



# Idaho

## 2015 Visitor Report

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# Introduction



- Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- This report provides an overview for Idaho's domestic tourism business in 2015 and does not include any international tourism analysis, including Canada.

# Methodology



- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.
- For the 2015 travel year, this yielded:
  - 337,164 trips for analysis nationally:
    - 237,555 overnight trips
    - 99,609 day trips
- For Idaho, the following sample was achieved in 2015:
  - 2,157 trips:
    - 1,449 overnight trips
    - 708 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



# Key Findings

# Key Findings



- In 2015, Idaho had 33 million person trips, an increase of 7.6% over 2013. 40% were overnight trips and 60% were day trips.
- The overnight trips generated \$1.7 billion in spending, an increase of 18.5% over 2013.
- When asked about the main purpose of their overnight trip, 45% responded that they were visiting friends and relatives, while 41% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip types were outdoors, touring through the region, and coming for a special event such as fair, festival or sports event.
- The average number of nights spent in Idaho on a marketable trip was 3 nights and the average travel party size was 4 persons.

## Key Findings – (Cont'd)



- ◉ Travelers on overnight marketable trips to Idaho were much more likely to use a Camper/RV as a transportation mode than the national average.
- ◉ Travelers on overnight marketable trips to Idaho were most likely to engage social media by posting photos online, reading travel reviews, and viewing photos online.
- ◉ The top five states of origin for overnight marketable trips were Idaho, Washington, California, Utah and Oregon. The top five DMA sources of overnight marketable trip were Boise, Salt Lake City, Idaho Falls-Pocatello, Seattle-Tacoma and Spokane.
- ◉ The top five activities engaged in by travelers on marketable overnight trips to Idaho were Hiking/Backpacking, Shopping, visiting a Landmark/Historic Site, visiting a National/State Park and Camping.



## Key Findings – (Cont'd)



- ◉ 72% of overnight marketable visitors to Idaho said they were “very satisfied” with their overall trip experience. 65% said they were “very satisfied” with the friendliness of people while only 34% said they were “very satisfied” with the Music/Nightlife/Entertainment.
- ◉ 81% of marketable visitors had visited Idaho before, and 70% said they had visited in the past year.
- ◉ 45% of overnight marketable trips were planned 2 months or less before the trip, and 11% did not plan anything in advance.
- ◉ “Advice from relatives and friends” was the most frequently cited source of planning information at 25%, while “Hotel or Resort” was the top ranked method of booking at 22%.

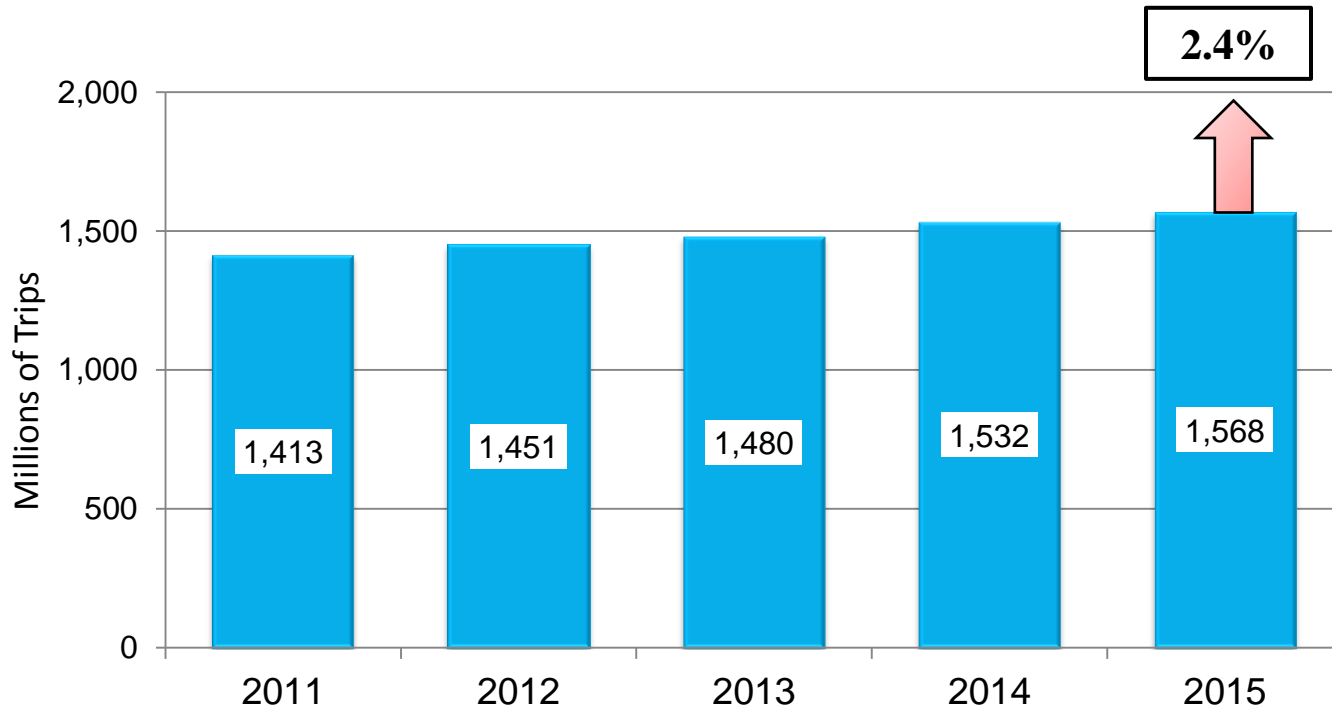


# Size & Structure of the U.S. Travel Market

# Total Size of the U.S. Travel Market — 2011-2015



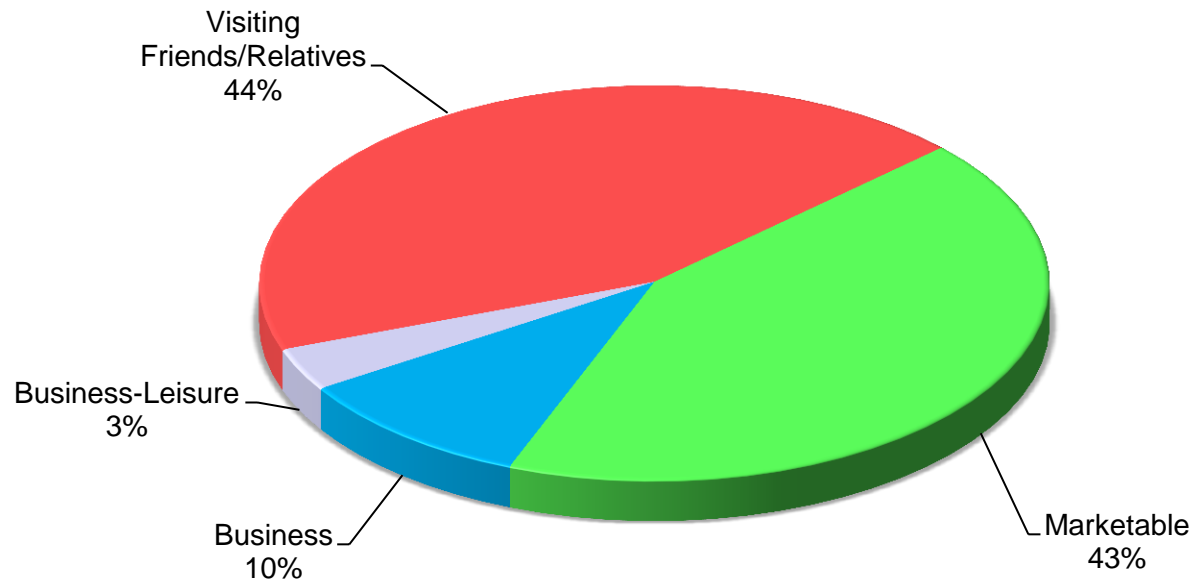
Base: Total Overnight Person-Trips



# Structure of the U.S. Travel Market — 2015 Overnight Trips



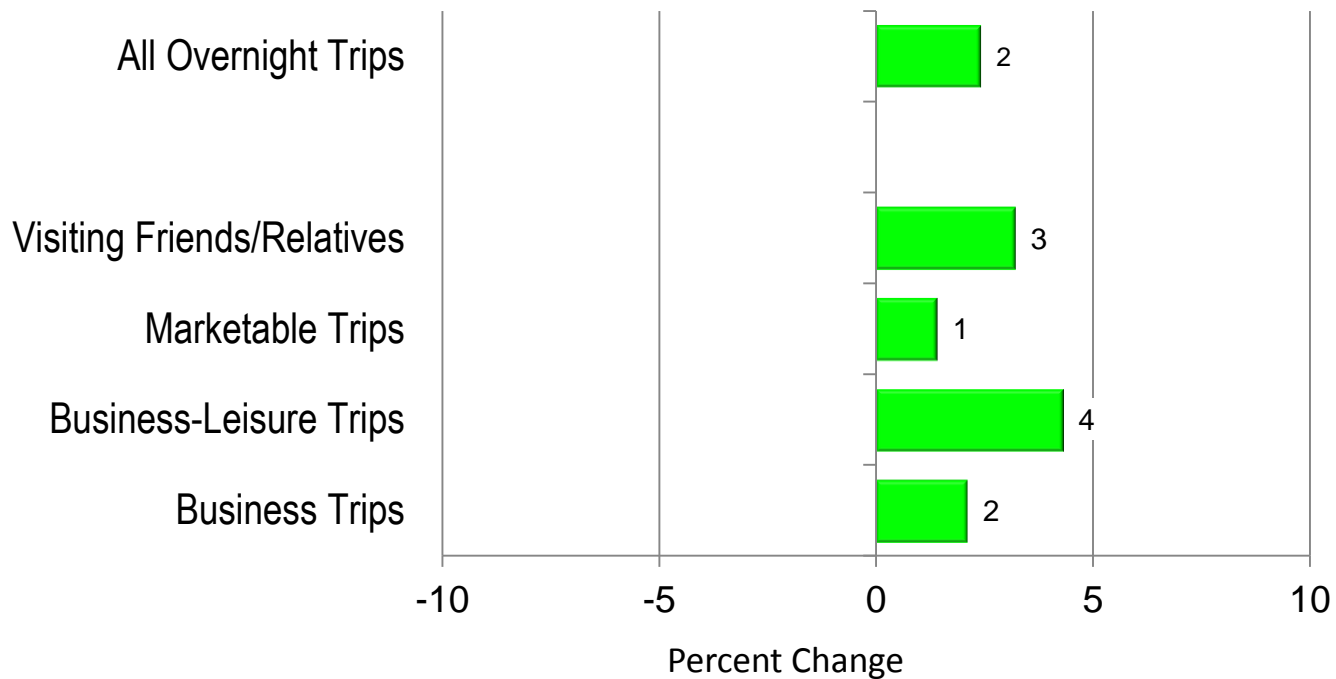
Base: Total Overnight Person-Trips



# U.S. Market Trends for Overnight Trips – 2015 vs. 2014



Base: Total Overnight Person-Trips





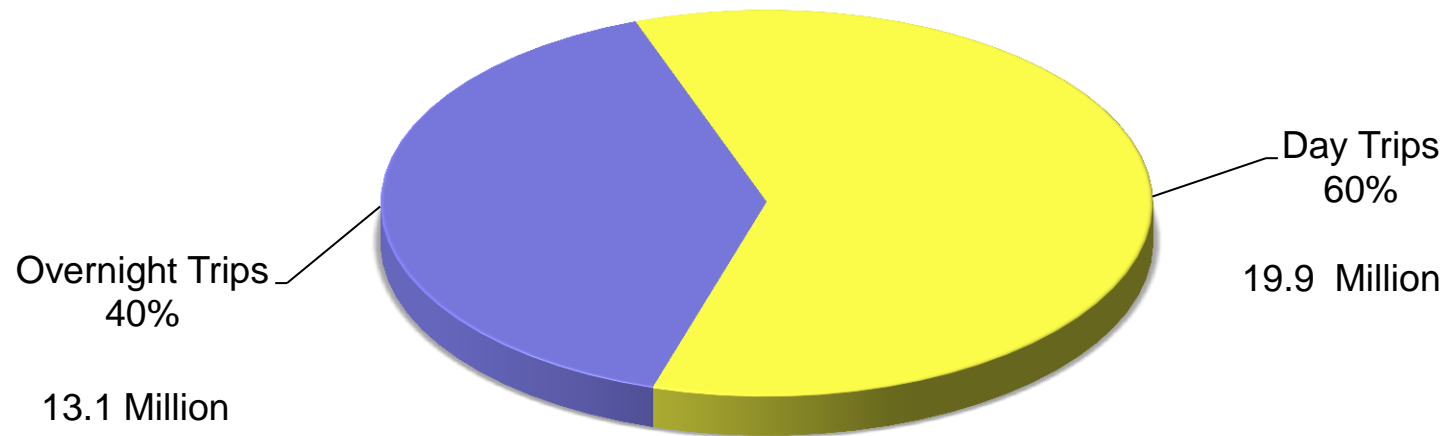
# Size & Structure of Idaho's Travel Market

# Total Size of the Idaho Travel Market in 2015



**Total Person-Trips = 33 Million**

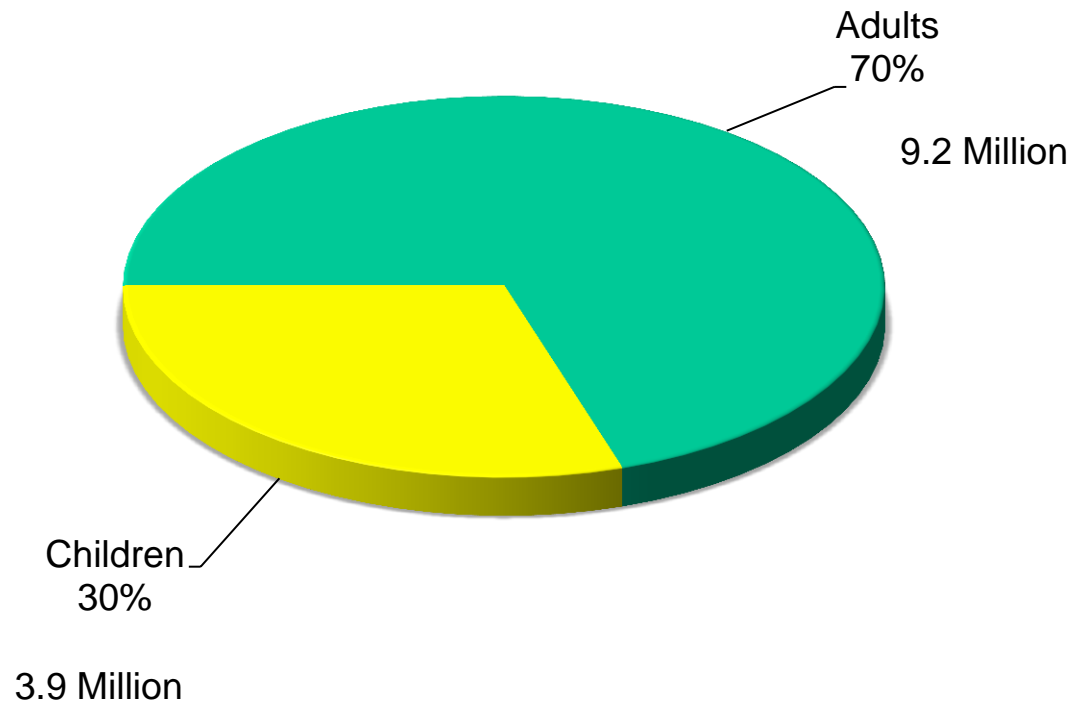
**+7.6% vs. 2013**



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



**Total Overnight Person-Trips = 13.1 Million**

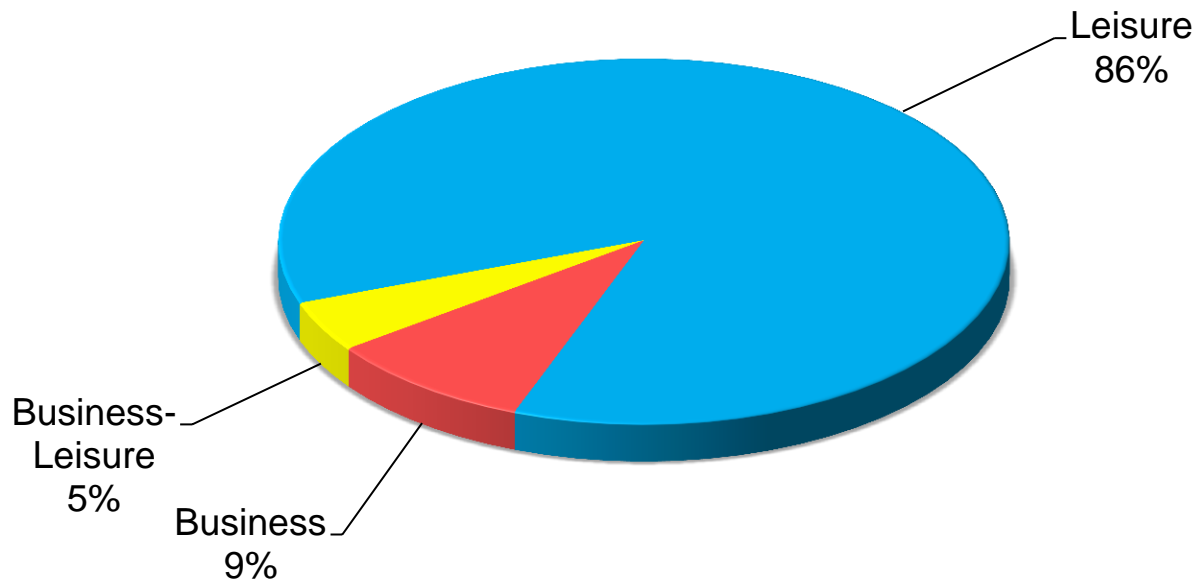




# Idaho's Overnight Travel Market — by Trip Purpose



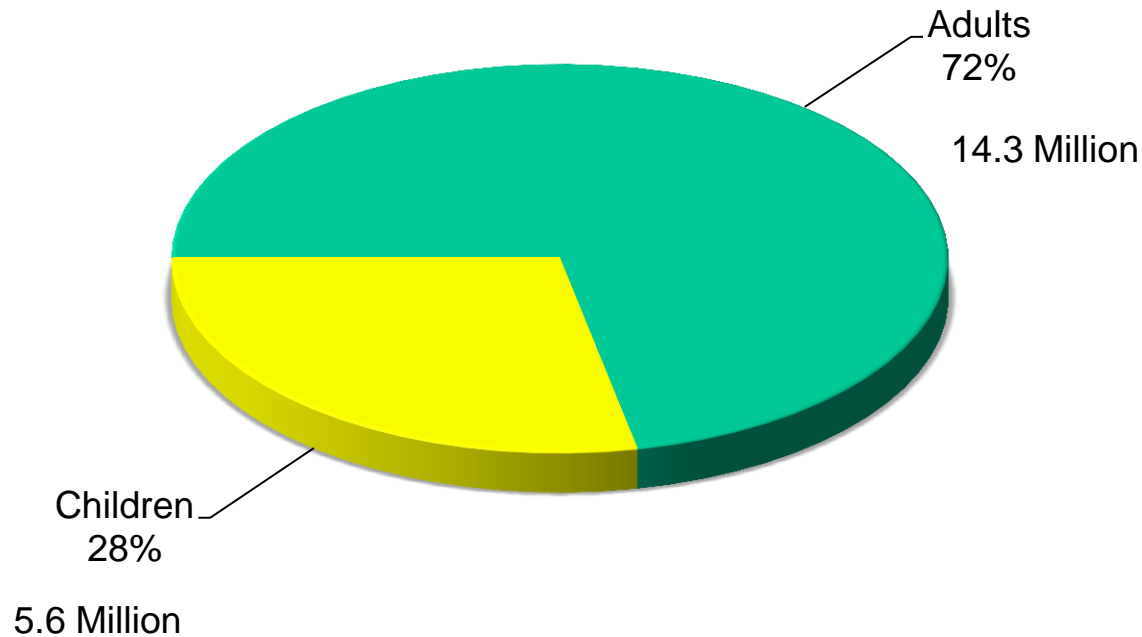
**Adult Overnight Person-Trips = 9.2 Million**



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



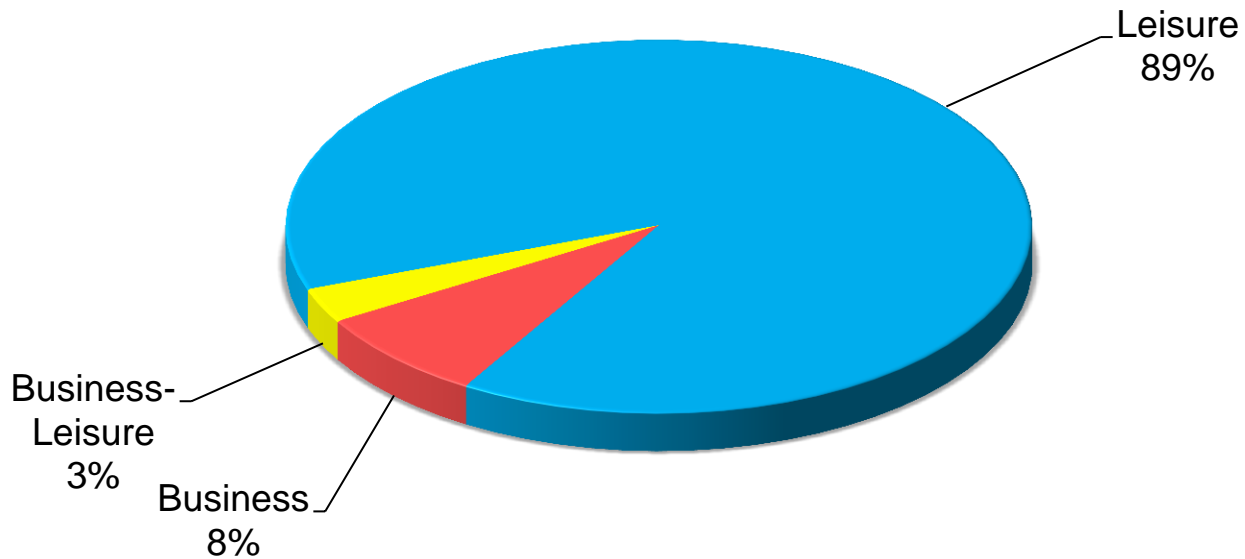
**Total Day Person-Trips = 19.9 Million**



# Idaho's Day Travel Market — by Trip Purpose



**Adult Day Person-Trips = 14.3 Million**





# Overnight Trip Detail



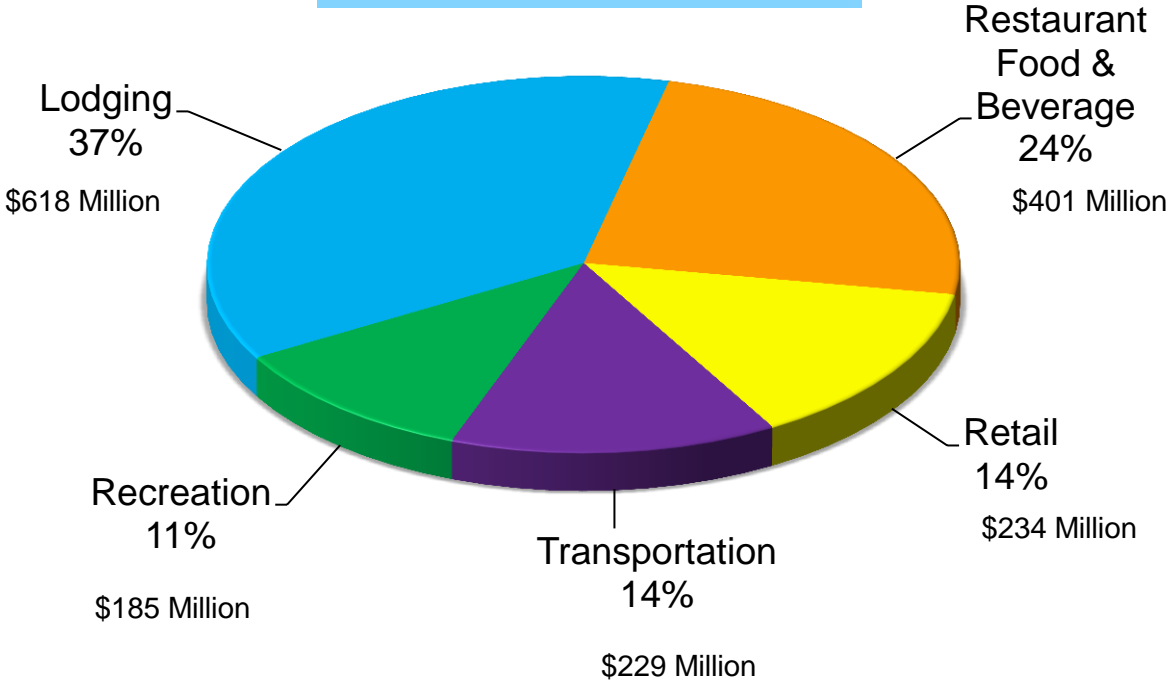
# Overnight Expenditures

# Total Overnight Spending – by Sector

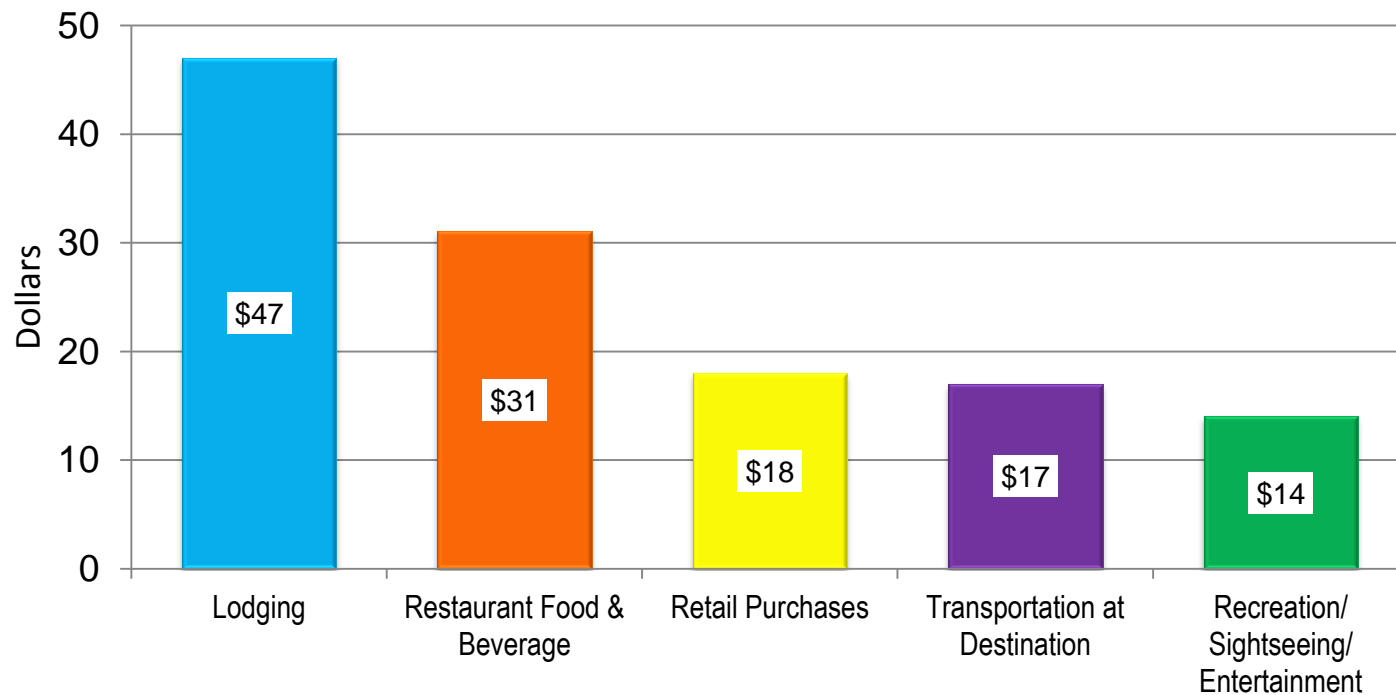


**Total Spending = \$1.7 Billion**

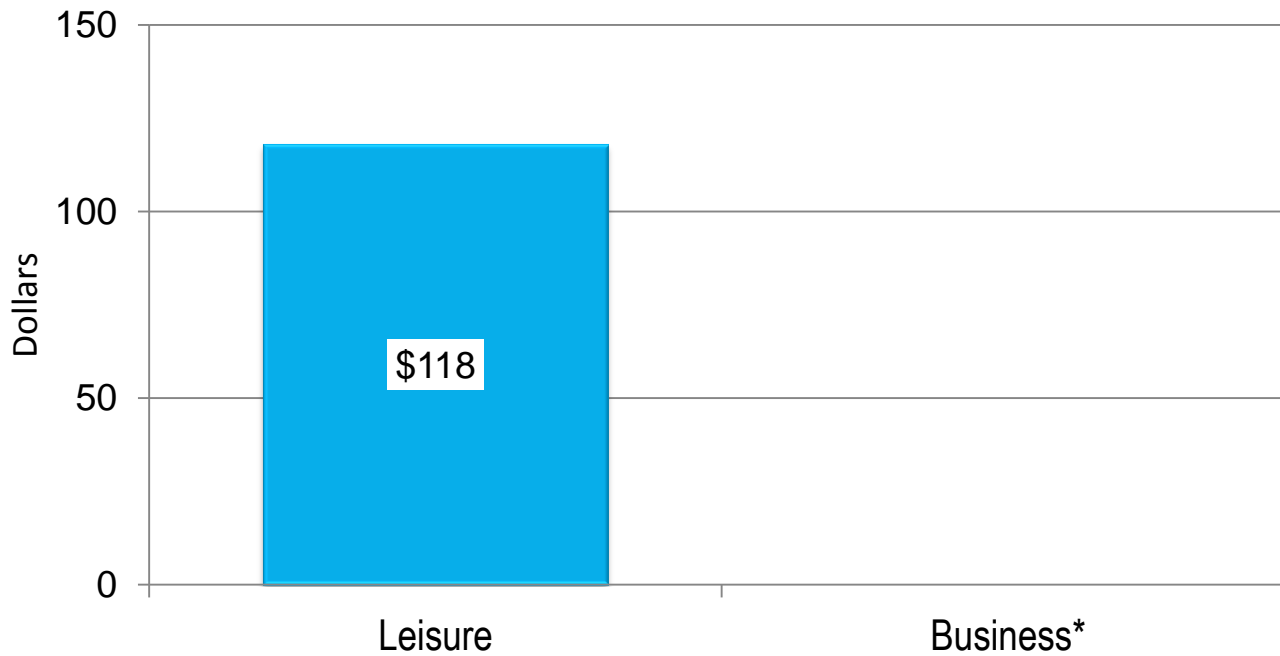
**+18.5% vs. 2013**



# Average Per Person Expenditures on Overnight Trips — By Sector



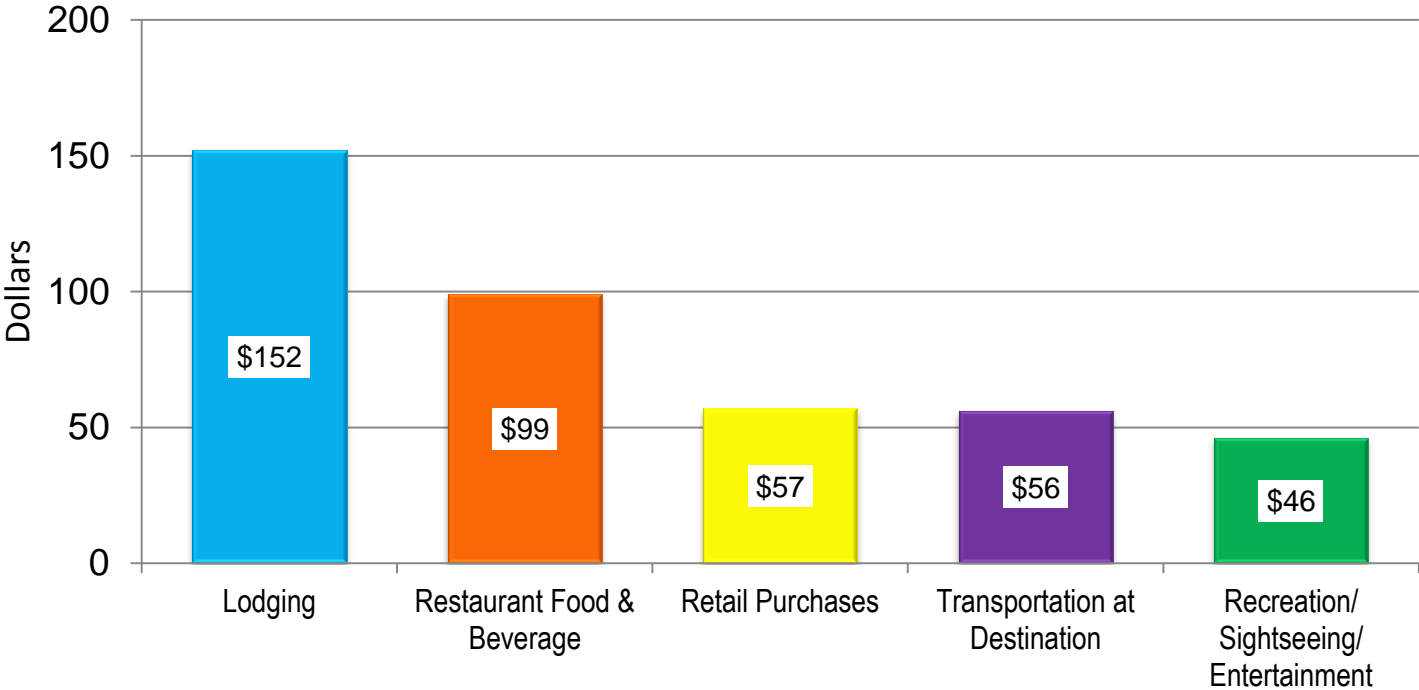
# Average Per Person Expenditures on Overnight – by Trip Purpose



\* Low Business Base:



# Average Per Party Expenditures on Overnight Trips – By Sector



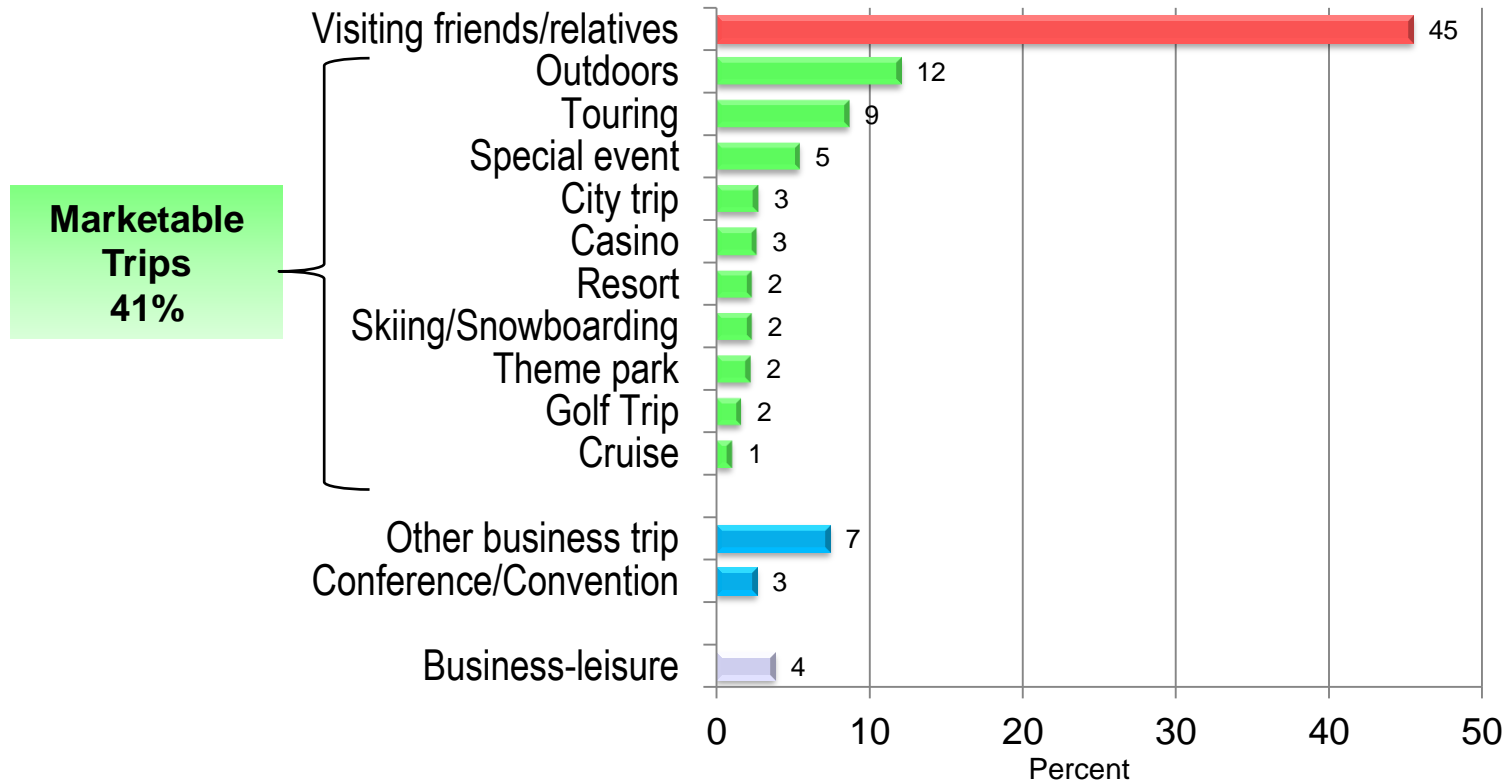


# Overnight Trip Characteristics

# Main Purpose of Trip



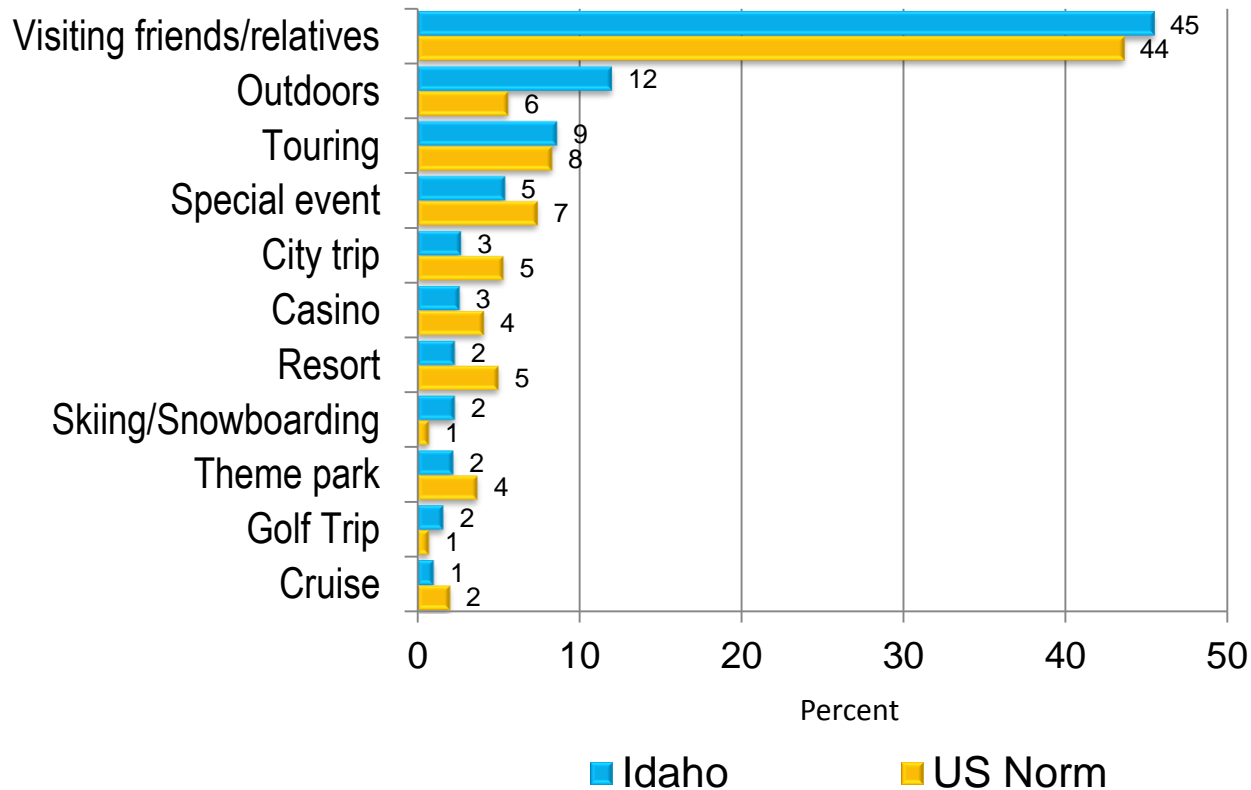
Base: Total Overnight Person-Trips



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



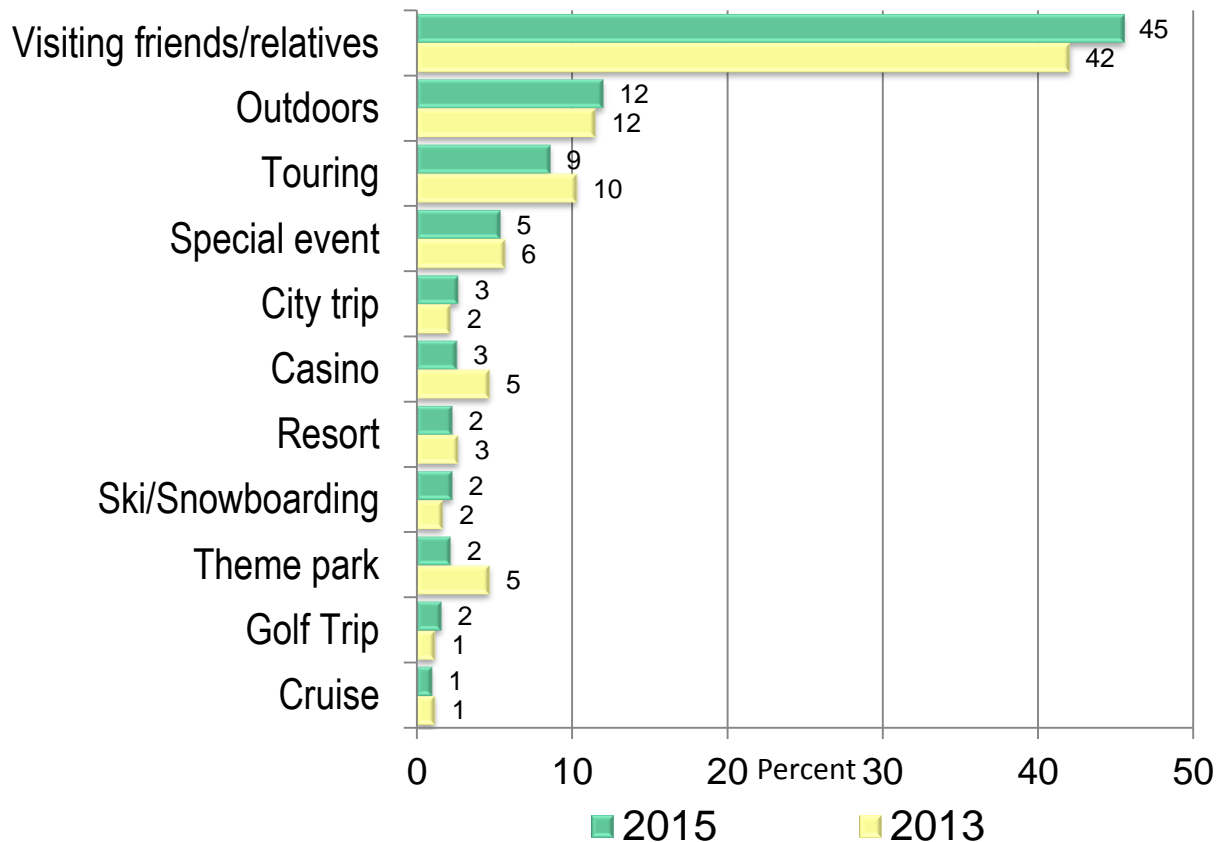
Base: Total Overnight Person-Trips



# Main Purpose of Leisure Trip — 2015 vs. 2013



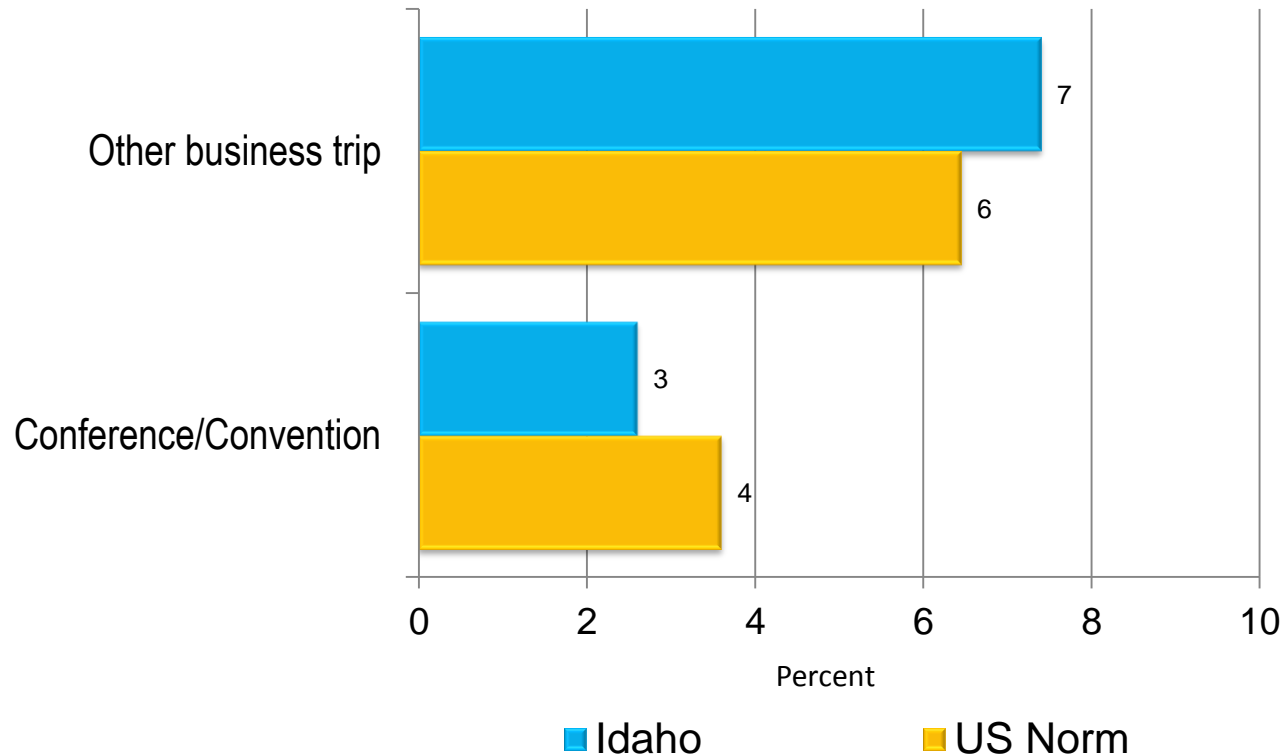
Base: Total Overnight Person-Trips



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



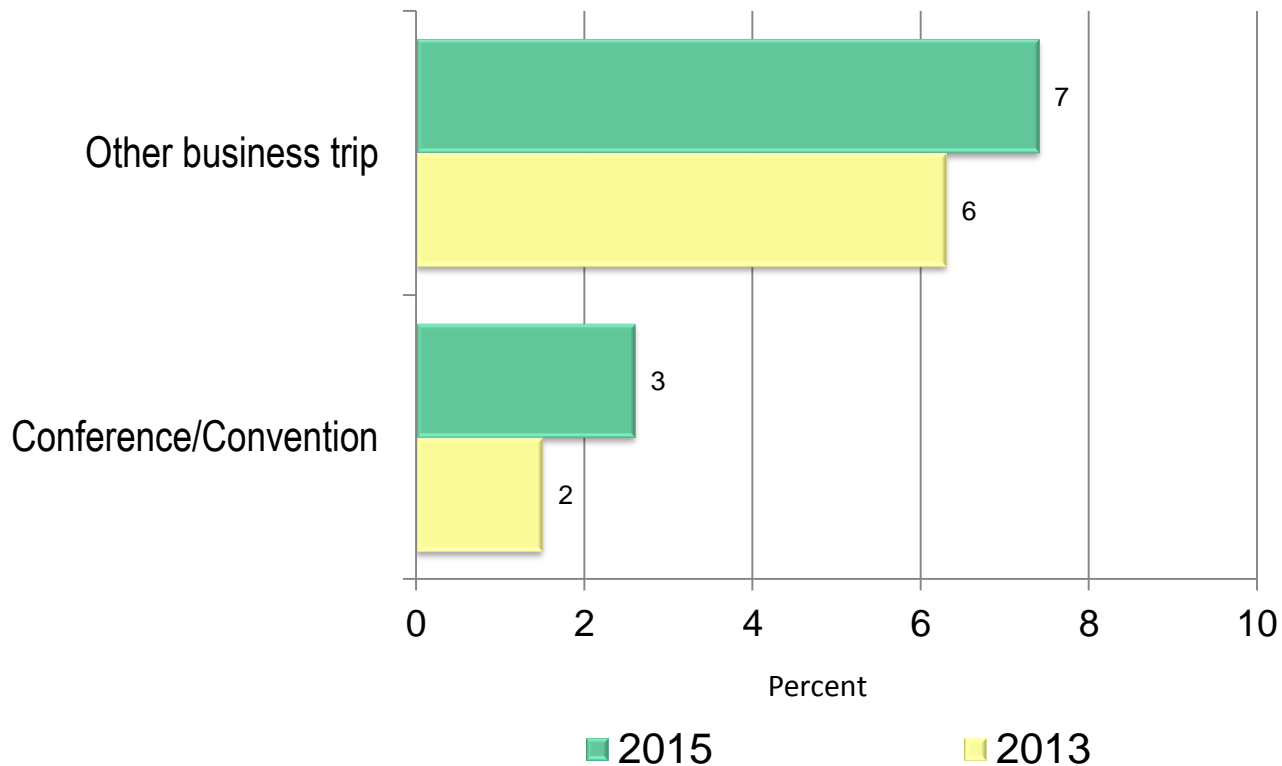
Base: Total Overnight Person-Trips



# Main Purpose of Business Trip — 2015 vs. 2013



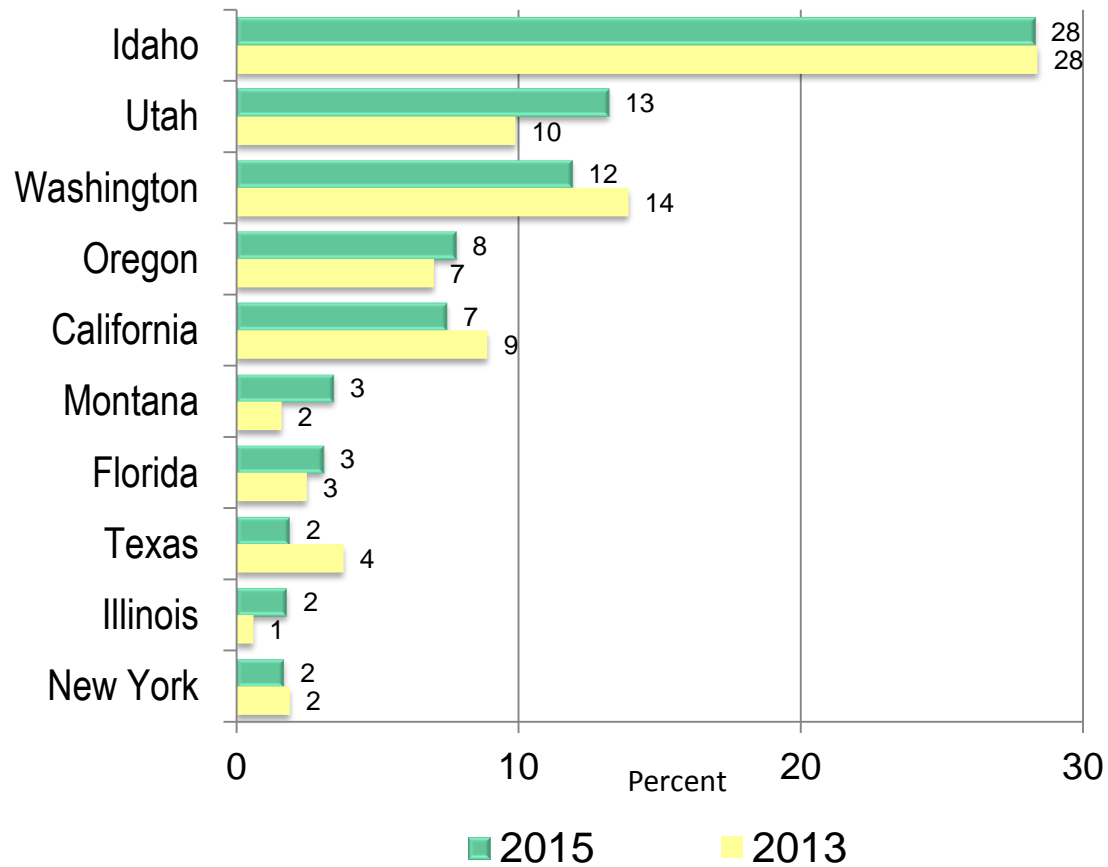
Base: Total Overnight Person-Trips



# State Origin Of Trip



Base: Total Overnight Person-Trips

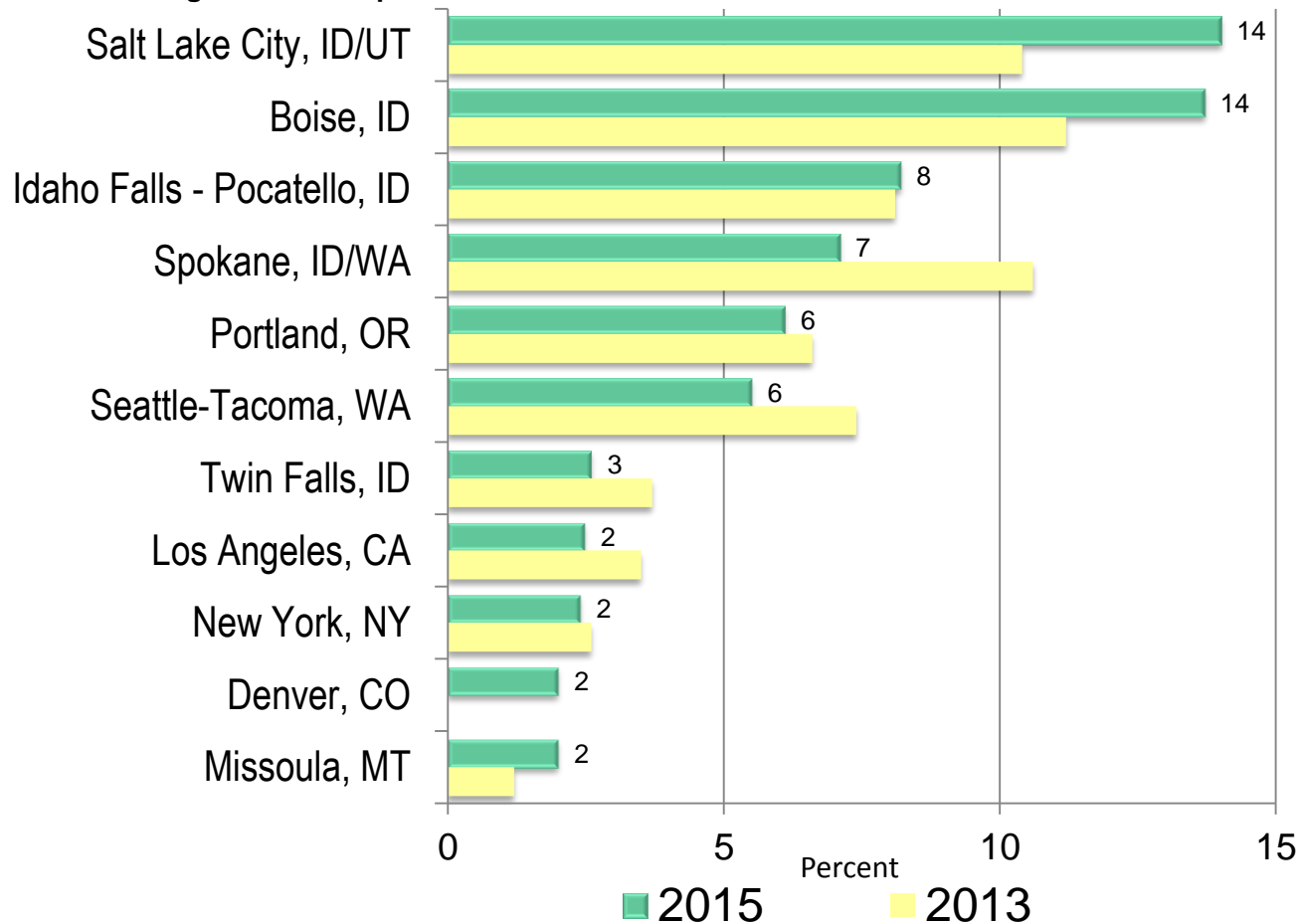




# DMA Origin Of Trip



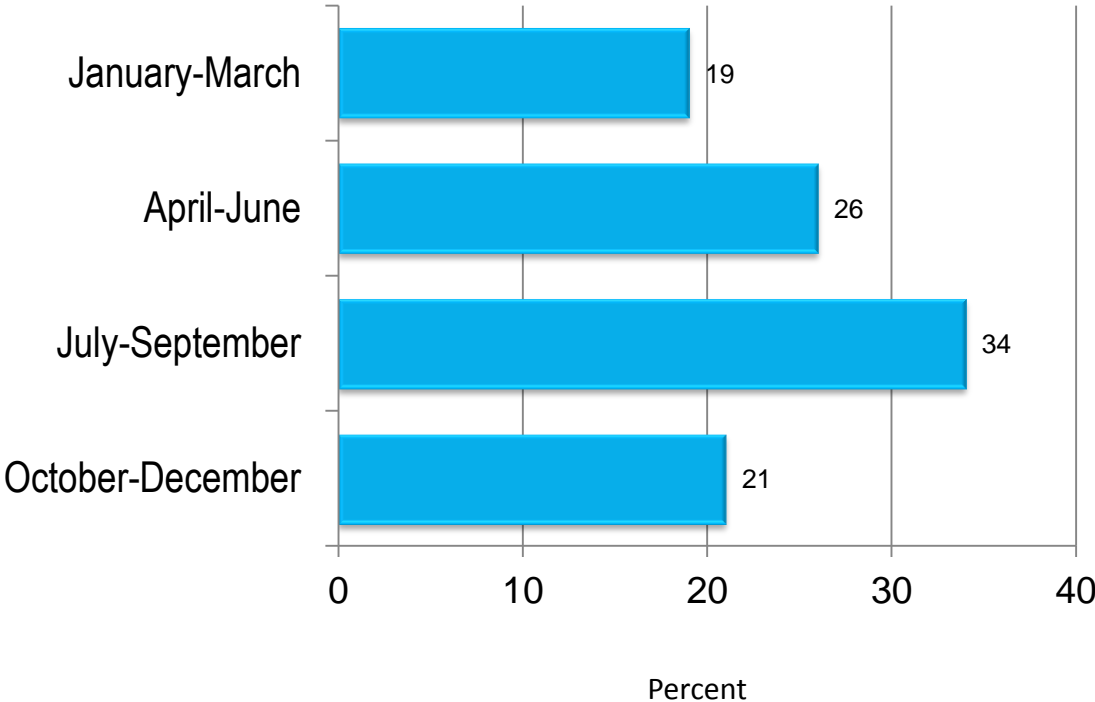
Base: Total Overnight Person-Trips



# Season of Trip



Base: Total Overnight Person-Trips

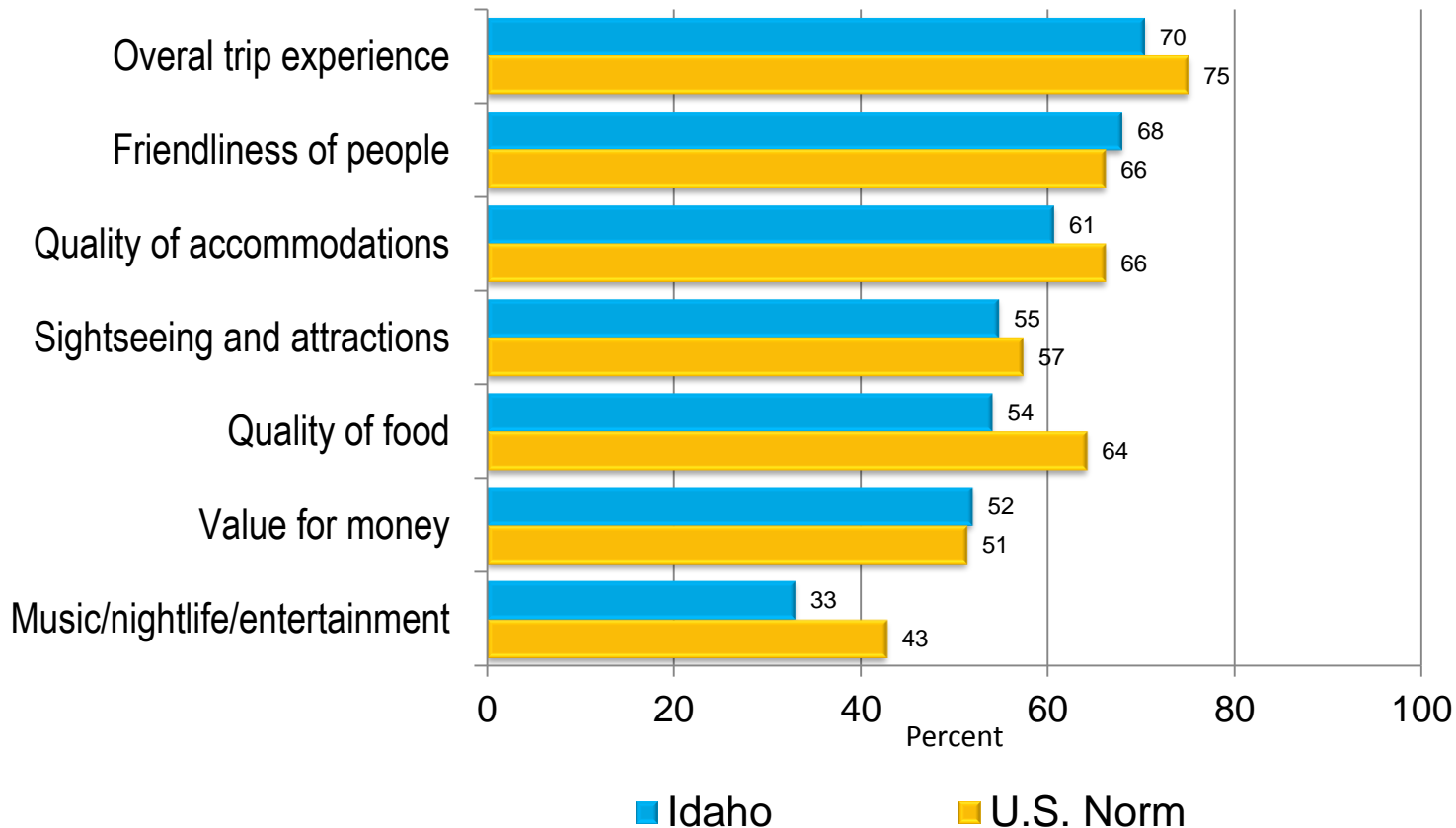


# Satisfaction with Trip

## % Very Satisfied



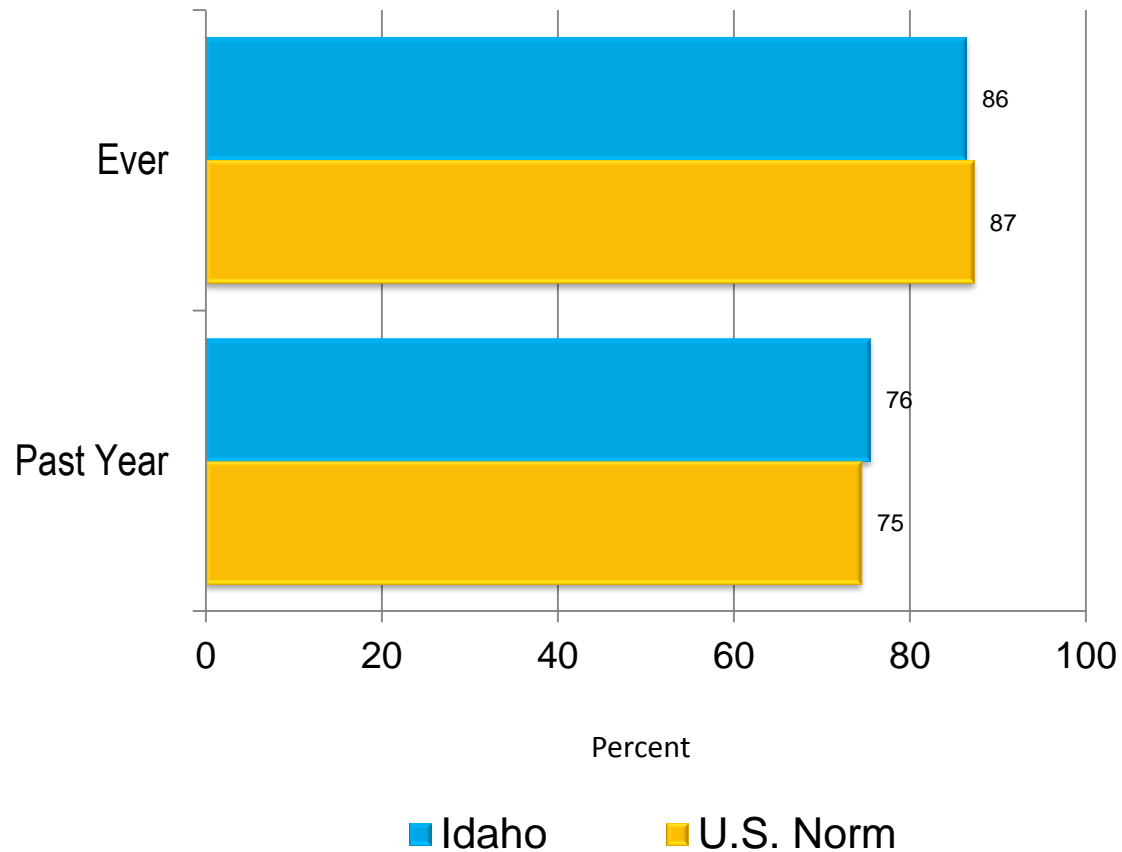
Base: Total Overnight Person-Trips



# Past Visitation



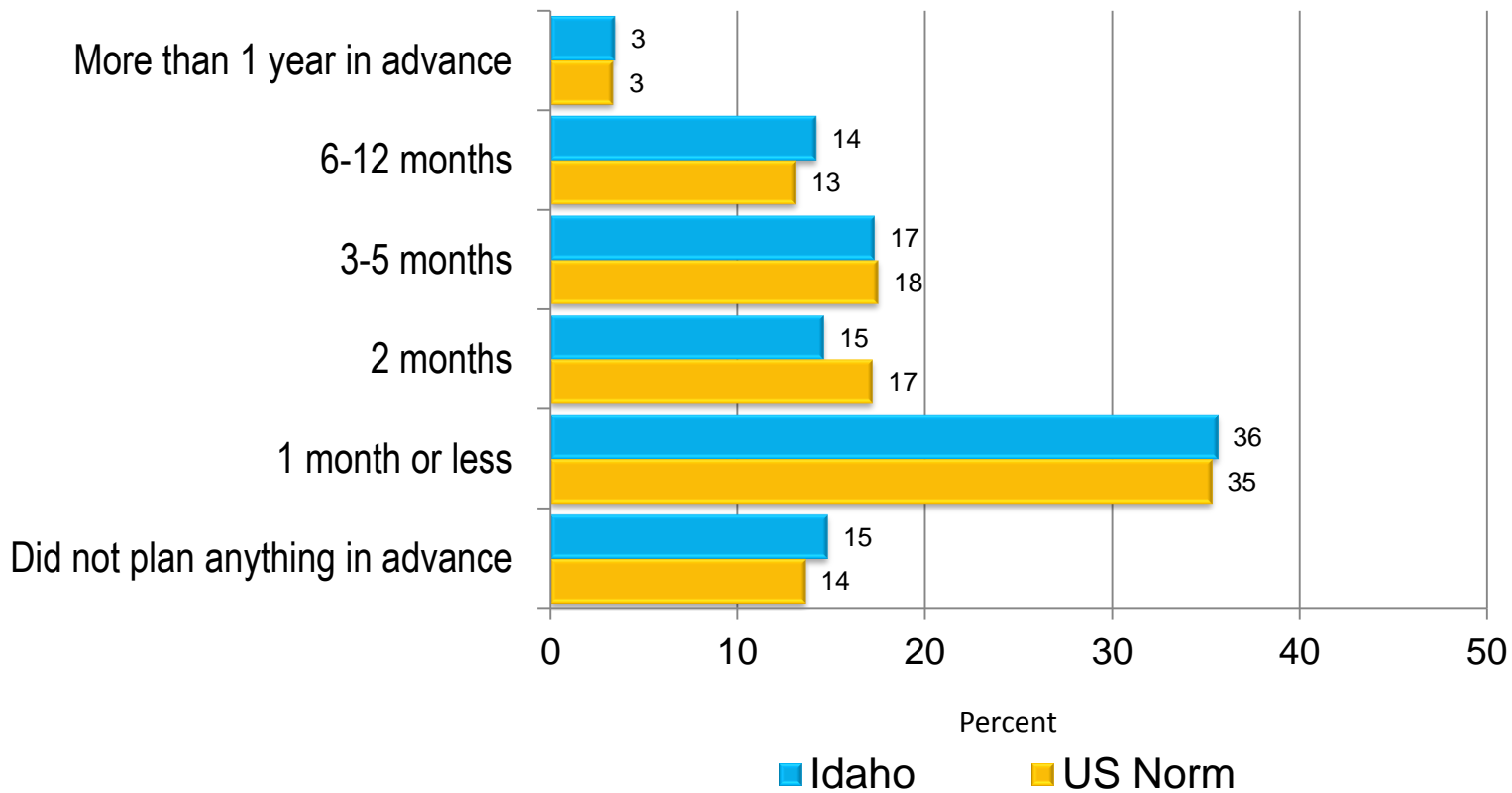
Base: Total Overnight Person-Trips



# Length of Trip Planning



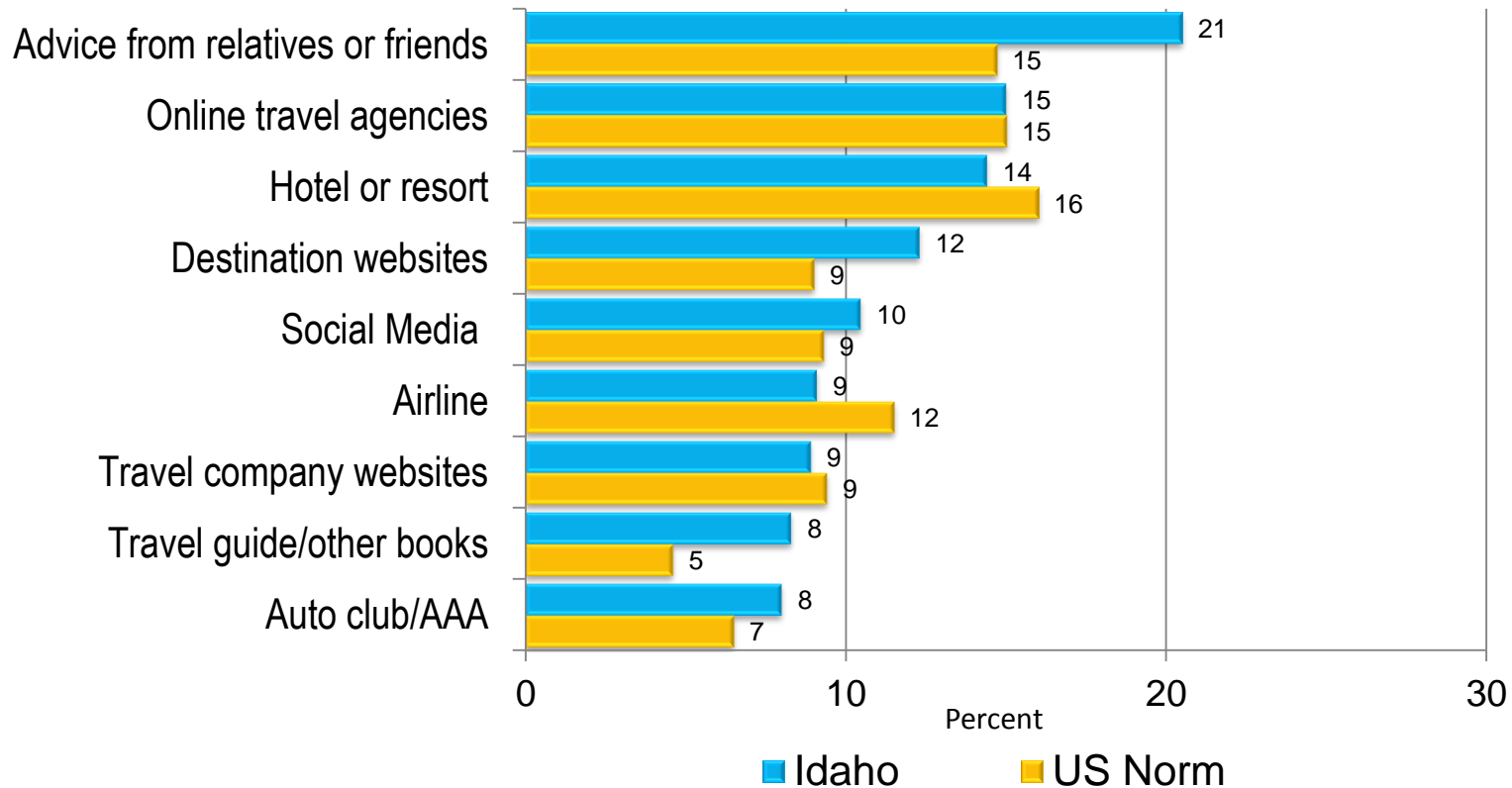
Base: Total Overnight Person-Trips



# Trip Planning Information Sources



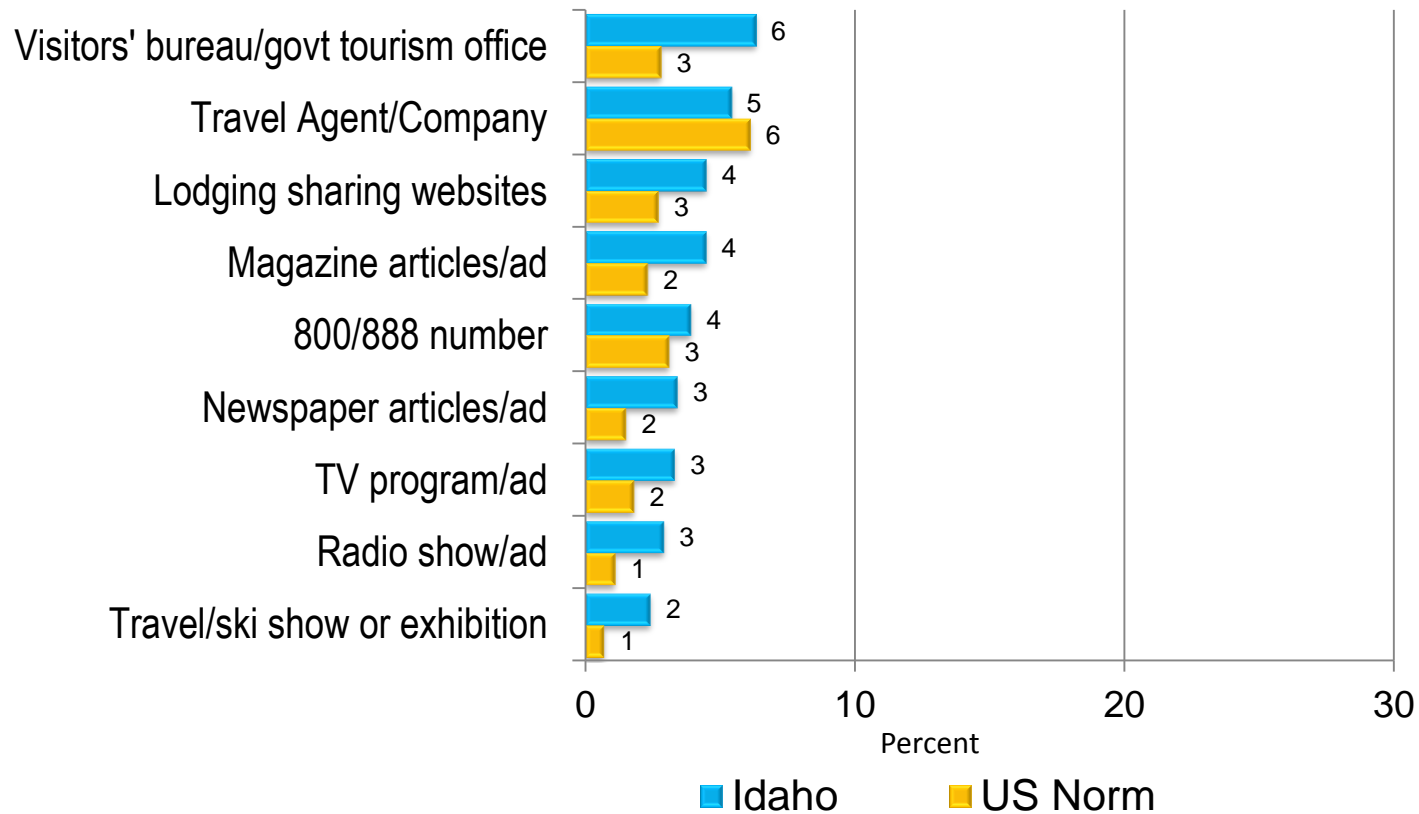
Base: Total Overnight Person-Trips



# Trip Planning Information Sources (Cont'd)



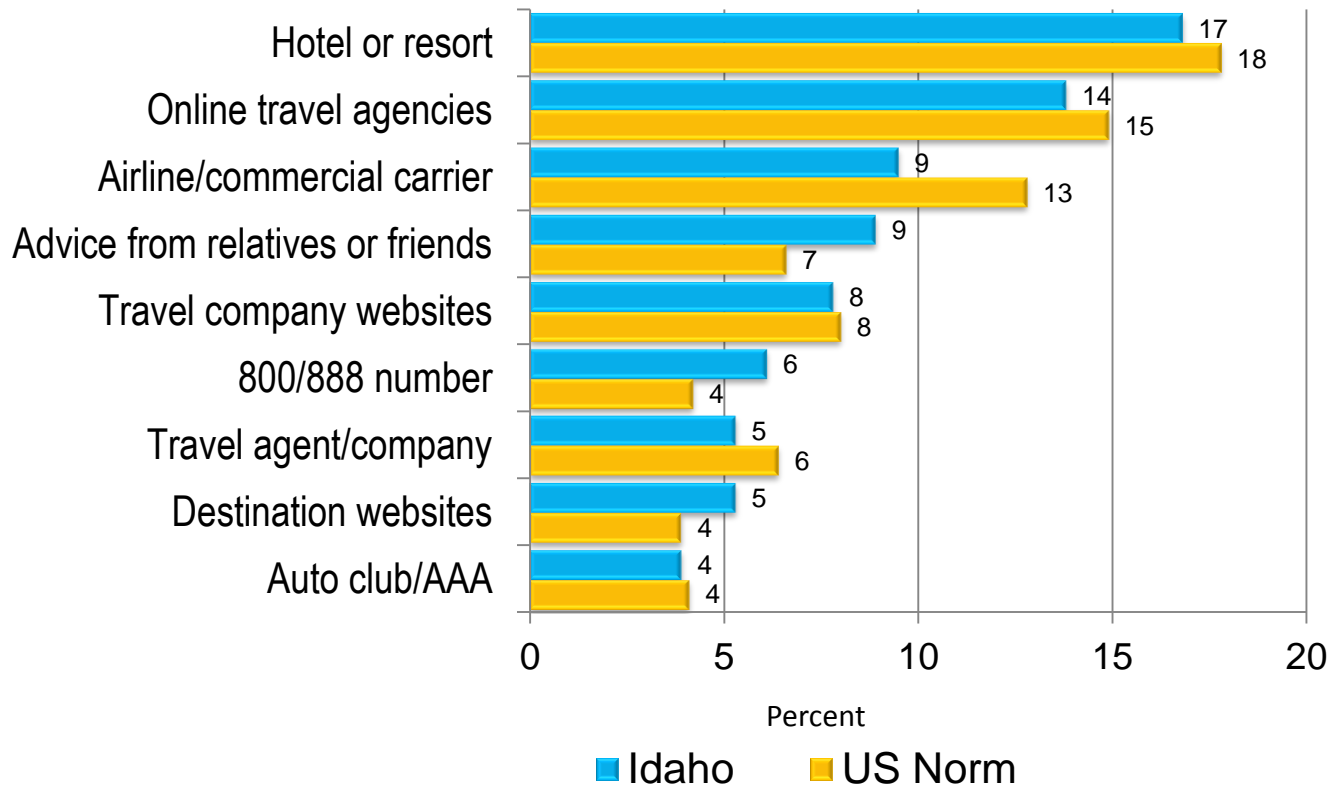
Base: Total Overnight Person-Trips



# Method of Booking Trip



Base: Total Overnight Person-Trips

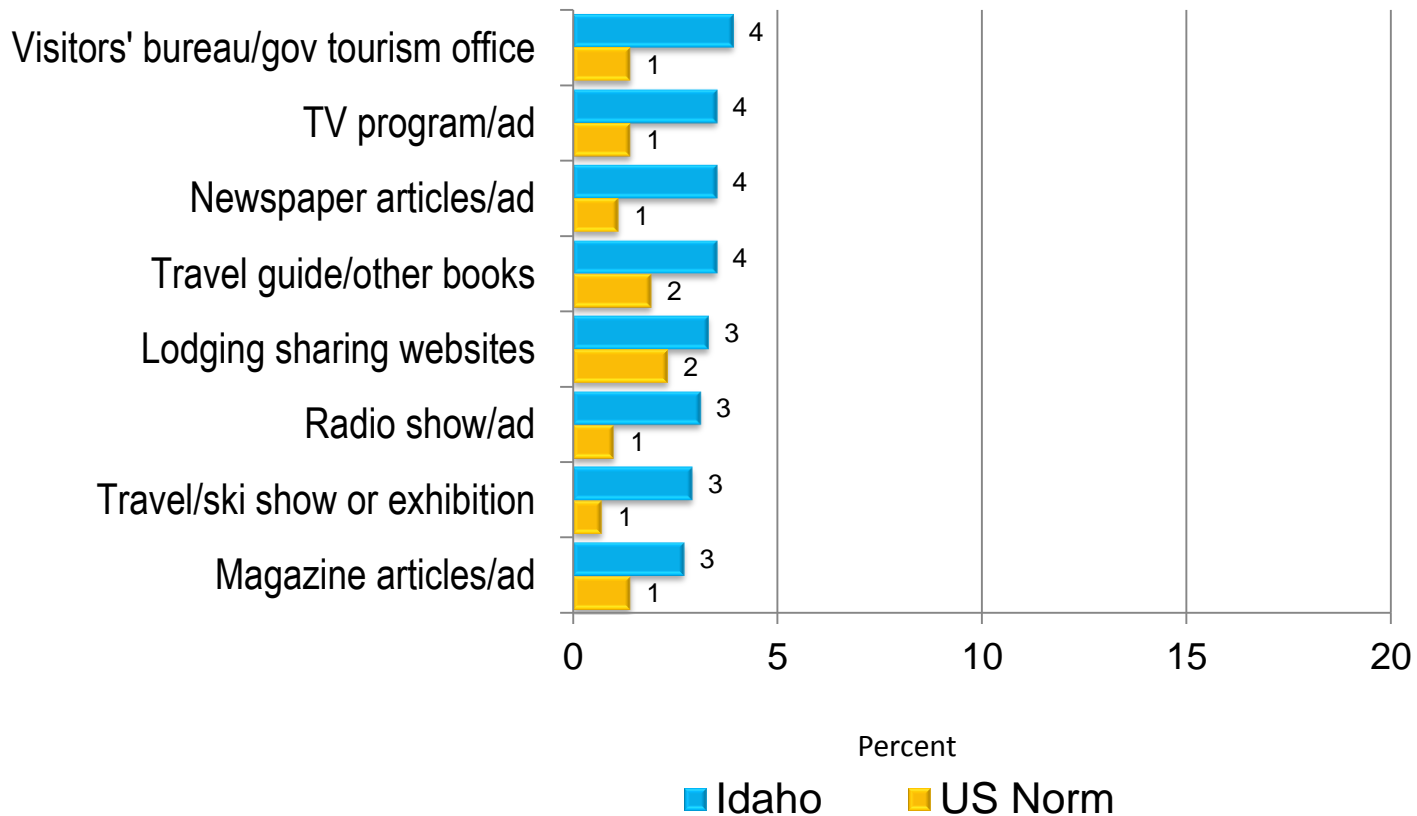




# Method of Booking Trip (Cont'd)



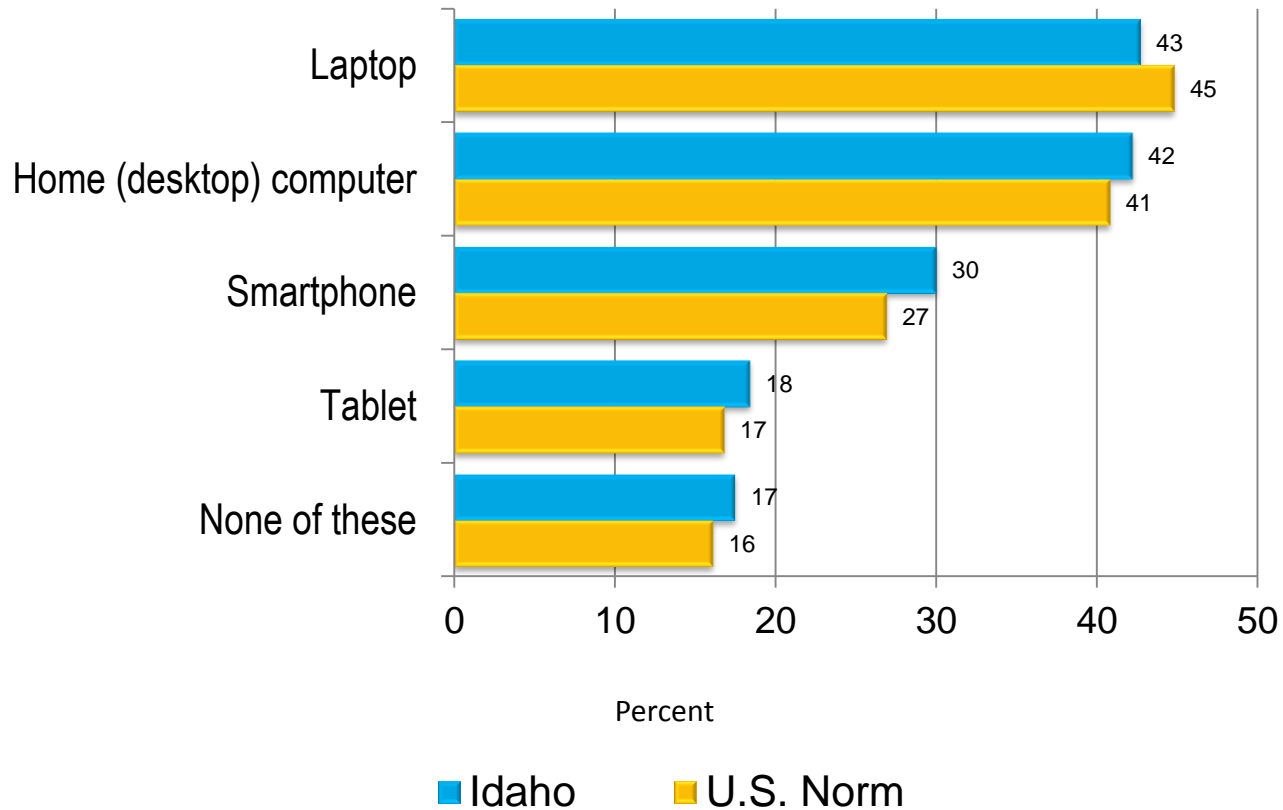
Base: Total Overnight Person-Trips



# Devices Used for Trip Planning



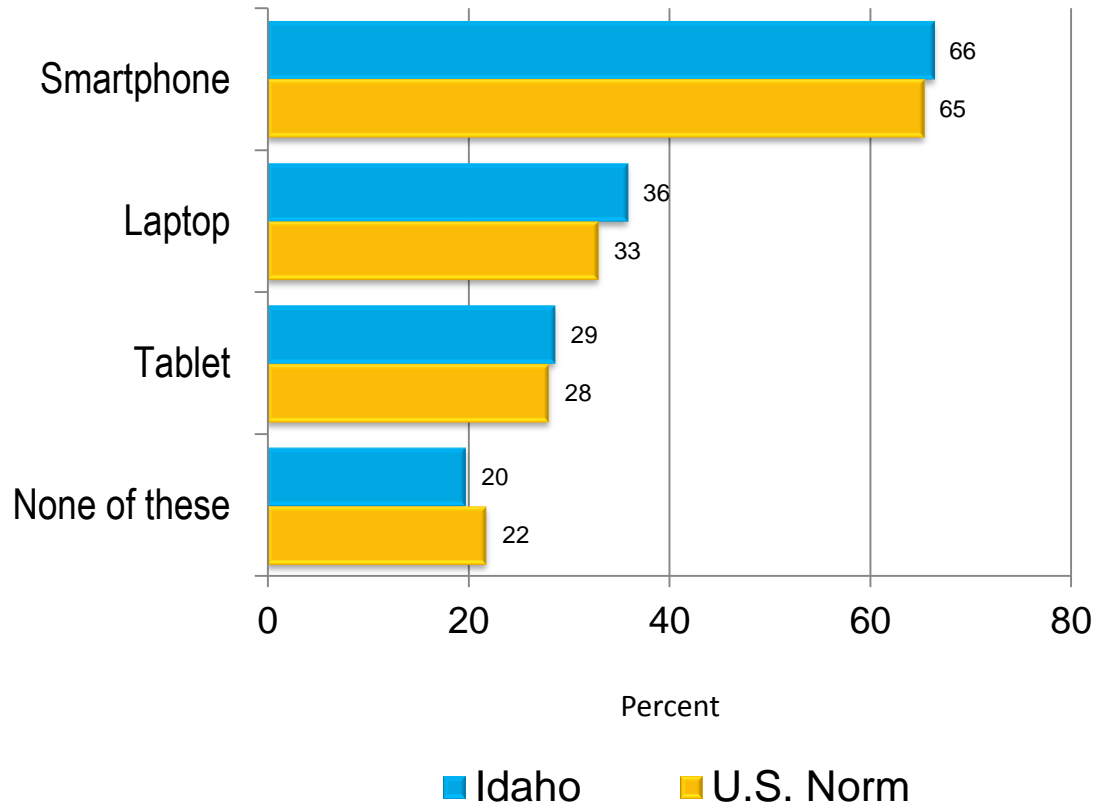
Base: Total Overnight Person-Trips



# Devices Used During Trip



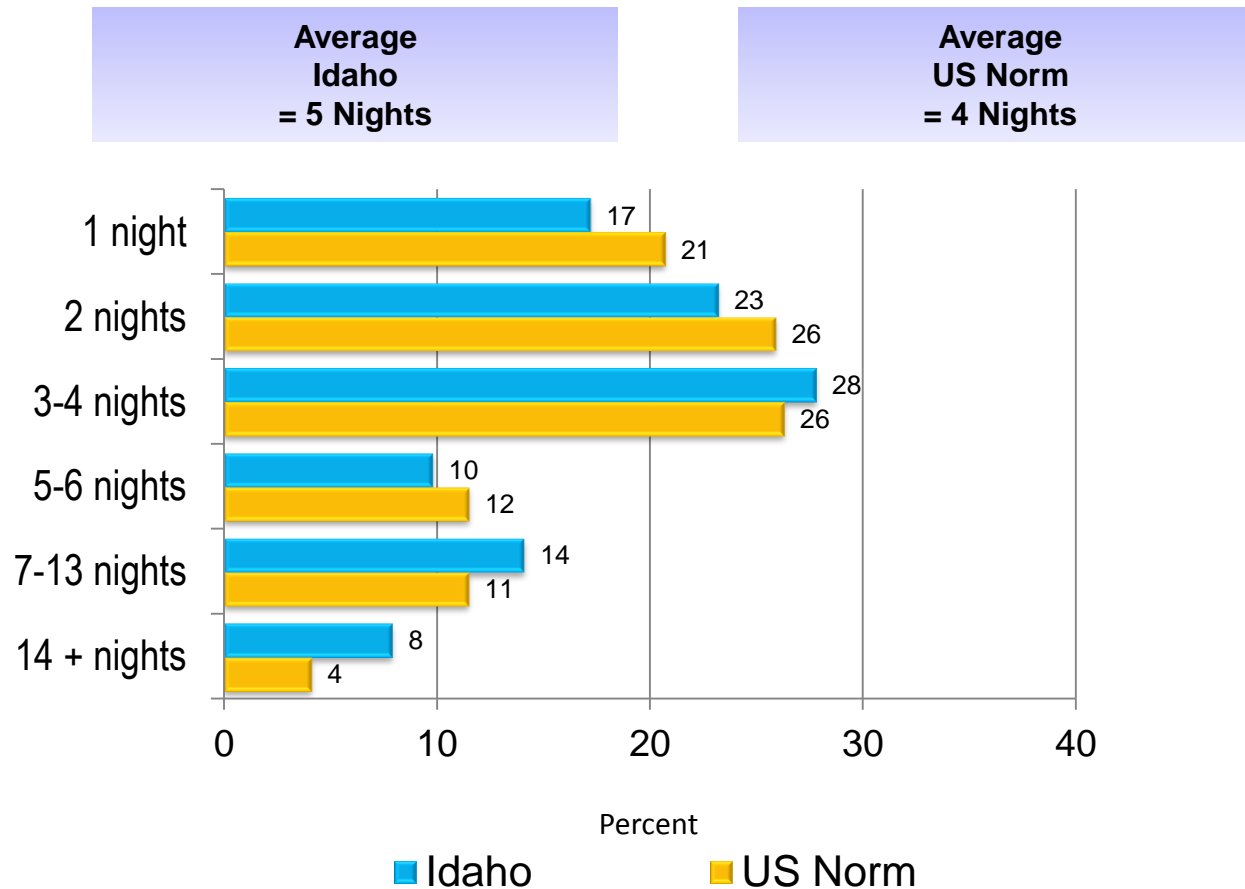
Base: Total Overnight Person-Trips



# Total Nights Away on Trip



Base: Total Overnight Person-Trips

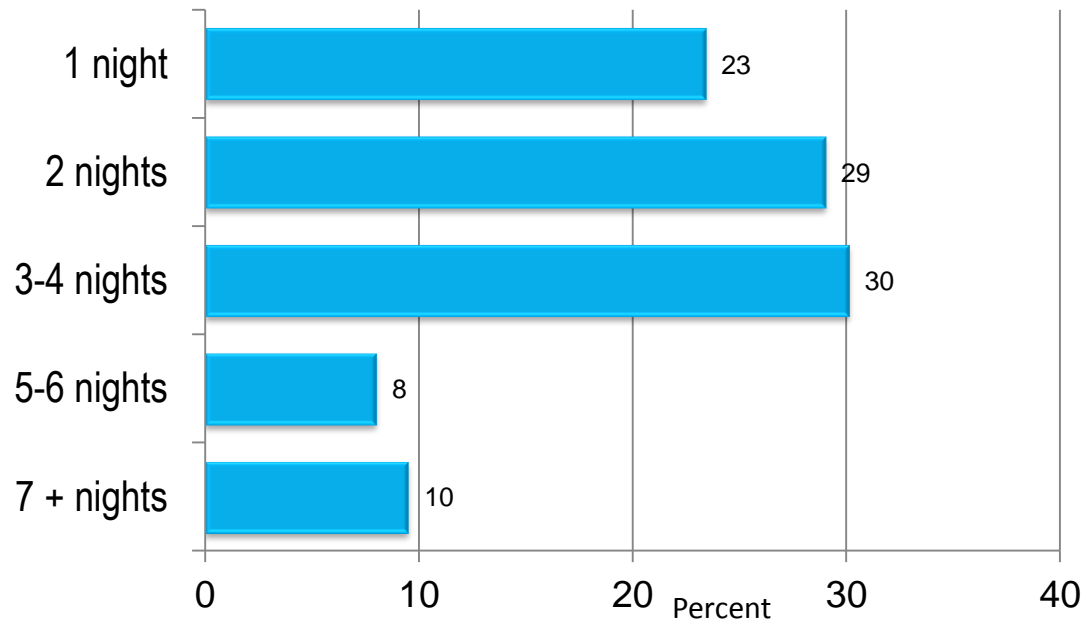


# Number of Nights Spent in Idaho



Base: Total Overnight Person-Trips with 1+ nights spent in Idaho

Average Nights Spent in Idaho = 3.3

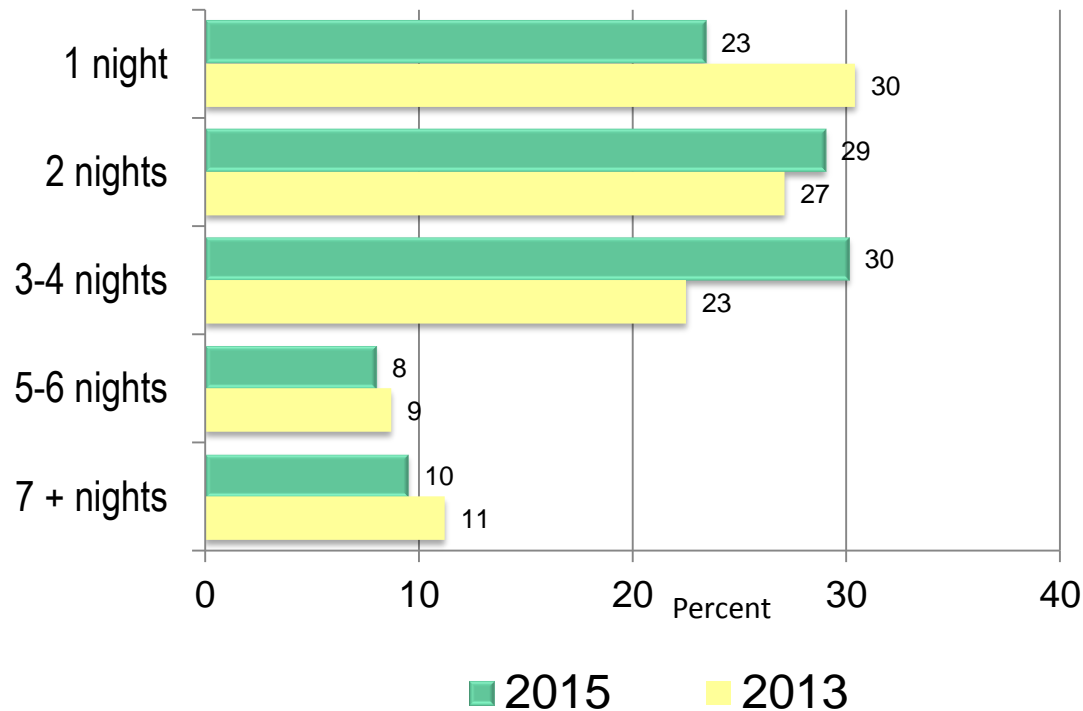


# Number of Nights Spent in Idaho



Base: Total Overnight Person-Trips with 1+ nights spent in Idaho

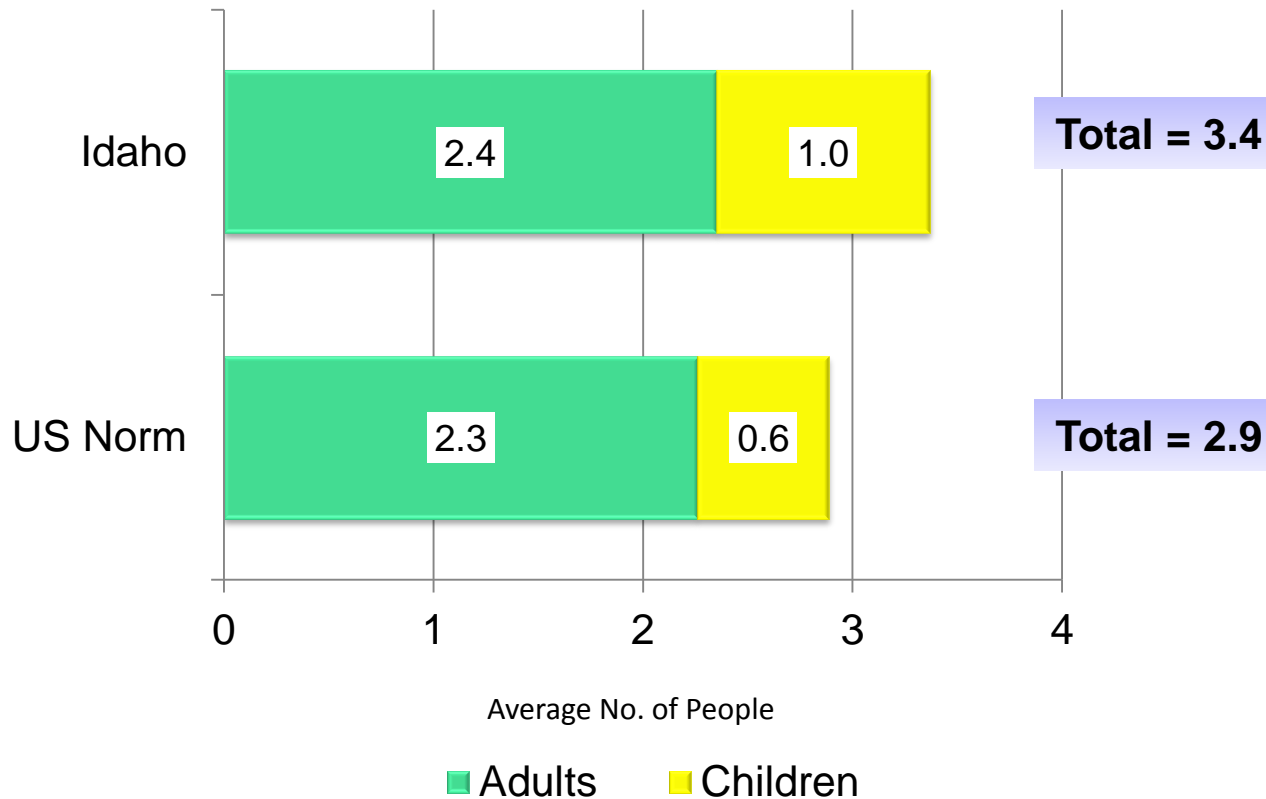
**Average Nights Spent in Idaho**  
2013 = 4.2      2015 = 3.3



# Size of Travel Party



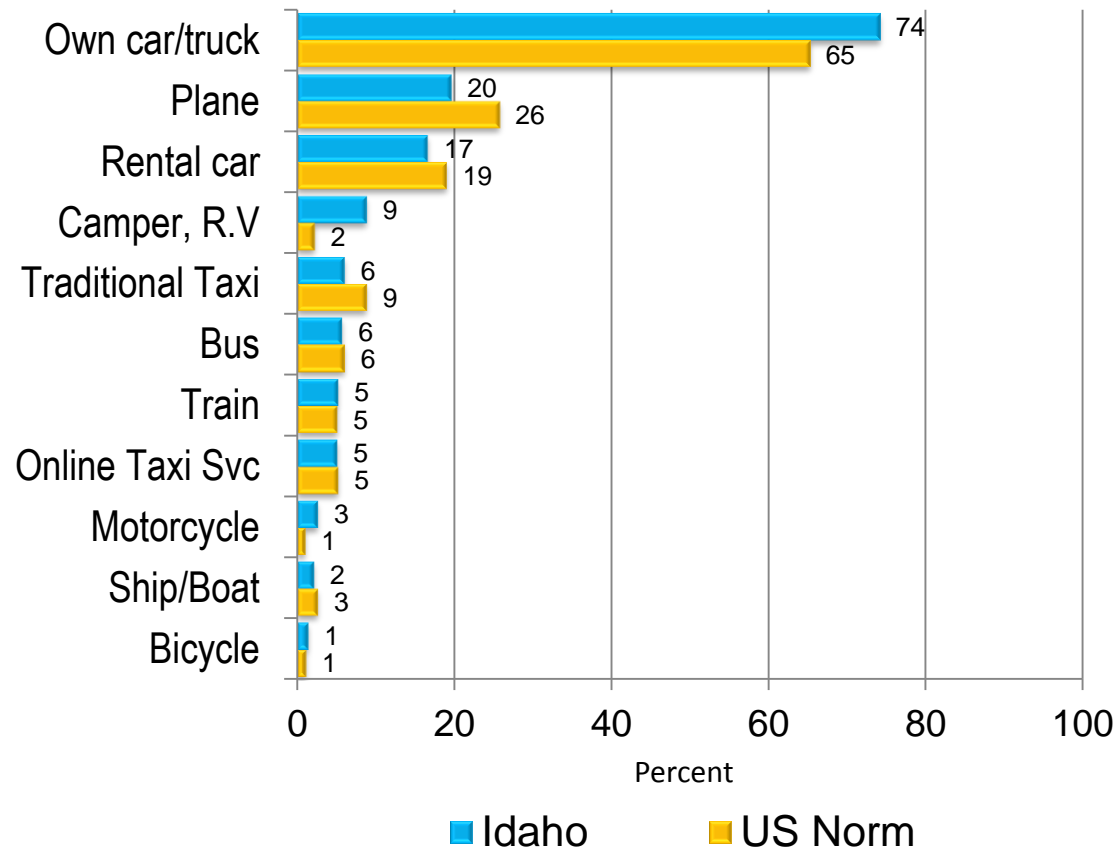
Base: Total Overnight Person-Trips



# Transportation



Base: Total Overnight Person-Trips

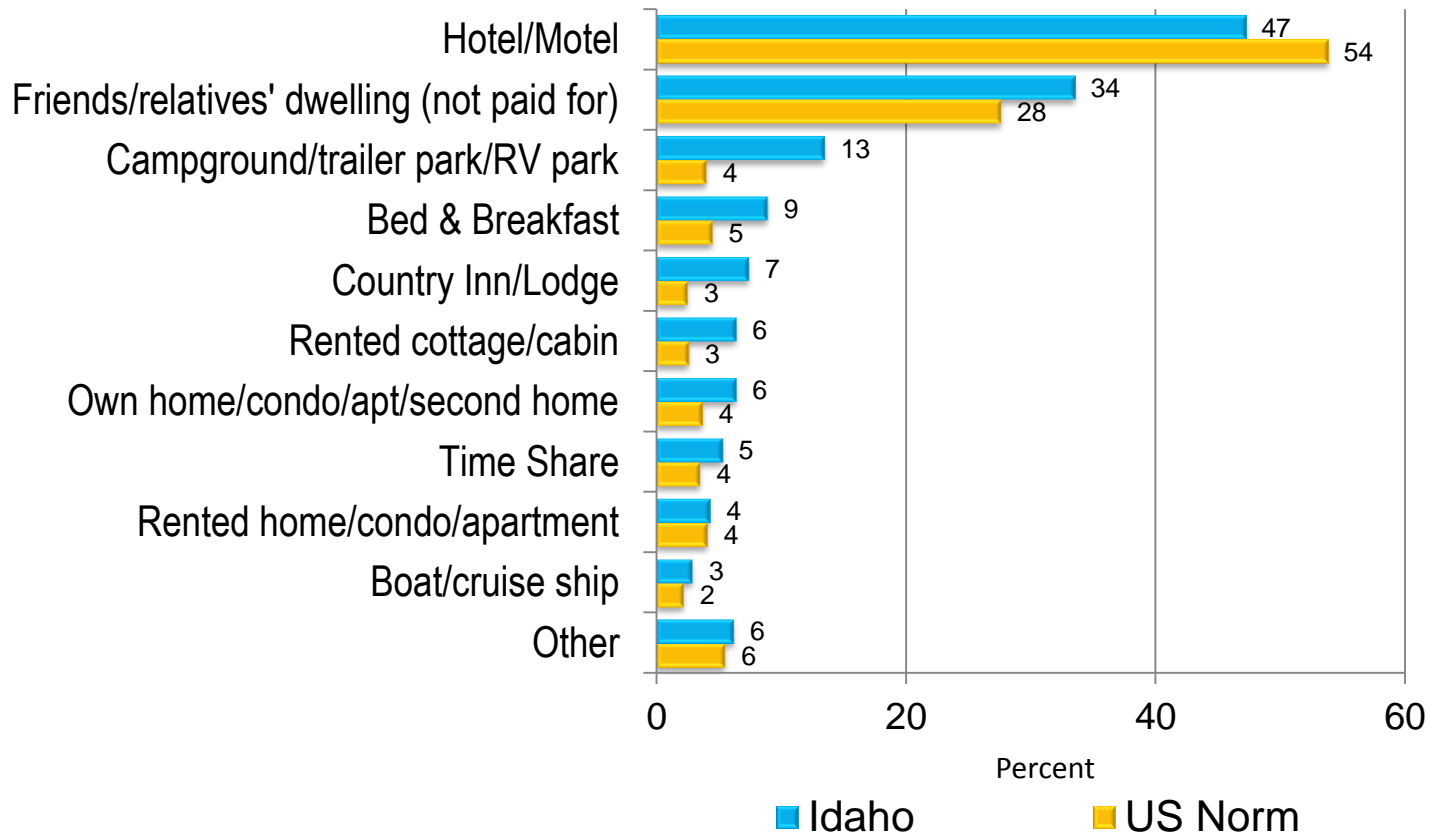




# Accommodation



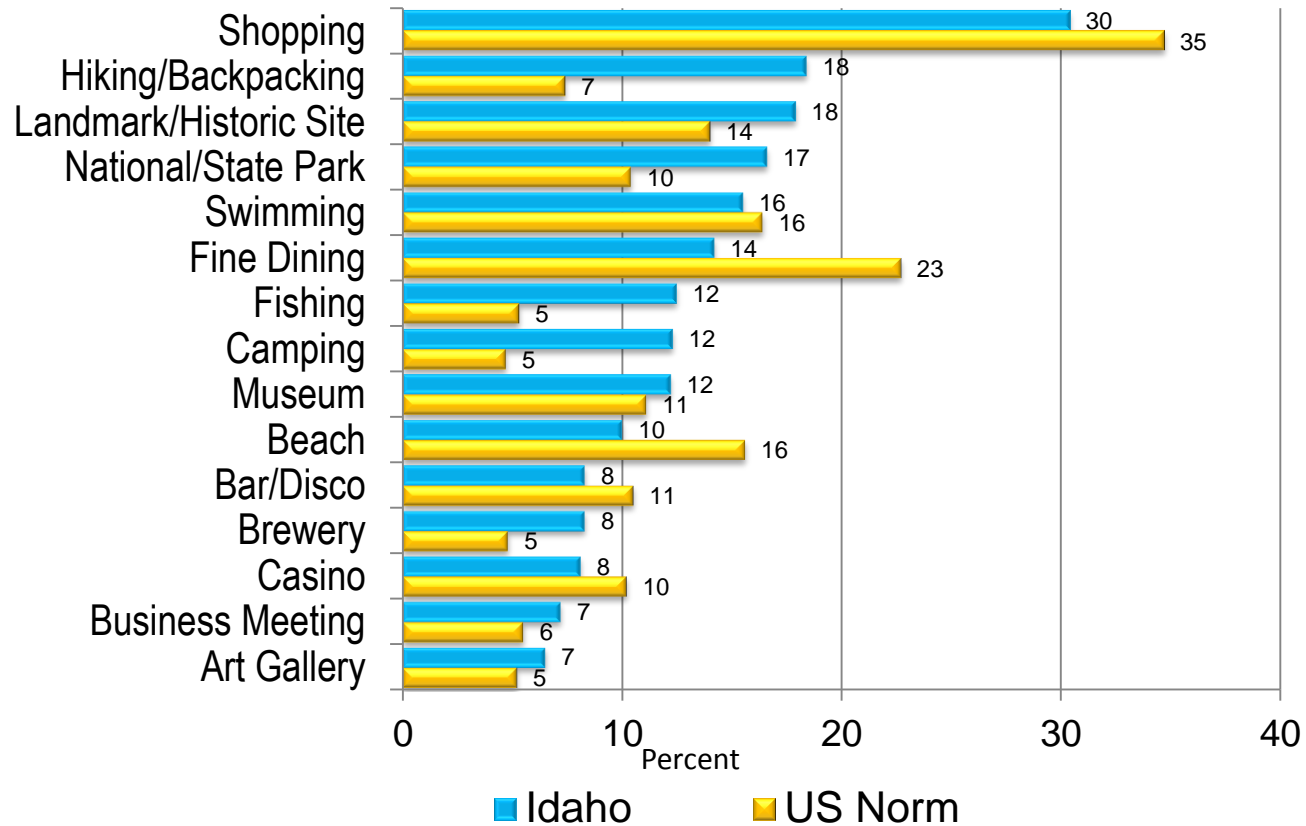
Base: Total Overnight Person-Trips



# Activities and Experiences



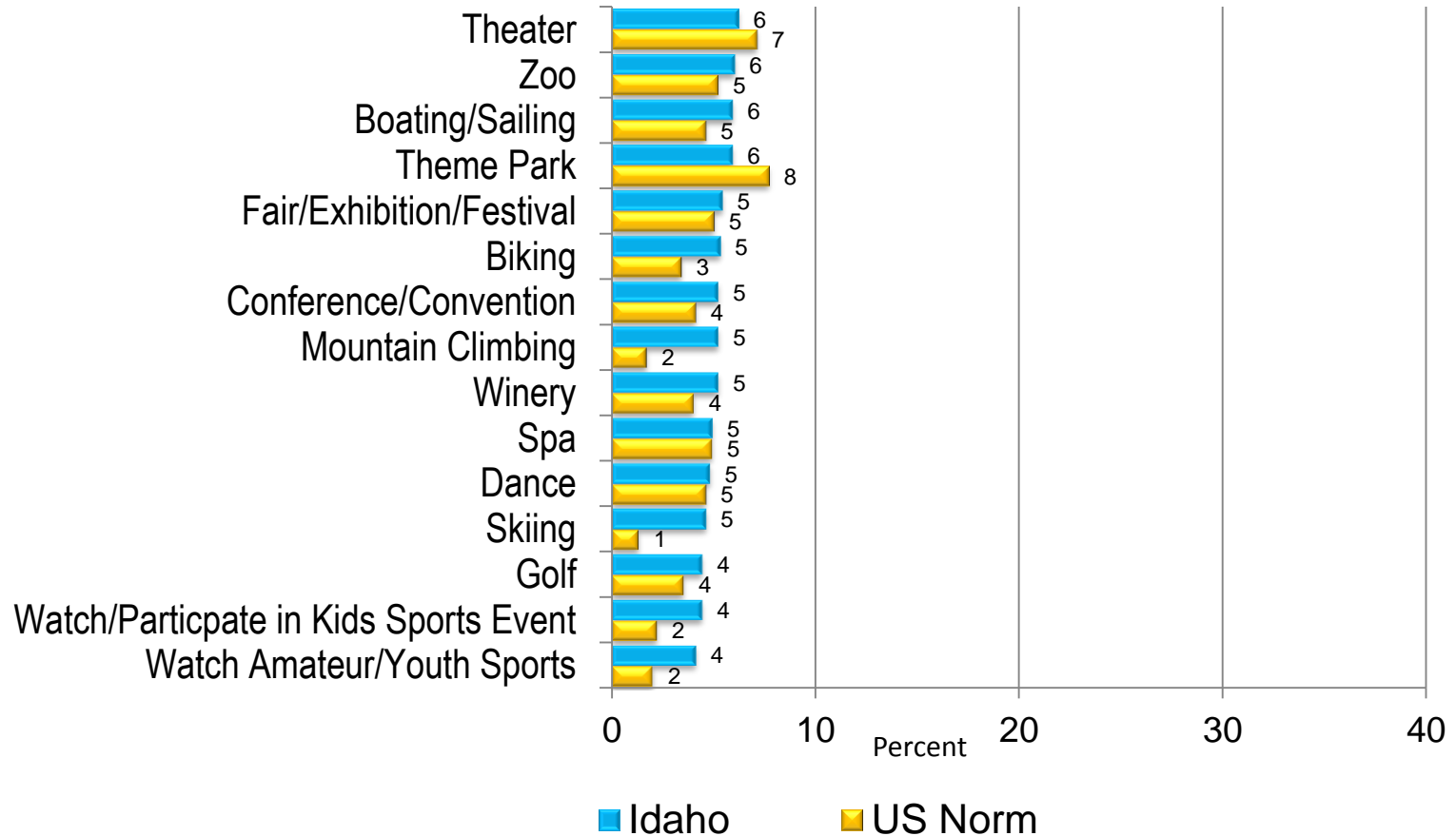
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# Activities and Experiences (Cont'd)



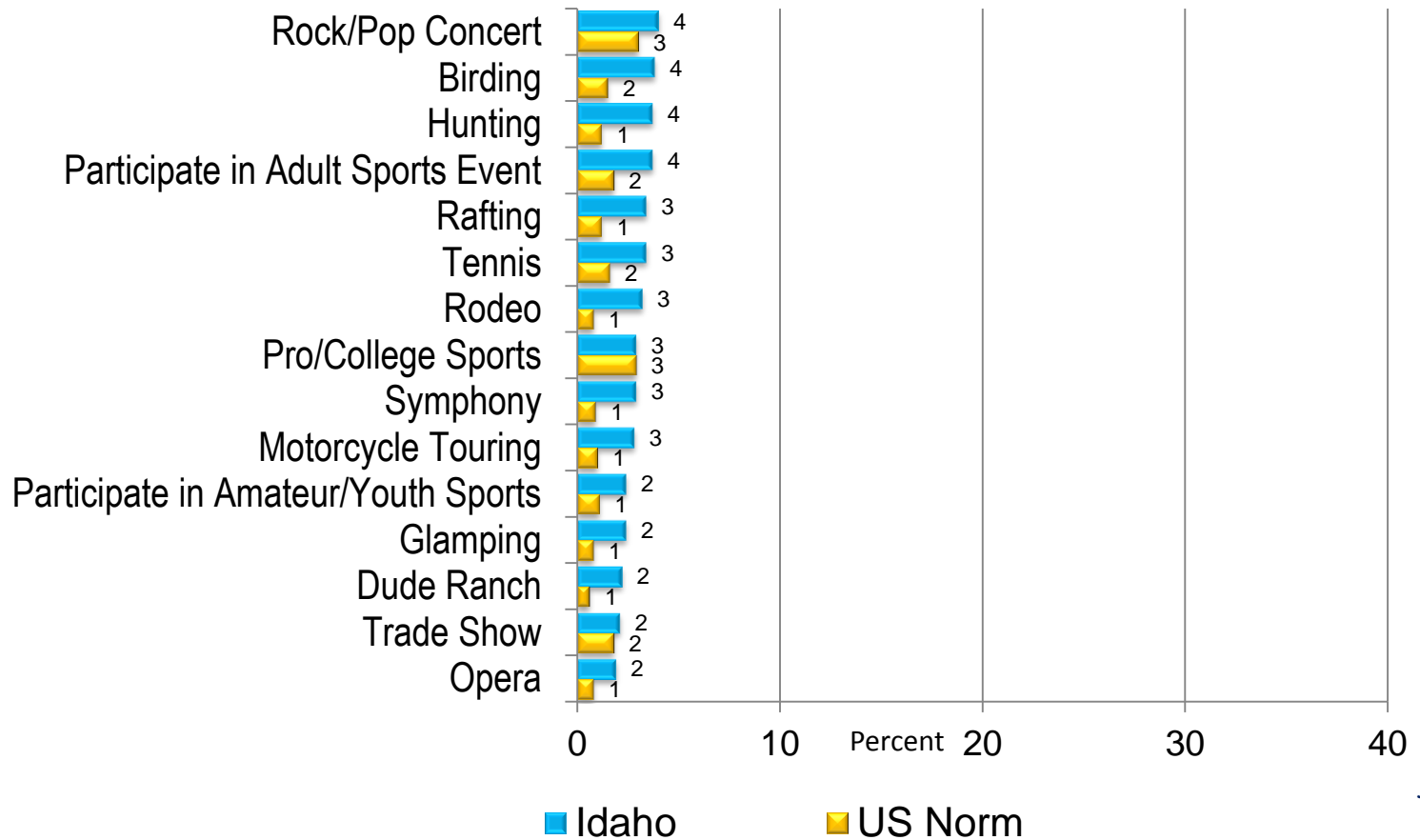
Base: Total Overnight Person-Trips



# Activities and Experiences (Cont'd)



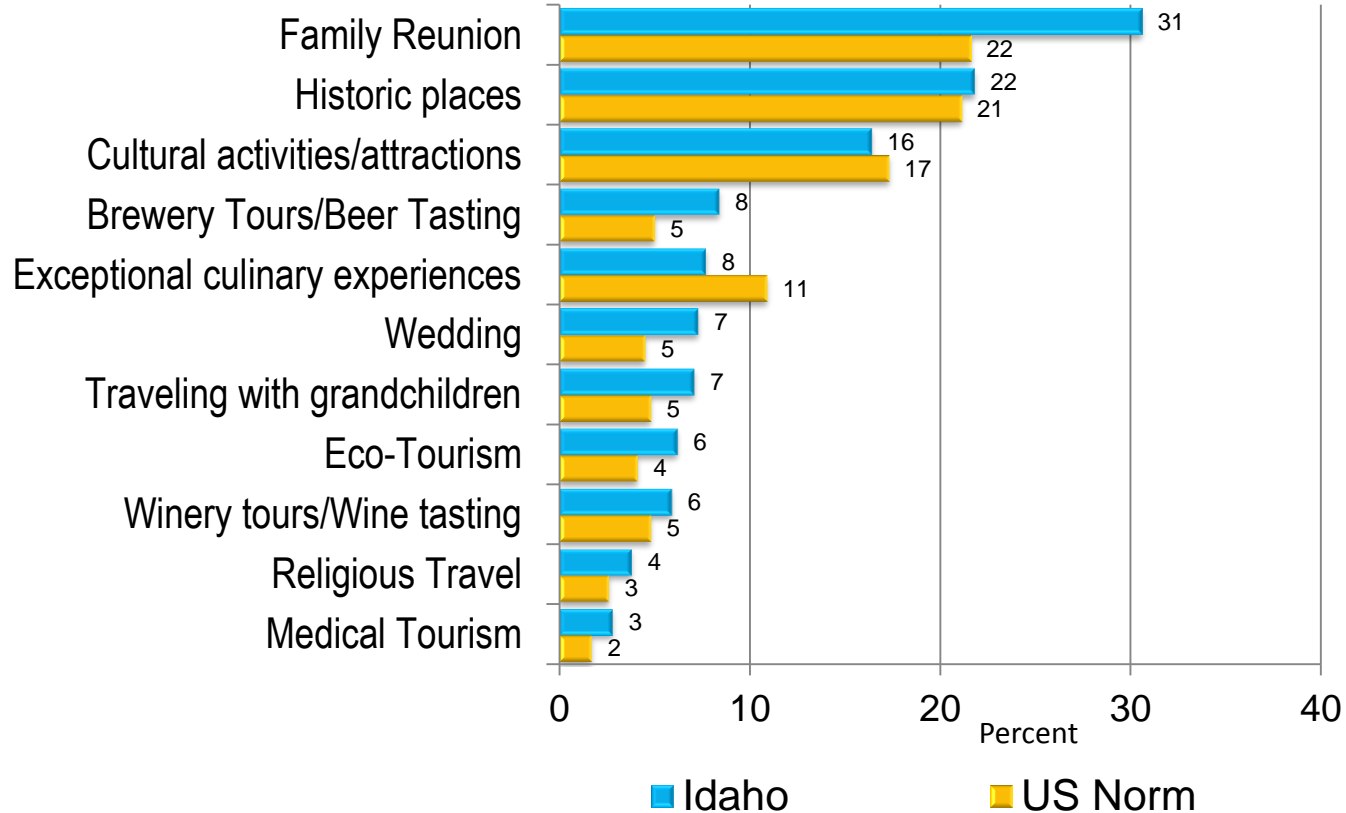
Base: Total Overnight Person-Trips



# Activities of Special Interest



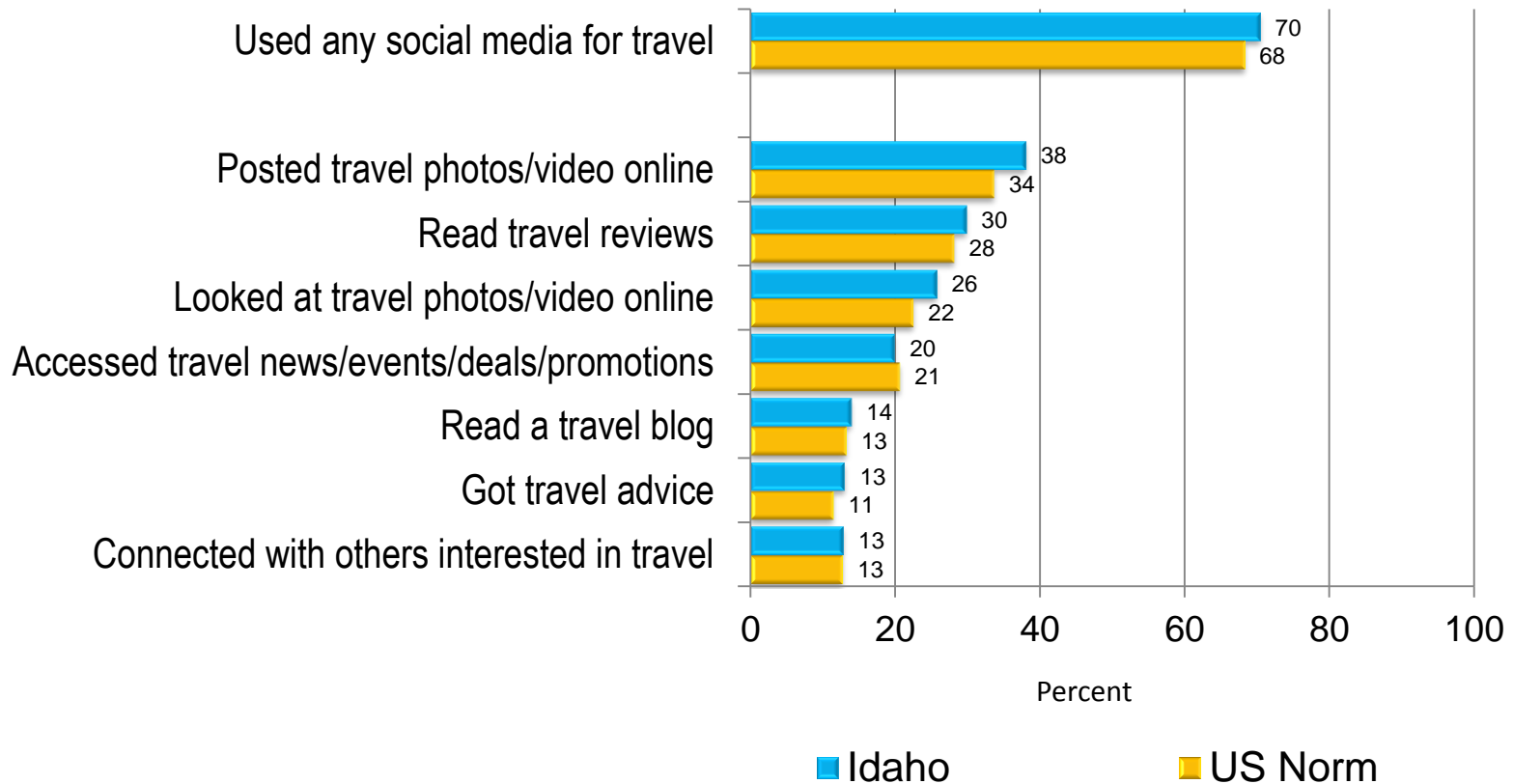
Base: Total Overnight Person-Trips



# Online Social Media Use by Travelers



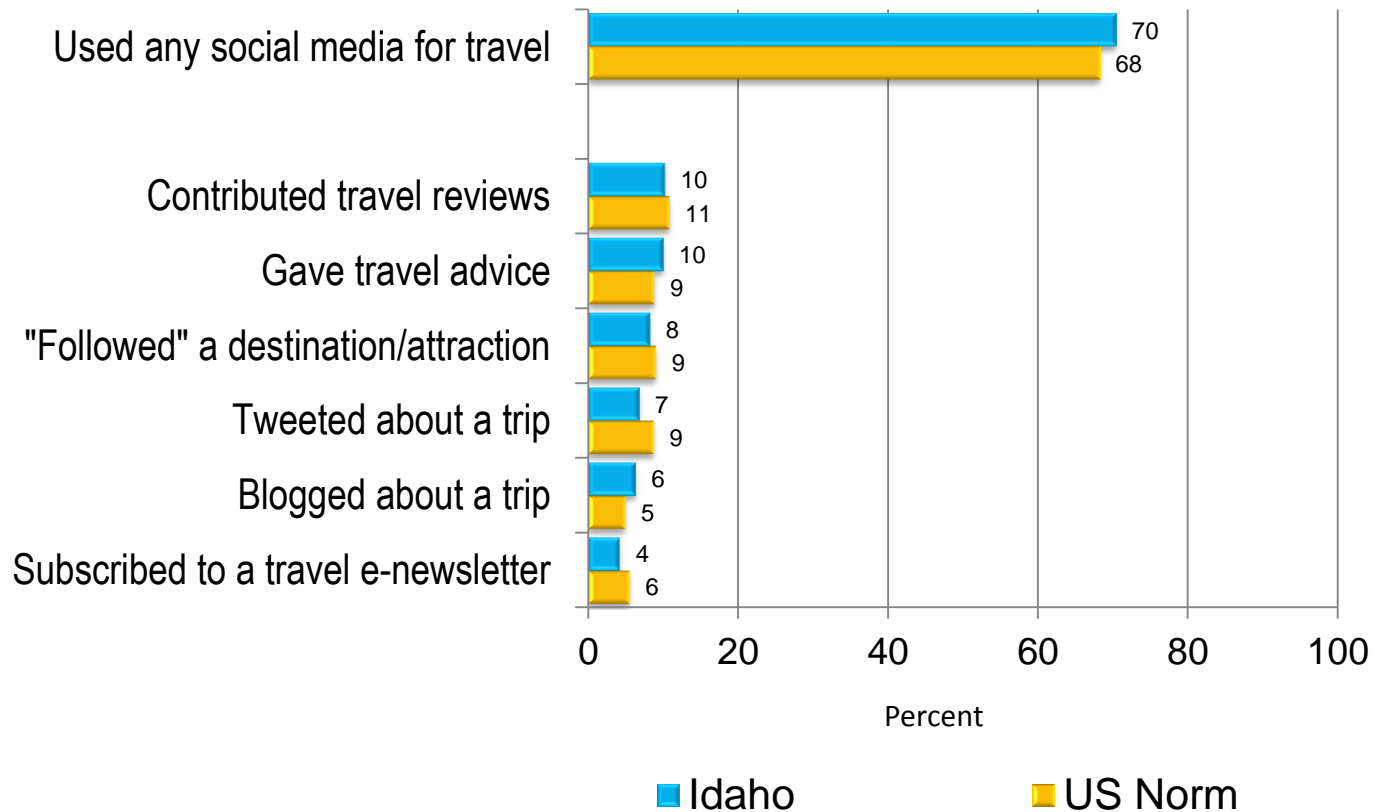
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# Online Social Media Use by Travelers (Cont'd)



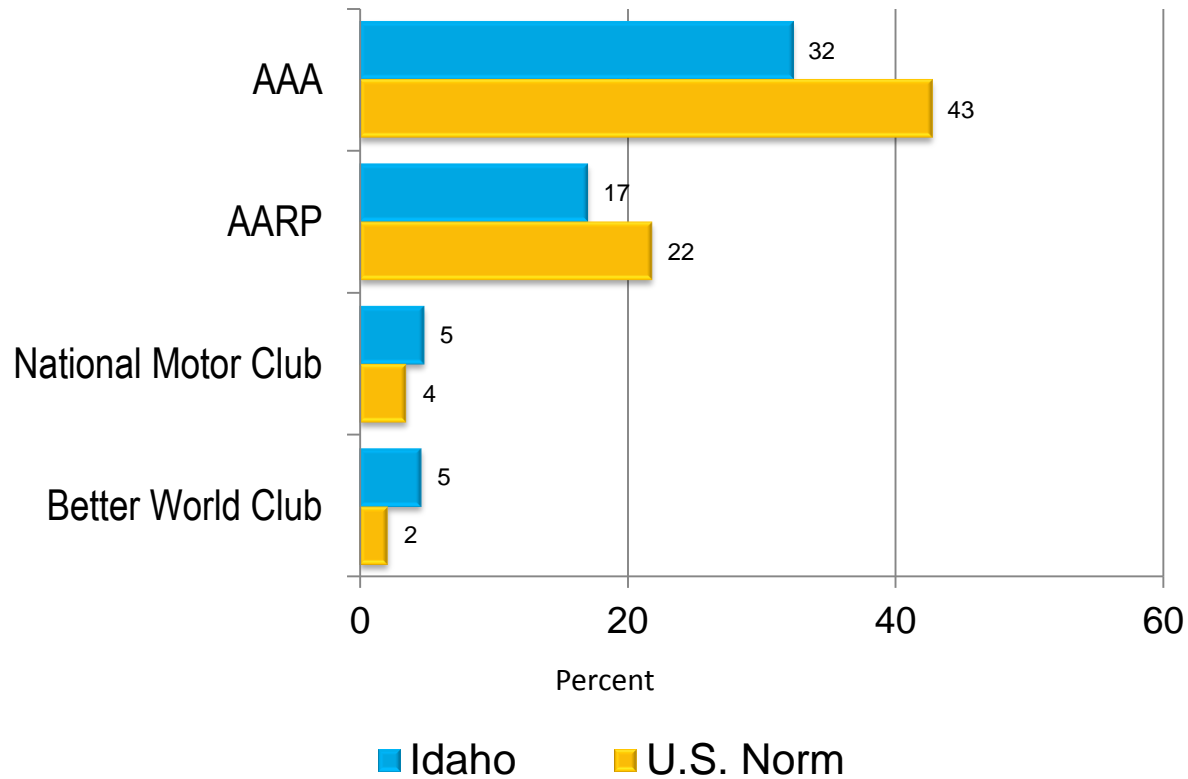
Base: Total Overnight Person-Trips



# Organization Membership



Base: Total Overnight Person-Trips





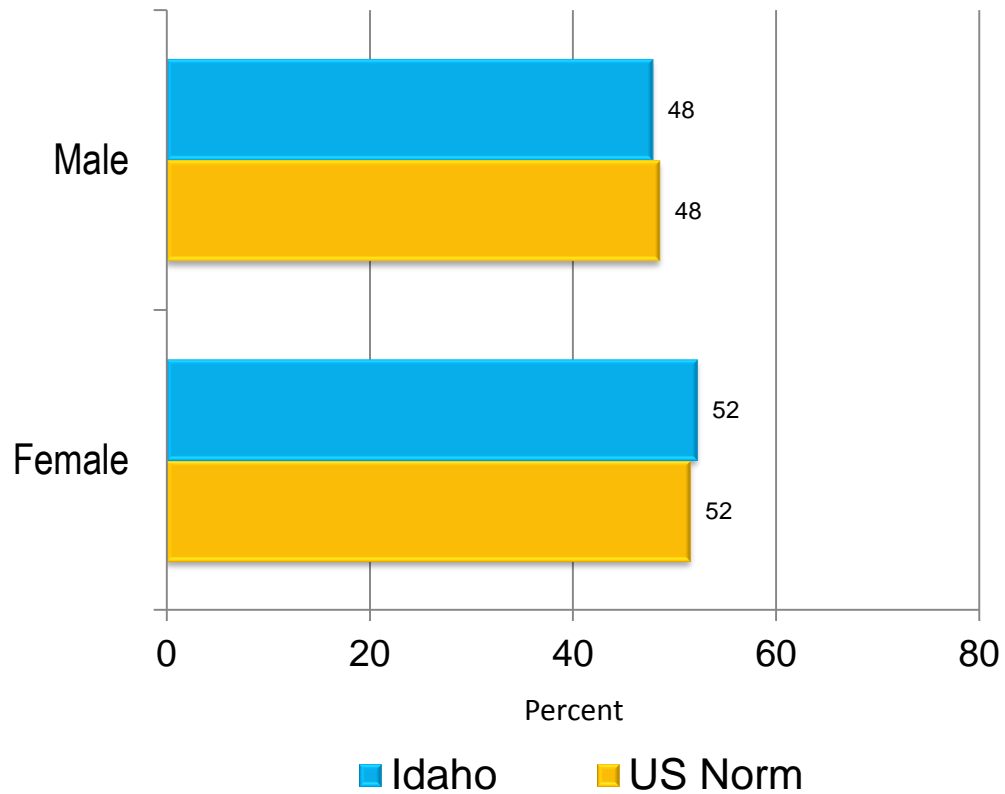


# Demographic Profile of Overnight Visitors to Idaho

# Gender



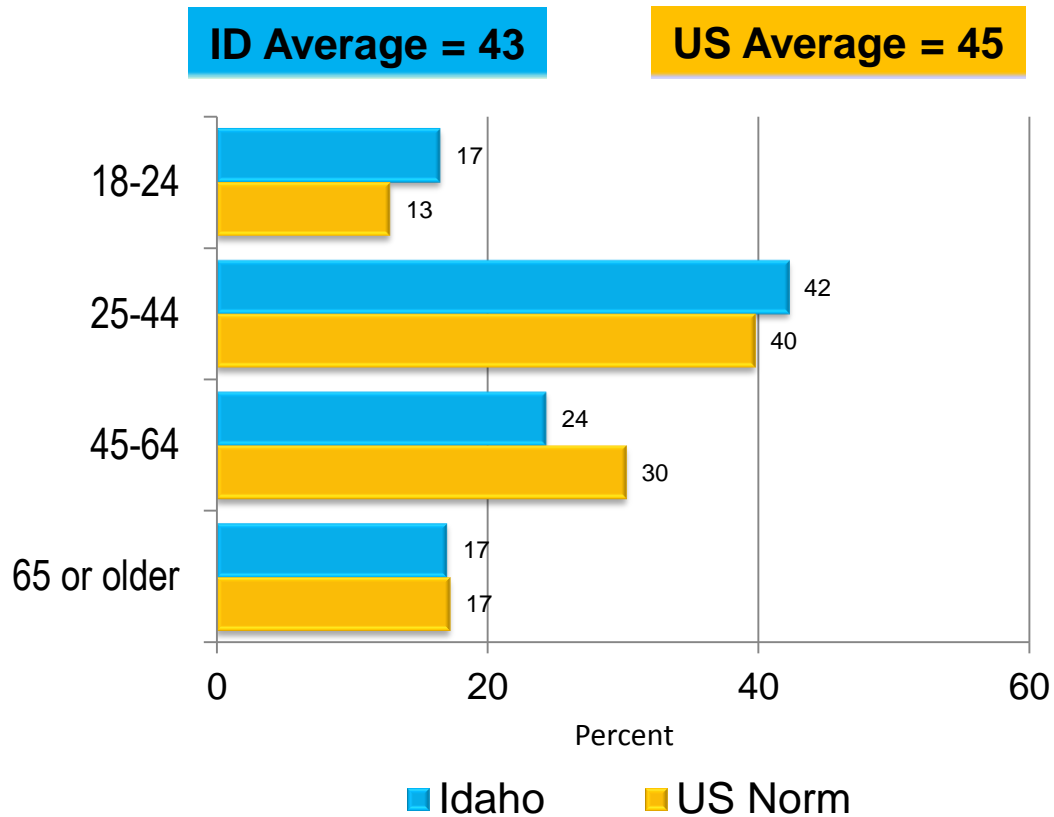
Base: Total Overnight Person-Trips



# Age



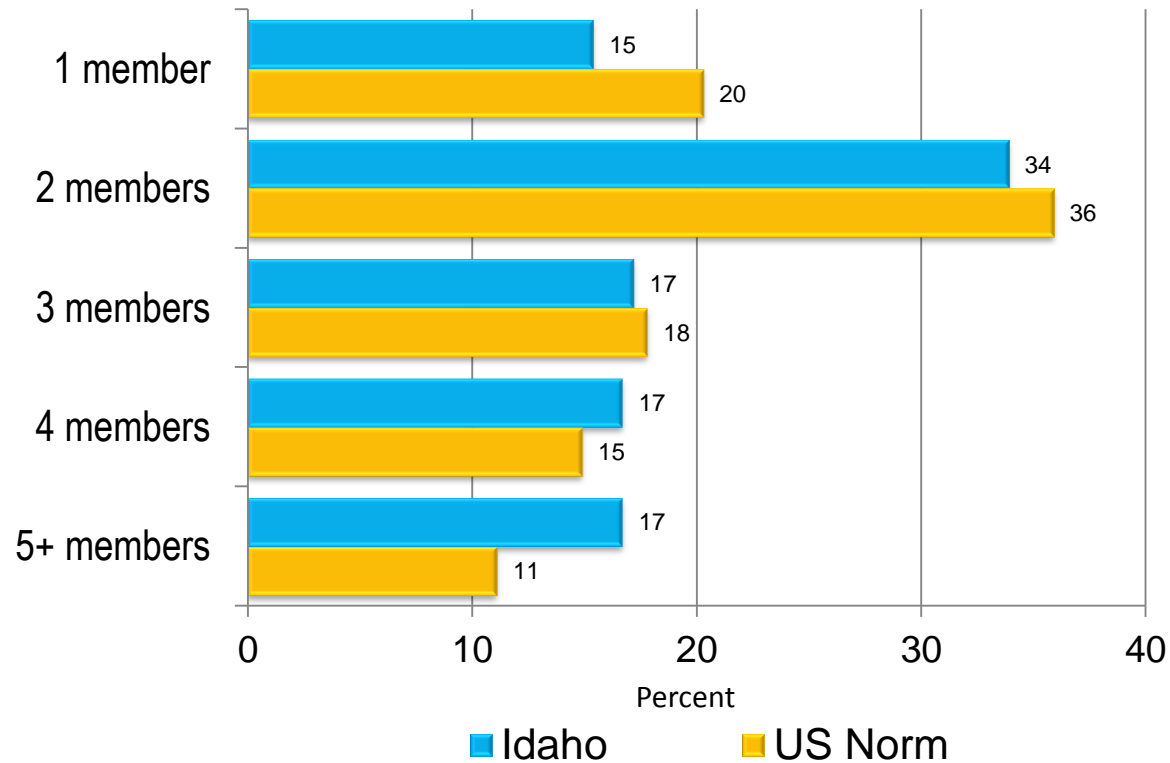
Base: Total Overnight Person-Trips



# Household Size



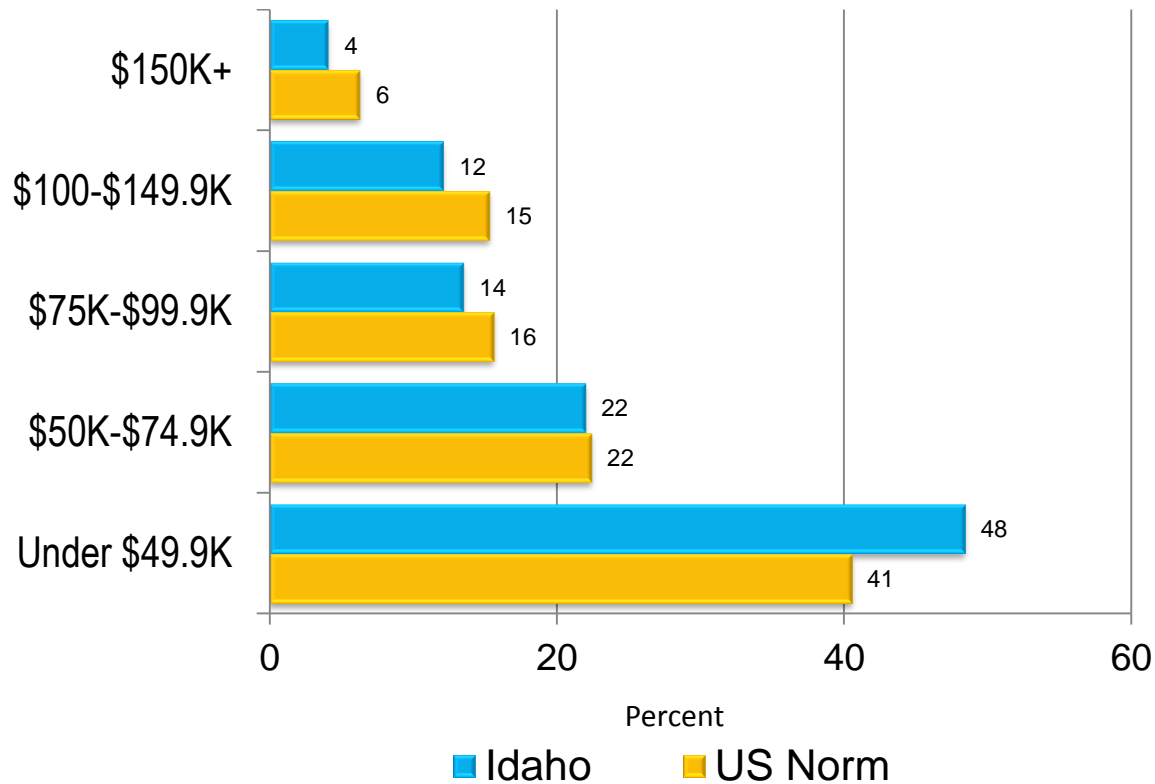
Base: Total Overnight Person-Trips



# Household Income



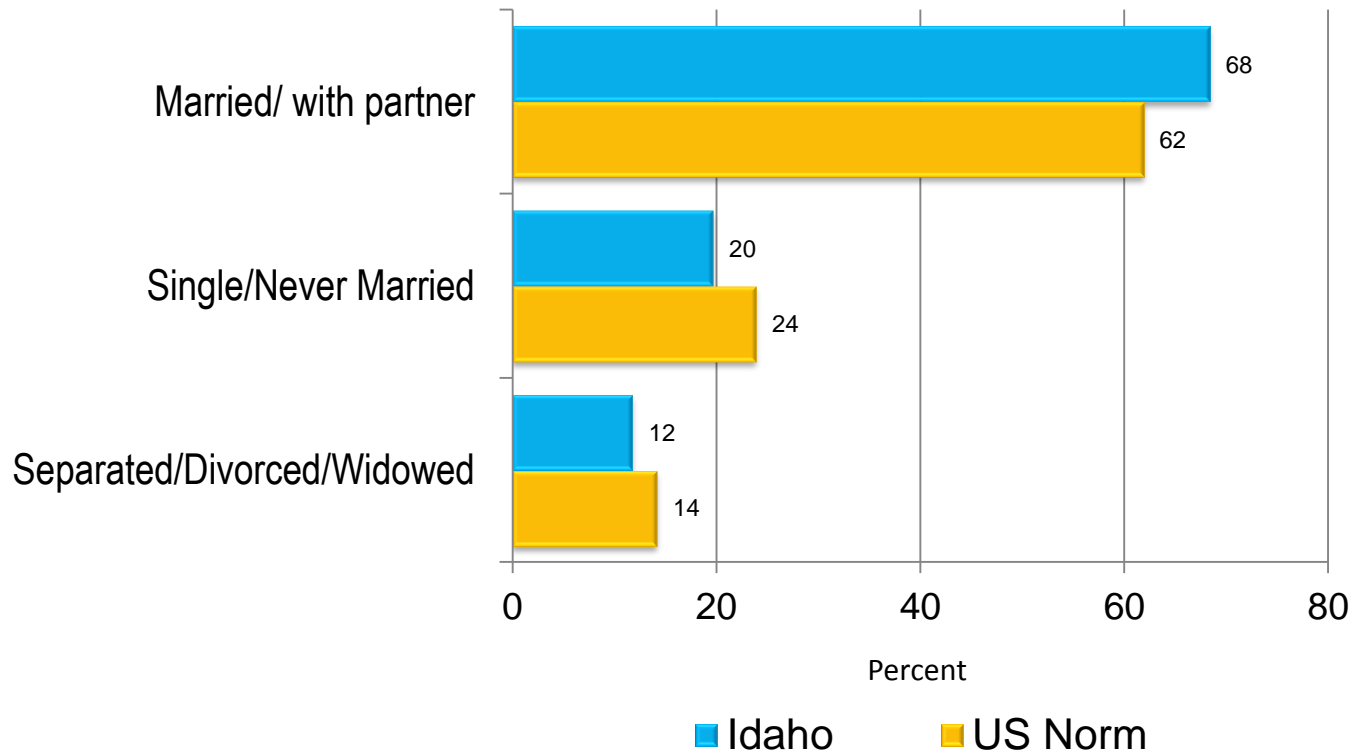
Base: Total Overnight Person-Trips



# Marital Status



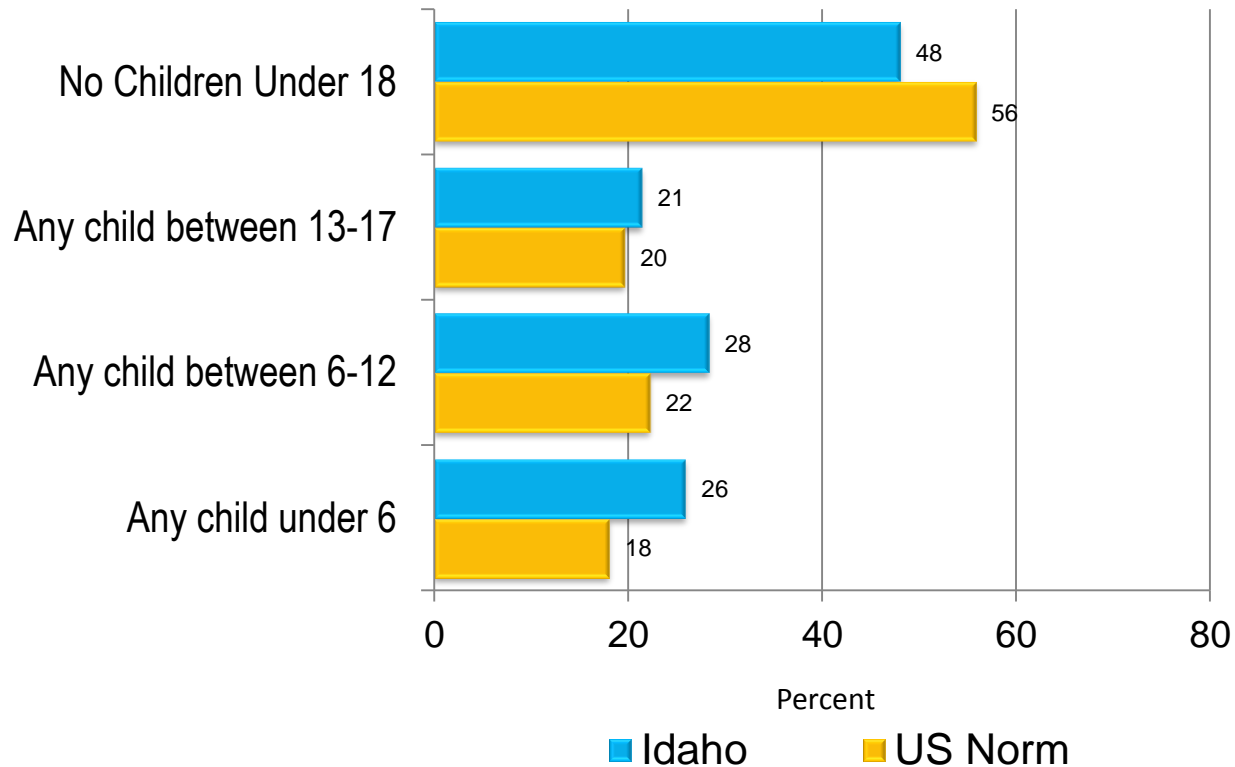
Base: Total Overnight Person-Trips



# Children in Household



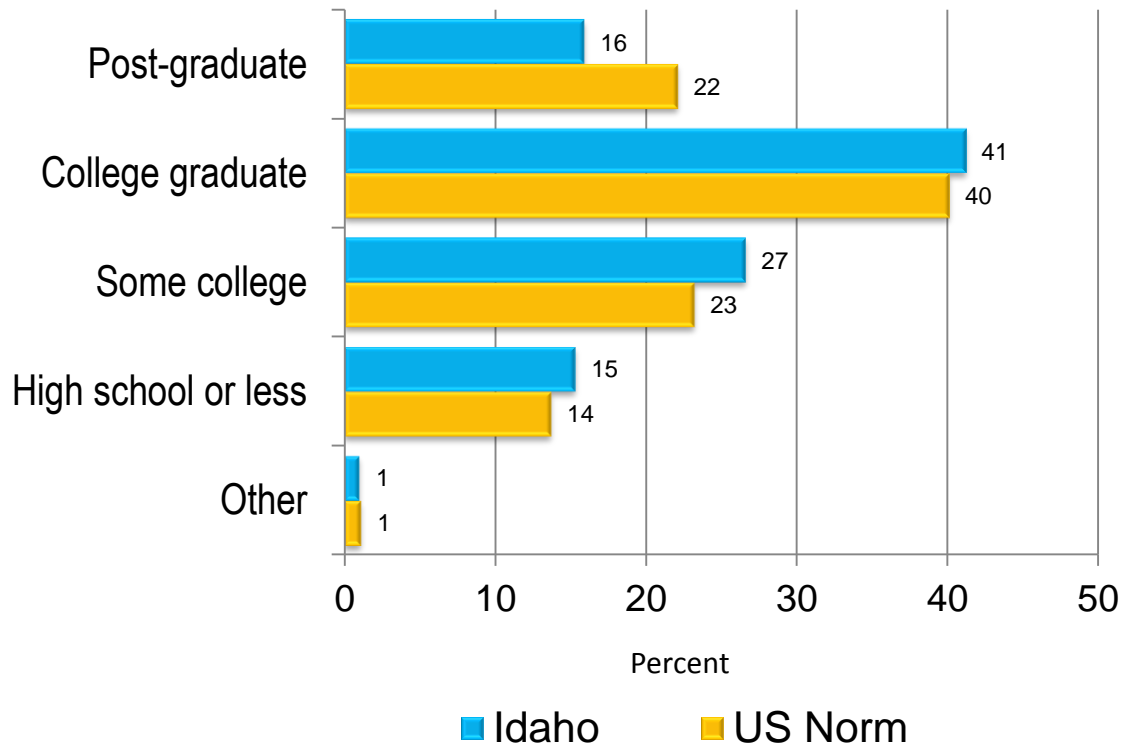
Base: Total Overnight Person-Trips



# Education



Base: Total Overnight Person-Trips

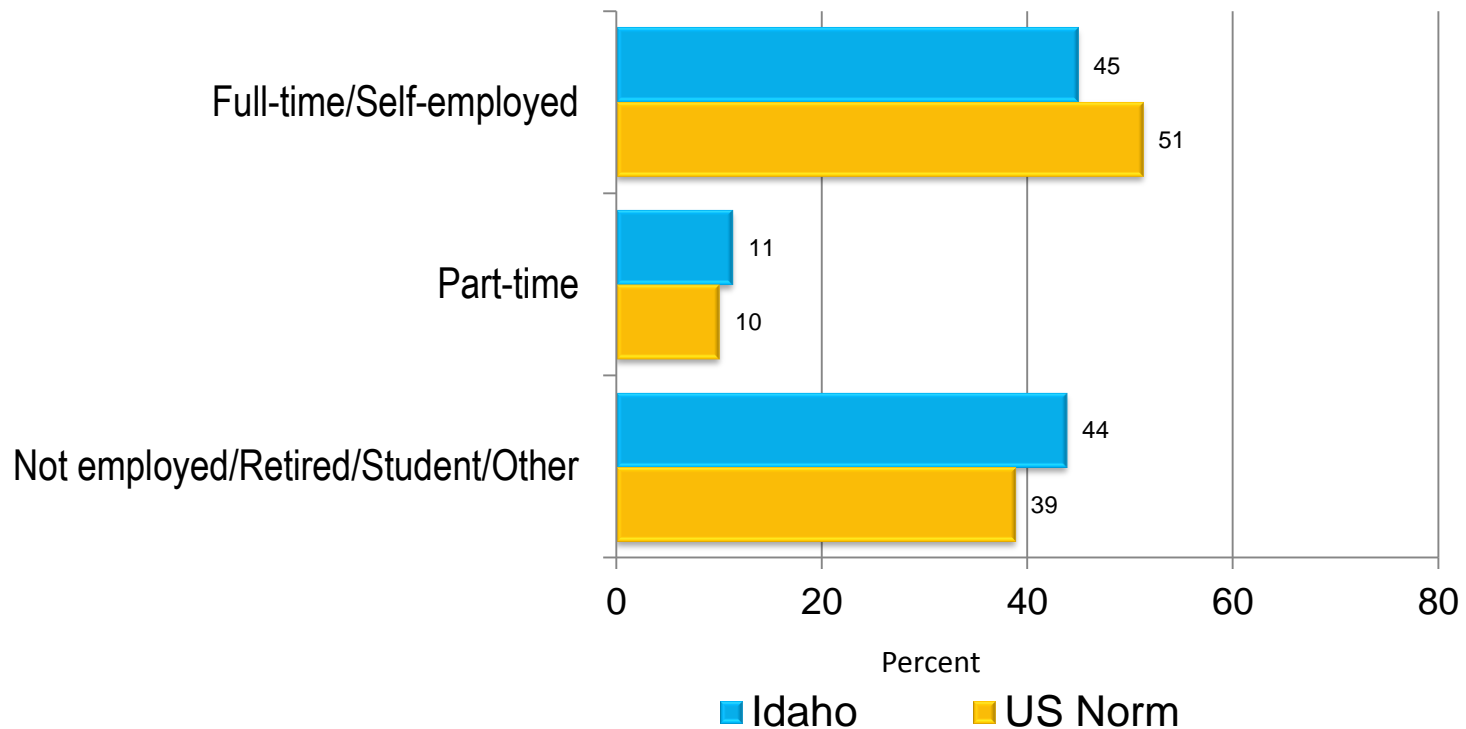




# Employment



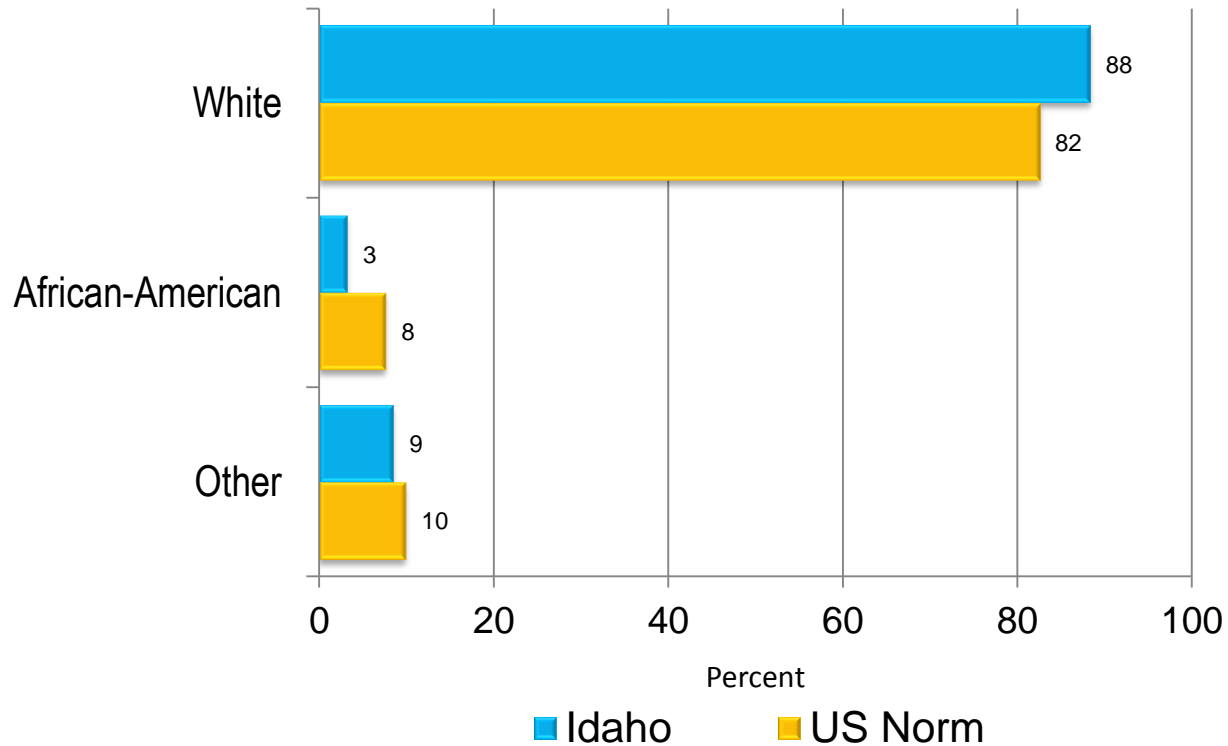
Base: Total Overnight Person-Trips



# Race



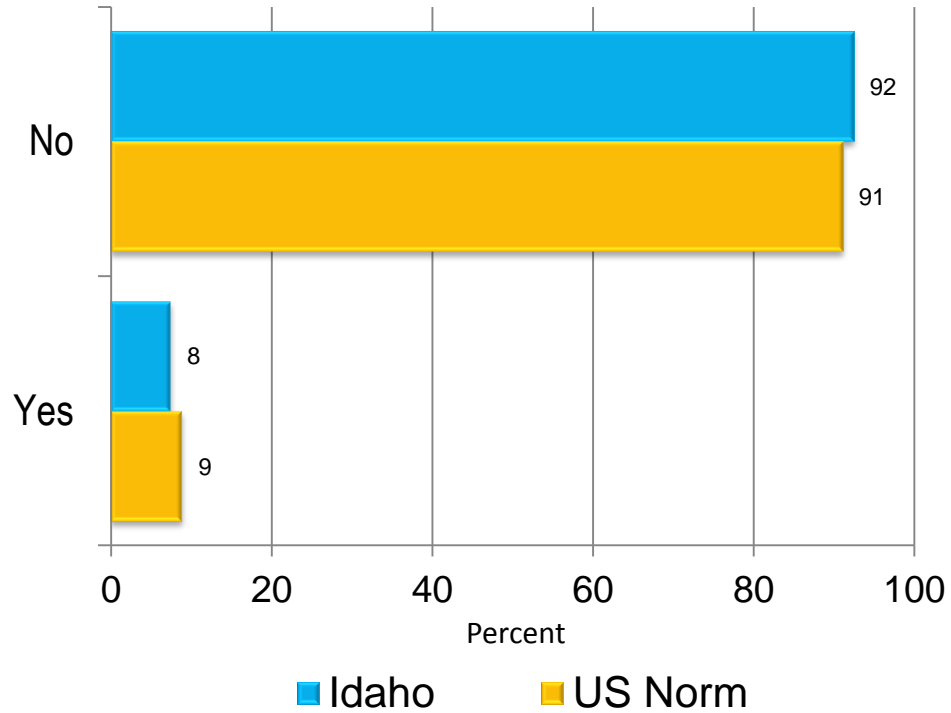
Base: Total Overnight Person-Trips



# Hispanic Background



Base: Total Overnight Person-Trips





# Overnight Marketable Leisure Trip Detail

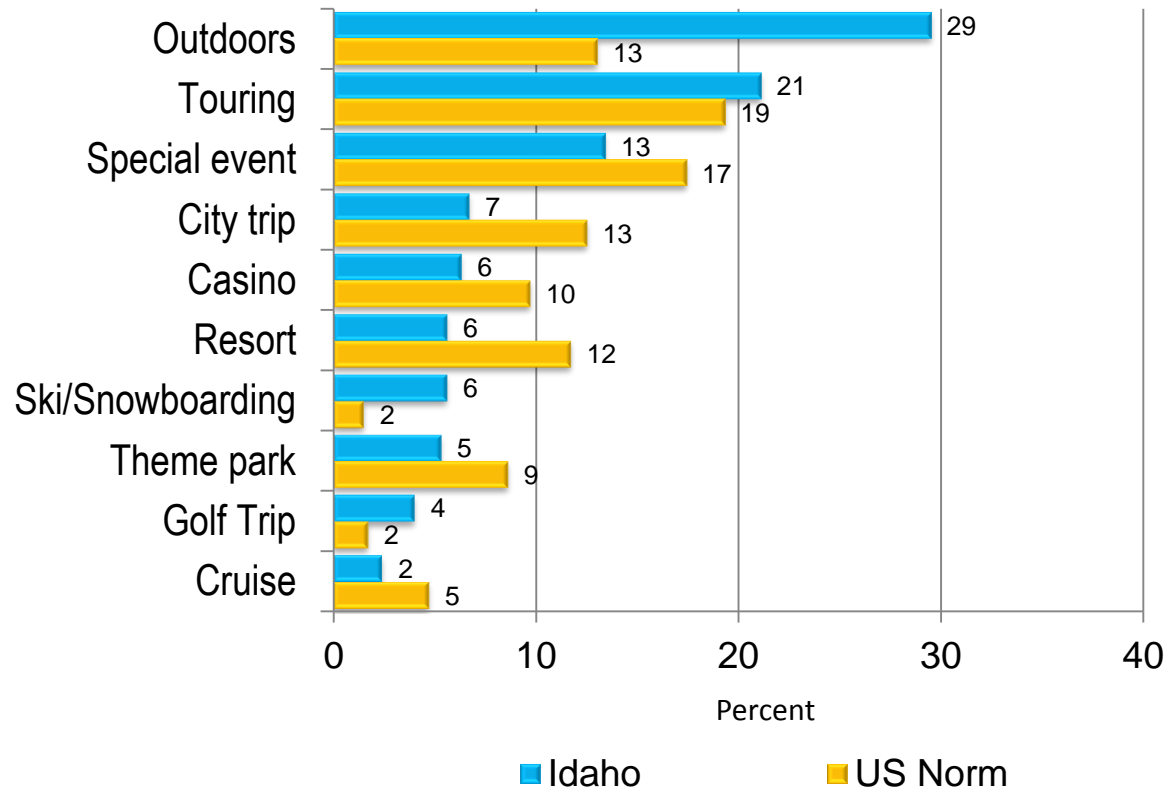


# Overnight Marketable Leisure Trip Characteristics

# Main Purpose of Overnight Leisure Trip – Idaho vs. National Norm



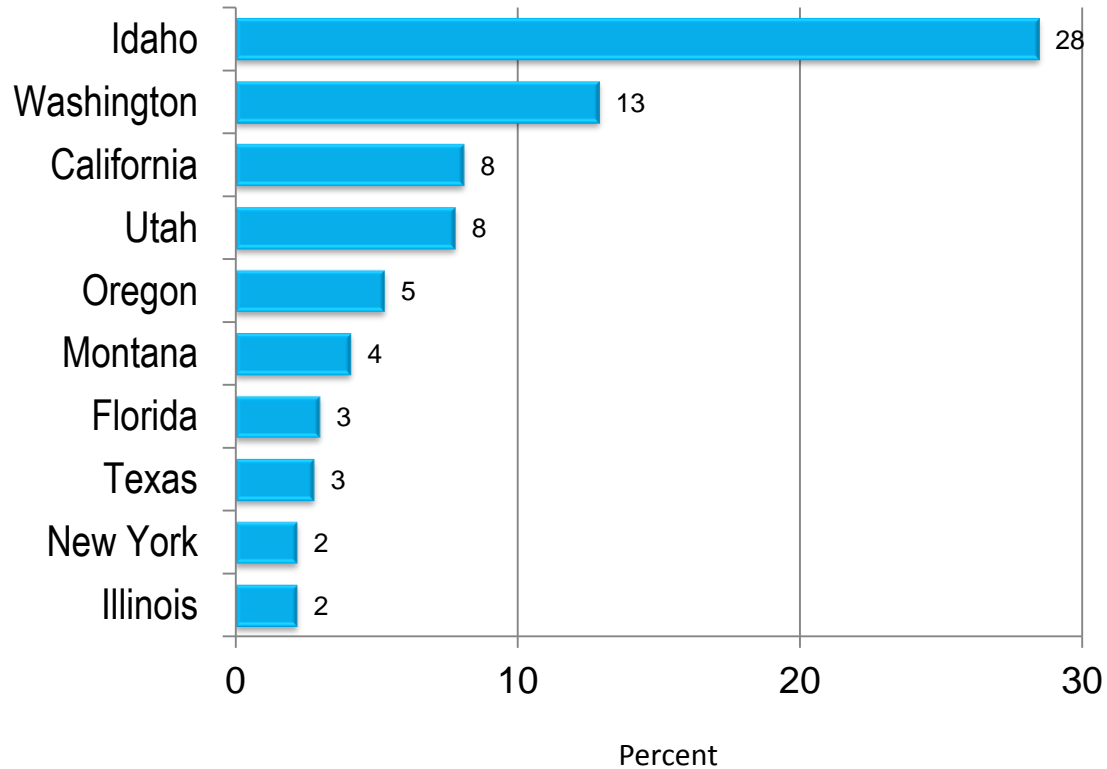
Base: Total Overnight Marketable Person-Trips



# State Origin Of Trip



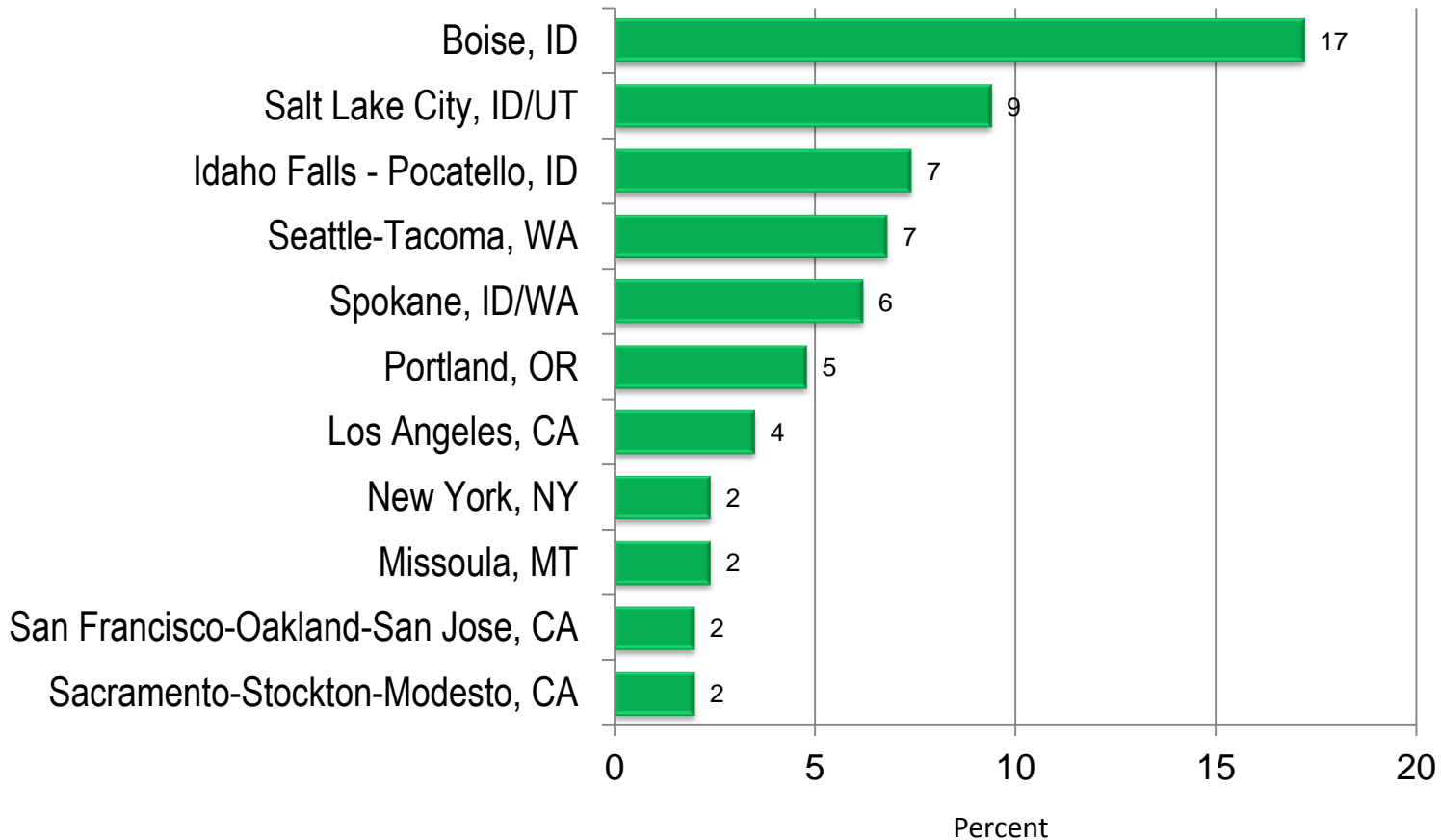
Base: Total Overnight Marketable Person-Trips



# DMA Origin Of Trip



Base: Total Overnight Marketable Person-Trips



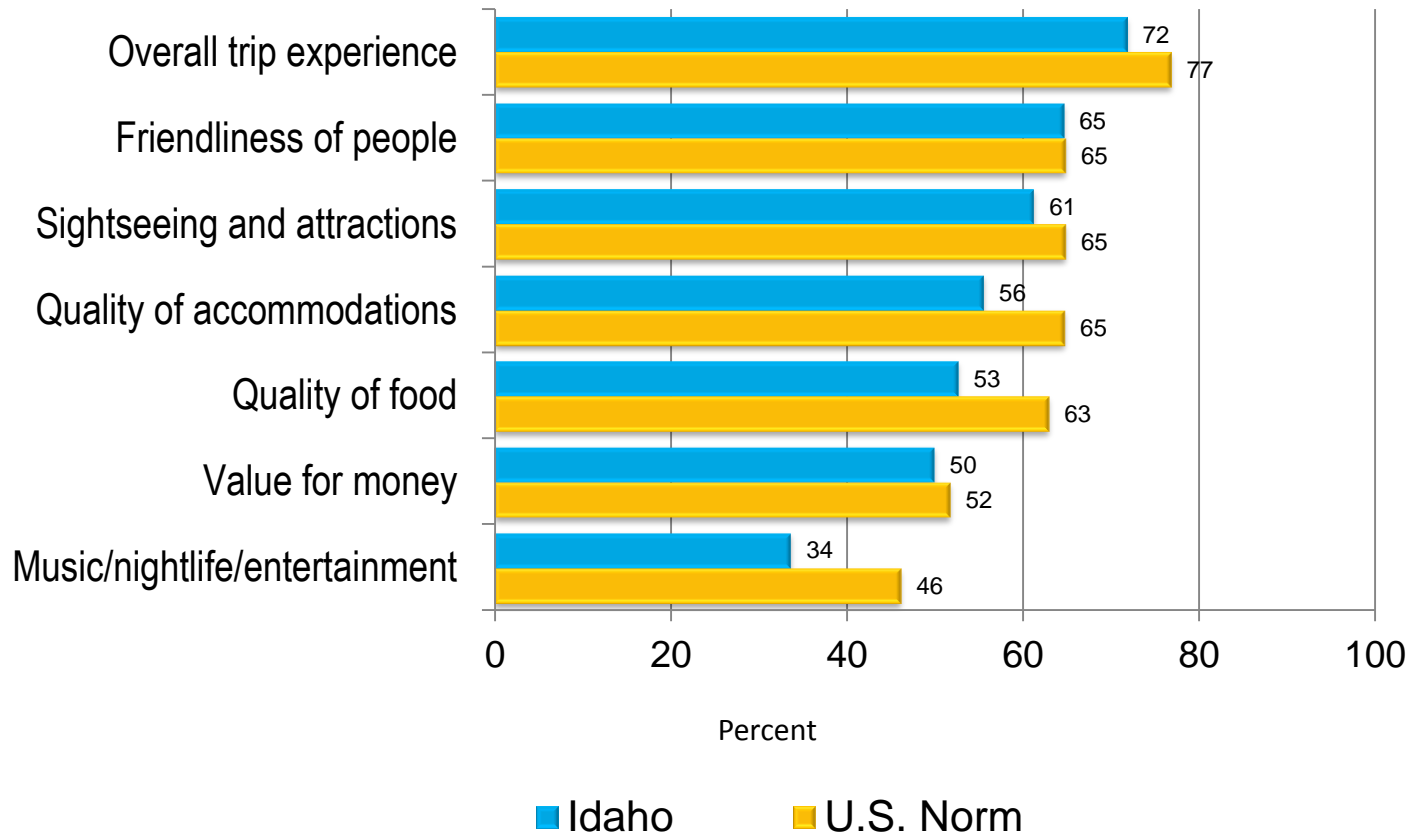


# Satisfaction with Idaho Trip

## % Very Satisfied



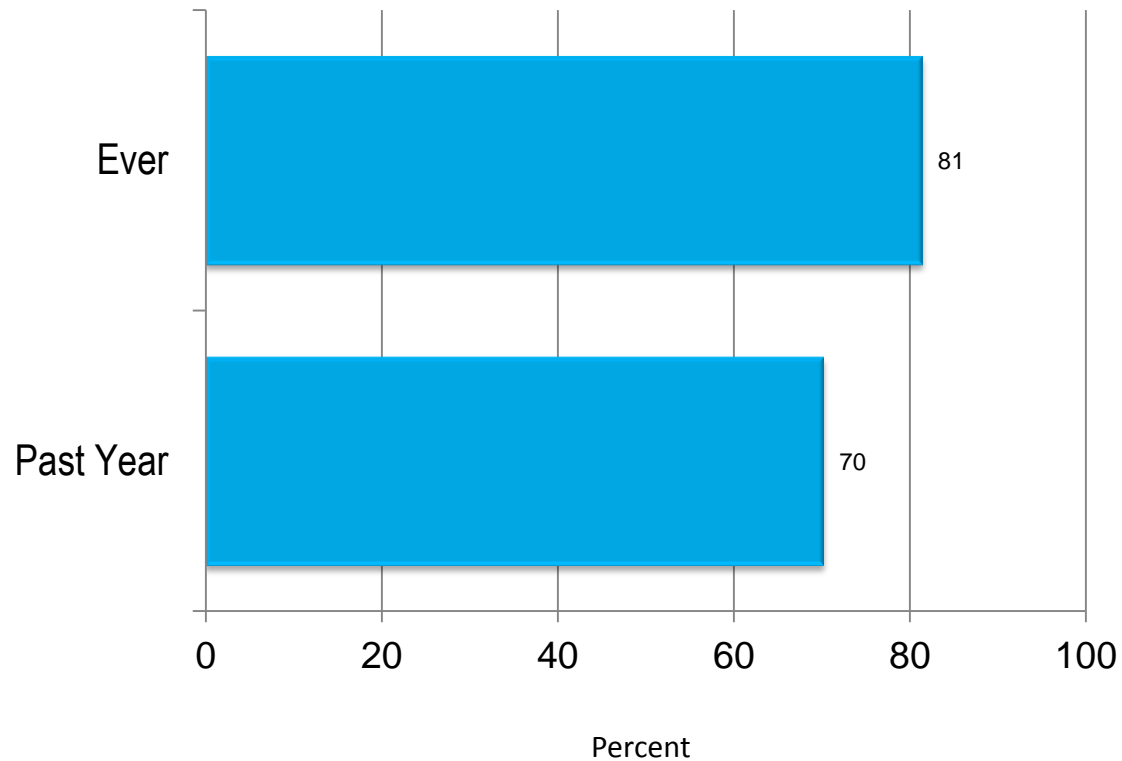
Base: Total Overnight Marketable Person-Trips



# Past Visitation to Idaho



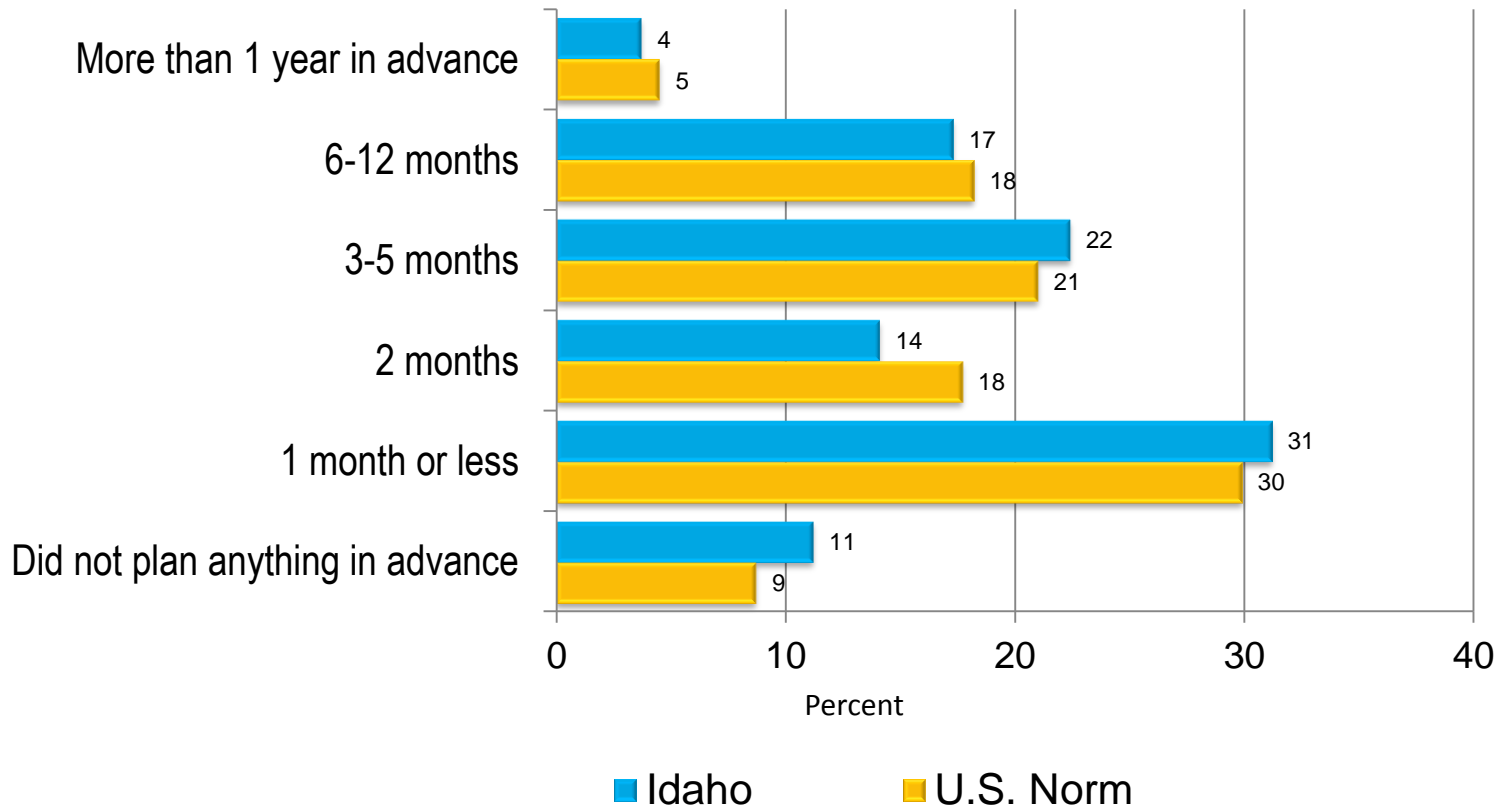
Base: Total Overnight Marketable Person-Trips



# Length of Trip Planning



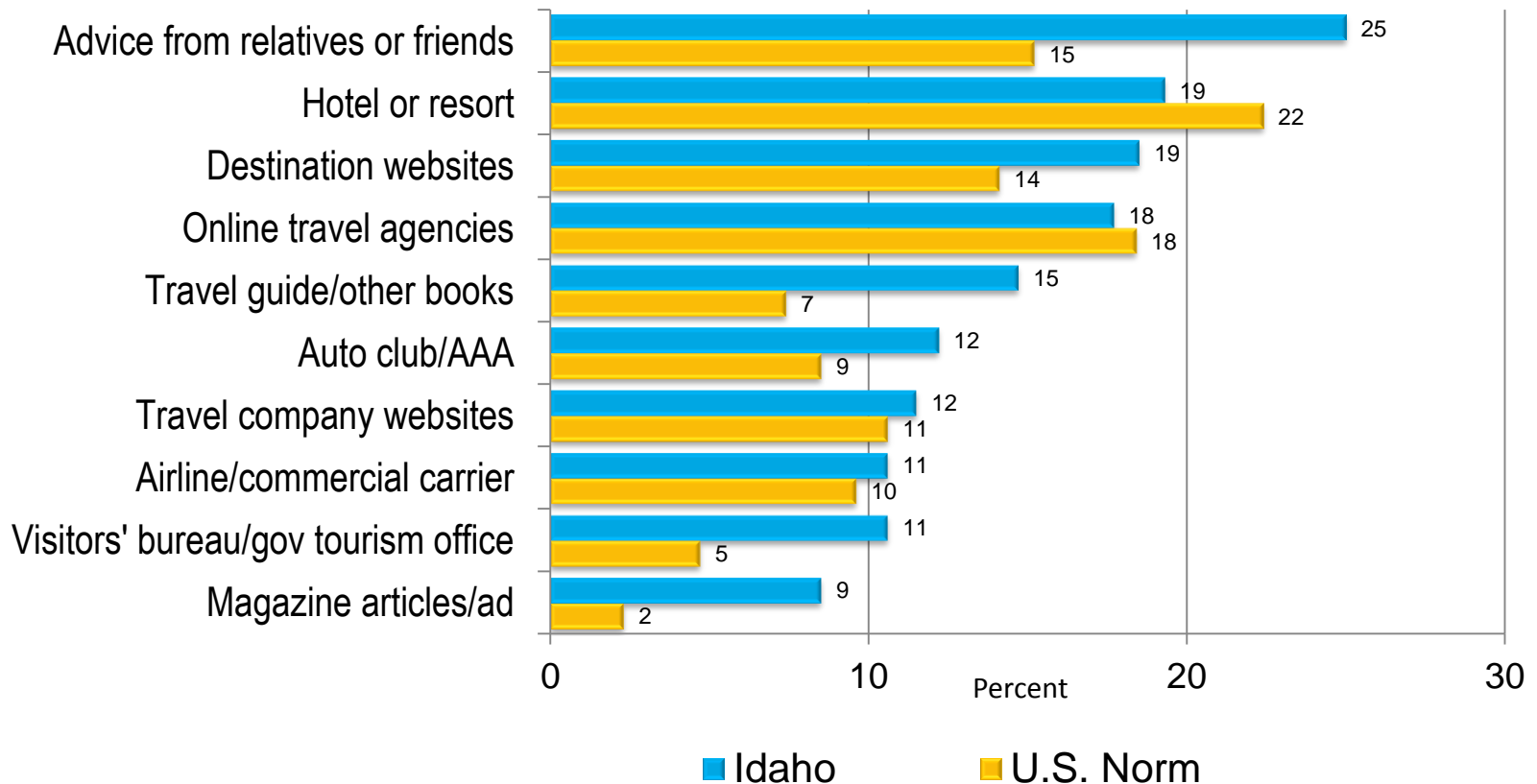
Base: Total Overnight Marketable Person-Trips



# Trip Planning Information Sources



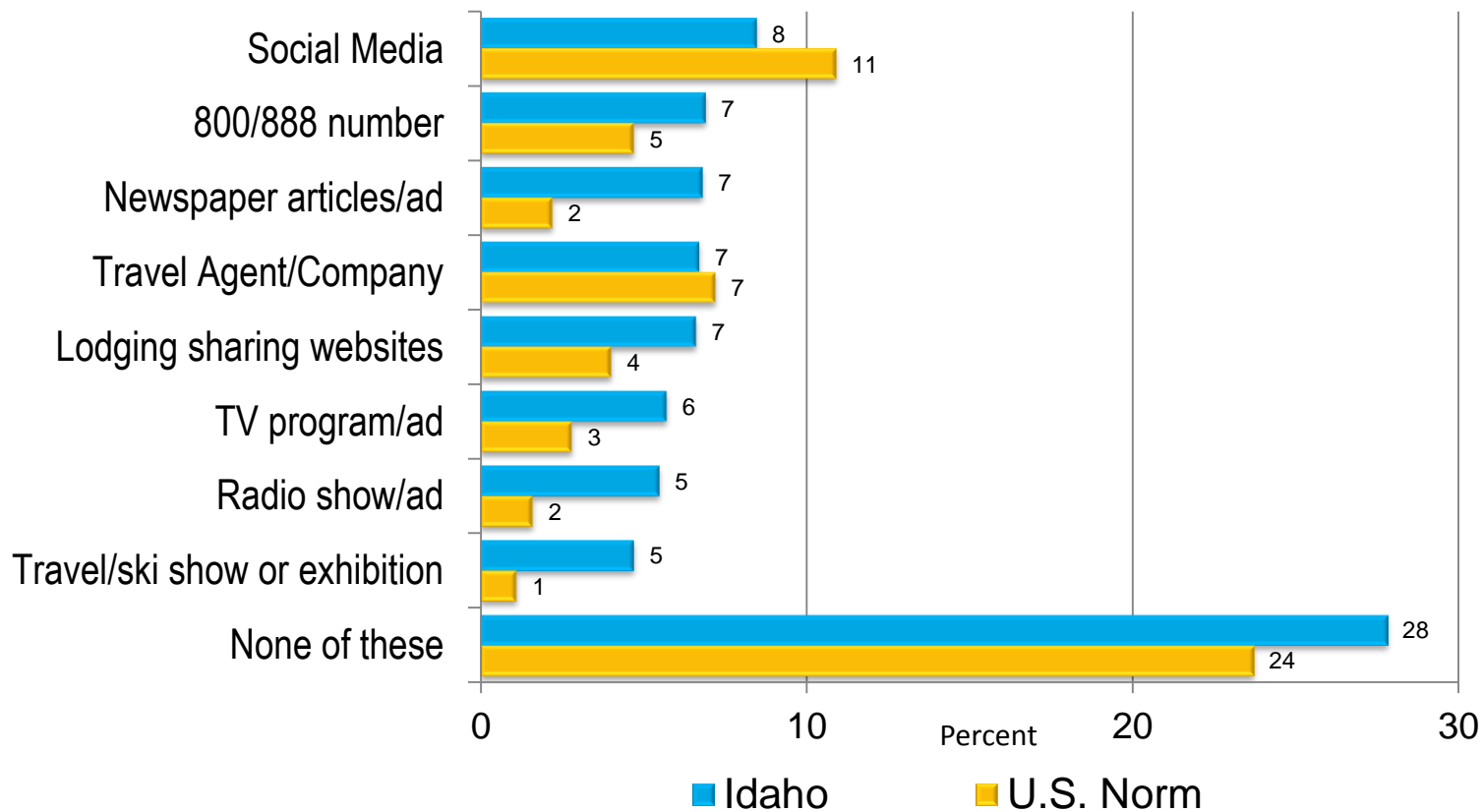
Base: Total Overnight Marketable Person-Trips



# Trip Planning Information Sources (Cont'd)



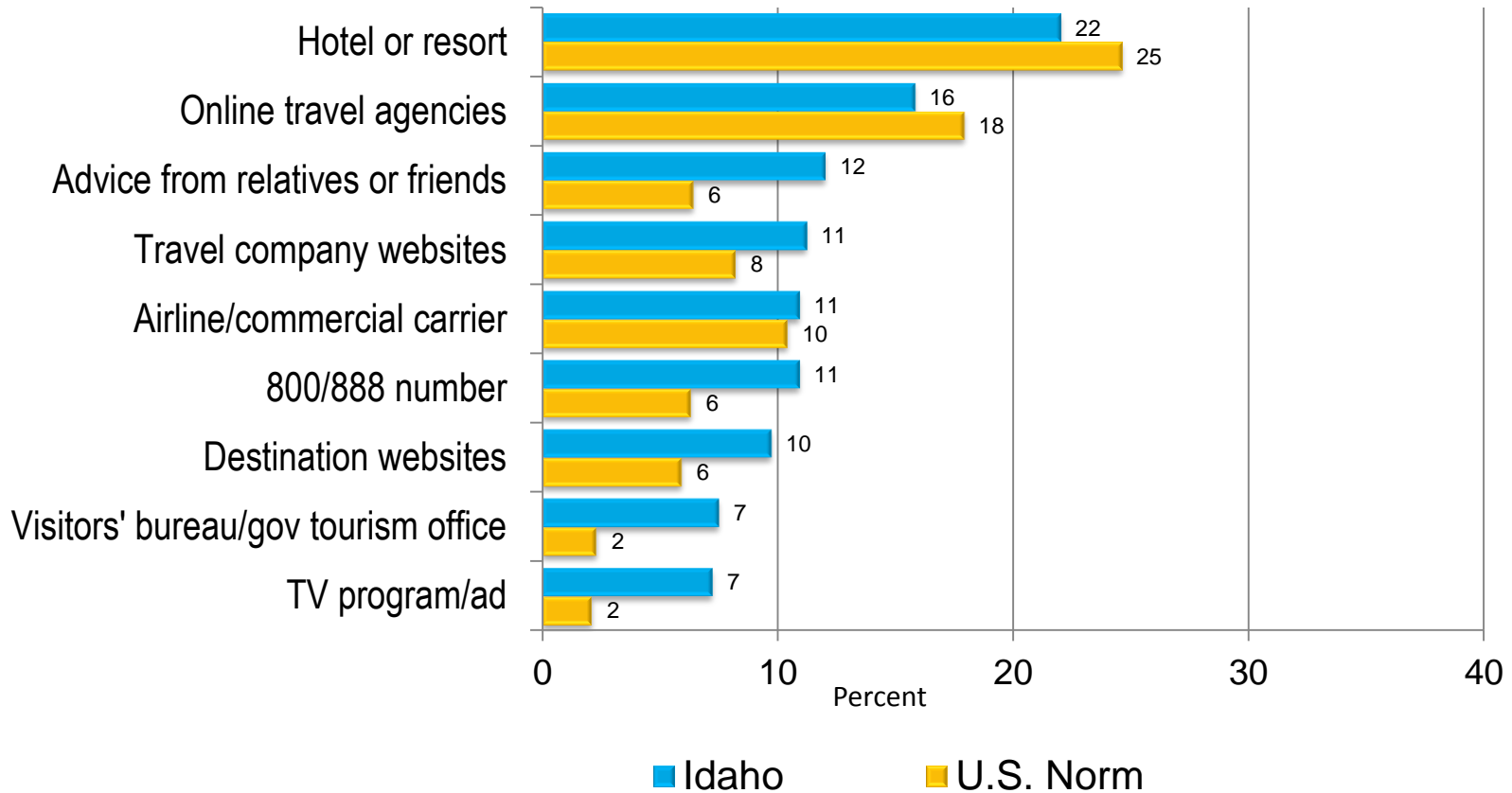
Base: Total Overnight Marketable Person-Trips



# Method of Booking



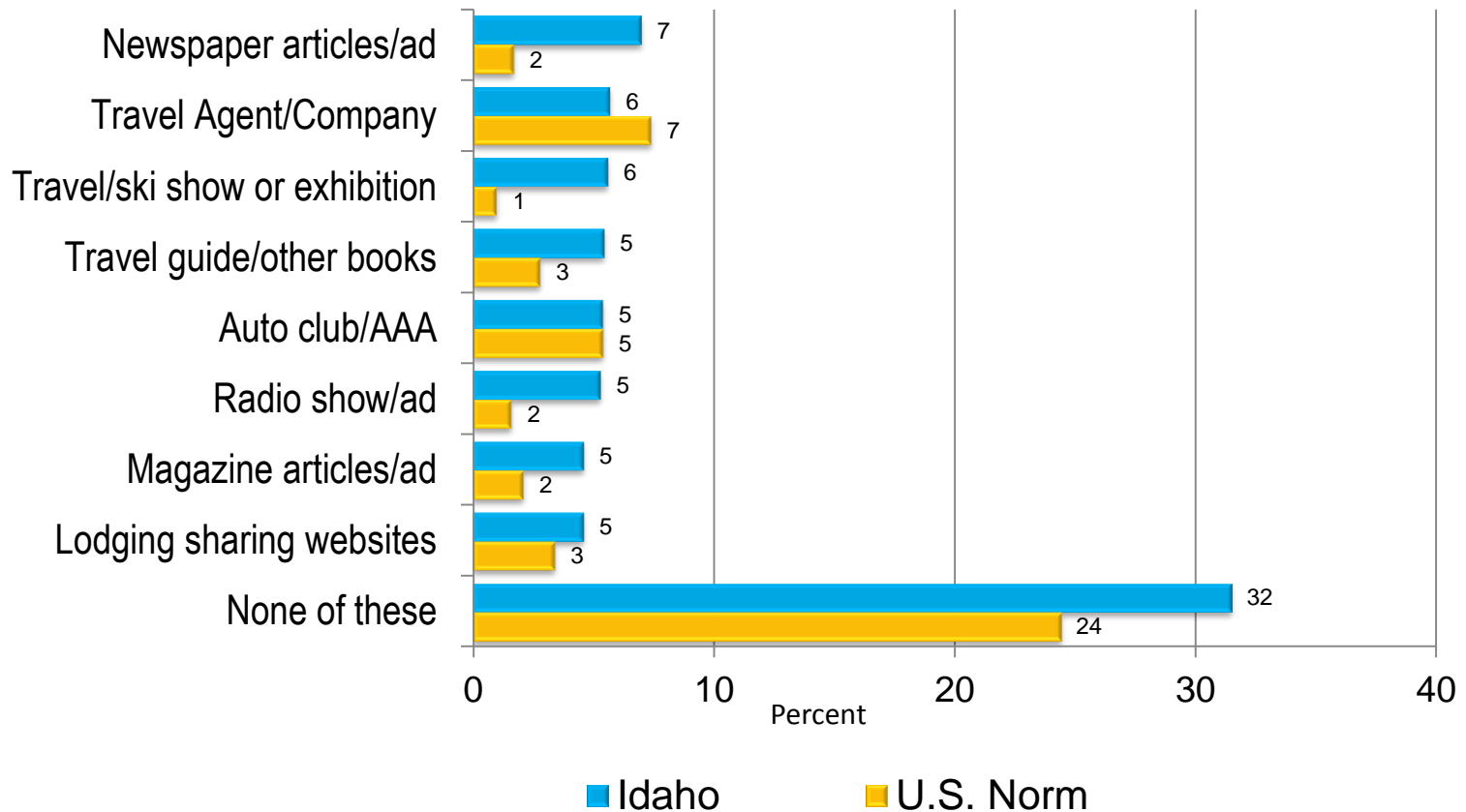
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# Method of Booking (Cont'd)



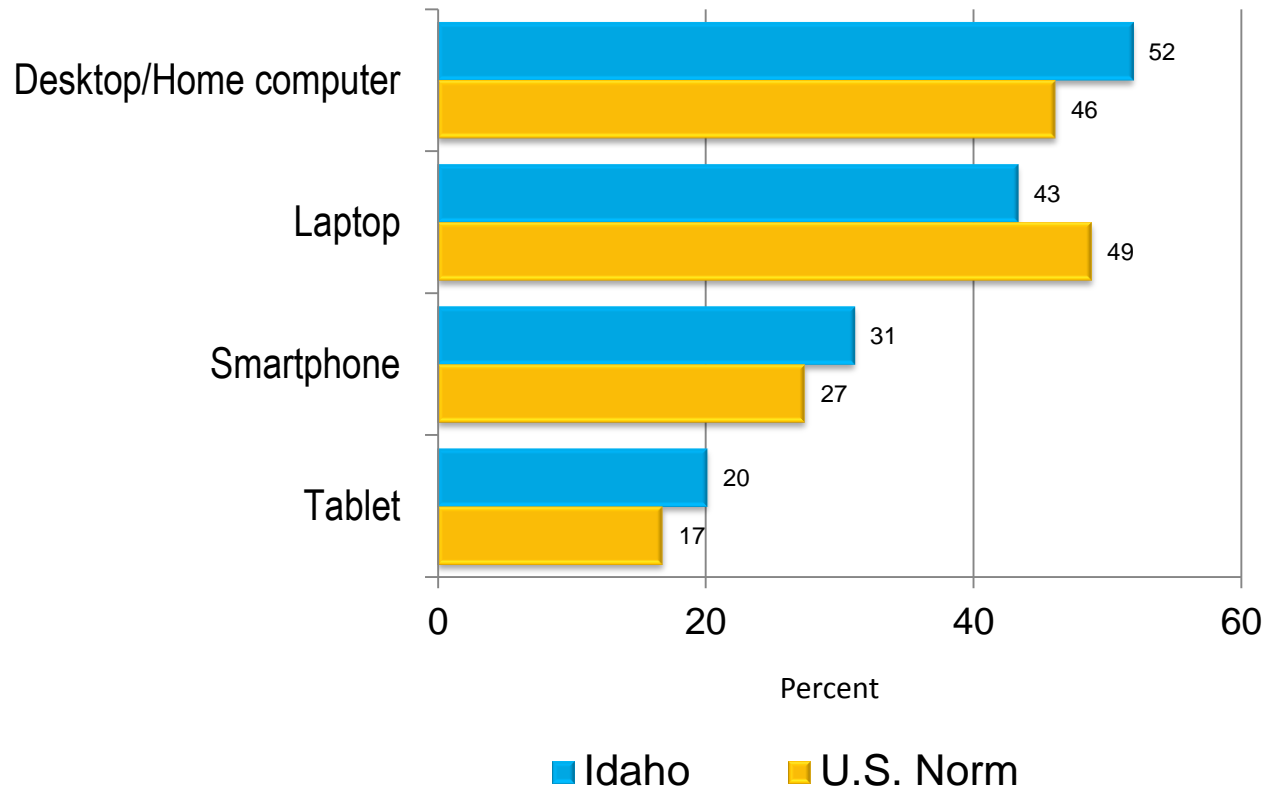
Base: Total Overnight Marketable Person-Trips



# Devices Used for Trip Planning



Base: Total Overnight Marketable Person-Trips

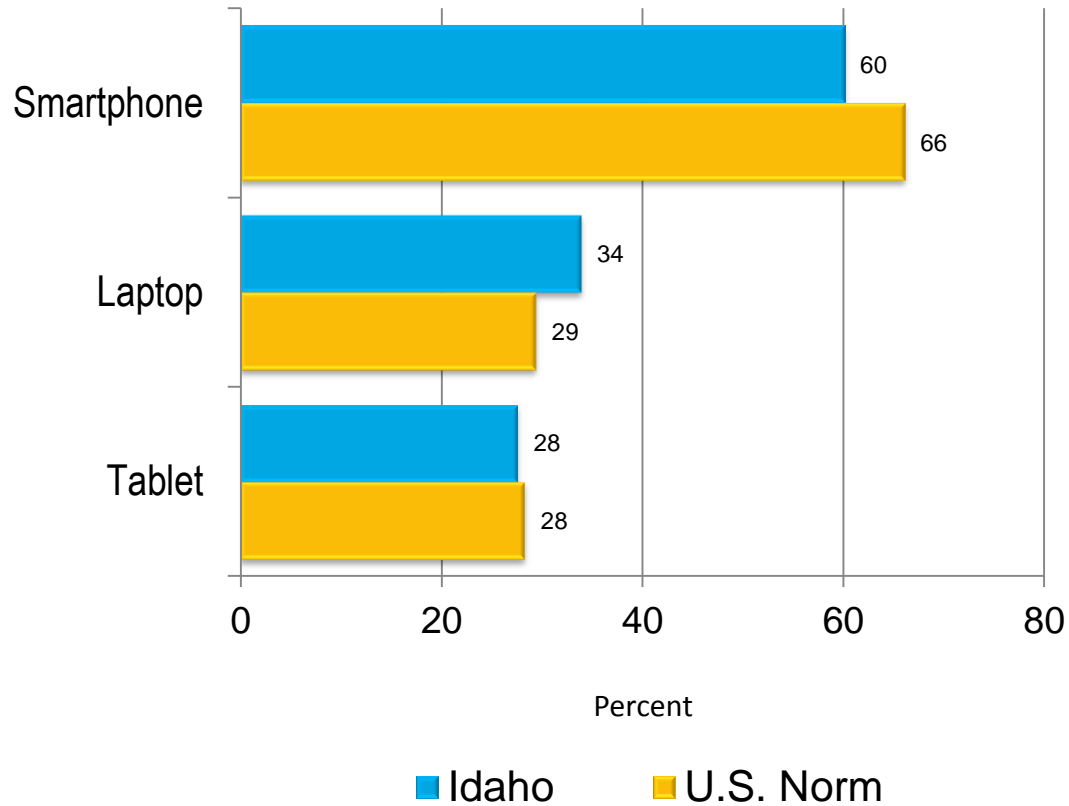




# Devices Used During Trip



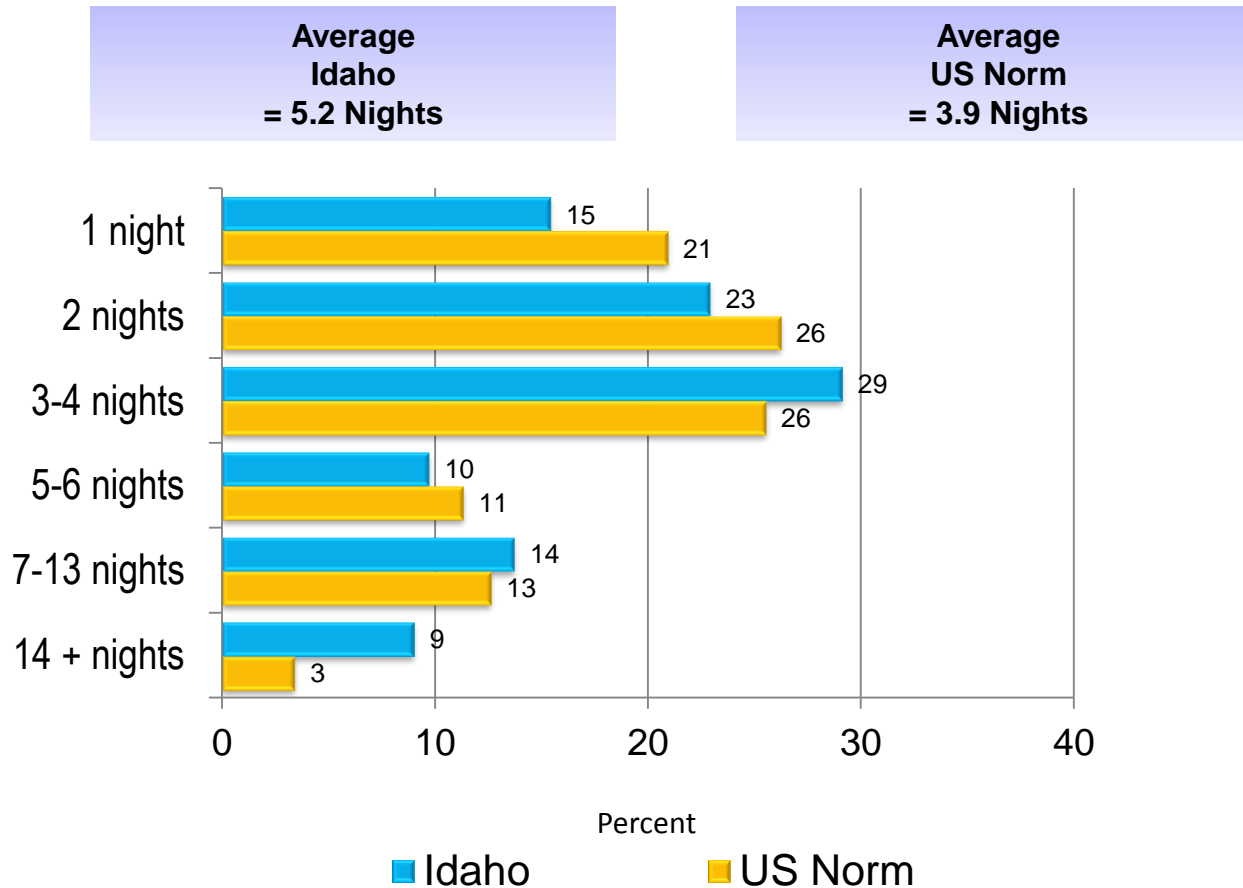
Base: Total Overnight Marketable Person-Trips



# Total Nights Away on Trip



Base: Total Overnight Marketable Person-Trips

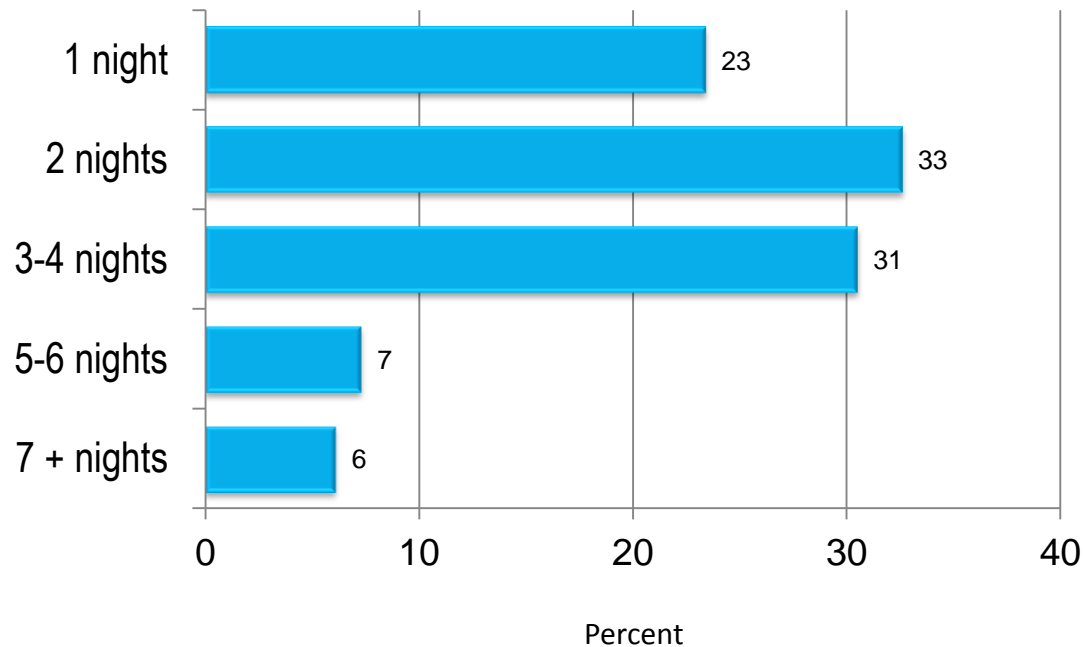


# Number of Nights Spent in Idaho



Base: Total Overnight Marketable Person-Trips

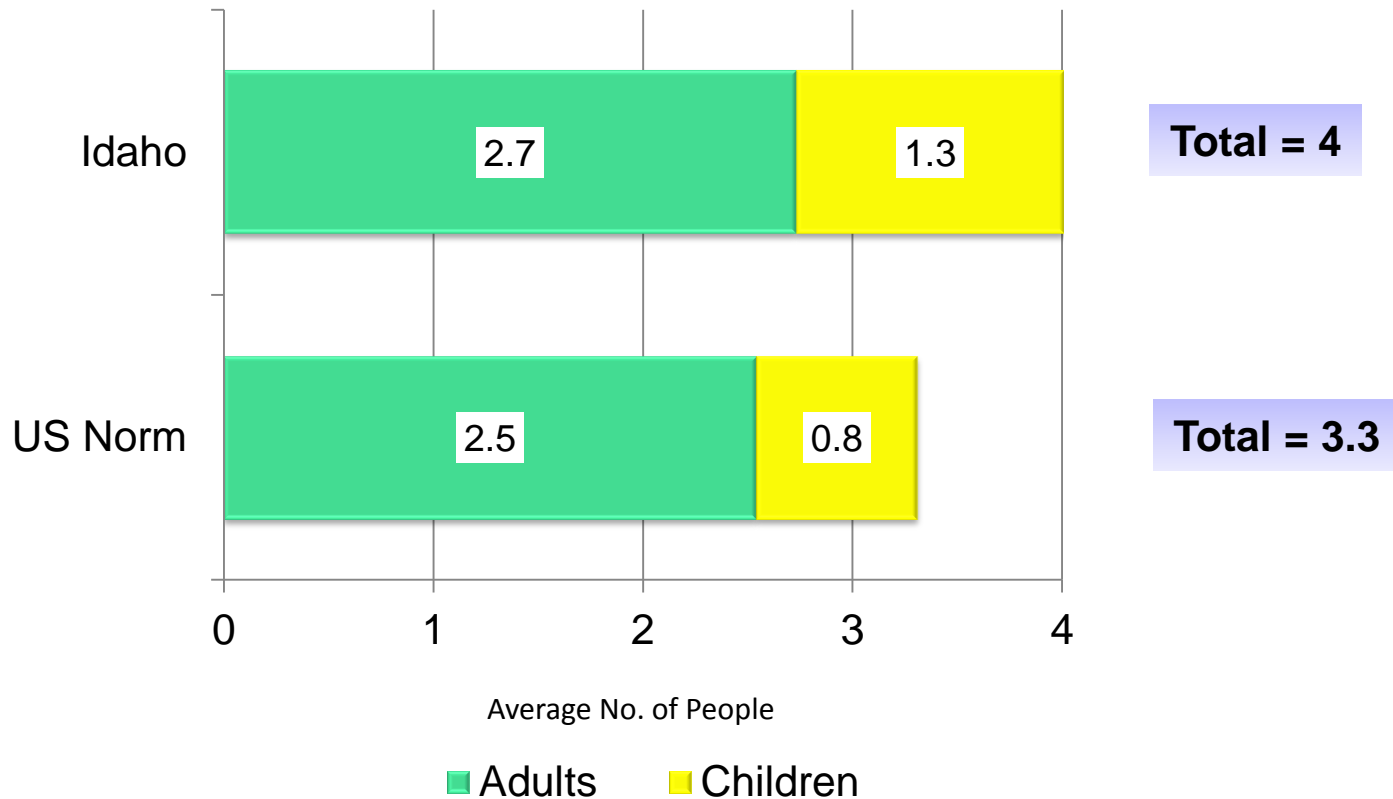
Average Nights Spent in Idaho = 3



# Size of Travel Party



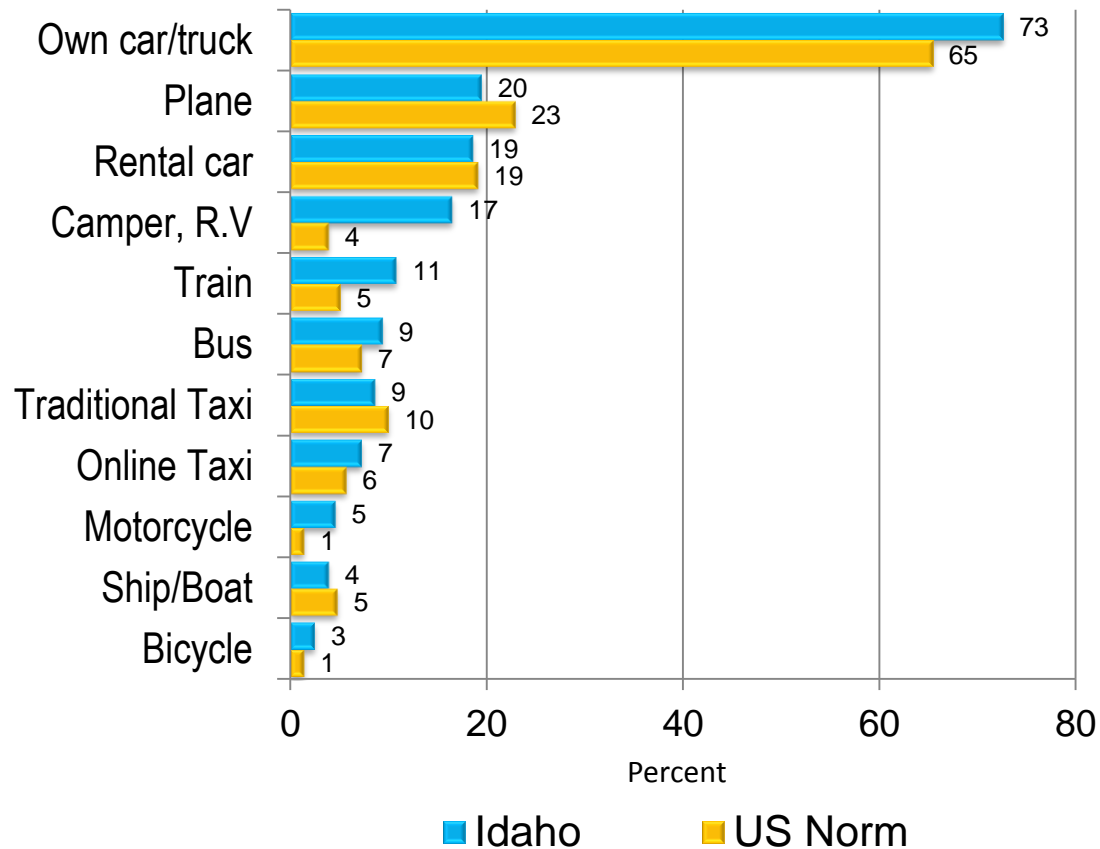
Base: Total Overnight Marketable Person-Trips



# Transportation



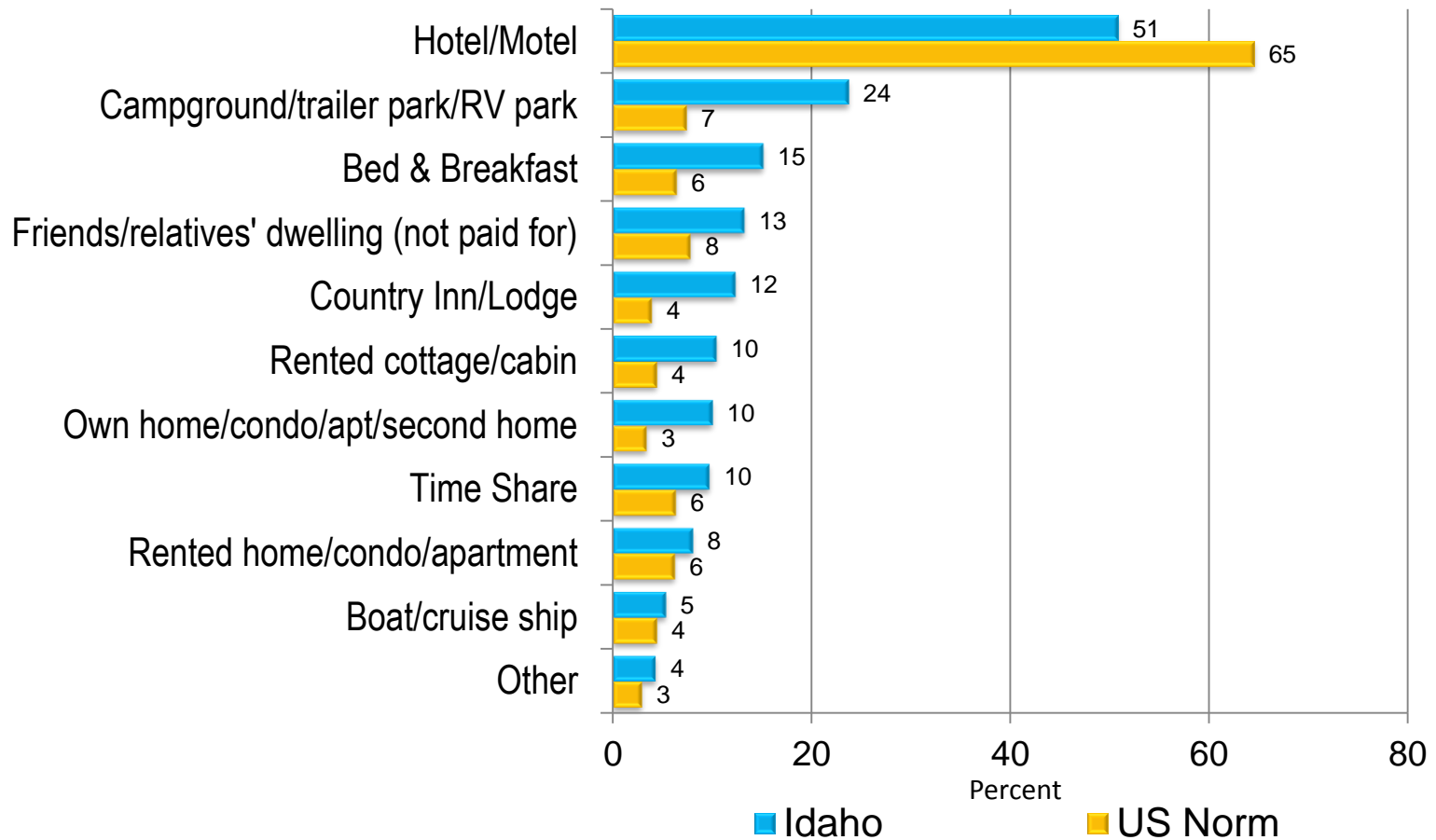
Base: Total Overnight Marketable Person-Trips



# Accommodation



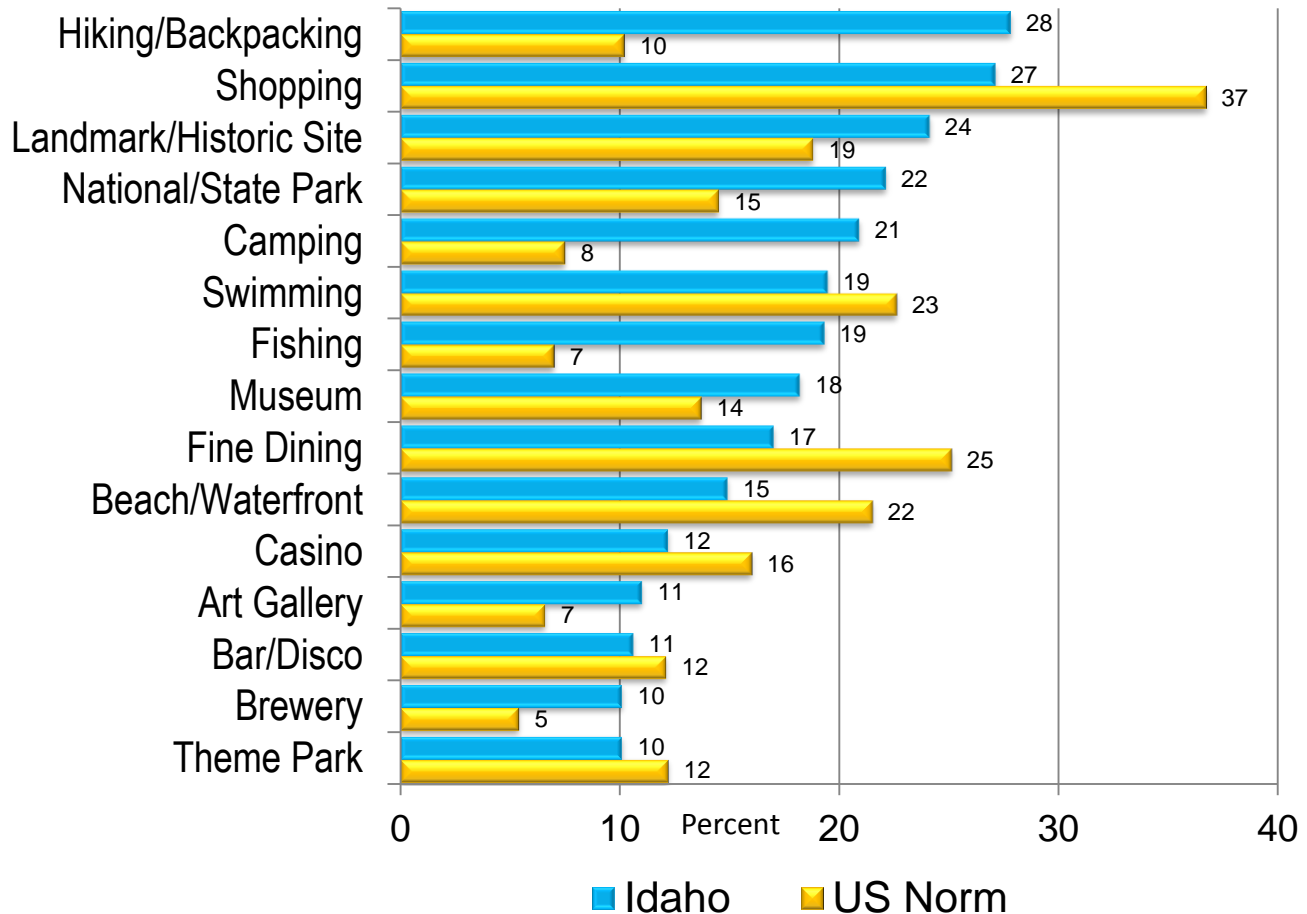
Base: Total Overnight Marketable Person-Trips



# Activities and Experiences



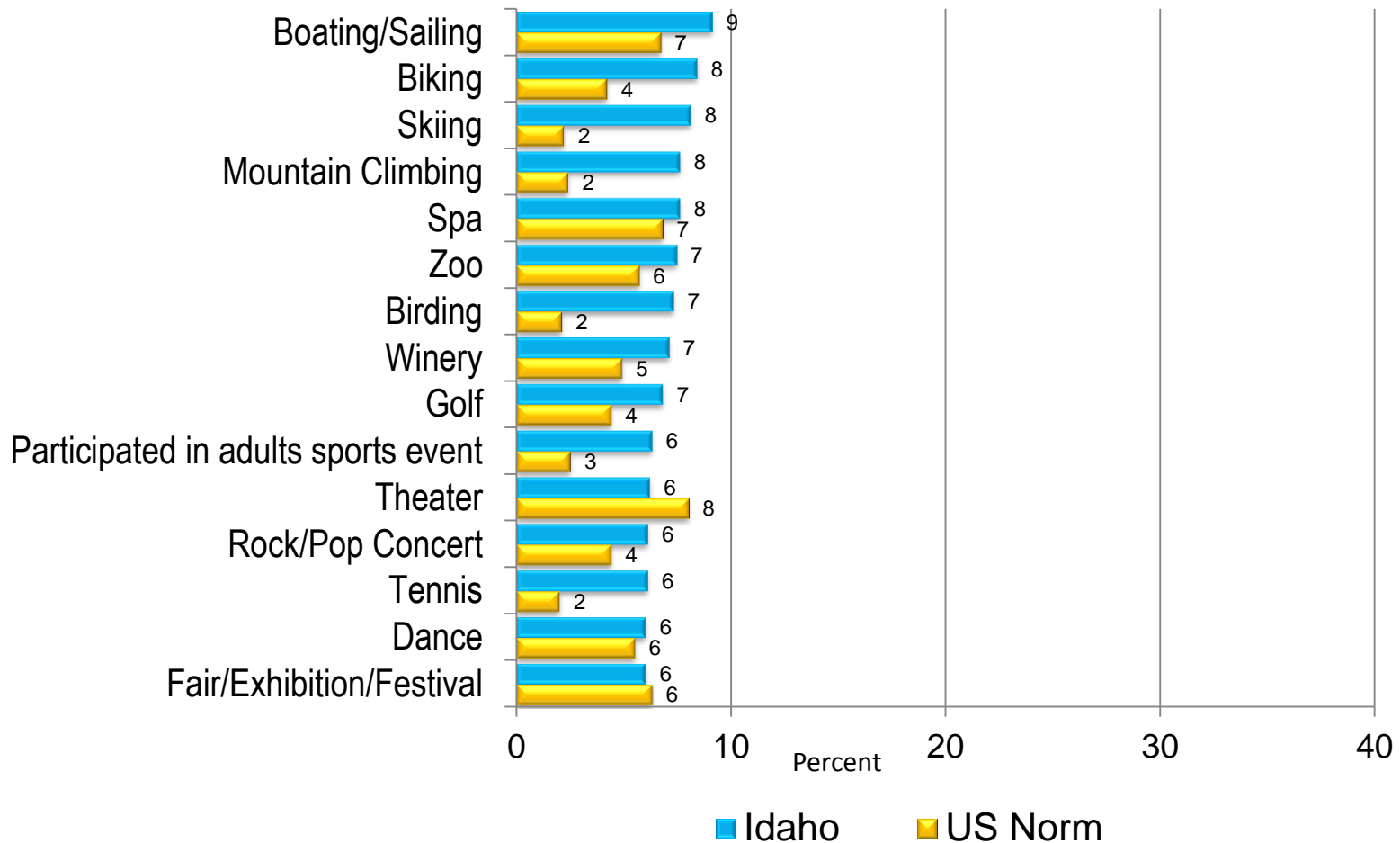
Base: Total Overnight Marketable Person-Trips



# Activities and Experiences (Cont'd)



Base: Total Overnight Marketable Person-Trips

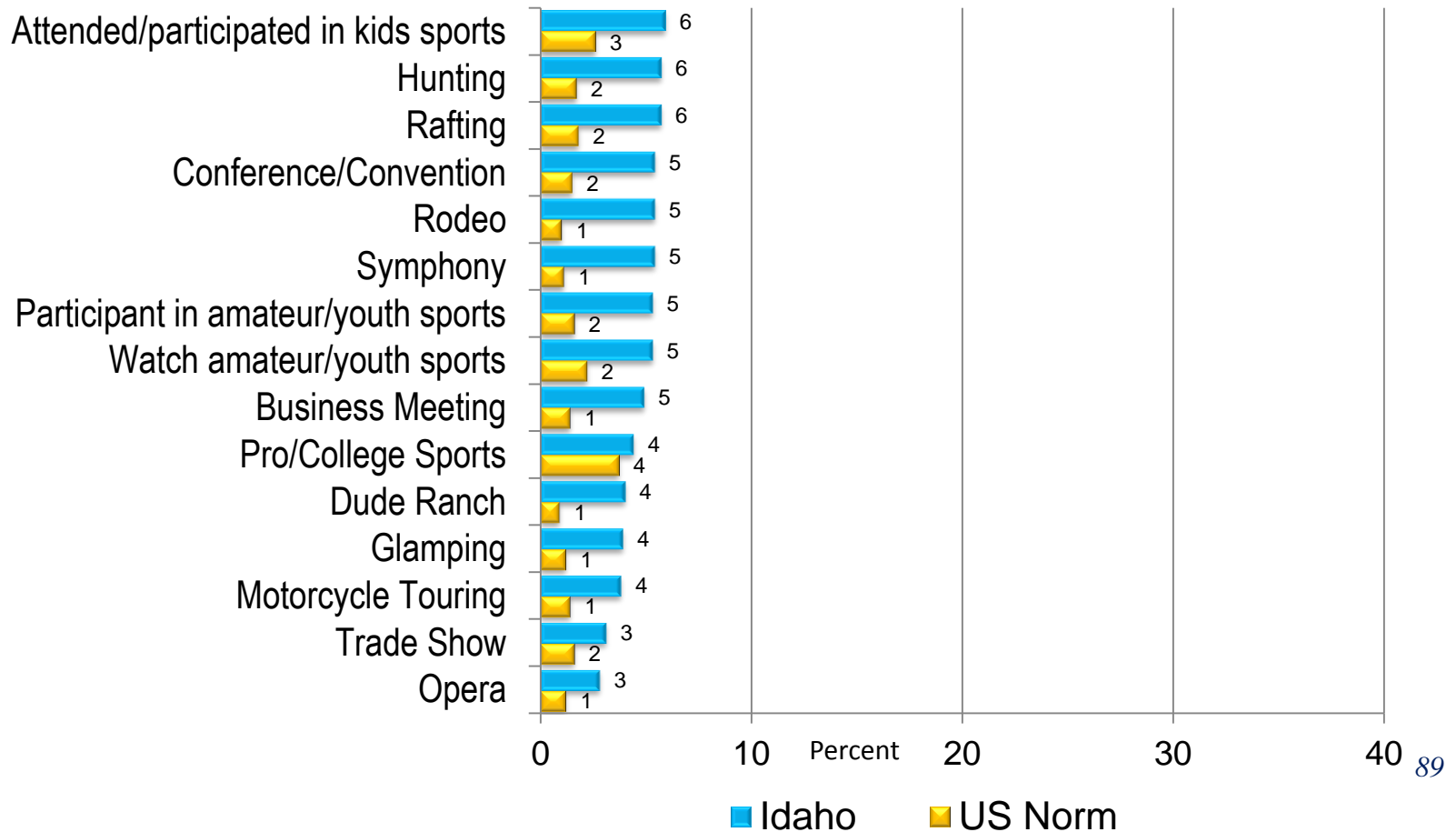




# Activities and Experiences (Cont'd)



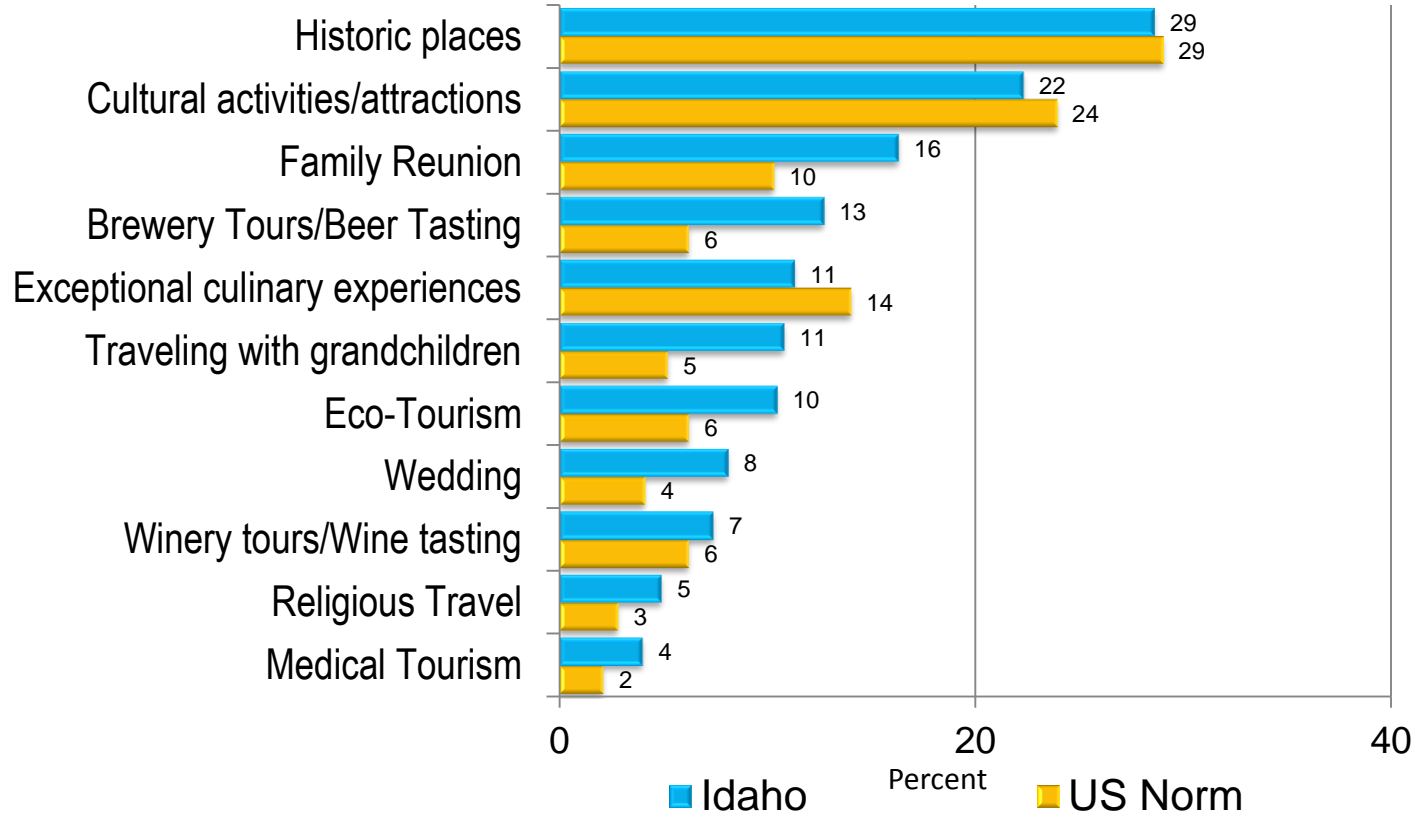
Base: Total Overnight Marketable Person-Trips



# Activities of Special Interest



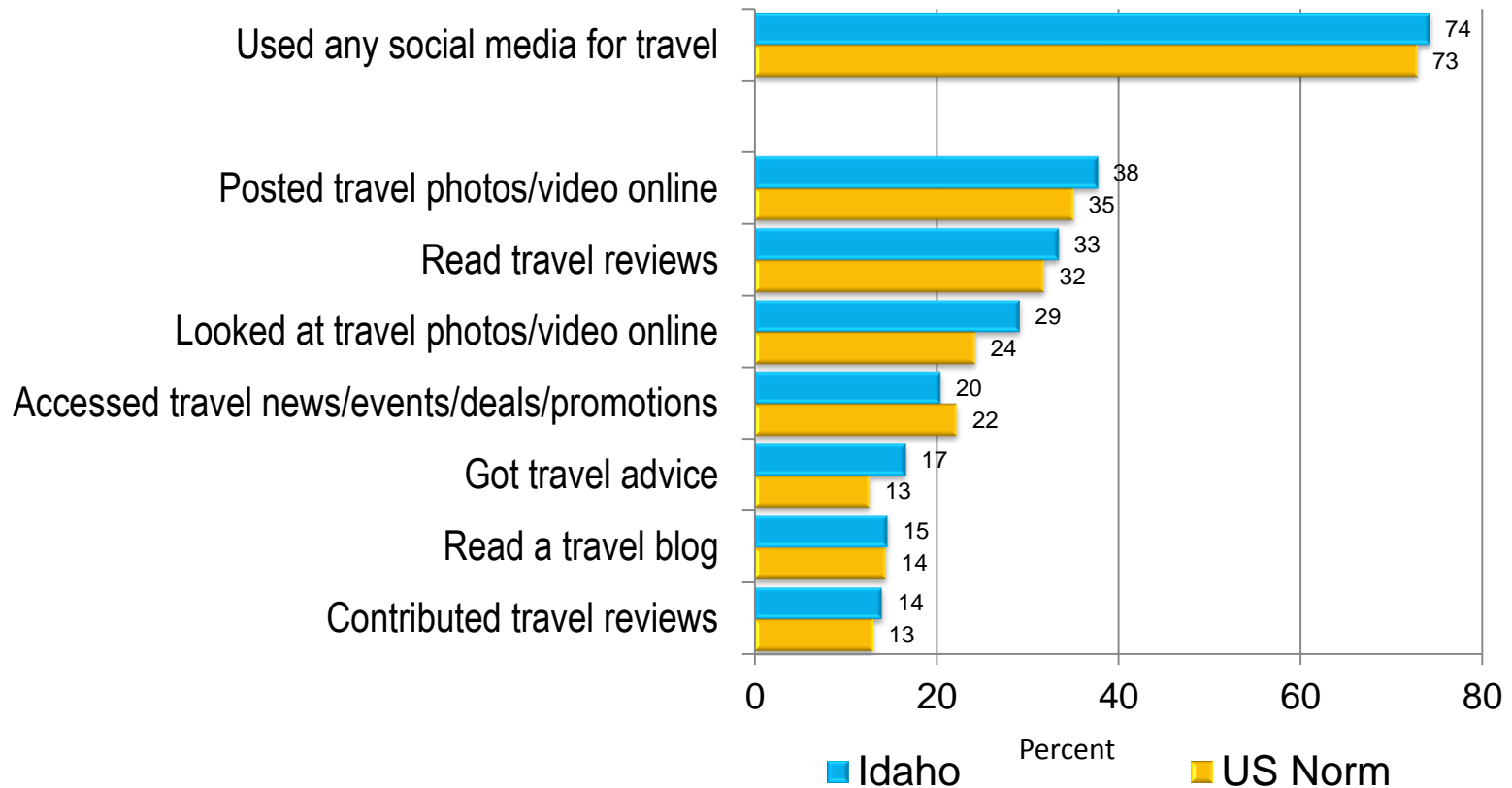
Base: Total Overnight Marketable Person-Trips



# Online Social Media Use by Travelers



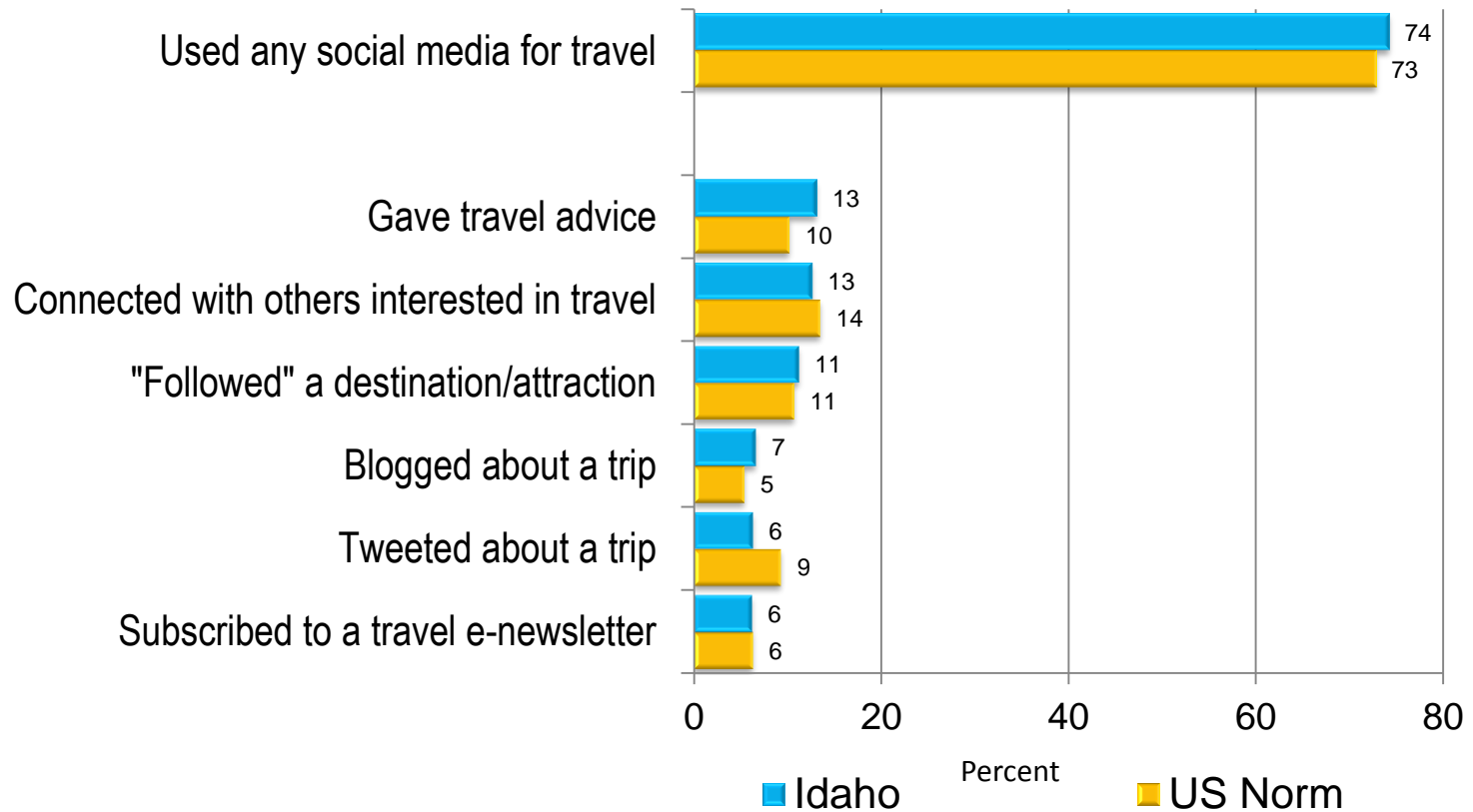
Base: Total Overnight Marketable Person-Trips



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



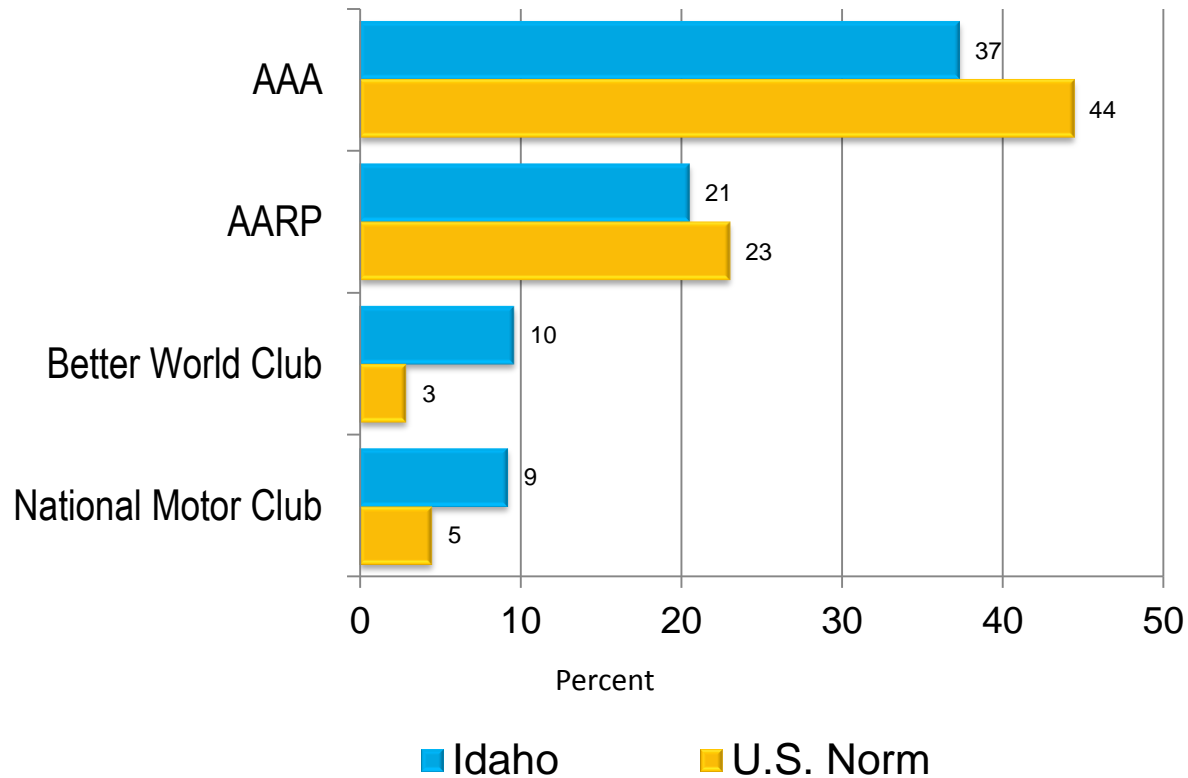
Base: Total Overnight Marketable Person-Trips



# Organization Membership



Base: Total Overnight Marketable Person-Trips



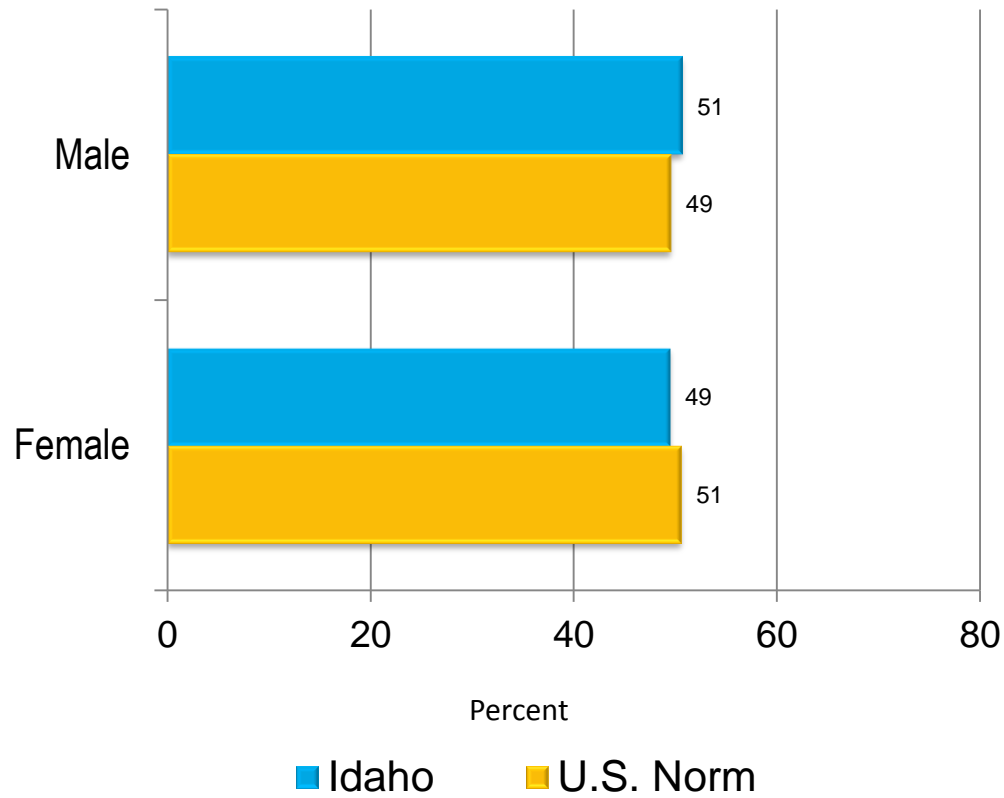


# Demographic Profile of Overnight Leisure Marketable Visitors

# Gender



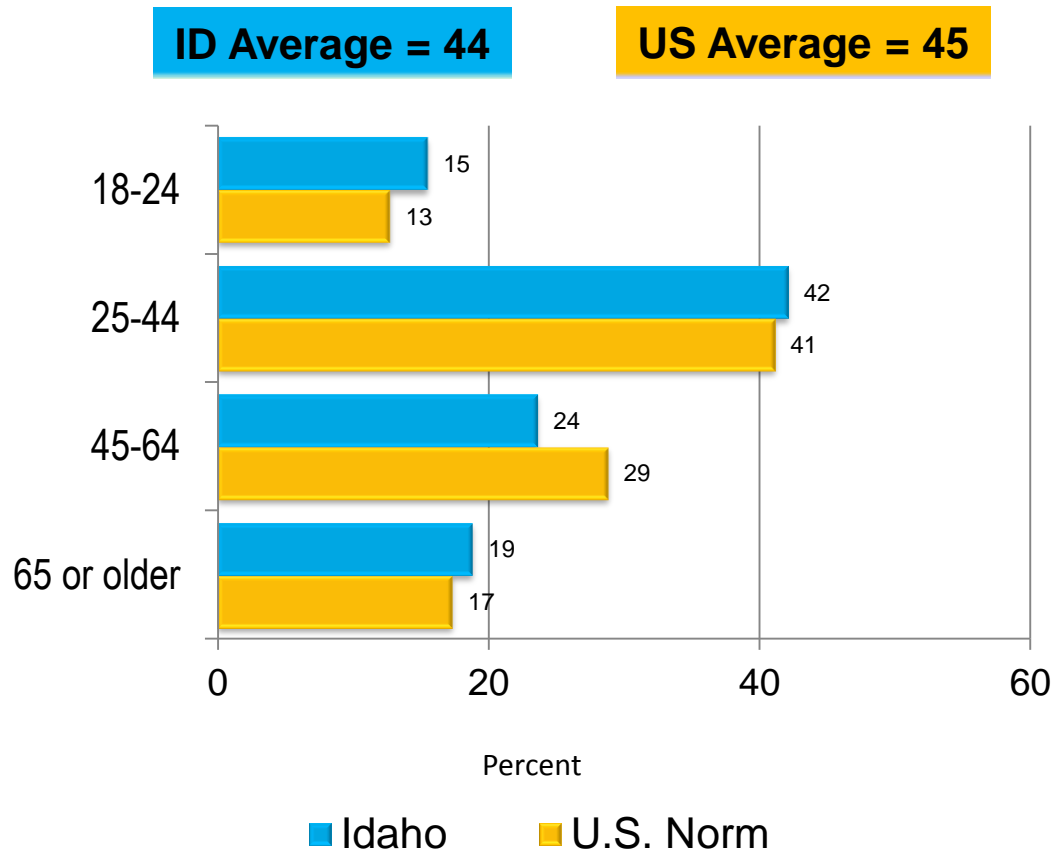
Base: Total Overnight Marketable Person-Trips



# Age



Base: Total Overnight Marketable Person-Trips

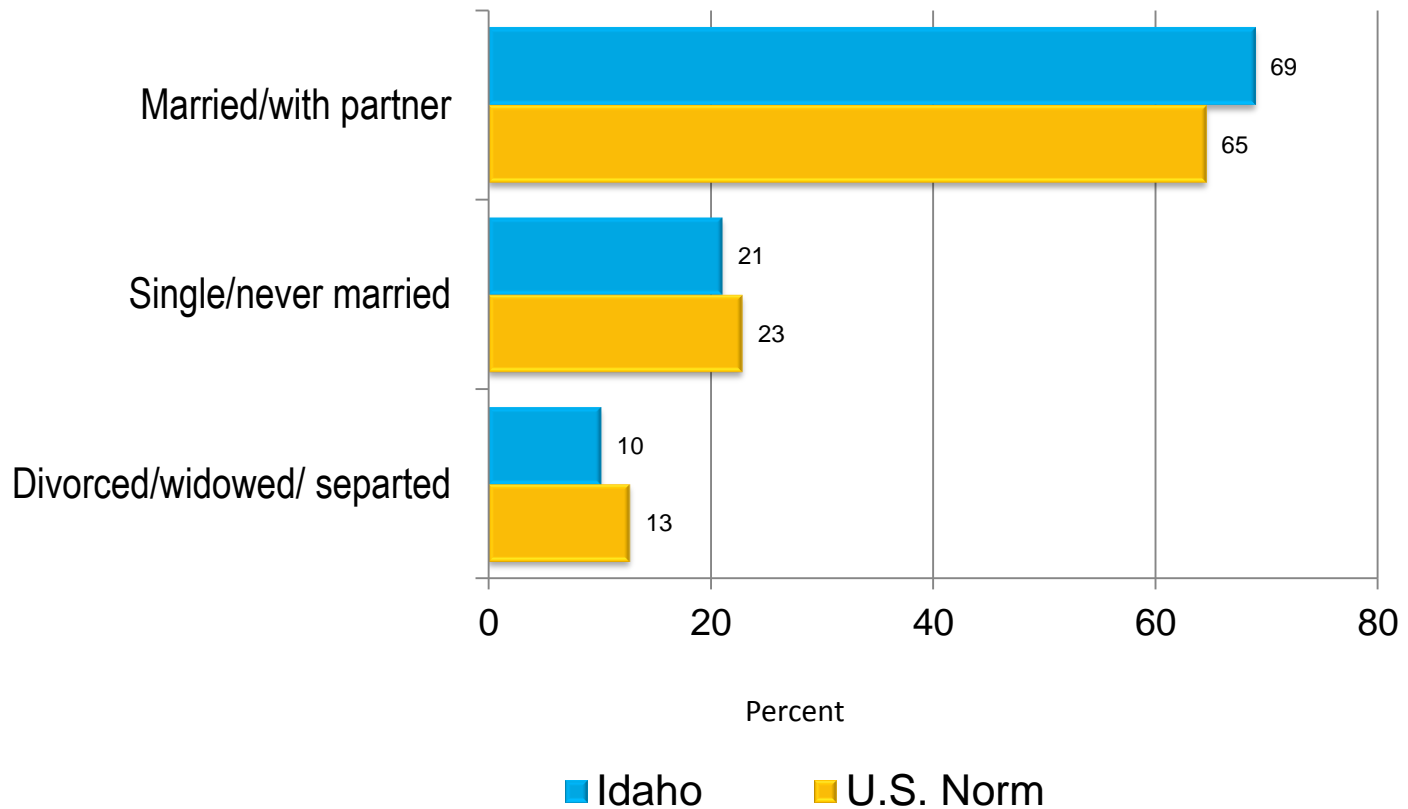




# Marital Status



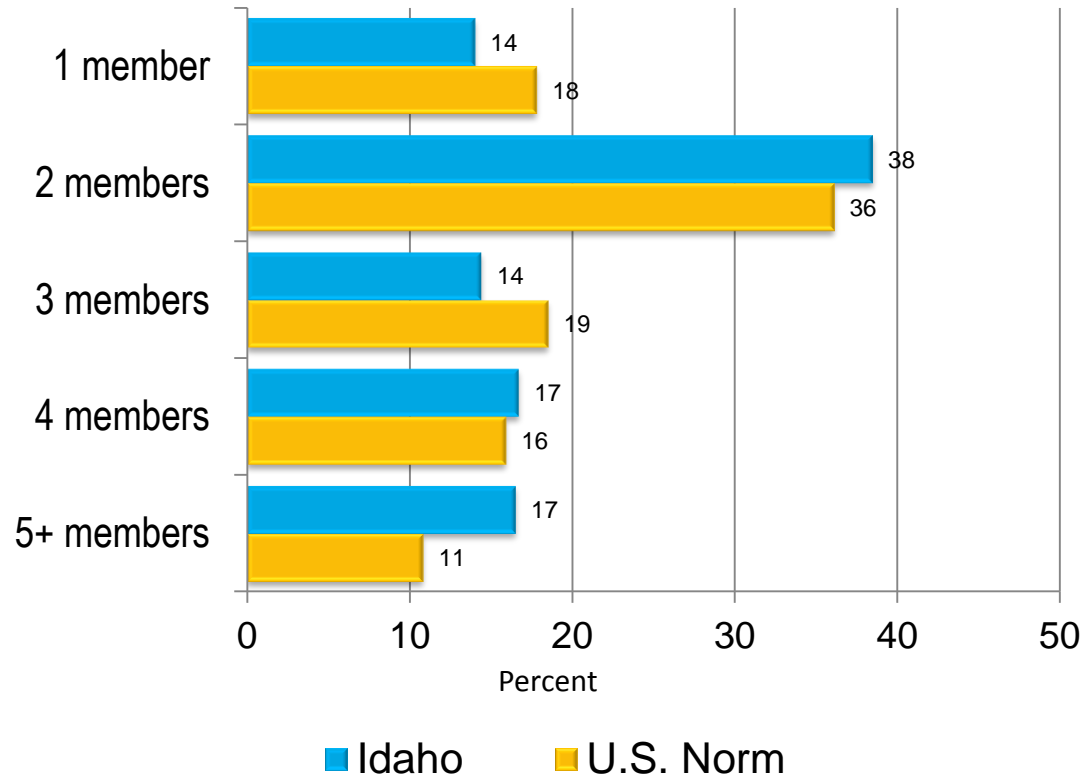
Base: Total Overnight Marketable Person-Trips



# Household Size



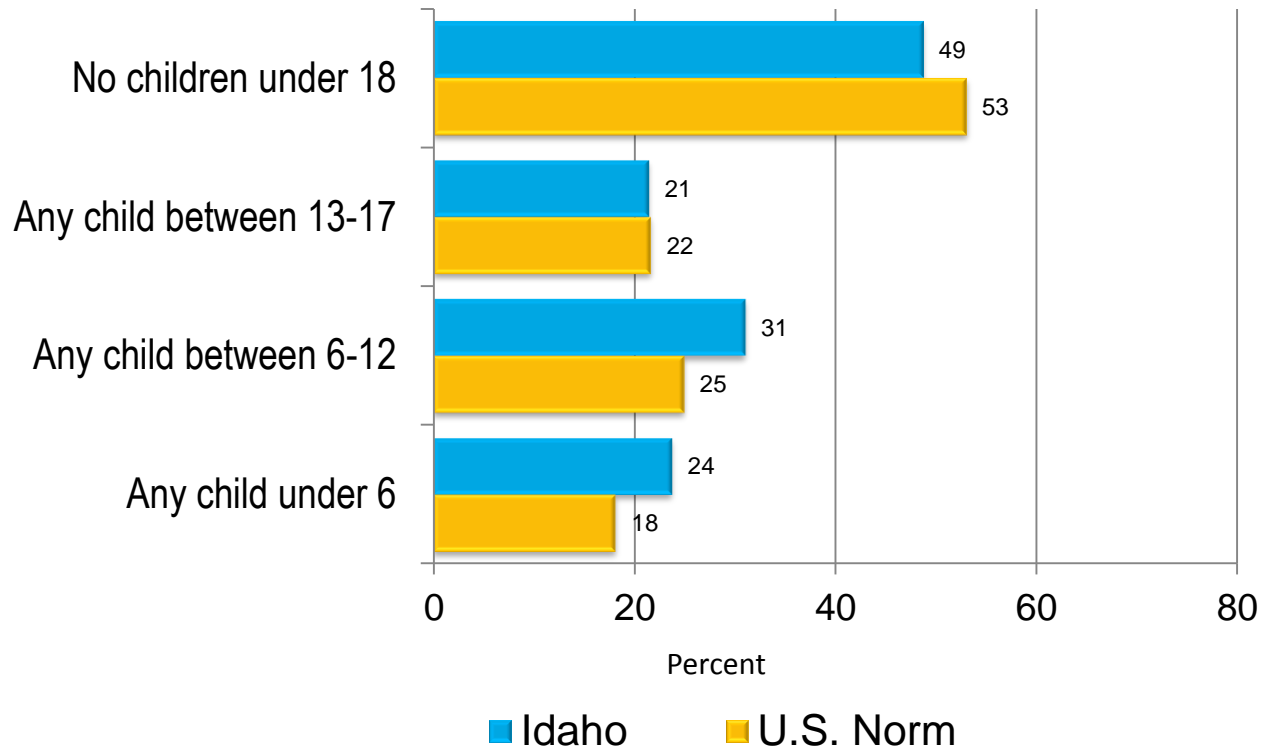
Base: Total Overnight Marketable Person-Trips



# Children in Household



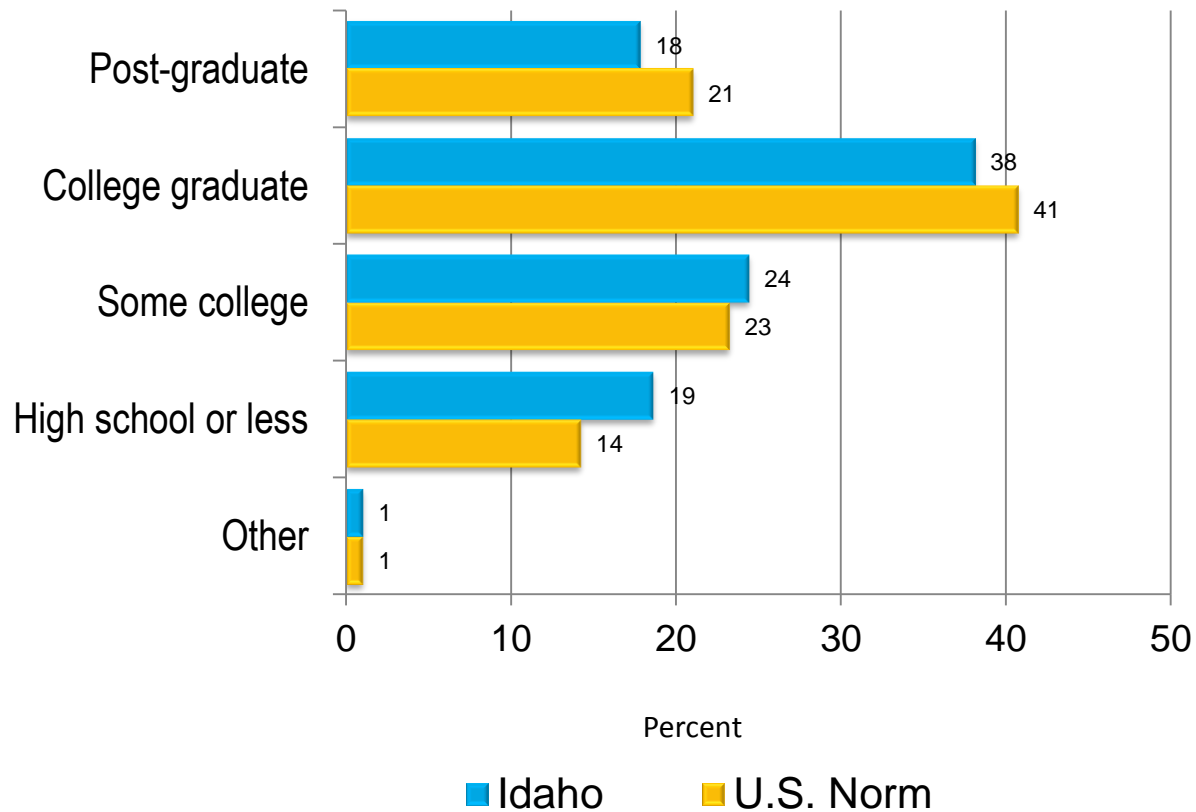
Base: Total Overnight Marketable Person-Trips



# Education



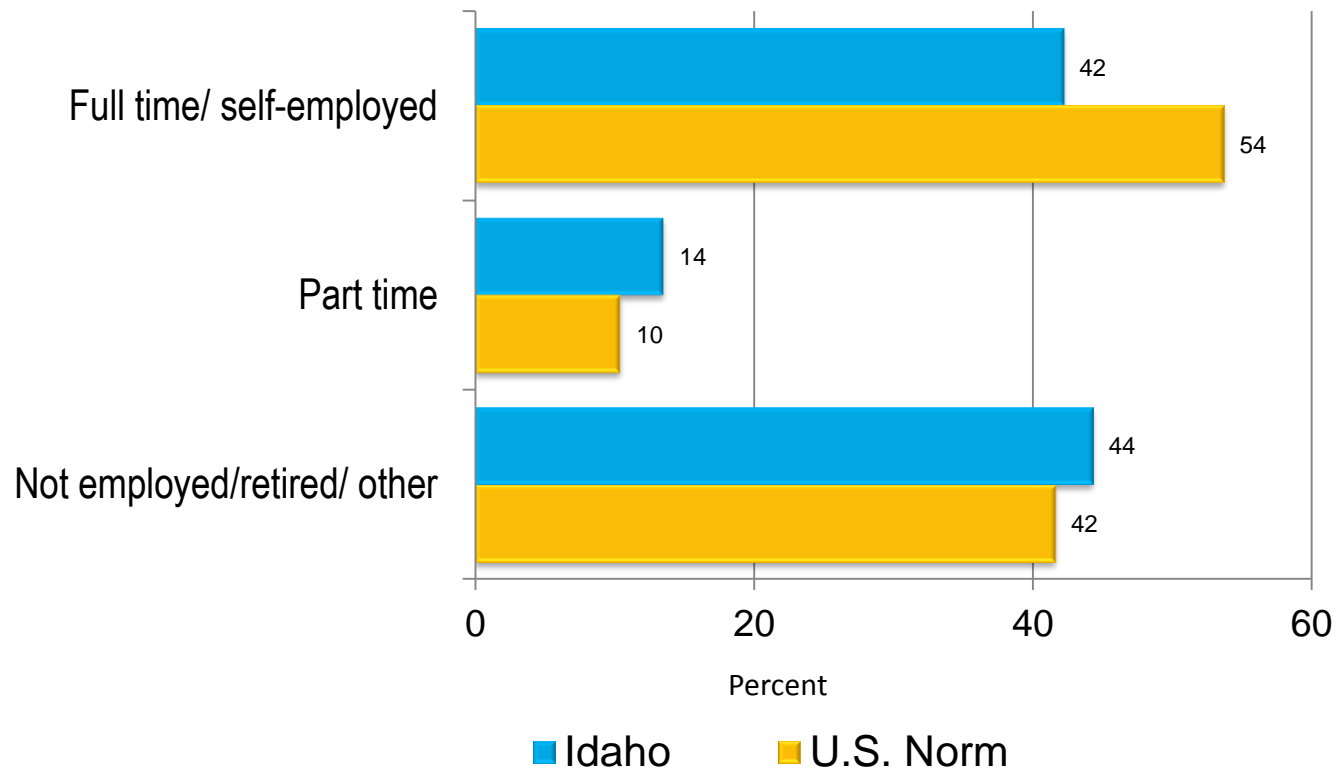
Base: Total Overnight Marketable Person-Trips



# Employment



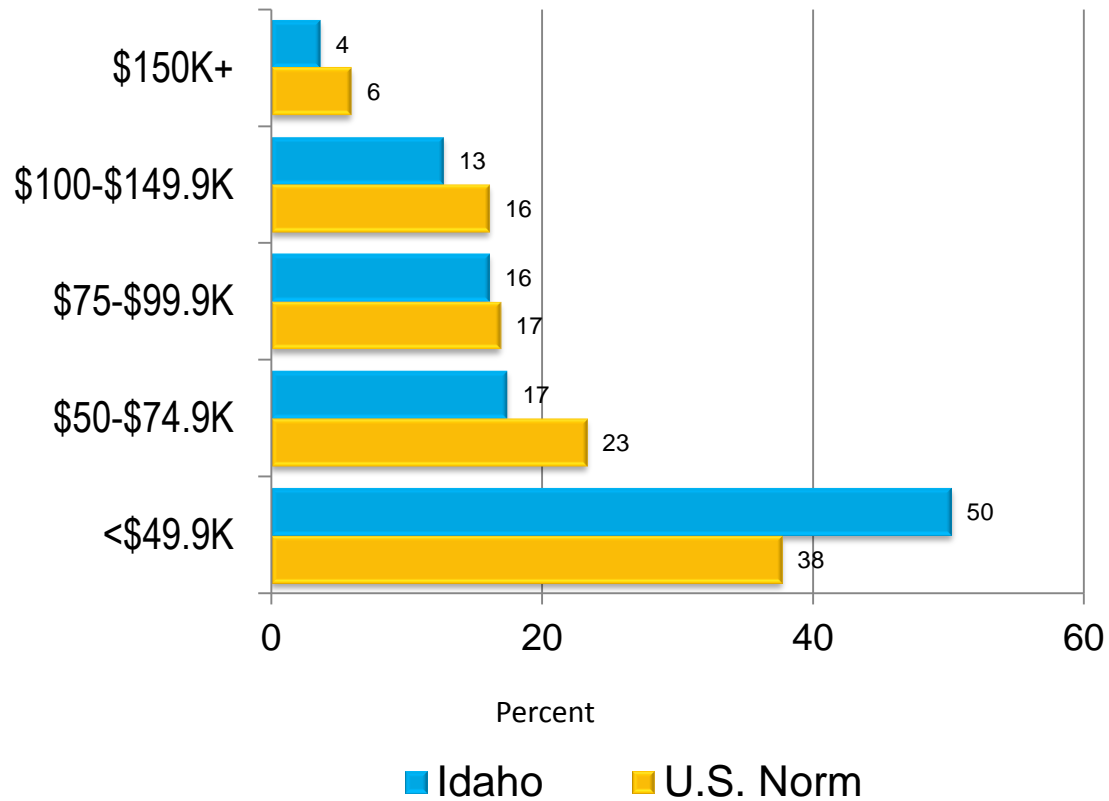
Base: Total Overnight Marketable Person-Trips



# Household Income



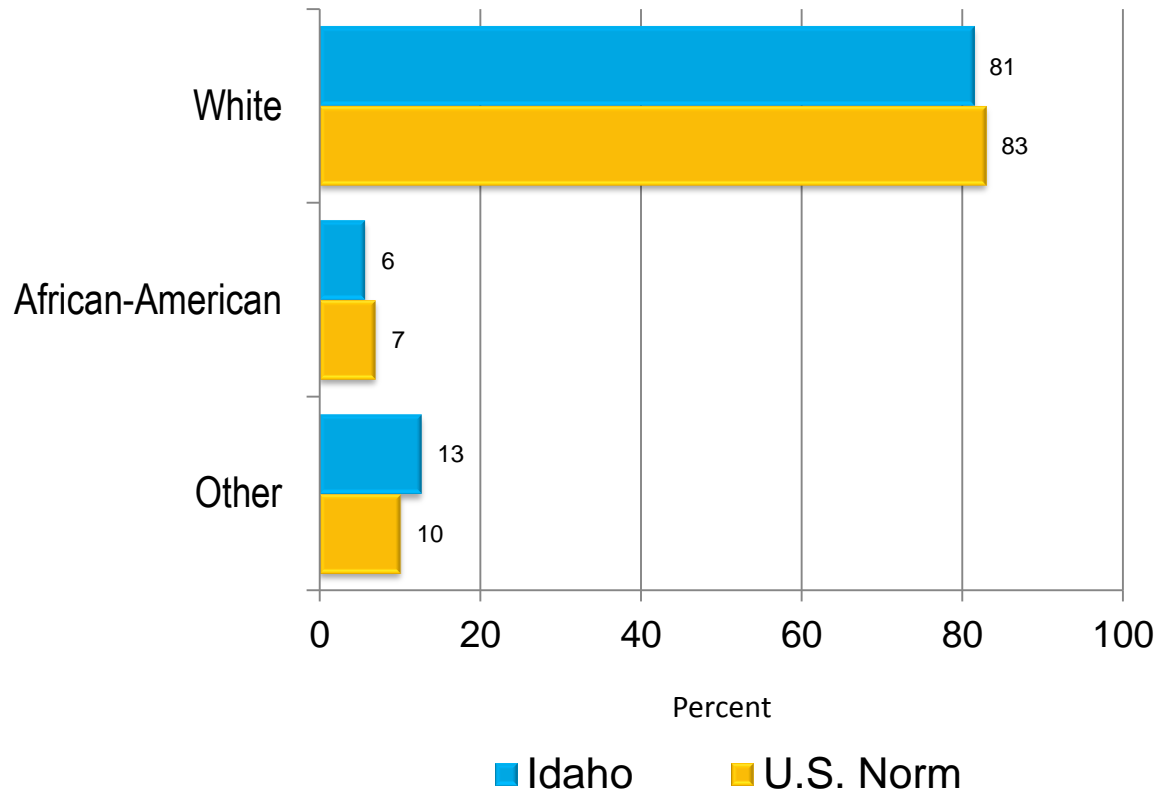
Base: Total Overnight Marketable Person-Trips



# Race



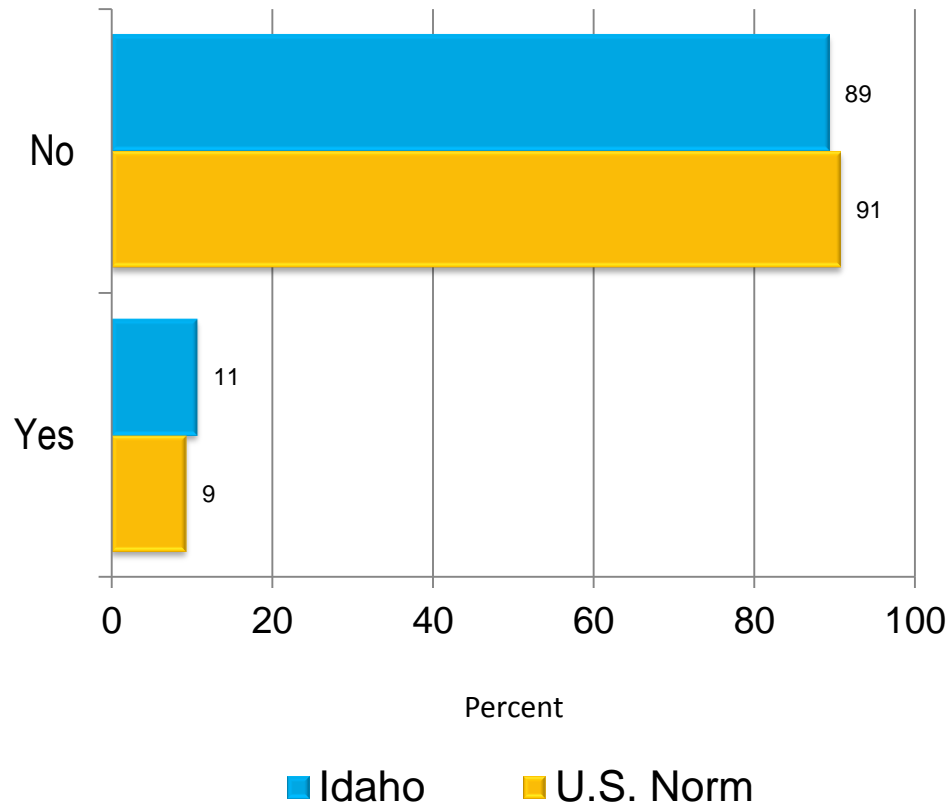
Base: Total Overnight Marketable Person-Trips



# Hispanic Background



Base: Total Overnight Marketable Person-Trips







# Day Trip Detail



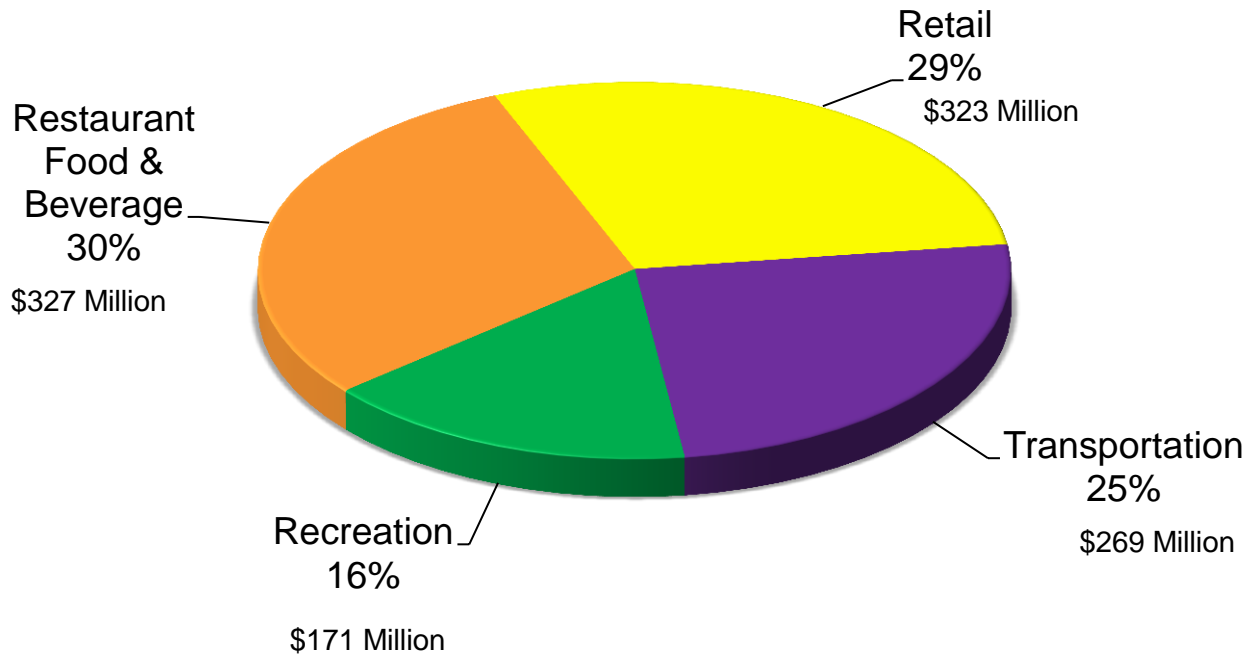
# Day Trip Expenditures

# Total Day Trip Spending – by Sector



**Total Spending = \$1.1 Billion**

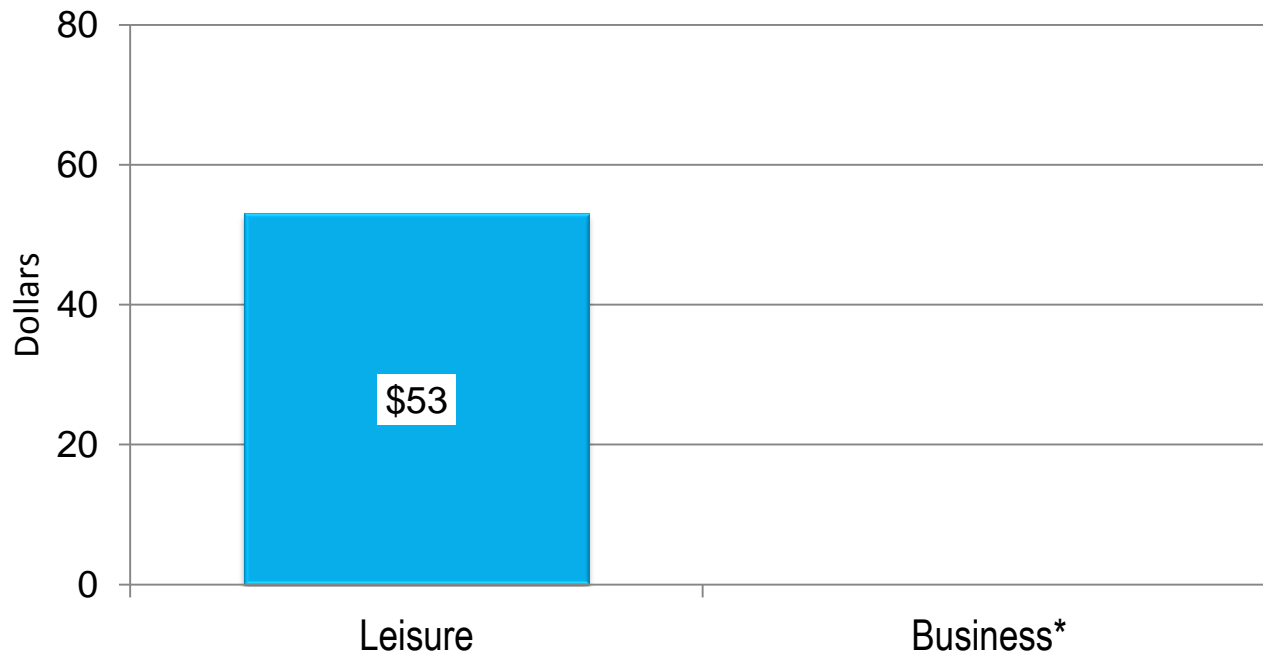
**+8.7% vs. 2013**



# Average Per Person Expenditures on Day Trips — By Sector

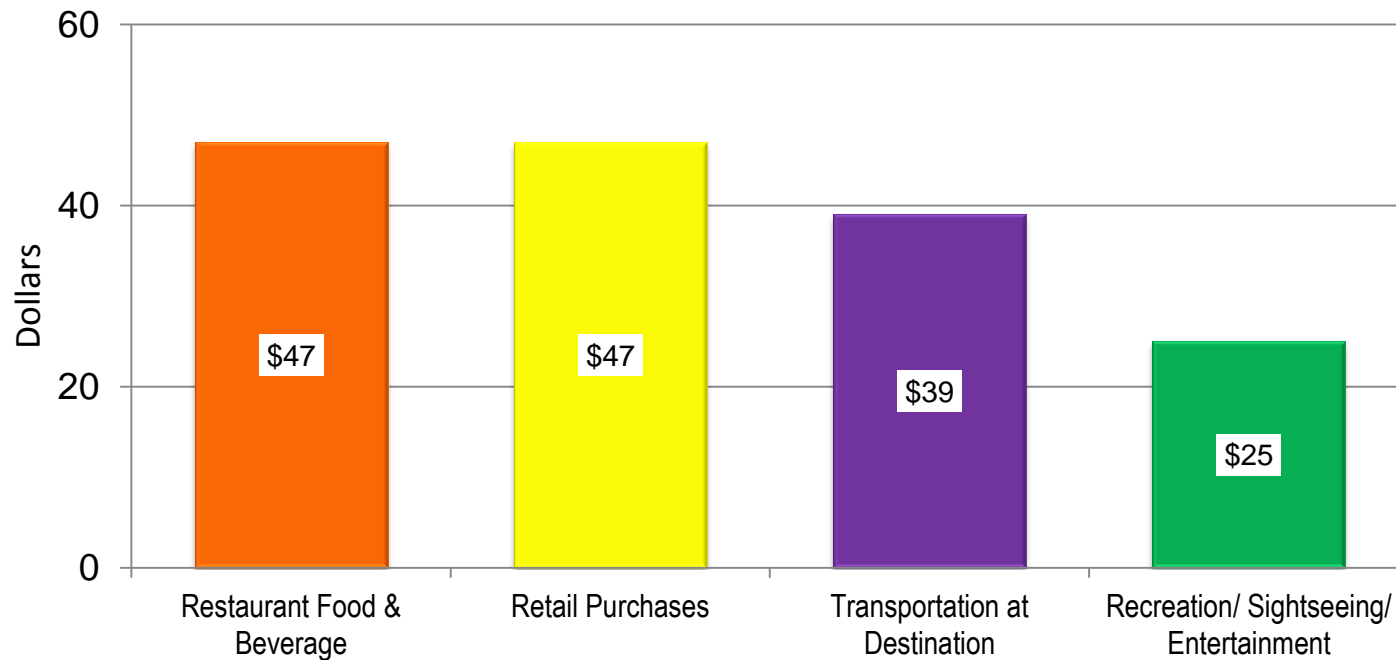


# Average Per Person Expenditures on Day Trip – by Trip Purpose



\* Low Business Base

# Average Per Party Expenditures on Day Trips — By Sector



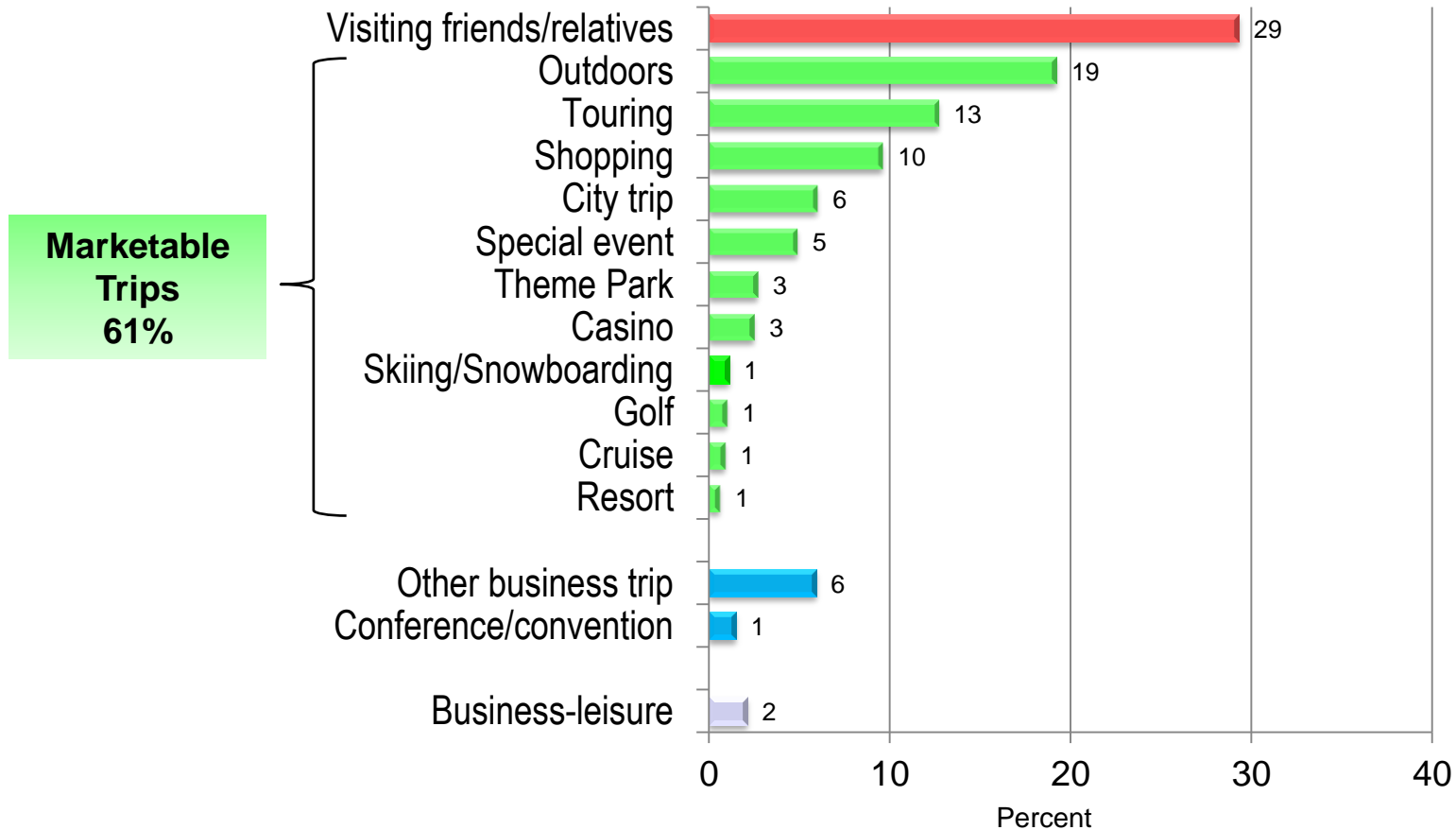


# Day Trip Characteristics

# Main Purpose of Trip



Base: Total Day Person-Trips

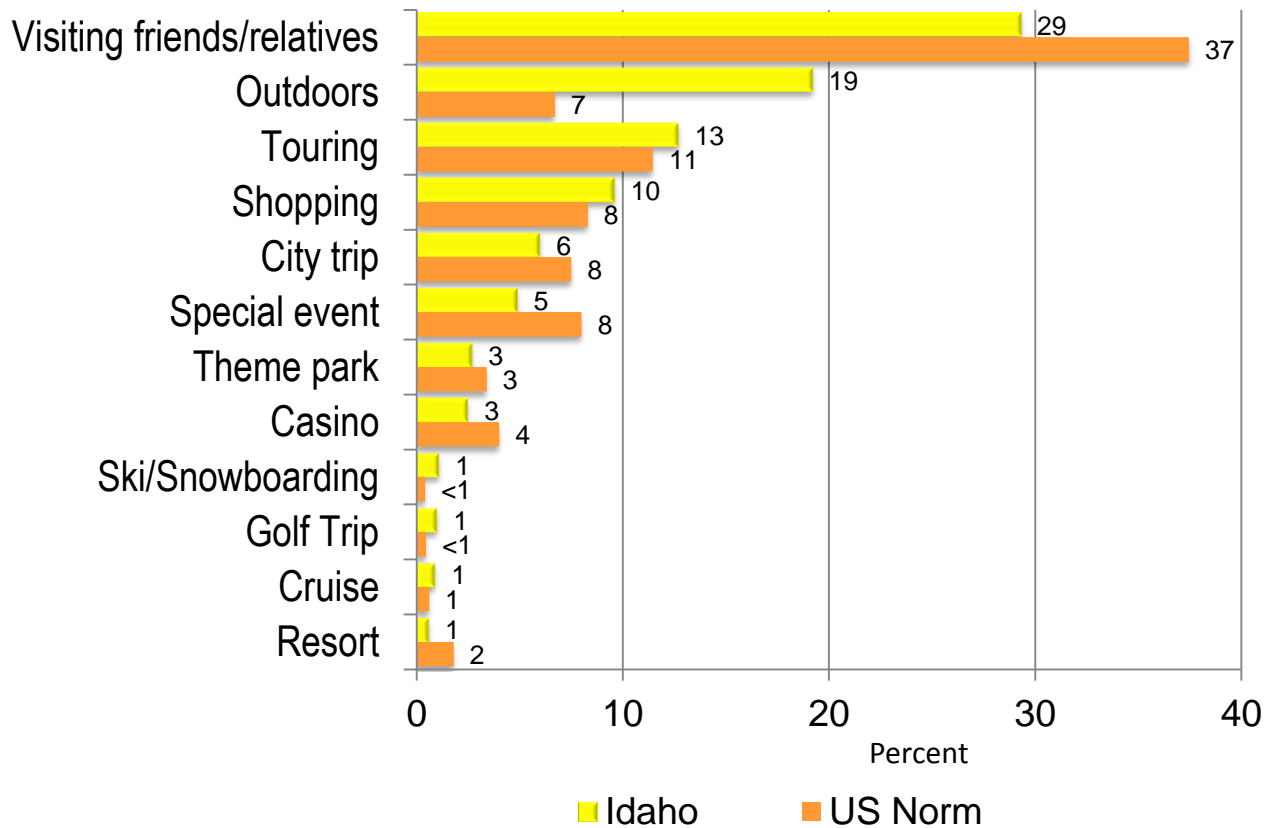




# Main Purpose of Day Leisure Trip — Idaho vs. National Norm



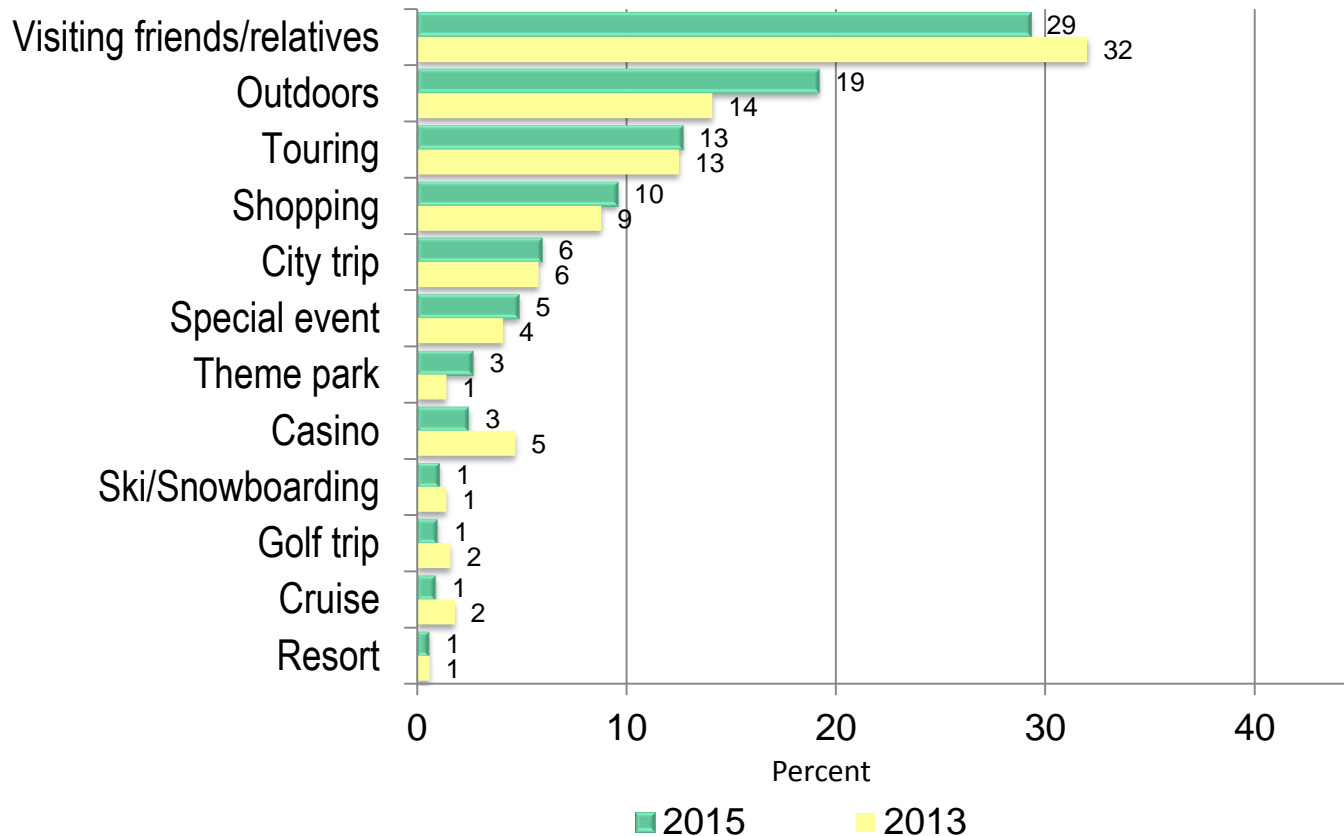
Base: Total Day Person-Trips



# Main Purpose of Day Leisure Trip to Idaho — 2015 vs. 2013



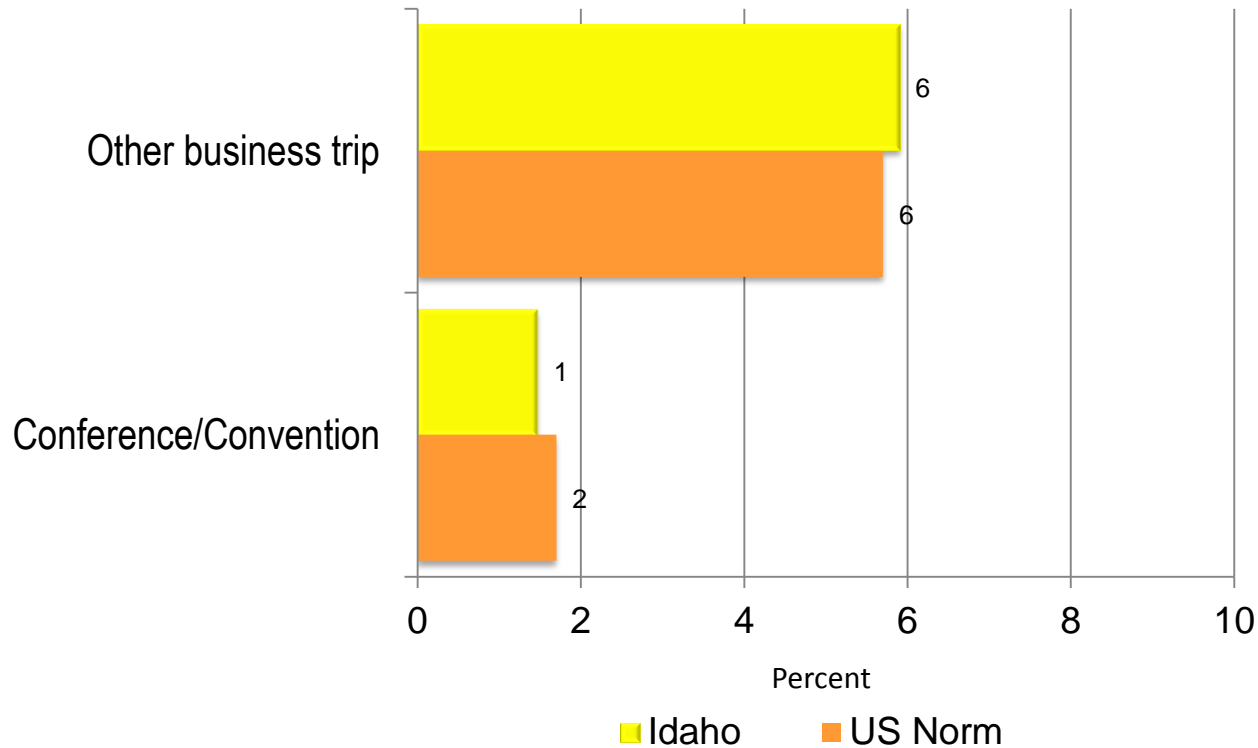
Base: Total Day Person-Trips



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



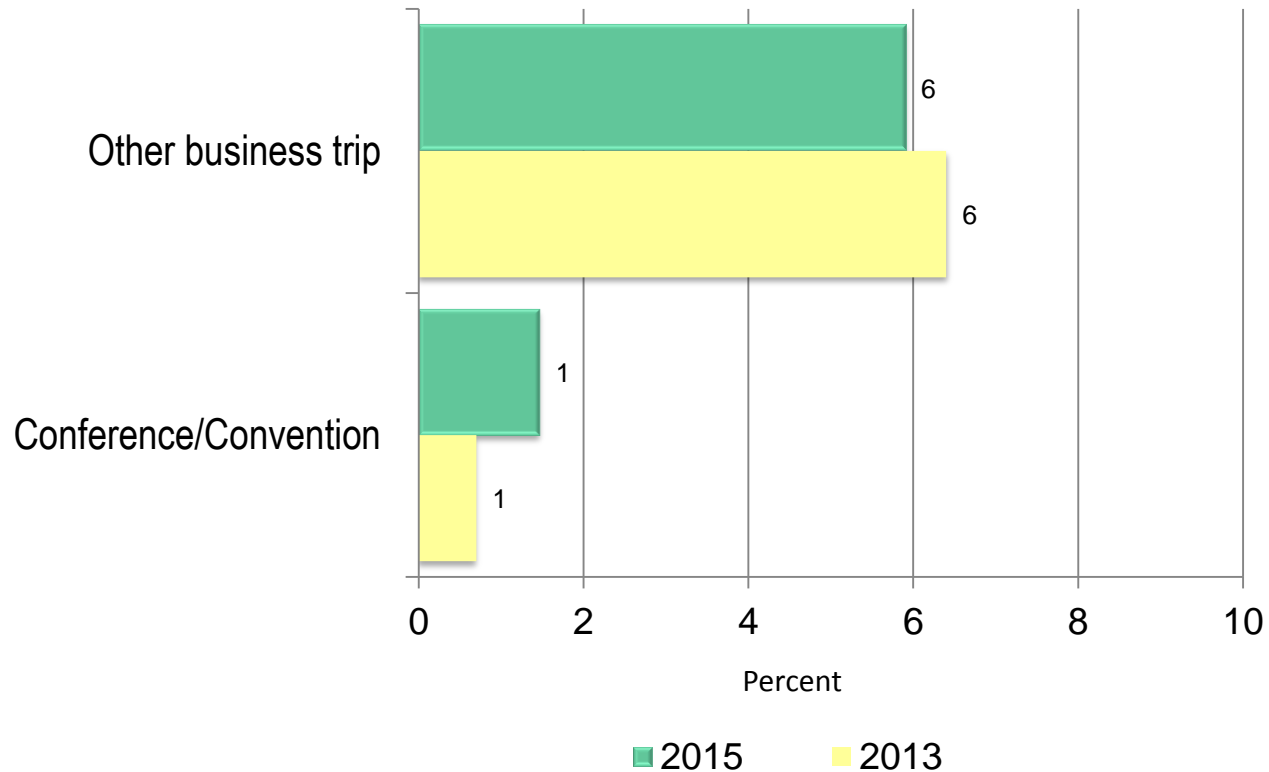
Base: Total Day Person-Trips



# Main Purpose of Business Trip — 2015 vs. 2013



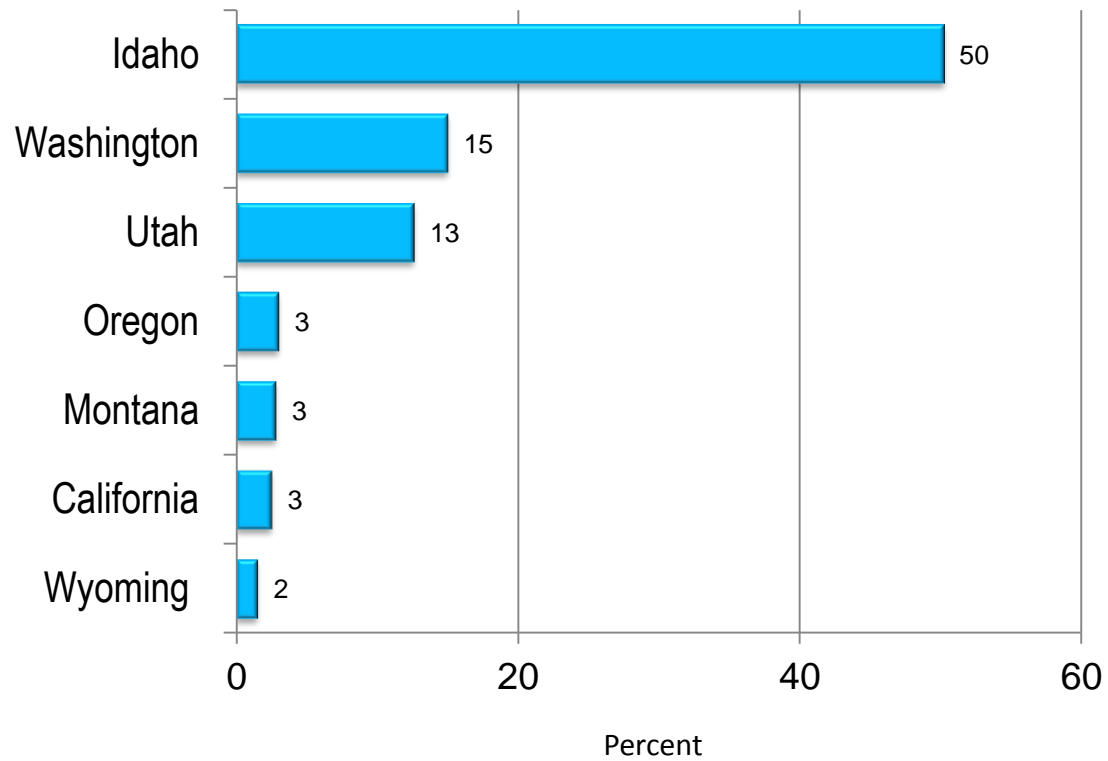
Base: Total Day Person-Trips



# State Origin Of Trip



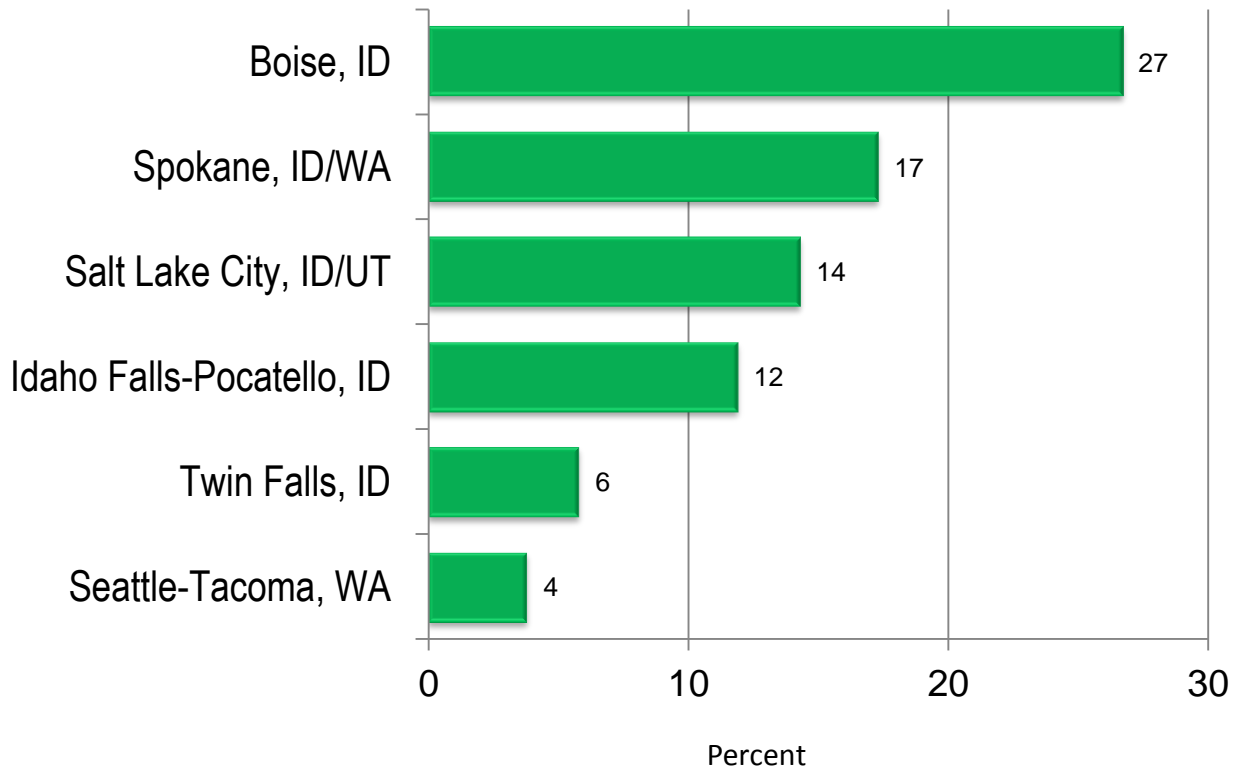
Base: Total Day Person-Trips



# DMA Origin Of Trip



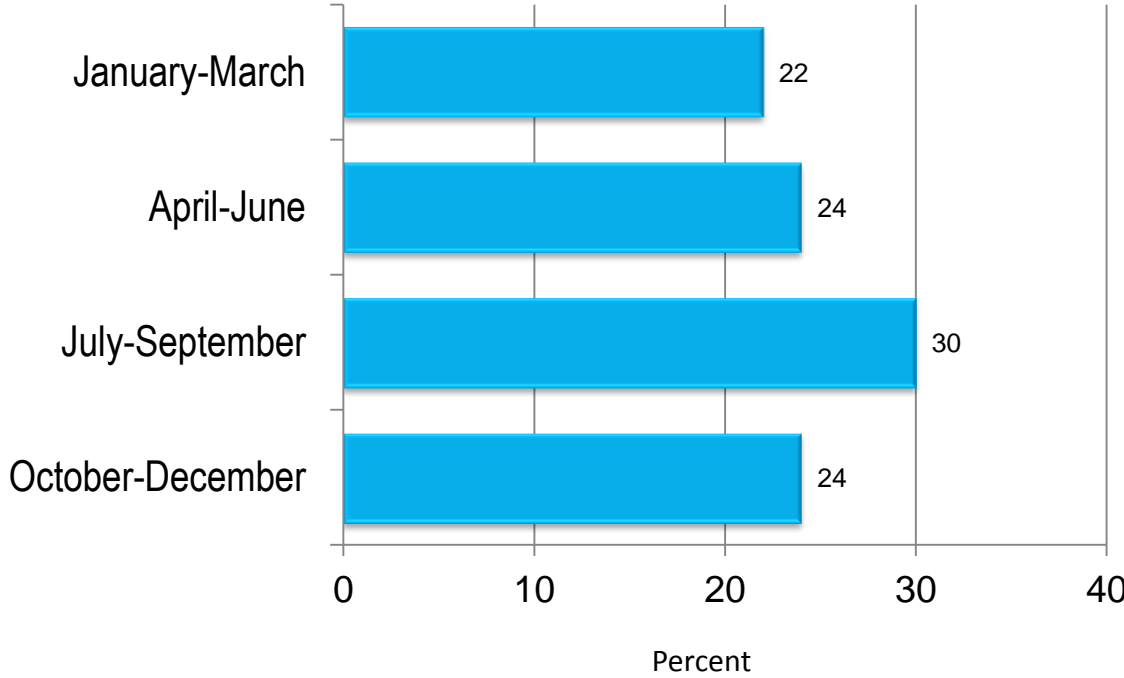
Base: Total Day Person-Trips



# Season of Trip



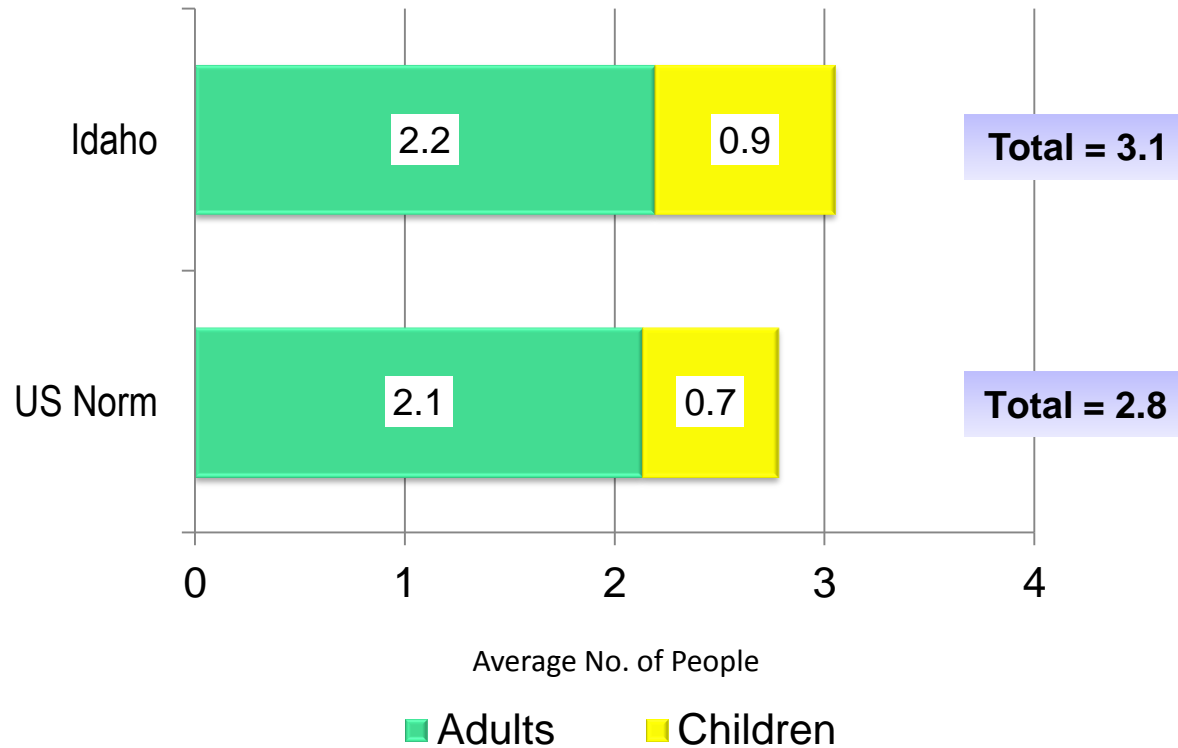
Base: Total Day Person-Trips



# Size of Travel Party



Base: Total Day Person-Trips

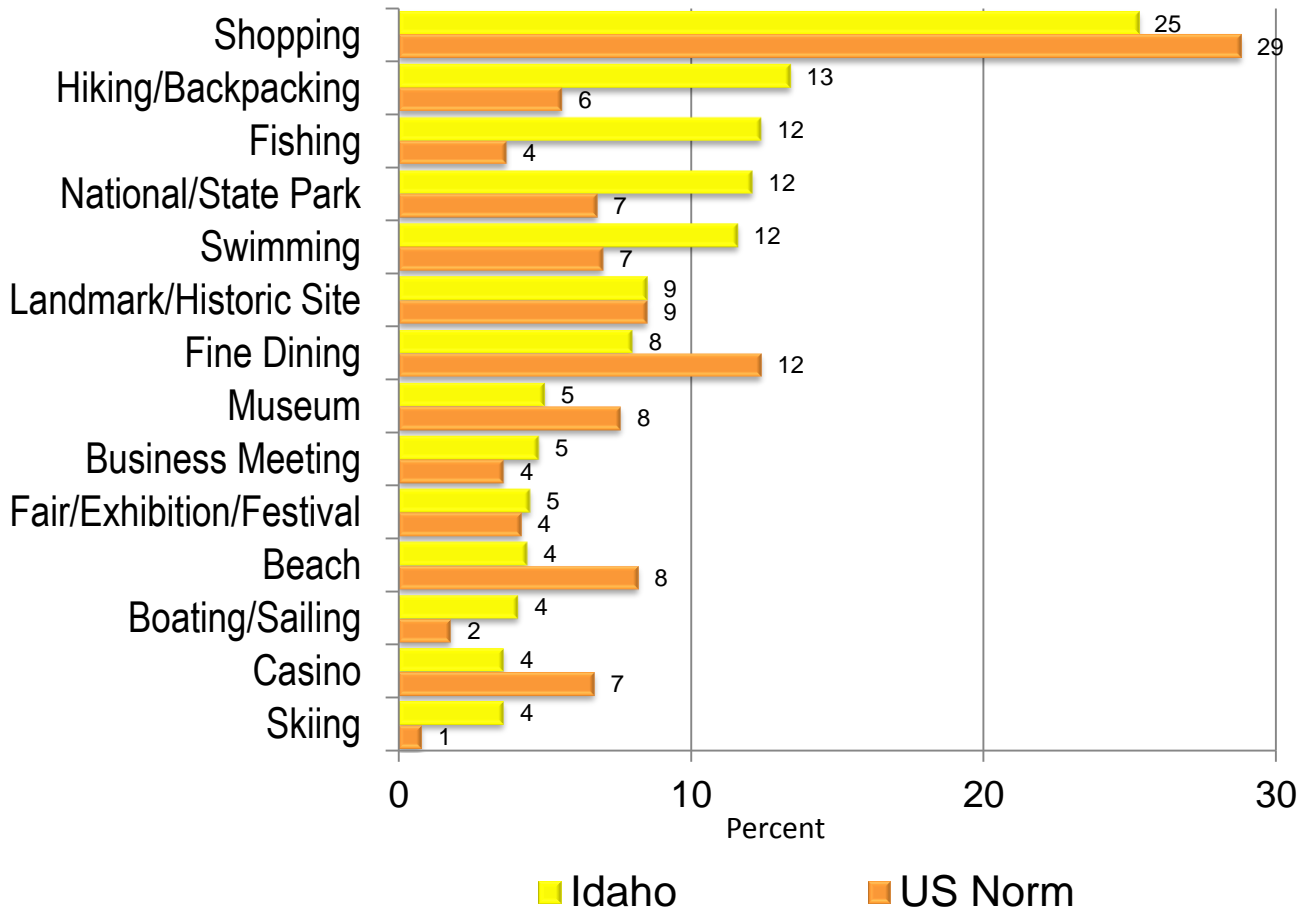




# Activities and Experiences



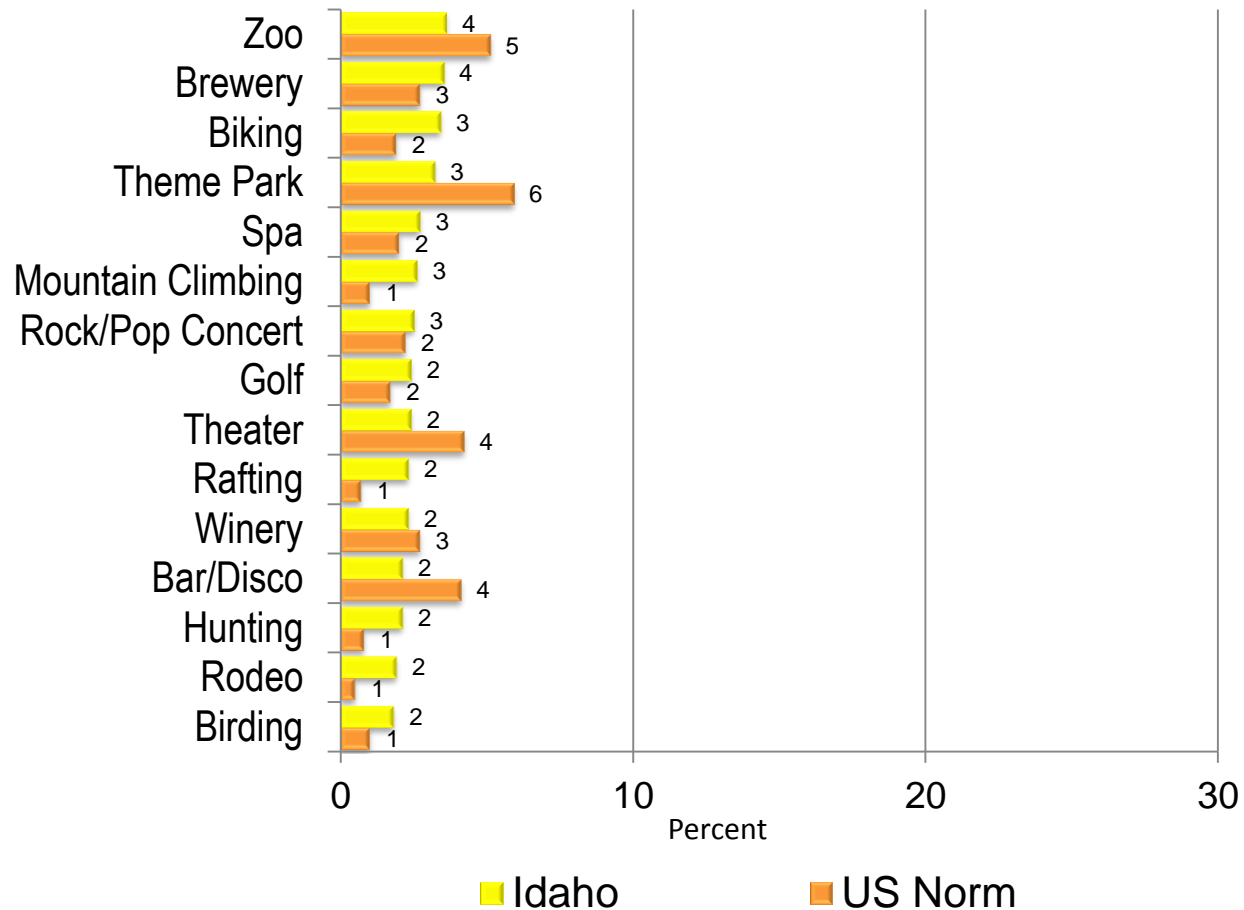
Base: Total Day Person-Trips



# Activities and Experiences (Cont'd)



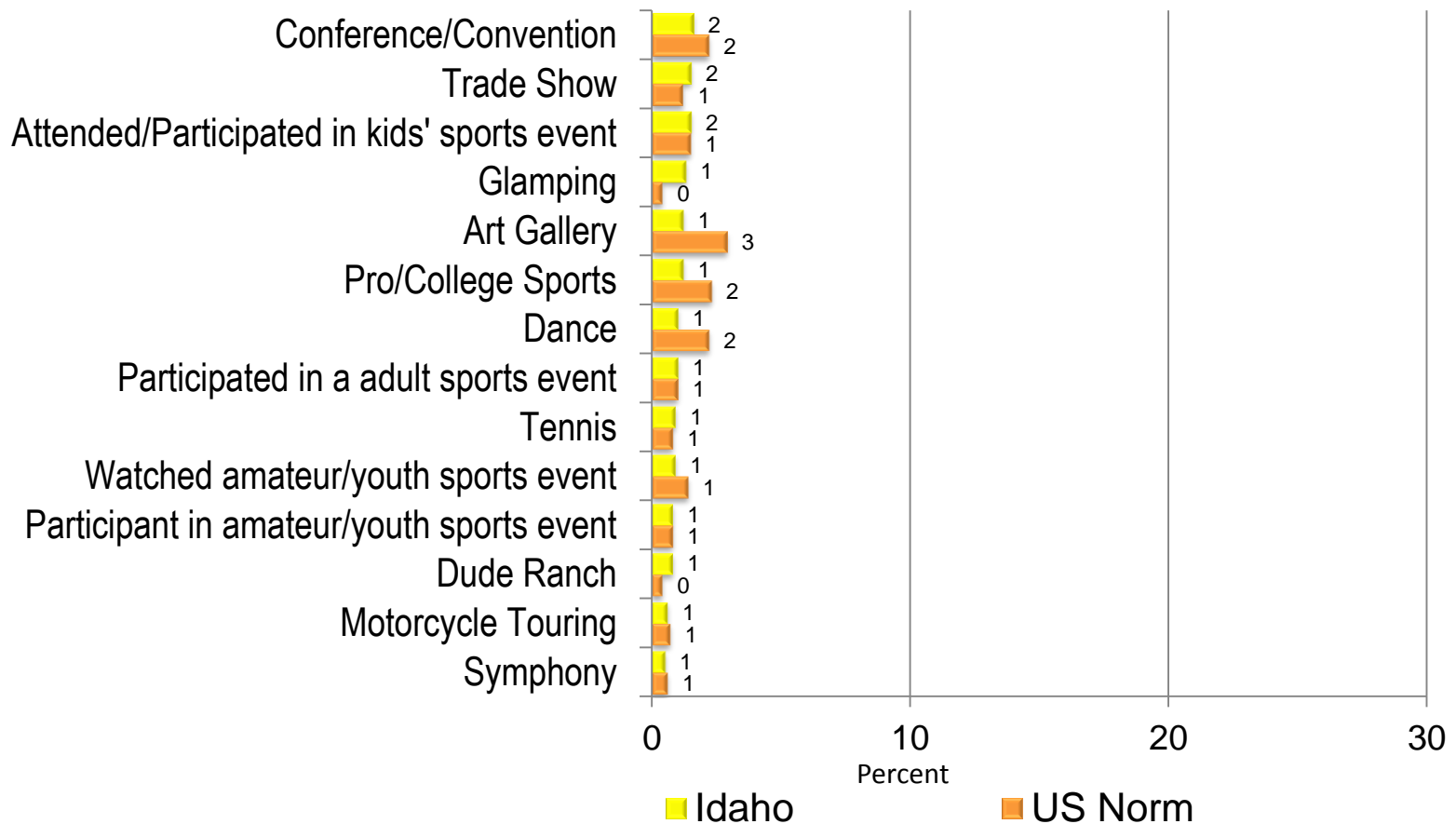
Base: Total Day Person-Trips



# Activities and Experiences (Cont'd)



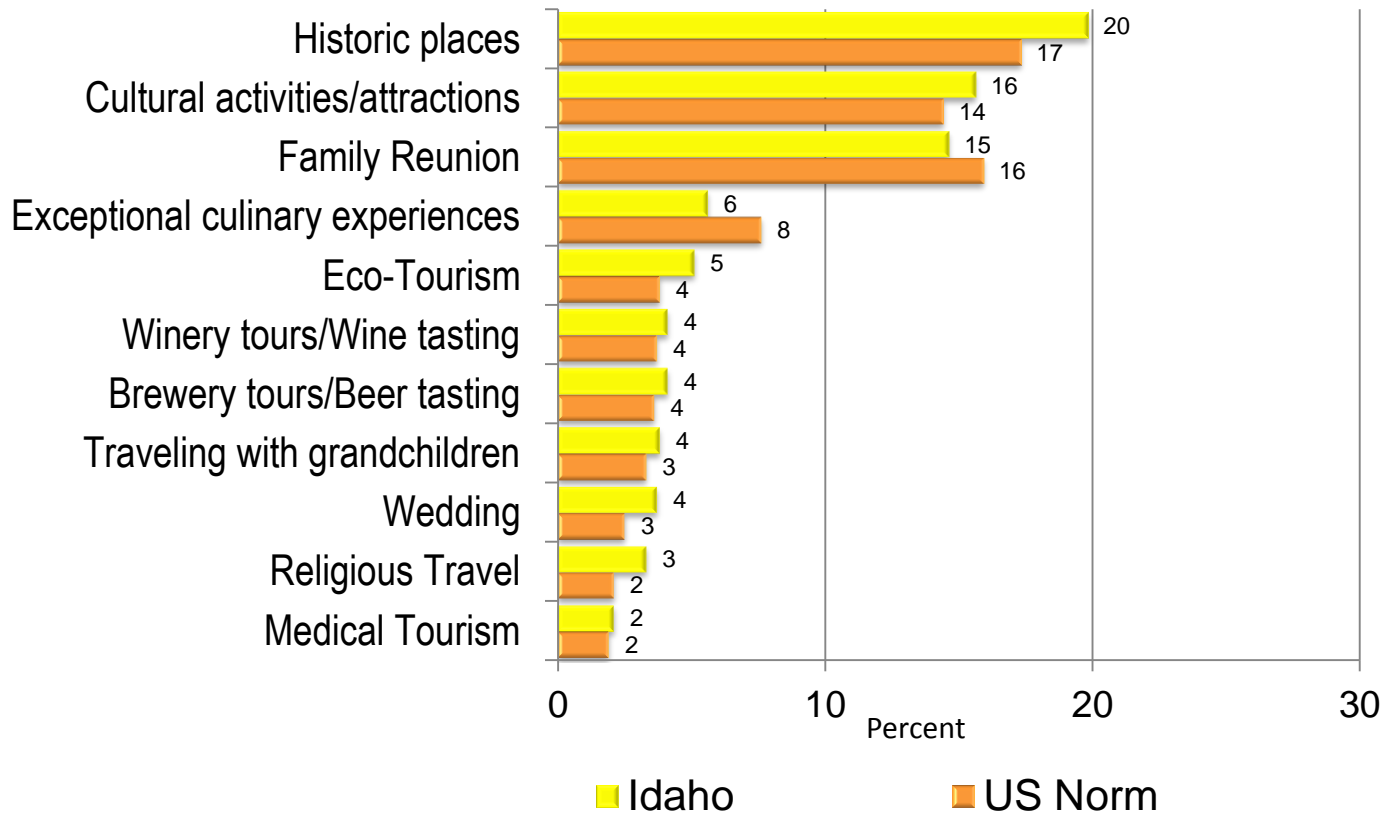
Base: Total Day Person-Trips



# Activities of Special Interest



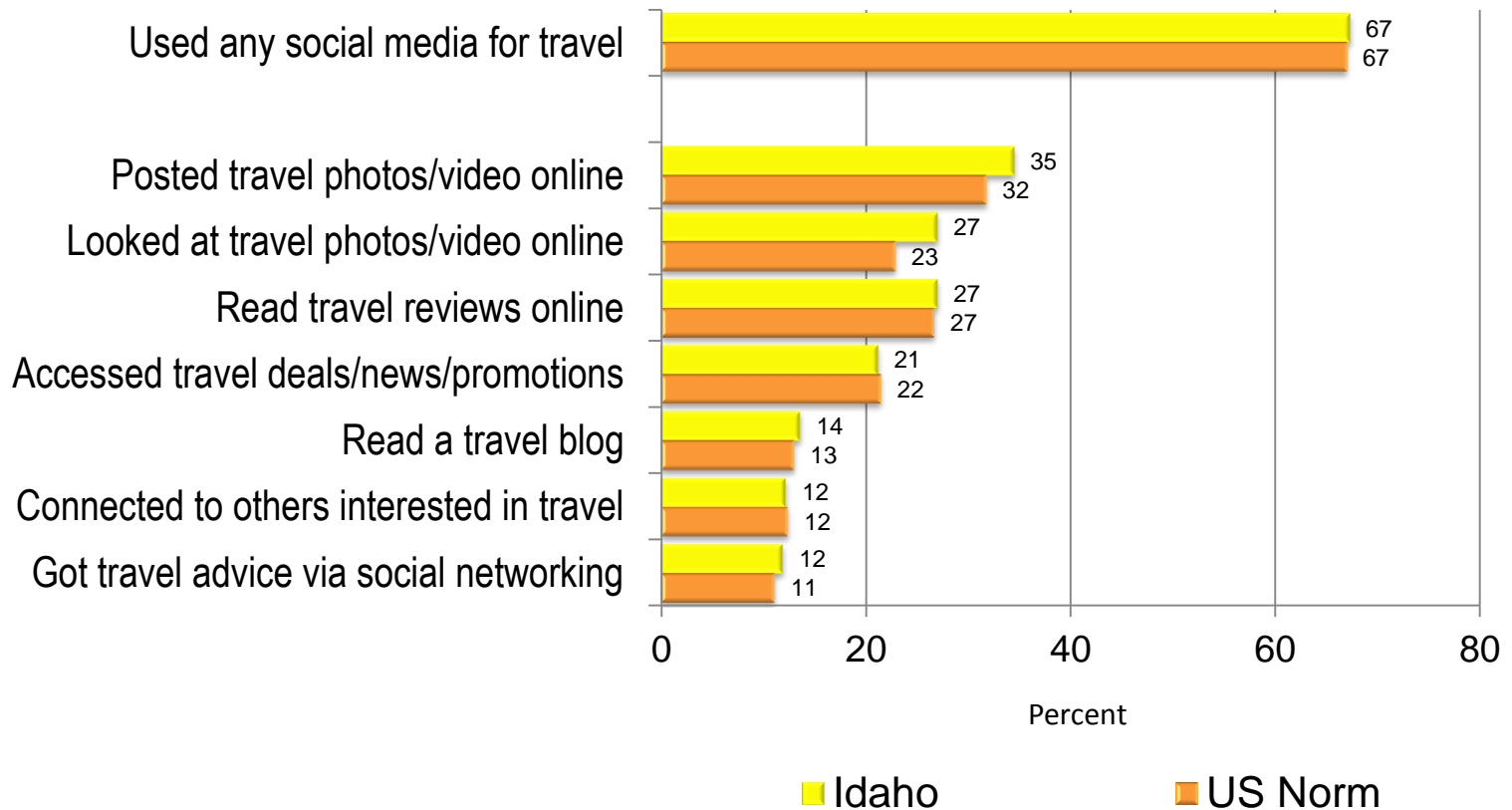
Base: Total Day Person-Trips



# Social Media Use by Travelers



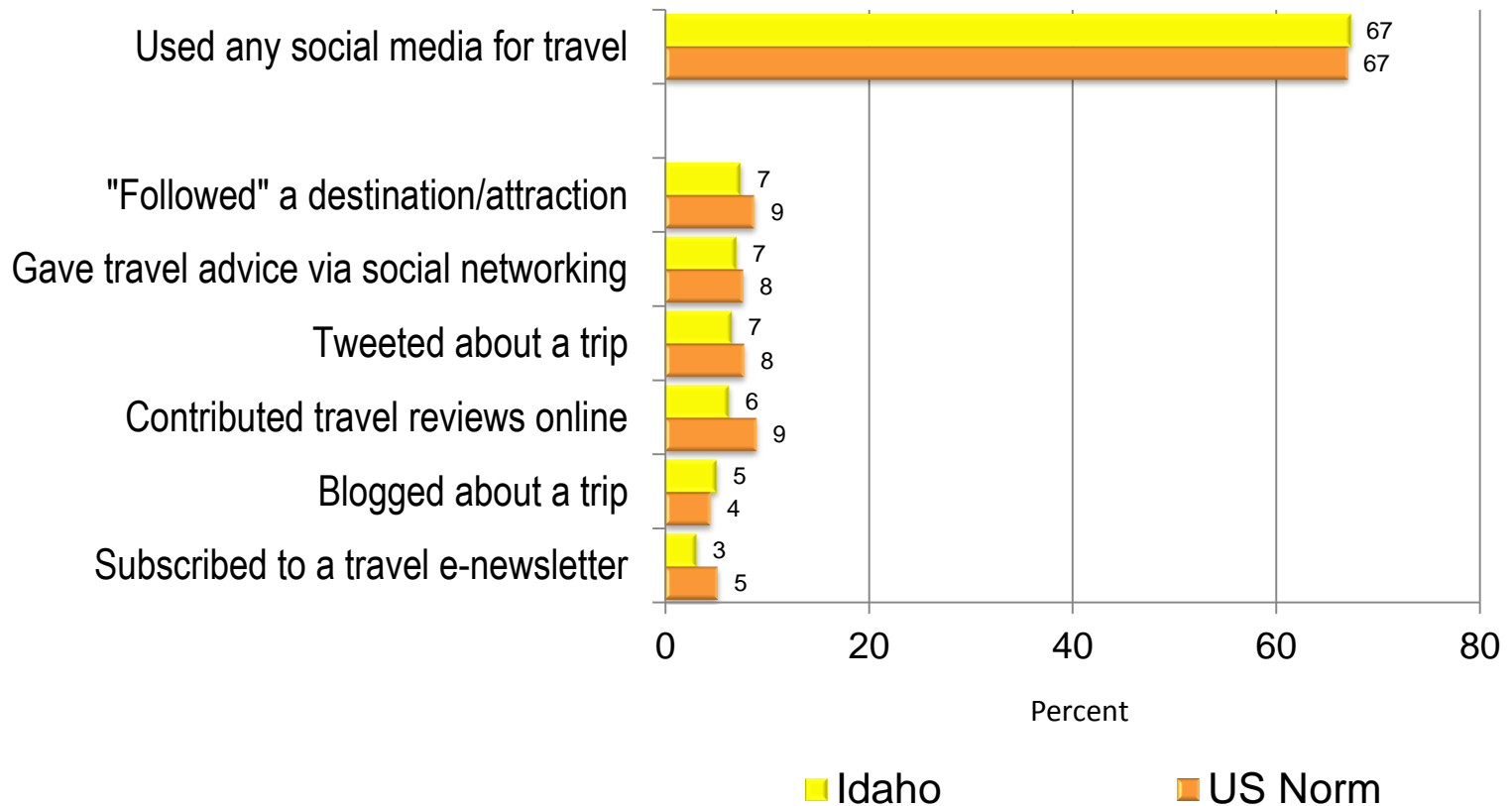
Base: Total Day Person-Trips



# Social Media Use by Travelers (Cont'd)



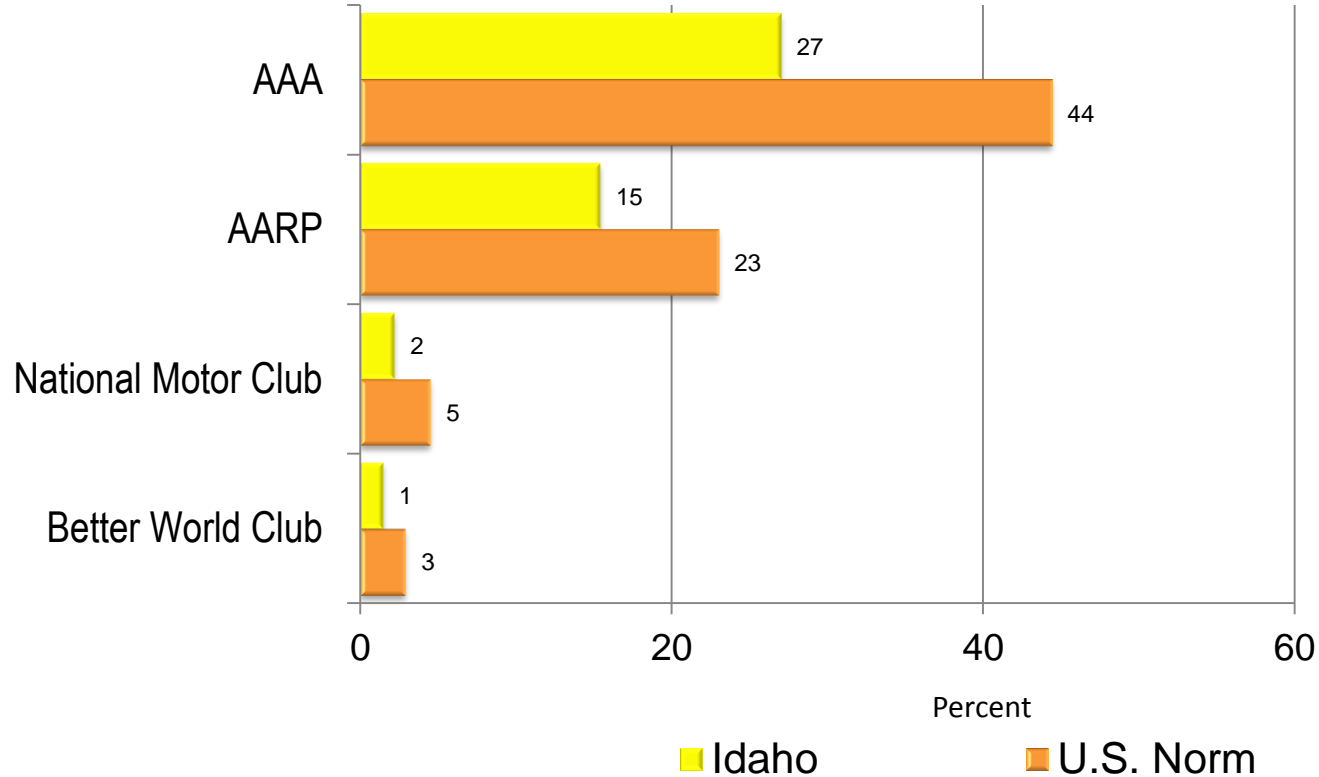
Base: Total Day Person-Trips



# Organization Membership



Base: Total Day Person-Trips





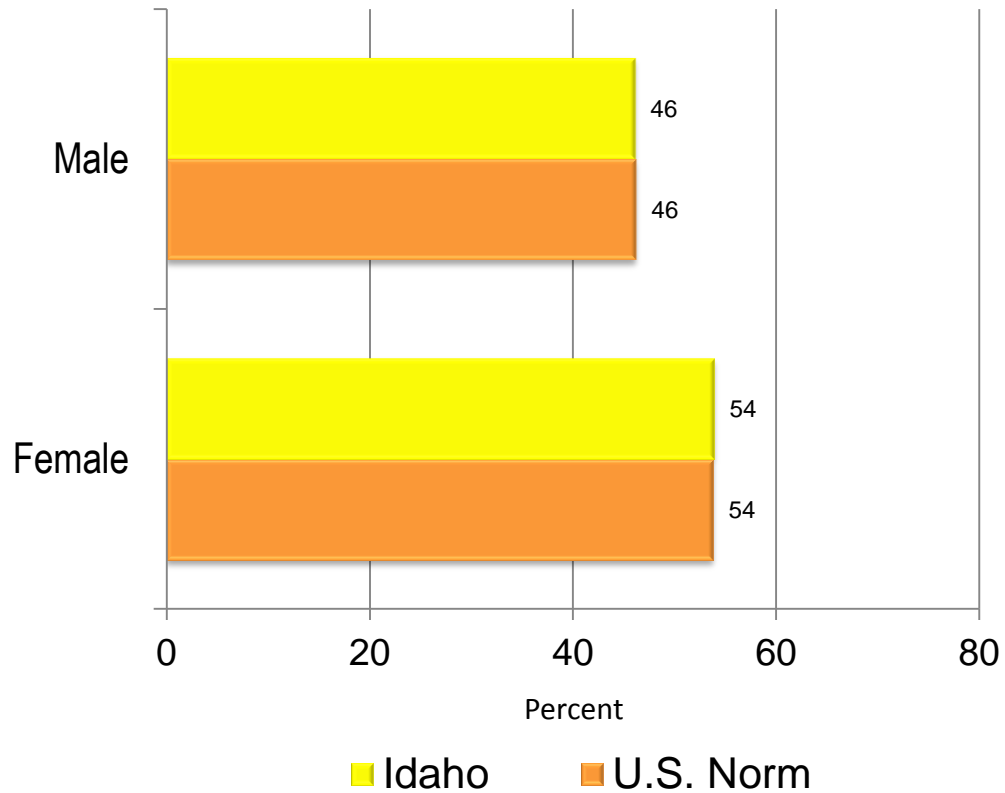
# Demographic Profile of Day Visitors to Idaho



# Gender



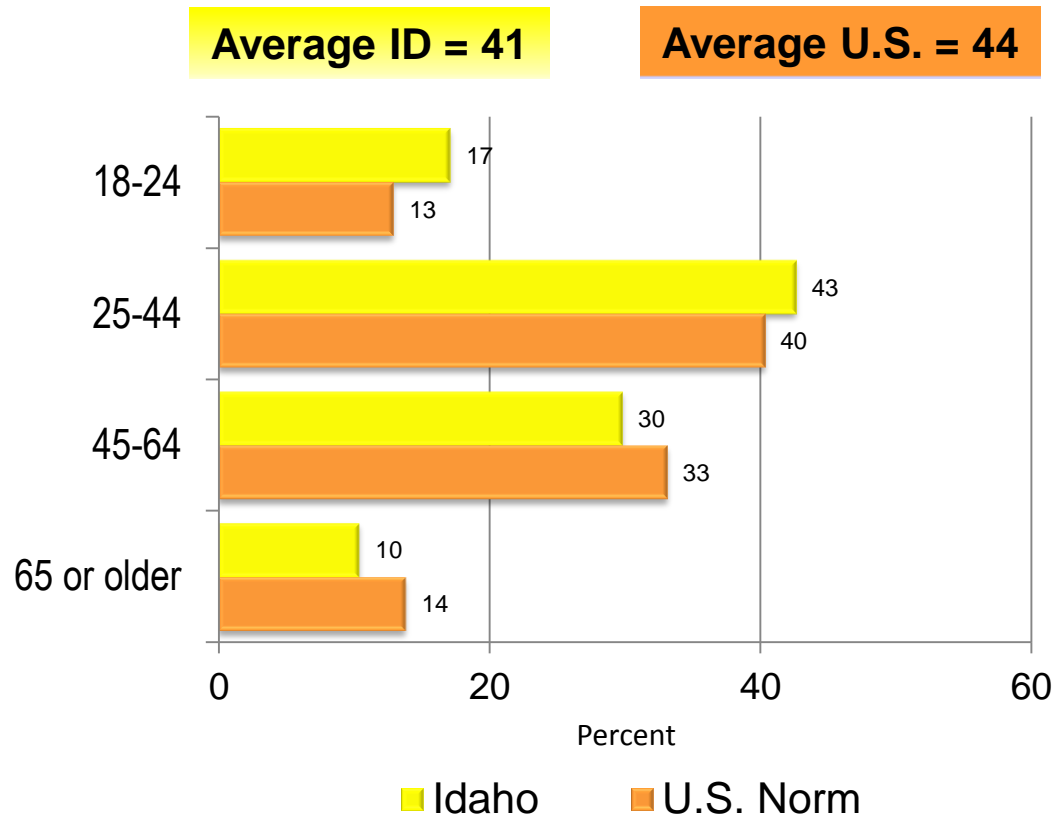
Base: Total Day Person-Trips



# Age



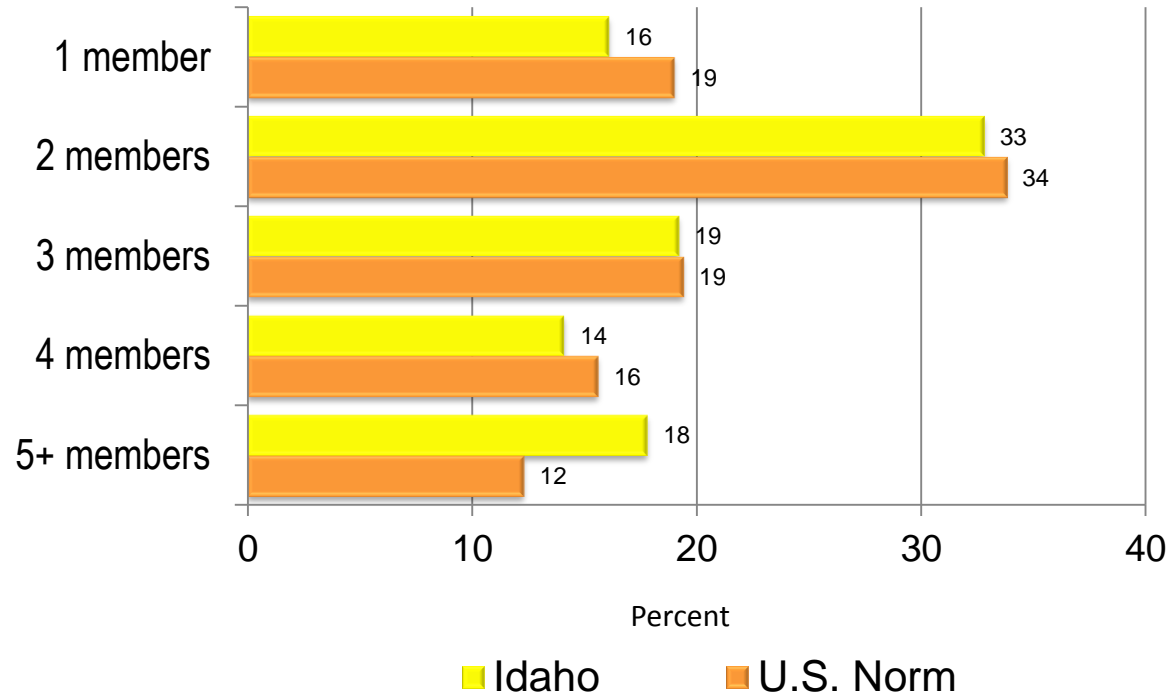
Base: Total Day Person-Trips



# Household Size



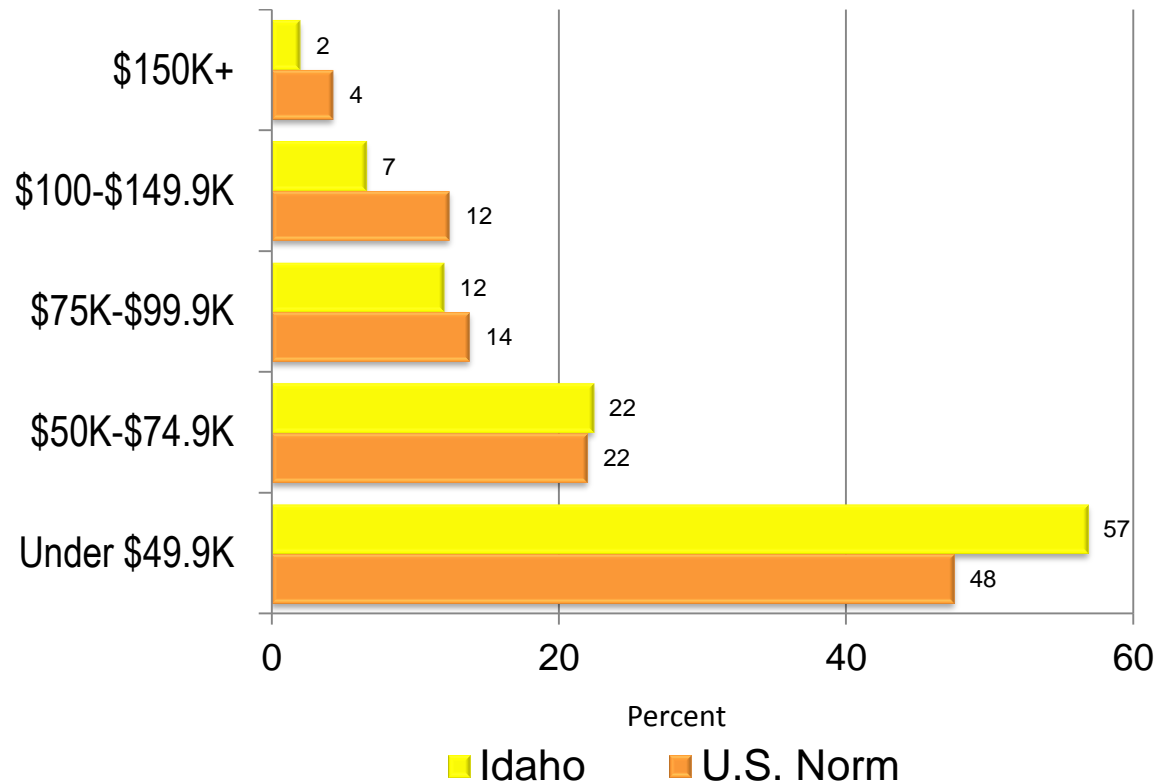
Base: Total Day Person-Trips



# Household Income



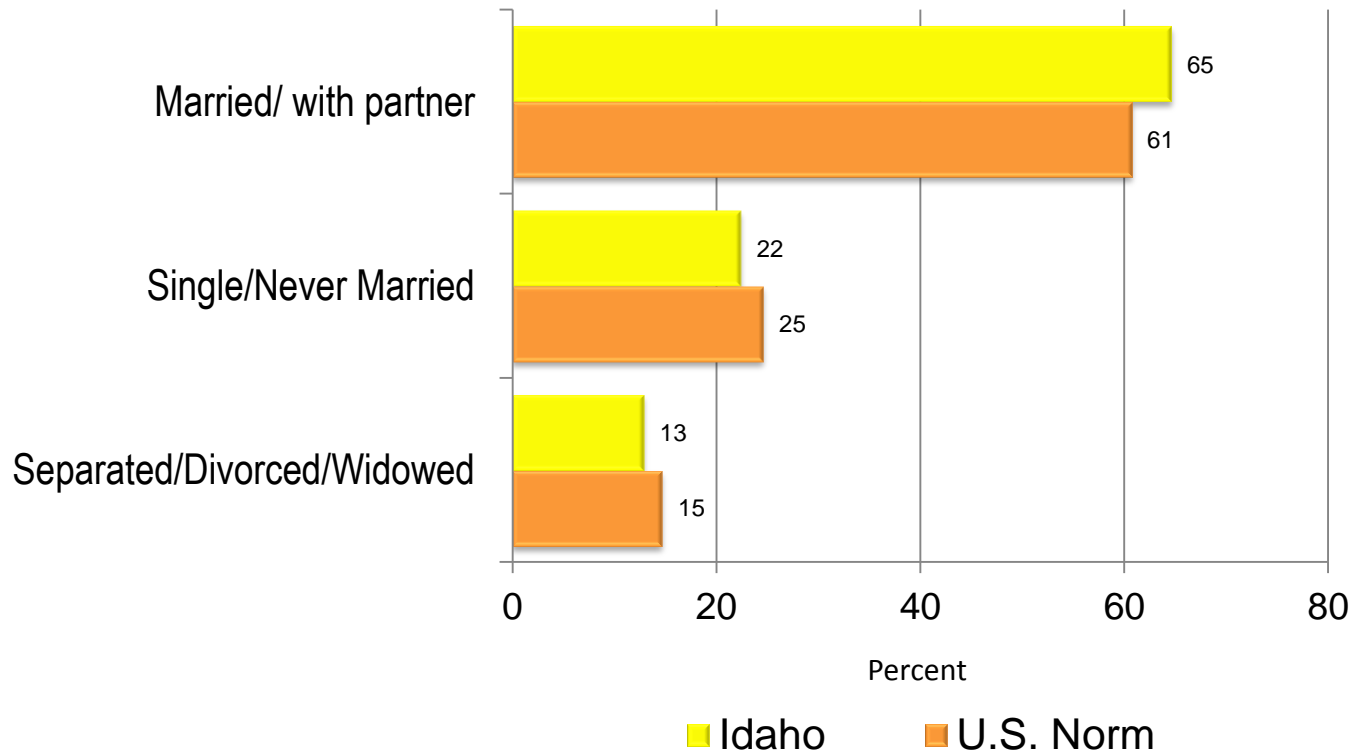
Base: Total Day Person-Trips



# Marital Status



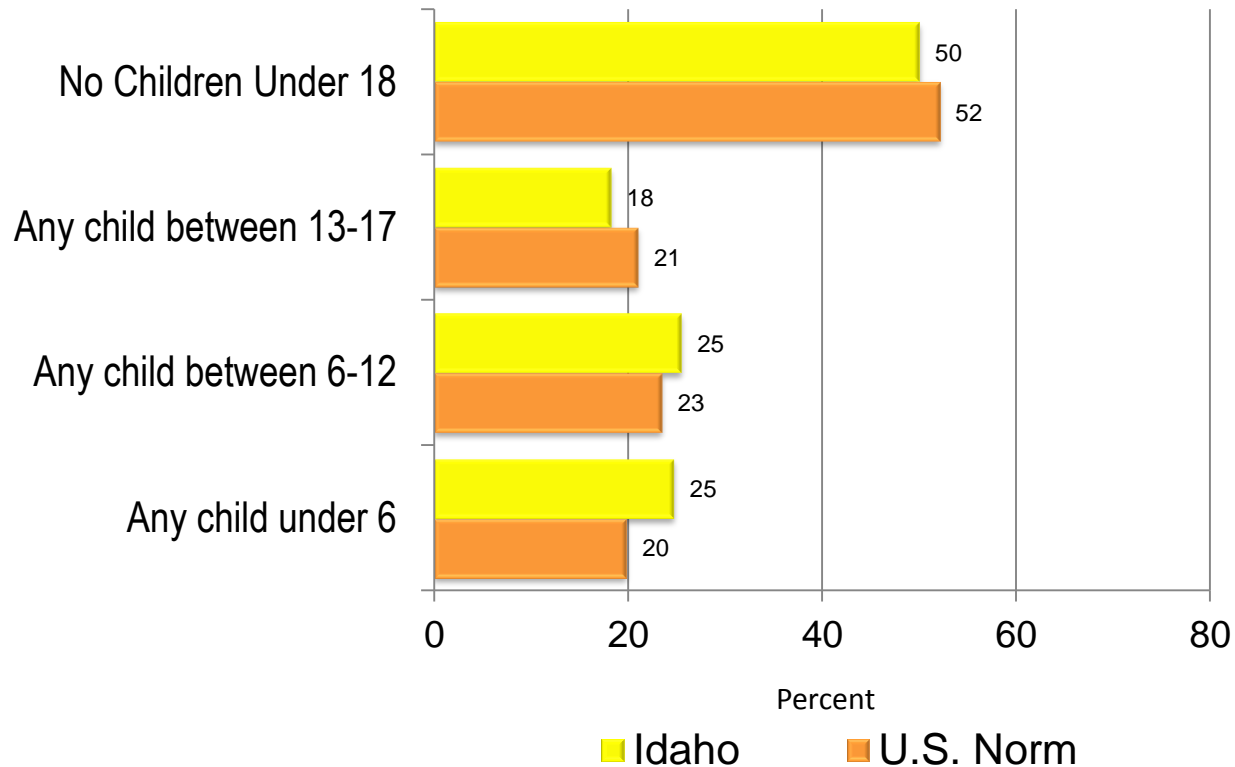
Base: Total Day Person-Trips



# Children in Household



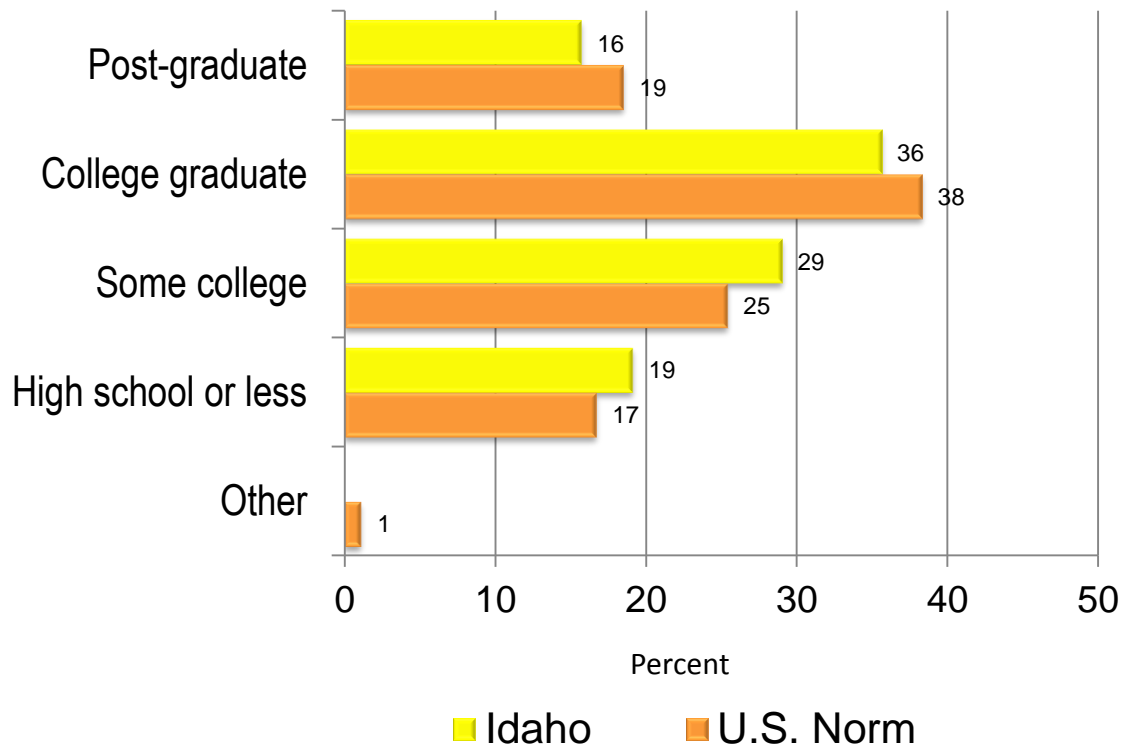
Base: Total Day Person-Trips



# Education



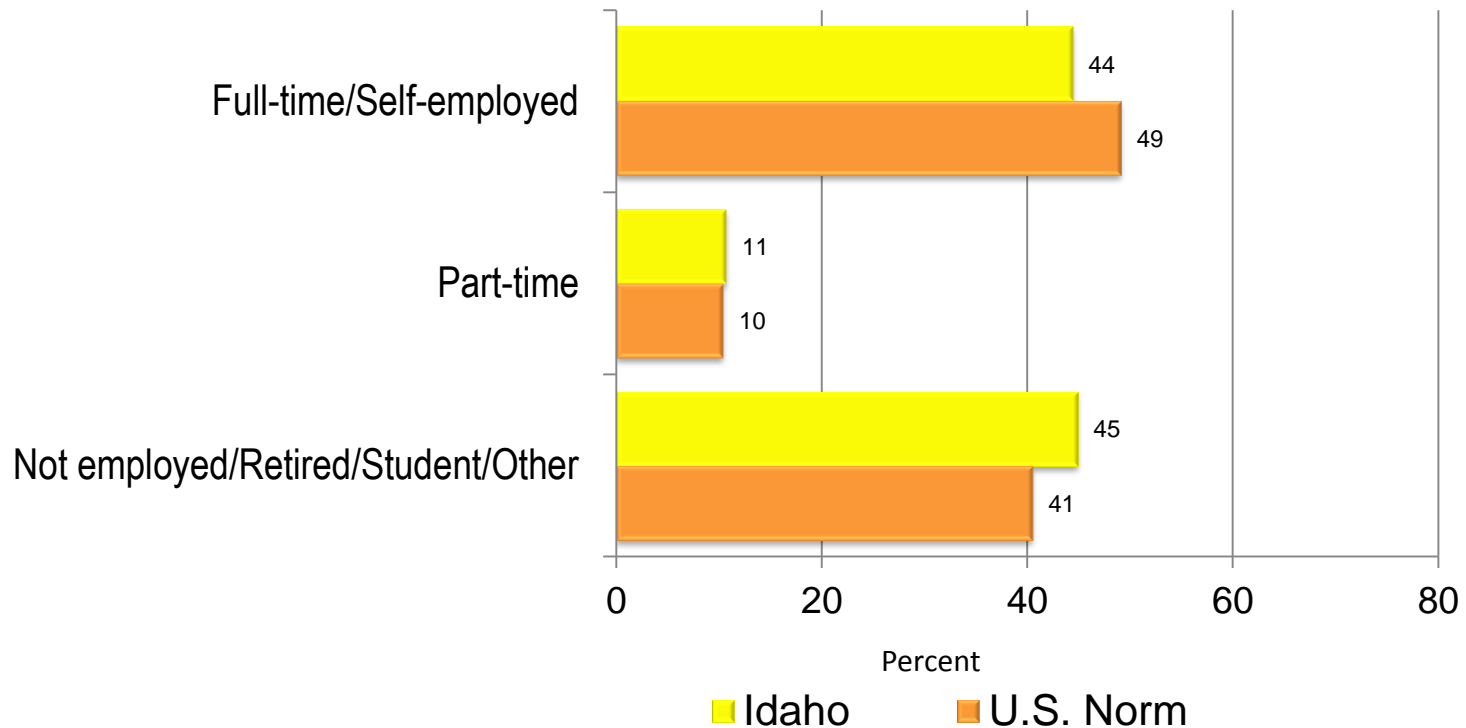
Base: Total Day Person-Trips



# Employment



Base: Total Day Person-Trips

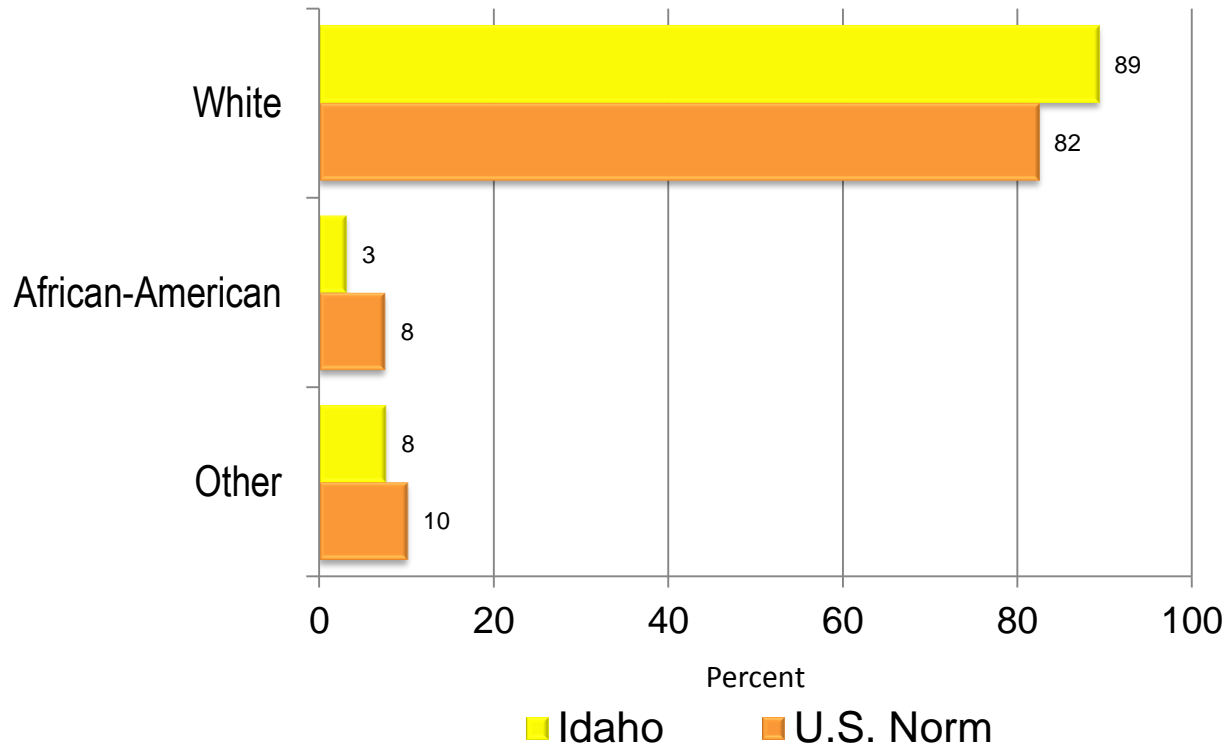




# Race



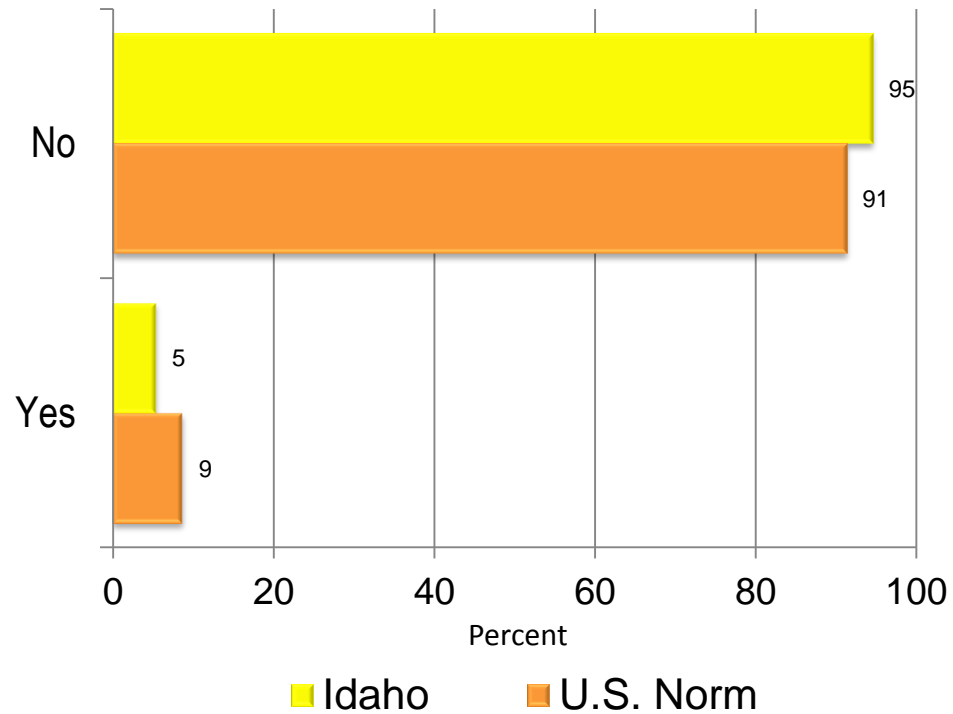
Base: Total Day Person-Trips



# Hispanic Background



Base: Total Day Person-Trips





# Appendix A: Key Terms Defined

# 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