Idaho 2013 Visitor Profile
Idaho Conference on Recreation & Tourism
May 7, 2014
Sun Valley, Idaho
AnnDee Johnson
Longwoods International

- Established in 1978 as consultancy-focused research company
- Tourism since 1985
  - 9,000 interviews – changing Canada’s image
Today Travel USA®

Screens 2,000,000 Americans annually on-line

Employed by States, CVBs, industry associations, hotels, cruise lines, to assist in the planning of their tourism marketing efforts.

We specialize in integrated research programs:

- Visitor tracking and profiling
- Image and branding
- Accountability/communication effectiveness - Longwoods R.O.EYE™
Client base throughout North America

Research programs conducted in U.S., Canada, U.K., Japan, Mexico, Germany, Argentina, Brazil, and Colombia
Travel Clients
Non-Travel Clients
Peer Awards

- TTRA
- MRIA
- ARF – David Ogilvy Award
Introduction

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

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.

- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

- A **Person-Trip** is one trip taken by one visitor
  - Person-trips are the key unit of measure for this report.
Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips**: includes all trips where the main purpose was one of the following:
  - Visiting friends/relatives
  - Touring through a region to experience its scenic beauty, history and culture
  - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
  - Special event, such as a fair, festival, or sports event
  - City trip
  - Cruise
  - Casino
  - Theme park
  - Resort (ocean beach, inland or mountain resort)
  - Skiing/snowboarding
  - Golf

- **Business Trips**: includes
  - Conference/convention
  - Other business trip

- **Business-Leisure**: a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.
Size & Structure of the U.S. Travel Market
Total Size of the U.S. Travel Market — 2009-2013

Base: Total Overnight Trips

2009: 1,312
2010: 1,367
2011: 1,413
2012: 1,451
2013: 1,480

Total Growth: 2.0%
Structure of the U.S. Travel Market — 2013 Overnight Trips

- Visits to Friends/Relatives: 44%
- Marketable: 43%
- Business-Leisure: 4%
- Business: 10%

Base: Adult Overnight Trips

Base: Overnight Trips

- All Overnight Trips
- Visiting Friends/Relatives
- Marketable Trips
- Business-Leisure Trips
- Business Trips

Percent Change

-10 -5 0 5 10
Size & Structure of Idaho’s Travel Market
Total Size of the Idaho Travel Market in 2013

Total Person-Trips* = 30.7 Million

- Day Trips: 62% (18.9 Million)
- Overnight Trips: 38% (11.8 Million)

*Total volume includes both adults and children
Size of Idaho’s Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 11.8 Million

- Adults: 69% (8.2 Million)
- Children: 31% (3.6 Million)
Idaho’s Overnight Travel Market — by Trip Purpose

Adult Overnight Person-Trips = 8.2 Million

Leisure 86%
Business-Leisure 5%
Business 9%
Size of Idaho’s Day Travel Market — Adults vs. Children

Total Day Person-Trips = 18.9 Million

- Adults: 72% (13.6 Million)
- Children: 28% (5.3 Million)
Idaho’s Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 13.5 Million

- Leisure: 88%
- Business-Leisure (4%)
- Business: 8%
Overnight Trip Detail
Overnight Expenditures
Total Overnight Spending — by Sector

Total Spending = $1.4 Billion

- Lodging: 34% ($475 Million)
- Restaurant Food & Beverage: 25% ($351 Million)
- Retail: 15% ($213 Million)
- Transportation: 15% ($212 Million)
- Recreation: 11% ($156 Million)

Total Spending = $1.4 Billion
Average Per Person Expenditures on Overnight Trips — By Sector

Base: Total Overnight Person-Trips

<table>
<thead>
<tr>
<th>Sector</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$40</td>
</tr>
<tr>
<td>Restaurant Food &amp; Beverage</td>
<td>$30</td>
</tr>
<tr>
<td>Retail Purchases</td>
<td>$18</td>
</tr>
<tr>
<td>Transportation at Destination</td>
<td>$18</td>
</tr>
<tr>
<td>Recreation/Sightseeing/Entertainment</td>
<td>$13</td>
</tr>
</tbody>
</table>
Average Per Person Expenditures on Overnight — by Trip Purpose

Base: Total Overnight Person-Trips
Overnight Trip Characteristics
Main Purpose of Trip

Base: Overnight Person-Trips to Idaho

- Visiting friends/relatives (42%)
  - Outdoor (12%)
  - Touring (10%)
  - Special event (6%)
  - Casino (5%)
  - Theme park (5%)
  - Resort (3%)
  - City trip (2%)
  - Skiing/Snowboarding (2%)
  - Golf (1%)
  - Cruise (1%)
  - Other business trip (6%)
  - Conference/Convention (2%)
  - Business-leisure (4%)

Marketable Trips
Main Purpose of Leisure Trip — Idaho vs. National Norm

Base: Overnight Person-Trips

- Visiting friends/relatives
- Outdoors
- Touring
- Special event
- Casino
- Theme Park
- Resort
- City trip
- Skiing/Snowboarding
- Cruise
- Golf

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting friends/relatives</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Touring</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Special event</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Casino</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Theme Park</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Resort</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>City trip</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Skiing/Snowboarding</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Cruise</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Golf</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Main Purpose of Business Trip — Idaho vs. National Norm

Base: Overnight Person-Trips

Other business trip

Conference/Convention

Percent

Idaho

US Norm
State Origin Of Trip

Base: Overnight Person-Trips to Idaho

Idaho: 28%
Washington: 14%
Utah: 10%
California: 9%
Oregon: 7%
Texas: 4%
Florida: 3%
Arizona: 2%
New York: 2%
Montana: 2%
DMA Origin Of Trip

Base: Overnight Person-Trips to Idaho

- Boise, ID: 11%
- Spokane, ID/WA: 11%
- Salt Lake City, ID/UT: 10%
- Idaho Falls - Pocatello, ID: 8%
- Seattle-Tacoma, WA: 7%
- Portland, OR: 7%
- Twin Falls, ID: 4%
- Los Angeles, CA: 4%
- New York, NY: 3%
- San Francisco-Oakland-San Jose, CA: 2%
- Washington, DC: 2%
Season of Trip

Base: Overnight Person-Trips to Idaho

Percent

January-March: 20
April-June: 27
July-September: 32
October-December: 22
Method of Planning Trip

Base: Overnight Person-Trips

<table>
<thead>
<tr>
<th>Method</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>51</td>
<td>54</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Other/None</td>
<td>53</td>
<td>46</td>
</tr>
</tbody>
</table>

Percent
Method of Booking Trip

Base: Overnight Person-Trips

- Internet
  - Idaho: 49
  - US Norm: 53

- Travel Agent
  - Idaho: 11
  - US Norm: 7

- Other/None
  - Idaho: 51
  - US Norm: 44
Total Nights Away on Trip

Base: Overnight Person-Trips

Average
Idaho
= 5.3 Nights

Average
US Norm
= 3.6 Nights

<table>
<thead>
<tr>
<th>Night Range</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>19</td>
<td>24</td>
</tr>
<tr>
<td>2 nights</td>
<td>22</td>
<td>28</td>
</tr>
<tr>
<td>3-4 nights</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>7-13 nights</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>14+ nights</td>
<td>3</td>
<td>9</td>
</tr>
</tbody>
</table>
Number of Nights Spent in Idaho

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

Average Nights Spent in Idaho = 4.2

<table>
<thead>
<tr>
<th>Number of Nights</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>30</td>
</tr>
<tr>
<td>2 nights</td>
<td>27</td>
</tr>
<tr>
<td>3-4 nights</td>
<td>23</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>9</td>
</tr>
<tr>
<td>7+ nights</td>
<td>11</td>
</tr>
</tbody>
</table>
Size of Travel Party

Base: Overnight Person-Trips

Idaho
- Adults: 2.5
- Children: 1.2
- Total = 3.7

US Norm
- Adults: 2.2
- Children: 0.7
- Total = 2.9

Average No. of People

- Adults
- Children
Transportation

Base: Overnight Person-Trips

<table>
<thead>
<tr>
<th>Mode</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car/truck</td>
<td>75</td>
<td>69</td>
</tr>
<tr>
<td>Plane</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Rental car</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Camper, R.V</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Taxi Cab</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Bus</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Train</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Motorcycle</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Bicycle</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Ship/Boat</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

Percent
Accommodation

Base: Overnight Person-Trips

Friends/relatives’ dwelling (not paid for)
Motel
Hotel
Resort hotel
Campground/trailer park/RV park
Bed & breakfast
Rented cottage/cabin
Country inn/lodge
Own home/condo/apt/second home
Time share
Rented home/condo/apartment
Boat/cruise ship
Other

Percent

Idaho
US Norm
Activities and Experiences (Cont’d)

Base: Overnight Person-Trips

- Biking: Idaho 4, US Norm 8
- Boating/Sailing: Idaho 5, US Norm 8
- Business meeting: Idaho 6, US Norm 8
- Brewery: Idaho 4, US Norm 7
- Skiing/Snowboarding: Idaho 2, US Norm 7
- Art gallery: Idaho 5, US Norm 7
- Golf: Idaho 4, US Norm 7
- Fair/Exhibition/Festival: Idaho 4, US Norm 7
- Mountain climbing: Idaho 2, US Norm 7
- Spa: Idaho 5, US Norm 6
- Rodeo: Idaho 1, US Norm 6
- Dance: Idaho 5, US Norm 6
- Watch/Participate in Kids Sports Event: Idaho 2, US Norm 6
- Rafting: Idaho 1, US Norm 6
- Winery: Idaho 4, US Norm 6

Percent

- Idaho
- US Norm
Activities and Experiences (Cont’d)

Base: Overnight Person-Trips

- Rock/Pop concert
- Watch Amateur/Youth Sports
- Hunting
- Pro/College sports event
- Birding
- Participate in Adult Sports Event
- Convention/conference
- Symphony
- Motorcycle touring
- Trade show
- Tennis
- Participate in Amateur/Youth Sports
- Opera

Percent

0 10 20 30 40

Idaho
US Norm
Activities of Special Interest

Base: Overnight Person-Trips

- Historic places
- Cultural activities/attractions
- Exceptional culinary experiences
- Eco-tourism
- Winery tours/Wine tasting
- Traveling with grandchildren

Percent

<table>
<thead>
<tr>
<th>Activity</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic places</td>
<td>33</td>
<td>25</td>
</tr>
<tr>
<td>Cultural activities/attractions</td>
<td>24</td>
<td>23</td>
</tr>
<tr>
<td>Exceptional culinary experiences</td>
<td>13</td>
<td>16</td>
</tr>
<tr>
<td>Eco-tourism</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Winery tours/Wine tasting</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Traveling with grandchildren</td>
<td>6</td>
<td>10</td>
</tr>
</tbody>
</table>
Online Social Media Use by Travelers

Base: Overnight Person-Trips

- Used any social media for travel: Idaho 75%, US Norm 72%
- Used Smartphone while traveling: Idaho 48%, US Norm 29%
- Posted travel photos/video online: Idaho 33%, US Norm 24%
- Read travel reviews: Idaho 24%, US Norm 24%
- Looked at travel photos/video online: Idaho 23%, US Norm 20%
- Accessed travel news/events/deals/promotions: Idaho 18%, US Norm 18%
- Connected with others interested in travel: Idaho 13%, US Norm 12%
- Got travel advice: Idaho 17%, US Norm 10%
Online Social Media Use by Travelers (Cont’d)

Base: Overnight Person-Trips

- Used any social media for travel: 75% (Idaho), 72% (US Norm)
- Read a travel blog: 12% (Idaho), 12% (US Norm)
- Tweeted about a trip: 9% (Idaho), 12% (US Norm)
- Followed a destination/attraction: 11% (Idaho), 11% (US Norm)
- Contributed travel reviews: 8% (Idaho), 10% (US Norm)
- Gave travel advice: 9% (Idaho), 8% (US Norm)
- Blogged about a trip: 9% (Idaho), 6% (US Norm)
- Subscribed to a travel e-newsletter: 9% (Idaho), 6% (US Norm)
Day Trip Detail
Day Trip Expenditures
Total Day Trip Spending — by Sector

Total Spending = $1 Billion

- **Restaurant Food & Beverage**
  - 29%
  - $290 Million

- **Retail**
  - 28%
  - $286 Million

- **Transportation**
  - 27%
  - $268 Million

- **Recreation**
  - 16%
  - $158 Million
Average Per Person Expenditures on Day Trips — By Sector

Base: Total Day Person-Trips

<table>
<thead>
<tr>
<th>Sector</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant Food &amp; Beverage</td>
<td>$15</td>
</tr>
<tr>
<td>Retail Purchases</td>
<td>$15</td>
</tr>
<tr>
<td>Transportation at Destination</td>
<td>$14</td>
</tr>
<tr>
<td>Recreation/ Sightseeing/</td>
<td>$8</td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
</tr>
</tbody>
</table>
Average Per Person Expenditures on Day Trip — by Trip Purpose

Base: Total Day Person-Trips

<table>
<thead>
<tr>
<th>Trip Purpose</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td>$53</td>
</tr>
<tr>
<td>Business</td>
<td>$61</td>
</tr>
</tbody>
</table>
Day Trip Characteristics
Main Purpose of Trip

Base: Day Person-Trips to Idaho

- Visiting friends/relatives: 32%
- Outdoors: 14%
- Touring: 13%
- Shopping: 9%
- City trip: 6%
- Casino: 5%
- Special event: 4%
- Cruise: 2%
- Golf: 2%
- Theme Park: 1%
- Skiing/Snowboarding: 1%
- Resort: 1%
- Other business trip: 6%
- Conference/convention: 1%
- Business-leisure: 4%
Main Purpose of Leisure Trip — Idaho vs. National Norm

Base: Day Person-Trips

- **Visiting friends/relatives**: 32% (Idaho) vs. 38% (US Norm)
- **Outdoors**: 10% (Idaho) vs. 13% (US Norm)
- **Touring**: 14% (Idaho) vs. 13% (US Norm)
- **Shopping**: 9% (Idaho) vs. 8% (US Norm)
- **City trip**: 8% (Idaho) vs. 7% (US Norm)
- **Casino**: 5% (Idaho) vs. 7% (US Norm)
- **Special event**: 4% (Idaho) vs. 8% (US Norm)
- **Cruise**: 2% (Idaho) vs. 8% (US Norm)
- **Golf**: 2% (Idaho) vs. 1% (US Norm)
- **Theme Park**: 4% (Idaho) vs. 1% (US Norm)
- **Skiing/Snowboarding**: 2% (Idaho) vs. 1% (US Norm)
- **Resort**: 1% (Idaho) vs. 1% (US Norm)

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

Base: Day Person-Trips

Other business trip

Conference/Convention

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference/Convention</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Other business trip</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

Percent

- Idaho
- US Norm
State Origin Of Trip

Base: Day Person-Trips to Idaho

- Idaho: 47%
- Washington: 15%
- Utah: 10%
- Oregon: 6%
- California: 4%
- Montana: 3%
DMA Origin Of Trip

Base: Day Person-Trips to Idaho

- Boise, ID: 25%
- Spokane, ID/WA: 21%
- Salt Lake City, ID/UT: 10%
- Twin Falls, ID: 6%
- Seattle-Tacoma, WA: 4%
- Portland, OR: 3%
- Los Angeles, CA: 2%
- Missoula, MT: 2%
Season of Trip

Base: Day Person-Trips to Idaho

- January-March: 25%
- April-June: 24%
- July-September: 27%
- October-December: 24%

Percent
Size of Travel Party

Base: Day Person-Trips

Idaho
- Adults: 2.1
- Children: 0.8
- Total = 2.9

US Norm
- Adults: 2.2
- Children: 0.6
- Total = 2.8

Average No. of People
- Adults
- Children
Activities and Experiences

Base: Day Person-Trips

- Shopping: Idaho 24, US Norm 27
- Hiking/backpacking: Idaho 11, US Norm 9
- National/State Park: Idaho 9, US Norm 13
- Fine dining: Idaho 9, US Norm 9
- Landmark/historic site: Idaho 8, US Norm 9
- Swimming: Idaho 7, US Norm 9
- Fishing: Idaho 8, US Norm 9
- Casino: Idaho 3, US Norm 8
- Camping: Idaho 7, US Norm 8
- Beach/waterfront: Idaho 6, US Norm 7
- Museum: Idaho 7, US Norm 7
- Fair/exhibition/festival: Idaho 3, US Norm 7
- Business Meeting: Idaho 4, US Norm 4
- Watch Amateur/Youth Sports: Idaho 4, US Norm 4
- Boating/sailing: Idaho 2, US Norm 4

Percent
Activities and Experiences (Cont’d)

Base: Day Person-Trips

- Skiing/Snowboarding
- Biking
- Bar/disco/nightclub
- Theater
- Theme park
- Art gallery
- Golf
- Zoo
- Spa
- Birding
- Hunting
- Convention/Conference
- Dance
- Rodeo
- Rafting

Percent

<table>
<thead>
<tr>
<th>Activity</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skiing/Snowboarding</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Biking</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Theater</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Theme park</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Art gallery</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Golf</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Zoo</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Spa</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Birding</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Hunting</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Convention/Conference</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Dance</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Rodeo</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Rafting</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Activities and Experiences (Cont’d)

Base: Day Person-Trips

Brewery: 2
Mountain Climbing: 2
Trade Show: 2
Rock/Pop Concert: 2
Participate Amateur/Youth Sports: 2
Tennis: 1
Pro/college sports event: 2
Motorcycle Touring: 2
Winery: 2
Participated in Adult Sports Event: 3
Participated/Watched Kids Sports Event: 2
Opera: 1
Symphony: 1

Percent

0 10 20 30 40

Idaho
US Norm
Activities of Special Interest

Base: Day Person-Trips

- Historic places
- Cultural activities/attractions
- Eco-Tourism
- Exceptional culinary experiences
- Traveling with grandchildren
- Winery tours/wine tasting

<table>
<thead>
<tr>
<th>Activity</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic places</td>
<td>25</td>
<td>16</td>
</tr>
<tr>
<td>Cultural activities/attractions</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Eco-Tourism</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Exceptional culinary experiences</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Traveling with grandchildren</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Winery tours/wine tasting</td>
<td>6</td>
<td>5</td>
</tr>
</tbody>
</table>

Percent
Social Media Use by Travelers

Base: Day Person-Trips

- Used any social media for travel
- Used Smartphone while traveling
- Posted travel photos/video online
- Looked at travel photos/video online
- Read travel reviews online
- Accessed travel deals/news/promotions
- Connected to others interested in travel
- Read a travel blog

<table>
<thead>
<tr>
<th>Activity</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used any social media for travel</td>
<td>67</td>
<td>68</td>
</tr>
<tr>
<td>Used Smartphone while traveling</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>Posted travel photos/video online</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Looked at travel photos/video online</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>Read travel reviews online</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>Accessed travel deals/news/promotions</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Connected to others interested in travel</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Read a travel blog</td>
<td>0</td>
<td>11</td>
</tr>
</tbody>
</table>

Percent
Social Media Use by Travelers (Cont’d)

Base: Day Person-Trips

- Used any social media for travel
- Got travel advice via social networking
- Followed a destination/attraction
- Contributed travel reviews online
- Gave travel advice via social networking
- Tweeted about a trip
- Subscribed to a travel e-newsletter
- Blogged about a trip

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
<th>Idaho</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used any social media for travel</td>
<td>67</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Got travel advice via social networking</td>
<td>11</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Followed a destination/attraction</td>
<td>10</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Contributed travel reviews online</td>
<td>10</td>
<td>7</td>
<td>10</td>
</tr>
<tr>
<td>Gave travel advice via social networking</td>
<td>8</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Tweeted about a trip</td>
<td>7</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Subscribed to a travel e-newsletter</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Blogged about a trip</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>
Demographic Profile of Visitors to Idaho
Base: Total Person-Trips to Idaho

Gender

Female
- Day: 51%
- Overnight: 48%

Male
- Day: 49%
- Overnight: 52%
**Age**

Base: Total Person-Trips to Idaho

**Average Day = 44**

**Average ON = 42**

- **18-24**
  - Day: 15%
  - Overnight: 19%

- **25-44**
  - Day: 38%
  - Overnight: 38%

- **45-64**
  - Day: 28%
  - Overnight: 33%

- **65 or older**
  - Day: 14%
  - Overnight: 15%

**Percent**

- **Day**
- **Overnight**
Household Size

Base: Total Person-Trips to Idaho

- 1 member: Day (17), Overnight (20)
- 2 members: Day (17), Overnight (32)
- 3 members: Day (15), Overnight (17)
- 4 members: Day (15), Overnight (15)
- 5+ members: Day (16), Overnight (18)

Percent for Day (yellow) and Overnight (purple)
Household Income

Base: Total Person-Trips to Idaho

- $150K+: 2 Day, 5 Overnight
- $100-$149.9K: 9 Day, 13 Overnight
- $75K-$99.9K: 10 Day, 10 Overnight
- $50K-$74.9K: 21 Day, 22 Overnight
- Under $49.9K: 50 Day, 58 Overnight
Marital Status

Base: Total Person-Trips to Idaho

- **Married/ with partner**
  - Percent: 61
  - Day: 65

- **Single/Never Married**
  - Percent: 22
  - Day: 20

- **Separated/Divorced/Widowed**
  - Percent: 19
  - Day: 13

Legend:
- **Yellow**: Day
- **Blue**: Overnight
Children in Household

Base: Total Person-Trips to Idaho

- **No Children Under 18**: 51% Day, 53% Overnight
- **Any child between 13-17**: 24% Day, 24% Overnight
- **Any child between 6-12**: 26% Day, 24% Overnight
- **Any child under 6**: 22% Day, 22% Overnight

Percent

Day | Overnight
---|---
0 | 20
20 | 40
40 | 60
60 | 80
Base: Total Person-Trips to Idaho

- **Post-graduate**: 13% Day, 16% Overnight
- **College graduate**: 32% Day, 32% Overnight
- **Some college**: 33% Day, 33% Overnight
- **High school or less**: 22% Day, 19% Overnight
Employment

Base: Total Person-Trips to Idaho

- **Full-time/Self-employed**: 38% Day, 41% Overnight
- **Part-time**: 13% Day, 14% Overnight
- **Not employed/Retired/Student/Other**: 49% Day, 45% Overnight

Percent
Race

Base: Total Person-Trips to Idaho

White

African-American

Other

Percent

Day

Overnight

0 20 40 60 80 100

89

85

3

4

8

11

Percent

Day

Overnight
Hispanic Background

Base: Total Person-Trips to Idaho

- No: 92% Day, 87% Overnight
- Yes: 8% Day, 13% Overnight

Day and Overnight percentages for Hispanic background.
Key Takeaways

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