

Marshall County

Tourism Development Plan



2021 Marshall County Tourism Assessment

INTRODUCTION

The Marshall County Tourism Assessment is a roadmap to help move Marshall County forward over the next five years and to harness its true tourism potential. The Chickasaw Country team was tasked with evaluating the current state of tourism assets, the untapped tourism resources and what tourism resources are needed to increase visitation within the county. This was accomplished by working with the major stakeholders of the county. The list of stakeholders includes cities, Chambers, DMO's, educational facilities and local businesses.

Chickasaw Country is a destination marketing organization, within the Chickasaw Nation Department of Commerce, promoting both Chickasaw-owned and non-Chickasaw tourism assets within the 13 counties in south-central Oklahoma known as the Chickasaw Nation. Chickasaw Country promotes tourism to local, regional, national and international visitors in hopes of generating exposure, garnering interest and driving visits to the region.

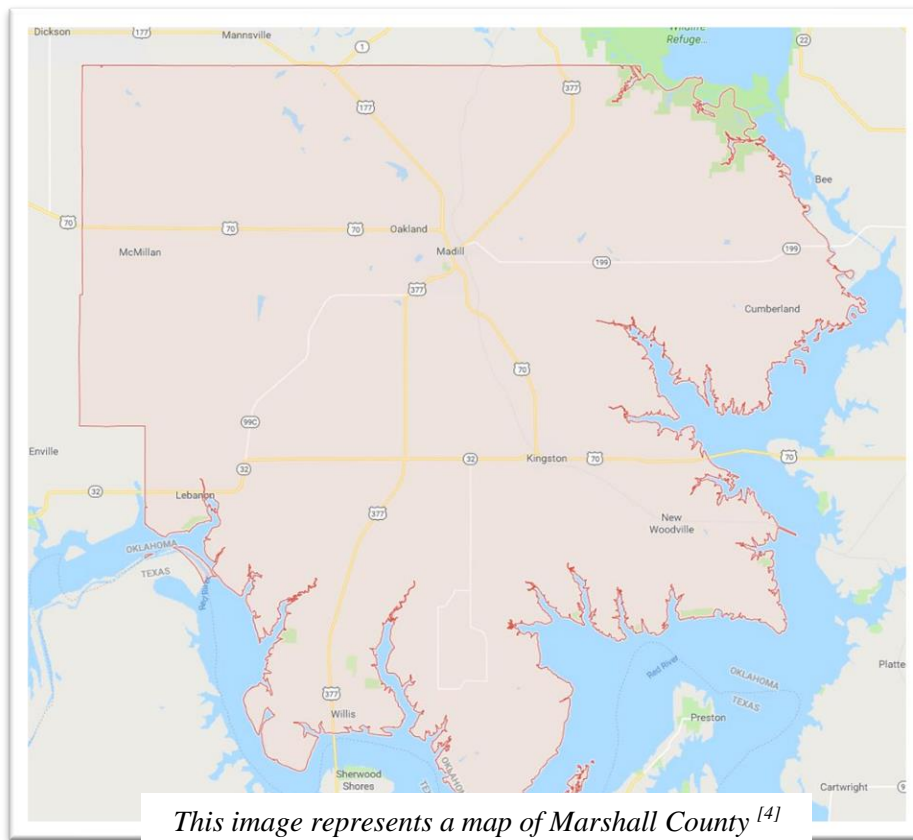
This assessment – and the related goals and strategies – is the result of the Chickasaw Country team's extensive conversation with stakeholders and Marshall County leadership. The planning process used to develop this final document was open and transparent, with stakeholders encouraged to provide both positive and negative feedback about the current state of tourism within their region.

It is important to highlight that the plan was developed during an economically challenging time, for Marshall County and stakeholders within both the public and private sectors. To help anticipate financial and time commitments required in implementation, the plan includes recommended phasing. Strategies in the early years are intended to ensure a smooth transition towards the fulfillment of this newly focused tourism strategy.

The factors outlined below are important in context to the plan and its strategic direction. These factors include a snapshot of the current Marshall County tourism industry, prioritization of overnight visitors versus day trippers, the role of tourism in economic development, the characteristics of a highly functioning tourism system and the value of diverse assets.

County Snapshot

As part of the Marshall County Tourism Assessment, the Chickasaw Nation Tourism team considered the current state of the tourism market within Marshall County. The Dean Runyan Associates data indicates that Marshall County employed 610 tourism workers in 2018 and attracted \$50.7 million in visitor spending^[1]. This assessment seeks to continue the growth of the county's tourism industry by building upon its current strengths and potential tourism assets.



This image represents a map of Marshall County [4]

Current County Population: 16,931 (2019) [3]

- Age 0-5 5.9%
- Age 6-18 23.1%
- Age 19-64 49.1%
- Ages 65+ 21.9%

- Female 51.2%
- Male 48.8%

Current Economic Resources: [1-10]

- Agriculture
- Oil & Gas
- Wire/steel plants
- Trailer manufacturing plants
- Annual community events
- Lake Texoma

Current County Unemployment Rate: [5]

- April 2021 4%
- April 2020 16.2%
- April 2019 2.8%

Current Tourism Related Organizations: [6-10]

- Marshall County Chamber of Commerce
- Chickasaw Country Marketing Association
- Lake Texoma Association

Cities with Tourism Product:

- Madill
- Kingston
- Willis

Overnight Spending

This assessment addresses leisure, business and event-based visitors who come from outside of the county. Visitors may come from a nearby county, surrounding states or internationally. Their stay may range from a few hours to a few days per visit. According to 2018 Dean Runyan Associates data, the average overnight spend per person in Marshall County is \$49 and the average spend per person for a multiple night stay is \$119.

Because of the significant difference in the economic value of an overnight visitor versus a multiple night visitor, the ultimate focus of this plan is to generate additional overnight stays, and encourage travelers to stay longer, experience more and return to Marshall County.

Much of the plan focuses on cross-promotion between experiences. It creates compelling, yet convenient, ways for visitors to see more than the main attractions that inspired their visit. This portion of the plan also serves to strengthen attractions for day travelers visiting Marshall County.

Tourism is Economic Development

Tourism is the third economic driver for the state of Oklahoma creating 103,600 jobs in 2018. Domestic and international travelers to Oklahoma spent \$9.6 billion in 2018 and generated \$1.1 billion to federal, state and local governments. The tourism industry in Marshall County represented approximately 8.8% of the county's total employment in 2018 and paid more than \$14.17 million in total wages in 2018^[1]. Tourism jobs are valuable because they provide employment opportunities for a multitude of people. Some will advance up the career ladder in tourism, moving from entry-level service positions to higher-paying jobs while others will build on the skills and experience they gain in the tourism sector to branch out into other sectors.

Tourism brings in monetary funds that would otherwise never enter the local economy. In Marshall County, visitors who spend money at tourist attractions, restaurants, overnight accommodations, gas stations and other related suppliers of tourism-related goods or services bring new currency to the area.

Many of these funds get circulated within Marshall County's economy, leading to additional jobs and income for residents. Many tourism investments work to attract and serve visitors while contributing to the quality of life for Marshall County residents.

Highly Functioning Tourism System

The assessment builds on the successes of previous tourism efforts put forth by the stakeholders within Marshall County, Chickasaw Country and the Chickasaw Nation. Strategies will be established to build on the strengths and weaknesses of Marshall County. As a result of this planned approach, Marshall County is expected to grow as a highly functioning tourism system. At the end of 2021 or five years (2026) the tourism system should include:

- Strong assets that attract visitors to Marshall County and encourage them to stay longer, explore more, and return often.
- Create/Update the county's brand or image that builds on its strengths in a genuine and powerful way.
- Effectively market and promote the county's tourism efforts by cross-promotion.
- Strong supporting infrastructure and services, including overnight accommodations, restaurants and signage.
- A collaborative and coordinated network of partners in the public, private and non-profit sectors working together to strengthen the county's tourism market for the benefit of all.

STRATEGIC APPROACH

The strategic approach and foundational direction for this county's assessment is to focus visitor attention toward the anchor clusters and anchor attractions while simultaneously working to enhance and extend the visitor experience through sustaining clusters and sustaining assets.

The strategic approach begins with performing a SWOT Analysis of the county's current tourism climate. Marshall County focuses promotional efforts around current strengths and opportunities of the county and establish goals and strategies to overcome weaknesses and threats. By performing this analysis, we are able to identify anchor clusters and anchor attractions within the county. The promotion of anchor and sustaining clusters is aided by cooperative marketing, maps, tourism packages, promotions, signage and technology-guided tourism. To support this approach, the plan outlines the need for an improved tourism infrastructure and refined tourism funding.

SWOT Analysis

As a Destination Marketing Organization, Chickasaw Country does not own all of the tourism assets within Chickasaw Country. It is vital that Chickasaw Country portrays realistic expectations on what this region has to offer which is why it is important for us to understand the strengths, weaknesses, opportunities and threats affecting our ability to attract visitors.

Strengths:

- Nearby land, rivers, lakes
- Camping, hunting and fishing
- Rural, undeveloped land
- Annual Sand Bass Festival
- Gaming
- Proximity to Texas
- Proximity to U.S. Highway 75
- Authentic atmosphere
- County government seat

Weaknesses:

- Limited community information
- Community and county websites do not provide current information
- Limited digital representation and marketing efforts
- Limited night life
- Proximity to metropolitan areas
- Limited tourism attractions
- Limited community events
- Limited shopping
- Limited accommodations
- Absence of hotel or tourism tax

Opportunities:

- Opportunity for additional community events and organizations
- Education
- Undeveloped land
- Lake Texoma

- History of Chickasaw Nation
- Limited accommodations
- History throughout towns of Marshall County
- Community marketing efforts

Threats:

- Seasonal tourism revenue
- Weather conditions
- Limited job opportunities
- State budget cuts
- Limited business/individual marketing efforts

Anchor & Sustaining Descriptions

Anchor clusters and anchor attractions were identified by the Chickasaw Country team through stakeholder interviews. These meetings and interviews revealed assets for which Marshall County is best known as well as the most popular tourism draws. The Chickasaw Country team defines anchor clusters and attractions as those strong enough to attract large numbers of visitors from outside the county and those with built-in marketing infrastructure programs.

The list of anchor clusters includes:

- Tribal Assets:
 - Madill Gaming Center
 - Texoma Casino
 - Chickasaw Senior Center
 - Texoma Chickasaw Travel Stop
- Non-Tribal Assets:
 - Chickasaw Pointe Golf Club
 - Madill Art Club
 - Marshall County Genealogical and Historical Society and Museum
 - Lake Texoma

Accommodations	Number of Rooms	Average Weekend Occupancy %	Average Weekday Occupancy %	Average Cost
Hotels, Motels & Inns	212	64%	38%	\$71.75
Cabins & Lodging	37	68%	42%	\$61.00
RV's & Campgrounds	107	74%	42%	\$60.00

**Data collected as of July 2021 [11-30]*

Sustaining clusters and sustaining assets constitute additional places to visit, experience and engage within the community. These clusters are the reason to stay longer, explore off the beaten path and experience local living. The sustaining assets can be even stronger than its anchor assets that do not currently have the drawing power to get visitors to Marshall County on their own. However, a few of the clusters and attractions listed as sustaining in this plan may evolve into future anchor attractions as they draw more attention and their marketing efforts grow.

The list of sustaining clusters includes:

- Tribal Assets:
 - Chickasaw Children’s Village
- Non-Tribal Assets:
 - Agri-tourism related destinations (seasonal)
 - Hunting, fishing, and camping
 - Land, Rivers, and Lakes nearby
 - Atmosphere
 - Sand Bass Festival
 - Marshall County Fairgrounds

Hidden Assets Identified

Hidden Assets were the third category of tourism assets identified in the strategic approach. Hidden assets are not well known and are closely connected with community life. The Chickasaw Country team identified places, people, culture and activities a tourist would consider ‘authentic’ and allow them the “live like a local.”

Through the hidden asset analysis, the Chickasaw Country team identified four (4) “new” assets. The analysis revealed a number of cultural, natural resource and sustainability events that would never surface through a conventional tourism assessment. The integration of these hidden assets with the more significant attractions and assets has many benefits. Beyond building respect for the communities where tourism occurs, these benefits include:

- Deepening and creating more authentic visitor experiences.
- Bridging business travel with leisure travel.
- Creating additional funding streams for tourism, such as Preserve America grants or Heritage Tourism funds.
- Improving the financial success of small towns and natural resource assets.
- Expanding the overall market for tourism by bringing in new visitors.
- Linking current and new residents to the history and culture of the area.
- Leveraging local residents as tourism ambassadors for visiting friends and relatives.

The list of hidden assets includes: ^[6-10]

- Tribal Assets:
 - Burney Institute/Chickasaw Orphans Home
- Non-Tribal Assets:
 - **Fobb Bottom**
 - **Celebrity Lake House**
 - **Ghost Towns**

Overview of Goal & Strategies

Goals

- Goal 1: Create dashboard used to report tourism-related data from local businesses, community destinations and attractions.
 - Strategy: Chamber of Commerce and tourism organizations to create monthly reporting documents to track revenue, city sales tax, visitation to determine a specific trend within the community.
- Goal 2: Create a county-wide marketing plan.
 - Strategy: Identify stakeholders who will assist in designing the plan and determine budgeting aspects.

TOURISM DEVELOPMENT IMPLEMENTATION

Goal 1: Create dashboard used to report tourism-related data from local businesses, community destinations and attractions.

Strategy: Chamber of Commerce and tourism organizations to create monthly reporting documents to track revenue, city sales tax, visitation to determine a specific trend within the community.

- Rationale – This goal and strategy is important to the county in order to assist with future business decisions based off visitation and spending trends.
- Approach – Determine individual or entity responsible for developing report. Determine necessary data based off feedback from stakeholders and determine distribution process.
- Tasks – Develop report formatting. Develop communication efforts in order to educate businesses on benefits of reporting information. Set deadlines for reporting to ensure data is secured in a timely manner. Compile received data and distribute results.
 - Timeline – This will be updated monthly.
 - Resources – Community point person, business participation and data.

Goal 2: Create a county-wide marketing plan.

Strategy: Identify stakeholders who will assist in designing the plan and determine budgeting aspects.

- Rationale – This goal and strategy is important in order to generate awareness and increase visitation and revenue within the county.
- Approach – Determine individual or entity responsible for developing the marketing plan. Identify tourism pillars to be marketed and determine budget.
- Tasks – Develop plan format and utilize County Tourism S.W.O.T. Analysis as a guideline to be adjusted as needed. Coordinate meetings to receive feedback from community stakeholders and businesses. Compile received information and determine measurements, advertising mediums and budget.
 - Timeline – This will be created each at the beginning of each fiscal year (*suggested*).
 - Resources – Community stakeholders, individuals, businesses, organizations and DMO's.

TARGET MARKET

Introduction

Marshall County's target audience is determined by the following demographics, geographic markets and niche groups based on tourism offerings and resources.

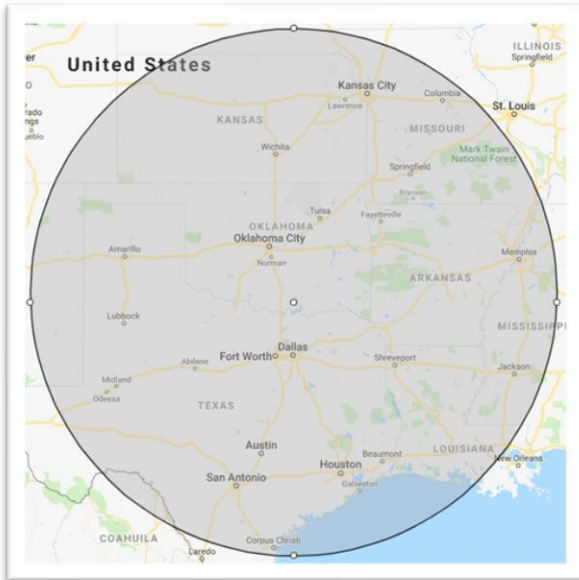
Demographics

In the travel industry over 70% of all family vacations are planned by the female of the household, according to US Travel Research data. Based on tourism assets available and numerous outdoor recreational activities driving male visitation and conversations with community stakeholders, the following age range was determined as Marshall County's target market. [6-10]

- Female: 19 – 65
- Male: 25 – 70

Geographic Regions

Research shows that a traveler feels a 450-mile radius is a comfortable distance to travel for a vacation or getaway and we believe that north Texas and Oklahoma City Metro Area are ripe markets for the unique experience Marshall County has to offer. Research shows that the international market is very interested in the Native American culture the close proximity Chickasaw Country has to DFW airport and their direct flights, International is a prime market:



Radius of 450 miles from Marshall County [2]

- **Oklahoma**
 - Tulsa
 - Oklahoma City
 - Norman
 - Lawton
- **Texas**
 - Dallas/Ft. Worth
 - Abilene
 - North Texas
 - Austin
 - Houston
 - Amarillo
 - Lubbock
- **Arkansas**
 - Hot Springs
 - Texarkana
- **Kansas**
 - Wichita
 - Lawrence
 - Hutchinson
- **Louisiana**
 - Shreveport
- **Missouri**
 - Springfield
 - Branson
- **International**
 - Canada
 - Mexico
 - Germany
 - Australia

Other Customer Segments

Niche Markets: [6-10]

- Native American Heritage
- Hunters and Fishermen
- Unique Festival seekers
- Outdoor & Small-town Adventurers
- Ghost town seekers
- Bed & Breakfast stayers
- Country Music/Western fans

EVENTS

Marshall County plans to continue supporting events in select communities. Events are planned to help drive tourist to the community and help local businesses generate revenue. Marshall County hosted the following annual events:

CITY / EVENT	TIME OF YEAR
Madill	
Marshall County Livestock Show	February
Marshall County Chamber Banquet	April
FFA Rodeo	April
National Sand Bass Festival	June
Round-Up Club Rodeo	July
Marshall County Fair	September
Little Mr. & Miss Marshall County	September
Madill Art Show	October
Reuel Little Classic 5K	October
The Marshall County Christmas Parade	December
Kingston	
Kingston Holiday Parade	December

By hosting these events with local Chambers, businesses and cities, it gives Marshall County the opportunity to be seen as a destination attraction.

Chickasaw
COUNTRY

RESOURCES

- 1) Dean Runyan Associates (December 2019). Oklahoma Travel Impacts. Retrieved from <https://ds8hbldo2z4gr.cloudfront.net/wp-content/uploads/2018/06/OK-Travel-Impacts-Statewide-and-County-Impacts-2010-20181.pdf>
- 2) Radius Tool: <https://www.mapdevelopers.com/draw-circle-tool.php>
- 3) United States Census Bureau (2019). QuickFacts Marshall County, Oklahoma. Retrieved from <https://www.census.gov/quickfacts/fact/table/marshallcountyoklahoma,US/PST045219>
- 4) Google Maps
- 5) Economic Research (2021). Unemployment Rate in Marshall County, Oklahoma. Retrieved from <https://fred.stlouisfed.org/series/OKMARS5URN>
- 6) Marshall County Chamber of Commerce, Madill, OK; Personal Communication, March 2, 2017
- 7) L. Wilkerson; Personal Communication, March 21, 2017
- 8) A. Green; Personal Communication; March 21, 2017
- 9) B. Cobbs; Personal Communication; March 28, 2017
- 10) R. Talley; Personal Communication, March 28, 2017
- 11) Overnight Accommodations: Alberta Creek Resort; Personal Communication, July 2021
- 12) Overnight Accommodations: Arrowhead Pointe Lodge; Personal Communication, July 2021
- 13) Overnight Accommodations: Bob's Lake Country Motel; Personal Communication, July 2021
- 14) Overnight Accommodations: Buncombe Corner Stripers Inn; Personal Communication, July 2021
- 15) Overnight Accommodations: Buncombe Creek Marina; Personal Communication, July 2021
- 16) Overnight Accommodations: Cabin Fever Adventure at Red Rock Cabins; Personal Communication, July 2021
- 17) Overnight Accommodations: Caney Creek Resort; Personal Communication, July 2021
- 18) Overnight Accommodations: Harbor Inn Bed & Breakfast; Personal Communication, July 2021
- 19) Overnight Accommodations: Kingston Lodge; Personal Communication, July 2021
- 20) Overnight Accommodations: Lakeway Motel; Personal Communication, July 2021
- 21) Overnight Accommodations: Marina Del Rey; Personal Communication, July 2021
- 22) Overnight Accommodations: Texoma Cabin; Personal Communication, July 2021
- 23) Overnight Accommodations: Texoma Lakeside Motel, RV & Cabins; Personal Communication, July 2021
- 24) Overnight Accommodations: The Woods – A Place to Stay at Lake Texoma; Personal Communication, July 2021
- 25) Overnight Accommodations: Best Western Plus Sand Bass Inn & Suites; Personal Communication, July 2021
- 26) Overnight Accommodations: Bridgeview Resort; Personal Communication, July 2021
- 27) Overnight Accommodations: Little Glasses Resort & Marina; Personal Communication, July 2021
- 28) Overnight Accommodations: Madill Inn; Personal Communication, July 2021
- 29) Overnight Accommodations: Texoma Shores Resort; Personal Communication, July 2021
- 30) Overnight Accommodations: The American Inn; Personal Communication, July 2021