# 2013 TEXAS TOURISM REGION AND MSA VISITOR PROFILE

MSA:

Austin-Round Rock

# HILL COUNTRY REGION

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**D**

DIRECTIONS®

# Year-End 2013 Texas Tourism Regions and MSA Profile

# HILL COUNTRY REGION

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The objective of this report is to provide comprehensive and reliable travel information for each of Texas' seven Tourism Regions and individual Metropolitan Statistical Areas (MSAs) within each Tourism Region. An MSA is a geographical region defined by the U.S. Office of Management and Budget (OMB) as one or more counties having a large central population area and being related to the central population area by economic, geographic, and other factors. Not every Texas county is in an MSA.

[ *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

Hill Country Tourism Region Profile

# Hill Country Tourism Region
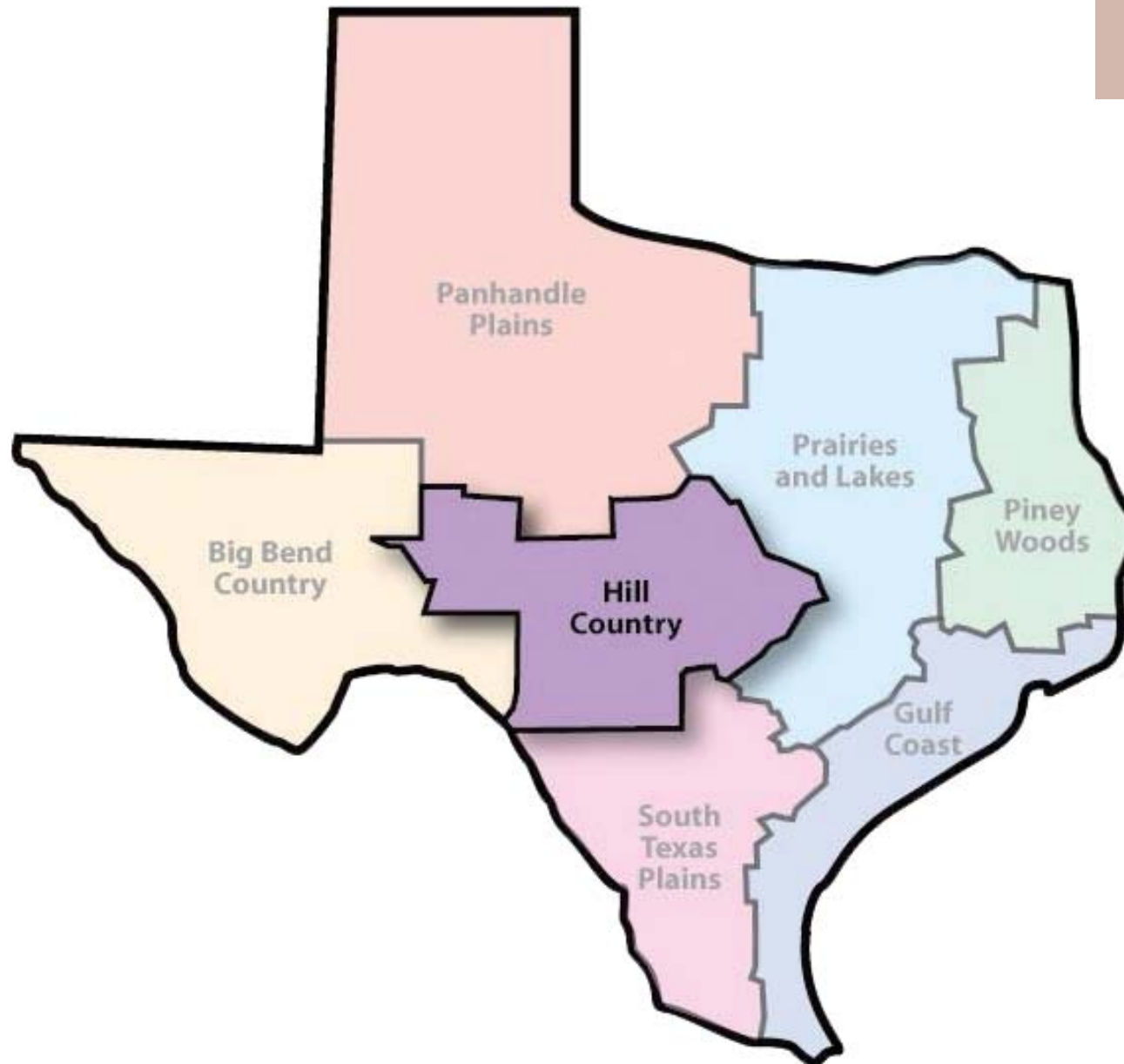
# Hill Country Region Executive Summary

## Highlights of Visitors to the Hill Country Region

- Texans generated 72.9% of Person-Days to the Hill Country Region; Non-Texans 27.1%

- Top 3 Texan origin DMAs (Dallas-Fort Worth, Houston, San Antonio); Non-Texan DMAs (San Francisco-Oakland-San Jose, New York, Los Angeles)

- Leisure travel represented 69.4% of Person-Days to the Hill Country Region; Vacation 19.6% and Non-Vacation 49.8%

- Business travel represented 30.6% of Person-Days to the Hill Country Region; Meetings 14.8% and Transient 15.8%

- Activity categories participated: Attractions 14.9%, Culture 29%, Family/Life Events 40%, Libation/Culinary 27.2%, Nature 11.8%, Outdoor Sports 12.1%, General 35.6%

- Average Party Size (Adults and Children) 1.8 persons

- Average Length of Stay was 1.91 days (overnight and days); 2.39 nights (overnight only).

- 81.9% traveled by Auto; 16% by Air

- Average distance traveled 385 miles

- Accommodation Type: Paid 61.6%; Non-Paid 36.7%; Other Overnight 1.7%

- Average Per Person Per Day Spending $134.70

- Average Age 46.5 years

- Average Household Income $93,236

- Employment: Employed 69.8%, Retired 17.4%, Not Employed 12.8%

- Marital Status: Married 61.5%, Never Married 25.7%, Divorced/Widowed 12.8%

- Children in Household: Yes 32.2%, No 67.8%

# Hill Country Region Executive Summary

## Volume/Share

The Hill Country Tourism Region contains the following MSAs:
Austin-Round Rock

The number of Person-Stays to the Hill Country Region was estimated at 27.16 million in 2013, and the volume of Person-Days was estimated at 55.24 million.

The Hill Country Region's share of total Person-Days to Texas ranked 4 out of the 7 Texas Tourism Regions.

### Hill Country Volume (millions)

| Person-Days | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 55.24 | 39.19 | 16.05 |
| 2012 | 53.73 | 37.66 | 16.07 |
| 2011 | 51.55 | 36.11 | 15.44 |

| Person-Stays | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 27.16 | 18.85 | 8.31 |
| 2012 | 26.13 | 17.90 | 8.22 |
| 2011 | 24.42 | 16.72 | 7.75 |

### Hill Country Share of Texas Travel

| Person-Days | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 10.5% | 10.2% | 11.3% |
| 2012 | 10.3% | 9.9% | 10.6% |
| 2011 | 10.8% | 10.7% | 11.0% |

# Hill Country Tourism Region

| | | REGION | TEXAS | | REGION | TEXAS |
|---|---|---|---|---|---|---|
| **Top Origin DMAs** (Person-Days) | | | | **Top Origin DMAs** (Person-Days) | | |
| **In State DMAs** | | | | **Out-of-State DMAs** | | |
| **Total Texans (Intrastate)** | | 72.9% | 67.5% | **Total Non-Texans (Interstate)** | 27.1% | 32.5% |
| | Dallas-Fort Worth | 18.4% | 16.3% | San Francisco-Oakland-San Jose, CA | 2.0% | 0.5% |
| | Houston | 15.7% | 14.5% | New York, NY | 1.5% | 1.3% |
| | San Antonio | 12.9% | 7.6% | Los Angeles, CA | 1.2% | 1.9% |
| | Austin | 10.0% | 6.7% | Albuquerque-Santa Fe, NM | 1.0% | 1.1% |
| | Harlingen-Weslaco-Brownsville-McAllen | 3.1% | 5.1% | Denver, CO | 1.0% | 0.5% |
| | Waco-Temple-Bryan | 2.8% | 3.9% | Atlanta, GA | 0.9% | 0.9% |
| | Corpus Christi | 2.4% | 2.5% | Seattle-Tacoma, WA | 0.8% | 0.2% |
| | Laredo | 1.4% | 0.6% | St. Louis, MO | 0.8% | 0.6% |

# Hill Country Tourism Region

| | REGION | TEXAS | | REGION | TEXAS |
|---|---|---|---|---|---|
| **Purpose of Stay (Person-Days)** | | | **Purpose of Stay (Person-Days)** | | |
| **Total Leisure** | 69.4% | 71.0% | **Total Business** | 30.6% | 29.0% |
| **Vacation** | 19.6% | 20.7% | **Meetings** | 14.8% | 11.3% |
| Getaway Weekend-Overnight | 11.5% | 10.8% | Convention | 4.1% | 3.2% |
| General Vacation-Overnight | 6.0% | 8.3% | Seminar/Training | 6.7% | 4.8% |
| Day Trip Vacation/Getaway | 2.1% | 1.7% | Other Group Meetings | 4.0% | 3.3% |
| **Non-Vacation** | 49.8% | 50.2% | **Transient** | 15.8% | 17.7% |
| See Friend/Relative | 27.2% | 30.3% | Client Service | 2.3% | 3.5% |
| Special Event | 11.0% | 8.4% | Inspect Audit | 0.7% | 1.2% |
| Medical/Health Care | 1.2% | 2.1% | Construction/Repair | 2.7% | 2.3% |
| Convention/Show/Conference | 2.3% | 1.6% | Sales/Purchasing | 3.3% | 3.4% |
| Seminar, Class, Training (Personal) | 1.0% | 0.5% | Government/Military | 1.4% | 1.2% |
| Other Personal | 7.1% | 7.3% | Other Business | 5.3% | 6.2% |

# Hill Country Tourism Region

| | REGION | TEXAS | | REGION | TEXAS | |
|---|---|---|---|---|---|---|
| **Activities Summary (Stays)** | | | | | | |
| **Attractions (Net)** | 14.9% | 15.3% | **Nature (Net)** | 11.8% | 13.7% | |
| Nightlife (bar, nightclub, etc.) | 10.5% | 7.1% | Parks (national/state, etc) | 6.9% | 5.7% | |
| Amateur Sports (attend/participate) | 1.8% | 2.2% | Beach/Waterfront | 3.2% | 6.7% | |
| Theme/Amusement/Water Parks | 1.4% | 2.4% | Camping | 1.9% | 2.5% | |
| **Culture (Net)** | 29.0% | 22.8% | **Outdoor Sports (Net)** | 12.1% | 8.6% | |
| Historic Sites | 9.7% | 6.6% | Hiking | 3.8% | 2.0% | |
| Touring/Sightseeing | 8.7% | 6.0% | Fishing | 2.7% | 3.0% | |
| Movies | 8.5% | 8.2% | Golfing | 2.3% | 1.4% | |
| **Family/Life Events (Net)** | 40.0% | 37.0% | **General (Net)** | 35.6% | 37.0% | |
| Visit Friends/Relatives (general visit) | 30.2% | 28.1% | Shopping | 22.4% | 20.0% | |
| Personal Special Event (Anniversary, Birthday) | 4.5% | 3.7% | Business | 4.3% | 8.8% | |
| Holiday Celebration (Thanksgiving, July 4th etc.) | 3.9% | 4.9% | Other Activity | 4.2% | 3.1% | |
| **Libation/Culinary (Net)** | 27.2% | 21.2% | **Trip Party Composition (Trip-Days)** | | | |
| Culinary/Dining Experience | 26.2% | 20.8% | *Avg. Party Size (Adults and Children)* | **1.80** | **1.79** | *persons* |
| Winery/Distillery/Brewery Tours | 2.8% | 1.0% | One Male Only | 29.5% | 31.2% | |
| | | | One Female Only | 22.3% | 21.6% | |
| | | | One Male and One Female | 26.1% | 24.0% | |
| | | | Two Male and Two Females | 6.3% | 5.8% | |
| | | | Three or More Adults | 7.6% | 5.0% | |
| | | | Adults with Children | 8.2% | 12.4% | |

# Hill Country Tourism Region

| | REGION | TEXAS | | Accommodation Type (Person-Days) | | REGION | TEXAS |
|---|---|---|---|---|---|---|---|
| **Length of Stay (Stays)** | | | | | | | |
| *Average Length (Incl. Days)* | **1.91** | **2.03** | *days* | **Paid Accommodations** | | 61.6% | 56.7% |
| *Average Length (Overnight Only)* | **2.39** | **2.52** | *nights* | Hotel/Motel | | 49.7% | 48.6% |
| Day –Trips | 51.6% | 49.2% | | | High-End | 20.8% | 17.2% |
| 1-3 Nights | 39.8% | 41.3% | | | Mid-Level | 19.5% | 20.8% |
| 4-7 Nights | 7.2% | 7.7% | | | Economy | 7.8% | 8.1% |
| 8+ Nights | 1.4% | 1.8% | | Other Hotel/Motel | | 1.6% | 2.6% |
| **Primary Mode of Transportation (Person-Days)** | | | | Non-Hotel/Motel | | 11.9% | 8.1% |
| **Air** | 16.0% | 14.5% | | **Non-Paid Accommodations** | | 36.7% | 40.7% |
| **Auto Travel (Net)** | 81.9% | 83.5% | | **Other Overnight** | | 1.7% | 2.6% |
| **Other Transportation (Net)** | 2.1% | 2.0% | | | | | |
| Bus | 1.8% | 1.5% | | | | | |
| Train | 0.2% | 0.3% | | | | | |
| Other | 0.1% | 0.3% | | | | | |
| **Distance Traveled One-Way from Home (Person-Days)** | | | | | | | |
| *Average Distance Traveled* | 385 | 383 | *miles* | | | | |
| 250 Miles or Less | 66.3% | 59.4% | | | | | |
| 251-500 Miles | 9.3% | 16.0% | | | | | |
| 500-1000 Miles | 9.8% | 12.6% | | | | | |
| 1001 Miles or More | 14.6% | 12.1% | | | | | |

# Hill Country Tourism Region

| | REGION | TEXAS | | REGION | TEXAS |
|---|---|---|---|---|---|
| **Expenditure Summary (Person-Days)** | | | **Category Expenditure (Person-Days)** | | |
| **Avg. Per Person Per Day Spending** | $134.70 | $125.10 | | | |
| **Transportation - Total** | 35.1% | 37.0% | **Transportation - Total** | $47.30 | $46.40 |
| Transportation - Excluding Airfare | 24.1% | 25.6% | Transportation - Excluding Airfare | $32.50 | $32.00 |
| Transportation - Airfare | 11.0% | 11.5% | Transportation - Airfare | $85.60 | $96.30 |
| Transportation - Rental Car | 4.0% | 4.6% | Transportation - Rental Car | $44.50 | $44.90 |
| Transportation - Other | 20.2% | 21.0% | Transportation - Other | $27.20 | $26.30 |
| **Food** | 23.4% | 22.3% | **Food** | $31.50 | $27.90 |
| **Lodging - Total** | 18.3% | 17.3% | **Lodging - Total** | $50.00 | $45.90 |
| Lodging - Room | 15.6% | 15.6% | Lodging - Room | $46.30 | $45.90 |
| Lodging - Services | 2.7% | 1.7% | Lodging - Services | $10.10 | $6.70 |
| **Shopping** | 12.7% | 12.8% | **Shopping** | $17.10 | $16.00 |
| **Entertainment** | 7.2% | 7.7% | **Entertainment** | $9.80 | $9.70 |
| **Miscellaneous** | 3.3% | 2.8% | **Miscellaneous** | $4.40 | $3.50 |

# Hill Country Tourism Region

| | REGION | TEXAS | | | REGION | TEXAS |
|---|---|---|---|---|---|---|
| **Demographic Profile** (Person-Days) | | | | | | |
| ***Average Age*** | **46.5** | **45.2** | **Employment** | | | |
| 18-34 Years | 28.8% | 31.1% | Employed | | 69.8% | 67.7% |
| 35-49 Years | 26.8% | 27.9% | Retired | | 17.4% | 16.1% |
| 50-64 Years | 25.1% | 25.0% | Not Employed | | 12.8% | 16.2% |
| 65+ Years | 19.4% | 16.0% | | | | |
| | | | **Marital Status** | | | |
| ***Average HH Income (in $1,000)*** | $93,236 | $88,480 | Married | | 61.5% | 64.0% |
| Under $25,000 | 10.5% | 11.9% | Never Married | | 25.7% | 24.1% |
| $25,000-$49,999 | 17.5% | 21.5% | Divorced/Widowed | | 12.8% | 11.9% |
| $50,000-$74,999 | 22.9% | 20.6% | | | | |
| $75,000-$99,999 | 16.5% | 15.5% | **Children in Household** | | | |
| $100,0000+ | 32.6% | 30.5% | Yes | | 32.2% | 39.6% |
| | | | No | | 67.8% | 60.4% |

# Austin-Round Rock, TX MSA

# Austin-Round Rock, TX MSA Executive Summary

## Highlights of Visitors to the Austin-Round Rock MSA

- Texans generated 69.6% of Person-Days to the Austin-Round Rock MSA; Non-Texans 30.4%
- Top 3 Texan origin DMAs (Dallas-Fort Worth, Houston, San Antonio); Non-Texan DMAs (San Francisco-Oakland-San Jose, New York, Los Angeles)
- Leisure travel represented 65.1% of Person-Days to the Austin-Round Rock MSA; Vacation 15.3% and Non-Vacation 49.8%
- Business travel represented 34.9% of Person-Days to the Austin-Round Rock MSA; Meetings 17.6% and Transient 17.3%
- Activity categories participated: Attractions 16.9%, Culture 27.4%, Family/Life Events 38.8%, Libation/Culinary 25.4%, Nature 8.7%, Outdoor Sports 10.2%, General 35.2%
- Average Party Size (Adults and Children) 1.73 persons
- Average Length of Stay was 1.93 days (overnight and days); 2.38 nights (overnight only).
- 79.0% traveled by Auto; 18.5% by Air
- Average distance traveled 419 miles
- Accommodation Type: Paid 59.1%; Non-Paid 39.3%; Other Overnight 1.6%
- Average Per Person Per Day Spending $138.70
- Average Age 44.7 years
- Average Household Income $93,003
- Employment: Employed 74.1%, Retired 13.1%, Not Employed 12.8%
- Marital Status: Married 59.7%, Never Married 28.6%, Divorced/Widowed 11.7%
- Children in Household: Yes 33.8%, No 66.2%

# Austin-Round Rock, TX MSA Executive Summary

## Volume/Share

The number of Person-Stays to the Austin-Round Rock MSA was estimated at 21.54 million in 2013, and the volume of Person-Days was estimated at 43.69 million.

The Austin-Round Rock MSA's share of total Person-Days to Texas ranked 4 out of 26 Texas MSAs.

**Austin-Round Rock, TX MSA Volume (millions)**

| Person-Days | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 43.69 | 29.17 | 14.53 |
| 2012 | 42.65 | 28.19 | 14.47 |
| 2011 | 40.57 | 26.74 | 13.82 |

| Person-Stays | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 21.54 | 14.09 | 7.45 |
| 2012 | 20.59 | 13.25 | 7.33 |
| 2011 | 19.17 | 12.28 | 6.88 |

**Austin-Round Rock, TX MSA Share of Texas Travel**

| Person-Days | Total | Leisure | Business |
|---|---|---|---|
| 2013 | 8.7% | 8.0% | 10.5% |
| 2012 | 8.3% | 7.4% | 9.9% |
| 2011 | 8.6% | 7.8% | 10.7% |

# Austin-Round Rock MSA

| | MSA | TEXAS | | MSA | TEXAS |
|---|---|---|---|---|---|
| **Top Origin DMAs (Person-Days)** | | | **Top Origin DMAs (Person-Days)** | | |
| **In State DMAs** | | | **Out-of-State DMAs** | | |
| **Total Texans (Intrastate)** | 69.6% | 67.5% | **Total Non-Texans (Interstate)** | 30.4% | 32.5% |
| Dallas-Fort Worth | 17.0% | 16.3% | San Francisco-Oakland-San Jose, CA | 2.5% | 0.5% |
| Houston | 16.3% | 14.5% | New York, NY | 1.9% | 1.3% |
| San Antonio | 10.8% | 7.6% | Los Angeles, CA | 1.3% | 1.9% |
| Austin | 9.5% | 6.7% | Atlanta, GA | 1.1% | 0.9% |
| Harlingen-Weslaco-Brownsville-McAllen | 3.8% | 5.1% | Seattle-Tacoma, WA | 1.0% | 0.2% |
| Waco-Temple-Bryan | 2.5% | 3.9% | St. Louis, MO | 1.0% | 0.6% |
| Corpus Christi | 2.2% | 2.5% | Washington, DC (Hagerstown, MD) | 1.0% | 0.6% |
| Laredo | 1.7% | 0.6% | Albuquerque-Santa Fe, NM | 0.9% | 1.1% |

# Austin-Round Rock MSA

| Purpose of Stay (Person-Days) | MSA | TEXAS | Purpose of Stay (Person-Days) | MSA | TEXAS |
|---|---|---|---|---|---|
| **Total Leisure** | 65.1% | 71.0% | **Total Business** | 34.9% | 29.0% |
| **Vacation** | 15.3% | 20.7% | **Meetings** | 17.6% | 11.3% |
| Getaway Weekend-Overnight | 9.1% | 10.8% | Convention | 5.0% | 3.2% |
| General Vacation-Overnight | 4.3% | 8.3% | Seminar/Training | 7.9% | 4.8% |
| Day Trip Vacation/Getaway | 1.9% | 1.7% | Other Group Meetings | 4.7% | 3.3% |
| **Non-Vacation** | 49.8% | 50.2% | **Transient** | 17.3% | 17.7% |
| See Friend/Relative | 29.7% | 30.3% | Client Service | 2.8% | 3.5% |
| Special Event | 8.7% | 8.4% | Inspect Audit | 0.9% | 1.2% |
| Medical/Health Care | 1.2% | 2.1% | Construction/Repair | 3.3% | 2.3% |
| Convention/Show/Conference | 2.6% | 1.6% | Sales/Purchasing | 3.4% | 3.4% |
| Seminar, Class, Training (Personal) | 1.3% | 0.5% | Government/Military | 1.6% | 1.2% |
| Other Personal | 6.3% | 7.3% | Other Business | 5.4% | 6.2% |

# Austin-Round Rock MSA

| | MSA | TEXAS | | MSA | TEXAS | |
|---|---|---|---|---|---|---|
| **Activities Summary (Stays)** | | | | | | |
| **Attractions (Net)** | 16.9% | 15.3% | **Nature (Net)** | 8.7% | 13.7% | |
| Nightlife (bar, nightclub, etc.) | 11.9% | 7.1% | Parks (national/state, etc) | 4.9% | 5.7% | |
| Amateur Sports (attend/participate) | 2.1% | 2.2% | Beach/Waterfront | 2.5% | 6.7% | |
| Theme/Amusement/Water Parks | 1.7% | 2.4% | Wildlife Viewing (birds, whales etc.) | 1.4% | 1.5% | |
| **Culture (Net)** | 27.4% | 22.8% | **Outdoor Sports (Net)** | 10.2% | 8.6% | |
| Historic Sites | 9.3% | 6.6% | Hiking | 2.7% | 2.0% | |
| Movies | 7.9% | 8.2% | Fishing | 2.0% | 3.0% | |
| Touring/Sightseeing | 7.7% | 6.0% | Golfing | 2.0% | 1.4% | |
| **Family/Life Events (Net)** | 38.8% | 37.0% | **General (Net)** | 35.2% | 37.0% | |
| Visit Friends/Relatives (general visit) | 29.5% | 28.1% | Shopping | 22.7% | 20.0% | |
| Personal Special Event (Anniversary, Birthday) | 4.5% | 3.7% | Business | 5.0% | 8.8% | |
| Holiday Celebration (Thanksgiving, July 4th etc.) | 3.4% | 4.9% | Other Activity | 4.2% | 3.1% | |
| **Libation/Culinary (Net)** | 25.4% | 21.2% | **Trip Party Composition (Trip-Days)** | | | |
| Culinary/Dining Experience | 24.7% | 20.8% | *Avg. Party Size (Adults and Children)* | **1.73** | **1.79** | *persons* |
| Winery/Distillery/Brewery Tours | 1.5% | 1.0% | One Male Only | 33.0% | 31.2% | |
| | | | One Female Only | 22.7% | 21.6% | |
| | | | One Male and One Female | 23.2% | 24.0% | |
| | | | Two Male and Two Females | 6.1% | 5.8% | |
| | | | Three or More Adults | 7.3% | 5.0% | |
| | | | Adults with Children | 7.7% | 12.4% | |

# Austin-Round Rock MSA

| | MSA | TEXAS | | Accommodation Type (Person-Days) | | MSA | TEXAS |
|---|---|---|---|---|---|---|---|
| **Length of Stay (Stays)** | | | | **Accommodation Type (Person-Days)** | | | |
| *Average Length (Incl. Days)* | 1.93 | 2.03 | *days* | **Paid Accommodations** | | 59.1% | 56.7% |
| *Average Length (Overnight Only)* | 2.38 | 2.52 | *nights* | Hotel/Motel | | 54.6% | 48.6% |
| Day –Trips | 50.2% | 49.2% | | | High-End | 24.8% | 17.2% |
| 1-3 Nights | 41.2% | 41.3% | | | Mid-Level | 20.6% | 20.8% |
| 4-7 Nights | 7.1% | 7.7% | | | Economy | 8.0% | 8.1% |
| 8+ Nights | 1.5% | 1.8% | | Other Hotel/Motel | | 1.2% | 2.6% |
| **Primary Mode of Transportation (Person-Days)** | | | | Non-Hotel/Motel | | 4.5% | 8.1% |
| Air | 18.5% | 14.5% | | **Non-Paid Accommodations** | | 39.3% | 40.7% |
| **Auto Travel (Net)** | 79.0% | 83.5% | | **Other Overnight** | | 1.6% | 2.6% |
| **Other Transportation (Net)** | 2.6% | 2.0% | | | | | |
| Bus | 2.2% | 1.5% | | | | | |
| Train | 0.3% | 0.3% | | | | | |
| Other | 0.1% | 0.3% | | | | | |
| **Distance Traveled One-Way from Home (Person-Days)** | | | | | | | |
| *Average Distance Traveled* | 419 | 383 | *miles* | | | | |
| 250 Miles or Less | 62.8% | 59.4% | | | | | |
| 251-500 Miles | 9.6% | 16.0% | | | | | |
| 500-1000 Miles | 11.0% | 12.6% | | | | | |
| 1001 Miles or More | 16.6% | 12.1% | | | | | |

# Austin-Round Rock MSA

| Expenditure Summary (Person-Days) | MSA | TEXAS | Category Expenditure (Person-Days) | MSA | TEXAS |
|---|---|---|---|---|---|
| Avg. Per Person Per Day Spending | $138.70 | $125.10 | | | |
| Transportation - Total | 36.1% | 37.0% | Transportation - Total | $50.00 | $46.40 |
| Transportation - Excluding Airfare | 24.0% | 25.6% | Transportation - Excluding Airfare | $33.30 | $32.00 |
| Transportation - Airfare | 12.1% | 11.5% | Transportation - Airfare | $86.00 | $96.30 |
| Transportation - Rental Car | 4.4% | 4.6% | Transportation - Rental Car | $44.90 | $44.90 |
| Transportation - Other | 19.6% | 21.0% | Transportation - Other | $27.10 | $26.30 |
| Food | 23.0% | 22.3% | Food | $31.90 | $27.90 |
| Lodging - Total | 18.4% | 17.3% | Lodging - Total | $51.80 | $45.90 |
| Lodging - Room | 15.8% | 15.6% | Lodging - Room | $48.50 | $45.90 |
| Lodging - Services | 2.5% | 1.7% | Lodging - Services | $10.20 | $6.70 |
| Shopping | 12.1% | 12.8% | Shopping | $16.70 | $16.00 |
| Entertainment | 7.1% | 7.7% | Entertainment | $9.90 | $9.70 |
| Miscellaneous | 3.3% | 2.8% | Miscellaneous | $4.60 | $3.50 |

# Austin-Round Rock MSA

| | MSA | TEXAS | | | MSA | TEXAS |
|---|---|---|---|---|---|---|
| **Demographic Profile** (Person-Days) | | | | | | |
| *Average Age* | 44.7 | 45.2 | **Employment** | | | |
| 18-34 Years | 32.5% | 31.1% | Employed | | 74.1% | 67.7% |
| 35-49 Years | 27.6% | 27.9% | Retired | | 13.1% | 16.1% |
| 50-64 Years | 24.5% | 25.0% | Not Employed | | 12.8% | 16.2% |
| 65+ Years | 15.4% | 16.0% | | | | |
| | | | **Marital Status** | | | |
| *Average HH Income (in $1,000)* | $93,003 | $88,480 | Married | | 59.7% | 64.0% |
| Under $25,000 | 10.9% | 11.9% | Never Married | | 28.6% | 24.1% |
| $25,000-$49,999 | 17.7% | 21.5% | Divorced/Widowed | | 11.7% | 11.9% |
| $50,000-$74,999 | 23.5% | 20.6% | | | | |
| $75,000-$99,999 | 15.2% | 15.5% | **Children in Household** | | | |
| $100,0000+ | 32.6% | 30.5% | Yes | | 33.8% | 39.6% |
| | | | No | | 66.2% | 60.4% |

# Appendix

# User's Guide

## 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.

# User's Guide

**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.

# User's Guide

**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 2013 | 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% |
| Hill Country Region | 1,906 | 0.4% | 0.7% | 1.0% | 1.4% | 1.9% |
| Austin-Round Rock, TX MSA | 1,665 | 0.4% | 0.7% | 1.1% | 1.5% | 2.0% |

# Research Methodology

DKSA's **TRAVEL *PERFORMANCE*/*Monitor*<sup>SM</sup> 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.

"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.

## 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.