



Idaho 2017 Visitor Research



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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 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 2017.

Research Objectives

- ✓ The visitor research program is designed to provide:
 - ✓ Estimates of domestic overnight and day visitor volumes to Idaho.
 - ✓ A profile of Idaho's performance within its overnight travel market.
 - ✓ Domestic visitor expenditures in Idaho.
 - ✓ Profiles of Idaho's day travel market.
 - ✓ Relevant trends in each of these areas.

Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA**® survey:
 - Selected to be representative of the U.S. adult population
- For the 2017 travel year, this yielded :
 - 329,470 trips for analysis nationally:
 - 232,317 overnight trips
 - 97,153 day trips
- For Idaho, the following sample was achieved in 2017:
 - 2,082 trips:
 - 1,412 overnight trips
 - 670 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 2017, Idaho had 34.3 million person trips, increasing 3.8% from 2015. 40% were overnight trips and 60% were day trips.
- The overnight trips generated \$1.9 billion in spending, increasing 12.2% from 2015.
- When asked about the main purpose of their overnight trip, 49% responded that they were visiting friends and relatives, while 40% 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 type was an outdoor trip.
- The top three states of origin for visitors on overnight trips to Idaho were Idaho, Washington, and Utah. Among DMAs, the top three overnight visitor sources were Boise, Salt Lake City, and Spokane.

Key Findings (Cont'd)

- Eighty percent (80%) of visitors on an overnight trip to Idaho were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were safety and security (75%) and friendliness of the locals (70%).
- Among those on overnight trips to Idaho, 88% have visited Idaho at least once before and 71% have visited in the past year.
- Similar to the national average, over half (63%) of the overnight trips were planned 2 months or less before the trip. Similar to the national average, 14% did not plan anything in advance.
- Advice from relatives or friends, online travel agencies and destination websites were the most common planning sources for a Idaho overnight trip. Hotels and resorts were the most common booking source.

Key Findings (Cont'd)

- The average number of nights spent in Idaho on an overnight trip was 3.3 nights, remaining consistent with 2015. The average travel party size was 3.3 persons.
- Three-quarters (78%) of overnight Idaho travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight trip to Idaho were shopping, visiting a national or state park, visiting landmarks or historic sites, hiking and backpacking, and fine dining.
- Seventy percent (70%) of Idaho visitors traveled with a partner or spouse, and 38% traveled with children. Nearly one-fifth (19%) traveled alone.

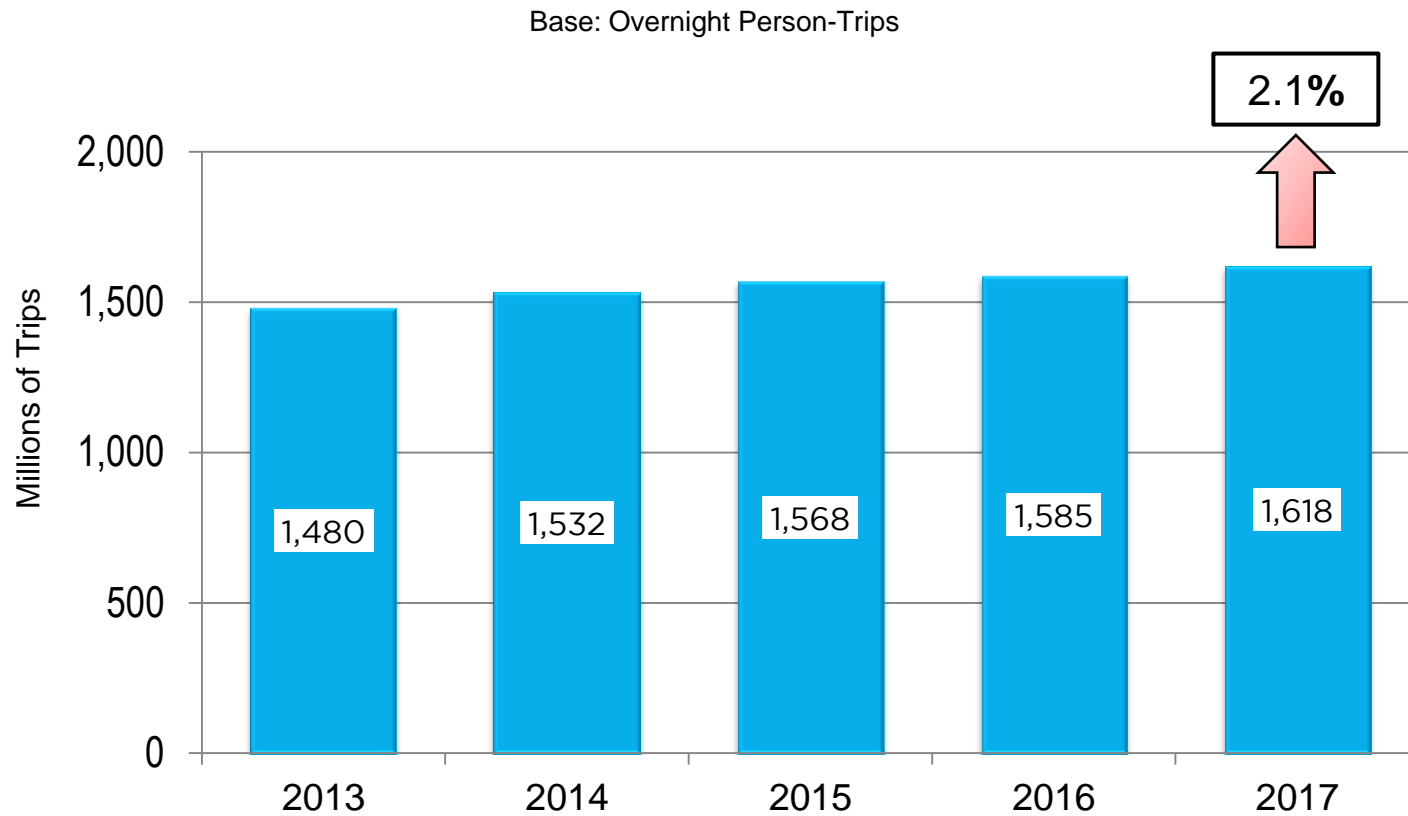


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40 YEARS TOGETHER

Size & Structure of the U.S. Travel Market

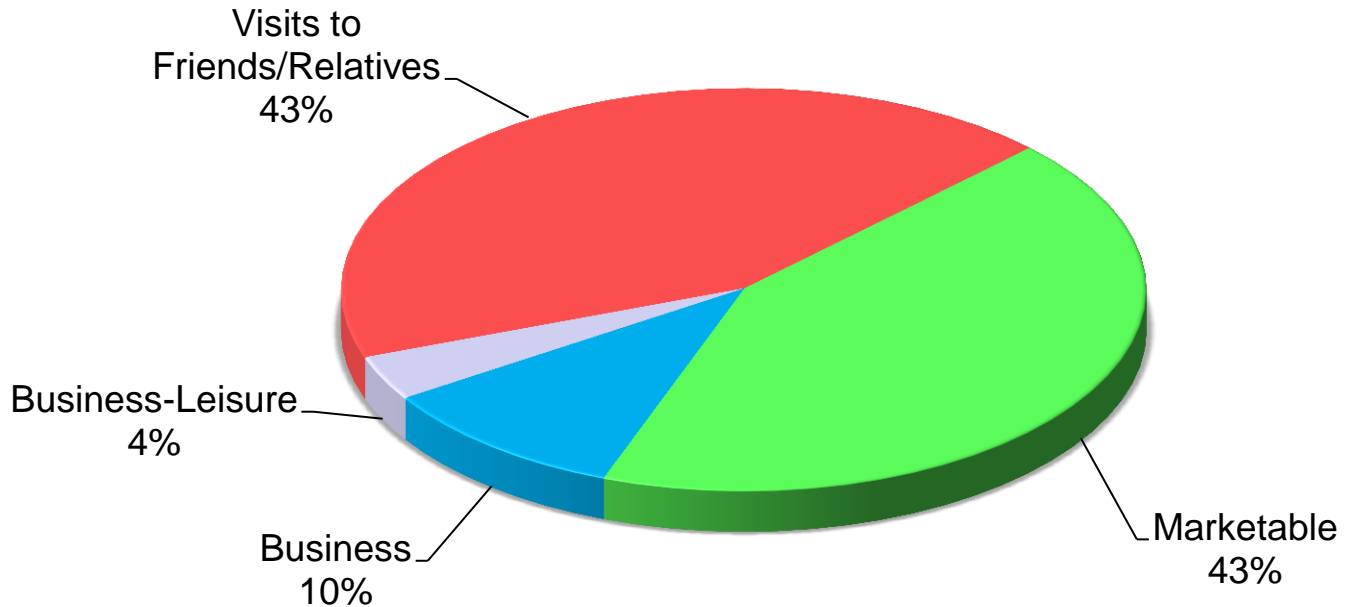


Total Size of the U.S. Travel Market — 2013-2017



Structure of the U.S. Travel Market — 2017 Overnight Trips

Base: Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2017 vs. 2016





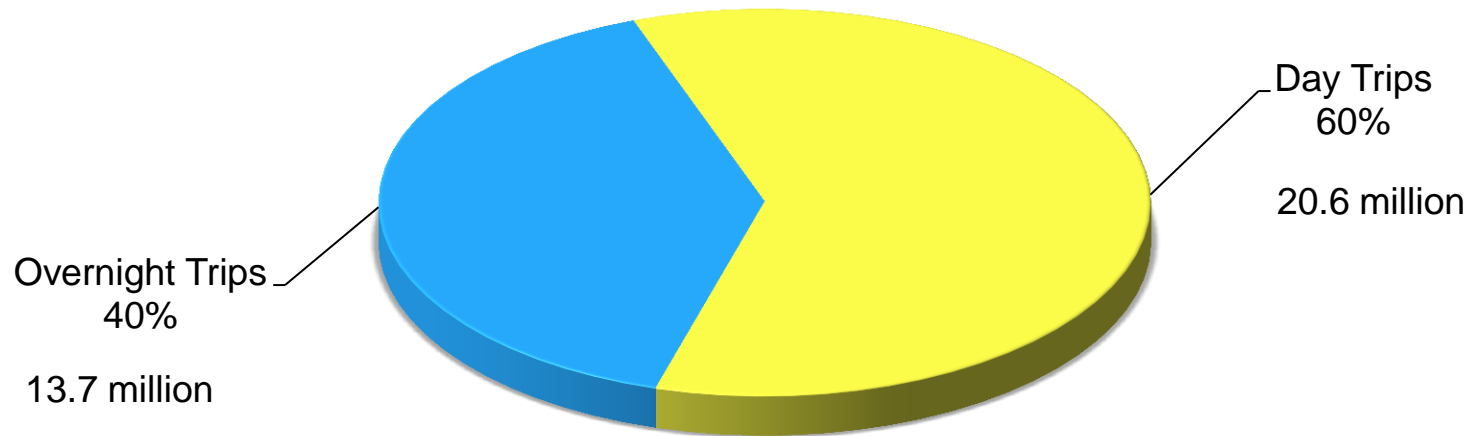
Size & Structure of Idaho's Domestic Travel Market



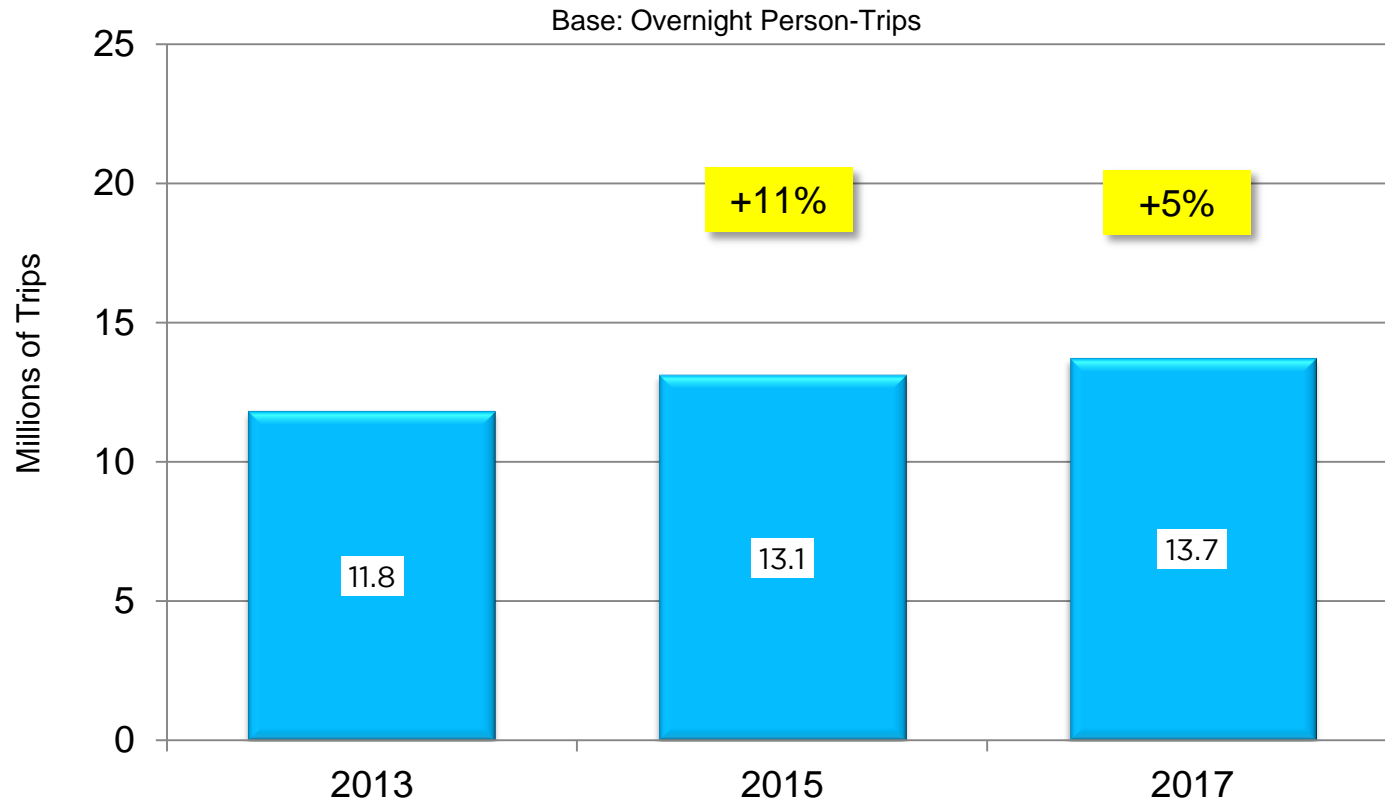
Total Size of Idaho's 2017 Domestic Travel Market

Total Person-Trips = 34.3 million

+3.8% vs. 2015

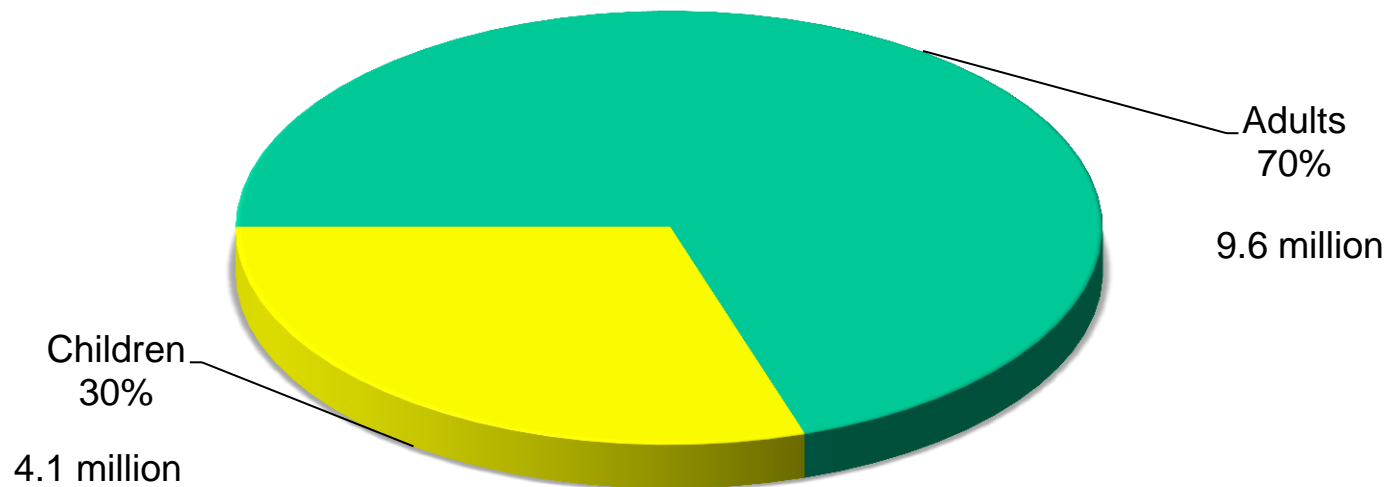


Overnight Trips to Idaho



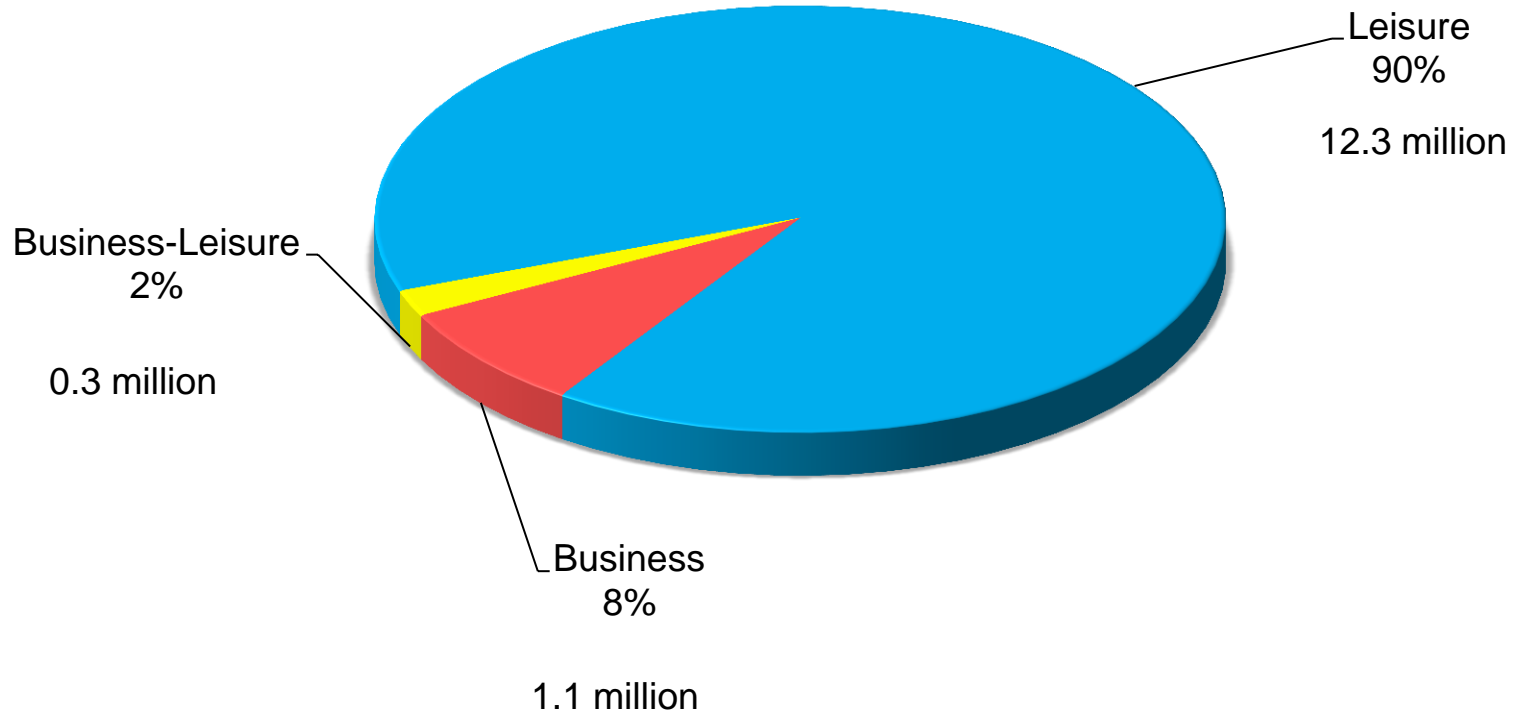
Size of Idaho's Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 13.7 million



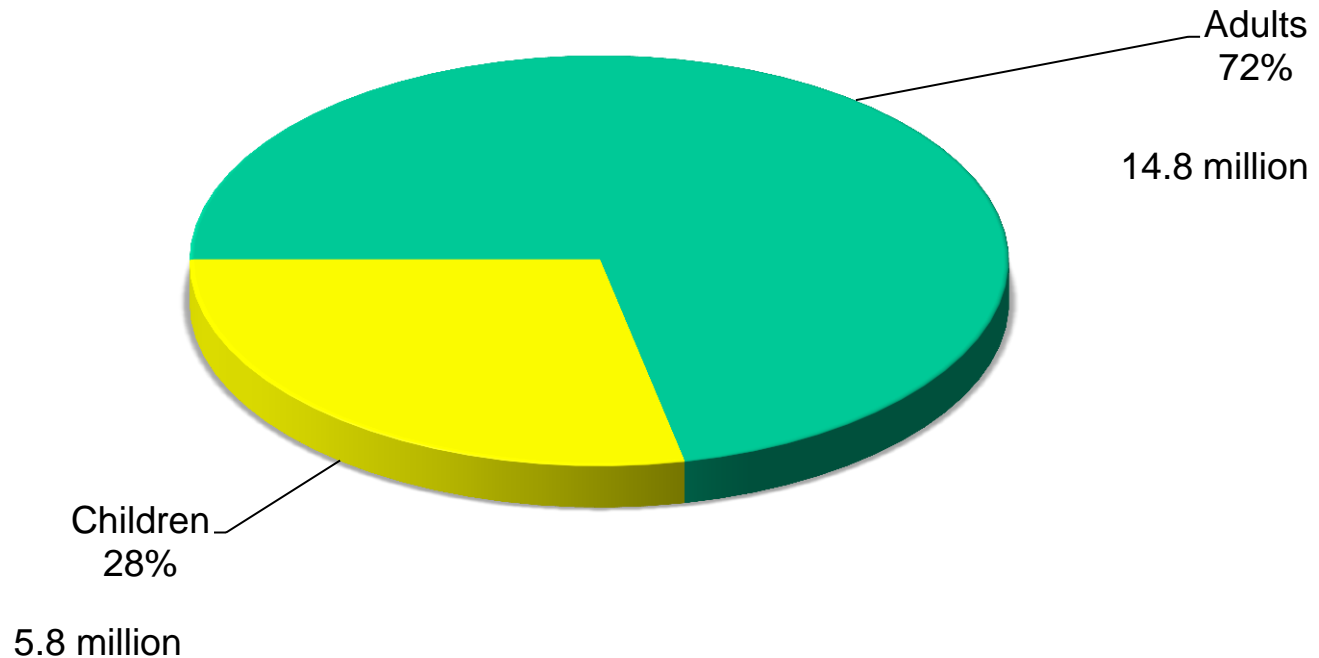
Idaho's Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 13.7 million



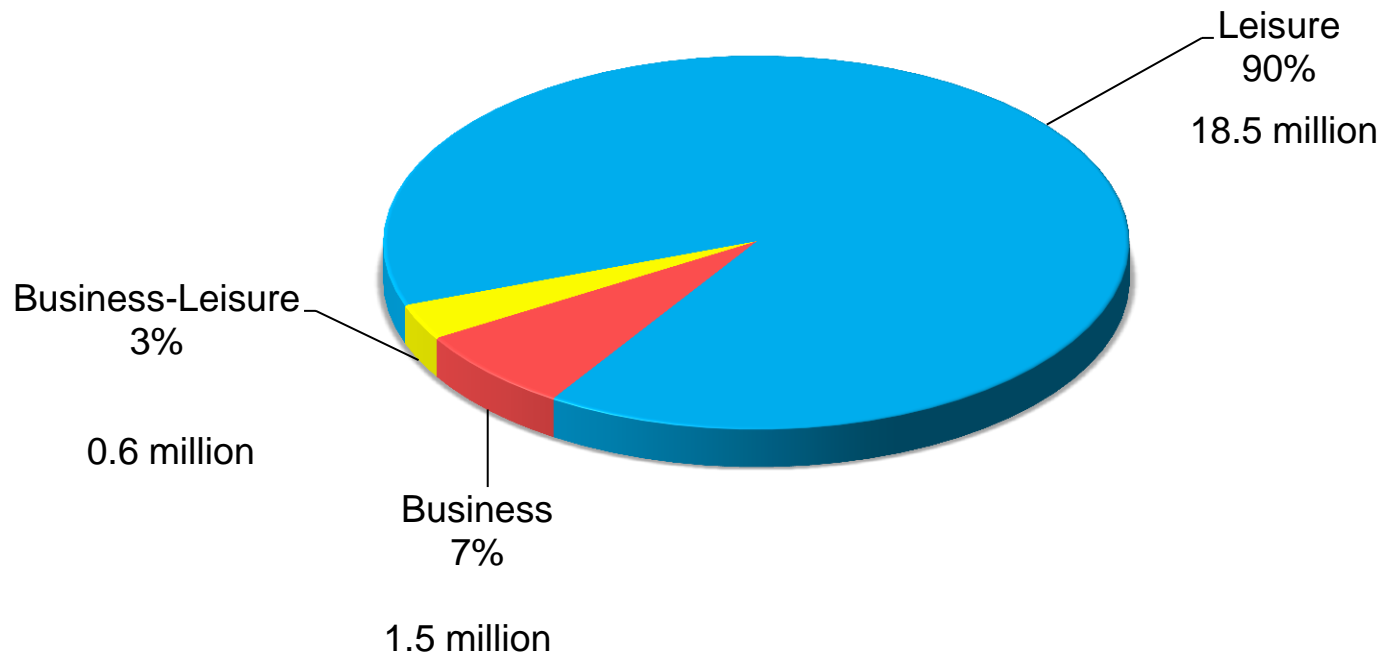
Size of Idaho's Day Travel Market — Adults vs. Children

Total Day Person-Trips = 20.6 million



Idaho's Day Travel Market — by Trip Purpose

Total Day Person-Trips = 20.6 million





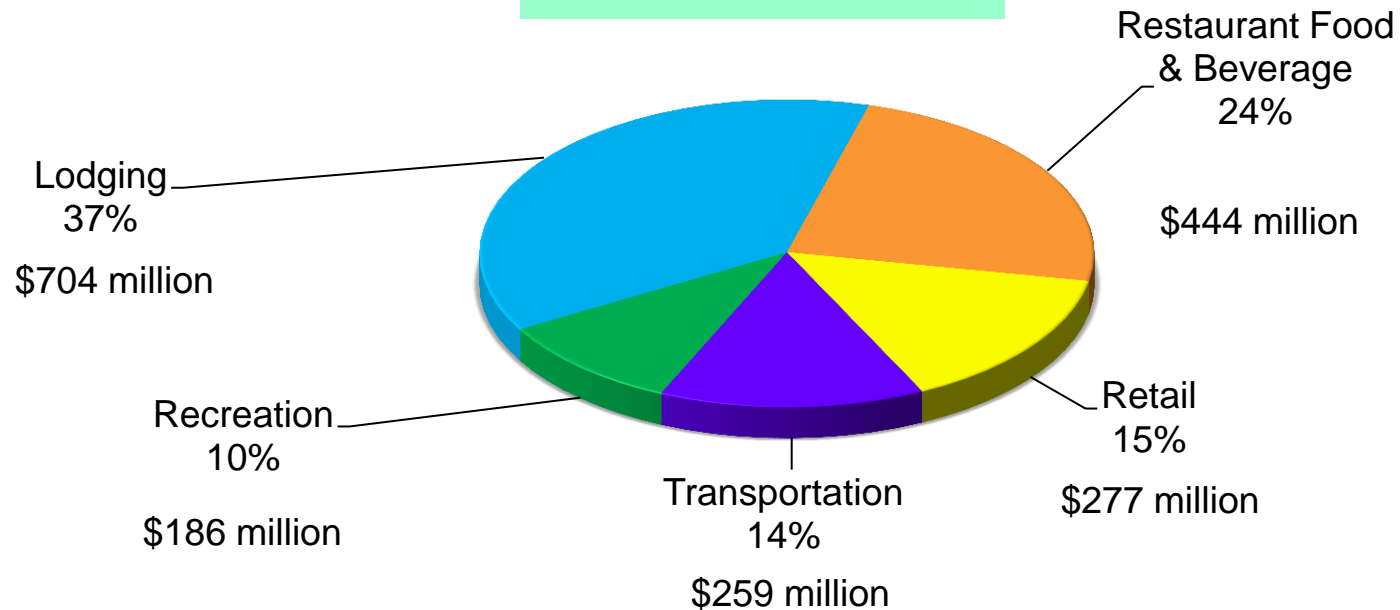
Overnight Trip Expenditures



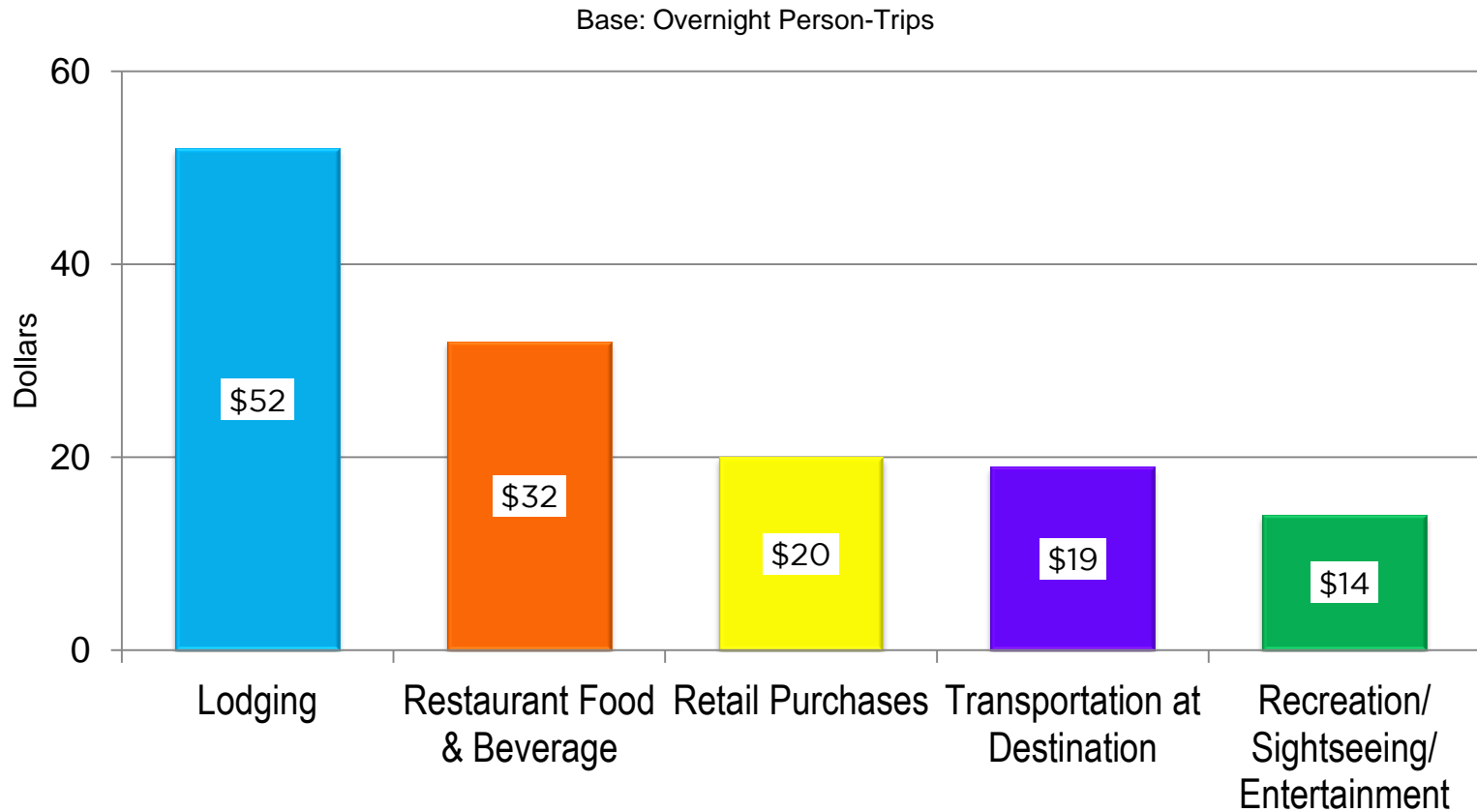
Domestic Overnight Expenditures — by Sector

Total Spending = \$1.9 Billion

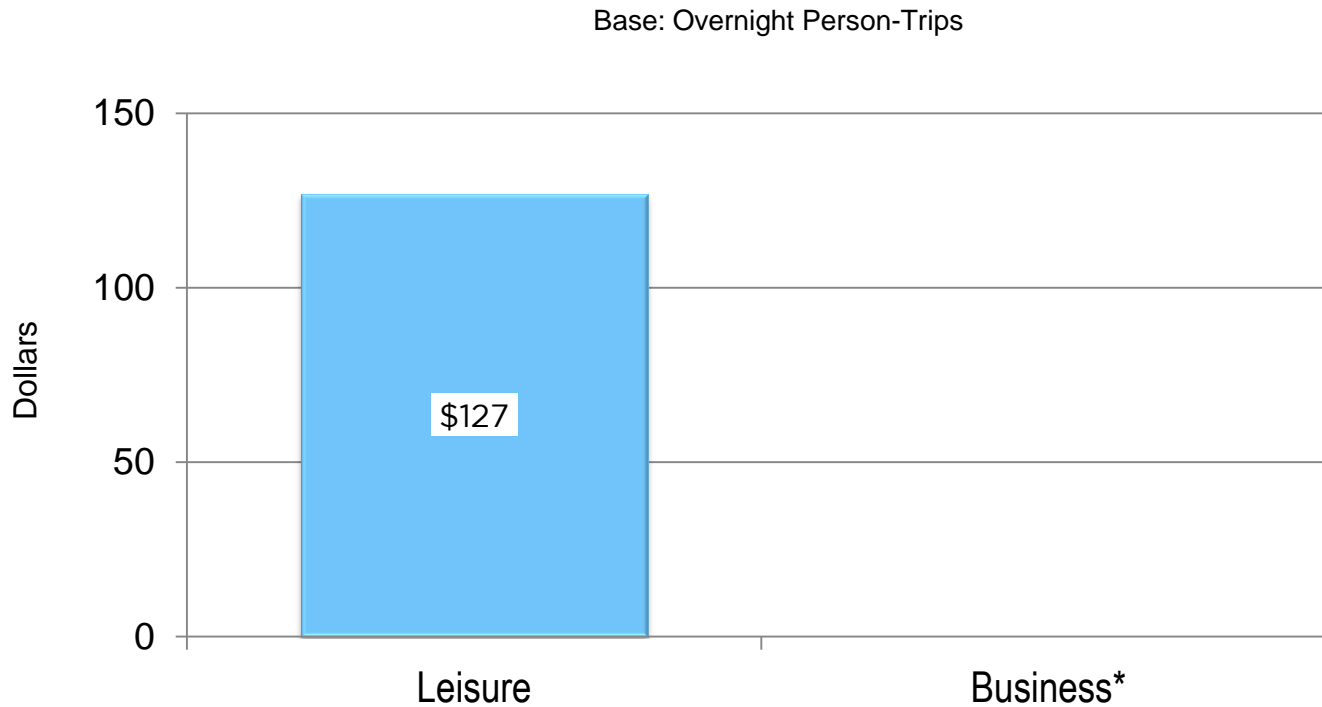
+12.2% vs. 2015



Average Per Person Expenditures on Domestic Overnight Trips — By Sector

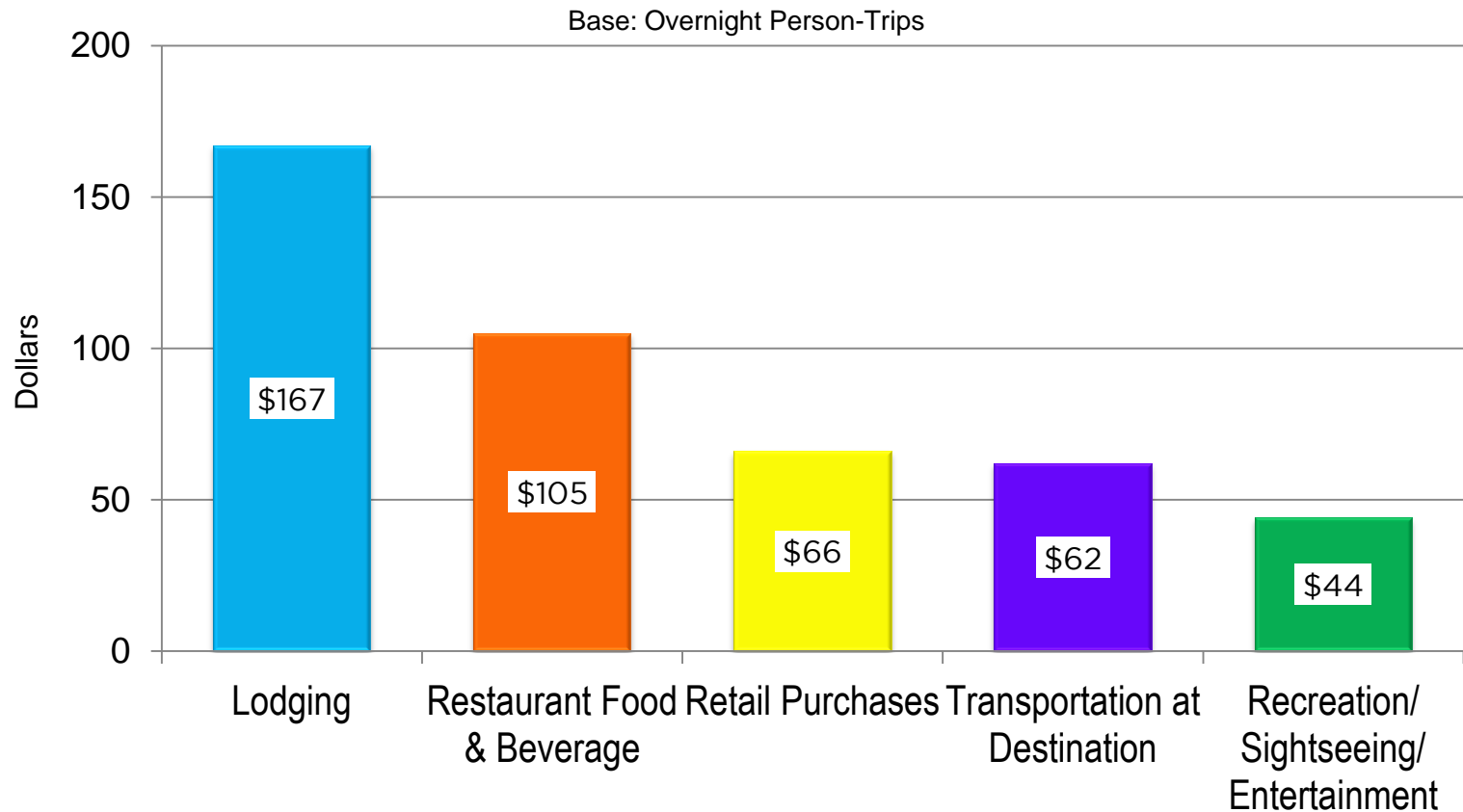


Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose



* Low base sizes

Average Per Party Expenditures on Domestic Overnight Trips — By Sector



Average Per Party Expenditures on Domestic Overnight Trips — by Trip Purpose



* Low base sizes

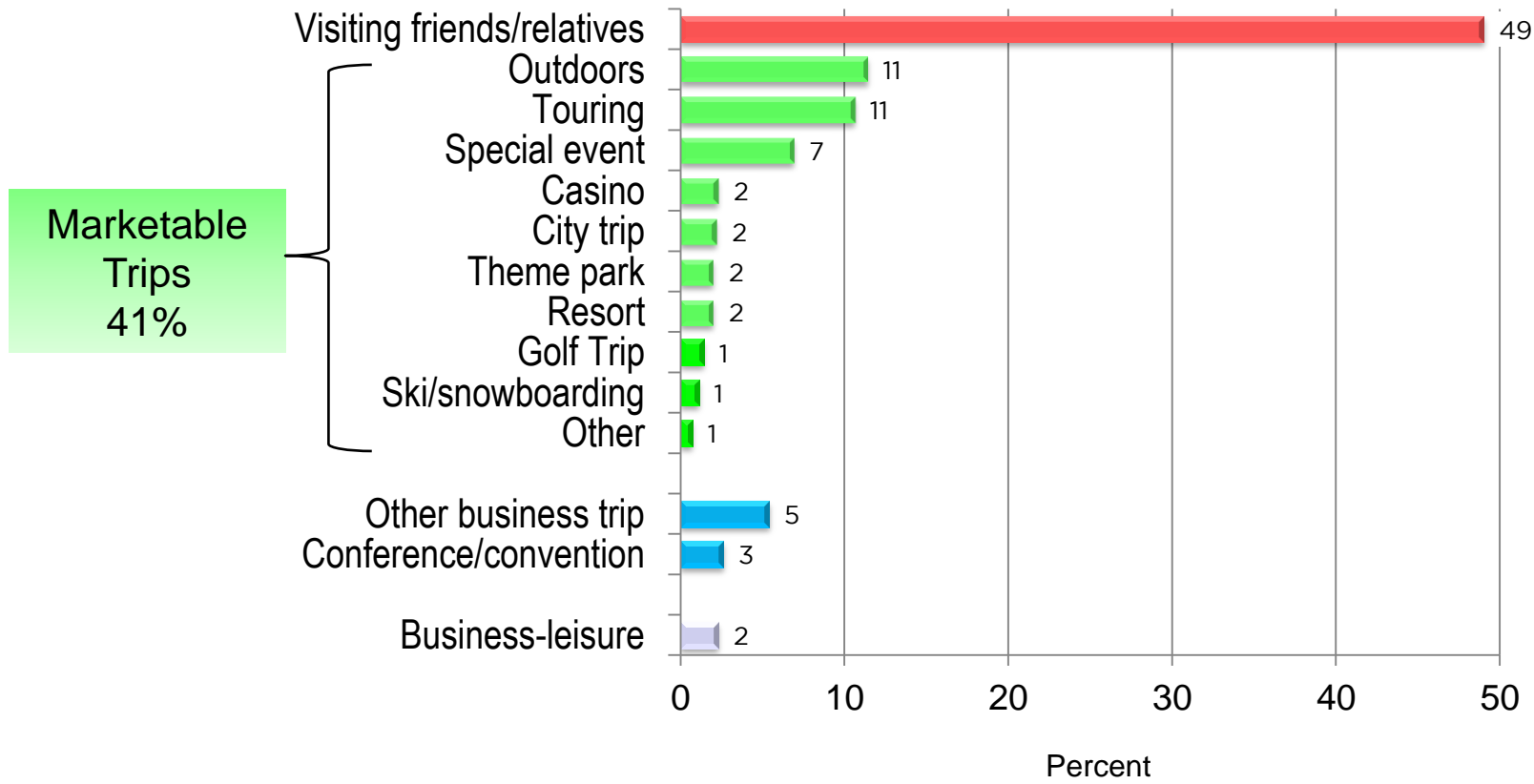


Overnight Trip Characteristics



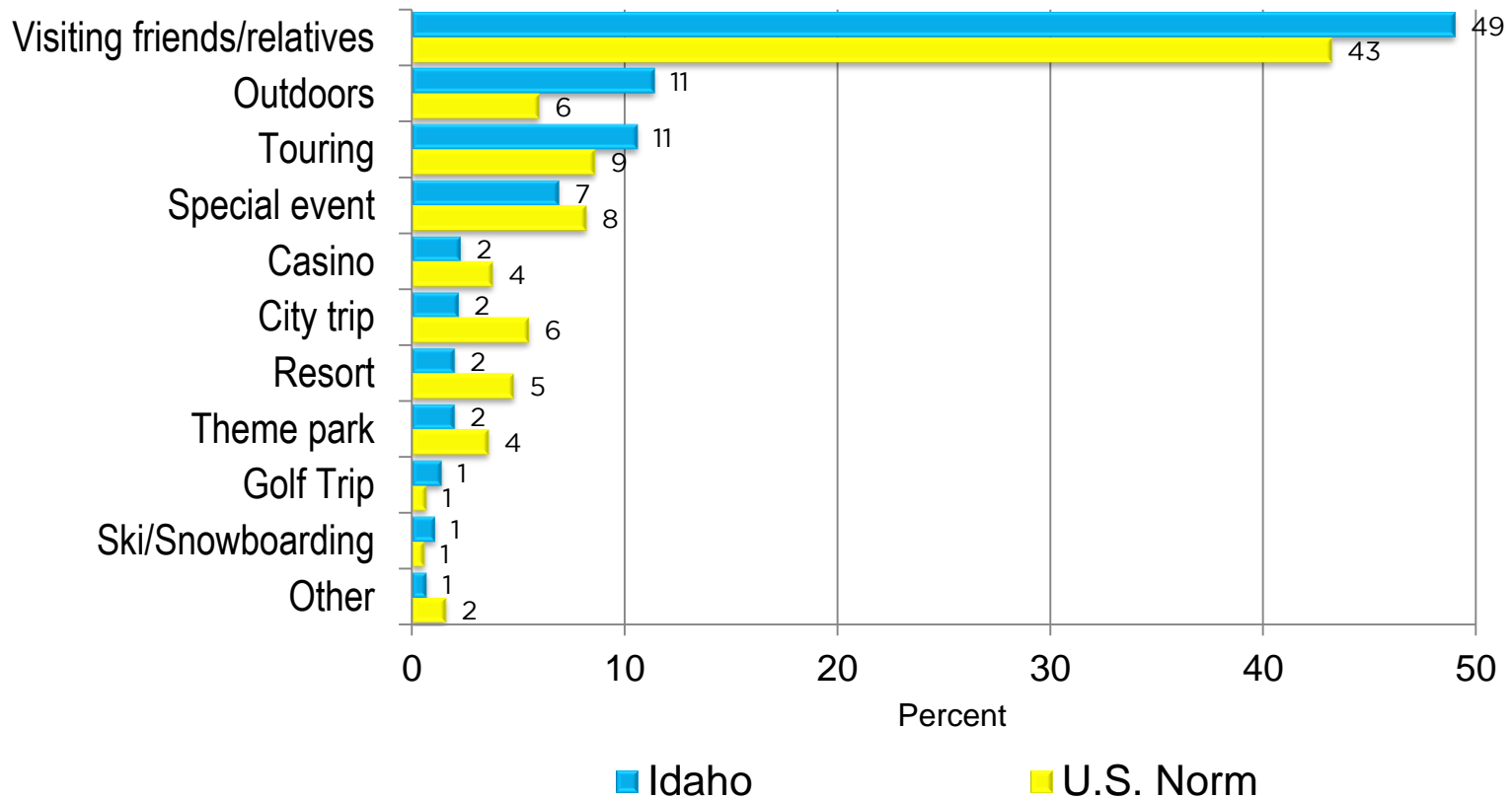
Main Purpose of Trip

Base: Overnight Person-Trips

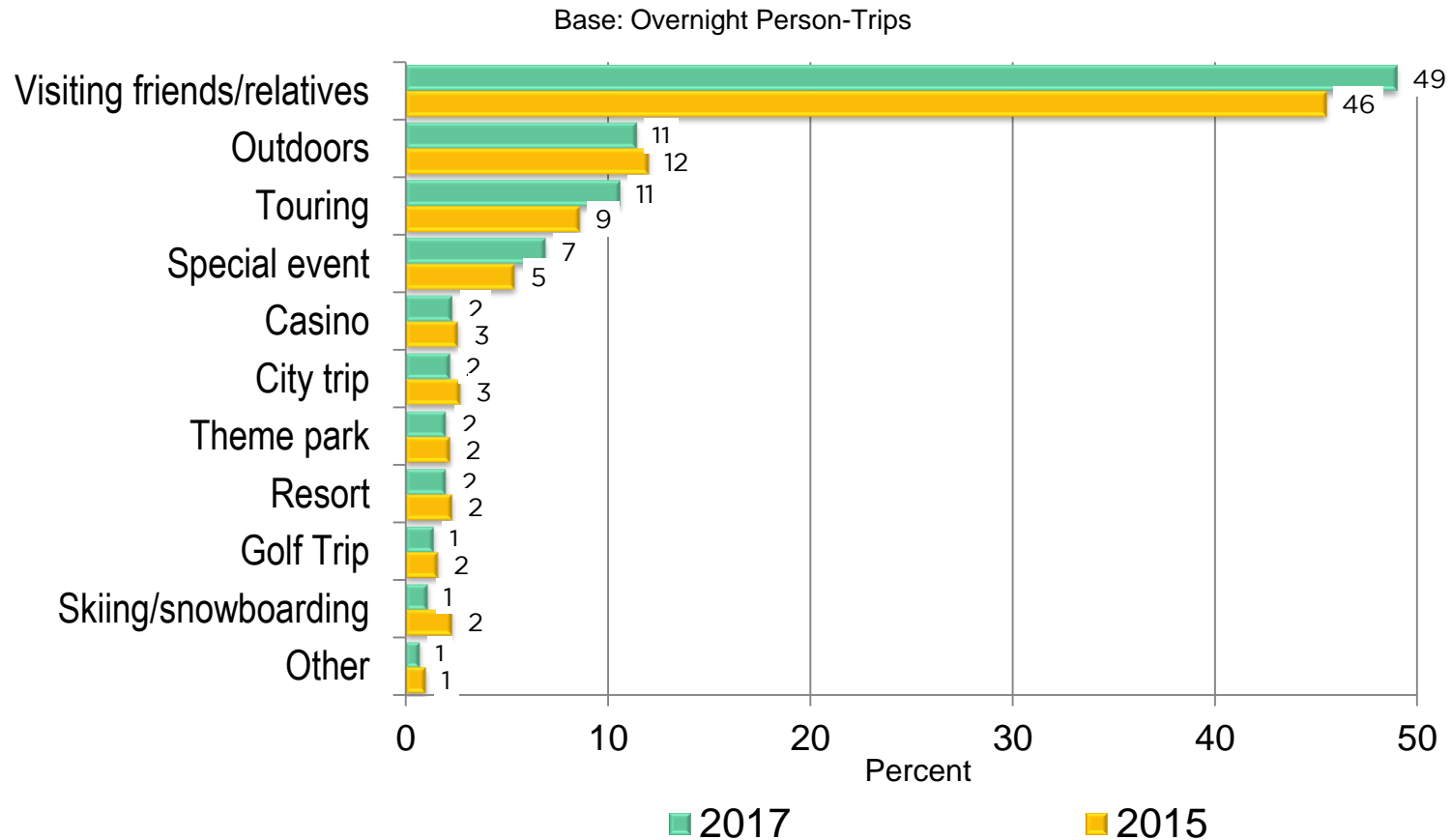


Main Purpose of Leisure Trip

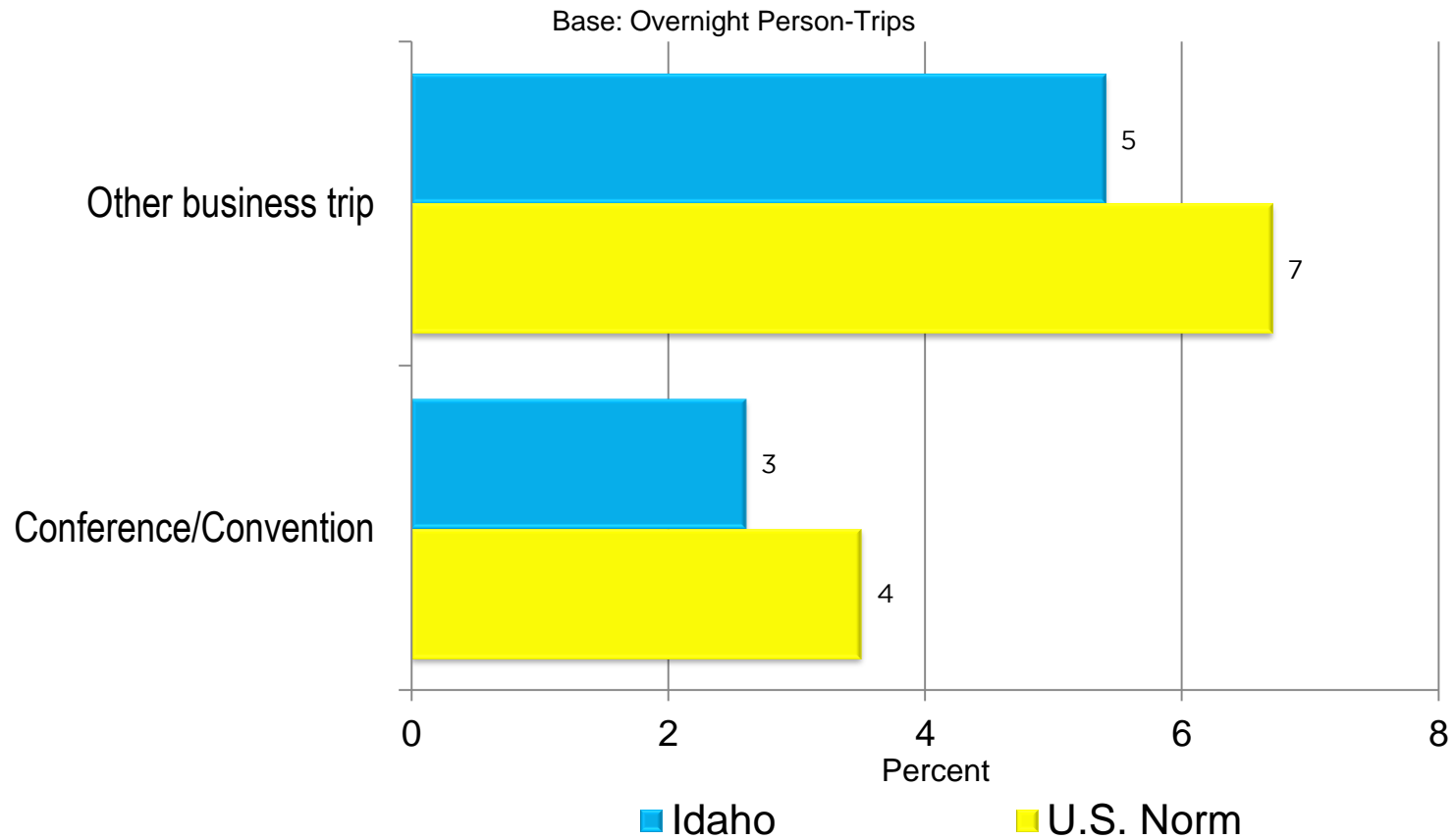
Base: Overnight Person-Trips



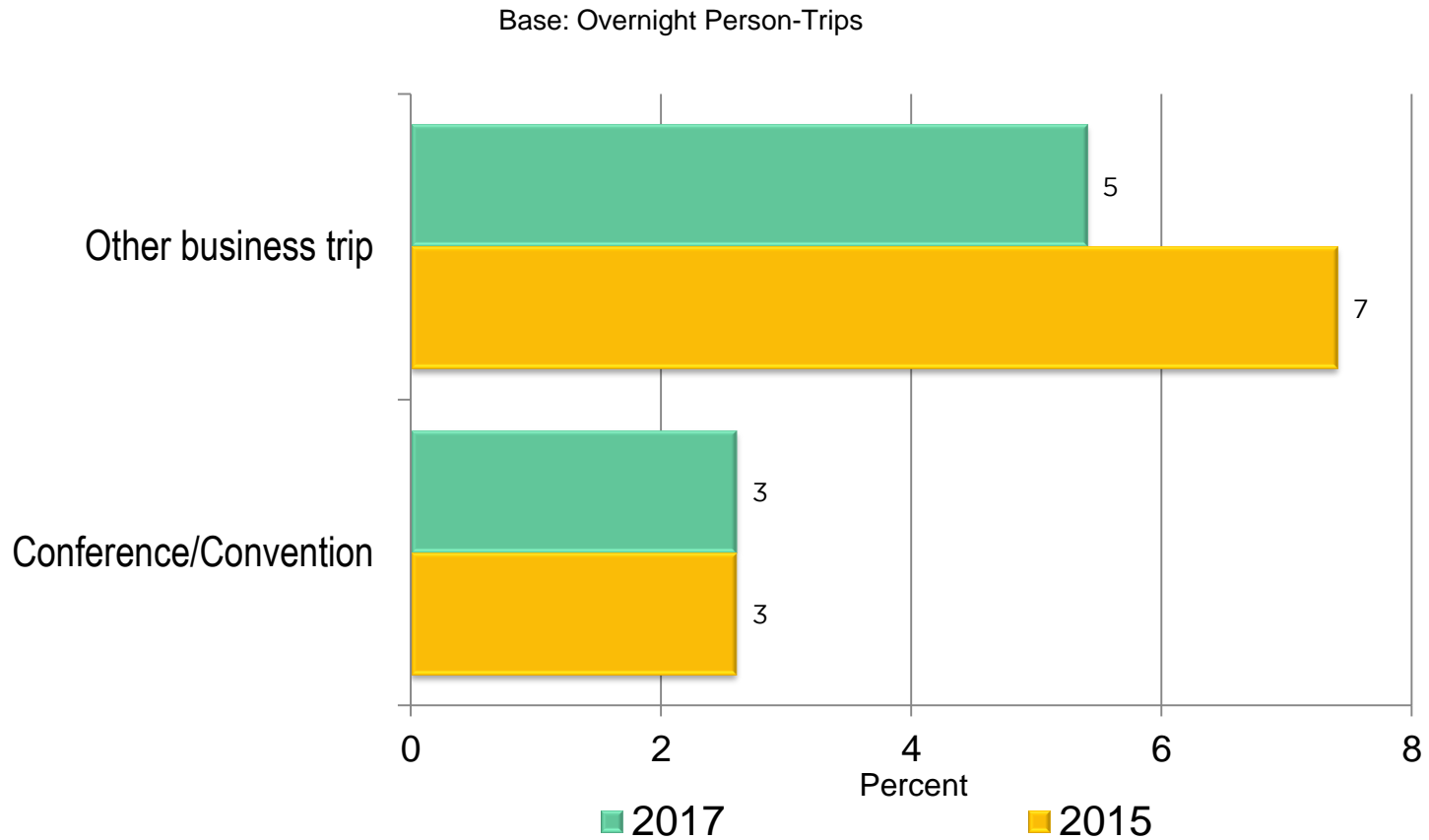
Main Purpose of Overnight Leisure Trip — 2017 vs. 2015



Main Purpose of Business Trip

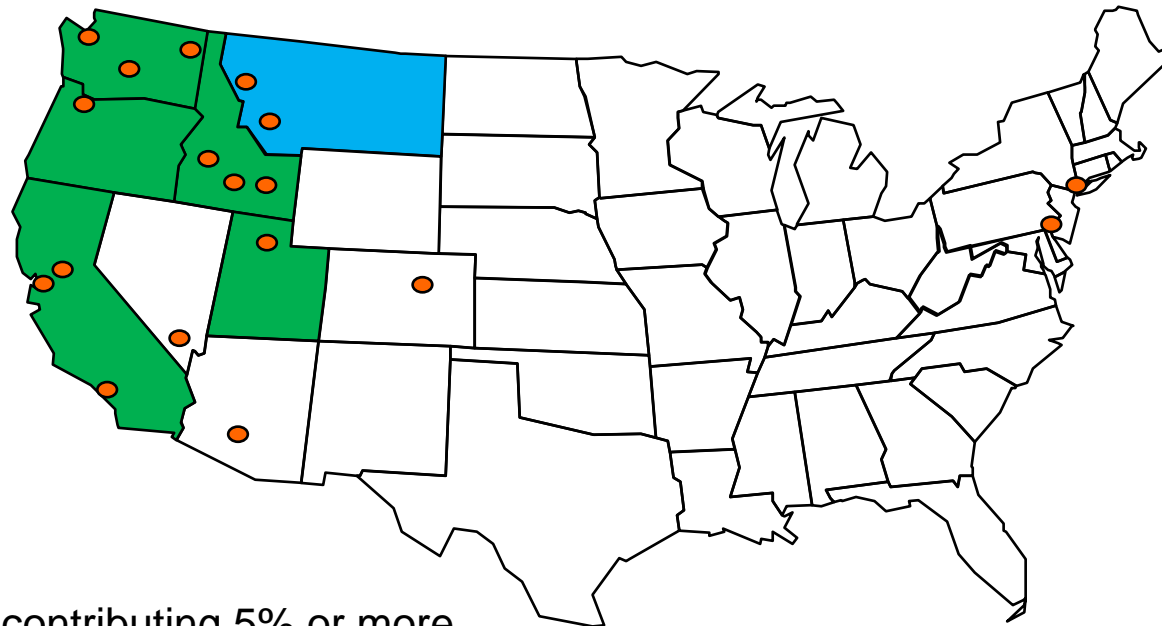


Main Purpose of Overnight Business Trip — 2017 vs. 2015



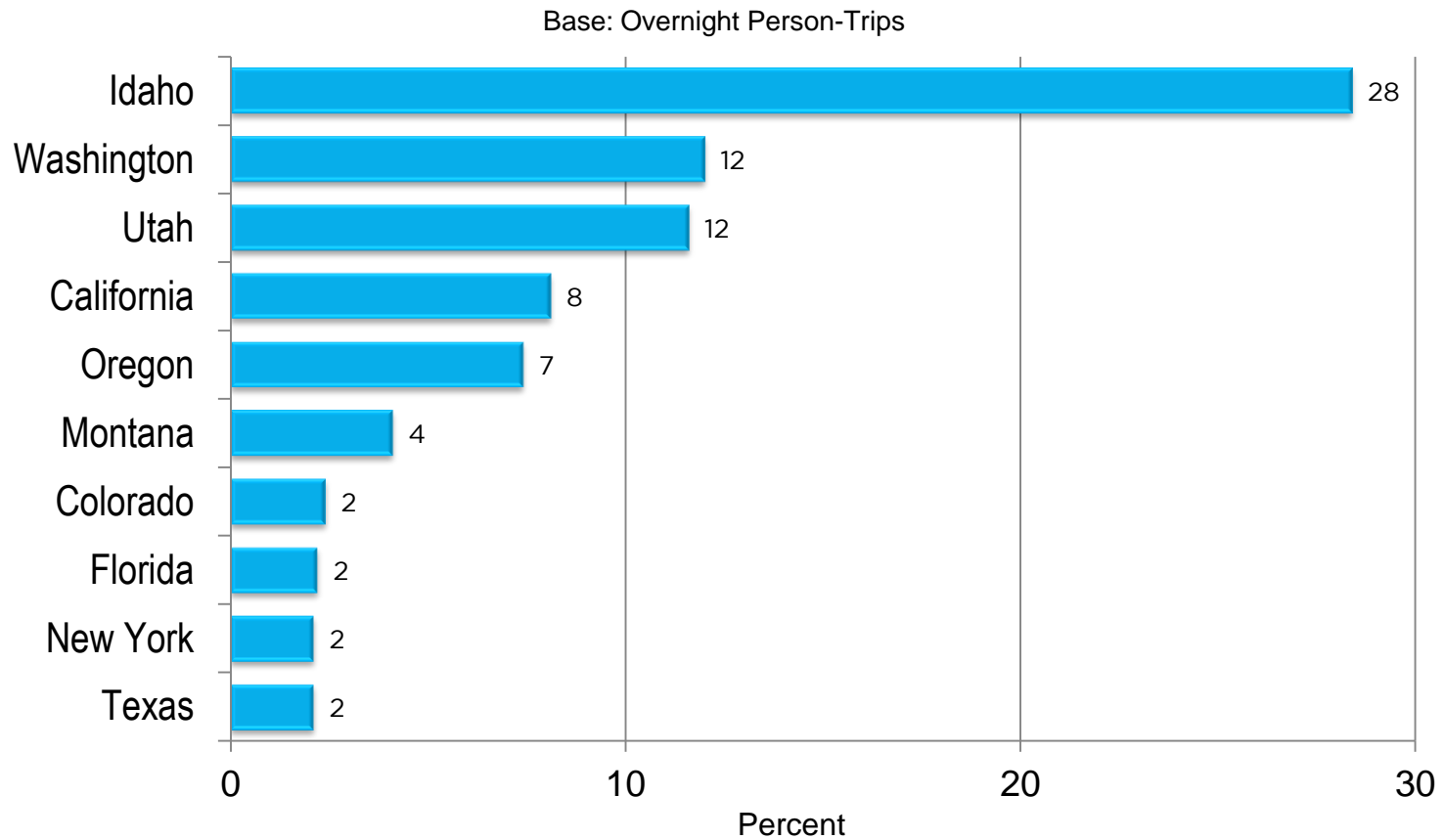
Sources of Business

Base: Overnight Person-Trips

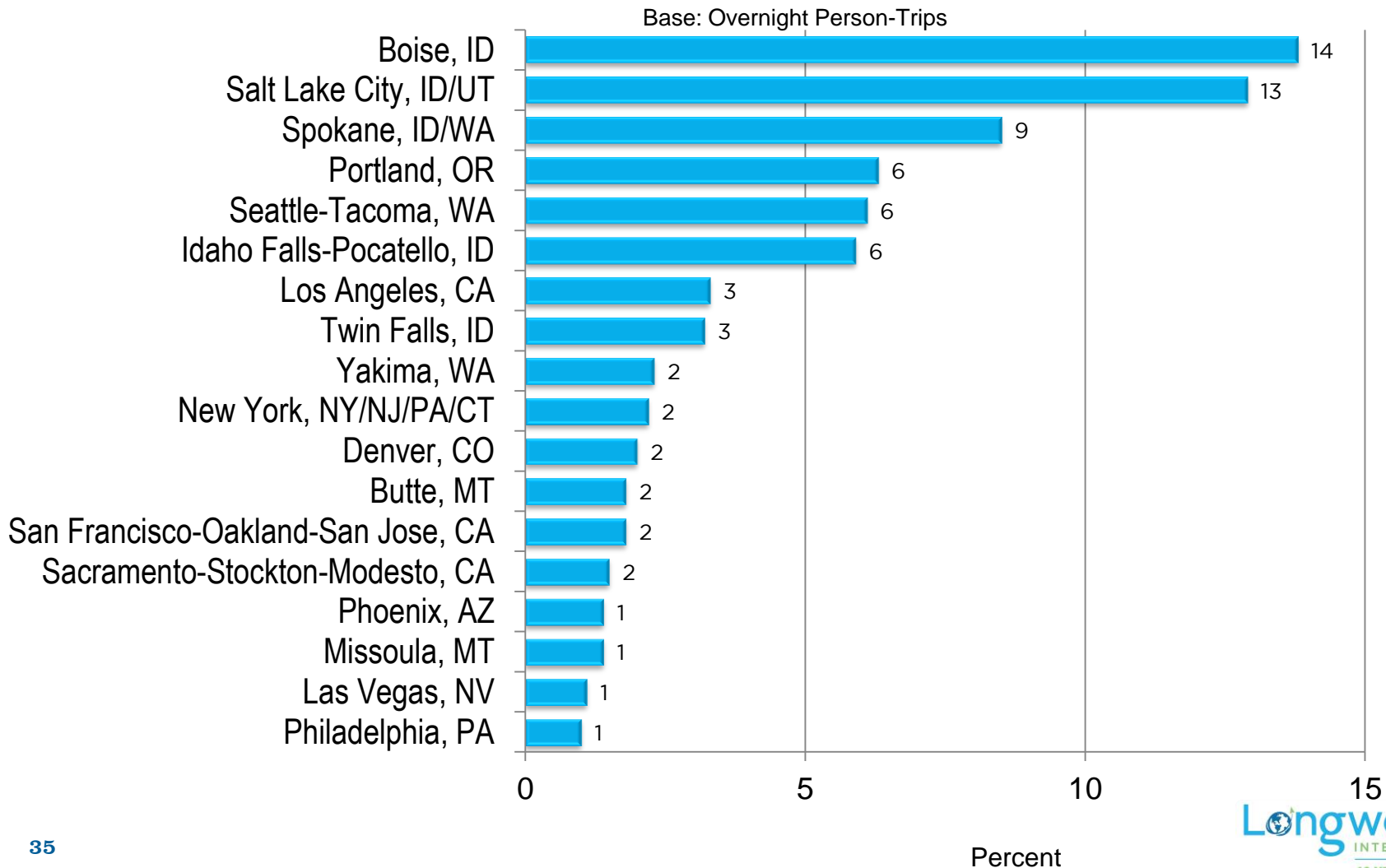


- States contributing 5% or more
- States contributing 3% - 5%
- DMA's contributing more than 2%

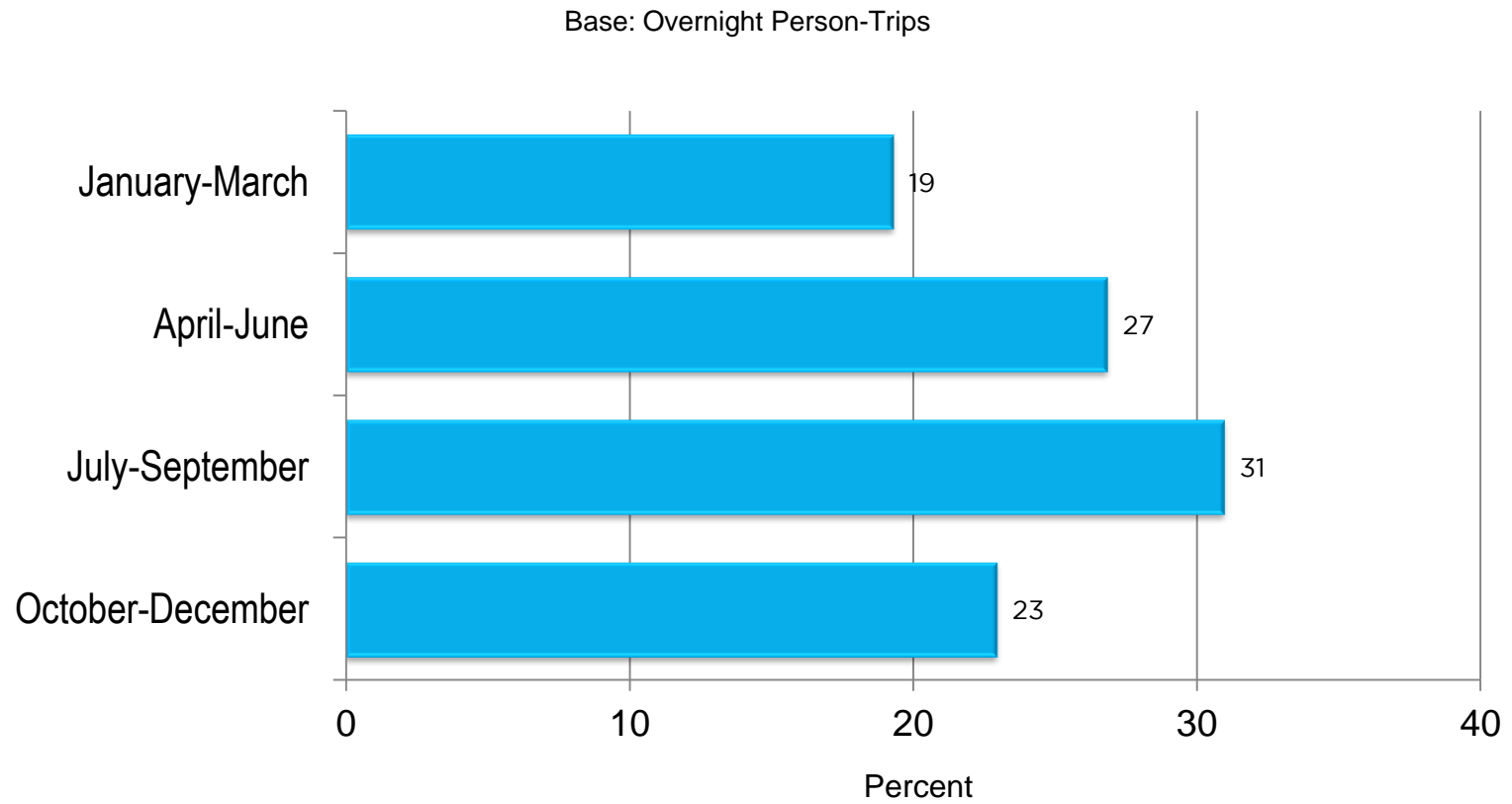
State Origin Of Trip



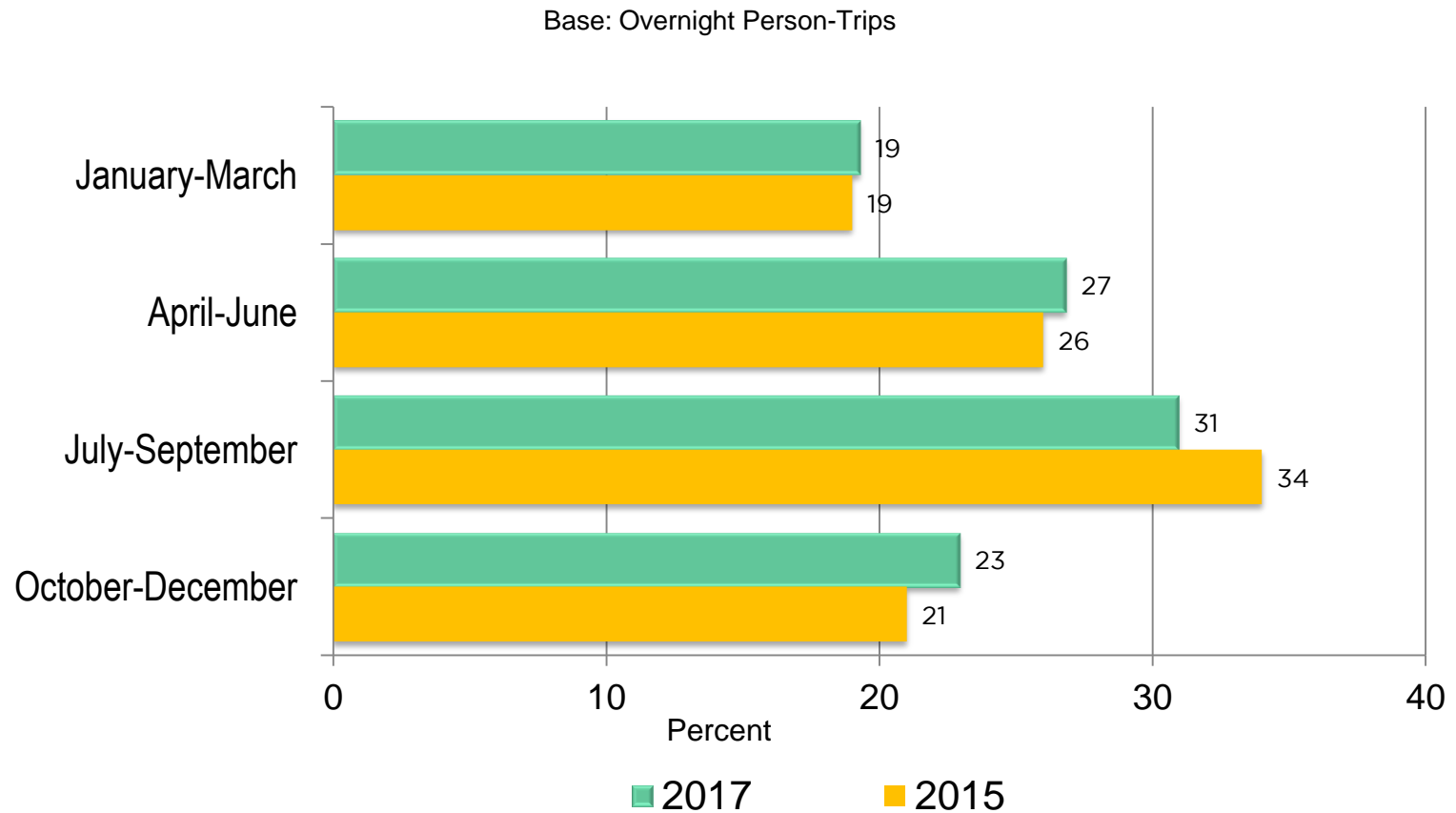
DMA Origin Of Trip



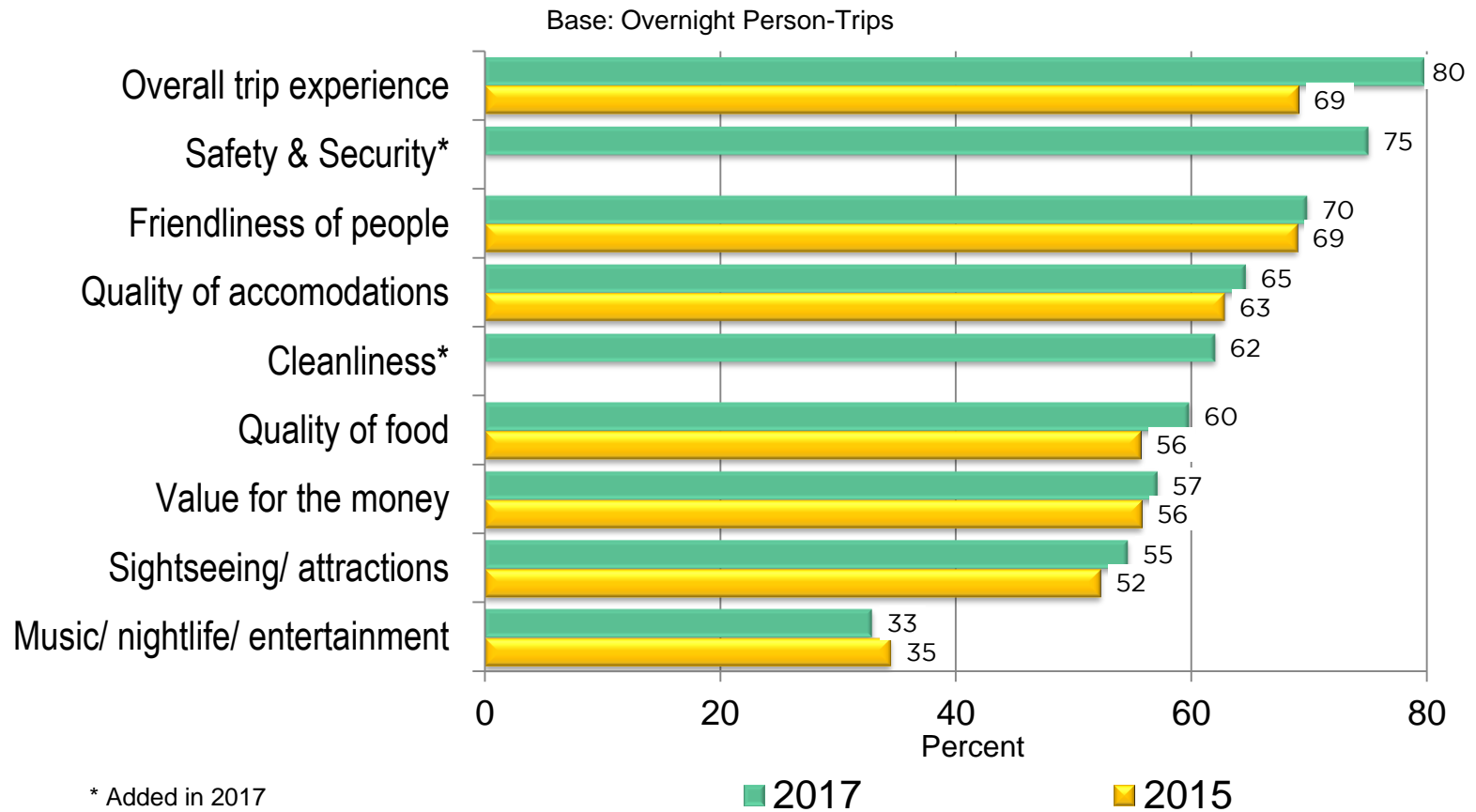
Season of Trip



Season of Trip– 2015 vs. 2017

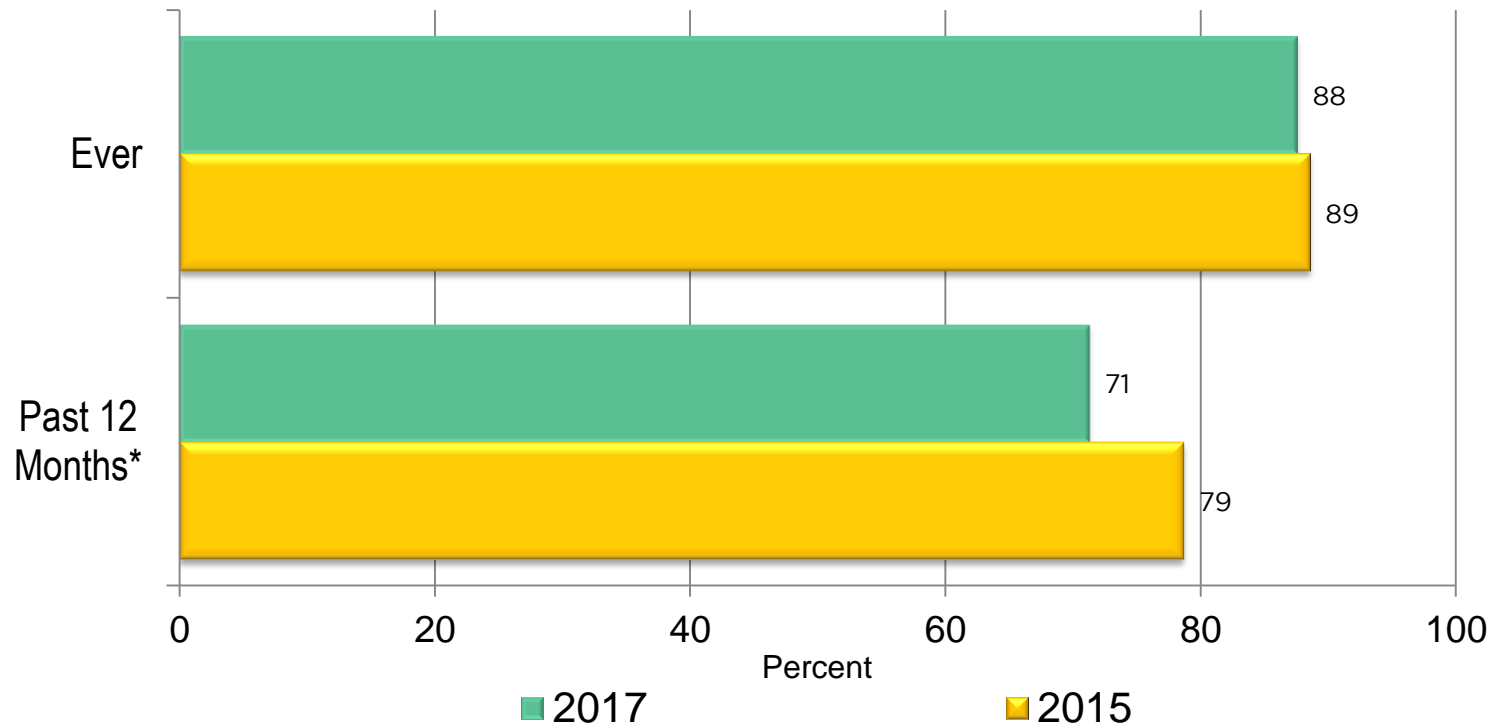


% Very Satisfied with Trip



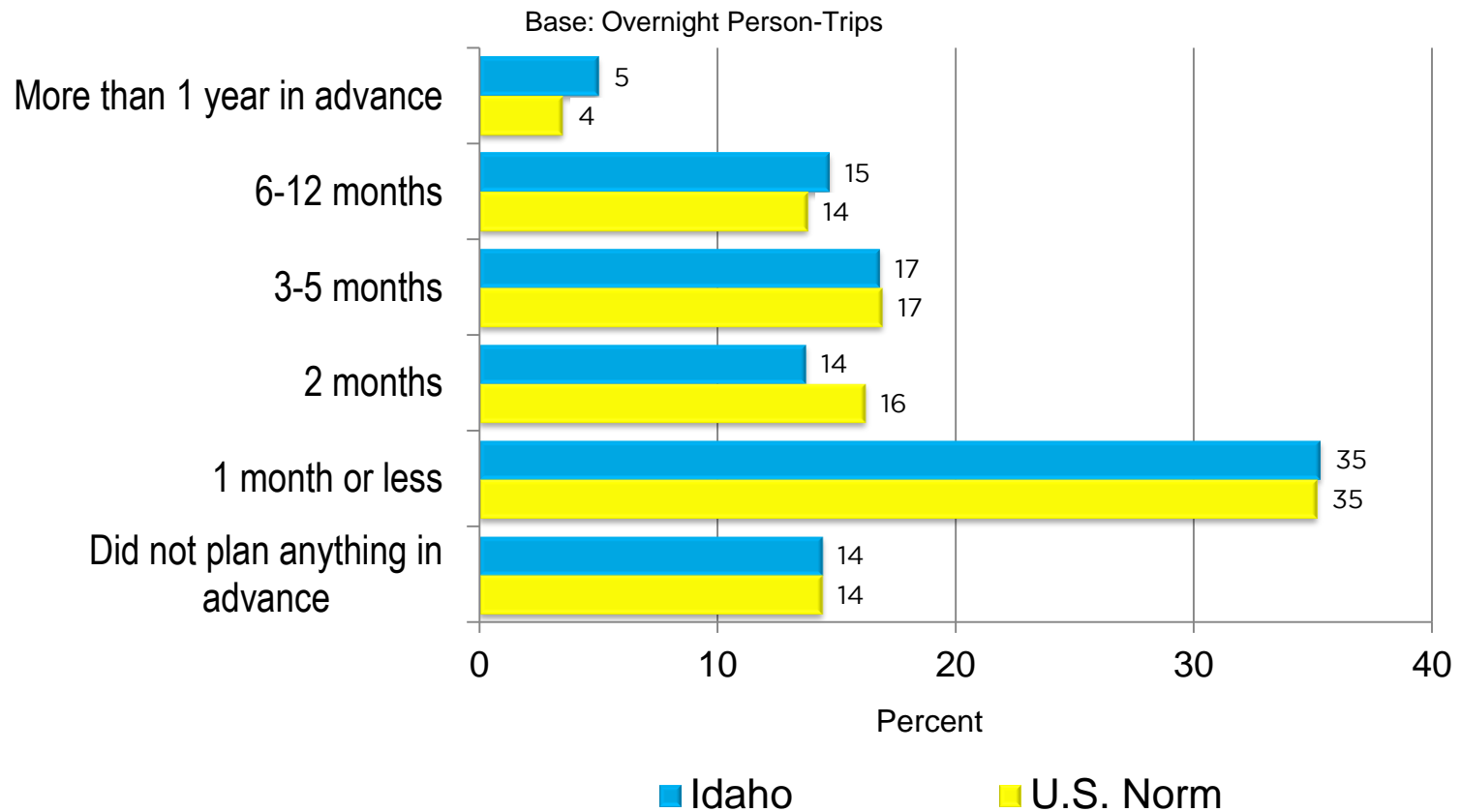
Past Visitation to Idaho

Base: Overnight Person-Trips



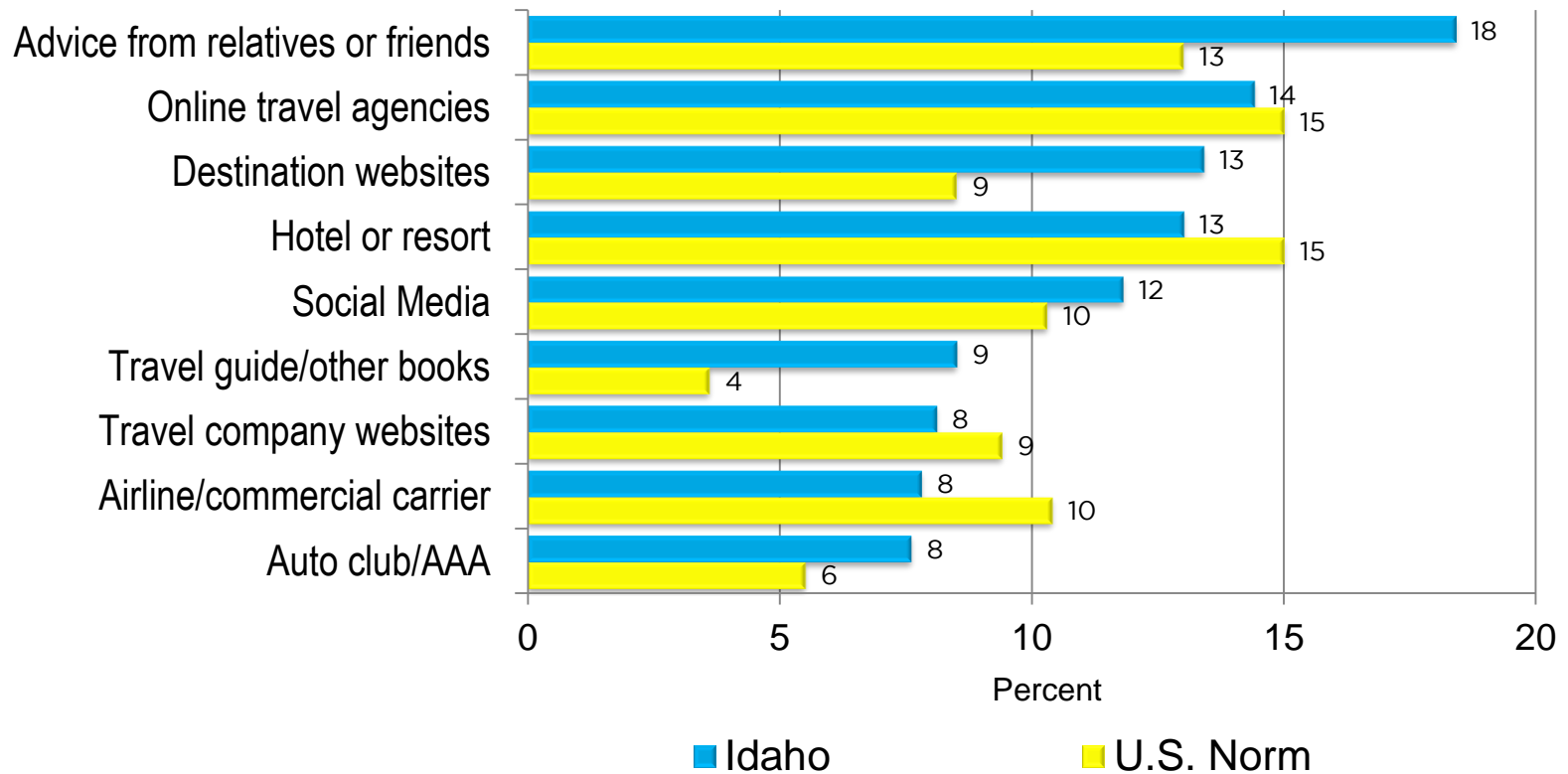
* Question wording changed in 2017

Length of Trip Planning



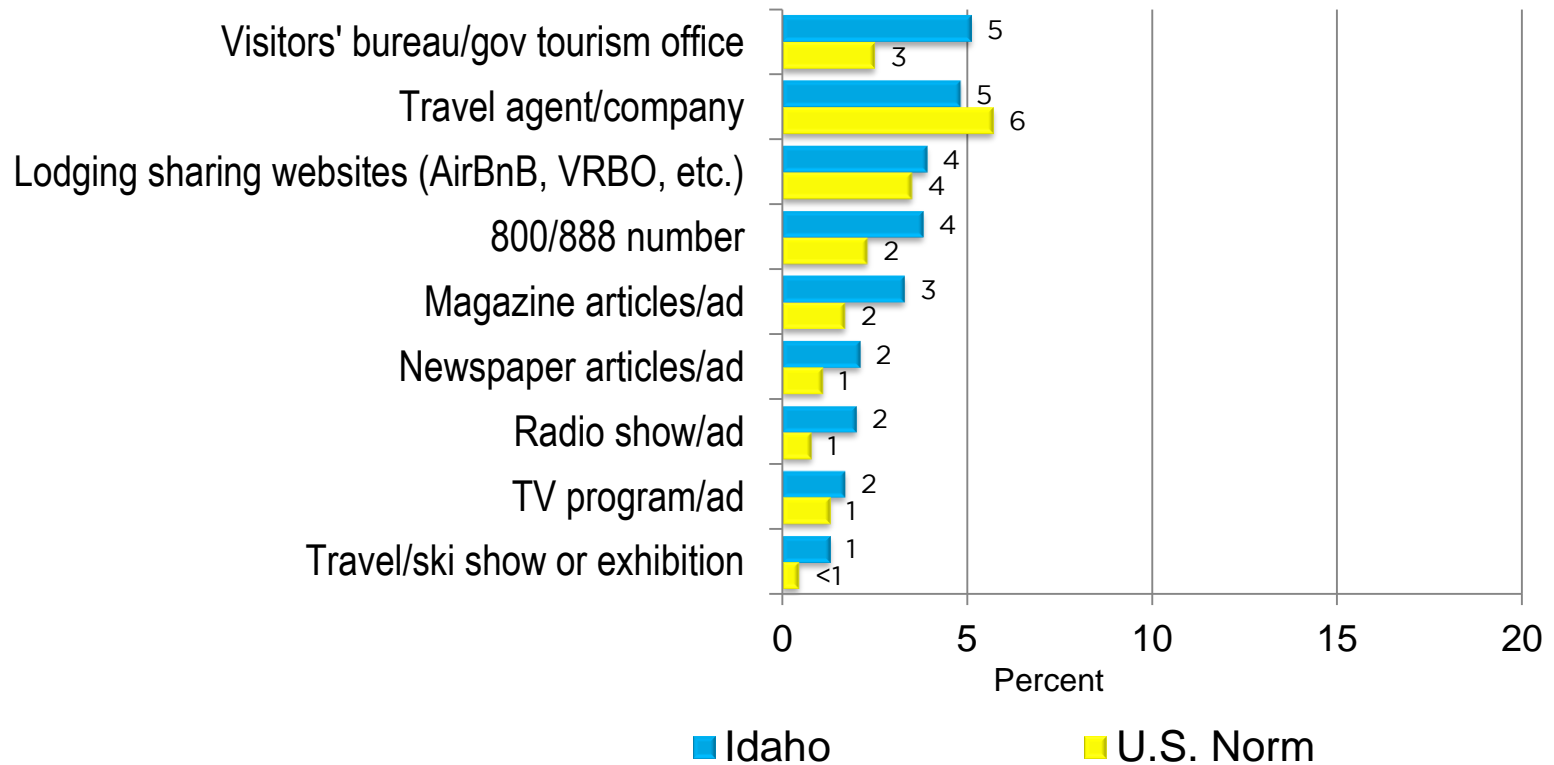
Trip Planning Information Sources

Base: Overnight Person-Trips



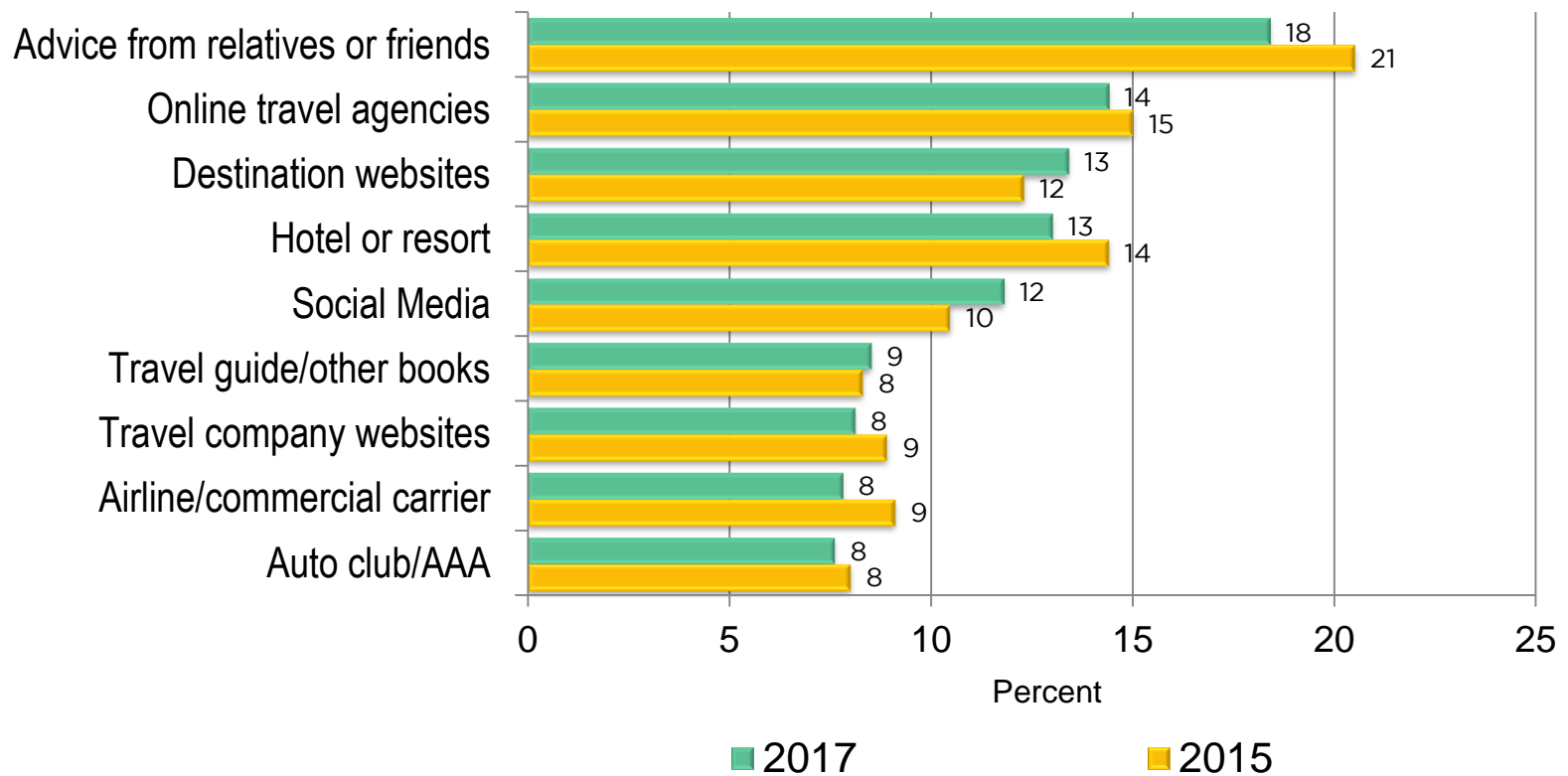
Trip Planning Information Sources (Cont'd)

Base: Overnight Person-Trips

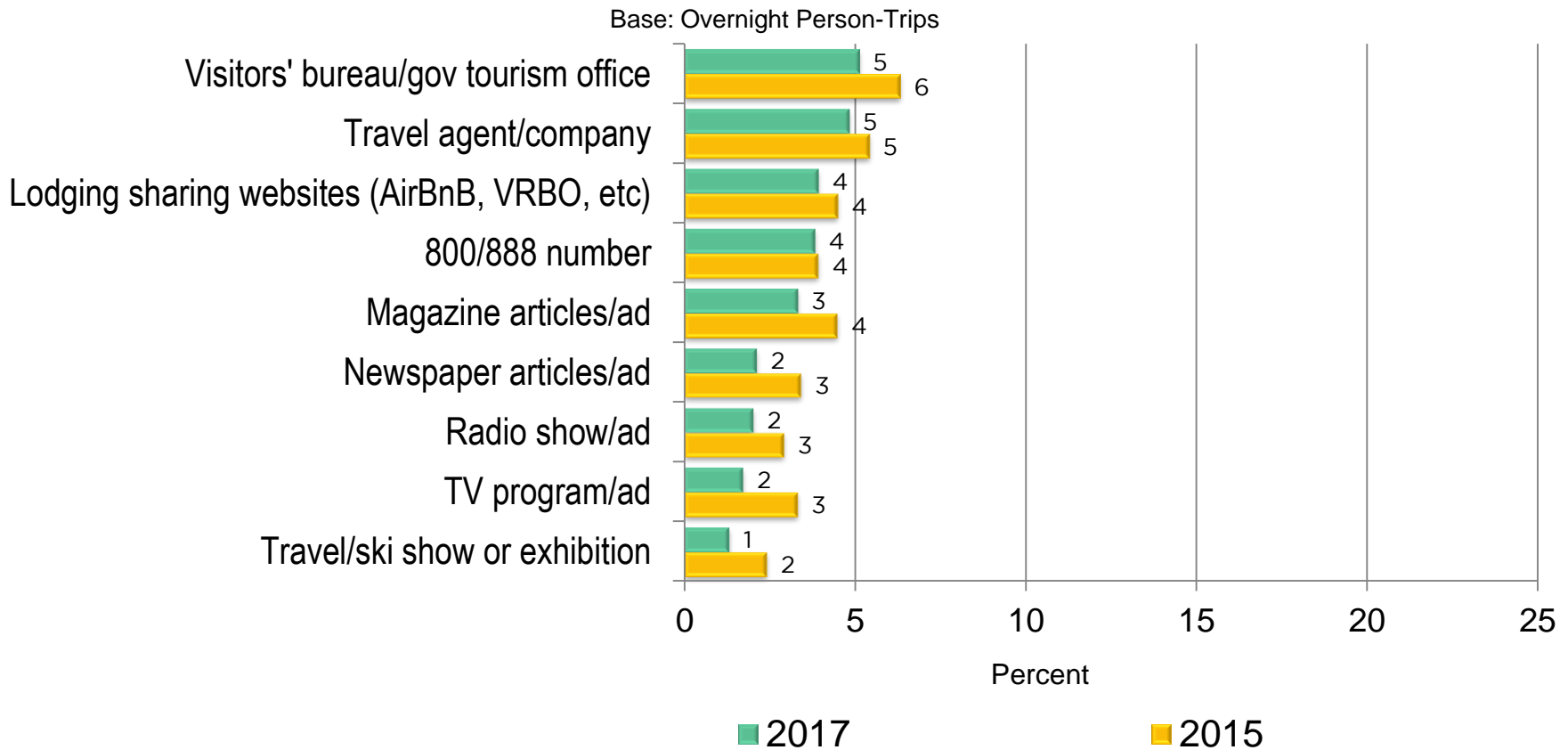


Trip Planning Information Sources 2015 vs. 2017

Base: Overnight Person-Trips

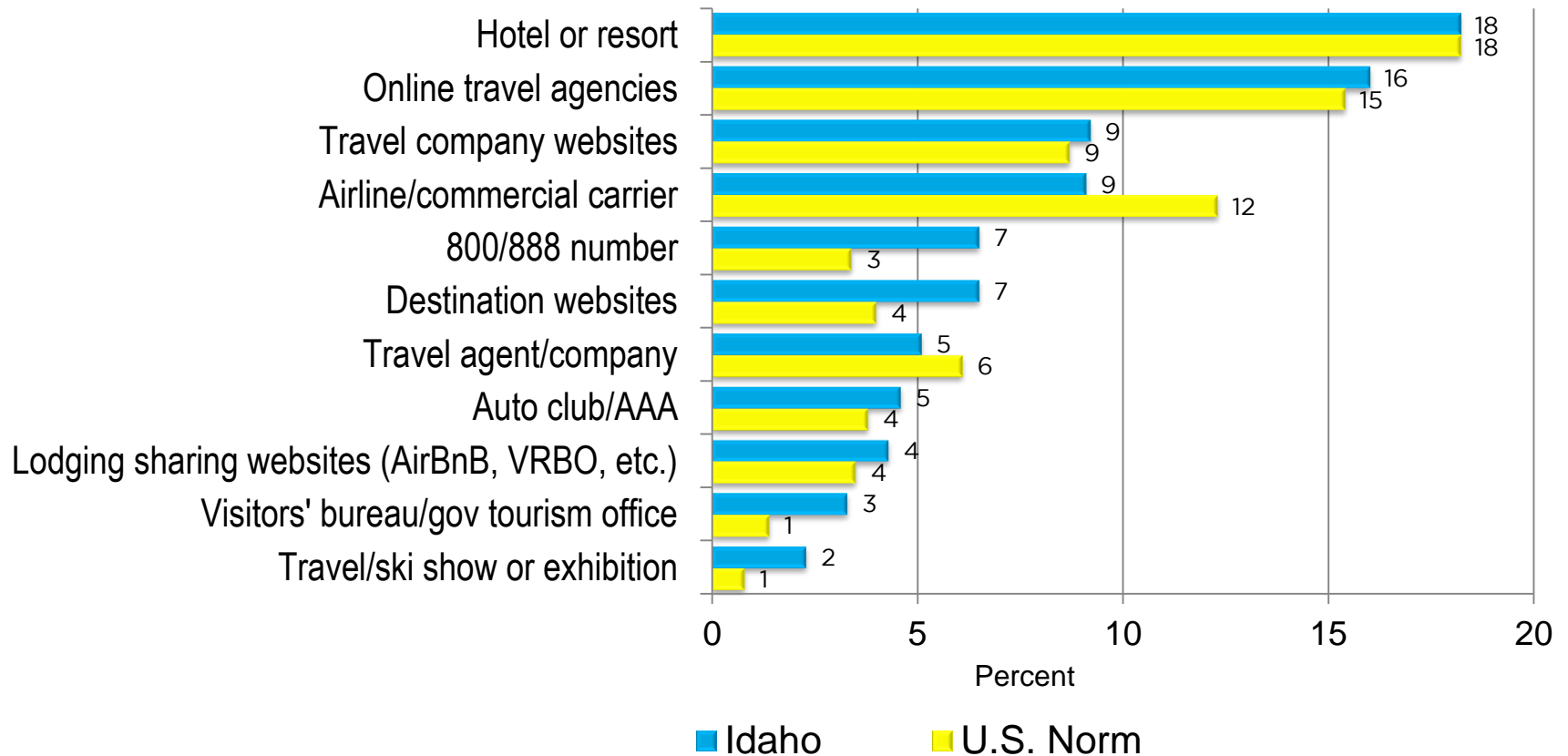


Trip Planning Information Sources 2015 vs. 2017



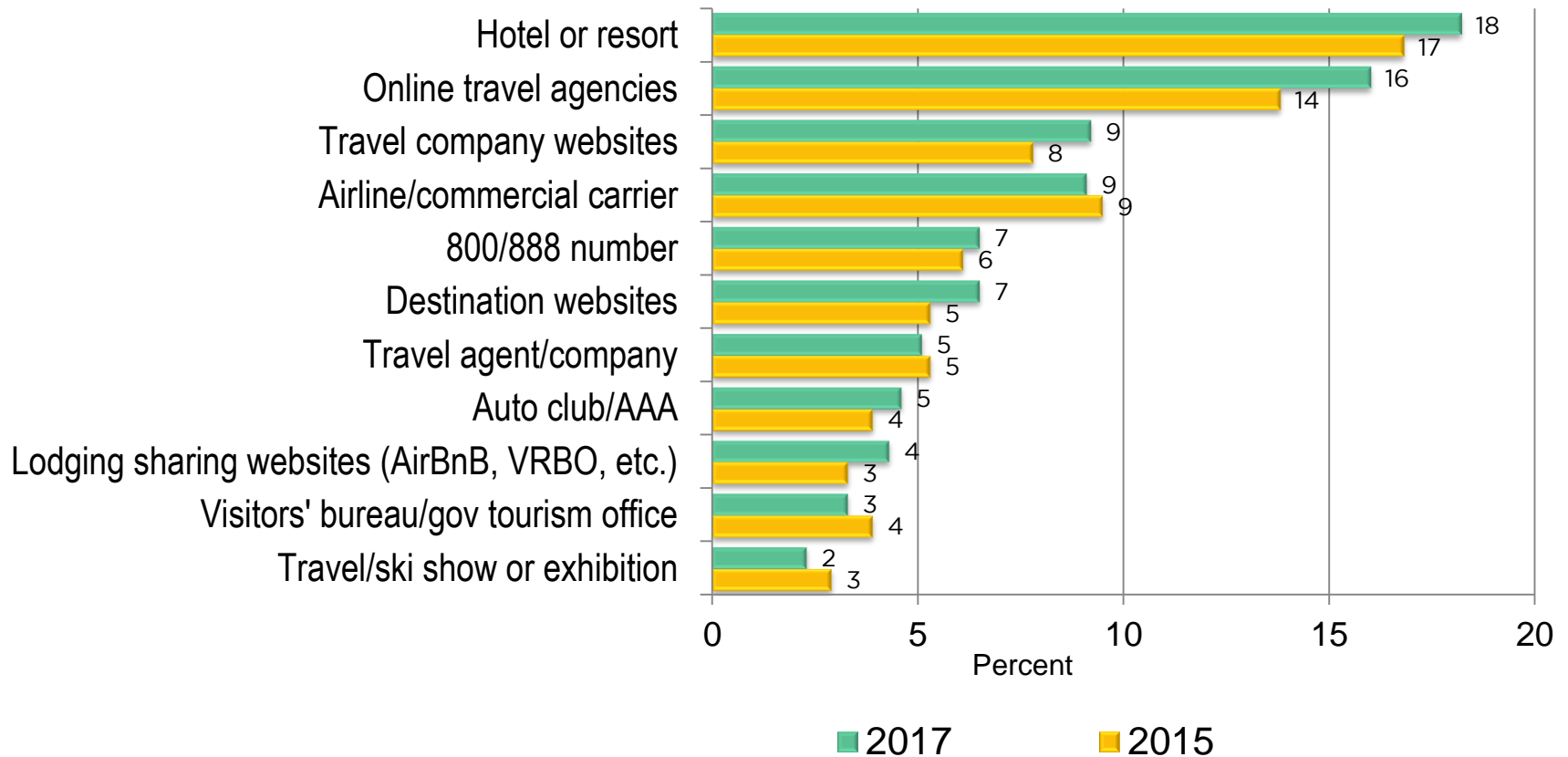
Method of Booking

Base: Overnight Person-Trips

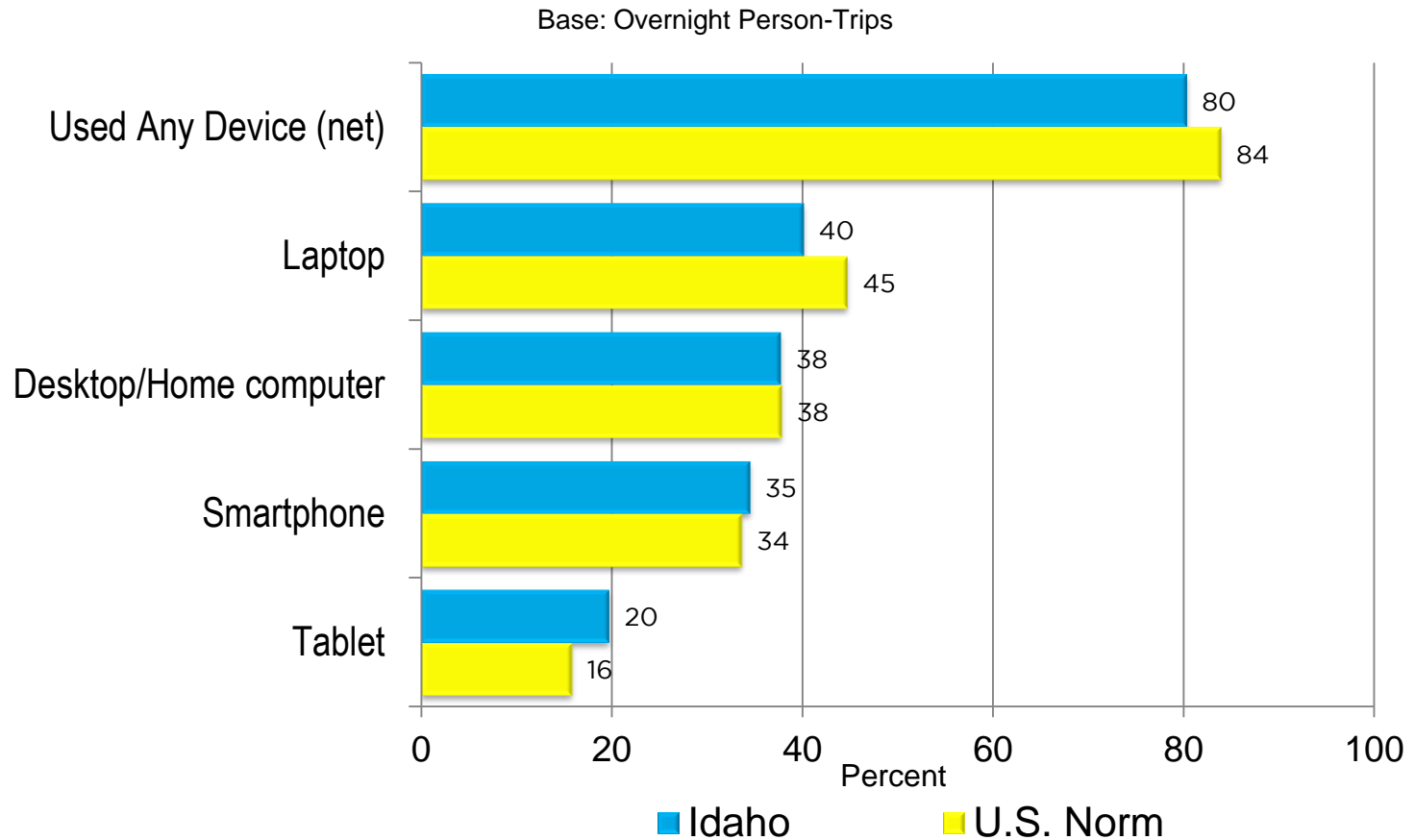


Method of Booking—2015 vs. 2017

Base: Overnight Person-Trips

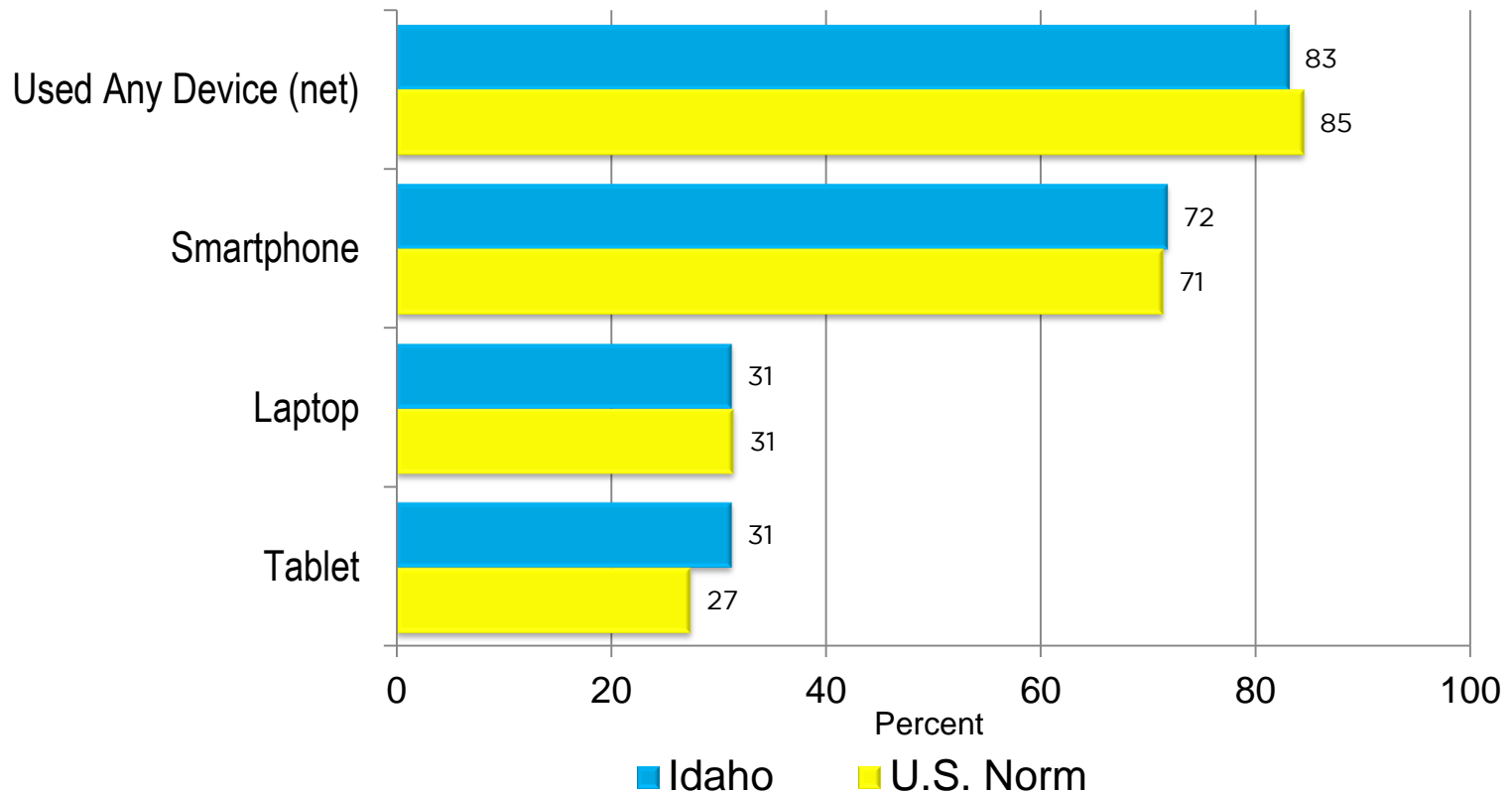


Devices Used for Trip Planning



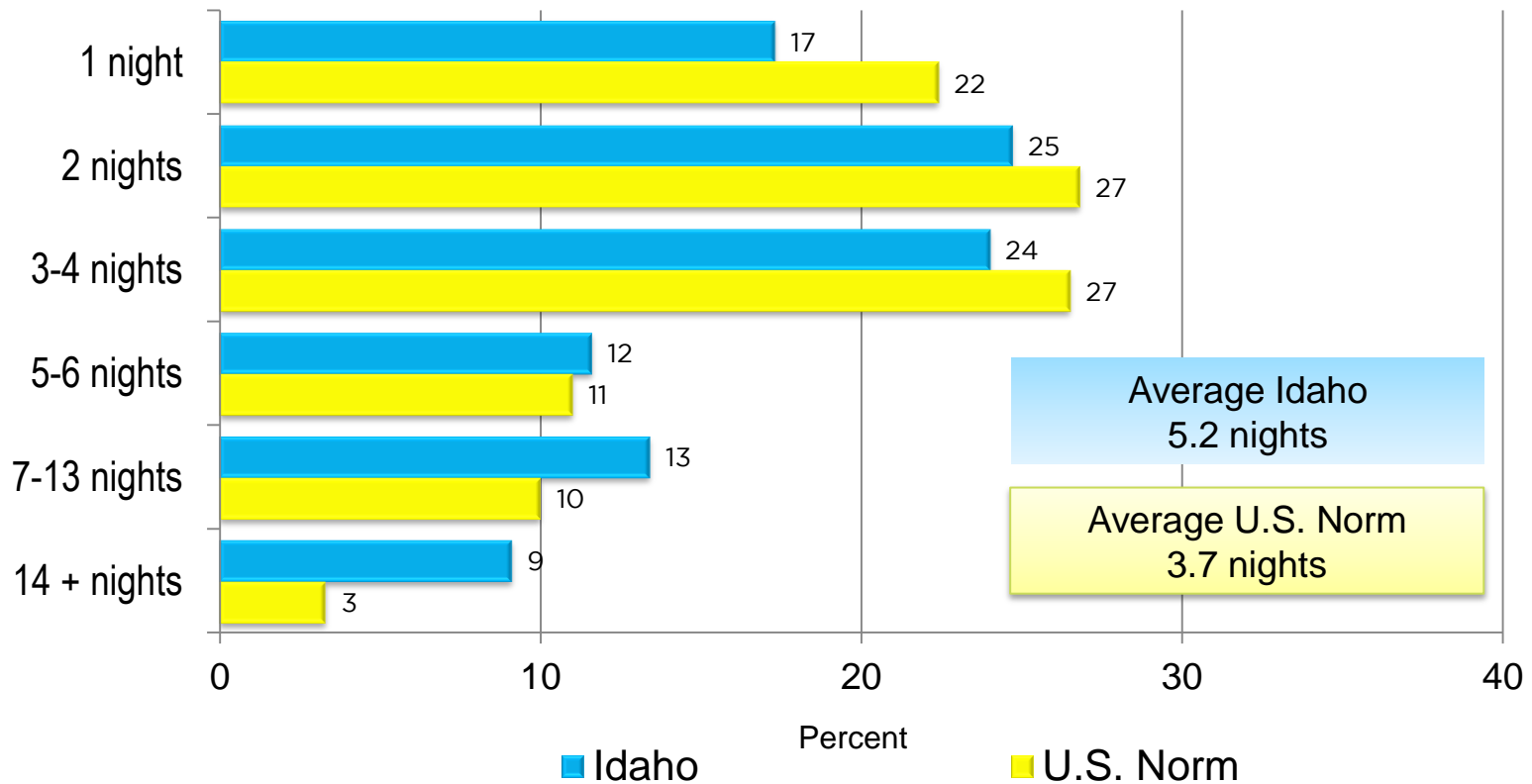
Devices Used During Trip

Base: Overnight Person-Trips



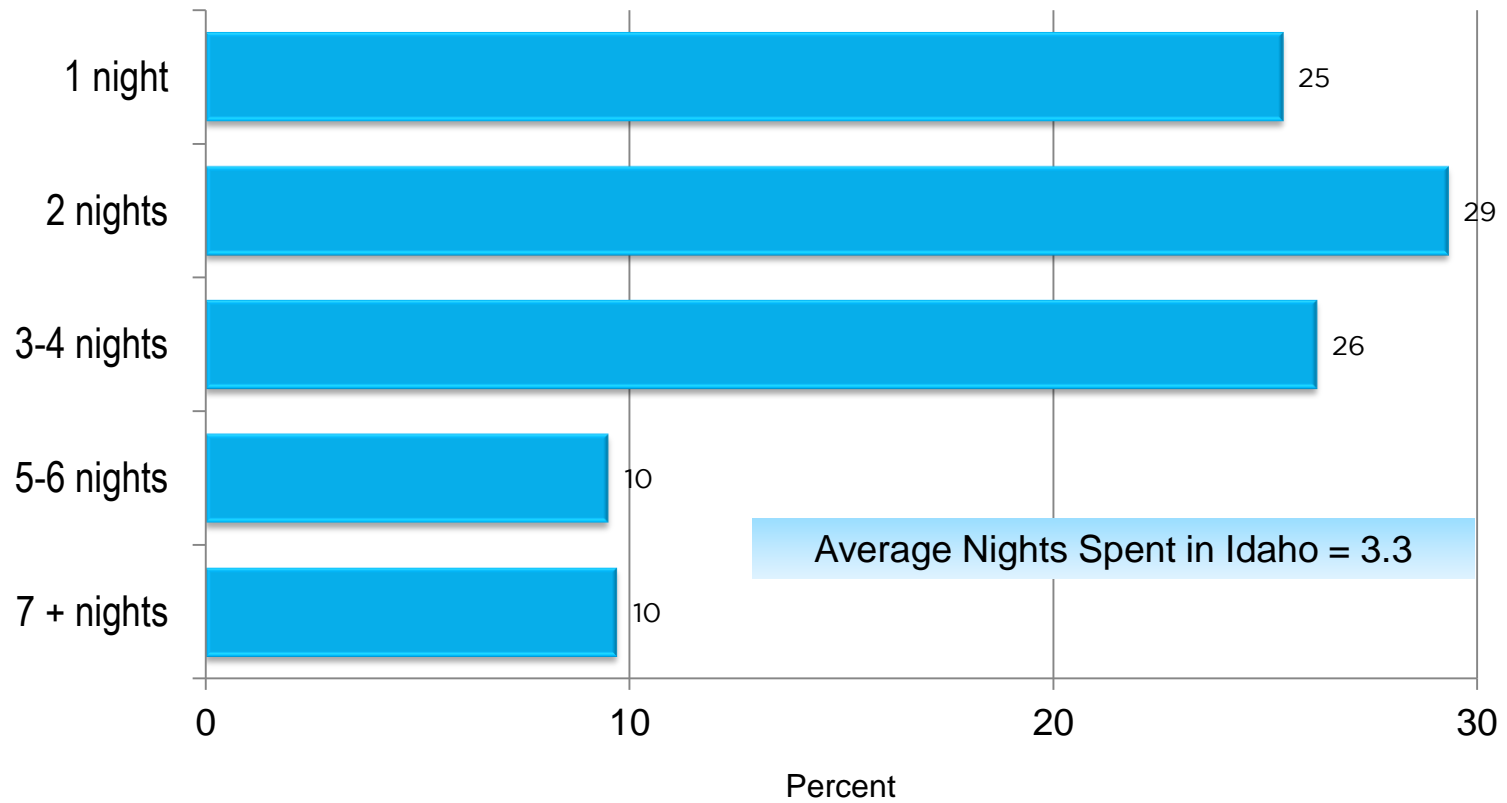
Total Nights Away on Trip

Base: Overnight Person-Trips

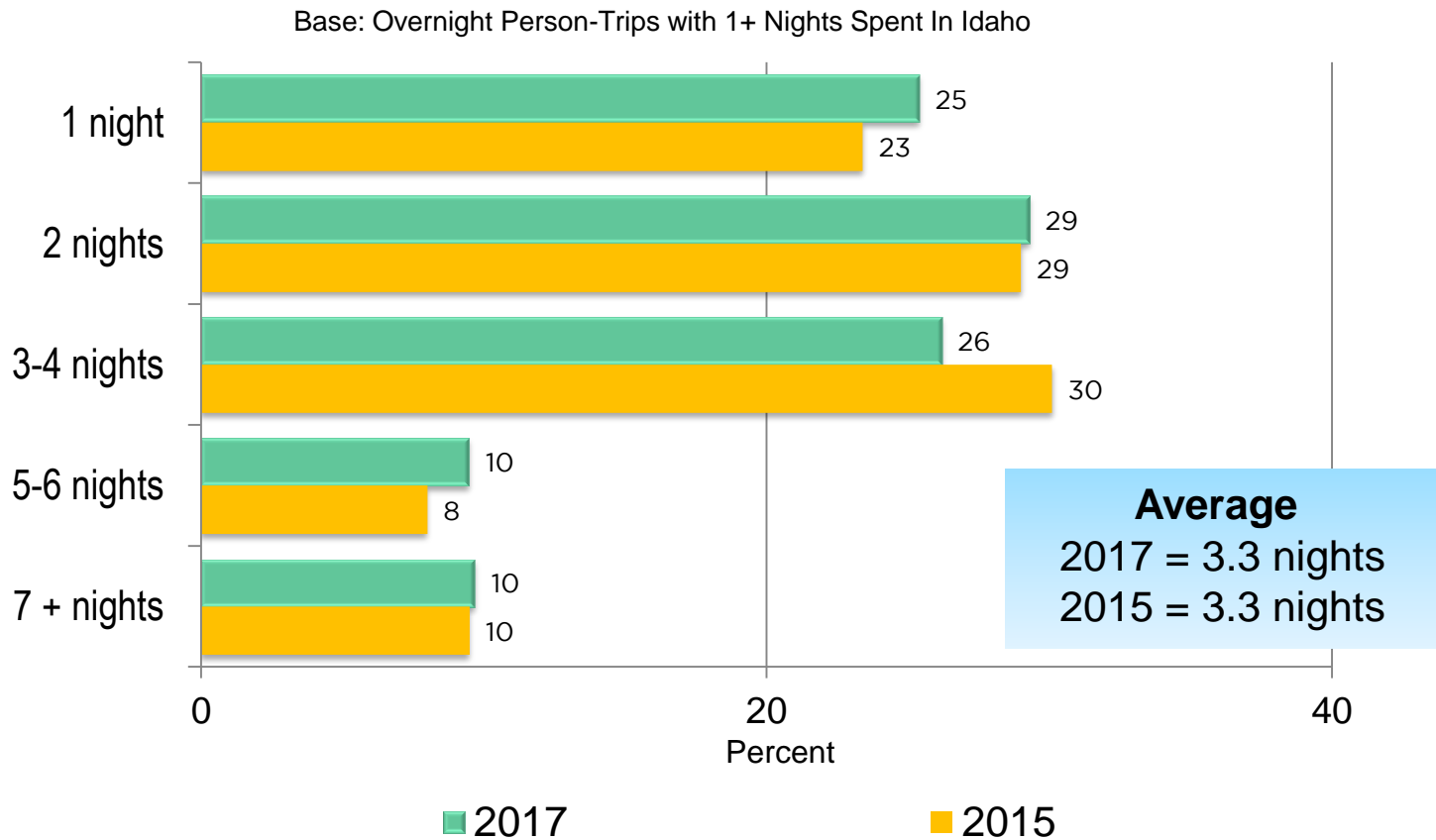


Number of Nights Spent in Idaho

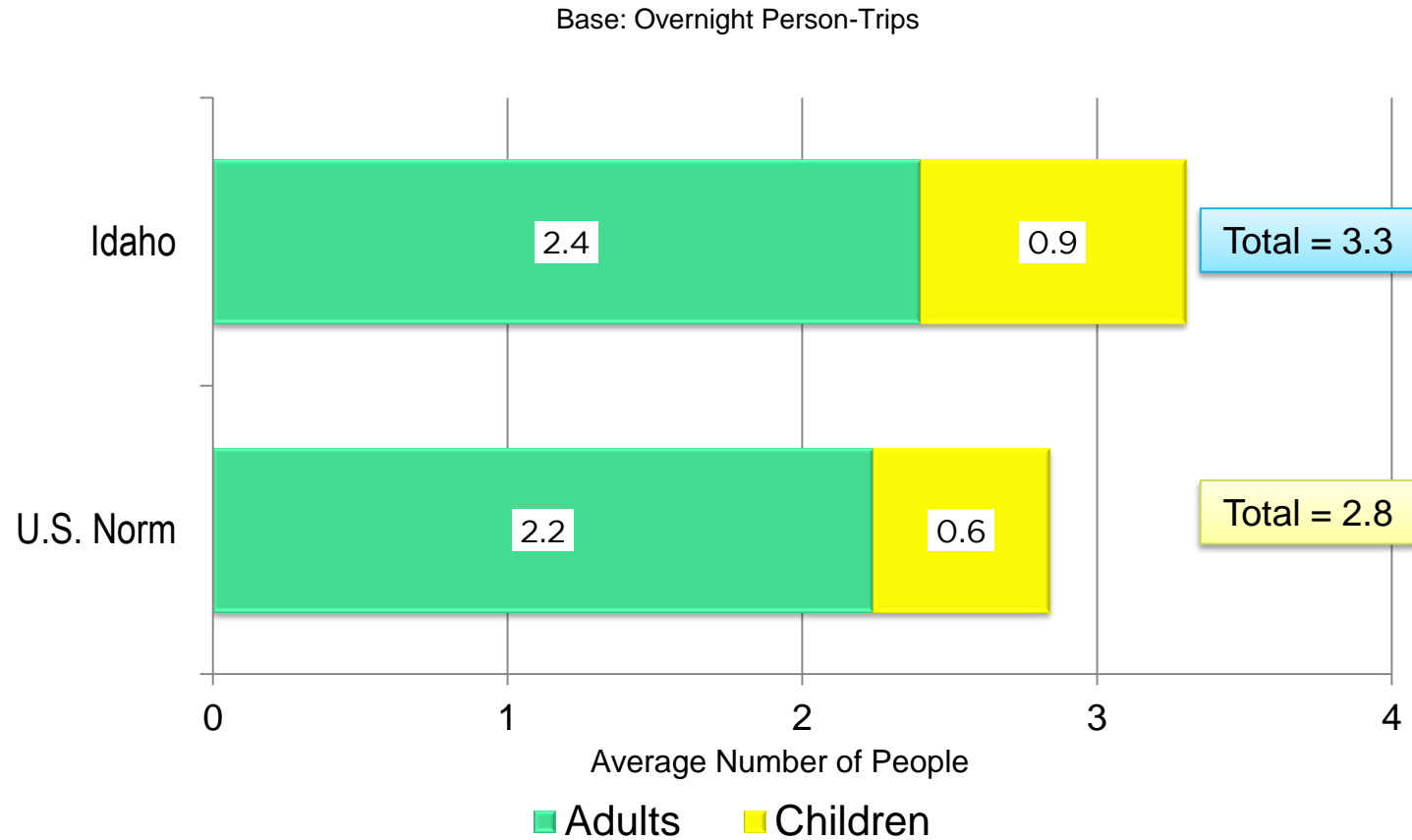
Base: Overnight Person-Trips with 1+ Nights Spent In Idaho



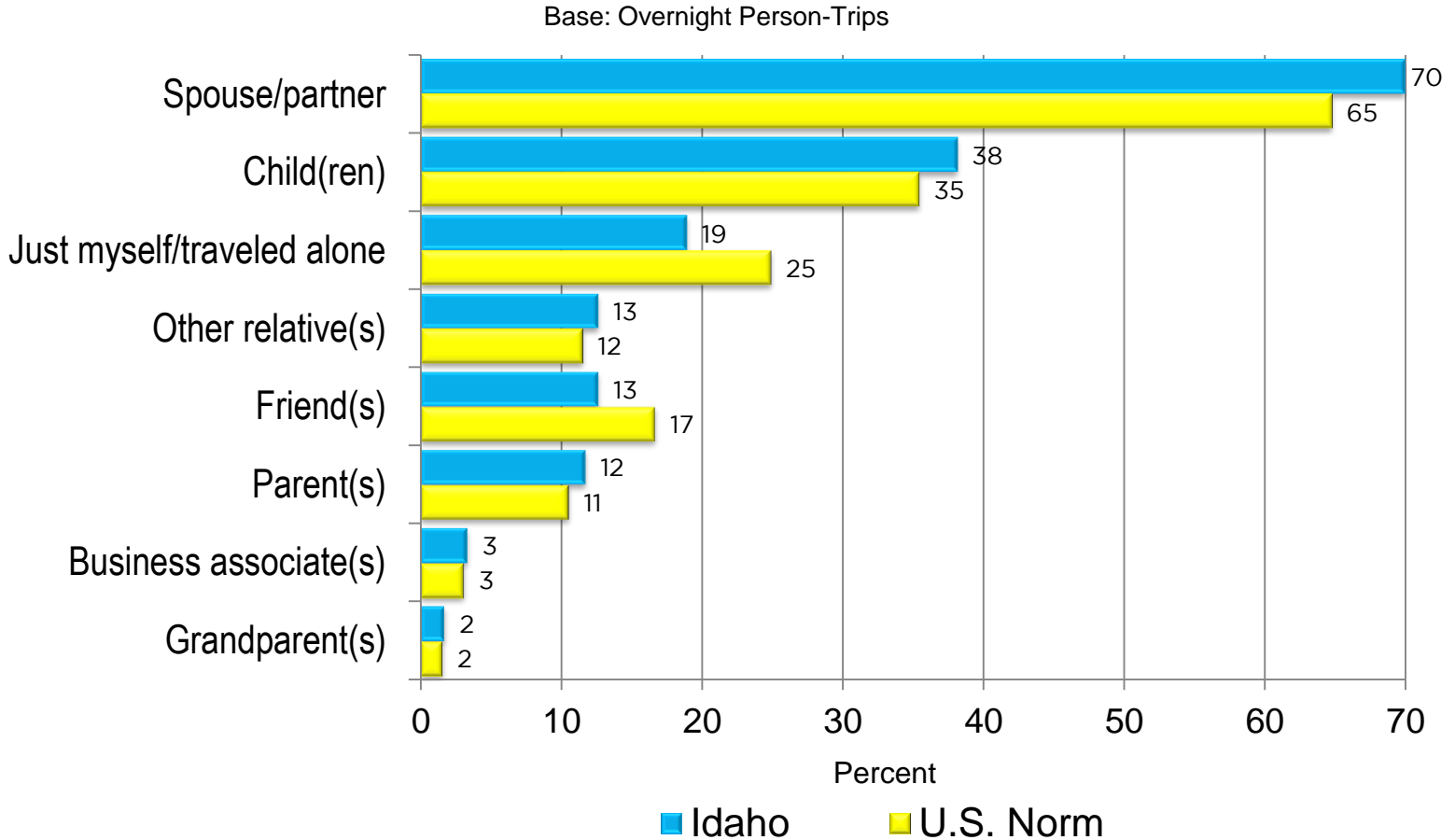
Number of Nights Spent in Idaho - 2017 vs. 2015



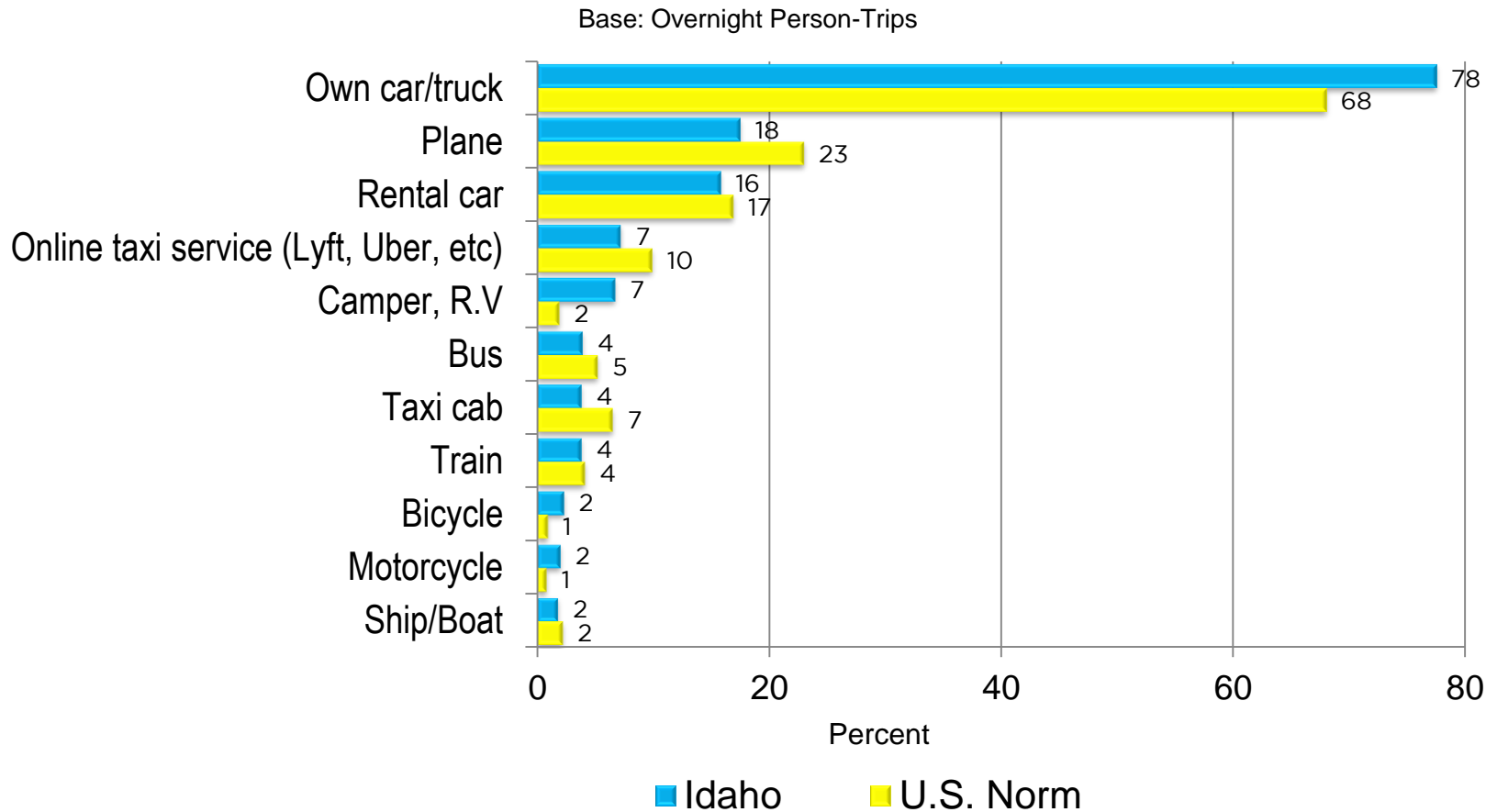
Size of Travel Party



Composition of Immediate Travel Party

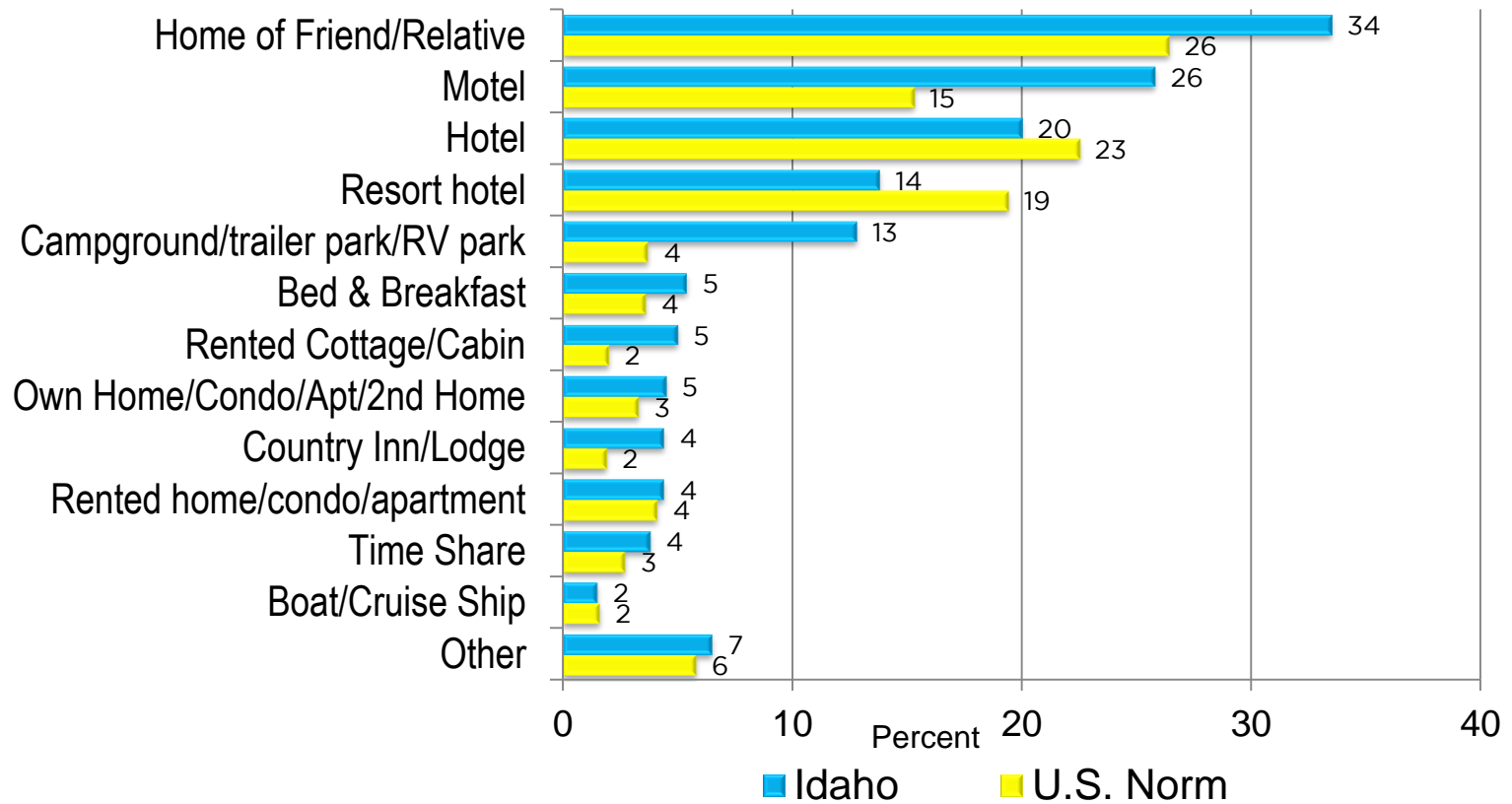


Transportation



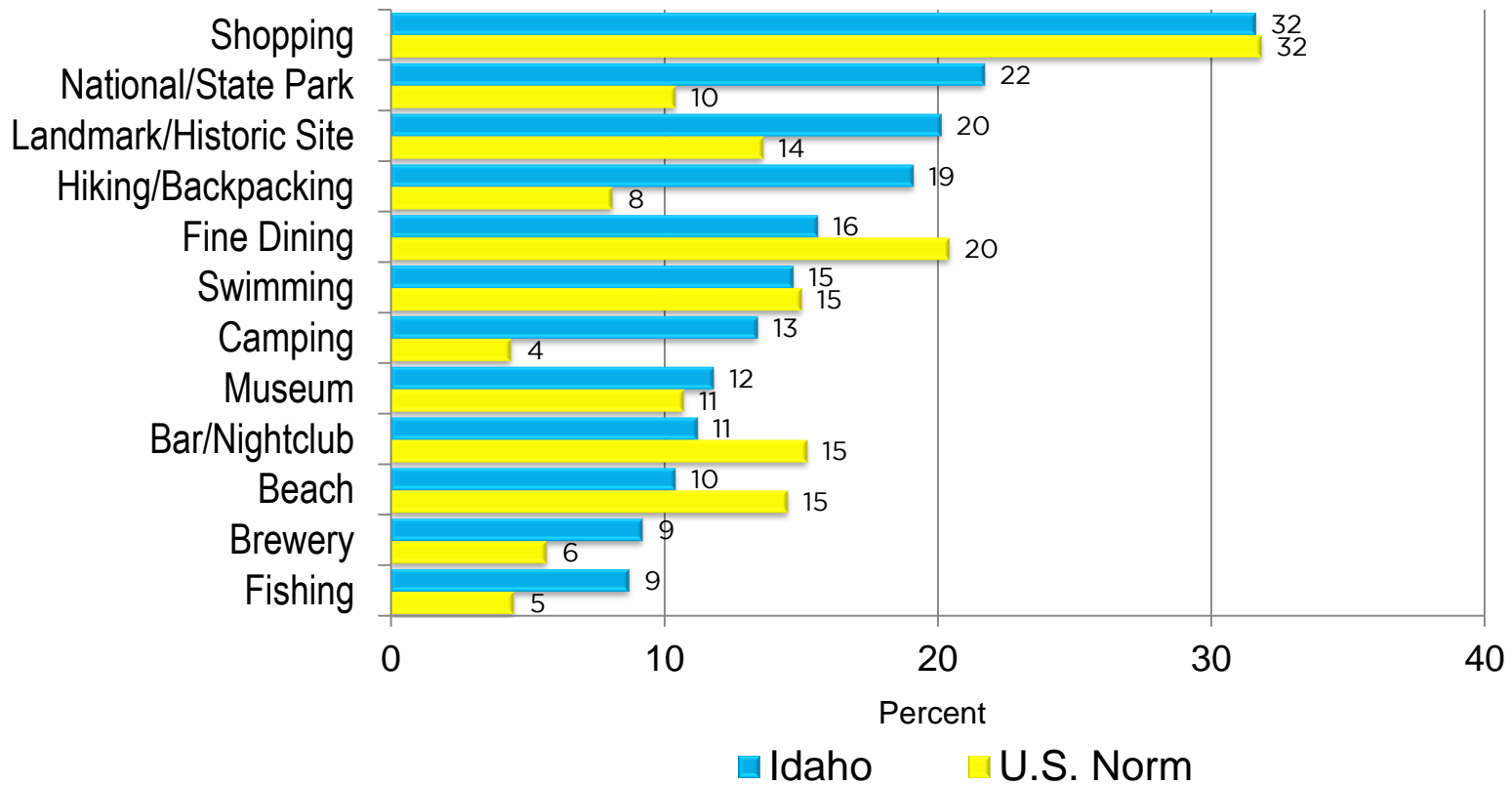
Accommodations

Base: Overnight Person-Trips



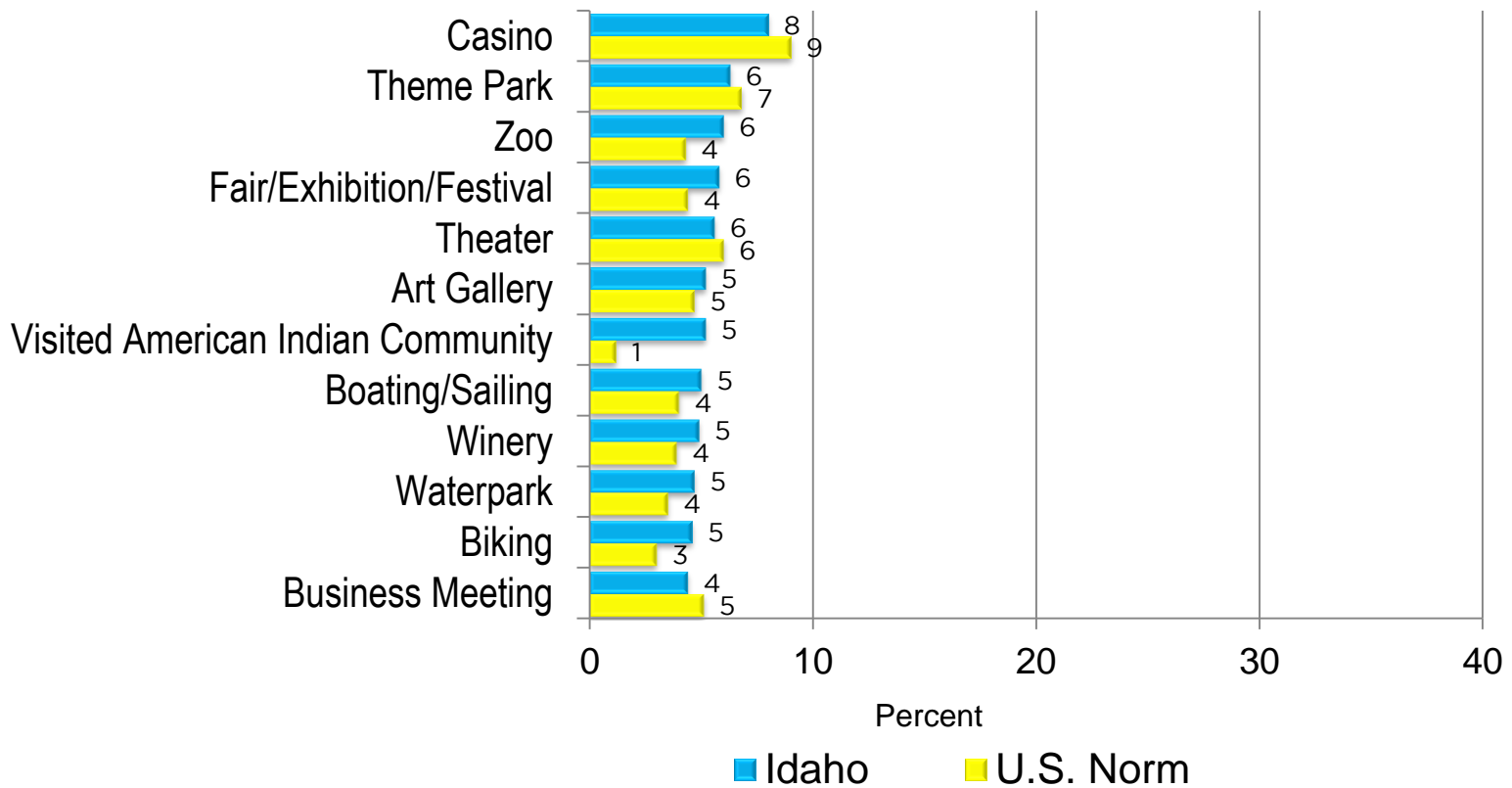
Activities and Experiences

Base: Overnight Person-Trips



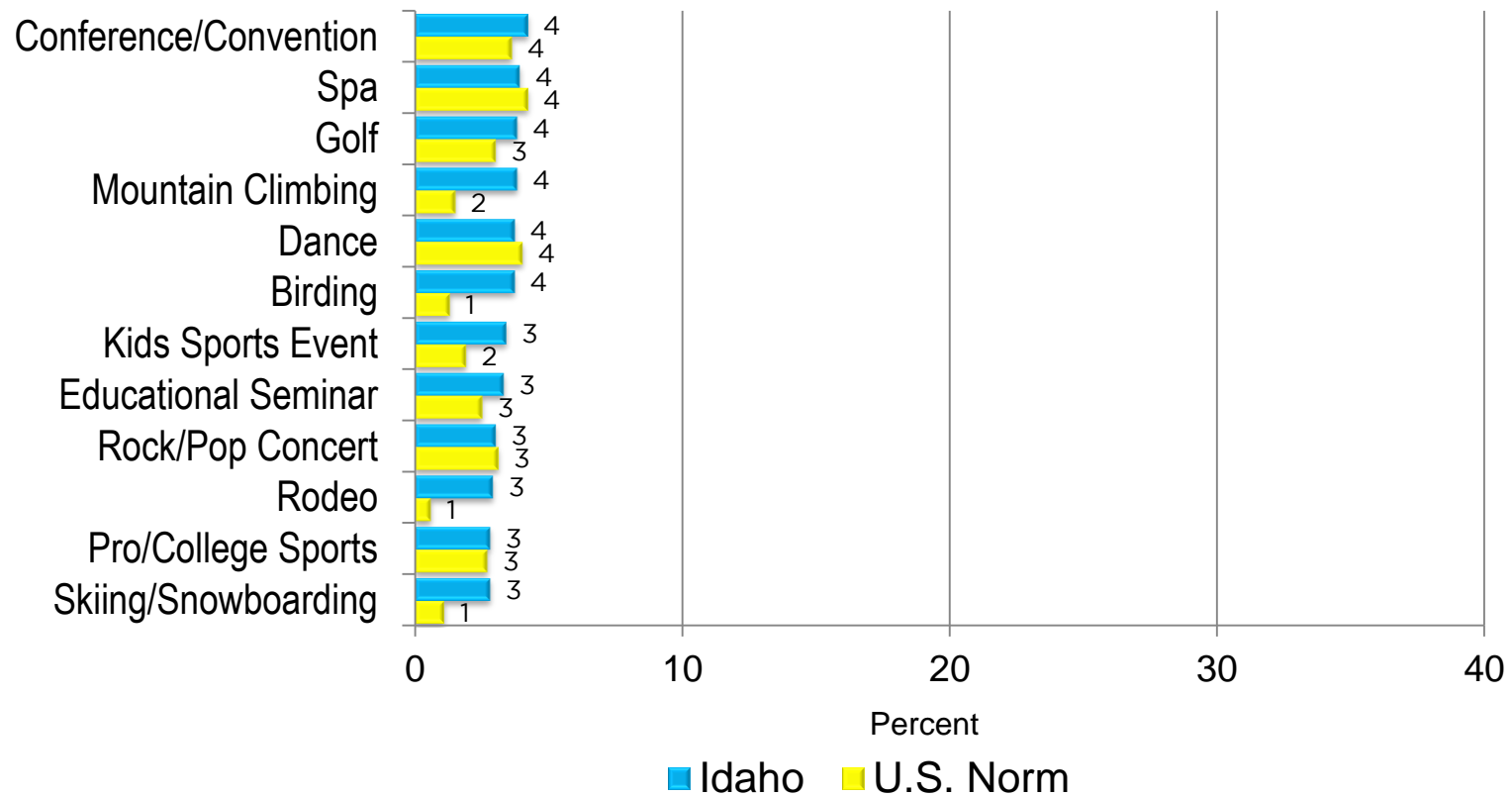
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



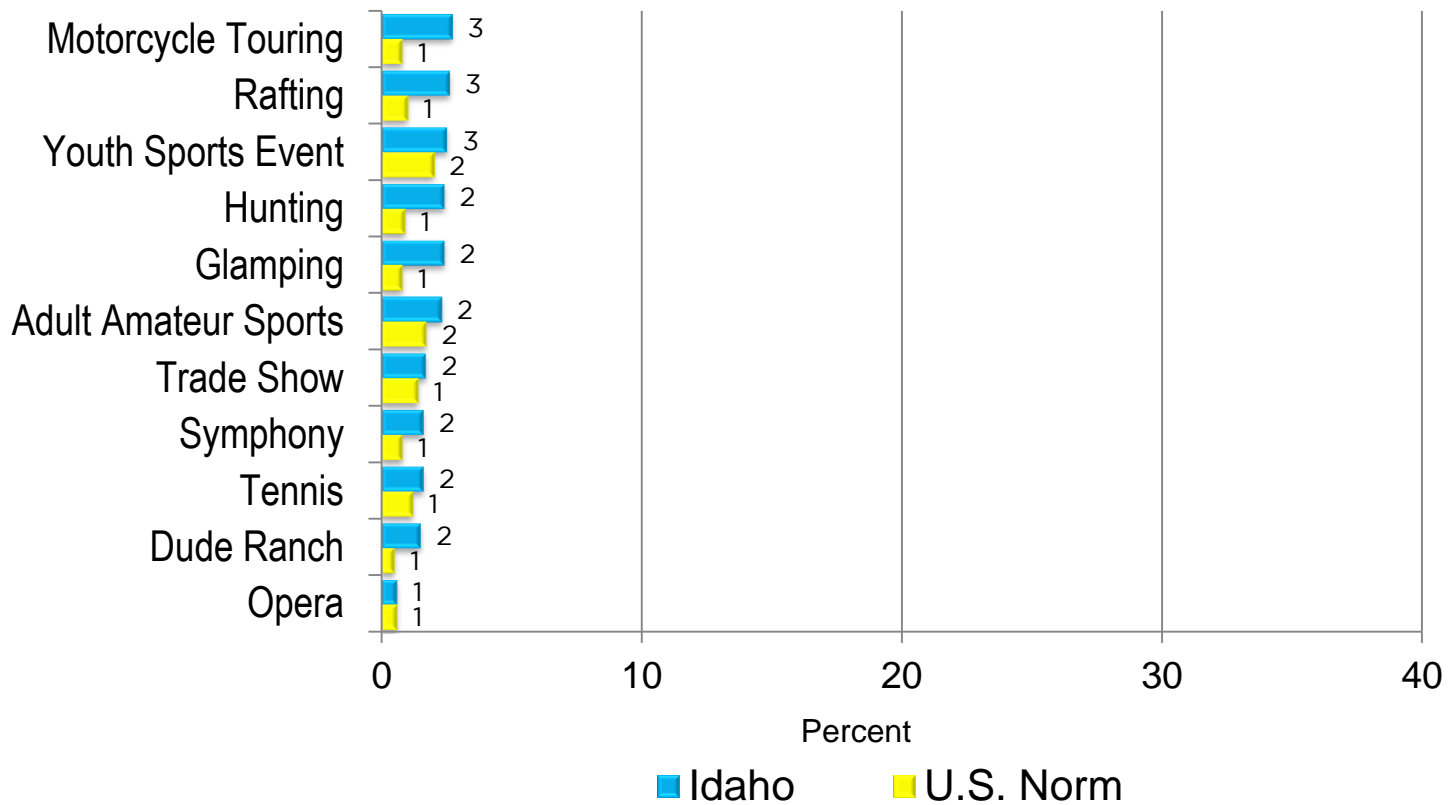
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



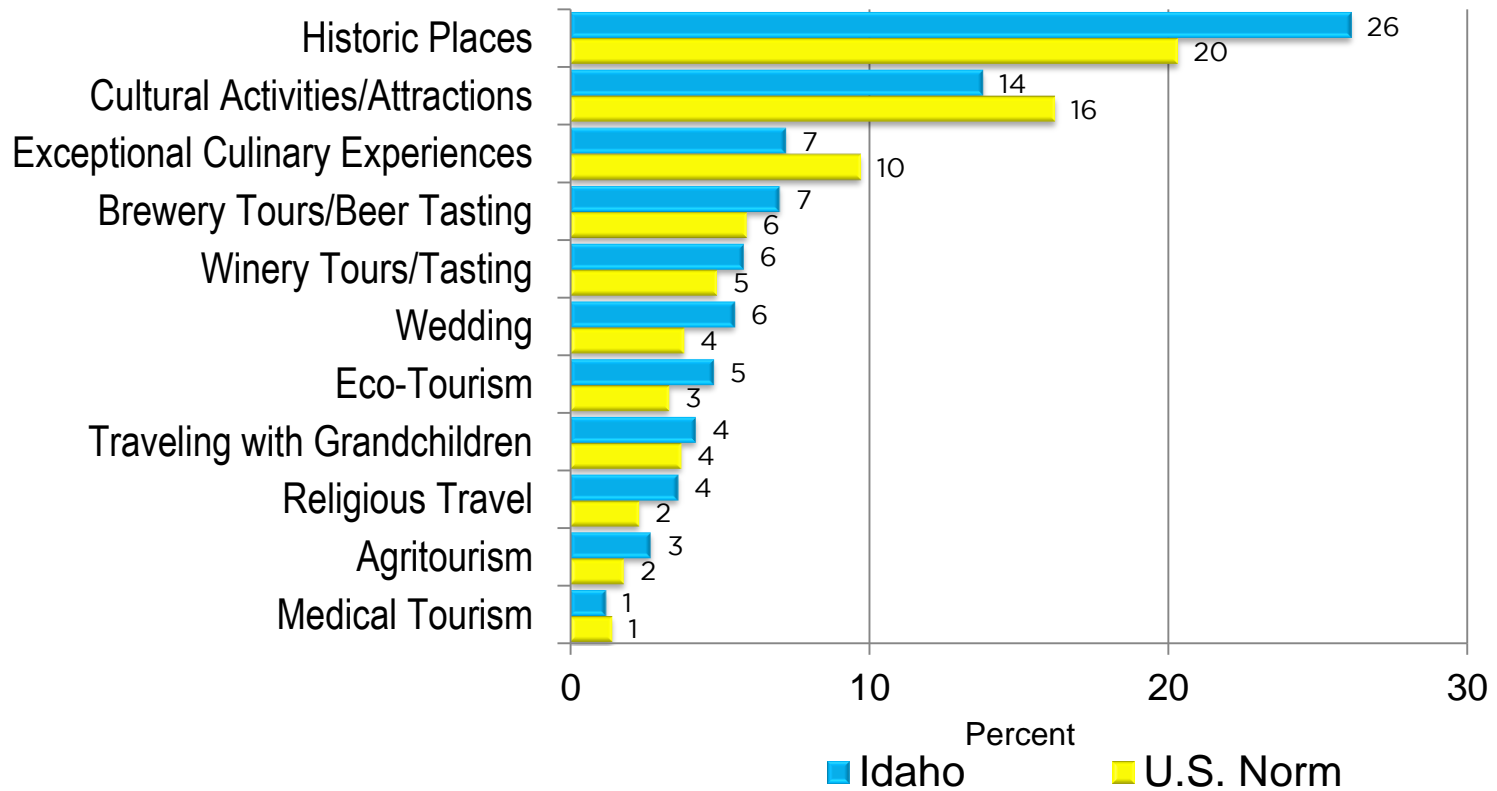
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



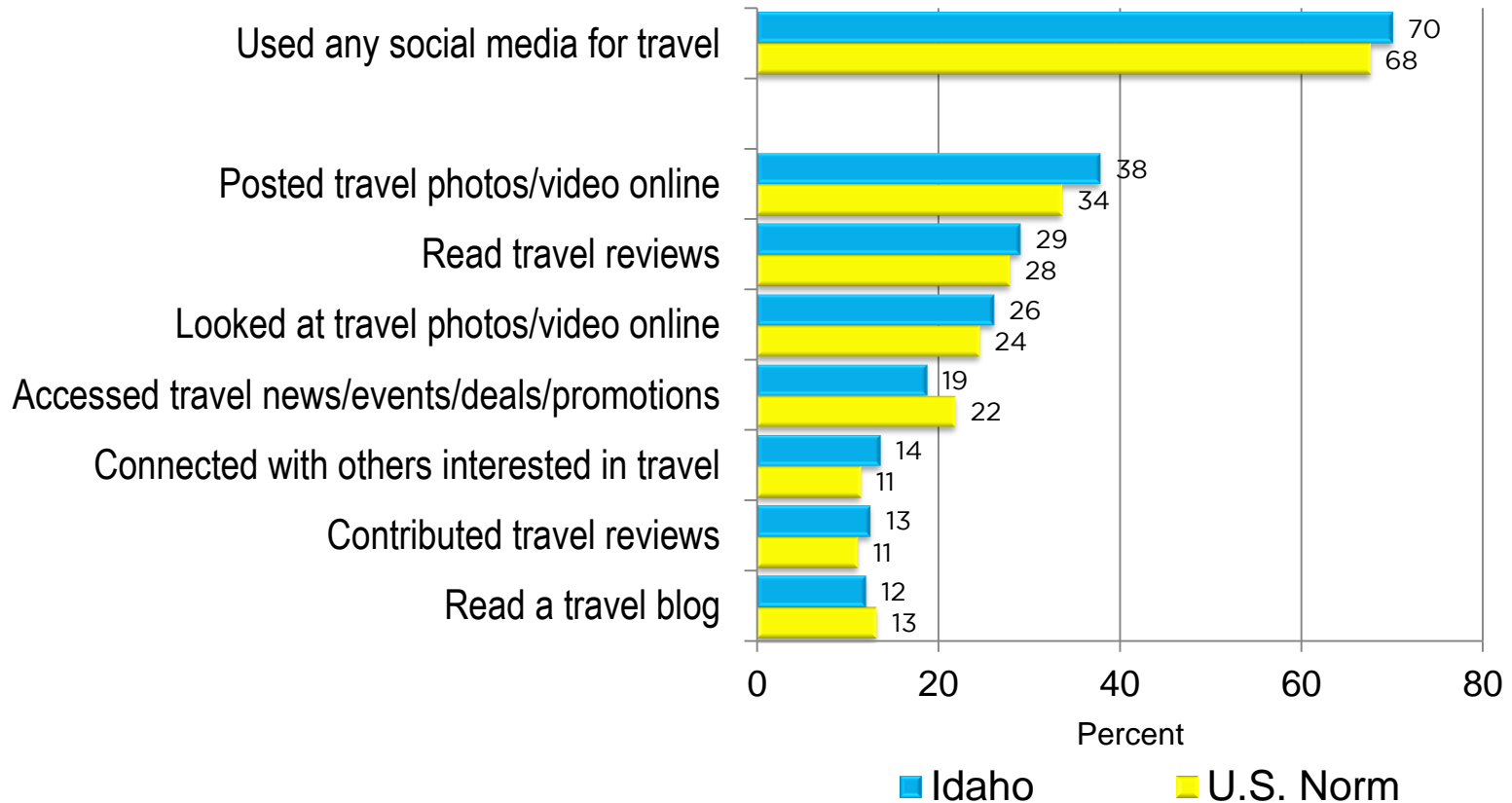
Activities of Special Interest

Base: Overnight Person-Trips



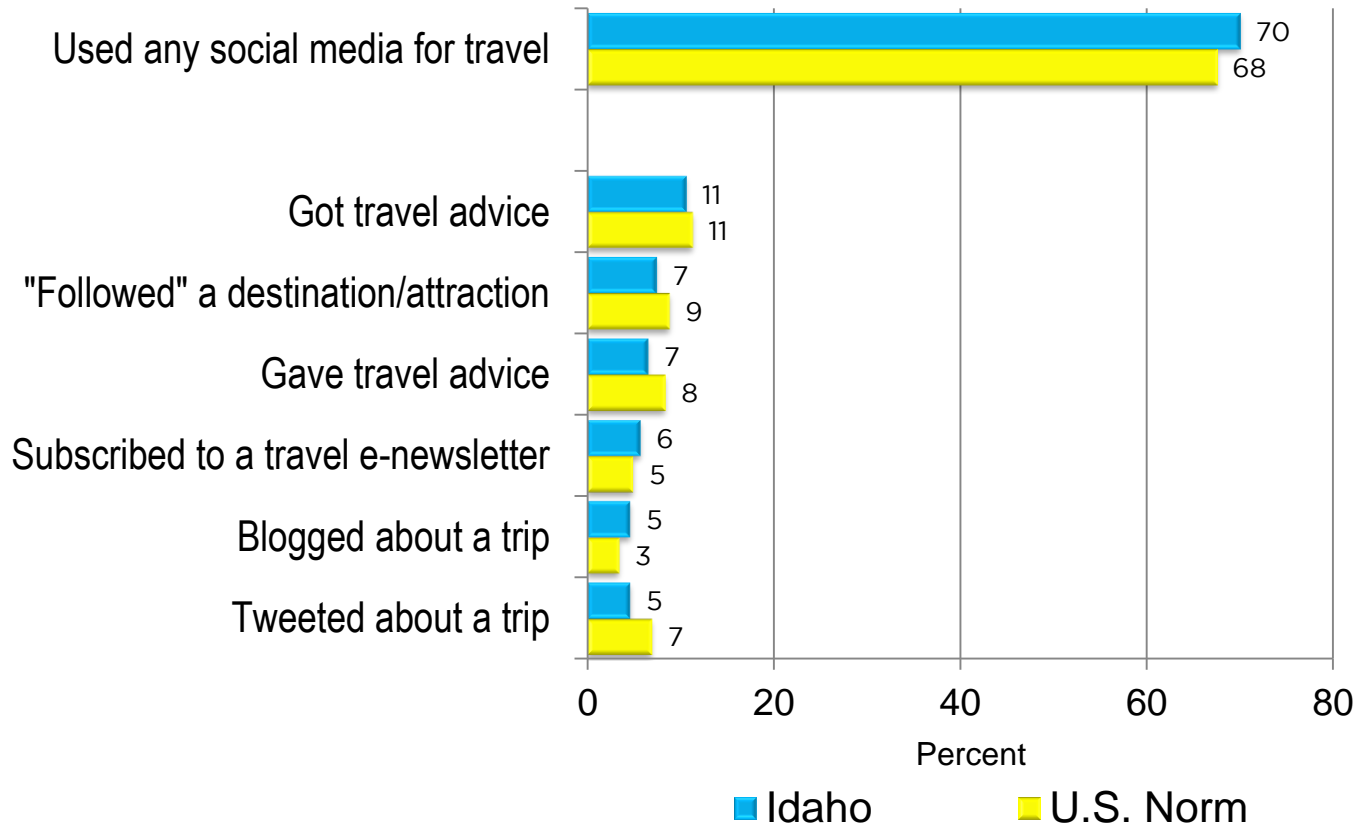
Online Social Media Use by Travelers

Base: Overnight Person-Trips



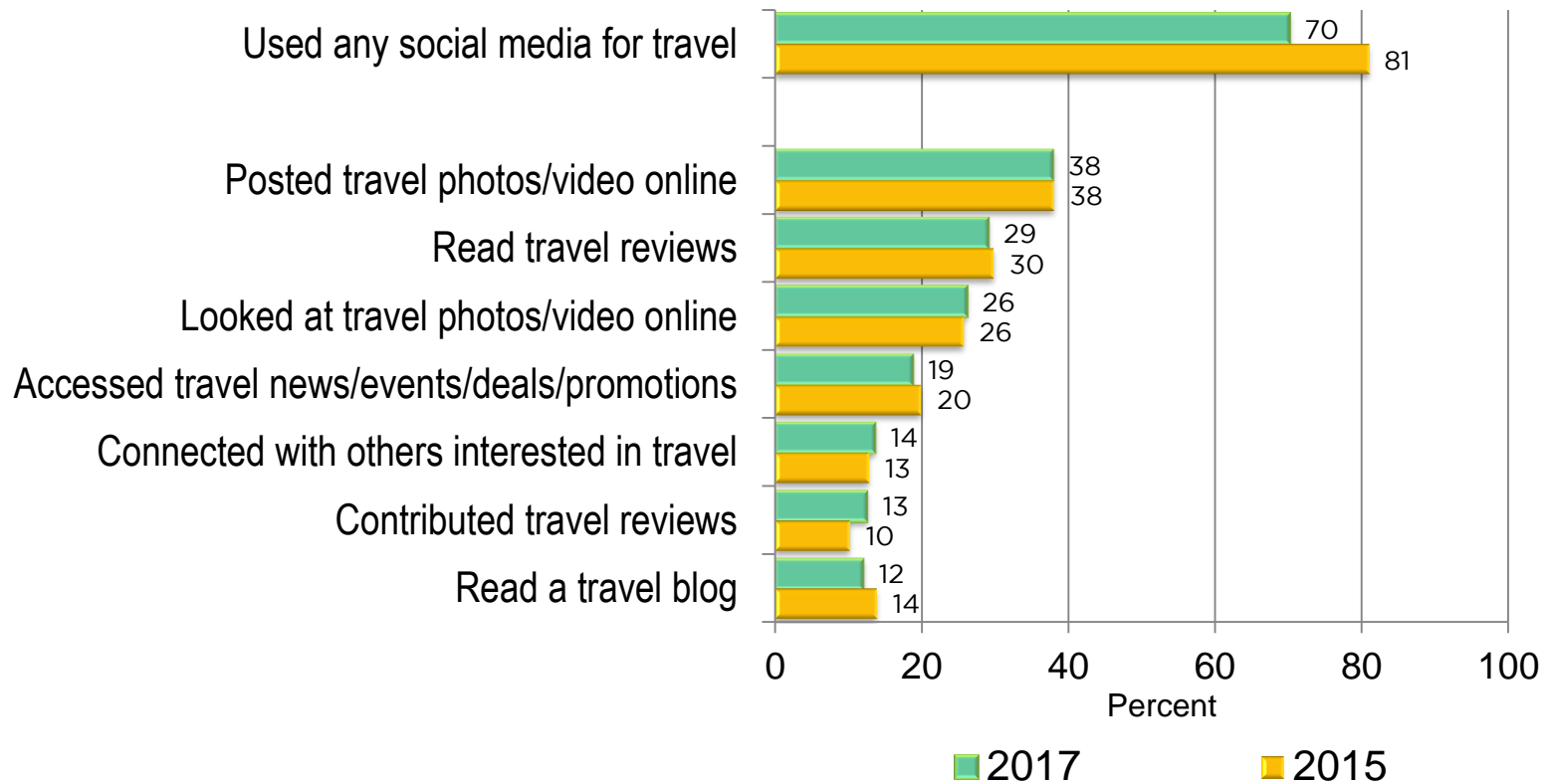
Online Social Media Use by Travelers (Cont'd)

Base: Overnight Person-Trips



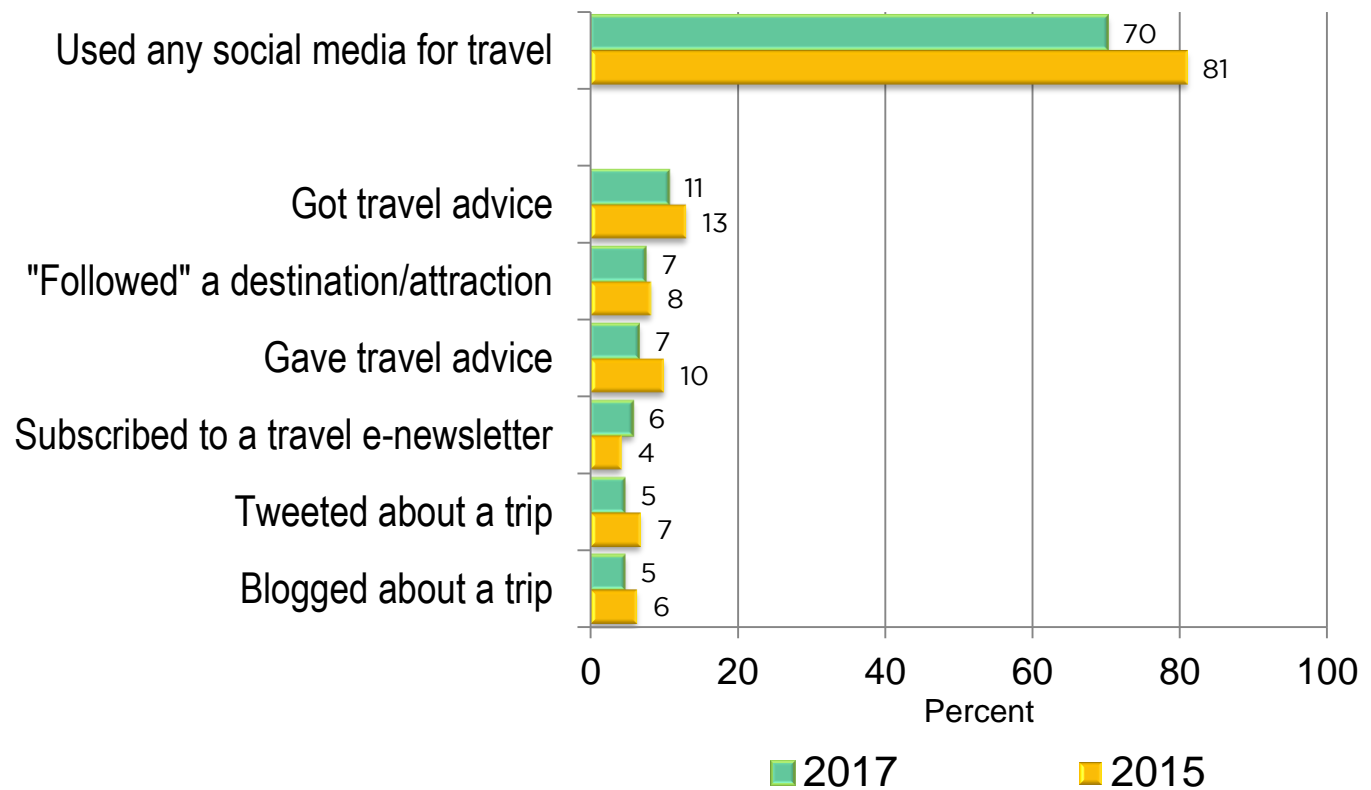
Online Social Media Use by Travelers – 2017 vs. 2015

Base: Overnight Person-Trips



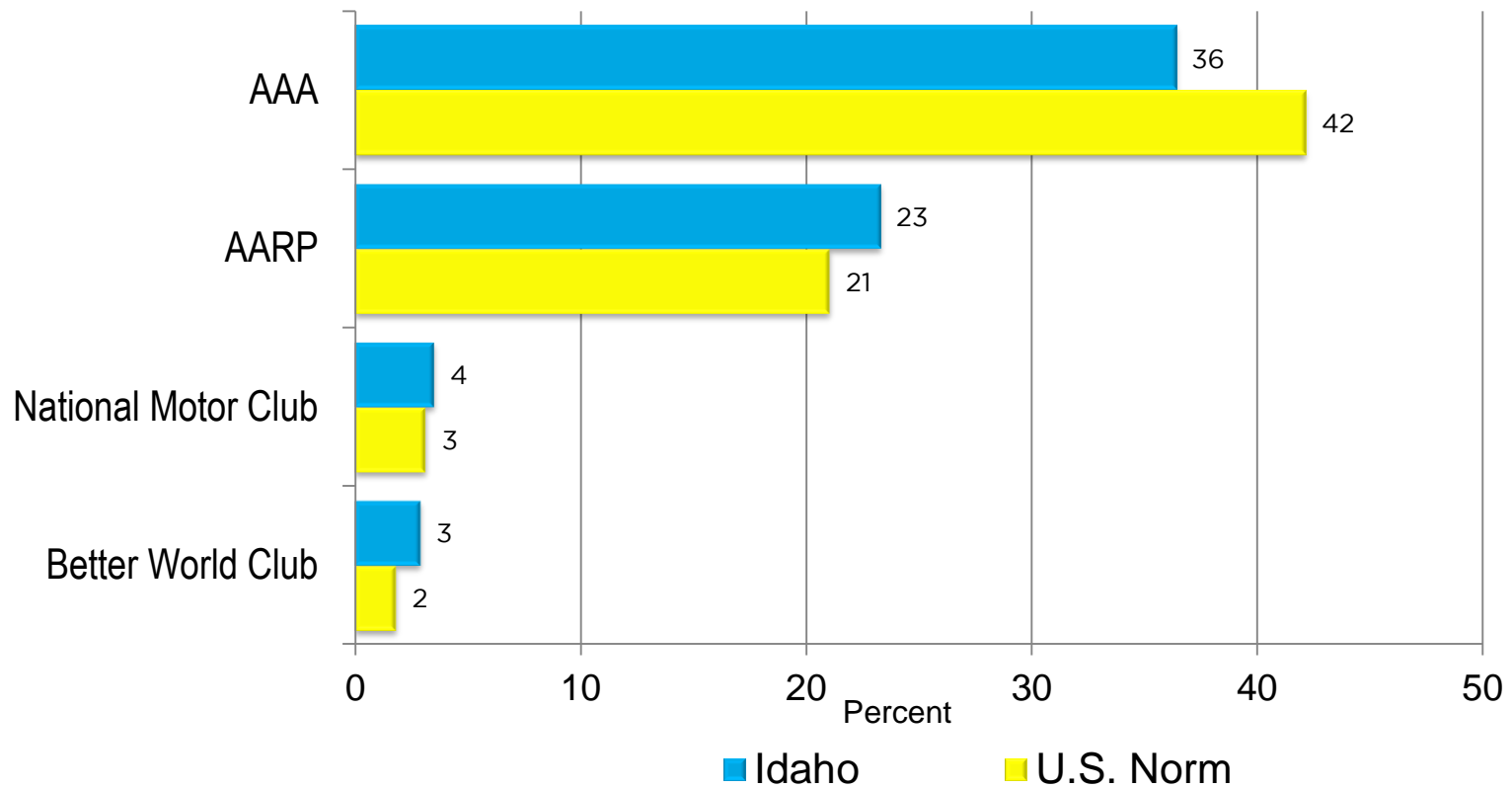
Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)

Base: Overnight Person-Trips



Organization Membership

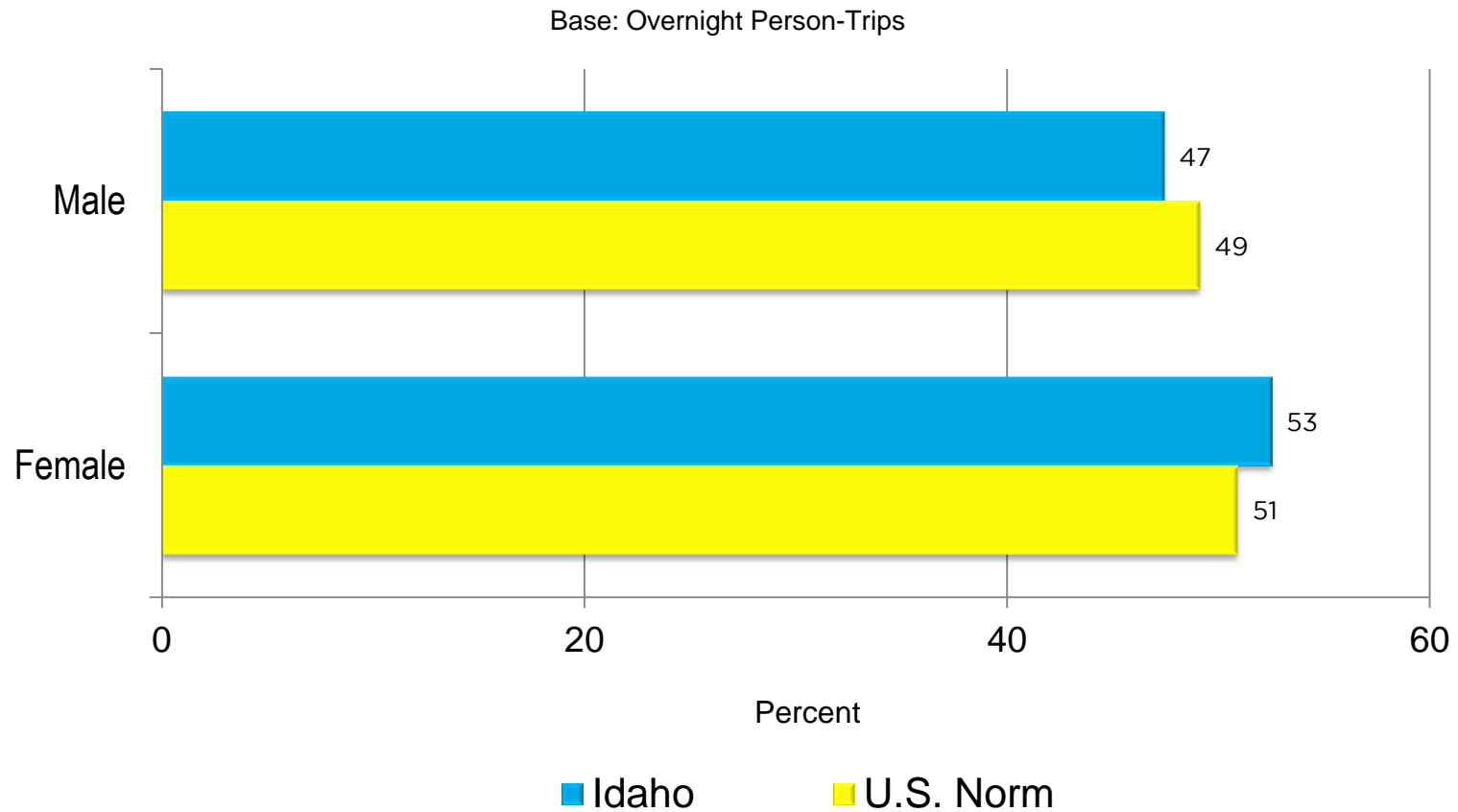
Base: Overnight Person-Trips



Demographic Profile of Overnight Visitors

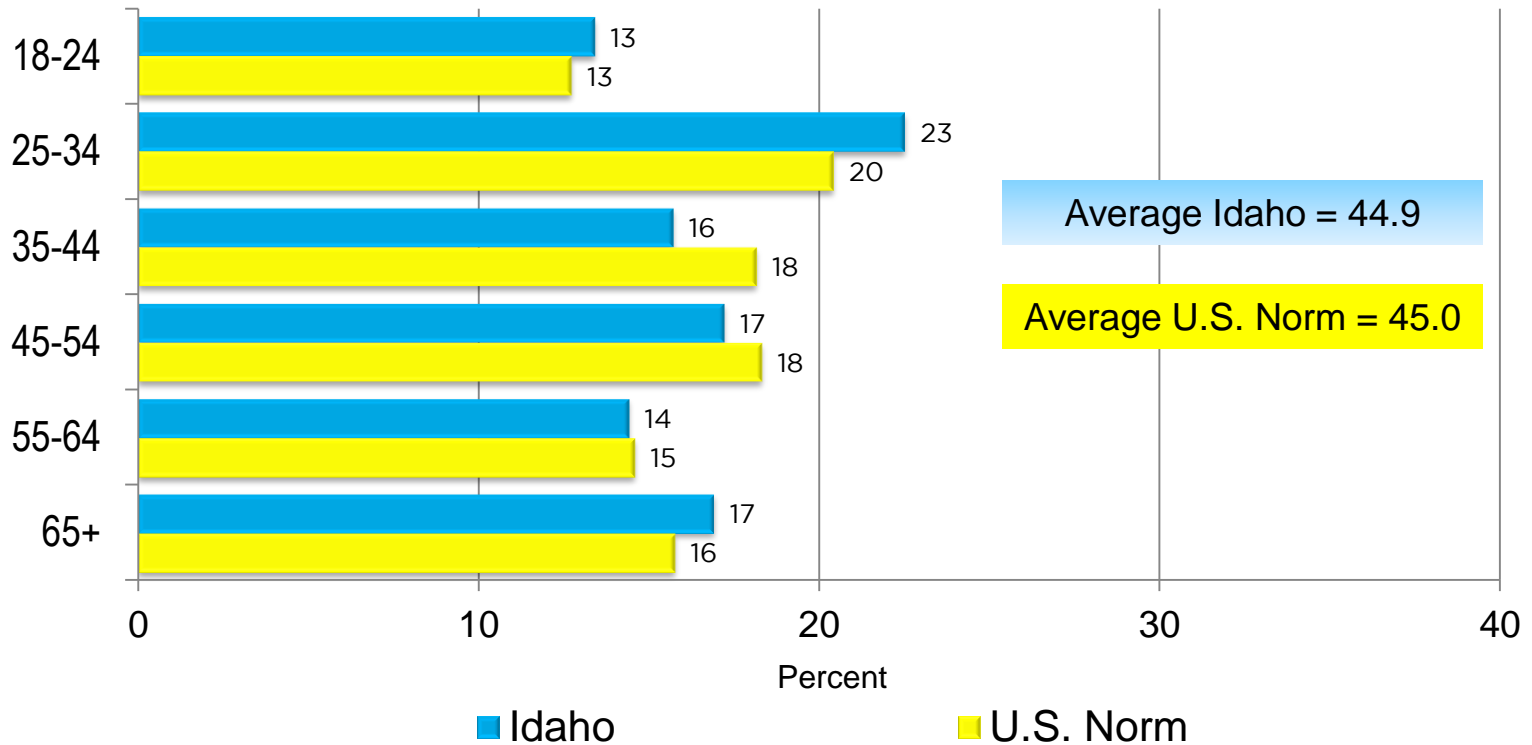


Gender

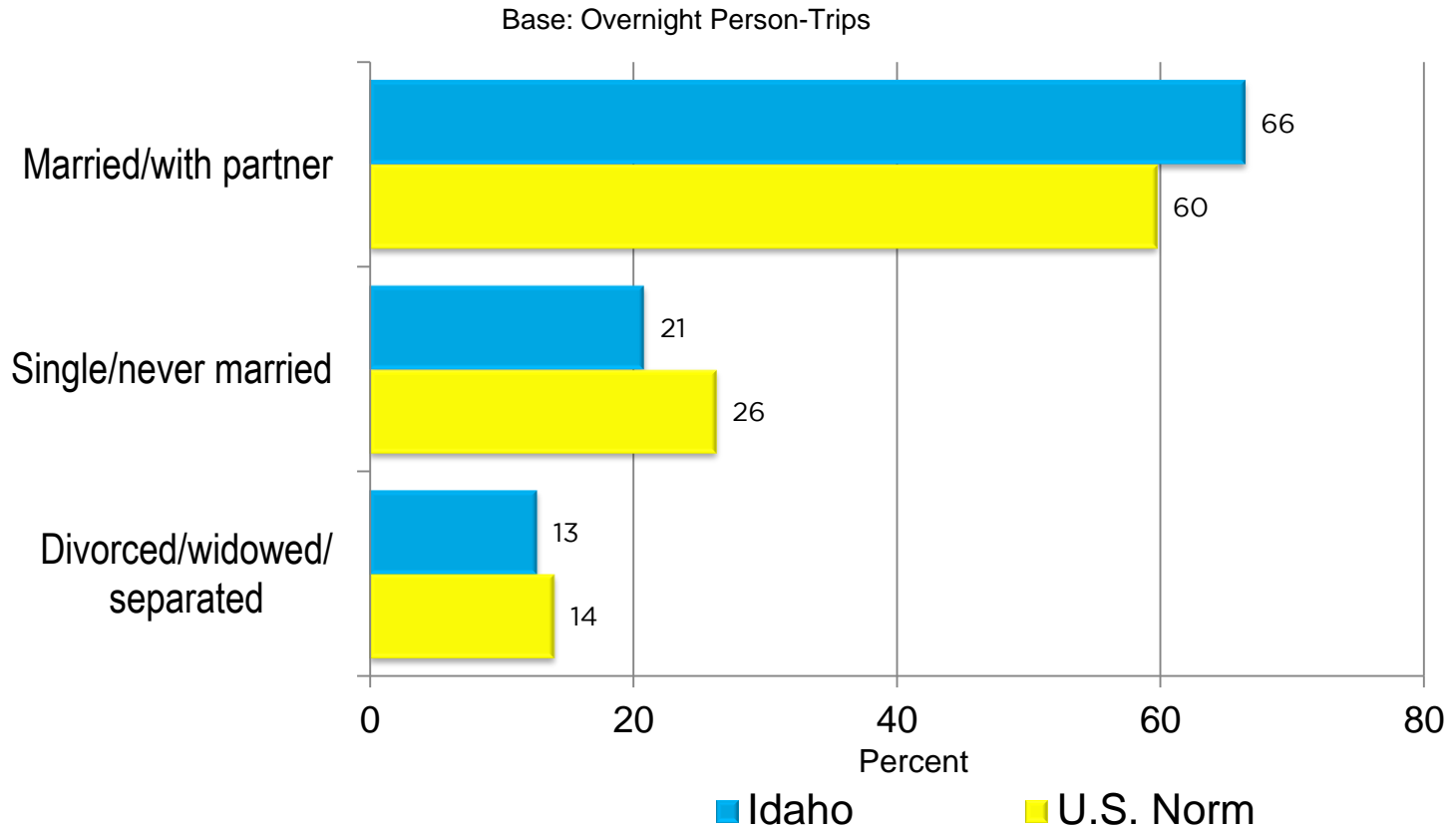


Age

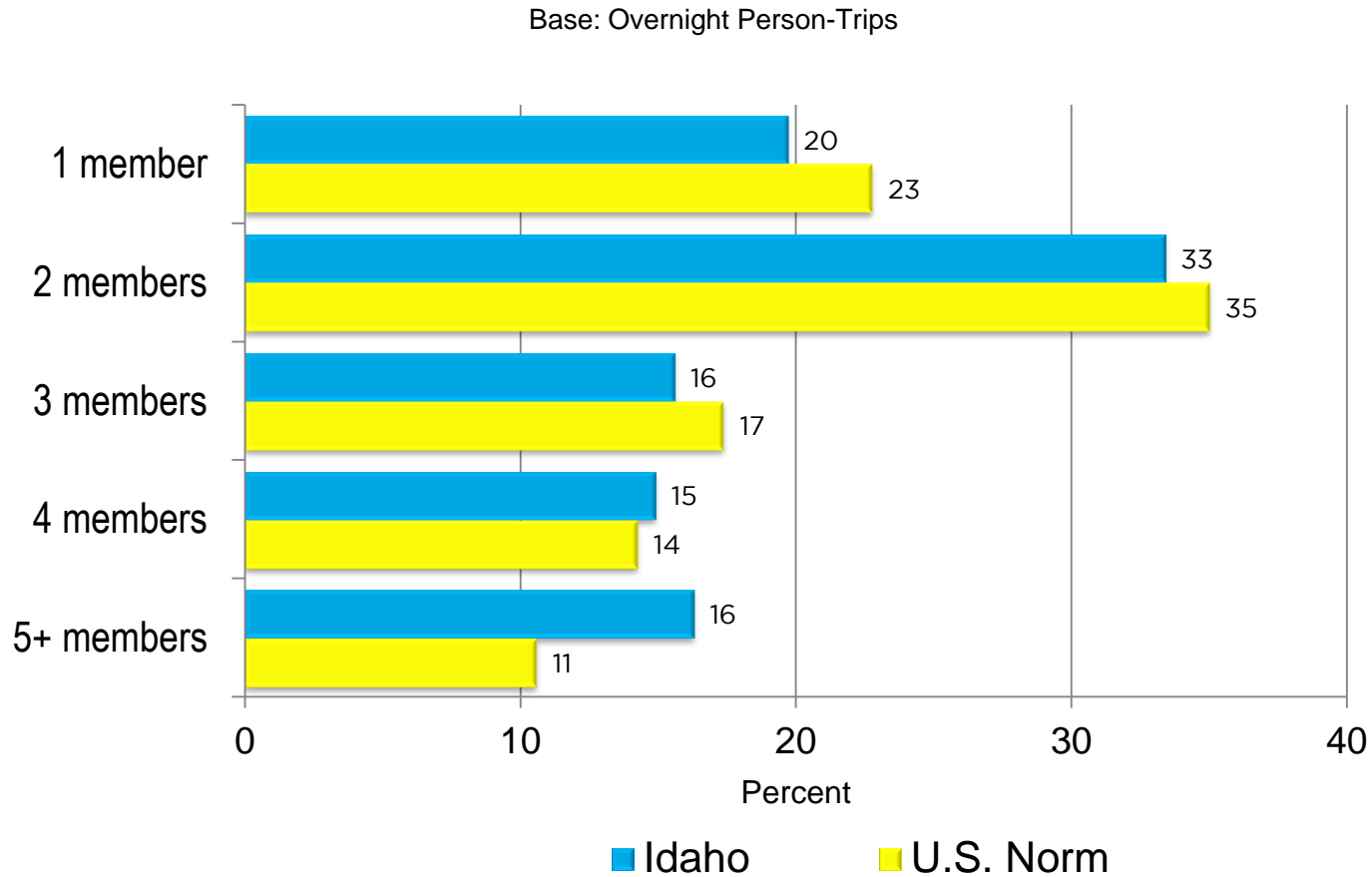
Base: Overnight Person-Trips



Marital Status

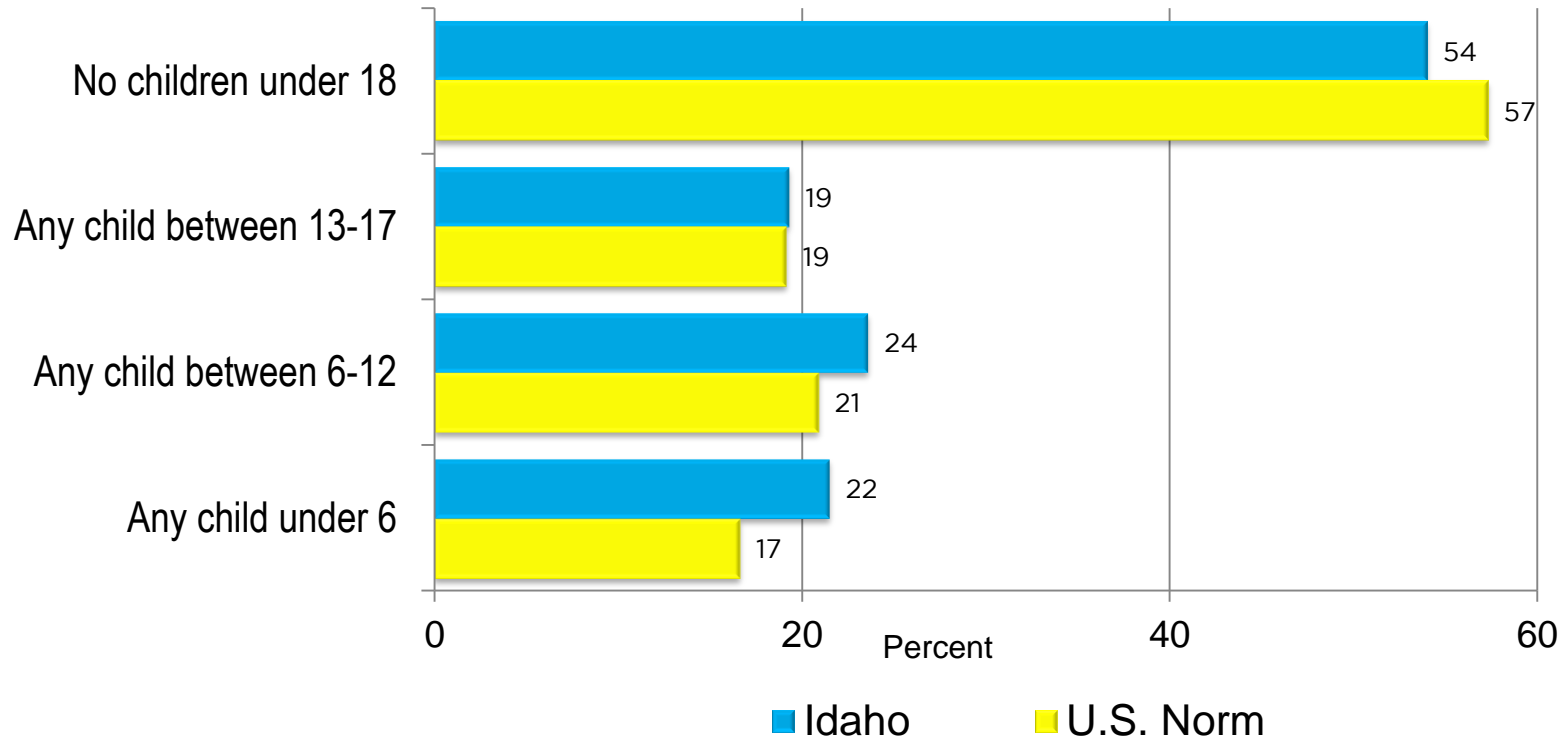


Household Size



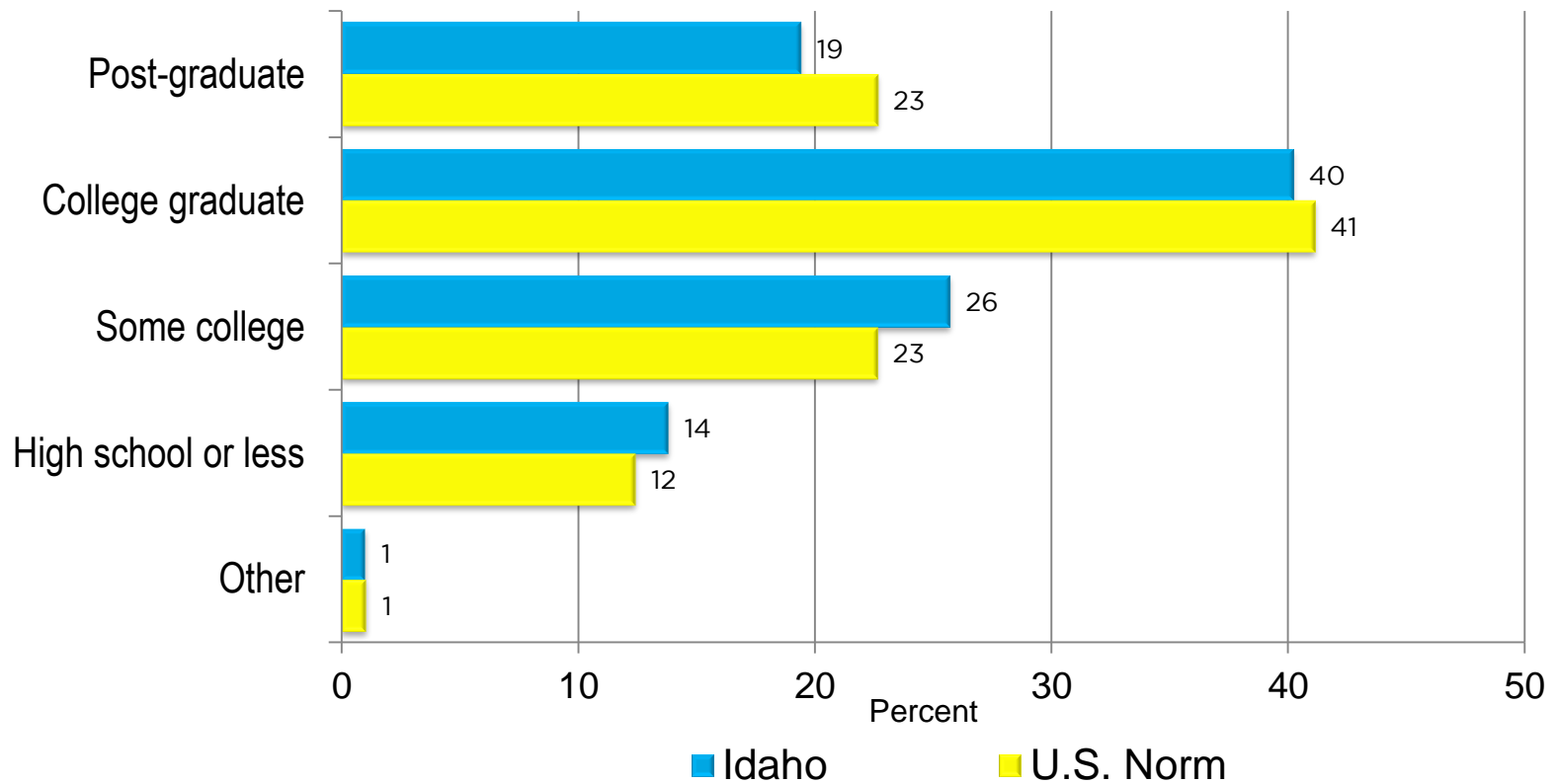
Children in Household

Base: Overnight Person-Trips



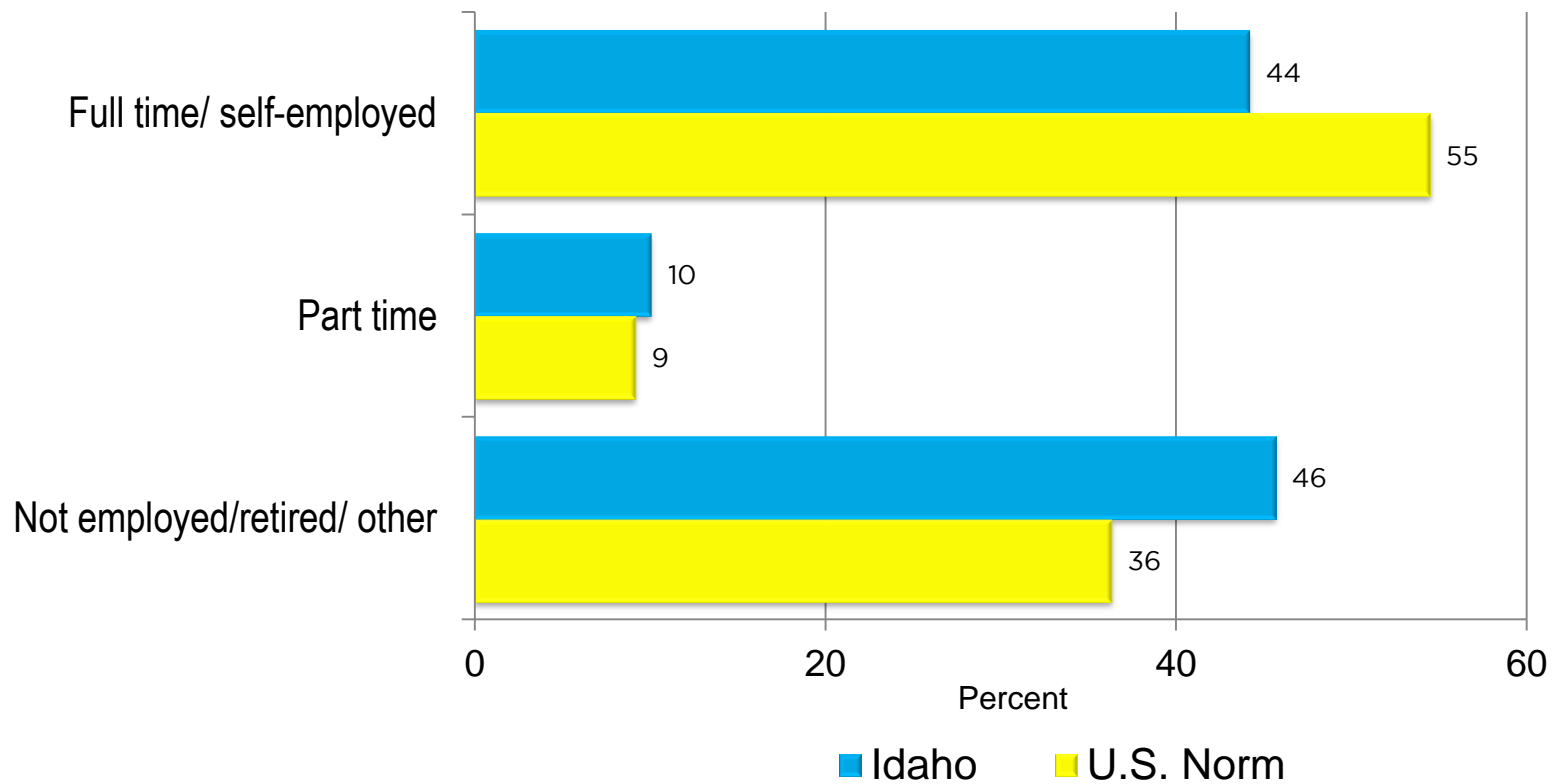
Education

Base: Overnight Person-Trips



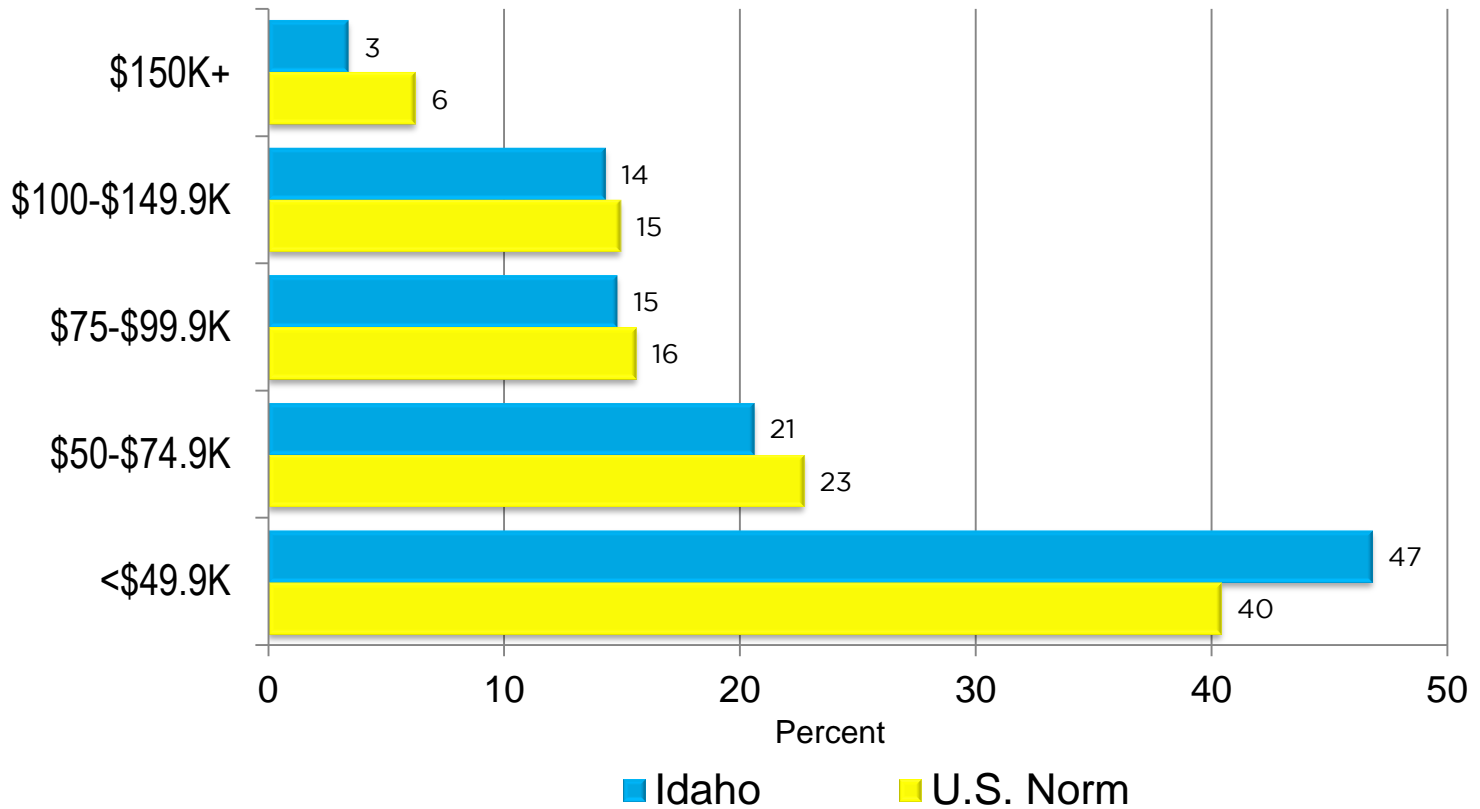
Employment

Base: Overnight Person-Trips

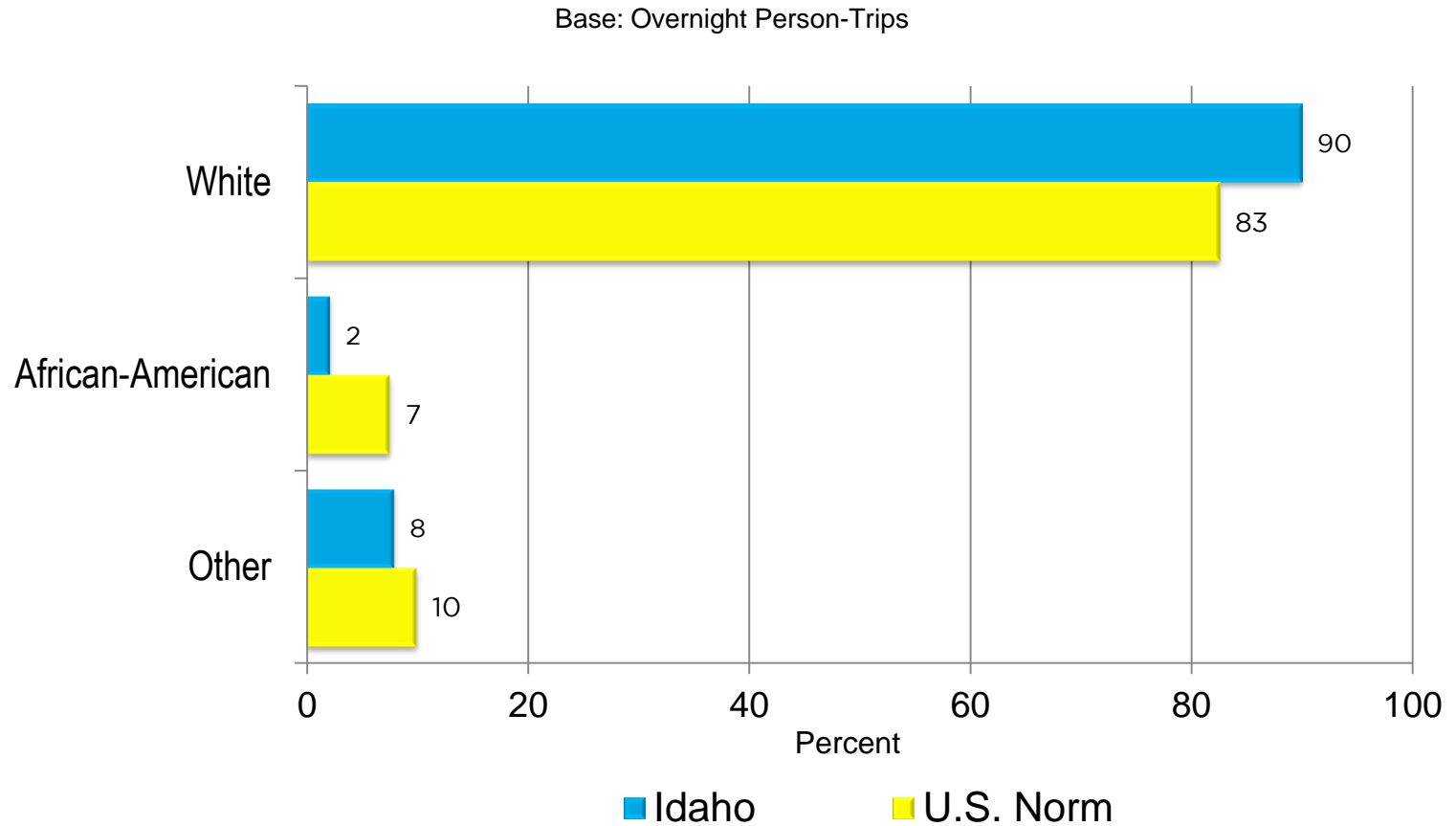


Household Income

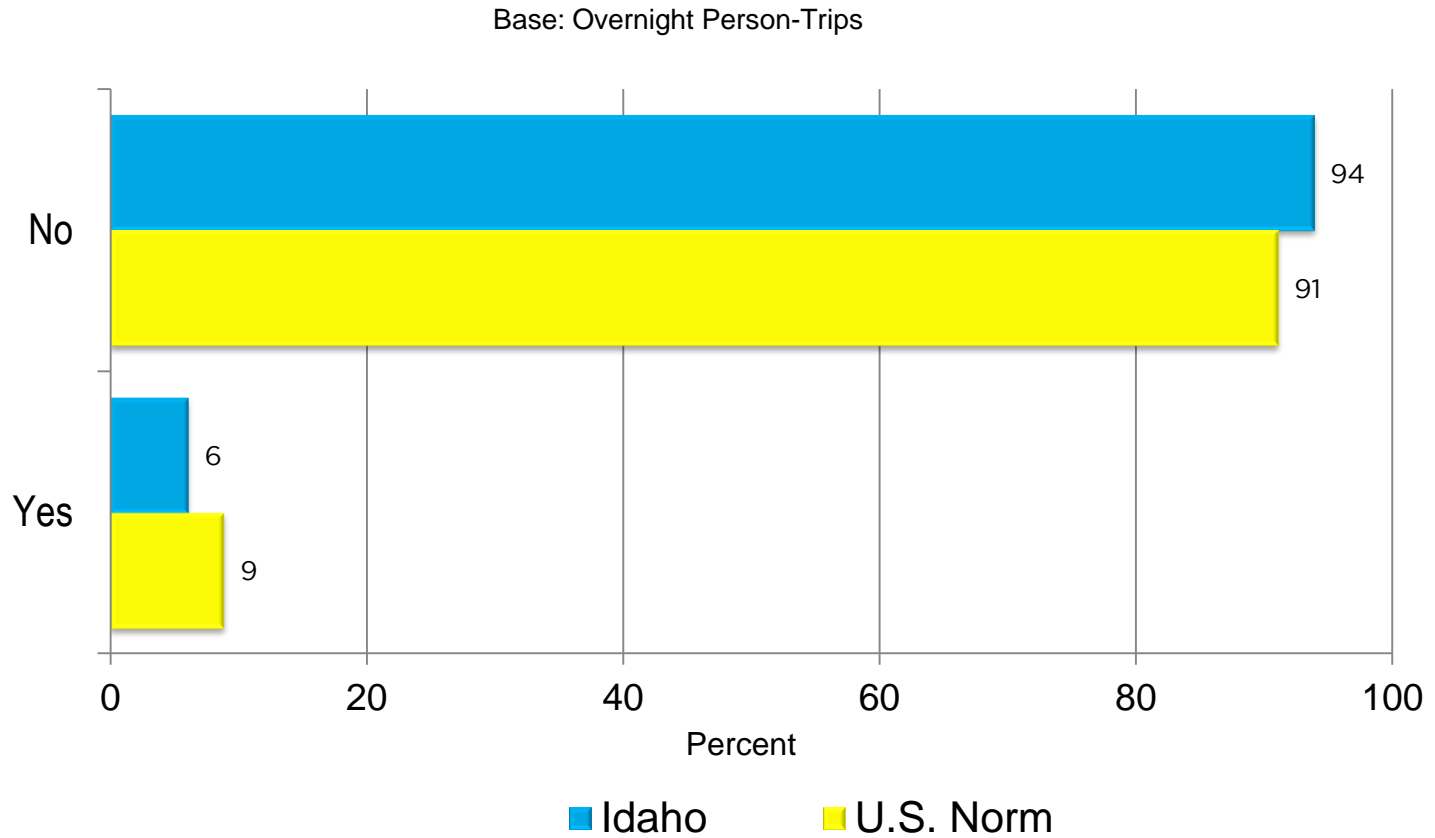
Base: Overnight Person-Trips



Race



Hispanic Background



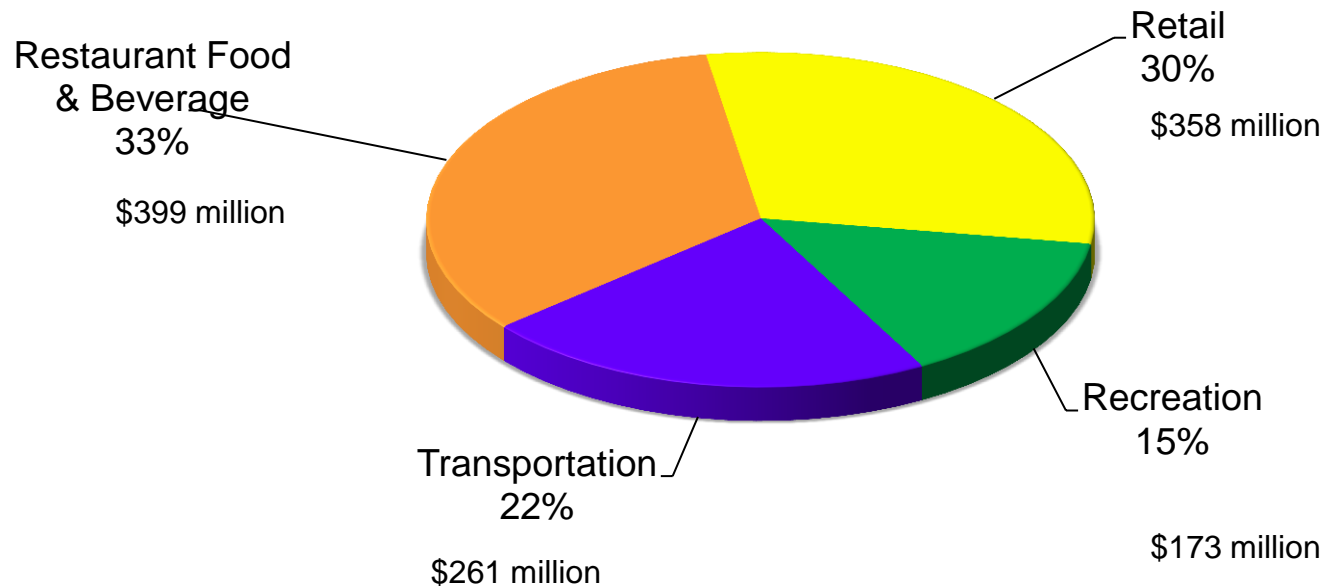
Day Trip Expenditures



Total Idaho Domestic Day Trip Spending — by Sector

Total Spending = \$1.2 billion

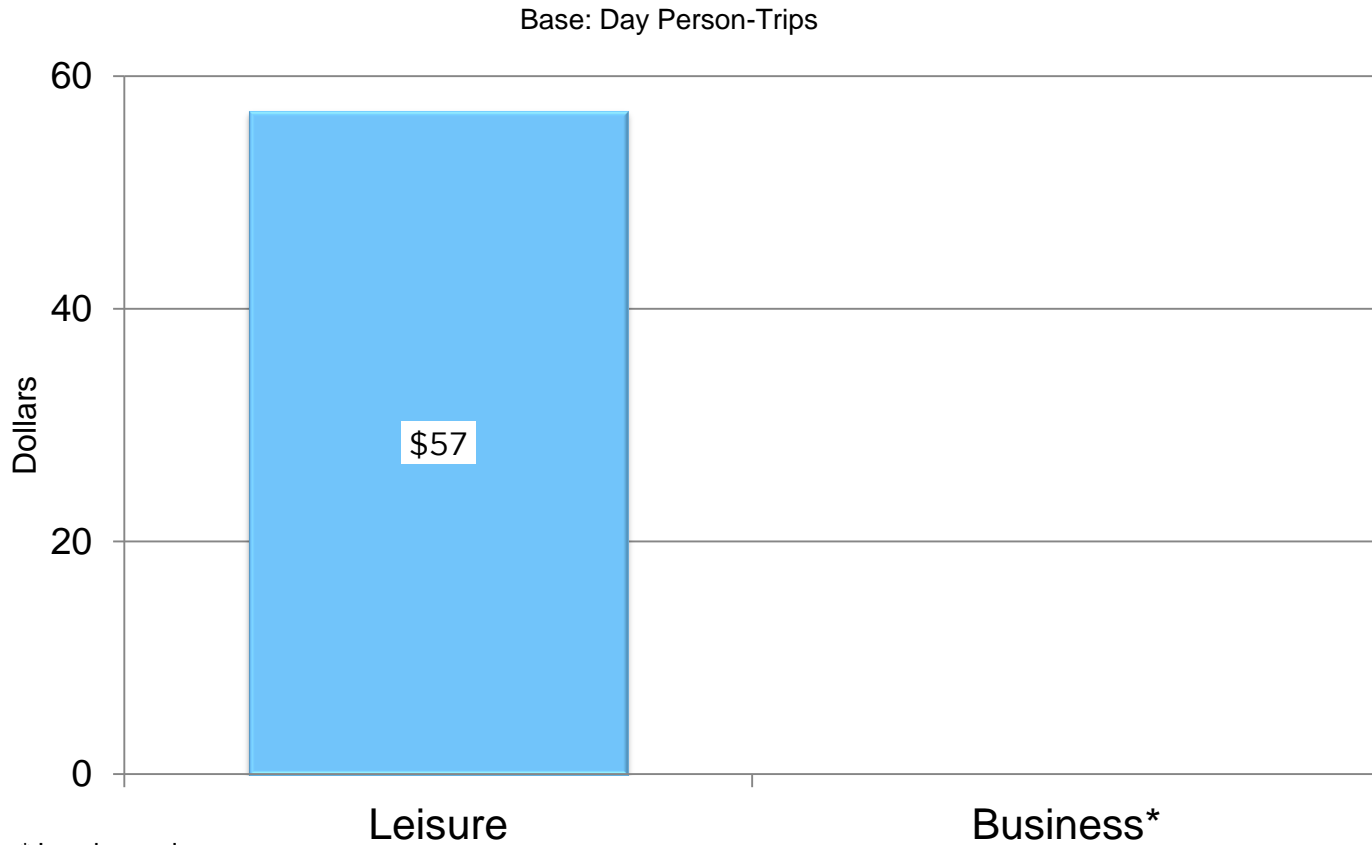
+9.3% vs. 2015



Average Per Person Expenditures on Day Trips — By Sector

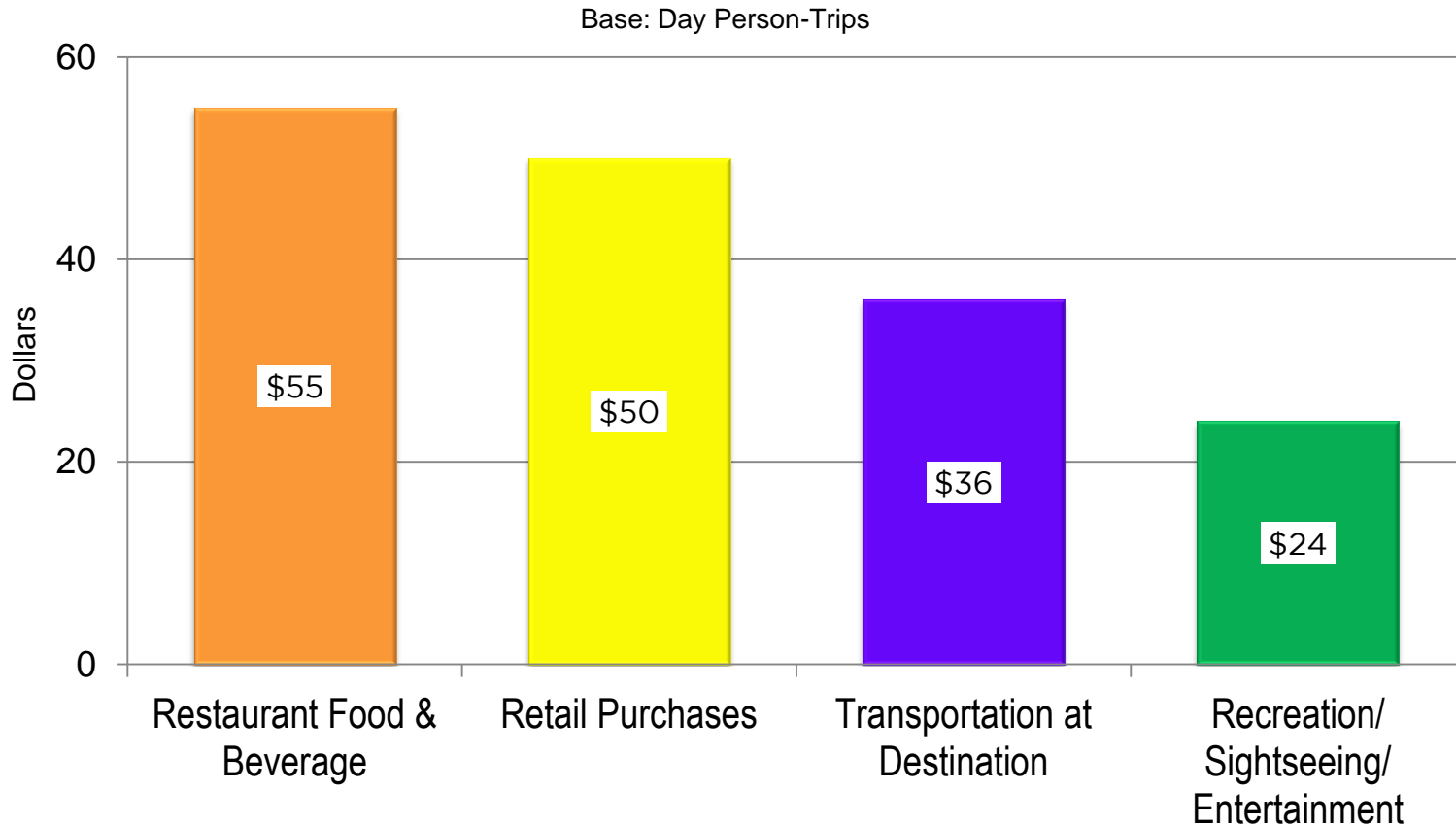


Average Per Person Expenditures on Day Trips — by Trip Purpose



* Low base sizes

Average Per Party Expenditures on Day Trips — By Sector



Average Per Party Expenditures on Day Trip — by Trip Purpose



* Low base sizes

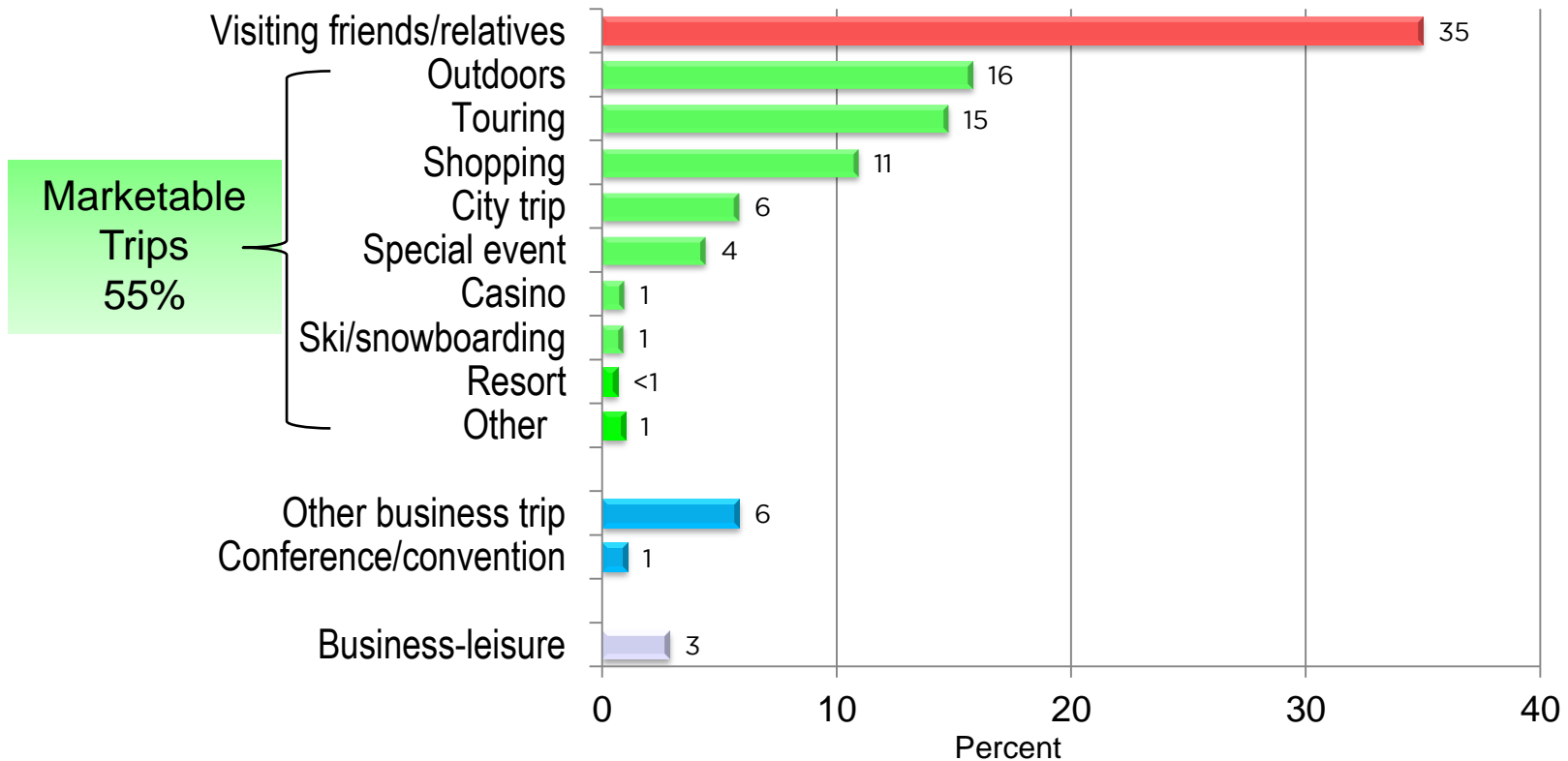


Day Trip Characteristics

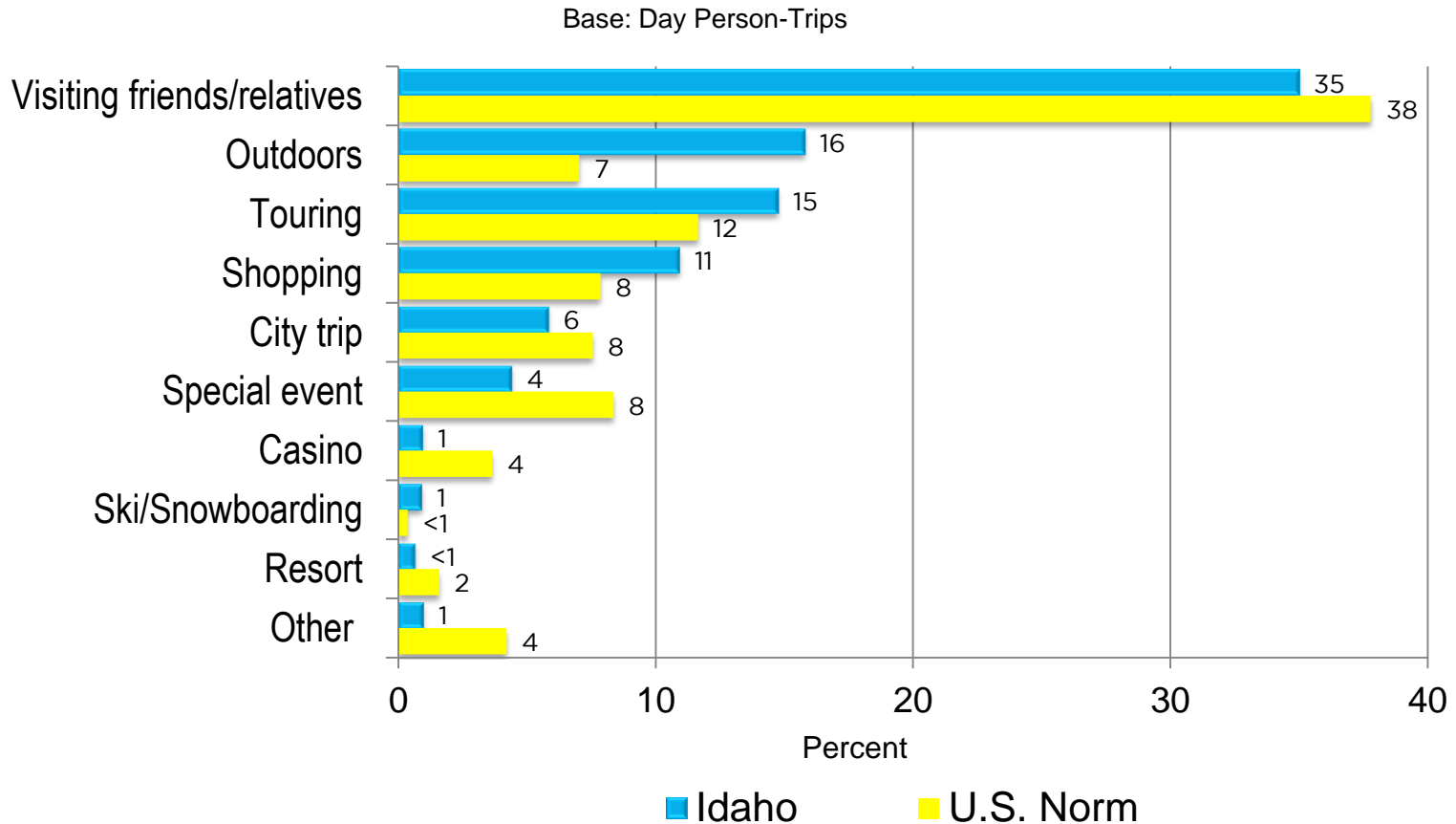


Main Purpose of Trip

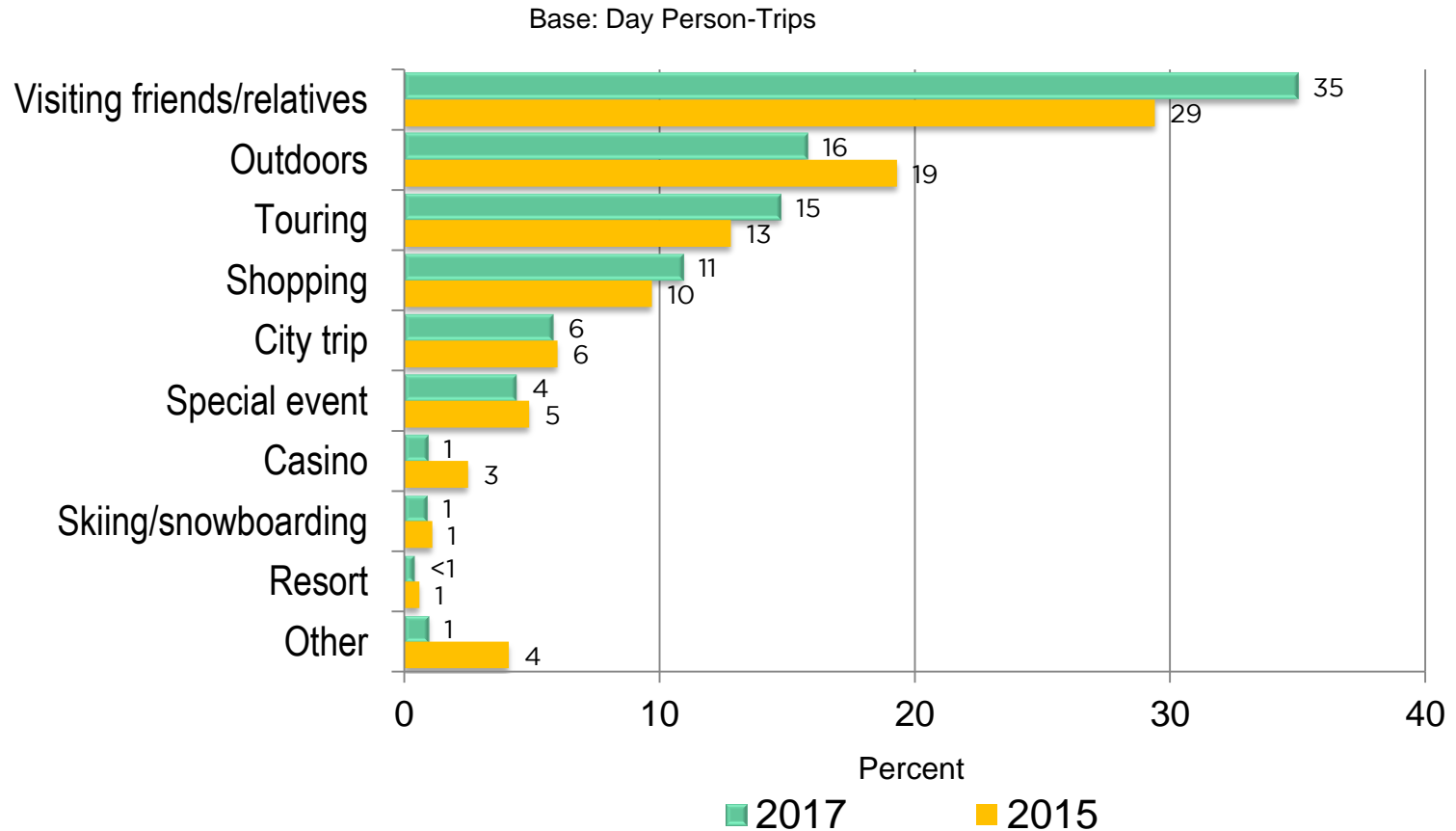
Base: Day Person-Trips



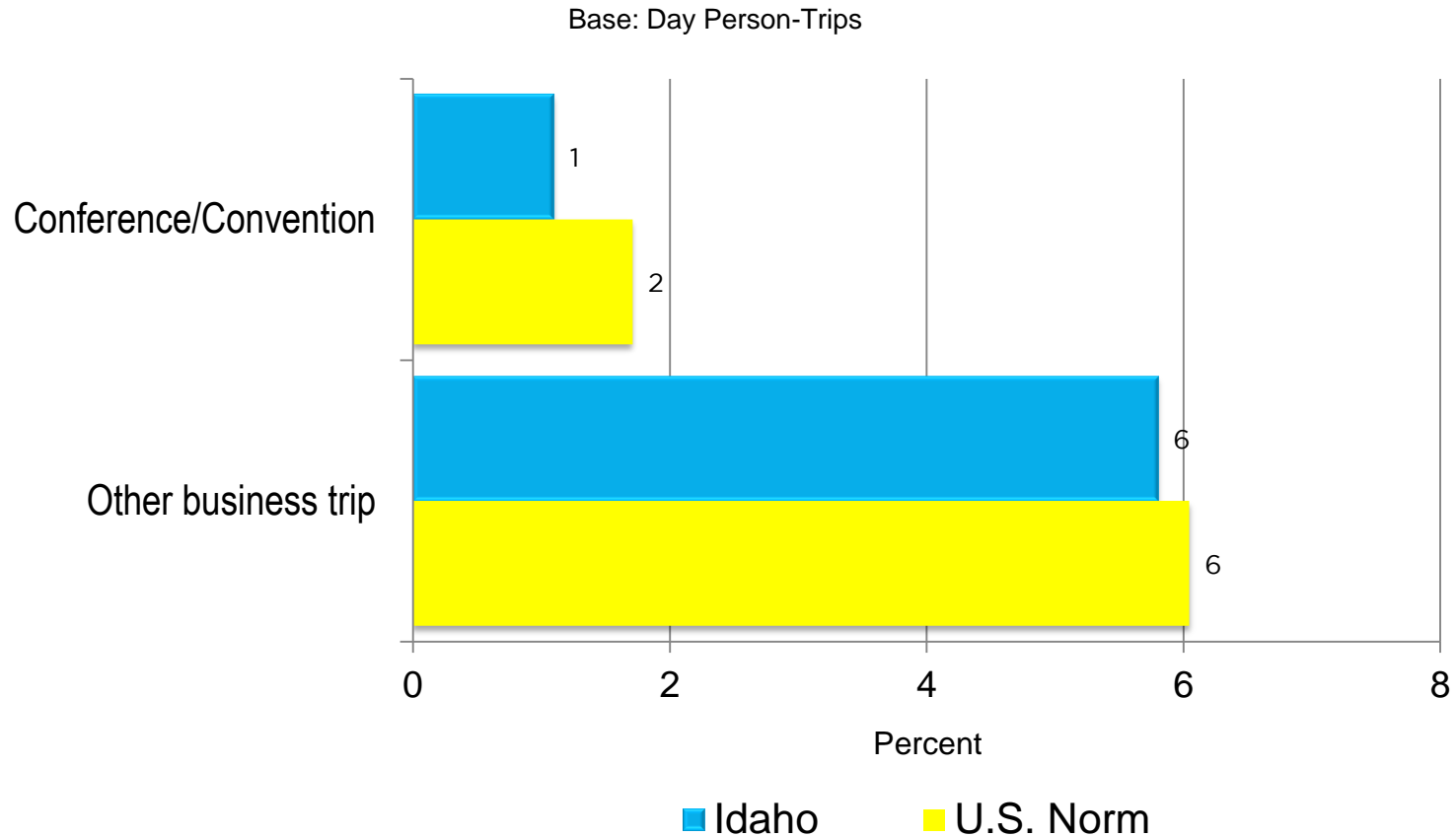
Main Purpose of Leisure Trip — Idaho vs. National Norm



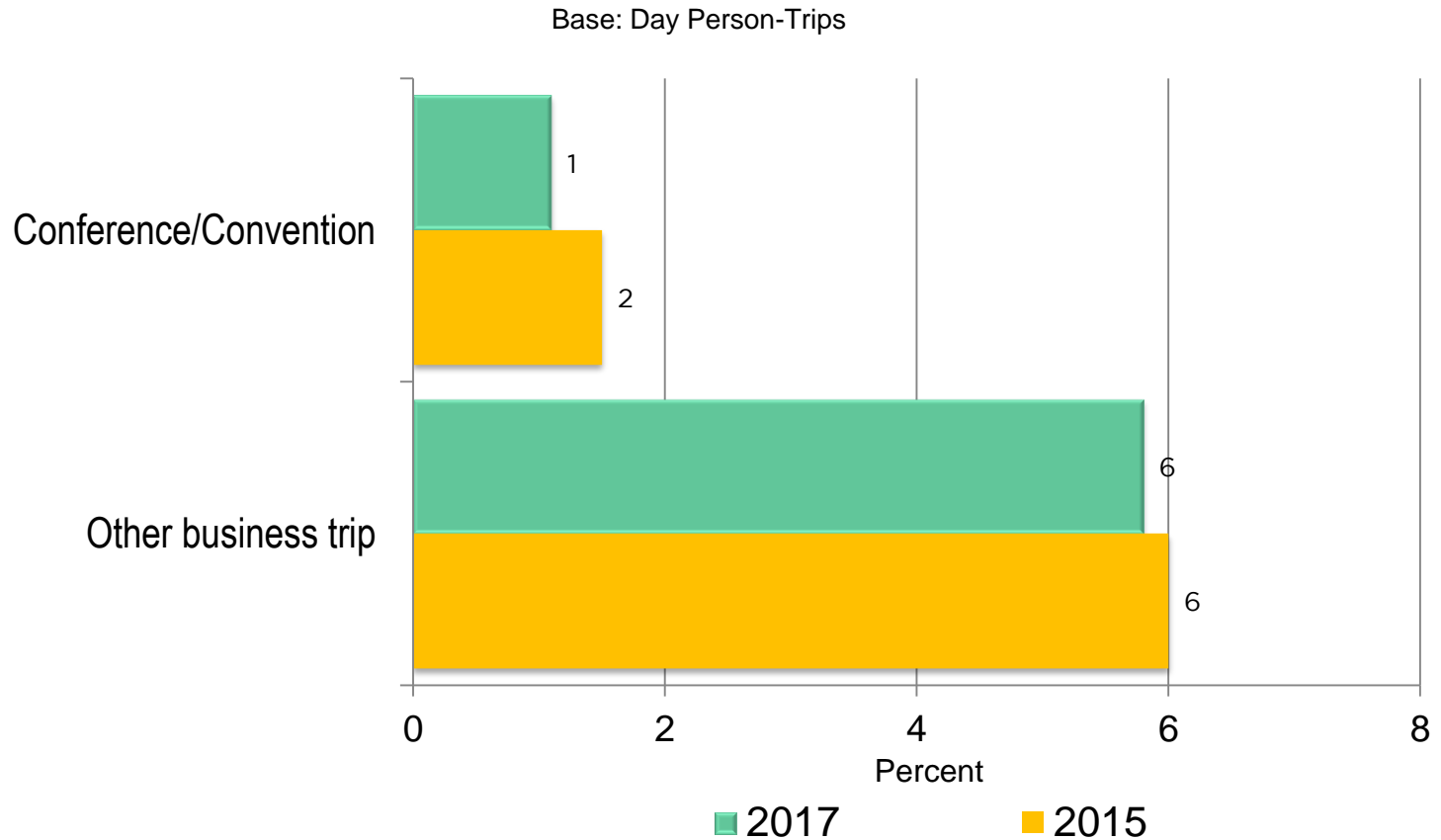
Main Purpose of Day Leisure Trip — 2017 vs. 2015



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

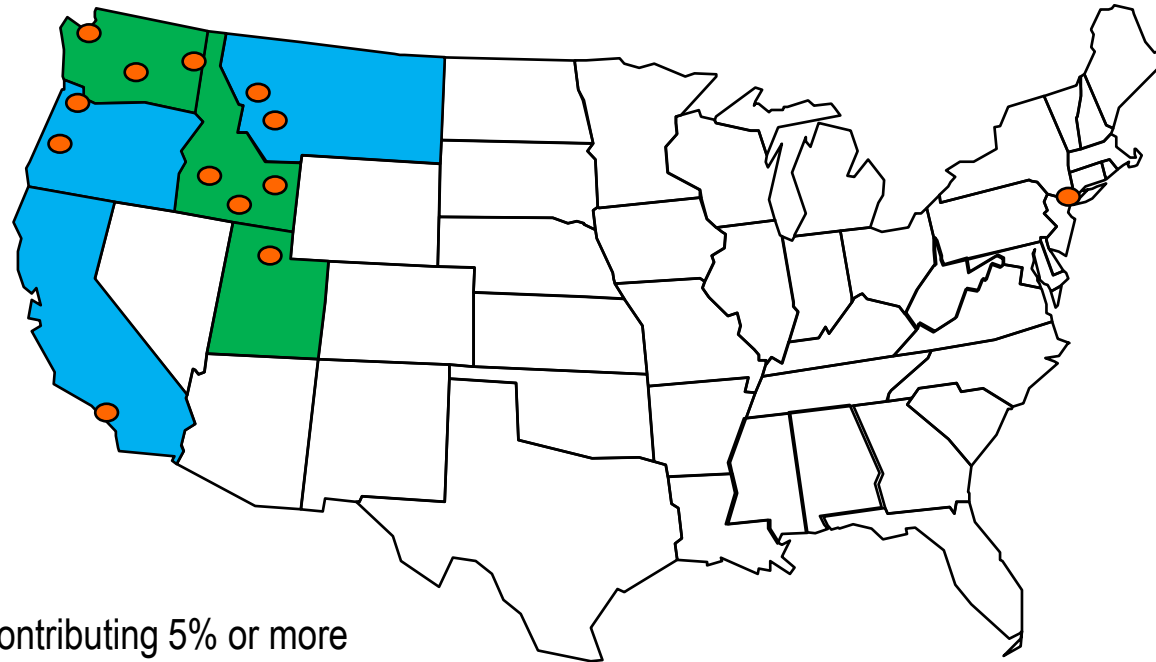


Main Purpose of Day Business Trip — 2017 vs. 2015



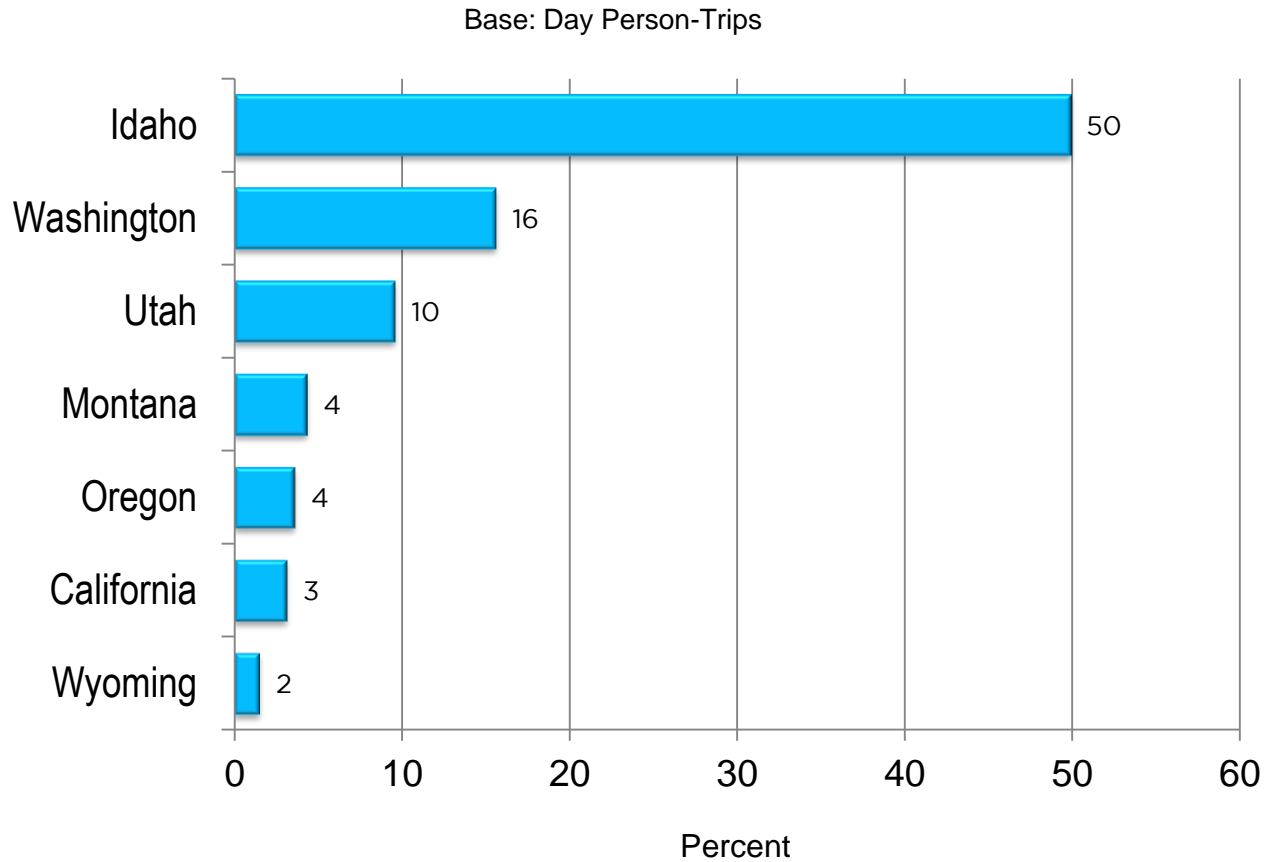
Sources of Business

Base: Day Person-Trips



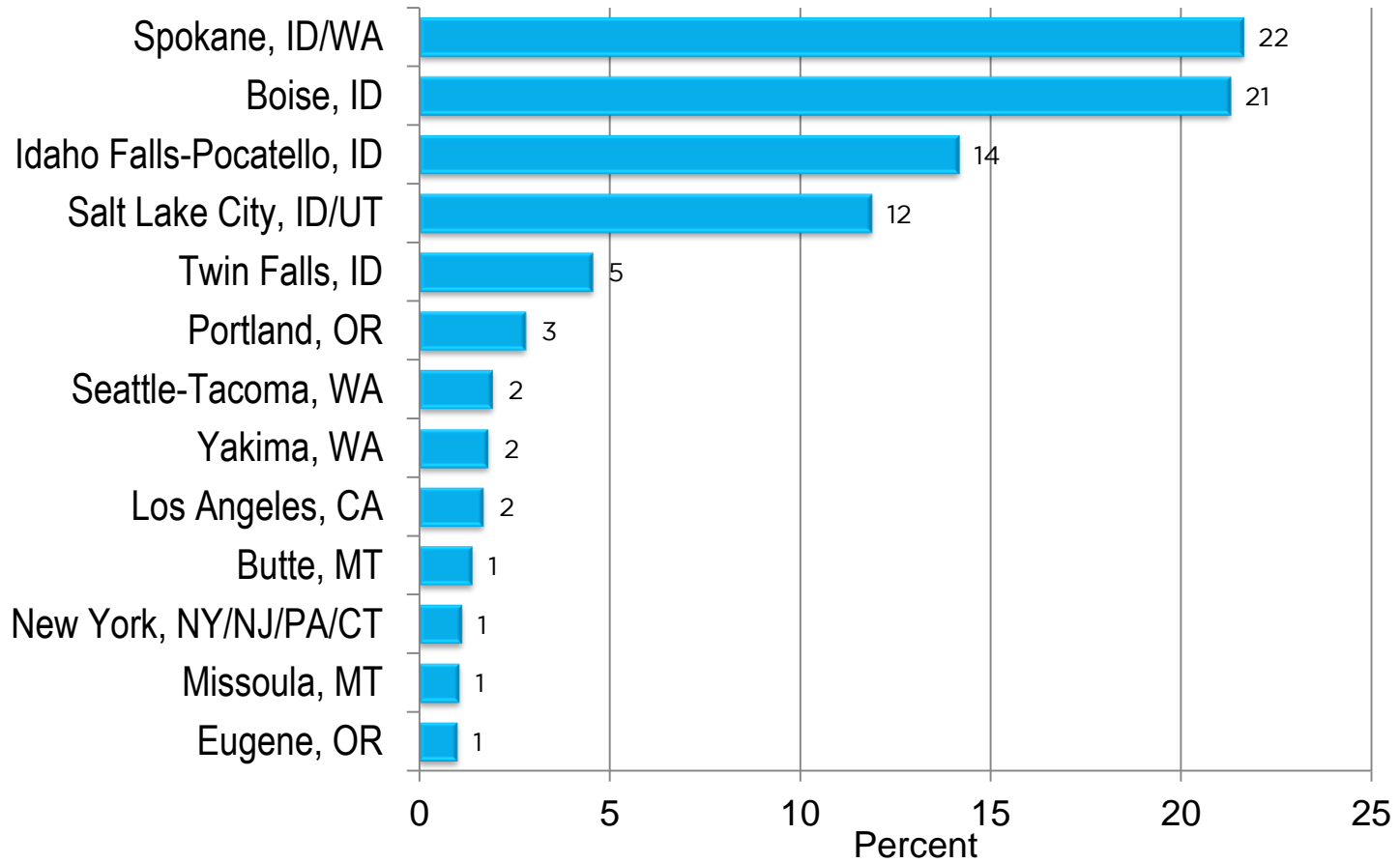
- States contributing 5% or more
- States contributing 3% - 5%
- DMA's contributing more than 2%

State Origin Of Trip

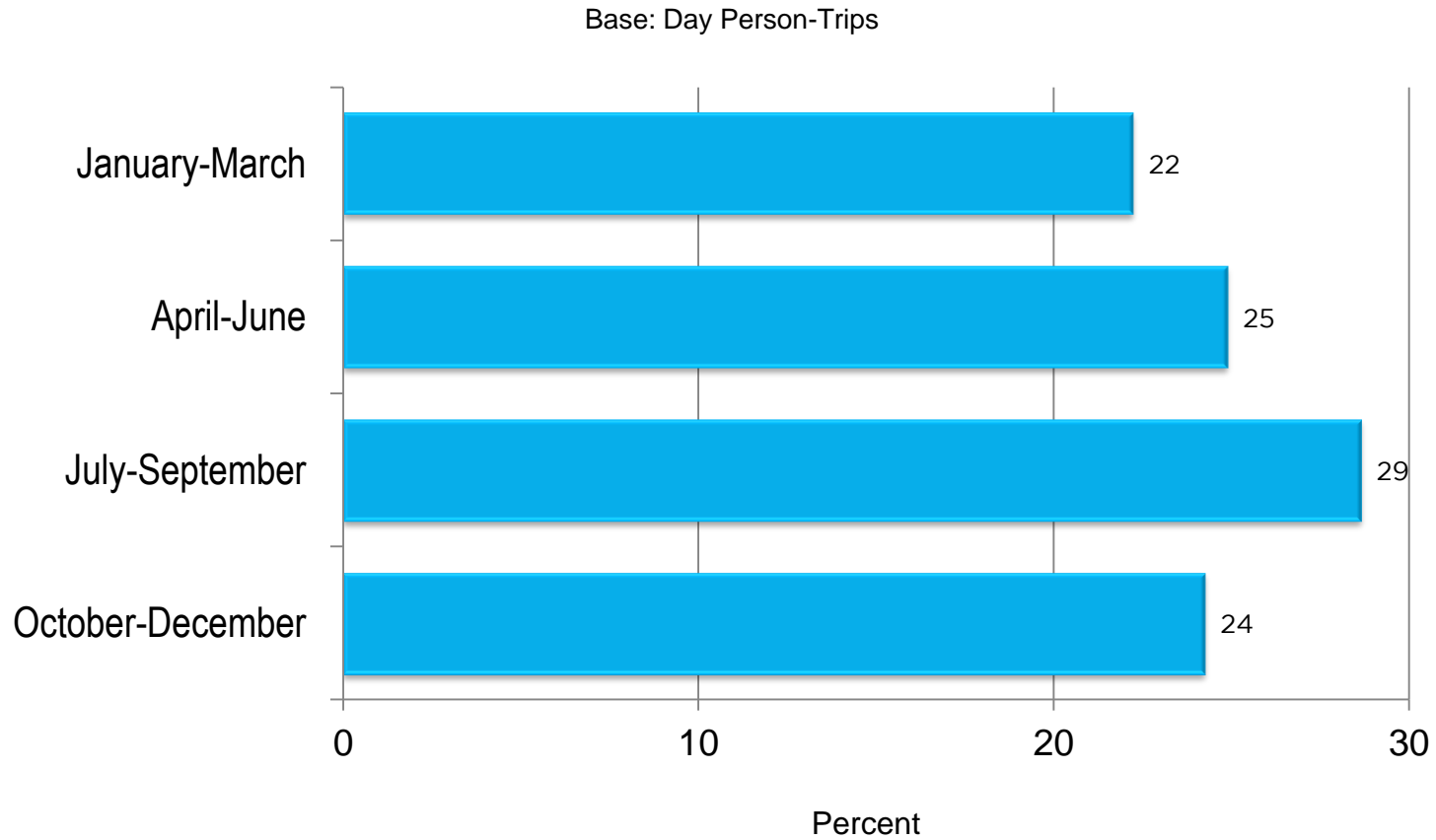


DMA Origin Of Trip

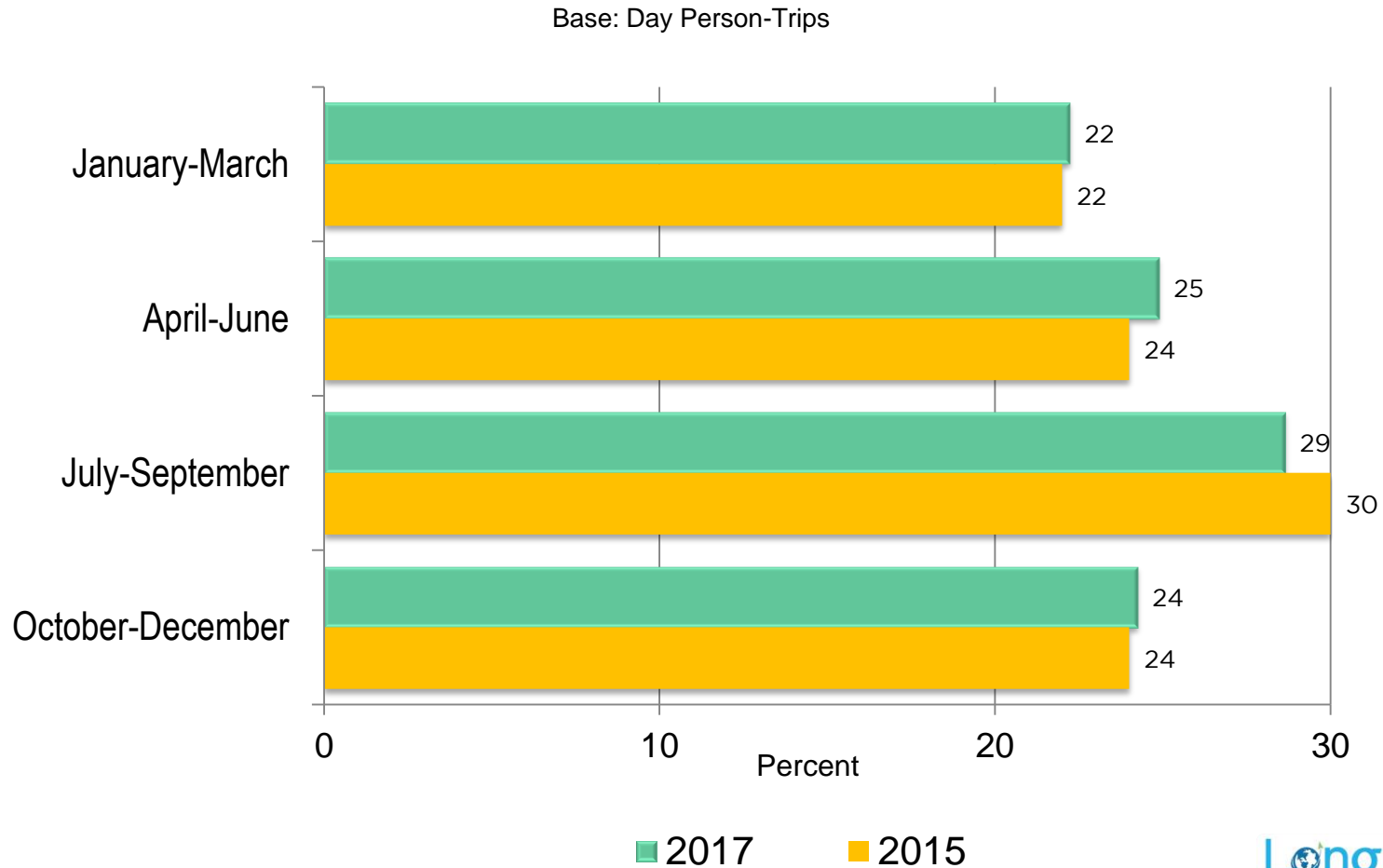
Base: Day Person-Trips



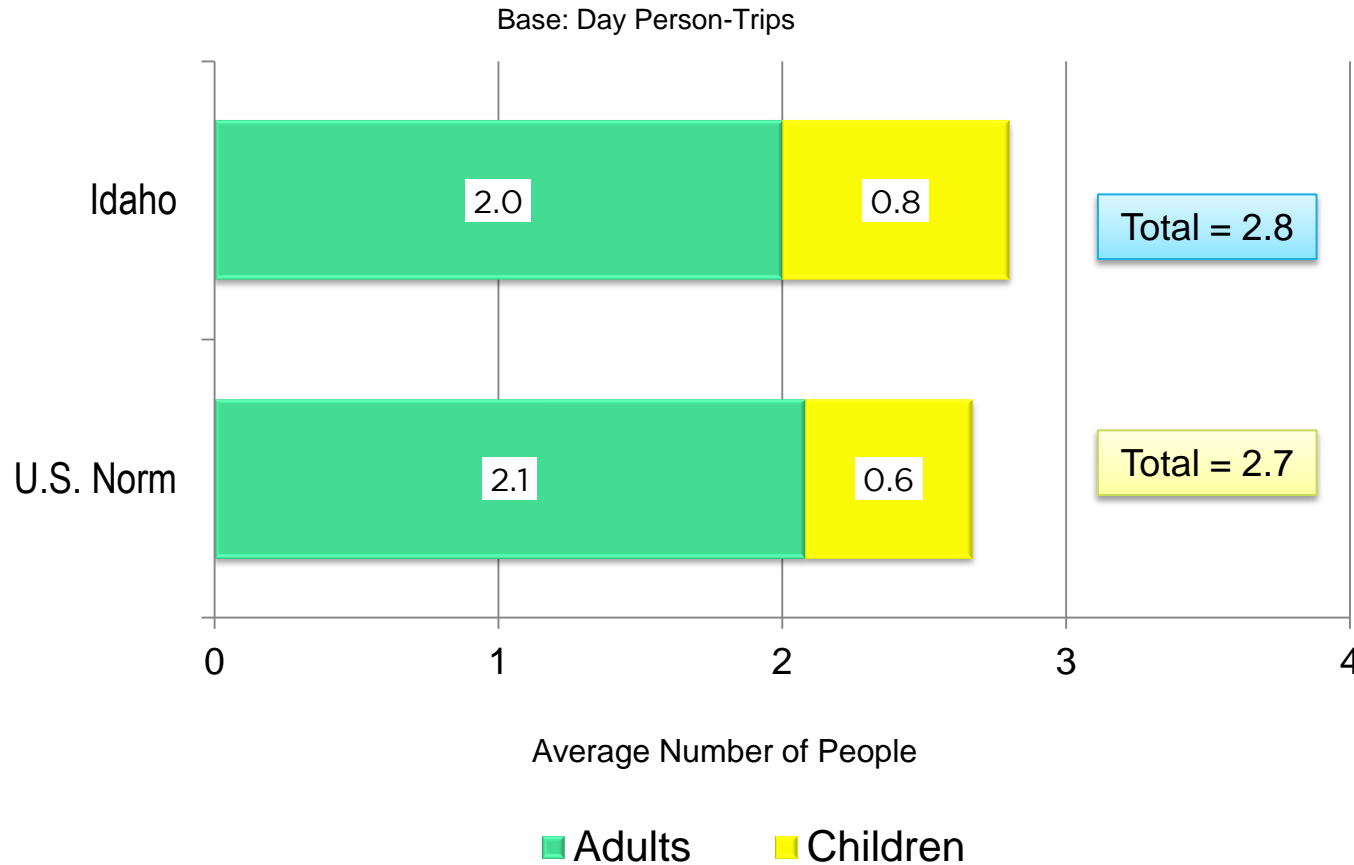
Season of Trip



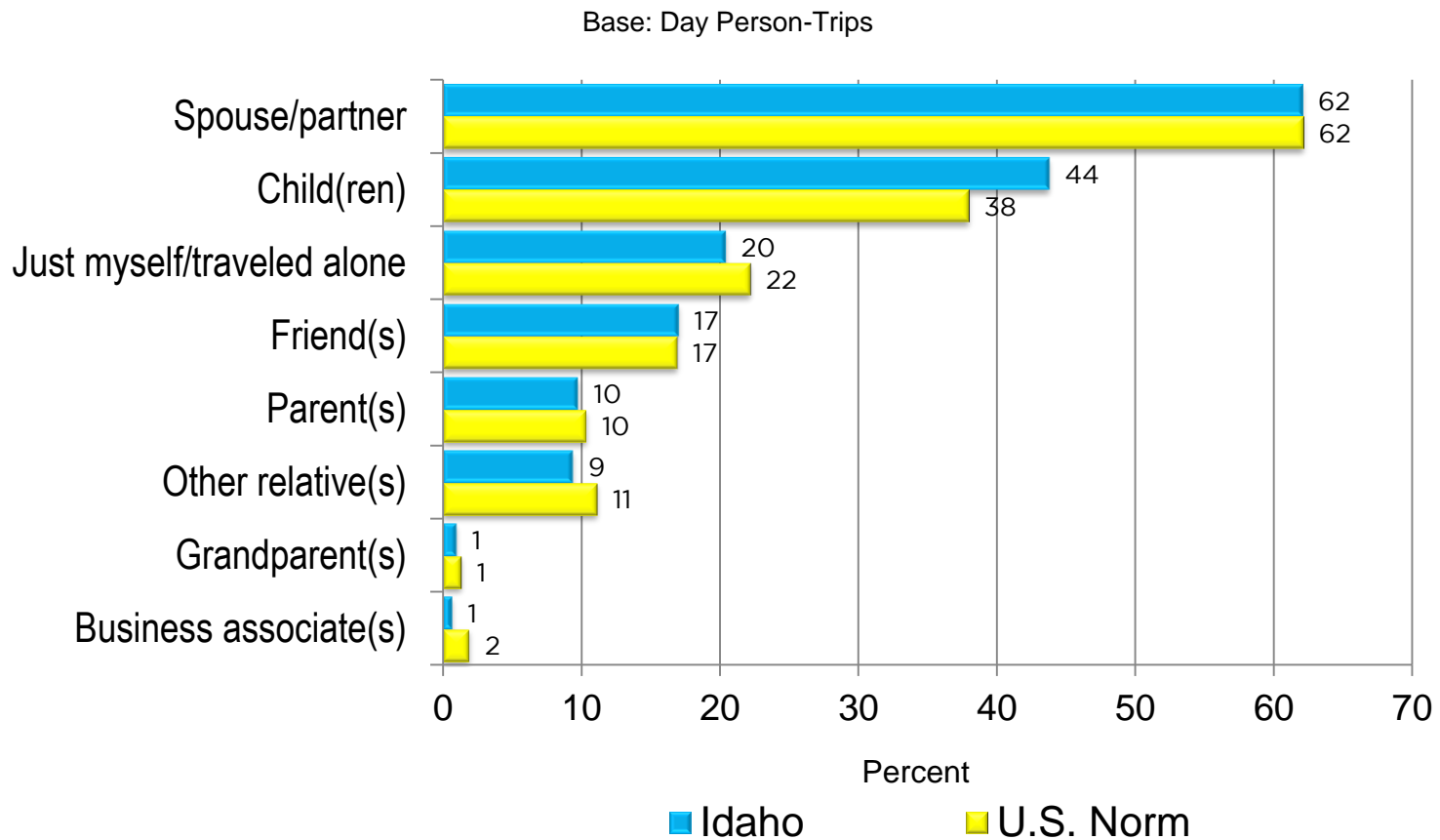
Season of Trip—2015 vs. 2017



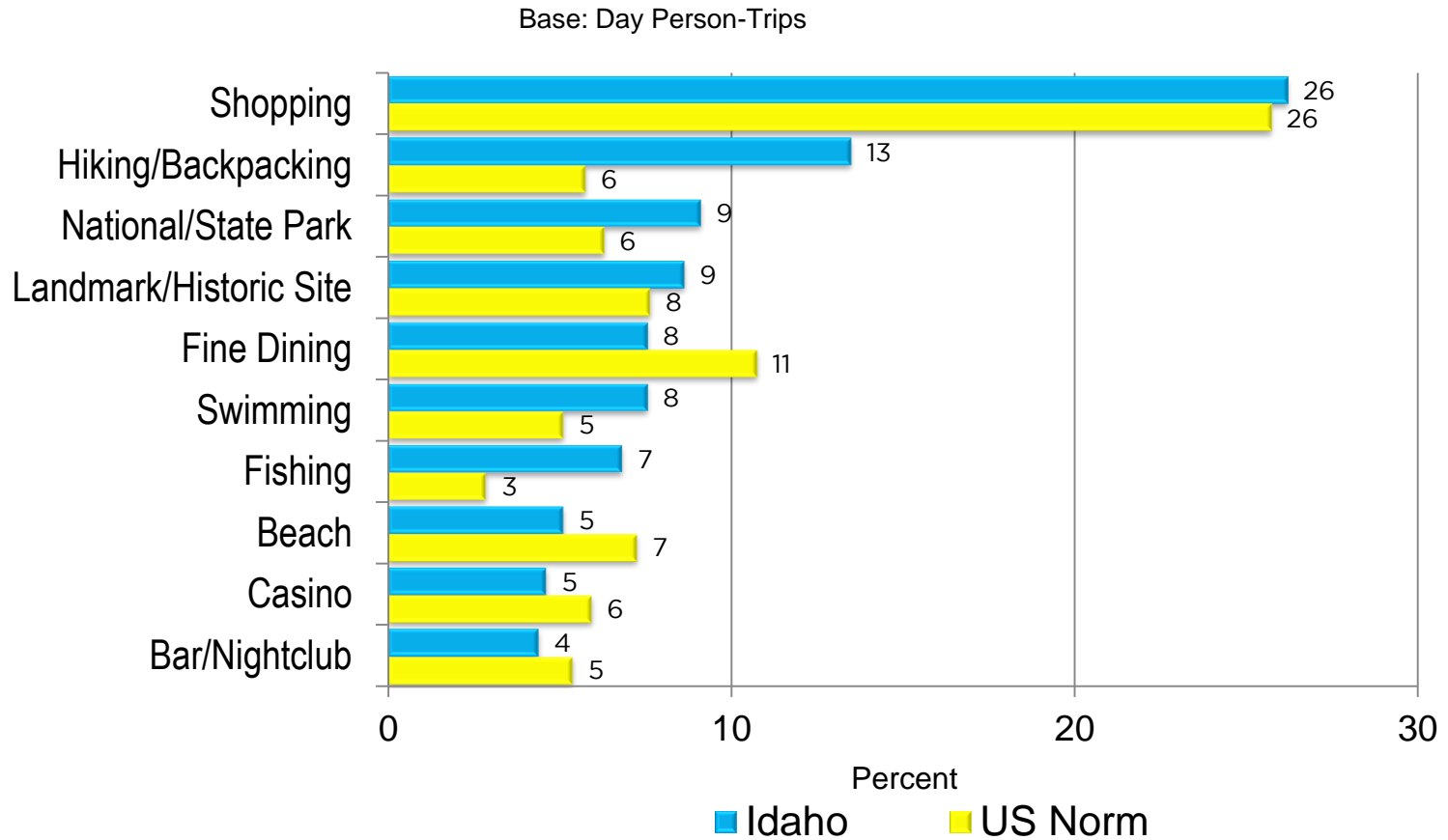
Size of Travel Party



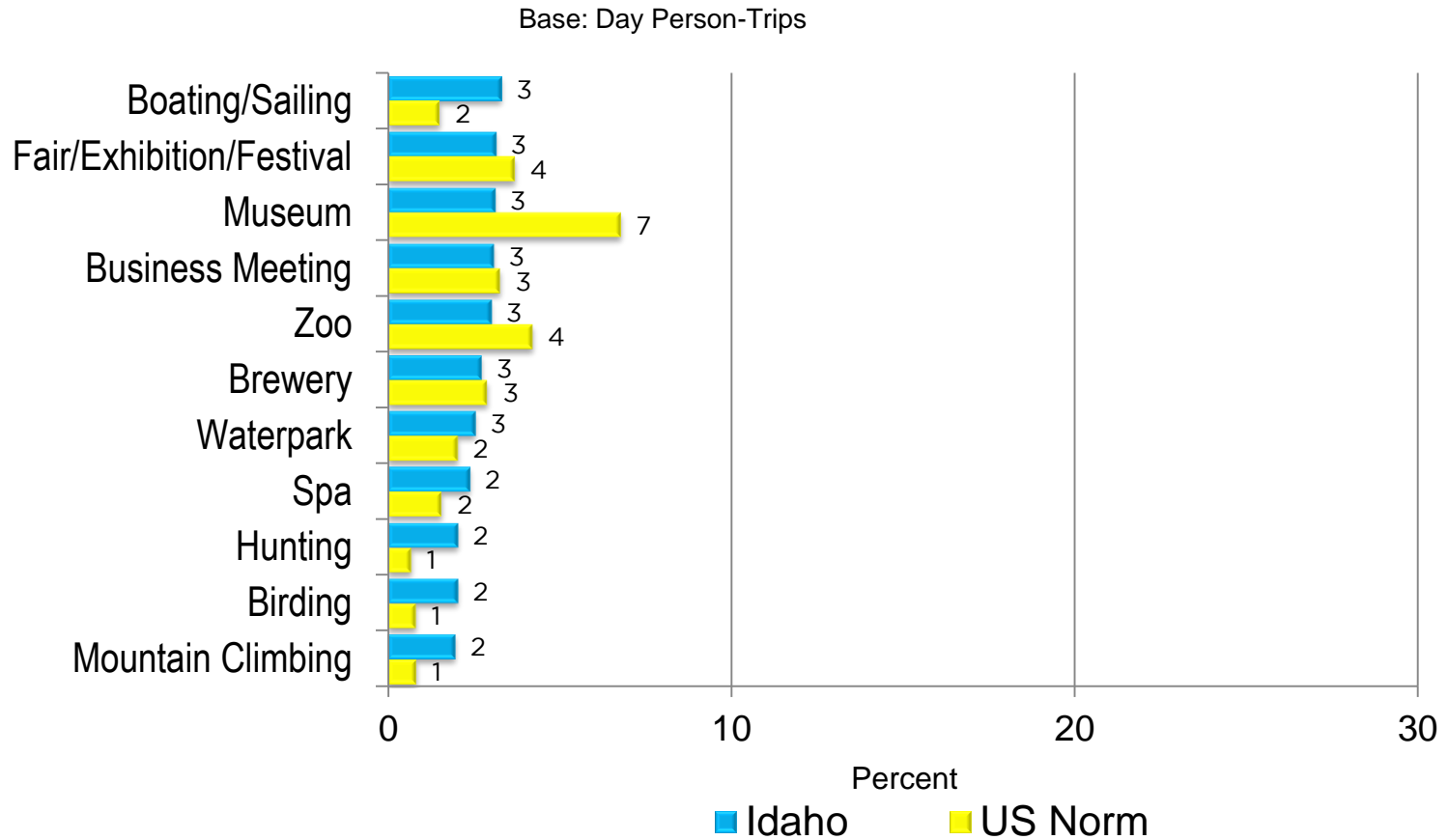
Composition of Immediate Travel Party



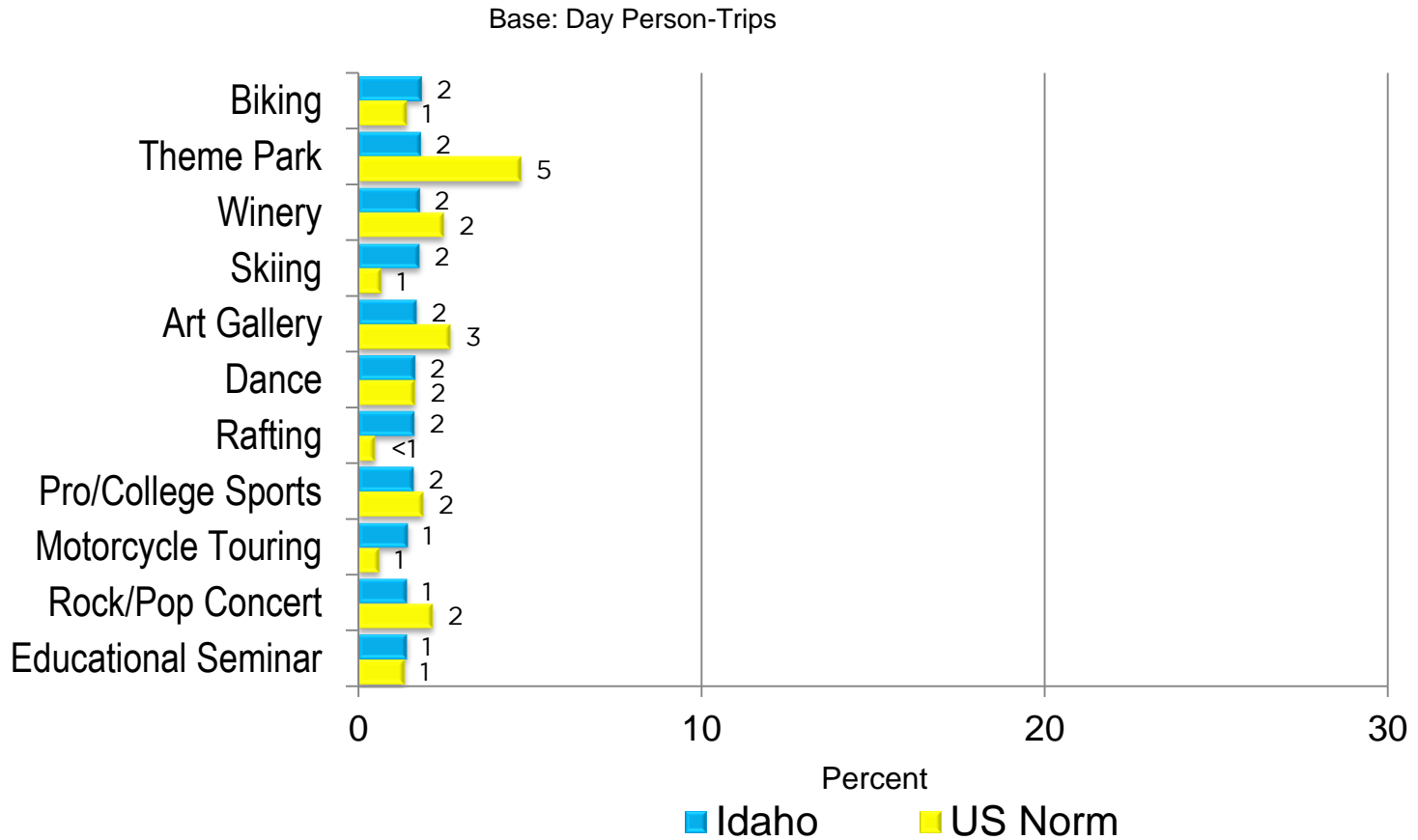
Activities and Experiences



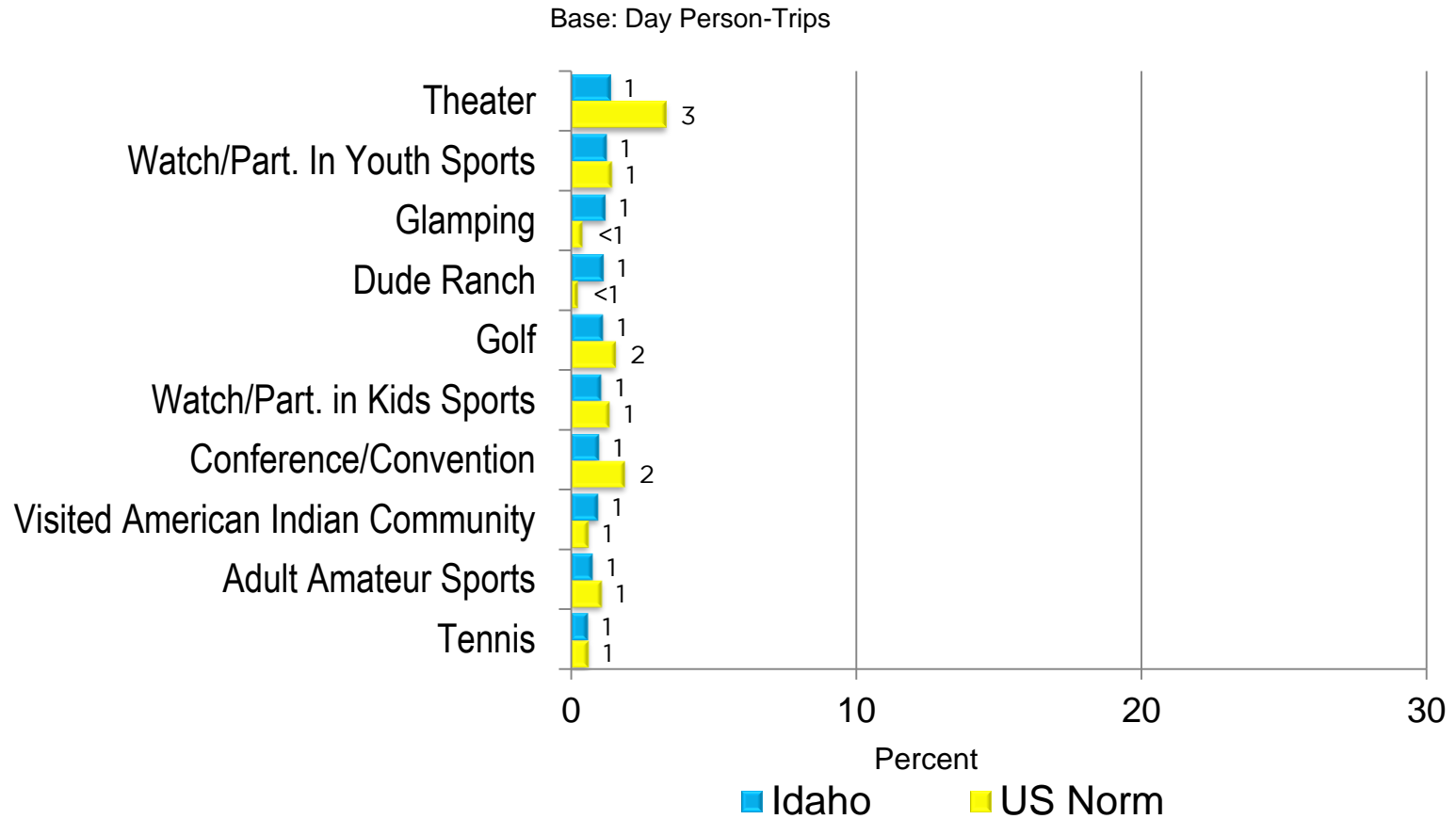
Activities and Experiences (Cont'd)



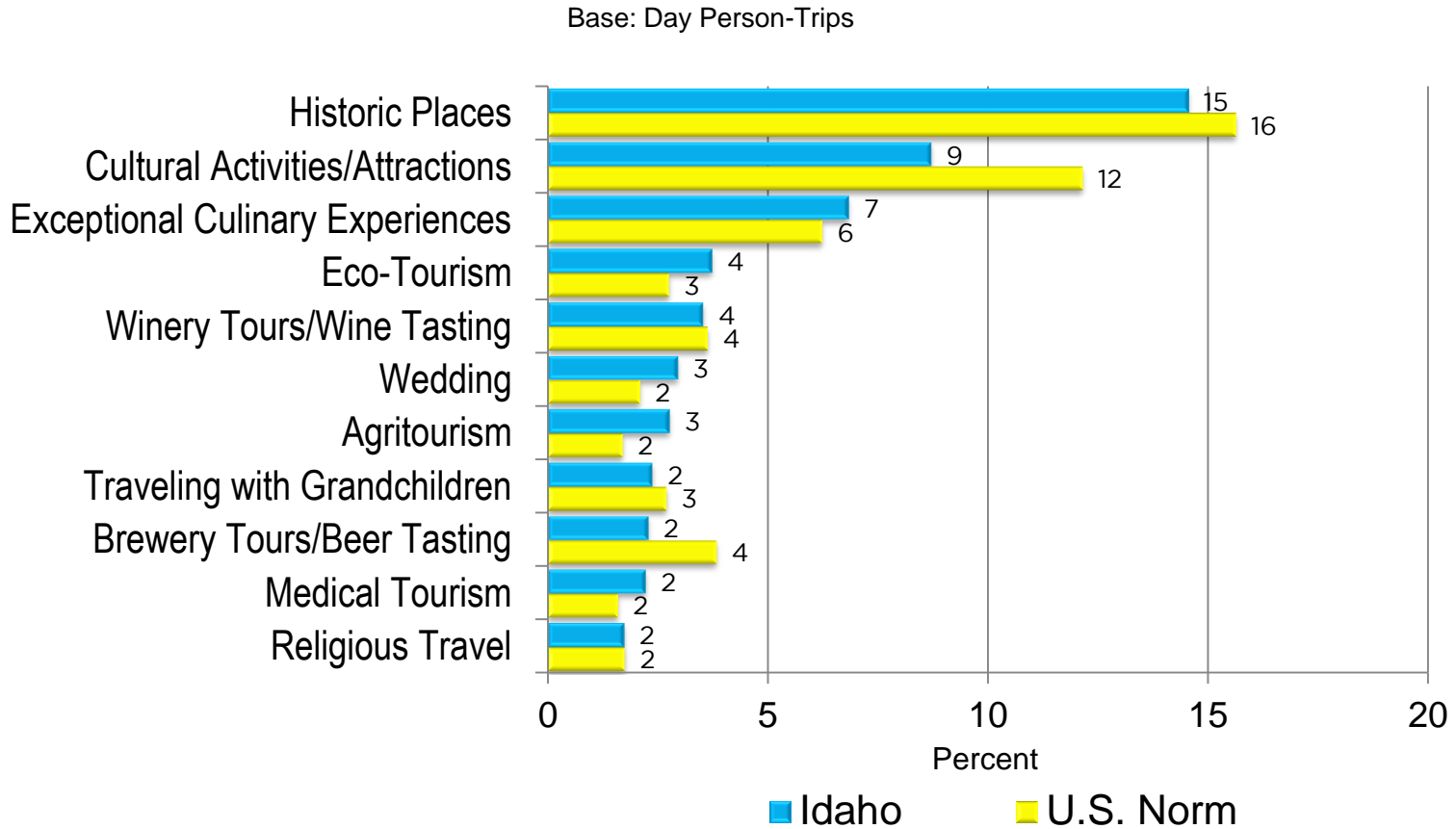
Activities and Experiences (Cont'd)



Activities and Experiences (Cont'd)

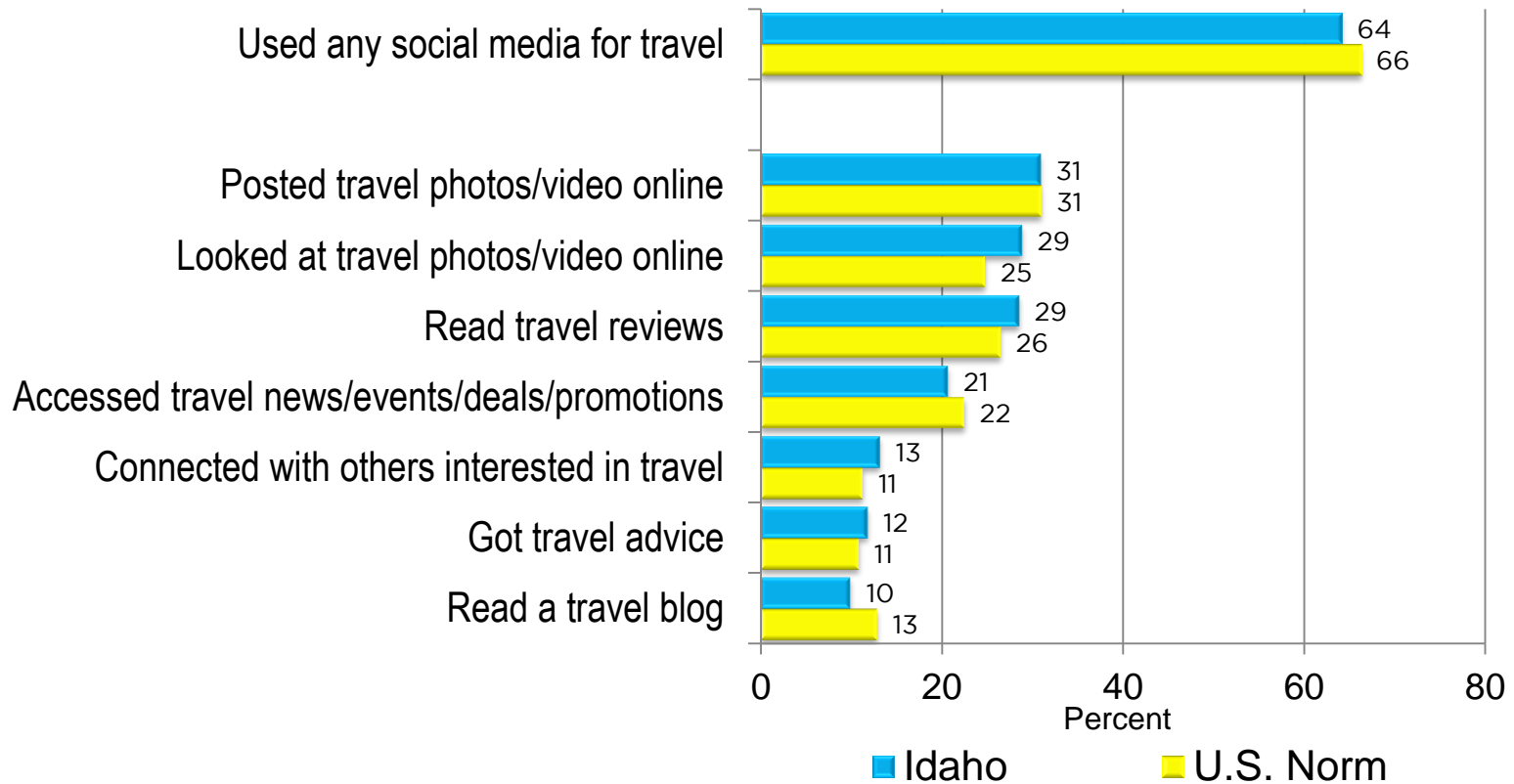


Activities of Special Interest

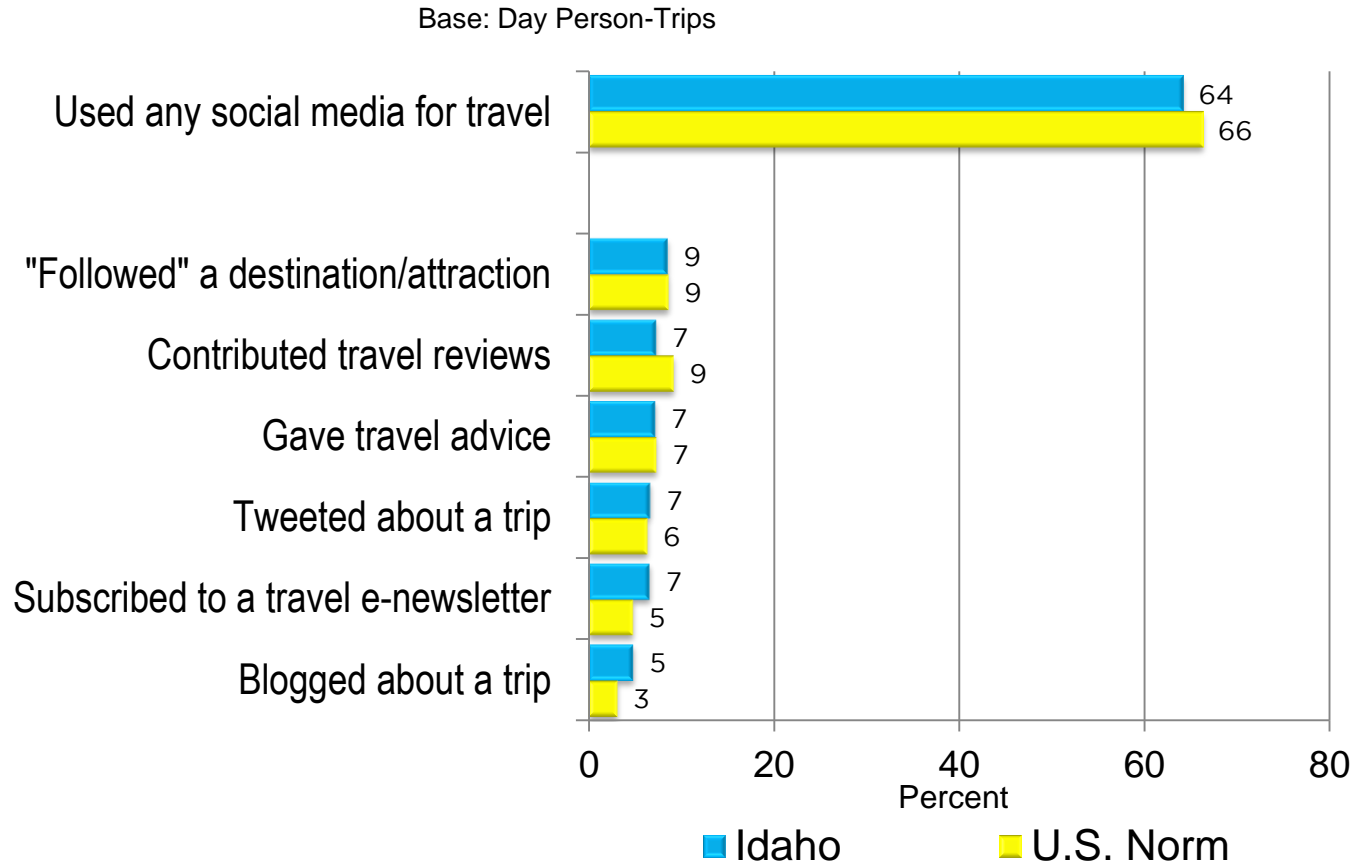


Online Social Media Use by Travelers

Base: Day Person-Trips

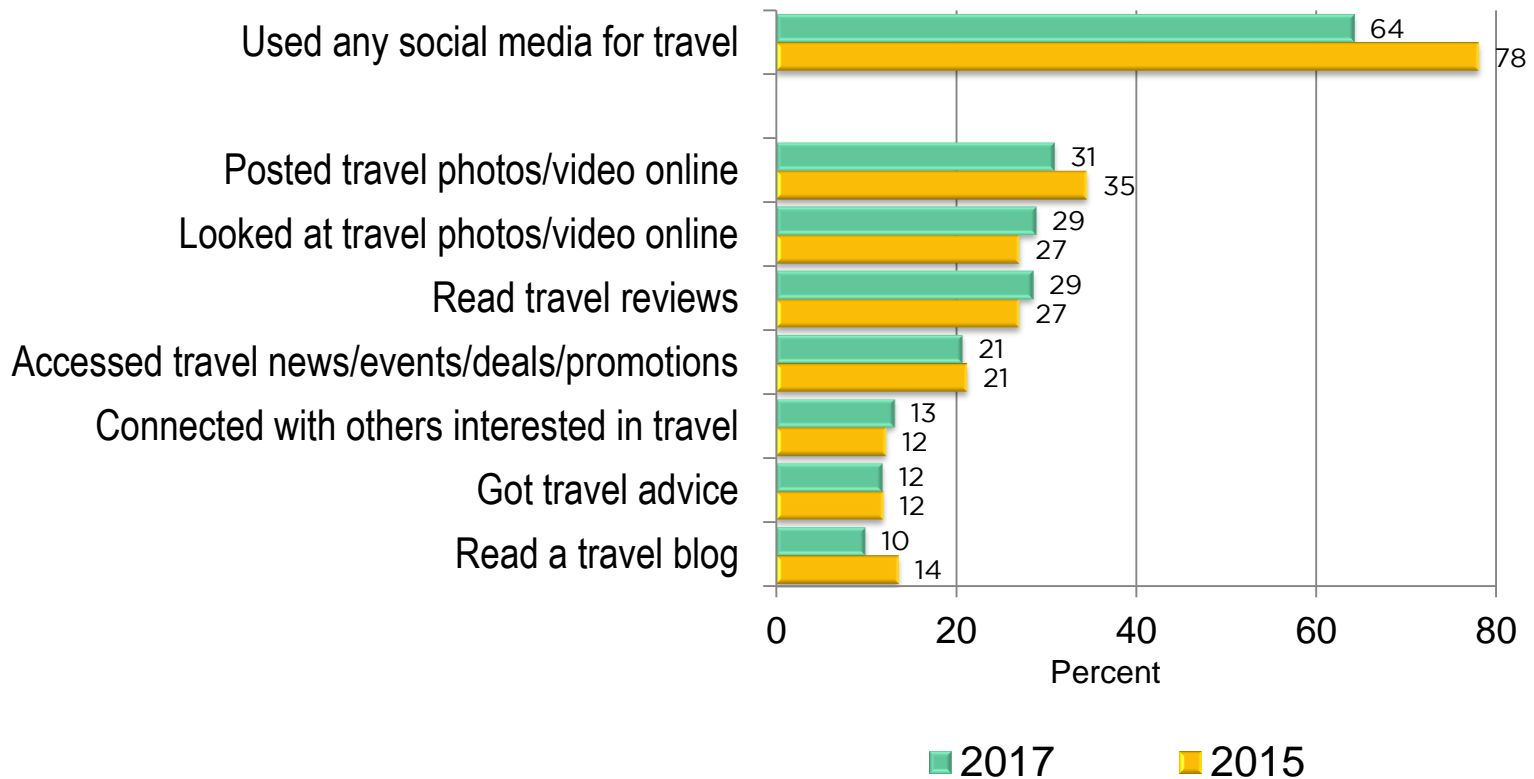


Online Social Media Use by Travelers (Cont'd)



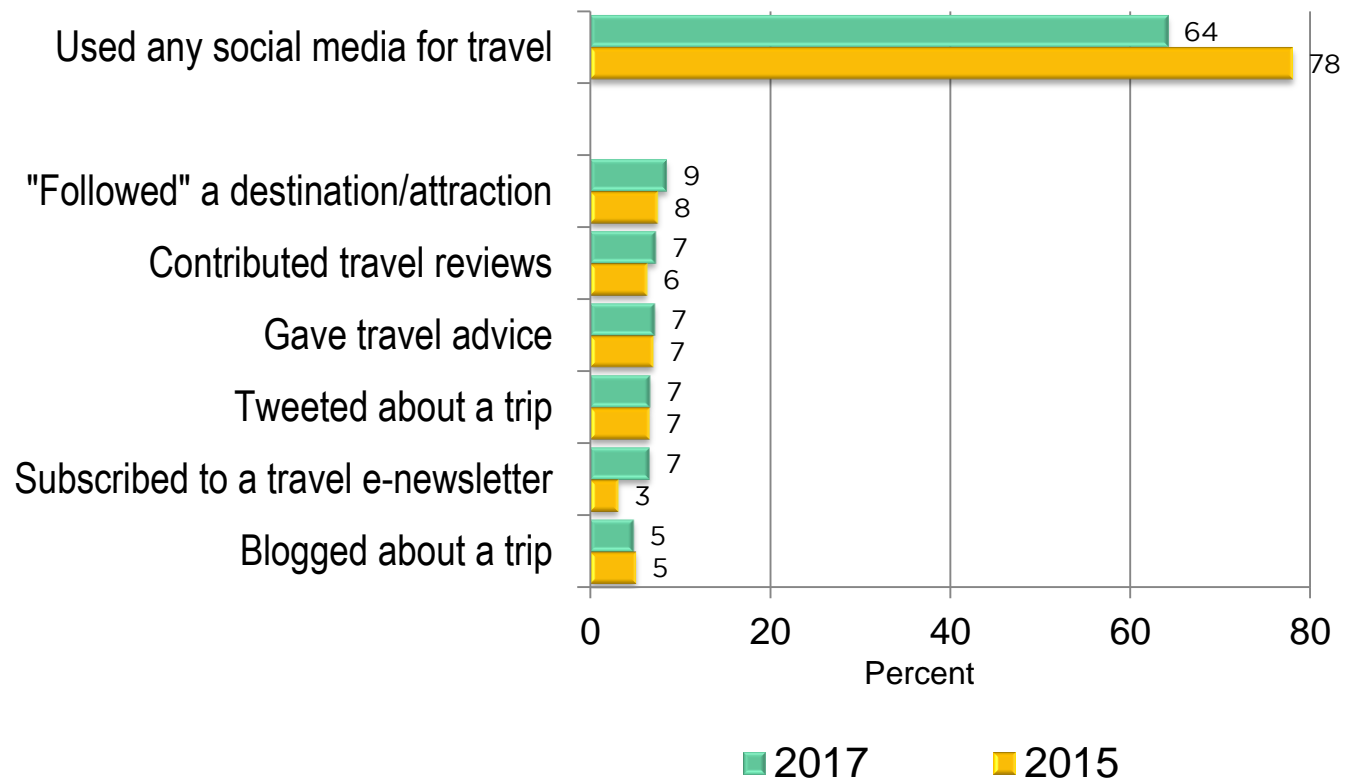
Online Social Media Use by Travelers – 2017 vs. 2015

Base: Day Person-Trips

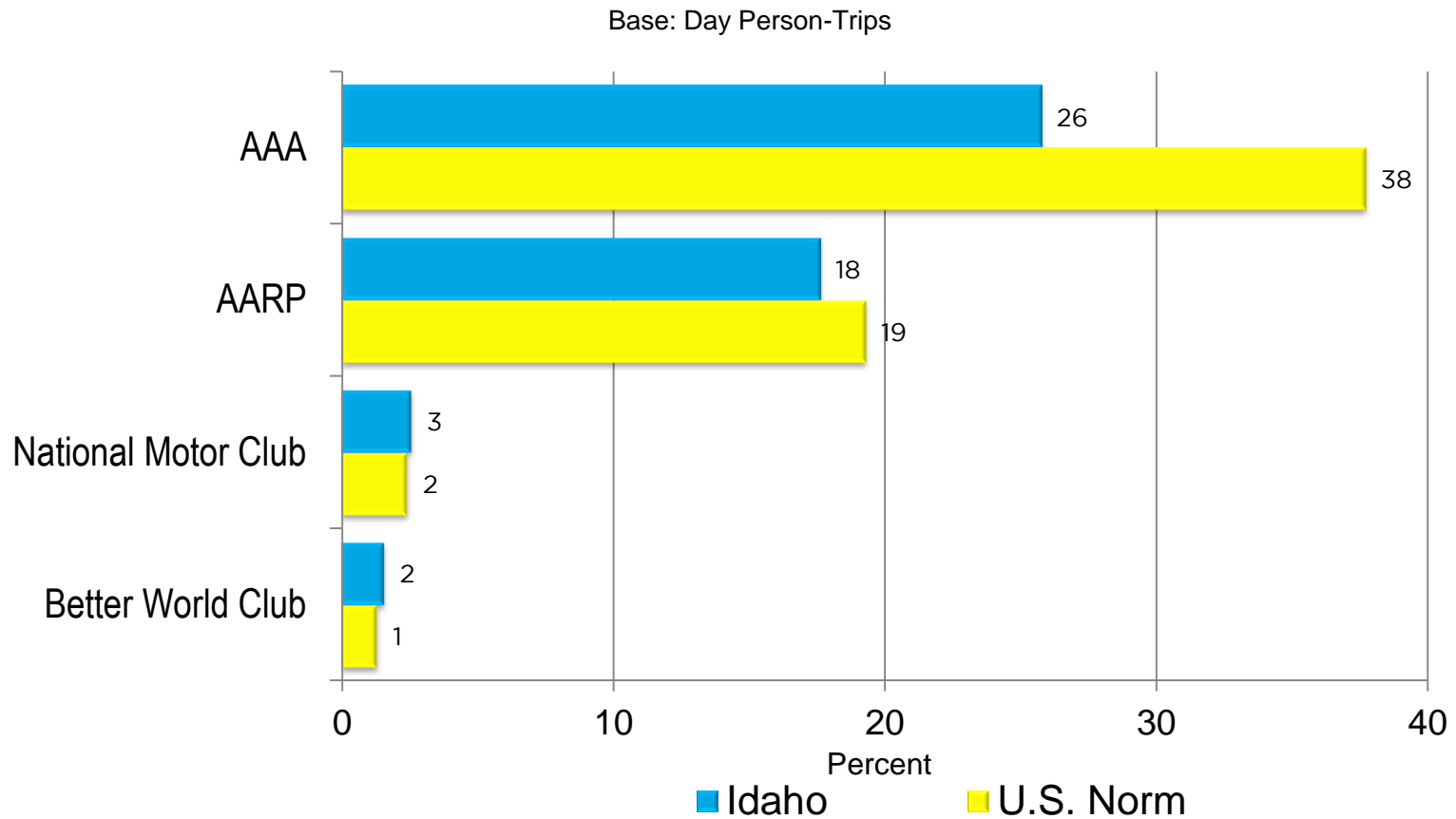


Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)

Base: Day Person-Trips



Organization Membership

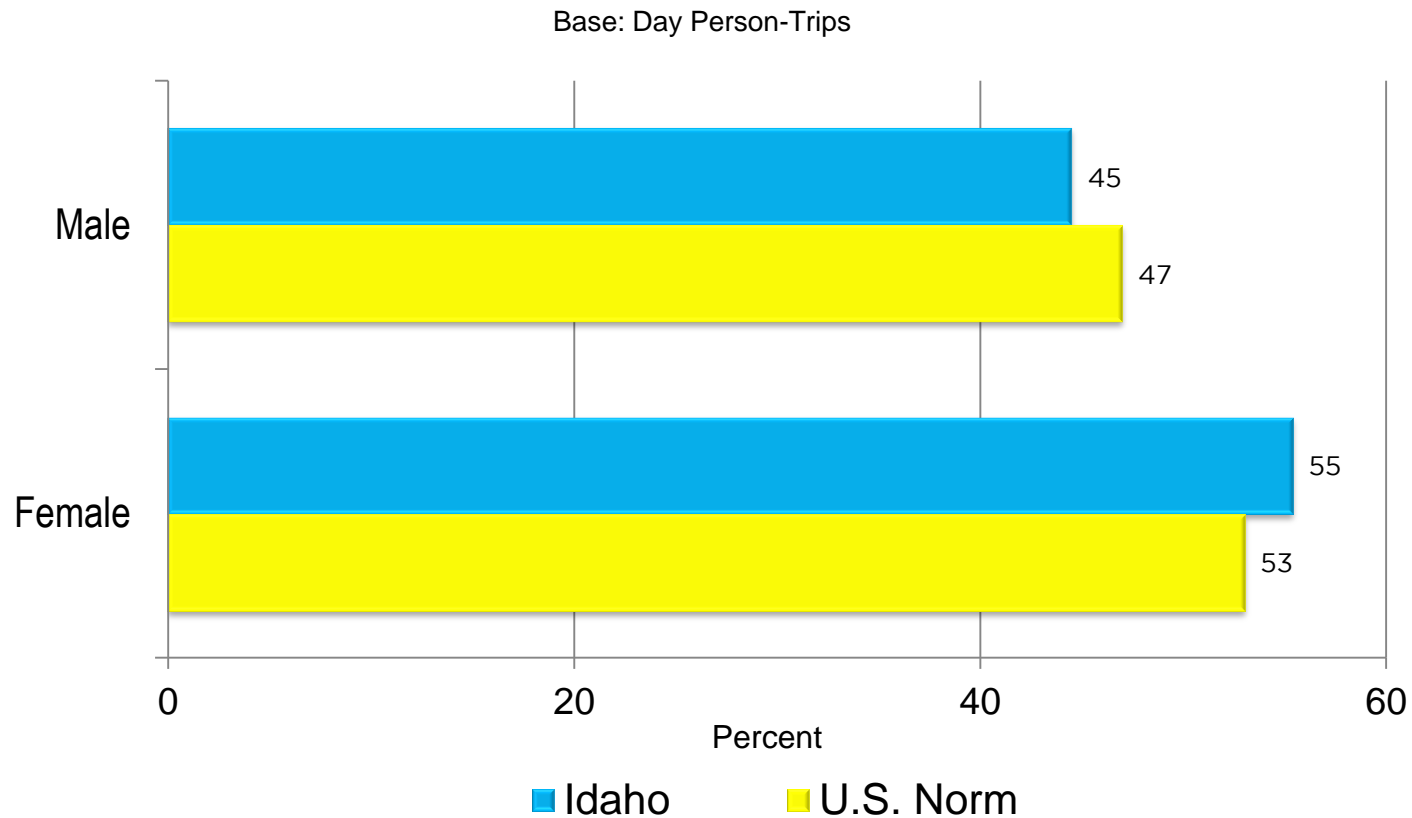




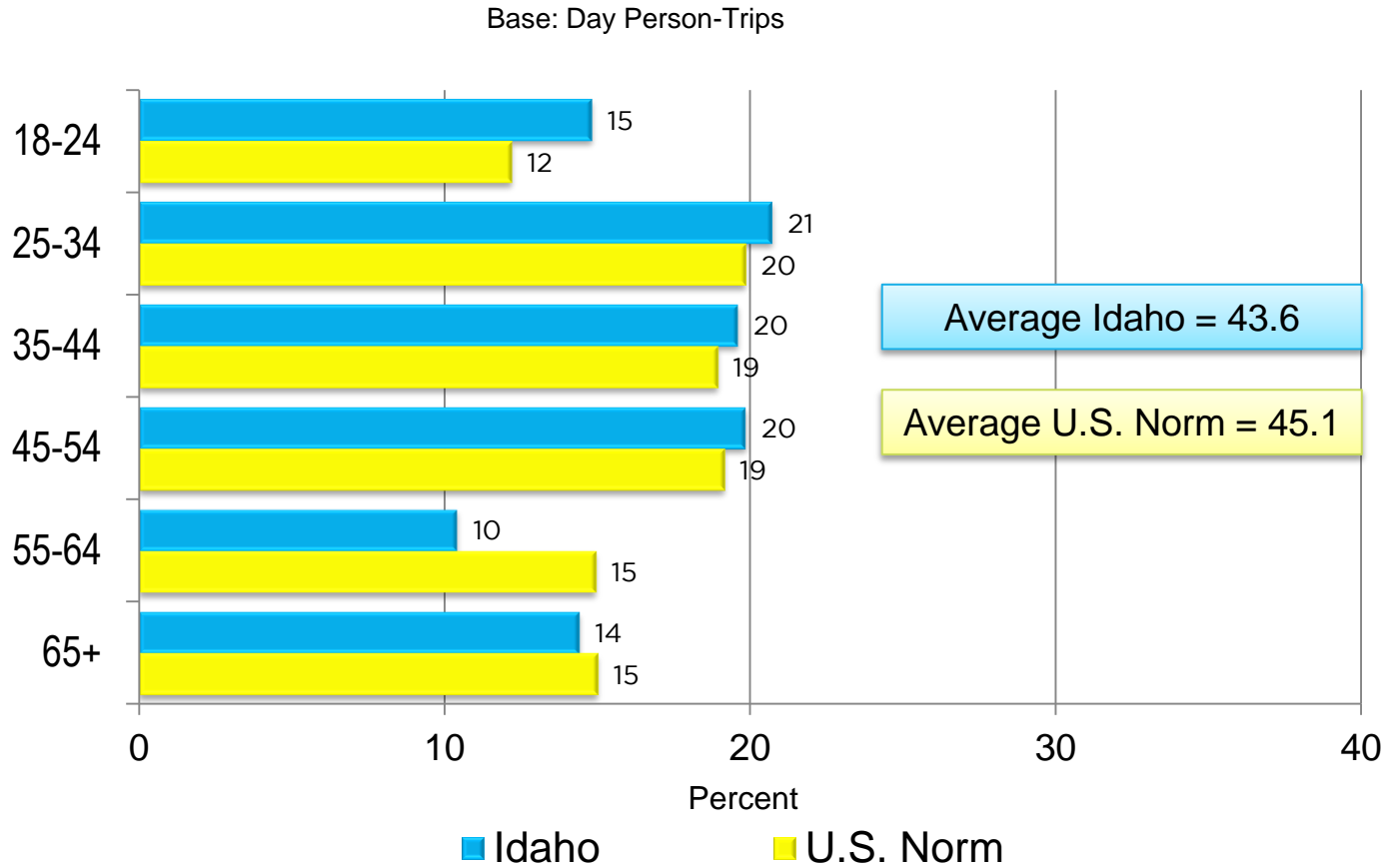
Demographic Profile of Day Visitors



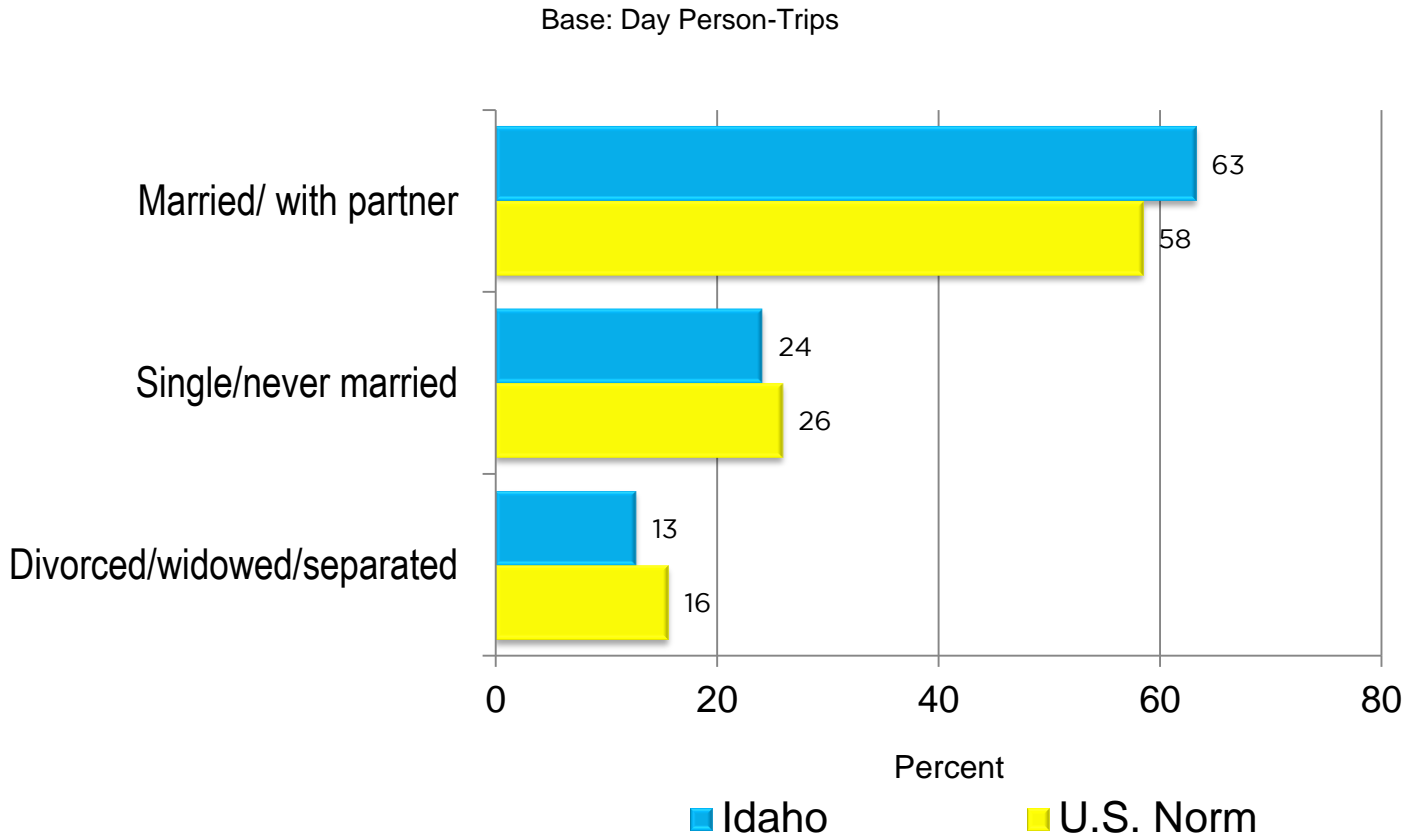
Gender



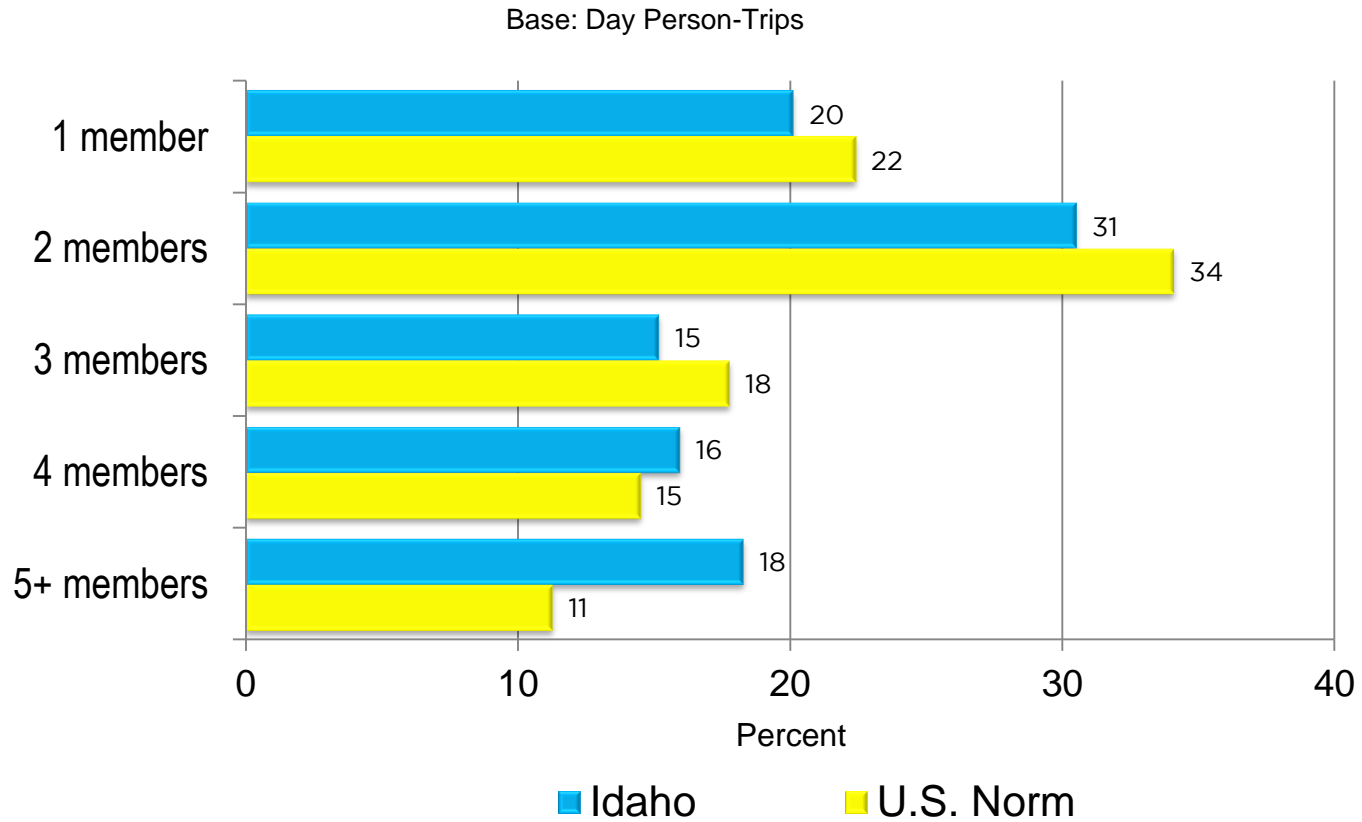
Age



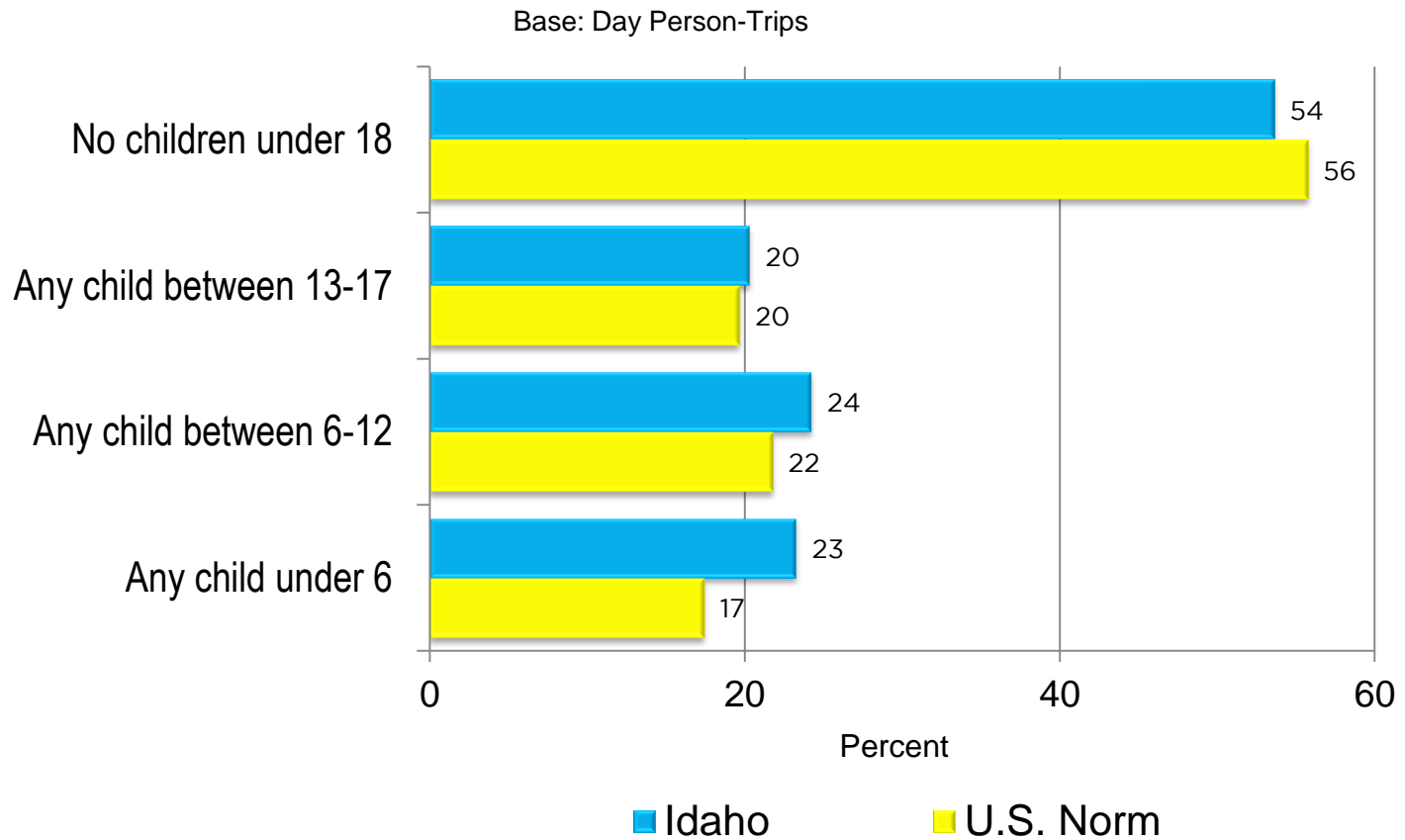
Marital Status



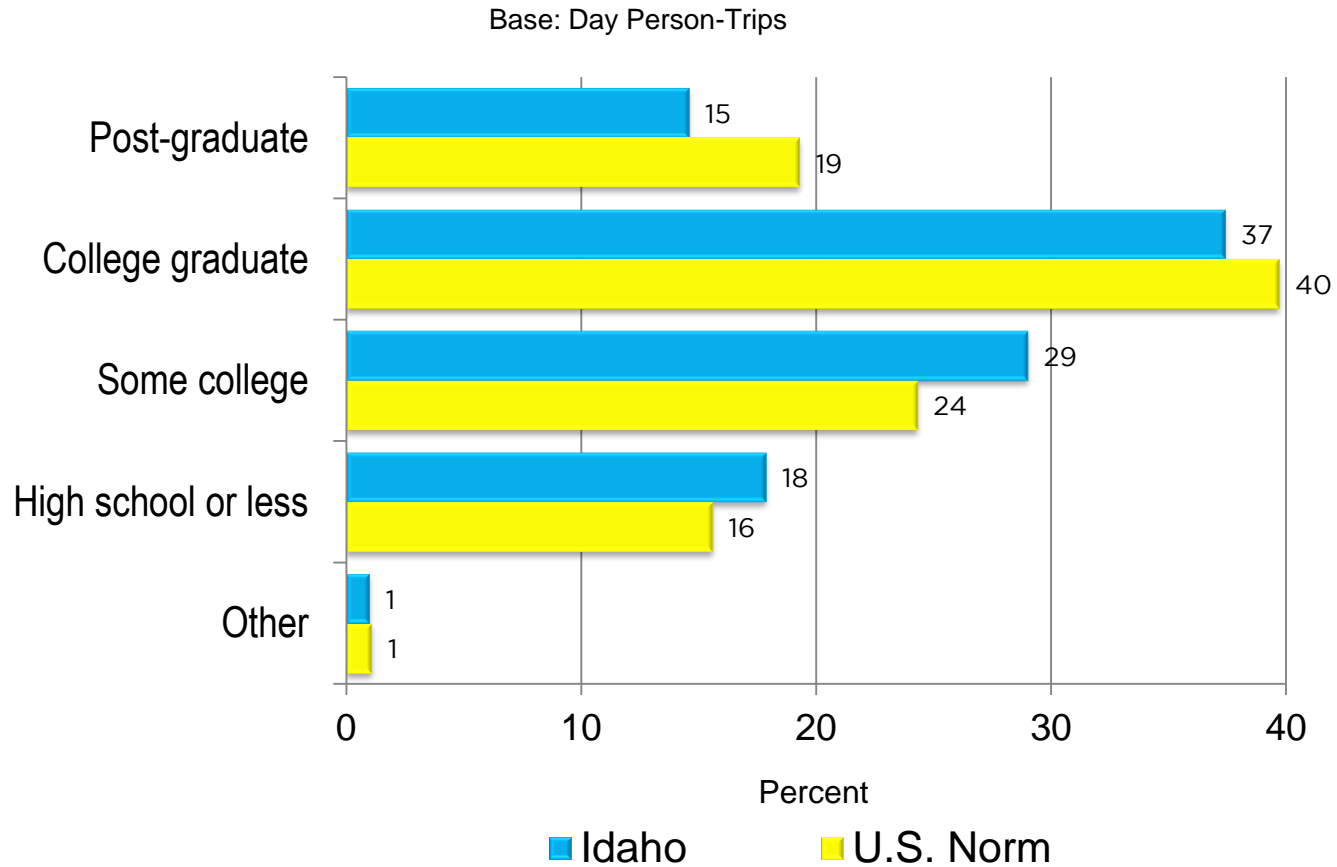
Household Size



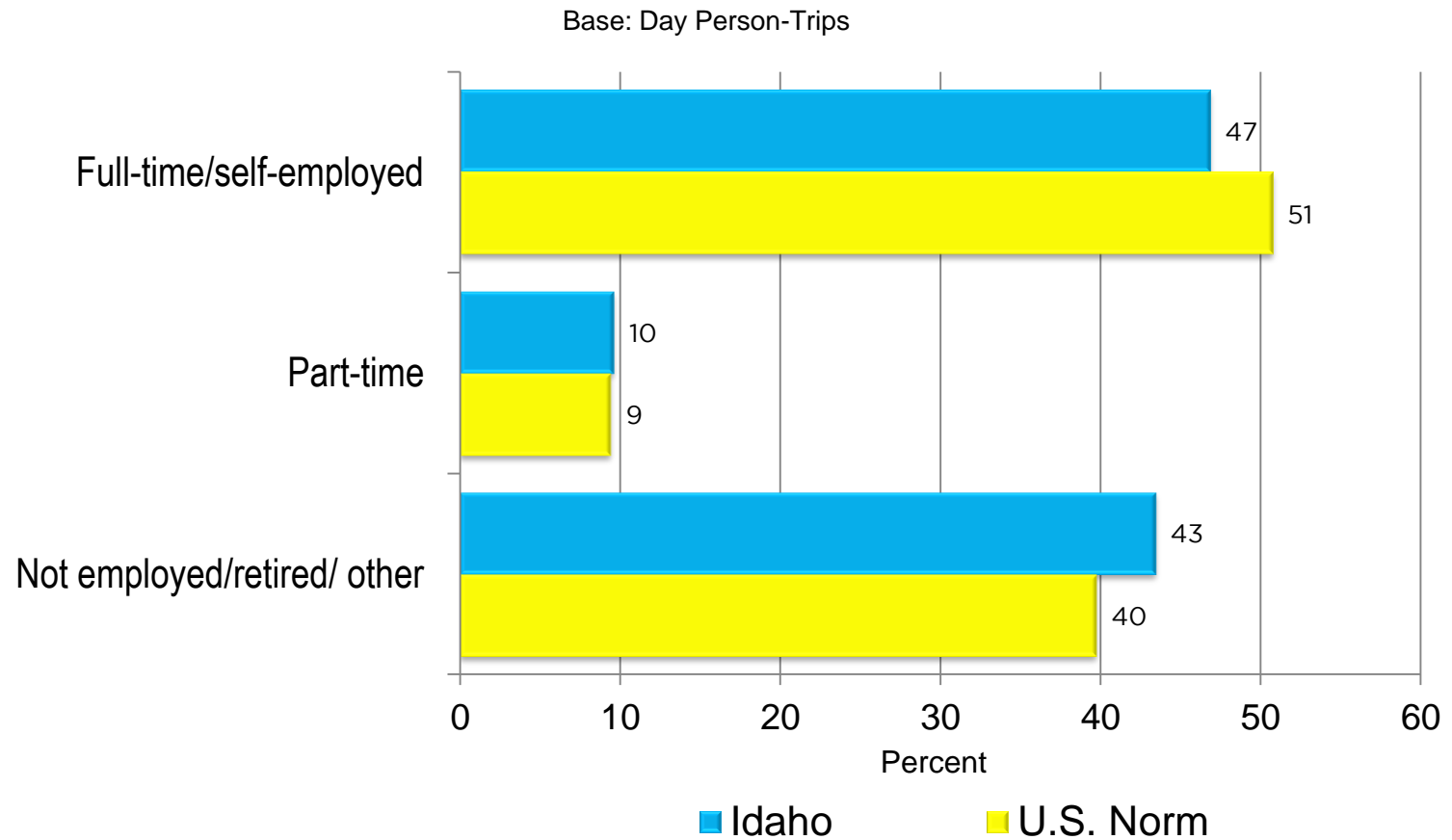
Children in Household



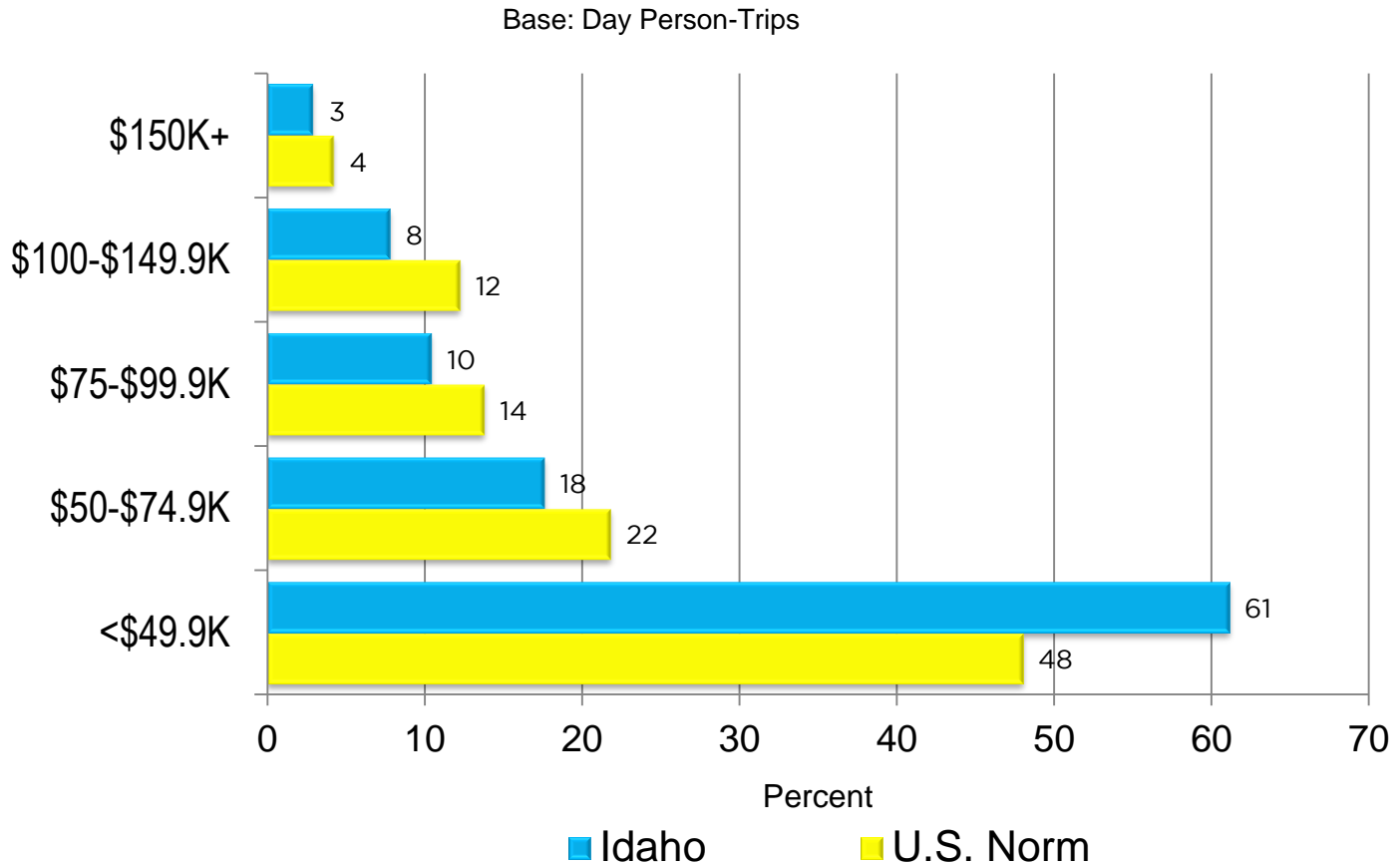
Education



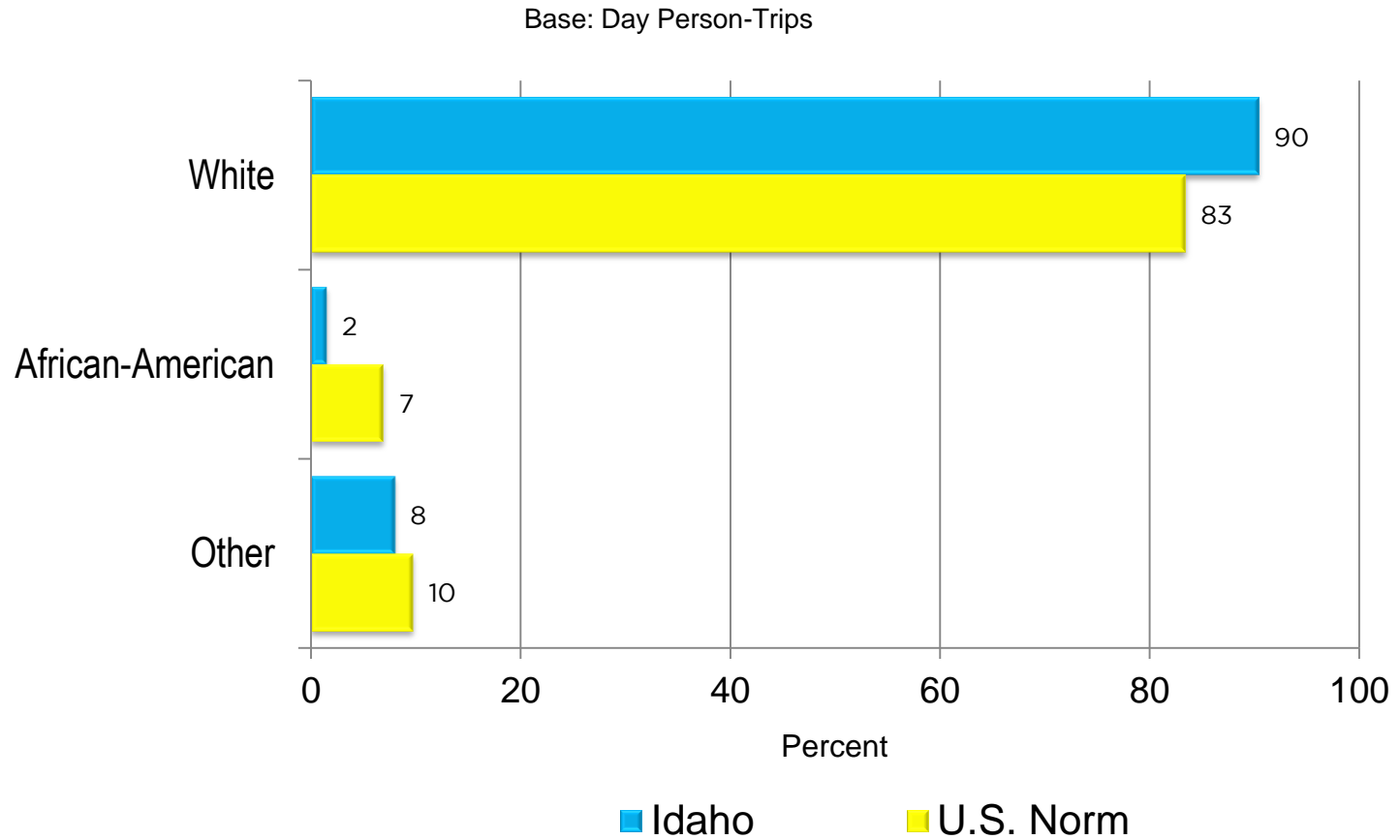
Employment



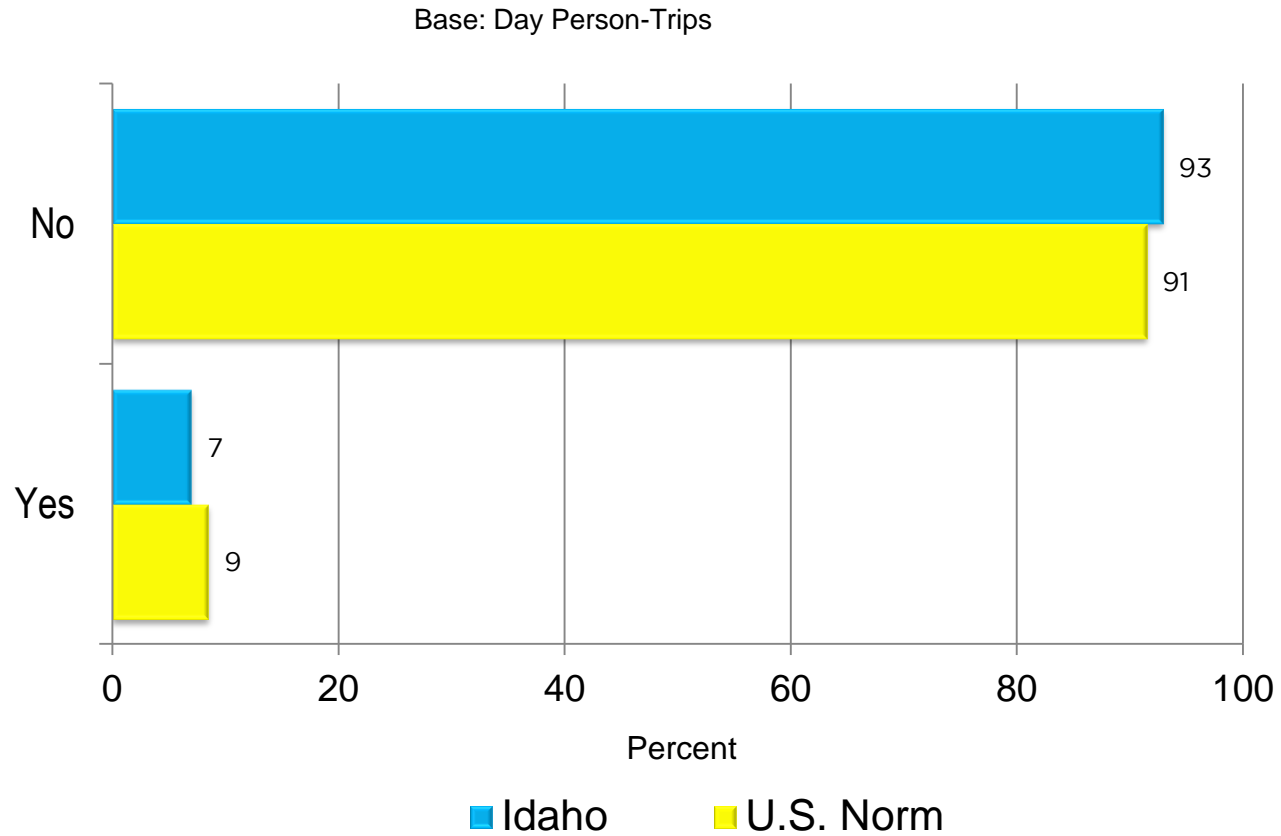
Household Income



Race



Hispanic Background





Appendix: 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:** Include 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

Marketable Trips:

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

- **Business Trips:**
 - 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.