



Longwoods
Travel USA®

Louisville, KY

2015 Visitor Report

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Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides an overview for Louisville's **domestic** tourism business in 2015.

Research Objectives



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

Methodology



- ◉ Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Travel USA®** survey:
 - ◉ *Selected to be representative of the U.S. adult population*
- ◉ For the 2015 travel year, this yielded :
 - ◉ 337,164 trips for analysis nationally:
 - ◉ 237,555 overnight trips
 - ◉ 99,609 day trips
- ◉ For Louisville, the following sample was achieved in 2015:
 - ◉ 1,341 trips:
 - ◉ 772 overnight trips
 - ◉ 569 day trips
- ◉ For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings

Key Findings



- In 2015, Louisville had 24.2 million person trips, increasing 4% from 2014. Of these trips, 33% were overnight trips. The rest were day trips.
- The overnight trips generated \$1.235 billion in spending, increasing 10% from 2014.
- “Visiting friends and relatives” (at 44%) was the most frequent purpose for an overnight trip to Louisville. Marketable trips (those influenced by marketing efforts) were 39% of the total overnight trips. Coming for a “special event such as fair, festival or sports event” was the highest marketable trip purpose.
- For overnight trips, the top state markets for Louisville visitors were Kentucky, Ohio, and Indiana. Among DMAs, the top three visitor sources were Lexington, Cincinnati and Louisville.

Key Findings



- Over two-thirds (67%) of Louisville visitors, were very satisfied with the overall trip experience. Most satisfaction elements were similar to the national average.
- Of the overnight respondents, 76% have visited Louisville at least once. Sixty-six (66%) percent had visited in the past year.
- Similar to the national average, over half (55%) of the overnight trips were planned 2 months or less before the trip. Also similar to the national average, twelve percent (12%) did not plan anything in advance.
- “Online travel agencies,” “Advice from relatives or friends,” “hotel or resort”, and “social media” were the most common planning sources for a Louisville overnight trip. “Online travel agencies” and “Hotel or resort” were the most common booking sources.

Key Findings – (Cont'd)



- The average number of nights spent in Louisville for an overnight trip was 2.5 nights, same as in 2014. The average travel party size was 2.9 persons.
- Eighty-percent (80%) of overnight Louisville travelers arrived by personal car or truck.
- The top five overnight trip Louisville activities and experiences were “Shopping,” “Fine Dining,” visiting a Landmark/Historic Site,” “Museum,” and “Bar/Disco.”
- The highest social media activities on an overnight trip to Louisville were “posting photos online,” “accessing the internet to learn about travel deals, news, events, or promotions,” “reading travel reviews,” and “looking at photos online.” The usage of social media on the overnight trip remained unchanged from 2014.

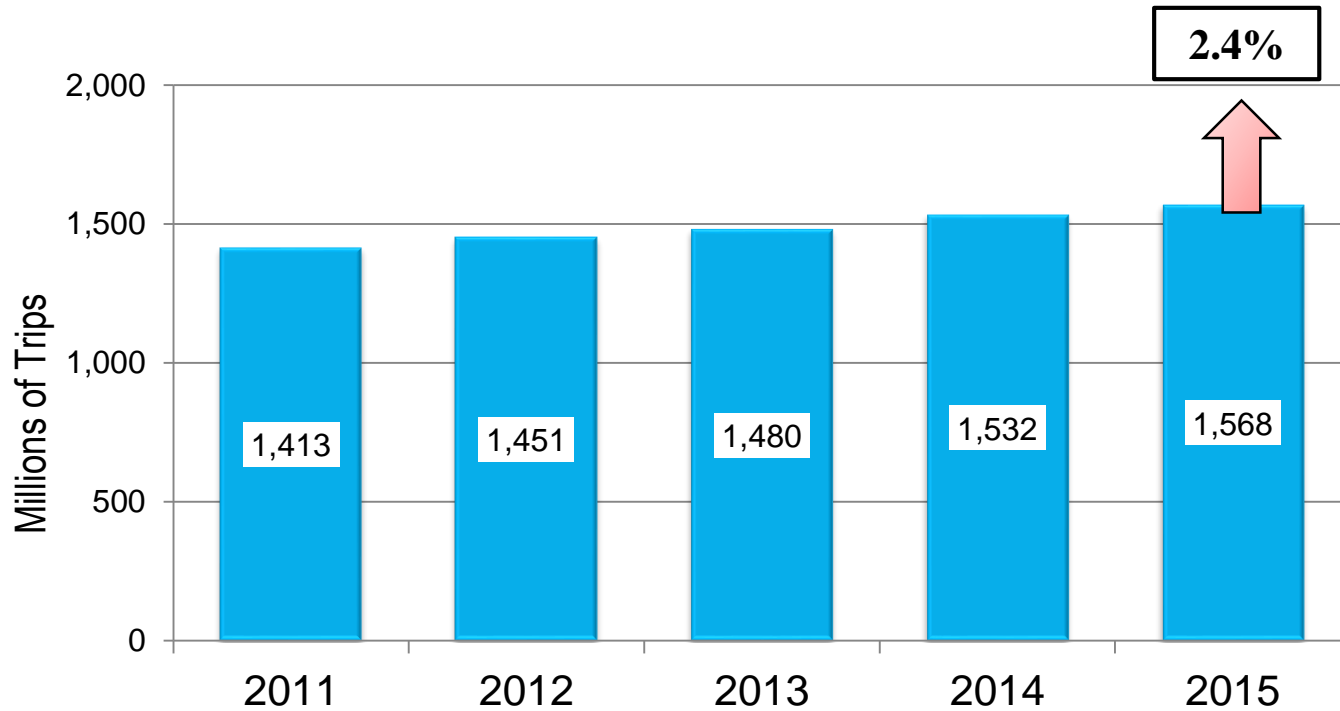


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



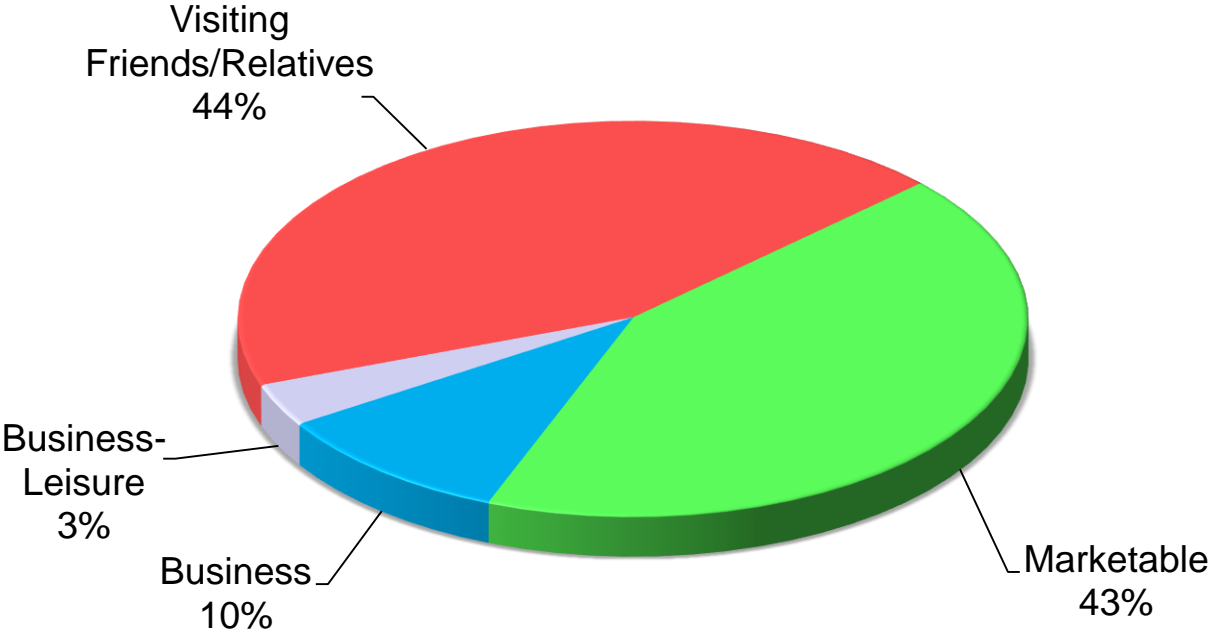
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2015 Overnight Trips



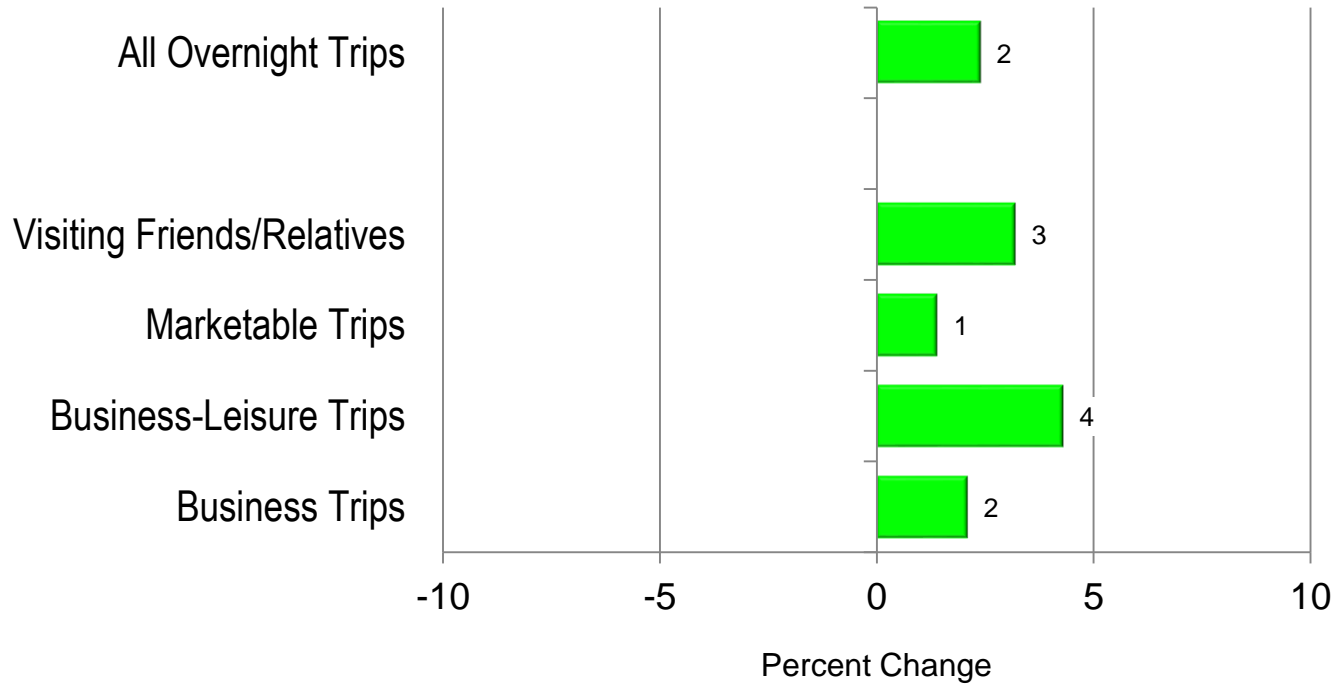
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2015 vs. 2014



Base: Total Overnight Person-Trips





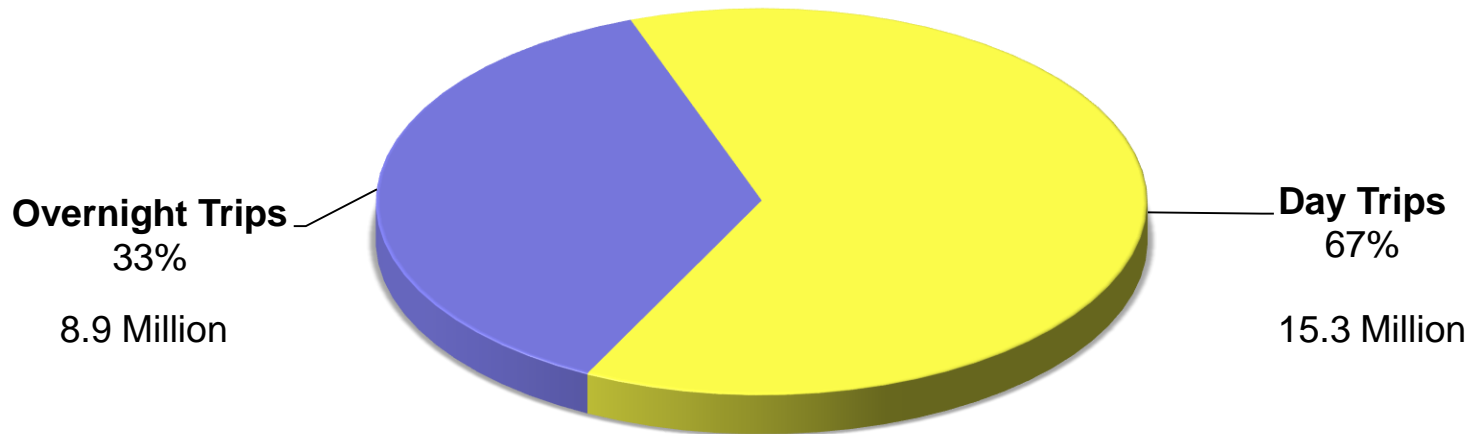
Size & Structure of Louisville Domestic Travel Market

Total Size of Louisville Domestic Travel Market in 2015



Total Person-Trips = 24.2 Million

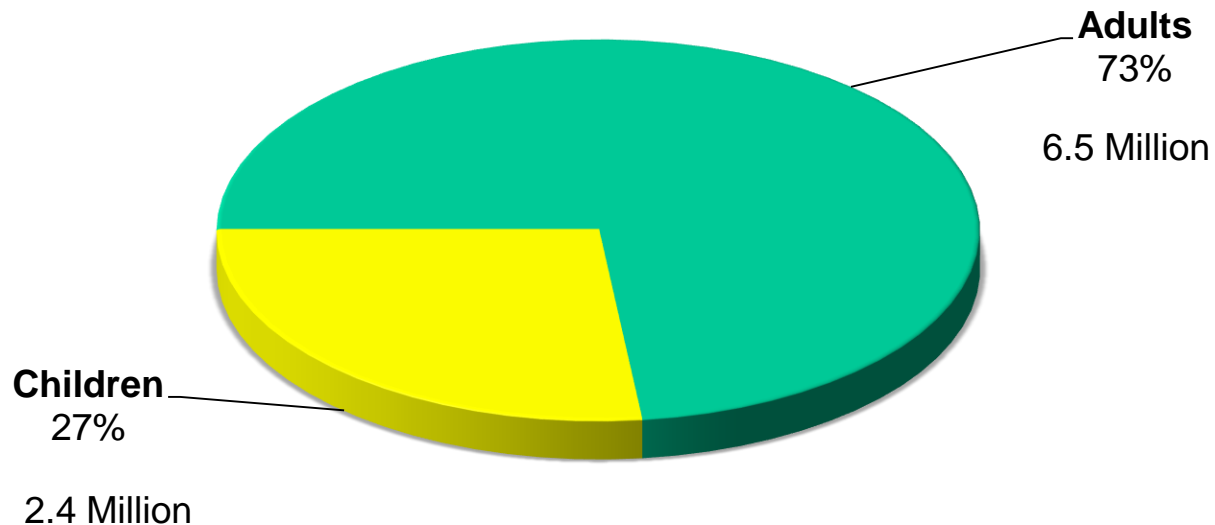
+5% vs. 2014



Size of Louisville Overnight Travel Market – Adults vs. Children



Total Overnight Person-Trips = 8.9 Million

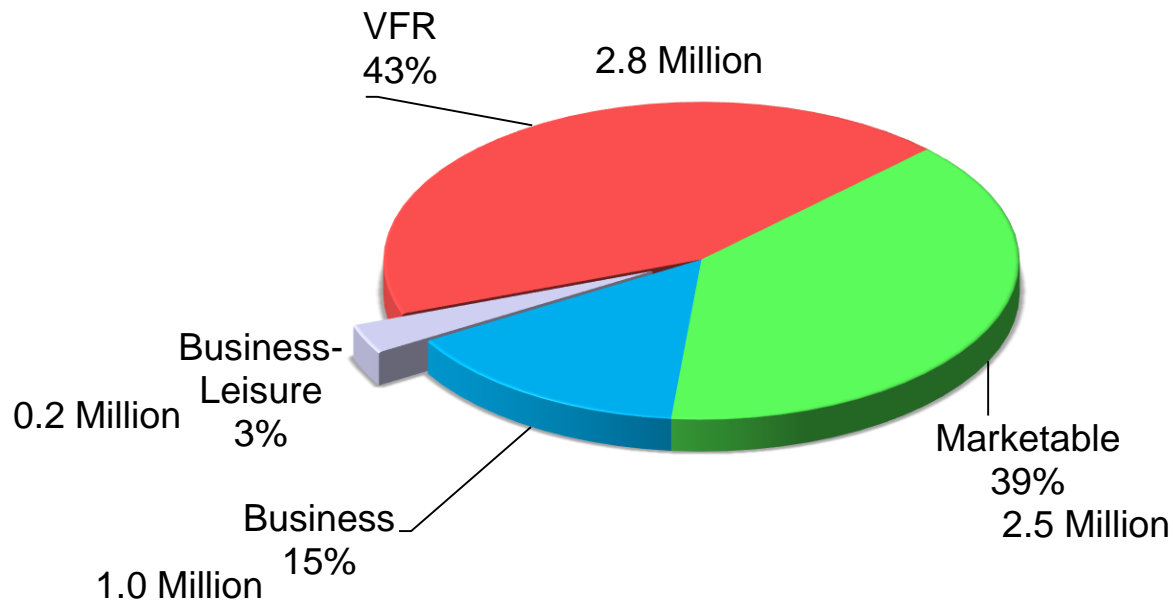


Louisville Overnight Travel Market — by Main Trip Purpose

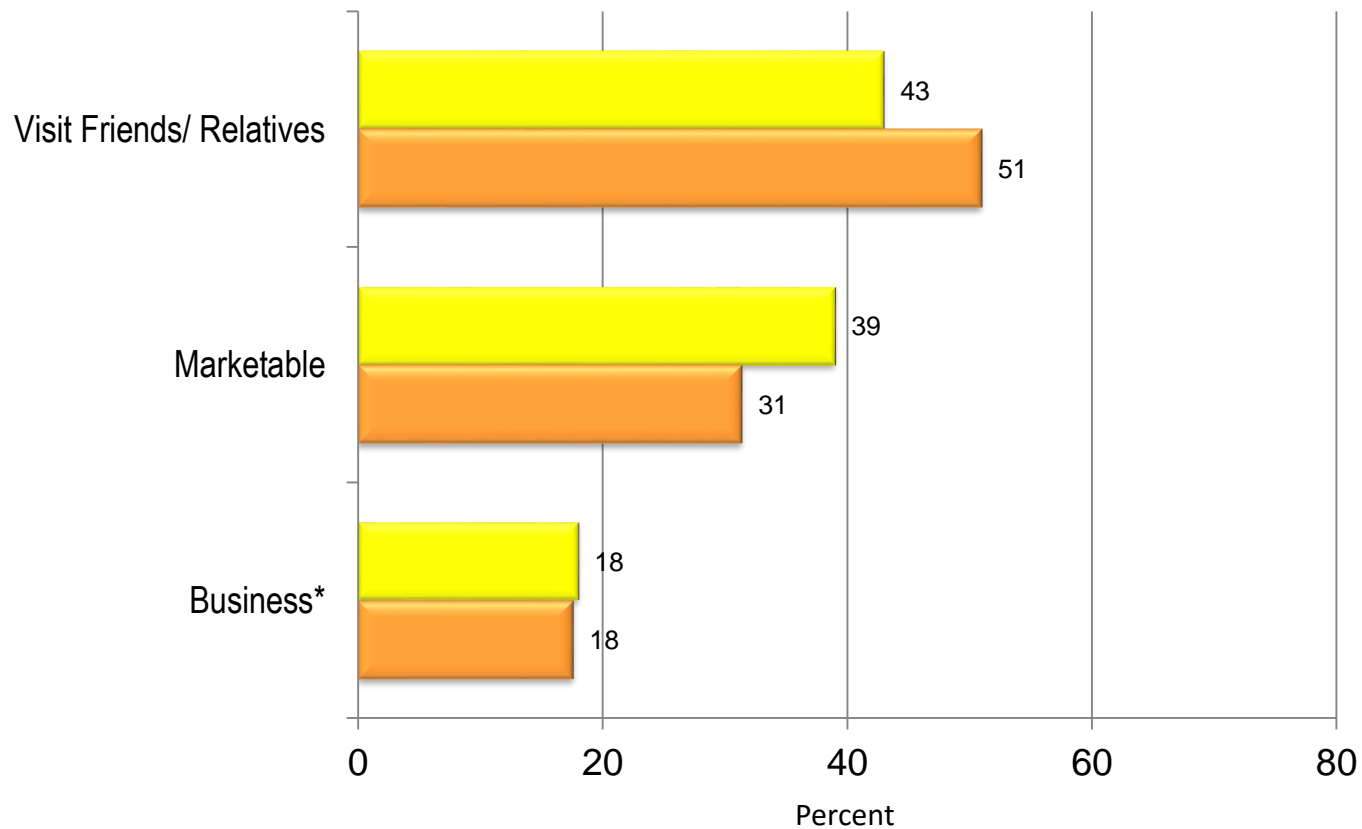


Adult Overnight Person-Trips = 6.5 Million

+4% vs. 2014



Overnight Trips to Louisville — 2015 vs. 2014



* Includes business-leisure

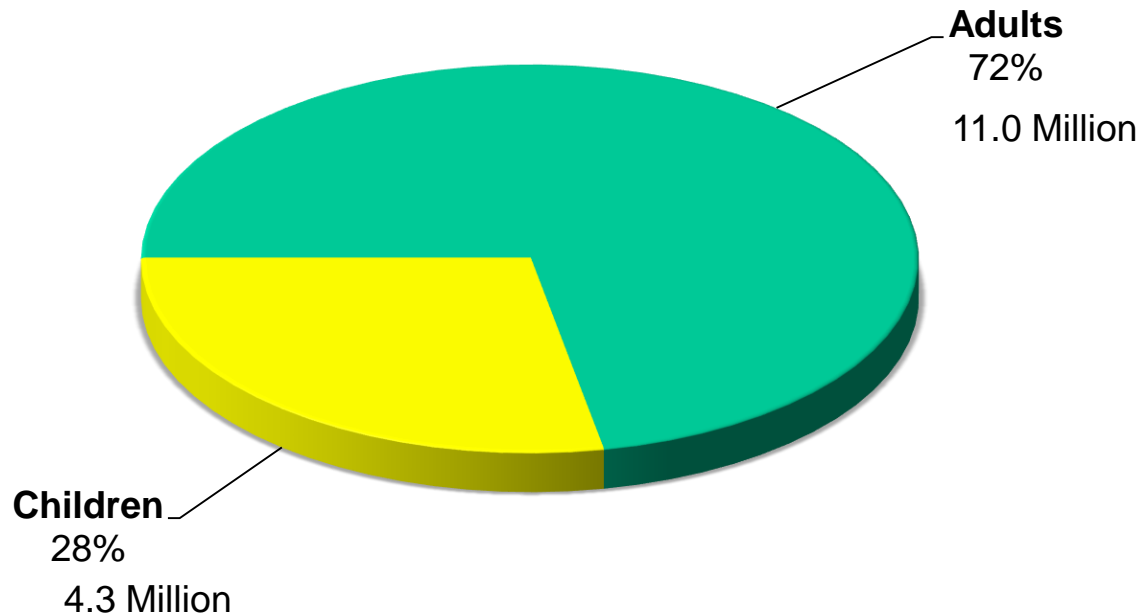
■ 2015 ■ 2014

Size of Louisville Day Travel Market — Adults vs. Children



Total Day Person-Trips = 15.3 Million

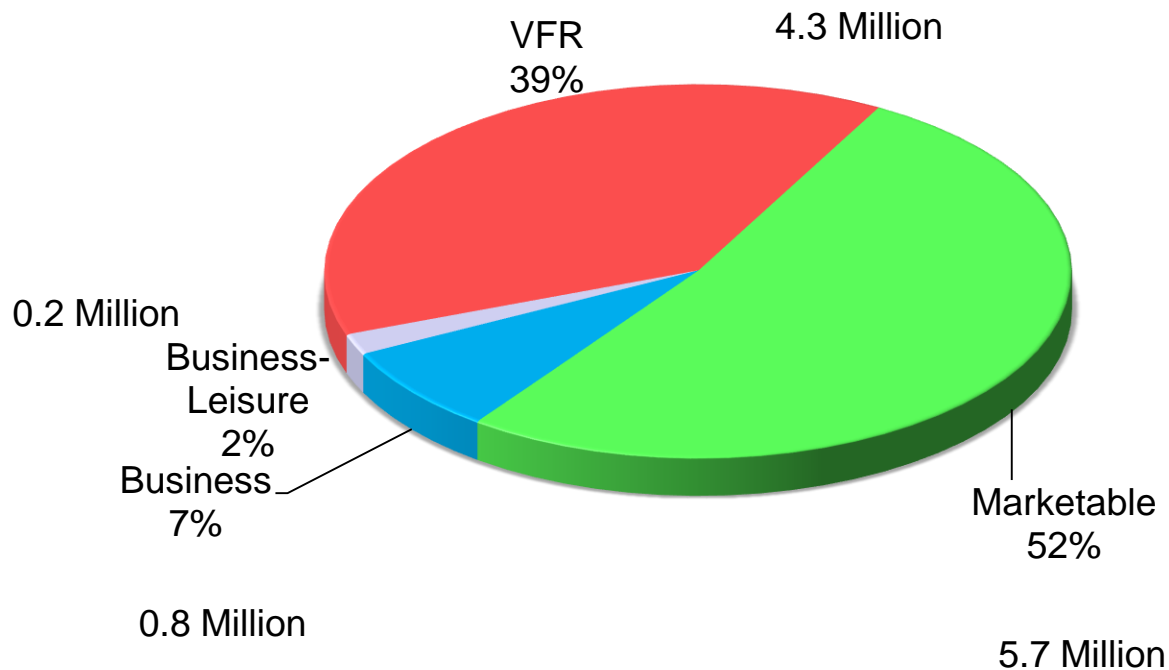
+6% vs. 2014



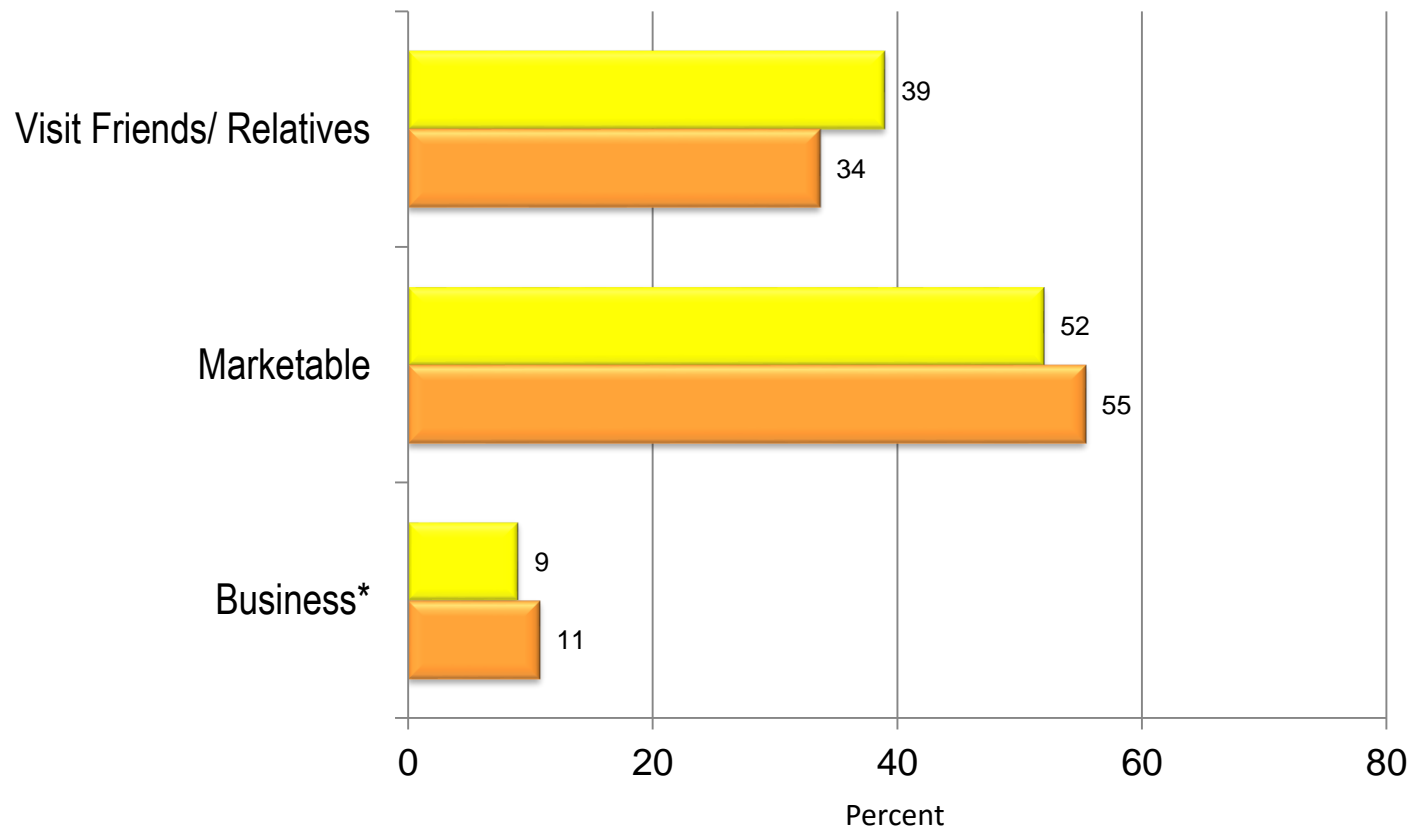
Louisville Day Travel Market – by Trip Purpose



Adult Day Person-Trips = 11.0 Million



Day Trips to Louisville — 2015 vs. 2014



* Includes business-leisure

■ 2015 ■ 2014



Overnight Trip Detail



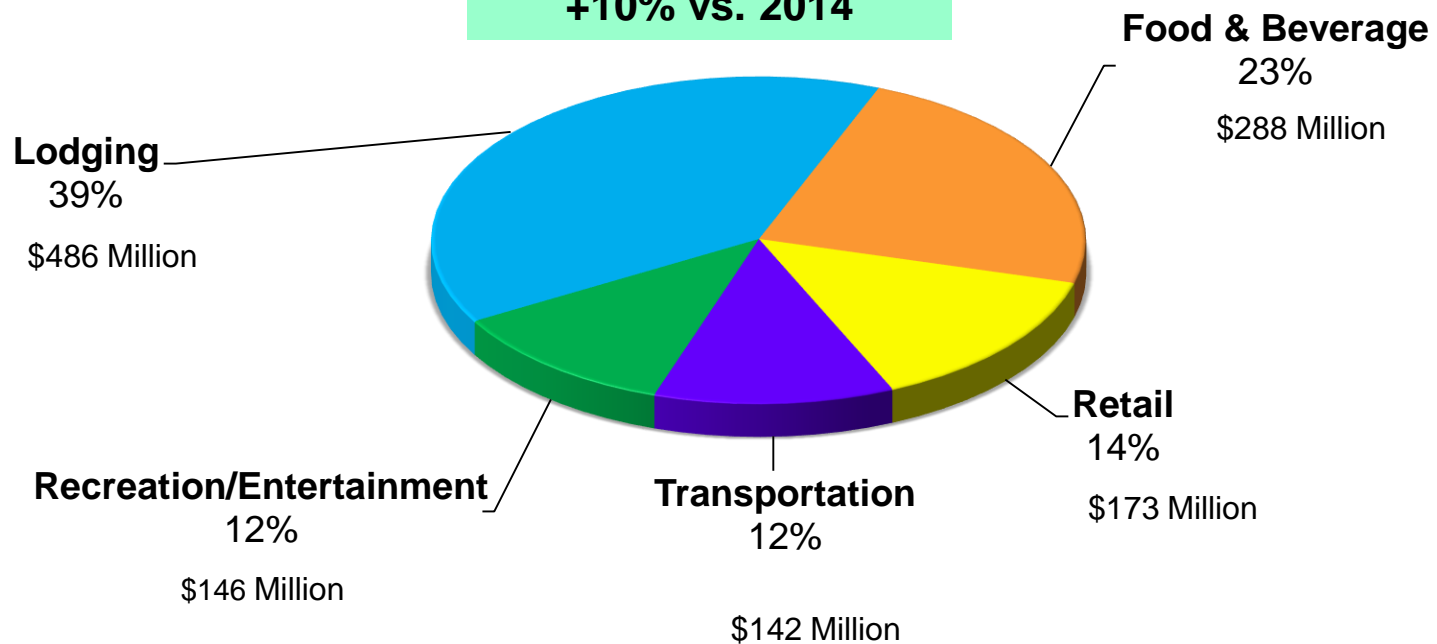
Overnight Trip Expenditures

Total Domestic Louisville Overnight Spending – by Sector



Total Spending = \$1.235 Billion

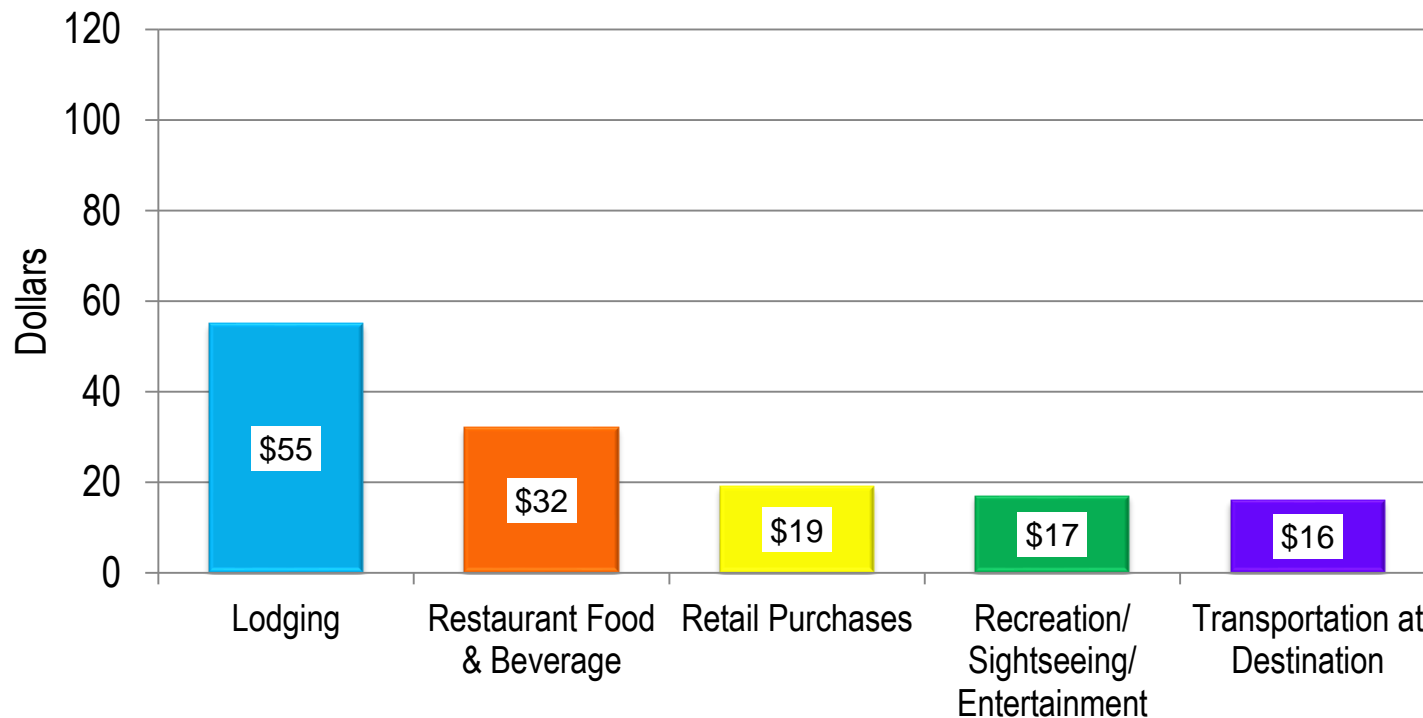
+10% vs. 2014



Average Per Person Expenditures on Domestic Overnight Trips – By Sector



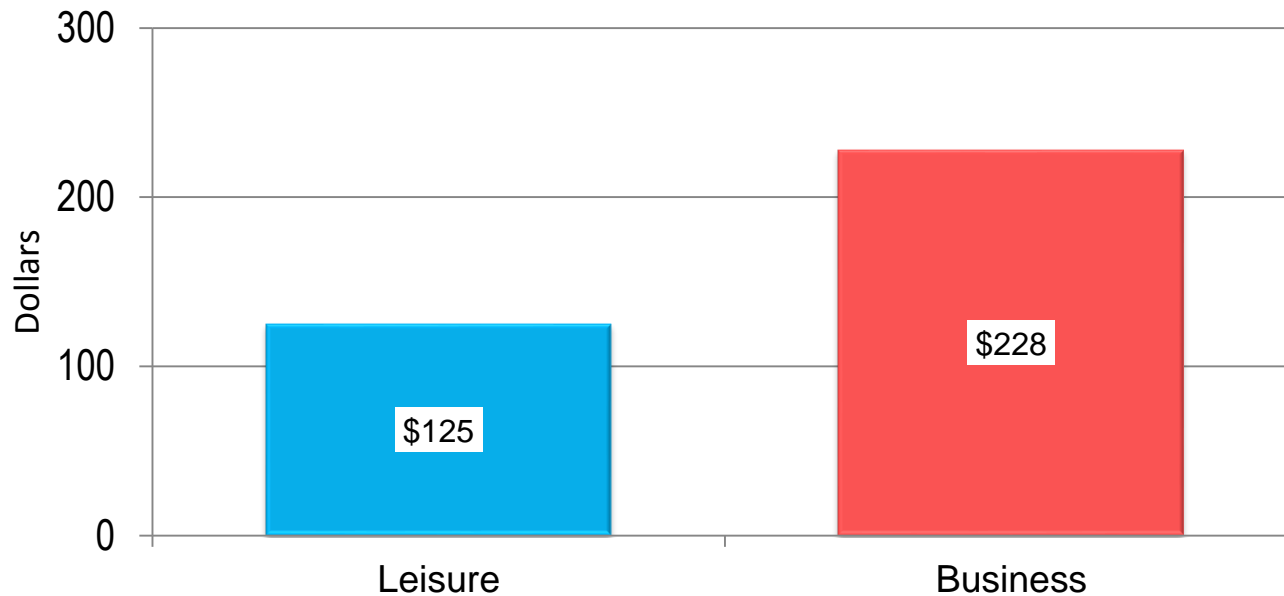
Base: Total Overnight Person-Trips to Louisville



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



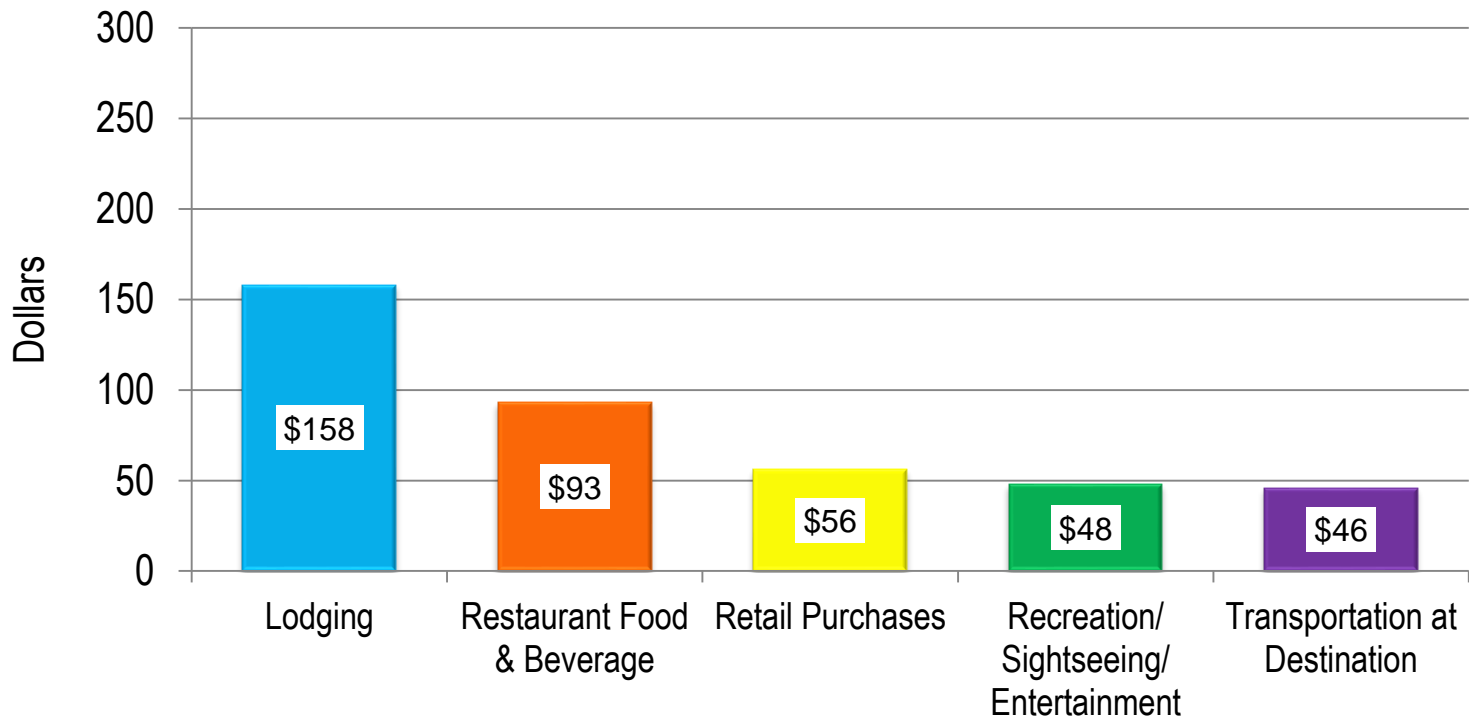
Base: Total Overnight Person-Trips to Louisville



Average Per Party Expenditures on Domestic Overnight Trips – By Sector



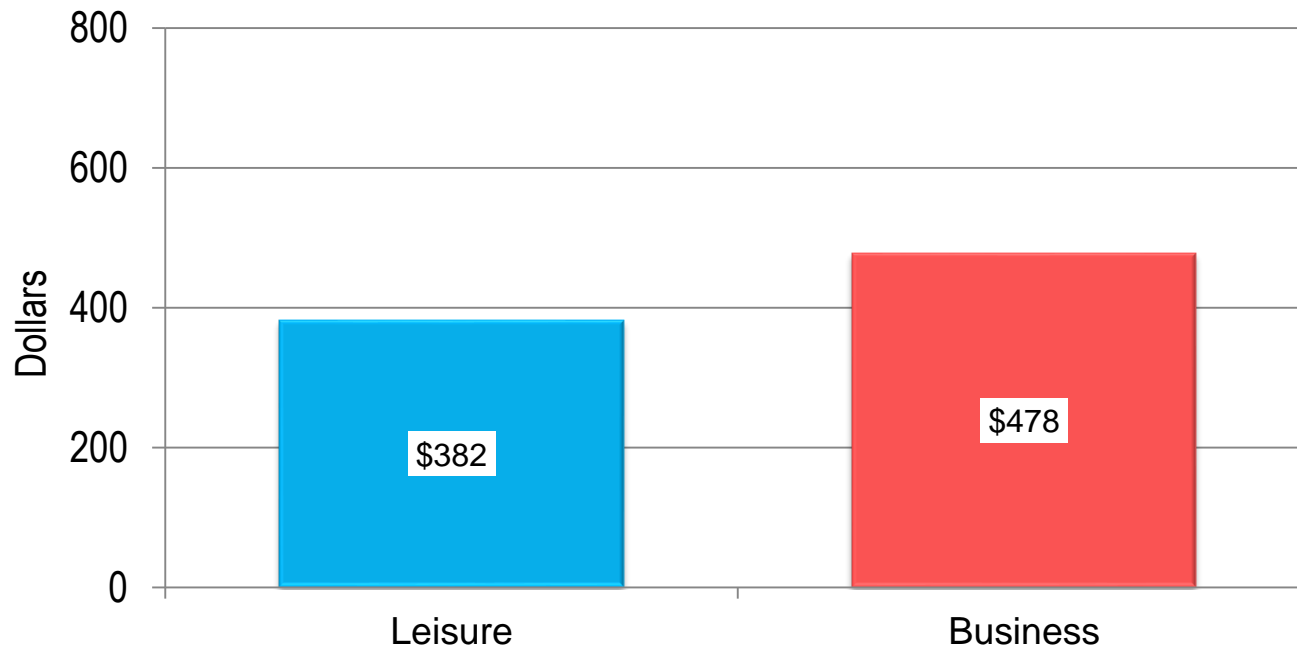
Base: Total Overnight Person-Trips to Louisville



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



Base: Total Overnight Person-Trips to Louisville



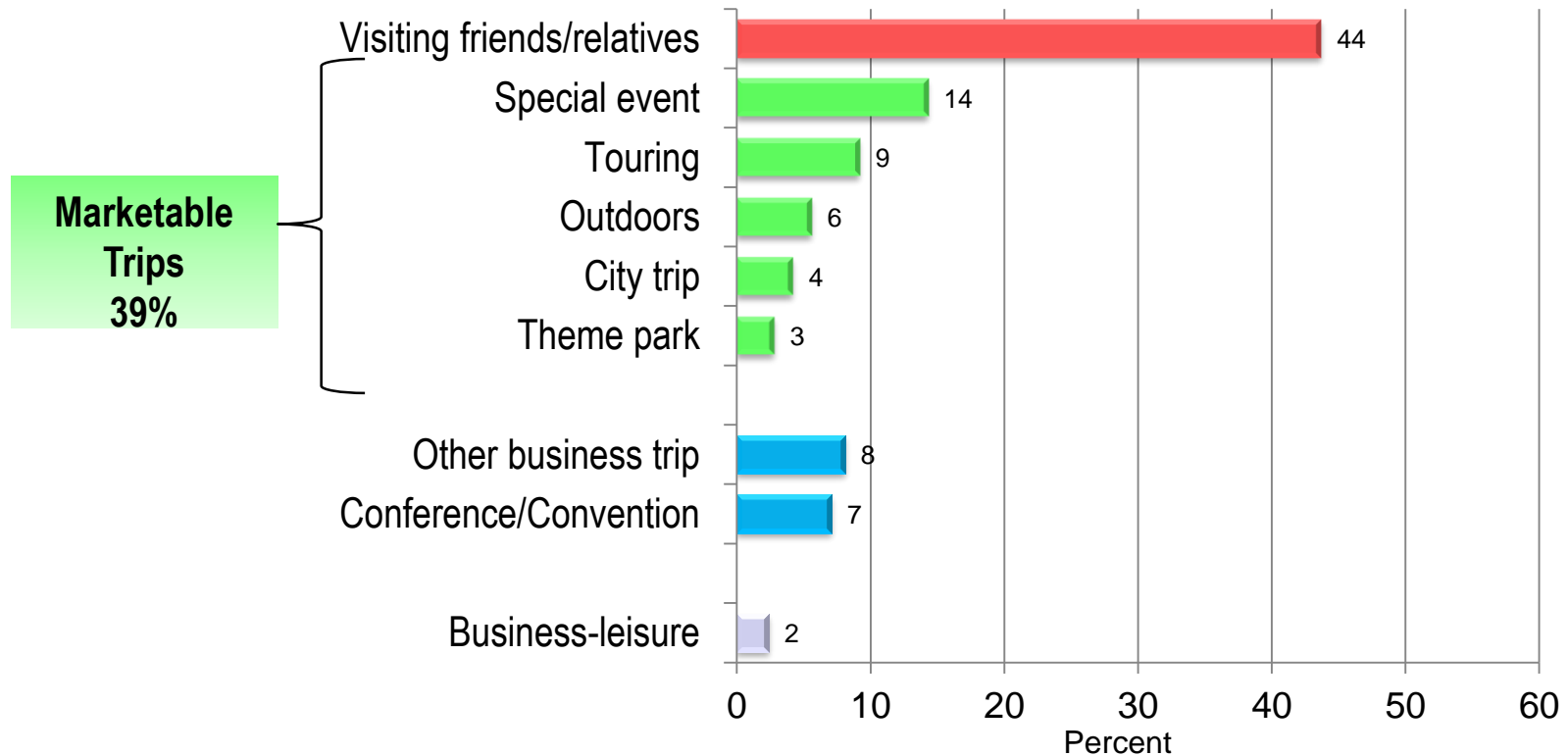


Overnight Trip Characteristics

Main Purpose of Trip



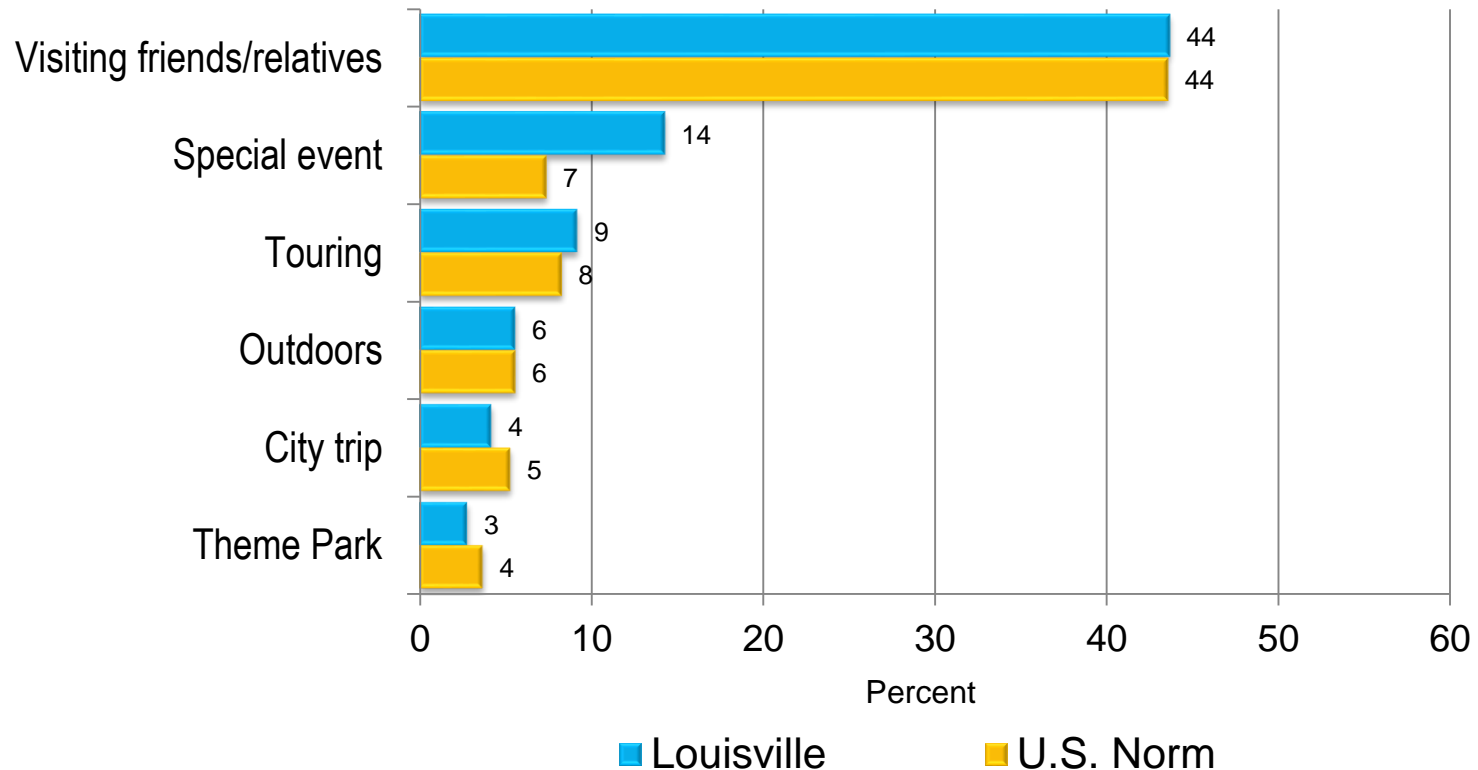
Base: Total Overnight Person-Trips to Louisville



Main Purpose of Leisure Trip – Louisville vs. National Norm



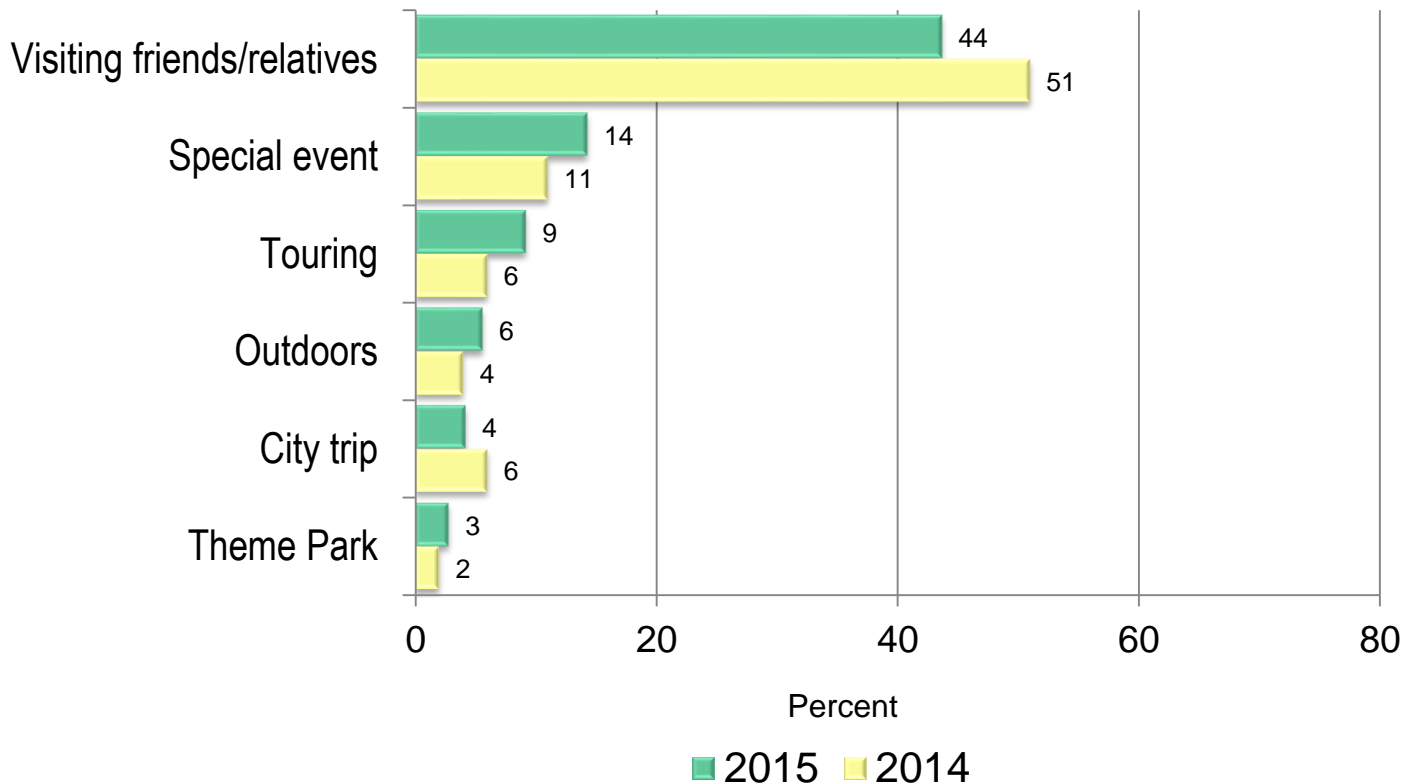
Base: Total Overnight Person-Trips



Main Purpose of Overnight Leisure Trip to Louisville – 2015 vs. 2014



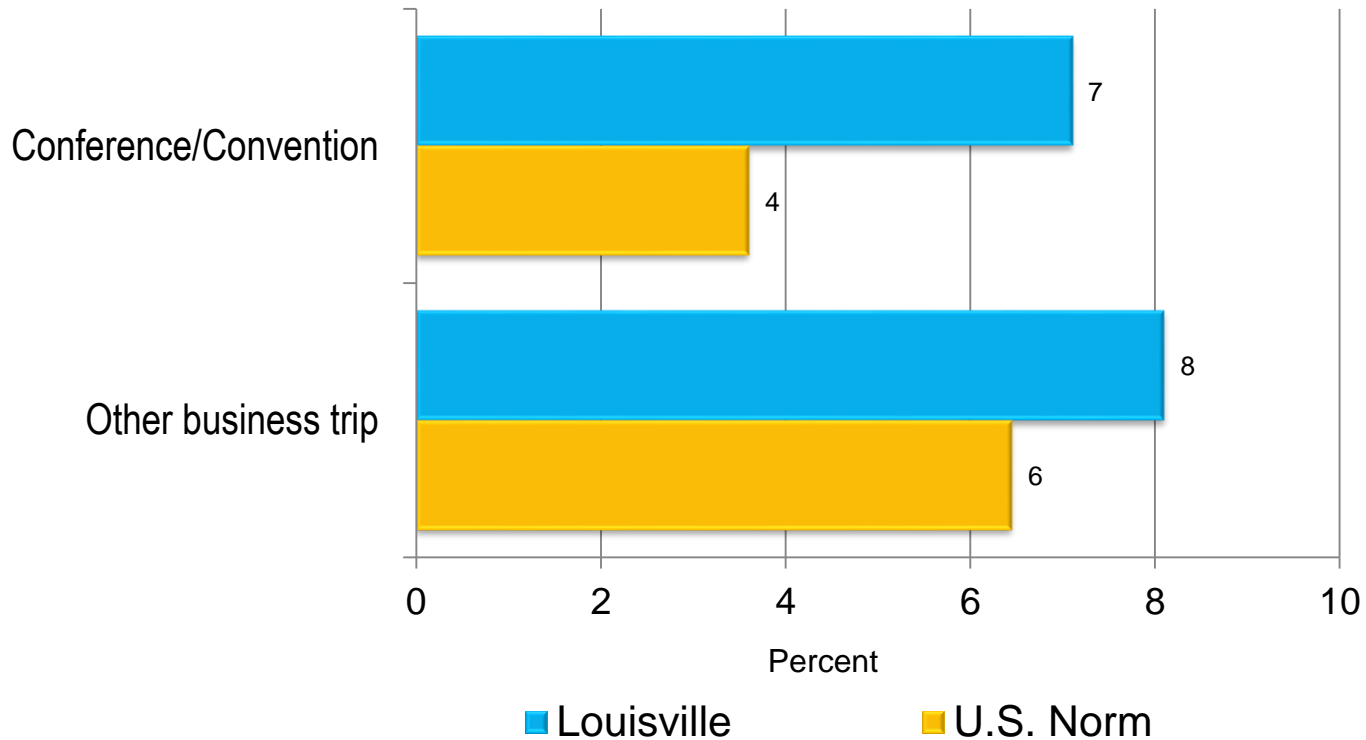
Base: Total Overnight Person-Trips to Louisville



Main Purpose of Business Trip — Louisville vs. National Norm



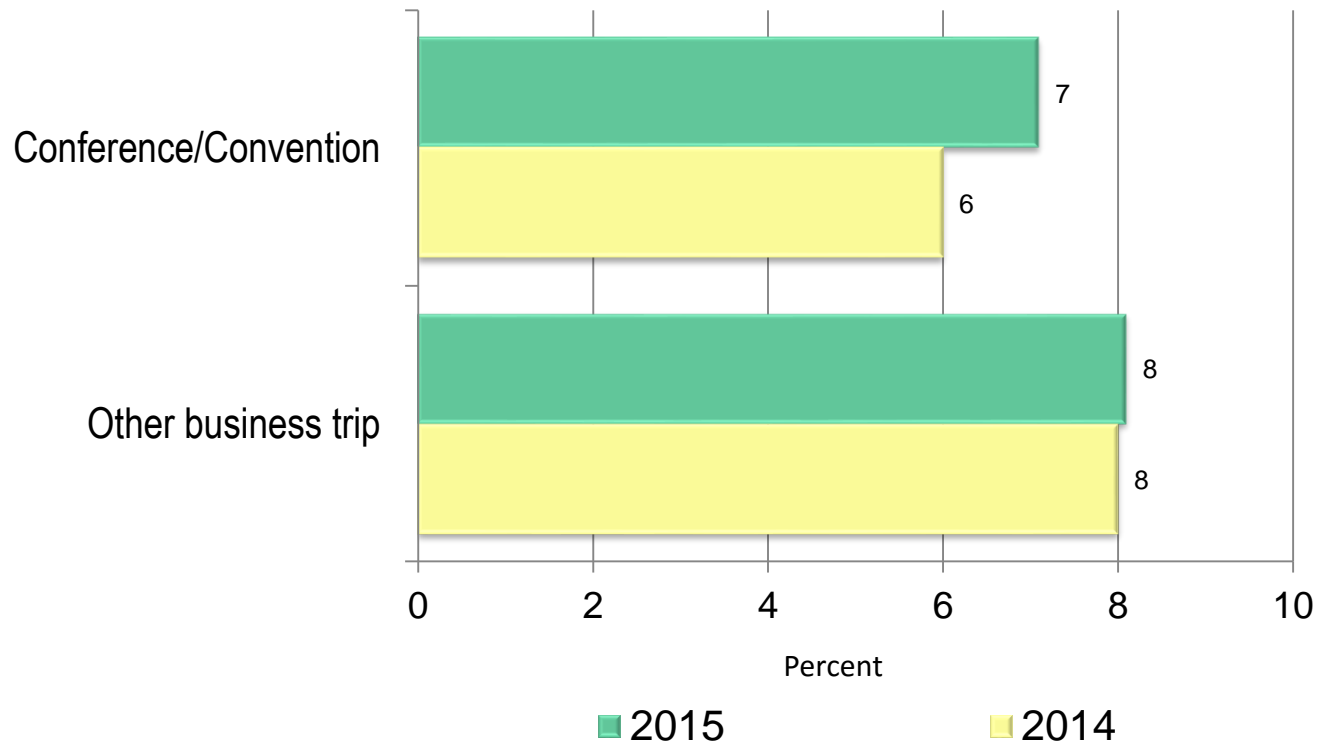
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Main Purpose of Overnight Business Trip to Louisville – 2015 vs. 2014



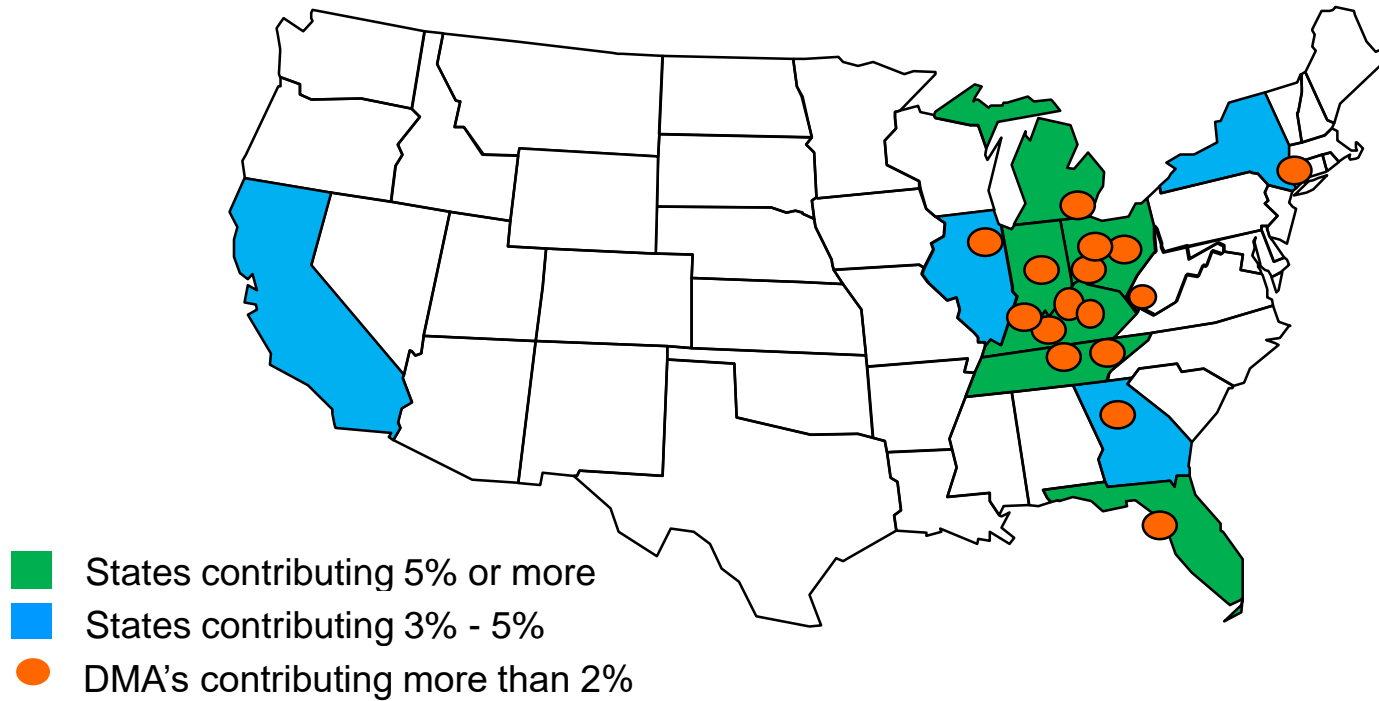
Base: Total Overnight Person-Trips to Louisville



Sources of Business



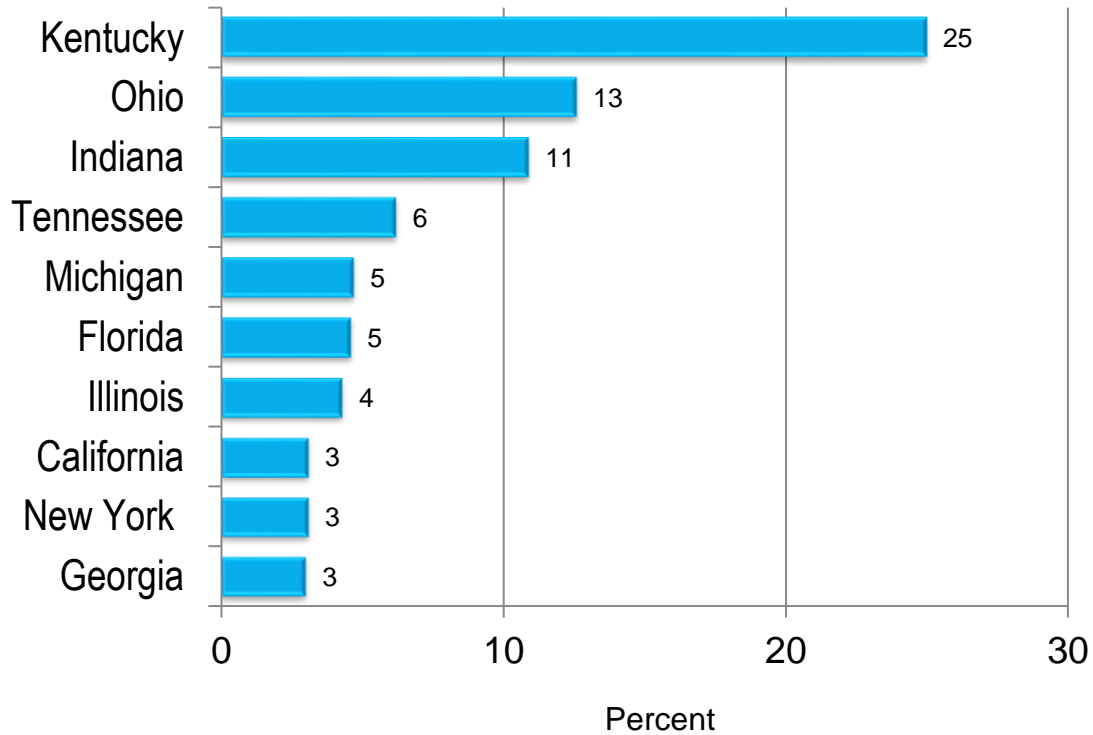
Base: Overnight Person-Trips to Louisville



State Origin Of Trip



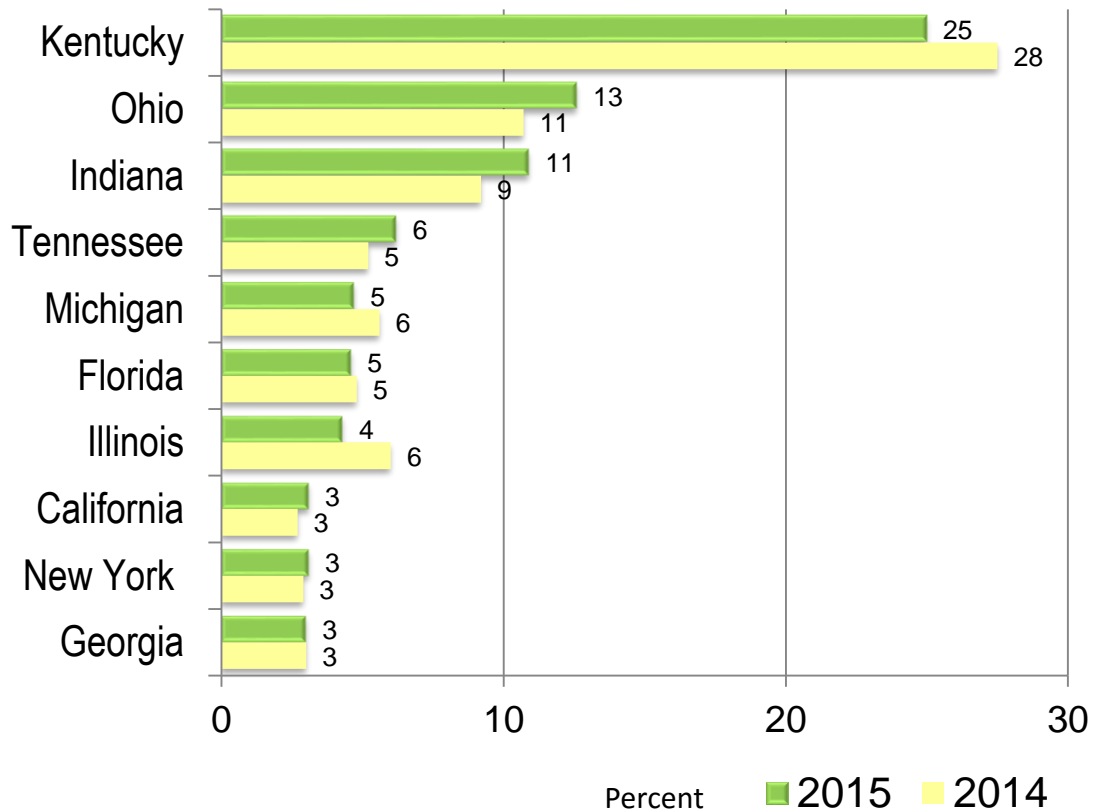
Base: Total Overnight Person-Trips to Louisville



State Origin Of Trip



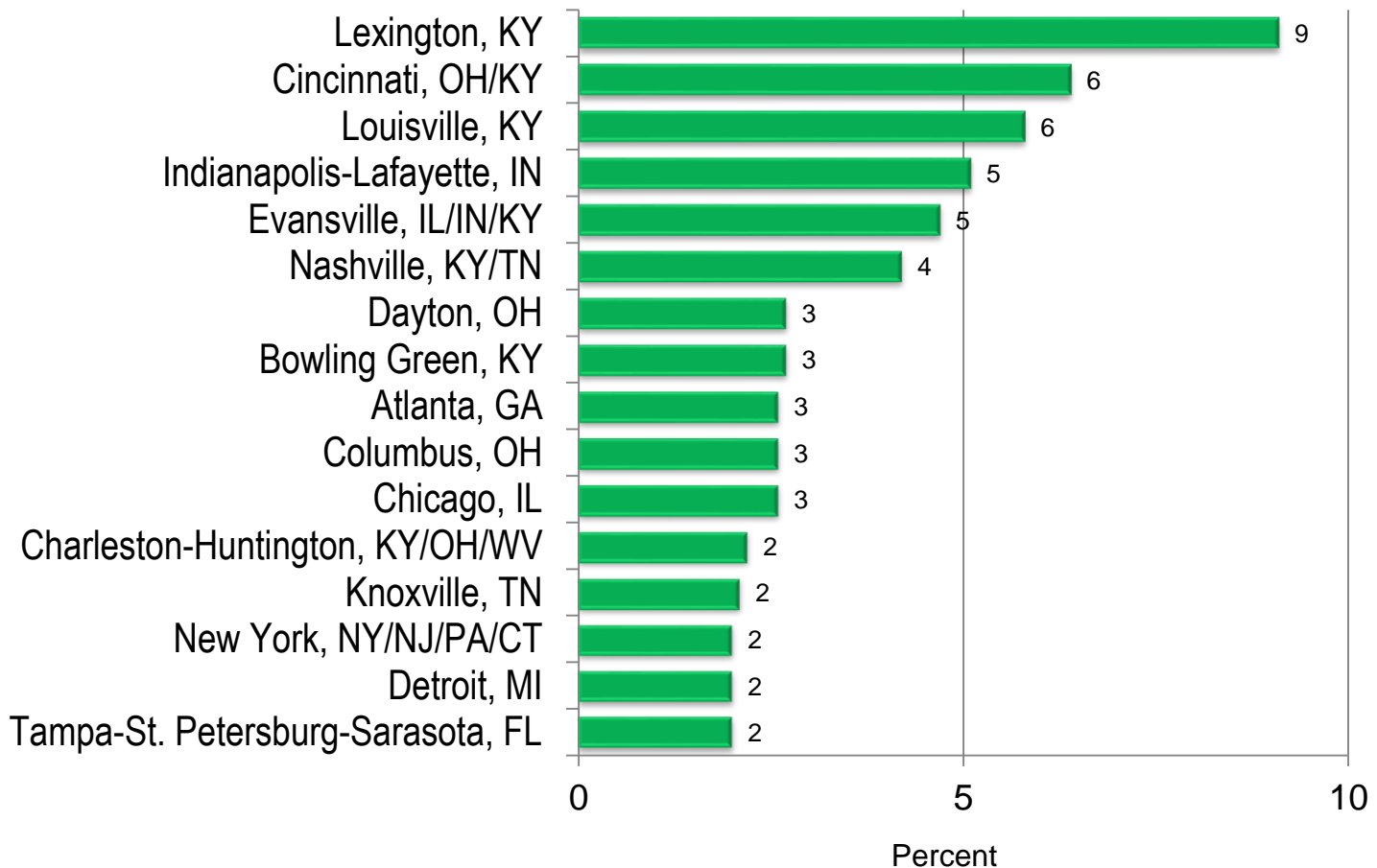
Base: Total Overnight Person-Trips to Louisville



DMA Origin Of Trip



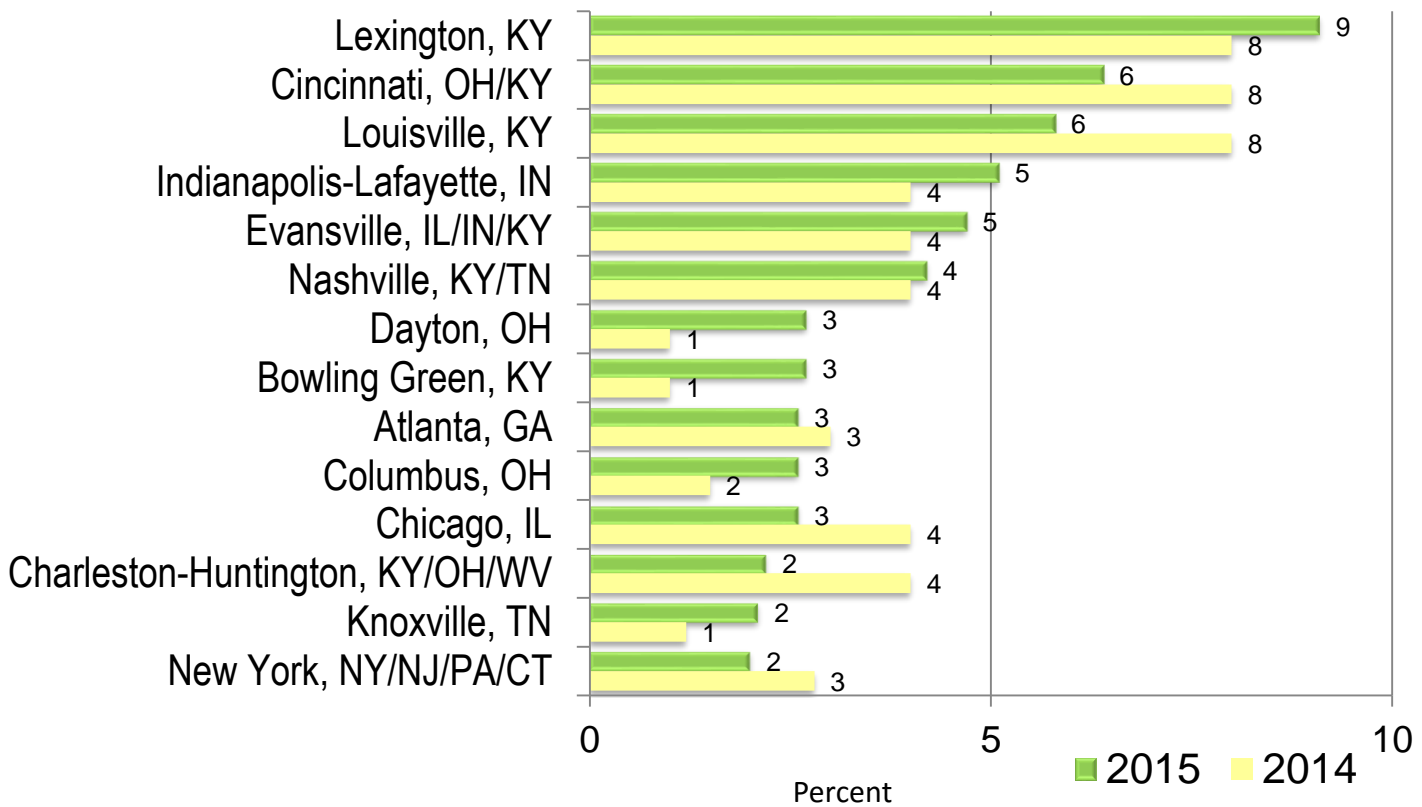
Base: Total Overnight Person-Trips to Louisville



DMA Origin Of Trip



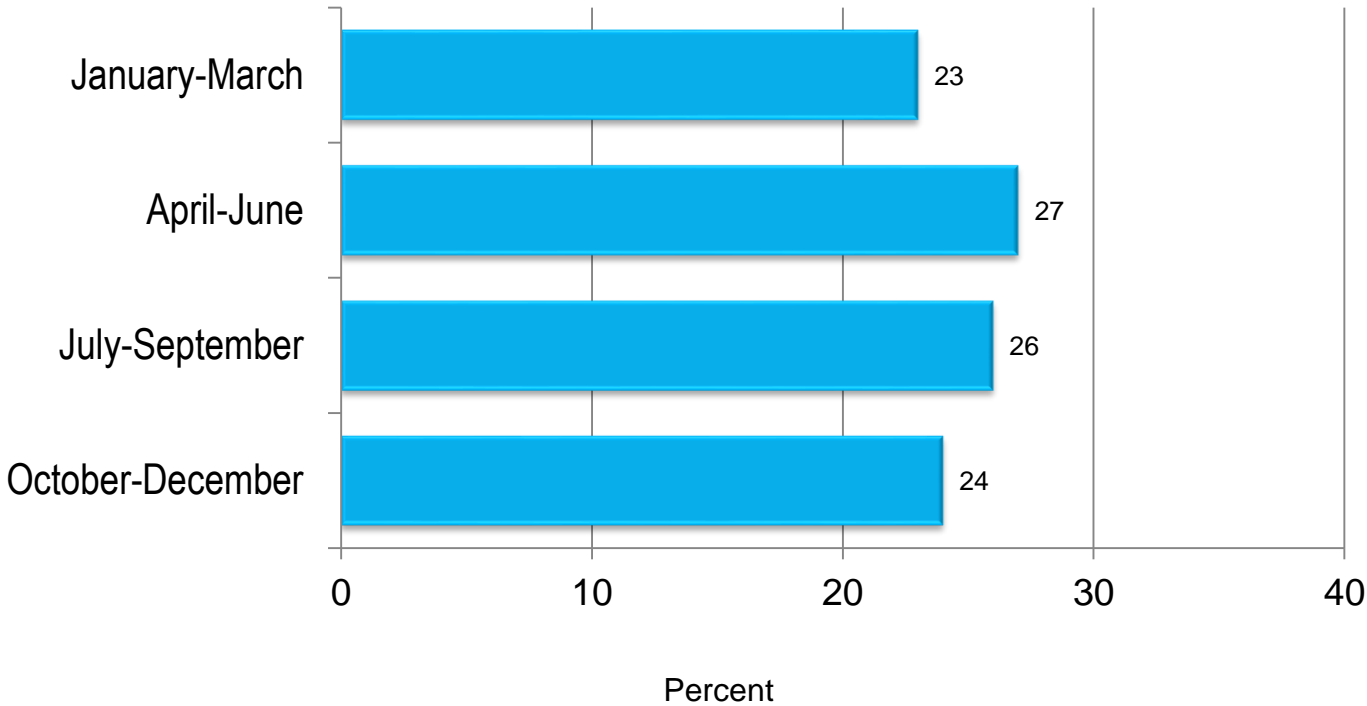
Base: Total Overnight Person-Trips to Louisville



Season of Trip



Base: Total Overnight Person-Trips to Louisville

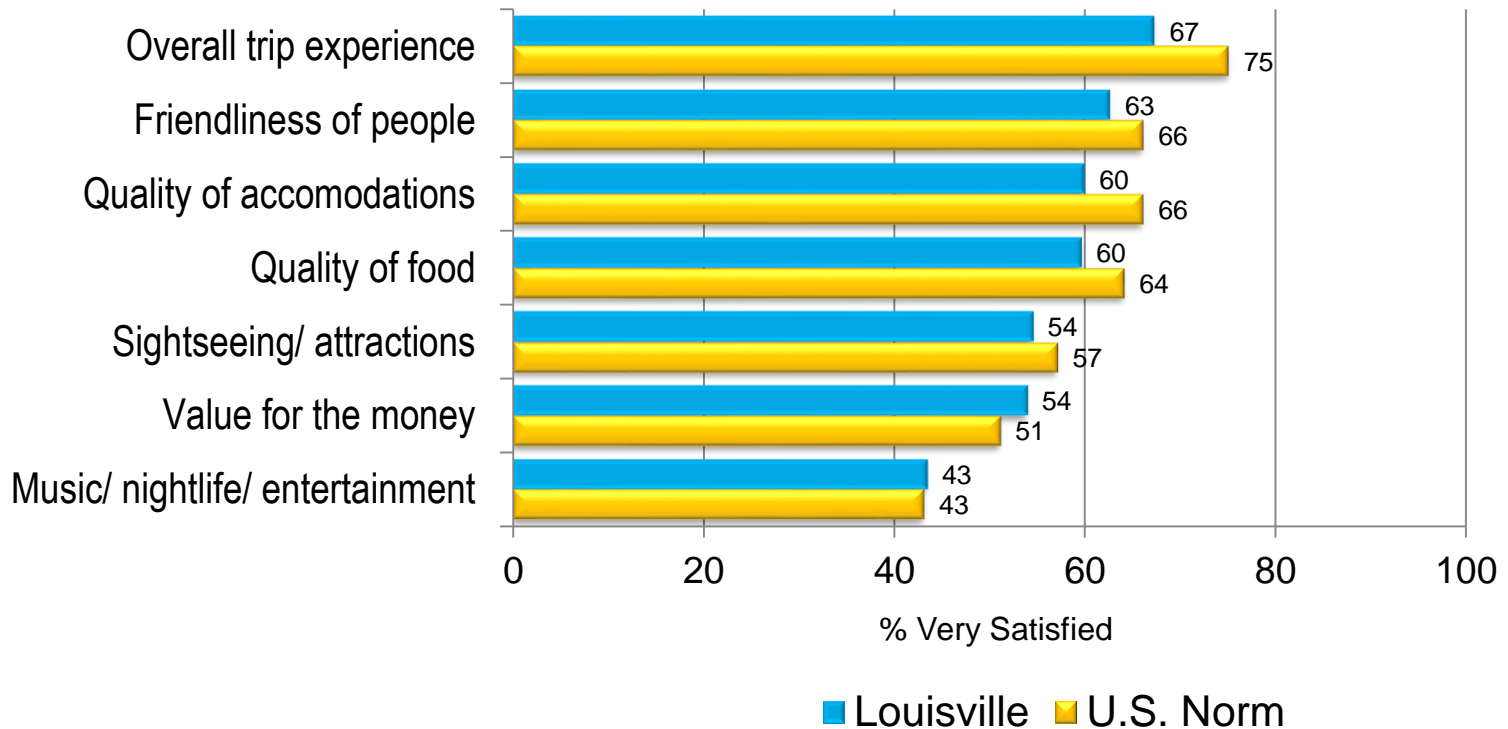


Satisfaction with Louisville Trip

% Very Satisfied



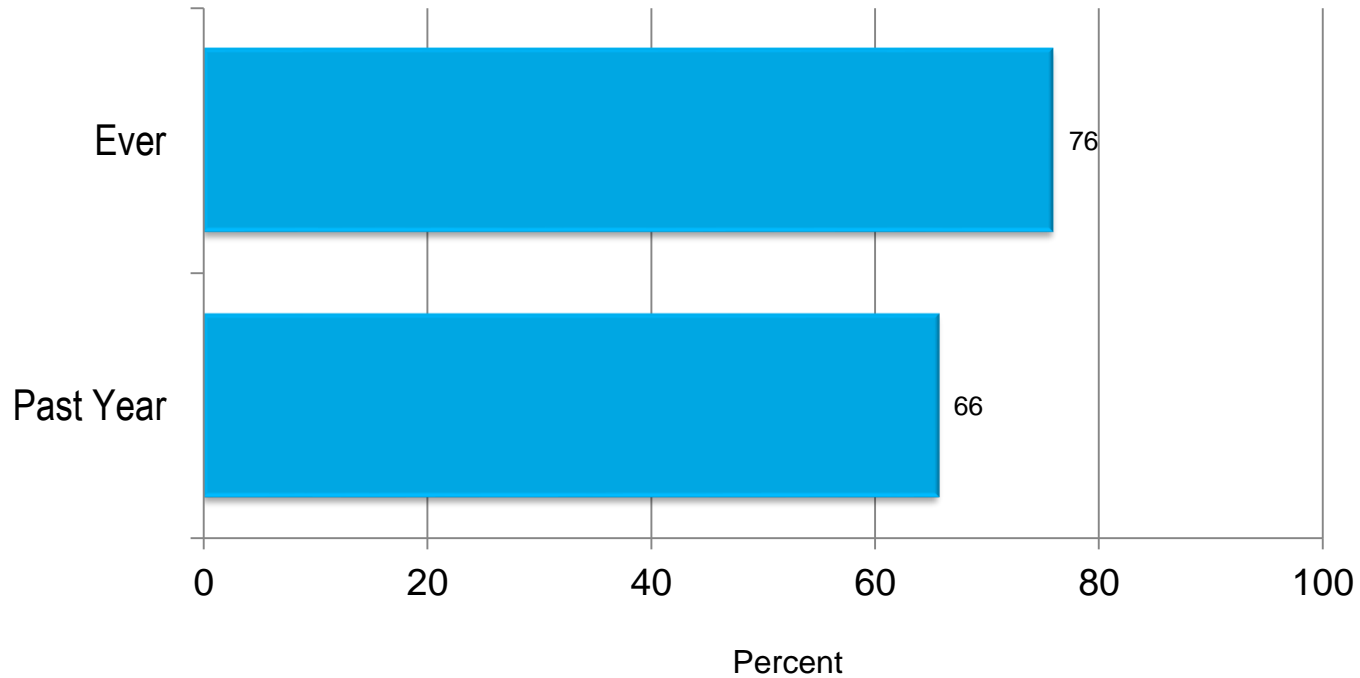
Base: Total Overnight Person-Trips to Louisville



Past Visitation to Louisville



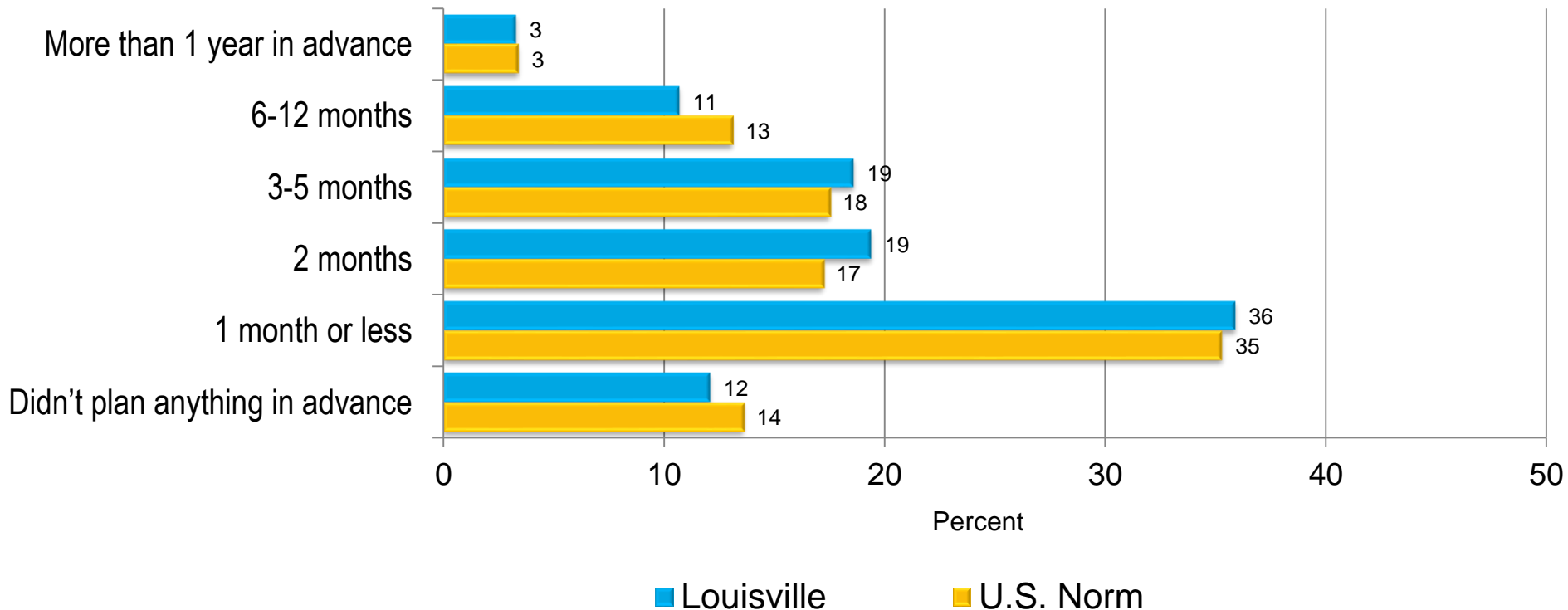
Base: Total Overnight Person-Trips to Louisville



Length of Trip Planning



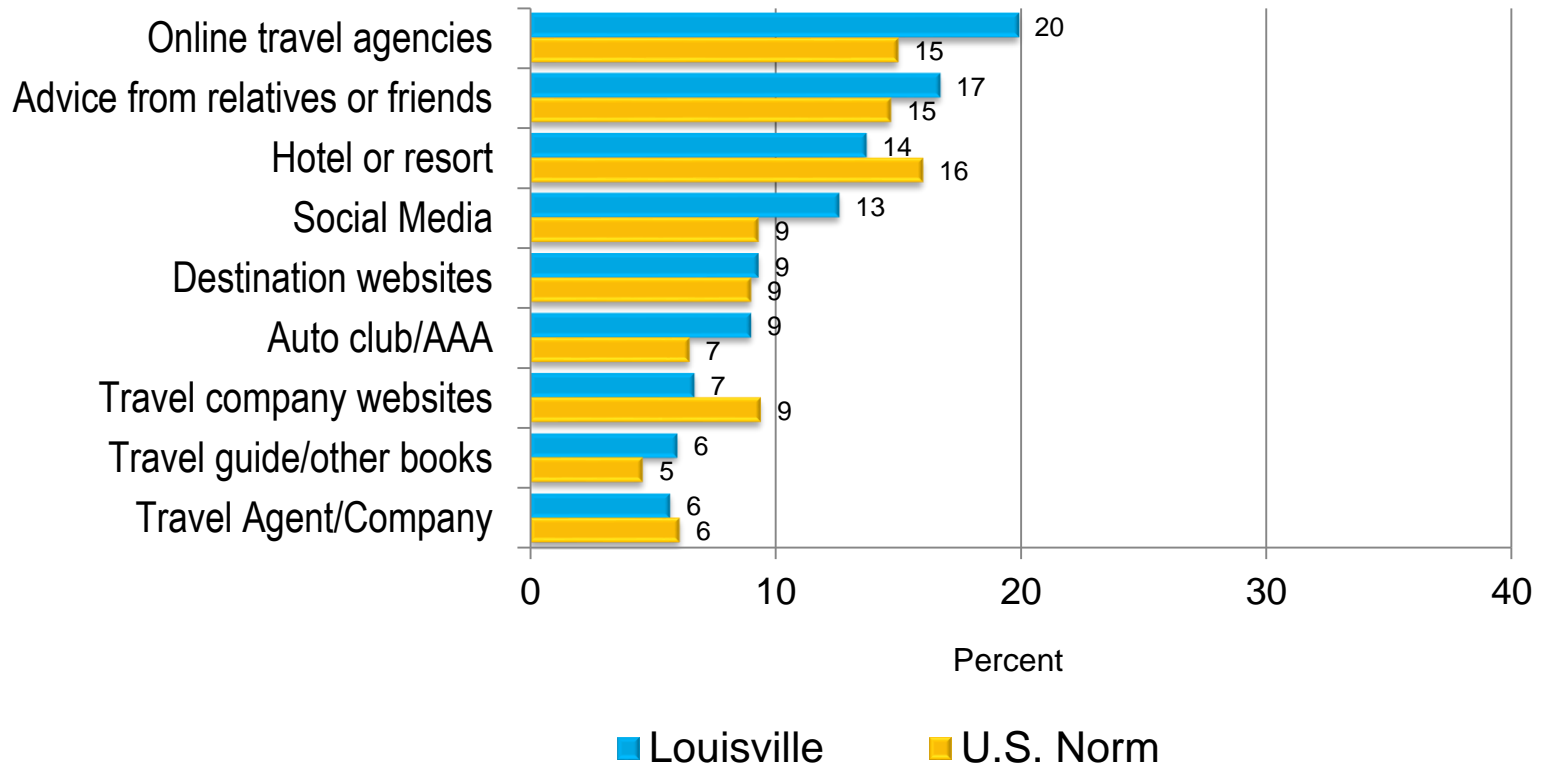
Base: Total Overnight Person-Trips



Trip Planning Information Sources



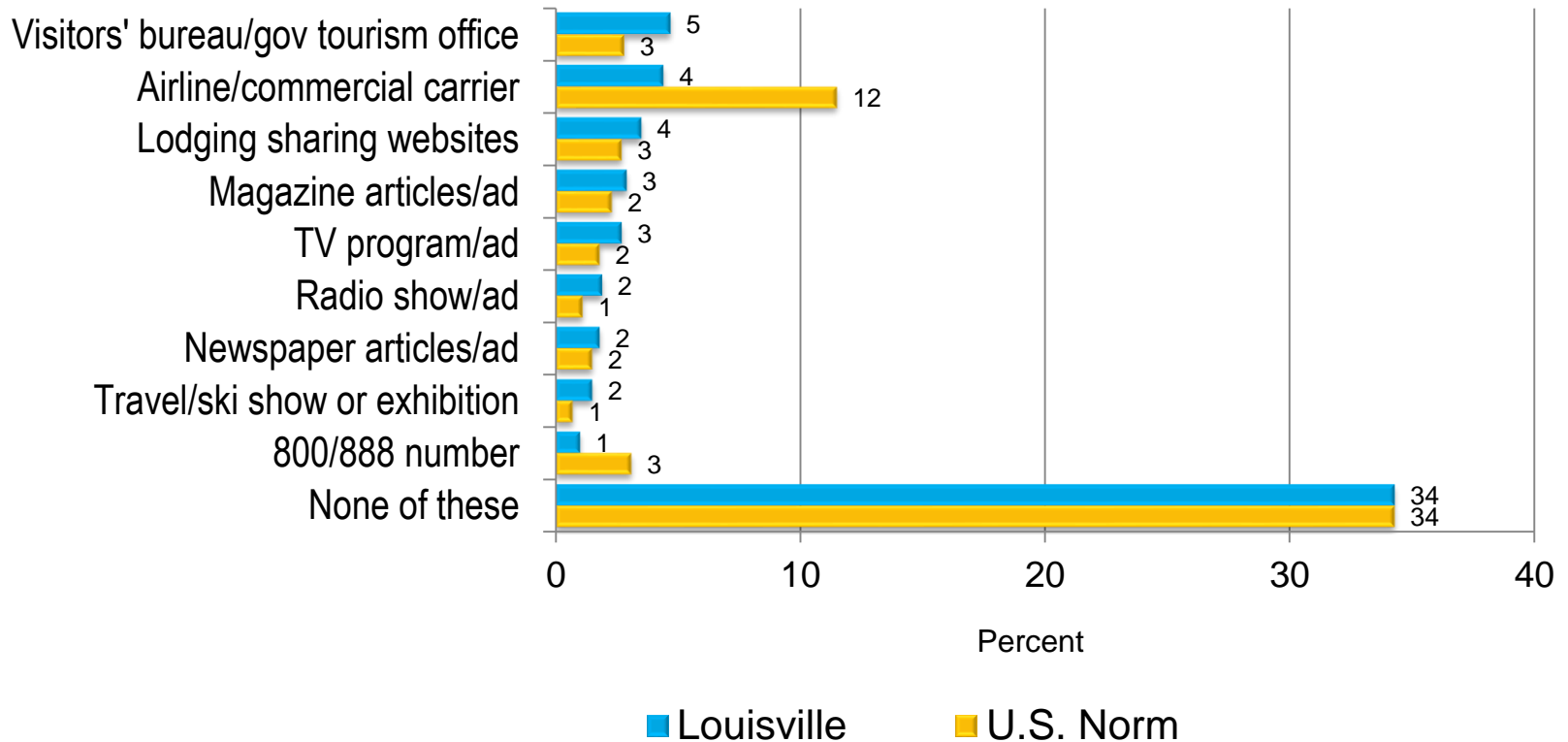
Base: Total Overnight Person-Trips



Trip Planning Information Sources – (Cont'd)



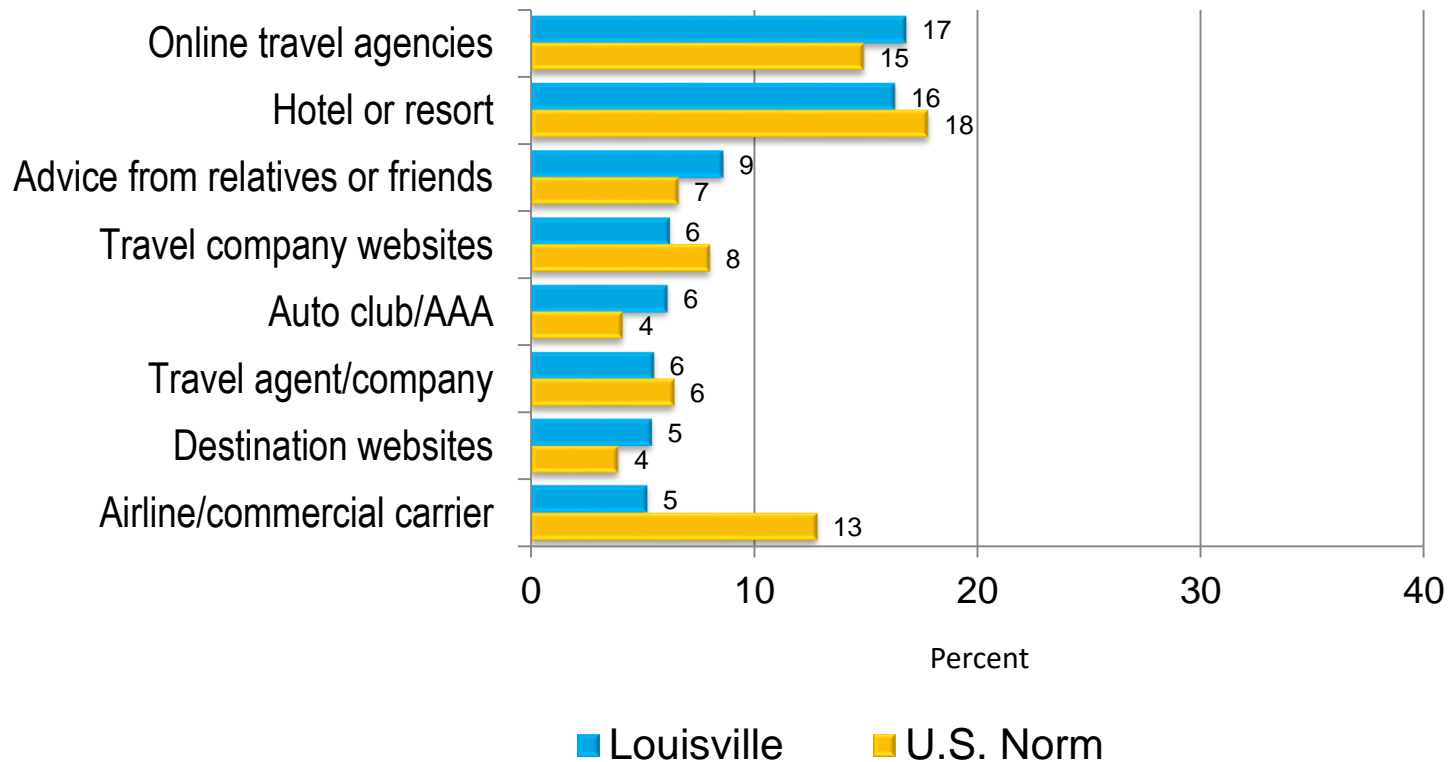
Base: Total Overnight Person-Trips



Method of Booking



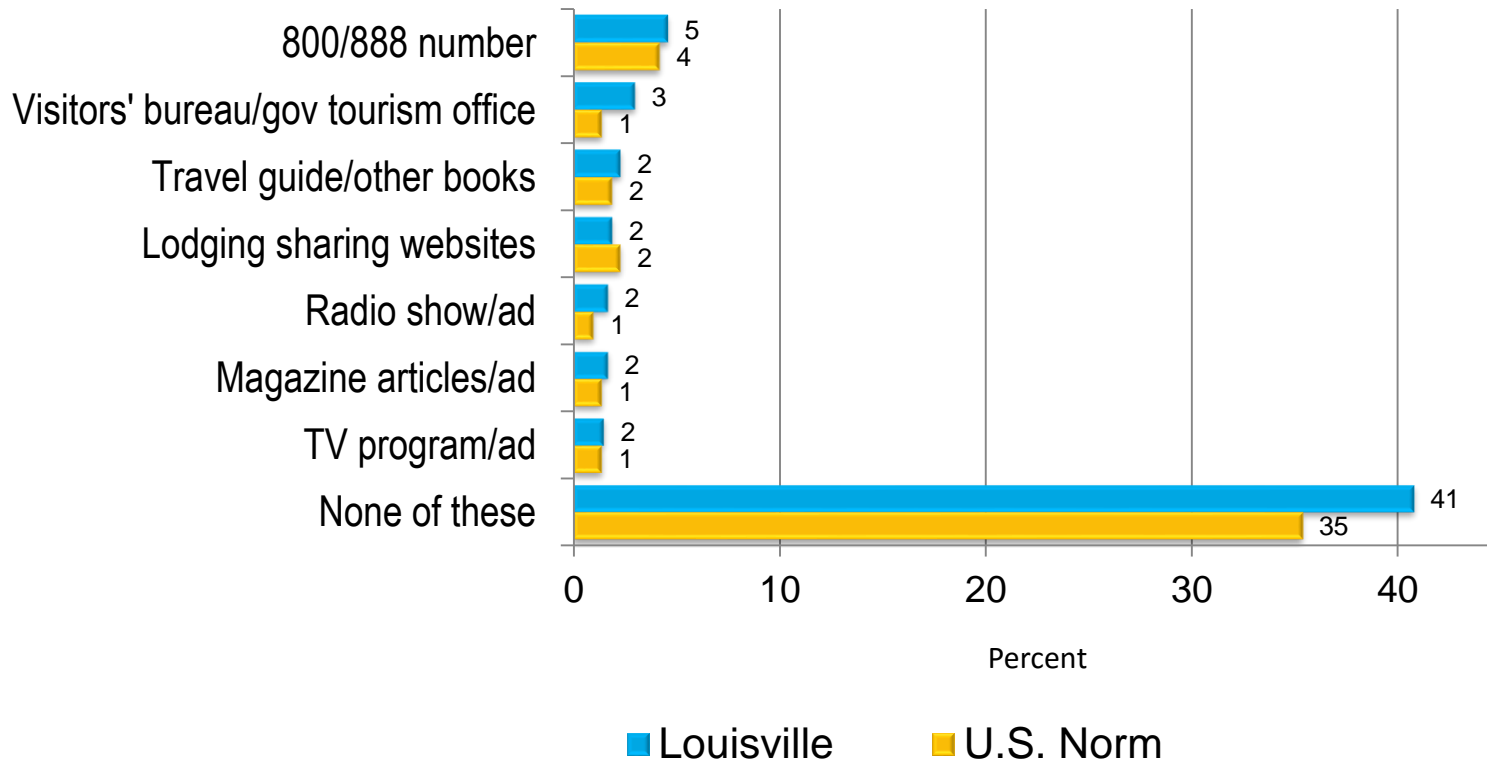
Base: Total Overnight Person-Trips



Method of Booking



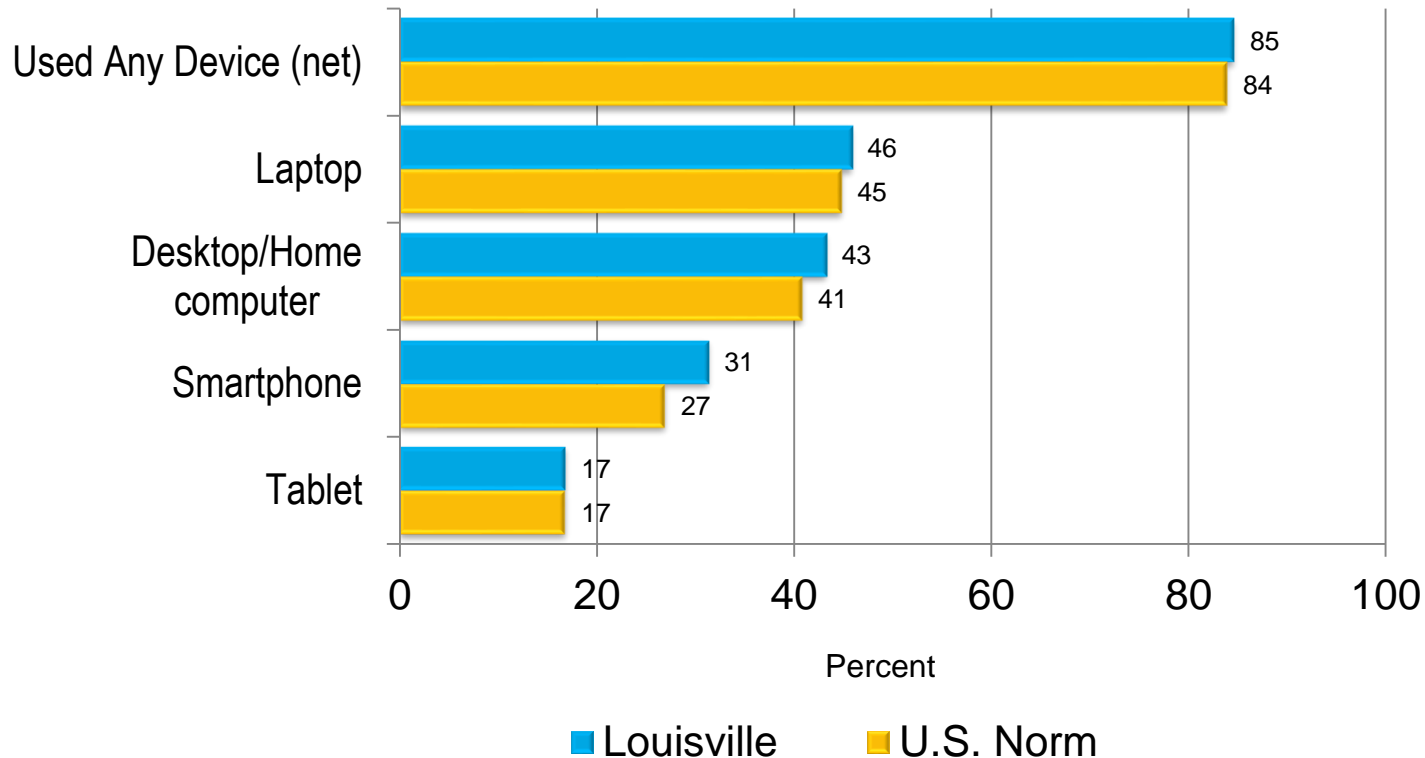
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



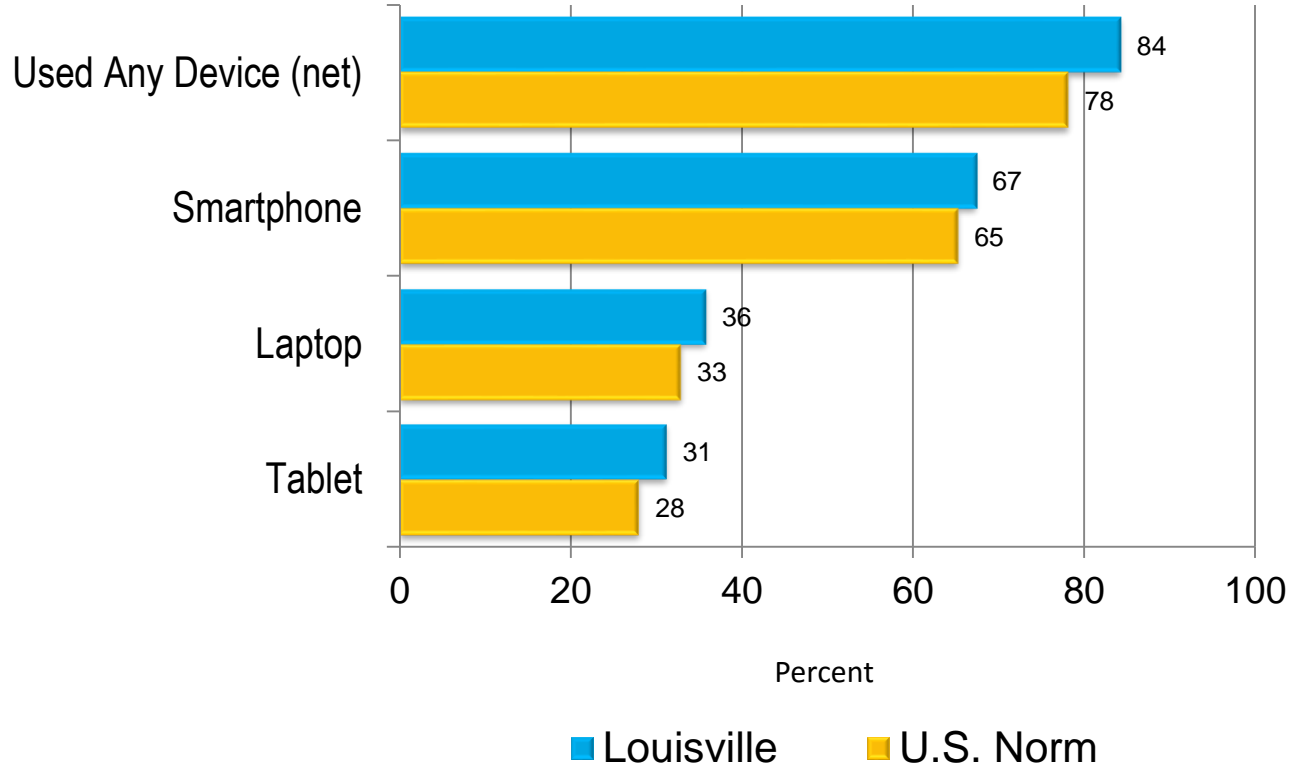
Base: Total Overnight Person-Trips



Devices Used During Trip



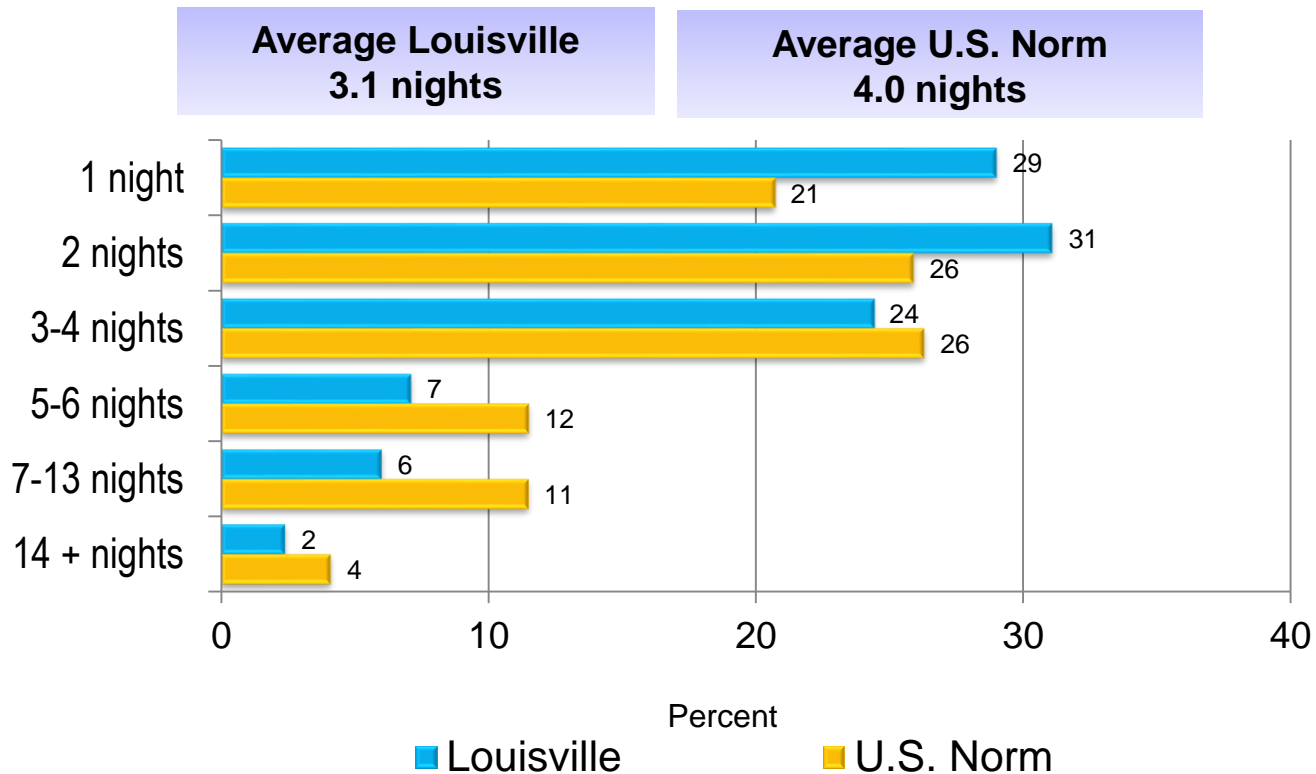
Base: Total Overnight Person-Trips



Total Nights Away on Trip



Base: Total Overnight Person-Trips

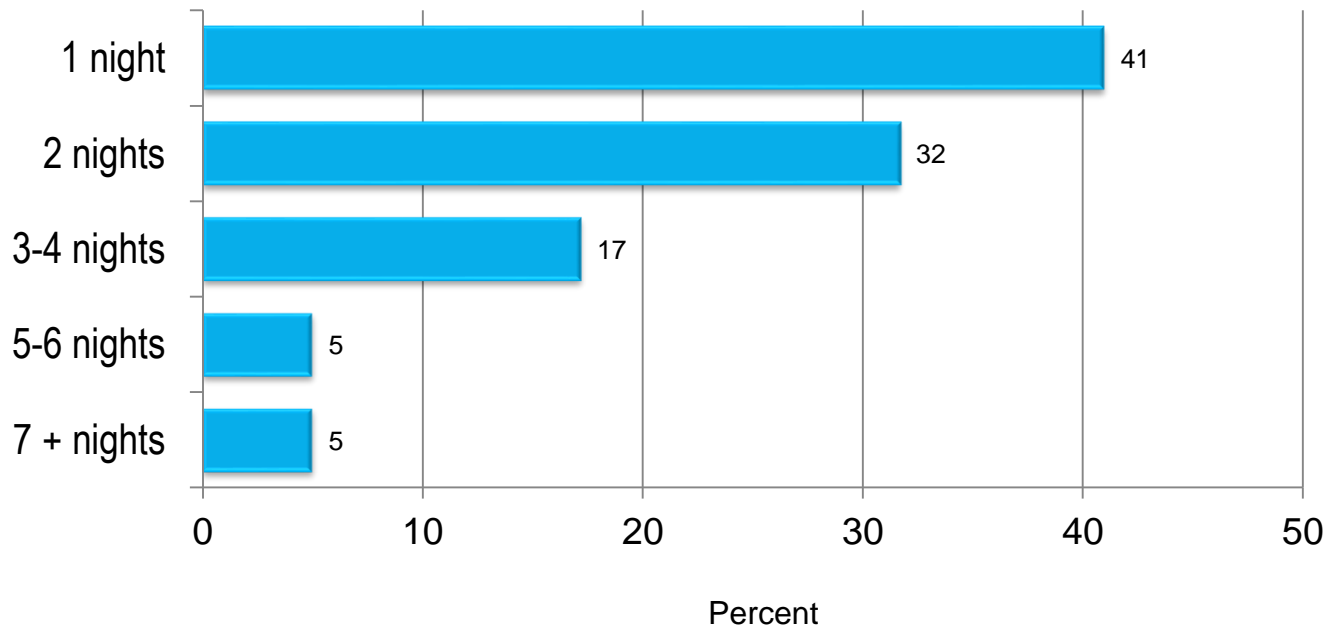


Number of Nights Spent in Louisville



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

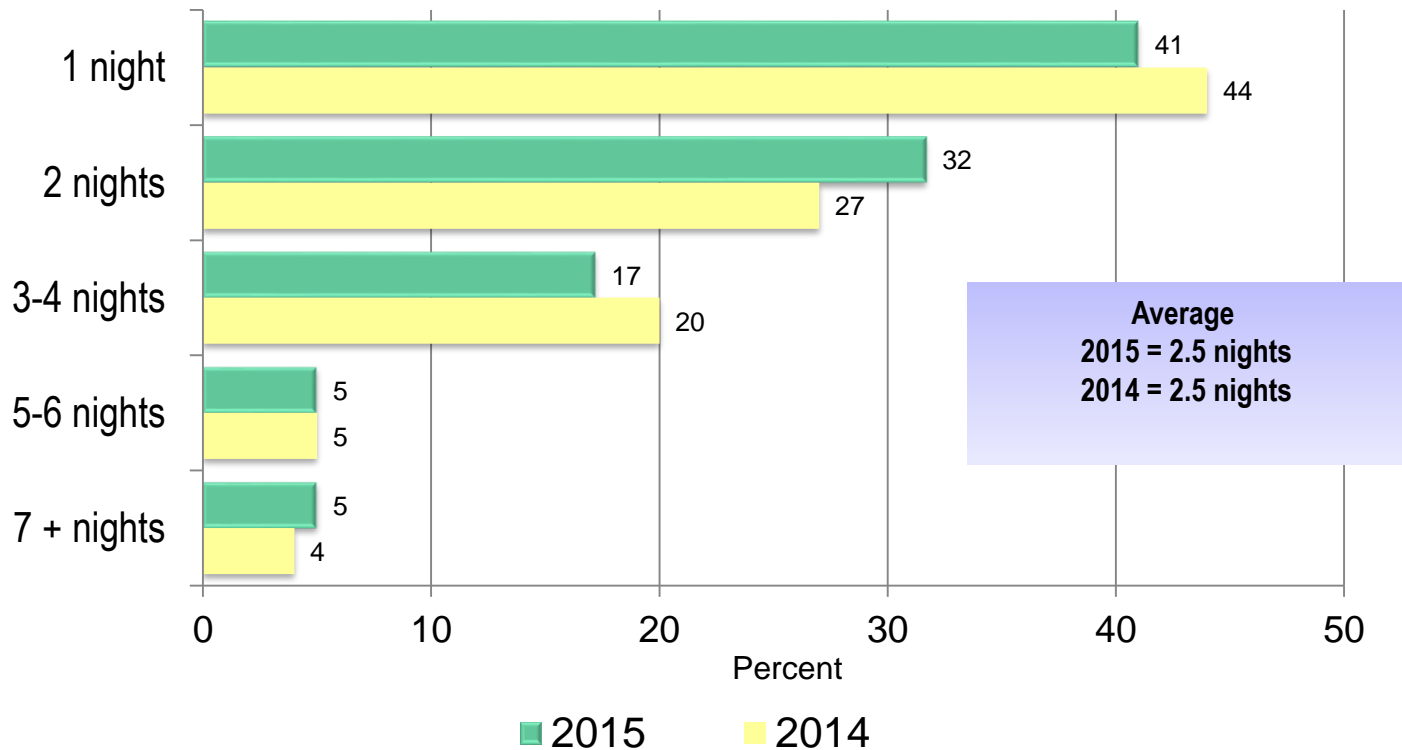
Average Nights Spent in Louisville = 2.5



Number of Nights Spent in Louisville 2015 vs. 2014



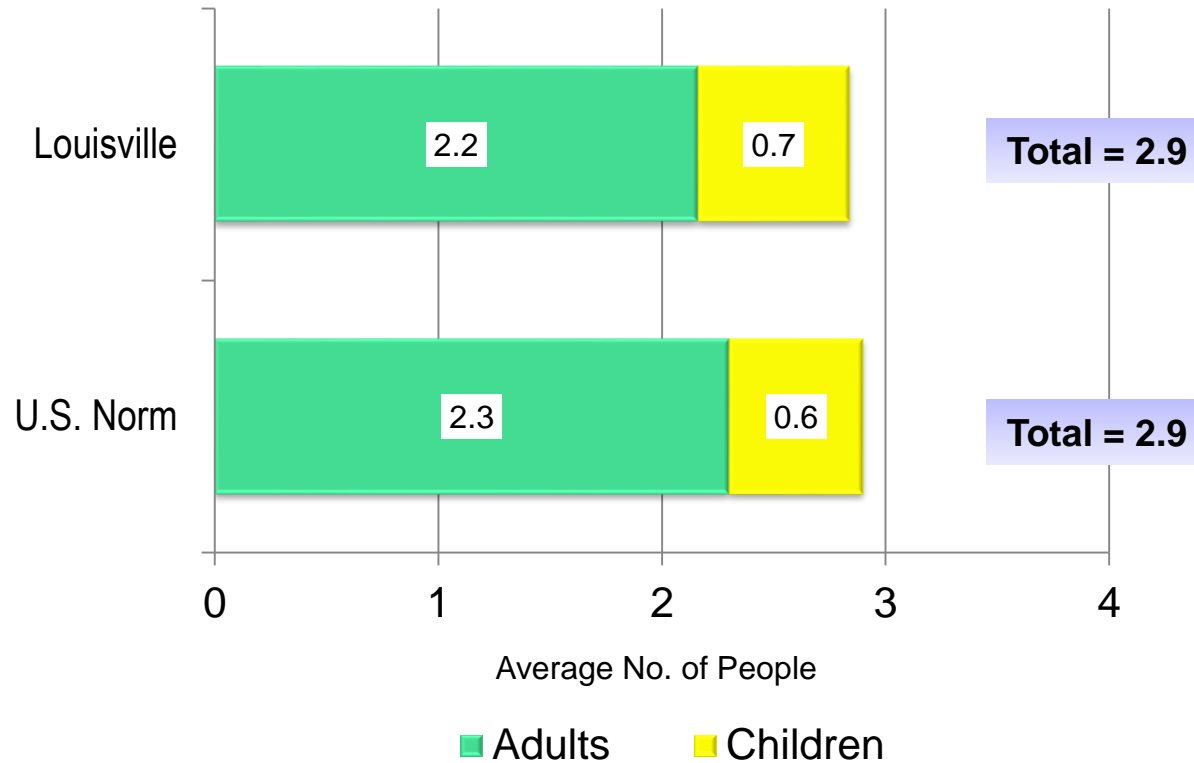
Base: Overnight Person-Trips with 1+ Nights Spent In Louisville



Size of Travel Party



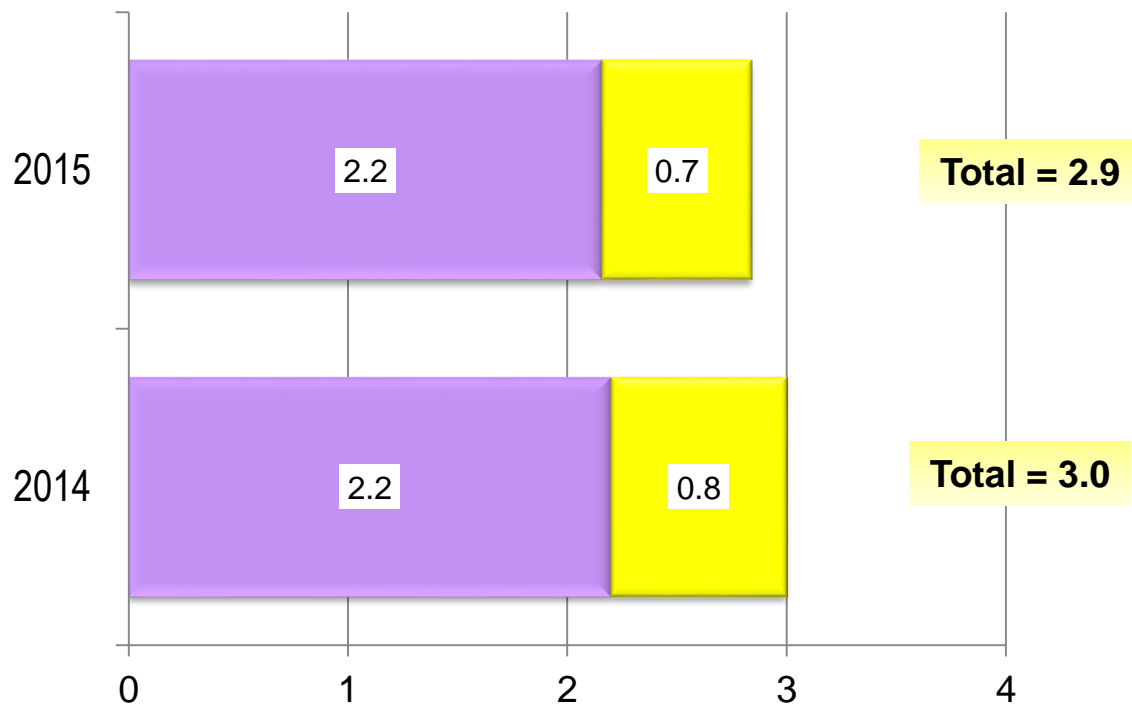
Base: Total Overnight Person-Trips



Size of Travel Party



Base: Overnight Marketable Person-Trips to Louisville



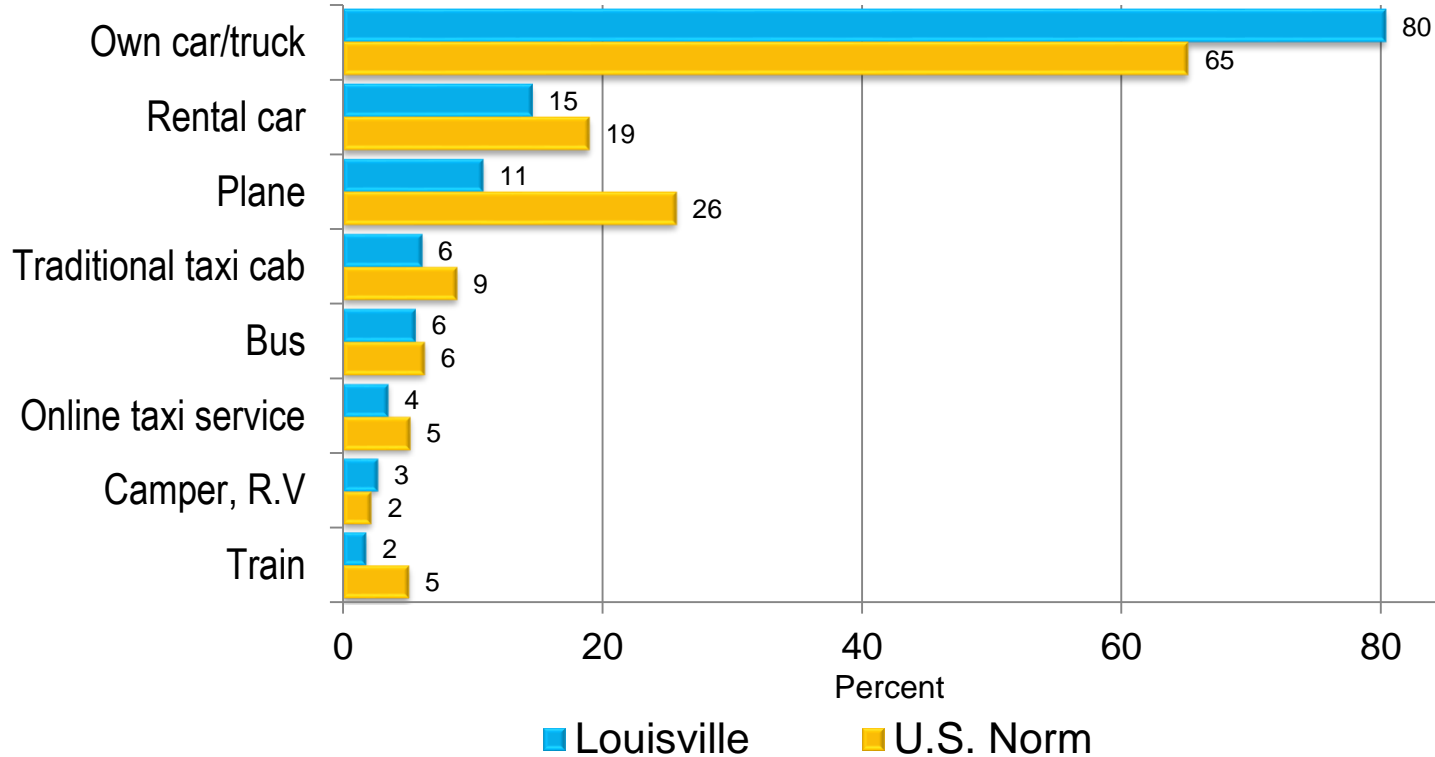
Average No. of People

■ Adults ■ Children under 18

Transportation



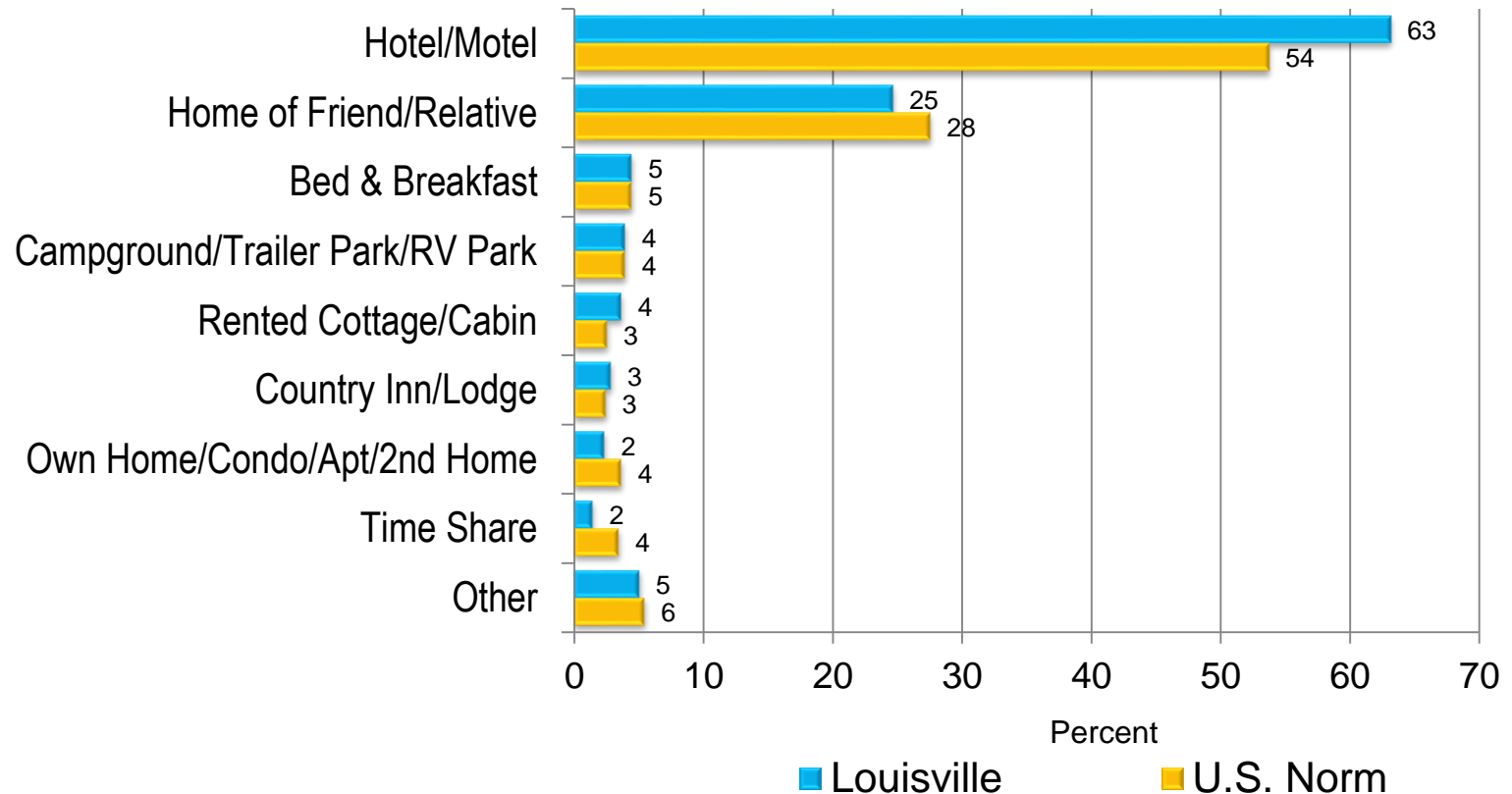
Base: Total Overnight Person-Trips



Accommodations



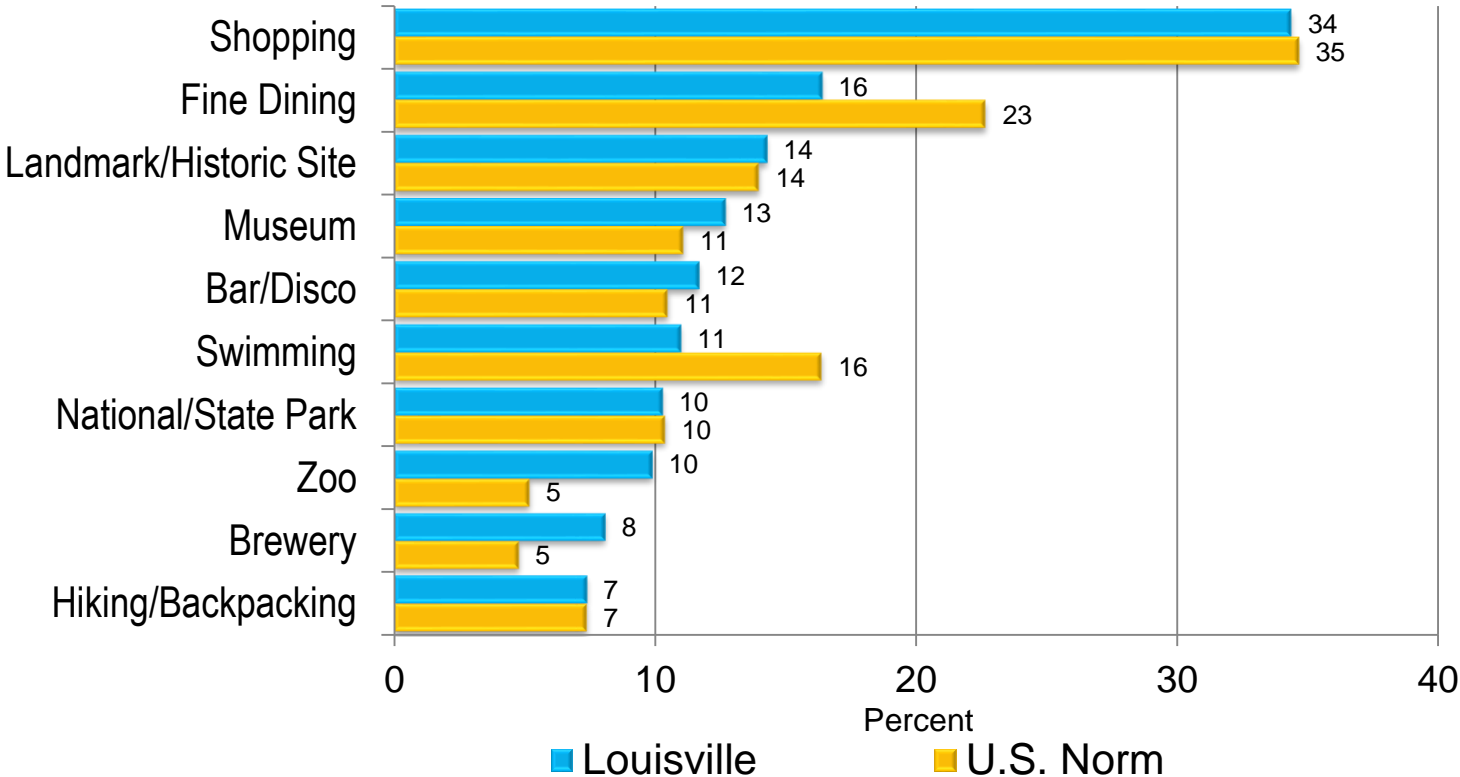
Base: Total Overnight Person-Trips



Activities and Experiences



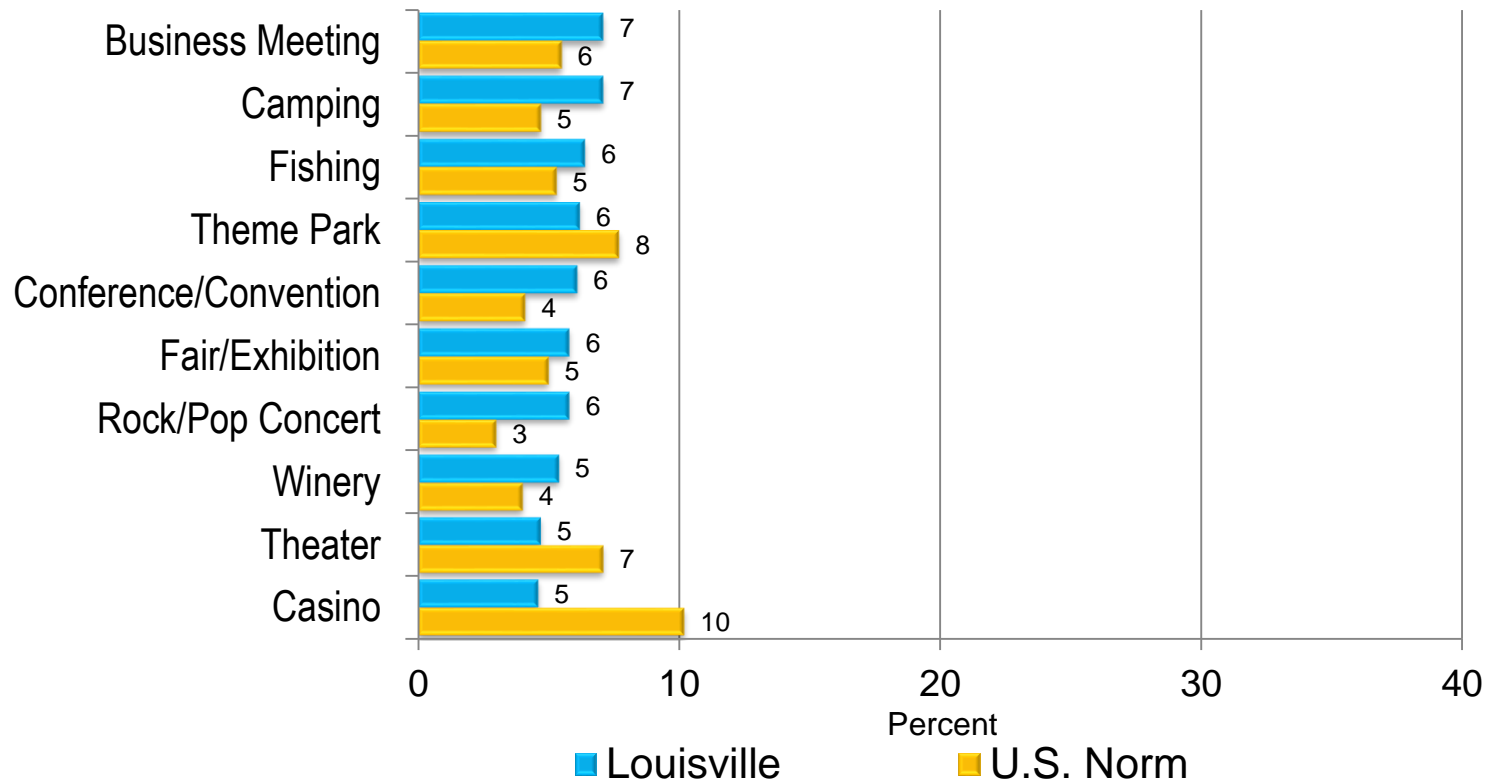
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



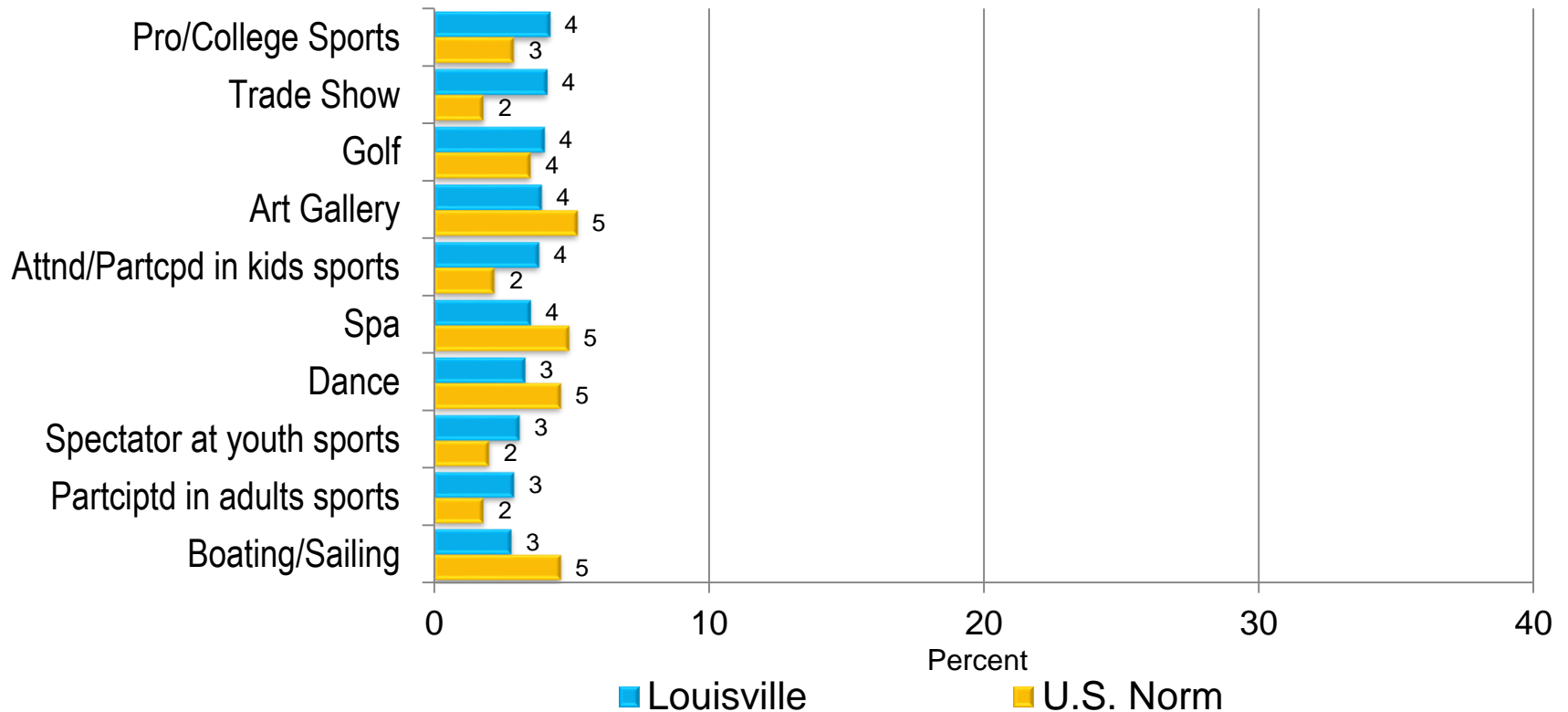
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



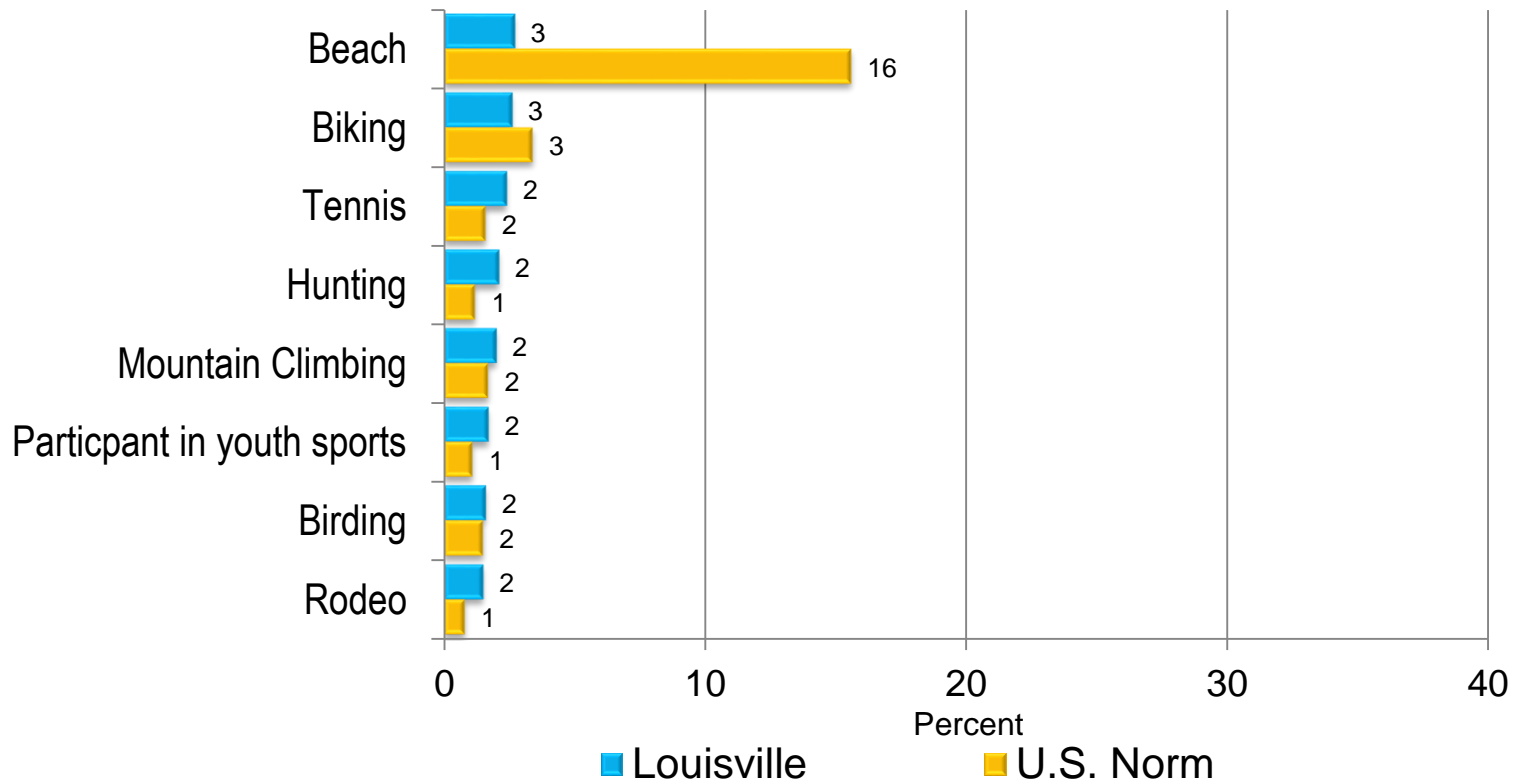
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



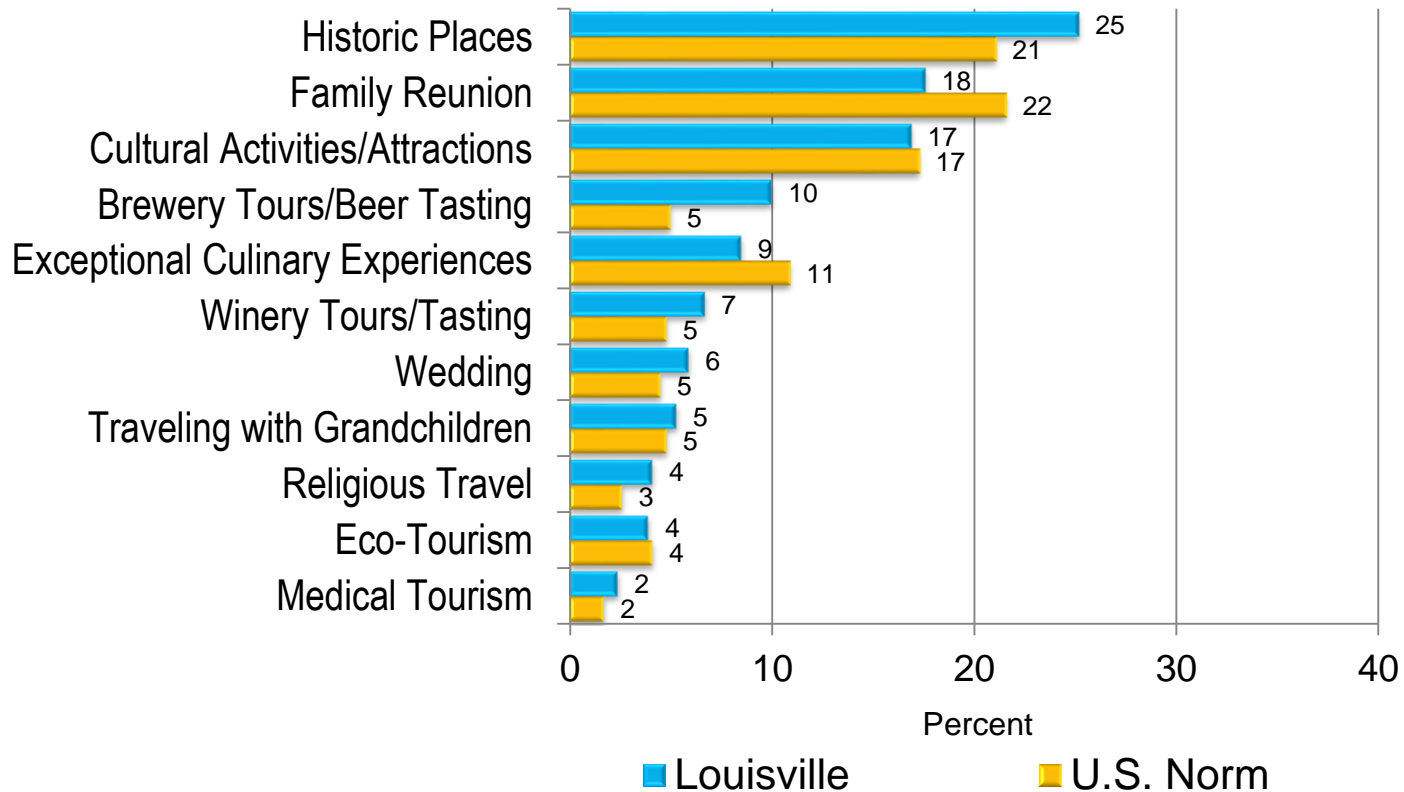
Base: Total Overnight Person-Trips



Activities of Special Interest



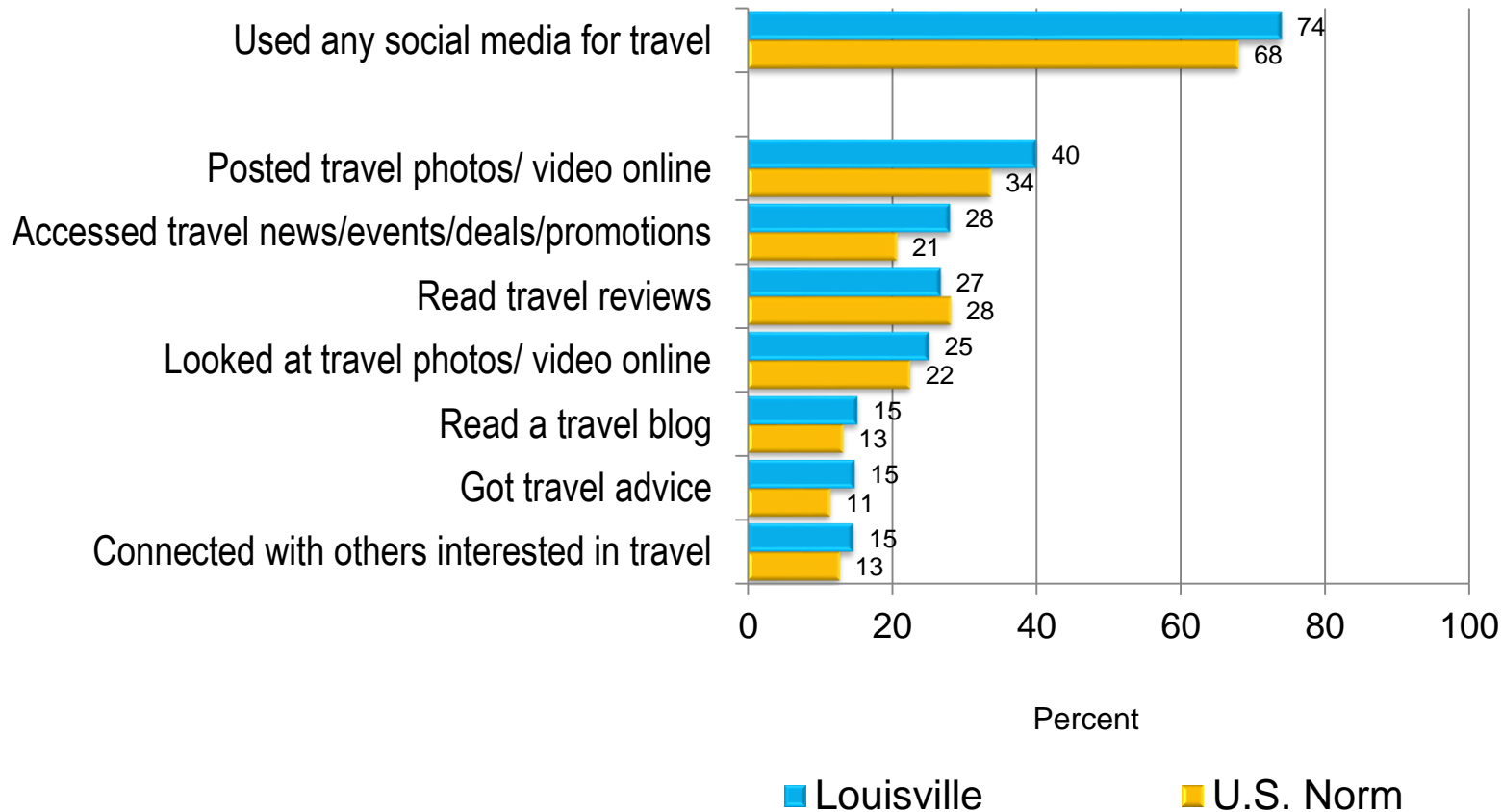
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



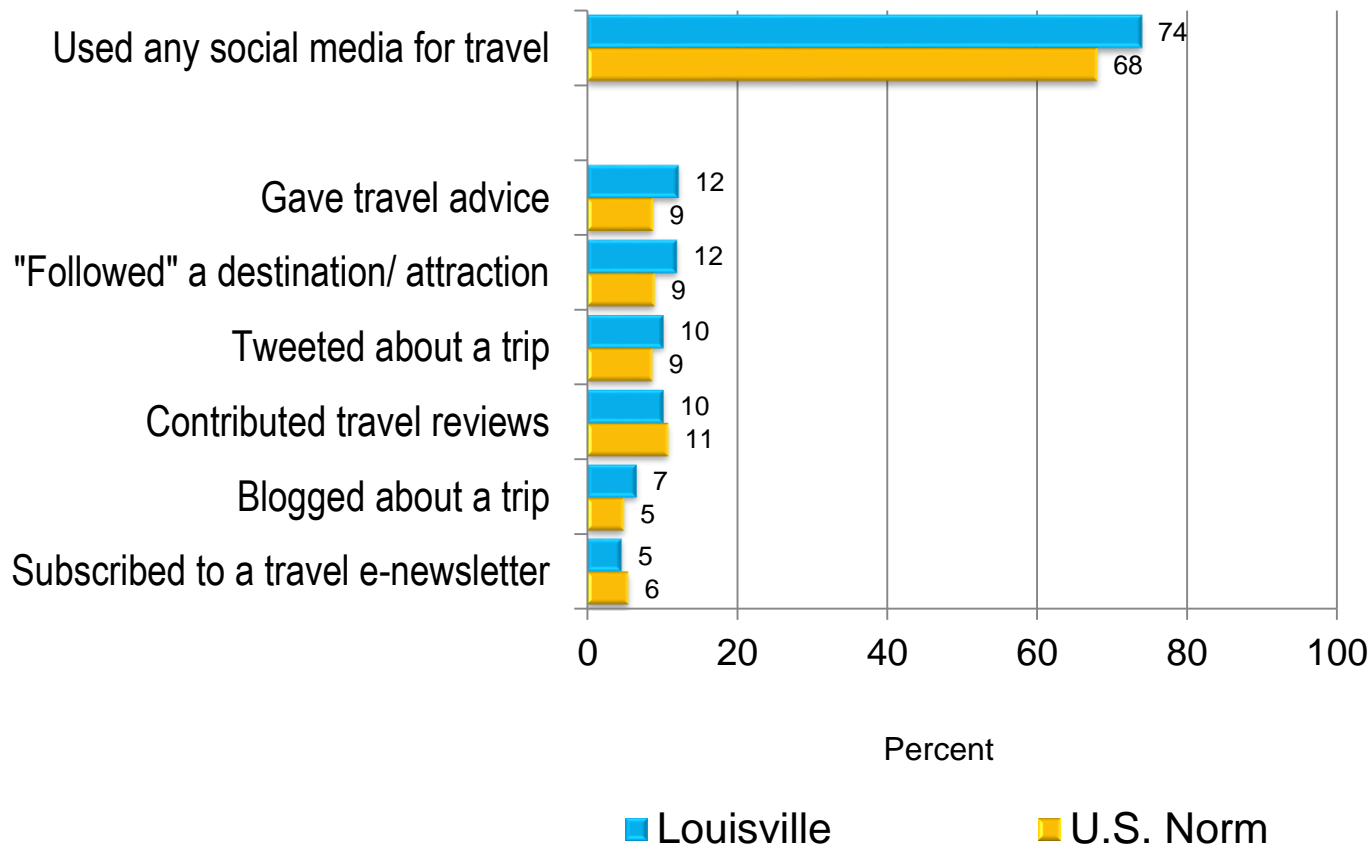
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers – (Cont'd)



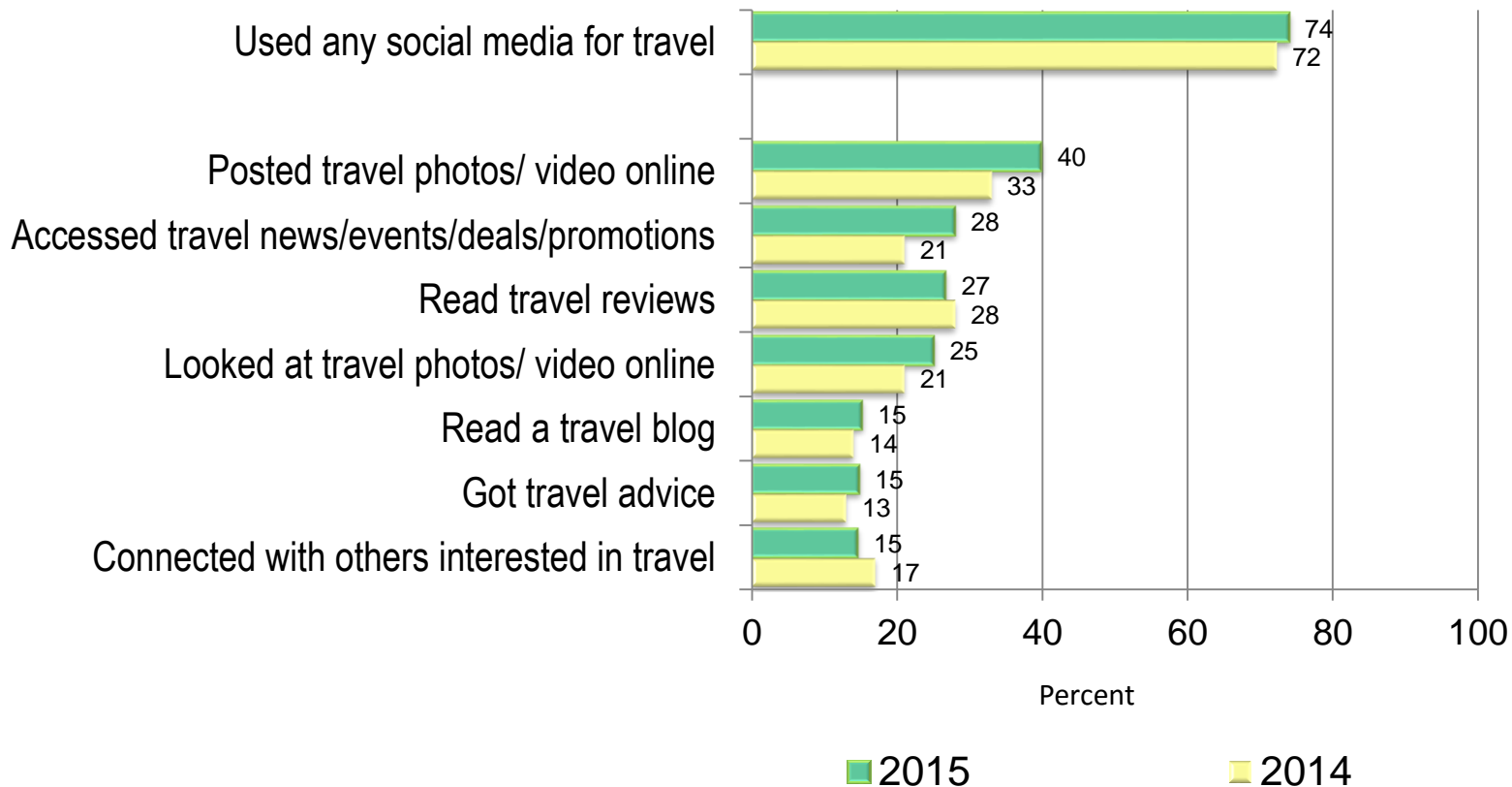
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers in Louisville – 2015 vs. 2014



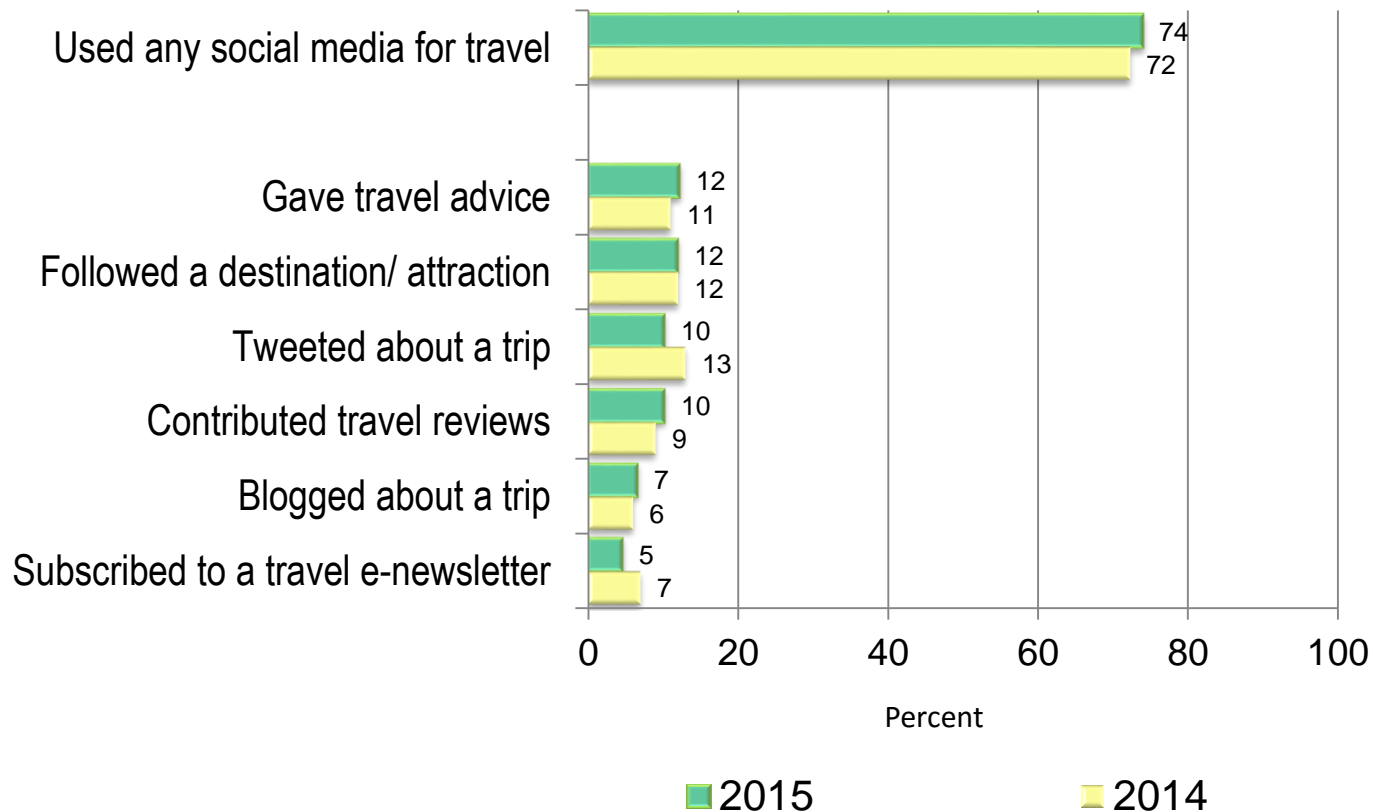
Base: Total Overnight Person-Trips to Louisville



Online Social Media Use by Travelers in Louisville – 2015 vs. 2014 – (Cont'd)



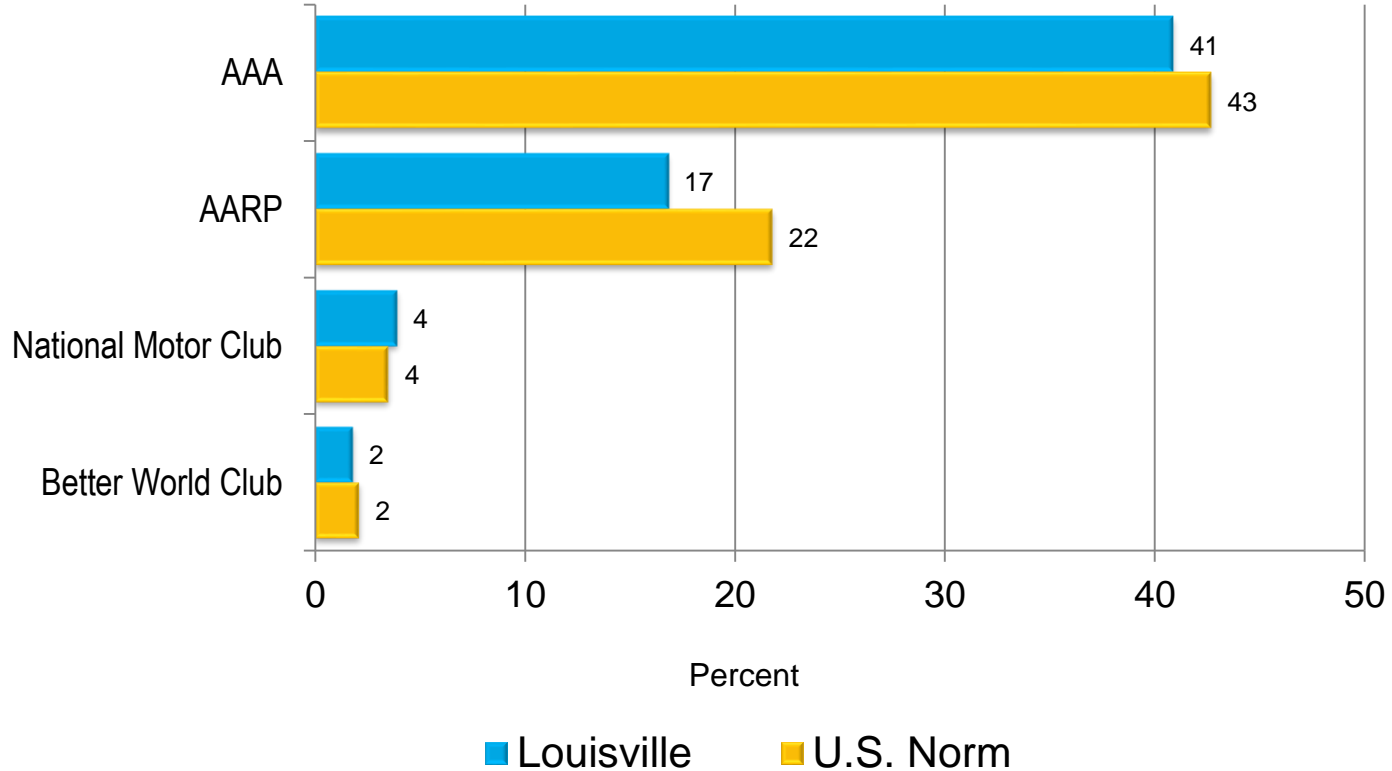
Base: Total Overnight Person-Trips to Louisville



Organization Membership



Base: Total Overnight Person-Trips



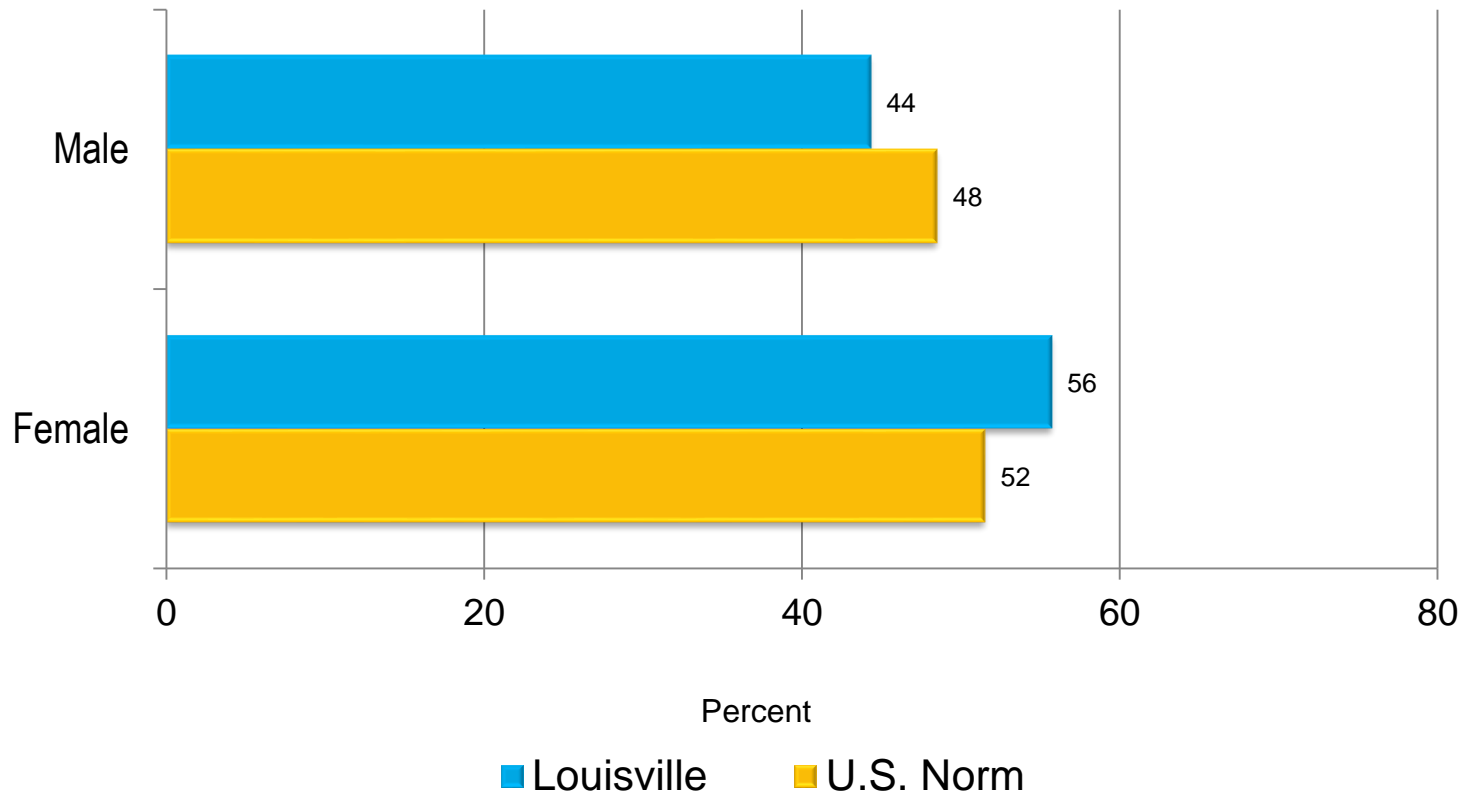


Demographic Profile of Overnight Visitors

Gender



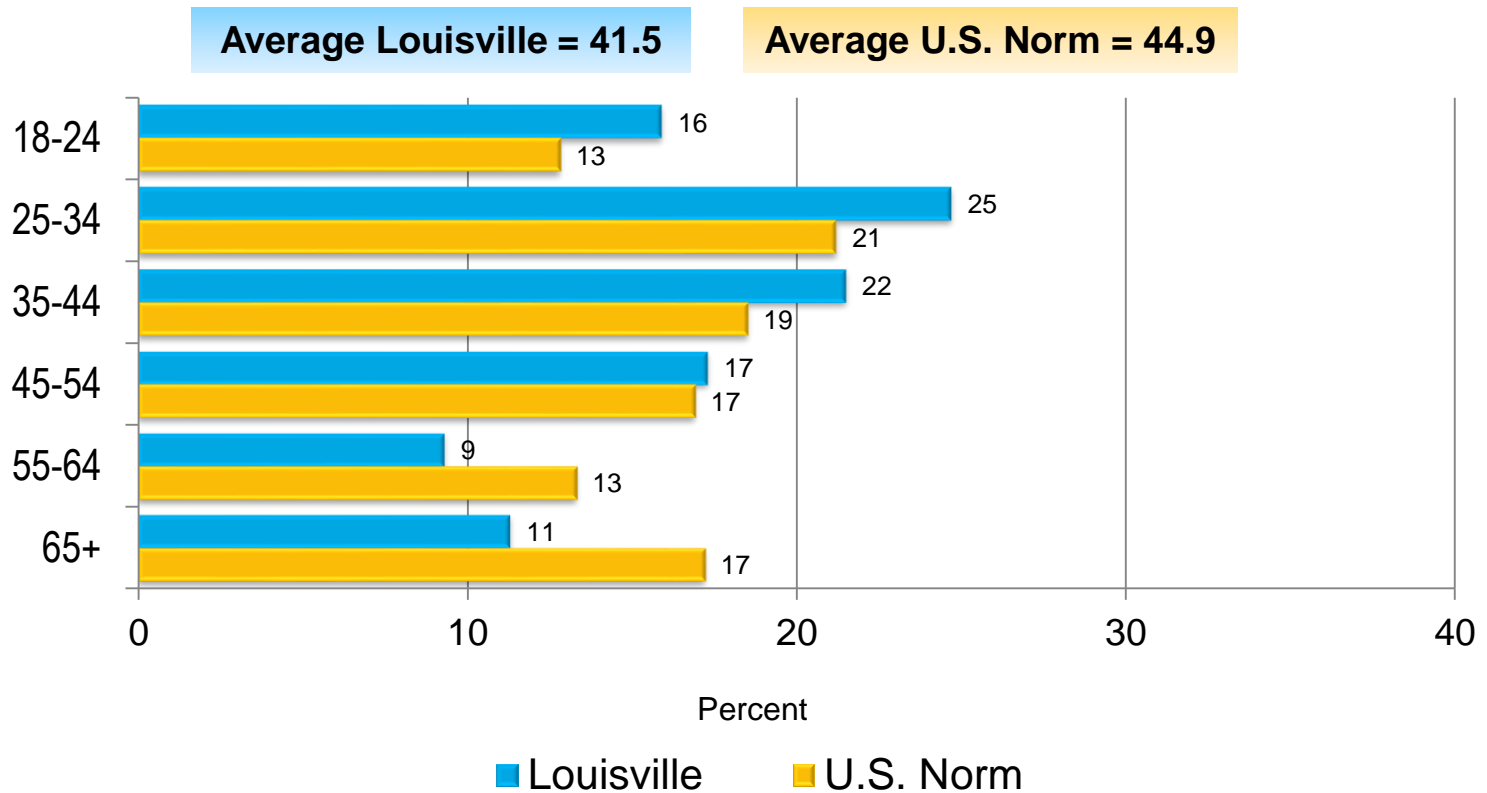
Base: Total Overnight Person-Trips



Age



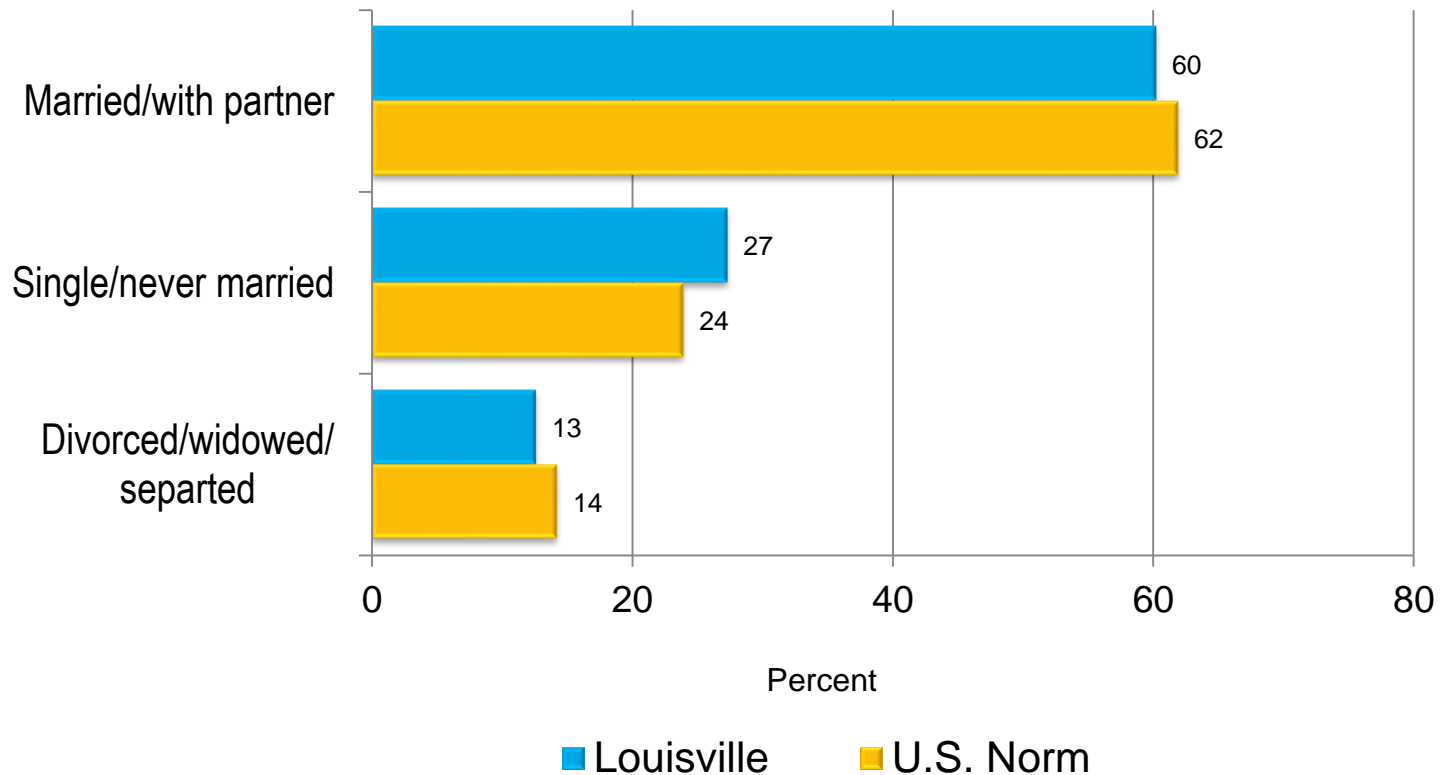
Base: Total Overnight Person-Trips



Marital Status



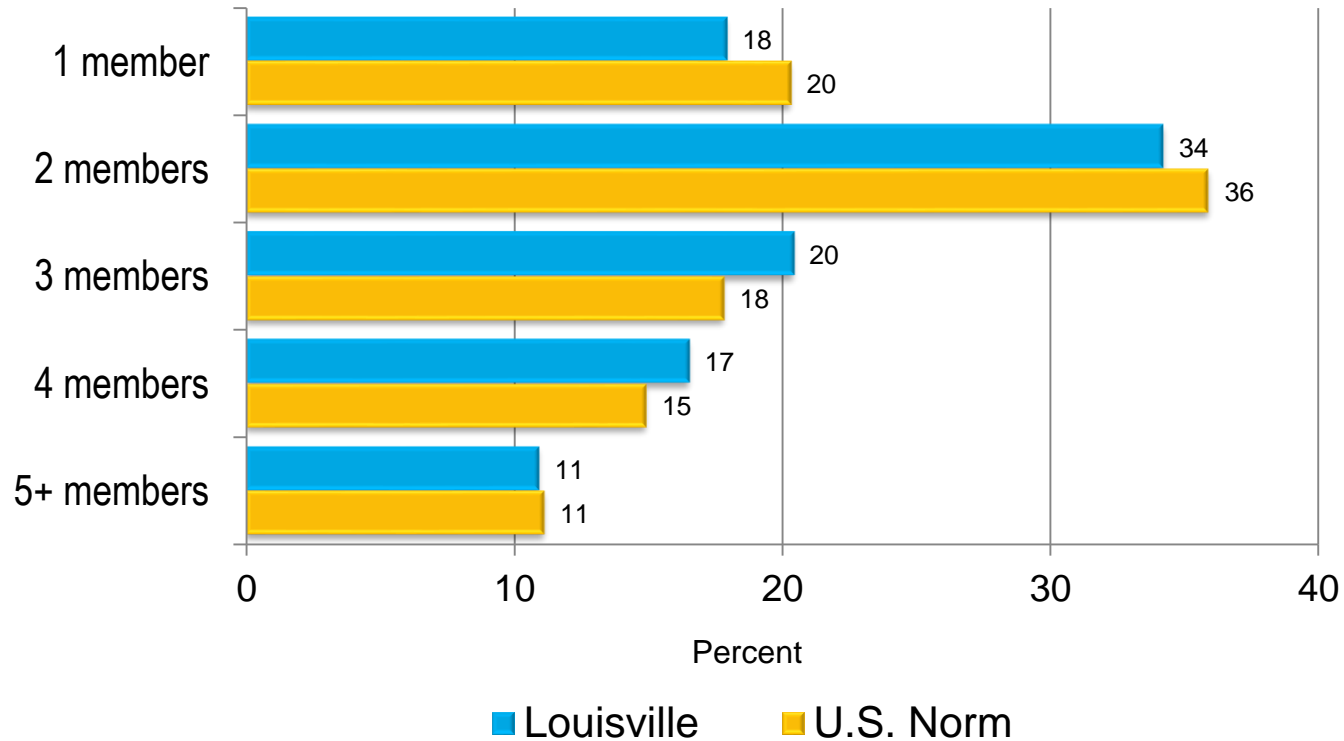
Base: Total Overnight Person-Trips



Household Size



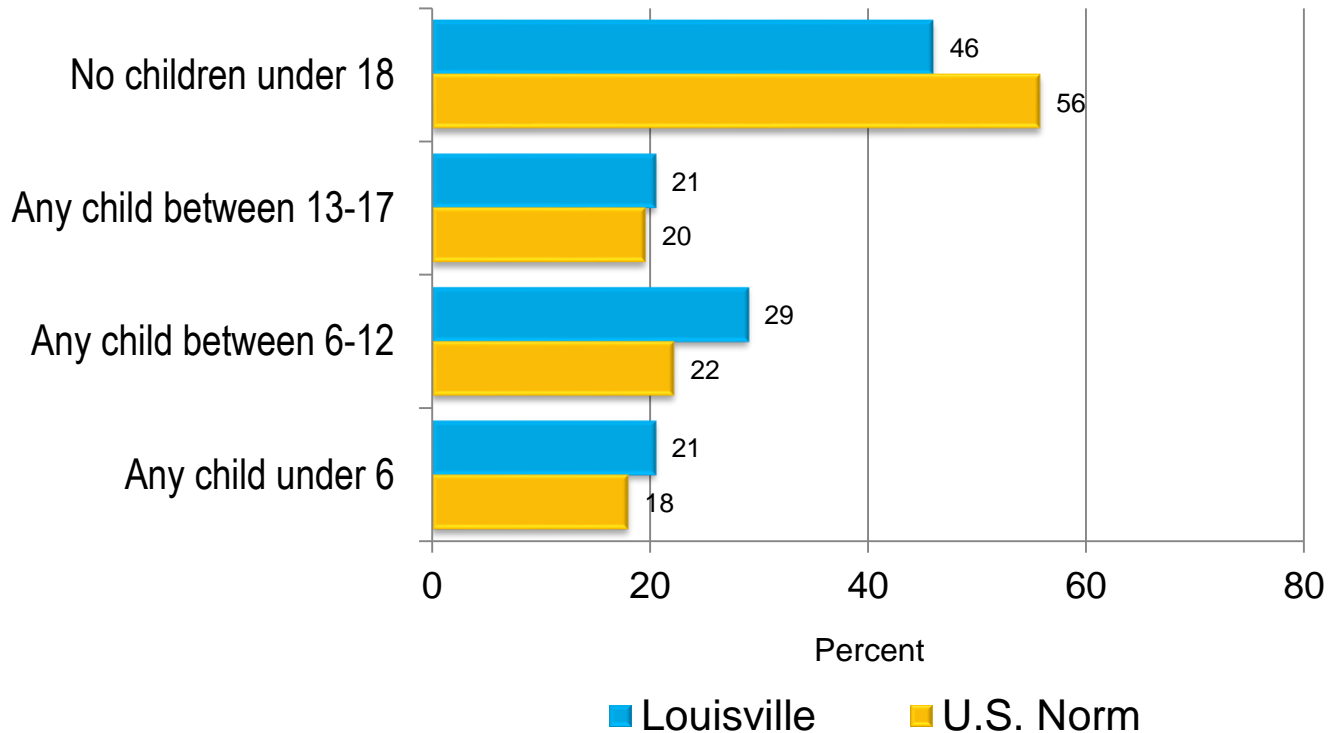
Base: Total Overnight Person-Trips



Children in Household



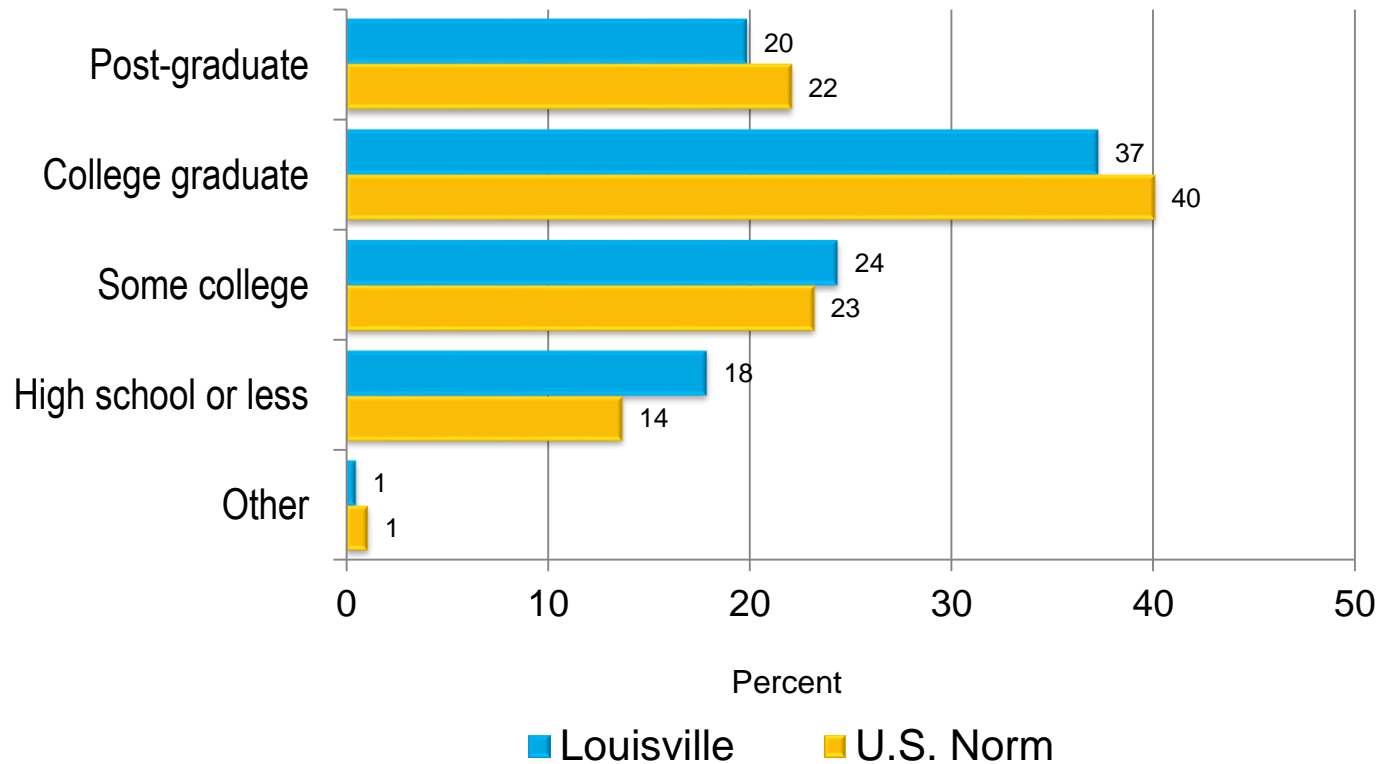
Base: Total Overnight Person Trips



Education



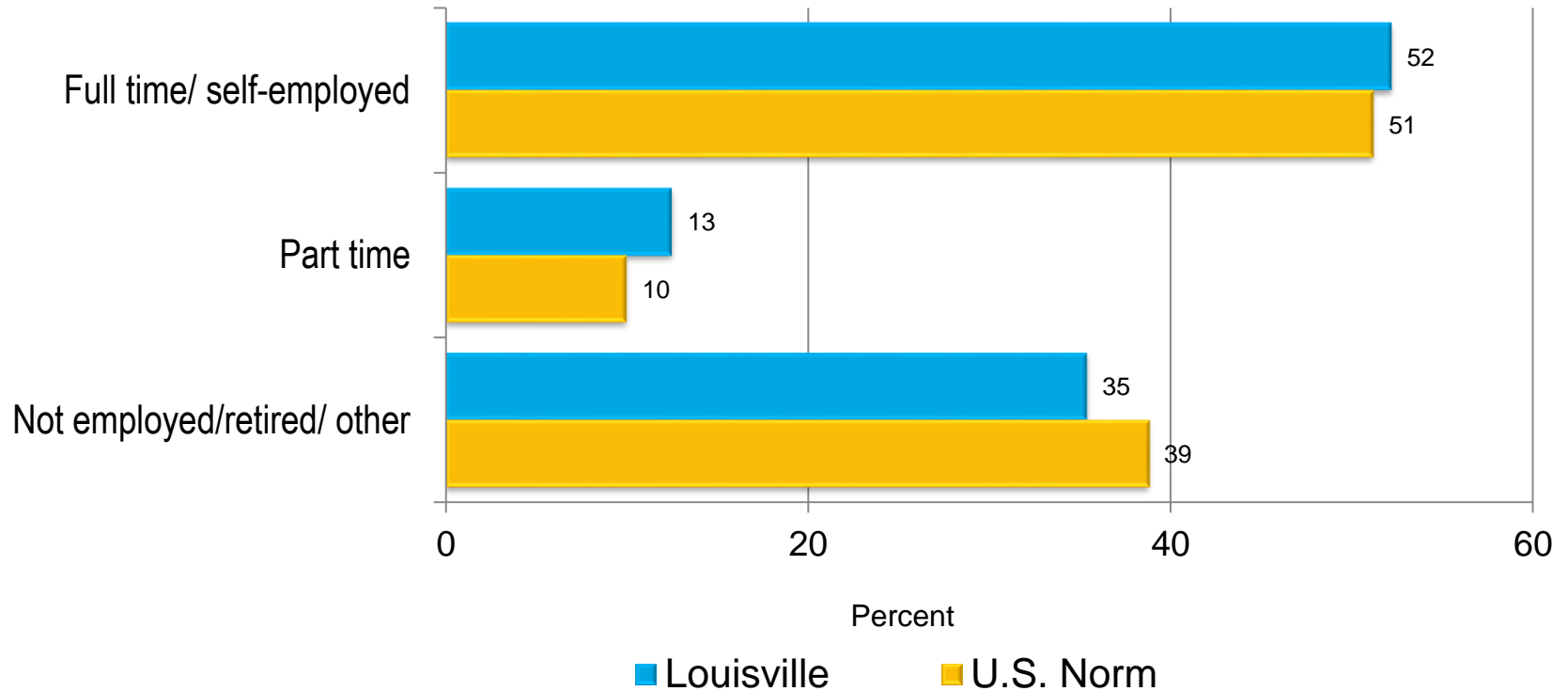
Base: Total Overnight Person-Trips



Employment



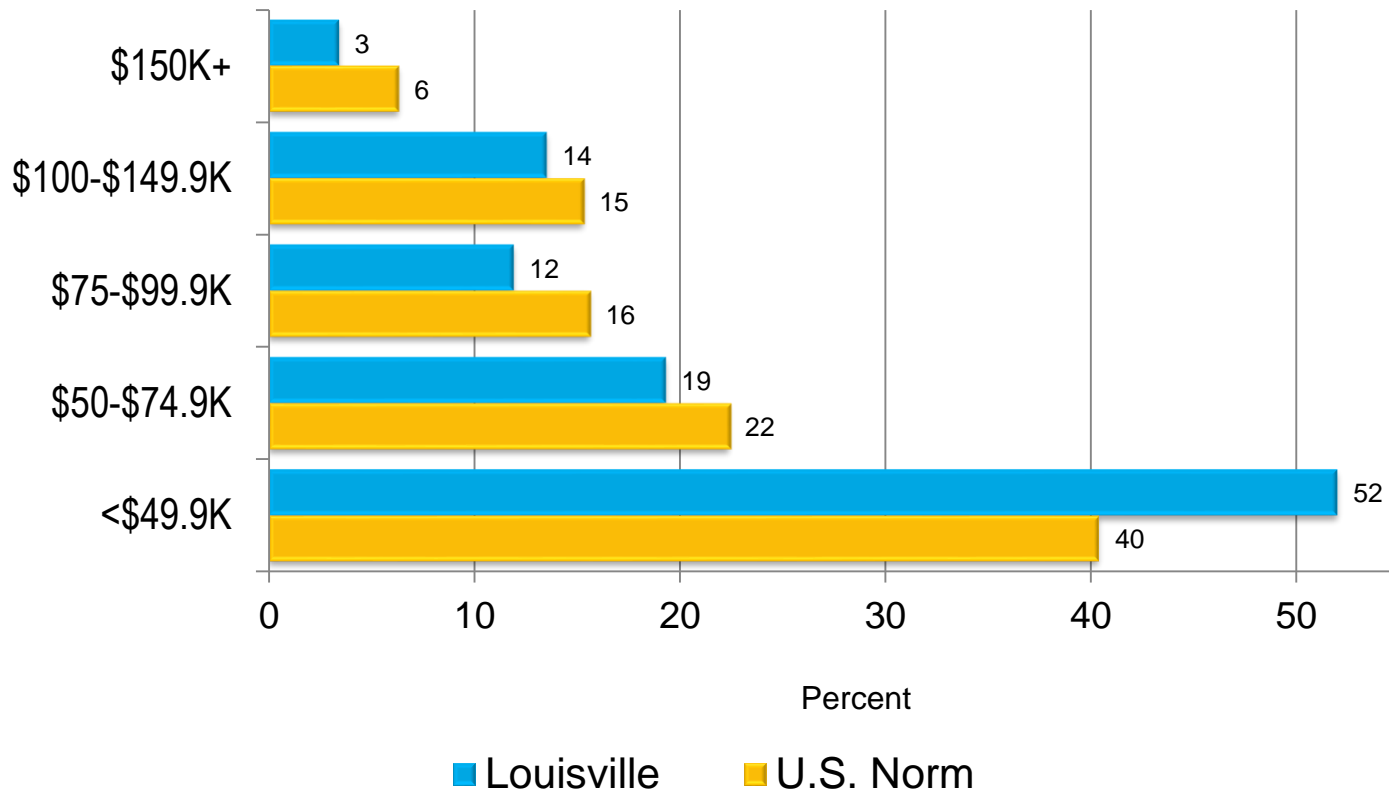
Base: Total Overnight Person-Trips



Household Income



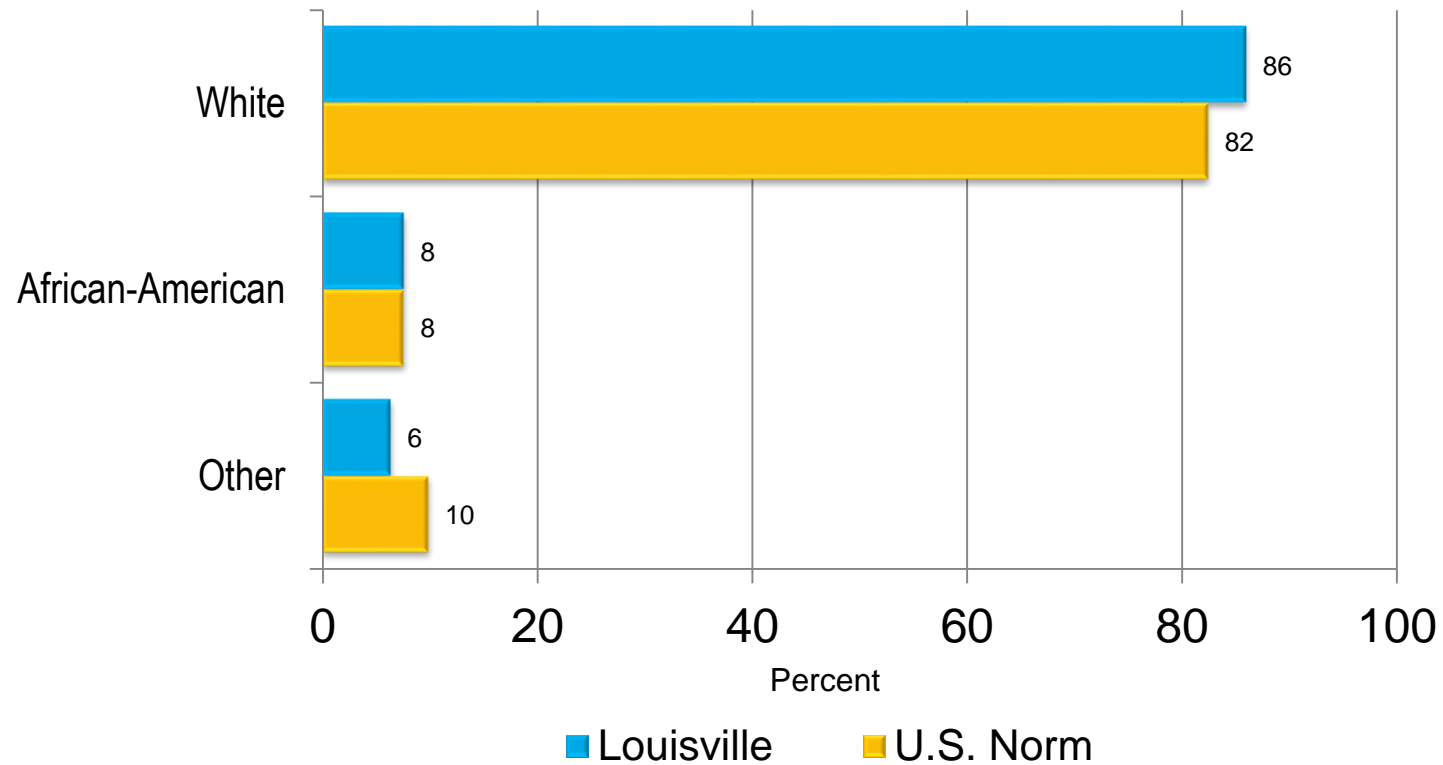
Base: Total Overnight Person-Trips



Race



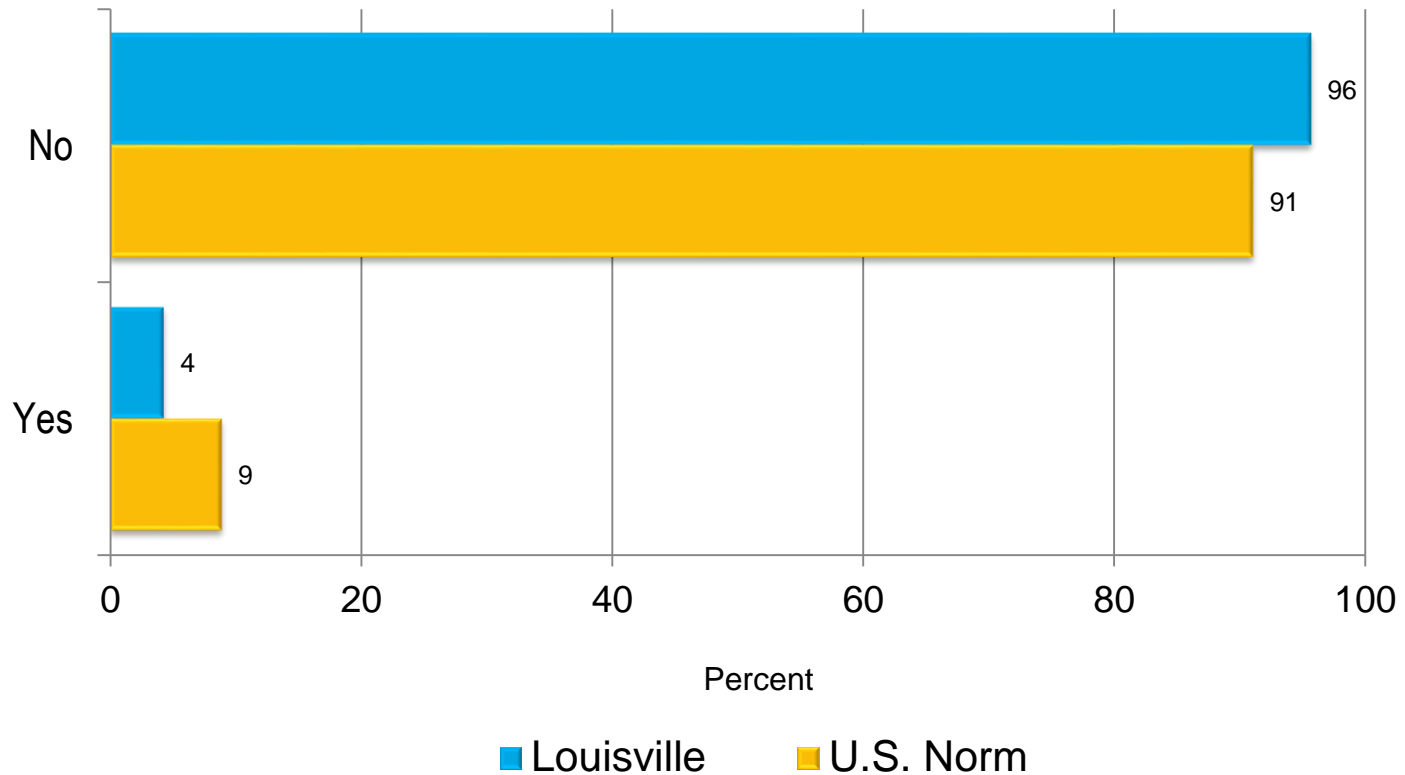
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Day Trip Detail



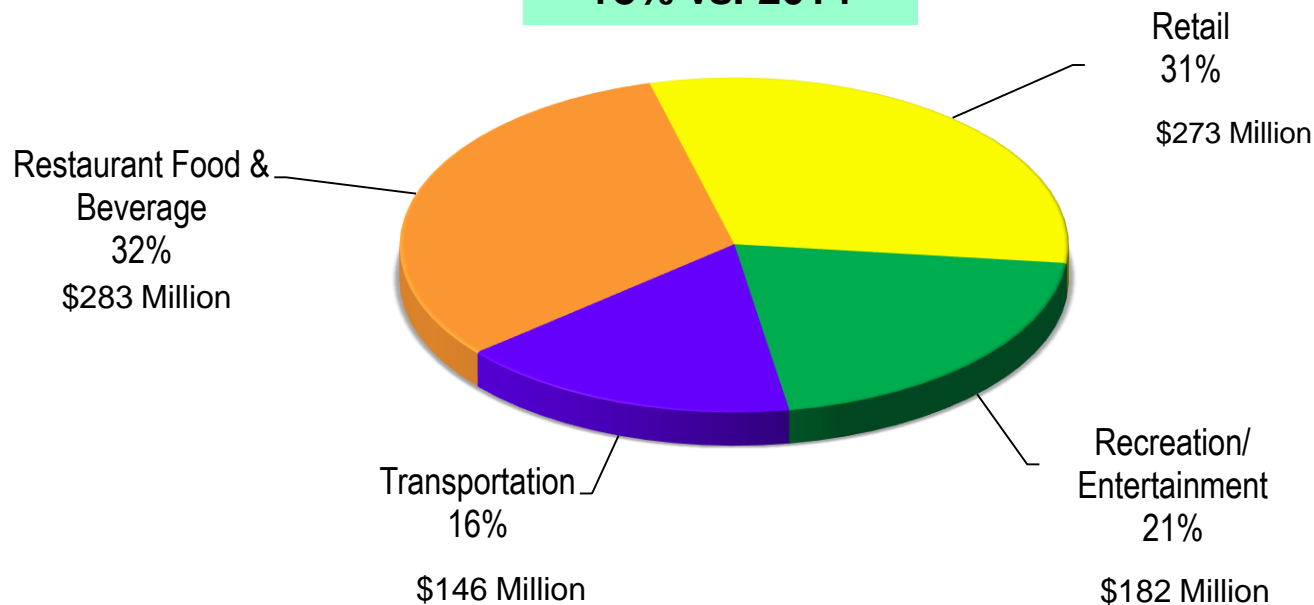
Day Trip Expenditures

Total Louisville Domestic Day Trip Spending – by Sector



Total Spending = \$884 Billion

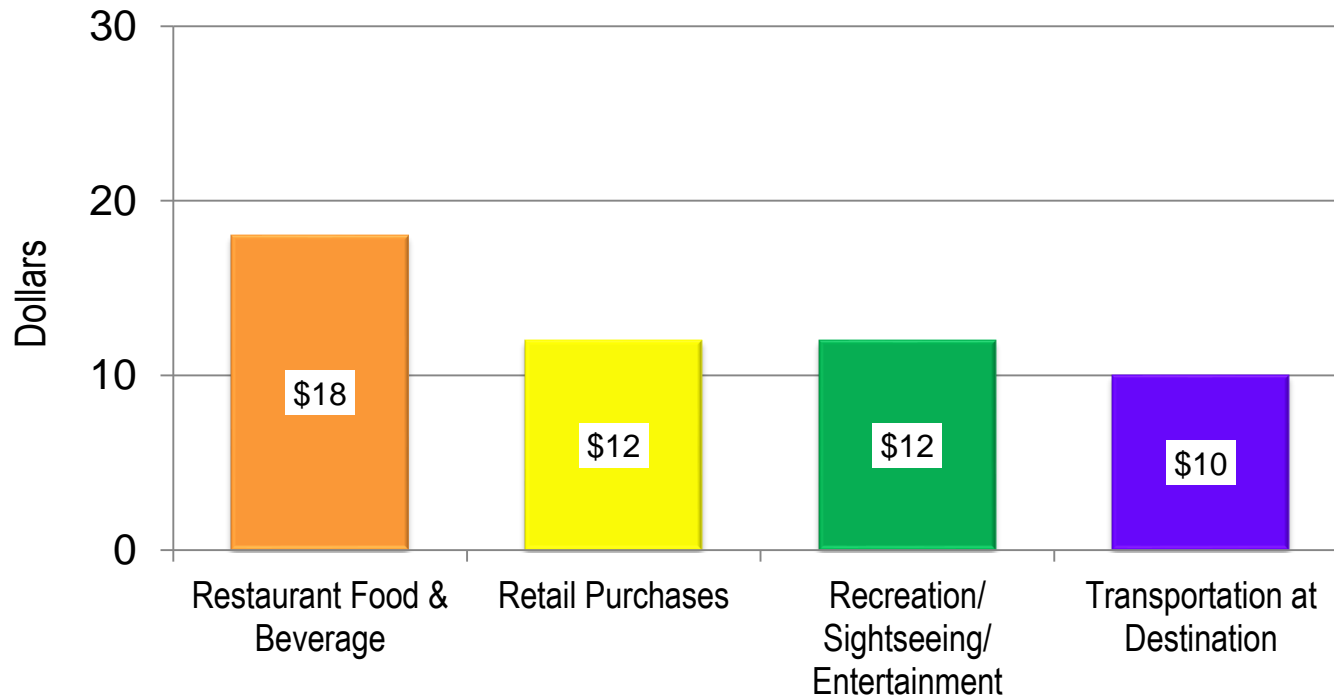
+8% vs. 2014



Average Per Person Expenditures on Day Trips – By Sector



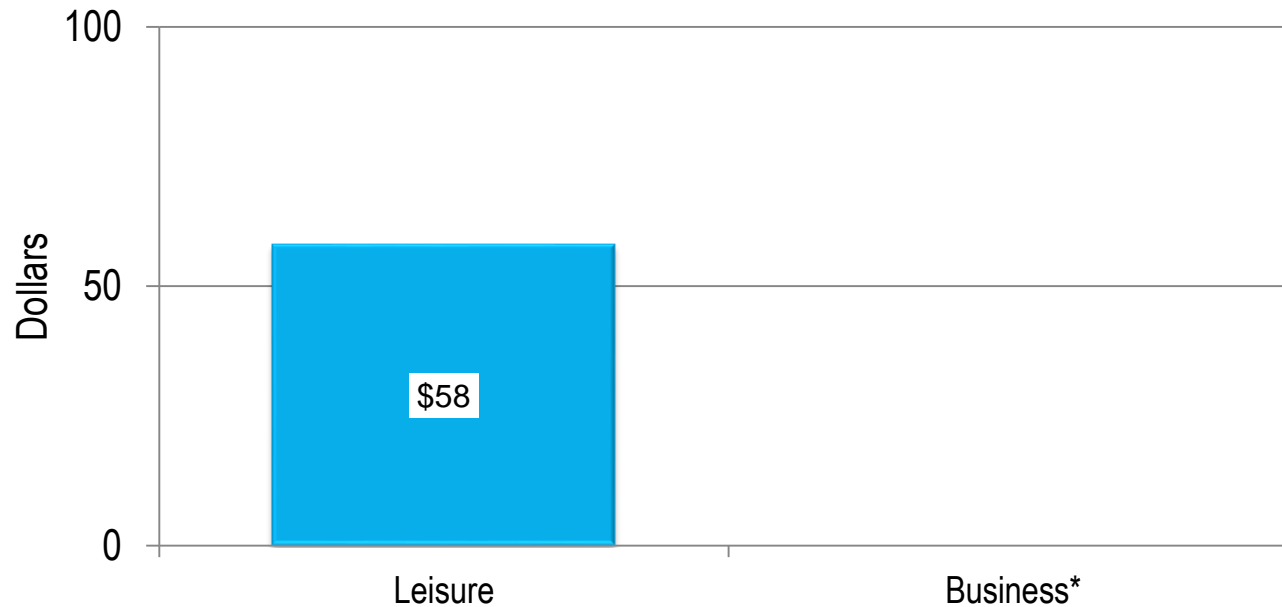
Base: Total Day Person-Trips to Louisville



Average Per Person Expenditures on Day Trips – by Trip Purpose



Base: Total Day Person-Trips to Louisville

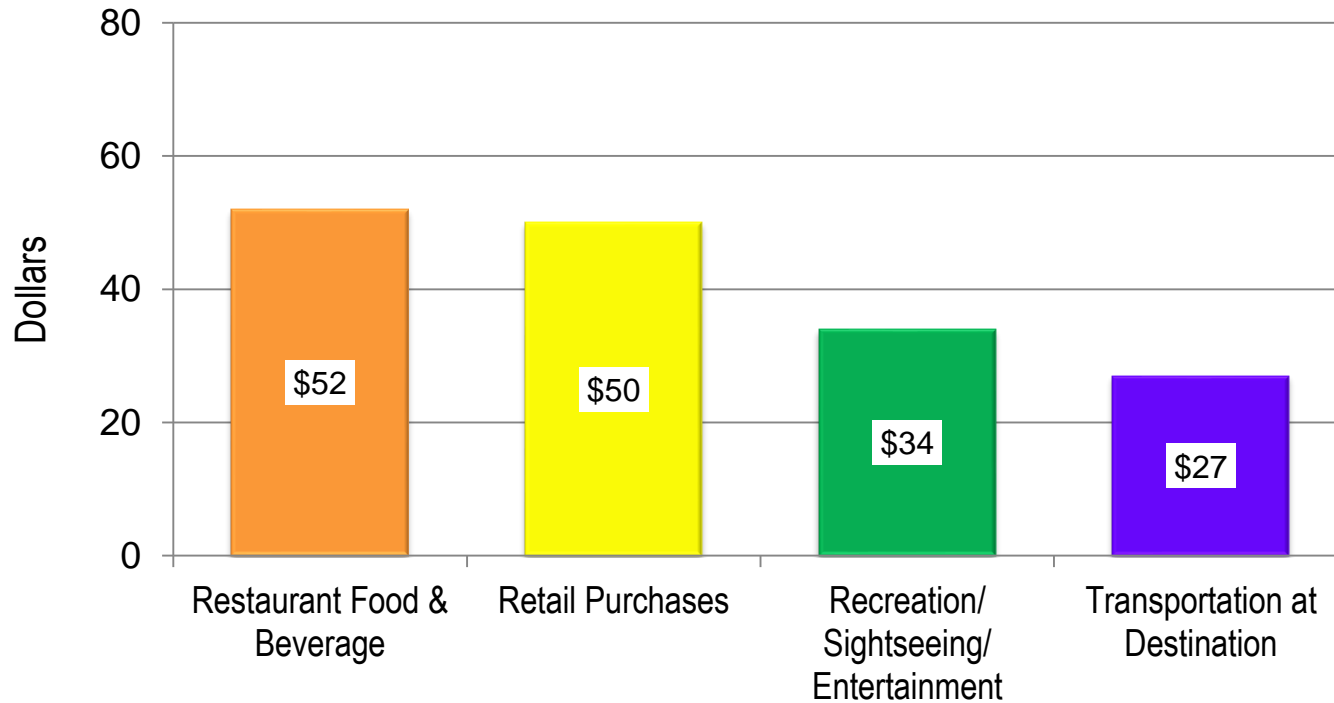


* Low base sizes

Average Per Party Expenditures on Day Trips – By Sector



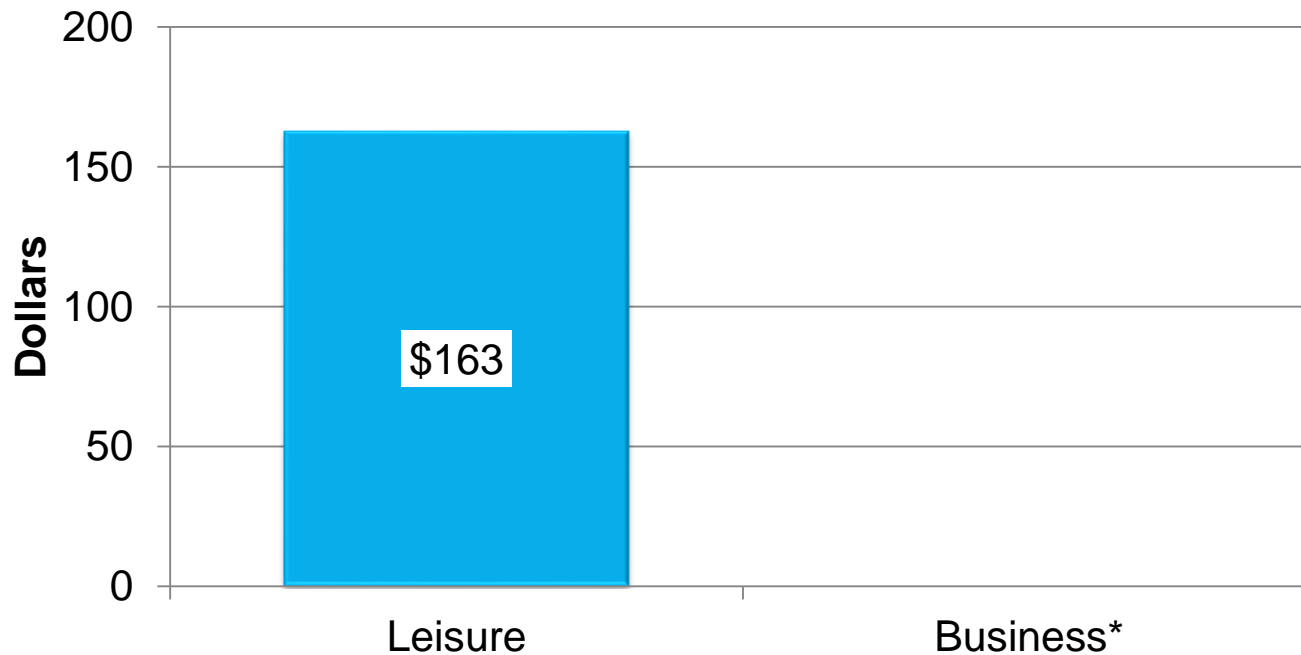
Base: Total Day Person-Trips to Louisville



Average Per Party Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips to Louisville



* Low base sizes

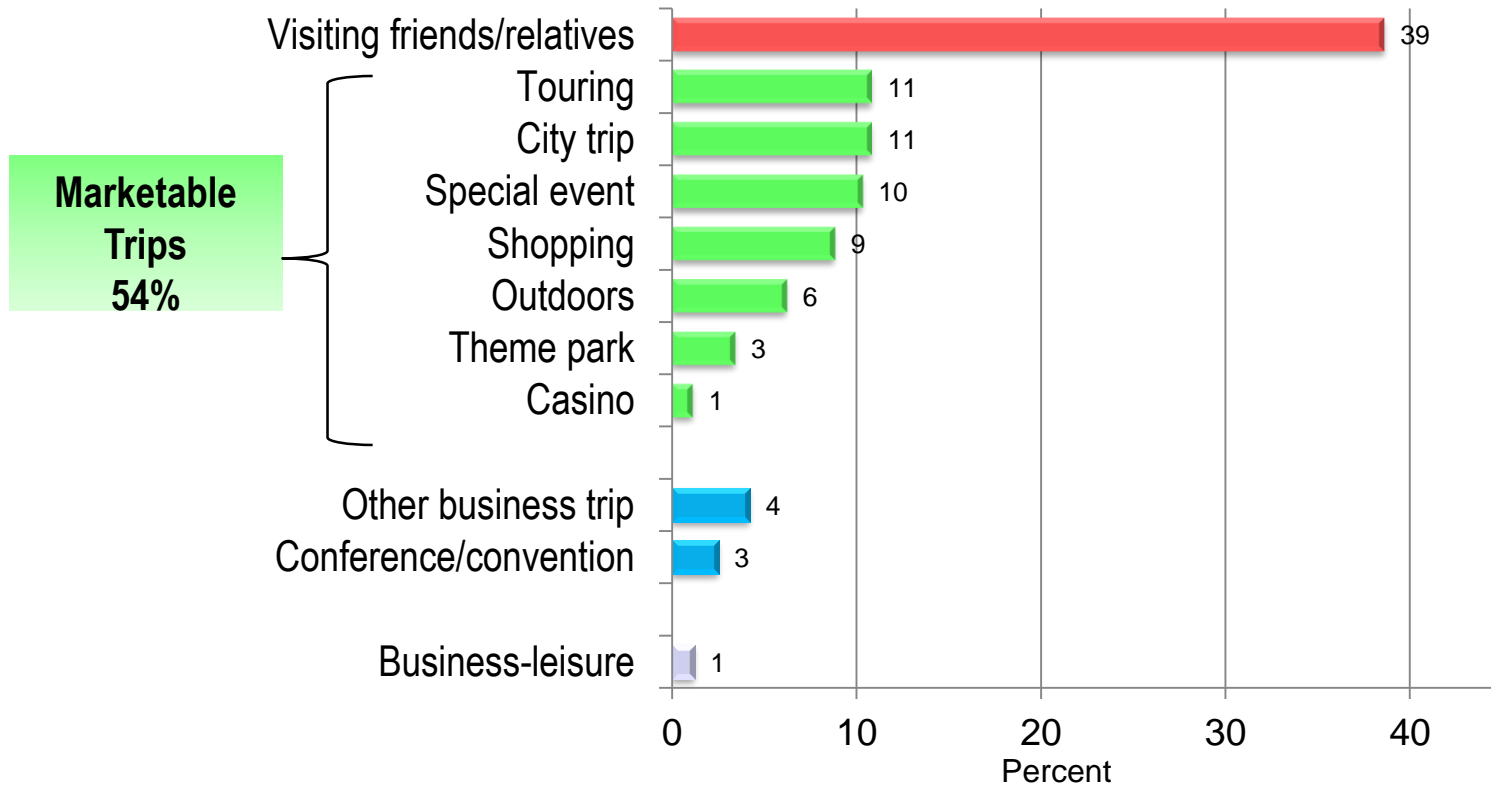


Day Trip Characteristics

Main Purpose of Trip



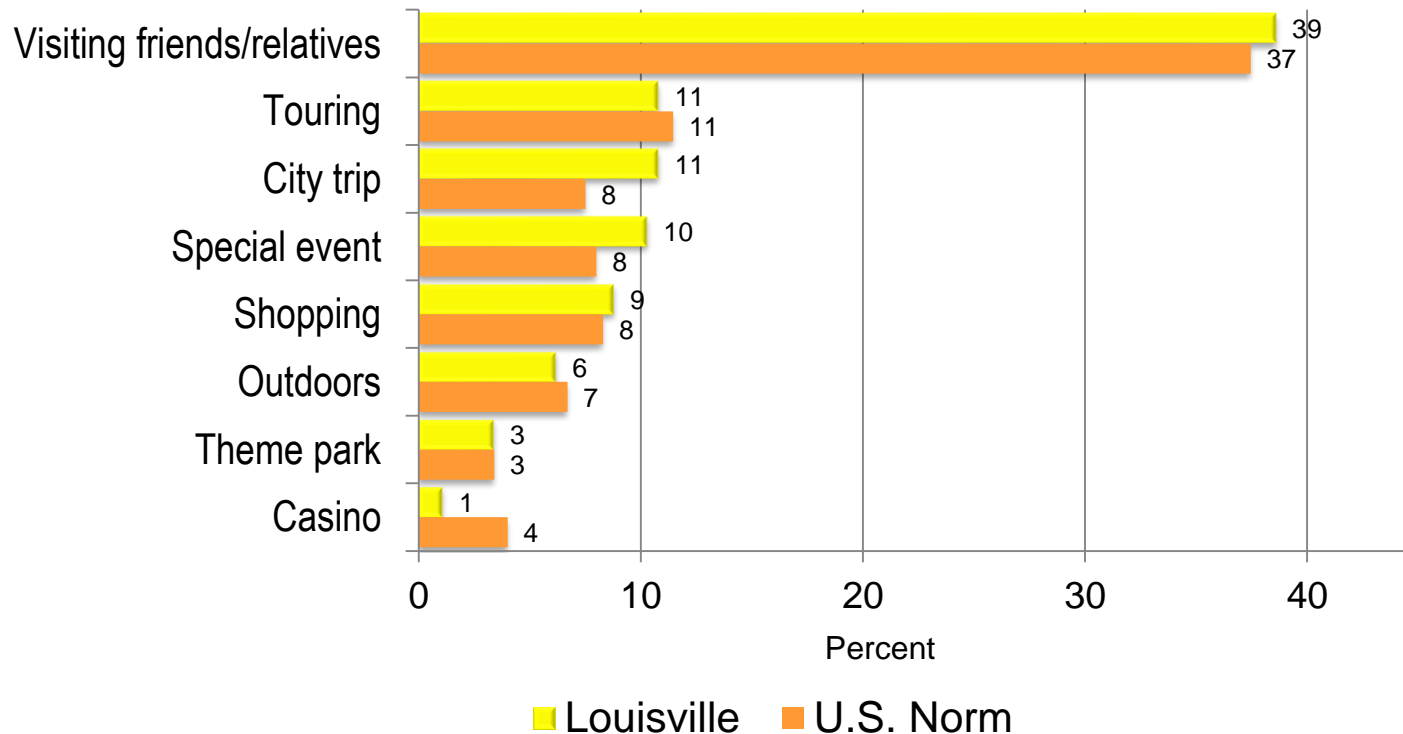
Base: Total Day Person-Trips to Louisville



Main Purpose of Leisure Trip — Louisville vs. National Norm



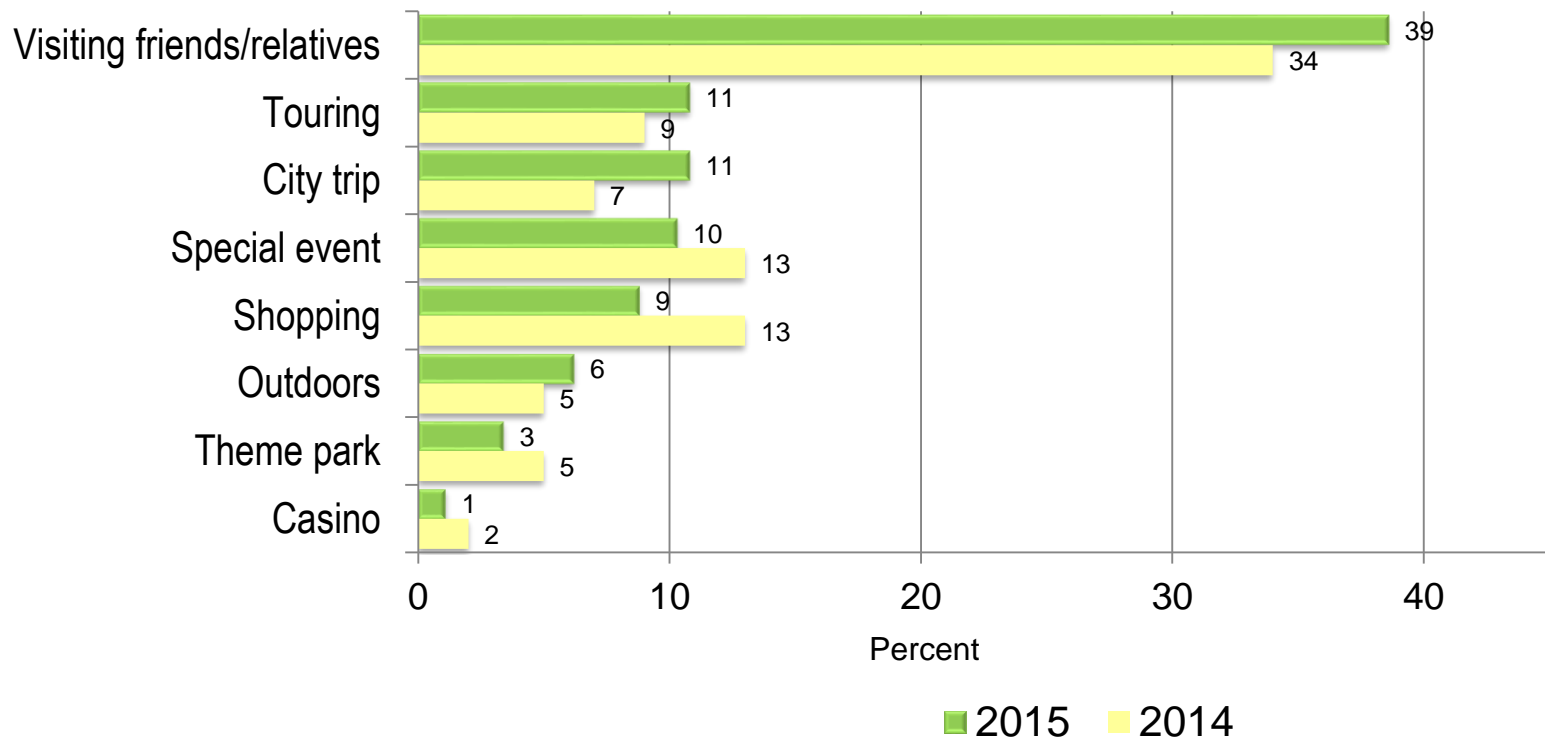
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Main Purpose of Day Leisure Trip to Louisville – 2015 vs. 2014



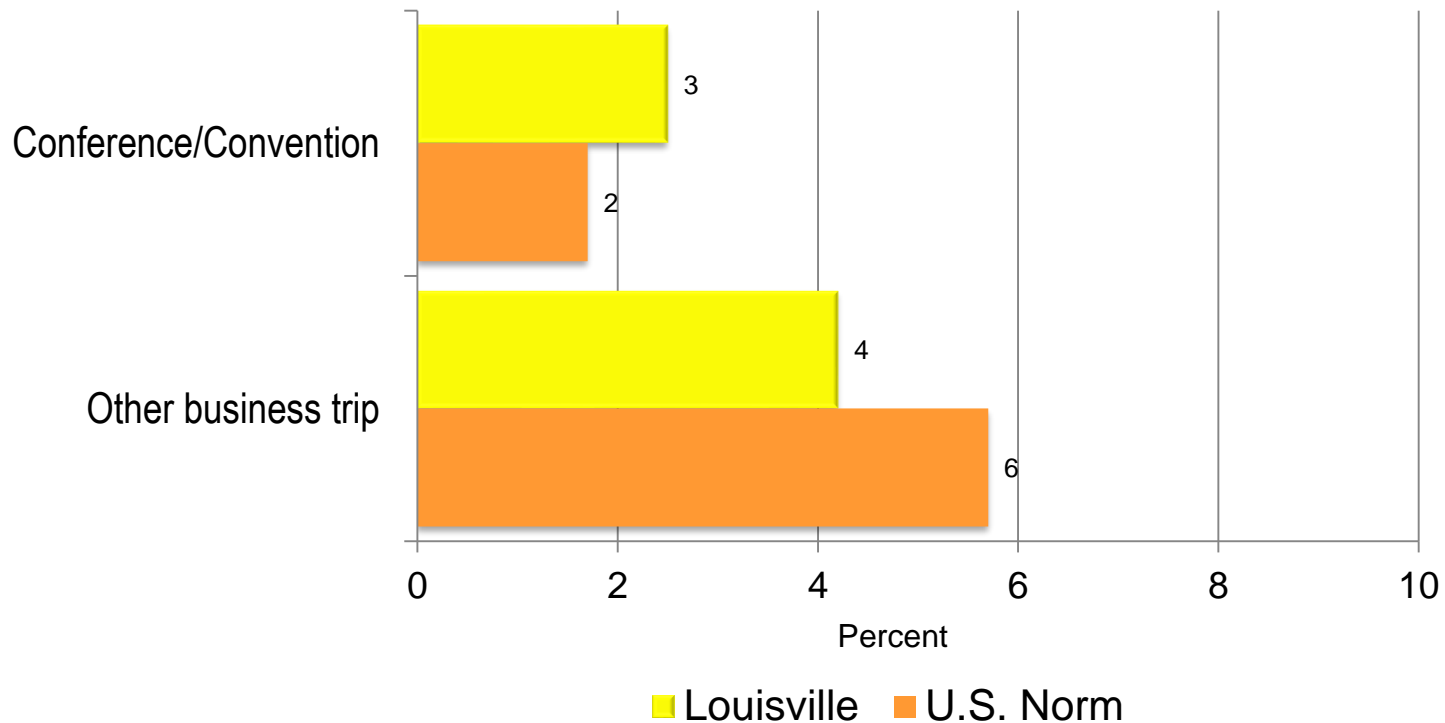
Base: Total Day Person-Trips to Louisville



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



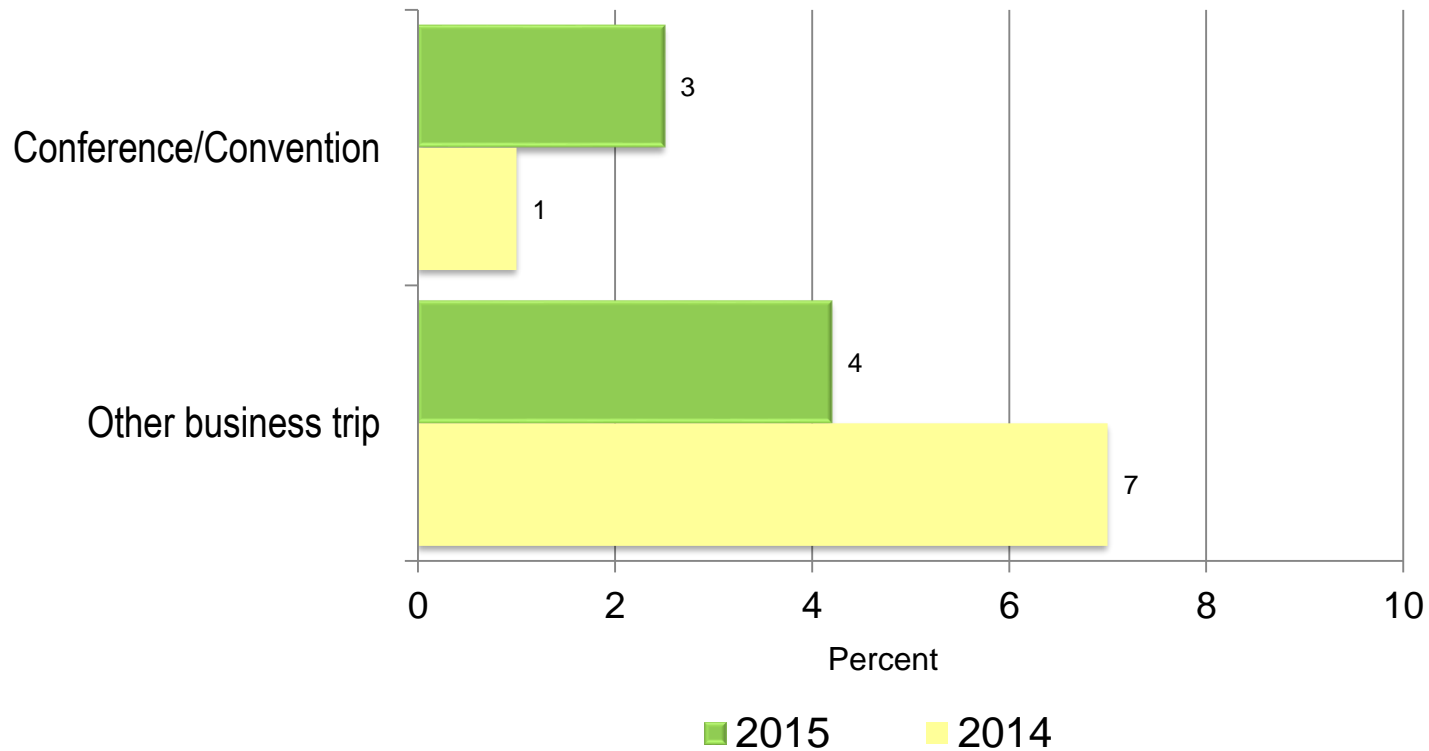
Base: Total Day Person-Trips



Main Purpose of Day Business Trip to Louisville – 2015 vs. 2014



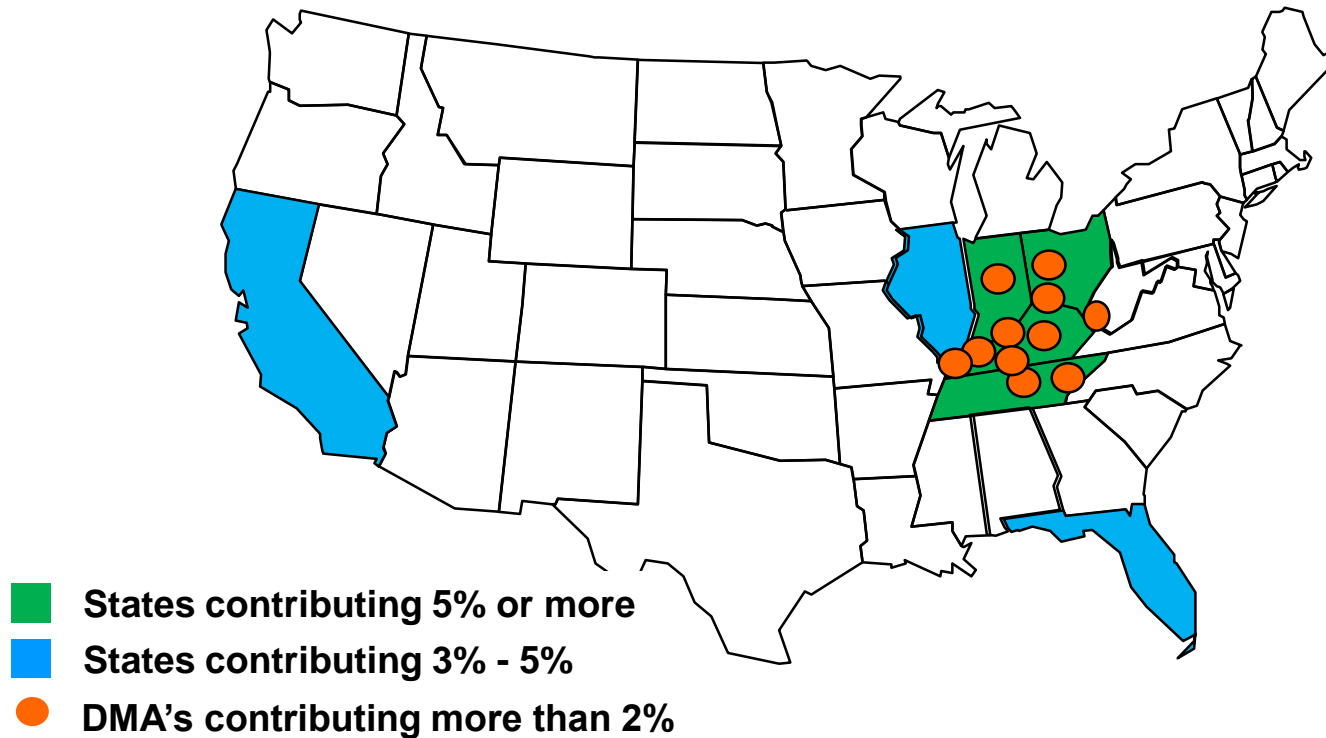
Base: Total Day Person-Trips to Louisville



Sources of Business



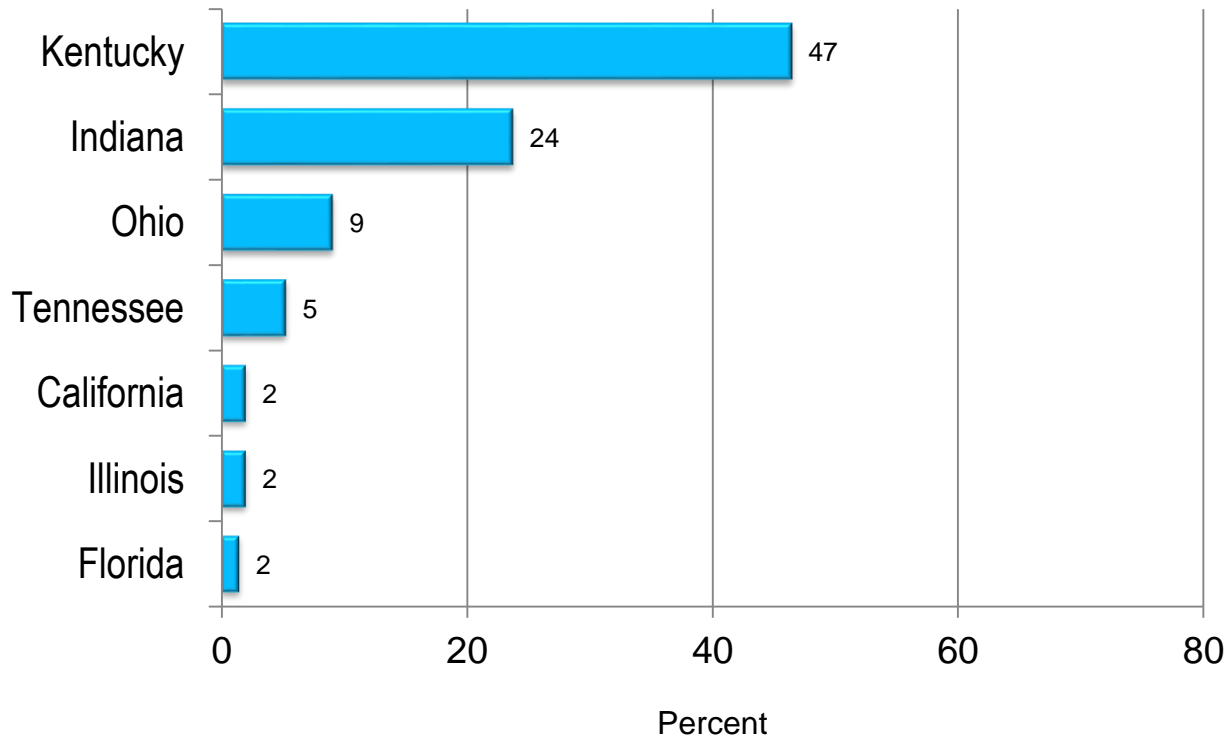
Base: Total Day Person-Trips to Louisville



State Origin Of Trip



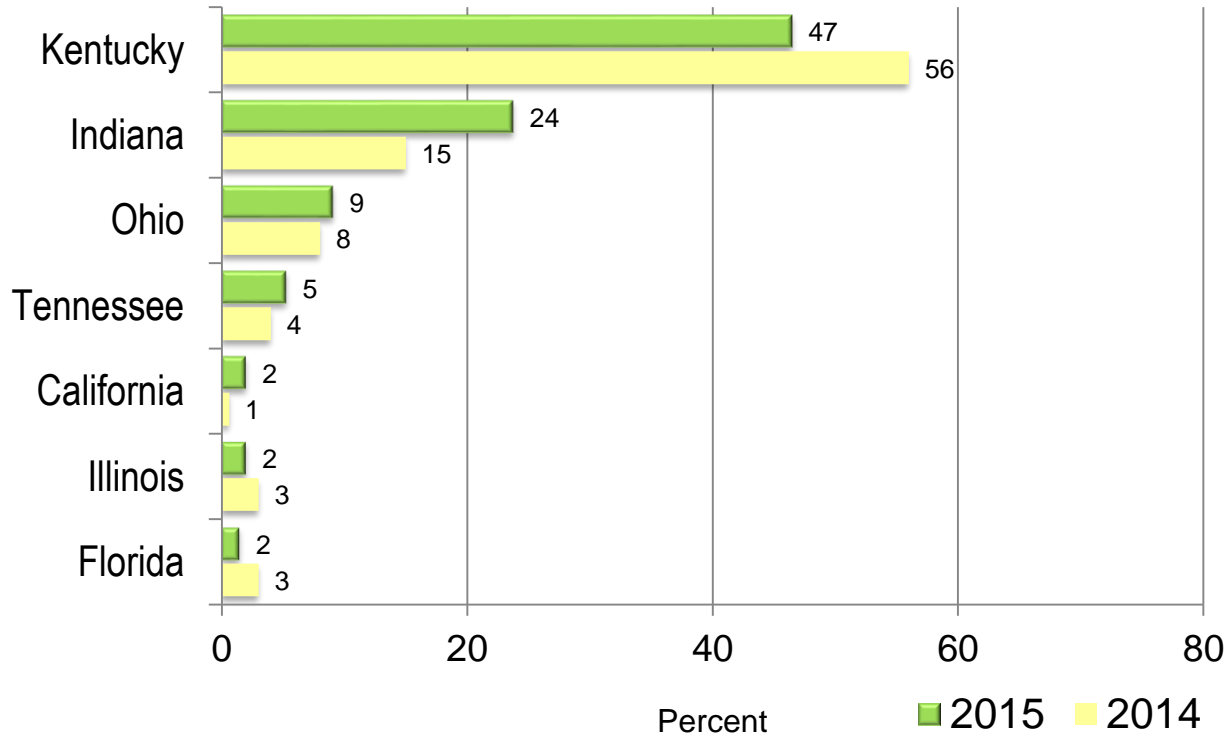
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State Origin Of Trip - 2015 vs. 2014



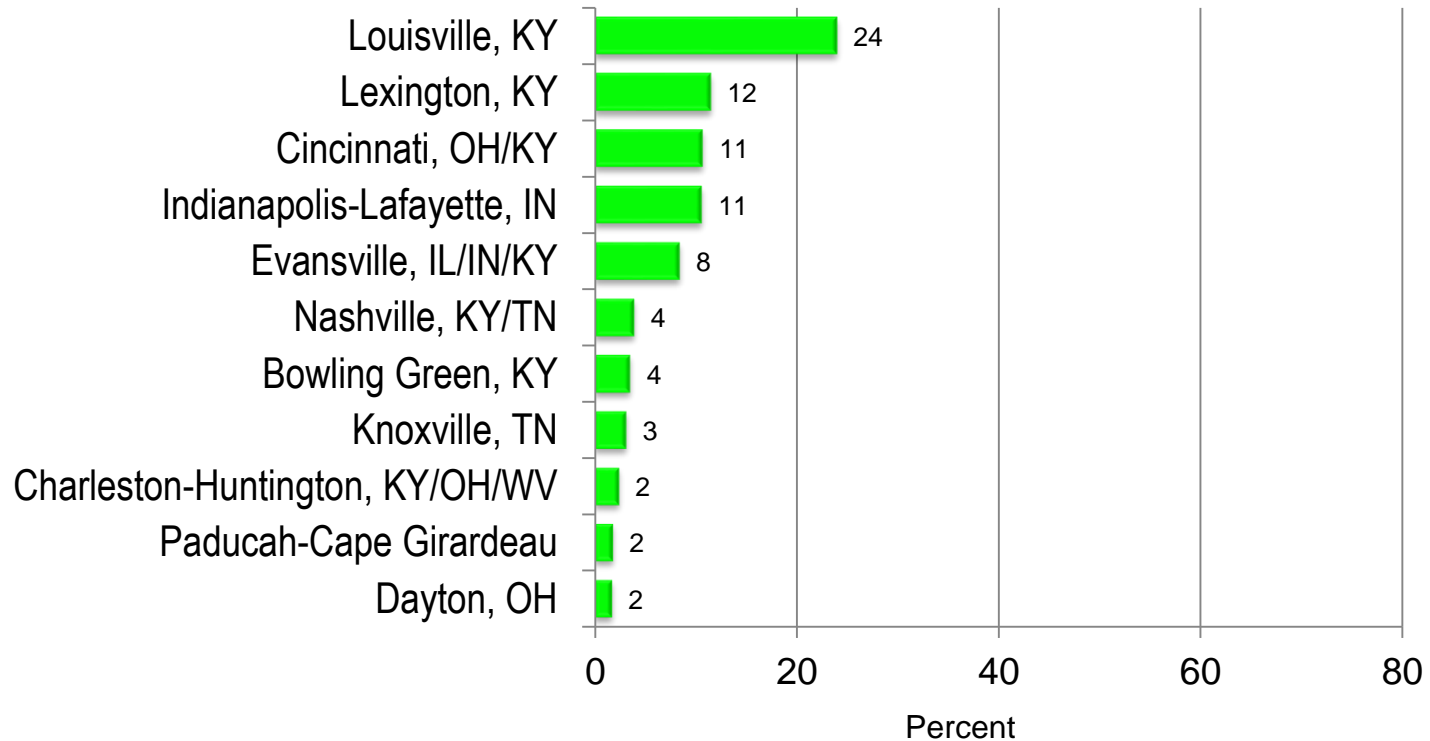
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DMA Origin Of Trip



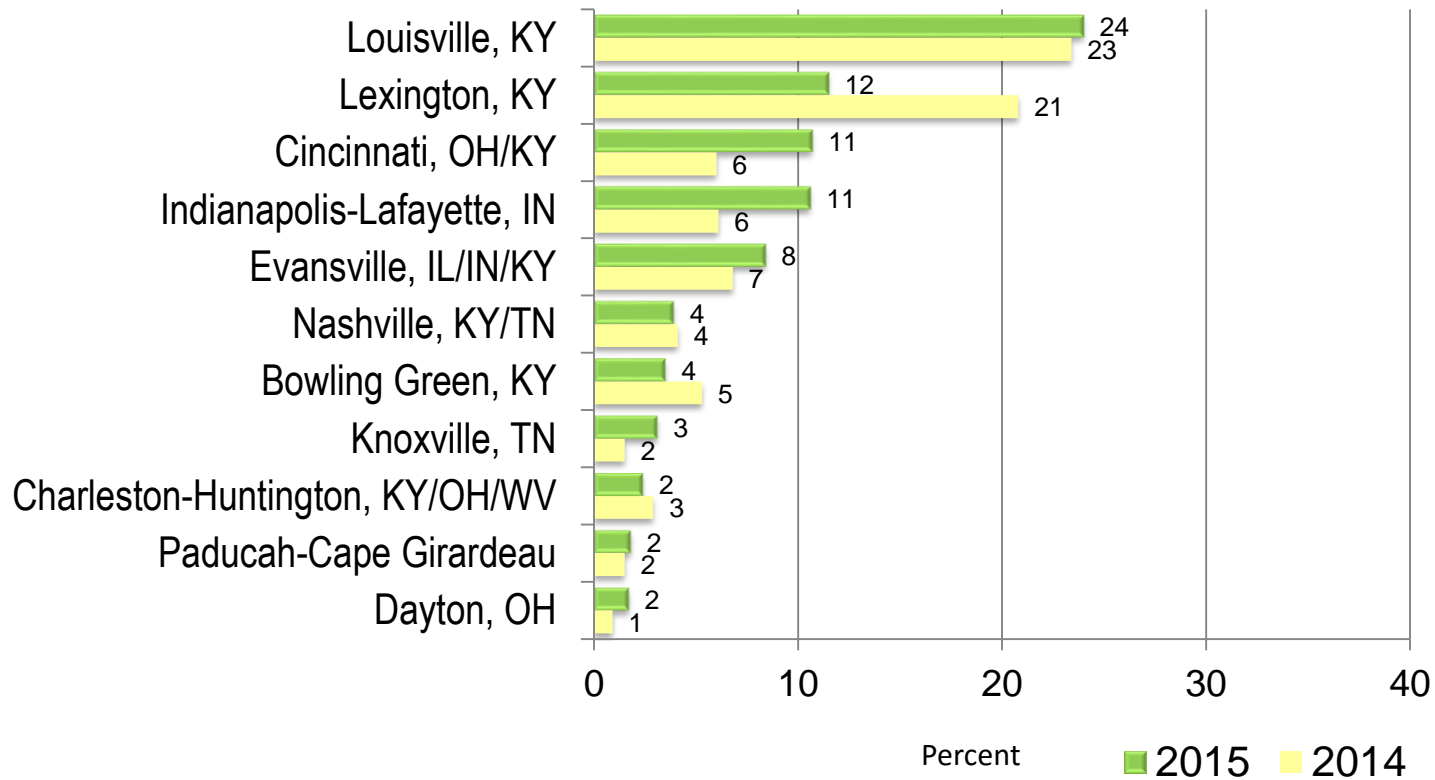
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DMA Origin Of Trip – 2015 vs. 2014



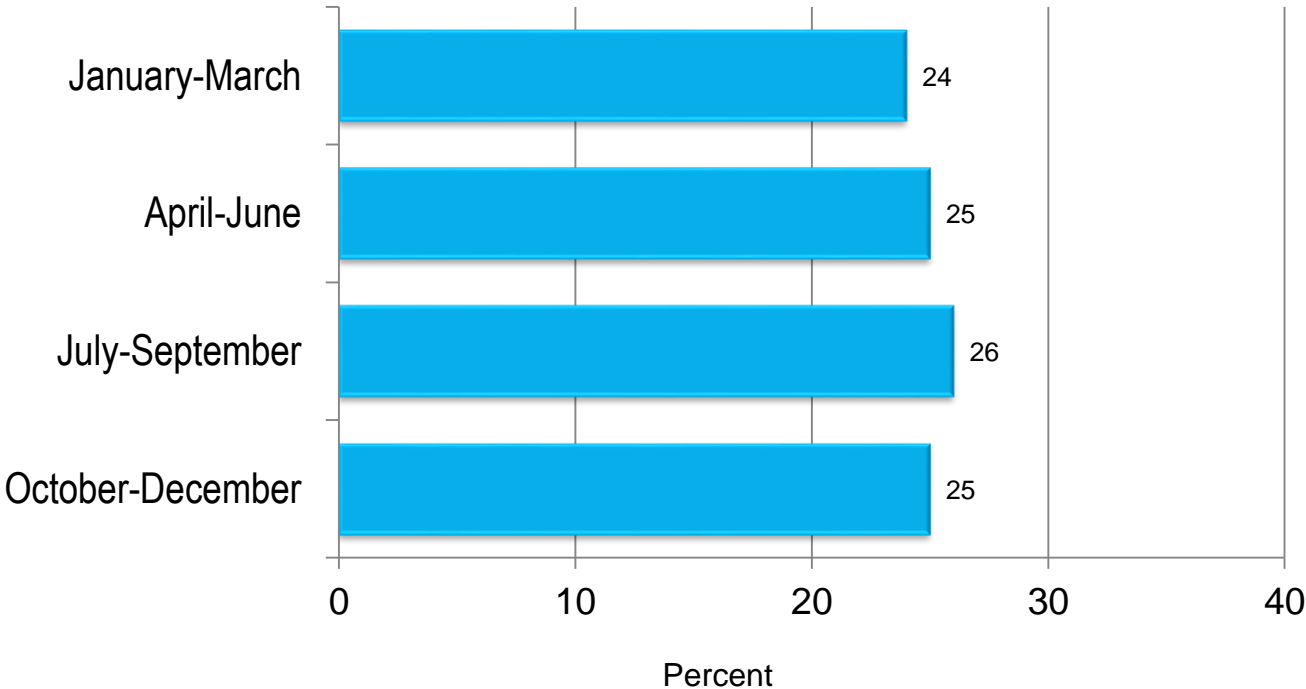
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Season of Trip



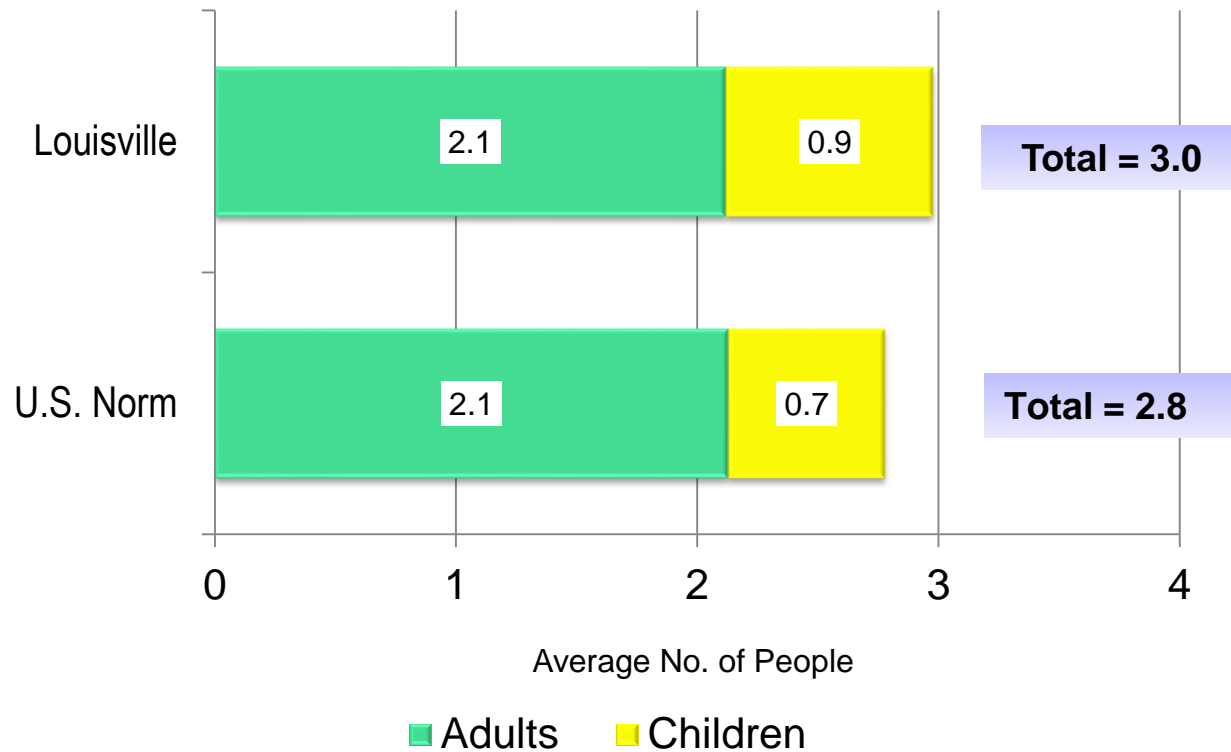
Base: Total Day Person-Trips to Louisville



Size of Travel Party



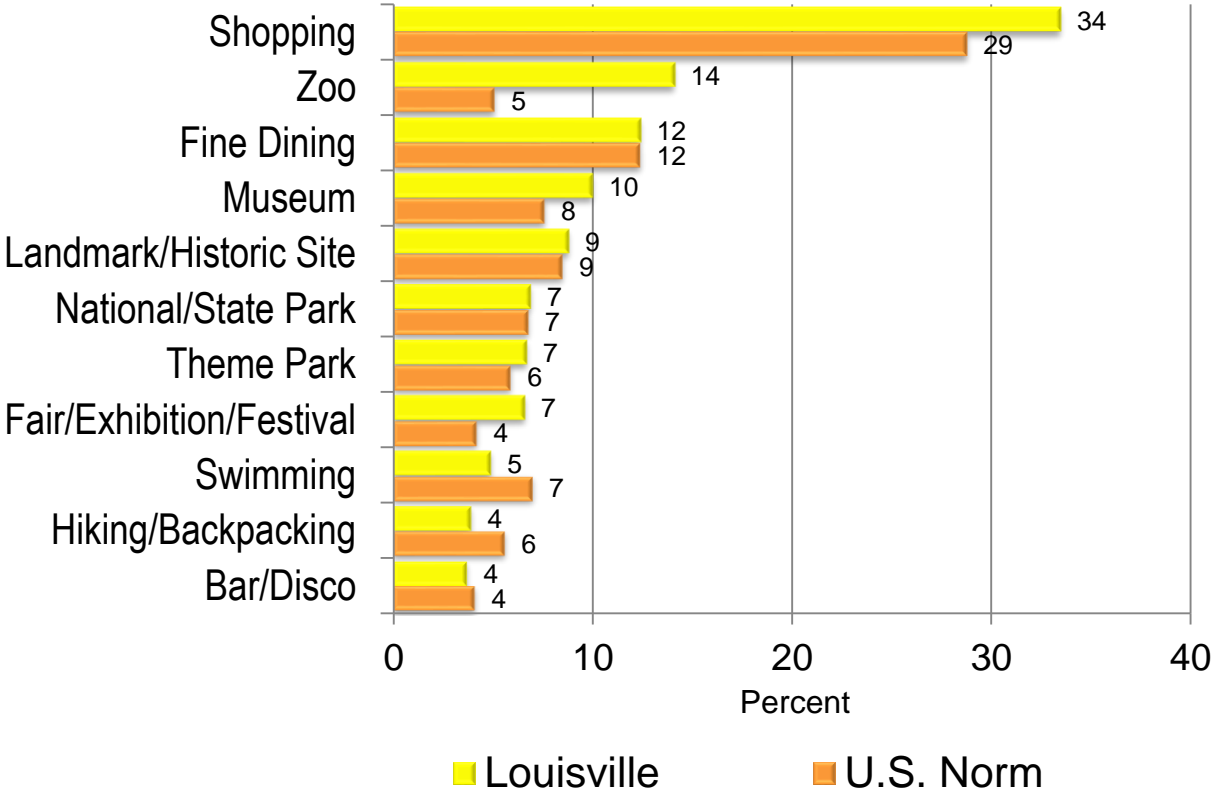
Base: Total Day Person-Trips



Activities and Experiences



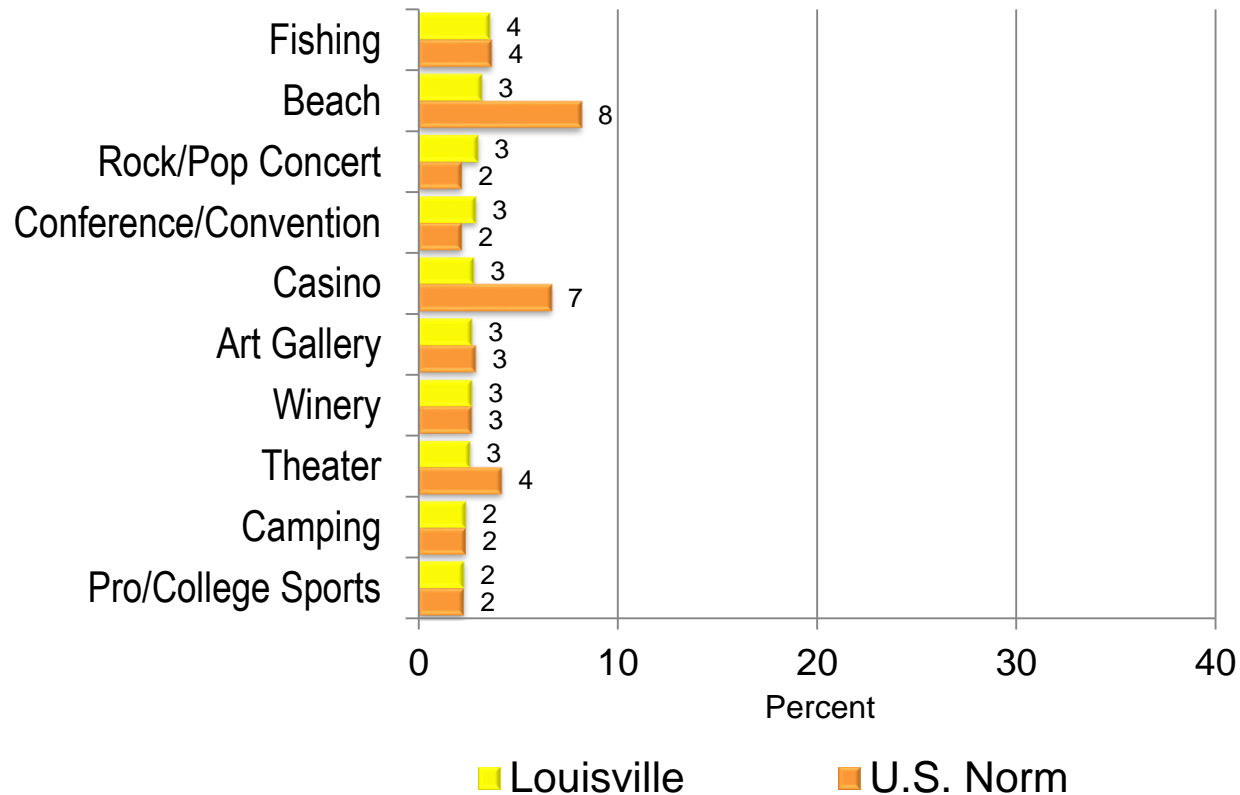
Base: Total Day Person-Trips



Activities and Experiences – (Cont'd)



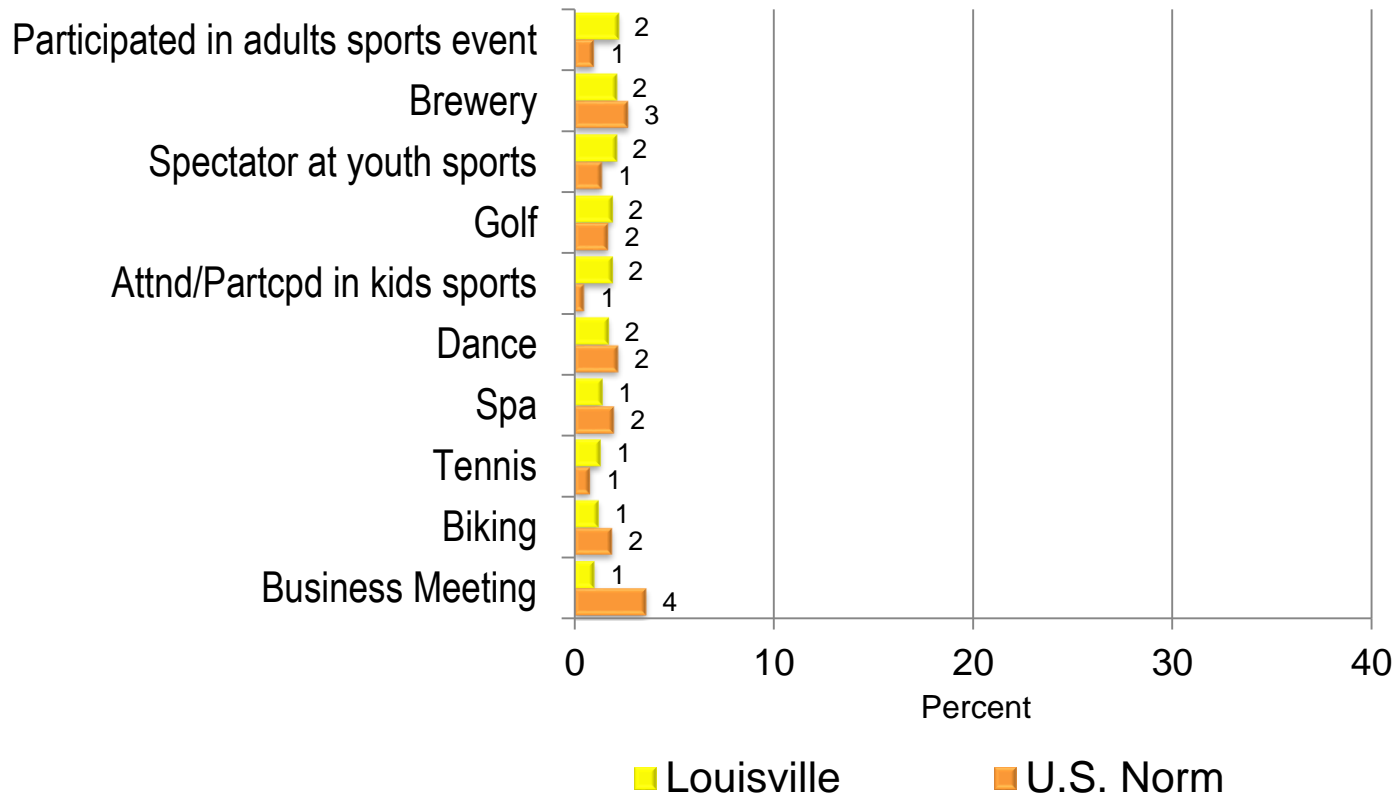
Base: Total Day Person-Trips



Activities and Experiences – (Cont'd)



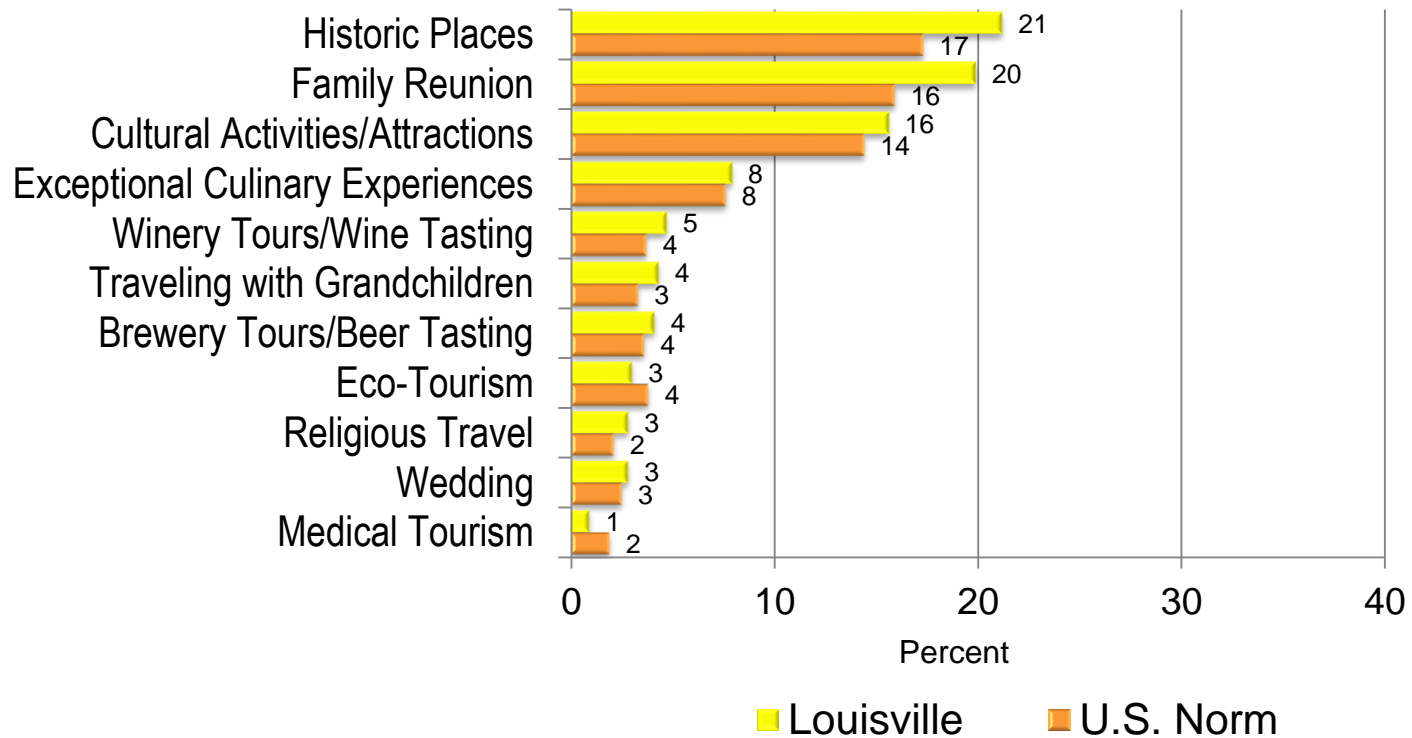
Base: Total Day Person-Trips



Activities of Special Interest



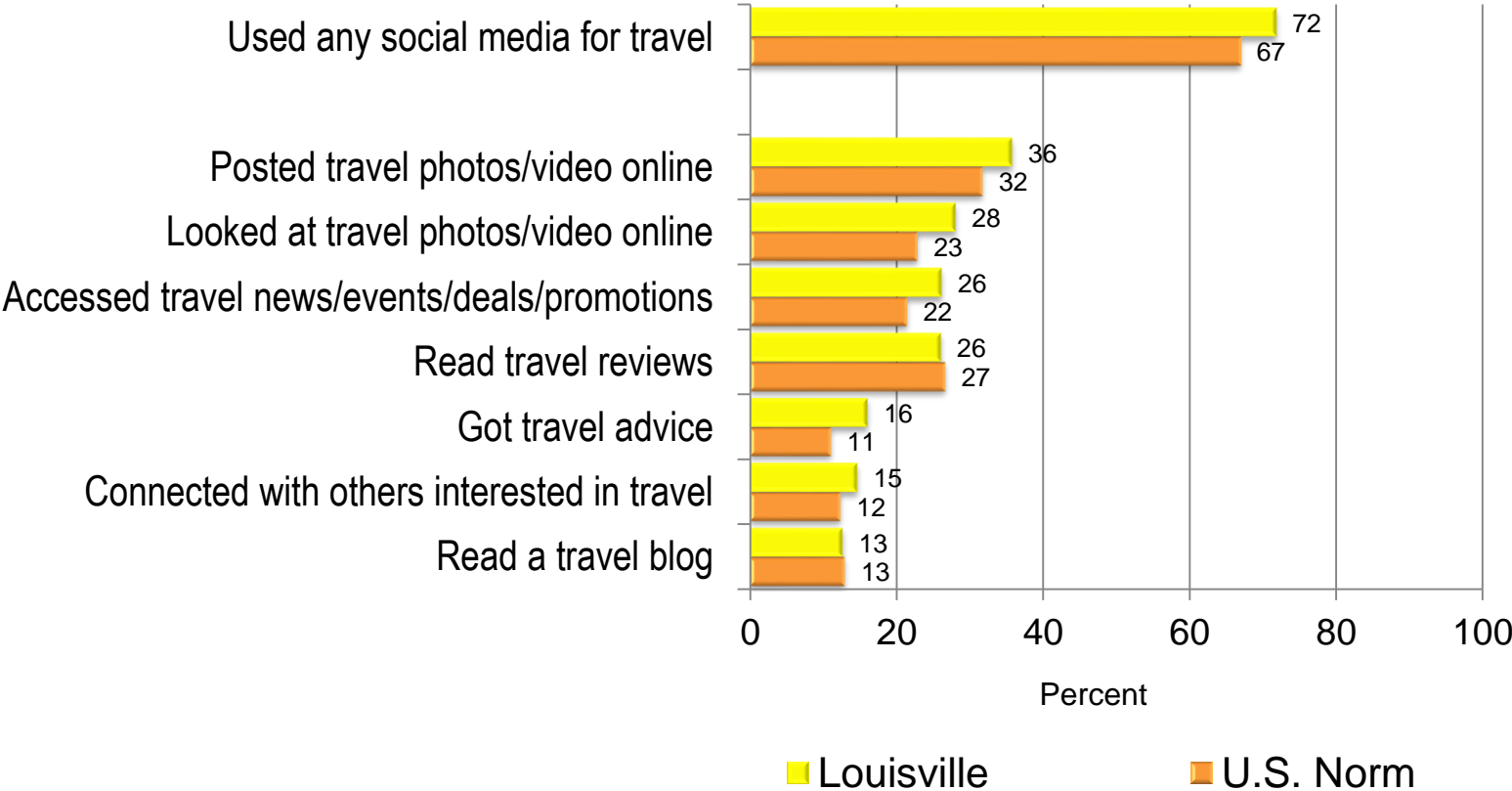
Base: Total Day Person-Trips



Online Social Media Use by Travelers



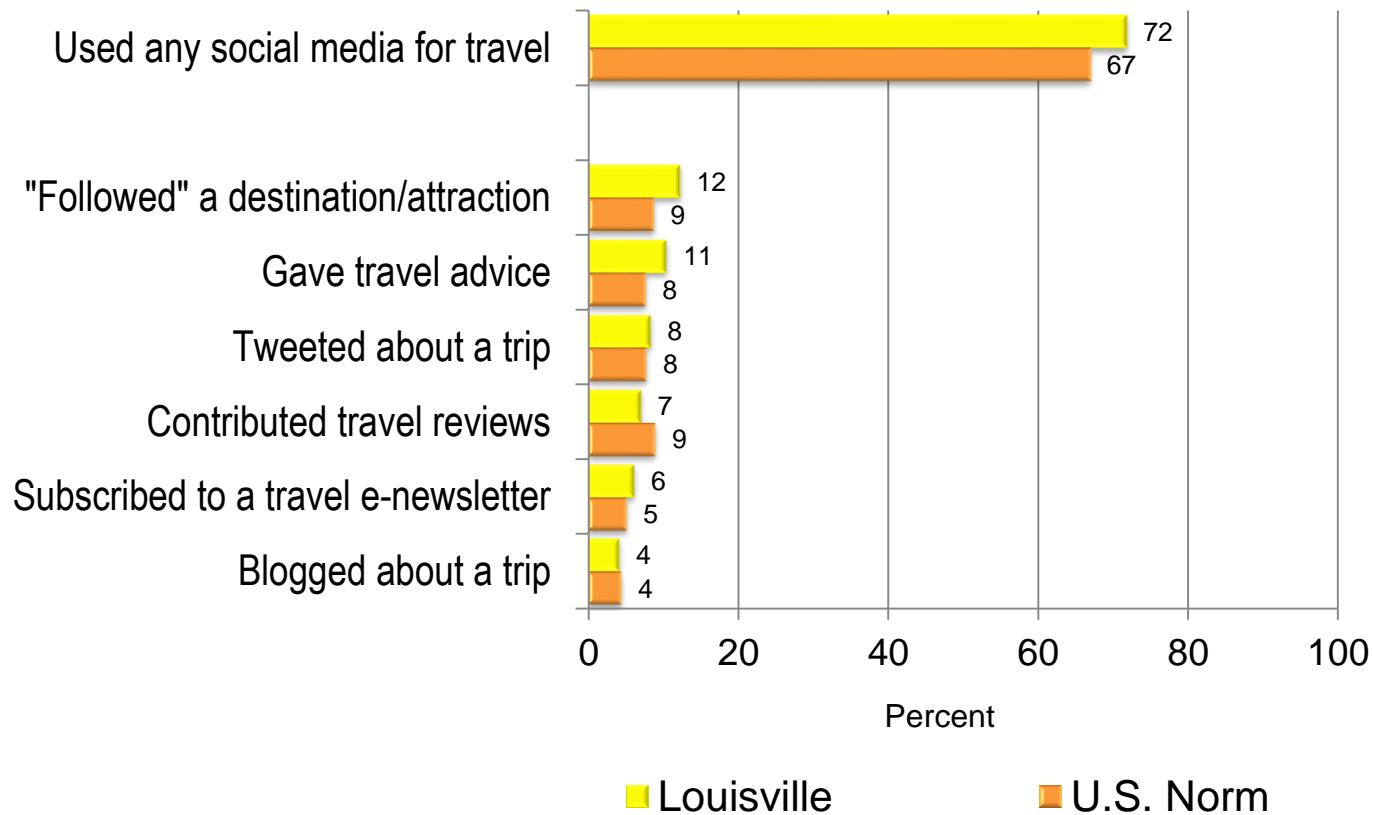
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Online Social Media Use by Travelers – (Cont'd)



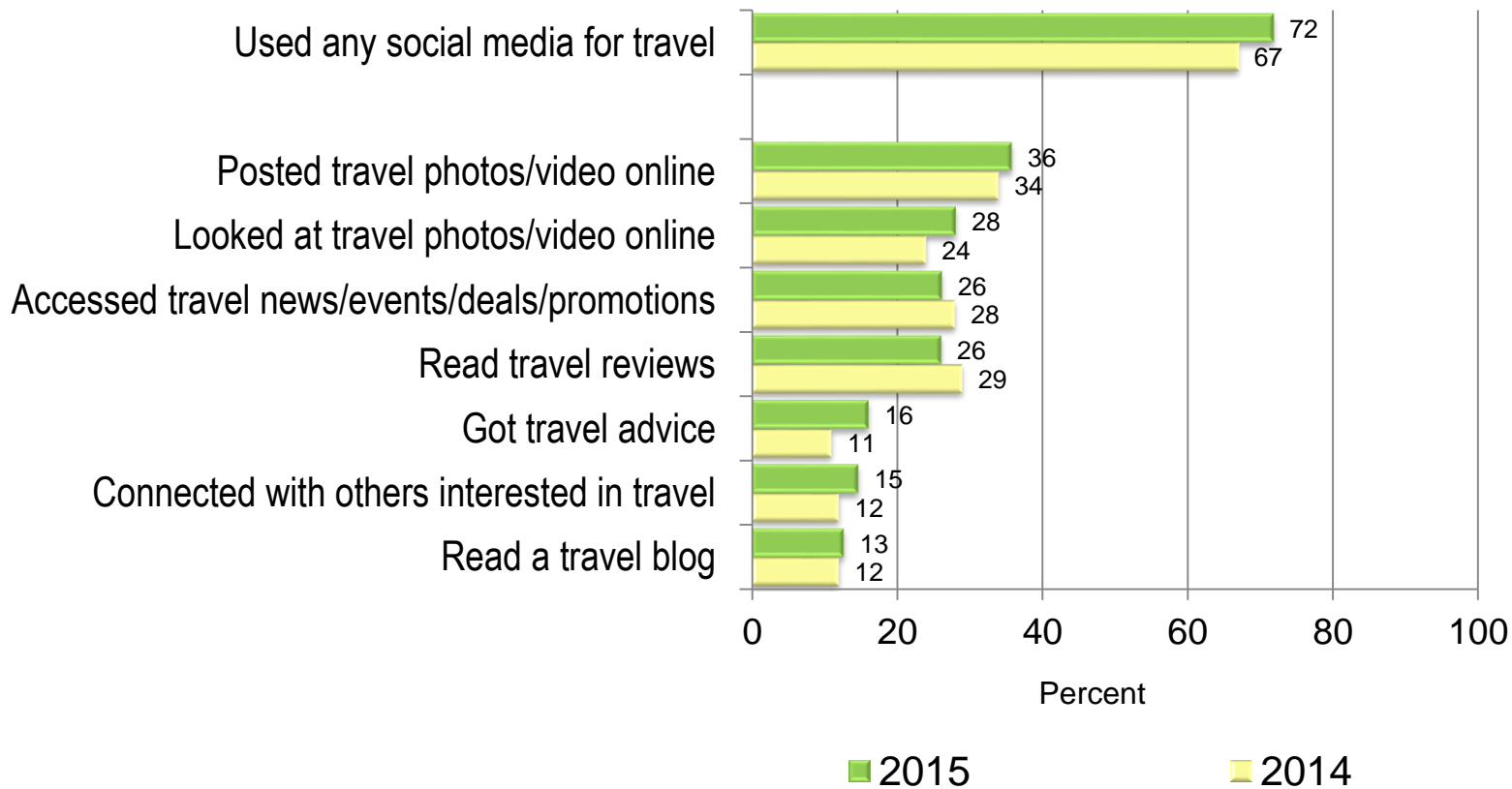
Base: Total Day Person-Trips



Use of Social Media for Travel to Louisville – 2015 vs. 2014



Base: Total Day Person-Trips to Louisville

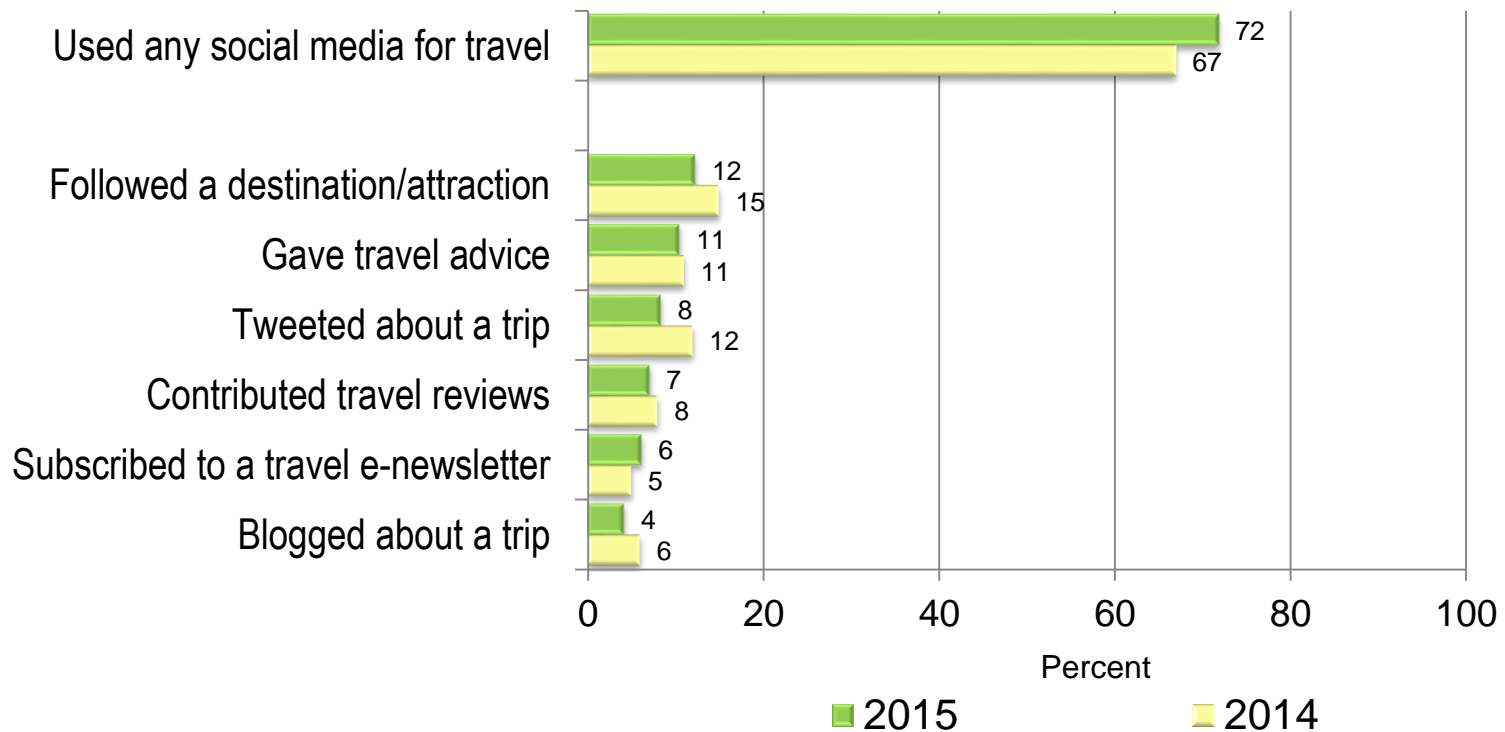


Use of Social Media for Travel to Louisville

2015 vs. 2014 – (Cont'd)



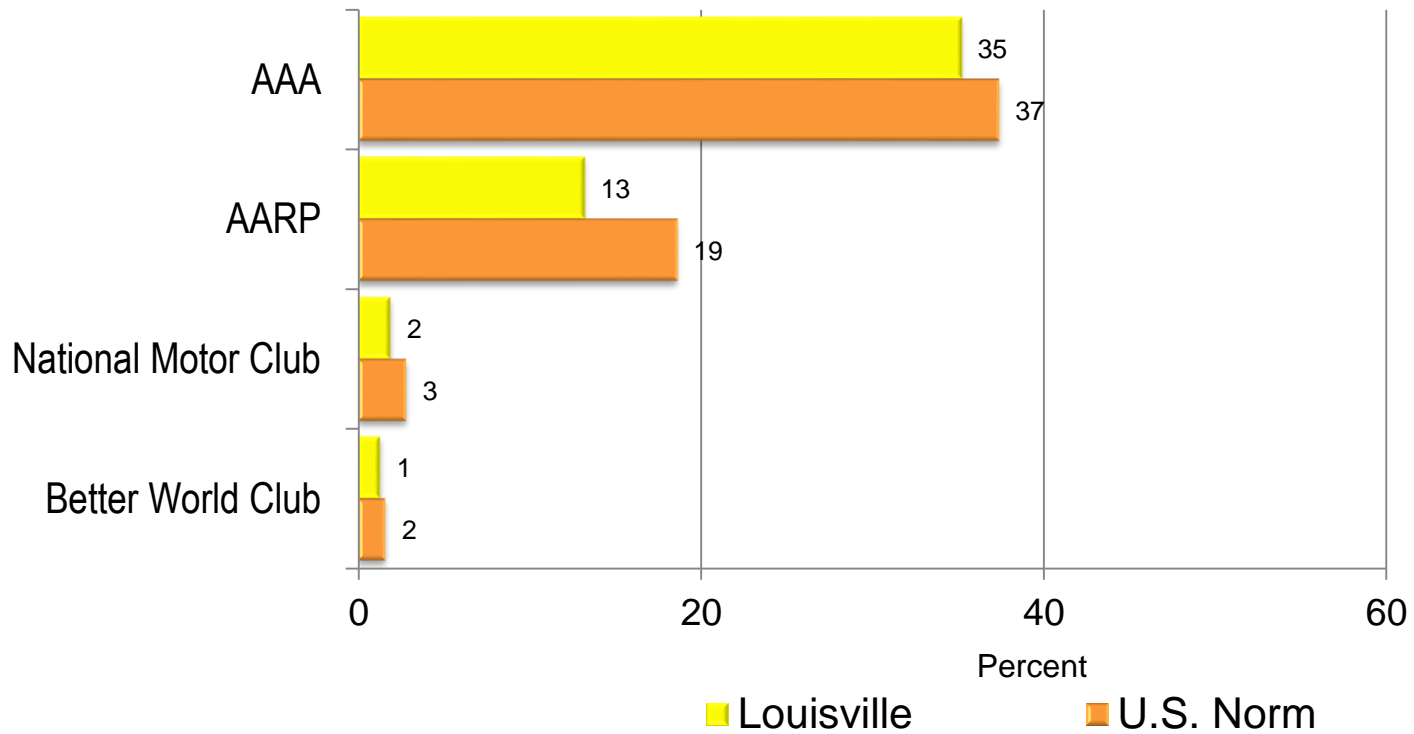
Base: Total Day Person-Trips to Louisville



Organization Membership



Base: Total Day Person-Trips



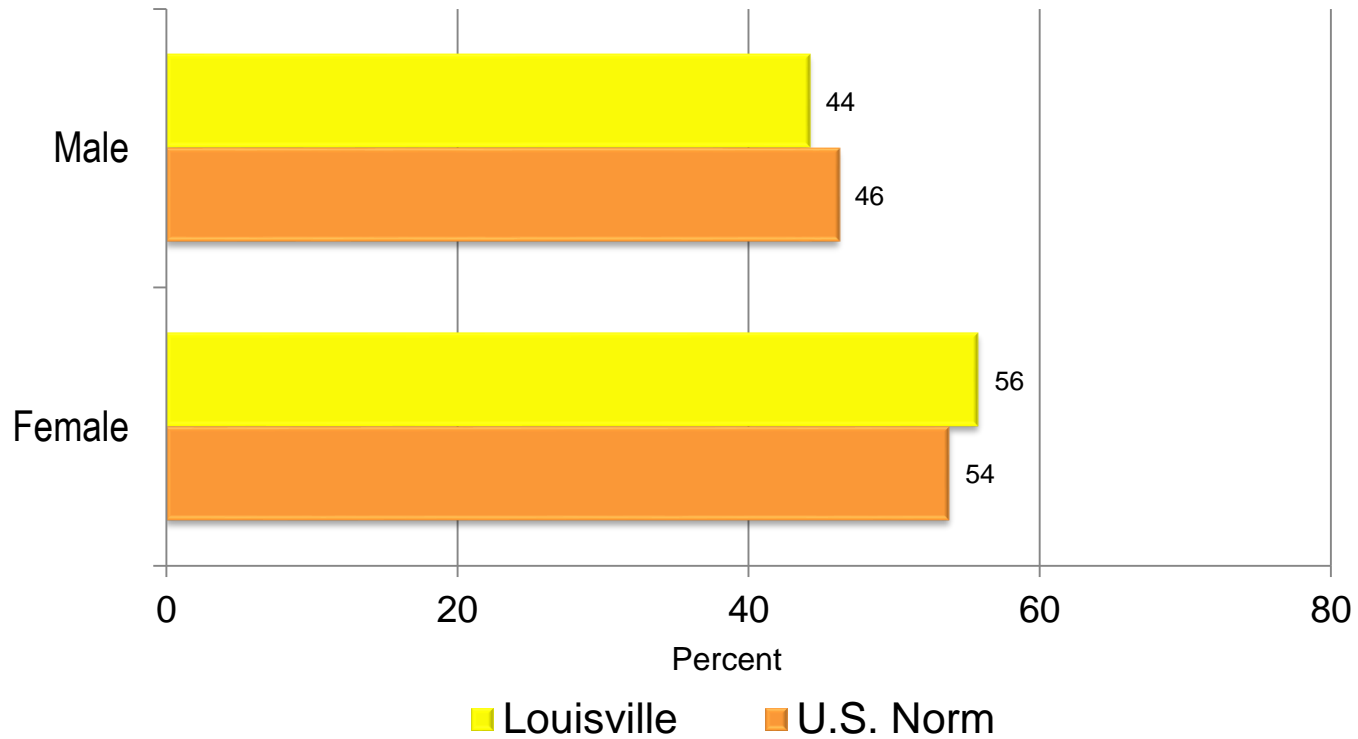


Demographic Profile of Day Visitors

Gender



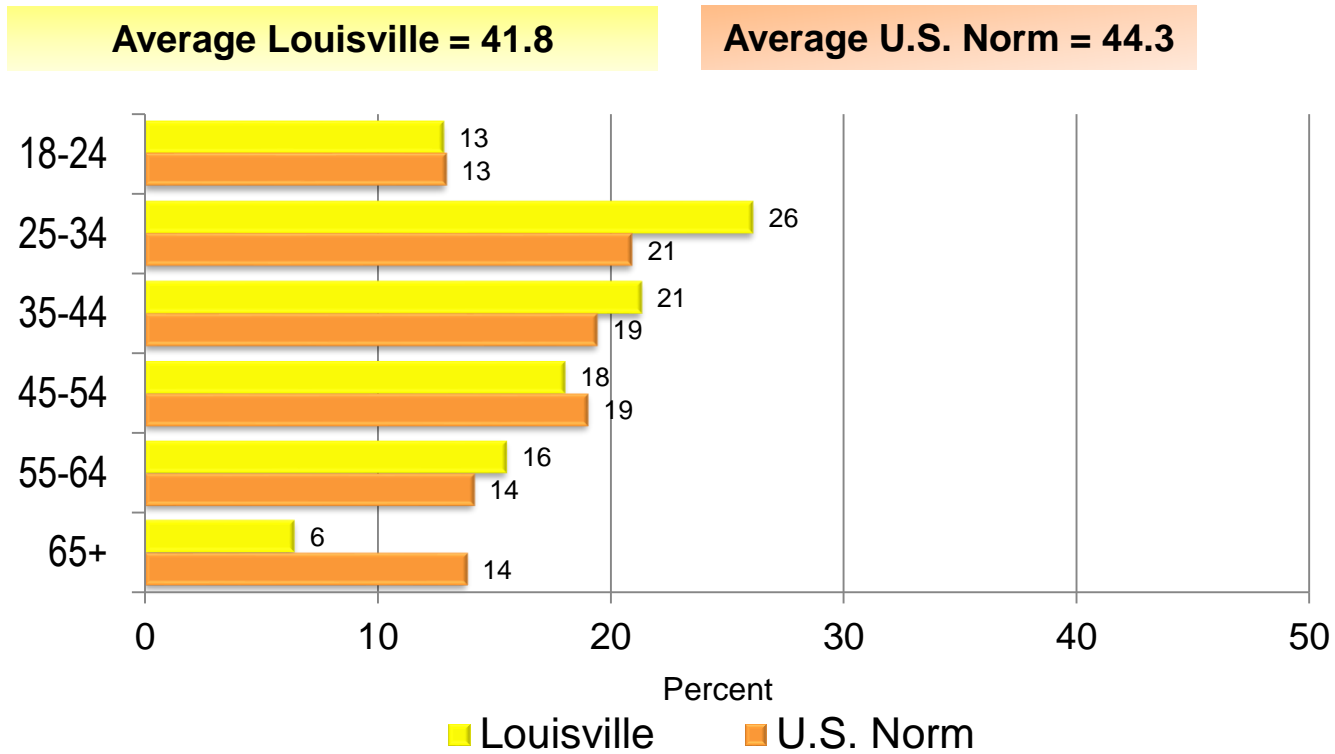
Base: Total Day Person-Trips



Age



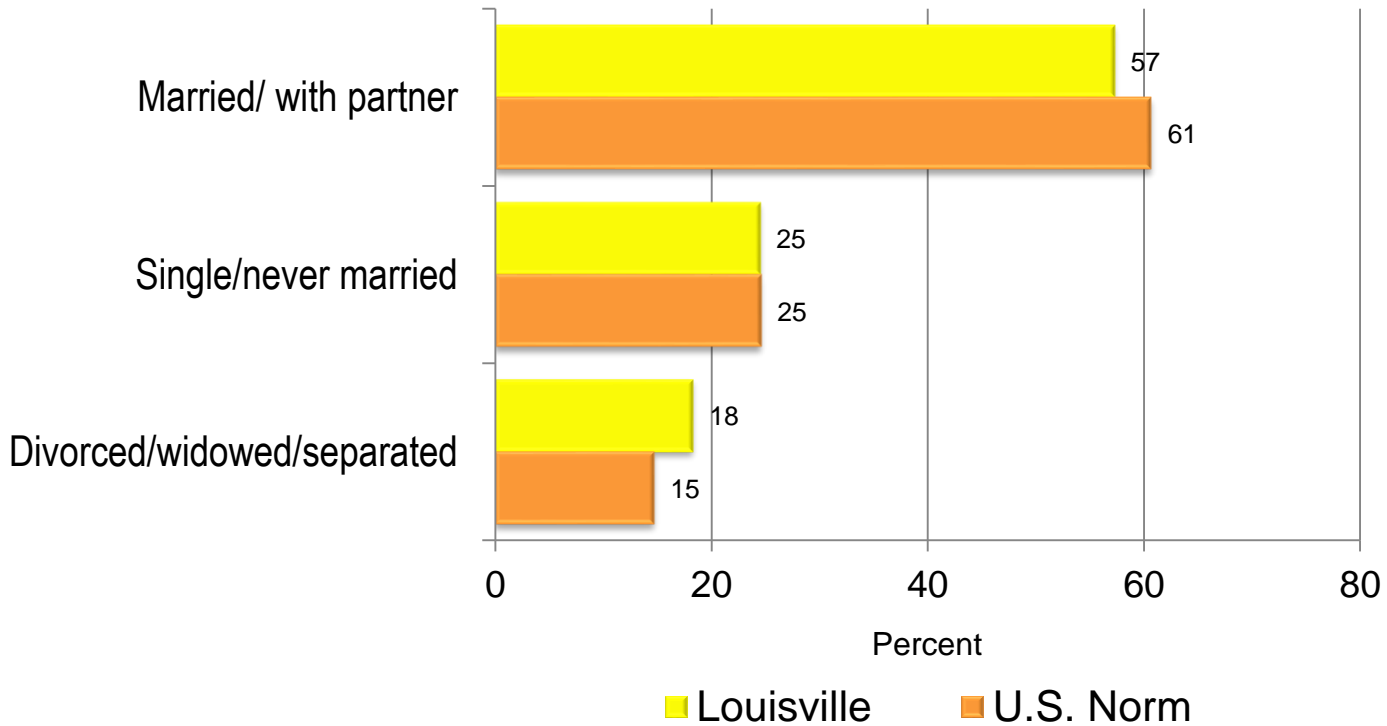
Base: Total Day Person-Trips



Marital Status



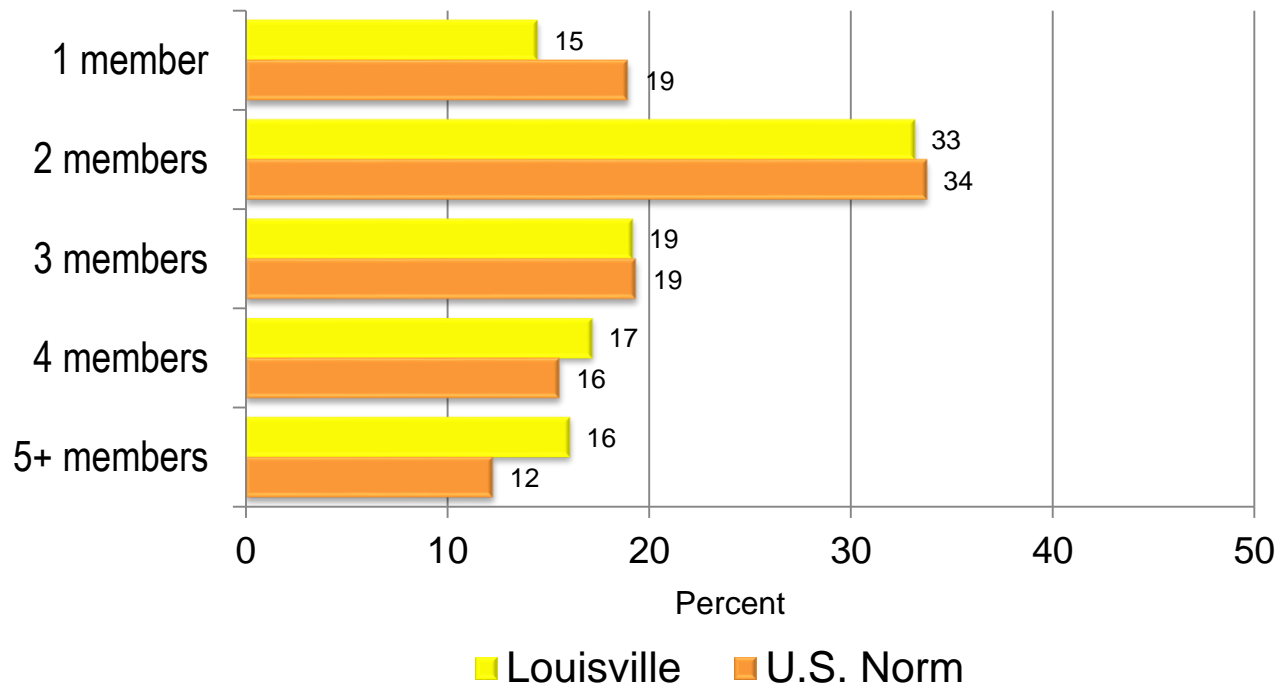
Base: Total Day Person-Trips



Household Size



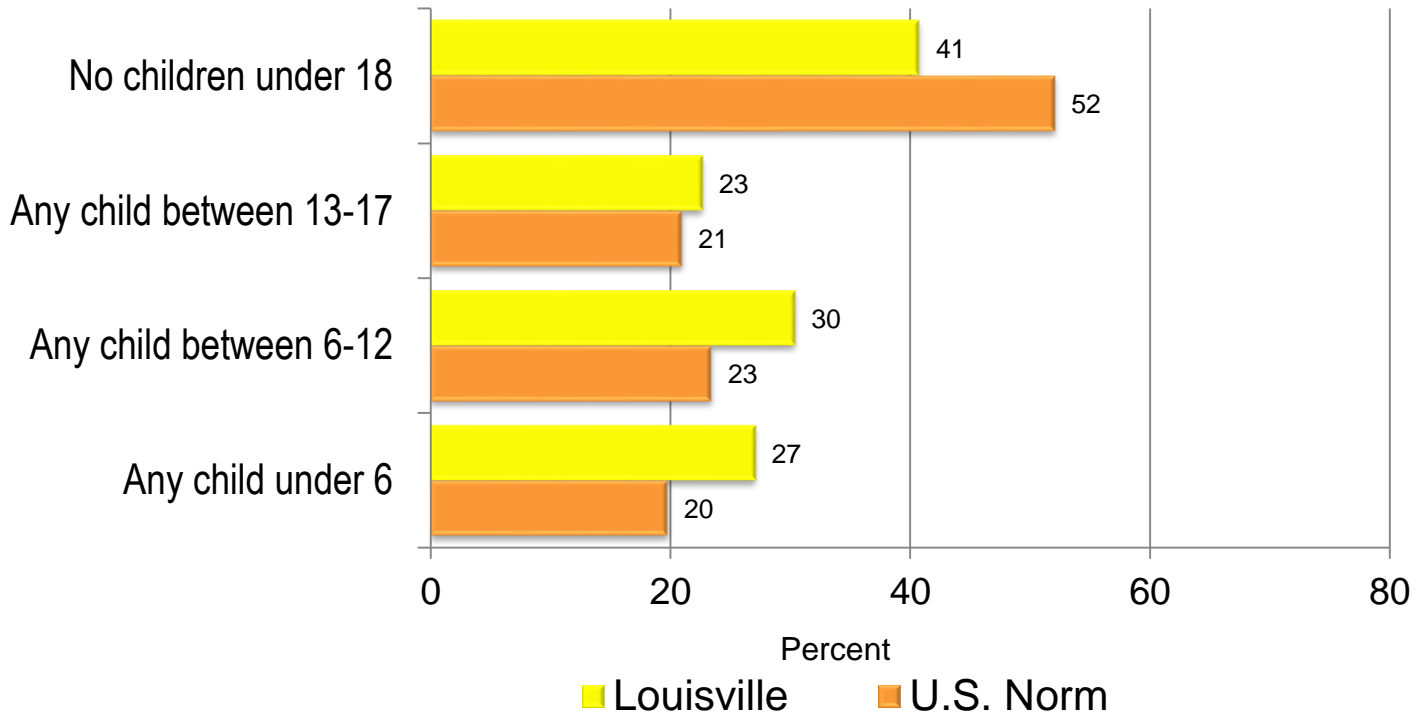
Base: Total Day Person-Trips



Children in Household



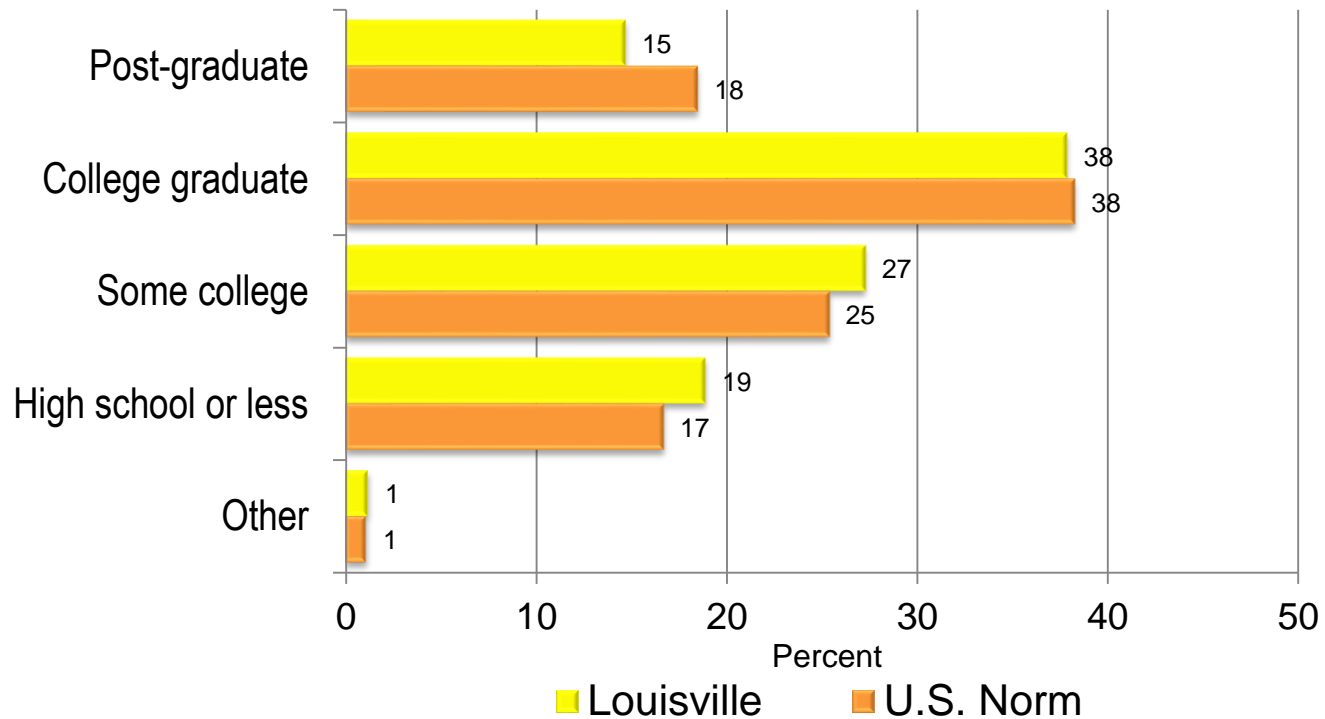
Base: Total Day Person-Trips



Education



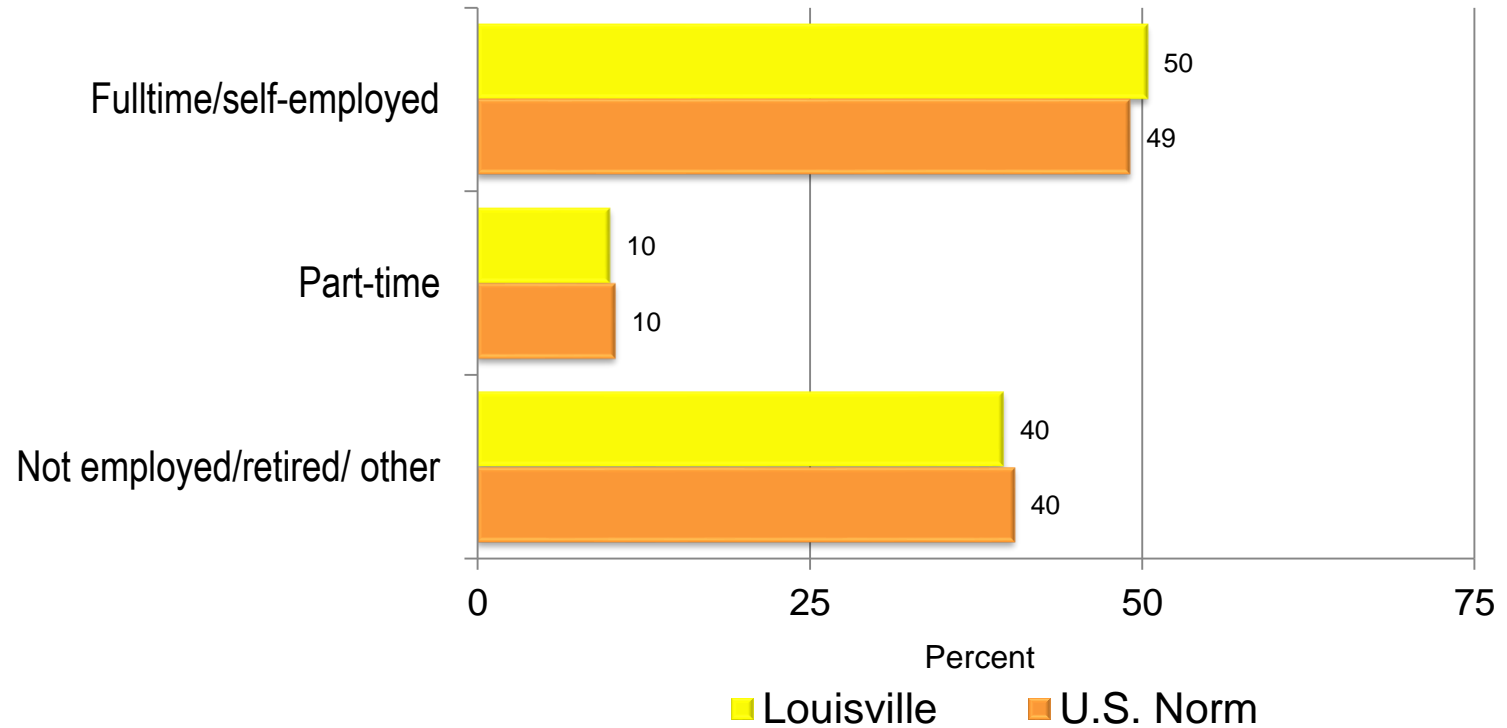
Base: Total Day Person-Trips



Employment



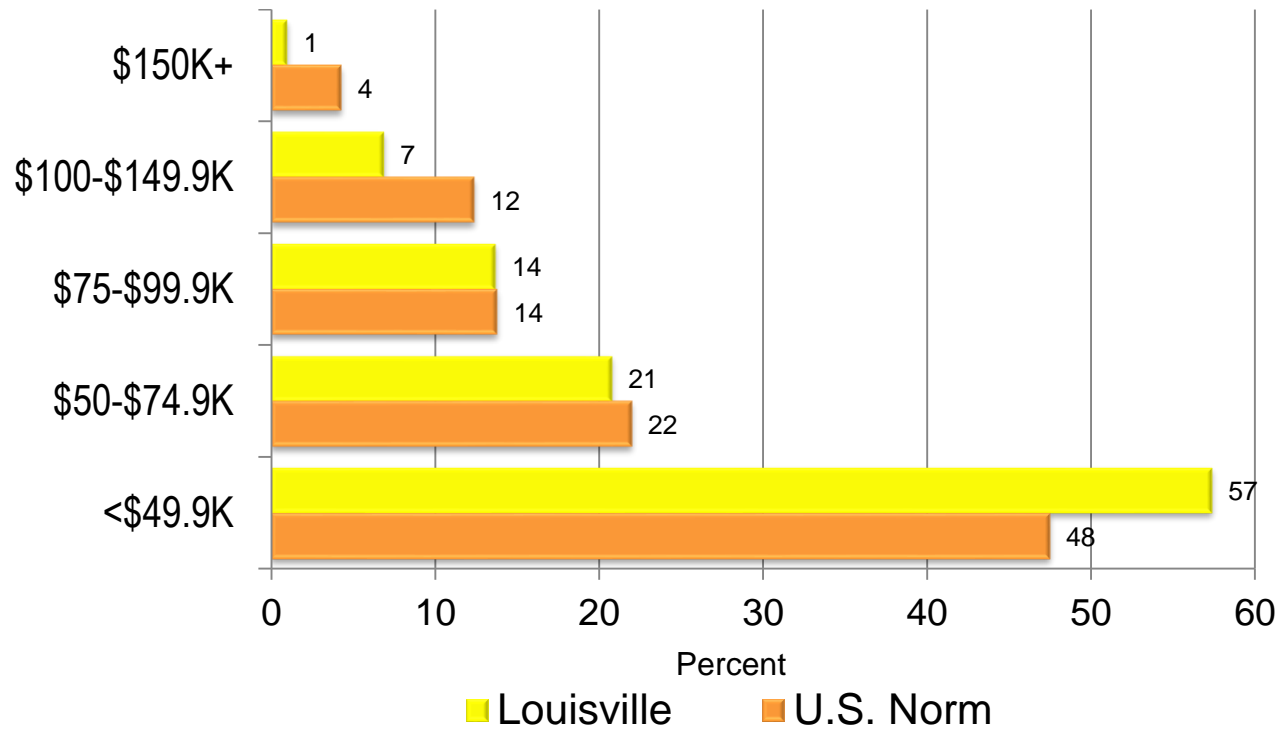
Base: Total Day Person-Trips



Household Income



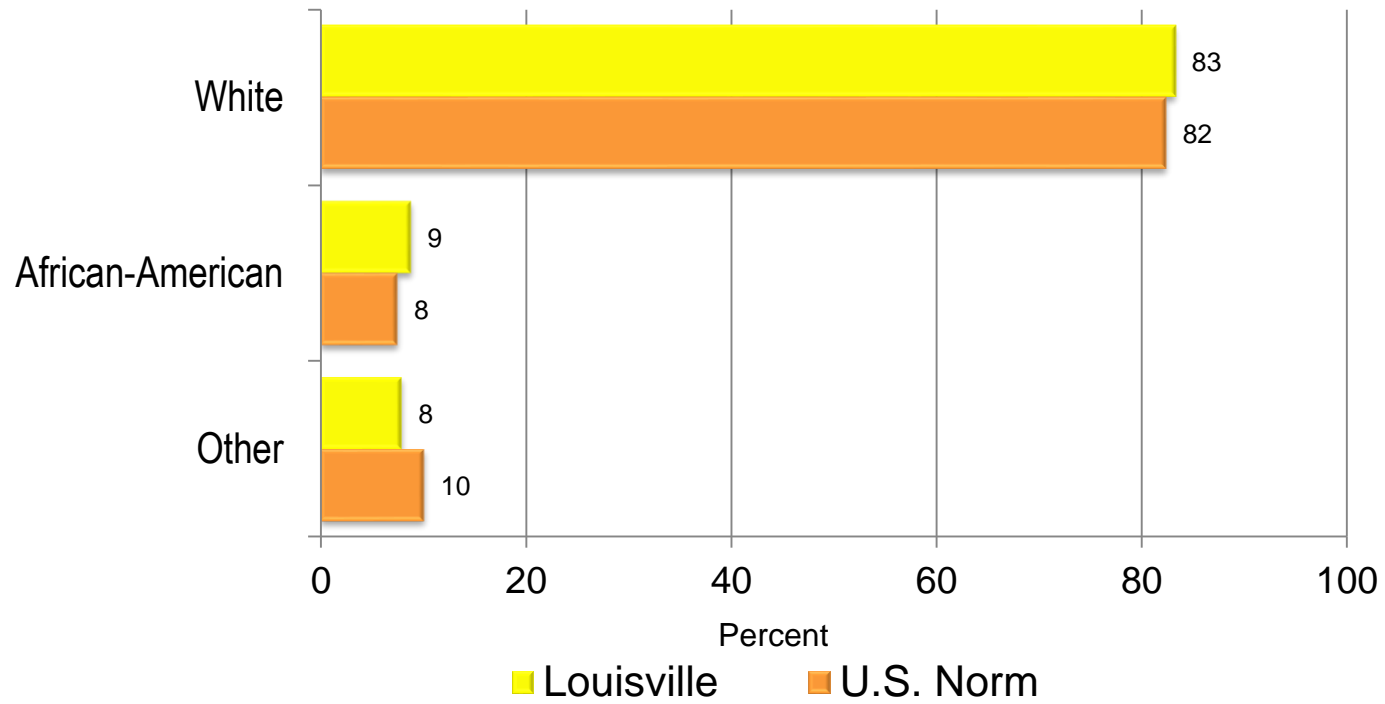
Base: Total Day Person-Trips



Race



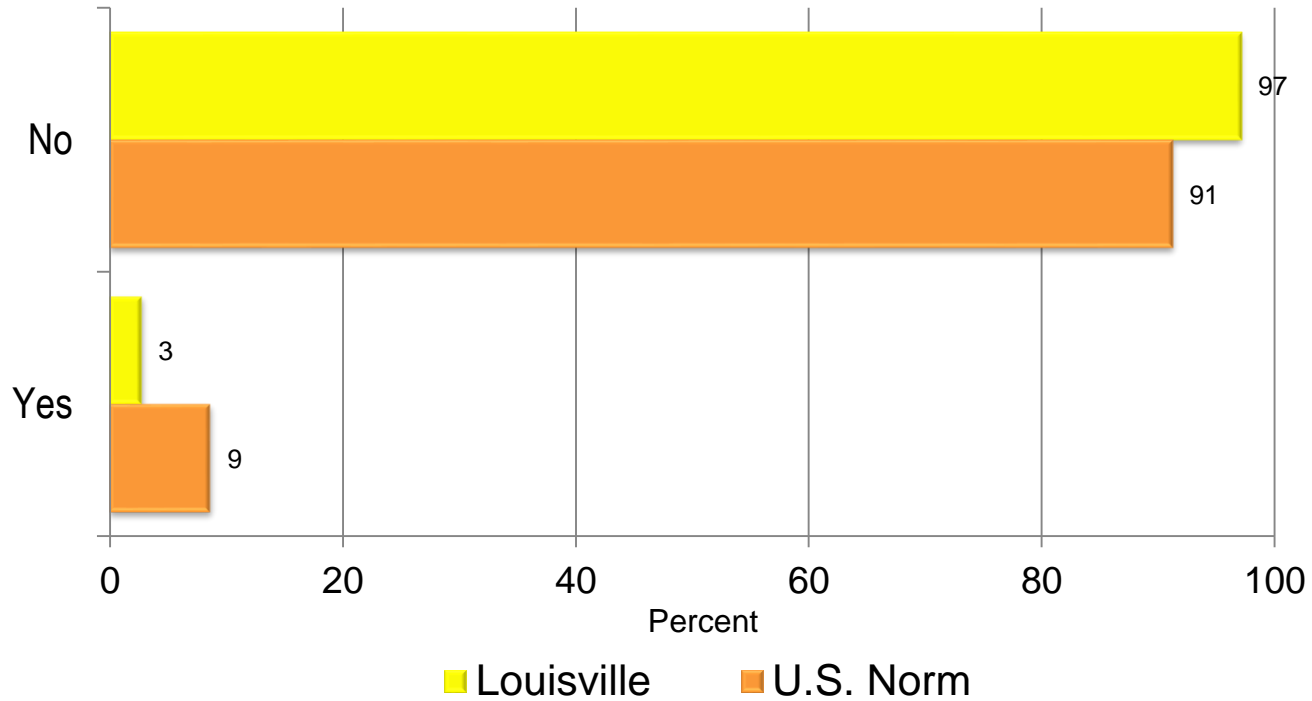
Base: Total Day Person-Trips



Hispanic Background



Base: Total Day Person-Trips





Appendix A: Key Terms Defined

Key Terms Defined



- ◉ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ◉ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- ◉ A **Person-Trip** is one trip taken by one visitor.
 - ◉ *Person-trips are the key unit of measure for this report.*

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - *Visiting friends/relatives*
 - *Touring through a region to experience its scenic beauty, history and culture*
 - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - *Special event, such as a fair, festival, or sports event*
 - *City trip*
 - *Cruise*
 - *Casino*
 - *Theme park*
 - *Resort (ocean beach, inland or mountain resort)*
 - *Skiing/snowboarding*
 - *Golf*
- **Business Trips:**
 - *Conference/convention*
 - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

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