



Travel USA Visitor Profile



2023

Idaho Visitation Report Table of Contents

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Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- An **overnight trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one or 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.
- This report provides an overview for Idaho's domestic tourism business in 2023.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Idaho, the following sample was achieved in 2023:



Overnight Base Size

1,519



Day Base Size

763

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

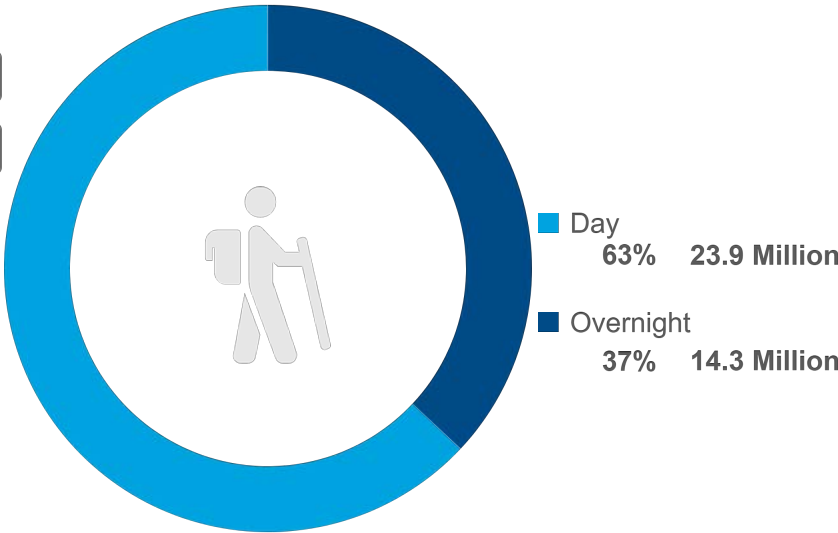
Total Size of Idaho 2023 Domestic Travel Market

Total Person-Trips

38.2 Million

+3.3% vs. 2021

+7.9% vs. 2019



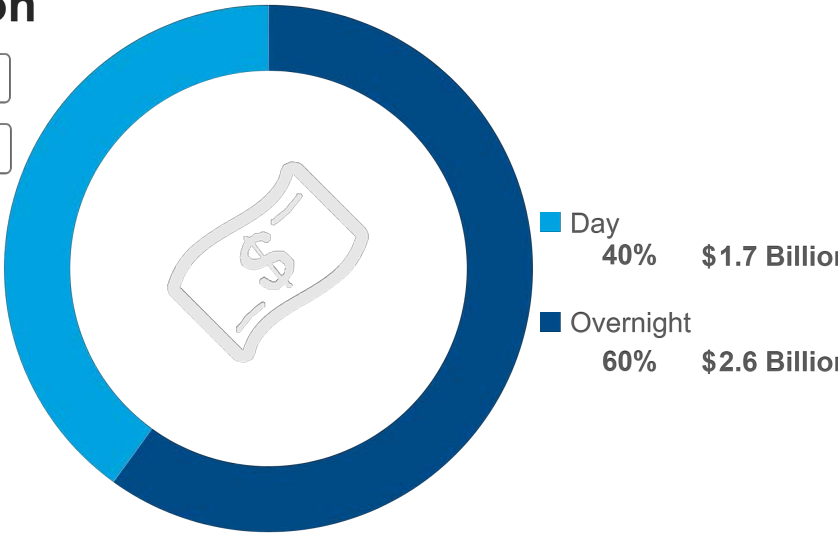
Total Expenditures for Idaho 2023 Domestic Travel Market

Total Spending

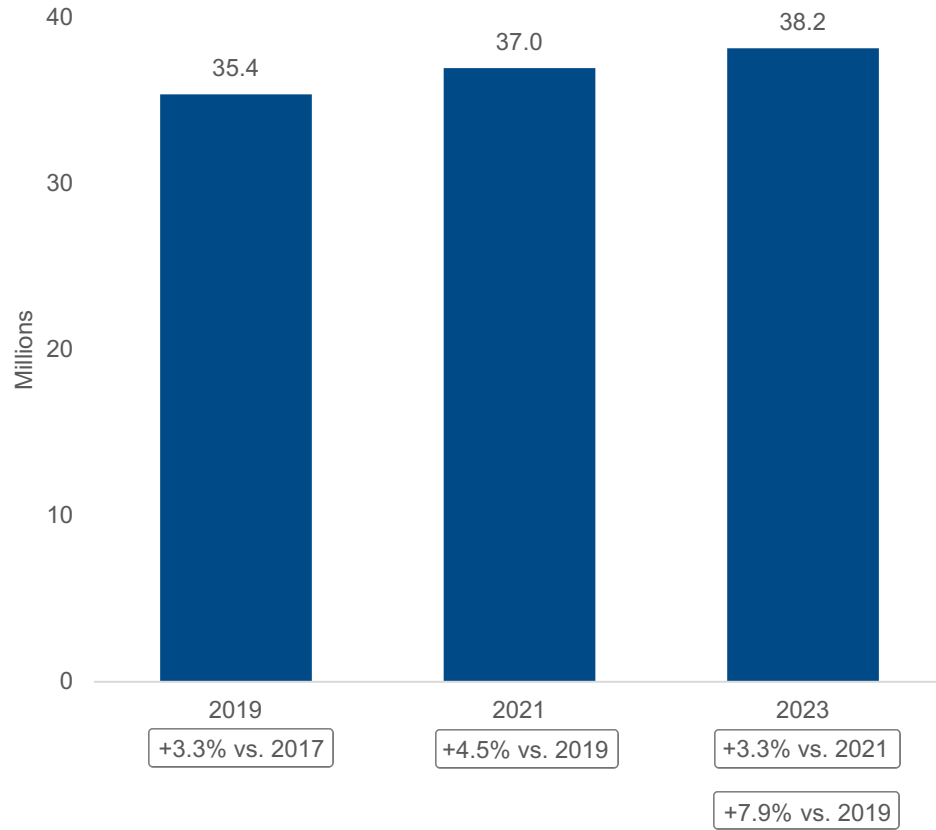
\$ 4.3 Billion

+15.0% vs. 2021

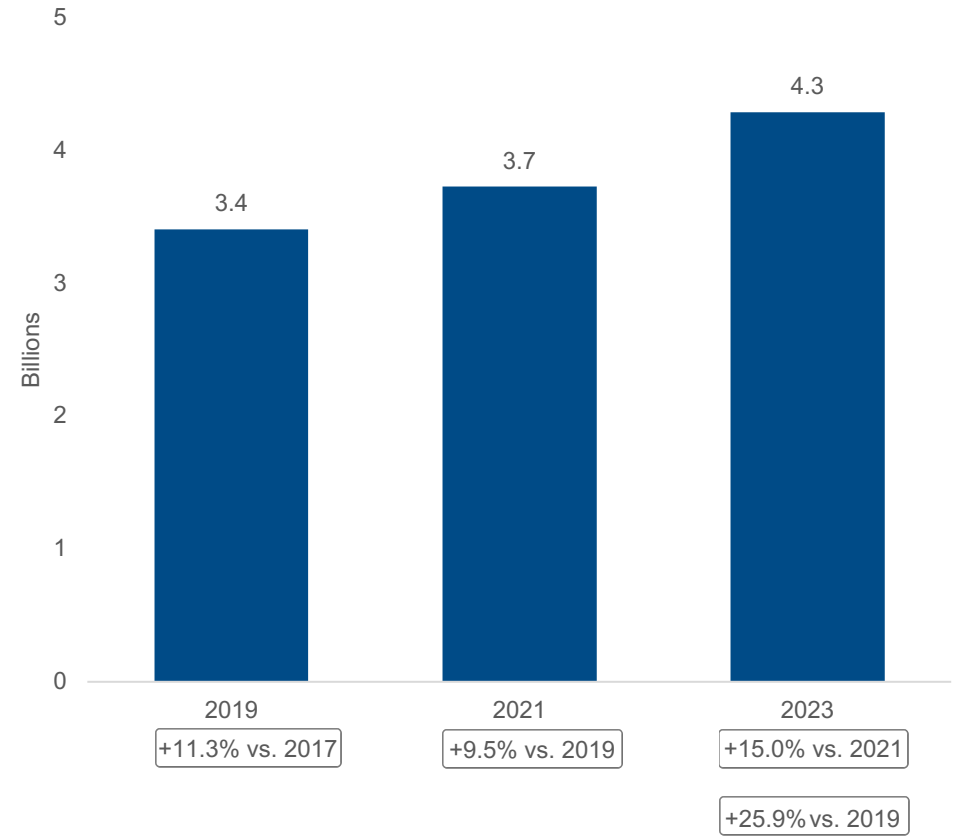
+25.9% vs. 2019



Total Size of Idaho 2023 Domestic Travel Market



Total Expenditures for Idaho 2023 Domestic Travel Market





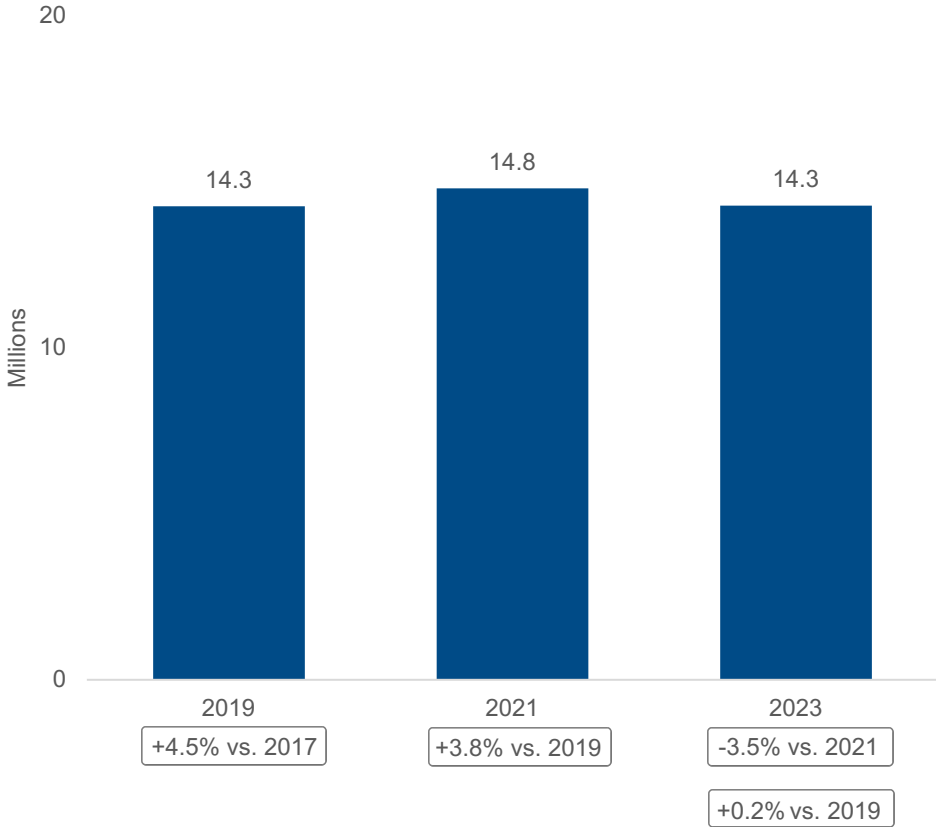
Travel USA Visitor Profile

Overnight Visitation



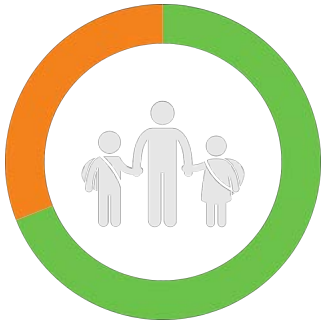
2023

Overnight Trips to Idaho



Size of Idaho Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips
14.3 Million



Adults	69%	9.9 Million
Children	31%	4.4 Million

Past Visitation to Idaho

87% of overnight travelers to Idaho are repeat visitors

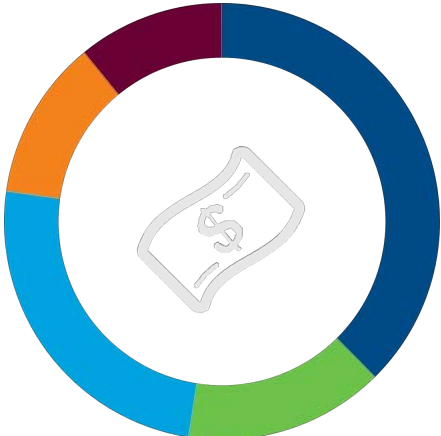
66% of overnight travelers to Idaho had visited before in the past 12 months

Domestic Overnight Expenditures - by Sector

Total Spending
\$ 2.576 Billion

+9.7% vs. 2021

+22.0% vs. 2019



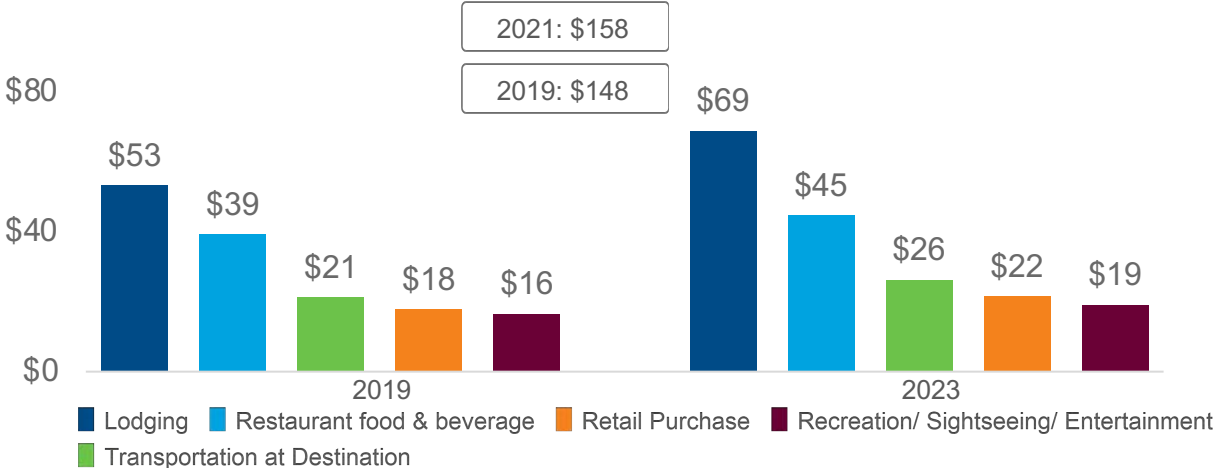
Lodging	38%	\$984 Million
Transportation at Destination	15%	\$375 Million
Restaurant Food & Beverage	25%	\$637 Million
Retail Purchase	12%	\$308 Million
Recreation/Entertainment	11%	\$272 Million

vs. 2021
+8.6%
+14.0%
+9.6%
+8.8%
+9.3%







vs. 2019
+29.7%
+23.8%
+14.0%
+20.7%
+15.9%

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

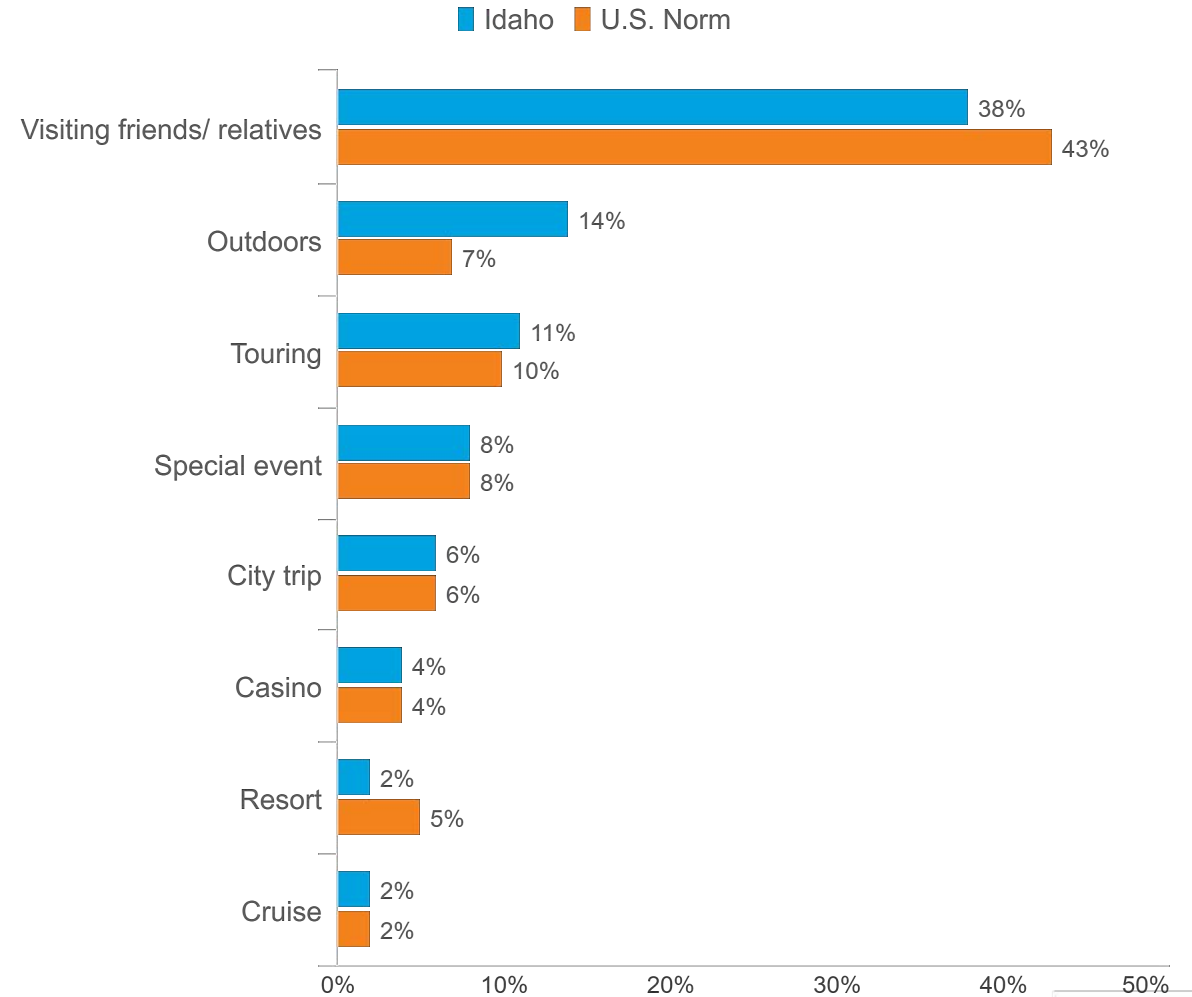
Average Per Person Per Trip: \$ 180



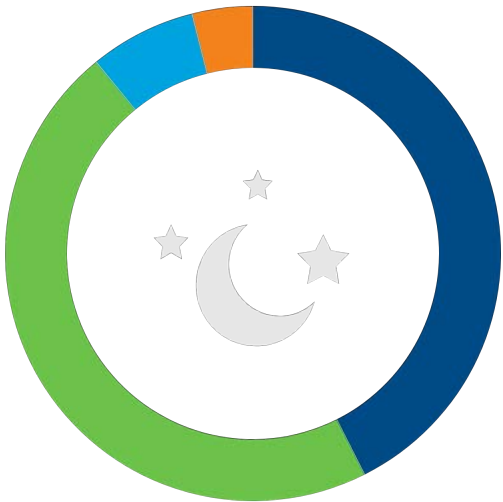
Main Purpose of Trip

 38% Visiting friends/ relatives	
 14% Outdoors	 2% Conference/ Convention
 11% Touring	
 8% Special event	 6% Other business trip
 6% City trip	
 4% Casino	
 2% Resort	 4% Business-Leisure
 2% Cruise	

Main Purpose of Leisure Trip

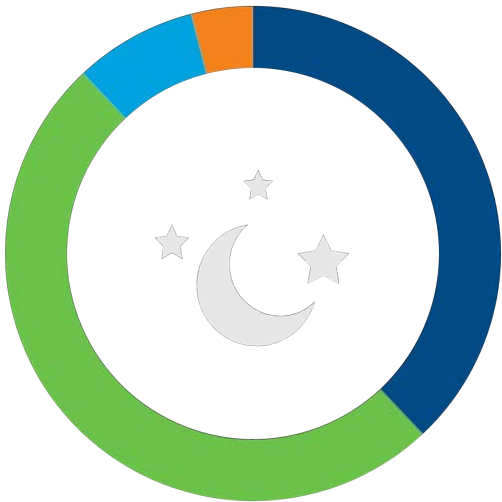


2023 U.S. Overnight Trips



■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

2023 Idaho Overnight Trips

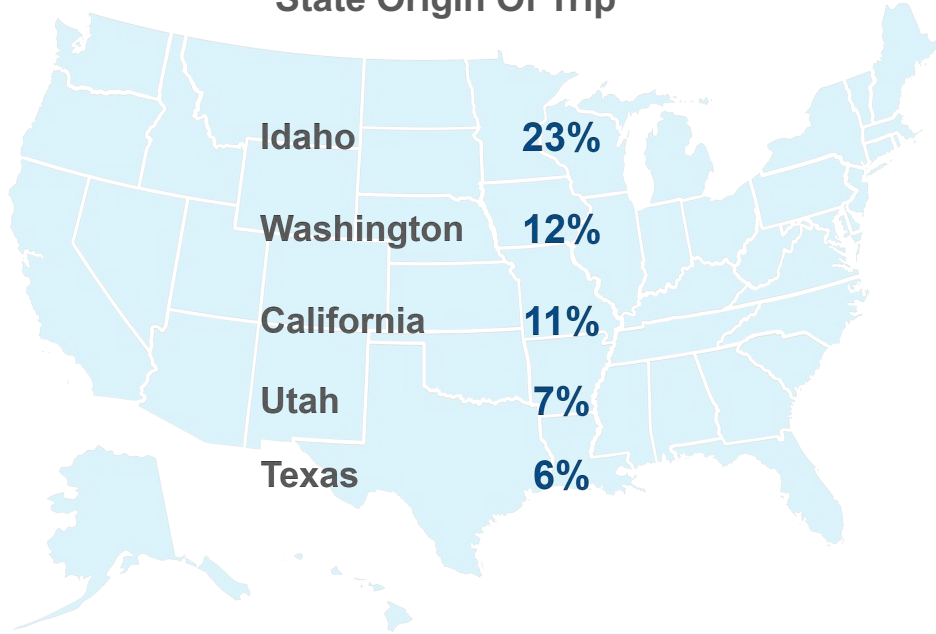


■ Visiting friends/relatives	38%
■ Marketable	50%
■ Business	8%
■ Business-leisure	4%

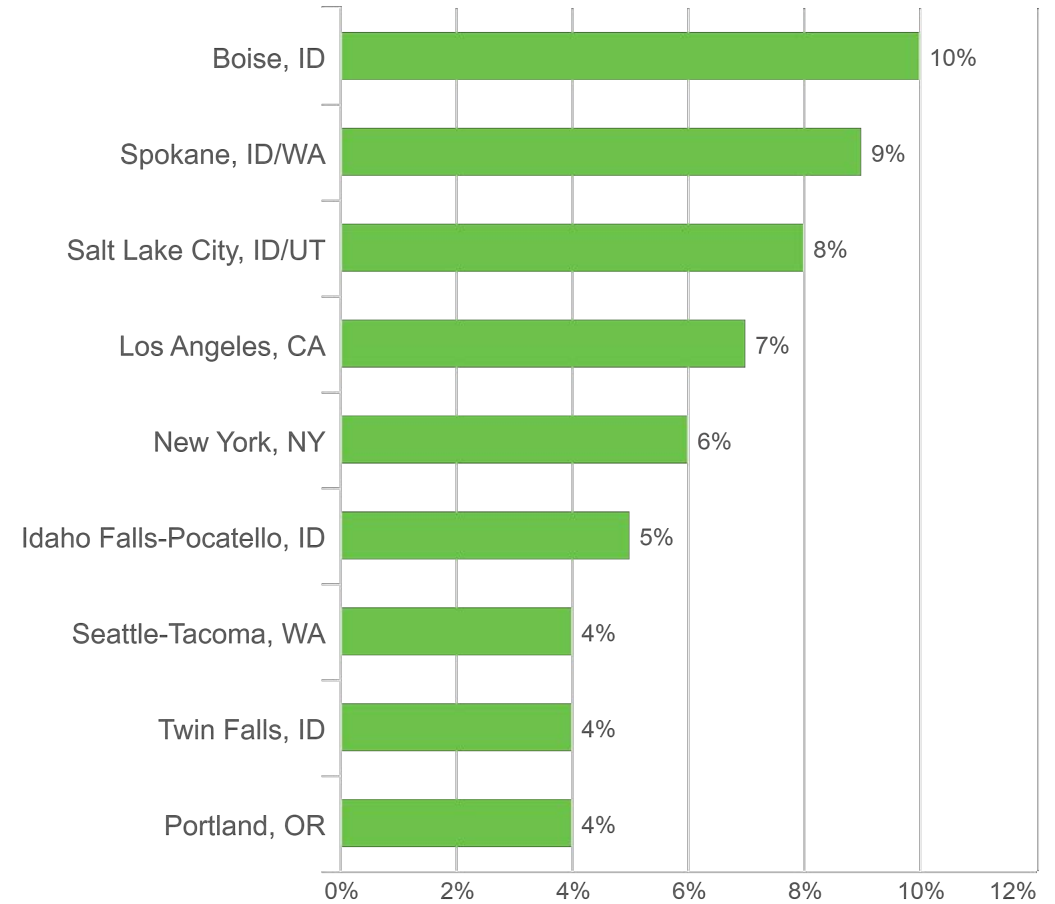
Idaho's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

State Origin Of Trip



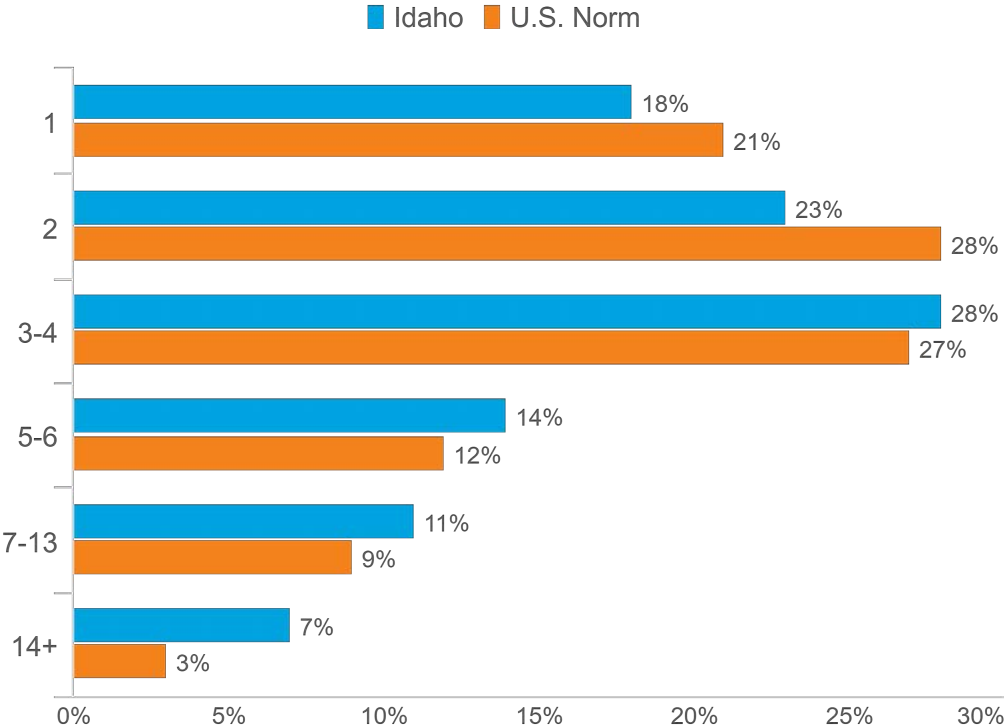
DMA Origin Of Trip



Season of Trip Total Overnight Person-Trips



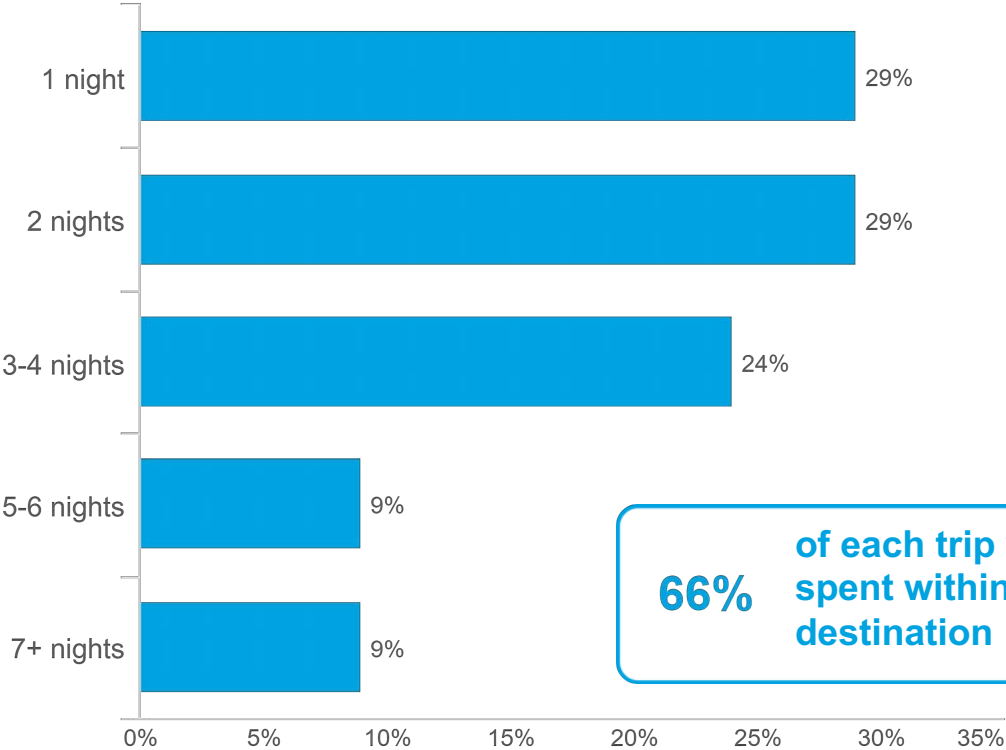
Total Nights Away on Trip



Idaho
4.7
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Idaho



66% of each trip was spent within the destination

Average number of nights
3.1

Size of Travel Party

■ Adults ■ Children

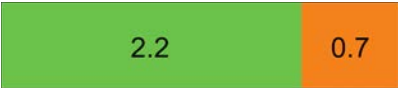
Idaho



Total **3.1**

Average number of people

U.S. Norm



Total **2.9**

Average number of people

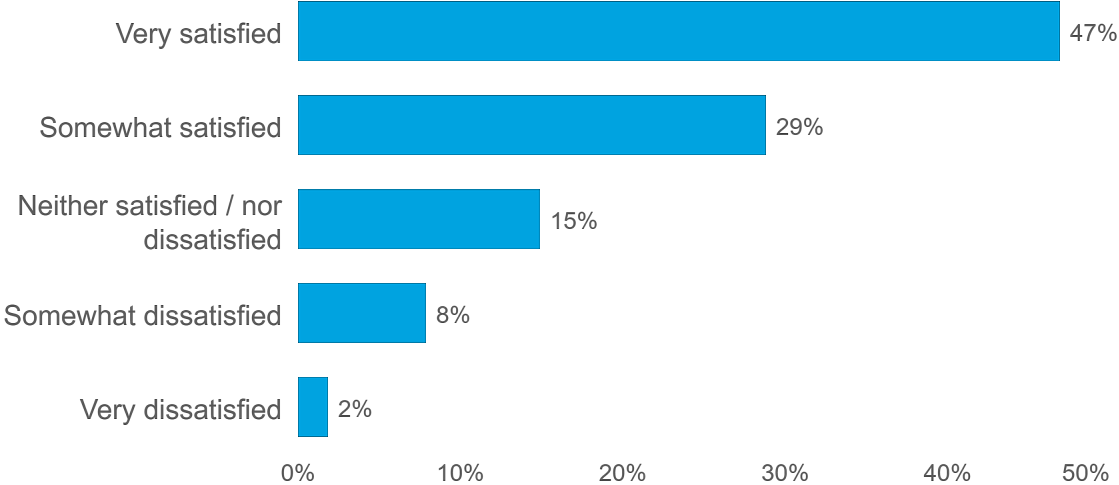


25% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



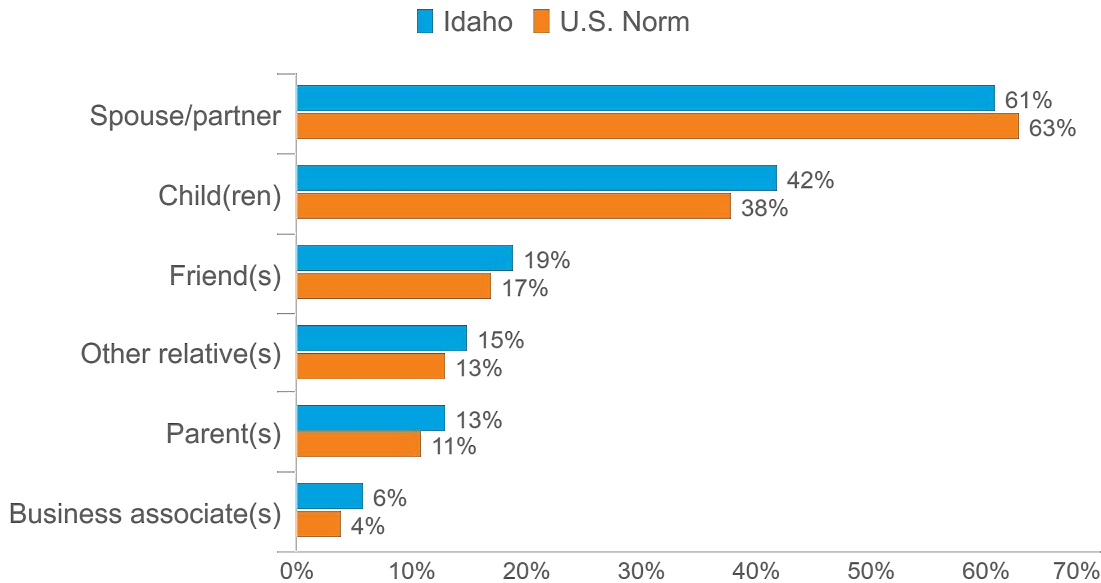


21% of trips only had one person in the travel party

U.S. Norm: 24%

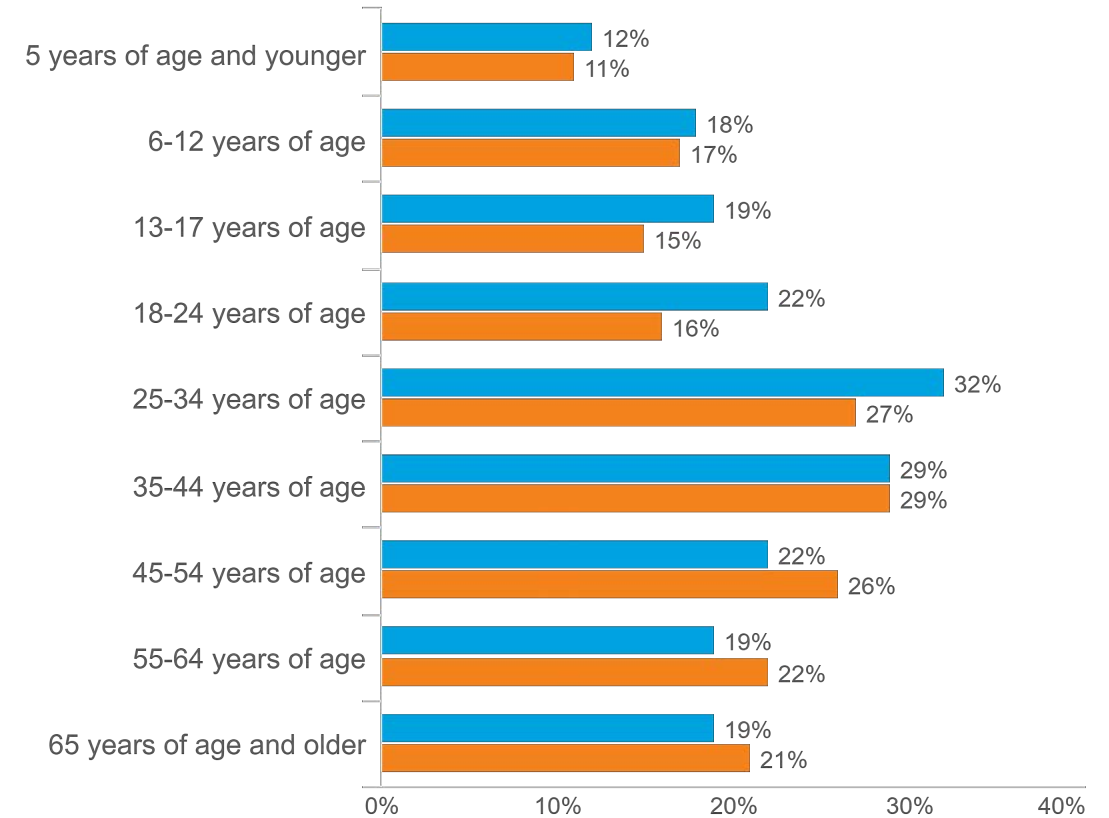
Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



Travel Party Age

Idaho U.S. Norm



Transportation Used to get to Destination

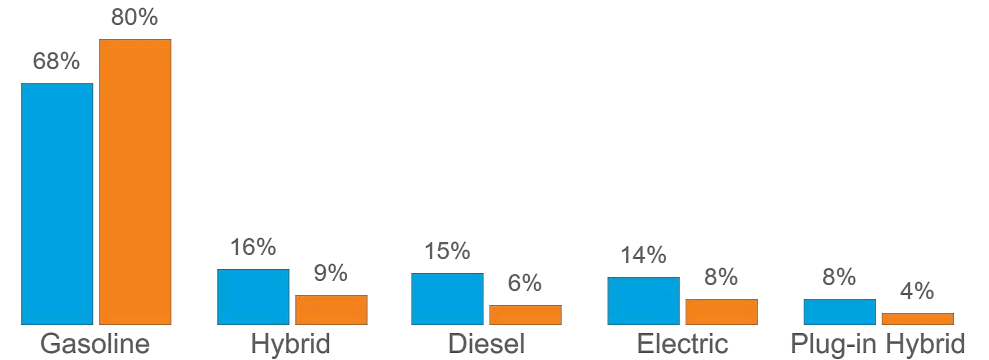
74% of overnight travelers use own car/truck to get to their destination

U.S. Norm: 69%

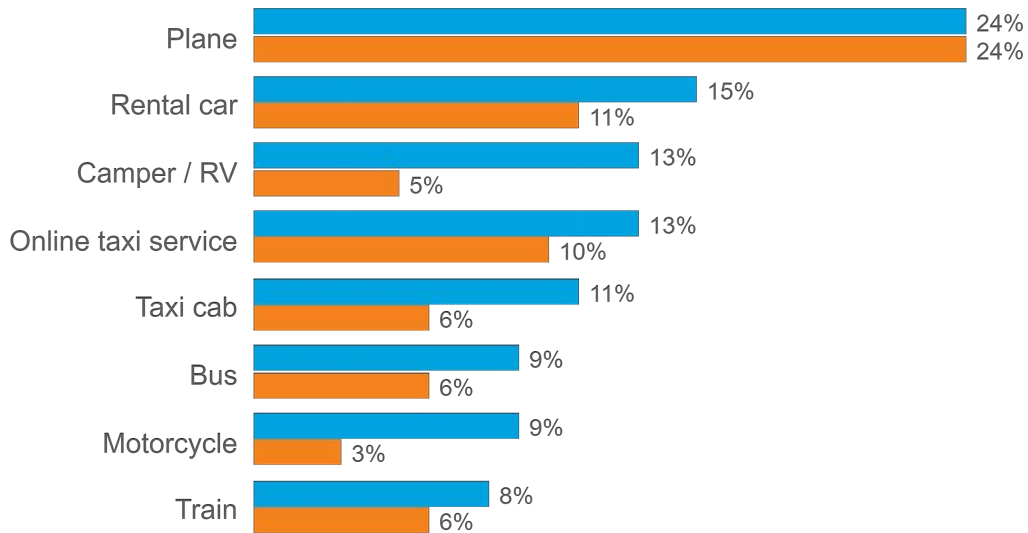


Type of Vehicle Used to get to Destination

■ Idaho ■ U.S. Norm

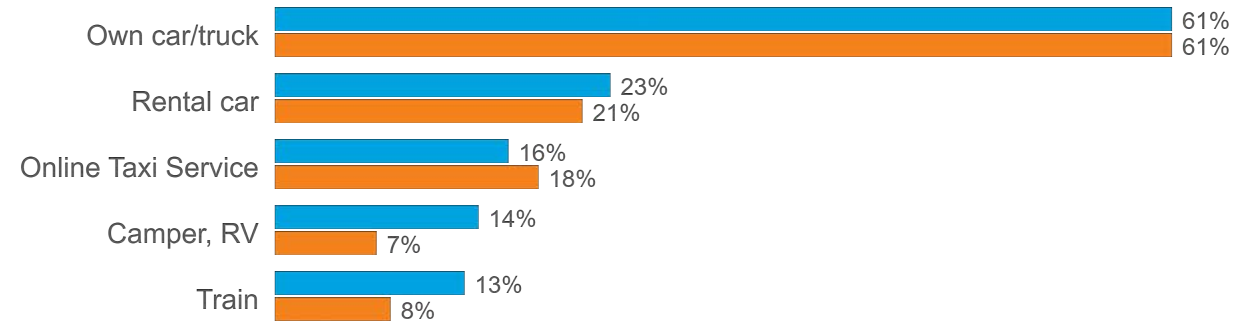


■ Idaho ■ U.S. Norm

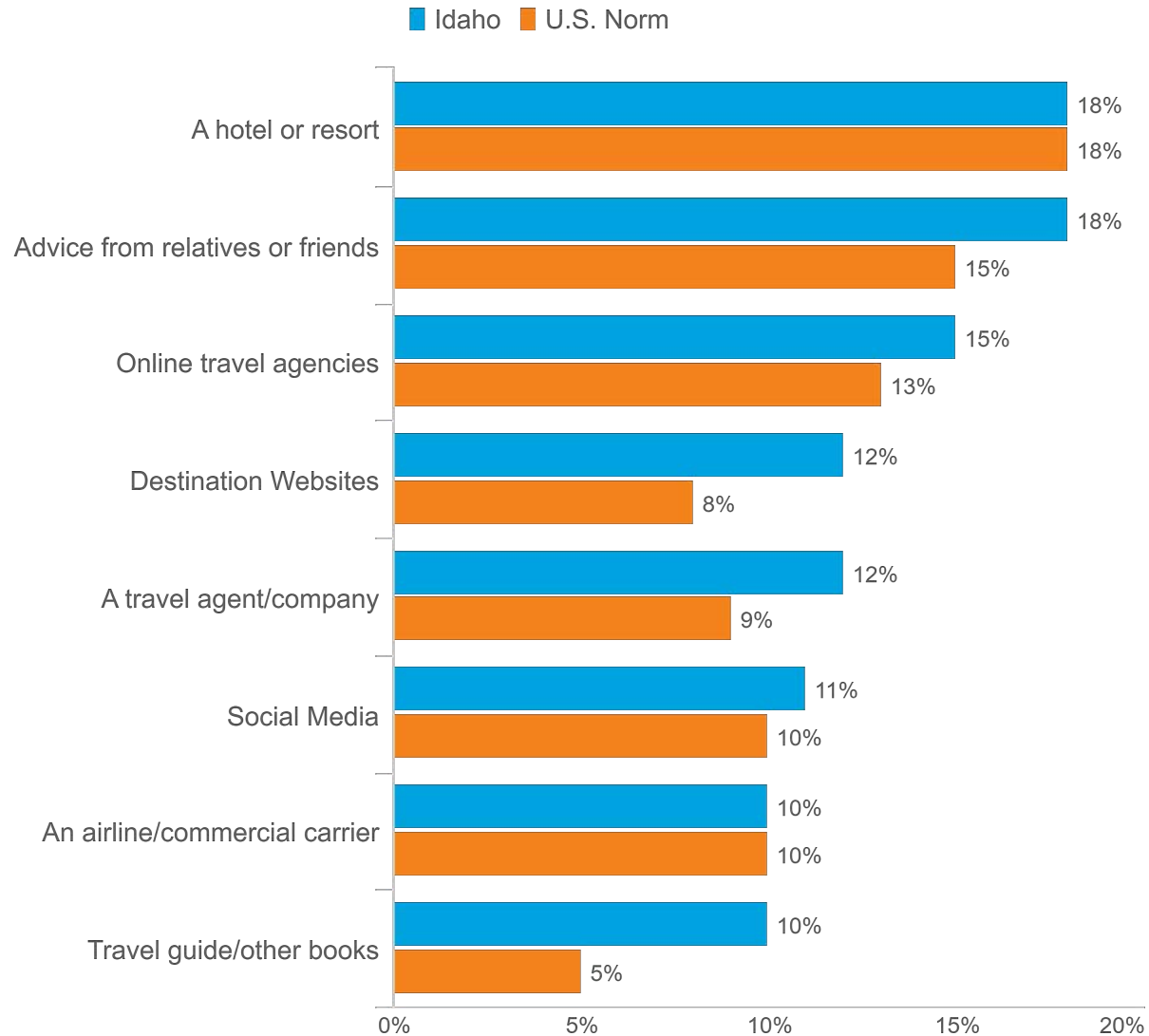


Transportation Used within Destination

■ Idaho ■ U.S. Norm



Trip Planning Information Sources



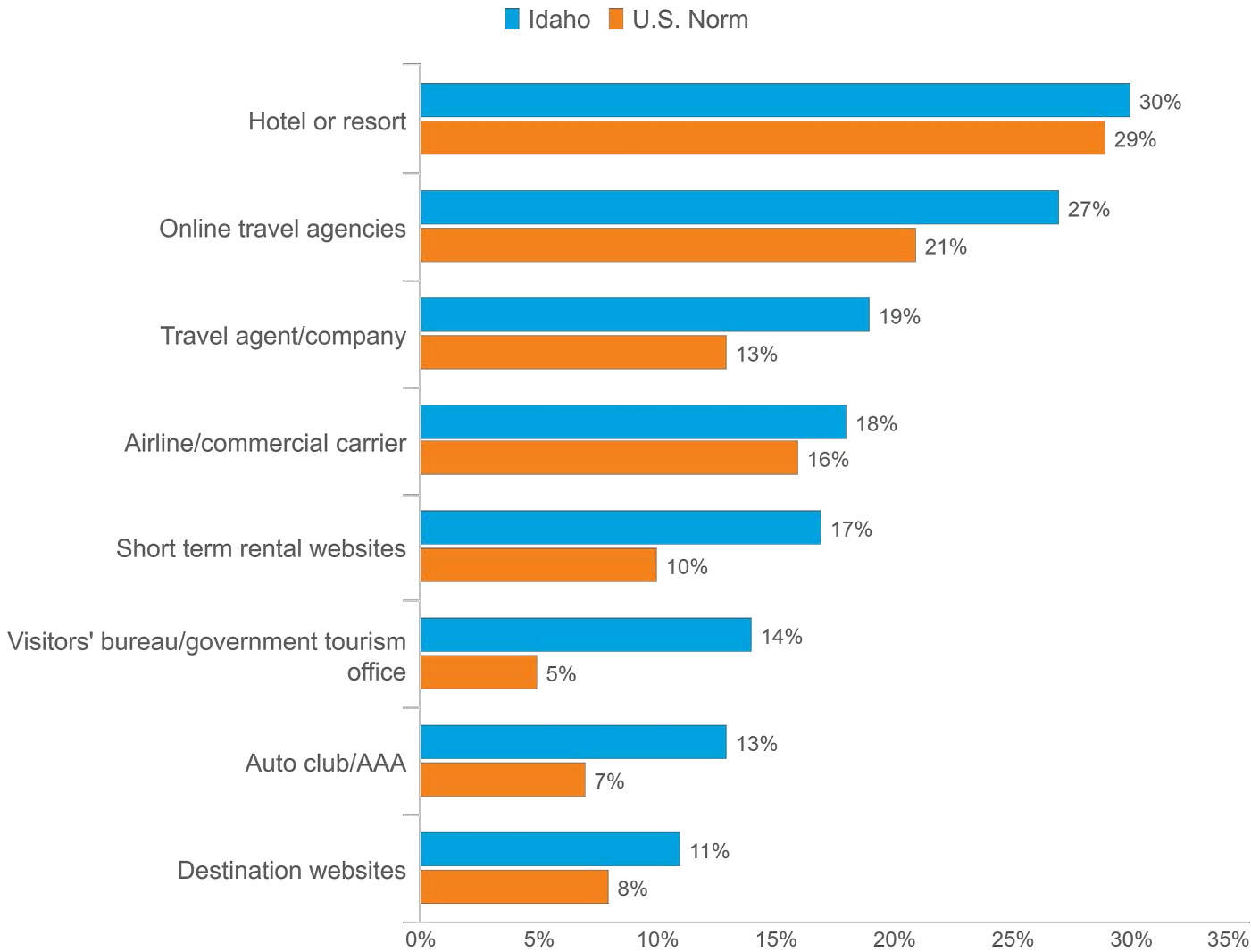
Length of Trip Planning

	Idaho	U.S. Norm
1 month or less	31%	33%
2 months	15%	17%
3-5 months	19%	18%
6-12 months	14%	13%
More than 1 year in advance	5%	4%
Did not plan anything in advance	15%	15%








Idaho's Overnight Trip Characteristics

Base: 2023 Overnight Person-Trips

Method of Booking



Accommodations

	Idaho	U.S. Norm
 Hotel	38%	42%
 Home of friends / relatives	23%	22%
 Motel	19%	11%
 Campground / RV park	15%	5%
 Rented home / condo / apartment	12%	7%
 Bed & breakfast	12%	6%
 Resort hotel	11%	10%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities










U.S. Norm: 15%

Activities and Experiences (Top 10)







	Idaho	U.S. Norm
Sightseeing	24%	20%
Shopping	22%	26%
Attending celebration	21%	15%
Landmark/historic site	19%	13%
National/state park	15%	8%
Nature tours/wildlife viewing/birding	15%	8%
Hiking/backpacking	15%	8%
Local parks/playgrounds	14%	10%
Museum	13%	11%
Bar/nightclub	13%	15%

Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Idaho	U.S. Norm
 Shopping at locally owned businesses	55%	48%
 Convenience/grocery shopping	52%	42%
 Big box stores (Walmart, Costco)	48%	30%
 Outlet/mall shopping	43%	44%
 Souvenir shopping	39%	38%
 Farmers market	27%	17%
 Antiquing	16%	12%

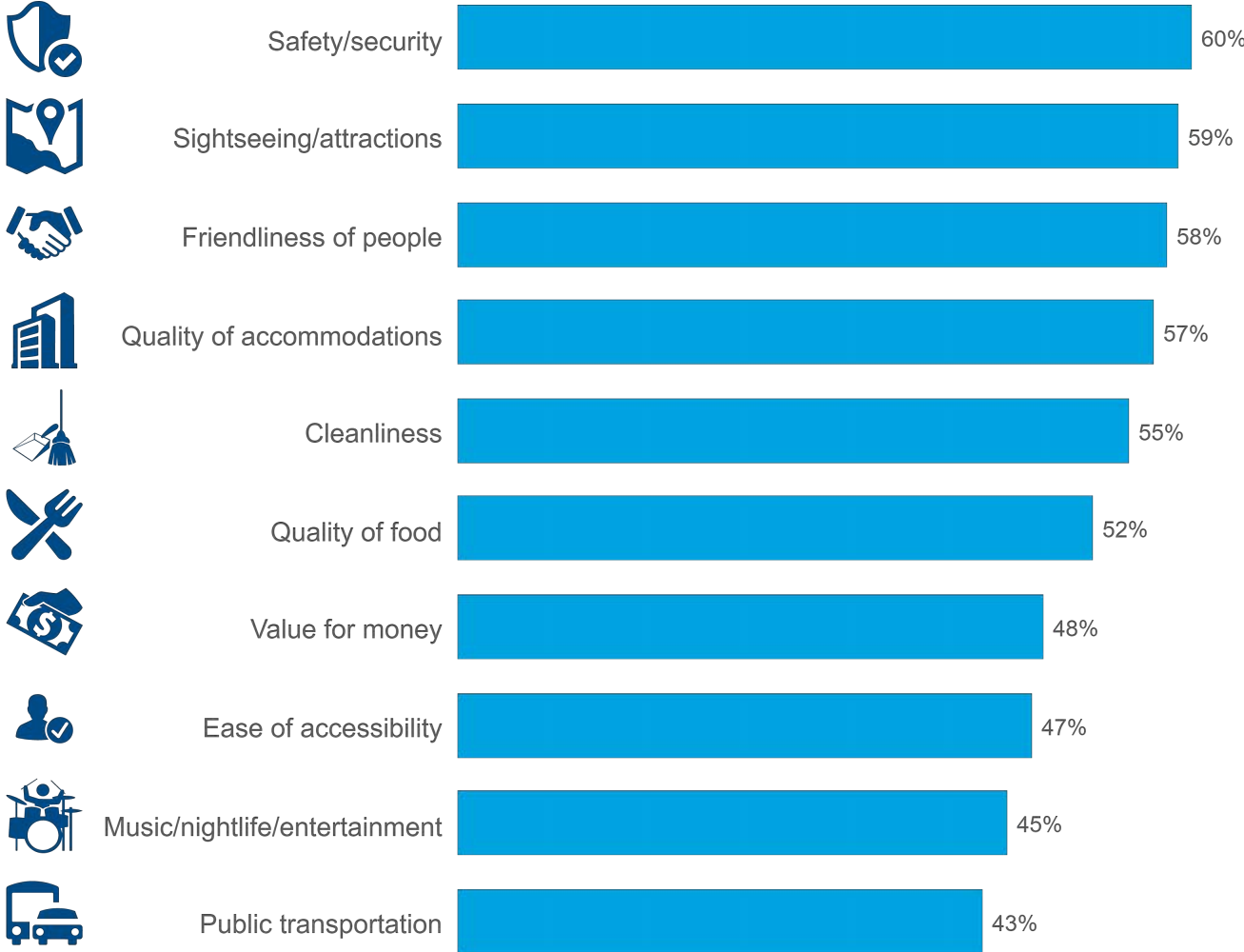
Dining Types on Trip

	Idaho	U.S. Norm
 Casual dining	52%	56%
 Fast food	50%	45%
 Unique/local food	31%	30%
 Carry-out/food delivery service	23%	22%
 Picnicking	22%	11%
 Fine/upscale dining	18%	19%



75%
of overnight travelers were
very satisfied with their overall
trip experience

% Very Satisfied with Trip*



0% 10% 20% 30% 40% 50% 60% 70%

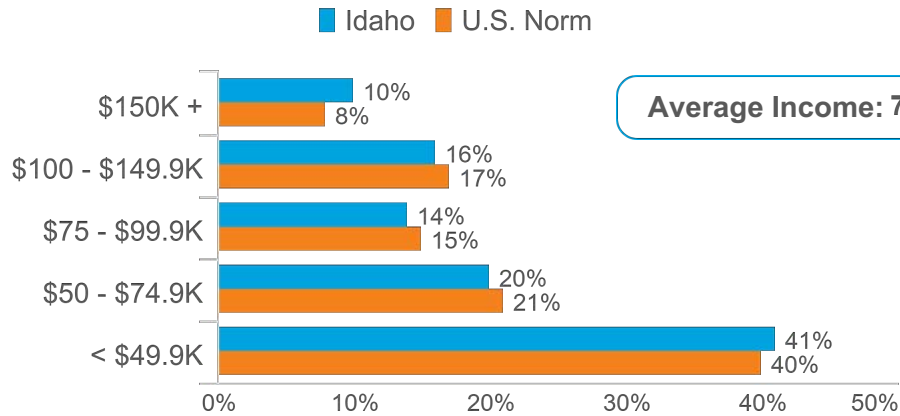
*Very satisfied = selected top box on a five point scale
Ease of Accessibility only asked to those with travel limiting disabilities within travel party



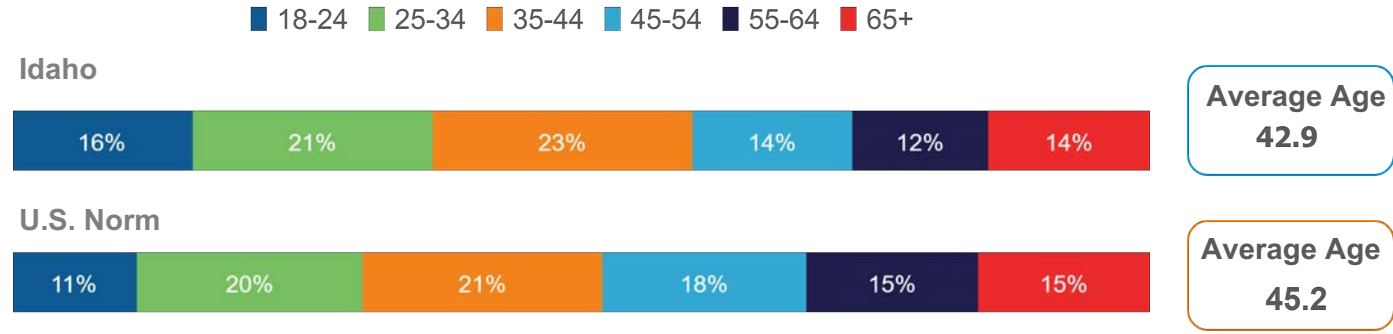
Demographic Profile of Overnight Idaho Visitors

Base: 2023 Overnight Person-Trips

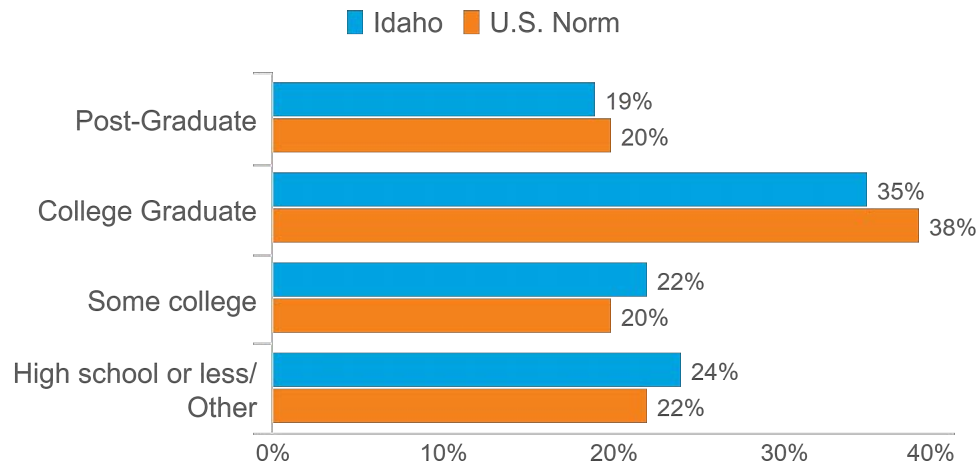
Household Income



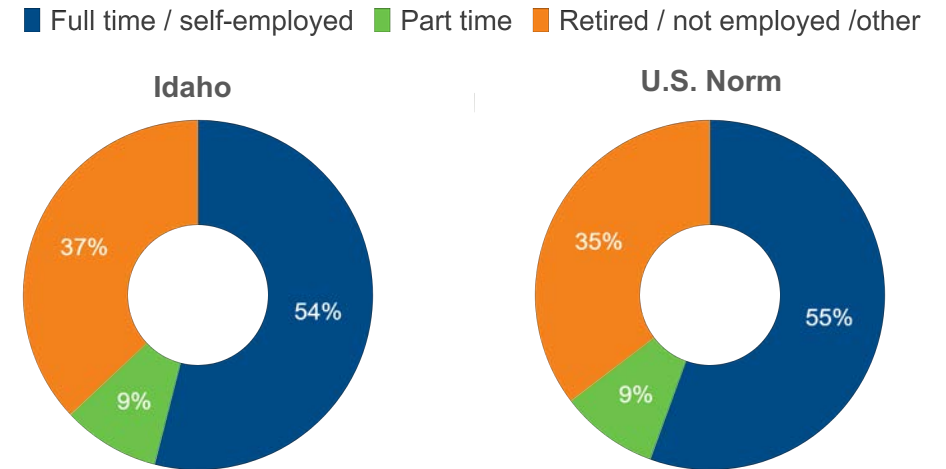
Age



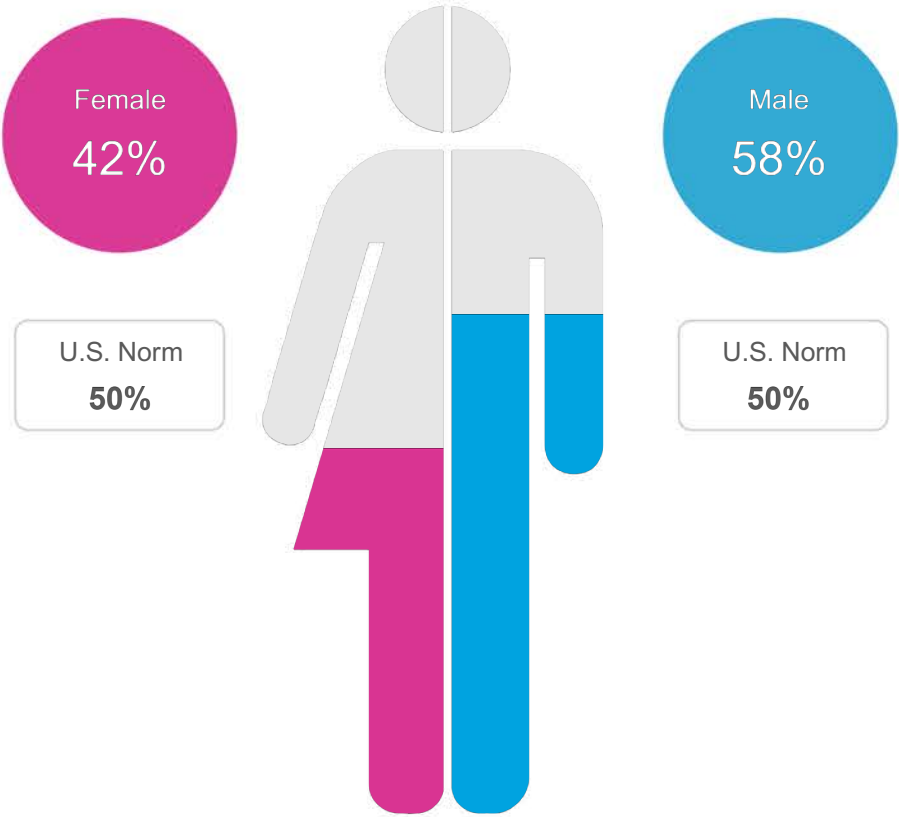
Educational Attainment



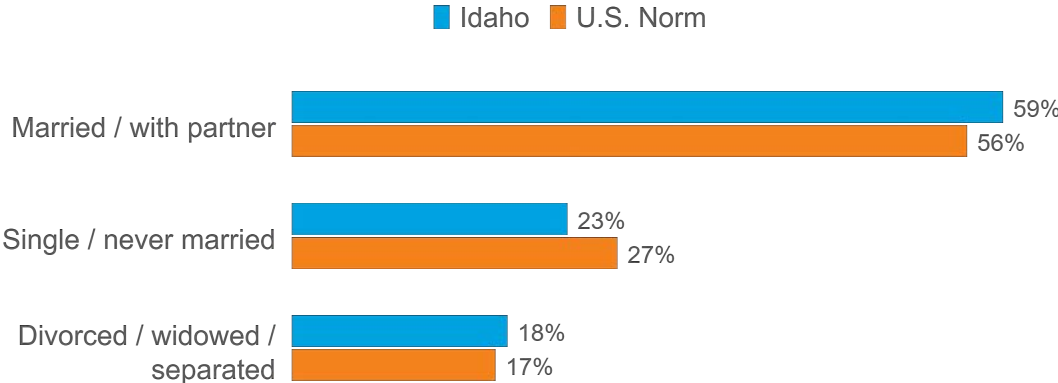
Employment



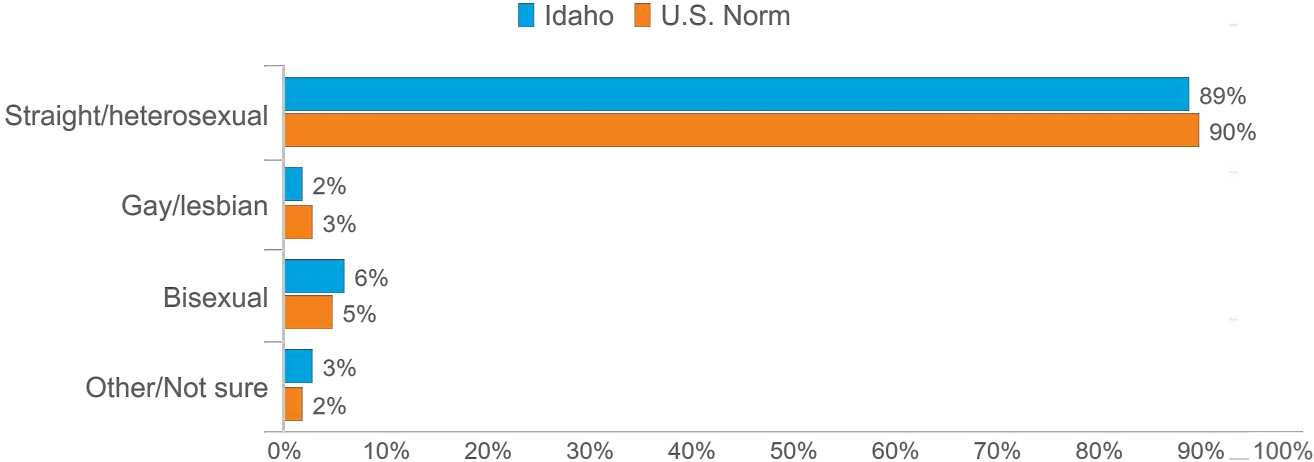
Gender



Marital Status



Sexual Orientation

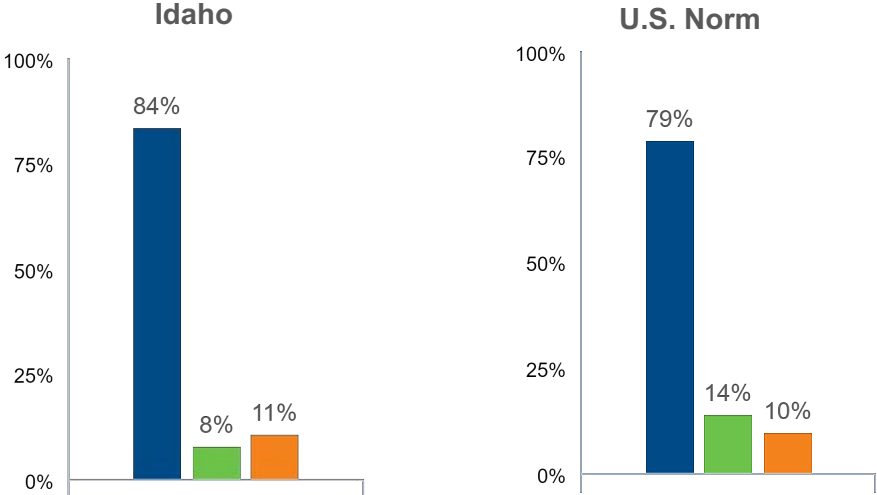


Demographic Profile of Overnight Idaho Visitors

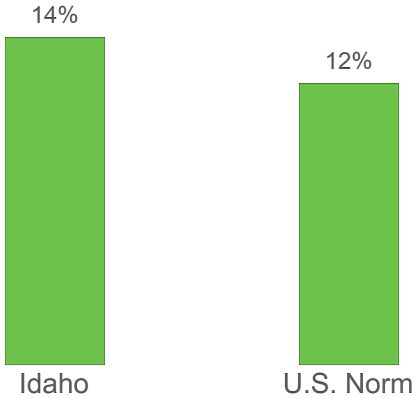
Base: 2023 Overnight Person-Trips

Race

White African-American Other

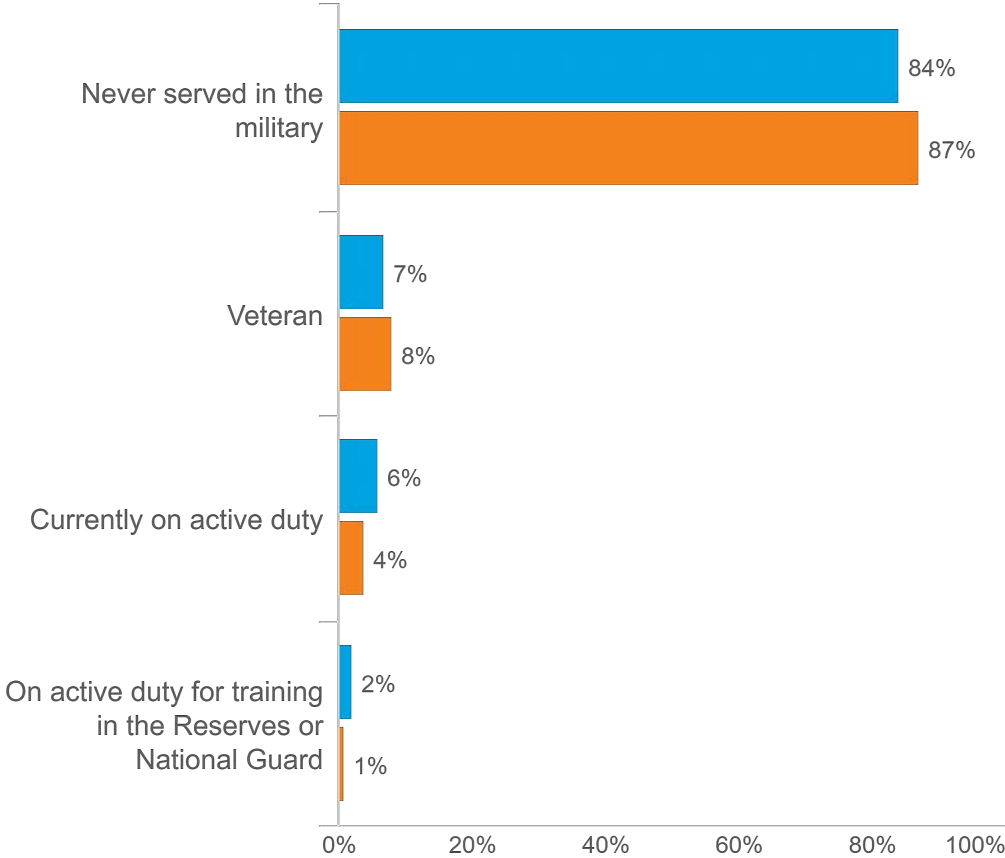


Hispanic Background

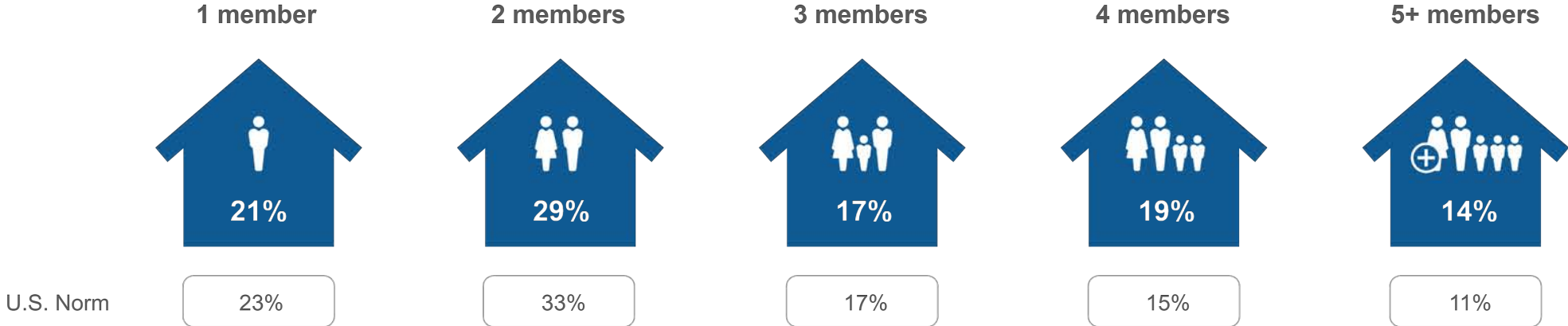


Military Status

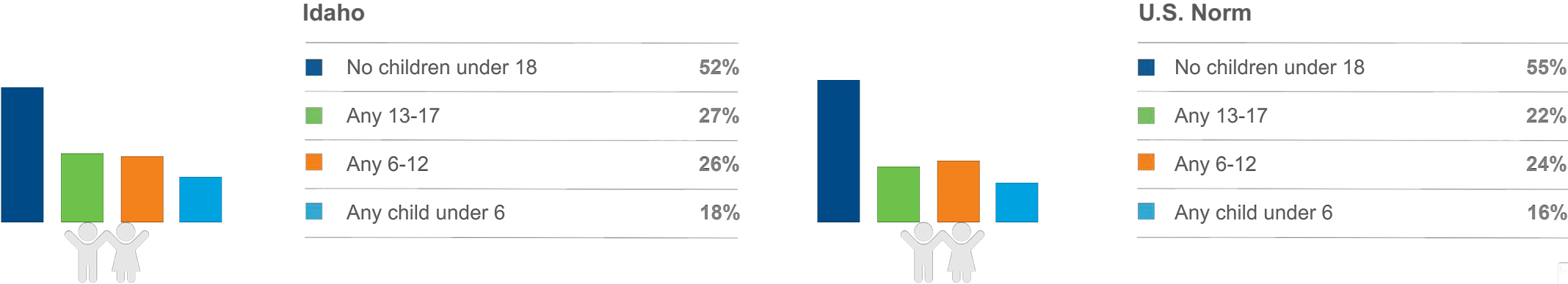
Idaho U.S. Norm



Household Size



Children in Household





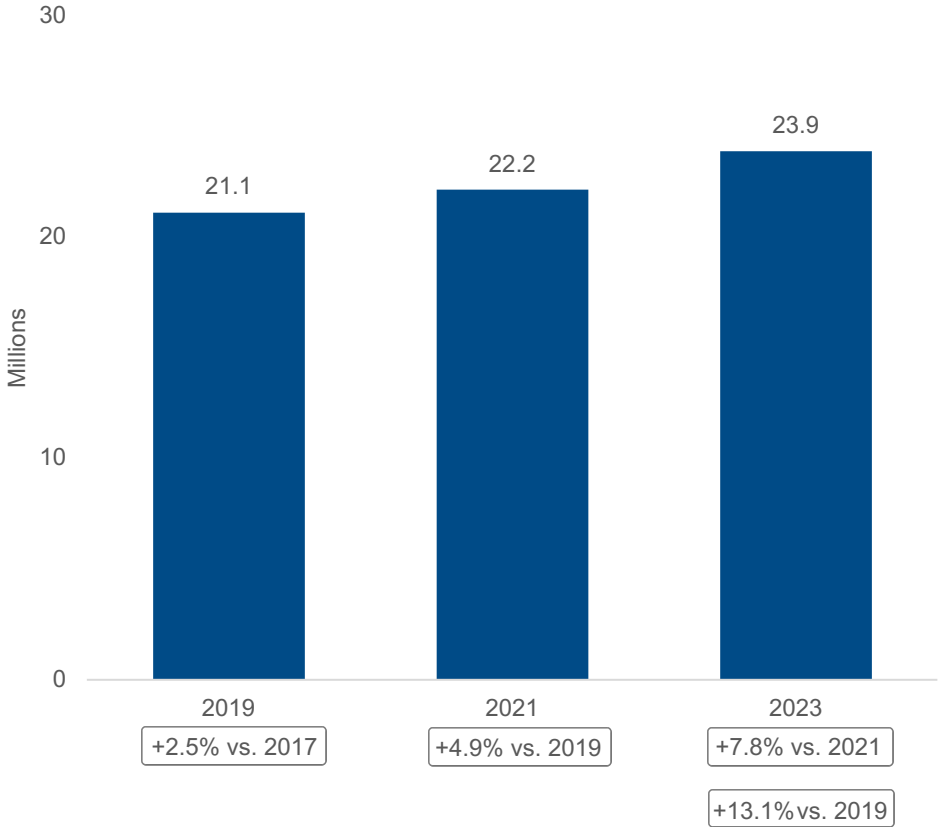
Travel USA Visitor Profile

Day Visitation



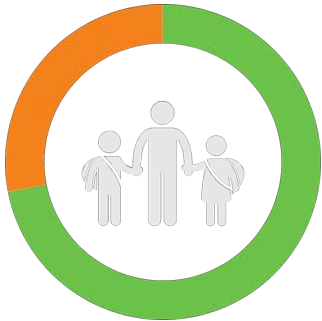
2023

Day Trips to Idaho



Size of Idaho Day Travel Market - Adults vs. Children

Total Day Person-Trips
23.9 Million



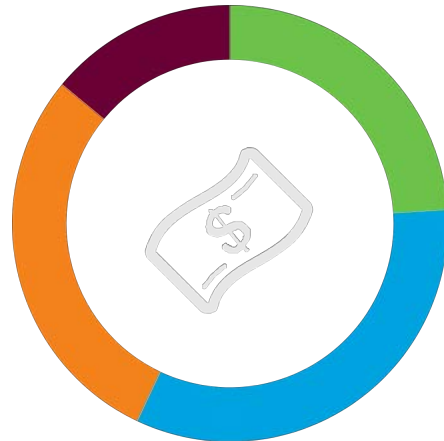
Adults	72%	17.2 Million
Children	28%	6.7 Million

Domestic Day Expenditures - by Sector

Total Spending
\$ 1.716 Billion

+24.1% vs. 2021

+32.2% vs. 2019



Sector	Percentage	Amount
Transportation at Destination	24%	\$406 Million
Restaurant Food & Beverage	33%	\$568 Million
Retail Purchase	29%	\$503 Million
Recreation/Entertainment	14%	\$240 Million

vs. 2021

+26.4%

+22.2%

+22.5%

+28.2%

vs. 2019

+51.8%

+28.0%

+21.7%

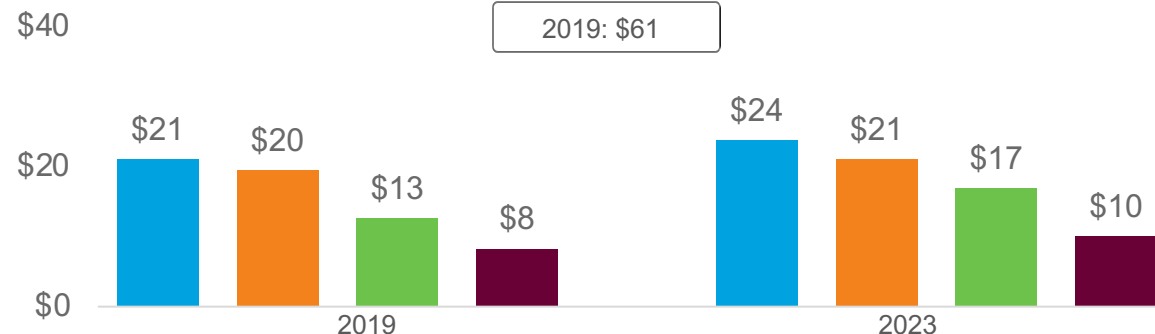
+37.8%

Average Per Person Per Trip Expenditures on Domestic Day Trips - by Sector

Average Per Person Per Trip: \$ 72












2021: \$62

2019: \$61

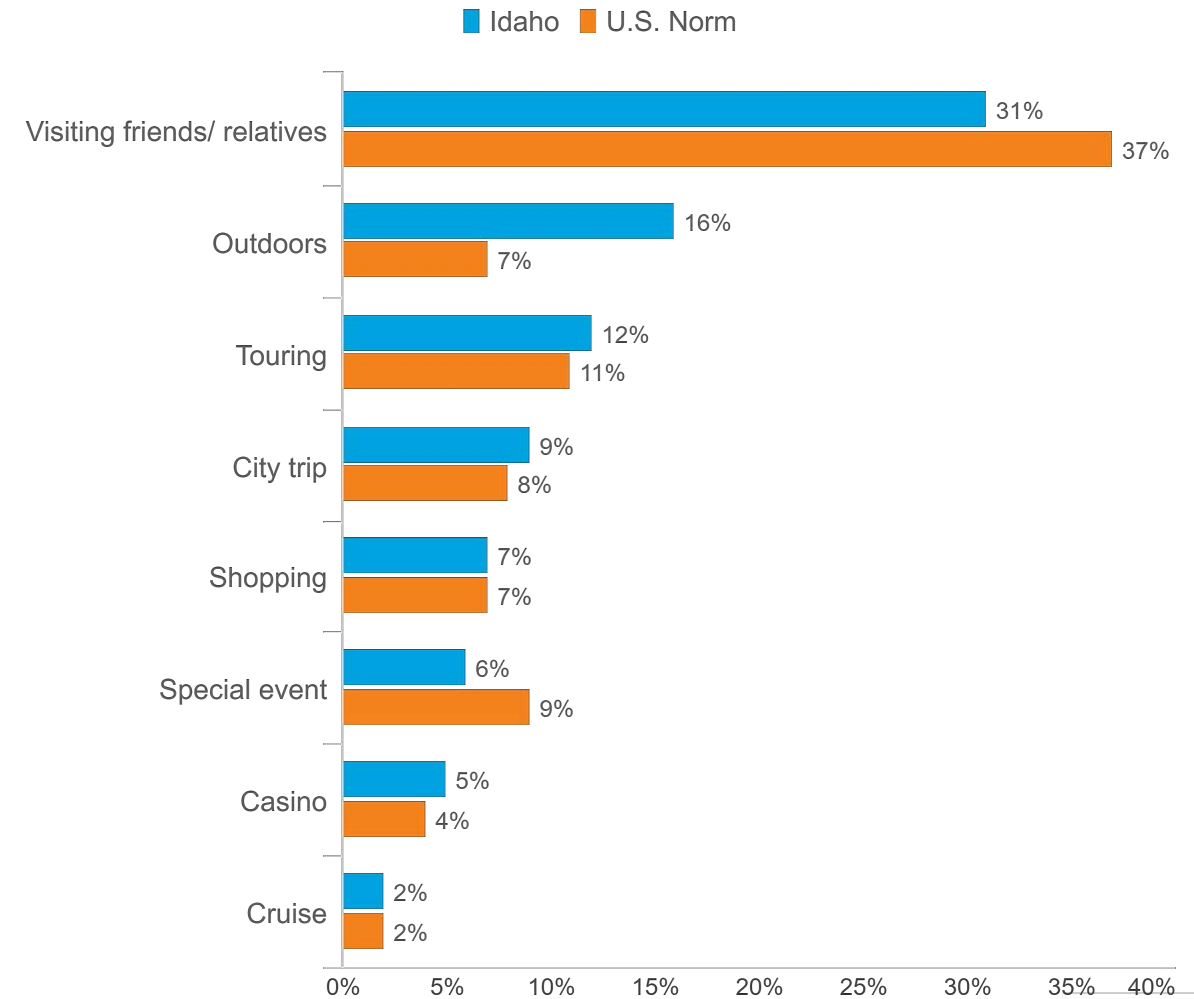


■ Restaurant food & beverage
 ■ Retail Purchase
 ■ Transportation at Destination
 ■ Recreation/ Sightseeing/ Entertainment

Main Purpose of Trip

 31% Visiting friends/ relatives	
 16% Outdoors	 <1% Conference/ Convention
 12% Touring	
 9% City trip	 4% Other business trip
 7% Shopping	
 6% Special event	
 5% Casino	 3% Business-Leisure
 2% Cruise	

Main Purpose of Leisure Trip



2023 U.S. Day Trips

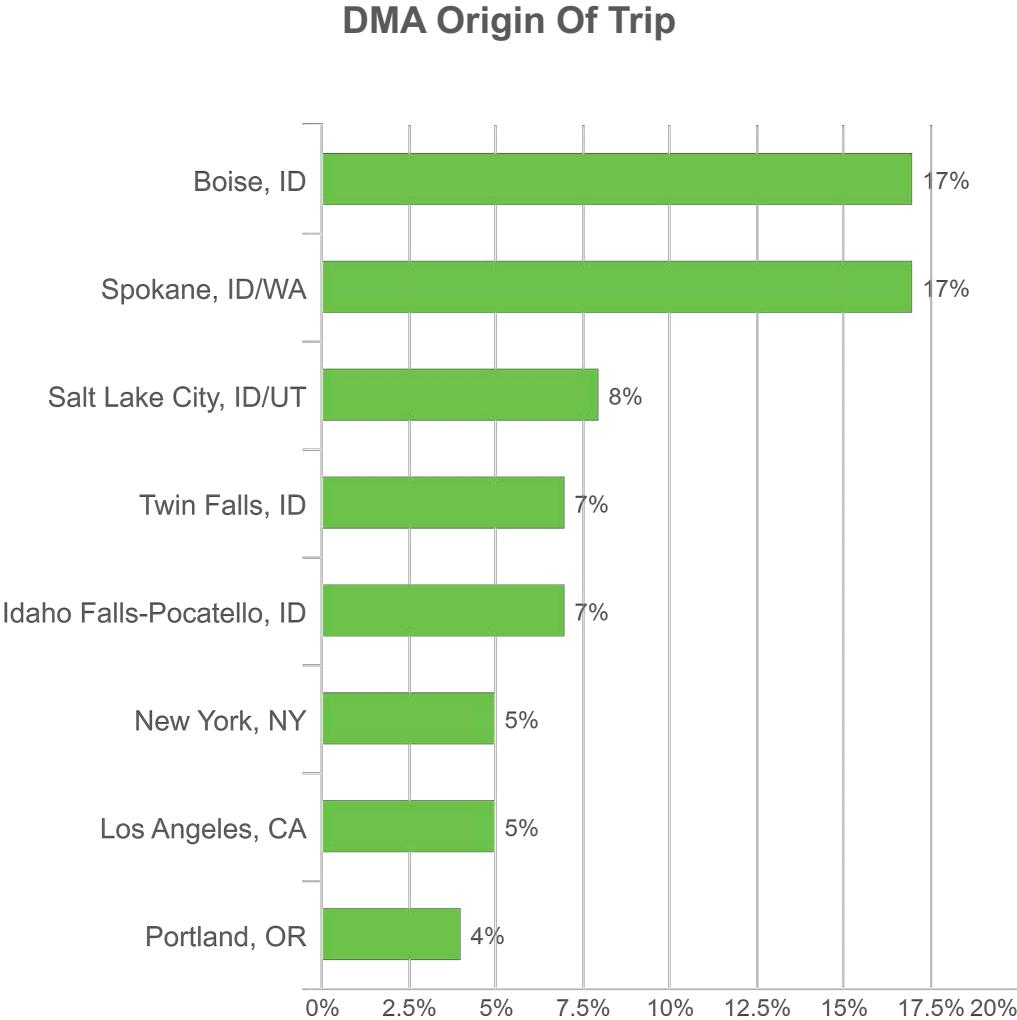
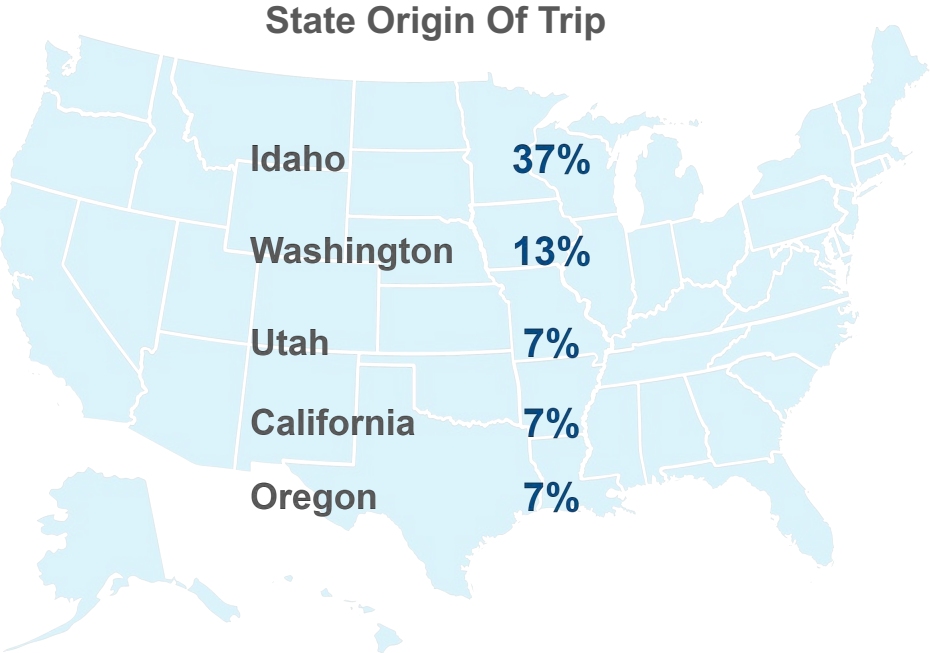


■ Visiting friends/relatives	37%
■ Marketable	54%
■ Business	6%
■ Business-leisure	3%

2023 Idaho Day Trips



■ Visiting friends/relatives	31%
■ Marketable	62%
■ Business	4%
■ Business-leisure	3%



Season of Trip

Total Day Person-Trips

Size of Travel Party

■ Adults ■ Children

Idaho



Total **2.6**

Average number of people

U.S. Norm



Total **2.6**

Average number of people



23% of travel parties had a travel party member that required accessibility services

U.S. Norm: **15%**

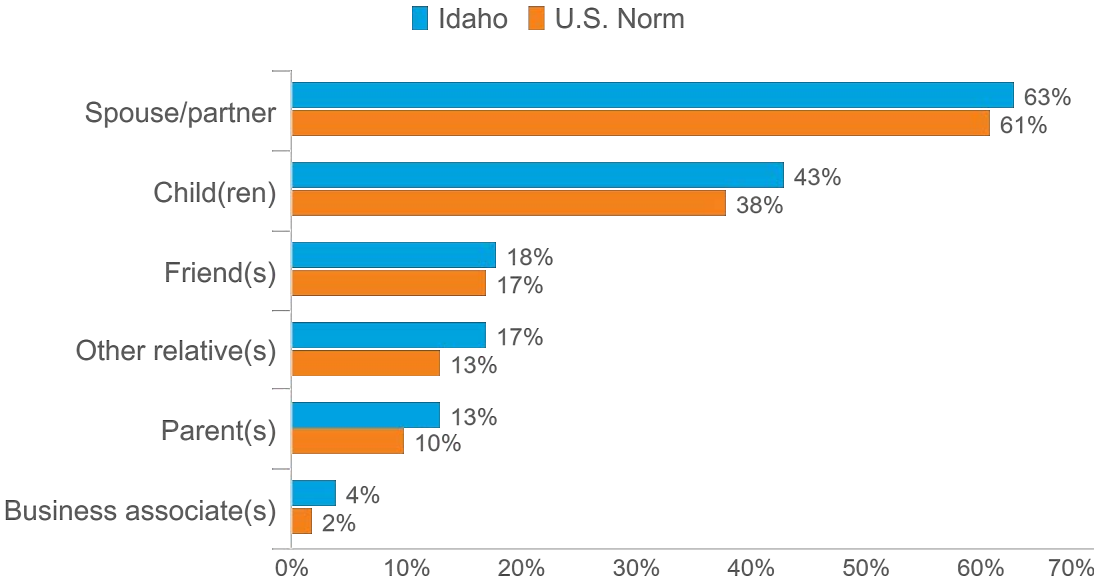


22% of trips only had one person in the travel party

U.S. Norm: **25%**

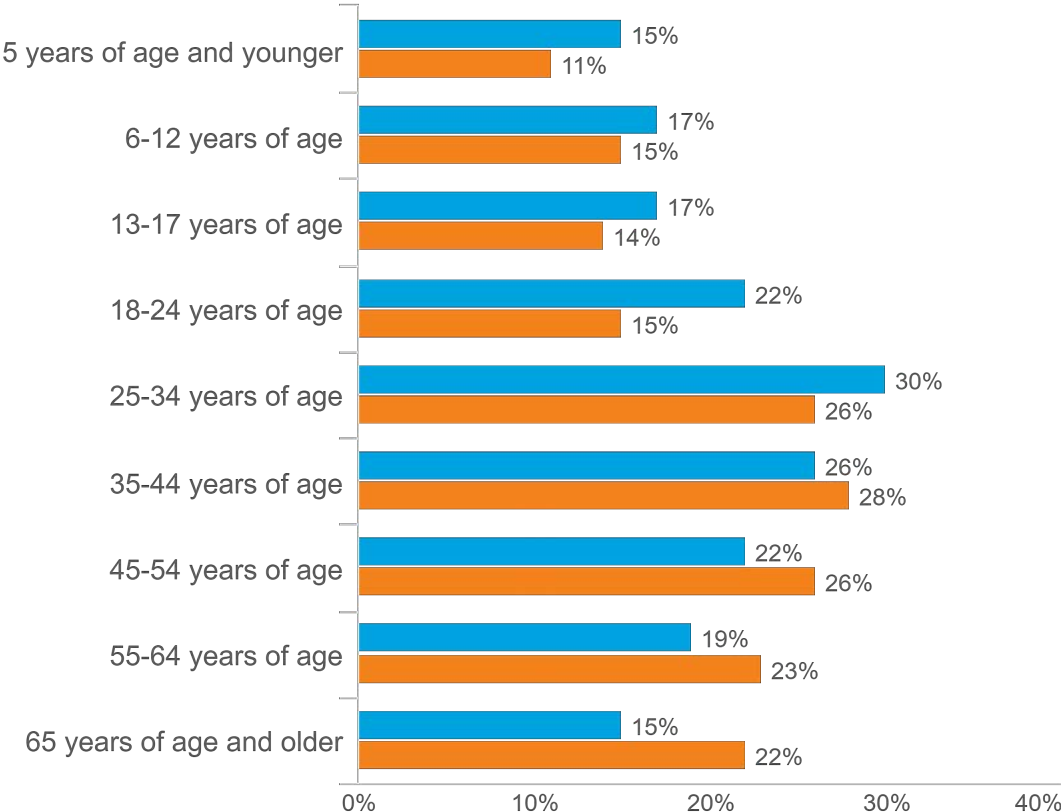
Composition of Immediate Travel Party

Base: 2023 Day Person-Trips that included more than one person



Travel Party Age

Idaho U.S. Norm



Activity Groupings

Outdoor Activities



U.S. Norm: 32%

Entertainment Activities



U.S. Norm: 40%

Cultural Activities



U.S. Norm: 20%

Sporting Activities



U.S. Norm: 14%

Business Activities









U.S. Norm: 10%

Activities and Experiences (Top 10)







	Idaho	U.S. Norm
Shopping	22%	21%
Sightseeing	15%	14%
Attending celebration	15%	11%
Landmark/historic site	12%	8%
Hiking/backpacking	11%	6%
Local parks/playgrounds	10%	6%
Fishing	9%	4%
Swimming	9%	6%
Nature tours/wildlife viewing/birding	9%	5%
Convention for personal interest	8%	3%

Shopping Types on Trip

Base: 2023 Day Person-Trips that included Shopping

	Idaho	U.S. Norm
 Shopping at locally owned businesses	47%	42%
 Outlet/mall shopping	46%	45%
 Convenience/grocery shopping	40%	26%
 Big box stores (Walmart, Costco)	28%	26%
 Farmers market	21%	13%
 Antiquing	21%	12%
 Souvenir shopping	20%	23%

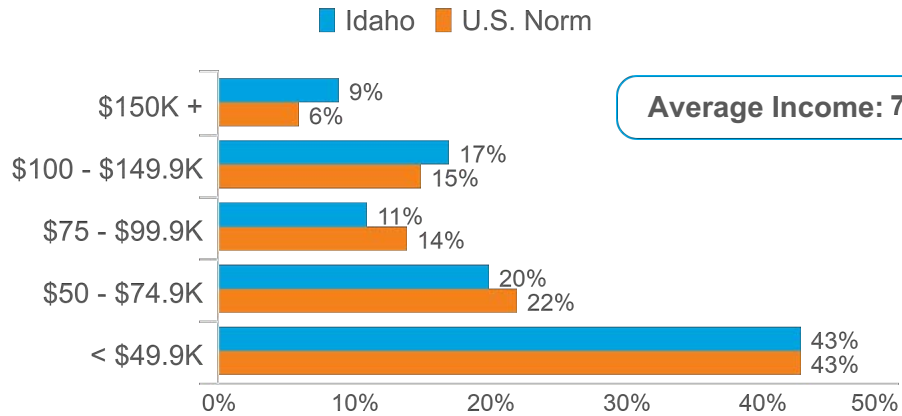
Dining Types on Trip

	Idaho	U.S. Norm
 Fast food	42%	39%
 Casual dining	39%	43%
 Unique/local food	20%	20%
 Carry-out/food delivery service	17%	12%
 Picnicking	16%	9%
 Fine/upscale dining	13%	10%

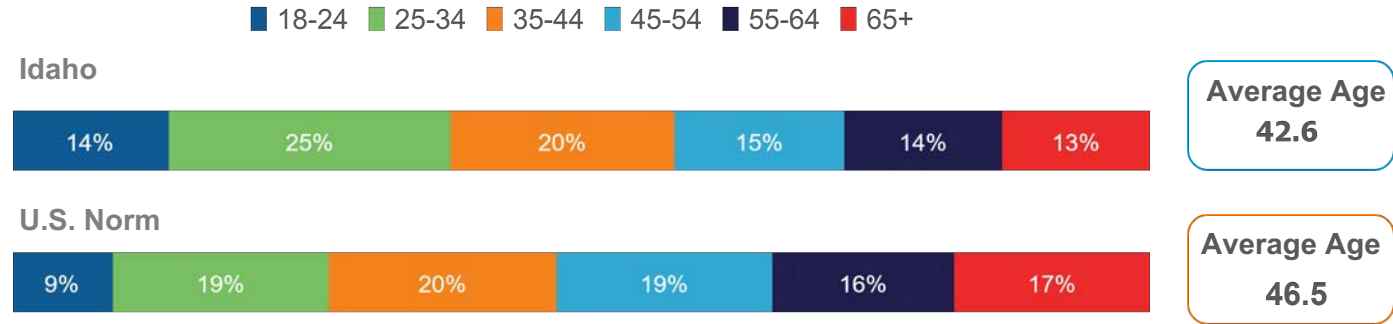
Demographic Profile of Day Idaho Visitors

Base: 2023 Day Person-Trips

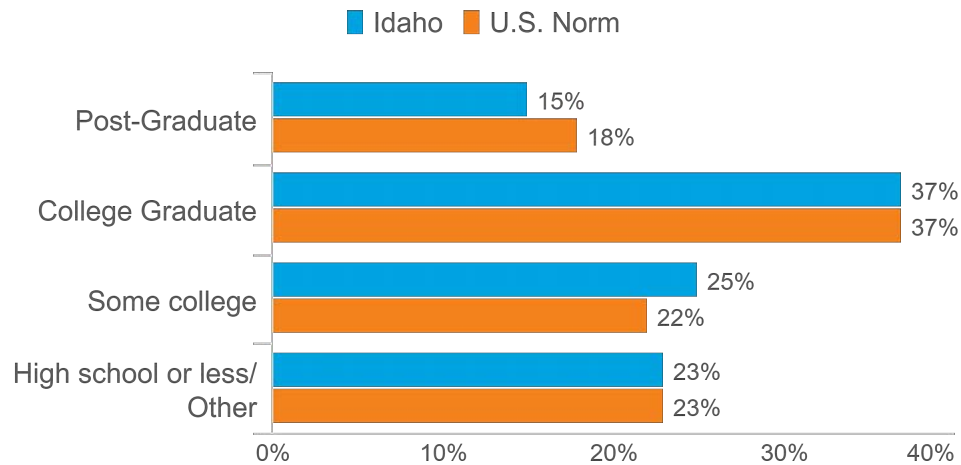
Household Income



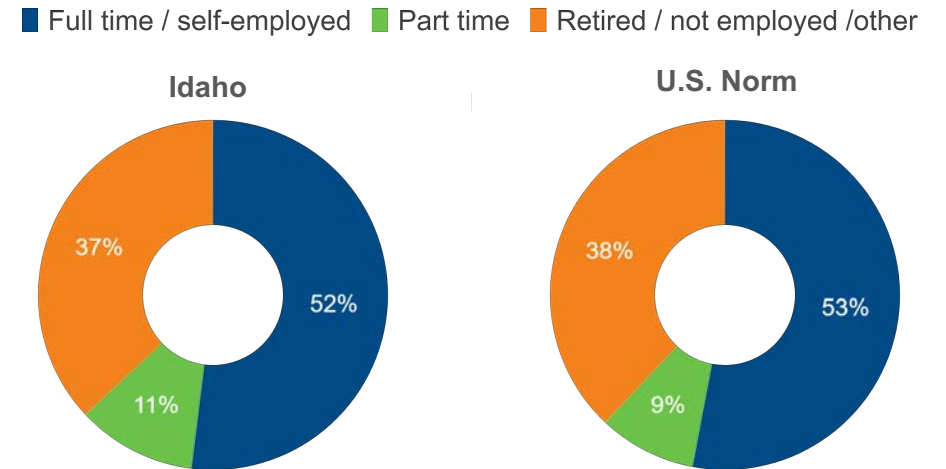
Age



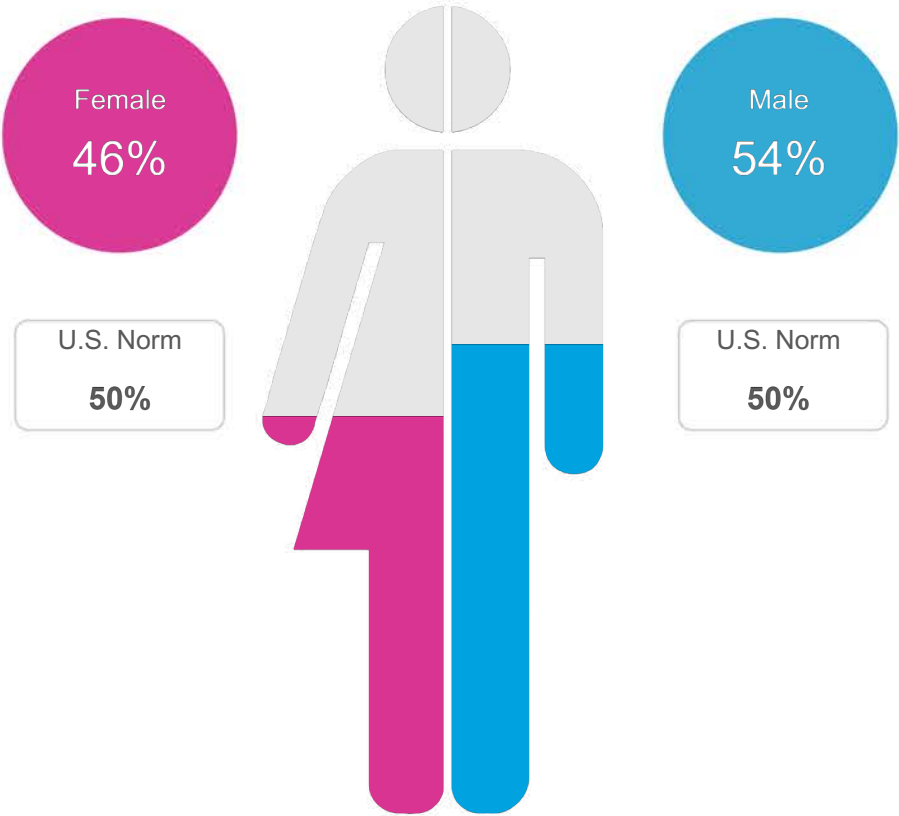
Educational Attainment



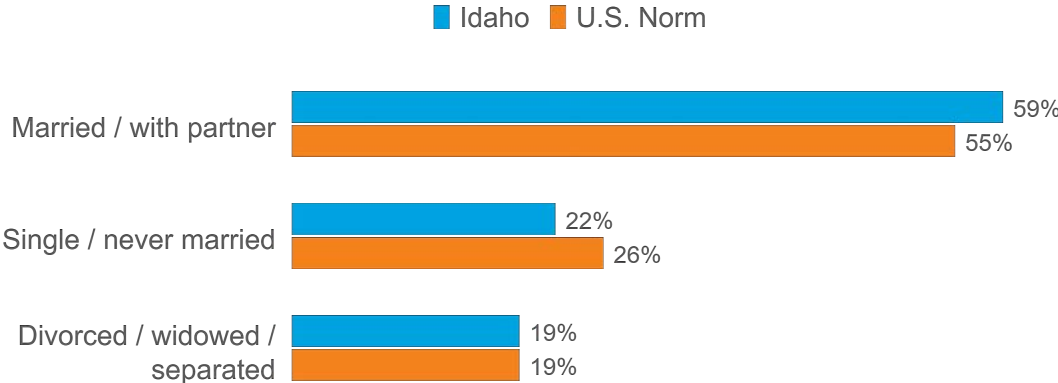
Employment



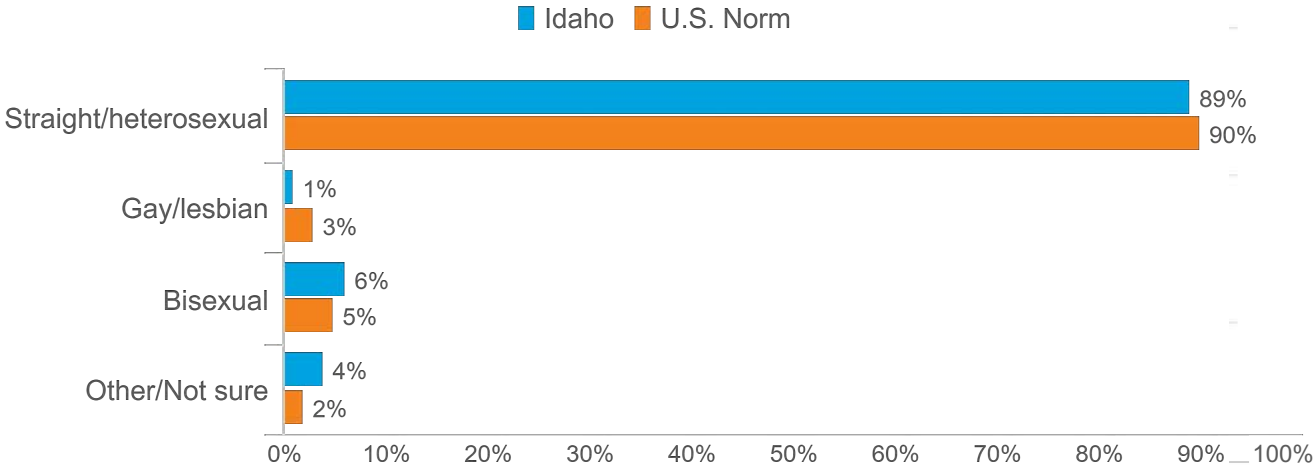
Gender



Marital Status



Sexual Orientation

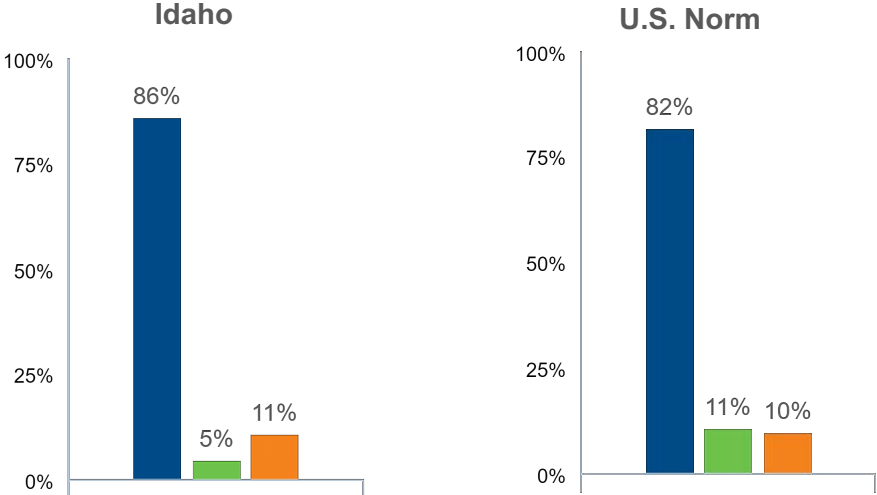


Demographic Profile of Day Idaho Visitors

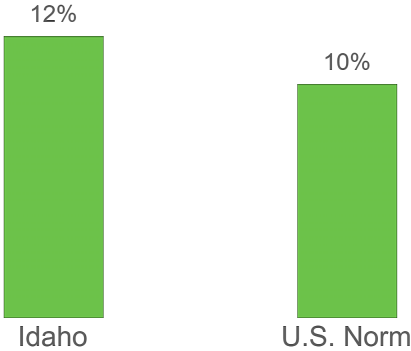
Base: 2023 Day Person-Trips

Race

White African-American Other

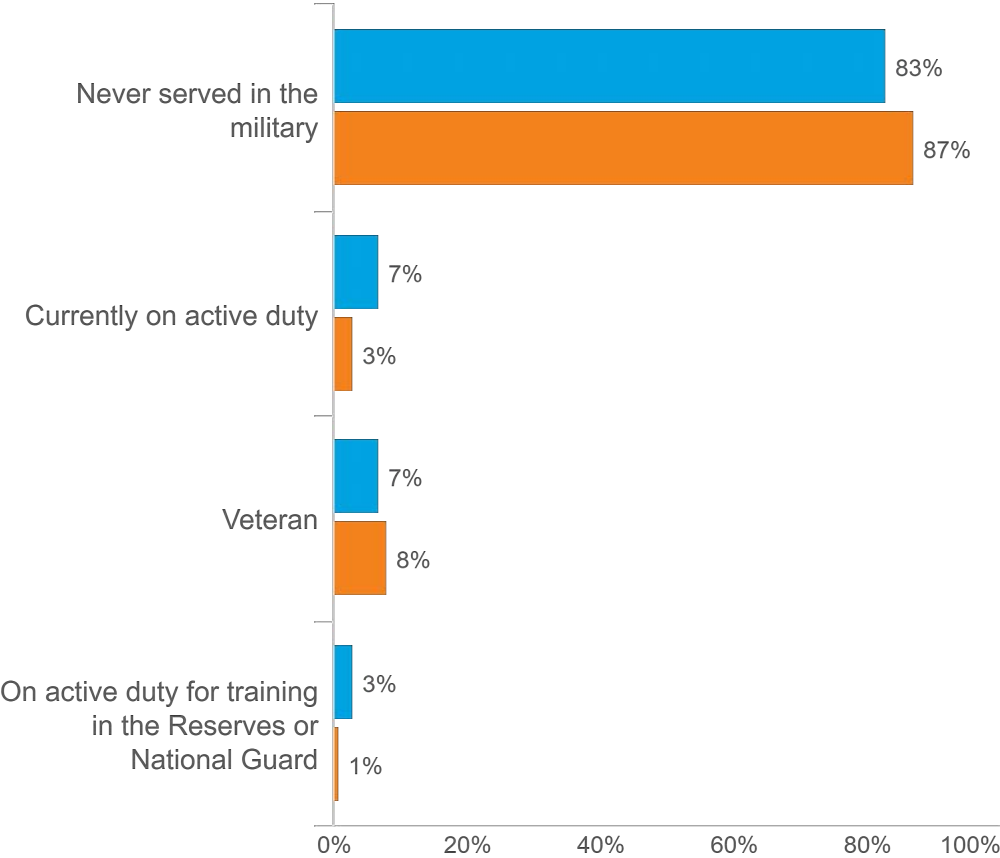


Hispanic Background

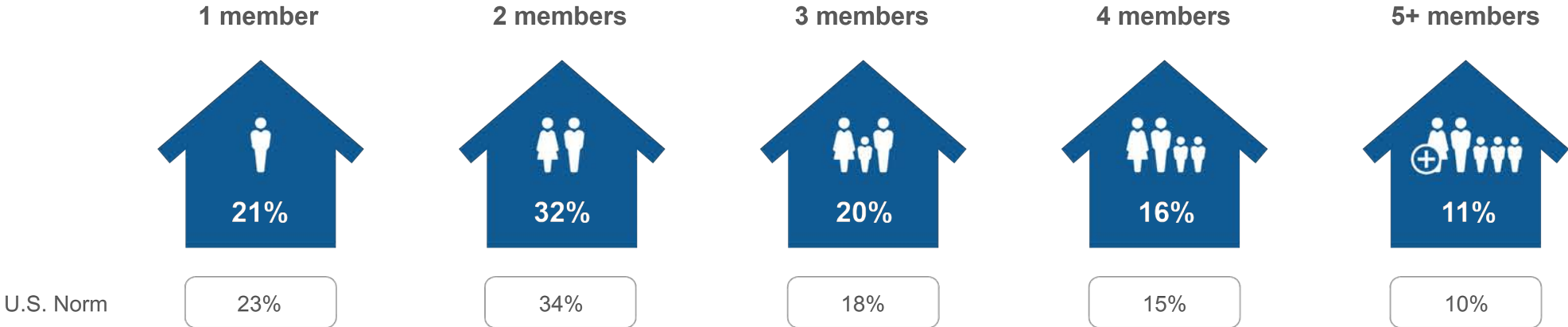


Military Status

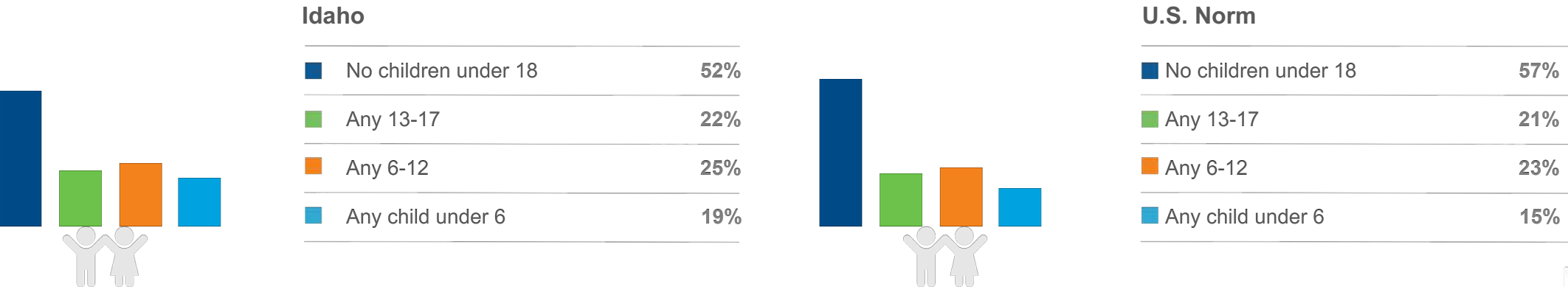
Idaho U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Regions Maps & Visitor Volumes



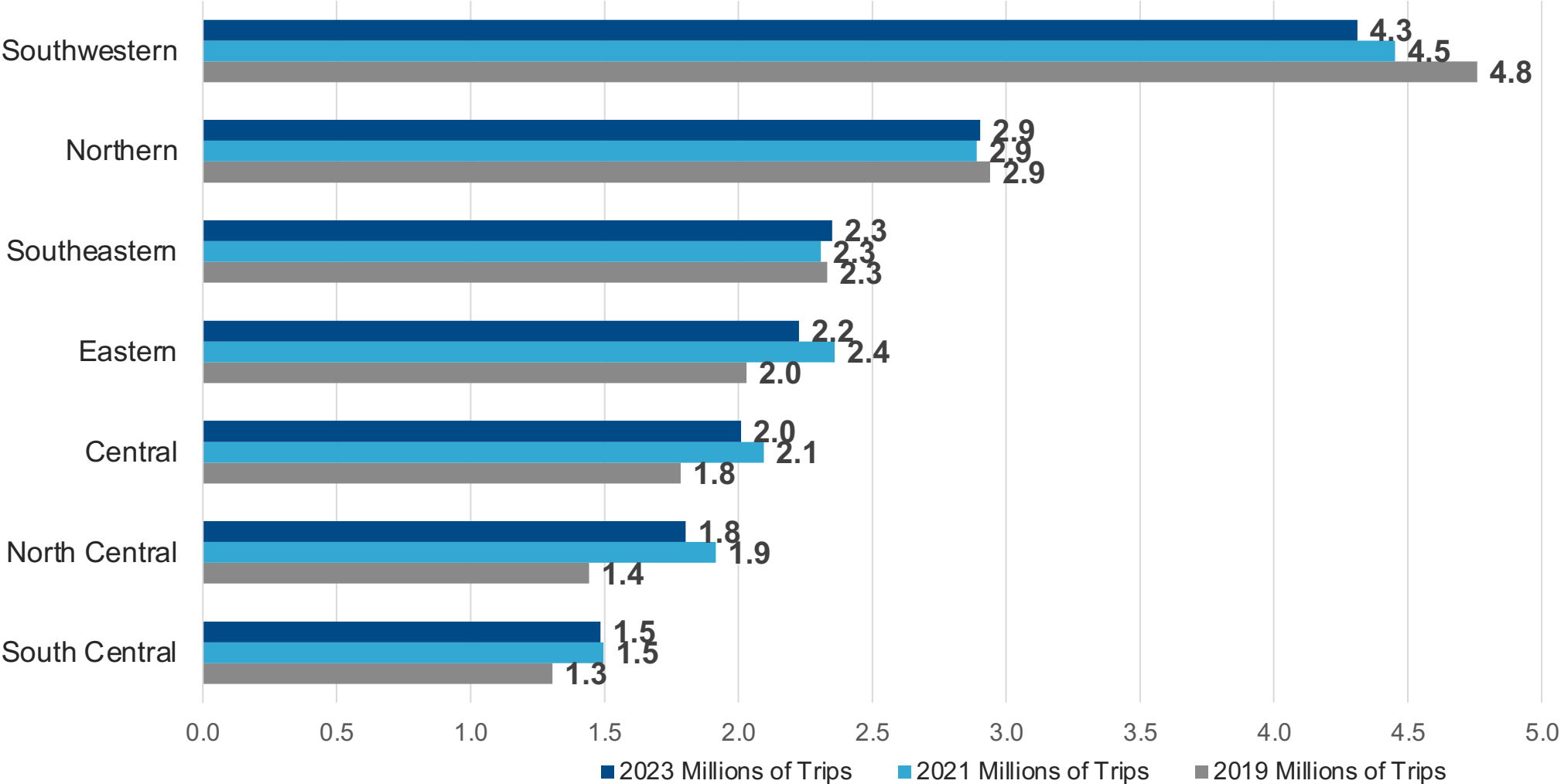
2023

Idaho Regions Map



Overnight Visitor Volume by Region*

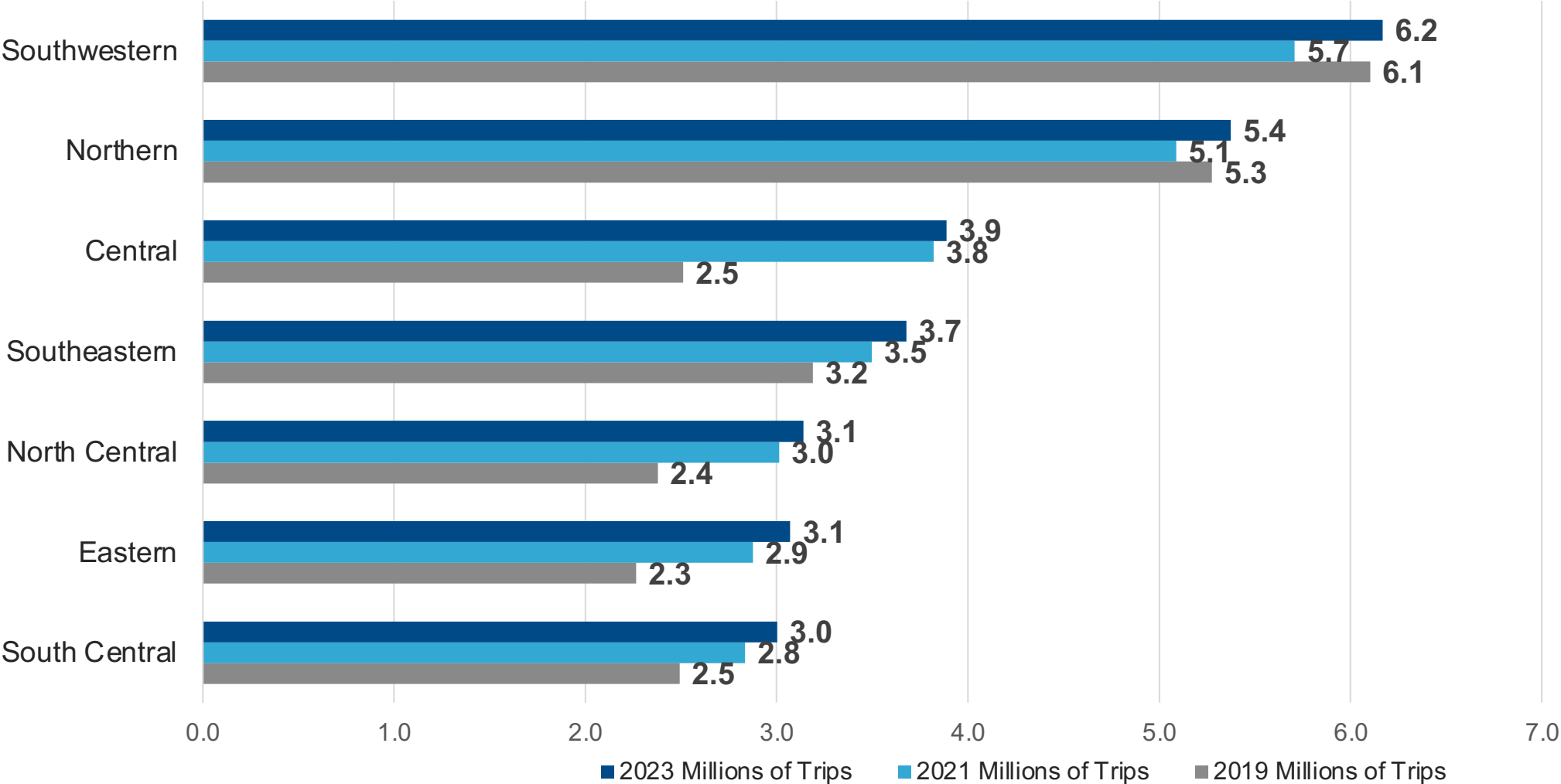
Base: Overnight Person-Trips to Idaho



*Adds to more than total state visitor volume because people may visit more than one region during their trip

Day Visitor Volume by Region*

Base: Day Person-Trips to Idaho



*Adds to more than total state visitor volume because people may visit more than one region during their trip



Travel USA Visitor Profile

Overnight Visitation: Northern Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Northern, the following sample was achieved in 2022/2023:



Overnight Base Size

380

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

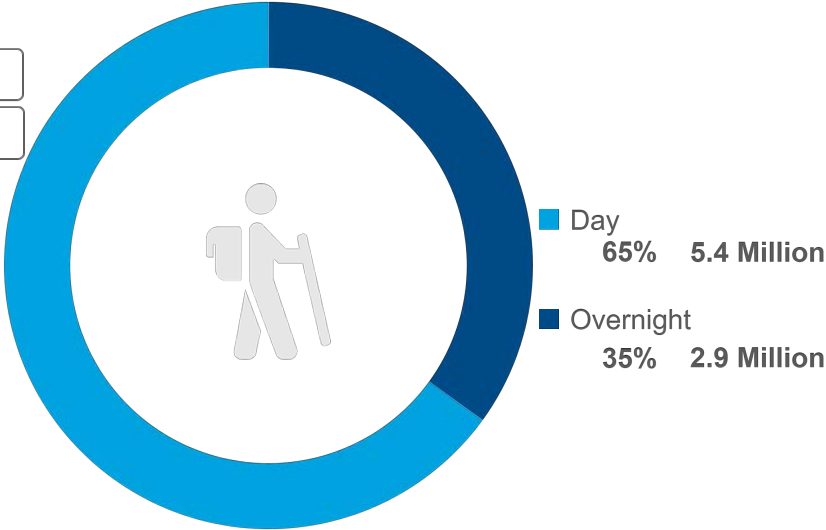
Total Size of Northern 2023 Domestic Travel Market

Total Person-Trips

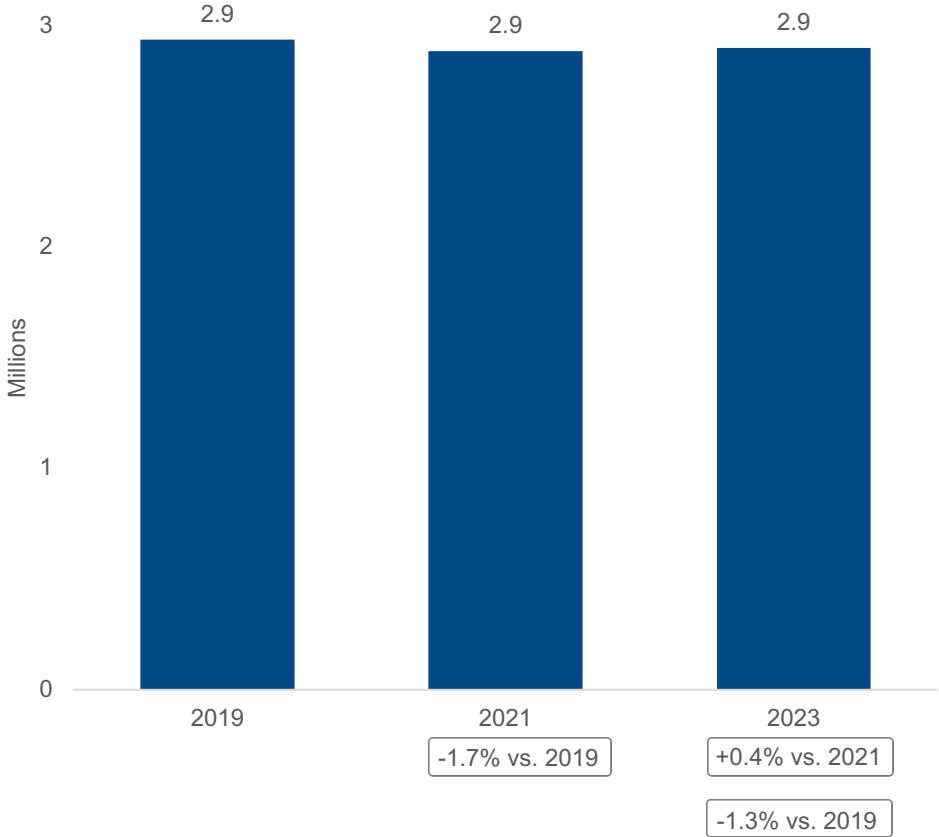
8.3 Million

+3.7% vs. 2021

+0.7% vs. 2019



Overnight Trips to Northern



Past Visitation to Northern

Base: 2022/2023 Overnight Person-Trips

81% of overnight travelers to Northern are repeat visitors

57% of overnight travelers to Northern had visited before in the past 12 months

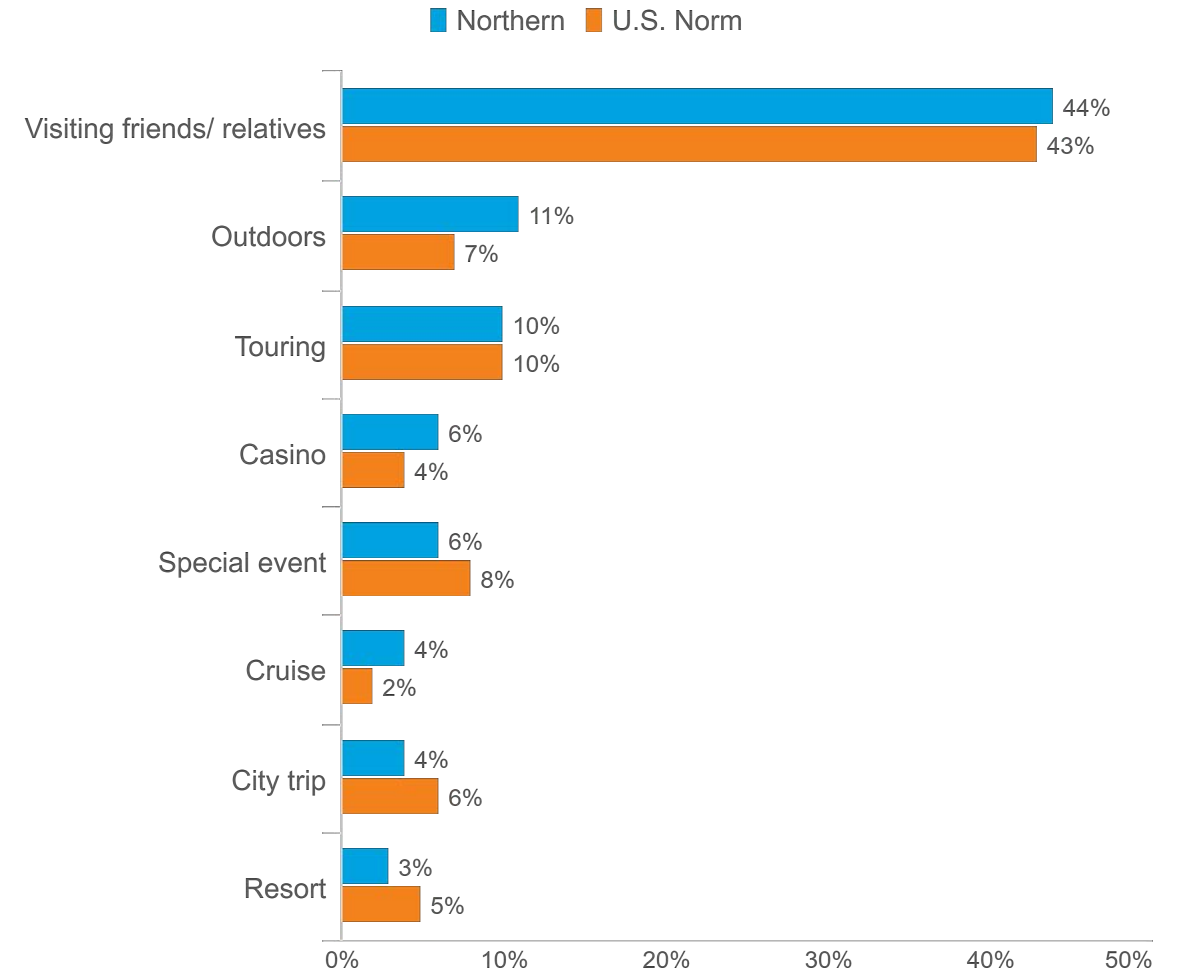
Northern's Overnight Trip Characteristics

Base: 2022/2023 Overnight Person-Trips

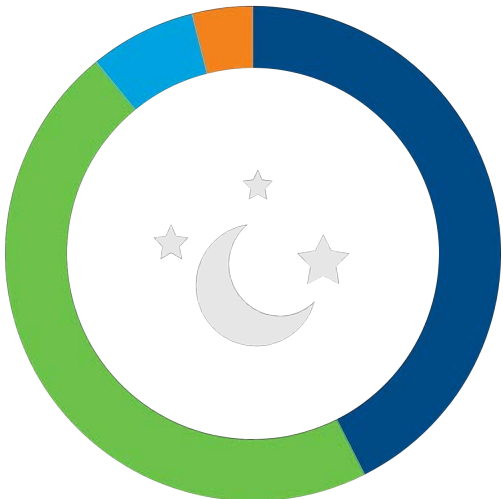
Main Purpose of Trip

 44% Visiting friends/ relatives	
 11% Outdoors	 1% Conference/ Convention
 10% Touring	
 6% Casino	 3% Other business trip
 6% Special event	
 4% Cruise	
 4% City trip	 4% Business-Leisure
 3% Resort	

Main Purpose of Leisure Trip

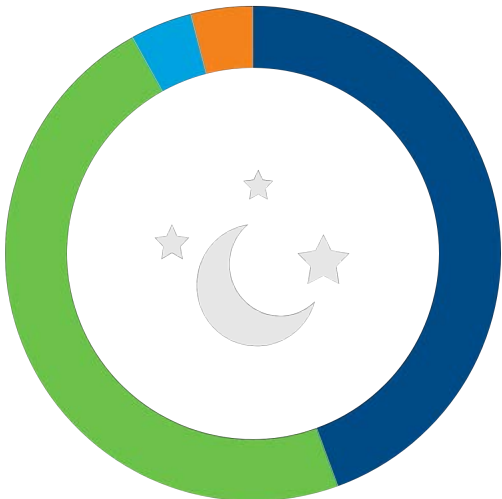


2023 U.S. Overnight Trips



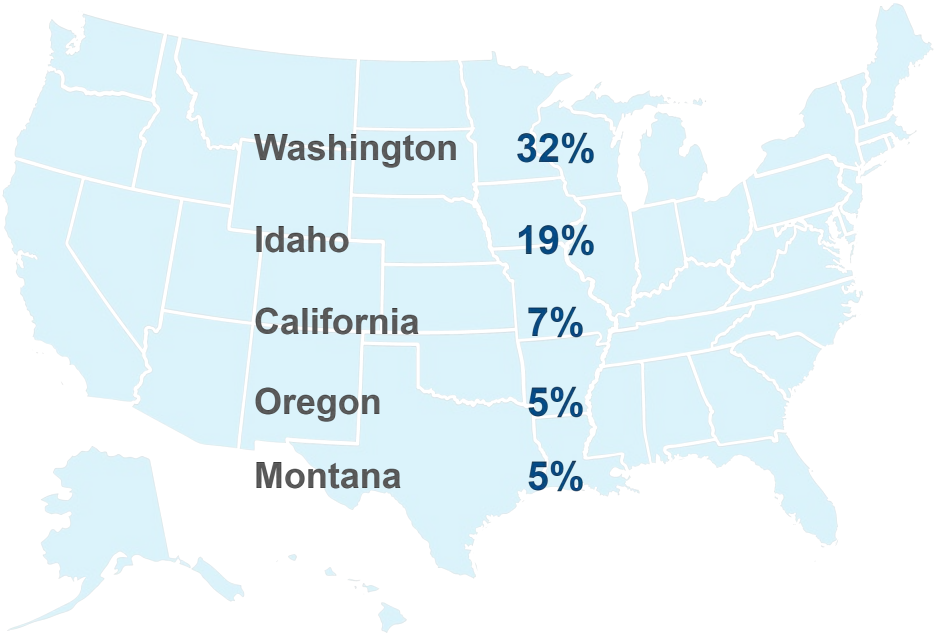
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

Northern Overnight Trips

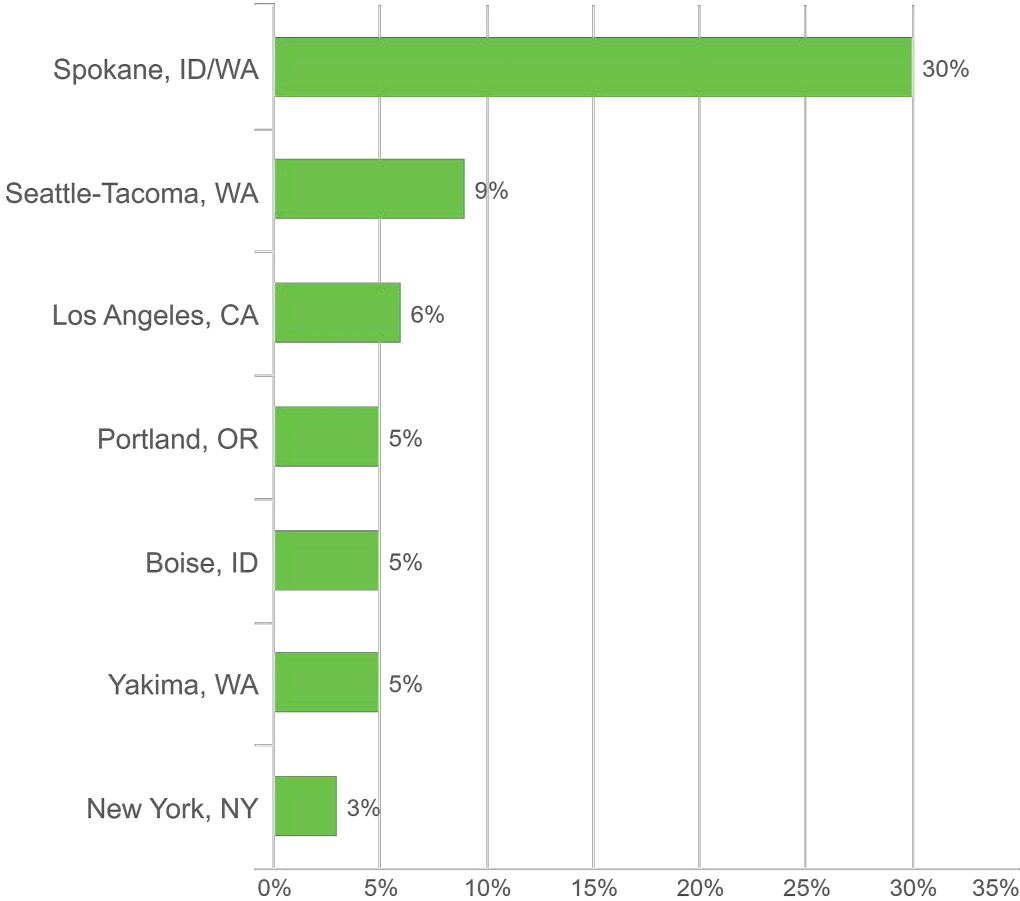


■ Visiting friends/relatives	44%
■ Marketable	47%
■ Business	4%
■ Business-leisure	4%

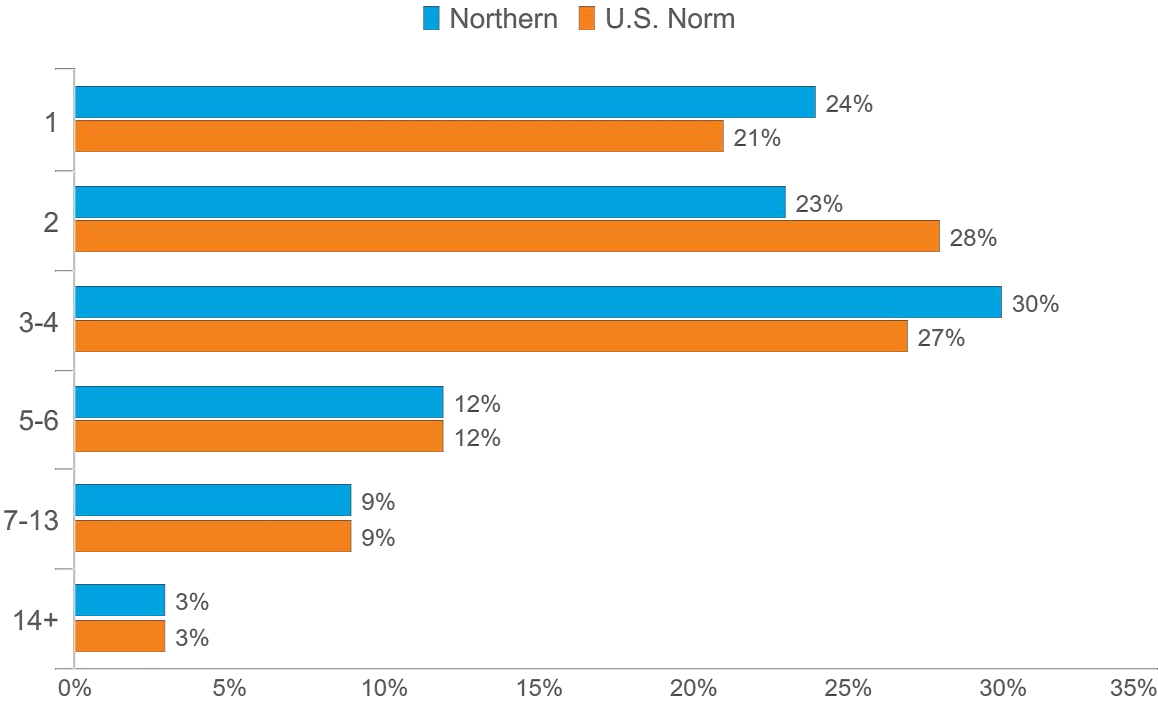
State Origin Of Trip



DMA Origin Of Trip



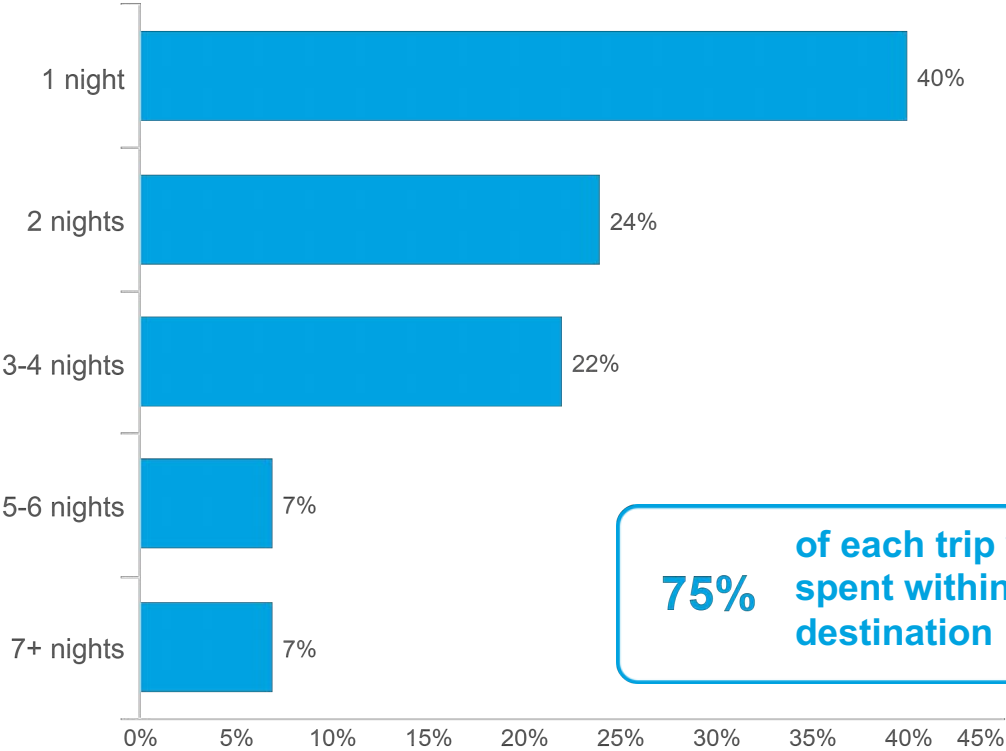
Total Nights Away on Trip



Northern
3.5
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Northern



75% of each trip was spent within the destination

Average number of nights
2.6

Size of Travel Party

■ Adults ■ Children

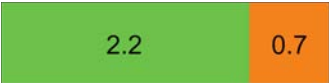
Northern



Average number of people

Total
3.0

U.S. Norm



Average number of people

Total
2.9

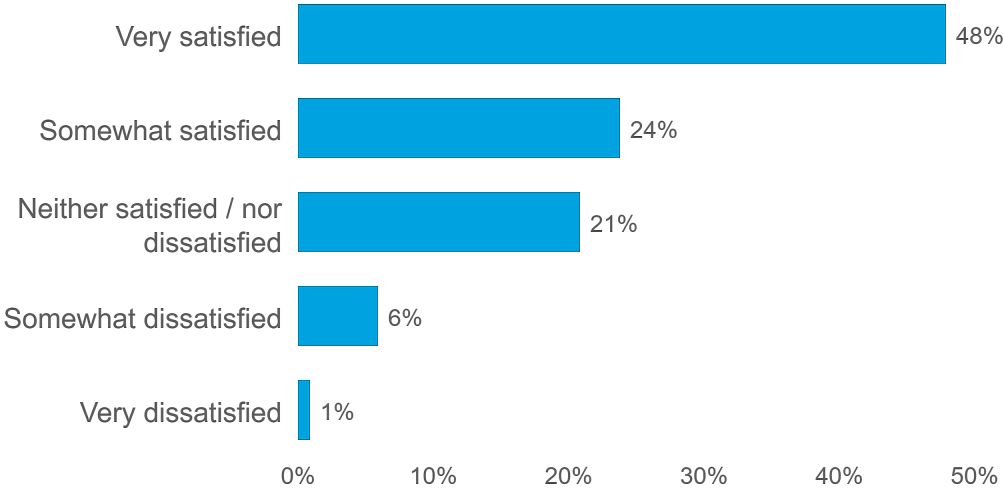


24% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



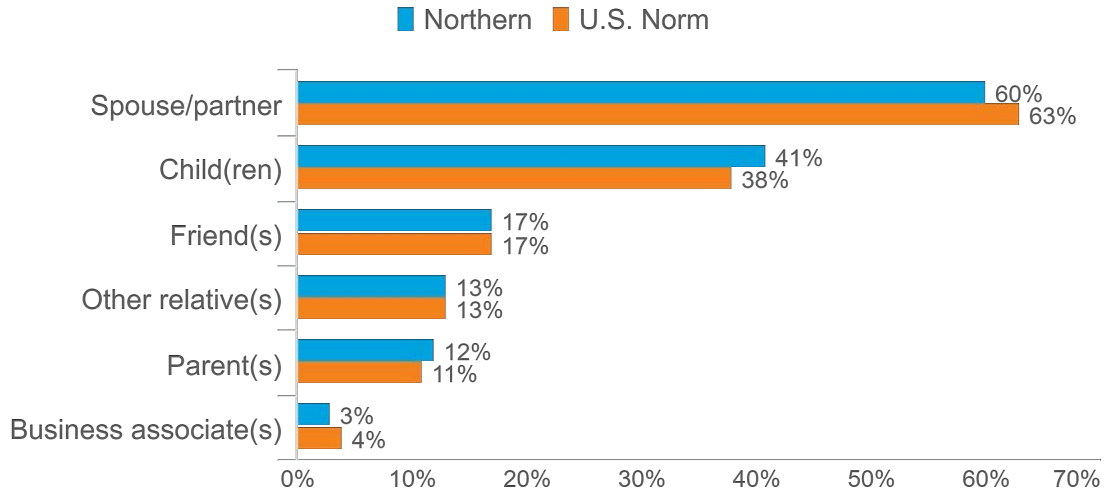


29% of trips only had one person in the travel party

U.S. Norm: 24%

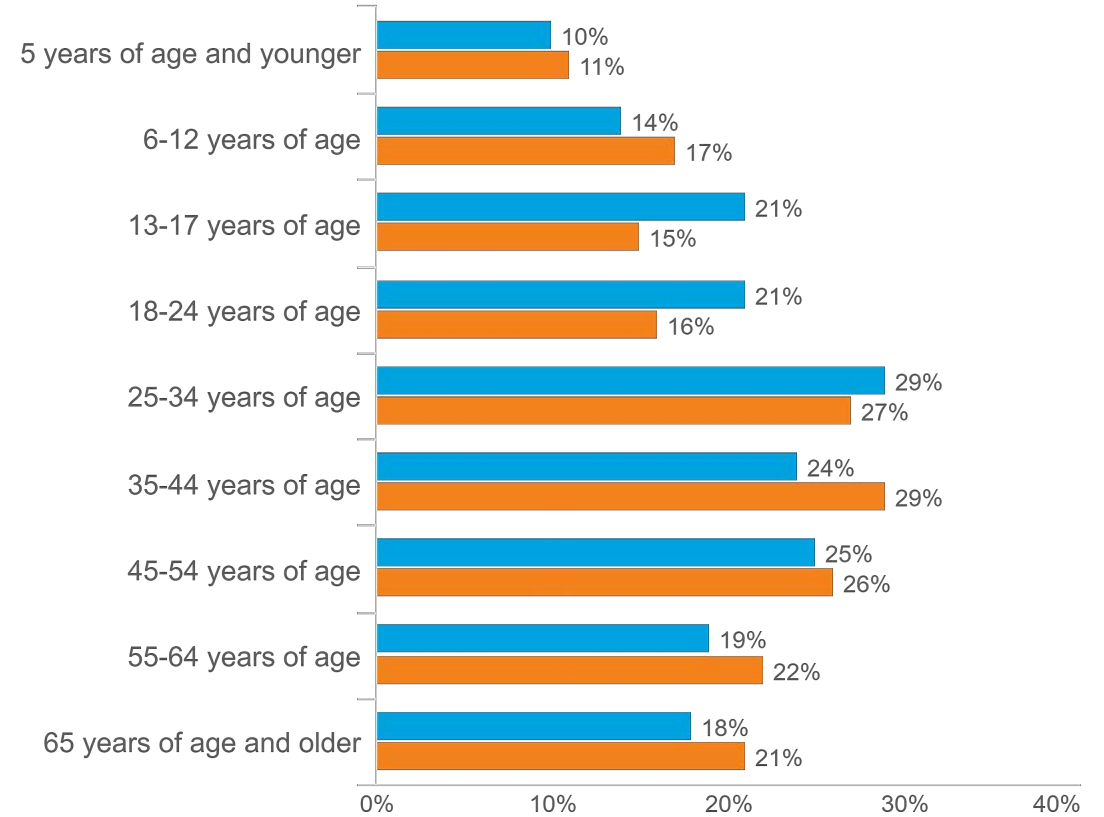
Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



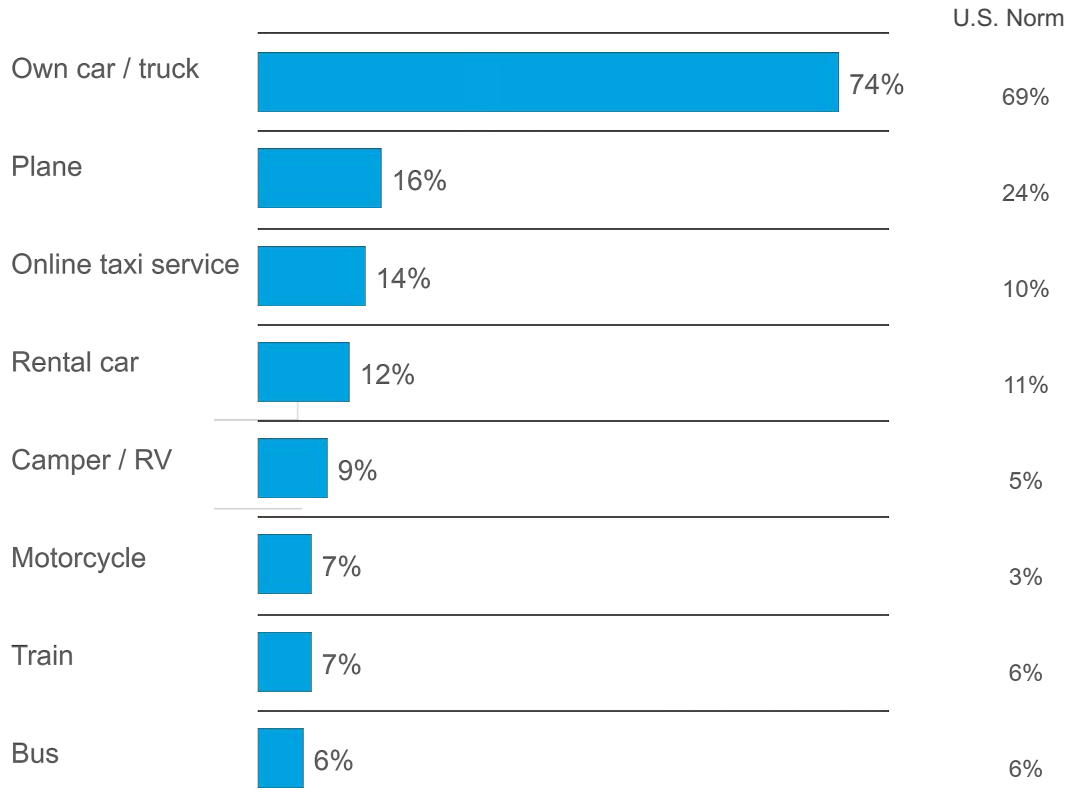
Travel Party Age

■ Northern ■ U.S. Norm

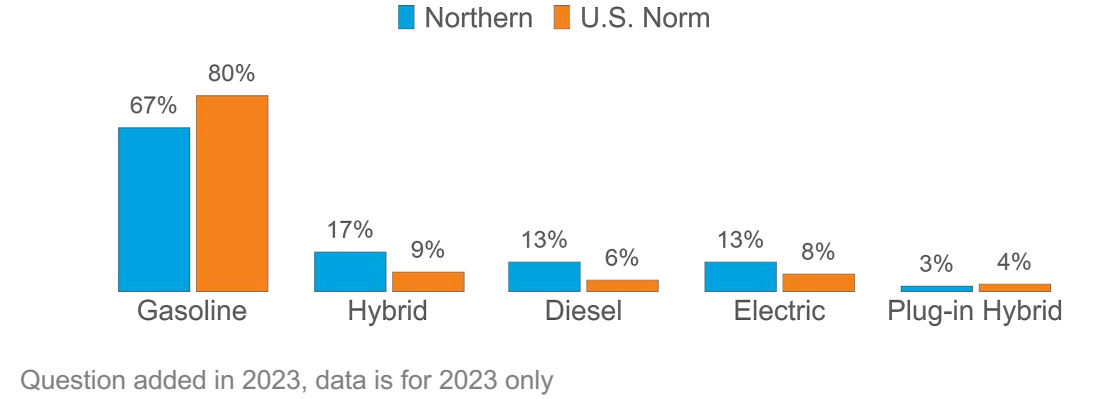


Question added in 2023, data is for 2023 only

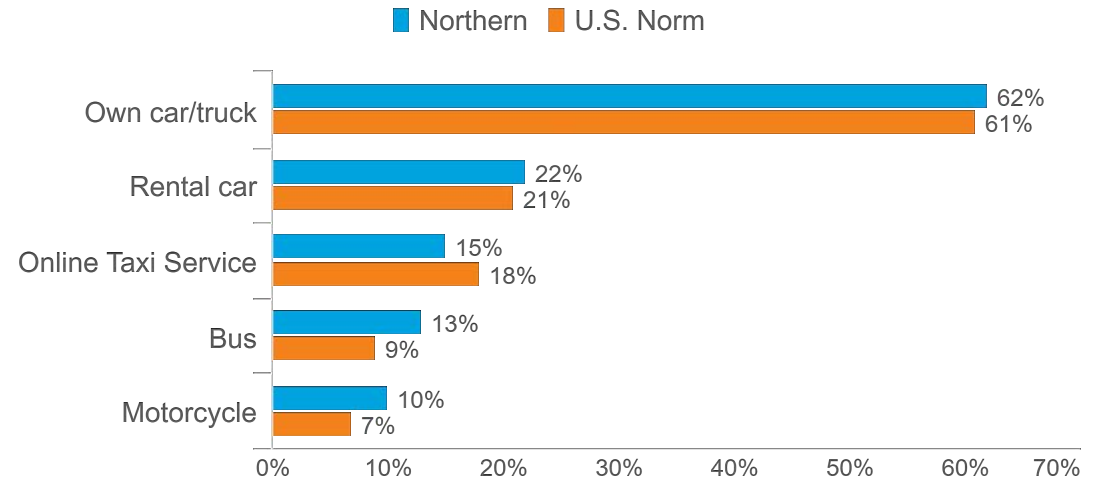
Transportation Used to get to Destination



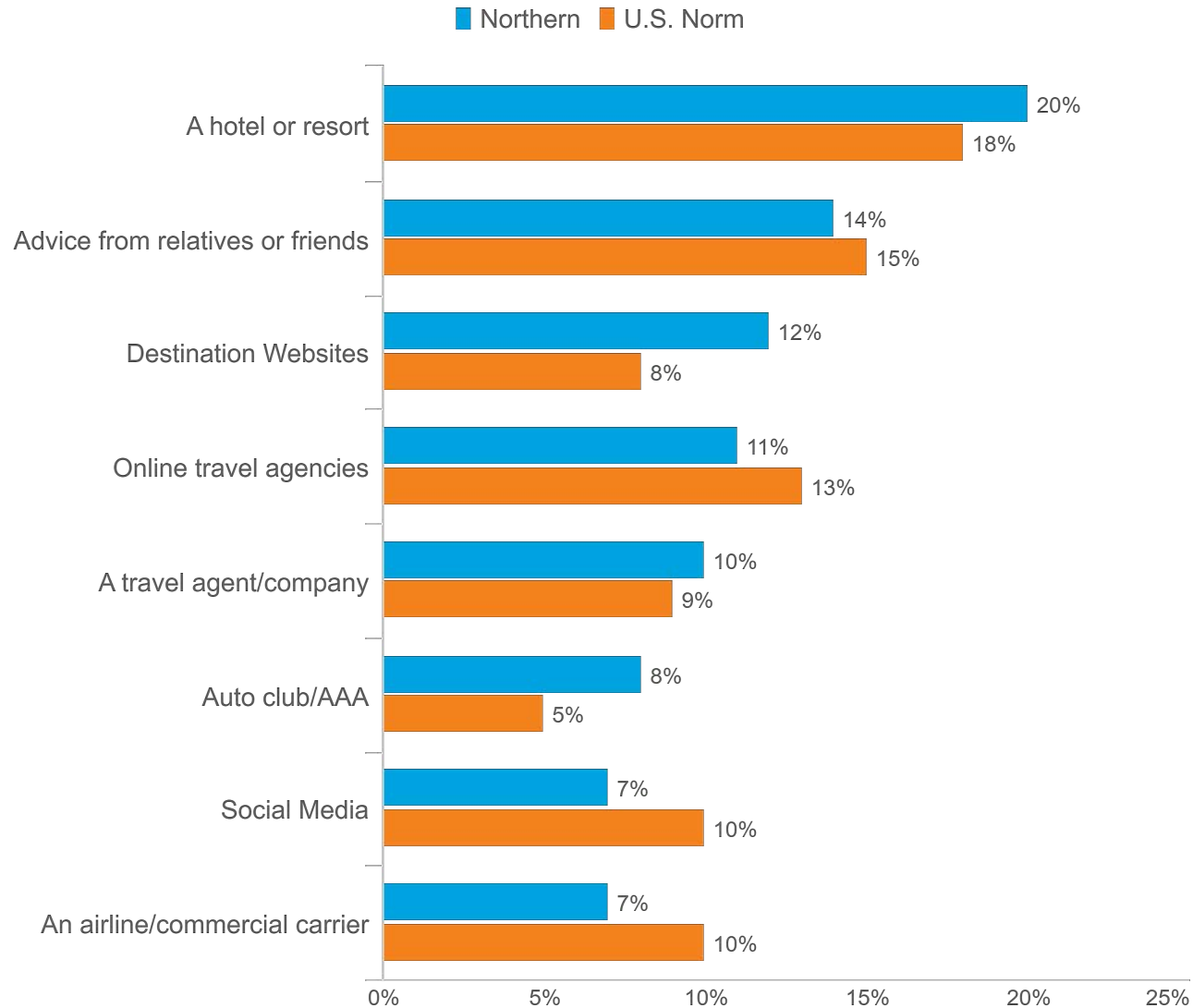
Type of Vehicle Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

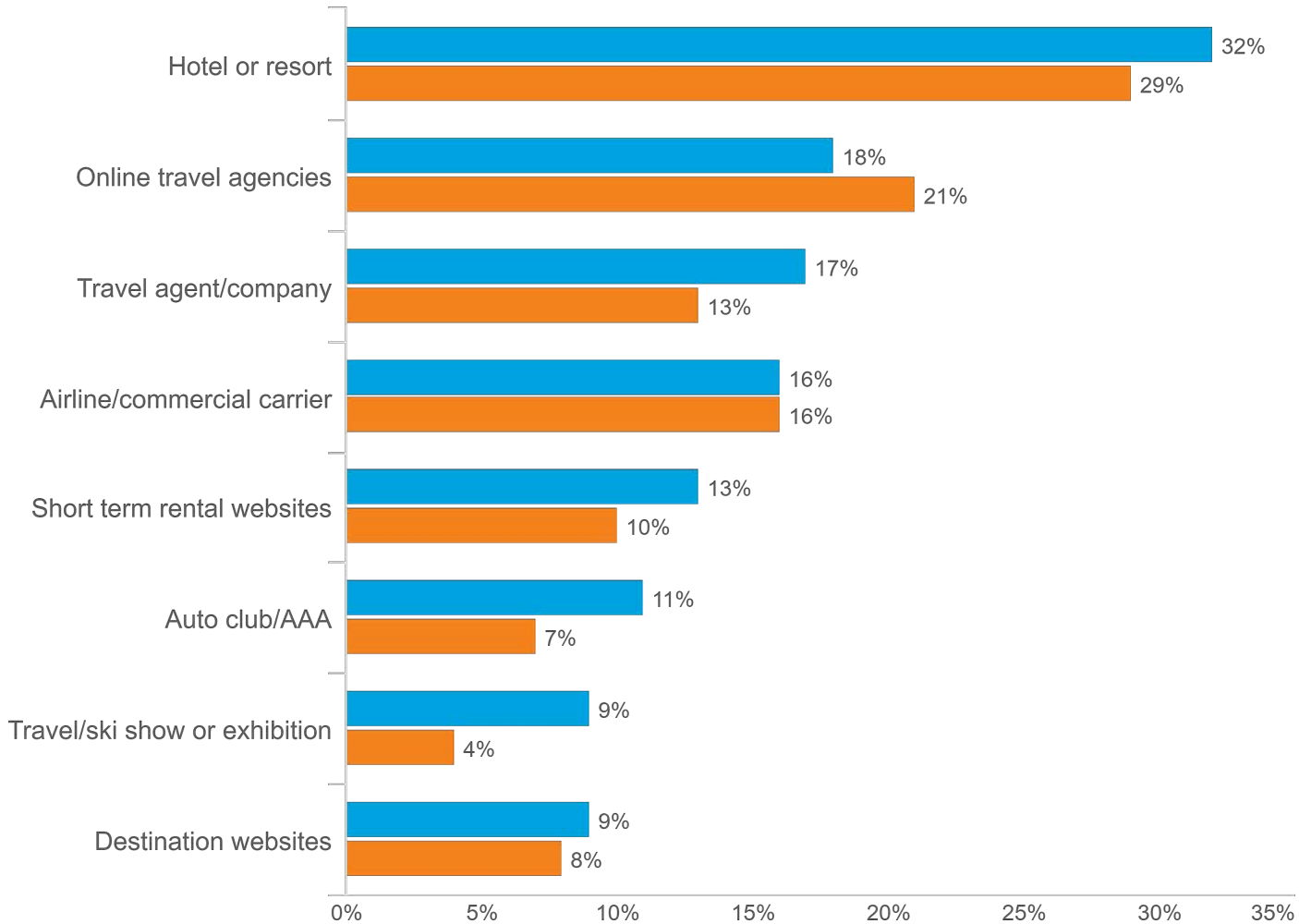
	Northern	U.S. Norm
Did not plan anything in advance	21%	15%
More than 1 year in advance	5%	4%
6-12 months	16%	13%
3-5 months	15%	18%
2 months	16%	17%
1 month or less	28%	33%

Northern's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ Northern ■ U.S. Norm



Accommodations

	Northern	U.S. Norm
 Hotel	32%	42%
 Home of friends / relatives	19%	22%
 Motel	17%	11%
 Resort hotel	13%	10%
 Bed & breakfast	9%	6%
 Campground / RV park	9%	5%
 Rented home / condo / apartment	7%	7%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities










U.S. Norm: 15%

Activities and Experiences (Top 10)

	Northern	U.S. Norm
Shopping	29%	26%
Sightseeing	23%	20%
Attending celebration	17%	15%
Casino	17%	11%
Bar/nightclub	15%	15%
Local parks/playgrounds	14%	10%
Landmark/historic site	13%	13%
Swimming	13%	14%
National/state park	11%	8%
Hiking/backpacking	11%	8%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Northern	U.S. Norm
 Shopping at locally owned businesses	51%	48%
 Convenience/grocery shopping	45%	42%
 Souvenir shopping	42%	38%
 Farmers market	39%	17%
 Big box stores (Walmart, Costco)	34%	30%
 Outlet/mall shopping	25%	44%
 Antiquing	21%	12%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

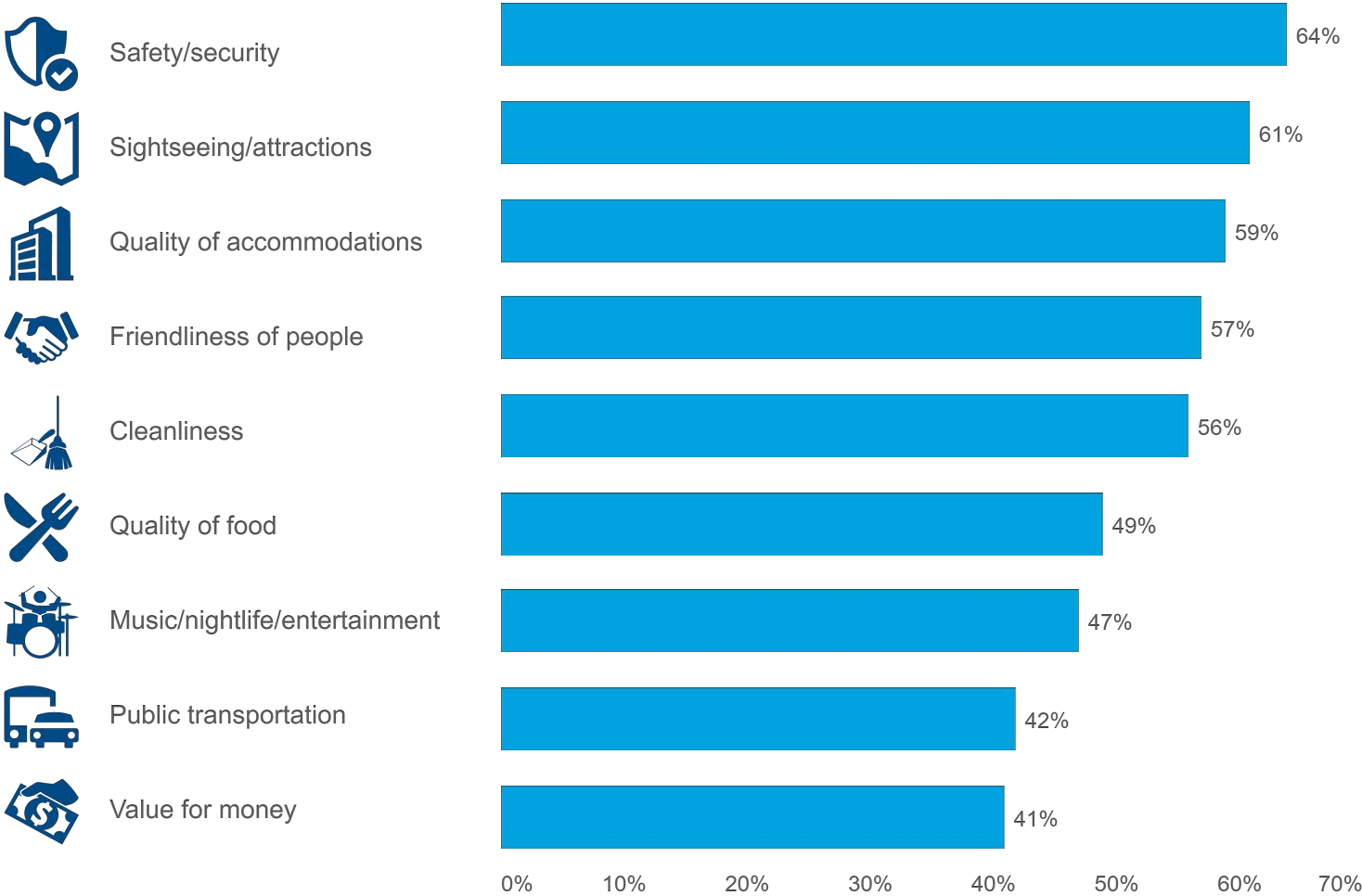
	Northern	U.S. Norm
 Casual dining	50%	56%
 Fast food	44%	45%
 Unique/local food	38%	30%
 Carry-out/food delivery service	26%	22%
 Picnicking	21%	11%
 Fine/upscale dining	16%	19%

Question updated in 2023, data is for 2023 only



71%
of overnight travelers were
very satisfied with their overall
trip experience

% Very Satisfied with Trip

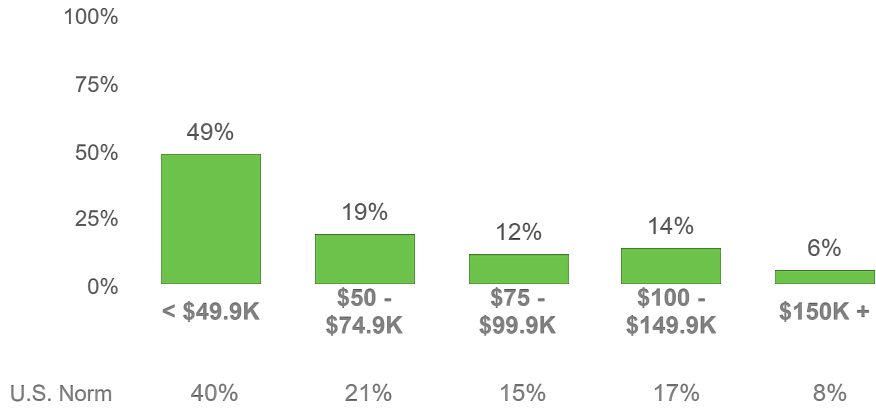


*Very Satisfied = selected top box on a five point scale

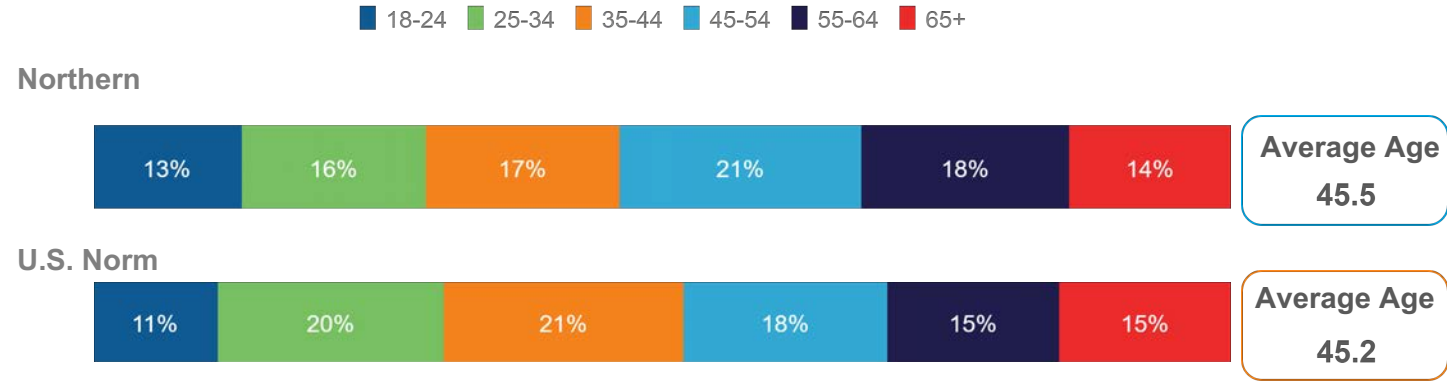
Demographic Profile of Overnight Northern Visitors

Base: 2022/2023 Overnight Person-Trips

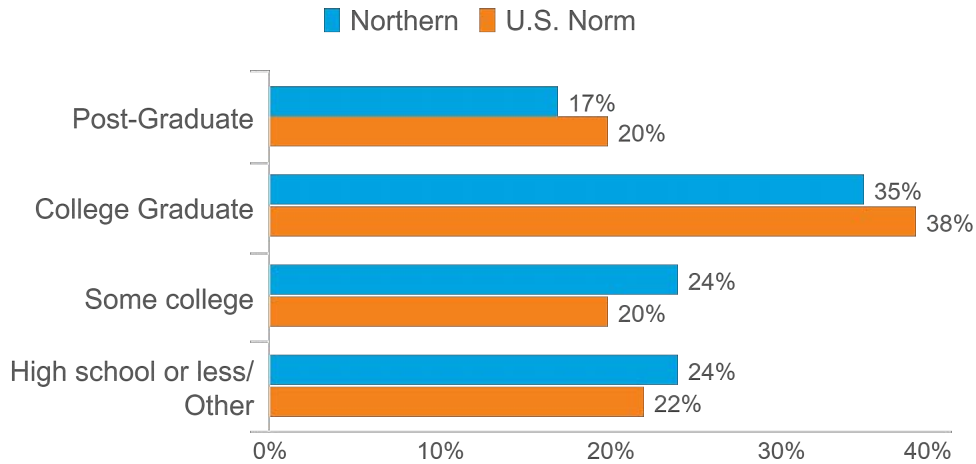
Household Income



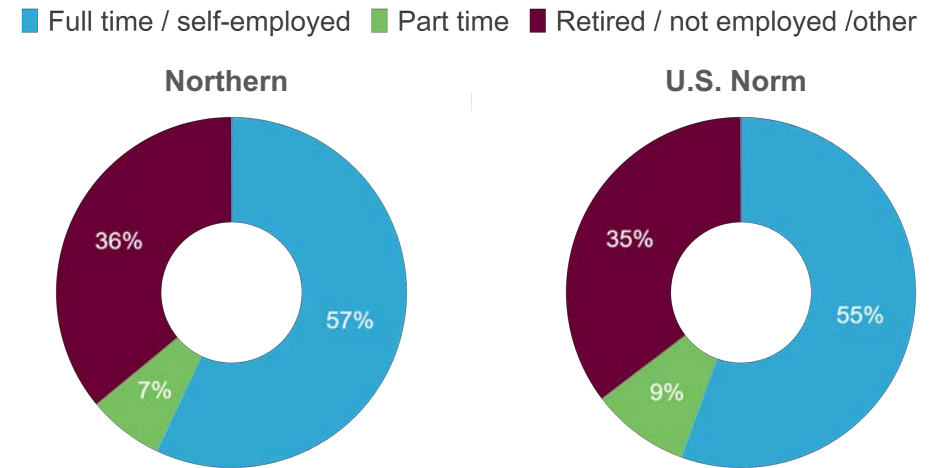
Age



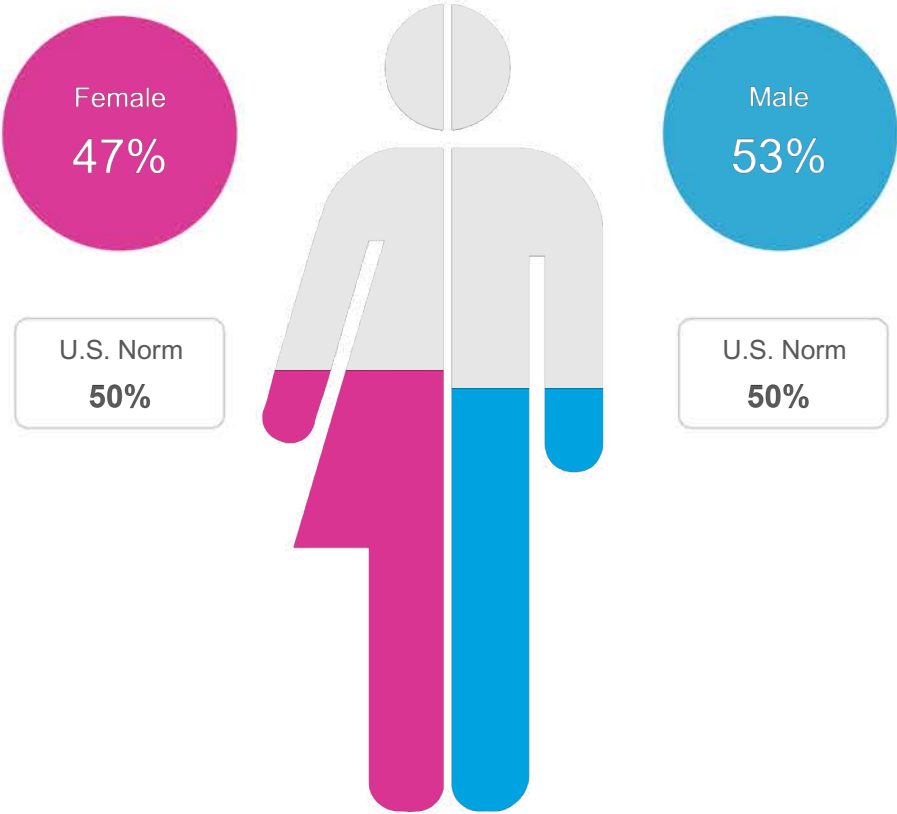
Educational Attainment



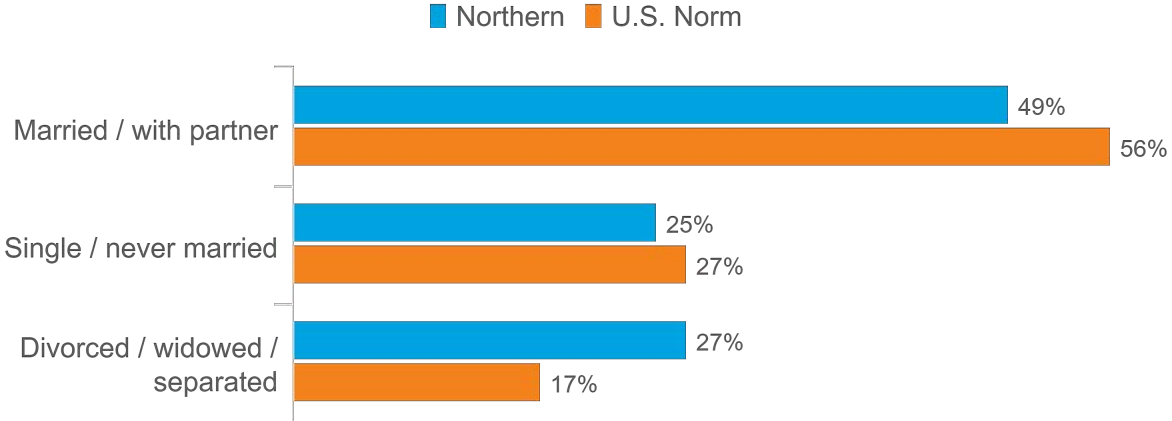
Employment



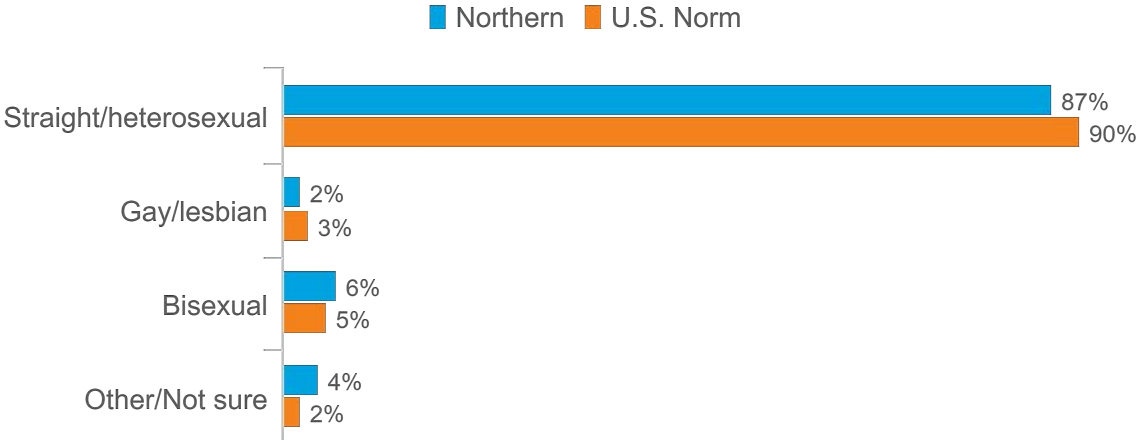
Gender



Marital Status



Sexual Orientation

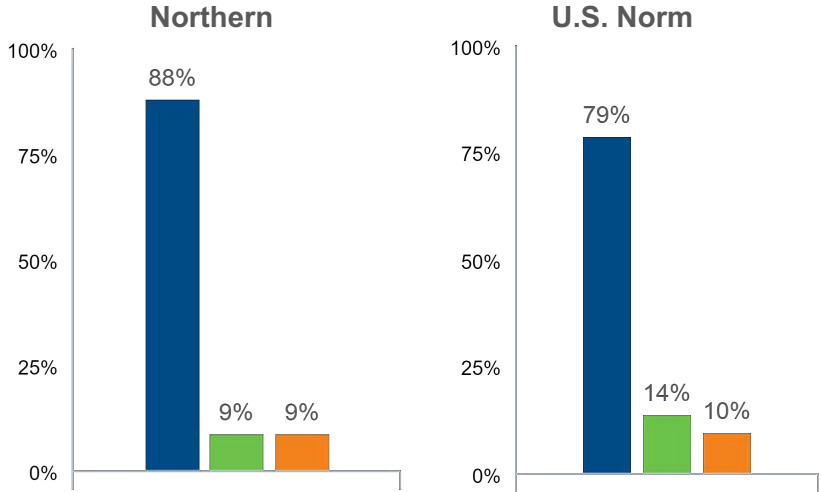


Demographic Profile of Overnight Northern Visitors

Base: 2022/2023 Overnight Person-Trips

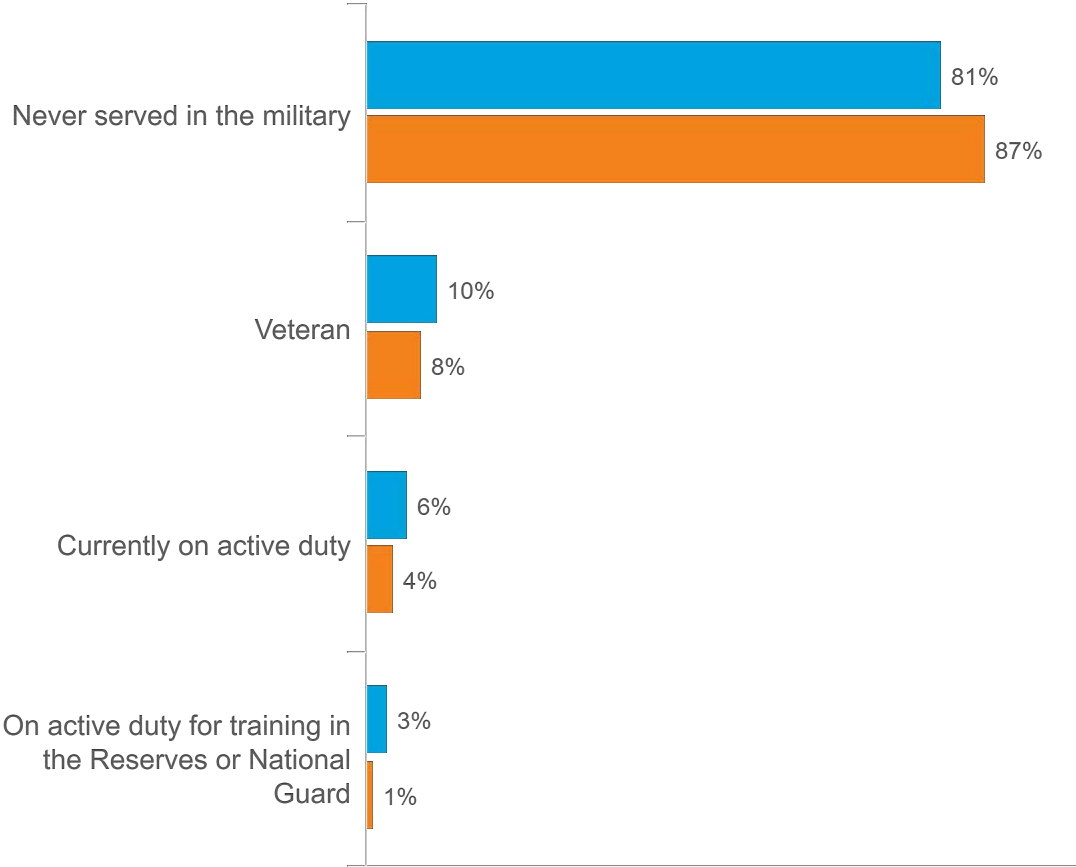
Race

White African-American Other



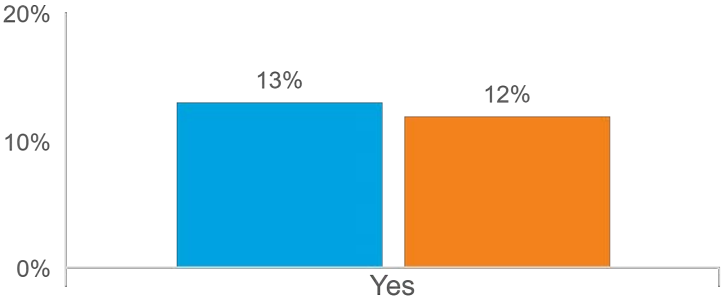
Military Status

Northern U.S. Norm

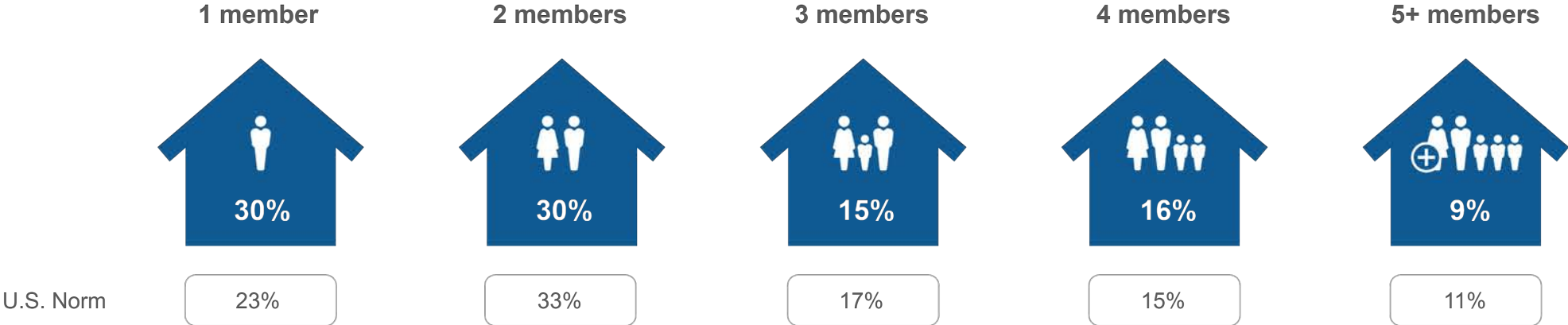


Hispanic Background

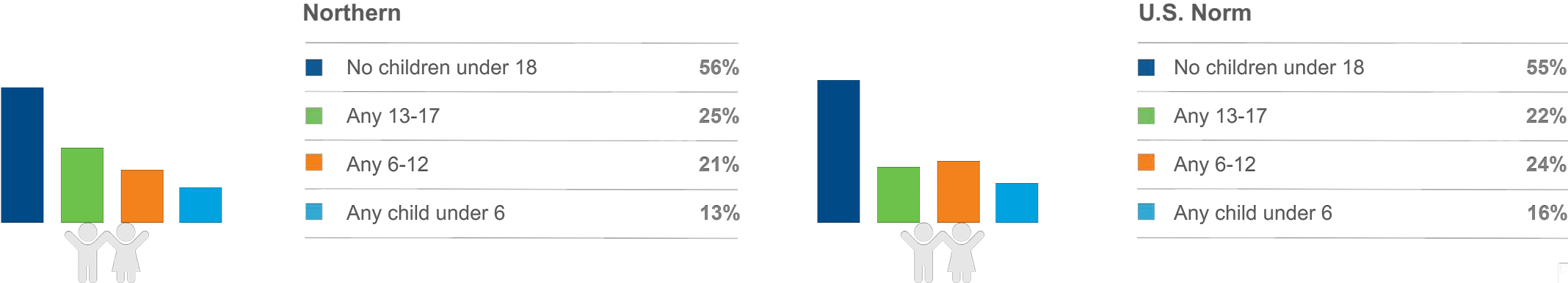
Northern U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: North Central Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
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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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For North Central, the following sample was achieved in 2022/2023:



Overnight Base Size

230

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

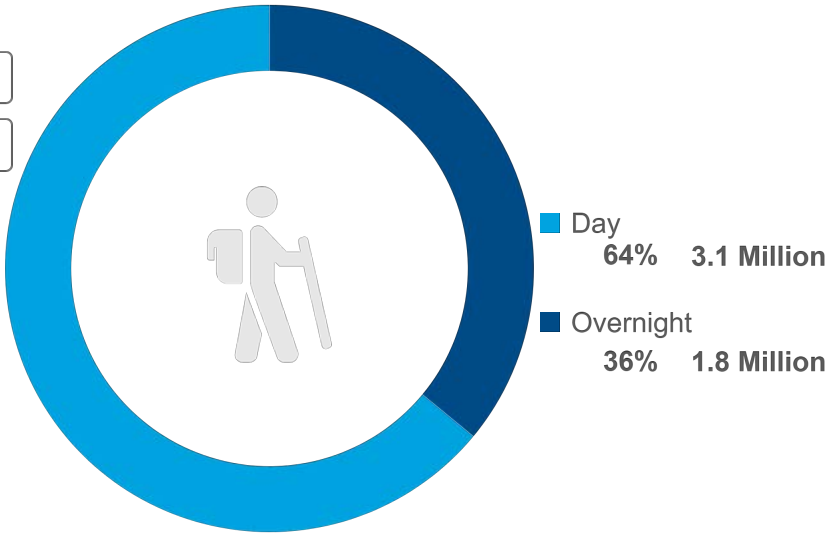
Total Size of North Central 2023 Domestic Travel Market

Total Person-Trips

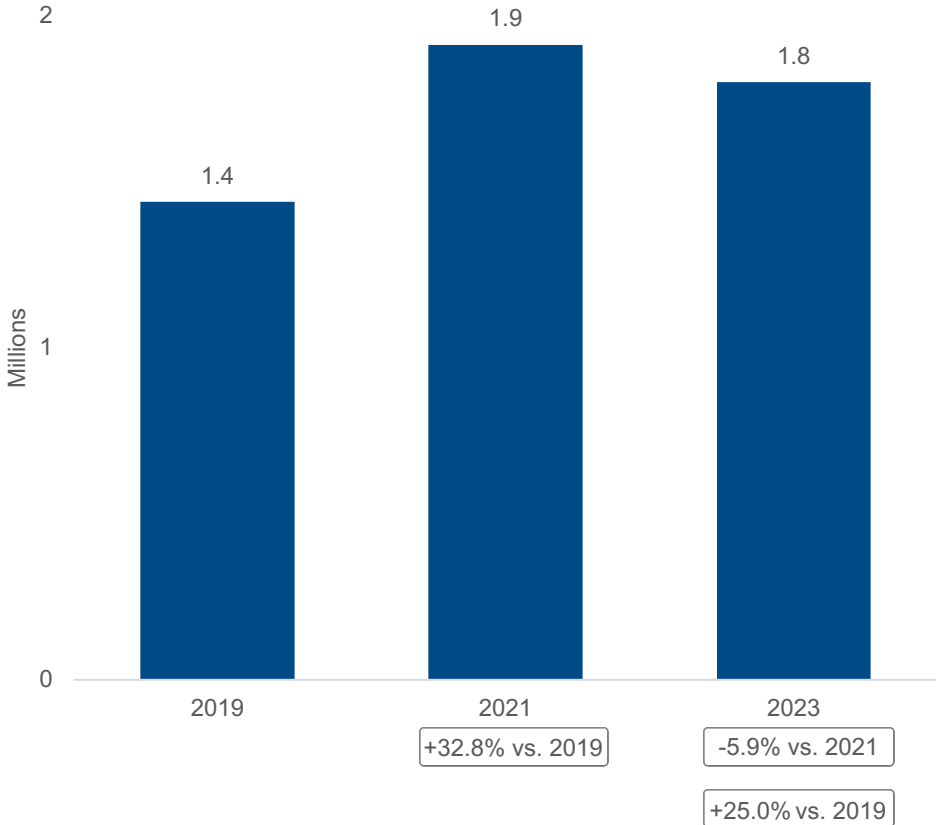
4.9 Million

+0.3% vs. 2021

+29.4% vs. 2019



Overnight Trips to North Central




Past Visitation to North Central

Base: 2022/2023 Overnight Person-Trips

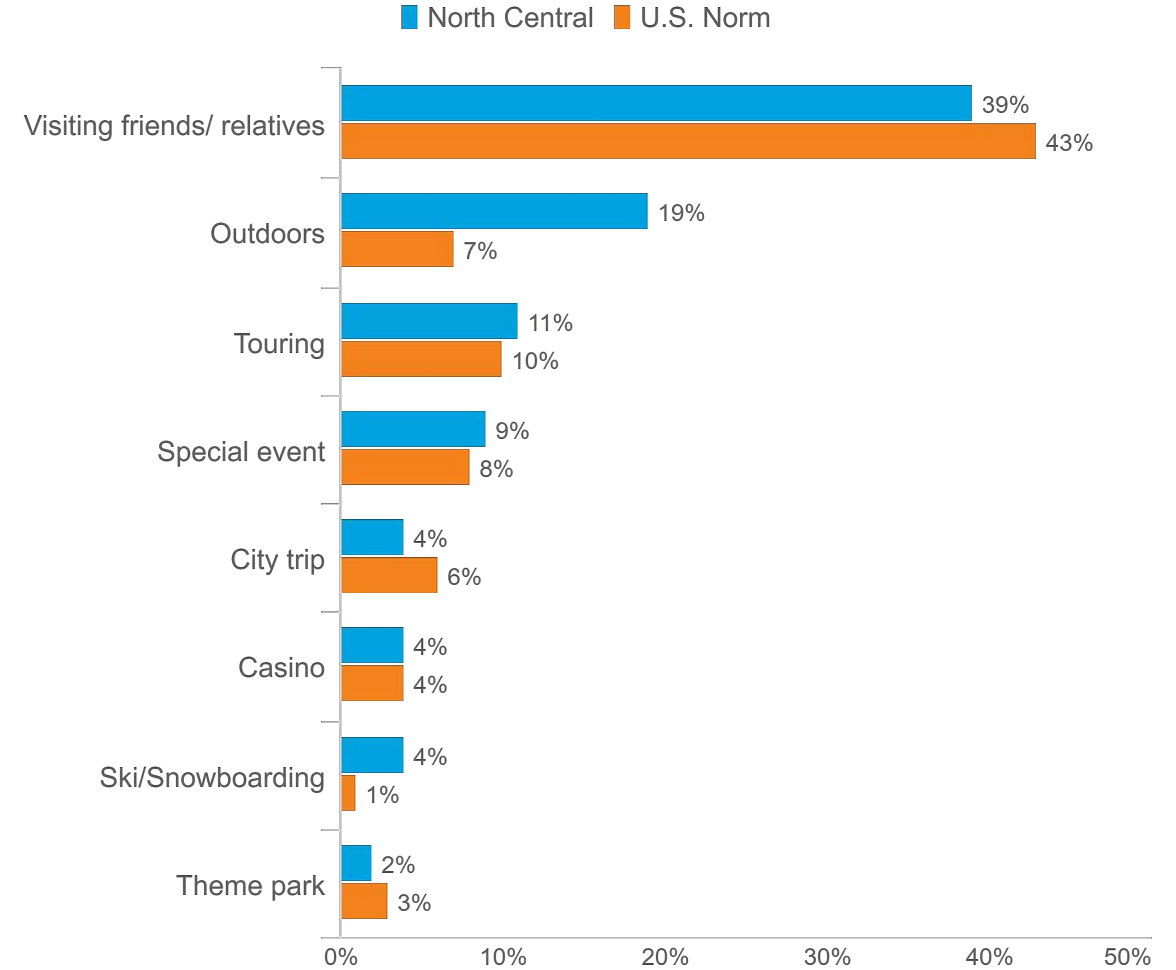
75% of overnight travelers to North Central are repeat visitors

52% of overnight travelers to North Central had visited before in the past 12 months

Main Purpose of Trip

 39% Visiting friends/ relatives	
 19% Outdoors	 <1% Conference/ Convention
 11% Touring	
 9% Special event	
 4% City trip	 4% Other business trip
 4% Casino	
 4% Ski/Snowboarding	 1% Business-Leisure
 2% Theme park	

Main Purpose of Leisure Trip

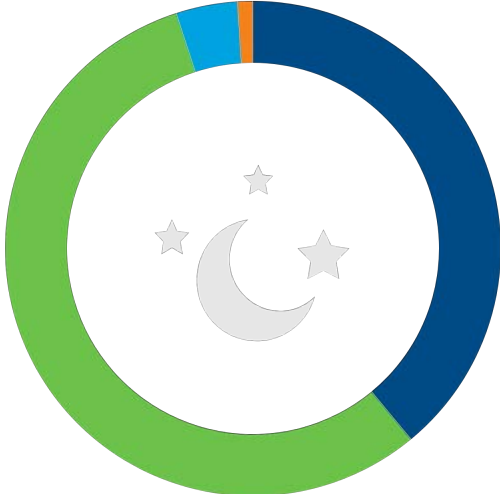


2023 U.S. Overnight Trips



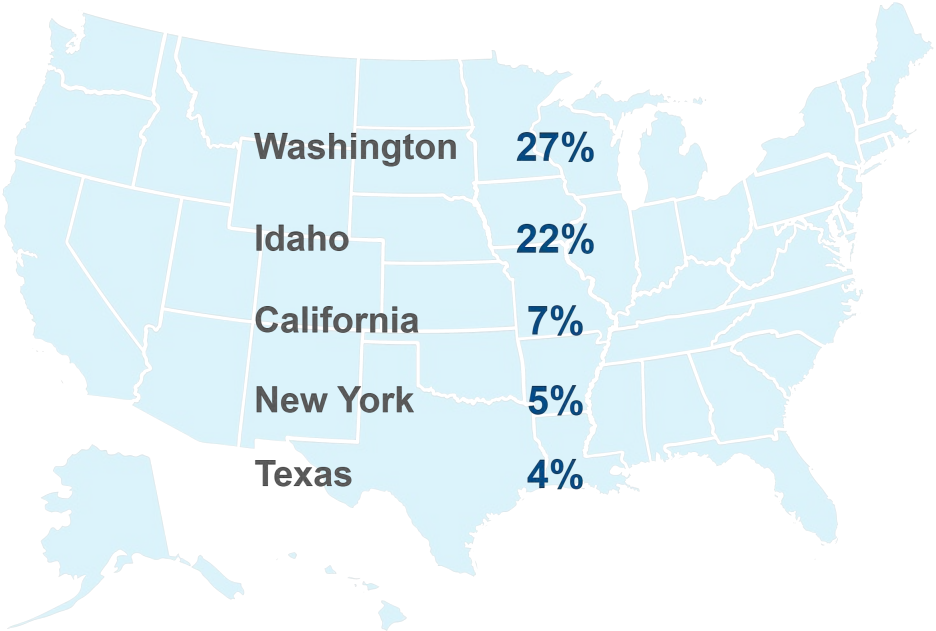
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

North Central Overnight Trips

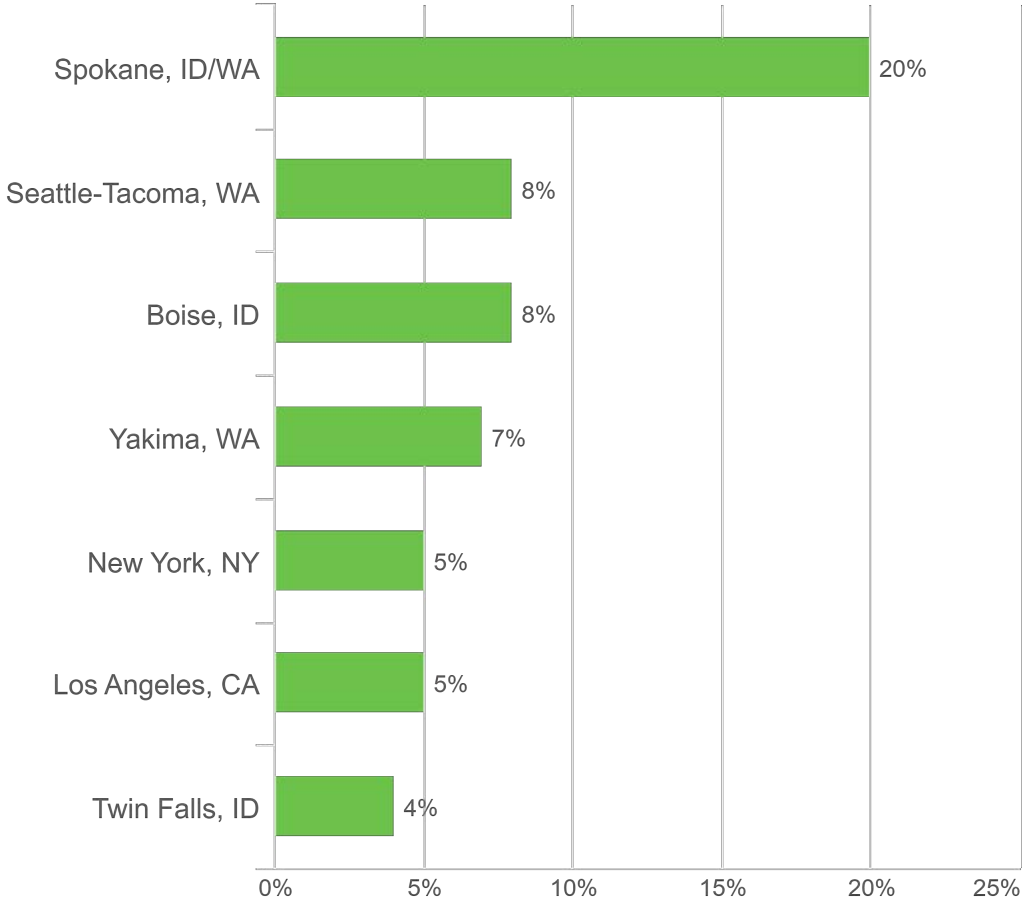


■ Visiting friends/relatives	39%
■ Marketable	56%
■ Business	4%
■ Business-leisure	1%

State Origin Of Trip



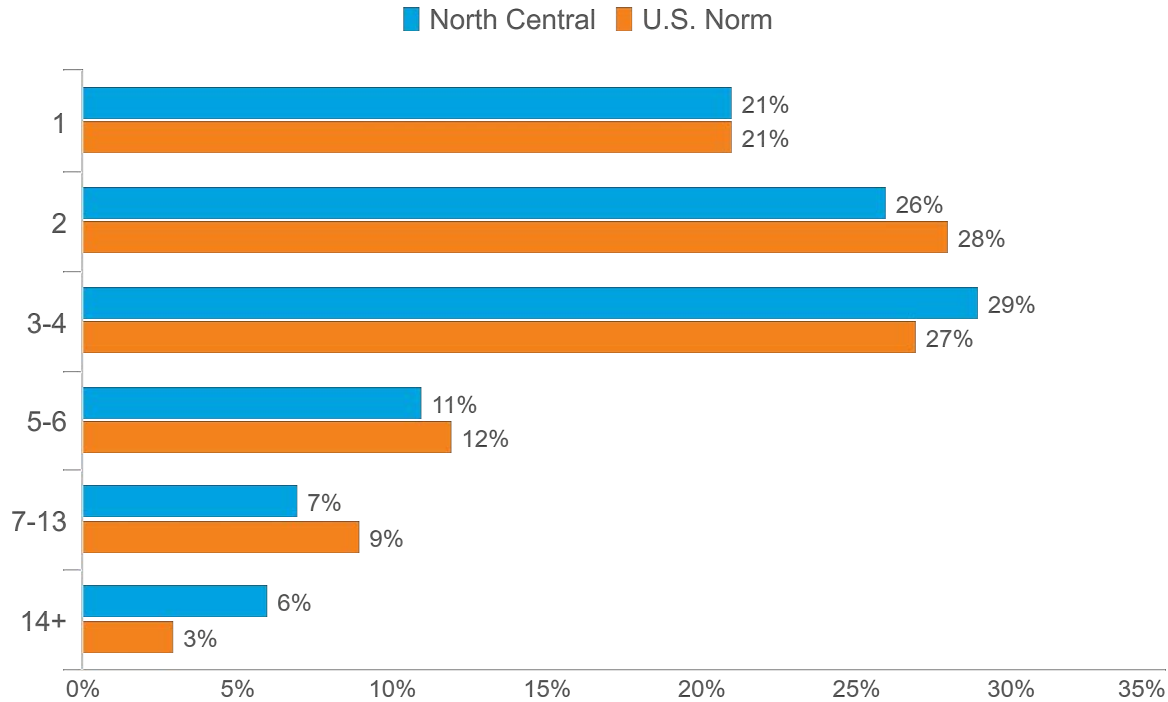
DMA Origin Of Trip



North Central's Overnight Trip Characteristics

Base: 2022/2023 Overnight Person-Trips

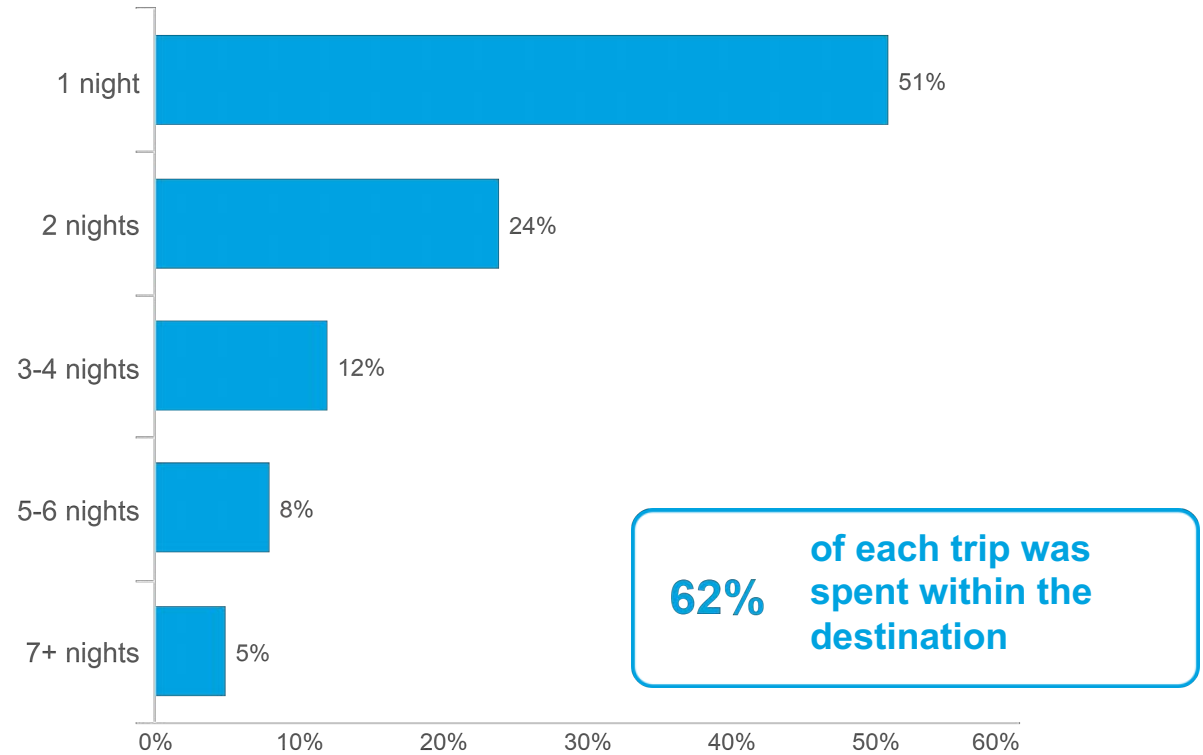
Total Nights Away on Trip



North Central
4.2
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in North Central



62% of each trip was spent within the destination

Average number of nights
2.6

Size of Travel Party

■ Adults ■ Children

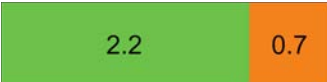
North Central



Average number of people

Total
3.1

U.S. Norm



Average number of people

Total
2.9

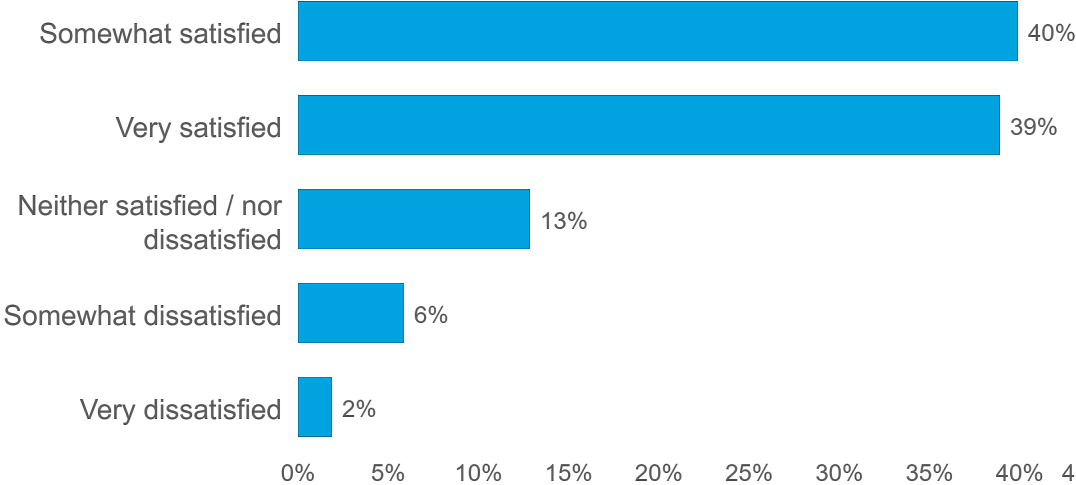


29% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



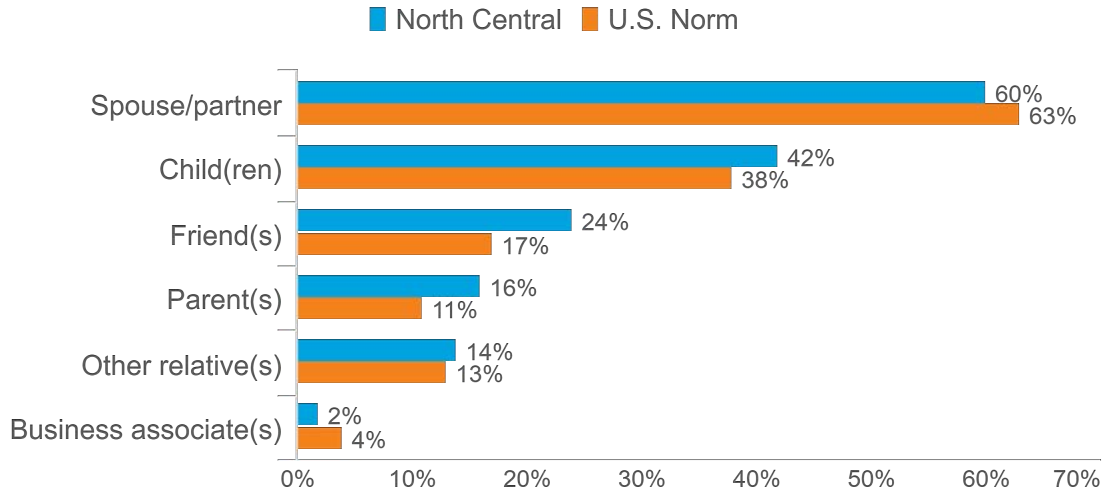


25% of trips only had one person in the travel party

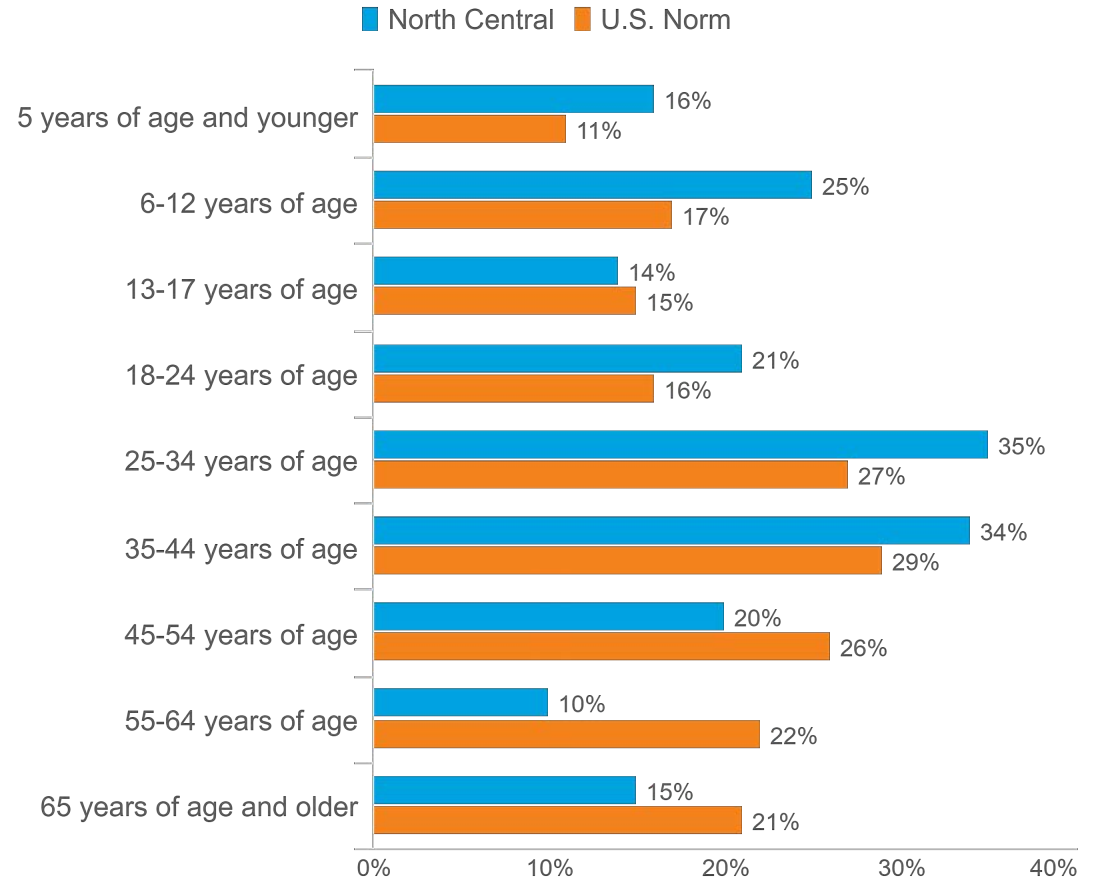
U.S. Norm: 24%

Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person

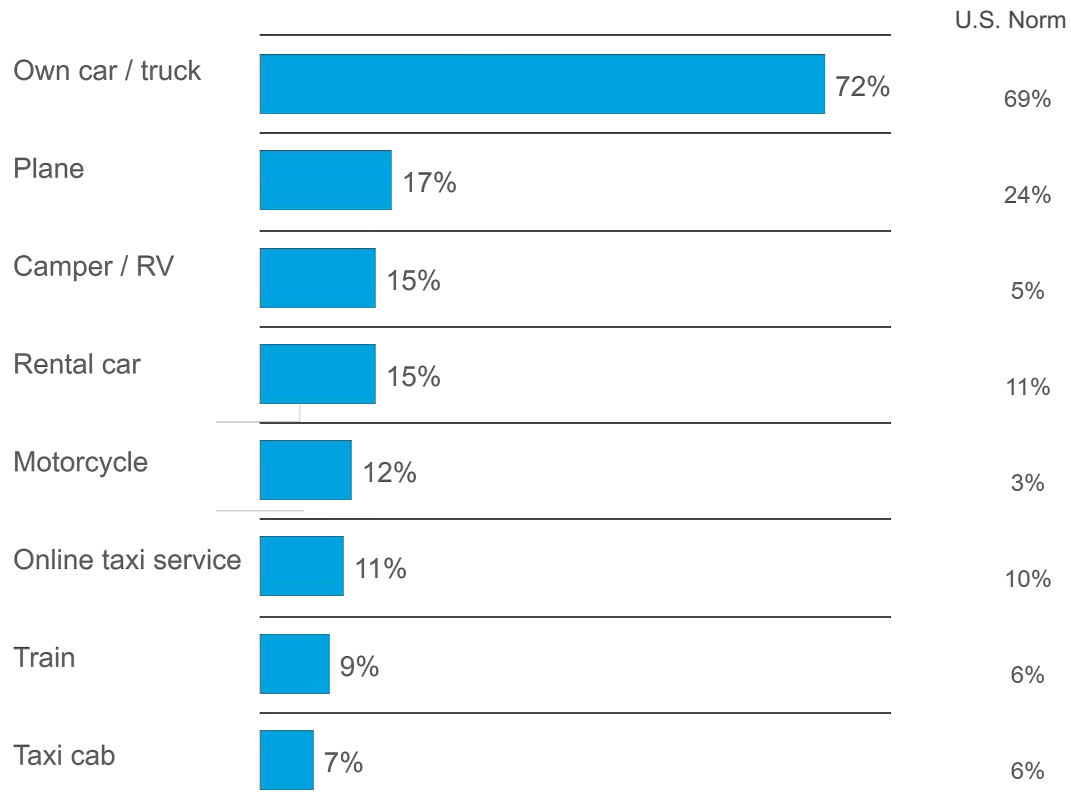


Travel Party Age

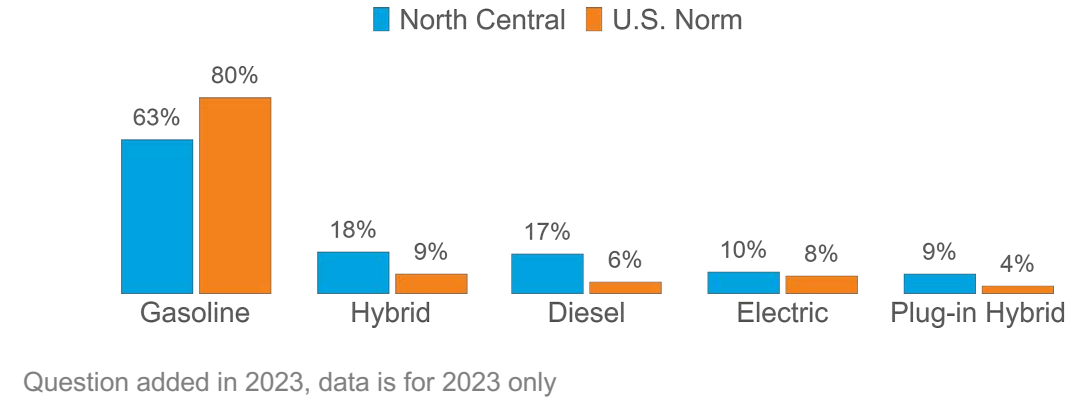


Question added in 2023, data is for 2023 only

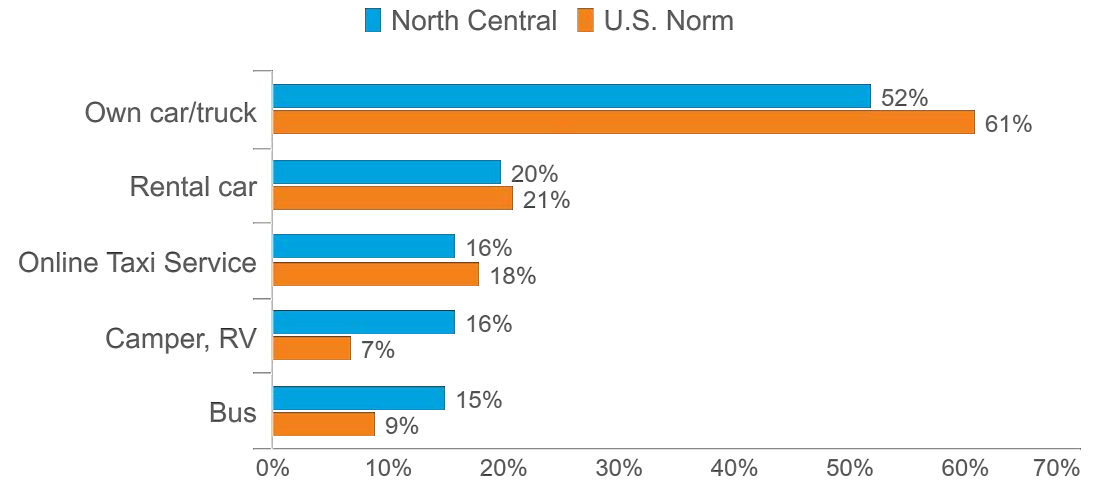
Transportation Used to get to Destination



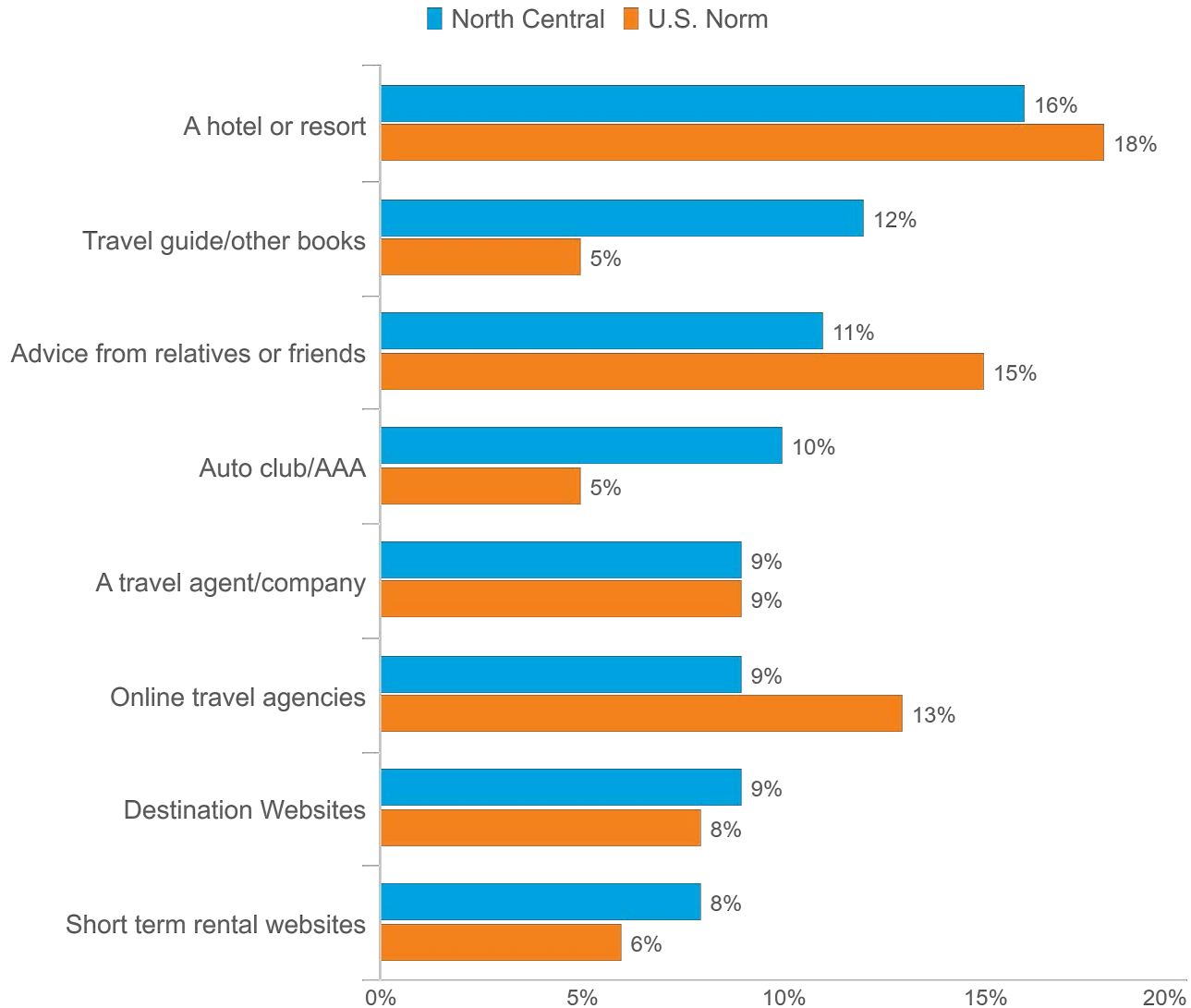
Type of Vehicle Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

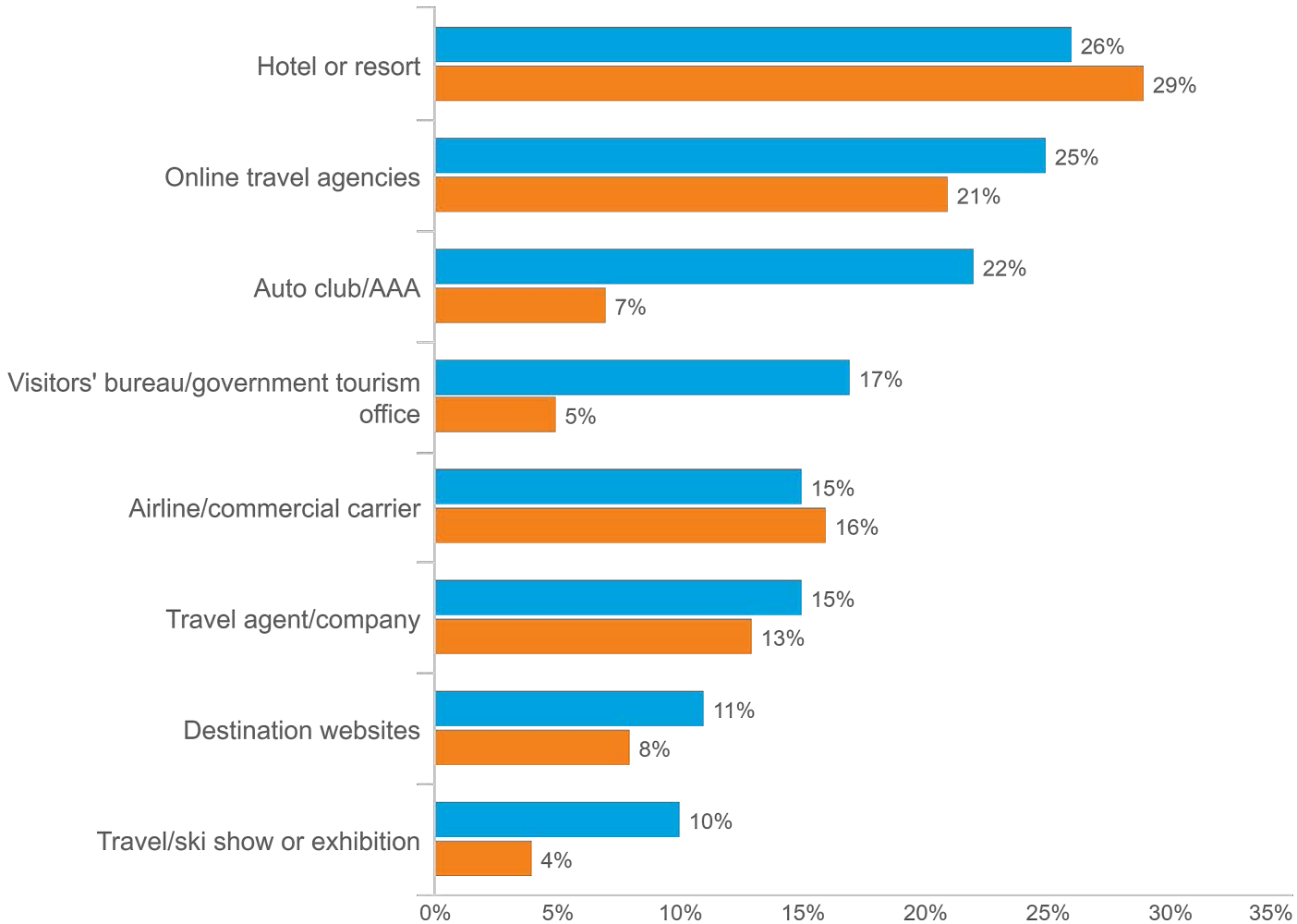
	North Central	U.S. Norm
Did not plan anything in advance	14%	15%
More than 1 year in advance	4%	4%
6-12 months	17%	13%
3-5 months	23%	18%
2 months	18%	17%
1 month or less	23%	33%

North Central's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ North Central ■ U.S. Norm



Accommodations

		North Central	U.S. Norm
	Hotel	34%	42%
	Motel	20%	11%
	Campground / RV park	18%	5%
	Home of friends / relatives	18%	22%
	Bed & breakfast	14%	6%
	Rented home / condo / apartment	10%	7%
	Resort hotel	9%	10%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities










U.S. Norm: 15%

Activities and Experiences (Top 10)

	North Central	U.S. Norm
Shopping	20%	26%
Sightseeing	19%	20%
Attending celebration	19%	15%
Camping	18%	5%
Bar/nightclub	18%	15%
Casino	17%	11%
Hiking/backpacking	16%	8%
Local parks/playgrounds	14%	10%
Convention for personal interest	14%	5%
Museum	14%	11%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	North Central	U.S. Norm
 Big box stores (Walmart, Costco)	60%	30%
 Shopping at locally owned businesses	52%	48%
 Convenience/grocery shopping	47%	42%
 Souvenir shopping	41%	38%
 Farmers market	31%	17%
 Outlet/mall shopping	14%	44%
 Antiquing	11%	12%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

	North Central	U.S. Norm
 Fast food	49%	45%
 Casual dining	37%	56%
 Unique/local food	34%	30%
 Picnicking	27%	11%
 Carry-out/food delivery service	23%	22%
 Fine/upscale dining	16%	19%

Question updated in 2023, data is for 2023 only



62%
of overnight travelers were
very satisfied with their overall
trip experience



Safety/security



Quality of accommodations



Cleanliness



Friendliness of people



Sightseeing/attractions



Quality of food



Value for money



Music/nightlife/entertainment



Public transportation



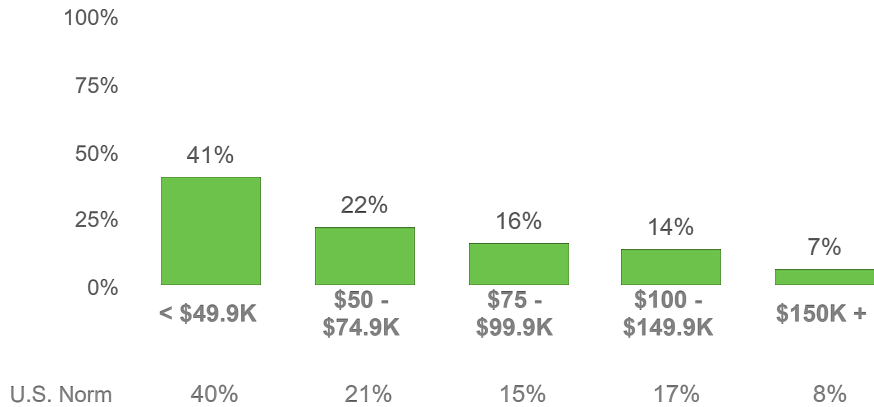
0% 10% 20% 30% 40% 50% 60%

*Very Satisfied = selected top box on a five point scale

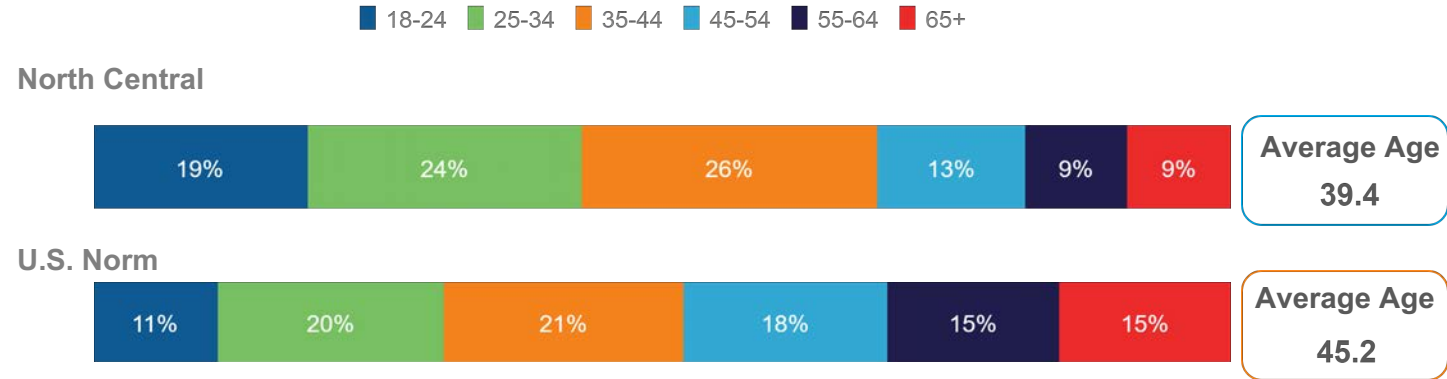
Demographic Profile of Overnight North Central Visitors

Base: 2022/2023 Overnight Person-Trips

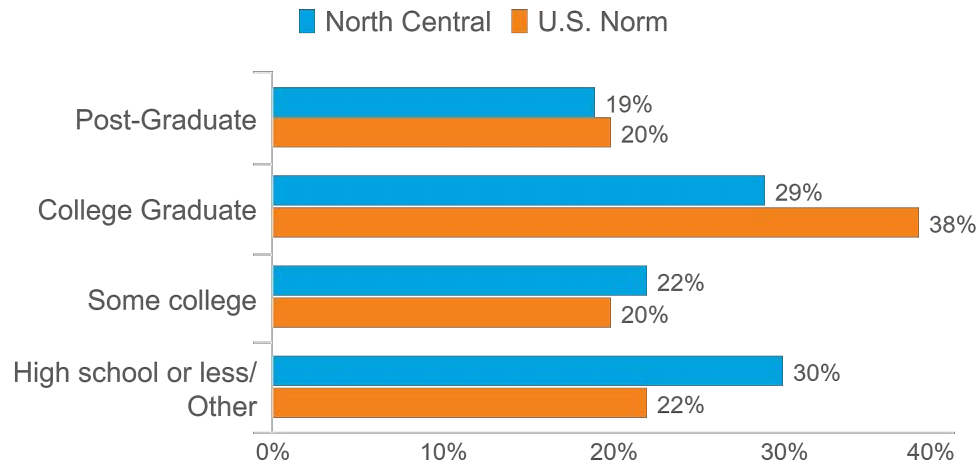
Household Income



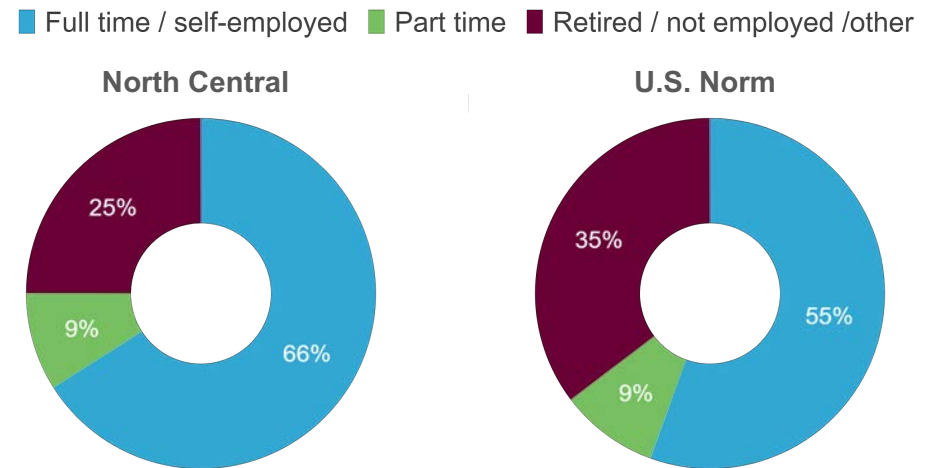
Age



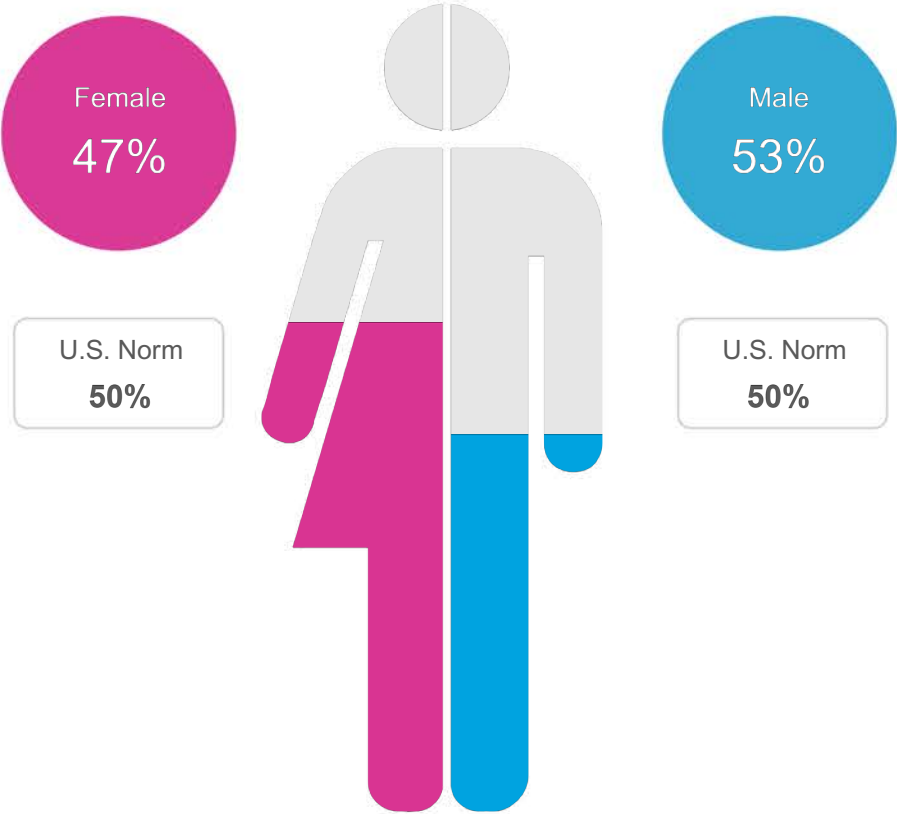
Educational Attainment



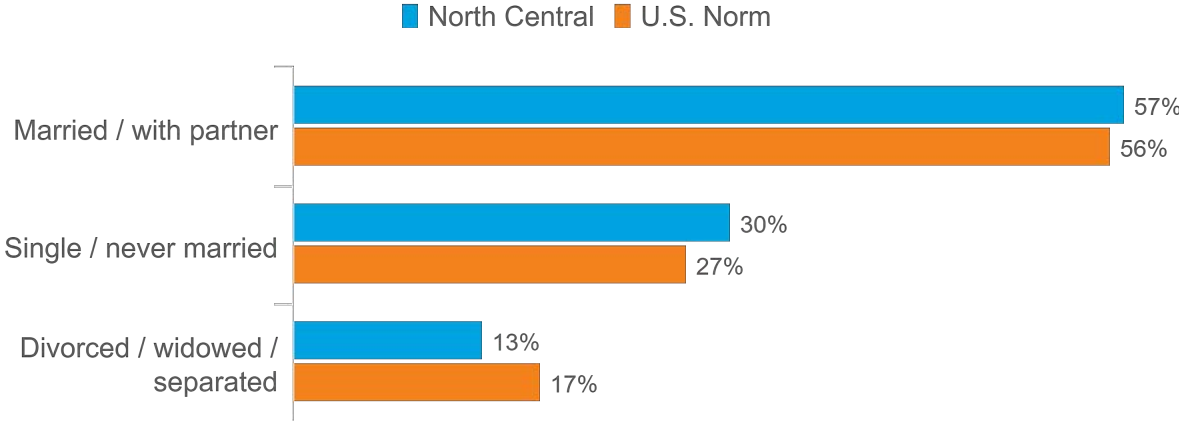
Employment



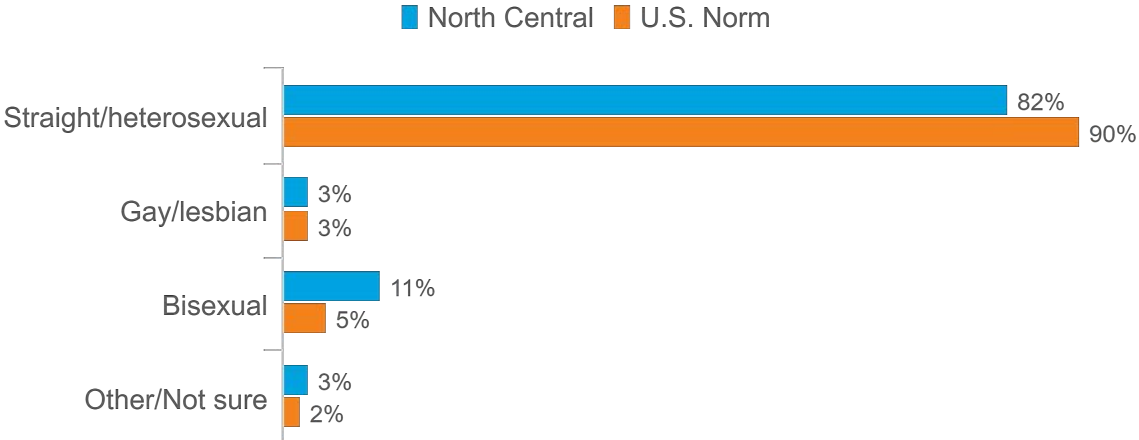
Gender



Marital Status



Sexual Orientation

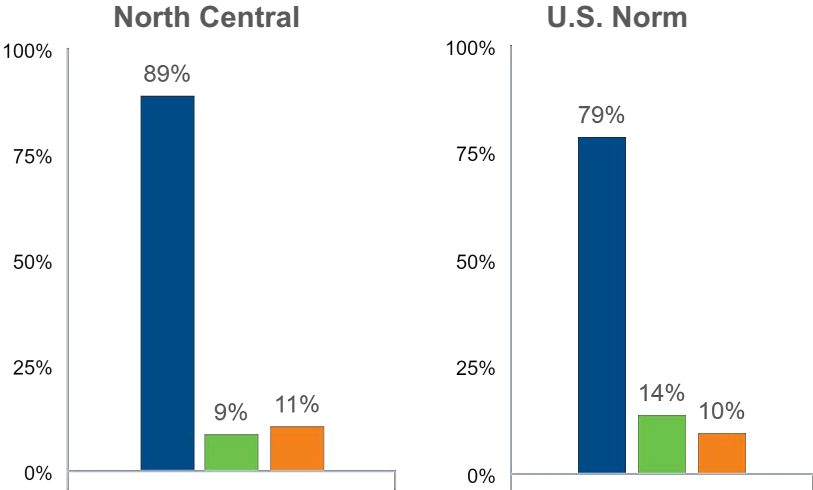


Demographic Profile of Overnight North Central Visitors

Base: 2022/2023 Overnight Person-Trips

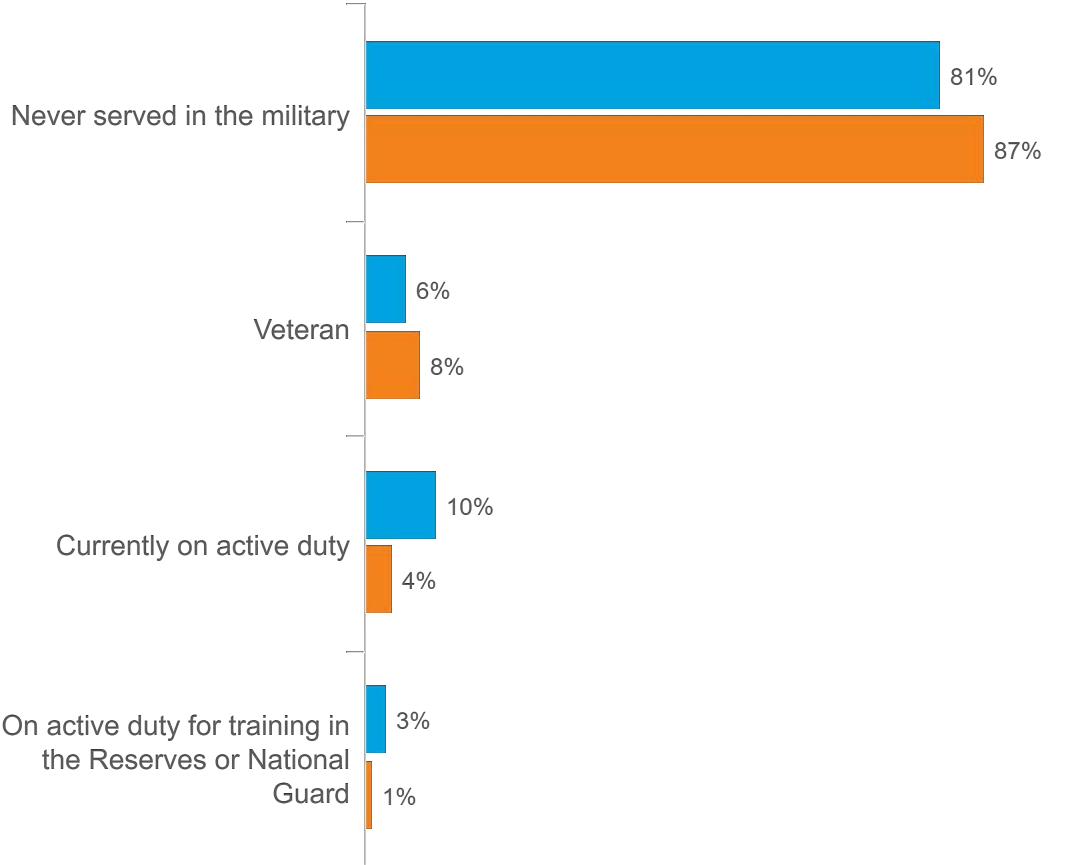
Race

White African-American Other



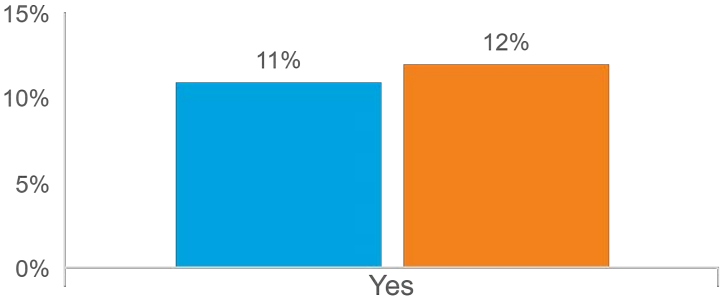
Military Status

North Central U.S. Norm

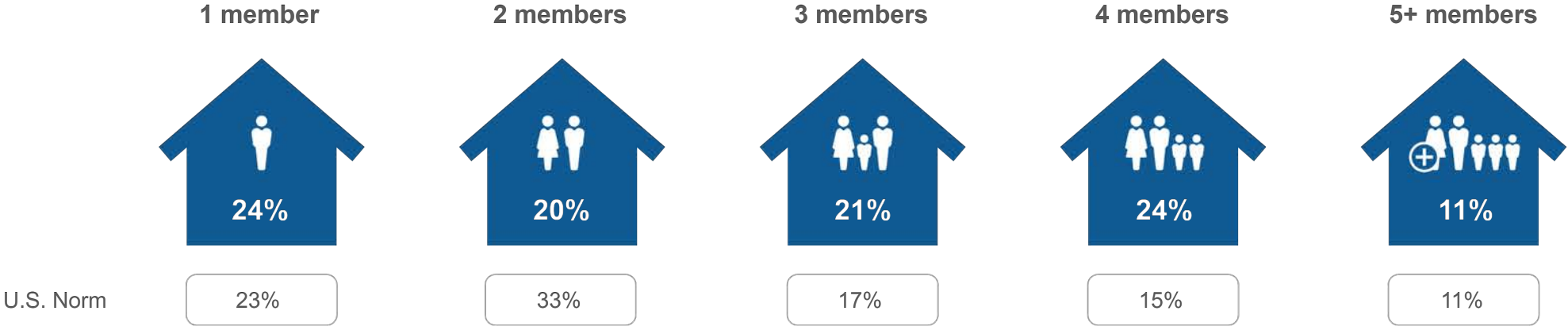


Hispanic Background

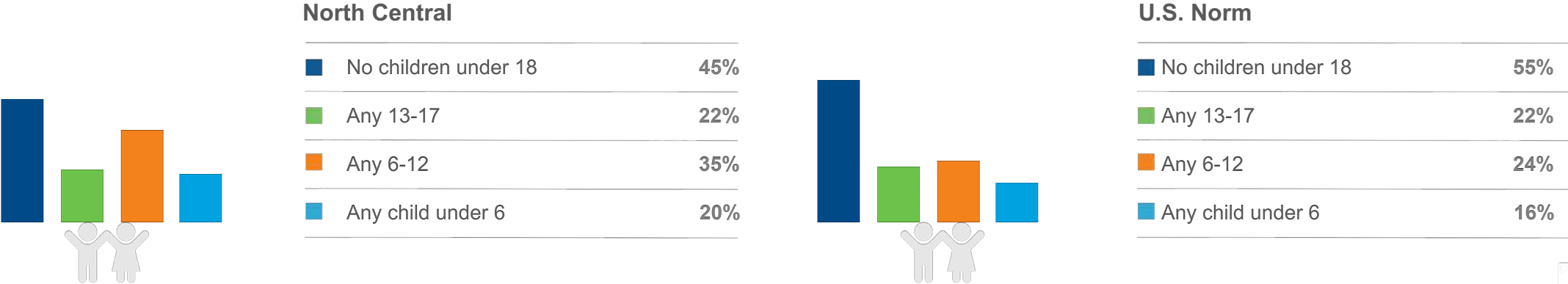
North Central U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: Central Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Central, the following sample was achieved in 2022/2023:



Overnight Base Size

251

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

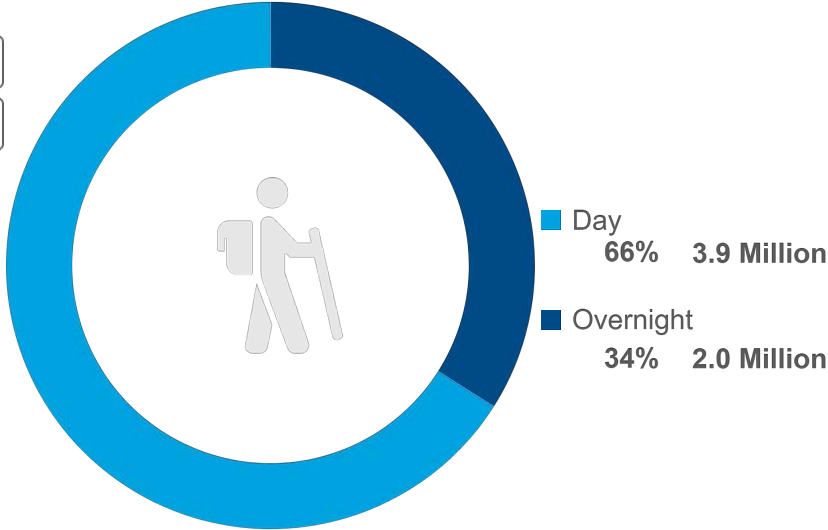
Total Size of Central 2023 Domestic Travel Market

Total Person-Trips

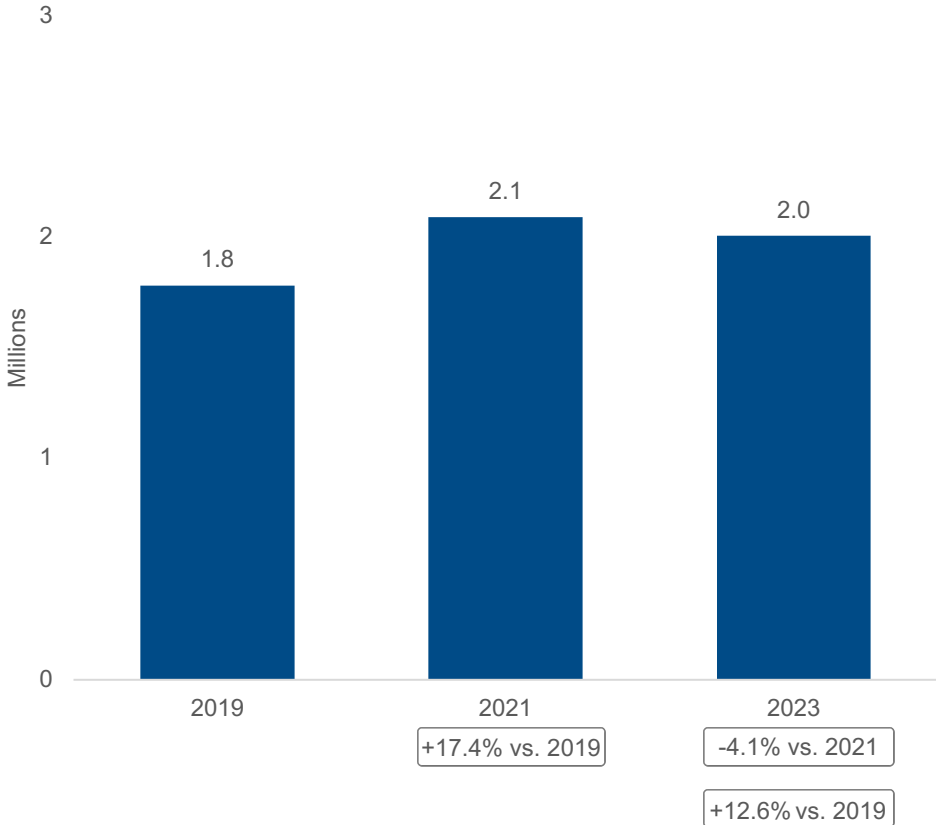
5.9 Million

-0.3% vs. 2021

+37.2% vs. 2019



Overnight Trips to Central







Past Visitation to Central

Base: 2022/2023 Overnight Person-Trips

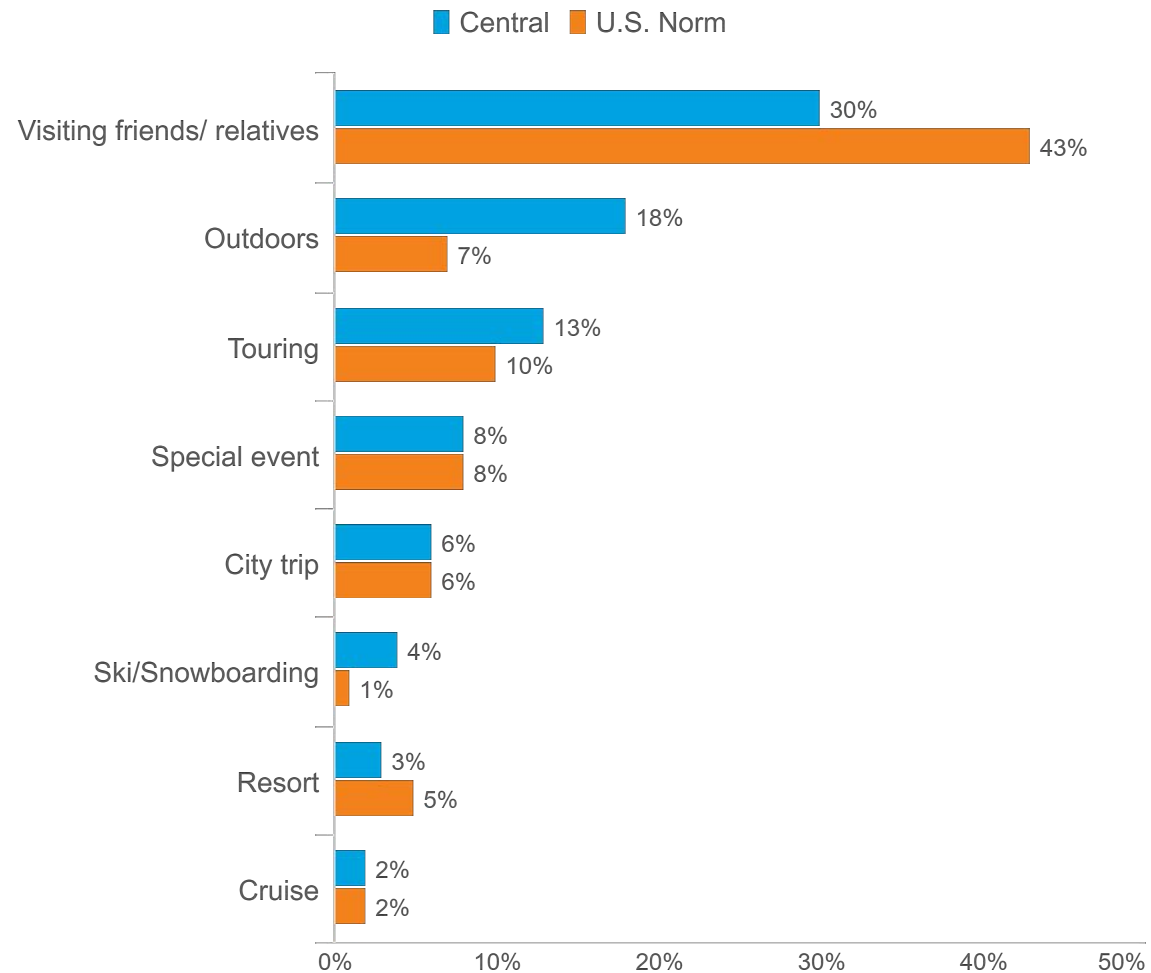
70% of overnight travelers to Central are repeat visitors

48% of overnight travelers to Central had visited before in the past 12 months

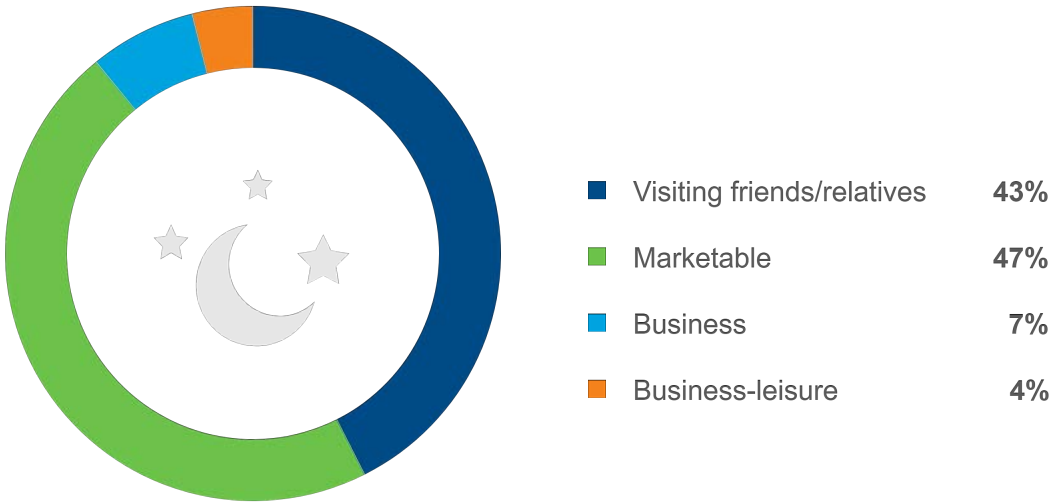
Main Purpose of Trip

 <p>30% Visiting friends/ relatives</p>	
 <p>18% Outdoors</p>	 <p>4% Conference/ Convention</p>
 <p>13% Touring</p>	
 <p>8% Special event</p>	
 <p>6% City trip</p>	 <p>3% Other business trip</p>
 <p>4% Ski/Snowboarding</p>	
 <p>3% Resort</p>	 <p>3% Business-Leisure</p>
 <p>2% Cruise</p>	

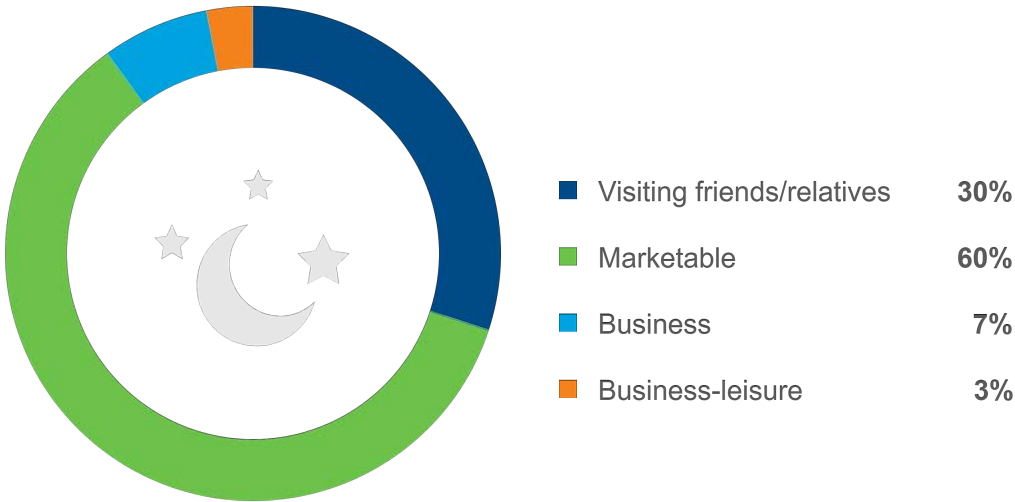
Main Purpose of Leisure Trip



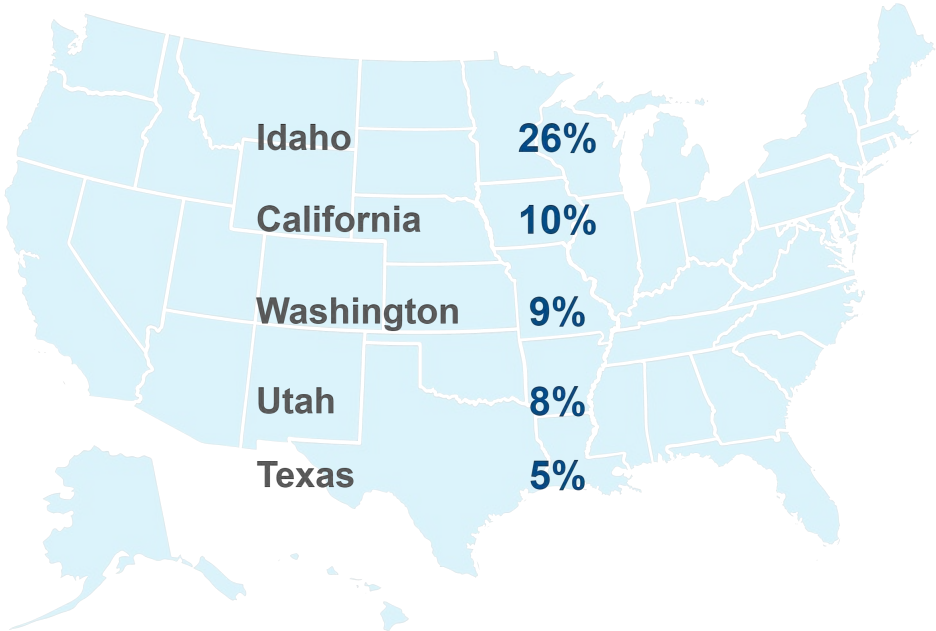
2023 U.S. Overnight Trips



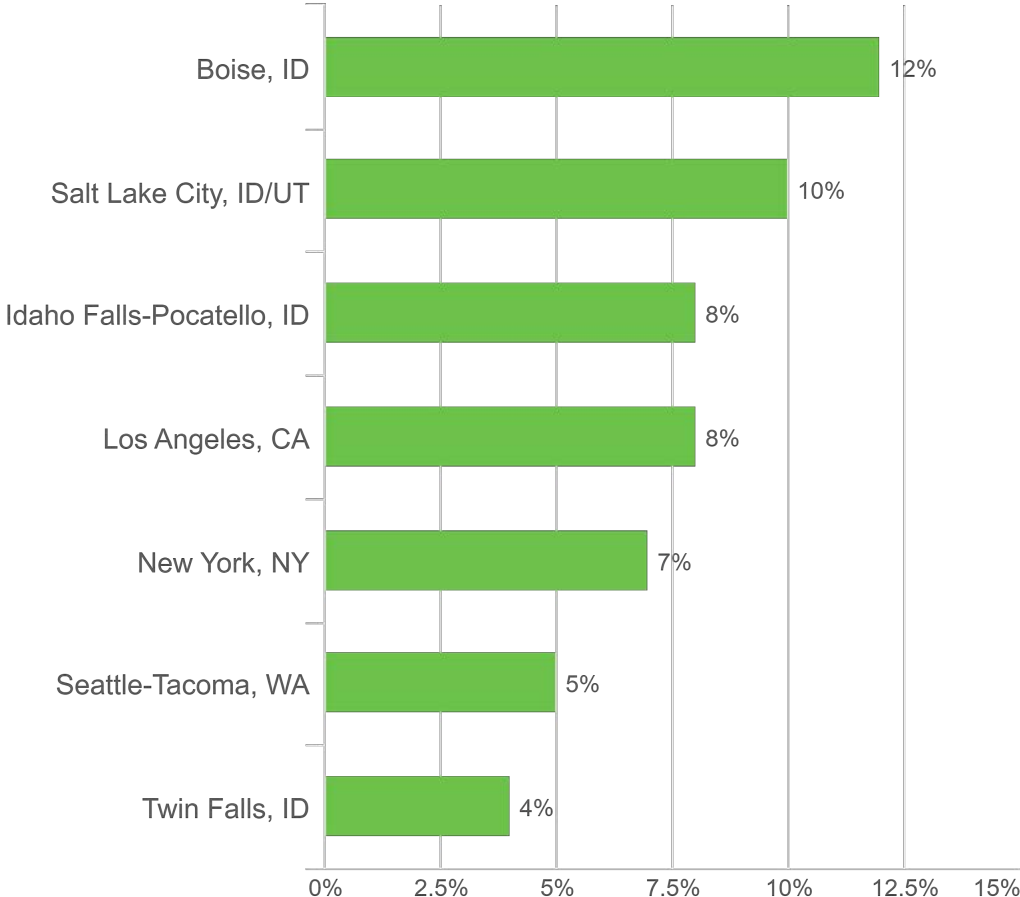
Central Overnight Trips



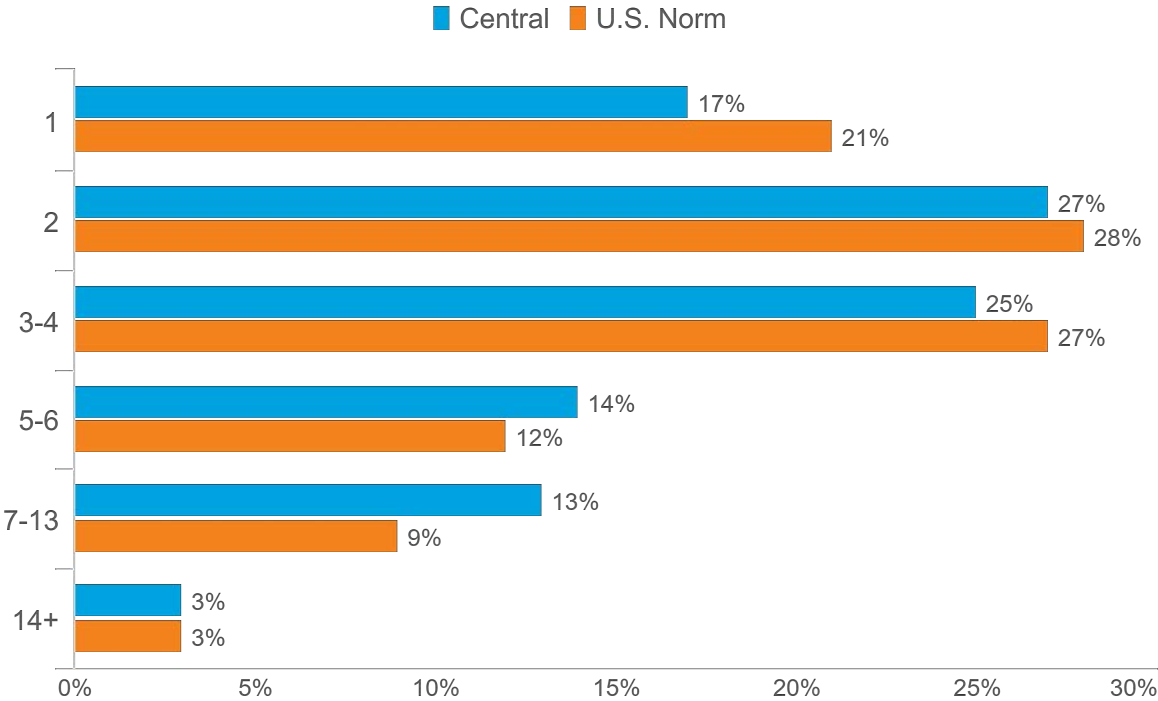
State Origin Of Trip



DMA Origin Of Trip



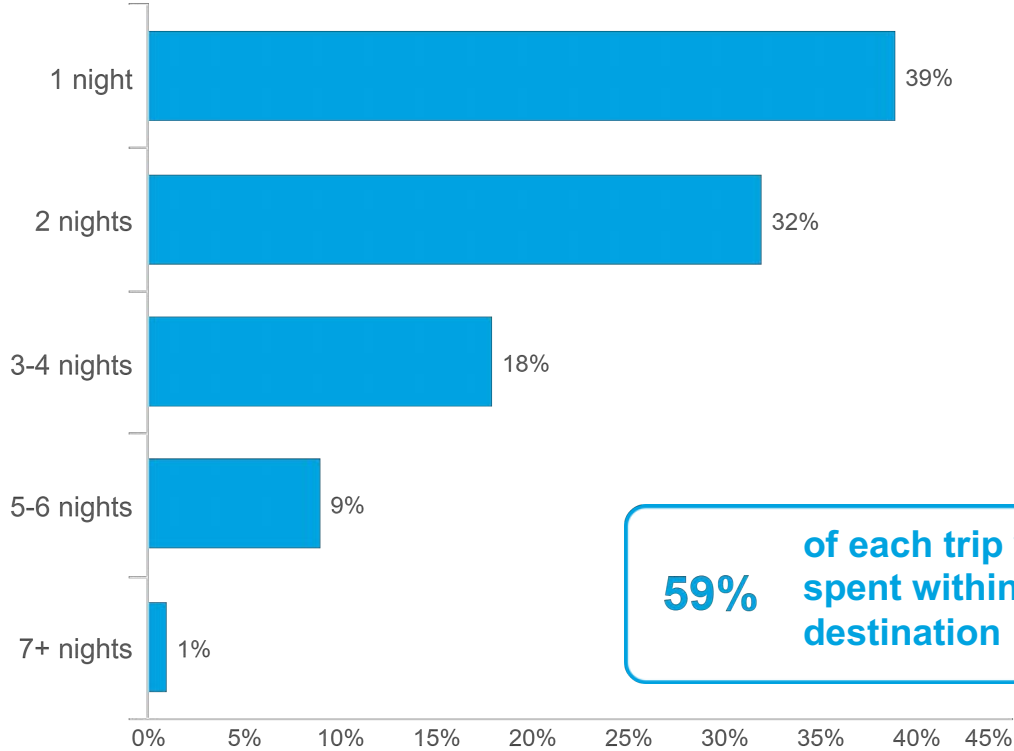
Total Nights Away on Trip



Central
4.1
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Central



59% of each trip was spent within the destination

Average number of nights
2.4

Size of Travel Party

■ Adults ■ Children

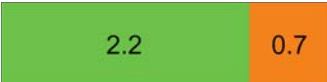
Central



Average number of people

Total
3.0

U.S. Norm



Average number of people

Total
2.9

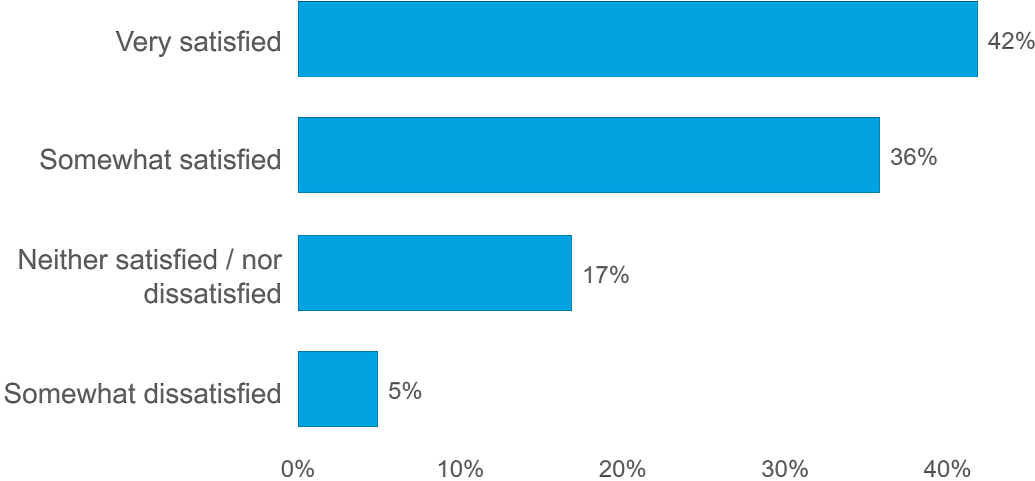


31% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



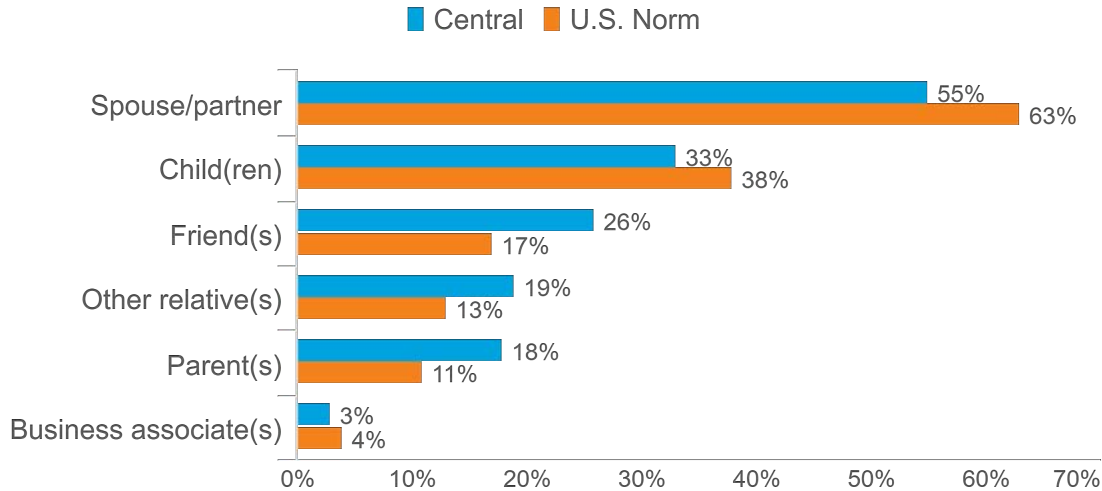


22% of trips only had one person in the travel party

U.S. Norm: **24%**

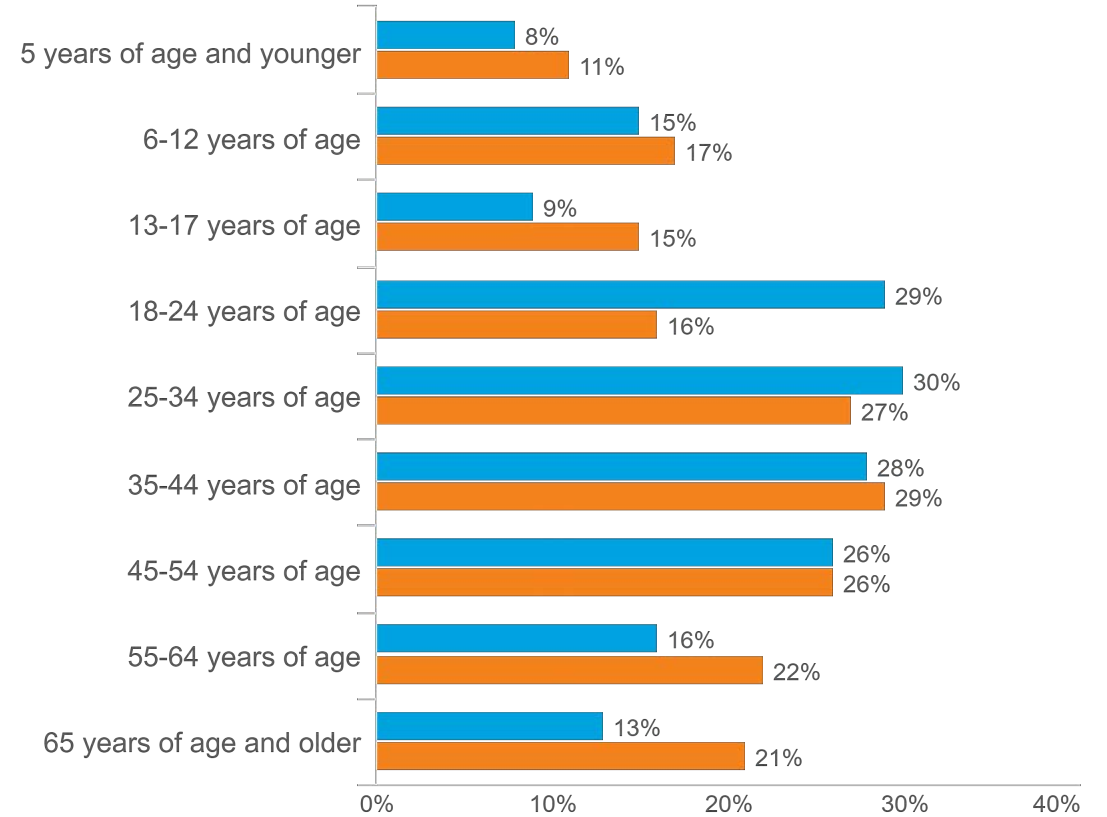
Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



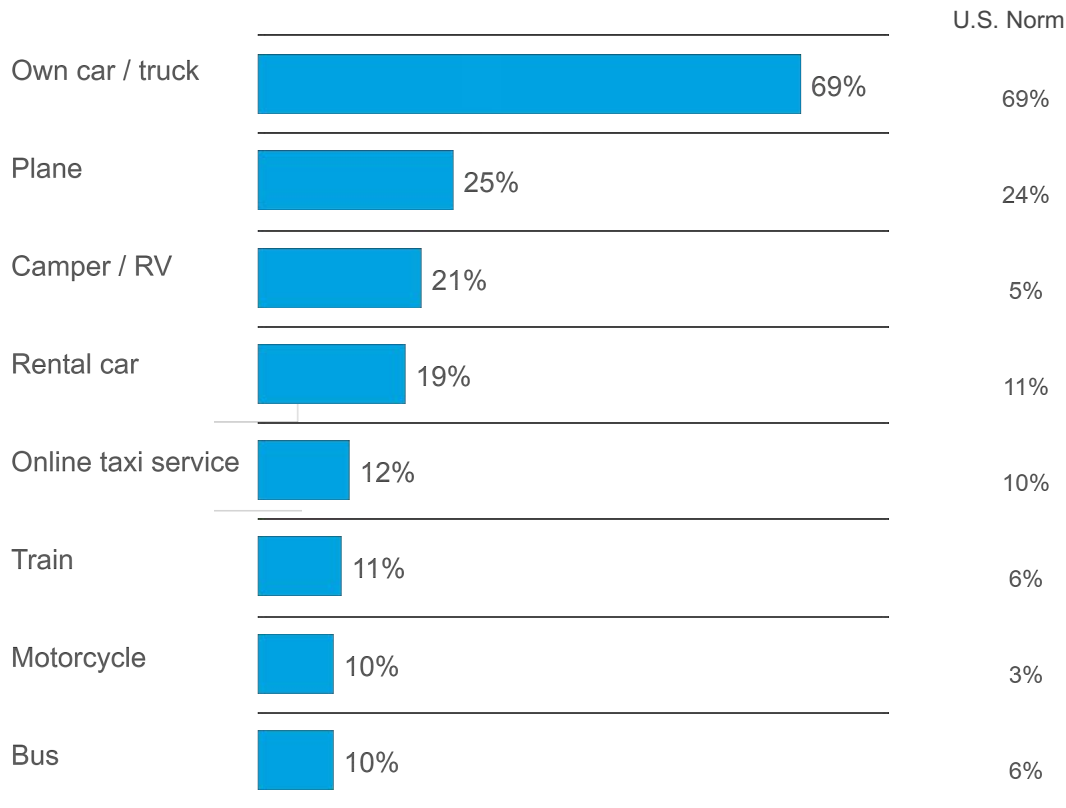
Travel Party Age

■ Central ■ U.S. Norm

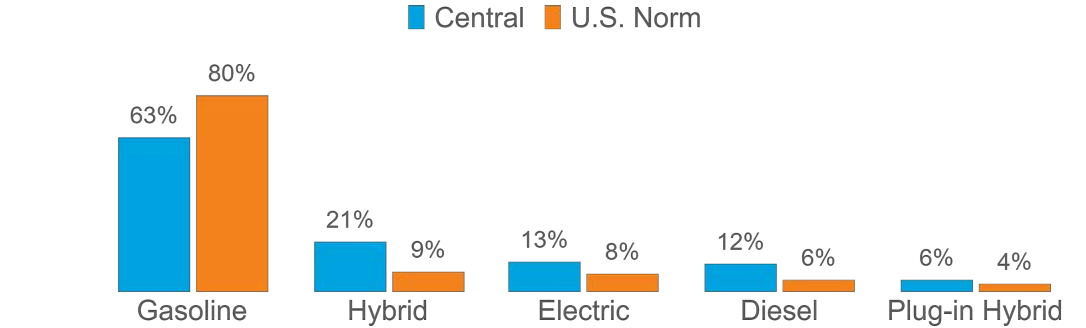


Question added in 2023, data is for 2023 only

Transportation Used to get to Destination

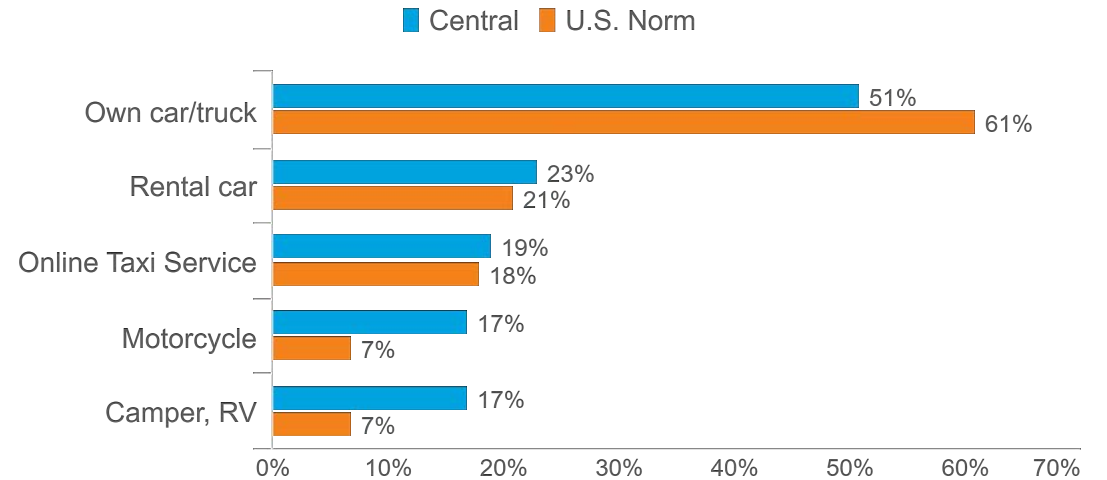


Type of Vehicle Used to get to Destination

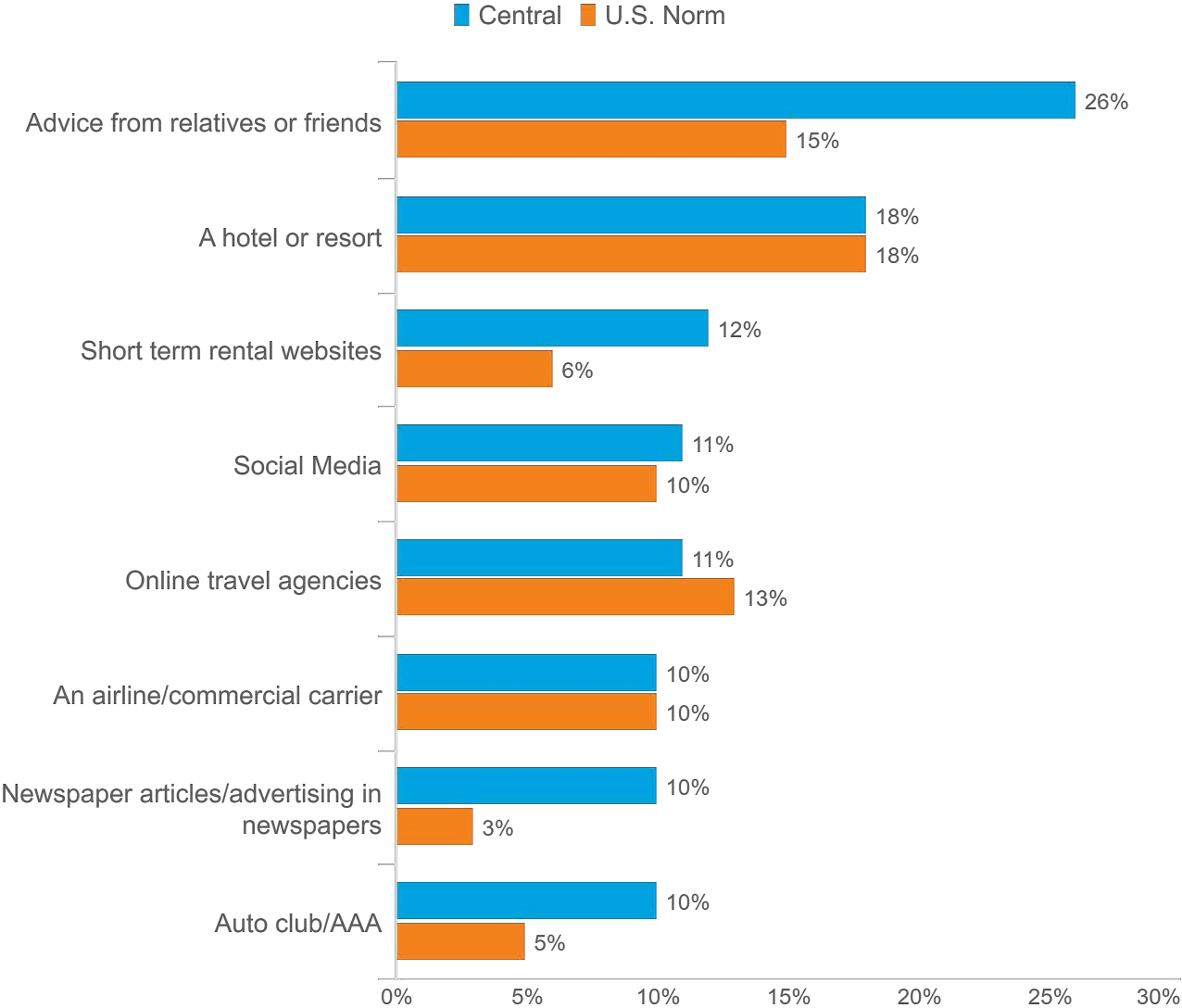


Question added in 2023, data is for 2023 only

Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

	Central	U.S. Norm
Did not plan anything in advance	11%	15%
More than 1 year in advance	4%	4%
6-12 months	13%	13%
3-5 months	26%	18%
2 months	15%	17%
1 month or less	31%	33%

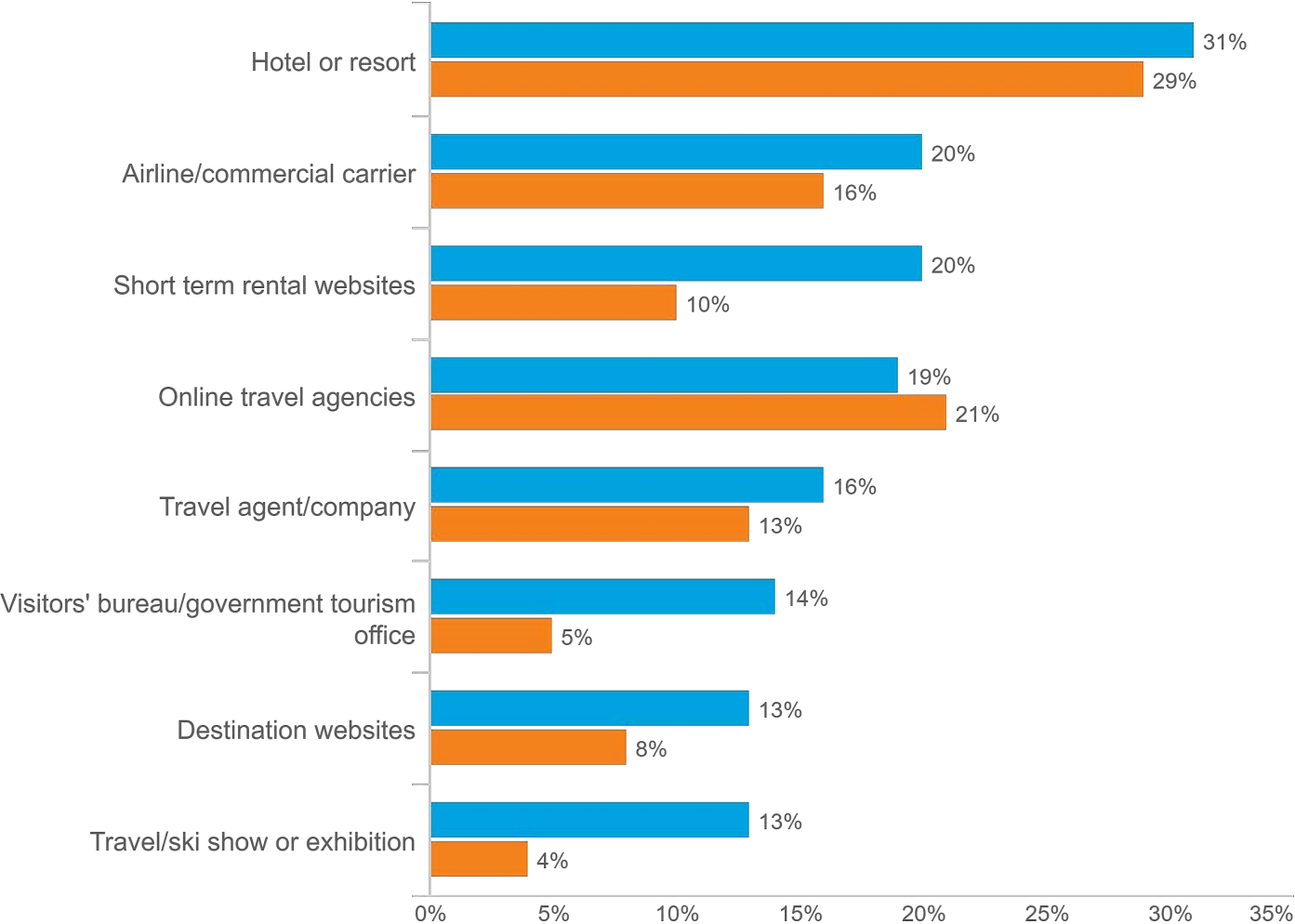


Central's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ Central ■ U.S. Norm



Accommodations

	Central	U.S. Norm
 Hotel	30%	42%
 Campground / RV park	24%	5%
 Home of friends / relatives	17%	22%
 Motel	13%	11%
 Bed & breakfast	13%	6%
 Rented home / condo / apartment	13%	7%
 Rented cottage / cabin	11%	4%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)

	Central	U.S. Norm
Sightseeing	23%	20%
Hiking/backpacking	21%	8%
Landmark/historic site	20%	13%
Camping	18%	5%
Attending celebration	18%	15%
National/state park	17%	8%
Shopping	16%	26%
Local parks/playgrounds	15%	10%
Nature tours/wildlife viewing/birding	14%	8%
Museum	14%	11%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Central	U.S. Norm
 Shopping at locally owned businesses	72%	48%
 Souvenir shopping	62%	38%
 Convenience/grocery shopping	42%	42%
 Antiquing	36%	12%
 Big box stores (Walmart, Costco)	34%	30%
 Farmers market	23%	17%
 Outlet/mall shopping	19%	44%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

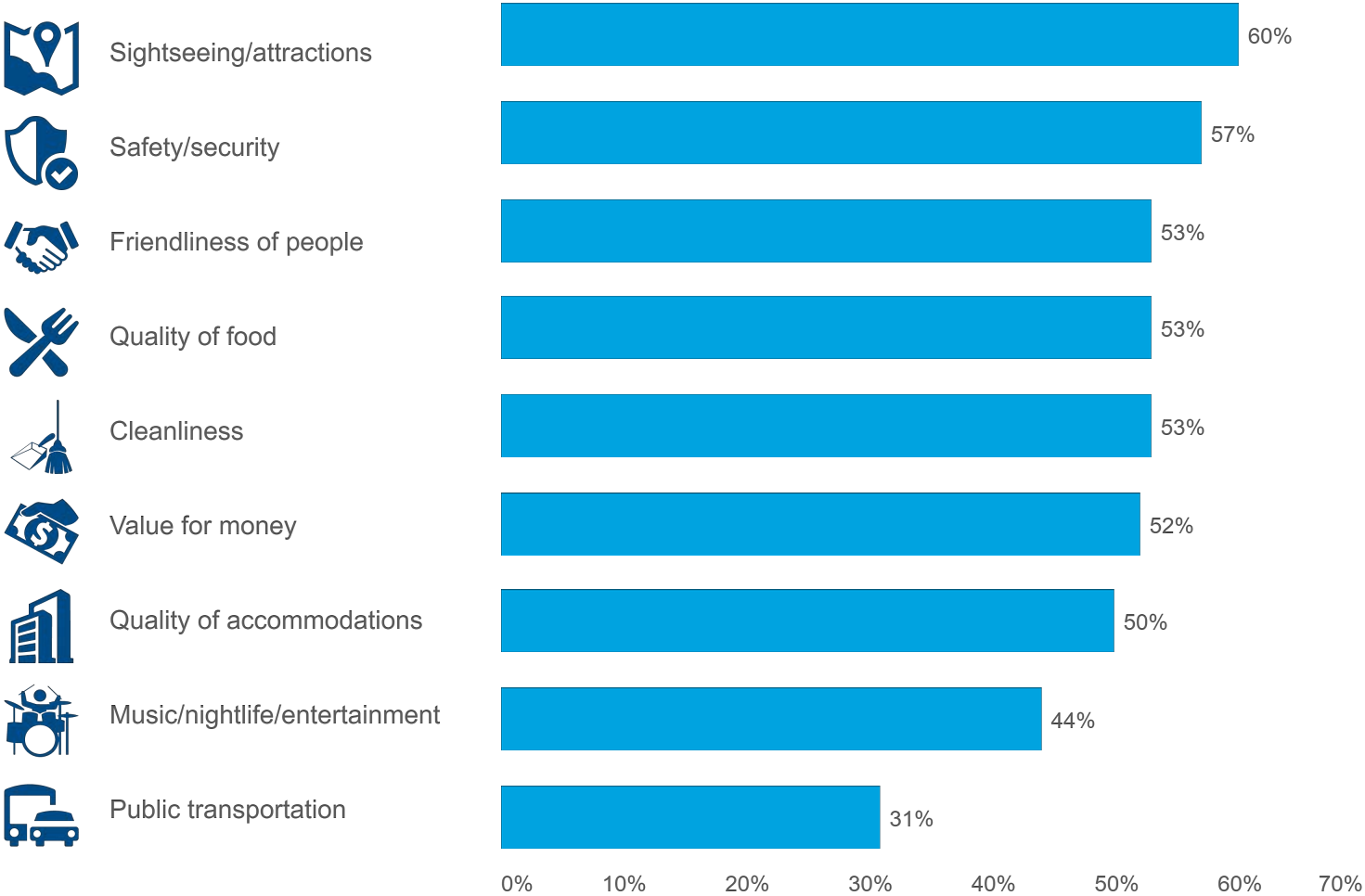
	Central	U.S. Norm
 Picnicking	44%	11%
 Casual dining	42%	56%
 Fast food	37%	45%
 Unique/local food	35%	30%
 Carry-out/food delivery service	19%	22%
 Fine/upscale dining	18%	19%

Question updated in 2023, data is for 2023 only



74%
of overnight travelers were
very satisfied with their overall
trip experience

% Very Satisfied with Trip



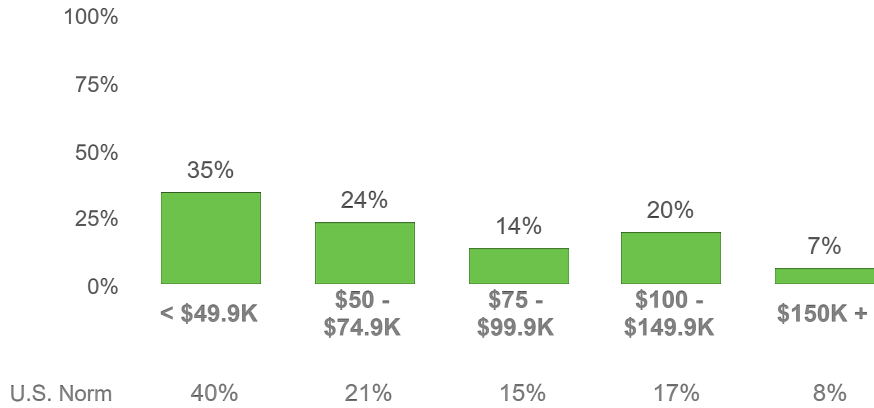
*Very Satisfied = selected top box on a five point scale



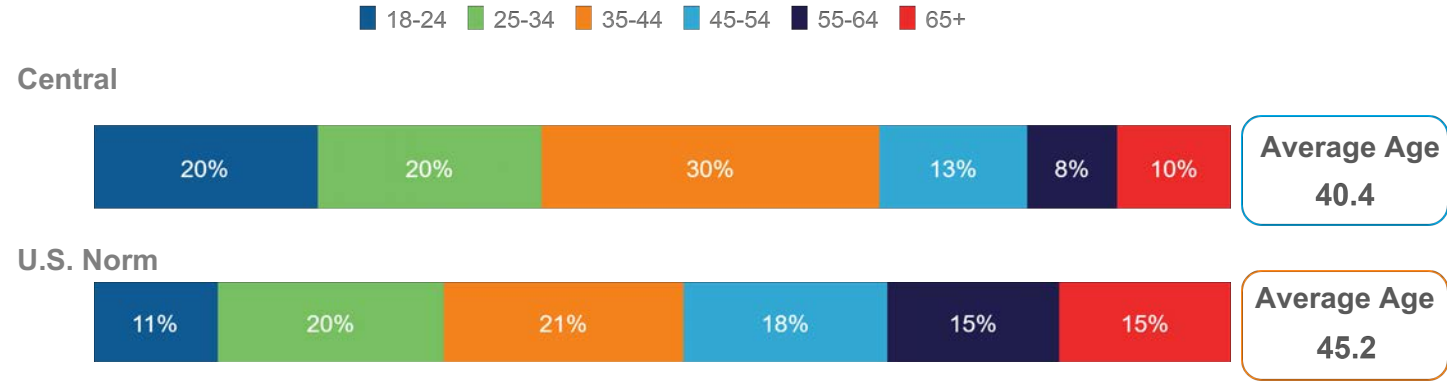
Demographic Profile of Overnight Central Visitors

Base: 2022/2023 Overnight Person-Trips

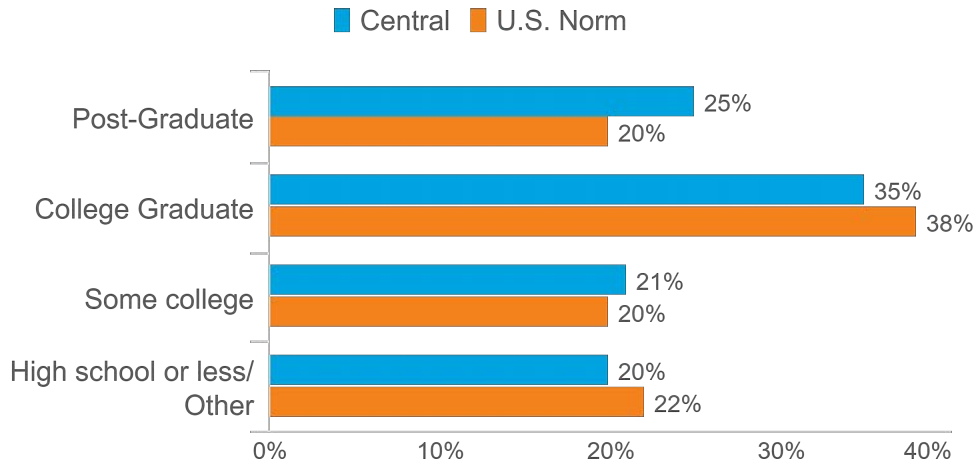
Household Income



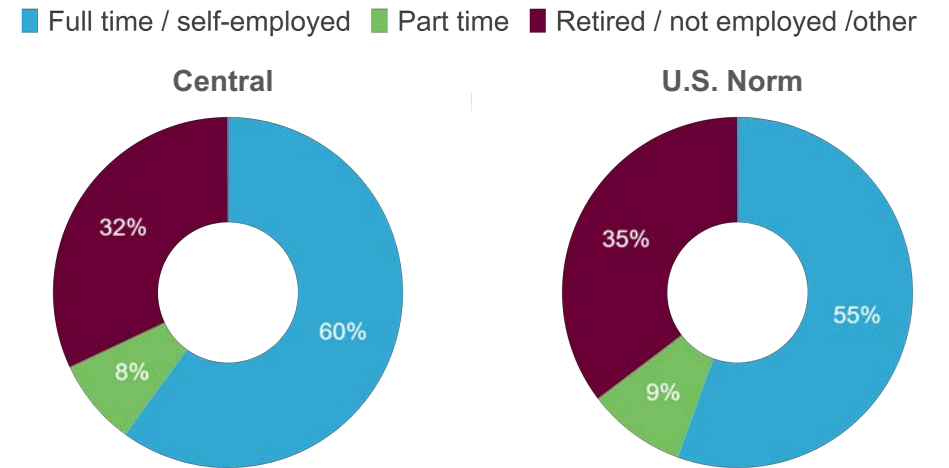
Age



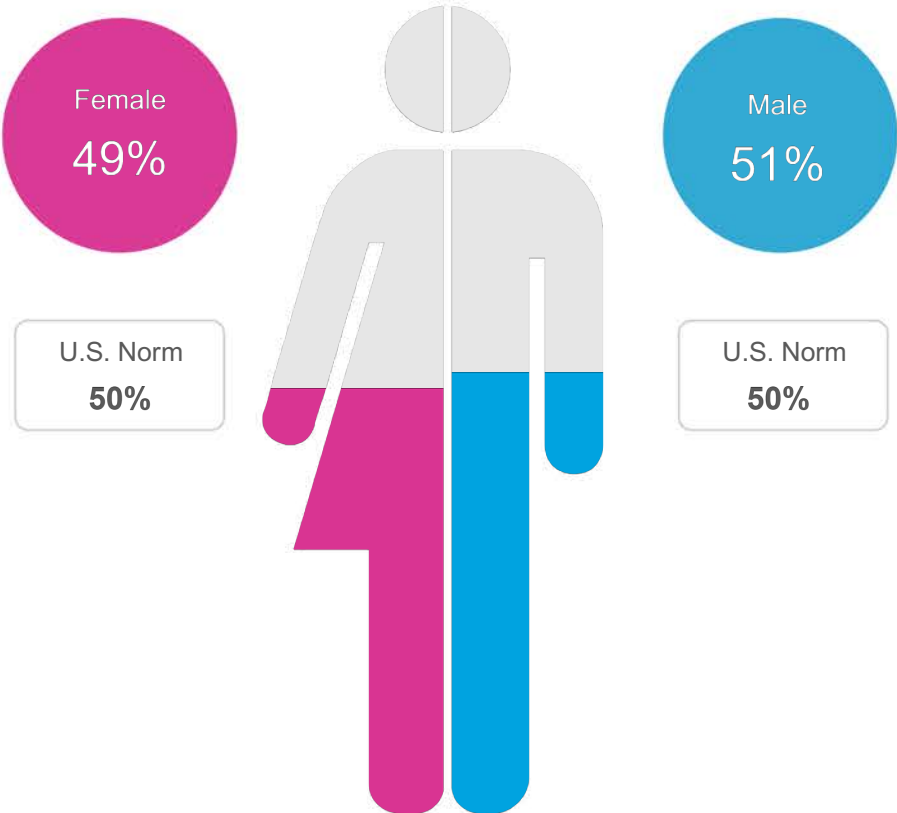
Educational Attainment



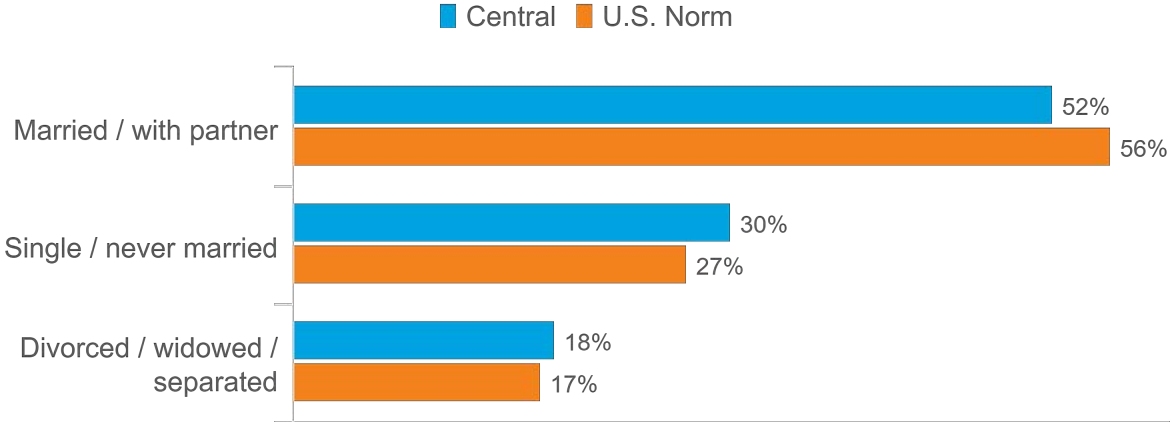
Employment



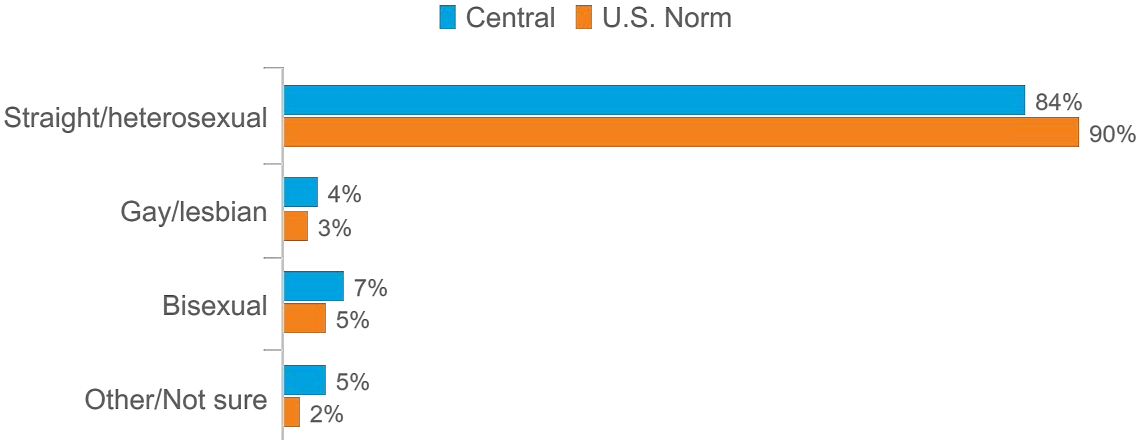
Gender



Marital Status

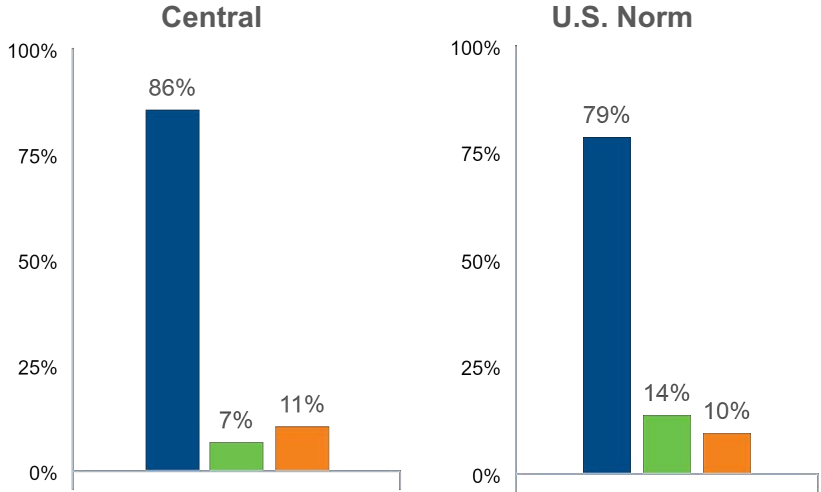


Sexual Orientation



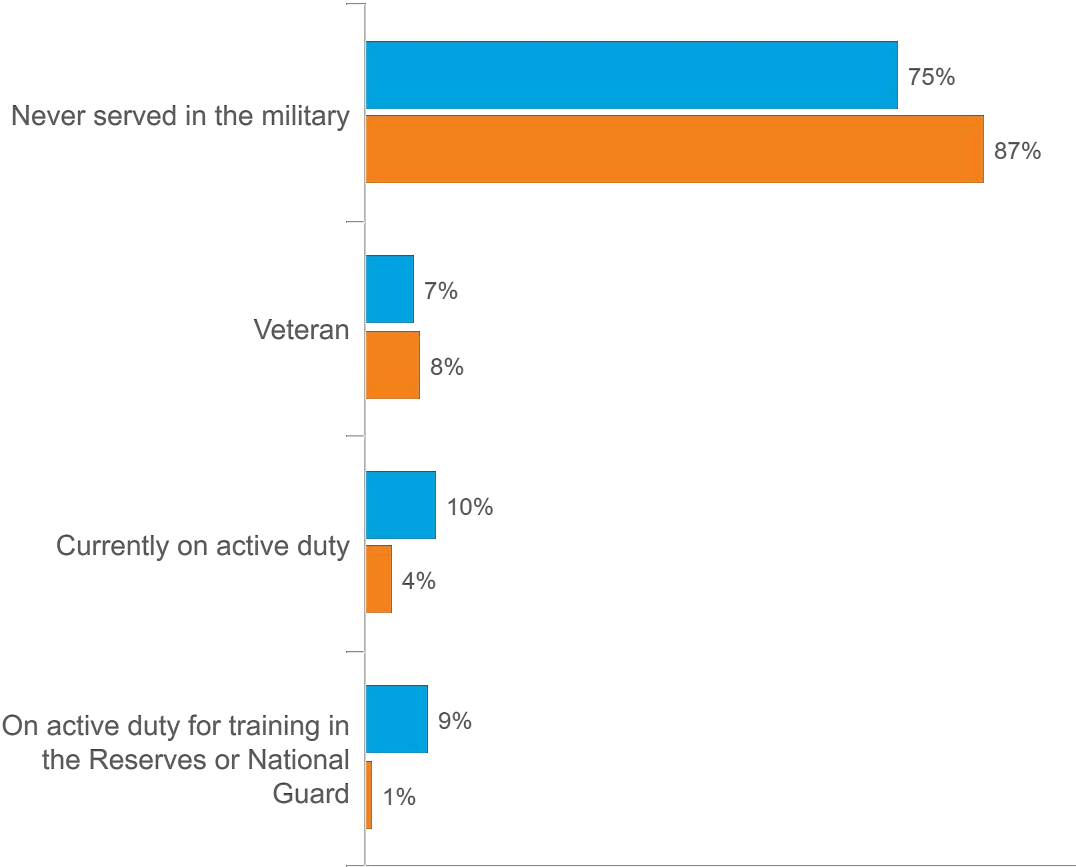
Race

White African-American Other



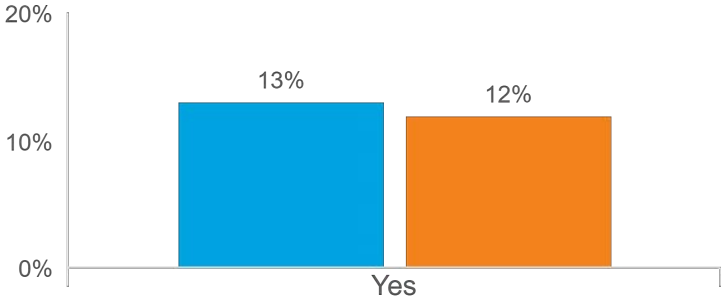
Military Status

Central U.S. Norm

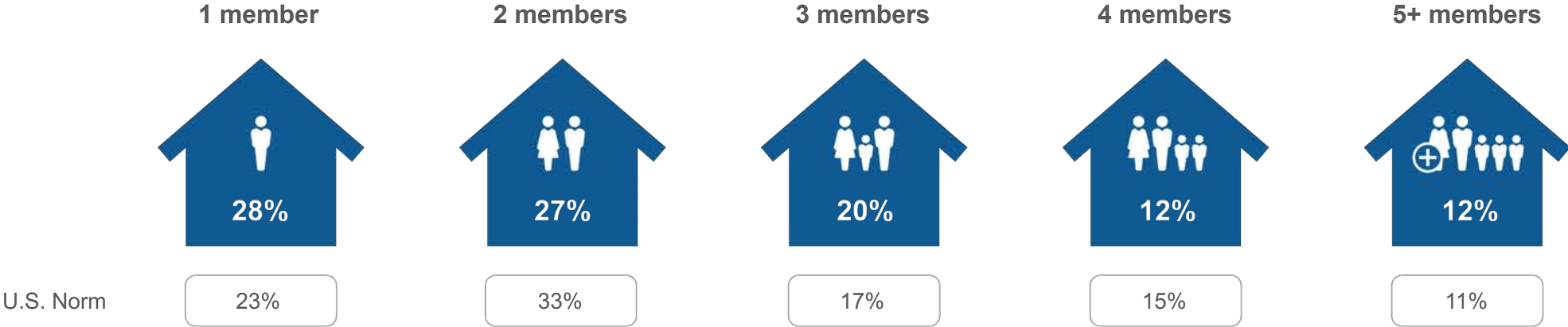


Hispanic Background

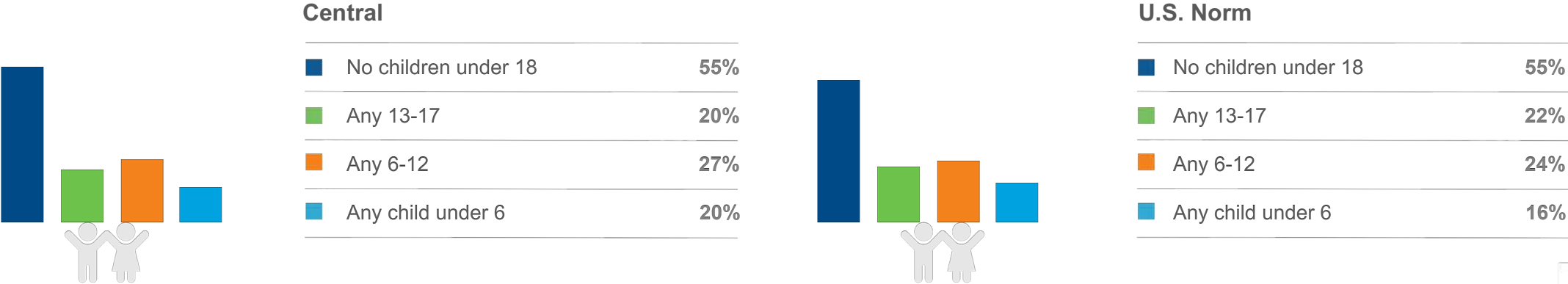
Central U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: Eastern Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Eastern, the following sample was achieved in 2022/2023:



Overnight Base Size

270

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

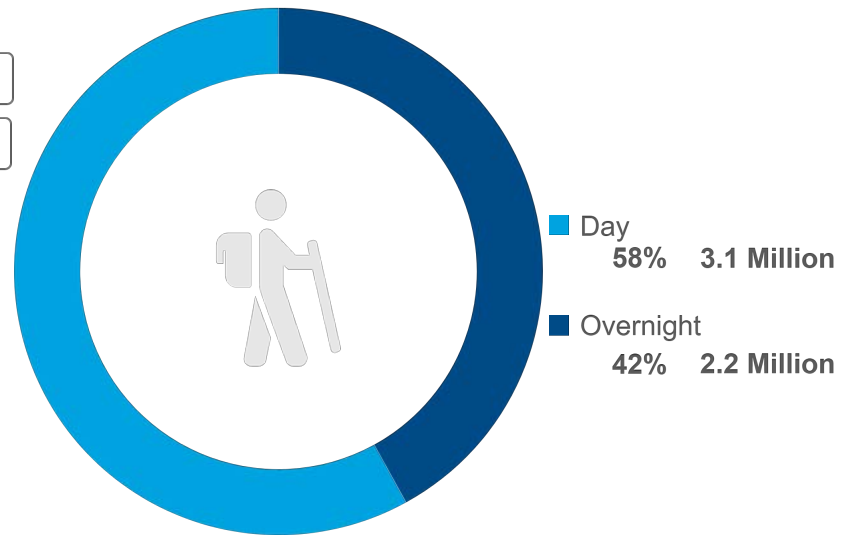
Total Size of Eastern 2023 Domestic Travel Market

Total Person-Trips

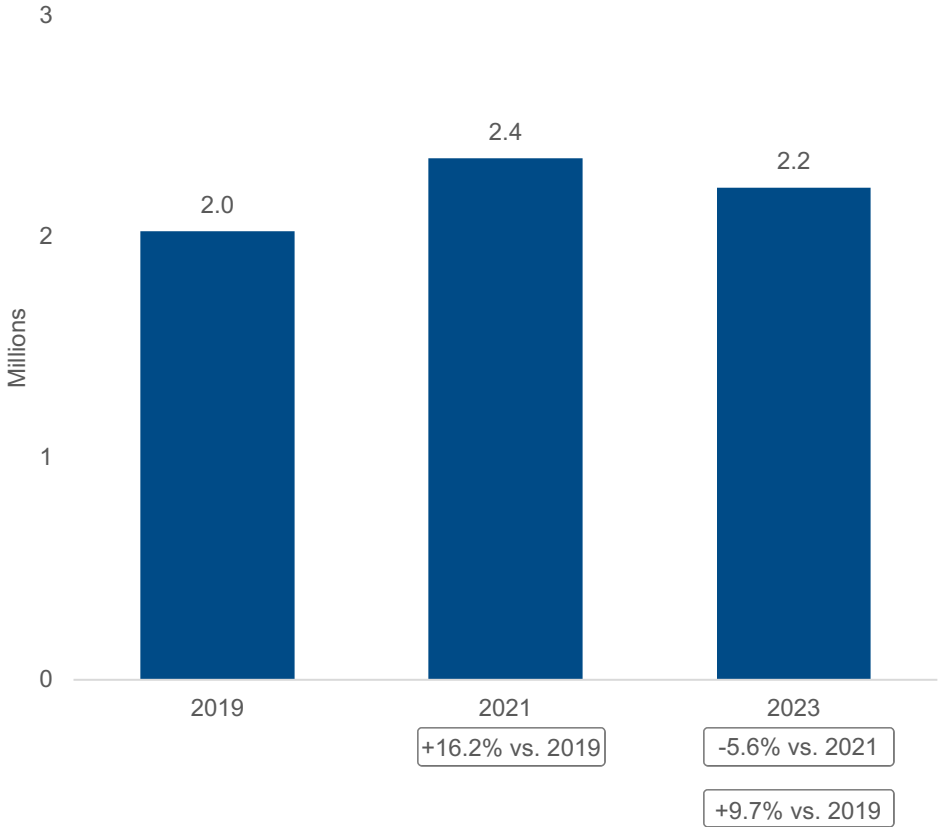
5.3 Million

+1.2% vs. 2021

+23.3% vs. 2019



Overnight Trips to Eastern



Past Visitation to Eastern

Base: 2022/2023 Overnight Person-Trips











81% of overnight travelers to Eastern are repeat visitors

62% of overnight travelers to Eastern had visited before in the past 12 months

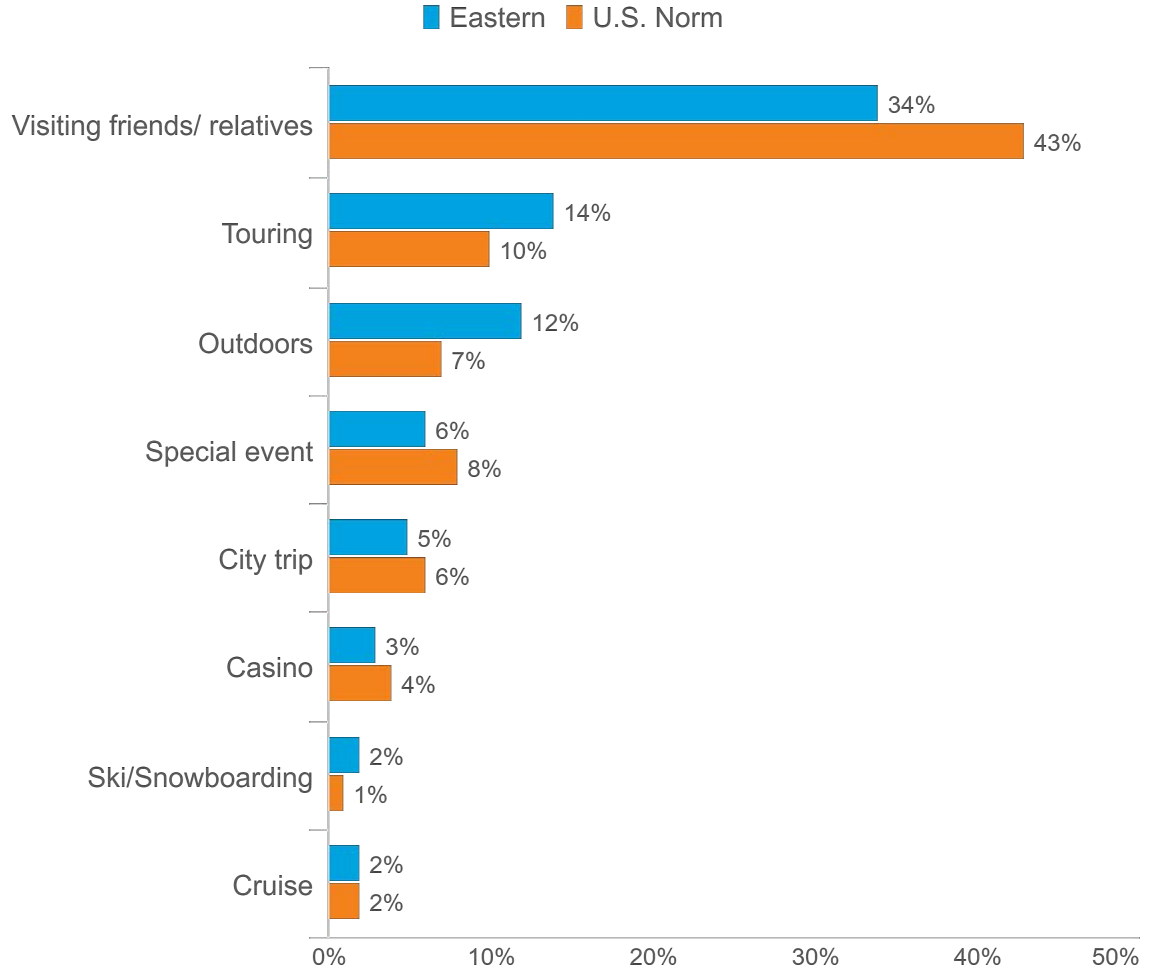
Eastern's Overnight Trip Characteristics

Base: 2022/2023 Overnight Person-Trips

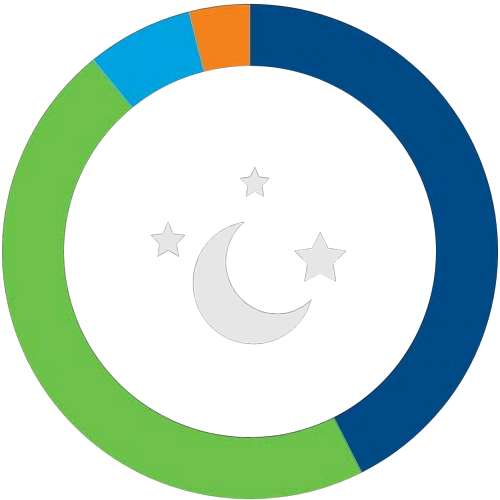
Main Purpose of Trip

 34% Visiting friends/ relatives	
 14% Touring	 4% Conference/ Convention
 12% Outdoors	
 6% Special event	
 5% City trip	 14% Other business trip
 3% Casino	
 2% Ski/Snowboarding	 2% Business-Leisure
 2% Cruise	

Main Purpose of Leisure Trip



2023 U.S. Overnight Trips



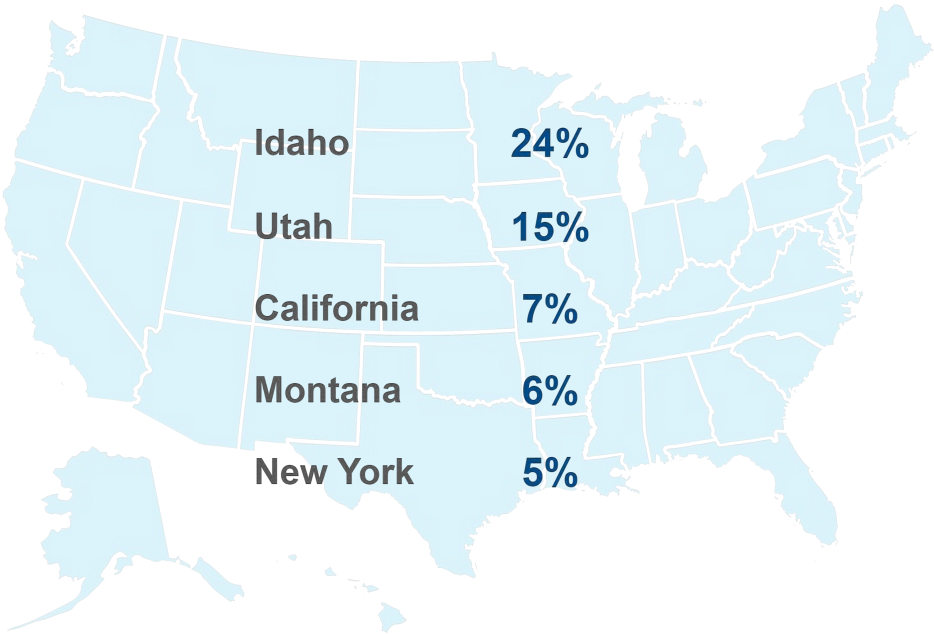
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

Eastern Overnight Trips

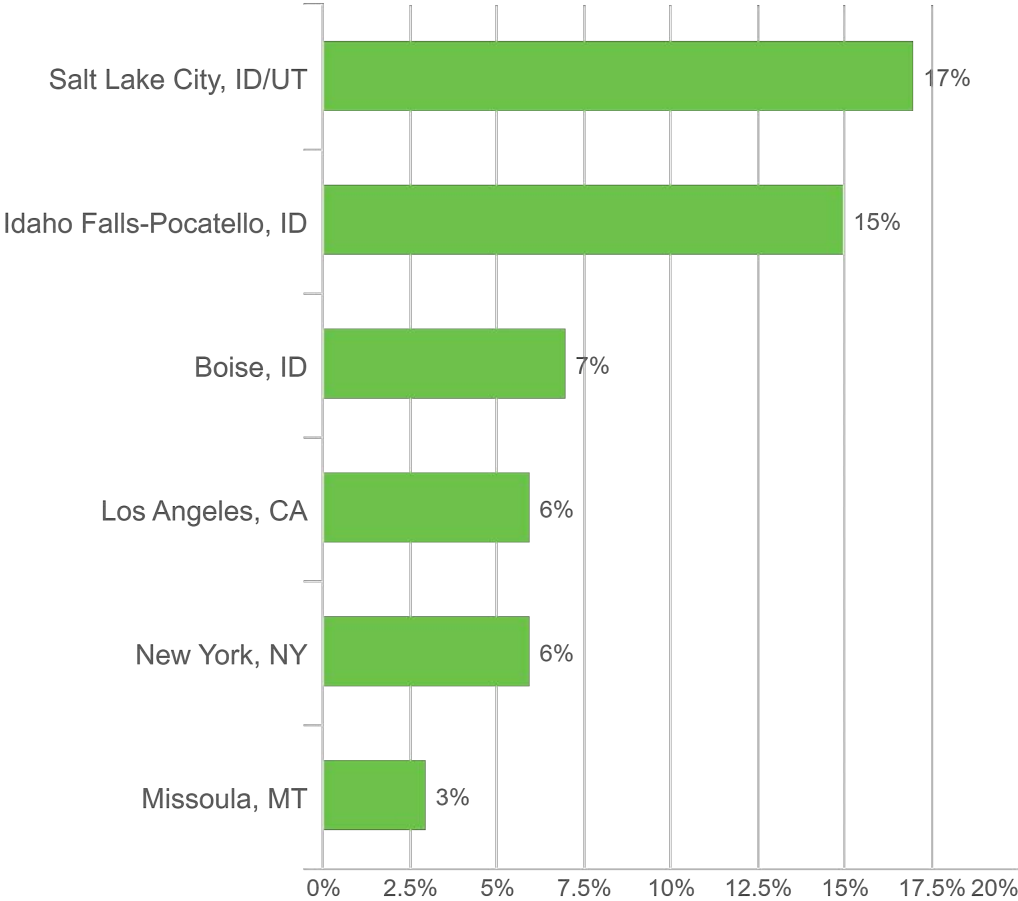


■ Visiting friends/relatives	34%
■ Marketable	47%
■ Business	17%
■ Business-leisure	2%

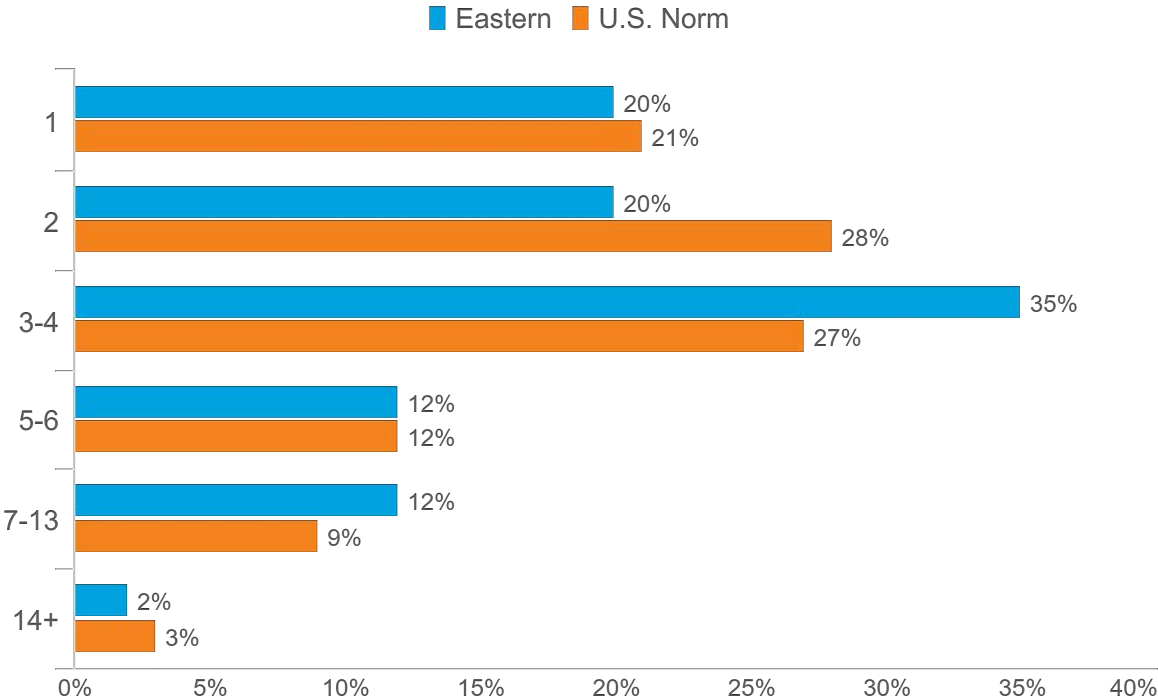
State Origin Of Trip



DMA Origin Of Trip



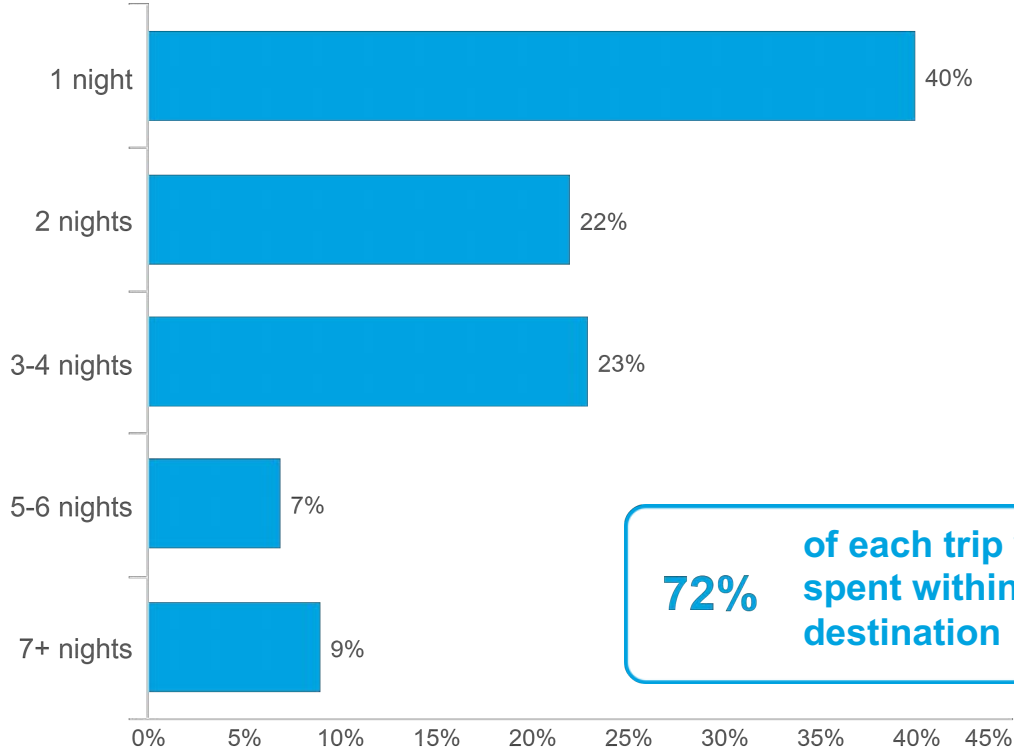
Total Nights Away on Trip



Eastern
3.7
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Eastern



72% of each trip was spent within the destination

Average number of nights
2.7

Size of Travel Party

■ Adults ■ Children

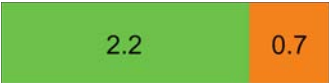
Eastern



Average number of people

Total
3.2

U.S. Norm



Average number of people

Total
2.9

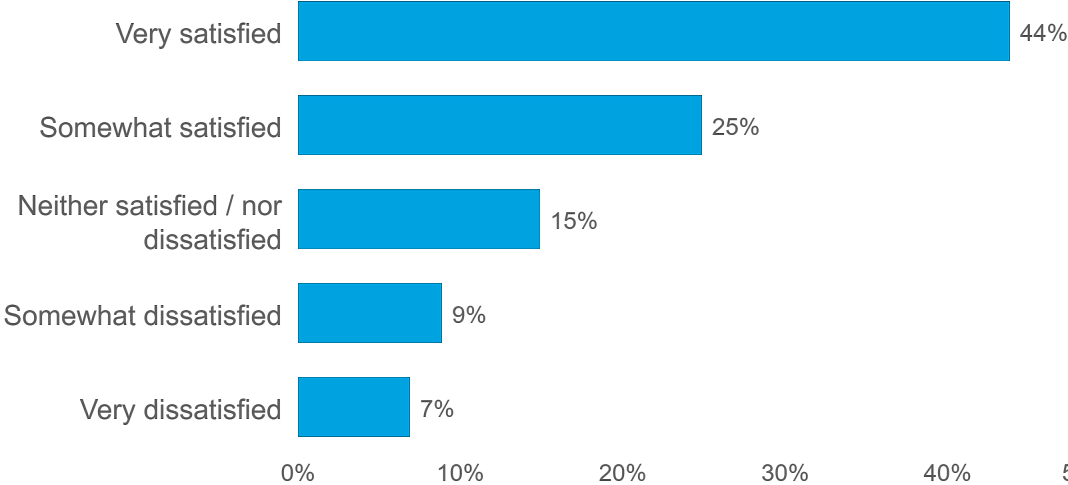


27% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



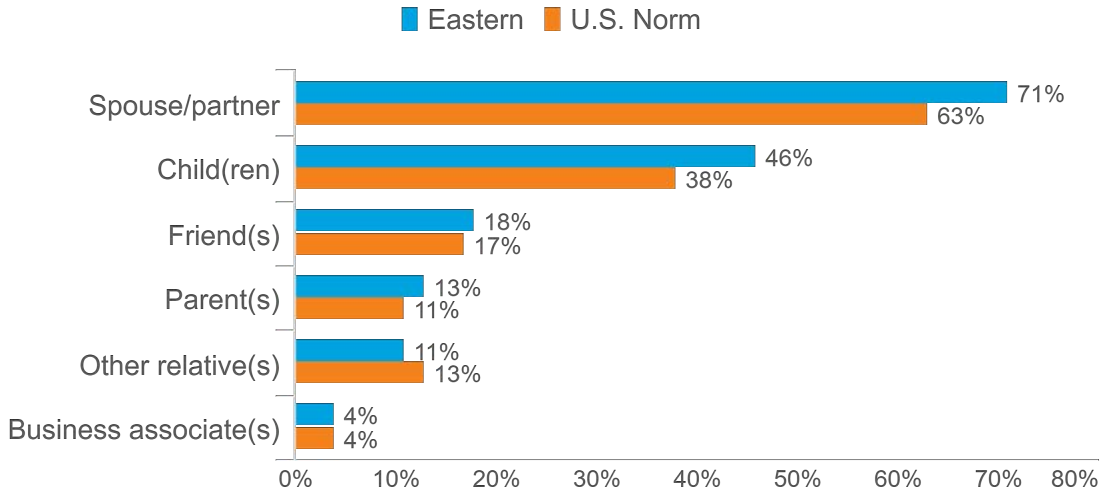


22% of trips only had one person in the travel party

U.S. Norm: **24%**

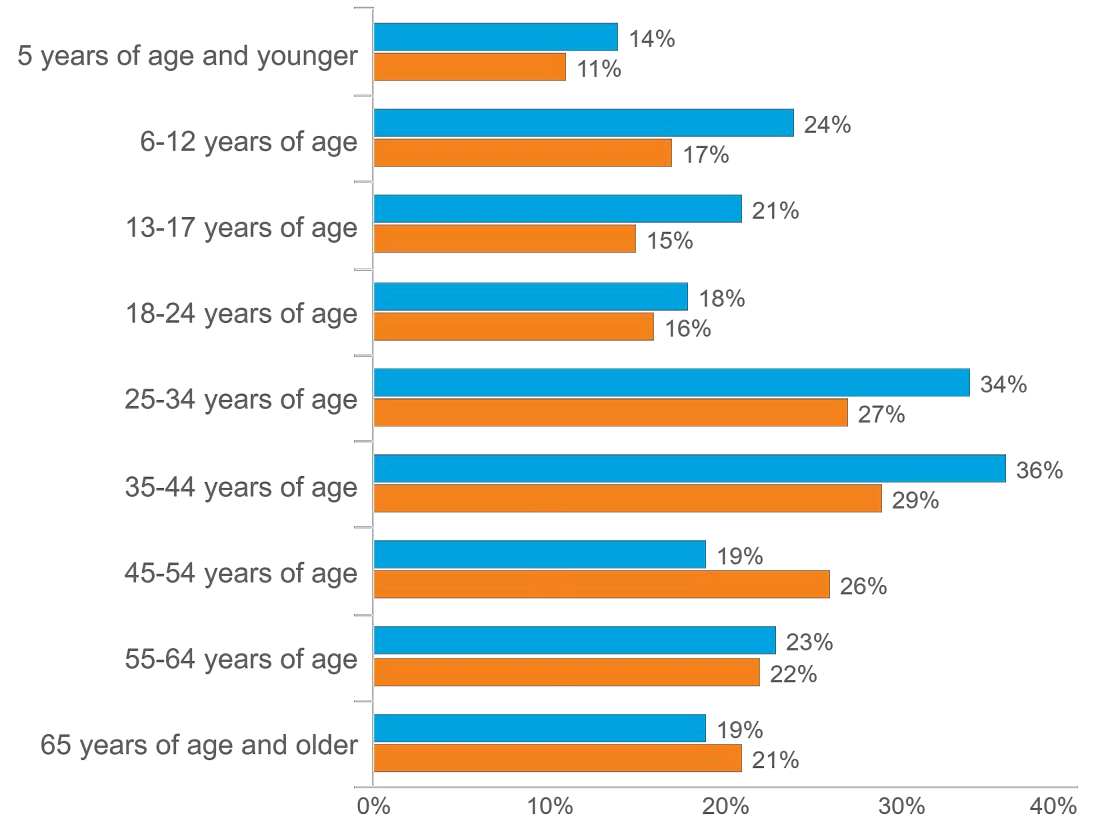
Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



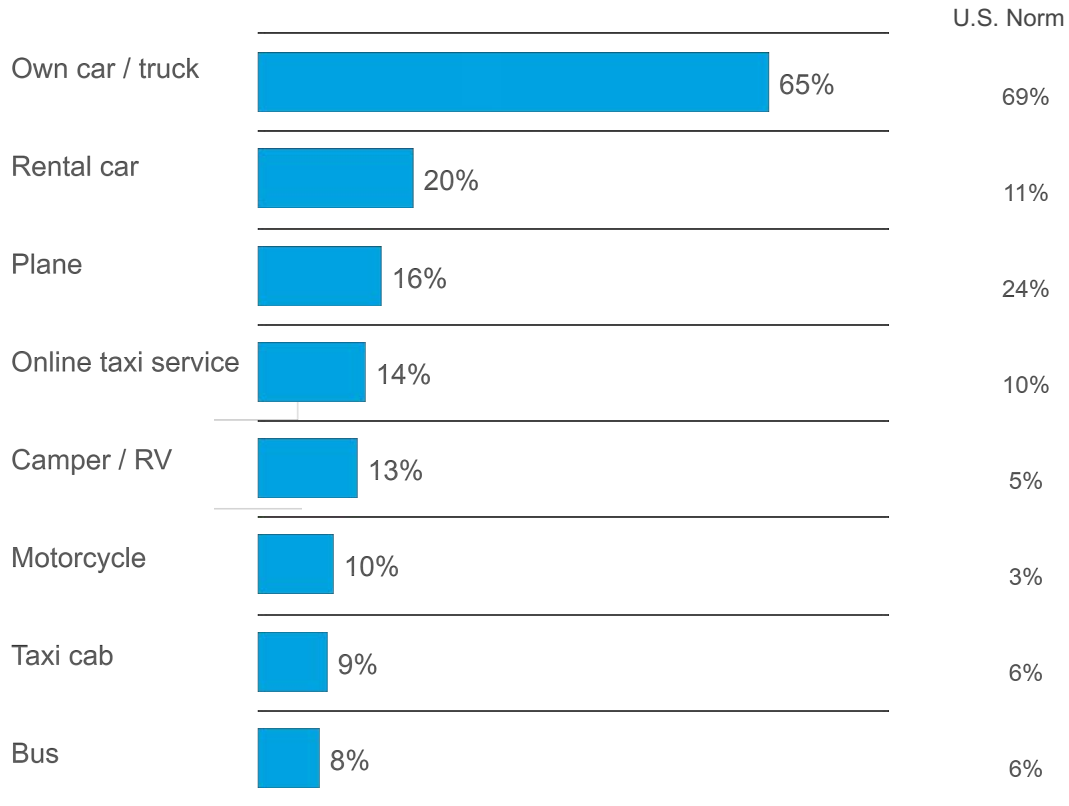
Travel Party Age

■ Eastern ■ U.S. Norm

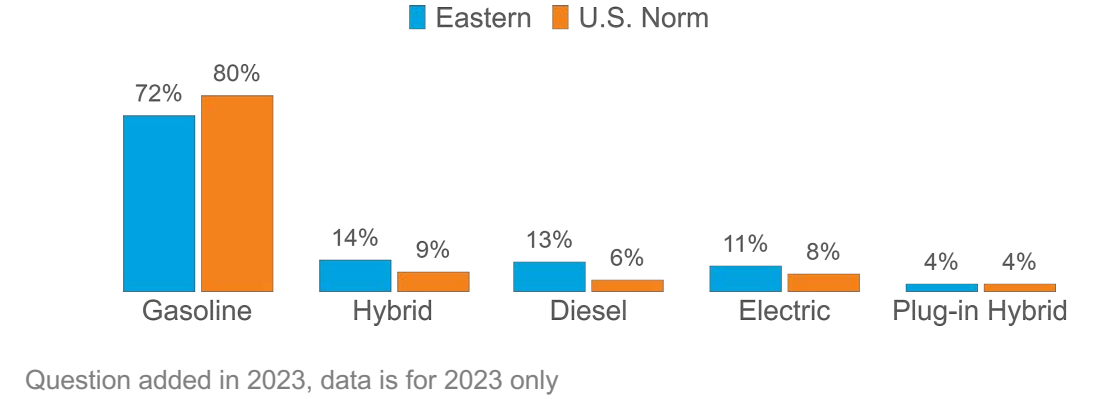


Question added in 2023, data is for 2023 only

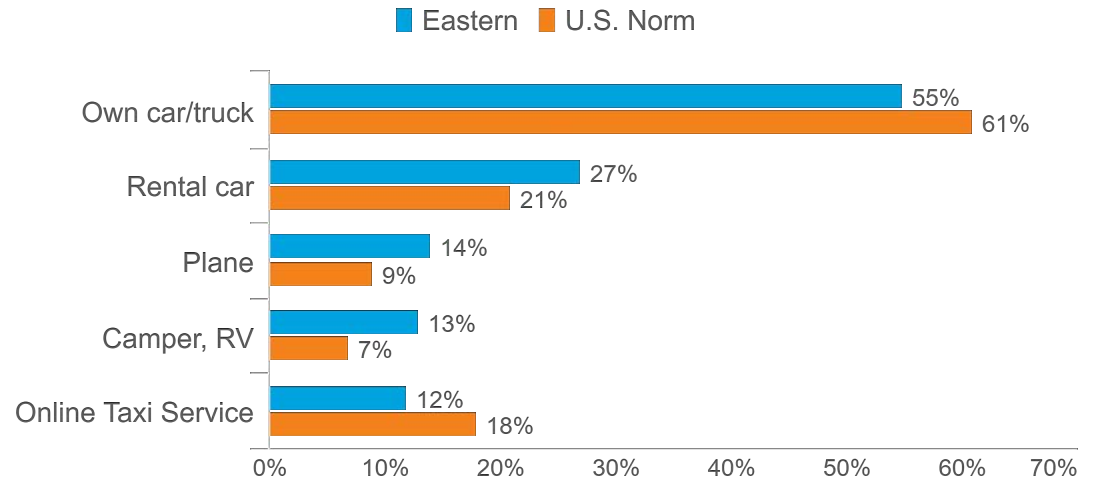
Transportation Used to get to Destination



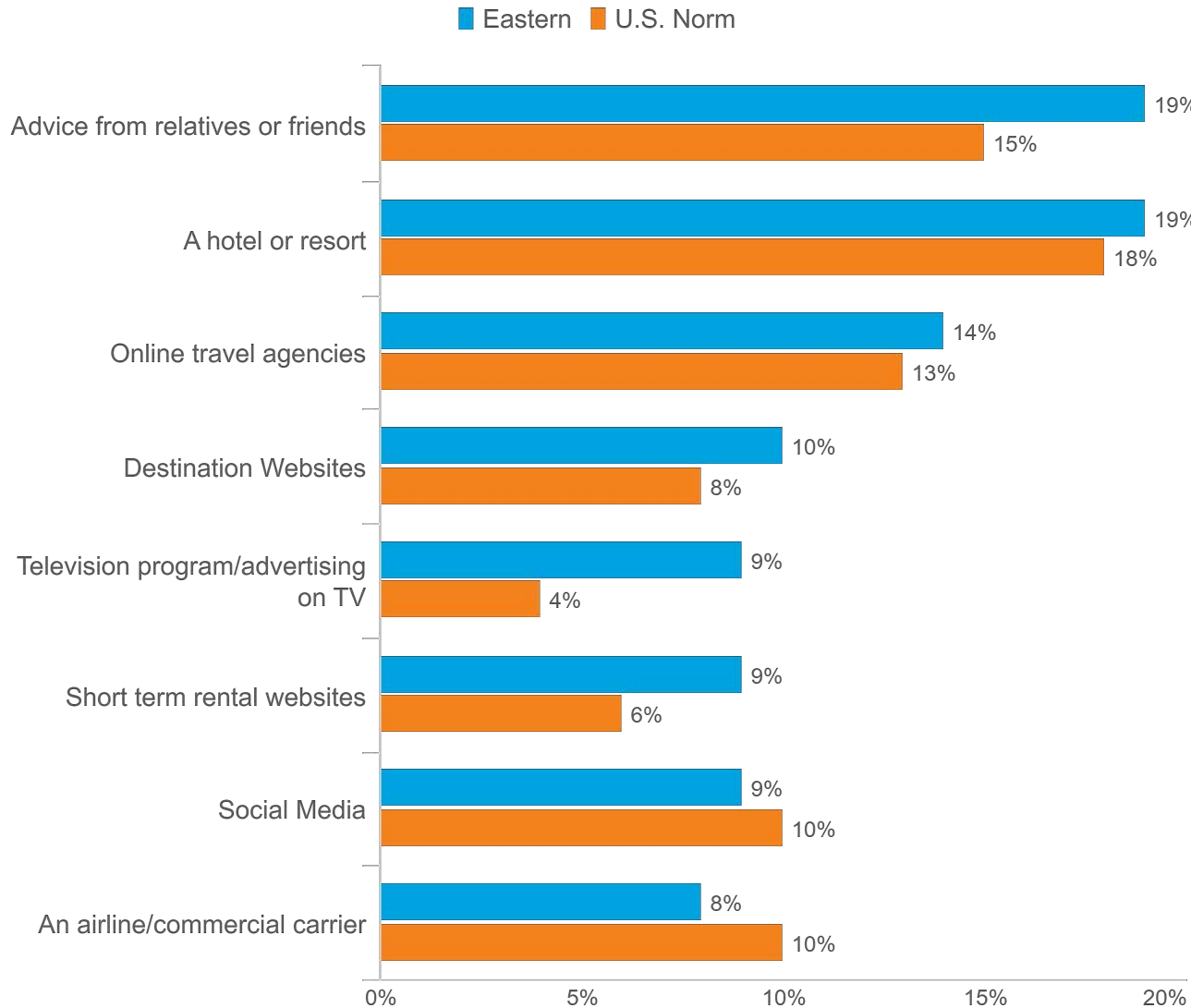
Type of Vehicle Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

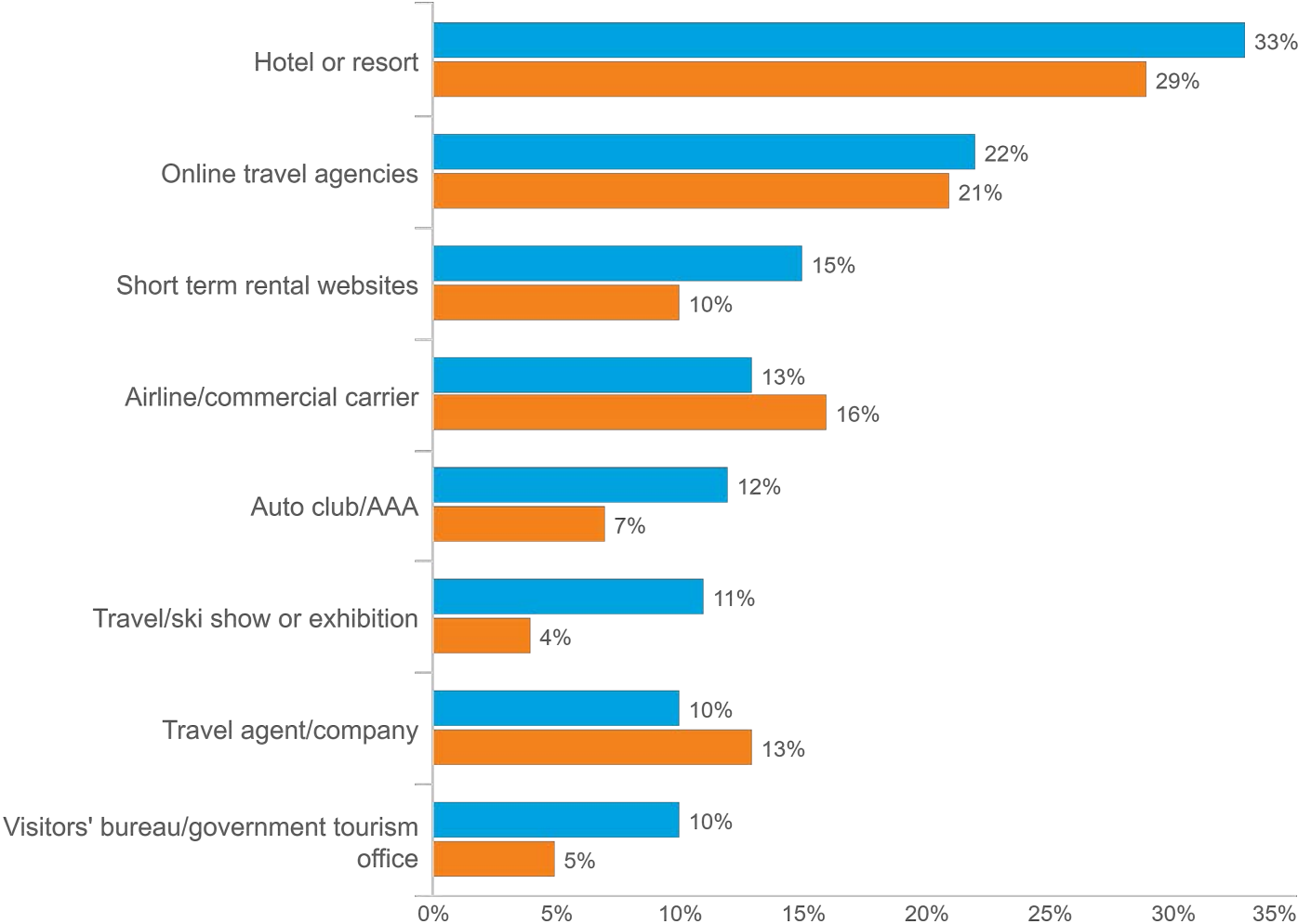
	Eastern	U.S. Norm
Did not plan anything in advance	12%	15%
More than 1 year in advance	2%	4%
6-12 months	14%	13%
3-5 months	18%	18%
2 months	19%	17%
1 month or less	35%	33%

Eastern's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ Eastern ■ U.S. Norm



Accommodations

	Eastern	U.S. Norm
 Hotel	42%	42%
 Campground / RV park	17%	5%
 Home of friends / relatives	17%	22%
 Motel	14%	11%
 Rented cottage / cabin	10%	4%
 Country inn / lodge	10%	3%
 Rented home / condo / apartment	6%	7%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)

	Eastern	U.S. Norm
Attending celebration	21%	15%
Shopping	19%	26%
Sightseeing	18%	20%
Hiking/backpacking	15%	8%
Nature tours/wildlife viewing/birding	14%	8%
Landmark/historic site	14%	13%
National/state park	13%	8%
Convention for personal interest	13%	5%
Local parks/playgrounds	12%	10%
Business convention/conference	11%	7%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Eastern	U.S. Norm
 Big box stores (Walmart, Costco)	70%	30%
 Convenience/grocery shopping	58%	42%
 Shopping at locally owned businesses	51%	48%
 Outlet/mall shopping	36%	44%
 Souvenir shopping	30%	38%
 Farmers market	23%	17%
 Antiquing	15%	12%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

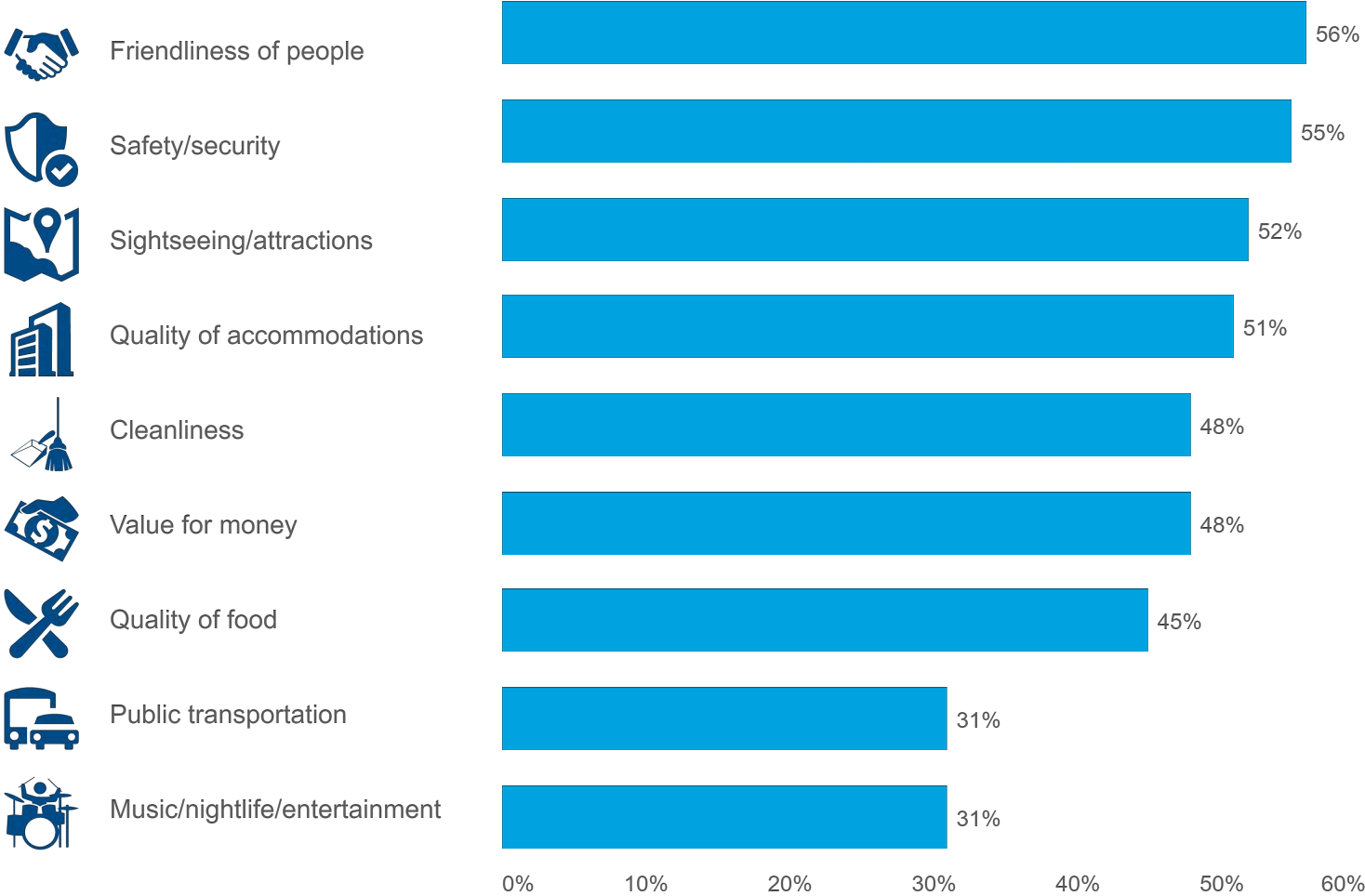
	Eastern	U.S. Norm
 Casual dining	57%	56%
 Fast food	50%	45%
 Unique/local food	31%	30%
 Carry-out/food delivery service	24%	22%
 Picnicking	22%	11%
 Fine/upscale dining	18%	19%

Question updated in 2023, data is for 2023 only



64%
of overnight travelers were
very satisfied with their overall
trip experience

% Very Satisfied with Trip



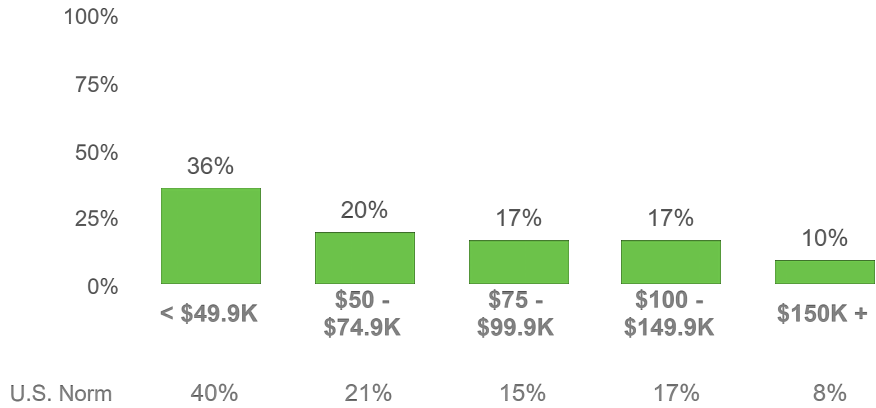
*Very Satisfied = selected top box on a five point scale



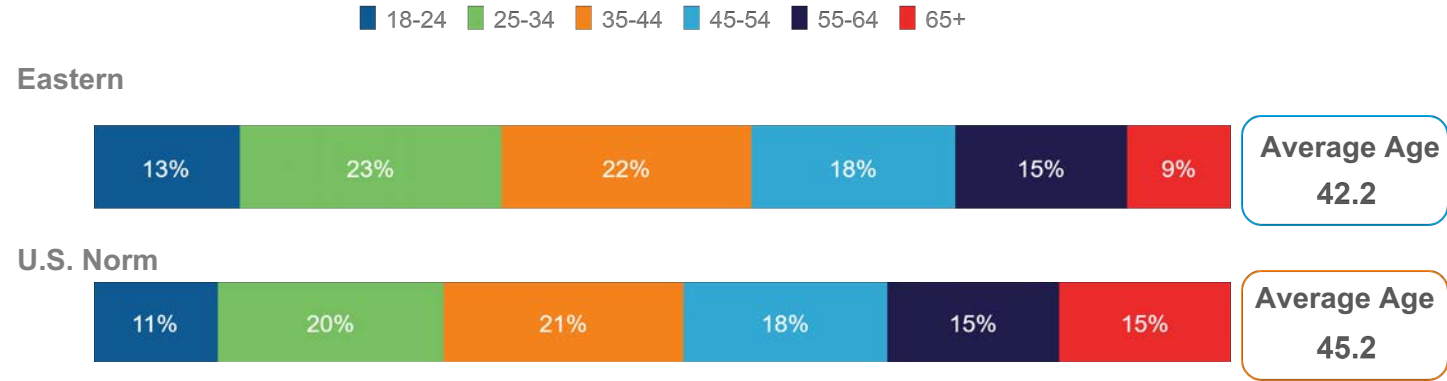
Demographic Profile of Overnight Eastern Visitors

Base: 2022/2023 Overnight Person-Trips

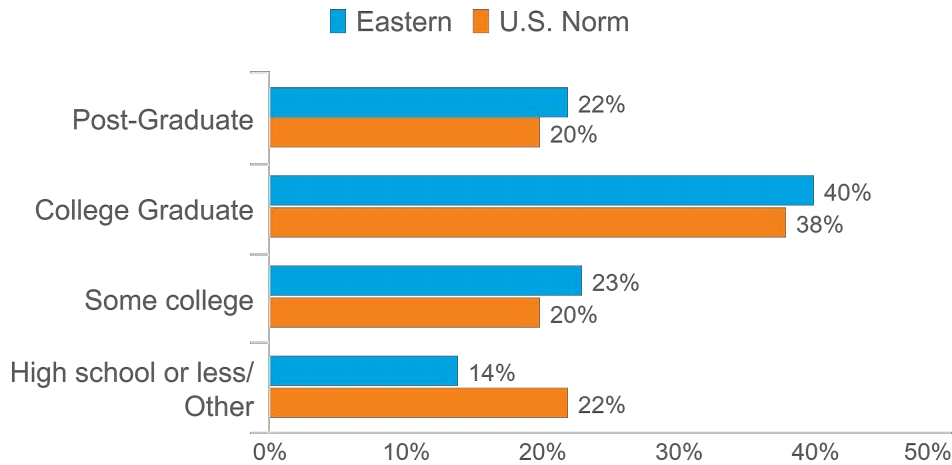
Household Income



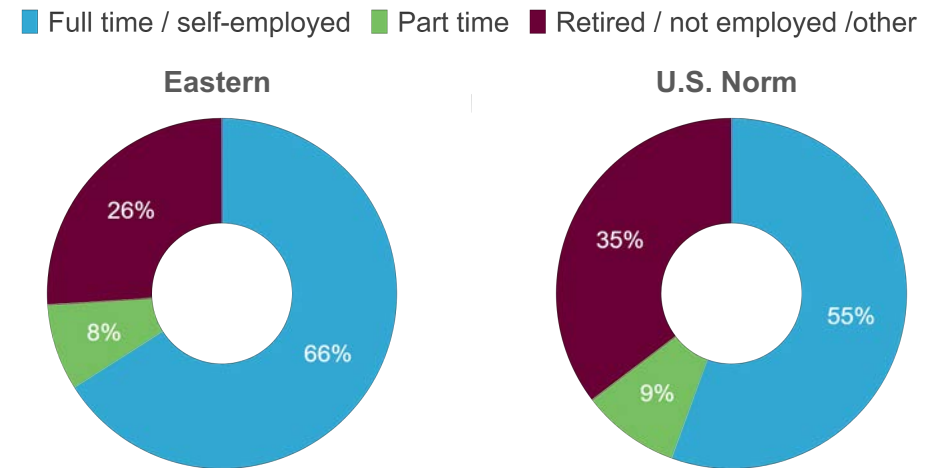
Age



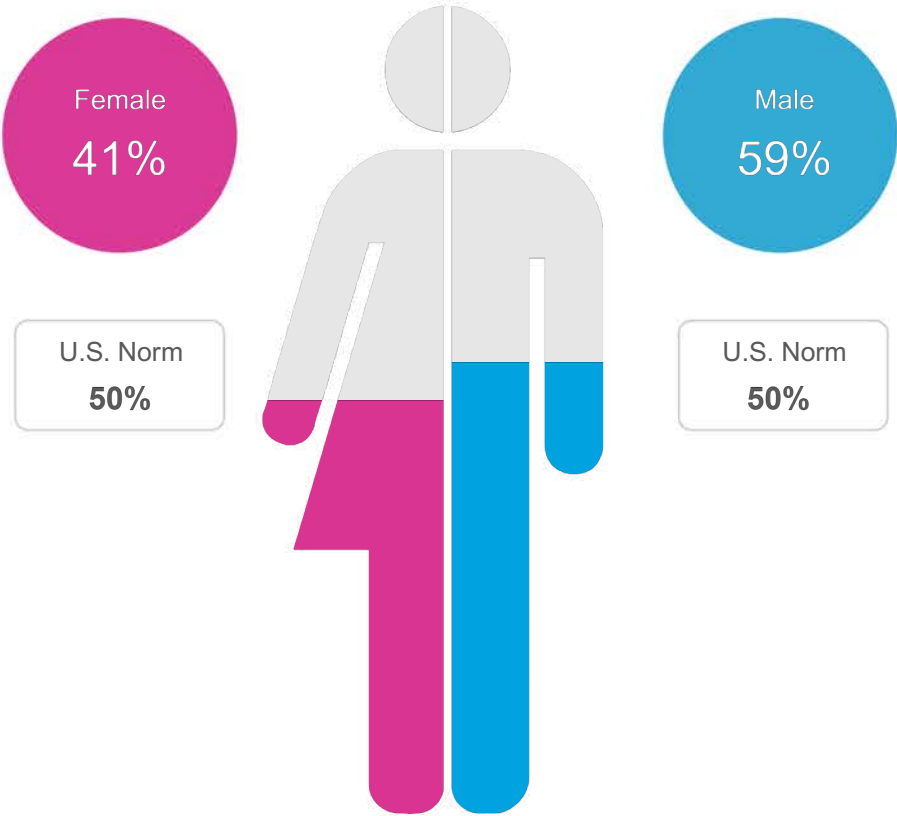
Educational Attainment



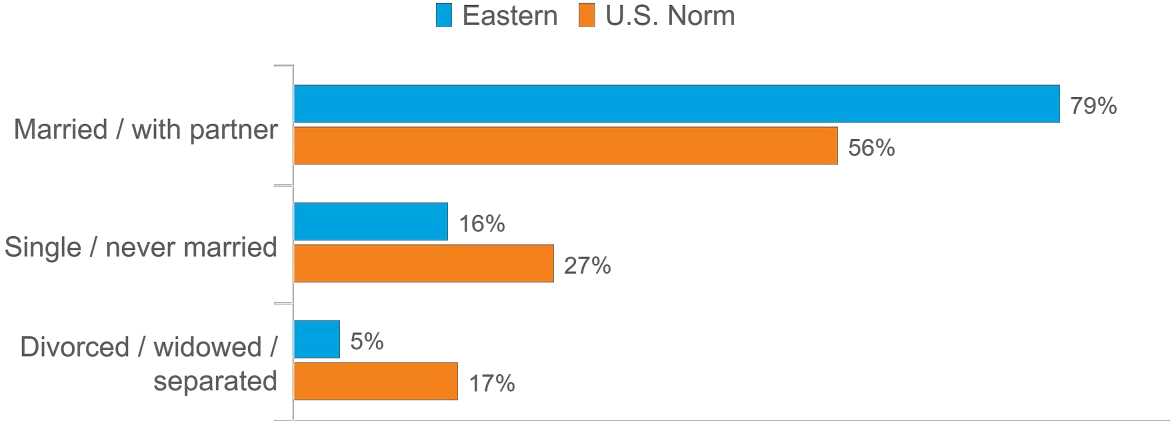
Employment



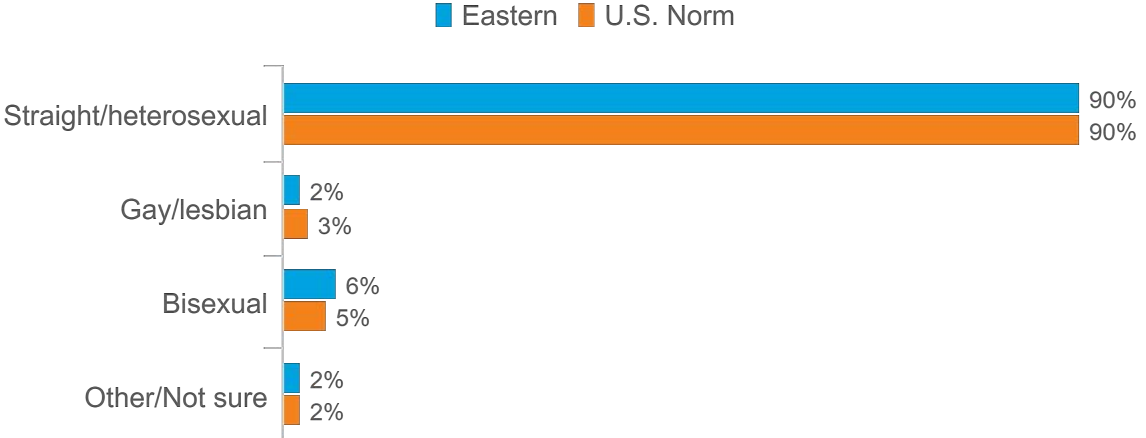
Gender



Marital Status

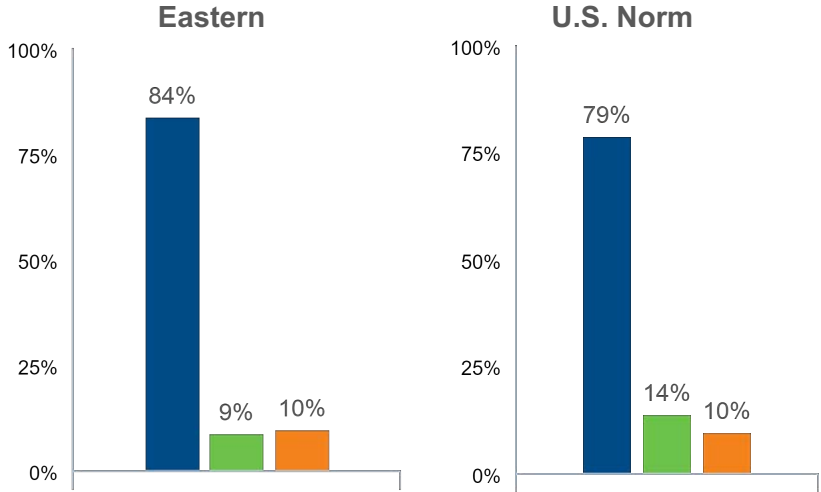


Sexual Orientation



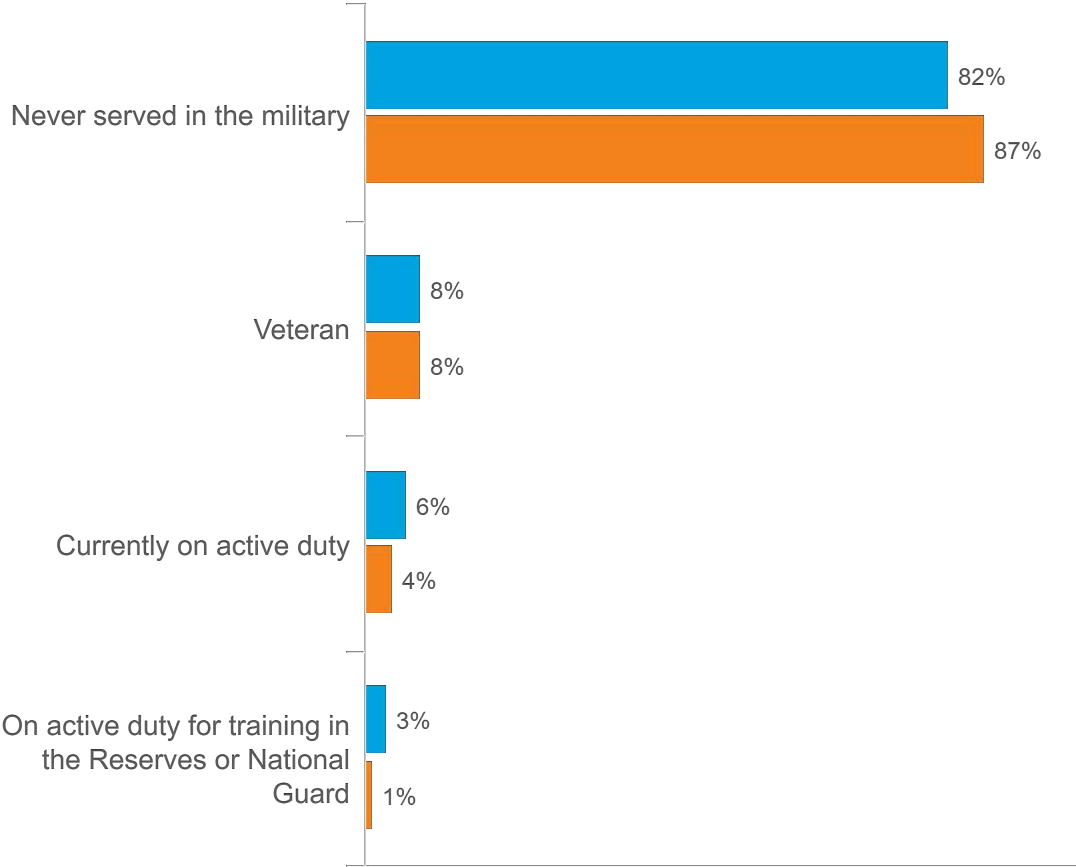
Race

White African-American Other



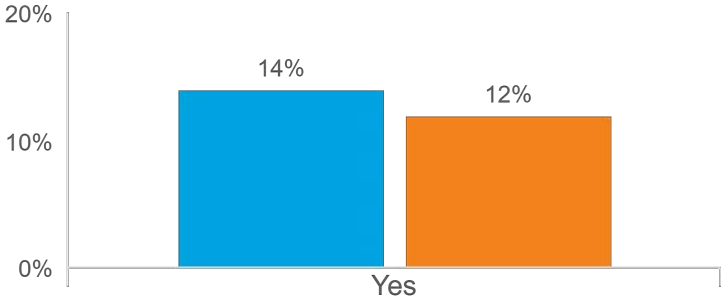
Military Status

Eastern U.S. Norm

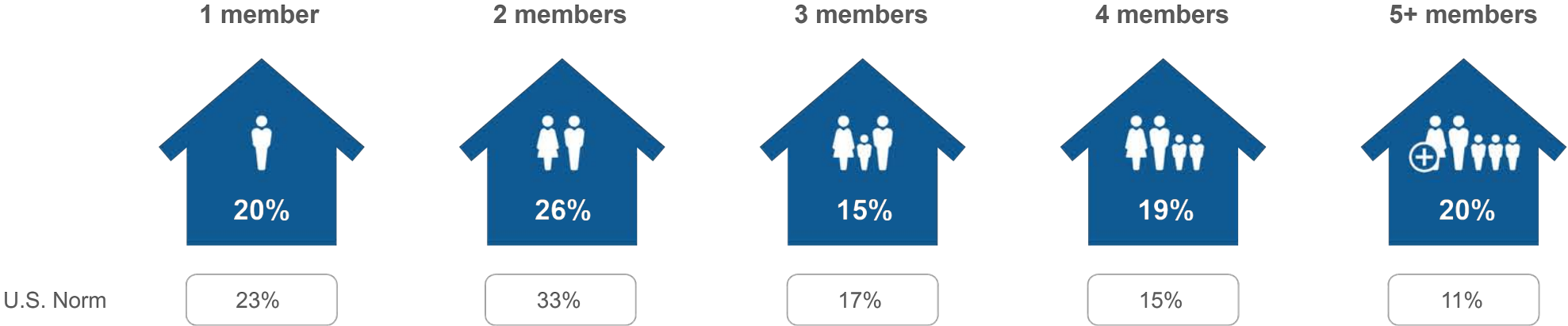


Hispanic Background

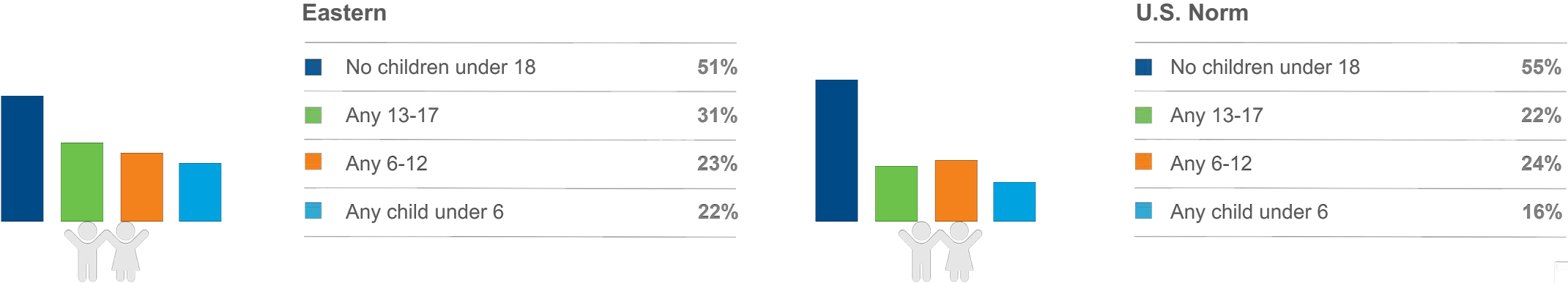
Eastern U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: Southeastern Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Southeastern, the following sample was achieved in 2022/2023:



Overnight Base Size

306

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

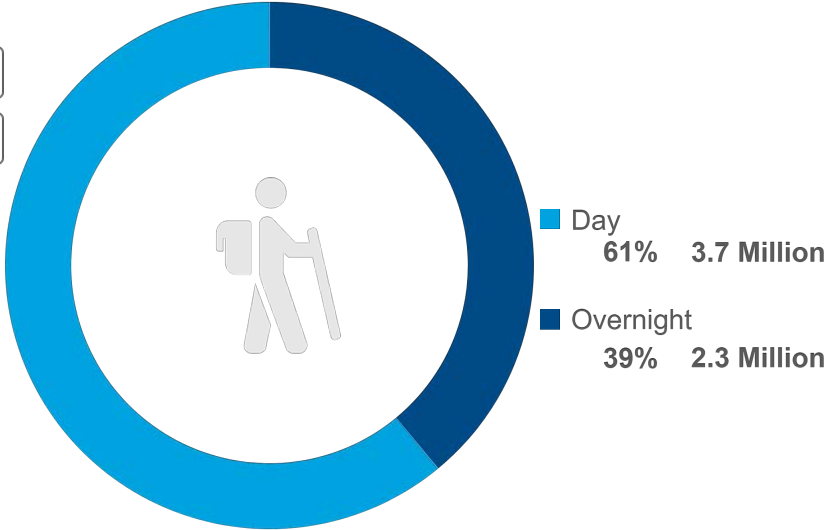
Total Size of Southeastern 2023 Domestic Travel Market

Total Person-Trips

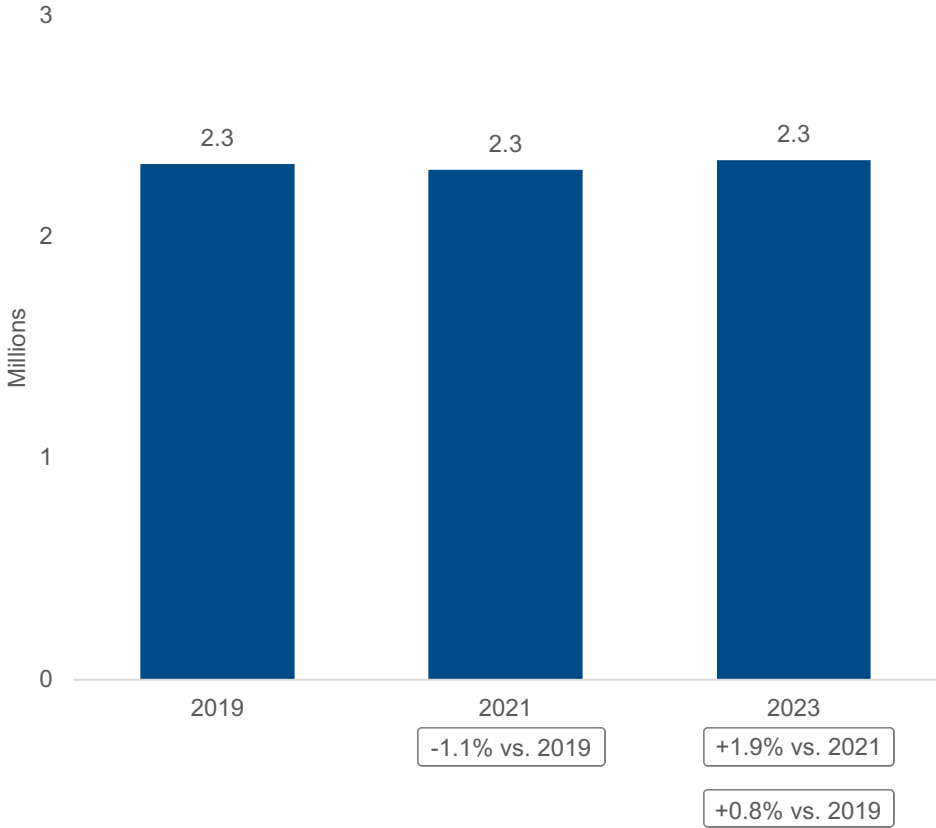
6.0 Million

+3.9% vs. 2021

+9.2% vs. 2019



Overnight Trips to Southeastern



Past Visitation to Southeastern

Base: 2022/2023 Overnight Person-Trips



83% of overnight travelers to Southeastern are repeat visitors

63% of overnight travelers to Southeastern had visited before in the past 12 months

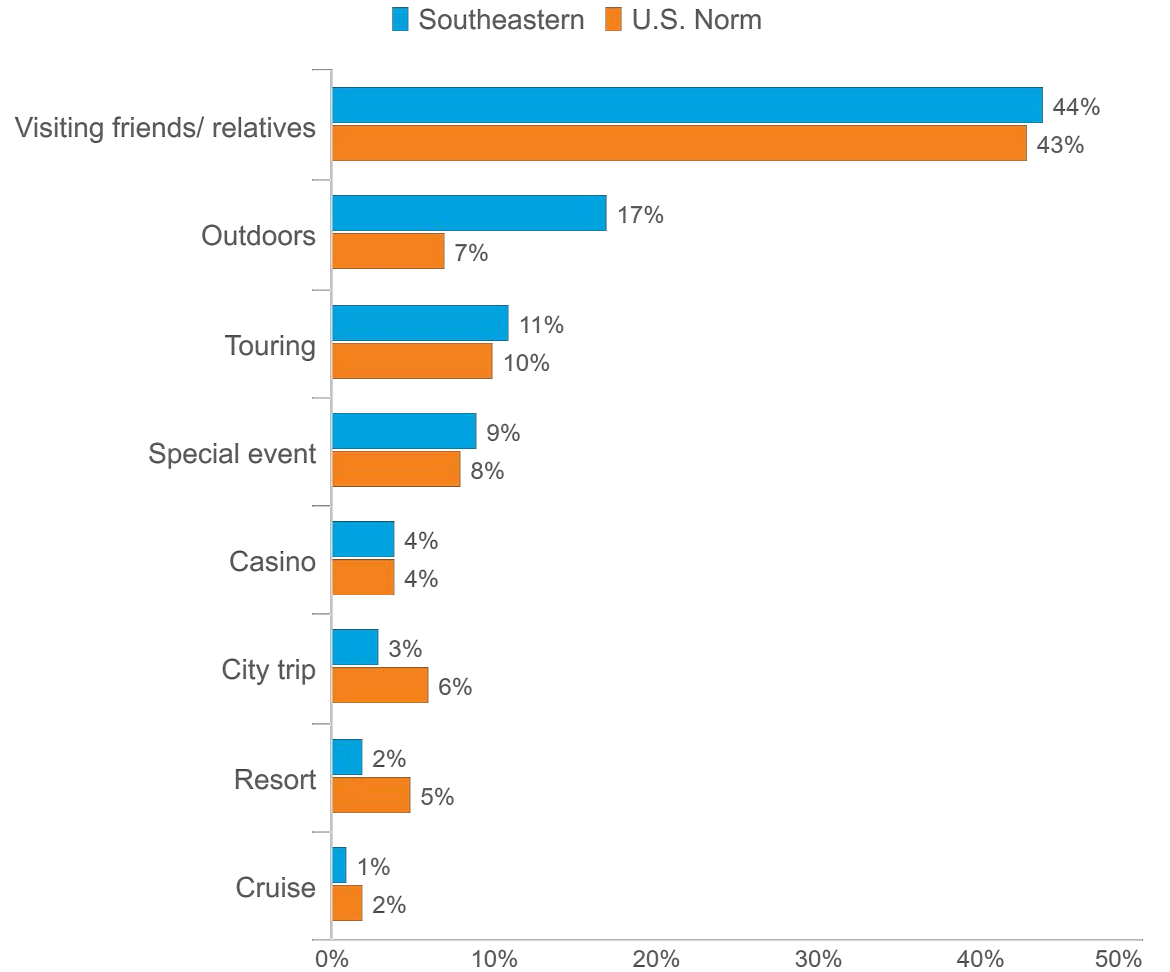
Southeastern's Overnight Trip Characteristics

Base: 2022/2023 Overnight Person-Trips

Main Purpose of Trip

 44% Visiting friends/ relatives	
 17% Outdoors	 2% Conference/ Convention
 11% Touring	
 9% Special event	 4% Other business trip
 4% Casino	
 3% City trip	
 2% Resort	 2% Business-Leisure
 1% Cruise	

Main Purpose of Leisure Trip

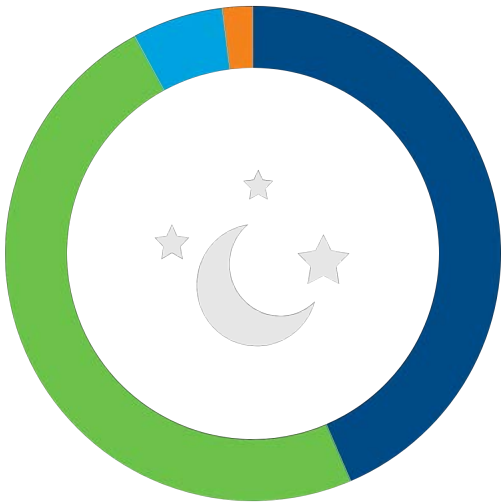


2023 U.S. Overnight Trips



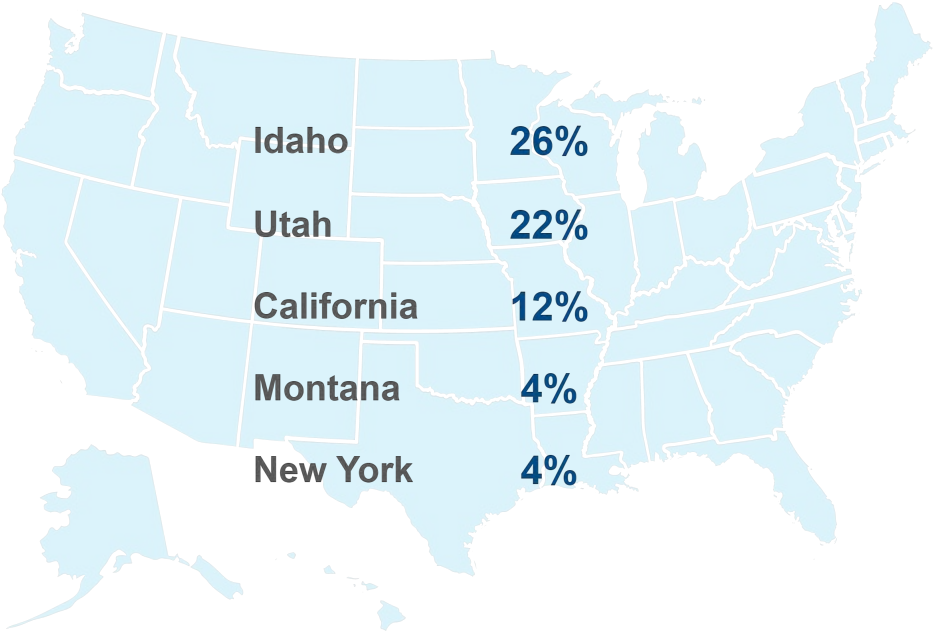
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

Southeastern Overnight Trips

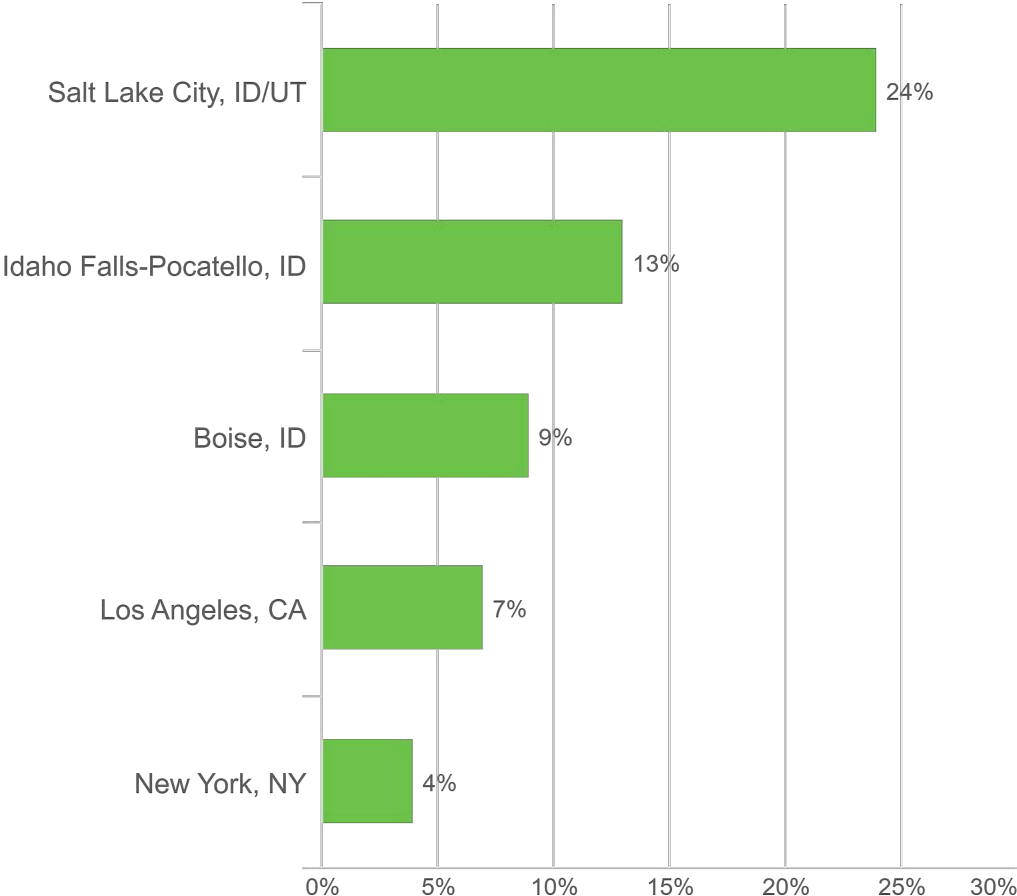


■ Visiting friends/relatives	44%
■ Marketable	49%
■ Business	6%
■ Business-leisure	2%

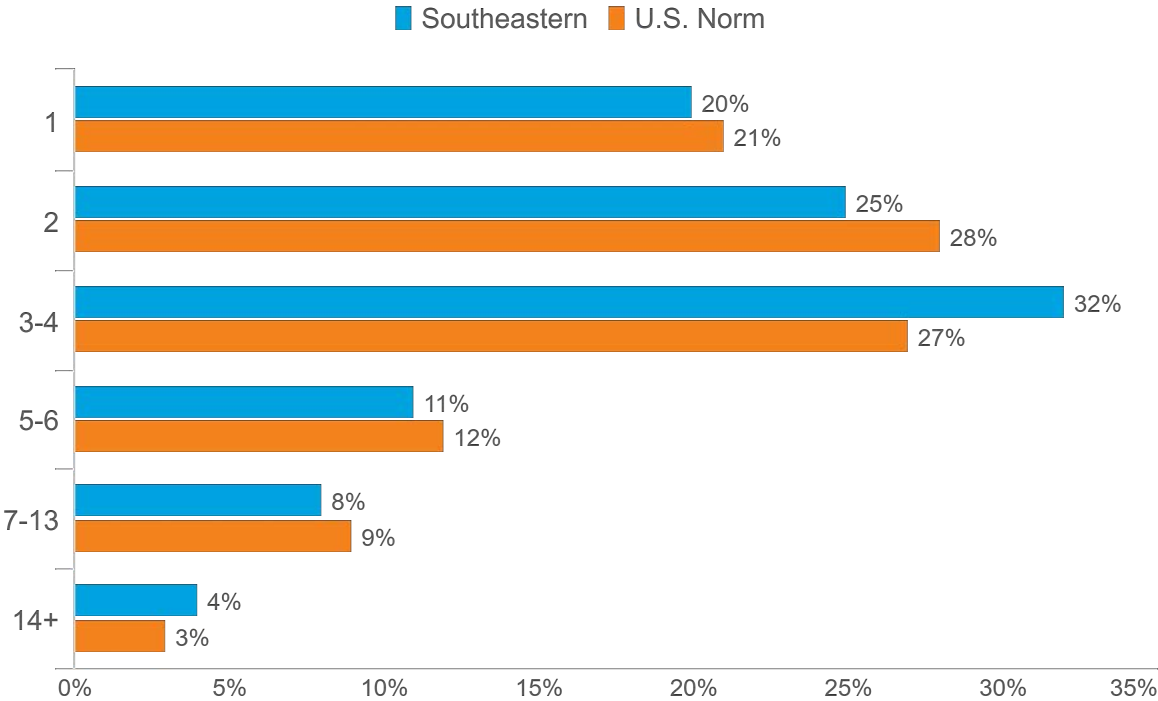
State Origin Of Trip



DMA Origin Of Trip



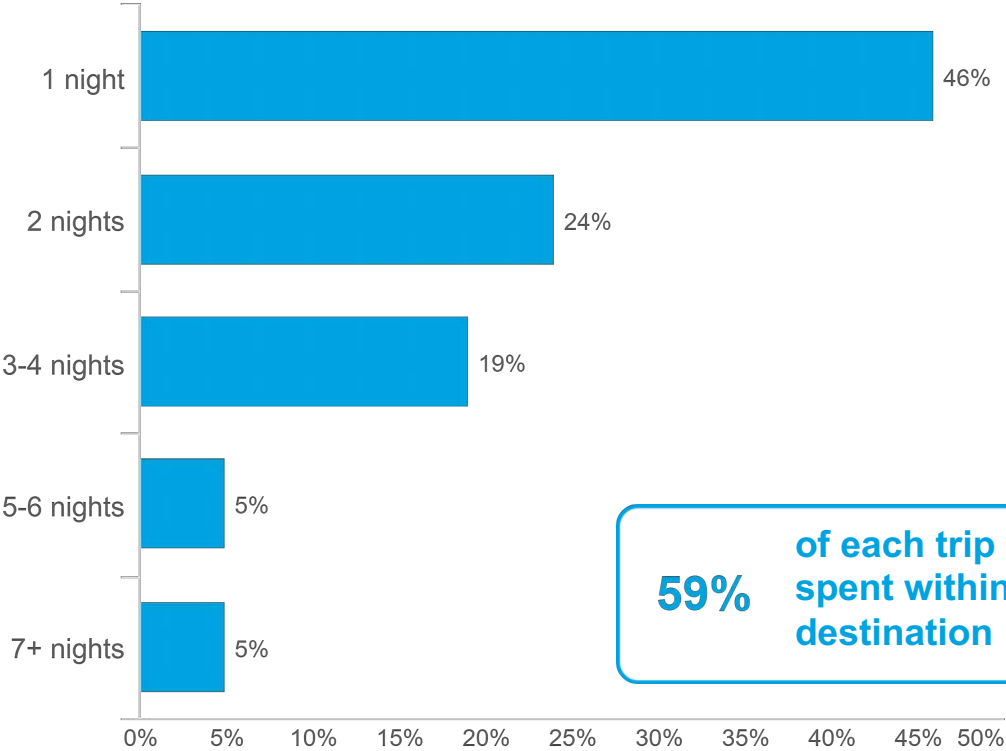
Total Nights Away on Trip



Southeastern
3.8
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Southeastern



59% of each trip was spent within the destination

Average number of nights
2.2

Size of Travel Party

■ Adults ■ Children

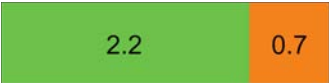
Southeastern



Average number of people

Total
3.4

U.S. Norm



Average number of people

Total
2.9

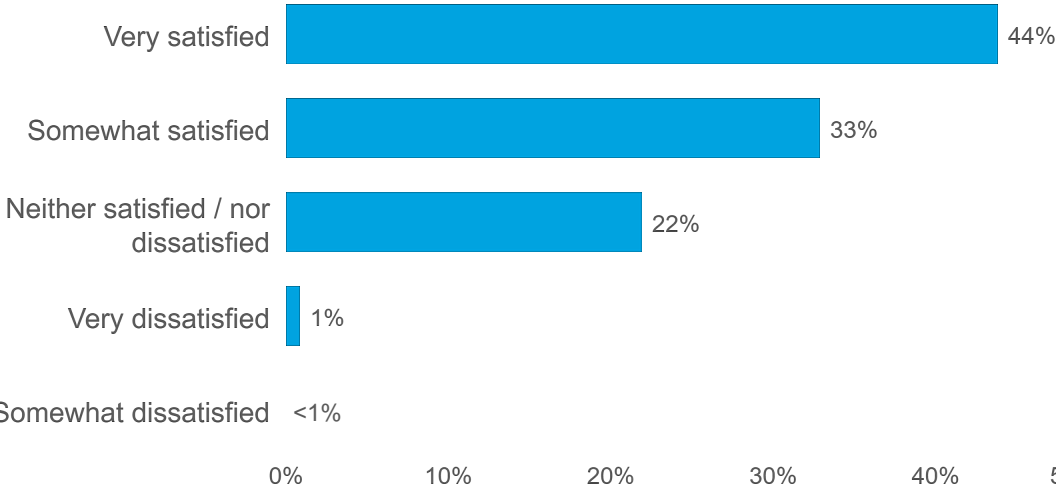


25% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



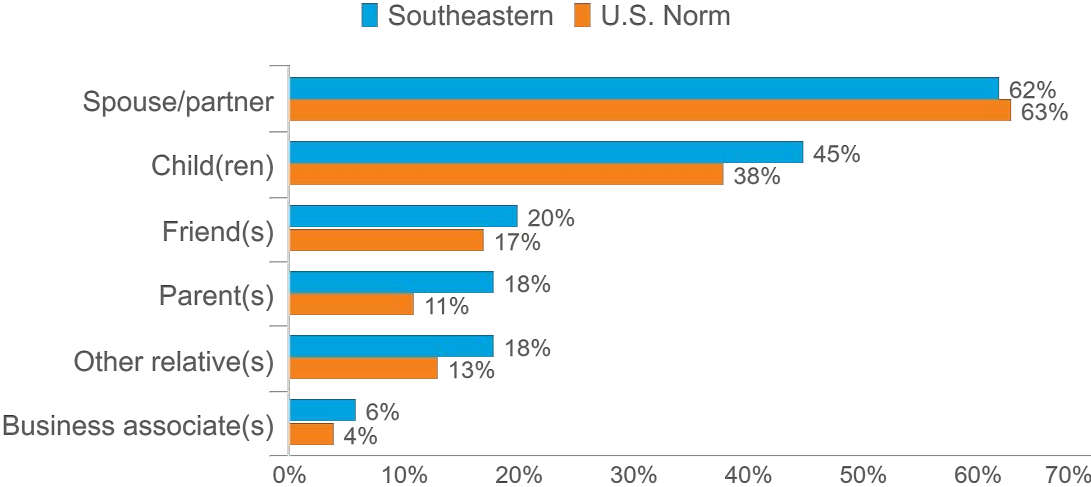


19% of trips only had one person in the travel party

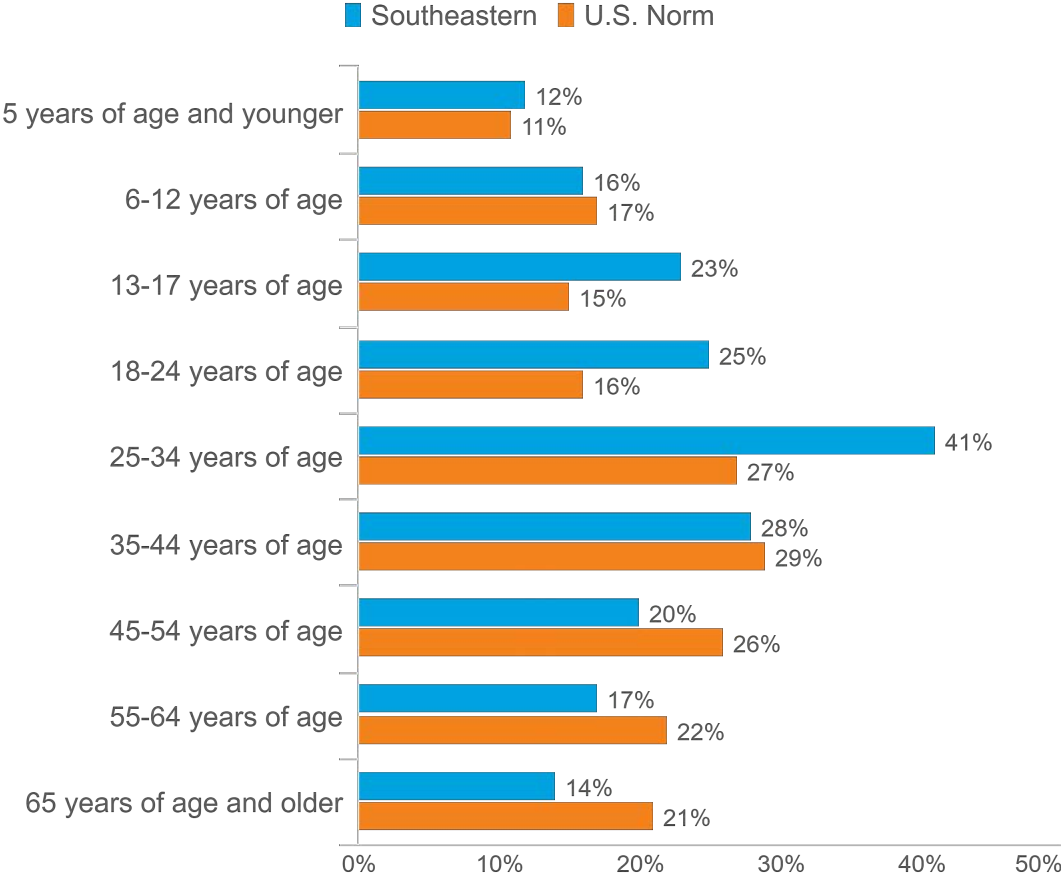
U.S. Norm: 24%

Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person

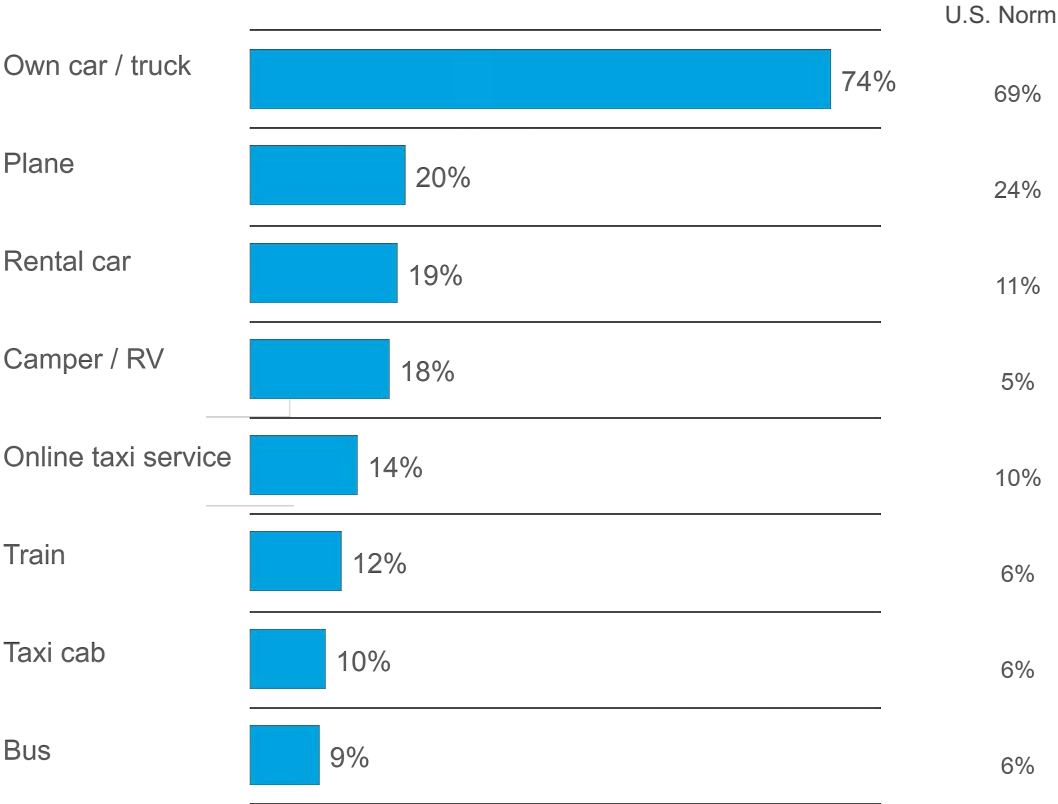


Travel Party Age



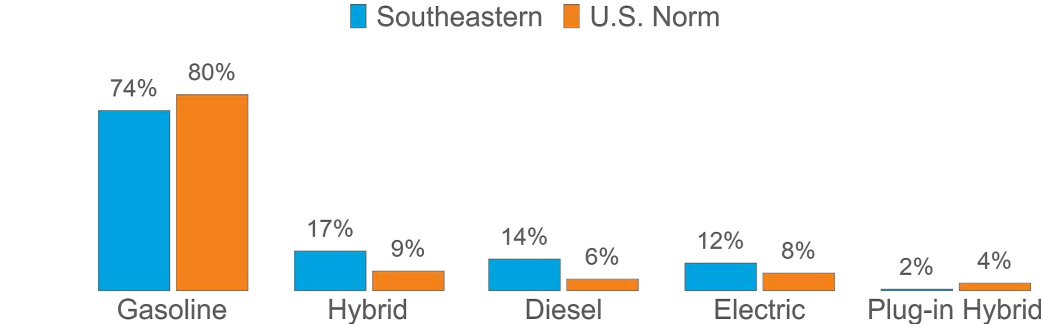
Question added in 2023, data is for 2023 only

Transportation Used to get to Destination



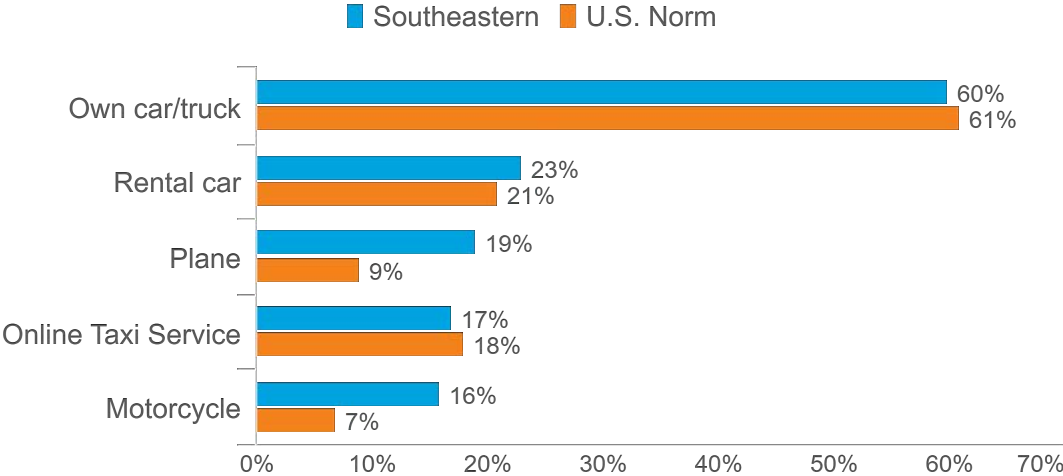
Question updated in 2020

Type of Vehicle Used to get to Destination

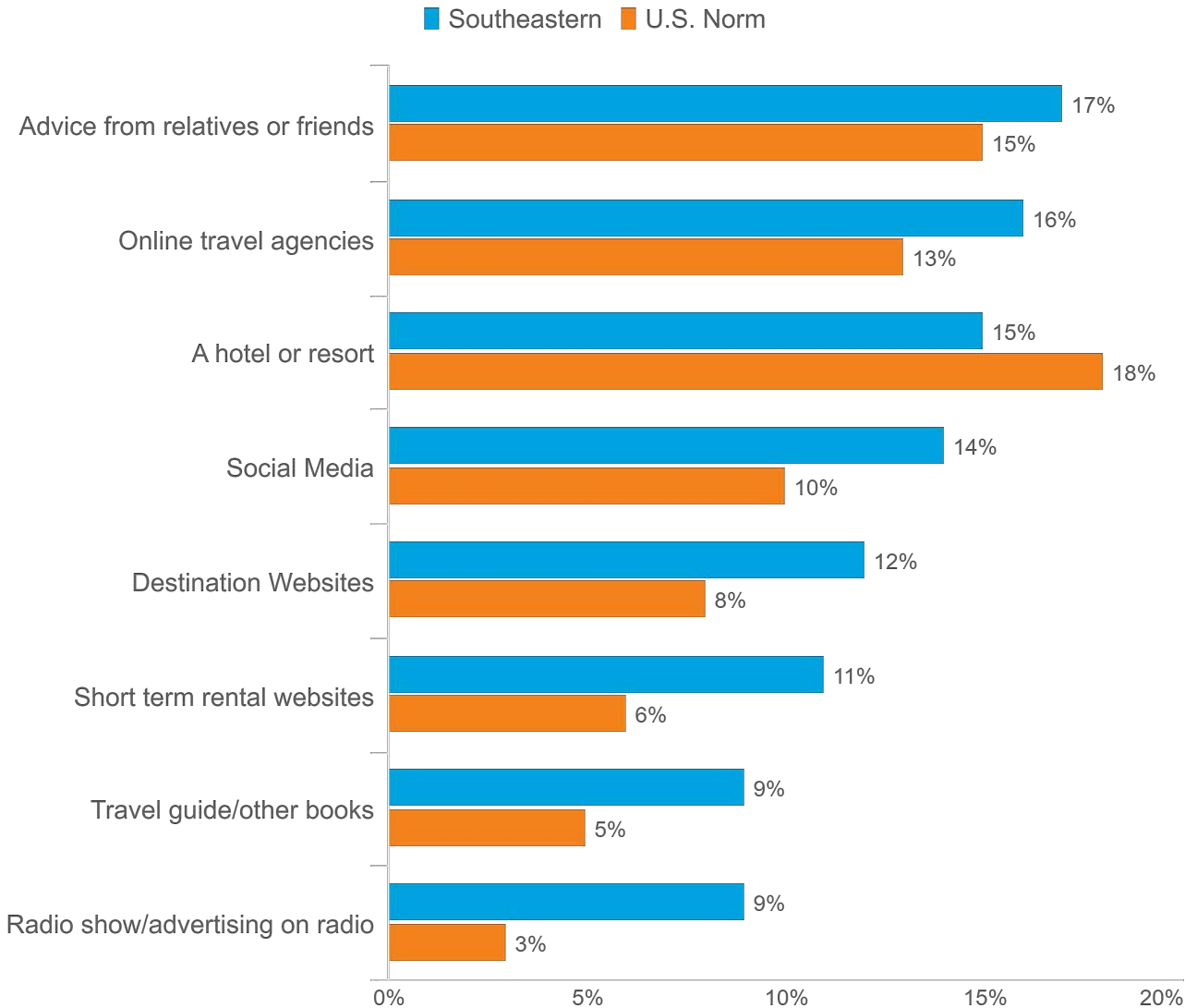


Question added in 2023, data is for 2023 only

Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

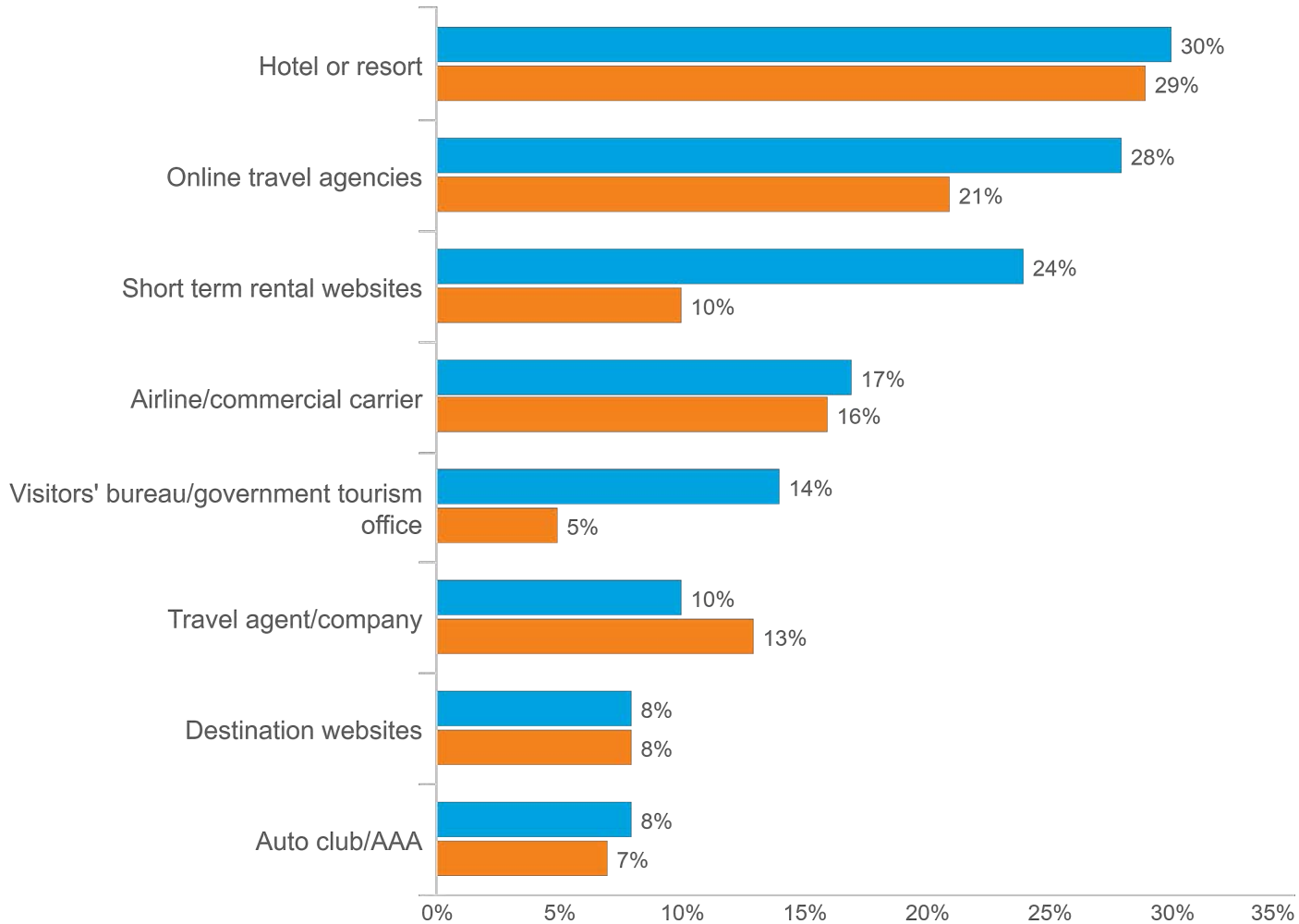
	Southeastern	U.S. Norm
Did not plan anything in advance	16%	15%
More than 1 year in advance	2%	4%
6-12 months	16%	13%
3-5 months	15%	18%
2 months	16%	17%
1 month or less	35%	33%

Southeastern's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ Southeastern ■ U.S. Norm



Accommodations

		Southeastern	U.S. Norm
	Hotel	34%	42%
	Home of friends / relatives	21%	22%
	Rented home / condo / apartment	14%	7%
	Motel	14%	11%
	Campground / RV park	14%	5%
	Rented cottage / cabin	10%	4%
	Time share	8%	3%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)

	Southeastern	U.S. Norm
Sightseeing	21%	20%
Attending celebration	20%	15%
Shopping	16%	26%
Landmark/historic site	15%	13%
Hiking/backpacking	15%	8%
Swimming	15%	14%
Convention for personal interest	13%	5%
Visited American Indian Community	13%	4%
Civil Rights/African-American heritage sights/experiences	12%	5%
Nature tours/wildlife viewing/birding	12%	8%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

	Southeastern	U.S. Norm
 Convenience/grocery shopping	66%	42%
 Shopping at locally owned businesses	64%	48%
 Big box stores (Walmart, Costco)	48%	30%
 Outlet/mall shopping	39%	44%
 Antiquing	31%	12%
 Souvenir shopping	22%	38%
 Farmers market	13%	17%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

	Southeastern	U.S. Norm
 Fast food	48%	45%
 Casual dining	43%	56%
 Unique/local food	26%	30%
 Picnicking	24%	11%
 Carry-out/food delivery service	21%	22%
 Fine/upscale dining	13%	19%

Question updated in 2023, data is for 2023 only



67%
of overnight travelers were
very satisfied with their overall
trip experience



Safety/security

58%



Friendliness of people

55%



Sightseeing/attractions

55%



Quality of accommodations

51%



Cleanliness

50%



Quality of food

49%



Value for money

43%



Music/nightlife/entertainment

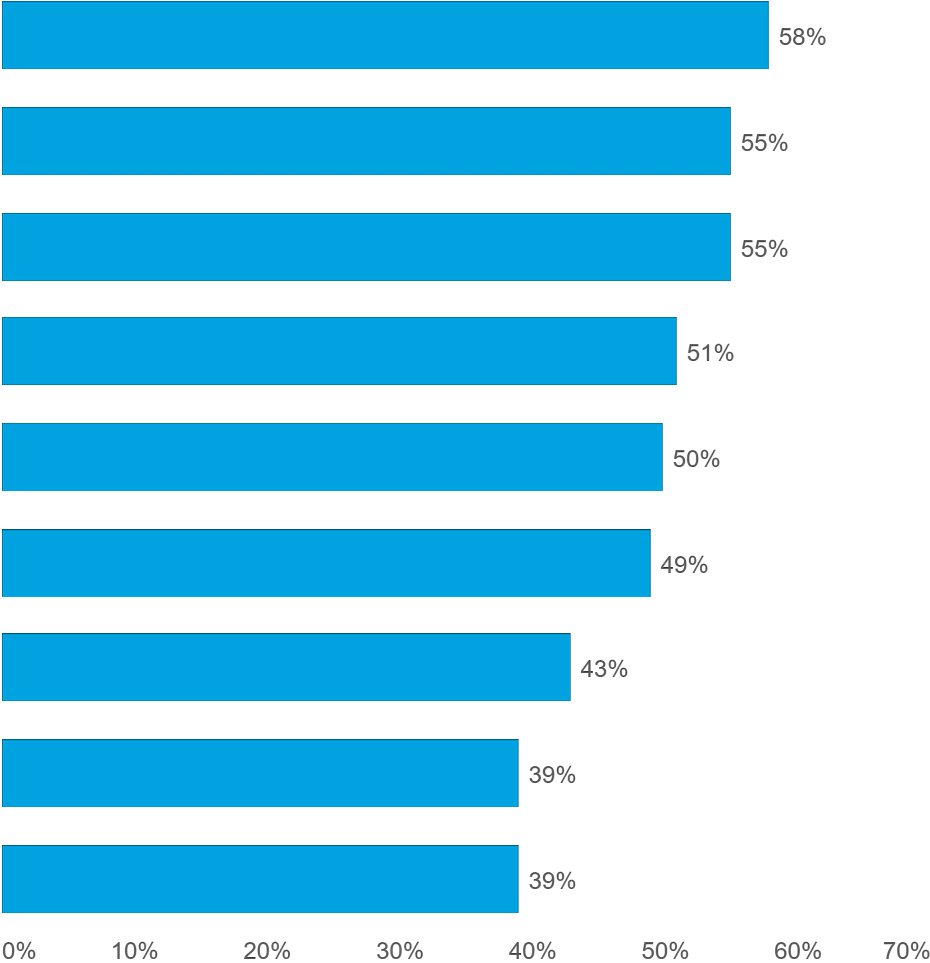
39%



Public transportation

39%

% Very Satisfied with Trip

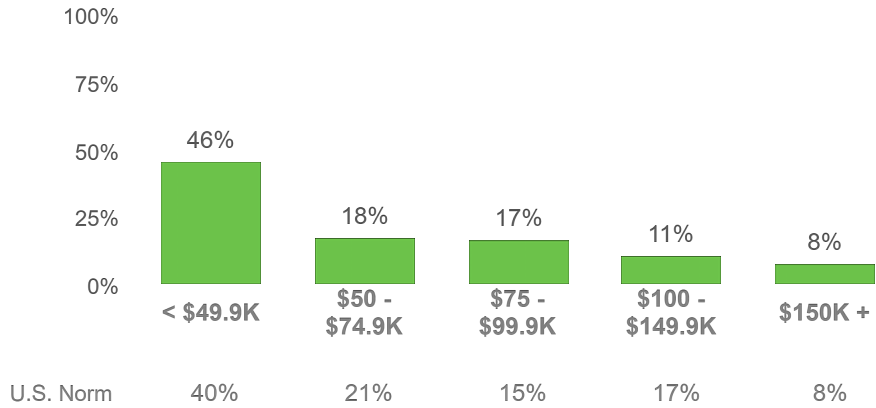


*Very Satisfied = selected top box on a five point scale

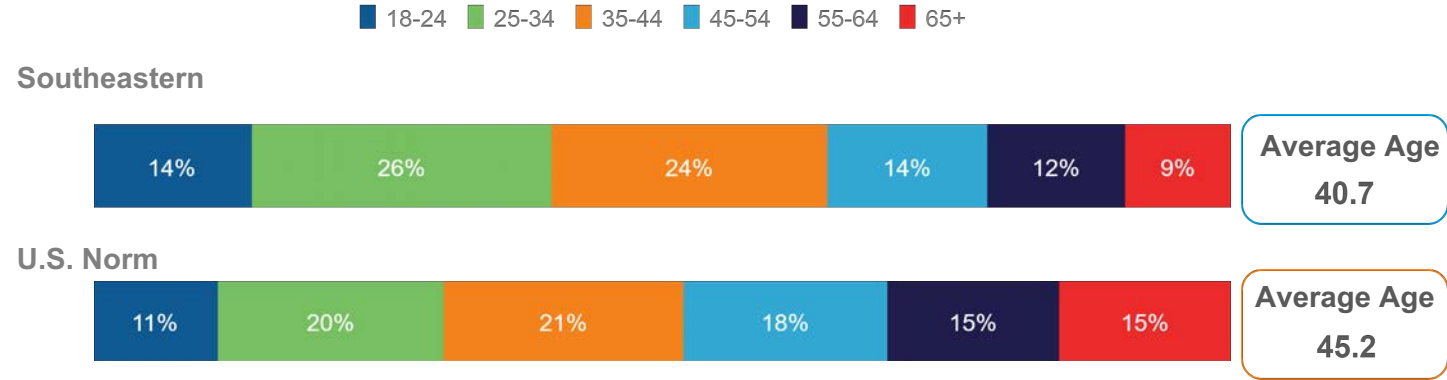
Demographic Profile of Overnight Southeastern Visitors

Base: 2022/2023 Overnight Person-Trips

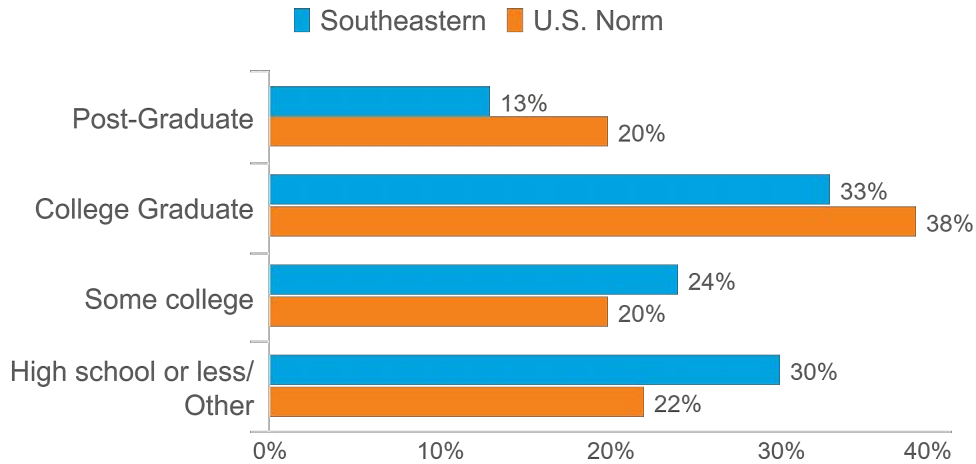
Household Income



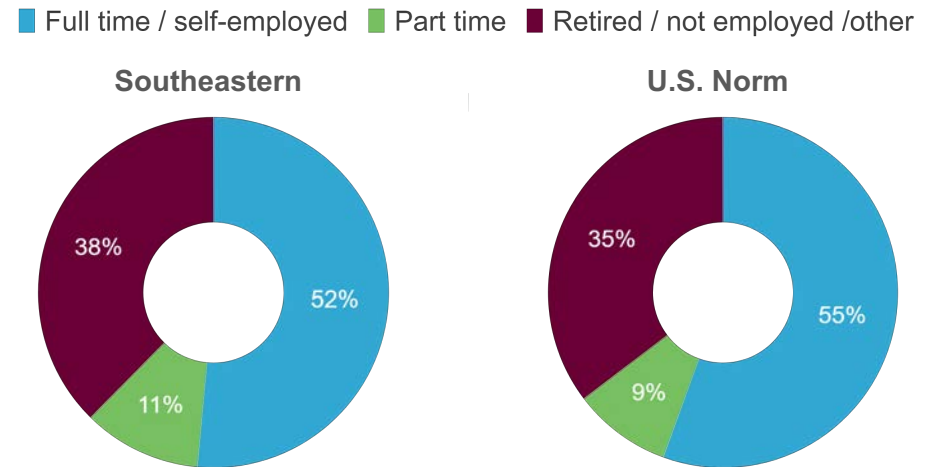
Age



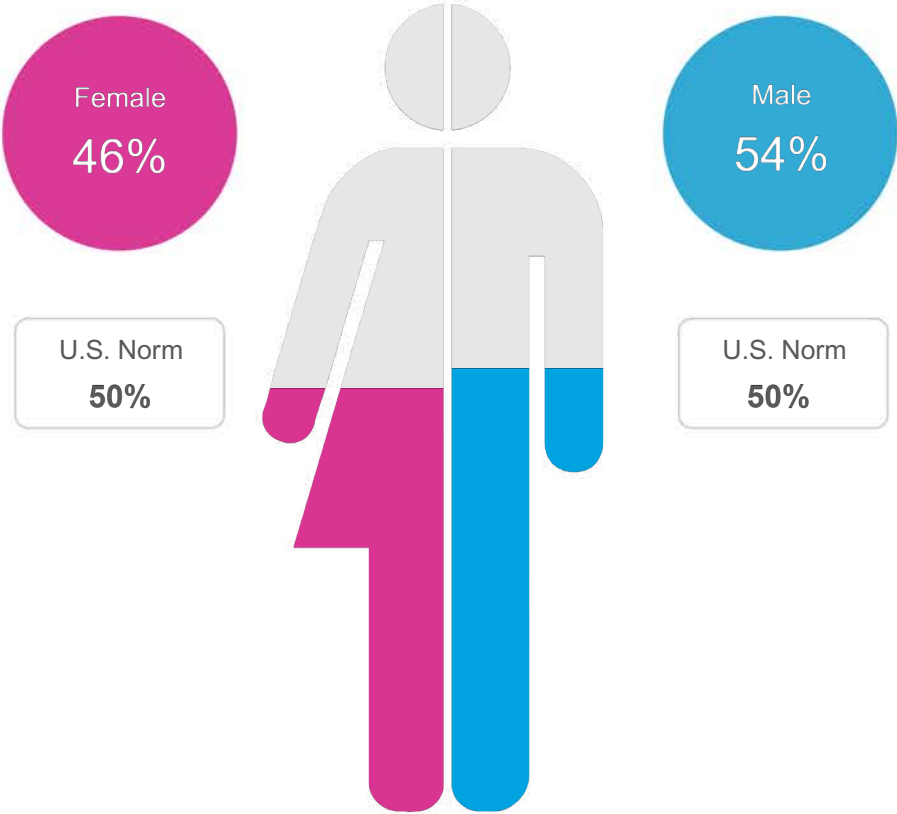
Educational Attainment



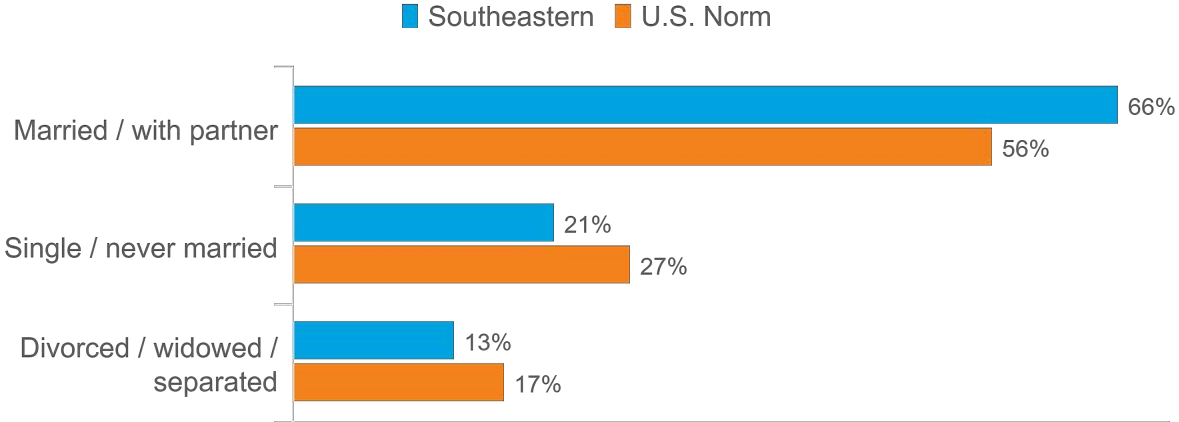
Employment



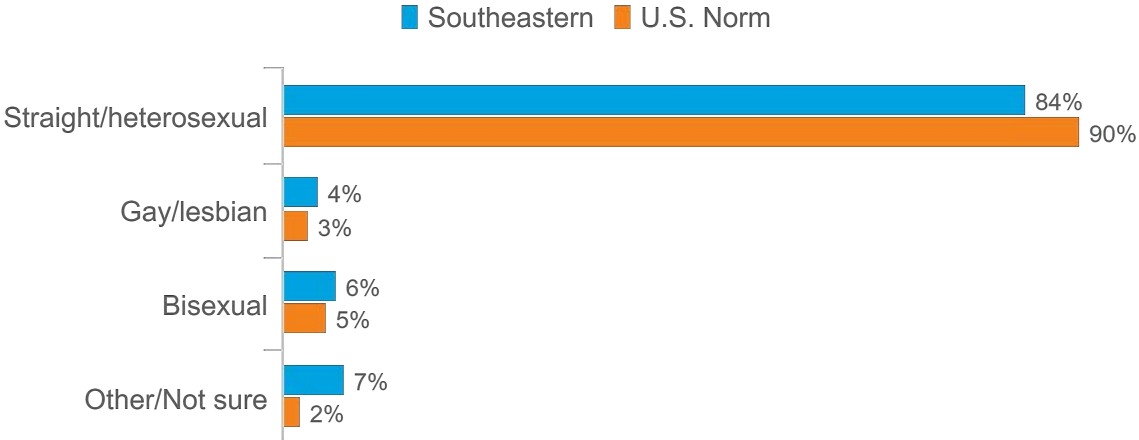
Gender



Marital Status



Sexual Orientation

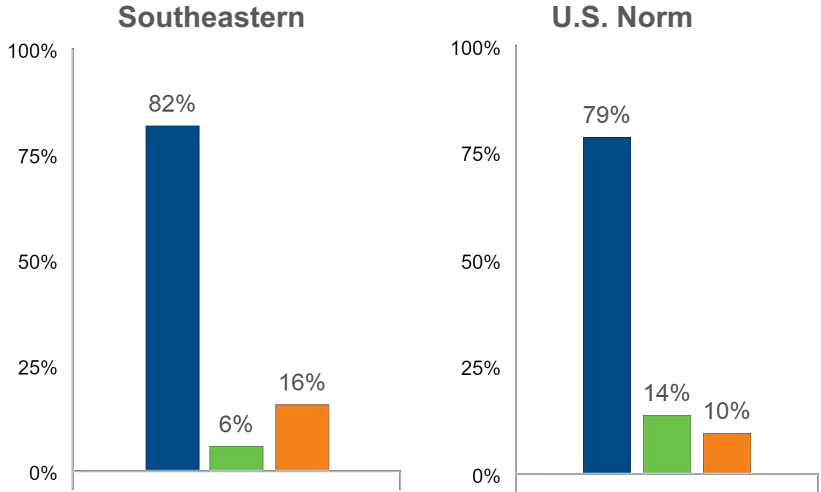


Demographic Profile of Overnight Southeastern Visitors

Base: 2022/2023 Overnight Person-Trips

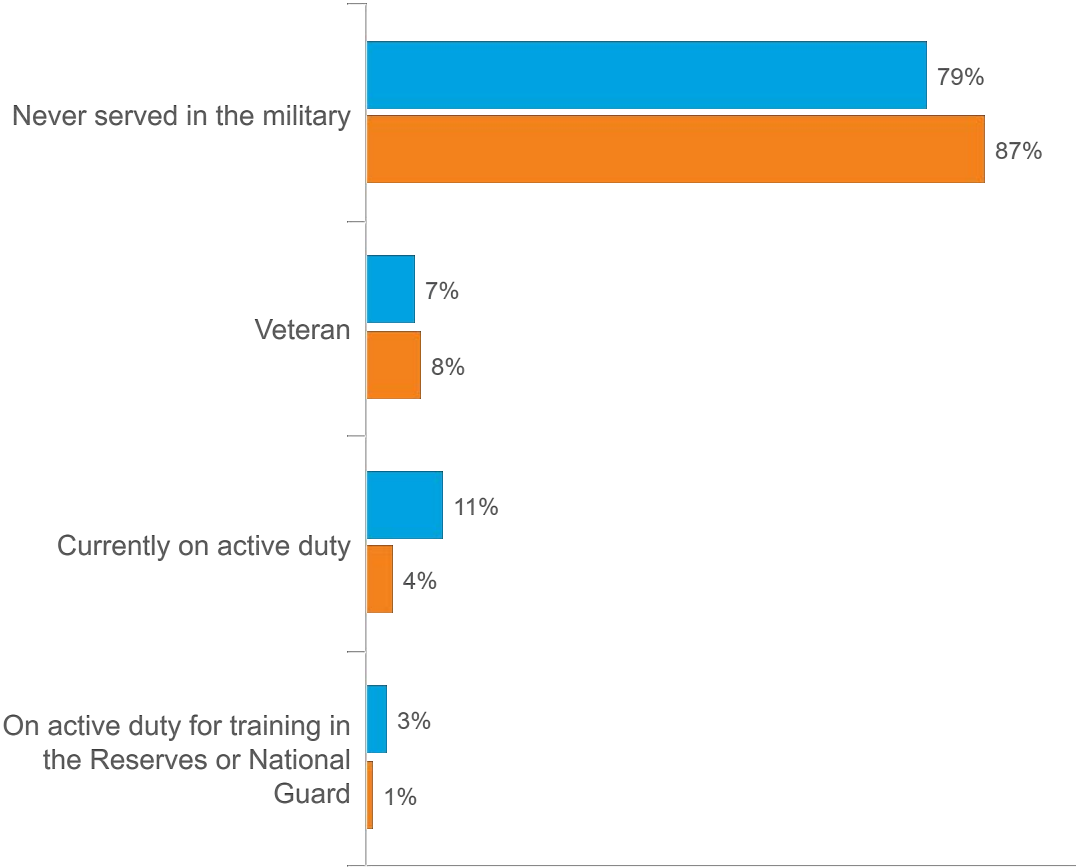
Race

White African-American Other



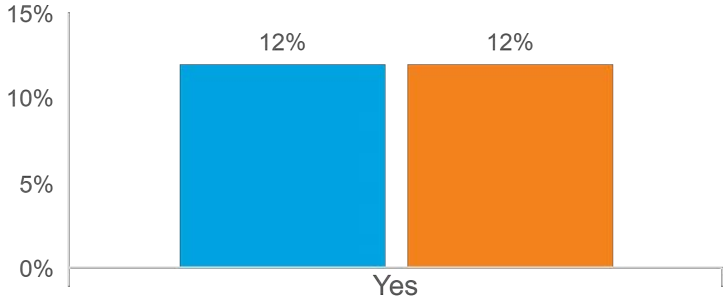
Military Status

Southeastern U.S. Norm

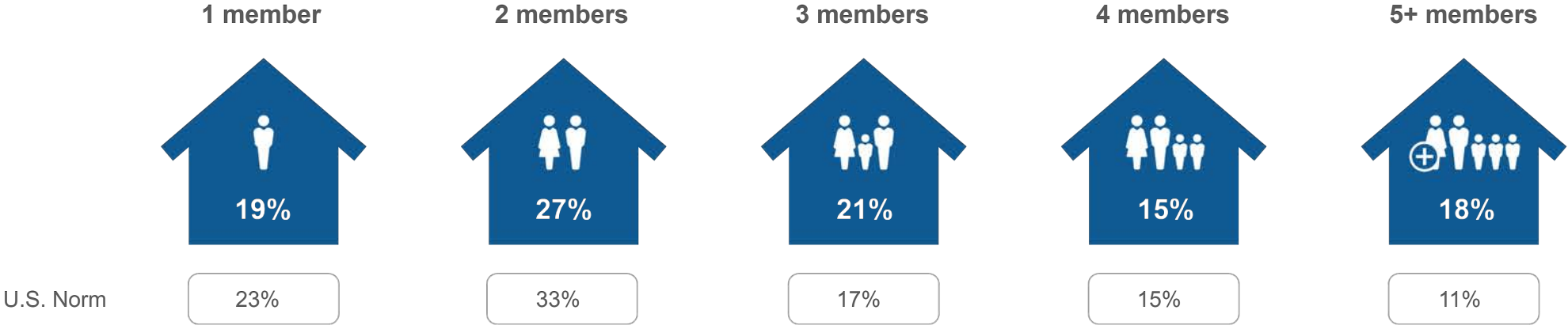


Hispanic Background

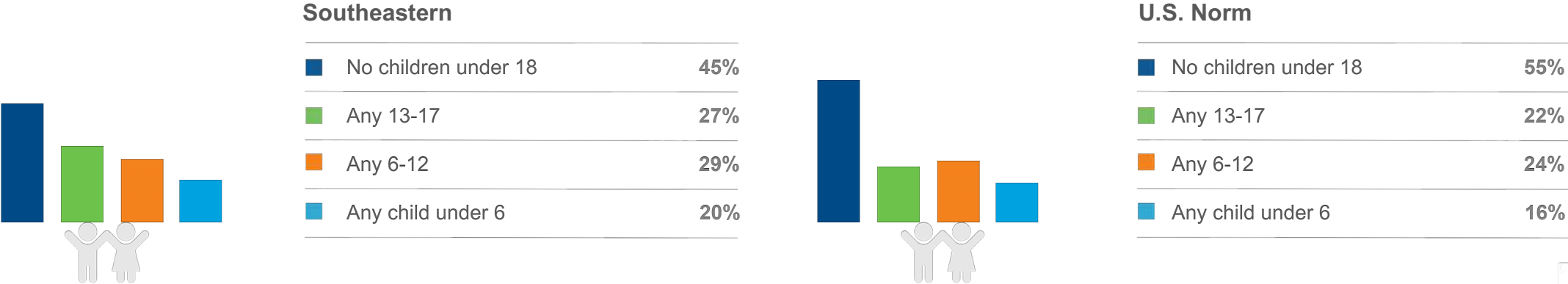
Southeastern U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: South Central Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For South Central, the following sample was achieved in 2022/2023:



Overnight Base Size

232

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

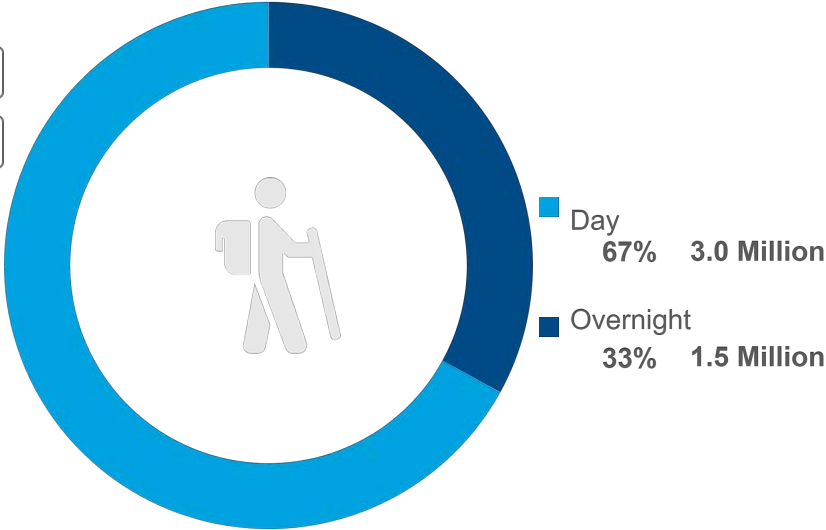
Total Size of South Central 2023 Domestic Travel Market

Total Person-Trips

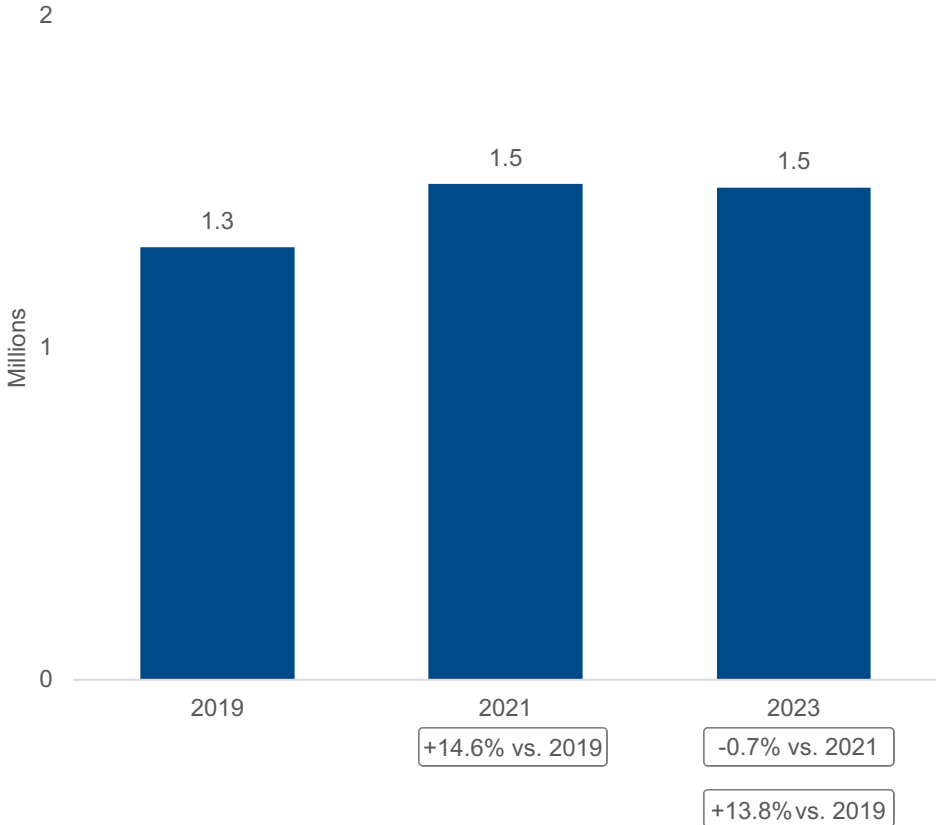
4.5 Million

+3.6% vs. 2021

+18.2% vs. 2019



Overnight Trips to South Central














Past Visitation to South Central

Base: 2022/2023 Overnight Person-Trips

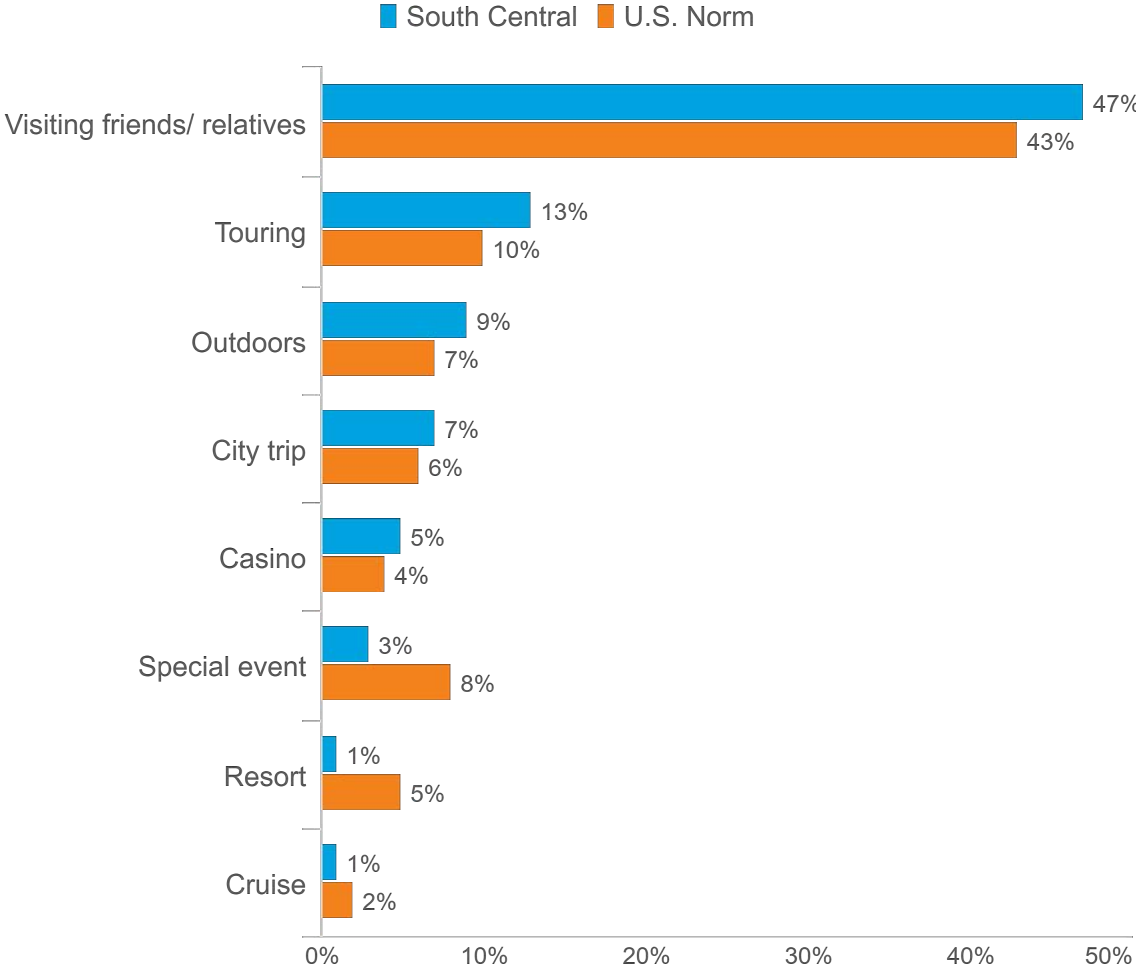
73% of overnight travelers to South Central are repeat visitors

57% of overnight travelers to South Central had visited before in the past 12 months

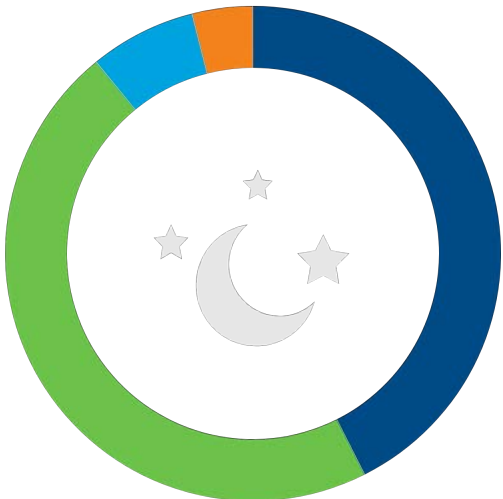
Main Purpose of Trip

 47% Visiting friends/ relatives	
 13% Touring	 <1% Conference/ Convention
 9% Outdoors	
 7% City trip	 6% Other business trip
 5% Casino	
 3% Special event	
 1% Resort	 7% Business-Leisure
 1% Cruise	

Main Purpose of Leisure Trip

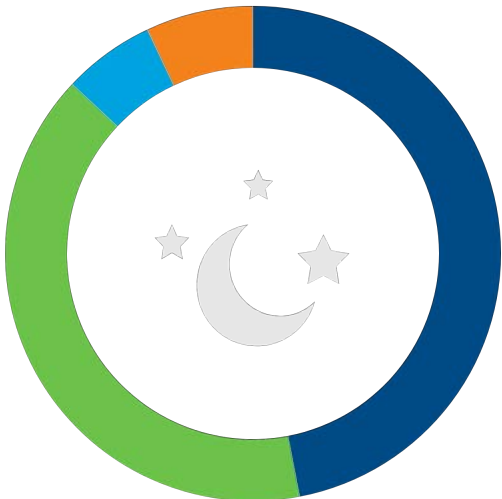


2023 U.S. Overnight Trips



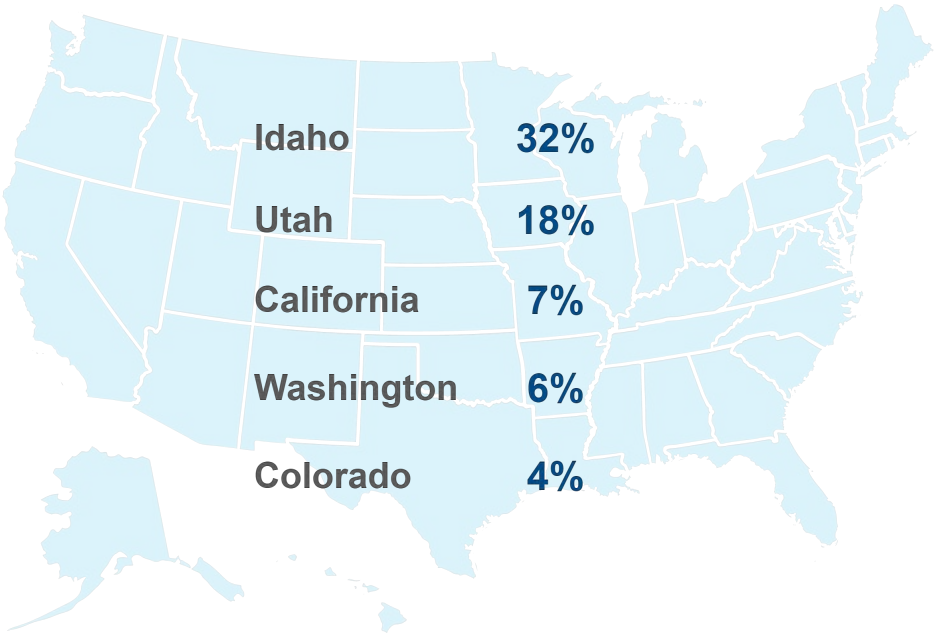
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

South Central Overnight Trips

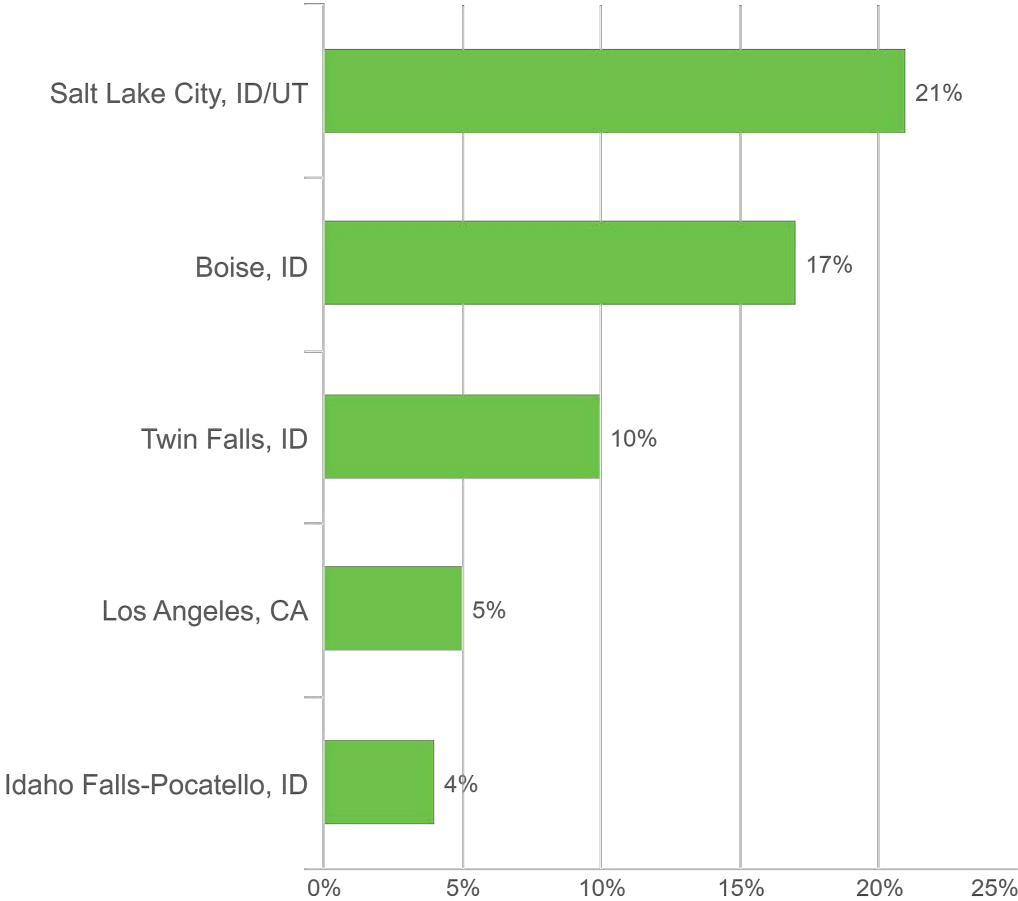


■ Visiting friends/relatives	47%
■ Marketable	40%
■ Business	6%
■ Business-leisure	7%

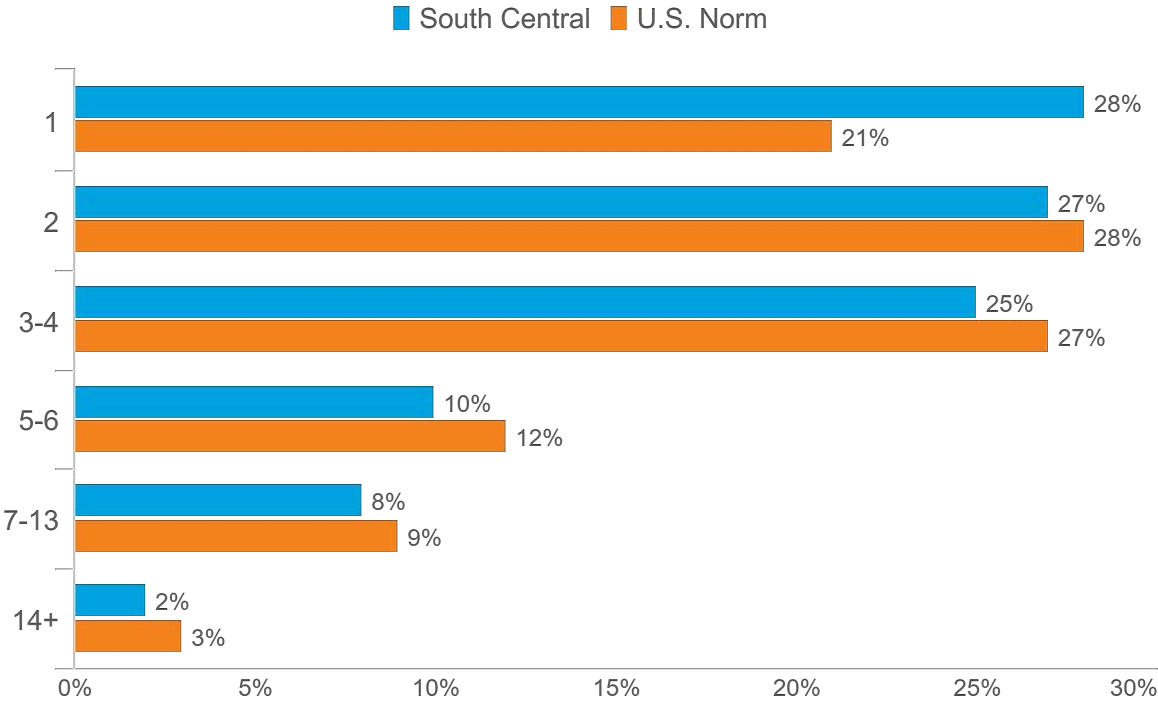
State Origin Of Trip



DMA Origin Of Trip



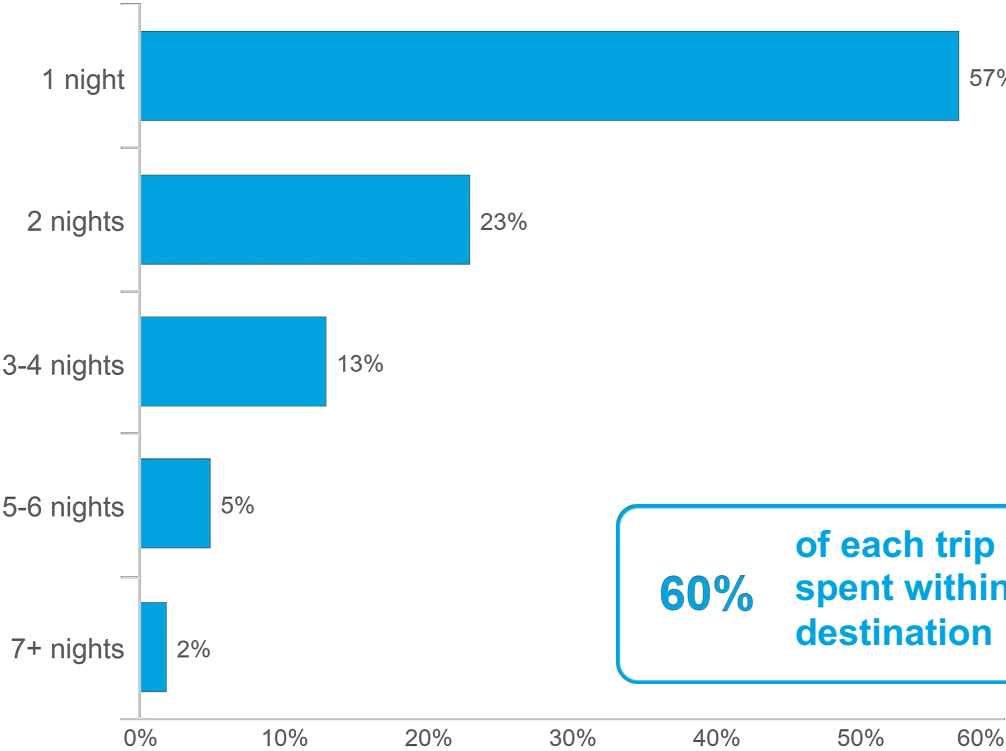
Total Nights Away on Trip



South Central
3.2
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in South Central



60% of each trip was spent within the destination

Average number of nights
1.9

Size of Travel Party

■ Adults ■ Children

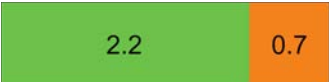
South Central



Average number of people

Total
2.7

U.S. Norm



Average number of people

Total
2.9

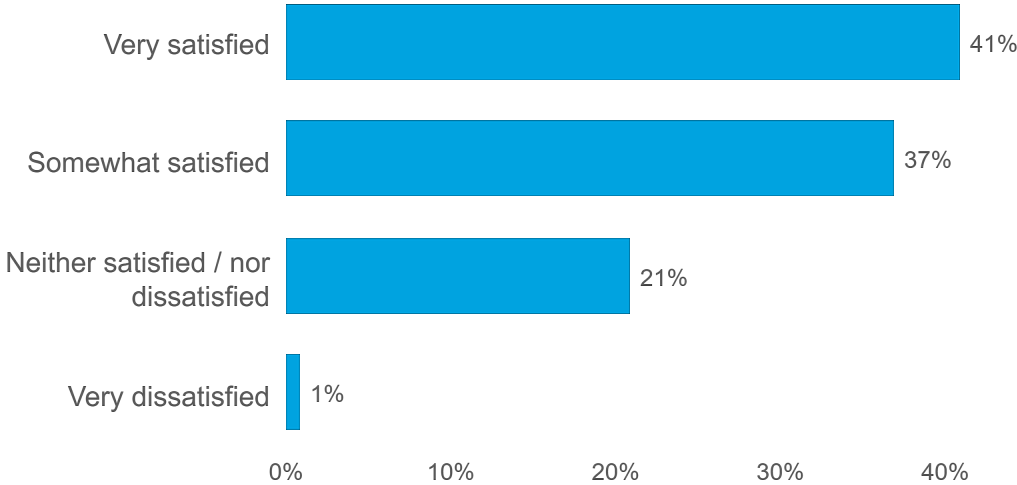


26% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



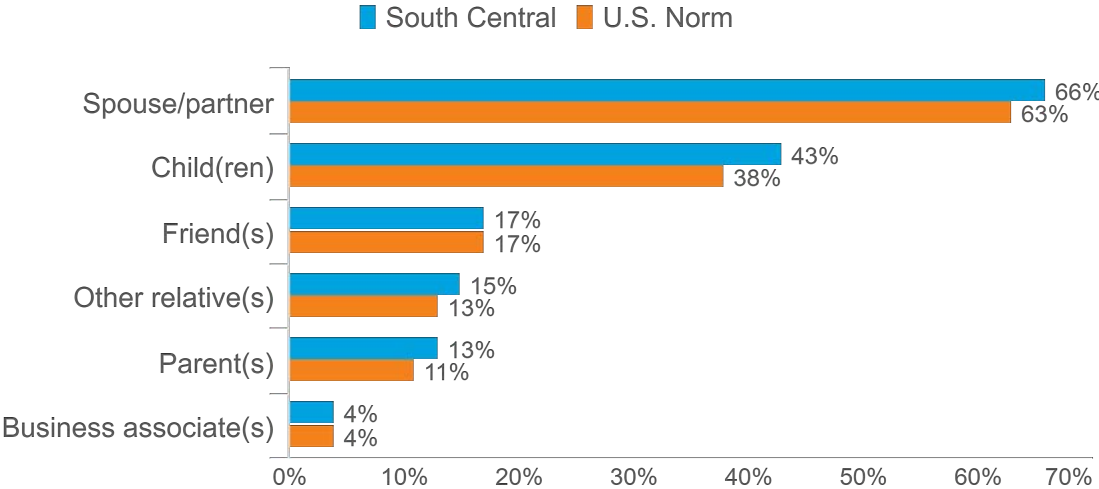


27% of trips only had one person in the travel party

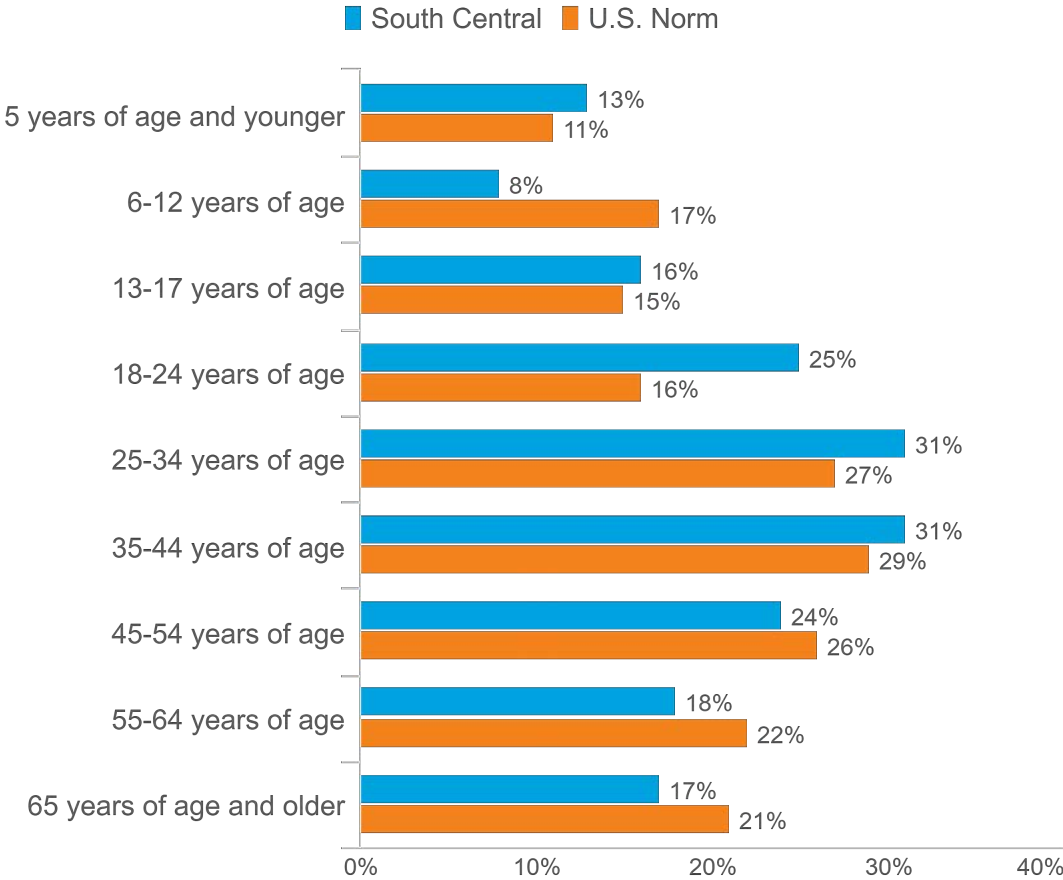
U.S. Norm: 24%

Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person

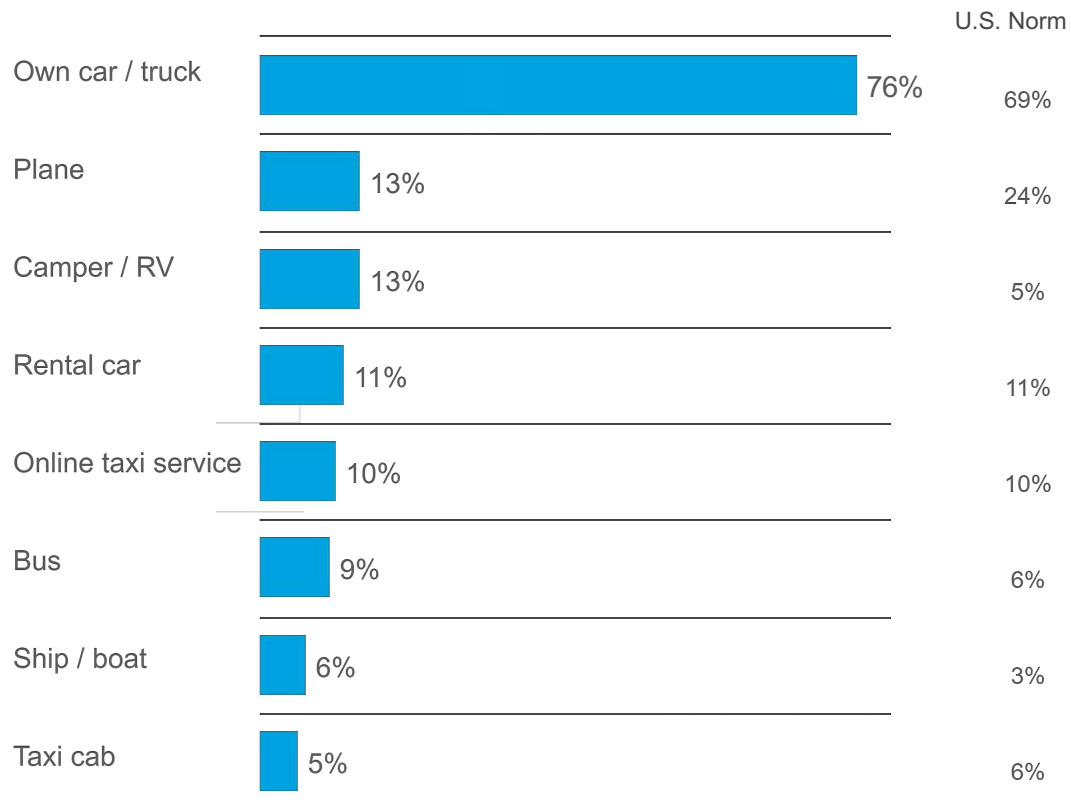


Travel Party Age

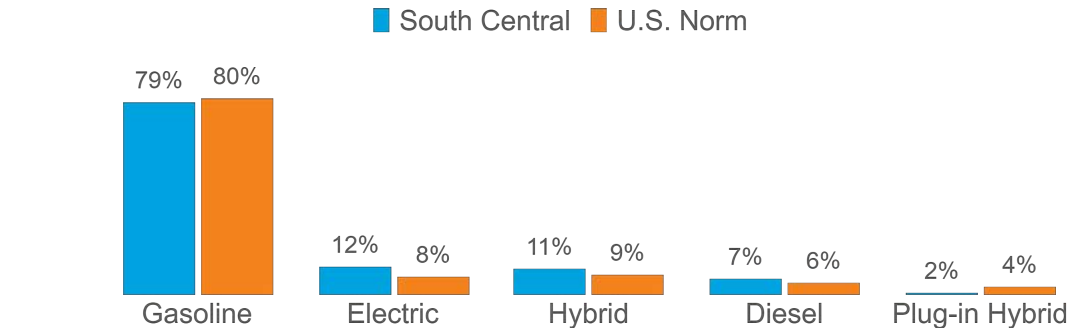


Question added in 2023, data is for 2023 only

Transportation Used to get to Destination

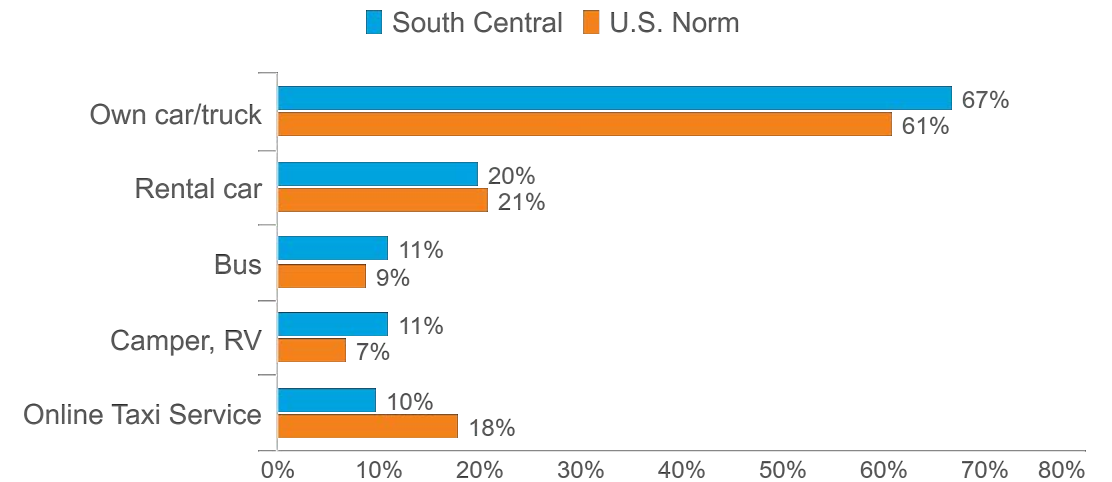


Type of Vehicle Used to get to Destination



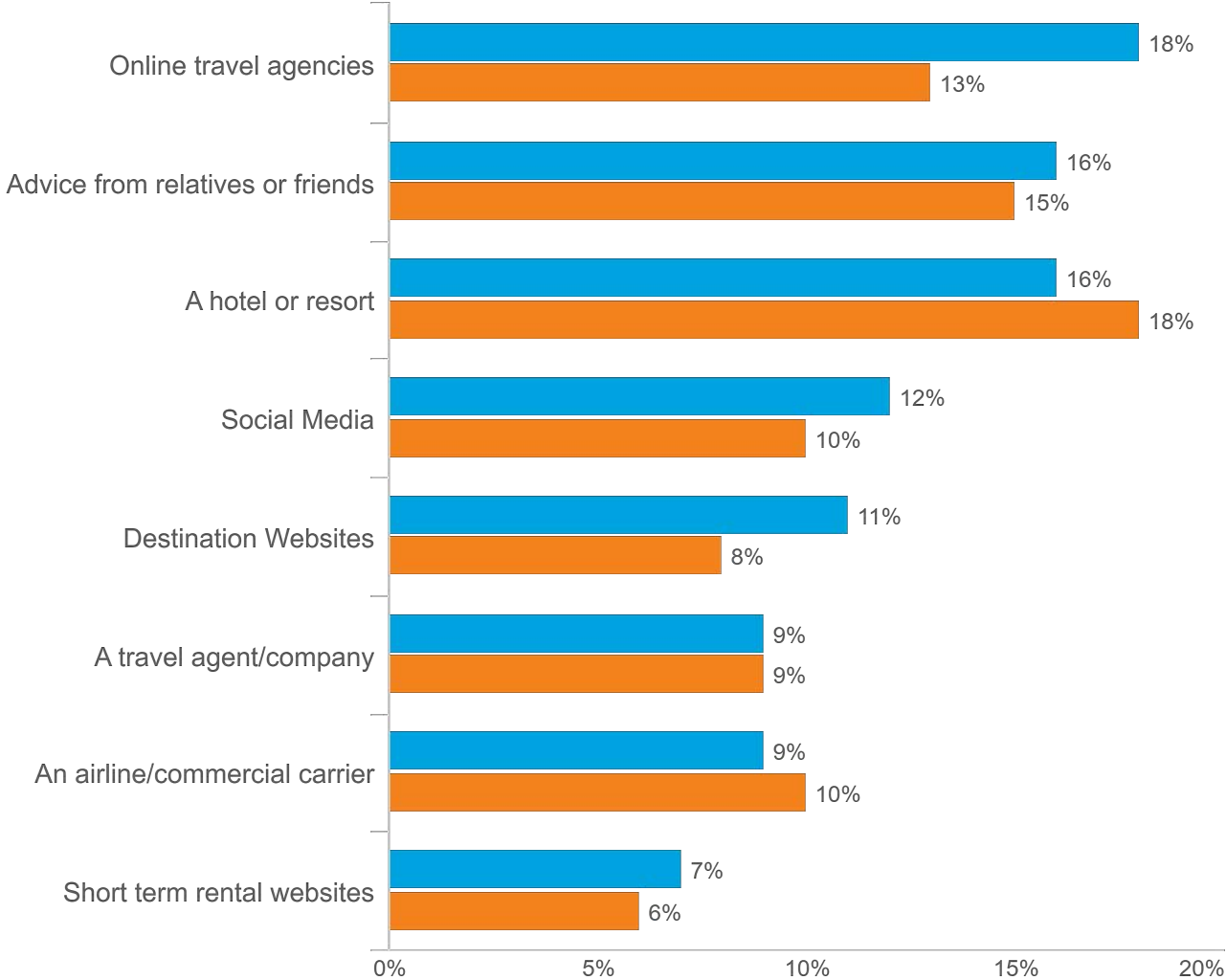
Question added in 2023, data is for 2023 only

Transportation Used within Destination



Trip Planning Information Sources

■ South Central ■ U.S. Norm



Length of Trip Planning

	South Central	U.S. Norm
Did not plan anything in advance	12%	15%
More than 1 year in advance	4%	4%
6-12 months	11%	13%
3-5 months	16%	18%
2 months	15%	17%
1 month or less	42%	33%

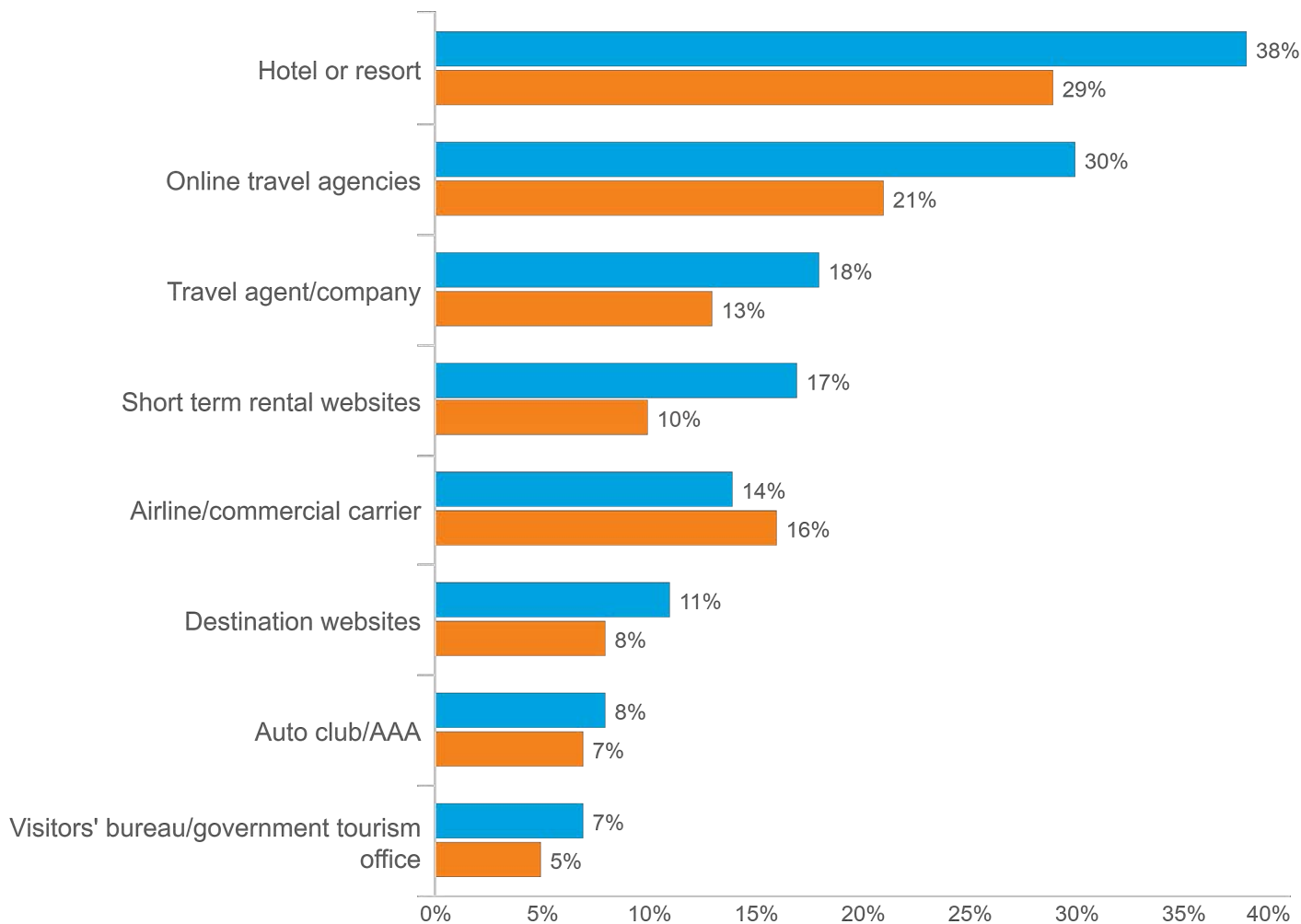


South Central's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ South Central ■ U.S. Norm



Accommodations

		South Central	U.S. Norm
	Hotel	40%	42%
	Home of friends / relatives	24%	22%
	Motel	20%	11%
	Bed & breakfast	8%	6%
	Rented home / condo / apartment	8%	7%
	Campground / RV park	7%	5%
	Resort hotel	6%	10%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)

	South Central	U.S. Norm
Shopping	24%	26%
Sightseeing	23%	20%
Local parks/playgrounds	18%	10%
Landmark/historic site	18%	13%
Attending celebration	17%	15%
Swimming	16%	14%
Fishing	15%	6%
Casino	15%	11%
National/state park	14%	8%
Bar/nightclub	13%	15%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

		South Central	U.S. Norm
	Convenience/grocery shopping	67%	42%
	Shopping at locally owned businesses	60%	48%
	Big box stores (Walmart, Costco)	57%	30%
	Farmers market	29%	17%
	Outlet/mall shopping	28%	44%
	Souvenir shopping	27%	38%
	Antiquing	25%	12%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

		South Central	U.S. Norm
	Fast food	55%	45%
	Casual dining	54%	56%
	Unique/local food	26%	30%
	Carry-out/food delivery service	24%	22%
	Picnicking	18%	11%
	Fine/upscale dining	16%	19%

Question updated in 2023, data is for 2023 only



63%
of overnight travelers were
very satisfied with their overall
trip experience



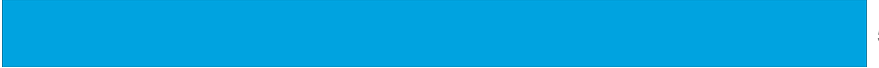
Safety/security



57%



Friendliness of people



56%



Cleanliness



56%



Sightseeing/attractions



53%



Quality of accommodations



50%



Value for money



49%



Quality of food



44%



Music/nightlife/entertainment



41%



Public transportation



34%

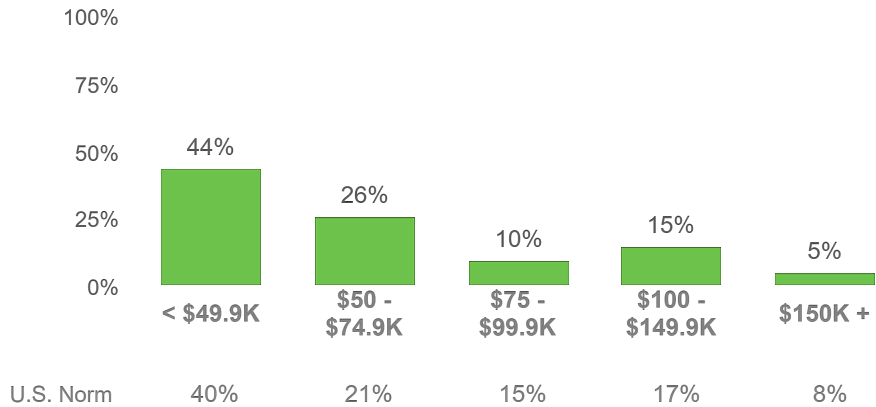
0% 10% 20% 30% 40% 50% 60%

*Very Satisfied = selected top box on a five point scale

Demographic Profile of Overnight South Central Visitors

Base: 2022/2023 Overnight Person-Trips

Household Income



Age

18-24 25-34 35-44 45-54 55-64 65+

South Central



Average Age
44.3

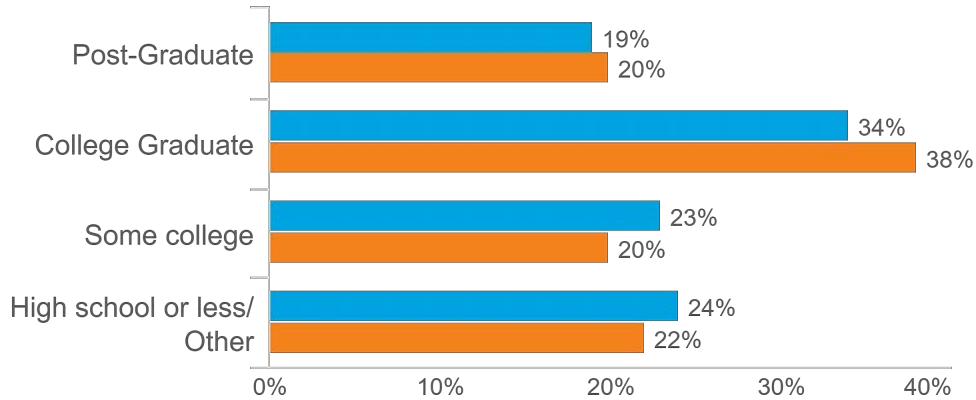
U.S. Norm



Average Age
45.2

Educational Attainment

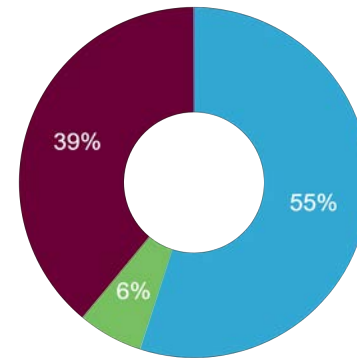
South Central U.S. Norm



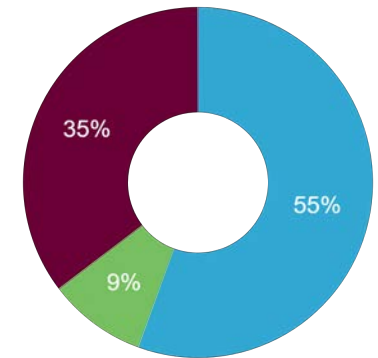
Employment

Full time / self-employed Part time Retired / not employed / other

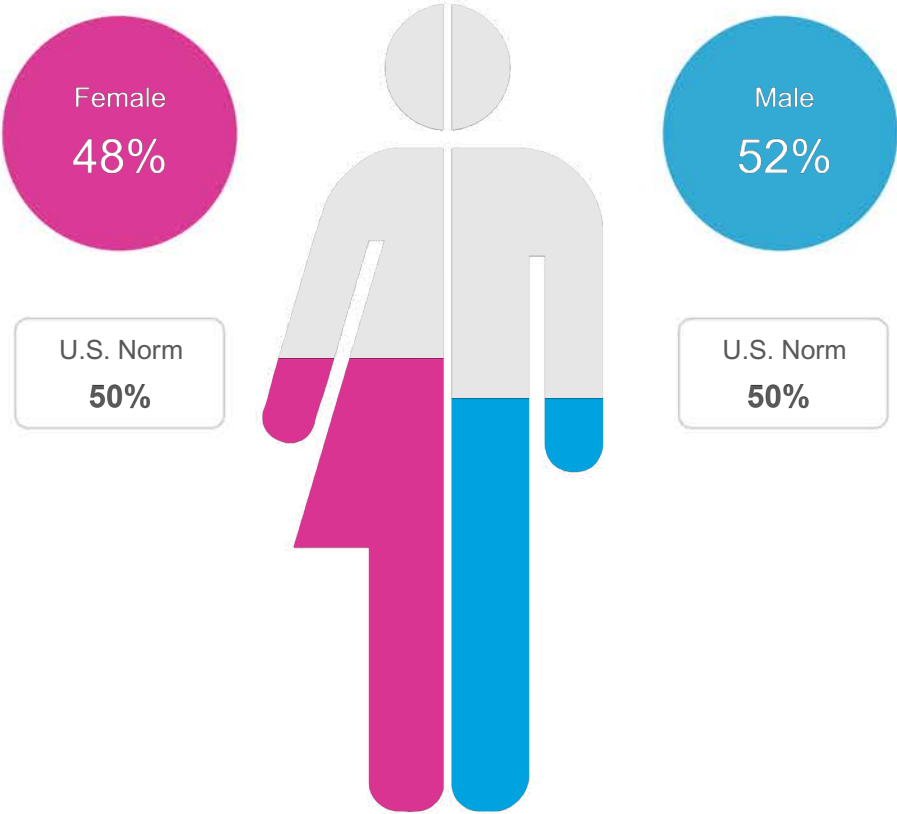
South Central



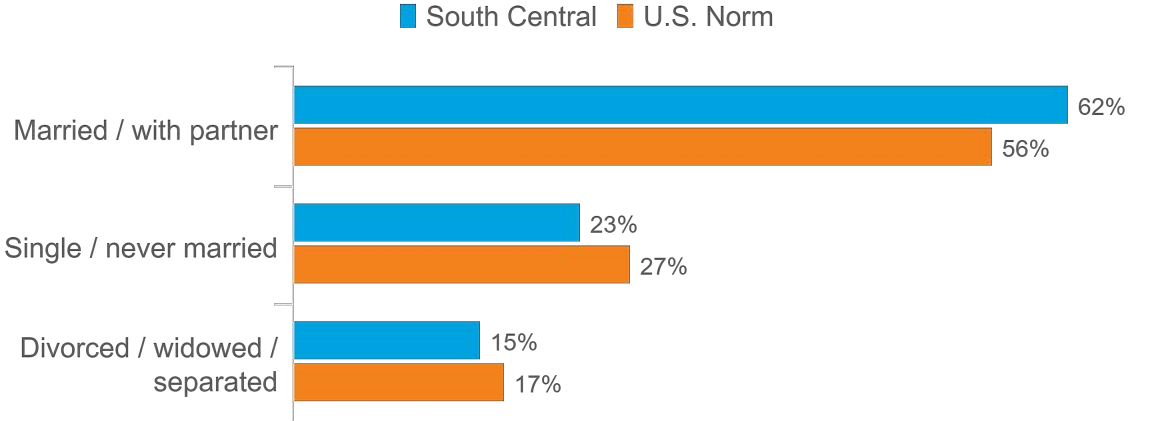
U.S. Norm



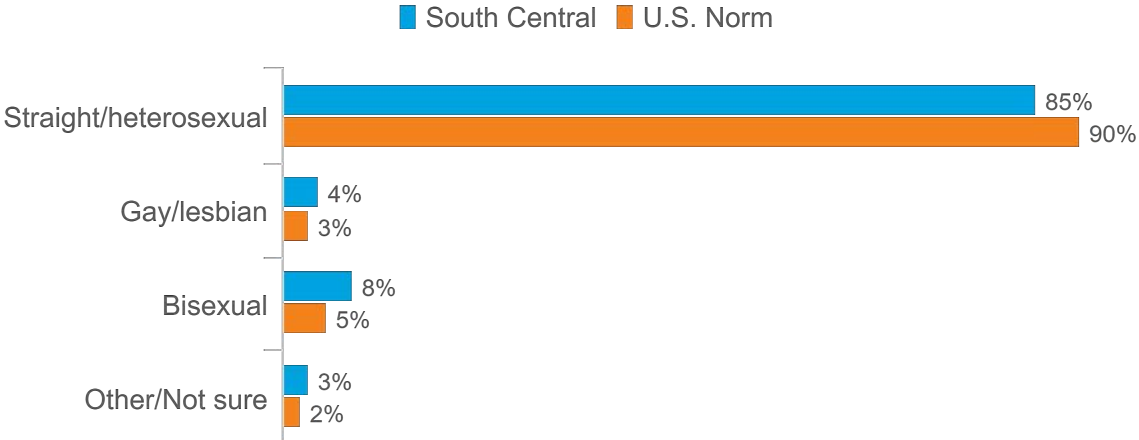
Gender



Marital Status



Sexual Orientation

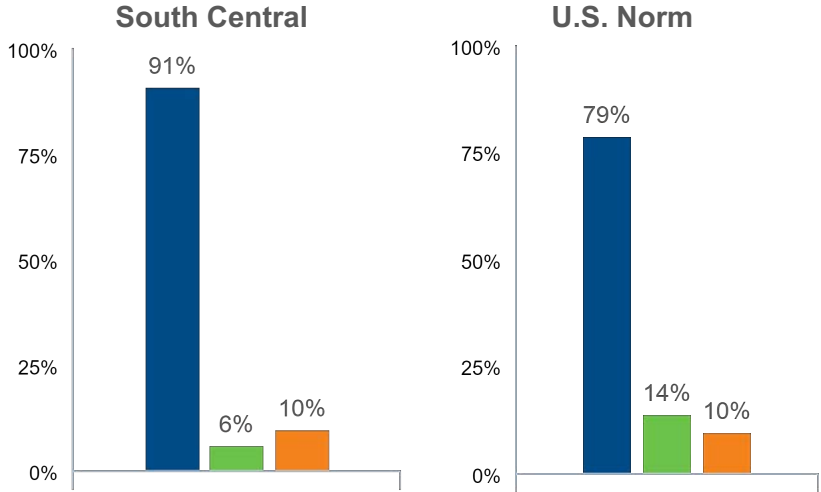


Demographic Profile of Overnight South Central Visitors

Base: 2022/2023 Overnight Person-Trips

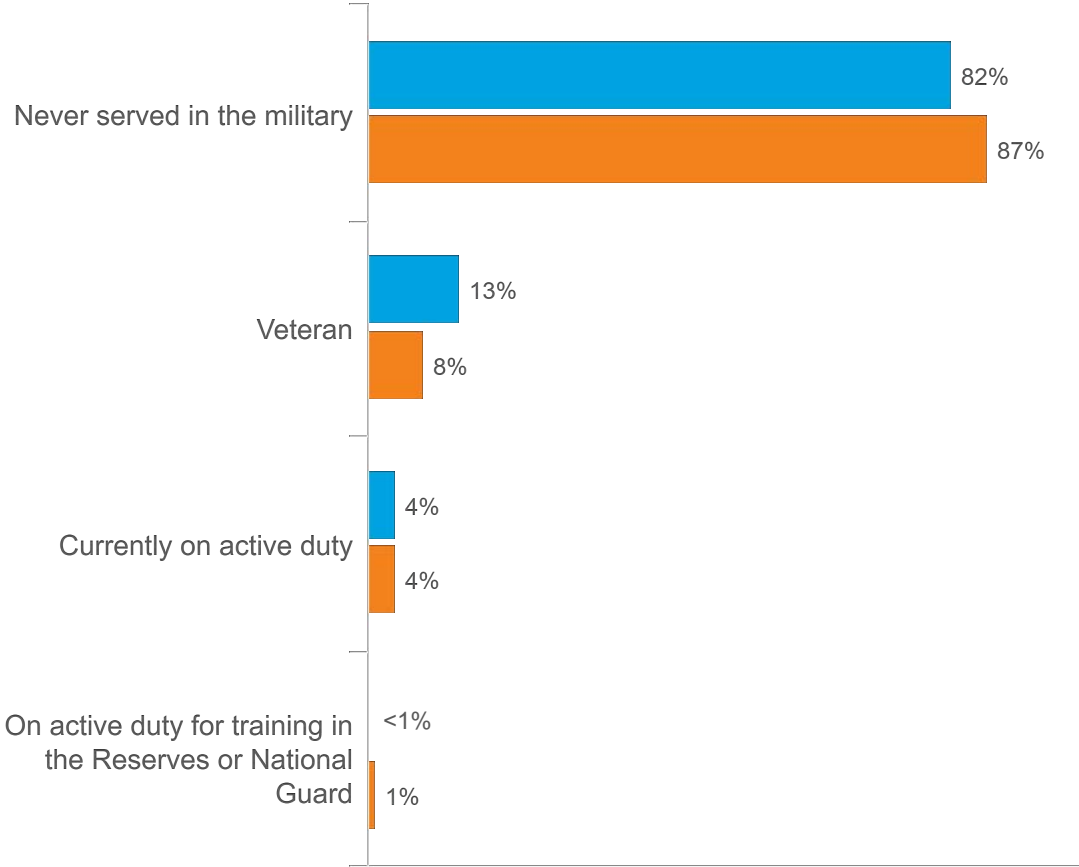
Race

White African-American Other



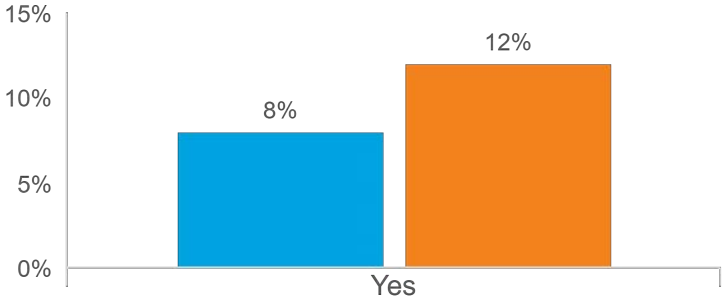
Military Status

South Central U.S. Norm

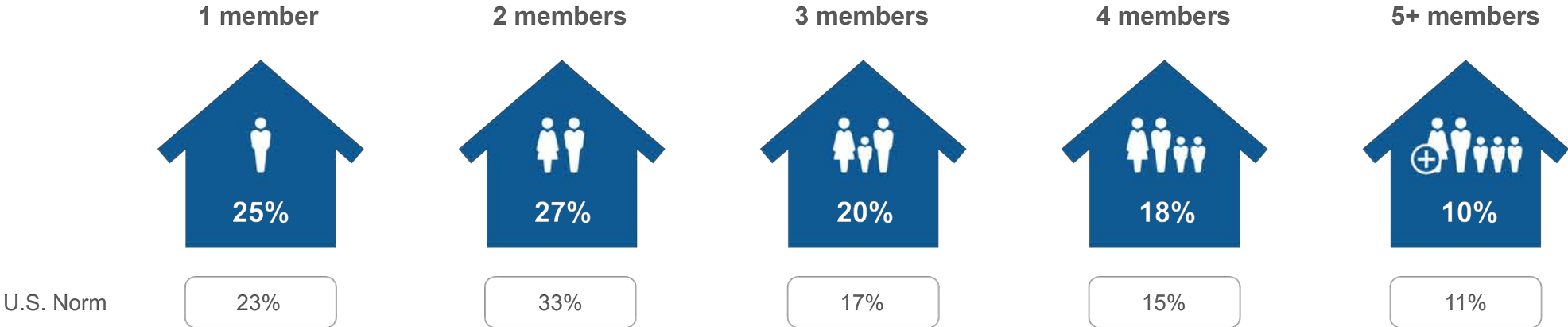


Hispanic Background

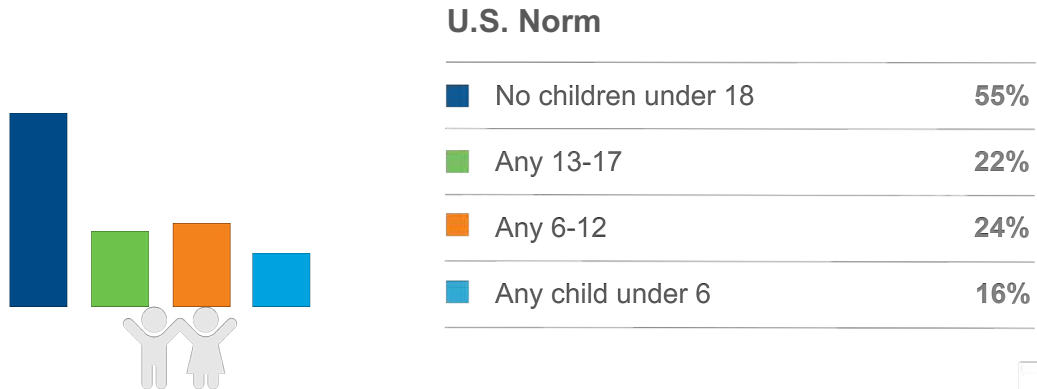
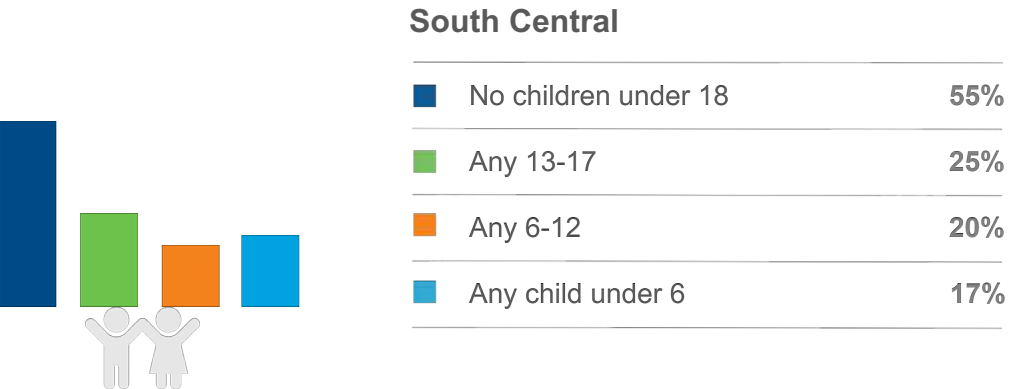
South Central U.S. Norm



Household Size



Children in Household





Travel USA Visitor Profile

Overnight Visitation: Southwestern Region



2022/2023

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- 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.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2022 and 2023 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes represent 2023 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

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 **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Southwestern, the following sample was achieved in 2022/2023:



Overnight Base Size

526

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

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

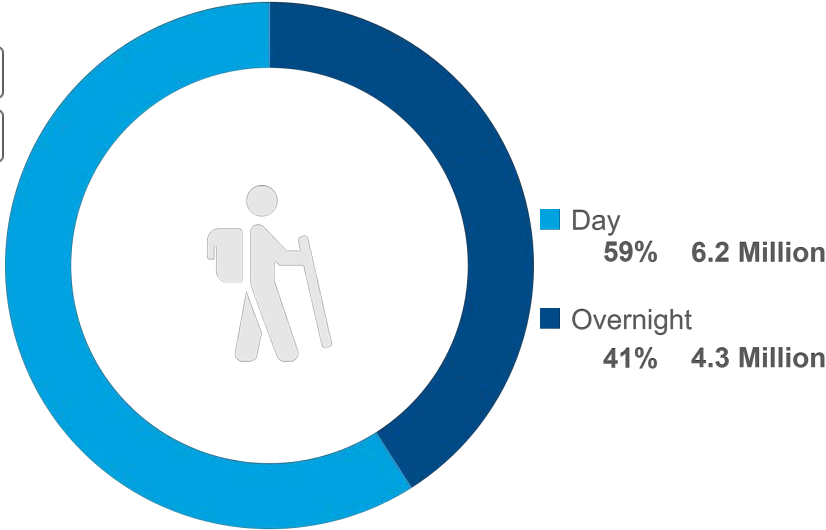
Total Size of Southwestern 2023 Domestic Travel Market

Total Person-Trips

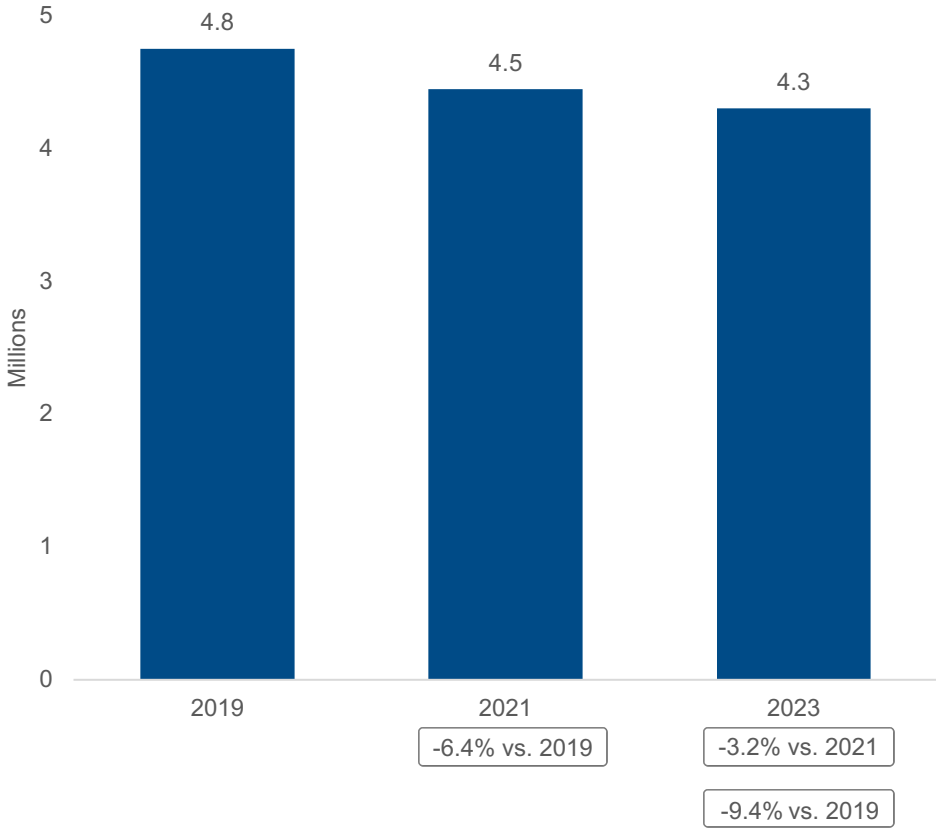
10.5 Million

+3.1% vs. 2021

-3.5% vs. 2019



Overnight Trips to Southwestern














Past Visitation to Southwestern

Base: 2022/2023 Overnight Person-Trips

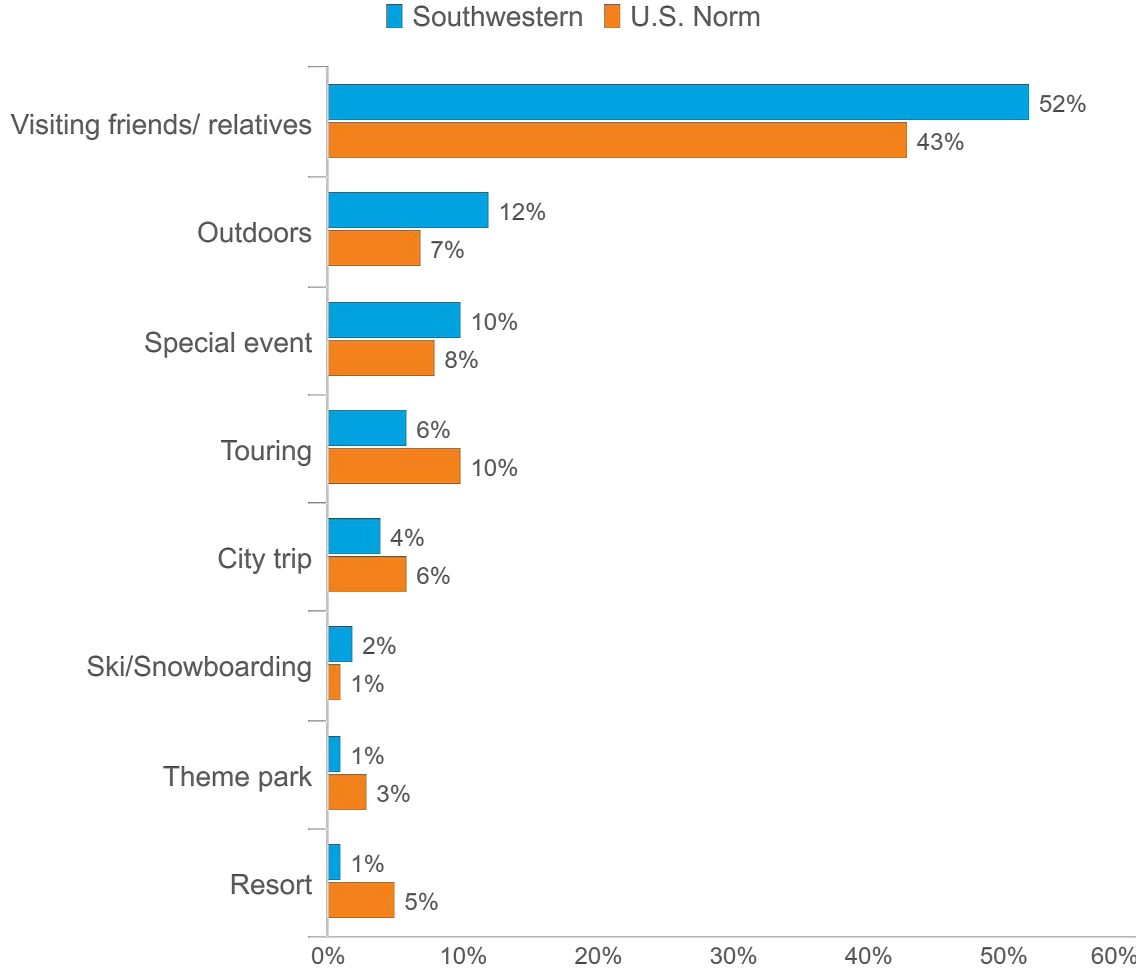
79% of overnight travelers to Southwestern are repeat visitors

60% of overnight travelers to Southwestern had visited before in the past 12 months

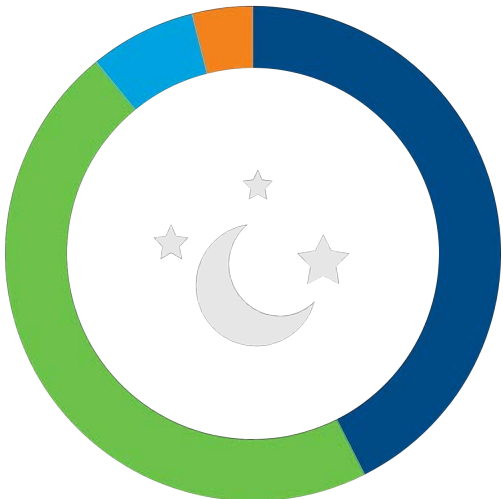
Main Purpose of Trip

 52% Visiting friends/ relatives	
 12% Outdoors	 3% Conference/ Convention
 10% Special event	
 6% Touring	
 4% City trip	
 2% Ski/Snowboarding	 5% Other business trip
 1% Theme park	
 1% Resort	 3% Business-Leisure

Main Purpose of Leisure Trip



2023 U.S. Overnight Trips



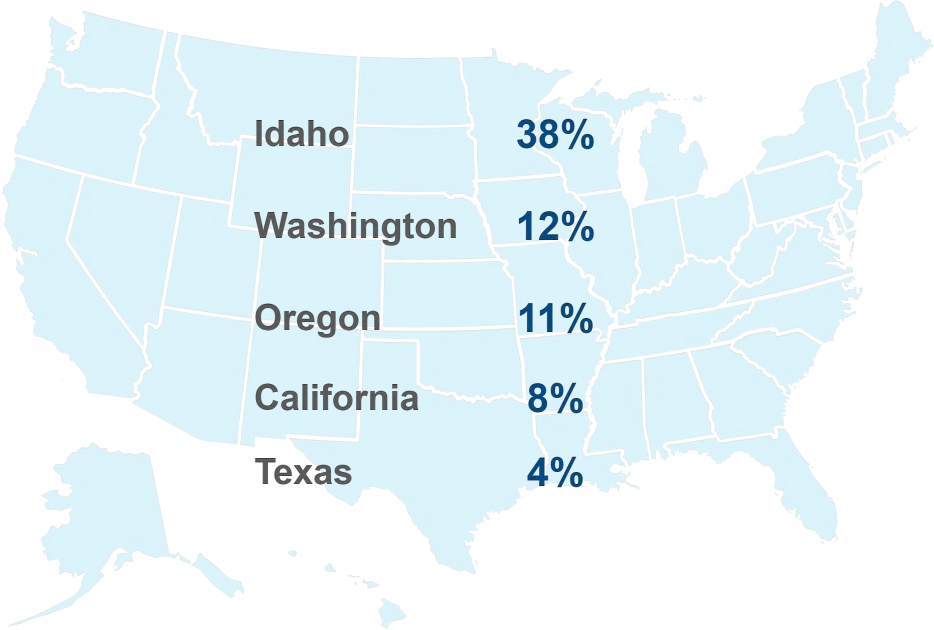
■ Visiting friends/relatives	43%
■ Marketable	47%
■ Business	7%
■ Business-leisure	4%

Southwestern Overnight Trips

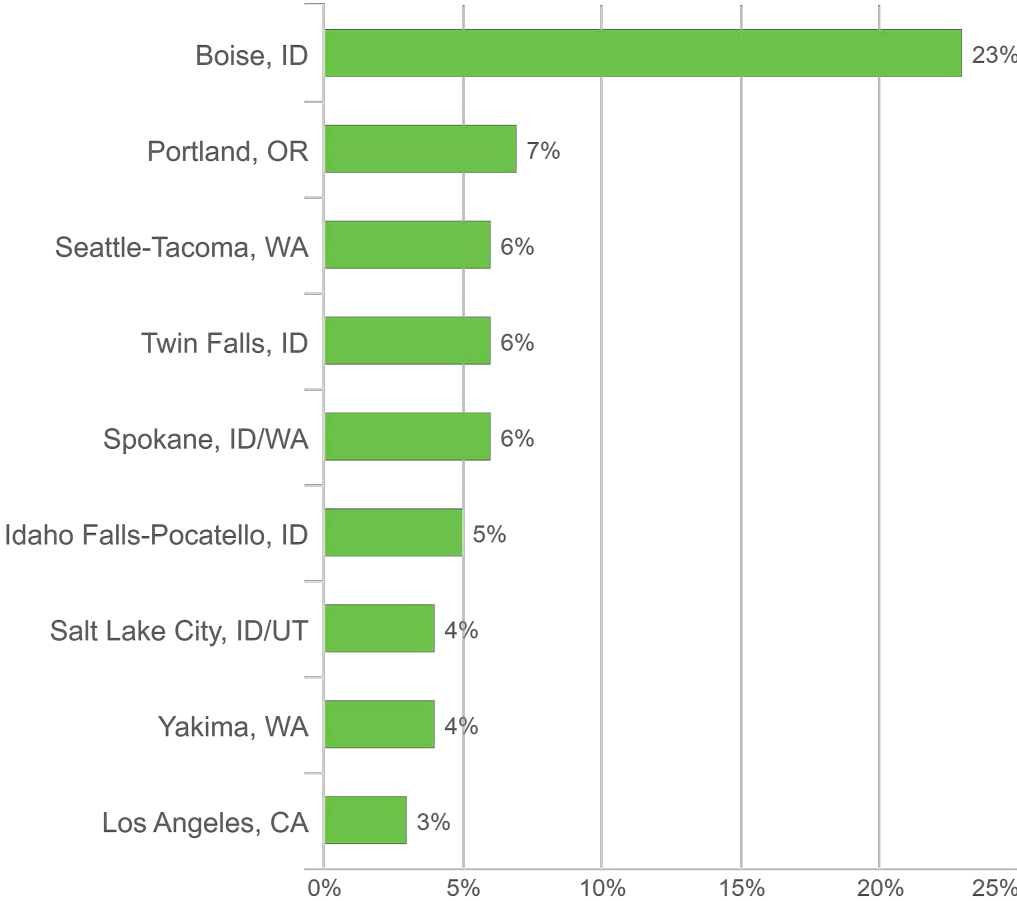


■ Visiting friends/relatives	52%
■ Marketable	37%
■ Business	8%
■ Business-leisure	3%

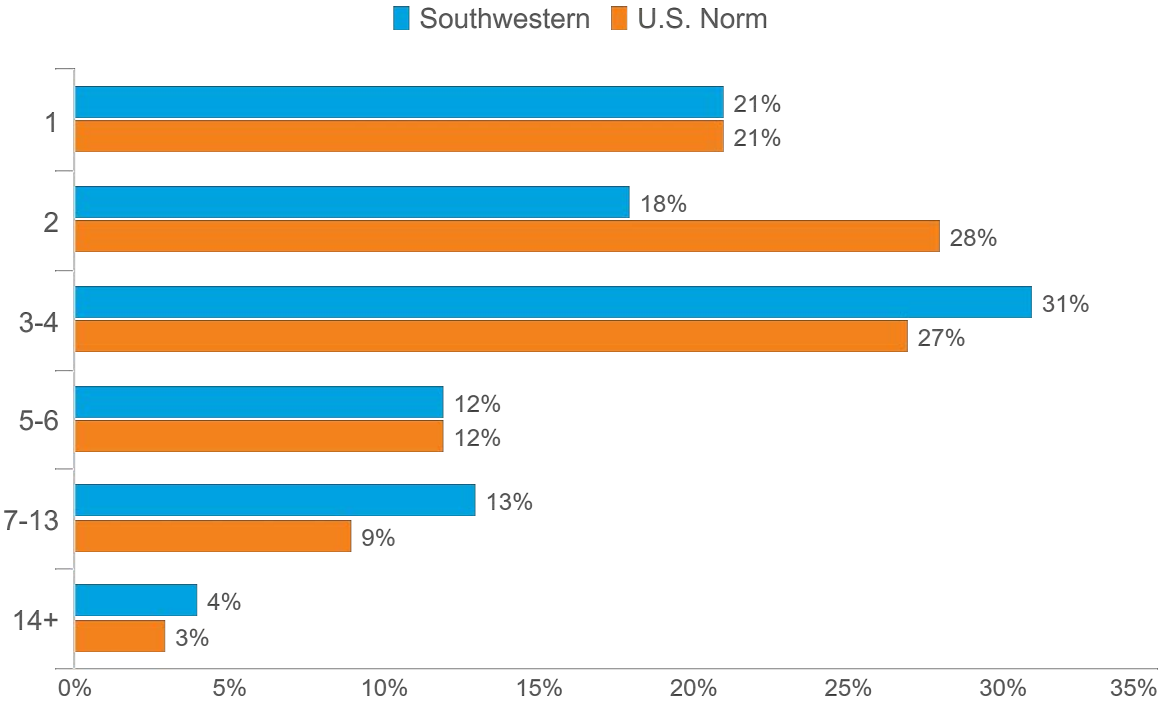
State Origin Of Trip



DMA Origin Of Trip



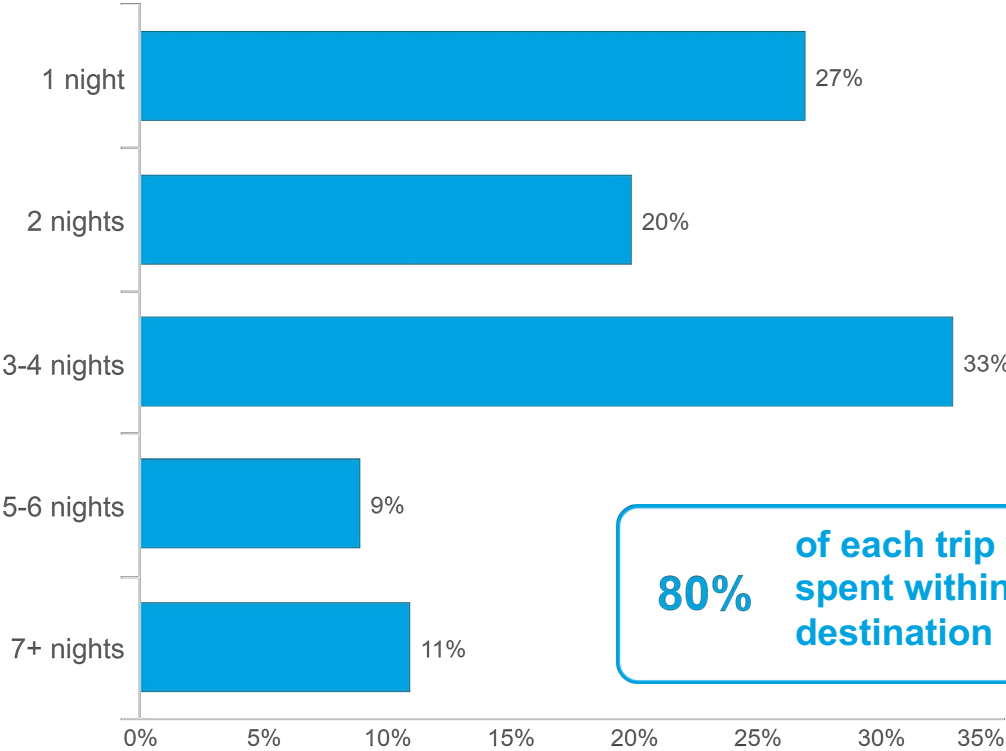
Total Nights Away on Trip



Southwestern
4.2
Average Nights

U.S. Norm
3.8
Average Nights

Nights Spent in Southwestern



80% of each trip was spent within the destination

Average number of nights
3.3

Size of Travel Party

■ Adults ■ Children

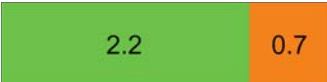
Southwestern



Average number of people

Total
2.9

U.S. Norm



Average number of people

Total
2.9

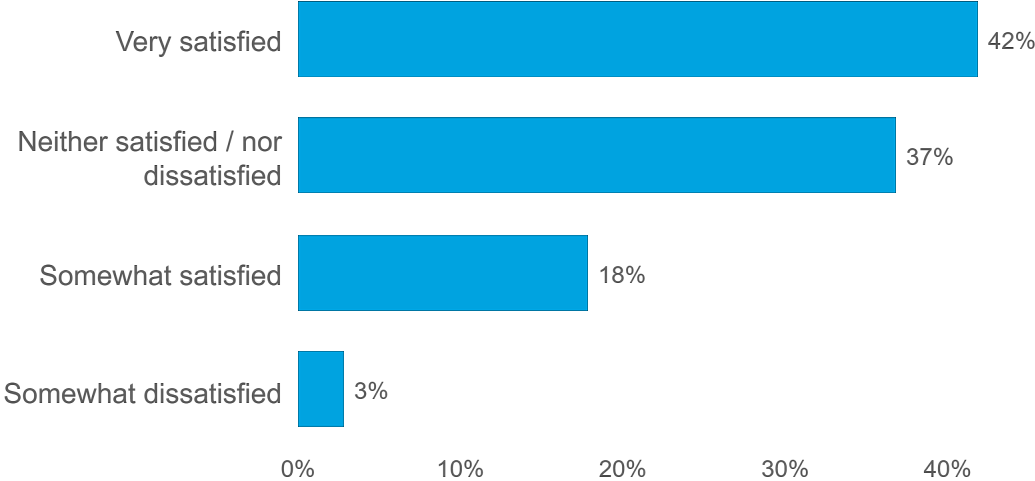


15% of travel parties had a travel party member that required accessibility services

U.S. Norm: 17%

Satisfaction with Ease of Accessibility

Ease of Accessibility only asked to those with travel limiting disabilities within travel party



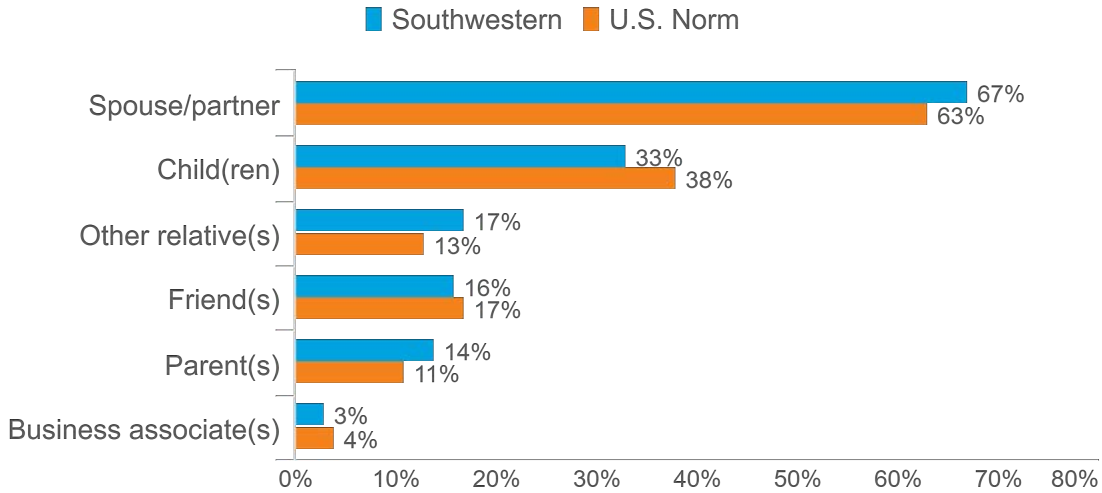


30% of trips only had one person in the travel party

U.S. Norm: 24%

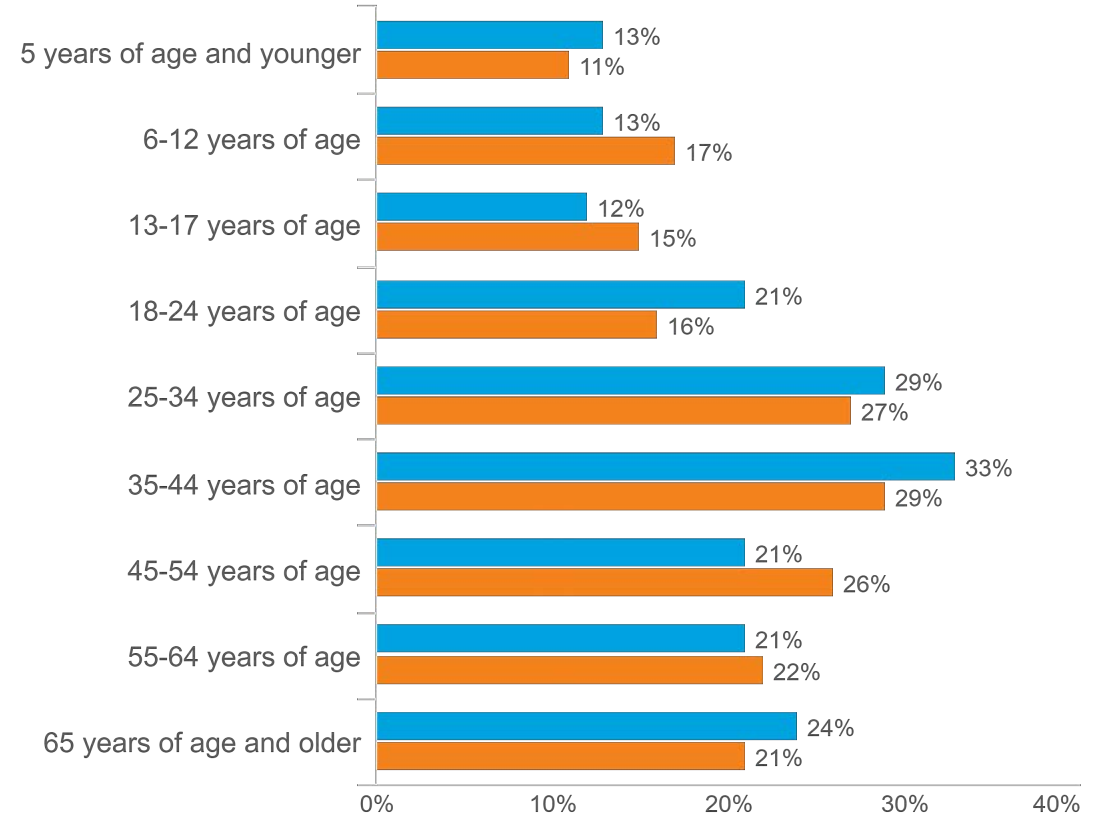
Composition of Immediate Travel Party

Base: 2023 Overnight Person-Trips that included more than one person



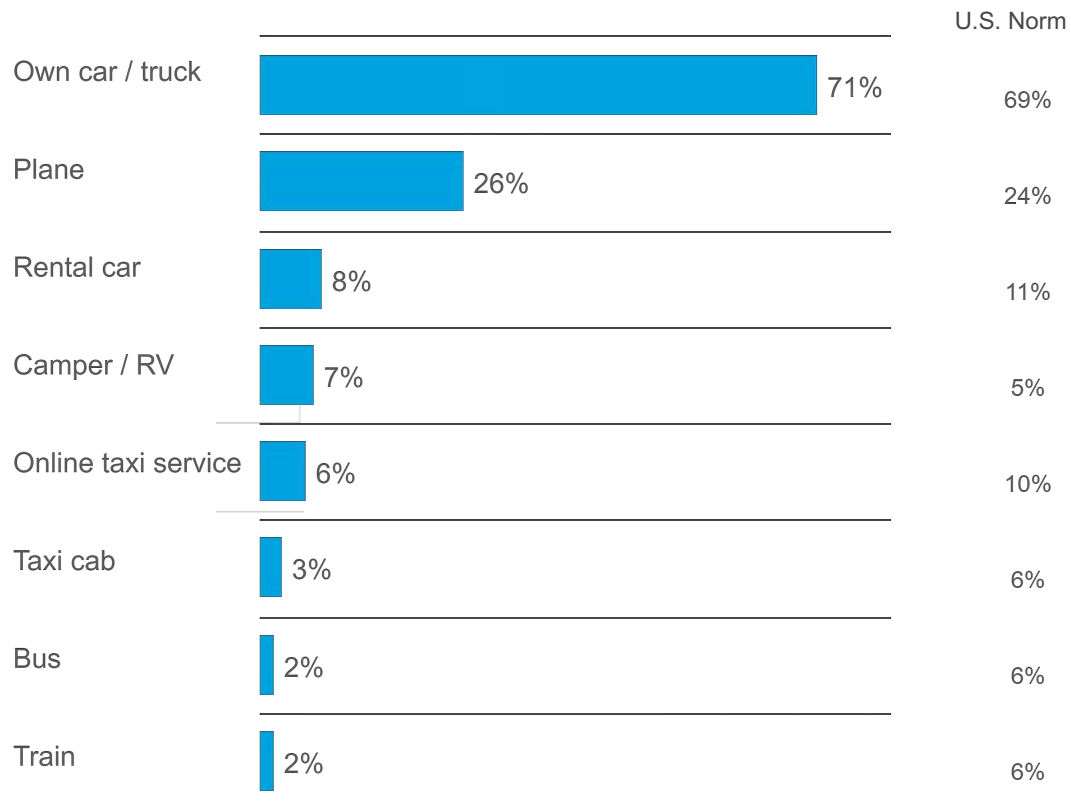
Travel Party Age

■ Southwestern ■ U.S. Norm



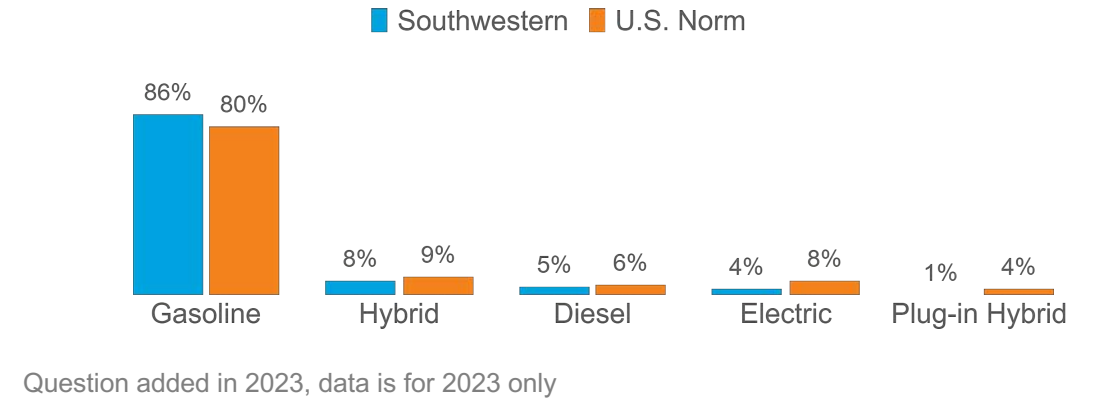
Question added in 2023, data is for 2023 only

Transportation Used to get to Destination

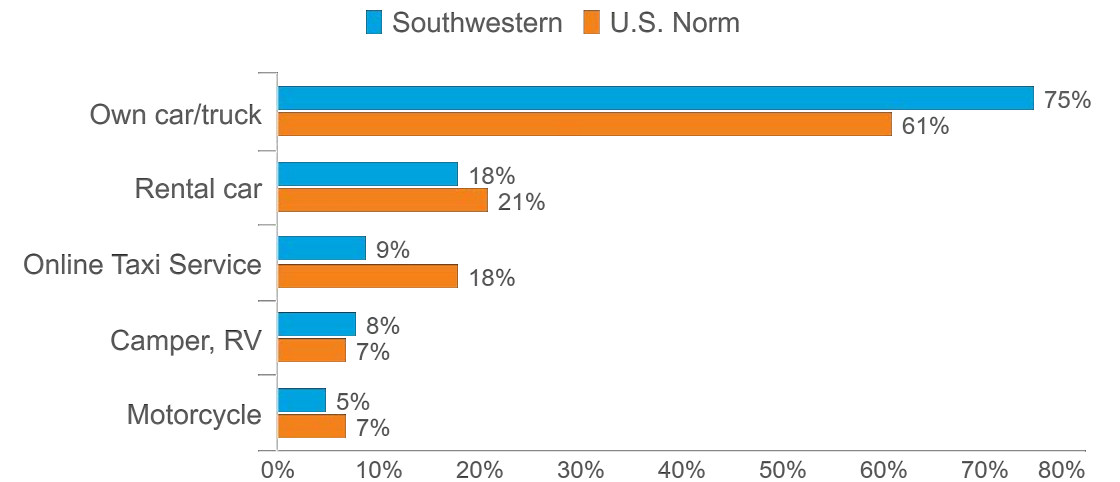


Question updated in 2020

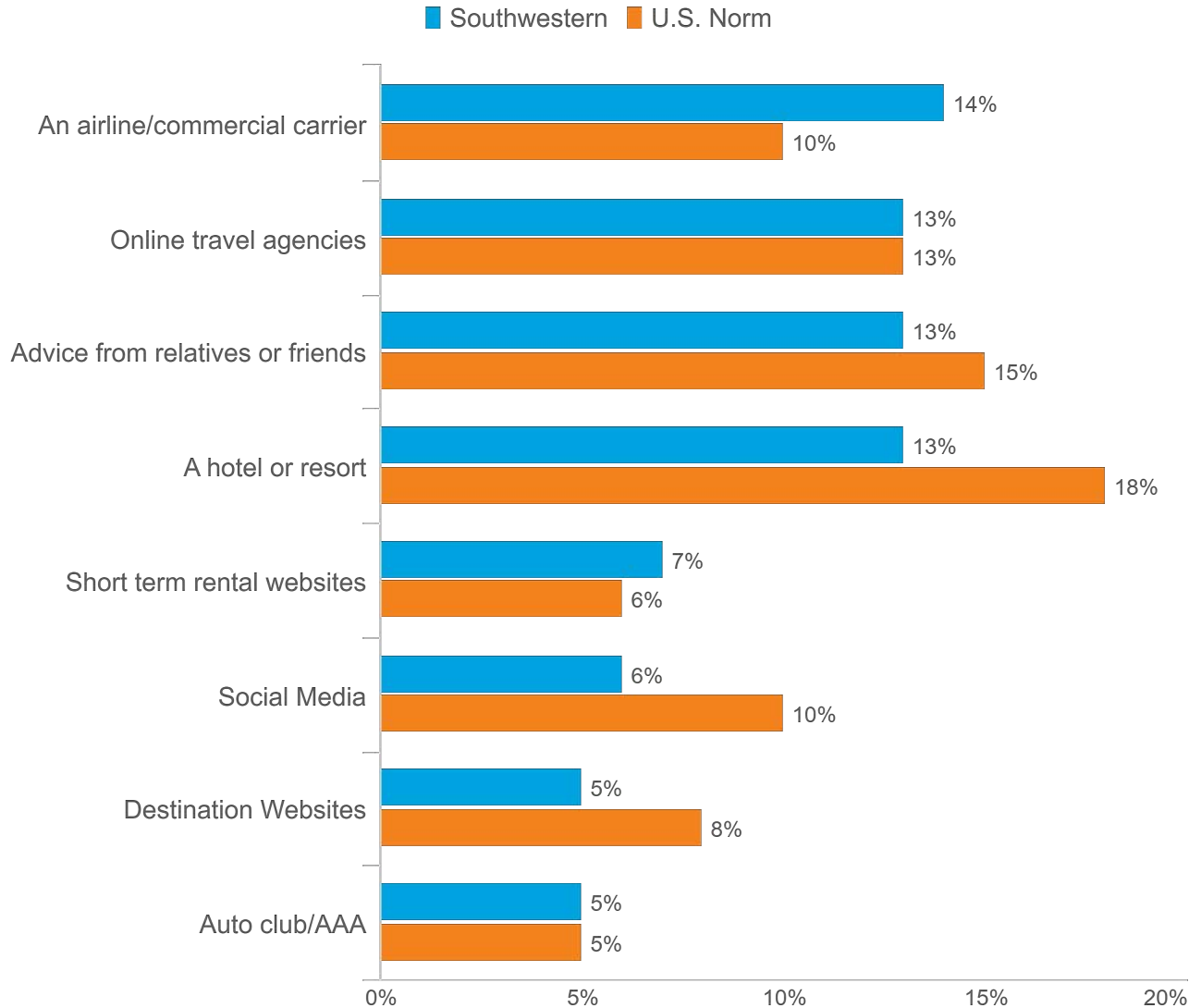
Type of Vehicle Used to get to Destination



Transportation Used within Destination



Trip Planning Information Sources



Length of Trip Planning

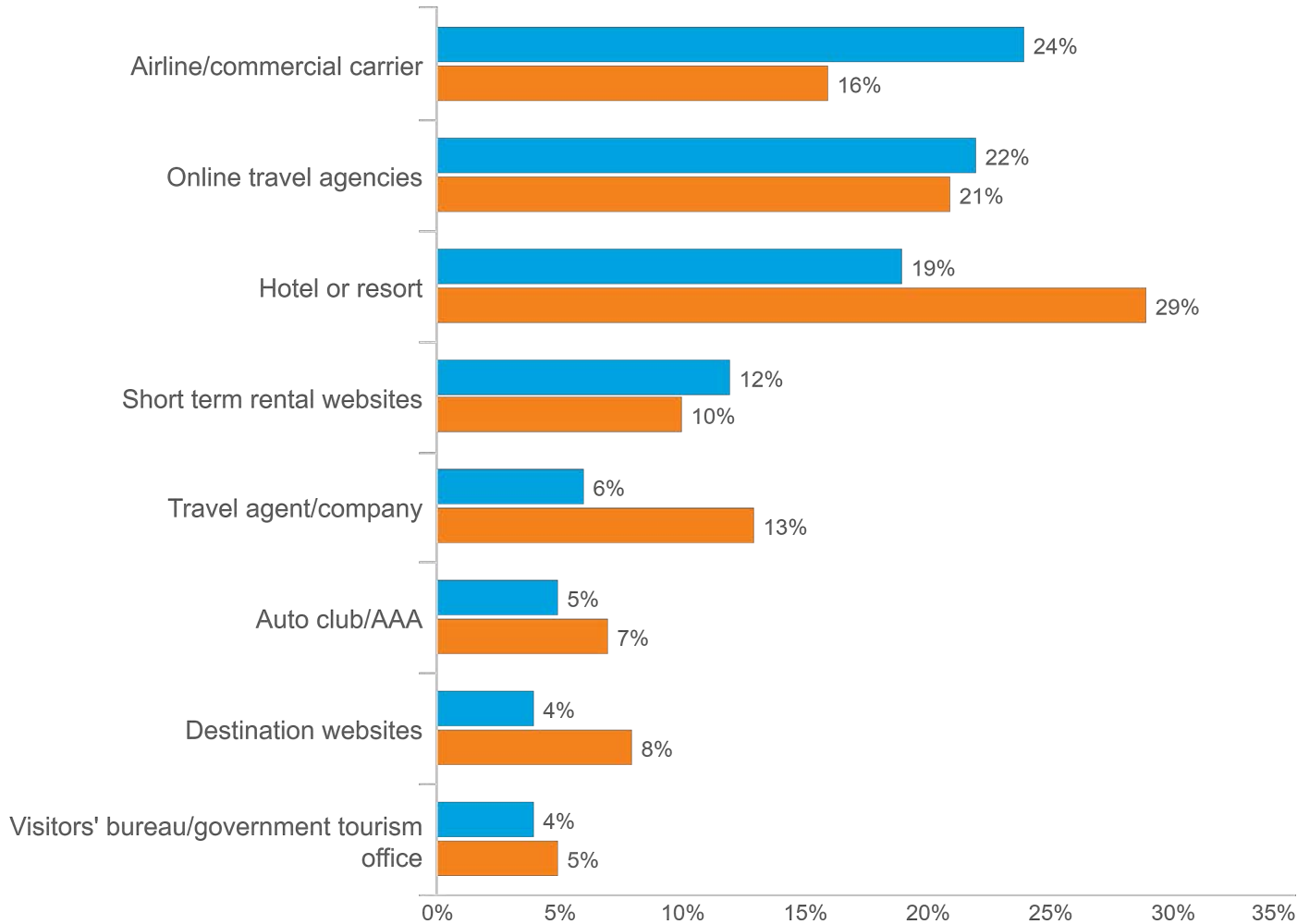
	Southwestern	U.S. Norm
Did not plan anything in advance	15%	15%
More than 1 year in advance	2%	4%
6-12 months	12%	13%
3-5 months	17%	18%
2 months	18%	17%
1 month or less	35%	33%

Southwestern's Overnight Trip Characteristics








Base: 2022/2023 Overnight Person-Trips

Method of Booking

■ Southwestern ■ U.S. Norm



Accommodations

	Southwestern	U.S. Norm
 Home of friends / relatives	36%	22%
 Hotel	30%	42%
 Motel	14%	11%
 Rented home / condo / apartment	10%	7%
 Campground / RV park	8%	5%
 Own condo / apartment / cabin / second home	5%	4%
 Rented cottage / cabin	4%	4%

Activity Groupings

Outdoor Activities



U.S. Norm: 47%

Entertainment Activities



U.S. Norm: 54%

Cultural Activities



U.S. Norm: 28%

Sporting Activities



U.S. Norm: 20%

Business Activities



U.S. Norm: 15%

Activities and Experiences (Top 10)

	Southwestern	U.S. Norm
Shopping	27%	26%
Sightseeing	21%	20%
Attending celebration	19%	15%
Local parks/playgrounds	15%	10%
Bar/nightclub	15%	15%
Hiking/backpacking	11%	8%
Landmark/historic site	11%	13%
National/state park	11%	8%
Swimming	10%	14%
Museum	10%	11%







Shopping Types on Trip

Base: 2023 Overnight Person-Trips that included Shopping

		Southwestern	U.S. Norm
	Convenience/grocery shopping	53%	42%
	Outlet/mall shopping	52%	44%
	Shopping at locally owned businesses	44%	48%
	Big box stores (Walmart, Costco)	40%	30%
	Souvenir shopping	29%	38%
	Farmers market	11%	17%
	Antiquing	9%	12%

Question updated in 2023, data is for 2023 only

Dining Types on Trip

		Southwestern	U.S. Norm
	Casual dining	60%	56%
	Fast food	51%	45%
	Unique/local food	24%	30%
	Carry-out/food delivery service	21%	22%
	Picnicking	14%	11%
	Fine/upscale dining	14%	19%

Question updated in 2023, data is for 2023 only



72%
of overnight travelers were
very satisfied with their overall
trip experience



Safety/security



Friendliness of people



Sightseeing/attractions



Quality of accommodations



Quality of food



Cleanliness



Value for money



Music/nightlife/entertainment



Public transportation



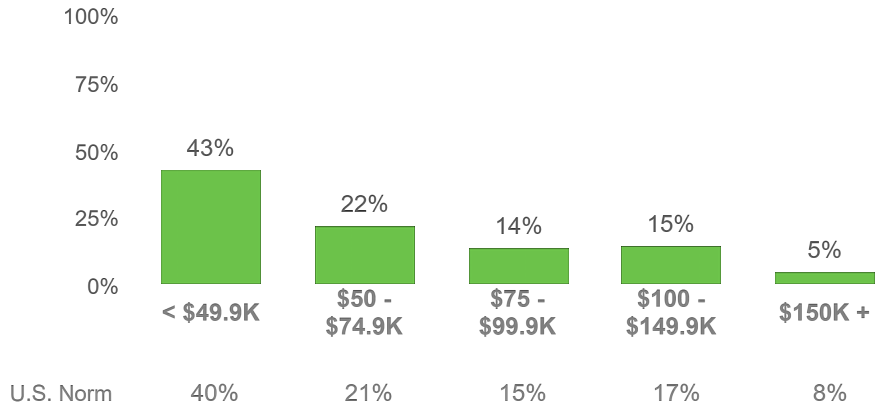
0% 10% 20% 30% 40% 50% 60% 70% 80%

*Very Satisfied = selected top box on a five point scale

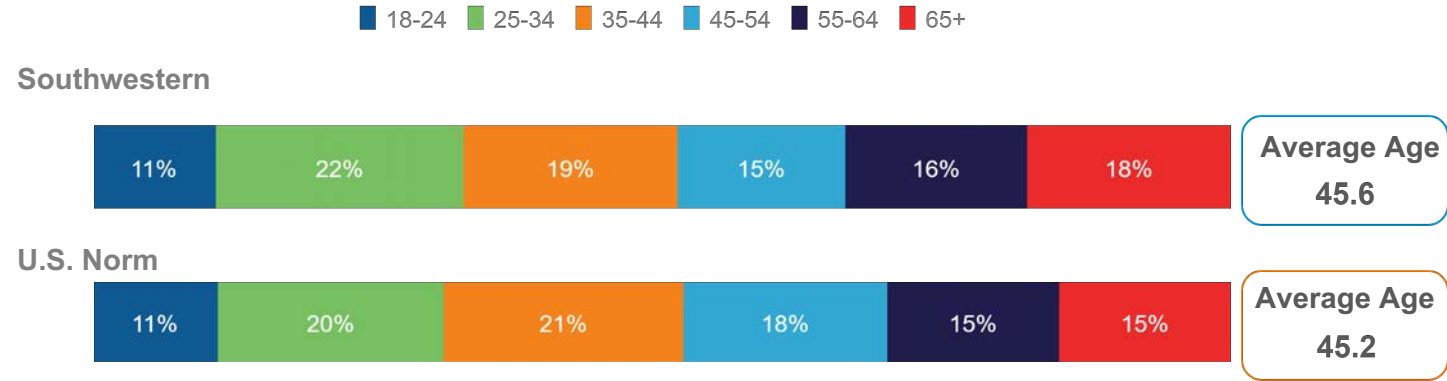
Demographic Profile of Overnight Southwestern Visitors

Base: 2022/2023 Overnight Person-Trips

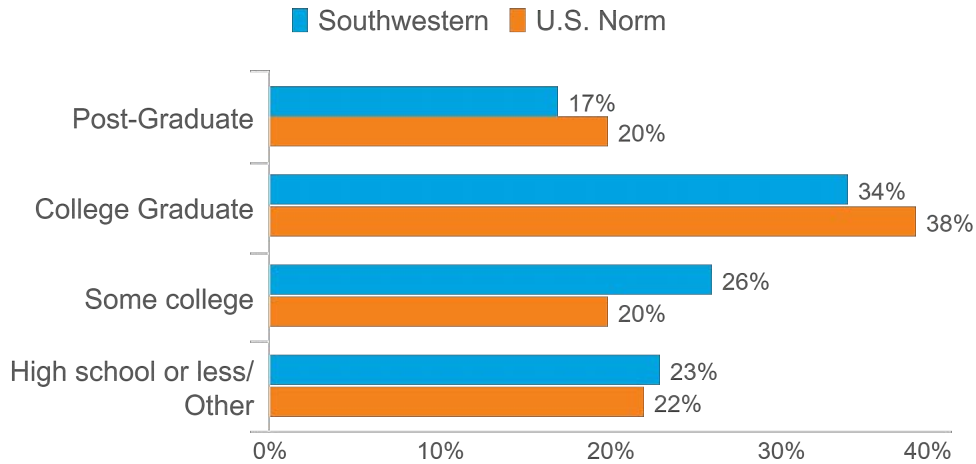
Household Income



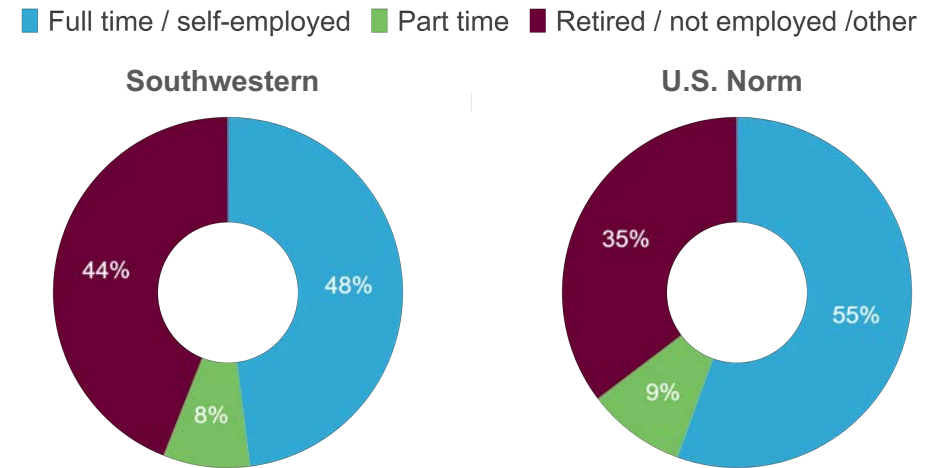
Age



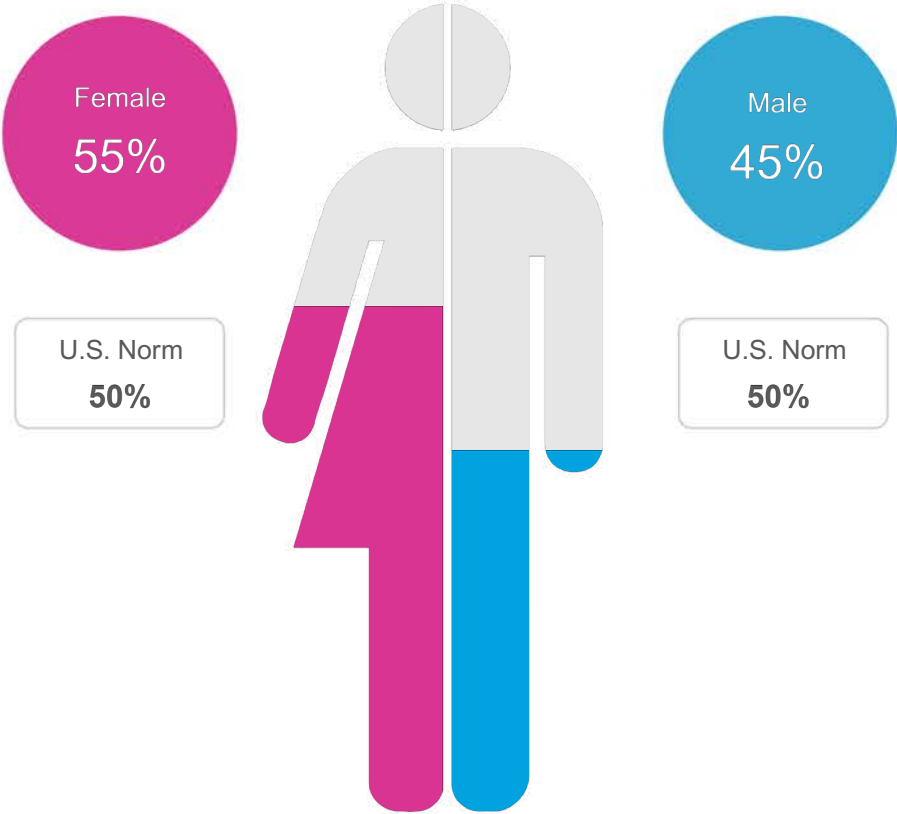
Educational Attainment



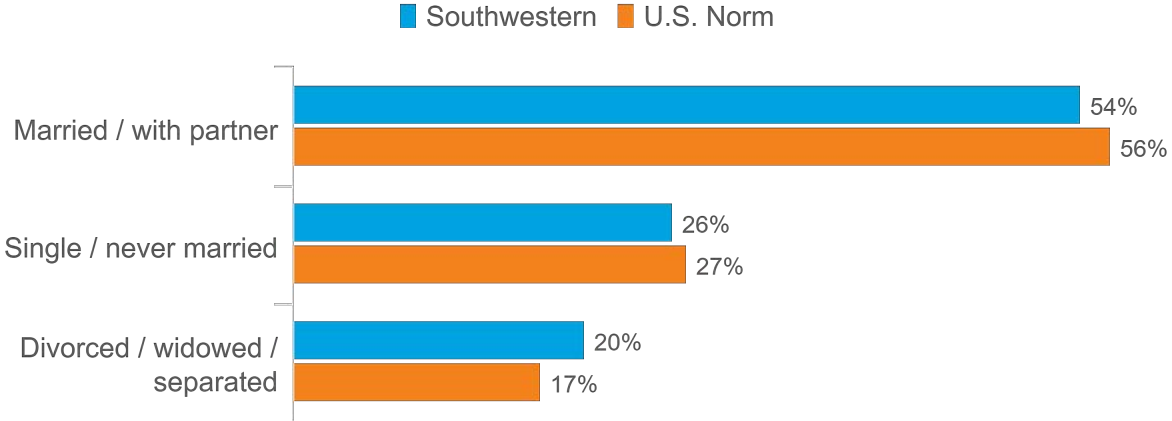
Employment



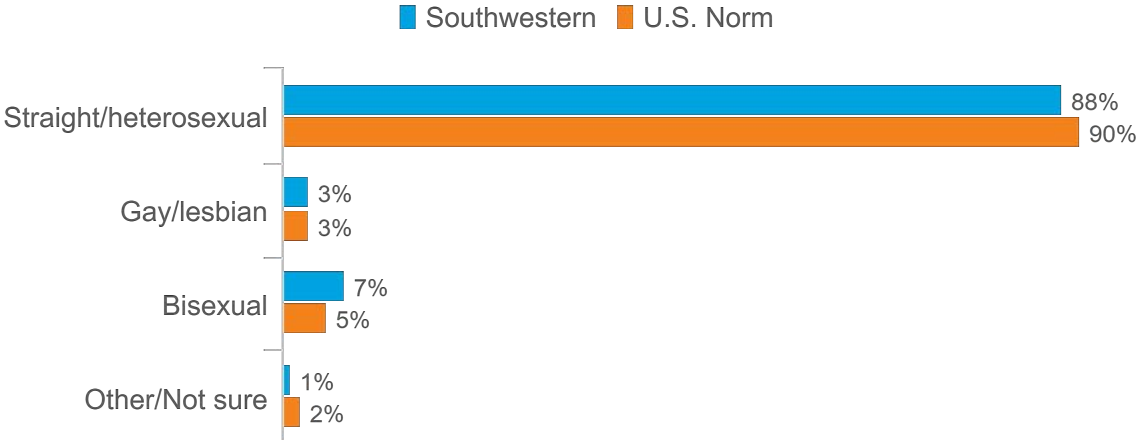
Gender



Marital Status



Sexual Orientation

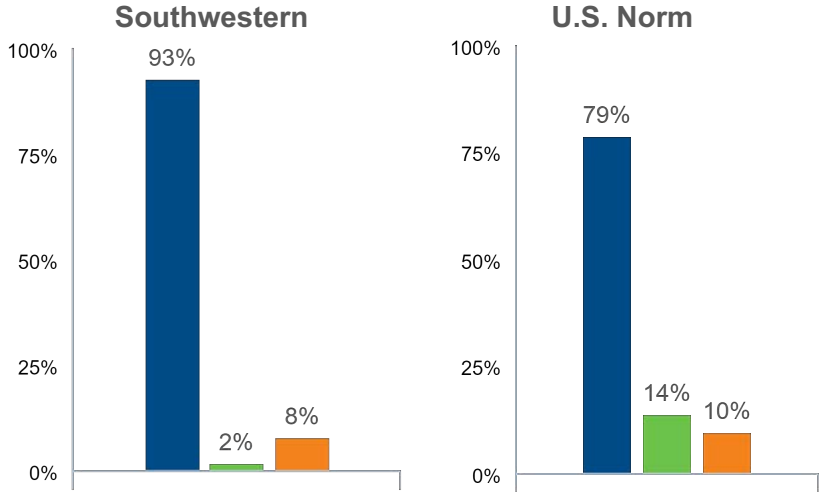


Demographic Profile of Overnight Southwestern Visitors

Base: 2022/2023 Overnight Person-Trips

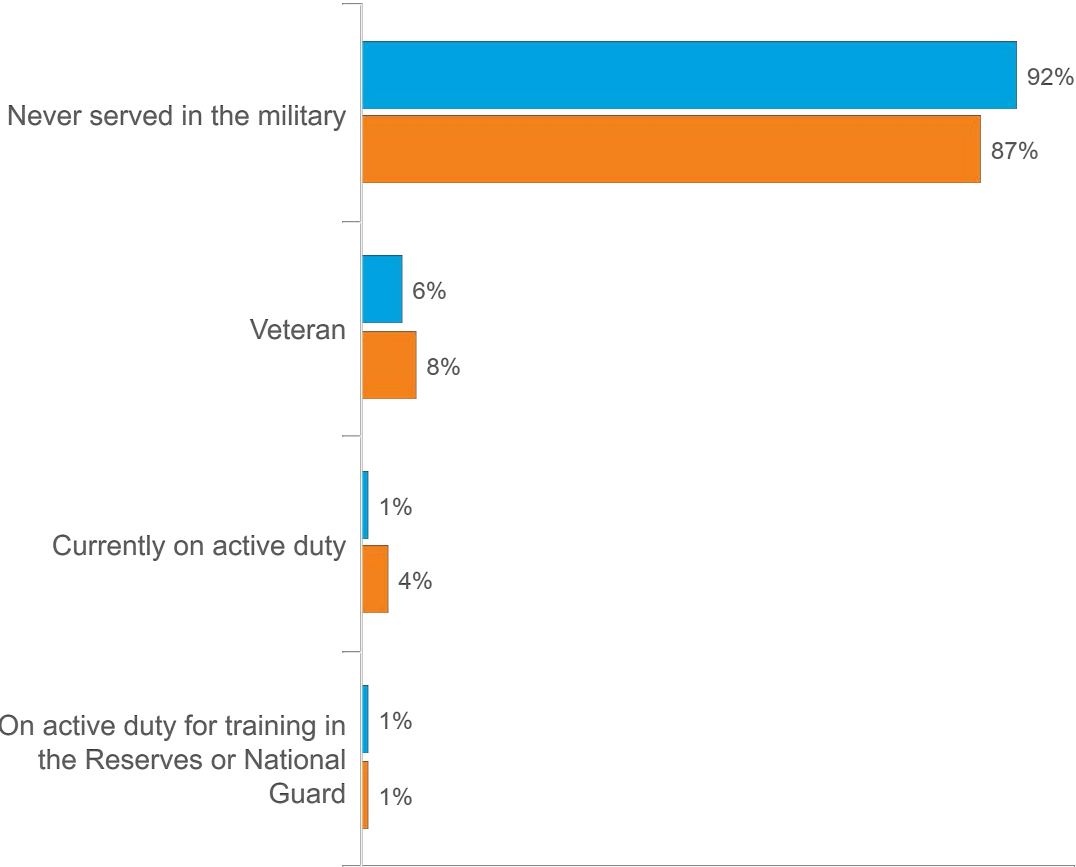
Race

White African-American Other



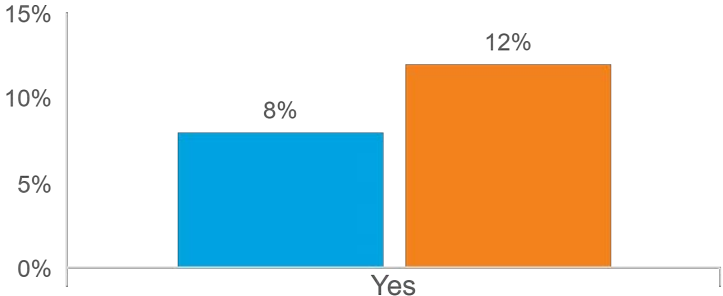
Military Status

Southwestern U.S. Norm

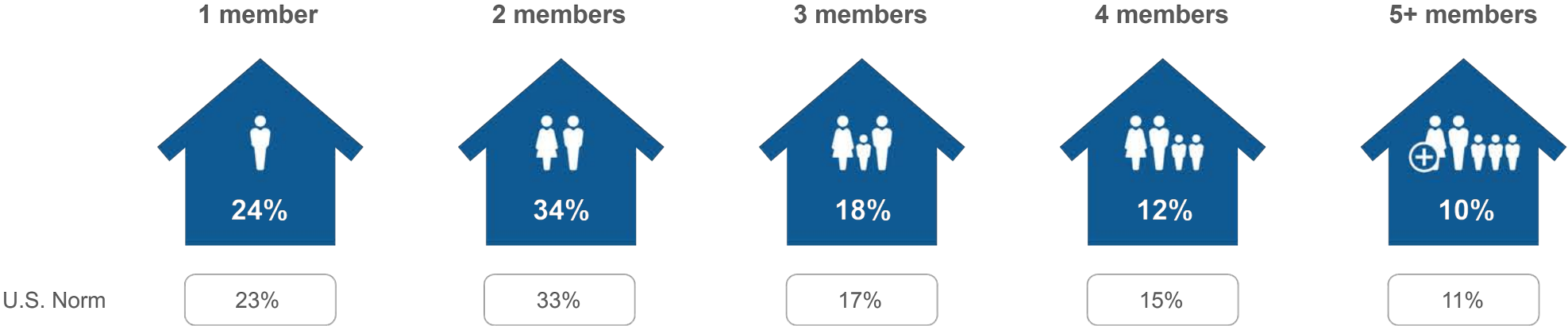


Hispanic Background

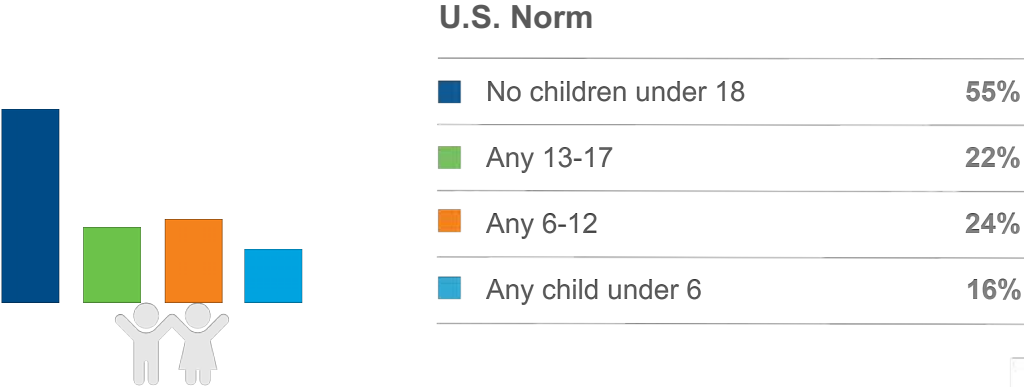
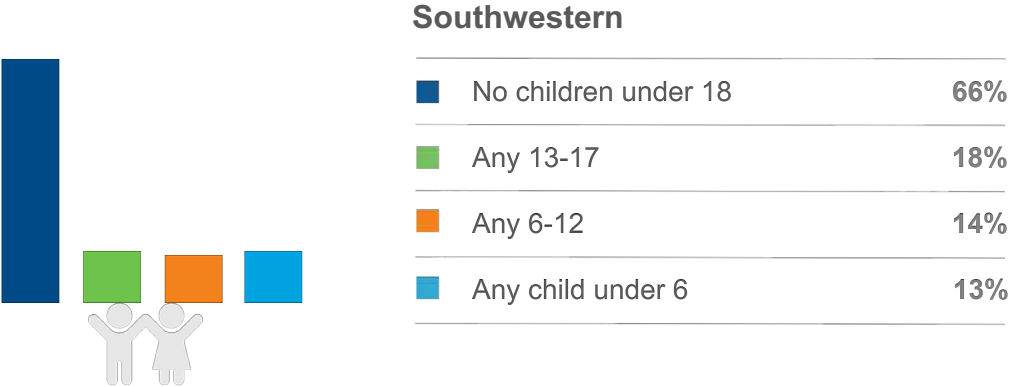
Southwestern U.S. Norm



Household Size



Children in Household



C  M P A S S

Longwoods
INTERNATIONAL