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# TEXAS TOURISM FY 2017 MARKETING PLAN

## *Travel Research*

### **OVERVIEW:**

Travel and tourism is a growing industry for Texas having outperformed the greater U.S. travel industry in both traveler spending and travel supported employment since 2000. In 2015, direct travel spending in Texas was estimated at \$68.7 billion. Travel spending in Texas directly supported 647,900 jobs, and an additional 487,500 jobs indirectly across many industry sectors. Some examples include leisure and hospitality, transportation, retail trade, services, finance, real estate, construction, insurance, and others. Travel spending generated an estimated \$10.4 billion in state (\$3.8 billion), local (\$2.4 billion) and federal (\$4.2 billion) tax revenues in 2015.

Travel Research program goals include tracking the health of the Texas travel industry and providing primary data and analysis on travel to Texas Tourism to inform and track marketing and advertising activities. Travel research staff also serve as a resource for communities interested in encouraging tourism development. Primary travel and tourism research is conducted by contracted research vendors, with reports published to [www.travel.texas.gov](http://www.travel.texas.gov) throughout the year. Please visit the website to view research reports available to Texas travel industry partners covering topics that include economic impact, domestic travel, international travel, and hotel performance.

- Economic Impact: Annual report of the economic impact of travel to Texas primarily reports direct travel spending, employment, earnings, taxes generated for the state, seven tourism regions, MSA's, counties and select cities. Additional breakouts include visitor spending by accommodation category, visitor spending by commodity purchased, industry earnings and employment generated by travel spending. Spending, earnings, and employment data is also provided for Texas legislative districts. Additional analysis examines secondary employment and earnings impacts as well as travels impact on the Texas Gross State Product.
- Domestic Travel: Reports provide volume and share of travel, top origin designated marketing areas, purpose of stay, trip party composition/length of stay, trip expenditures, mode of transportation, type of accommodation, and demographic profiles for all seven Texas Tourism regions and the metropolitan areas that comprise each region.
- International Travel: Estimates for travel to Texas, spending and visitor profile information is available for top international markets such as: Mexico, Canada, the United Kingdom, Germany, China, Australia and Brazil.
- Hotel Performance: Estimates for hotel roomnights sold, hotel revenues and occupancy rates are available for the state, MSA's, counties and cities across Texas in 10-year trend reports that allow for tracking of estimates over time.



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In addition to the research areas listed above, the Travel Research section conducts advertising effectiveness studies to measure the return on investment of Texas Tourism promotions. The latest estimates through Quarter 3 FY16 show that Texas Tourism advertising and promotion influenced 3.2 million non-Texan leisure trips, \$4.9 billion in direct travel spending and \$295.5 million in state taxes for an ROI of \$7.92 in state taxes for each dollar invested.

The following table lists the research plan of work for FY 2017, highlighting planned research services and primary data sources. Research estimates are used throughout the marketing plan to report calendar year 2015 travel trends. Forecasting data provided by the U.S. Department of Commerce and Tourism Economics for the US and Texas is included to assist with long-term market planning and are current as of June 2016.

### Travel Research Plan of Work (FY17)

RESEARCH SERVICES	DATA SOURCES
Economic Impact	Dean Runyan and Associates
Domestic Travel	D.K. Shifflet & Associates
International Travel	TBD
Hotel Performance	TBD
Advertising Effectiveness & Accountability	Strategic Marketing and Research Insights
Other Professional Services, Information Services or Subscriptions or Memberships	U.S. Department of Commerce Statistic Canada Tourism Economics London Publications U.S. Travel Association Travel and Tourism Research Association