



CY 2022 Oklahoma Visitor Profile & Insights Report

Prepared for the Oklahoma Tourism and Recreation Department | July 2023



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KEY TAKEAWAYS



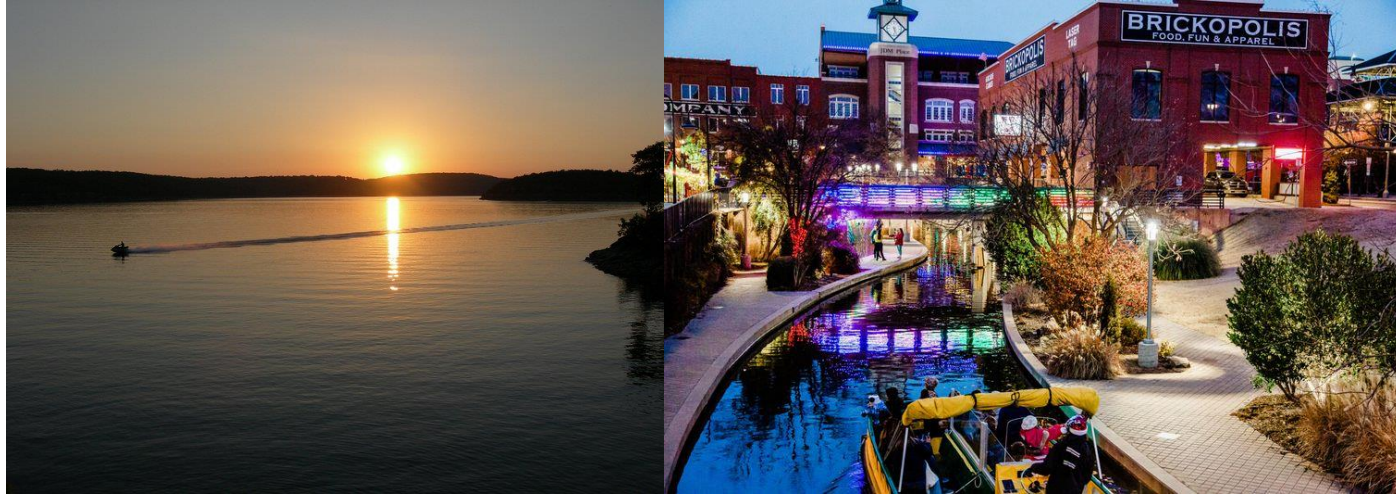
Key Takeaways

1. **Oklahoma visitor volume continues an upward trajectory in 2022.** During CY 2022, Oklahoma welcomed 18.3 million visitors, a 3.3% increase in visitation over the previous year. Growth in visitation to the state during CY 2022 outpaced domestic travel overall, which did not have a year-over-year increase. Despite this growth in visitor volume, travel intent fell to pre-pandemic levels, suggesting the period of pent-up travel demand due to COVID-19 is over.
2. **Oklahoma visitor spending grew at a faster rate than nearly all its regional competitors in 2022.** Only Texas (+14%) saw a larger year-over-year increase in travel party spend among its visitors than Oklahoma (+12%). Visitor spending increases in Oklahoma can be attributed to a higher proportion of out-of-state visitors than the previous year. They take more overnight trips than their in-state counterparts and they stay longer on their trips, resulting in more money spent while on their trip.
3. **While gaming opportunities in Oklahoma attract the state's most lucrative visitors, Arts & Culture looks to be another attractive visitor segment.** Casinos/gaming was the most popular activity for out-of-state visitors in 2022. These visitors also represented the second-largest niche activity segment (29%) and spent more than any other niche segment (\$872). The Arts & Culture segment spent the second-most, at \$806 per travel party. While the share of visitors in this segment is only 14%, it is +3 pts higher than the previous year, suggesting potential growth opportunity. Oklahoma could look to focus its efforts by targeting culture-driven travelers who are seeking out historic sites and museums.

INTRODUCTION & OVERVIEW



Introduction



Omnitrak's Travel and Leisure Division is fueled by a scrappy team of travel research professionals who are passionate about destination research and thrive on a "Perfect Storm" of Creativity, Geekiness and Storytelling. Omnitrak works with some of North America's largest tourism offices who subscribe to the company's TravelTrakAmerica study of U.S. travelers with an annual sample exceeding 108,000.

This Oklahoma Visitor Profile & Insights report provides intelligence on U.S. domestic travelers and Oklahoma travel trends for Calendar Year 2022. The 2022 Oklahoma visitor profile is based on a weighted sample of 818 household trips.

This report has been produced for Oklahoma Tourism & Recreation (OTRD) with quarterly and annual data continuously extracted from the TravelTrakAmerica syndicated dataset. The CY 2022 report is the 9th report generated for OTRD.

Overview



Visitor Type

Information is provided on total U.S. Domestic and Oklahoma visitors along with Oklahoma visitors segments. These segments include in-state, out-of-state, day, overnight, leisure, and business.

Visitor Profile

Visitor Characteristics: Source markets (state/DMA) and demographics (age, children, employment, income, etc.)

Trip Characteristics: Spending in Oklahoma, length of stay, travel party, activities (including value by niche activity), transportation, travel timing & planning, and quarterly travel trends

Benefits

Niche Activity Visitor Segments: Understand niche visitor segments generating the highest yield within the state

Competitive Analysis: Comparison of visitors to competitor states (Arkansas, Kansas, Missouri, and Texas) on market share, intent to visit, length of stay, satisfaction, spending, demographics, etc.

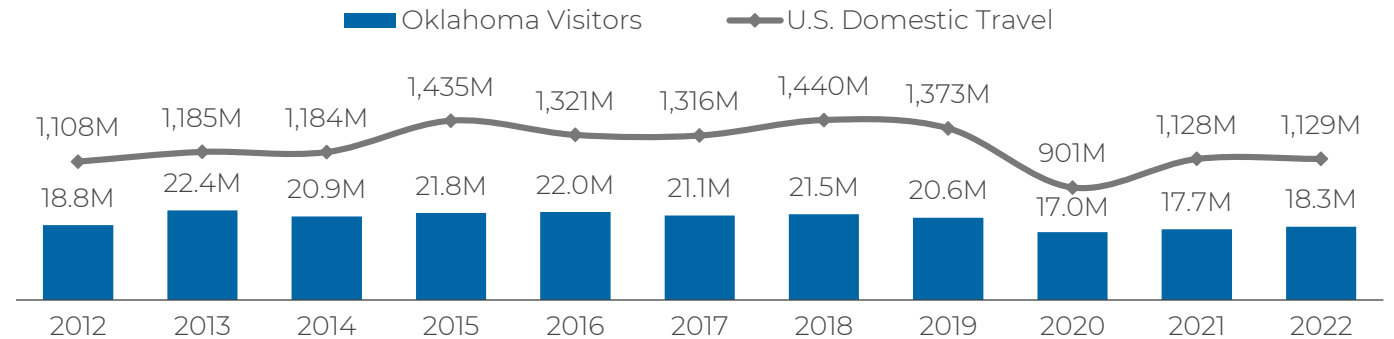
EXECUTIVE SUMMARY



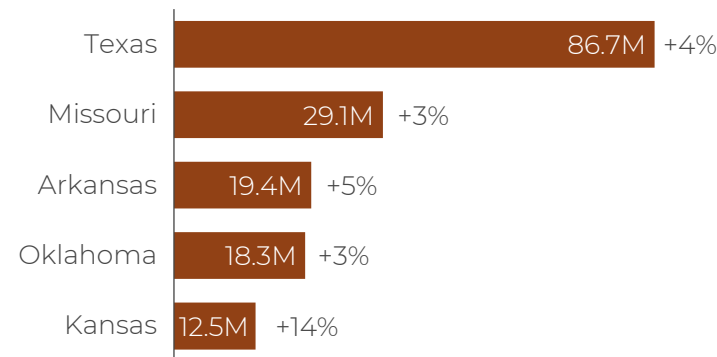
Oklahoma visitor volume continues an upward trajectory

- Oklahoma's visitor volume grew to 18.3M million during CY 2022, up from 17.7M in the previous year. During this period, Oklahoma visitation increased by 3.3%, while domestic travel within the U.S. plateaued.
- In-state visitation declined by -14%, representing only 37% of total Oklahoma visitation.
- 11.5M out-of-state residents traveled to the state, a +17% increase compared to the previous year.
- All of Oklahoma's regional competitors had a spike in visitor volume in CY 2022, with Kansas having the largest boost at +14%.

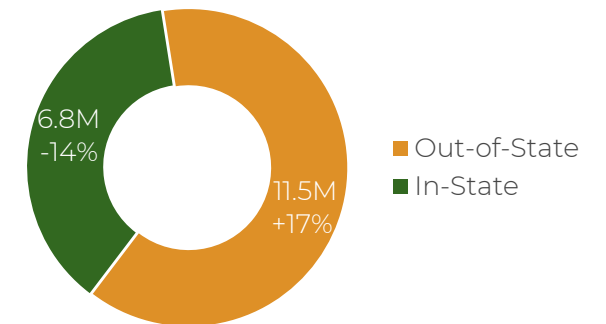
Domestic Travel Trends within U.S. and Oklahoma



Oklahoma vs Regional Competitors

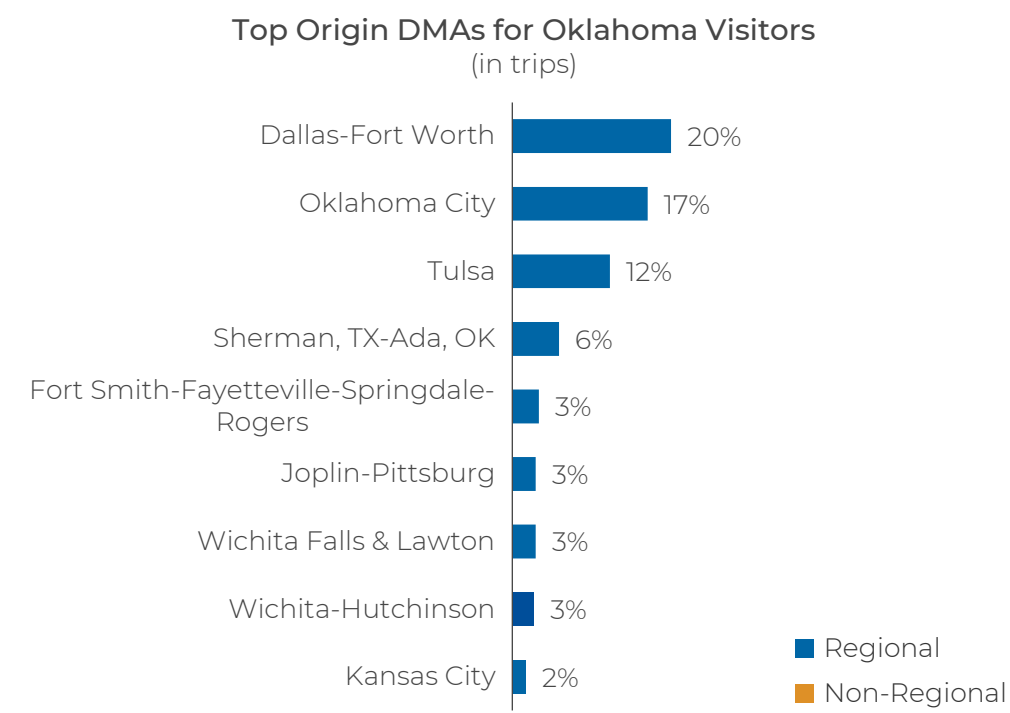
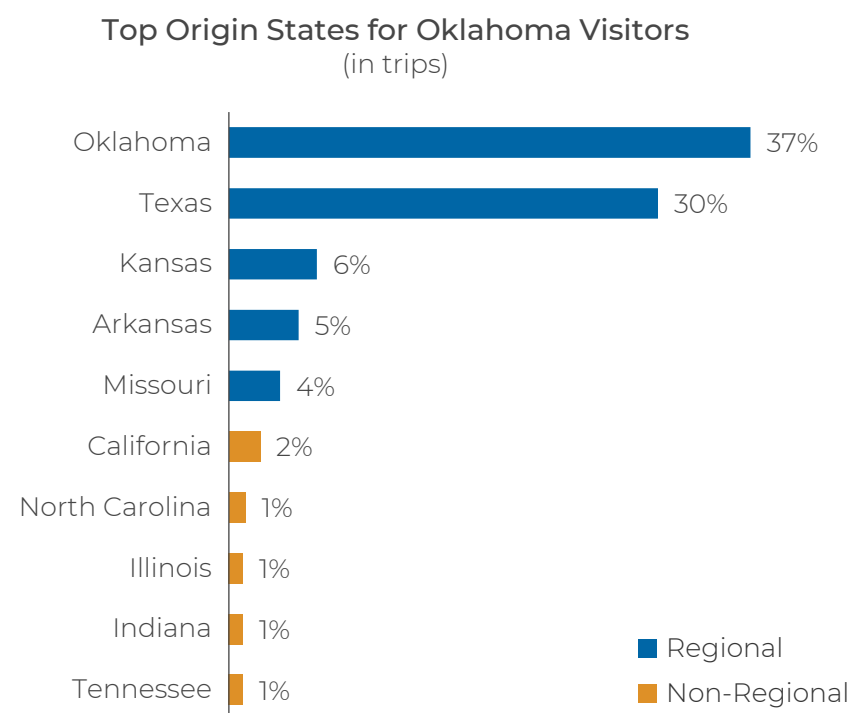


Oklahoma In-State vs Out-of-State Visitors



Proximity influences where visitors travel from

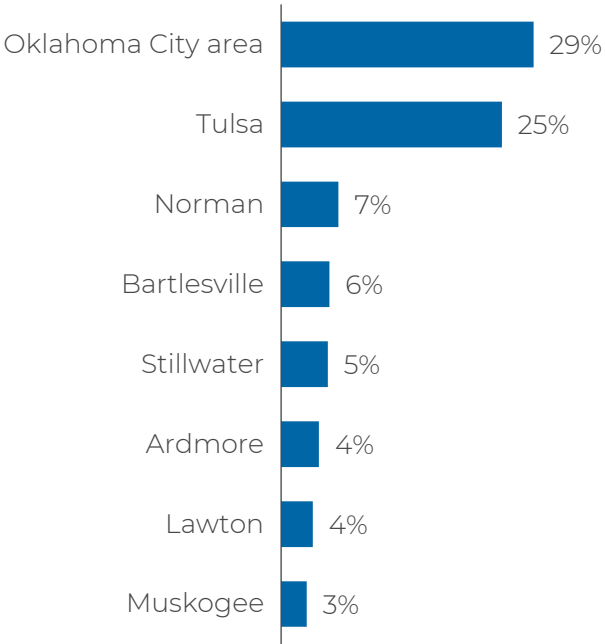
- Four out of five trips made to Oklahoma were either by residents living within the state or a neighboring regional state in 2022. Oklahoma itself was the top source for trips to/within the state, contributing to 37% of total trips. Notably, nearly half (45%) of Oklahoma trips are travelers from neighboring regional states – a high potential source of higher-spending visitors.
- Dallas-Fort Worth overtook Oklahoma City as the top origin market for Oklahoma trips in 2022 (20% vs 17%).



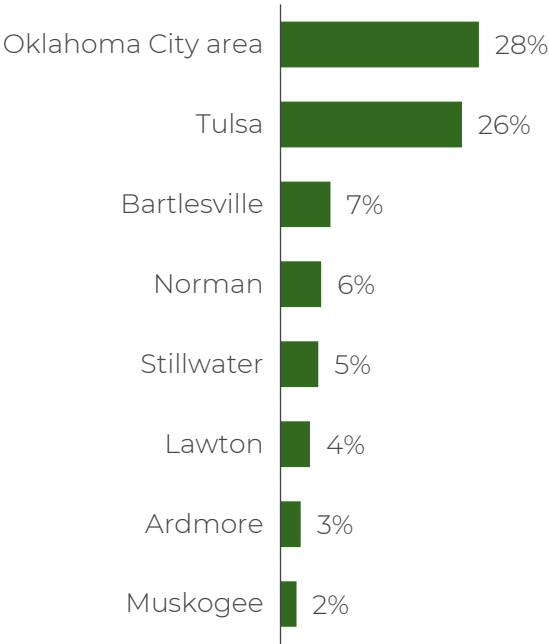
Proximity also influences where visitors travel to

- Travelers visiting Oklahoma are drawn to the state's largest cities including Oklahoma City and Tulsa.
- Among the less-visited cities within Oklahoma, Norman and Bartlesville were the most frequented destinations.

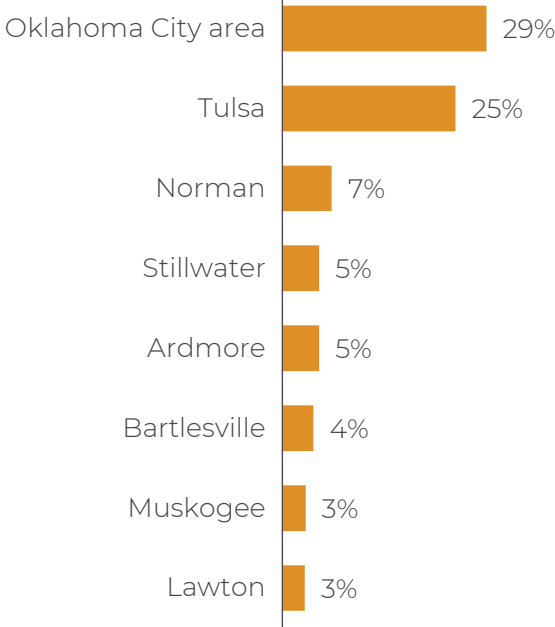
Top Oklahoma Destinations



Top Oklahoma Destinations for In-State Visitors



Top Oklahoma Destinations for Out-of-State Visitors

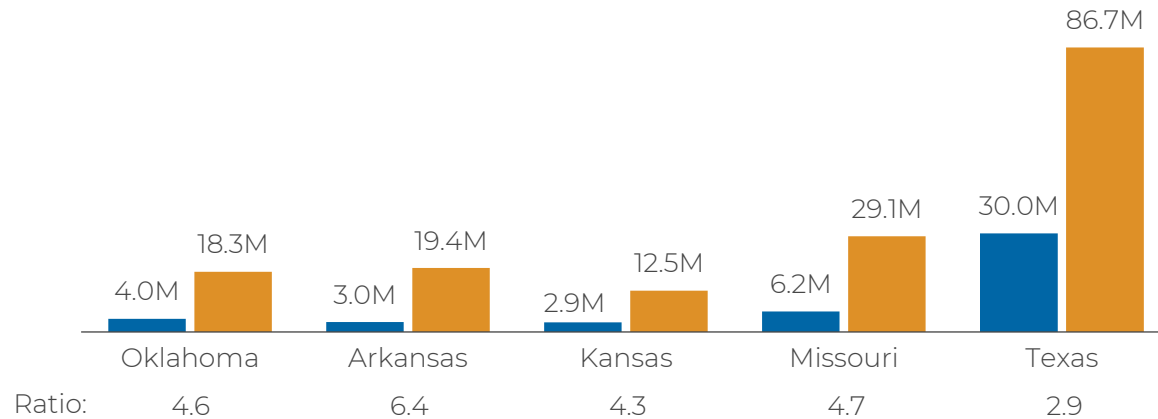


Tourism generates revenue for Oklahoma

- The ratio of visitors an area receives relative to its resident population can be used as a tool to help gauge tourism's relevance and function as an indicator of “over tourism”. As the ratio rises, increased focus should be placed on growing responsible travel.
- With a ratio of 4.6 visitors per resident, Oklahoma lands in the middle of its neighboring competitors.

Visitors vs. Population

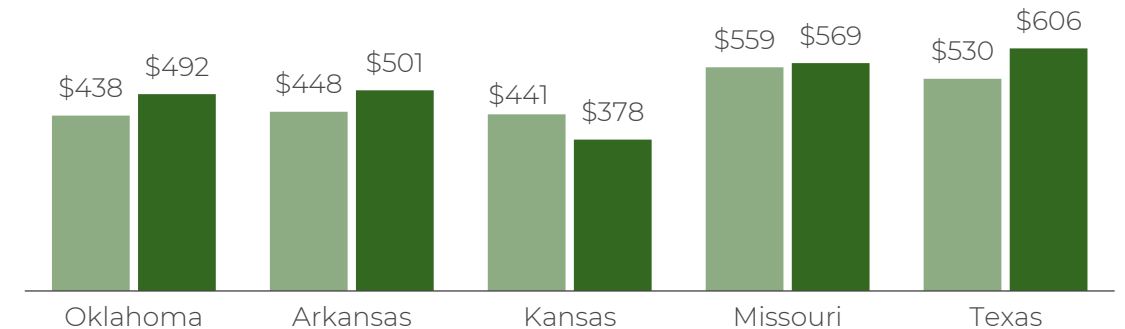
■ Population ■ Visitors



- States, cities and local areas benefit financially from the tourism industry. Tourism not only generates revenue directly for industry businesses that employ residents, but it also produces revenue in the form of taxes.
- Oklahoma had the second-largest travel party spend year-over-year increase, behind Texas, with visitors spending an average of \$492 in 2022.

Average Travel Party Spend Within Destination

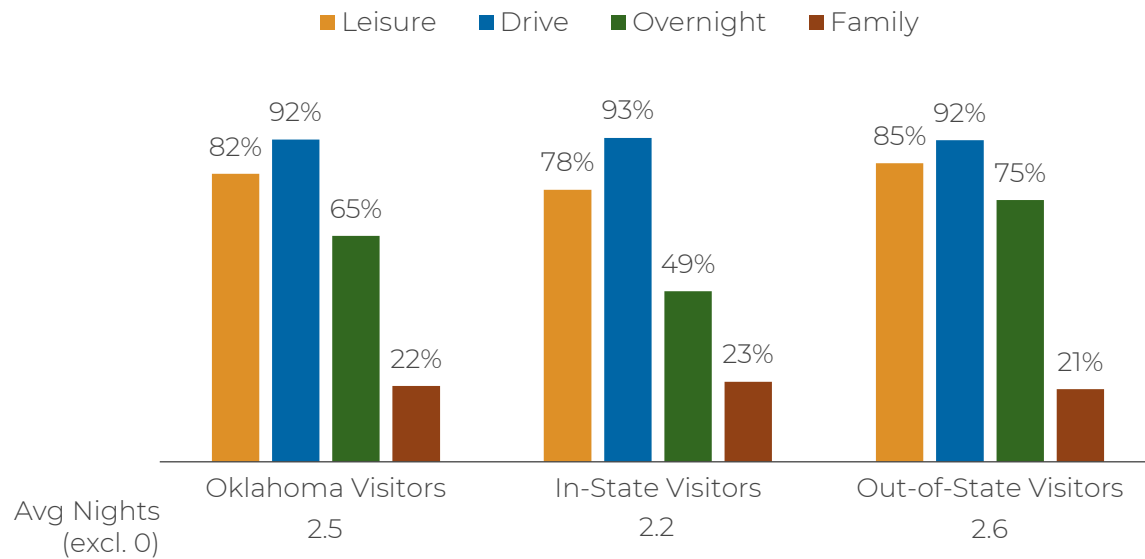
■ CY 2021 ■ CY 2022



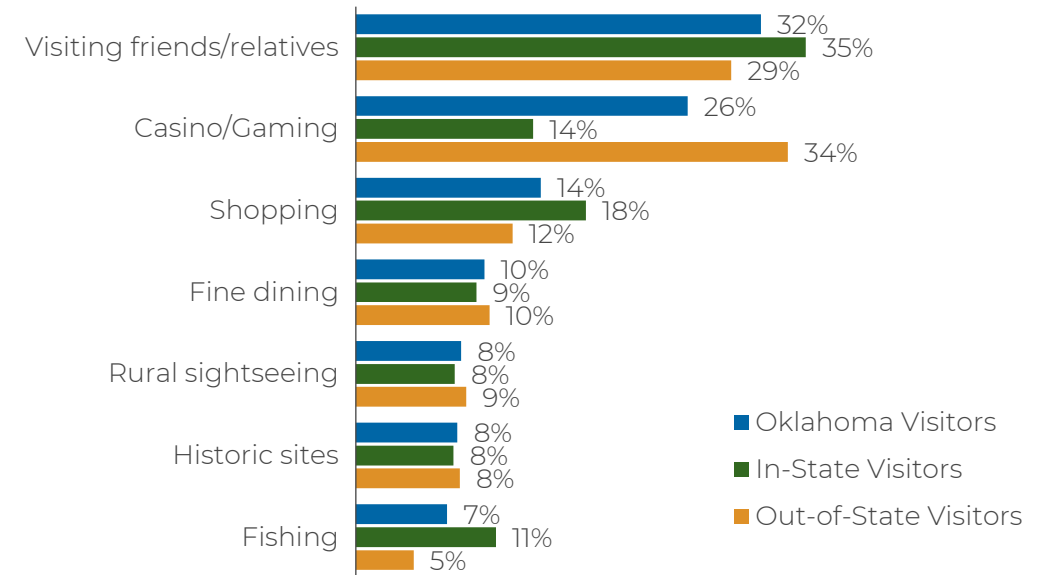
Most travelers visit Oklahoma for leisure, drive, and stay overnight

- Leisure travel continued to dominate Oklahoma's tourism industry in CY 2022, particularly among out-of-state visitors.
- Oklahoma's out-of-state visitors were more likely to stay overnight than in-state visitors (75% vs 49%).
- Visiting friends/relatives was the most popular activity among in-state visitors, while casino/gaming had the highest activity participation rate among out-of-state visitors.

Trip Purpose, Drive* Visits, Overnight Stays, and Family Travel

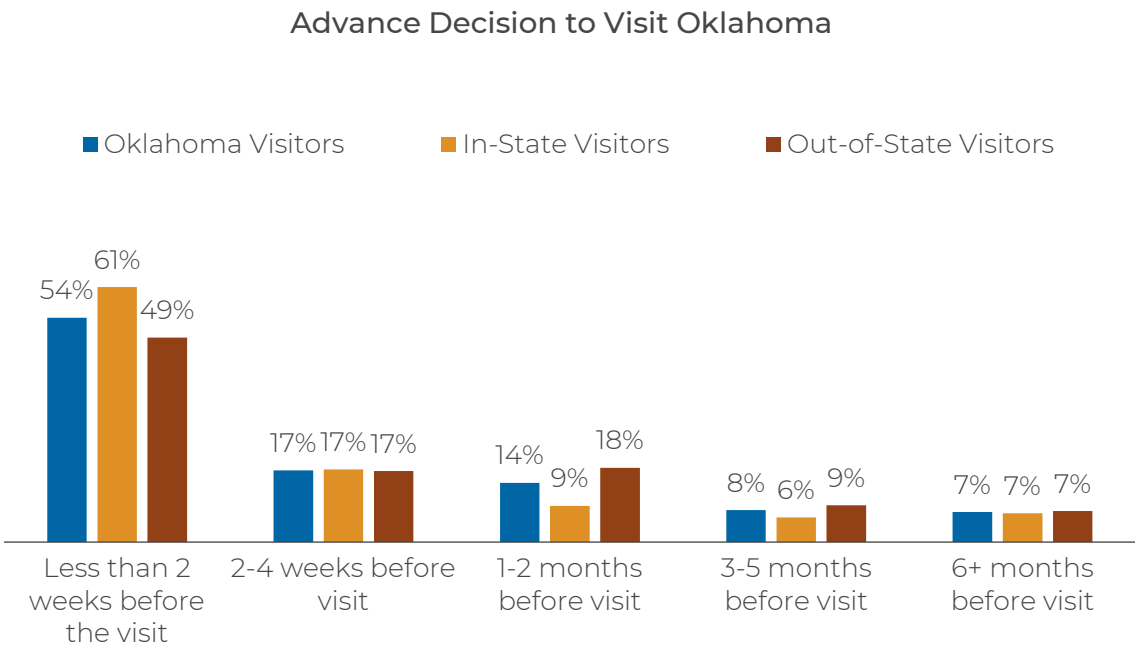


Top Oklahoma Activities**



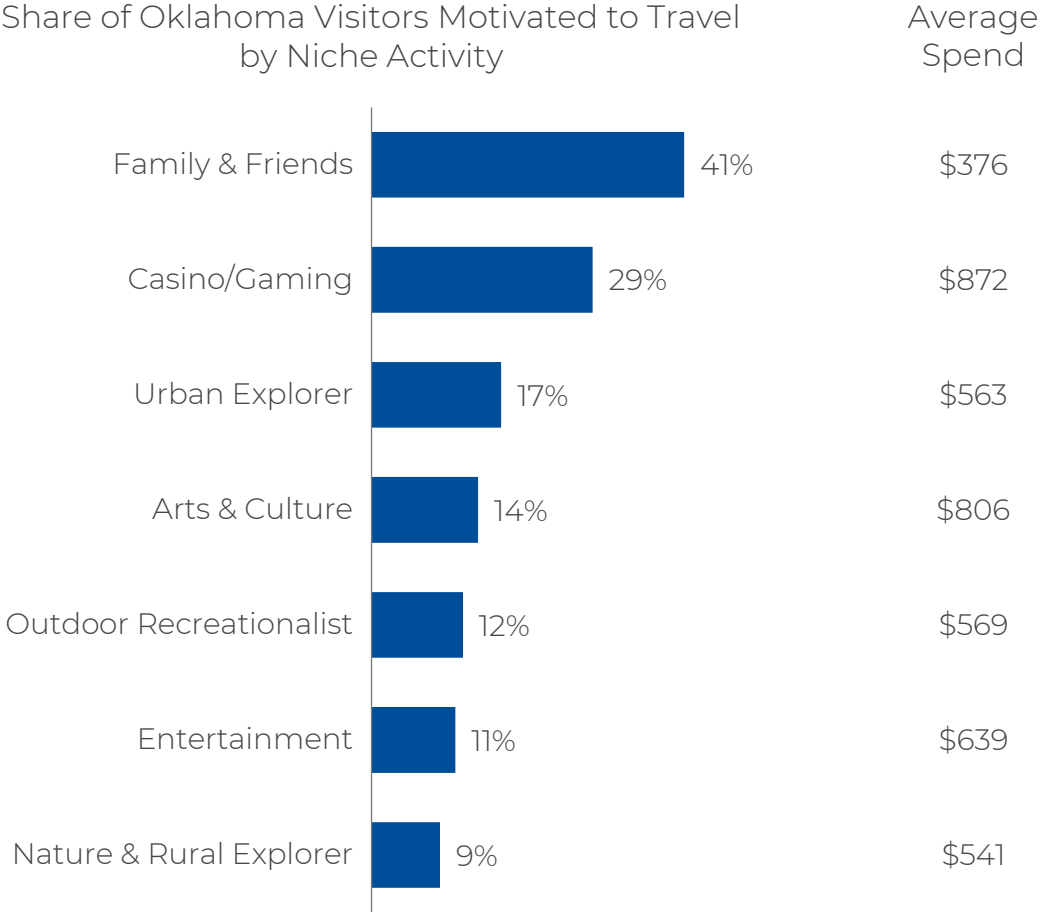
Distance impacts Oklahoma visitors timing of travel decisions and the sources they use when planning travel

- While nearly half (49%) of out-of-state visitors decided on their trip less than 2 weeks before traveling, 61% of in-state travelers decided during the same timeframe.
- Out-of-state travelers were more likely to rely on search engines and destination websites, while in-state visitors went to friends/relatives more often to plan their trip.



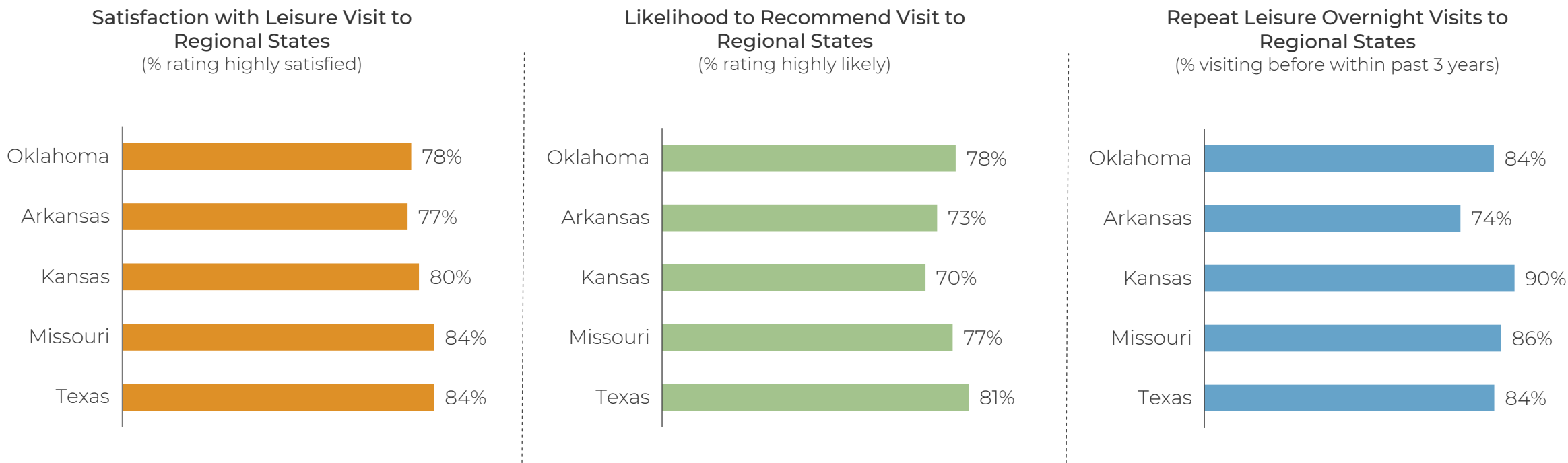
Niche activities motivate travel and generate spend

- Travelers who are motivated to visit Oklahoma for niche activities provide value by contributing to total spending in the state.
- Oklahoma's most lucrative niche activity segment is the Casino/Gaming niche. Visitors in this segment not only represented the second-highest portion of Oklahoma's visitors in 2022, but they were also the highest spending. This combination makes them an attractive segment to target.
- Although travelers motivated to visit their friends and family in Oklahoma account for the largest share of the state's visitors, the Friends & Family niche activity segment spent less than all other segments, making them a much less lucrative target.
- The Arts & Culture niche segment was middle of the pack, in terms of share of visitors. However, they were the second-highest spending segment, averaging over \$300 more than overall Oklahoma visitors.



Oklahoma sends leisure visitors home happy, which can help encourage their desire to return

- Satisfaction runs high among leisure visitors to Oklahoma and its neighboring competitors, as nearly four out-of-five Oklahoma visitors reported high satisfaction with their visit. Among regional competitors, Oklahoma had the second-highest proportion of leisure visits who were highly likely to recommend a visit.
- High satisfaction and likelihood to recommend among visitors results in a strong repeat visitor base for Oklahoma.

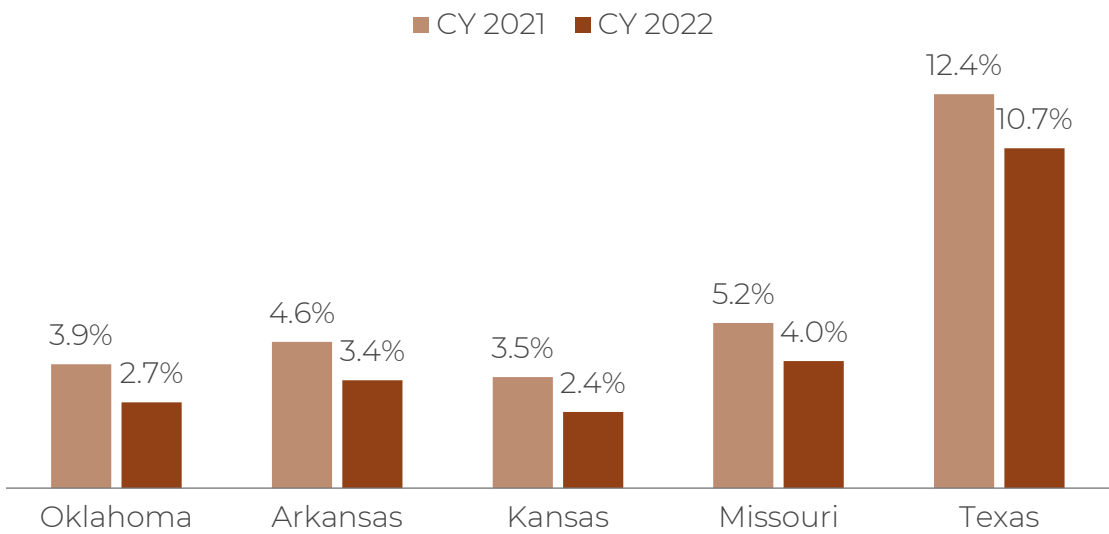


*High satisfaction and high likelihood to recommend rating includes those who have rated their trip satisfaction/likelihood to recommend as 8-10.

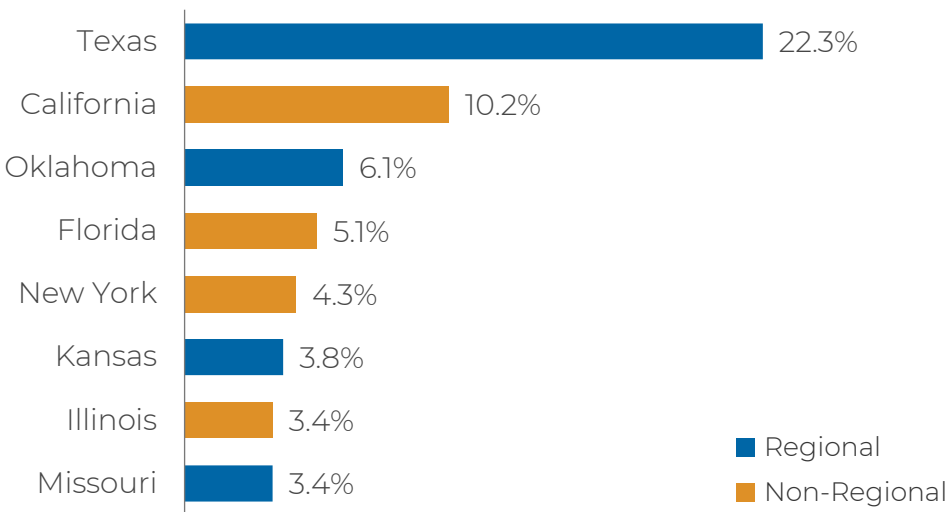
Leisure travel intention decreases for Oklahoma, as well as its competitors

- Year-over-year decreases for intent to visit in the next two years were seen for each state in Oklahoma's competitive set.
- The decline drops Oklahoma to pre-pandemic levels.
- Leisure travel intent to visit Oklahoma is strongest from outside state lines, with Texas residents and California residents making up the largest portions of travelers considering an Oklahoma leisure trip within the next 2 years.

Intent to Visit States within Next Two Years



Top States for Oklahoma Leisure Travel Intent



DETAILED RESULTS



SHARE OF VISITORS

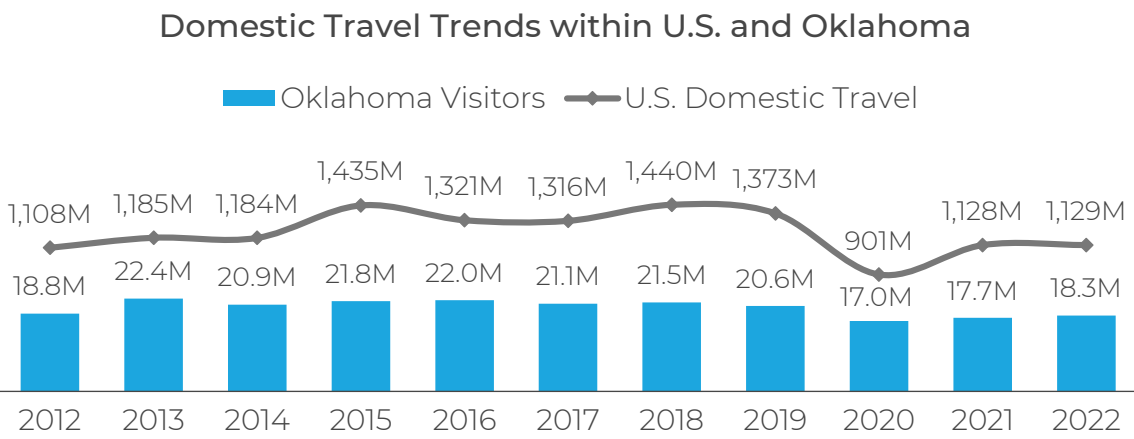


Visitation to Oklahoma increases in 2022

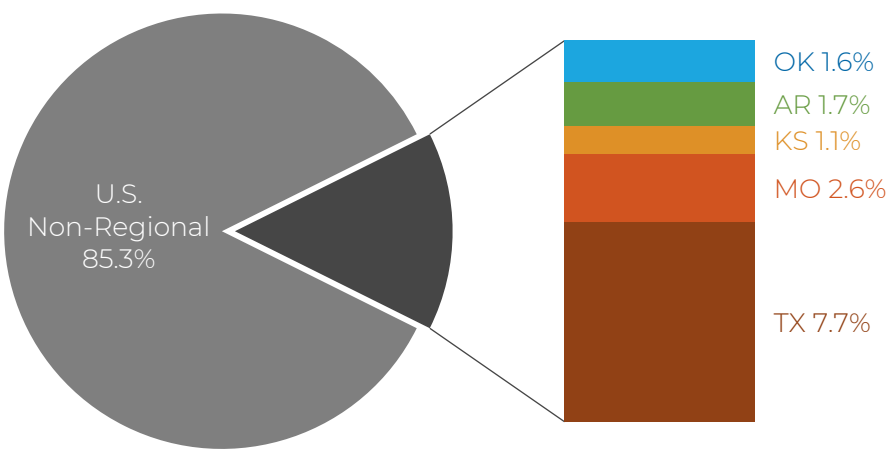
Market Overview:

- Oklahoma hosted 18.3 million travelers in 2022, an increase of 3.3% from the previous year. At the same time, domestic travel within the U.S. plateaued.
- Travel to Oklahoma accounted for 1.6% of total domestic travel within the U.S. during 2022, which is on par with the previous year.

Oklahoma Population Census Estimate	Oklahoma Households Census Estimate	Oklahoma Visitors CY 2022
4,019,800	1,776,666	18.3 million

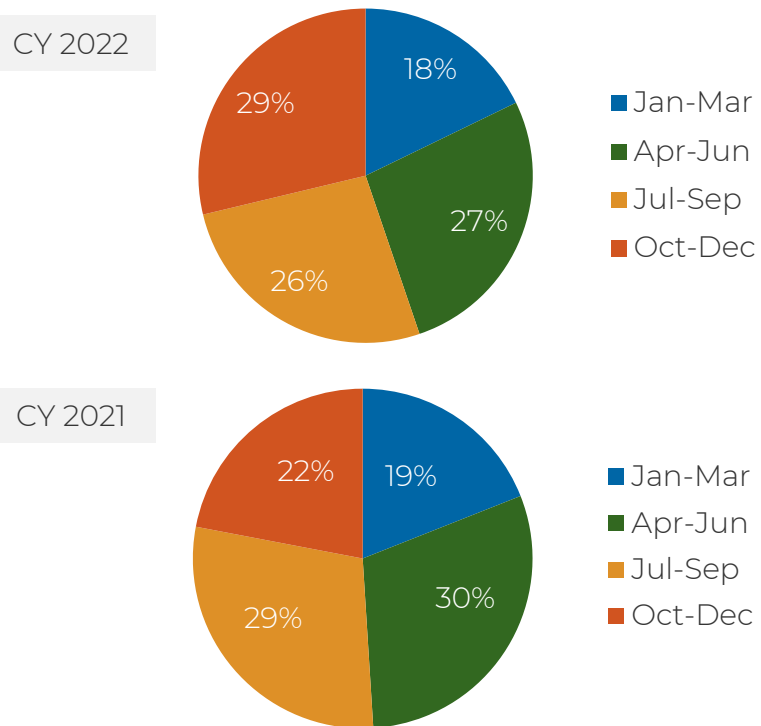


Market Share of U.S. Domestic Travel:
Oklahoma & Competitors

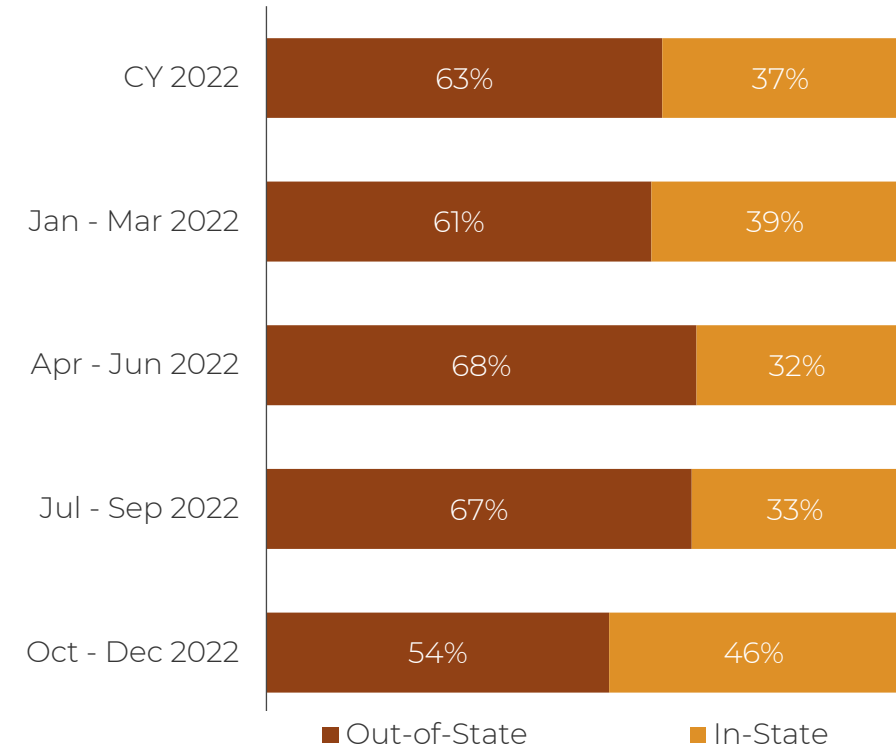


While out-of-state visitation rose in CY 2022, the Q4 travel spike can be attributed to an increase in proportion of in-state travel

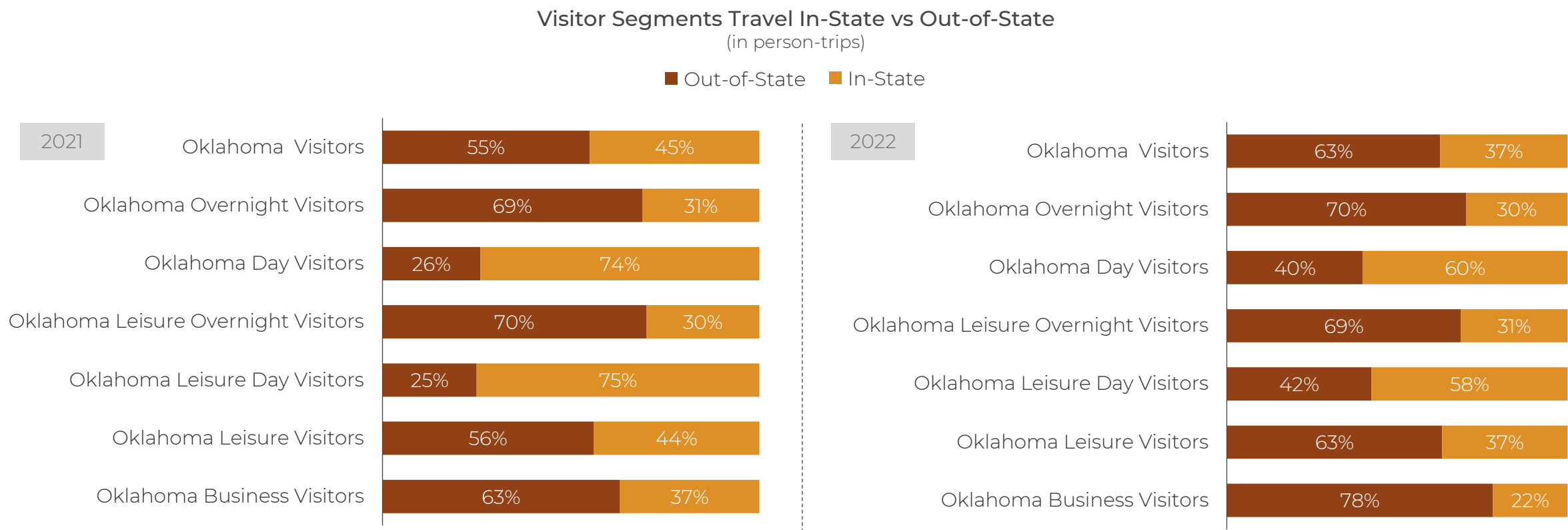
Oklahoma Visitation by Quarter
(in person-trips)



Oklahoma Visitor Source by Quarter
(in person-trips)



Among nearly every travel segment, the proportion of out-of-state visits grew in 2022

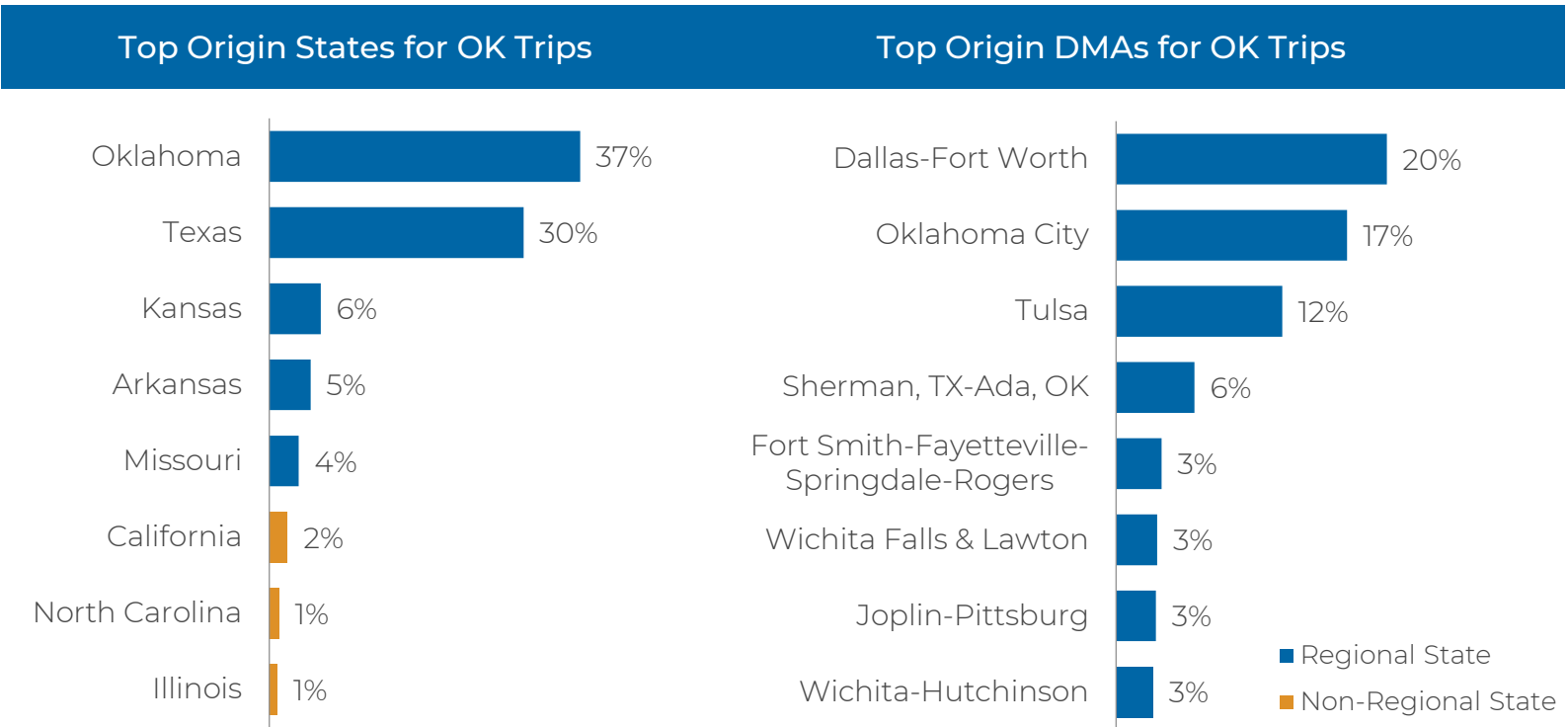


SOURCE MARKETS & TRIP TYPES

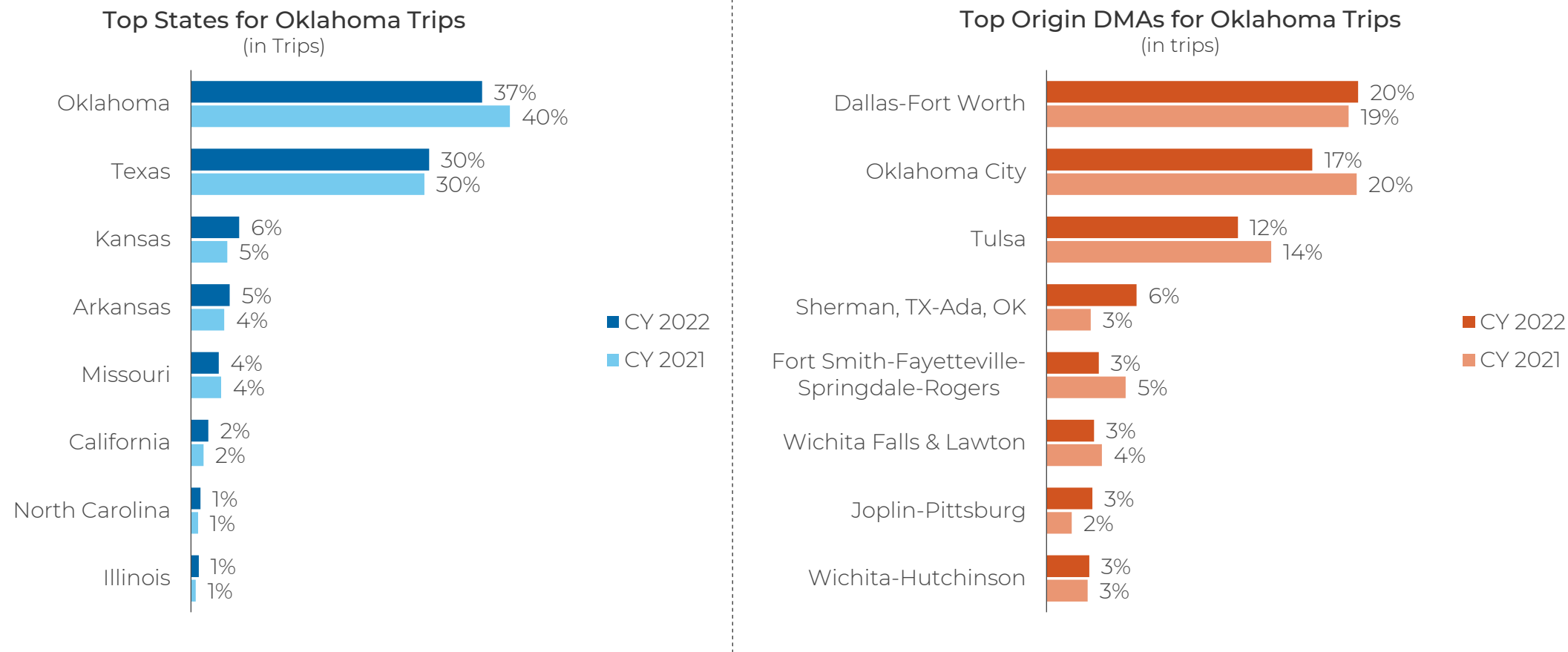


Proximity influences travel, regional states and cities continue to be Oklahoma's dominant origin markets

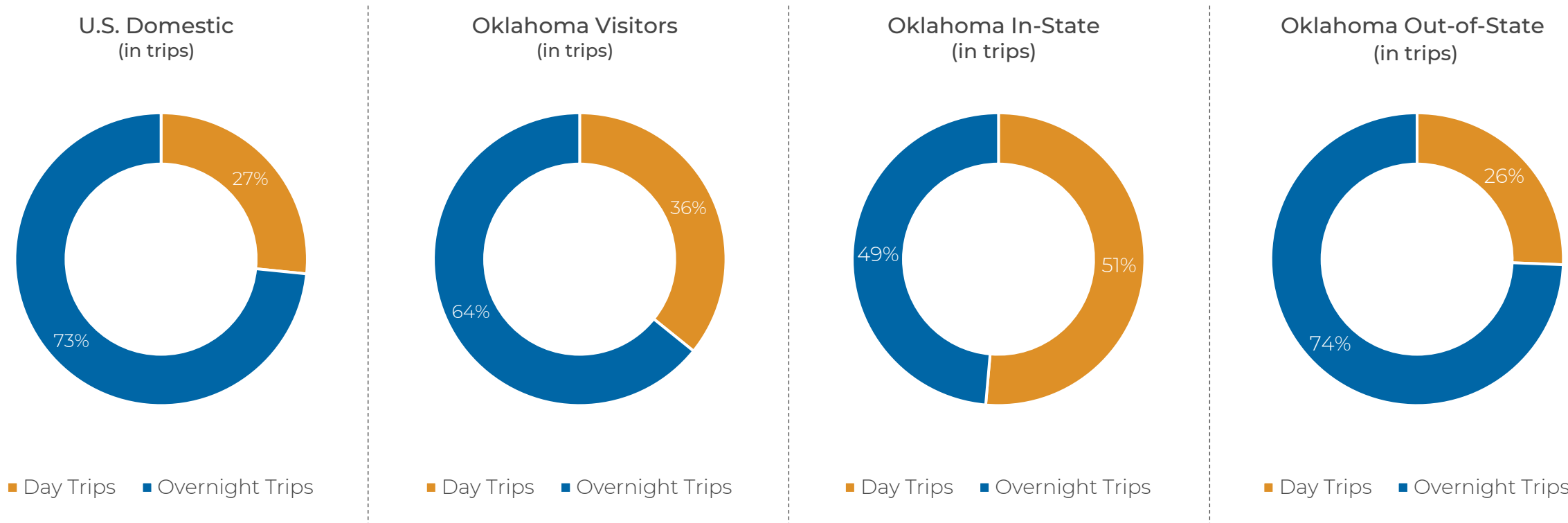
Top Origin Source Markets



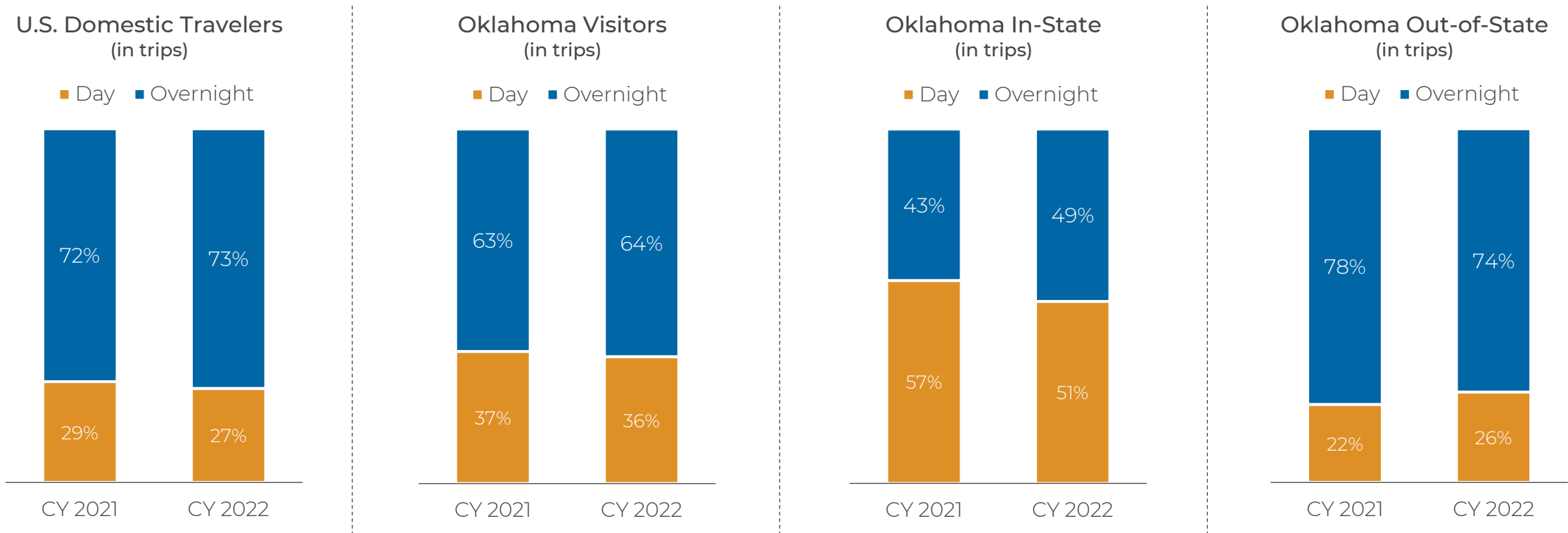
Dallas-Fort Worth overtook Oklahoma City as the top origin market for Oklahoma trips in 2022



Oklahoma visitors were more likely to take a day trip than U.S. domestic travelers in CY 2022



Oklahoma's In-state visitors were more likely to stay overnight in 2022



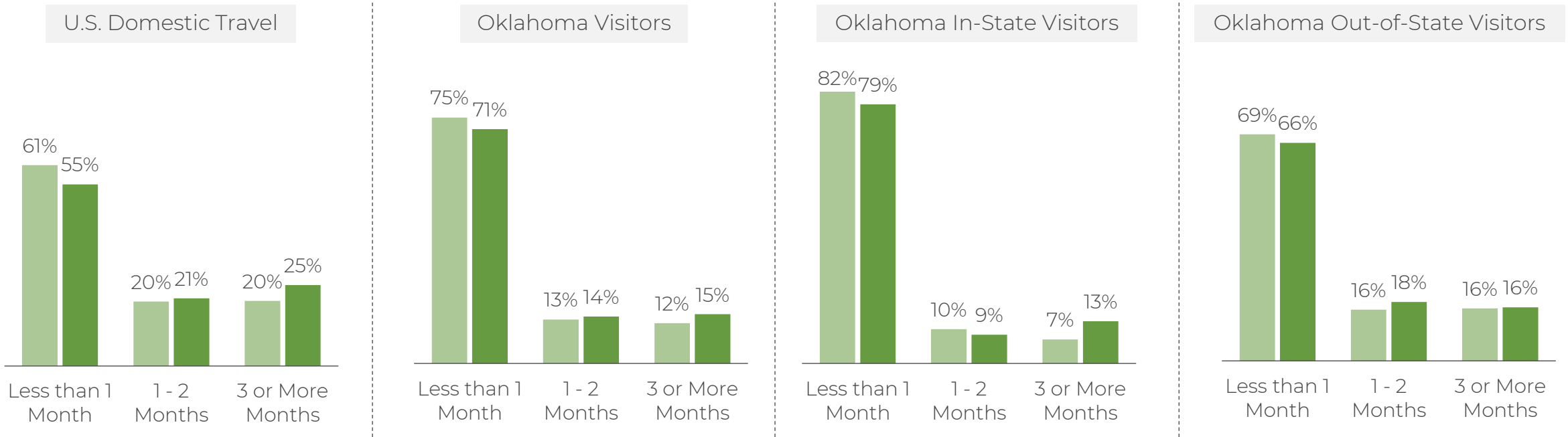
TRAVEL TIMING & PLANNING



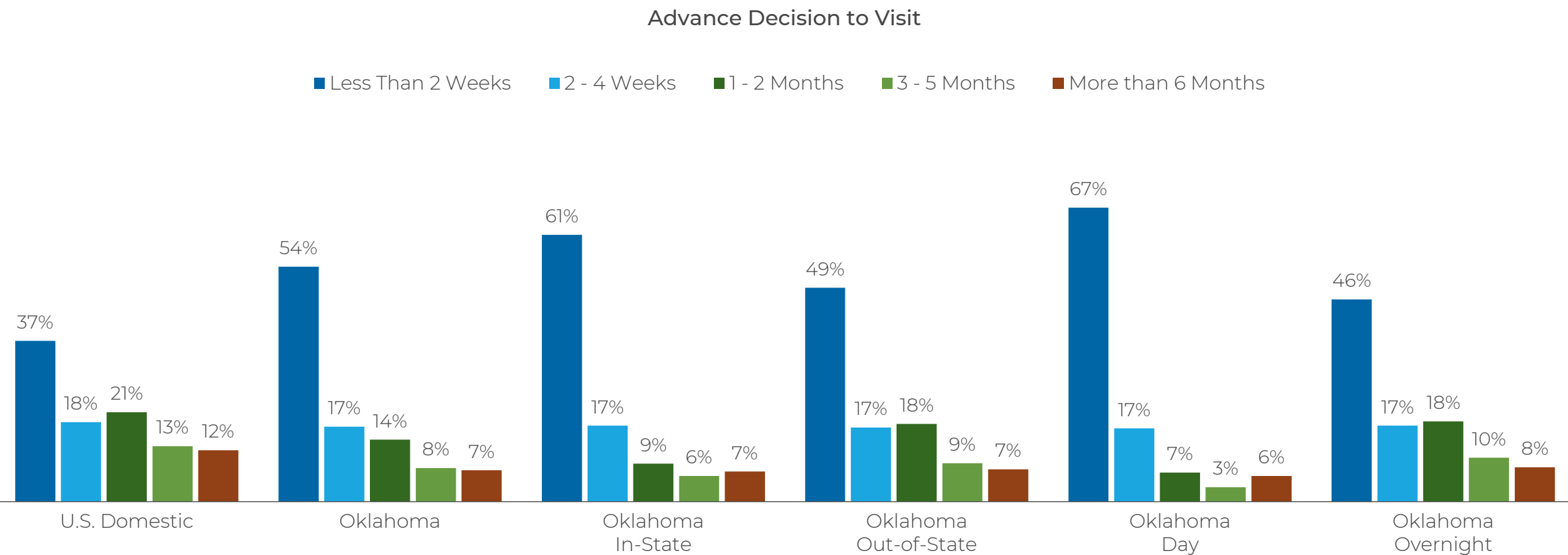
Oklahoma visitors took more time to make their travel decision, compared to the previous year

Advance Trip Decision by Travel Segment

CY 2021 CY 2022



Oklahoma visitors still take less time than domestic travelers with most travel decisions being made within two weeks of traveling



Travel decisions are affected by proximity

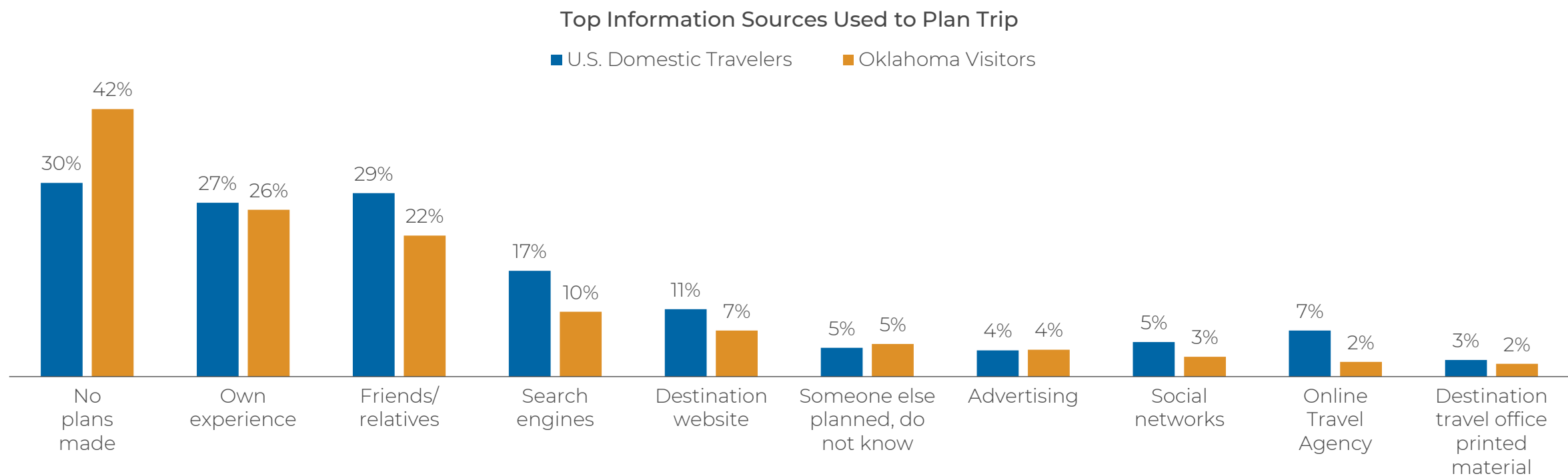
- Domestic trips were slightly more planned out in 2022, resulting in an increase in trips considered and decided on at least a month in advance.
- While Oklahoma visits were also more planned out in 2022, nearly eight out of ten in-state trips (78%) and seven out of ten out-of-state trips (66%) were still decided on less than a month ahead of time.

	U.S. Domestic Travel		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors		Oklahoma Overnight Visitors		Oklahoma Day Visitors	
Trip Decision Timing	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Considered												
Less than 2 weeks before visit	35%	31%	49%	44%	60%	52%	40%	40%	40%	36%	64%	59%
2 – 4 weeks before visit	18%	17%	19%	19%	17%	18%	21%	20%	23%	19%	14%	18%
1 – 2 months before visit	20%	21%	16%	18%	12%	17%	19%	19%	19%	21%	12%	12%
3 – 5 months before visit	13%	15%	9%	9%	6%	7%	11%	11%	11%	11%	4%	6%
6+ months before visit	14%	17%	7%	10%	5%	7%	9%	12%	8%	12%	6%	6%
Decided												
Less than 2 weeks before visit	42%	37%	57%	54%	68%	61%	49%	49%	49%	46%	71%	67%
2 – 4 weeks before visit	19%	18%	17%	17%	14%	17%	20%	17%	21%	17%	11%	17%
1 – 2 months before visit	20%	21%	13%	14%	10%	9%	16%	18%	16%	18%	9%	7%
3 – 5 months before visit	10%	13%	7%	8%	3%	6%	10%	9%	8%	10%	5%	3%
6+ months before visit	9%	12%	5%	7%	4%	7%	6%	7%	6%	8%	5%	6%

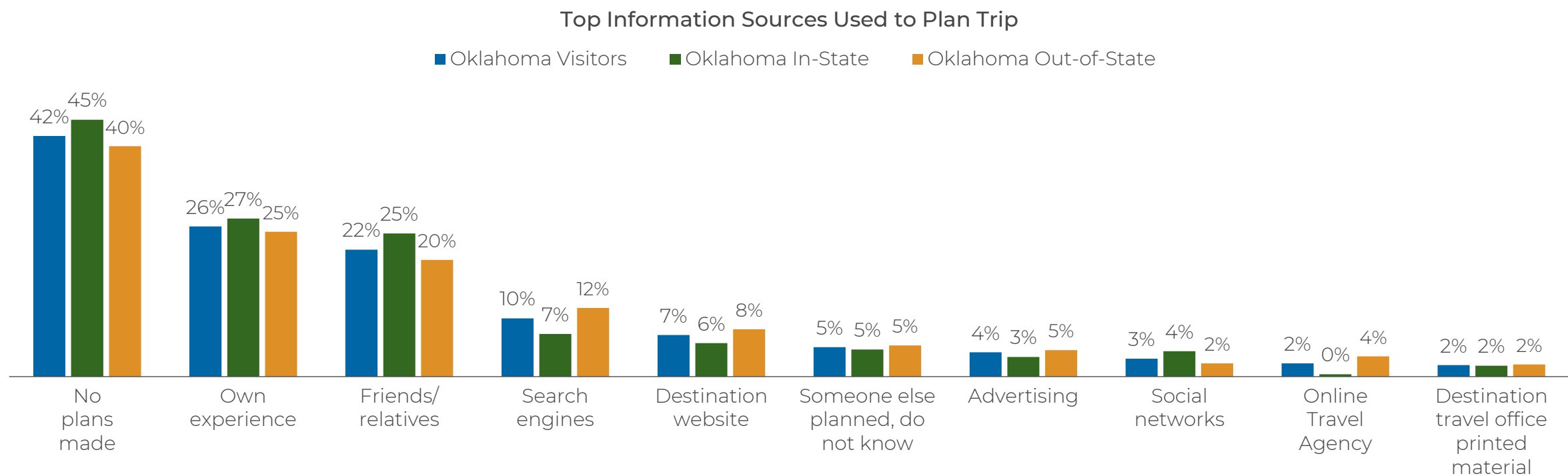
Timing of travel decisions increased for overnight visitors, compared to the previous year

	Oklahoma Out-of-State Overnight Visitors		Oklahoma In-State Overnight Visitors		Oklahoma Leisure Out-of-State Overnight Visitors		Oklahoma Leisure In-State Overnight Visitors	
Trip Decision Timing	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Considered								
Less than 2 weeks before visit	35%	33%	51%	46%	33%	31%	53%	46%
2 – 4 weeks before visit	24%	20%	18%	18%	24%	22%	18%	18%
1 – 2 months before visit	20%	23%	16%	18%	21%	23%	14%	18%
3 – 5 months before visit	11%	12%	11%	10%	13%	12%	12%	11%
6+ months before visit	9%	13%	4%	9%	8%	13%	4%	7%
Decided								
Less than 2 weeks before visit	45%	43%	59%	54%	42%	42%	62%	54%
2 – 4 weeks before visit	23%	17%	17%	18%	23%	17%	14%	19%
1 – 2 months before visit	17%	22%	15%	11%	18%	23%	15%	11%
3 – 5 months before visit	9%	11%	6%	9%	10%	10%	6%	8%
6+ months before visit	7%	8%	3%	9%	7%	7%	3%	7%

Oklahoma travelers are more likely to visit without making plans than domestic travelers

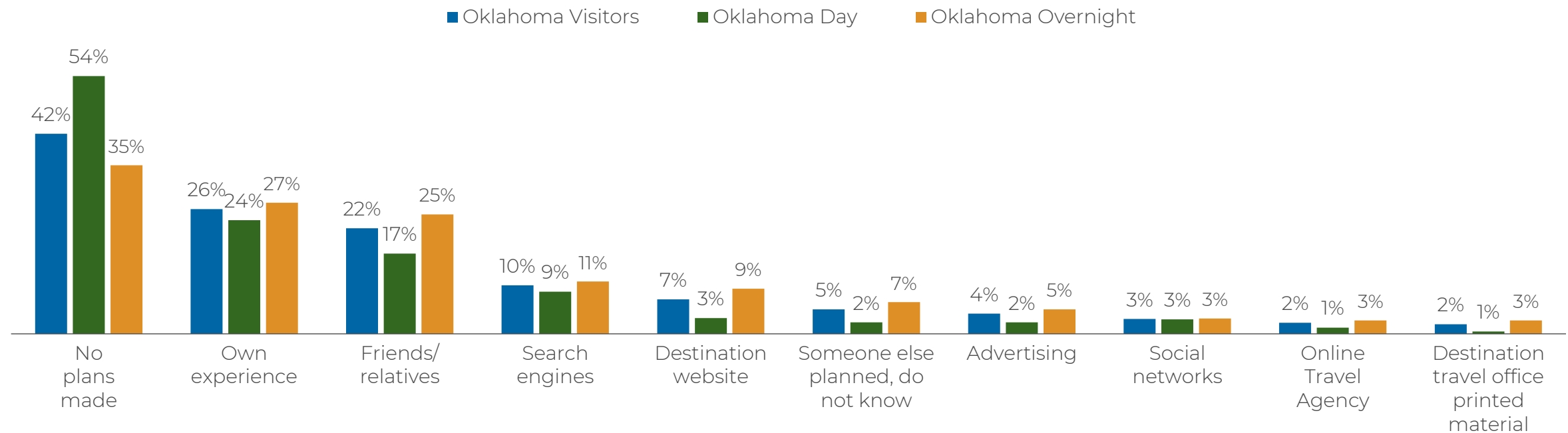


Out-of-state travelers rely more on search engines and destination websites than in-state visitors



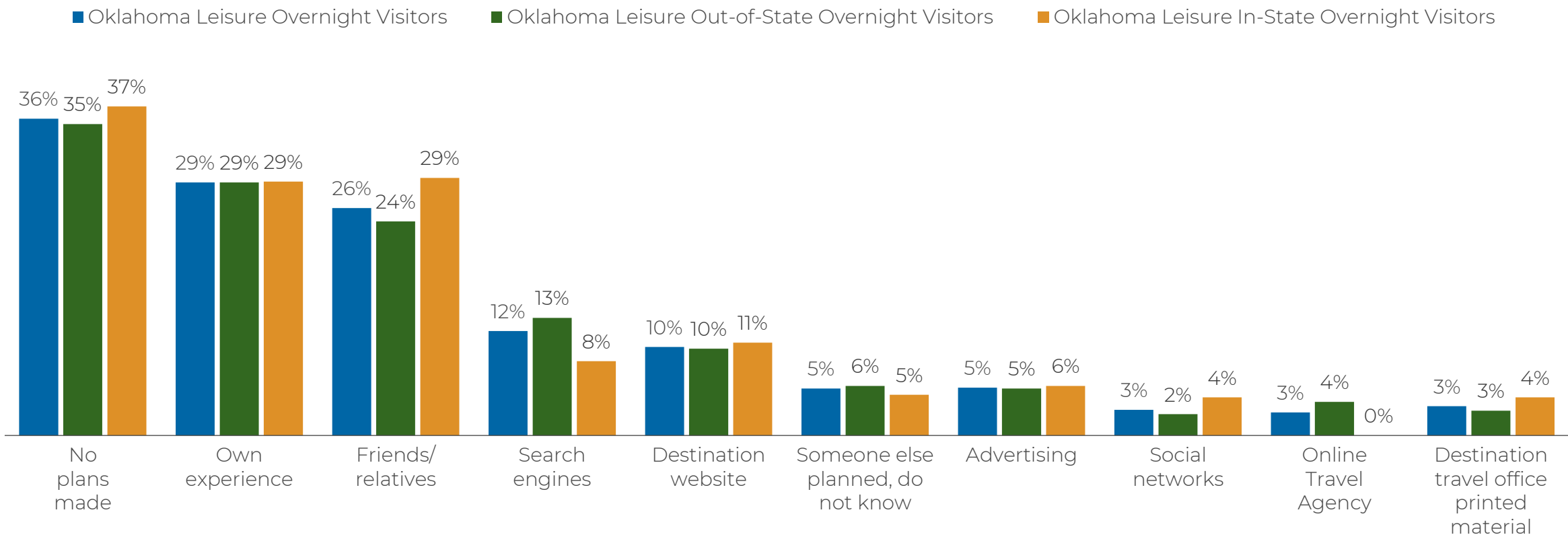
More than half of Oklahoma's day visitors did not make any plans for their trip

Top Information Sources Used to Plan Trip



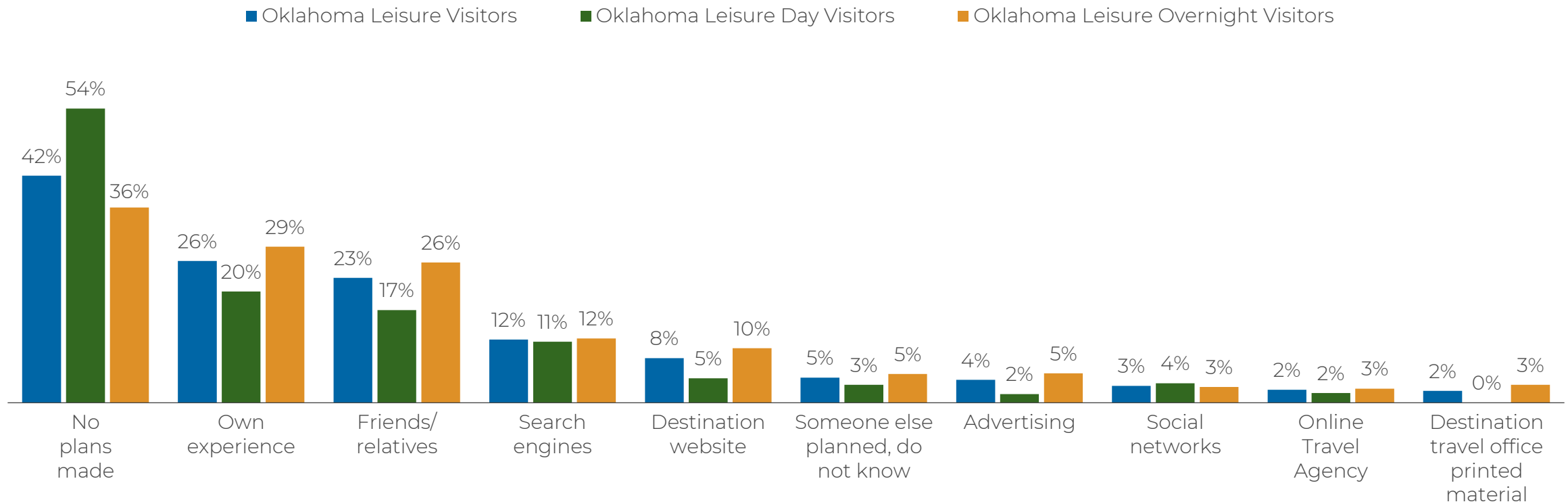
Oklahoma's overnight leisure visitors rely on a variety of trip planning sources

Top Information Sources Used to Plan by Segment

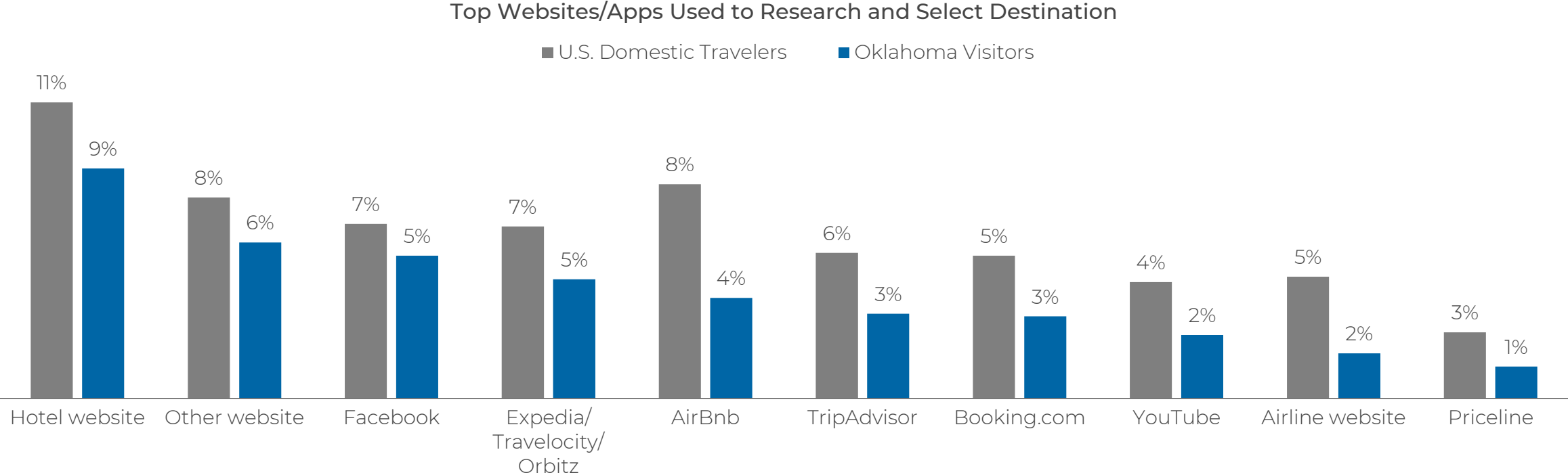


Overnight leisure visitors are most likely to use personal experiences, friends/relatives, and search engines to plan their visit

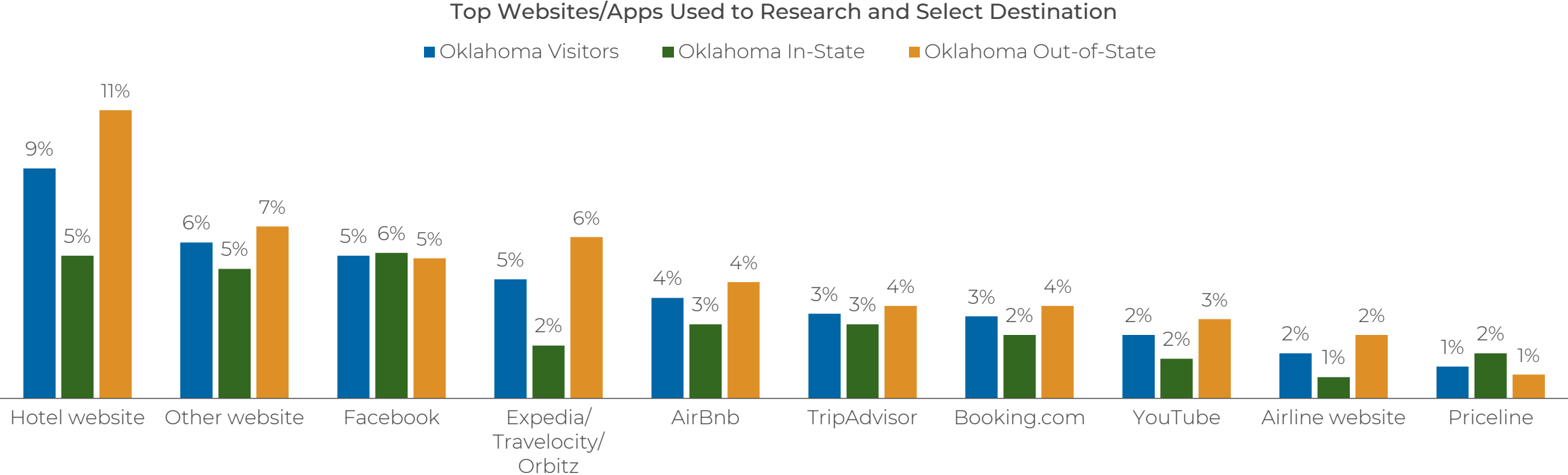
Top Information Sources Used to Plan by Segment



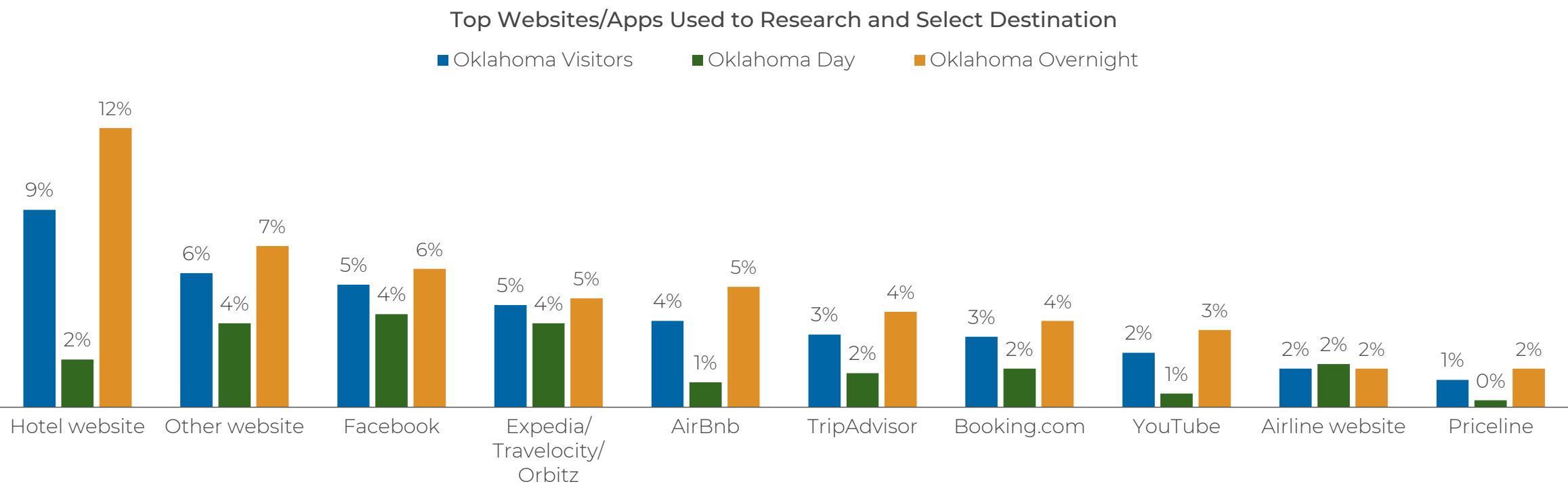
Oklahoma visitors are less likely than overall U.S. domestic travelers to use websites and apps when researching and selecting a destination



Out-of-state visitors rely on more websites/apps than in-state visitors, with top platforms being hotel websites and Expedia/Travelocity/Orbitz



Overnight visitors utilize a wider range of websites and apps than day visitors, including hotel websites and Facebook



TRIP CHARACTERISTICS

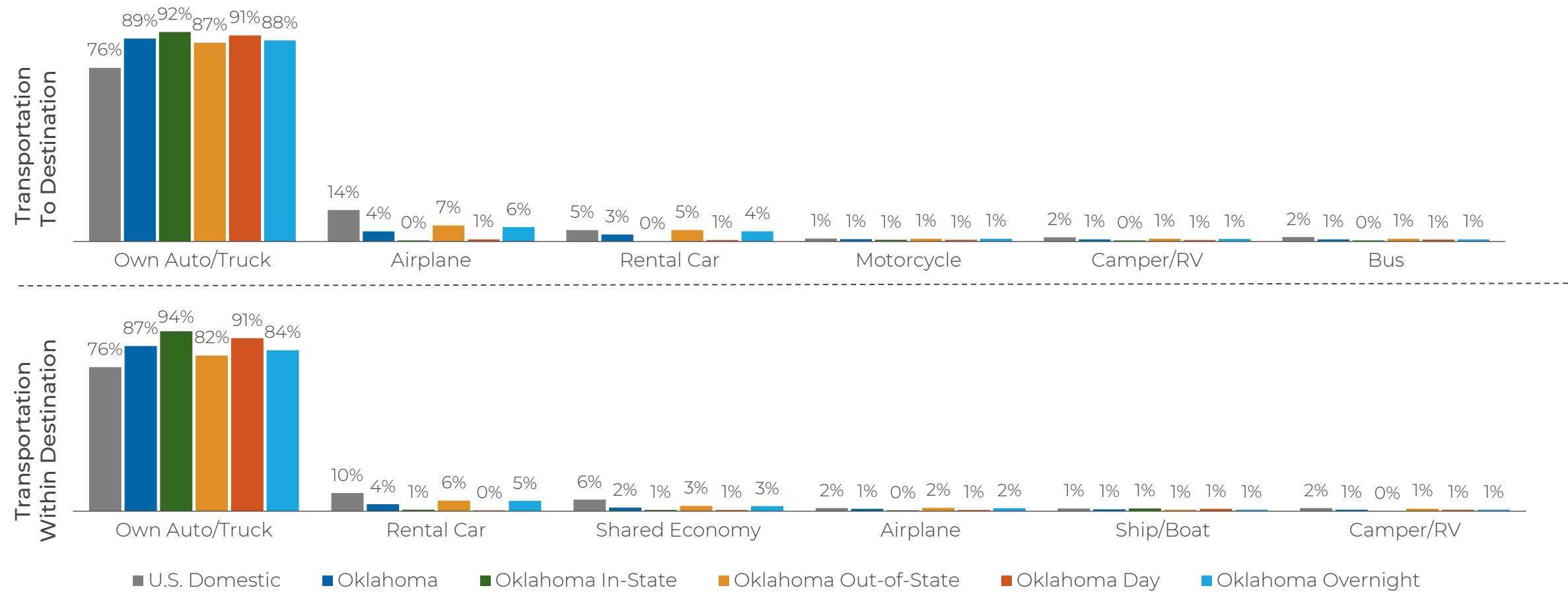


Travel for leisure expanded in 2022, thanks to an increase among in-state visitors

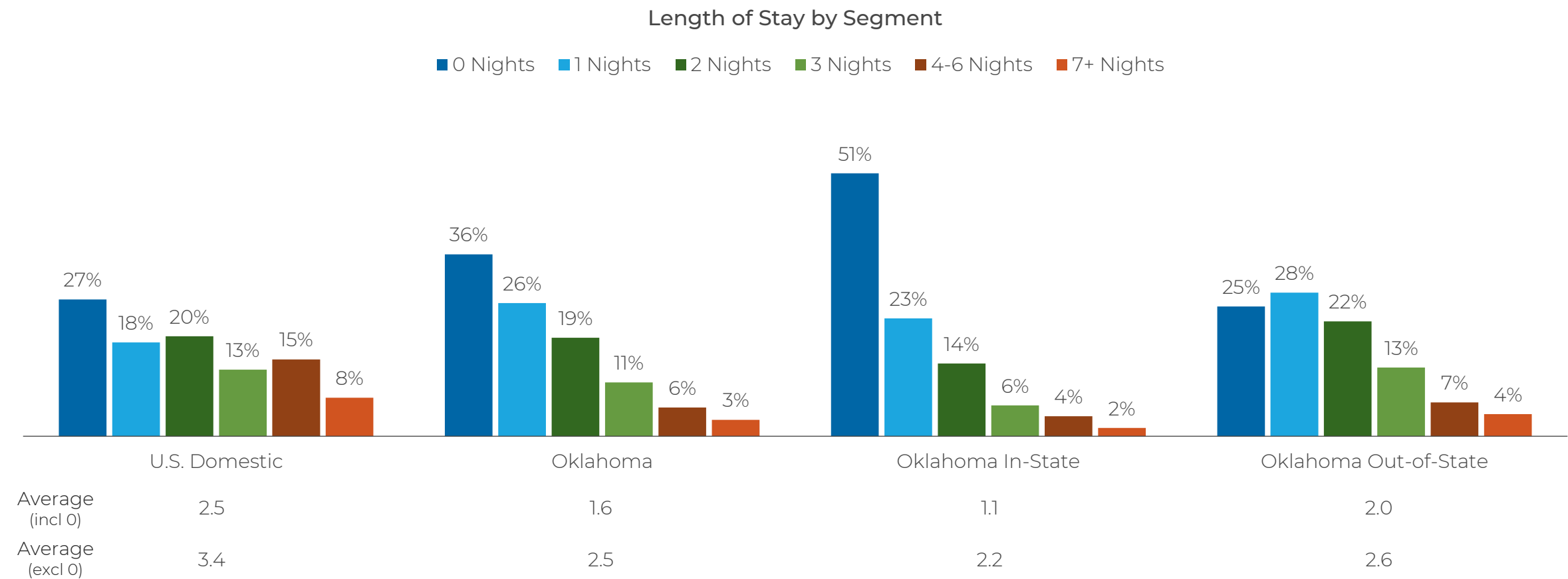
- Among in-state and out-of-state Oklahoma trips, visiting friends and family rose +2 pts and +1 pt., respectively. It remains Oklahoma's largest share of visitors. Relative to the U.S. Domestic market overall, outdoor recreation represented a smaller relative share of Oklahoma travel – suggesting potential room for growth in this segment.
- Entertainment/sightseeing travel increased to a share of 22% of Oklahoma visits, outpacing overall domestic travel.

	U.S. Domestic Travel		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors		Oklahoma Leisure Overnight Visitors		Oklahoma Leisure Day Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Primary Trip Purpose												
Leisure (net)	83%	84%	81%	82%	75%	78%	85%	85%	100%	100%	100%	100%
Visit Friends/Relatives	43%	41%	38%	39%	39%	41%	36%	37%	49%	49%	43%	43%
Outdoor Recreation	11%	11%	7%	7%	7%	8%	6%	6%	9%	10%	6%	4%
Entertainment/Sightseeing	14%	17%	21%	22%	13%	16%	27%	26%	24%	26%	28%	30%
Other Personal	15%	15%	16%	15%	16%	14%	16%	16%	18%	16%	23%	24%
Personal Business	7%	6%	8%	8%	12%	12%	4%	5%	-	-	-	-
Business	7%	7%	7%	5%	7%	5%	7%	5%	-	-	-	-
Other	3%	3%	4%	5%	6%	6%	4%	5%	-	-	-	-

Oklahoma visitors were more likely to drive and less likely to travel via airplane than domestic travelers in 2022

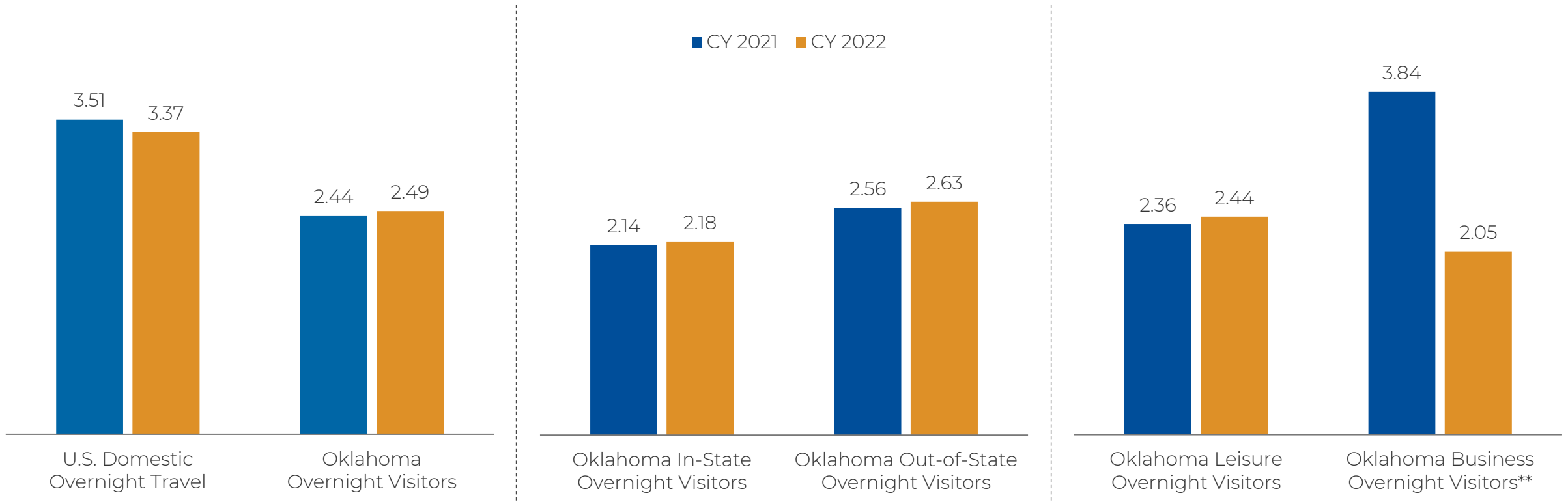


Oklahoma's proportion of day trips outpaced U.S. domestic day trips in 2022

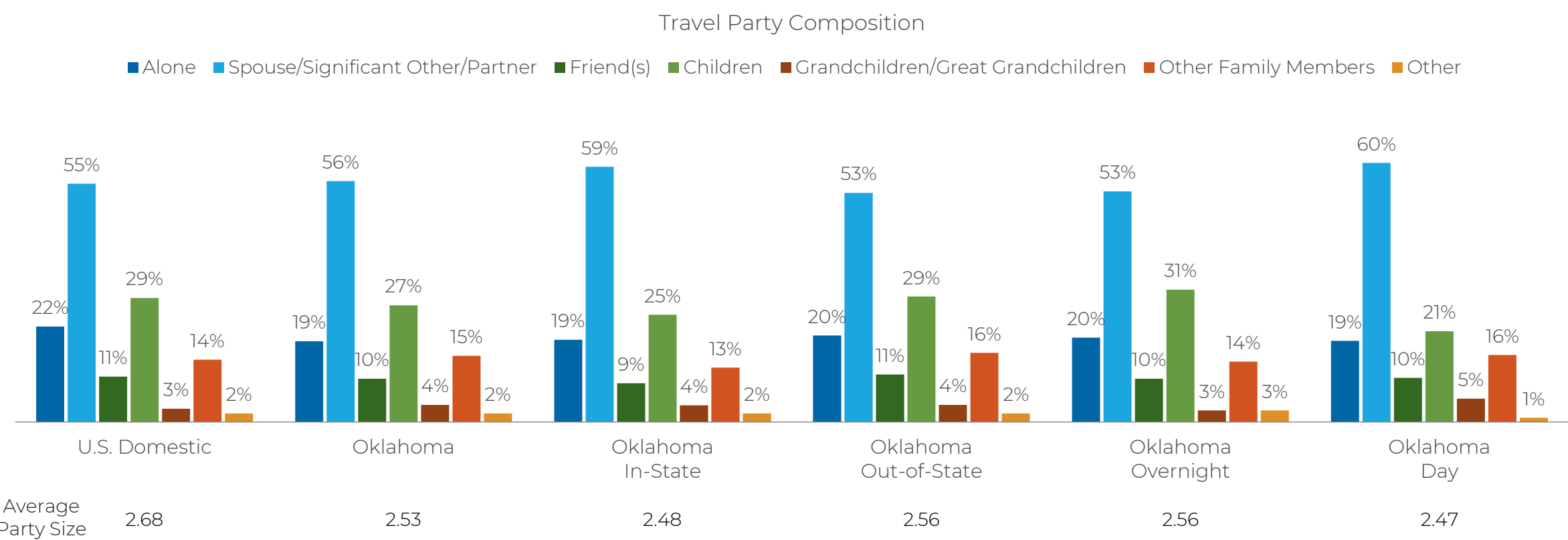


Despite an increase in length of stay among overnight travelers, Oklahoma still falls below the national average

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



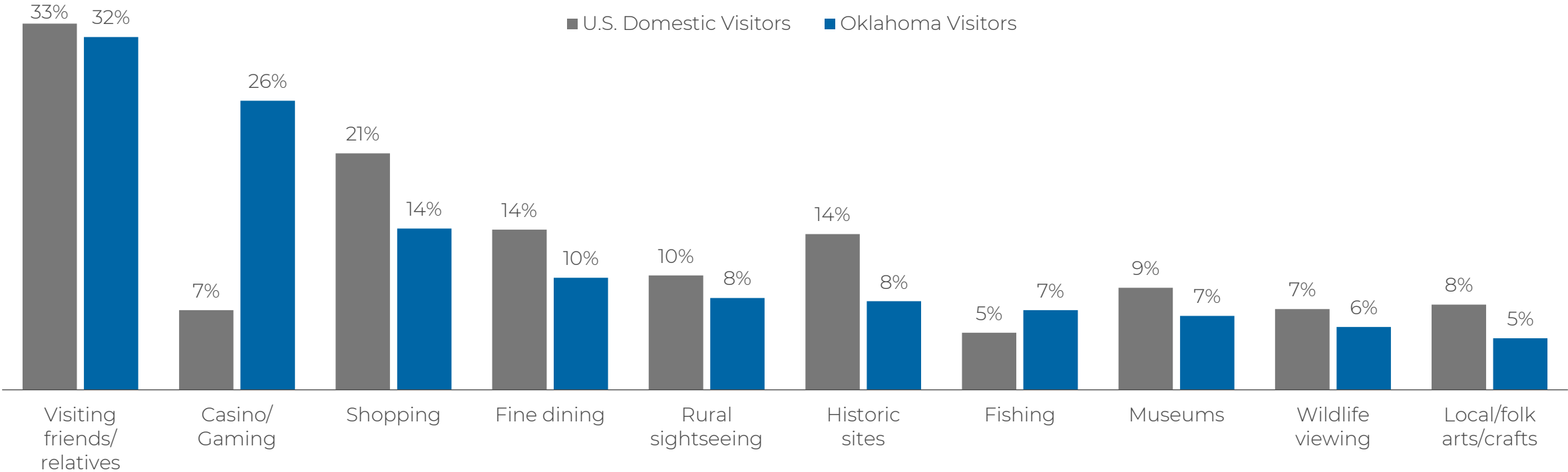
Oklahoma overnight visitors were more likely to be traveling with their children, compared to day visitors



Note: figures reflect respondents indicating who was in their travel party, regardless of whether they reside in the same household. For this reason, the percentage of children may differ from the percentage of children in household shown on slides 63 and 71.

Oklahoma visitors were more likely to enjoy casinos and gaming and less likely to go shopping than U.S. travelers

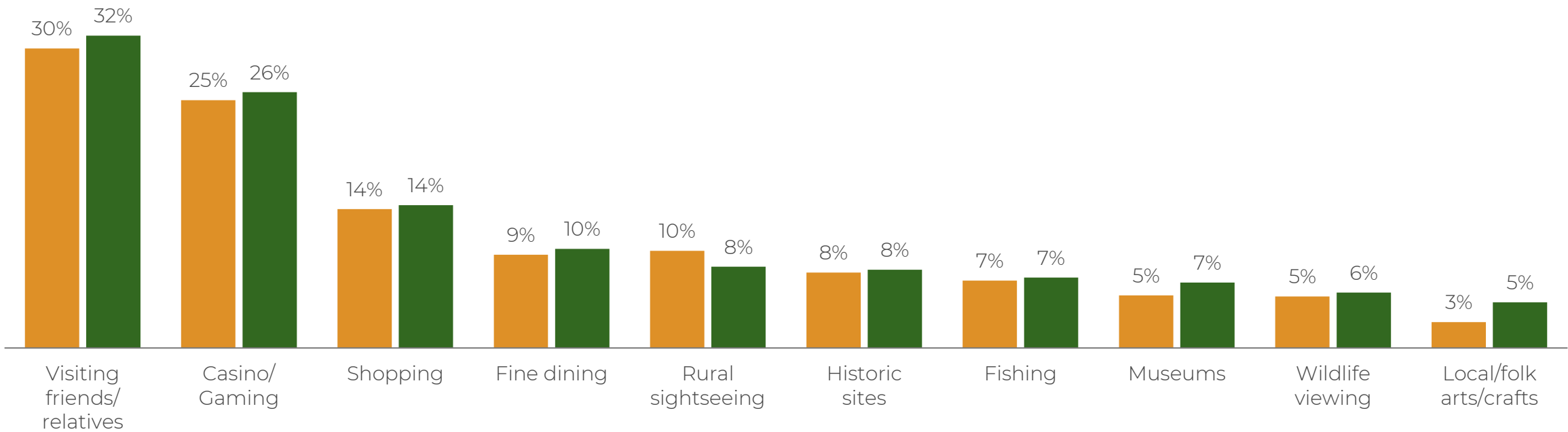
Top Activity Participation while Visiting States
(ranked by Oklahoma visitors)



Activity participation levels in 2022 remain at similar levels as the previous year

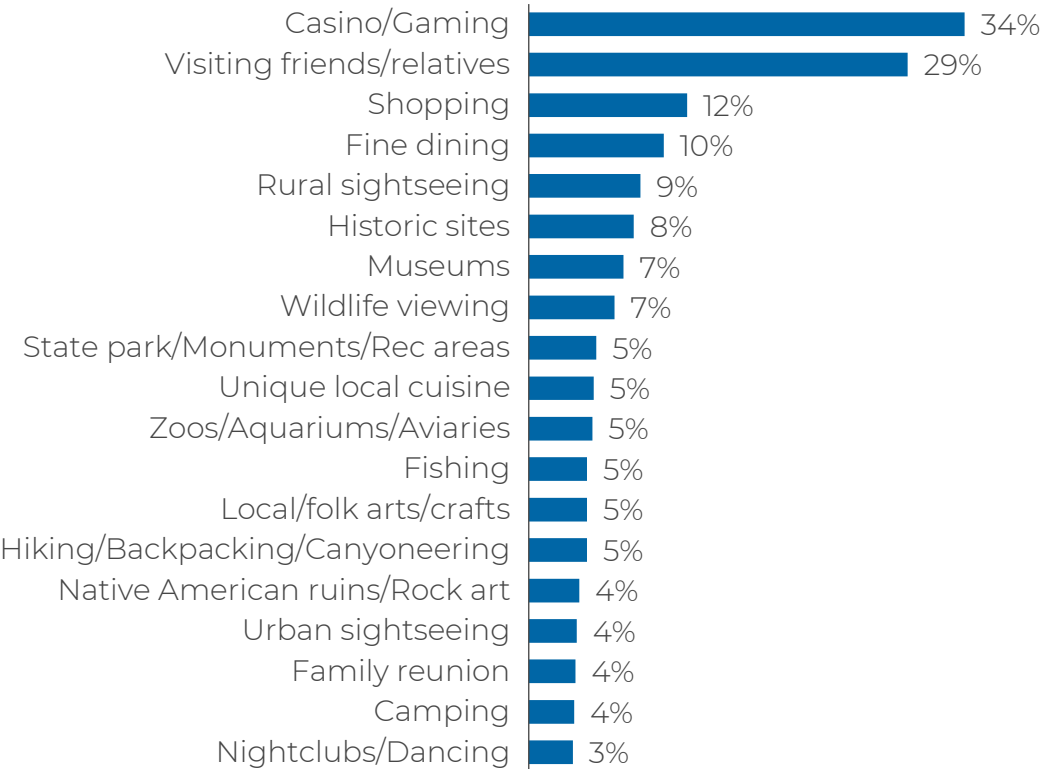
Top Activities for Oklahoma Visitors YOY
(ranked by Oklahoma visitors)

CY 2021 CY 2022

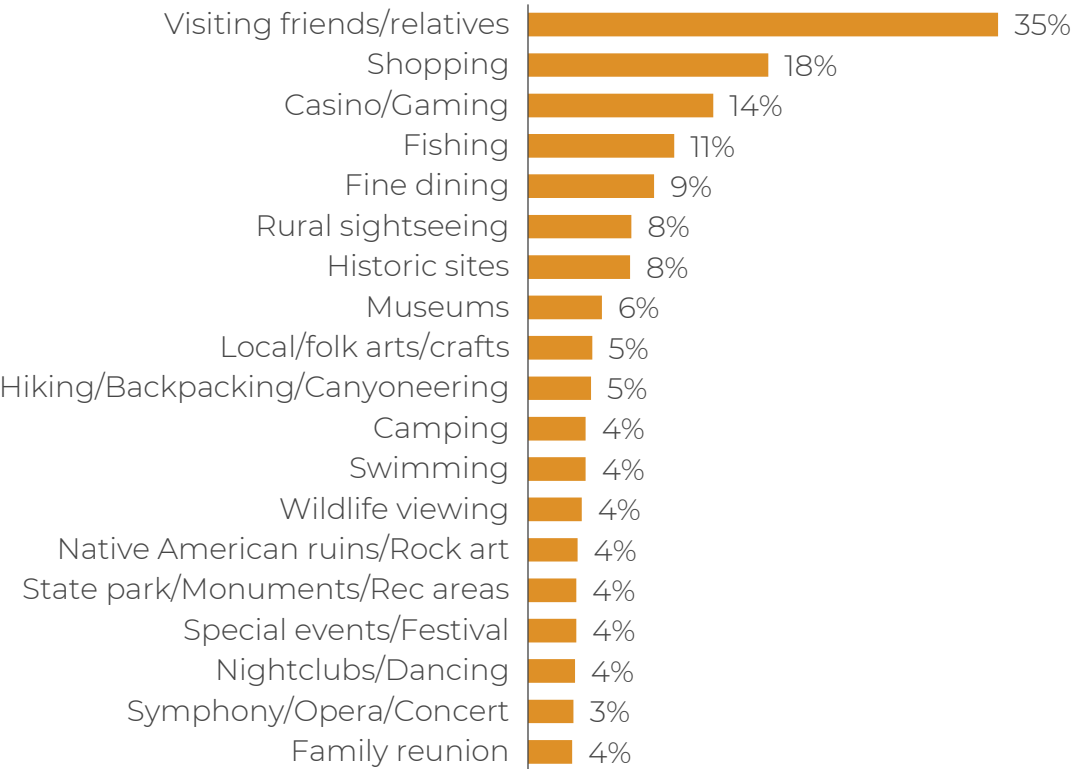


While casino/gaming is the top activity for out-of-state visitors, visiting friends/relatives remains at the top for in-state visitors

Top Activities of Oklahoma Out-of-State Visitors

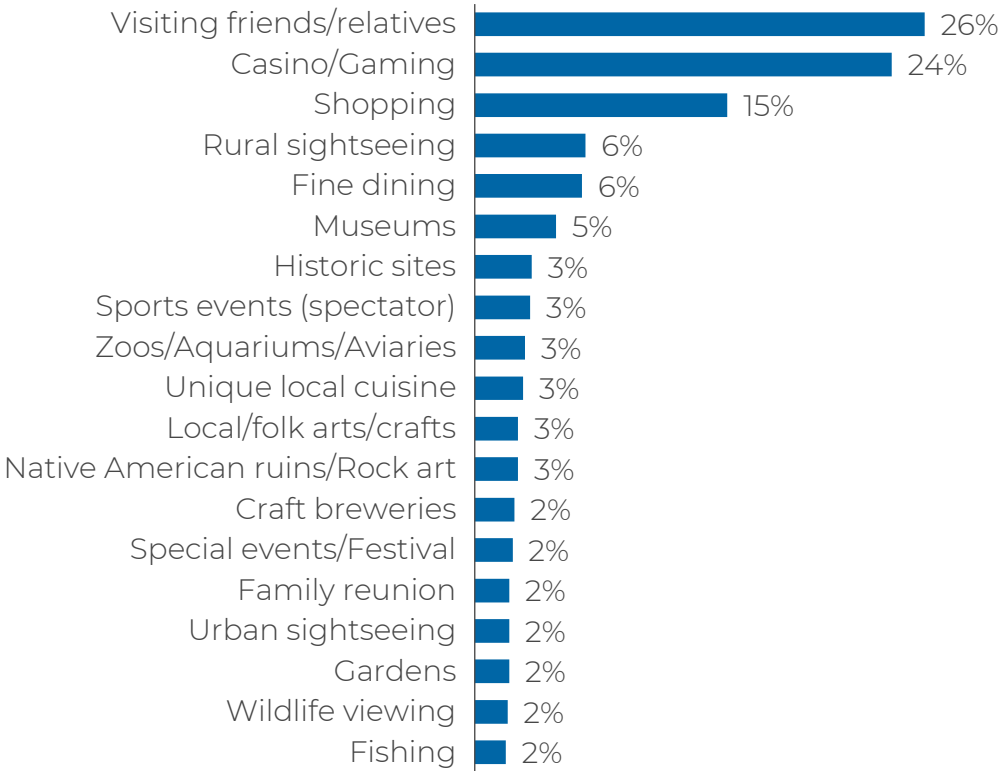


Top Activities of Oklahoma In-State Visitors

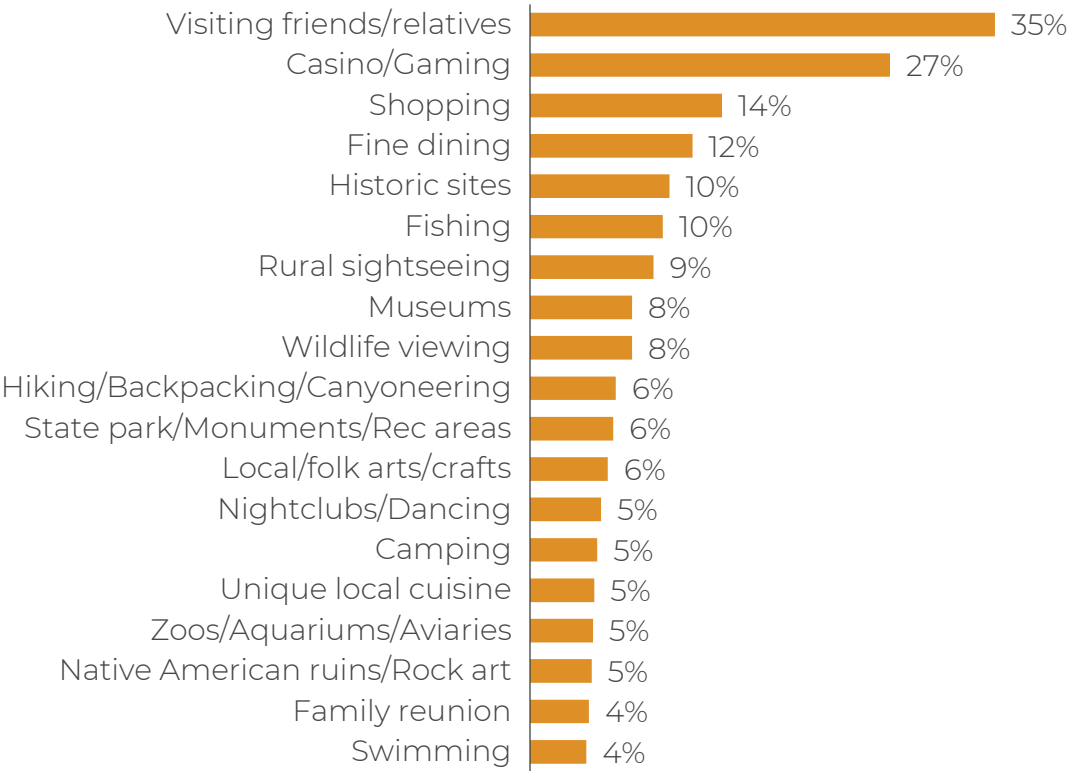


Activity participation rates were higher for overnight visitors than day visitors in 2022

Top Activities of Oklahoma Day Visitors



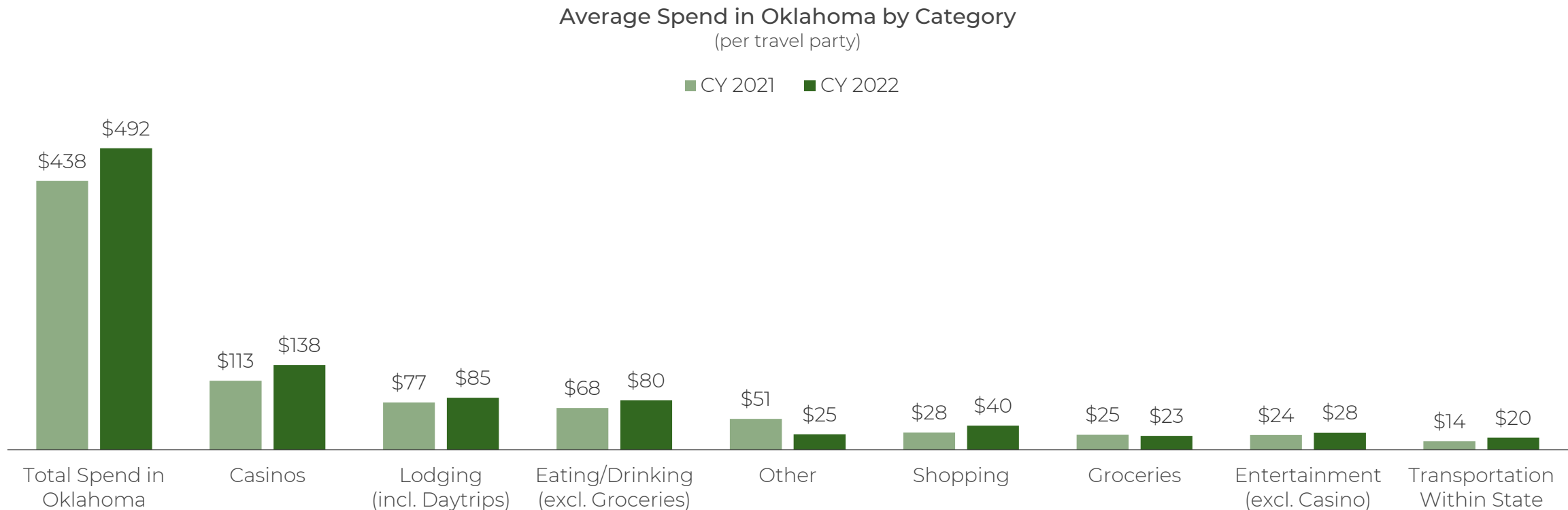
Top Activities of Oklahoma Overnight Visitors



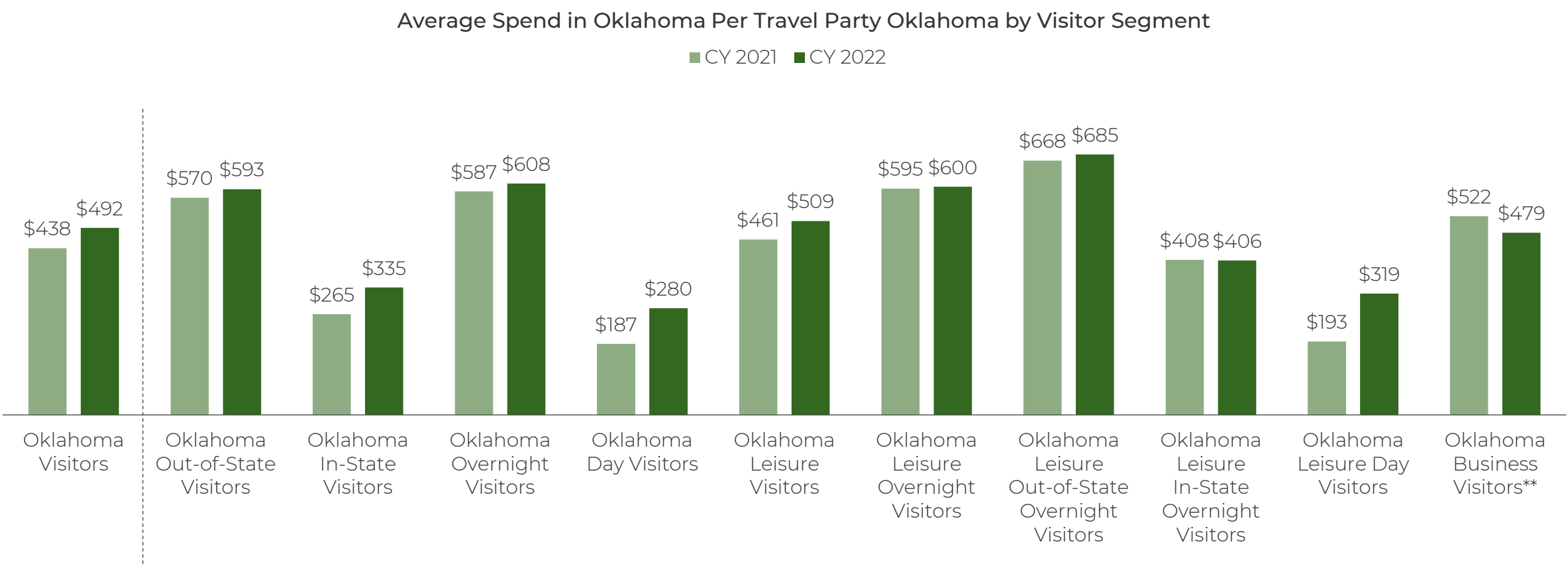
EXPENDITURES



On average, travel parties spent more in Oklahoma in 2022

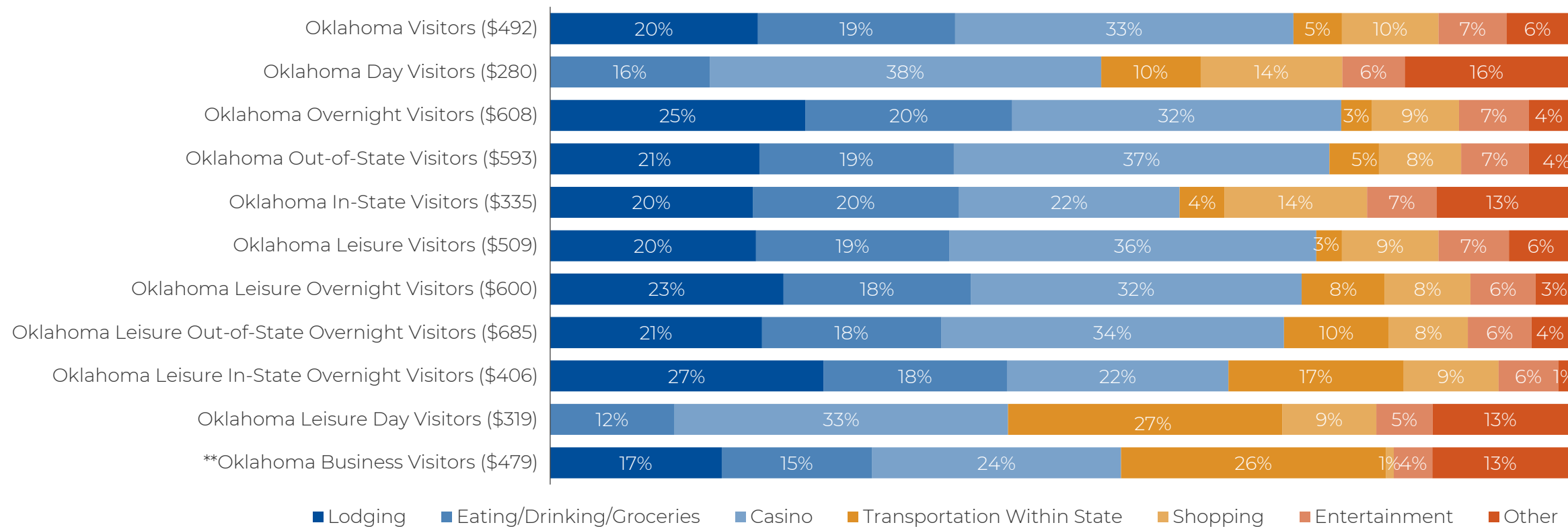


Travel party spend across nearly all travel segments in Oklahoma increased in 2022



Overnight travelers spent more than twice as much as day travelers

Average Expenditure Per Travel Party Per Trip in Oklahoma by Segment

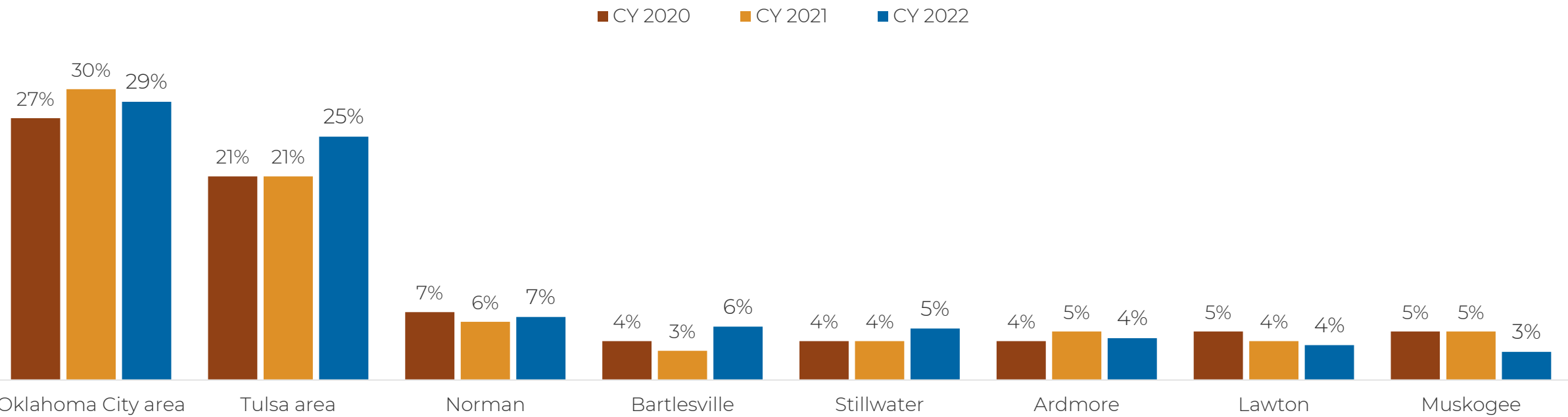


OKLAHOMA DESTINATIONS



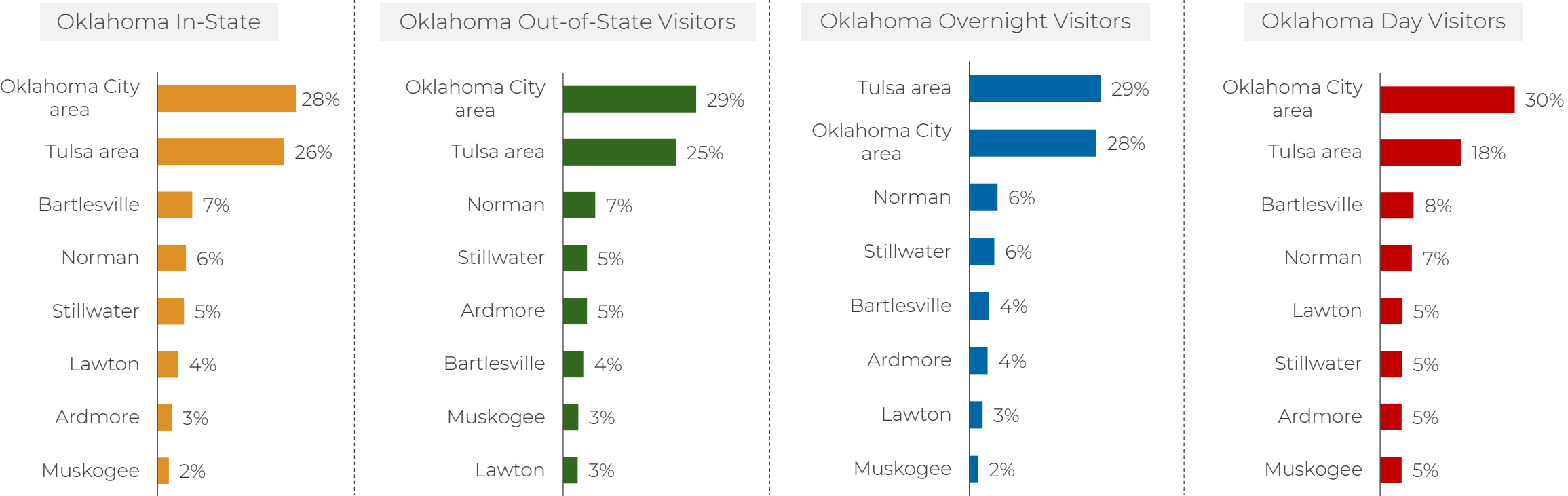
Oklahoma’s largest cities—Oklahoma City and Tulsa—are consistently the most visited destinations in the state

Trends in Top Oklahoma Destinations for Visitors



Oklahoma City and Tulsa are consistently the top destinations across all visitor segments

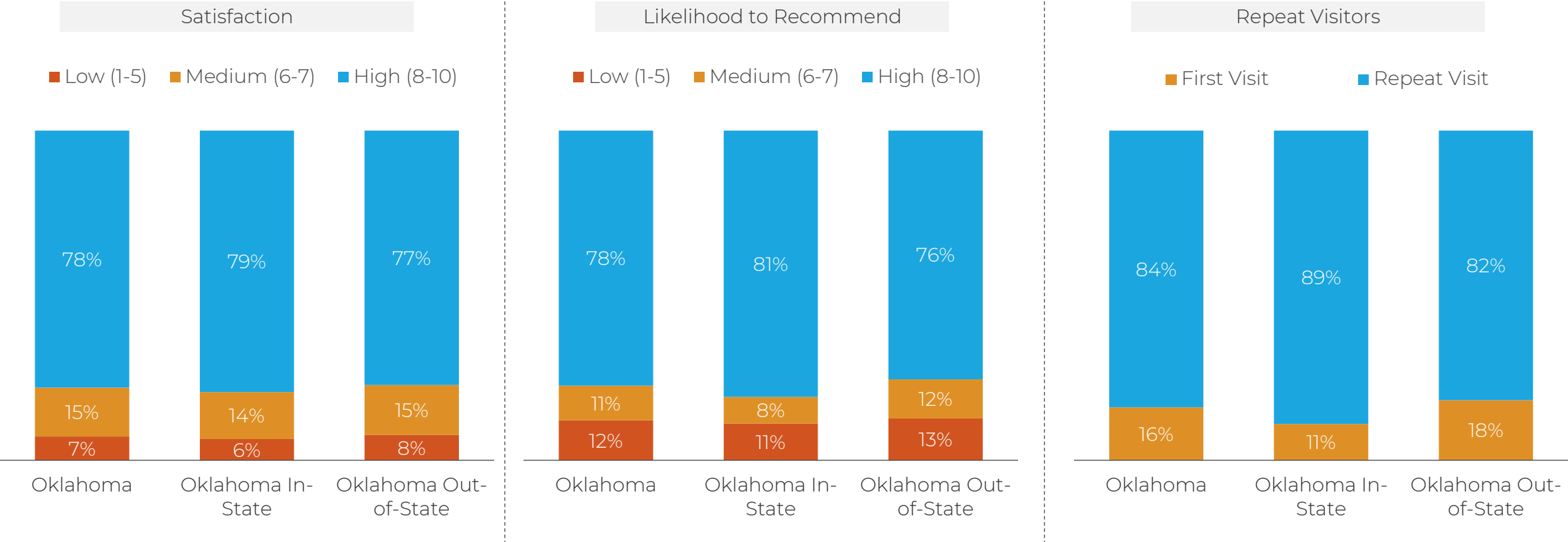
Top Oklahoma Destinations in 2022 by Visitor Segment



SATISFACTION & TRAVEL INTENT

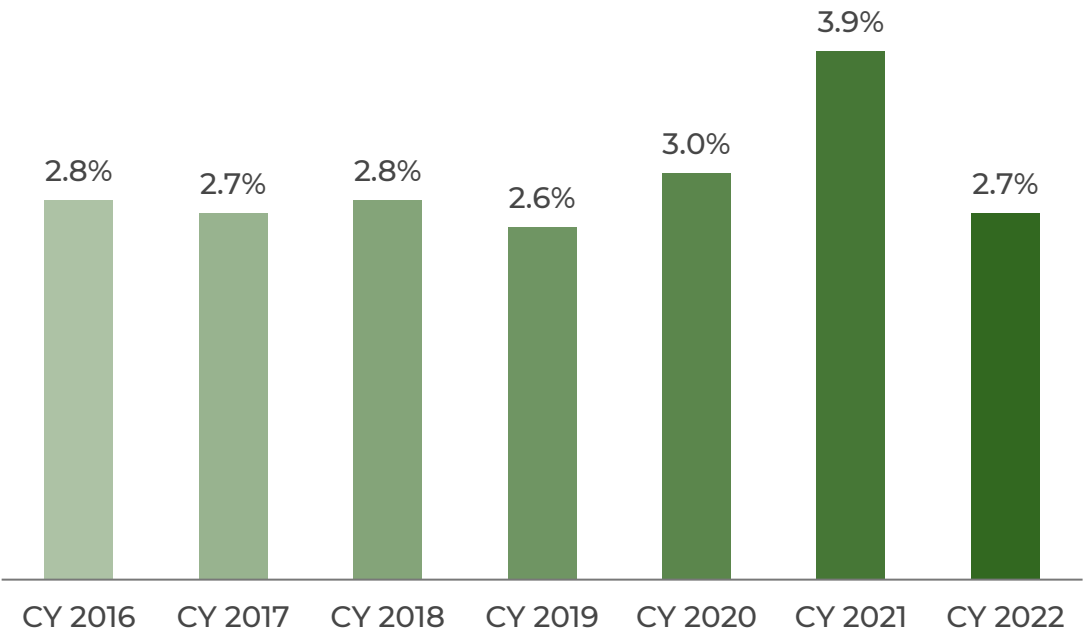


In-state visitors were more likely to have high satisfaction than out-of-state visitors, leading to a stronger repeat visitor base

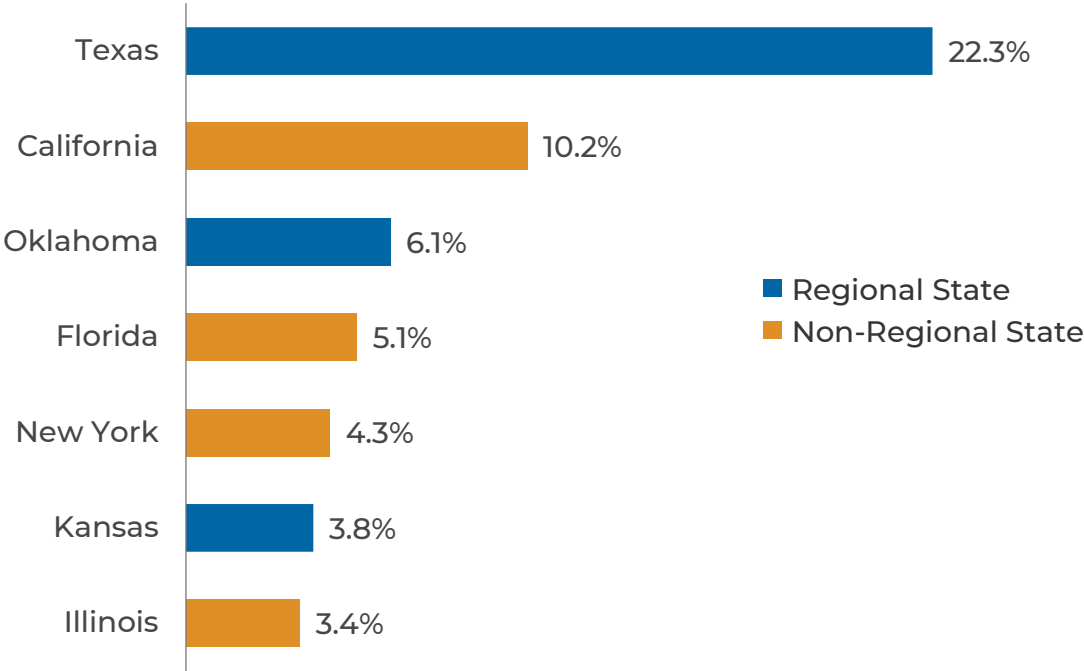


Oklahoma leisure travel intent regressed to pre-pandemic levels

Considering Oklahoma Leisure Trip within Next 2 Years



Top Origin States for Oklahoma Leisure Intent



DEMOGRAPHICS



Oklahoma's visitors tend to be slightly older than U.S. travelers

	All U.S. Visitors		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Age								
18-34	32%	32%	27%	27%	32%	30%	23%	26%
35-54	34%	33%	34%	34%	33%	32%	35%	35%
55+	35%	35%	39%	39%	35%	37%	42%	40%
Average Age	46.0	46.6	47.4	48.3	45.4	47.6	48.8	48.8
Household Income								
Under \$50,000	25%	24%	34%	28%	40%	25%	31%	29%
\$50,000-\$74,999	24%	22%	23%	23%	23%	30%	23%	20%
\$75,000-\$99,999	19%	16%	18%	17%	17%	19%	18%	16%
\$100,000+	32%	38%	25%	32%	21%	27%	28%	35%
Employment								
Full-Time	55%	55%	46%	54%	44%	53%	48%	55%
Retired	17%	18%	22%	22%	17%	22%	25%	21%

The proportion of Oklahoma visitors with a Bachelor's degree or higher increased from 41% to 48% in 2022

	All U.S. Visitors		Oklahoma Visitors		Oklahoma In-State Visitors		Oklahoma Out-of-State Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Marital Status								
Married	72%	72%	78%	80%	76%	80%	78%	79%
Ethnicity/Race								
Caucasian/White	83%	83%	83%	87%	84%	85%	83%	88%
African-American/Black	6%	6%	4%	4%	2%	2%	5%	5%
Hispanic	8%	8%	5%	6%	4%	4%	6%	7%
Children								
Children in Household	37%	36%	36%	33%	41%	33%	33%	33%
Education								
Bachelor Degree or Higher	53%	53%	41%	48%	40%	48%	41%	48%

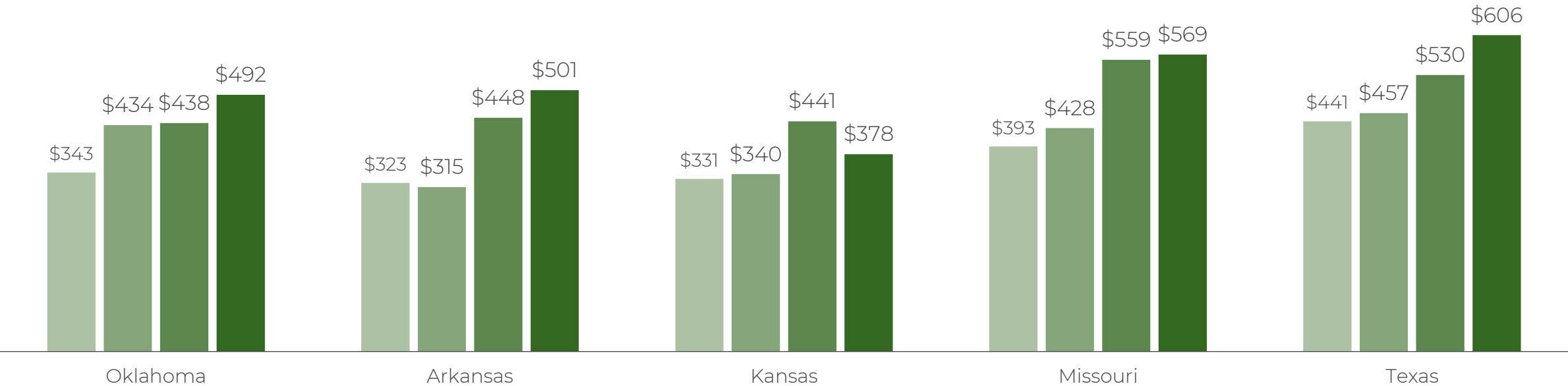
COMPETITIVE ENVIRONMENT



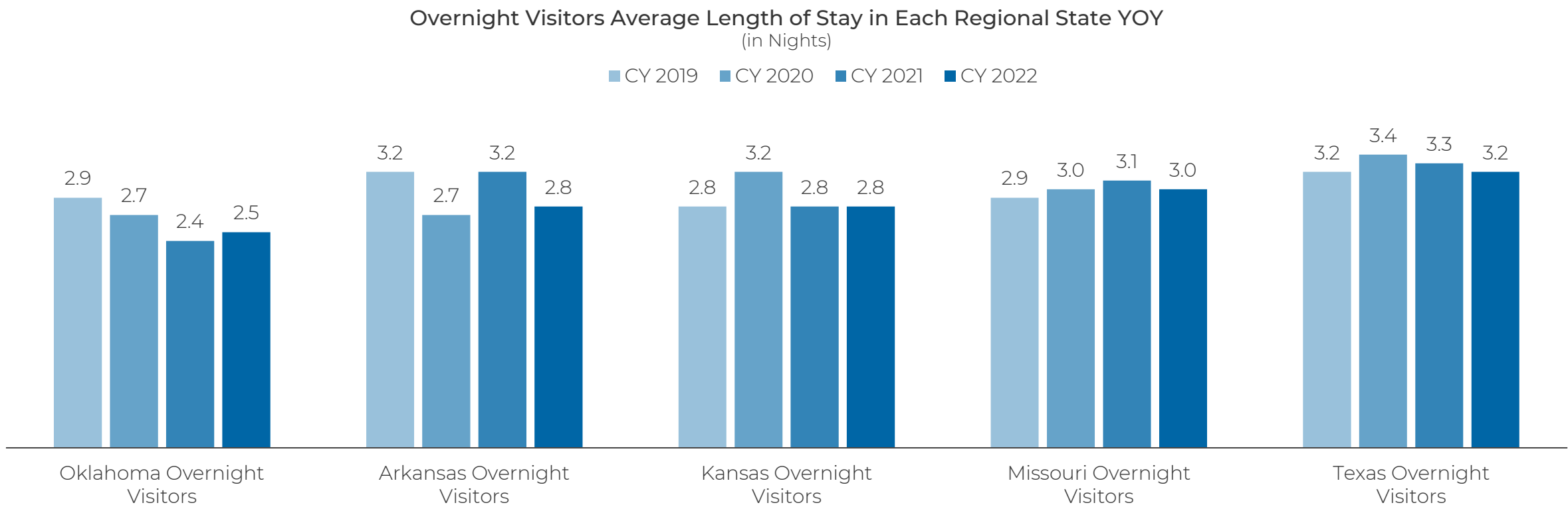
Oklahoma and its neighboring competitors have seen increases in visitor spending since 2019

Average Expenditure Per Travel Party within Each Regional State
(figures exclude transportation cost to get to state and include responses of \$0)

CY 2019 CY 2020 CY 2021 CY 2022



Oklahoma was the only state in its competitive set to see an increase in average length of stay in 2022



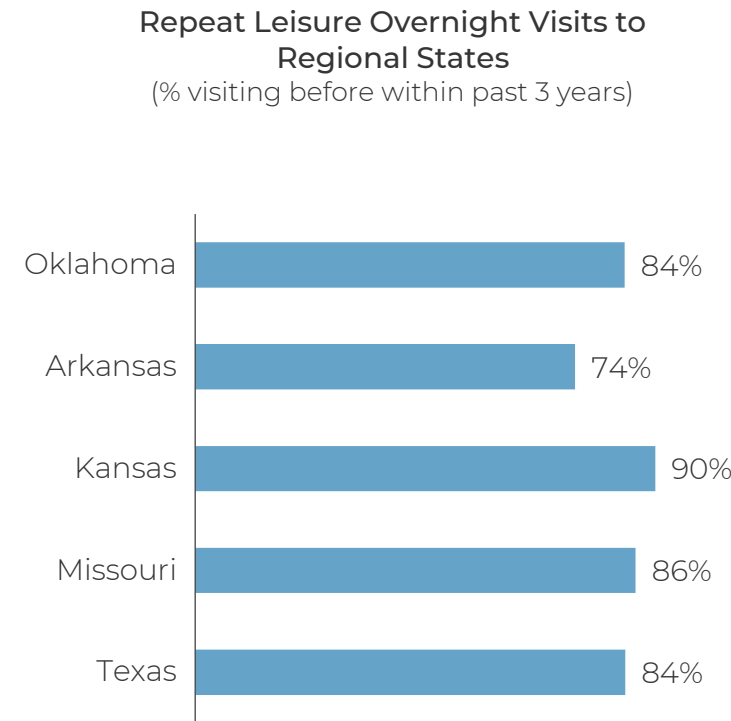
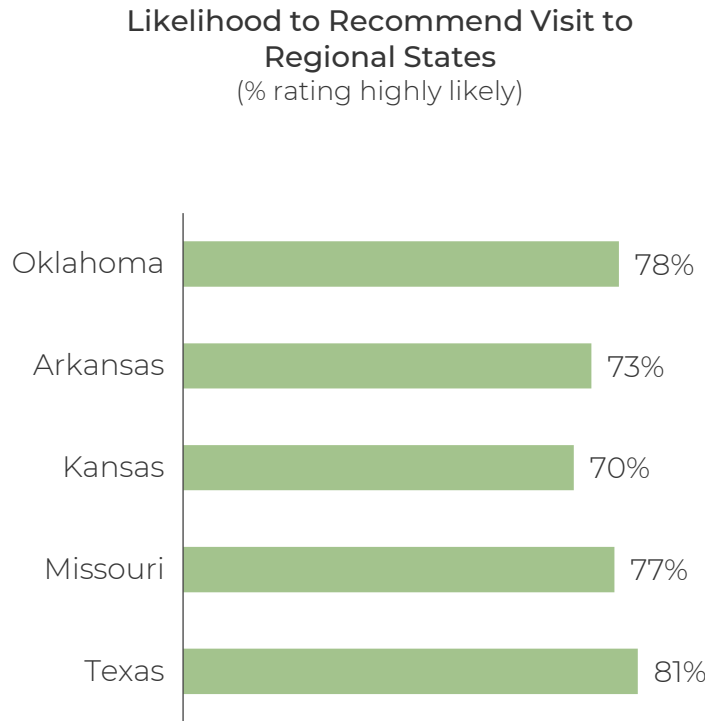
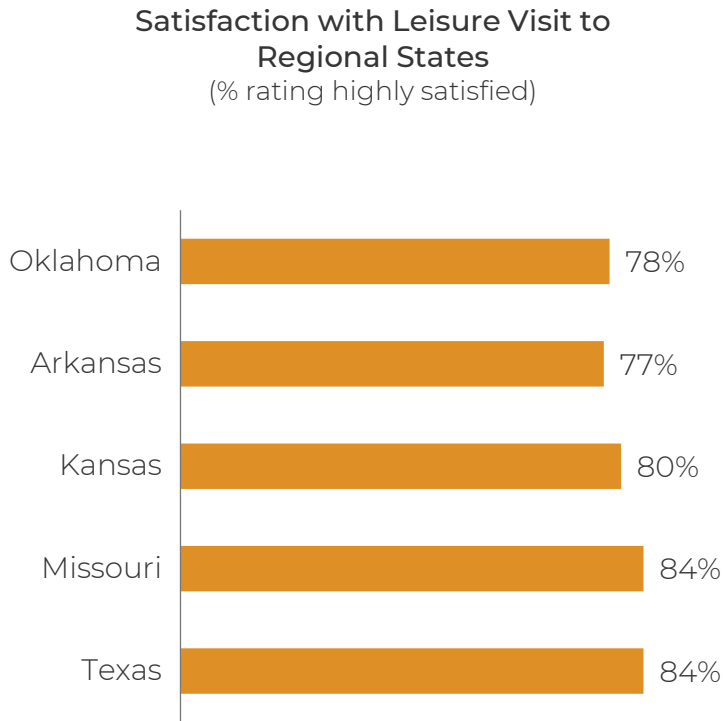
Roughly four out of every five trips to Oklahoma and regional states were for leisure purposes in 2022

	Oklahoma Visitors		Arkansas Visitors		Kansas Visitors		Missouri Visitors		Texas Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Primary Trip Purpose										
Leisure (net)	80%	82%	78%	81%	78%	76%	81%	83%	78%	78%
Visit Friends/Relatives	37%	39%	39%	38%	48%	48%	43%	40%	44%	43%
Outdoor Recreation	6%	7%	11%	14%	4%	7%	10%	9%	10%	8%
Entertainment/Sightseeing	21%	22%	14%	14%	12%	10%	16%	20%	12%	13%
Other Personal	15%	15%	14%	15%	13%	11%	12%	14%	12%	13%
Personal Business	8%	8%	8%	8%	8%	8%	9%	6%	8%	8%
Business	7%	5%	9%	7%	9%	9%	6%	8%	10%	10%
Other	5%	5%	5%	4%	6%	7%	4%	3%	4%	5%

Average travel party size plateaued for Oklahoma while increasing for regional competitors

	Oklahoma Visitors		Arkansas Visitors		Kansas Visitors		Missouri Visitors		Texas Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Average Travel Party Size	2.53	2.53	2.72	2.74	2.46	2.61	2.65	2.82	2.59	2.70
Adults in Travel Party										
One Adult	27%	25%	27%	27%	33%	32%	27%	23%	31%	32%
Two Adults	58%	58%	58%	58%	54%	53%	55%	57%	52%	50%
Three Adults	9%	10%	8%	9%	8%	9%	10%	9%	10%	10%
Four or More Adults	6%	7%	8%	7%	6%	6%	8%	10%	7%	8%
Family Travel										
Travel with children from household	23%	22%	28%	30%	22%	23%	25%	26%	26%	26%
Average Number of Children in Party	1.78	1.79	1.64	1.85	1.85	1.87	1.72	1.76	1.71	1.73

High satisfaction and likelihood to recommend among its visitors results in a strong repeat visitor base for Oklahoma

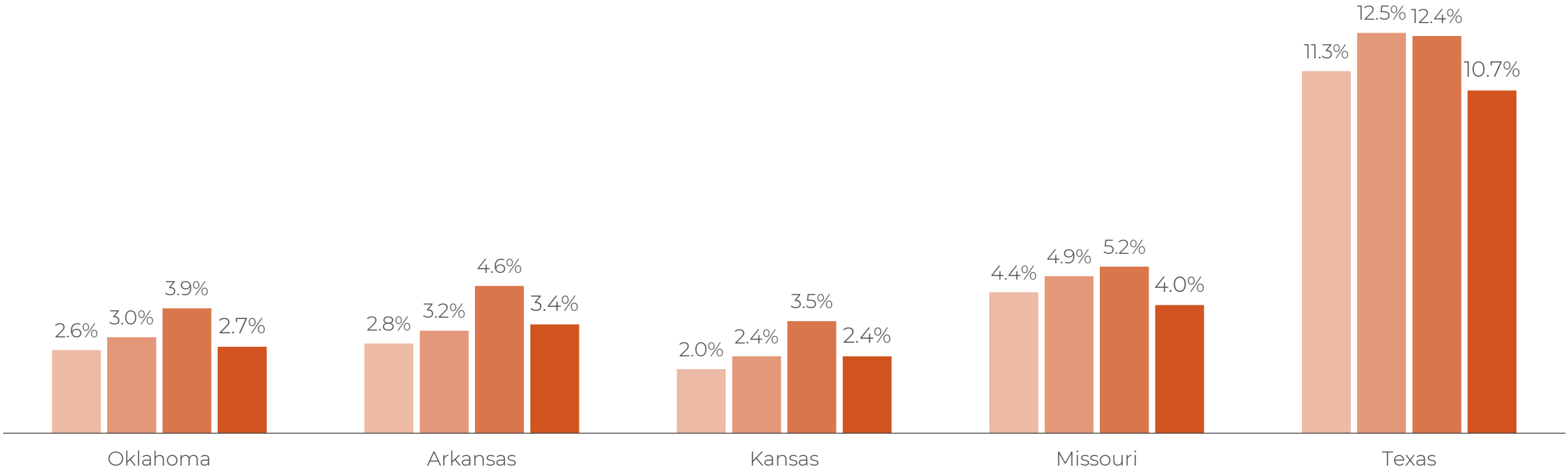


*High satisfaction and high likelihood to recommend rating includes those who have rated their trip satisfaction/likelihood to recommend as 8-10.

Leisure travel intent decreased for Oklahoma and all neighboring competitor states in 2022

Intent to Visit within Next 2 Years by Competitive Set State

CY 2019 CY 2020 CY 2021 CY 2022



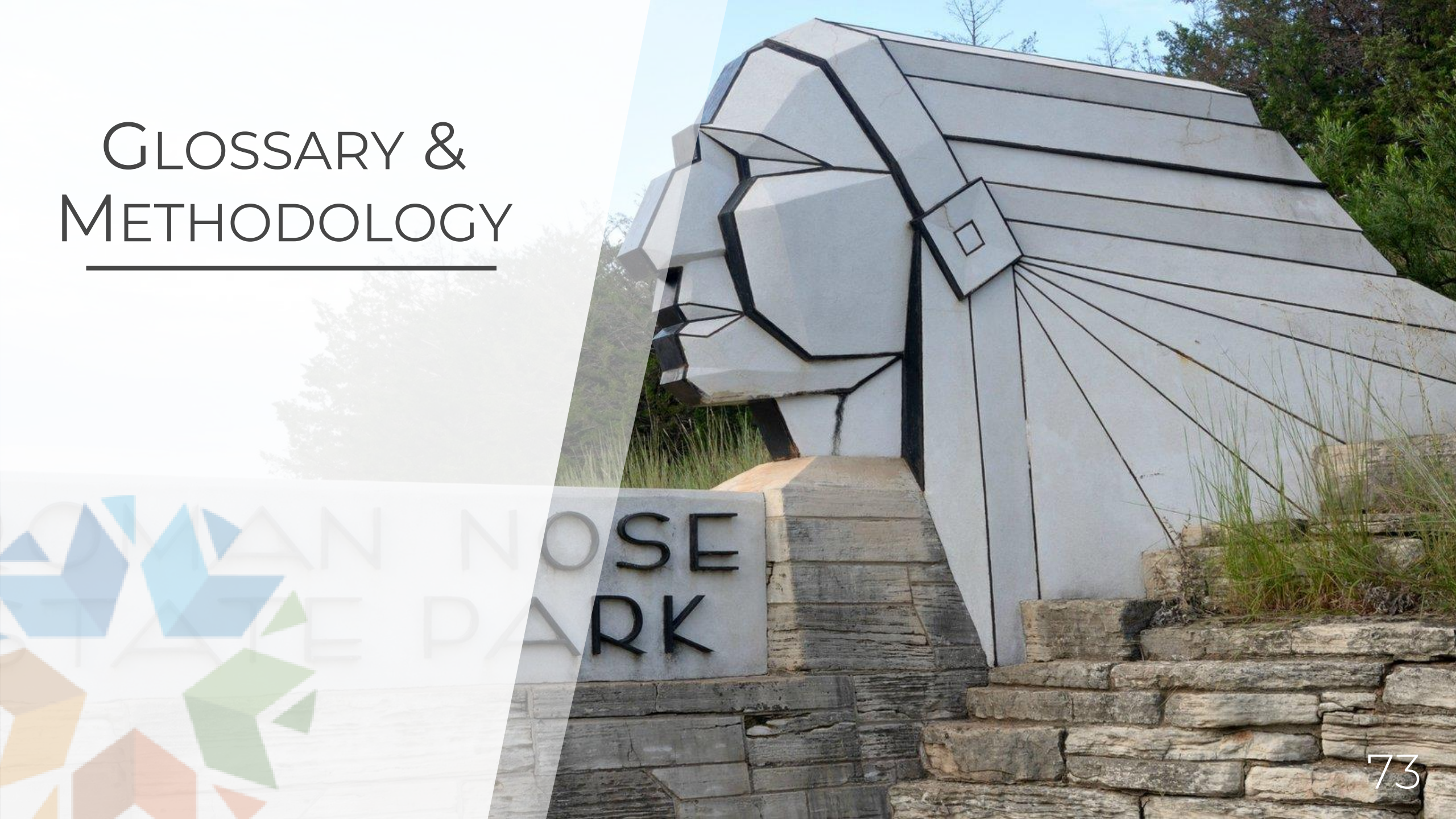
Oklahoma visitors tend to be slightly older and less likely to have children than regional competitors

	Oklahoma Visitors		Arkansas Visitors		Kansas Visitors		Missouri Visitors		Texas Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Average Age	47.4	48.3	44.5	46.3	47.0	47.0	48.0	47.5	45.2	45.0
Household Income										
Under \$50,000	34%	28%	28%	26%	31%	29%	26%	24%	28%	27%
\$50,000 - \$74,999	23%	23%	20%	23%	23%	21%	30%	24%	24%	21%
\$75,000 - \$99,999	18%	17%	17%	17%	18%	21%	18%	18%	19%	15%
\$100,000+	25%	32%	35%	34%	28%	30%	25%	34%	29%	37%
Resident										
In-State Visitor	45%	37%	36%	38%	38%	39%	41%	38%	71%	69%
Marital Status										
Married	78%	80%	80%	79%	80%	78%	79%	79%	74%	73%
Children										
Children in Household	36%	33%	45%	44%	35%	34%	36%	38%	40%	40%

Oklahoma attracts a higher proportion of visitors with full-time employment than most other regional states

	Oklahoma Visitors		Arkansas Visitors		Kansas Visitors		Missouri Visitors		Texas Visitors	
	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022	CY 2021	CY 2022
Employment										
Full time	46%	54%	56%	53%	50%	53%	50%	52%	53%	57%
Retired	22%	22%	16%	22%	20%	20%	23%	22%	17%	17%
Education										
Bachelor or Higher	41%	48%	46%	44%	48%	47%	48%	50%	50%	50%
Race/Ethnicity										
White	83%	87%	86%	86%	93%	92%	90%	91%	81%	81%
Hispanic	5%	6%	4%	7%	5%	5%	4%	4%	16%	17%
Black/African American	4%	4%	5%	7%	2%	1%	3%	3%	7%	8%

GLOSSARY & METHODOLOGY



Glossary

Term	Definition
Origin DMA	Designated Market Area: areas where respondents live that share the same primary TV broadcast signals (210 DMAs in US).
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).
Trip	Travel 50+ miles (one-way) away from home or overnight. Excludes commuters or commercial travel (i.e., flight attendants, commercial vehicle operator).
U.S. Travelers	U.S. residents who have taken at least one “trip” during the past 12 months.
U.S. Domestic Travel	U.S. residents who visited at least one U.S. destination on a “trip” during the period.
Oklahoma Visitor	A U.S. traveler who visited Oklahoma during the specified time period.
Niche Activity Motivations	An activity or group of activities that an Oklahoma visitor participated in and indicated it was a reason for their visit.
Outdoor Recreationalist	Activities: camping, biking, fishing, horse riding, kayaking/canoeing/paddleboarding, sailing, ATV/4-wheeling, golf, boating, hiking, hang gliding/skydiving/base jumping, water skiing, swimming
Casino/Gaming	Activities: casino/gaming
Nature & Rural Explorer	Activities: bird watching, state/national parks/monument/rec areas, farms/agri-tours, rural sightseeing, other nature, nature travel/eco-touring, wildlife viewing
Arts & Culture	Activities: art galleries, historic sites, Native American ruins, museums, theater, symphony/concert, local/folk art/craft
Urban Explorer	Activities include fine dining, nightclubs/dancing, shopping, spa/health club, craft breweries, urban sightseeing
Entertainment	Activities: music festival, motor sports, major/professional sports events, youth/amateur/college sports events (spectator), zoos/aquariums/aviaries, special event/festival, theme/amusement/water park
Family & Friends	Activities include visiting friends/relatives, family reunion.

TravelTrakAmerica Syndicated Research

TravelTrakAmerica is a comprehensive national travel study of U.S. households focusing on domestic travel. The syndicated study collects general information on travelers (e.g., demographics, perceptions, travel intent) and detailed information about past-month travel.



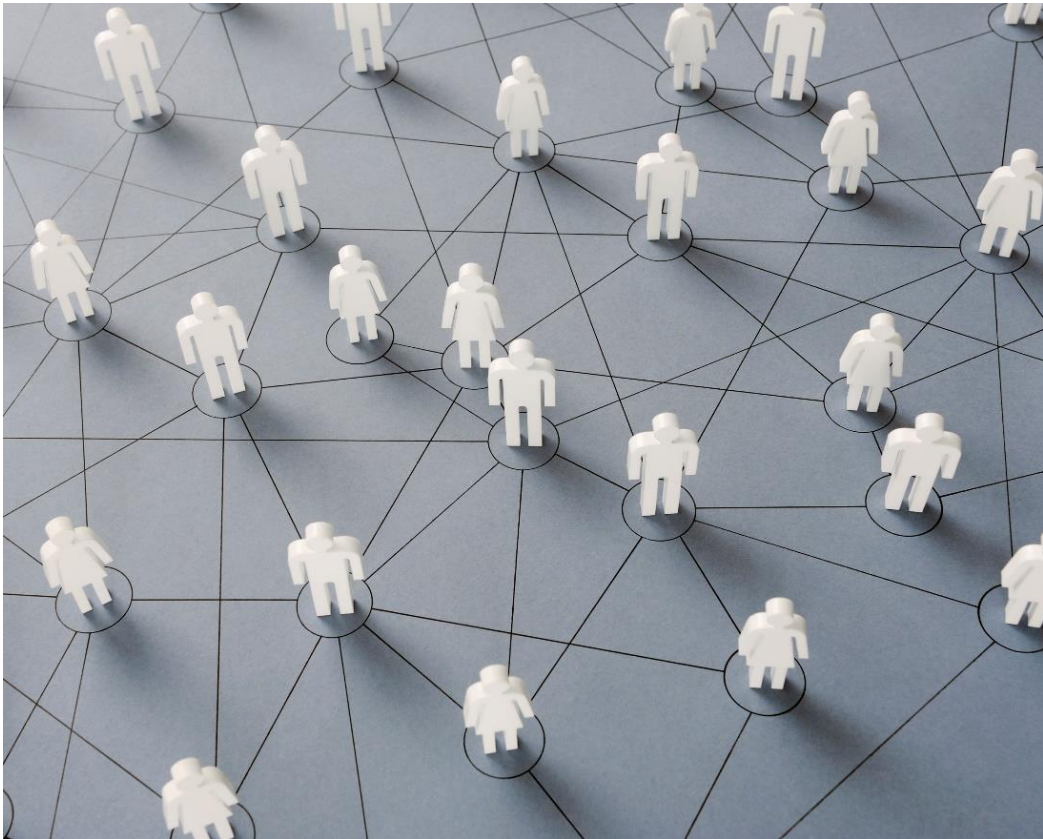
Methodology:

Omnitrak sources survey respondents from a single managed panel provider to administer the monthly TravelTrakAmerica survey to a nationally representative sample of U.S. households.

Each month a variety of general information (e.g., demographics, perceptions, travel intent, etc.) is collected from more than 9,000 U.S. travelers. “Travelers” are defined as having taken one or more trip(s) more than 50 miles from home (each-way, excluding commuters) during the past 12 months.

Details about trips taken during the past-month are collected from approximately 4,000 travelers who took at least one trip in the prior month. To ensure the survey captures all destinations visited to the best of its ability, when asked where they went in a state, respondents are provided with an option to type in the destination they visited.

Sample



Sample Collections: January - December

	2021 Unweighted	2021 Demographic Weighted	2022 Unweighted	2022 Demographic Weighted
Total U.S. Travelers Respondents	108,240	116,616	108,240	113,901
Total U.S. Domestic Travelers Trips	54,208	59,381	48,114	51,545
Total Oklahoma Visitors	933	878	729	818
Oklahoma In-State Visitors	441	354	288	300
Oklahoma Out-of-State Visitors	492	524	441	518

TravelTrakAmerica Client Service Team



Chris Kam

President & COO

Chris leads the overall continued evolution of the TravelTrakAmerica syndicated data set, incorporating new thinking from the marketplace and integrating new technology from Omnitrak's panel provider.



Lydia Poole

Research Manager

Lydia is the driving force who keeps TravelTrakAmerica moving forward. She lives and breathes the syndicated data and enjoys engaging with clients to help them uncover insights. Prior to joining Omnitrak, Lydia worked for VISIT FLORIDA.



Levi Tamosaitis

Market Insights Data Analyst

Levi lives for analyzing large, record-level datasets and ensuring that everything TravelTrakAmerica is "mathematically correct". Prior to joining Omnitrak, Levi worked for the South Carolina Department of Parks, Recreation & Tourism.

APPENDIX



Top Activities for Oklahoma and Domestic Visitors

Activity	Domestic Visitors	Oklahoma Visitors	Activity	Domestic Visitors	Oklahoma Visitors	Activity	Domestic Visitors	Oklahoma Visitors
Visiting friends/relatives	33%	32%	Swimming	6%	3%	Special events/Festival	3%	2%
Shopping	21%	14%	Craft breweries	6%	2%	Theater/Drama	3%	1%
None of the above	15%	18%	Other nature	5%	3%	Sports - Major/Professional	2%	1%
Beach	15%	2%	Theme park/Amusement park/Water park	5%	2%	Biking/Road biking/Cycling	2%	1%
Fine dining	14%	10%	Art Galleries	5%	2%	Kayaking/Canoeing/Paddleboarding	2%	1%
Historic sites	14%	8%	Fishing	5%	7%	Wine tasting/Winery tour	2%	1%
Rural sightseeing	10%	8%	Gardens	5%	2%	Sports - Amateur (spectator)	2%	3%
Museums	9%	7%	Family reunion	5%	4%	Farms/ranches/Agri-tours	2%	2%
Hiking/Backpacking/Canyoneering	9%	5%	Camping	5%	4%	Symphony/Opera/Concert	2%	3%
State park/Monuments/Rec areas	8%	5%	Zoos/Aquariums/Aviaries	4%	4%	ATV/Four-wheeling	2%	2%
Urban sightseeing	8%	3%	Nightclubs/Dancing	4%	4%	Area where a TV or movie was filmed	2%	1%
Local/folk arts/crafts	8%	5%	Other	4%	4%	Ocean/River cruise	2%	0%
Wildlife viewing	7%	6%	Native American ruins/Rock art	4%	4%	Spa/health club	2%	2%
Unique local cuisine	7%	4%	Bird Watching	4%	3%	Motorboat/Jet ski	2%	1%
Casino/Gaming	7%	26%	Musical festival	3%	1%	Sports - Amateur (participant)	2%	1%
National park/Monuments/Rec areas	7%	2%	Golf	3%	2%	Rock/Mountain climbing	2%	1%

Top Activities for Oklahoma Visitors (YOY)

Activity	CY 2021	CY 2022	Activity	CY 2021	CY 2022	Activity	CY 2021	CY 2022
Visiting friends/relatives	30%	32%	Native American ruins/Rock art	1%	4%	Art Galleries	1%	2%
Casino/Gaming	25%	26%	Family reunion	4%	4%	Farms/ranches/Agri-tours	2%	2%
Shopping	14%	14%	Nightclubs/Dancing	1%	4%	Spa/health club	1%	2%
Fine dining	9%	10%	Urban sightseeing	4%	3%	Beach	3%	2%
Rural sightseeing	10%	8%	Swimming	4%	3%	Musical festival	1%	1%
Historic sites	8%	8%	Sports - Amateur (spectator)	2%	3%	Horseback riding	1%	1%
Fishing	7%	7%	Bird Watching	2%	3%	Biking/Road biking/Cycling	1%	1%
Museums	5%	7%	Symphony/Opera/Concert	2%	3%	Motorboat/Jet ski	1%	1%
Wildlife viewing	5%	6%	Other nature	3%	3%	Rock/Mountain climbing	1%	1%
Hiking/Backpacking/ Canyoneering	4%	5%	Craft breweries	2%	2%	Sports - Major/Professional	0%	1%
State park/Monuments/Rec areas	5%	5%	National park/Monuments/Rec areas	3%	2%	Kayaking/Canoeing/ Paddleboarding	1%	1%
Local/folk arts/crafts	3%	5%	Gardens	2%	2%	Sports - Amateur (participant)	1%	1%
Other	4%	4%	Special events/Festival	2%	2%	Water skiing	1%	1%
Unique local cuisine	5%	4%	Theme park/Amusement park/Water park	1%	2%	Theater/Drama	1%	1%
Zoos/Aquariums/Aviaries	4%	4%	Golf	1%	2%	Area where a TV or movie was filmed	0%	1%
Camping	4%	4%	ATV/Four-wheeling	1%	2%	Mountain biking	0%	1%

Destination Trends in Day/Overnight Visitors

Trends in Top Oklahoma Destinations for Overnight and Day Visitors

Oklahoma Day Visitors						
	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022
Tulsa area	20%	26%	26%	20%	21%	29%
Oklahoma City area	34%	28%	22%	21%	30%	28%
Norman	4%	8%	7%	10%	3%	6%
Stillwater	4%	1%	1%	2%	4%	6%
Bartlesville	3%	2%	4%	4%	3%	4%
Ardmore	4%	5%	4%	3%	3%	4%
Lawton	4%	4%	6%	7%	2%	3%
Muskogee	4%	6%	4%	6%	7%	2%

Oklahoma Overnight Visitors						
	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022
Oklahoma City area	36%	33%	36%	32%	30%	30%
Tulsa area	28%	25%	27%	23%	20%	18%
Bartlesville	3%	3%	3%	4%	3%	8%
Norman	8%	12%	7%	6%	9%	7%
Lawton	5%	5%	6%	3%	6%	5%
Stillwater	5%	6%	4%	5%	4%	5%
Ardmore	4%	7%	5%	4%	6%	5%
Muskogee	4%	4%	5%	4%	4%	5%

Destination Trends in In-State/Out-of-State Visitors

Trends in Top Oklahoma Destinations for Overnight and Day Visitors

Oklahoma Out-of-State Visitors						
	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022
Oklahoma City area	33%	33%	33%	21%	27%	29%
Tulsa area	23%	23%	26%	20%	19%	25%
Norman	6%	10%	7%	10%	8%	7%
Stillwater	4%	5%	4%	2%	4%	5%
Ardmore	5%	5%	7%	5%	4%	5%
Bartlesville	3%	2%	3%	3%	3%	4%
Muskogee	4%	3%	4%	5%	3%	3%
Lawton	5%	3%	6%	4%	6%	3%

Oklahoma In-State Visitors						
	CY 2017	CY 2018	CY 2019	CY 2020	CY 2021	CY 2022
Oklahoma City area	38%	29%	28%	27%	34%	28%
Tulsa area	28%	27%	28%	21%	23%	26%
Bartlesville	4%	3%	1%	6%	2%	7%
Norman	6%	11%	7%	8%	4%	6%
Stillwater	6%	3%	4%	5%	4%	5%
Lawton	3%	6%	6%	6%	3%	4%
Ardmore	3%	7%	2%	3%	7%	3%
Muskogee	4%	6%	5%	4%	7%	2%