

Broken Arrow Tourism Asset Inventory Market Research & Strategic Planning



Prepared for:

- Broken Arrow Convention & Visitors Bureau

Destination Research Report:

- Lodging Market Analysis
- Tourism Asset Inventory
- Visitor Survey
- Resident Survey
- Community Leader Survey
- Final Report & Strategic Plan

Study Conducted 2016:

- Lodging Market Analysis – September 2016
- Research Data Presentation & Final Report – January 2017





Broken Arrow, OK

Tourism Asset Inventory

Market Research & Strategic Planning

RESEARCH OBJECTIVE:

To provide a research-based travel market study and strategic plan for Visit Broken Arrow that:

- Identifies the current segmented markets, visitor geo/socio-demographic profile and spending levels
- Identifies the attractors/motivators to visit Broken Arrow, Oklahoma.
- Identifies target markets, growth markets, segments and strategies with the optimal ROI
- Analyzes lodging mix and potential for increases in occupancy
- Develops a comprehensive strategic action plan



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****A detailed asset inventory has been provided in spreadsheet format.**

Visit Broken Arrow

Lodging Market Analysis



Summary & Observations:

- Broken Arrow has 12 lodging properties with approximately 782 rooms. **Three new properties under construction:** La Quinta –80 rooms; Hilton Garden Inn - 107 rooms; Stoney Creek – 187 rooms (**374 new rooms, 48% of current inventory**).
- 37.3% of Broken Arrow's lodging inventory was built prior to 1990. From 1990-1999 two chain-affiliated properties (94 rooms) were developed accounting for 12.0% of room inventory. Since 2000, four additional chain-affiliated properties (396 rooms) have opened representing 50.7% of current room inventory.
- Broken Arrow room demand was consistently increasing over the 5-year period of 2010-2014. STR data shows a **decrease in room demand of 4.3% in 2015**, with **2016 room demand continuing to slip** in month-over-month comparison to 2015, with the exception of the month of February, 2016.
- In 2015, **business/military/other transient accounted for 42% of room nights sold**. Groups including SMERF, social events, conference and meetings, team sports and group tour account for the second highest segment at 39%, while leisure transient accounts for the remaining 19%.
- **Late spring/early summer months run the highest occupancy**, with winter reporting lowest occupancy.
- **Tuesday and Wednesday nights have the highest occupancy** confirming Broken Arrow is a business and group/conference destination. Friday and Saturday nights are next highest while Sunday and Monday nights are slowest year-round.



Broken Arrow, OK Lodging Study Methodology

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Broken Arrow as part of a comprehensive destination analysis commissioned by the City of Broken Arrow Convention & Visitors Bureau (BACVB). A short **questionnaire was sent to all Broken Arrow lodging properties** to estimate the following key metrics for the full calendar 2015: percentage of occupancy driven by nine market segments, 2015 annual occupancy, projected 2016 annual occupancy and percentage of annual room revenue that was non-taxable. Hoteliers were also asked to provide ranking of market segments for BACVB future sales and marketing efforts and top leisure feeder markets. The survey contained two open-ended questions allowing hoteliers to share any noted changes/shifts in room demand as well as future sales/marketing suggestions for the BACVB. Lodging surveys were collected August 2016.

The BACVB provided YSI with a list of all lodging properties in Broken Arrow, Oklahoma. A total of 12 hotel/motel properties with 782 rooms were actively collecting lodging tax at the time of the YSI lodging study and thus received the lodging survey. **Seven hotel/motel properties representing 578 rooms participated in the survey, representing an overall response rate of 73.9%.** This response rate is very good and considered to be a highly predictive sample of the overall market based on the geographic distribution.

The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).

Broken Arrow Lodging Inventory

BACVB provided YSI with a list of all lodging properties located Broken Arrow. All properties are listed in chronological order by open date.

Broken Arrow Lodging- Area / Era	Open Date	# of Rooms
1989 – Prior = 37.3% - 6 properties		292
Broken Arrow Inn	n/a	23
Stone Creek Bed & Breakfast	n/a	3
Canterbury Inn	Jun-80	40
Luxury Inn	Jun-83	39
Clarion Hotel Broken Arrow	Jun-85	103
Econo Lodge – property reflagged in Dec-2013	Jun-85	84
1990 – 1999 = 12.0% - 2 properties		94
Quality Inn	May-95	50
Best Western Kenosha Inn	Jan-99	44
2000 – Present = 50.7% - 4 properties		396
Hampton Inn Tulsa Broken Arrow	May-00	80
Holiday Inn Express & Suites South Broken Arrow	Jul-06	120
Homewood Suites Tulsa South	May-07	99
Towneplace Suites Tulsa Broken Arrow	Dec-08	97
4 hotels do not report to STR		105
<u>8 hotels report to STR</u>	# of Rooms	<u>677</u>
TOTAL – 12 Properties		782

2015 Annual Overall Lodging Market Segmentation

The City of Broken Arrow CVB must closely track the market segments that are driving overnight visitation within the destination. These segments help provide an understanding of the visitor categories that drive the greatest economic impact for the area in occupancy tax collections. Most lodging properties track their guest segmentation through their reservation system. Corporate and group business are tracked closely by rate codes, while leisure segment data is often collected by the management team at the individual properties.

Market Segmentation:

The 2015 segments as reported by the 7 hotel/motel participating properties are presented below in rank order.

2015	Market Segmentation
41.5%	Business – Government –Other Transient
31.1%	Business Transient
7.1%	Government / Military Transient
3.3%	Other
39.3%	Group/Conference/Meeting
12.2%	Team Sports
8.4%	Social events -weddings/reunions/family events
7.9%	Educational / Religious / Fraternal
5.0%	Government groups/Military
4.2%	Conference/Meeting
1.6%	Group Tour / Motorcoach
19.2%	Leisure Transient
19.2%	Leisure Transient

Market Segmentation Observations:

- This data confirms that Broken Arrow is a business destination with slightly over 40% of occupied rooms driven by the business and government/military transient market segments. STR's occupancy data supports this with Tuesday, Wednesday nights driving the highest number of room nights sold by day-of-week.
- Group/conference/meeting also reported strong at 39% overall.
- Leisure visitors to Broken Arrow account for just under 20% of room demand.

Major Shifts or Changing Trends in Room Nights Sold

Hoteliers were asked to provide any insight into major shifts or changing trends in room night sales in Broken Arrow over the last year.

7 properties responded; verbatim comments are below:

- Corporate business has decreased. (2)
- Government booking have decreased. Oil and gas are down significantly.
- Group Sports and Corporate business significantly down.
- Lack of team sports and too many hotels sharing the same amount of room demand which has not increased over the last 10 years.
- Very little or none from Rhema conventions.
- Yes, we are losing Occupancy & ADR in last 5 years. Also, we have completely lost Sport team business.

Leisure Feeder Markets

Hoteliers were asked to rank the top four leisure feeder markets for their hotel/motel property. The markets are ranked by the total number of responses by hoteliers. As a bedroom community of Tulsa, Broken Arrow draws on the many visitors that travel through this area of the state. The top leisure feeder markets identified by hoteliers is shown in the table below:

Top Ranked Leisure Feeder Markets	# of Responses
1. Oklahoma City, OK (117 miles)	5
2. Wichita, KS (189 miles)	4
3. Dallas, TX (269 miles)	3
4. Kansas City, MO (267 miles)	3
5. Little Rock, AR (262 miles)	3
6. Tulsa, OK (15 miles)	2

Future Target Group Segments (Rank Order)

Having established the current market segmentation for those staying in Broken Arrow, OK lodging, YSI asked the lodging property managers to indicate in rank order what markets they would like the BACVB to target for future growth. The prioritized ranking for future direct sales efforts by the BACVB is shown in the table below as provided by the lodging properties that responded to this question.

Market Segment	Rank Order	Rating
Corporate	1 st	2.00
Team Sports	2 nd	3.00
Leisure	3 rd	3.71
SMERF	4 th	3.86
Government	T - 5 th	4.00
Group Tour / Motorcoach	T - 5 th	4.00

Note: Top 3 rankings are highlighted in table above



Hotel/Motel Future Sales and Marketing Suggestions for BACVB

Hoteliers were also asked to provide any suggestions for future sales and marketing efforts for the City of Broken Arrow CVB.

6 properties responded; verbatim comments are below:

- 1. Have tough Regulations on New Construction Hotels 2. Verify that there is need for more rooms. And also Increase the Tap Fee on New Construction hotels . I would suggest to charge tap fee per rooms build. 3. Create Sales & marketing Help task for exciting hotels owners.
- Solicit young sports associations and attend trade shows. Use CVB money to attract group events by offering them seed or incentive money to come to Broken Arrow. Join motorcoach organizations and solicit them to stop over in our city on the way to larger destinations. Advertise to recreational travelers in nearby smaller markets like OKC.
- Sporting tournaments are great for weekend business but weekday business is what we would like to focus on. Bringing in businesses that travel would be helpful.
- Sports tourism trade shows, creation of new sports tournaments that will attract out of town teams to participate (partner with local BA youth sports organizations), use seed money to attract out of town groups to hold their events in Broken Arrow.
- Target government, sports teams, medical facilities.
- We need to attract strong businesses that will bring more people to Broken Arrow. Conference events would also help stimulate the local businesses like hotels and restaurants.

Direct ROI from Lodging Tax Revenue

Hoteliers were asked if they see any direct return-on-investment (ROI) from the current use of lodging tax revenue? All 7 properties that responded to this survey said they do not see any direct return-on-investment.

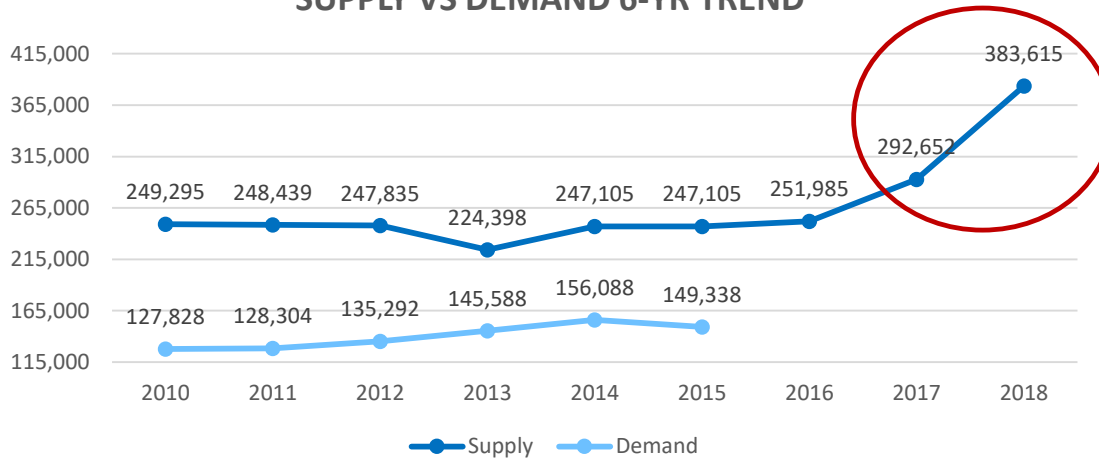
Verbatim Comments:

- Historically lodging tax revenue that has been used in Broken Arrow to promote events that generate no room nights, specifically Rooster Days, Bluebell Ice Cream festival and a \$40,000 ad in the Bass Pro Shops magazine.
- I suggest B.A to ask QT Corporation to build another Expo Center in B.A. It is very Important to B.A to compare to Muskogee town. I think B.A will learn what went wrong in past 5 years and Why? Because Muskogee town is under similar track like B.A but not as bad as B.A.
- The CVB has traditionally invested dollars in events that do not generate room nights. As more hotels have opened in markets close by such as Bixby, 81st street and on the 71st street corridor, travelers have more choices of hotels to stay in and do not choose to stay in Broken Arrow like they once did. It is imperative that the city invest dollars in ways that will generate high occupancy at Broken Arrow hotels, thus increasing the collection of occupancy and sales tax revenue. Rooster Days and events at BAPAC are nice for bringing folks in from surrounding communities but they drive in and out and do not spend the night.

Broken Arrow STR Data

Young Strategies, Inc. purchased lodging data from STR (Smith Travel Research) in the form of a 6-year trend report as well as a 365-daily data report for all STR-participating hotel/motel properties located in Broken Arrow, OK (677 rooms from 8 chain affiliated hotels). The STR data does not include the hotel/motel properties. All tables and charts shown on the following pages have been created from the data provided in the STR reports.

SUPPLY VS DEMAND 6-YR TREND



Observations:

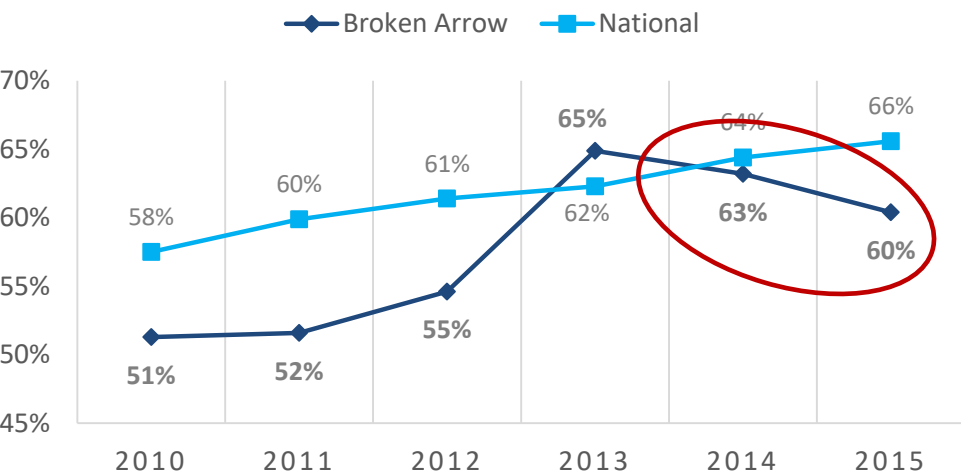
- STR Room supply shows a dip in 2013 due to the sale, re-flagging of 84 rooms of the Clarion hotel as an Econo-Lodge in December, 2013.
- Significant growth in room supply is coming with three new hotels in 2016/17.
- Room demand peaked in 2014, declined in 2015 due to oil/gas pull-back and is reported by hotels to be soft in 2016.
- *NOTE: Annual Supply forecasts for 2016 and 2017 include calculations based on the estimated opening dates of the three hotels currently under construction.
- 374 new rooms X 365 nights = 136,510 new room nights to sell.

Supply vs Demand 2010 - 2017

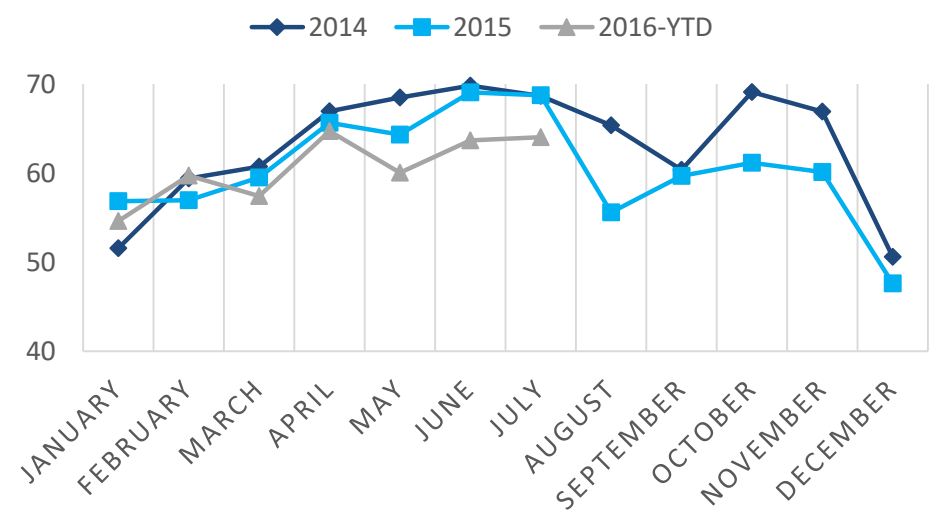
Year	Supply	% of Change	Demand	% of Change
2010	249,295	~	127,828	~
2011	248,439	-0.3%	128,304	0.4%
2012	247,835	-0.2%	135,292	5.4%
2013	224,398	-9.5%	145,588	7.6%
2014	247,105	10.1%	156,088	7.2%
2015	247,105	0.0%	149,338	-4.3%
2016	251,985*	2.0%		
2017	292,652*	16.1%		
2018	383,615*	31.0%		



ANNUAL OCCUPANCY TREND 2010-2015



MONTHLY OCCUPANCY (%)



Annual Occupancy Trend 2010 – 2015				
	BrokenArrow (STR)	% of Chg	National	% of Chg
2010	51.3%	~	57.5%	~
2011	51.6%	0.7%	59.9%	4.2%
2012	54.6%	5.7%	61.4%	2.5%
2013	64.9%	18.8%	62.3%	1.5%
2014	63.2%	-2.6%	64.4%	3.3%
2015	60.4%	-4.3%	65.6%	1.7%

Observations:

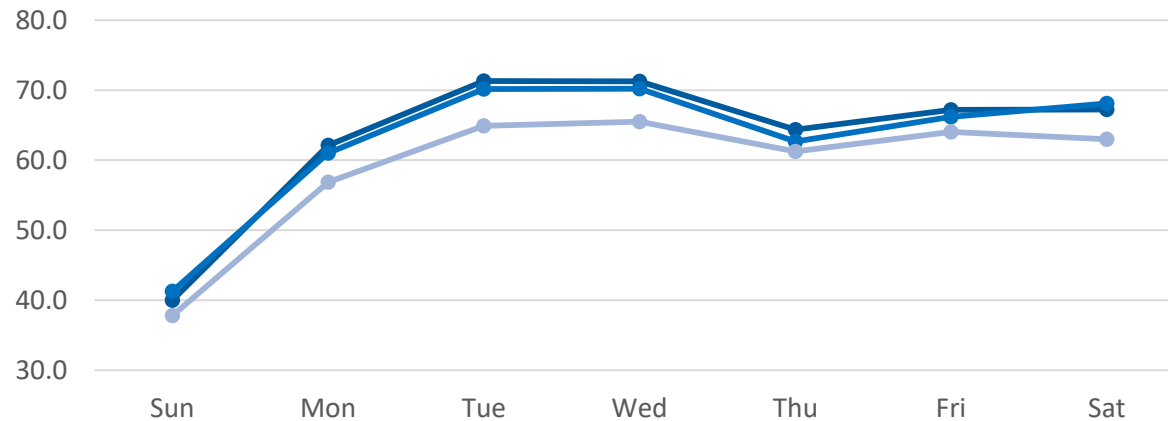
- The significant spike in room occupancy in 2013 can be directly linked to the re-appropriation of 84 rooms of the Clarion Hotel as an Econo-Lodge in December, 2013. Room demand also increased 7.6% during this period, contributing to the spike.
- Room demand continued to increase in 2014, however with the addition of the Econo-Lodge rooms back into STR’s room supply, occupancy falls to 63%.
- Room demand in Broken Arrow decreases 4.3% in 2015 resulting in another decrease in occupancy illustrated in the table above.
- Broken Arrow’s 2016 monthly room demand has continued to perform below prior year levels with every month down from 2015, with the exception of February. A more detailed table with monthly occupancy percentages can be found on the following page.

Three Year Occupancy (%)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Year
Aug 13 - Jul 14	40.0	62.1	71.3	71.2	64.3	67.2	67.2	63.3
Aug 14 - Jul 15	41.3	61.0	70.2	70.2	62.7	66.2	68.1	62.8
Aug 15 - Jul 16	37.8	56.9	64.9	65.5	61.2	64.1	63.0	59.0
Total 3 Yr	39.7	60.0	68.8	69.0	62.7	65.8	66.1	61.7

3-YR Day of the Week Occupancy % (STR)

Aug 13 - Jul 14 Aug 14 - Jul 15 Aug 15 - Jul 16



Monthly Occupancy Trend (STR)

Year	2014	2015	2016-YTD
January	51.6	56.8	54.6
February	59.4	57.0	59.7
March	60.7	59.5	57.4
April	66.9	65.7	64.7
May	68.5	64.3	60.1
June	69.8	69.1	63.7
July	68.7	68.8	64.1
August	65.4	55.6	
September	60.4	59.7	
October	69.1	61.2	
November	66.9	60.1	
December	50.6	47.6	

Observations:

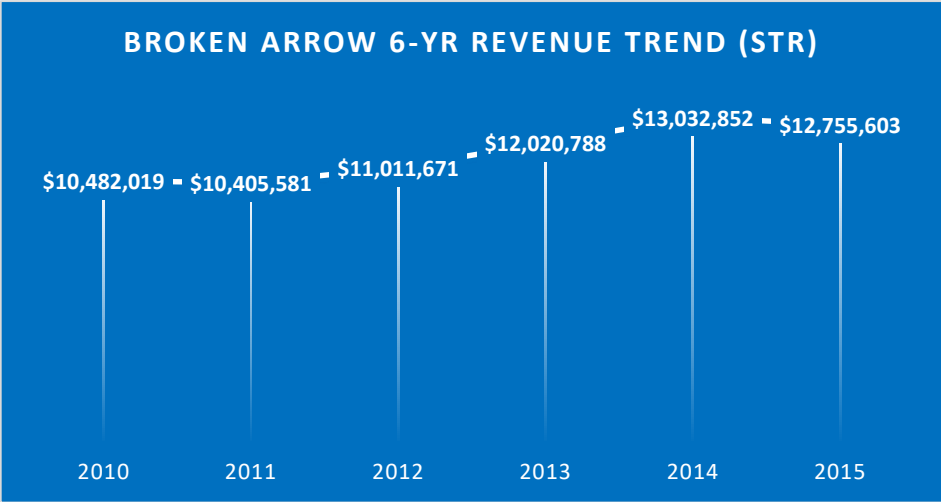
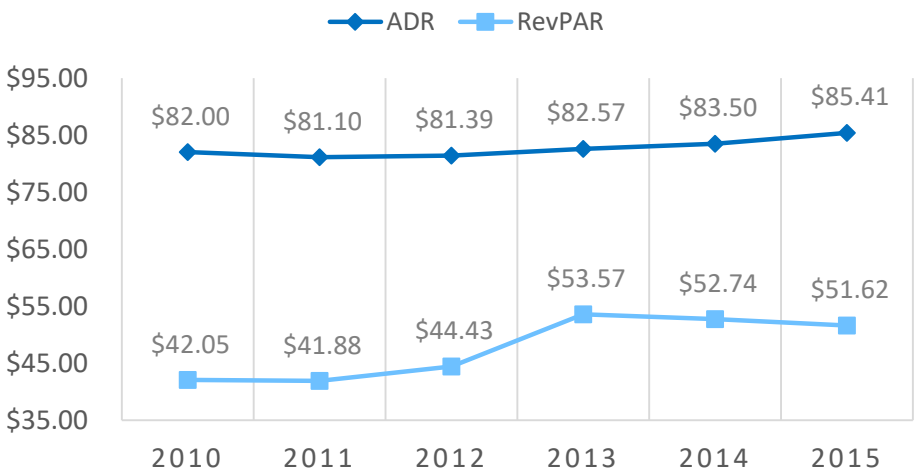
- January and December are reported as the slowest months in Broken Arrow lodging occupancy, while highest occupancy percentages are consistently reported in months May-June. Occupancy percentages in 2016 were reported below 2015 in a month-to-month comparison, with the exception of February.
- Data shows Tuesday and Wednesday nights run highest occupancy for the week, followed by Friday and Saturday nights. This data supports the findings in the YSI survey whereas business-government-other segments accounted for 42% of room nights sold and group/conference/meetings accounted for 39% of room nights. Leisure accounted for the remaining 19%. Sunday and Monday nights are reported as lowest occupancy for the week which is typical in most destinations.
- Sunday, Monday and Thursday nights run lowest occupancy levels indicating room for growth in both the leisure and business meeting markets.

Hotel/Motel 6-YR Trend Broken Arrow ADR and Revenue (STR)

ADR vs RevPAR 2010 - 2015				
Year	ADR	% of Chg	RevPAR	% of Chg
2010	\$82.00	~	\$42.50	~
2011	\$81.10	-1.1%	\$41.88	-0.4%
2012	\$81.39	0.4%	\$44.43	6.1%
2013	\$82.57	1.4%	\$53.57	20.6%
2014	\$83.50	1.1%	\$52.74	-1.5%
2015	\$85.41	2.3%	\$51.62	-2.1%

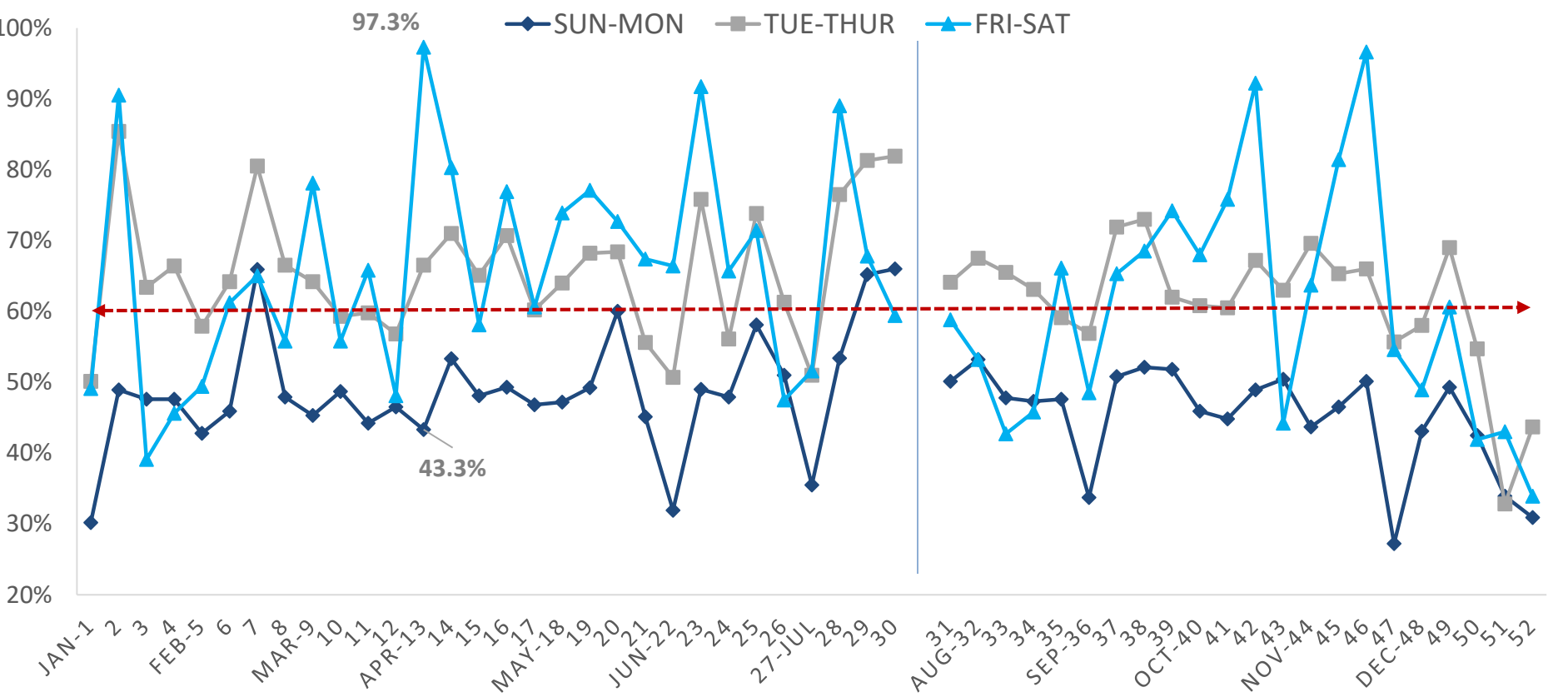
Annual Revenue Trend 2010 - 2015			TAX Calculations		
Year	STR Revenue	% of Chg	State 4.5%	City 3%	Hotel Tax 4%
2010	\$10,482,019				
2011	\$10,405,581	-0.7%			
2012	\$11,011,671	5.8%			
2013	\$12,020,788	9.2%			
2014	\$13,032,852	8.4%	\$586,478	\$390,985	\$521,314
2015	\$12,755,603	-2.1%	\$574,002	\$382,668	\$510,224

ADR VS REVPAR TREND 2010-2015 (STR)



• Hoteliers increased ADR (Average Daily Rates) in 2012 through 2015. The increases in ADR helped to hold RevPAR (Revenue Per Available Room) on a positive trend as well. While the table and graph above show decreases in RevPAR in 2014-2015, it is important to note these figures show continued profitability overall. Note: STR's change to Broken Arrow's lodging room inventory caused exaggerated increases in all lodging metrics in 2013 and must be taken into account. Analysis of these metrics is important as the lodging industry tracks RevPAR as a key indicator of lodging success and profitability.

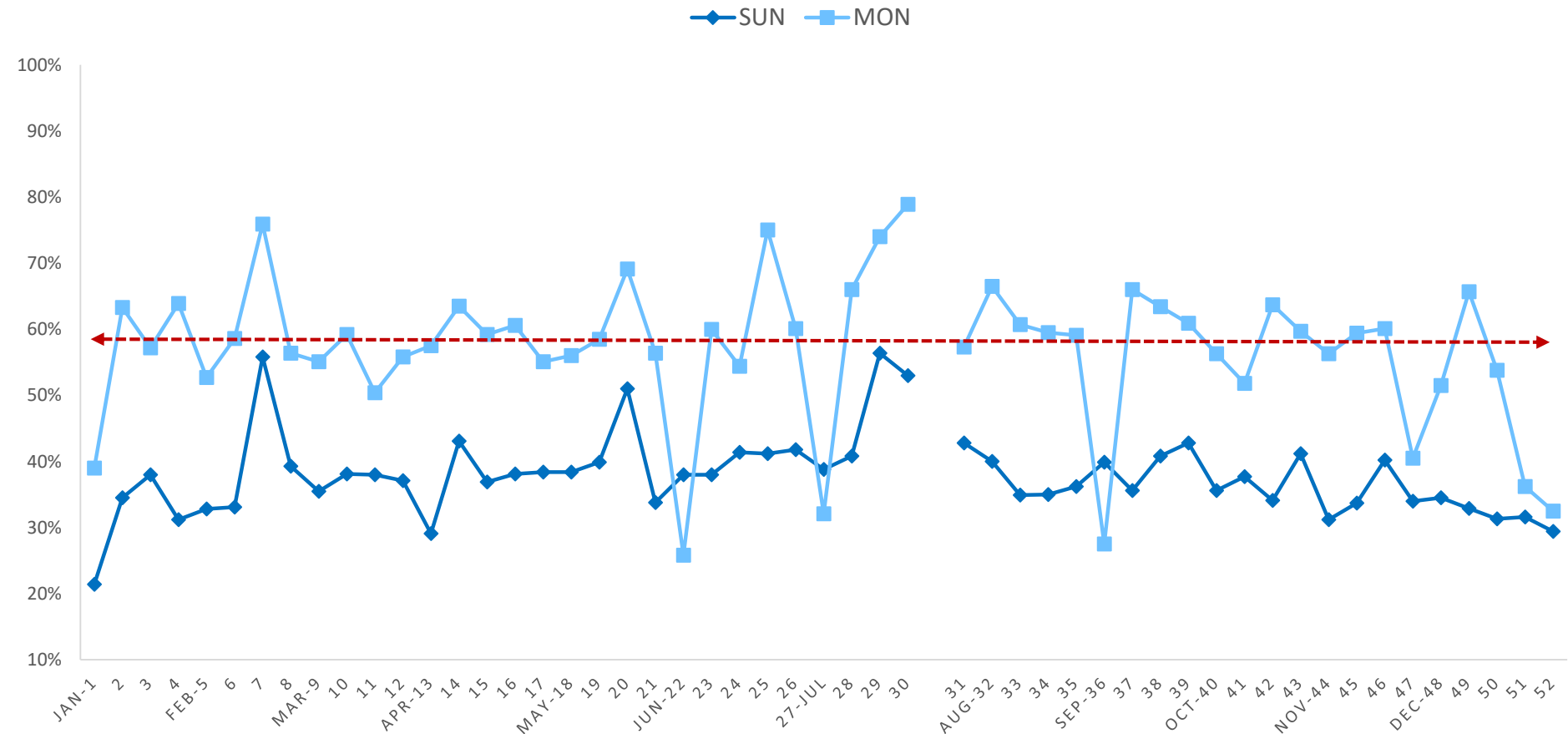
52 WEEK OCCUPANCY TREND
JANUARY-JULY, 2016 & AUGUST-DECEMBER, 2015



Daily Occupancy %'s	# of days	% of YR
Days reported at 60% - 69%	114	31.2%
Days reported at 70% - 79%	61	16.7%
Days reported at 80% - 89%	26	7.1%
Days reported at 90% - 100%	11	3.0%

Total # of Days 60% or higher occupancy
212 nights = 58.1% of the year

SUNDAY-MONDAY OCCUPANCY % JANUARY-JULY, 2016 & AUGUST-DECEMBER, 2015

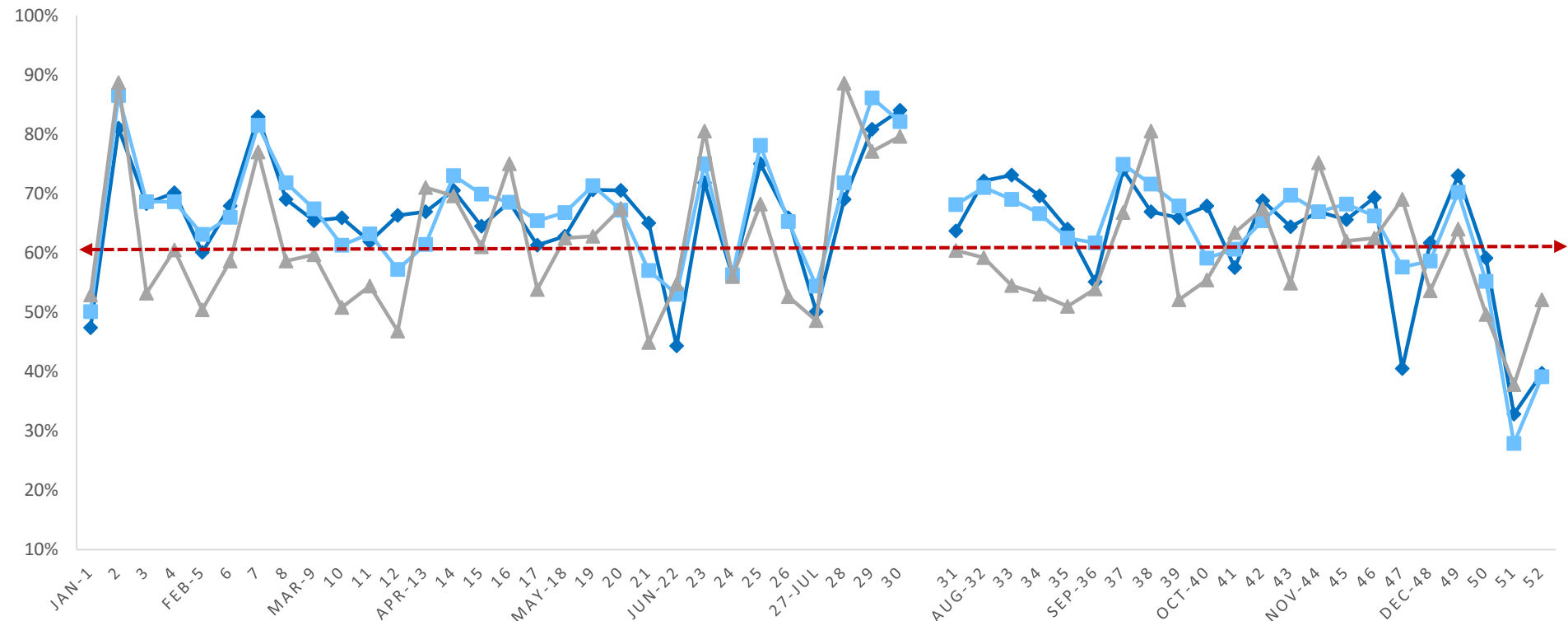


Observations:

- Sunday and Monday occupancy percentages are reported below the 60% occupancy mark for most of the calendar year.
- It should be noted, occupancy on Monday nights was reported in a range of 3-33% higher than Sunday nights, most weeks of the year. The average difference was calculated at 19.5%.

MIDWEEK (TUESDAY-THURSDAY) OCCUPANCY % JANUARY-JULY, 2016 & AUGUST-DECEMBER, 2015

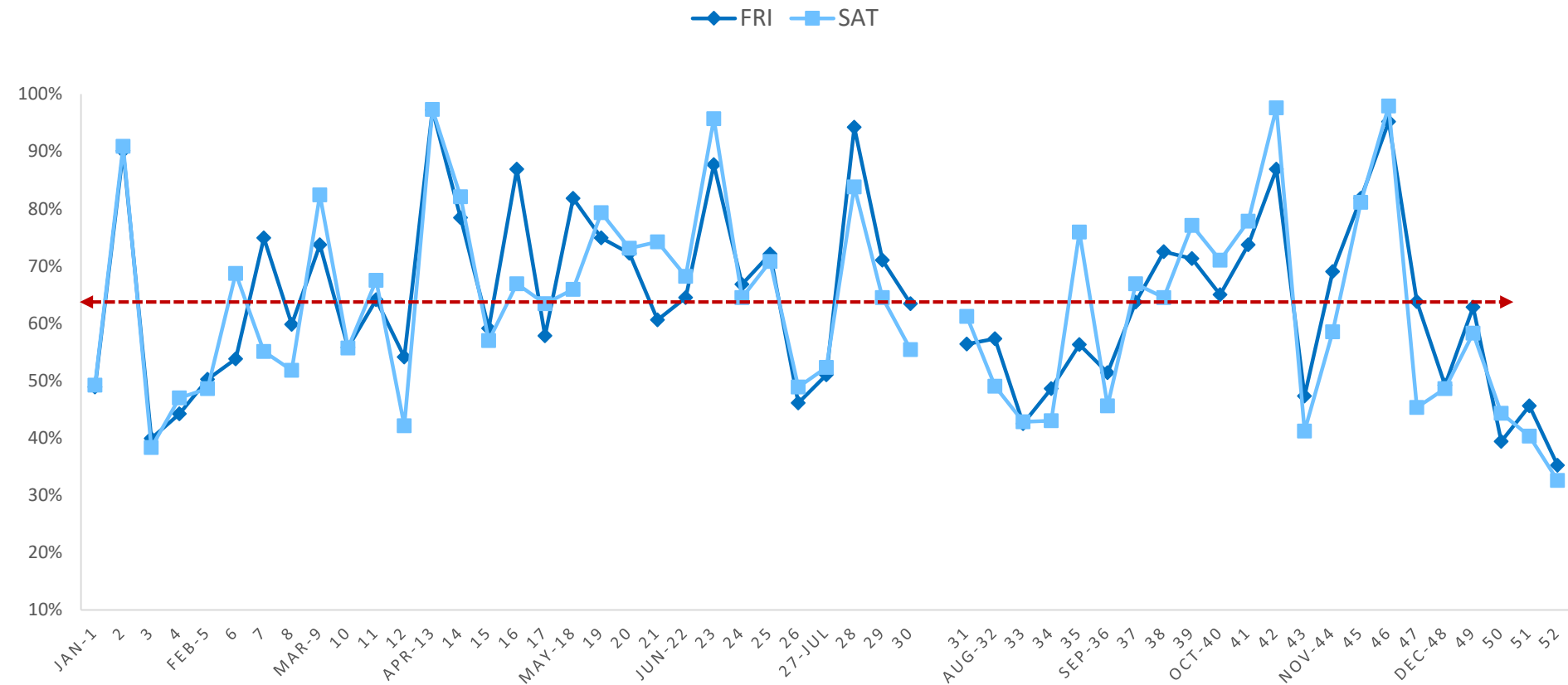
◆ TUES ■ WED ▲ THURS



Observations:

- Average occupancy %'s midweek (Tuesday through Thursday) are very strong for Broken Arrow lodging properties most of the year.
- Tuesday and Wednesday nights report highest occupancy levels in Broken Arrow lodging properties with the majority of the year reporting above the critical 60% occupancy mark.

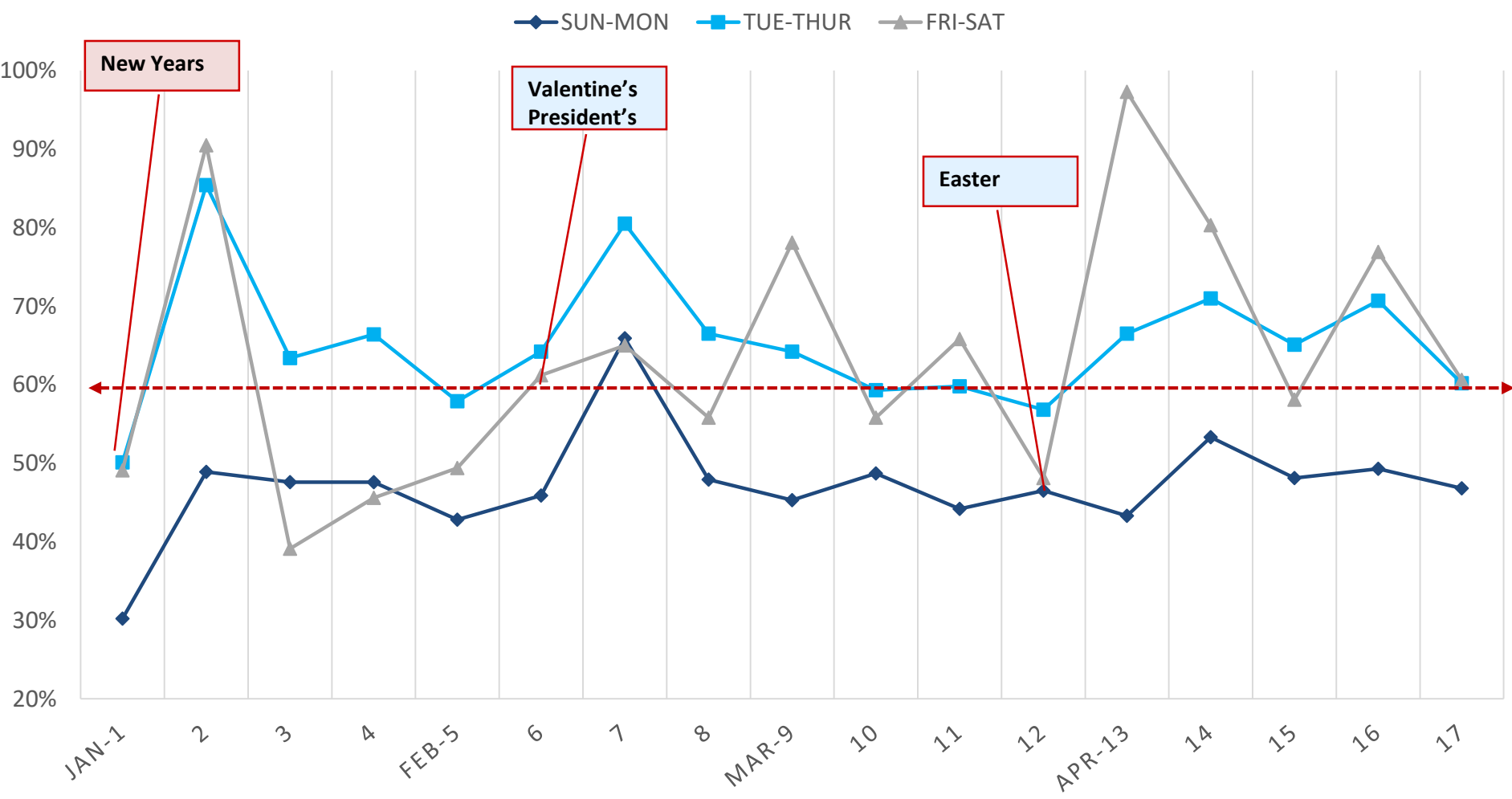
WEEKEND (FRIDAY-SATURDAY) OCCUPANCY % JANUARY-JULY, 2016 & AUGUST-DECEMBER, 2015



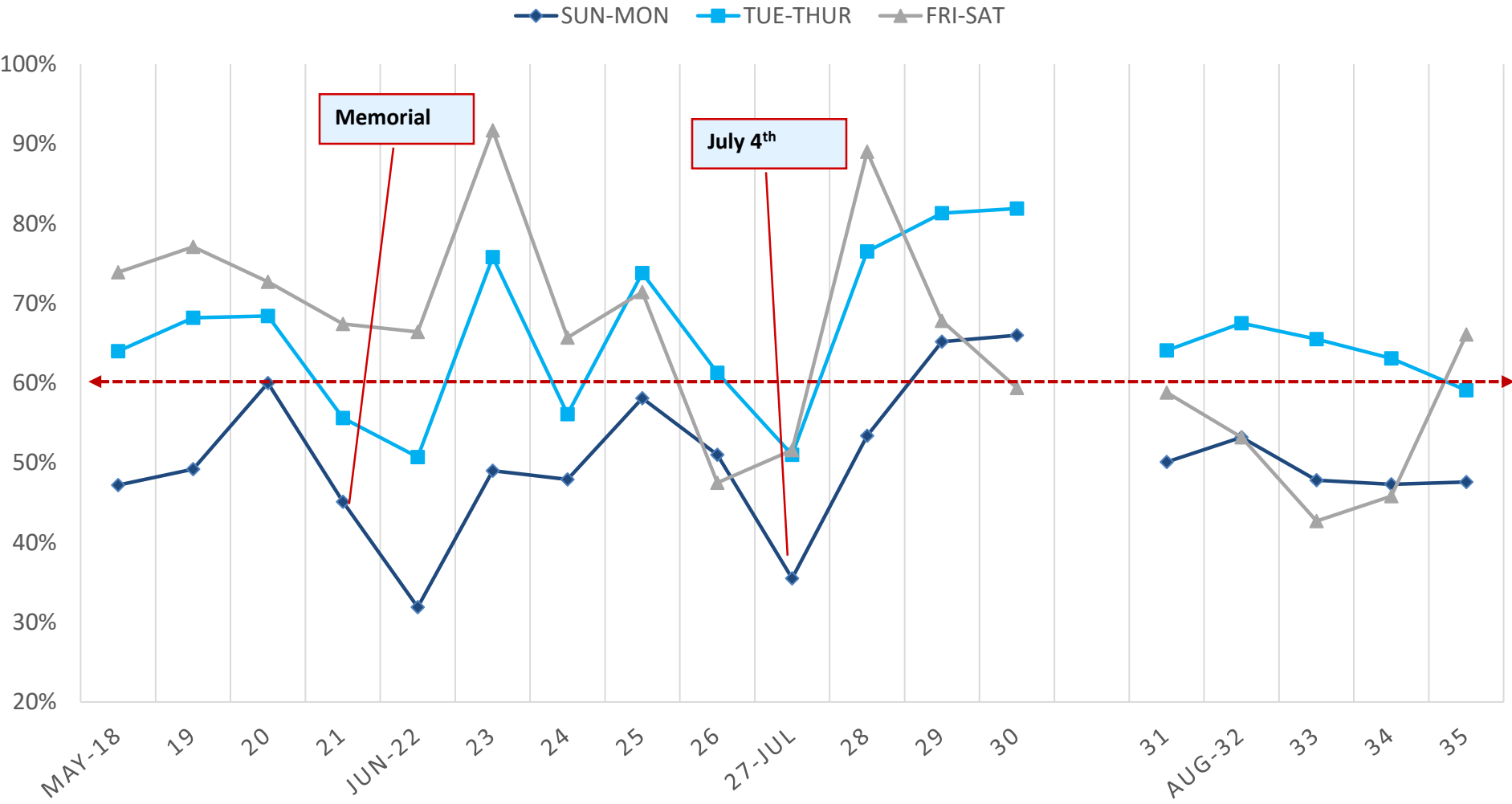
Observations:

- Weekend occupancy is very high in Broken Arrow lodging in the majority of the year. Need periods can be identified in the graph above primarily during the months of January – March, 2016 with additional periods identified in August, September, some weeks in November and all of December.

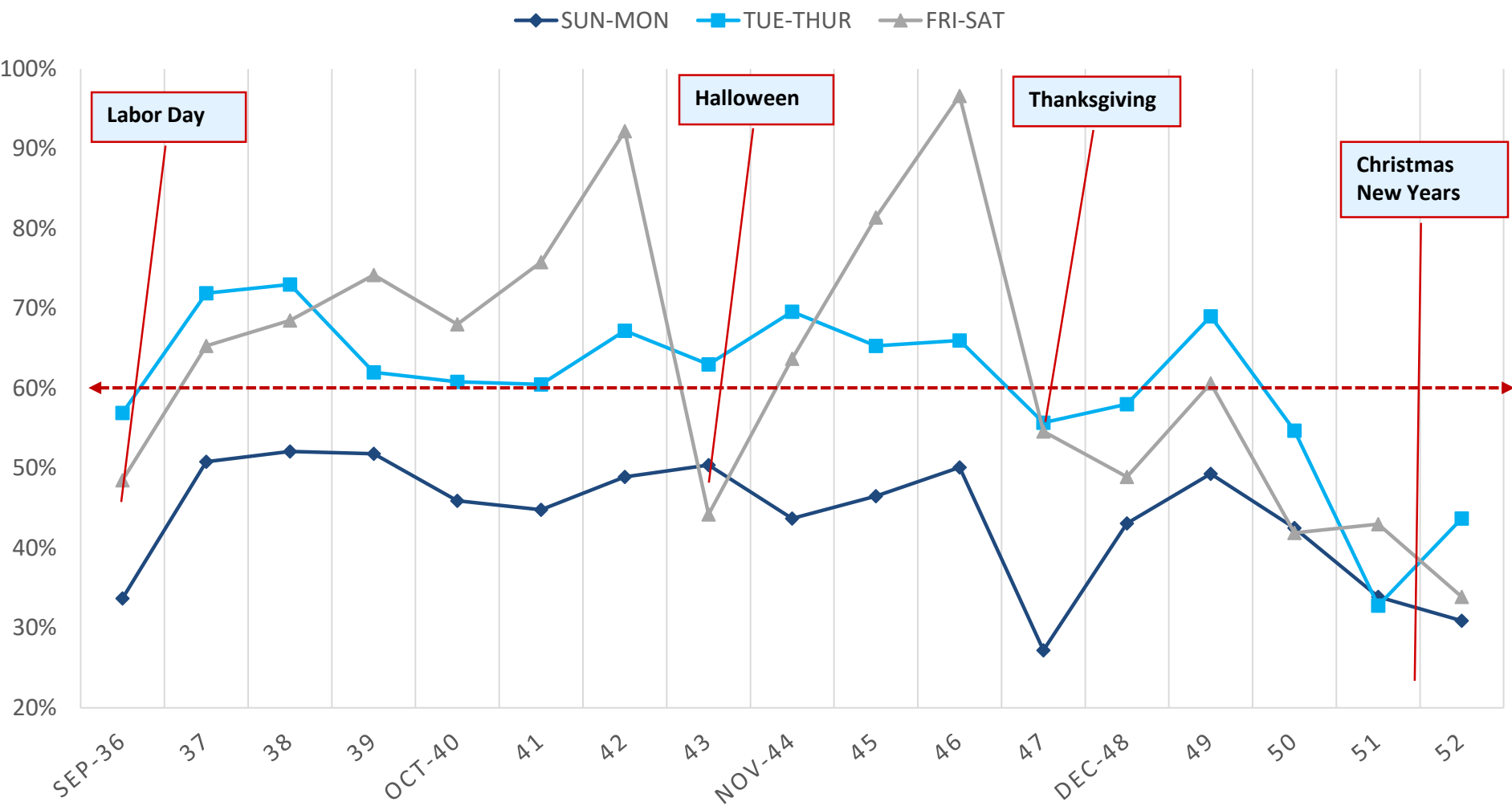
JANUARY- APRIL, 2016 OCCUPANCY TREND



MAY-JULY, 2016 & AUGUST, 2015 OCCUPANCY TREND



SEPTEMBER-DECEMBER, 2015 OCCUPANCY TREND



Visit Broken Arrow

Lodging Market Analysis

Google

Broken Arrow, OK hotels

←

Sun, Nov 20

Mon, Nov 21

Price ▾

Rating ▾

Hotel class ▾

Sort by: Relevance Price Rating

Residence Inn Tulsa South

\$116

Ad 4.2 ★★★★★ 3-star hotel

Relaxed suites with full kitchens & pull-out sofas, plus a tennis court, free breakfast & a pool.

La Quinta Inn & Suites Tulsa - Catoosa

\$94

Ad 4.4 ★★★★★ 3-star hotel

Colorful, contemporary lodging with an indoor pool, plus free continental breakfast & WiFi.

Holiday Inn Express & Suites Tulsa S Broken Arr...

\$98

4.6 ★★★★★ 3-star hotel

Casual accommodations with an indoor pool & mini golf, plus free hot breakfast & WiFi.

Clarion Hotel

\$63

3.8 ★★★★★ 2-star hotel

Hotel offering classic, relaxed rooms with free Wi-Fi, plus a restaurant, gym & heated outdoor pool.

Homewood Suites by Hilton Tulsa-South

\$89

4.1 ★★★★★ 3-star hotel

Extended-stay hotel offering suites with kitchens & free WiFi, plus an outdoor pool.

Best Western Kenosha Inn

\$79

4.1 ★★★★★ 2-star hotel

Straightforward hotel offering free WiFi, breakfast & parking, plus a pool & a fitness center.

Map showing hotel locations in Broken Arrow, OK. A red dashed line highlights a central area containing several hotels. A blue star is located near the bottom center of the map, near the intersection of Broken Arrow S Loop and Creek Turnpike.

Hotel Name	Price
Residence Inn Tulsa South	\$116
La Quinta Inn & Suites Tulsa - Catoosa	\$94
Holiday Inn Express & Suites Tulsa S Broken Arr...	\$98
Clarion Hotel	\$63
Homewood Suites by Hilton Tulsa-South	\$89
Best Western Kenosha Inn	\$79
WoodSpring Suites Signature Broken Arrow	\$54
Super 8 Tulsa OK	\$54
Best Western Plus Woodland Hills Hotel...	\$76
Candlewood Suites Tulsa	\$75
Hilton Garden Inn Tulsa South	\$79
Fairfield Inn & Suites Tulsa Southeast/...	\$73
Hampton Inn & Suites Tulsa South-Bixby	\$80
Holiday Inn Express & Suites Tulsa S...	\$88
Homewood Suites by Hilton Tulsa-South	\$89

2016 & 2017 Forecasts

STR Reporting Broken Arrow Hotels (does not include 4 non-reporting hotels/105 rooms)	2016	2017
Broken Arrow Daily Lodging Room Inventory	690*	802
Broken Arrow Annual Lodging Room Inventory	251,985*	292,652*
2017 Increase in Room Supply		40,667
Impact of Flat demand		
Estimated room demand (based on 2015 = 60.4%, 149,338 room nights sold)	58% 146,151	50% 146,326

Observations:

- Significant growth in room supply is coming with three new hotels in 2016/17.
- *NOTE: Annual Supply forecasts for 2016 and 2017 include calculations based on the estimated opening dates of the three hotels currently under construction.

Conclusions:

- Room supply is growing while demand for rooms is declining = hoteliers are VERY concerned about new hotels.
- Room nights are being lost to Tulsa hotels just across the line. Tulsa is more aggressive than before, reorganized.
- Broken Arrow must increase focus on marketing the destination – advertising and group sales.
- The CVB must partner with the hotels to drive high ROI from hotel tax revenue. Focus on slower seasons.
- Master planning for the city must address ATTRACTORS- what drives the overnight visit in the future.
- Visitor research is coming with a detailed strategic plan for the CVB.

Visit Broken Arrow

Visitor Profile Research



Summary & Observations:

- Typical overnight leisure travel party age composition ranges 35 to 54 and is one to two couples. Most are highly educated (87.3%) having some college education and are retired or professionals.
- The majority of travelers to Broken Arrow come from the **3 to 5 hour drive radius among contiguous states**.
- **30% of overnight leisure visitors report it being their first visit to Broken Arrow.** It is important to drive more first-time visitation since those travelers tend to stay longer and spend more.
- **Overall trip satisfaction for visitors to Broken Arrow is high;** Overnight (4.43) and Daytrip (4.23) on a 5.0 scale. Visitor amenities that rated the highest among both segments were: appeal of shopping & merchandise, lodging value, and quality of outdoor experiences.
- Overall Spending per Travel Party: **Leisure overnight visitor = \$851.07 (\$303.95 per day); Leisure daytrip visitor = \$254.09**
- Both overnight and daytrip respondents report friends or family referral as a top source of information for planning and inspiration which indicates the power of word-of-mouth in destination marketing.

Purpose

The City of Broken Arrow Convention & Visitors Bureau (BACVB) retained Young Strategies Inc. to conduct scientific research to develop a visitor profile and strategic plan for tourism in Broken Arrow, Oklahoma. The research project will ultimately create an overall strategic destination action plan which identifies the best roadmap with a list of priorities to capture increased market share and compete effectively in the marketplace. Maximizing ROI through the allocation of resources based on research data will be the focus of a strategic action plan. Secondly, YSI will assess the current segmentation of overnight visitation and visitor behavior to Broken Arrow. Finally, the YSI team will conduct an intensive analysis of Broken Arrow as a destination with the goal of creating a list of development/policy/organizational objectives which should be achieved in order to overcome market shortfalls.

Methodology

An online survey instrument was prepared by the Young Strategies research team and approved by the City of Broken Arrow CVB. Recipients were invited to take a visitor survey and be entered into a chance to win one of two \$250 VISA gift cards. The survey was deployed through email invitations, weblinks and Facebook links provided to 9 Broken Arrow travel industry partners who deployed the survey (number of responses to follow): BACVB inquiry database-326, Girls Softball-39, The Museum Broken Arrow-23, Chamber-9, SJS Hospitality-9, Military History Center-4, Rhema-1, BA Youth Baseball-1. The survey was also deployed to leads purchased through a third party marketing firm, which generated an additional 197 surveys from people who had visited Broken Arrow.

A total of 609 surveys were received, of those:

- **251 were visitors to the area**
- **37 were residents of a neighboring county**
- **316 were residents of Broken Arrow**
- **5 had never visited Broken Arrow**



Overall Survey Respondent Demographics

Demographics	Overnight N=122	Daytrip N=107
Generational Group		
24 and under	0.8%	0.0%
25-34	25.8%	18.3%
35-44	21.7%	24.0%
45-54	25.0%	26.9%
55-64	15.0%	16.3%
65-74	10.8%	12.5%
75 or older	0.8%	1.9%
Gender		
Female	50.4%	54.8%
Male	49.6%	45.2%
Occupation	Professional/technical – 13.8% Education – 11.9% Healthcare industry – 11.9% Self-employed – 11.0% Banking / Financial – 7.3%	Retired – 12.7% Professional/technical – 11.8% Self-employed – 11.8% Education / Professor / Teacher – 8.8% Management / Executive – 7.8%
Level of Education		
College Degree	42.4%	42.3%
Graduate School	28.0%	27.9%
Some College	16.9%	22.1%
Ethnicity		
White/Caucasian	78.1%	79.6%
Prefer not to answer	2.6%	2.9%
American Indian or Alaskan Native	6.1%	5.8%
Hispanic or Latino	7.0%	2.9%
Asian or Pacific Islander	5.3%	4.9%
Black or African American	5.3%	7.8%

Trip Planning Sources – Overnight Visitors

Please review the following list then tell us if each INSPIRED and/or were used for TRIP PLANNING purposes for your most recent trip to Broken Arrow, Oklahoma.

Overnight n=110	Inspired Your Visit	Used for trip planning
Friends or family referral n=79	69	30
TripAdvisor reviews n=54	33	30
Oklahoma State Travel Guide n=37	23	20
www.visitbrokenarrowok.com n=43	21	30
FaceBook n=36	20	18
Work / conference / event provided n=24	17	9
Yelp / Google+ / referrals / etc. n=32	16	19
Broken Arrow Visitors Guide n=33	15	23
Welcome center / visitor center n=23	14	11
Travel story in newspaper/magazine/online/television n=18	12	8
Online travel deal – Groupon, TravelZoo, etc. n=21	11	12
None applicable n=14	11	7
www.travelok.com n=23	10	17
AAA / Fodors / Zagat type guidebooks n=19	10	10
Guide to Green Country n=14	9	6
Online travel sites – Travelocity, Expedia, Kayak, etc. n=28	8	21
Ads on misc. websites / magazines n=14	5	9

Observations:

- Friends or family referral, Trip Advisor reviews and visitbrokenarrowok.com were the top sources reported by overnight visitors for trip planning.
- Friends or family referrals, TripAdvisor reviews and the Oklahoma State Travel guide were the top 3 sources of information that inspired respondents to visit Broken Arrow.
- Friends or family referral was the top response from both categories which indicates the power of word-of-mouth in destination marketing.

Trip Planning Sources - Daytrippers

Please review the following list then tell us if each INSPIRED and/or were used for TRIP PLANNING purposes for your most recent trip to Broken Arrow, Oklahoma.

Daytrip n=102	Inspired Your Visit	Used for trip planning
Friends or family referral n=55	49	14
FaceBook n=32	23	11
None applicable n=24	20	17
Work / conference / event provided n=24	17	11
www.visitbrokenarrowok.com n=17	11	8
Broken Arrow Visitors Guide n=16	11	8
Oklahoma State Travel Guide 19	10	11
Travel story in newspaper/magazine/online/television n=14	10	5
Yelp / Google+ / referrals / etc. n=17	9	12
TripAdvisor reviews n=16	9	8
www.travelok.com n=14	7	10
Online travel sites – Travelocity, Expedia, Kayak, etc. n=10	6	6
Ads on misc. websites / magazines n=12	6	6
Online travel deal – Groupon, TravelZoo, etc. n=11	6	5
Guide to Green Country n=10	5	6
Welcome center / visitor center n=10	5	5
AAA / Fodors / Zagat type guidebooks n=8	4	4

Observations:

- Friends or family referral, FaceBook, and work/ conference/ event provided were the top sources reported by daytrip visitors for trip planning as well as inspiration.
- Friends or family referral was the top response from both categories which indicates the power of word-of-mouth in destination marketing.



Technology and Social Media Usage

How did you use the following social media sites or applications as part of your travel to Broken Arrow, Oklahoma?

Observations:

- The ranking seen here is very typical as seen in other YSI studies. GPS/Google Maps, Facebook and Trip Advisor ranks highest among leisure overnight and daytrip travelers while traveling.

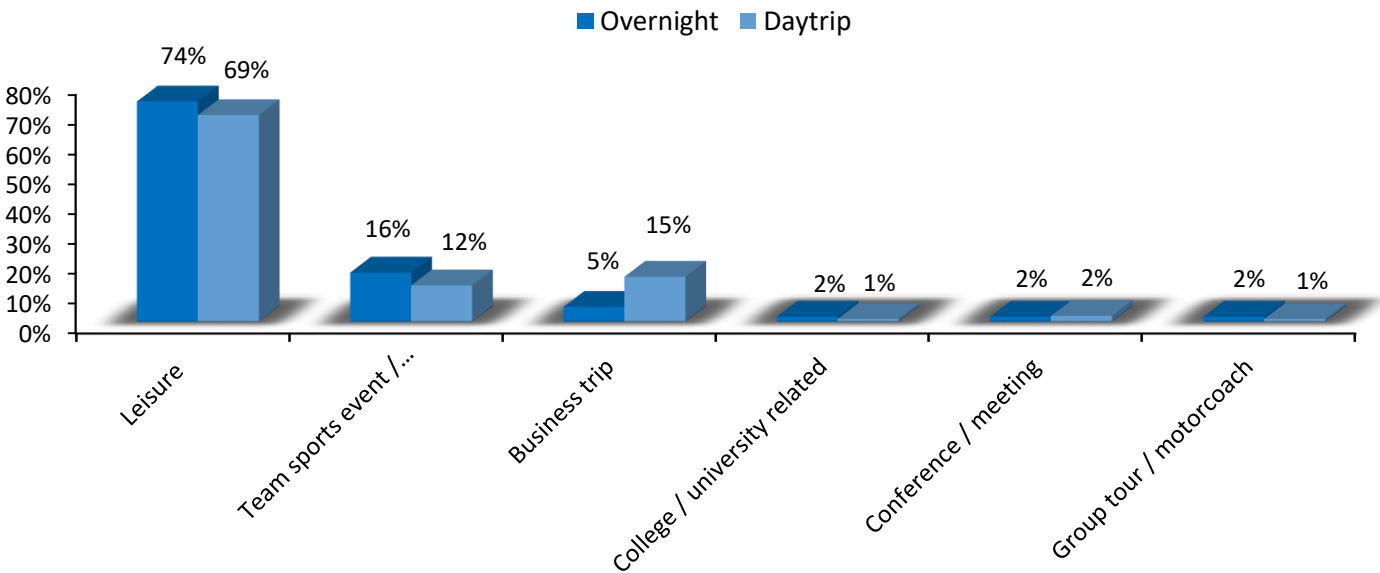
Overnight n=113	Use While Traveling	Never Use
GPS / Google Maps n=102	94	10
Facebook n=93	55	40
TripAdvisor n=80	52	28
Photo Sharing n=76	37	40
Yelp n=72	36	37
Groupon n=72	29	43
Instagram n=74	26	48
YouTube n=61	23	38
Twitter n=67	20	48
Pinterest n=66	19	49
Urbanspoon n=66	15	52
Travel Blogs n=62	13	49

Daytrip n=102	Use While Traveling	Never Use
GPS / Google Maps n=81	64	18
Facebook n=77	40	37
TripAdvisor n=65	27	39
Yelp n=62	19	44
Urbanspoon n=59	18	41
Groupon n=65	17	49
Photo Sharing n=63	17	47
YouTube n=58	17	41
Instagram n=64	16	49
Twitter n=58	14	44
Pinterest n=59	13	49
Travel Blogs n=58	9	49

Leisure Travel Purpose

Choose the main purpose for your most recent trip to Broken Arrow, Oklahoma?

Overnight n=122; Daytrip n=107



Observations:

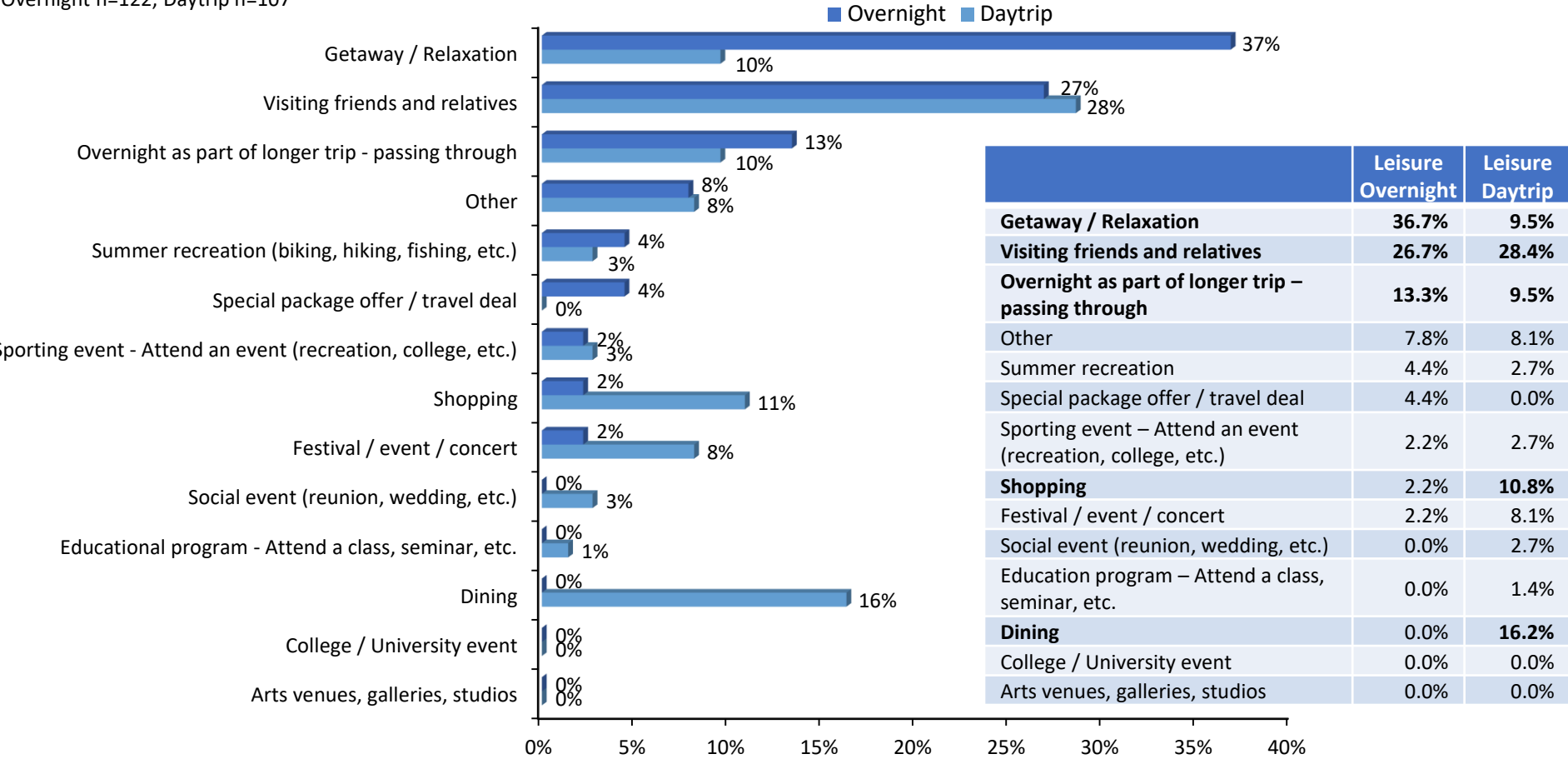
- Surveys with B.A. lodging properties revealed that business travelers occupy 41.5% of the current room nights sold, group/conferences occupy 39.3% and Leisure/transient travelers occupy 19.2%.
- A healthy lodging market exceeds 65% occupancy and has a balanced mix of the three segments
- B.A. hoteliers identified Group (meetings & sports) and leisure as the markets with the best potential for growth.

	Leisure Overnight	Leisure Daytrip
Leisure - (visited Broken Arrow, Oklahoma attractions, outdoor recreational activities, sight-seeing, visiting friends & relatives, etc.)	73.8%	69.2%
Team sports event / tournament (recreation/college, etc.)	16.4%	12.1%
Business trip	4.9%	15.0%
College / university related (drop off/pick up students, parents weekend, orientation, college event, etc.)	1.6%	0.9%
Conference / meeting	1.6%	1.9%
Group tour / motorcoach	1.6%	0.9%

Leisure Travel Purpose

Regarding your LEISURE trip to Broken Arrow, what was the SPECIFIC reason for your trip?

Overnight n=122; Daytrip n=107



- Observations:**
- Getaway/relaxation, visiting friends and relatives and passing through were reported as the top reason for overnight and daytrip leisure visits. Therefore, Broken Arrow does have the potential to inspire people to visit for a getaway.
 - Dining also was reported by daytrip leisure visitors as a reason to visit Broken Arrow.
 - “Other” verbatim responses are listed in the addendum to this report.

Travel Party Composition

What was the composition of your travel party?

Observations:

- Travel parties are typically comprised of primarily adults only (78%), with about 22% families with children. The percentage of family travel is much higher in Broken Arrow in both the overnight and daytrip visitor segments.
- Age categories were as follows : Senior Adults 73+, Older Adults 52-72, Mature Adults 36-51, Adults 24-35, Young Adults 19-23, Children 0-18
- Visit Broken Arrow has the greatest opportunity to market to adult couples for year-round visitation and families with children for weekends, holidays and summer months.

	Overnight n=123	Daytrip n=108
Families	50.3%	33.8%
Children	0.8%	0.9%
Adults		
Older Adults	17.1%	29.9%
Adults	9.7%	5.6%
Mature Adults	7.2%	10.2%
Older Adults + Mature Adults	3.2%	7.4%
Mature Adults + Adults	2.4%	0.0%
Older Adults + Adults	1.5%	6.7%
Senior Adults	1.5%	2.6%
Senior Adults + Older Adults	1.5%	1.8%
Senior Adults + Mature Adults	0.0%	0.9%
No Response	4.1%	0.9%
Total	100.0%	100.0%



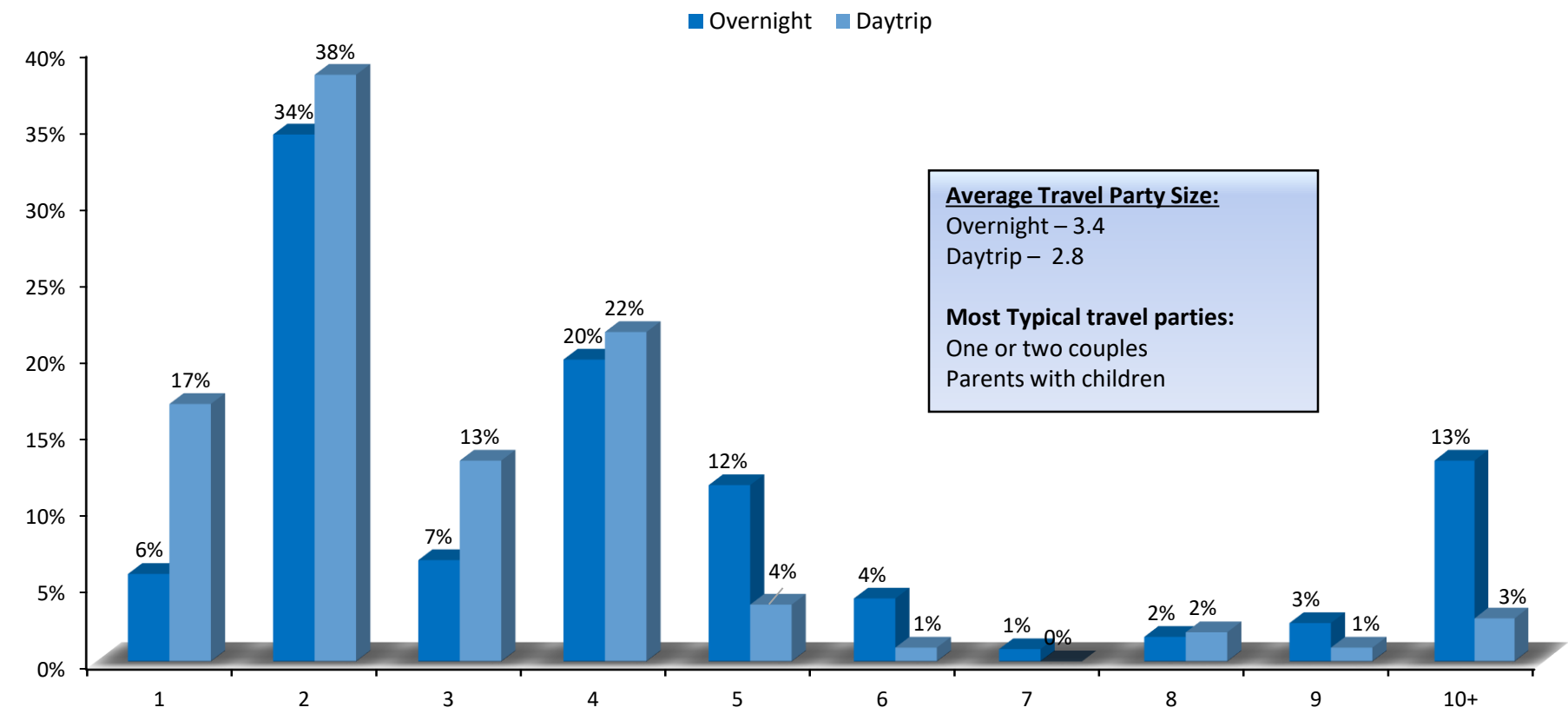
Travel Party Size

What was the total number of people in your travel party?

Overnight n=106; Daytrip n=105

Observations:

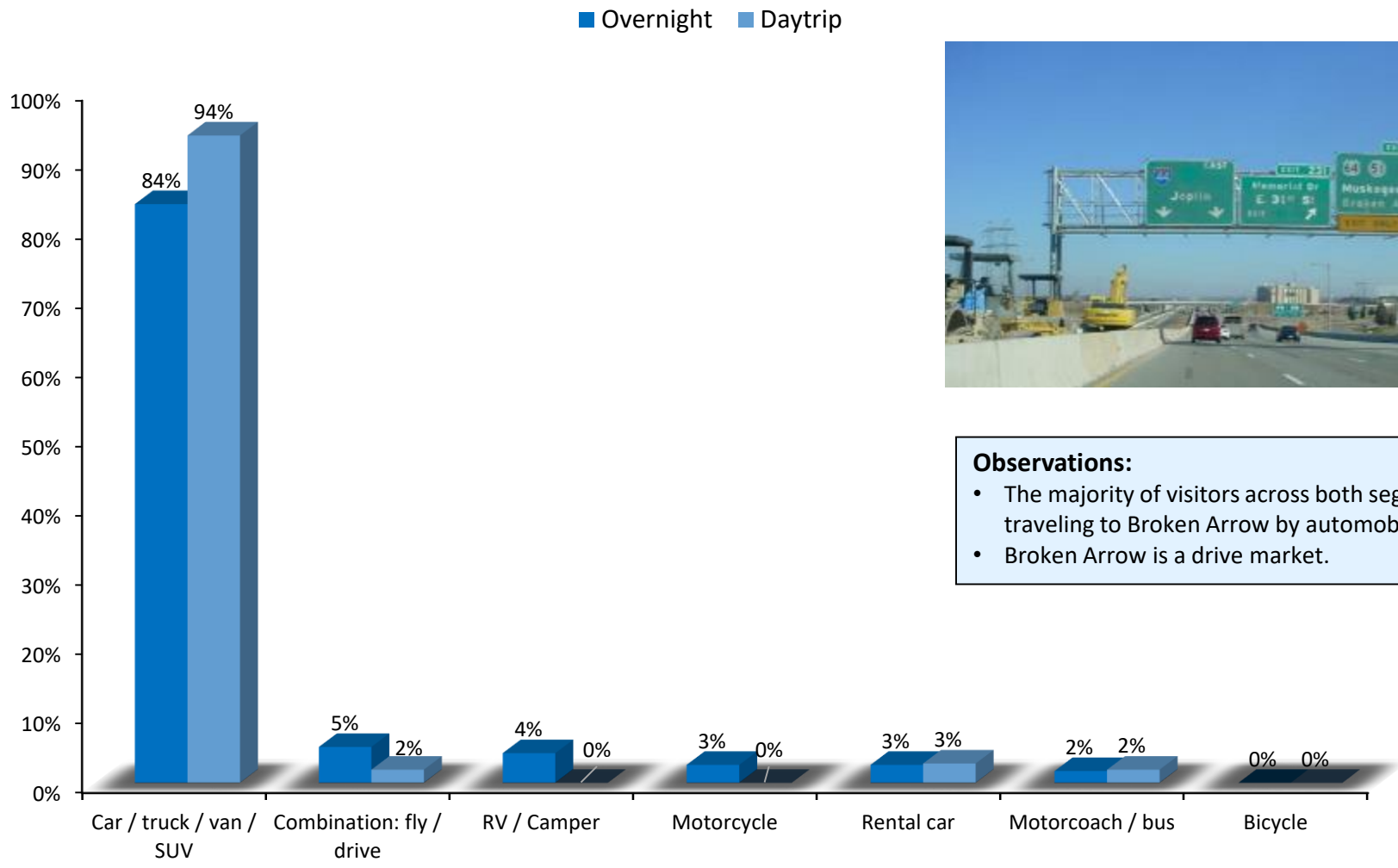
- The average travel party size for overnight visitors = 3.4 with the most typical response being a party size of 2.
- The average travel party size for daytrip visitors = 2.8 with the most typical response being a party size of 2.



Primary Mode of Transportation

What PRIMARY mode of transportation did you use TO TRAVEL TO Broken Arrow, Oklahoma on your most recent visit?

Overnight n=116; Daytrip n=107



Observations:

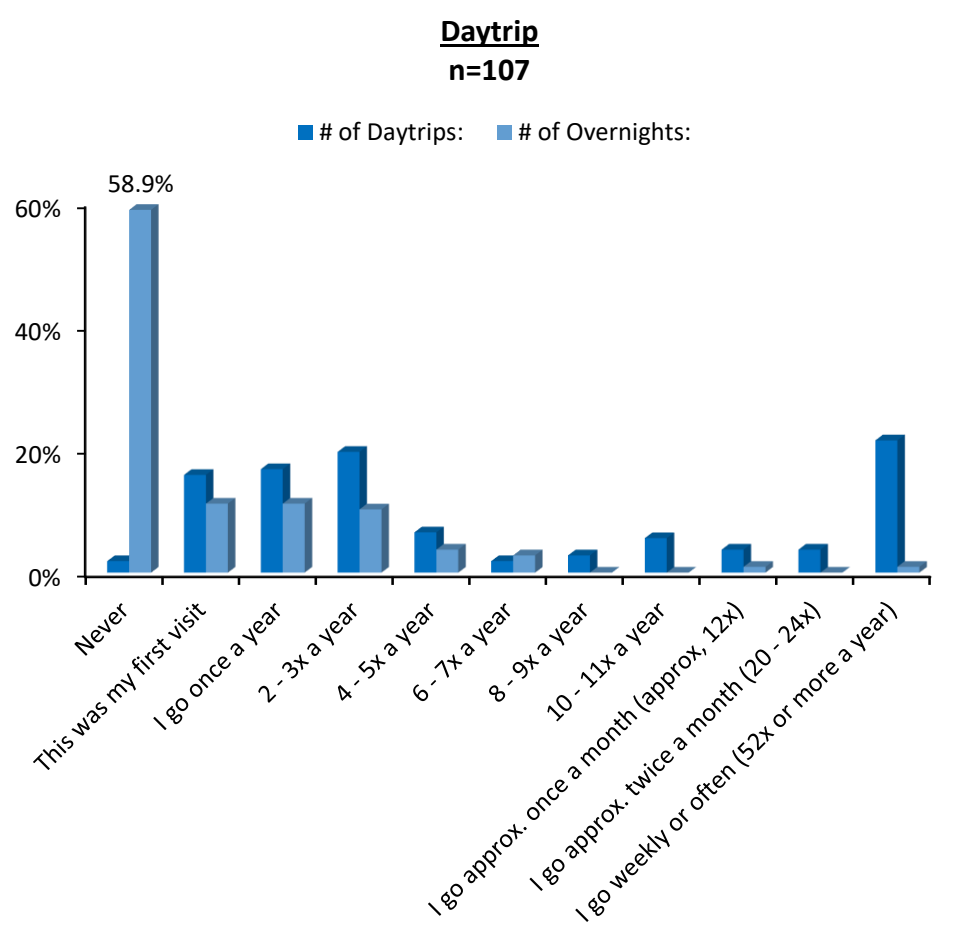
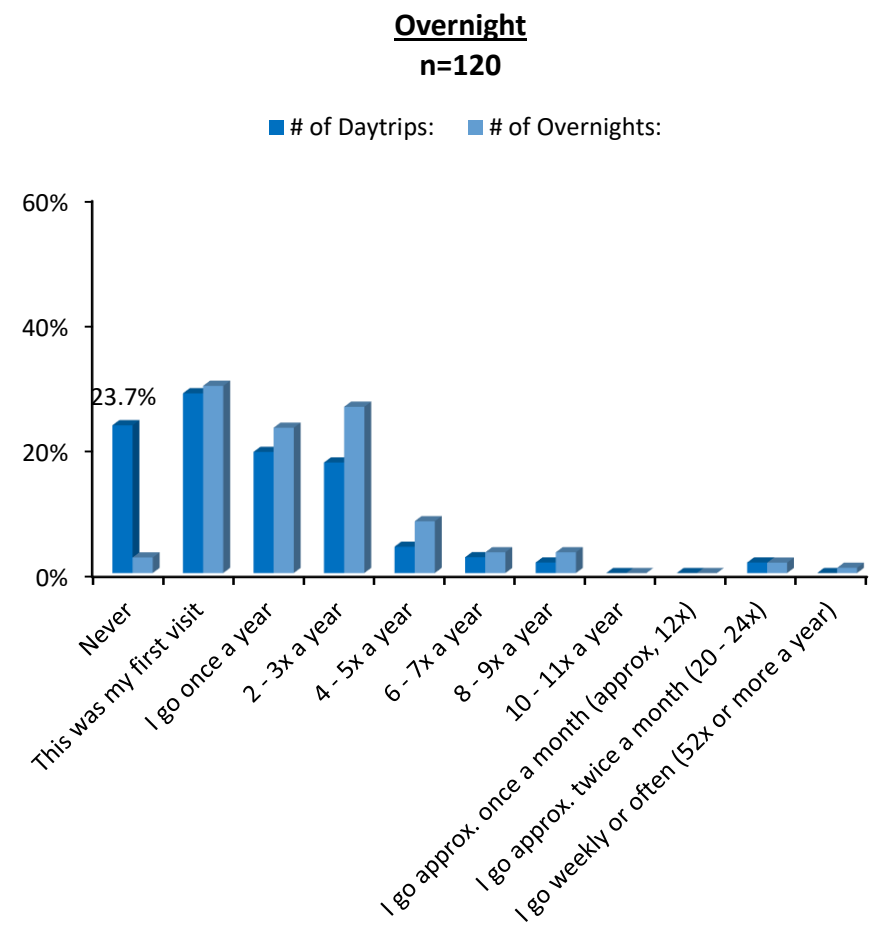
- The majority of visitors across both segments reported traveling to Broken Arrow by automobile.
- Broken Arrow is a drive market.

Travel Behavior Characteristics

Annually, how many times do you typically visit Broken Arrow, Oklahoma?

Observations:

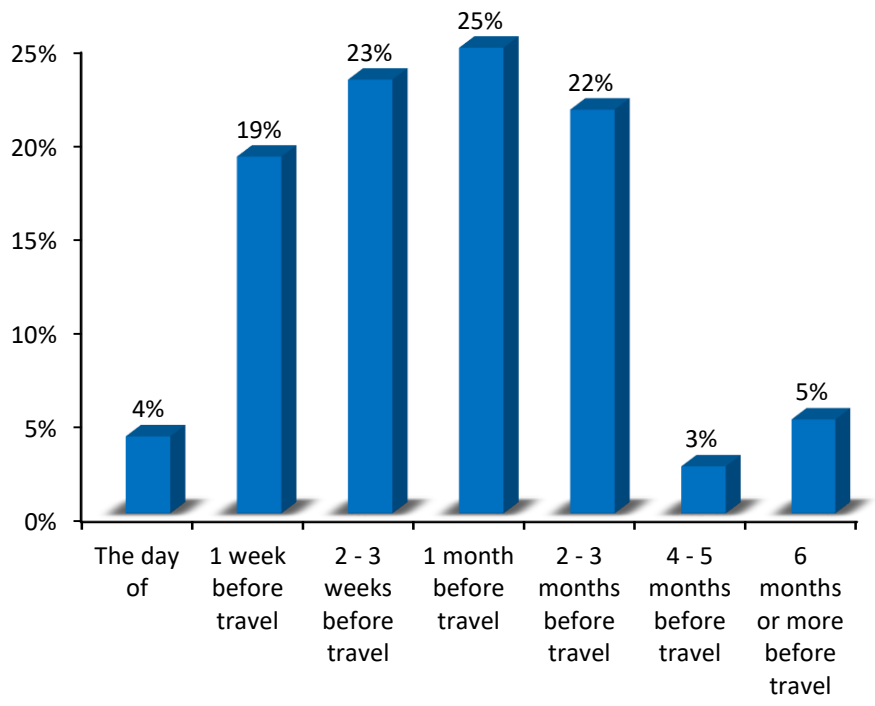
- Slightly less than ¼ (23.7%) of overnight visitors to B.A. have never come for a daytrip while 59% of daytrip visitors indicate they have never taken an overnight trip to B.A. indicating an opportunity to promote activities that encourage overnight stays.
- The majority of repeat leisure travelers visit Broken Arrow between 1 to 3 times annually.



Leisure Overnight - Travel Planning Characteristics
How far in advance did you book your accommodations for your most recent trip to Broken Arrow, Oklahoma? n=121

Observations:

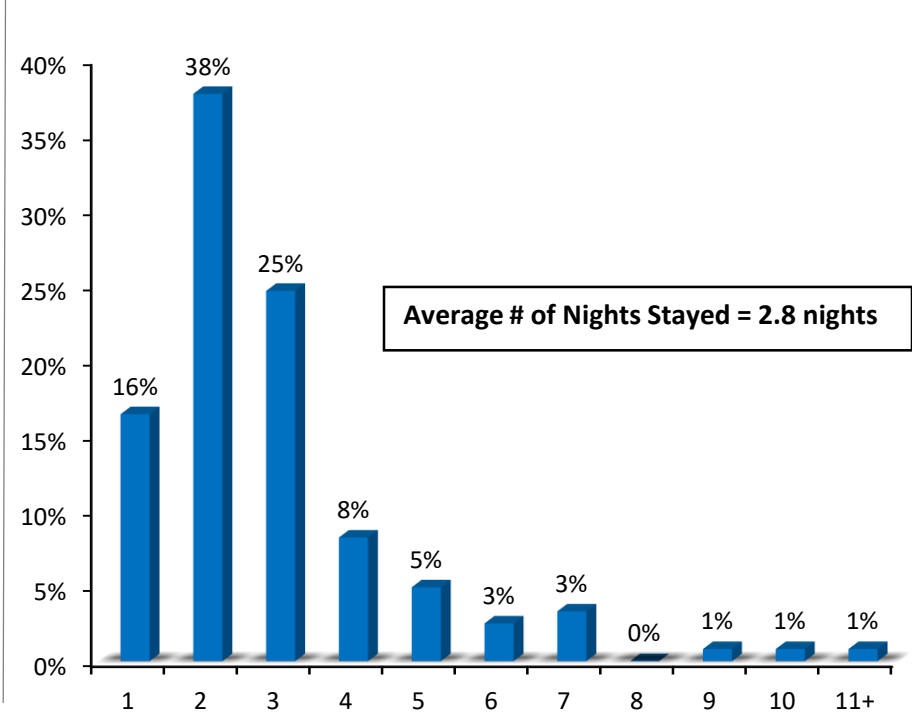
- Nearly three quarters of leisure overnight respondents (71%) indicate they are booking their accommodations within a month of travel, which is a typical trend in many markets across the county.
- Visit Broken Arrow needs to respond swiftly to visitor information inquiries since potential visitors are highly likely to book quickly.



How many nights did you stay in Broken Arrow, Oklahoma on your most recent visit? n=122

Observations:

- Travelers to Broken Arrow are typically staying 1-3 nights.
- Average length of stay for leisure overnight visitors suggests there is an opportunity to drive a third night with marketing promotions and industry partnerships.

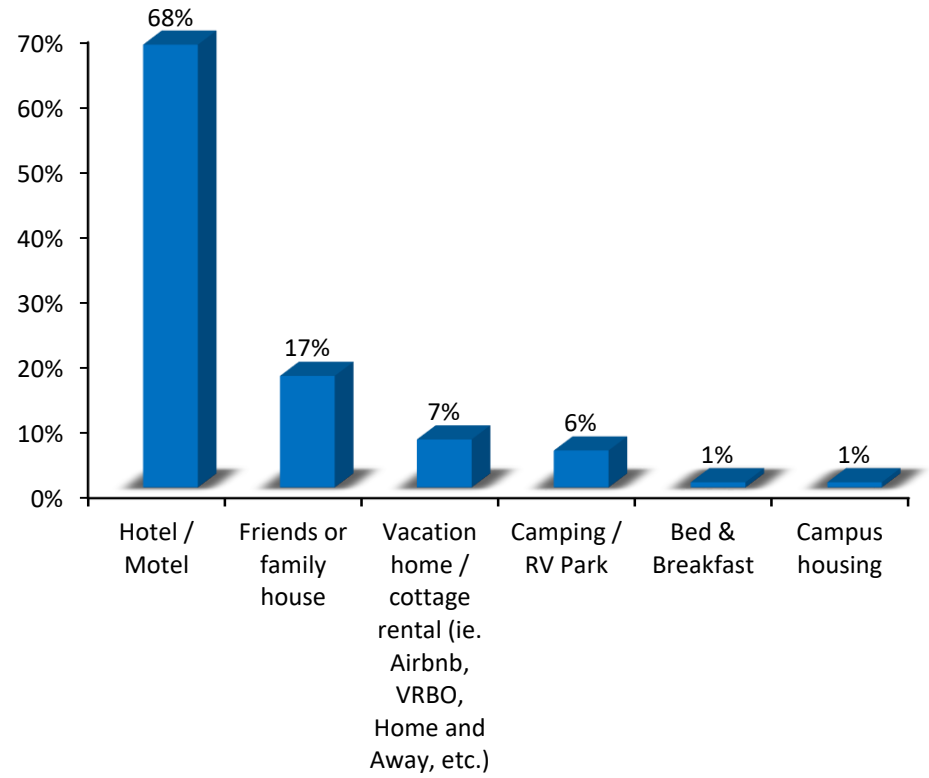


Leisure Overnight - Travel Planning Characteristics

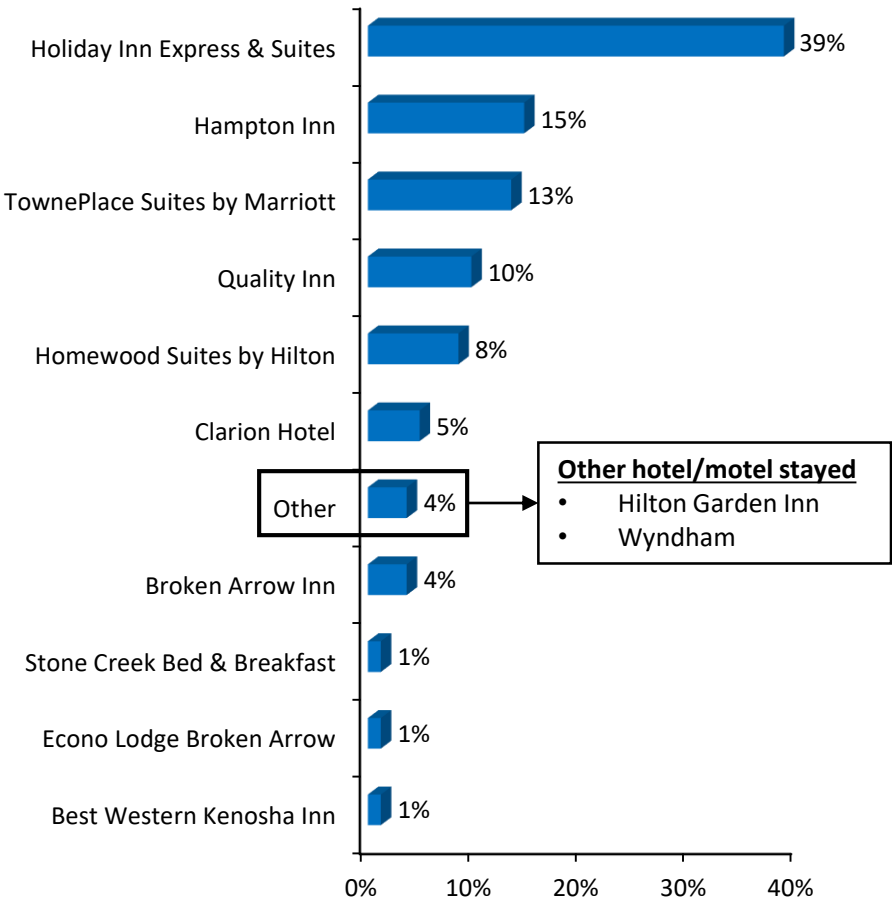
Where did you stay during your last visit to Broken Arrow, Oklahoma?
n=122

Observations:

- As expected, the majority of overnight visitors stay in hotels/motels.
- 17% of leisure travelers indicate they stay with family or friends. It is typical for as much as 1/3 of overnight visitors to a community to stay in the homes of friends and family thus, indicating a healthy number of visitors are staying in Broken Arrow hotels/motels driving economic impact.



Please identify the hotel/motel where you stayed on the LAST visit to Broken Arrow, Oklahoma. n=83



Visitor Activities While in Broken Arrow

Check all ACTIVITIES you or a member of your travel party did while visiting Broken Arrow, Oklahoma. n=120

Top 5 Activities by OVERNIGHT Visitors

- 1. Shopping - 46.7%
- 2. Driving / sightseeing - 40.8%
- 3. Walking downtown - 30.8%
- 4. Antique Shopping - 30.0%
- 5. Visited a park - 30.0%

Other activities participated in by overnight visitors

Activities	%	Activities	%
Sleep late / take a nap	24.2%	Bird watching	10.0%
Fine or local culinary dining	21.7%	Biking / cycling	7.5%
Team sports event / tournament	21.7%	Golf	7.5%
Hiking	18.3%	Art venues / galleries / studios	6.7%
Visit other friends & relatives	17.5%	Business	6.7%
Historic site / museum	16.7%	Concert / live performance	4.2%
Fishing	14.2%	Meeting / conference / training	4.2%
Phototouring / scenic drives	14.2%	University related	3.3%
Visitor Center	14.2%	Did NOT participate in any activities	2.5%
Family reunion / social reunion	13.3%	Motorcycle riding	2.5%
Festival / event	13.3%	Wedding	2.5%
Camping	11.7%	Live theatre	1.7%
Live music / nightlife	10.8%	Other	1.7%

Observations:

- Leisure overnight visitors come to Broken Arrow to immerse themselves in the local experience by enjoying shopping, driving/sightseeing, walking downtown and visiting parks which should be at the core of future marketing messages.
- It is important to mention that while shopping is among the most popular activities by visitors, it does not necessarily translate to high spending on shopping. Many people shop for something to do, without making a purchase.



Visitor Activities While in Broken Arrow

Check all ACTIVITIES you or a member of your travel party did while visiting Broken Arrow, Oklahoma. n=106

Top 5 Activities by DAYTRIP Visitors

1. Shopping - 38.7%
2. Fine or local culinary dining - 32.1%
3. Antique Shopping - 26.4%
4. Walking downtown - 18.9%
5. Driving / sightseeing - 17.0%

Other activities participated in by daytrip visitors

Activities	%	Activities	%
Visited a park	16.0%	Live music / nightlife	5.7%
Team sports event / tournament	13.2%	Camping	4.7%
Business	11.3%	Golf	4.7%
Family reunion / social reunion	10.4%	Bird watching	3.8%
Festival / event	10.4%	Visitor Center	3.8%
Other	9.4%	Biking / cycling	1.9%
Historic site / museum	8.5%	Fishing	1.9%
Visit other friends & relatives	8.5%	Hiking	1.9%
Art venues / galleries / studios	6.6%	Live theatre	1.9%
Meeting / conference / training	6.6%	Phototouring / scenic drives	1.9%
Did NOT participate in any activities	5.7%	Sleep late / take a nap	0.9%
Concert / live performance	5.7%	Wedding	0.9%

Observations:

- Similar to overnight visitors, leisure daytrip visitors come to Broken Arrow to immerse themselves in the local experience by shopping, enjoying the fine or local culinary dining, walking downtown and driving/sightseeing.



Attractions Visited While in Broken Arrow

Following is a list of specific ATTRACTIONS in Broken Arrow, Oklahoma. Please check ALL that you visited while in Broken Arrow, Oklahoma.

Observations:

- Bass Pro Shops was reported as the top attraction visited by both overnight and daytrip travelers.
- Any response above 10% of survey respondents is good and shows broad interest among visitors.

	Leisure Overnight n=120	Leisure Daytrip n=106
Did NOT visit attractions	39.5%	44.3%
Bass Pro Shops	36.1%	25.5%
The Museum Broken Arrow	19.3%	12.3%
Rose District	18.5%	27.4%
Military History Center	10.9%	10.4%
Warren Theatre	10.9%	18.9%
Performing Arts Center	5.0%	5.7%
Persimmon Hollow Center	5.0%	4.7%
Pinot's Palette	5.0%	4.7%
Nienhuis Skate Park	5.0%	7.5%
Xtreme Racing and Entertainment	3.4%	1.9%
Aces Alley	2.5%	2.8%
Community Playhouse	2.5%	7.5%

*Top 3 attractions from each segment are highlighted in blue and bolded

Attractions Visited While in Tulsa

Did you visit any of these TULSA attractions while staying in Broken Arrow, OK?

Observations:

- Over 60% of respondents in both segments (leisure overnight 60.7%, leisure daytrip 63.4%) did not visit Tulsa attractions.
- Respondents that did visit Tulsa attractions report Oklahoma Aquarium and the Tulsa Zoo as the top 2 attractions visited by both leisure overnight and leisure dayrip visitors.

	Leisure Overnight n=117	Leisure Daytrip n=101
Did NOT visit TULSA attractions	60.7%	63.4%
Oklahoma Aquarium	19.7%	13.9%
Tulsa Zoo	17.1%	19.8%
BOK Center - music venue	6.8%	11.9%
Philbrook Museum	6.8%	10.9%
Gilcrease Museum	5.1%	6.9%
ONEOK Field	3.4%	7.9%
Expo Square	3.4%	6.9%
Other	2.6%	2.0%

*Top 3 attractions from each segment are highlighted in blue and bolded



Festivals/Events Visited While in Broken Arrow

Following is a list of major EVENTS in Broken Arrow, Oklahoma. Please check ALL that you visited while in Broken Arrow, Oklahoma.

Observations:

- 74.6% of leisure overnight and 58.7% of leisure daytrip visitors did not attend events while visiting Broken Arrow.
- The event reported as most attended by both overnight and daytrip leisure visitors is the Rhema Holiday Lights.

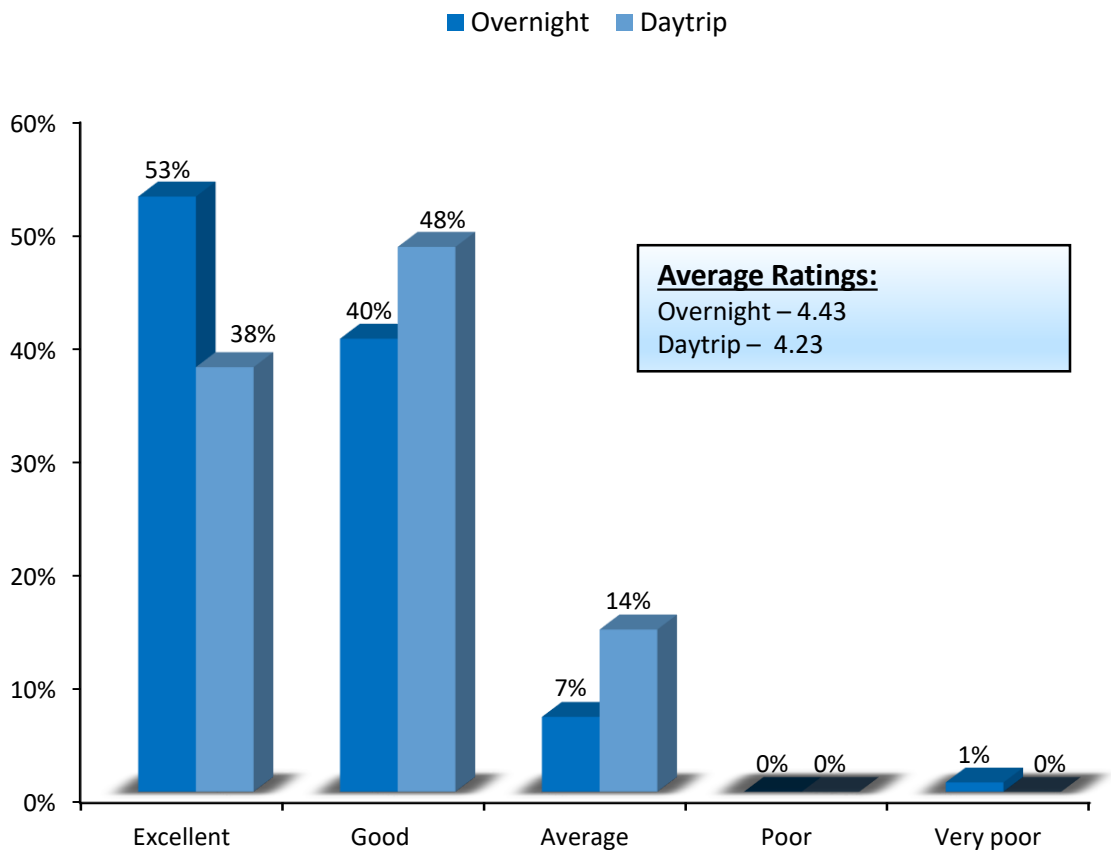
	Leisure Overnight n=118	Leisure Daytrip n=104
Did NOT attend events	74.6%	58.7%
Rhema Holiday Lights	11.0%	19.2%
Taste of Summer	6.8%	11.5%
Tuesday's in the Park	5.9%	5.8%
Red, White and Brew	4.2%	4.8%
Rooster Days	4.2%	22.1%
Drums of Summer	3.4%	1.0%
Ruts n Guts	3.4%	4.8%
ShamRock The Rose District	3.4%	6.7%
Other	3.4%	0.0%
Rockets over Rhema	0.8%	8.7%
Chalk It Up	0.0%	5.8%



Visitor Satisfaction

Overall, how would you rate your experience visiting Broken Arrow, Oklahoma? Use the 5-point satisfaction scale provided below.

Overnight n=120; Daytrip n=104



Observations:

- Overall trip satisfaction for visitors to Broken Arrow is high; Overnight (4.43) and Daytrip (4.23) on a 5.0 scale.
- High satisfaction ratings provide clear indication that Broken Arrow can be promoted as a desirable destination.

Considering this visit to Broken Arrow, please rate each of the following amenities using the satisfaction scale provided below. If you did not participate in any of the activities please check "N/A".

Overnight n=114	Excellent	Good	Average	Poor	Very poor	N/A	Ratings Average
Quality of outdoor experiences	36.0%	39.5%	11.4%	2.6%	0.0%	10.5%	4.22
Dining choices	34.2%	42.1%	16.7%	2.6%	0.0%	4.4%	4.13
Appeal of shopping & merchandise	25.4%	43.9%	16.7%	0.0%	0.0%	14.0%	4.10
Level of service / employee training	26.3%	41.2%	14.0%	3.5%	0.0%	14.9%	4.06
Local events / festivals	21.9%	28.1%	14.9%	1.8%	0.0%	33.3%	4.05
Lodging value you received for the price paid	25.4%	44.7%	17.5%	0.9%	0.9%	10.5%	4.04
Cultural activities	21.9%	30.7%	17.5%	0.0%	0.9%	28.9%	4.02
Signage and wayfinding	26.3%	44.7%	18.4%	4.4%	0.0%	6.1%	3.99
Variety of children's activities	15.3%	25.2%	13.5%	0.9%	0.9%	44.1%	3.95
Evening activities / entertainment / nightlife	22.8%	30.7%	21.1%	4.4%	0.9%	20.2%	3.88

Observations:

- Overnight visitors indicate a high level of satisfaction (4.0+) with quality of outdoor experiences, dining choices, appeal of shopping & merchandise, level of service / employee training, local events / festivals, lodging value and cultural activities.
- Daytrip visitors indicate high satisfaction (4.0+) with appeal of shopping & merchandise, lodging value, and quality of outdoor experiences.

Daytrip n=105	Excellent	Good	Average	Poor	Very poor	N/A	Ratings Average
Appeal of shopping & merchandise	30.5%	34.3%	11.4%	1.9%	0.0%	21.9%	4.20
Quality of outdoor experiences	16.3%	34.6%	11.5%	1.0%	1.0%	35.6%	4.00
Dining choices	27.6%	37.1%	24.8%	2.9%	0.0%	7.6%	3.97
Cultural activities	15.4%	30.8%	14.4%	1.9%	0.0%	37.5%	3.95
Level of service / employee training	21.2%	29.8%	18.3%	3.8%	0.0%	26.9%	3.93
Local events / festivals	10.6%	27.9%	12.5%	2.9%	0.0%	46.2%	3.86
Variety of children's activities	11.8%	21.6%	10.8%	4.9%	0.0%	51.0%	3.82
Evening activities / entertainment / nightlife	14.4%	26.9%	13.5%	6.7%	0.0%	38.5%	3.80
Signage and wayfinding	23.1%	32.7%	23.1%	5.8%	1.9%	13.5%	3.80



Travel PARTY Spending (Total Trip)

Spending Category	Overnight n=106	Daytrip n=105
Average total # in Travel Party	3.4	2.8
Average Length of Stay	2.8 nights	0 nights
Lodging (% of reporting)	\$281.14 (75.6%)	\$0.00 (0.0%)
Shopping (% of reporting)	\$163.50 (55.3%)	\$123.23 (49.1%)
Dining / Food (% of reporting)	\$187.20 (89.4%)	\$72.83 (80.6%)
Events & Festivals (% of reporting)	\$156.84 (15.4%)	\$83.39 (16.7%)
Attractions (% of reporting)	\$132.03 (54.5%)	\$137.77 (28.7%)
Local Transportation (% of reporting)	\$93.61 (37.4%)	\$62.00 (28.7%)
Team Sports (% of reporting)	\$153.24 (13.8%)	\$104.07 (13.9%)
Average Total Spending Per Travel Party (% of reporting)	\$851.07* (92.7%)	\$254.09* (84.3%)

Overall Spending per Travel Party:

- Overnight visitor = \$851.07
\$303.95 per day
- Daytrip visitor = \$254.09

Observations:

- Broken Arrow makes more money per party on overnight visitors compared to daytrip visitors. Therefore, the prime focus of marketing efforts for Visit Broken Arrow should be their overnight segment.
- Promotion of the destination to overnight visitors will result in a healthy number of daytrippers as a natural by-product.

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Overnight



What words would you use to describe Broken Arrow, OK to others?

Overnight:

- | | | | |
|------------------------------------|------------------------|---------------------------------|--|
| • A bit rural in the eastern part. | • Enjoyable (3) | • History | • Progressive |
| • A lot to offer | • Enlightening | • Home | • Quaint (4) |
| • Accessible | • Entertaining (3) | • Homey (2) | • Quality family time |
| • Accommodating | • Exciting (2) | • Honest | • Quiet (5) |
| • Activity | • Family | • Hospitable | • Reasonable |
| • Adventure (2) | • Family friendly | • Hot and Humid | • Recharging |
| • Affordable (2) | • Family oriented | • Interesting (4) | • Recreational |
| • Amazing | • Flat | • Laid back | • Regular |
| • Attractive | • Fresh | • Low Key | • Relaxing (10) |
| • Awesome (2) | • Friendly (17) | • Mid-America | • Romantic |
| • Beautiful (12) | • Friendly people | • Military | • Safe (3) |
| • Budget | • Fun (19) | • Music | • Scenic (2) |
| • Busy | • Fun Town | • Natural | • Shopping (2) |
| • Calm | • Good (6) | • Naturistic | • Simple (2) |
| • Charming | • Good Dining | • Nice (8) | • Slow |
| • Cheap | • Good for families | • Nice and quiet little suburb. | • Small (4) |
| • Chilly | • Good local food | • Nice city | • Small town |
| • Classic | • Good place | • Nice community | • Small town feel |
| • Clean (13) | • Good place to spend | • Nice Downtown | • Small town working on growing bigger |
| • Close to home | • Gorgeous | • Nice Landscaping | • Spectacular |
| • Comfortable (2) | • Great (3) | • Nice suburb | • Trendy |
| • Community | • Great city | • Not pricey | • Trustworthy |
| • Convenient (2) | • Great outdoors | • Open | • Underrated |
| • Convenient to Tulsa | • Great place to visit | • Outdoor | • Unique (3) |
| • Cool | • Great times | • Outdoorsy | • We got nice pics |
| • Cool climate | • Green | • Peaceful (4) | • Welcoming |
| • Different (3) | • Helpful | • Perfect | • Western (2) |
| • Easily accessible by interstate | • Historic (2) | • Pleasant | • With kids good |
| • Educational | • Historical | • Polite | • Wonderful |
| • Elegant | • Historical interests | • Pretty (6) | |

What words would you use to describe Broken Arrow, OK to others?

Daytrip:

POSITIVE

• Affordable	• Diverse	• Inviting (2)	• Small (2)
• Amazing (2)	• Dull	• Large	• Small town
• Appealing (2)	• Easy access	• Lively	• Small town feel (2)
• Artsy	• Easy to get around	• Local	• Sneaky big
• Attractive (3)	• Effort	• Long stop lights	• Southern hospitality
• Average place	• Energetic	• Lots of places to shop and eat	• Up and coming
• Awesome (3)	• Enormous constant building and expansion	• Love downtown area	• Useful
• Beautiful (2)	• Entertaining (2)	• Modern	• Variety (2)
• Bedroom community	• Excellent (2)	• Neat	• Very safe
• Best	• Exciting (2)	• Nice (11)	• Very well (2)
• Big	• Familiar	• Nice area	• Vibrant
• Business signs not tall enough	• Family oriented (3)	• Nice environment	• Water feature should attract even more families
• Busy	• Fine (2)	• Nice people	• Welcoming (2)
• Busy Rose District	• Football town	• Nice place	• Well
• Calm	• Friendly (14)	• Nice place to visit	• Well educated teachers
• Charming	• Friendly atmosphere	• Open spaces	• Wonderful
• Clean (11)	• Friendly people	• Peaceful (2)	• Yawn
• Clean and pleasant	• Fun (10)	• Pleasant	• Young
• Clean and well taken care of	• Good (3)	• Pretty	
• Clean town not too big	• Good education	• Quaint (5)	
• Close	• Good location	• Quiet (3)	
• Close to home	• Good place to raise a family	• Relaxing (4)	
• Community	• Great (2)	• Revitalized city	
• Convenient	• Green and lush	• Rose district	
• Cool	• Growing (3)	• Rose district is great	
• Cool (2)	• Happy	• Rustic	
• Countryish	• Helpful	• Safe (2)	
• Cozy (3)	• Historic	• Safe	
• Crowded	• Improving	• Seems to be improving	
• Dated	• Interesting (3)	• Simple	

What words would you use to describe Broken Arrow, OK to others?

Daytrip:

NEUTRAL/NEGATIVE

- Boring (2)
- Confuse with Broken Bow
- Confusing 2 names for streets
- Folksy town
- Idk
- It's a start
- Narrow busy roads
- Near Tulsa
- None
- Not especially tourist friendly (more for locals)
- Not for me
- Not too diverse
- Out of the way
- Stale
- Suburb (4)
- Suburb of Tulsa
- Suburban (2)
- Tulsa
- Typical Oklahoma town

Please tell us how we can improve the visitor experience.

Overnight

Top 3

1. **Nothing, love it the way it is! (40)**
2. **More activities/things to do (26)**
3. **Better advertising/communication/signage (13)**

Nothing, love it the way it is (40)

- Already love BA just as it is
- Can't think of anything....it was what I expected.
- Everything great for all the years I've been there
- Everything was great
- Everything was great. Love the hotel. Like the quaintness of Broken Arrow.
- Fine
- Good as Is
- I can't seem to think of anything
- I have had 4 nice trips within 60 days. Very nice city.
- It's all great
- Keep the prices down
- N/a (9)
- No advice
- None (4)
- Nothing (8)
- Nothing :)
- Nothing as such
- Nothing I can think of!!
- Perfect
- Stay as is
- The entire area of people have been very welcoming and gracious! We enjoyed our stay in Broken Arrow very much! No improvement necessary.
- Was great for me

More to do (26)

- Accommodate some parks
- Better lists of activities
- Better nightlife
- Get more night life
- Include more fun attractions
- Kids events
- More activities
- More attractions (2)
- More children activities
- More downtown activity
- More entertainment
- More events
- More festivals
- More guides
- More interactive outdoor experiences
- More museums
- More parks
- More pet friendly attractions
- More places
- More shopping
- More stores
- More stuff
- More to do
- No night life for a Saturday night.
- Youth activities indoor

Please tell us how we can improve the visitor experience. (CONTINUED)

Overnight

Better advertising/communication/signage (13)

- Advertise
- Better brochures online
- Better signage
- Better signage for events
- Billboards
- Email about festivals
- Maps to attractions
- More advertising festivals
- Notifications of events prior to days before
- One brochure that highlight most of what to do, where to eat for out of towners
- Promote senior visitors/relocation through AARP and others
- Promote the Rose District in travel magazine/AAA
- Street map

More variety of food (11)

- A variety of food
- Food
- Have more dining options
- Maybe add a high-end Italian restaurant
- More dining opportunities
- More eating
- More fine dining
- More places to eat
- More restaurants (2)
- More restaurants, not chains

Discounts/Coupons (8)

- Cheaper hotels
- Low price
- Lower fees for rental cabins
- Lower hotel price
- Maybe discounts for out of town people
- More coupons for activities
- More reasonable priced restaurant
- Promote Veteran/military discounts at Ft. Sill and with American Legion/VFW

Miscellaneous (11)

- Be friendly to LBG
- Better cell service
- Better places to stay
- Don't let it rain for 4 days straight :)
- Fences and gates around parks
- Interconnect with other national small towns for places to visit
- More Bed and Breakfasts
- More lodging choices
- Security
- Shuttle service included in hotel price
- Take notes from OKC and Denver

Please tell us how we can improve the visitor experience.

Daytrip

Top 3

1. **Nothing/Don't know**
2. **Better advertising/Communication/Signage**
3. **More activities/Things to do**

Don't know/Nothing (25)

- Can't think of a thing
- Can't think of any
- Don't know
- I can't think of any.
- IDK (3)
- Just keep working
- Keep downtown looking good
- Keep going
- Na (5)
- Needs something more
- Nice
- No improvements
- None (4)
- Not applicable
- Nothing
- Nothing in mind

Advertisements/communication/signage (17)

- Advertise more on the news or social media
- Better advertising of activities
- Better marketing
- Better signage (2)
- Better signage to downtown and attractions
- Better signage/less confusing street signs
- Get on Snapchat-teenagers love it

- Info stands for business to promote upcoming events besides using a computer or phone for it.
- More event information on social media
- More mobile options
- Place a sign near Lynn Lane that lists all the "Shops at Broken Arrow" (on Hillside).
- Place larger, easily visible addresses on homes and business THROUGHOUT Broken Arrow
- Provide local insight via social media
- Update Zomato app with restaurant ratings
- Updated FB page
- Updated info on Trip Advisor

More to do (17)

- Better activities
- Better nightlife
- Better shopping
- More activities
- More amenities
- More child friendly venues
- More development of attractions by Bass Pro Shops
- More entertainment
- More events for adults (concerts, etc.)
- More festivals
- More kids activities/events
- More off Rose District parking with a jitney type transportation to and from.
- More options
- More shopping center
- More things to do with kids
- More walking parks
- Shopping

Please tell us how we can improve the visitor experience. (CONTINUED)

Daytrip

Traffic/Parking/Roads (11)

- Better roadside lighting(highway lights)
- Better transportation
- Fix roads
- Improve traffic routes
- Is the street County Line, 9th, or 23rd?
- It's confusing when streets have 2-3 names
- More accessible parking in Rose District
- More parking downtown
- Parking is always an issue when I go downtown
- Reduce speeds on 51st, Lynn Lane, and County Line
- Synchronize the lights on Lynn Lane and Elm. It takes forever to get to freeway entrance

Restaurants (10)

- Additional appealing restaurants
- I'd love to see more restaurant options
- Later dining hours
- More choice in family dining
- More dining options
- More diversified restaurants
- More restaurants
- More restaurants downtown
- Restaurants
- Upscale dining

Lower prices (3)

- Cheaper food
- Cheaper gas
- Cheaper prices

Miscellaneous (27)

- Best (2)
- Better city planning to tie various areas of the city together
- Better hotels
- Clean up nature along roadsides
- Don't know don't travel on there on purpose just in Tulsa area before a flight
- Easier to find festivals like church craft shows
- Excellent
- Festivals in the park are not nearly as desirable as when they are on Main Street (2)
- Fun
- Good
- Have places open later
- It is a halfway point to meet up with my in-laws, which is why we do several trip a year
- It was fun to be in broken arrow catching up with friends
- Keep up the good work
- Let families know what's going on
- More color
- More inns
- Move it further from Tulsa
- Open Sundays also
- Places
- Places to visit
- Put people with more experience
- Quickly service
- Very well (2)
- Well

Activities and Experiences That Would Appeal to Visitors

What types of activities or experiences would inspire you to visit Broken Arrow, Oklahoma?

Overnight n=118	Extremely	Very	Somewhat	Slightly	Not at all	Ratings Average
Local/unique boutiques in a shopping village	25	31	21	7	11	3.55
Indoor Farmer's Market with a Food Hall	21	36	19	4	13	3.52
Farm-to-table dining restaurant	26	41	26	6	16	3.48
Music concerts in a lakeside setting	23	25	22	11	12	3.39
Local craft beer brewery / pub	19	29	23	4	18	3.29
Live music in a club setting	18	24	22	6	22	3.11
Antique car museum	20	23	30	16	23	3.01
Adult / family arcade - entertainment venue	21	26	25	11	30	2.97
Indoor water park	21	23	25	6	37	2.87
Bike rentals / additional bike trails	16	30	17	18	30	2.86

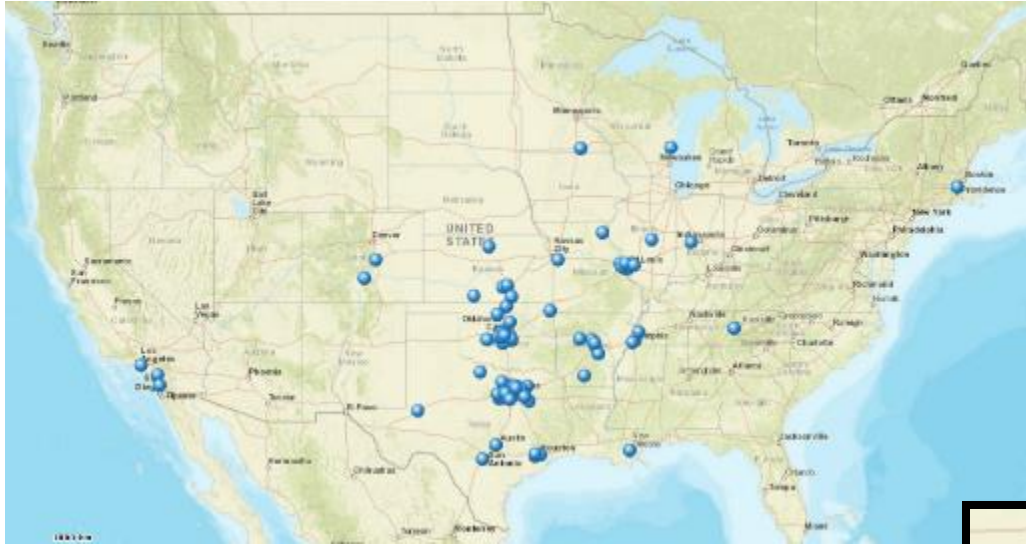
Daytrip n=104	Extremely	Very	Somewhat	Slightly	Not at all	Ratings Average
Farm-to-table dining restaurant	22	25	26	11	13	3.33
Indoor Farmer's Market with a Food Hall	15	21	16	6	11	3.33
Music concerts in a lakeside setting	15	15	17	12	11	3.16
Local/unique boutiques in a shopping village	13	18	18	9	12	3.16
Local craft beer brewery / pub	17	14	12	6	21	3.00
Indoor water park	18	19	20	8	34	2.79
Adult / family arcade - entertainment venue	13	21	23	13	28	2.78
Live music in a club setting	6	20	11	9	23	2.67
Antique car museum	16	9	20	22	32	2.55
Bike rentals / additional bike trails	10	18	22	15	34	2.55

Observations:

Survey respondents were asked to indicate their level of interest in a list of possible new activities/experiences. A list was developed in order to test concepts and ideas in terms of appeal for visitors.

- Highest rated among the listed items for overnight leisure visitors is local unique boutiques in shopping village and indoor farmers market with food hall and farm to table dining restaurant.
- Highest rated among the listed items for daytrip leisure visitors is farm to table dining restaurant, indoor farmers market with food hall and music concerts in a lakeside setting.

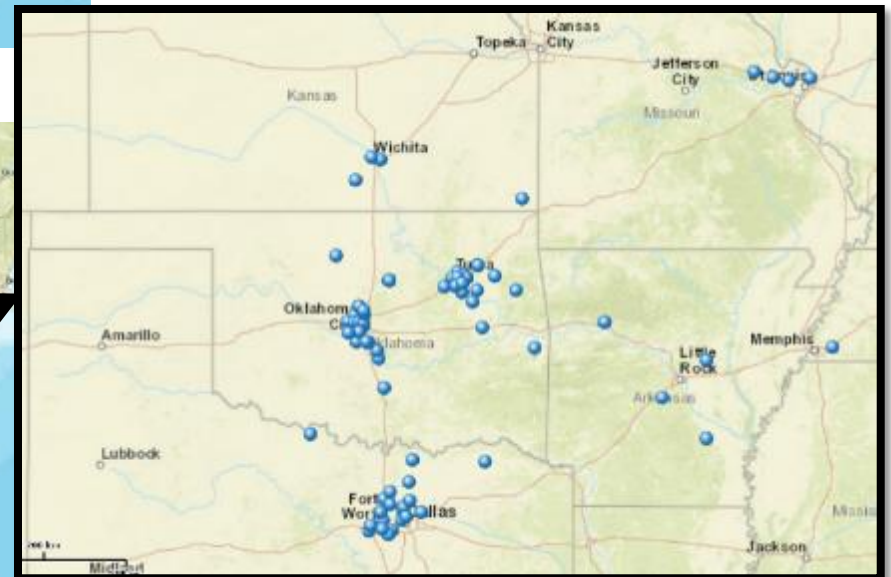
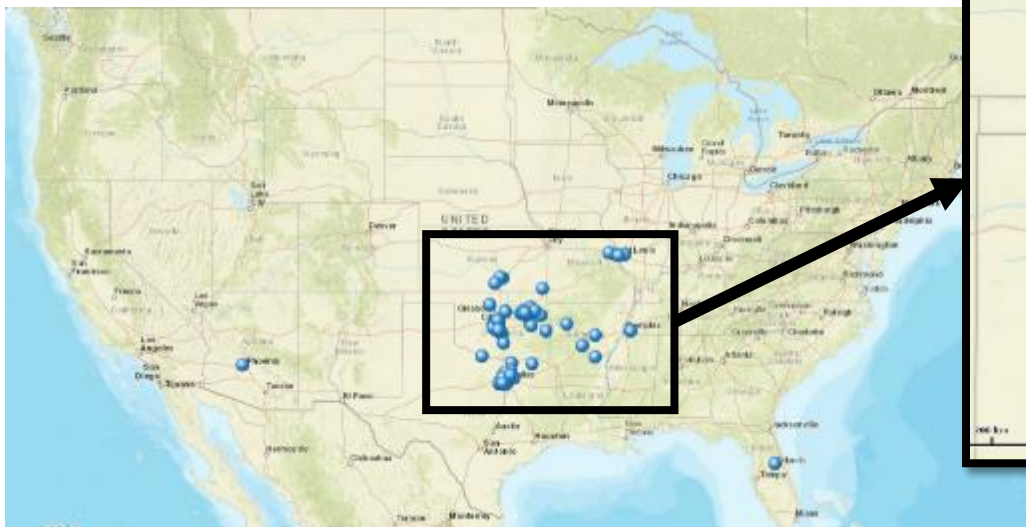
Visitors Point of Origin – OVERNIGHT



Observations:

- The majority of overnight and daytrip leisure visitors come to Broken Arrow from a 3 to 4 hour radius confirming that Broken Arrow is a drive market.
- Daytrip came primarily from residents within a one-hour drive radius or travelers outside of that radius who were staying in Tulsa area hotels.

Visitors Point of Origin – DAYTRIP



Visitors Point of Origin – Overnight

State - City			
TEXAS- 44.3%			
Dallas	9		
Fort Worth	5		
Plano	5		
Arlington	4		
Carrollton	2		
Houston	2		
Kaufman	2		
Lewisville	2		
Richardson	2		
Austin	1		
Burleson	1		
Colleyville	1		
Coppell	1		
Decatur	1		
Eustace	1		
Flower Mound	1		
Forney	1		
Granbury	1		
Greenville	1		
Holliday	1		
Irving	1		
Mansfield	1		
Rockwall	1		
Rowlett	1		
San Antonio	1		
Sugar Land	1		
Terrell	1		
Venus	1		
Weatherford	1		
Willow Park	1		
OKLAHOMA- 25.4%			
Oklahoma City	12		
Edmond	3		
Norman	2		
Edmond	2		
Blackwell	1		
Colorado Springs	1		
Enid	1		
Goldsby	1		
Grove	1		
Newcastle	1		
Shawnee	1		
Tecumseh	1		
Harrah	1		
Binger	1		
Mustang	1		
Stillwater	1		
MISSOURI- 6.6%			
St. Louis	3		
Festus	1		
Lees Summit	1		
Maryland Height	1		
O'fallon	1		
Wildwood	1		
ARKANSAS- 4.9%			
Camden	1		
Greenbrier	1		
Jacksonville	1		
Keo	1		
Russellville	1		
Vilonia	1		
KANSAS- 4.9%			
Wichita	3		
Glen Elder	1		
Wilmore	1		
Winfield	1		
TENNESSEE- 3.3%			
Memphis	2		
Henning	1		
Lenoir City	1		
CALIFORNIA- 2.5%			
Los Angeles	1		
San Marcos	1		
Wildomar	1		
ILLINOIS- 2.5%			
Collinsville	1		
Decatur	1		
Granite	1		
LOUISIANA- 1.6%			
New Orleans	1		
Prairieville	1		
COLORDAO- 0.8%			
Coatesville	1		
INDIANA- 0.0%			
MASSACHUSETTS- 0.8%			
Franklin	1		
MINNESOTA- 0.8%			
Austin	1		
WISCONSIN- 0.0%			
Sheboygan Falls	1		

Visitors Point of Origin – Daytrip

State - City			
OKLAHOMA- 66.0%			
Tulsa	26		
Oklahoma City	8		
Edmond	5		
Jenks	4		
Stillwater	4		
Bixby	2		
Enid	2		
Norman	2		
Verdigris	2		
Bethany	1		
Bethany	1		
Checotah	1		
Chouteau	1		
Coweta	1		
Haskell	1		
Lexington	1		
Mustang	1		
New Castle	1		
Noble	1		
Panama	1		
Sapulpa	1		
Tahlequah	1		
Wynnewood	1		
Yukon	1		
TEXAS- 19.8%			
Dallas	5		
Arlington	2		
Fort Worth	2		
Carrollton	1		
Celina	1		
		Denton	1
		Flower Mound	1
		Grand Prairie	1
		Hurst	1
		Keller	1
		Lantana	1
		Paris	1
		Rowlett	1
		Sherman	1
		Wichita Falls	1
ARKANSAS- 3.8%			
		Benton	1
		Clarksville	1
		Star City	1
		Ward	1
KANSAS- 3.8%			
		Wichita	2
		Columbus	1
		Conway Springs	1
MISSOURI- 3.8%			
		St. Louis	2
		O'Fallon	1
		Wright City	1
ARIZONA- 0.9%			
		El Mirage	1
FLORIDA- 0.9%			
		Altamonte Spring	1
TENNESSEE- 0.9%			
		Memphis	1

Visit Broken Arrow

Resident Survey Respondents



Summary & Observations:

- **315 residents of Broken Arrow** responded to the YSI survey.
- **57% of the resident survey respondents have lived in Broken Arrow between 1-20 years. The most common response between 6-10 years (18%) with 43% having lived there more than 20 years.**
- US Census Bureau data for Broken Arrow reports **2.64 people per household in Broken Arrow and this data reflects the same.**
- **64% of the Broken Arrow residents reported hosting 1-10 visitors annually.** Only 14% of respondents reported hosting no guests.
- **Dining rated highest** as an activity for residents when entertaining houseguests. The US Census Bureau reports 37,246 households in Broken Arrow. If 50% of the households hosted five overnight guests per year it would represent a conservative estimate of 94,115 **annual overnight visitors staying in resident homes.**
- **The warm weather months are typically the most popular** months for visiting friends and relatives followed by Thanksgiving and Christmas.

"I've come to love my adopted town and recommend it to everyone who asks. I implore them to spend their nights here instead of in surrounding towns and to be sure to check out the gorgeous downtown area with its beautiful mix of old and new. The shopkeepers are welcoming and friendly and the cultural spaces like the museums and PAC are excellent venues that add a lot of value to the community. I've really fallen in love with this town and its unique blend of "big city" and "small town" all rolled into one."

Visit Broken Arrow

Resident Survey Respondents

- 55 -

Methodology

A battery of resident questions was prepared as part of the City of Broken Arrow visitor survey by the Young Strategies research team and approved by Visit Broken Arrow. Local attractions deployed the survey invitation to their databases that included residents and visitors.

Those taking the online survey were asked if they were residents of or visitors to Broken Arrow, OK.

Residents answered questions related to hosting visitors in their Broken Arrow homes.

All recipients completing the online survey were offered the opportunity to be entered into a chance to win one of two \$250 VISA gift cards.

A total of 315 residents responded to the YSI visitor survey. N=315



Overall Resident Respondent Demographics

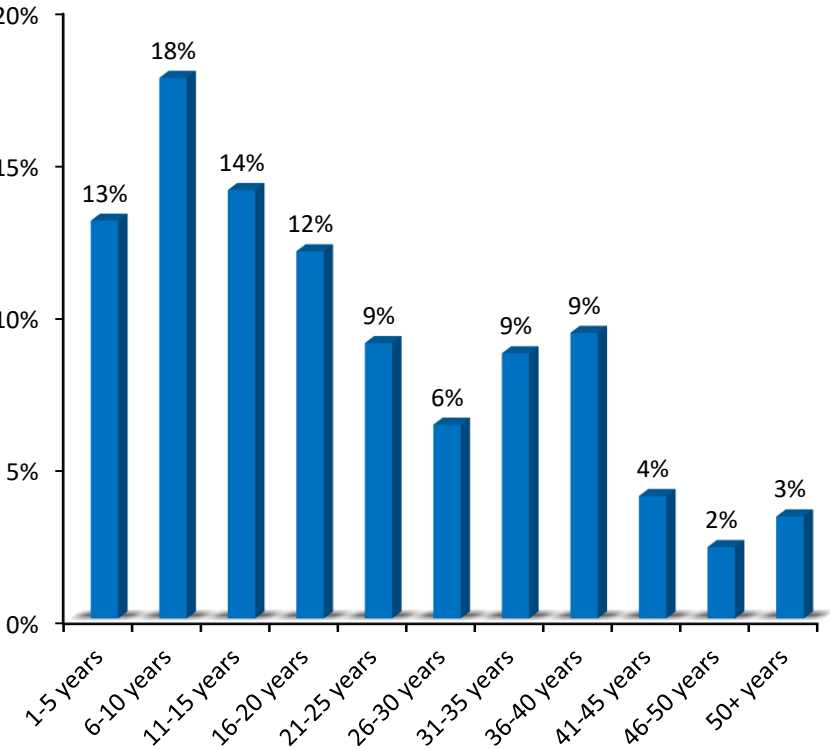
Demographics		Residents N=271
Average Age		52.9 years old
Generational Group		
	24 and under	1.5%
	25-34	9.6%
	35-44	20.7%
	45-54	22.1%
	55-64	24.0%
	65-74	17.0%
	75 or older	5.2%
Gender	Female	61.6%
	Male	38.4%
Occupation		
	Retired –	20.6%
	Professional / Technical –	12.6%
	Management / Executive –	9.1%
	Office / Secretary / Clerk –	8.7%
	Education / Professor / Teacher –	7.9%
Level of Education		
	College	40.5%
	Some College	29.0%
	Graduate School	21.6%
	High School Graduate	6.3%
Ethnicity		
	White/Caucasian	88.8%
	American Indian or Alaskan Native	8.2%
	Hispanic or Latino	2.6%
	Prefer not to answer	2.6%
	Black or African American	2.2%
	Asian or Pacific Islander	1.9%



Resident Respondent Household

Please tell us how many years you have lived in Broken Arrow.

n=299

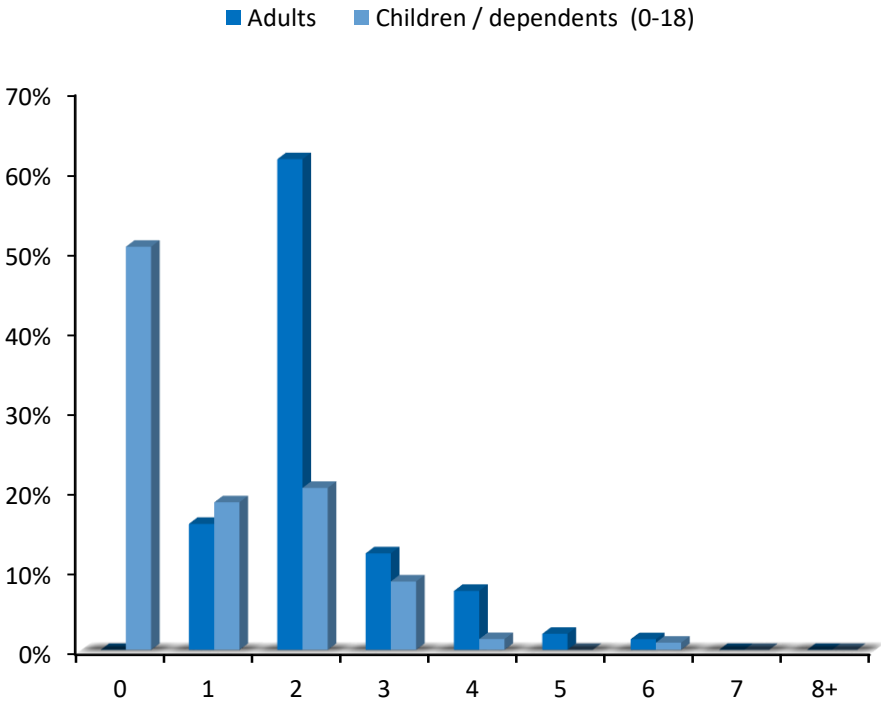


Observations:

- 57% of resident survey respondents have lived in Broken Arrow between 1-20 years, with the most common answer being between 6-10 years.

How many people currently live in your household?

n=299



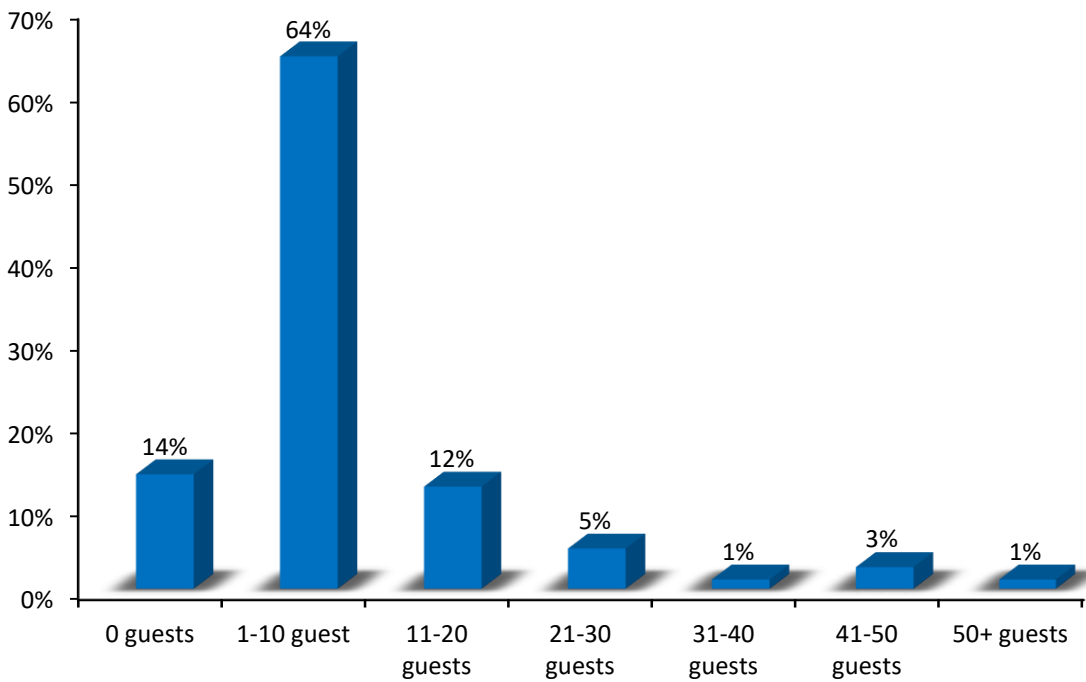
Observations:

- The resident households that responded to the survey represent predominantly adult households.
- US Census Bureau data for Topeka reports 2.64 people per household which directly compares to this data.

Resident Respondent Guest Visitation

Please estimate the TOTAL number of overnight guests you hosted in your home last year?

n=269



Observations:

- Overnight guests staying with Broken Arrow residents represent a third of overall visitation with 76% of the residents reporting 1-20 visitors annually. Only 14% of respondents reported hosting no guests.
- The US Census bureau reports 116,926,305 households in Broken Arrow.

Resident Respondent Satisfaction

When friends, family or business guests visit you, please tell us how often you take them to participate in the following Broken Arrow experiences. Please use the frequency scale provided below. (N/A indicates you don't take visitors there.)

n=275

Observations:

- Dining was rated highest as a popular activity to entertain out-of-town guests visiting local residents. The warm weather months are typically the most popular months for visiting friends and relatives followed by Thanksgiving and Christmas.

	Always	Frequently	Rarely	Never	N/A	Rating Average
Dining	46.4%	42.3%	6.9%	0.7%	3.6%	3.39
Unique shopping	12.5%	41.0%	28.2%	8.8%	9.5%	2.63
Festivals / local events / team sports	11.6%	34.5%	36.0%	9.7%	8.2%	2.52
Evening entertainment / nightlife	11.2%	26.8%	39.8%	15.6%	6.7%	2.36
Cultural activities (concerts, theater, performing arts, etc.)	5.9%	24.4%	44.8%	15.9%	8.9%	2.22
Children's activities	6.3%	25.5%	27.7%	21.8%	18.8%	2.20
National / state / local parks	5.2%	28.3%	37.5%	21.6%	7.4%	2.18
Outdoor activities (hike, bike, etc.)	5.2%	23.4%	38.3%	23.8%	9.3%	2.11
Museums / local attractions	4.4%	19.9%	36.5%	29.5%	9.6%	1.99
Historic tours	2.6%	8.9%	34.6%	44.2%	9.7%	1.67

Resident Respondent Activities

What types of activities or experiences would inspire your guests to visit Broken Arrow, Oklahoma?

n=268

Observations:

- Residents were asked about new and existing activities that would appeal if offered in Broken Arrow. The rank order below helps identify varying rates of appeal of popular activities that can help guide future marketing and development activities.

	Extremely	Very	Somewhat	Slightly	Not at all	Rating Average
Farm-to-table dining restaurant	25.0%	29.5%	31.0%	10.1%	4.5%	3.60
Music concerts in a lakeside setting	28.6%	30.4%	21.4%	10.7%	8.9%	3.59
Indoor Farmer's Market with a Food Hall	21.1%	29.8%	33.3%	10.5%	5.3%	3.51
Local/unique boutiques in a shopping village	21.8%	36.4%	16.4%	10.9%	14.5%	3.40
Local craft beer brewery / pub	19.6%	30.4%	19.6%	10.7%	19.6%	3.20
Adult / family arcade - entertainment venue	17.5%	22.1%	27.4%	16.3%	16.7%	3.07
Indoor water park	20.5%	18.6%	23.6%	14.8%	22.4%	3.00
Bike rentals / additional bike trails	12.9%	20.1%	29.9%	18.6%	18.6%	2.90
Live music in a club setting	8.9%	19.6%	21.4%	25.0%	25.0%	2.63
Antique car museum	7.6%	12.6%	28.2%	27.1%	24.4%	2.52

Observations: • The residents overall comments indicate a positive attitude and perception related to Broken Arrow, OK as a place to visit. • The word cloud below summarizes the comments with exact verbatim comments provided on the following pages.
--



Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others?

Residents:

POSITIVE

- A blessed place to live
- A good place to raise a family
- A happy and giving community.
- A low crime community.
- A strong Christian community with many shared values.
- Abundant
- Access to resources
- Activities on Main Street
- Adequate resources for basic needs
- **Affordable (4)**
- Affordable (comparatively speaking)
- Affordable housing
- All you need
- Always changing for the better
- Always something to do
- Amazing (2)
- American
- Amount of activities/places to go keep increasing
- Atmosphere
- Attractive
- Awesome (2)
- BA City Council not interested in doing what is right
- BA listens to its residents
- Bad past five years for business
- **Beautiful (12)**
- Beautiful countryside out of town
- Bed Room Community
- Bedroom community (2)
- Best city in Oklahoma
- Best kept secret ever
- Big
- Big city perks
- Big city with small town leadership
- Big enough to have everything we need but small enough to have that small country feeling
- Big Small Town
- Big town benefits with small town feel
- Big town with a small town feel
- Big, little city
- Biggest little town in America
- Booming (2)
- Bought town with small town feel
- **Caring (4)**
- Caring and welcoming
- Charming (2)
- Cheap
- City need tough regulations & more Corporate business
- City of 100,000 that feels like a small town
- **Clean (25)**
- Clean and friendly
- Clean, fresh air
- Close knit
- Close to Tulsa with all their attractions and entertainment.
- Close to work
- Colorful
- Comfortable (3)
- **Community (5)**
- Community Atmosphere

Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others? (CONTINUED)

Residents:

POSITIVE

- Community feel
- Community oriented (3)
- Compact - No need to go to Tulsa
- Congenial
- Conservative (2)
- **Convenient (7)**
- Cosmopolitan
- Cozy
- Culturally rich
- Developing
- Different (2)
- Down home
- Downtown BA is revamping
- Easily traveled
- Easy
- Easy living (2)
- Easy to get around (2)
- Eclectic
- Economical
- Energized
- Entrepreneurial
- Evolving
- Excellent employment
- Exciting
- Exciting and growing
- Extraordinary school - has premier, state of the art marching band- literally the best in the nation
- **Family (6)**
- **Family friendly (21)**
- **Family oriented (10)**
- Family oriented community
- Family town (2)
- Family-centered community
- Fantastic amenities
- Farmer' Market is awesome
- Fewer unique retailers downtown
- Finally getting "cool"
- Football
- **Friendly (68)**
- Friendly / awesome people
- Friendly community
- Friendly mid-size community
- Friendly people (3)
- Friendly people and children
- Friendly town
- Friendly, Safe, Multi-cultural,
- **Fun (15)**
- Fun and full of things to do
- Fun downtown
- Generous
- Getting better all the time!
- Good assortment of services, entertainments, shopping
- Good community
- Good cost of living
- Good dining, but not enough good dining
- Good family life
- Good for raising kids
- Good people
- Good place to live
- Good place to raise a family

Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others? (CONTINUED)

Residents:

POSITIVE

- Good places to eat
- Good public schools
- Good retail options
- Good schools
- **Great (6)**
- Great activities
- Great community (3)
- Great community feel
- Great dining
- Great downtown events
- Great for kids
- Great golf
- Great location
- Great new downtown
- Great people
- **Great place to live (5)**
- Great place to raise a family
- Great place to raise kids
- Great police department
- Great restaurants
- Great school (3)
- Great schools and churches
- Great small town
- Great snow removal
- Great senior Center
- Great weather
- Green
- **Growing (39)**
- Growing and trying hard
- Growing bigger and better all the time
- Growing city (2)
- Growing community (3)
- Growing entertainment and dining district.
- Growing, vibrant downtown
- Handy
- Handy to all activities and businesses of all types
- Happy (4)
- Has all the amenities
- Has everything
- Heritage
- Highway access
- Historic (3)
- Historical sited being destroyed
- **Home (5)**
- Hometown atmosphere
- **Hometown (5)**
- Hometown atmosphere
- Hometown pride
- Homey (4)
- Hopping little big town
- Improving
- Inexpensive
- Interesting
- Interesting historical museum
- It used to be a very small town when I moved here in 1964
- It's a big, small-town
- Just big enough
- Kind
- Laid back (3)
- Large suburban area with a small town feel.

Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others? (CONTINUED)

Residents:

POSITIVE

- Large town, small town atmosphere
- Less traffic
- Livable
- Living
- Location
- Lots going on.
- Lots of fun, little fuss.
- Lots of green space
- Lots of restaurants
- Lots to do (2)
- Love our downtown area
- Love the roses
- **Low crime (4)**
- Low crime rates
- Lower crime
- Many dining and shopping options
- Metropolitan
- Modern
- Modernizing/on the move
- Moving forward
- Moving up!
- Neat
- Neat shopping
- Needs more night life
- **Nice (10)**
- Nice downtown area
- Nice people
- Nice place to live
- No traffic (although that is changing rapidly)
- Not progressive
- Not too big
- Not too big, not too small
- Now it's a very safe large city
- Old fashioned friendliness
- Organized
- Outstanding schools
- **Peaceful (5)**
- Peaceful community
- Pleasant (2)
- Pleasant nice safe place to live
- Plenty of things to do
- Positive
- **Pretty (6)**
- **Progressive (7)**
- Quaint (3)
- Quaint but trying to improve its hip factor
- Quality education
- **Quiet (13)**
- Quiet suburbs
- Quiet, friendly, active
- Quiet, Safe
- Quite
- Rapid growth
- Reliable
- Religious mecca
- Renewal
- Rose District is a fun place to hang
- Roses
- Rough Streets
- **Safe (60)**

Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others? (CONTINUED)

Residents:

POSITIVE

- | | | |
|--|--|---|
| <ul style="list-style-type: none">• Safe and clean city• Safe city• Safe community (2)• Safe family community• Safe place• Safe, close to metro area attractions• Safety• Scenic• Self-contained• Serene• Shopping, cycling, roses• Simple (2)• Slow-pace• Small but growing• Small community (2)• Small community feel• Small town (6)• Small town atmosphere (5)• Small town attitude• Small town attributes with lots of opportunities• Small town but acts big• Small town culture• Small town feel (8)• Small town feel but large town things to do• Small town feel with city perks• Small town feel with large city amenities• Small town feel with plenty to do• Small town feeling for a big town• Small town living• Small town values | <ul style="list-style-type: none">• Small town with a lot of people• Small town with big conveniences• Small town with big features• Small town with big options• Sophisticated• Spiritual• Spread out• Still has a small town feel• Stress-free• Subtle Beauty• Suburb of Tulsa• Suburban Living with Small Town Mentality or Feel• Surprising• Surprising number of really good restaurants• Surprisingly advanced• Thriving• Transitional• Transportation friendly• Trendsetting• Trying to grow its Main Street• Unique (7)• Unique downtown• Up and coming (3)• Up to date• Upscale with a quaint, easygoing vibe• Used to be a good place to live• Variety• Very close to area lakes• Vibrant (4)• Visionary | <ul style="list-style-type: none">• Warm friendly• Welcoming (2)• Well policed• Where everything you want is nearby• Wonderful• Wonderful farmers market |
|--|--|---|

Visit Broken Arrow

Resident Survey Respondents

What words would you use to describe Broken Arrow, OK to others? (CONTINUED)

Residents:

NEUTRAL/NEGATIVE

- A town that needs more than one high school
- Don't like what they have done to the farmers market
- Expensive
- Hard to find downtown
- High taxes
- N/a
- Our governing bodies have their act together
- Past five years miss the boat
- Poor parking downtown
- Some overly restrictive laws
- Too big

Visit Broken Arrow

Community Leaders Survey



Summary & Observations:

- **55 community leaders** responded to an online survey in addition to interviews conducted with leaders during the course of the research study.
- The 55 leaders that responded represent a **broad cross-section of involvement in the Broken Arrow community** and local business affairs. A healthy representation of the responses came from leaders directly involved in the chamber and civic affairs as well as sales and marketing.
- Leaders **rated Broken Arrow as a good place to live and work, as a destination for the Rose District, a place to dine and retire.** However, the community leaders of Broken Arrow indicate there is still work to be done to promote Broken Arrow as a destination for business travelers and for weekend getaways.
- Leaders were **most satisfied with Broken Arrow's casual dining, unique local shopping and festivals and events.** Large scale retail shopping rated as the lowest in satisfaction among leaders.
- **Leaders rated local/unique boutiques in a shopping village and music concerts in a lakeside setting as the most appealing activities or experiences to consider.** When evaluating the merit of developing new or expanding existing activities you must keep in mind that travelers have the potential to make economic impact 365 days/nights a year. Therefore, investment in those activities that have the potential to drive the most overnight stays will have the greatest economic impact.
- Leaders indicate that promoting more attractions,, special events/festivals and a lively downtown would attract more overnight visitors.
- The leaders overall comments indicate a **positive attitude and perception related to Broken Arrow as a place to visit.**

Purpose

The research team surveyed local travel industry and community leaders to identify the perceptions of Broken Arrow as a travel destination. A survey instrument was developed to help identify the strengths, weaknesses, opportunities and threats related to the promotion of Broken Arrow as a destination.

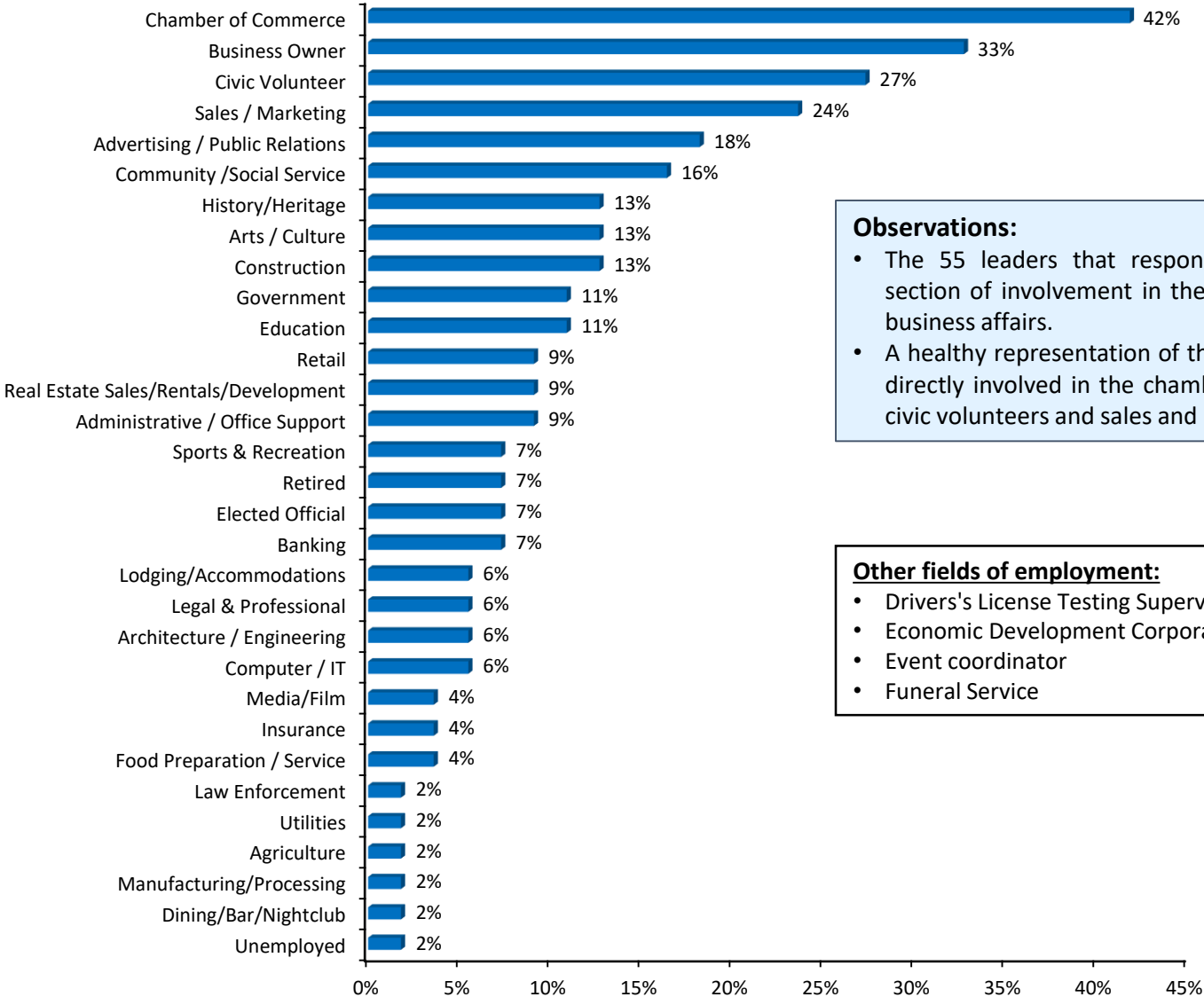
Methodology

Visit Broken Arrow provided YSI with a database of community leaders that included elected officials, Chamber of Commerce leaders and travel industry leaders. An online survey instrument was prepared by the Young Strategies research team and approved by Visit Broken Arrow staff. A total 176 community leaders were invited by email to take the community leader survey online; 55 surveys were received from leaders including elected officials, board members, civic volunteers, hoteliers, restaurateurs, attractions and various business leaders. N = 55



Please indicate your field(s) of employment, leadership or involvement in Broken Arrow.

n=55



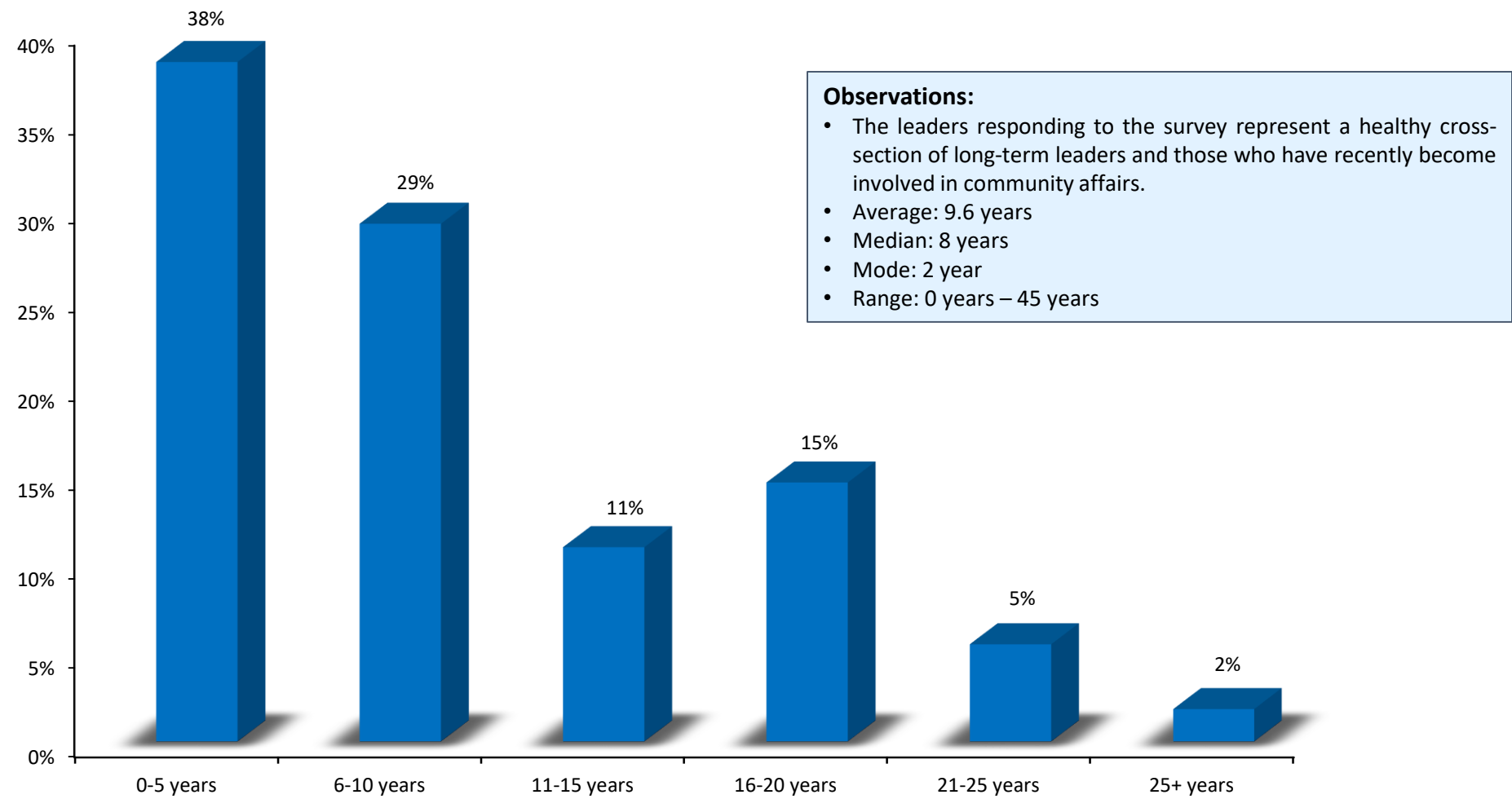
Observations:

- The 55 leaders that responded represent a broad cross-section of involvement in the Broken Arrow community and business affairs.
- A healthy representation of the responses came from leaders directly involved in the chamber as well as business owners, civic volunteers and sales and marketing.

Other fields of employment:

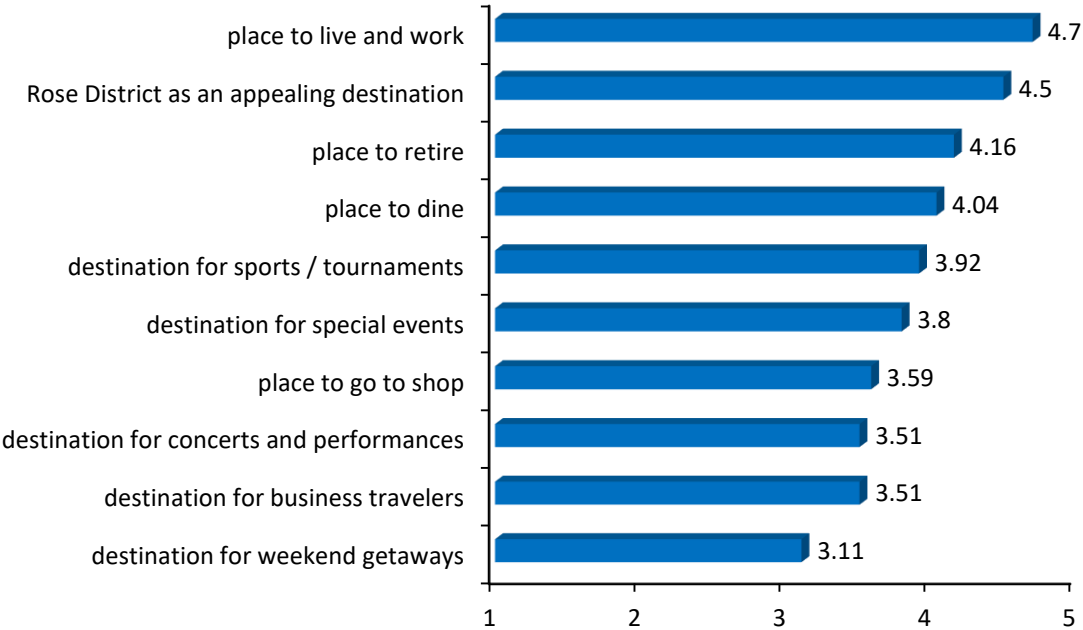
- Drivers's License Testing Supervisor
- Economic Development Corporation
- Event coordinator
- Funeral Service

How long have you been actively involved in Broken Arrow area community affairs and/or leadership? n=55



Rate your current perception of Broken Arrow as a...

n=54



Observations:

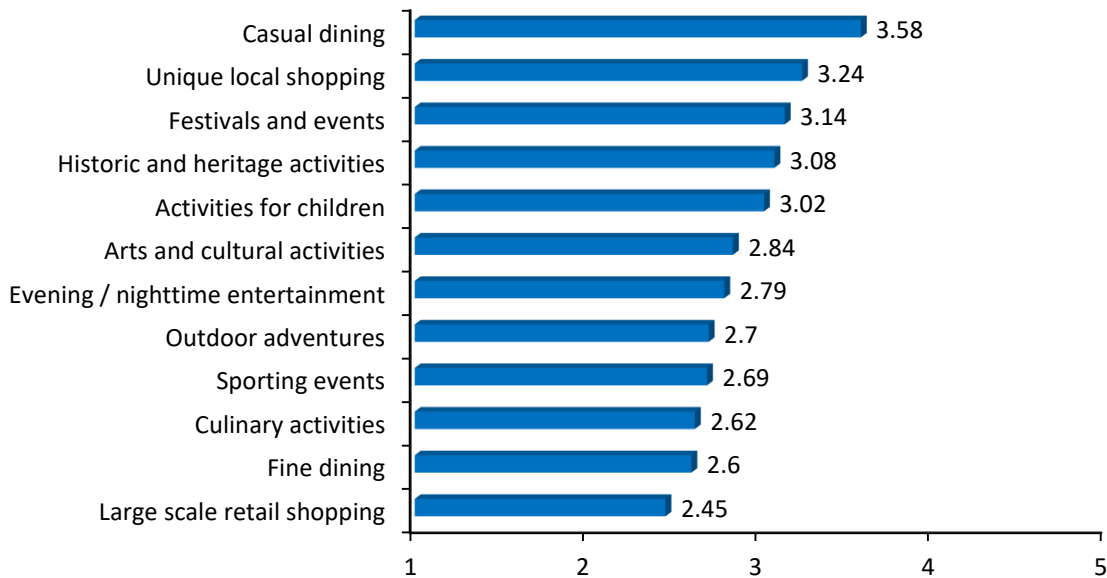
- Leaders surveyed rated Broken Arrow as a good place to live and work. As the graph illustrates, the community leaders of Broken Arrow indicate there is still work to be done to promote Broken Arrow as a destination for business travelers and for weekend getaways.

Verbatim Comments:

- BA needs an ice rink for ice Hockey. Take tips from Dr Pepper centers all over Dallas/ Frisco area. We travel to kansas, Dallas & Mo for hockey. Tulsa has one rink off of Mingo and it is very run down. This would be a great draw for people to BA.
- Because of its proximity to Tulsa, many may not consider BA as a "destination" spot. Recent events and activities may alter that opinion in time.
- Broken Arrow does not provide anything one cannot get in Tulsa. We need something unique.
- Rose District is amazing

Answer Options	Excellent (5)	Good	Average (3)	Poor	Very poor (1)	N/a	Rating Average
Place to live and work	39	14	1	0	0	0	4.70
Broken Arrow's Rose District as an appealing destination	34	14	5	1	0	0	4.50
Place to retire	22	18	8	3	0	3	4.16
Place to dine	15	27	10	0	1	0	4.04
Destination for sports / tournaments	14	23	12	3	0	1	3.92
Destination for special events	11	24	16	3	0	0	3.80
Place to go to shop	8	26	13	4	3	0	3.59
Destination for business travelers	9	16	22	5	1	1	3.51
Destination for concerts and performances	6	25	14	6	2	0	3.51
Destination for weekend getaways	6	10	23	12	2	1	3.11

When friends, family or business guests visit you, please rate your level of satisfaction with the following Broken Arrow experiences. n=53

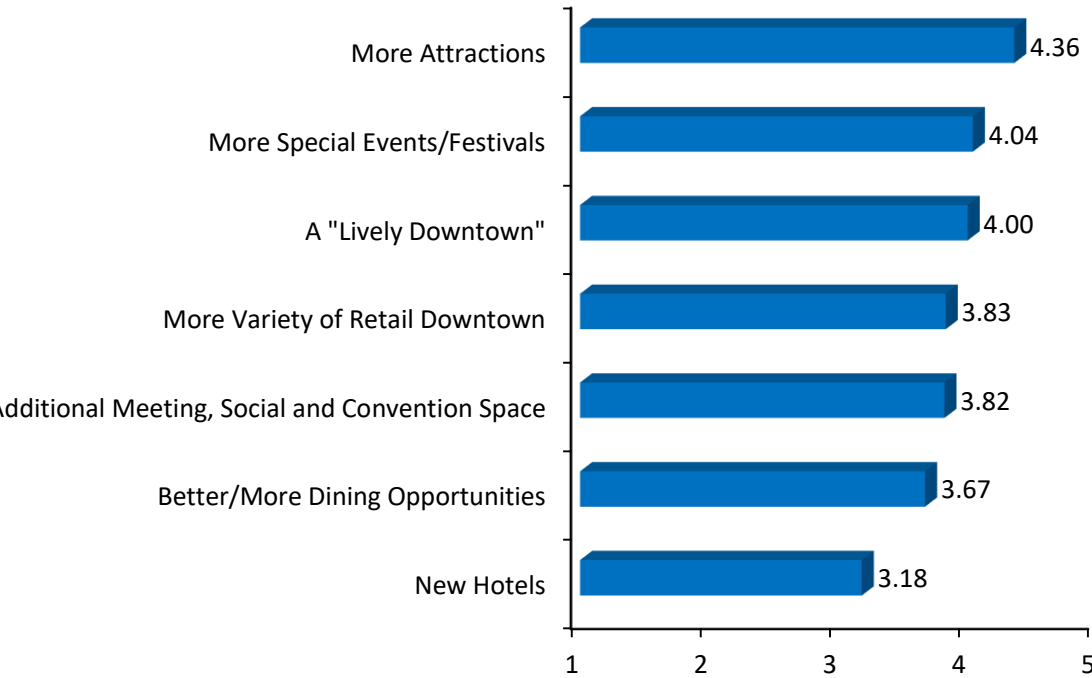


	Very satisfied (4)	Satisfied (3)	Dissatisfied (2)	Very dissatisfied (1)	N/A	Rating Average
Casual dining	31	20	1	0	1	3.58
Unique local shopping	16	30	4	0	3	3.24
Festivals and events	15	29	6	1	2	3.14
Historic and heritage activities	12	30	6	1	4	3.08
Activities for children	8	33	3	2	7	3.02
Arts and cultural activities	3	37	9	1	3	2.84
Evening / nighttime entertainment	7	24	17	0	5	2.79
Outdoor adventures	5	23	17	1	7	2.70
Sporting events	6	18	17	1	11	2.69
Culinary activities	2	24	14	2	11	2.62
Fine dining	4	24	15	4	6	2.60
Large scale retail shopping	2	21	23	3	4	2.45

Observations:

- Leaders were most satisfied with casual dining, unique local shopping and festivals and events.
- Large scale retail shopping was rated the lowest satisfaction among respondents.

What does Broken Arrow need to promote in order to attract more overnight visitors? n=53



Observations:

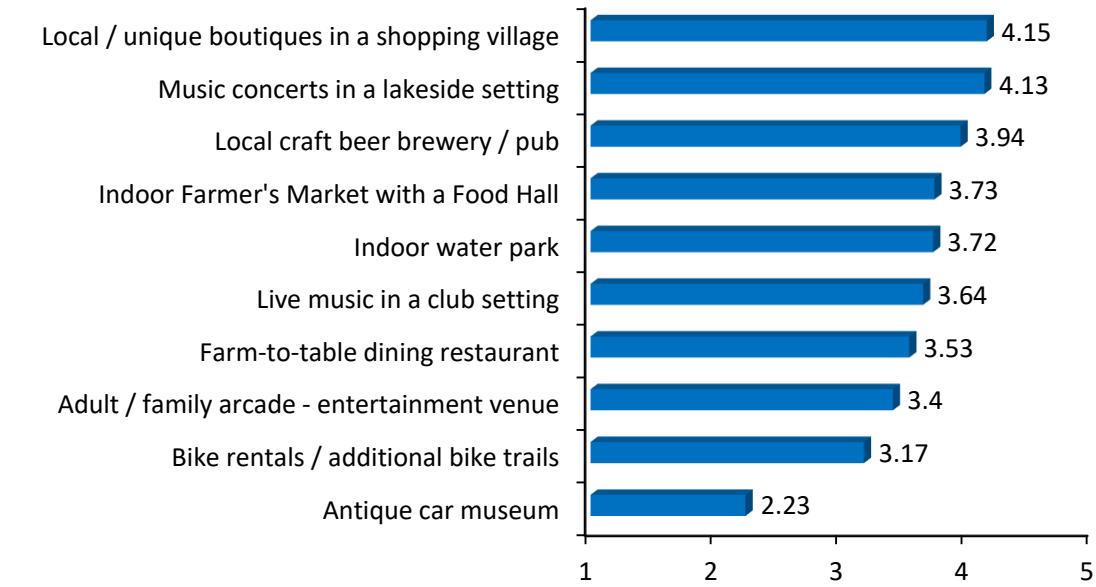
- Leaders indicate that promoting more attractions,, special events/festivals and a lively downtown would attract more overnight visitors.

Other responses:

- A downtown hotel would be great
- Amusement attractions like waterpark, zoo, gardens,
- Better shopping
- Current projects should help fill the need for new hotels. BA still needs more dining as wait times in area restaurants are ridiculously long.
- Events that take place over multiple days, so they will stay overnight
- Fine dining is in short supply...Casual dining is very available
- IKEA, festival grounds, zipline park, city lake, water sports center
- More large retail shopping and tourist attractions
- Suburban proximity to Tulsa events

	Highest	High	Somewhat	Low	Not at all	No Opinion	Rating Average
More Attractions	25	23	4	1	0	0	4.36
More Special Events/Festivals	18	21	8	4	0	0	4.04
A "Lively Downtown"	17	21	11	3	0	0	4.00
More Variety of Retail Downtown	15	17	16	4	0	0	3.83
Additional Meeting, Social and Convention Space	19	15	8	7	2	1	3.82
Better/More Dining Opportunities	7	27	12	6	0	0	3.67
New Hotels	8	13	15	10	5	1	3.18

What types of activities or experiences would inspire your friends and colleagues to visit Broken Arrow, Oklahoma? n=53



Observations:

- Respondents rated local/unique boutiques in a shopping village and music concerts in a lakeside setting as the most appealing activities or experiences to consider.
- When evaluating the merit of developing new or expanding existing activities you must keep in mind that travelers have the potential to make economic impact 365 days/nights a year. Therefore, investment in those activities that have the potential to drive the most overnight stays will have the greatest economic impact. Overnight visitor travel parties typically spend 2-3 times more than daytrippers.

	Extremely	Very	Somewhat	Slightly	Not at all	Rating Average
Local / unique boutiques in a shopping village	21	19	11	1	0	4.15
Music concerts in a lakeside setting	21	24	3	4	1	4.13
Local craft beer brewery / pub	22	17	6	5	3	3.94
Indoor Farmer's Market with a Food Hall	16	15	15	3	3	3.73
Indoor water park	15	18	9	4	4	3.72
Live music in a club setting	15	15	15	5	3	3.64
Farm-to-table dining restaurant	10	16	17	7	1	3.53
Adult / family arcade - entertainment venue	10	12	20	4	4	3.40
Bike rentals / additional bike trails	7	12	21	7	5	3.17
Antique car museum	0	4	18	16	14	2.23

What words would you use to describe Broken Arrow, OK to others?

Community Leaders:

- A community that is growing but still has small town feel
- A great place to live
- A great place to raise your family
- Affordable
- Balanced
- Bedroom community
- Bedroom community with local charm
- Best place to raise a family
- Big city convenience, small town feel
- Big city, small city feel
- Big town with small town feel
- Charming
- City with small town feel
- Comfortable
- Community driven
- Community oriented
- Creative downtown
- Cultural
- Encompassing
- Everything needed
- Excellent education system -- K-12; higher edu & career tech
- Excellent place to raise a family
- Exciting
- Expanding
- Family Centered
- Family friendly
- Family oriented
- Friendly (8)
- Friendly and community oriented
- Friendly community
- Friendly large community
- Fun
- Good roads
- Great home town community
- Great place to live and work
- Great place to raise a family
- Great place to raise a family and live
- Great schools
- Growing (4)
- Growing suburb still connected to its history
- Hometown feel (2)
- Hospitable
- In progress
- Innovative
- Interesting
- Inviting
- Larger city with small town feel
- Livable
- Lots of options
- Low cost of living
- Mayberry
- Much improved
- Not progressive
- Old school
- Pleasant
- Quaint (5)
- Revitalized
- Rose District
- Rose district impressive
- Rural
- Safe (6)
- Safe and forward thinking.
- Safe city close to Tulsa
- Small town
- Small town feel
- Small town feel with big city amenities. (2)
- Small town feel with city amenities
- Small town feel with large town opportunities and activities
- Suburban
- The old and the new
- Trendy
- Unique
- Visit the Rose District
- Welcoming
- Welcoming/friendly
- Youth sports location

What makes Broken Arrow a unique place for people to visit?

Community Leaders:

Top 3:

1. Amenities/Attractions/Events (47)
2. Atmosphere
3. Ease of Navigation

Amenities/Attractions/Events (47)

- All major amenities: sports, shopping, dining, recreation
- Amenities
- BAPAC
- Bass Pro
- BA High school Sports
- Historical Markers
- Lots of things to do & affordable
- Parks
- Shopping
- Events (2)
- Different events to attend
- Downtown (3)
- Main Street/Rose District
- Mom/pop shops
- Only the rose district
- Restaurants and shops
- **Rose District (12)**
- Rose District growth
- Rose District, landscaping, unique retail business, dining,
- Shows at the PAC
- Special pockets of entertainment
- Sporting complexes
- The Rose District (4)

Amenities/Attractions/Events (continued)

- Various businesses
- Warren Theater, BA-PAC, Bass Pro
- Warren Theatre (3)
- Youth sports activities
- Youth sports venues

Atmosphere (22)

- Atmosphere
- Atmosphere everyone is so kind & welcoming
- Big city, small city feel
- Community
- Family friendly
- Family oriented
- Friendliness
- Friendly
- Friendly citizenry
- Hometown feel
- Loved by its citizens
- Safe (2)
- Safe area
- Safety
- Small town feel
- Small town feel in a large metro area
- Small town feel with big town options
- The downtown is quaint and unique
- The people
- Unique
- Welcoming

Ease of navigation (3)

- Easy of getting around
- Easy to get around
- Easy to navigate around, friendly and helpful people

Miscellaneous (9)

- Affordable
- Convenient
- Great view of Tulsa
- History
- Live springs still flow
- Lynn Lane Traffic
- Mild winter
- Not really any unique attractions
- Schools

What towns/destinations should Broken Arrow leaders visit/study to get ideas to make Broken Arrow more appealing as a destination for travelers in the future?

- Alexandria, VA
- Asheville N.C.
- Asheville North Carolina
- Atlanta, GA
- Austin (3)
- Austin TX, Provo Utah, Fort Collins Co., Corvallis Oregon
- Austin, TX
- Baraboo Wisconsin-always have something going on for visitors
- Bay Area Children's Discovery Museum
- Being different...offering a unique experience that is rare to the surrounding cities
- BRANSON MO.
- Charleston
- Colorado
- Coronado Island (San Diego)
- Crested Butte, CO
- Des Moines
- Edmond
- Eureka Springs (2)
- Fort Worth
- Frisco, TX (2)
- Gatlinburg
- Grapevine, TX (2)
- Greenville, SC
- Holiday historic home/business tours
- Hot Springs
- Innovation Hubs
- Kansas City, KS (2)
- Madison, Georgia
- Naperville, IL
- Nashville
- Norman
- North Dallas Area
- OKC
- OKC (water sports), Pawnee Lake, Shell Lake (Sand Springs), Eureka Springs (clubs/bars)
- Outdoor concert amphitheater in Maryland Heights MO formerly known as Verizon Amphitheater
- Overland Park
- Paducah, Kentucky
- Plano / Frisco, TX
- Portland, OR
- Rodgers, AR (shopping village), Branson (Celebration City - now closed),
- Round Rock, TX
- San Antonio
- Santa Fe ,NM
- Stillwater
- Streets of St Charles (Missouri)
- Wilmington, NC
- Wichita

Are there other specific topics or issues you would like to be addressed in the Broken Arrow Convention and Visitors Bureau destination vision/strategic plan?

- Arts and Music for The Rose District
- Capitalize the Indian Springs Sports Complex for national tournaments
- Complete the bike trail along the Creek Turnpike. Investigate options for outdoor activities (mountain bike trail area).
- Congested traffic in particular areas. Residents are avoiding problem areas, which feature new retail.
- Dog Park...fishing for kids... Kids museum
- Find ways to listen more to business leaders and nonprofits. They interact with the general public and may have a better feel for the community than officials.
- Funding for arts destination via hotel/motel tax
- I believe the city should market & support events that are put on by individuals in the city that benefit the community and generate sales tax revenue for the city. There are huge events that take place in our city that are never mentioned and it benefits the community so I strongly believe they should all be marketed strongly so that the community has a chance to participate and that would help grow all of the events as well as continue to raise sales tax revenue.
- I think a collaborative effort with other entities that can support conferences would be helpful. NSU-BA has space on Fridays and weekends, but there are no other amenities there. The Hillside convention area is coming along nicely, but the traffic is horrendous on Lynn Lane and Elm Place. How will BA deal with that growth?
- I think it would be beneficial to ask for and select people from the community to be involved in developing the vision and the strategic plan, not just a survey then community meeting to explain plan. This would create early buy in and advocates for the vision/plan. What is the overarching goal of the plan and what specific steps Broken Arrow will take reach the goal including resources. I would love to be involved in the process and help in any way (email address provided)
- Major retail shopping and making BA a destination city with entertainment, family activities i.e. Amusement park or areas where travel to BA would be beneficial.
- Need more amusement activities to attract leisure guests, need more bars, pubs and restaurants to attract business guests- esp. ones that serve late. Right now there is relatively nowhere that you can get a bite to eat after 9pm unless its fast food
- Need/desire to have more art galleries in Broken Arrow. Specifically, a place for artists to have co-ops to sell their wares. This would be a space for artists, not crafters.
- Provide such unique opportunities for shopping (not big box like the 71st street coordinator) but places that are so different Broken Arrow becomes a destination for the unique and unusual shopping and dining...we become the place to be in the greater Tulsa Area..
- Room buy downs, working with Corporate sector to bring annual meetings to BA, Attraction of new convention business, Transportation from hotels to Rose District and airport
- Sales and marketing. Group sales. Sports. Attract out of town visitors not local visitors.
- Transportation access across town

Are there other specific topics or issues you would like to be addressed in the Broken Arrow Convention and Visitors Bureau destination vision/strategic plan? (CONTINUED)

- We need a professional Convention Recruiter that builds great relationships with local hotel owners to help them market their properties.
- We need to address our sporting venue strengths and market what we have. The theme is something we need to build around and the other things will come. I don't want to see us doing extraneous things like an antique car museum when we have things we are already noted for and we know that would be money well spent.
- We want to see more stringent approval processes in the hospitality sector. Our businesses are not protected by city. Broken Arrow would be a much nicer place to visit if the city did more to protect its residents and small business owners.
- What makes us different? What is our wow factor foundational experience that gets people here?

Do you have any other ideas or suggestions for the future development and marketing of Broken Arrow as a destination for travelers?

- Amusement park
- Broken Arrow needs to work more towards partnering with Tulsa as opposed to trying to create separation from Tulsa.
- Consider marketing several BA positives together -- performance arts shows, restaurant, and hotel packages.
- Define which niche you want to go after- business, leisure, tour groups, corporate groups and go after it full force with a strategic plan. We can't be everything to everyone.
- Develop and market the rose district more
- Explore long-term potential for water feature (riverboat ala San Antonio/OKC) from Kenosha to downtown or PAC area to downtown
- I feel that broken arrow needs to address the impression it gives visually to travelers, how it looks from the highway, does it make people want to take that exit. It looks very run down from the highway (fencing, weeds, trash, no landscaping, no beautiful lighting) lack of a visually stunning interchange) the city looks run down and poor.
- I think more unique dining & shopping; venues with music, parks
- Increase the number of special events....and continue to grow the events park.
- Involve the chamber of commerce more in the planning and marketing of events and conventions.
- Large events/tradeshows but hotels have to be upgraded where business travelers have entertainment and bars within hotels
- Less apartments
- Need to have more art galleries in Broken Arrow. Specifically, a place for artists to have co-ops to sell their wares. This would be a space for artists, not crafters.
- One thing to keep in mind or maybe better understand when developing the vision and strategic plan; why current residents choose to live in broken arrow and not Tulsa. It seems this should be carefully balanced against becoming a popular travel destination.
- Outdoor concert venue (red rocks, co or gexa energy pavilion, Guthrie green-Tulsa). Golf resort or other type of resort.
- Promoting airbnb's, bed and breakfast, within the downtown area...so visitors can walk to downtown activities and venues while staying in a quaint neighborhood and enjoying the rose district
- Research based on experience...what draws you to a place? That is what people desire to experience...something that entertains, brings people together, something that causes an emotional connection to an experience...promote that.
- Safe, thriving downtown with restaurants, pubs and music.
- Sporting events, health care, and business related functions are the most prevalent areas to promote as a destination today. With a limited budget, focus on 2 or 3 main areas with real support and add value before expanding to other areas.
- Sports destination magazine has lots of destinations for sporting events. Might be worthwhile to advertise there.
- Stop building hotels unless you build them within broken arrow near Indian springs. Stop building at 61st and elm.
- Top restaurant- I really like the idea of farm to table
- Yes, I worked for a CVB for 3 years. We should target sports teams and associations, event organizers (SMERF), and business conferences for the convention center.

Visit Broken Arrow

Asset Inventory



Summary & Observations:

In an effort to assess the entire inventory of attractions and attractors that affect the ability of Broken Arrow to compete in the various market segments, the consulting team collected inventory for the entire Tulsa metro region. The proximity of regional assets is very important to Broken Arrow's marketing strategies. Consequently, data was collected for Broken Arrow, Tulsa, the downtown areas for both Broken Arrow and Tulsa as well as the communities of Bixby, Claremore, Miami, Coweta, Fort Gibson, Muskogee, Catoosa, Grand Lake and Sapulpa. The inventory was divided into specific asset categories:

Casinos	Golf Courses	Lodging	Shopping
Identified Districts	Historic	Museums	Spas
Entertainment	Landmarks	Nature/outdoors	Sports
Food and Dining	Libraries	Parks and Recreation	Tours
Galleries	Independent/Unique	Schools	Venues

Within each category, the tourism inventory included the following: asset type, accessibility, operating schedule, admission, location and meeting space availability. The data has been arranged on an excel spreadsheet within which different data points can be compared via pivot tables. In addition to these metrics, the team determined the distance from Broken Arrow to the assets outside of Broken Arrow, excepting Tulsa. It should be noted that the inventory has a list of only the top ten restaurants and retail shops per Yelp and Trip Advisor for each community. Finally, a listing of events throughout the region was collected and includes the event name, location, the sponsor, event type, date and admission cost.

As the inventory indicates, Broken Arrow has a few of the regional products/attractions that contribute to the profile of a competitive destination. The City dominates the region in terms of the number of parks and recreation facilities. The availability of park facilities positions the City to compete very well for business that is sports related or involves outside events, family reunions or youth activities. **The major voids in the inventory for Broken Arrow are: culinary experiences, nightlife options, a major "attractor" and entertainment options. Meeting and exhibit space are very limited at this time in Broken Arrow,** but Tulsa has a significant amount. The feasibility of entering into this market segment at a level greater than what exists will require further study in order evaluate demand.

Visit Broken Arrow

Asset Inventory



Summary & Observations:

There is an opportunity to focus on downtown shopping, which Tulsa has, but it does not overshadow Broken Arrow. The strongest tourism asset within Broken Arrow other than the parks and recreation facilities is the downtown area Rose District with its collection of shops, restaurants and 31 different assets. This area, encompassing the Rose District, has the ability to expand into an active lifestyle center. Downtown Broken Arrow has the look and feel of an upscale district, but requires more residents and additional nightlife activities, boutique shopping, upscale culinary and entertainment options. Encouraging additional retail that is creative, unique and upscale will enhance viability, attract new restaurants, residents and entertainment. If designed, marketed and executed properly, a high energy downtown area could become an attractor.

The region, specifically Tulsa, has product that fulfills those inventory items that are either missing or require enhancement within Broken Arrow. Tulsa has “attractors” while Broken Arrow has “attractions”. Attractors bring visitors to a destination while an attraction is part of the activities that a visitor can enjoy. Broken Arrow does not have an attractor. Consequently, the City as a destination relies mostly on Tulsa. The amount of visitors to Broken Arrow is highly dependent on the number of visitors Tulsa can accommodate. If Tulsa exceeds their carrying capacity, especially in lodging, Broken Arrow receives a portion of the visitor traffic. In the tourism industry, this is known as compression. A major decision for the leadership in Broken Arrow is: *To what degree does the City want to pursue the development of attractors within the City versus depending on compression from Tulsa?* It is important, however, that Broken Arrow embrace the region regardless of attractor development. A very typical approach for destinations located near a major metro area is to market their lodging as the place to stay and promote both local and regional attractions, thereby encouraging longer overnight stays. The majority of assets not in Broken Arrow are within a 45 minute or less drive of Broken Arrow. A visitor, typically, does not recognize political subdivision boundaries when seeking out experiences. Tulsa has great name recognition and as such, Broken Arrow has and will get a portion of the visitor traffic if the City can be presented as part of the Tulsa region, but separate in its on right.

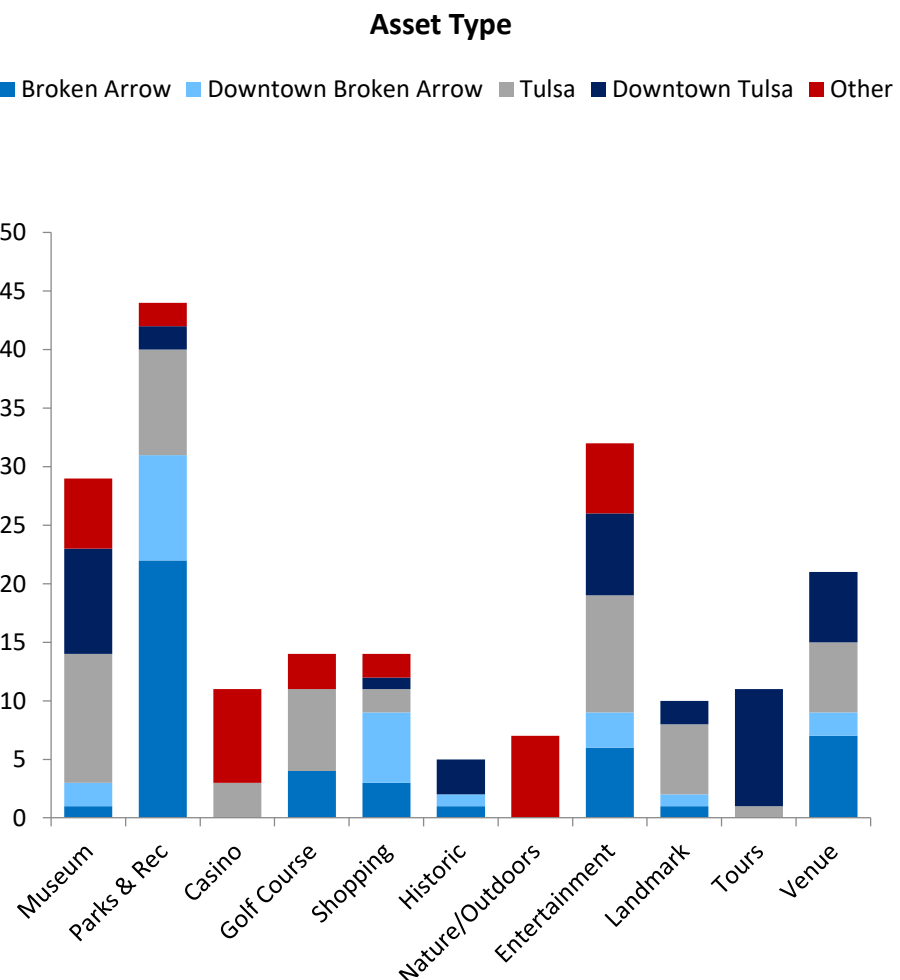
An attractor would assist Broken Arrow with establishing a tourism identity as well as influence lodging, dining and visitor experience decisions by offering a “destination within a destination” product. It was interesting during our site visits that many of the hotels and businesses refer to their locations as being a part of Tulsa. This is an indicator of a need to strengthen Broken Arrow’s destination identity in a way that will complement Tulsa. Strong attractors will strengthen the City’s identity.

Broken Arrow does have the advantage of a small community, with better value than Tulsa. It has a family orientation and it is safe. The fact that there are many high-income residents who live in Broken Arrow, but work in Tulsa will insure a good base for promoting day use/local traffic that will support new retail and restaurants.

Asset Types by City

Observations:

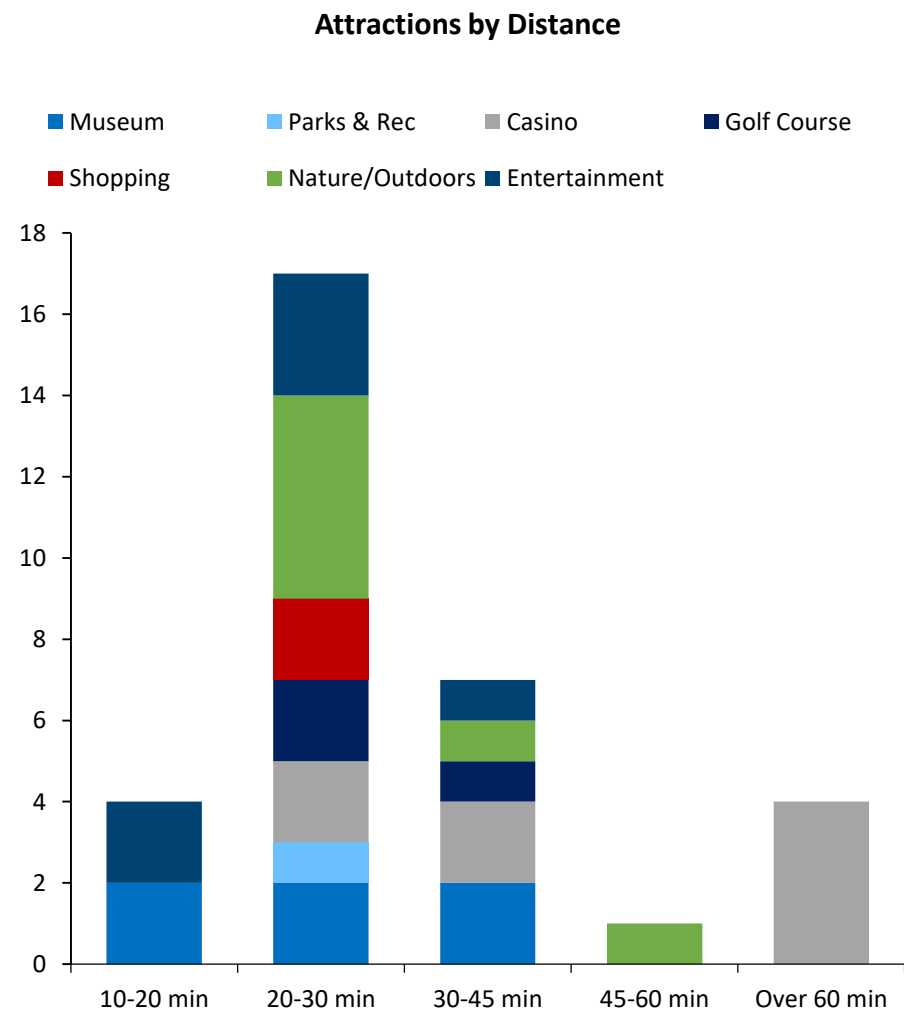
- Broken Arrow has more than half of the parks and recreation facilities in the region. Tulsa drives the region in terms of tourism product inventory.



Attractions Outside Broken Arrow by Distance (excluding Tulsa)

Observations:

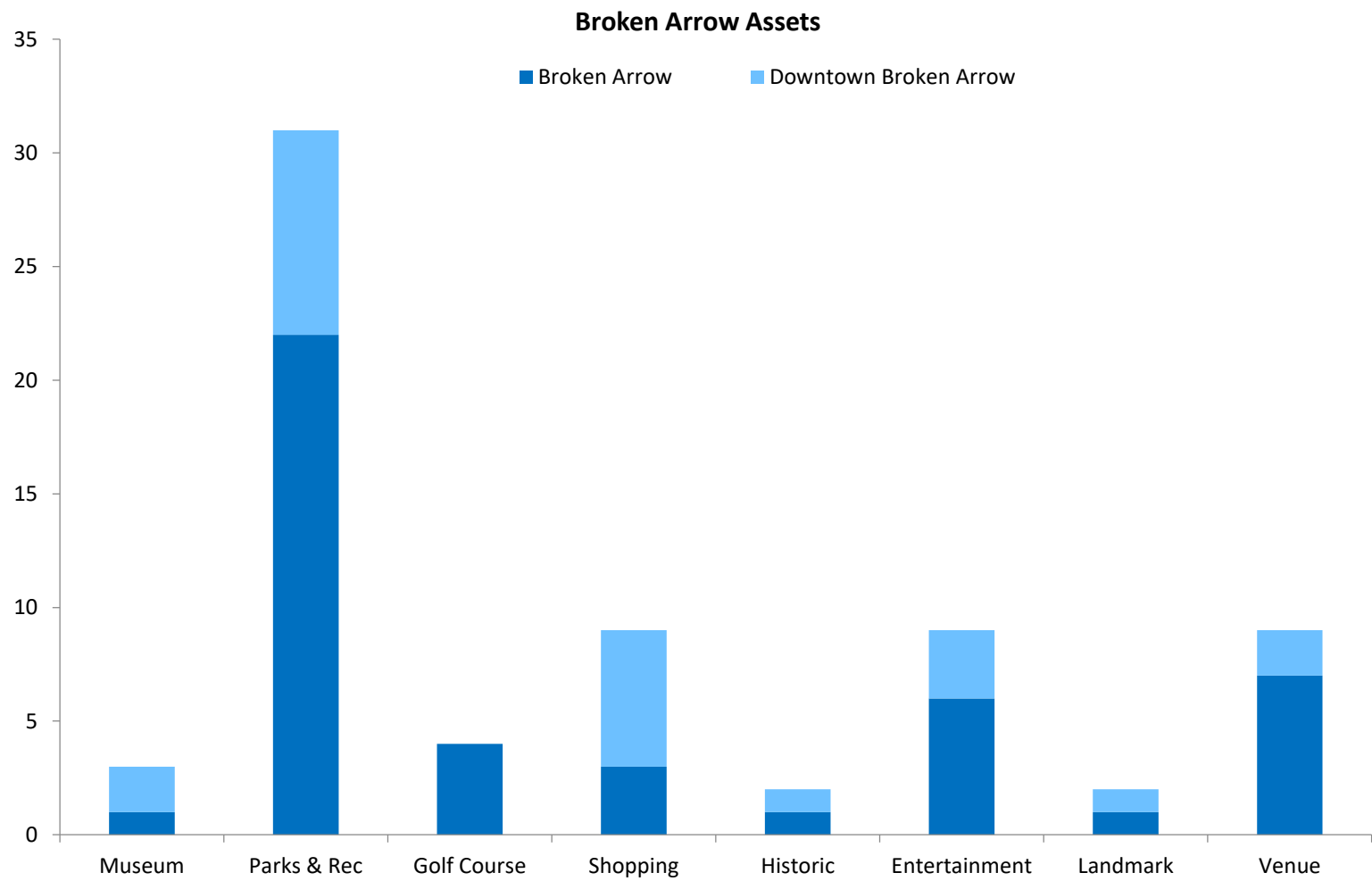
- The majority of regional attractions are within a 30 to 45 minute drive of Broken Arrow.



Broken Arrow Asset Types

Observations:

- There is a total of 53 tourism products within the Broken Arrow inventory, which is 20% of the total products available in the region

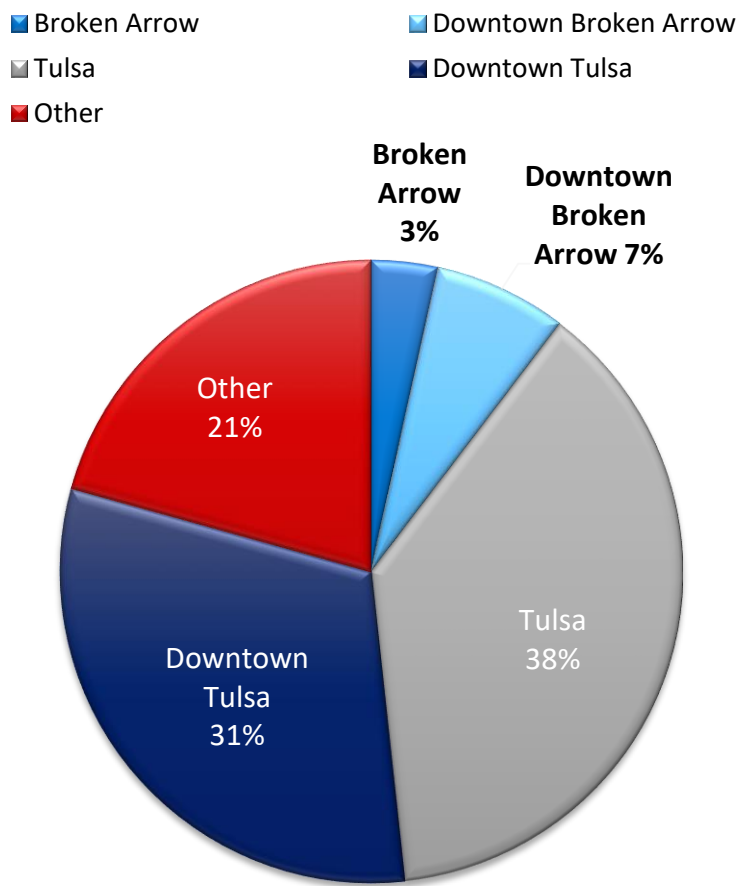


Broken Arrow Comparative Inventory Analysis

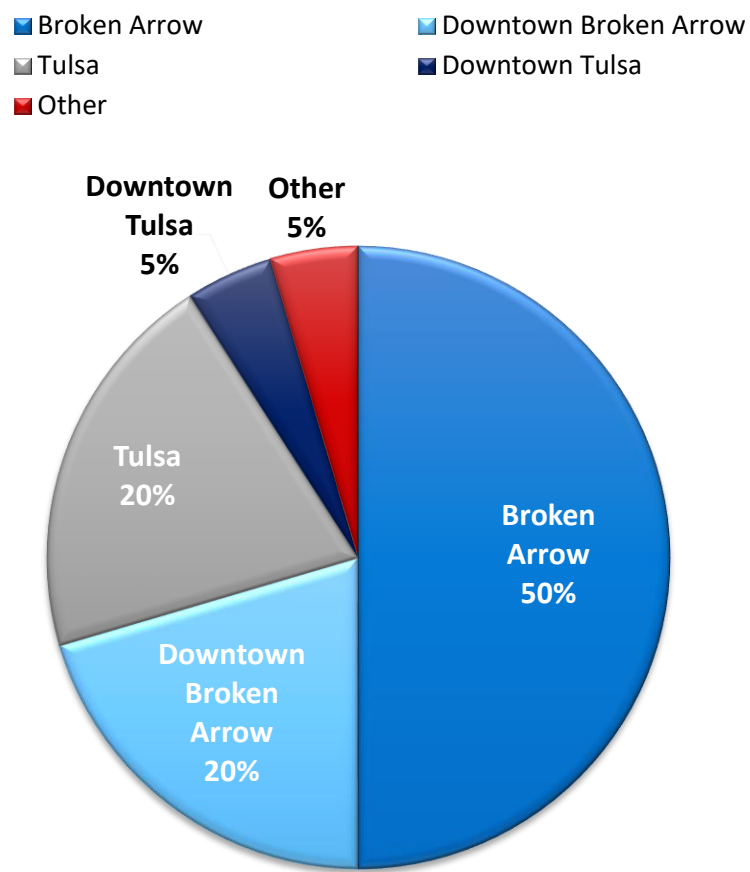
Observations:

- Tulsa has 69% of the museum product comprising 20 facilities while Broken Arrow maintains 70% of the parks and recreation inventory

Museum



Parks & Rec

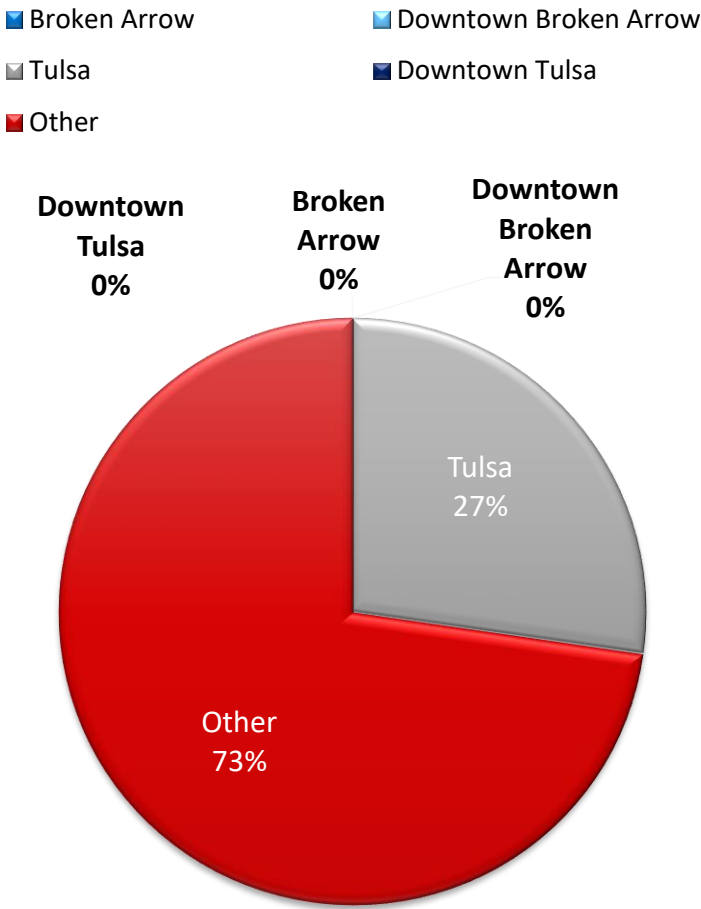


Broken Arrow Comparative Inventory Analysis

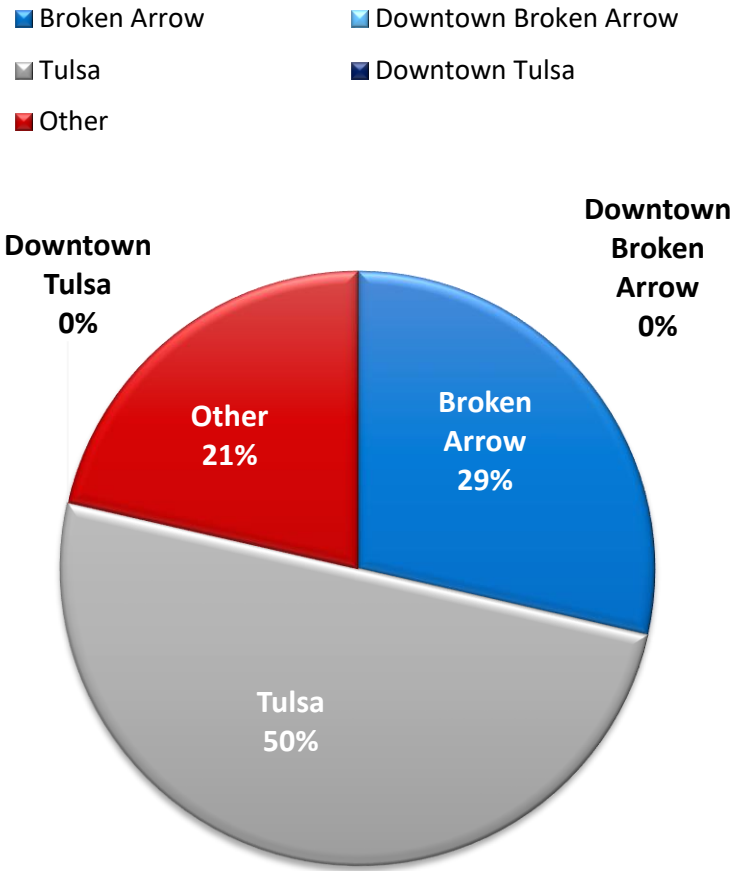
Observations:

- The region has 14 golf courses which provides a great opportunity to market Broken Arrow as a golf destination

Casino



Golf Course

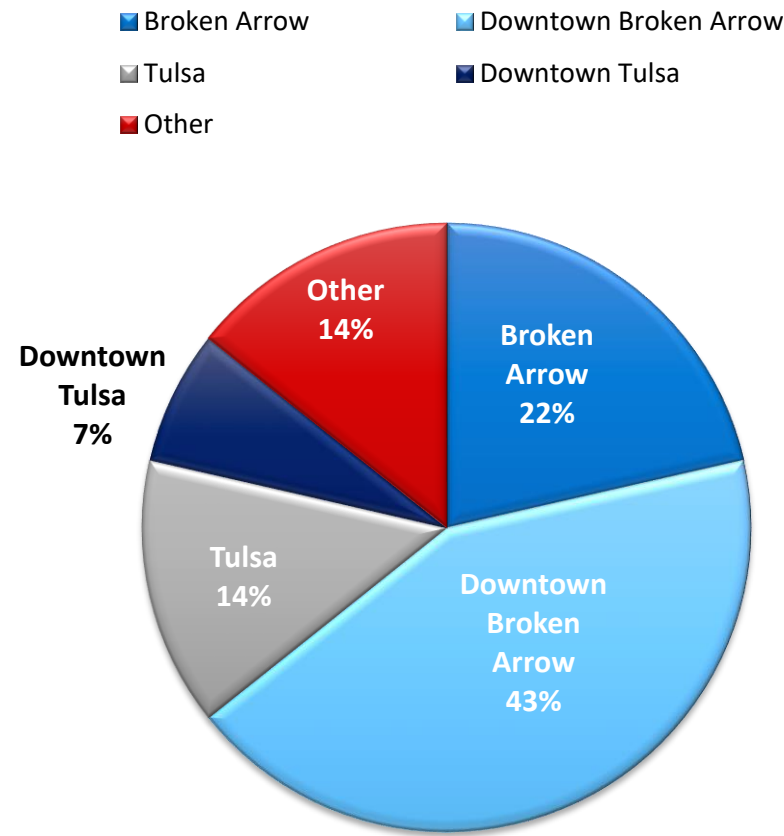


Broken Arrow Comparative Inventory Analysis

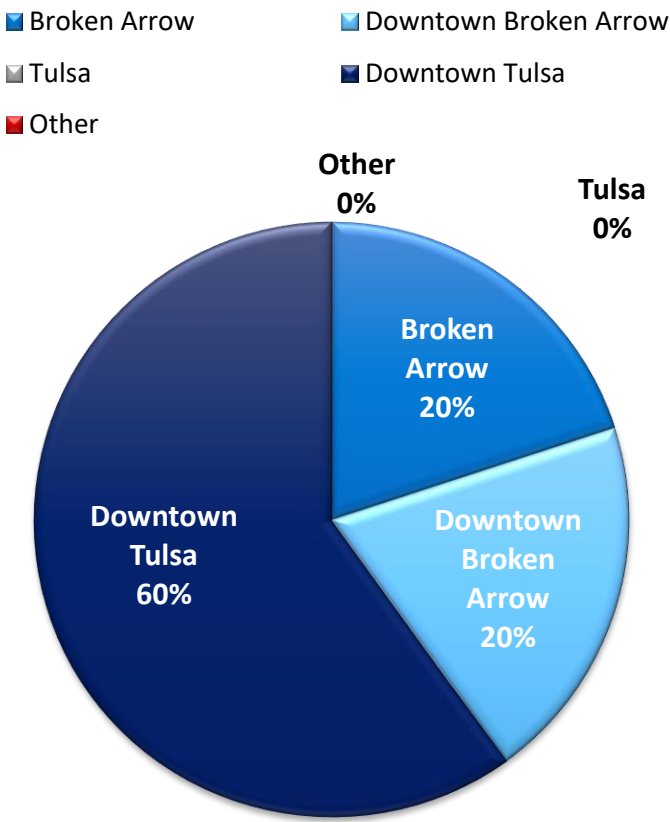
Observations:

- Broken Arrow has more "shopping areas" than Tulsa when one considers the locations of malls

Shopping



Historic



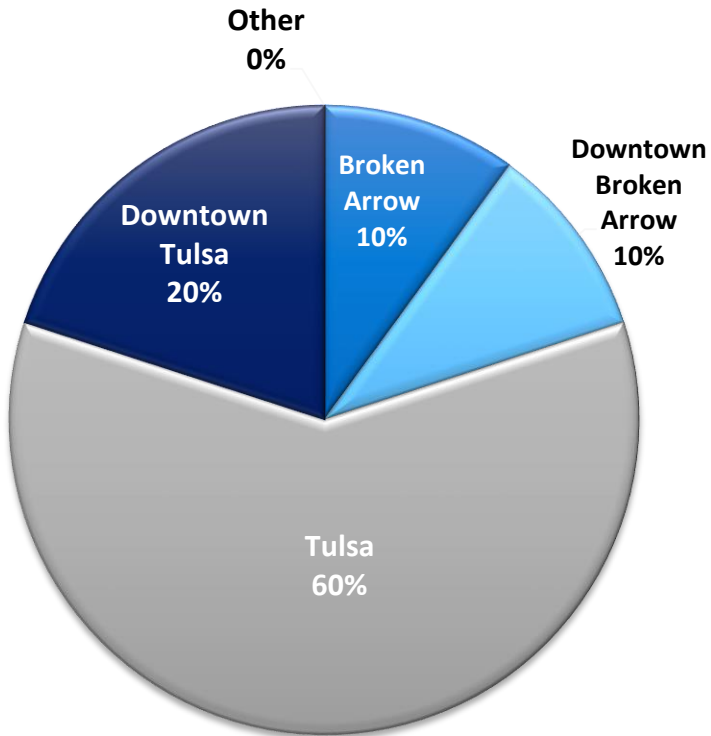
Broken Arrow Comparative Inventory Analysis

Observations:

- Between historic attractions and landmarks, the region has a good base for group tour business

Landmark

- Broken Arrow
- Tulsa
- Other
- Downtown Broken Arrow
- Downtown Tulsa

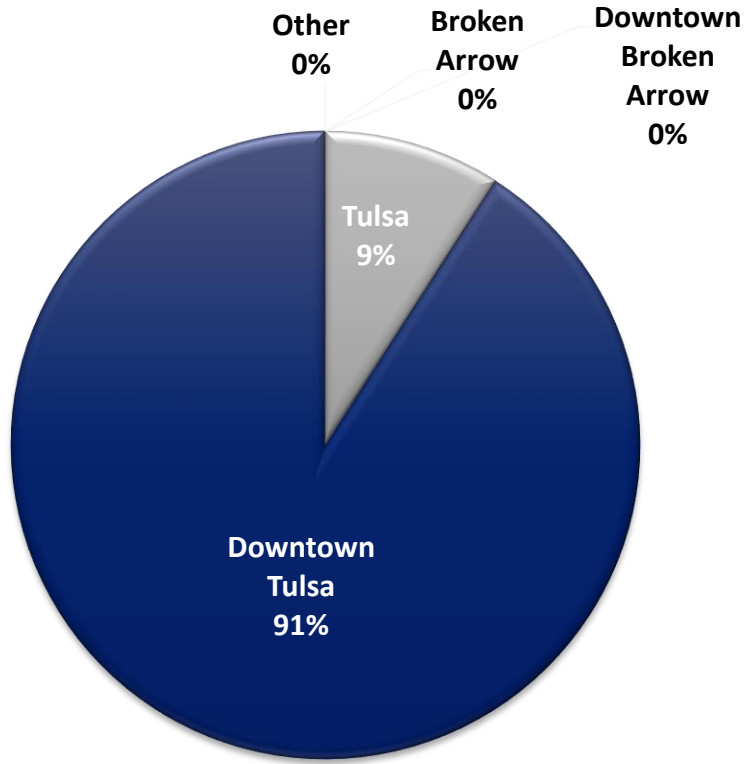


Observations:

- There is an opportunity to develop an “attractor” that could be marketed for tours

Tours

- Broken Arrow
- Tulsa
- Other
- Downtown Broken Arrow
- Downtown Tulsa

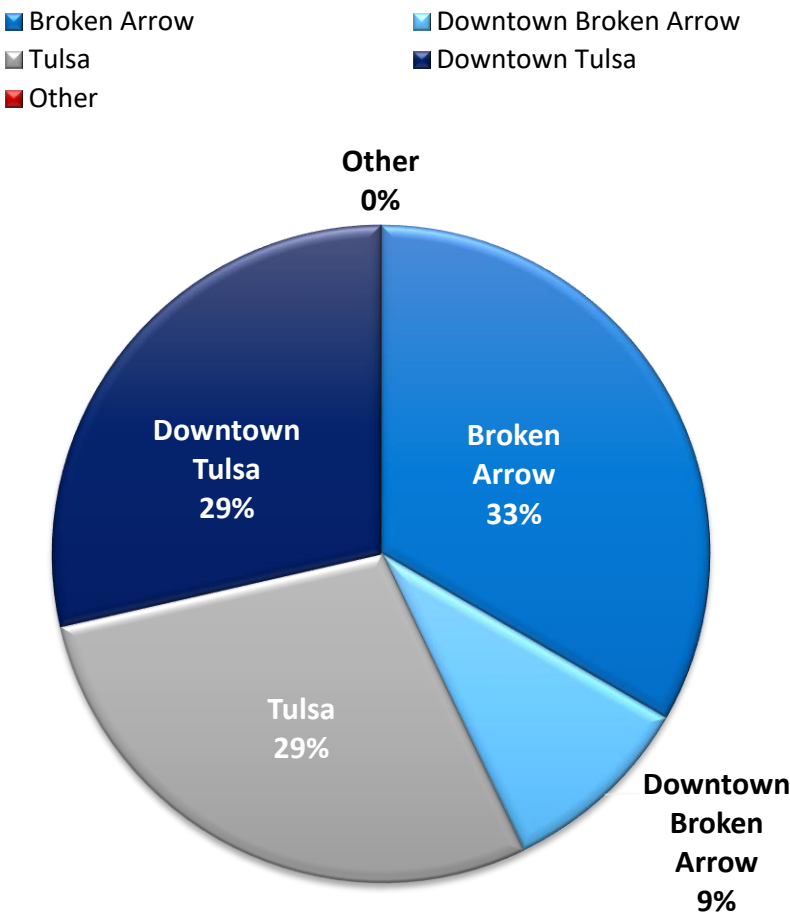


Broken Arrow Comparative Inventory Analysis

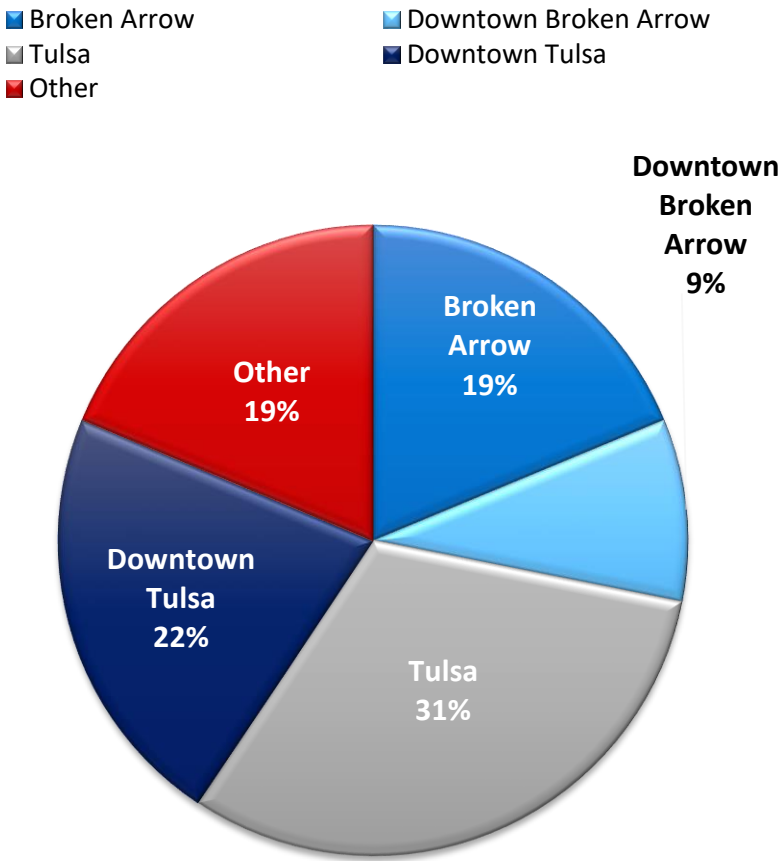
Observations:

- Tulsa has a majority of the entertainment and venue options for the region

Venue



Entertainment



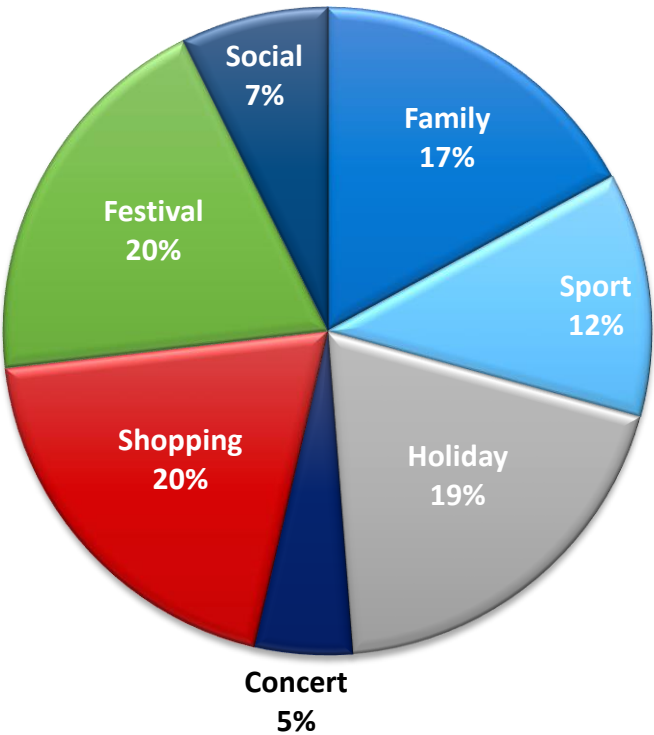
Events by Category

Observations:

- Festivals, shopping, holiday and family comprise most of the events in Broken Arrow

Events in Broken Arrow

- Family
- Sport
- Holiday
- Concert
- Shopping
- Festival
- Social

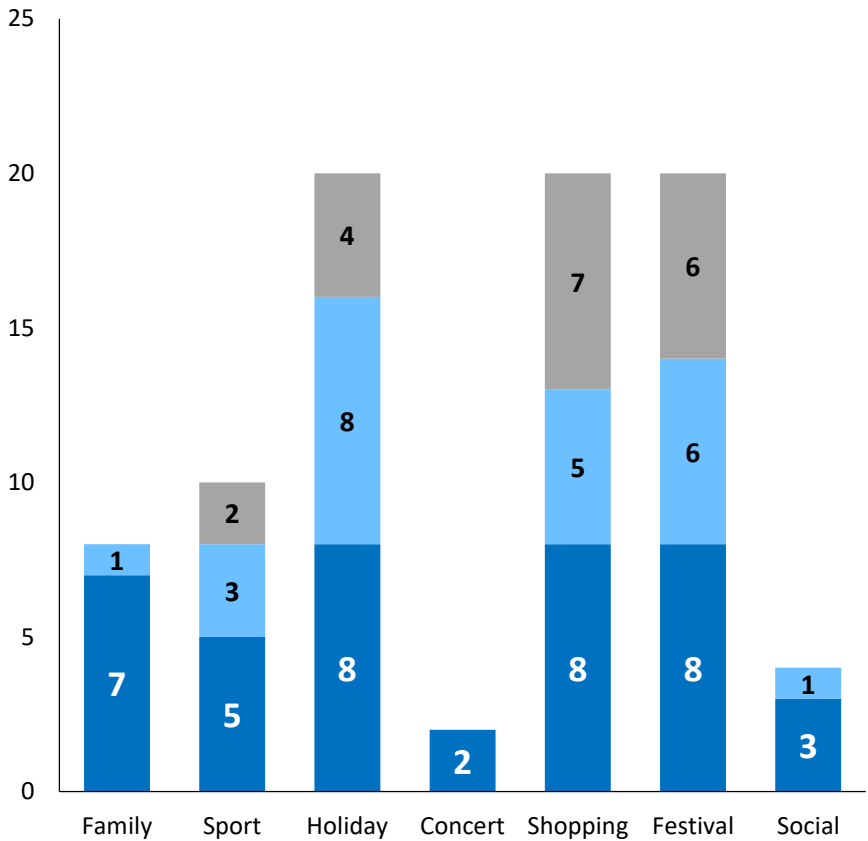


Observations:

- Broken Arrow leads the region in family, concert and social events as well as in sporting events when compared to Tulsa

Events In Surrounding Area

- Broken Arrow
- Tulsa
- Other





Research Summary & Opportunities

- **Broken Arrow is a destination poised for growth, continue master plan for development, needs new attractors**
- **Need Periods: Hotel supply is overbuilt** and CVB MUST drive demand year-round (Winter, Spring & Fall Sunday/Monday)
- **Leakage:** room nights are being lost to Tulsa hotels just across the line = lost revenue
- **Target Markets:** OK, KS, MO, AR, TX
- **Target Audiences:** adult couples & families; meetings/ small conferences, team sports, convert day-trip to overnight
- **Lifestyles:** active outdoors, sports, shopping
- **Local Perception:** Visitor & resident perception is excellent (unusual), leaders have vision and support planning / growth
- **Need to market the destination:** CVB has been used for operating facilities and dispensing grants. Need to restructure and drive aggressive sales and marketing
- **Direct Sales:** Group sales to fill need periods (sports/meetings)
- **Attractors Needed:** the research identified the need for additional engaging, year-round activities (attractors) that will inspire future visitation.
- **Gateways & wayfinding:** implement plan for gateways, signs, traffic patterns from highway to downtown Rose District

Action Items

- **Restructure BACVB** – create new structure focused on sales and marketing to drive increased room demand.
- **9 Person travel industry focused Board suggested** – lodging (2), dining (2), retail (2), sports (1), attraction (1), City Council (1)
- **Staffing (3)** – Director/Marketing, Group Sales, Office/support
- **Drive increased demand (365 nights) for room nights in hotels** – focus on NEED periods when occupancy is low.
- **Group sales** – hire an experienced team sports & small meetings/conferences sales person to partner with hotels & facilities to drive increased group business.
- **Marketing** – build a brand around the unique name “Broken Arrow”. Develop aggressive strategies for website & digital; social media and traditional marketing in partnership with regional and state DMOs
- **Gateways** – support city in the development of gateways that create a sense of place and direct arriving guests to information and core gathering spots
- **Signage & wayfinding** – visitors can’t spend money if they can’t find the cash registers. A signage system throughout the city will help visitors move-about efficiently and drive increased spending.



Travel PARTY Spending (Total Trip)

Spending Category	Overnight n=106	Daytrip n=105
Average total # in Travel Party	3.4	2.8
Average Length of Stay	2.8 nights	0 nights
Lodging (% of reporting)	\$281.14 (75.6%)	\$0.00 (0.0%)
Shopping (% of reporting)	\$163.50 (55.3%)	\$123.23 (49.1%)
Dining / Food (% of reporting)	\$187.20 (89.4%)	\$72.83 (80.6%)
Events & Festivals (% of reporting)	\$156.84 (15.4%)	\$83.39 (16.7%)
Attractions (% of reporting)	\$132.03 (54.5%)	\$137.77 (28.7%)
Local Transportation (% of reporting)	\$93.61 (37.4%)	\$62.00 (28.7%)
Team Sports (% of reporting)	\$153.24 (13.8%)	\$104.07 (13.9%)
Average Total Spending Per Travel Party (% of reporting)	\$851.07* (92.7%)	\$254.09* (84.3%)

Overall Spending per Travel Party:

- Overnight visitor = \$851.07
\$303.95 per day
- Daytrip visitor = \$254.09

Observations:

- Broken Arrow makes more money per party on overnight visitors compared to daytrip visitors. Therefore, the prime focus of marketing efforts for Visit Broken Arrow should be their overnight segment.
- Promotion of the destination to overnight visitors will result in a healthy number of daytrippers as a natural by-product.

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Travel PARTY TAXES (Total Trip)

Spending Category	Overnight n=106	Local Taxes	State Tax (4.5%)
Average total # in Travel Party	3.4	2.8	
Average Length of Stay	2.8 nights	0 nights	
Lodging (% of reporting)	\$281.14 (75.6%)	Lodging Tax \$ 11.25 Sales Tax \$ 11.01	\$12.65
Shopping (% of reporting)	\$163.50 (55.3%)	Sales Tax \$ 6.40	\$7.36
Dining / Food (% of reporting)	\$187.20 (89.4%)	Sales Tax \$ 7.33	\$8.42
Events & Festivals (% of reporting)	\$156.84 (15.4%)	Sales Tax \$ 6.14	\$7.06
Attractions (% of reporting)	\$132.03 (54.5%)	Sales Tax \$ 5.17	\$5.94
Local Transportation (% of reporting)	\$93.61 (37.4%)	Sales Tax \$ 3.39	\$4.21
Team Sports (% of reporting)	\$153.24 (13.8%)	Sales Tax \$ 6.00	\$6.90
Average Total Spending Per Travel Party (% of reporting)	\$851.07* (92.7%)	Lodging Tax \$ 11.25 LOCAL Sales Tax \$ 33.34	\$ 38.28

Overall Spending per Travel Party:

- Overnight visitor = \$851.07
\$303.95 per day
- Daytrip visitor = \$254.09

Taxes per Travel Party:
Lodging ONLY = \$34.91

Lodging 4% = \$ 11.25
Local Sales = \$ 33.34
State Sales = \$ 38.28
Total Taxes Paid = \$ 82.87

Lodging tax is the fertilizer
(fund sales & marketing)
to grow more travelers
who pay sales taxes.

2015 Direct Economic Impact from Overnight Visitors in Paid Accommodations

2015 Spending Category	
Broken Arrow Daily Lodging Room Inventory	782
Broken Arrow Annual Lodging Room Inventory (782 X 365)	285,430
2015 Lodging Occupancy Percentage	60.4%
2015 Lodging Room Nights Occupied	172,400
2015 Average Daily Spending Per Travel Party	\$303.95
Total Overnight (paid lodging) Visitor Spending	\$52,400,980

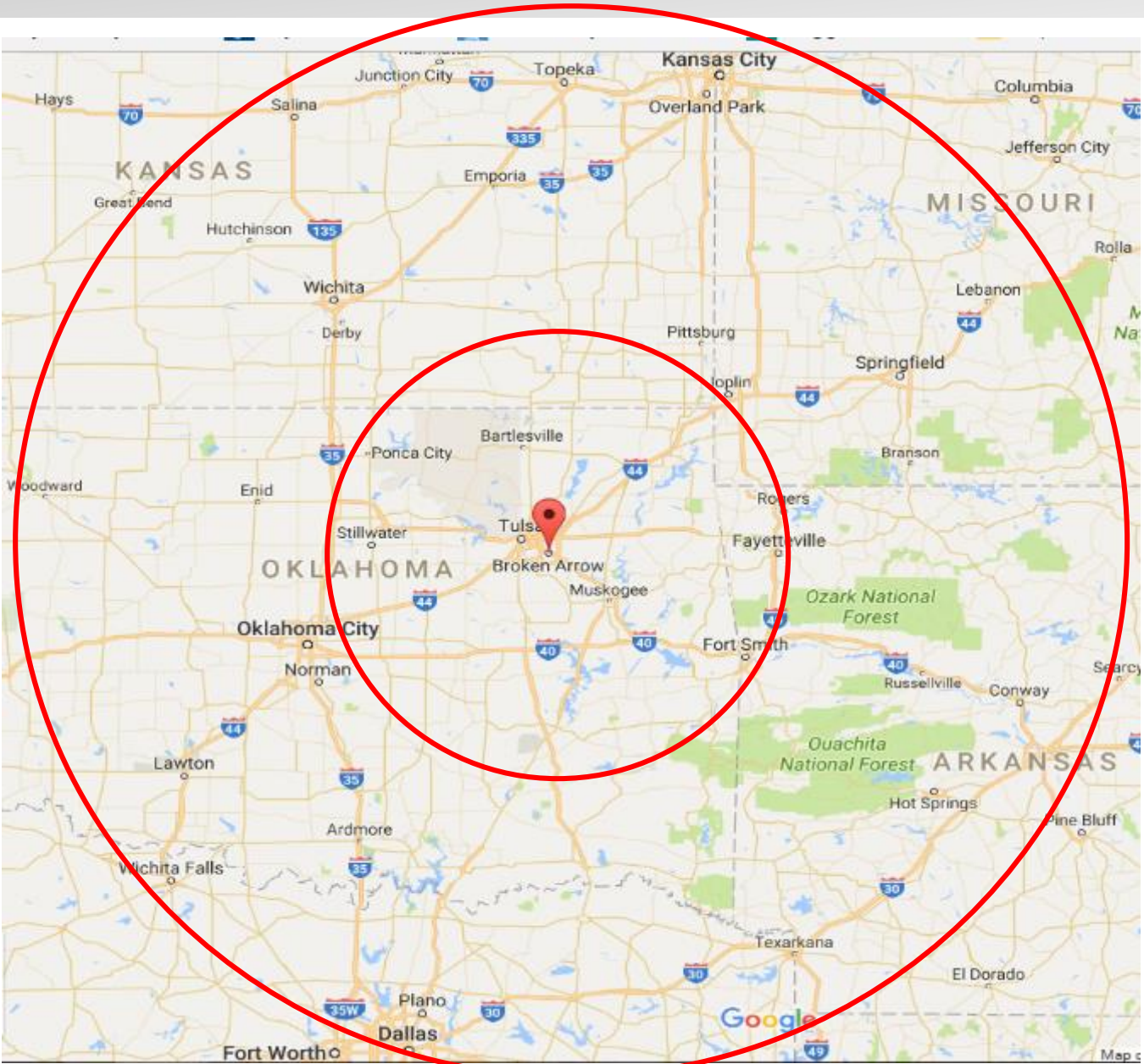
Value of 1% Occupancy	
Broken Arrow Annual Lodging Room Inventory	285,430
1% Occupancy	2,854
Average daily spending per room night (\$303.95)	\$867,473



Map of Broken Arrow:
markets within a 2-5-hour drive

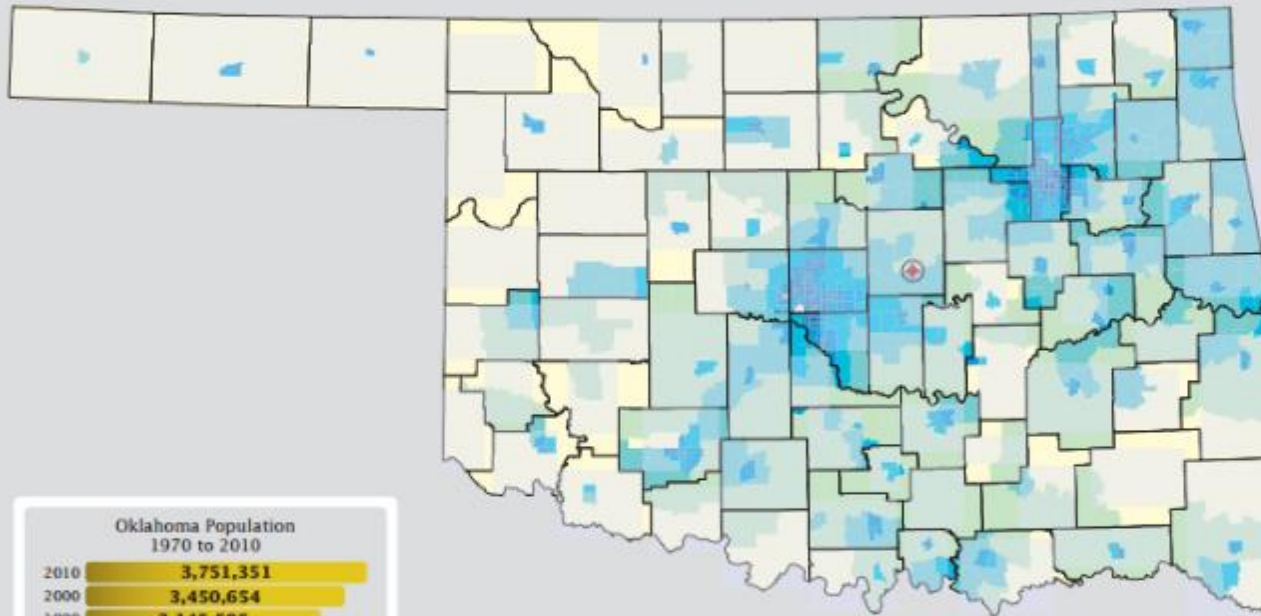
Population by State	2010 Census (millions)
Texas	25.0
Missouri	5.9
Oklahoma	3.7
Kansas	2.9
Arkansas	2.9
TOTAL	40.4

1% of 1% would result
in an additional 4,040
room nights sold!

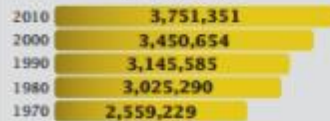


2010 Census: Oklahoma Profile

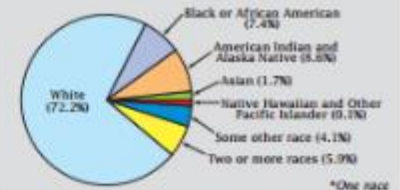
Population Density by Census Tract



Oklahoma Population
1970 to 2010



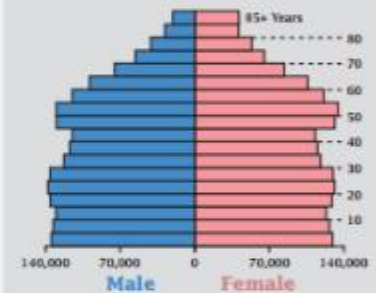
State Race* Breakdown



Hispanic or Latino (of any race)
makes up **8.9%** of the state population.

Population by Sex and Age

Total Population: 3,751,351



Housing Tenure

Total Occupied Housing Units:
1,460,450



People per Square Mile by Census Tract



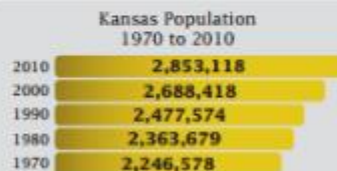
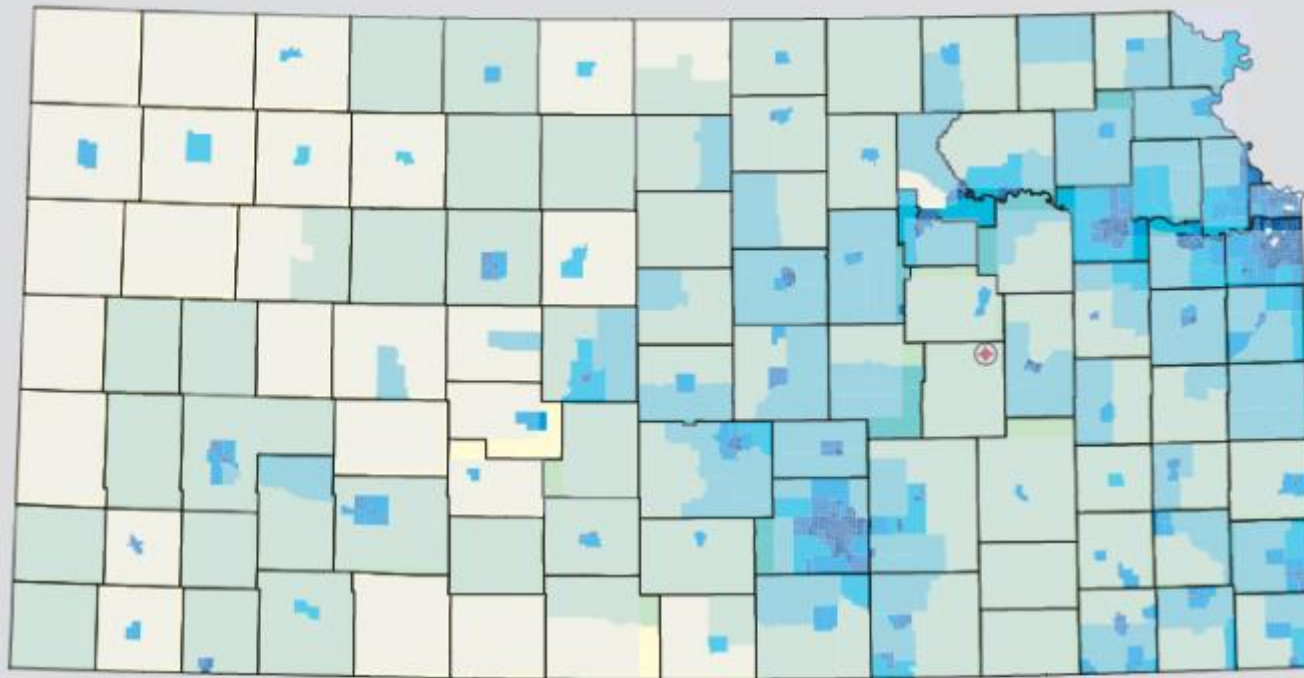
County Boundary

Oklahoma Mean Center of Population

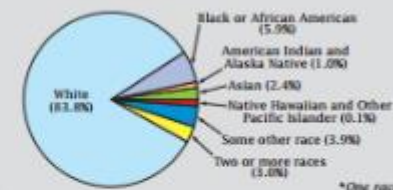


2010 Census: Kansas Profile

Population Density by Census Tract

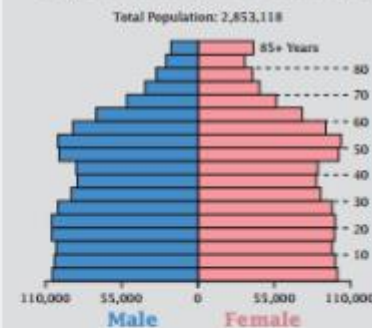


State Race* Breakdown



Hispanic or Latino (of any race) makes up **10.5%** of the state population.

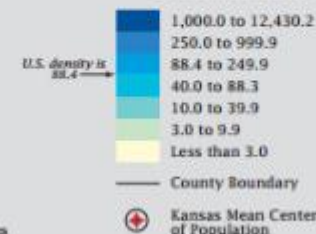
Population by Sex and Age



Housing Tenure

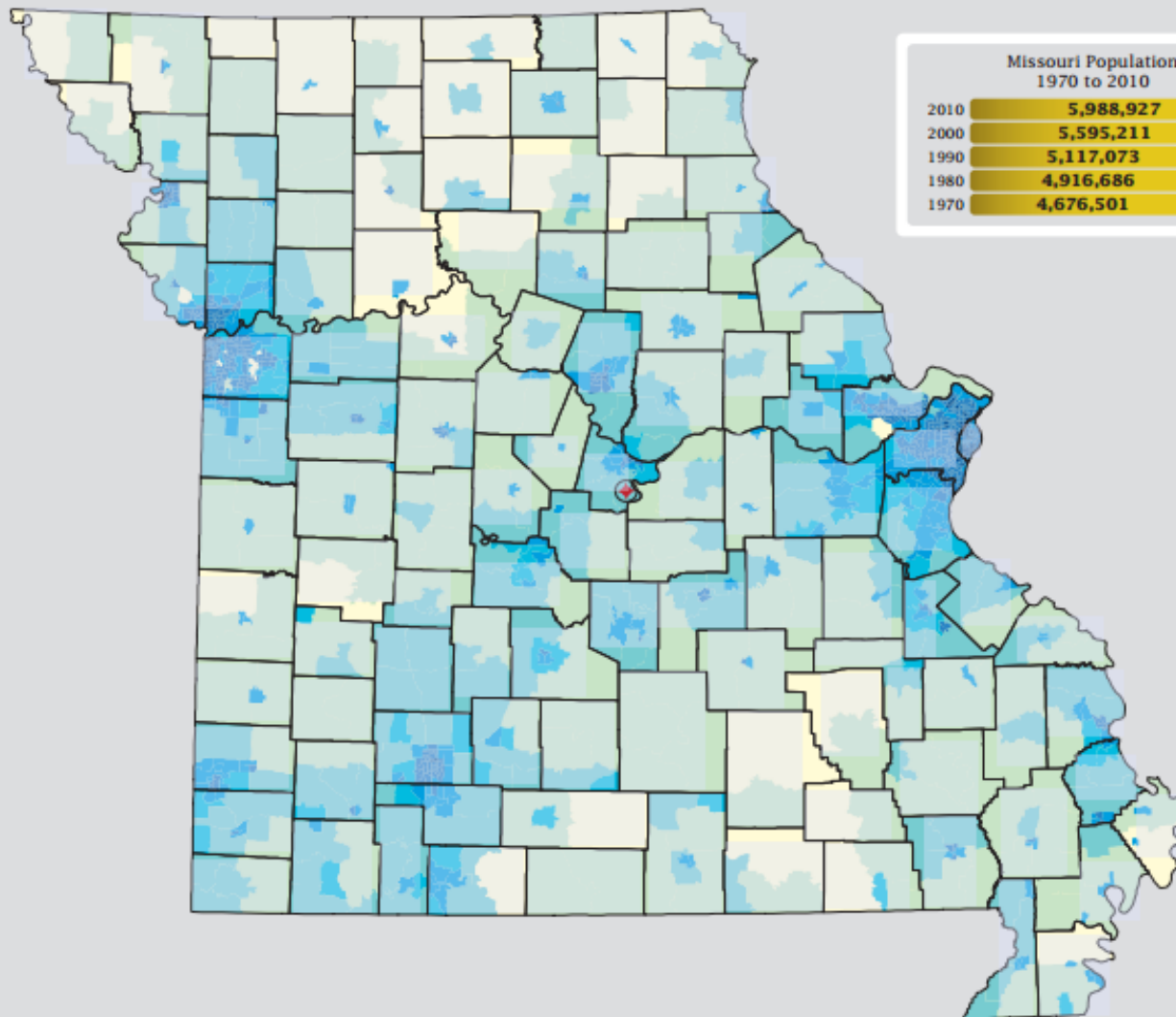


People per Square Mile by Census Tract



2010 Census: Missouri Profile

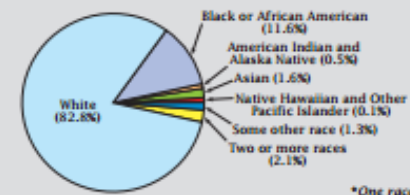
Population Density by Census Tract



Missouri Population 1970 to 2010

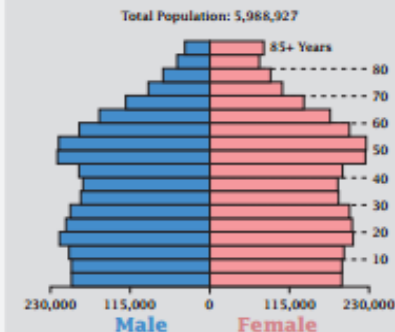
2010	5,988,927
2000	5,595,211
1990	5,117,073
1980	4,916,686
1970	4,676,501

State Race* Breakdown



Hispanic or Latino (of any race)
makes up **3.5%** of the state population.

Population by Sex and Age

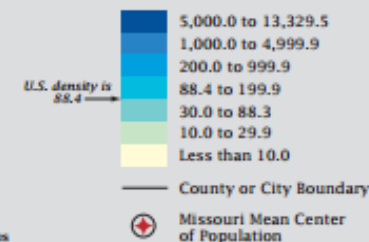


Housing Tenure

Total Occupied Housing Units:
2,375,611

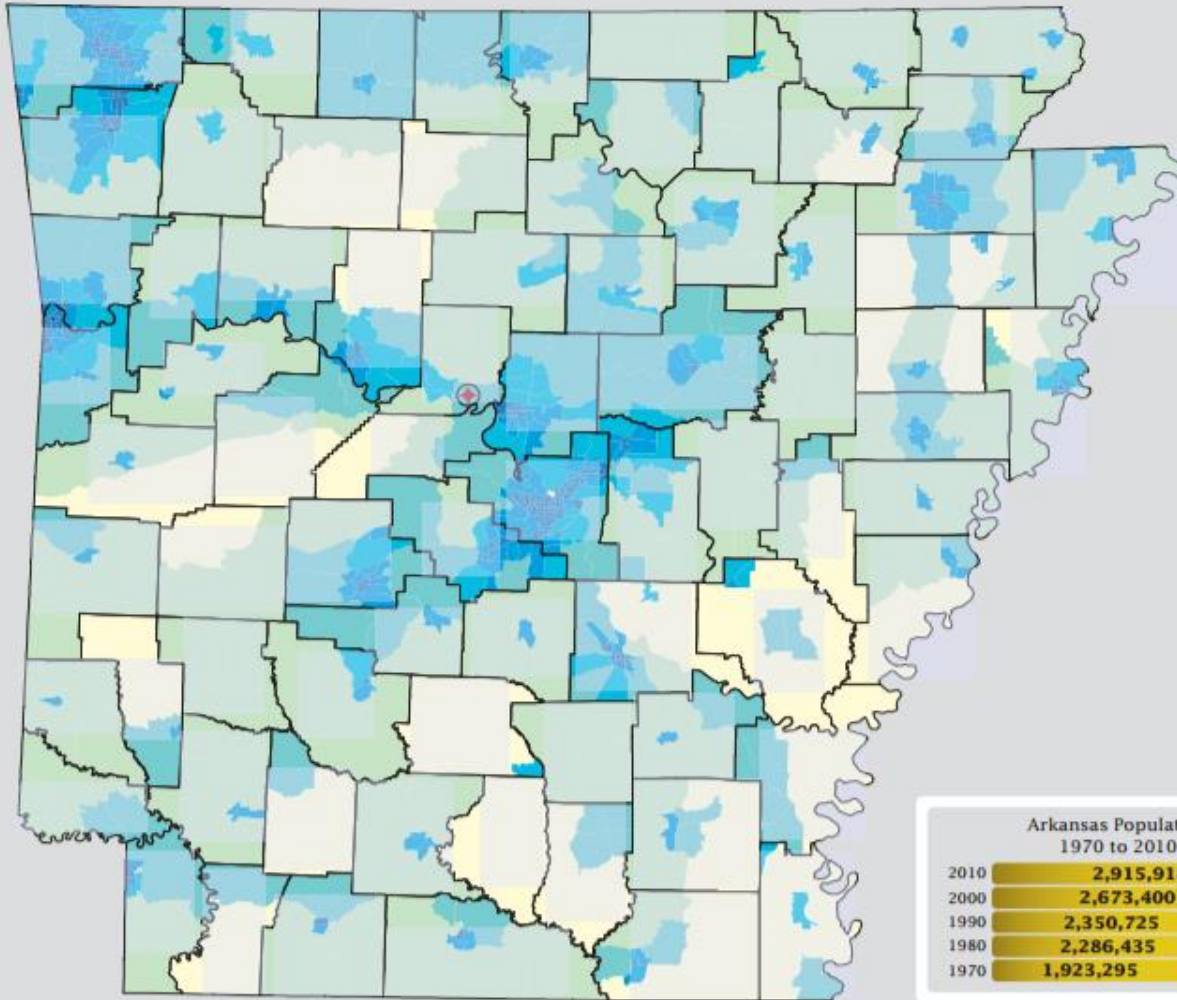
68.8% Owner Occupied	31.2% Renter Occupied
Average Household Size of Owner-Occupied Units: 2.54 people	Average Household Size of Renter-Occupied Units: 2.25 people

People per Square Mile by Census Tract



2010 Census: Arkansas Profile

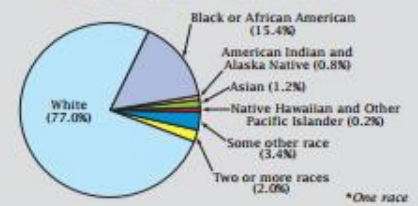
Population Density by Census Tract



Arkansas Population 1970 to 2010

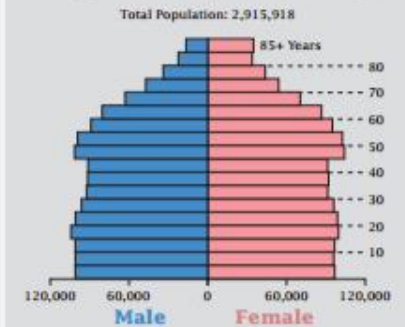


State Race* Breakdown

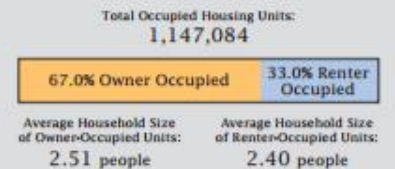


Hispanic or Latino (of any race) makes up **6.4%** of the state population.

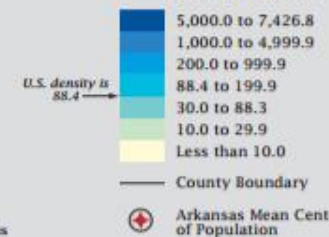
Population by Sex and Age



Housing Tenure

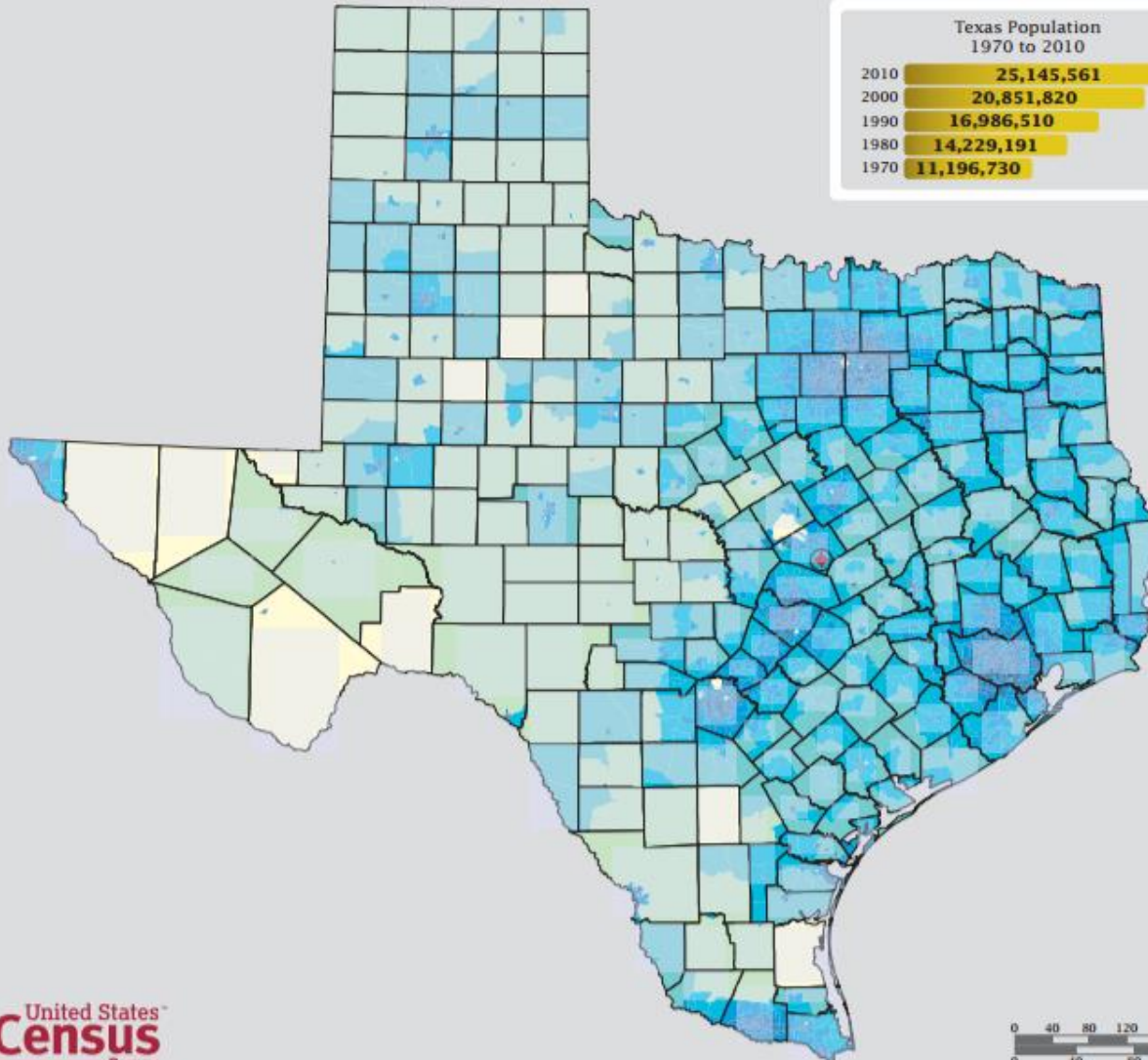


People per Square Mile by Census Tract



2010 Census: Texas Profile

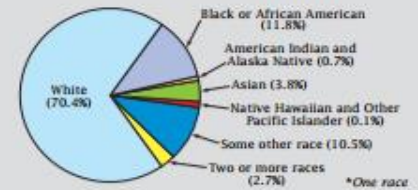
Population Density by Census Tract



Texas Population 1970 to 2010

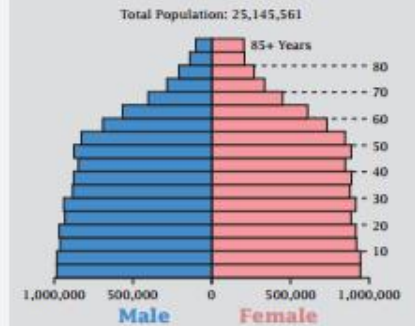
2010	25,145,561
2000	20,851,820
1990	16,986,510
1980	14,229,191
1970	11,196,730

State Race* Breakdown

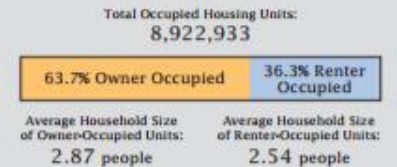


Hispanic or Latino (of any race) makes up **37.6%** of the state population.

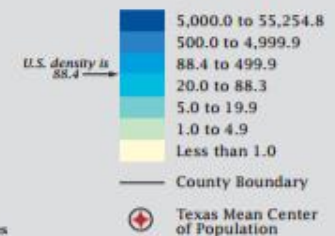
Population by Sex and Age



Housing Tenure



People per Square Mile by Census Tract





**Young Strategies, Inc.
Destination Services, LLC.
Research Team Experience**



Young Strategies, Inc. (YS) and Destination Services (DS) are research and planning firms focusing on destination marketing organizations and travel destinations. The principal members of this project team have conducted research and strategic planning with over 150 DMOs in twenty-seven states. YS/DS's approach is to custom tailor each research study to the specific needs of the destination. YS & DS are small boutique firms that develop a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

Berkeley W. Young, President - Project Team Leader

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

Stephen L. Powell, President – Destination Services

30 years of experience in marketing, tourism product development, destination branding and management, budgeting and research. With experience at the local, state and federal levels of government, he brings a wealth of political experience, techniques for public support and political advocacy to the project. As the former Director of the St. Charles Missouri, Convention and Visitors Bureau, his efforts moved the destination from a day trip market to a full service year round destination which involved the development of seventeen attractions including a 152,000 square foot convention center and a casino. During his tenure as the CEO for the Peoria, Illinois, Convention and Visitors Bureau, Powell reorganized the Bureau into a more focused regional sales organization and as a result, increased booked business by 40%. Currently, Powell works with both public and private entities to develop destinations and solve complex issues related to the overall management of the destination. His specialty is marketing, strategic planning, product and attraction development, destination branding, sales, research and political strategy.

Amy Stevens, Vice President, Young Strategies

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

Larry Gustke, PhD - Destination Analytics

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.



**Addendum:
Verbatim Responses to Survey
Questions of Respondents
Overnight**



Please review the following list then tell us if each INSPIRED and/or were used for TRIP PLANNING purposes for your most recent trip to Broken Arrow, Oklahoma.

Other:

- ASA National and College Exposure Fastpitch Tournaments
- ASA Softball
- Come for ASA Tournaments and High School Tournaments at Arrowhead Park all the time
- Come up there 4 times a year for softball
- Company sales meeting
- Family lives in Bixby, I used to live in Broken Arrow
- Friends for camping
- Harley Davidson Trip Planner
- Online search
- Softball National event
- Softball tournaments (2)
- Sports events (2)
- Tournament Site: BASCO
- Tulsaworld.com

How did you use the following social media sites or applications as part of your travel to Broken Arrow, Oklahoma?

Other:

- Softball
- Hotels.com

Which of the following best describes the people who came with you on this visit to Broken Arrow, Oklahoma?

Other:

- ASA Softball

Regarding your LEISURE trip to Broken Arrow, Oklahoma, what was the SPECIFIC reason for your trip?

Other:

- Camping trip
- Dance competition
- Did Tulsa Tough and visited friends in Broken Arrow
- Motorcycle trip to 3 places in Oklahoma
- Sight see
- Use to live in Broken Arrow
- Wedding

What was the total number of people in your travel party?

If 10 or more please specify exact number:

- Whole softball team
- 12
- 14
- 18
- 20
- 25 (2)
- 30
- 32
- 40 (5)
- 50
- 75

What PRIMARY mode of transportation did you use TO TRAVEL TO Broken Arrow, Oklahoma on your most recent visit?

If you flew, at which airport did you arrive?

- BA International
- Oklahoma City
- Tulsa
- Tulsa & OK City
- Tulsa airport

Annually, how many times do you typically visit Broken Arrow, Oklahoma?

Other:

- 2nd time

How many nights did you stay in Broken Arrow, Oklahoma on your most recent visit?

If you stayed 11 or more, please specify number of nights:

- 31

Where did you stay during your last visit to Broken Arrow, Oklahoma? (please select one)

Please specify the name of your accommodation:

- Castle Wood Suites
- Chain Hotel. Hampton Or Holiday Inn
- Clarion Hotel
- Days Inn
- Holiday Inn (2)
- Holiday Inn Express
- Holiday Inn Express & Town Suites
- Holiday Inn Express Bass Pro
- Quality Inn
- State Park Cabin
- Wyndam

Please identify the hotel/motel where you stayed on the LAST visit to Broken Arrow, Oklahoma. (Choose ONE from the list below.)

If the property you stayed is not in the list above, please enter it here:

- Hilton Garden Inn
- I don't remember
- Wyndam

Check all ACTIVITIES you or a member of your travel party did while visiting Broken Arrow, Oklahoma. (Check ALL that apply)

Other:

- Andolini's Restaurant
- Escape puzzle scenario

Following is a list of specific ATTRACTIONS in Broken Arrow, Oklahoma. Please check ALL that you visited while in Broken Arrow, Oklahoma.

Other:

- Apple farm
- Floated the river

Did you visit any of these TULSA attractions while staying in Broken Arrow, OK?

Other:

- Botanical gardens
- Hard Rock
- The Air and Space Museum

Following is a list of major EVENTS in Broken Arrow, Oklahoma. Please check ALL that you visited while in Broken Arrow, Oklahoma.

Other:

- I've been to Ruts n Guts and it's brilliant
- Missed the state fair :(
- Softball tournament
- Southern Nationals Fastpitch

Considering this visit to Broken Arrow, please rate each of the following amenities using the satisfaction scale provided below.

Other:

- Dining at Andolini's
- Excellent traffic grid layout. Easy to drive.
- My fiancée lives in BA. I visit with her at her home. That's about it.

What is your occupation?

Other:

- Account Manager
- Administrative Assistant
- Coach (2)
- Construction
- Mechanic
- Quality Assurance
- Services
- Social Services
- Sports
- Telecommunications

What types of activities or experiences would inspire you to visit Broken Arrow, Oklahoma? (Please indicate your level of interest. Select one per row)

Other:

- Deep sea fishing
- Hunting and fishing
- Live outdoor theatre
- Looking for women
- Outdoor activities



**Addendum:
Verbatim Responses to Survey
Questions of Respondents
Daytrippers**



Please review the following list then tell us if each INSPIRED and/or were used for TRIP PLANNING purposes for your most recent trip to Broken Arrow, Oklahoma.

Other:

- 1955 class luncheon once a month
- Antique stores on main street
- Antiques!
- B.A. historical society
- Band competition
- Business meeting
- Frequently visit broken arrow restaurants
- Gas stop
- Geocaching
- Group from Methodist manor independent living
- I work in BA
- Just passed through a few times
- Live in east Tulsa right next to BA ok
- Live in neighboring county
- My sons had a football game there.
- None of the above
- Oklahoma joes and bass pro shop
- Rose district
- Softball tournament (2)
- Was looking for craft shows
- Youth sports

How did you use the following social media sites or applications as part of your travel to Broken Arrow, Oklahoma?(Check ALL that apply)

- ASA/USSSA Websites
- None (5)
- None apply
- None, grew up in Broken Arrow
- Shopping

Regarding your LEISURE trip to Broken Arrow, Oklahoma, what was the SPECIFIC reason for your trip?

Other:

- Attend Lifechurch
- Gas stop
- On my way to and from other cities
- Research
- Revisited area
- Rhema Christmas lights

Visit Broken Arrow

Verbatim Responses – Daytrip Visitor

- ||| -

Which of the following best describes the people who came with you on this visit to Broken Arrow, Oklahoma?

Other:

- Softball team

What was the total number of people in your travel party?

If more than 10, please specify exact number:

- 12
- 25 (2)

Check all ACTIVITIES you or a member of your travel party did while visiting Broken Arrow, Oklahoma.

Other:

- BBQ
- Fuel stop
- Geocaching
- Movie
- Movies (4)
- Movies at Warren Theater
- Rhema Christmas lights

Annually, how many times do you typically visit Broken Arrow, Oklahoma?

Other:

- Every few years

Did you visit any of these TULSA attractions while staying in Broken Arrow, OK?

Other:

- I live in Tulsa
- Keystone Lake

Following is a list of specific ATTRACTIONS in Broken Arrow, Oklahoma.

Other:

- Cafe Savanna, Heritage United Methodist Church to see Stained Glass Windows
- Forest Ridge

Considering this visit to Broken Arrow, please rate each of the following amenities using the satisfaction scale provided below. If you did not participate in any of the activities please check "N/A".(Check one rating for each)

- Addresses in businesses not easily seen, esp. on Main Street and street signage confusing



**Addendum:
Verbatim Responses to Survey
Questions of Respondents
Resident Profile**



When friends, family or business guests visit you, please tell us how often you take them to participate in the following Broken Arrow experiences.

Other:

- All of our "guests" have been local
- Being from Australia they love the atmosphere of downtown.
- Church activities - Frequently
- Downtown and surrounding countryside beauty out of traffic is a must see
- Drive and walk the Rose District
- Farmer's Market during the summer!
- Farmers Market is a frequent destination.
- Go to lake Ft. Gibson
- I had a gift shop on main street spent most time there,
- Metal detecting & rving
- Most outdoor events age preventative
- Religious gatherings, church services and conferences
- Rose District
- Rose District always
- Soccer park
- Swimming.
- The Girl Can Cook classes
- They come in town to volunteer at safaris, and I show them our town.
- They were here for a wedding
- To local church service
- We go to Tulsa for everything.
- We like the parks
- We love attending events at the local museums.
- When the situation and calendar are concurrent, I choose BA

What is your occupation?

Other:

- Advertising
- Aircraft maintenance
- Airline
- Also a Pageant director
- Art teacher retired
- Aviation
- Benefits Insurance Broker
- Community volunteer (2)
- Corporate travel agent
- Cost Estimator/ Energy Industry
- Disabled (2)
- Engineering
- foster care/adoption specialist
- I specialize in Social Media in the Real Estate industry
- Insurance
- IT
- Librarian
- Marketing
- Mental Health Therapist
- Non-profit animal rescue
- Own floral shop on Main Street
- Peon
- Retired
- Stay at home mom
- Stay at home parent and full time student
- Telecommunications

Do you recommend Broken Arrow, Oklahoma as a good place to visit?

Other:

- Actually it's a better place to live and raise children
- All local or regional people should visit Broken Arrow. If a person was from out of state and did not have relatives or business here, it is hard to describe it as a destination spot.
- BA is a great place to live. The wedding had lots of rain and flooding involved. The guests saw mostly the inside of the church building! They did enjoy a meal at Hideaway Pizza.
- Broken Arrow is my home, my community. I think we have an opportunity to produce more National Honor students than Jenks by continued investment in attracting the best educators. Investment in the youth & the community on an intense scale will help keep Broken Arrow (as it continues to grow) from the violence/problems that plagues other communities. As we grow, draw in new business opportunities, population increases....it's important to maintain our "town and family" values. It is possible to balance both proactively.
- Don't like what they are doing to the farmers market, why do we need a large fountain there. Don't like what they have done to the parking and now they are messing it up again, you expect the handicap to walk two blocks to town. That isn't going to happen
- Don't particularly see BA as a destination. Tulsa is the destination
- Downtown is coming along but still a lot to do...I enjoy it...but hope the growth continues. I'm rooting for BA to continue to change, it's good so far.
- Easy to get around. We have movies, bowling good restaurants and some nice night spots
- Frustrating that main streets have 2 names
- Good place to visit but not business friendly
- Great place to live but limited attractions for someone without a family connection.
- Great place to live!
- Growing community, community involvement, cultural
- However, there are very few retail shopping
- I always recommend BA to buyers that are moving here from out of state.
- I am so proud to see what BA has become over the past 60 years
- I enjoy living in Broken Arrow.
- I really like how the city has refurbished Main street-Rose district yet kept it historical looking. My dad and my grandmother at one time actually lived upstairs in one of the buildings on Main Street!! I like the small town feel and the countryside also.
- I have taken a group around town and always recommend our museums, restaurants, and bookstore.
- I love Broken Arrow! (2)
- I love the community feel in Broken Arrow.
- I love the constant growth on Main
- I love the revitalization of the Rose District and recommend it often.

Do you recommend Broken Arrow, Oklahoma as a good place to visit?

Other: **(CONTINUED)**

- I was raised in the suburbs of Chicago....we went to the "big" city to do sightseeing, museums, and eat at specialty restaurants. In Broken Arrow, when I have guests, we usually go to Tulsa to do the same things as in Chicago. I love Broken Arrow to live, but not a place to go "visit".
- I wouldn't call it a tourist attraction, but there are some fun things to do on Main Street.
- If we had a hotel or bnbs downtown, I think that would be really cool.
- In general, not really, there are not enough tourist attractions yet. It's a great place to live, though.
- It is too small to have much to do especially for the youth.
- It would be great if BA would all the rental properties and the few business that back up or sit on Elm, from Kenosha to Broadway. It needs to be cleaned up. We also need a nice decorative fence around the park behind Quik-Trip at Kenosha. I have had friends and family ask me why the city didn't buy the homes when Elm was widen?
- It's a good place to live, but there's nothing for visitors.
- It's definitely gotten better over the years. Downtown BA is becoming a destination with the restaurants and newer shopping (No offense to any of the old antique stores). For instance, a group of us went to The Rooftop last night and played trivia and downtown was full on a Thursday.
- It's definitely not a destination to visit if you don't have business or family in the area. Not enough attractions.
- I've come to love my adopted town and recommend it to everyone who asks. I implore them to spend their nights here instead of in surrounding towns and to be sure to check out the gorgeous downtown area with its beautiful mix of old and new. The shopkeepers are welcoming and friendly and the cultural spaces like the museums and PAC are excellent venues that add a lot of value to the community. I've really fallen in love with this town and its unique blend of "big city" and "small town" all rolled into one.
- Love Broken Arrow. As a realtor I always tell clients it's the best kept secret. Very up and coming. Great schools.
- Most of our visitors visit because of family here, not an attraction to BA
- My Brother and wife come here first from Australia to rest from the large trip. Stated they love Broken Arrow!
- No accommodations for rvs. No campsites. No dump station. No civic center with above mentioned.
- Not a lot to do. Maybe some of the shops to visit but that's it.
- Not certain, can't say yes or no.
- Not much as far as visiting, But a good place to live
- Nothing really to do here
- Overall a great place to stay, nice accommodations and wide choice of eating establishments of all types of food.
- Small town feel

Do you recommend Broken Arrow, Oklahoma as a good place to visit?

Other: **(CONTINUED)**

- The museum we have is relatively boring after about the first 15 mins and I would not go more than once. My 8 and 15 yr old were bored after 5 min and kept asking "is there more than just these two rooms?" The stores on Main St are SLOWLY coming around but it took them a long time to look OPEN. Hatfield's, Magnolias are great examples of stores that spill out onto the street, welcoming visitors to come inside or window shop if they are closed. I am glad that some of them are now open on Mondays but there needs to be huge marketing around that. BA folks have been trained to go to Tulsa on Monday if they want to shop so it will take a while to retrain. Speaking of marketing, what is with "late Thursday's"? Is it a thing? Is everyone on board? Does anyone know about it? Besides a tired one sided banner hidden a mile away from the stores, is there any advertising? Has anyone considered a commercial for Main St featuring and rotating merchants? Having visited during a street festival recently, several of the stores did not even acknowledge the fact that there were thousands of people invited to their door step. No festival themed windows, no clothing racks on sidewalk, no sidewalk sales, a simple table with coupons/flyers/balloons etc. When a small town has a festival, the store owners typically go "all out" with promos, sales, decor etc and "all in" with the festival managers to see where they can help draw folks to Main St. I did not see any of that for either festival. As far a child activities outside of some parks and two pools, unfortunately we have little to offer and on the chance that we do have something to offer, no one knows about it. As far as teen activities, we literally have nothing. I love this city and can't wait to see where we are in 5 years. I hope we focus more on bringing big businesses here and retaining the ones that we have. I see several areas suffering on Elm, South of 101st, where many businesses are moving, closing or not building at all. With the hub being at 71st/Lynn Lane, it seems like we could push some of the love (and the traffic!) Down Elm. I love my city. I love to see it grow and the successes that come with it. I scream inside when someone I know drives the short 10 miles from Tulsa to Main St BA and says "I did not know this was here". Everyone should know about our little gem of a city. We have a lot to be proud of.
- We enjoy living here and will stay.
- We live halfway between BA and Catoosa. After we moved here, we decided that BA would be "our town." We love strolling down Main Street, having a cocktail at one of the restaurants, and browsing through the stores. We enjoy the Main Street events and have been to several, including Lights On, Chalk It Up, local parades, BA Neighbors events, and the Farmer's Market.
- We love our community
- Would like to reopen my business in BA again.

What types of activities or experiences would inspire you to visit Broken Arrow, Oklahoma?

- A club with live music would be a wonderful night out.
- A concert venue like BOK but on a smaller scale. More tennis courts.
- Being able to dine, walk outside, listen to music
- Bigger variety of downtown restaurants
- Bike trails around town
- Bike trails with gravel (no asphalt.)
- Blue Grass Festivals
- Breweries or brew pubs
- Brewery or taphouse with a lot of different draft beer choices
- Brewery!
- Ceramic making
- Children's Museum
- Children's museum; "glamping" experience; theme park
- Concerts, music venues
- Conferences at churches, Zoo, Museum
- Continued building up downtown area...a place to go and be...with family.
- Crafters market
- Department store shopping , Broken arrow shopping mall
- Different kinds of shops then we are getting.
- Do not apply as we live here
- Dog Park
- Dog Park - City of Broken Arrow needs one like Hunter Park in Tulsa - I am there 5 times a week.
- Family friendly activities
- Genealogy library
- Good/unique events and/or festivals
- I would love to have an outlet mall in the area. And a large theme park.
- I'd love to see the Festival Park built out, especially with trees! We have Ray Harral Nature Park, but a mix of spaces to play and nature would be good. Check out Sharon Woods Park in Sharonville, OH. In regards to the arcade, I'd love to see something along the lines of maxretropub. I'm hesitant to have big building places like Incredible Pizza or Main Event come in. Just like dealers (hello Jim Norton Chevy on Aspen), those are hard to fill sometimes.
- Improve terrible seating at BAPAC and we would start bringing friends to attend
- Indoor Rock Climbing

What types of activities or experiences would inspire you to visit Broken Arrow, Oklahoma? (CONTINUED)

- Kid-friendly family activities
- Kids activities, biking, family walk trails, workout classes like kickboxing, workouts with families, lots of family activities to stay off screen time, more announcements of activities
- Live music
- Major retail shopping
- Many are great ideas for residents, culture, raising families here, but how touristy is the goal??
- Mini Expo Center
- Mini golf courses, amusement park
- More adult venues with live music. More adult live stage plays
- More dining, more music venues i.e. Jazz
- More farmers markets, historic tours
- More frequent offerings of bus tours through historic areas of BA. I went to one once about 3 years ago, and haven't seen one offered since then. It was so interesting and I would like to go again, or to take our family members when they visit BA.
- More variety of shopping and entertainment
- Most of the Main Street retail businesses appeal to women generally, and middle-aged to older specifically.
- Museum; genealogy research; city tour; art exhibits
- Museums and the Warren Theater and the chocolate shop
- Music in the park
- Outdoor concert venue
- Outdoor music offerings & activities
- Places to hike without peoples dogs or bikes or motorized whatever. A place for outdoor photography where nature still looks like nature.
- RV camping. Antiques. Swap meets
- Shopping
- Small cafe regular food not pricey outlandish preparations
- Something different like Unlock Tulsa.
- Something more like the Farmers' Market.
- Spiritual fairs and events
- Sporting events, community activities like picnics, parades, etc
- Torchy's Tacos, ifly - indoor skydiving, good Seafood restaurants, Flow Rider Surf Simulator, Sur La Table and cooking classes
- Unique mom & pop shops
- Unique shopping. National brand retailers not otherwise nearby.
- Volunteering at Safaris

What types of activities or experiences would inspire you to visit Broken Arrow, Oklahoma? (CONTINUED)

- Walk for cancer and special need events, charity events, more musical theater, community service opportunities for the kids to give back
- Walking trail like Ray Harrel Nature Center
- We need restaurants and shopping on the south side of Broken Arrow around the Warren Theatre.
- With bikes, more bicycle and pedestrian infrastructure between parts of town (like from our neighborhood to downtown).
- Year-round farmers market.
- YMCA, Community park with walking/biking trails, outdoor venue/stage/amphitheater, indoor community pool, focus on the appeal of those businesses 1/2 mile before and after Rose District. All the "pretty stuff" stops pretty abruptly and it is all too obvious

What is your level of education?

Other:

- 42 credits above college degree
- Associate Degree
- Bible College
- Life
- Petroleum Engineer, MBA