Arkansas Visitors CY 2015
Average Age	48	47	45	48
Average Household Income	\$72,000	\$71,900	\$77,700	\$68,100
% Male	31%	33%	33%	32%
% Married	63	65	62	67
% In-State Visitor	36	41	69	40
Household Composition				
% One Person	18	13	15	14
% Two People	40	44	40	41
% Three or More	42	43	46	45
Ethnicity				
% Caucasian	88	91	83	87
% African-American	4	3	8	7
% Spanish Origin	3	5	11	7
Total Households (Census)	1,450,117	1,112,335	9,013,582	1,132,488

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

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



13

Background and Research Methods



Introduction and purposes of the research

BRAND	<ul style="list-style-type: none">■ Oklahoma Tourism & Recreation Department 
STUDY HISTORY AND DESIGN	<ul style="list-style-type: none">■ The second TravelsAmerica report for Oklahoma Tourism & Recreation Department■ Online data collection conducted continuously throughout the year by TNS as a nationwide syndication.
STUDY OBJECTIVES – ASSESSMENT OF THESE TOPICS:	<ul style="list-style-type: none">■ Proportion of Visitors to the State of Oklahoma: Overnight, Day, Business, Leisure, Residents, Non-Residents■ Profile of Visitors to Oklahoma:<ul style="list-style-type: none">■ Source of Visitors: state and DMA of visitor residence■ Basic Demographics: age, children in household, income■ Trip Characteristics: day vs. overnight, business, spending, length of stay, activities selected■ Mode of Transportation: air, own auto/truck, rental car, other■ Export/Import “Balance of Trade” Assessment: spending by Oklahoma residents traveling elsewhere vs. non-Oklahoma residents visiting Oklahoma; also includes domestic spending by visitors living in Oklahoma■ Competitors: Kansas, Texas, Arkansas snapshot comparisons■ Connected Life: Digital/social engagement of Oklahoma visitors

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 2015.

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, hike/backpack, 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, 2015

CY 2014 Travelers (Unweighted Respondents)	CY 2015 Travelers (Unweighted Respondents)	CY 2014 Travelers (Weighted by Demographics)	CY 2015 Travelers (Weighted by Demographics)	Region
1,490	1,332	1,490	1,290	Oklahoma Residents
1,034	971	1,108	929	Oklahoma Visitors (Trips)
62,724	61,552	64,502	59,673	Total for TravelsAmerica



Thank you



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