



Longwoods
Travel USA®

Arkansas
2015 Visitor Report
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Table of Contents



	<u>Page</u>
Introduction	3
Methodology	4
Summary of Findings	5
Conclusions and Implications	47
Main Findings	53
U.S. Travel Market — Structure & Trends	54
Overnight Trips to Arkansas	64
Overnight Trip Volume & Expenditure Estimates	65
Overnight Leisure Trip Sources of Business	79
Overnight Leisure Trip Demographics	84
Overnight Leisure Trip Planning & Booking	105
Overnight Leisure Trip Characteristics	117
Overnight Segment Profiles — Touring, Outdoors, & Special Event Trips	138
Day Trips to Arkansas	176
Day Trip Volume & Expenditure Estimates	177
Day Trip Sources of Business	186
Day Trip Demographics	189
Day Trip Characteristics	210
Demographic Profile of Overnight Intenders	220
Appendix: Key Terms Defined	233

Introduction



- Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- This report provides an overview of Arkansas's domestic travel and tourism business in 2015.

Methodology



- Longwoods Travel USA® is a proprietary syndicated survey conducted via a nationally representative online panel.
- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.
- For the 2015 travel year, this yielded :
 - *326,782 trips for analysis nationally:*
 - *227,218 overnight trips*
 - *99,564 day trips*
- For Arkansas, the following sample was achieved in 2015:
 - *2,951 trips:*
 - *1,928 overnight trips*
 - *1,023 day trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Summary of Findings

Highlights



- On a national basis, travel and tourism in 2015 posted gains in the two major leisure trip segments, however, business travel stalled:
 - *Overall, domestic travel volume rose 2%, continuing the upward momentum and recovery that began in 2009*
 - *Marketable leisure trips rose 1% year over year*
 - *Visits to friends and relatives increased by 3% versus 2014*
 - *Business trip volume remained unchanged*
- The growth of marketable leisure travel was reflected in strong gains for individual trip segments that generally have higher expenditures per person, including touring trips, resort trips, cruises and combined business-leisure trips.
- At the same time there were also moderate increases in special event and ski trips.
- Theme park trips stayed at the same level as in 2014, while city, outdoor and casino trips dropped significantly in number.

National Travel Trends



- Over the longer term, i.e., looking at trends since the start of tracking in 1994, the marketable leisure segments with the highest rate of nationwide growth have been city trips and casino trips, followed by special event and touring trips, while the lowest growth was evident for ski, business-leisure and outdoor trips.
- The growth pattern over the past few years extended beyond just trip-taking in 2015, with travelers' spending rising strongly among both vacationers and business travelers :
 - *The average overnight leisure traveler's spending per trip grew by 8% from \$220 in 2014 to \$237 in 2015*
 - *And business travelers' per capita spending increased 3% from \$349 to \$360 per person on a year over year basis*

National Travel Trends



- The number of overnight trips taken by the average American traveler per quarter continues to rebound, now at 3.0 and continuing to rise from a low of 2.5 trips during 2010:
 - *The 2015 level slightly exceeds the pre-recession peak of 2.9 trips in 2007*
- The average length of an overnight trip nationally grew sharply to 4.0 nights in 2015 from 3.7 nights the previous year – a new high for the past decade.
- Day travel nationwide continued to improve in 2015, rising by 2% in overall trips taken.
- Per capita spending on day trips remained stable at \$68 in 2015, the same as it was in 2014.

Arkansas Visitor Volumes



- Overnight travel volume for Arkansas reached a new high in 2015:
 - *In 2015 Arkansas welcomed 19.6 million visitors on overnight trips, up from 19.2 million a year earlier*
 - *This increase was largely due to a rise in leisure travel which grew 3% to 16.7 million overnight trips from 16.3 million the year before*
 - *In comparison, business-oriented travel showed mixed results:*
 - *Overnight business travel to the state was essentially flat, staying at 2.0 million trips on a year-to-year basis*
 - *Combined business-leisure travel, however, posted a sharp increase, rising to 950,000 trips from 890,000 the year before*
- The basic ratio of adults to kids in Arkansas overnight travel parties remained similar from year to year at approximately 3 to 1.

Arkansas Visitor Volumes



- ◉ When we look in more detail at Arkansas visitor trends by main purpose of overnight trips, we find that:
 - ◉ *There were about the same number of “marketable” leisure trips to Arkansas in 2015 as the year before:*
 - ◉ *Marketable leisure trips are those discretionary trips where consumers have a choice of which destinations they will visit and which therefore can be influenced by marketing*
 - ◉ *The volume of touring, outdoors, and special event trips to Arkansas grew in 2015; however there were corresponding declines in the number of city, resort, and theme park vacations*
 - ◉ *The national growth rate for marketable travel was only 1%*
 - ◉ *Trips to visit friends and relatives in Arkansas exceeded the national growth rate, rising by 6% to 8.7 million trips:*
 - ◉ *Nationwide, VFR travel rose by 3%*

Arkansas Visitor Volumes



- ◉ Because Arkansas travel rose at a slightly greater rate than the nation as a whole, the state's overall market share in 2015 improved to 1.16% from 1.14% in 2014, which ranks it 33rd among the 50 states for domestic overnight trips – about the same ranking as last year.
- ◉ In 2015, the number of day trips taken to or within Arkansas declined by 3% compared to the year earlier, to 27.8 million trips:
 - ◉ *Interrupting the upward swing that began in 2012 after several years of decline or no growth*
- ◉ The decrease in day trips was spread across both leisure and business travel, and the numbers of adults and children traveling.
- ◉ With day travel declining for Arkansas versus national growth, Arkansas's share of the day trip market dropped to 1.2%, slightly less than a year earlier (1.3%).

Arkansas Travel Expenditures



- ◉ Visitor expenditures on overnight trips to Arkansas were virtually flat from year to year, reaching \$3.52 billion in 2015, about the same as in 2014 (\$3.55 billion).
- ◉ Leisure visitors accounted for 85% of all travel-related expenditures in 2015 or \$3.0 billion, while business travelers' spending contributed 11% or \$0.37 billion, and expenditures by combined business-leisure visitors amounted to \$0.14 billion or the remaining 4% of spending.

Arkansas Travel Expenditures



- ◉ Looking at the five main business sectors that are traditionally linked with travel and tourism, we find that one sector experienced growth in visitor spending:
 - ◉ *Expenditures on hotels and other lodging in Arkansas rose 5% from \$1.35 billion to \$1.42 billion*
- ◉ Three sectors remained stable on a year-to-year basis
 - ◉ *Restaurant food and beverage in 2015 accounted for \$716 million in visitor spending, similar to 2014 (\$722 million)*
 - ◉ *Retail sales to visitors amounted to \$579 million, about the same as the year before at \$589 million*
 - ◉ *Visitors' expenditures on admissions/fees for sightseeing attractions, entertainment venues, and recreation stayed flat at \$334 million versus \$335 million in 2014*
- ◉ Only one sector experienced a major decrease in visitor spending:
 - ◉ *The amount people spent on transportation, including car rentals and gasoline decreased from \$551 million to \$465 million over the year, likely reflecting the continuing decline in gasoline prices*

Arkansas Travel Expenditures



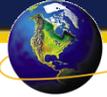
- In 2015, Arkansas overnight vacationers' average spending declined 3% to \$178 per trip in the state, down from \$184 in 2014.
- And the expenditures of business travelers fell 8% to \$204 from \$223 in 2014.
- Part of this per capita decline is a reflection of a slightly rising number of children in Arkansas visitors' travel party.
- As we have seen in previous studies, Arkansas tourists tended to spend less than the norm for vacationers across the country (\$178 per capita vs. \$237 nationally in 2015).
- However, there continues to be a more substantial gap among business visitors, with a much lower average expenditure per person in Arkansas (\$204 in 2015) than nationwide (\$360):
 - *Which is reflective of the substantially lower cost of typical travel expenses in Arkansas, especially accommodations and food.*

Arkansas Travel Expenditures



- ◉ Spending by people visiting Arkansas on day trips in 2015 plateaued in 2015, remaining at \$1.8 billion, virtually the same as in 2014
 - ◉ *The year over year decline in trip volume was offset by gains in per capita spending which rose from \$64 in 2014 to \$65 in 2015*
 - ◉ *Somewhat higher spending on retail was balanced by lower expenditures on transportation and recreation, while the restaurant food/beverage sector experienced relatively little change in visitor spending*
- ◉ For the average Arkansas daytripper, retail purchases (33%) and food/beverage (31%) accounted for most of that spending in 2015 with the remainder going towards local transportation expenses (20%) and spending on recreation/sightseeing/attractions (16%):
 - ◉ *About the same distribution as in 2014*

Sources of Business



- In 2015, Arkansas residents accounted for 25% of overnight leisure trips to Arkansas, somewhat fewer than in 2014 (32%).
- Neighboring states remained the primary out-of-state markets for visitors, including:
 - *Texas (13%)*
 - *Missouri (9%)*
 - *Oklahoma (5%)*
 - *Tennessee (4%)*
 - *Louisiana (4%)*
- In addition, Arkansas welcomed sizeable numbers of tourists coming from more distant markets such as California, Illinois, Florida, and New York.
- The top out-of-state urban markets for overnight trips in 2015 were:
 - *Dallas – Ft. Worth*
 - *Springfield MO*
 - *Los Angeles*
 - *Memphis*
 - *Houston*
 - *New York City*
 - *Shreveport*
 - *Chicago*
 - *Kansas City*

Sources of Business



- ◉ Arkansas itself remained the primary source of daytrippers within the state in 2015, accounting for about half (50%) of these visitors
 - ◉ *Slightly fewer than in 2014 (55%)*
- ◉ A high proportion of out-of-state day travelers came from:
 - ◉ *Missouri*
 - ◉ *Oklahoma*
 - ◉ *Texas*
 - ◉ *Tennessee*
- ◉ The list of states providing day visitors also includes more distant places such as California, Florida and New York, whose residents included Arkansas on a day trip from a neighboring state or while passing through the region on a longer trip.

Profile of Arkansas Overnight Visitors



- The demographics of Arkansas's overnight leisure visitors in 2015 were very similar to those of vacationers nationwide in a number of respects:
 - *An even gender split*
 - *About 6 in 10 are married*
 - *Employment status*
 - *Race/ethnicity*
- There were just a few skews – Arkansas overnight vacationers in 2015 were:
 - *Somewhat younger – average age of 43 vs. a national norm of 45*
 - *Living in larger households with more kids/teens living at home*
 - *Less upscale in terms of income and education*
- These demographics have not changed markedly over the year between surveys.

Overnight Leisure Trip Characteristics



- In the 2015 Travel USA™ survey, we added questions about the trip planning cycle and sources used to plan and book the trips respondents were asked to describe.
- Arkansas vacationers in 2015 were quite similar to American travelers in general in terms of how far in advance they plan their travel:
 - *One half started planning their trip at least 2 months ahead of time*
- The sources of information people used most often to plan their Arkansas trip included accommodations (16%), online travel agencies (Expedia, Orbitz, Hotels.com, etc.) (13%), social media (11%), AAA/an auto club (10%), destination websites (10%) and airlines/other commercial carriers (9%).
- Slightly fewer indicated they consulted travel guides/other books (9%) or a visitor bureau/government tourism office (8%) for trip planning purposes.

Overnight Leisure Trip Characteristics



- The sources that vacationers most often used to book their trip to Arkansas were hotels/resorts, online travel agencies, and airlines/other commercial carriers, each mentioned by between 1 in 10 and 1 in 6 travelers.
- Arkansas vacationers were more likely than the norm to use many of these sources of information for planning and booking their travel, including AAA/an auto club, travel guide books and other traditional media, and less likely to use airlines/commercial carriers for these purposes.

Overnight Leisure Trip Characteristics



- About 4 in 10 Arkansas vacationers indicated they used a laptop or desktop computer to help them plan their trip, followed by a smartphone at 3 in 10 and a tablet at 2 in 10. The most portable of these devices move to the fore when people are asked about the devices they brought with them/used during their trip – two-thirds said they used a smartphone, and a third mentioned a tablet and/or laptop.
 - *Arkansas visitors were slightly above average in their use of a laptop while on their trip*
- Usage of “social media” to converse about travel in general remained very high in 2015, with the largest change being continued growth in usage of smartphones.
- In 2015, 8 in 10 Arkansas leisure visitors and American vacationers in general indicated that they recently engaged in some travel-related activity via social media (a list of 14 common activities was provided), about the same as the previous year.

Overnight Leisure Trip Characteristics



- The most common uses for social media “in the past 3 months” in this general context in 2015 for both Arkansas vacationers and those visiting the average destination were:
 - *Using a smartphone/tablet while traveling (no specific purpose was specified) – this continued to rise slightly to over one half of vacationers in 2015*
 - *Posting travel photos and videos on social media websites*
 - *Reading travel reviews*
 - *Looking at other people’s travel photos*
 - *Learning about travel deals/promotions*

Overnight Leisure Trip Characteristics



- As was the case in 2014, fewer people got more involved or sought specific information in activities such as:
 - *Connecting with others interested in travel*
 - *Reading/writing a travel blog or contributing travel reviews*
 - *Seeking out or giving travel advice via social networking*
 - *Following a destination/attraction on Facebook/Twitter*
 - *Tweeting about a trip*
 - *Subscribing to a travel newsletter*
- Compared to 2014, slightly more Arkansas visitors used a smartphone or learned about deals/events via social networking.
- Our on-going research for Arkansas and other destinations continues to show that use of social media for planning of specific trips still typically remains at or below 10%.

Profile of Arkansas Overnight Visitors



- Leisure trips to Arkansas in 2015 were slightly higher in the last three quarters than in the first quarter:
 - *There was a slightly greater peak in spring/summer in 2014*
 - *Despite these marginal skews, Arkansas is basically a four season destination*
- In 2015, the average length of the overall trip and the time spent in Arkansas by overnight leisure visitors remained the same as in the prior year:
 - *Overall trip length in 2015 continued at 4.1 nights and the portion of that trip spent in Arkansas stayed at 3.0 nights*
- The typical leisure travel party to Arkansas in 2015 averaged 3.2 individuals – 2.3 adults and one child:
 - *About the same as in 2014*
 - *Compared to the national norm, Arkansas trips were more likely to include children in the travel party*

Profile of Arkansas Overnight Visitors



- In 2015, a very high proportion of Arkansas vacationers (81%) drove to the state in their own car or truck, about the same number as in 2014 (79%).
 - *An additional 1 in 7 (15%) rented a vehicle at their destination*
 - *And the same proportion (14%) of vacationers arrived by air*
- Compared to the average U.S. destination, Arkansas vacations in 2015 were:
 - *more likely to involve the family car/truck, a camper or a motorcycle*
 - *less likely to include air transportation*

Profile of Arkansas Overnight Visitors



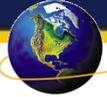
- About two-thirds (65%) of Arkansas vacationers in 2015 stayed at some form of commercial accommodation (hotel, motel, inn, B&B) on their trip, while about one third (34%) stayed with friends/relatives
- Approximately 1 in 4 used second homes or rentals of homes, condos or cottages/cabins while on their trip, and 1 in 10 stayed in a campground,
- Over the year between surveys, there were increases in the numbers of people saying they used commercial accommodations and/or stayed with friends/relatives:
 - *Note that these numbers add to more than 100%, as people can stay in multiple types of lodging on a single trip*
- Relative to the national norm, Arkansas visitors were more likely to stay in smaller properties like inns and B&B's, as well as campgrounds and rental accommodations.

Profile of Arkansas Overnight Visitors



- The most popular activities for vacationers visiting Arkansas in 2015 included:
 - *shopping*
 - *visiting a national or state park*
 - *visiting sightseeing venues such as landmarks, historic sites, museums and art galleries*
 - *fine dining*
 - *outdoor recreation – swimming, hiking, fishing, camping, and boating*
 - *entertainment venues such as gaming; theater; bars/nightclubs; fairs/festivals; theme parks; zoos; dance and musical performances*
- Compared to the norm, Arkansas leisure trips are more apt to include visits to parks, historic places, museums and galleries; fishing and other outdoor pursuits like camping, hiking, hunting, etc.; and less likely to include beach activities or fine dining.
- Compared with 2014 visitors, people visiting Arkansas on leisure trips in 2015 were slightly less likely to have gone hunting. Otherwise, the roster of activities and experiences that each year's visitors engaged in was comparable.

Profile of Arkansas Overnight Visitors



- In addition to enumerating the activities they engaged in, leisure travelers were asked to identify which of several specific interests they had on their trip.
- Interest in historic places was at the top of the list of specific draws for Arkansas vacationers in 2015, followed by an interest in cultural activities and attractions.
- Visitors expressed a lower level of interest in culinary experiences, eco-tourism or traveling with grand-children.
- Only between 5% and 7% of vacationers indicated their trips specifically revolved around a wedding, beer or wine tourism, medical tourism or religious travel.
- Versus the national norm, Arkansas vacationers in 2015 seemed more interested in historic, eco, religious and medical-related tourism, as well as travel with grandchildren.

Overnight Leisure Trip Characteristics



- ◉ In 2015, we added trip satisfaction ratings to the Travel USA™ survey.
- ◉ About 3 in 4 Arkansas visitors indicated they were “very satisfied” with the overall trip experience they had and the friendliness of local people they encountered.
- ◉ And approximately two-thirds felt the same way about the quality of accommodations and quality of food.
- ◉ People were somewhat less enthusiastic about the sightseeing/attractions they experienced, the value for money they felt they received and, especially, the nightlife, music and entertainment available.
- ◉ Arkansas visitors were more positive than the national norm on the friendliness of locals and value for money.

Overnight Leisure Trip Characteristics



- The 2015 survey also included new questions about prior travel to destinations.
- For both Arkansas and destinations across America, the vast majority of vacationers have visited at some point in the past:
 - *85% of Arkansas visitors claim to have visited previously, including 77% who indicated they did so in the previous year.*
 - *These proportions are similar to the national norm*

Profile of Arkansas Day Visitors



- ◉ Demographically, people taking day trips to or within Arkansas during 2015 were quite similar to the typical U.S. daytripper in many respects:
 - ◉ *Gender is skewed slightly female*
 - ◉ *Same age, averaging 44 years old*
 - ◉ *Most are married*
 - ◉ *Similar race/ethnicity*
- ◉ Versus the norm, however, they tended to be:
 - ◉ *Less upscale in terms of education and income*
 - ◉ *More often have kids in household*
 - ◉ *More often retired*
- ◉ The Arkansas daytripper's demographic profile changed slightly between 2014 and 2015, in just one area:
 - ◉ *Higher level of education*

Profile of Arkansas Day Visitors



- The Arkansas day trip party in 2015 averaged 2.8 people, including 2.1 adults and 0.7 children:
 - *Comparable to the national norm and the same as in 2014*
- The seasonal distribution of day trips was similar to 2014, with fairly equal proportions across the four quarters.
- The top activities for those visiting Arkansas on daytrips in 2015 included:
 - *Shopping*
 - *Sightseeing activities such as visiting a landmark/historic site, a major park, or museum*
 - *Fine dining*
 - *Outdoor recreational pursuits like hiking, going to a beach/swimming, fishing, etc.*
 - *Visiting a gaming venue*
 - *Attending a fair/festival/exhibition*
- Daytrippers to/within Arkansas in 2015 generally participated in similar activities relative to their counterparts in 2014 with just a few shifts:
 - *More daytrippers went shopping*
 - *Fewer visited a beach or national/state park*

Profile of Arkansas Overnight “Intenders”



- The following analysis profiles those people in the Travel USA study who indicated they intend to visit Arkansas on an overnight trip “in the next 12 months”.
- Consistent with results of the past several years, the primary out-of-state markets for “intenders” are Texas, Missouri, Oklahoma, California, Louisiana, Florida, Illinois, and Kansas.
- The top out-of-state urban markets for intenders in 2015 were:
 - *Dallas – Ft. Worth*
 - *Springfield MO*
 - *Kansas City*
 - *Houston*
 - *Los Angeles*
 - *Joplin-Pittsburg*
 - *Tulsa*
 - *Chicago*
 - *Memphis*
 - *Shreveport*
 - *Oklahoma City*

Profile of Arkansas Overnight “Intenders”



- Travelers who intend to visit Arkansas are skewed:
 - *Female*
 - *Older – the average age of 47 years is higher than the Arkansas overnight leisure traveler norm of 43*
 - *Consequently fewer kids living at home*
 - *Less often employed than the norm/more often retired*
 - *Consistent with 2014*
 - *Slightly less likely to be of Hispanic background than U.S. and Arkansas vacationers*
 - *Slightly less upscale in terms of household income*
- They resemble the typical Arkansas leisure overnight visitor in terms of marital status, race, and education.

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ In this section, we profile Arkansas's three largest trip purpose segments in 2015 – touring, special event and outdoor trips.
- ◉ Looking first at the touring trip segment, we find that this type of travel was up 4% from year to year, generating approximately 2.2 million trips, which is the equivalent to a 1.4% market share for this type of travel:
- ◉ With this share, Arkansas occupies 33rd place among the states for touring trips, about the same level as states such as Wyoming, Kentucky, Maryland and Indiana.
- ◉ People on touring trips spent an average of 2.6 nights in the state, down very slightly from 2.7 nights in 2014.

Profiles of Arkansas's Key Overnight Leisure Segments



- In 2015, the Arkansas touring travel party numbered 2.9 people:
 - *Comprising 2.2 adults and 0.7 children*
 - *Down from 2014 (3.2 people), but the same as the Arkansas average for leisure travel*
- Arkansas touring vacationers generally traveled using the family car:
 - *Although they had the highest fly-in component among the key segments, still only 16% arrived by air*
- And they made substantial use of commercial accommodations, including the smaller properties such as inns and B&B's.
- In terms of experiences and activities in Arkansas, this is one of the segments with the highest levels of participation in:
 - *Shopping*
 - *Sightseeing – i.e., visiting local landmarks, historic sites, national and state parks, wineries*
 - *Cultural and heritage activities such as museums, art galleries*
 - *Fine dining*

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ The average expenditures of touring vacationers while in Arkansas in 2015 totaled \$176 per person, about the same as the leisure travel norm for the state (\$178)
- ◉ Touring vacationers comprised the segment most likely to visit from out-of-state (88%), with significant volume coming from Texas (14%), followed by Missouri, California, Mississippi, Louisiana, Oklahoma, and Illinois.
- ◉ And among the three main leisure segments, they were least likely to have visited the state previously.
- ◉ Given their greater distance to market, it is not surprising that these travelers booked their travel further in advance than other segments:
 - ◉ *Two-thirds (67%) indicated they started planning their trip at least two months ahead of departure*

Profiles of Arkansas's Key Overnight Leisure Segments



- They were particularly likely to plan and book their travel using online travel agencies. And they are among the groups most likely to use mobile devices for trip planning and while traveling.
- Touring vacationers were similar to the other groups in terms of overall trip satisfaction.
- With respect to demographics, Arkansas touring vacationers in 2015 had the following characteristics:
 - *An even split of men and women*
 - *Slightly older than the typical Arkansas vacationer (46 vs. 43 years old), smaller households, more often married but fewer children still in the home*
 - *Better educated and higher income than the other key segments*

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ In 2015, Arkansas welcomed 1.42 million special event vacationers, up 20% from 1.19 million in 2014.
- ◉ Arkansas's share of this segment's travel remained constant over the year at 0.9%
 - ◉ *Arkansas was in 37th spot among the states for this trip purpose, comparable to Oklahoma, Utah, Nebraska, Iowa, New Mexico and Kansas*
- ◉ Special event trips are typically shorter than others, and this is reflected in the trip length numbers for Arkansas in 2015:
 - ◉ *The average length of a special event trip to Arkansas was 3.1 nights, of which 1.9 nights were spent in Arkansas itself, slightly shorter than in 2014*
- ◉ Per capita spending dropped slightly for this type of travel to Arkansas,
 - ◉ *averaging \$123 in 2015 versus \$135 in 2014, which is substantially below the leisure norm for the state.*
 - ◉ *consistent with a briefer stay in the state*

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ In 2015, the Arkansas special event travel party averaged 3.7 people, including 2.8 adults and 0.9 children.
- ◉ As in prior years, the events that drew visitors in this segment to Arkansas in 2015 included a mix of sports (as participants and/or spectators), festivals/fairs, religious events, and cultural/live performances (theater, dance, music concerts, rodeos, etc.)
- ◉ Special event travelers in 2015 mainly arrived by car/truck (83%):
 - ◉ *With the rest split mainly between plane and bus*
- ◉ Most special event travelers stayed in hotels or motels on their trip.

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ With the event being attended as the focus of their trip, the other activities and attractions on this segment's itinerary came in at relatively low levels in 2015. The most common were:
 - ◉ *Shopping*
 - ◉ *Recreational activities like swimming and going to a spa*
 - ◉ *Sightseeing, including landmarks/historic sites, museums, and art galleries*
 - ◉ *Fine dining*
 - ◉ *Bars/nightclubs*
- ◉ Other outdoor activities were not often on this group's agenda while visiting Arkansas.
- ◉ About two-thirds of special event visits in 2015 originated out-of-state, with many people coming from Missouri, Louisiana, Texas, and other neighboring states, but also many being drawn from much further afield, including California, New Jersey, Illinois, etc.:
 - ◉ *Consistent with the nature of events having broader than local audiences*

Profiles of Arkansas's Key Overnight Leisure Segments



- In 2015, special event vacationers had the shortest trip planning cycle among the top segments – just over half (56%) started planning their travel more than two months ahead of time.
- They continued to be similar to touring vacationers in their high levels of use of mobile devices for trip planning/booking, and for recent use of social media for travel-related purposes in general.
- Special event visitors were similar to Arkansas vacationers generally in terms of demographics such as age, marital status, presence of children in the household, and employment status.
- There were some differences in their profile – Arkansas's special event travelers tended to:
 - *Be skewed female*
 - *Have a larger household size*
 - *Be more upscale in terms of education and income*
 - *Include more Caucasians*

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ Outdoor vacations to Arkansas increased from year to year:
 - ◉ *In 2015 the state attracted 1.83 million outdoor vacationers, up 13% from 1.61 million the year before, and the highest number since this tracking began.*
 - ◉ *Market share of national outdoor trips rose to 1.6% in 2015, giving Arkansas a ranking of 29th place for this type of travel – about the same share as states such as Kentucky, Indiana , Alabama, and South Carolina*
- ◉ The length of stay in Arkansas on this type of trip averaged 2.8 nights, or 67% of a typical trip that averaged 4.2 nights away from home.
- ◉ People on Arkansas outdoor trips remained fairly frugal, spending an average per person of only \$118 while in the state – up from \$104 in 2014:
 - ◉ *this translates into about \$42 per person a day.*
- ◉ The Arkansas outdoor travel party in 2015 averaged 3.6 people, including 2.5 adults and 1.1 children:
 - ◉ *Down versus 2014 when the total was 4.3 people per party*
 - ◉ *Remaining above the Arkansas leisure norm of 3.2 people (total)*

Profiles of Arkansas's Key Overnight Leisure Segments



- The majority of people coming to Arkansas on an outdoor vacation arrived using personal transportation, mainly driving their own car or a camper/RV:
 - *Only 11% of outdoor vacationers in 2015 flew in*
- The primary types of accommodations for this segment in 2015 were hotels/motels (38%), campgrounds (33%), rented homes/cottages/cabins (21%) and B & B's (15%)
- Outdoor recreation was the main focus of this group's activity and attraction list – the top activities of this segment in 2015 were:
 - *Hiking/backpacking, camping, fishing, visiting a national/state park, swimming, boating/rafting, going to the beach, mountain climbing, hunting, casino, etc.*
- Conversely, they were less likely than other Arkansas tourists to:
 - *Go shopping*
 - *Visit a museum, an art gallery or attractions like a landmark/historic site, brewery, winery, fair/festival, theater, spa, etc.*
 - *Dine in finer restaurants*
- Interestingly, outdoors vacationers were no more likely than people in the other segments to indicate that one of their specific interests for their trip was eco-tourism – only 1 in 10 in each of the three main segments list this as a primary interest

Profiles of Arkansas's Key Overnight Leisure Segments



- Geographically, about three-quarters of Arkansas's outdoors vacationers in 2015 came from out-of-state, with the highest numbers coming from Texas, Missouri, Oklahoma, California, and Louisiana.
- They were above average in terms of planning their trip in advance – 6 in 10 started planning at least two months ahead of travel.
- However, they were less reliant on both traditional travel agents and online travel agencies in terms of information gathering or trip booking.
- Arkansas outdoors vacationers were the group most likely to bring a laptop while traveling, but least likely to carry a tablet or smartphone.
- They rated their overall trip experience very positively, like the other top segments.
- Among the three main marketable leisure segments, outdoors vacationers to Arkansas were the group most likely to have visited the state at some point in the past, including 7 in 10 who said they visited in the past year.
- They also seem to be above average in their broad use of social media to plan and discuss travel in general.

Profiles of Arkansas's Key Overnight Leisure Segments



- ◉ Arkansas outdoor vacationers were similar to the average Arkansas leisure visitor with respect to:
 - ◉ *Household income*
 - ◉ *Race/ethnicity*
- ◉ There were some differences between Arkansas's outdoors vacationers and the state's average vacationer:
 - ◉ *Skewed slightly male*
 - ◉ *Younger (39 years versus the norm of 43)*
 - ◉ *A higher proportion of singles*
 - ◉ *Slightly larger households/more kids living at home*
 - ◉ *Lower levels of education*
 - ◉ *More likely to be in the paid labor force*

Conclusions and Implications



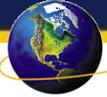
- On balance, 2015 was a good year for travel and tourism in Arkansas.
- The most positive news was that visitor volume rose by 2% over 2014 to a new record of 19.6 million overnight visitors.
- The increase was led by growth in visits to friends and relatives and combined business-leisure trips, up 3% and 7% respectively:
 - *An all-time high for combined business-leisure travel to the state*
- At the same time, the marketable leisure trip segment remained strong:
 - *at 8 million marketable trips, maintaining the record pace set in 2014*
- Despite the stall in growth of marketable trips in 2015, Arkansas has kept pace with the national rebound since the recent recession – from the low point in 2009, marketable trips have grown by 22% nationally, and 20% for Arkansas.
- Business travel to Arkansas in 2015 also maintained the previous year's volume, which was a new high:
 - *Arkansas business travel has grown 7% since its low point in 2010, while there has been a decline of 19% on a national basis*

Conclusions and Implications



- Other notable positive results for 2015 included:
 - *In the marketable leisure segment, touring, outdoors, and special event trips to the state experienced significant growth:*
 - *Outdoor trips reached new highs and the volume of touring trips has almost recovered to pre-recession levels*
 - *Visitor expenditures in the state remained at \$3.5 billion, just shy of the record high of \$3.61 billion set in 2008 prior to the recession.*
 - *One of the five key business sectors normally associated with travel/tourism benefited from the growth in 2015 in visitor spending – spending in the lodging sector grew by 5%.*

Conclusions and Implications



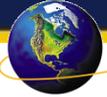
- The average length of stay by visitors continues to average about 3 nights.
- The number of day trips to or within Arkansas fell by 3% in 2015, in contrast to the positive national trend of 2% growth
- Nonetheless, higher per capita spending meant that total day trip expenditures in Arkansas were essentially flat, at \$1.8 billion on a year over year basis:
 - *The retail sector was the only sector to see an increase in visitor spending; restaurant food/beverage was flat; and expenditures on recreation and transportation posted declines*

Conclusions and Implications



- The main challenges and opportunities presented in 2015 included:
 - *Although overnight visitors spent more on lodging and about the same on most other purchases in 2015, they spent less on transportation – this most likely relates to the price of gas over which APT has little control*
 - *For targeting purposes, the demographic profiles of overnight and day visitors remained stable from year to year*
 - *And markets are still regional, with primary markets continuing to be the neighbor states of Texas, Missouri, Oklahoma, Louisiana, and Tennessee*
 - *The average length of stay among Arkansas visitors continues to be lower than the national norm. Efforts to increase people's length of stay, and thereby, higher expenditures should continue to be a priority.*
 - *Mobile devices, including the smart phone and tablet, are becoming essential tools for gathering information and booking aspects of a trip before/during travel.*

Conclusions and Implications



- In summary, these results confirm that Arkansas has been keeping pace with the gradual national recovery in the travel sector.
- We continue to recommend:
 - *Marketing should focus on the highest value marketable segments of which touring vacations are the most numerous*
 - *Although the experiences sought by outdoors vacationers align well with Arkansas's "natural" product, these travelers are less upscale and spend far less than almost all other segments except people visiting friends and relatives – we continue to recommend that this group be a low priority*
 - *Recognizing that APT's role is not to develop or promote individual events, it would be beneficial that vacationers know about as many events, festivals, fairs, etc. as possible via APT's marketing materials, in order to increase Arkansas's image as a place with lots to see and do.*
 - *Enticing tourists to lengthen their stay and spend more money in the state is always a challenge. An experiential approach to the organization and presentation of routes, attractions and itineraries using thematic groupings, appears to be a "best practice" adopted by many top destinations in their brochures and online material*

Conclusions and Implications



- ◉ *Before the advent of mobile electronic devices, travelers had limited means of acquiring information about some of the key experiences that people seek on their trips – good places to eat, entertainment options, things to see and do that aren't just the famous places. Our research for other DMO's has suggested that people are increasingly using smart phones and tablets to research and book these and other activities "on the road". Therefore, ensuring that these travelers have an easy time accessing relevant real-time information could not only assist APT's co-op partners/in-state businesses to generate economic activity in the short term, but also contribute to longer-term perceptions of the state as a great place to visit again.*
- ◉ *Focus marketing primarily in the neighbor state region.*
- ◉ *Half of Arkansas vacationers start planning their trip at least two months ahead of time, including over a third who start planning 3 to 5 months in advance. Therefore a three month lead in media buy is advised, e.g., for a campaign designed to generate travel starting in June, consider a launch in March.*

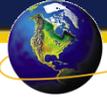


Main Findings

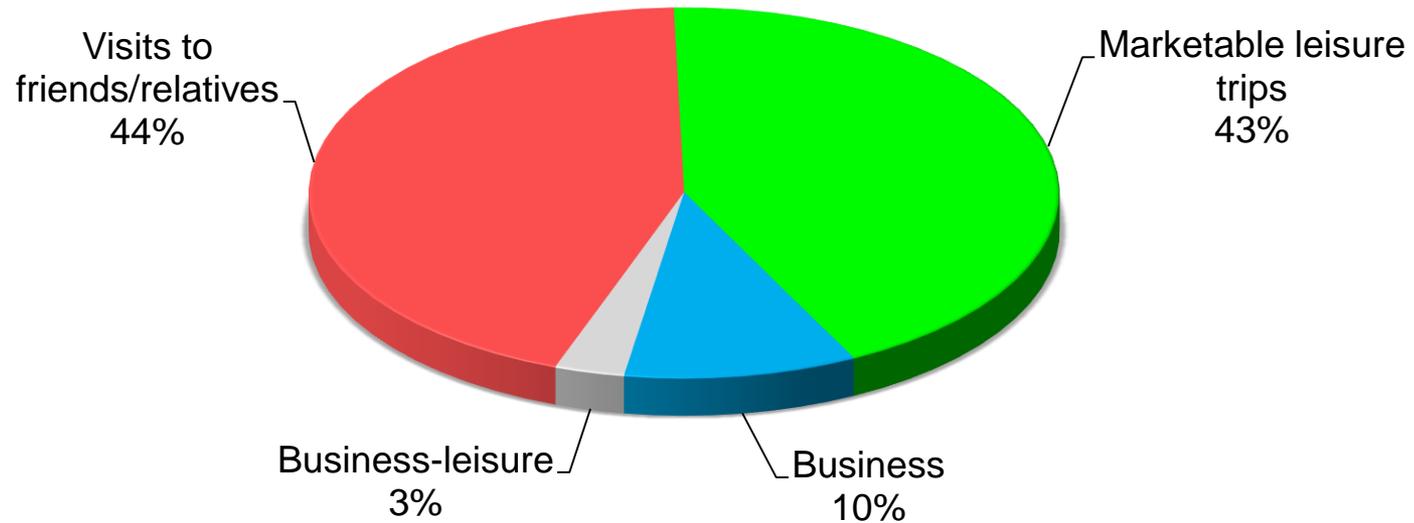


U.S. Travel Market – Structure & Trends

Structure of the U.S. Travel Market – 2015 Overnight Trips



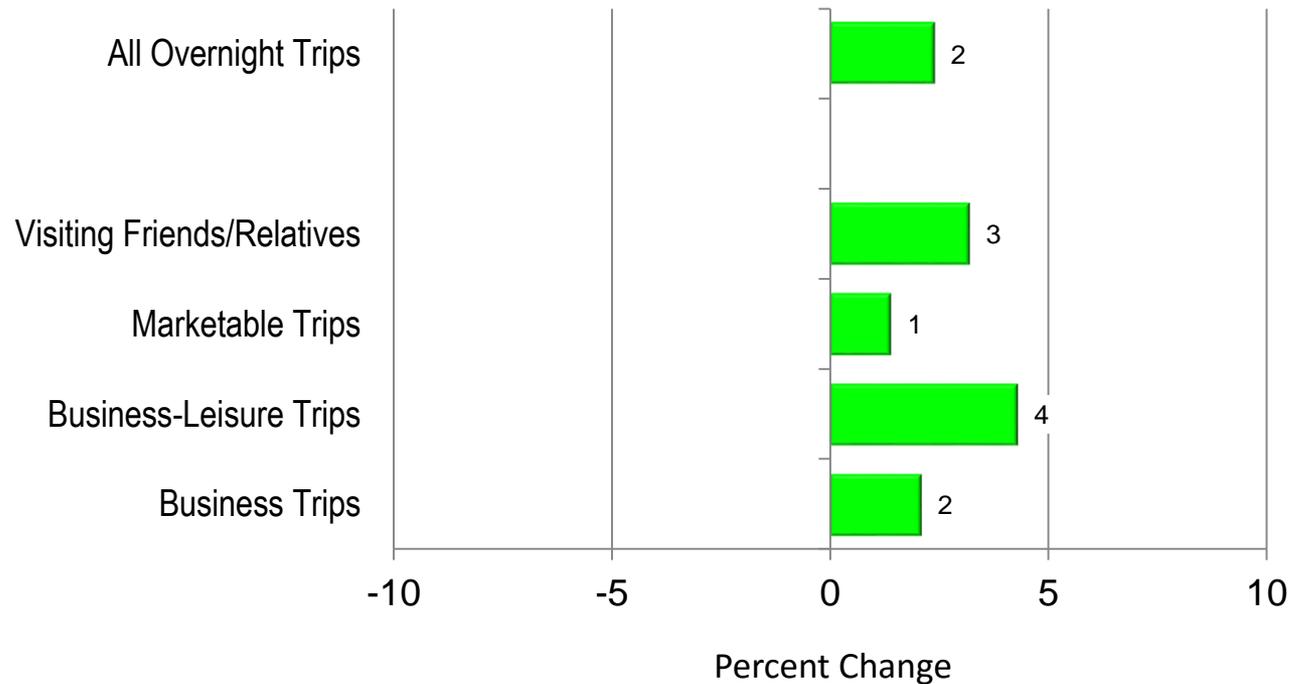
Base: Adult Overnight Trips



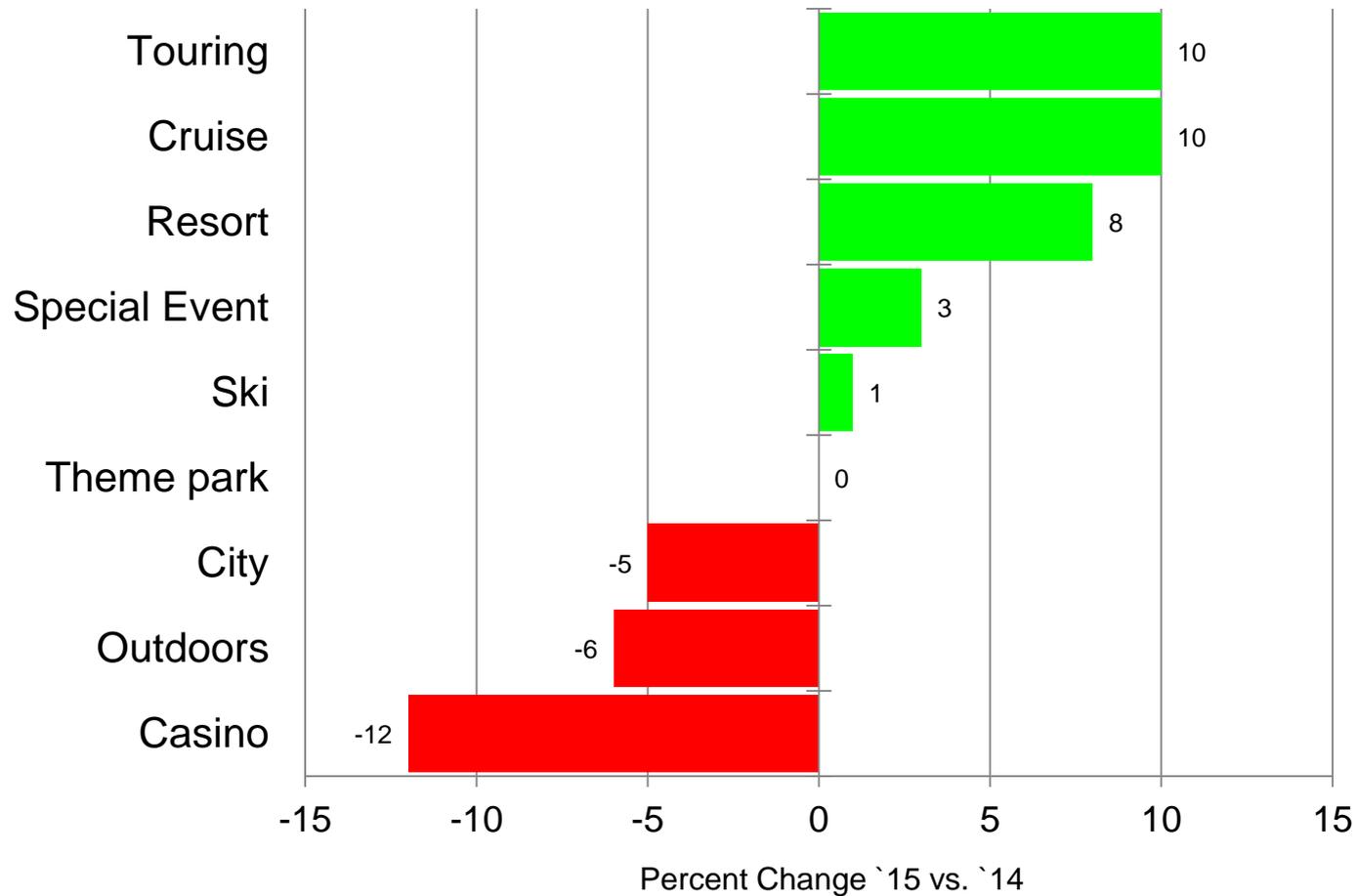
U.S. Market Trends for Overnight Trips – 2015 vs. 2014



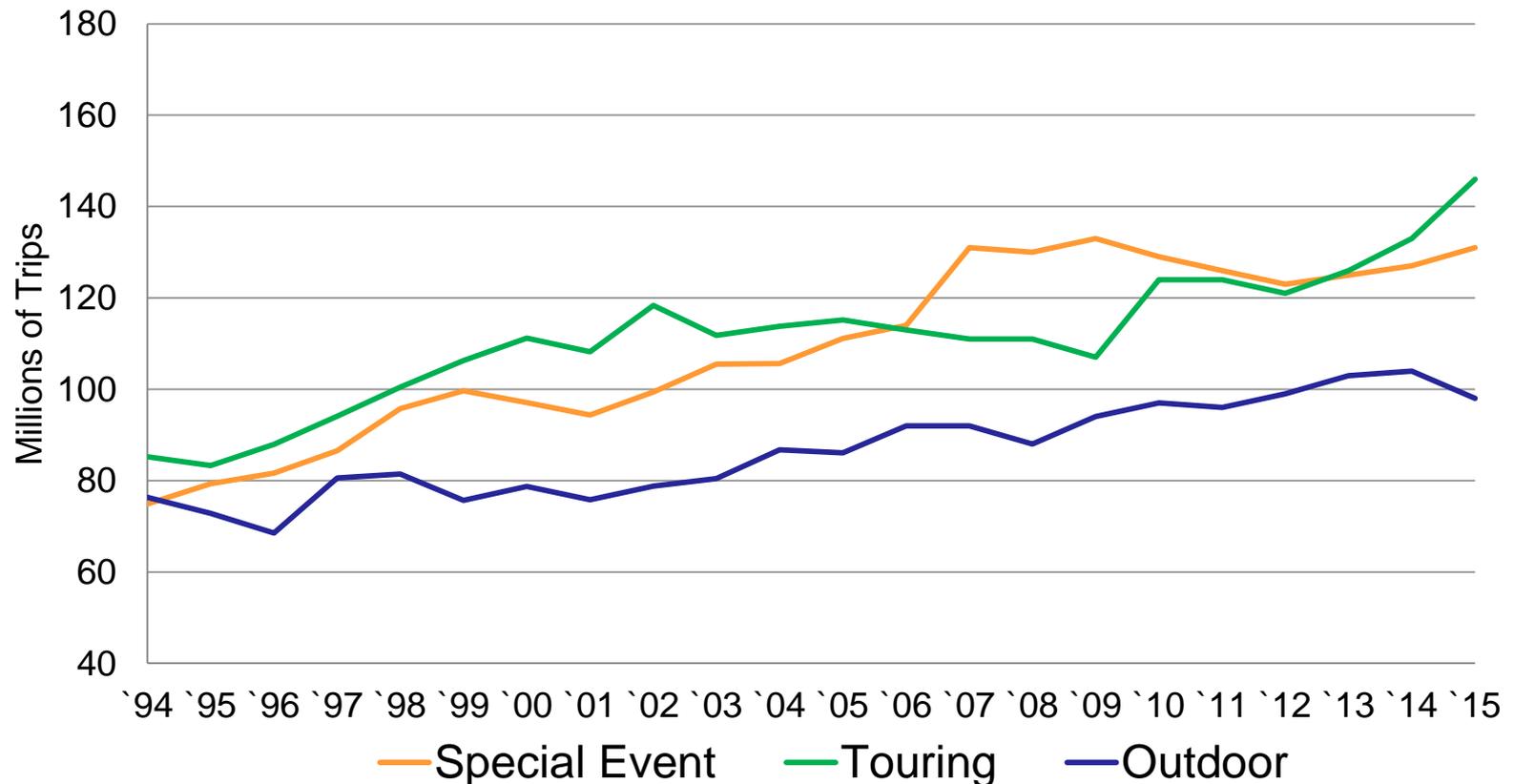
Base: Adult Overnight Trips



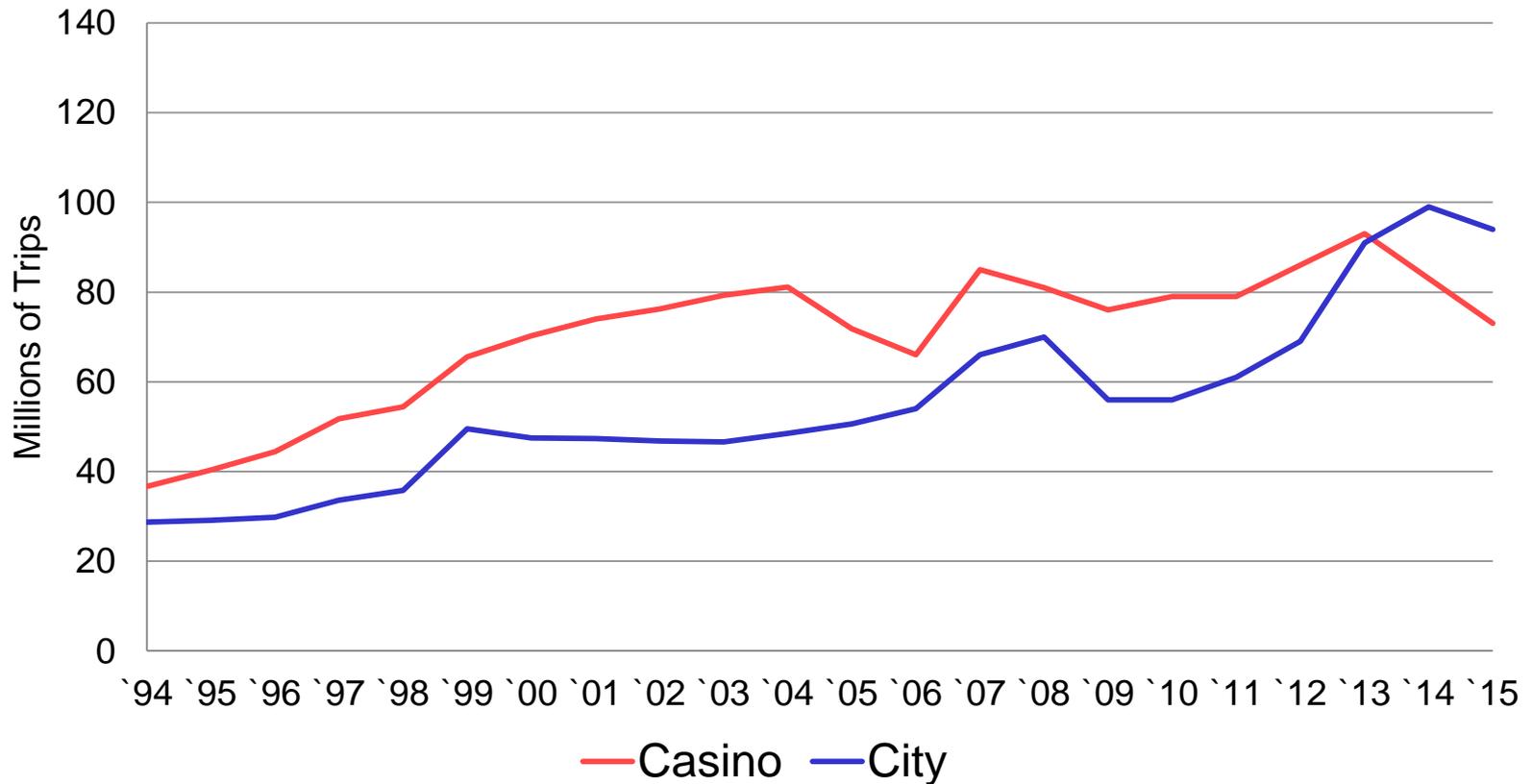
U.S. Overnight Marketable Trip Trends – 2015 Travel Year



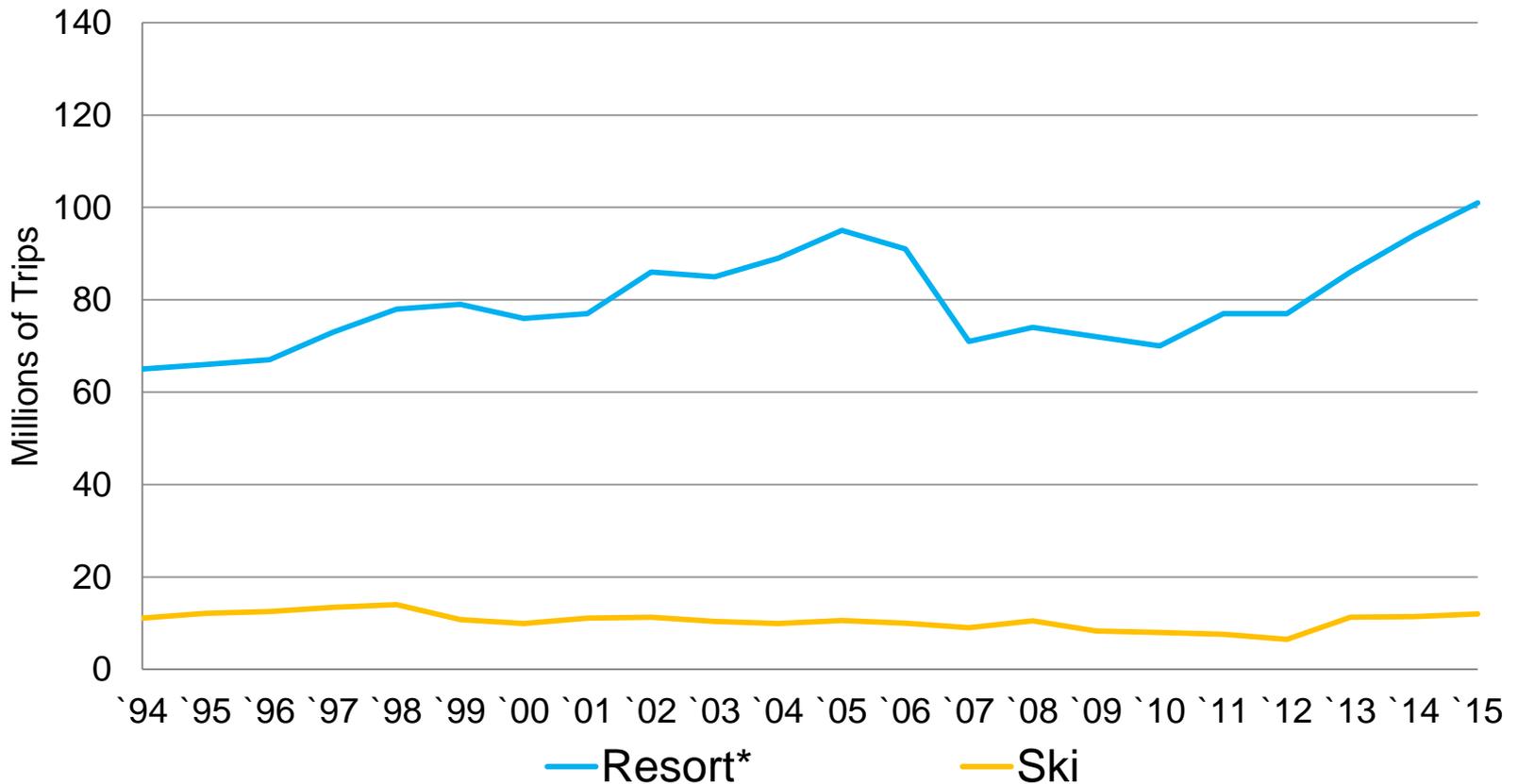
U.S. Marketable Trips – Key Marketable Segments



U.S. Marketable Trips – Casino & City Trips

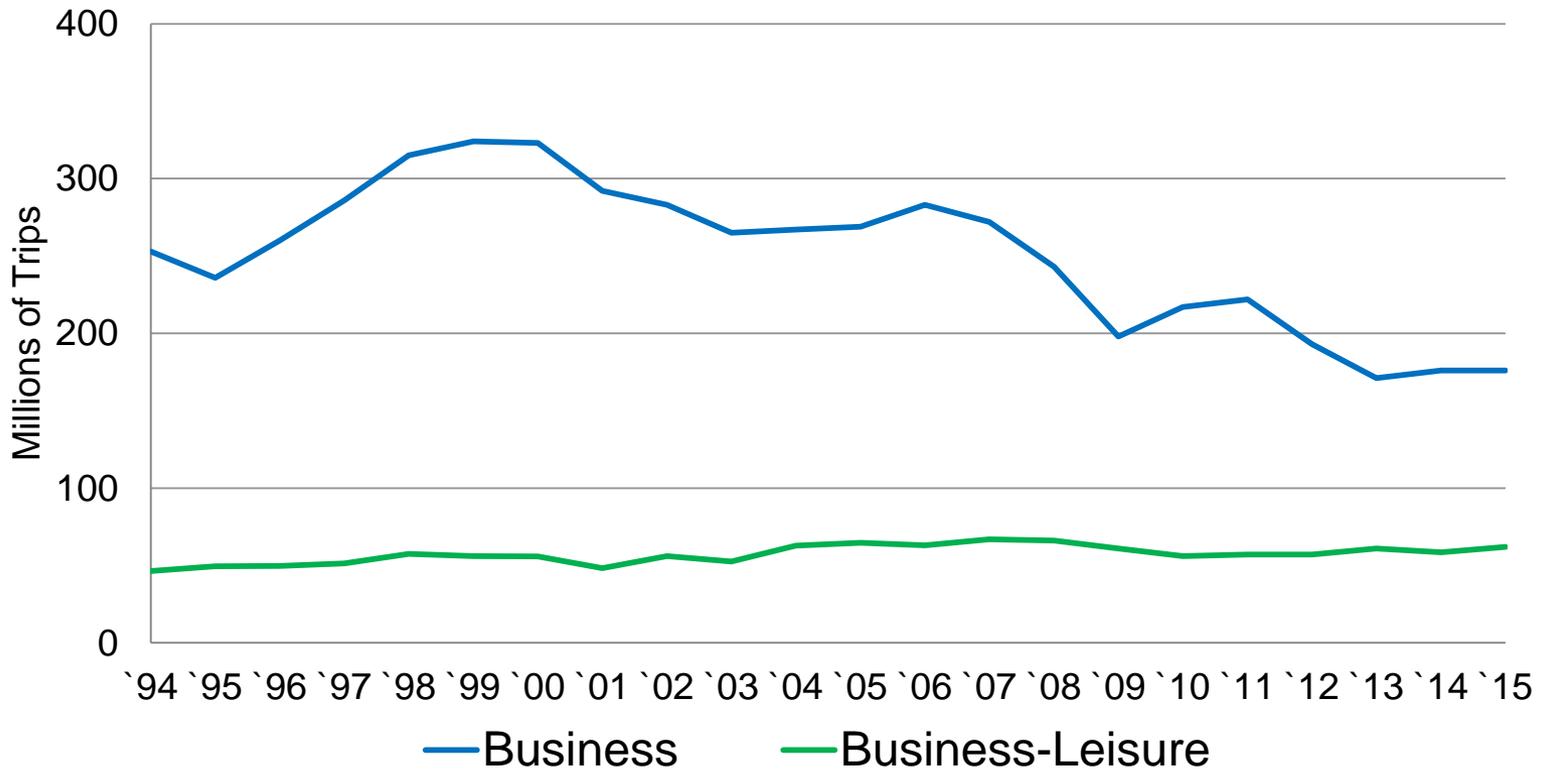


U.S. Marketable Trips — Resort* & Ski Trips

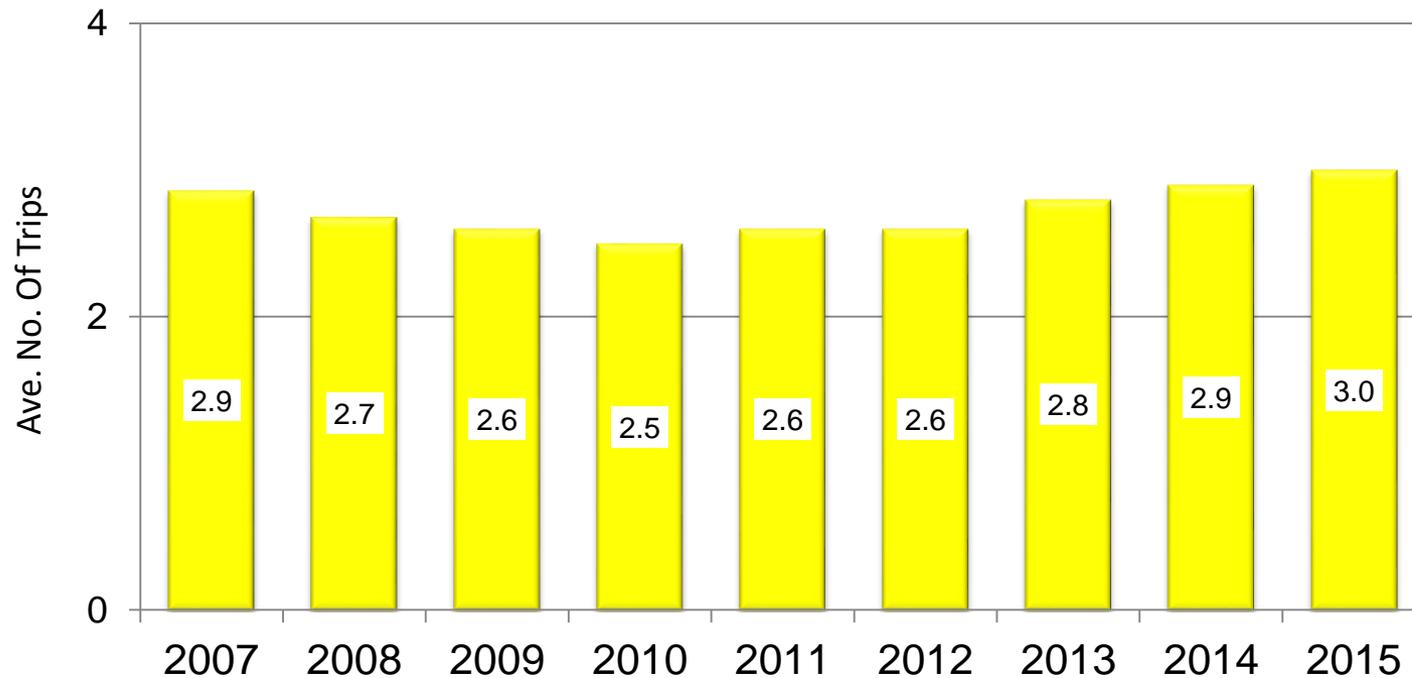


* Combines Country and Beach starting in 2007, and Resort and Golf in 2013

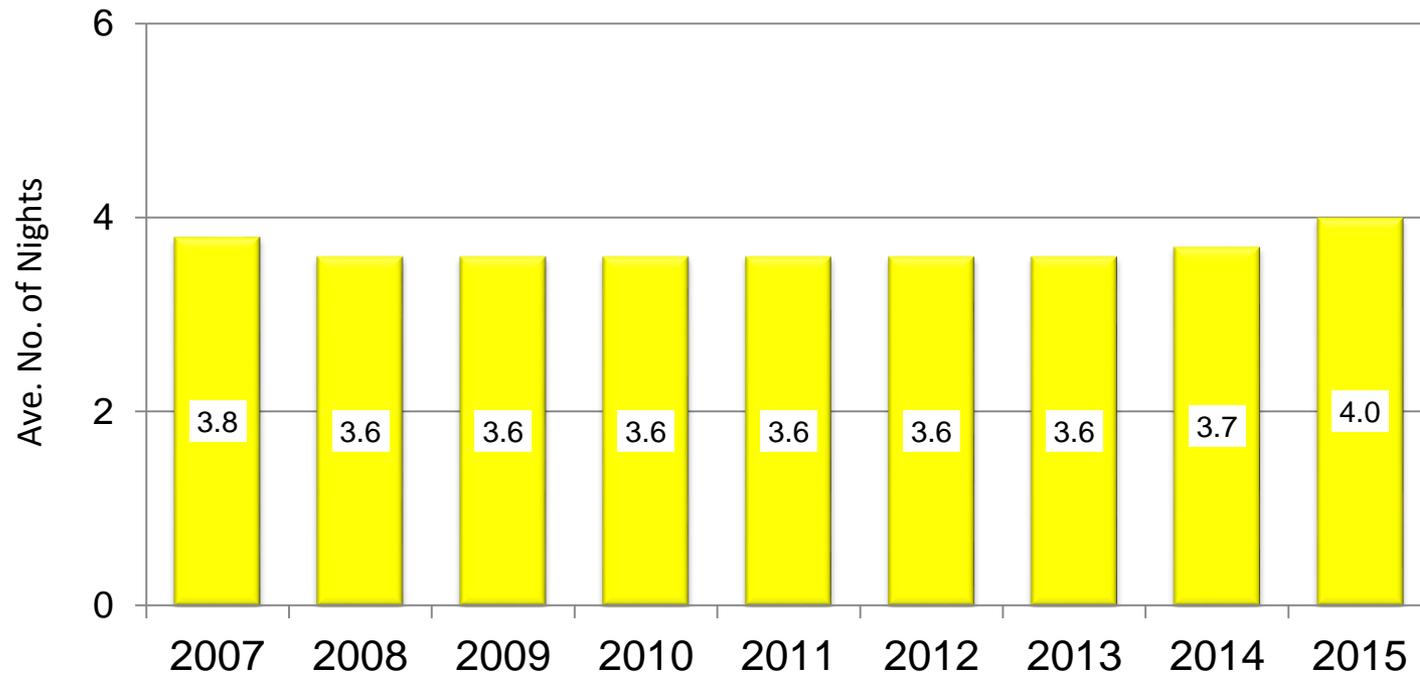
U.S. Business and Combined Business-Leisure Trips



Average Number of Overnight Trips Taken Per Quarter



Average Length of Overnight Trips



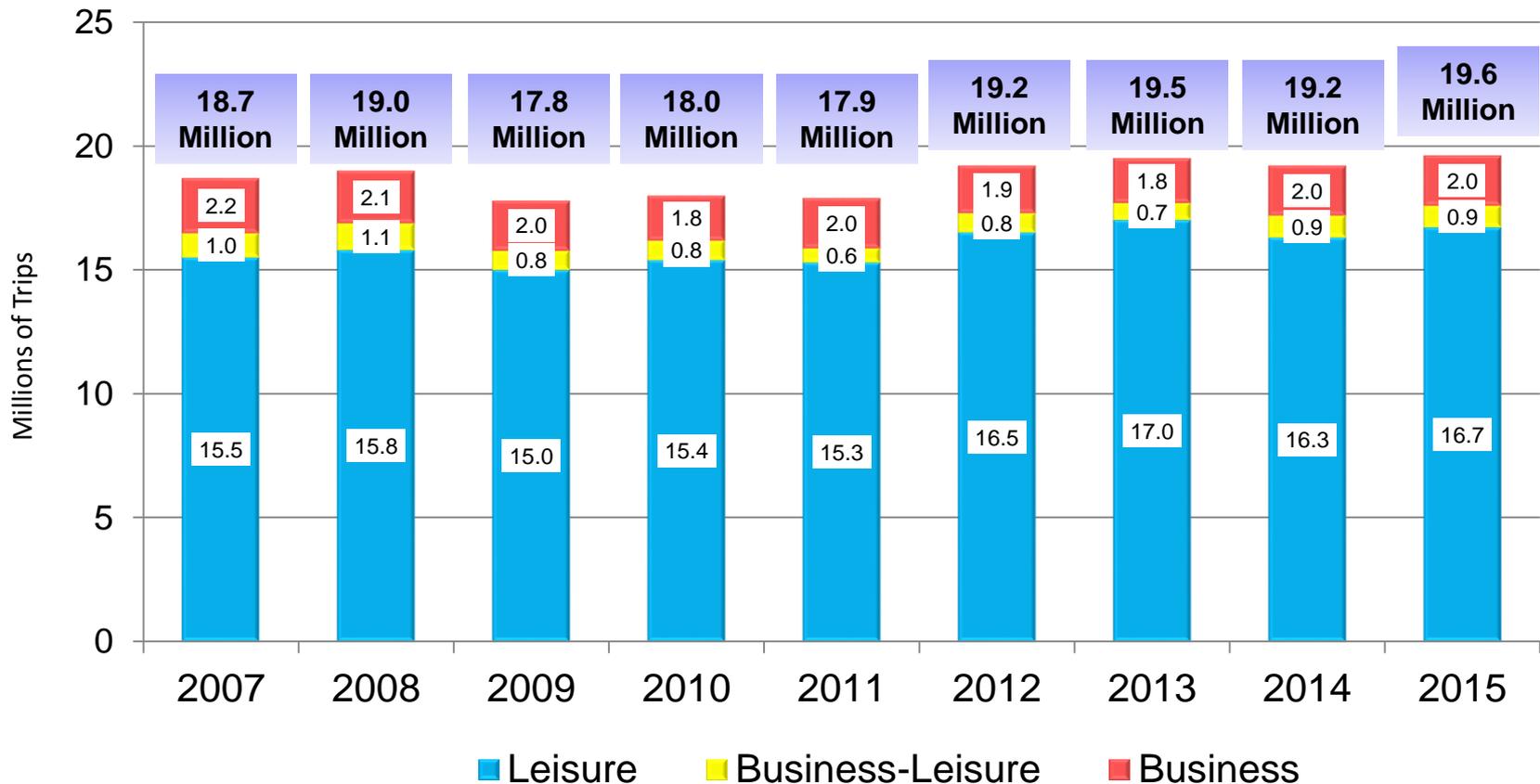


Overnight Trips to Arkansas

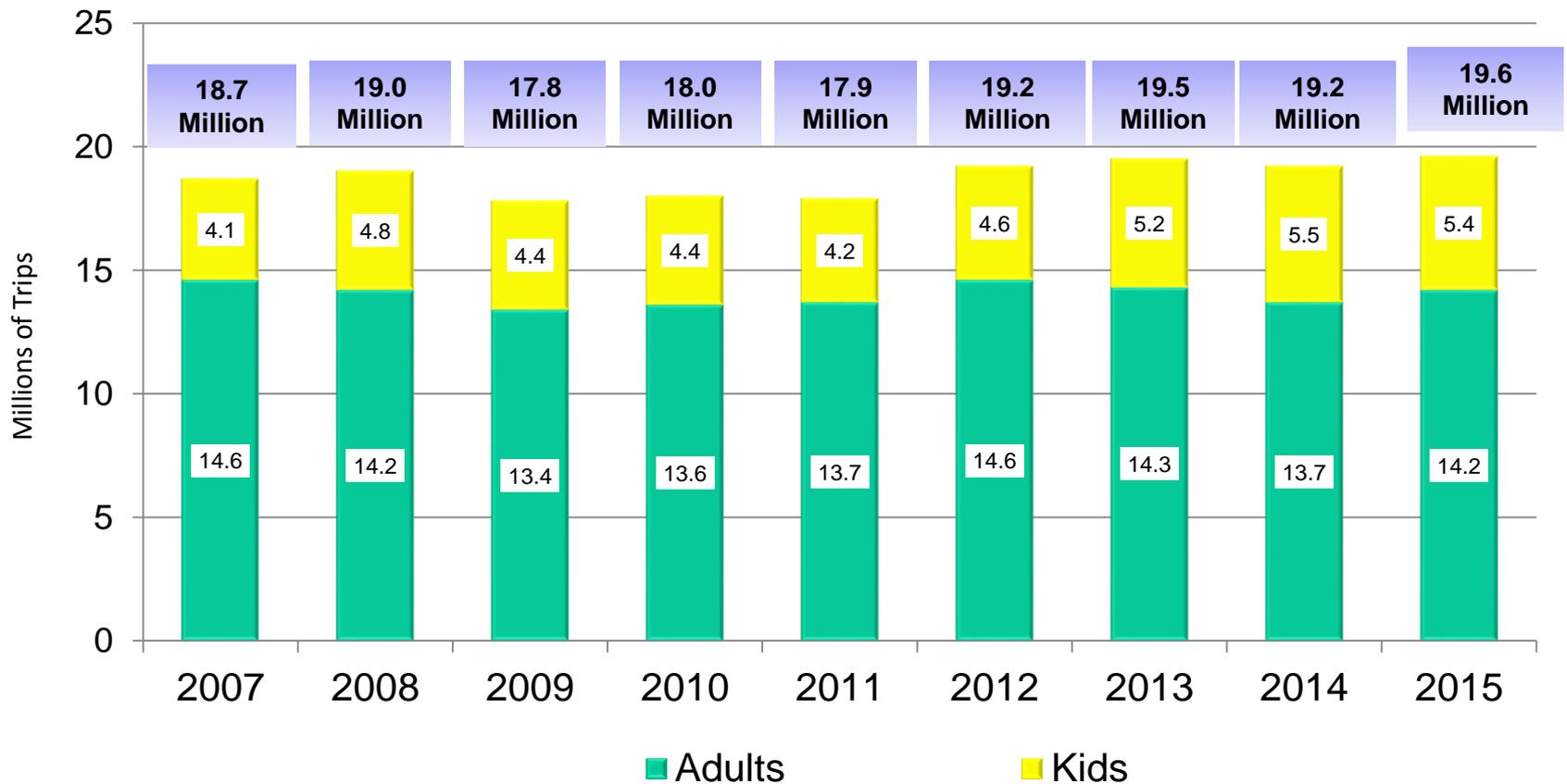


Overnight Trip Volume & Expenditure Estimates

Size of Arkansas's Overnight Travel Market



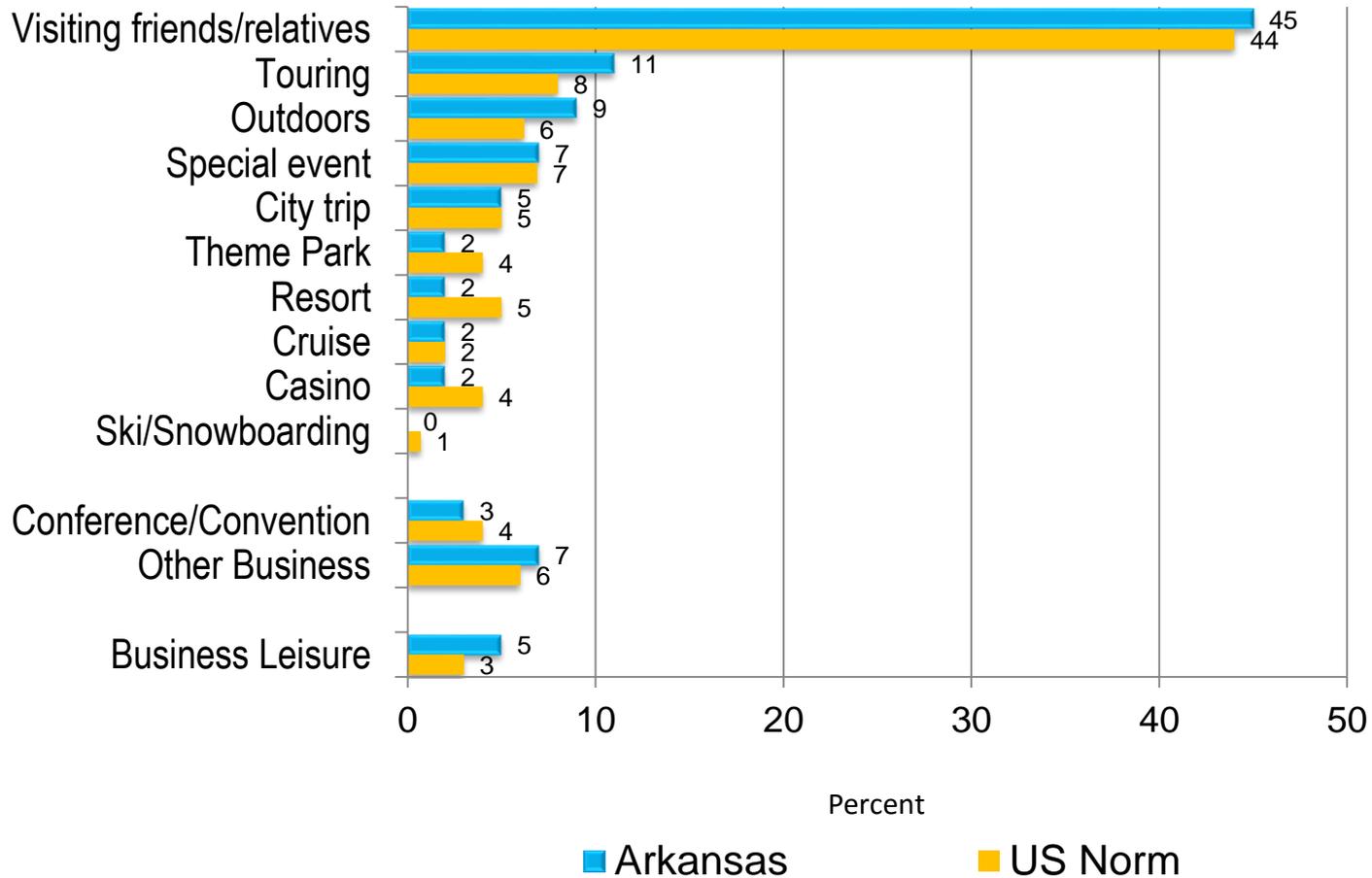
Size of Arkansas's Overnight Travel Market



Main Purpose of Trip



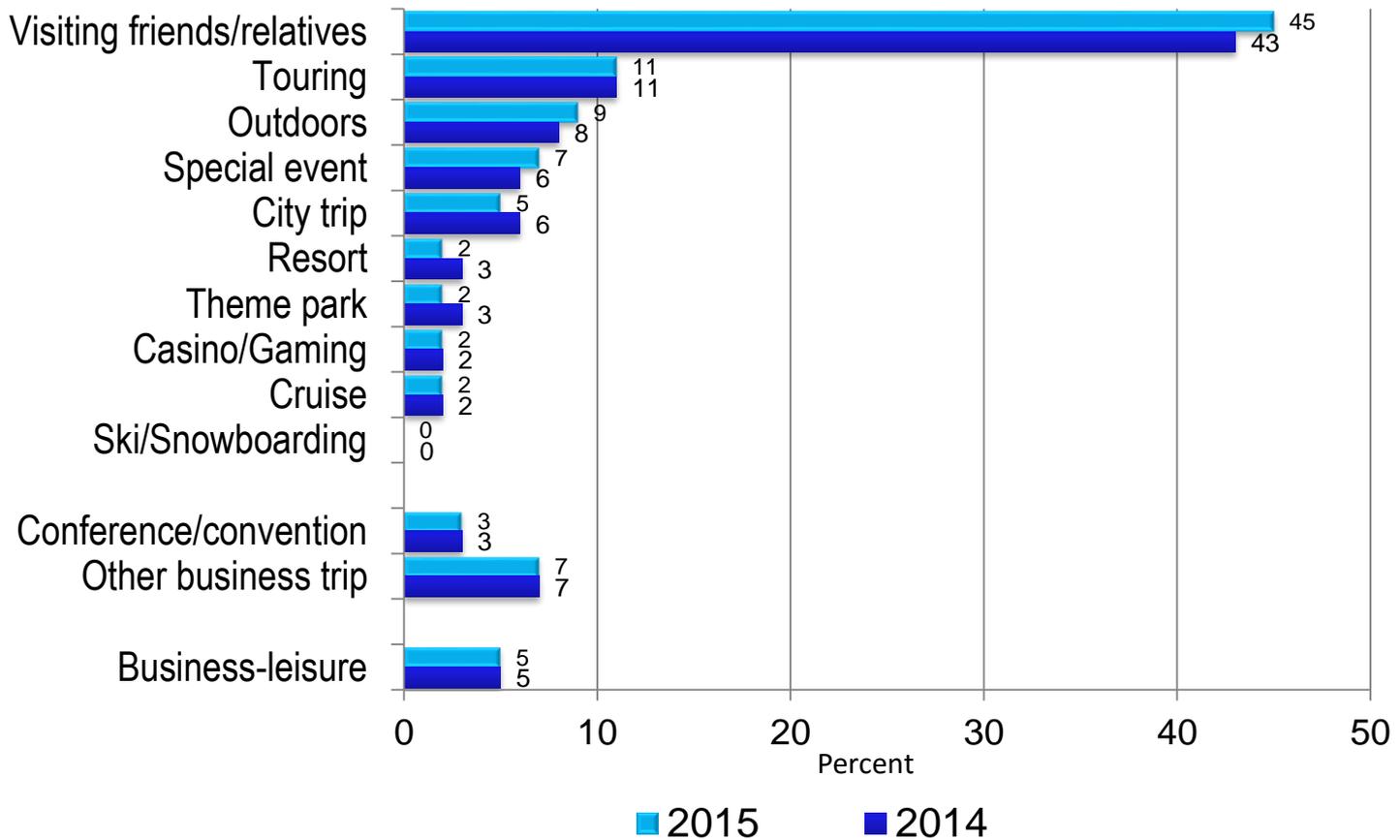
Base: Overnight Trips (Adults & Kids)



Main Purpose of Trip



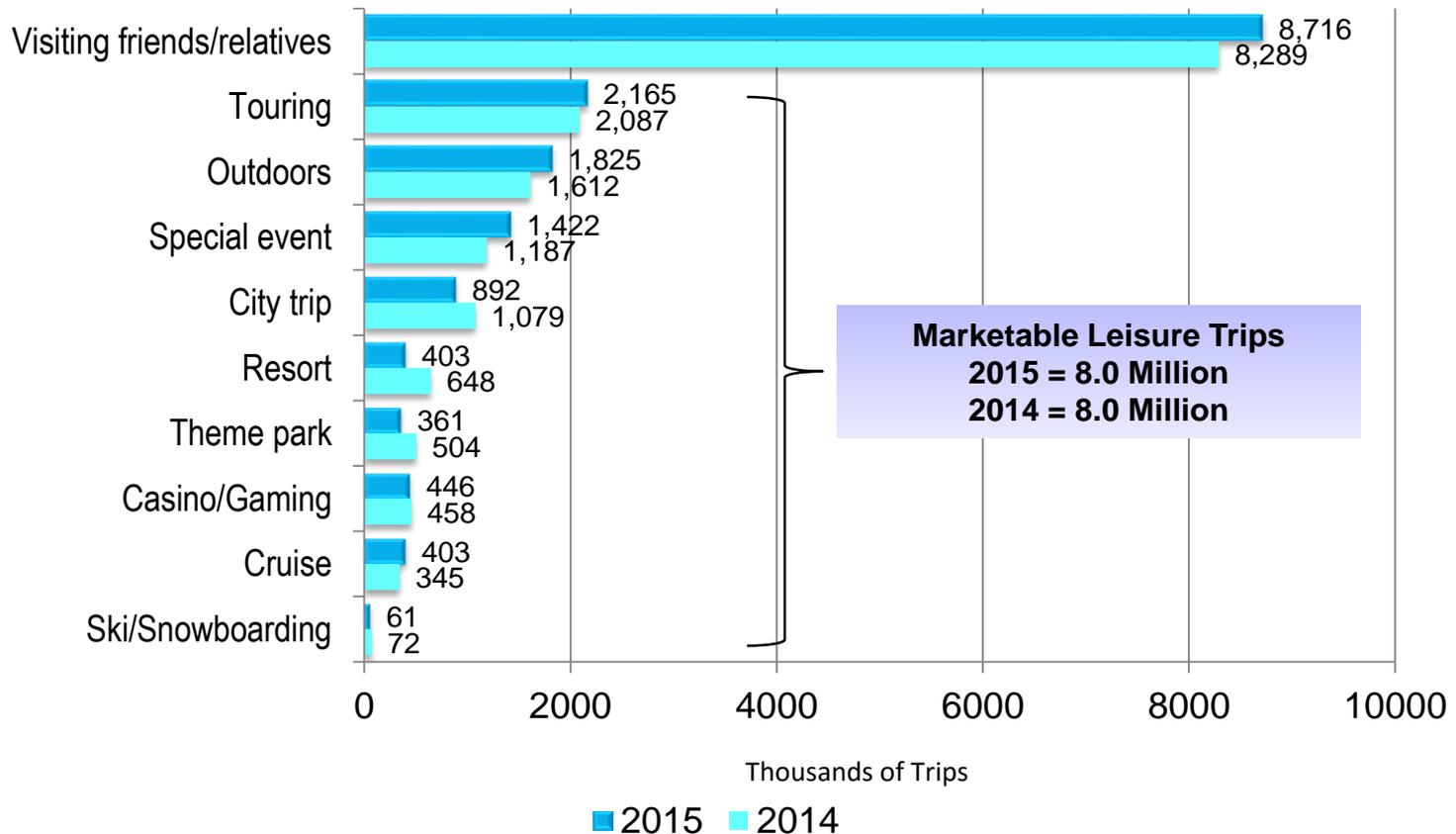
Base: Overnight Trips (Adults & Kids)



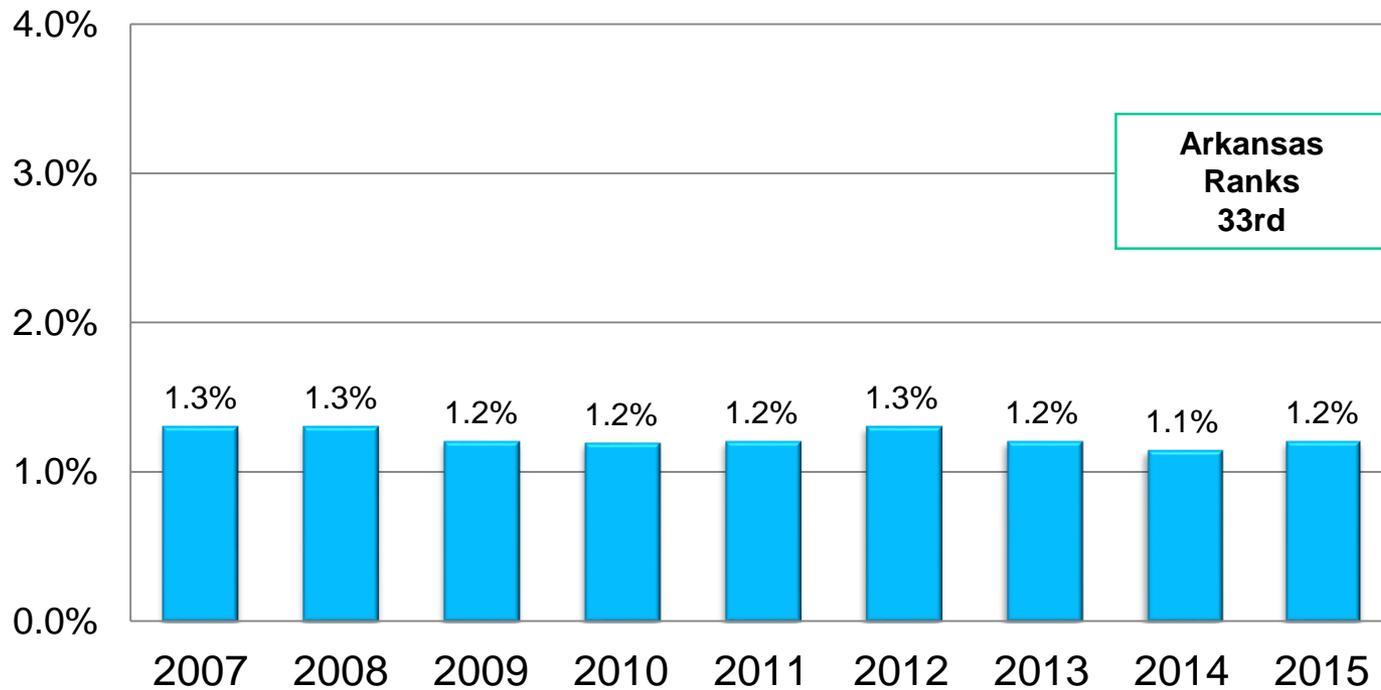
Volume Estimate by Leisure Trip Purpose



Base: Overnight Trips (Adults+Kids)



Arkansas's Share of Domestic Overnight Trips

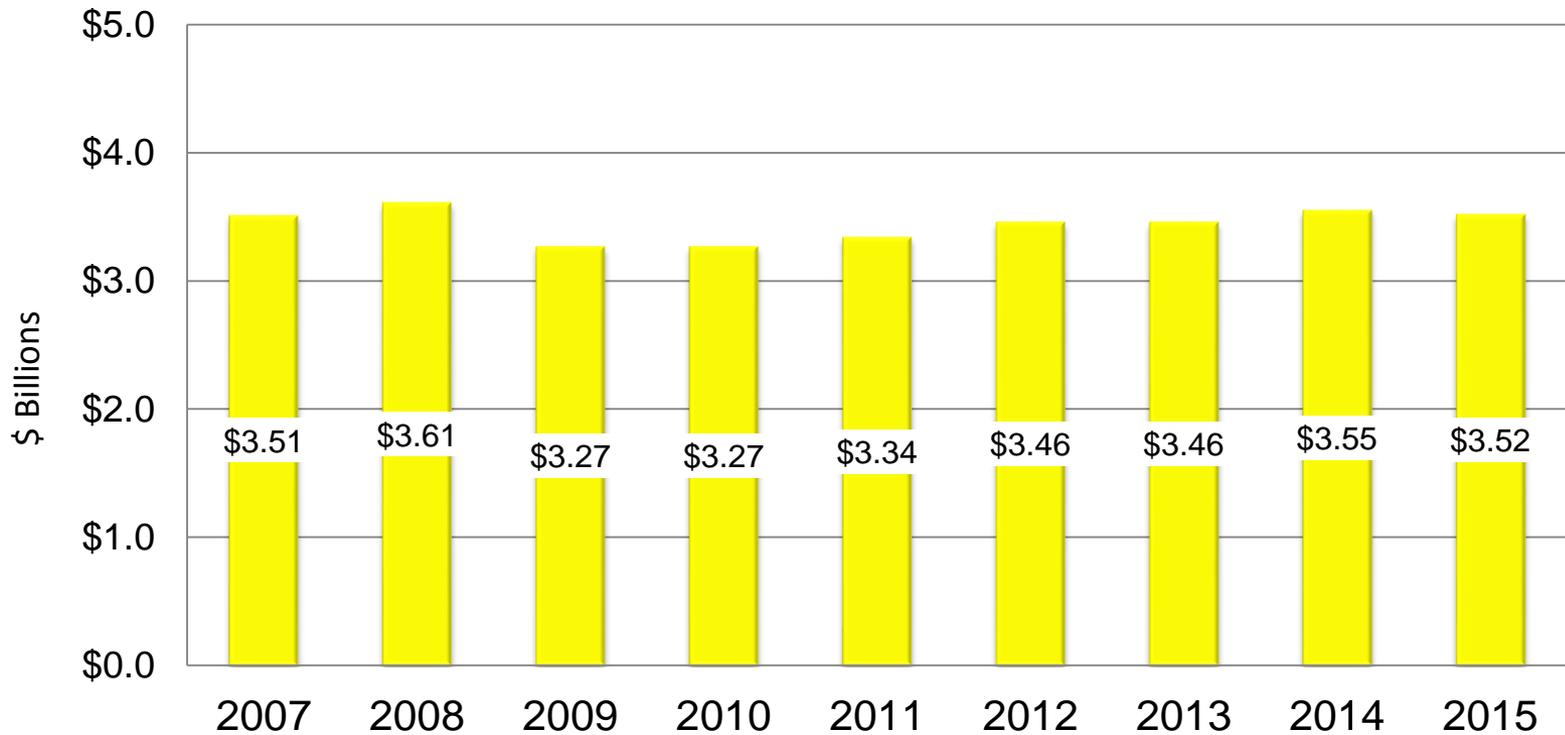


Arkansas's Share of All Overnight Trips in 2015



<u>State</u>	<u>Rank</u>	<u>Share</u>	<u>State</u>	<u>Rank</u>	<u>Share</u>
Florida	1	11.6%	Oregon	21	2.0%
California	2	10.7%	Wisconsin	22	2.0%
New York	3	7.0%	Indiana	23	1.8%
Texas	4	5.8%	Alabama	24	1.7%
Nevada	5	3.8%	Maryland	25	1.6%
North Carolina	6	3.5%	Louisiana	26	1.6%
Pennsylvania	7	3.5%	Minnesota	27	1.5%
Illinois	8	3.4%	Connecticut	28	1.3%
Georgia	9	3.3%	Kentucky	29	1.3%
New Jersey	10	3.1%	Hawaii	30	1.2%
Ohio	11	3.1%	Utah	31	1.2%
Virginia	12	2.8%	Oklahoma	32	1.2%
Tennessee	13	2.8%	Arkansas	33	1.2%
Colorado	14	2.7%	New Mexico	34	1.1%
Arizona	15	2.5%	New Hampshire	35	1.1%
Michigan	16	2.5%	Iowa	36	1.0%
Washington	17	2.4%	Maine	37	1.0%
South Carolina	18	2.4%	Kansas	38	1.0%
Massachusetts	19	2.3%	Nebraska	39	.9%
Missouri	20	2.0%	Mississippi	40	.8%

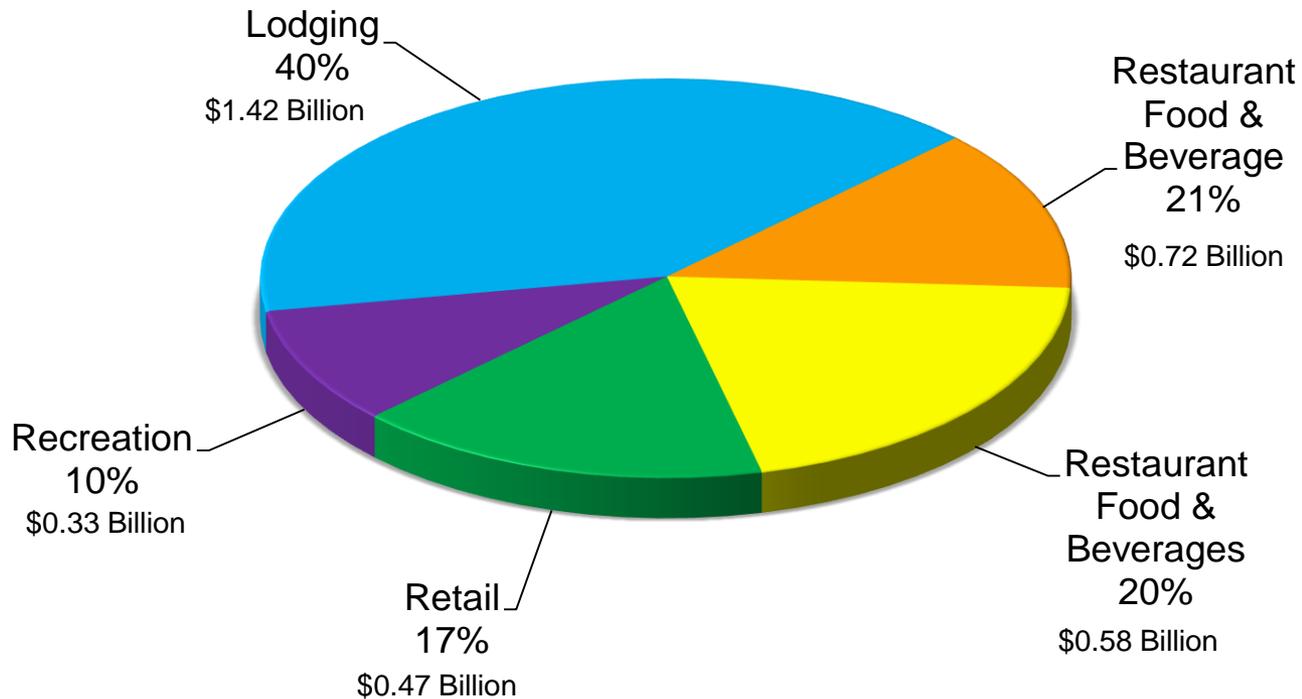
Total Spending on Overnight Trips to Arkansas



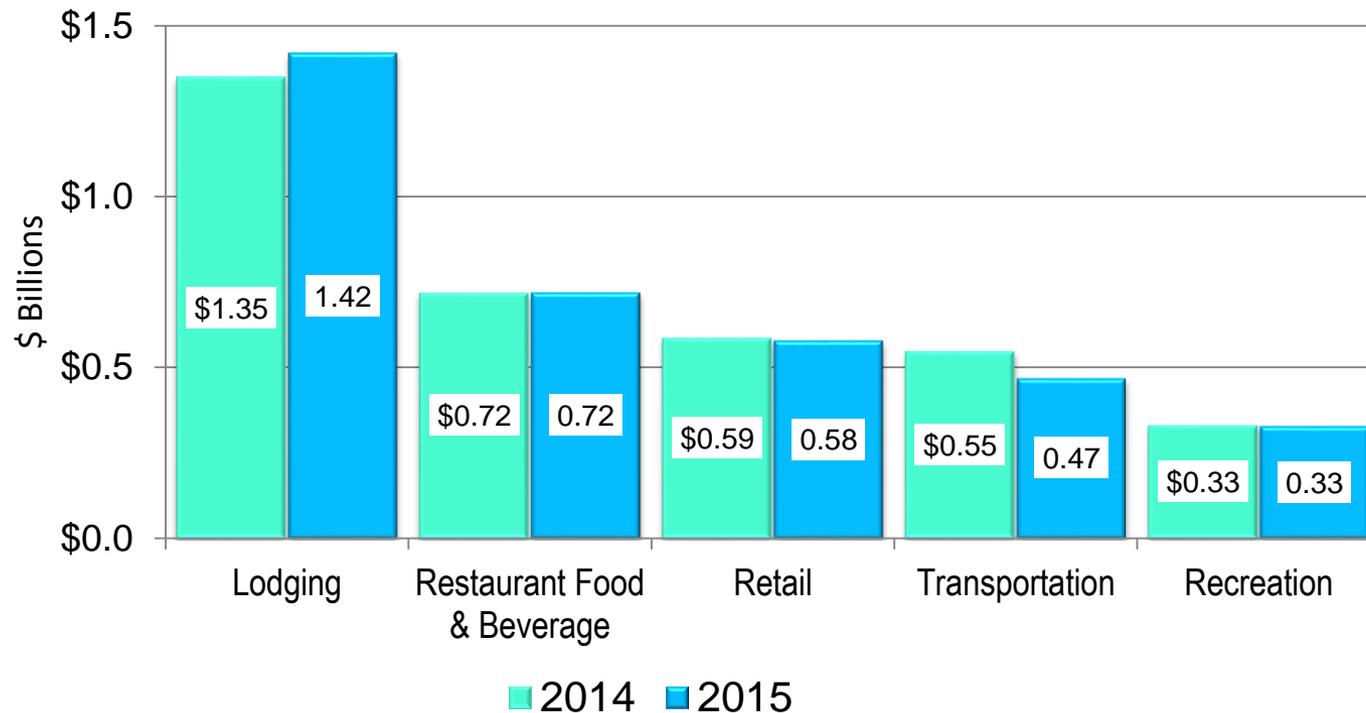
Total Spending on Overnight Trips to Arkansas — By Sector



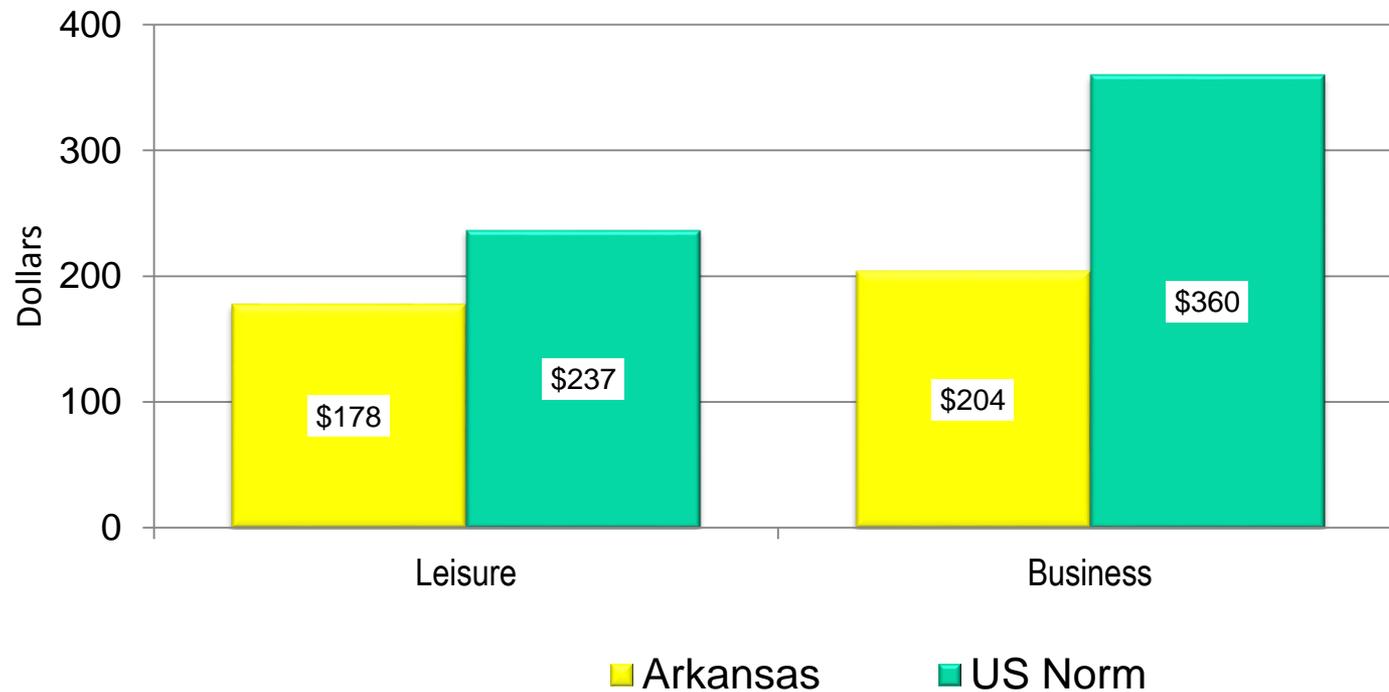
Total Spending = \$3.52 Billion



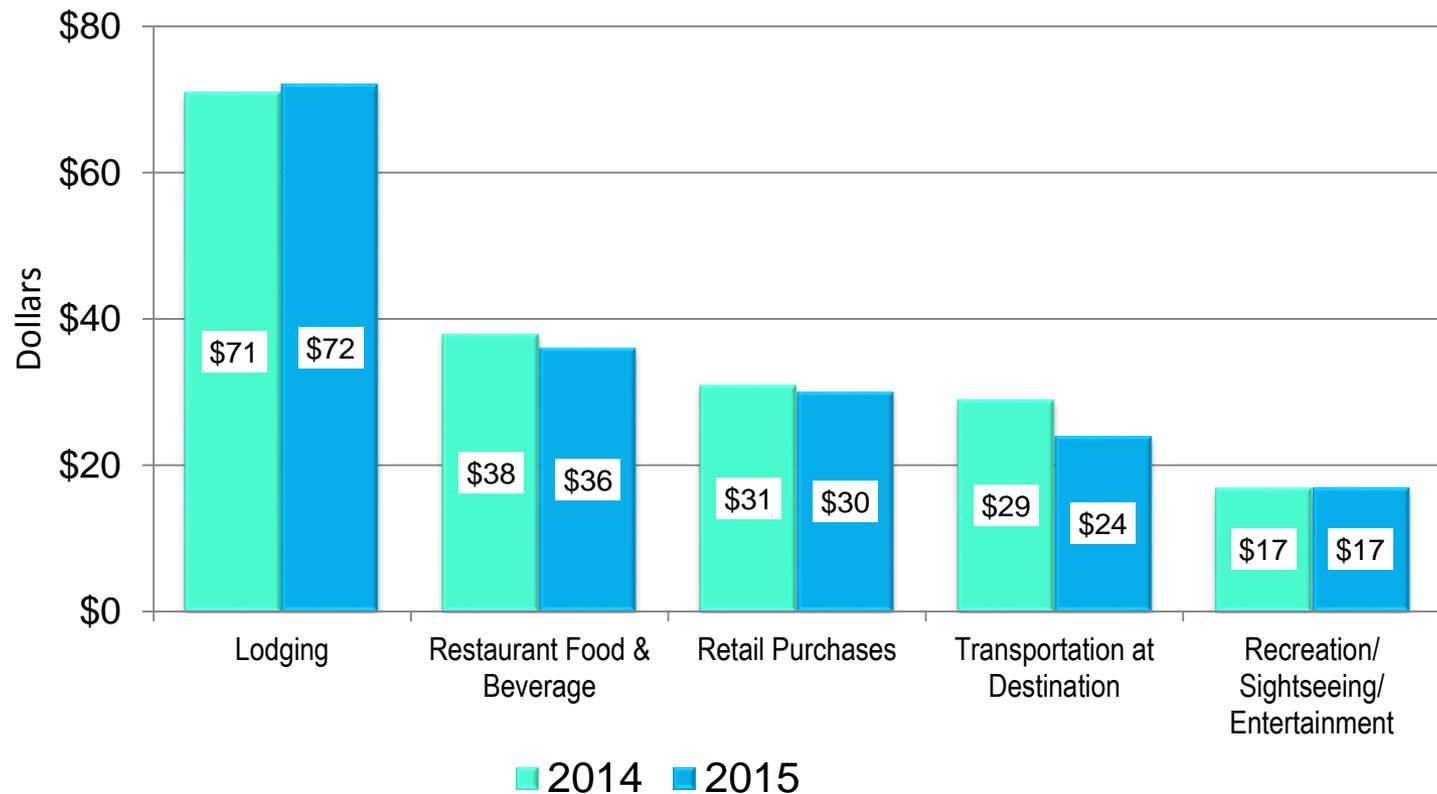
Total Expenditures on Overnight Trips – By Sector



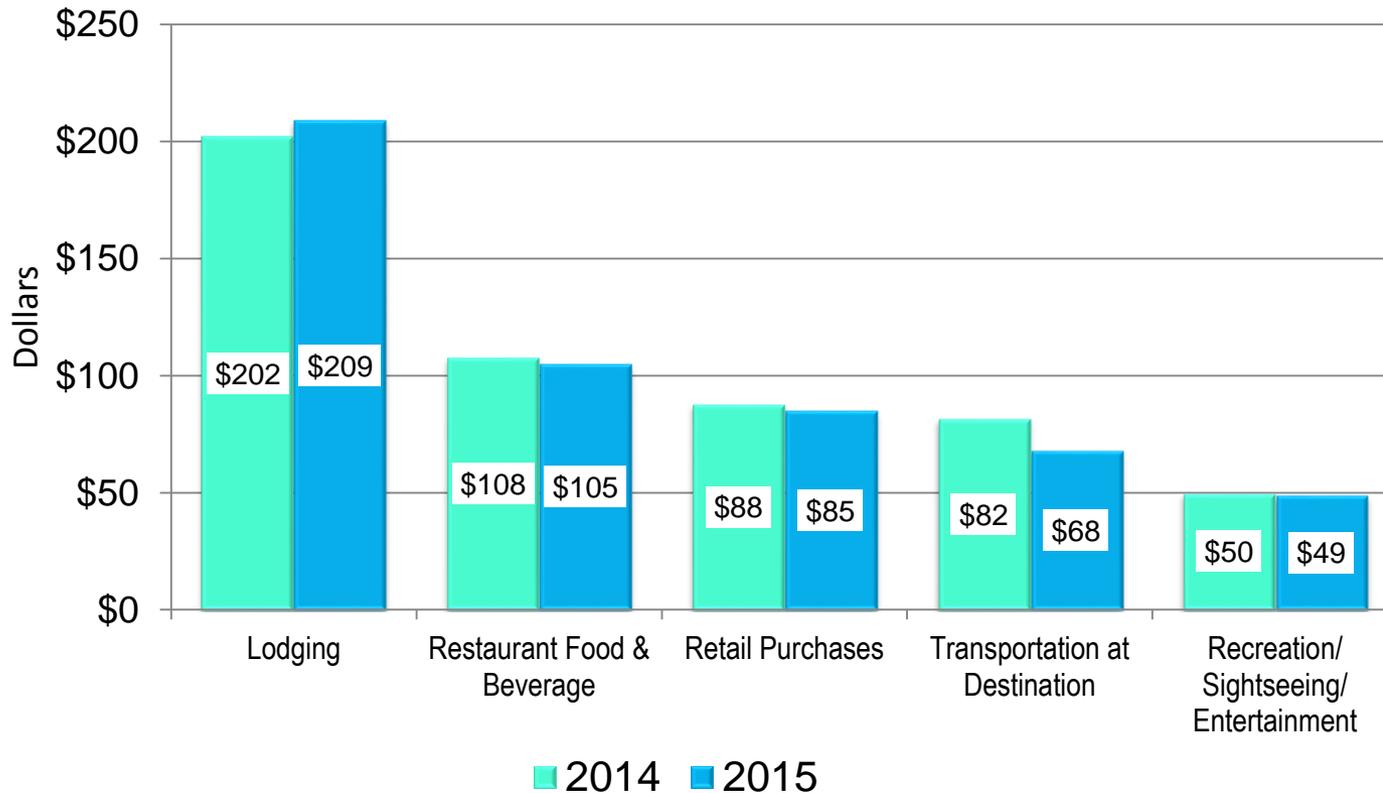
Average Per Person Expenditures on 2015 Overnight Trips – Leisure vs. Business



Average Per Person Expenditures on Overnight Trips – By Sector



Average Per Party Expenditures on Overnight Trips – By Sector



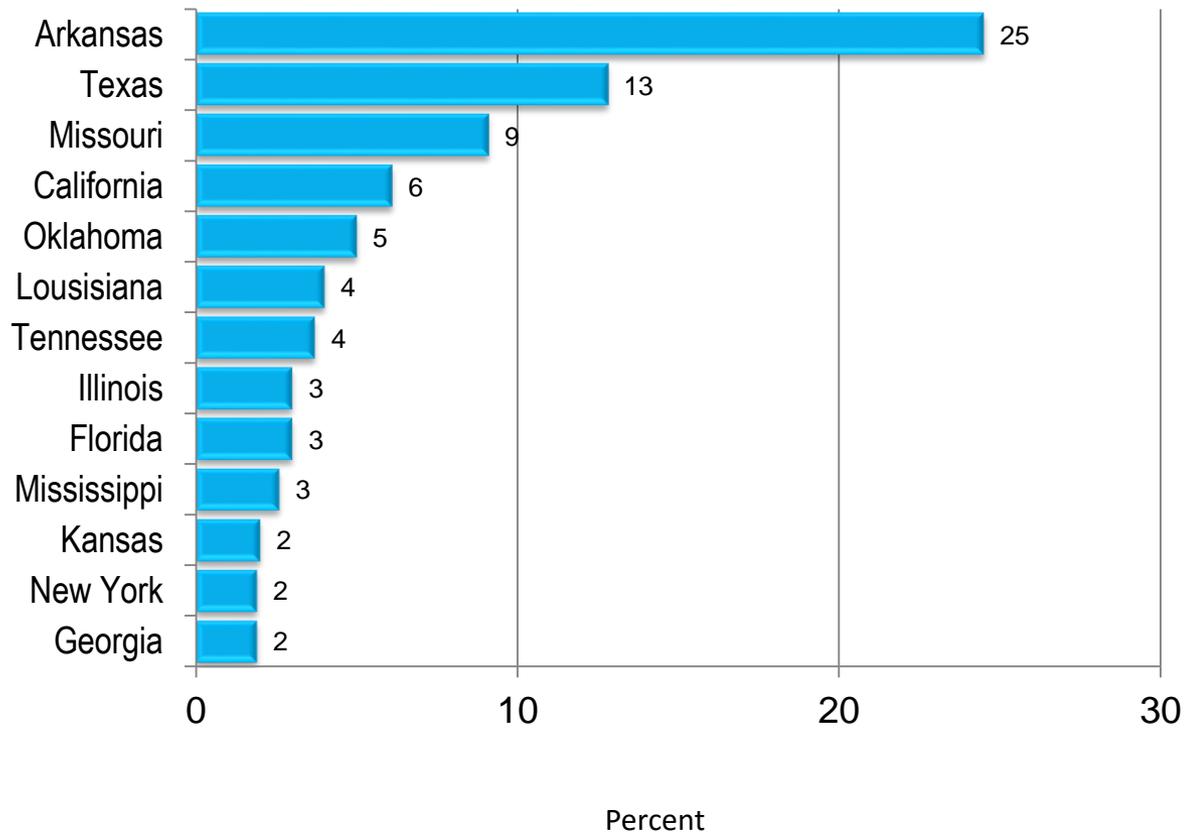


Overnight Leisure Trip Sources of Business

State Origin Of Trip



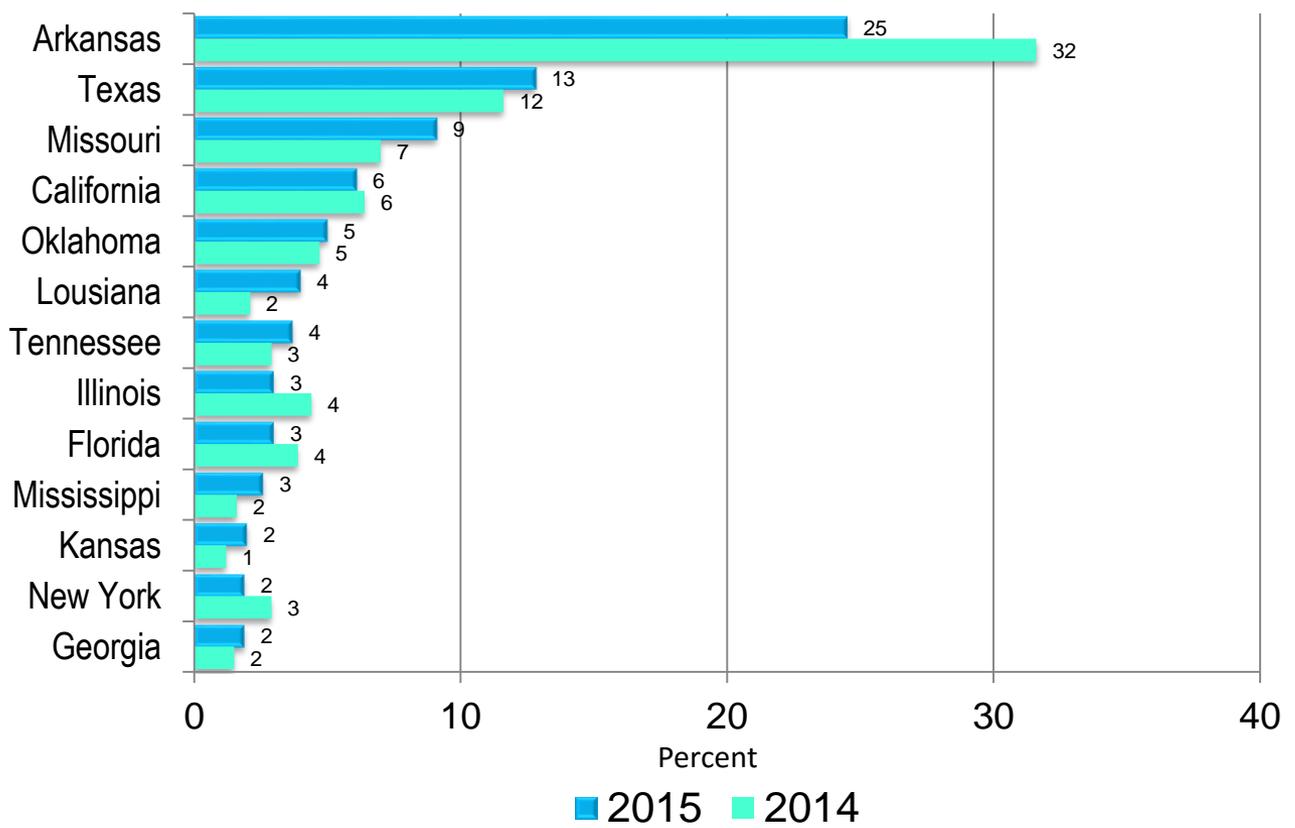
Base: Adult Overnight Leisure Trips to Arkansas



State Origin Of Trip



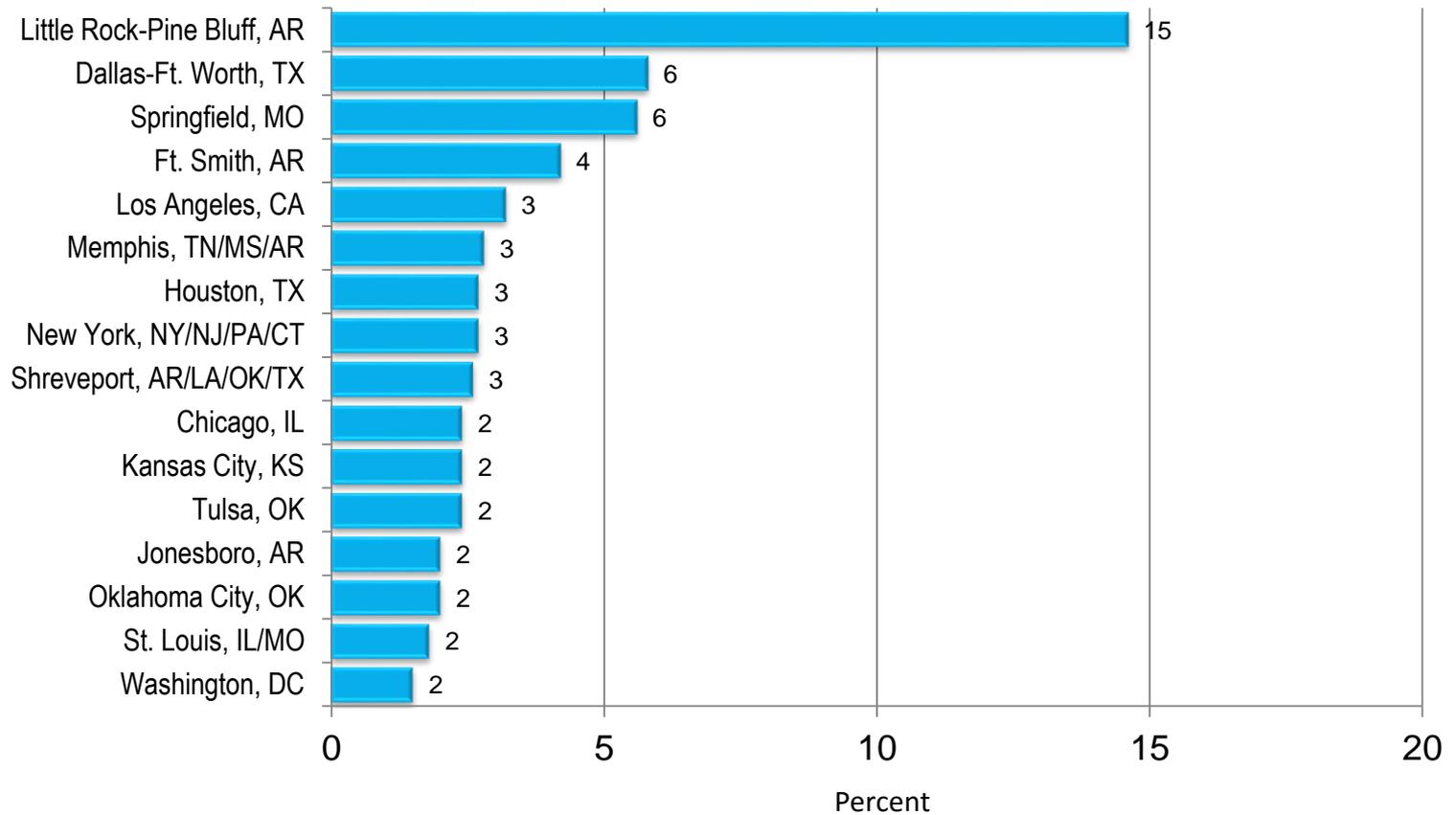
Base: Adult Overnight Leisure Trips to Arkansas



DMA Origin Of Trip



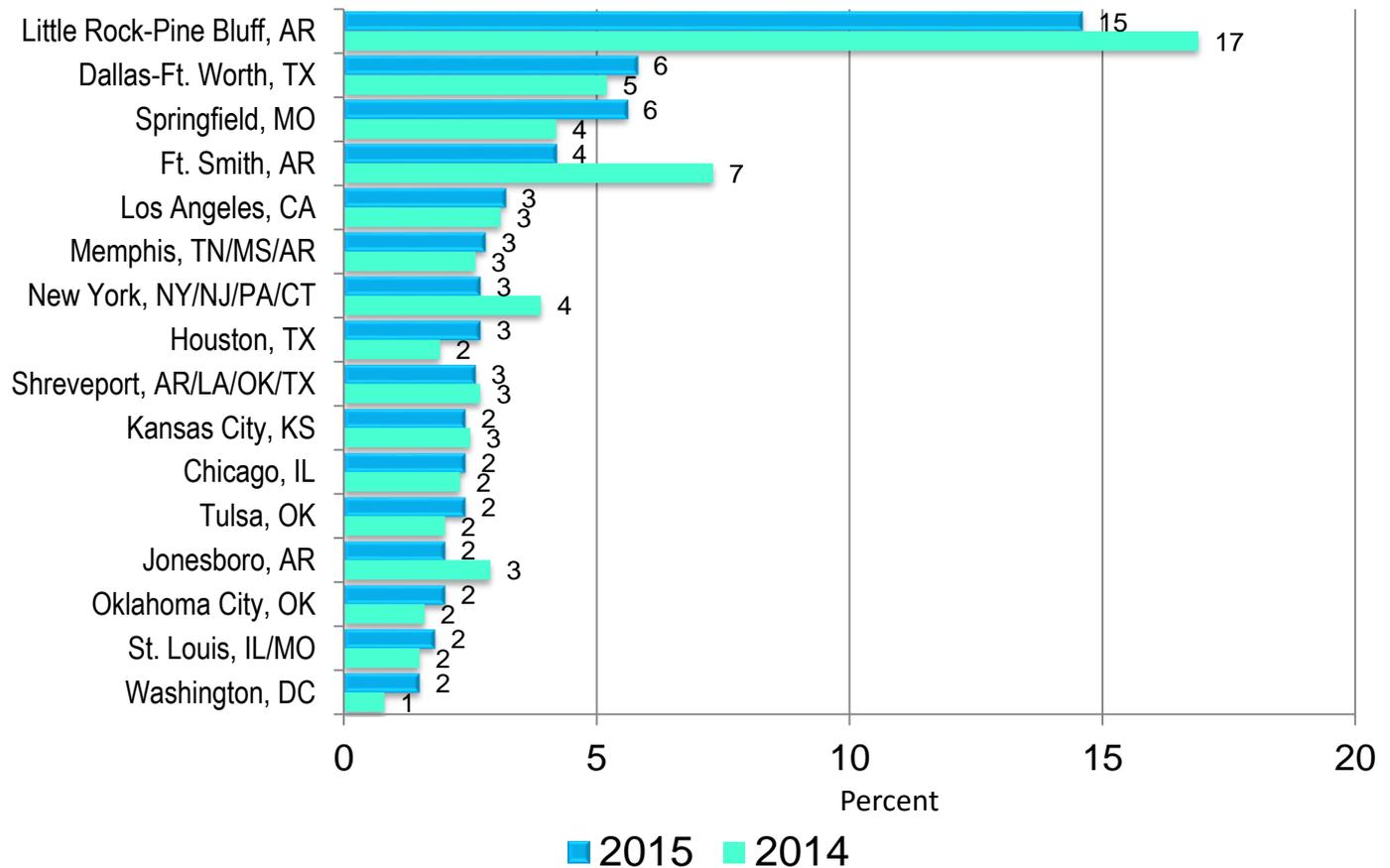
Base: Adult Overnight Leisure Trips to Arkansas



DMA Origin Of Trip



Base: Adult Overnight Leisure Trips to Arkansas



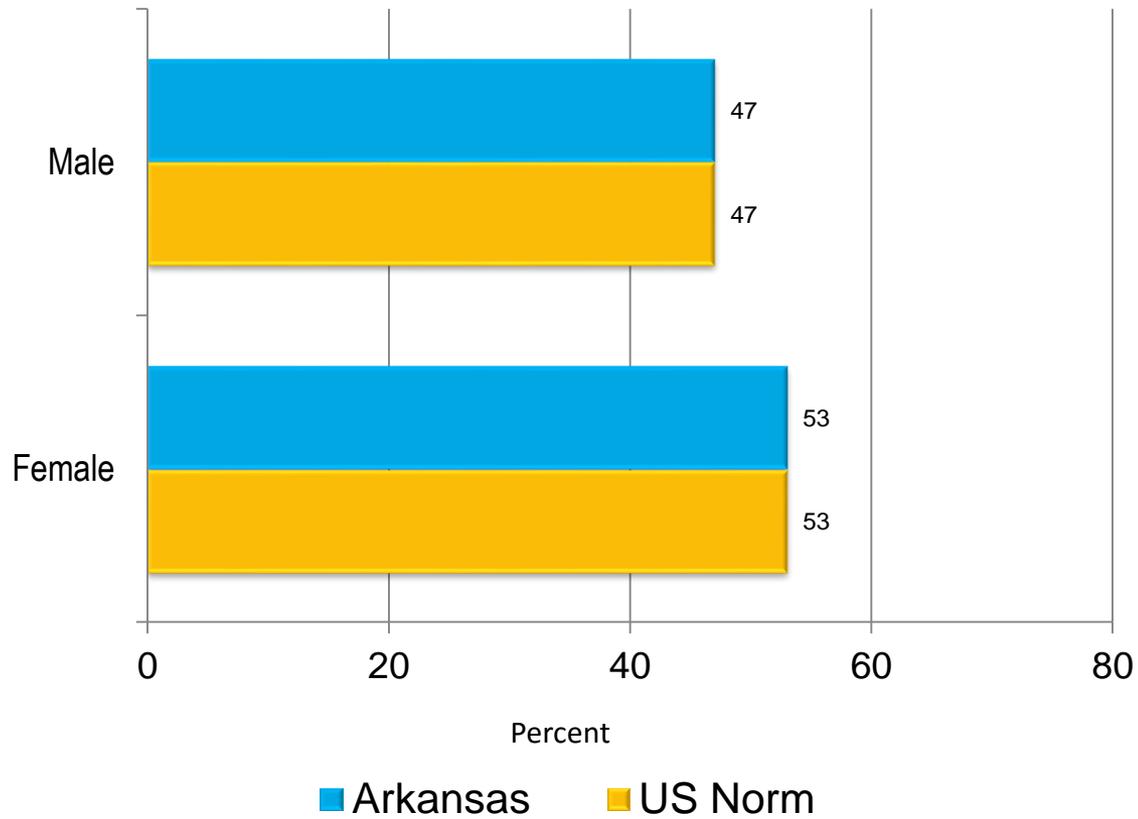


Overnight Leisure Trip Demographics

Gender



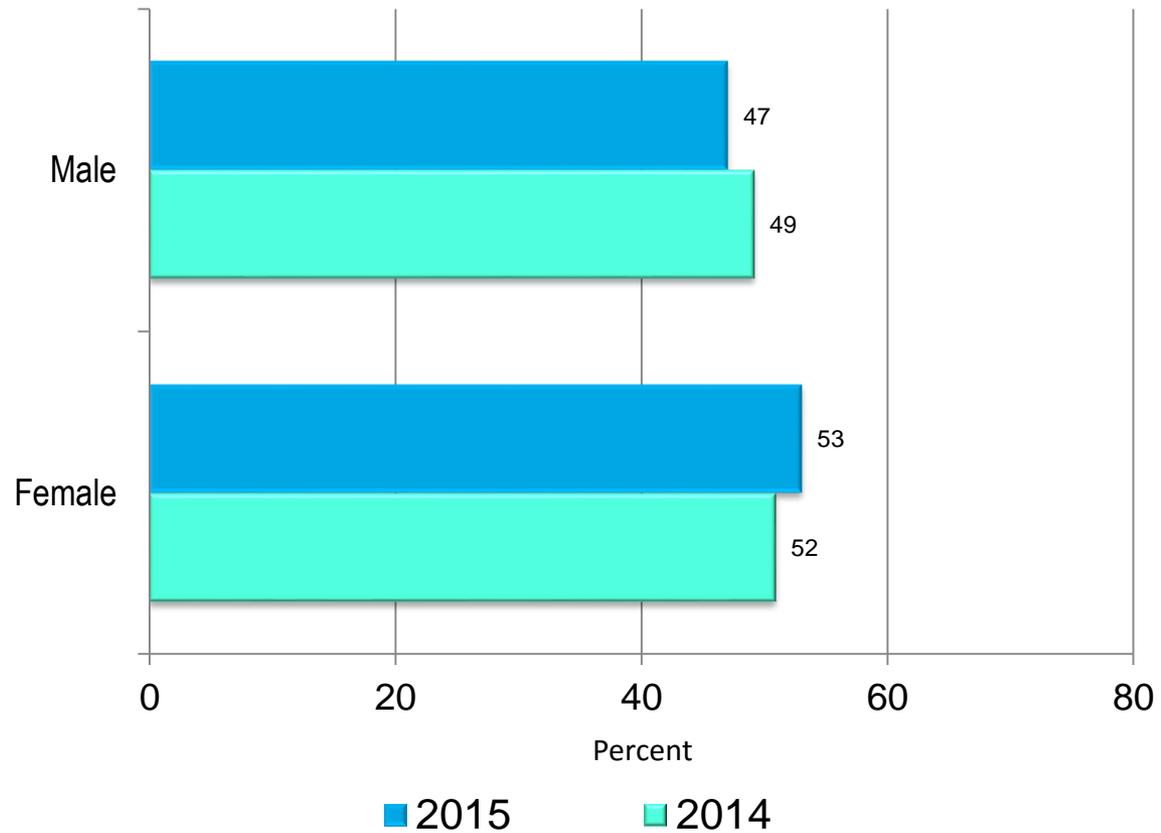
Base: Adult Overnight Leisure Trips



Gender



Base: Adult Overnight Leisure Trips to Arkansas



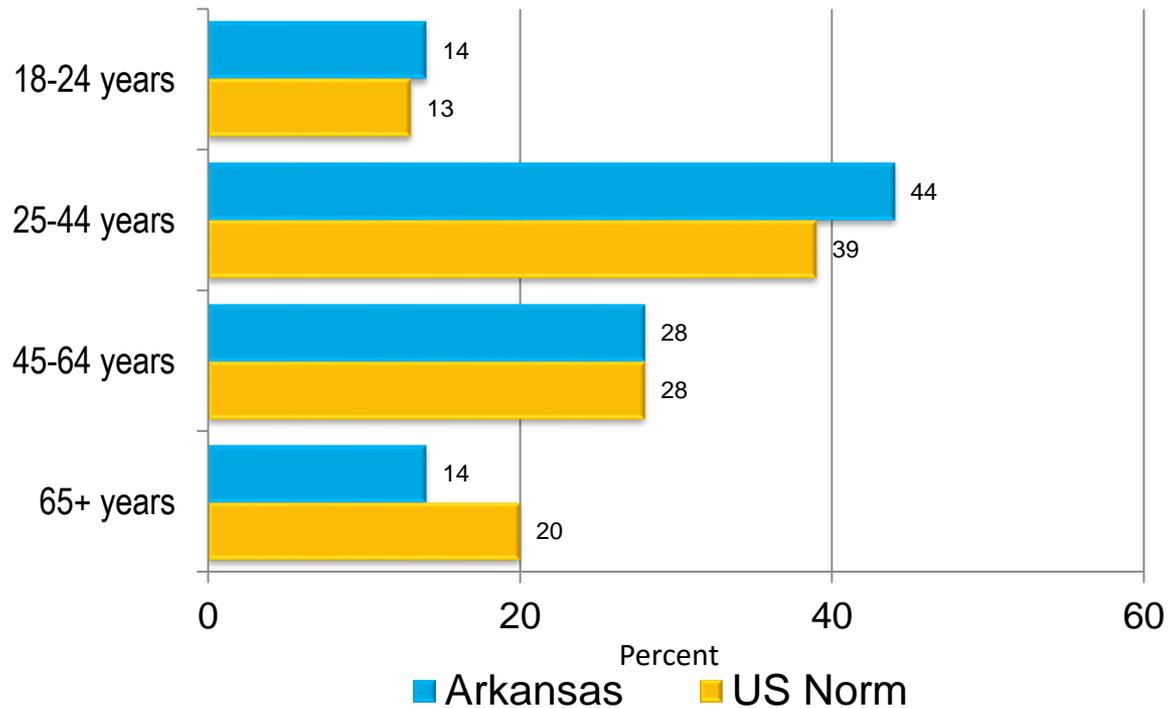
Age



Base: Adult Overnight Leisure Trips

**Average Age
Arkansas
= 43.2**

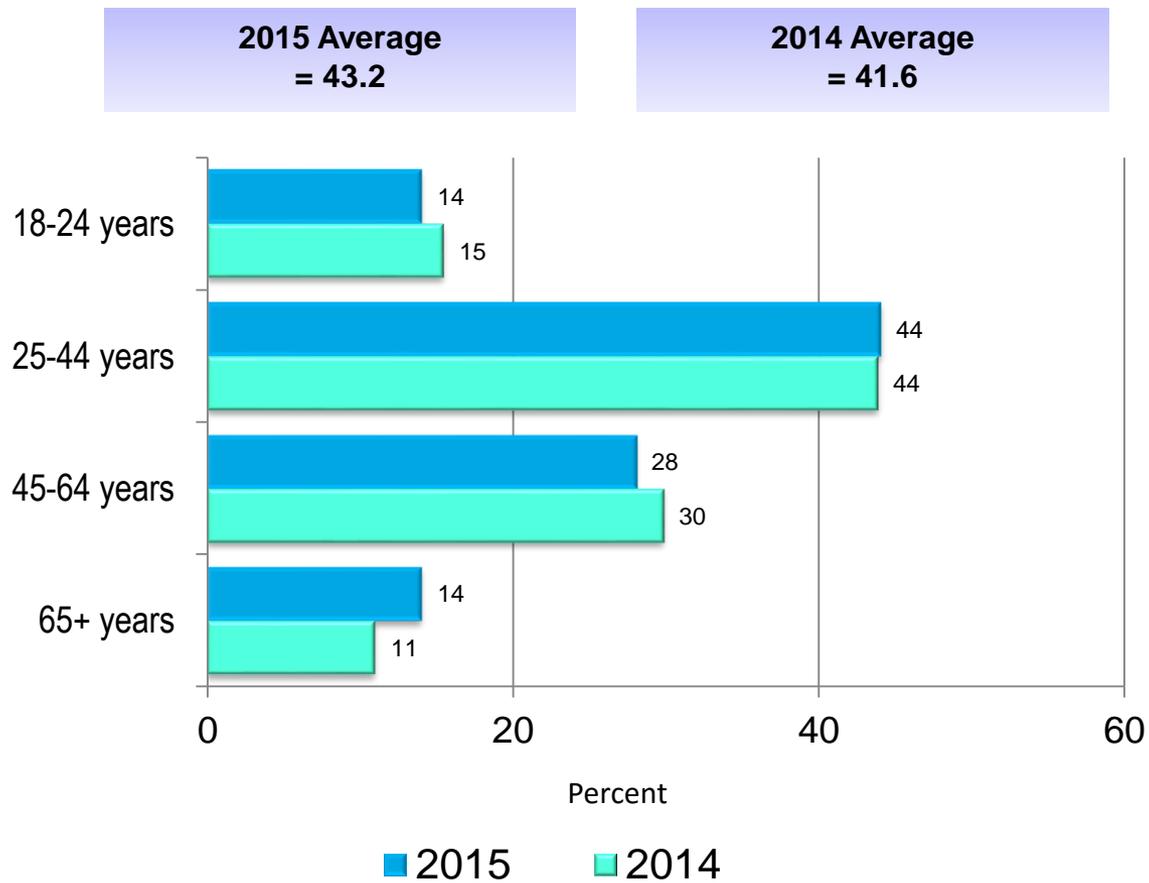
**Average Age
US Norm
= 45.5**



Age



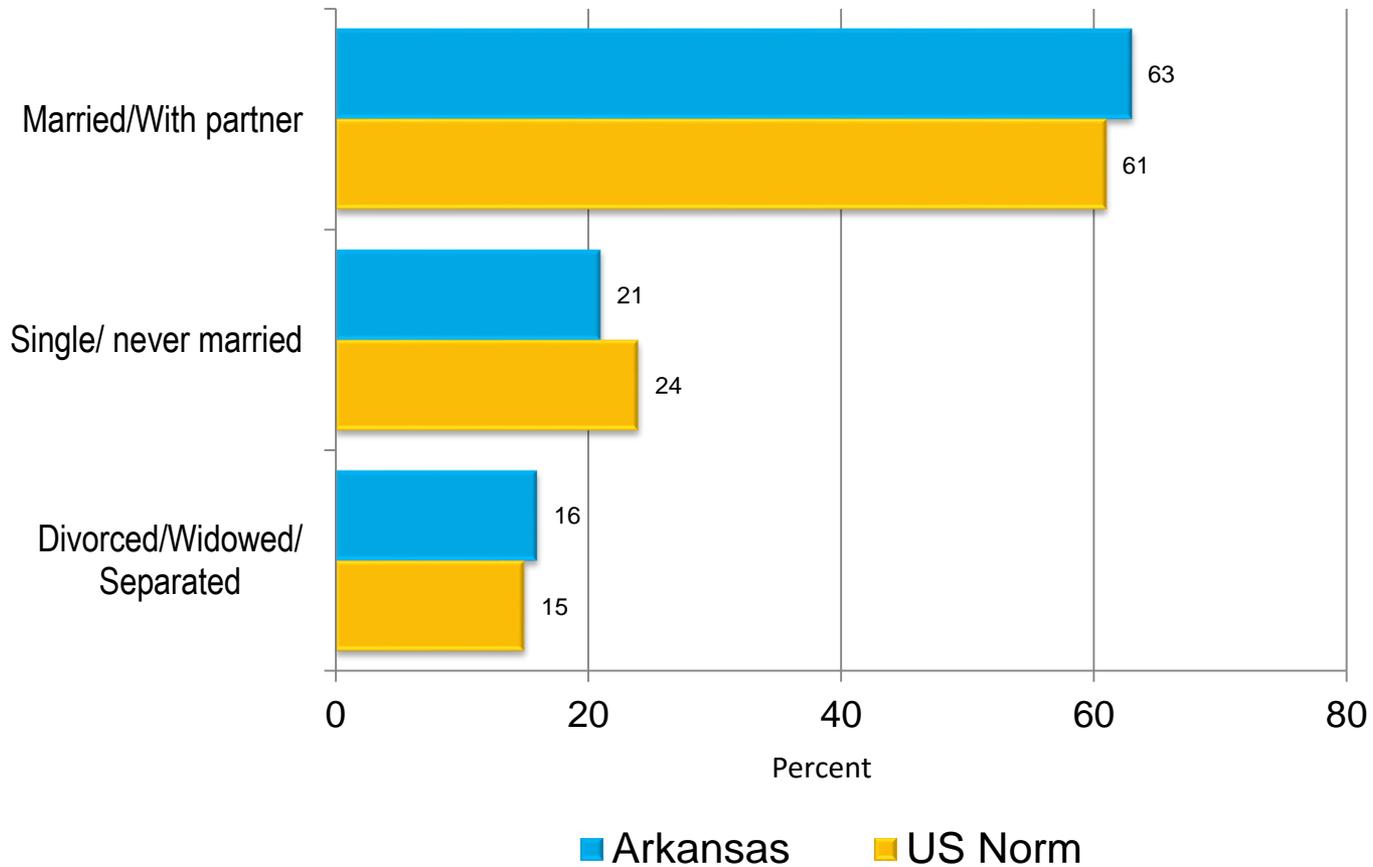
Base: Adult Overnight Leisure Trips to Arkansas



Marital Status



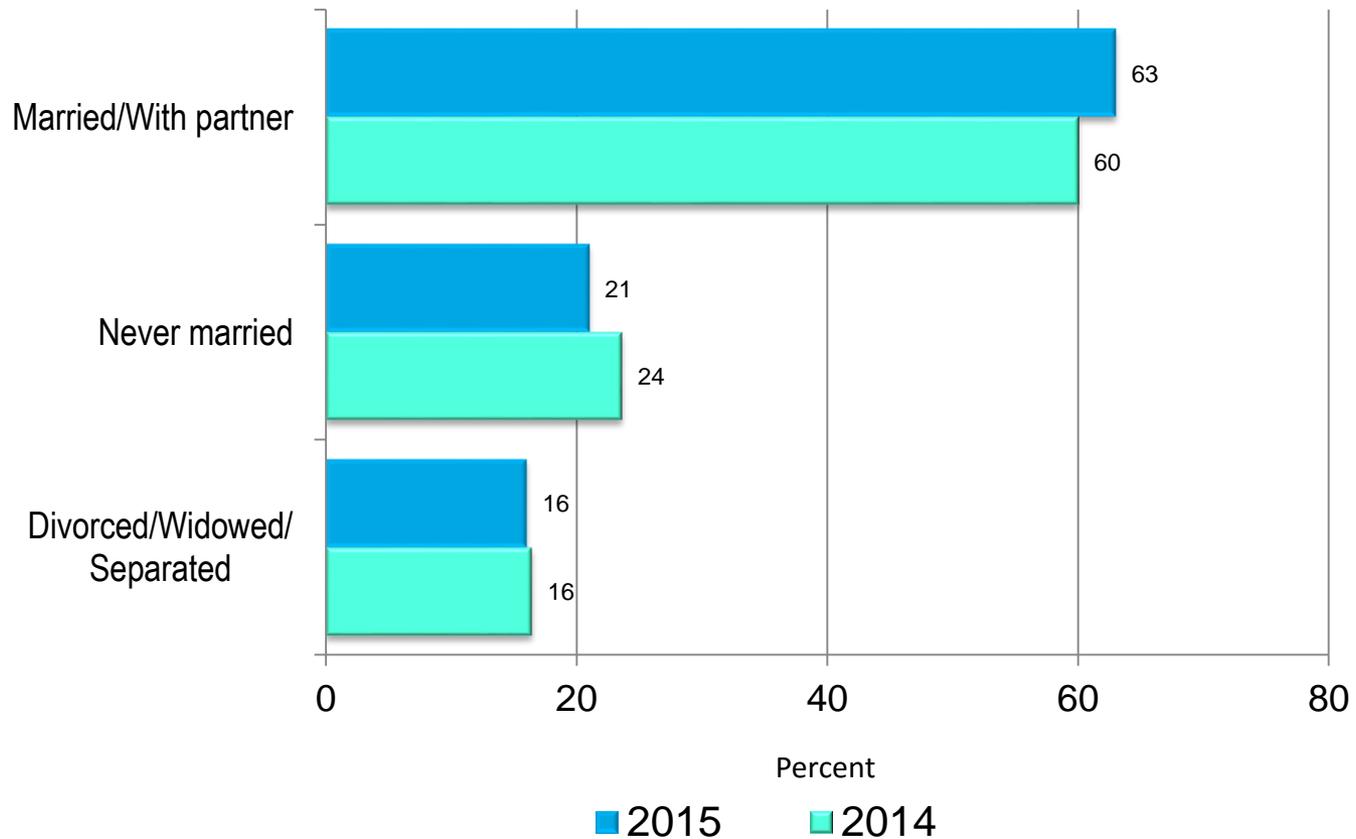
Base: Adult Overnight Leisure Trips



Marital Status



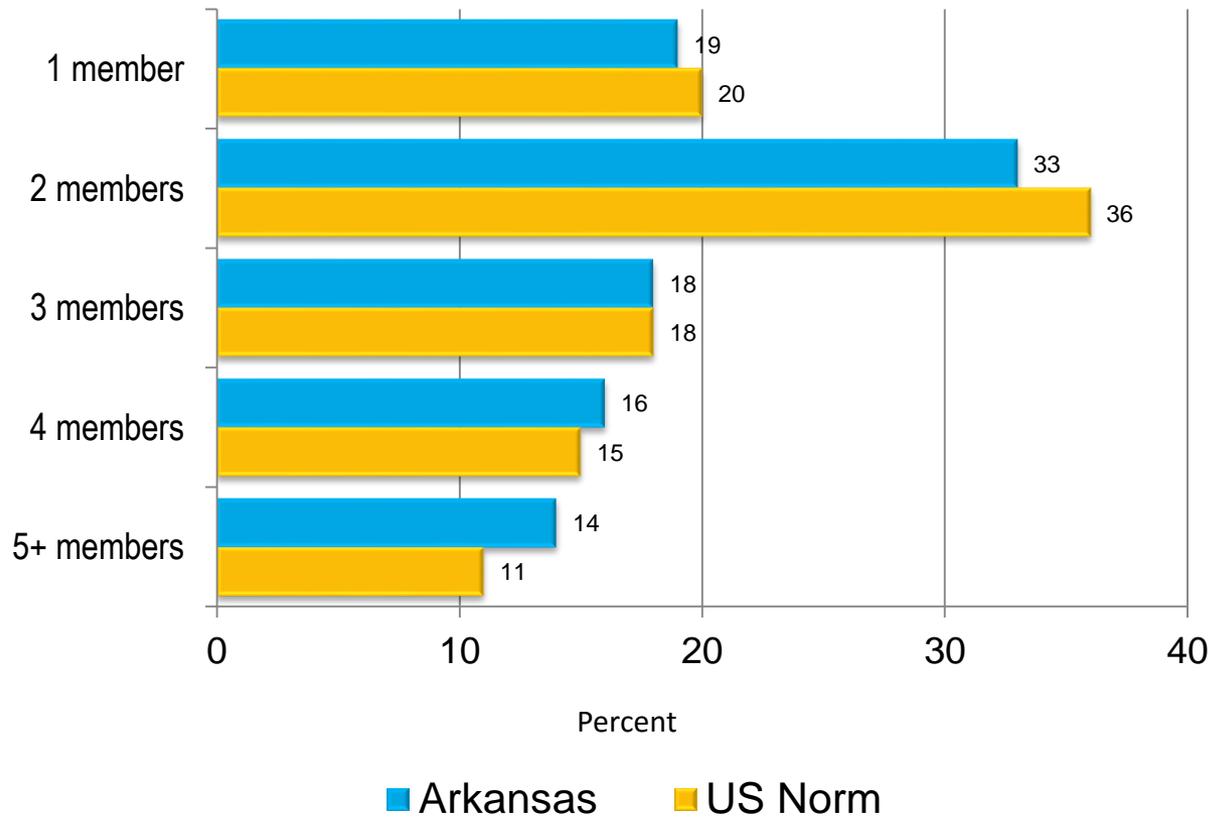
Base: Adult Overnight Leisure Trips to Arkansas



Household Size



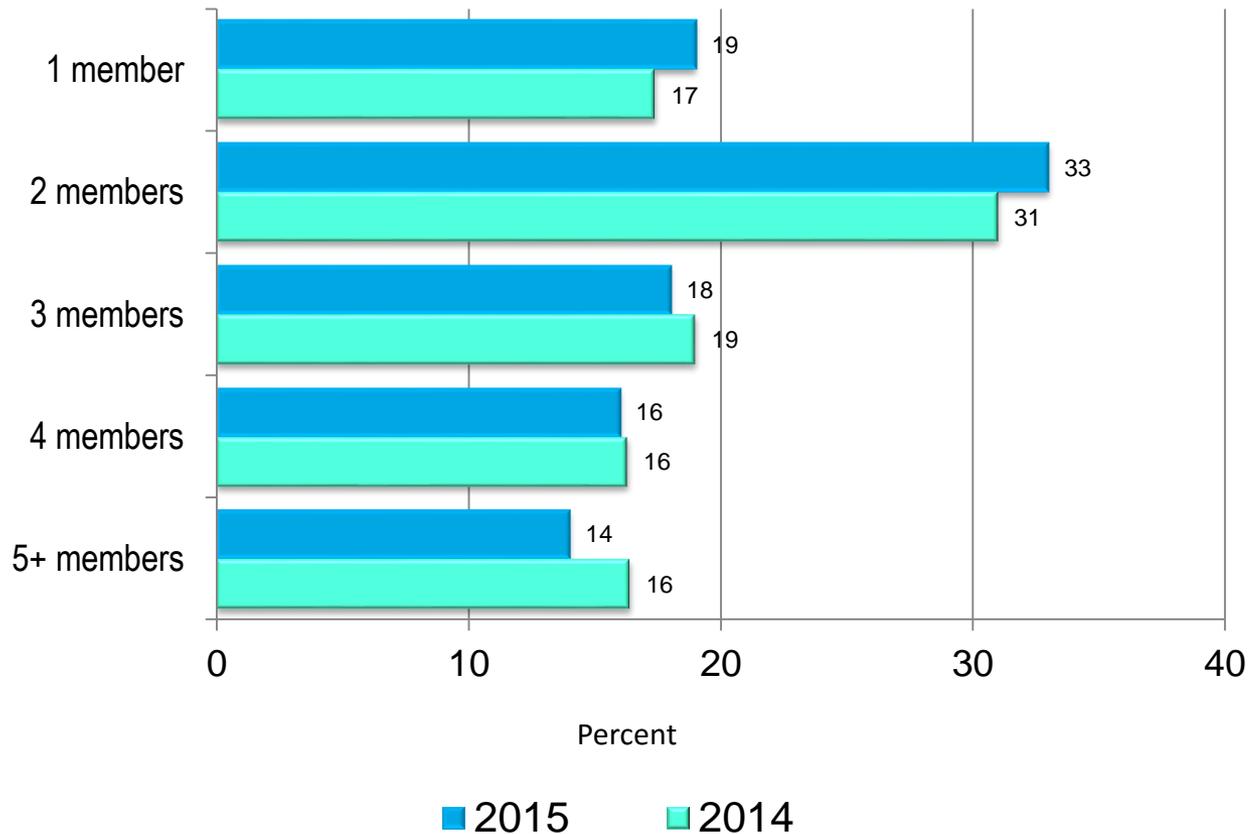
Base: Adult Overnight Leisure Trips



Household Size



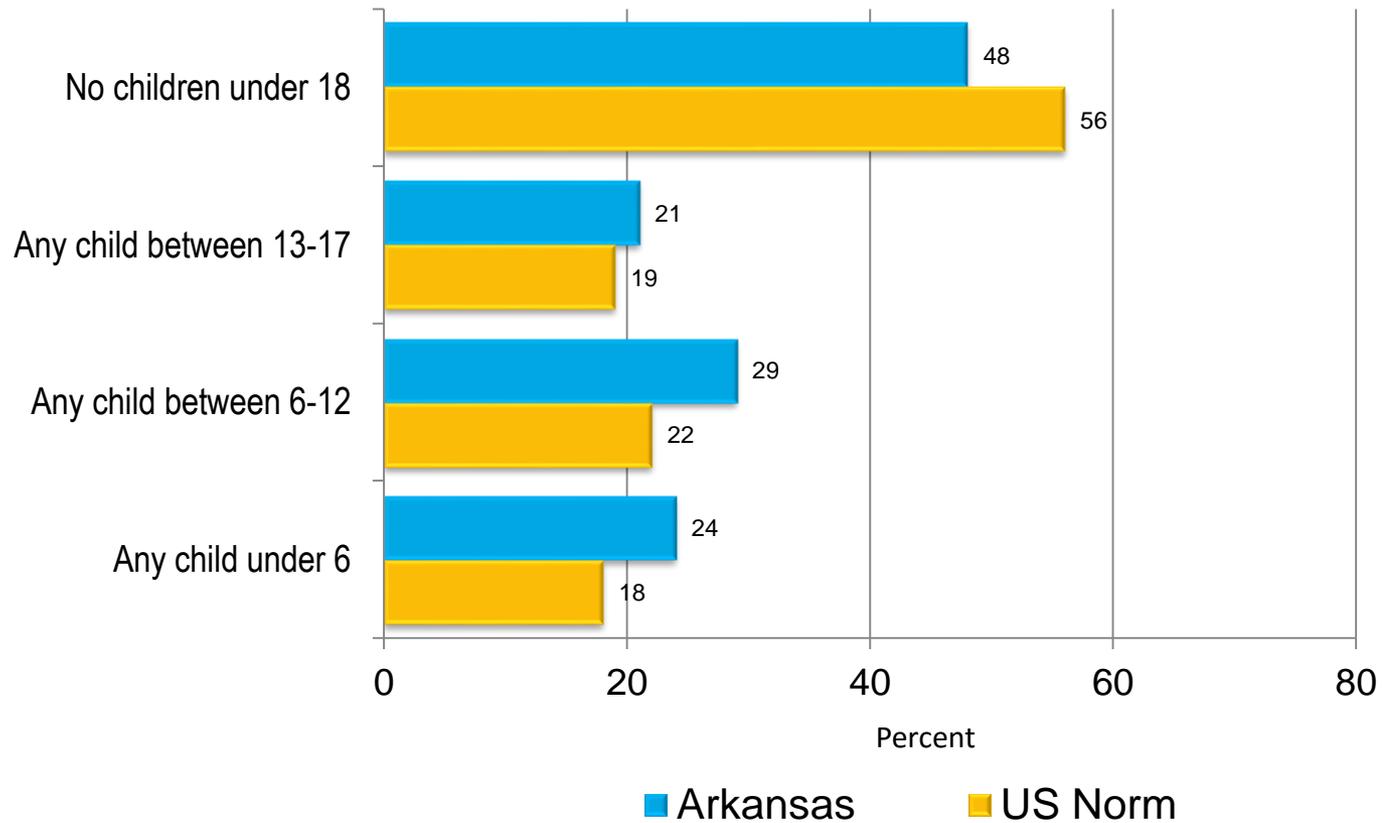
Base: Adult Overnight Leisure Trips to Arkansas



Children in Household



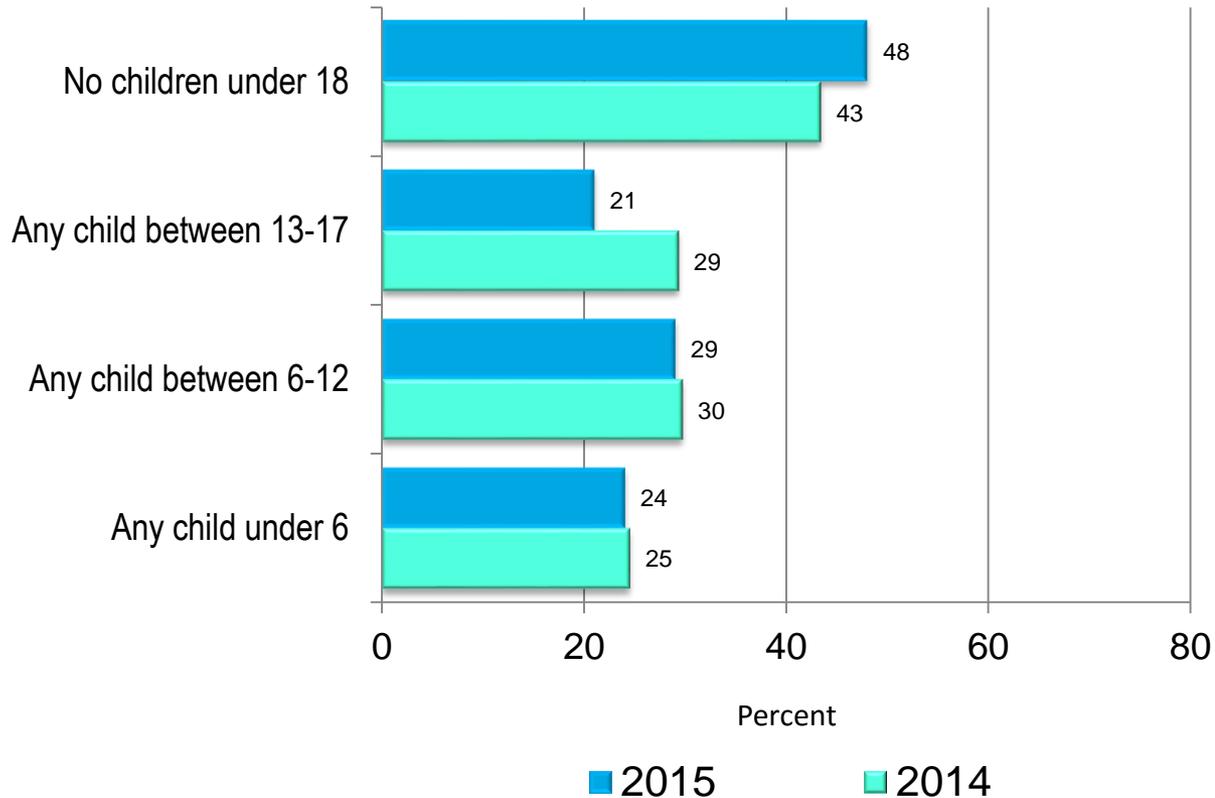
Base: Adult Overnight Leisure Trips



Children in Household



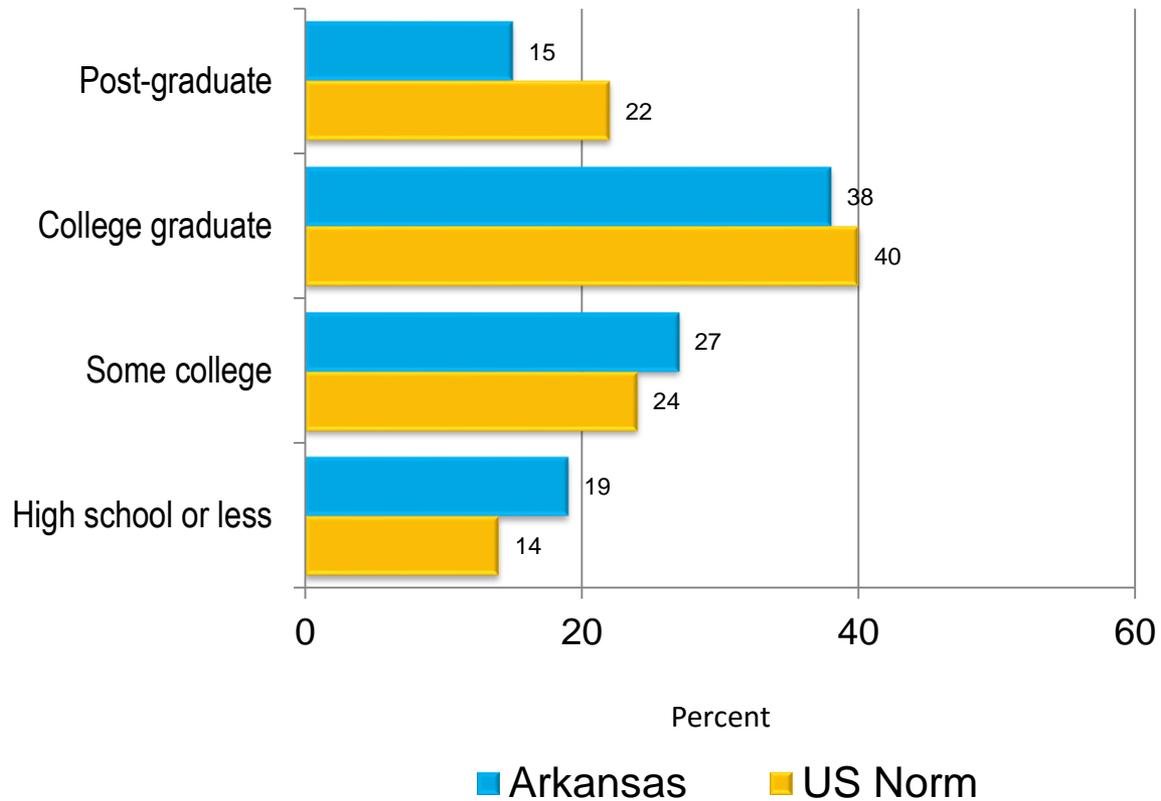
Base: Adult Overnight Leisure Trips to Arkansas



Education



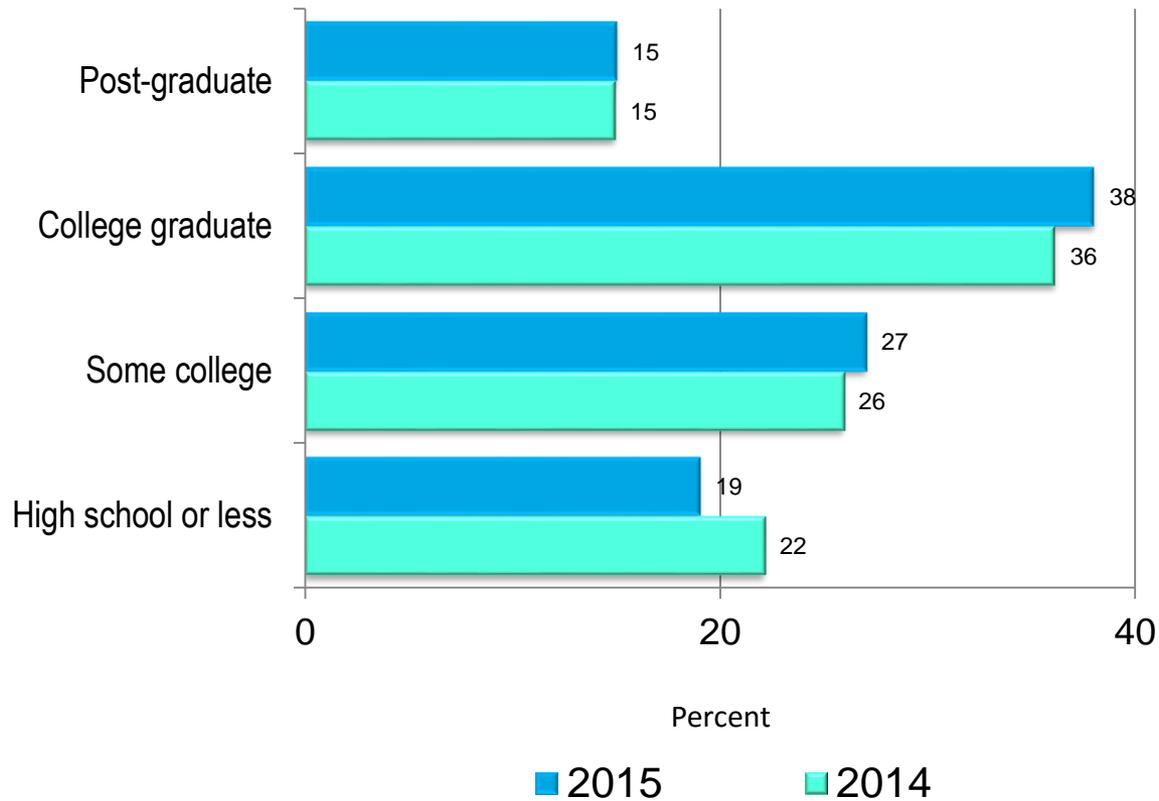
Base: Adult Overnight Leisure Trips



Education



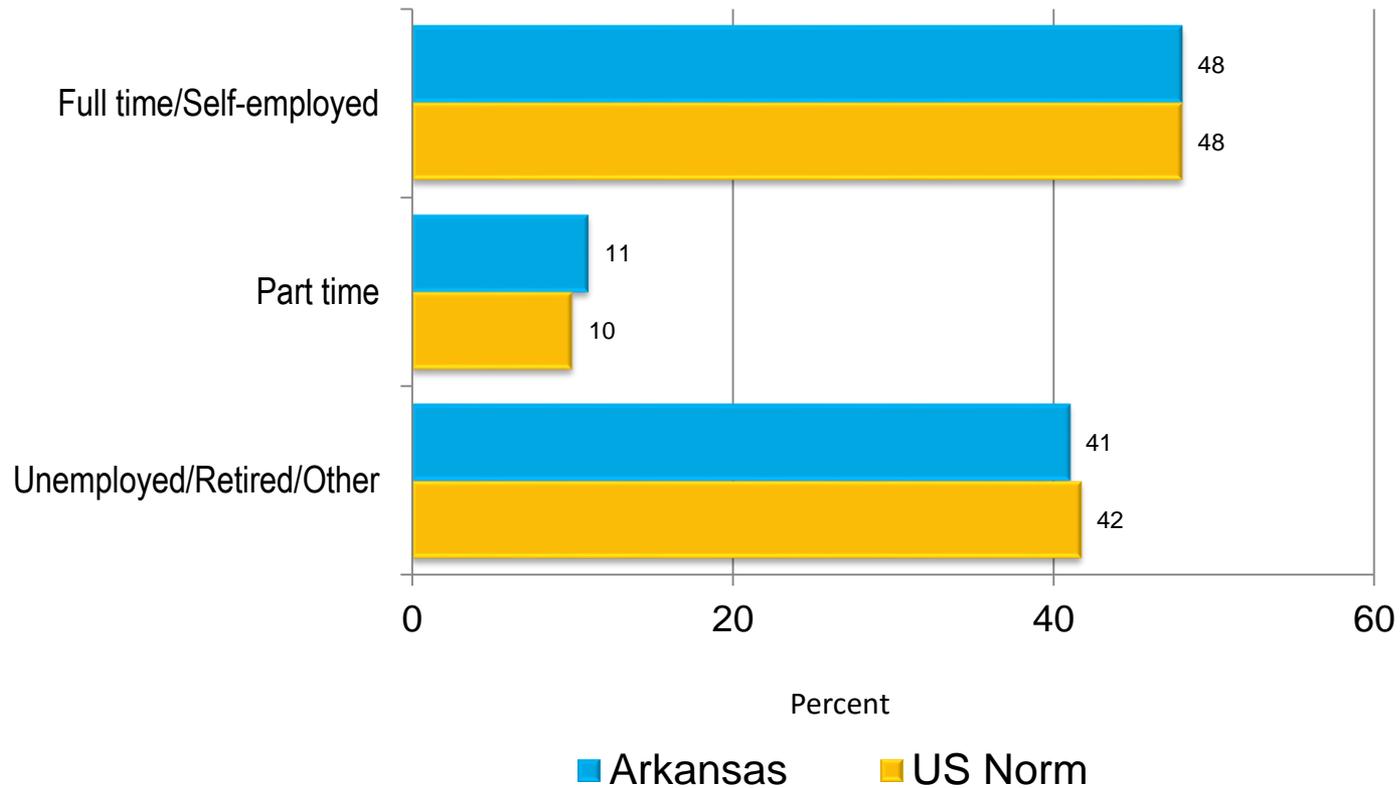
Base: Adult Overnight Leisure Trips to Arkansas



Employment



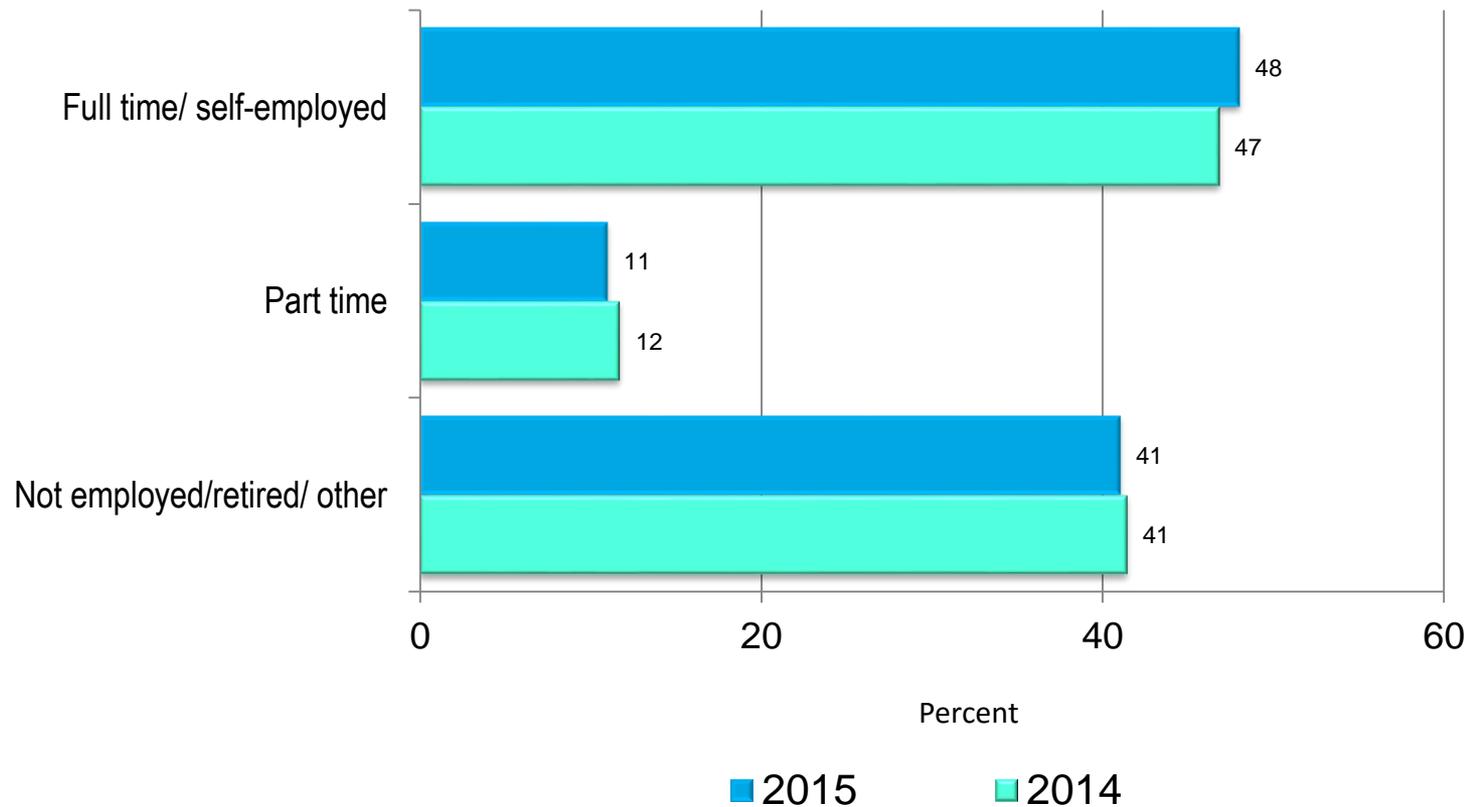
Base: Adult Overnight Leisure Trips



Employment



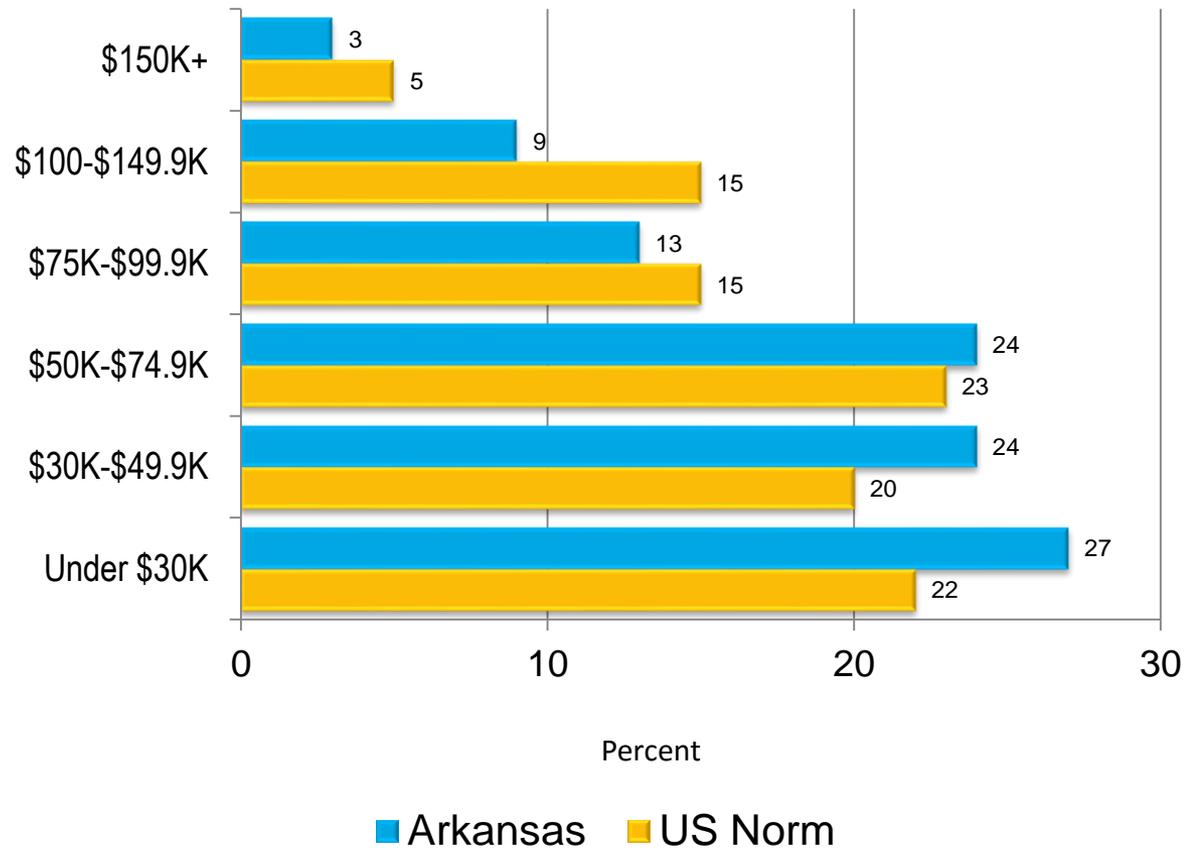
Base: Adult Overnight Leisure Trips to Arkansas



Household Income



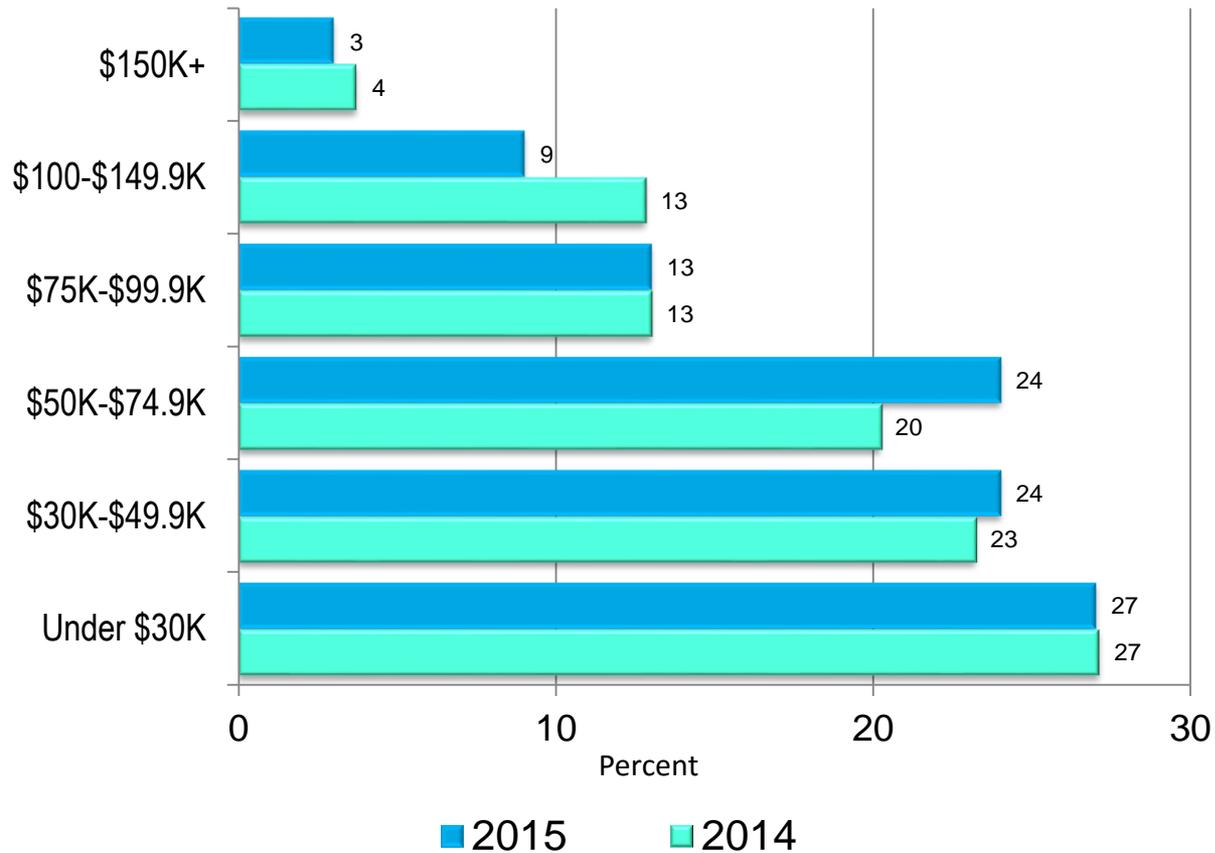
Base: Adult Overnight Leisure Trips



Household Income



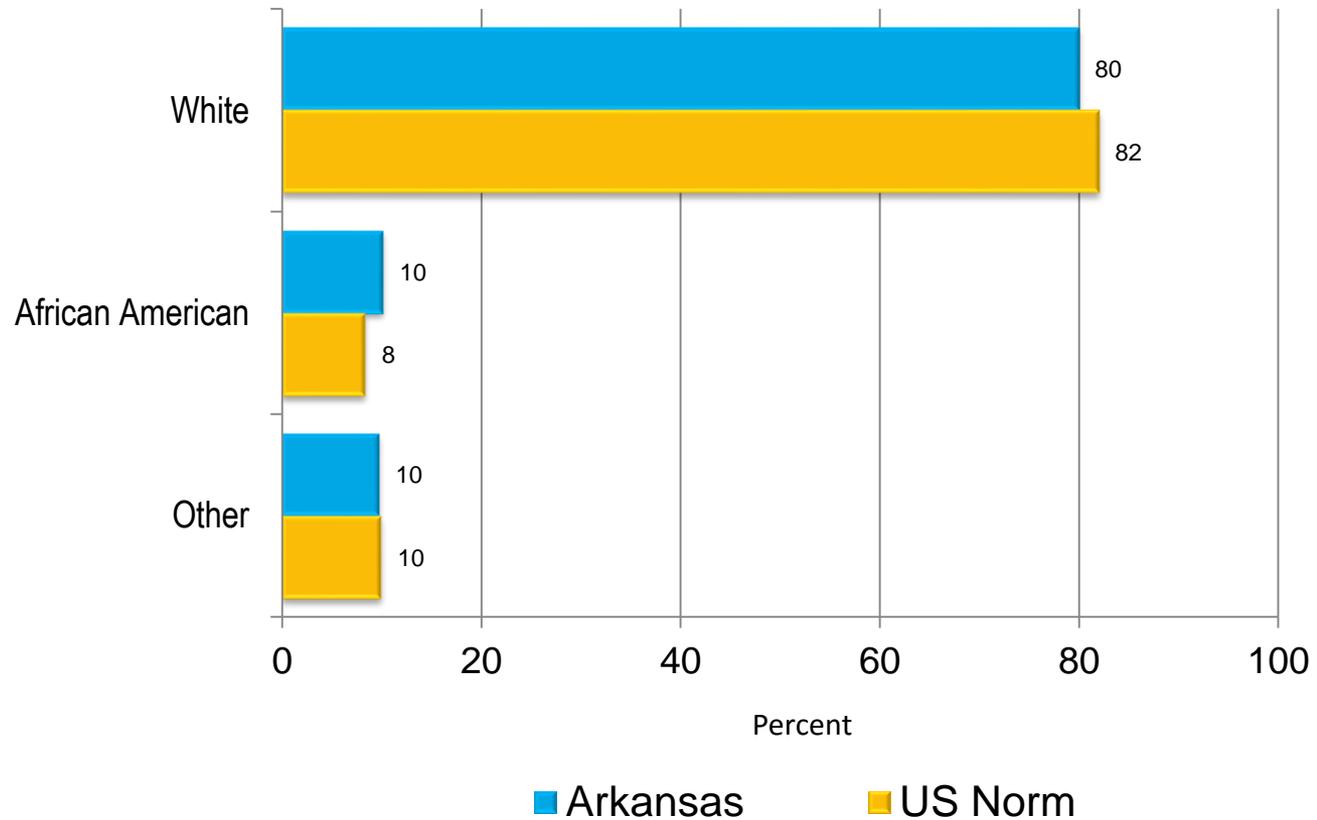
Base: Adult Overnight Leisure Trips to Arkansas



Race



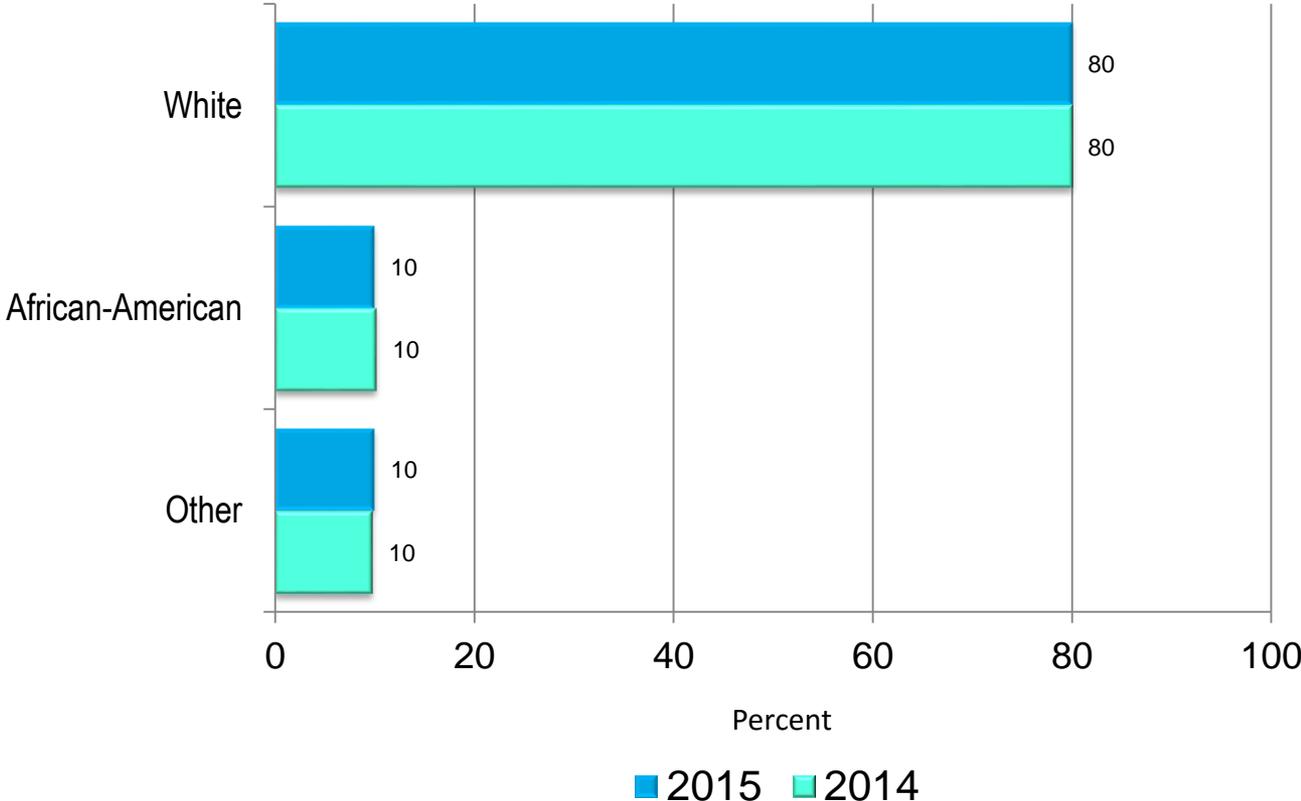
Base: Adult Overnight Leisure Trips



Race



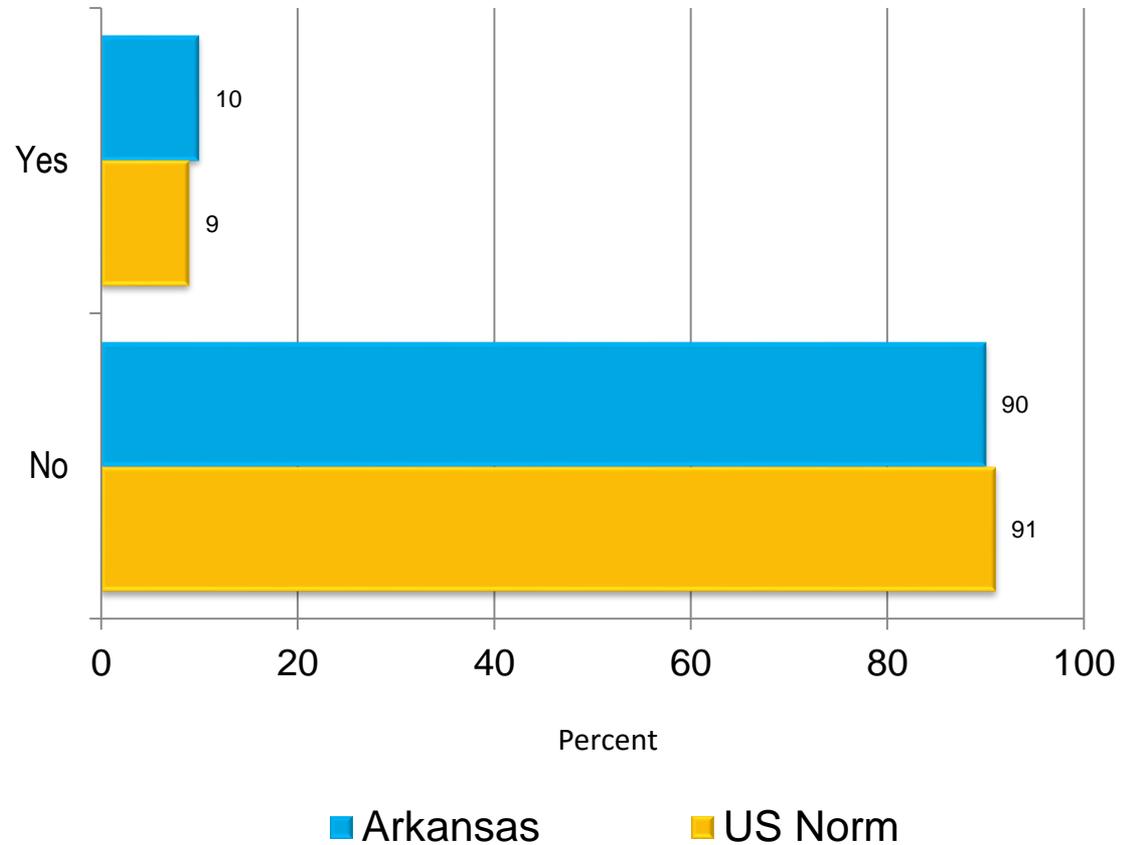
Base: Adult Overnight Leisure Trips to Arkansas



Hispanic Background



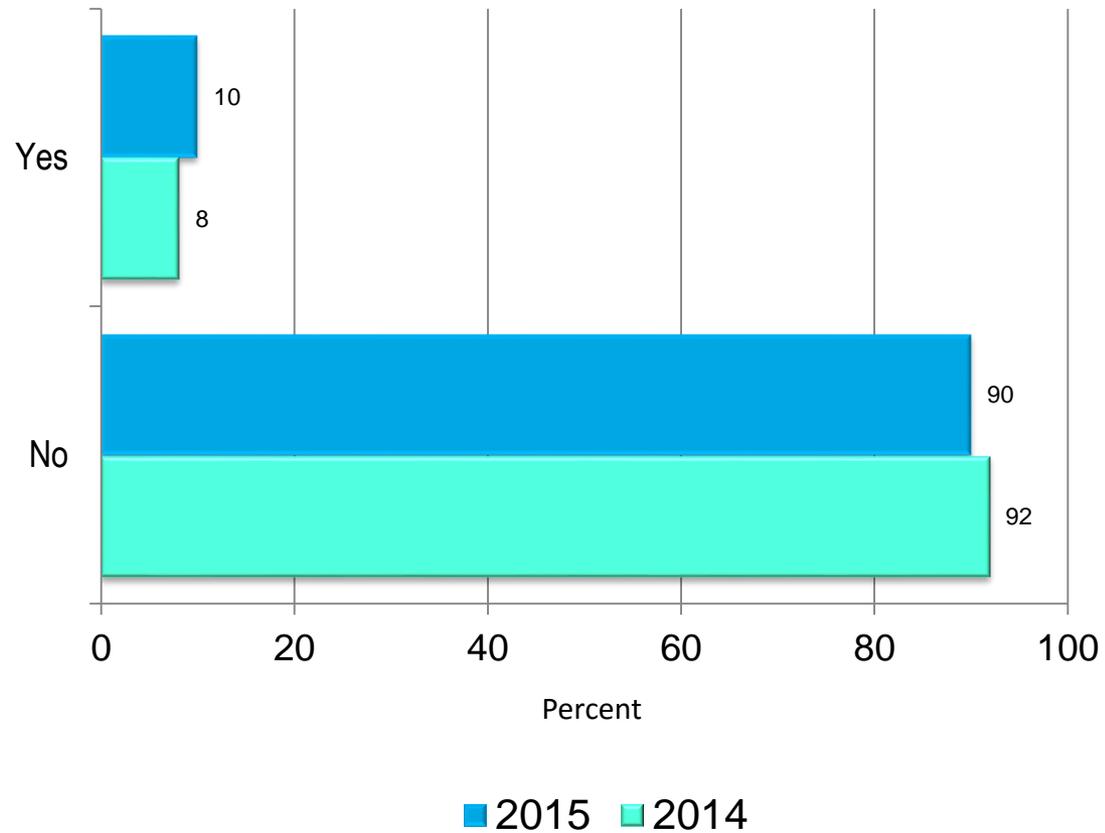
Base: Adult Overnight Leisure Trips



Hispanic Background



Base: Adult Overnight Leisure Trips to Arkansas



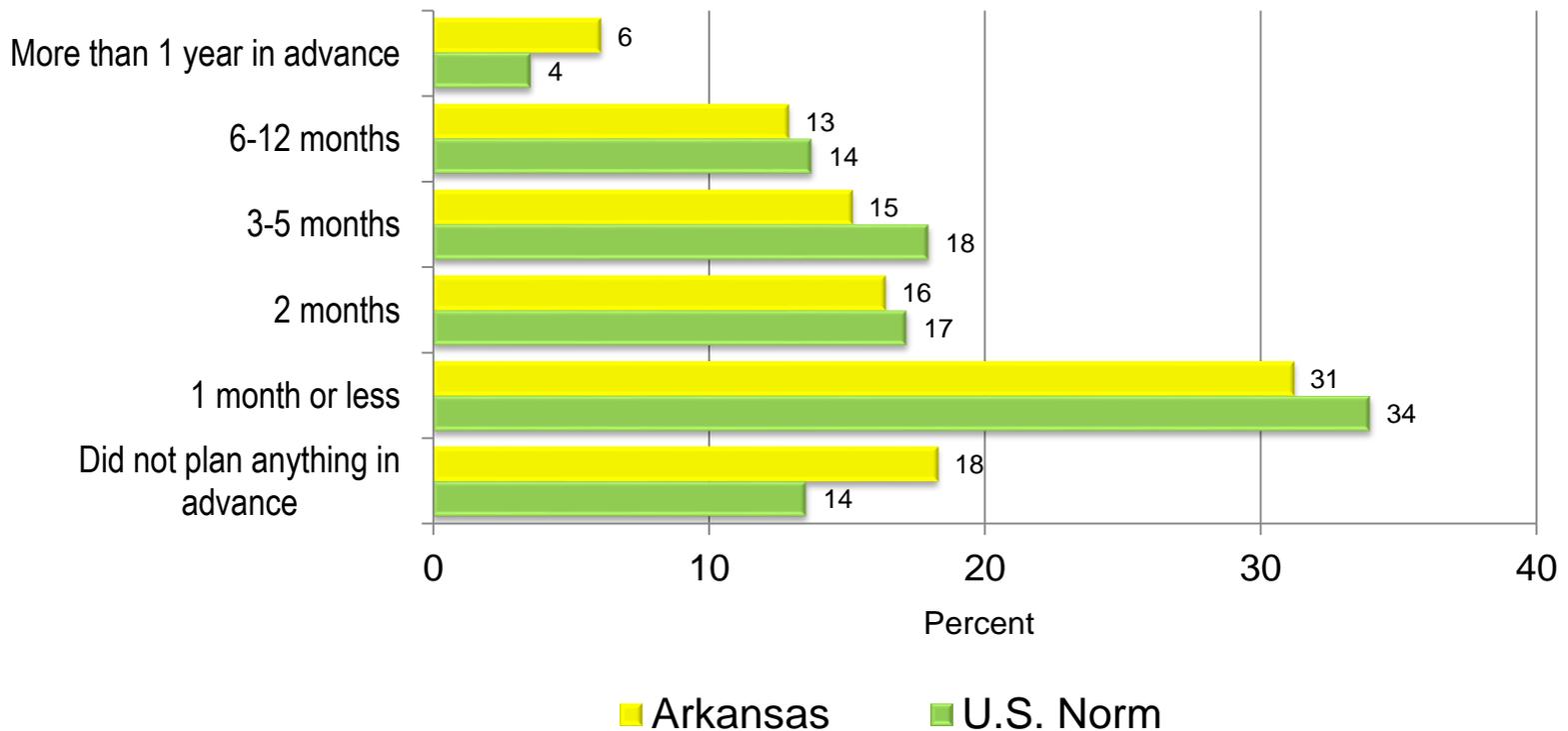


Overnight Leisure Trips Planning & Booking

Length of Trip Planning



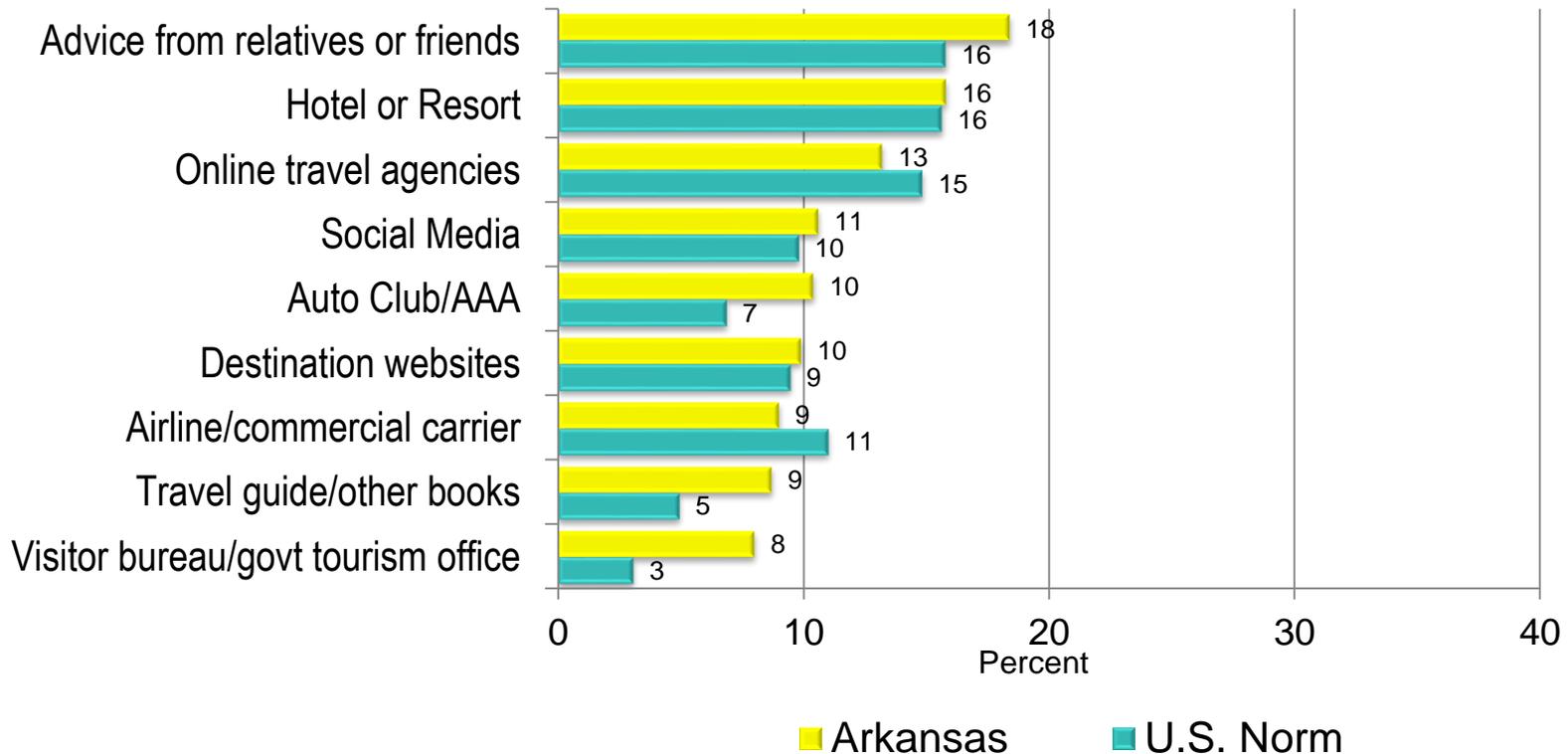
Base: Adult Overnight Leisure Trips



Trip Planning Information Sources



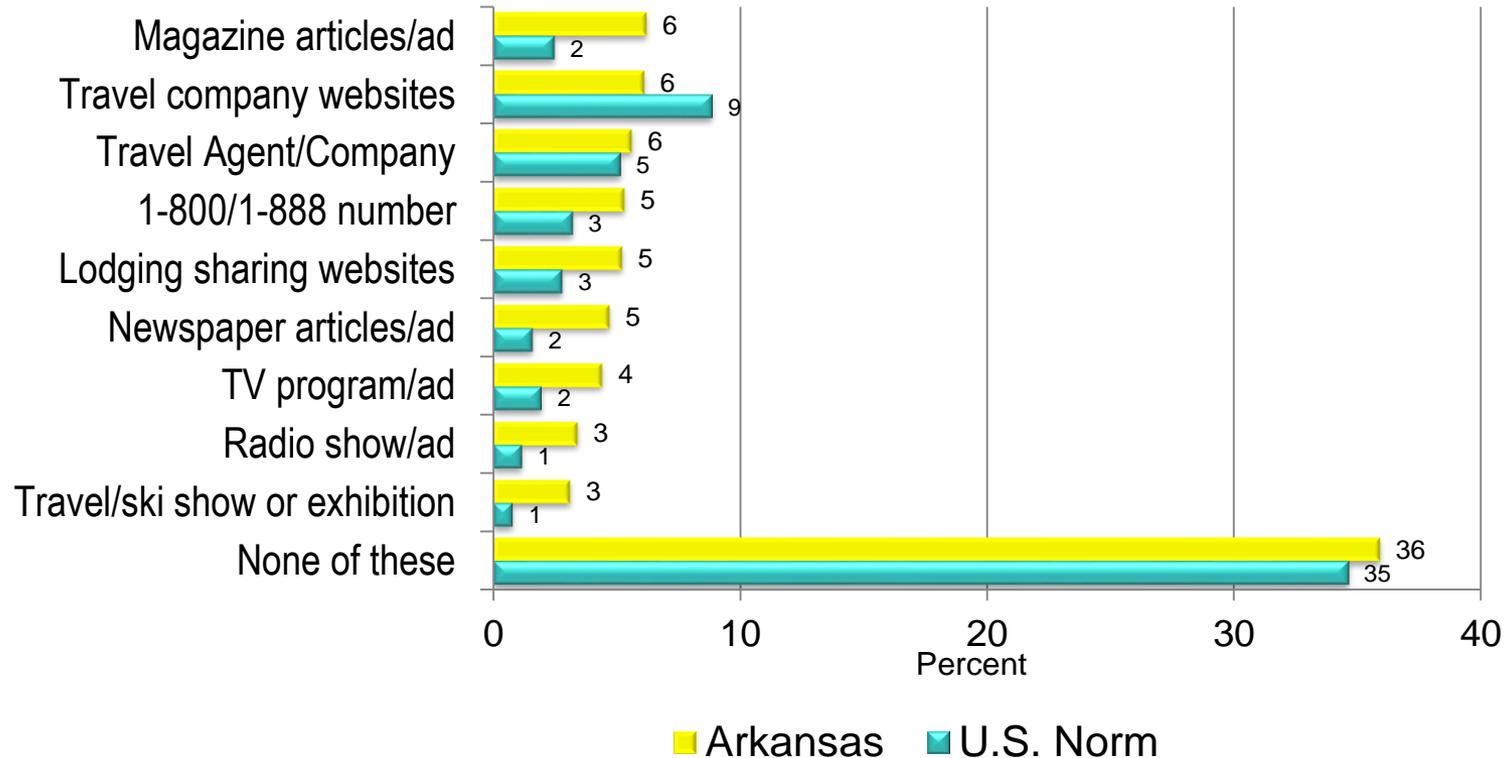
Base: Adult Overnight Leisure Trips



Trip Planning Information Sources



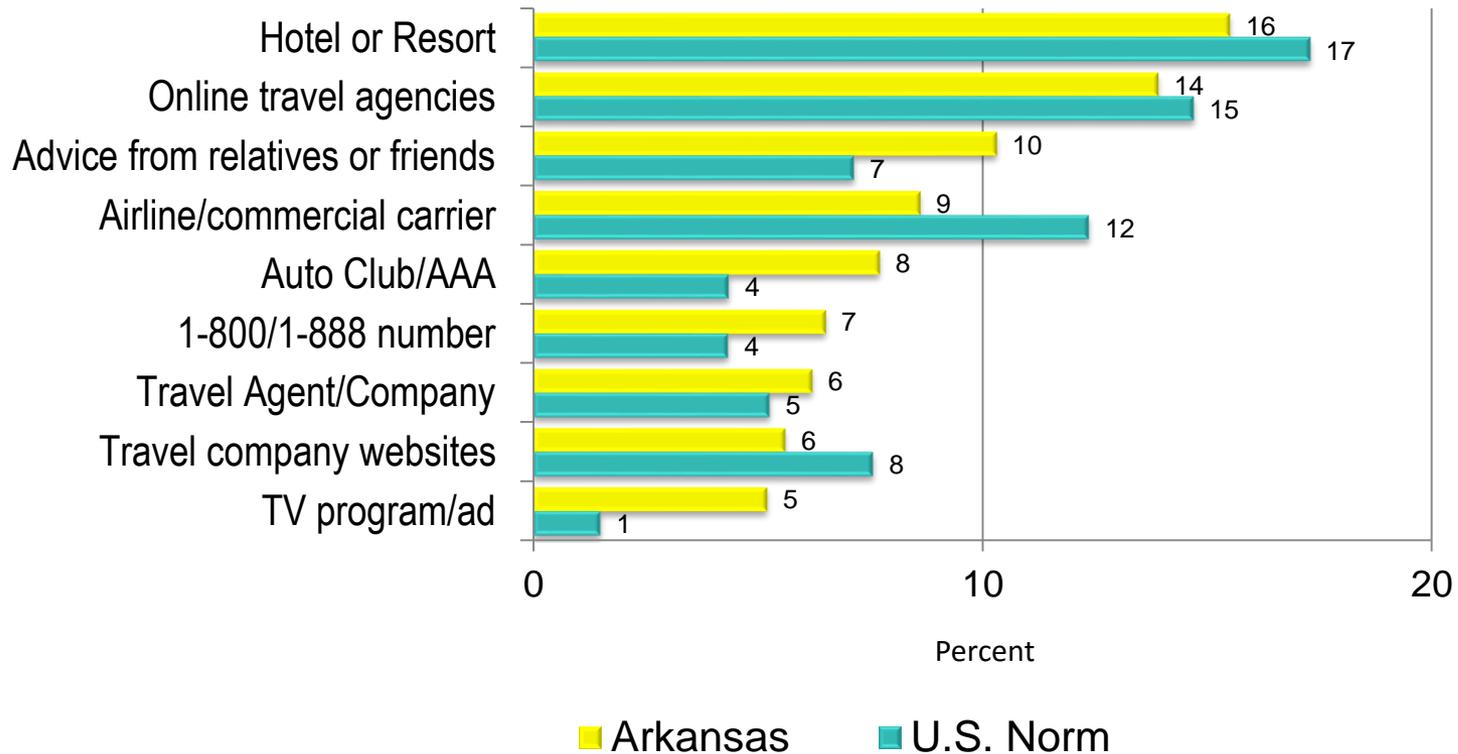
Base: Adult Overnight Leisure Trips



Method of Booking



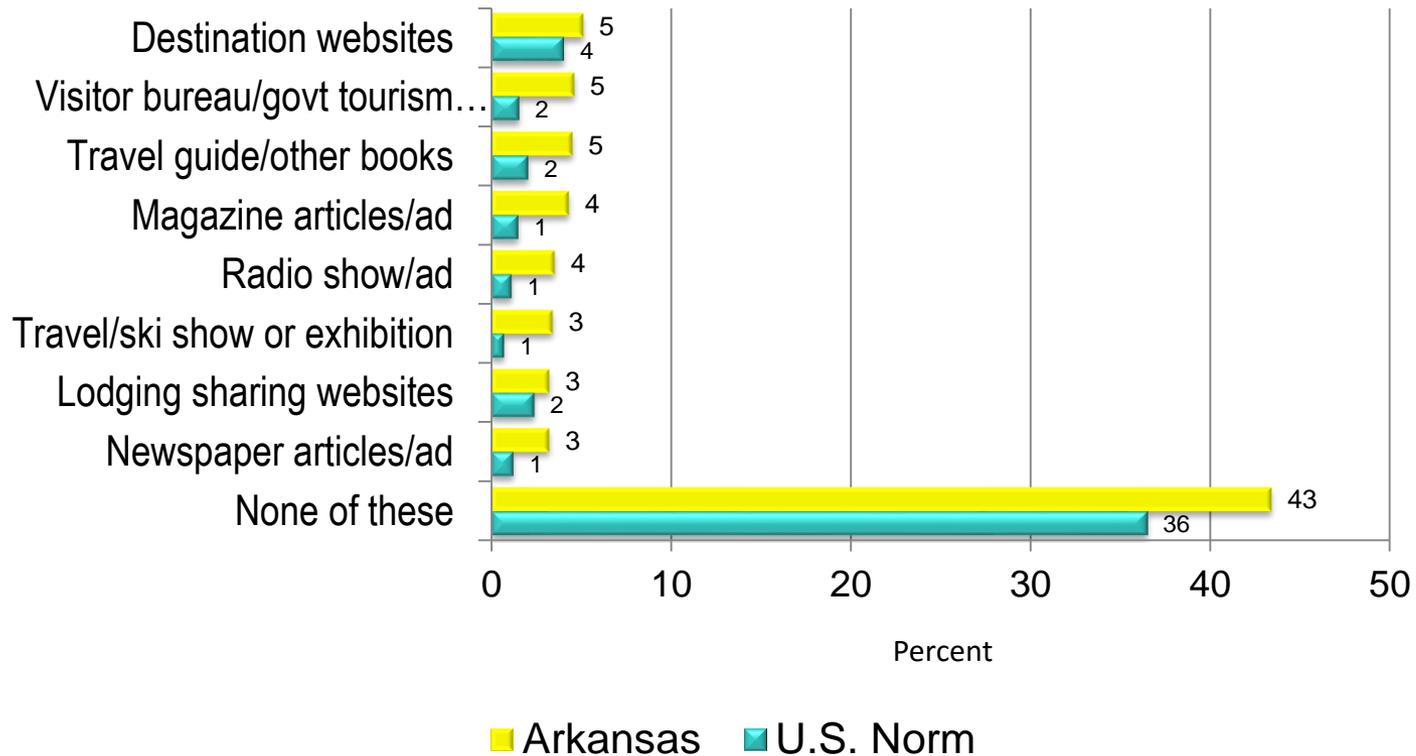
Base: Adult Overnight Leisure Trips



Method of Booking (Cont'd)



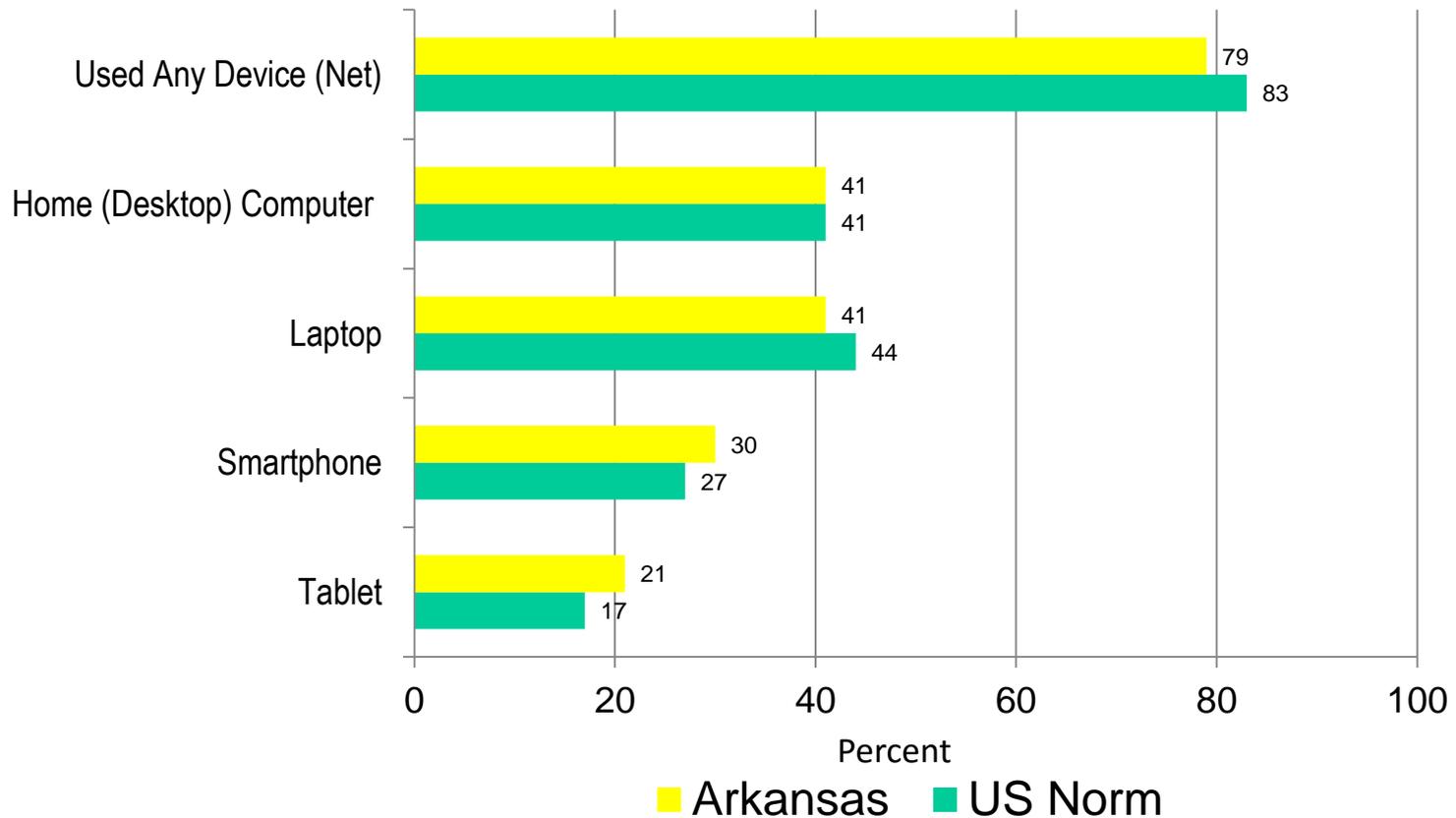
Base: Adult Overnight Leisure Trips



Use of Devices for Trip Planning



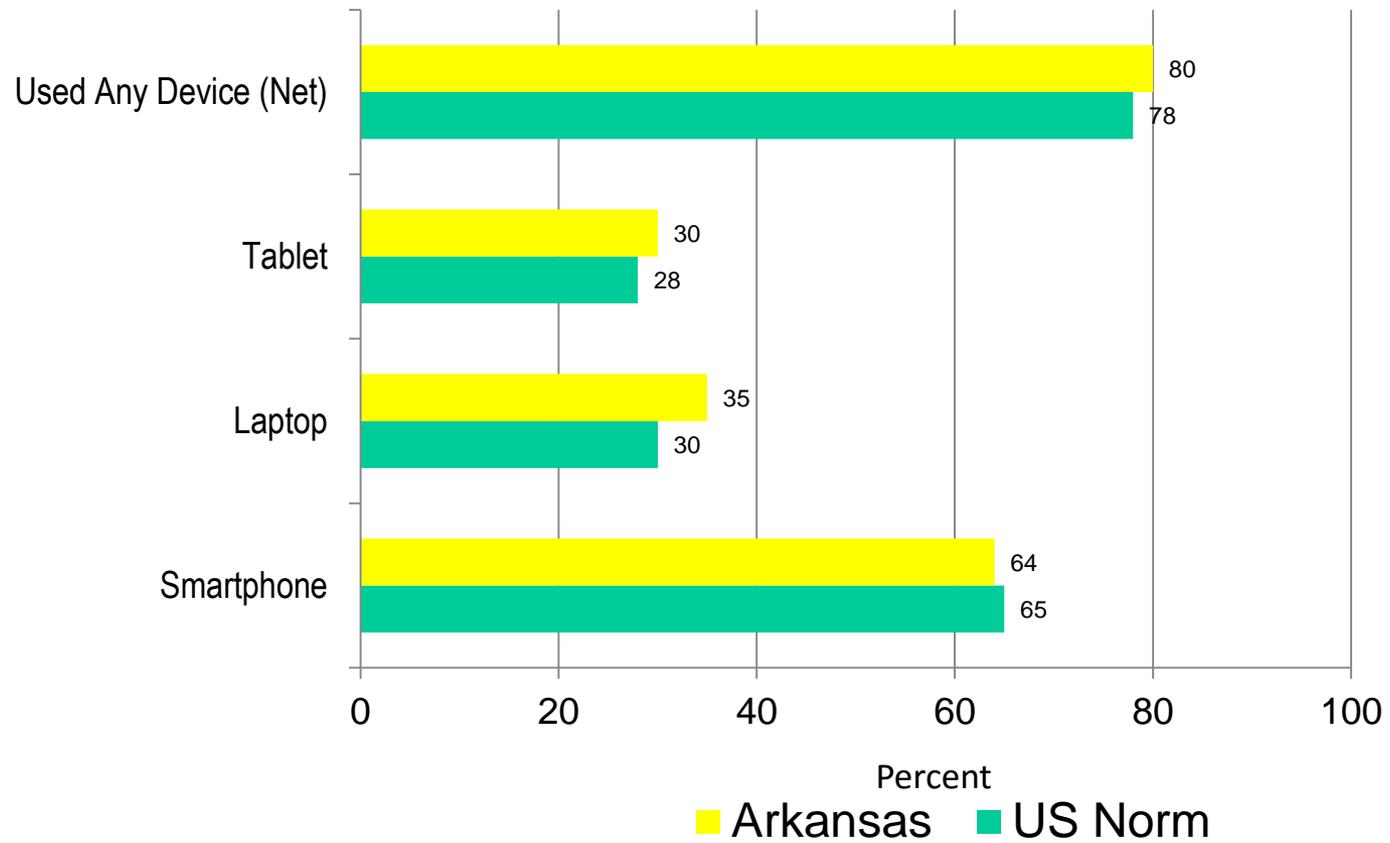
Base: Adult Overnight Leisure Trips



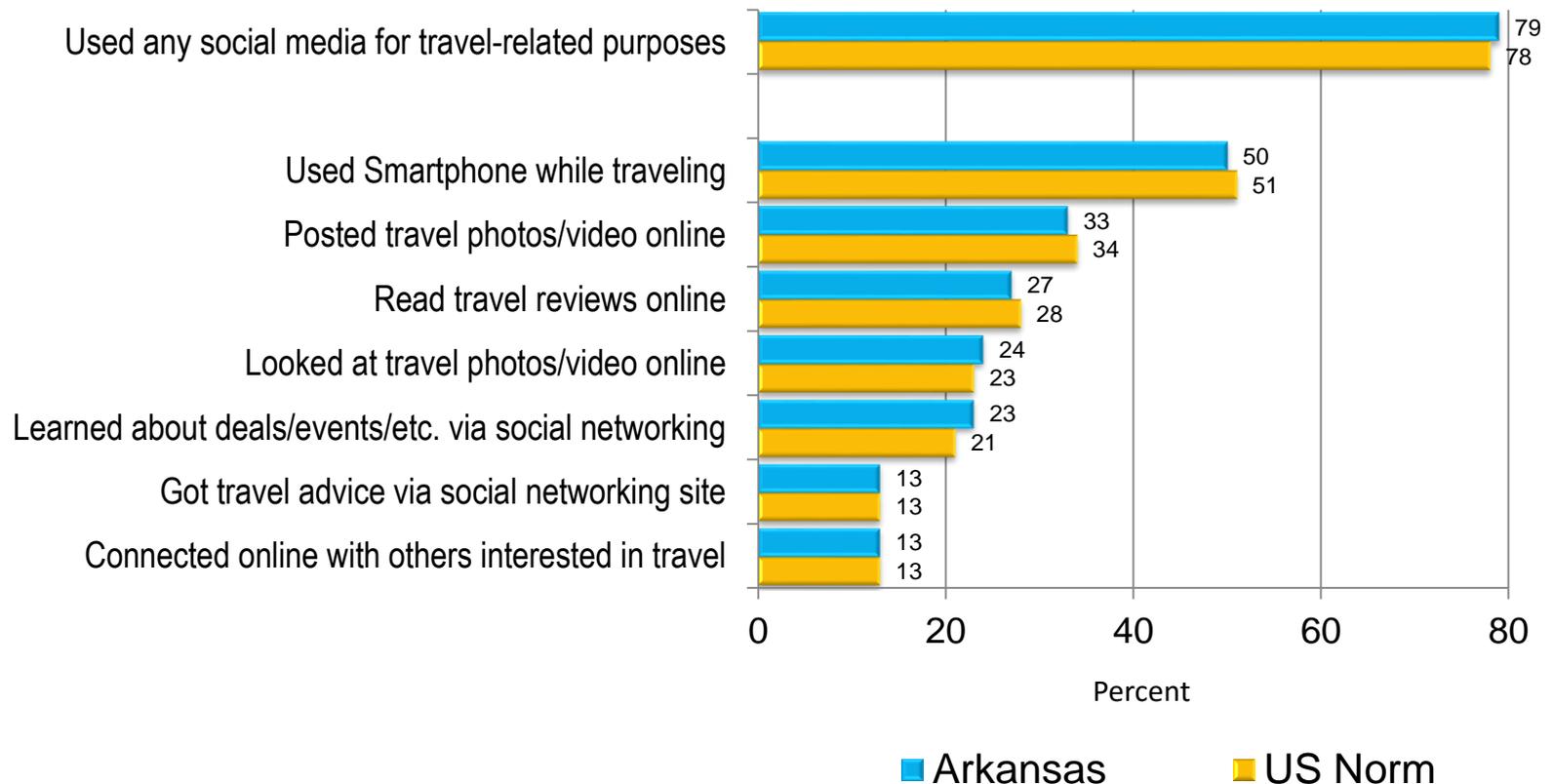
Use of Devices During Trip



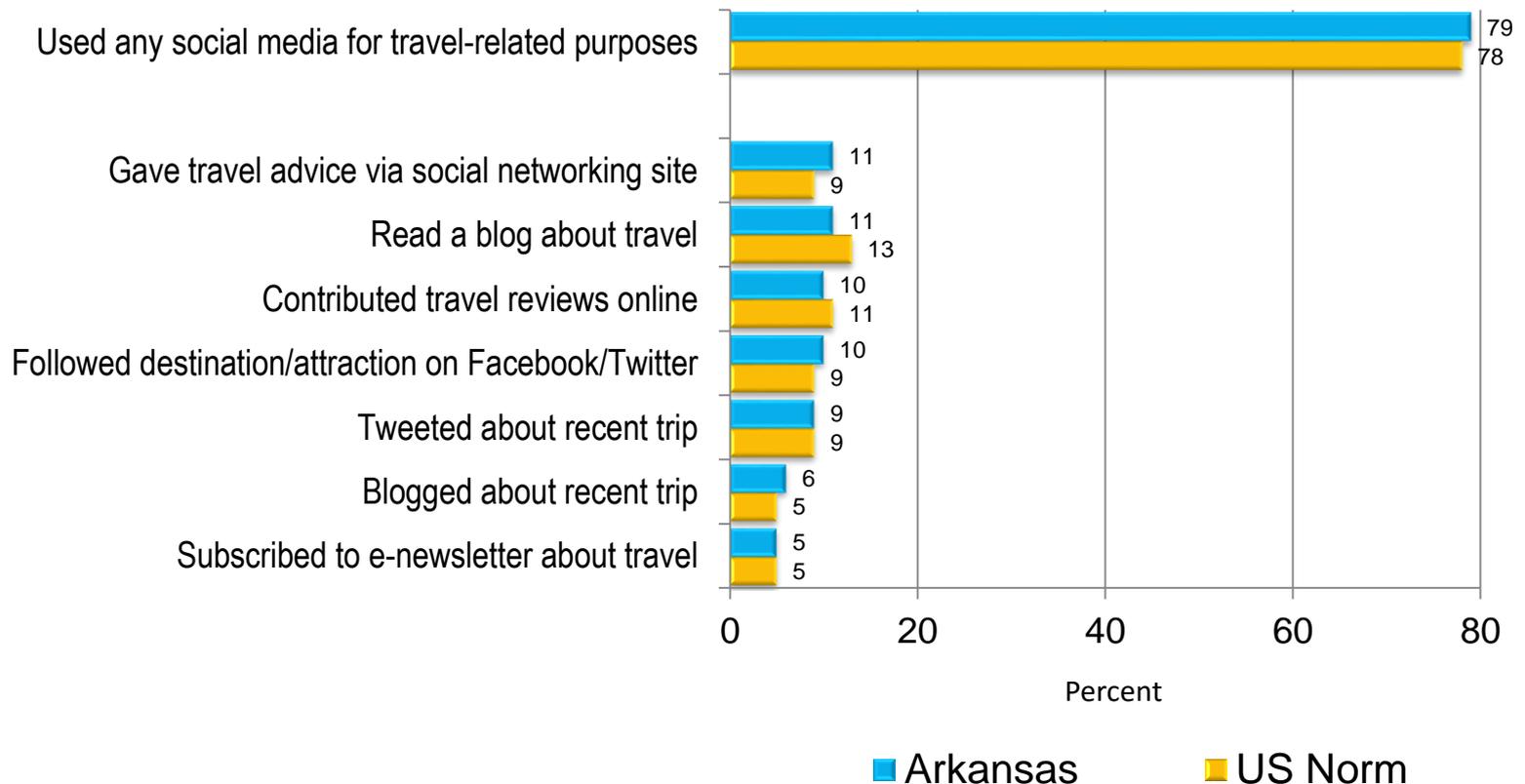
Base: Adult Overnight Leisure Trips



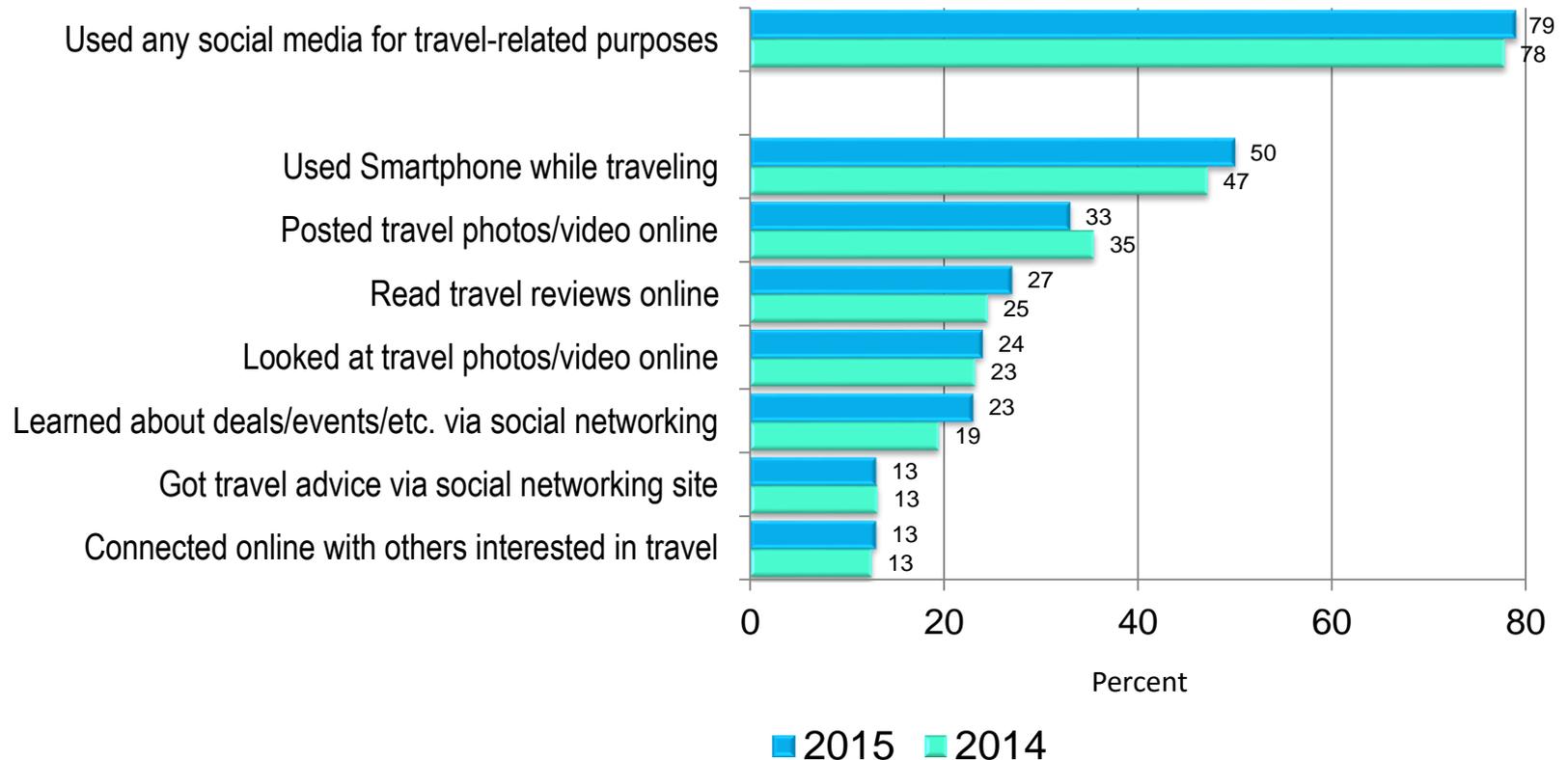
Social Media Used in the Past 3 Months by Overnight Travelers



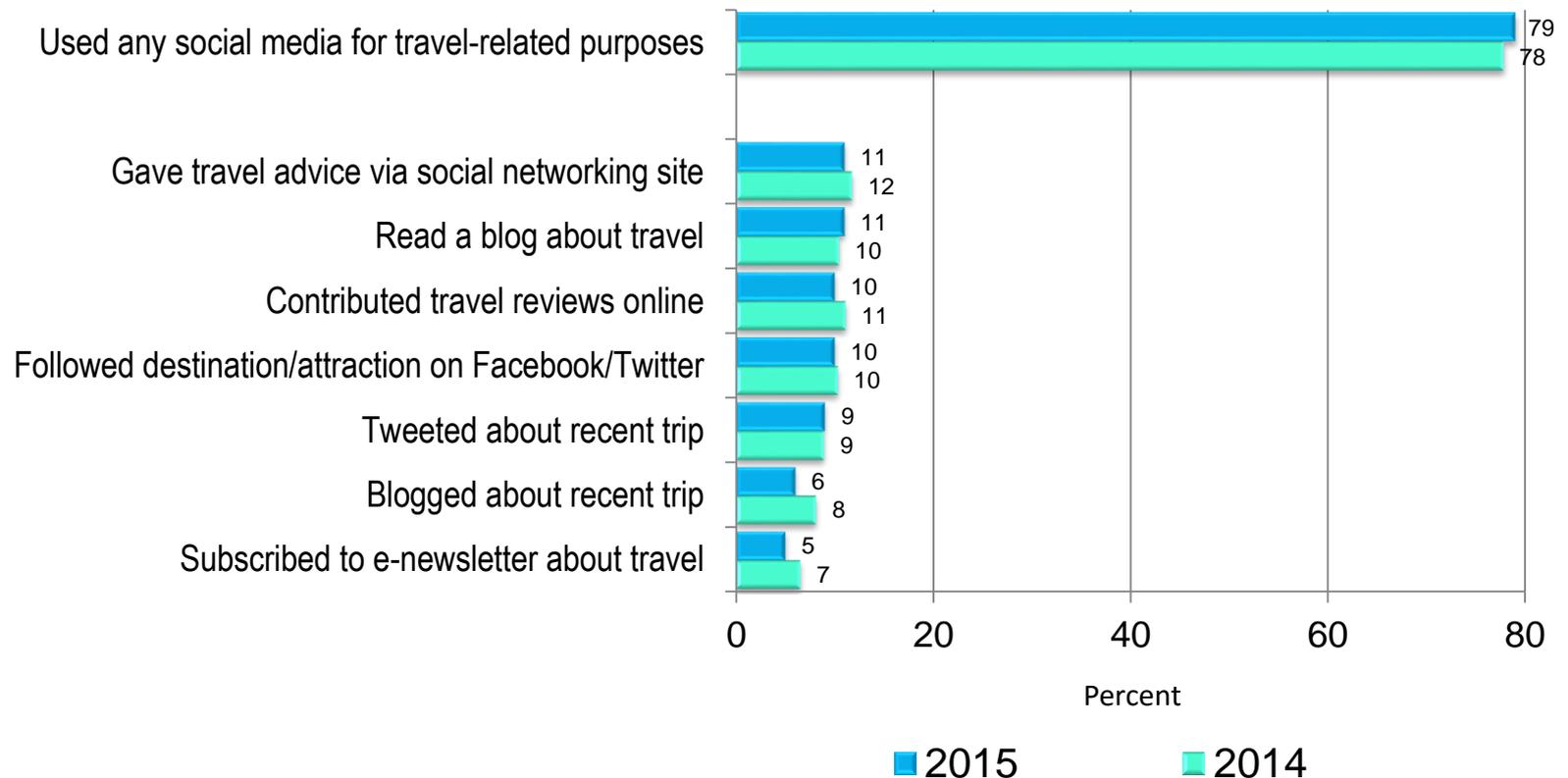
Social Media Used in the Past 3 Months by Overnight Travelers (Cont'd)



Social Media Used in the Past 3 Months by Overnight Travelers



Social Media Used in the Past 3 Months by Overnight Travelers (Cont'd)



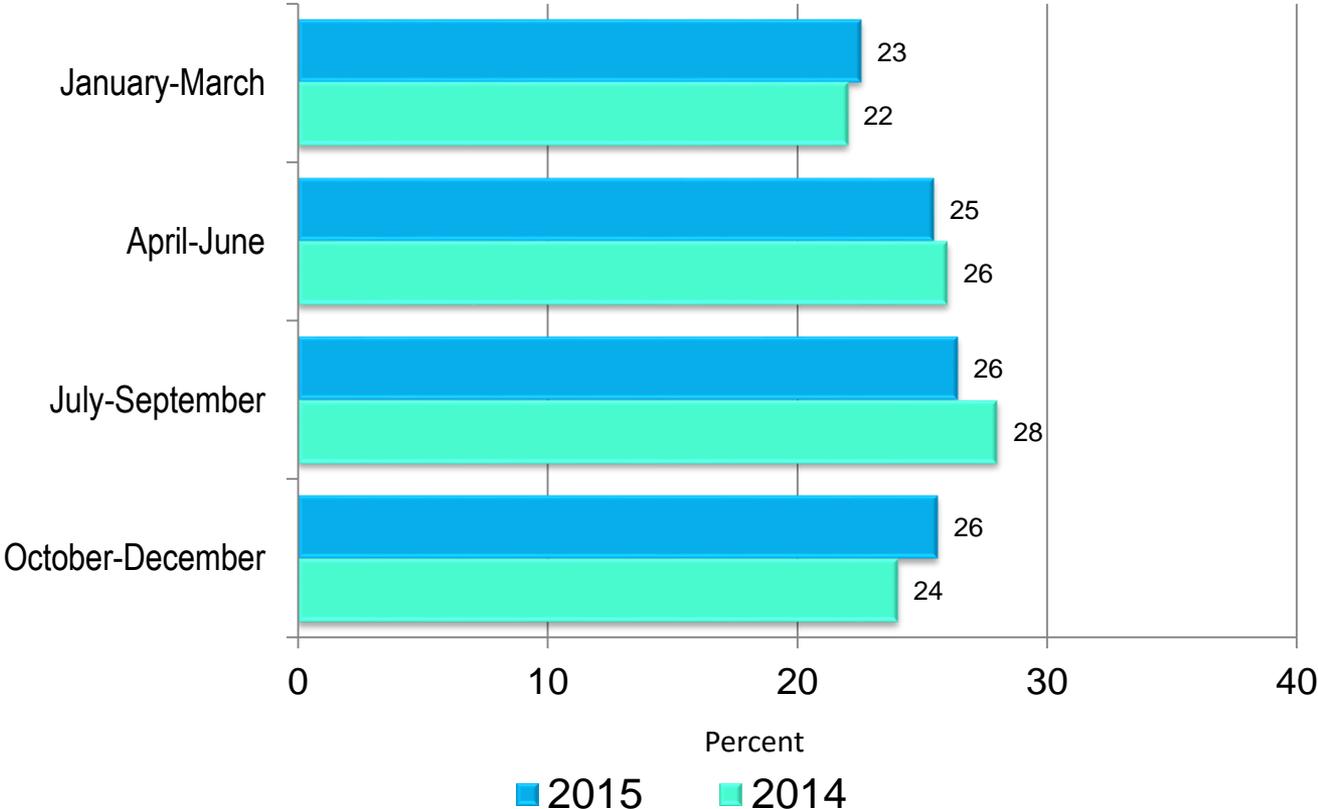


Overnight Leisure Trips Characteristics

Season of Travel



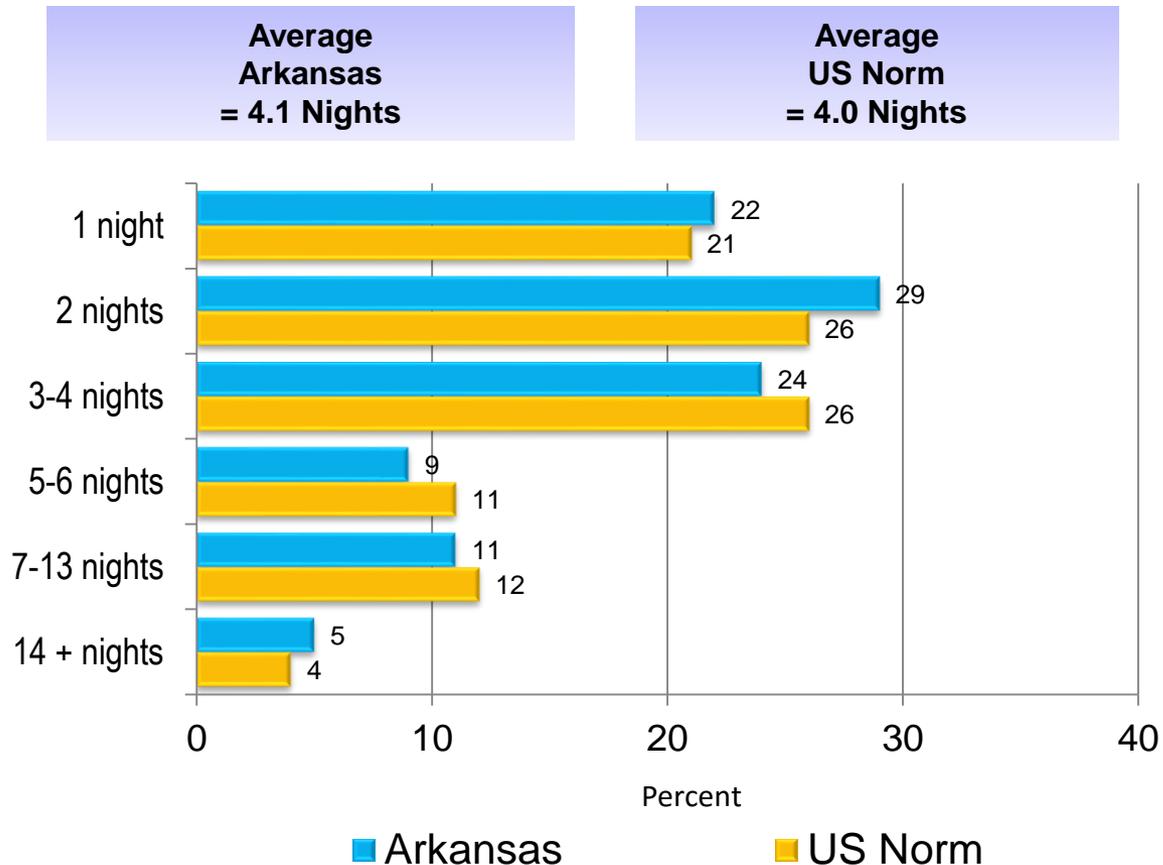
Base: Adult Overnight Leisure Trips to Arkansas



Total Nights Away on Trip



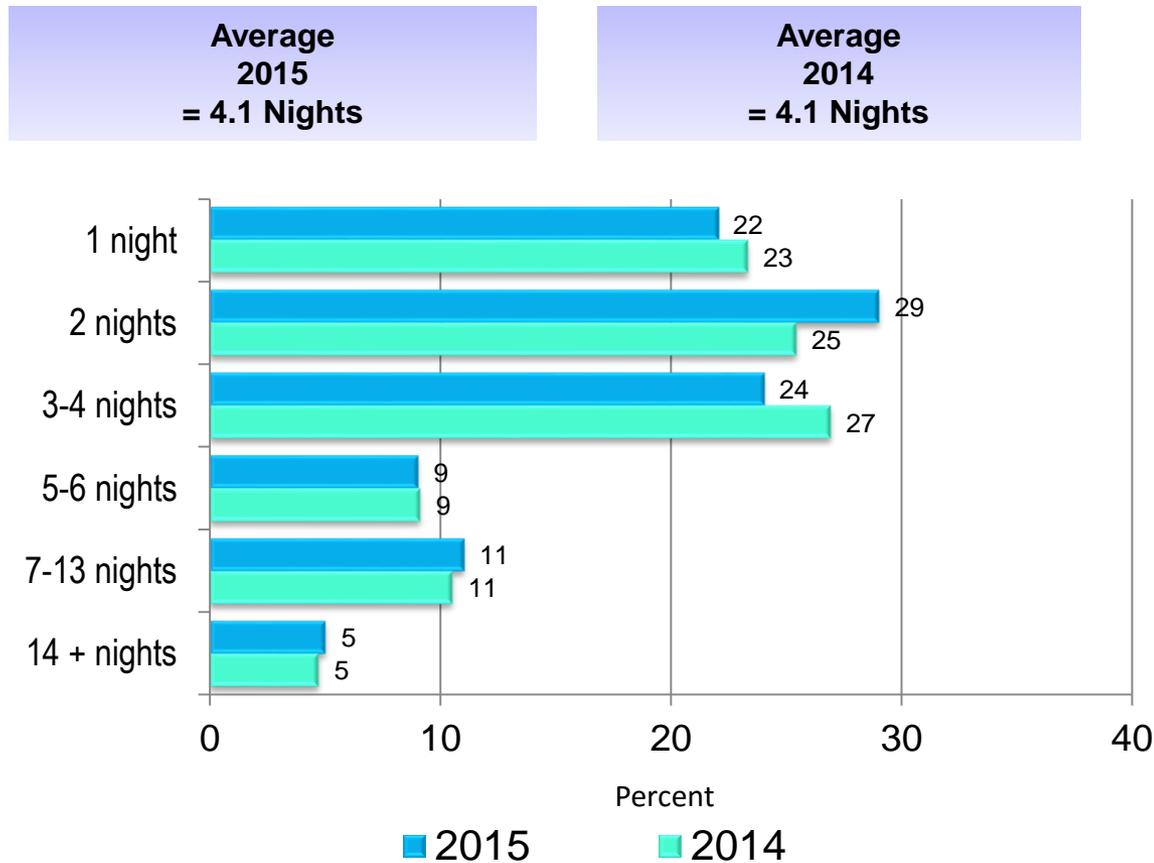
Base: Adult Overnight Leisure Trips



Total Nights Away on Trip



Base: Adult Overnight Leisure Trips

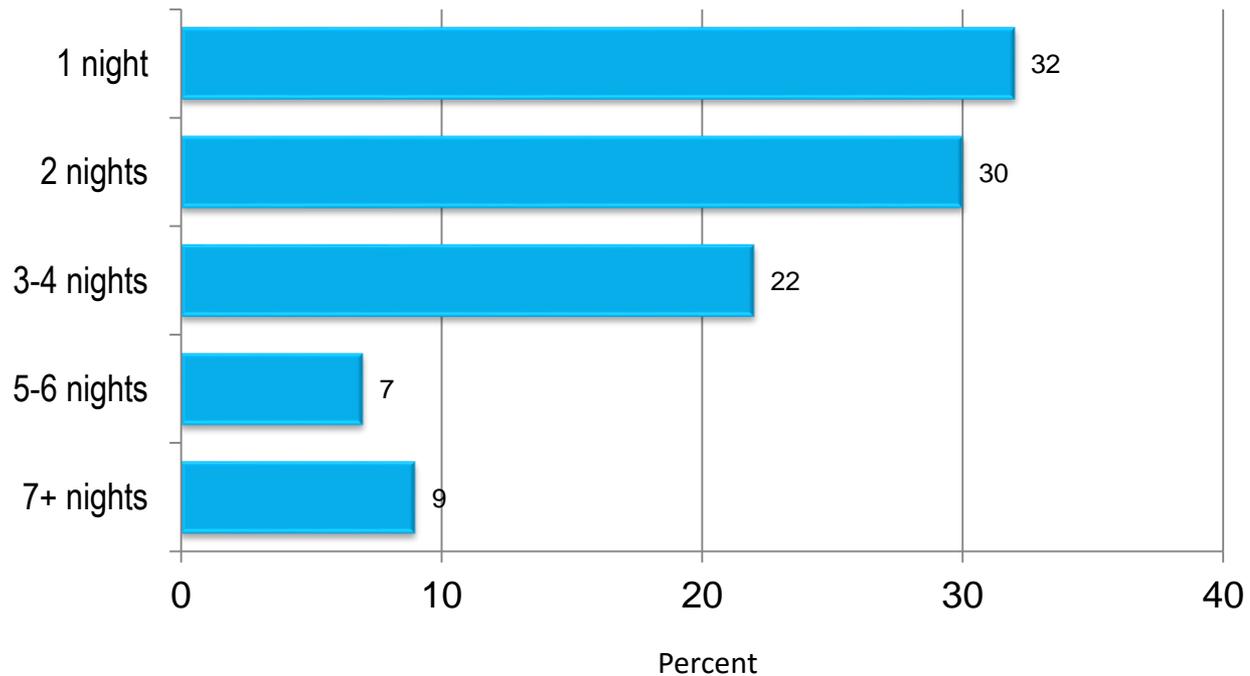


Number of Nights Spent in Arkansas



Base: Adult Overnight Leisure Trips with 1+ Nights Spent In Arkansas

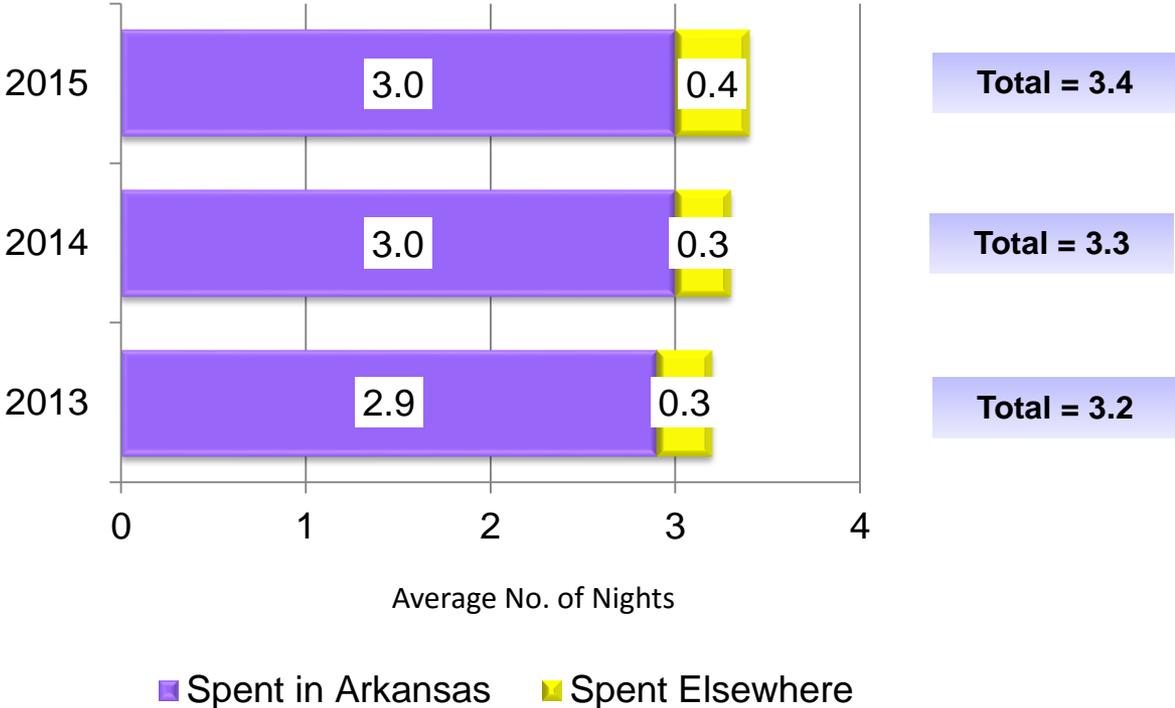
Average Nights Spent in Arkansas = 3.0



Length of Trip



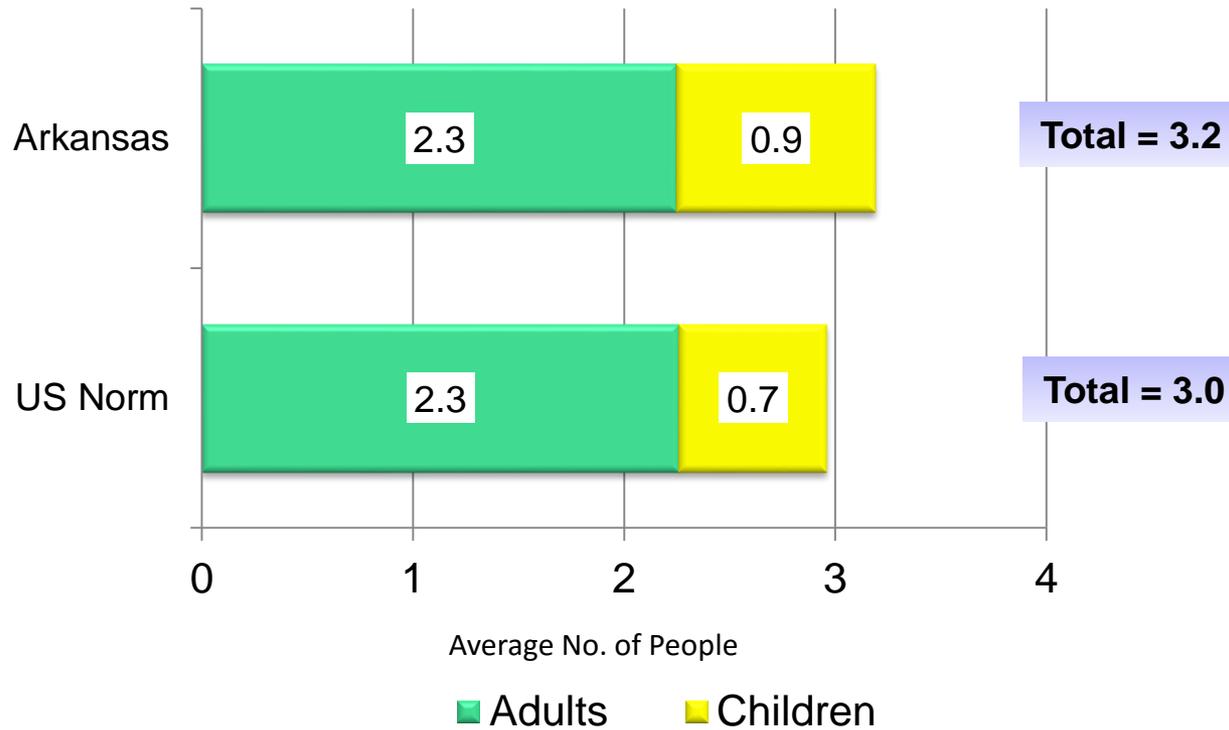
Base: Adult Overnight Leisure Trips with 1+ Nights Spent In Arkansas



Size of Travel Party



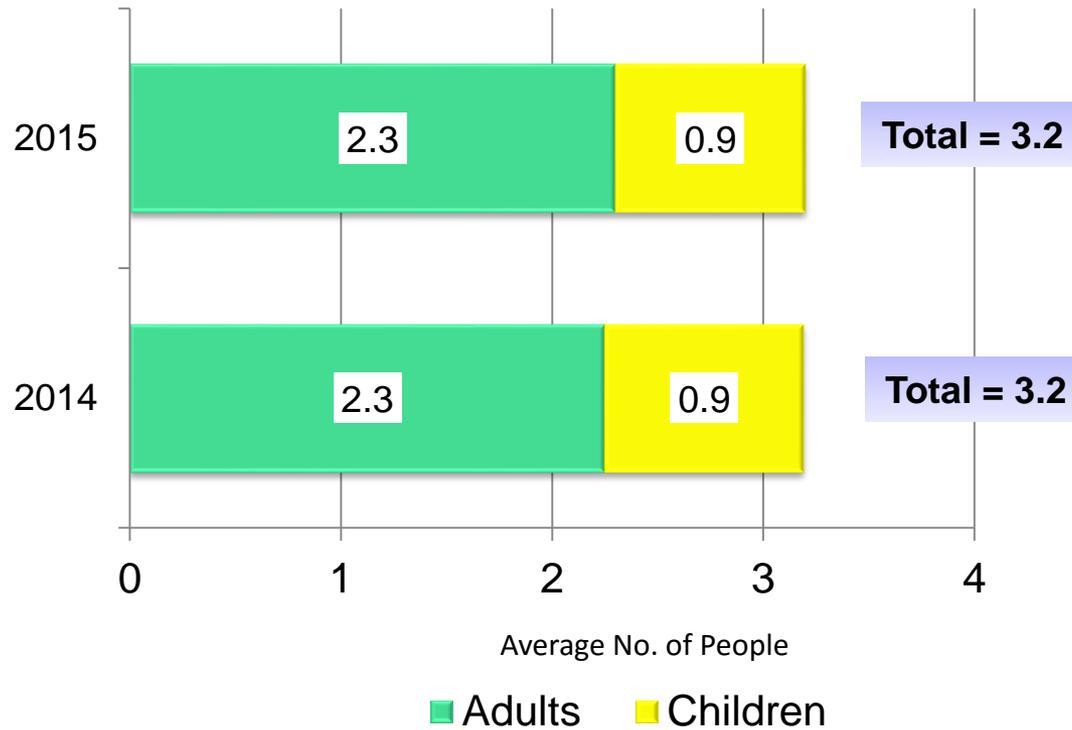
Base: Total Overnight Leisure Trips



Size of Travel Party



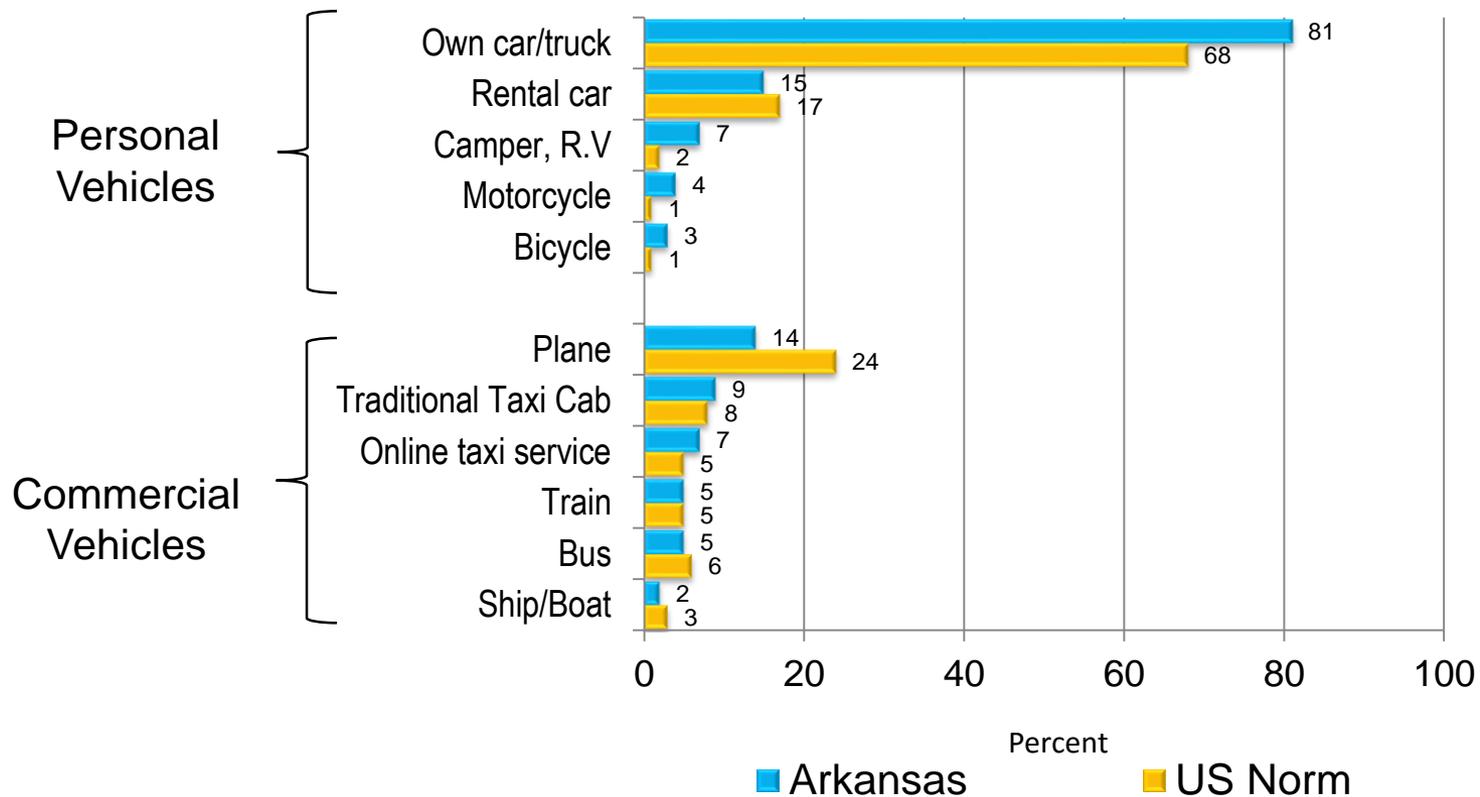
Base: Total Overnight Leisure Trips to Arkansas



Transportation



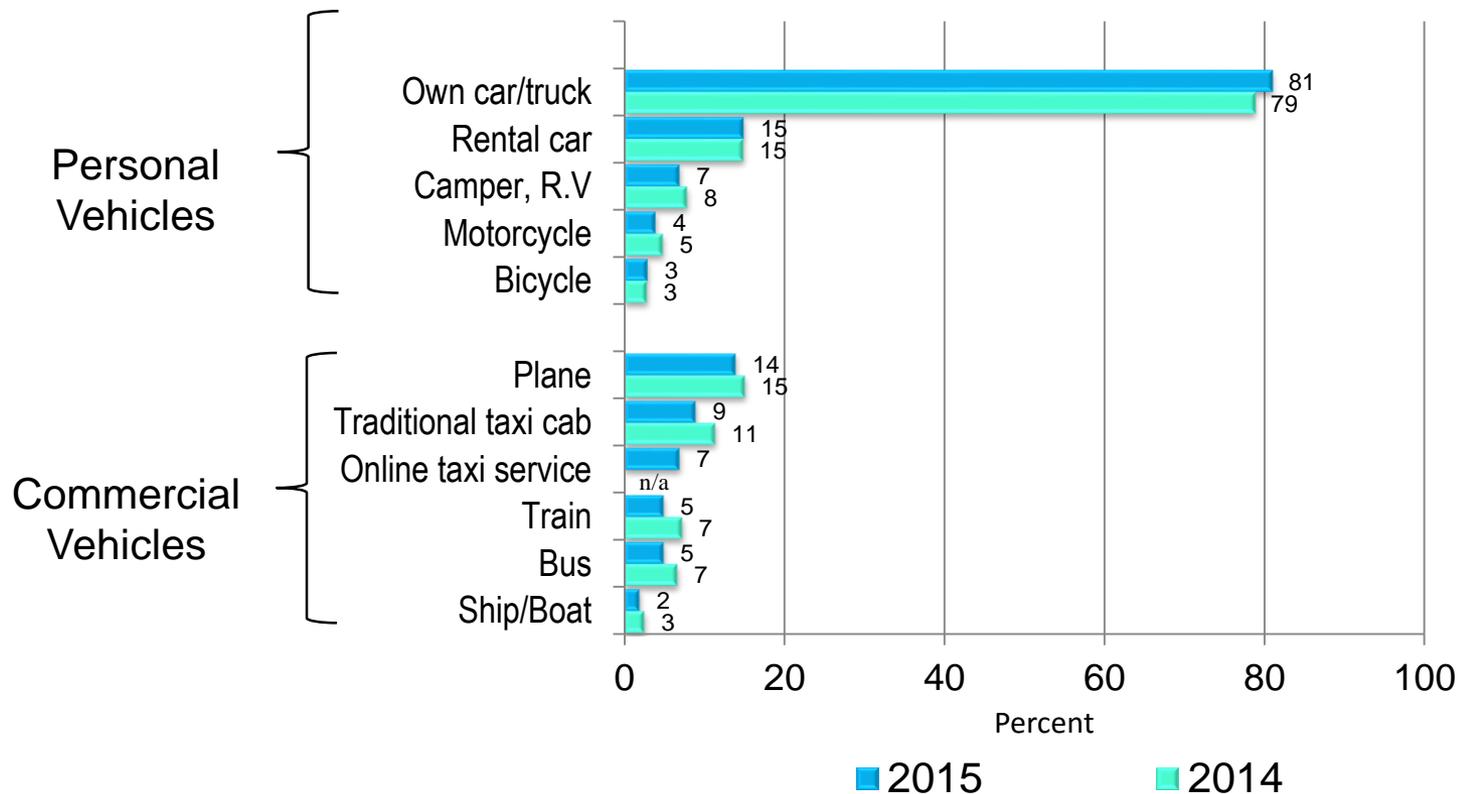
Base: Adult Overnight Leisure Trips



Transportation



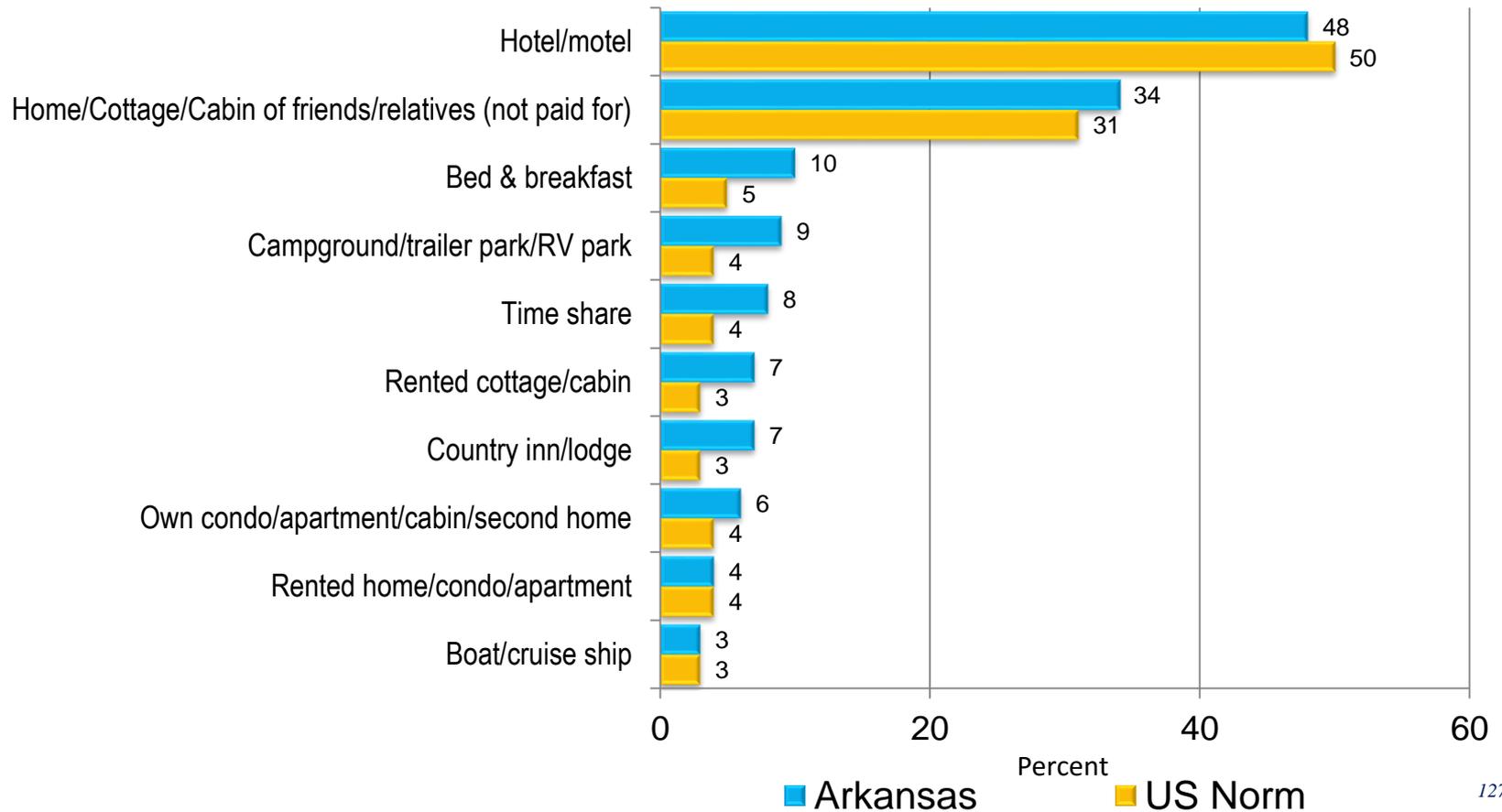
Base: Adult Overnight Leisure Trips to Arkansas



Accommodations



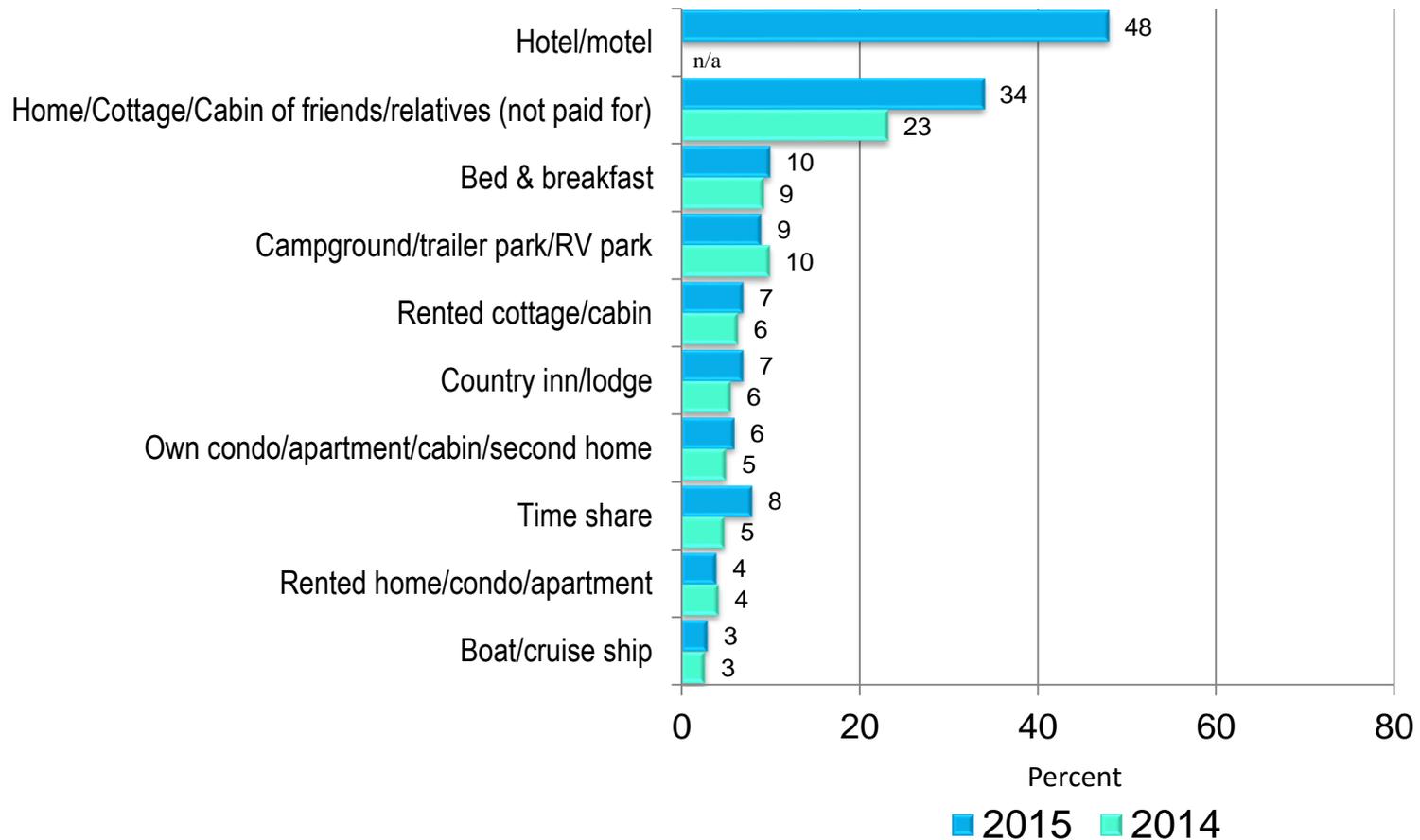
Base: Adult Overnight Leisure Trips



Accommodations



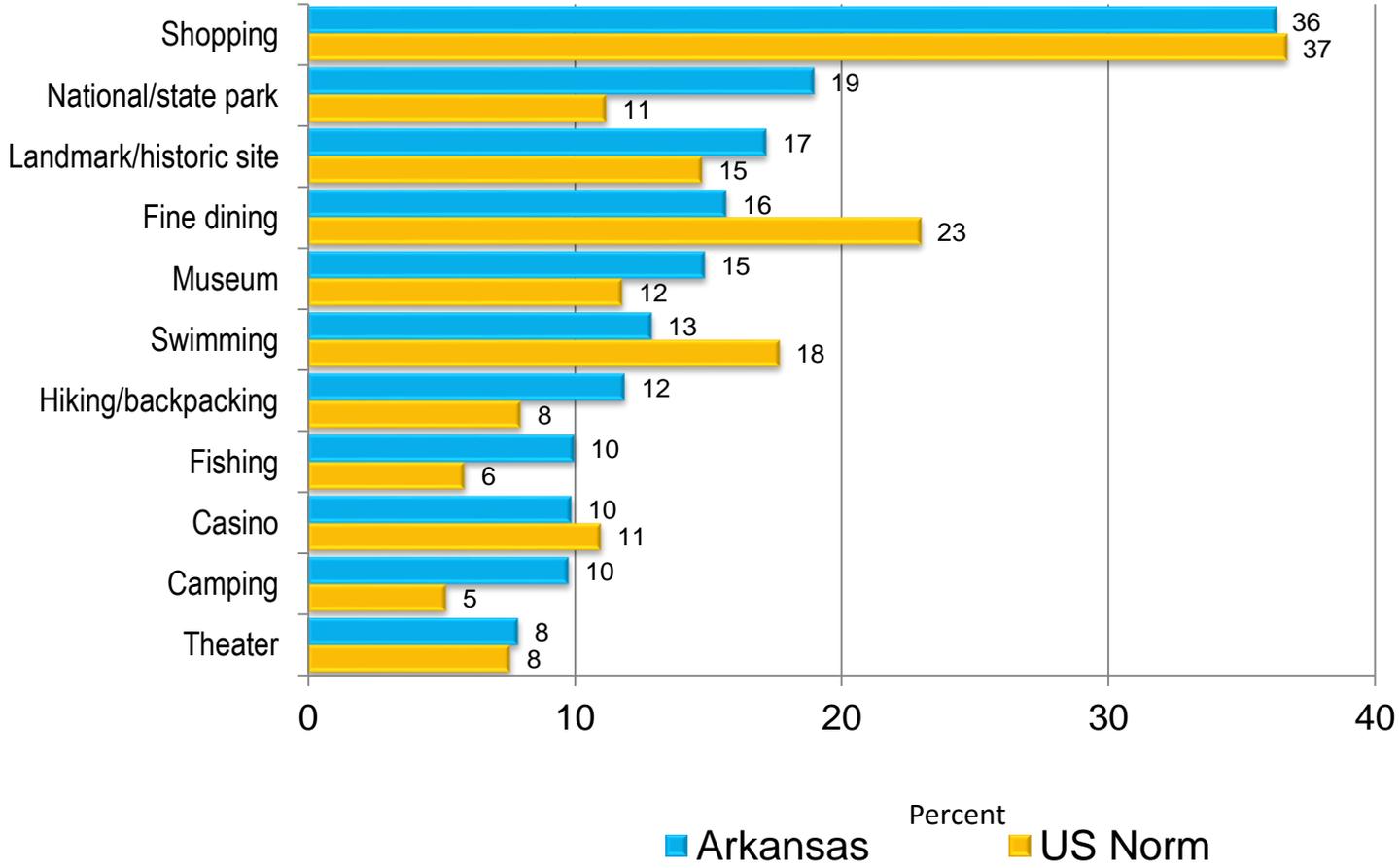
Base: Adult Overnight Leisure Trips to Arkansas



Activities and Experiences



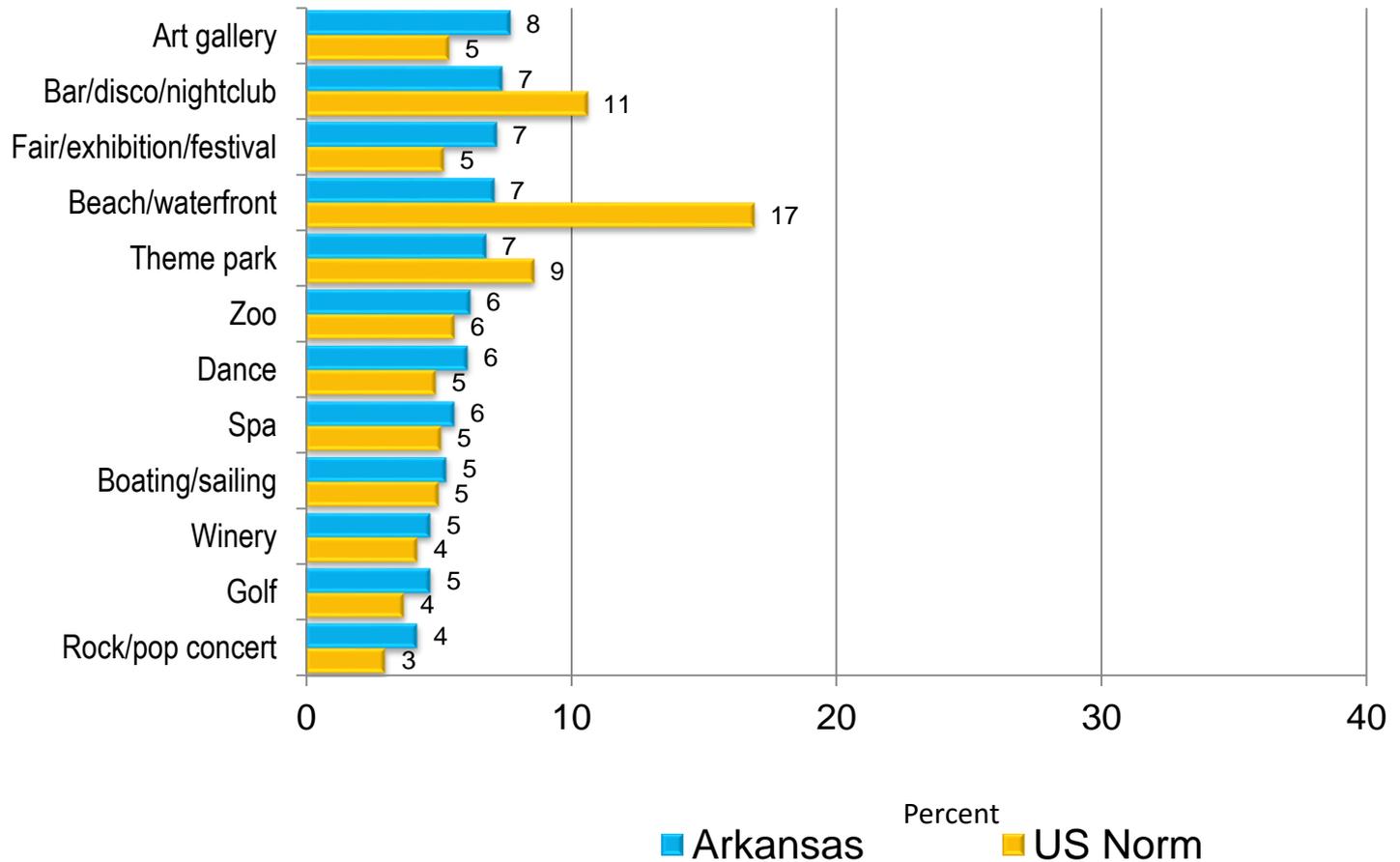
Base: Adult Overnight Leisure Trips



Activities and Experiences (Cont'd)



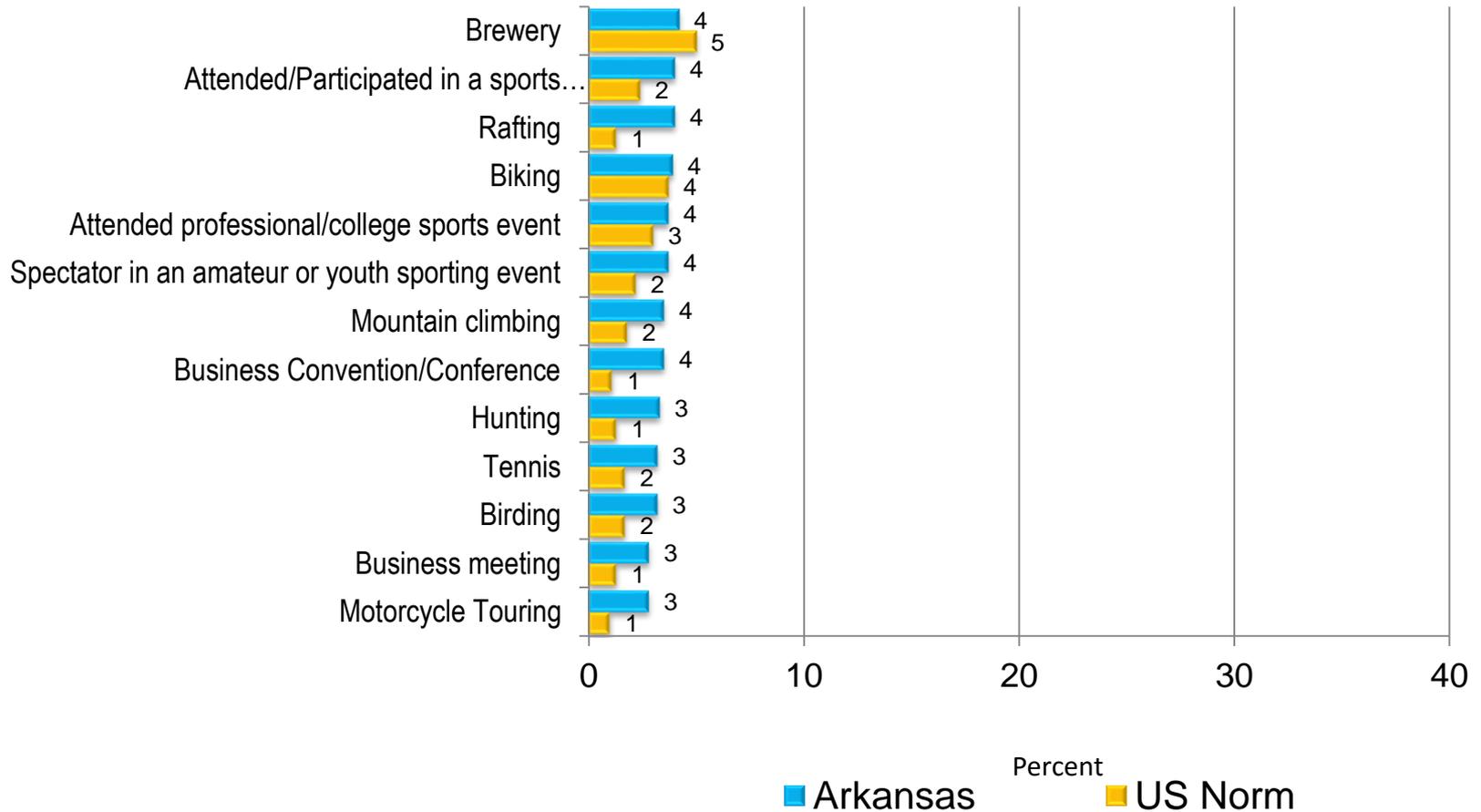
Base: Adult Overnight Leisure Trips



Activities and Experiences (Cont'd)



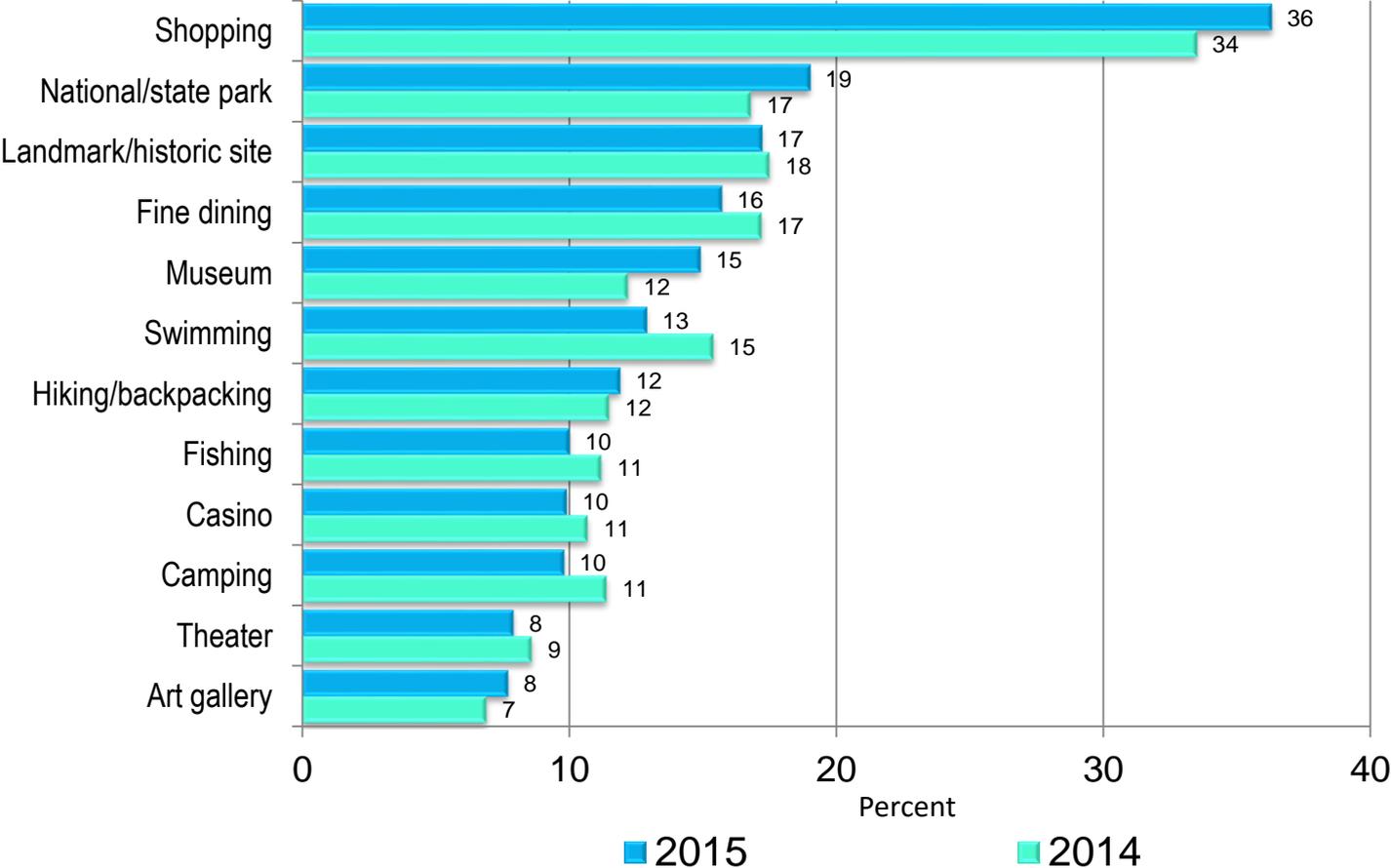
Base: Adult Overnight Leisure Trips



Activities and Experiences



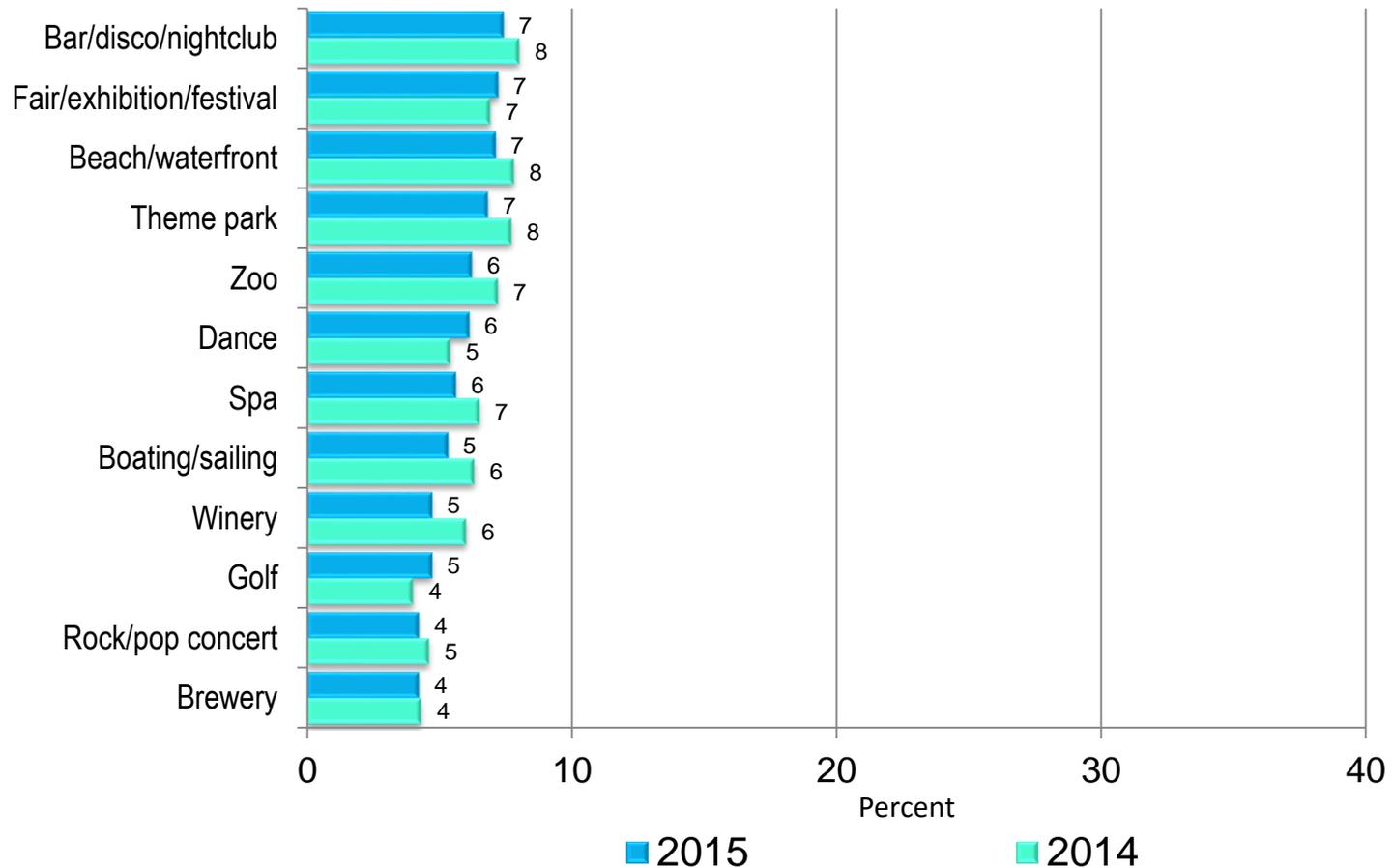
Base: Adult Overnight Leisure Trips to Arkansas



Activities and Experiences (Cont'd)



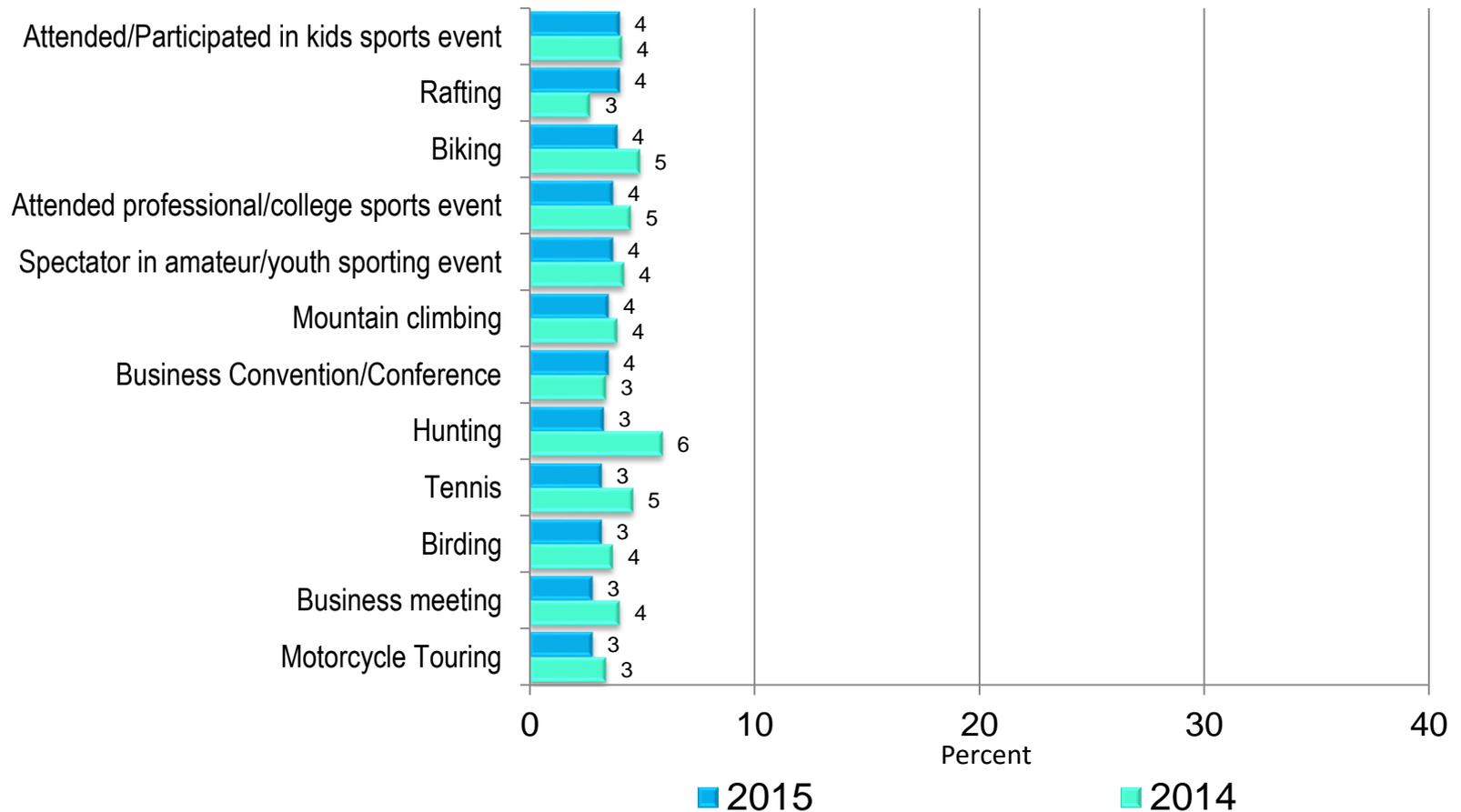
Base: Adult Overnight Leisure Trips to Arkansas



Activities and Experiences (Cont'd)



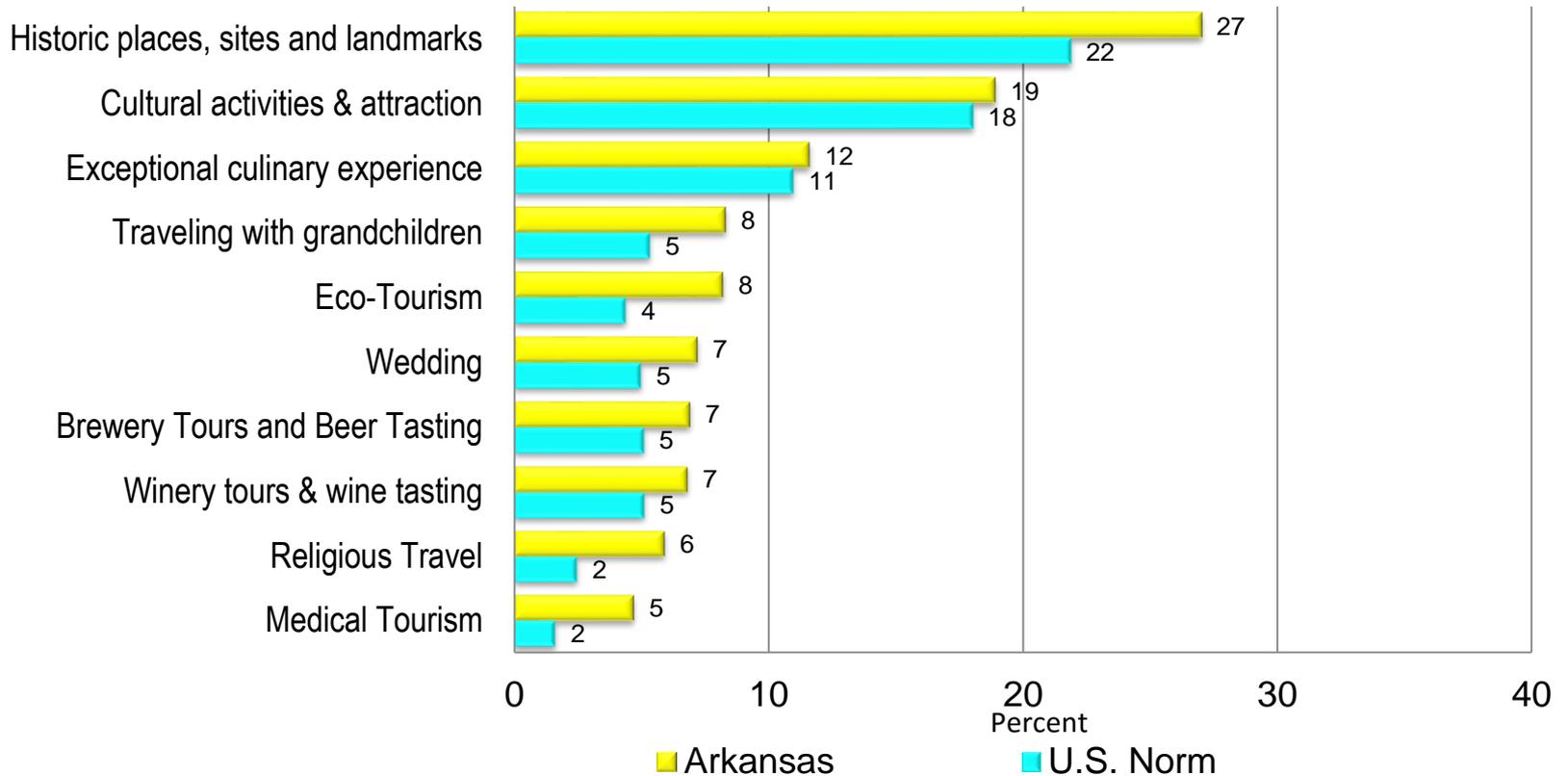
Base: Adult Overnight Leisure Trips to Arkansas



Specific Interests on Trip



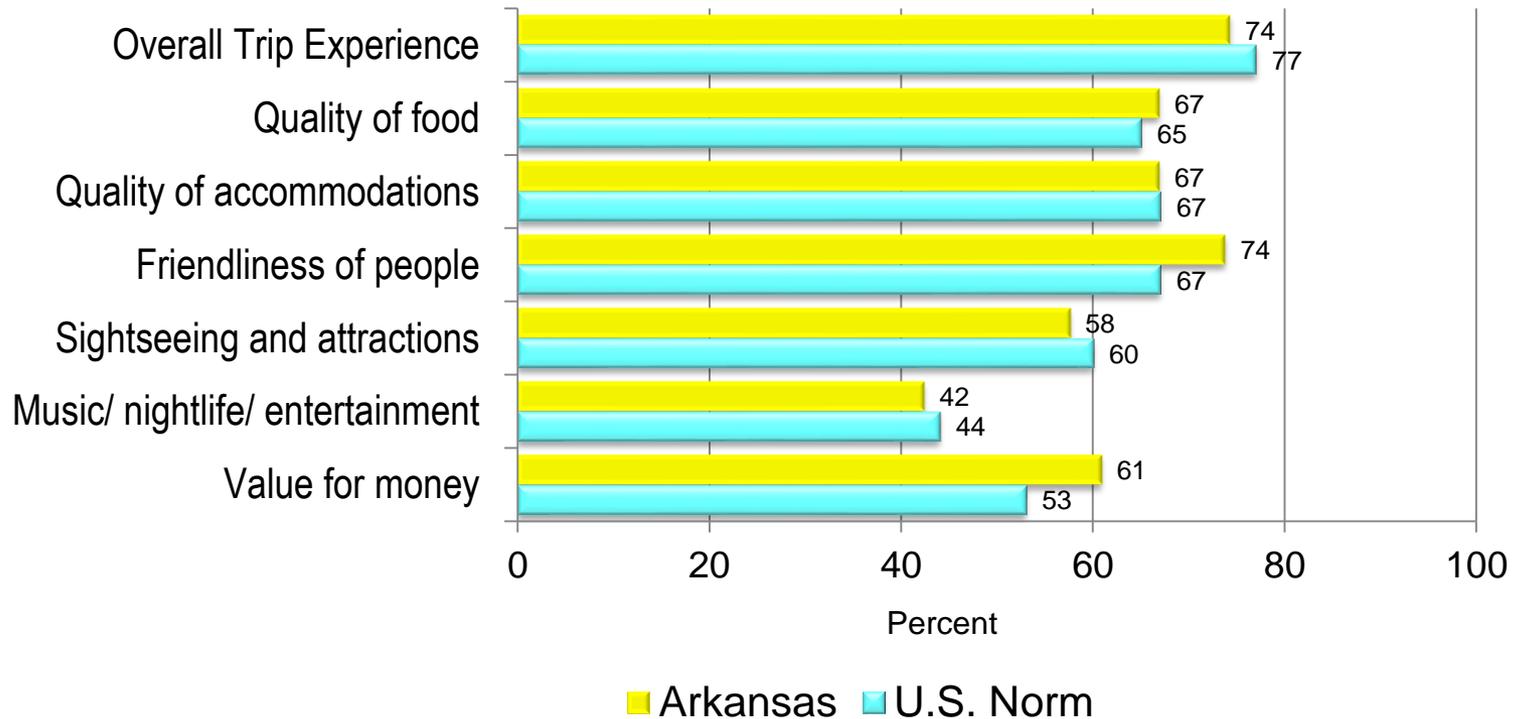
Base: Adult Overnight Leisure Trips



Satisfaction with Trip — % Very Satisfied



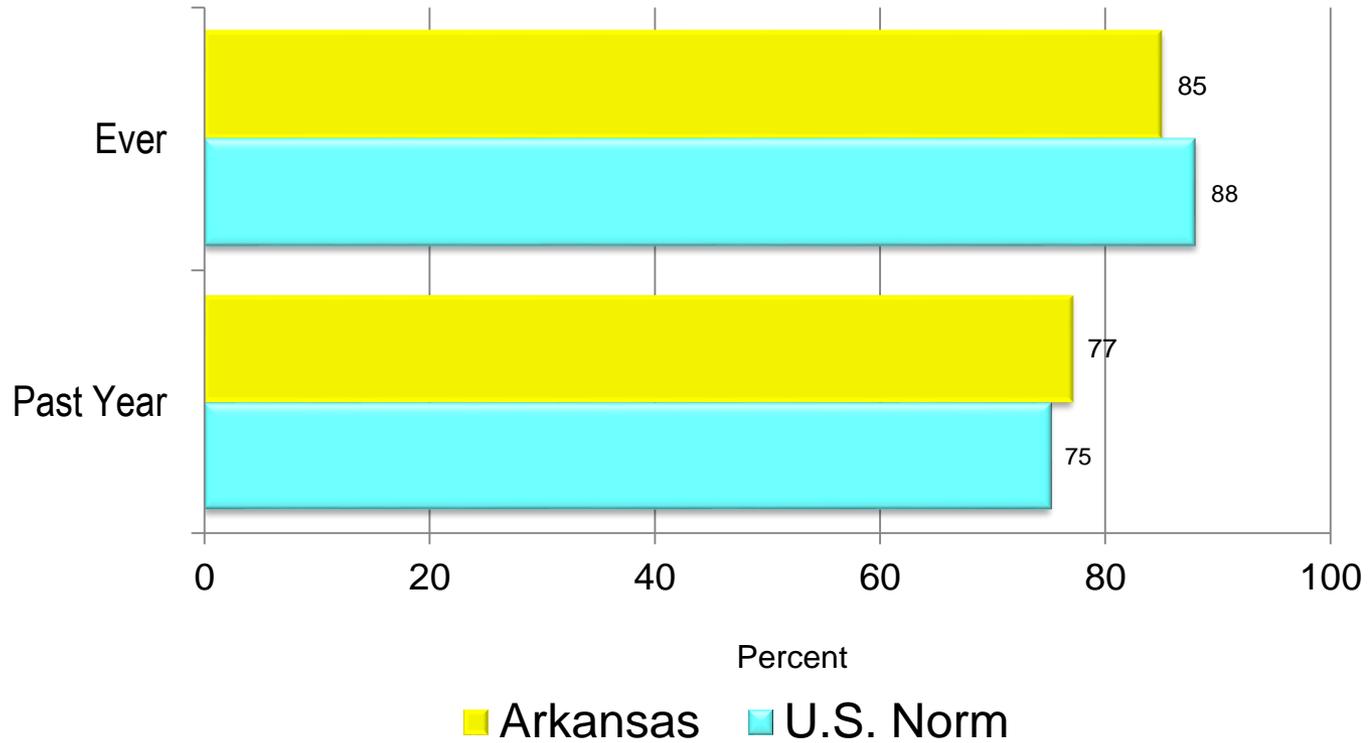
Base: Adult Overnight Leisure Trips



Past Visitation



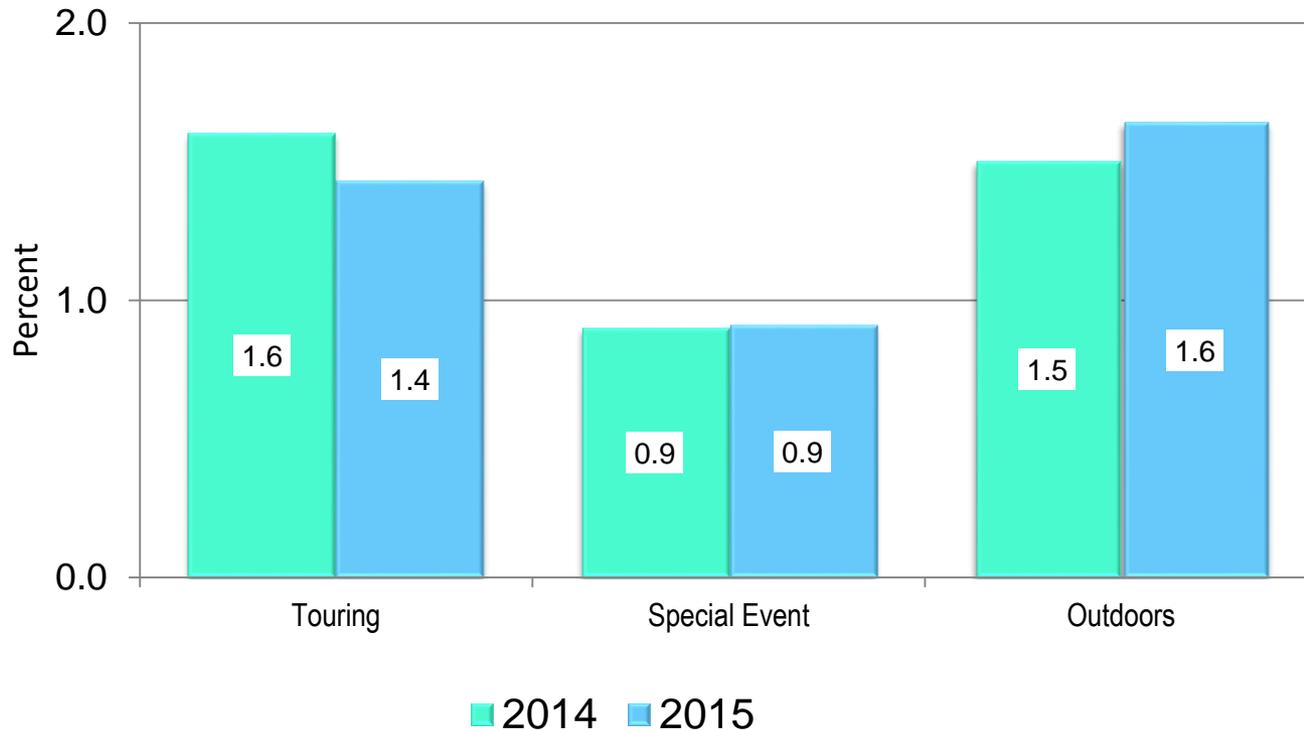
Base: Adult Overnight Leisure Trips





Overnight Segment Profiles— Touring, Outdoors & Special Event Trips

Arkansas's National Share of Key Leisure Segments



Arkansas's Share of Overnight Touring Trips



<u>State</u>	<u>Rank</u>	<u>Share</u>	<u>State</u>	<u>Rank</u>	<u>Share</u>
California	1	11.7%	New Mexico	21	2.4%
Florida	2	8.2%	Missouri	22	2.3%
New York	3	7.5%	Ohio	23	2.2%
Tennessee	4	5.3%	Maine	24	2.0%
Texas	5	4.5%	Utah	25	1.9%
North Carolina	6	4.4%	Wisconsin	26	1.8%
Arizona	7	4.0%	New Jersey	27	1.8%
Colorado	8	4.0%	Alabama	28	1.7%
Pennsylvania	9	3.8%	New Hampshire	29	1.7%
Virginia	10	3.8%	Wyoming	30	1.5%
Georgia	11	3.7%	Kentucky	31	1.5%
Nevada	12	3.3%	Maryland	32	1.4%
Oregon	13	3.2%	Arkansas	33	1.4%
Hawaii	14	3.1%	Indiana	34	1.3%
Washington	15	3.0%	Alaska	35	1.3%
South Carolina	16	3.0%	South Dakota	36	1.1%
Illinois	17	2.9%	Vermont	37	1.1%
Massachusetts	18	2.7%	Minnesota	38	1.1%
Michigan	19	2.6%	Montana	39	1.0%
Louisiana	20	2.4%	Connecticut	40	1.0%

Arkansas's Share of Overnight Special Event



<u>State</u>	<u>Rank</u>	<u>Share</u>	<u>State</u>	<u>Rank</u>	<u>Share</u>
California	1	9.6%	Colorado	21	2.2%
Florida	2	8.3%	Louisiana	22	2.1%
New York	3	6.5%	Oregon	23	1.9%
Texas	4	5.9%	South Carolina	24	1.8%
Pennsylvania	5	4.4%	Kentucky	25	1.8%
Illinois	6	4.2%	Minnesota	26	1.7%
Ohio	7	4.1%	Maryland	27	1.6%
Nevada	8	3.6%	Alabama	28	1.6%
Georgia	9	3.3%	Connecticut	29	1.3%
North Carolina	10	3.2%	Utah	30	1.0%
Tennessee	11	3.0%	Iowa	31	1.0%
Indiana	12	2.8%	Oklahoma	32	1.0%
Missouri	13	2.8%	Nebraska	33	1.0%
Wisconsin	14	2.6%	Kansas	34	1.0%
Arizona	15	2.5%	New Mexico	35	1.0%
Virginia	16	2.5%	Mississippi	36	.9%
Michigan	17	2.5%	Arkansas	37	.9%
New Jersey	18	2.4%	New Hampshire	38	.8%
Washington	19	2.4%	South Dakota	39	.7%
Massachusetts	20	2.3%	Maine	40	.7%

Arkansas's Share of Overnight Outdoors Trips



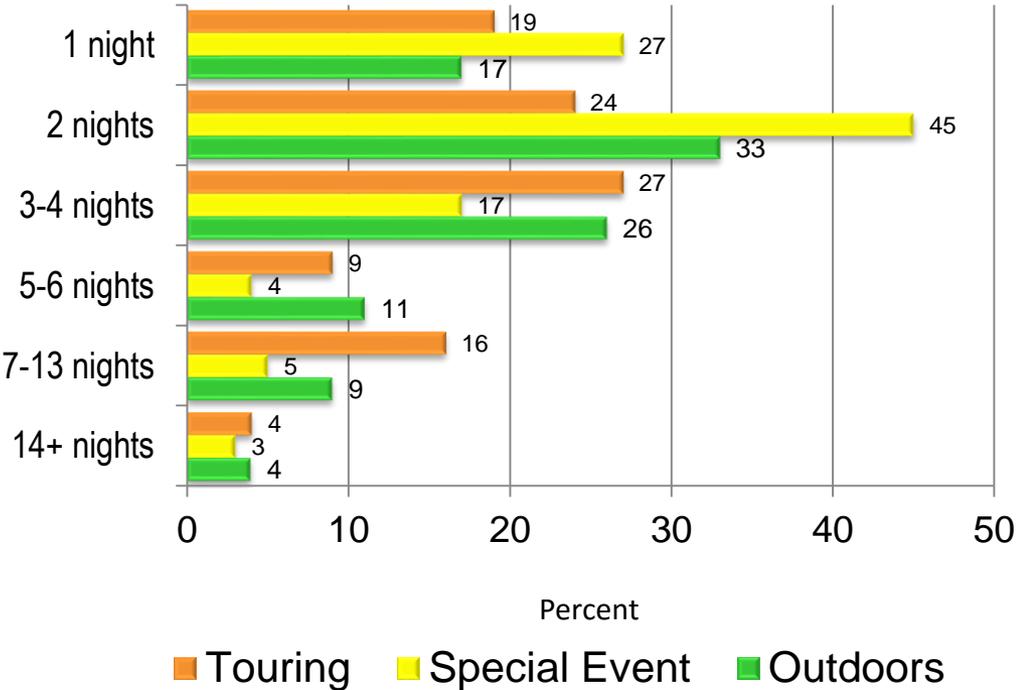
<u>State</u>	<u>Rank</u>	<u>Share</u>	<u>State</u>	<u>Rank</u>	<u>Share</u>
California	1	11.5%	Missouri	21	2.1%
Florida	2	7.8%	Maine	22	2.0%
New York	3	5.7%	New Hampshire	23	2.0%
Texas	4	5.0%	Illinois	24	1.9%
Colorado	5	4.6%	Kentucky	25	1.7%
Michigan	6	3.8%	Indiana	26	1.7%
Oregon	7	3.8%	Alabama	27	1.7%
North Carolina	8	3.8%	South Carolina	28	1.7%
Pennsylvania	9	3.7%	Arkansas	29	1.6%
Washington	10	3.6%	Idaho	30	1.5%
Wisconsin	11	3.6%	Montana	31	1.5%
Tennessee	12	3.3%	New Mexico	32	1.4%
Arizona	13	3.0%	Oklahoma	33	1.4%
Ohio	14	2.7%	Alaska	34	1.3%
Georgia	15	2.5%	Massachusetts	35	1.3%
Virginia	16	2.5%	Maryland	36	1.3%
Utah	17	2.4%	Hawaii	37	1.3%
New Jersey	18	2.2%	West Virginia	38	1.2%
Nevada	19	2.2%	Wyoming	39	1.2%
Minnesota	20	2.1%	Louisiana	40	1.1%

Total Nights Away



Base: Adult Overnight Trips

Touring Average = 4.4	Special Event Average = 3.1	Outdoors Average = 4.2
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Number of Nights Spent in Arkansas

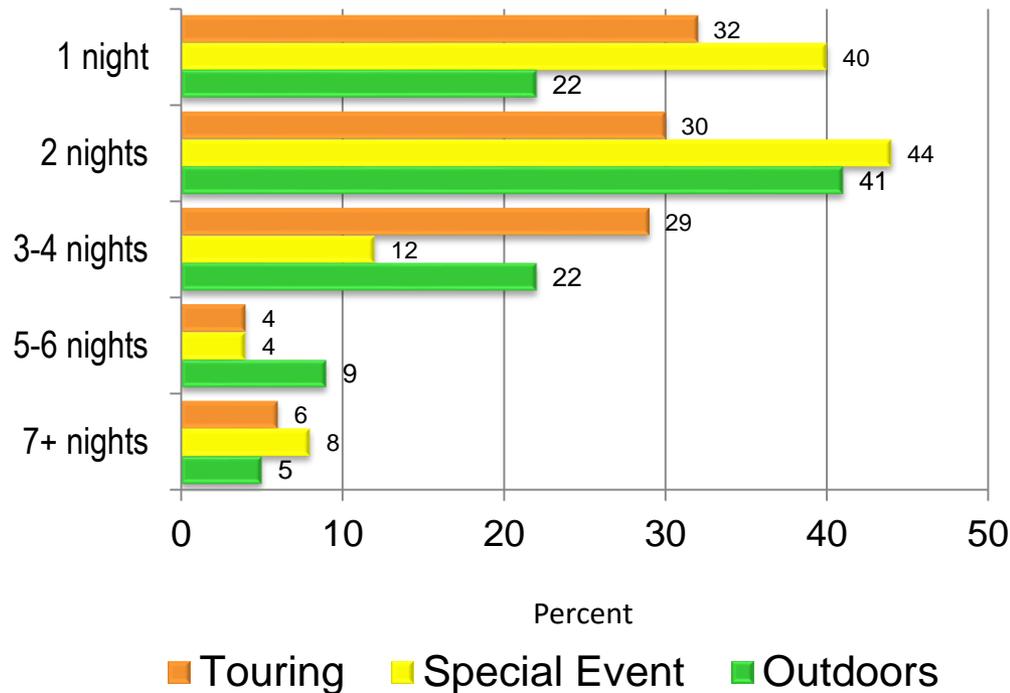


Base: Adult Overnight Trips with 1+ Nights Spent in Arkansas

Touring Average
= 2.6

Special Event Average
= 1.9

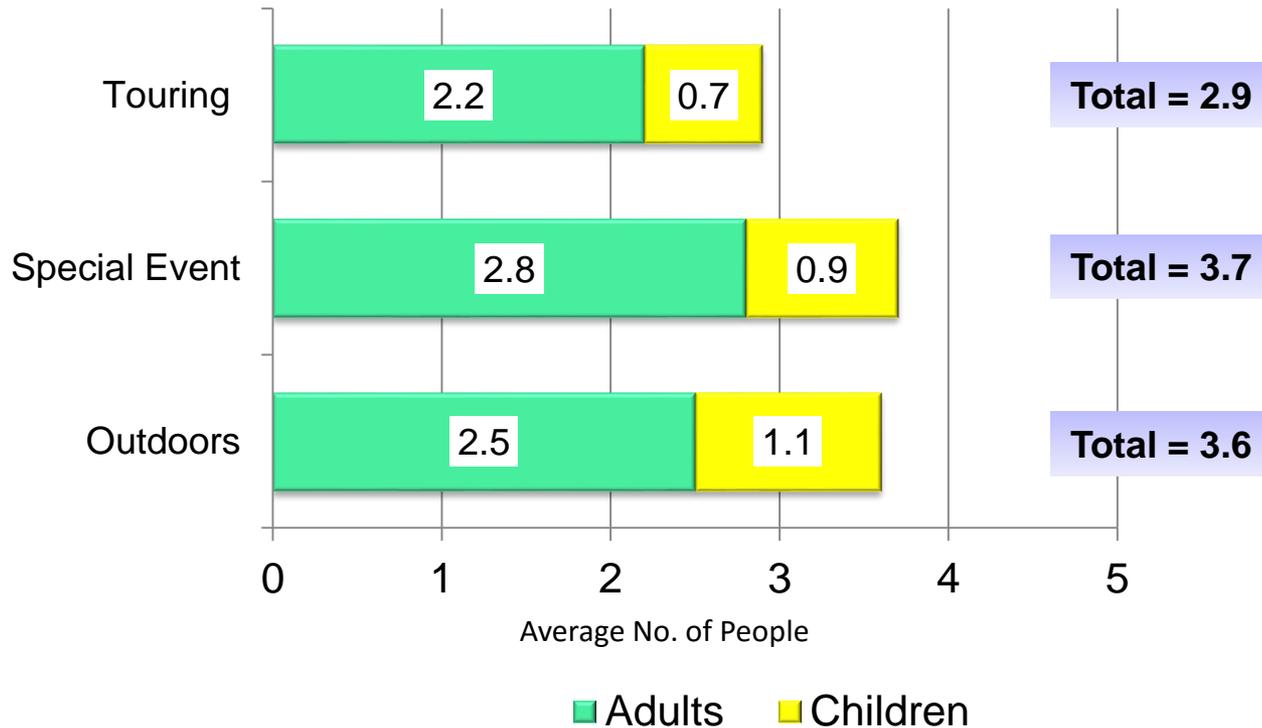
Outdoors Average
= 2.8



Size of Travel Party



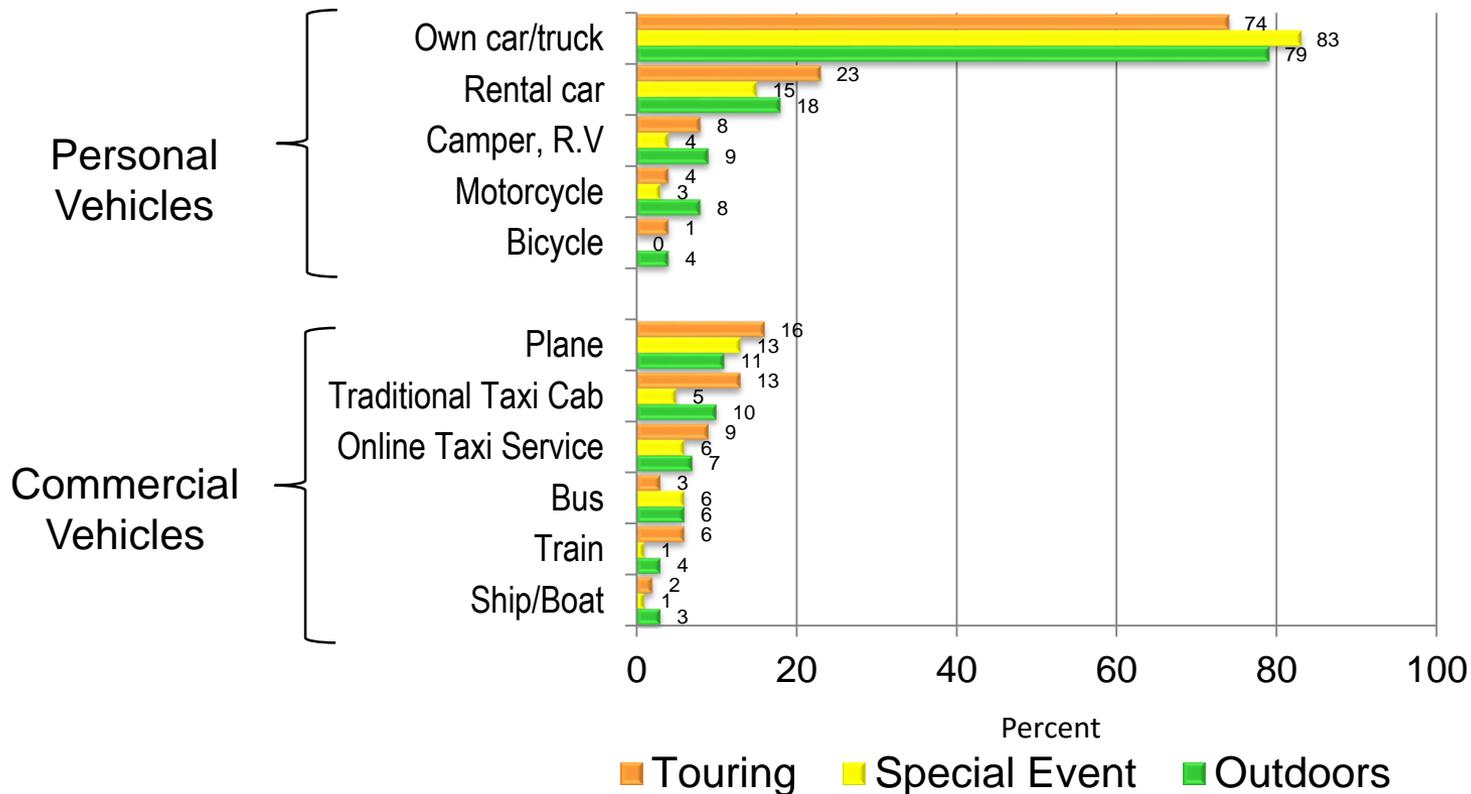
Base: Total Overnight Trips to Arkansas



Transportation



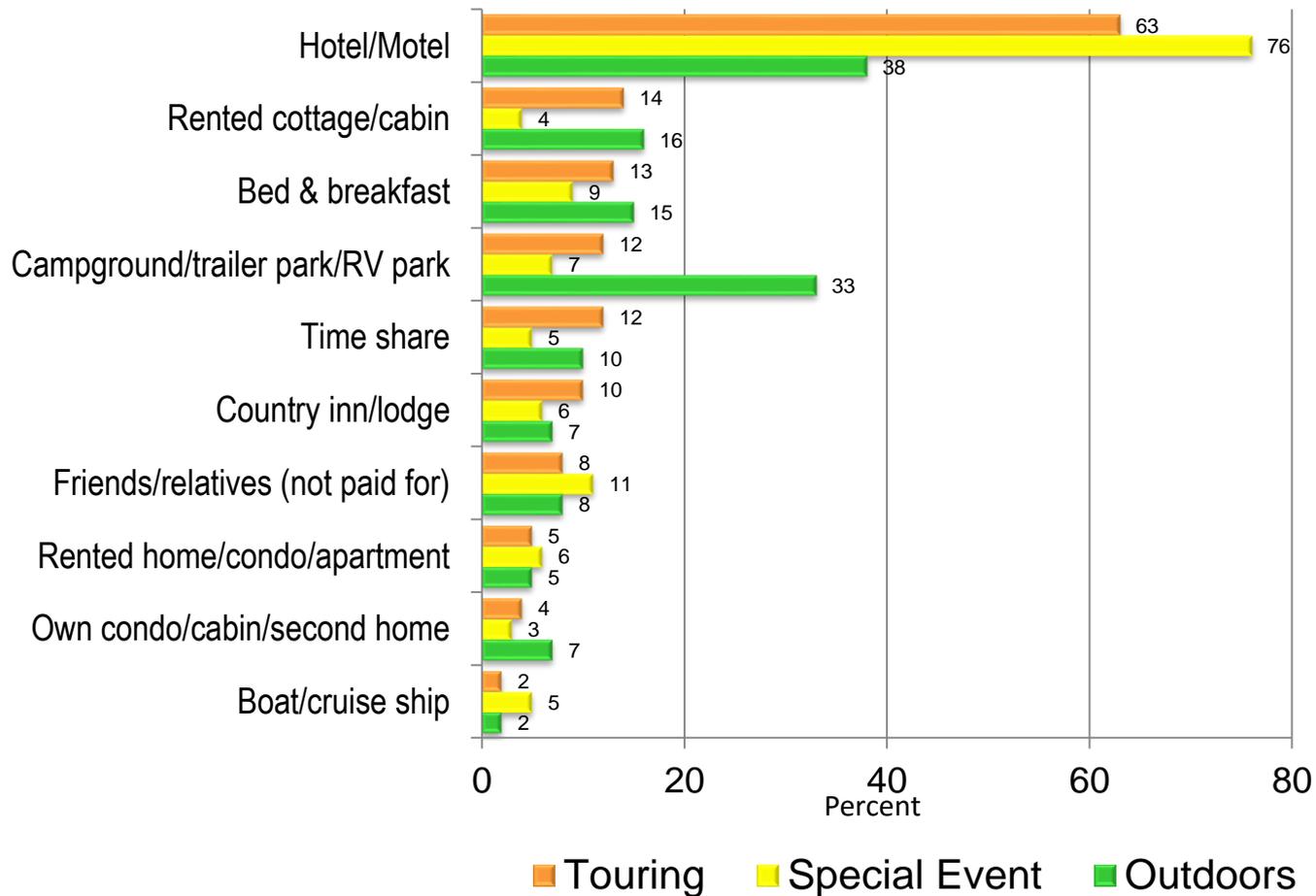
Base: Adult Overnight Trips to Arkansas



Accommodations



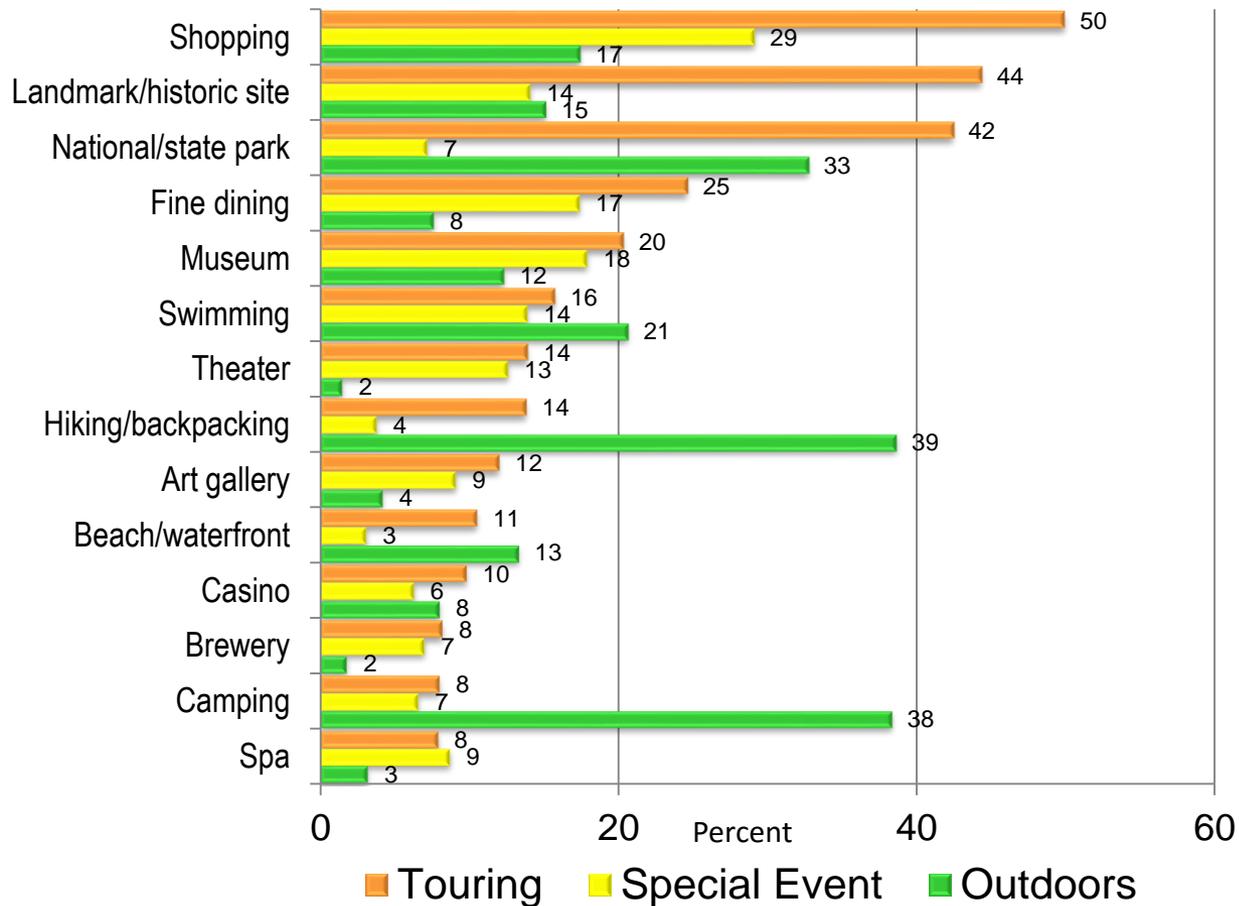
Base: Adult Overnight Trips to Arkansas



Activities and Experiences



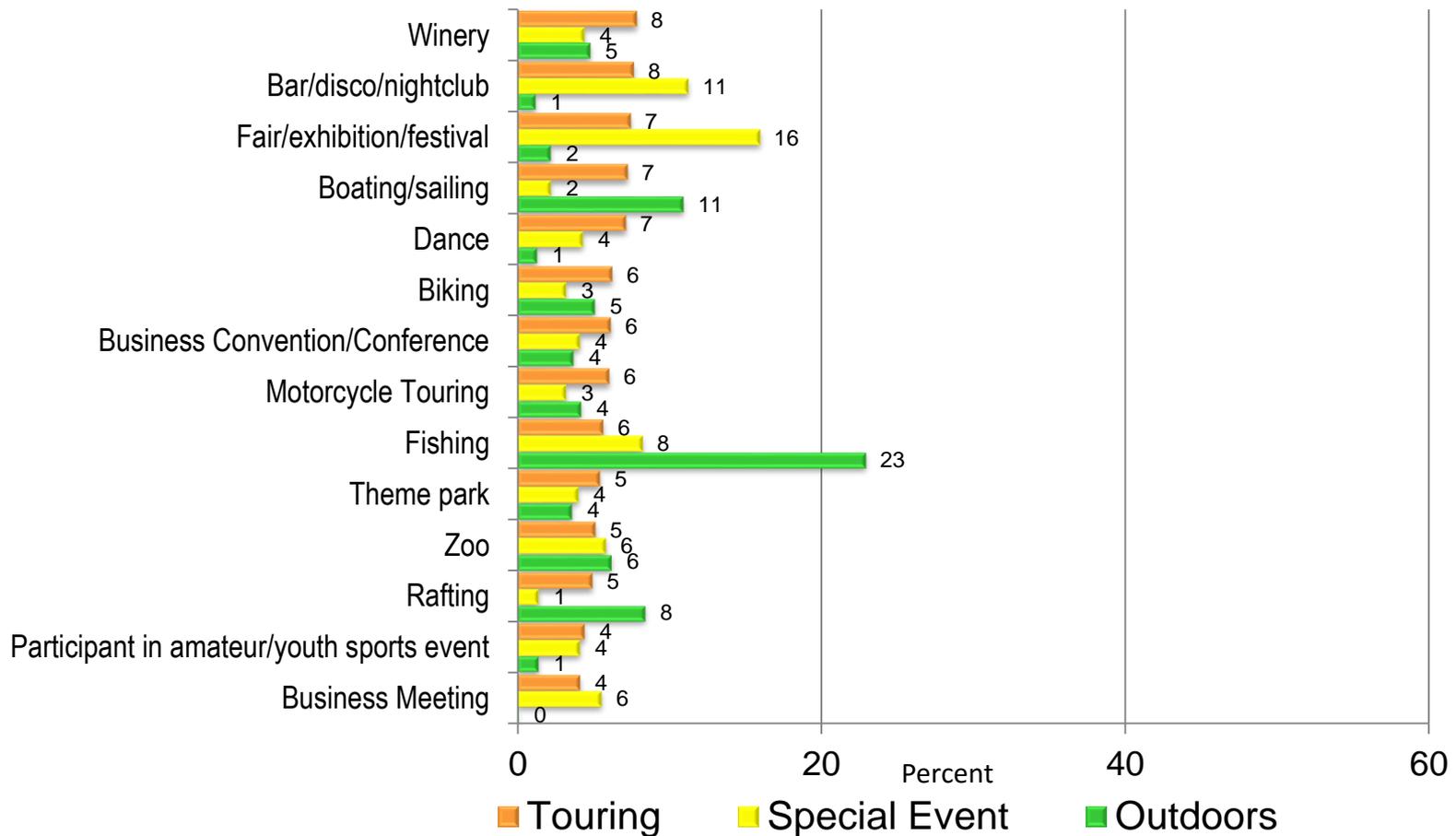
Base: Adult Overnight Trips to Arkansas



Activities and Experiences (Cont'd)



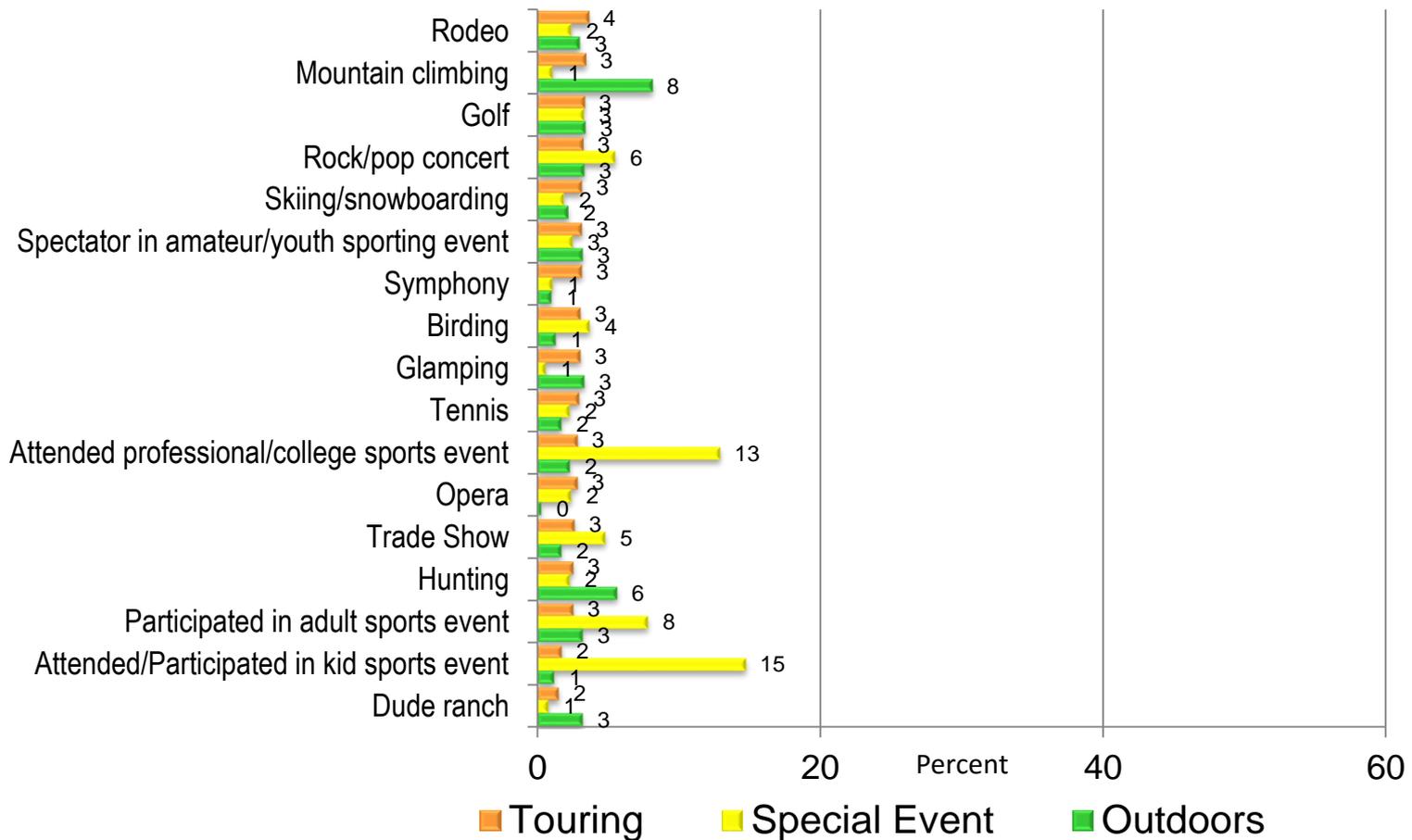
Base: Adult Overnight Trips to Arkansas



Activities and Experiences (Cont'd)



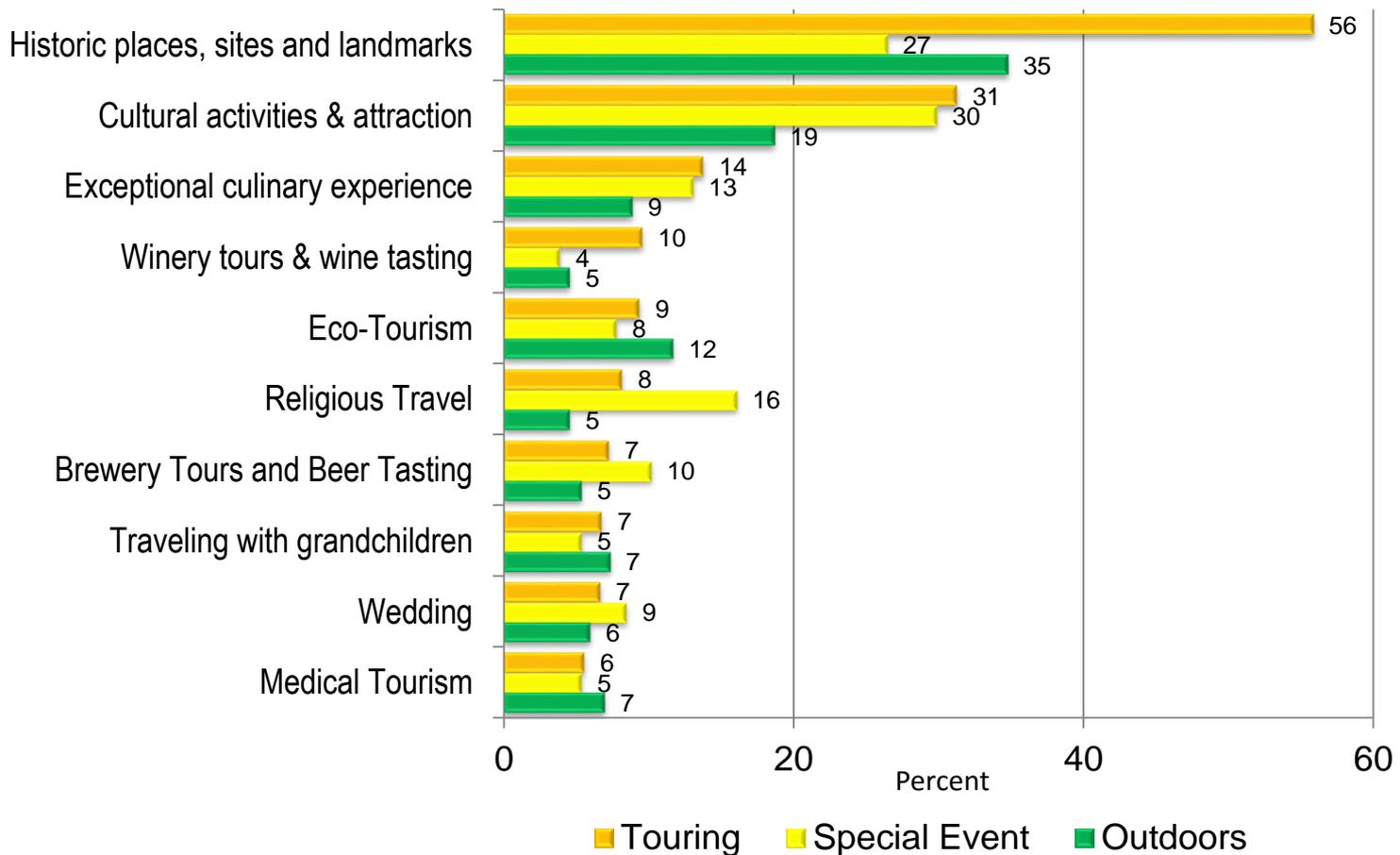
Base: Adult Overnight Trips to Arkansas



Specific Interests on Trip in 2015



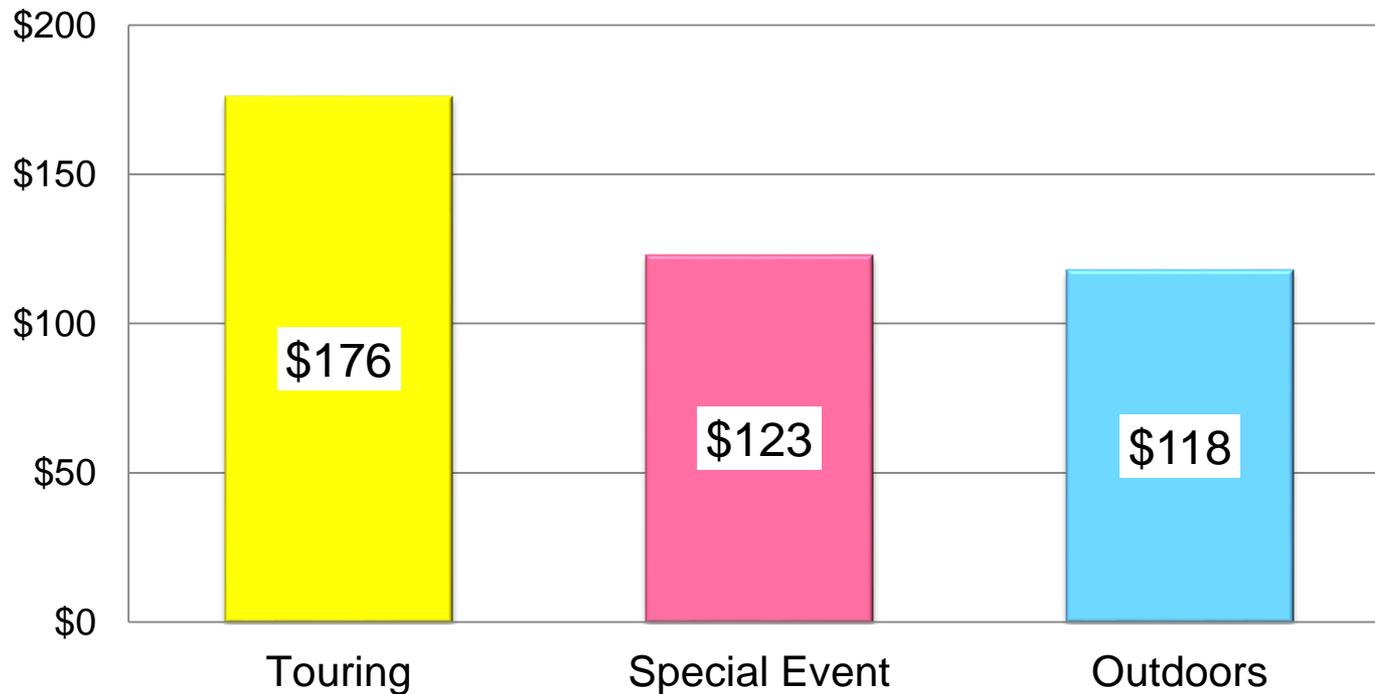
Base: Adult Overnight Trips to Arkansas



Per Person Expenditures in Arkansas by Trip Type



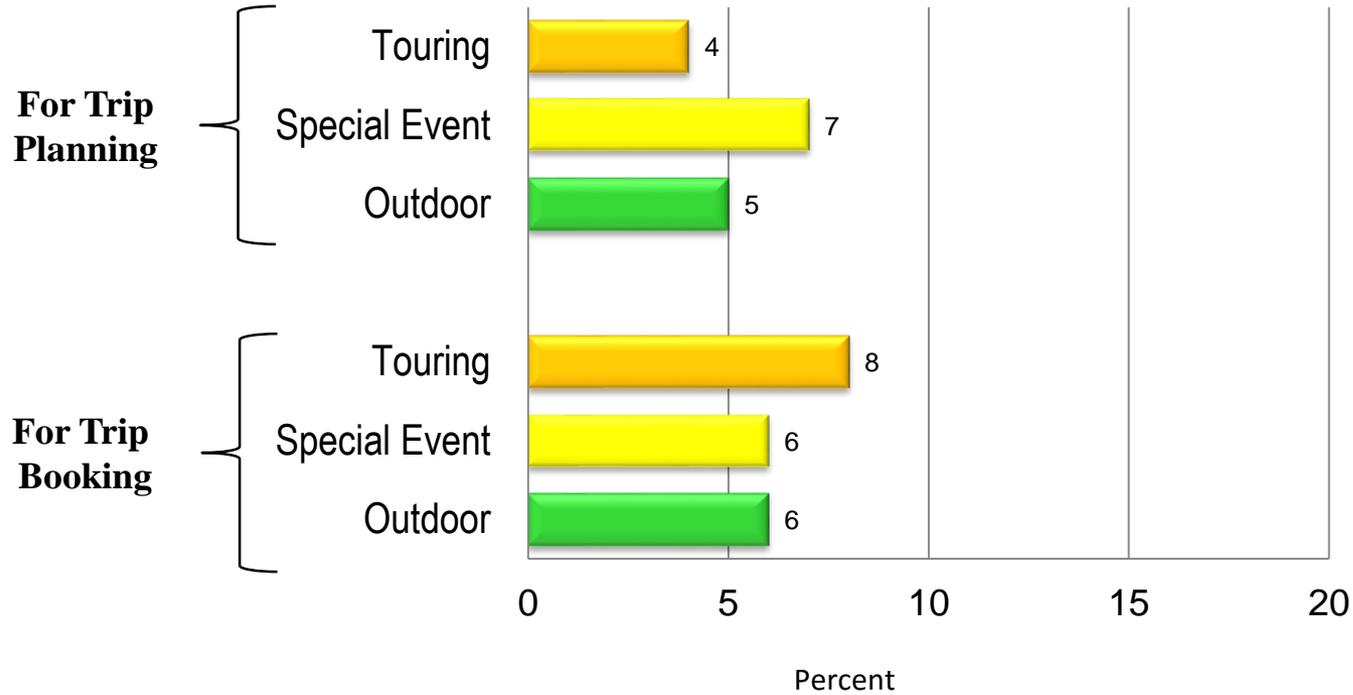
Base: Adult Overnight Trips to Arkansas



Use of Travel Agents



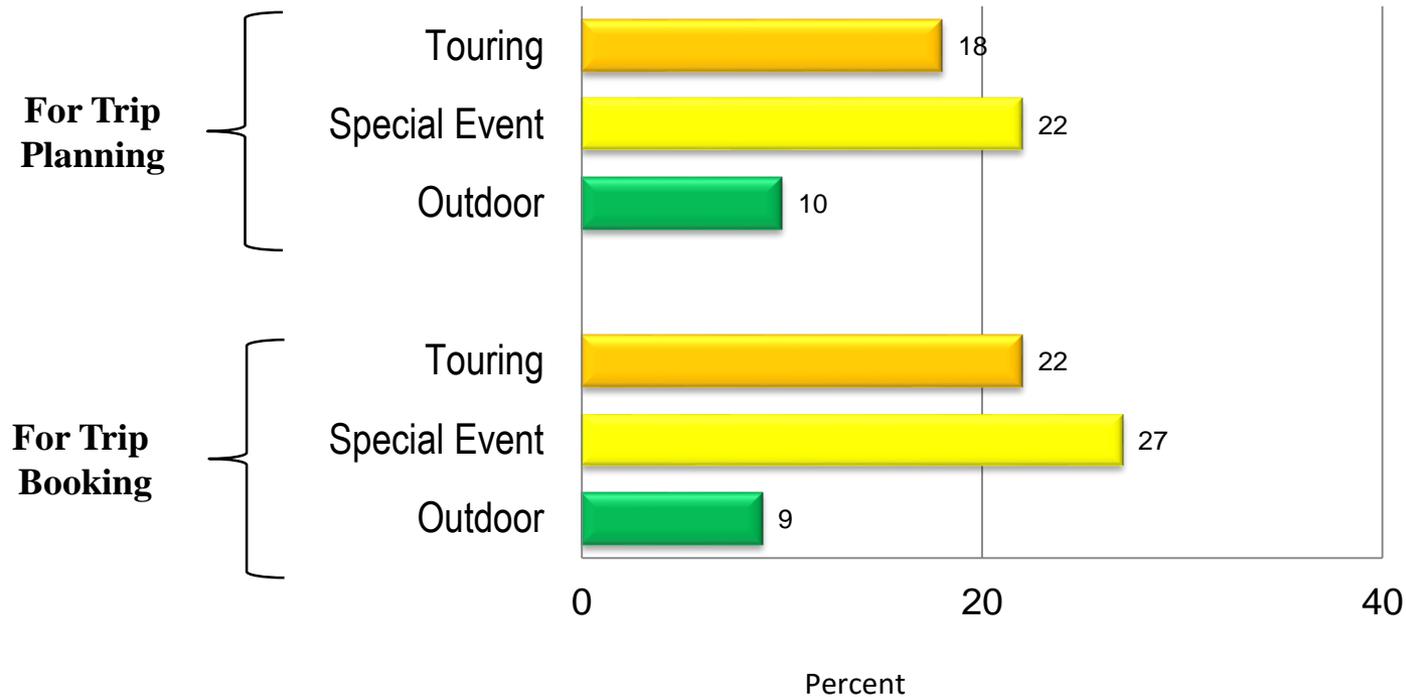
Base: Adult Overnight Trips to Arkansas



Use of Online Travel Agency for Trip Planning & Booking



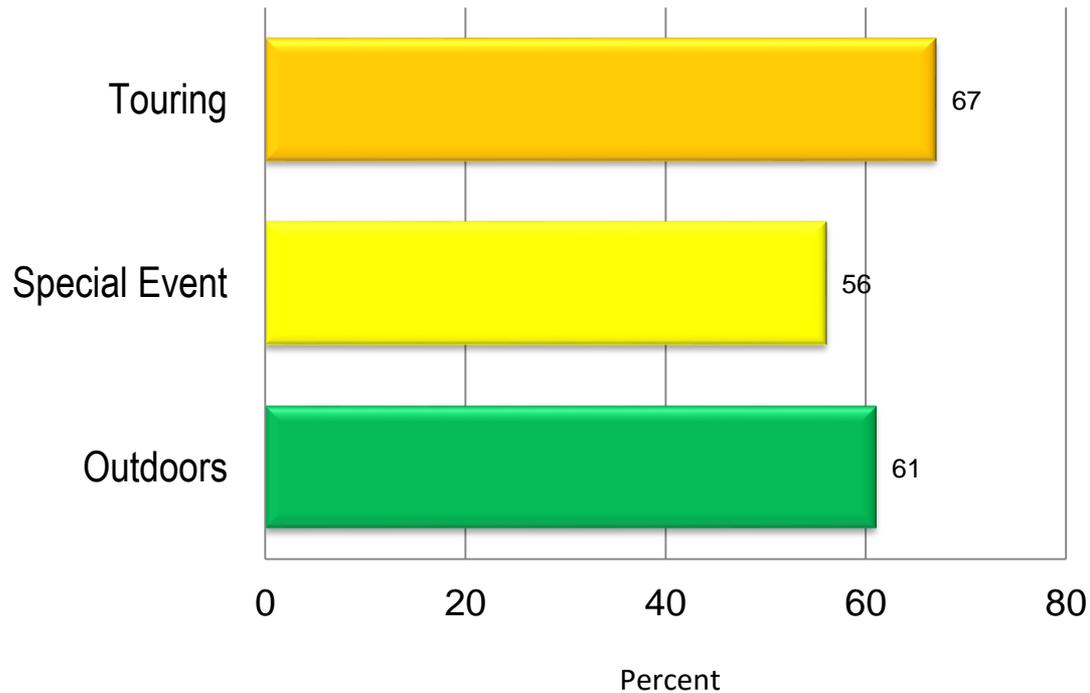
Base: Adult Overnight Trips to Arkansas



Trip Planning Cycle – % Planning 2+ Months in Advance



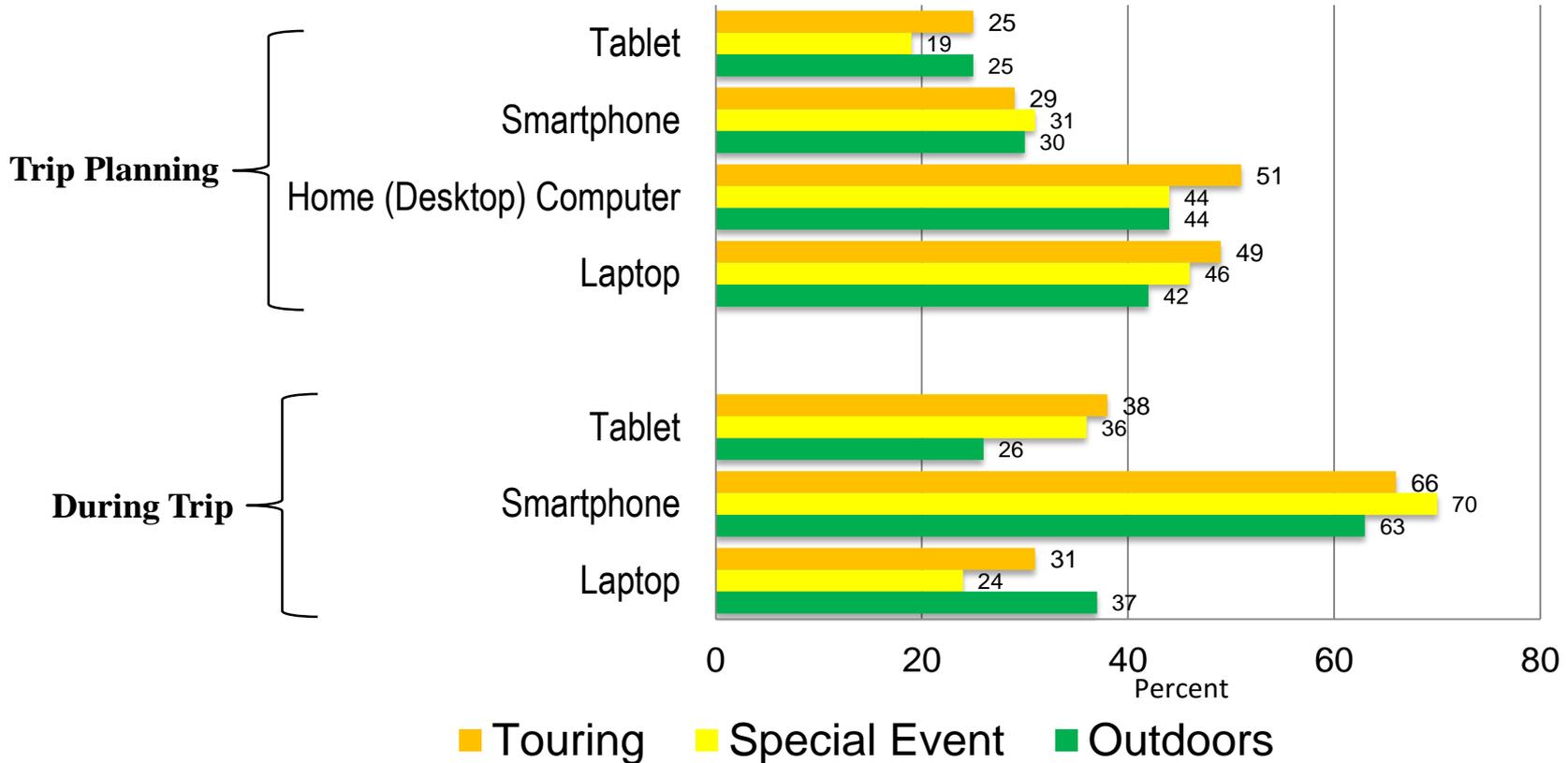
Base: Adult Overnight Trips to Arkansas



Use of Devices for Trip Planning/ During Trip



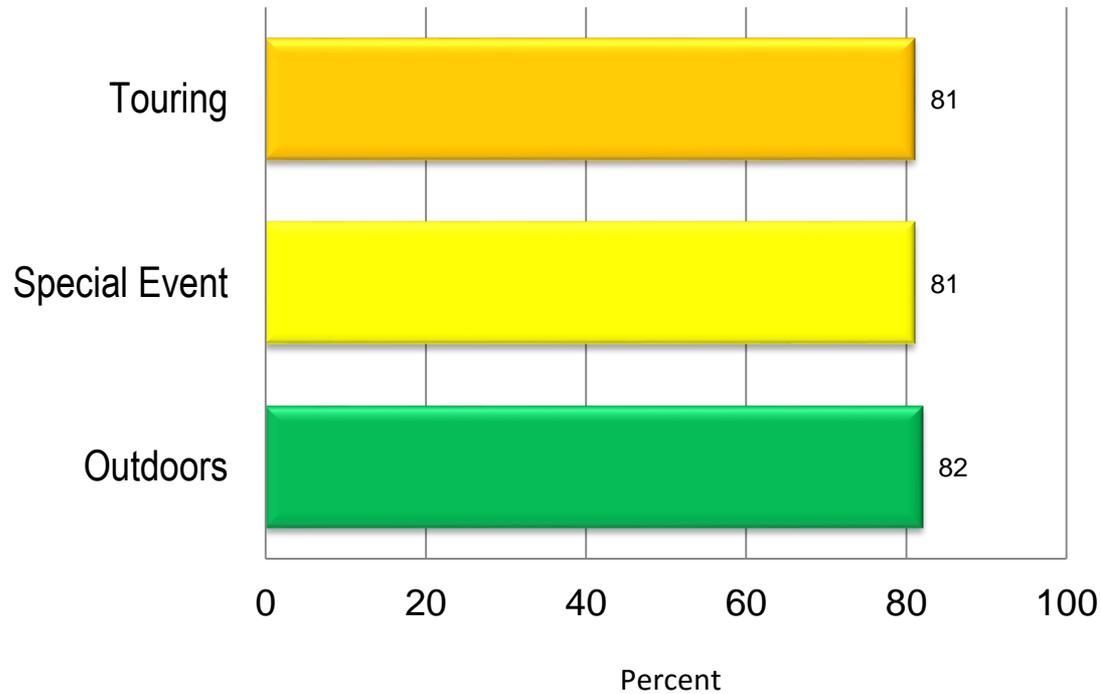
Base: Adult Overnight Trips to Arkansas



Satisfaction With Overall Trip Experience — % Very Satisfied



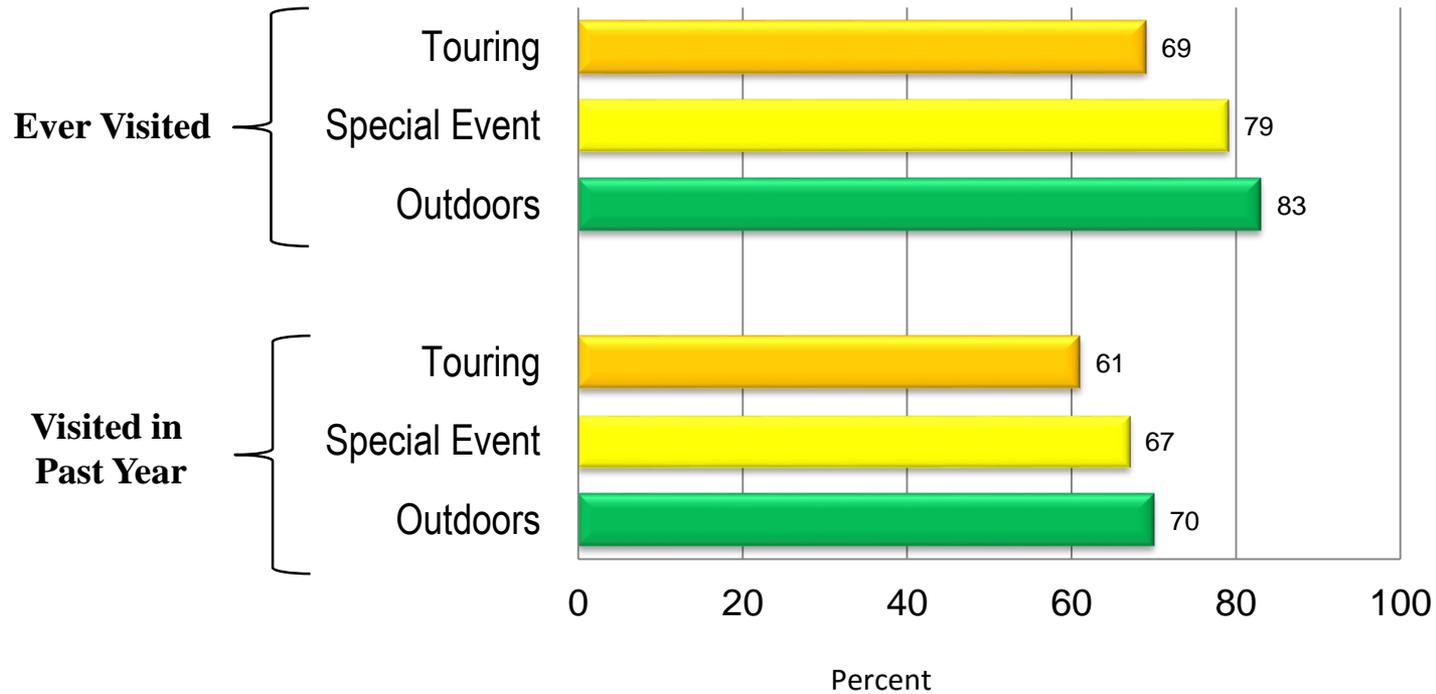
Base: Adult Overnight Trips to Arkansas



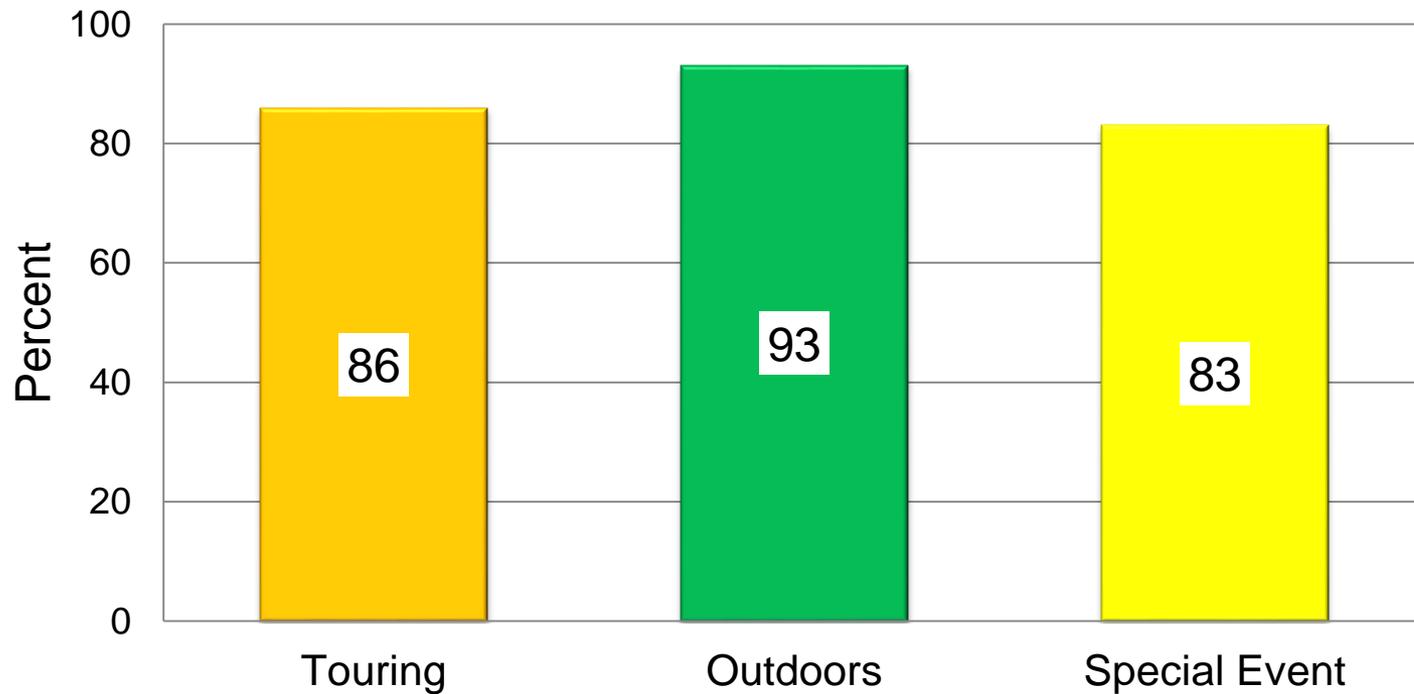
Past Visitation



Base: Adult Overnight Trips to Arkansas



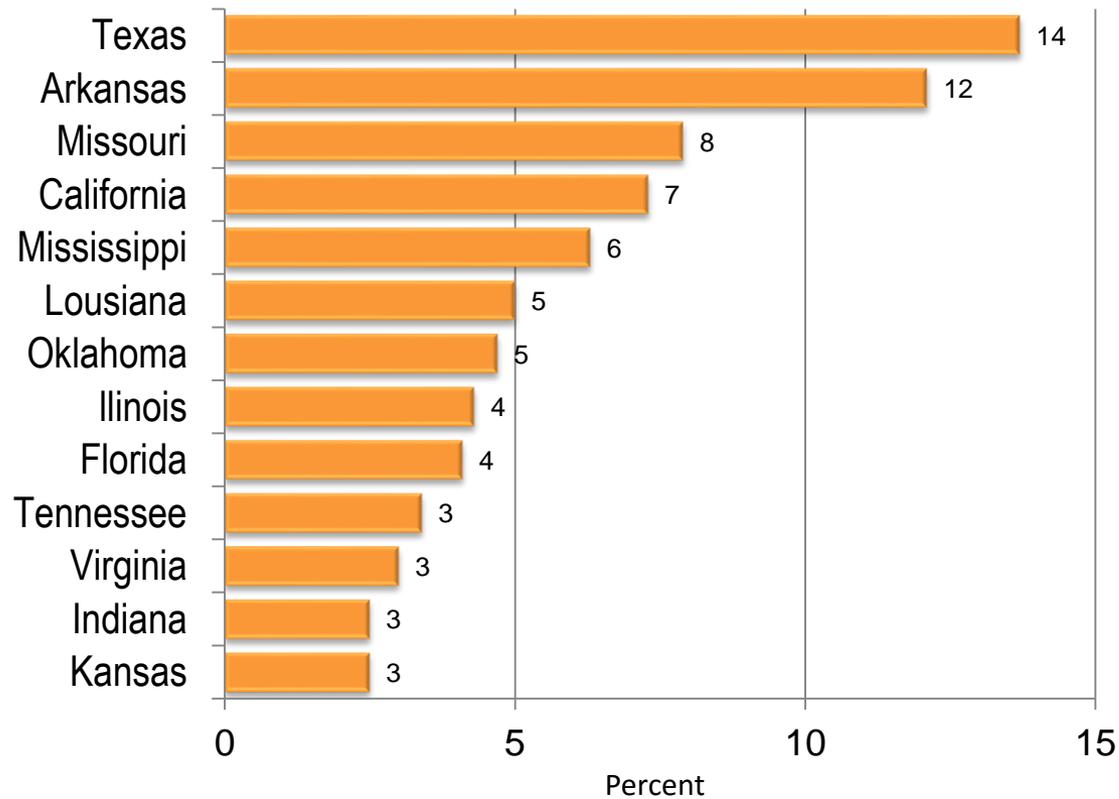
Used Any Social Media in Past Three Months by Trip Type



State Origin of Trip – Touring Trips



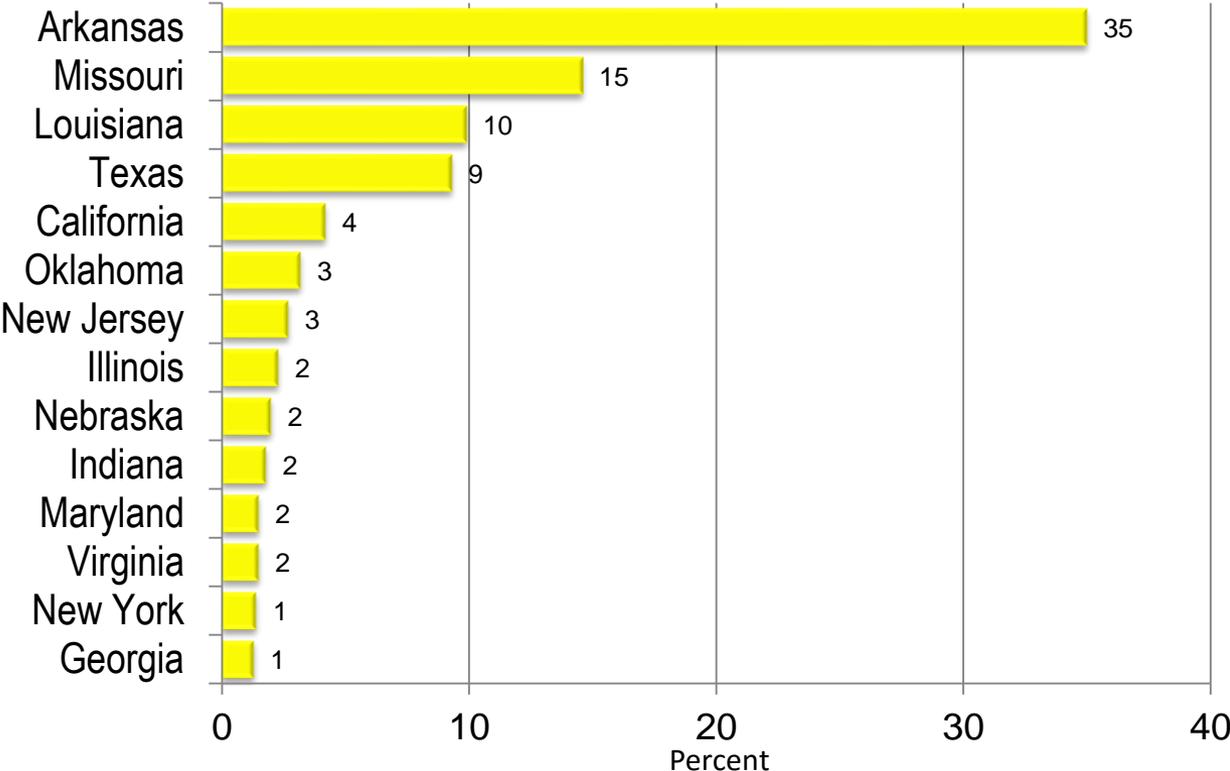
Base: Adult Overnight Touring Trips to Arkansas



State Origin Of Trip – Special Event Trips



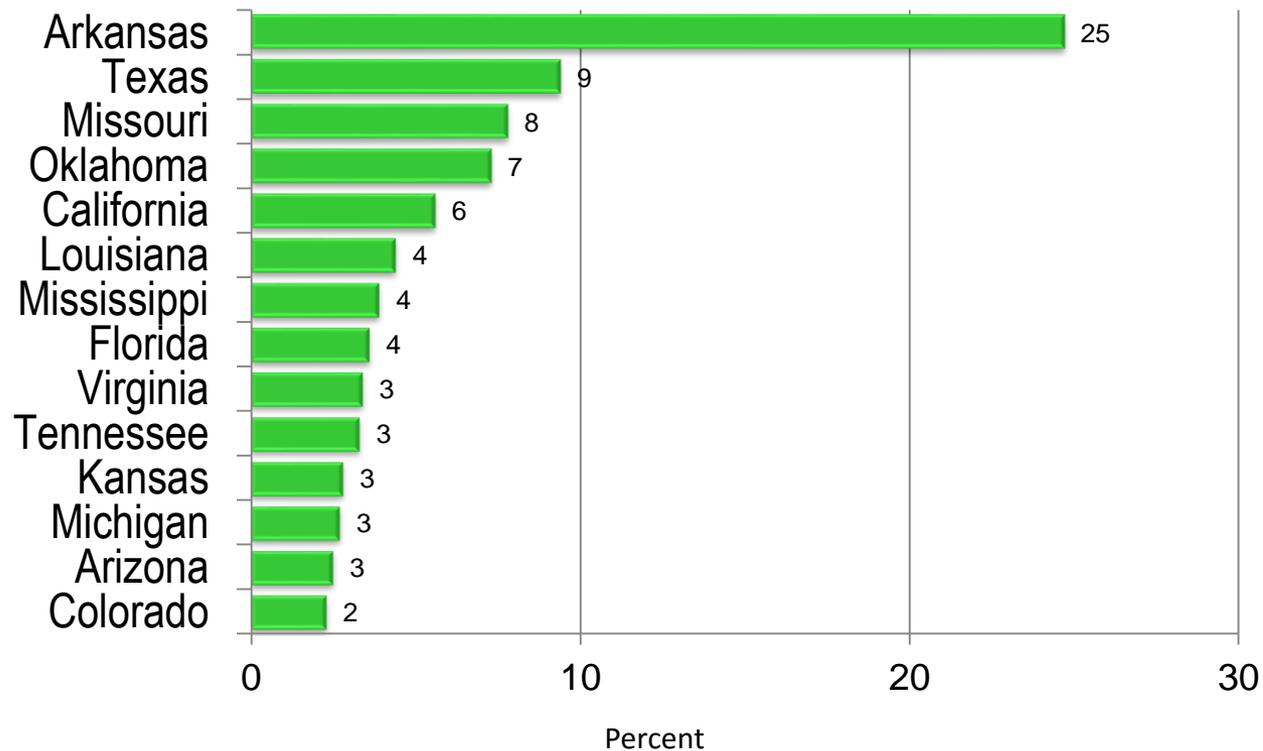
Base: Adult Overnight Special Event Trips to Arkansas



State Origin Of Trip – Outdoors Trips



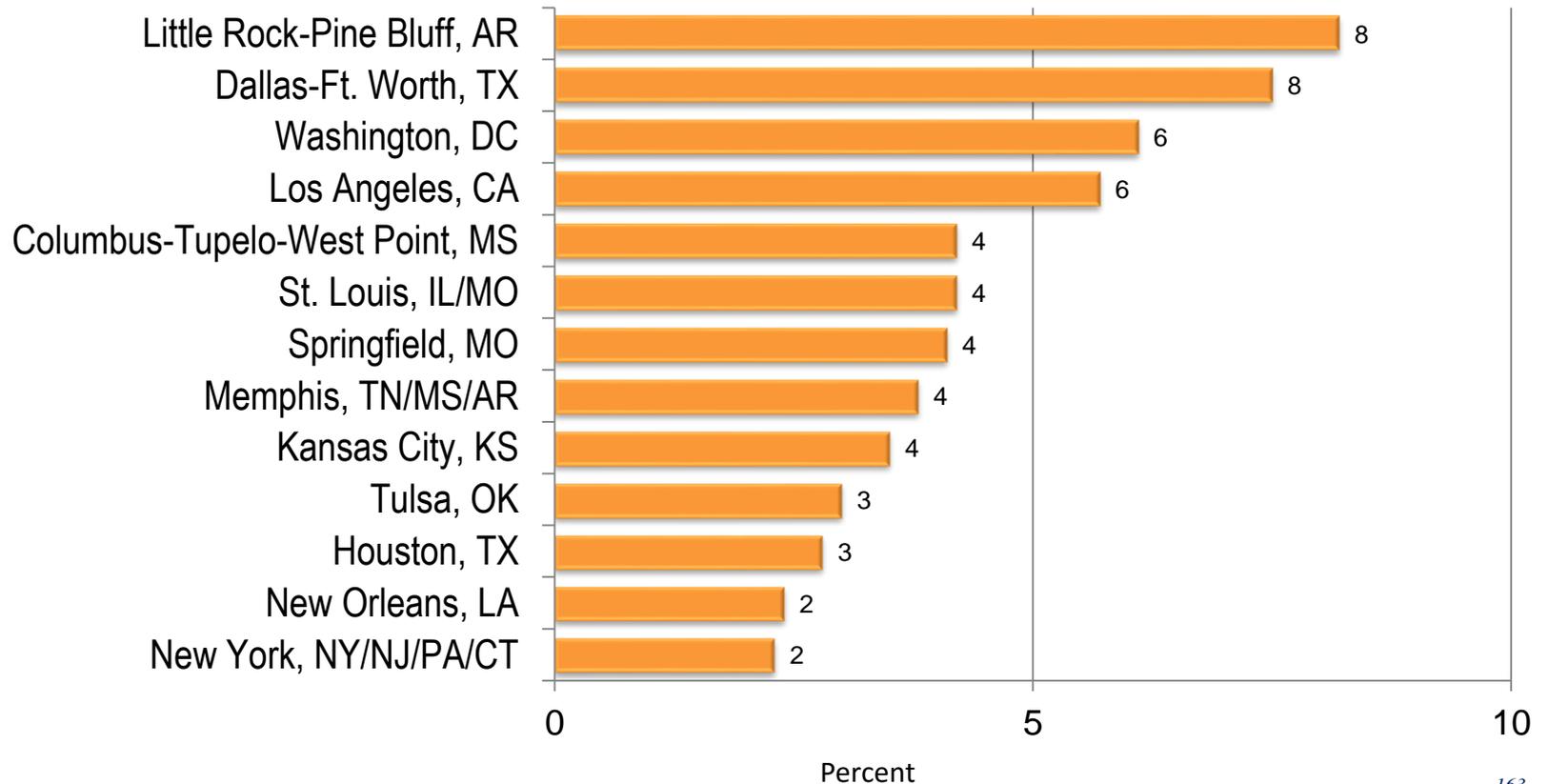
Base: Adult Overnight Outdoor Trips to Arkansas



DMA Origin Of Trip – Touring Trips



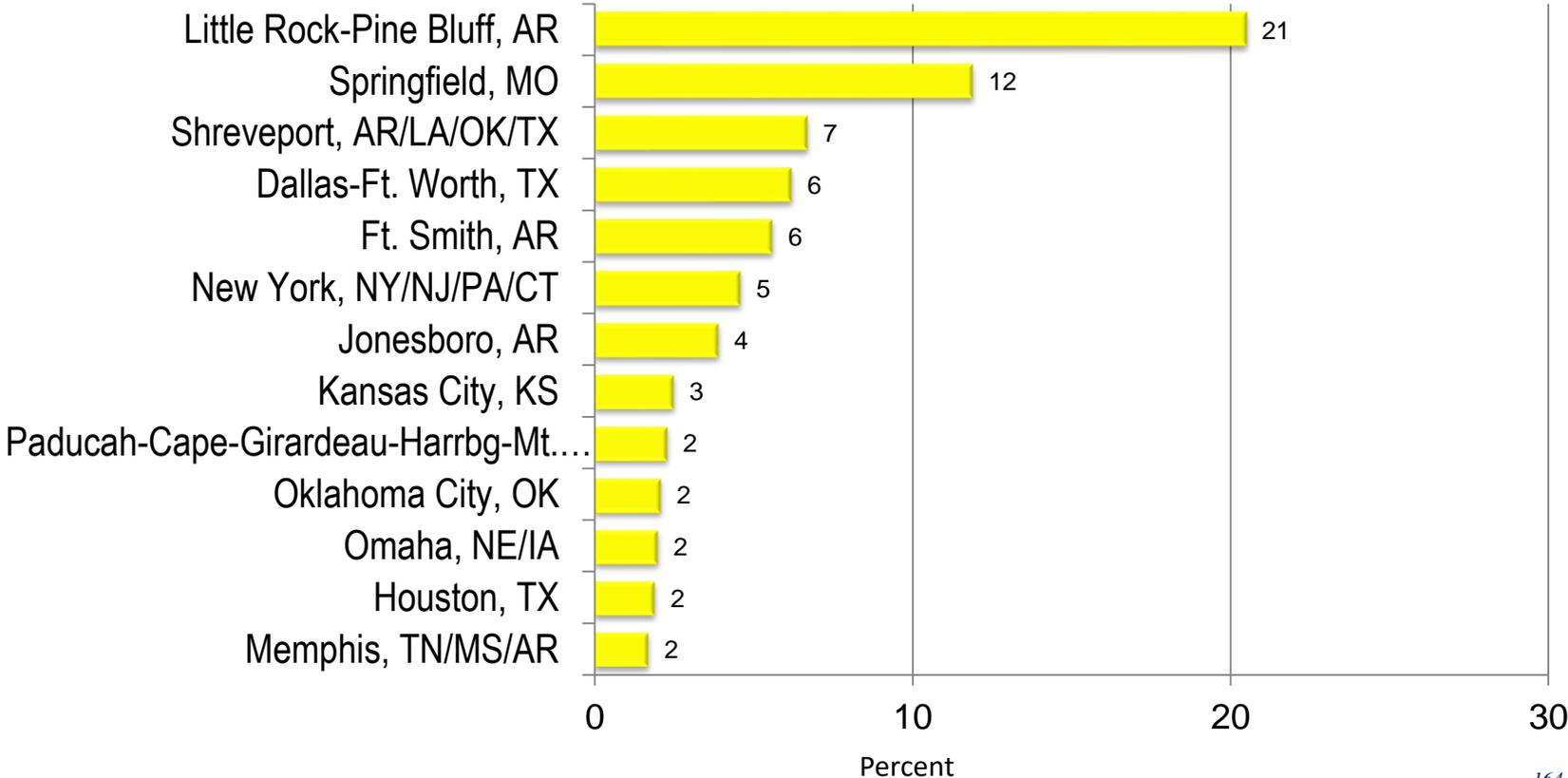
Base: Adult Overnight Touring Trips to Arkansas



DMA Origin Of Trip – Special Event Trips



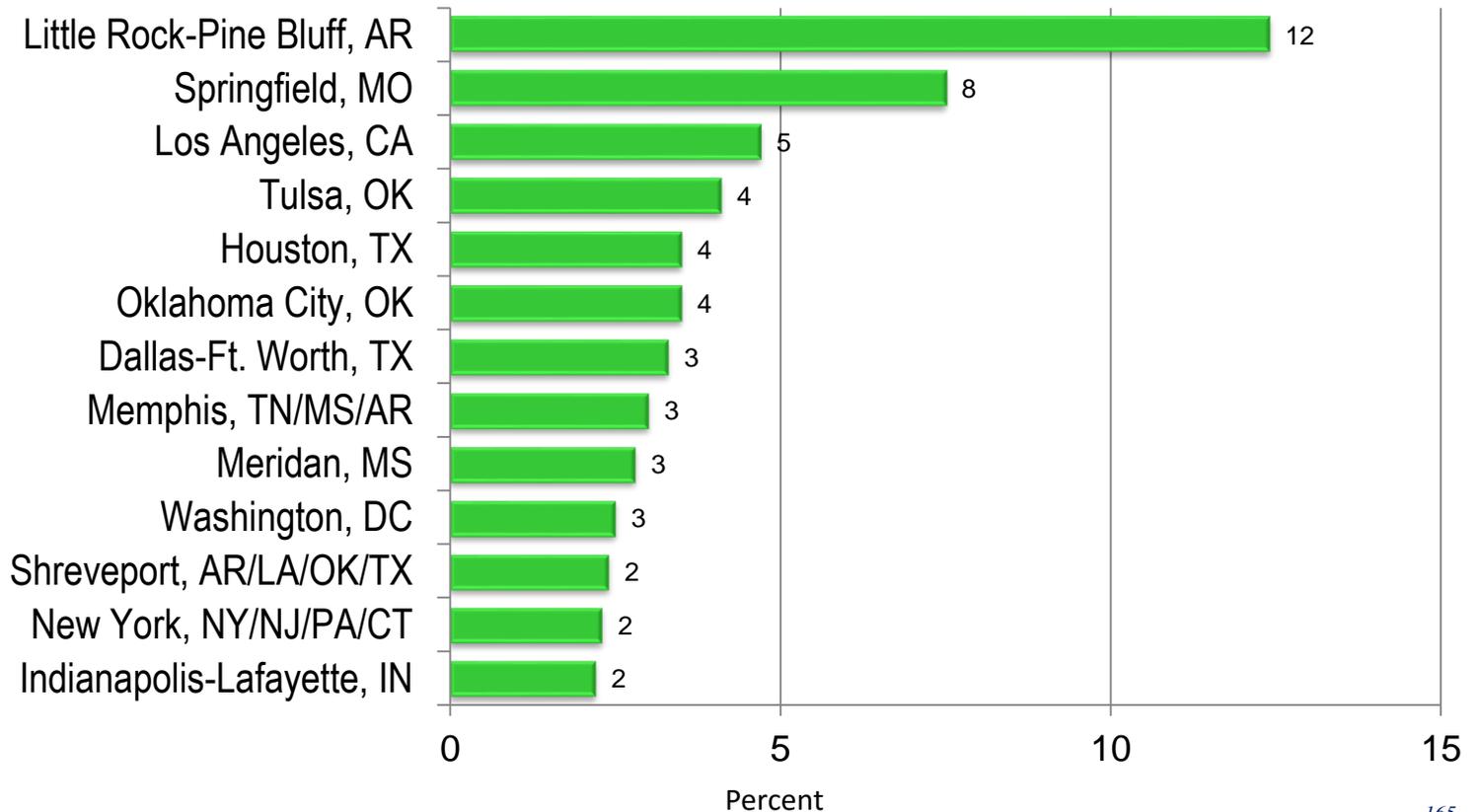
Base: Adult Overnight Special Event Trips to Arkansas



DMA Origin Of Trip – Outdoors Trips



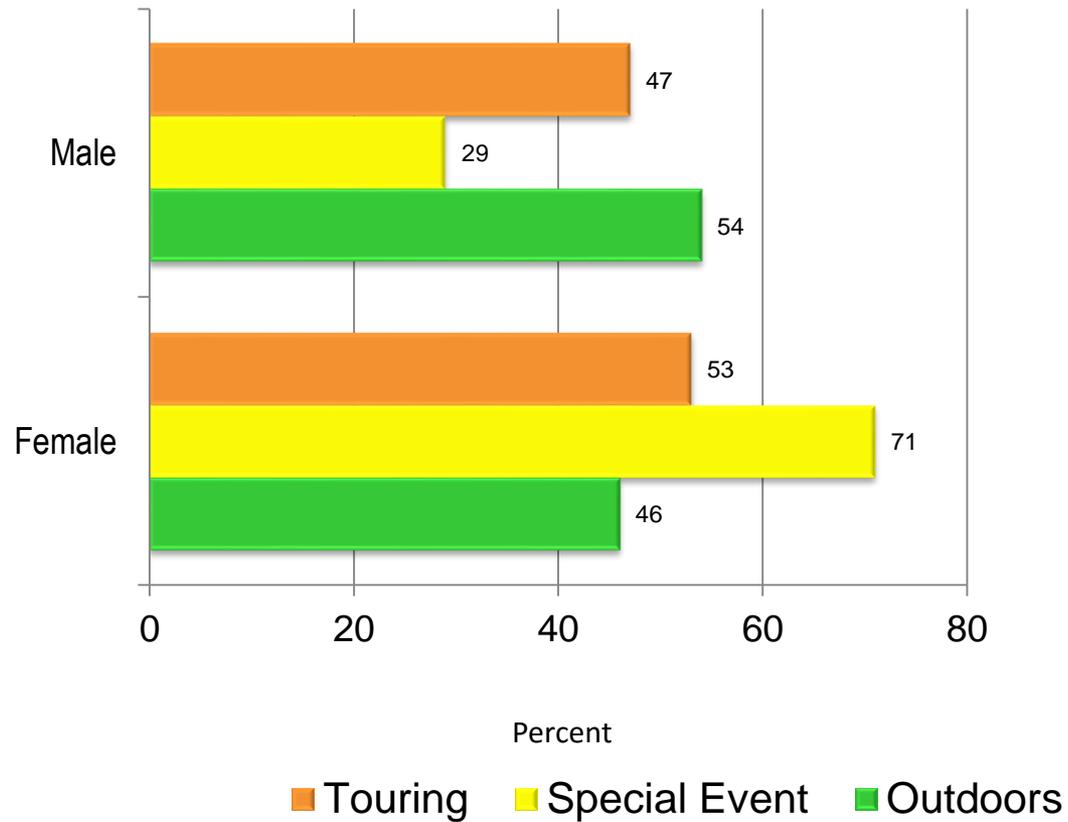
Base: Adult Overnight Outdoor Trips to Arkansas



Gender



Base: Adult Overnight Trips to Arkansas



Age

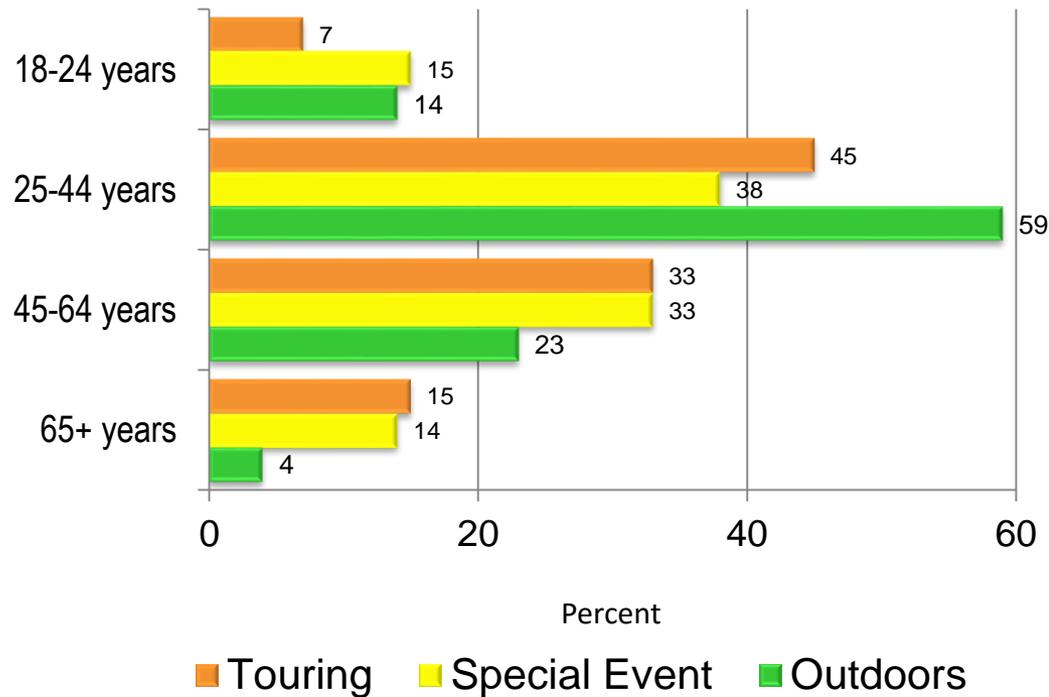


Base: Adult Overnight Trips to Arkansas

Touring Average
= 45.5

Special Event Average
= 43.3

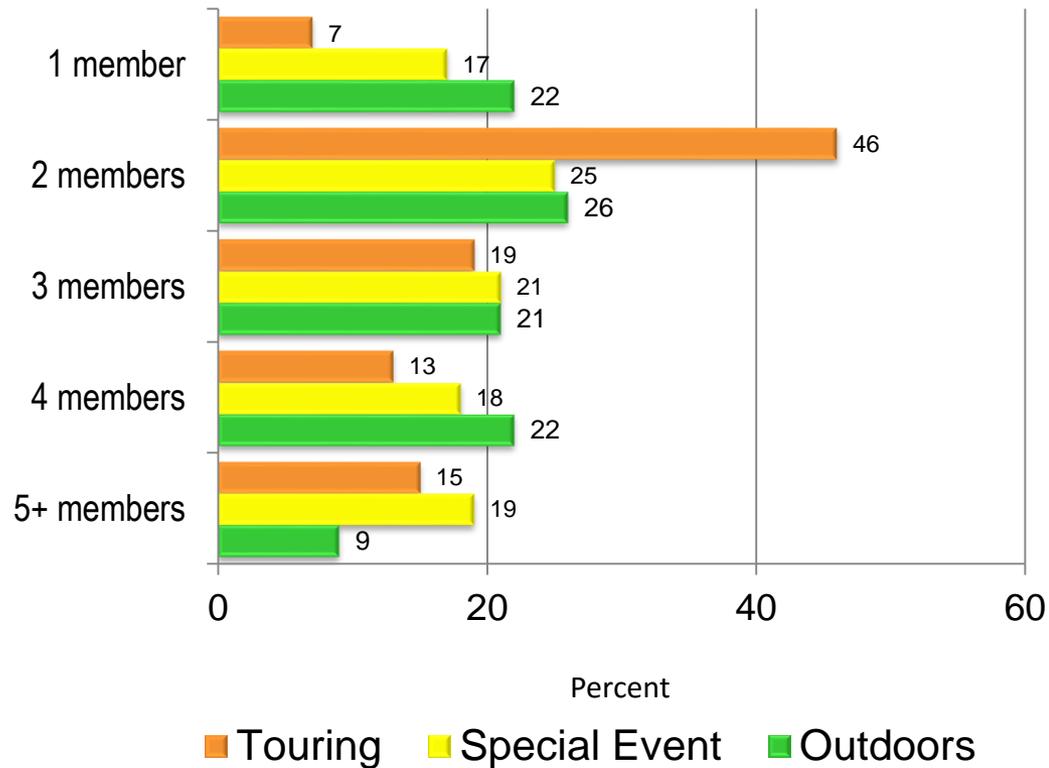
Outdoors Average
= 39.1



Household Size



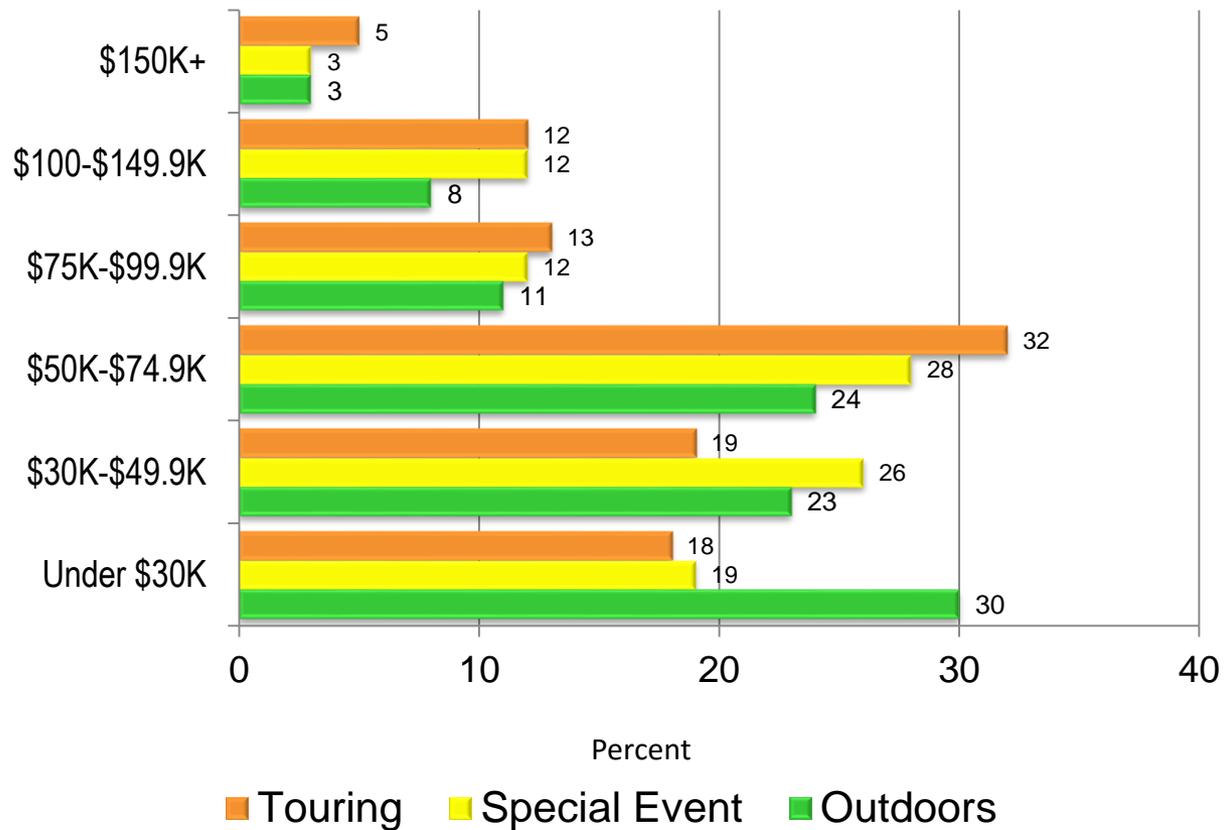
Base: Adult Overnight Trips to Arkansas



Household Income



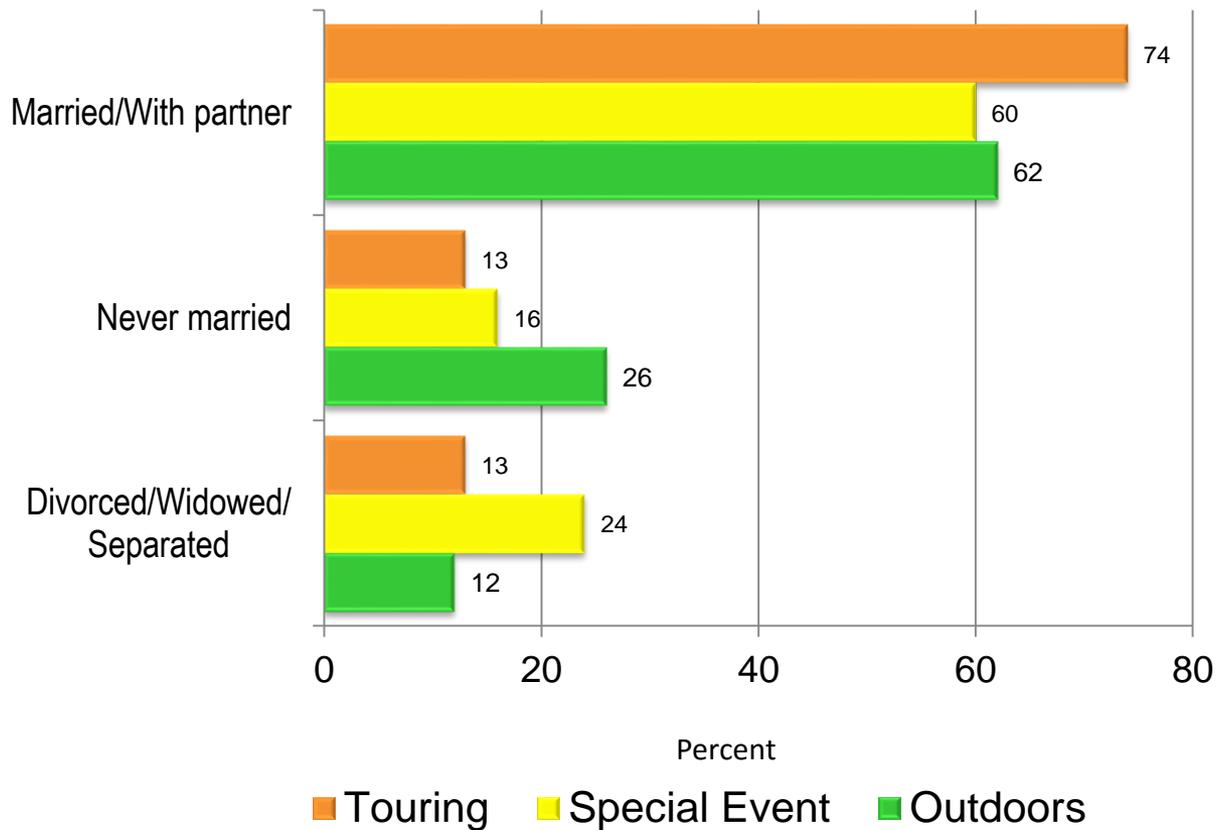
Base: Adult Overnight Trips to Arkansas



Marital Status



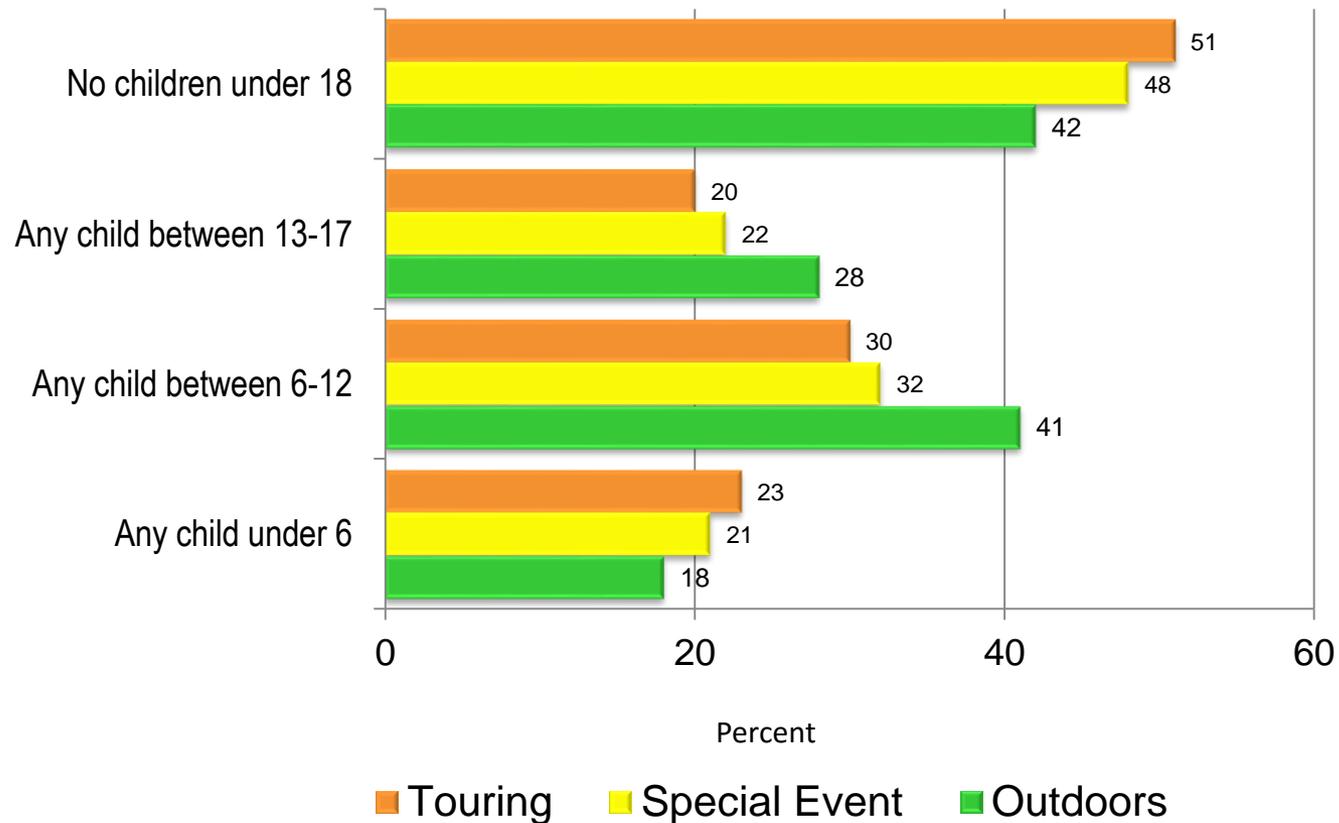
Base: Adult Overnight Trips to Arkansas



Children in Household



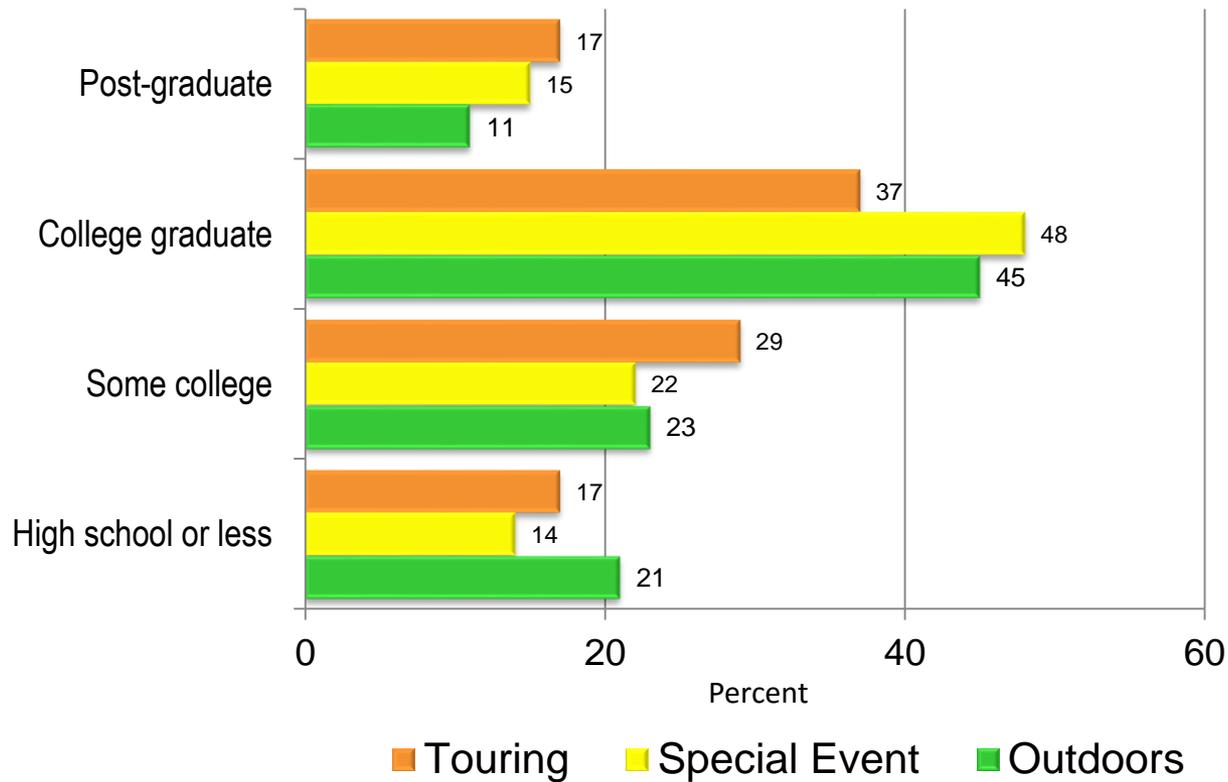
Base: Adult Overnight Trips to Arkansas



Education



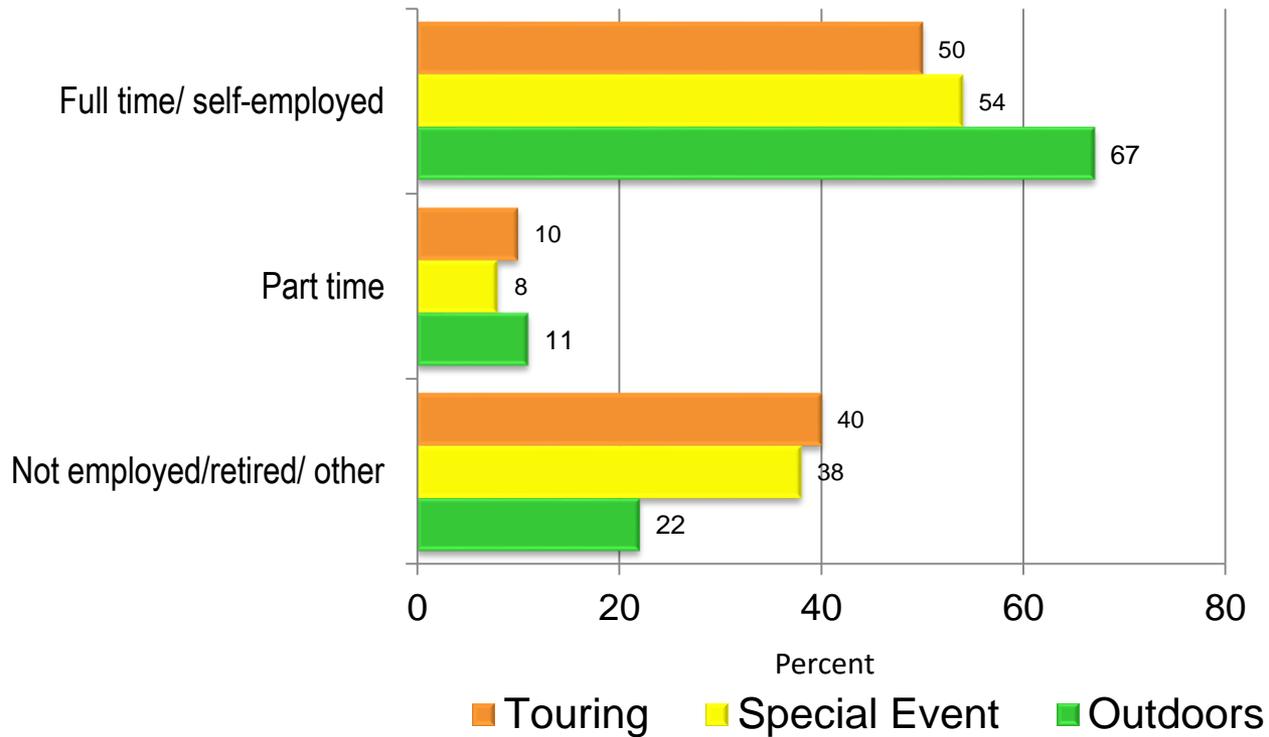
Base: Adult Overnight Trips to Arkansas



Employment



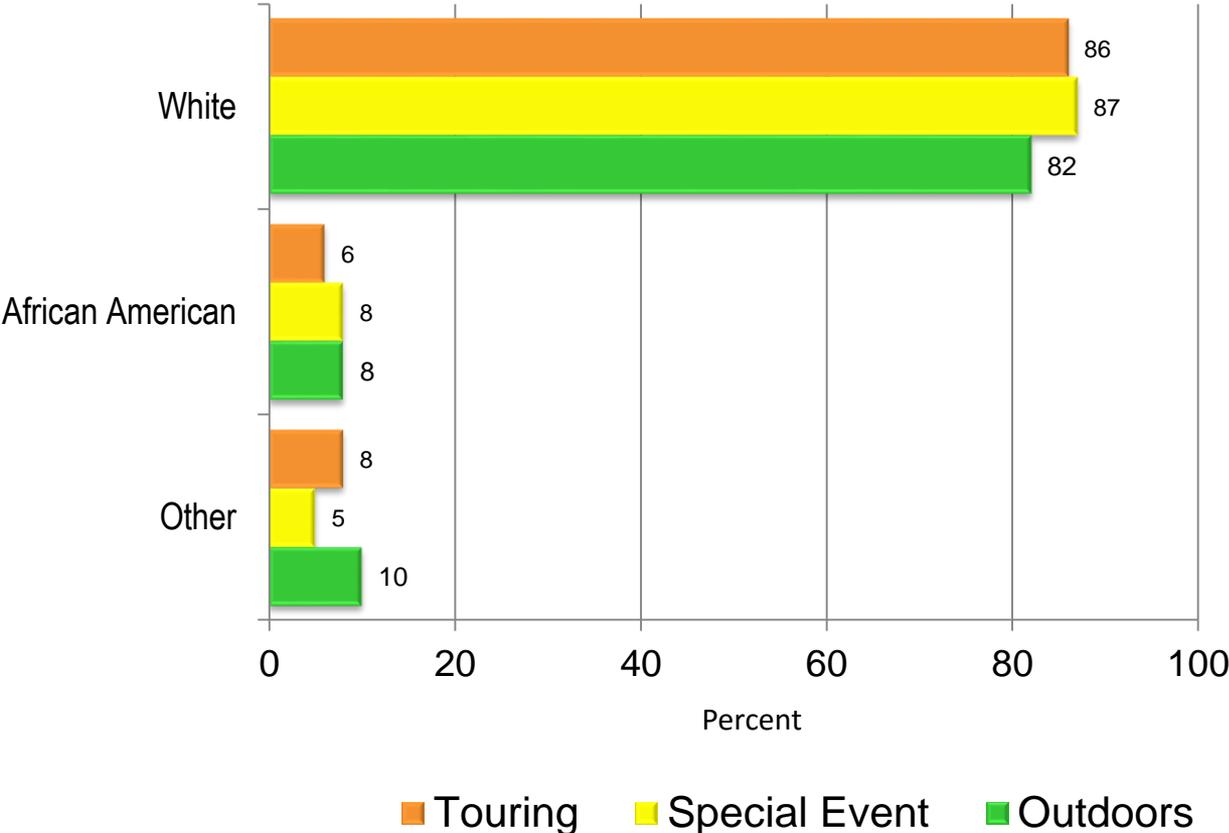
Base: Adult Overnight Trips to Arkansas



Race



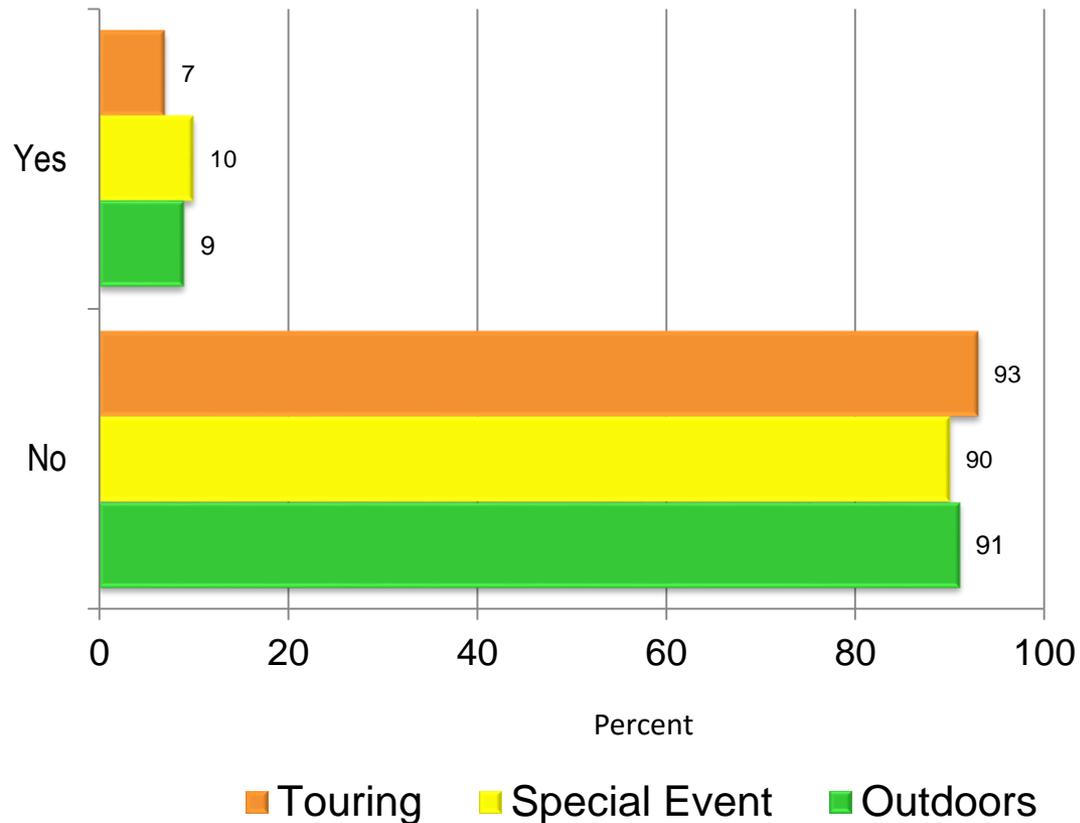
Base: Adult Overnight Trips to Arkansas



Hispanic Background



Base: Adult Overnight Trips to Arkansas





Day Trips to Arkansas

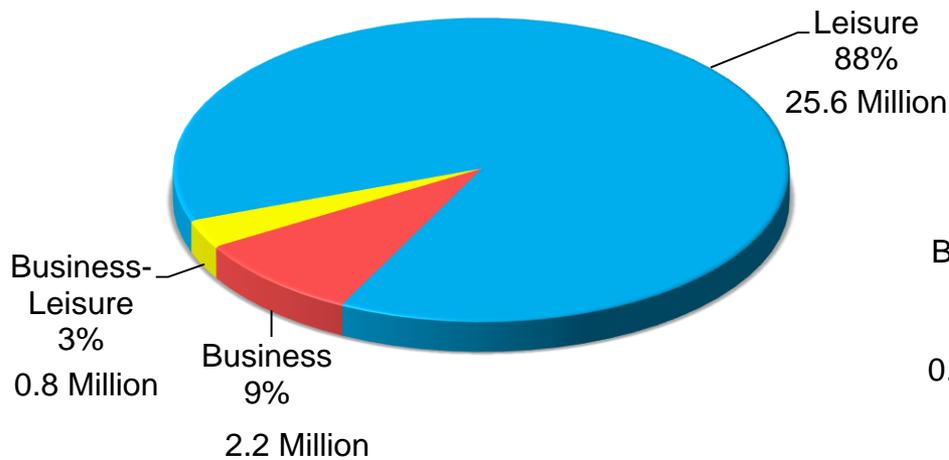


Day Trip Volume & Expenditure Estimates

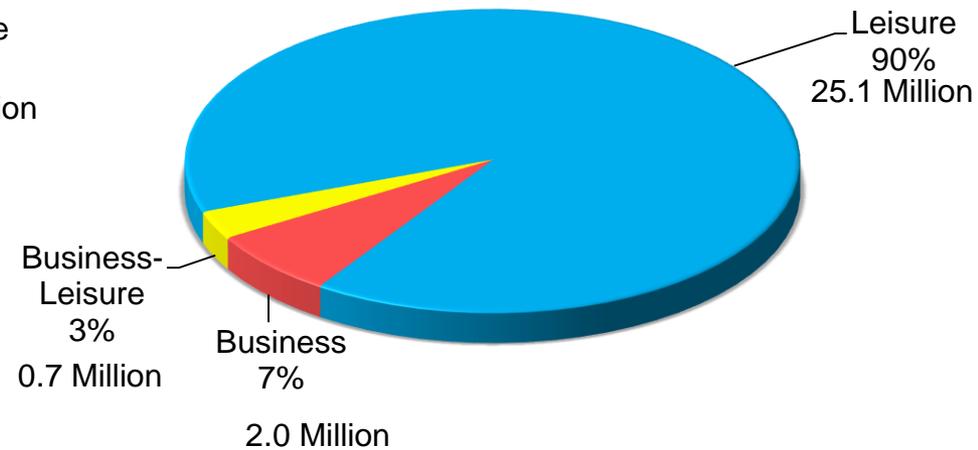
Size of Arkansas's Day Travel Market



**Total 2014 Day Trips
= 28.6 Million**



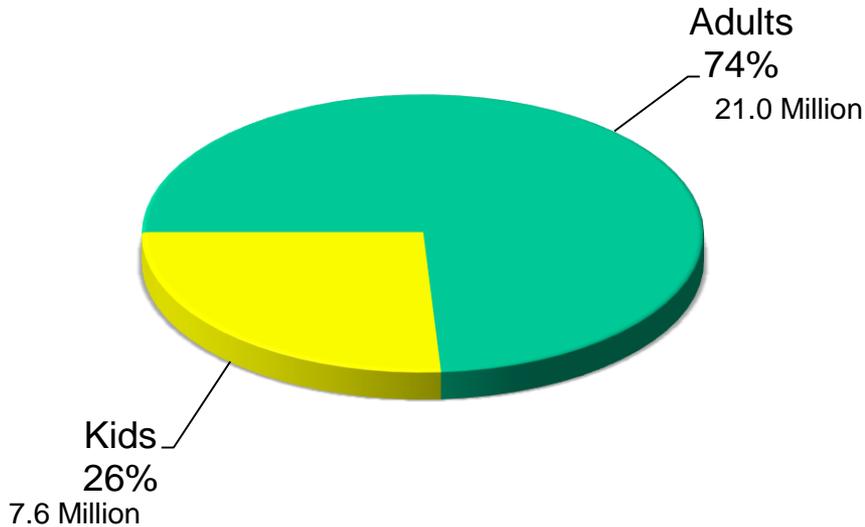
**Total 2015 Day Trips
= 27.8 Million**



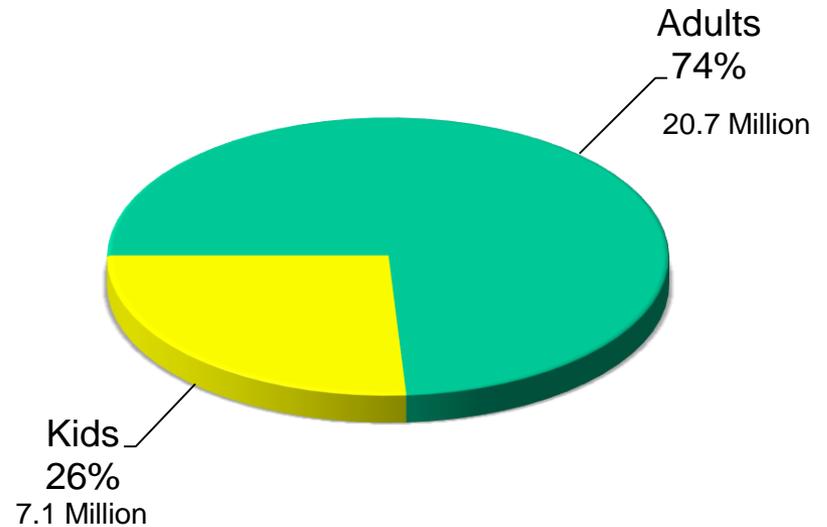
Size of Arkansas's Day Travel Market



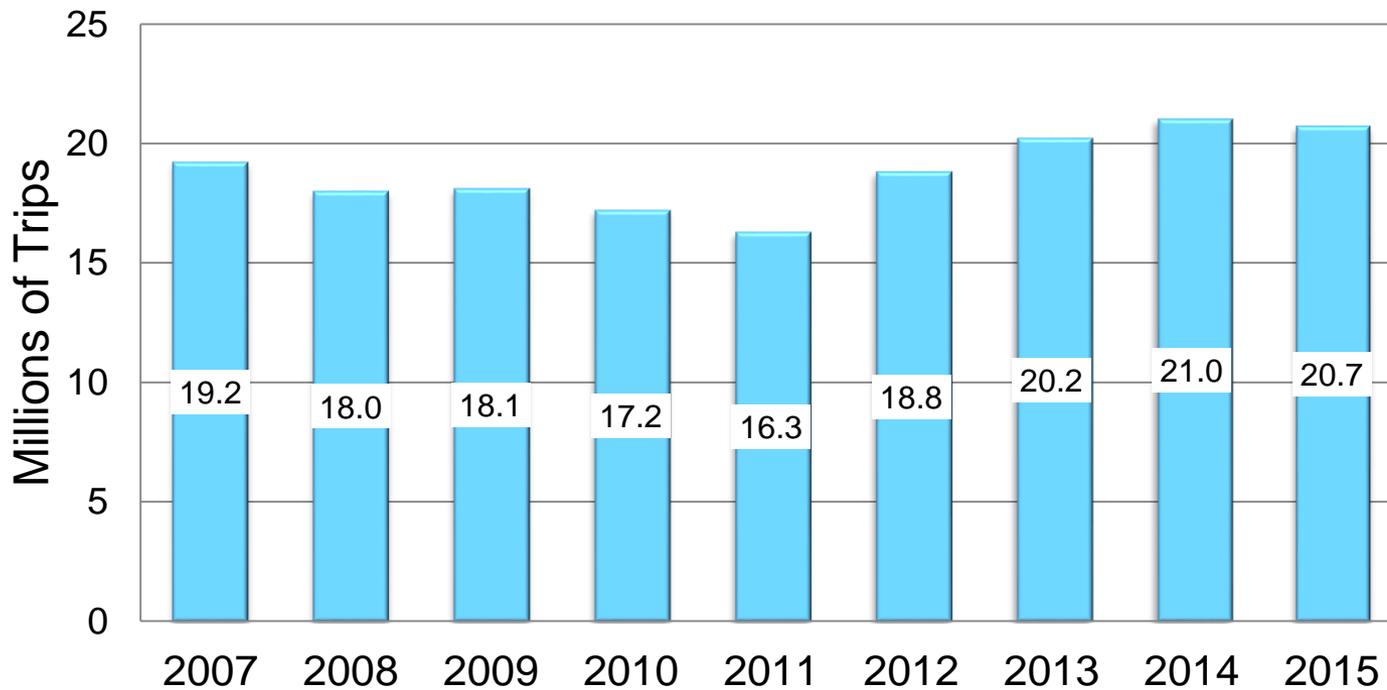
**Total 2014 Day Trips
= 28.6 Million**



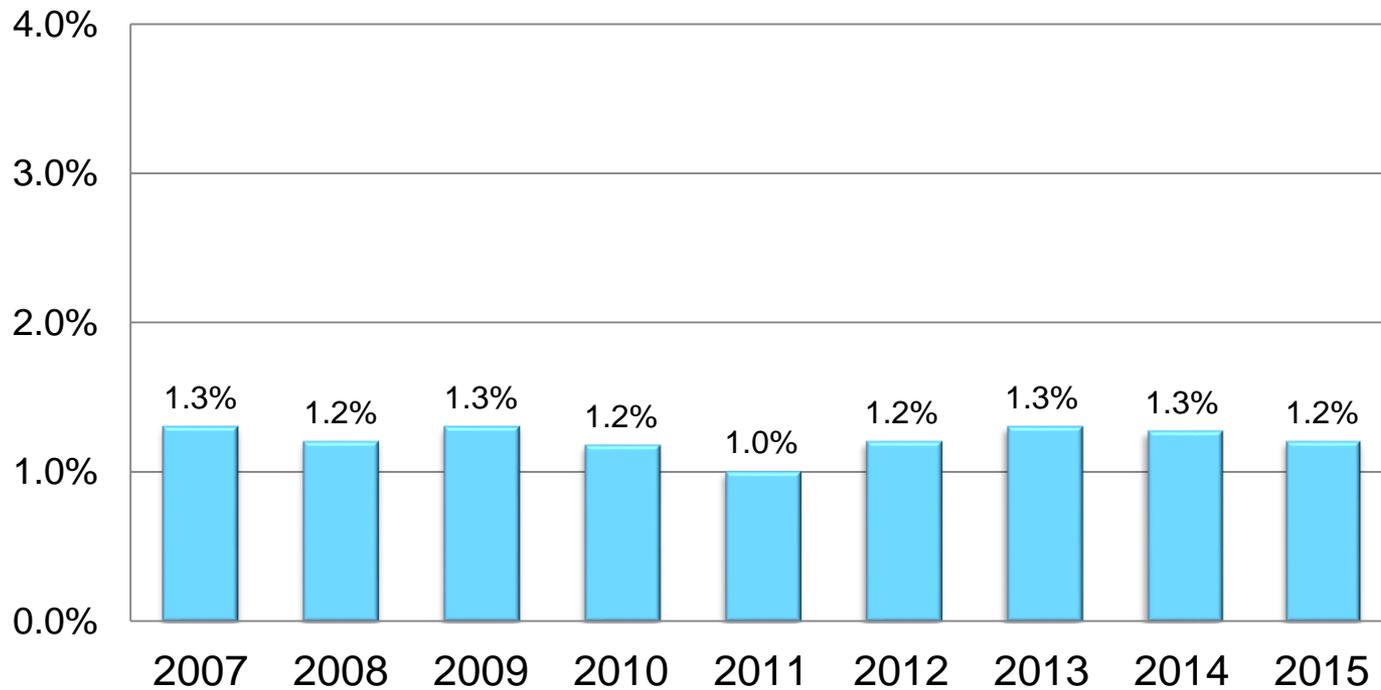
**Total 2015 Day Trips
= 27.8 Million**



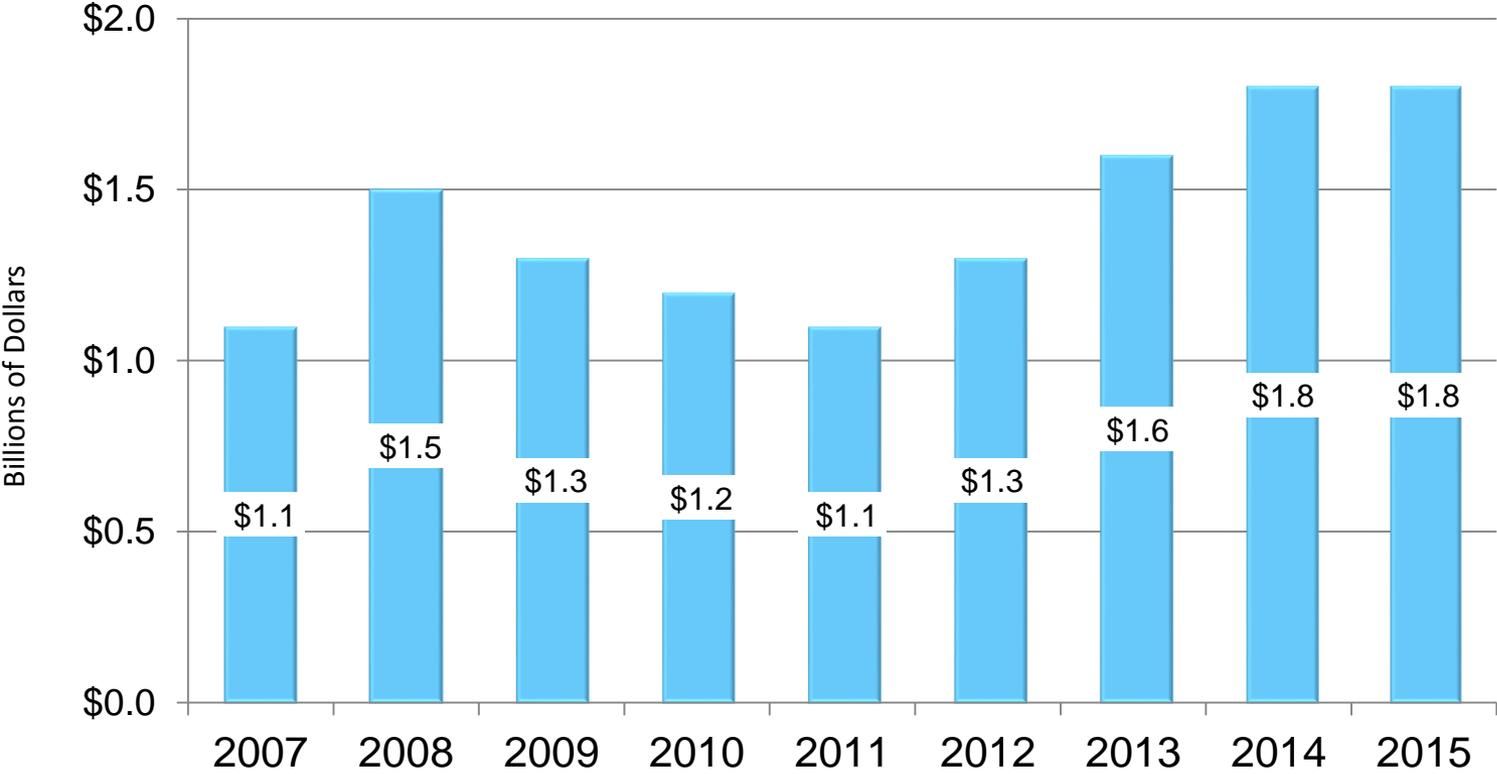
Size of Arkansas's Day Travel Market – Adult Person Trips



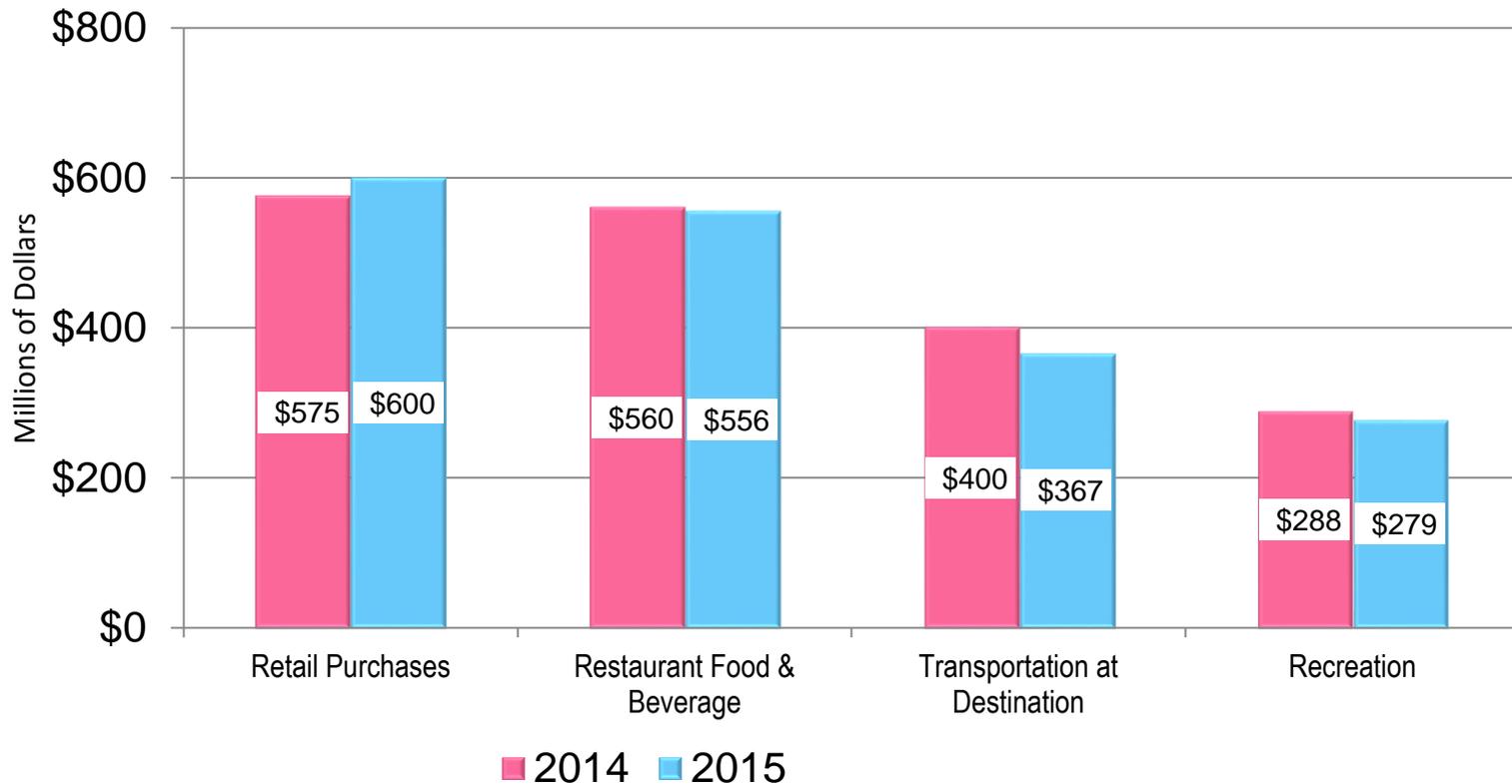
Arkansas's Share of Domestic Day Trips



Total Spending on Day Trips to Arkansas



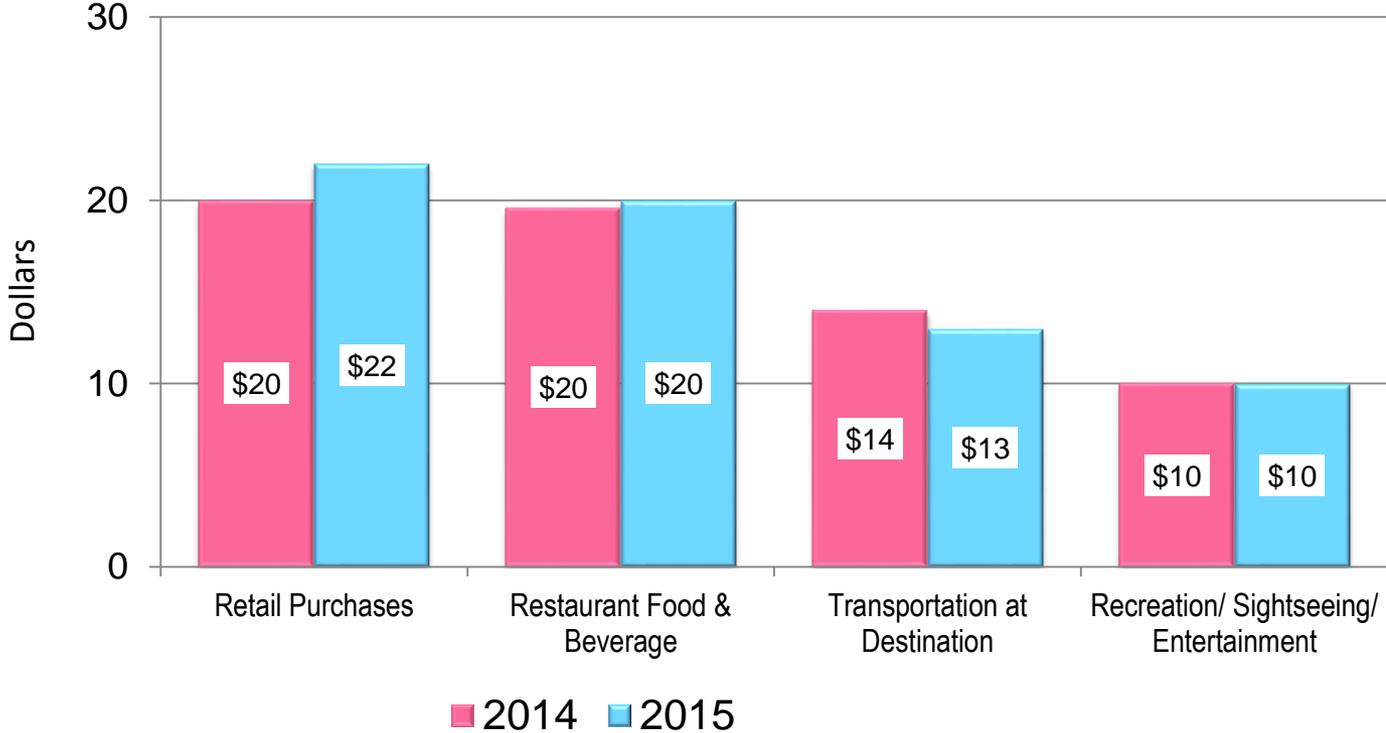
Spending on Day Trips to Arkansas — By Sector



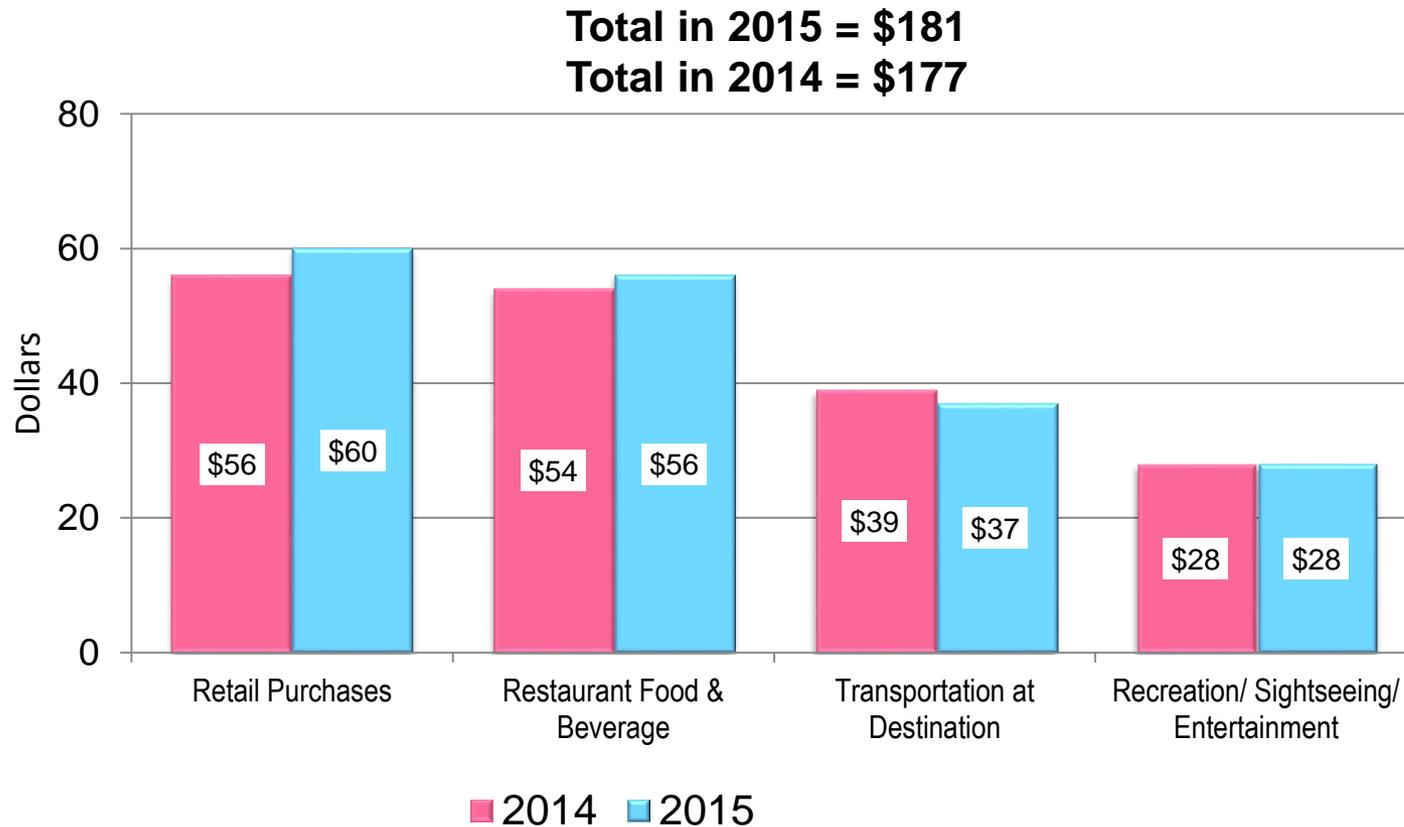
Average Per Person Expenditures on Day Trips — By Sector



Total in 2015 = \$65
Total in 2014 = \$64



Average Per Party Expenditures on Day Trips — By Sector



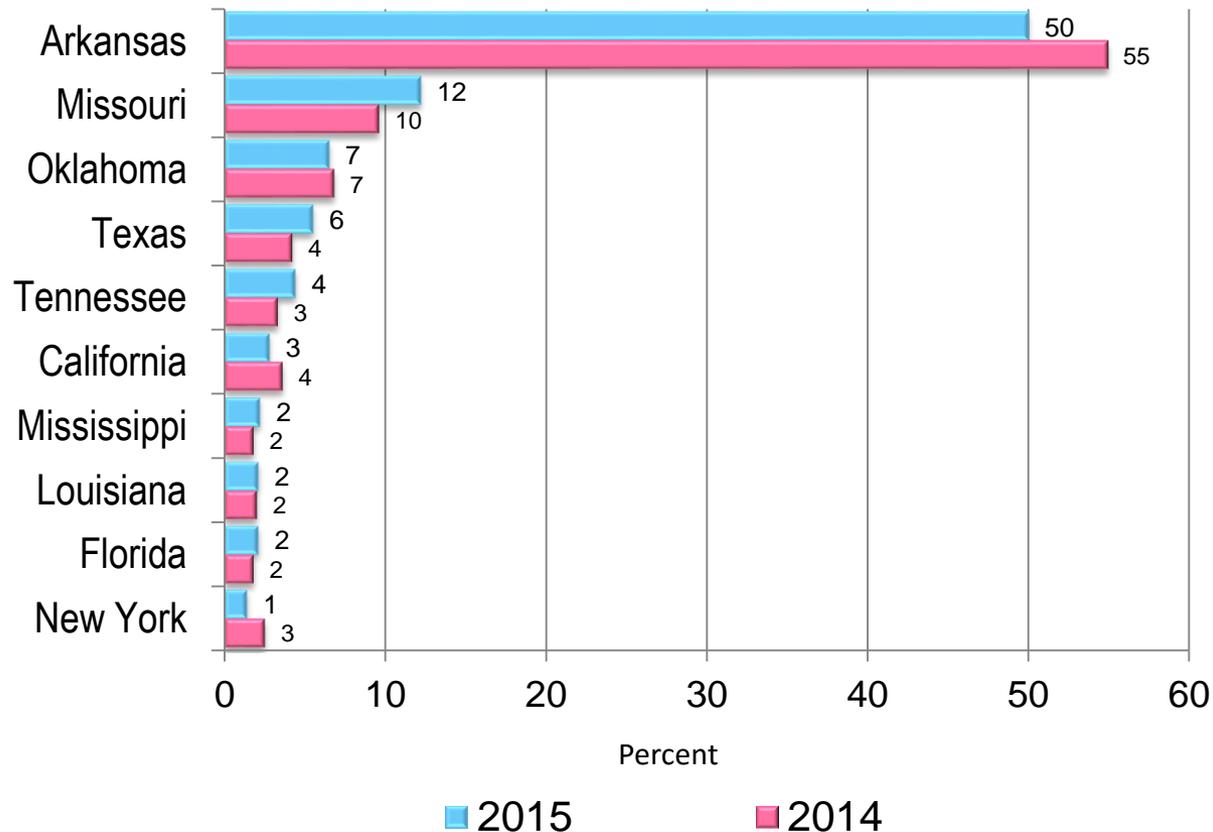


Day Trip Sources of Business

State Origin Of Trip – Day Trips



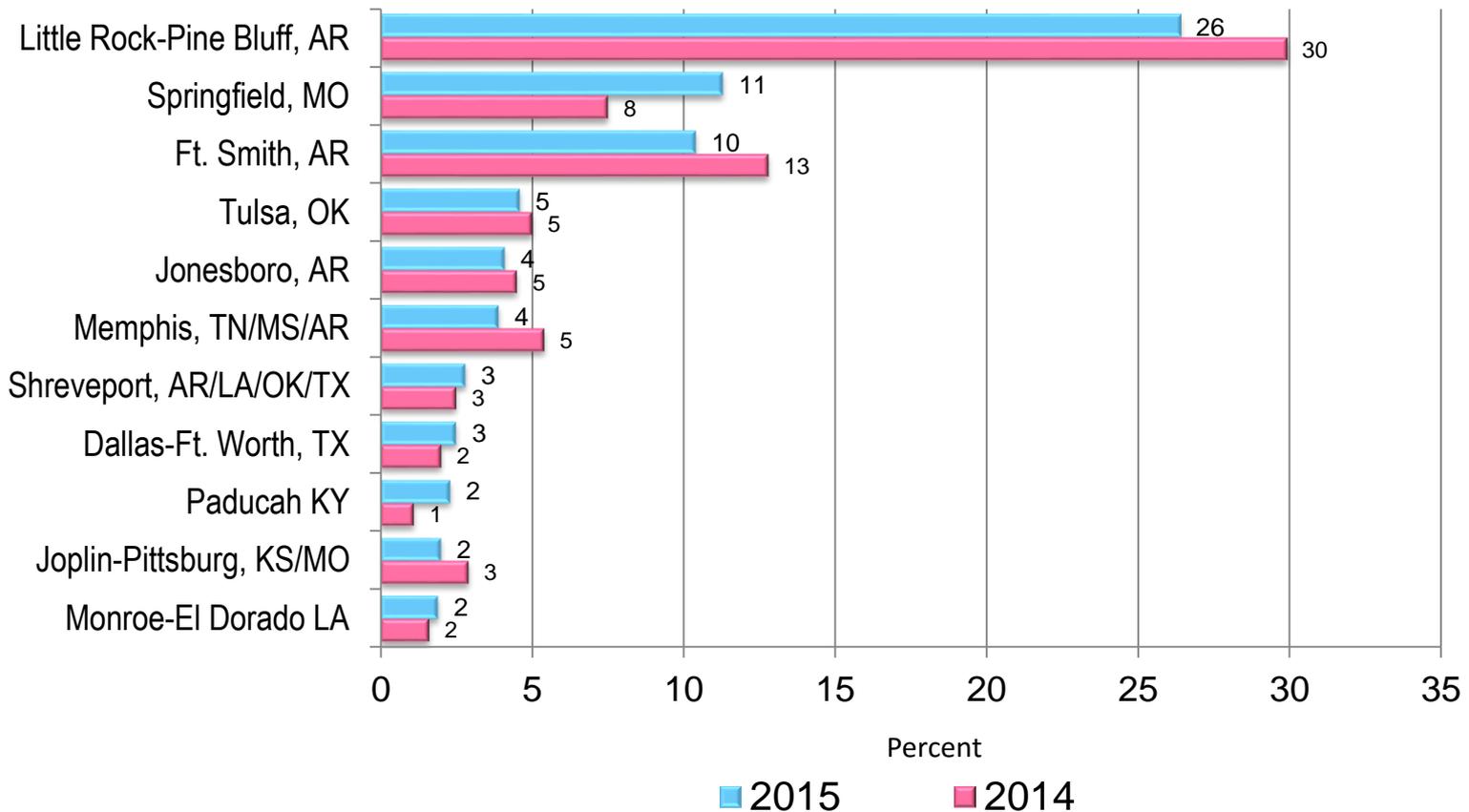
Base: Adult Day Trips to Arkansas



DMA of Residence – Day Trips



Base: Adult Day Trips to Arkansas



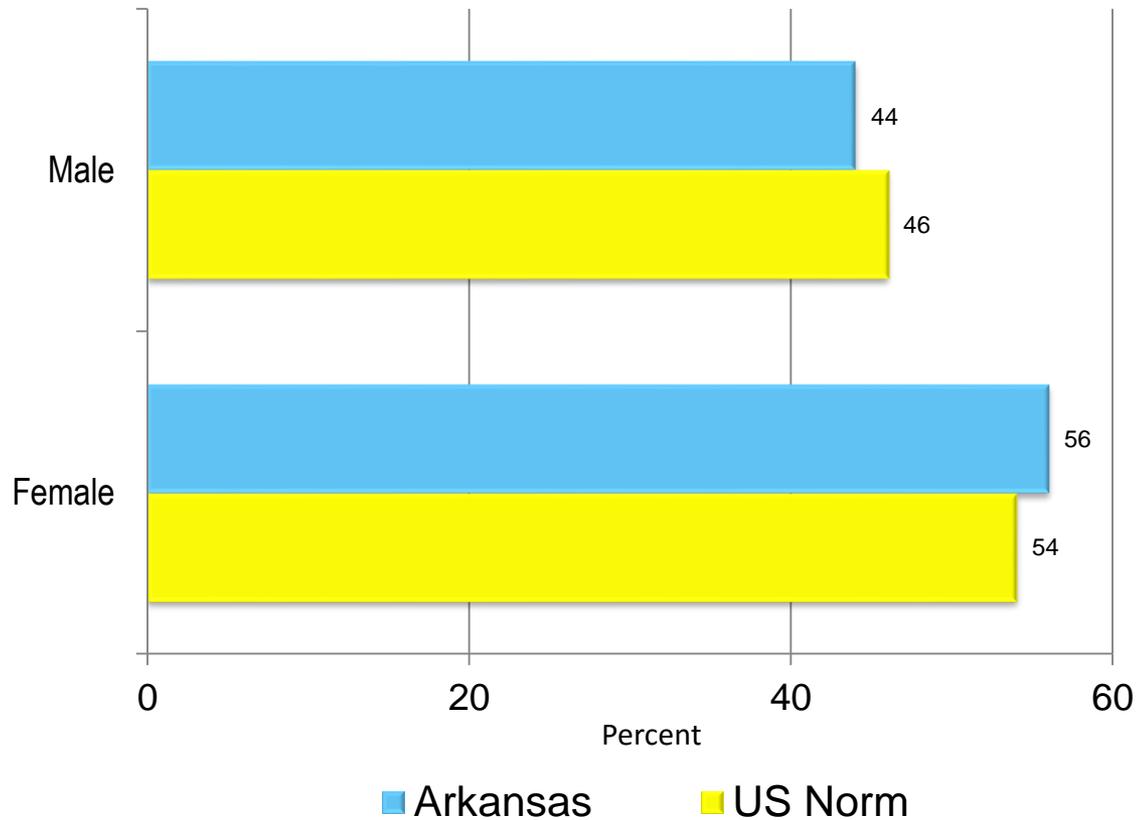


Day Trip Demographics

Gender



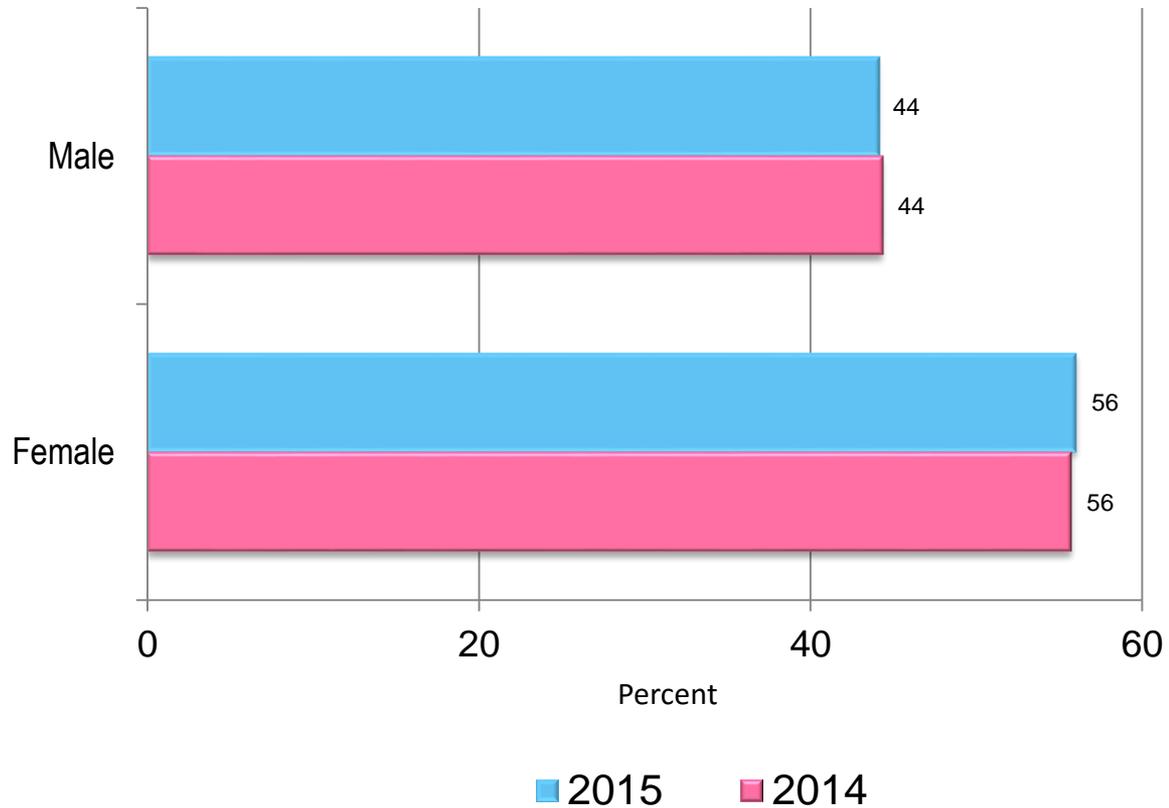
Base: Adult Day Trips



Gender



Base: Adult Day Trips to Arkansas



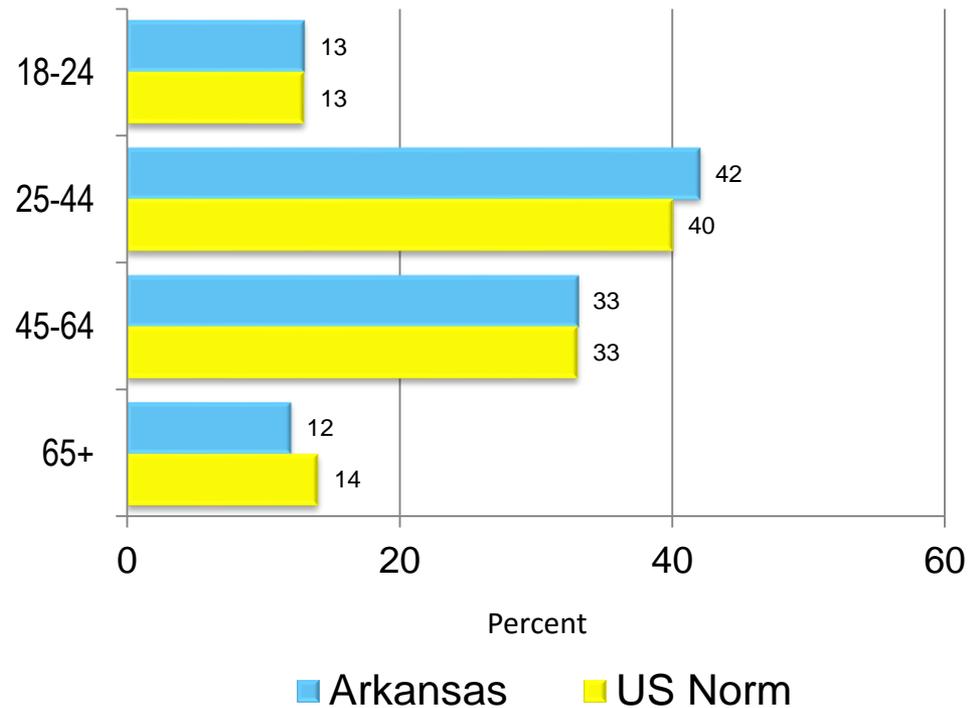
Age



Base: Adult Day Trips

**Average Age
Arkansas
= 43.7**

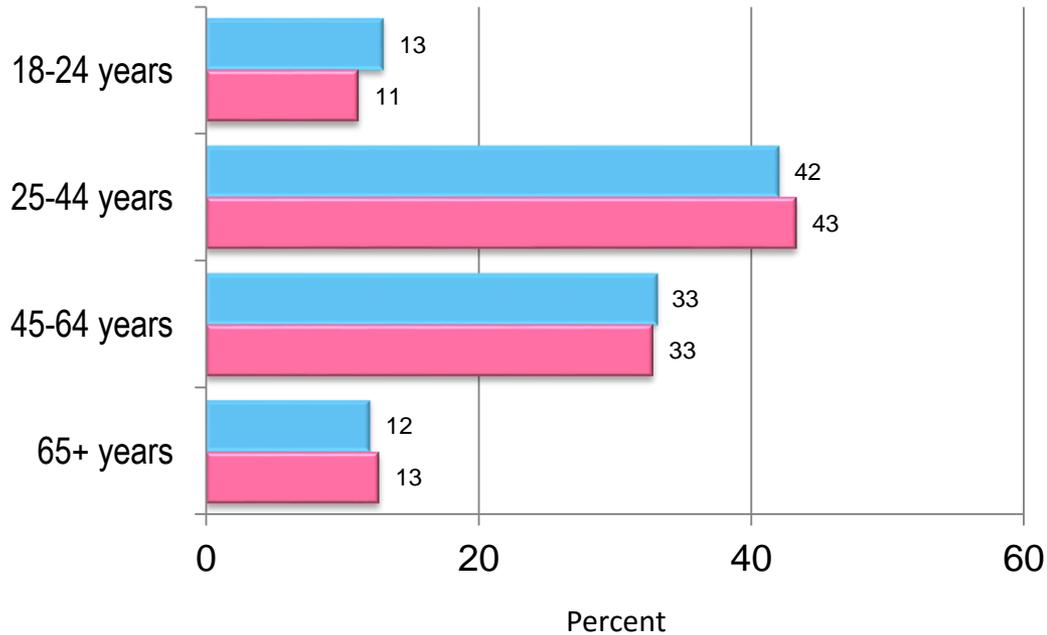
**Average Age
US Norm
= 44.3**



Age



Base: Adult Day Trips to Arkansas

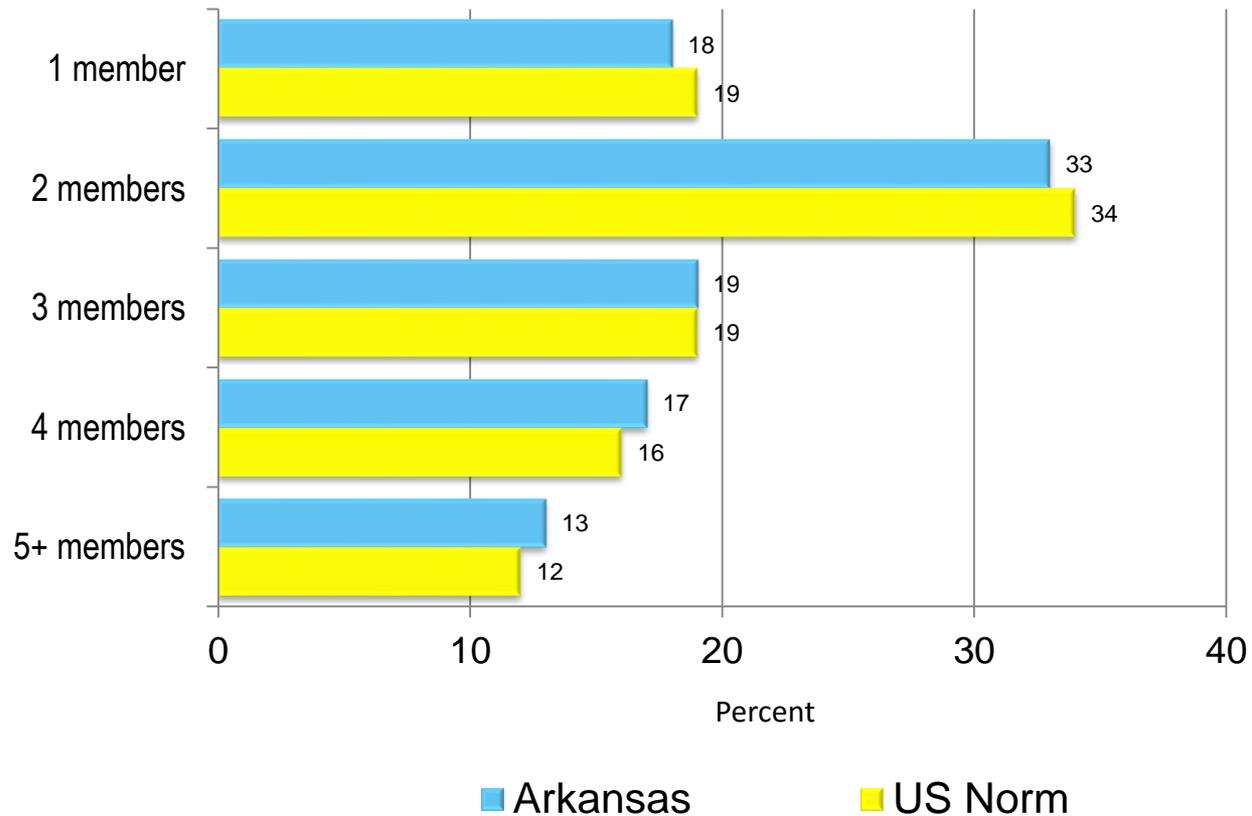


■ Column2 ■ 2014

Household Size



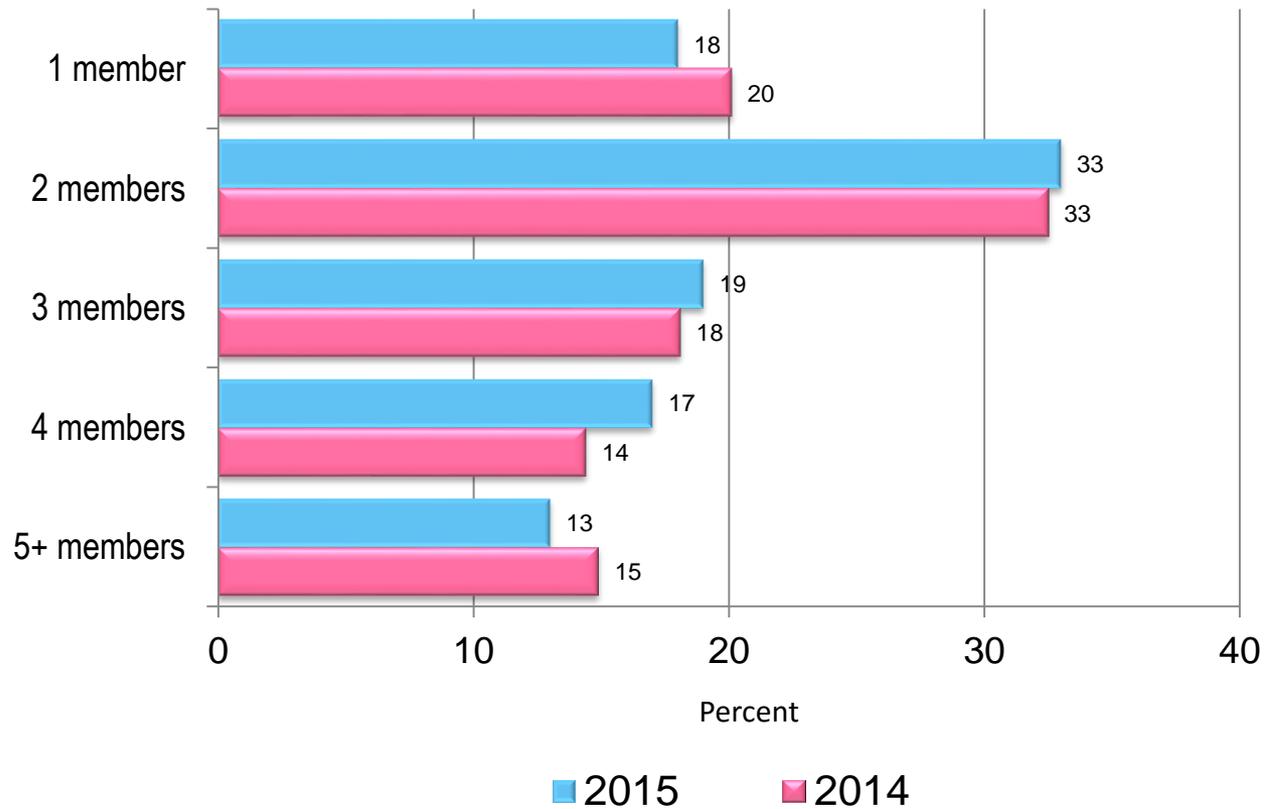
Base: Adult Day Trips



Household Size



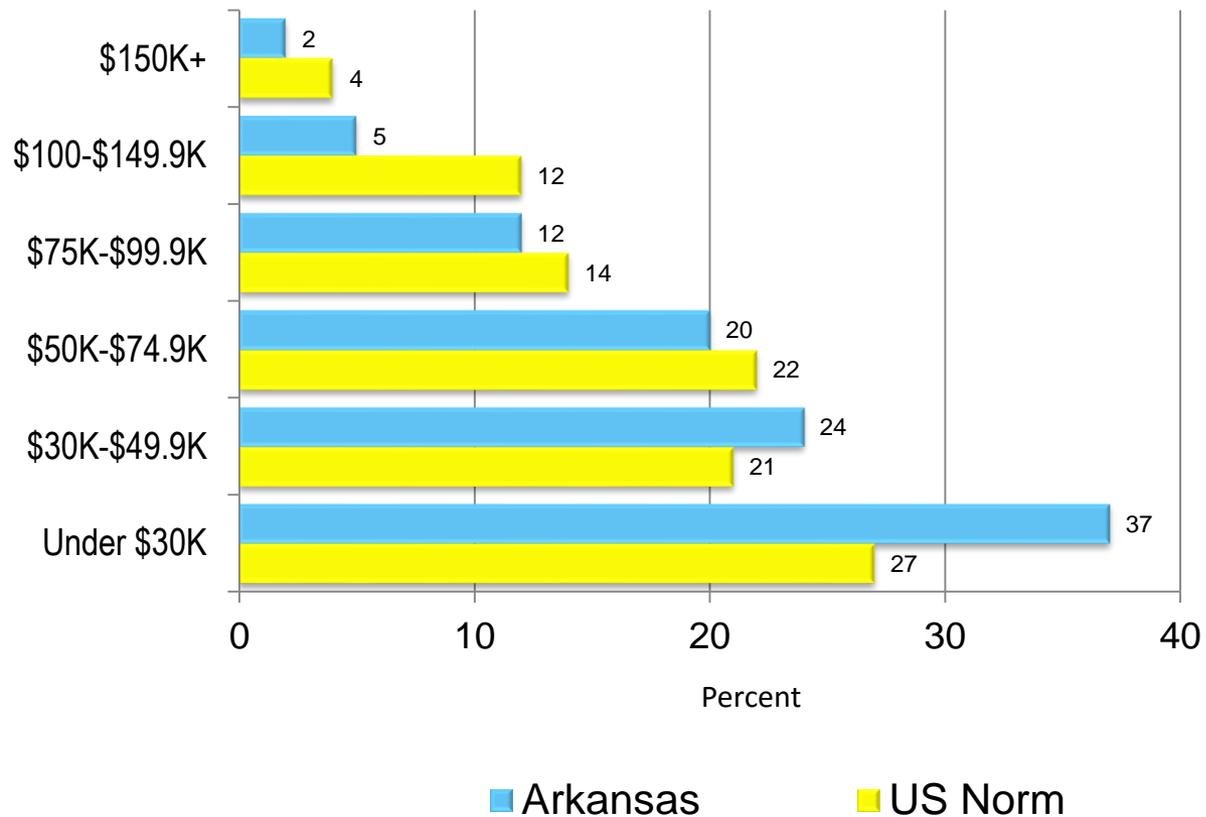
Base: Adult Day Trips to Arkansas



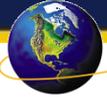
Household Income



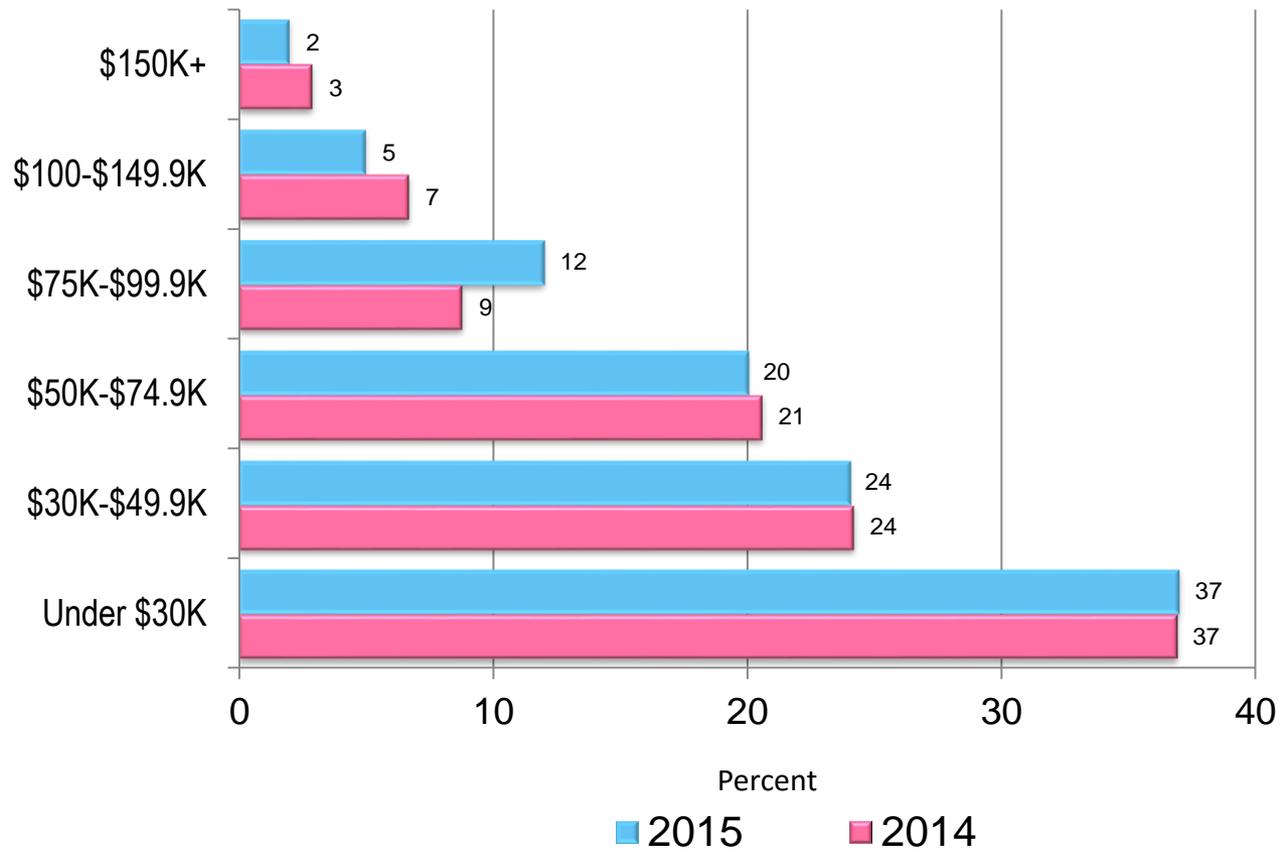
Base: Adult Day Trips



Household Income



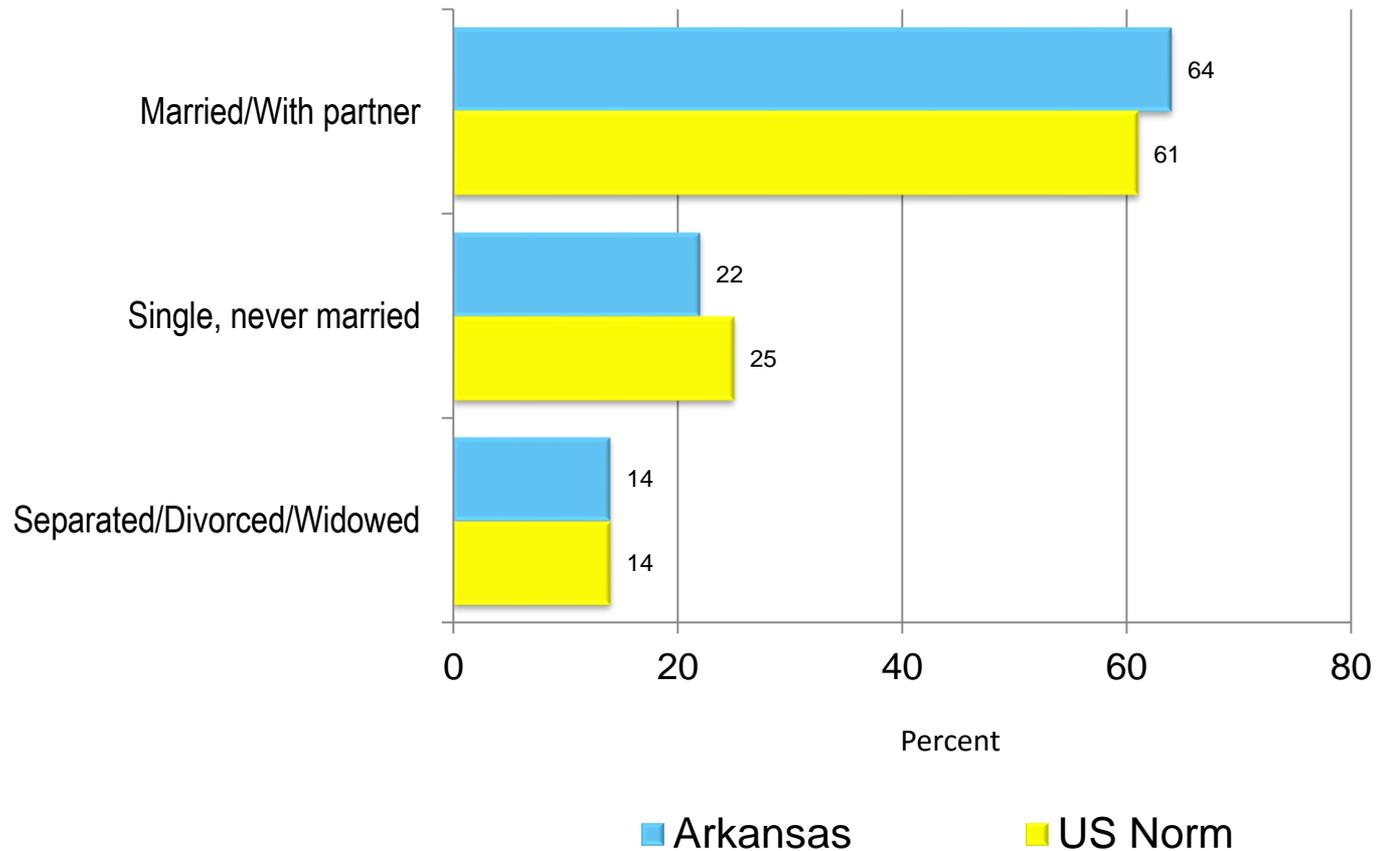
Base: Adult Day Trips to Arkansas



Marital Status



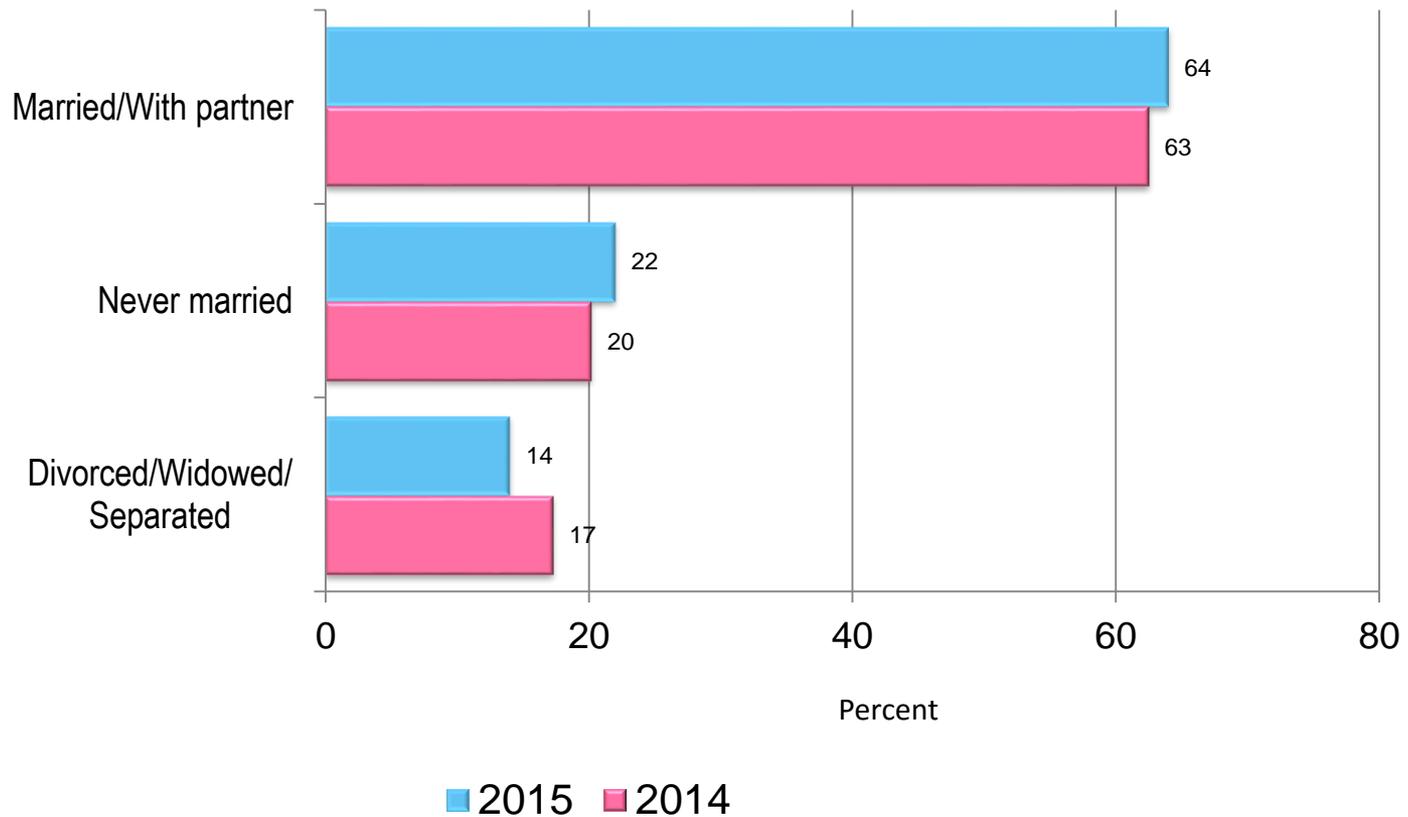
Base: Adult Day Trips



Marital Status



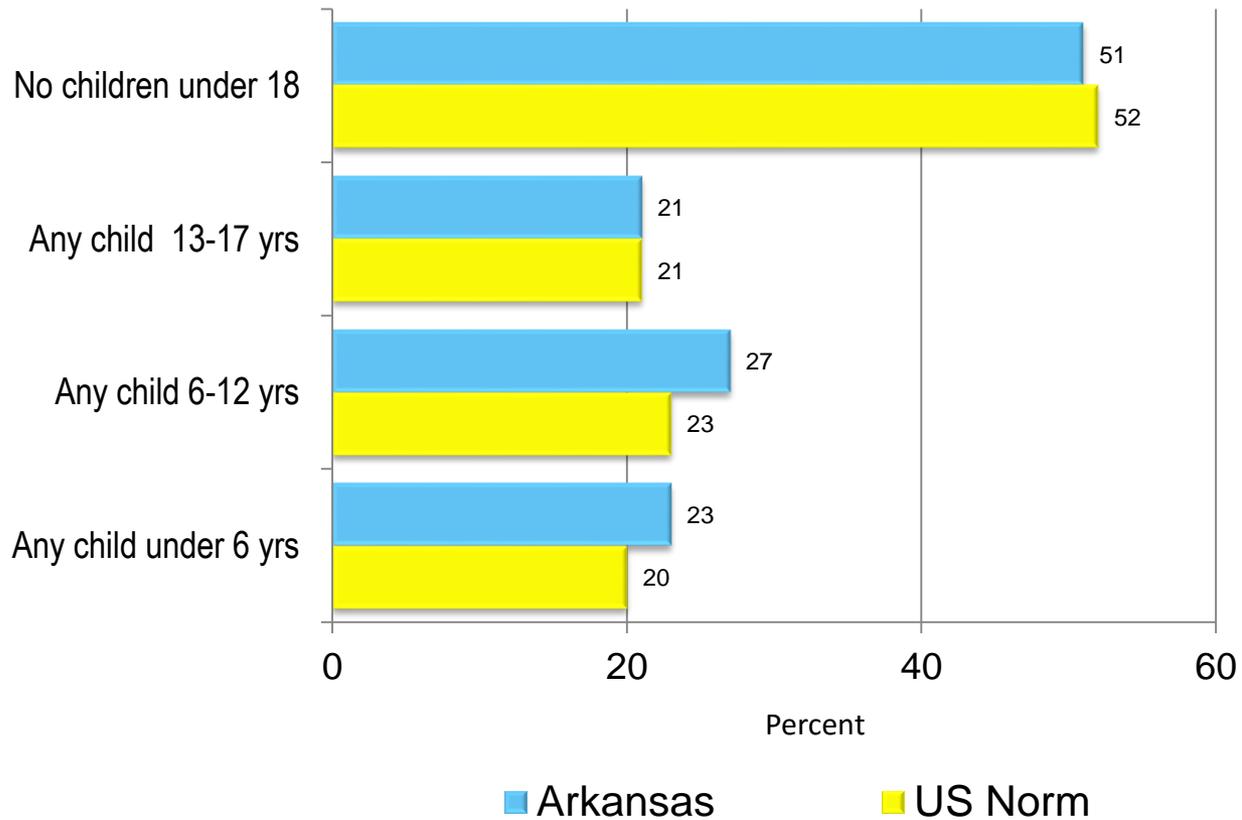
Base: Adult Day Trips to Arkansas



Children in Household



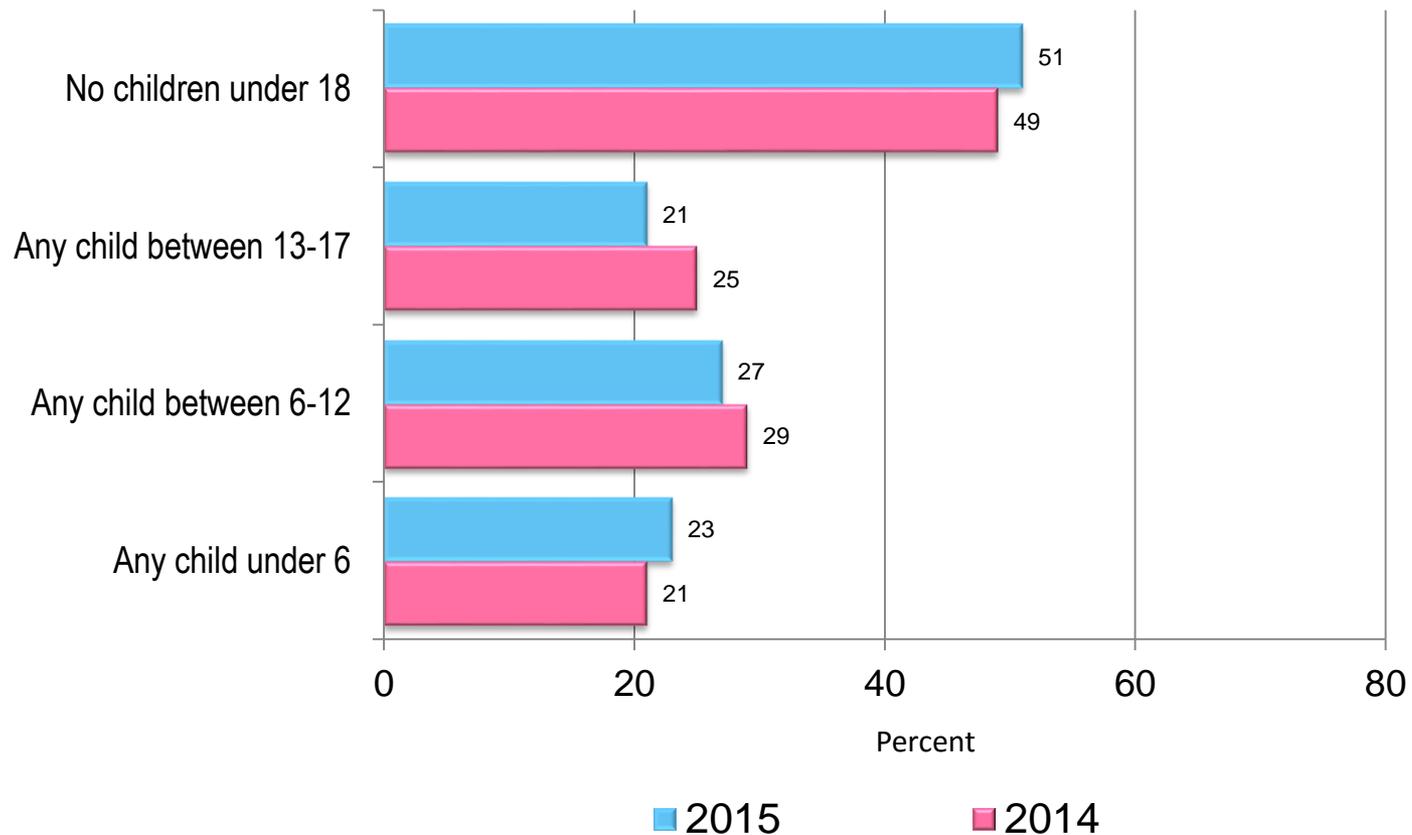
Base: Adult Day Trips



Children in Household



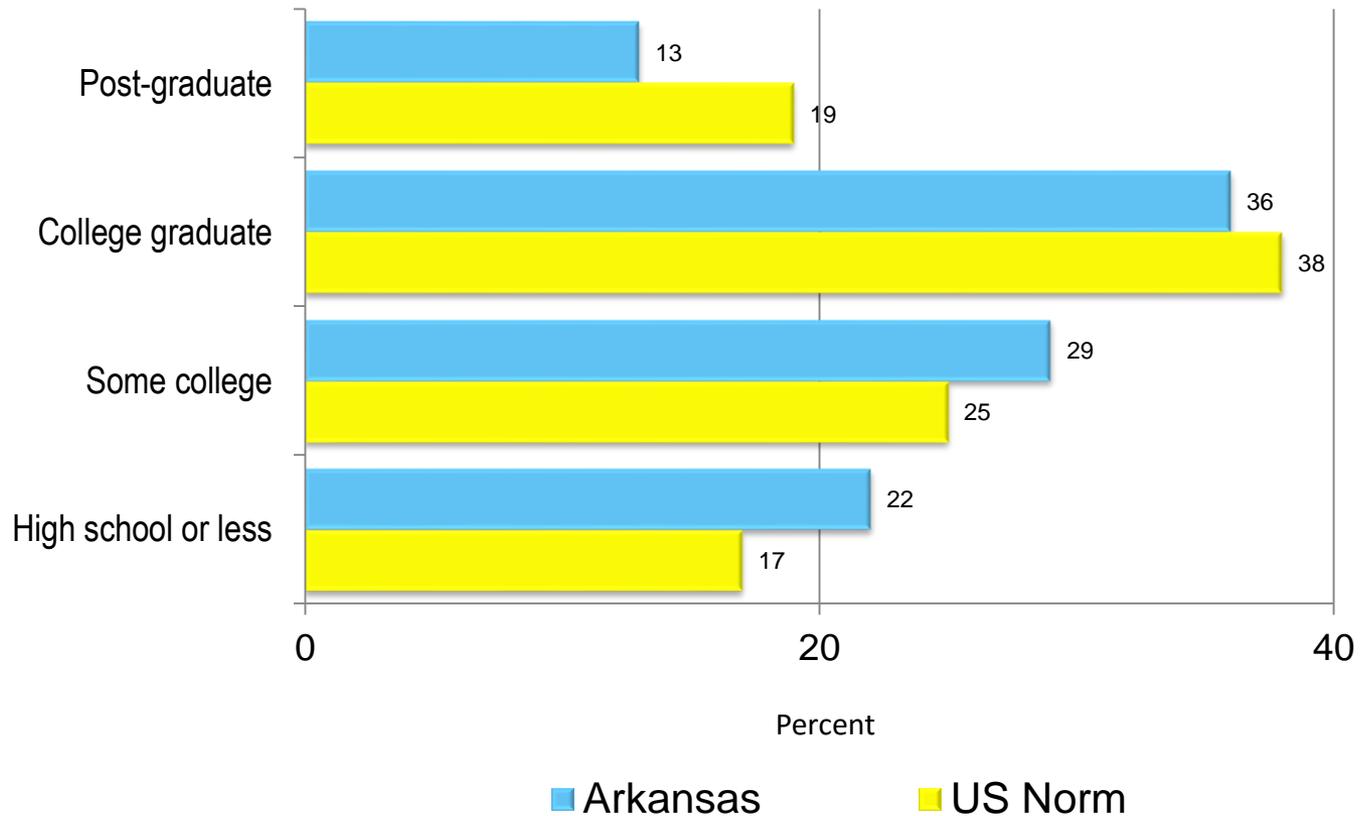
Base: Adult Day Trips to Arkansas



Education



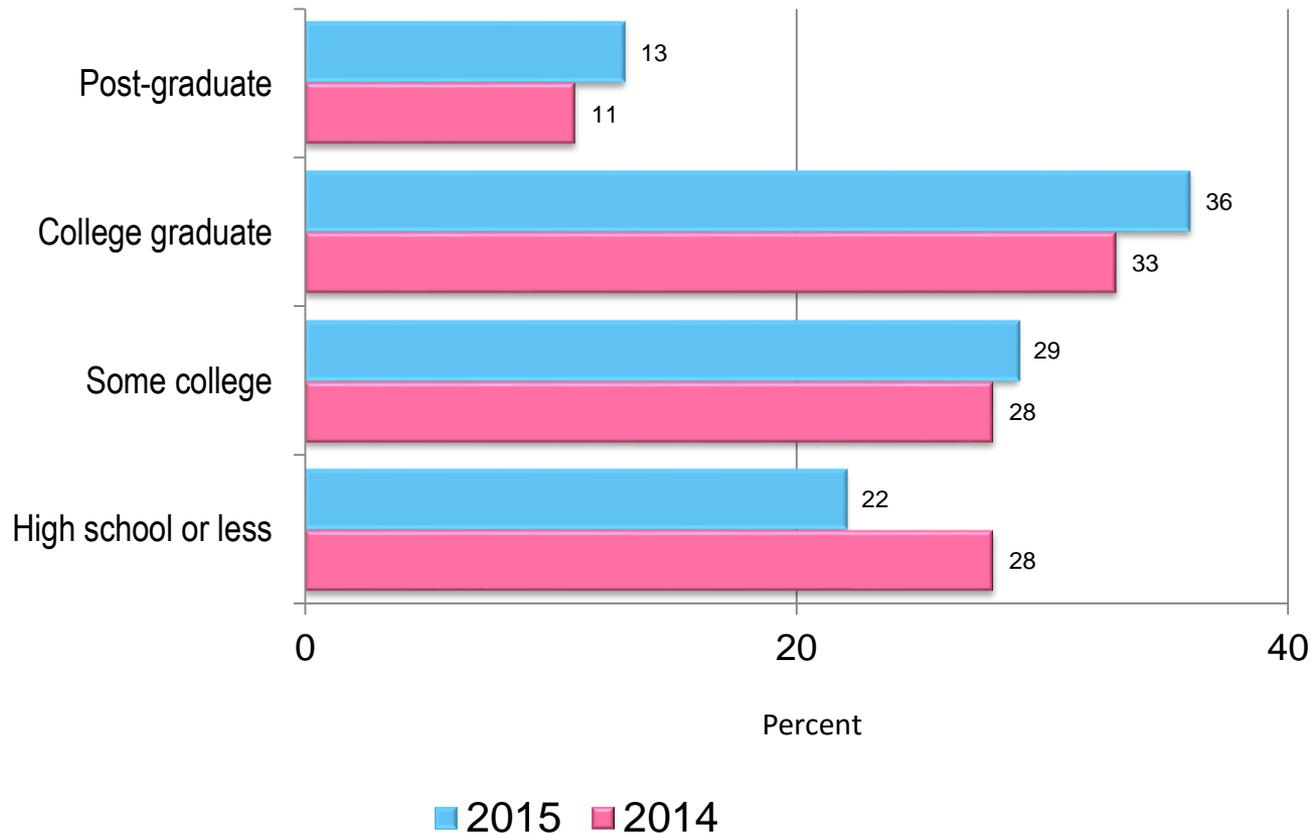
Base: Adult Day Trips



Education



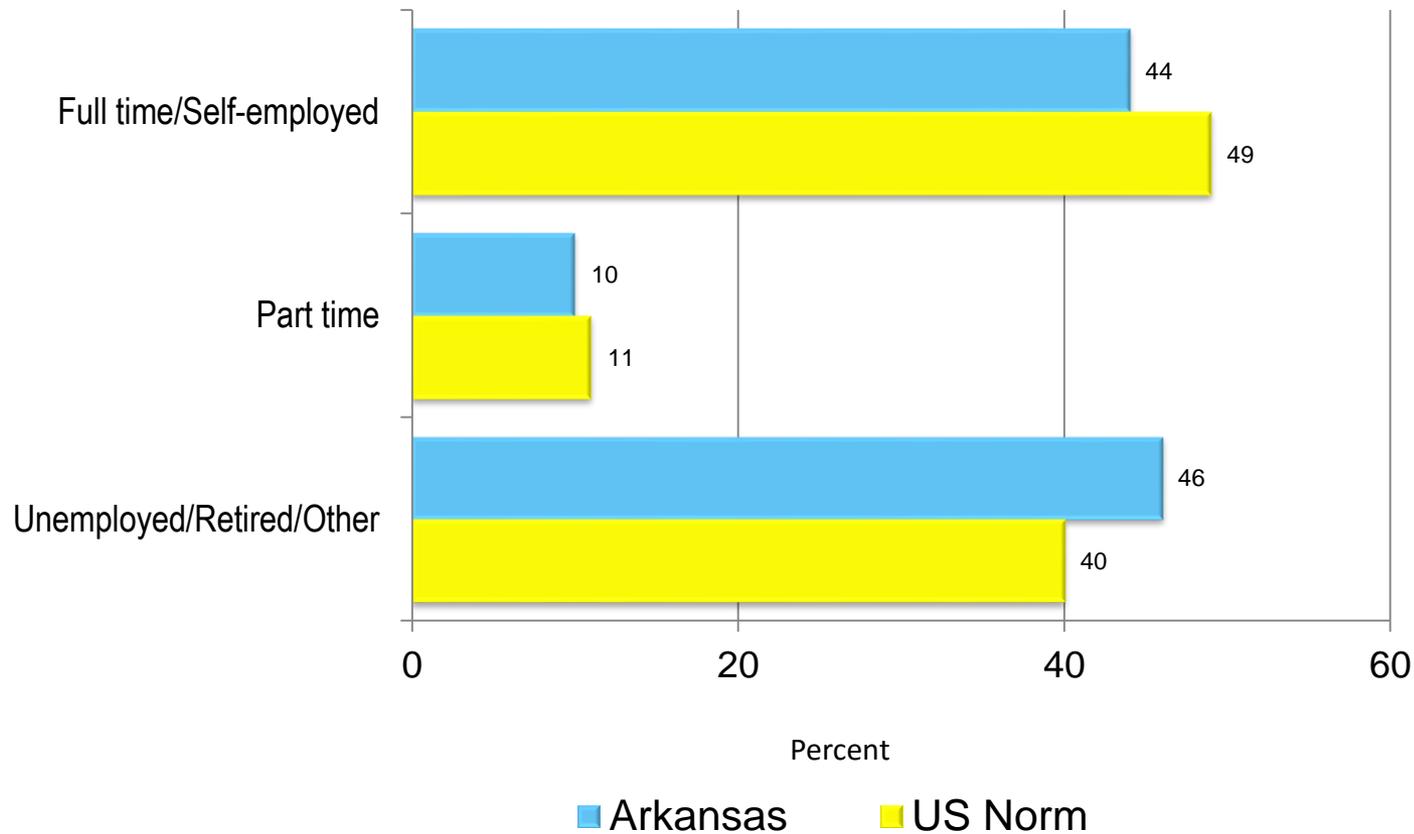
Base: Adult Day Trips to Arkansas



Employment



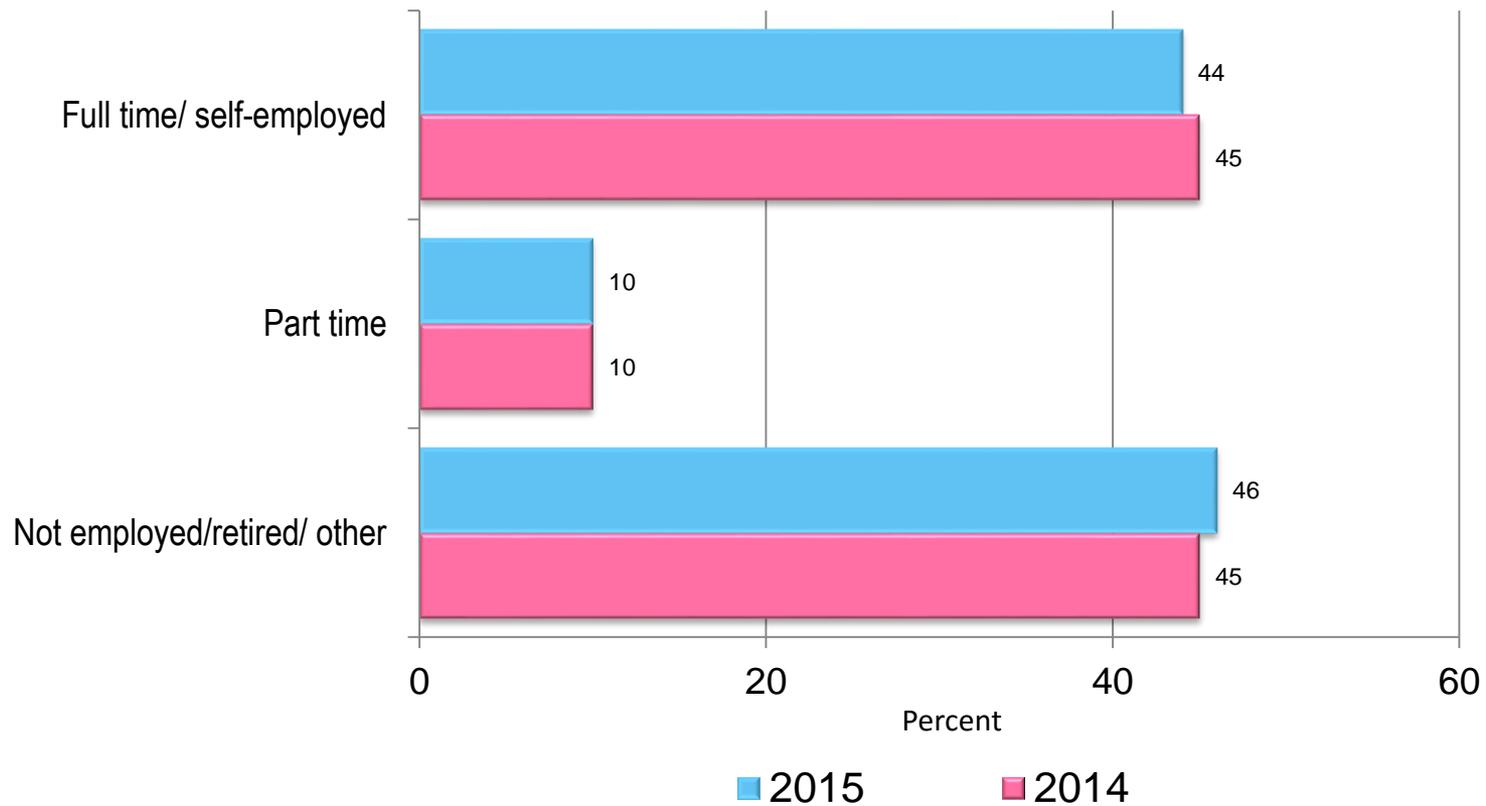
Base: Adult Day Trips



Employment



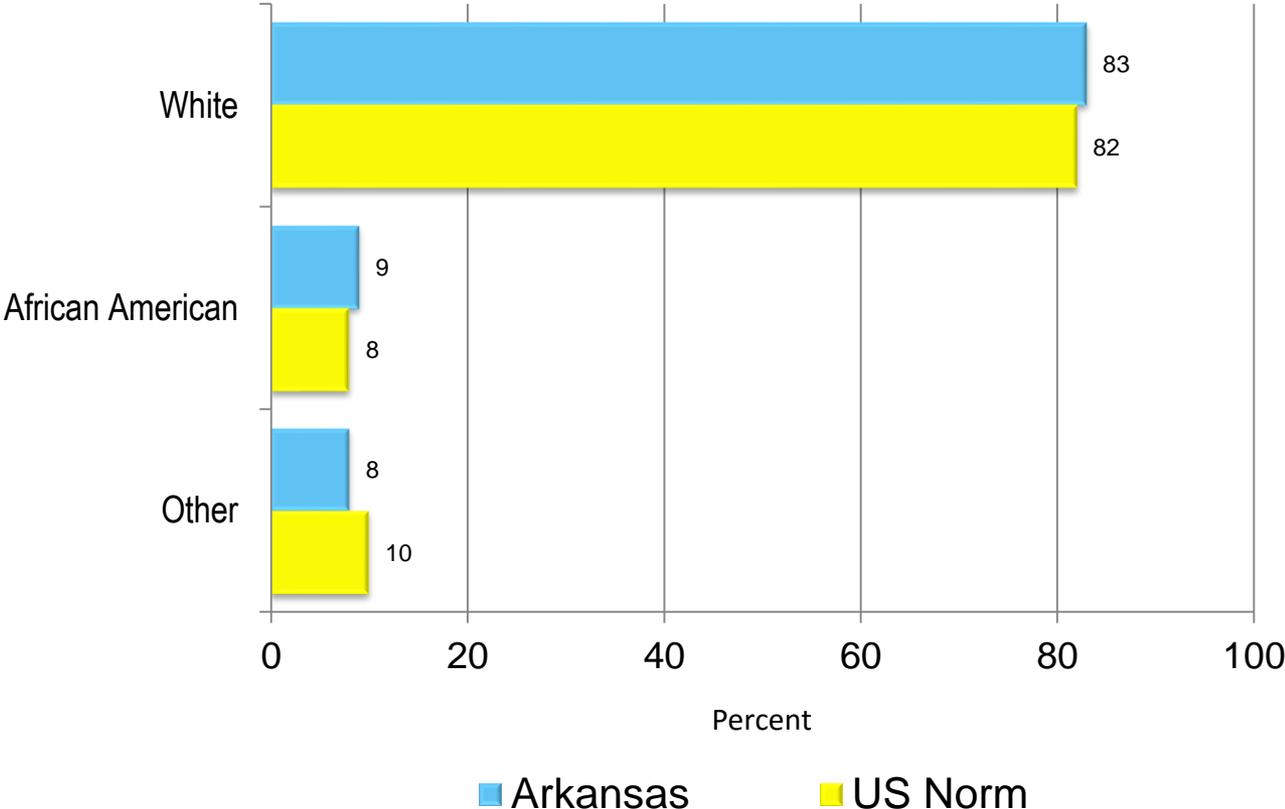
Base: Adult Day Trips to Arkansas



Race



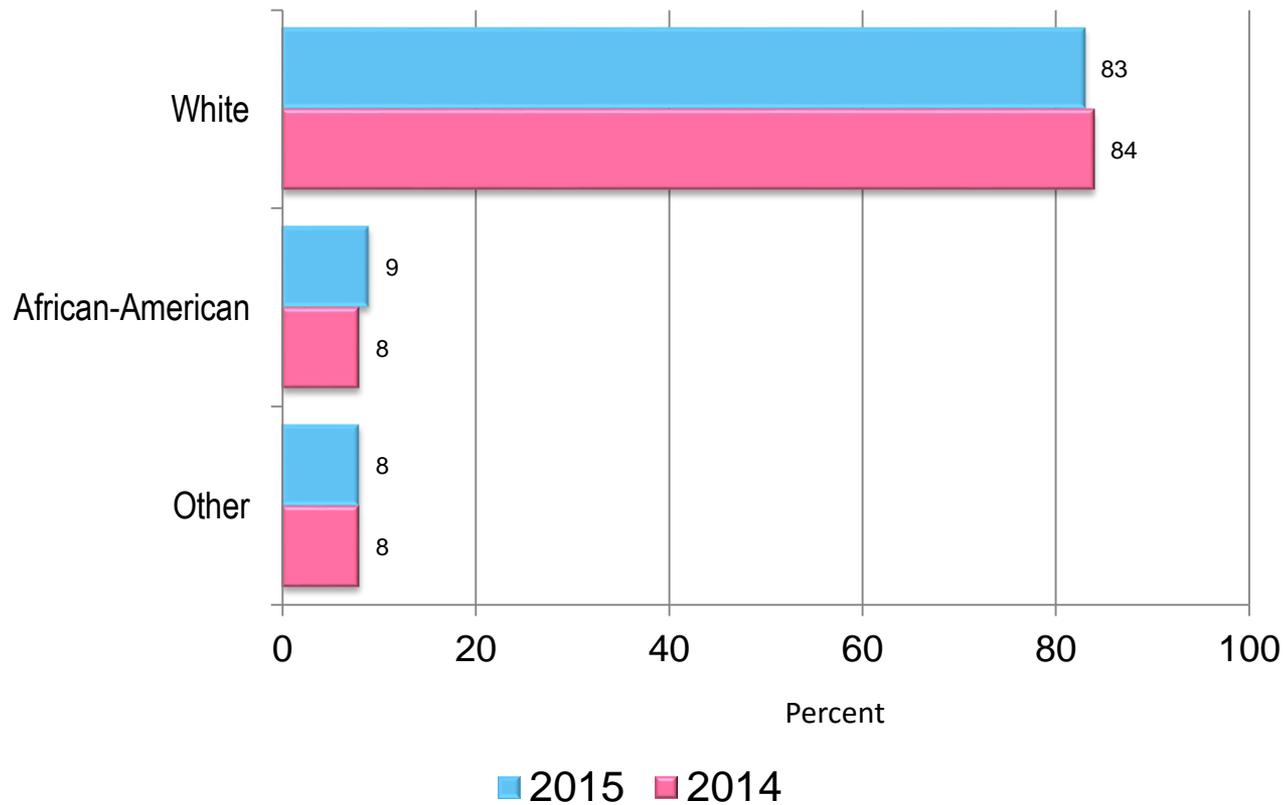
Base: Adult Day Trips



Race



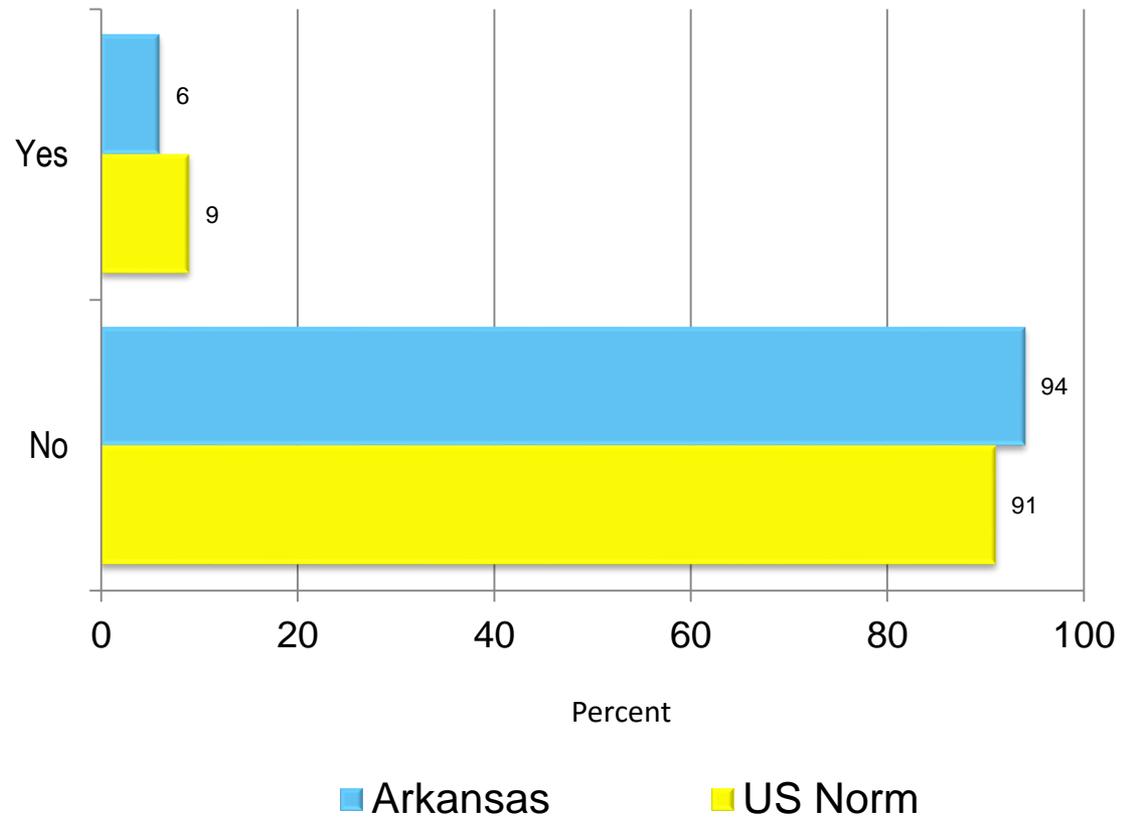
Base: Adult Day Trips to Arkansas



Hispanic Background



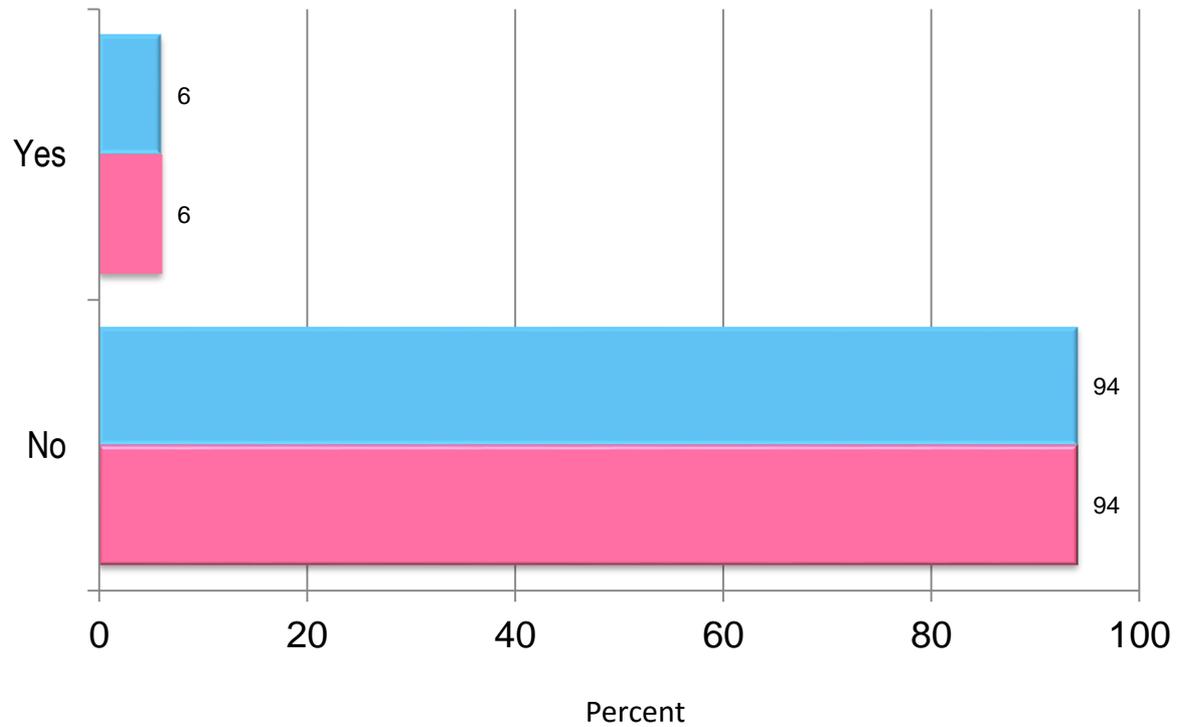
Base: Adult Day Trips



Hispanic Background



Base: Adult Day Trips to Arkansas



■ 2015 ■ 2014

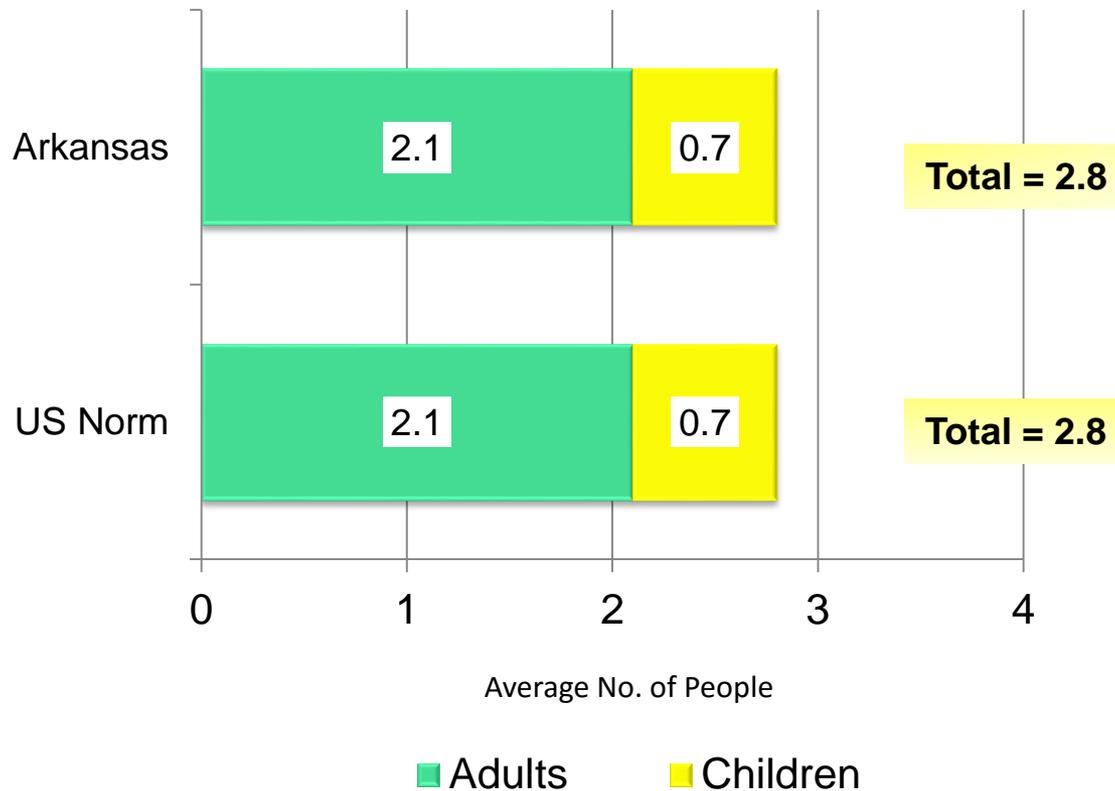


Day Trip Characteristics

Size of Travel Party



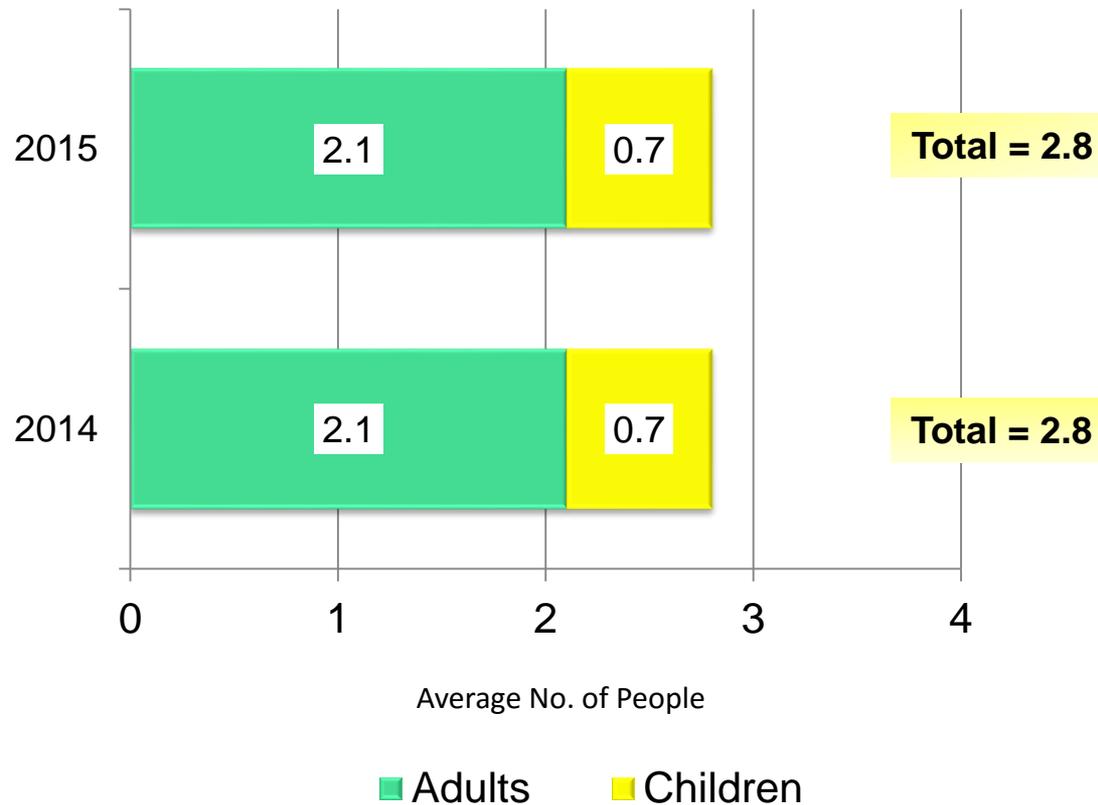
Base: Total Day Trips



Size of Travel Party



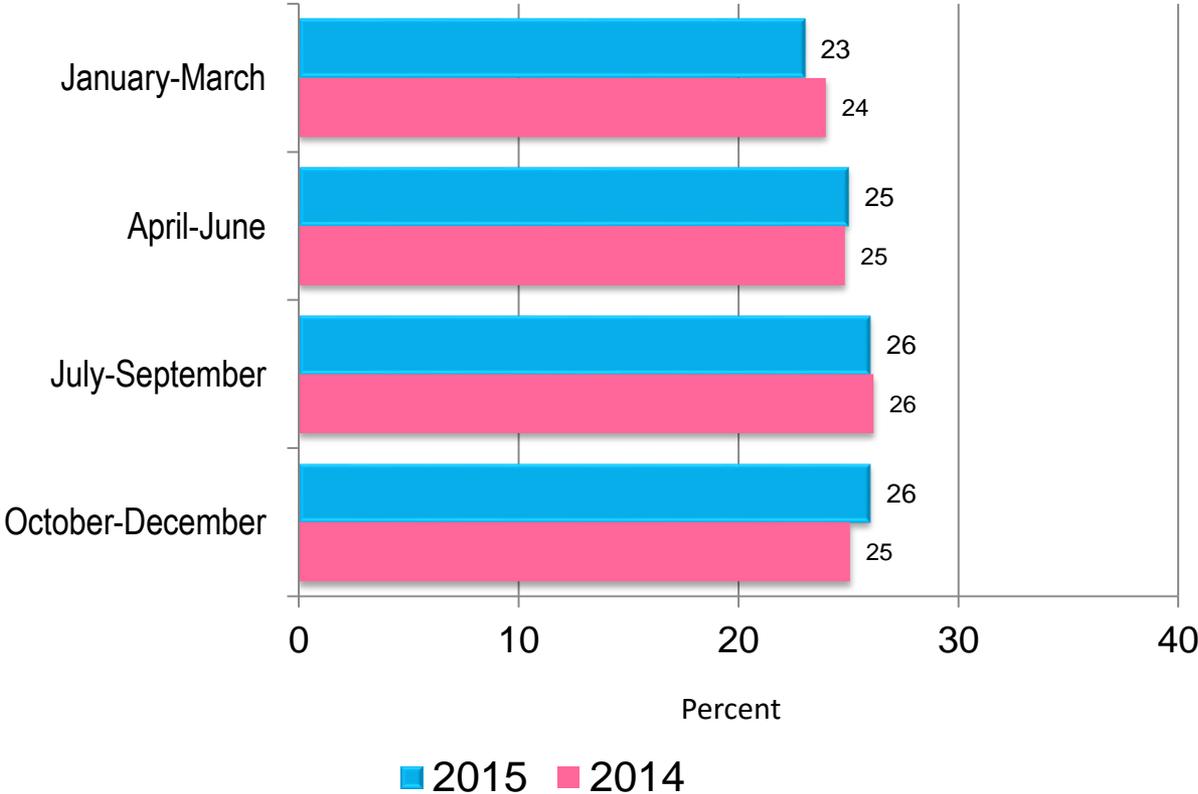
Base: Total Day Trips to Arkansas



Season of Trip



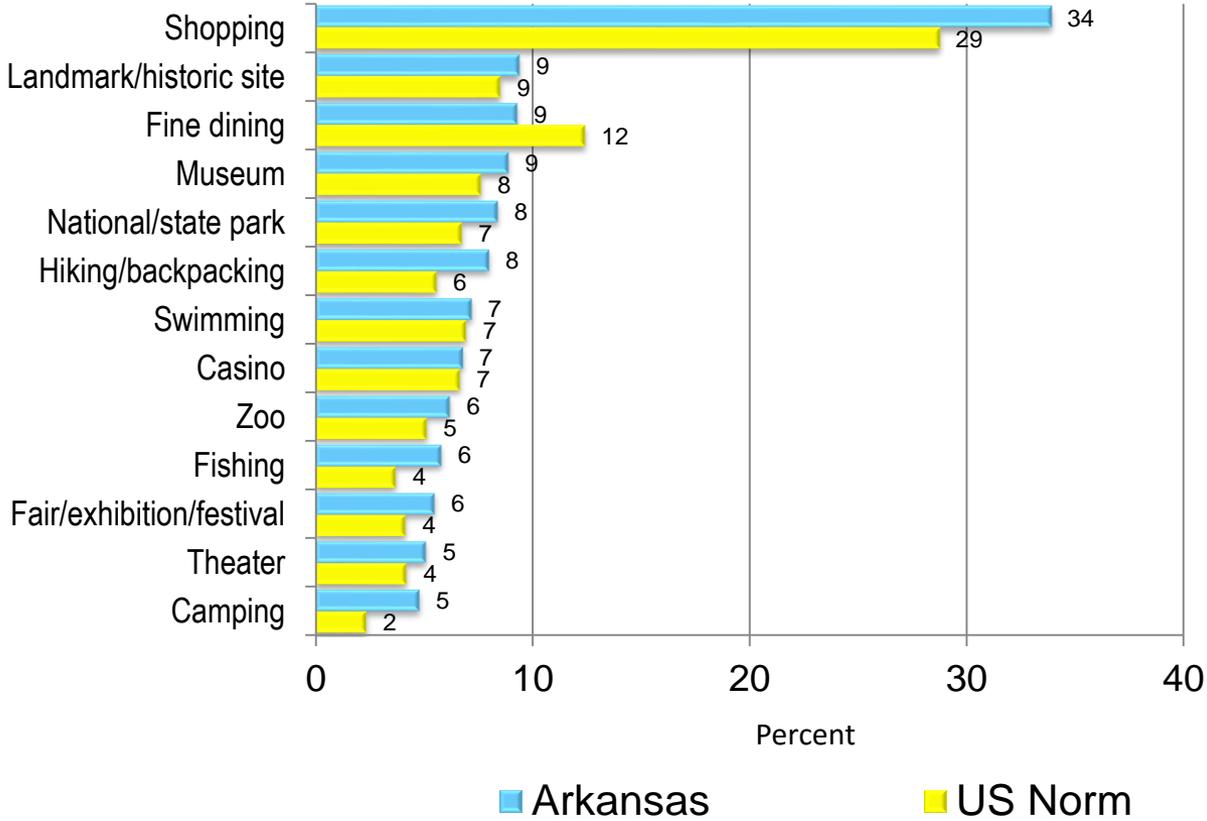
Base: Adult Day Trips to Arkansas



Activities and Experiences



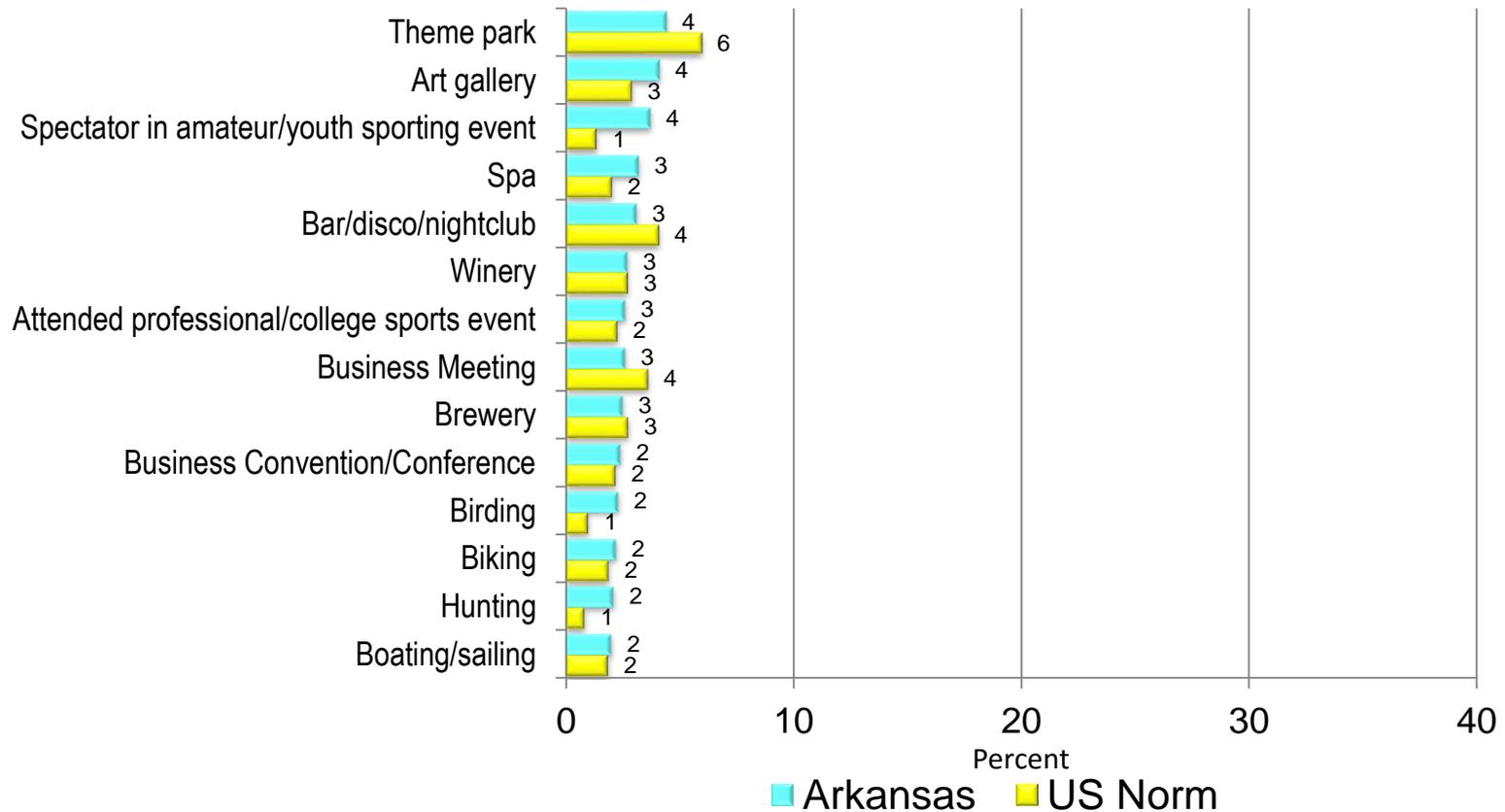
Base: Adult Day Trips



Activities and Experiences (Cont'd)



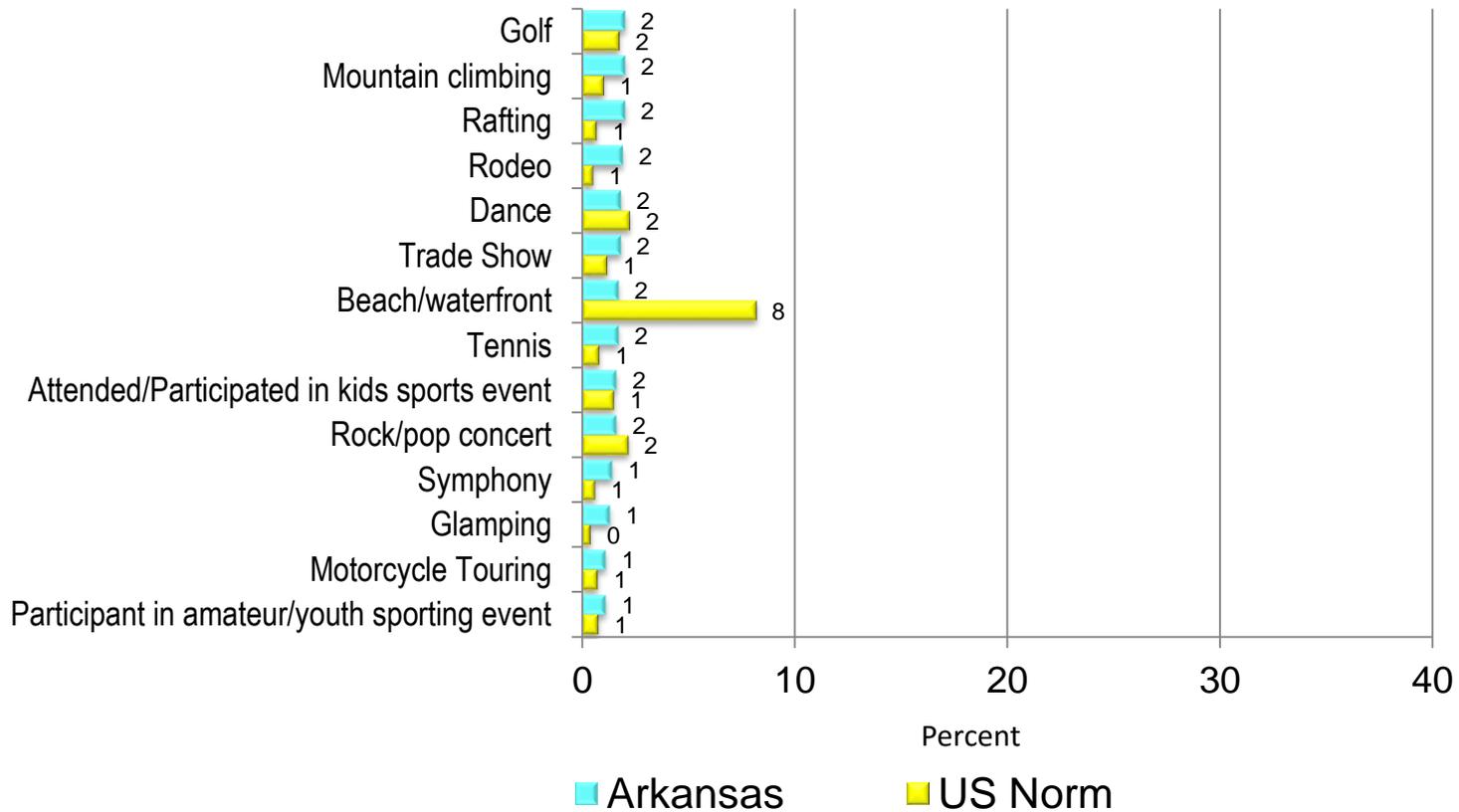
Base: Adult Day Trips



Activities and Experiences (Cont'd)



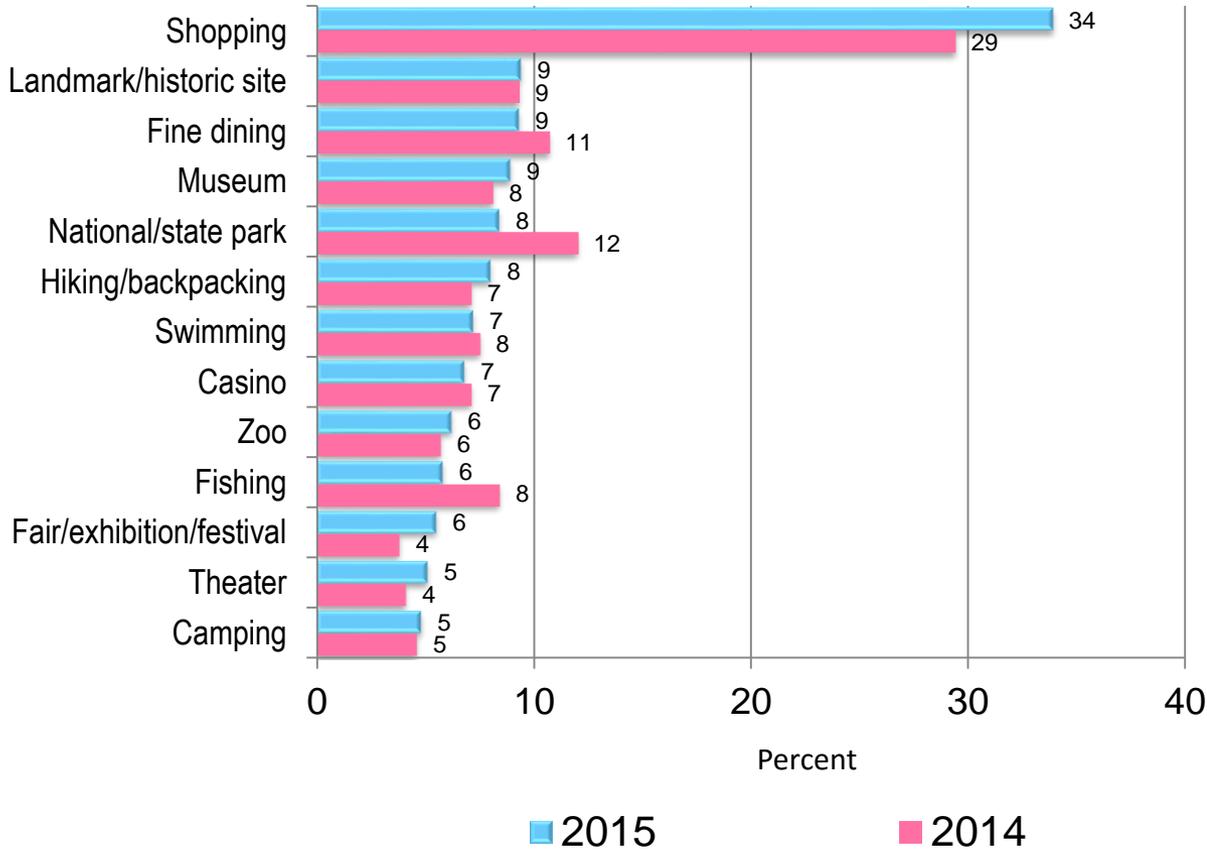
Base: Adult Day Trips



Activities and Experiences



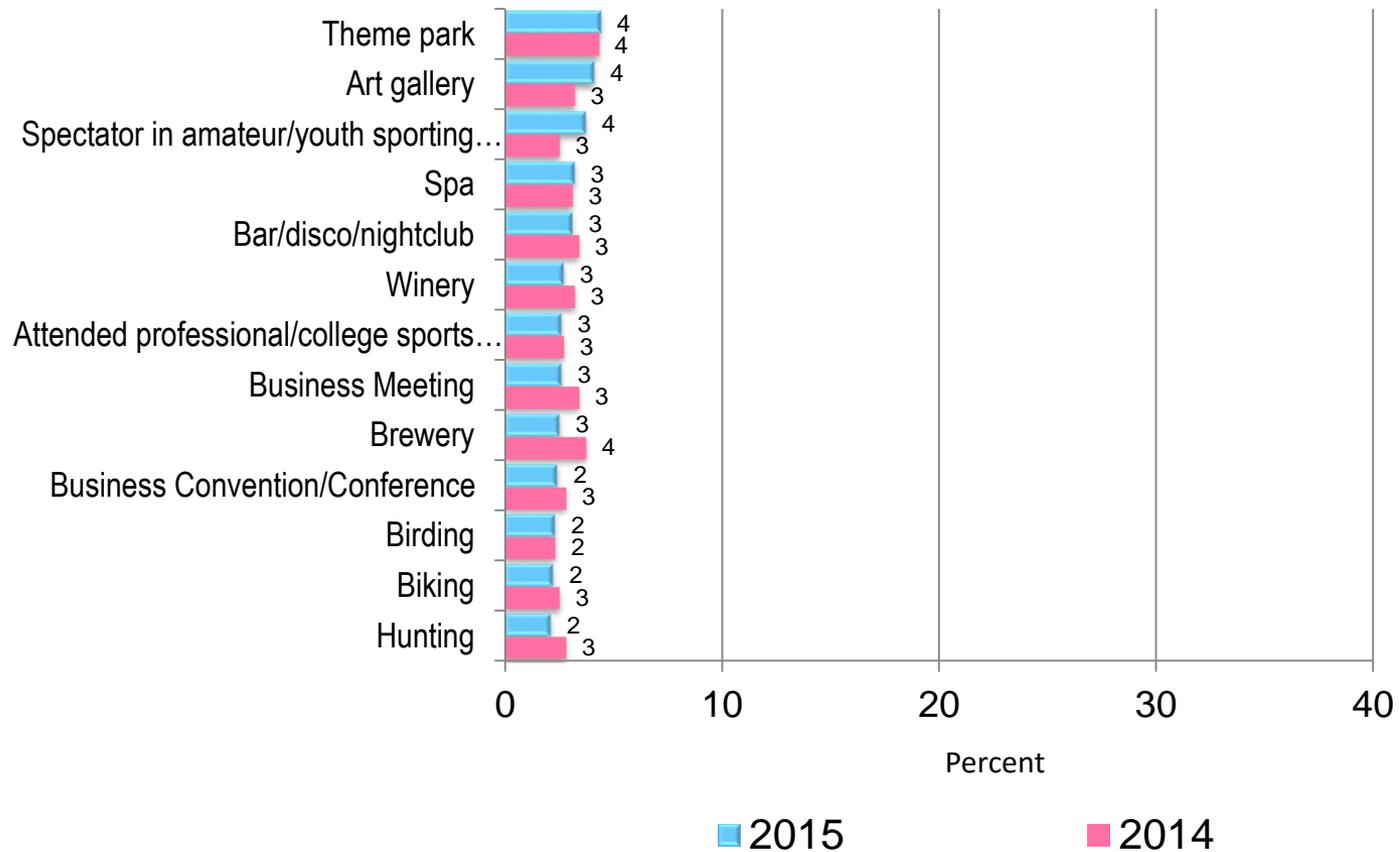
Base: Adult Day Trips to Arkansas



Activities and Experiences (Cont'd)



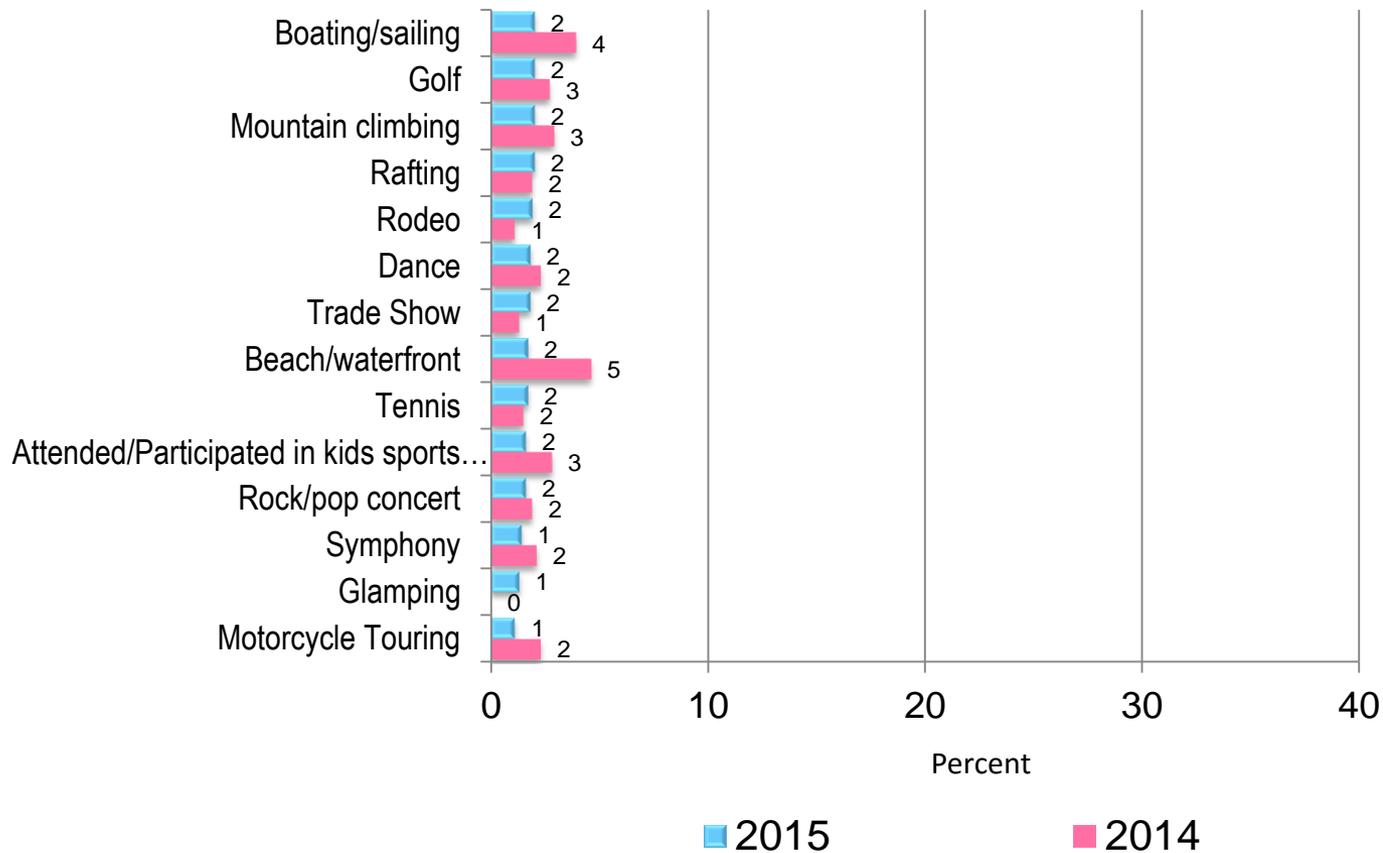
Base: Adult Day Trips to Arkansas



Activities and Experiences (Cont'd)



Base: Adult Day Trips to Arkansas



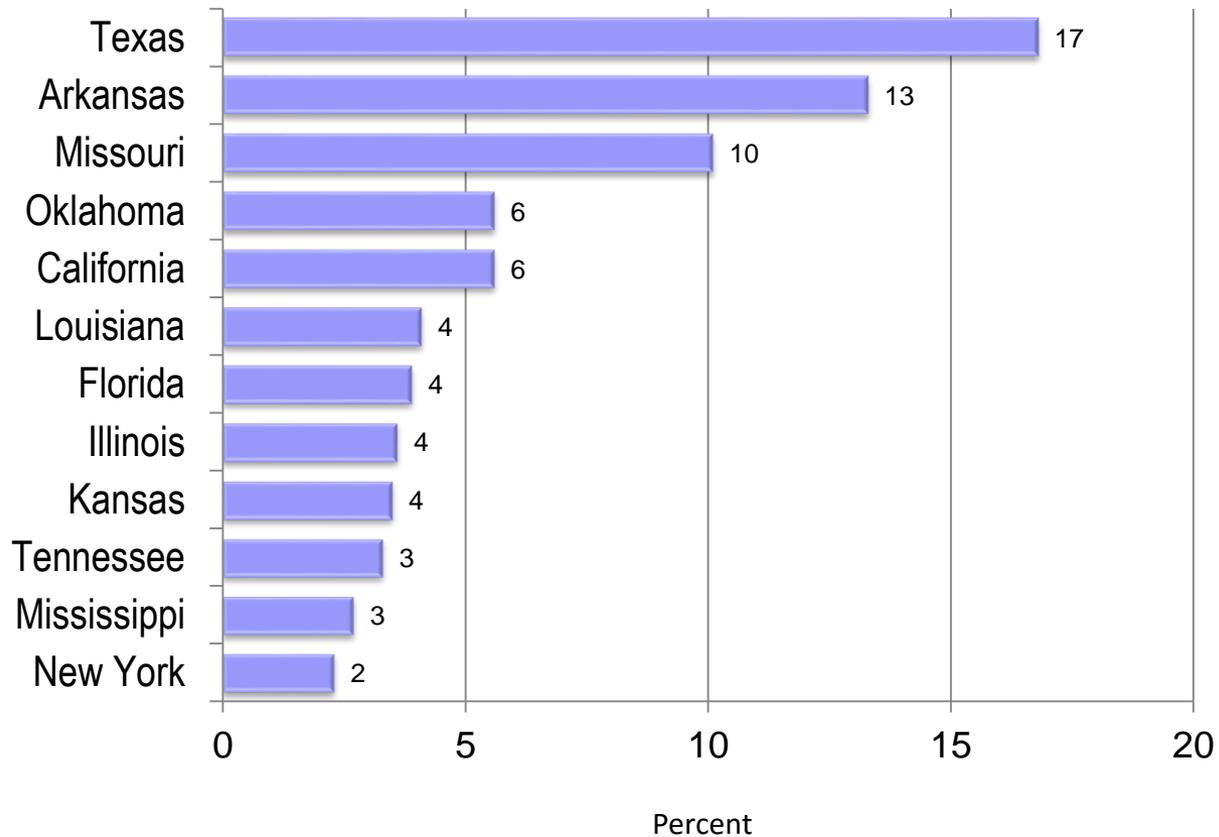


Demographic Profile of Overnight Intenders

State of Residence

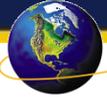


Base: Overnight Intenders*

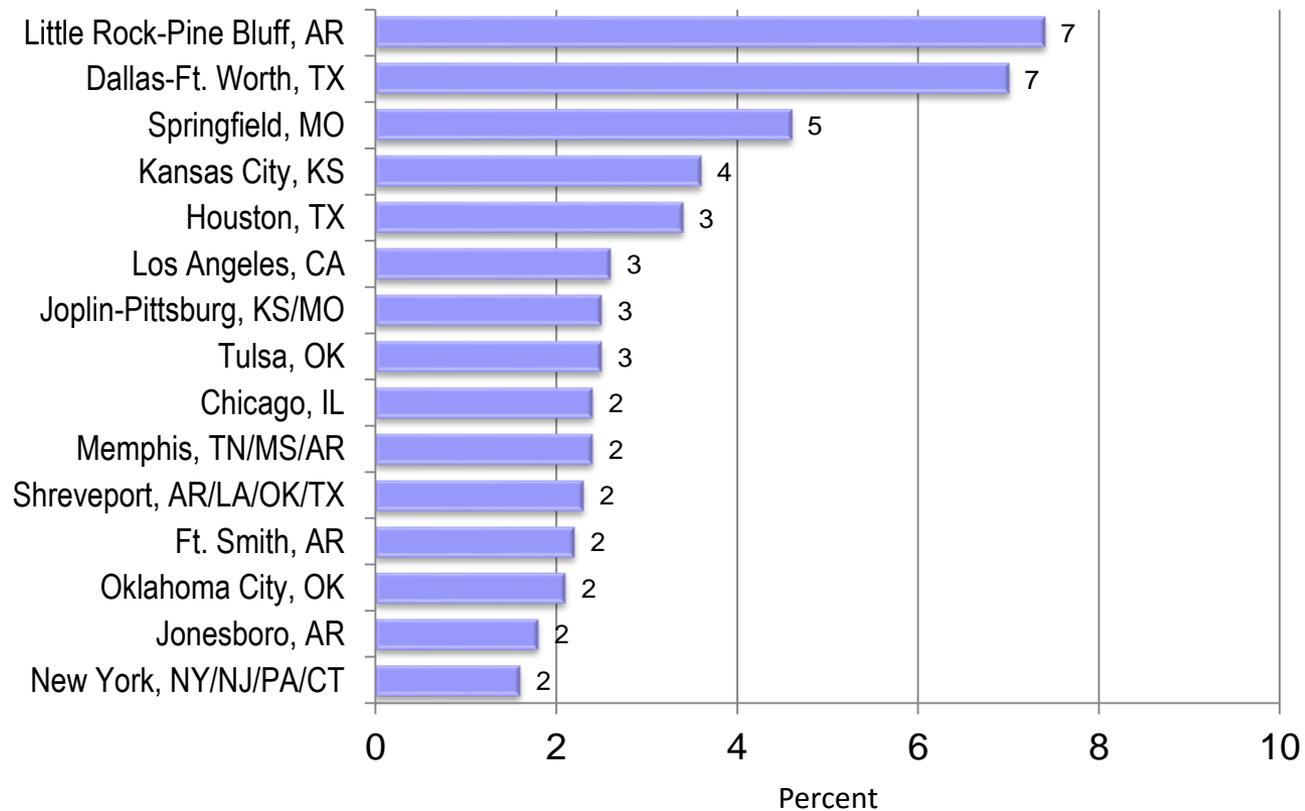


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

DMA of Residence



Base: Overnight Intenders*

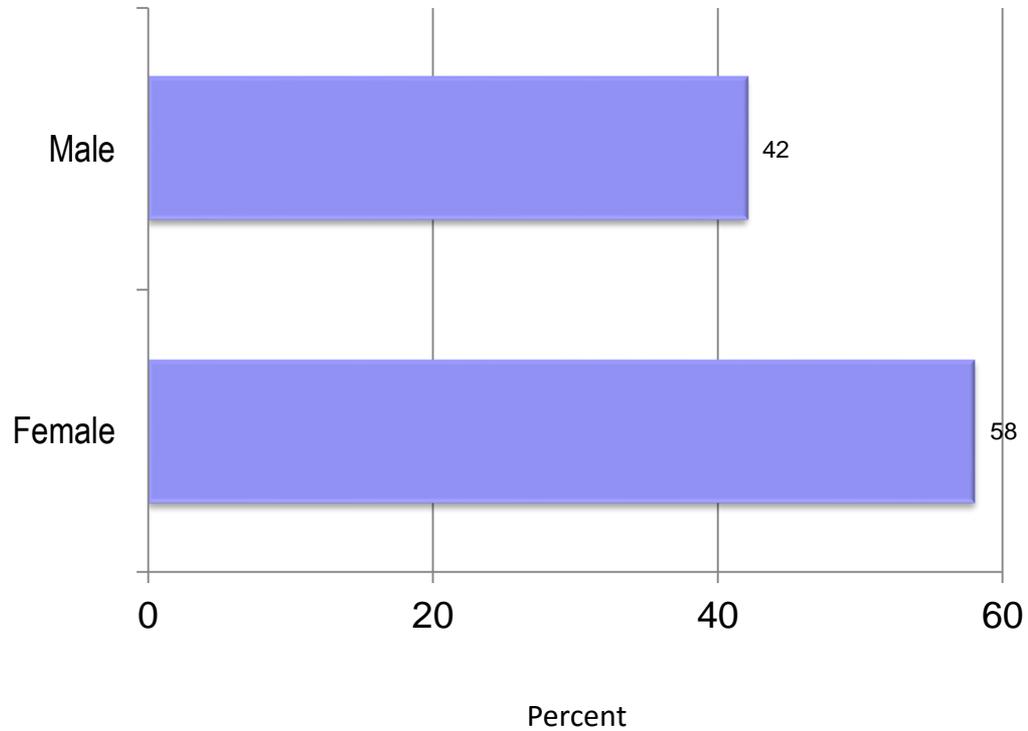


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Gender



Base: Overnight Intenders*

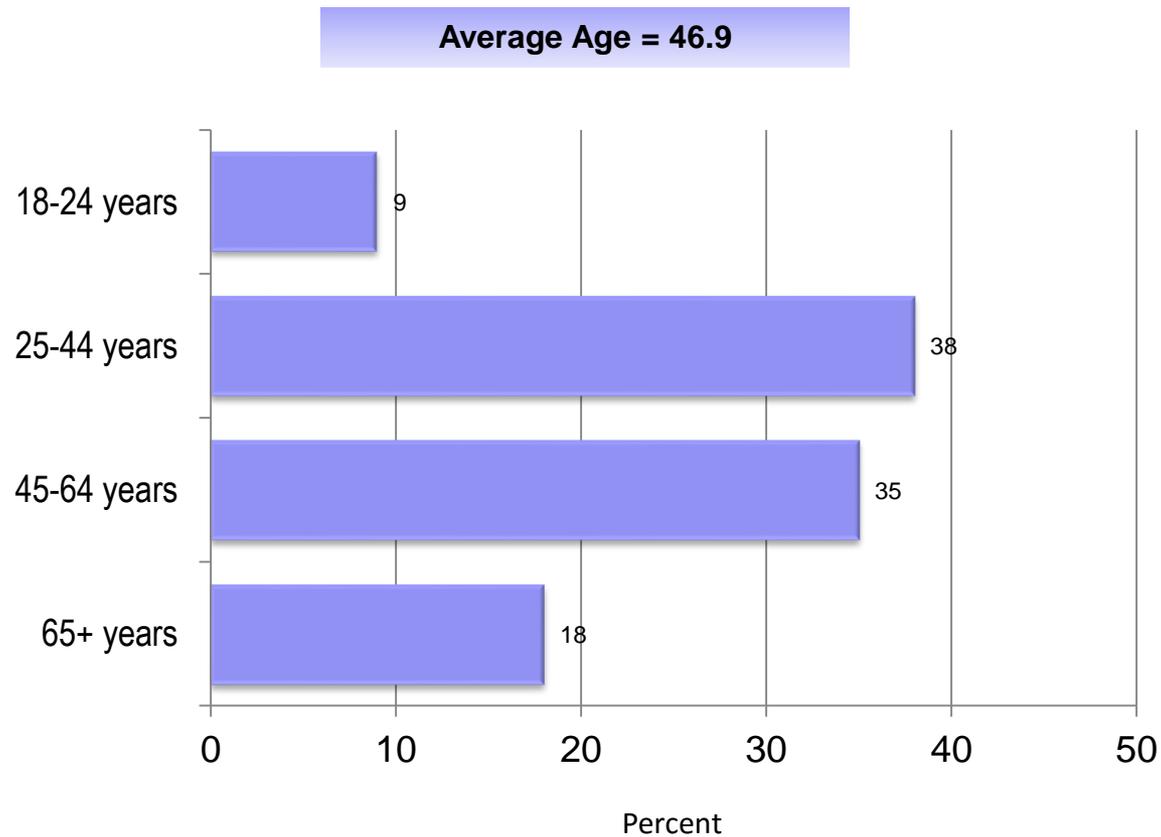


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Age



Base: Overnight Intenders*

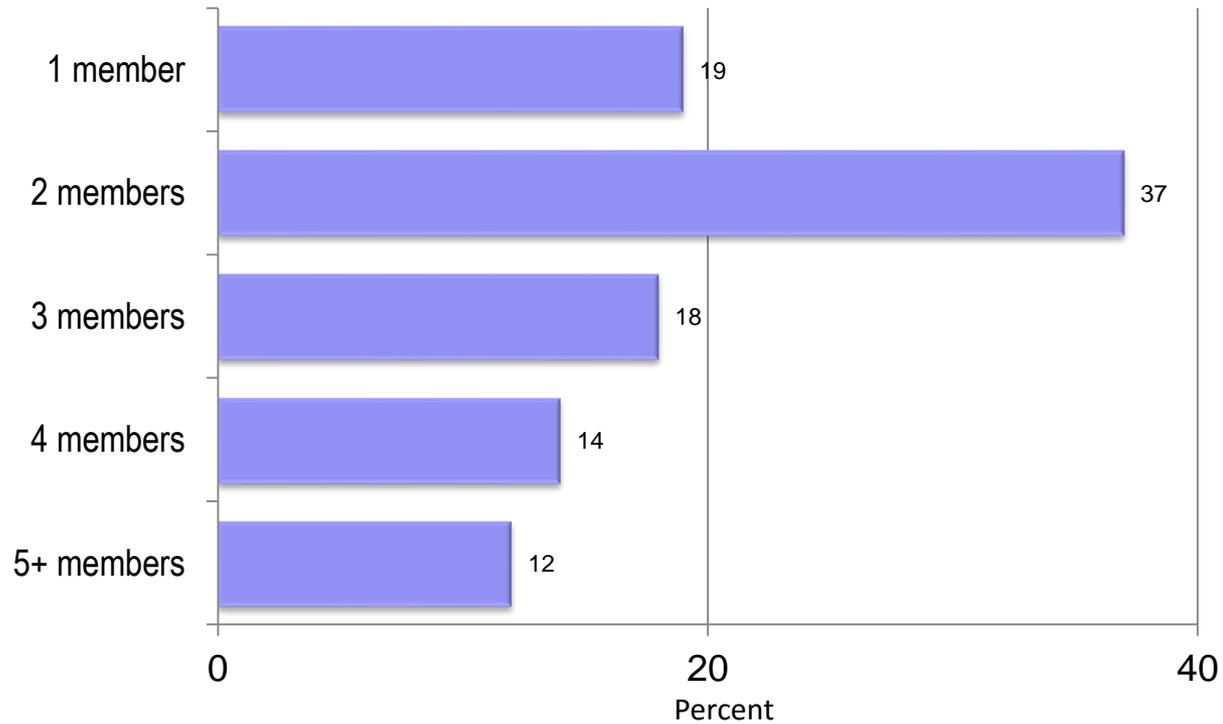


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Household Size



Base: Overnight Intenders*

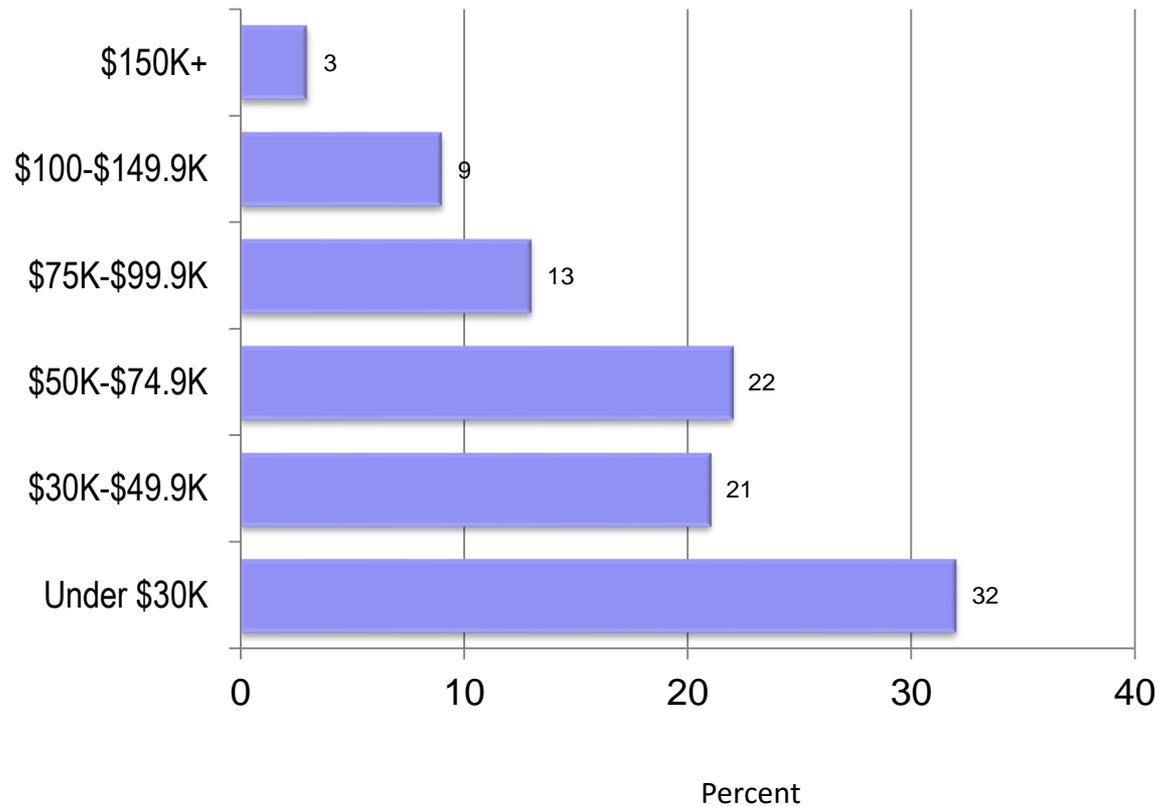


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Household Income



Base: Overnight Intenders*

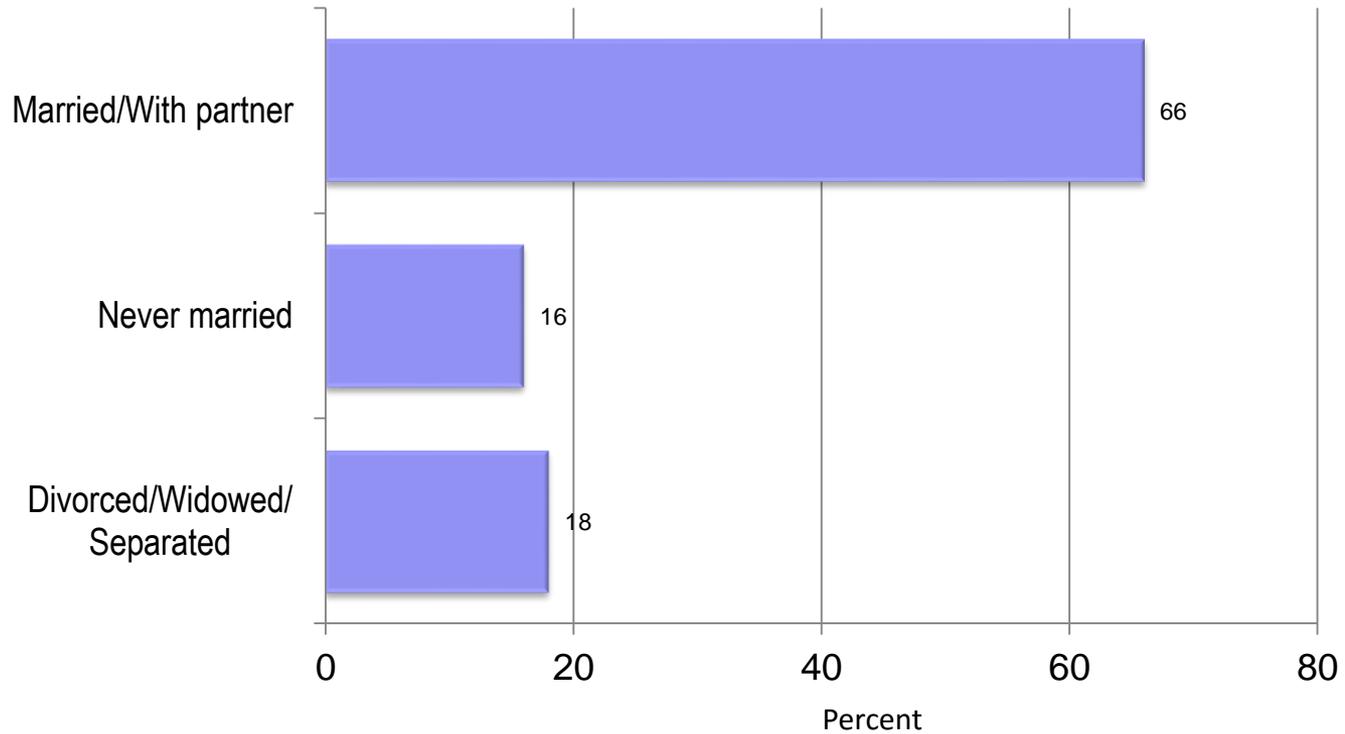


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Marital Status



Base: Overnight Intenders*

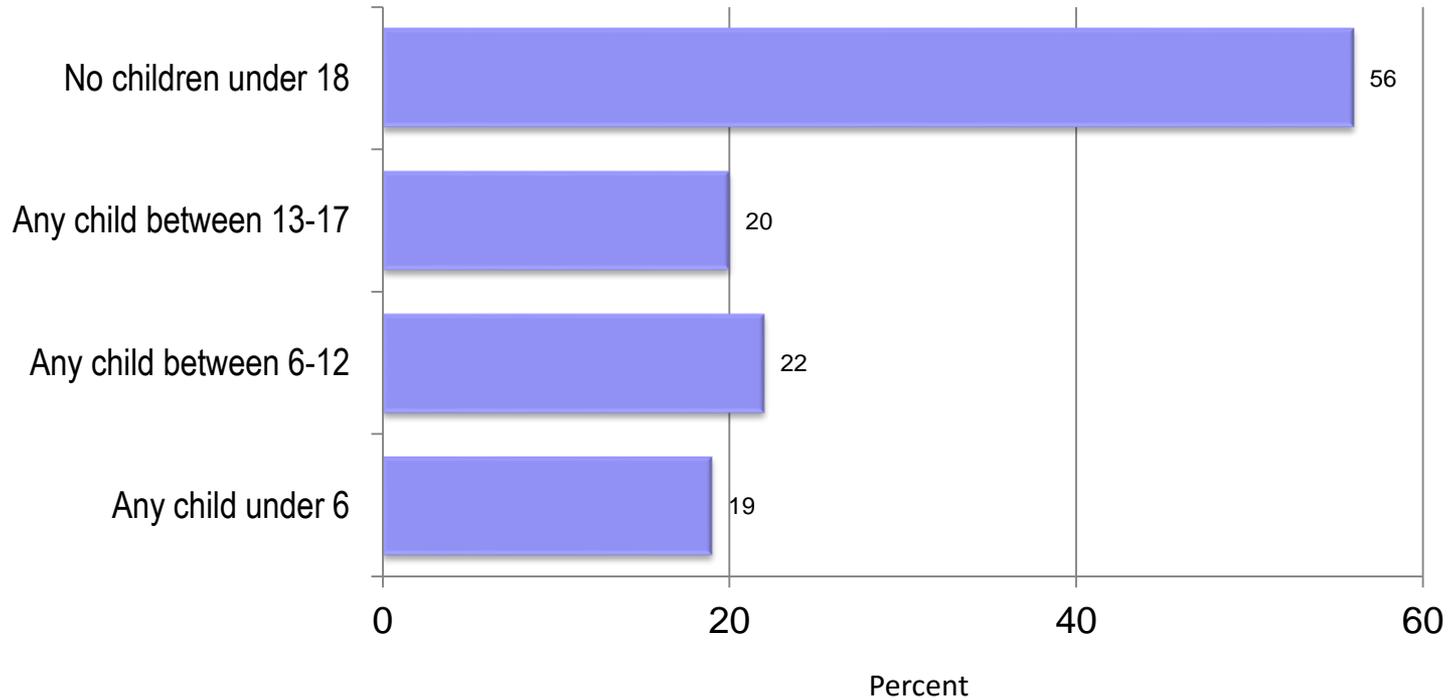


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Children in Household



Base: Overnight Intenders*

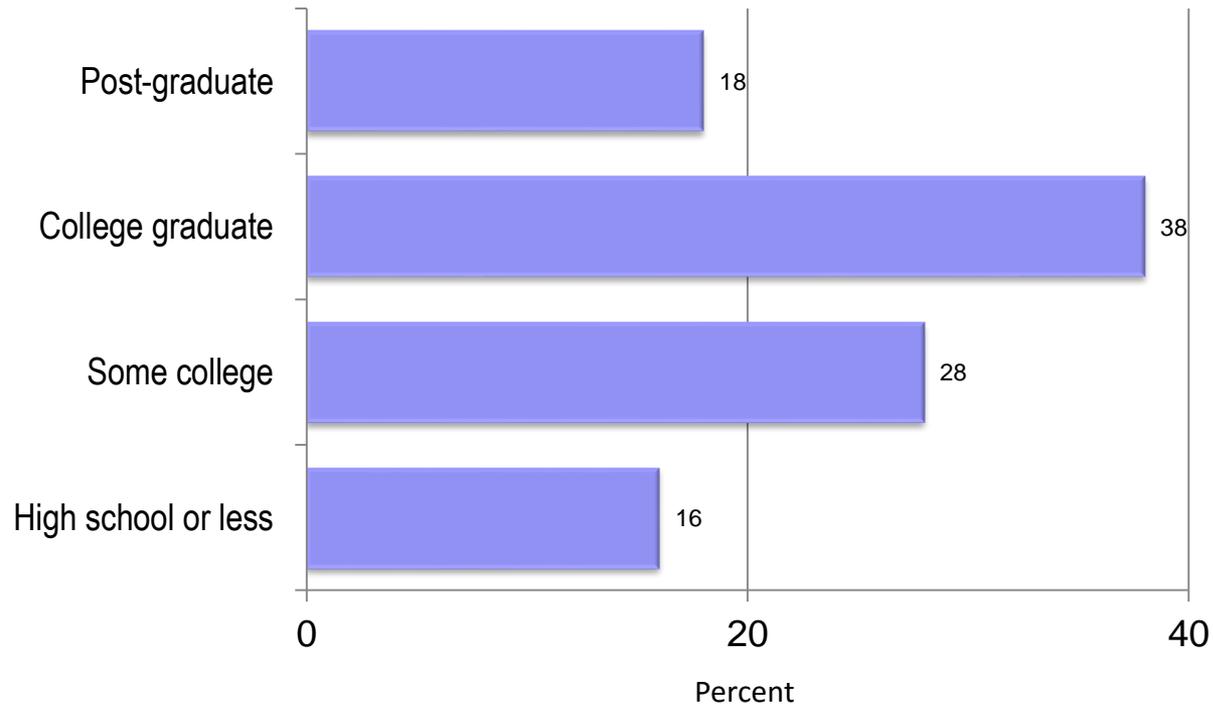


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Education



Base: Overnight Intenders*

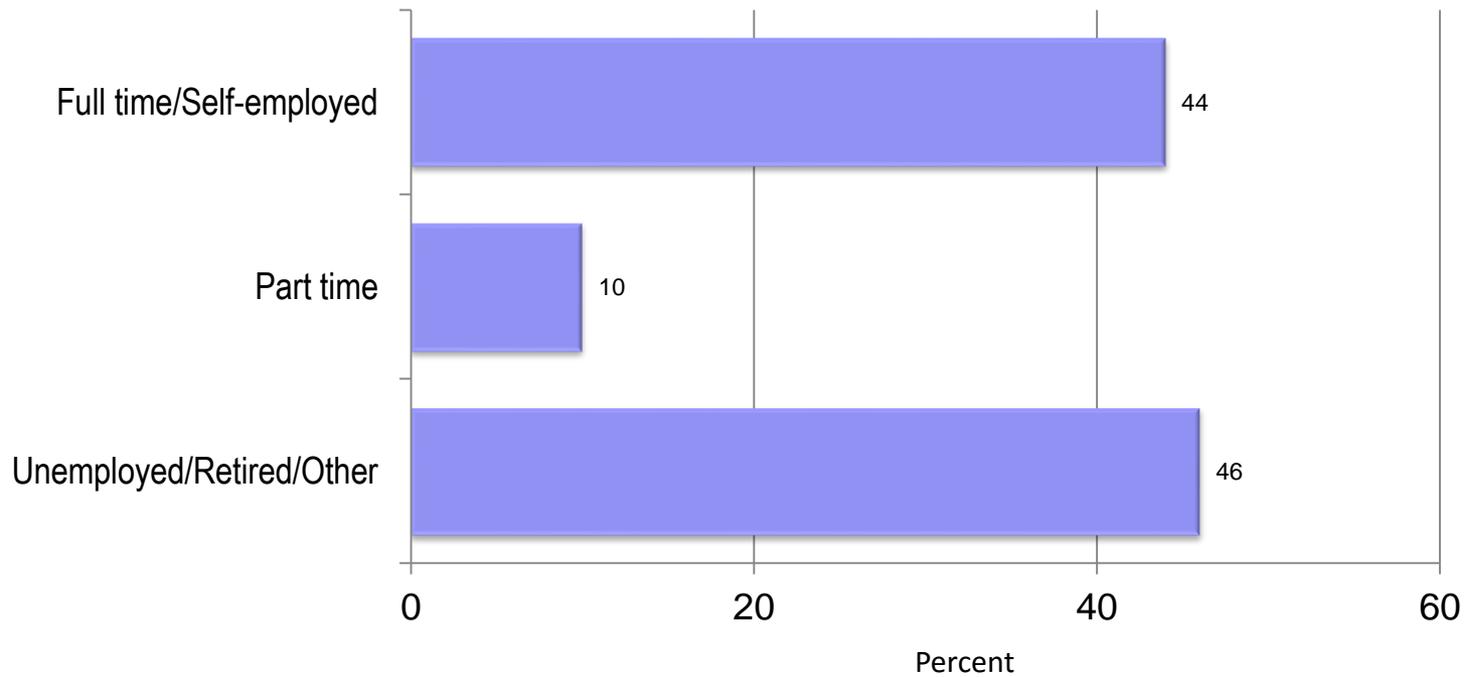


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Employment



Base: Overnight Intenders*

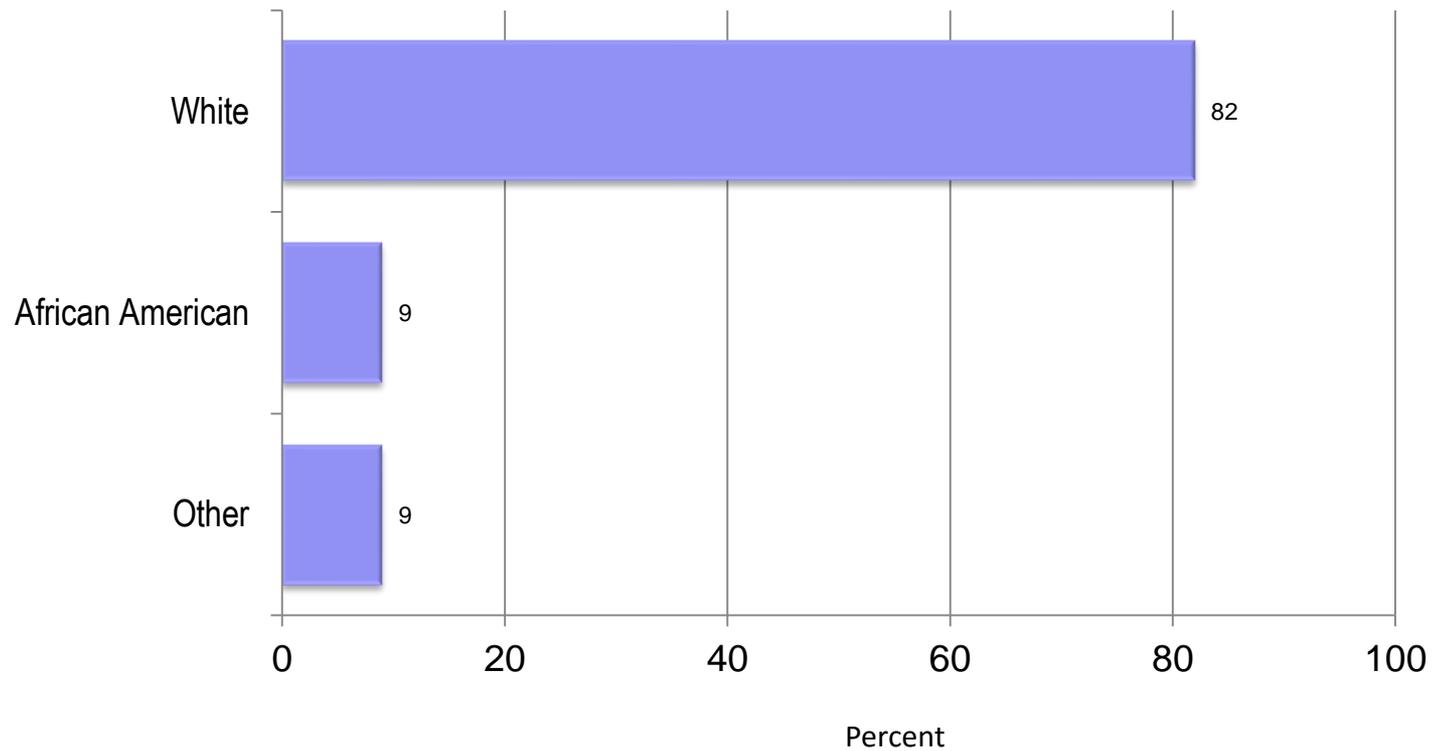


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Race



Base: Overnight Intenders*

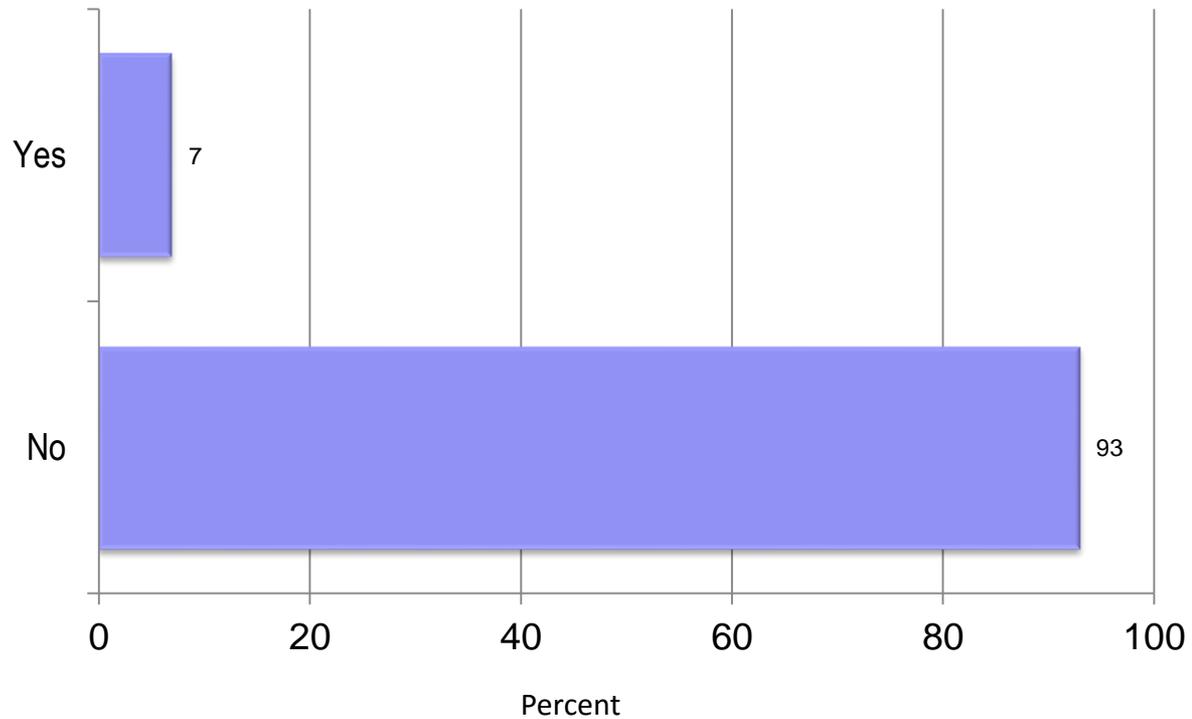


*Intend to visit Arkansas on an overnight trip "in the next 12 months"

Hispanic Background



Base: Overnight Intenders*



*Intend to visit Arkansas on an overnight trip "in the next 12 months"



Appendix: Key Terms Defined

Key Terms Defined



- ⦿ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ⦿ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- ⦿ A **Person-Trip** is one trip taken by one visitor during the travel year
 - ⦿ *Person-trips are the key unit of measure for this report.*

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** includes all trips where the main purpose was one of the following:
 - *Visiting friends/relatives*
 - *Touring through a region to experience its scenic beauty, history and culture*
 - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - *Special event, such as a fair, festival, or sports event*
 - *City trip*
 - *Cruise*
 - *Casino*
 - *Theme park*
 - *Resort (ocean beach, inland or mountain resort)*
 - *Skiing/snowboarding*
 - *Golf*
- **Business Trips:** includes
 - *Conference/convention*
 - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:

Includes all leisure trips, with the exception of visits to friends/relatives



3A's PLANNING WORKSHOP RECAP

FOR ARKANSAS PARKS & TOURISM | CJRW

08 2016

Overview

This document is a recap of three key sources:

1. Highlights from 2016 focus groups
2. Notes and Recommendations from LX's NW tour
3. Notes from the 2016 3A's Workshop
4. Examples of Infographic Needs



1. Highlights from 2016 Focus Groups

PHX | MSP | DFW

MSP and DFW showed genuine interest

Having a direct flight says AR is 'close and popular'

Similar surprise/interest in variety of adcepts

Our prospects are outdoor adventurers (+ indoor)

Travel and money mags trump passion mags

The ad campaign does a lot right but can be optimized
(tonally, breaking stereotypes, granularity)

There is an added impact with multiple executions/topics
(and/or need for an umbrella ad)

'The Natural State' needs an added layer to sway

Maps with driving distances and points of interest (top 10
must see/do/eat list) opens the door to investigation (we still
haven't resolved the 'firehose' issue)



2. Notes and Recommendations from LX's NW Tour

LR | FV | BV | ES | HS

There is not a single map that shows driving distances/times

The website trip planner should be on the home page

Photos and highlighted events do not capture the magic

Hours of operation are critical pieces of information

Not all sites are user-friendly/ready for prime time

The printed vacation guides need to be reworked to be useful

Sites of interest were missed even when in the neighborhood



3. Notes from the 2016 3A's Workshop

IDEAS : experiences

Greater Welcome Center/ AR LVG Map distribution (short term – need more visitor-relevant topics long term)

Need multiple 'executions' to showcase our variety = a collective/umbrella ad

Ensure 'on the ground' details are set for visitor satisfaction. Gain partner assistance and/or help them (secret shopper for top 10, hours of operation required, calendar with block-outs for private events/closures, etc.)



IDEAS : communications

Cater to our niche markets with specific, relevant lures

Create a visual map by activity/DMA

Showcase our accolades – combined list of ‘bragging rights’
(oldest national park, etc.)

Big idea may be variety/cluster of ‘gems’ as opposed to one thing (rejuvenation over-riding concept?) ala Utah’s Mighty 5 or Oregon’s 7 Wonders

Augment ‘The Natural State’ (i.e., The Natural _____ State.
Possible insertions: epic, music, uniquely American, motorcycle, biking, road trip, untouched, New South, etc.)



IDEAS : communications

The New Natural State (showcase how we've changed)

Fun Map 2.0

Personalized messaging

Partner with States with international airports/Ecodevo partner/Brand USA/Travel South (add keywords for us to show up)

In-flight magazines in US/NA and Overseas flights (umbrella ad would work for all)



Metrics

2% tourism tax collections (CVB's to upload own – need to finalize platform for easy/uniform tracking)

Total inquiries

Welcome Center Visitors

Deplanements

State Park Visitation (revenues)

National Park Visitation

Web traffic



Metrics

Number of Sales Actions

Total Engagement (Social)

Need Benchmarks/Historical Data

Add:

Dogs/Pets (currently 20% or 900,000) / Motorcycles

Low 'whine' factor (all quiet) / Welcome Center Research

Trends – need to add notes for campaign spikes, weather,
etc. to aid proper interpretation



Customer Journey

Consideration (Awareness to Short-List)

Conversion / Planning

Reminding/Optimizing/Anticipation

Experience/ On-site Discovery

How was your stay?

Ambassadors/WOM

Repeat Planning/Reminding

Customer Journey : Post

Conversion Study adds:

What activities did you do/see while here? Welcome center/State Park visitation? What were highlights? Did we fail to meet any expectations?

Ensure complaints/questions are answered.
How do we get insiders to watch videos to 'train' them?

Ambassadorship/WOM

Encourage/reward 'wish you were here' posts (provide postcards? rewards for engagement?) create a pass-around piece/magnetic insert, install snapchat photo outline/photo booth, rally bloggers/locals/alumni (reward engagement)



Repeat Planning/Reminding

Hotelier emails – send umbrella/map with top 10/20 funky fan favorite restaurants, bridges, local favorites (via survey)

Rotary club (welcome center trainers to speak)

AR Proud stickers

5th-7th grade AR History messages (tray liners with biographies –did you know?)

PR – famous natives (authors, Johnny Cash)

Columns – ‘the only...’, ‘the first’ (bragging rights)



New Customer Leads

Stickers in 'out of state' bike shops (bike map posters?)
Find niche groups by activity (baseball fans, gardeners, etc.)

River Market kiosk/pop up shop (t-shirts, stickers, park shirts)

Leverage homegrown AR companies such as inserted message into Stevens paychecks (e.g., JB Hunt), provide personal invitation for their annual meetings

Leverage lists of conference registrants (TaiKwonDo)
Invite them ahead of time to stay 'one more day'
Encourage hotel partners to extend rate pre and post
Deliver top 10 things to see and do in the area
via attachment, link and in-room one-sheet



New Customer Leads

Leverage sports groups/tournaments - send info on what parents can do/family can do nearby

Create tools for CVB's (by DMA)

Welcome Center sign relevant to events

Bike rental info

Little Rock Marathon

Engage Welcome Center 'Roadies' (teachers)



Goals

Options/Things to Do in DMA's – easy digestion/sharing
(one-pager at hotel desks)

Ensure partner positive experience/encourage listening and
responding/satisfaction

Make it easier to explore and navigate

-signage/wayfinding (Fed assist?)

-Celebrate/lure sideroad travel (maps/iDrive, sub-sign) –

facilitate HWY Dept + APT Love/Interaction

-Alerts (what's close by?)

-Fun map 2.0



Goals

Communicate to industry (insider) highlights/best practices/case studies (such as hours of operation)

Inspire people across a greater reach of geographies

Aggregate information (business and leisure hotels, events/attractions, eclectic lodging highlights, publish Yelp/Trip Advisor Bests, those voted Best by locals by DMA)



Next Steps

Next 2 months – by Sept Meeting

Regroup on Tableau (JDR + Brian)

APT Research Metric Benchmarking via Google Docs

Spreadsheet trial to begin with end in mind, notes for interpretation, surrounding unemployment rates, etc. (Zach)

Creative Concept Flexibility (Wade)

Bragging Rights Audit (Dalaney)

Top Yelp/Trip Advisor/#BucketList/Locals Survey by DMA
Perfect day in your neighborhood? contest/survey, Welcome Center Daytrips, meet the locals adlibs



Next Steps

Engage 'expert advisors' to keep info updated (Tiffany?)

AR Natives/AR Proud List (Jennifer, Laura, Tiffany)

Blogger Leverage (Elizabeth/Leah)

Stevens/JB Hunt Interest (Marla/Brian)

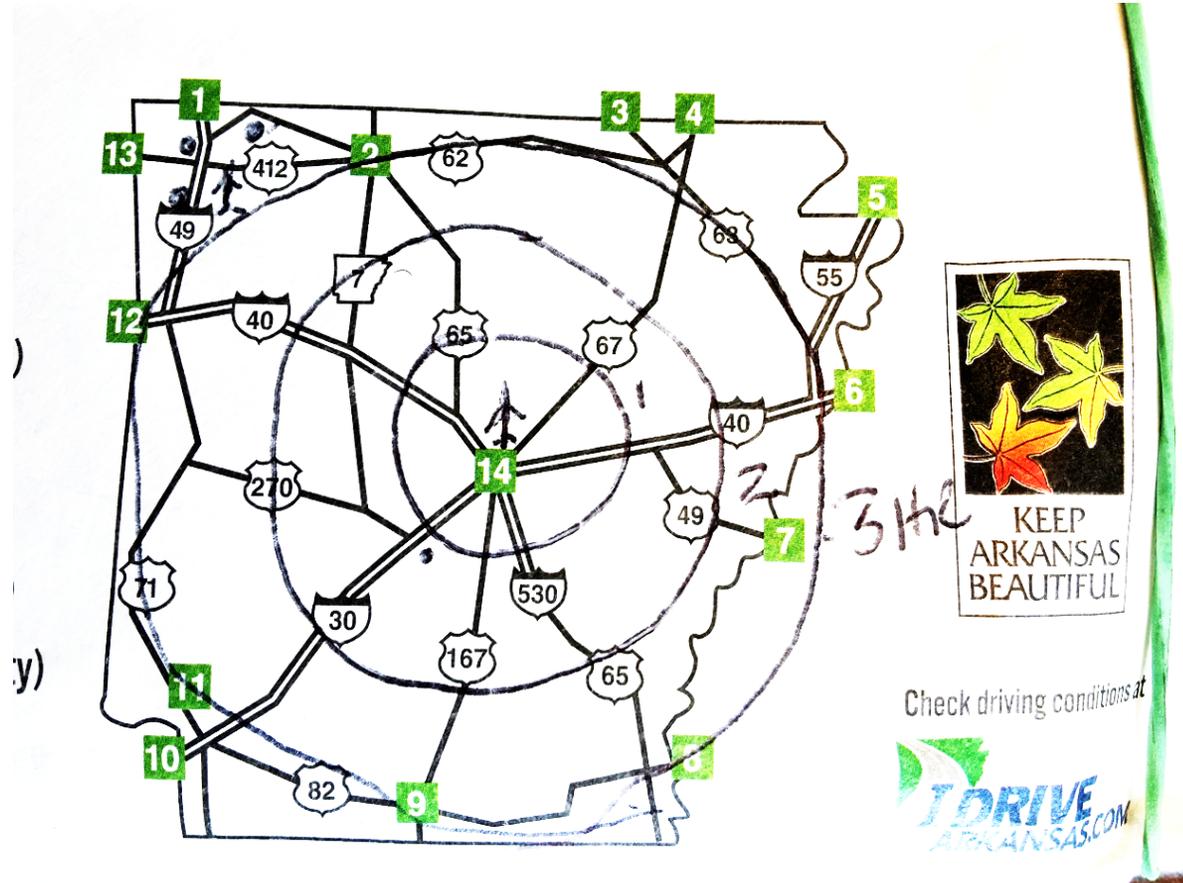
AirBnb 2% Tax Collection Practices (Shelby)

****It Ain't Braggin' If You Can Back It Up!****



4. Examples of Infographic Needs

MAP with Driving Distances



UMBRELLA ad



Needs to highlight things to do and see to get a sense of where (DMA) they may want to investigate further as opposed to topics listed here



ACTIVITY map



A visual representation of where to find activities of interest (gardens, fishing, waterfalls, top attractions) by DMA and/or for the State as a whole



PHOTO Library

Eureka Springs

×



Current website photo = boring,
1950's Woolworth in Omaha

Eureka Springs, shopping

Ideal = unique/charming/magical





lynette@wildalchemy.com

20 67 55 68 00



FOCUS GROUP TOPLINE for **ARKANSAS PARKS & TOURISM**

04 18 16

Overview

6 groups were conducted - 1 prospect group and 1 recent visitor group in each of 3 markets (PHX, MSP, DFW). DFW is our 'control' market (we include it every year) while MSP and PHX were new research markets to 'test the temperature' (so to speak) of markets a direct flight away.

36 people participated and represented a mix of ages, life-stages, ethnicities and income levels (see respondent grid attached). All were heavy travelers (several trips per year) who either had been to AR or planned to visit AR (and had been to neighboring states) within a 2-year period.

As is typical for our methodology, adcepts (one page concept) and collages were used as a platform to understand perceptions and drivers. One new adcept around temperate weather was added. In addition, the new campaign (print and tv) was shown to obtain feedback for fine-tuning our creative, media and digital strategy moving forward.



Key Findings

Overall there was great enthusiasm for Arkansas among past visitors and prospects to take a trip to Arkansas with the exception of Phoenix prospects.

This group was our most racially diverse and did not seem to have as high an income level as our other groups - which seemed to play a role - as did their need for AR to be more 'on the map' among their peers to reduce their fear of the unknown/not being welcome.

As a rule, our audience (visitors and interested prospects) consider themselves to be outdoor adventurers. That is not to say they don't have an interest in other things as well, but they are lured by the idea that they can discover adventure around every corner in AR (from a road-side BBQ stand to an antique store).

While most had an outdoor passion (mountain biking, motorcycling, hiking, etc.), many did not subscribe to magazines related to these activities. They did, however, receive or read travel-related magazines (in-flight, AAA, Sunset) and/or money magazines (those who travel often are frequently financially well-off), which may be an insight to consider when we look at our media choices to reach a broad(er) swath of our target.



Our campaign did a few things really well; overall, our spots are:

1. visually arresting
2. simple, easy to read/absorb
3. clear about where the photo was taken
4. welcoming with 'come see us'

That said, there are a few things that could help intensify our allure moving forward; we need to:

1. ensure we offer a mix of types of activities with each spot
2. include things that surprise them at a granular level (more 'Johnny Cash home or 50 Civil War sites' instead of 'historical things to see')
3. demonstrate our slower pace with the pace of video (may not be possible in our :15 but we should talk about this)
4. provide an 'umbrella' piece to cover several of the elements laid out in adcepts and/or ads in one place

On that last note, we heard similar things in previous iterations: the campaign is most effective when people get a snapshot of multiple things to do or see. The third-page addition helped provide a glimpse of this but they did not necessarily establish unique elements of Arkansas.



While direct flights help lure those looking for short couples trips, the idea that there are direct flights seems to make them think that 'Arkansas isn't that far' or reinforce the idea 'that many other people go there.' That said, given the gear they often wish to pack and not knowing exactly where they need to go to hit a good list of activities/views, driving is still king for most. Keep in mind that many drive long distances (up to 20 hours) for a new adventure (they tire of doing the same things nearby or they find an event that gives them an excuse for a road trip).

Granular information is more powerful than broad: 'finders-keepers and 2 diamonds a day found' adds interest to 'Crater of Diamonds' and upgraded lodges/pet friendly adds value to our '52 state parks', etc.

They need maps with driving distances from cities and between points of interest to get open the door to active investigation.

Top 10 lists (must sees, things to do with kids, things for couples, natural wonders, etc.) will do much of the heavy lifting of breaking through the perception of 'I have no idea what to do there.' Photos still remain our most powerful lure by breaking misperceptions of AR landscape and providing motivation ('I must see that for myself.') Weather was a strong lure in MN.



Vacation guides are now often sought out electronically v. printed for pre-planning. Printed versions are often picked up at visitors centers. Maps, coupons and 'off the beaten path' places to eat, things to do and see, etc. are the lures for both uses. We must make our current offering more portable and make our digital version more manageable by cutting back information and providing 'highlights/suggestions' as opposed to listings. We must avoid the fire-hose.

While 'The Natural State' as a line, is a strong equity for Arkansas, it does not currently hold meaning for consumers. Flip side is that it reinforces a lack of infrastructure. The 'land here' ad - while befitting The Natural State - may reinforce misperceptions that there is a lack of infrastructure/ nothing to do in Arkansas.

While our existing tagline could be used in copy, a new line could help break through old perceptions and gain new interest. Elements of 'The Epic Adventure State' could encapsulate what they're looking for, regardless of what they do or where they go and holds a promise/benefit for them as well as a new bar for partners to deliver against.

Our voice still worked with our southern hospitality charm for the most part, at times it seemed to cross a line into 'hokey' - which comes across as 'disingenuous'.



Recommendations

Fine-tune our copy brief when we gather prior to new creative development to make sure we're hitting the sweet spot.

Create an insert with a variety of highlights (top 10 by DMA) and/or create an umbrella ad to showcase our collection of accolades (to be used broadly) to augment our vertical strategy.

Our ads may also lend themselves to a collection - via Pinterest catalog or email-able PDF to 'get under their noses' with multiple visuals. Consider a viral video campaign (via YouTube) to increase sharing.

Package promotions offered via travel sites (Groupon) can get us on their radar and lure.

Shock value is still a critical element in showcasing Arkansas (surprise them). 1/3 page ads should reveal unique elements beyond the topic presented on our full page ads (for example, we show beautiful food, but does it look to be typical of what they can get anywhere or can we show something unique to Arkansas even if in the contextual background. DDD can do heavy lifting here.

Feed them #searchwords to bridge the gap to what we're offering and where they can find more info.



Sample Info for Brand Book / Insert

Manifesto

This is the land of Johnny Cash. Of James Beard Award-winning BBQ, diamonds at your feet and views that stir your soul. This is the land of Rembrandt and fancy cocktails, a worthy respite for Presidents, tycoons and gangsters. It is a place where people respect nature and play in it every chance they get. It is a place of deep history and spectacular architecture filled with memories. Where waterfalls, black butterflies and perfect silence await. This is the land of Epic adventure. This is Arkansas.

Fodder for Our Lures (Top 10 Must See/Do and/or Accolades - shocking lures as we've heard in research)

Artisan Chefs/dishes, Breweries and Wineries
The Purse Museum, Clinton Library, Crystal Bridges
Haunted Hotel, View Hikes (caves, waterfalls, etc.,
Hot Springs, Race Track, Amusement Park, 52 State
Parks, 50 Civil War Sites, Voted most livable small
city (?), Crater of Diamonds, 300 miles of mountain
biking terrain, Grand Canyon, trolley, temperate
weather, Top motorcycle road in the US (?), Best
place to 'Cabin' (?), One of the most pet-friendly
states to visit (?)



(?) = I made it up but have heard something along these lines, can we collect our accolades and chat when we gather to plan? Consumer insight may give us a filter or we could do a survey to get consumers to 'vote' on our most magnetic attractions to get beyond political static.