



# 2018 Oklahoma TravelTrakAmerica Visitor Profile Report & Insights

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## What's New with TravelTrakAmerica

**All team members are former DMO researchers, with 30+ years combined experience**

**Sending insights on U.S. travelers and the travel industry sent on a monthly basis**

**Tracking travel sentiment on a continuous basis**

**Uncovering travel motivations from an emotive perspective**

**Initiating a data concierge service**

**Explore questions to TTA so that specific clients can understand in real-time**

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# 1 Growth Summary



## Growth summary

### Growth insights

- In-state visits continue to account for the largest portion of total visits, with nearly half of person-trips in Oklahoma made by the state's own residents (46%).
- The top source of Oklahoma's out-of-state visitors continues to be the neighboring states of Texas (25%), Arkansas (5%), Kansas (5%), and Missouri (3%).
- Entertainment/amusement (particularly casinos/gaming) visitors and sightseeing visitors are the most lucrative travelers due to their high share of visitors and above average spending.
- Oklahoma's biggest spenders are travelers interested in adventure sports and activities involving adult beverages; however, they account for the smallest percentage of visitors and therefore, represent a smaller portion of total spending.
- Although those who are visiting family/friends account for a significant share of travelers to the state, their lower spending makes them less lucrative in driving the industry.
- Oklahoma's online presence is essential for reaching potential visitors, particularly the leisure segments, with a growing share relying on online sources for planning their trip.

### Precise plans for growth

- Maintain efforts targeting both in-state and out-of-state visitors. After experiencing a decline in 2017, this year saw a recovery in both segments, resulting in a boost to overall visitor numbers.
- As advertising budgets allow, enhance communication efforts to potential out-of-state visitors in large cities, most notably Dallas-Fort Worth, Texas, but also other cities in surrounding states within driving distance.
- Step up the promotion of activities that attract younger visitors and higher spenders, particularly the adventure sports and brewery/distillery/wine options available in the state, since these travelers are the most lucrative in terms of spending power.
- Encourage residents and those visiting family/friends in the state to act as ambassadors for Oklahoma, especially on social media, to encourage other potential visitors to see all the experiences Oklahoma offers for themselves.
- Although ensuring visitors are satisfied with their travels can be difficult at the state level, some action may be needed if Oklahoma's satisfaction among visitors continues to slowly decline, as some competing states have pulled ahead.

# Report Overview

## History

### Oklahoma Tourism & Recreation (OTRD):

- Produce quarterly and annual Oklahoma visitation
- 5<sup>th</sup> report generated for OTRD
- Continuous online data collection via TravelTrak America

## Profile

### Visitor Characteristics:

- Source markets: State, DMA
- Demographics: age, children, employment, income, etc.

### Trip Characteristics:

- Trip type: overnight, day, leisure, business
- Length of stay
- Activities
- Transportation
- Spending within state

## Benefits

### Competitive Analysis:

- Comparison of Oklahoma visitors to neighboring states of Arkansas, Kansas, Texas, and Missouri on intent to visit, visitation, satisfaction, length of stay, spending, etc.

### Visitor Segments:

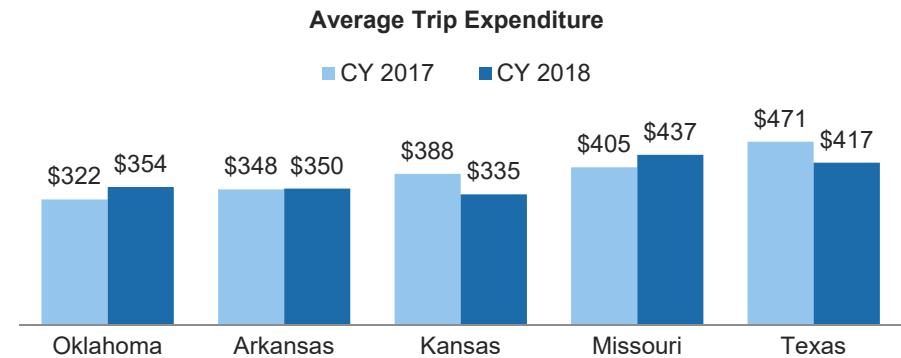
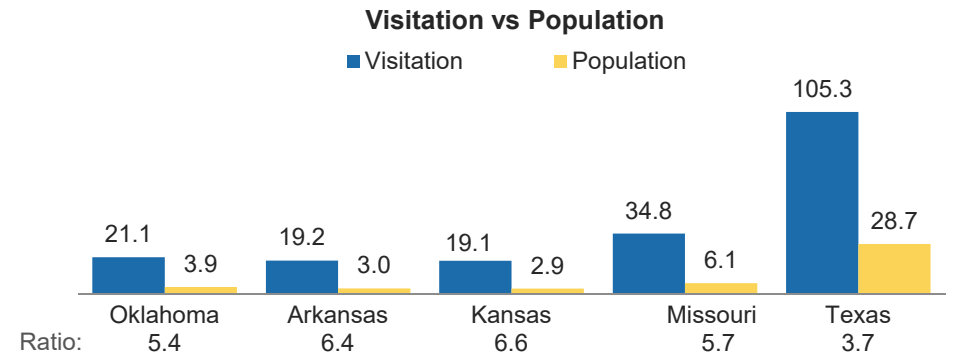
- Understand visitor segments generating the highest yield within the state, where they come from, and their reasons for visiting.

## 2 Executive Summary



## Tourism remains an important revenue stream

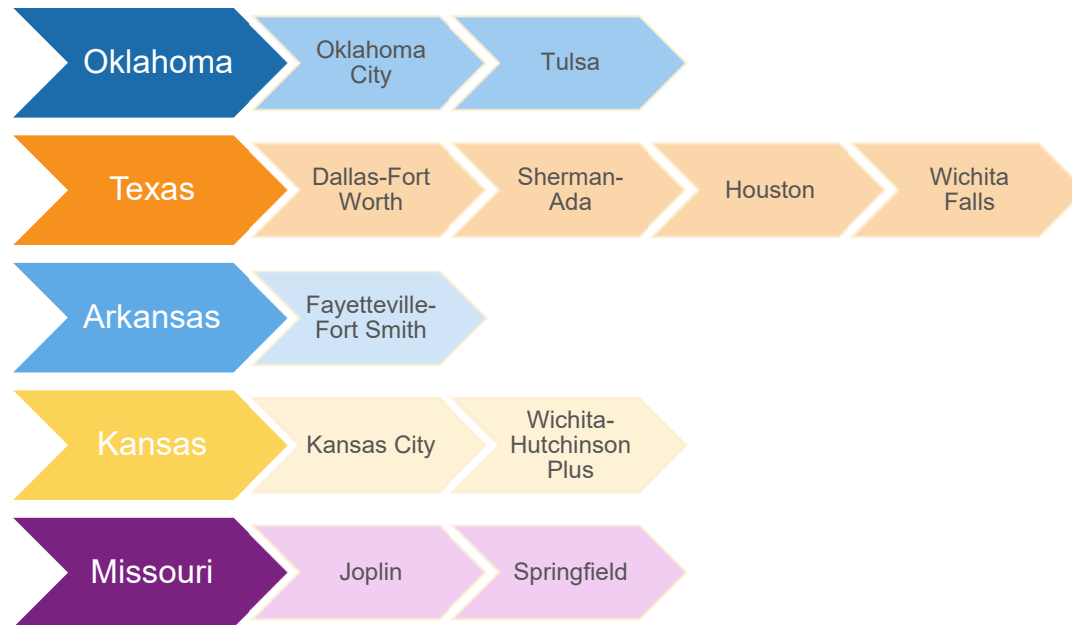
- Tourism generates revenue for businesses and in turn, tax revenue (sales/lodging/etc.).
- The ratio of visitation per population helps illustrate the relevance of tourism to Oklahoma. With a ratio of 5.4 visitors per resident, Oklahoma finds itself in the middle of its competitive set, above Texas but slightly below Missouri.
- After several years of reduced visitor spending within the state, Oklahoma's visitor spending per trip experienced nearly a 10 percent boost, reaching \$354.
- At the same time Oklahoma was benefiting from greater average trip spend, other regional states experienced the opposite, with a drop in average trip spend observed for both Kansas and Texas. Among the remaining border states, Missouri experienced a boost in average spend on par with Oklahoma, while Arkansas saw only a minor gain.



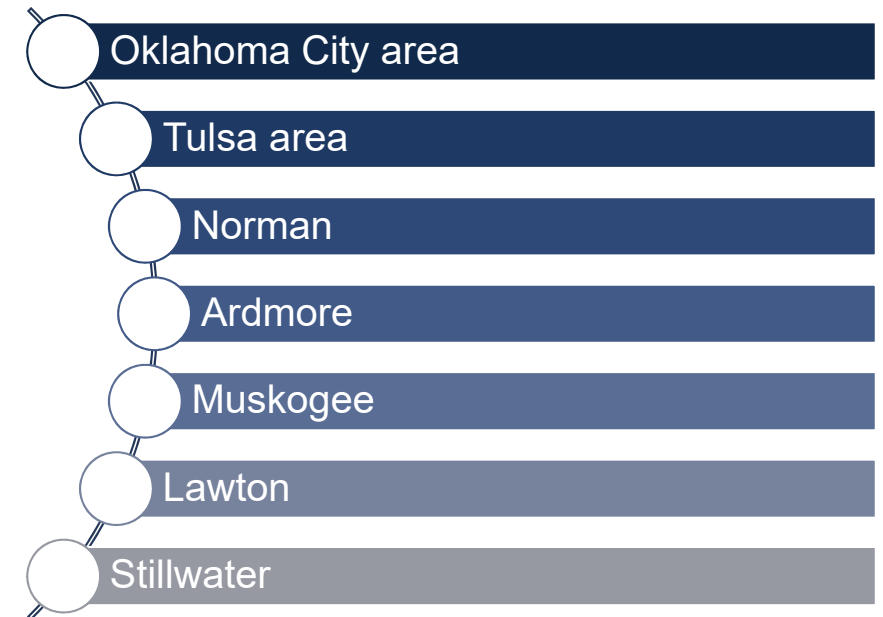
## Visitor profile insights: From where they come and where they go

- A destination's top source markets are often border states. Oklahoma, however, draws most of its visitors from within the state itself, in addition to Texas, Arkansas, Kansas, and Missouri.
- As one would expect, Oklahoma visitors are drawn to the state's largest cities.

### Oklahoma Visitors Come From....

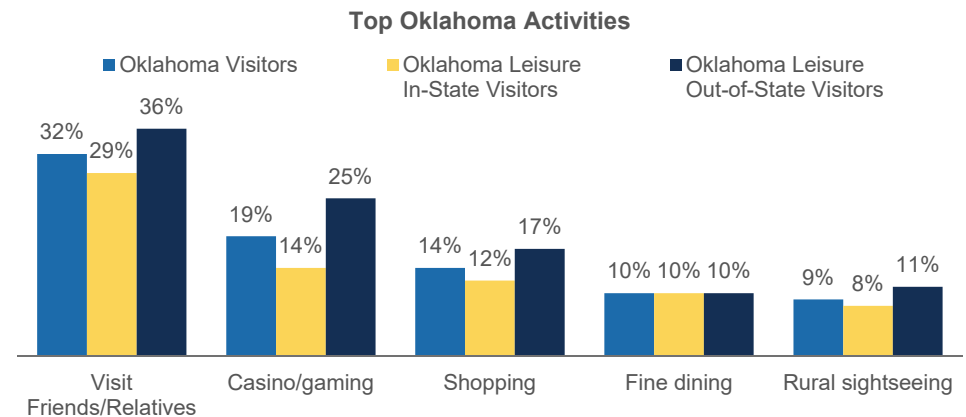
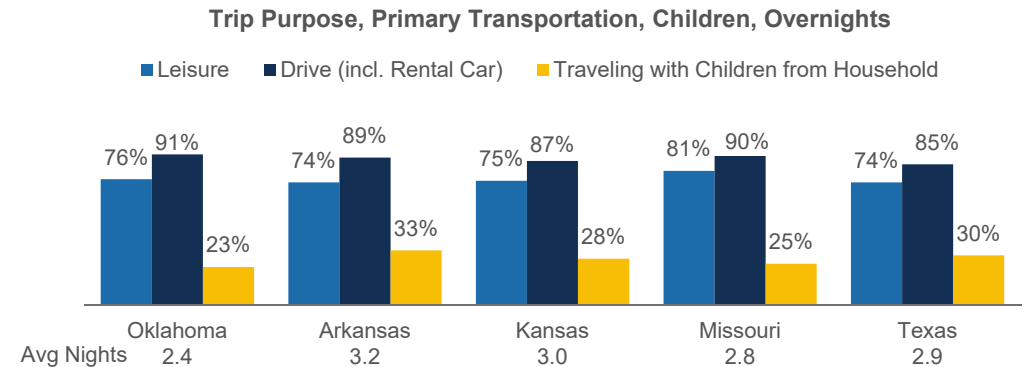


### Oklahoma Visitors Travel To....



## Visitor profile insights: How they get to Oklahoma and what they do

- Oklahoma visitors are similar to those that travel to neighboring states; most are drive visitors and roughly three quarters are leisure travelers. The percentage of Oklahoma visitors who are traveling with children from their household is smaller compared to neighboring states and overnight visitors stay for shorter time.
- Casino/gaming activity participation, as a percentage of total respondent participation, fell year-over-year. However, the actual number of respondents who participated in this activity increased year-over-year.
- Most in-state and out-of-state leisure visitors to Oklahoma traveled to visit friends or relatives. Casino/gaming was the second most reported activity among both in-state and out-of-state leisure visitors, but those from out-of-state are much more likely to take advantage of Oklahoma's gaming opportunities.



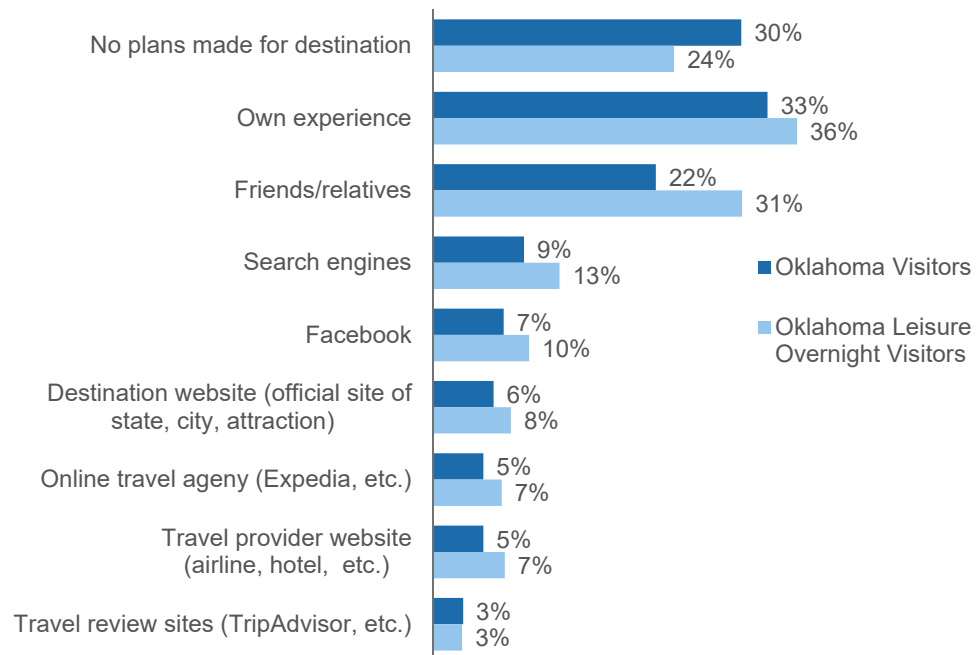
## Visitor spending profiles: Average spending by niche category of activities

- Although Oklahoma visitors that participate in activities revolving around family and friends represents the largest share of visitors to the state, this segment has the lowest average trip spend within the state at \$300, making them a much less lucrative target.
- Oklahoma's biggest spenders tend to be travelers who are interested in adventure sports and activities and breweries/distilleries/wineries; however, these travelers account for the smallest percentage of Oklahoma's visitors and therefore, represent a smaller portion of total spending.
- Entertainment and amusement activities (particularly casinos/gaming) and sightseeing represent the largest share of participants with moderately high spending, making them an attractive segment to target.

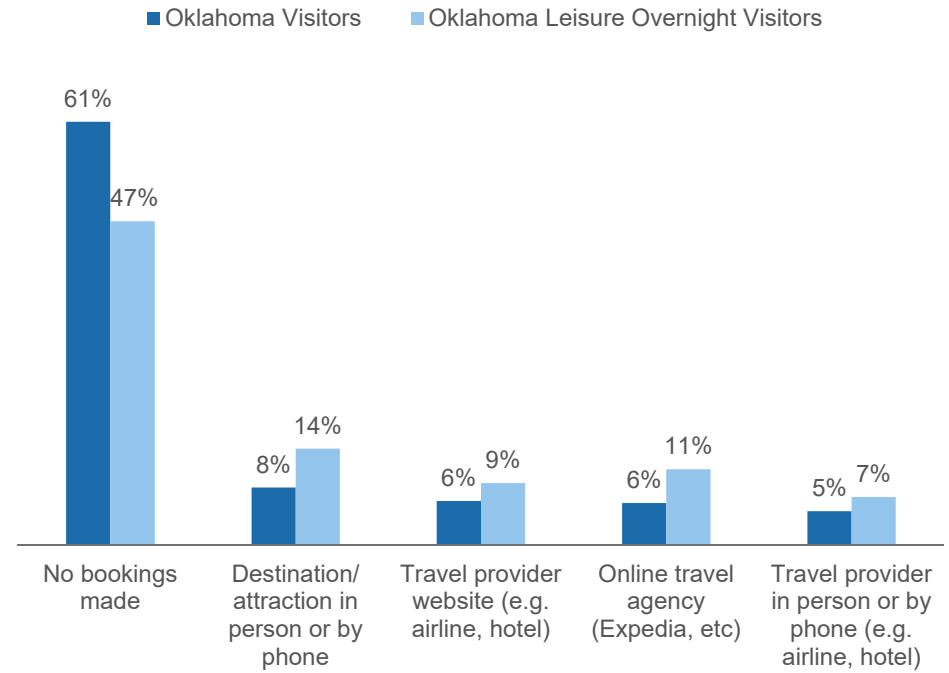
% Active in Category Type		Average Trip Spend in Oklahoma	Average Age of Oklahoma Visitor
Family/Friend Activities/Reunions	35%	\$300	47.3
Sightseeing	26%	\$657	49.7
Entertainment/Amusement	25%	\$614	52.5
Sports & Recreation	16%	\$595	45.1
Art & Culture	14%	\$574	44.2
Nature/Outdoor Activities	14%	\$522	41.8
Festivals/Rodeo/State Fair/Theme Parks/Zoos	7%	\$720	44.3
State/National Parks/Rec Areas/Monuments	6%	\$438	40.4
Adventure Sports*	3%	\$1,005	41.6
Breweries/Distilleries/Wineries*	2%	\$909	40.7

**Oklahoma visitors most commonly use their own experience or friends/relatives to plan their trip. For booking, most leisure overnight visitors booked with the destination or attraction (in person or by phone) and used an OTA.**

**Top Trip Planning Sources**



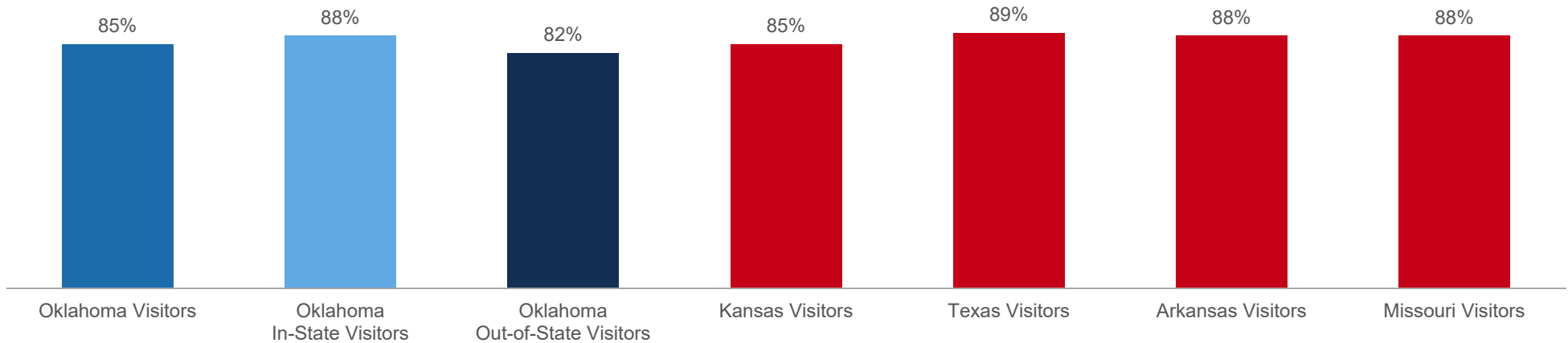
**Top Trip Booking Methods**



## Oklahoma sends visitors home happy

- More than eight in ten Oklahoma visitors were satisfied with their Oklahoma visit. In-state residents — who have greater familiarity with the state — reported stronger satisfaction than non-residents. Among the competitive set, Texas ranks highest for satisfaction.

Satisfaction: Extremely/Very Satisfied with Visit to State (CY 2018)



**3**  
**Appendix:**  
**Detailed Results**



**4**  
**Share of Visitors**



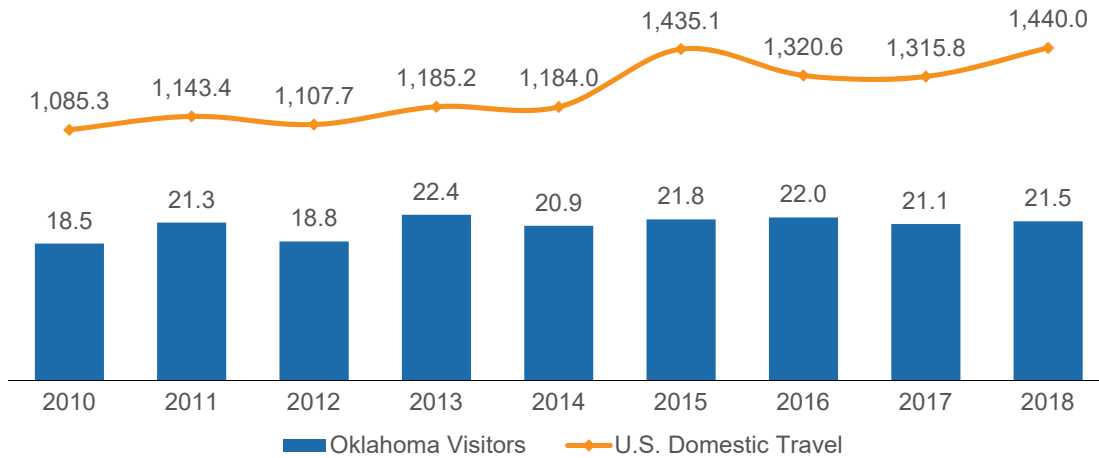
# Oklahoma welcomed approximately 21.5 million visitors in 2018

## Market Overview:

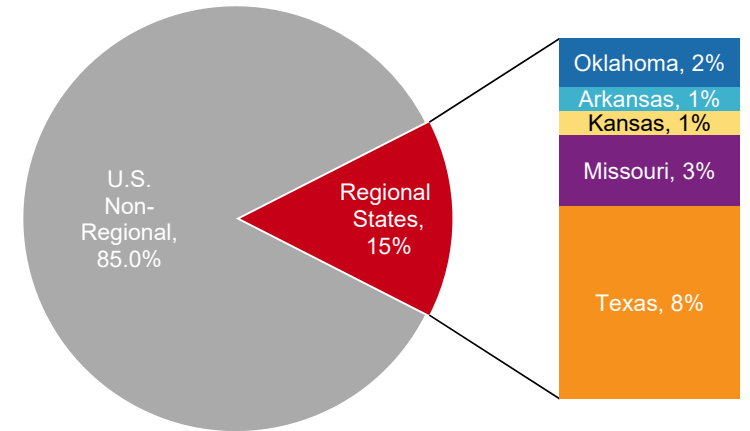
- Oklahoma visitation reached 21.5 million in 2018, up 2% from the previous year.
- Oklahoma visitation accounts for around two percent of total U.S. domestic travel.
- The ratio of Oklahoma's visitation to its population, remained on par with the previous year at approximately 5.45 visitors per resident.

Oklahoma Population 2018 Census estimate	Oklahoma Visitors CY 2018
3,943,079	21,494,000

**Domestic Travel Trends within the U.S. and Oklahoma**  
(person-trips, in thousands)



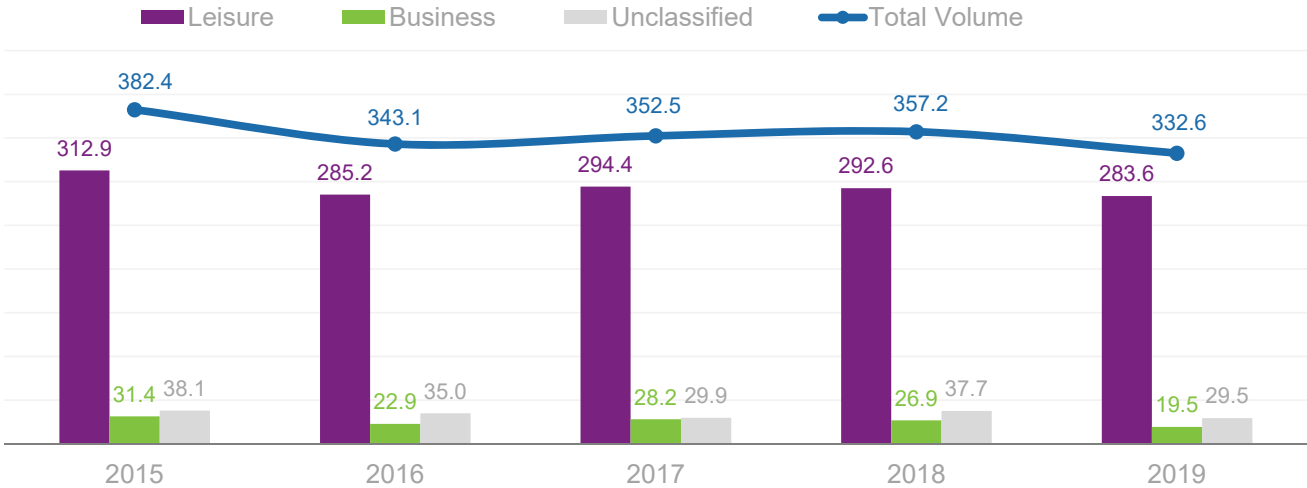
**Regional States & Non-Regional Share of U.S. Domestic Travel**



# Nationally, travel volume, particularly business travel, slips from prior Q2 results

- Leisure travel dips slightly below recent years
- Business travel drops more strikingly and, except for the harbinger of 2016, follows a steady downward trend
- Note: despite the current quarter softening, leisure travel for FY 2019 (July – June) climbs 6 percent from FY 2018

**U.S. Travel Volume (Person-Trips) Q2: 2015 – 2019**  
(000,000)



	% Change 2019 vs. 2018	% Change 2019 vs. 2017
Total	-6.9%	-5.7%
Leisure	-3.1%	-3.7%
Business	-27.4%	-31.0%

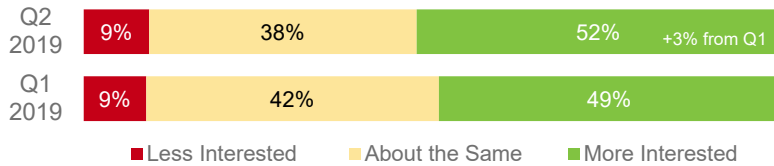
Green = improvement; Red = drop

Fiscal Year Person Trips:		
FY 2019	1,406,396K	Total
FY 2018	1,357,013K	Total
FY 2019	1,186,153K	Leisure
FY 2019	1,124,108K	Leisure

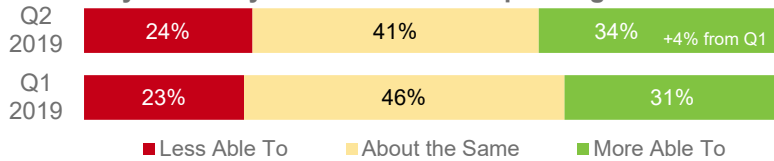
Travel Volume – Q4a and Q1b. (Trip Level, Projected Q4a/d Weight)

**Travel Confidence: As of the second quarter, Travel Confidence measures show that half (52%) of travelers are more interested in traveling than they were a year ago - a level slightly (+3 points) higher than 2019 Q1. All Travel Confidence measures have strengthened since the first quarter, suggesting a stable marketing environment in the coming months.**

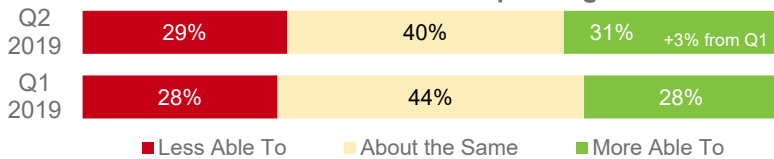
**How has your interest in taking a leisure trip changed?**



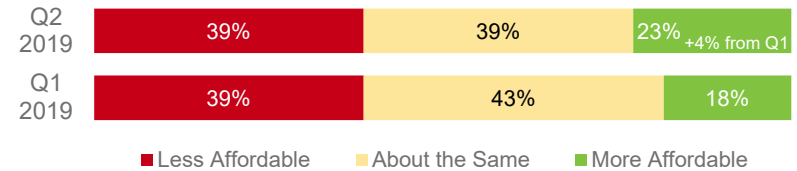
**Thinking about the different demands on your time, how has your ability to take a leisure trip changed?**



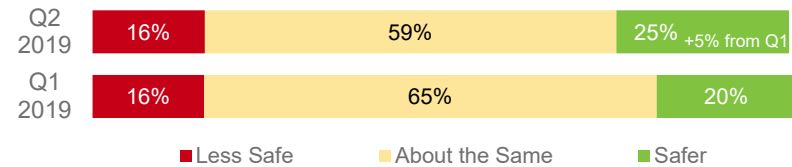
**Given your personal finances, how has your ability to take a leisure or leisure/business trip changed?**



**Thinking about how much you have to spend for airfare, accommodations, ground transportation, shopping entertainment, etc., is the cost of leisure travel now ...**



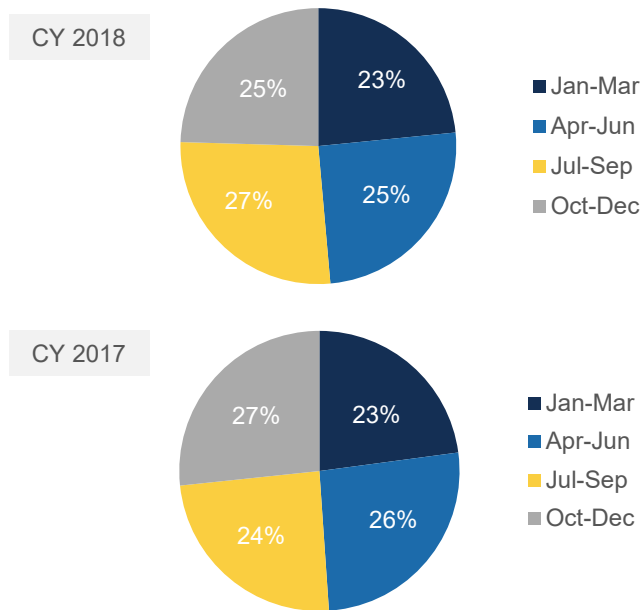
**Would you say that, for people like you, travel is ...**



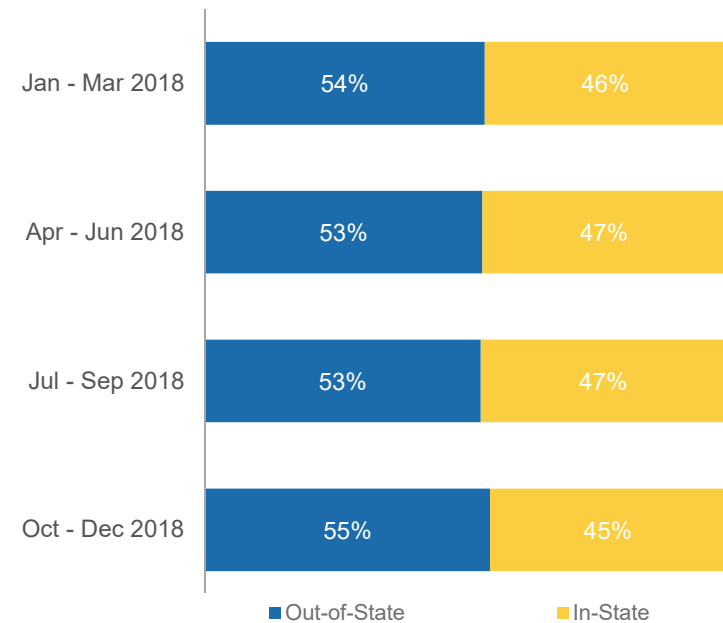
Q38. Current feelings/situation regarding a trip compared to a year ago (Interview Level; Demo Weight)

Oklahoma's share of quarterly visitation shifted in 2018, with visitation during July-September overtaking October-December in terms of person-trips. At the same time, Oklahoma's share of in-state and out-of-state visitation remained relatively stable during each quarter.

Oklahoma Visitation by Quarter  
(in person-trips)



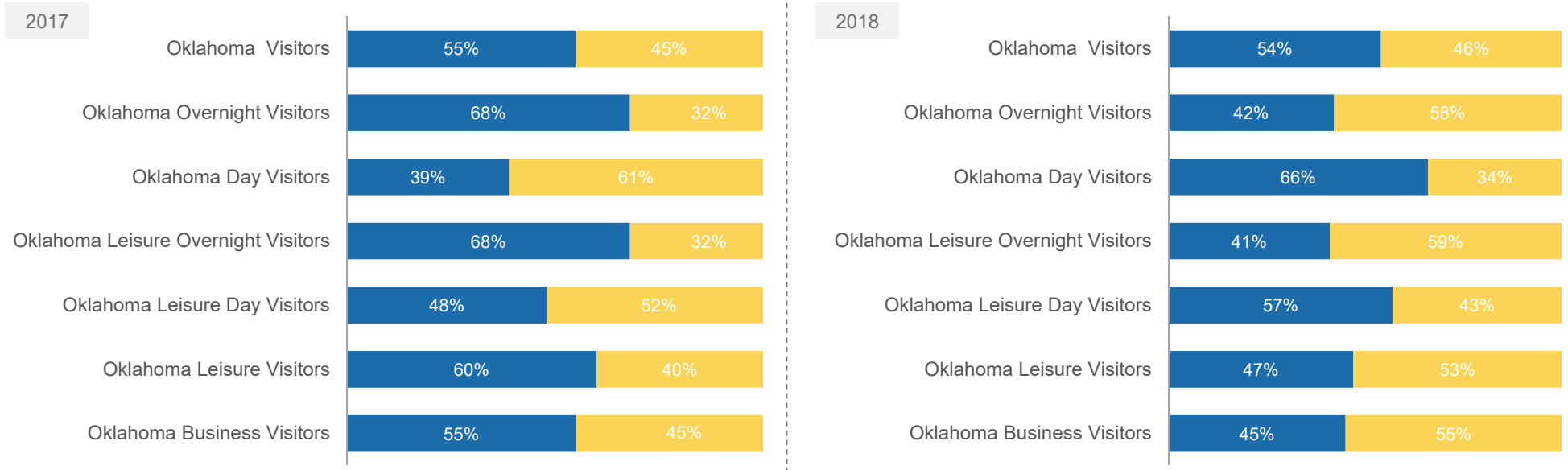
Oklahoma Visitor Source by Quarter  
(in person-trips)



# Oklahoma's share of in-state and out-of-state visits during 2018 remained relatively consistent with the previous year.

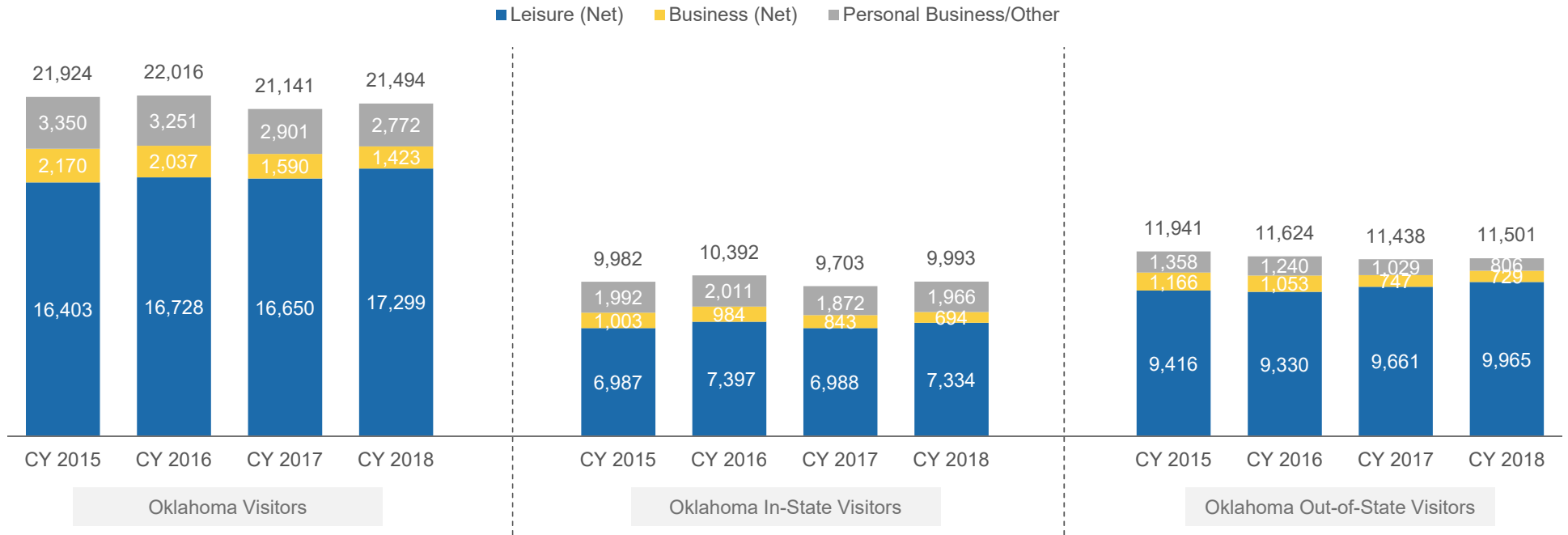
**Visitor Segments Travel In-State vs Out-of-State**  
(in person-trips)

■ Out-of-State ■ In-State



**Oklahoma visitation benefited from an increase in both in-state and out-of-state visitors, driven by a 4% increase in overall leisure visitors.**

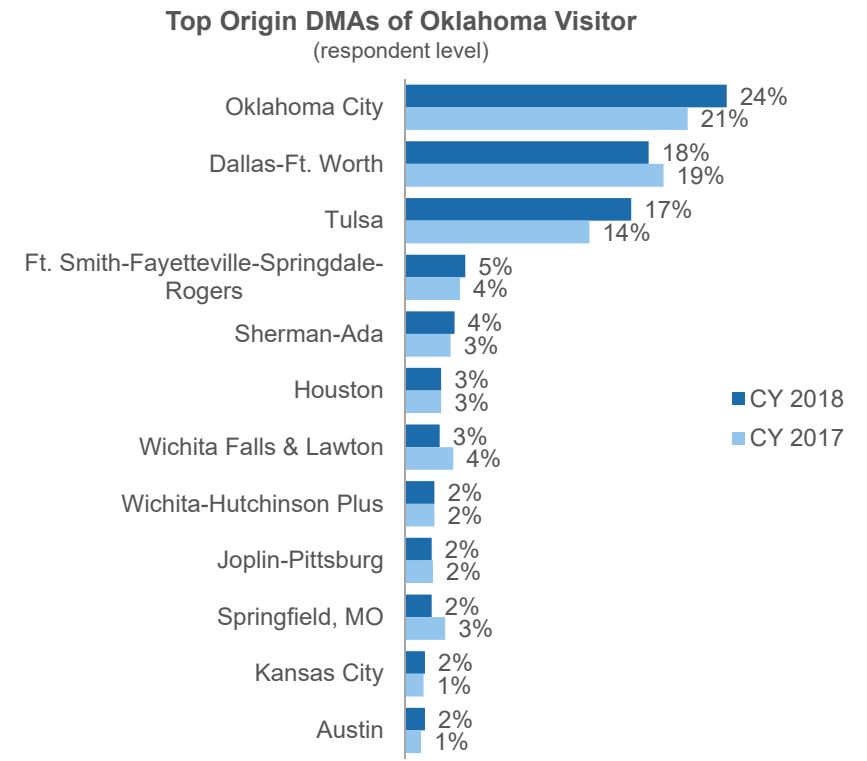
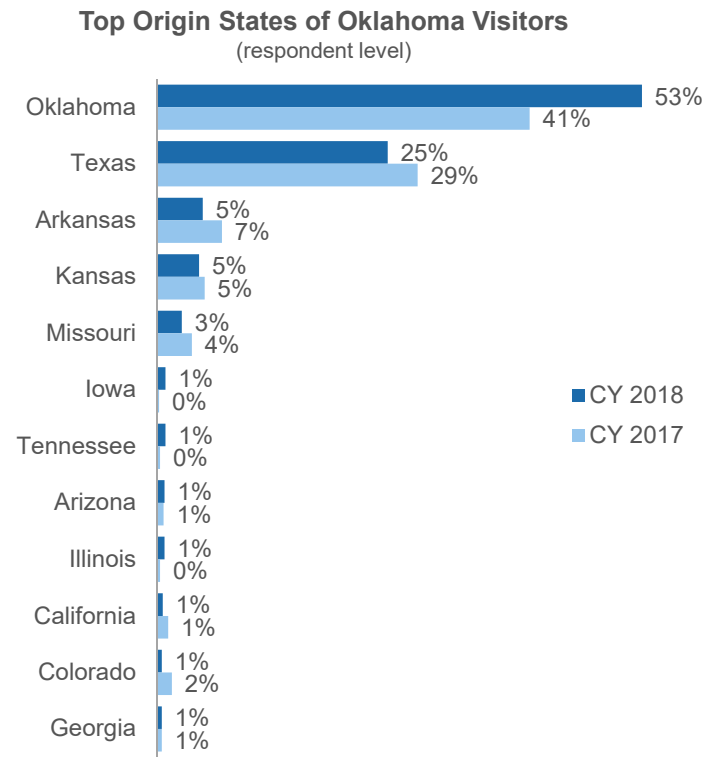
**Trends in Oklahoma Visitation by Primary Purpose of Trip**  
(in person-trips; in thousands)



## 5 Source Markets & Type of Trips



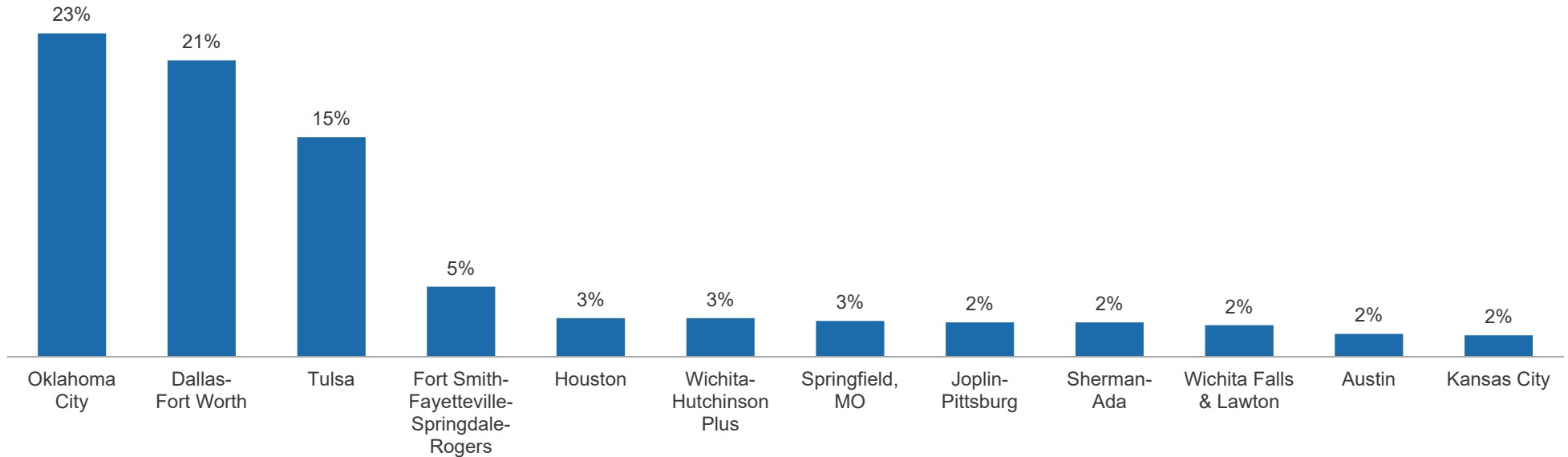
# Neighboring Texas and its respective cities continue to dominate Oklahoma's out-of-state visitor source markets



## Top Origin DMAs for Oklahoma Visitors whose Primary Purpose of Visit was Leisure

- As with overall Oklahoma visitors, travelers visiting the state primarily for leisure mostly reside in the DMAs of Oklahoma City, Dallas-Fort Worth, and Tulsa.

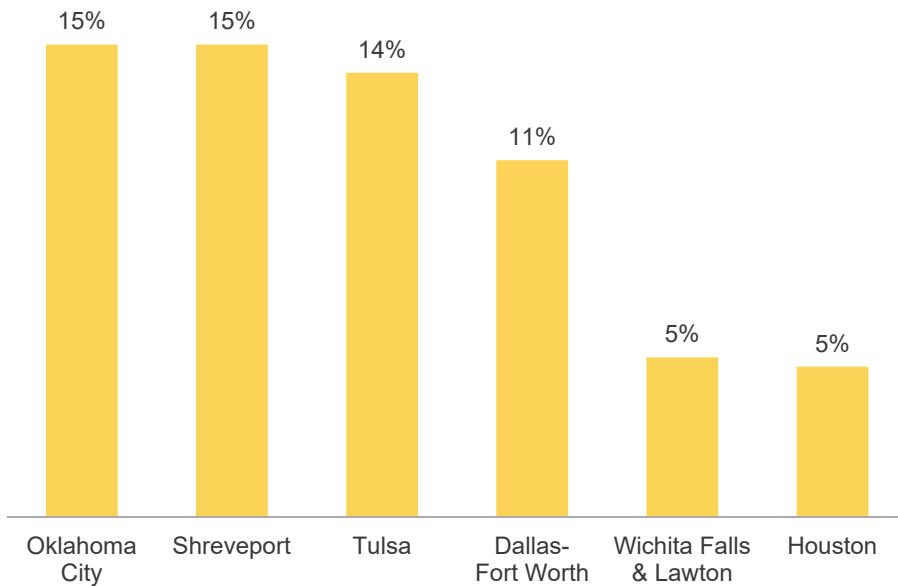
Top Origin Markets of Oklahoma Visitors who's Primary Purpose of Visiting was Leisure



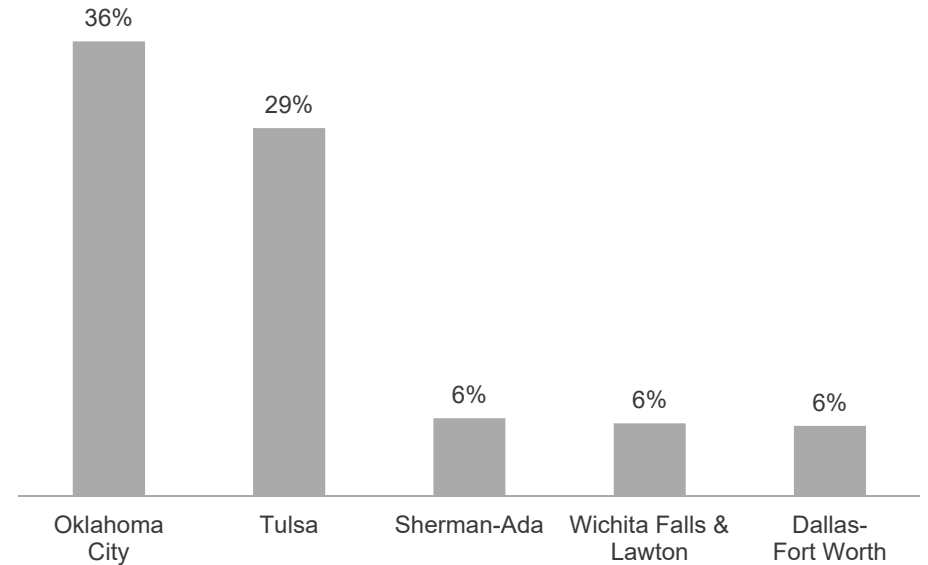
## Top Origin DMAs for Oklahoma Visitors whose Primary Purpose of Visit was Business

- Visitors to Oklahoma who were traveling primarily for professional business mostly originated in Oklahoma City, Shreveport, and Tulsa, while those traveling primarily for personal business largely came from Oklahoma City and Tulsa.

Top Origin Markets of Oklahoma Visitors whose Primary Purpose of Visiting was Professional Business



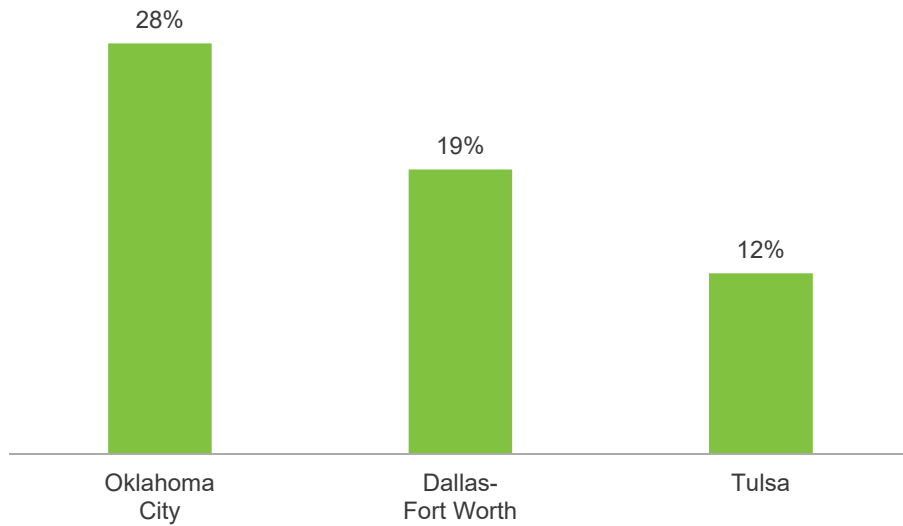
Top Origin Markets of Oklahoma Visitors whose Primary Purpose was Personal Business (e.g. medical travel, education, etc.)



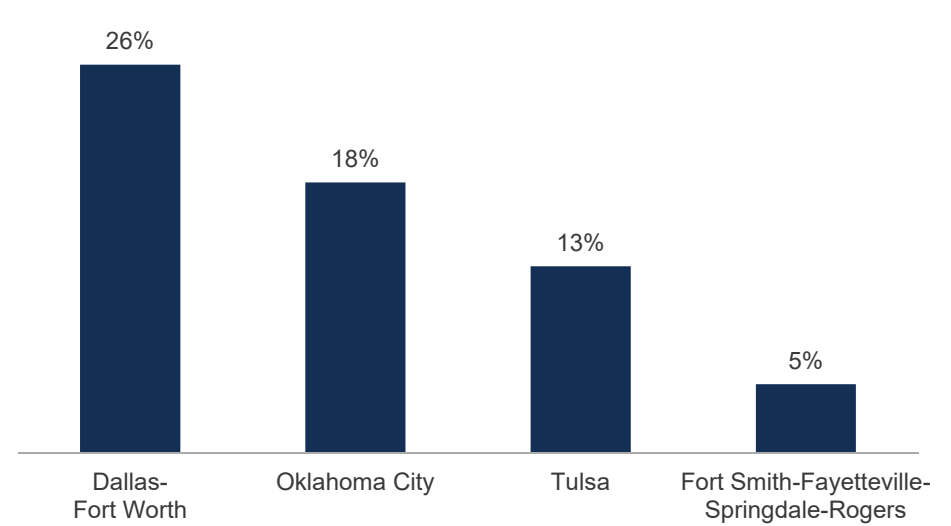
## Top Origin Markets of Oklahoma Visitors by All Purposes of Visit

- Among Oklahoma visitors who said one of their trip purpose was the outdoors and/or recreation, the top feeder markets were Oklahoma City, Dallas-Fort Worth and Tulsa.
- Of those indicating one of their trip purposes was entertainment and/or sightseeing, the feeder markets included Dallas-Fort Worth, Oklahoma City, and Tulsa.

**Top Origin Markets of Oklahoma Visitors whose Purpose of Visiting Included Outdoor/Recreation**  
(reflects all purposes)



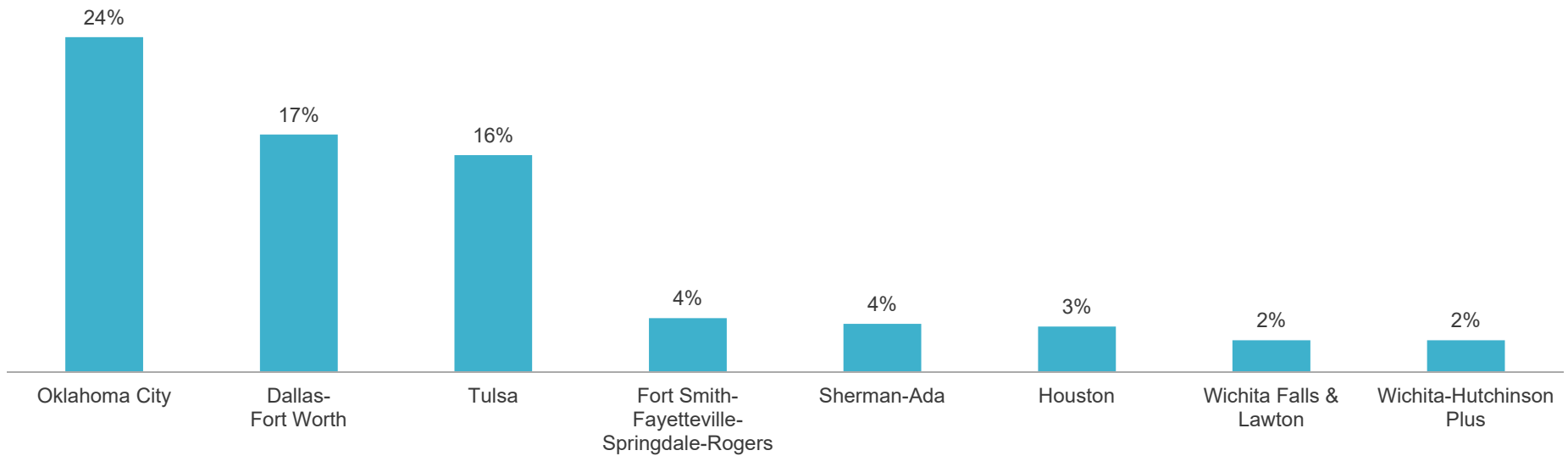
**Top Origin Markets of Oklahoma Visitors whose Purpose of Visiting Included Entertainment/Sightseeing**  
(reflects all purposes)



## Top Origin DMAs of Oklahoma Visitors by All Purposes of Visit

- When all purposes for visiting Oklahoma are considered, Oklahoma City was the top origin market for travelers visiting friends and family, followed by Dallas-Fort Worth and Tulsa.

**Top Origin Markets of Oklahoma Visitors whose Purpose for Visiting Included Visiting Friends/Relatives**  
(reflects all purposes)



6  
Planning & Booking



## Nationally, West South Central Visitors Tend to Stay Nearby

- In general, travelers stay close-to-home, taking most of their trips in the same census division where they live – consistent with the tendency to drive. However, two census divisions draw a relatively larger share of out-of-region visitors ... roughly half of visitors to the East South Central and Mountain regions live elsewhere.

### Visitor Source by Census Division

Census Divisions 2019 (Diagonal Shows Residence = Destination)

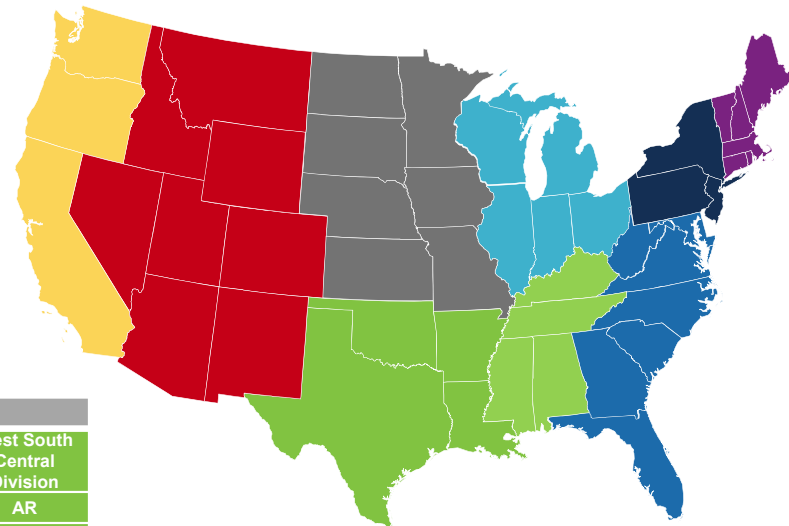
% From Origin	Destination									
	New England	Middle Atlantic	South Atlantic	East South Central	West South Central	East North Central	West North Central	Mountain	Pacific	International Destinations
New England	58	7	3	1	1	1	0	1	1	6
Middle Atlantic	19	61	10	5	3	5	2	5	4	20
South Atlantic	10	17	63	17	5	6	3	6	6	21
East South Central	1	2	6	46	3	3	1	2	1	3
West South Central	4	1	4	9	76	2	8	6	4	10
East North Central	2	5	7	13	4	71	17	5	4	9
West North Central	1	1	2	2	4	7	61	4	1	4
Mountain	2	2	2	2	2	2	5	52	7	6
Pacific	4	5	3	5	3	4	3	19	73	20

Note: Since some census divisions have more residents than others, the numbers will not sum to 100% horizontally. Every destination will likely draw a larger number of visitors from more populous divisions and fewer from smaller divisions.

Q38. States visited (Trip Level; Demo Weight)

## Census Geography (Region/Division/State) Composition

North Central Region		West Region	
East N. Central Division	West N. Central Division	Mountain Division	Pacific Division
IL	IA	AZ	CA
IN	KS	CO	OR
MI	MN	ID	WA
OH	MO	MT	
WI	NE	NV	
	ND	NM	
	SD	UT	
		WY	



Northeast Region		South Region		
New England Division	Mid Atlantic Division	South Atlantic Division	East South Central Division	West South Central Division
CT	NJ	DL	AL	AR
ME	NY	DC	KY	LA
MA	PA	FL	MS	OK
NH		GA	TN	TX
RI		MD		
VT		NC		
		SC		
		VA		
		WV		

## Oklahoma visitors decide to travel closer to their actual trip than overall U.S. travelers taking a domestic trip.

Trip Planning Time Frame by Travel Segment												
Trip Decision Timing	U.S. Domestic Travel		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors		Oklahoma Overnight Visitors		Oklahoma Day Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
Considered												
Less than 2 weeks before visit	32%	33%	43%	46%	47%	58%	39%	31%	32%	35%	60%	62%
2 – 4 weeks before visit	17%	17%	18%	19%	18%	17%	19%	21%	19%	22%	16%	14%
1 – 3 months before visit	20%	20%	17%	16%	18%	13%	16%	19%	20%	18%	11%	12%
3 – 6 months before visit	15%	14%	10%	10%	7%	5%	12%	15%	13%	13%	5%	4%
6+ months before visit	19%	17%	13%	11%	10%	7%	15%	15%	16%	12%	8%	8%
Decided												
Less than 2 weeks before visit	41%	40%	52%	54%	57%	66%	49%	41%	41%	43%	71%	71%
2 – 4 weeks before visit	18%	18%	17%	18%	19%	15%	16%	20%	20%	21%	13%	13%
1 – 3 months before visit	19%	20%	15%	14%	14%	10%	16%	18%	19%	18%	9%	8%
3 – 6 months before visit	12%	12%	7%	7%	4%	4%	9%	11%	10%	10%	3%	3%
6+ months before visit	13%	12%	9%	7%	7%	5%	10%	9%	11%	8%	5%	5%

**A greater portion of Oklahoma’s overnight visitors—both in-state and out-of-state—made their trip decision closer to their trip departure, compared to the previous year.**

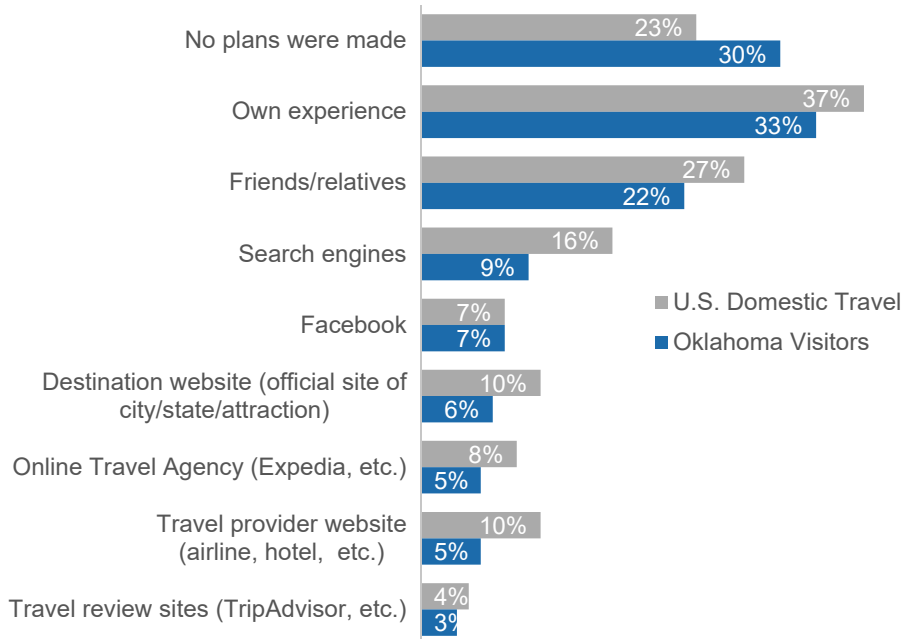
**Trip Planning Time Frame by Travel Segment**

Trip Decision Timing	Oklahoma Out-of-State Overnight Visitors		Oklahoma In-State Overnight Visitors		Oklahoma Leisure Out-of-State Overnight Visitors		Oklahoma Leisure In-State Overnight Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
<b>Considered</b>								
Less than 2 weeks before visit	32%	48%	32%	51%	31%	25%	32%	26%
2 – 4 weeks before visit	21%	22%	23%	22%	19%	22%	19%	22%
1 – 3 months before visit	23%	16%	20%	16%	19%	19%	17%	19%
3 – 6 months before visit	11%	7%	11%	5%	14%	17%	14%	19%
6+ months before visit	13%	7%	14%	7%	17%	16%	18%	15%
<b>Decided</b>								
Less than 2 weeks before visit	42%	57%	40%	59%	40%	33%	40%	34%
2 – 4 weeks before visit	26%	19%	28%	18%	17%	23%	18%	23%
1 – 3 months before visit	15%	14%	15%	14%	21%	21%	19%	20%
3 – 6 months before visit	6%	6%	6%	5%	11%	14%	12%	15%
6+ months before visit	11%	6%	11%	5%	12%	10%	12%	7%

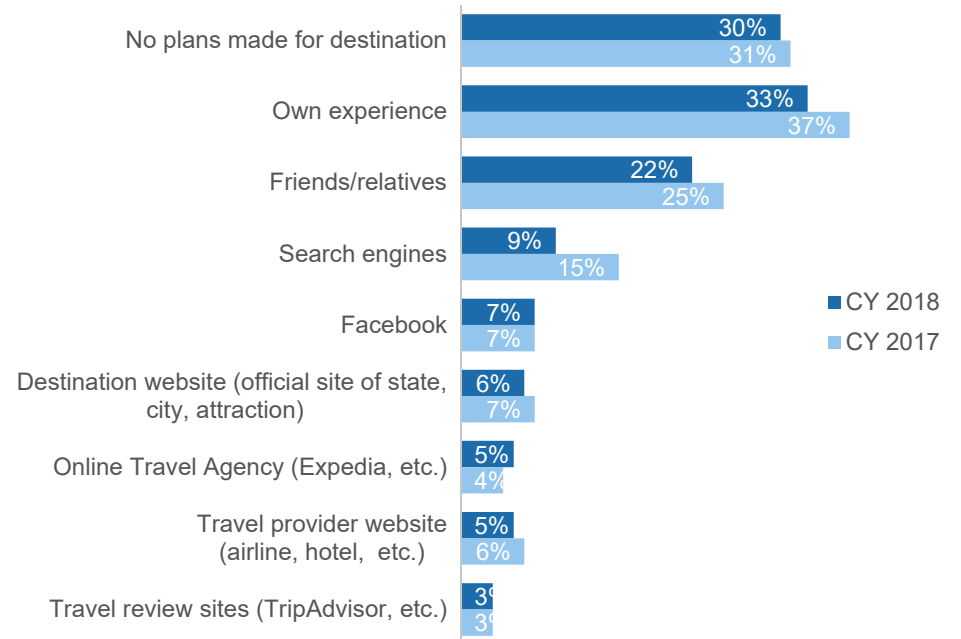
# Oklahoma visitors rely on their own experience (33%) and the advice of friends/relatives (22%) when planning their trip.

Top Information Sources Used to Plan by Segment

U.S. Domestic Travel vs. Oklahoma Visitors



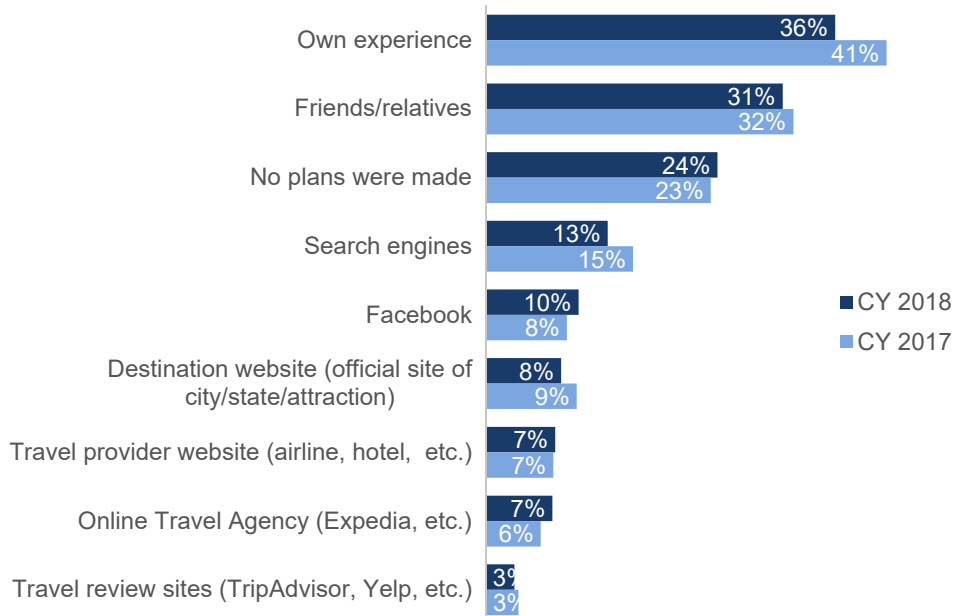
Oklahoma Visitors YOY



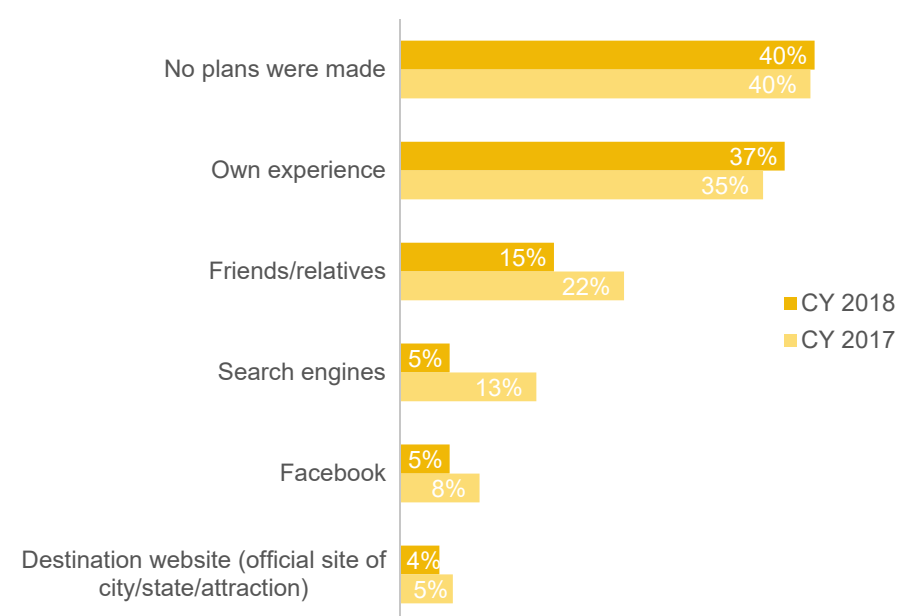
**Oklahoma's leisure overnight visitors rely on their own experience (36%) and advice from their friends/relatives (31%) when trip planning, while two in five leisure day visitors report making no plans.**

**Top Information Sources Used to Plan by Segment**

**Oklahoma Leisure Overnight Visitors YOY**



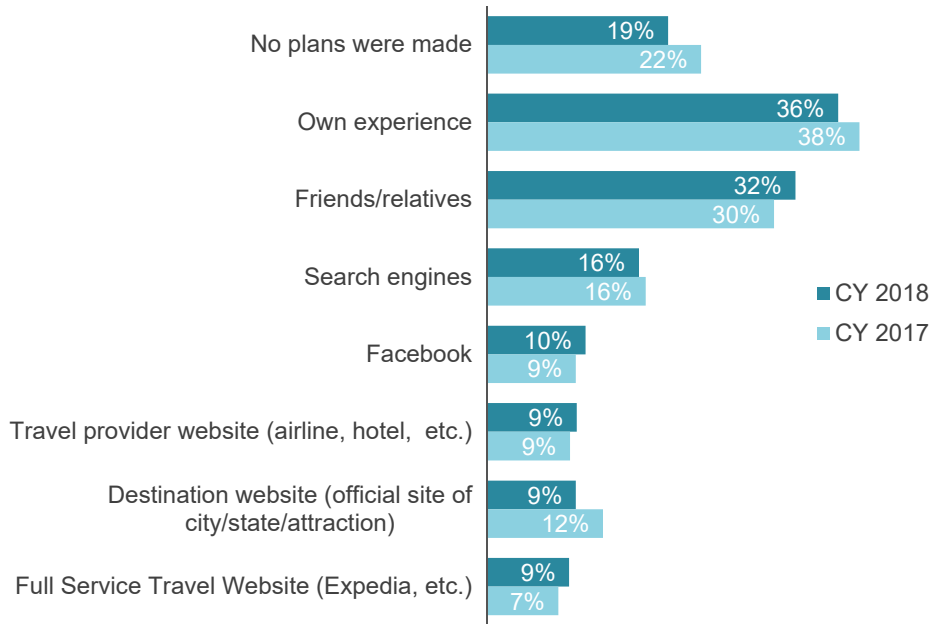
**Oklahoma Leisure Day Visitors YOY**



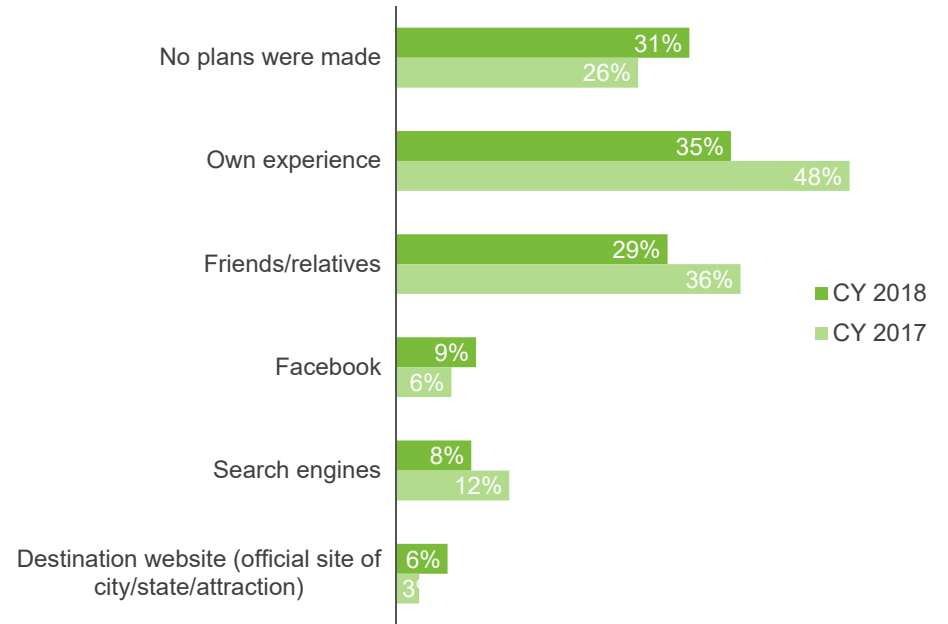
**Among Oklahoma’s leisure overnight visitors, those from out-of-state are more likely to use online sources for trip planning than in-state visitors, including search engines (16%), travel provider websites (9%), destination website (9%) and online travel agencies (9%).**

**Top Information Sources Used to Plan by Segment**

**Oklahoma Leisure Overnight Out-of-State Visitors YOY**



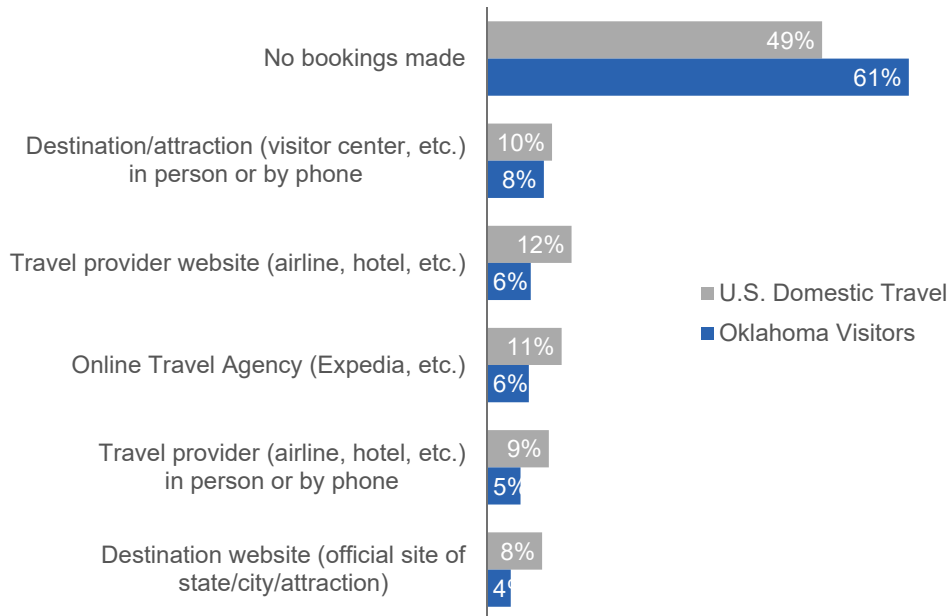
**Oklahoma Leisure Overnight In-State Visitors YOY**



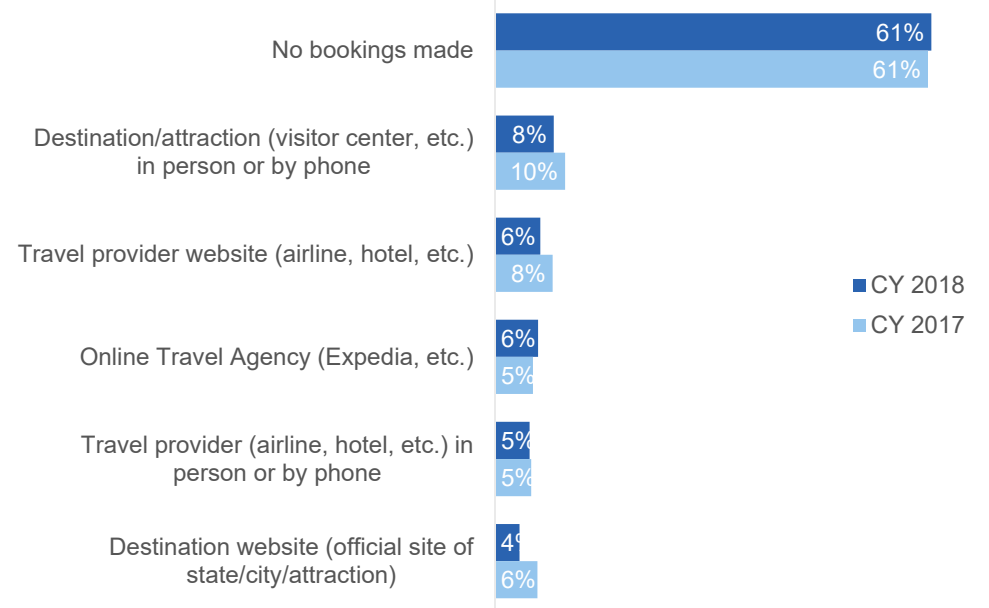
# Oklahoma visitors are less likely to book travel components than U.S. residents traveling on a domestic trip.

Top Booking Methods for Travel Components by Segment

U.S. Domestic Trips vs. Oklahoma Visitors



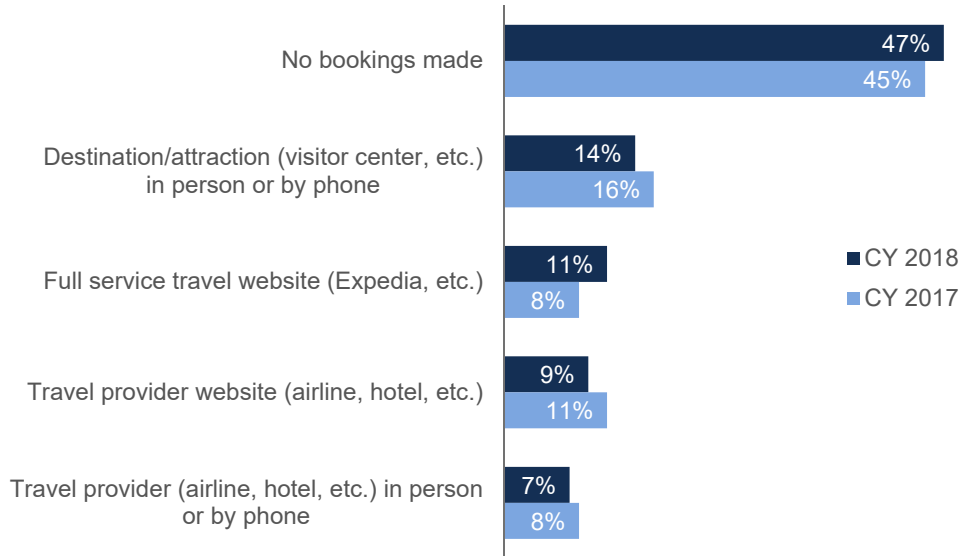
Oklahoma Visitors YOY



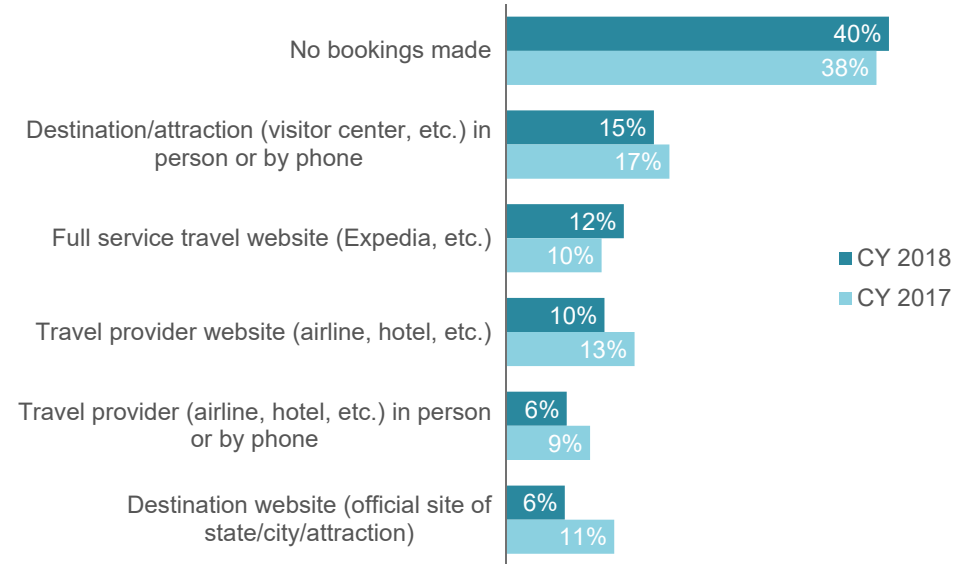
# Oklahoma leisure overnight visitors are most likely to book trip components with a destination or attraction in person or by phone than with any individual online method.

Top Booking Methods for Travel Components by Segment

Oklahoma Leisure Overnight Visitors YOY



Oklahoma Leisure Overnight Out-of-State Visitors YOY



**7**  
**Trip Characteristics**

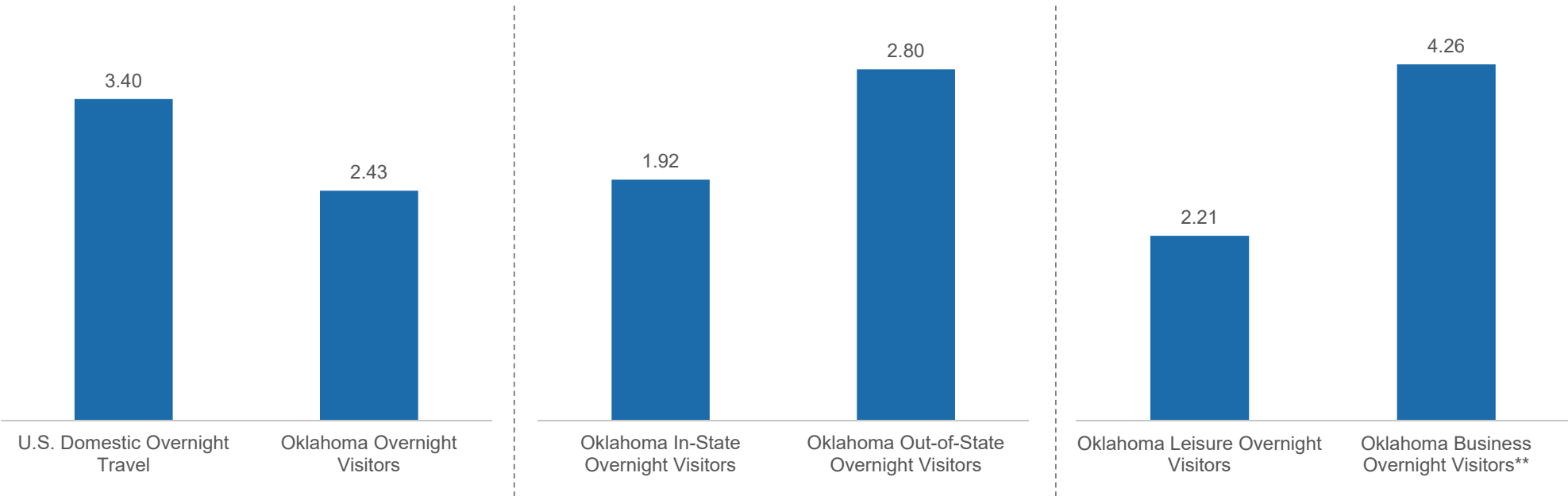


## Most Oklahoma visitors travel to/within the state using their own vehicle and are primarily are visiting their friends/relatives.

	U.S. Domestic Travel		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors		Oklahoma Leisure Overnight Visitors		Oklahoma Leisure Day Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
Primary Trip Purpose												
Leisure (net)	81%	80%	80%	76%	69%	68%	87%	84%	100%	100%	100%	100%
Visit Friends/Relatives	44%	42%	43%	39%	42%	36%	44%	43%	57%	56%	48%	45%
Outdoor Recreation	9%	9%	7%	7%	7%	7%	7%	7%	8%	10%	10%	8%
Entertainment/Sightseeing	14%	14%	13%	12%	7%	9%	16%	15%	15%	12%	17%	24%
Other Personal	14%	15%	17%	17%	14%	16%	20%	19%	20%	23%	25%	23%
Personal Business	6%	8%	9%	11%	17%	18%	3%	2%				
Business	10%	10%	9%	9%	9%	7%	9%	11%		-		-
Other	3%	3%	3%	5%	5%	7%	2%	4%		-		-
Primary Transportation Mode												
Own Car/Truck	74%	75%	87%	88%	96%	92%	81%	84%	84%	89%	92%	94%
Rental Vehicle	6%	5%	3%	3%	2%	0%	5%	5%	4%	3%	3%	1%
Air Travel	14%	13%	6%	4%	0%	1%	9%	7%	7%	3%	2%	1%
Other	6%	7%	4%	5%	3%	7%	5%	4%	5%	5%	3%	4%

Although Oklahoma's overnight business visitors, on average stay the most nights in the state, they represent less than one-tenth of Oklahoma's visitor volume.

Overnight Visitors Average Length of Stay by Segment (in Nights)

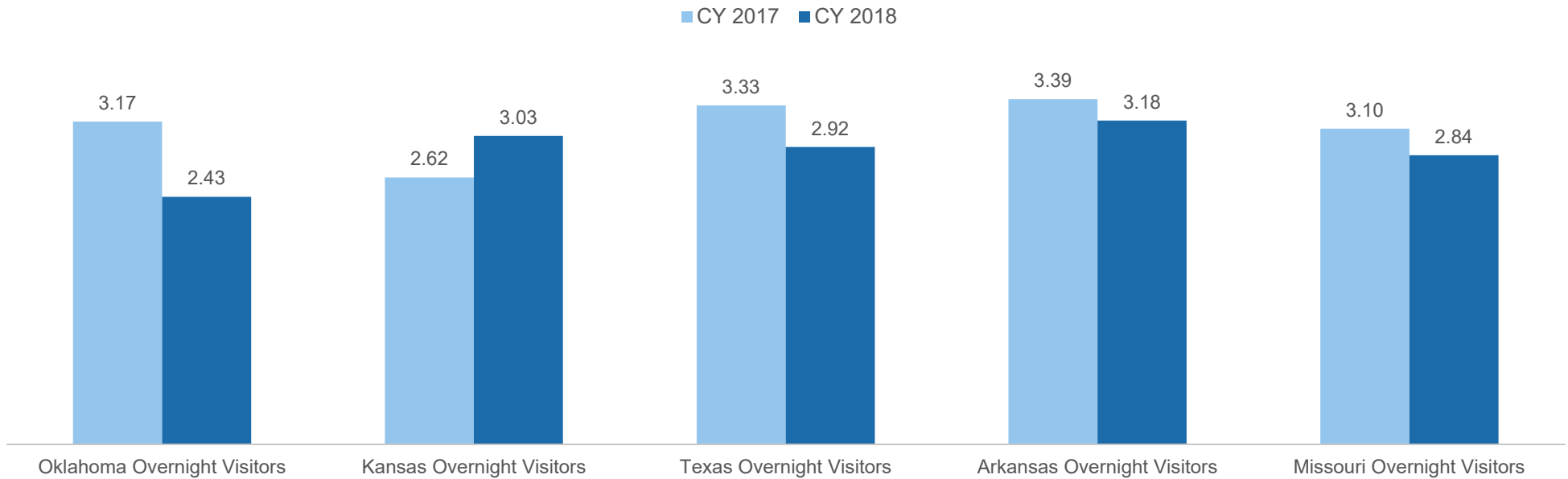


**Oklahoma’s proportion of visitors whose purpose is entertainment/sightseeing is greater than Kansas, Texas and Arkansas. Oklahoma most closely resembles the U.S. and Arkansas in terms of the proportion of visitors traveling for business and to visit friends/relatives.**

	U.S. Domestic Travel		Oklahoma Visitors		Kansas Visitors		Texas Visitors		Arkansas Visitors		Missouri Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
<b>Primary Trip Purpose</b>												
Leisure (net)	81%	80%	80%	76%	78%	75%	77%	74%	80%	74%	80%	81%
Visit Friends/Relatives	44%	42%	43%	39%	54%	51%	48%	44%	48%	38%	43%	42%
Outdoor Recreation	9%	9%	7%	7%	6%	6%	8%	8%	9%	14%	8%	8%
Entertainment/Sightseeing	14%	14%	13%	12%	7%	6%	9%	10%	9%	9%	16%	18%
Other Personal	14%	15%	17%	17%	11%	12%	11%	12%	14%	12%	13%	13%
Personal Business	6%	8%	9%	11%	7%	15%	7%	10%	9%	12%	9%	8%
Business	10%	10%	9%	9%	13%	7%	14%	12%	7%	10%	10%	8%
Other	3%	3%	3%	5%	3%	2%	3%	3%	5%	4%	2%	3%
<b>Primary Transportation Mode</b>												
Own Car/Truck	74%	75%	87%	88%	85%	82%	77%	80%	85%	84%	86%	87%
Rental Vehicle	6%	5%	3%	3%	4%	5%	6%	5%	5%	5%	3%	3%
Air Travel	14%	13%	6%	4%	7%	8%	12%	10%	4%	5%	8%	7%
Other	6%	7%	4%	5%	4%	5%	5%	4%	6%	6%	3%	3%

**Overnight visitors, on average stayed fewer nights in Oklahoma during 2018, compared to the previous year. Oklahoma overnight visitors' average length of stay also fell below that of other competitor states.**

**Overnight Visitors Average Length of Stay in Each Regional State YOY**  
(in Nights)



**The average travel party size of Oklahoma visitors remained consistent year-over-year. The percentage of family travel parties fell among in-state visitors but increased among those visiting from another state.**

	U.S. Domestic Travel		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors		Oklahoma Leisure Overnight Visitors		Oklahoma Leisure Day Visitors		Oklahoma Business Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	2018
Average Travel Party Size	2.55	2.56	2.41	2.41	2.48	2.24	2.37	2.60	2.31	2.39	2.70	2.63	2.11	2.33
Adults in Travel Party														
One Adult	29%	30%	30%	35%	35%	39%	27%	31%	28%	35%	21%	24%	60%	63%
Two Adults	55%	54%	58%	52%	53%	51%	61%	53%	61%	56%	62%	56%	26%	17%
Three Adults	8%	8%	6%	8%	7%	7%	6%	9%	6%	5%	9%	13%	4%	7%
Four or More Adults	8%	8%	6%	6%	5%	4%	6%	8%	4%	5%	8%	6%	10%	14%
Family Travel														
Travel with children from household	25%	26%	24%	23%	29%	21%	20%	26%	22%	28%	31%	21%	5%**	4%**
Average Number of Children in Party	1.71	1.72	1.75	1.64	1.96	1.54	1.53	1.74	1.72	1.63	1.77	1.81	1.69	1.85

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

\*\*Sample size less than 10

**Oklahoma under performs on family travel, with family travel parties representing a lower portion of the state’s visitors compared to overall U.S. domestic travel and visitors to neighboring states.**

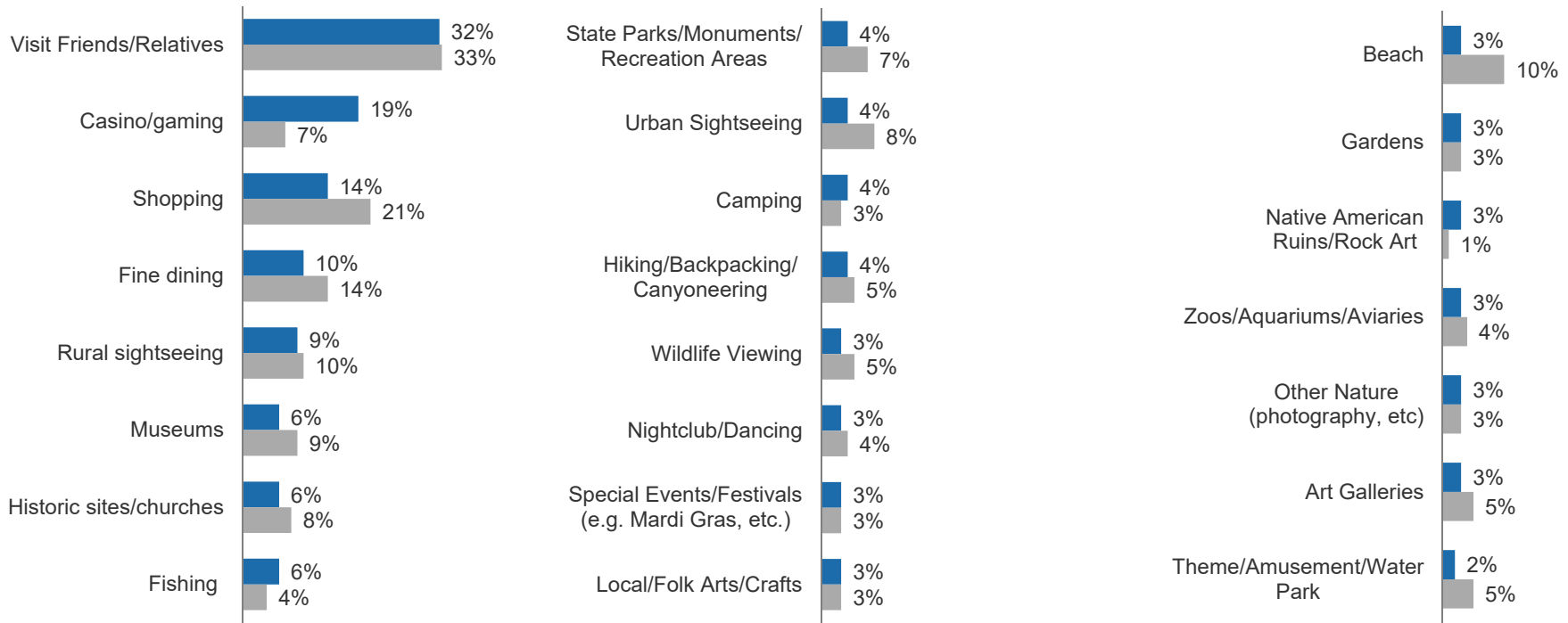
	U.S. Domestic Travel		Oklahoma Visitors		Arkansas Visitors		Kansas Visitors		Missouri Visitors		Texas Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
Average Travel Party Size	2.55	2.56	2.41	2.41	2.46	2.54	2.62	2.56	2.56	2.63	2.57	2.55
Adults in Travel Party												
One Adult	29%	30%	30%	35%	28%	32%	31%	32%	26%	25%	33%	33%
Two Adults	55%	54%	58%	52%	58%	56%	56%	55%	58%	59%	53%	52%
Three Adults	8%	8%	6%	8%	7%	7%	7%	9%	8%	9%	7%	8%
Four or More Adults	8%	7%	6%	6%	6%	4%	6%	4%	8%	7%	7%	7%
Family Travel												
Travel with children from household	25%	26%	24%	23%	26%	33%	29%	28%	24%	25%	29%	30%
Average Number of Children in Party	1.71	1.72	1.75	1.64	1.67	1.68	1.89	1.95	1.74	1.78	1.69	1.68

# Oklahoma visitors are more likely to enjoy casinos and gaming than overall U.S. travelers.

## Top Activities/Attractions in 2018

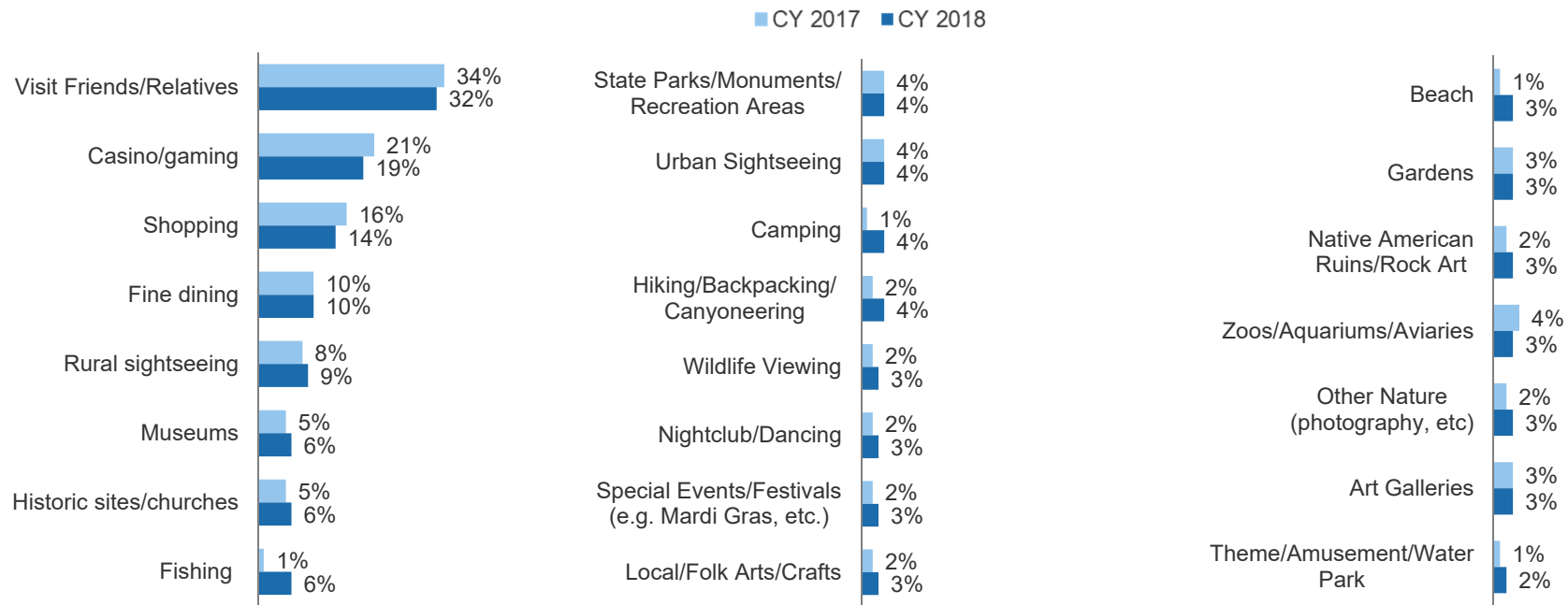
(ranked by Oklahoma visitors)

■ Oklahoma Visitors ■ U.S. Domestic Travelers



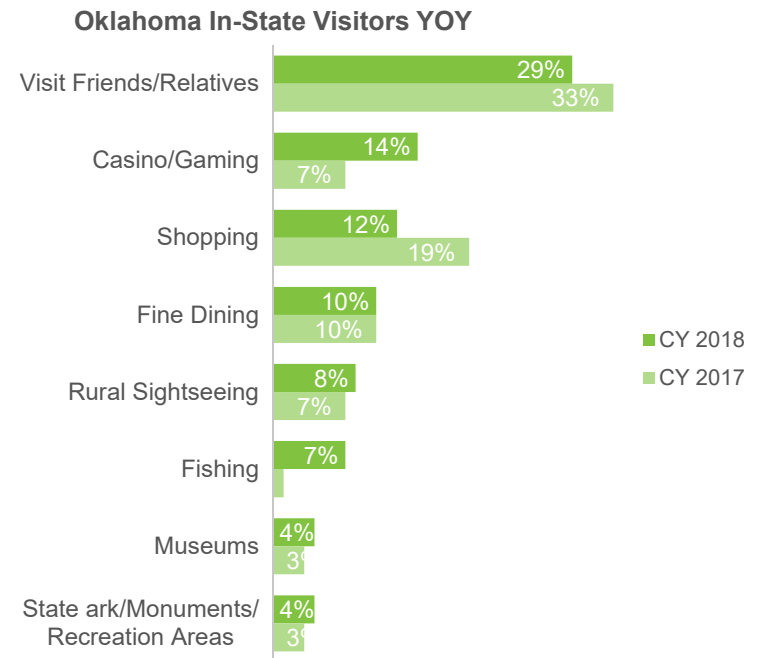
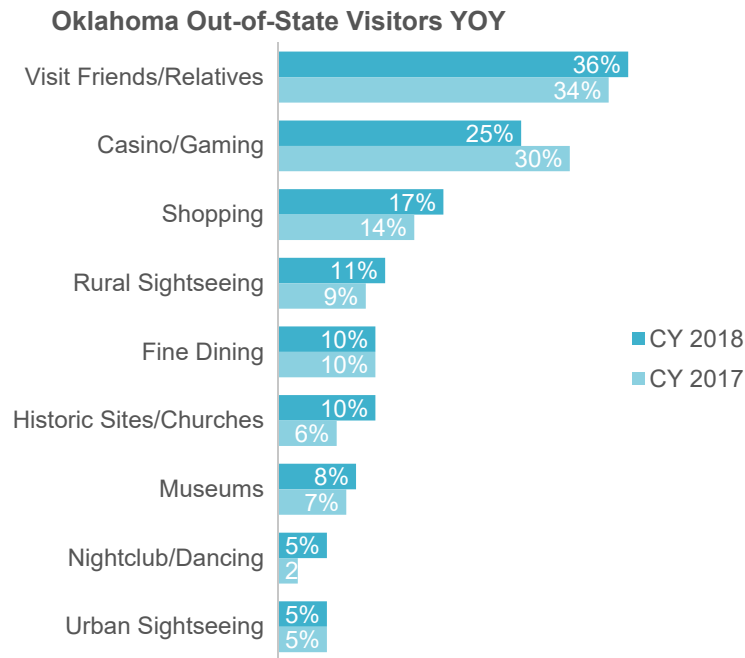
**Although the percentage of Oklahoma visitors participating in the top four activities was down—including visiting friends/relatives, casino gambling, shopping and fine dining—the actual number of respondents who reported participating in these activities increased.**

**Top Activities/Attractions for Oklahoma Visitors YOY**  
(ranked by Oklahoma visitors)



**After visiting friends and relatives, casinos and gaming are the second most enjoyed activity among Oklahoma visitors. A higher percentage of out-of-state visitors report casinos and gaming than in-state visitors.**

**Top Activities/Attractions for Oklahoma Visitors by Segment YOY**

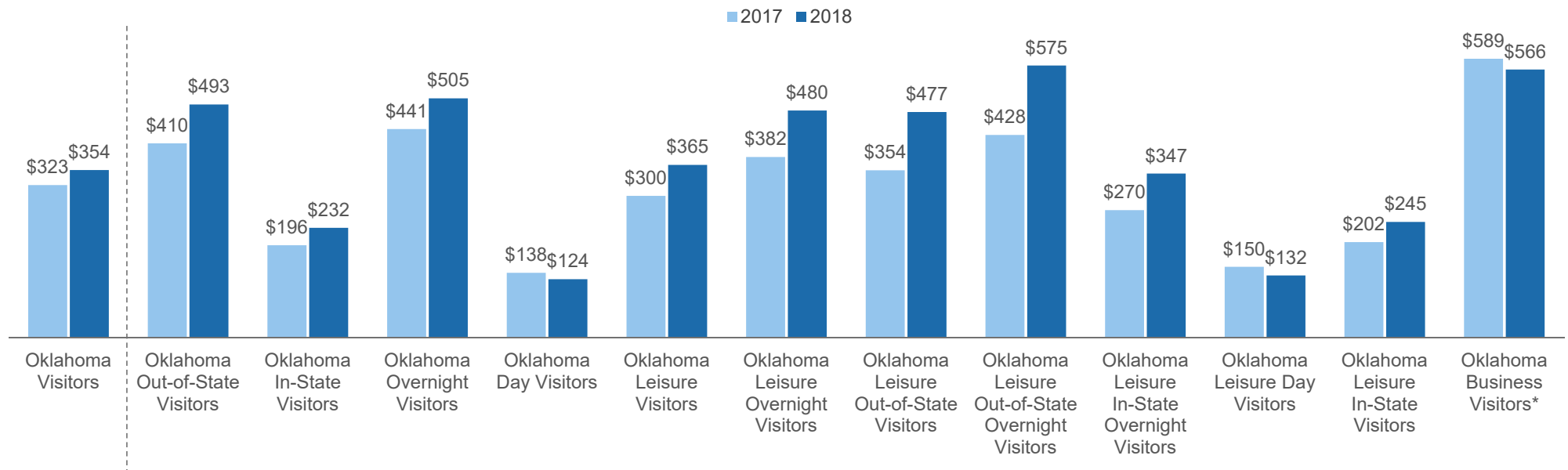


**8**  
**Expenditures**



**Oklahoma leisure overnight visitors traveling from another state spent the most per trip on average and account for 39% of visitation. Oklahoma business visitors had the second highest spending, but only represent 7% of visitors.**

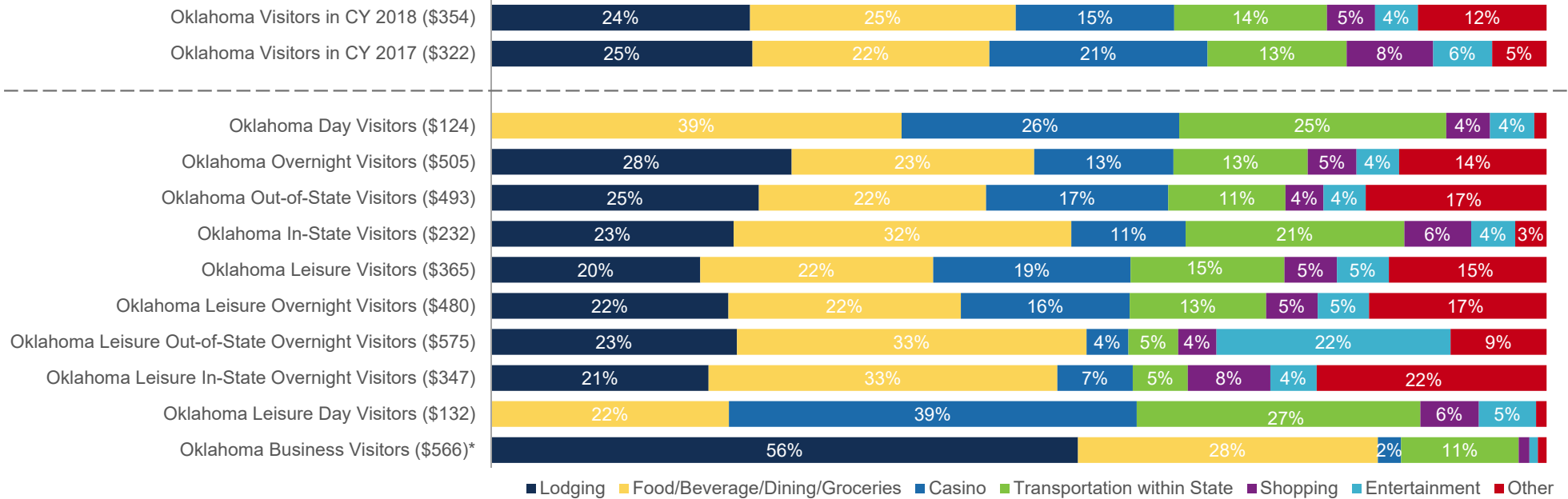
**Average Expenditure Per Travel Party within Oklahoma by Visitor Segment**



Oklahoma's leisure out-of-state overnight visitors spent the most per trip, with the largest portion of their total spending put towards lodging. Oklahoma day visitors and leisure day visitors spent the least, with the highest portion of their spending on casinos.

### Average Expenditure Per Travel Party Per Trip in Oklahoma by Segment

(figures exclude transportation cost to get to state and include responses of \$0)



**In terms of dollar amount, Oklahoma visitors spent the most on food and lodging within the state. As observed last year, business visitors spent the most on lodging.**

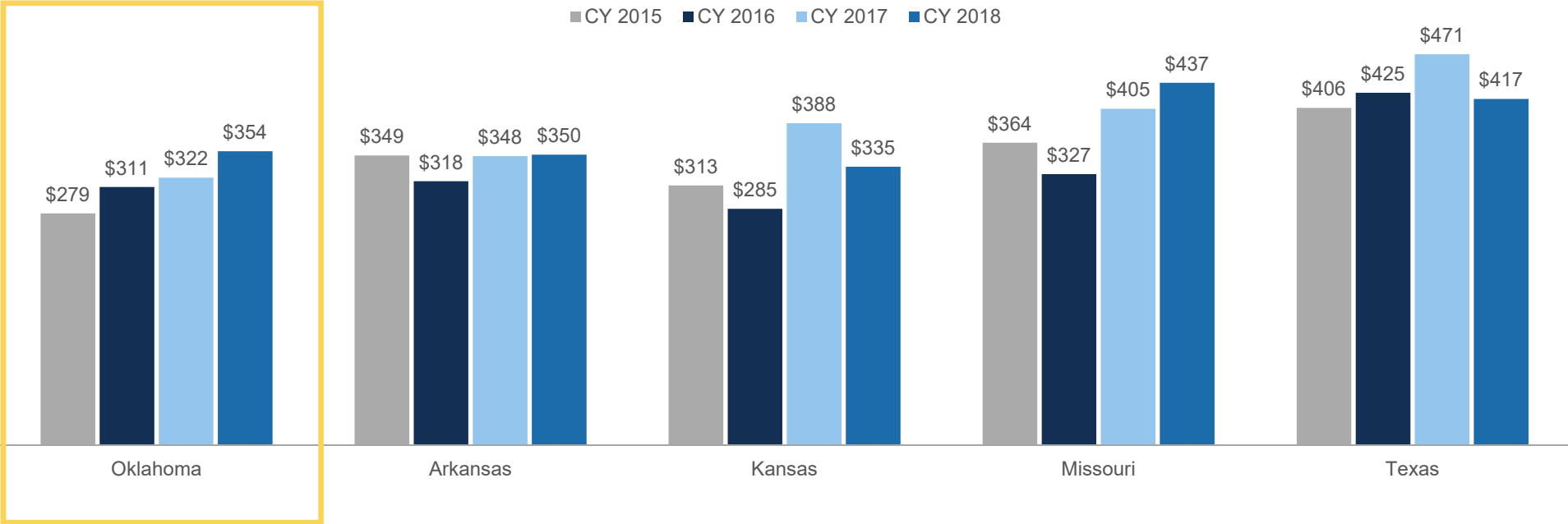
	Oklahoma Visitors in CY 2018	Oklahoma Day Visitors	Oklahoma Overnight Visitors	Oklahoma Out-of-State Visitors	Oklahoma In-State Visitors	Oklahoma Leisure Visitors	Oklahoma Leisure Overnight Visitors	Oklahoma Leisure Out-of-State Overnight Visitors	Oklahoma Leisure In-State Overnight Visitors	Oklahoma Leisure Day Visitors	Oklahoma Business Visitors*
<b>Total Spent</b>	<b>\$354</b>	<b>\$124</b>	<b>\$505</b>	<b>\$493</b>	<b>\$232</b>	<b>\$365</b>	<b>\$480</b>	<b>\$575</b>	<b>\$347</b>	<b>\$132</b>	<b>\$566</b>
Lodging	\$87	\$0	\$144	\$125	\$53	\$72	\$108	\$134	\$71	\$0	\$315
Food/Beverage/Dining/Groceries	\$89	\$48	\$116	\$106	\$74	\$81	\$106	\$190	\$115	\$48	\$161
Casino	\$53	\$33	\$67	\$85	\$25	\$68	\$77	\$23	\$25	\$33	\$13
Transportation within State	\$51	\$31	\$64	\$55	\$48	\$53	\$62	\$27	\$18	\$31	\$63
Shopping	\$16	\$5	\$23	\$18	\$15	\$18	\$23	\$21	\$27	\$5	\$6
Entertainment	\$14	\$5	\$20	\$20	\$10	\$18	\$23	\$127	\$15	\$5	\$5
Other	\$43	\$1	\$71	\$84	\$7	\$55	\$81	\$52	\$76	\$1	\$5

**Average spend per travel party among Oklahoma, Arkansas, and Missouri visitors increased, while it decreased among Kansas and Texas visitors.**

**Average Expenditure Per Travel Party within Each Regional State**

(figures exclude transportation cost to get to state and include responses of \$0)

■ CY 2015 ■ CY 2016 ■ CY 2017 ■ CY 2018

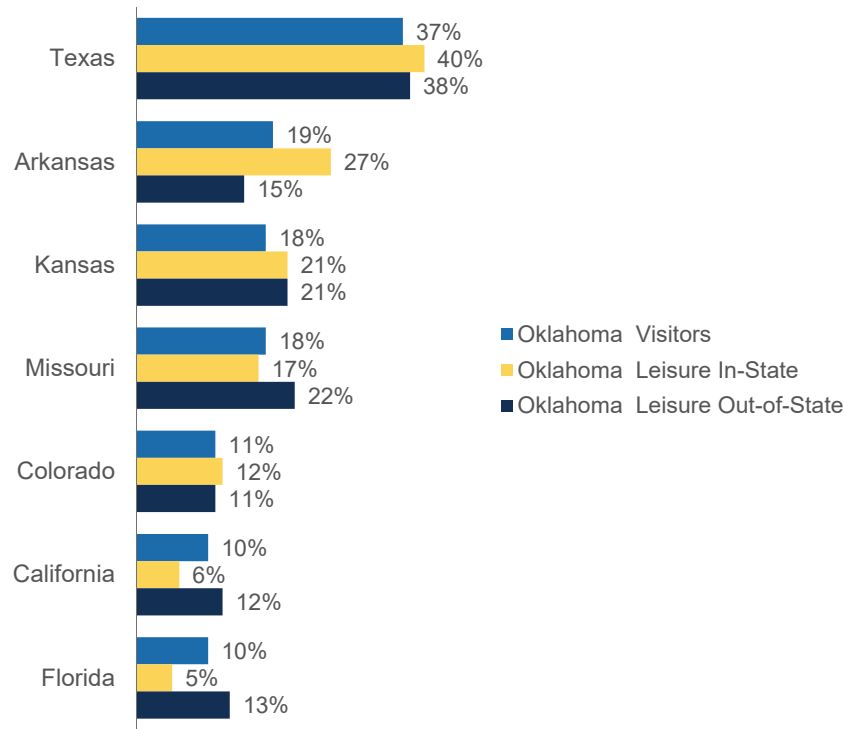


# 9 Competitive Environment

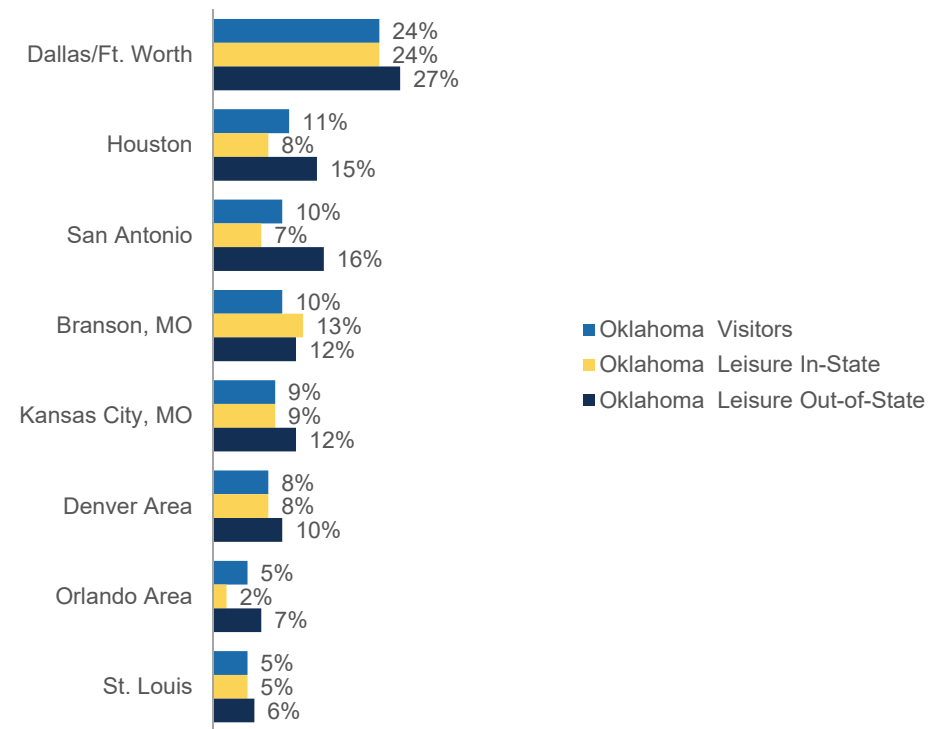


# Proximity defines competition, with the top other states visited by Oklahoma's past year visitors bordering the state.

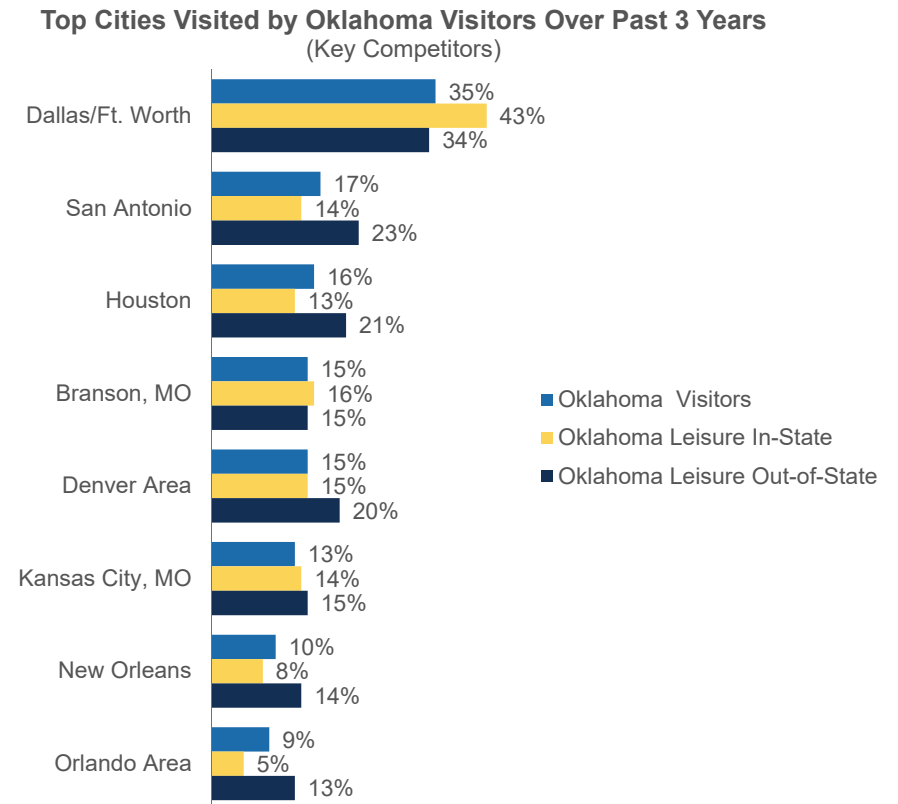
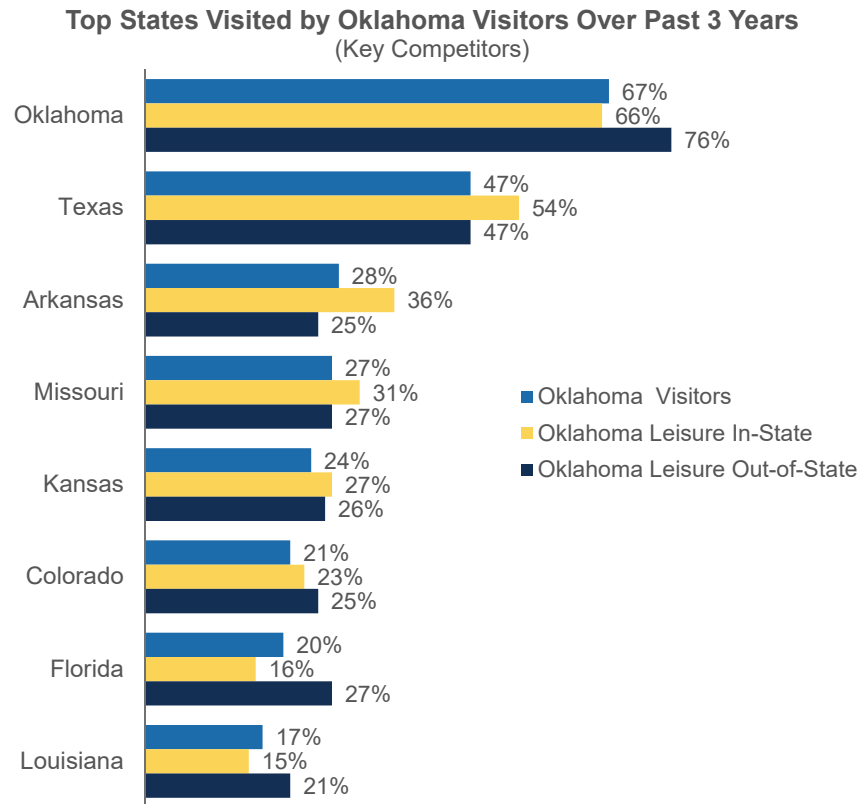
**Top States Visited by Oklahoma Visitors Over Past Year**  
(Key Competitors)



**Top Cities Visited by Oklahoma Visitors Over Past Year**  
(Key Competitors)



## Leisure out-of-state visitors travel to a broader and a more distant variety of destinations, compared to leisure in-state visitors.



## Each state has key cities that attract the majority of their visitors.

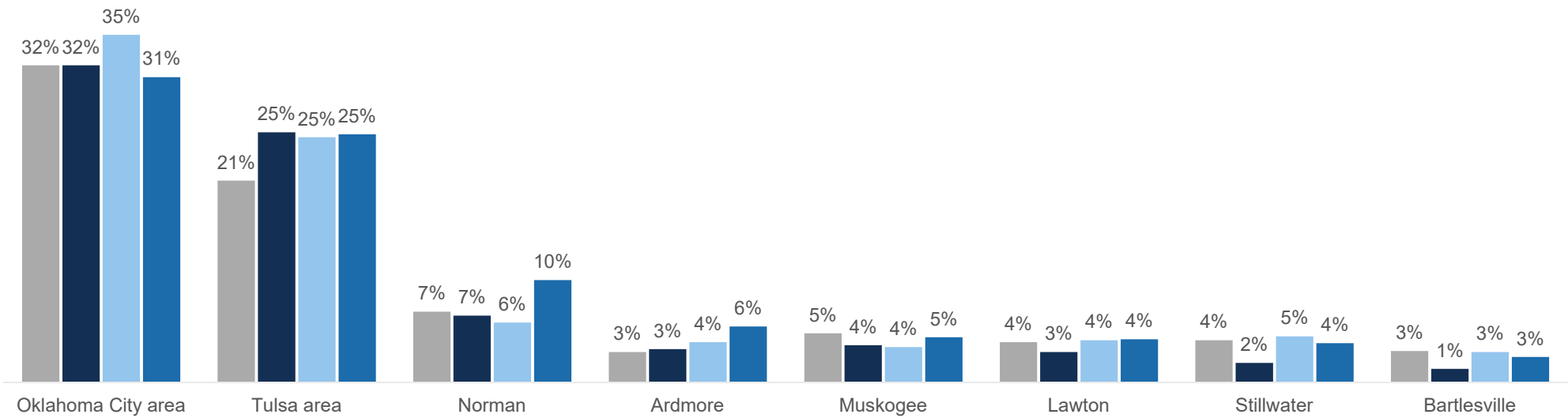
### Top Destinations within Each Regional State

Oklahoma Visitors	CY 2018	Arkansas Visitors	CY 2018	Kansas Visitors	CY 2018	Missouri Visitors	CY 2018	Texas Visitors	CY 2018
Oklahoma City area	31%	Little Rock	27%	Kansas City area	28%	St. Louis Area	26%	Dallas area	19%
Tulsa area	25%	Hot Springs	15%	Wichita	16%	Kansas City are	18%	Houston area	17%
Norman	10%	Fayetteville	14%	Topeka	12%	Branson	15%	San Antonio area	14%
Ardmore	6%	Fort Smith	10%	Manhattan	10%	Springfield	12%	Austin area	13%
Muskogee	5%	Texarkana	7%	Salina	8%	Columbia	7%	Fort Worth area	7%
Lawton	4%	Eureka Springs	6%	Lawrence	6%	Lake of Ozarks area	7%	Galveston	4%
Stillwater	4%	Pine Bluff	6%	Dodge City	4%	St. Joseph	4%	Waco	4%
Bartlesville	3%			Emporia	4%	Jefferson City	3%	Amarillo	3%
				Hutchinson	3%	Joplin/Carthage	3%	Corpus Christi	3%
				Abilene	1%	Cape Girardeau	2%	Lubbock	3%
						St. Charles	2%	Abilene	2%
						Hannibal	1%	Beaumont/Port Arthur	2%
						Independence	1%	El Paso	2%
								Wichita Falls	2%
								Brownsville	1%
								Laredo	1%
								Midland/Odessa	1%

# Oklahoma City and Tulsa dwarf other Oklahoma destination choices, though the percentage of Oklahoma visitors to Oklahoma city fell year-over-year.

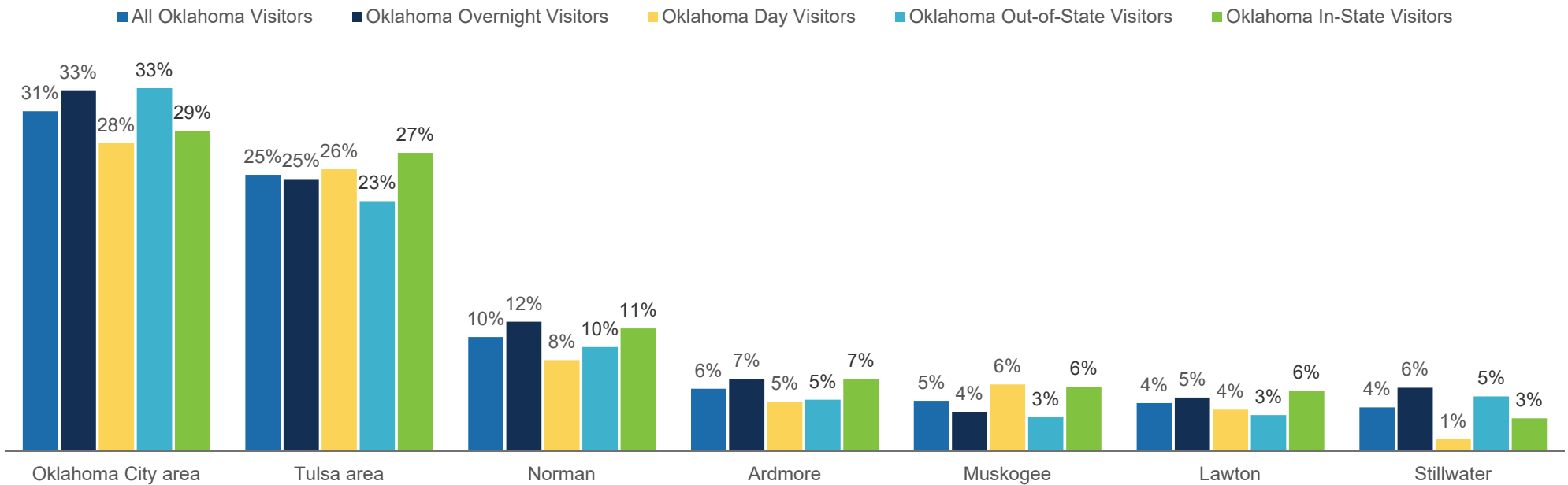
## Trends in Top Oklahoma Destinations for Visitors

■ CY 2015 ■ CY 2016 ■ CY 2017 ■ CY 2018



# Oklahoma City and Tulsa dwarf other Oklahoma destination choices among each of the visitor segments.

Top Oklahoma Destinations for Visitors, Overnight Visitors, and Day Visitors in 2018



**Although the two largest cities continue to dominate among Oklahoma visitors, the percentage of overnight and day visitors to Oklahoma City declined, while day visitors to Tulsa were also down.**

**Trends in Top Oklahoma Destinations for Overnight and Day Visitors**

Oklahoma Overnight Visitors				
	CY 2015	CY 2016	CY 2017	CY 2018
Oklahoma City area	37%	31%	36%	33%
Tulsa area	23%	28%	28%	25%
Norman	7%	6%	8%	12%
Ardmore	3%	4%	4%	7%
Stillwater	4%	2%	5%	6%
Lawton	5%	4%	5%	5%
Muskogee	3%	3%	4%	4%
Bartlesville	3%	2%	3%	3%

Oklahoma Day Visitors				
	CY 2015	CY 2016	CY 2017	CY 2018
Oklahoma City area	25%	35%	34%	28%
Tulsa area	17%	20%	20%	26%
Norman	7%	8%	4%	8%
Muskogee	8%	5%	4%	6%
Ardmore	3%	3%	4%	5%
Lawton	1%	2%	4%	4%
Bartlesville	4%	1%	3%	2%
Stillwater	4%	2%	4%	1%

**Out-of-state visitors to Oklahoma city and Tulsa remained consistent year-over-year, the percentage of in-state visitors to Oklahoma city declined and the percentage to Tulsa slightly declined.**

**Trends in Top Oklahoma Destinations for Out-of-State and In-State Visitors**

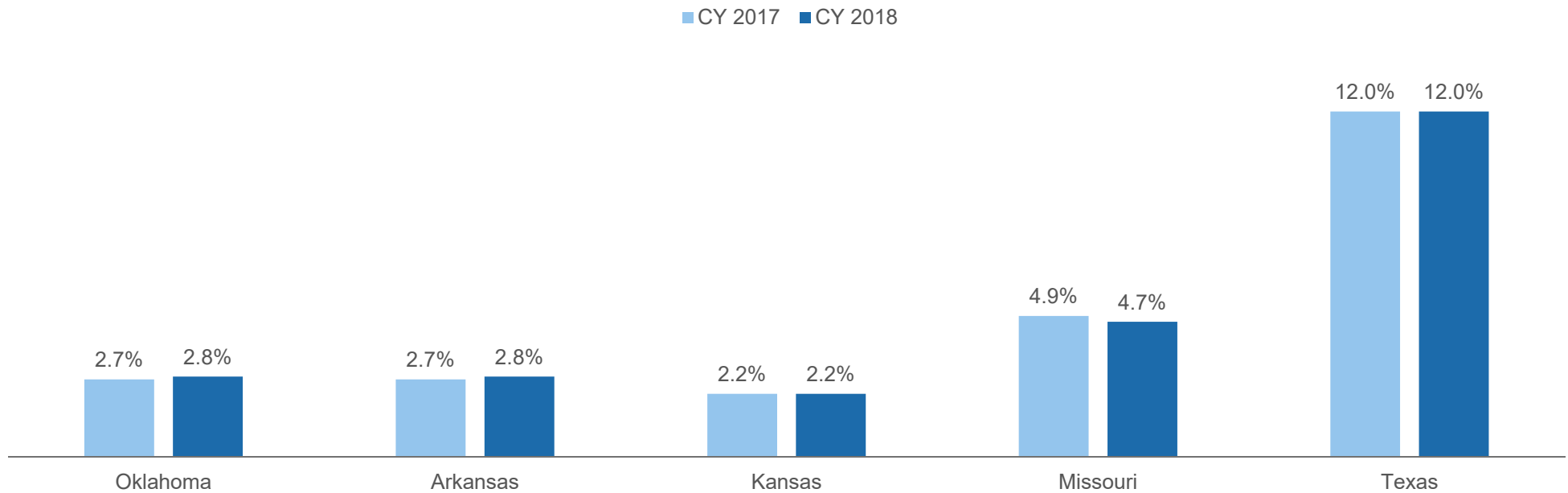
Oklahoma Out-of-State Visitors				
	CY 2015	CY 2016	CY 2017	CY 2018
Oklahoma City area	34%	30%	33%	33%
Tulsa area	20%	29%	23%	23%
Norman	11%	7%	6%	10%
Stillwater	3%	2%	4%	5%
Ardmore	4%	5%	5%	5%
Lawton	3%	3%	5%	3%
Muskogee	4%	2%	4%	3%
Bartlesville	3%	2%	3%	2%

Oklahoma In-State Visitors				
	CY 2015	CY 2016	CY 2017	CY 2018
Oklahoma City area	30%	35%	38%	29%
Tulsa area	21%	22%	28%	27%
Norman	4%	7%	6%	11%
Ardmore	3%	2%	3%	7%
Muskogee	6%	6%	4%	6%
Lawton	5%	3%	3%	6%
Stillwater	5%	2%	6%	3%
Bartlesville	3%	1%	4%	3%

## Oklahoma lands in the middle of its competitive set on intent to visit.

- Intent to visit increased slightly for Oklahoma and Arkansas, while decreasing slightly for Missouri and remaining static for Texas and Kansas.

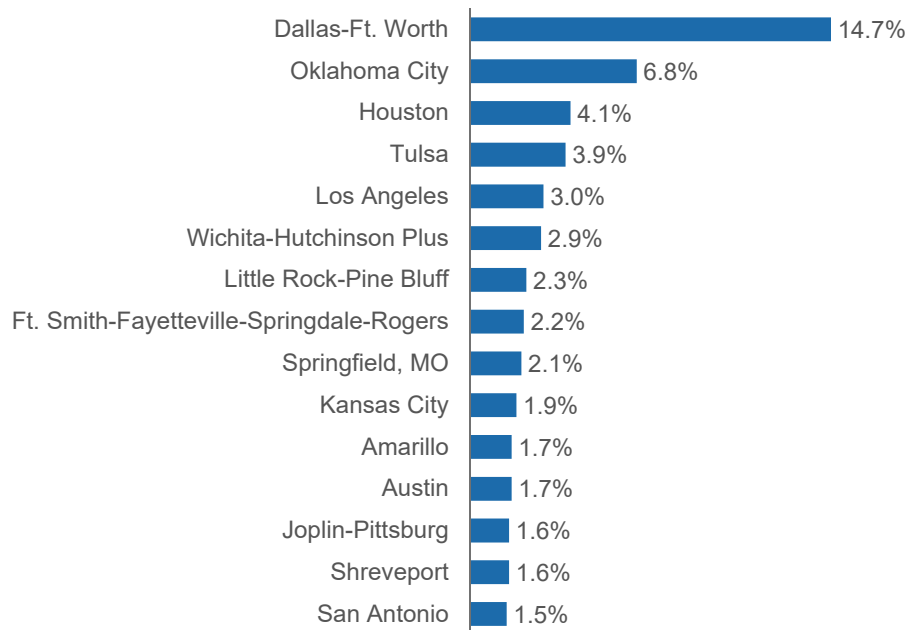
Intent to Visit within Next 2 Years by Competitive Set State



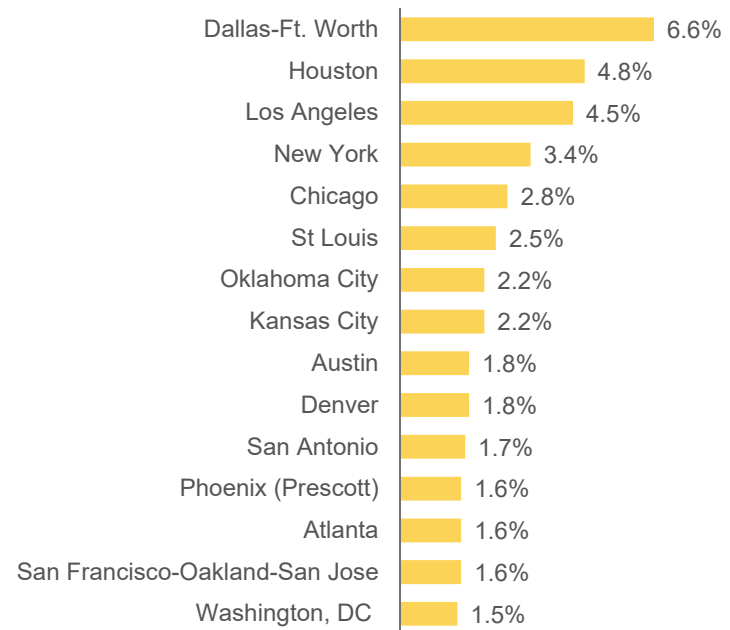
## Slightly more than half of those intending to visit Oklahoma (52%) reside in fifteen DMAs.

- Most respondents intending to visit Oklahoma reside in cities of neighboring states, while several east coast cities are included among Oklahoma's competitive set.

**Top DMAs for Intent to Visit Oklahoma**

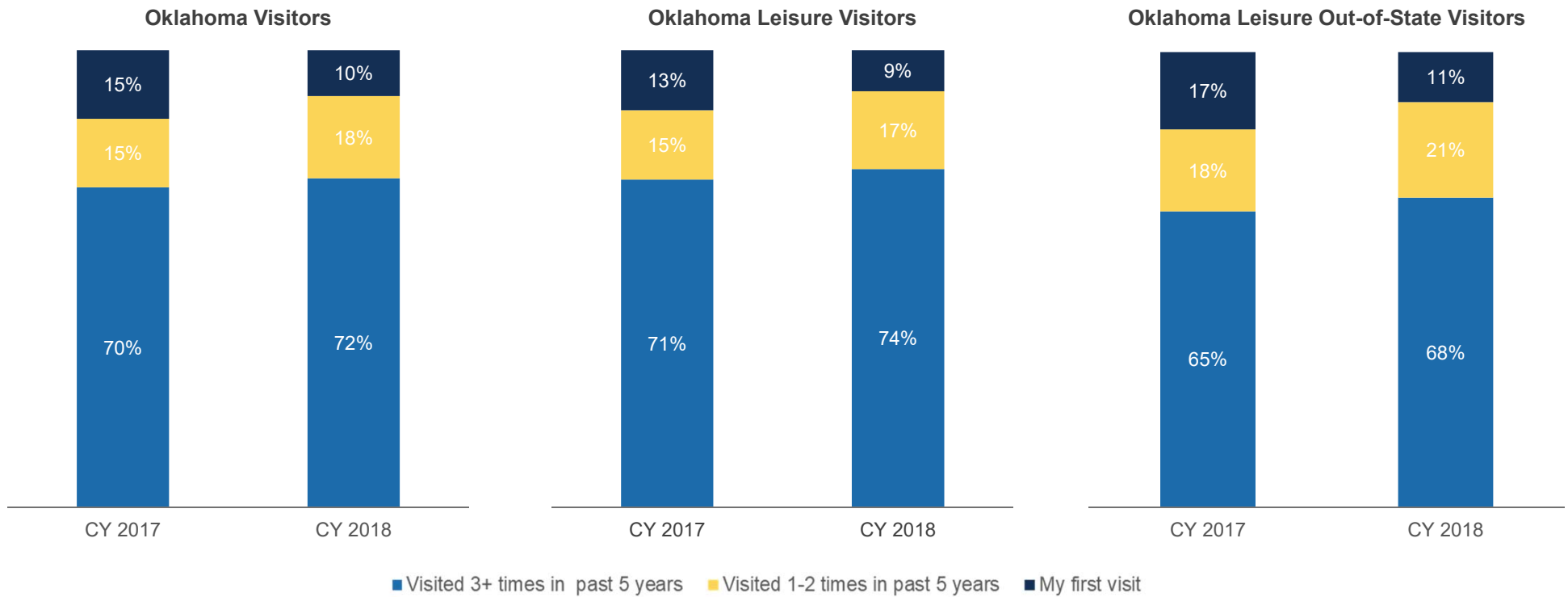


**Top DMAs for Intent to Visit Competitive Set Region**



## Oklahoma retains visitors, with a greater portion of visitors to the state in 2018 being repeat visitors.

- In order to grow a visitor base, it is important increase first time visitors and retain visitors who previously visited.

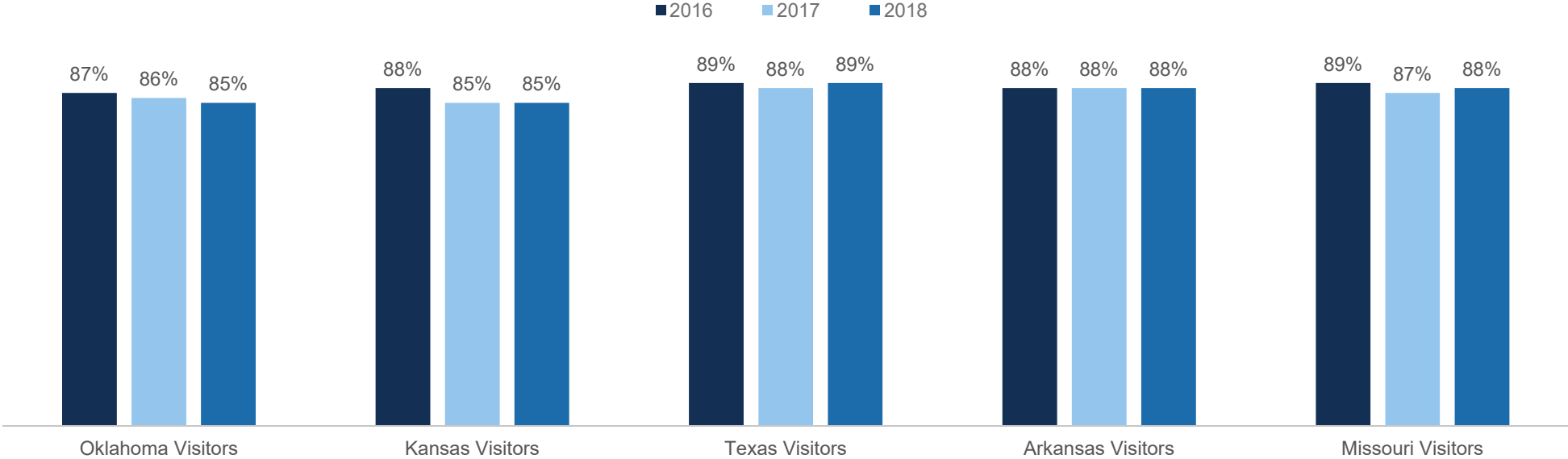


**10**  
**Satisfaction**



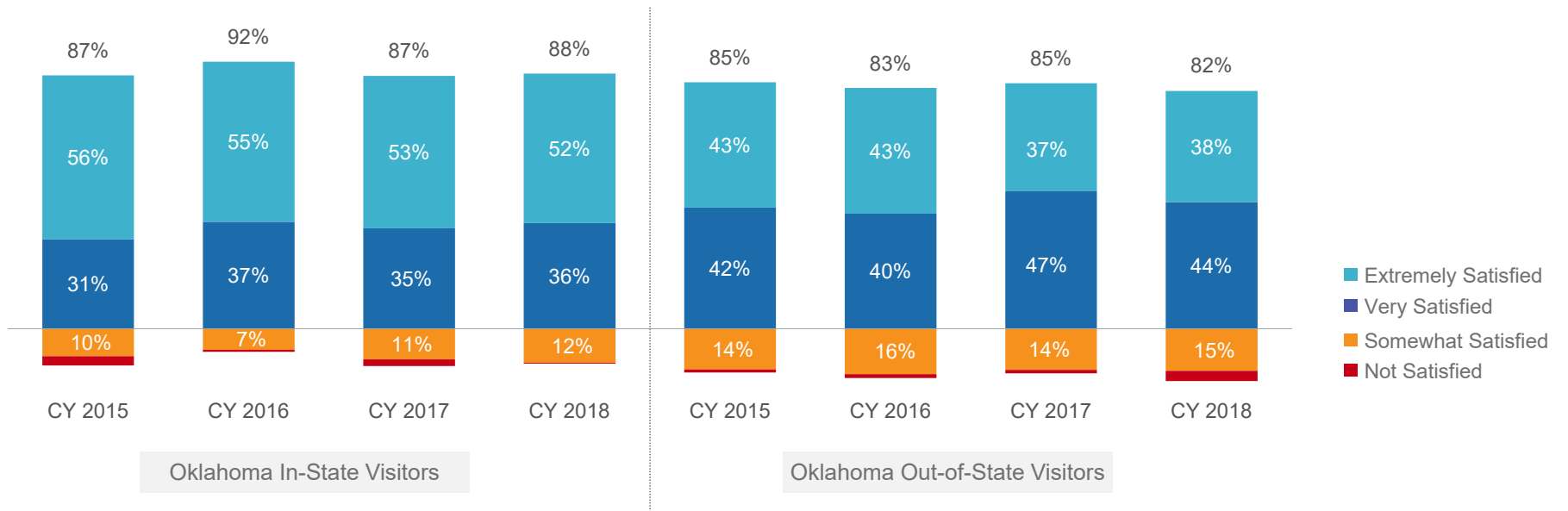
Although most Oklahoma visitors were either extremely or very satisfied with their visit (85%) in 2018, the percentage did slip one percentage point for a second consecutive year. Compared to other states, Oklahoma's visitor satisfaction was on par with Kansas.

Satisfaction: Extremely/Very Satisfied with Visit to State



**Overall satisfaction with Oklahoma among in-state visitors slightly increased from the prior year, while satisfaction slightly dipped among out-of-state visitors.**

Satisfaction with Oklahoma Visit among In-State and Out-of-State Visitors



**11**  
**Demographics**



## Demographics

Demographics	All U.S. Visitors		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
Male	44%	41%	40%	35%	39%	33%	41%	38%
<b>Age</b>								
18-24	9%	9%	9%	5%	8%	4%	9%	7%
25-34	25%	24%	23%	19%	28%	18%	19%	20%
35-44	16%	17%	14%	13%	15%	10%	14%	16%
45-54	17%	17%	18%	19%	22%	17%	16%	21%
55+	33%	33%	36%	45%	27%	52%	43%	36%
Average Age	45	46	47.1	50.3	44	52.6	49.2	47.6
<b>Household Income</b>								
Under \$30,000	13%	14%	17%	26%	28%	37%	9%	13%
\$30,000-\$49,999	16%	16%	17%	13%	21%	11%	14%	15%
\$50,000-\$74,999	20%	20%	27%	22%	24%	20%	28%	24%
\$75,000-\$99,999	15%	15%	14%	16%	12%	15%	16%	18%
\$100,000 or More	38%	37%	26%	23%	16%	18%	33%	29%
Average Household Income	\$89,310	\$88,110	\$75,440	\$72,200	\$60,380	\$60,980	\$85,860	\$84,960
<b>Employment</b>								
Employed (Full-time or Part-time)	65%	65%	57%	54%	54%	42%	60%	67%
Retired	19%	20%	24%	30%	22%	38%	25%	20%
Not employed	15%	15%	18%	16%	23%	20%	15%	12%
<b>Marital Status</b>								
Now Married	62%	61%	65%	61%	66%	66%	63%	56%
Never Married	26%	26%	20%	20%	21%	21%	19%	19%

## Demographics

Demographics	All U.S. Visitors		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors	
	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018	CY 2017	CY 2018
Hispanic Origin	8%	7%	5%	4%	3%	2%	7%	7%
<b>Race</b>								
Caucasian/White	86%	86%	83%	88%	81%	88%	85%	88%
African-American/Black	5%	6%	4%	3%	2%	4%	5%	3%
American Indian, Aleut Eskimo	1%	1%	7%	5%	14%	6%	3%	3%
Asian, Pacific Islander	5%	5%	2%	2%	1%	1%	4%	3%
Other	3%	3%	3%	2%	2%	1%	4%	3%
<b>Household Size</b>								
1	14%	15%	15%	15%	17%	17%	14%	13%
2	40%	39%	45%	43%	39%	48%	49%	38%
3	19%	19%	15%	16%	17%	15%	14%	18%
4	17%	17%	15%	13%	14%	12%	15%	14%
5+	11%	11%	10%	13%	13%	9%	8%	17%
<b>Children</b>								
Children in Household	37%	37%	36%	35%	45%	28%	31%	43%
Children 0-5	18%	18%	18%	14%	27%	9%	12%	21%
Children 6-12	18%	18%	18%	19%	21%	18%	15%	19%
Children 13-17	15%	14%	14%	13%	14%	10%	14%	15%
<b>Education</b>								
Some College (no degree)	22%	22%	26%	30%	29%	30%	25%	30%
Associate Degree	11%	12%	10%	10%	10%	10%	9%	10%
Bachelor Degree or Higher	54%	53%	46%	40%	40%	38%	50%	43%

**Oklahoma visitors tend to be somewhat older than visitors to competitor states and tend to have a lower household income.**

Demographics	Oklahoma Visitors CY 2018	Arkansas Visitors CY 2018	Kansas Visitors CY 2018	Missouri Visitors CY 2018	Texas Visitors CY 2018
Average Age	50.2	43.8	47.5	47.5	45.1
Average Household Income	\$72,800	\$76,100	\$86,200	\$83,000	\$82,9000
Male	35%	39%	42%	43%	37%
Married	61%	63%	63%	68%	63%
In-State Visitor	53%	52%	46%	45%	75%
Children in Household	35%	49%	36%	36%	44%
Household Composition					
One Person	15%	14%	17%	12%	14%
Two People	43%	33%	39%	43%	35%
Three or More	42%	53%	44%	45%	51%
Race					
Caucasian	88%	87%	89%	94%	84%
African-American	3%	7%	3%	2%	6%
Asian/Pacific Islander	2%	2%	2%	1%	5%
American Indian/Aleut Eskimo	5%	3%	5%	1%	1%
Other	2%	2%	1%	1%	4%
Ethnicity					
Hispanic Origin	4%	4%	4%	3%	12%

**12  
Glossary &  
Methodology**



# Glossary

Term	Definition
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 state or 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 2018.

## Activity Category Definitions

<b>Festivals/Rodeo/State Fair/Theme Parks/Zoos</b>	Rodeo/State fair, Special events/Festivals (e.g. Mardi Gras, hot air balloons, etc.), Theme park/Amusement park/Water park, Zoos/Aquariums/Aviaries
<b>Nature/Outdoor Activities</b>	Beach, Bird watching, Camping, Caverns, Farms/Ranches/Agri-tours, Gardens, Hiking/Backpacking/Canyoneering, Nature travel/ecotouring, Other nature (photography, rockhound, etc.), Wildlife viewing
<b>Entertainment/Amusement</b>	Casino/gaming, Fine dining, Nightclub/dancing
<b>Family/Friend Activities &amp; Reunions</b>	Family reunion, High school/College reunion, Visiting family, Visiting friends
<b>Art &amp; Culture</b>	Art galleries, Museums, Musical performance/show, Musical theater, Native American ruins/Rock art, Symphony/Opera/Concert, Theater/Drama
<b>Sightseeing &amp; Shopping</b>	Area where a TV show or movie was filmed, Historic sites/churches, Local/Folk arts/crafts, Old homes/mansions, Shopping, Rural sightseeing, Urban sightseeing
<b>Sports &amp; Recreation</b>	Biking/Road biking/Cycling, Fishing, Golf, Horseback riding, Horseracing, Hunting, Motor sports (NASCAR/Indy), Sailing, Spa/Health club, Motor boat/Jet ski, Mountain biking, Sports events – Major/Professional, Sports events – Youth/Amateur/Collegiate (spectator), Sports events – Youth/Amateur/Collegiate (participant)
<b>Adventure Sports</b>	ATV/Four-wheeling, Hang gliding/Skydiving/Base jumping, Rock/Mountain climbing, Scuba diving/Snorkeling, Snowmobiling, Skiing/Snowboarding, Snow sports other than skiing or snowmobiling, Whitewater rafting/Kayaking/Canoeing/Paddleboarding
<b>Parks</b>	State park/Monuments/Recreation areas, National park/Monuments/Recreation areas
<b>Breweries/Distilleries/Wineries</b>	Craft breweries, Distilleries, Wine tasting/Winery tour

## Research Methods

### Data Collection Process

- OmniTrak Group uses its U.S. panel to manage sample for TravelTrakAmerica
- 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 Years

	CY 2017		CY 2018	
	Unweighted Respondents	Weighted Respondents	Unweighted Respondents	Weighted Respondents
Oklahoma Residents	1,414	1,263	1,357	1,333
Oklahoma Visitors (Trips)	867	797	932	996
Total for TravelsAmerica	43,907	41,763	43,907	42,253

# Thank you

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