



## Idaho 2013 Visitor Profile

### Idaho Conference on Recreation & Tourism

May 7, 2014  
Sun Valley, Idaho  
AnnDee Johnson

# Longwoods International



- ◉ Established in 1978 as consultancy-focused research company
- ◉ Tourism since 1985
  - ◉ 9,000 interviews – changing Canada's image

# Longwoods International



- ◉ Today Travel USA®
- ◉ *Screens 2,000,000 Americans annually on-line*
- ◉ *Employed by States, CVBs, industry associations, hotels, cruise lines, to assist in the planning of their tourism marketing efforts.*
- ◉ We specialize in integrated research programs:
  - ◉ *Visitor tracking and profiling*
  - ◉ *Image and branding*
  - ◉ *Accountability/communication effectiveness - **Longwoods R.O.EYE™***

# Longwoods International



- Client base throughout North America
- *Research programs conducted in U.S., Canada, U.K., Japan, Mexico, Germany, Argentina, Brazil, and Colombia*

# Travel Clients



# Non-Travel Clients



# Peer Awards



- TTRA
- MRIA
- “*Best Practices in Tourism,*” Dr. Rich Harrill
- ARF – David Ogilvy Award

# Introduction



- Large-scale syndicated visitor research quarterly since 1990
- Online since 2007
- Each quarter, a random cross-section of online sample invited to participate
- A reminder is e-mailed several days later to non-responders.
- Largest ongoing study ever conducted of American travelers
- Overview for Idaho's domestic tourism business in 2013
- Does not include any international tourism analysis, including Canada.



# Key Terms Defined



- ⦿ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ⦿ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- ⦿ A **Person-Trip** is one trip taken by one visitor
  - ⦿ *Person-trips are the key unit of measure for this report.*

# Trip-Type Segments



## Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** includes all trips where the main purpose was one of the following:
  - *Visiting friends/relatives*
  - *Touring through a region to experience its scenic beauty, history and culture*
  - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
  - *Special event, such as a fair, festival, or sports event*
  - *City trip*
  - *Cruise*
  - *Casino*
  - *Theme park*
  - *Resort (ocean beach, inland or mountain resort)*
  - *Skiing/snowboarding*
  - *Golf*
- **Business Trips:** includes
  - *Conference/convention*
  - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

### Marketable Trips:

Includes all leisure trips, with the exception of visits to friends/relatives

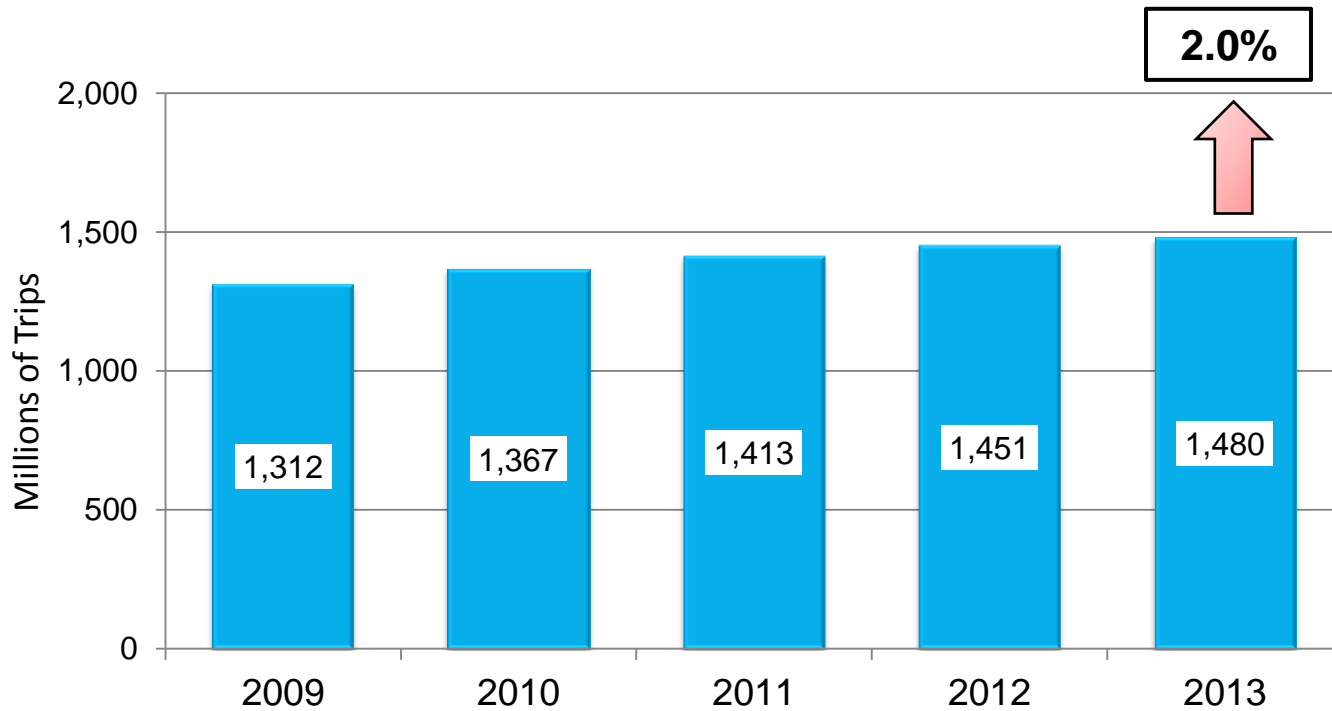


# Size & Structure of the U.S. Travel Market

# Total Size of the U.S. Travel Market — 2009-2013



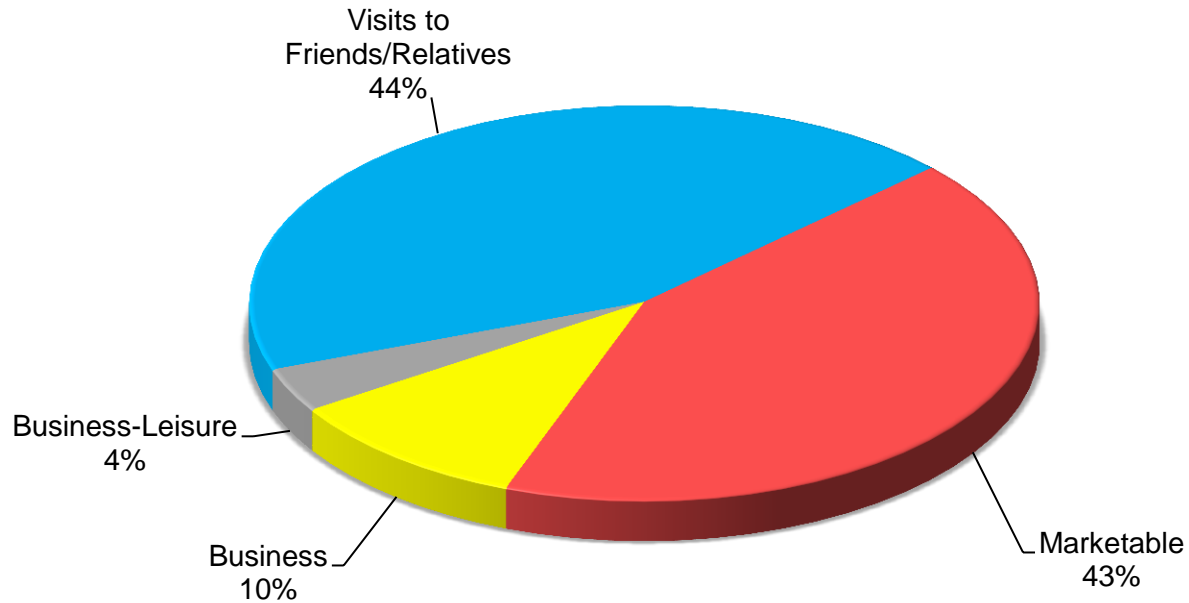
Base: Total Overnight Trips



# Structure of the U.S. Travel Market — 2013 Overnight Trips



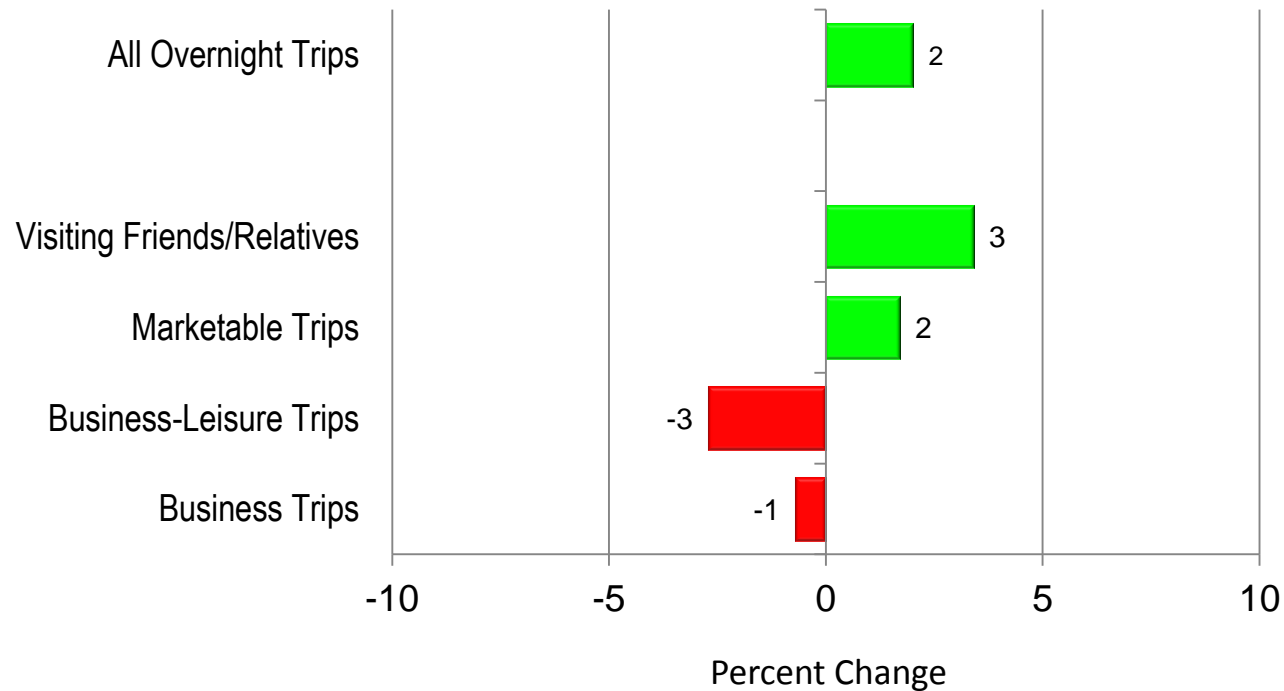
Base: Adult Overnight Trips



# U.S. Market Trends for Overnight Trips — 2013 vs. 2012



Base: Overnight Trips



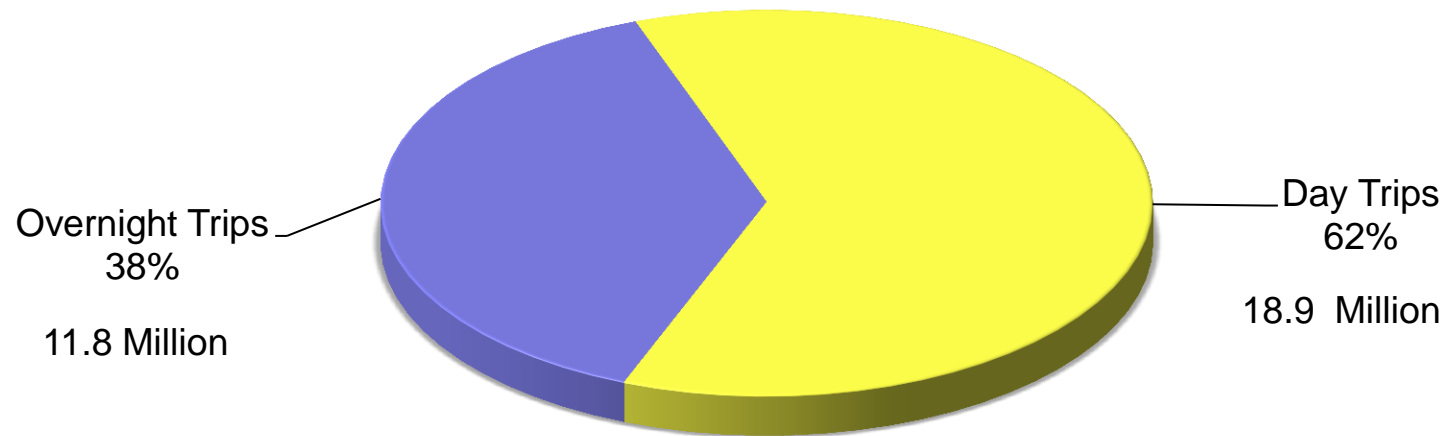


# Size & Structure of Idaho's Travel Market

# Total Size of the Idaho Travel Market in 2013



**Total Person-Trips\* = 30.7 Million**



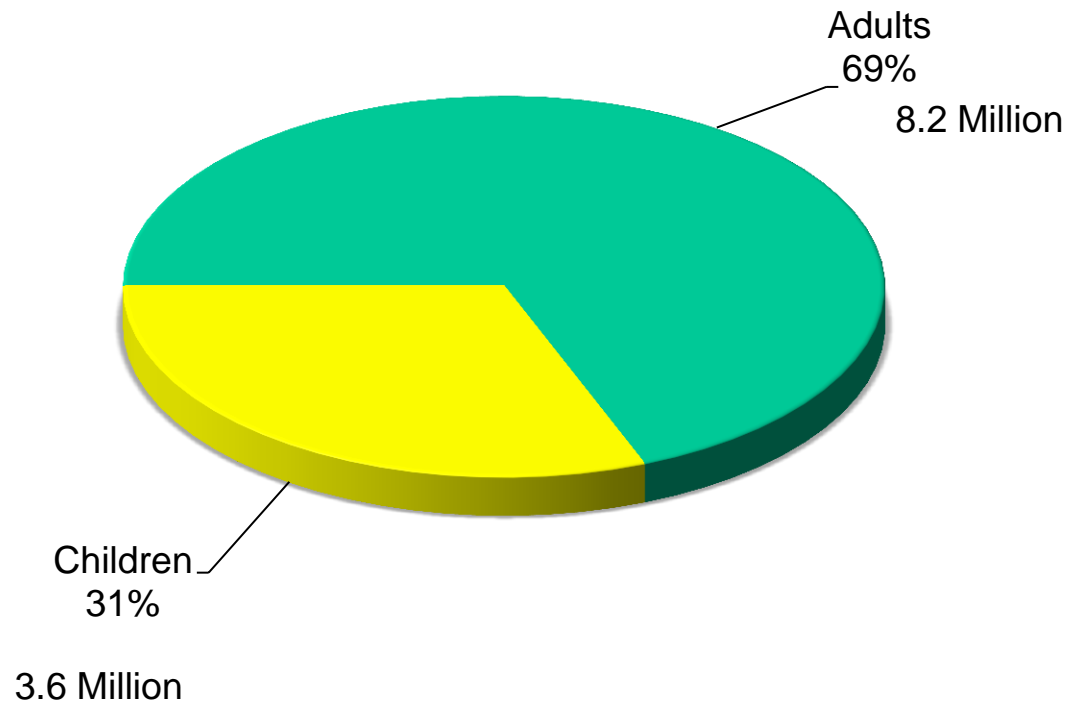
\*Total volume includes both adults and children



# Size of Idaho's Overnight Travel Market — Adults vs. Children



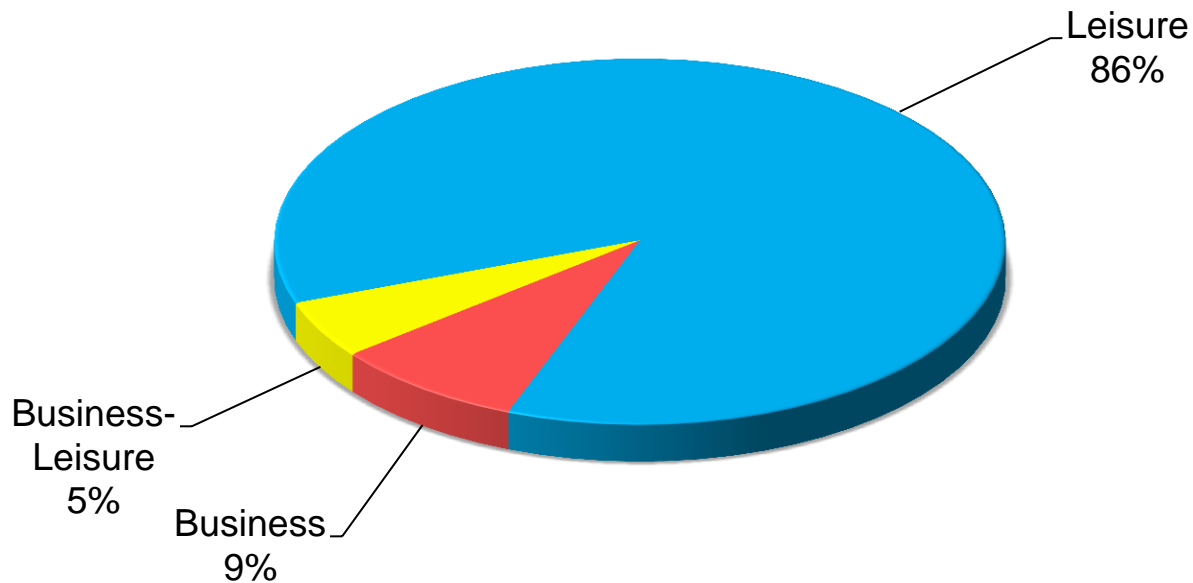
**Total Overnight Person-Trips = 11.8 Million**



# Idaho's Overnight Travel Market — by Trip Purpose



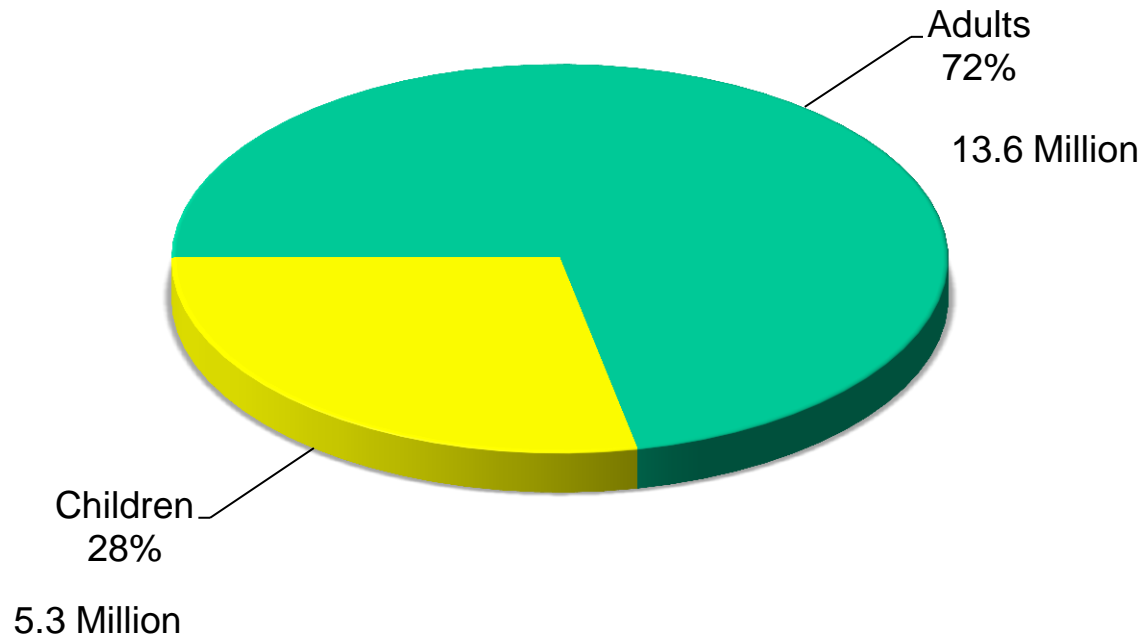
**Adult Overnight Person-Trips = 8.2 Million**



# Size of Idaho's Day Travel Market — Adults vs. Children



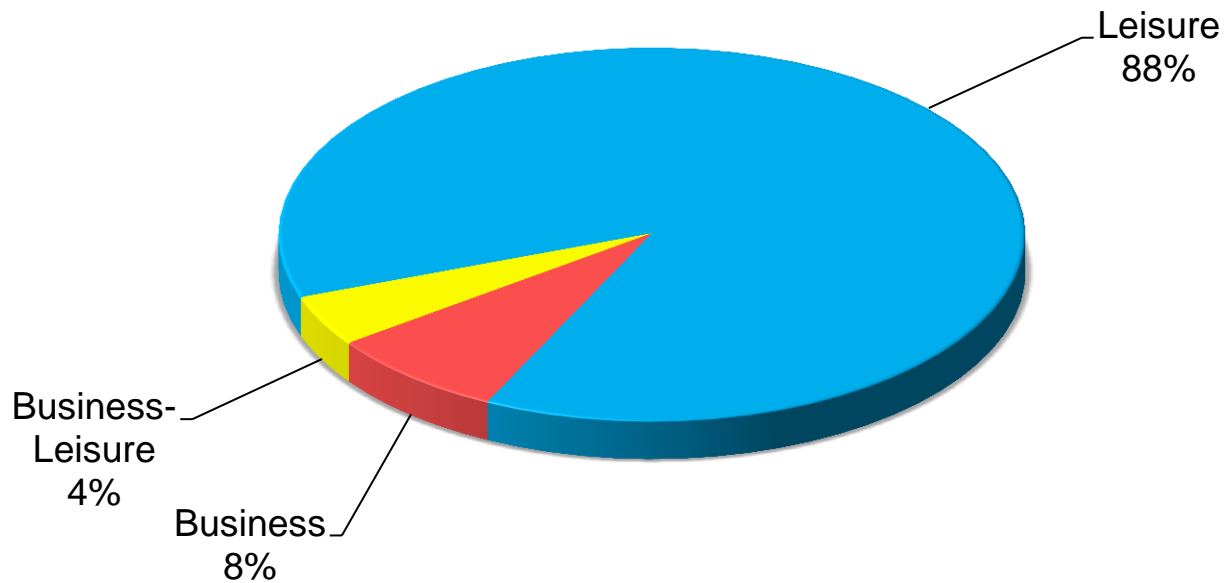
**Total Day Person-Trips = 18.9 Million**



# Idaho's Day Travel Market — by Trip Purpose



**Adult Day Person-Trips = 13.5 Million**





# Overnight Trip Detail

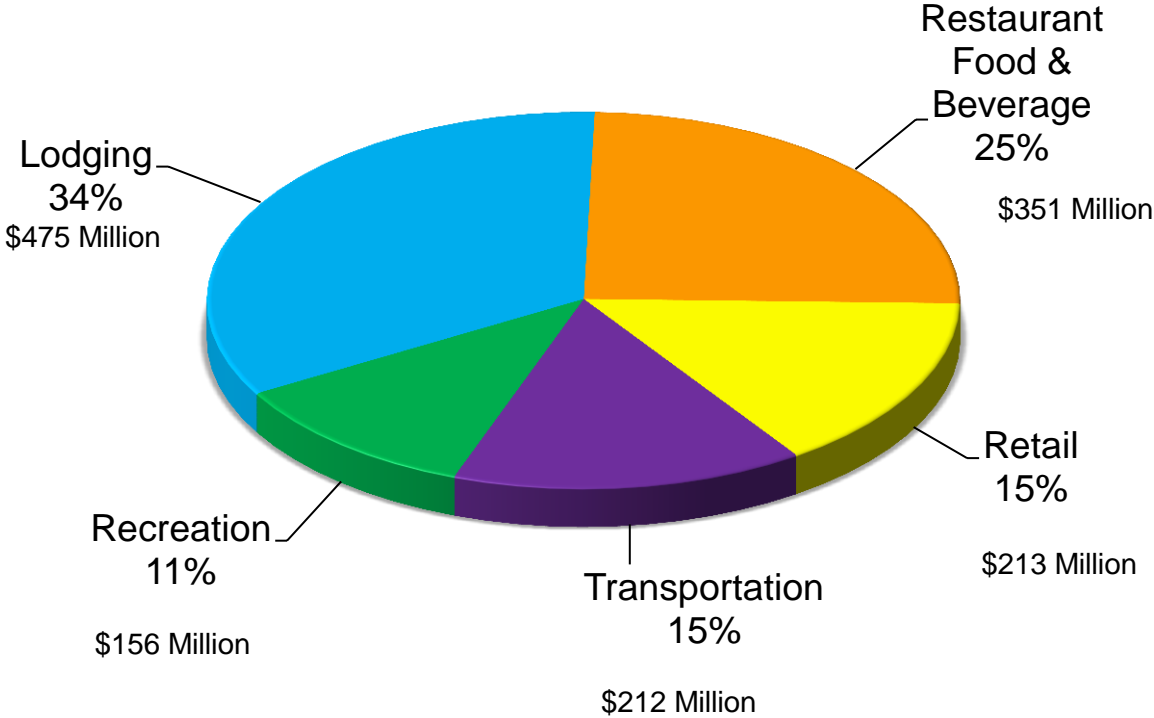


# Overnight Expenditures

# Total Overnight Spending – by Sector



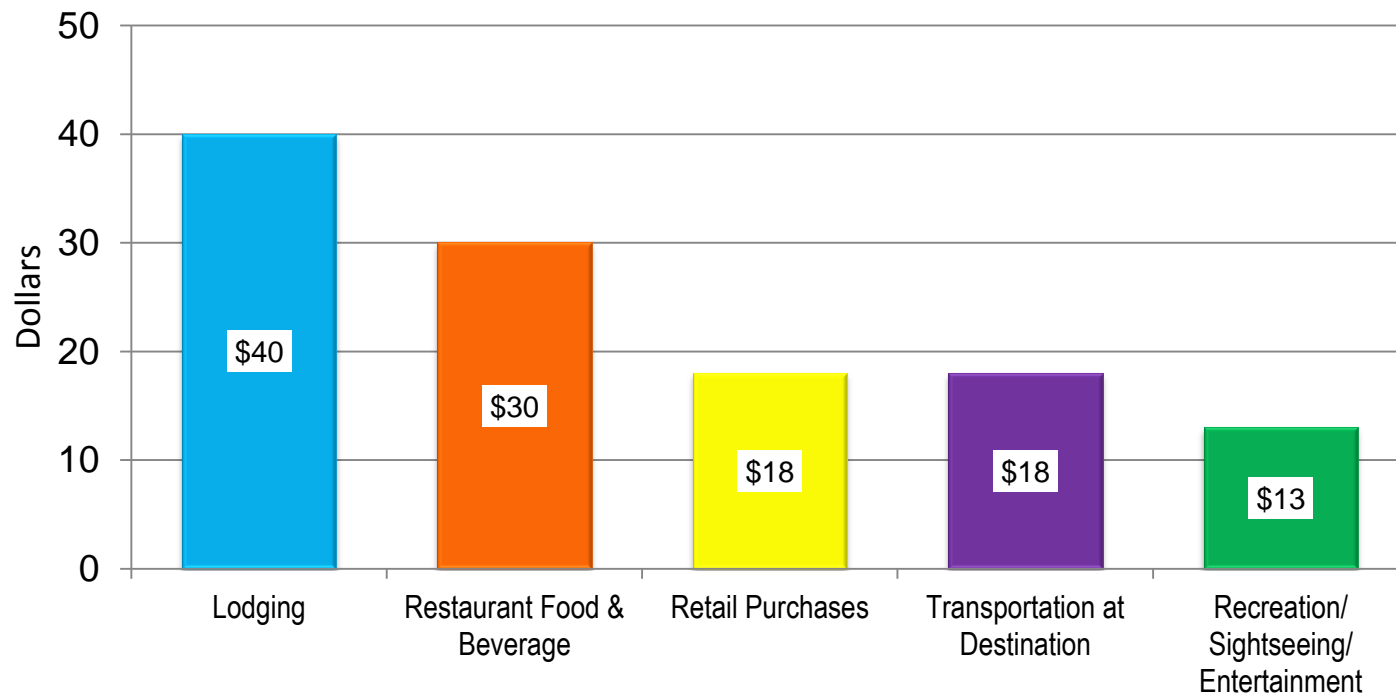
**Total Spending = \$1.4 Billion**



# Average Per Person Expenditures on Overnight Trips — By Sector



Base: Total Overnight Person-Trips

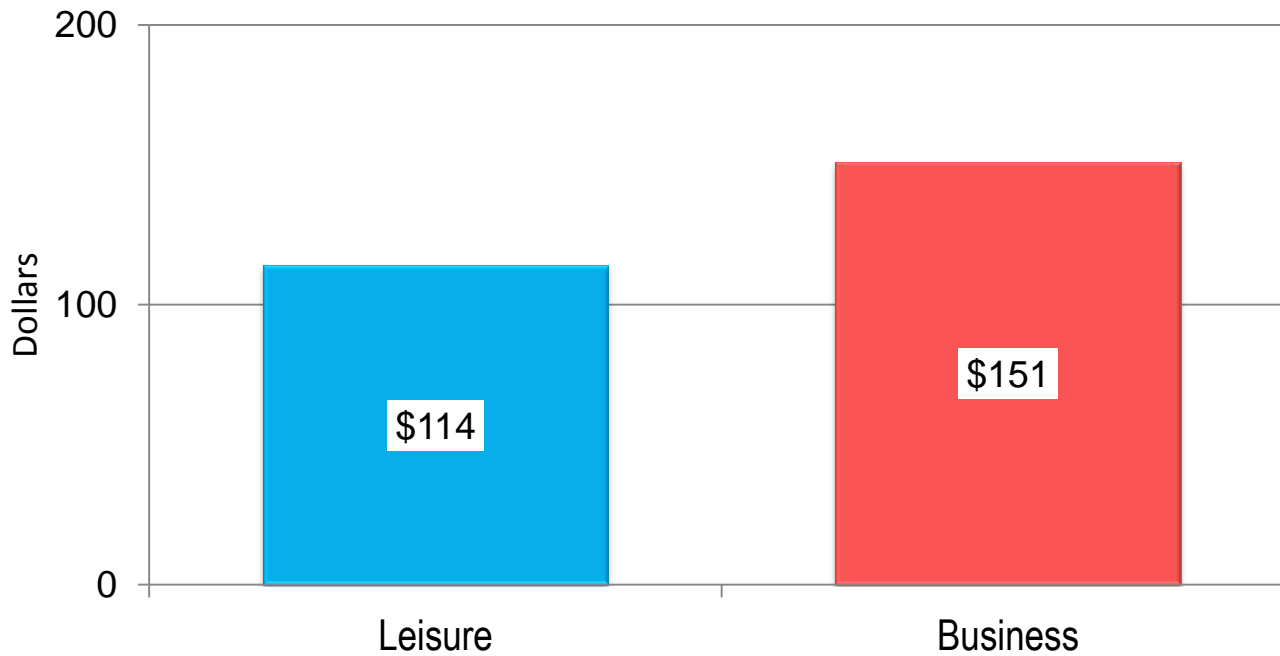




# Average Per Person Expenditures on Overnight – by Trip Purpose



Base: Total Overnight Person-Trips





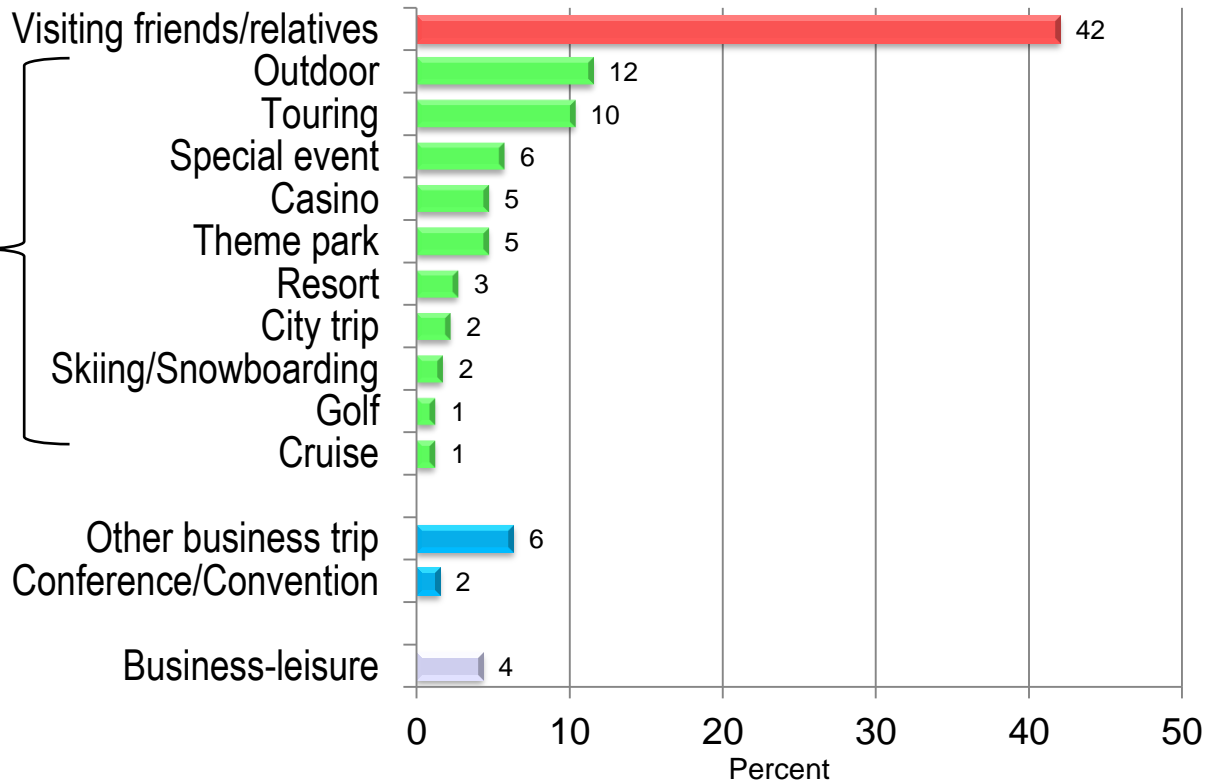
# Overnight Trip Characteristics

# Main Purpose of Trip



Base: Overnight Person-Trips to Idaho

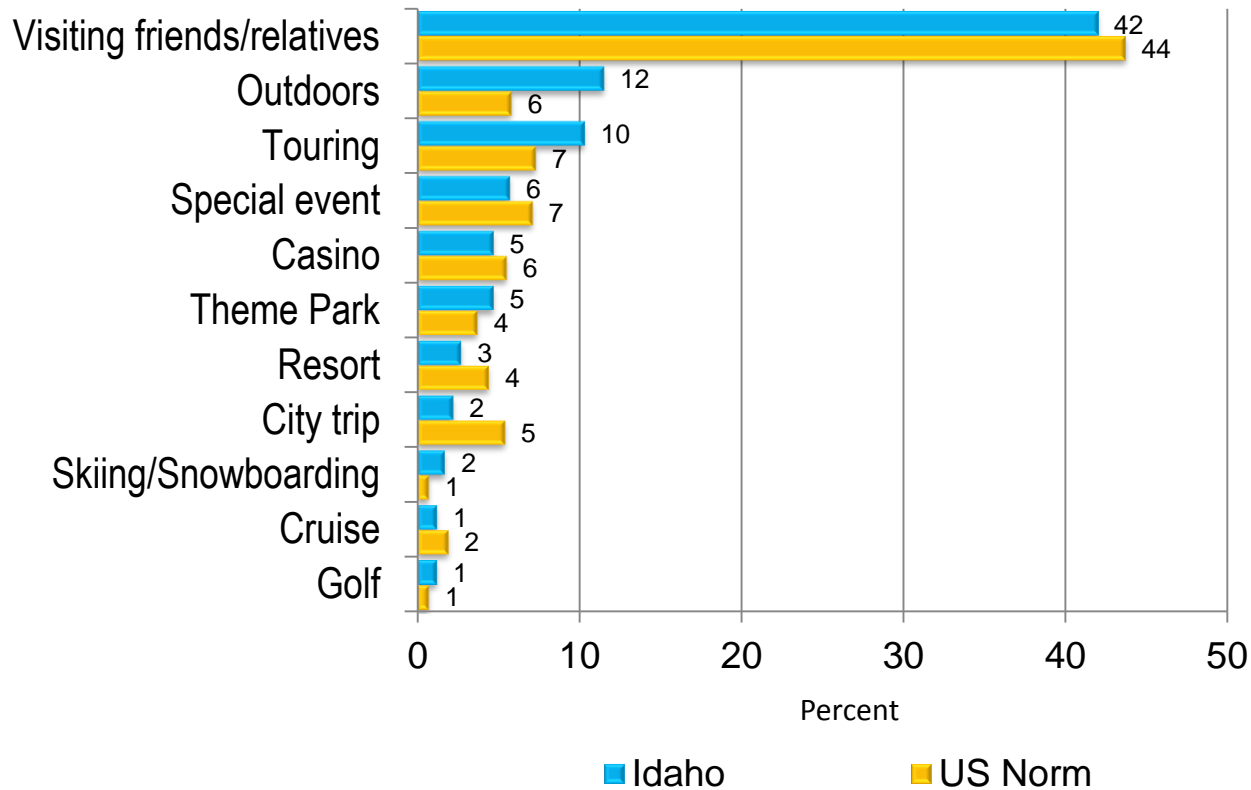
**Marketable  
Trips**



# Main Purpose of Leisure Trip — Idaho vs. National Norm



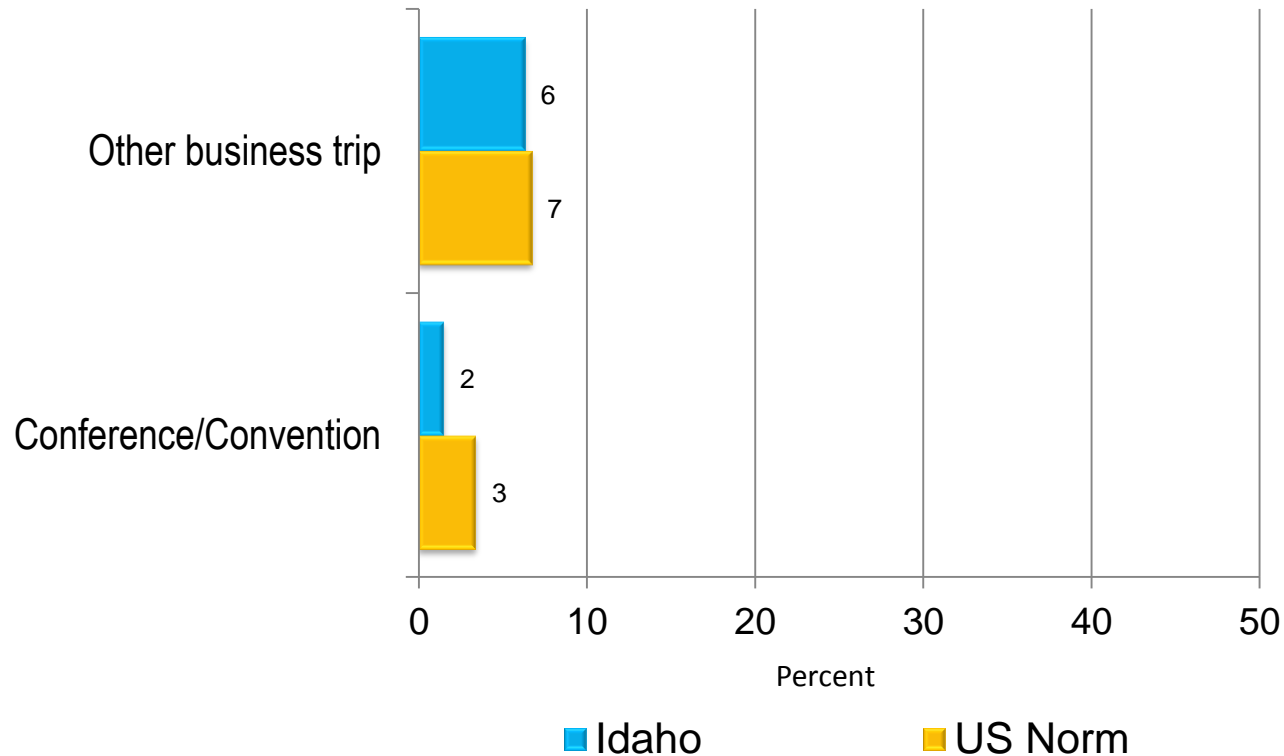
Base: Overnight Person-Trips



# Main Purpose of Business Trip — Idaho vs. National Norm



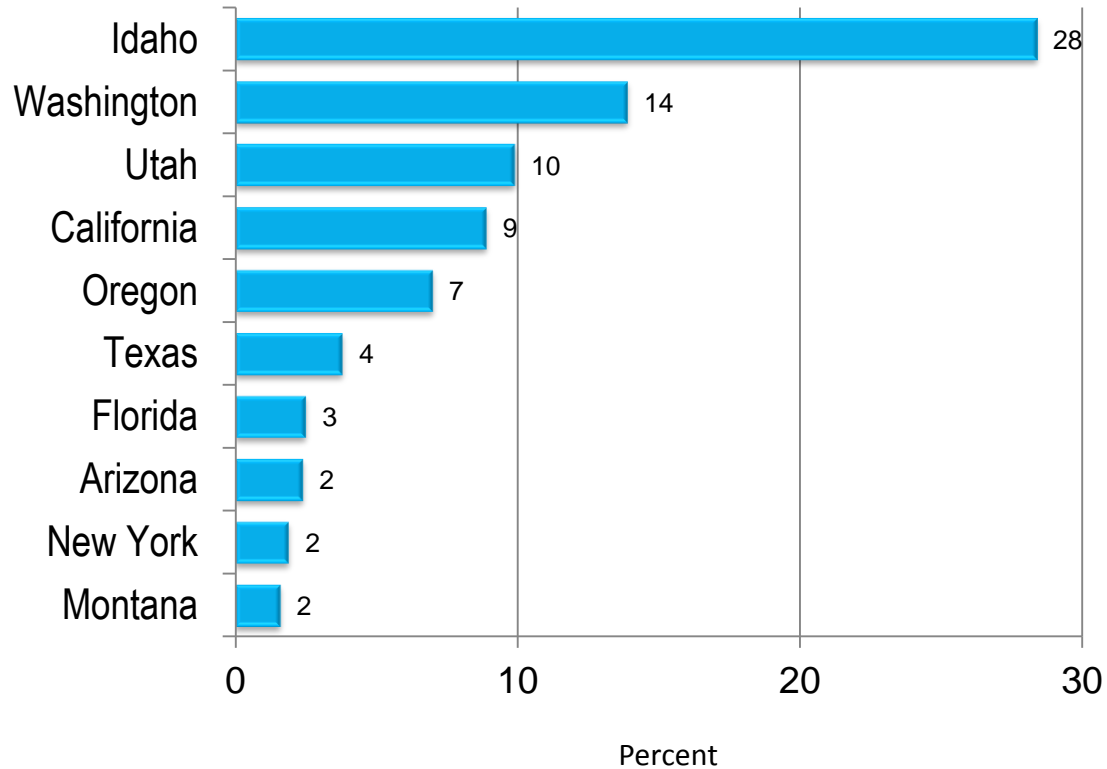
Base: Overnight Person-Trips



# State Origin Of Trip



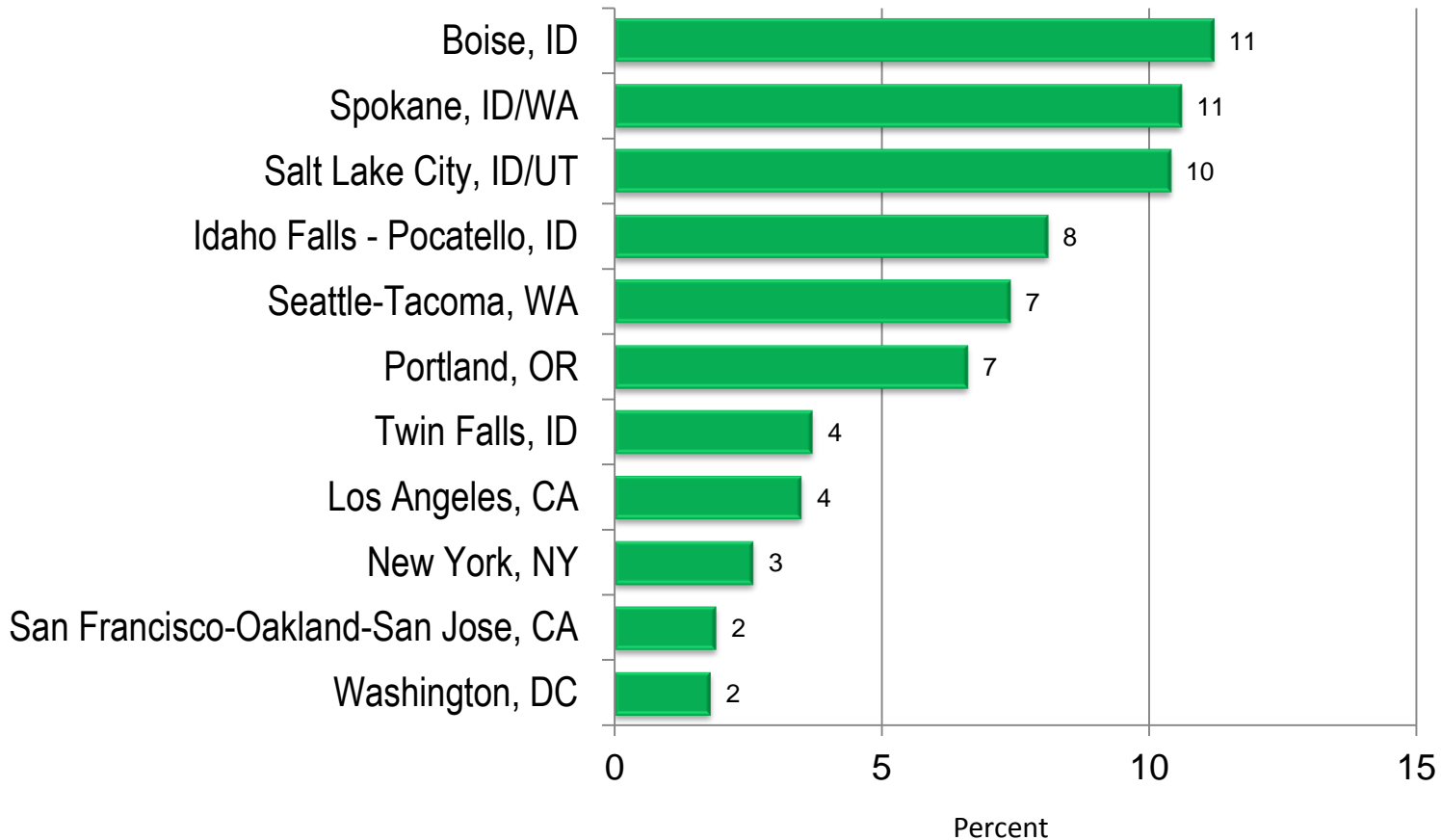
Base: Overnight Person-Trips to Idaho



# DMA Origin Of Trip



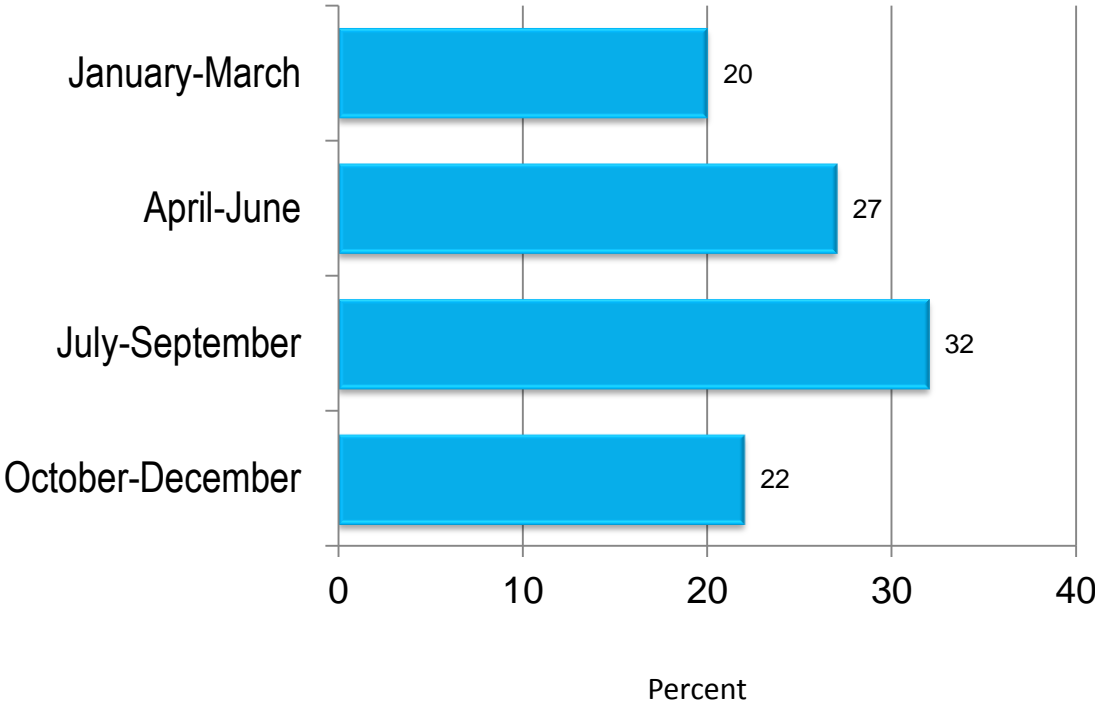
Base: Overnight Person-Trips to Idaho



# Season of Trip



Base: Overnight Person-Trips to Idaho

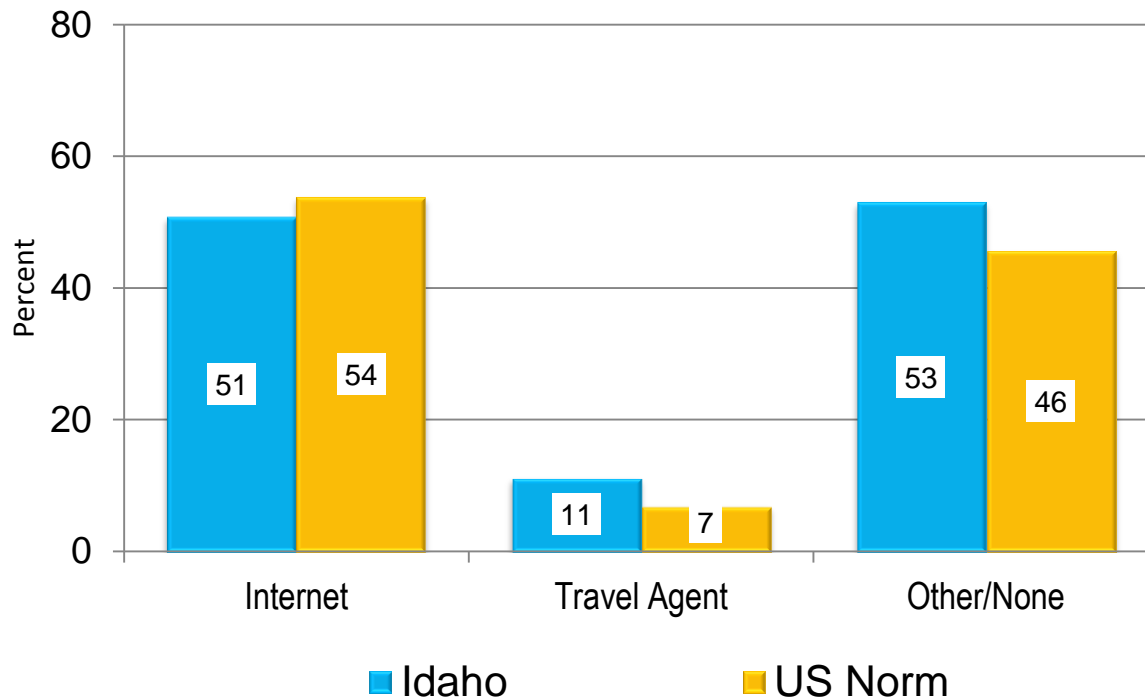




# Method of Planning Trip



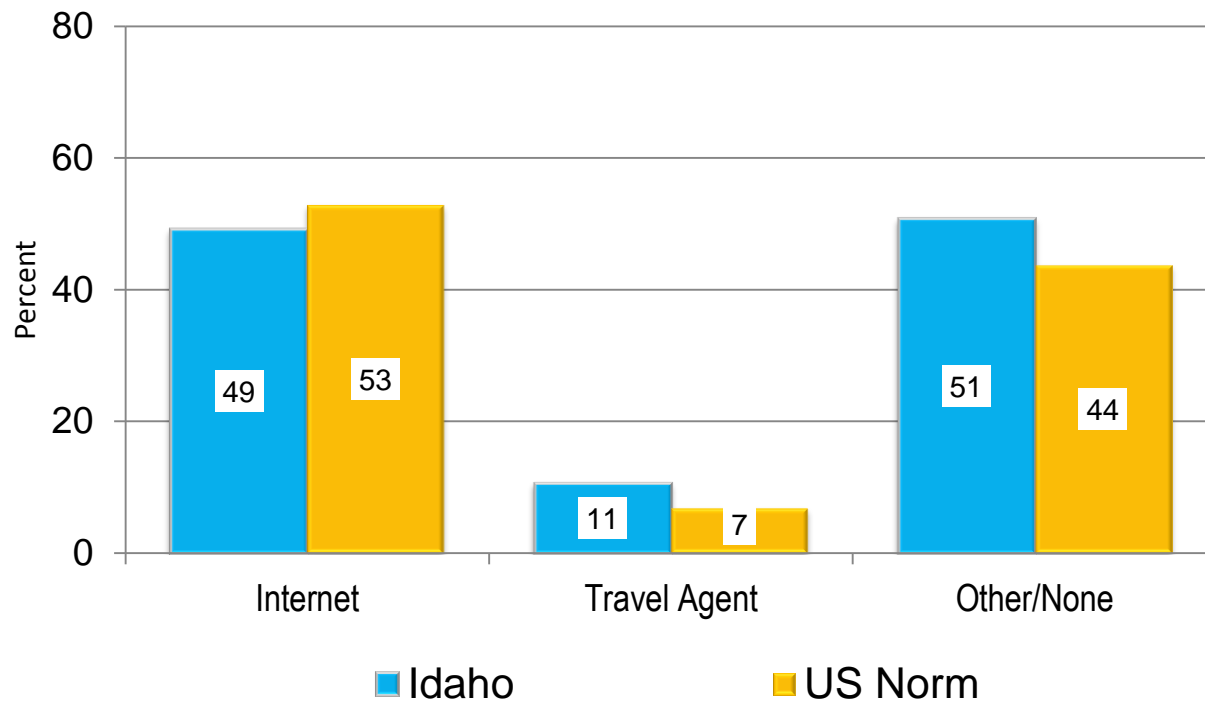
Base: Overnight Person-Trips



# Method of Booking Trip



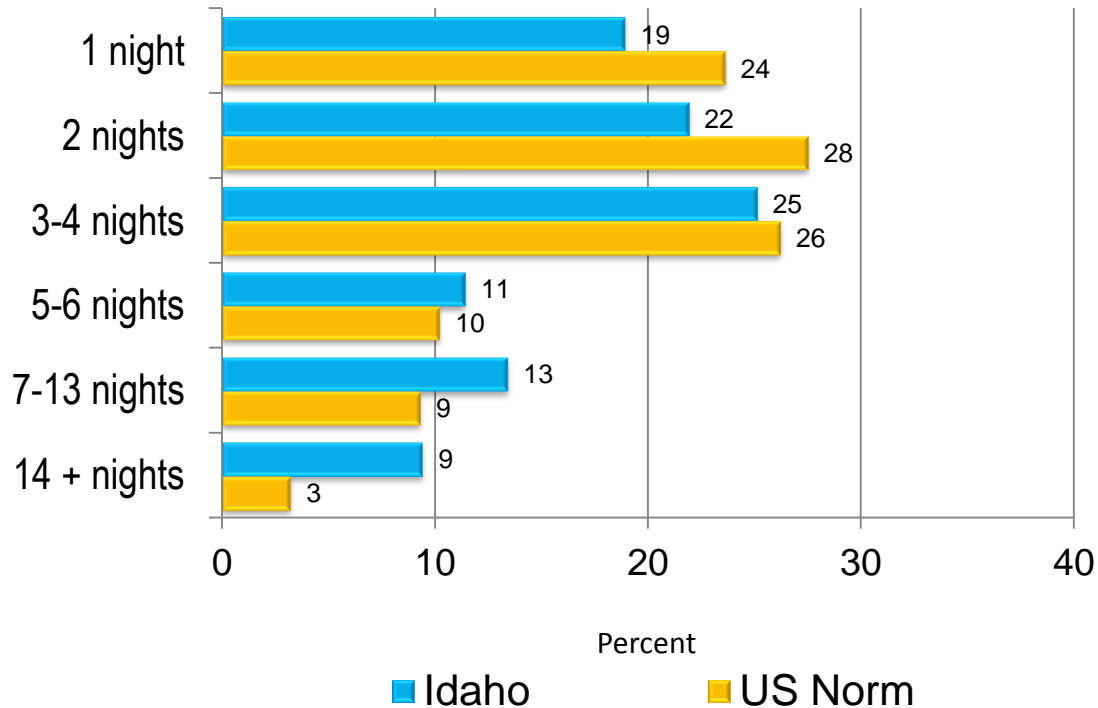
Base: Overnight Person-Trips



# Total Nights Away on Trip



Base: Overnight Person-Trips

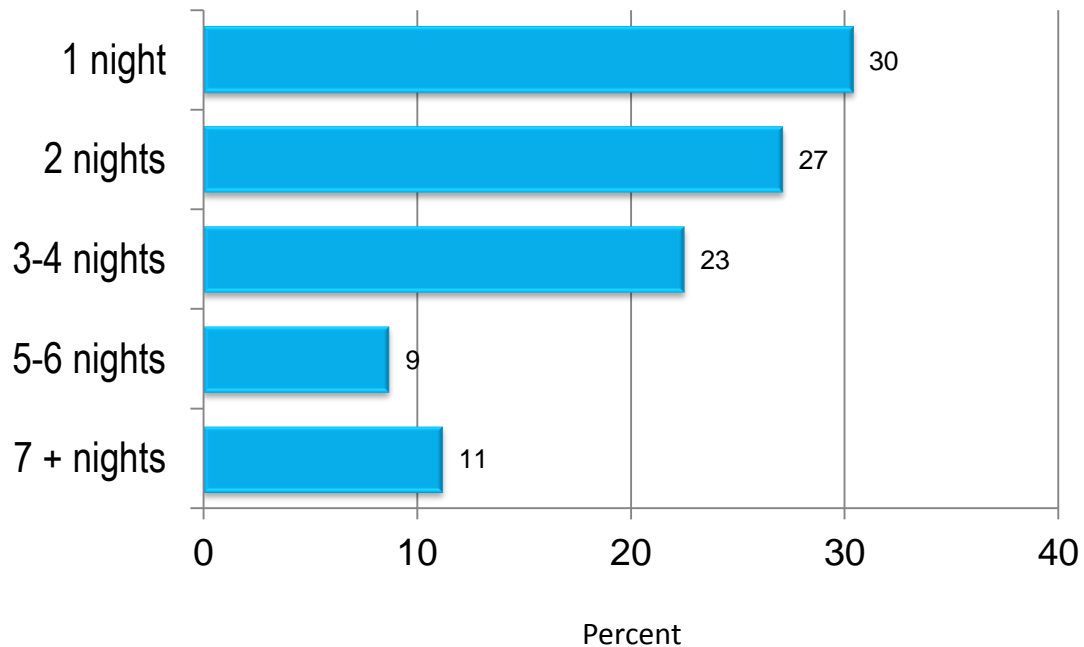


# Number of Nights Spent in Idaho



Base: Overnight Person-Trips with 1+ Nights Spent In Idaho

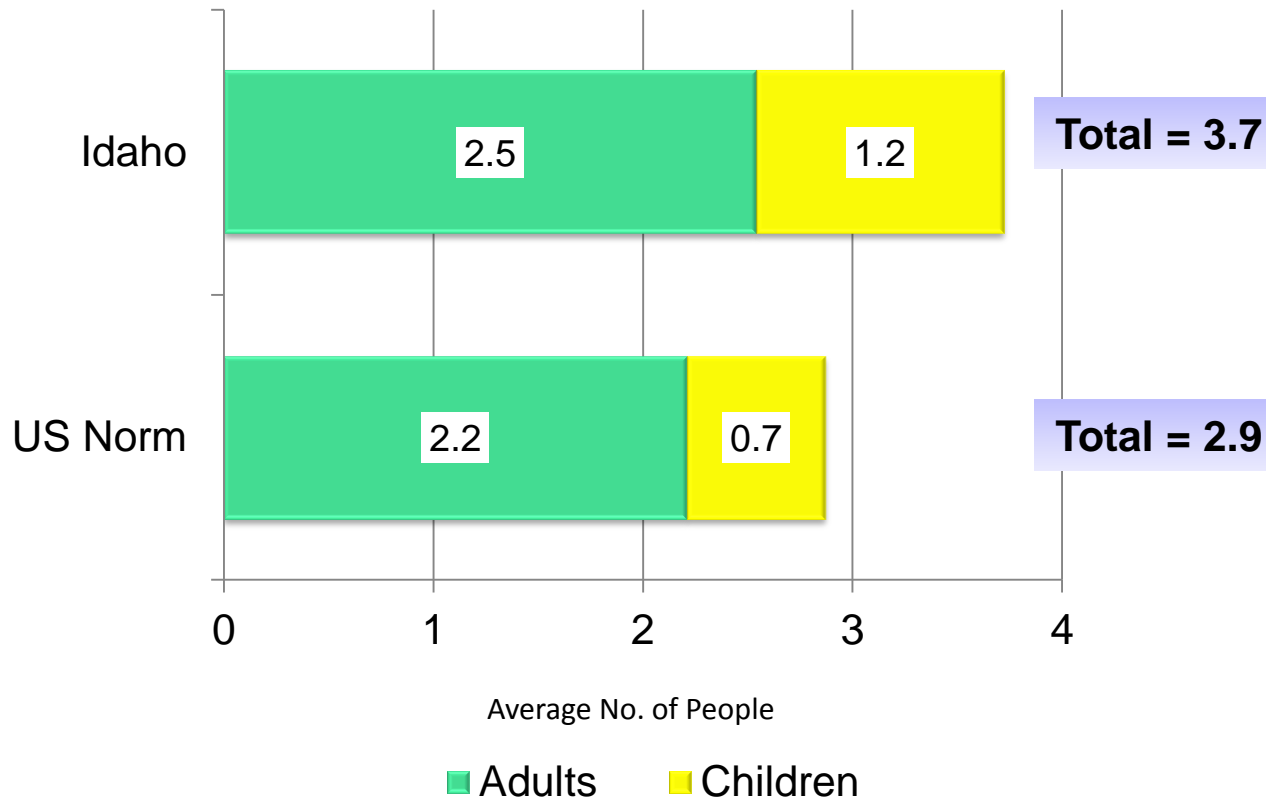
**Average Nights Spent in Idaho = 4.2**



# Size of Travel Party



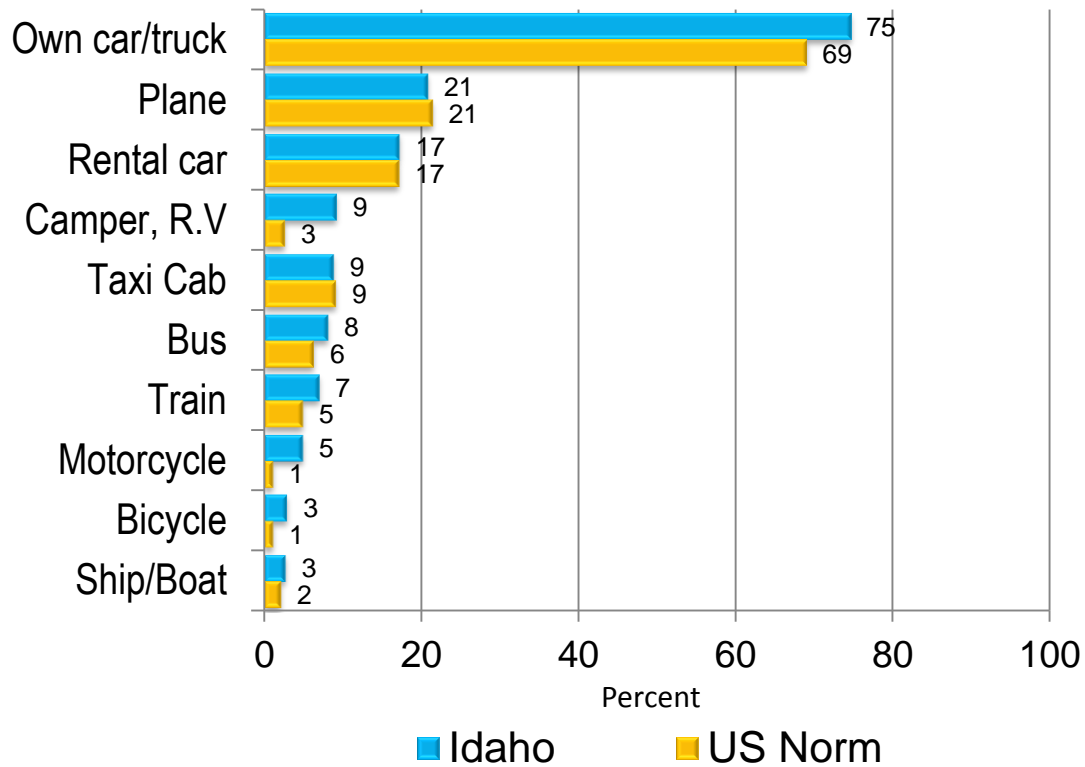
Base: Overnight Person-Trips



# Transportation



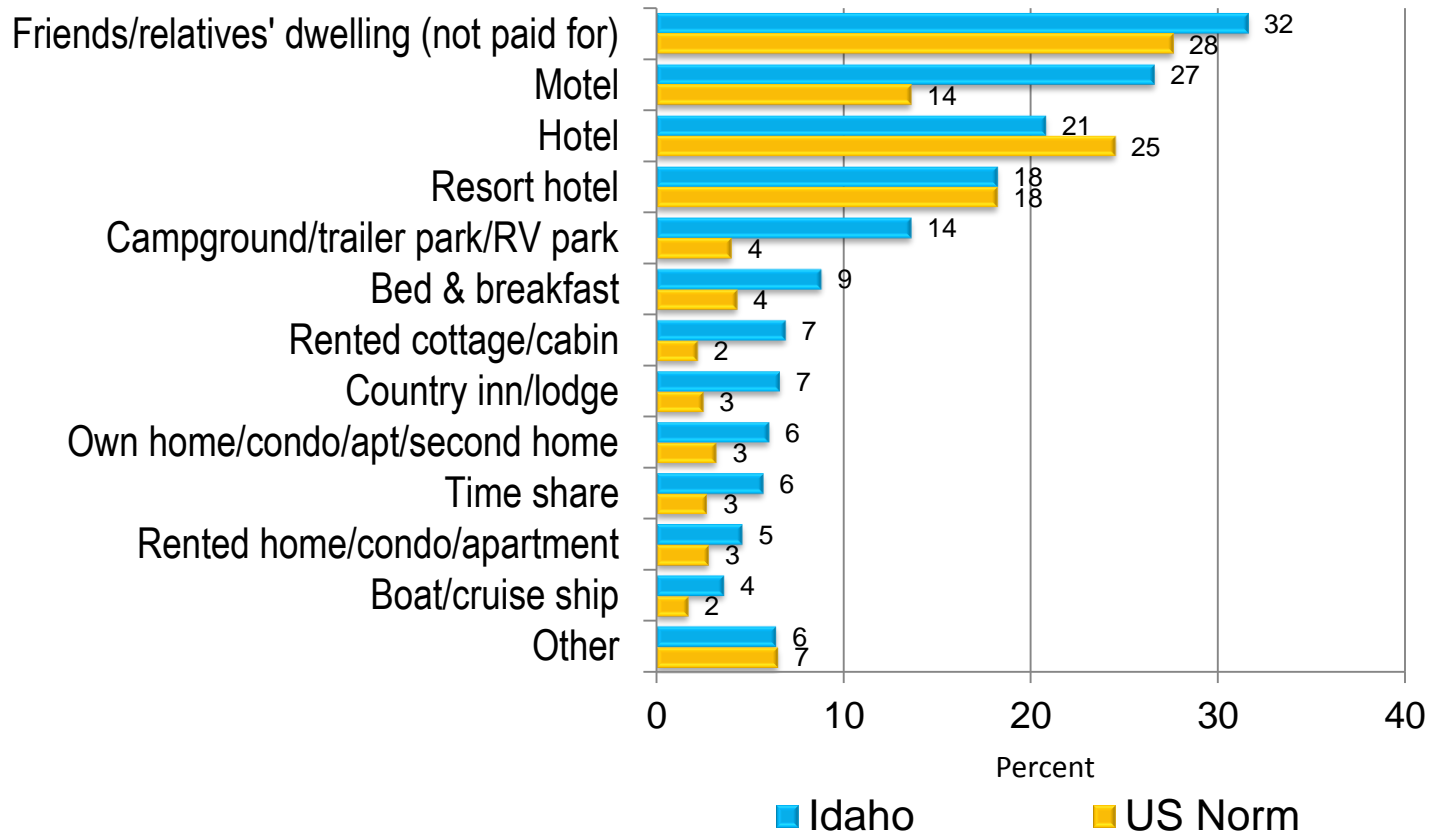
Base: Overnight Person-Trips



# Accommodation



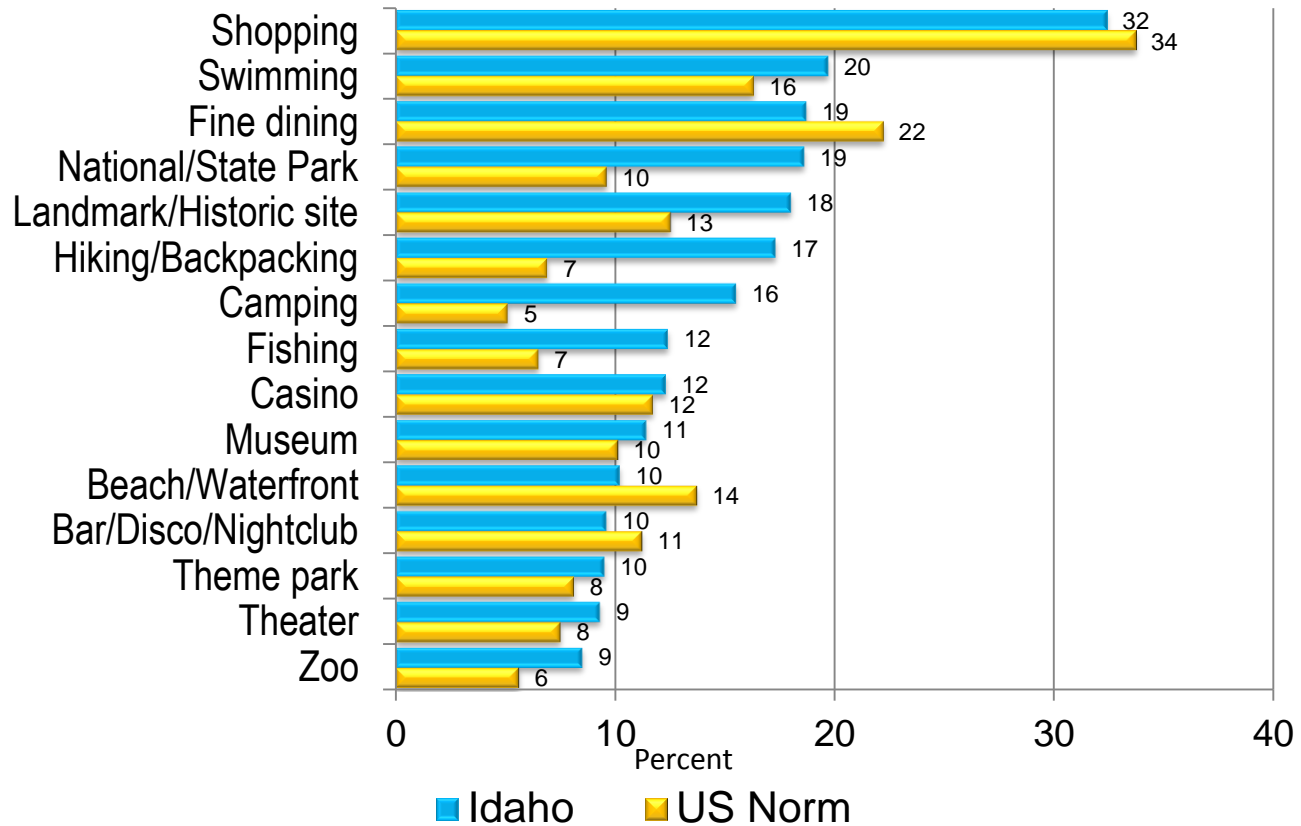
Base: Overnight Person-Trips



# Activities and Experiences



Base: Overnight Person-Trips

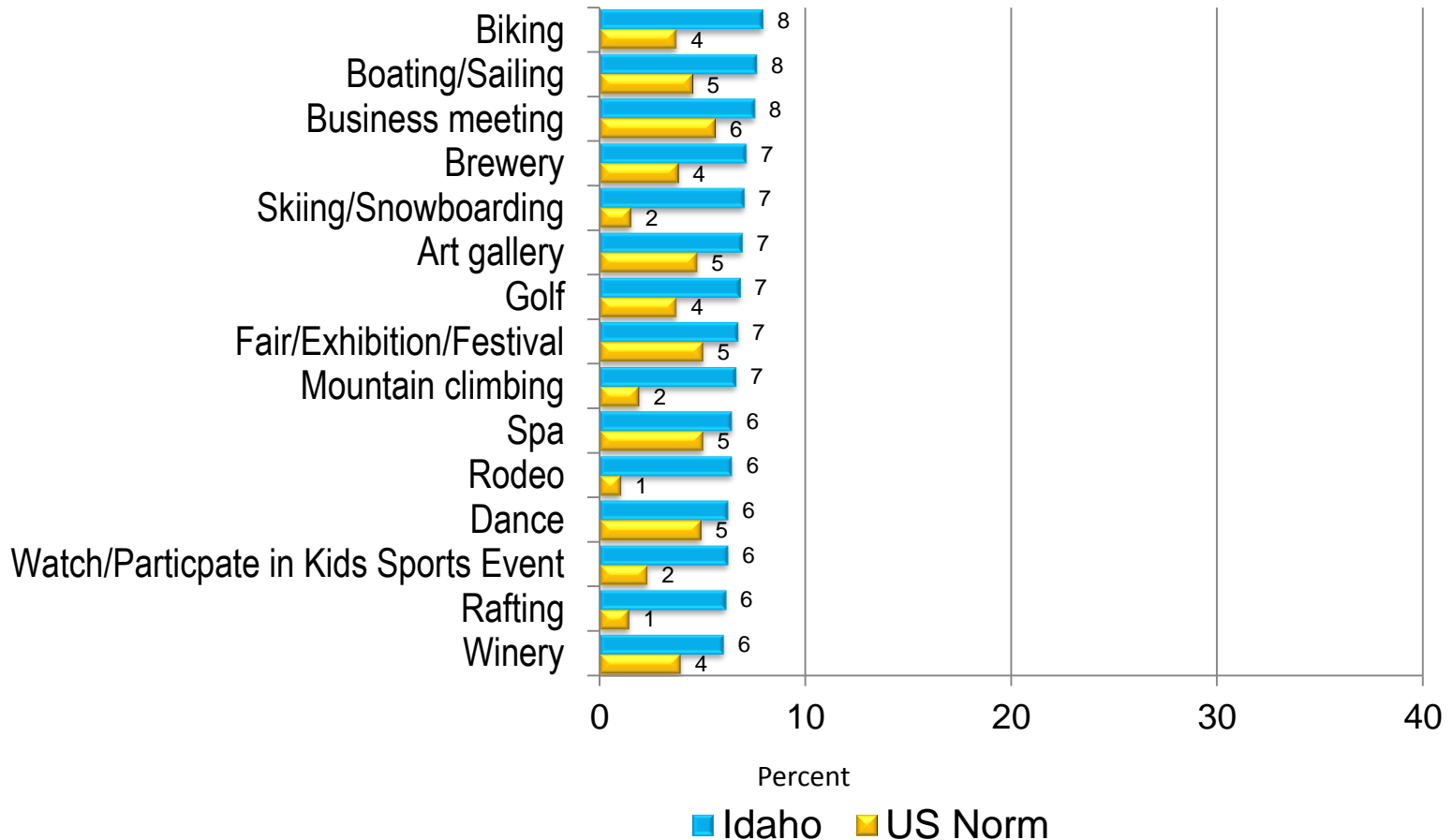




# Activities and Experiences (Cont'd)



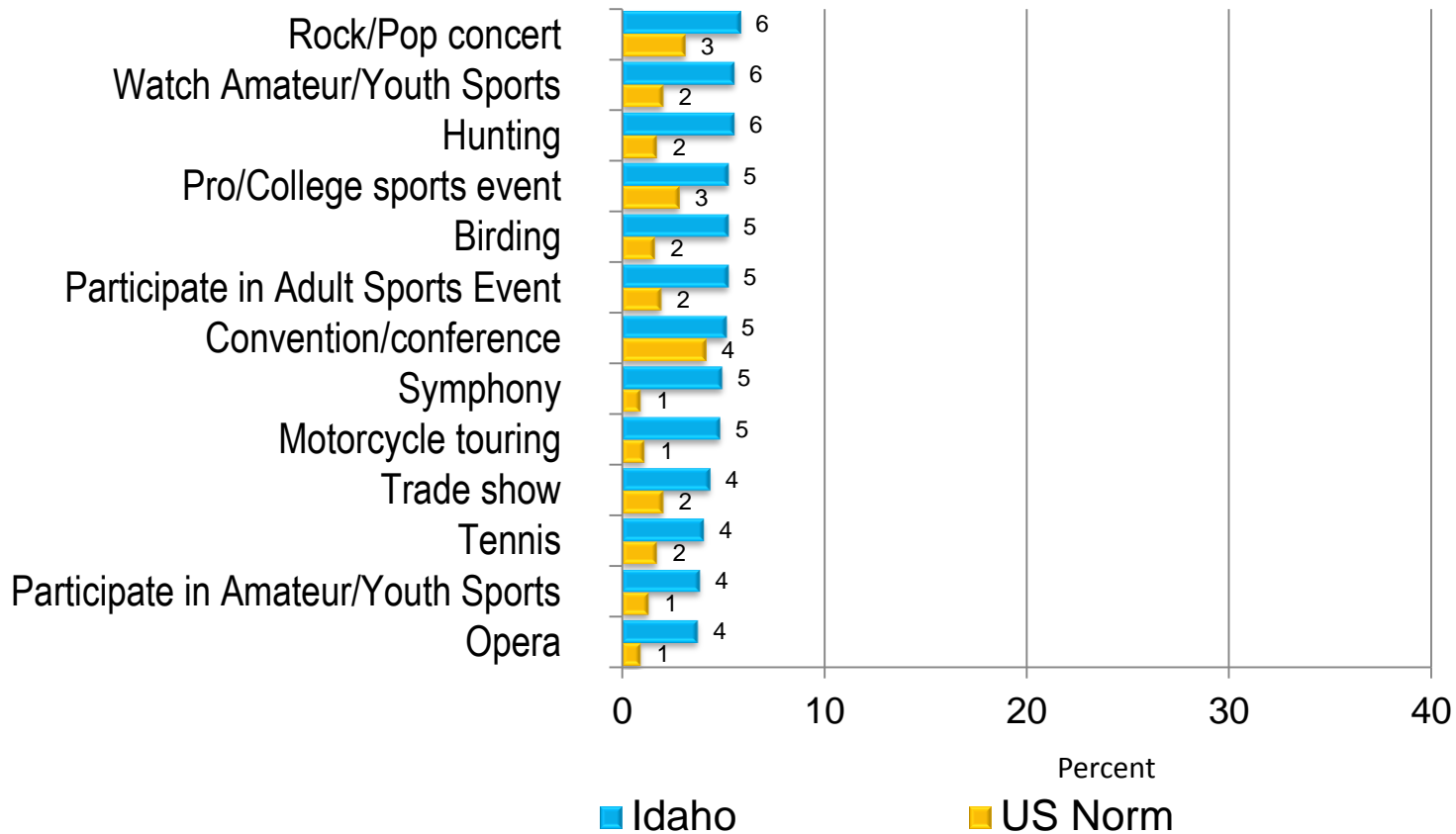
Base: Overnight Person-Trips



# Activities and Experiences (Cont'd)



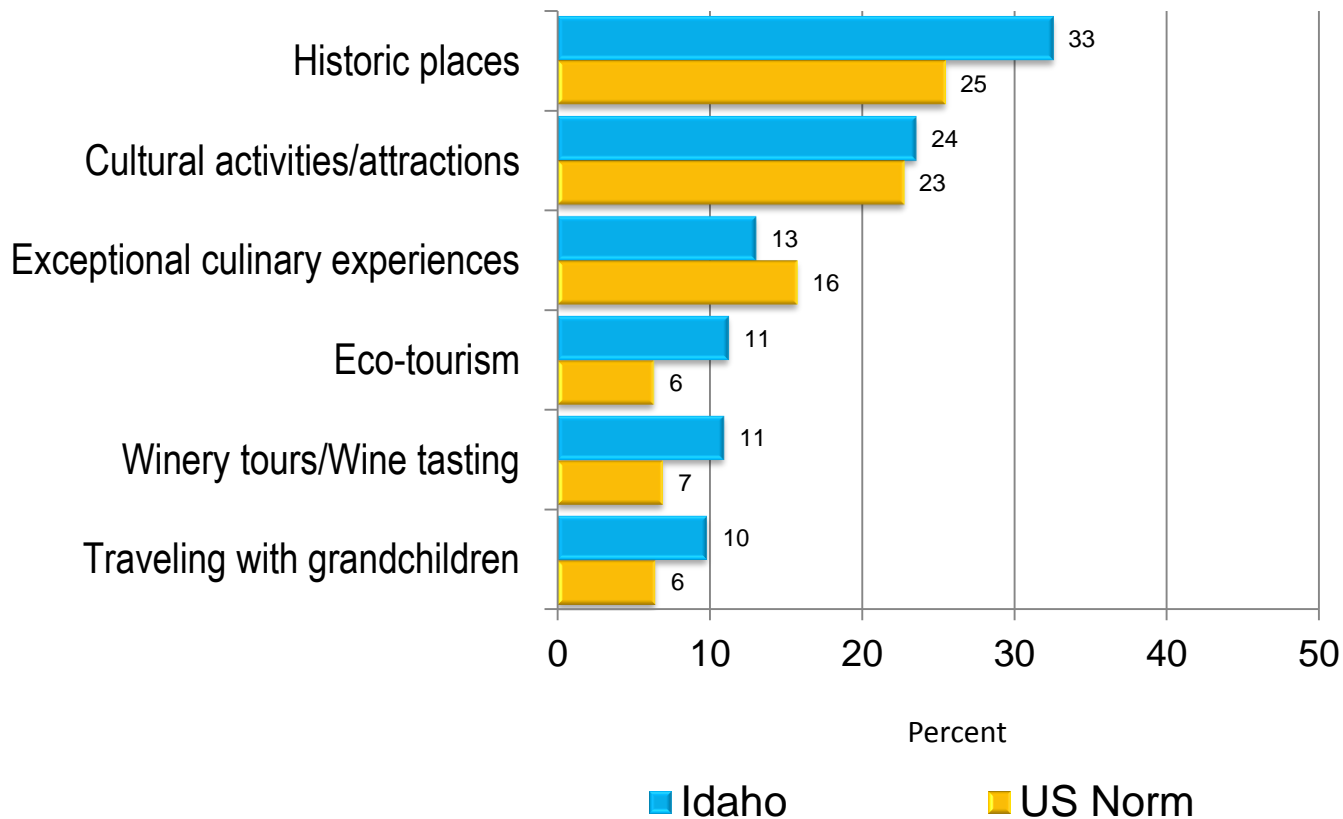
Base: Overnight Person-Trips



# Activities of Special Interest



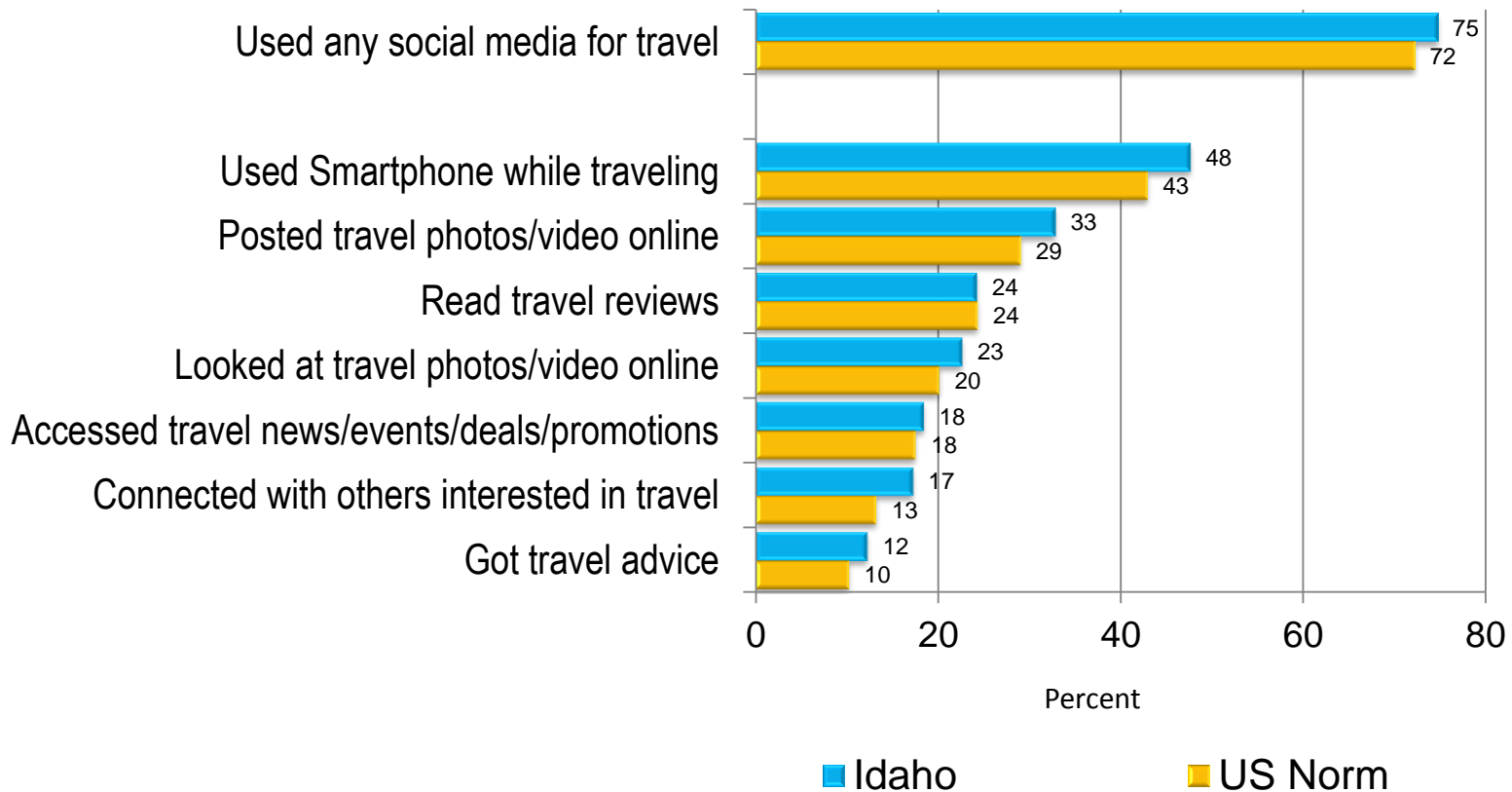
Base: Overnight Person-Trips



# Online Social Media Use by Travelers



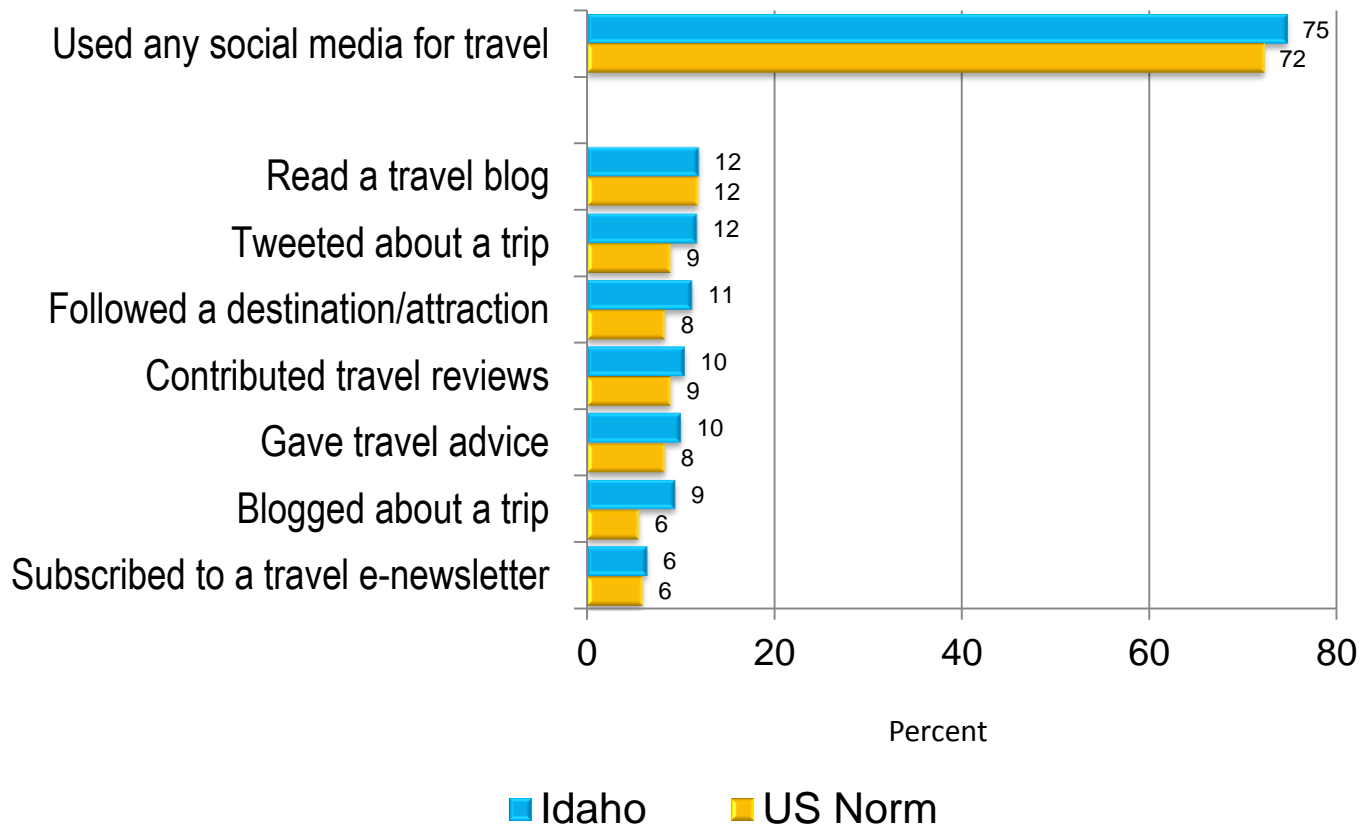
Base: Overnight Person-Trips



# Online Social Media Use by Travelers (Cont'd)



Base: Overnight Person-Trips





# Day Trip Detail

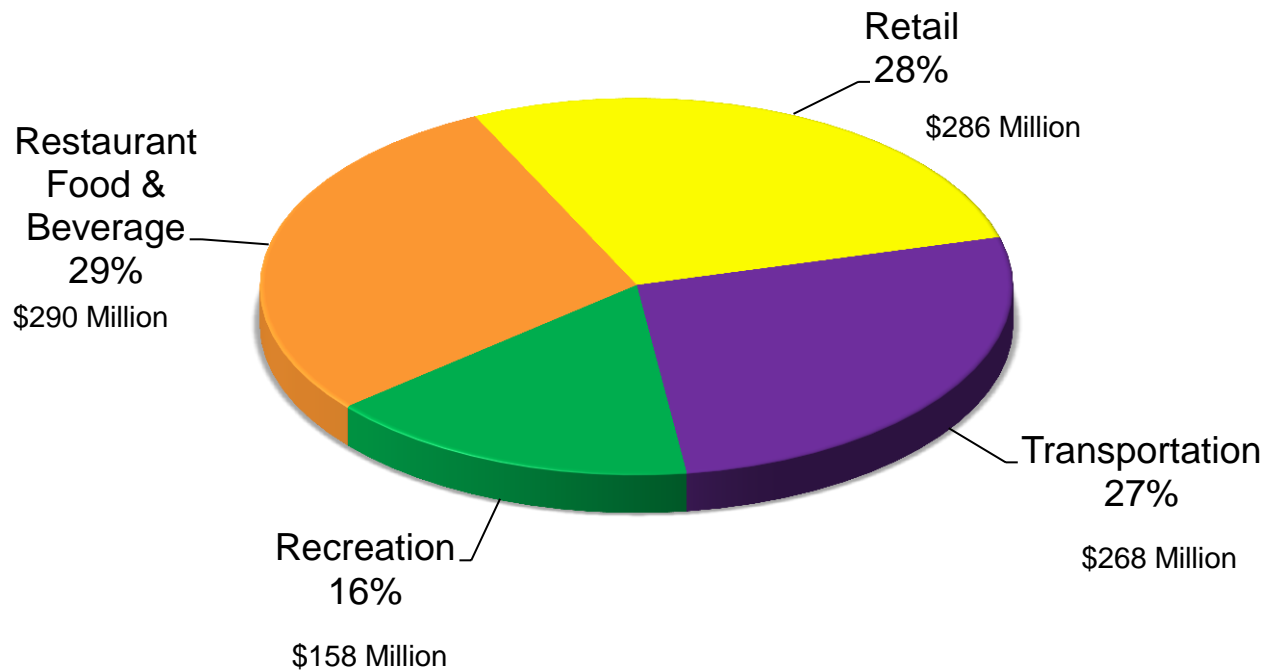


# Day Trip Expenditures

# Total Day Trip Spending – by Sector



**Total Spending = \$1 Billion**

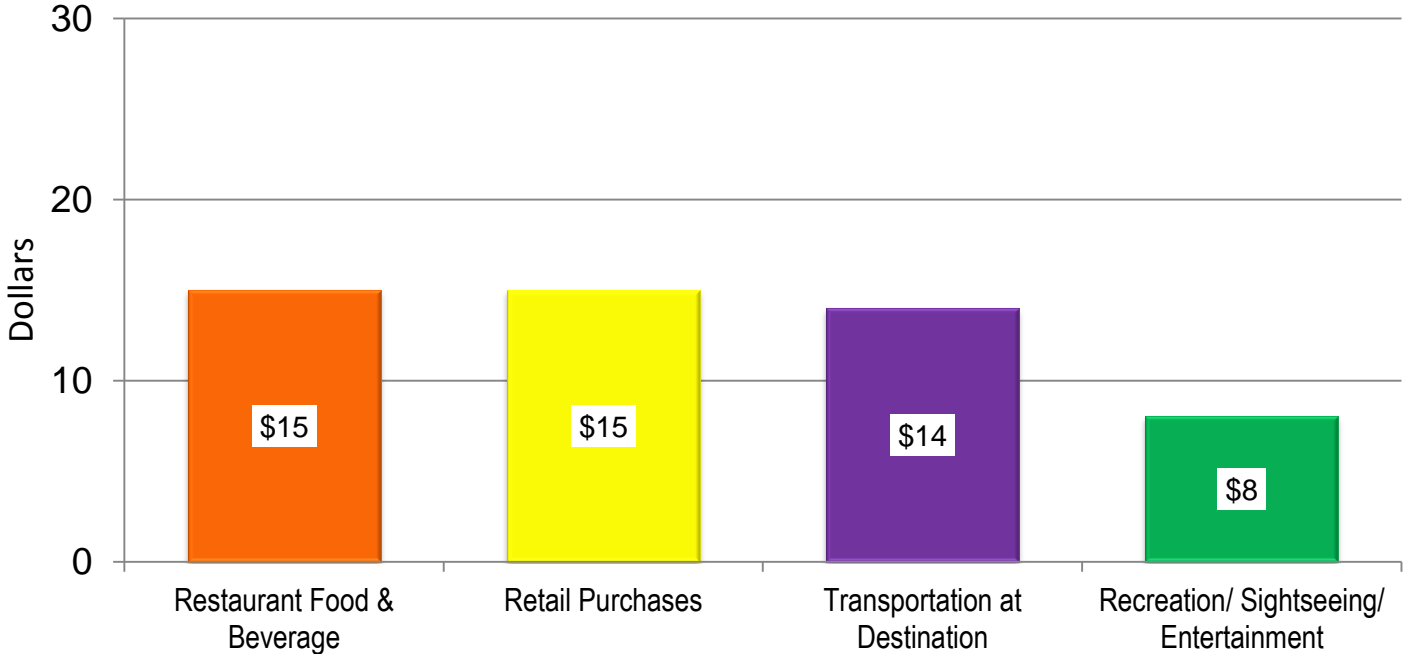




# Average Per Person Expenditures on Day Trips — By Sector



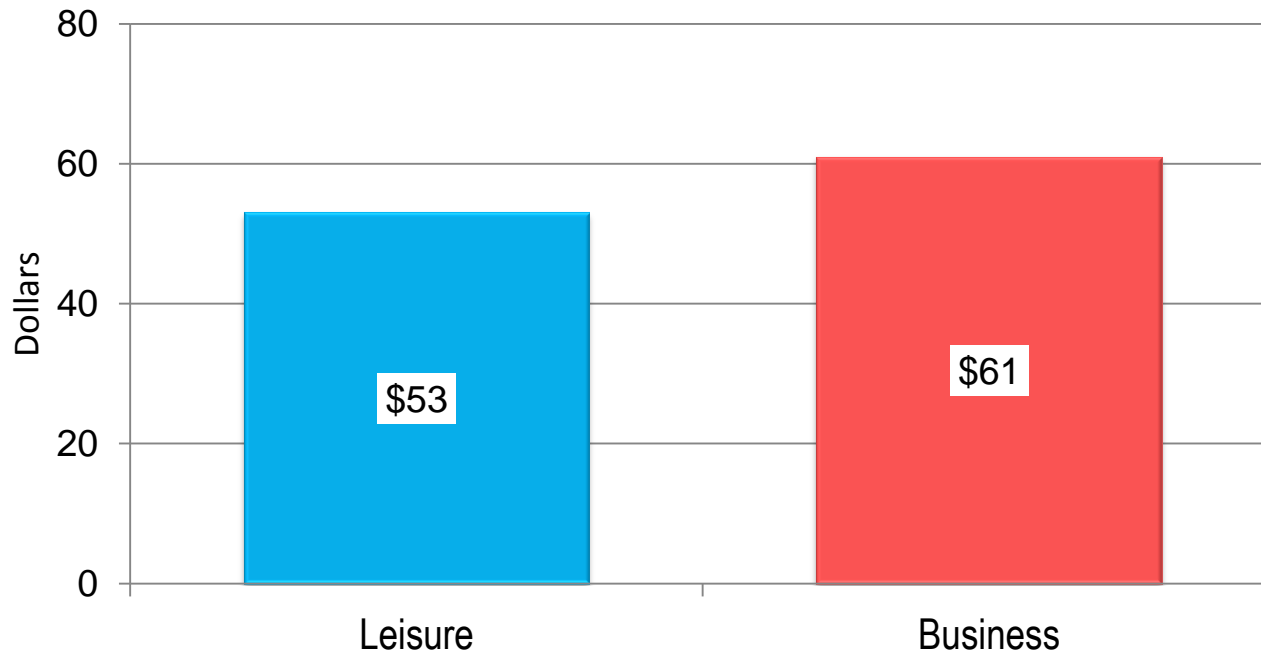
Base: Total Day Person-Trips



# Average Per Person Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips





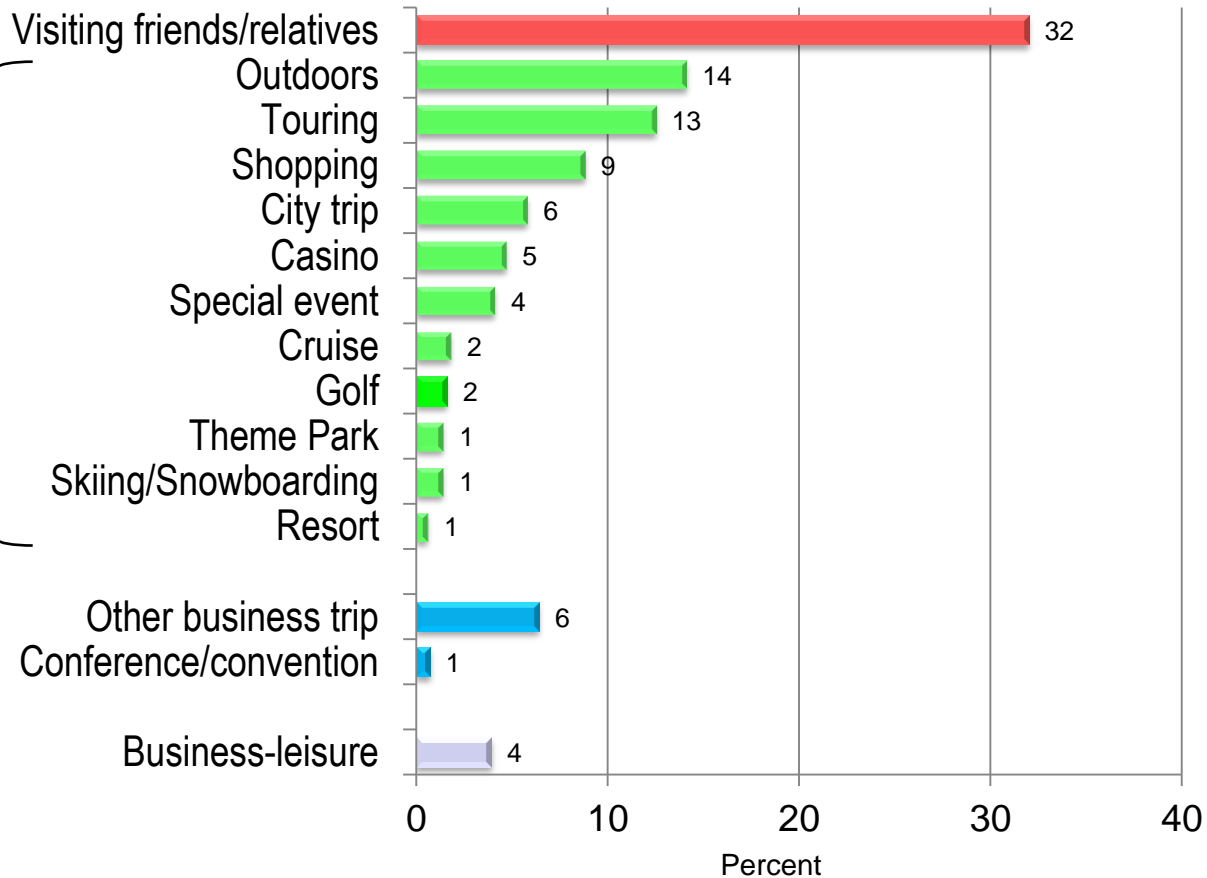
# Day Trip Characteristics

# Main Purpose of Trip



Base: Day Person-Trips to Idaho

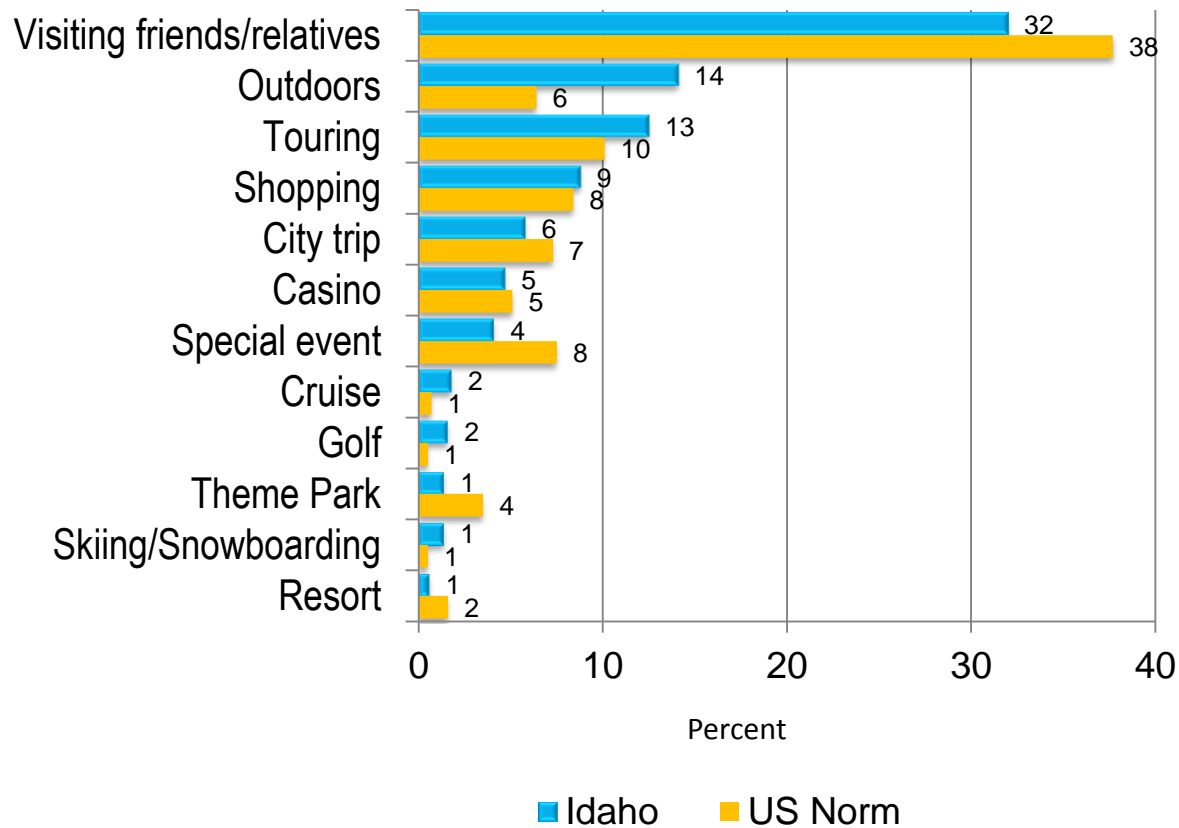
**Marketable  
Trips**



# Main Purpose of Leisure Trip — Idaho vs. National Norm



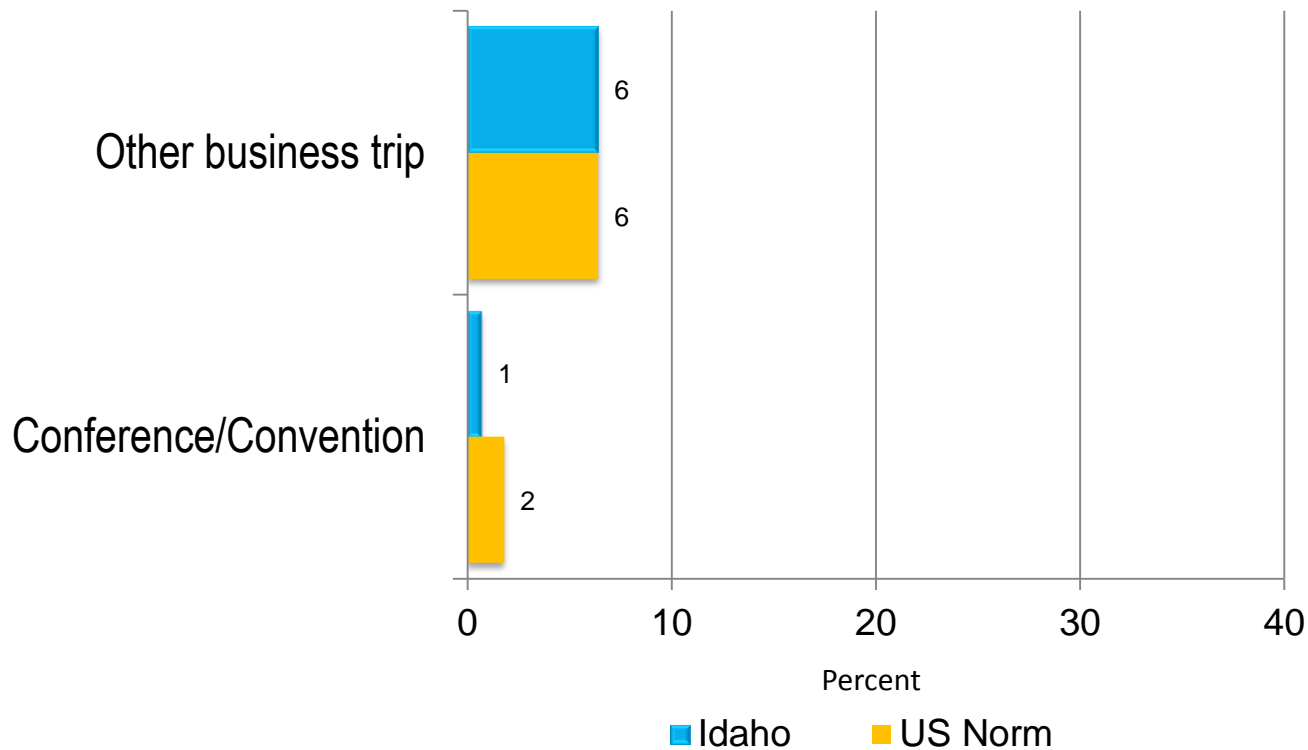
Base: Day Person-Trips



# Main Purpose of Business Trip — Idaho vs. National Norm



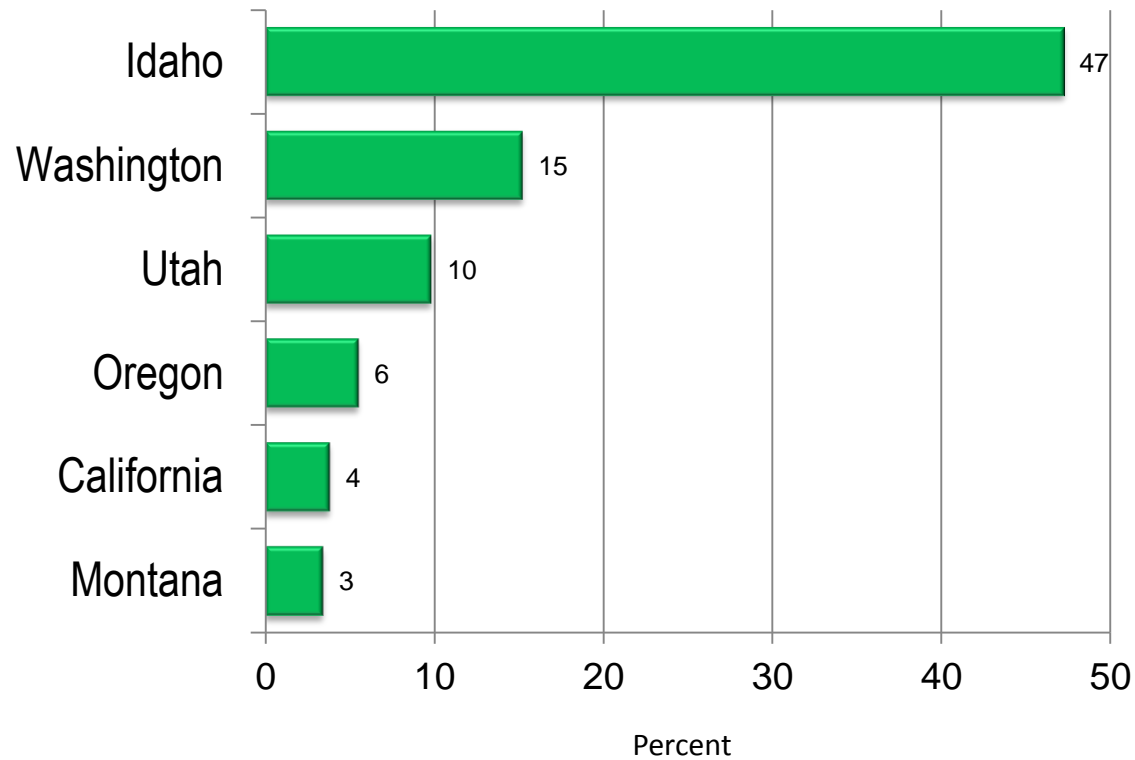
Base: Day Person-Trips



# State Origin Of Trip



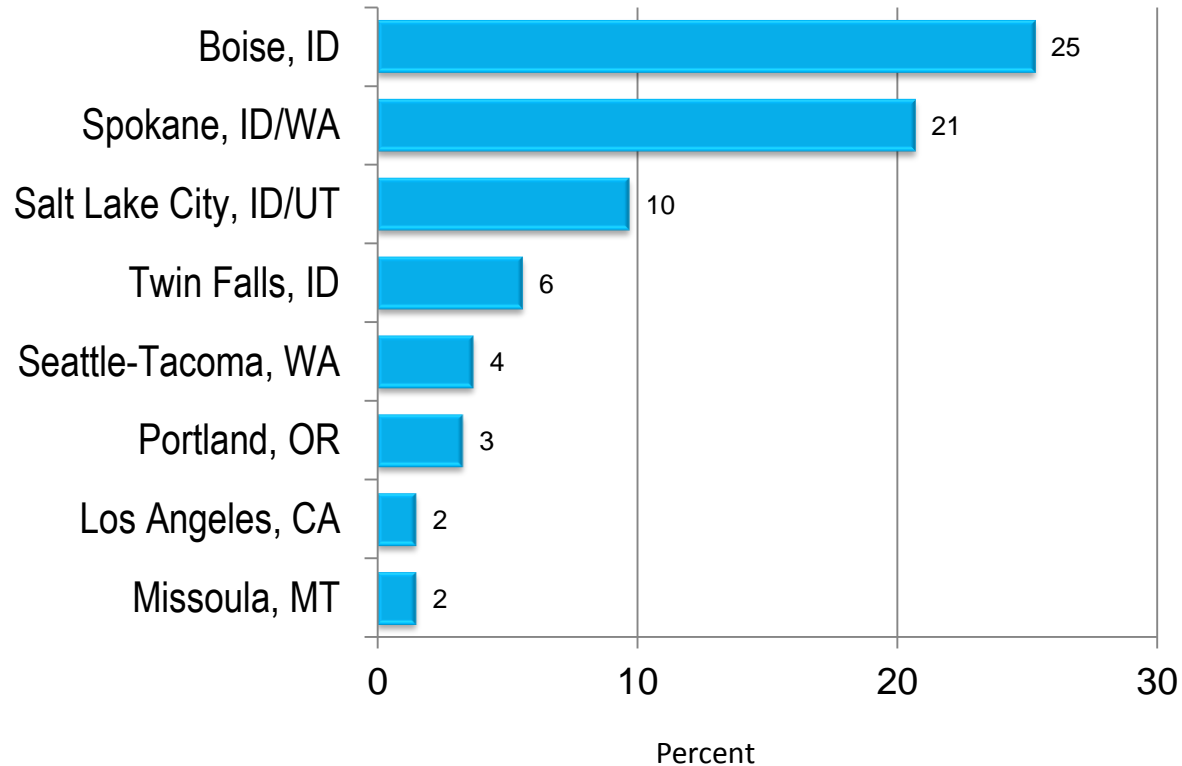
Base: Day Person-Trips to Idaho



# DMA Origin Of Trip



Base: Day Person-Trips to Idaho

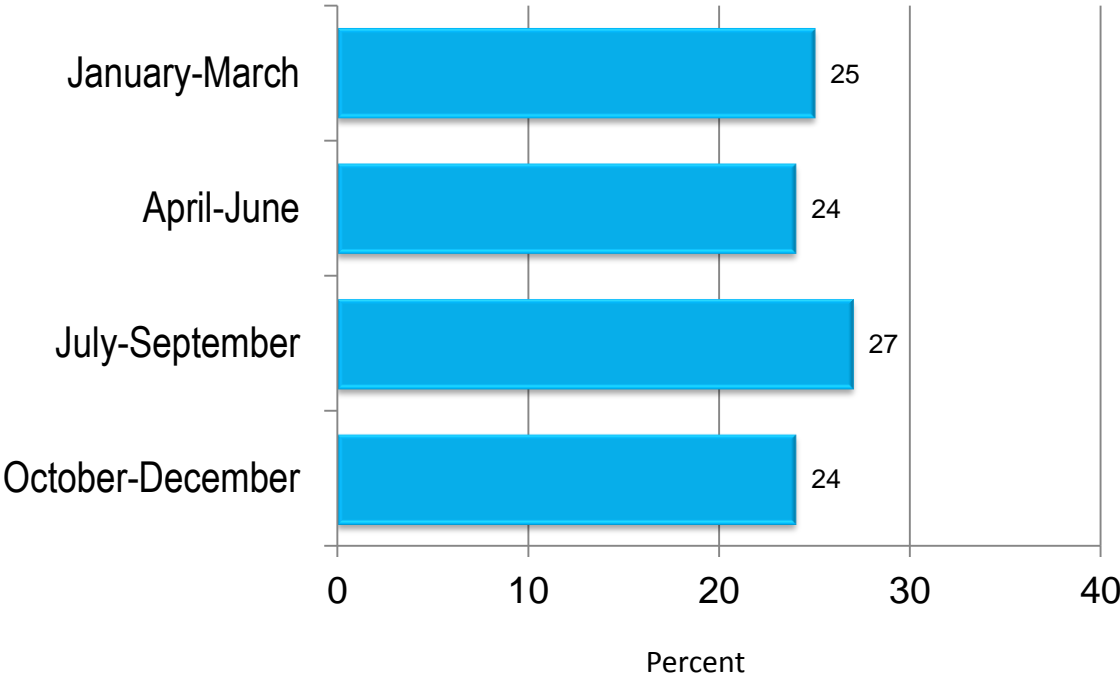




# Season of Trip



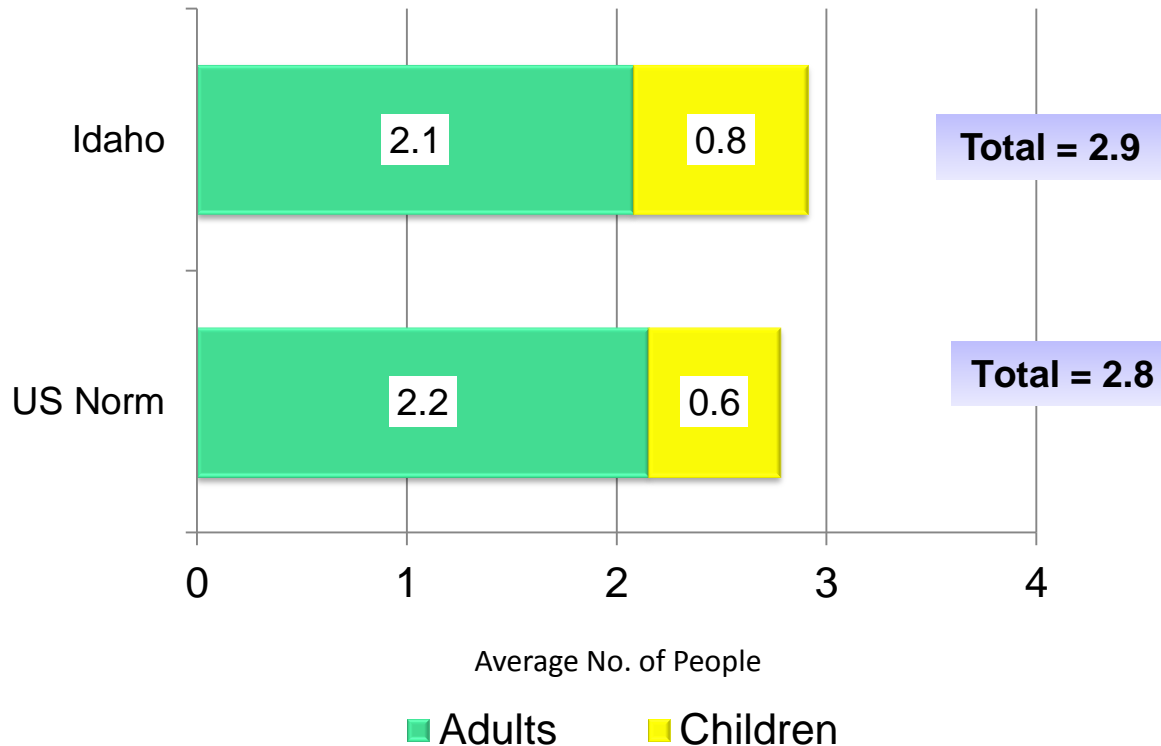
Base: Day Person-Trips to Idaho



# Size of Travel Party



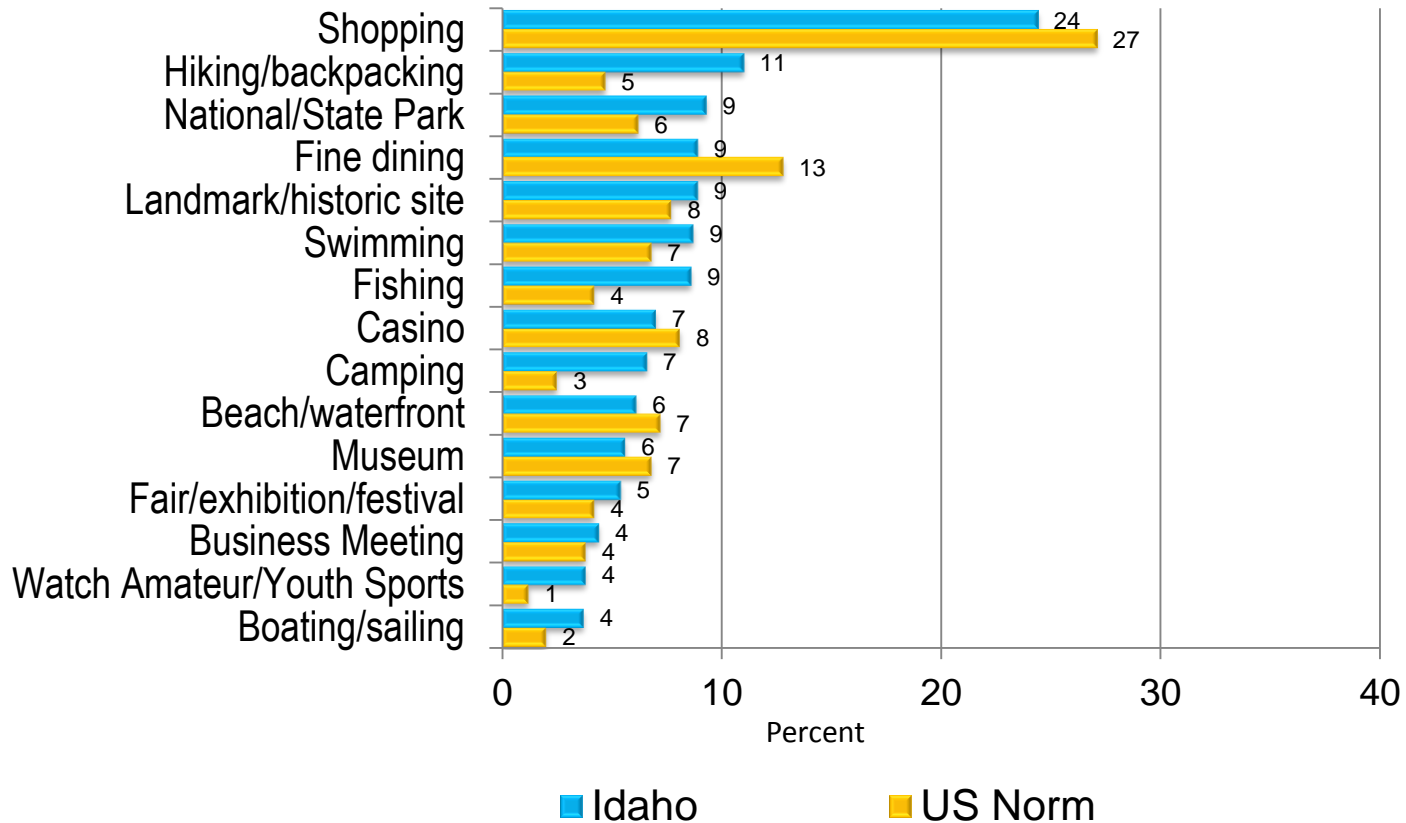
Base: Day Person-Trips



# Activities and Experiences



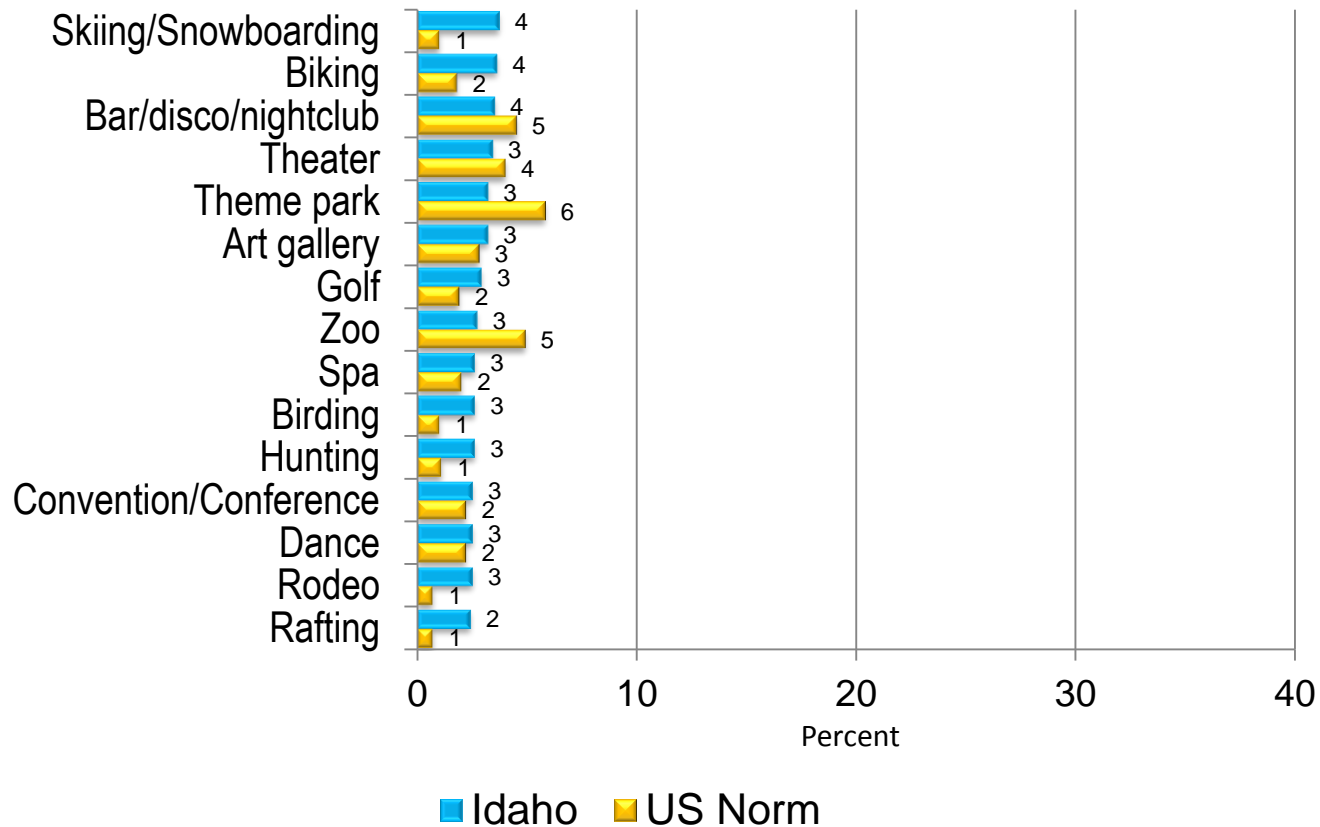
Base: Day Person-Trips



# Activities and Experiences (Cont'd)



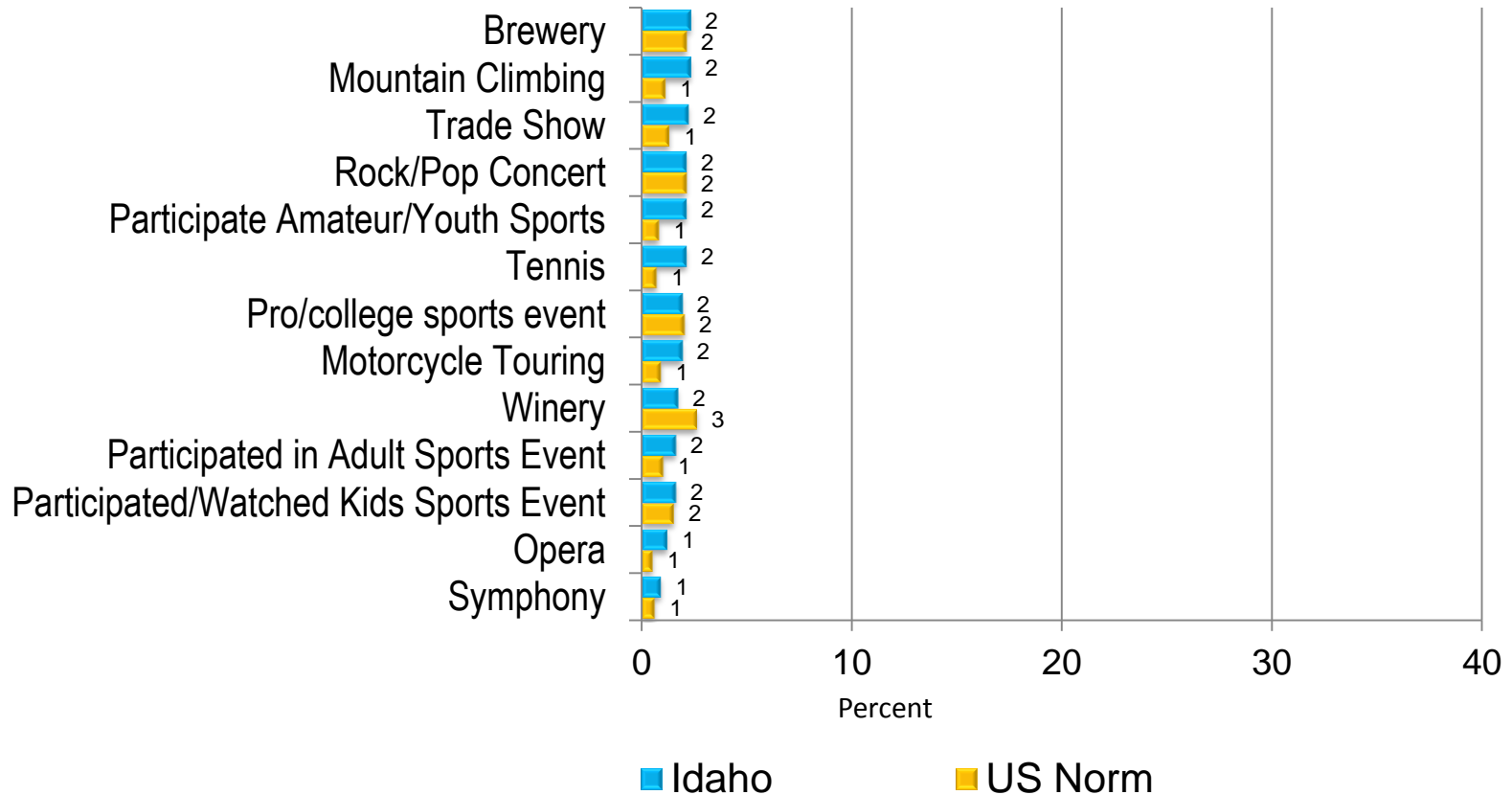
Base: Day Person-Trips



# Activities and Experiences (Cont'd)



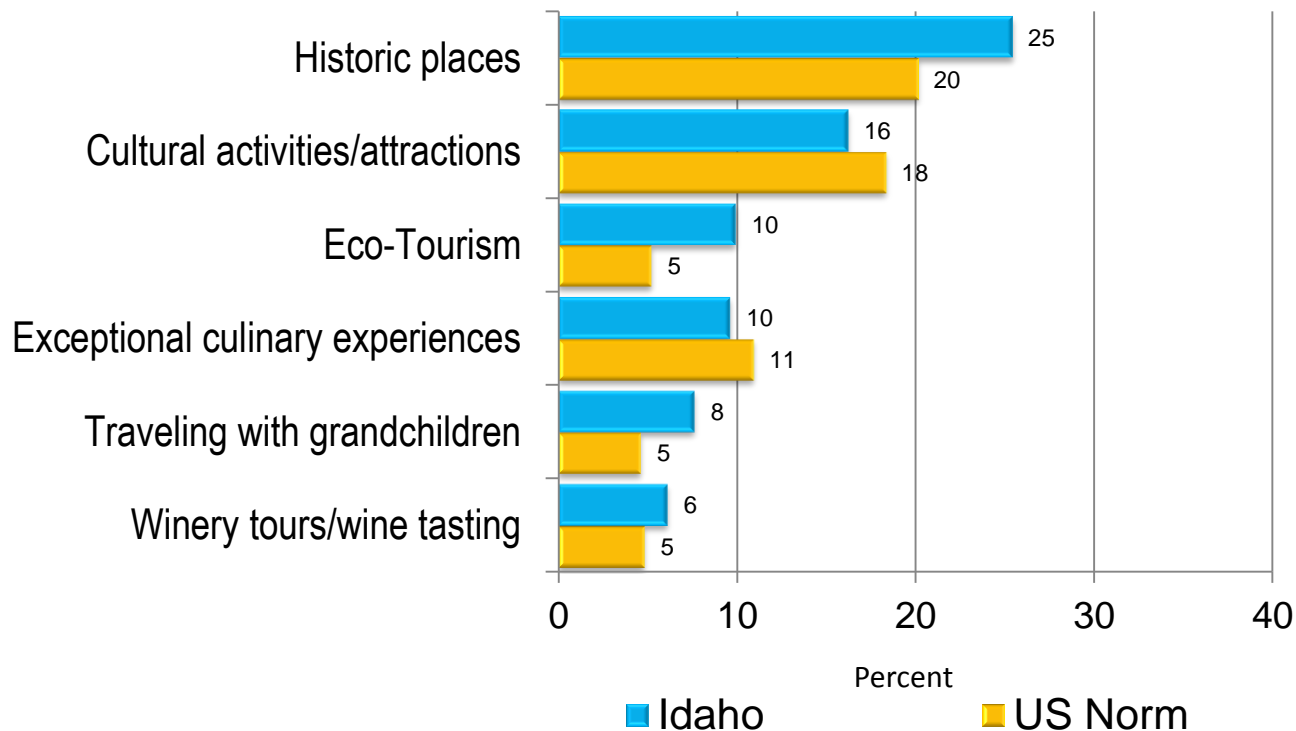
Base: Day Person-Trips



# Activities of Special Interest



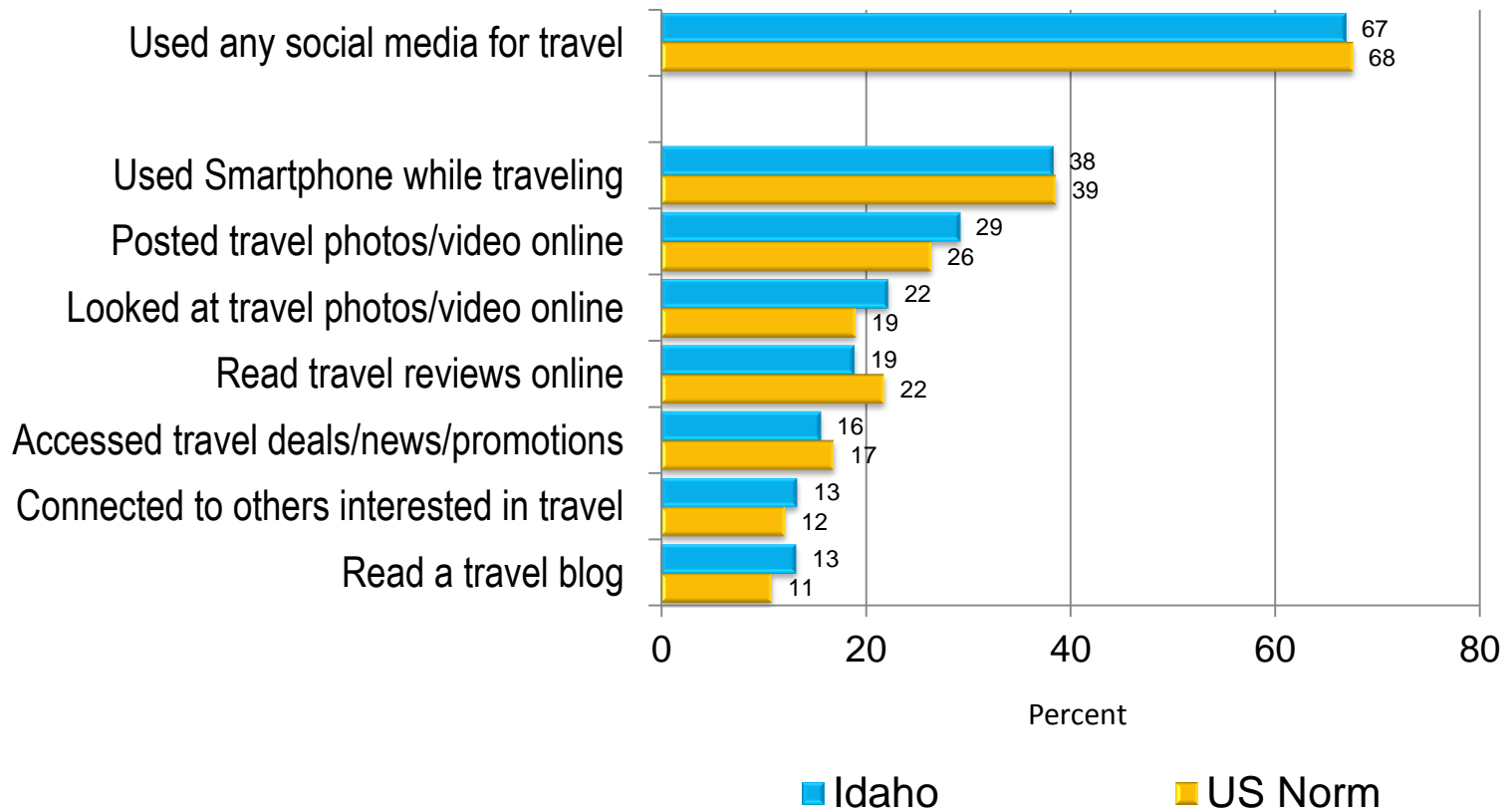
Base: Day Person-Trips



# Social Media Use by Travelers



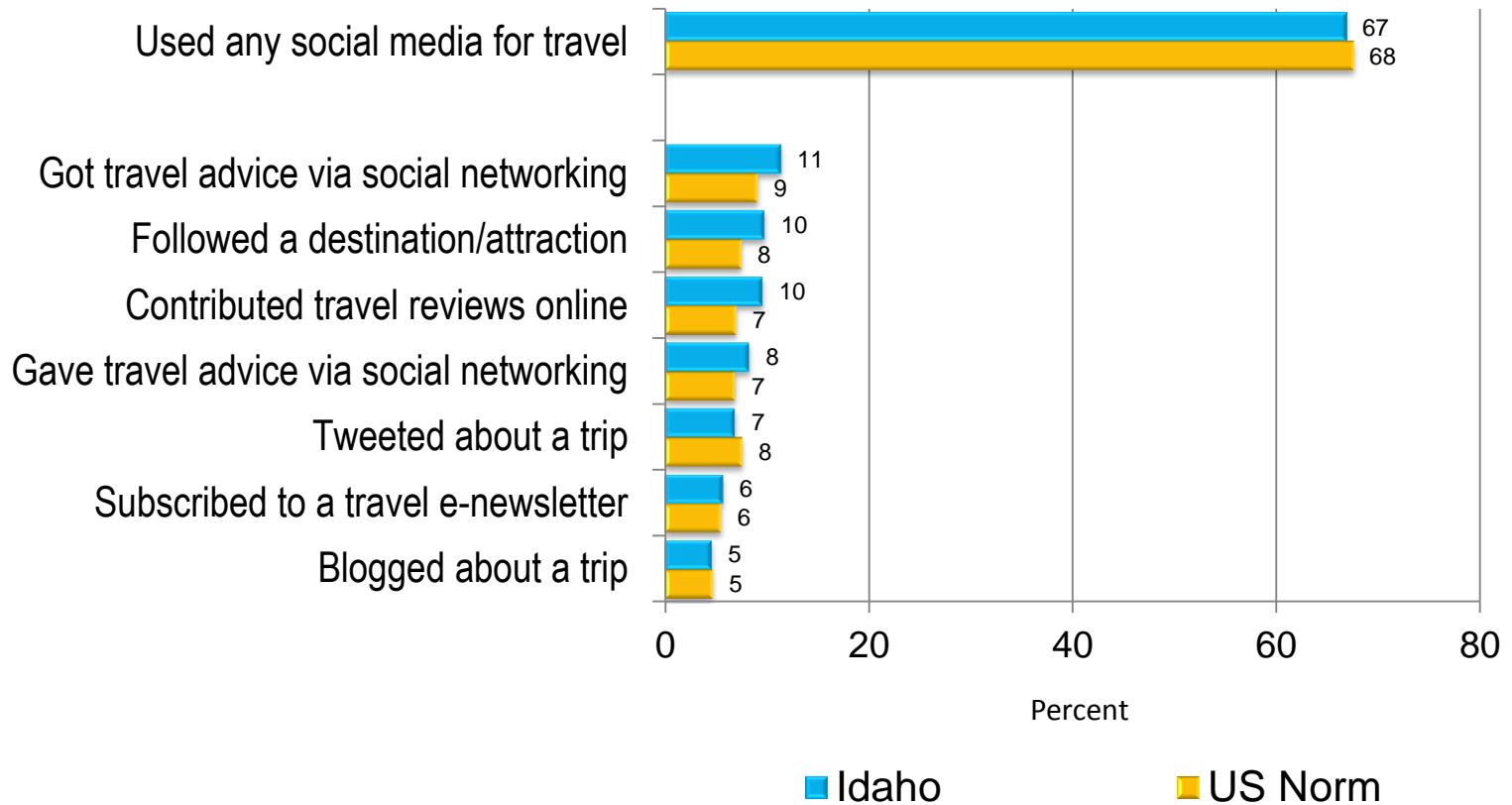
Base: Day Person-Trips



# Social Media Use by Travelers (Cont'd)



Base: Day Person-Trips





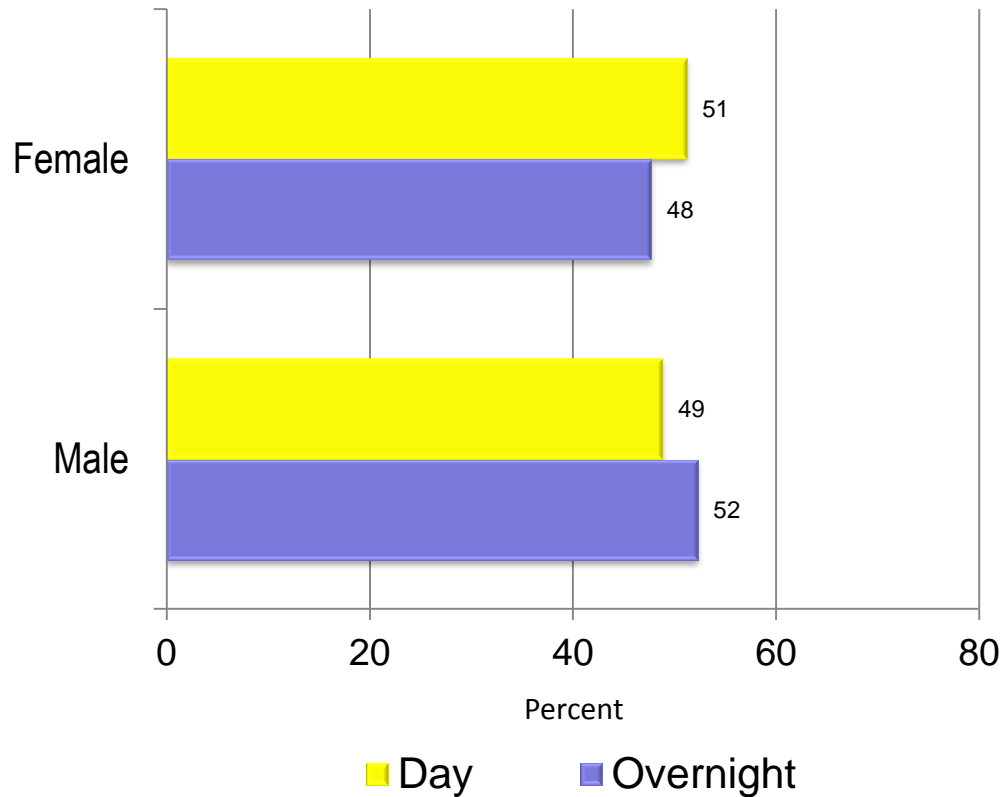


# Demographic Profile of Visitors to Idaho

# Gender



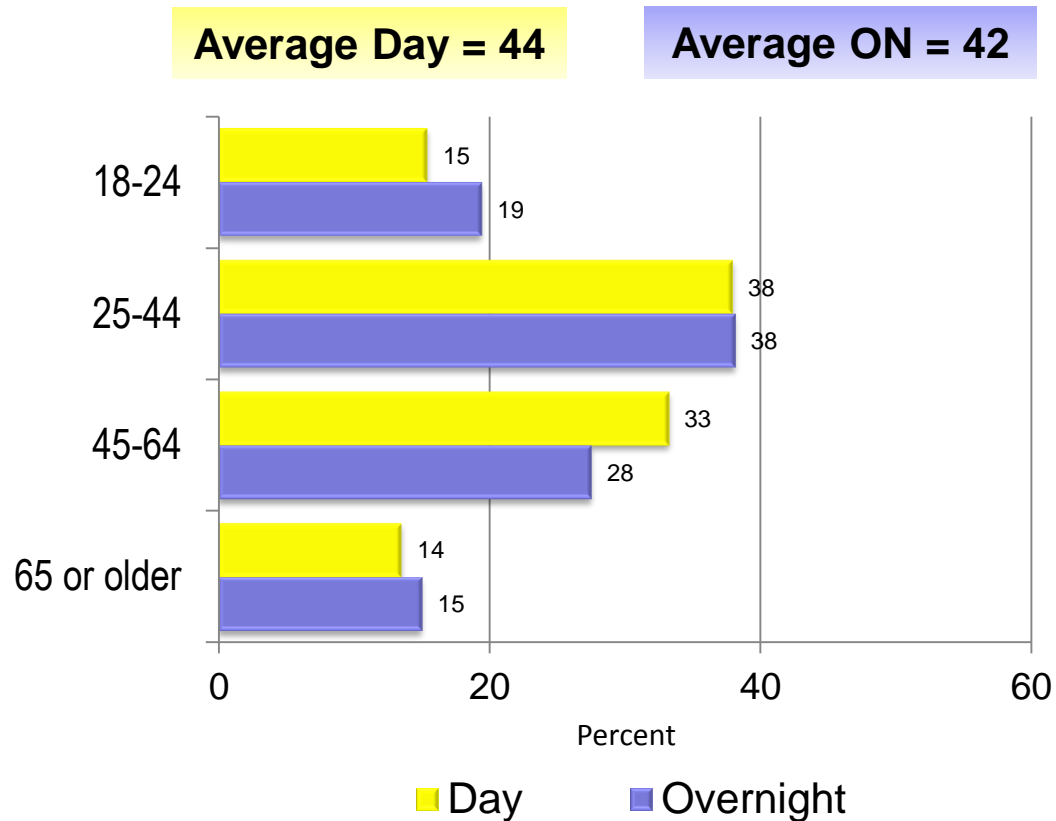
Base: Total Person-Trips to Idaho



# Age



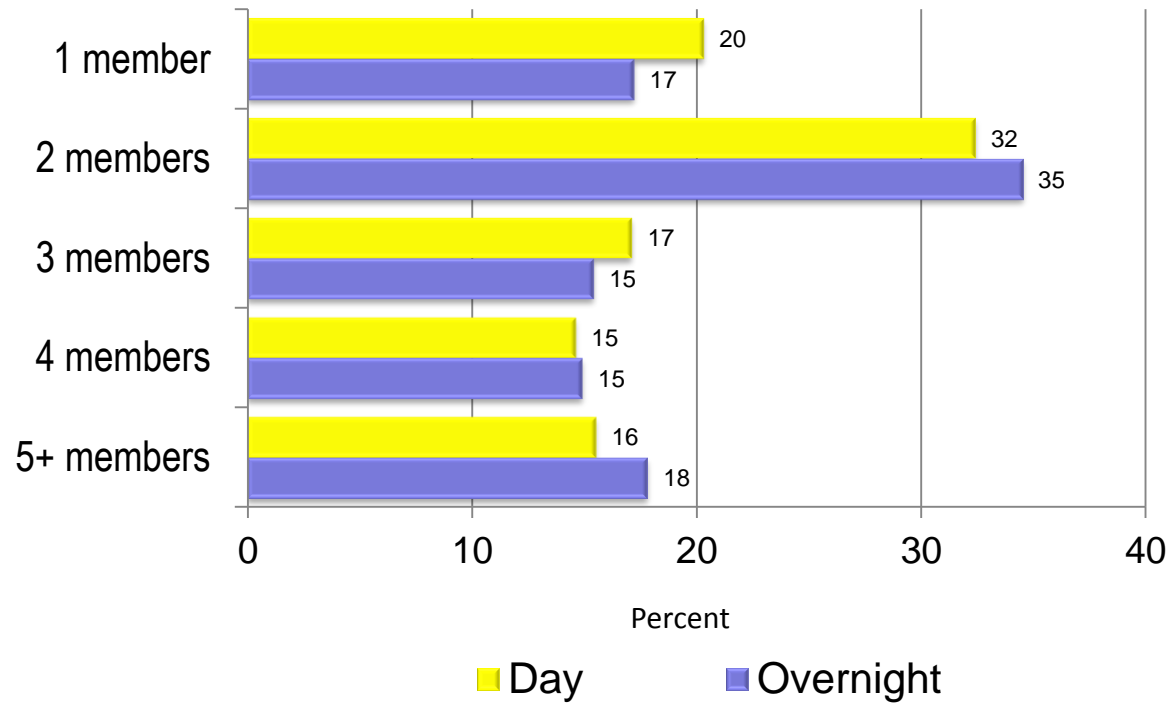
Base: Total Person-Trips to Idaho



# Household Size



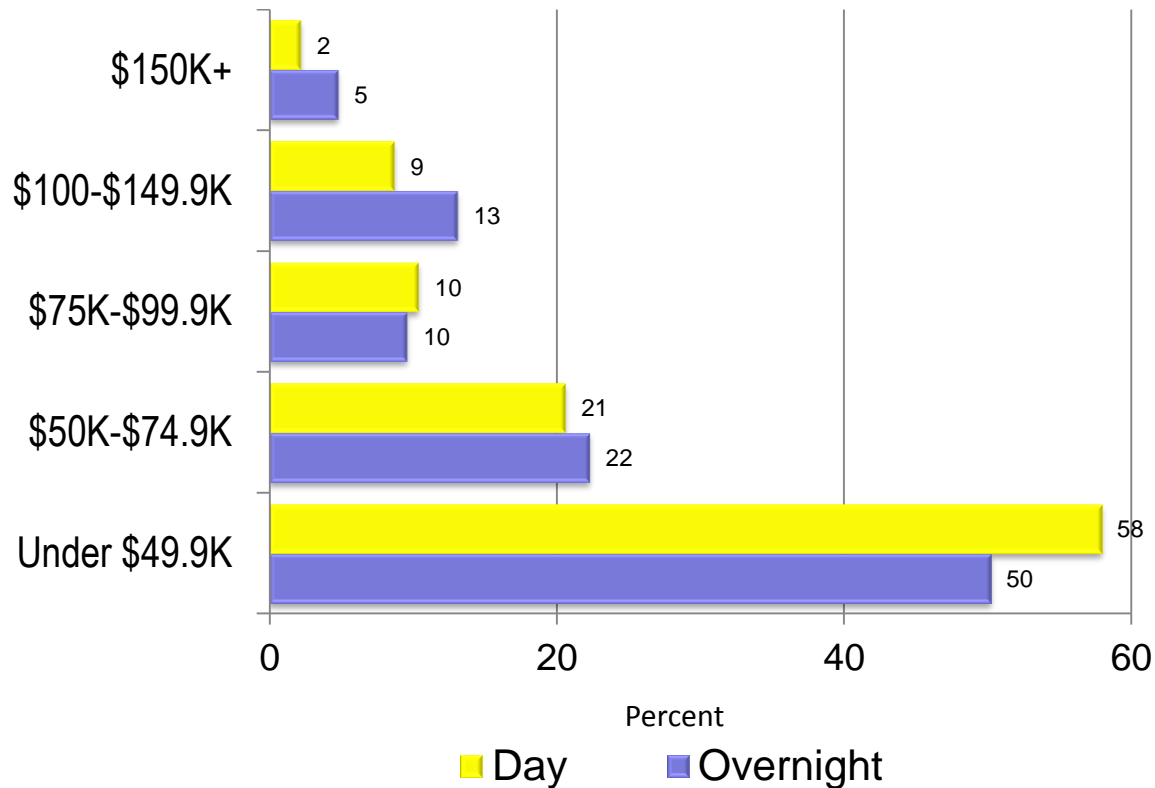
Base: Total Person-Trips to Idaho



# Household Income



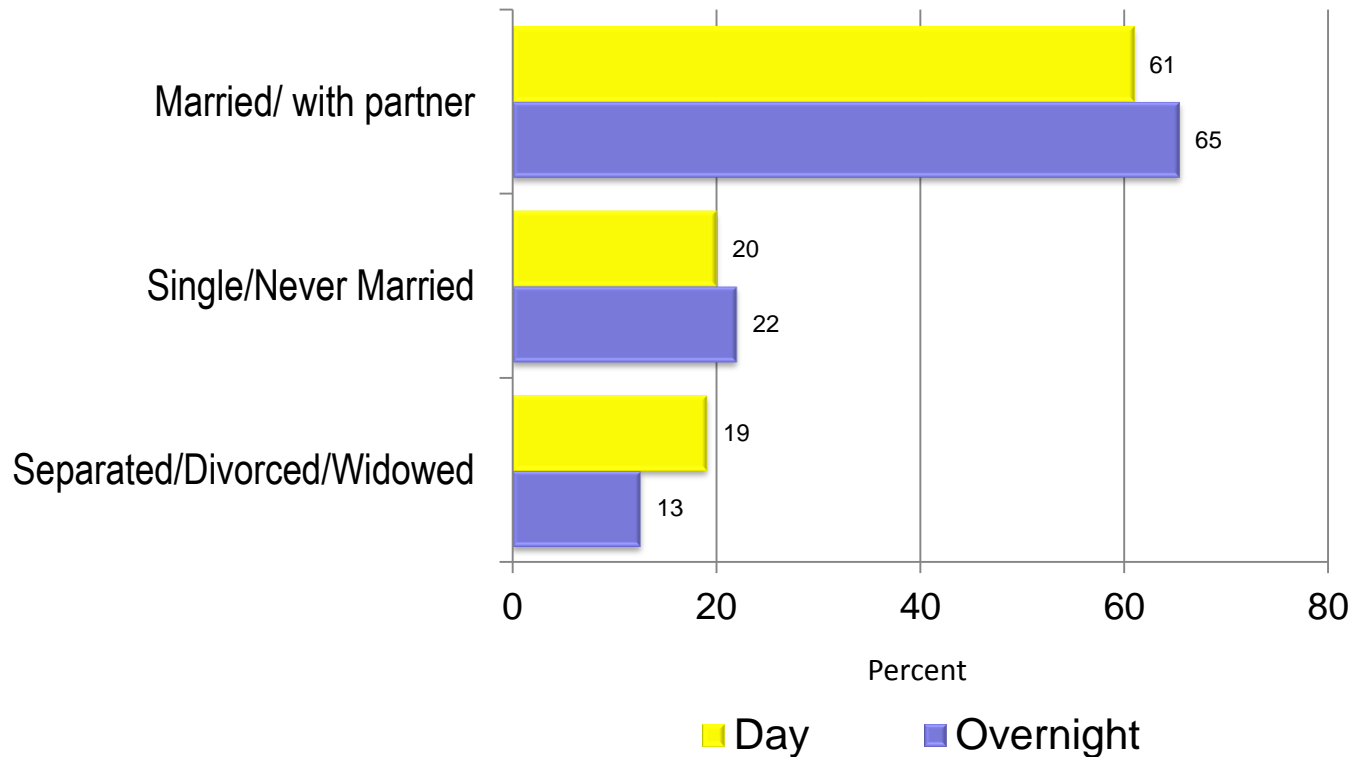
Base: Total Person-Trips to Idaho



# Marital Status



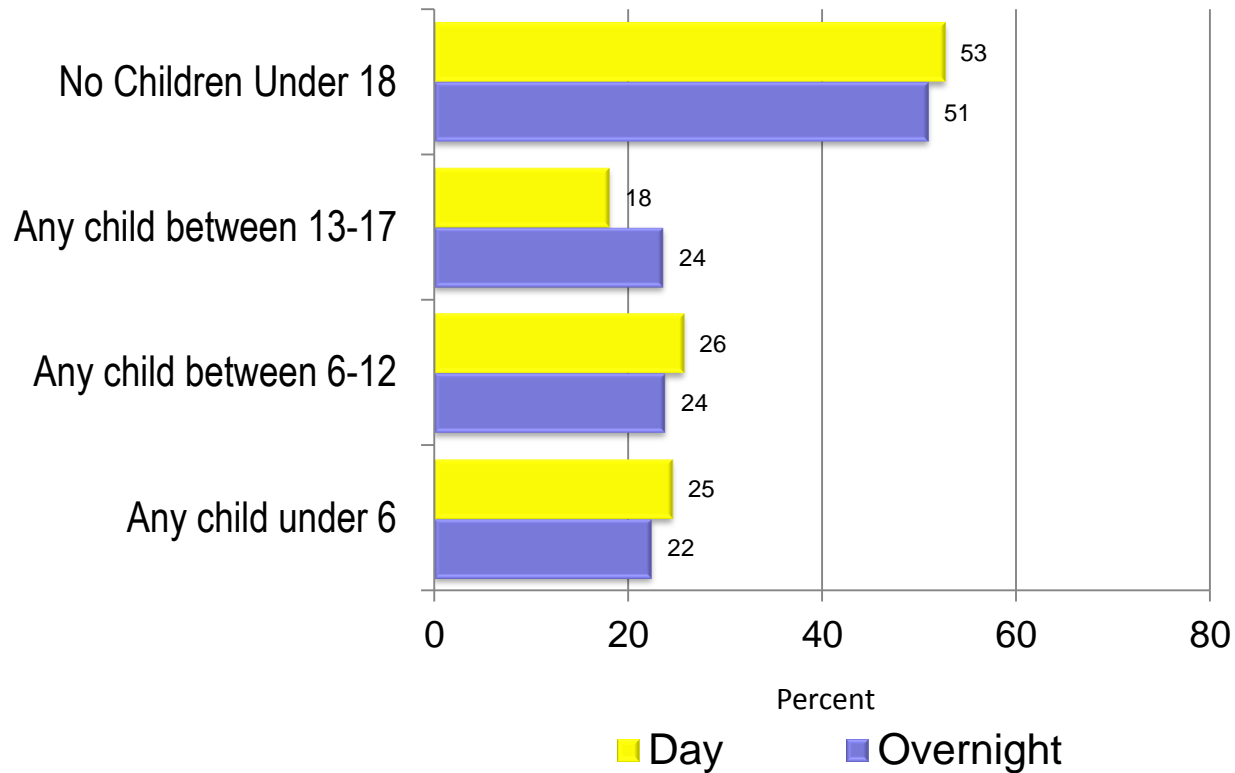
Base: Total Person-Trips to Idaho



# Children in Household



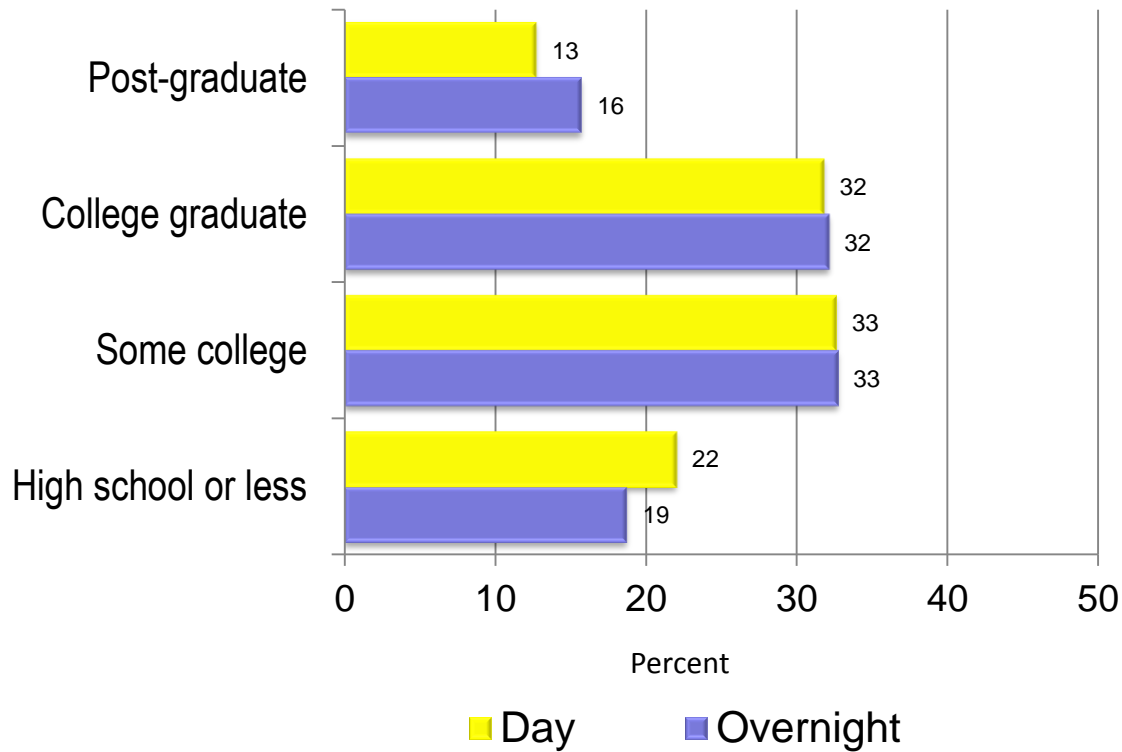
Base: Total Person-Trips to Idaho



# Education



Base: Total Person-Trips to Idaho

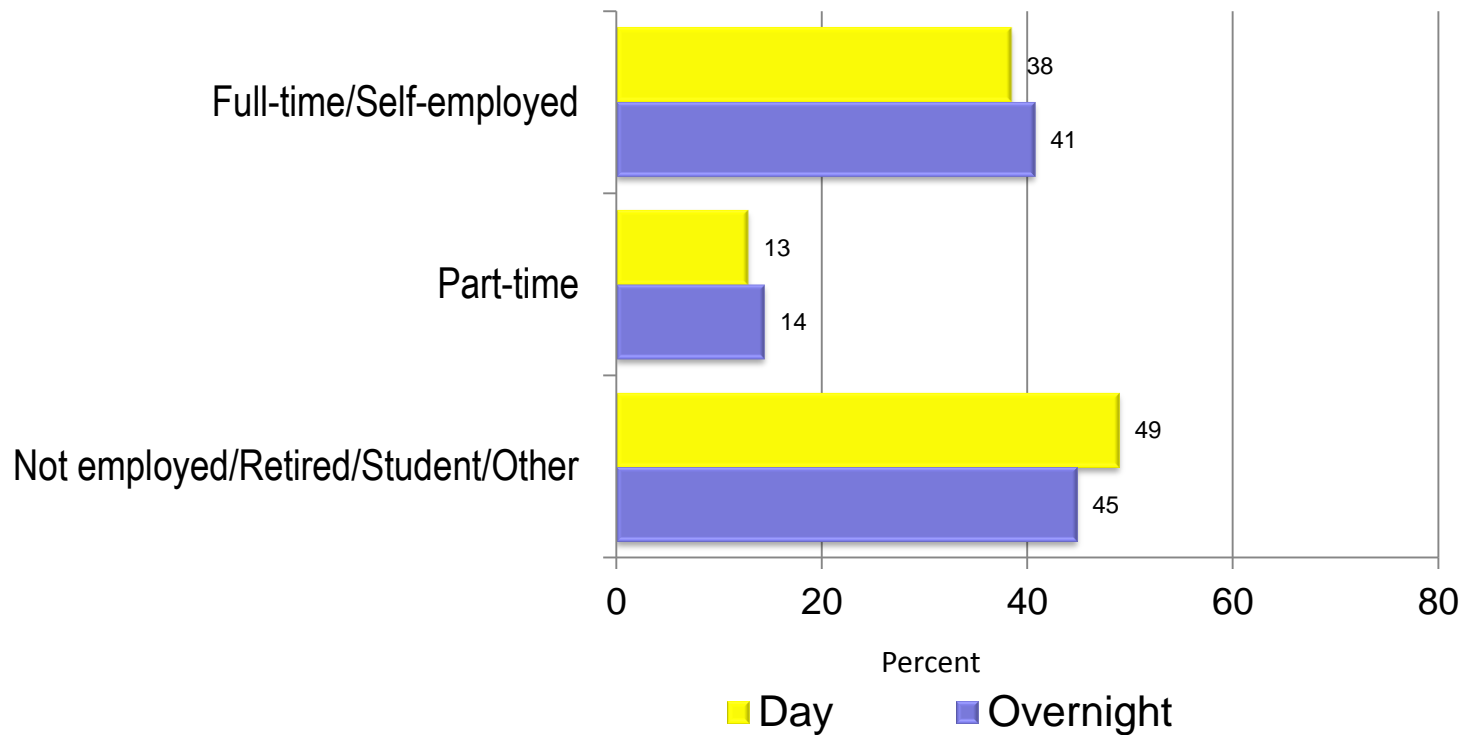




# Employment



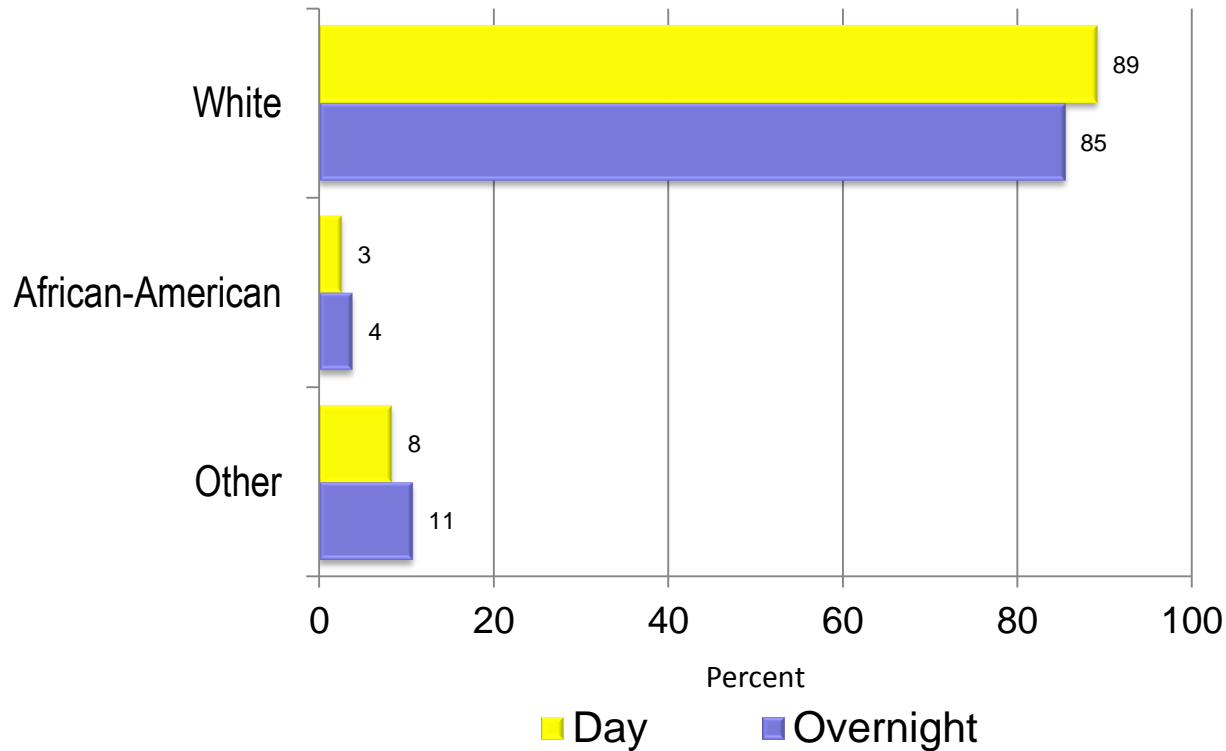
Base: Total Person-Trips to Idaho



# Race



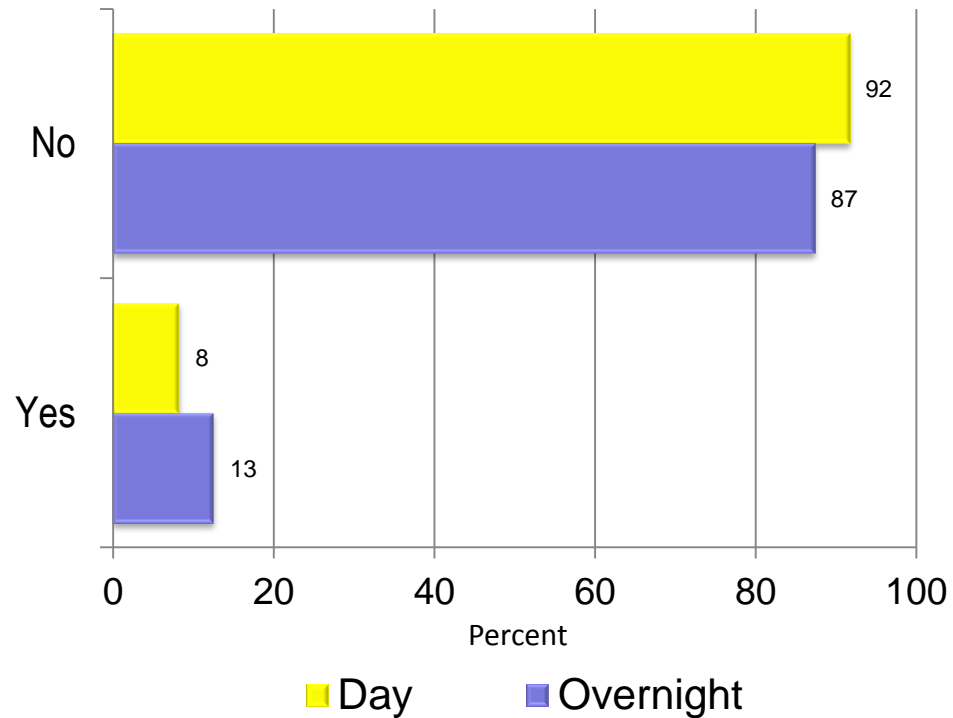
Base: Total Person-Trips to Idaho



# Hispanic Background



Base: Total Person-Trips to Idaho



# Key Takeaways



- ◉ Idaho Travel Market shrank 3% from 2008 to 2013
  - ◉ *Overnight trips down 13%, day trips up 4%*
  - ◉ *Overnight and day leisure trips are up*
  - ◉ *Overnight visitor spending on lodging up 8%*
  - ◉ *Day visitor spending is up 10%*
- ◉ Outdoor trips and experiences are increasingly important
- ◉ Overnight trips are longer
- ◉ Day and overnight trips are growing during the fourth quarter
- ◉ Overnight visitors skew male, day visitors skew female
- ◉ There are more young children in the households of Idaho visitors



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