

The Austin CVB sources research from multiple organizations and companies.

For annual **Economic Impact** (travel spending, taxes, etc...) we source the Economic Development and Tourism Division of the Office of the Governor. The report is generated on their behalf by Dean Runyan Associates.

https://travel.texas.gov/tti/media/PDFs/TXImp15pRev2_1.pdf

Austin-Round Rock, TX MSA pg. 41.

Dean Runyan Associates:

www.deanrunyan.com

Dean Runyan Associates has worked for 25 years to assist with market research, planning and economic analysis for travel, tourism, recreation, and education projects. Our emphasis is on facilities and destination locations that seek economic or market information for planning, marketing, policy, evaluation and/or design. Projects range from the individual facility or event level to states and the nation.

We feel that our work is an important sector of our economy and society. Our nation faces serious challenges balancing the needs of our natural areas with the imperatives of economic growth and job creation. Moreover, changing economic conditions and the dynamics of energy costs are particularly important to the travel and recreation industry. This turmoil notwithstanding, the recreation and tourism industry remains one of the most significant industries worldwide, and a leading growth sector in North America. Their focus is on helping travel industry businesses, attractions and destination communities that face these opportunities and challenges.

Clients include- Arizona Office of Tourism, California Travel and Tourism Commission, Colorado Tourism Commission, Texas Tourism, Seattle, Sonoma, Spokane, US National Park Service.

For jobs data we source the US Bureau of Labor Statistics.

<https://www.bls.gov/>

Domestic visitation data (including profile, volume, etc..) is again sourced from the Economic Development and Tourism Division of the Office of the Governor. The research is generated on their behalf by D.K. Shifflet & Associates, Ltd.

https://travel.texas.gov/tti/media/PDFs/2015-Hill-Country-Region_2.pdf -

Austin- Round Rock TX MSA data begins on pg. 15 and Methodology pg. 29

DK Shifflet:

www.dkshifflet.com

DK Shifflet boasts the industry's most complete database on U.S. resident travel both in the U.S. and worldwide. We collect data monthly from a U.S. representative sample

adding over 60,000 traveling households annually. We're dedicated to providing the highest-quality travel and traveler research. And have been since 1982.

Clients include- Visit California, Delaware, Visit Florida, Georgia, Hawai'i Tourism Authority, Texas Tourism, Atlanta, Choose Chicago, Cleveland, Durham, NC, Los Angeles, Best Western, San Antonio, New Orleans.

International visitation is sourced from several organizations and companies. Oxford Economics *Global City Travel Report*, the Economic Development and Tourism Division of the Office of the Governor, SMARI, and U.S. Department of Commerce, Stats Canada.

[https://travel.texas.gov/tti/media/PDFs/Texas-2015-Overseas-Visitors-to-Texas-Report-\(11-2-2016\)_1.pdf](https://travel.texas.gov/tti/media/PDFs/Texas-2015-Overseas-Visitors-to-Texas-Report-(11-2-2016)_1.pdf)

Data for both reports is compiled partially from the U.S. Department of Commerce Office of Travel and Tourism reports

http://tinet.ita.doc.gov/outreachpages/inbound.general_information.inbound_overview.html

Travel Market Insights:

travelmi.com

Travel Market Insights services, partners with, and represents U.S. destinations and business, specifically providing market intelligence on travel to, within, and throughout the United States. That's our niche—International Travel to the USA.

Clients include- Boston CVB, Capital Region USA, Texas Tourism, Visit Orlando, Destination DC, Tiffany and Company, Maine Office of Tourism, South Carolina Department of Parks, Recreation and Tourism, Philadelphia CVB, Las Vegas CVB

SMARI:

www.smari.com

Since 1983, SMARI has been helping clients get the research they need and apply that research to make the best business decisions. A full-service market research company that has expanded from its local roots, gaining national and international projects.

Clients include- Carrier, United Way, Jackson Hewitt, Indianapolis Museum of Art, Goodwill Industries.

Oxford Economics: *(Reports are generated based on a query in the database and forecasts international travel to Austin through 2025)*

www.oxfordeconomics.com

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK

companies and financial institutions expanding abroad. Since then, they have become one of the world's foremost independent global advisory firms, providing reports, forecasts, and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Their best-of-class global economic and industry models and analytical tools give an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has more than 20 offices across the globe. They employ over 300 full-time staff, including 200 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Their global team is highly skilled in a full range of research techniques and thought leadership capabilities, from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics. Underpinning in-house expertise is a contributor network of over 500 economists, analysts, and journalists around the world.

Clients include- IBM, Accenture, Google, Deloitte, World Travel & Tourism Council, US Travel Association, Visit Britain, Emirates, and Dubai Airports.

Hotel Bookings Reports and Special Events Economic Impact

Smith Travel Research (STR) is the world's leading resource for hotel performance data. STR tracks supply and demand metrics for the global hotel industry. STR provides data for all major hotel chains and destinations of all sizes worldwide. Due to the republication restrictions outlined in the ACVB subscription contract with STR, ACVB is prohibited from sharing these reports; data inquiries are directed to STR.

Strategic Data Resources (SDR) provides DMOs empirical data to inform strategic sales and marketing decisions. SDR's signature product is the TAP Report, which shows forward-looking market data, which is collected from monthly downloads from 70 DMOs that includes room night patterns on past and future demand. The information included in the TAP Report package allows DMOs and convention center to strategically position future convention bids. The TAP Report is also available in competitive sets of the client's choosing. TAP Report data is available upon request.

ACVB also uses internal booking data from our CRM to generate sales reports and analyze booking trends.

Destination Marketing Association International (DMAI)/Tourism Economics City-specific Localized Economic Impact Calculator; see methodology below. (Individual event reports are proprietary to the group since it includes their internal spending data.)

- **Oxford Economics'** 2010 survey of meeting planners responsible for 290 exhibitions representing 1 million attendees and 350,000 exhibitors

- **Longwood's International** ongoing survey of U.S. household travel behavior in 100 cities with an exclusive focus on meeting, convention, and trade show spending
- Convention Industry Council's study on the Economic Significance of the Meetings Industry providing national statistics
- City-specific data on costs by sector, including the restaurant, retail, recreation, transportation, and lodging industries from the **U.S. Bureau of Labor Statistics**
- City-specific sales, wage, and employment impact models
- City-specific tax rate
- DMAI's empowerMINT historical database provides metrics on the number of delegates and room nights
- Convention center data provided by SMG
- Compilation of event characteristics from over 150 local sporting event studies
- CRM data from 80 DMOs
- Visitor surveys (with a significant sample of 3500 overnight and 1200 day attendees)

Advertising and Marketing Data Sources:

Google Analytics

Sprout Social

ADARA – Magellan Impact Tool

Sizmek – Advertising tracking

Sojern Attribution Data

Trip Advisor - Arrivalist Data

Expedia booking data

aRes and Once There - booking engines

BRAND USA

Austin-Round Rock, TX MSA Executive Summary

Highlights of Visitors to the Austin-Round Rock MSA

- Texans generated 65.9% of Person-Days to the Austin-Round Rock MSA; Non-Texans 34.1%
- Top 3 Texan origin DMAs (Houston, Dallas-Fort Worth, San Antonio); Non-Texan DMAs (New York, San Francisco-Oakland-San Jose, Los Angeles)
- Leisure travel represented 69.8% of Person-Days to the Austin-Round Rock MSA; Vacation 21.8% and Non-Vacation 48%
- Business travel represented 30.2% of Person-Days to the Austin-Round Rock MSA; Meetings 15.6% and Transient 14.6%
- Activity categories participated: Attractions 18.7%, Culture 28.1%, Family/Life Events 33.6%, Libation/Culinary 26.5%, Nature 14.1%, Outdoor Sports 9.6%, General 39.5%
- Average Party Size (Adults and Children) 1.72 persons
- Average Length of Stay was 1.95 days (overnight and days); 2.45 nights (overnight only).
- 79.4% traveled by Auto; 19% by Air
- Average distance traveled 470 miles
- Accommodation Type: Paid 61.7%; Non-Paid 38.1%; Other Overnight 0.2%
- Average Per Person Per Day Spending \$132.00
- Average Age 44.8 years
- Average Household Income \$98,082
- Employment: Employed 70.4%, Retired 13.2%, Not Employed 16.5%
- Marital Status: Married 60.0%, Never Married 31.1%, Divorced/Widowed 8.9%
- Children in Household: Yes 34.9%, No 65.1%

Austin-Round Rock, TX MSA Executive Summary

Volume/Share

The number of Person-Stays to the Austin-Round Rock MSA was estimated at 24.11 million in 2015, and the volume of Person-Days was estimated at 48.18 million.

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

Austin-Round Rock, TX MSA Volume (millions)

Person-Days	Total	Leisure	Business
2015	48.18	32.58	15.59
2014	45.55	30.54	15.01
2013	43.69	29.17	14.53
Person-Stays	Total	Leisure	Business
2015	24.11	15.58	8.53
2014	22.62	14.70	7.92
2013	21.54	14.09	7.45

Austin-Round Rock, TX MSA Share of Texas Travel

Person-Days	Total	Leisure	Business
2015	9.3%	8.7%	11.3%
2014	8.9%	8.2%	10.8%
2013	8.7%	8.0%	10.5%

Austin-Round Rock MSA

MSA		MSA	
Top Origin DMAs (Person-Days)		Top Origin DMAs (Person-Days)	
In State DMAs		Out-of-State DMAs	
Total Texans (Intrastate)	65.9%	Total Non-Texans (Interstate)	34.1%
Houston	15.4%	New York, NY	2.9%
Dallas-Fort Worth	12.9%	San Francisco-Oakland-San Jose, CA	2.4%
San Antonio	10.2%	Los Angeles, CA	2.0%
Austin	9.6%	Portland, OR	1.4%
Waco-Temple-Bryan	4.2%	Atlanta, GA	1.2%
Harlingen-Weslaco-Brownsville-McAllen	3.5%	New Orleans, LA	1.1%
Tyler-Longview (Lufkin, Nacogdoches)	1.8%	Chicago, IL	1.0%
El Paso	1.3%	Salt Lake City, UT	0.9%

Austin-Round Rock MSA

MSA		MSA	
Purpose of Stay (Person-Days)		Purpose of Stay (Person-Days)	
Total Leisure	69.8%	Total Business	30.2%
Vacation	21.8%	Meetings	15.6%
Getaway Weekend-Overnight	13.2%	Convention	6.4%
General Vacation-Overnight	6.5%	Seminar/Training	6.0%
Day Trip Vacation/Getaway	2.2%	Other Group Meetings	3.2%
Non-Vacation	48.0%	Transient	14.6%
Visit Friend/Relative	28.1%	Sales/Purchasing	3.2%
Special Event (celebration, reunion)	8.3%	Consulting/Client Service	2.9%
Medical/Health Care	2.0%	Construction/Repair	1.0%
Convention/Show/Conference	1.8%	Government/Military	0.4%
Seminar/Class/Training (personal)	1.2%	Inspection/Audit	0.3%
Other Leisure/Personal	6.5%	Other Business	6.8%

Austin-Round Rock MSA

MSA		MSA	
Activities Summary (Stays)			
Attractions (Net)	18.7%	Nature (Net)	14.1%
Nightlife (bar, nightclub etc.)	12.3%	Parks (national/state, etc.)	10.7%
Amateur Sports (attend/participate)	4.2%	Beach/Waterfront	2.3%
Show: Boat, Car, Home	2.1%	Wildlife Viewing (birds, whales etc.)	1.6%
Culture (Net)	28.1%	Outdoor Sports (Net)	9.6%
Concerts/Theatre/Dance etc.	10.3%	Hiking	2.5%
Touring/Sightseeing	8.2%	Fishing	2.4%
Historic Sites	7.7%	Golfing	2.2%
Family/Life Events (Net)	33.6%	General (Net)	39.5%
Visit Friends/Relatives (general visit)	25.7%	Shopping	22.4%
Personal Special Event (Anniversary, Birthday)	4.7%	Business	14.5%
Holiday Celebration (Thanksgiving, July 4th etc.)	2.3%	Medical/Health/Doctor Visit	3.1%
Libation/Culinary (Net)	26.5%	Trip Party Composition (Trip-Days)	
Culinary/Dining Experience	25.9%	Avg. Party Size (Adults and Children)	1.72 persons
Winery/Distillery/Brewery Tours	1.5%	One Male Only	28.5%
		One Female Only	22.6%
		One Male and One Female	29.5%
		Two Male or Two Females	5.8%
		Three or More Adults	4.9%
		Adults with Children	8.7%

Austin-Round Rock MSA

MSA			MSA	
Length of Stay (Stays)			Accommodation Type (Person-Days)	
Average Length (Incl. Days)	1.95	<i>days</i>	Paid Accommodations	61.7%
Average Length (Overnight Only)	2.45	<i>nights</i>	Hotel/Motel	51.4%
Day –Trips	51.0%		High-End	19.4%
1-3 Nights	41.1%		Mid-Level	20.5%
4-7 Nights	6.7%		Economy	7.6%
8+ Nights	1.1%		Other Hotel/Motel	3.9%
Primary Mode of Transportation (Person-Days)			Non-Hotel/Motel	10.4%
Air	19.0%		Non-Paid Accommodations	38.1%
Auto Travel (Net)	79.4%		Other Overnight	0.2%
Other Transportation (Net)	1.6%			
Bus	1.1%			
Train	0.3%			
Other	0.3%			
Distance Traveled One-Way from Home (Person-Days)				
Average Distance Traveled	470	<i>miles</i>		
250 Miles or Less	57.9%			
251-500 Miles	11.2%			
500-1000 Miles	10.7%			
1001 Miles or More	20.2%			

Austin-Round Rock MSA

MSA		MSA	
Expenditure Summary (Person-Days)		Expenditure Summary (Person-Days)	
Transportation - Total	34.3%	Avg. Per Person Per Day Spending	\$132.00
Transportation - Excluding Airfare	22.2%	Transportation - Total	\$45.30
Transportation - Airfare	12.1%	Transportation - Excluding Airfare	\$29.30
Transportation - Rental Car	4.4%	Transportation - Airfare	\$87.60
Transportation - Other	17.8%	Transportation - Rental Car	\$40.40
Food	24.3%	Transportation - Other	\$23.40
Lodging - Total	19.1%	Food	\$32.00
Lodging - Room	18.2%	Lodging - Total	\$51.50
Lodging - Services	0.8%	Lodging - Room	\$52.20
Shopping	12.2%	Lodging - Services	\$3.60
Entertainment	7.7%	Shopping	\$16.10
Miscellaneous	2.4%	Entertainment	\$10.20
		Miscellaneous	\$3.20

Austin-Round Rock MSA

MSA			MSA	
Demographic Profile (Person-Days)				
Average Age		44.8	Employment	
	18-34 Years	32.2%	Employed	70.4%
	35-49 Years	27.0%	Retired	13.2%
	50-64 Years	29.3%	Not Employed	16.5%
	65+ Years	11.4%		
Marital Status				
Average HH Income (in \$1,000)		\$98,082	Married	60.0%
	Under \$25,000	12.4%	Never Married	31.1%
	\$25,000-\$49,999	17.0%	Divorced/Widowed	8.9%
	\$50,000-\$74,999	15.0%		
	\$75,000-\$99,999	15.8%	Children in Household	
	\$100,000+	39.8%	Yes	34.9%
			No	65.1%

**Austin-Round Rock MSA
Travel Impacts, 2006-2015p**

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Visitor Spending	3,894	4,364	4,293	5,010	5,396	5,685	6,019
Other Travel*	599	697	692	851	902	968	1,046
Total Direct Spending	4,493	5,061	4,985	5,861	6,299	6,653	7,065
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel	2,106	2,394	2,348	2,871	3,164	3,373	3,686
Private Campground	16	18	19	21	22	22	21
Public Campground	9	10	10	11	11	12	11
Private Home	950	1,070	1,058	1,193	1,236	1,288	1,299
Vacation Home	23	26	26	28	29	30	31
Day Travel	790	846	832	885	934	961	971
Visitor Spending	3,894	4,364	4,293	5,010	5,396	5,685	6,019
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	676	803	753	949	1,080	1,190	1,368
Food Service	812	905	967	1,119	1,219	1,289	1,424
Food Stores	186	214	221	257	275	291	312
Local Tran. & Gas	633	799	670	786	795	793	643
Arts, Ent. & Rec.	354	371	373	411	439	455	487
Retail Sales	817	834	866	954	1,010	1,039	1,098
Visitor Air Tran.	417	438	444	534	578	629	687
Visitor Spending	3,894	4,364	4,293	5,010	5,396	5,685	6,019
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	638	714	760	929	1,009	1,131	1,261
Arts, Ent. & Rec.	185	196	211	247	265	296	331
Retail**	159	165	166	190	201	215	236
Ground Tran.	22	25	24	27	28	30	33
Visitor Air Tran.	15	15	15	17	19	21	25
Other Travel*	64	80	77	95	103	109	123
Total Direct Earnings	1,083	1,194	1,253	1,505	1,624	1,801	2,008
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	25.1	26.3	27.6	30.8	33.0	35.1	37.8
Arts, Ent. & Rec.	9.7	9.9	10.5	11.2	11.9	12.6	13.5
Retail**	6.2	6.3	6.2	6.5	6.9	7.0	7.6
Ground Tran.	0.8	0.8	0.8	0.7	0.8	0.8	0.9
Visitor Air Tran.	0.2	0.2	0.2	0.3	0.3	0.3	0.3
Other Travel*	1.3	1.6	1.5	1.8	1.9	1.8	1.9
Total Direct Employment	43.4	45.1	46.8	51.3	54.7	57.7	62.0
Government Revenue Generated by Travel Spending (\$Million)***							
Local Tax Receipts	139	152	157	183	200	220	248
Visitor	86	97	95	114	127	137	154
Business/Employee	53	55	62	69	74	83	93
State Tax Receipts	222	244	245	280	304	325	355
Visitor	185	202	204	229	248	262	285
Business/Employee	36	42	42	51	56	64	70
Total Direct Gov't Revenue	361	396	402	463	505	545	602

Details may not add to totals due to rounding. *Other Travel includes resident air travel, travel arrangement, and convention/trade shows. **Retail includes gasoline. ***Visitor tax receipts include all direct sales and excise taxes levied on visitor spending. Business/employee tax receipts include local property taxes, the state franchise tax, and sales tax payments attributable to the travel industry generated income of employees.