

# Oklahoma Tourism Segmentation

November 9, 2006



# Background and Objectives

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## **Objectives**

In an effort to better understand the consumer marketplace and create more actionable marketing communications, The Oklahoma Tourism and Recreation Department and Ackerman McQueen partnered with TNS to implement a consumer segmentation. The results from this study are discussed in this presentation.

# Methodology

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A mail survey was conducted among the TNS mail managed access panel. Consumers were recruited differentially based on where in the U.S. they lived: 60% of the sample was recruited from neighboring states around Oklahoma and 40% were recruited from outside of this area.

1,200 surveys were returned; half were primary vacation decision makers. The following table indicates the breakdown by geographic region:

| %            |  |
|--------------|--|
| 11.8         | Oklahoma   |
| 16.7         | Texas  |
| 14.1         | Kansas   |
| 9.6          | Missouri   |
| 10.2         | Arkansas   |
| 20.1         | Other Visiting Cities (Chicago, Minneapolis, Denver, Phoenix, Los Angeles, San Francisco and Indianapolis) |
| 17.6         | Other U.S.   |
| <b>100.0</b> | <b>Total</b>   |

The study was fielded during the month of August, 2006.

# Analytic Notes

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## Multi-Domain Segmentation

- A holistic approach designed to:
  - Ensure that attitudes, behaviors, and demographics all drive segmentation.
  - Produce segments of consumers that are guaranteed to be as attitudinally, behaviorally, and demographically distinct as possible.

Multi-Domain Segmentation both locates segments and ensures these segments are distinct in ways that have meaning for marketing and product development. *Note. The appendix contains more information on the approach.*

TNS worked with Ackerman McQueen and OTRD to select a segmentation scheme that met the priorities of the current initiative.

## Indexing Indicators

Throughout the presentation, key segment skews are indicated by grey squares and orange circles. These indicate:

A score 80% of Total Sample 

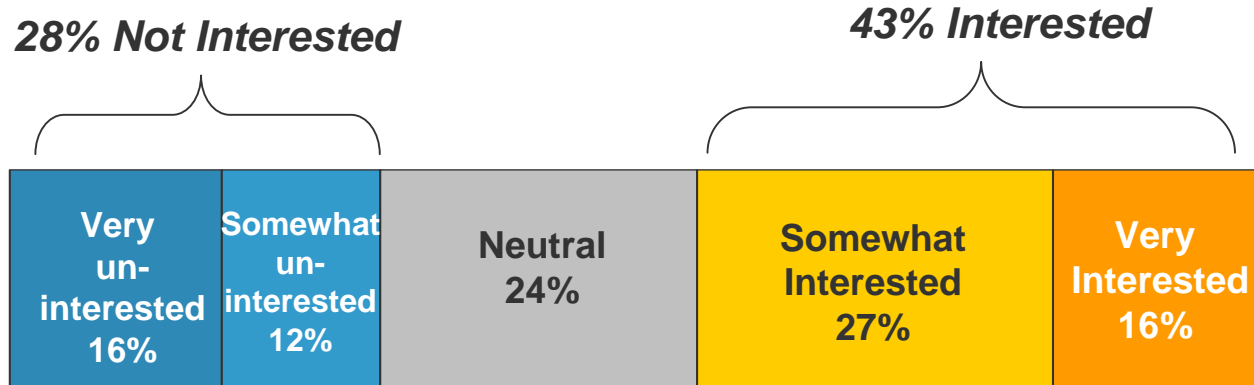
A score above 120% of Total Sample 

*Note. Only key, notable differences will be highlighted.*

# Brief Overview of the Tourist Marketplace

# Interest in Oklahoma as a Tourist Destination

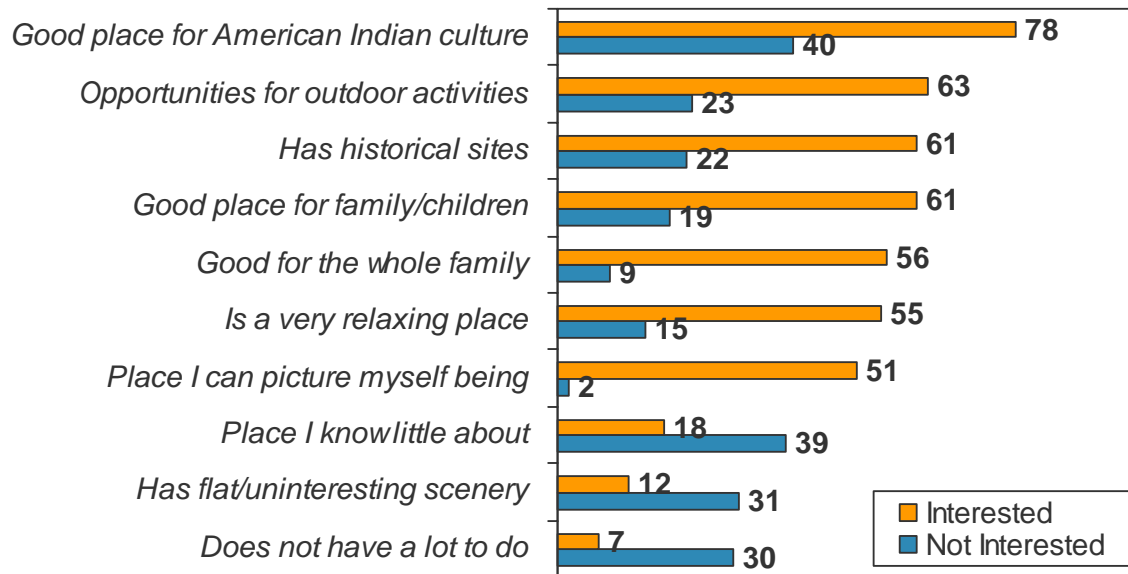
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Q: Please indicate your level of interest in visiting the state of Oklahoma.

# Interest in Oklahoma as a Tourist Destination

**Perceptions of Oklahoma (% Top 3 Box Applies)**

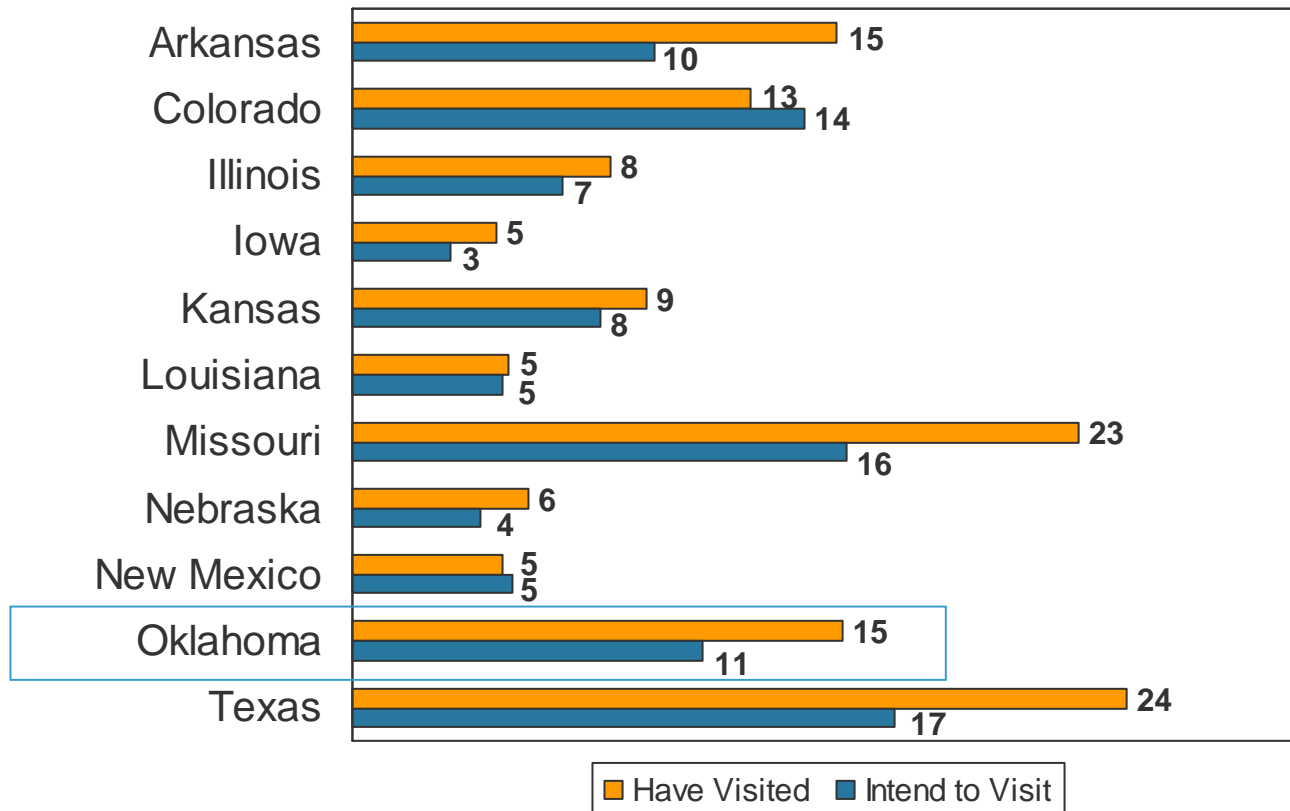


- Consumers who are interested in OK travel are interested in the outdoors, historical sites, and feel it is a good place for family.
- Those who are uninterested think that there is little to do in OK...*but admittedly, they don't know much about the state.*

Q: Please indicate the degree to which you feel each statement applies to Oklahoma....

# Where Have They Been or Do They Intend to Go?

- Texas and Missouri are the states most visited; they'd also like to go to Colorado.
- Oklahoma and Arkansas fall into the next tier.



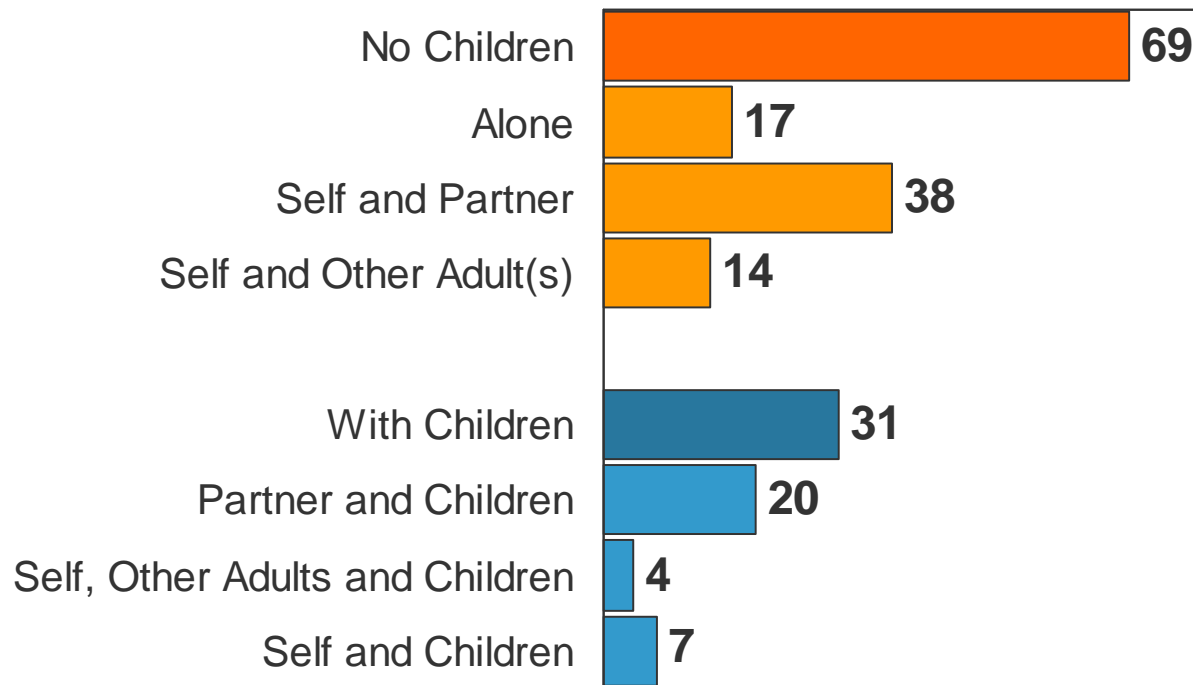
Q: Check if you have visited the state for leisure in the past 12 months, Check if you intend to visit the state in the next 12 months.

# Who Goes Along on Trips?

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- The majority (2/3) of consumers travel without children, and most of those travel with a partner or other adult.

## *Share of Past Year's Leisure Trips by Who Accompanied (%)*



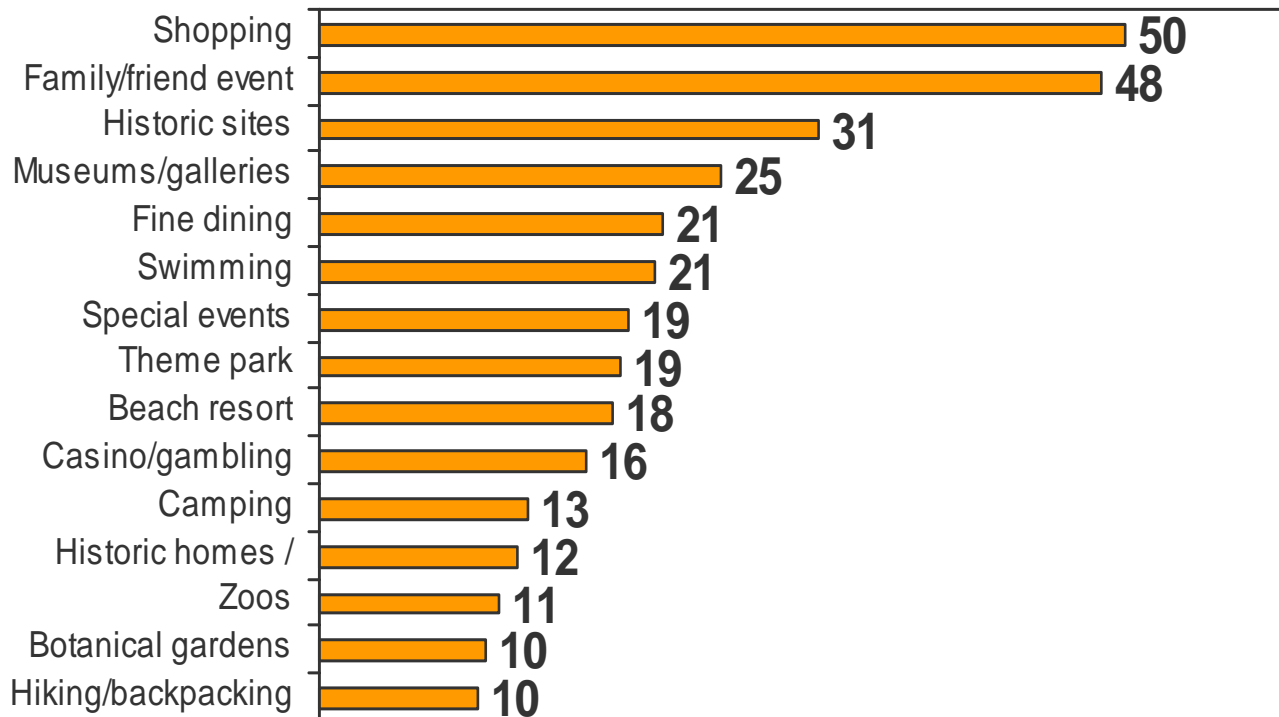
Q: For each of the following, please tell us how many leisure trips of each you took in the past 12 months.

# Total Sample: What Do They Do?

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- Shopping and visiting with family or friends are the most frequent activities on vacation.

## *Top 15 Activities Enjoyed on Leisure Trips (%)*

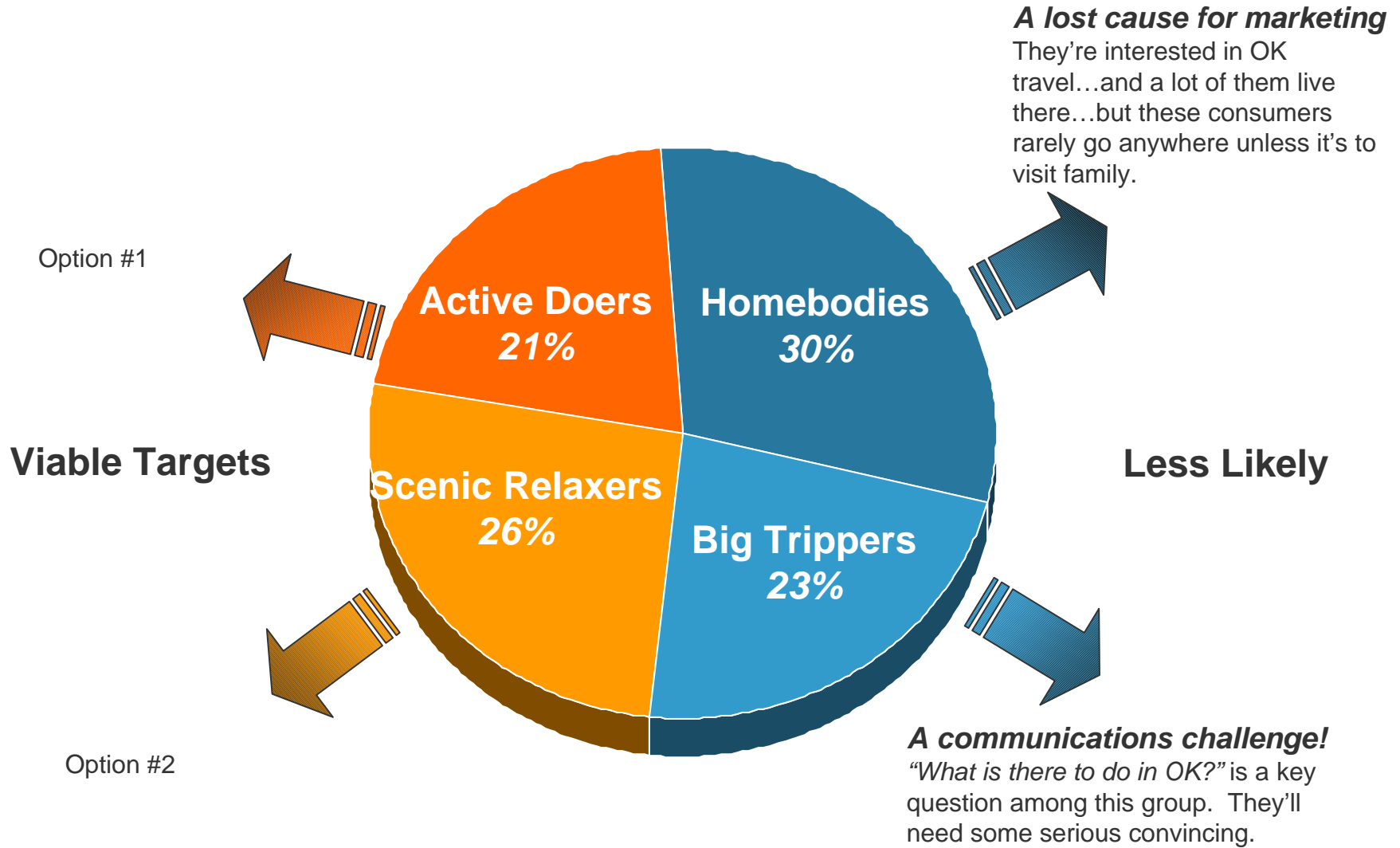


*Q: Please check off all the activities you did/visited on your leisure vacation trip(s) in the last 12 months.*

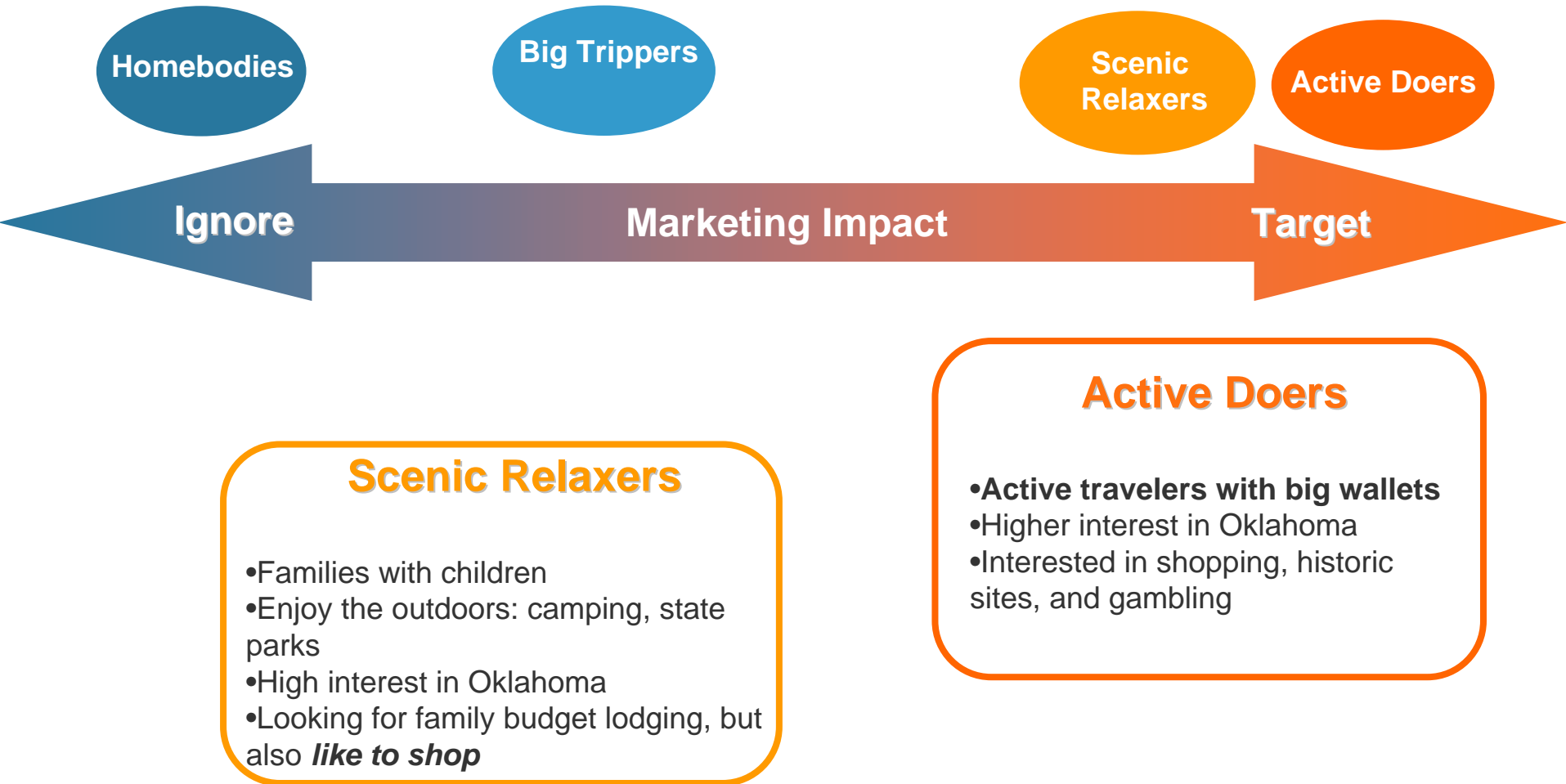
# Oklahoma Tourism Consumer Segments *Overview*



# Introducing the Four Consumer Segments



# Appeal of Segments for Oklahoma Tourism Marketing



# Appeal of Segments for Oklahoma Tourism Marketing



## Homebodies

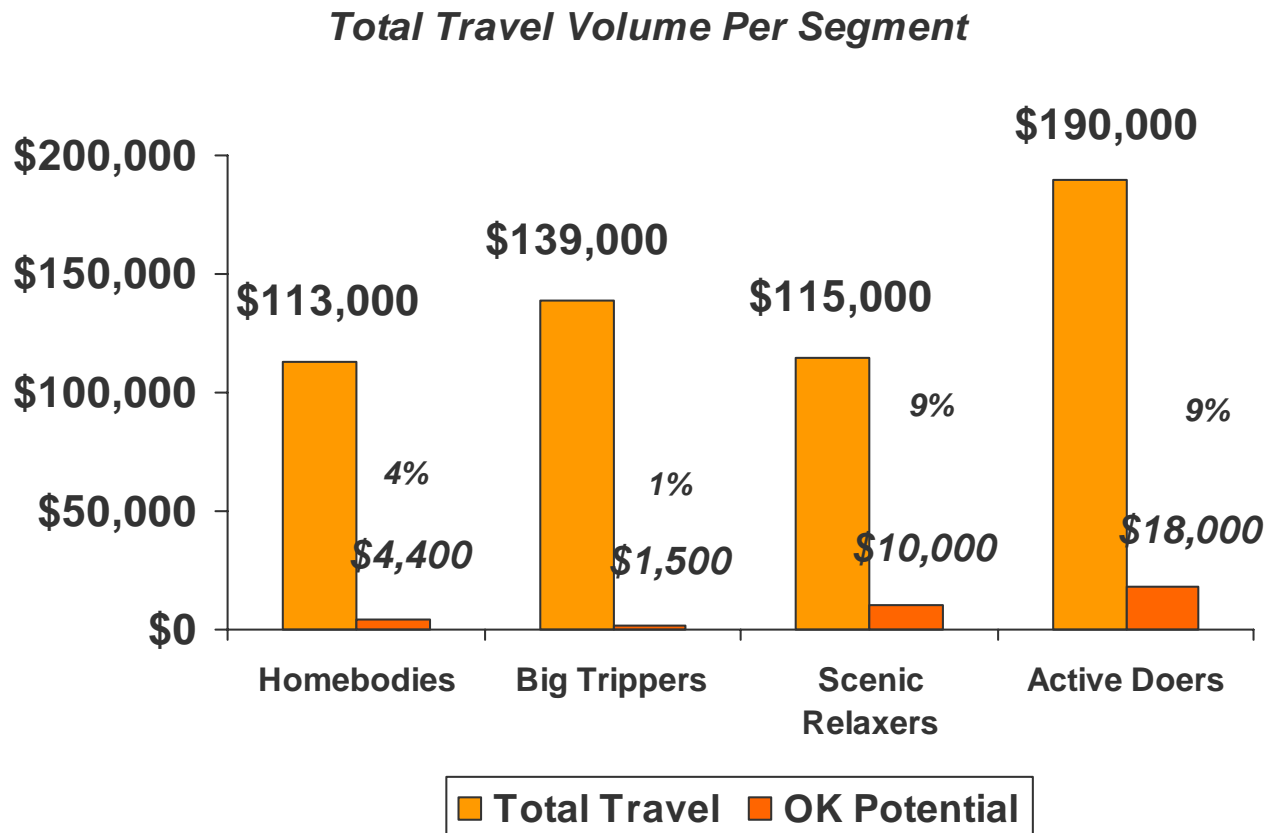
- Lower income families who travel mostly to visit family
- Aspire to travel, but do so infrequently
- Oklahoma and Texas residents are well-represented in this segment

## Big Trippers

- Well educated, high income couples
- Live in urban areas outside of the OK geographic region.
- Very low interest in Oklahoma
- Take a couple of BIG trips per year
- Not as interested in the outdoors

# Segments' Tourism Revenue Potential

- Of the two potential best targets, Active Doers represent the most potential tourism revenue for the state.



*Total Volume* = Number of Past 12 Mos. Leisure Trips X Average Amount Spent on Short & Long Leisure Trips summed across respondents in the segment.

*OK potential Volume* = Number of Intended Trips to OK in Next Year X Average Amount Spent on Short & Long Leisure Trips summed across respondents in the segment.

# Travel Frequency and Spend

•Of the two targets, Active Doers are the biggest spenders and have the highest intent to visit.

•Scenic Relaxers show high intent, but lower potential revenue.

|  | Homebodies | Big Trippers | Scenic Relaxers | Active Doers |
|--|------------|--------------|-----------------|--------------|
| <b>Travel Spend (average)</b>                      |            |              |                 |              |
| Short Leisure Trip                                 | \$403      | \$541        | \$390           | \$592        |
| Long Leisure Trip                                  | \$1,131    | \$1,728      | \$1,149         | \$1,785      |
| <b>Number of Past Year Lesiure Trips (average)</b> | 2.3        | 3.2          | 2.8             | 4.6          |
| <b>Intend to Travel to OK (%)</b>                  | 9          | 3            | 14              | 18           |
| <b>Number of Intended Trips to OK (average)</b>    | 2.1        | 1            | 2.1             | 3.9          |
| <b>Total Travel Volume for Segment</b>             | \$113,000  | \$139,000    | \$115,000       | \$190,000    |

Q: Please indicate the average total dollar amount spent by your household / number of trips taken for leisure / intent to visit / in the past / next 12 months for each state you have visited.

# Average Leisure Spending in Oklahoma

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|                 |       |
|-----------------|-------|
| Total           | \$306 |
| Active Doers    | \$442 |
| Homebodies      | \$202 |
| Big Trippers    | \$213 |
| Scenic Relaxers | \$289 |

\*\*Mean amount per HH Visit

*Q: Please indicate the total amount spent by your household in the past 12 months for the state of Oklahoma.*

# Key Findings: Overall

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- Based on this research there are two viable targets for the state.
- Active Doers are the Spring target; Scenic Relaxers are the Fall target.

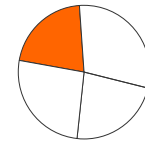
# PRIMARY TARGET

Active Doers

*Detailed Findings*

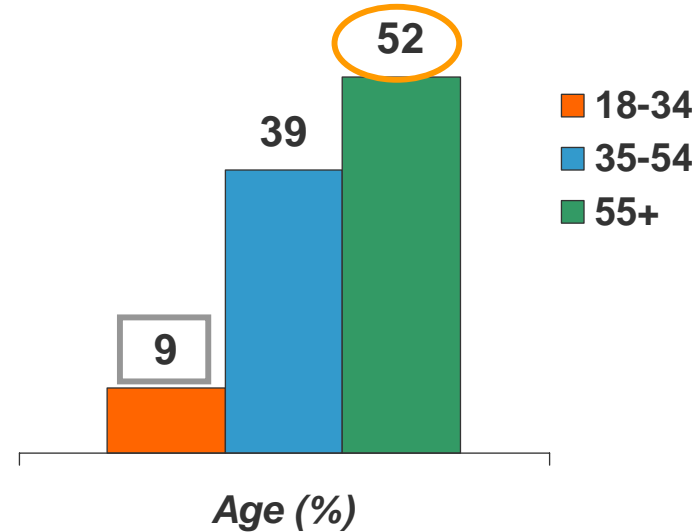


# Demographic Snapshot

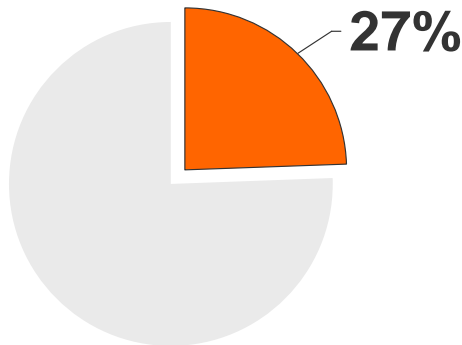


Active Doers  
21%

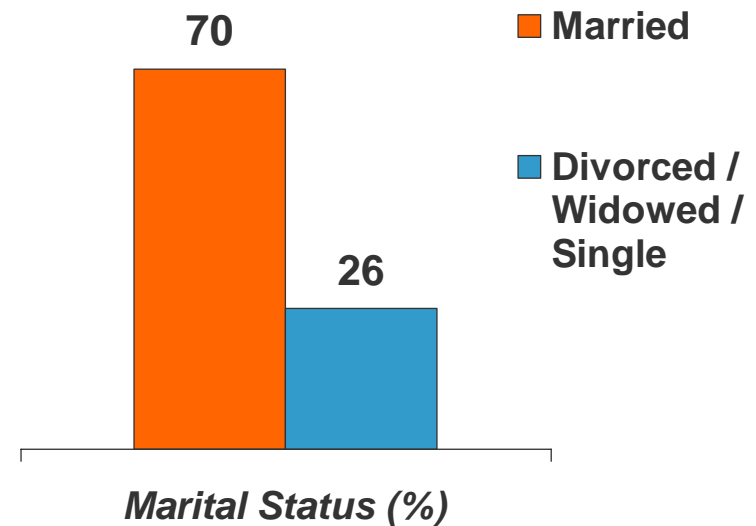
- Active Doers are more apt to be 55+. In contrast, 39% of Big Trippers, 47% of Homebodies and just 28% of Scenic Relaxers fall in that age group.
- About 1/3 of them have children in the household (similar to Big Trippers and Homebodies; 26% / 25%, but well below Scenic Relaxers at 45%.)
- Implication: Consider revolving media targeted to 35 – 64.



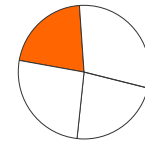
## Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.



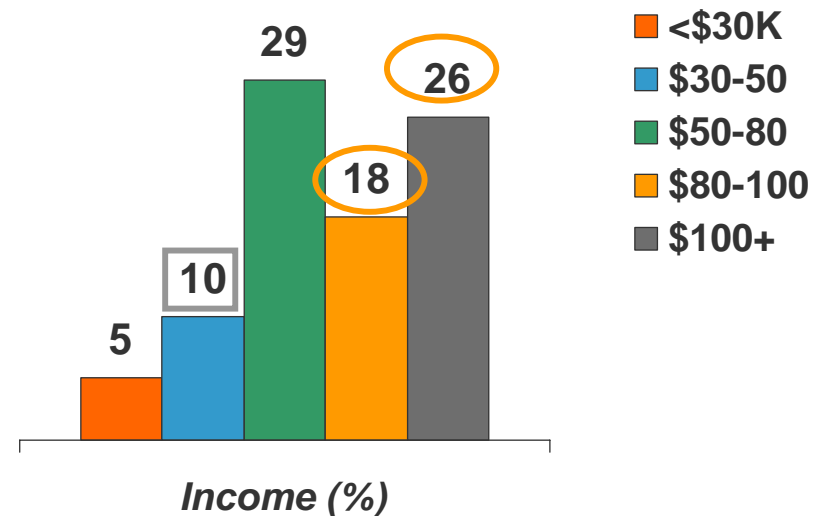
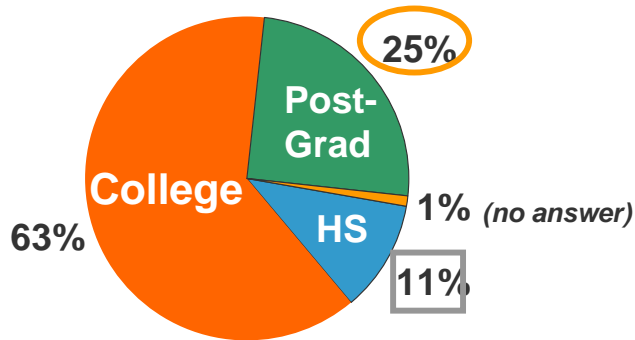
# Socio-Economic Snapshot



Active Doers  
21%

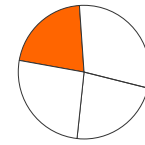
- Active Doers are among the most educated and the most wealthy of segments.
- 26% have \$100K+ incomes – higher even than Big Trippers (17%) and well above Scenic Relaxers (11%) and Homebodies (7%).
- Big Trippers tie with Active Doers on post-grad degrees (24% vs 25%).
- In contrast, Homebodies and Scenic Relaxers are more likely to be High School graduates (24% / 31%) or have some college (38% / 32%)

## Highest Level of Education



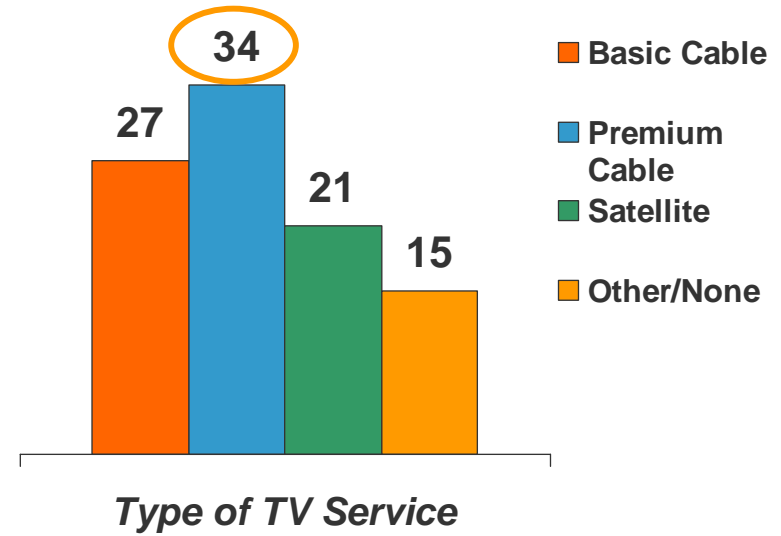
Q: Which of the following best describes the last level of school that you completed / your total household income?

# Techno-graphic Snapshot

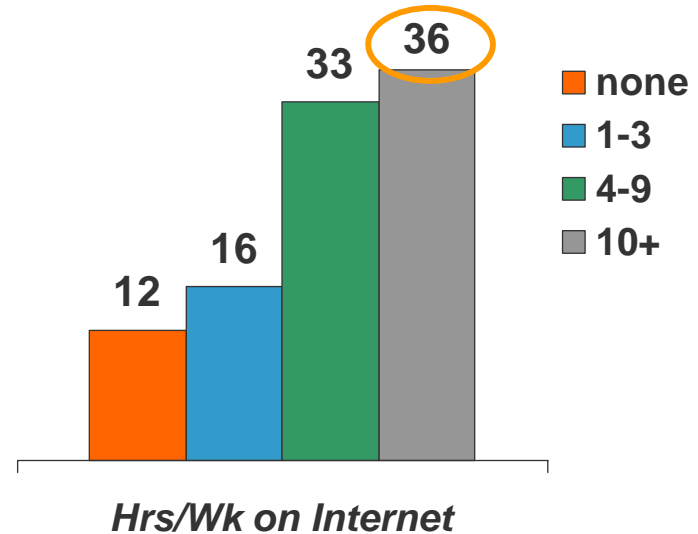
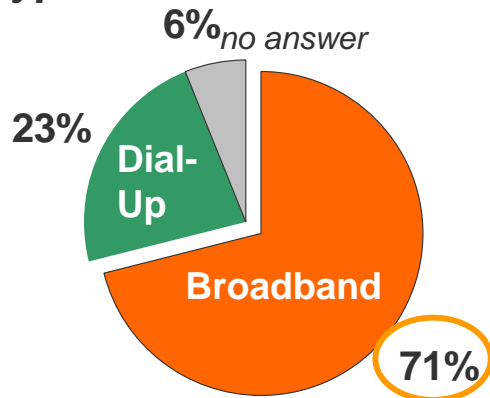


Active Doers  
21%

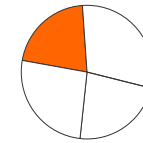
- Active Doers spend a LOT of time on the Internet...perhaps a great way to reach them...and they have broadband to boot.
- Active Doers are the most likely to subscribe to premium cable TV.



**Type of Internet Service**

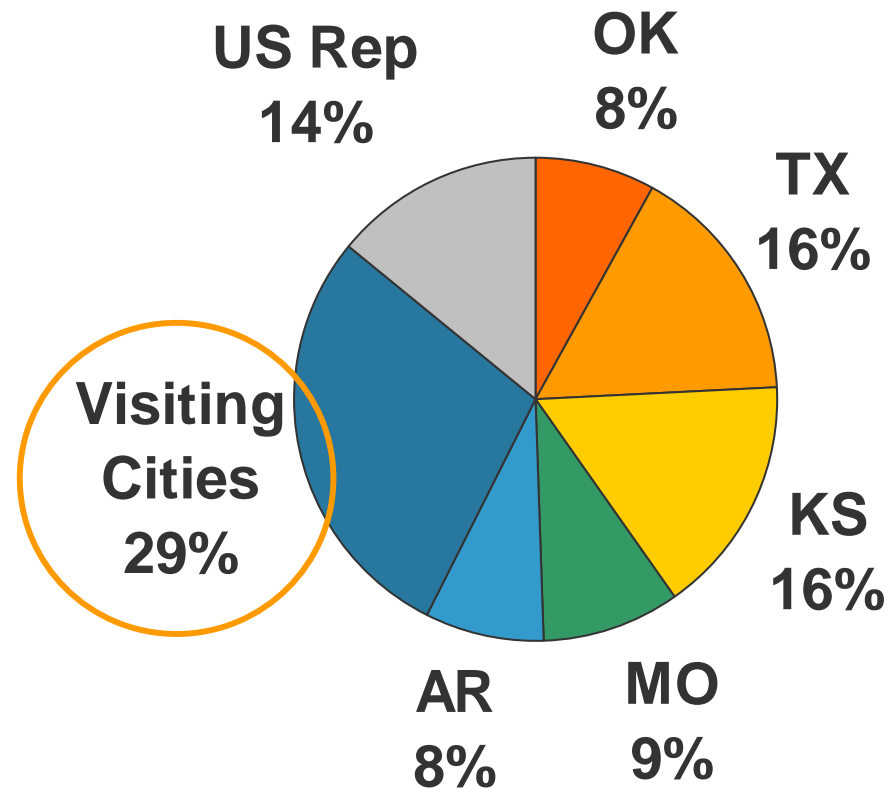


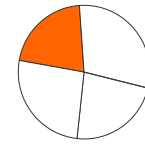
# Geographic Composition



**Active Doers**  
21%

- Close to 60% come from Texas, Oklahoma and surrounding states (with Kansas outperforming Missouri).
- Almost one-third come from other “visiting cities.”



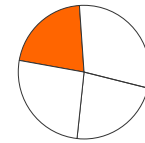


**Active Doers**  
**21%**

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# Travel Attitudes and Habits

# Travel Attitudes



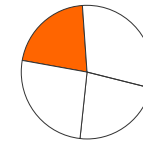
Active Doers  
21%

- These are travel enthusiasts who love to explore and discover.

|  | Top 2 Box |              |
|--|-----------|--------------|
|  | Total     | Active Doers |
| I love to travel   | 36%       | 50%          |
| A vacation is a time to see new places / new experiences | 36%       | 49%          |
| I really like to explore new places                      | 26%       | 33%          |
| Travel is a very important part of my life               | 20%       | 31%          |
| I consider travel to be one of my hobbies                | 19%       | 30%          |
| I like to go to places off the beaten path               | 18%       | 26%          |

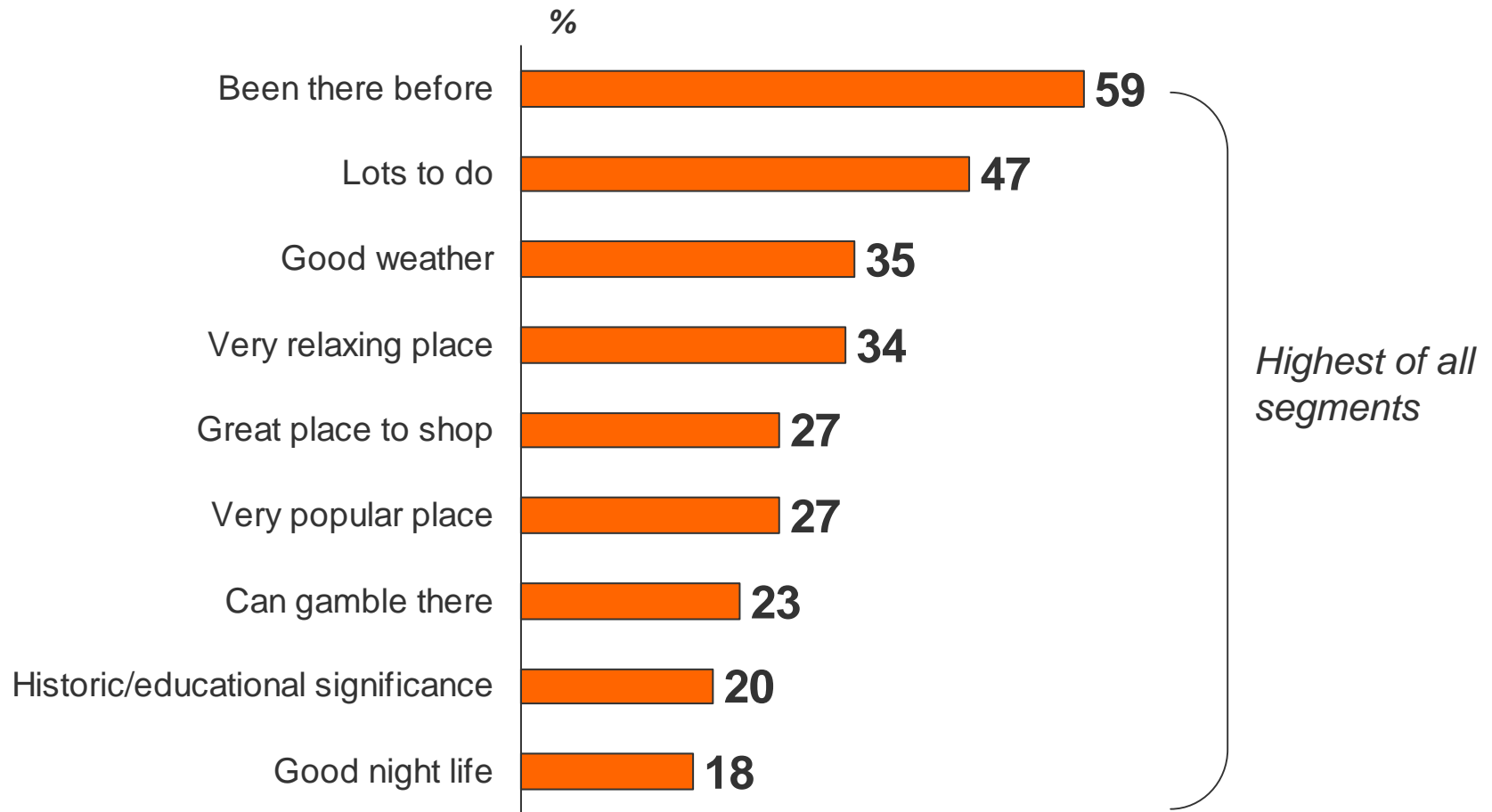
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.

# Motivations for Most Recent Leisure Trip

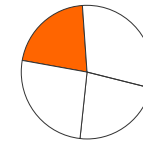


Active Doers  
21%

- What do Active Doers look for? Everything!



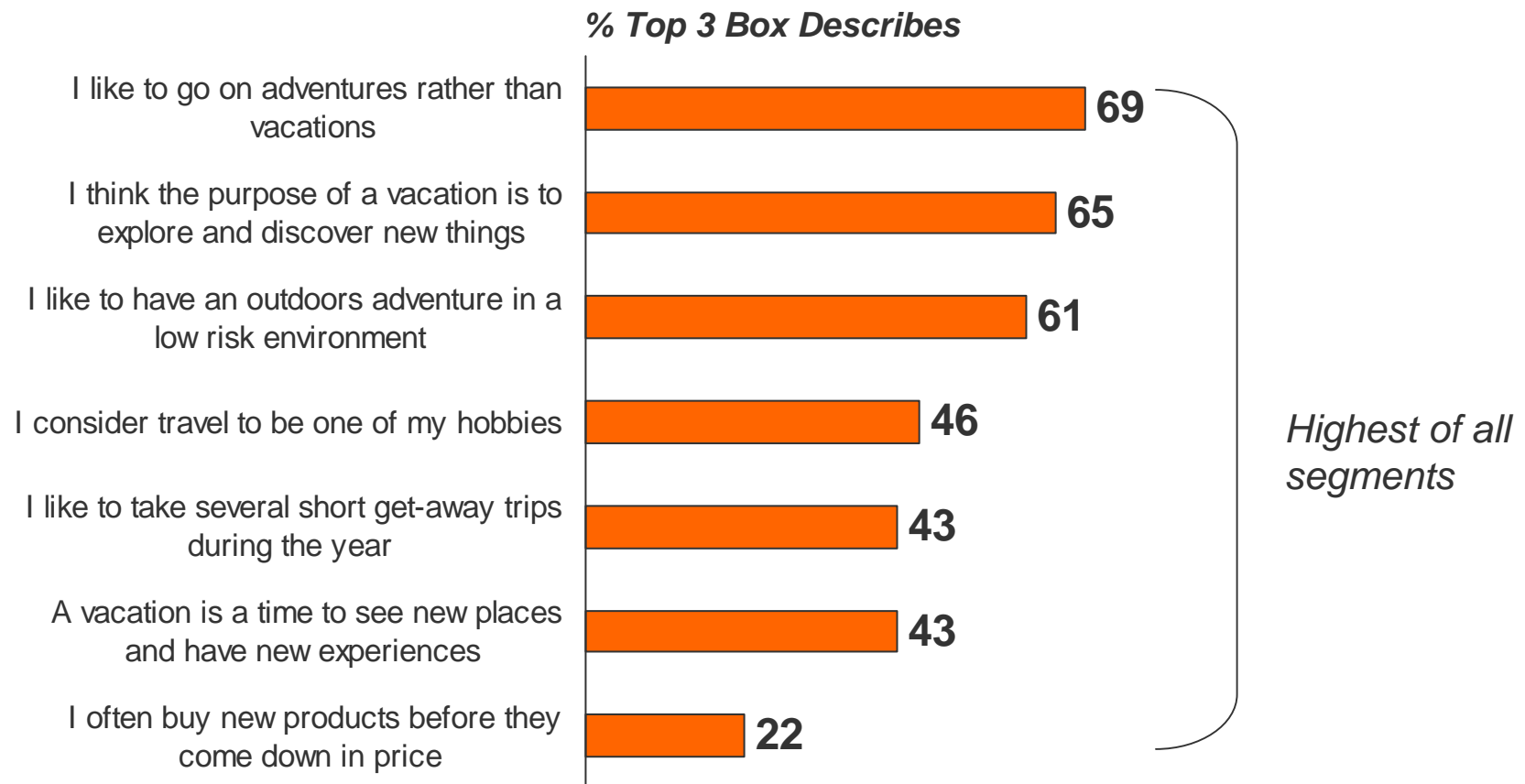
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?



Active Doers  
21%

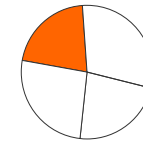
# Attitudes about Travel in General

- Active Doers are (low-risk) explorers and adventurers.
- Traveling is a hobby for them and they like to take multiple short trips every year.



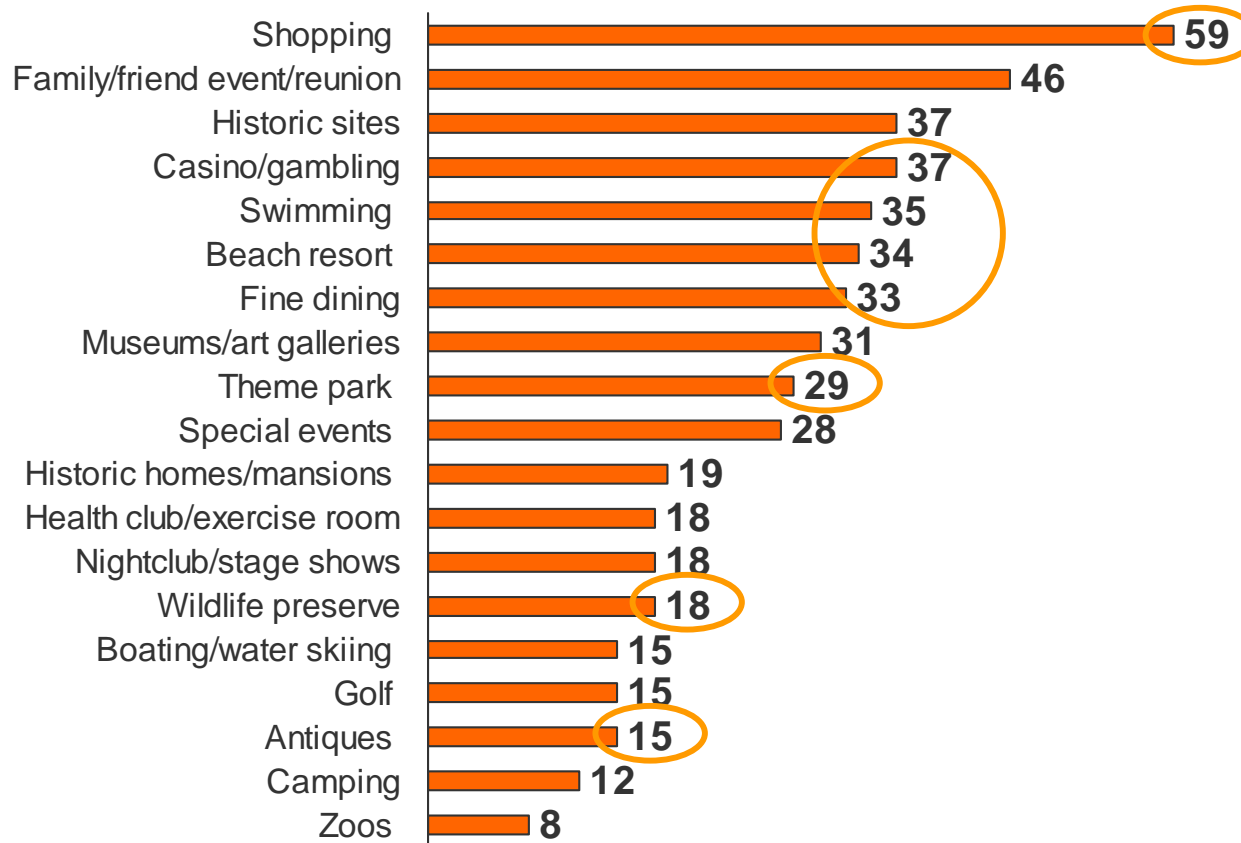
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.

# Activities on Most Recent Leisure Trip



Active Doers  
21%

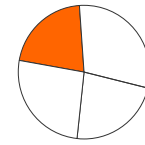
■ What do they DO on vacation? A little bit of everything.



Activities with  $\geq 15\%$  mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

# Activity Comparison



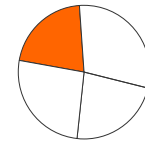
Active Doers  
21%

- They do more than any other group. They especially like to go...

|                     | Total | Active Doers |
|---------------------|-------|--------------|
| Shopping            | 50%   | 59%          |
| Swimming            | 21%   | 35%          |
| Historic Sites      | 31%   | 37%          |
| Museums / Galleries | 25%   | 31%          |
| Fine Dining         | 21%   | 33%          |
| Special Events      | 19%   | 28%          |
| Theme Parks         | 19%   | 29%          |
| Beach Resort        | 18%   | 34%          |
| Casino              | 16%   | 37%          |

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

# Activity Comparison

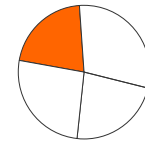


Active Doers  
21%

■ They also enjoy...

|                        | Total | Active Doers |
|------------------------|-------|--------------|
| Historic Homes         | 12%   | 19%          |
| Boating                | 9%    | 15%          |
| American Indians       | 5%    | 11%          |
| Fresh Water Fishing    | 8%    | 14%          |
| Nightclubs             | 8%    | 18%          |
| Snorkeling             | 5%    | 11%          |
| Golf                   | 5%    | 15%          |
| Wildlife Preservations | 9%    | 18%          |
| Antiques               | 9%    | 15%          |

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.



**Active Doers**  
21%

# Where have they visited?

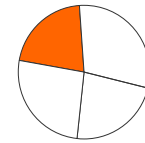
- Active Doers are most likely to have visited Texas, Missouri and Oklahoma.
- In contrast, Scenic Relaxers opt for Arkansas (26%).
- Big Trippers index high on NONE of these states – they’re big tripping; same for homebodies who are staying home.

|                 | Leisure |              | Business |              |
|-----------------|---------|--------------|----------|--------------|
|                 | Total   | Active Doers | Total    | Active Doers |
| <b>Texas</b>    | 24%     | 38%          | 6%       | 8%           |
| <b>Missouri</b> | 23%     | 26%          | 3%       | 6%           |
| <b>Oklahoma</b> | 15%     | 23%          | 4%       | 8%           |
| <b>Arkansas</b> | 15%     | 15%          | 4%       | 5%           |
| <b>Colorado</b> | 13%     | 19%          | 3%       | 5%           |
| <b>Kansas</b>   | 9%      | 12%          | 3%       | 4%           |
| <b>Illinois</b> | 8%      | 13%          | 2%       | 4%           |

Q: Check if you have visited the state for leisure / business in the past 12 months.

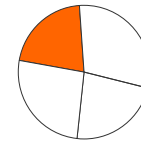
# Implication

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**Active Doers**  
**21%**

- We need to continue to market the variety of things to do in Oklahoma: unique shopping (Bricktown / Utica Square), water (swimming, boating, fishing), historic sites (Oklahoma City National Memorial), museums (Philbrook, Gilcrease, Oklahoma City Museum of Art), dining (Bricktown, Tulsa Riverwalk Crossing)...
- And determine the best ways to take advantage of this group's interest in gaming.



# How do we best reach Active Doers?

- Active Doers are more likely to watch network TV...

|                           | Total | Active Doers |
|---------------------------|-------|--------------|
| Network TV                | 59%   | 70%          |
| Basic Cable               | 33%   | 28%          |
| PBS                       | 10%   | 5%           |
| Premium Cable (HBO, etc.) | 7%    | 4%           |

- And they're more likely to own a DVR / TiVo

|   | Total | Active Doers |
|---|-------|--------------|
| Do you own a digital video recorder i.e. TiVo, DVR? | 27%   | 40%          |

Q: When you watch television do you typically watch...?  
Does your HH own a digital video recorder?

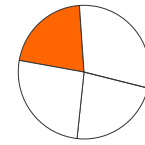
# Daypart Breakdown

- What are they watching? Active Doers are more likely to watch early evening programming – probably news.

|   | Total   |         | Active Doers |         |
|---|---------|---------|--------------|---------|
|   | Weekday | Weekend | Weekday      | Weekend |
| <b>Early Morning<br/>(before 9am)</b>   | 41%     | 27%     | 44%          | 29%     |
| <b>Late Morning<br/>(9am – noon)</b>    | 16%     | 25%     | 15%          | 20%     |
| <b>Early Afternoon<br/>(noon – 3pm)</b> | 17%     | 23%     | 18%          | 22%     |
| <b>Late Afternoon<br/>(3pm – 5pm)</b>   | 20%     | 27%     | 18%          | 28%     |
| <b>Early Evening<br/>(5pm – 8pm)</b>    | 61%     | 52%     | 69%          | 57%     |
| <b>Primetime<br/>(8pm – 11pm)</b>       | 71%     | 68%     | 72%          | 73%     |
| <b>Late Night<br/>(11pm – 1am)</b>      | 17%     | 24%     | 15%          | 24%     |

Q: What time(s) of day do you typically watch television on the weekdays?

# Daypart Breakdown



**Active Doers**  
21%

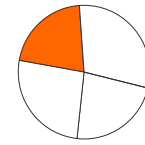
- Compared to other key targets, they're also more apt to watch early morning – again, probably news.

|                              | Active Doers |         | Homebodies |         | Big Trippers |         | Scenic Relaxers |         |
|------------------------------|--------------|---------|------------|---------|--------------|---------|-----------------|---------|
|                              | Weekday      | Weekend | Weekday    | Weekend | Weekday      | Weekend | Weekday         | Weekend |
| Early Morning (before 9am)   | 44%          | 29%     | 38%        | 24%     | 44%          | 30%     | 40%             | 26%     |
| Late Morning (9am – noon)    | 15%          | 20%     | 22%        | 26%     | 13%          | 27%     | 15%             | 25%     |
| Early Afternoon (noon – 3pm) | 18%          | 22%     | 18%        | 24%     | 13%          | 24%     | 18%             | 23%     |
| Late Afternoon (3pm – 5pm)   | 18%          | 28%     | 25%        | 26%     | 17%          | 27%     | 21%             | 28%     |
| Early Evening (5pm – 8pm)    | 69%          | 57%     | 60%        | 53%     | 61%          | 51%     | 56%             | 47%     |
| Primetime (8pm – 11pm)       | 72%          | 73%     | 35%        | 59%     | 79%          | 74%     | 71%             | 69%     |
| Late Night (11pm – 1am)      | 15%          | 24^     | 19%        | 25%     | 17%          | 24%     | 18%             | 23%     |

Q: What time(s) of day do you typically watch television on the weekends?

# Favorite TV Shows

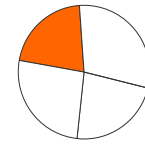
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**Active Doers**  
**21%**

- While answers were scattered and bases are small, Active Doers are twice as likely to watch:
  - 60 Minutes
  - American Idol
  - Antiques Roadshow
  - The Closer
  - Extreme Makeover
  - Crossing Jordan
  - The Office
  
- And are also above average viewers of:
  - CSI
  - Lost
  - Monk
  - Law & Order
  - Survivor

*Q: Which 3 television programs do you watch on a regular basis?*



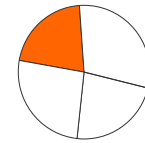
**Active Doers**  
**21%**

# Favorite TV Shows: Other Segments

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- In contrast:
  - Scenic Relaxers
    - Amazing Race
  - Big Trippers
    - 24
  - Homebodies
    - 7<sup>th</sup> Heaven

*Q: Which 3 television programs do you watch on a regular basis?*



# Music Formats on Radio

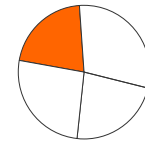
- News and Adult Contemporary is how to reach them. They're also more apt to listen to talk radio and jazz.

|                    | Total | Active Doers |
|--------------------|-------|--------------|
| News               | 26%   | 28%          |
| Adult Contemporary | 17%   | 26%          |
| Jazz               | 10%   | 14%          |
| Talk               | 15%   | 21%          |

- In contrast, Scenic Relaxers like Country (44% Scenic Relaxers vs. 37% Total).
- Big Trippers score higher on Classical (20% vs. 16% Total) and NPR (17% vs. 13% Total).
- There are no real differences for Homebodies.

Q: Which of the following music formats do you usually listen to on the radio?

# Magazines



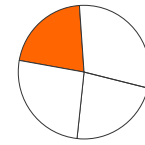
Active Doers  
21%

- They were given a list of publications and asked to check their three favorites. They're above average readers of:

|                          | Total | Active Doers |
|--------------------------|-------|--------------|
| AAA Publications         | 17%   | 27%          |
| AARP The Magazine        | 24%   | 33%          |
| Better Homes and Gardens | 17%   | 21%          |
| Good Housekeeping        | 15%   | 22%          |
| Ladies Home Journal      | 8%    | 15%          |
| Midwest Living           | 6%    | 3%           |
| Redbook                  | 5%    | 9%           |
| Southern Living          | 7%    | 10%          |
| Travel & Leisure         | 3%    | 7%           |
| US News                  | 2%    | 4%           |
| Vanity Fair              | 2%    | 4%           |

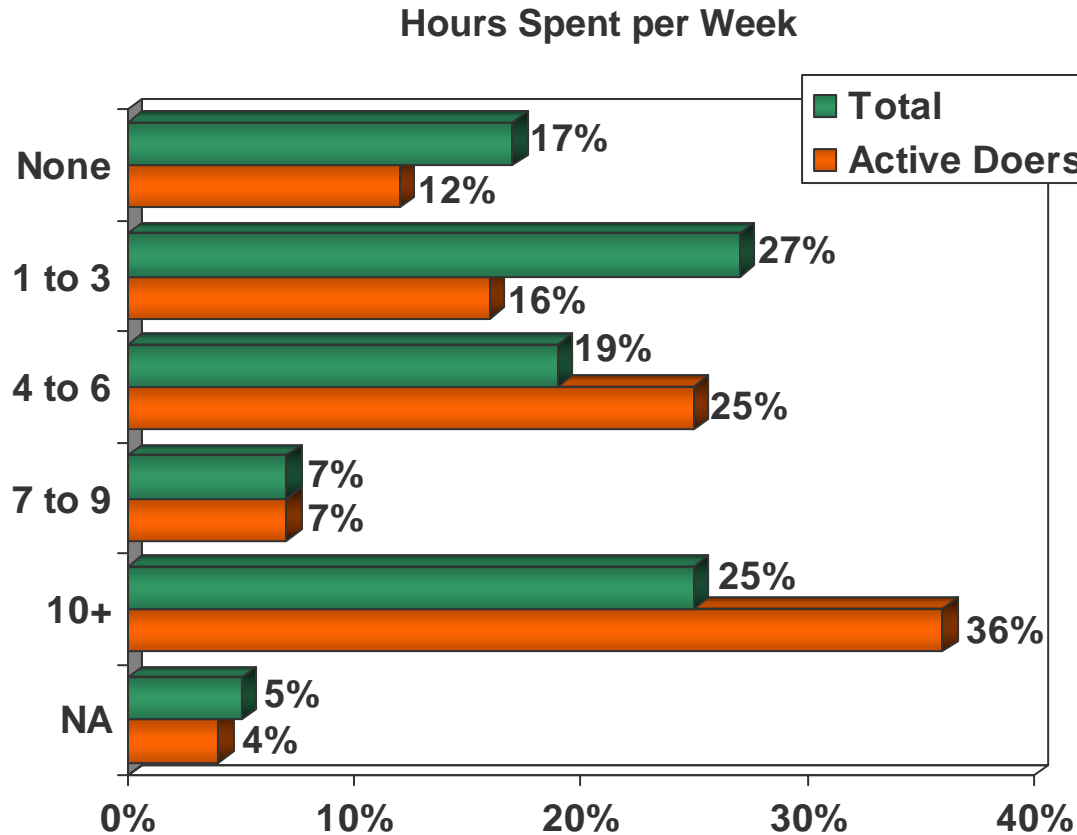
Q: Which 3 magazines do you read on a regular basis?

# Internet Usage



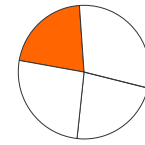
Active Doers  
21%

- They're very active users of the Internet. Over one-third of Active Doers spend 10+ hours a week on the Internet. That compares to 25% of Scenic Relaxers, 30% of Big Trippers and just 12% of Homebodies who spend 10+ hours.



Q: On average, how many hours a week do you spend on the Internet?

# Internet Access



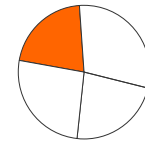
**Active Doers**  
**21%**

- Active Doers and Big Trippers are more likely to have Broadband.

|           | Active Doers | Homebodies | Big Trippers | Scenic Relaxers |
|-----------|--------------|------------|--------------|-----------------|
| Broadband | 71%          | 44%        | 70%          | 67%             |

Q: At home, which type of Internet service do you subscribe to?

# Which Websites?



Active Doers  
21%

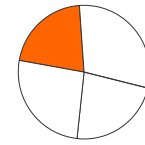
- They were asked which three Websites they visited most. Yahoo! led for Active Doers.

|              | Total | Active Doers |
|--------------|-------|--------------|
| Yahoo!       | 20%   | <b>23%</b>   |
| Google       | 12%   | 13%          |
| eBay         | 7%    | <b>13%</b>   |
| MSN          | 8%    | <b>12%</b>   |
| Other "News" | 3%    | 5%           |
| Fox News     | 1%    | 2%           |

- In contrast, Big Trippers were more apt to mention CNN and financial websites (13%). Homebodies curl up with a book and Amazon.com. Scenic Relaxers check Hotmail.

Q: Which 3 websites do you visit on a regular basis?

# Internet



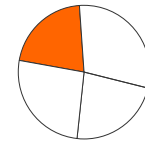
Active Doers  
21%

- Active Doers are also far more likely to read travel-related emails.

|                      | Total | Active Doers |
|----------------------|-------|--------------|
| Airline              | 21%   | 39%          |
| Hotel Chain          | 13%   | 22%          |
| Destination          | 8%    | 18%          |
| Online Travel Agency | 7%    | 11%          |
| Cruise Line          | 10%   | 24%          |
| Car Rental           | 3%    | 7%           |
| None                 | 49%   | 37%          |

Q: Do you regularly read email communications from any of the following sources?

# Newspaper



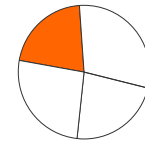
**Active Doers**  
21%

- Active Doers are more likely to read the newspaper on a daily basis.

|                           | Active Doers | Homebodies | Big Trippers | Scenic Relaxers |
|---------------------------|--------------|------------|--------------|-----------------|
| <b>Everyday</b>           | 50%          | 43%        | 46%          | 41%             |
| <b>Almost Everyday</b>    | 15           | 14         | 11           | 14              |
| <b>1 – 3 times / week</b> | 15           | 9          | 8            | 15              |
| <b>Only on Sunday</b>     | 8            | 10         | 13           | 14              |
| <b>Seldom</b>             | 9            | 15         | 20           | 15              |
| <b>Never</b>              | 2            | 3          | 2            | 1               |

Q: How often do you read a newspaper?

# Media Trends

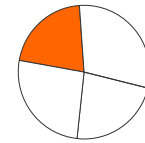


**Active Doers**  
**21%**

| <b>“The amount of time I’ve spent...”</b> | <b>Total</b> | <b>Active Doers</b> | <b>+ / -</b> |
|---|--------------|---------------------|--------------|
| Online has increased                      | 32% →        | 44%                 | +12%         |
| Reading magazines has increased slightly  | 32% →        | 36%                 | +4%          |
| Watching TV has decreased slightly        | 53% →        | 57%                 | +4%          |

Q: Which of the following describes your media habits in the past 12 months?

# Ad Recall



**Active Doers**  
**21%**

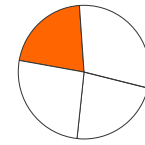
- Active Doers are generally more aware of most states' advertising

|            | Total | Active Doers |
|------------|-------|--------------|
| Texas      | 37%   | 44%          |
| Arkansas   | 36%   | 43%          |
| Missouri   | 33%   | 35%          |
| Oklahoma   | 29%   | 31%          |
| Colorado   | 23%   | 30%          |
| Louisiana  | 20%   | 23%          |
| New Mexico | 17%   | 21%          |
| Kansas     | 13%   | 14%          |
| Illinois   | 9%    | 11%          |
| Nebraska   | 8%    | 8%           |

*Q: For each of the states below, please indicate if you recall noticing any advertising for the state in the past 6 months.*

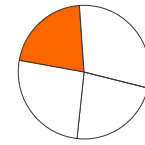
# Summary

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**Active Doers**  
**21%**

- Active Doers represent a very viable target for the state of Oklahoma.
- Continuing to show the variety of activities – how much there is to do – is critical.
- Based on this research, a spot with greater inclusion of gaming and casinos in the state would be of direct interest to this target.
- Appointment Network TV and Internet are the best ways to reach this target.
- Sunday editorial is also an excellent way to reach Active Doers.



**Active Doers**  
**21%**

# Key Findings: Spring Active Doers

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- Creative should continue to emphasize the variety of “active” things to do in the state, including casinos.
- The demo should be modified to 35 – 64 years of age.
- Early morning and early evening news and select prime are good TV dayparts to reach this audience.
- Because of the propensity to be online, online should continue to play a major role in the marketing mix.
- AAA, AARP and traditional women’s publications are excellent media vehicles to reach this group.
- Earned media should also focus on “active doer” activities and options to reach these newspaper readers efficiently.

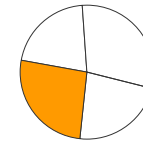
# SECONDARY TARGET

## Scenic Relaxers

*Detailed Findings*

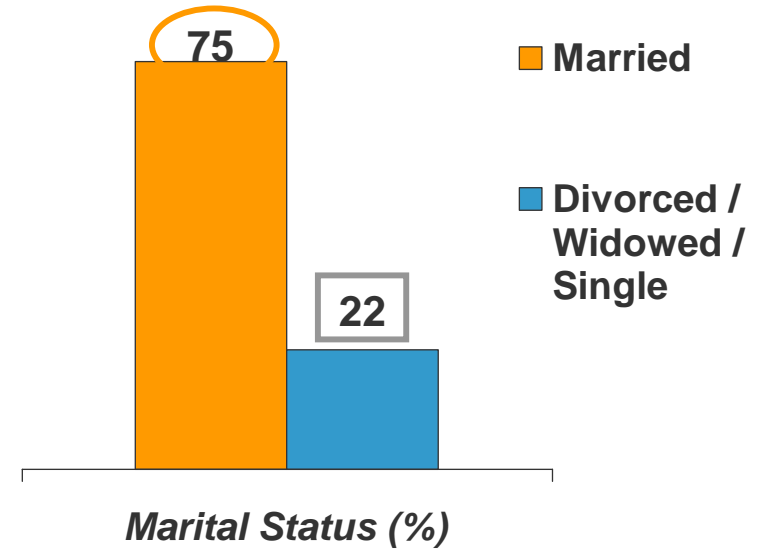


# Demographic Snapshot

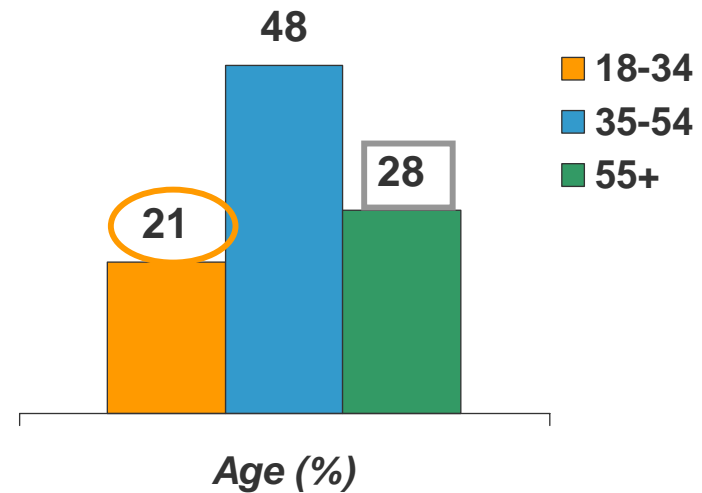
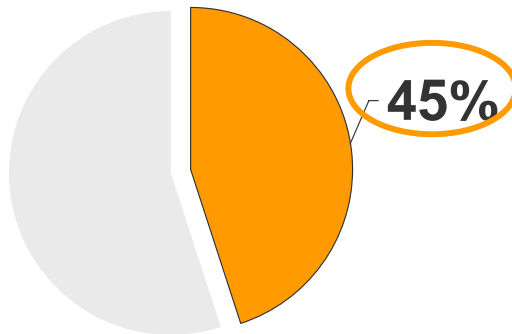


Scenic Relaxers  
26%

- Young and married
  - Consistently, they are MUCH more likely than any other segment to have children.

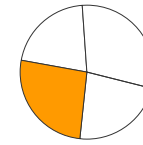


## Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

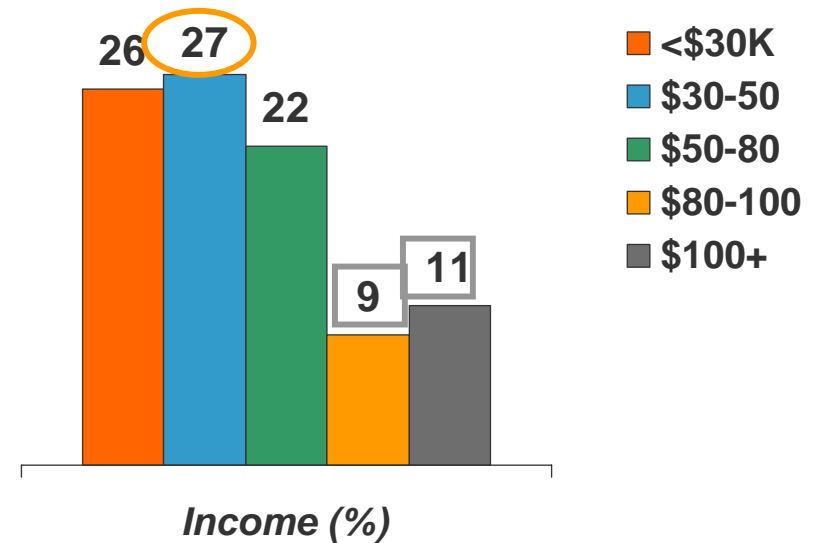
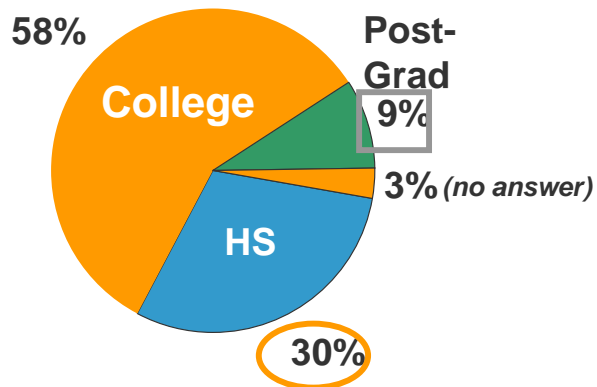
# Socio-Economic Snapshot



Scenic Relaxers  
26%

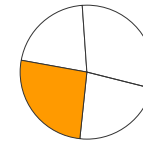
- Scenic Relaxers are more likely to have only a high-school education.
  - They also have smaller incomes than other segments.

**Highest Level of Education**



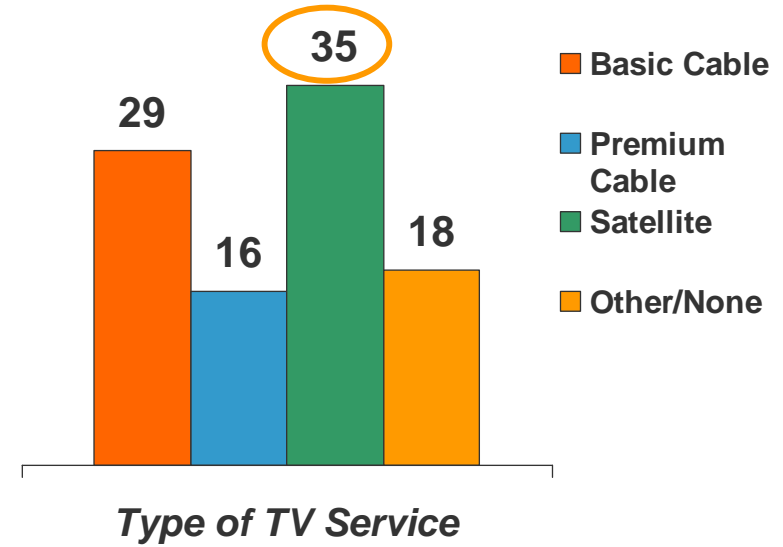
Q: Which of the following best describes the last level of school that you completed / your total household income?

# Techno-graphic Snapshot

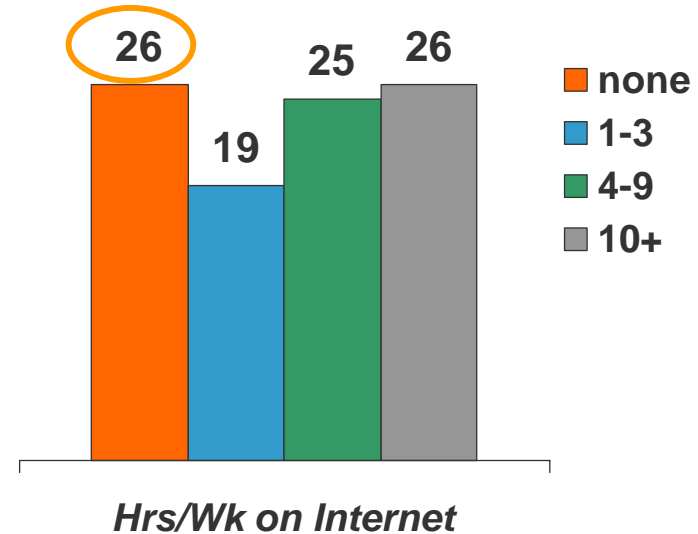
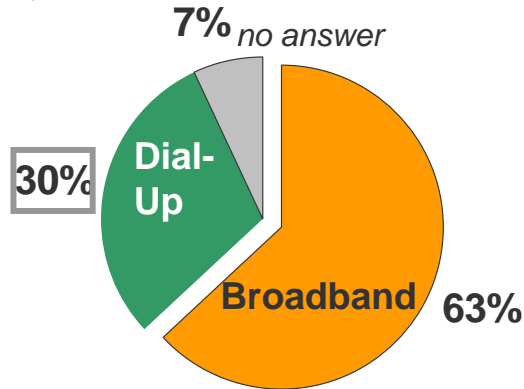


Scenic Relaxers  
26%

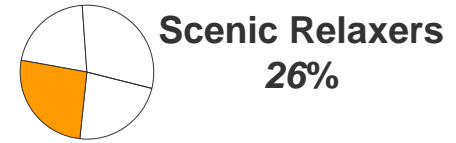
- Scenic Relaxers are the most likely to be dial-up users. Over one-quarter spend no time on the Internet.
- They're also far more apt to be satellite users – a reflection of where they live.



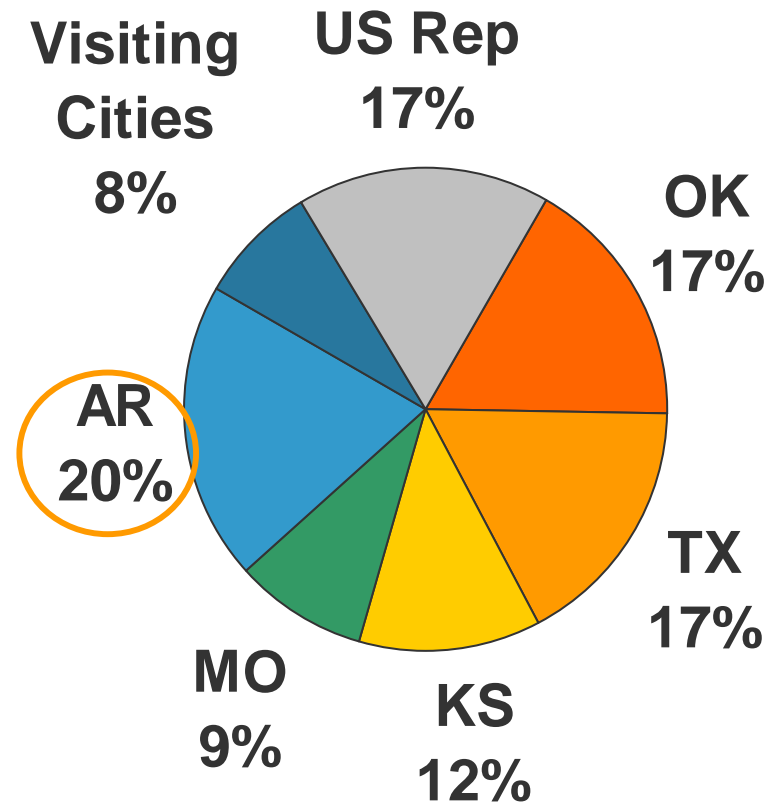
**Type of Internet Service**

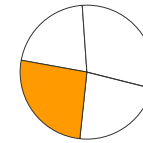


# Geographic Composition



- Scenic Relaxers are comprised of a sizeable number of Oklahomans as well as a largely disproportionate share of Arkansas residents.

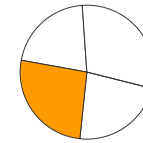




**Scenic Relaxers**  
**26%**

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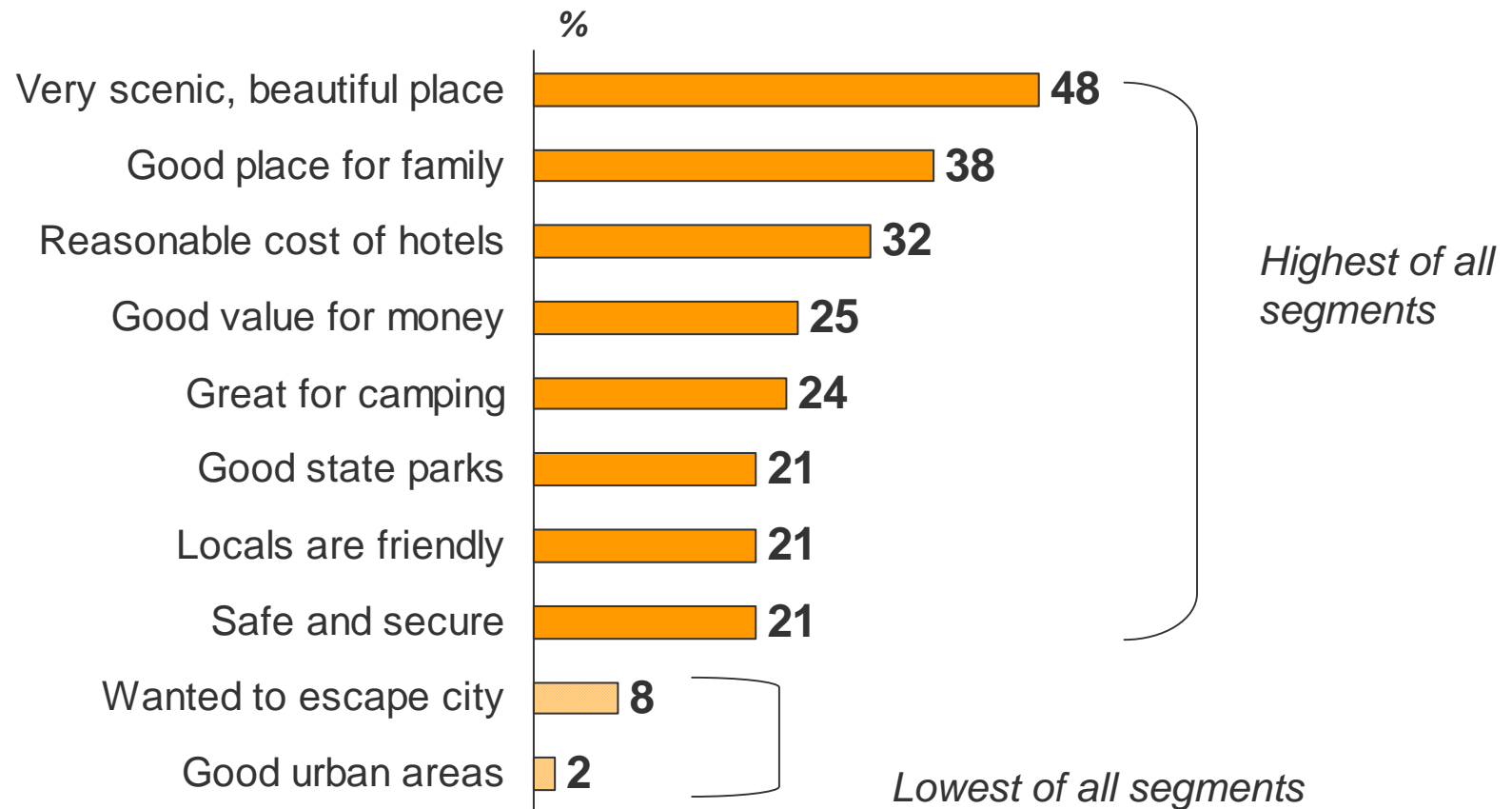
# Travel Attitudes and Habits



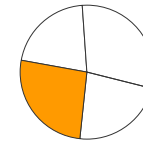
**Scenic Relaxers**  
26%

# Motivations for Most Recent Leisure Trip

- Spending time with family in a scenic place is what motivates Scenic Relaxers.

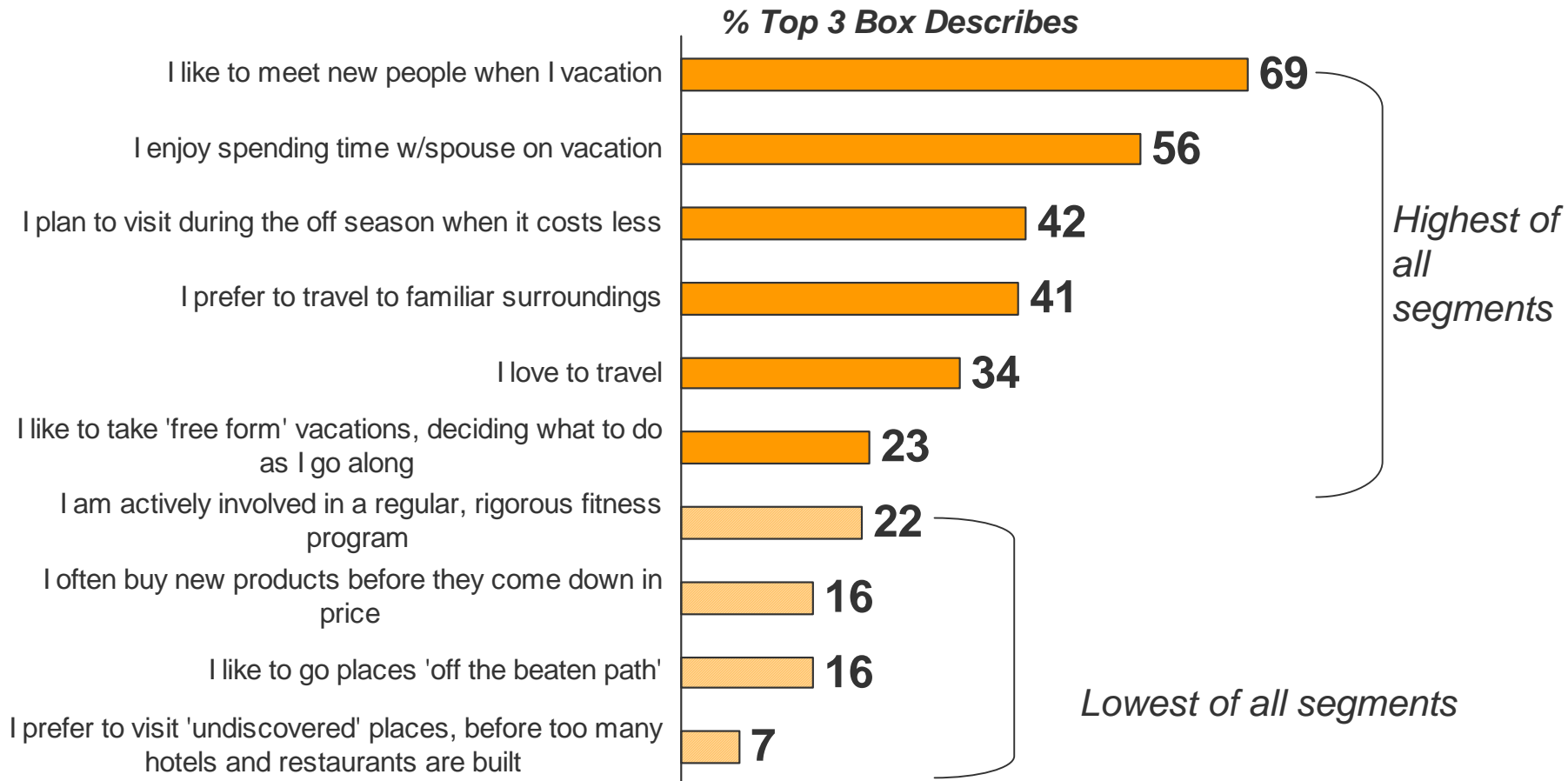


Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?

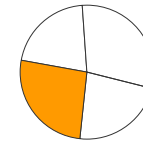


# Attitudes about Travel

- Scenic Relaxers like to travel, albeit in the off-season when it is less expensive for them and their families.
- Scenic Relaxers may be a very viable Fall campaign target.

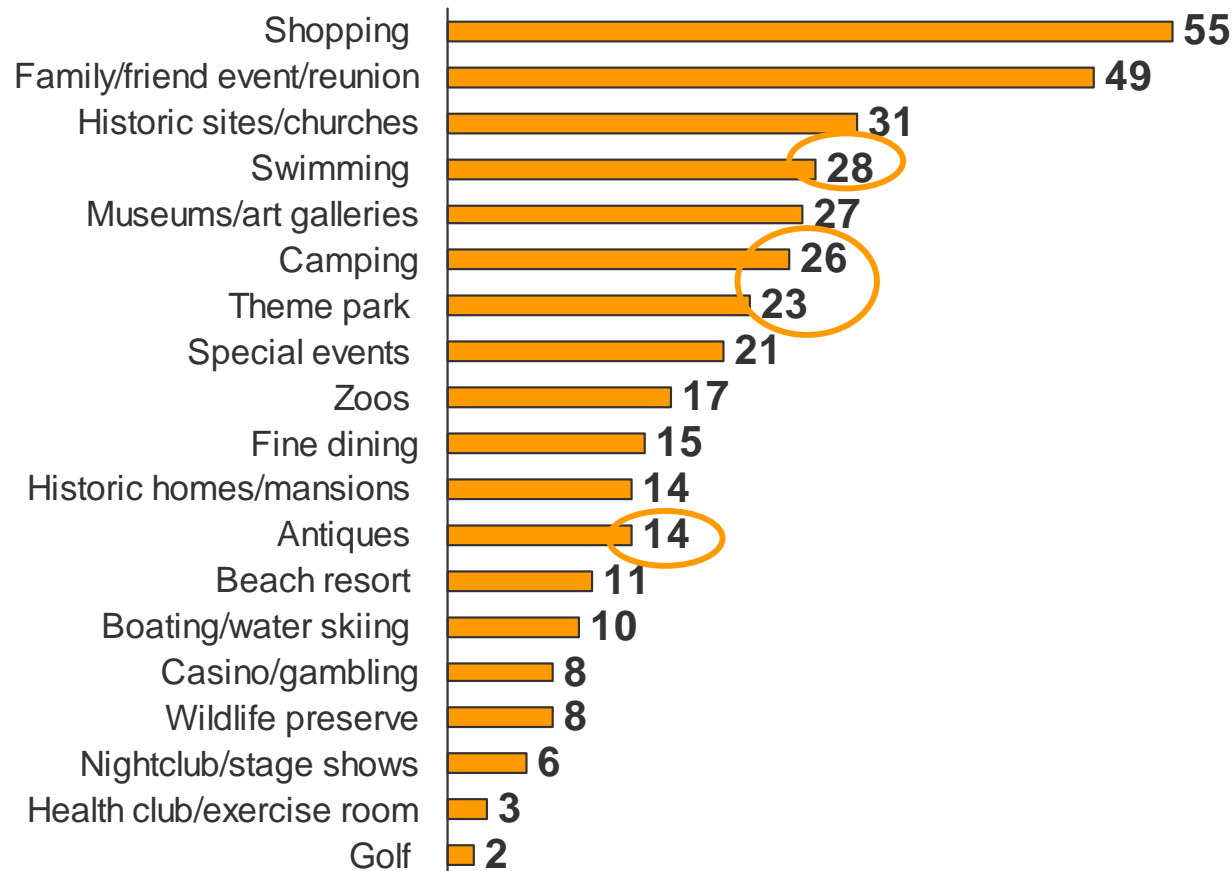


Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.



# Activities on Most Recent Leisure Trip

- Scenic Relaxers like to camp and the outdoors—much more so than other segments.
- They also like to shop and go antiquing.

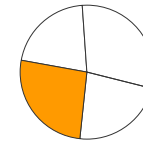


Activities with  $\geq 15\%$  mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

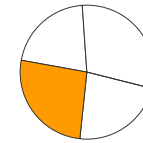
# Summary

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**Scenic Relaxers**  
**26%**

- Given their propensity to be from Oklahoma and Arkansas, Scenic Relaxers represent a key target for the Fall marketing campaign.
- To best motivate Scenic Relaxers, the Fall effort should focus on outdoor activities they love (camping, fall foliage, state parks) and family-oriented activities (such as the Sam Noble Museum and National Cowboy and Western Heritage Museum, Oklahoma Aquarium).



**Scenic Relaxers**  
**26%**

# Key Findings: Fall Scenic Relaxers

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- Creative should concentrate on outdoor relaxing activities and venues that this target finds most appealing.
- The demo should be 35 – 54 years of age and include families.

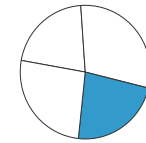
# TERTIARY “STRETCH” TARGET

## Big Trippers

*Detailed Findings*

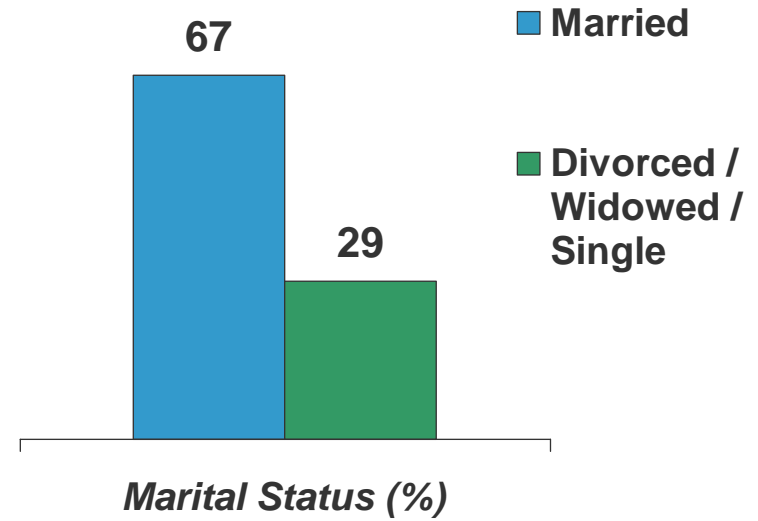


# Demographic Snapshot

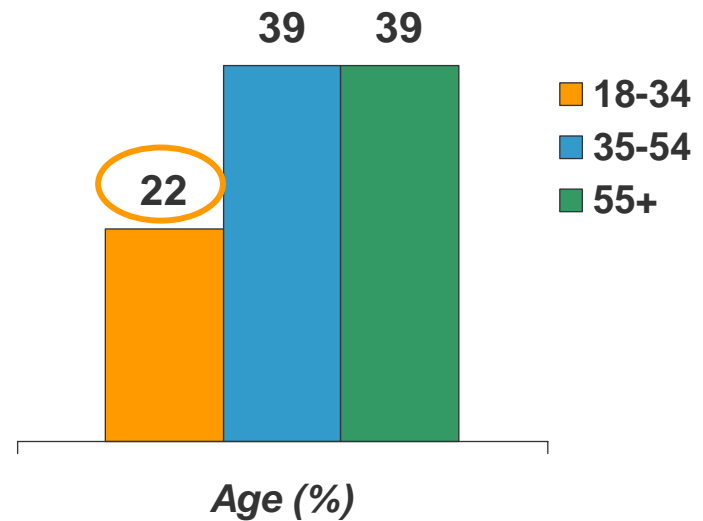
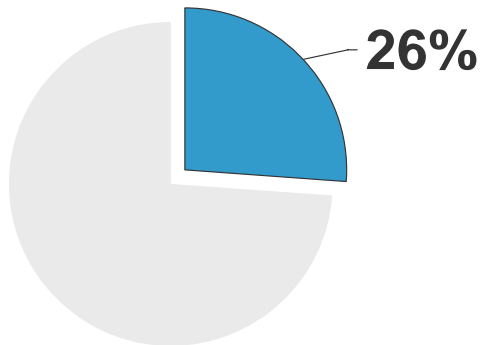


**Big  
Trippers  
23%**

- Young couples and singles
- Average proportion of households with children.

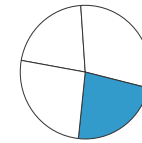


## Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

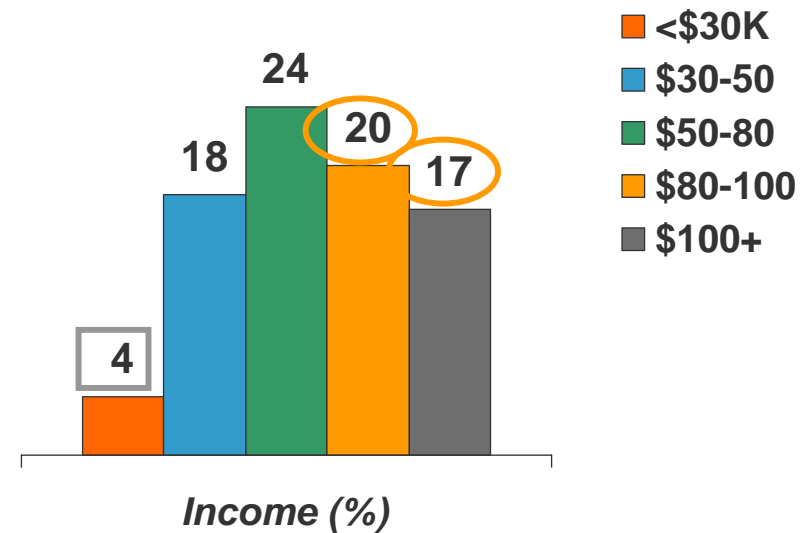
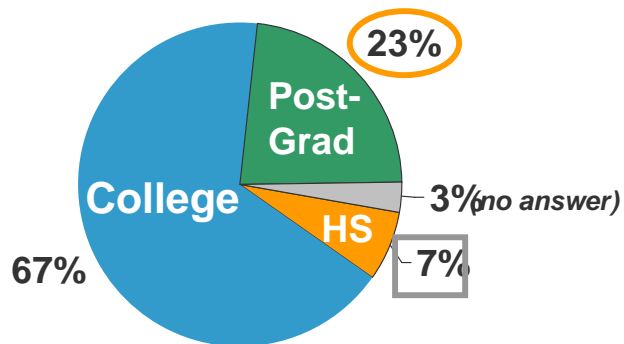
# Socio-Economic Snapshot



**Big  
Trippers  
23%**

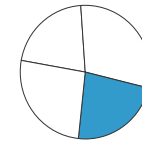
- Nearly a quarter of Big Trippers have a post-graduate education; almost all have college educations.
- Big Trippers are among the wealthiest of all segments.

## Highest Level of Education



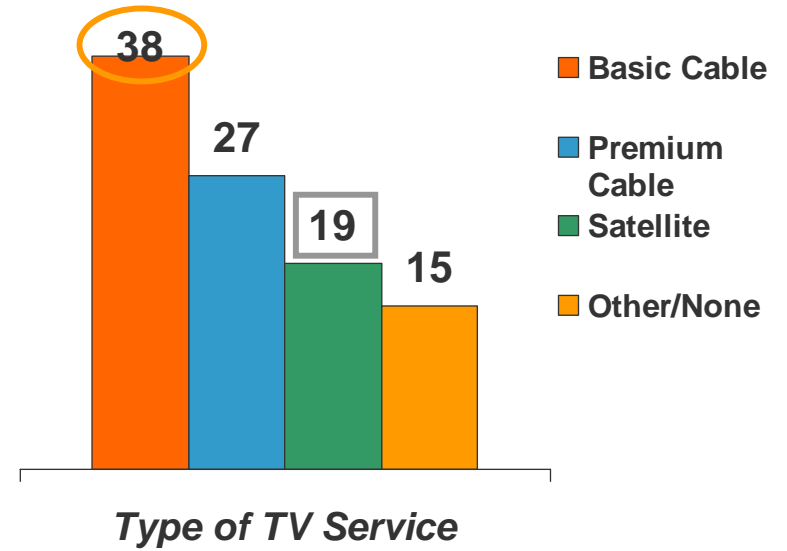
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# Techno-graphic Snapshot

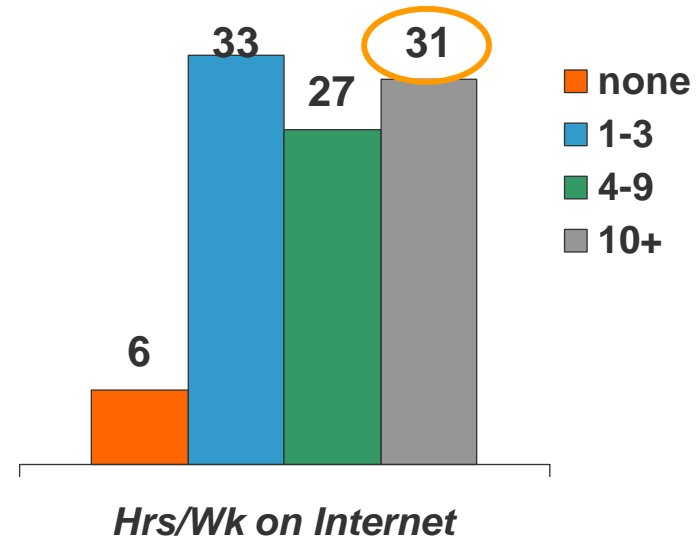
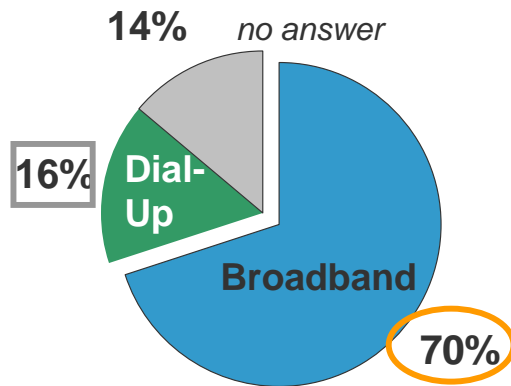


**Big Trippers**  
23%

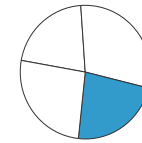
- Big Trippers, like Active Doers, spend a lot of time online, and have broadband access.
- When it comes to cable TV, although they have the financial resources, they don't pay for premium cable.



**Type of Internet Service**

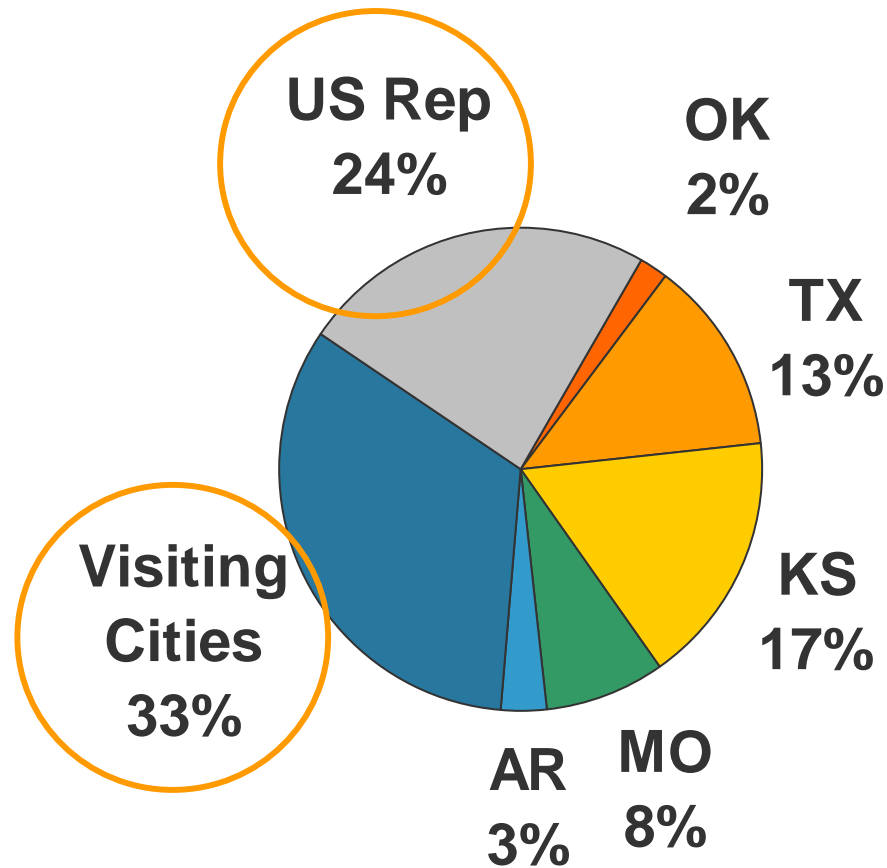


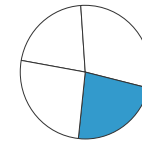
# Geographic Composition



**Big  
Trippers  
23%**

- Well over half of Big Trippers live well outside of the area around OK.



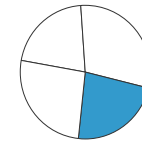


**Big  
Trippers  
23%**

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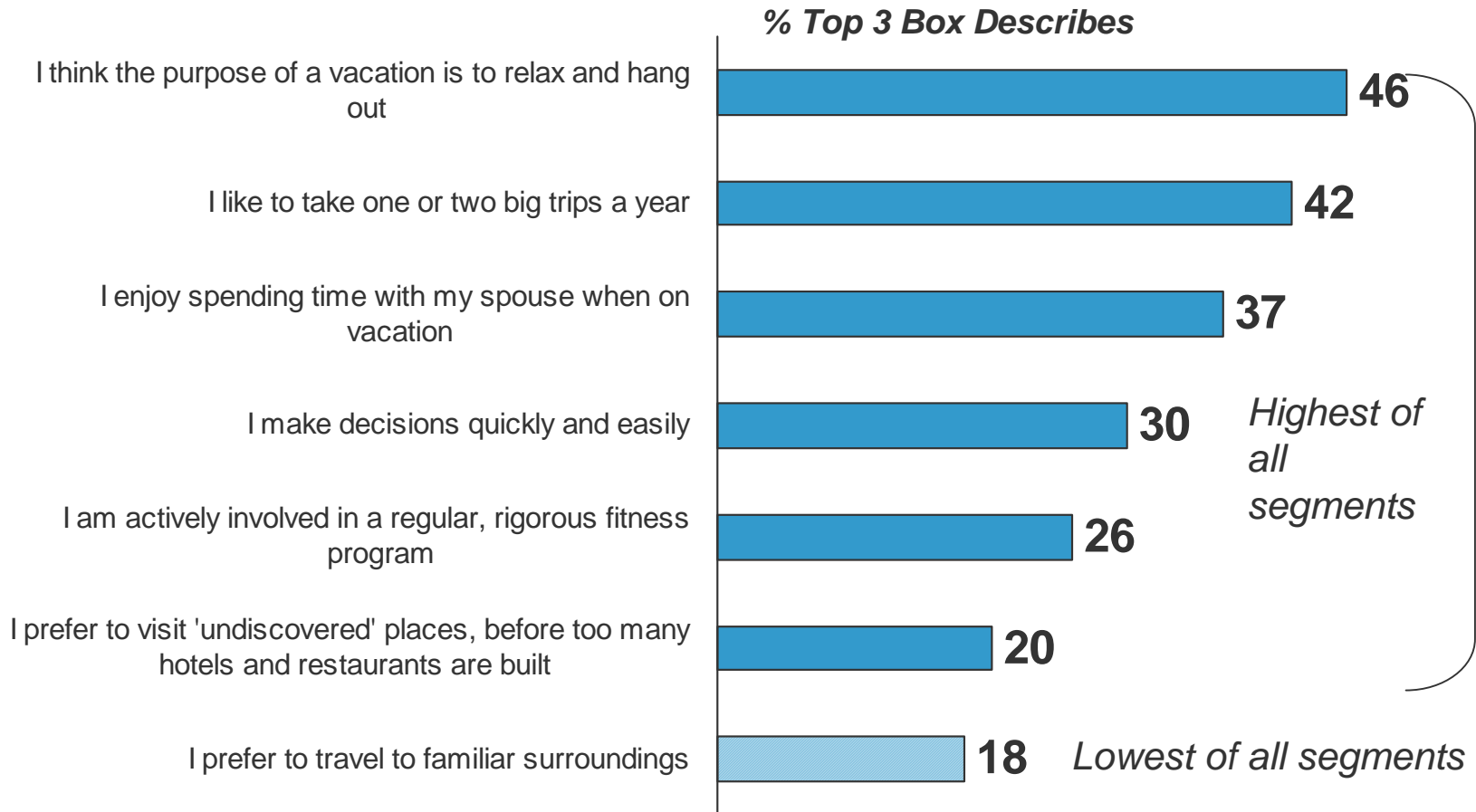
# Travel Attitudes and Habits

# Attitudes about Travel

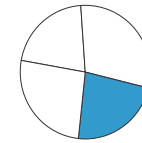


**Big Trippers**  
23%

- Big Trippers are the most likely to plan for BIG vacations, often to undiscovered locations.



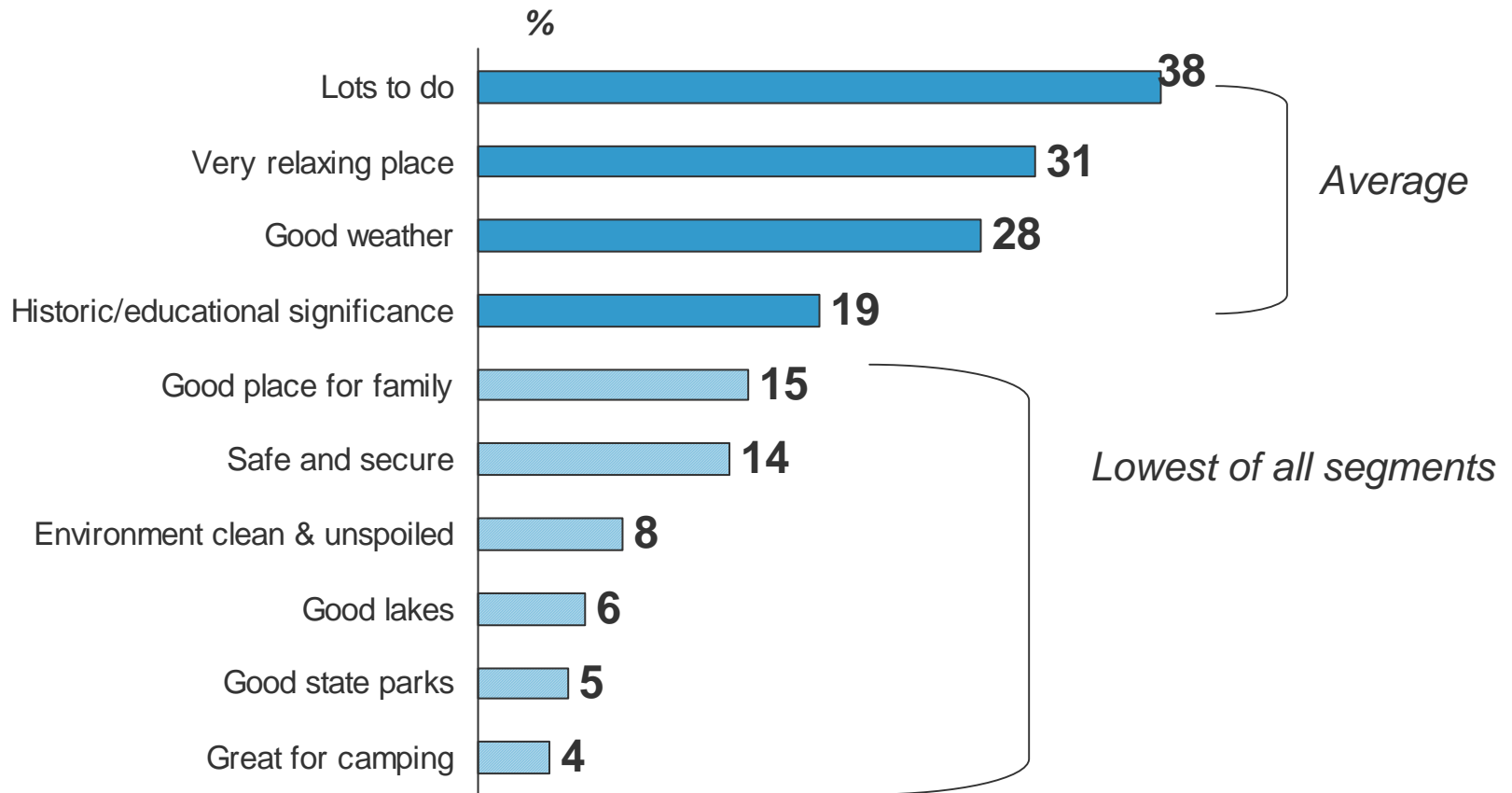
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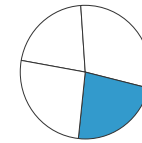
**Big Trippers**  
23%

# Motivations for Most Recent Leisure Trip

- Big Trippers are the most eclectic travelers and have the widest variety of motivations for travel. What *DOESN'T* motivate them is being a good place to take the family and the outdoors.



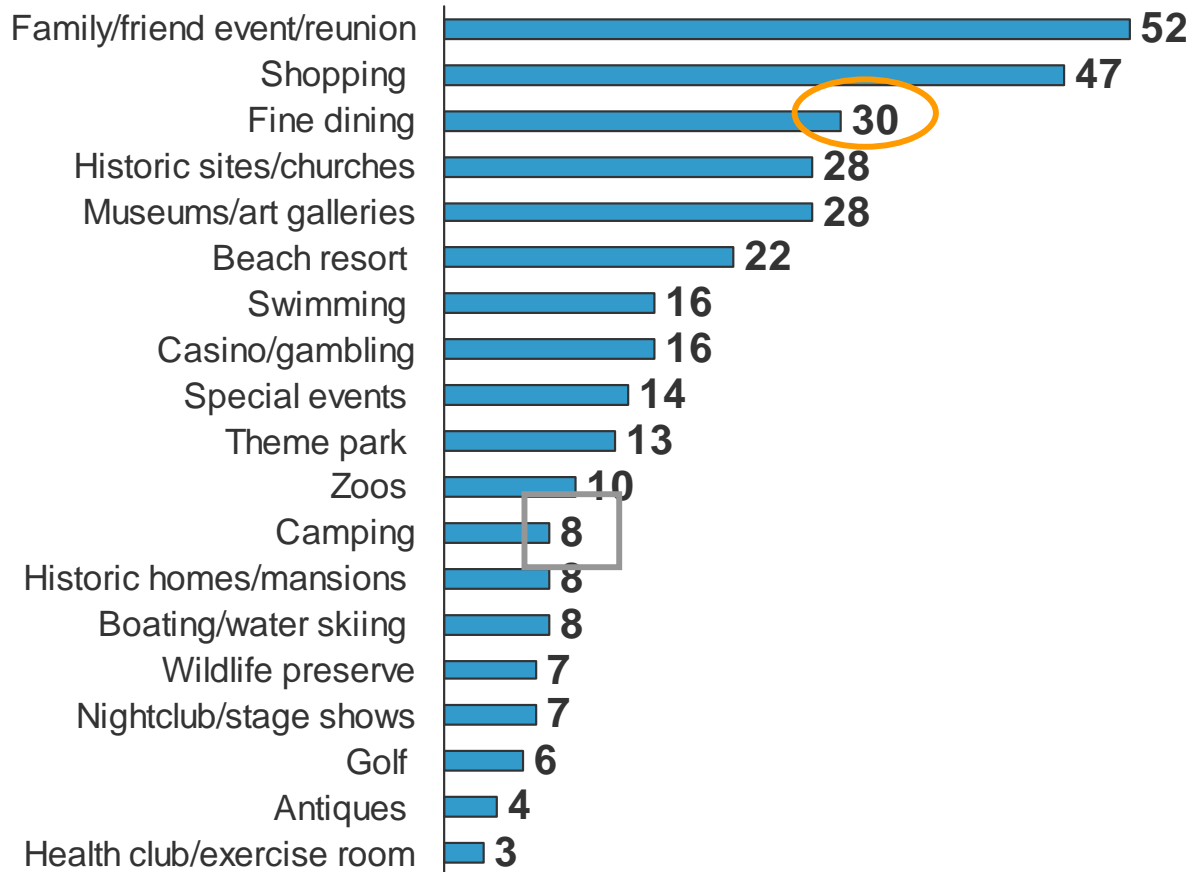
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?



**Big Trippers**  
23%

# Activities on Most Recent Leisure Trip

- This doesn't mean they don't like to visit family and friends. They do.
- They also especially like shopping and fine dining. What don't they like? Camping?

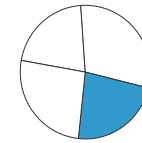


Activities with  $\geq 15\%$  mentions shown

Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.

# Summary

---



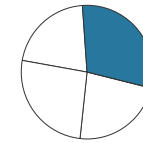
**Big Trippers**  
**23%**

- Although Big Trippers have deep pockets, the fact that they are more likely to live outside the region and are more interested in more exotic vacations makes them a far less viable target opportunity.

# DO NOT TARGET Homebodies

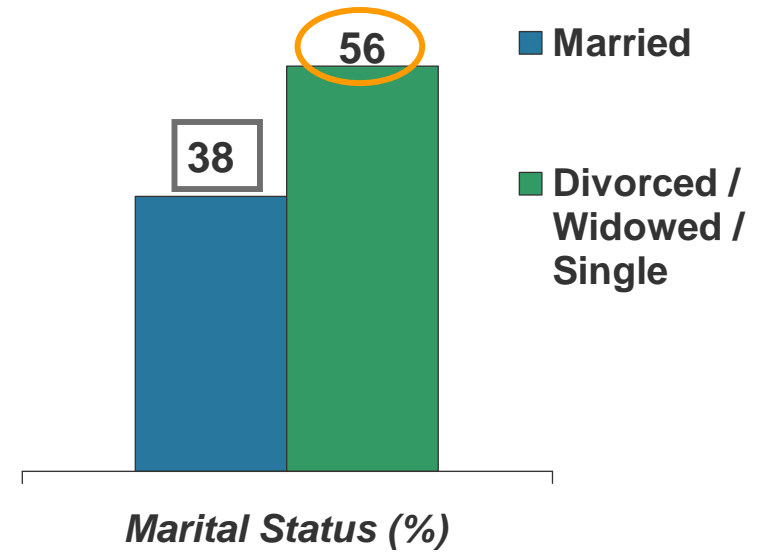
*Detailed Findings*

# Demographic Snapshot

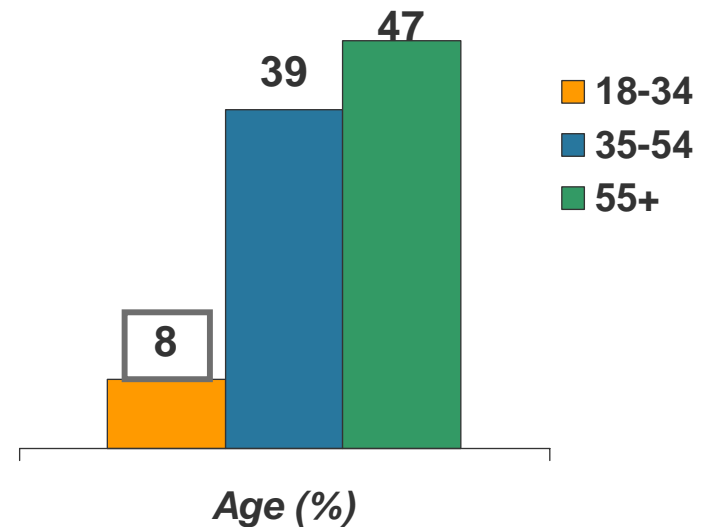
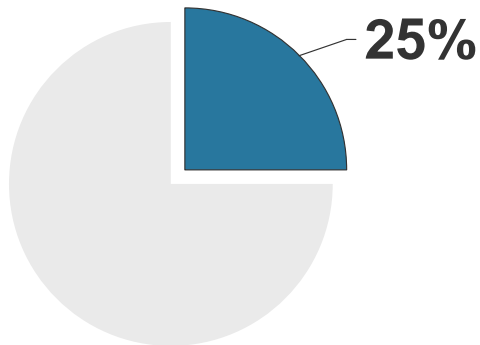


Homebodies  
30%

- Homebodies are more apt to be single-parent and widowed households.
- Homebodies tend to be older.

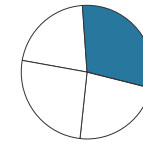


## Households with Children



Q: What is your current marital status? Including yourself, how many people currently live in your household? Please indicate your age.

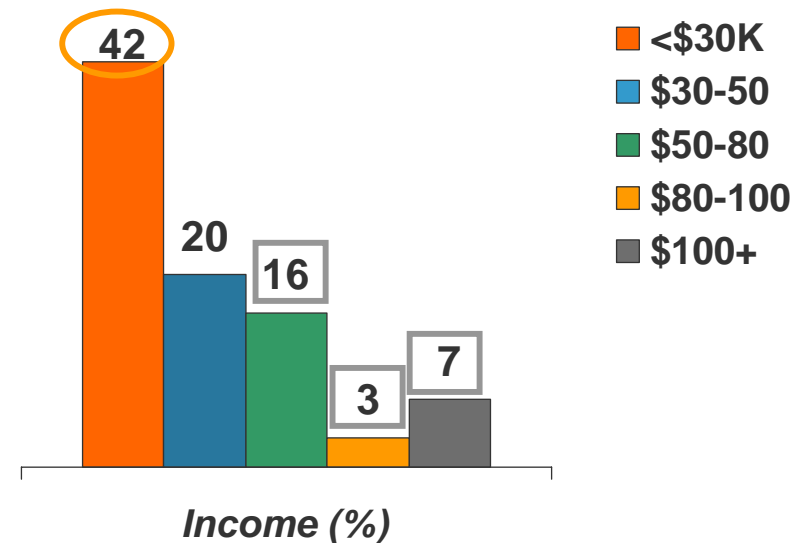
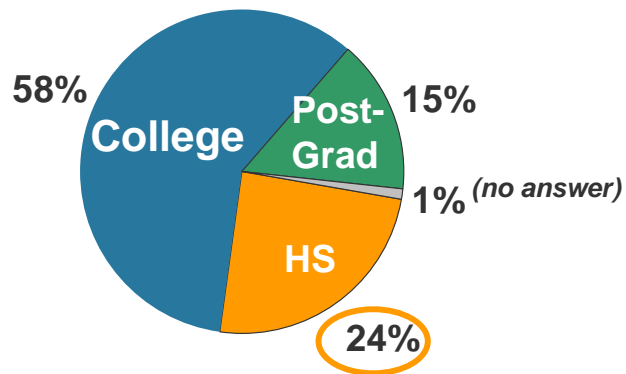
# Socio-Economic Snapshot



Homebodies  
30%

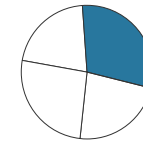
- Homebodies are strikingly the least wealthy of all segments, and, along with Scenic Relaxers, are the most likely to have only a high school education.

*Highest Level of Education*



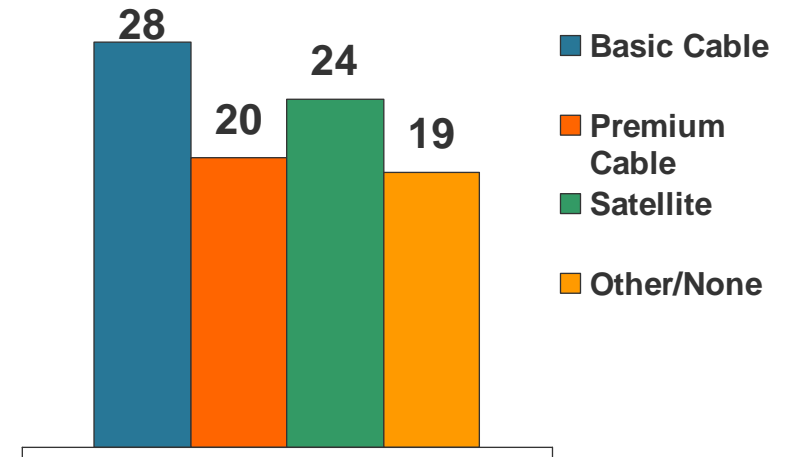
Q: Which of the following best describes the last level of school that you completed / your total household income?

# Techno-graphic Snapshot



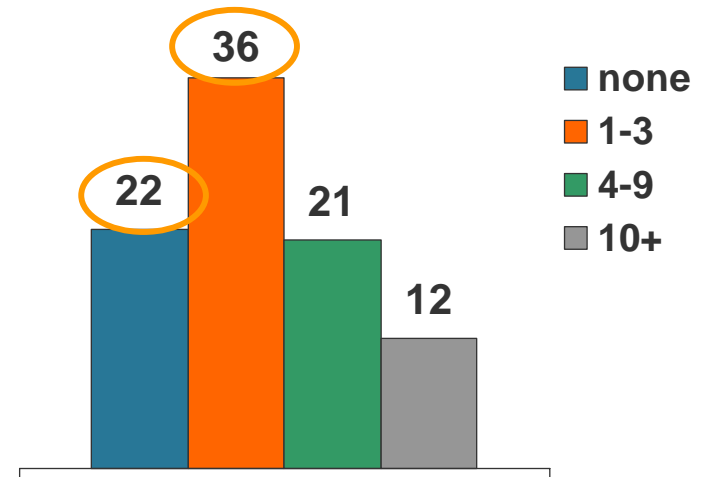
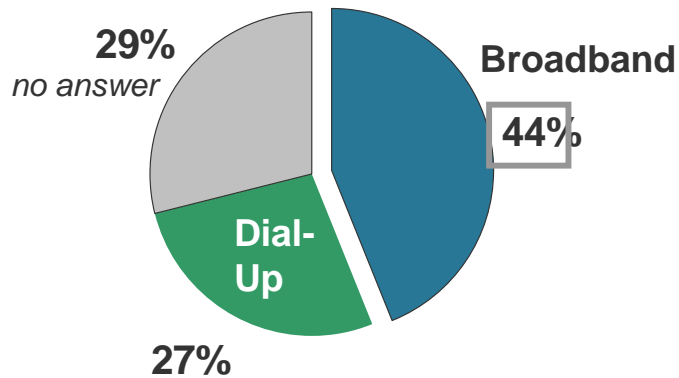
Homebodies  
30%

- Homebodies spend little time, if any, on the Internet.



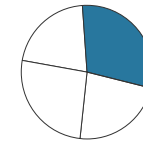
Type of TV Service

Type of Internet Service



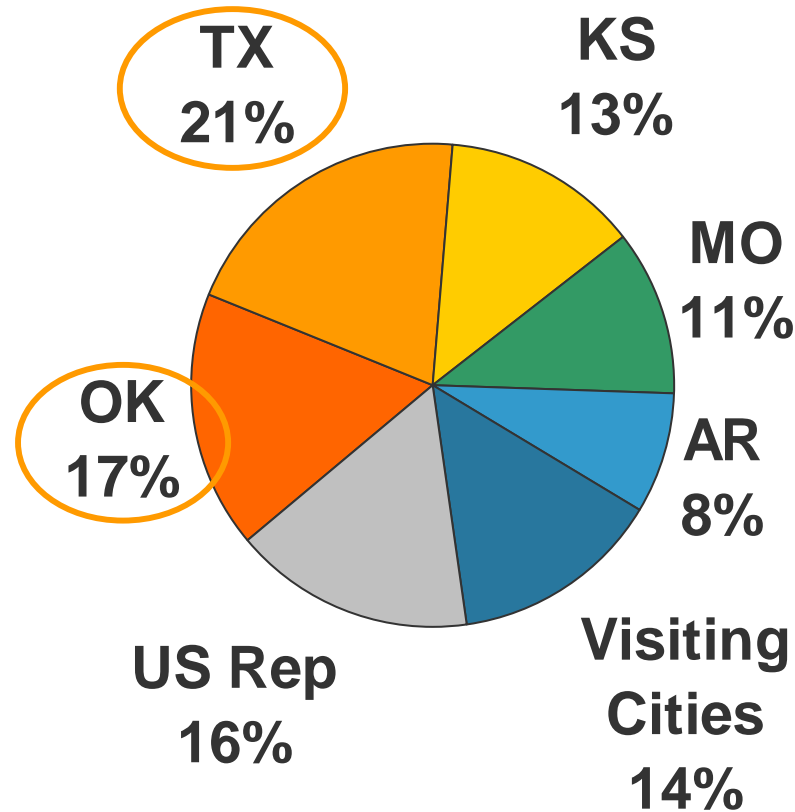
Hrs/Wk on Internet

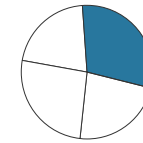
# Geographic Composition



Homebodies  
30%

- Homebodies are likely to live in OK and TX as well as surrounding states.



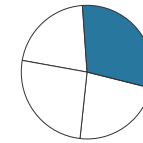


**Homebodies**  
**30%**

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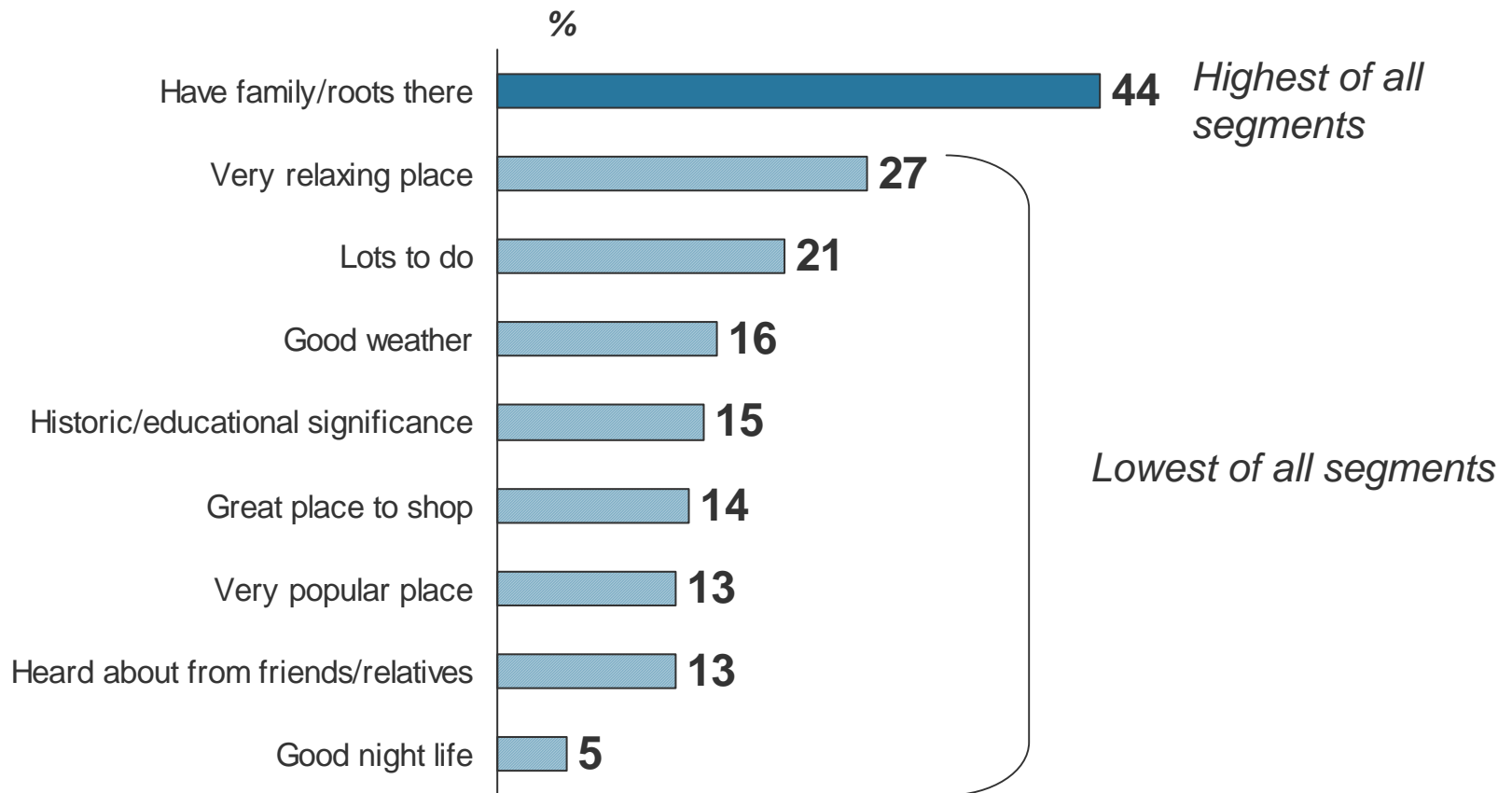
# Travel Attitudes and Habits

# Motivations for Most Recent Leisure Trip



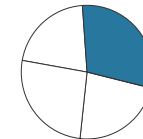
Homebodies  
30%

- The biggest...and virtually only...motivator for Homebodies to travel is because of family.



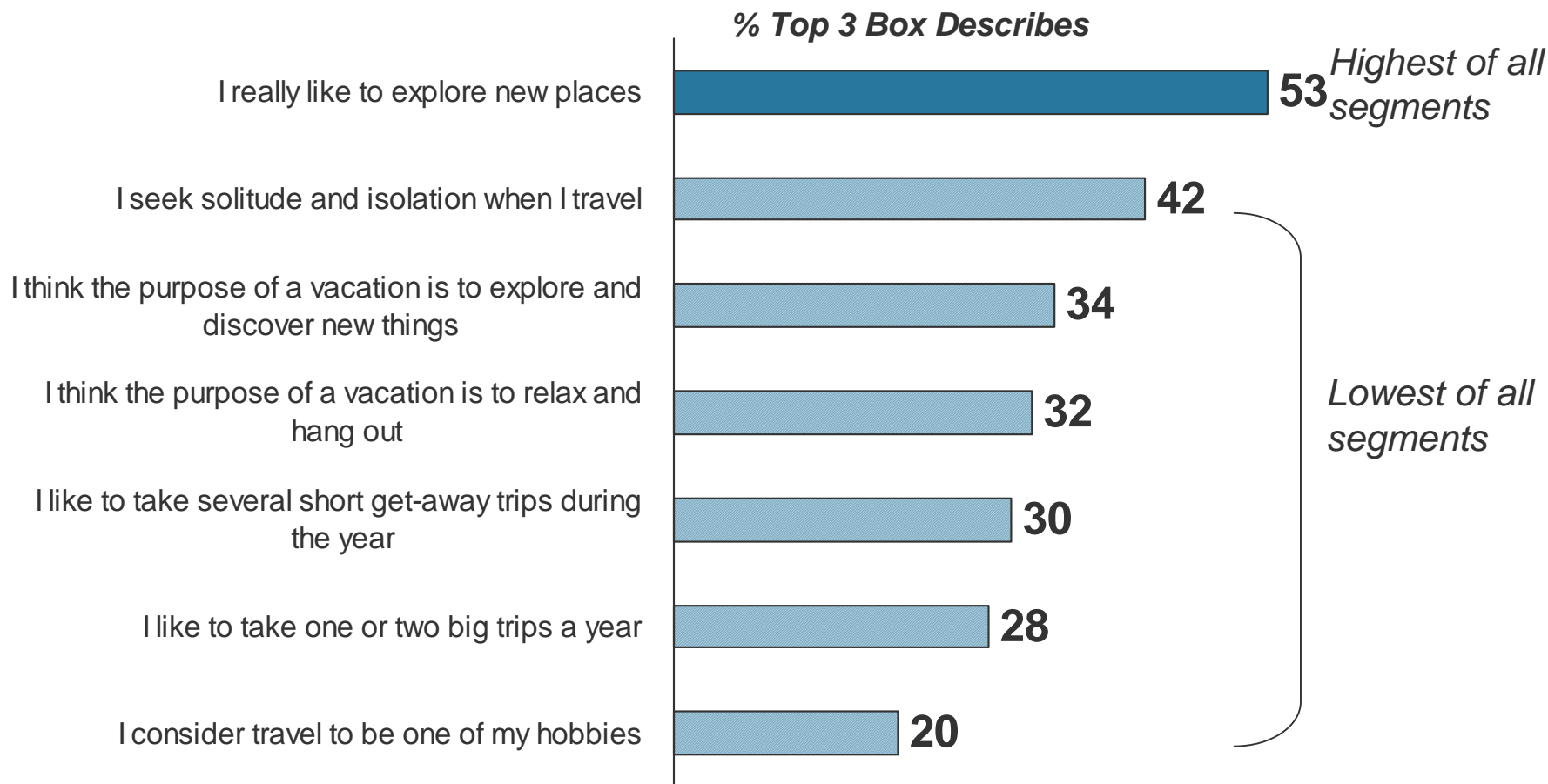
Q: Thinking of your last leisure trip / vacation, what contributed to your desire to go there?

# Attitudes about Travel

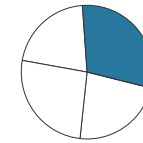


Homebodies  
30%

- Although Homebodies don't travel much except to visit family, they aspire to explore new places.



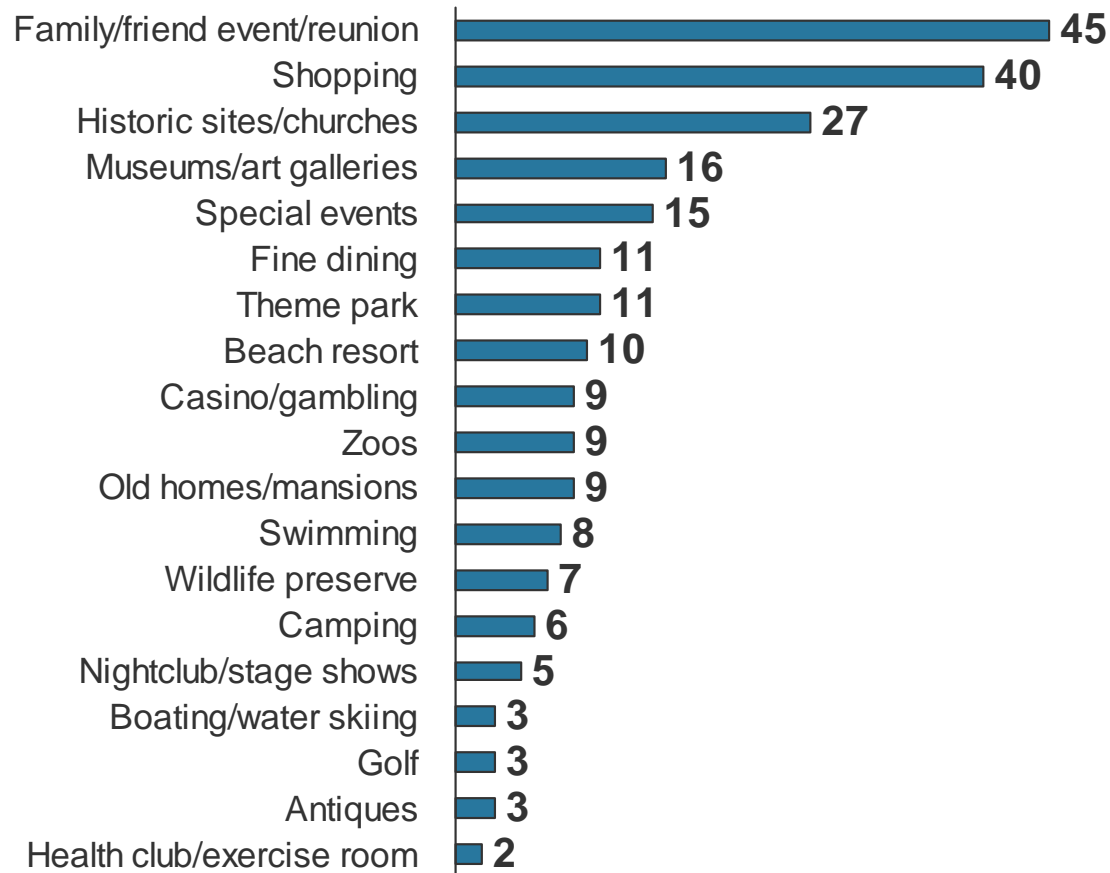
Q: Below are several statements about travel and personal preferences. Using the scale indicated, please tell us how much each attribute describes you.



**Homebodies**  
30%

# Activities on Most Recent Leisure Trip

- Homebodies—because they really don't travel much—are the least involved in vacation activities.



*Activities with  $\geq 15\%$  mentions shown*

*Q: Please check all of the activities you did/visited on your leisure vacation trip in the past 12 months.*

# Appendix



# Who are These Consumers?

## Lifestage Profile

- Active Doers tend to be older, perhaps retired, which explains their extra time and money for travel.

- Big Trippers are younger singles and couples with a slight male skew.

- Scenic Relaxers are families, with the highest concentration of children of all segments

|   | Homebodies | Big Trippers | Scenic Relaxers | Active Doers |
|---|------------|--------------|-----------------|--------------|
| <b>Age (%)</b>                            |            |              |                 |              |
| 18-34                                     | 8          | 22           | 21              | 9            |
| 35-54                                     | 39         | 39           | 48              | 39           |
| 55+                                       | 47         | 39           | 28              | 52           |
| <i>no answer</i>                          | 6          | 0            | 3               | 0            |
| <b>Gender (%)</b>                         |            |              |                 |              |
| Male                                      | 19         | 22           | 10              | 17           |
| Female                                    | 75         | 77           | 88              | 83           |
| <i>no answer</i>                          | 6          | 1            | 2               | 0            |
| <b>Marital Status (%)</b>                 |            |              |                 |              |
| Married                                   | 38         | 67           | 75              | 70           |
| Divorced                                  | 20         | 6            | 11              | 8            |
| Widowed                                   | 19         | 7            | 5               | 9            |
| Single                                    | 17         | 16           | 6               | 9            |
| <i>no answer</i>                          | 6          | 4            | 3               | 4            |
| <b>Children &lt; 17 in Household? (%)</b> |            |              |                 |              |
| Yes                                       | 25         | 26           | 45              | 27           |

# Who are These Consumers?

## Socio-Economic Profile

- Big Trippers and Active Doers are better educated and have higher incomes than other groups.

- Homebodies have by far the lowest household incomes.

### **Income (%)**

under \$30,000  
 30,000 to \$49,999  
 50,000 to \$79,999  
 80,000 to \$99,999  
 \$100,000 +  
 no answer

### **Education (%)**

High school or less  
 Some college  
 College graduate  
 Post graduate  
 no answer

|                      | Homebodies | Big Trippers | Scenic Relaxers | Active Doers |
|----------------------|------------|--------------|-----------------|--------------|
| <b>Income (%)</b>    |            |              |                 |              |
| under \$30,000       | 42         | 4            | 26              | 5            |
| 30,000 to \$49,999   | 20         | 18           | 27              | 10           |
| 50,000 to \$79,999   | 16         | 24           | 22              | 29           |
| 80,000 to \$99,999   | 3          | 20           | 9               | 18           |
| \$100,000 +          | 7          | 17           | 12              | 26           |
| no answer            | 12         | 13           | 13              | 17           |
| <b>Education (%)</b> |            |              |                 |              |
| High school or less  | 24         | 7            | 31              | 11           |
| Some college         | 38         | 26           | 32              | 42           |
| College graduate     | 20         | 42           | 26              | 21           |
| Post graduate        | 15         | 24           | 9               | 25           |
| no answer            | 12         | 13           | 13              | 1            |

# Media Habits

- The heavy travelers are also the consumers who spend the most time on the Internet.

- Scenic Relaxers are by far the most likely to have satellite, perhaps because of availability issues in rural areas where they live.

- Talk radio is big among the heavy travelers.

- Scenic Relaxers listen to popular music: Rock, Top 40 and Country.

## Hours per Week on Internet

None

1-3

4-9

10+

No answer

## Type of TV Service

Cable TV-Basic service

Cable TV-Premium service

Satellite TV

Other

Don't subscribe / use antennae

No answer

## Music Formats Listened to

News

National Public Radio

Adult contemporary

Jazz

Classical

Rock

Sports

Talk

Top 40

Country

Satellite Radio (Such as Sirius, XM)

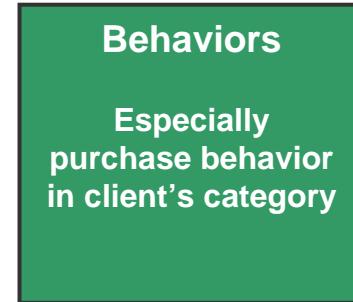
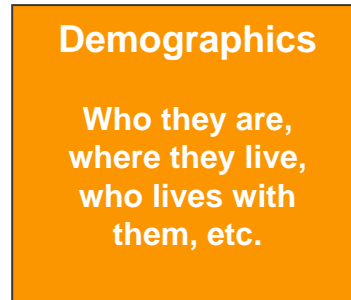
Big Band

|                                      | Homebodies | Big Trippers | Scenic Relaxers | Active Doers |
|--------------------------------------|------------|--------------|-----------------|--------------|
| (%)                                  |            |              |                 |              |
| None                                 | 22         | 6            | 26              | 12           |
| 1-3                                  | 36         | 33           | 19              | 16           |
| 4-9                                  | 21         | 27           | 25              | 33           |
| 10+                                  | 12         | 31           | 26              | 36           |
| No answer                            | 8          | 2            | 5               | 4            |
| Cable TV-Basic service               | 28         | 38           | 29              | 27           |
| Cable TV-Premium service             | 20         | 27           | 16              | 34           |
| Satellite TV                         | 24         | 19           | 35              | 21           |
| Other                                | 1          | 1            | 1               | 1            |
| Don't subscribe / use antennae       | 18         | 14           | 17              | 14           |
| No answer                            | 9          | 2            | 1               | 4            |
| News                                 | 25         | 31           | 19              | 28           |
| National Public Radio                | 14         | 17           | 10              | 14           |
| Adult contemporary                   | 12         | 22           | 11              | 26           |
| Jazz                                 | 11         | 11           | 6               | 14           |
| Classical                            | 19         | 20           | 16              | 12           |
| Rock                                 | 30         | 30           | 35              | 28           |
| Sports                               | 5          | 8            | 9               | 10           |
| Talk                                 | 11         | 21           | 11              | 21           |
| Top 40                               | 18         | 19           | 24              | 16           |
| Country                              | 34         | 31           | 44              | 38           |
| Satellite Radio (Such as Sirius, XM) | 3          | 6            | 5               | 7            |
| Big Band                             | 1          | -            | 1               | -            |

# Concept of Using Multiple Domains to Define Segments

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- Domains refer to the different categories of information we can use to describe consumers. Three common domains are:



- The most important domain is the Behavioral domain—b/c no matter how dynamic the segments may be based on what they believe, how much they make or where they live, if they don't differ with regard to what they *purchase*, they are of limited use.
- By the same token, if segments are behaviorally distinct, but are too similar attitudinally or demographically, they leave us wanting of more insight on methods and messages to effectively communicate with each group of consumers
- Ideally, segments should be distinct on all domains of interest to the category

# Brief Review of Methodology

- Traditionally, segmentations have grouped consumers using only attitudes or only behaviors. Often, segments produced by these methods have been very distinctive on one domain (e.g., attitudes) but have lacked robustness on others (e.g., behaviors), resulting in limitations on the segmentation's usefulness for marketing efforts.
- In contrast to traditional methods, the Multi-Domain approach introduces an additional step prior to clustering process. This preliminary step (called "canonical correlation") examines the relationship between two sets of items and produces **new** variables for clustering that represent this correlation, guaranteeing maximal differentiation on **all** domains included in the research. Below is just one example of how a multi-domain approach may be structured.

