

2024

Economic Impact of Visitors to McCurtain County, Oklahoma



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Introduction

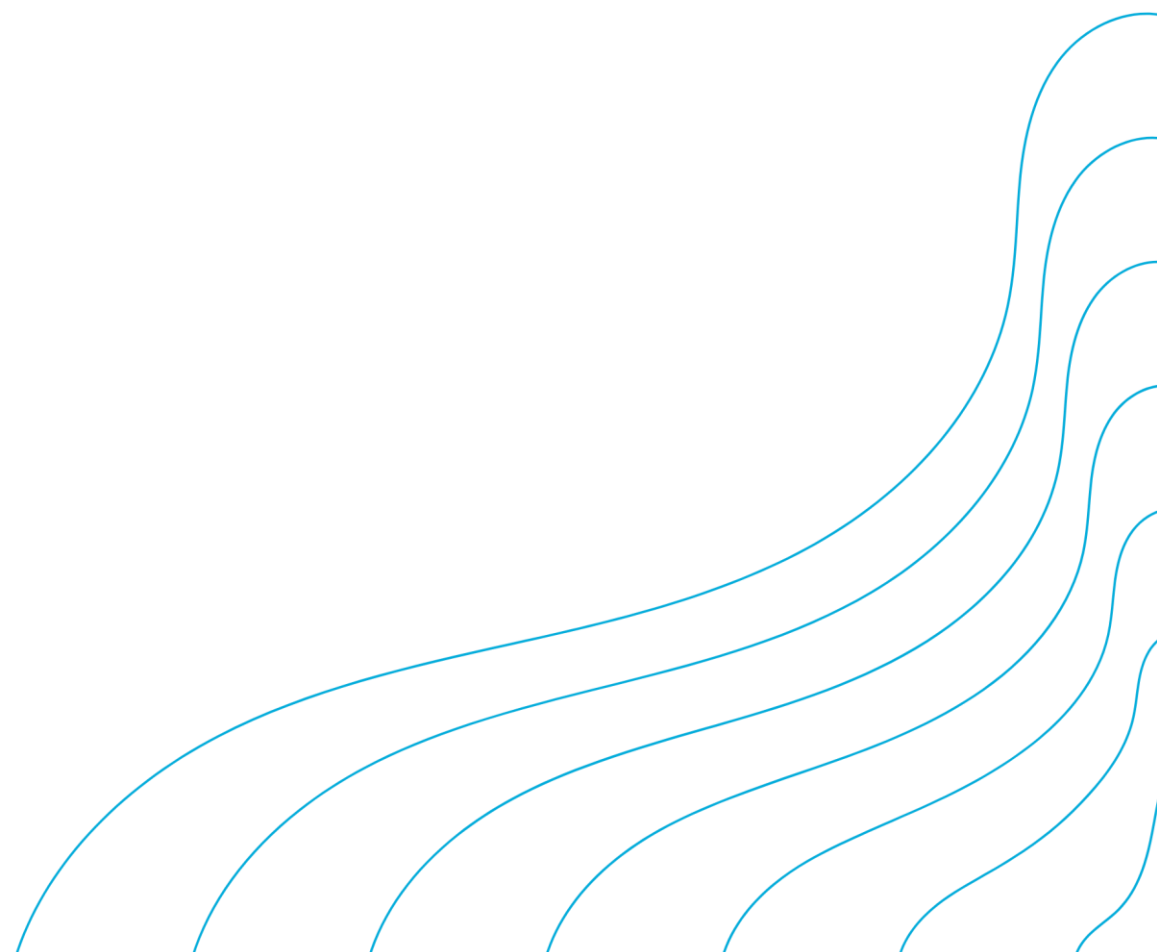
Visitors are integral to McCurtain County's economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of McCurtain County's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

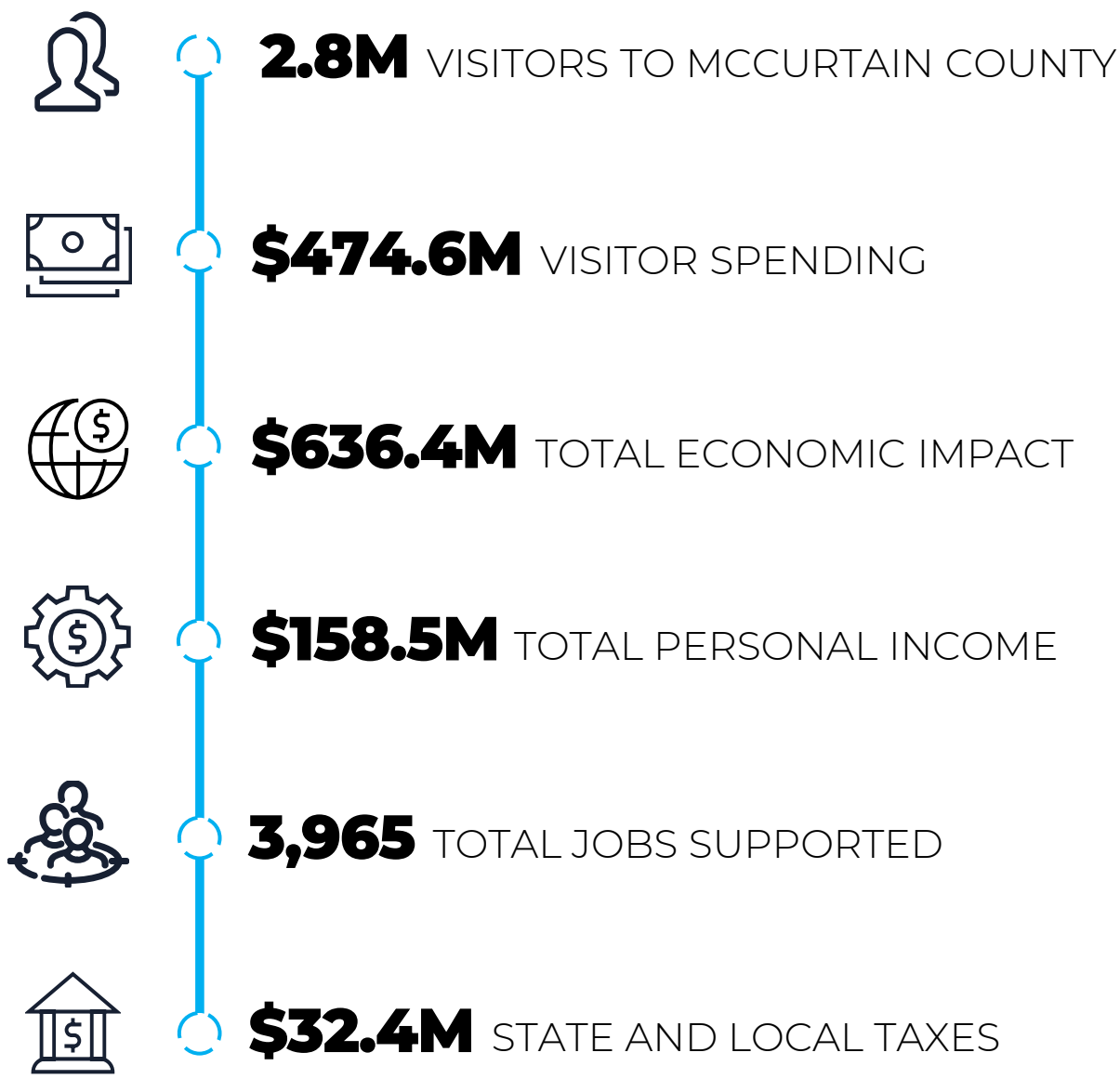
KEY FINDINGS



Key Findings

Visitors Generate Significant Economic Impact

In 2024, 2.8 million visitors spent \$474.6 million in the McCurtain County economy. Visitor spending generated a total economic impact of \$636.4 million.



Results in Context

The visitor economy is an economic pillar in McCurtain County. In 2024, visitor spending supported one-in-5 jobs in McCurtain County. In addition:



\$474.6M VISITOR SPENDING

Visitors spent \$1.3 million per day in McCurtain County, on average.



\$158.5M PERSONAL INCOME

This is the equivalent of \$14,026 per resident household, regardless of any connection to the visitor economy.



3,965 JOBS

The visitor economy sustained 22% of all jobs in McCurtain County.

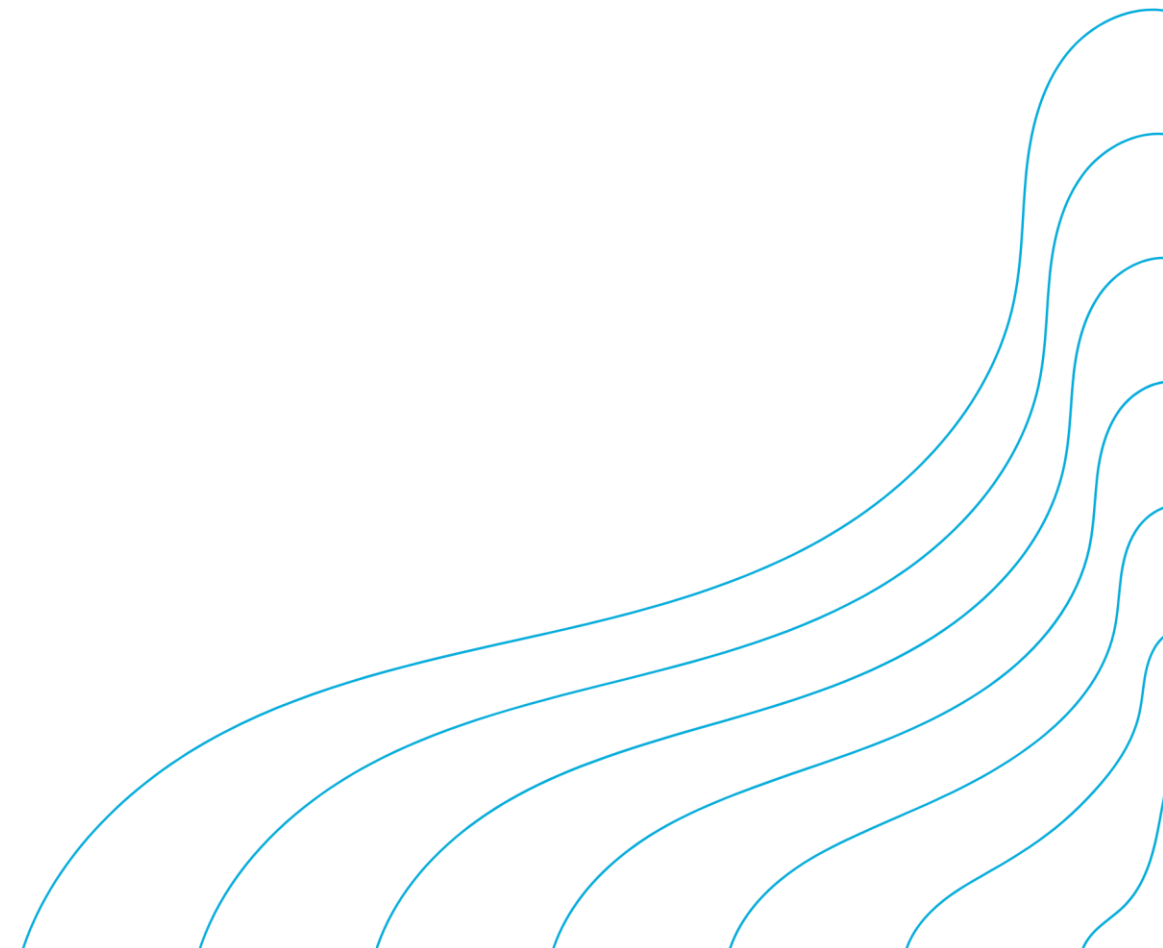


\$32.4M STATE & LOCAL TAXES

Each McCurtain County household would need to be taxed an additional \$2,867 per year to replace the visitor-generated taxes received by state and local governments in 2024.



VISITOR VOLUME & SPENDING



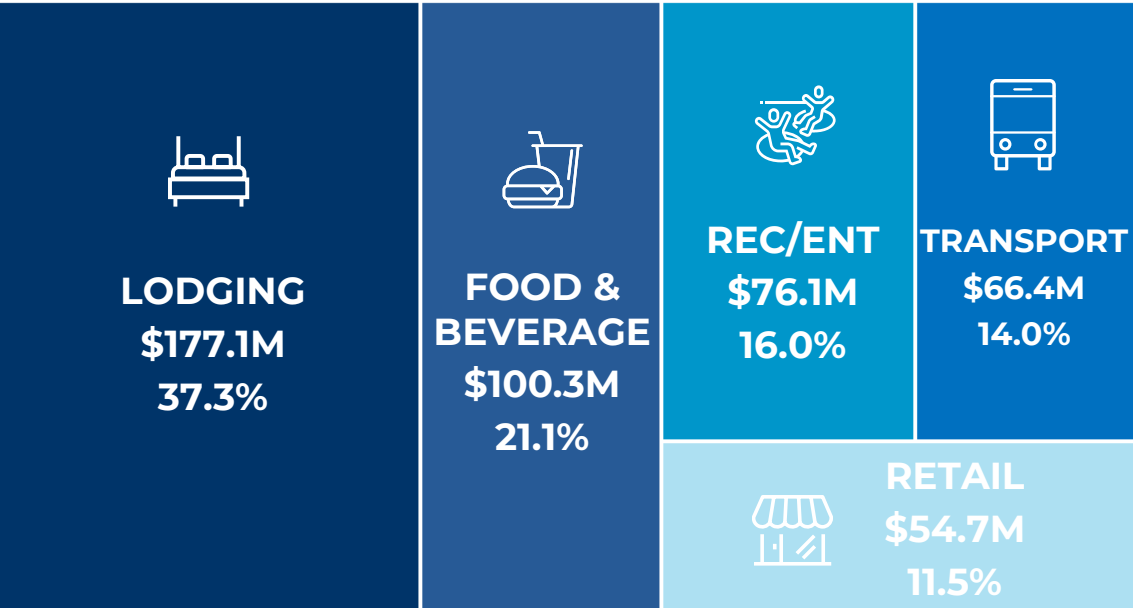
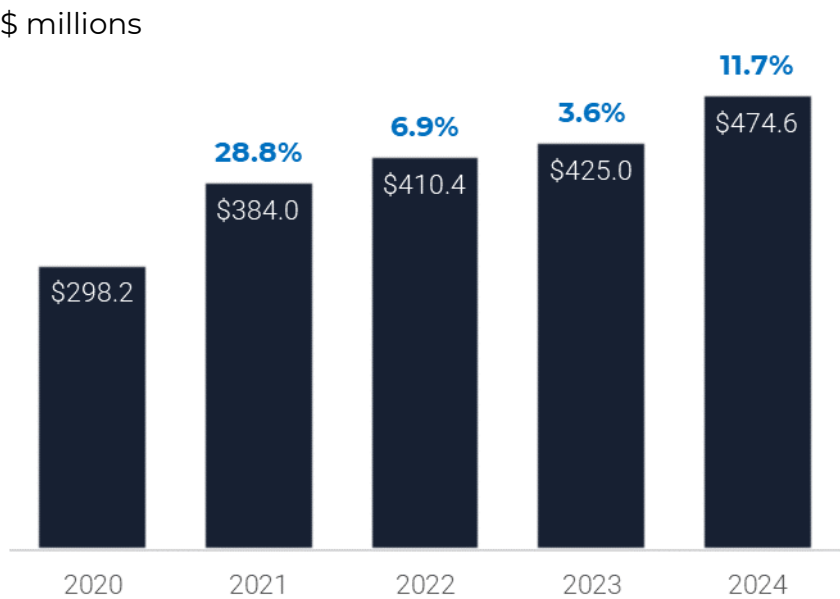
McCurtain County welcomed **2.8 million** visitors who spent **\$474.6 million** in 2024.



Visitor Spending

Visitor spending increased 11.7% in 2024, topping \$474.6 million. Of the \$474.6 million spent, lodging contributed \$177.1 million in sales – representing 37.3% of total direct visitor spending. Food and beverage purchases accounted for 21.1% of total direct visitor spending, while visitors spent 16.0% of their total budget on retail, 14.0% on transportation (including motor fuel), and 11.5% on retail.

McCurtain County Visitor Spending

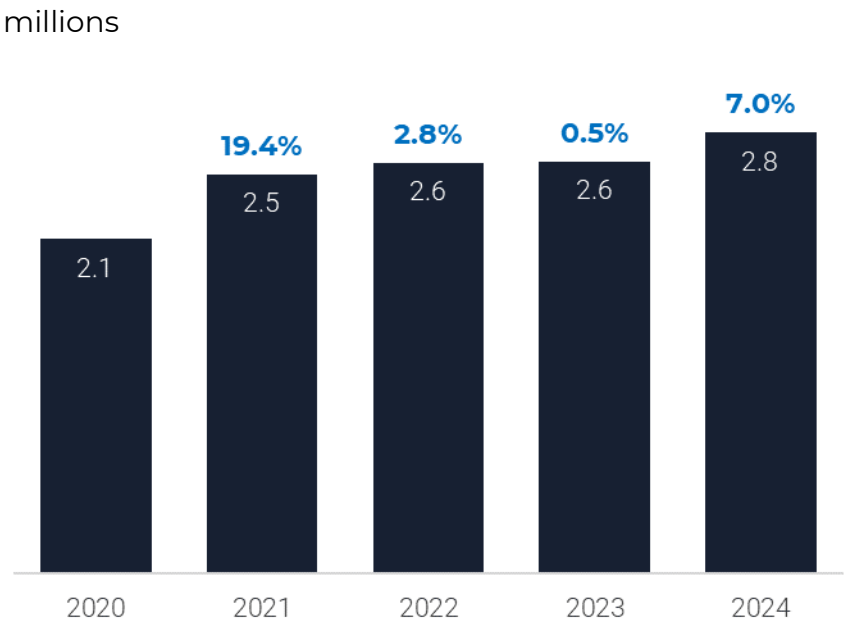


Source: Tourism Economics
Note: Lodging includes all accommodation types.

Visitor Volume

In 2024, 2.8 million visitors traveled to McCurtain County, a strong gain over the prior year (+7.0%). Both day and overnight visitors supported growth, increasing 3.7% and 8.6%, respectively.

McCurtain County Visitor Volume



Source: Tourism Economics

Visitor Volume and Spending Trends

Visitor spending increased 11.7% in 2024, a result of strong demand growth coupled with price increases.

Lodging led spending gains in 2024, increasing 15.1% year-over-year, followed by food and beverage and recreation, which grew 10.8% and 9.8% year-over-year, respectively.

Visitor volumes expanded 7.0% in 2024, led by a strong increase in overnight visitation while experiencing healthy growth in the day segment as well. With demand for cabin rentals rebounding from a slowdown in 2023, overnight visitors accounted for more than 68% of total visitors in 2024, up from 67% in the previous year.

McCurtain County Visitor Spending

\$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total visitor spending	\$298.2	\$384.0	\$410.4	\$425.0	\$474.6	11.7%
Lodging	\$103.1	\$139.3	\$147.3	\$153.9	\$177.1	15.1%
Food & beverage	\$66.2	\$81.2	\$87.2	\$90.6	\$100.3	10.8%
Recreation	\$50.3	\$62.1	\$66.7	\$69.3	\$76.1	9.8%
Fuel and transportation	\$40.2	\$54.7	\$59.8	\$61.0	\$66.4	8.9%
Retail	\$38.3	\$46.8	\$49.4	\$50.2	\$54.7	8.9%

Source: Tourism Economics

Note: Lodging includes all accommodation types.

McCurtain County Visitors, By Segment

millions

	2020	2021	2022	2023	2024	2024 Growth
Total visitors	2.09	2.49	2.56	2.57	2.75	7.0%
Day	0.68	0.76	0.82	0.84	0.87	3.7%
Overnight	1.40	1.73	1.74	1.73	1.88	8.6%

Source: Tourism Economics



ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

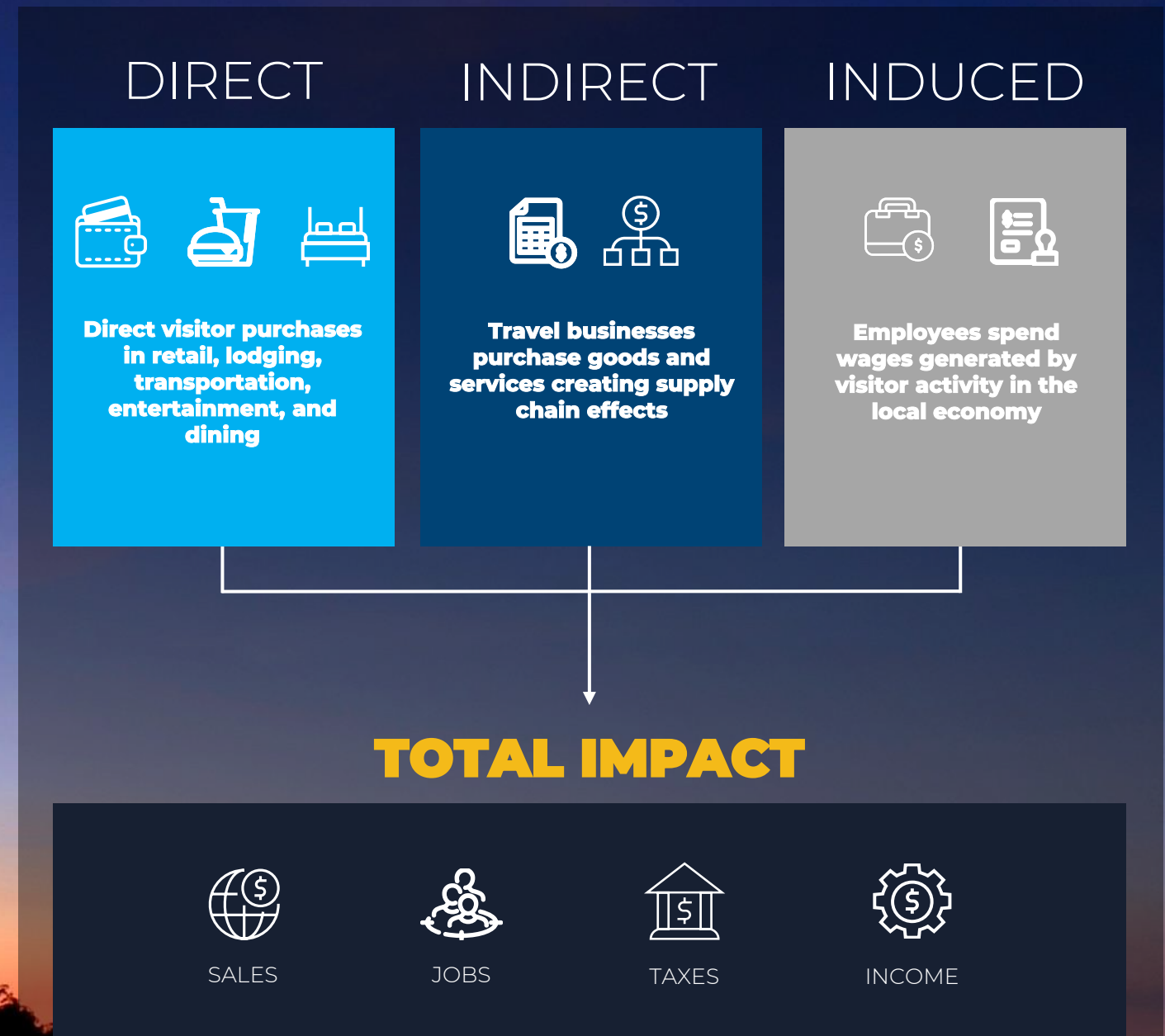
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitor through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Model



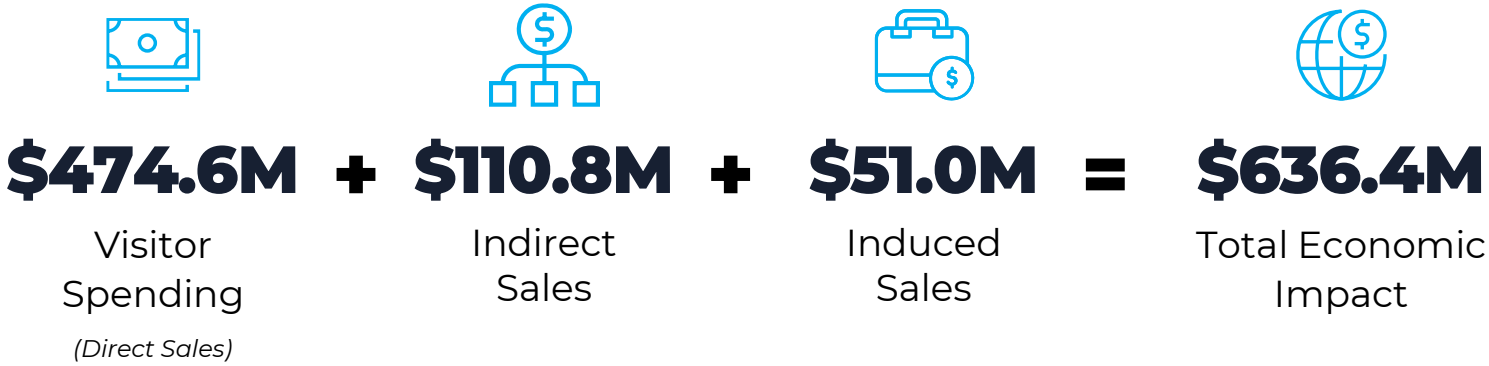
ECONOMIC IMPACT



Business Sales Impacts

Visitors spent \$474.6 million in McCurtain County in 2024. These direct impacts generated an additional \$161.8 million through supply chain (indirect) and income (induced) effects.

As a result, the total economic impact of visitors reached \$636.4 million in 2024.



Business Sales by Industry (2024)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$474.6	\$110.8	\$51.0	\$636.4
Finance, Insurance, Real Estate	\$110.4	\$31.5	\$15.5	\$157.4
Government	\$137.6	\$12.8	\$4.3	\$154.8
Retail Trade	\$67.6	\$1.7	\$7.3	\$76.6
Food & Beverage	\$59.2	\$4.9	\$5.6	\$69.7
Gasoline stations	\$63.1	\$0.0	\$0.6	\$63.8
Business Services		\$24.3	\$2.6	\$26.9
Lodging	\$19.0	\$0.0	\$0.1	\$19.1
Recreation and Entertainment	\$16.9	\$1.0	\$0.6	\$18.5
Construction and Utilities		\$13.4	\$1.6	\$15.0
Communications		\$4.1	\$2.1	\$6.2
Education and Health Care		\$0.0	\$5.3	\$5.3
Wholesale Trade		\$3.7	\$1.5	\$5.3
Personal Services		\$3.6	\$1.3	\$4.9
Other Transport	\$0.7	\$3.1	\$0.8	\$4.6
Manufacturing		\$3.4	\$0.9	\$4.3
Agriculture, Fishing, Mining		\$2.4	\$0.7	\$3.0
Air Transport		\$0.7	\$0.3	\$1.0

Source: Tourism Economics

Visitor spending generated a total economic impact of **\$636.4 million.**



Direct Employment

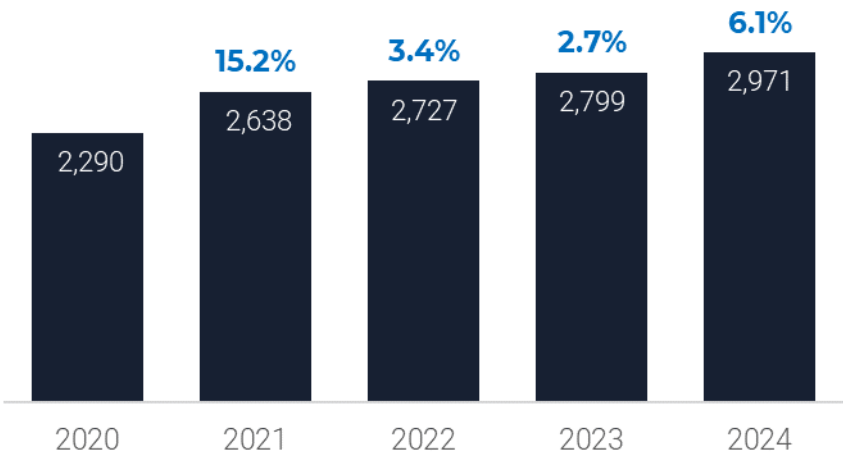
Employment directly supported by visitor activity increased 6.1% in 2024, reaching 2,971 jobs.

Visitor-supported employment is a significant part of several industries in McCurtain County—nearly all lodging employment, 73% of recreation employment, and 52% of food and beverage jobs are supported by visitor spending.

Overall, direct tourism jobs accounted for about 16% of all jobs in McCurtain County in 2024.

Visitor-Supported Employment in McCurtain County

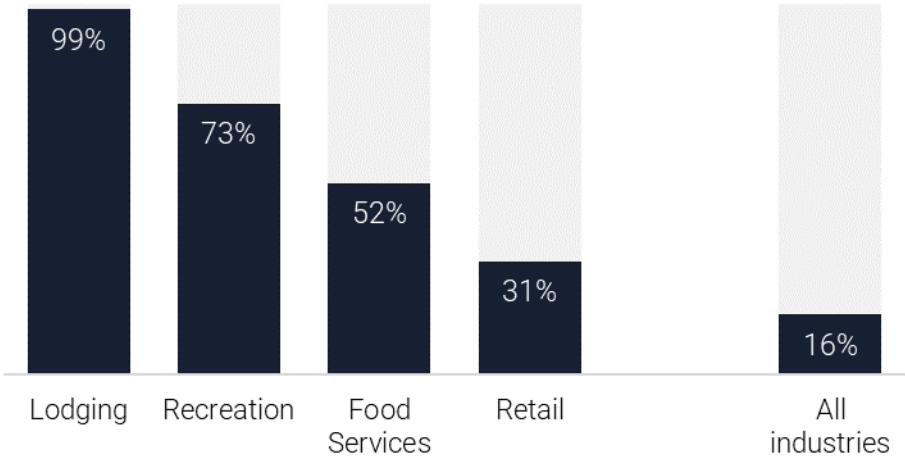
jobs



Source: Tourism Economics

Tourism Employment Intensity

share of total industry employment



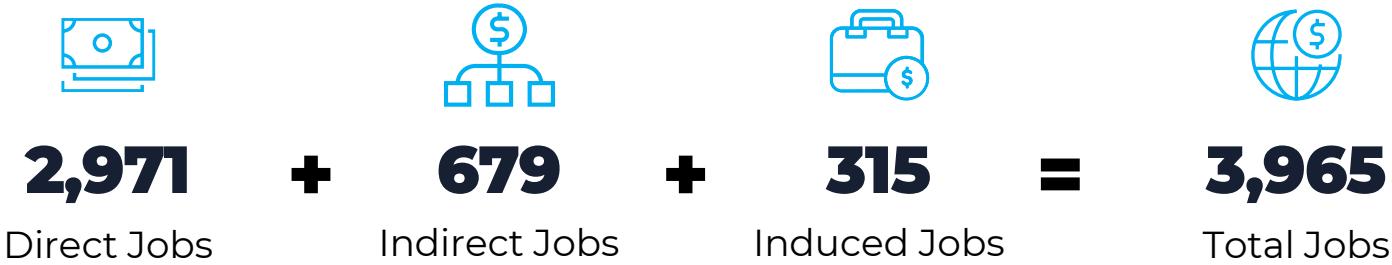
Source: Tourism Economics



The visitor economy in **McCurtain County** directly supported **2,971 local jobs**.

Employment Impacts

Visitor activity sustained 2,971 direct jobs in 2024, with an additional 994 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 3,965 in 2024, translating to one-in-five jobs in the county.



Employment by Industry (2024)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	2,971	679	315	3,965
Retail Trade	696	14	78	788
Food & Beverage	638	57	60	755
Finance, Insurance, Real Estate	455	149	30	634
Gasoline stations	523	0	5	528
Government	322	39	14	376
Business Services		262	28	291
Lodging	170	0	1	170
Recreation and Entertainment	149	8	6	163
Construction and Utilities		59	4	63
Education and Health Care		1	56	57
Personal Services		35	16	50
Other Transport	19	19	4	43
Wholesale Trade		12	4	17
Communications		10	4	14
Agriculture, Fishing, Mining		6	3	9
Manufacturing		6	1	7
Air Transport		1	0	2

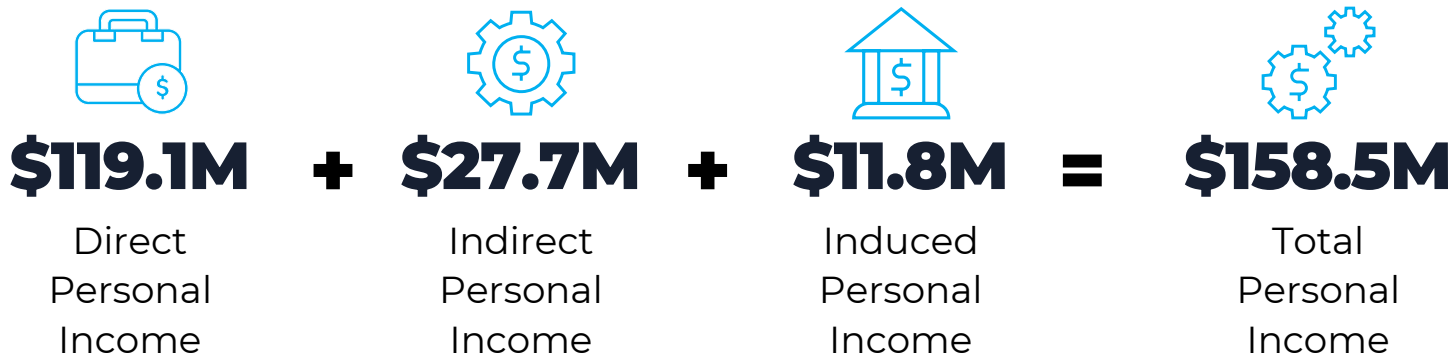
Source: Tourism Economics

The visitor economy supported **one-in-five jobs** in McCurtain County, including nearly 800 jobs in the retail industry.



Personal Income Impacts

Visitor activity generated \$119.1 million in direct personal income in 2024. Including indirect and induced impacts, employees received \$158.5 million in personal income.



Personal Income by Industry (2024)

\$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$119.1	\$27.7	\$11.8	\$158.5
Finance, Insurance, Real Estate	\$27.1	\$7.5	\$1.1	\$35.8
Retail Trade	\$25.6	\$0.6	\$2.6	\$28.7
Government	\$21.6	\$2.8	\$0.8	\$25.2
Food & Beverage	\$16.8	\$1.6	\$1.6	\$20.0
Gasoline stations	\$18.3	\$0.0	\$0.2	\$18.5
Business Services		\$7.6	\$0.8	\$8.4
Lodging	\$5.7	\$0.0	\$0.0	\$5.7
Recreation and Entertainment	\$3.8	\$0.2	\$0.1	\$4.2
Construction and Utilities		\$3.1	\$0.3	\$3.3
Education and Health Care		\$0.0	\$2.8	\$2.8
Other Transport	\$0.2	\$1.5	\$0.3	\$2.0
Personal Services		\$1.2	\$0.5	\$1.7
Wholesale Trade		\$0.6	\$0.2	\$0.9
Communications		\$0.5	\$0.2	\$0.7
Manufacturing		\$0.4	\$0.1	\$0.4
Agriculture, Fishing, Mining		\$0.1	\$0.1	\$0.2
Air Transport		\$0.1	\$0.0	\$0.1

Source: Tourism Economics



Tax Impacts

Visitor activity generated \$69.9 million in government revenues in 2024.

State and local taxes alone topped \$32 million in 2024.

Each household in McCurtain County would need to be taxed an additional \$2,867 to replace the visitor-generated taxes received by state and local governments in 2024.

Tax Impacts (2024)

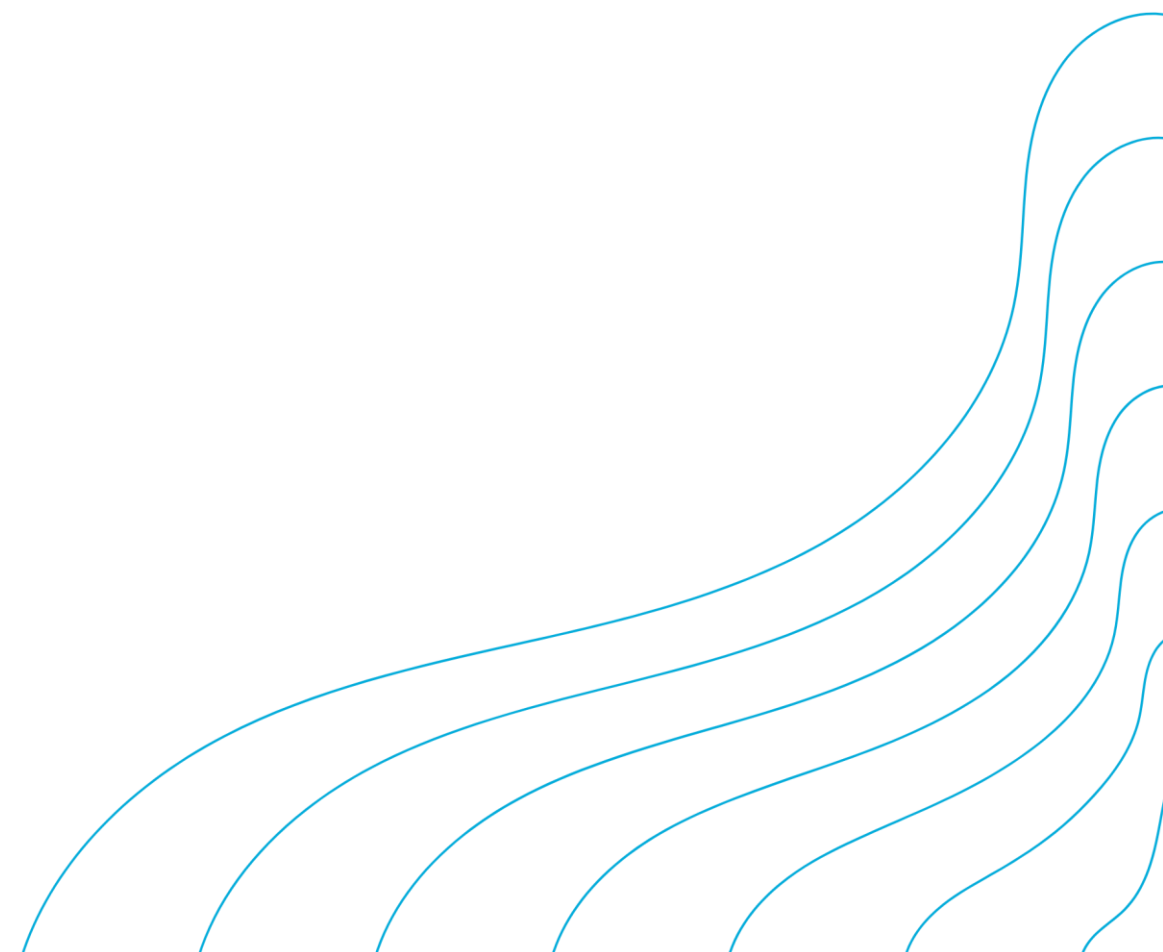
\$ millions

	Direct	Indirect / Induced	Total
Total Tax Revenues	\$53.1	\$16.7	\$69.9
Federal Taxes	\$28.5	\$9.0	\$37.5
Personal Income	\$9.7	\$3.2	\$12.9
Corporate	\$5.5	\$1.4	\$6.9
Indirect Business	\$0.8	\$0.3	\$1.1
Social Insurance	\$12.4	\$4.1	\$16.6
State and Local Taxes	\$24.7	\$7.7	\$32.4
Sales	\$9.5	\$4.4	\$13.9
Bed Tax	\$4.4		\$4.4
Personal Income	\$2.1	\$0.7	\$2.8
Corporate	\$1.1	\$0.3	\$1.4
Excise and Fees	\$3.6	\$1.1	\$4.7
Property	\$3.9	\$1.2	\$5.1

Source: Tourism Economics



APPENDIX



Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The analysis of the McCurtain County visitor economy begins with direct visitor spending. These estimates are strengthened through an analysis of industry-specific datasets on the lodging industry and sectoral-level business sales. Government data, including lodging taxes, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

Data Sources

- **STR and AirDNA:** Lodging performance data, including room demand and revenue, for hotels and short-term rentals
- **Oklahoma Tax Commission:** Sales tax receipts, by industry
- **McCurtain County Tourism Authority:** Lodging tax receipts, including taxes on cabins and short-term rentals
- **Datafy:** Mobile geolocation and credit card spending data, by spending category
- **BEA/BLS:** Employment and wage data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory

Methodology Note

We acknowledge the critical role the Choctaw Nation plays in enriching McCurtain County’s tourism offering and bringing travelers to the county. The data used in this analysis encompasses all visits to McCurtain County. However, because tribal tourism data is private, this analysis is unable to confirm the precise magnitude of these activities. As a result, the total economic impact of tribal tourism may not be wholly reflected in this report.

Glossary

SPENDING DEFINITIONS	LODGING	All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.
	FOOD & BEVERAGE	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
	RECREATION	Includes visitors spending within the arts, entertainment and recreation sector.
	RETAIL	Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.
	LOCAL TRANSPORT	Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.
	AIR TRANSPORT	Where applicable, the local share of air transportation spending.
ECONOMIC IMPACT DEFINITIONS	SECOND HOMES	Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.
	DIRECT IMPACT	Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).
	INDIRECT IMPACT	Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).
	INDUCED IMPACT	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.
	EMPLOYMENT	Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
	PERSONAL INCOME	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
	LOCAL TAXES	City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.
	STATE TAXES	State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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