



Understanding Who is Coming to Idaho and Why

ANNA BLOUNT
OCTOBER '21





WHO WE ARE

Established in 1978 as a market research consultancy

Headquartered in Columbus, OH and Toronto, ON

Focused in tourism since 1985

Working with over 150 Destinations and Brands





AGENDA

- 2020 Idaho Overnight Domestic Visitation - Key Shifts from 2019
- American Traveler Sentiment – Takeaways for Fall Travel



Idaho Travel USA® Overnight Visitation



2020

Idaho Travel USA® 2020 Database

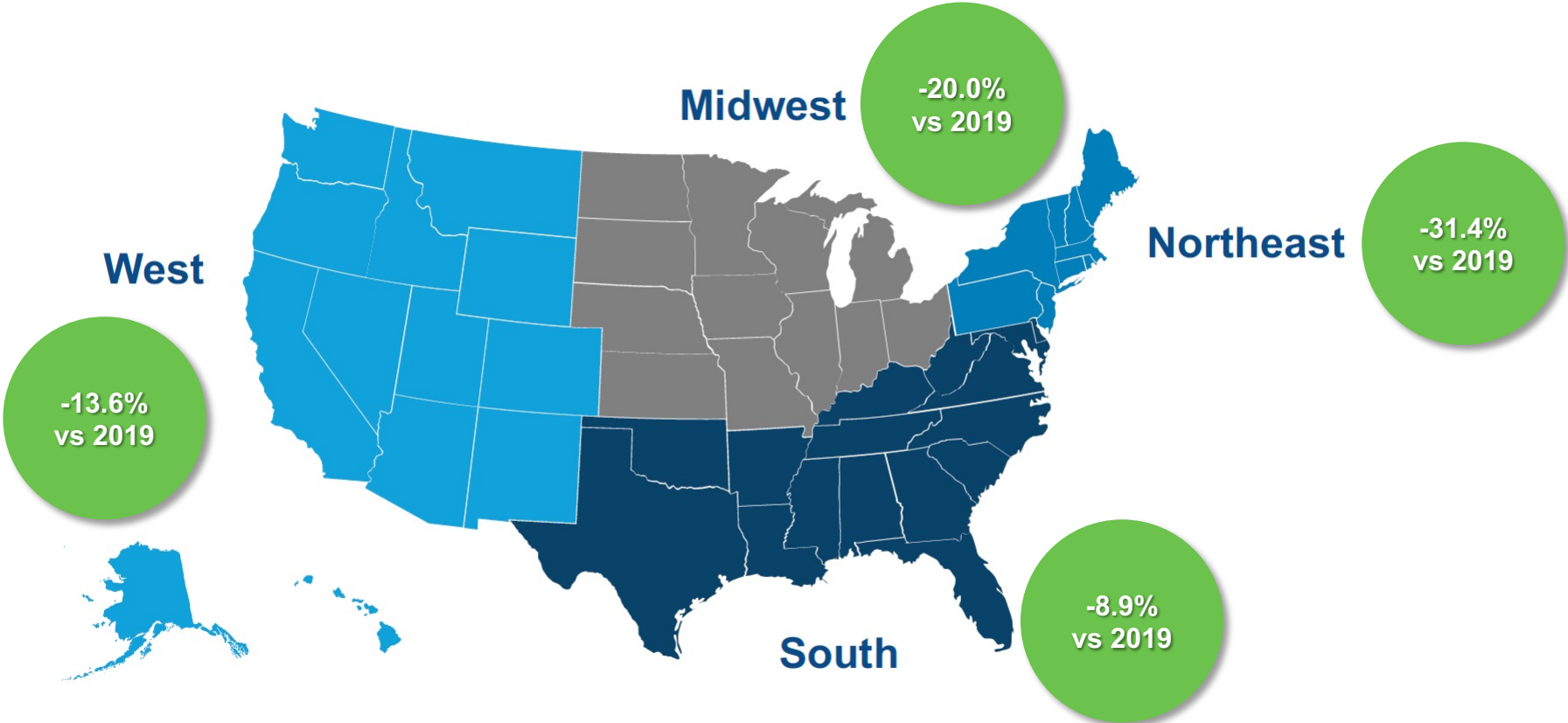
2,179

**2020 overnight
Idaho trips**

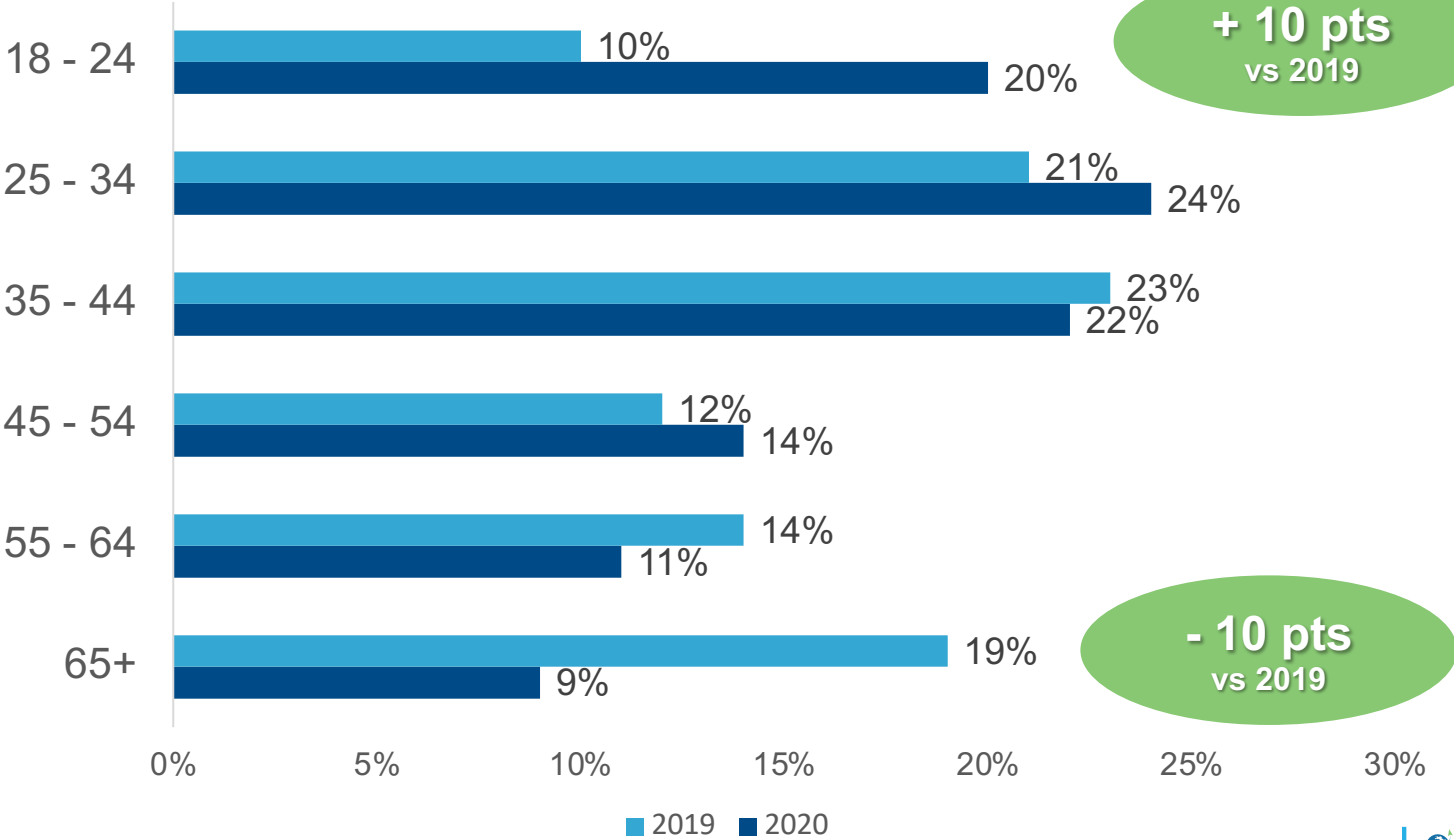
920

**2020 day
Idaho trips**

2020 Domestic Overnight Visitation - Regions



2020 Idaho Travel USA® Overnight Age



2020 Idaho Travel USA® Overnight Children in Household

49%

Children 17 or under in household

+ 5 pts
vs 2019

2020 Idaho Travel USA® Overnight Main Purpose of Trip

- 6 pts
vs 2019

+ 4 pts
vs 2019

- 3 pts
vs 2019



38%

Visiting friends/ relatives



15%

Outdoors



11%

Touring



6%

City trip



5%

Special event



3%

Casino



3%

Resort



2%

Conference/
Convention



4%

Other business trip



6%

Business-Leisure

Idaho Travel USA® Overnight Activities



Shopping

20%



Attending celebration

20%



Sightseeing

19%



Landmark/historic site

17%



Hiking/backpacking

16%



Business meeting

14%



National/state park

14%



Attended/participated in an amateur sports event

13%



Business convention/conference

13%



Camping

12%

2020 Idaho Travel USA® Overnight Activities

Shopping Types on Trip

	Idaho
 Convenience/grocery shopping	58%
 Big box stores (Walmart, Costco)	52%
 Outlet/mall shopping	45%
 Souvenir shopping	41%
 Boutique shopping	27%

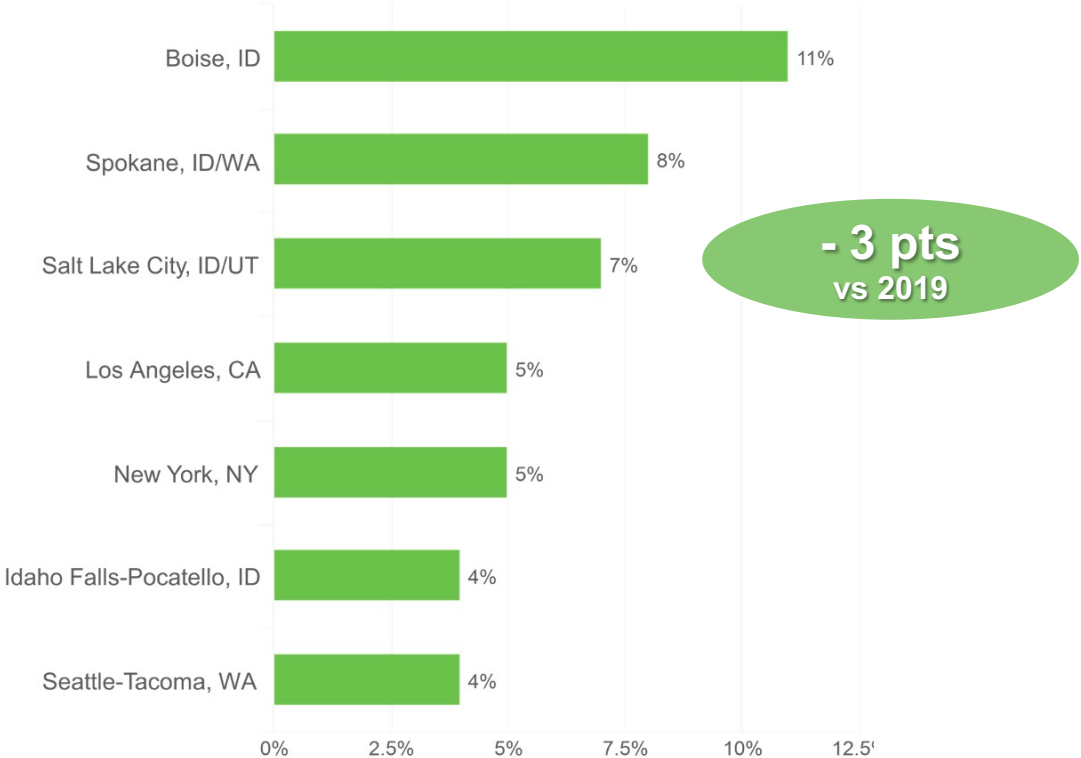
Base: 2020 Overnight Person-Trips that included Shopping

Dining Types on Trip

	Idaho
 Unique/local food	36%
 Picnicking	24%
 Food delivery service (UberEATS, DoorDash, etc.)	23%
 Street food/food trucks	22%
 Fine/upscale dining	19%
 Gastropubs	15%

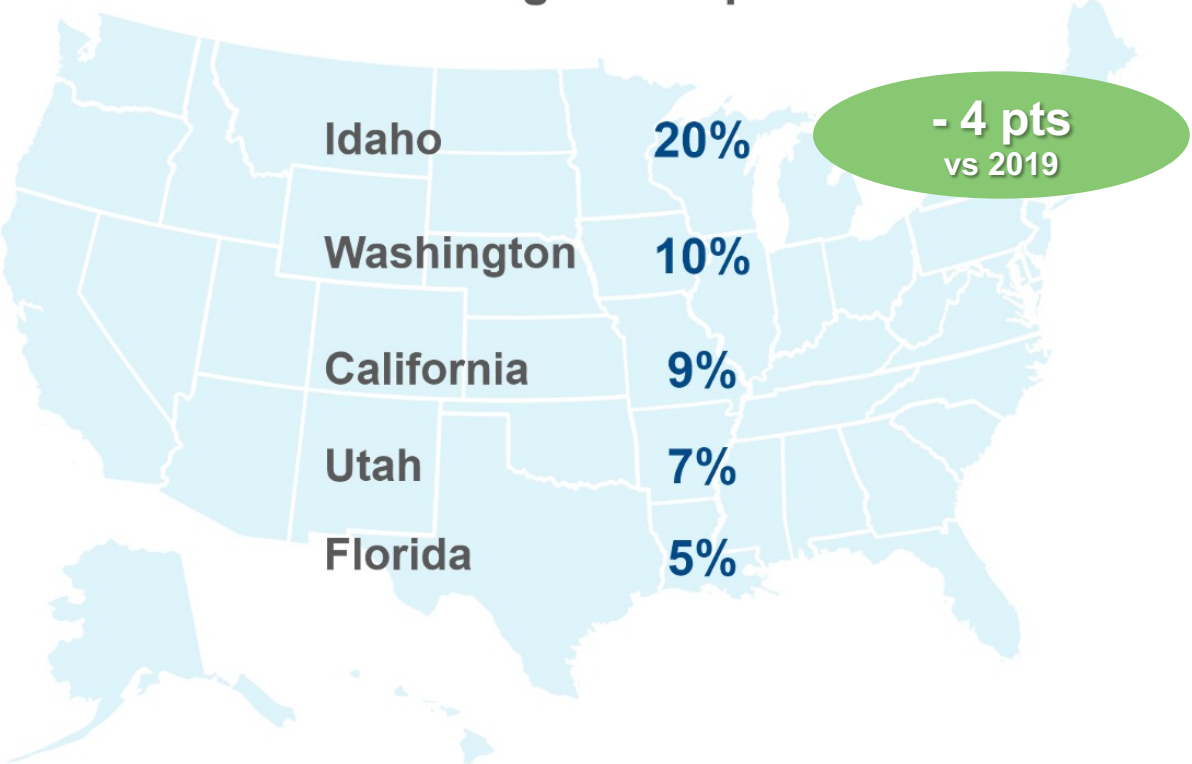
2020 Idaho Travel USA® Overnight Origin Markets

DMA Origin Of Trip



2020 Idaho Travel USA[®] Overnight Origin Markets

State Origin Of Trip



2020 Idaho Travel USA® Overnight Transportation

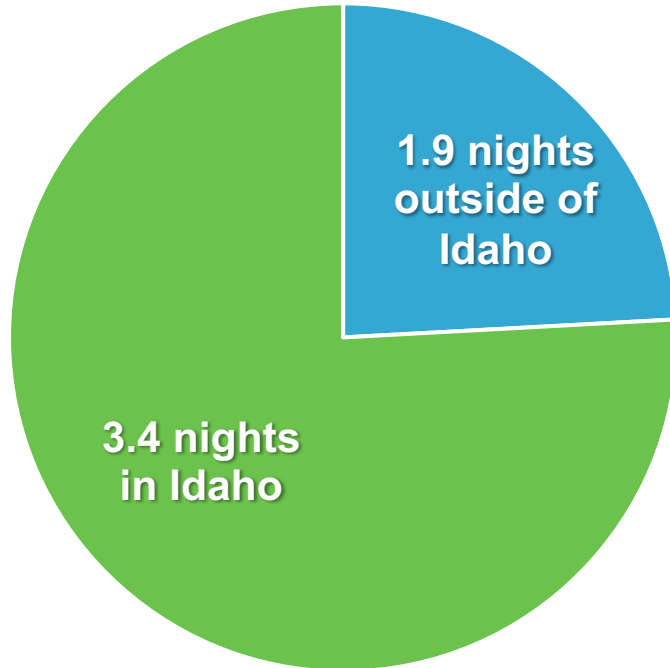


73% of Idaho overnight trips in 2020 involved travelers driving their own cars/trucks to the destination.

64% used their car/truck as primary transportation in 2019.

2020 Idaho Travel USA® Overnight Length of Stay

Average Length of Trip: 5.3 Nights



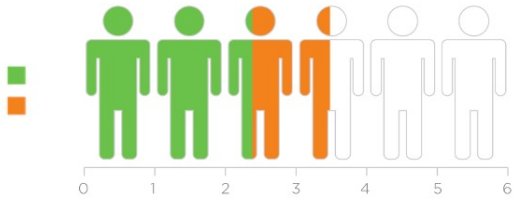
On average, **65%** of each trip including at least one night in Idaho was spent in the state.

2020 Idaho Travel USA® Overnight Travel Party

Size of Travel Party

■ Adults ■ Children

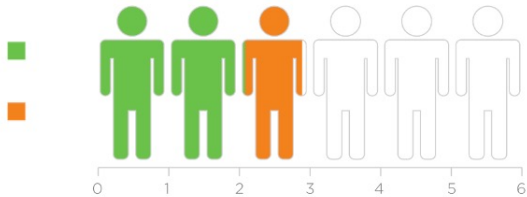
Idaho



Average number of people

Total
3.5

U.S. Norm

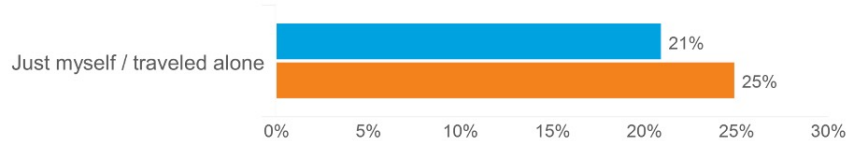


Average number of people

Total
3.0

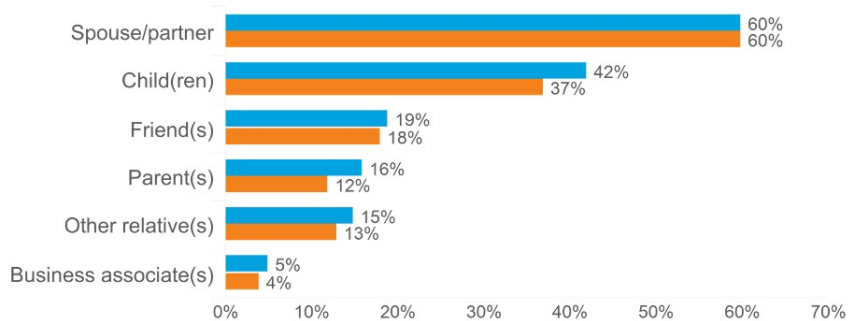
Percent Who Traveled Alone

■ Idaho ■ U.S. Norm



Composition of Immediate Travel Party

■ Idaho ■ U.S. Norm










2020 Idaho Travel USA® Overnight

16%

booked accommodations
through a short-term rental
website

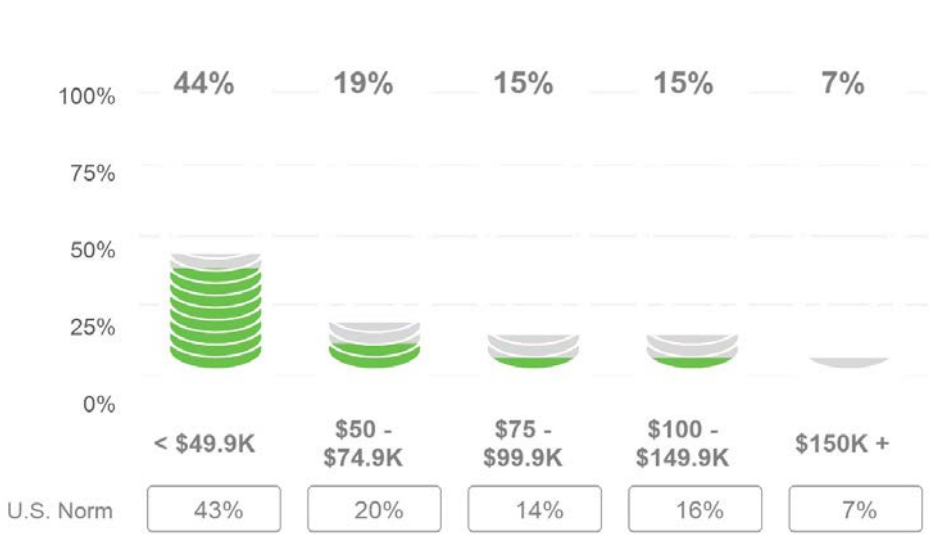
+ 3 pts
vs 2019

		Idaho
	Hotel	34%
	Home of friends / relatives	22%
	Motel	19%
	Campground / RV park	16%
	Bed & breakfast	14%
	Rented cottage / cabin	11%
	Rented home / condo / apartment	10%

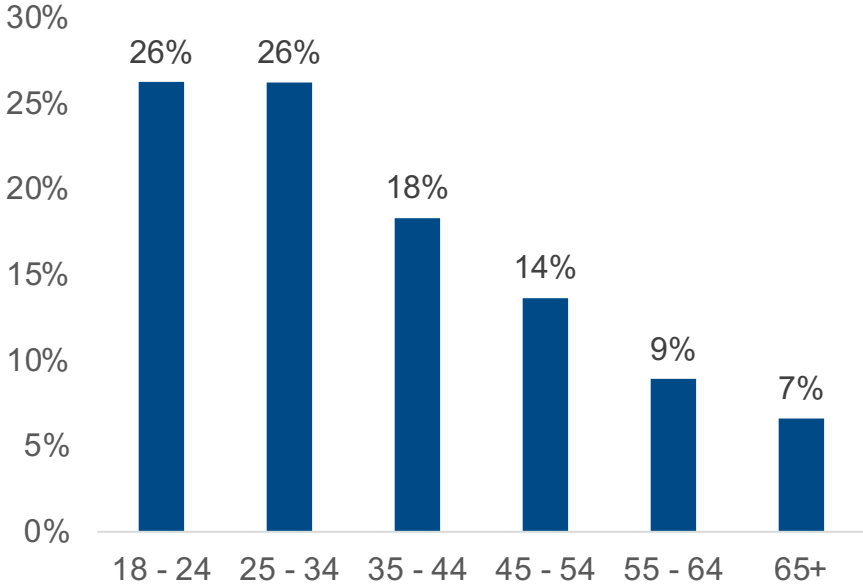
- 7 pts
vs 2019

2020 Idaho Travel USA® Overnight Annual Household

Household Income



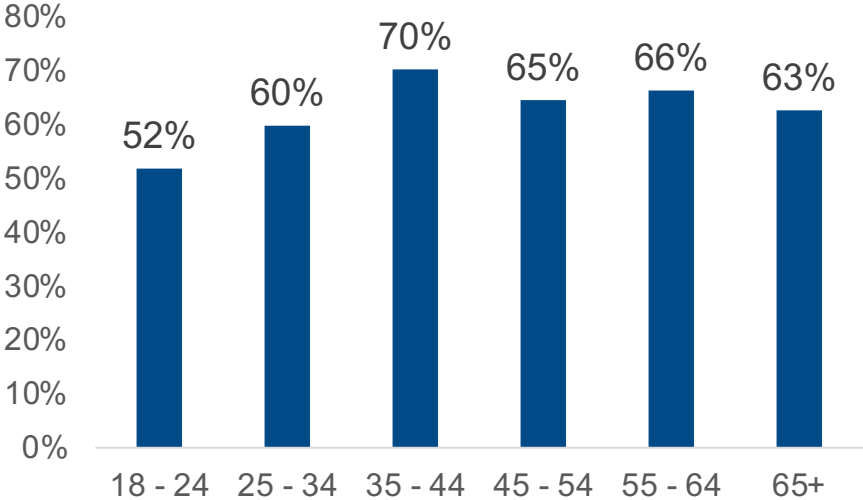
Household Income Less Than \$50,000



2020 Idaho Travel USA® Overnight Repeat

63%

of overnight visitors to Idaho have visited before in the past 12 months

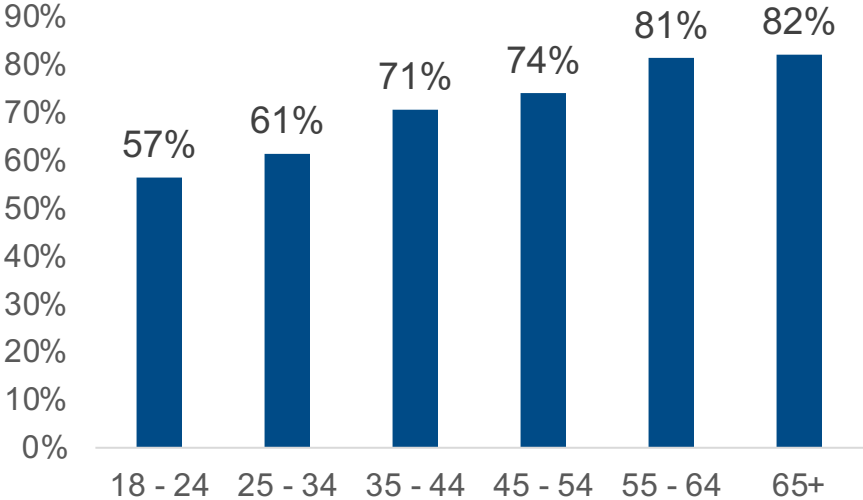


2020 Idaho Travel USA® Overnight Satisfaction

69%

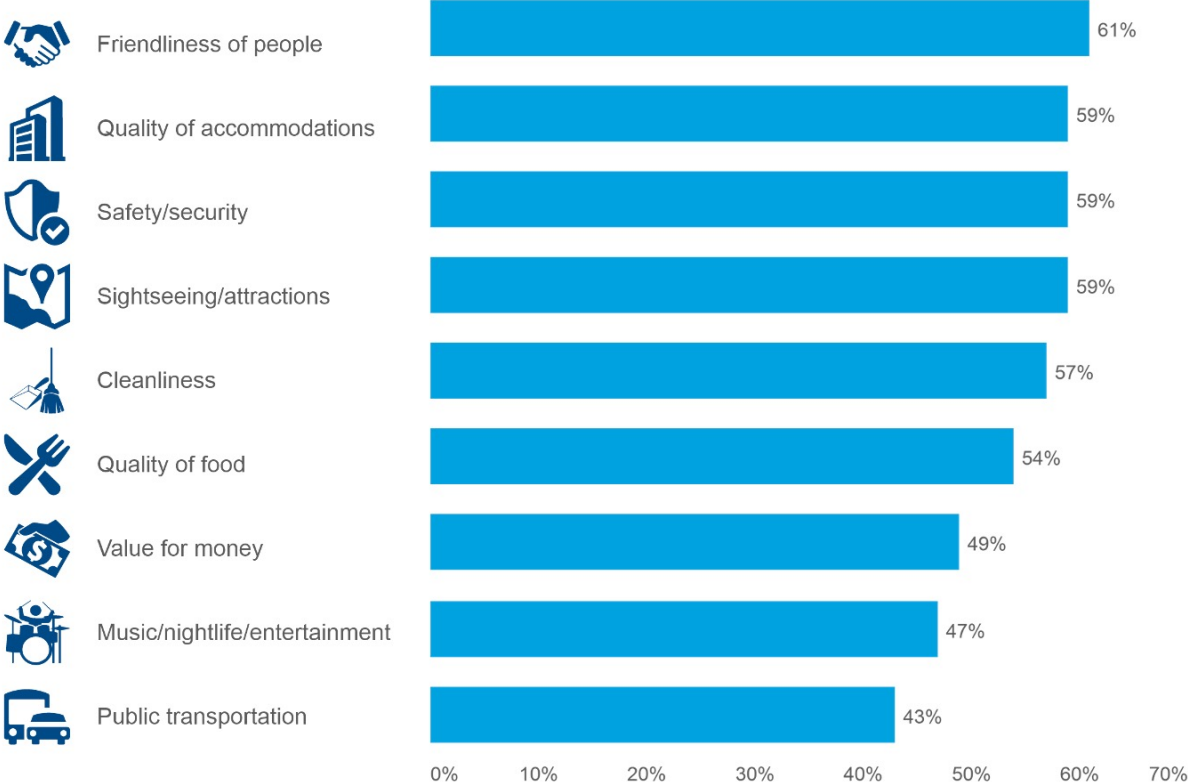
- 7 pts
vs 2019

of overnight visitors were highly satisfied with their trip to Idaho



2020 Idaho Travel USA® Overnight Satisfaction

% Very Satisfied with Trip



Key Takeaways

Younger & Older

Keep first-time younger travelers while welcoming back older travelers now willing to travel.

Satisfaction

High satisfaction is key to converting first-timers into repeat visitors. Look to delivering across age demographics.

Out-of-State Visitation

2020 saw a rise in out-of-state visitor share – who traditionally spend more. Further expanding this has positive implications of per person spending.

Bleisure Expansion?

For many travelers, implications of work life infiltrating leisure travel, will monitor through 2021 & 2022 to see how long-term.



EST. MARCH 2020

COVID-19 American Travel Sentiment Study Wave 46

1. Understand the resident as the traveler for the first time
2. Provide valuable insights to this industry to navigate the pandemic and power the recovery

miles
PARTNERSHIP

Longwoods
INTERNATIONAL

Methodology:

**1,000 US
Adult Travelers**

Fielded every other week

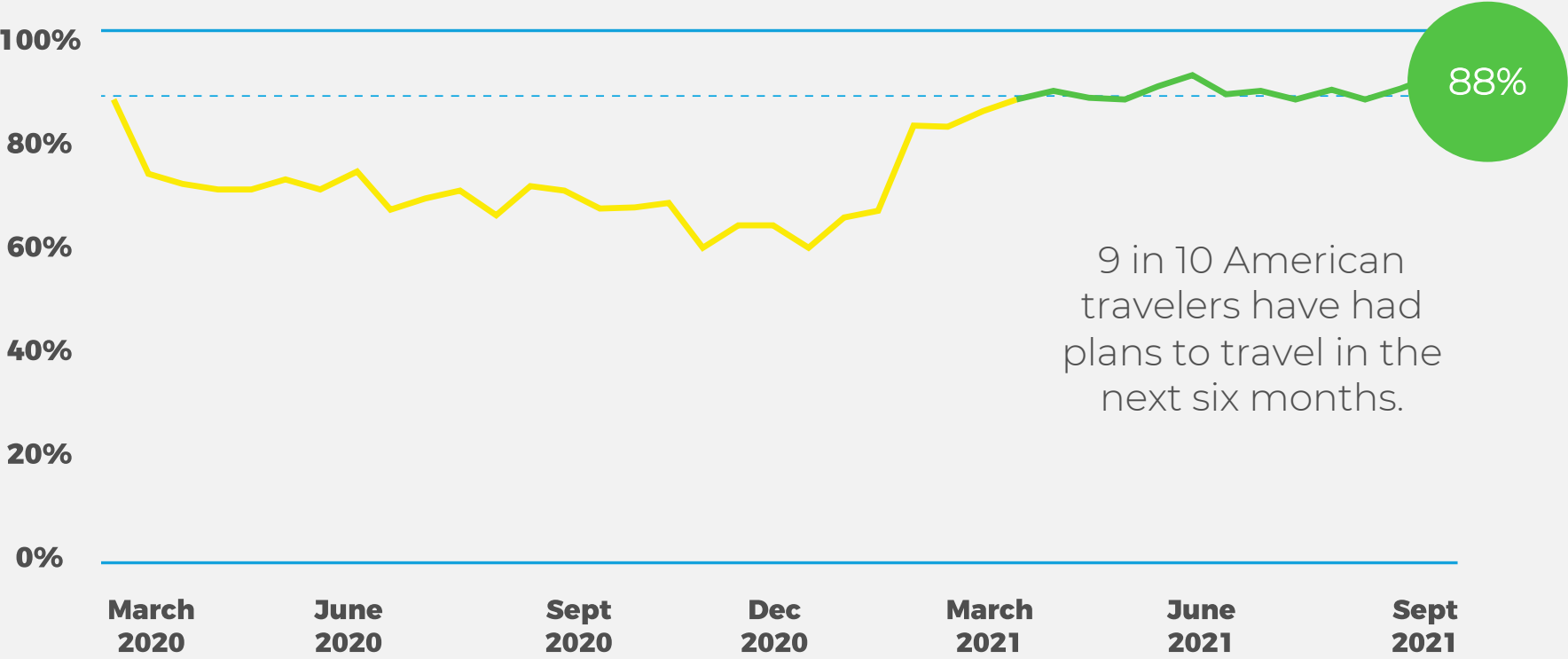
01

TRAVEL INTENT

Do Americans intend to
travel in the next 6 months?



Do Americans intend to travel?



However, COVID-19 is still influencing travel decisions”

34% are reducing the numbers of trips they'll take

32% are choosing drive rather than fly destinations

19% are choosing rural over city destinations

Only **9%** are canceling trips



02

HOW & WHERE

**What do they plan
to do this fall?**

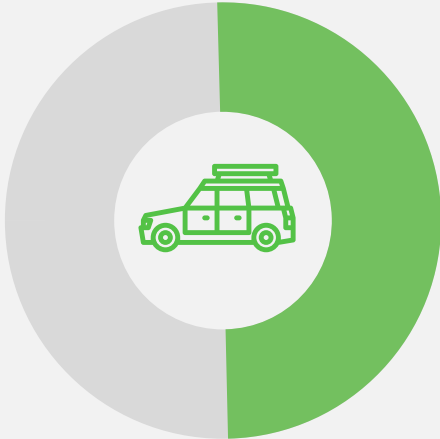
Fall 21 travel

63%



**Nearly 2/3 to see
friends and relatives**

52%



Half plan to
hit the road

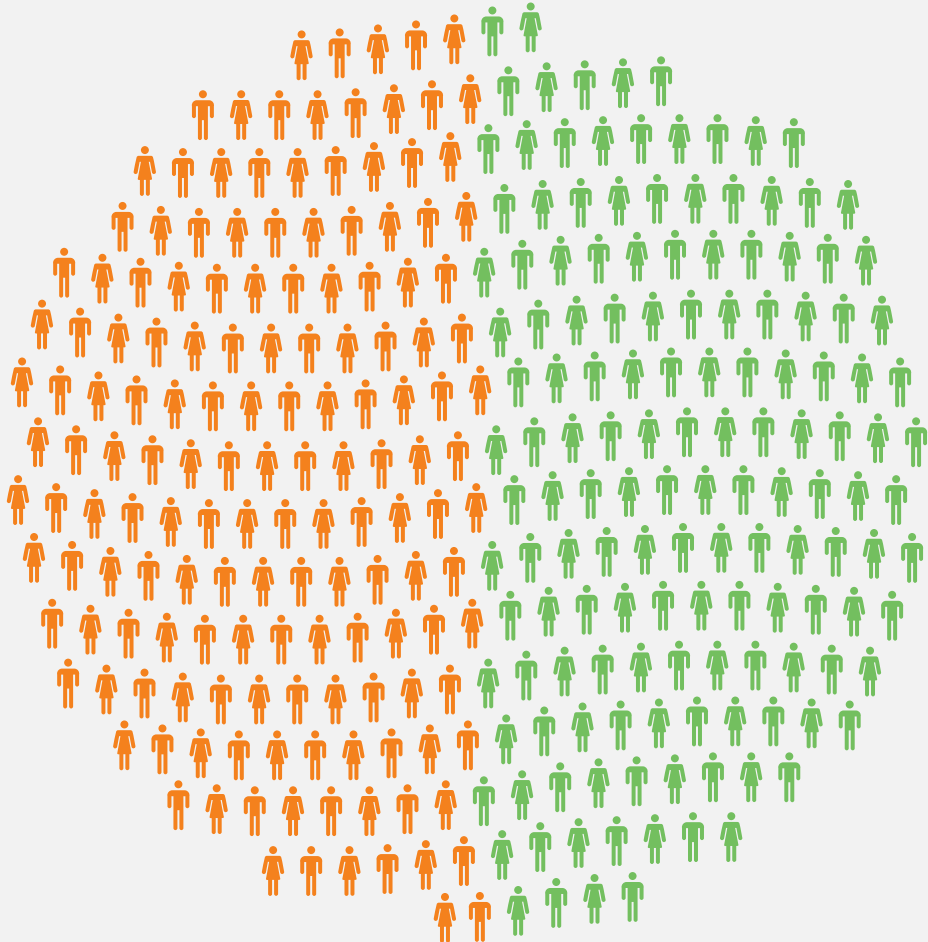
03

HEALTH & SAFETY

Are clear health and safety protocols important to American travelers?



Americans are split on the importance of clear health & safety protocols



44%

NO restrictions
are important

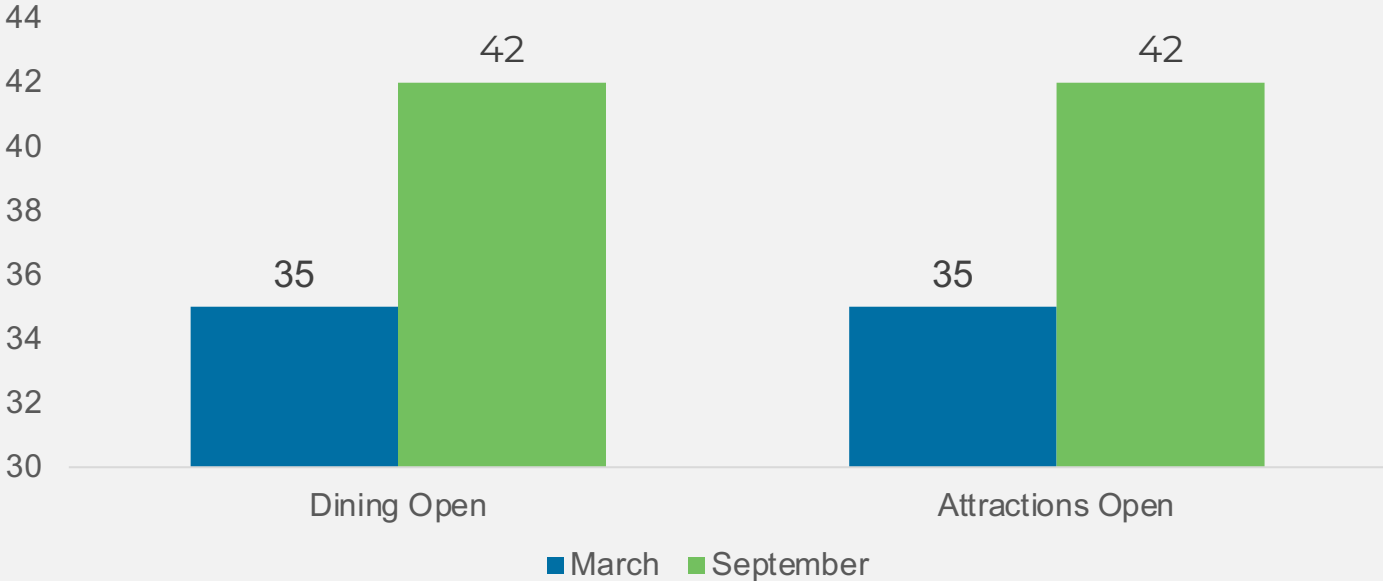
51%

Clear health and
safety protocols
at a destination
are important

43%

Mask wearing
requirements
are important

Compared to earlier this year, the availability of attractions and dining are important



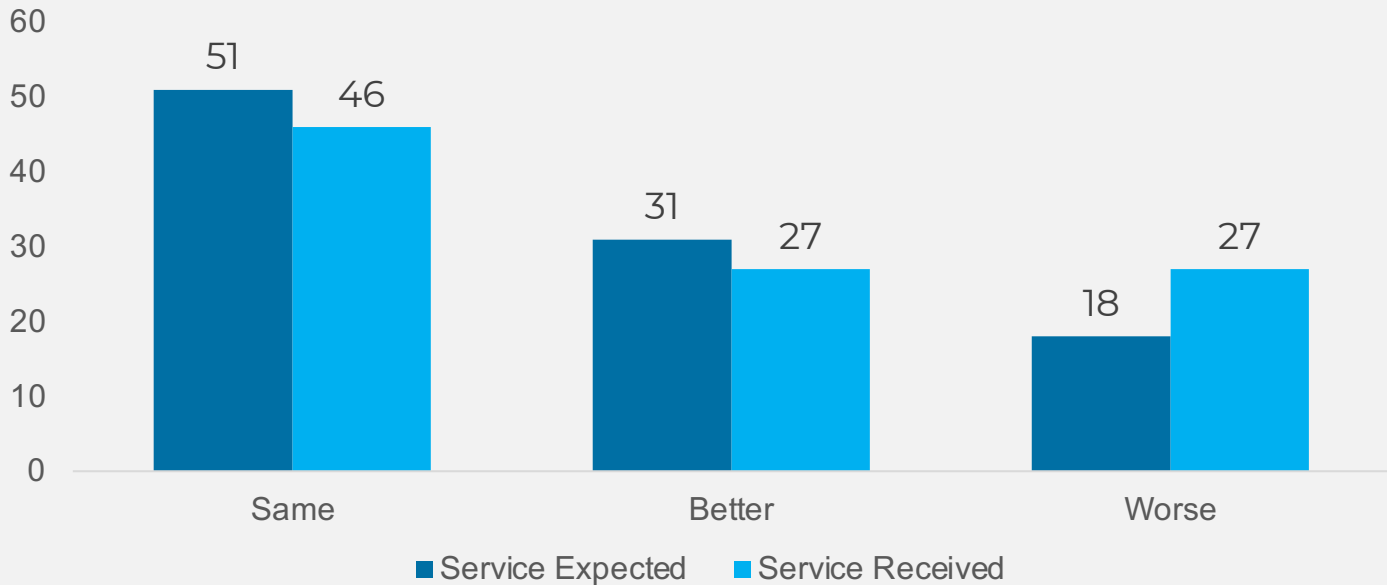
04

SERVICE EXPECTATIONS

What type of service do
travelers expect?



Expectations and services received have remained stable



05

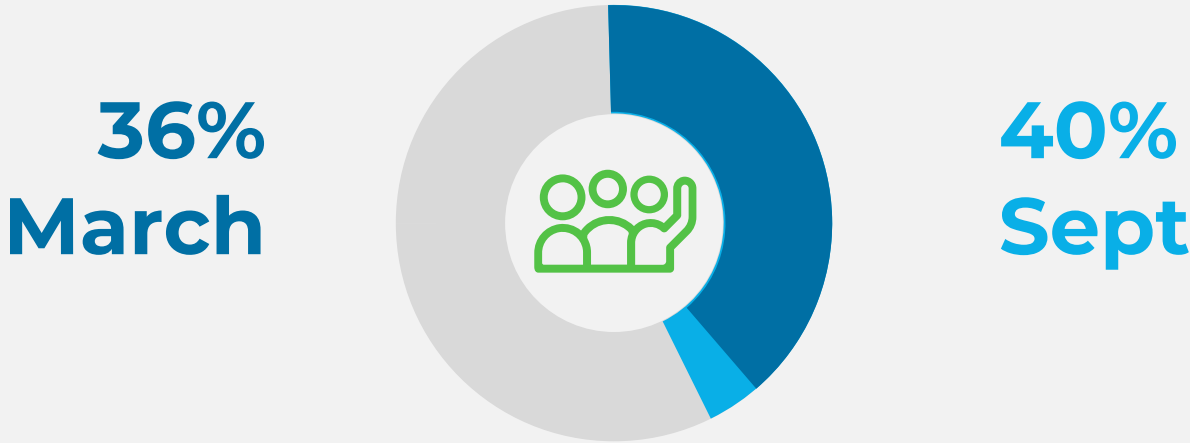
COMMUNITIES

How important is it for our communities to be open?



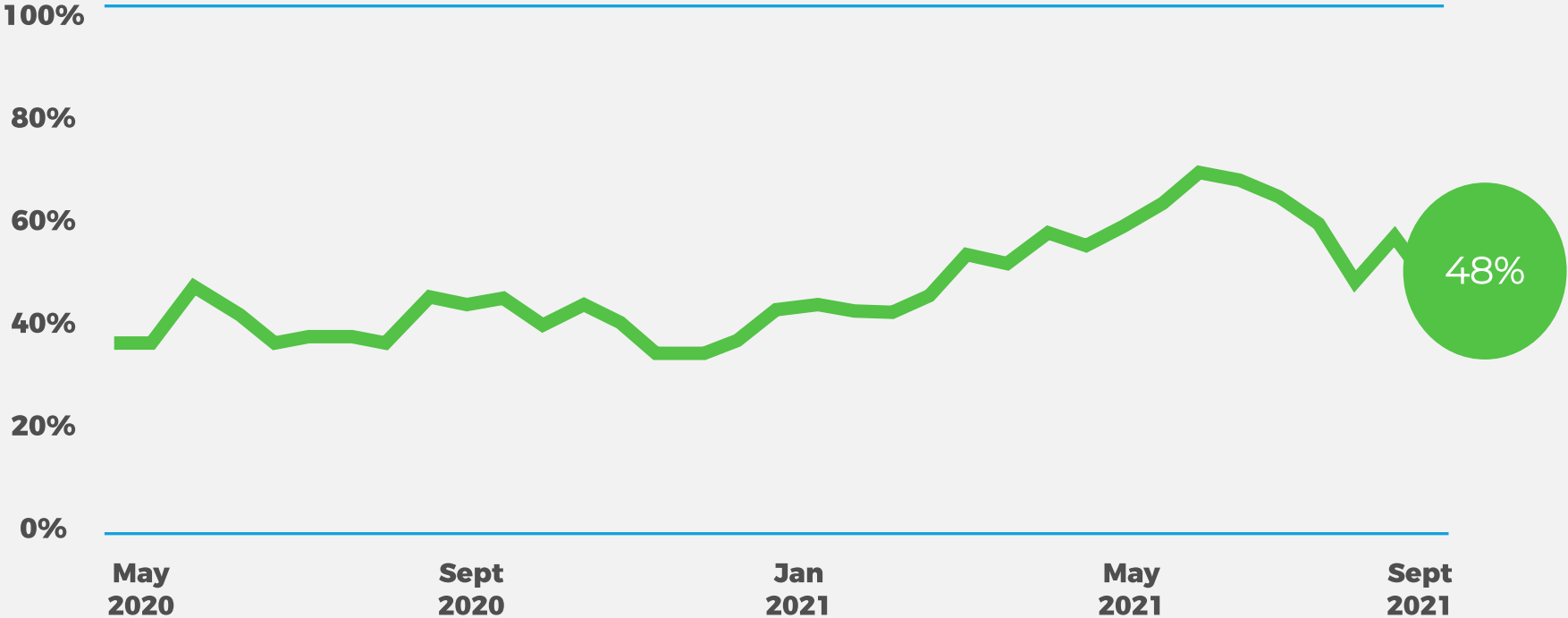
SHOP

Support for opening communities to visitors is key



Feeling welcome
in the destination

Welcoming visitors into our communities has been wavering and sits near early Q1 levels





Thank You!

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[arblount](#)