



Better Together: Idaho Through COVID Recovery

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The logo for Longwoods International features the word "Longwoods" in a white, sans-serif font. The letter "o" is replaced by a white globe icon. Below "Longwoods" is the word "INTERNATIONAL" in a smaller, blue, all-caps, sans-serif font.

COVID-19

TRAVEL SENTIMENT STUDY WAVE 29

Fielded January 20, 2021

U.S. National Sample of 1,000 adults 18+

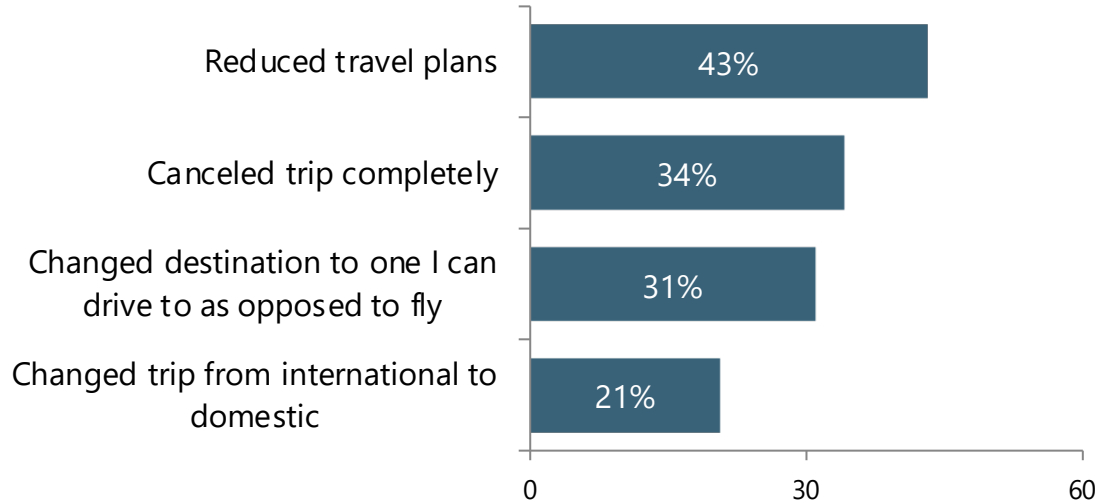
Longwoods
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PARTNERSHIP

IMPACT ON TRAVEL PLANS



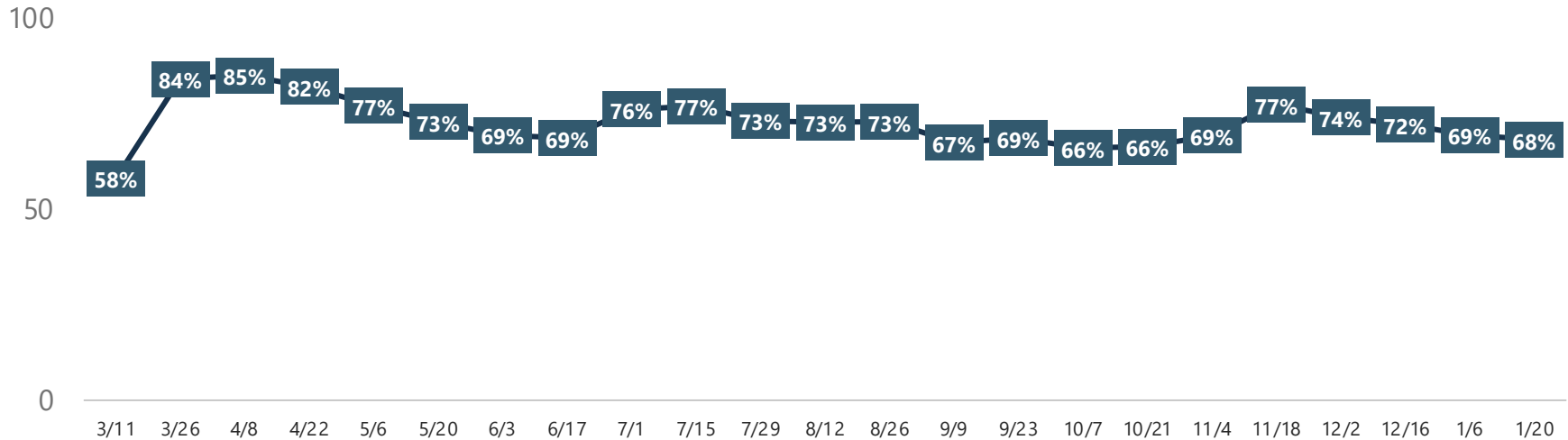
of travelers planning to travel in the next six months will change their travel plans due to coronavirus



Base: Coronavirus Changed Travel Plans

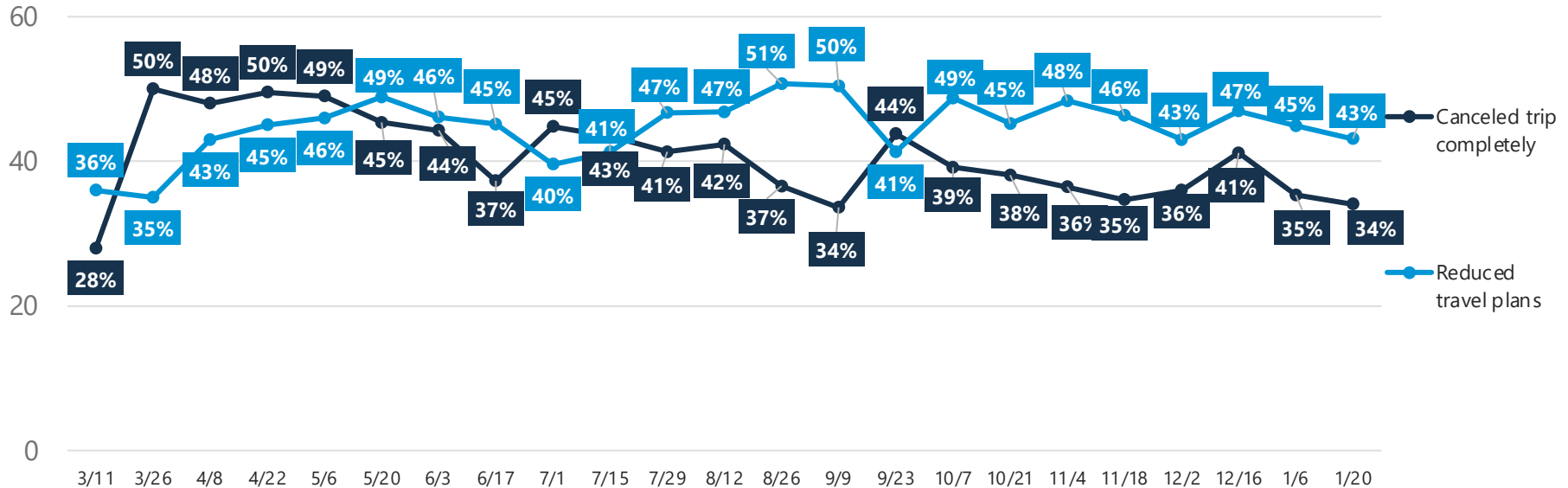
IMPACT ON TRAVEL PLANS

Travelers Planning to Change Upcoming Travel Plans Due to COVID-19 Comparison



IMPACT ON TRAVEL PLANS

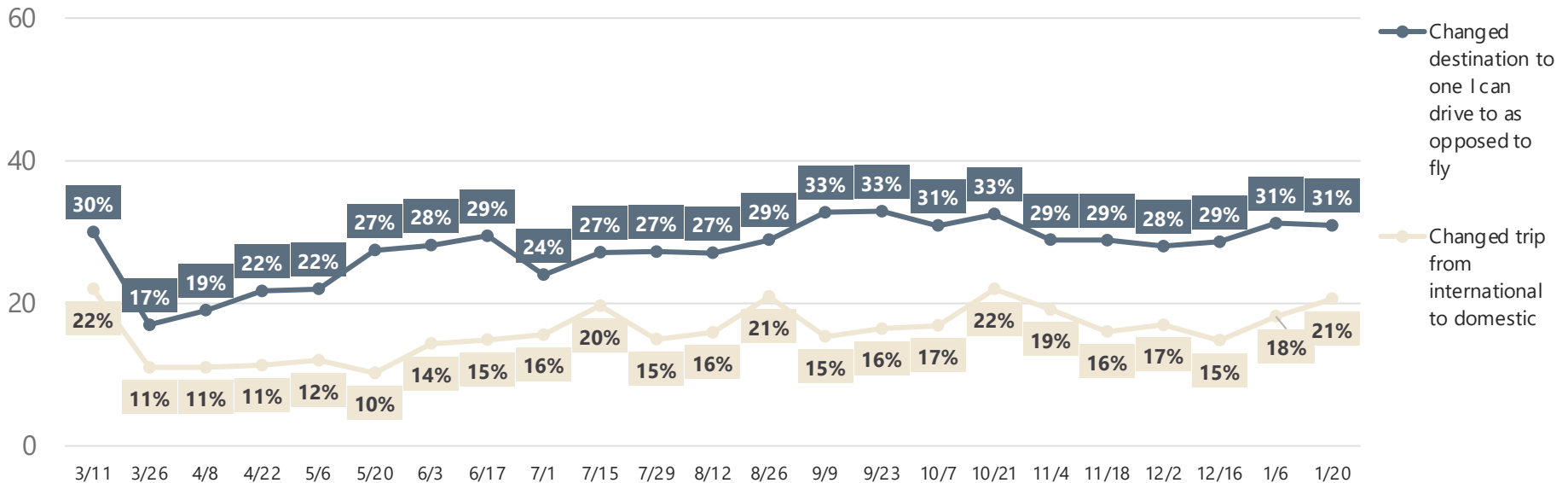
Impact of COVID-19 on Upcoming Travel Plans Comparison



Base: Coronavirus Changed Travel Plans

IMPACT ON TRAVEL PLANS

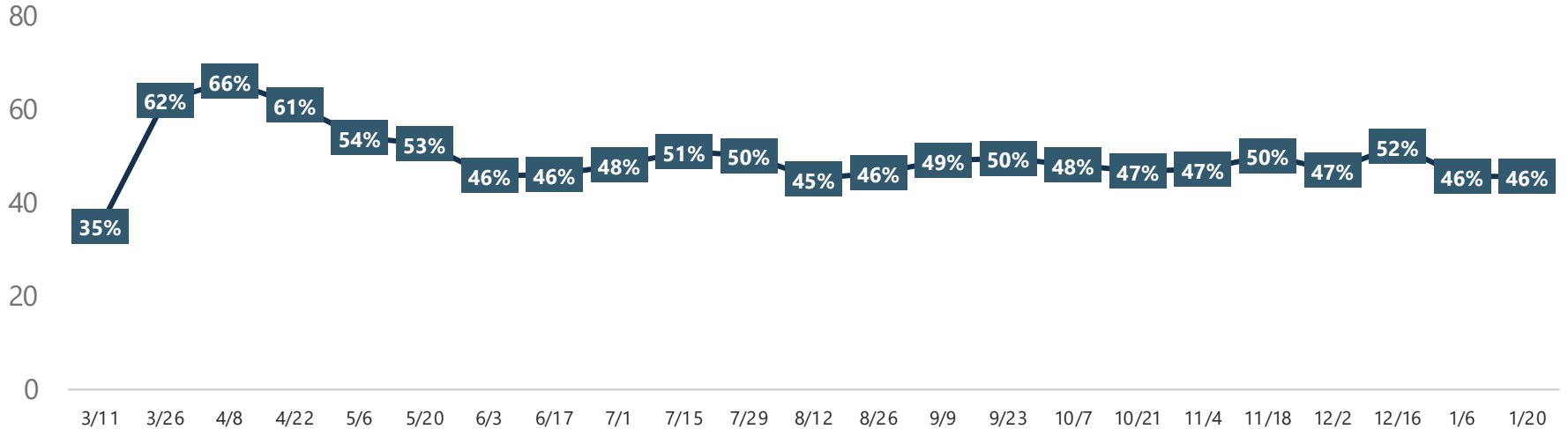
Impact of COVID-19 on Upcoming Travel Plans Comparison



Base: Coronavirus Changed Travel Plans

IMPACT ON TRAVEL PLANS

Indicated that Coronavirus Would Greatly Impact their Decision to Travel in the Next Six Months





Travel USA Visitor Profile



Longwoods Travel USA®

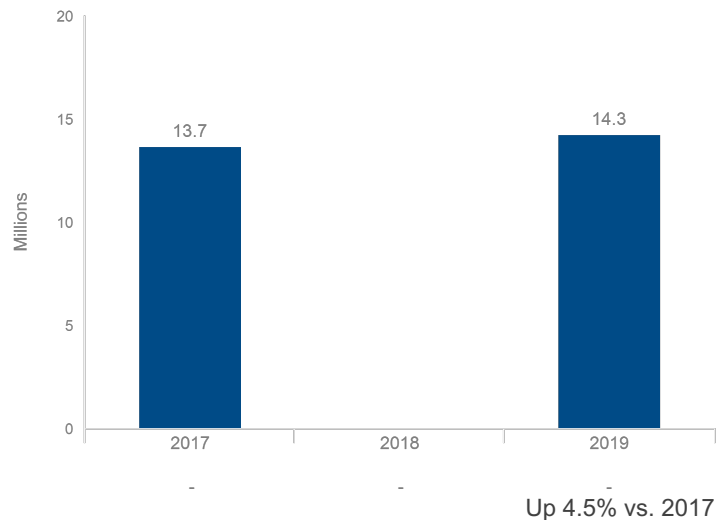
- Begun in 1990, Travel USA® is the largest and oldest ongoing American domestic travel tracking study, with almost 275,000 trips in our 2019 database.
- That database is representative of all overnight and day trips Americans took in 2019 within the United States.
- Overnight trip defined as any journey for business or pleasure outside of a respondent's community not part of their normal routine, where they spent one or more nights away from home.
- There are 1,149 overnight trips to Idaho in the 2019 Travel USA® database.



Size and Structure of Idaho's Domestic Travel Market

Base: 2019 Overnight Person-Trips

Overnight Trips to Idaho



Total Size of Idaho 2019 Domestic Travel Market

Total Person-Trips

35.4 Million

Up 3.3% vs. 2017

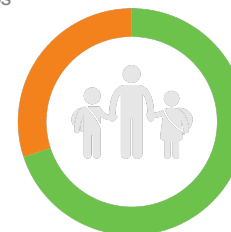


- Day
60% | 21.1 Million
- Overnight
40% | 14.3 Million

Size of Idaho Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips

14.3 Million



- Adults
70% | 9.9 Million
- Children
30% | 4.3 Million

Idaho's Overnight Trip Expenditures

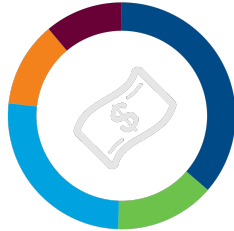
Base: 2019 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

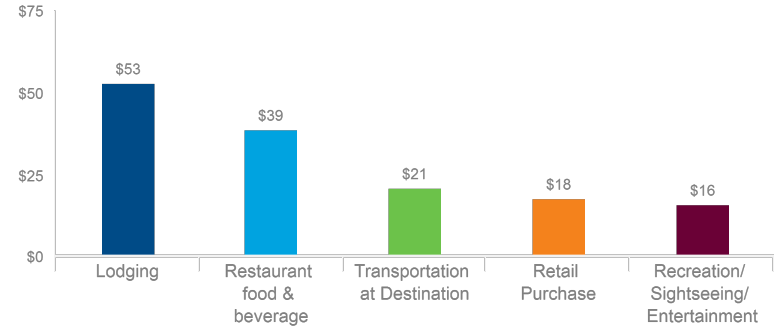
\$2.111 Billion

Up 12.9% vs. 2017

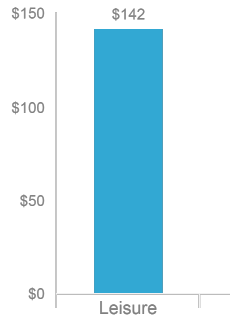


Lodging	36%	\$759 Million
Transportation at Destination	14%	\$303 Million
Restaurant Food & Beverage	26%	\$559 Million
Retail Purchase	12%	\$255 Million
Recreation/Entertainment	11%	\$235 Million

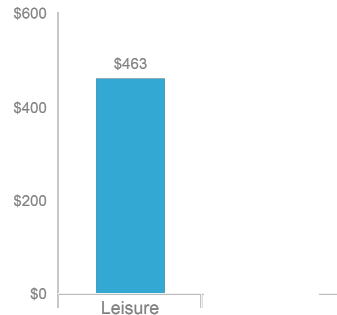
Average Per Person Expenditures on Domestic Overnight Trips - by Sector



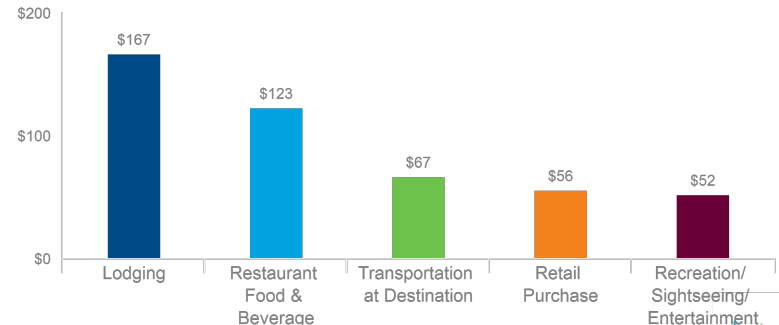
Average Per Person Expenditures on Domestic Overnight Trips - by Trip Purpose



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



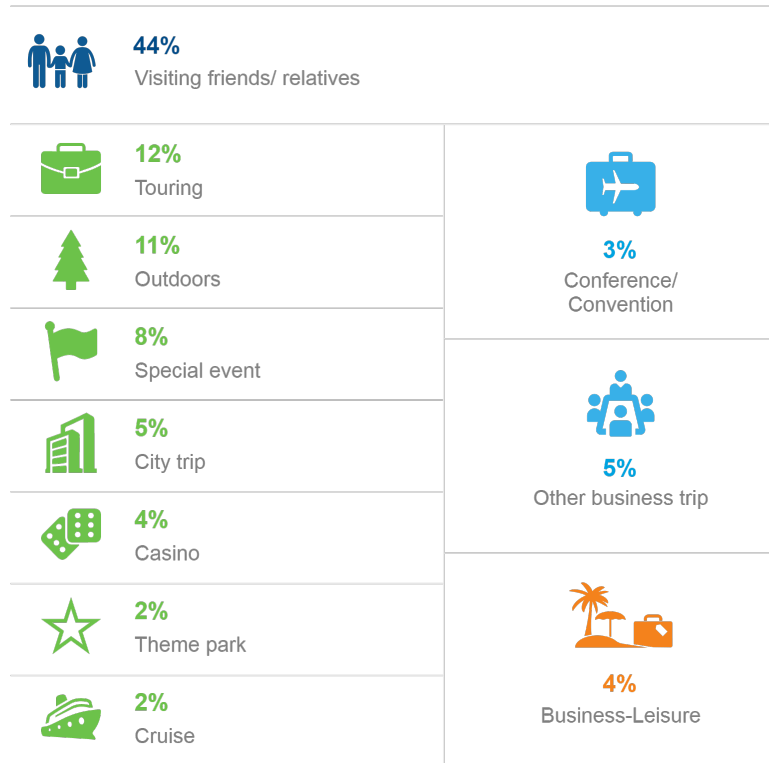
Average Per Party Expenditures on Domestic Overnight Trips - by Sector



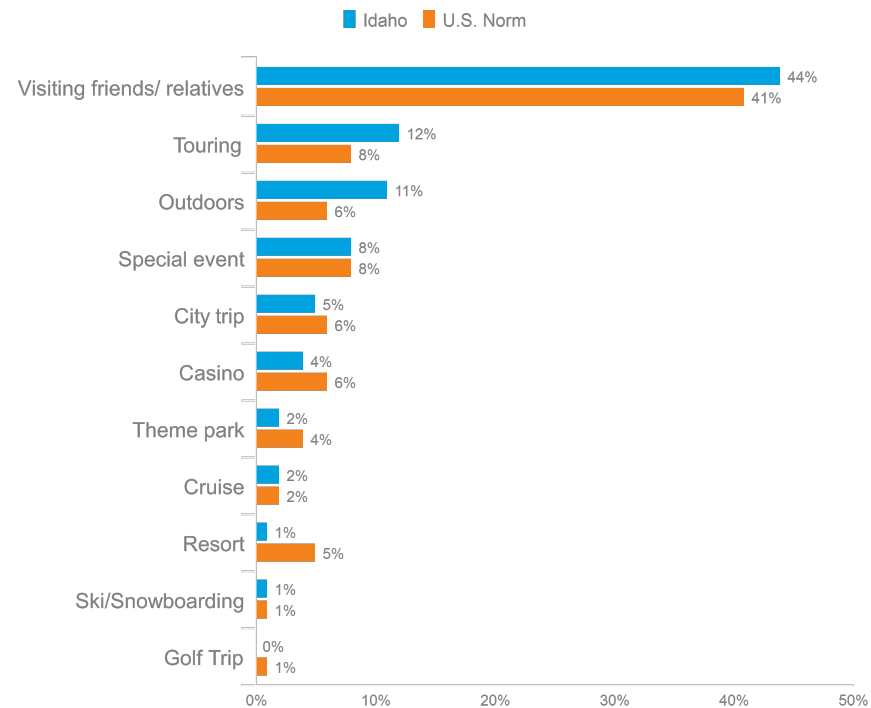
Idaho's Overnight Trip Characteristics

Base: 2019 Overnight Person-Trips

Main Purpose of Trip



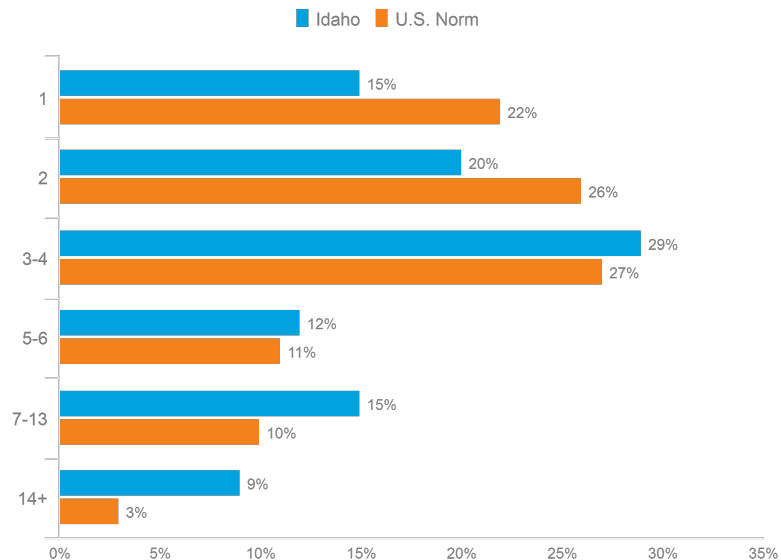
Main Purpose of Leisure Trip



Idaho's Overnight Trip Characteristics

Base: 2019 Overnight Person-Trips

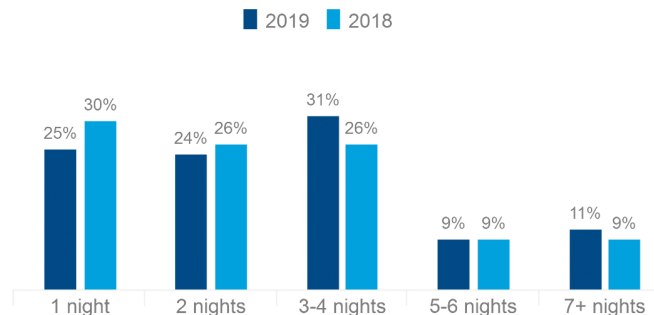
Total Nights Away on Trip



Idaho
5.4
Average Nights

U.S. Norm
3.8
Average Nights

Number of Nights Spent in Idaho - Trended





















Average in 2019
3.6
Nights

Average last year
3.1
Nights

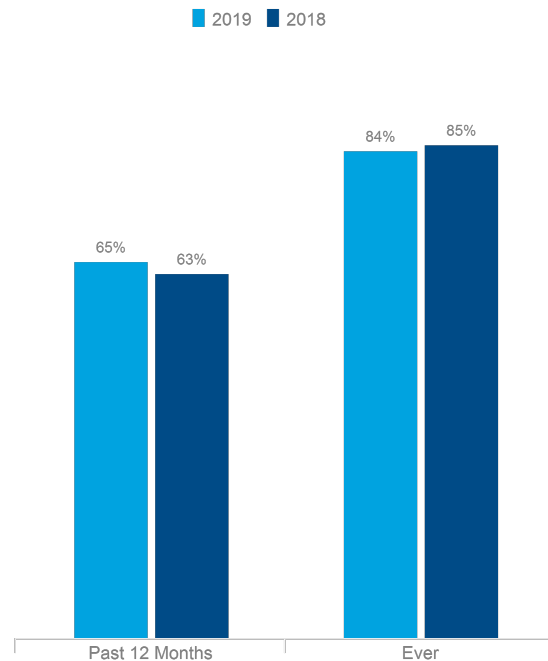
Idaho: During Trip

Base: 2019 Overnight Person-Trips

% Very Satisfied with Trip

	Overall trip experience		75%
	Friendliness of people		67%
	Safety and Security		65%
	Quality of accommodations		62%
	Cleanliness		61%
	Quality of food		57%
	Sightseeing and attractions		53%
	Value for money		50%
	Music/nightlife/entertainment		32%

Past Visitation to Idaho





Super Regions

**Idaho Conference on Recreation and Tourism
Recovery Workshops
October 2020**



Region I: Northern & Region II: North Central

Idaho: Regions I & II

Region I: Northern

Total Size of Domestic Travel Market

8.2
million

5.3
day trips

2.9
overnight trips

Top cities of origin for overnight trips:

1. Spokane, WA
2. Seattle-Tacoma, WA
3. Boise, ID
4. Portland, OR
5. Los Angeles, CA

Overnight Stays

The average number of nights spent in Northern Idaho:

3.0 Nights

Region II: North Central

Total Size of Domestic Travel Market

3.8
million

2.4
day trips

1.4
overnight trips

Top cities of origin for overnight trips:

1. Spokane, WA
2. Boise, ID
3. Seattle-Tacoma, WA
4. Missoula, MT
5. Idaho Falls-Pocatello, ID
6. Los Angeles, CA

Overnight Stays

The average number of nights spent in North Central Idaho:

2.8 Nights

Idaho: Regions I & II

Region I: Northern

Top reasons visitors come to Northern Idaho:

- + visit friends and family
- + experience the outdoors
- + tour the region

Top 5 visitor activities in Northern Idaho:



shopping



hiking/backpacking



landmark/historic site



bar/night club



swimming



national/state park

Tie

Region II: North Central

Top reasons visitors come to North Central Idaho:

- + visit friends and family
- + experience the outdoors
- + tour the region

Top 5 visitor activities in North Central Idaho:



shopping



hiking/backpacking



camping



national/state park



landmark/historic site



Region IV: South Central & Region VII: Central

Idaho: Regions IV & VII

Region IV: South Central

Total Size of Domestic Travel Market

3.8

million



2.5

day trips

1.3

overnight trips

Top cities of origin for overnight trips:

1. Boise, ID
2. Salt Lake City, UT
3. Idaho Falls-Pocatello, ID
4. Twin Falls, ID
5. Seattle-Tacoma, WA
6. Los Angeles, CA
7. Portland, OR

Overnight Stays

The average number of nights spent in South Central Idaho:

2.6 Nights

Region VII: Central

Total Size of Domestic Travel Market

4.3

million



2.5

day trips

1.8

overnight trips

Top cities of origin for overnight trips:

1. Boise, ID
2. Twin Falls, ID
3. Los Angeles, CA
4. Idaho Falls-Pocatello, ID
5. Salt Lake City, UT
6. Seattle-Tacoma, WA

Overnight Stays

The average number of nights spent in Central Idaho:

3.2 Nights

Idaho: Regions IV & VII

Region IV: South Central

Top reasons visitors come to South Central Idaho:

- + visit friends and family
- + tour the region
- + attend special events

Top 5 visitor activities in South Central Idaho:



shopping



landmark/historic site



hiking/backpacking



national/state park



swimming

Region VII: Central

Top reasons visitors come to Central Idaho:

- + visit friends and family
- + experience the outdoors
- + tour the region

Top 5 visitor activities in Central Idaho:



hiking/backpacking



camping



shopping



landmark/historic site



national/state park



Region V: Southeast & Region VI: Eastern

Idaho: Regions V & VI

Region V: Southeast

Total Size of Domestic
Travel Market

5.5

million



3.2

day trips

2.3

overnight trips

Top cities of origin
for overnight trips:

1. Salt Lake City, UT
2. Idaho Falls-Pocatello, ID
3. Boise, ID
4. Los Angeles, CA
5. Portland, OR

Overnight Stays

The average number of nights
spent in Southeast Idaho:

2.9 Nights

Region VI: Eastern

Total Size of Domestic
Travel Market

4.3

million



2.3

day trips

2.0

overnight trips

Top cities of origin
for overnight trips:

1. Salt Lake City, UT
2. Idaho Falls-Pocatello, ID
3. Los Angeles, CA
4. Boise, ID
5. Spokane, WA

Overnight Stays

The average number of nights
spent in Eastern Idaho:

2.8 Nights

Idaho: Regions V & VI

Region V: Southeast

Top reasons visitors come to Southeastern Idaho:

- + visit friends and family
- + attend special events
- + experience the outdoors

Top 5 visitor activities in Southeast Idaho:



shopping



hiking/backpacking



landmark/historic site



national/state park



swimming

Region VI: Eastern

Top reasons visitors come to Eastern Idaho:

- + visit friends and family
- + experience the outdoors
- + tour the region

Top 5 visitor activities in Eastern Idaho:



shopping



hiking/backpacking



national/state park



landmark/historic site



fishing



Region III: Southwest

Idaho: Regions III

Region III: Southwest

Total Size of Domestic Travel Market

10.9

million



6.1

day trips

4.8

overnight trips

Overnight Stays

The average number of nights spent in Southwest Idaho:

3.3 Nights

Top cities of origin for overnight trips:

1. Boise, ID
2. Salt Lake City, UT
3. Portland, OR
4. Los Angeles, CA
5. Spokane, WA
6. Idaho Falls-Pocatello, ID
7. Twin Falls, ID
8. Seattle-Tacoma, WA
9. Sacramento-Stockton-Modesto, CA

Top reasons visitors come to Southwestern Idaho:

- + visit friends and family
- + experience the outdoors
- + attend special events

Top 5 visitor activities in Southwest Idaho:



shopping



hiking/backpacking



national/state park



landmark/historic site



camping

Questions?

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