



2014

TEXAS VISITOR PROFILE



Year-End 2014

Texas Tourism Visitor Profile



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Objectives of this report...

The objective of this report is to provide comprehensive and reliable travel information for tourism to and within Texas.

How to read this report

The data are presented in a user-friendly manner to allow decision makers to fully understand travel patterns in their market and to help them design specific strategies for their product.

The data are made available by D.K. Shifflet and Associates, Ltd, through its *DIRECTIONS* syndicated traveler tracking system. It provides an accurate representation of domestic travel patterns to Texas' Tourism Regions and MSAs.

Data

Texas Visitor Profile

Texas Executive Summary

Highlights of Visitors to Texas

- Texans generated 62% of Person-Days to the State; Non-Texans 38%
- Top 3 Texan origin DMAs (Dallas-Fort Worth, Houston, San Antonio); Non-Texan DMAs (New York, Oklahoma City, Los Angeles)
- Leisure travel represented 73.3% of Person-Days to the State; Vacation 22.5% and Non-Vacation 50.8%
- Business travel represented 26.7% of Person-Days to the State; Meetings 12.2% and Transient 14.5%
- Activity categories participated: Attractions 15.5%, Culture 23.8%, Family/Life Events 37.9%, Libation/Culinary 22.1%, Nature 14.1%, Outdoor Sports 10%, General 40.2%
- Average Party Size (Adults and Children) 1.76 persons
- Average Length of Stay was 2.19 days (overnight and days); 2.58 nights (overnight only).
- 81.9% traveled by Auto; 16% by Air
- Average distance traveled 431 miles
- Accommodation Type: Paid 56.4%; Non-Paid 41.7%; Other Overnight 1.8%
- Average Per Person Per Day Spending \$129.40
- Average Age 45.2 years
- Average Household Income \$88,980
- Employment: Employed 64.6%, Retired 16.2%, Not Employed 19.3%
- Marital Status: Married 66.1%, Never Married 22.2%, Divorced/Widowed 11.6%
- Children in Household: Yes 38.75%, No 61.3%

Texas Executive Summary

Volume/Share

The number of Person-Stays to the Hill Country Region was estimated at 28.40 million in 2014, and the volume of Person-Days was estimated at 57.16 million.

Texas Volume (millions)

Person-Days	Total	Leisure	Business
2014	517.73	379.85	137.89
2013	499.66	366.10	133.56
2012	479.01	347.66	131.34
Person-Stays	Total	Leisure	Business
2014	243.22	176.23	66.99
2013	233.49	170.45	63.04
2012	220.47	159.97	60.50

Texas Visitor Profile

TEXAS		TEXAS	
Top Origin DMAs (Person-Days)		Top Origin DMAs (Person-Days)	
In State DMAs		Out-of-State DMAs	
Total Texans (Intrastate)	62.0%	Total Non-Texans (Interstate)	38.0%
Dallas-Fort Worth	14.1%	New York, NY	2.1%
Houston	14.0%	Oklahoma City, OK	2.0%
San Antonio	7.6%	Los Angeles, CA	1.7%
Austin	6.4%	Tulsa, OK	1.3%
Harlingen-Weslaco-Brownsville-McAllen	3.6%	Phoenix, AZ	1.2%
Waco-Temple-Bryan	2.9%	Monroe, LA-El Dorado, AR	1.1%
Amarillo	2.3%	Chicago, IL	1.1%
Corpus Christi	1.8%	San Francisco-Oakland-San Jose, CA	1.0%
El Paso	1.7%	Lafayette, LA	0.9%
Tyler-Longview (Lufkin, Nacogdoches)	1.7%	Denver, CO	0.8%

Texas Visitor Profile

TEXAS		TEXAS	
Purpose of Stay (Person-Days)		Purpose of Stay (Person-Days)	
Total Leisure	73.3%	Total Business	26.7%
Vacation	22.5%	Meetings	12.2%
Getaway Weekend-Overnight	11.2%	Convention	5.7%
General Vacation-Overnight	9.2%	Seminar/Training	3.1%
Day Trip Vacation/Getaway	2.0%	Other Group Meetings	3.3%
Non-Vacation	50.8%	Transient	14.5%
See Friend/Relative	31.6%	Client Service	3.1%
Special Event	8.3%	Sales/Purchasing	2.1%
Convention/Show/Conference	2.3%	Government/Military	1.6%
Seminar/Class/Training (personal)	1.8%	Inspection/Audit	1.0%
Medical/Health Care	0.8%	Construction/Repair	1.0%
Other Personal	6.1%	Other Business	5.6%

Texas Visitor Profile

TEXAS		TEXAS	
Activities Summary (Stays)			
Attractions (Net)	15.5%	Nature (Net)	14.1%
Nightlife (bar, nightclub, etc.)	6.0%	Beach/Waterfront	6.4%
Zoo/Aquarium	3.2%	Parks (national/state, etc)	6.4%
Theme/Amusement/Water Parks	2.5%	Wildlife Viewing (birds, whales etc.)	2.0%
Culture (Net)	23.8%	Outdoor Sports (Net)	10.0%
Historic Sites	7.0%	Fishing	3.6%
Touring/Sightseeing	6.7%	Golfing	2.3%
Movies	6.5%	Biking	2.0%
Family/Life Events (Net)	37.9%	General (Net)	40.2%
Visit Friends/Relatives (general visit)	25.9%	Shopping	21.3%
Personal Special Event (Anniversary, Birthday)	5.7%	Business	12.1%
Holiday Celebration (Thanksgiving, July 4th etc.)	4.9%	Medical/Health/Doctor Visit	5.0%
Libation/Culinary (Net)	22.1%	Trip Party Composition (Trip-Days)	
Culinary/Dining Experience	21.4%	Avg. Party Size (Adults and Children)	1.76 persons
Winery/Distillery/Brewery Tours	1.3%	One Male Only	27.2%
		One Female Only	25.7%
		One Male and One Female	25.0%
		Two Male and Two Females	6.0%
		Three or More Adults	4.3%
		Adults with Children	11.7%

Texas Visitor Profile

TEXAS			TEXAS	
Length of Stay (Stays)			Accommodation Type (Person-Days)	
Average Length (Incl. Days)	2.19	days	Paid Accommodations	56.4%
Average Length (Overnight Only)	2.58	nights	Hotel/Motel	47.8%
	Day –Trips	44.2%	High-End	16.1%
	1-3 Nights	45.6%	Mid-Level	21.9%
	4-7 Nights	7.9%	Economy	7.8%
	8+ Nights	2.3%	Other Hotel/Motel	2.0%
Primary Mode of Transportation (Person-Days)			Non-Hotel/Motel	8.7%
	Air	16.0%	Non-Paid Accommodations	41.7%
	Auto Travel (Net)	81.9%	Other Overnight	1.8%
	Other Transportation (Net)	2.1%		
	Bus	1.3%		
	Train	0.4%		
	Other	0.4%		
Distance Traveled One-Way from Home (Person-Days)				
Average Distance Traveled	431	miles		
	250 Miles or Less	55.5%		
	251-500 Miles	15.7%		
	500-1000 Miles	13.2%		
	1001 Miles or More	15.6%		

Texas Visitor Profile

TEXAS		TEXAS	
Expenditure Summary (Person-Days)		Expenditure Summary (Person-Days)	
Transportation - Total	35.5%	Avg. Per Person Per Day Spending	\$129.40
Transportation - Excluding Airfare	24.0%	Transportation - Total	\$46.00
Transportation - Airfare	11.5%	Transportation - Excluding Airfare	\$31.10
Transportation - Rental Car	4.5%	Transportation - Airfare	\$89.60
Transportation - Other	19.5%	Transportation - Rental Car	\$45.90
Food	22.6%	Transportation - Other	\$25.20
Lodging - Total	18.1%	Food	\$29.20
Lodging - Room	16.2%	Lodging - Total	\$49.00
Lodging - Services	1.8%	Lodging - Room	\$48.20
Shopping	13.4%	Lodging - Services	\$8.00
Entertainment	7.8%	Shopping	\$17.30
Miscellaneous	2.6%	Entertainment	\$10.10
		Miscellaneous	\$3.40

Texas Visitor Profile

		TEXAS			TEXAS
Demographic Profile (Person-Days)					
Average Age		45.2	Employment		
	18-34 Years	31.1%		Employed	64.6%
	35-49 Years	28.0%		Retired	16.2%
	50-64 Years	26.1%		Not Employed	19.3%
	65+ Years	14.7%			
Marital Status					
Average HH Income (in \$1,000)		\$88,980		Married	66.1%
	Under \$25,000	11.4%		Never Married	22.2%
	\$25,000-\$49,999	23.5%		Divorced/Widowed	11.6%
	\$50,000-\$74,999	17.9%			
	\$75,000-\$99,999	15.3%	Children in Household		
	\$100,000-\$149,999	18.5%		Yes	38.7%
	\$150,000+	13.4%		No	61.3%

Appendix

Basic Units of Measure

The majority of data in the report is presented in travel person "days," also referred to as "Person-Days." The use of "days" accounts for the difference in party size and travel duration between travel parties. For example, each person does not spend the same amount of time at a travel destination. One person may stay for one day while another stays for eight days, each generating different revenue and economic impacts; therefore, "Person-Days" based data captures a fuller impact of a person's travel and represents a more comprehensive understanding of the competitive destinations market. "Person-Days" includes Day-Trips of over 50 miles one-way as well as overnight trips. Overnight trips are converted to "days" by adding to the number of nights a "day" factor.

"Person-Stays" represents the measure of the travel industry for which one person accounts for one trip regardless of trip length. "Person-Stays" is used to estimate travel volume. While "Person-Stays" does not capture the full impact of a person's travel, volume in "Person-Stays" is widely used in the industry. The estimated volume therefore allows comparison with other industry sources. "Person-Stays" includes Day-Trips of over 50 miles one-way and overnight trips.

"Trip-Days" represents the number of travel days spent in the market, regardless of the number of people in the travel party, and allows trips of longer length by any particular trip party type to have a greater weight than shorter trips. This measure is used to report trip party composition.

Volume/Share of Travel:

The volume of travel is estimated as the number of Person-Stays as well as the number of Person-Days at a specific destination. The share of travel is the percentage of total Person-Days to Texas accounted for by a specific destination. This information is helpful in assessing the relative volume of travel to specific destinations.

Designated Market Area (DMA):

A DMA is geographic area defined by Nielson Media Research, Inc. for what is commonly known as a television broadcast market. Every U.S. county is one and only one DMA. The data present a list of top Texas origin DMAs as well as Non-Texas origin DMAs. Some Texas DMAs are larger than 50 miles and include out-of-state counties. This information is very useful when evaluating advertising markets.

Purpose of Stay:

The primary reasons for visiting a destination are outlined. Business Person-Days are divided into Group Meetings (e.g., conventions/seminars) and Transient Business (e.g. sales/consulting). Leisure Person Days are segmented into Leisure Vacation (e.g., general vacation/getaway weekend) and Leisure Non-Vacation (e.g., visiting friends and relatives/special event). They are also segmented by activities that are grouped in various categories, such as: Attractions, Outdoor Sports, Nature, Culture, and Touring. Information on purpose of stay and activities is useful in understanding travel motivations and has direct implications for advertising messages.

Travel Party Composition/Length of Stay:

Trip Party Composition is defined as the makeup of people in the immediate travel party. Trip Party Compositions include the following segments: adults traveling with children (families), couples (one male/one female), one male alone, one female alone, or other adult combinations. The Length of Stay is distributed into Day-Trips, short trips (1-3 nights), medium trips (4-7 nights), and long trips (8+ nights). Information obtained from Trip Party Composition and Length of Stay helps profile the traveler. Both measures are strongly related to the purpose of stay. For instance, the Transient Business person (e.g., salesperson) generally travels alone and has a shorter trip length.

Expenditures:

Data on expenditures represent direct spending per person per day for six expenditure categories: transportation, food/drink, entertainment, shopping, accommodations, and other miscellaneous expenditures. Expenditure information is critical in assessing the direct economic impact of visitors.

Mode of Transportation/Distance Traveled:

The primary modes of transportation include air, car, bus, train, van/small truck, and camper/RV. The distance traveled (one-way) from home is categorized into short distances (less than 250 miles), medium distances (251 to 500 miles; 501 to 1,000 miles), and long distances (1,001 miles or more). This information is useful in deciding on advertising vehicles and communication reach.

Type of Accommodations:

The proportion of Day-Trips versus one or more nights travel is shown. Lodging types are distributed into paid accommodations (i.e., hotel/motel and non-hotel/motel) and non-paid accommodations. The strength of the hotel/motel market is compared to other paid and non-paid accommodations.

Demographic Profile:

Visitors' age, income, and employment status are key to determining the socioeconomic profile of visitors.

Statistical References

Confidence Interval

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage Findings in Report or Data Tables as follows:

Total Travel	Sample Size for 2014	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
Total Texas	9,434	0.2%	0.3%	0.4%	0.6%	0.8%

Research Methodology

DKSA's **TRAVEL PERFORMANCE/MonitorSM** is a comprehensive study measuring the travel behavior of US residents. DKSA contacts 50,000 distinct U.S. households monthly and has done so since 1991. DKSA is able to provide current behavior and long term trended analyses on a wide range of travel.

DKSA data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are Origin State, Age, Income, Education, Gender, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DKSA.

Both traveling and non-traveling households are surveyed each month enabling DKSA to generate the best estimate of travel incidence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases.

About DKSA

D.K. Shifflet & Associates Ltd. is the leading U.S. consumer travel research firm. DKSA is located in McLean, VA and has, for the last 27 years, provided the industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.

"Travel" is defined as either an overnight trip defined as going someplace, staying overnight and then returning home or as a day trip defined as a place away from home and back in the same day. Respondents report travel behavior for each stay of each trip; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of stay and activities, expenditures, mode of transportation, party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to ensure that the responses are not influenced by a pre-listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.