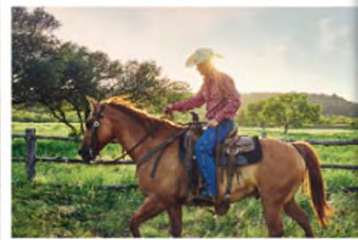


Travel Texas

Office of the Governor
Economic Development & Tourism Division



TRAVEL  TEXAS

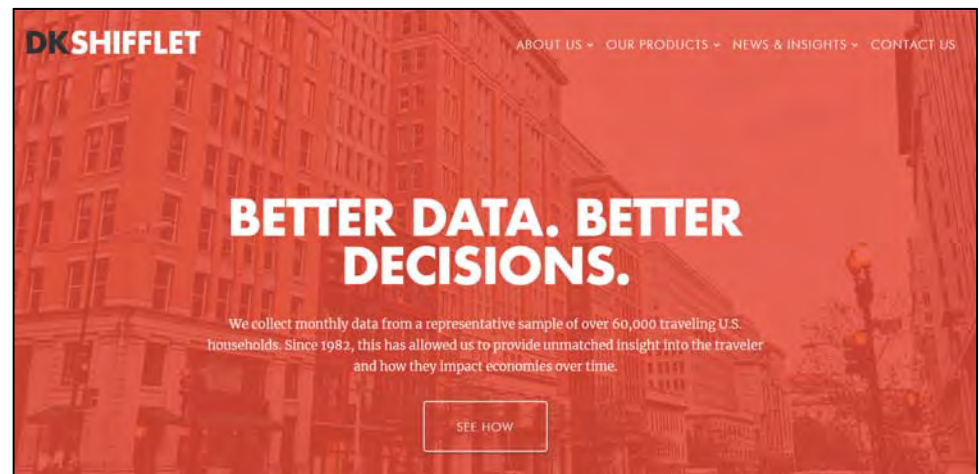
Travel Texas Research

- Domestic Visitor and Profile
(includes 2017 Region and MSA Visitor Profile reports)
- International Visitor and Profile
- Hotel Performance
- Economic Impact
- Advertising Effectiveness



2017 Region and MSA Visitor Profile Reports

- Data from D.K. Shifflet
- Domestic travel only
- Visitor volume and visitor profile information provided for all 27 Metropolitan Statistical Areas or Metropolitan Divisions in Texas
- **NEW IN 2017:** Visitor profile data ran in person-stays weight

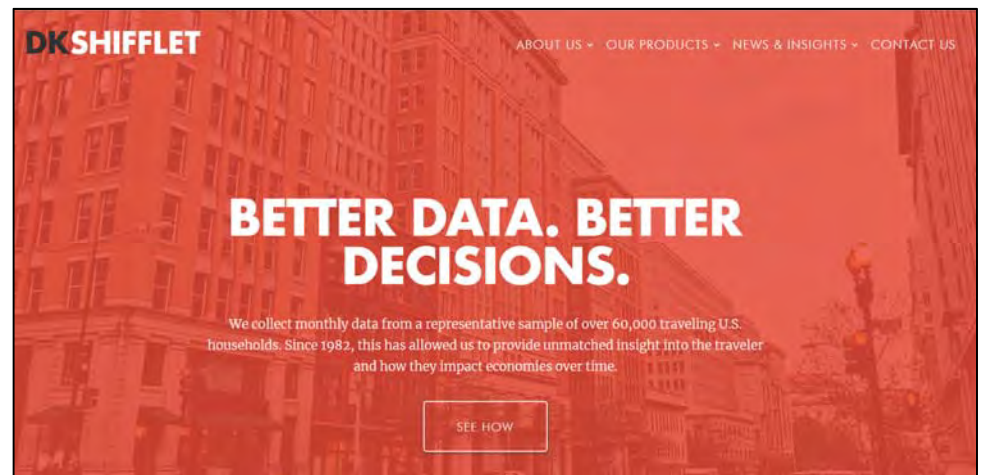


Visitor Volume



Methodology

- 50,000 U.S. Households contacted per month
- Both traveling and non-traveling households surveyed
- Overlapping monthly collection of previous 3-mos travel

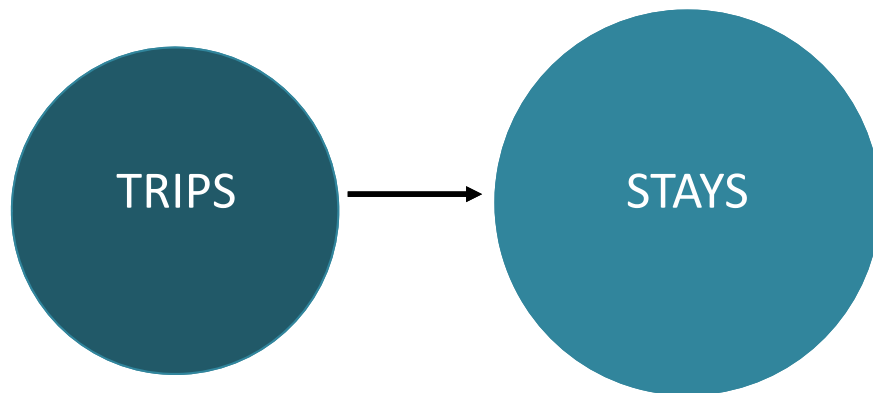


DESTINATION VISITOR COUNTS - WHICH METRICS WORK BEST FOR YOU

Cheryl Schutz breaks down the basic metrics for counting destination visitors.



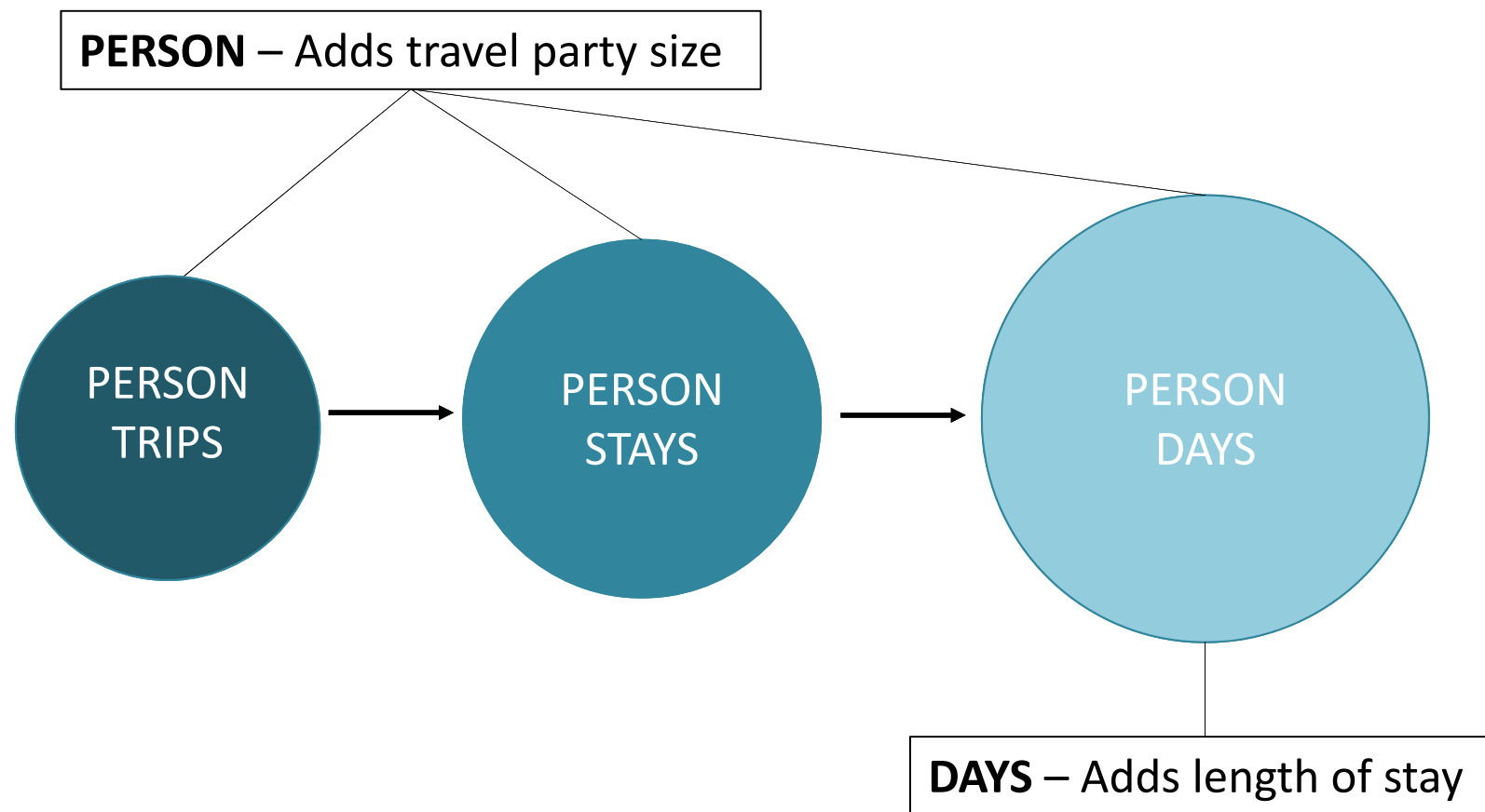
<https://www.dkshifflet.com/destination-visitor-counts-which-metrics-work-best-you>



TRIP – Unique visits to a destination (e.g. Texas)

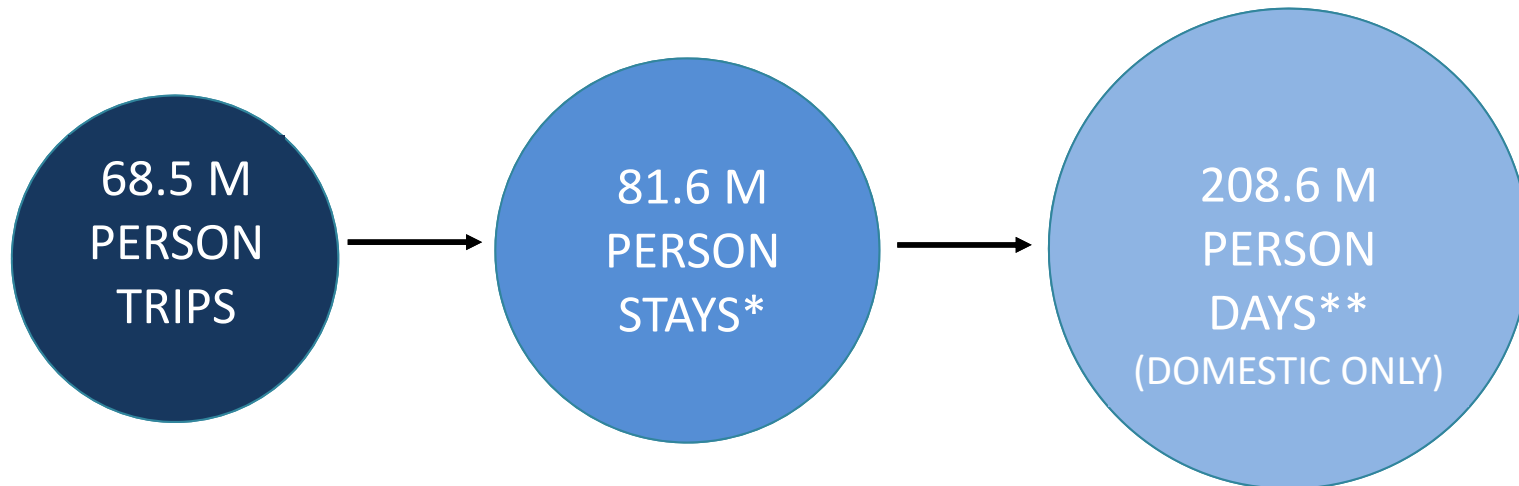
STAY – All destination visits on a trip (e.g. two city visits on a Texas trip equals two stays)

Source: Travel Texas adapted from D.K. Shifflet & Associates



Source: Travel Texas adapted from D.K. Shifflet & Associates

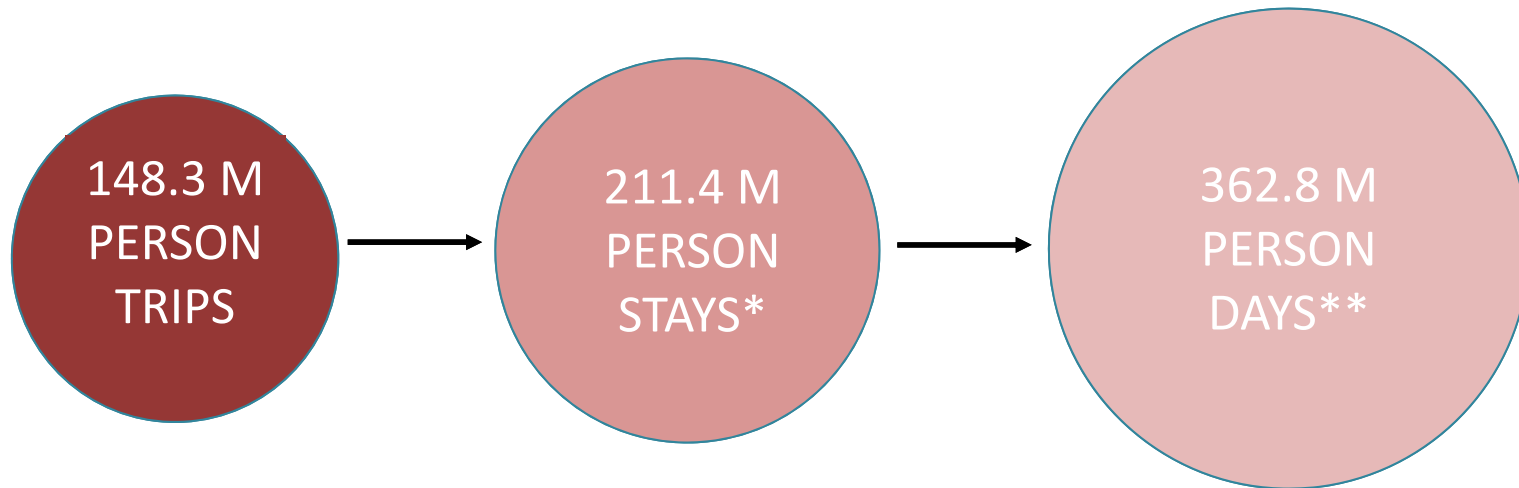
Non-Resident Visitor Volume to Texas (2017p)



Notes: *Person-Stays Day Trips (17%), **Person-Days Day Trips (5%)

Source: Travel Texas; D.K. Shifflet & Associates, Travel Market Insights, SMARInsights

Resident Visitor Volume within Texas (2017p)



Notes: *Person-Stays Day Trips (53%), **Person-Days Day Trips (23%)

Source: Travel Texas; D.K. Shifflet & Associates

Austin-Round Rock, TX MSA Executive Summary

Volume/Share

The number of Person-Stays to the Austin-Round Rock MSA was estimated at 27.41 million in 2017, and the volume of Person-Days was estimated at 53.58 million.

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

Austin-Round Rock, TX MSA Volume (millions)

| Person-Days | Total | Leisure | Business |
|--------------|-------|---------|----------|
| 2017 | 53.58 | 37.20 | 16.39 |
| 2016 | 50.27 | 34.43 | 15.84 |
| 2015 | 48.18 | 32.58 | 15.59 |
| 2014 | 45.55 | 30.54 | 15.01 |
| 2013 | 43.69 | 29.17 | 14.53 |
| Person-Stays | Total | Leisure | Business |
| 2017 | 27.41 | 18.43 | 8.98 |
| 2016 | 25.61 | 16.88 | 8.73 |
| 2015 | 24.11 | 15.58 | 8.53 |
| 2014 | 22.62 | 14.70 | 7.92 |
| 2013 | 21.54 | 14.09 | 7.45 |

Austin-Round Rock, TX MSA Share of Texas Travel

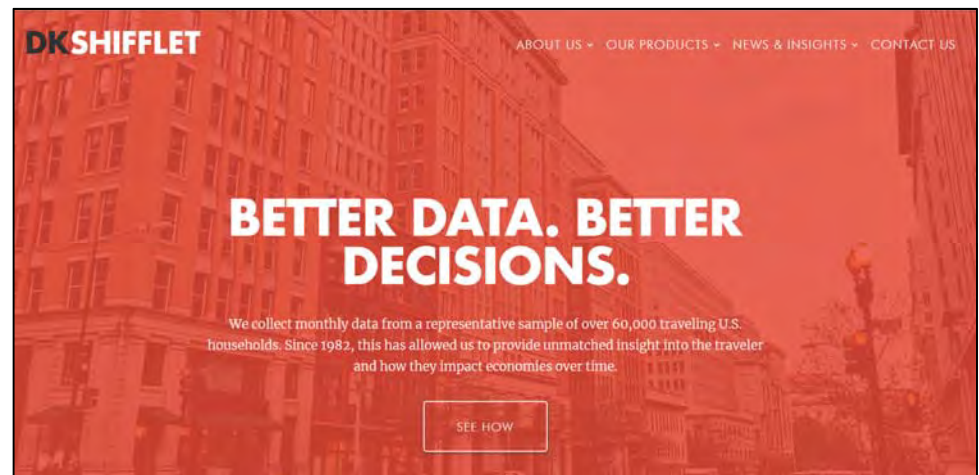
| Person-Days | Total | Leisure | Business |
|-------------|--------|---------|----------|
| 2017 | 10.33% | 9.6% | 13.15% |
| 2016 | 9.6% | 9.0% | 11.7% |
| 2015 | 9.3% | 8.7% | 11.3% |
| 2014 | 8.9% | 8.2% | 10.8% |
| 2013 | 8.7% | 8.0% | 10.5% |

Visitor Profile



Visitor Segmentation

- Trip characteristics: origin market, purpose, activities, overnight, day-trip, timing, paid or unpaid accommodations, etc.
- Demographic characteristics: Age, gender, income, life-stage, etc.

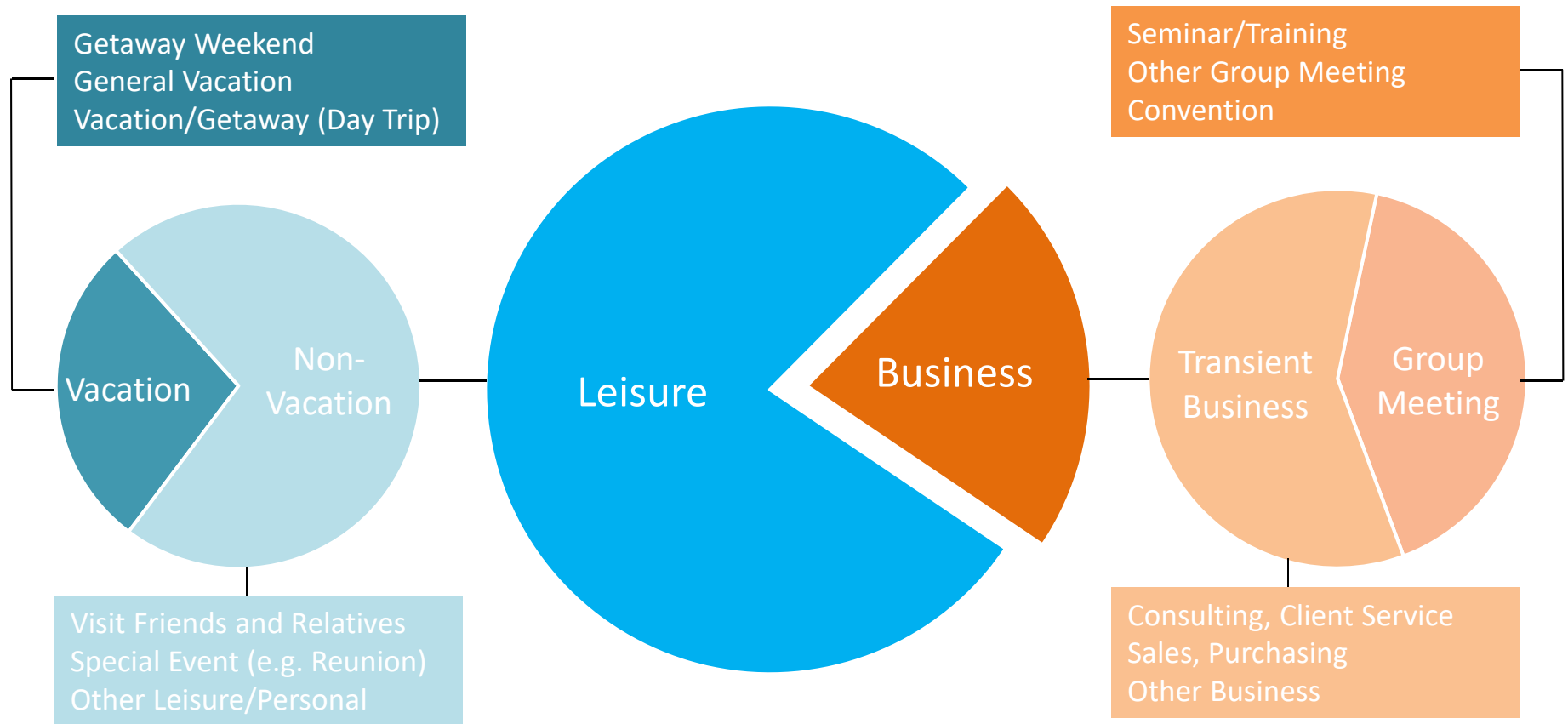


Austin-Round Rock MSA

| MSA | | MSA | |
|---------------------------------------|-------|------------------------------------|-------|
| Top Origin DMAs (Person-Stays) | | Top Origin DMAs (Person-Stays) | |
| In State DMAs | | Out-of-State DMAs | |
| Total Texans (Intrastate) | 80.8% | Total Non-Texans (Interstate) | 19.2% |
| Houston | 21.1% | San Francisco-Oakland-San Jose, CA | 1.7% |
| Austin | 16.0% | New York, NY | 1.3% |
| Dallas-Fort Worth | 14.1% | Los Angeles, CA | 0.9% |
| San Antonio | 13.9% | Boston, MA (Manchester, NH) | 0.8% |
| Waco-Temple-Bryan | 4.6% | Denver, CO | 0.7% |
| Harlingen-Weslaco-Brownsville-McAllen | 2.7% | Portland, OR | 0.7% |
| Corpus Christi | 2.5% | St. Louis, MO | 0.6% |
| Victoria | 1.8% | Chicago, IL | 0.6% |
| | | | |
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Texas Visitor Profile

| TEXAS | | TEXAS | |
|---------------------------------------|--------------|--------------------------------------|--------------|
| Top Origin DMAs (Person-Stays) | | Top Origin DMAs (Person-Stays) | |
| In State DMAs | | Out-of-State DMAs | |
| Total Texans (Intrastate) | 78.3% | Total Non-Texans (Interstate) | 21.7% |
| Dallas-Fort Worth | 18.7% | Oklahoma City, OK | 1.8% |
| Houston | 17.4% | New York, NY | 0.9% |
| San Antonio | 10.4% | Los Angeles, CA | 0.9% |
| Austin | 9.6% | Baton Rouge, LA | 0.7% |
| Harlingen-Weslaco-Brownsville-McAllen | 3.7% | Springfield, MO | 0.7% |
| Waco-Temple-Bryan | 3.3% | Tulsa, OK | 0.6% |
| Tyler-Longview (Lufkin, Nacogdoches) | 2.5% | Atlanta, GA | 0.5% |
| Corpus Christi | 2.3% | Minneapolis-St. Paul, MN | 0.5% |
| Odessa-Midland | 1.9% | Phoenix, AZ | 0.5% |
| Amarillo | 1.8% | Chicago, IL | 0.5% |
| | | | |
| | | | |
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| | | | |



Source: Travel Texas adapted from D.K. Shifflet & Associates

Austin-Round Rock MSA

| MSA | | MSA | |
|--------------------------------------|--------------|--------------------------------|--------------|
| Purpose of Stay (Person-Stays) | | Purpose of Stay (Person-Stays) | |
| Total Leisure | 74.1% | Total Business | 25.9% |
| Vacation | 19.6% | Meetings | 14.0% |
| Getaway Weekend-Overnight | 7.8% | Seminar/Training | 14.0% |
| General Vacation-Overnight | 5.9% | Convention | 6.7% |
| Day Trip Vacation/Getaway | 5.8% | Other Group Meeting | 2.9% |
| Non-Vacation | 54.4% | Transient | 12.0% |
| Visit Friend/Relative | 28.3% | Consulting/Client Service | 5.0% |
| Special Event (celebration, reunion) | 10.6% | Sales/Purchasing | 2.4% |
| Medical/Health Care | 2.6% | Construction/Repair | 1.1% |
| Convention/Show/Conference | 2.3% | Inspection/Audit | 0.5% |
| Seminar/Class/Training (personal) | 1.4% | Government/Military | 0.5% |
| Other Leisure/Personal | 9.1% | Other Business | 2.5% |

Texas Visitor Profile

| TEXAS | | TEXAS | |
|--------------------------------------|--------------|--------------------------------|--------------|
| Purpose of Stay (Person-Stays) | | Purpose of Stay (Person-Stays) | |
| Total Leisure | 79.9% | Total Business | 20.1% |
| Vacation | 21.3% | Meetings | 9.3% |
| Getaway Weekend-Overnight | 8.3% | Seminar/Training | 4.4% |
| Day Trip Vacation/Getaway | 7.8% | Convention | 1.9% |
| General Vacation-Overnight | 5.3% | Other Group Meeting | 3.1% |
| Non-Vacation | 58.6% | Transient | 10.8% |
| Visit Friend/Relative | 27.3% | Consulting/Client Service | 2.9% |
| Special Event (celebration, reunion) | 10.1% | Sales/Purchasing | 1.6% |
| Medical/Health Care | 4.4% | Construction/Repair | 1.2% |
| Convention/Show/Conference | 2.0% | Government/Military | 1.0% |
| Seminar/Class/Training (personal) | 0.7% | Inspection/Audit | 0.9% |
| Other Leisure/Personal | 13.9% | Other Business | 3.1% |

Austin-Round Rock MSA

| MSA | | MSA | |
|---|-------|---------------------------------------|--------------|
| Activities Summary (Stays) | | | |
| Attractions (Net) | 20.2% | Nature (Net) | 14.8% |
| Nightlife (bar, nightclub, etc.) | 15.3% | Parks (national/state, etc) | 9.6% |
| Amateur Sports (attend/participate) | 2.2% | Eco/Sustainable Travel | 2.9% |
| Show: Boat, Car, Home | 1.9% | Beach/Waterfront | 2.2% |
| Culture (Net) | 30.5% | Outdoor Sports (Net) | 8.5% |
| Live Music (festivals/concerts/clubs) | 11.7% | Hiking | 2.9% |
| Historic Sites | 9.8% | Boating/Sailing | 1.8% |
| Festival/Fairs (state, craft, etc.) | 7.8% | Biking | 1.8% |
| Family/Life Events (Net) | 39.1% | General (Net) | 34.4% |
| Visit Friends/Relatives (general visit) | 28.6% | Shopping | 19.3% |
| Personal Special Event (Anniversary, Birthday) | 5.9% | Business | 7.8% |
| Holiday Celebration (Thanksgiving, July 4th etc.) | 5.5% | Religious/Faith Based Conference | 2.4% |
| Libation and Culinary (Net) | 27.8% | Trip Party Composition (Trip-Days) | |
| Culinary/Dining Experience | 27.0% | Avg. Party Size (Adults and Children) | 1.64 persons |
| Winery/Distillery/Brewery Tours | 3.3% | One Male Only | 32.1% |
| | | One Female Only | 23.2% |
| | | One Male and One Female | 27.5% |
| | | Two Male or Two Females | 5.8% |
| | | Three or More Adults | 4.6% |
| | | Adults with Children | 6.8% |

Texas Visitor Profile

| TEXAS | | TEXAS | |
|---|-------|---------------------------------------|--------------|
| Activities Summary (Stays) | | | |
| Attractions (Net) | 18.0% | Nature (Net) | 14.1% |
| Nightlife (bar, nightclub, etc.) | 8.3% | Parks (national/state, etc) | 7.3% |
| Amateur Sports (attend/participate) | 3.5% | Beach/Waterfront | 6.2% |
| Zoo/Aquarium | 3.2% | Wildlife Viewing (birds, whales etc.) | 2.1% |
| Culture (Net) | 24.5% | Outdoor Sports (Net) | 8.4% |
| Historic Sites | 6.8% | Hiking | 2.6% |
| Touring/Sightseeing | 6.3% | Fishing | 2.6% |
| Movies | 5.3% | Golfing | 1.5% |
| Family/Life Events (Net) | 39.1% | General (Net) | 35.9% |
| Visit Friends/Relatives (general visit) | 27.4% | Shopping | 19.7% |
| Personal Special Event (Anniversary, Birthday) | 7.1% | Business | 6.4% |
| Holiday Celebration (Thanksgiving, July 4th etc.) | 4.8% | Medical/Health/Doctor Visit | 5.8% |
| Libation and Culinary (Net) | 22.1% | Trip Party Composition (Trip-Days) | |
| Culinary/Dining Experience | 21.3% | Avg. Party Size (Adults and Children) | 1.79 persons |
| Winery/Distillery/Brewery Tours | 1.5% | One Male Only | 27.7% |
| | | One Female Only | 21.3% |
| | | One Male and One Female | 27.2% |
| | | Two Males or Two Females | 7.4% |
| | | Three or More Adults | 4.5% |
| | | Children Present | 11.9% |

Austin-Round Rock MSA

| MSA | | | MSA | | |
|--|----------------------------|-------------|-----------------------------------|-----------|-------|
| Length of Stay (Stays) | | | Accommodation Type (Person-Stays) | | |
| Average Length (Incl. Days) | | 1.94 days | Paid Accommodations | | 62.6% |
| Average Length (Overnight Only) | | 2.47 nights | Hotel/Motel | | 50.9% |
| | Day –Trips | 52.0% | | High-End | 16.4% |
| | 1-3 Nights | 38.5% | | Mid-Level | 24.9% |
| | 4-7 Nights | 8.2% | | Economy | 8.1% |
| | 8+ Nights | 1.3% | Other Hotel/Motel | | 1.5% |
| Primary Mode of Transportation (Person-Stays) | | | Non-Hotel/Motel | | 11.7% |
| | Air | 9.3% | Non-Paid Accommodations | | 36.6% |
| | Auto Travel (Net) | 88.2% | Other Overnight | | 0.7% |
| | Other Transportation (Net) | 2.5% | | | |
| | Bus | 2.2% | | | |
| | Train | 0.2% | | | |
| | Other | 0.2% | | | |
| Distance Traveled One-Way from Home (Person-Stays) | | | | | |
| Average Distance Traveled | | 305 miles | | | |
| | 250 Miles or Less | 76.3% | | | |
| | 251-500 Miles | 5.4% | | | |
| | 500-1000 Miles | 7.7% | | | |
| | 1001 Miles or More | 10.6% | | | |

Texas Visitor Profile

| TEXAS | | | TEXAS | | |
|---|----------------------------|--------|----------------------------------|-------------------|-------|
| Length of Stay (Stays) | | | Accommodation Type (Person-Days) | | |
| Average Length (Incl. Days) | 2.06 | days | Paid Accommodations | | 65.5% |
| Average Length (Overnight Only) | 2.52 | nights | Hotel/Motel | | 53.9% |
| | Day –Trips | 48.1% | | High-End | 11.4% |
| | 1-3 Nights | 42.0% | | Mid-Level | 27.7% |
| | 4-7 Nights | 8.3% | | Economy | 12.6% |
| | 8+ Nights | 1.6% | | Other Hotel/Motel | 2.2% |
| Primary Mode of Transportation (Person-Days) | | | Non-Hotel/Motel | | 11.6% |
| | Air | 7.6% | Non-Paid Accommodations | | 33.9% |
| | Auto Travel (Net) | 89.8% | Other Overnight | | 0.6% |
| | Other Transportation (Net) | 2.6% | | | |
| | Bus | 1.2% | | | |
| | Train | 0.6% | | | |
| | Other | 0.8% | | | |
| Distance Traveled One-Way from Home (Person-Days) | | | | | |
| Average Distance Traveled | 275 | miles | | | |
| | 250 Miles or Less | 72.8% | | | |
| | 251-500 Miles | 12.3% | | | |
| | 500-1000 Miles | 7.5% | | | |
| | 1001 Miles or More | 7.4% | | | |

Austin-Round Rock MSA

| MSA | | MSA | |
|------------------------------------|--------------|---|-----------------|
| Expenditure Summary (Person-Stays) | | Expenditure Summary (Person-Stays) | |
| Transportation - Total | 31.7% | Avg. Per Person Per Day Spending | \$136.40 |
| Transportation - Excluding Airfare | 19.4% | Transportation - Total | \$43.30 |
| Transportation - Airfare | 12.3% | Transportation - Excluding Airfare | \$26.50 |
| Transportation - Rental Car | 5.0% | Transportation - Airfare | \$87.40 |
| Transportation - Other | 14.4% | Transportation - Rental Car | \$43.50 |
| Food | 26.2% | Transportation - Other | \$19.60 |
| Lodging - Total | 19.3% | Food | \$35.80 |
| Lodging - Room | 17.9% | Lodging - Total | \$62.80 |
| Lodging - Services | 1.4% | Lodging - Room | \$67.90 |
| Shopping | 12.6% | Lodging - Services | \$5.70 |
| Entertainment | 7.6% | Shopping | \$17.20 |
| Miscellaneous | 2.5% | Entertainment | \$10.30 |
| | | Miscellaneous | \$3.40 |

Data on expenditures represent direct spending per person per day for six expenditure categories (transportation, food/drink, entertainment, shopping, accommodations, and other miscellaneous expenditures) separately and in total. Individual category spending is based on reported spending at least \$1. Total spending is based on reported spending of at least \$1 in any given category, but not necessarily all categories. For this reason the individual categories can not simply be summed to arrive at the total spending figure. Expenditure information is critical in assessing the direct economic impact of visitors and this method of calculating spending averages by eliminating "\$0" spending for a category provides a more accurate estimate of category spend as well as total spending.

Texas Visitor Profile

| TEXAS | | TEXAS | |
|------------------------------------|--------------|---|-----------------|
| Expenditure Summary (Person-Days) | | Expenditure Summary (Person-Days) | |
| Transportation - Total | 31.6% | Avg. Per Person Per Day Spending | \$122.40 |
| Transportation - Excluding Airfare | 20.9% | Transportation - Total | \$38.60 |
| Transportation - Airfare | 10.7% | Transportation - Excluding Airfare | \$25.50 |
| Transportation - Rental Car | 4.4% | Transportation - Airfare | \$88.30 |
| Transportation - Other | 16.5% | Transportation - Rental Car | \$44.20 |
| Food | 25.5% | Transportation - Other | \$20.20 |
| Lodging - Total | 17.9% | Food | \$31.20 |
| Lodging - Room | 16.4% | Lodging - Total | \$48.20 |
| Lodging - Services | 1.5% | Lodging - Room | \$53.60 |
| Shopping | 13.3% | Lodging - Services | \$5.30 |
| Entertainment | 9.1% | Shopping | \$16.20 |
| Miscellaneous | 2.7% | Entertainment | \$11.20 |
| | | Miscellaneous | \$3.30 |

Data on expenditures represent direct spending per person per day for six expenditure categories (transportation, food/drink, entertainment, shopping, accommodations, and other miscellaneous expenditures) separately and in total. Individual category spending is based on reported spending at least \$1. Total spending is based on reported spending of at least \$1 in any given category, but not necessarily all categories. For this reason the individual categories can not simply be summed to arrive at the total spending figure. Expenditure information is critical in assessing the direct economic impact of visitors and this method of calculating spending averages by eliminating "\$0" spending for a category provides a more accurate estimate of category spend as well as total spending.

Austin-Round Rock MSA

| MSA | | | | MSA | |
|------------------------------------|---------------------|-----------|-----------------------|------------------|-------|
| Demographic Profile (Person-Stays) | | | | | |
| Average Age | | 45.1 | Employment | | |
| | 18-34 Years | 30.3% | | Employed | 74.6% |
| | 35-49 Years | 32.5% | | Retired | 12.2% |
| | 50-64 Years | 24.2% | | Not Employed | 13.2% |
| | 65+ Years | 12.9% | | | |
| | | | Marital Status | | |
| Average HH Income | | \$105,779 | | Married | 63.1% |
| | Under \$25,000 | 9.6% | | Never Married | 28.8% |
| | \$25,000-\$49,999 | 17.5% | | Divorced/Widowed | 8.1% |
| | \$50,000-\$74,999 | 15.2% | | | |
| | \$75,000-\$99,999 | 15.2% | Children in Household | | |
| | \$100,000-\$149,999 | 18.4% | | Yes | 34.3% |
| | \$150,000+ | 24.1% | | No | 65.7% |

Texas Visitor Profile

| TEXAS | | | TEXAS | | |
|-----------------------------------|---------------------|----------|-----------------------|------------------|-------|
| Demographic Profile (Person-Days) | | | | | |
| Average Age | | 48.2 | Employment | | |
| | 18-34 years | 24.5% | | Employed | 66.3% |
| | 35-49 years | 29.3% | | Retired | 21.3% |
| | 50-64 years | 27.5% | | Not Employed | 12.3% |
| | 65+ years | 18.7% | | | |
| | | | Marital Status | | |
| Average HH Income | | \$95,537 | | Married | 66.8% |
| | Under \$25,000 | 10.1% | | Never Married | 21.9% |
| | \$25,000-\$49,999 | 21.6% | | Divorced/Widowed | 11.4% |
| | \$50,000-\$74,999 | 15.5% | | | |
| | \$75,000-\$99,999 | 16.4% | Children in Household | | |
| | \$100,000-\$149,999 | 19.6% | | Yes | 35.2% |
| | \$150,000+ | 16.7% | | No | 64.8% |

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 2017 | 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 | 5,653 | 0.2% | 0.4% | 0.6% | 0.8% | 1.1% |
| Hill Country Region | 2,327 | 0.3% | 0.6% | 0.9% | 1.3% | 1.7% |
| Austin-Round Rock, TX MSA | 2,068 | 0.4% | 0.7% | 0.9% | 1.4% | 1.8% |

More information,

For travel industry information including the Travel Texas marketing plan, co-op opportunities and travel research: www.travel.texas.gov

For consumer travel information:
www.traveltexas.com



TRAVEL  TEXAS

Thank you,

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TRAVEL  TEXAS