



Greater Louisville
Convention & Visitors Bureau
Louisville Visitor Profile
Final Report of Findings
January 2016

Research Overview

This report presents the findings of a comprehensive visitor profile development conducted by Destination Analysts, Inc. on behalf of the Greater Louisville Convention & Visitors Bureau. The data presented here comes from an intercept survey of Louisville visitors at locations throughout the city, as well as from a self-administered survey distributed to guests at Louisville hotels.

This report presents the top-line survey data collected from these surveys during the 2015 calendar year. Note that data presented in this report has been weighted based on the destination's overall visitor mix (provided by the GLCVB). The weighting regime used in this study is based on the respondents place of stay. This was done to reflect an accurate segmentation of the overall visitor volume to Louisville.



Destination Analysts team member surveying at the Evan Williams Bourbon Experience.

Research Objectives

The overarching goal of this survey-based research is to create an in-depth profile of the Louisville visitor, including developing the following marketing intelligence:

- Detailed trip characteristics (i.e. tripographic information like the reason for visiting Louisville, length of stay, place of stay, etc.)
- Activities & attractions visited in Louisville
- Evaluation of Louisville brand attributes
- Detailed Louisville visitor spending estimates
- Travel planning resources used by Louisville visitors
- Visitor expectations and satisfaction
- Visitor psychographic and demographic profiling

In addition to developing a comprehensive, multi-segment Louisville visitor profile, this research is being used to generate insights into visitors who patronize various Louisville attractions. Data from this research is also going to be used as inputs to estimate the economic impact of tourism to the Louisville area.

Methodology

The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with the Greater Louisville CVB, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to Louisville collected at locations around the city, and (2) a self-administered survey of Louisville hotel guests distributed at their hotel.

The research model used here was developed to overcome weaknesses in each technique that might emerge if conducted alone. First, an intercept methodology will severely under-sample overnight visitors since the market is comprised of a high volume of visitors who are in the area solely for a day trip. The project needed to find a way to effectively sample this important visitor segment, as overnight visitors inject significantly more spending into the local economy. Second, a hotel guest survey, while accessing overnight guests, does not collect data from visitors who do not stay overnight in paid accommodations (e.g., regional residents on leisure day-trips, persons staying in the homes of friends and relatives and those staying in paid lodging outside Louisville). These segments form the largest share of the city's visitors and, as the goal of the research was to develop a profile of all visitors to the city, integrating both survey techniques was imperative.

Thus, the methodology developed for this project uses both techniques—a citywide intercept survey and a hotel guest survey--harnessing the inherent power of both. By then developing appropriate weighting techniques, the final statistics emerging from the project accurately reflect the overall population of Louisville visitors.

Visitor Intercept Survey Overview

Destination Analysts' survey collection team worked at locations around the city to randomly select and interview visitors. In order to develop a broadly representative sample, surveys were collected during the morning and afternoon on both weekdays and weekends. A total of 2,327 fully-completed visitor intercept surveys were gathered, compiled and analyzed. The questionnaire was administered to persons residing outside Louisville at the following locations:



Destination Analysts team member interviews visitor aboard the Belle of Louisville.

- Belle of Louisville/Spirit of Jefferson
- Churchill Downs
- Evan Williams Bourbon Experience
- Forecastle
- Fourth Street Live
- Galt House
- Kentucky Derby Museum
- Kentucky Derby Festival/Thunder Over Louisville
- Kentucky Kingdom
- Kentucky Science Center
- Louder Than Life Festival
- Louisville Marriott Downtown
- Louisville Slugger Museum
- Louisville Zoo
- Madness in the Streets Block Party
- Mega Caverns
- Muhammad Ali Center
- Visitor Information Center

Visitor Intercept Survey Overview (continued)

Through the 2015 calendar year, our team also intercepted visitors at the following events:

 Madness in the Streets Block Party

 Kentucky Derby Festival/Thunder Over Louisville

 Downs After Dark

 Forecastle

 Louder Than Life Festival



Destination Analysts team member interviews visitor at Madness in the Streets Block Party.



Destination Analysts team member interviews visitor at Downs After Dark.



Destination Analysts team member interviews visitor at Forecastle.



Destination Analysts team member interviews visitor at the Louder Than Life Festival.

Hotel Guest Survey Overview

The other portion of this research was conducted exclusively of hotel guests. The Louisville Hotel Guest Survey is a self-administered survey conducted at 11 participating Louisville hotels. Destination Analysts worked closely with the Greater Louisville CVB to develop a 30-question survey questionnaire (virtually identical to the intercept survey), which was then laid out as a one-page, tri-fold printed piece. The printed piece was designed with a business reply panel so that, upon completing the survey, hotel guests could simply fold, seal, and drop it in the mail. A sweepstakes to win one of several cash prizes was offered as an incentive for hotel guests to complete the survey.

The survey was distributed to all hotel guests at participating properties over a two-week period during each quarter of the year.

Throughout each distribution period, guests were given the survey on the day of their departure either in their room with their express checkout receipt or by the front desk staff when they checked out.

In total, 159 fully completed Hotel Guest Surveys were collected in 2015.

Hotel Guest Survey Overview

The self-administered printed Hotel Guest Survey was distributed at various lodging properties throughout Louisville. Guests were asked to complete the survey and drop it in the mail at their convenience (postage was paid via BRC). The following Louisville hotels distributed the Hotel Guest Survey:

- Best Western Plus Louisville West
- Brown Hotel
- Courtyard Downtown Louisville
- Econo Lodge Downtown
- Galt House Hotel
- Horseshoe Southern Indiana
- Hyatt Regency Louisville
- Louisville Marriott Downtown
- Marriott Louisville East
- Seelbach Hilton
- Sheraton Louisville Riverside



The Galt House Hotel. Digital image. www.GaltHouse.com. Web.

Snapshot of Findings

The following two slides illustrate key findings from the survey.

The Louisville Visitor – Snapshot of Findings

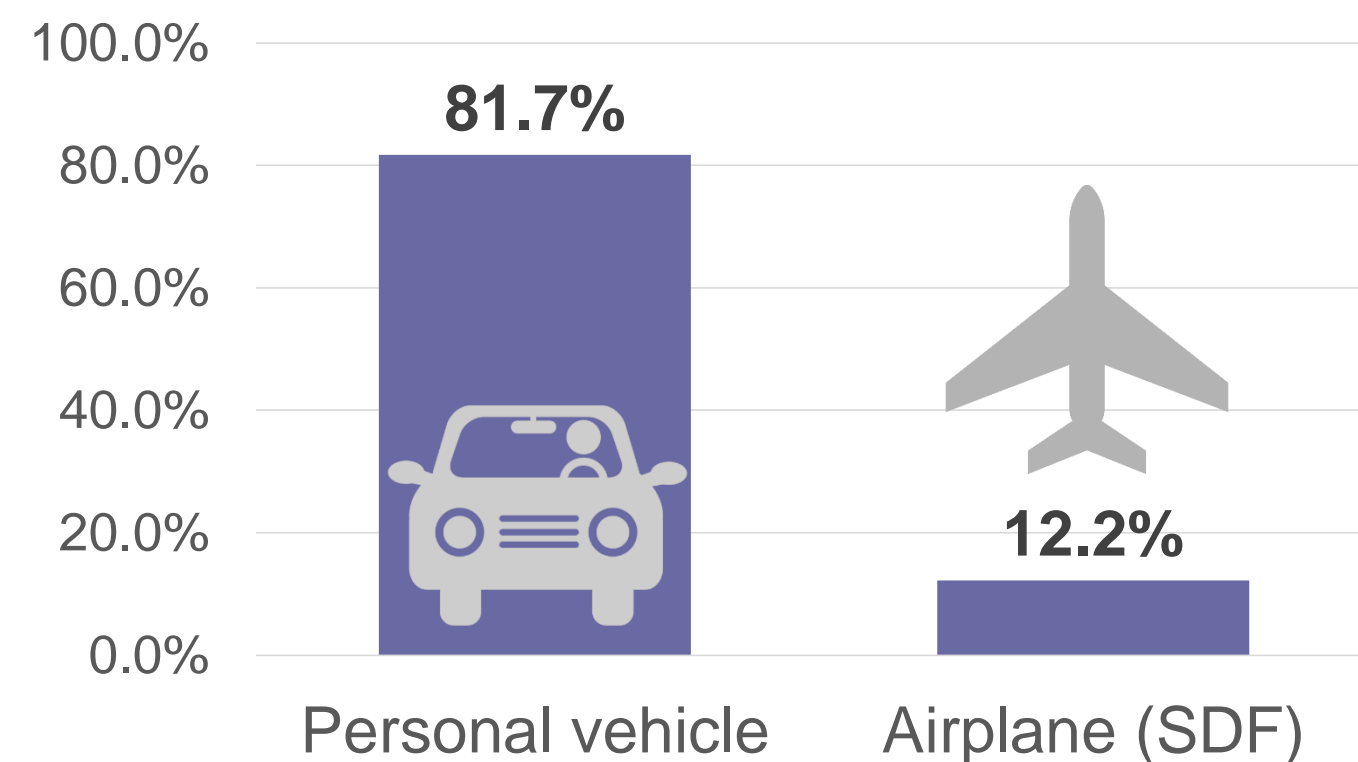
Primary Reasons for Visiting Louisville (% of respondents)



Visitor Trip Details (% of respondents)

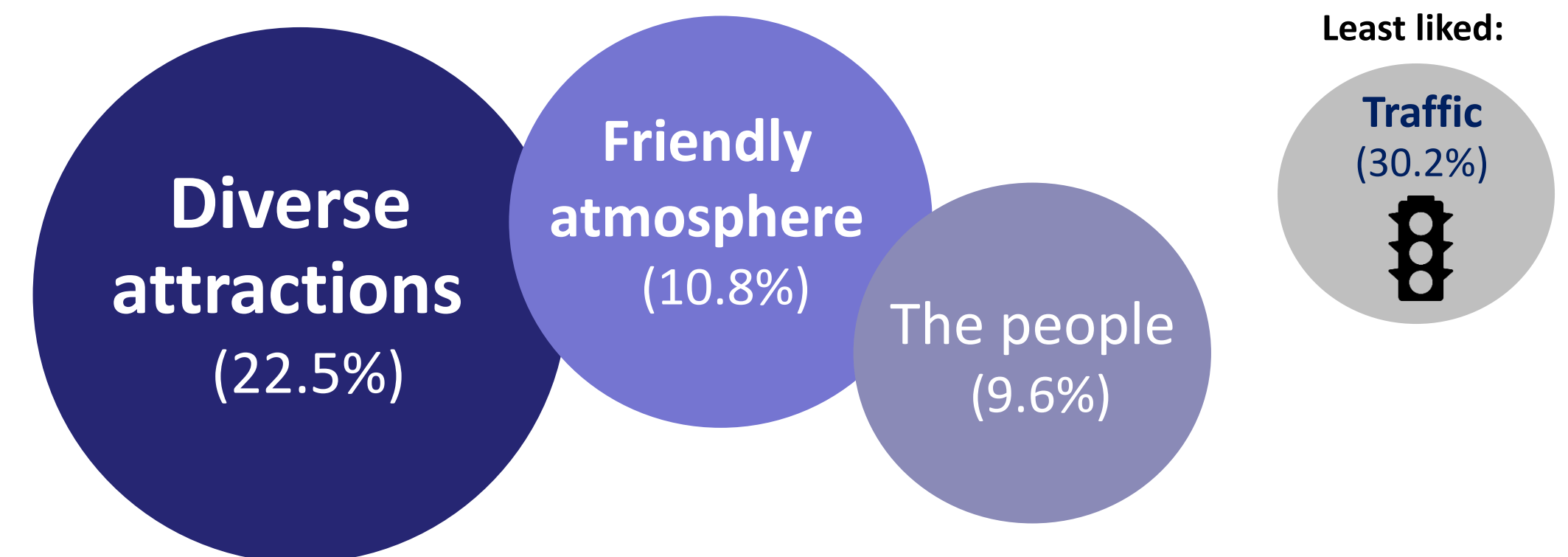


Method of Arrival into Louisville (% of respondents)



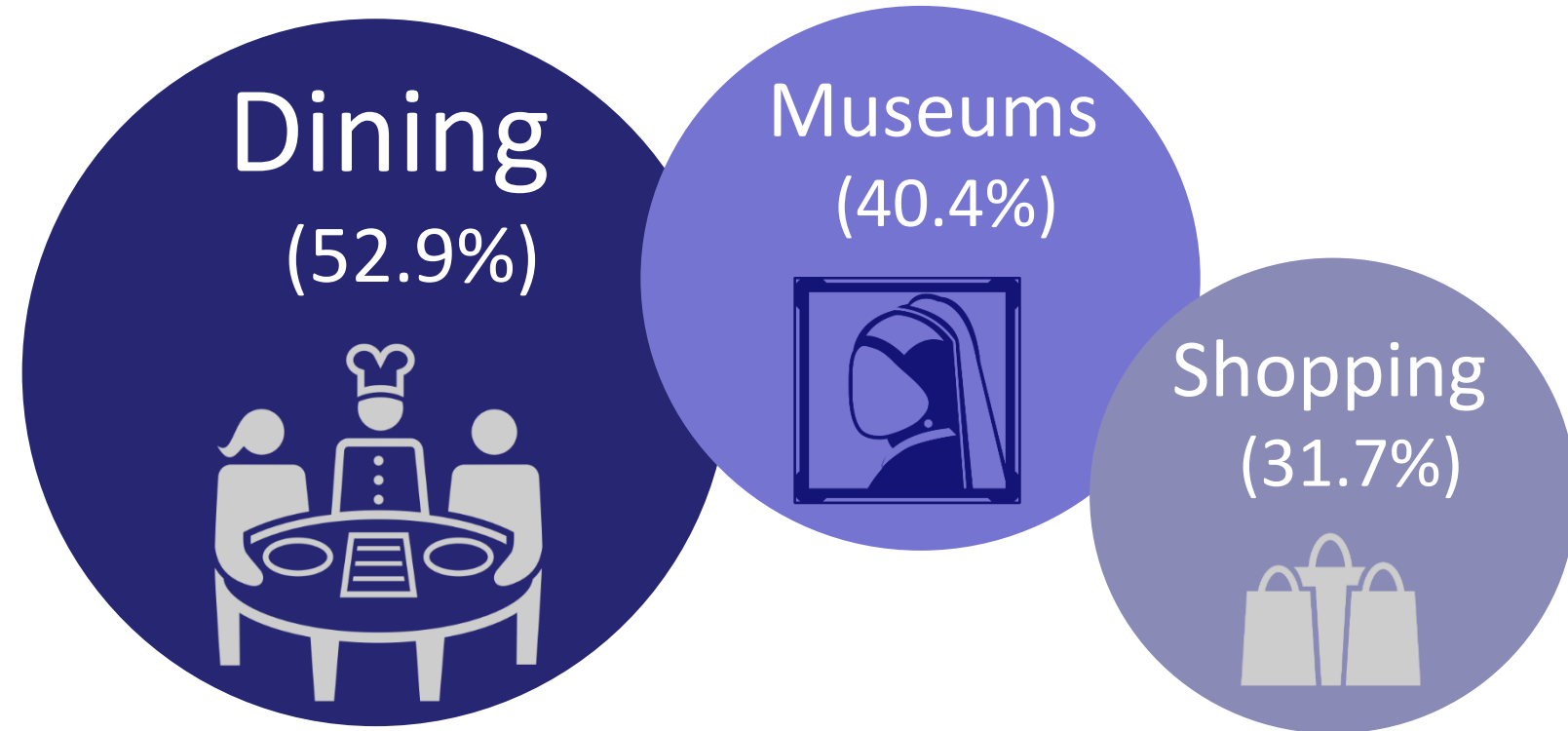
Arrival by personal vehicle was the dominant method of arrival among Louisville visitors. This was followed by arrival via commercial airline (SDF).

Most Liked Aspects & Least Liked Aspect of Louisville (% of respondents)

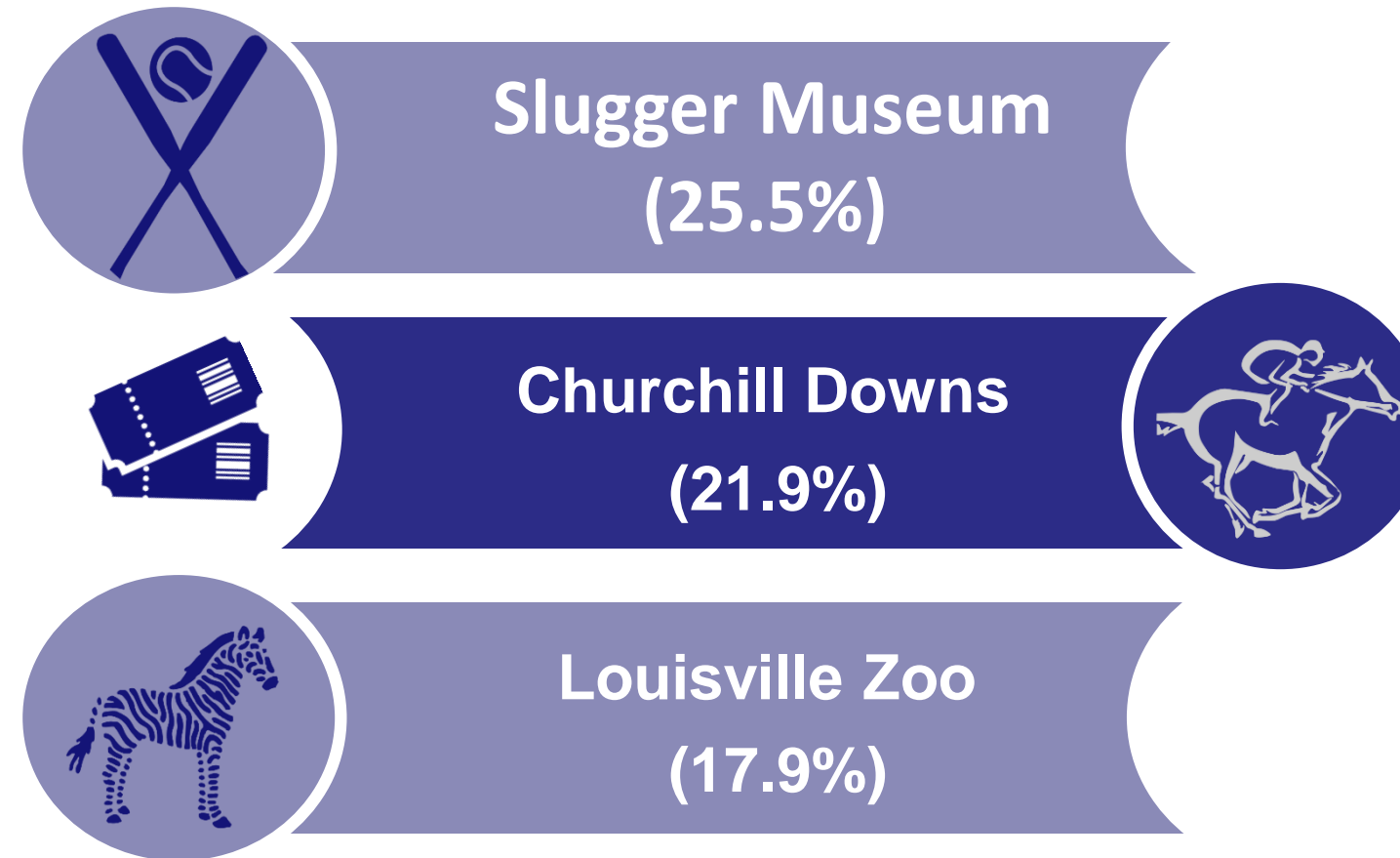


The Louisville Visitor – Snapshot of Findings (continued)

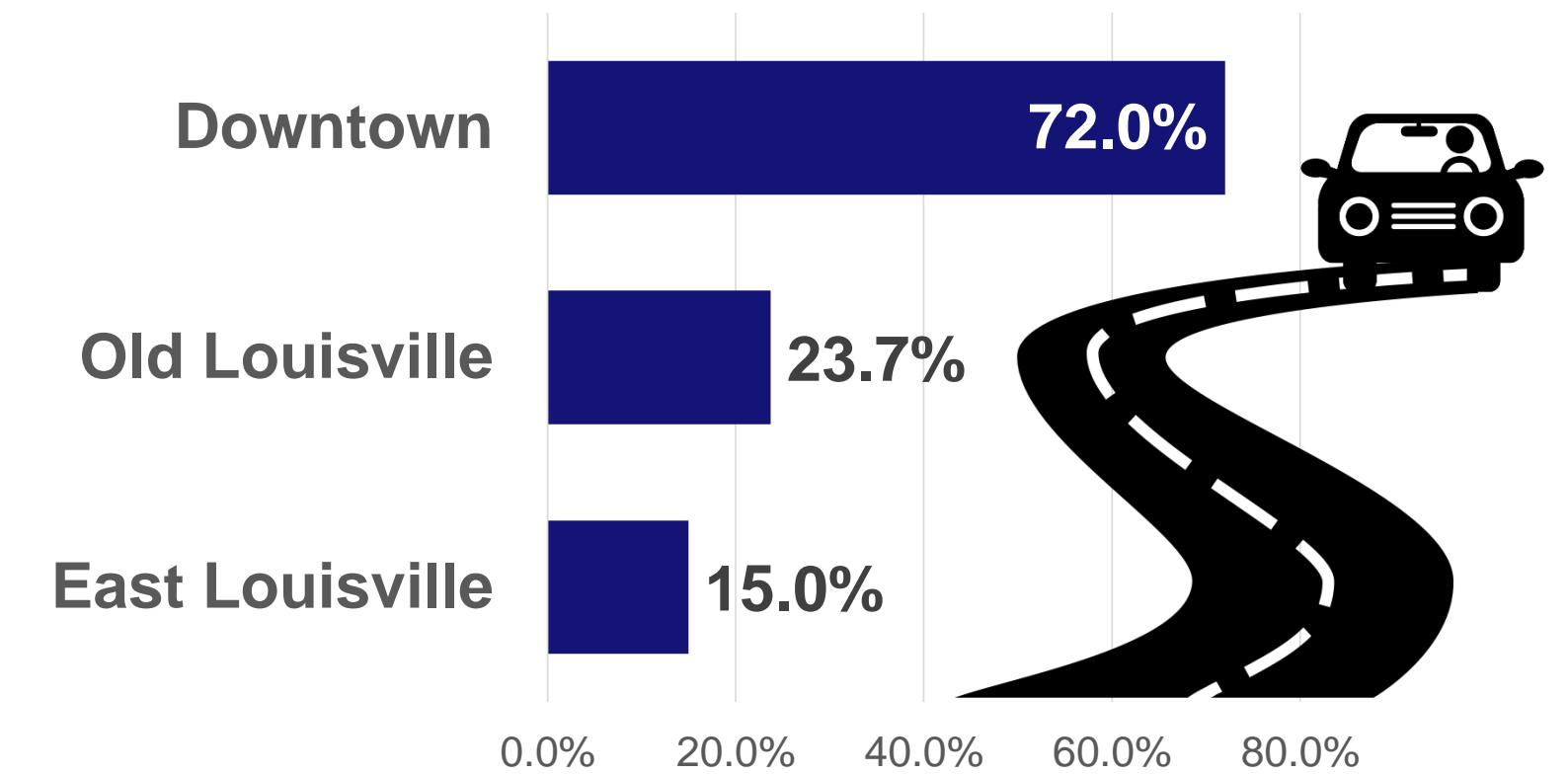
Top Louisville Activities (% of respondents who reported participating in each activity)



Top Attractions Visited (% of respondents)



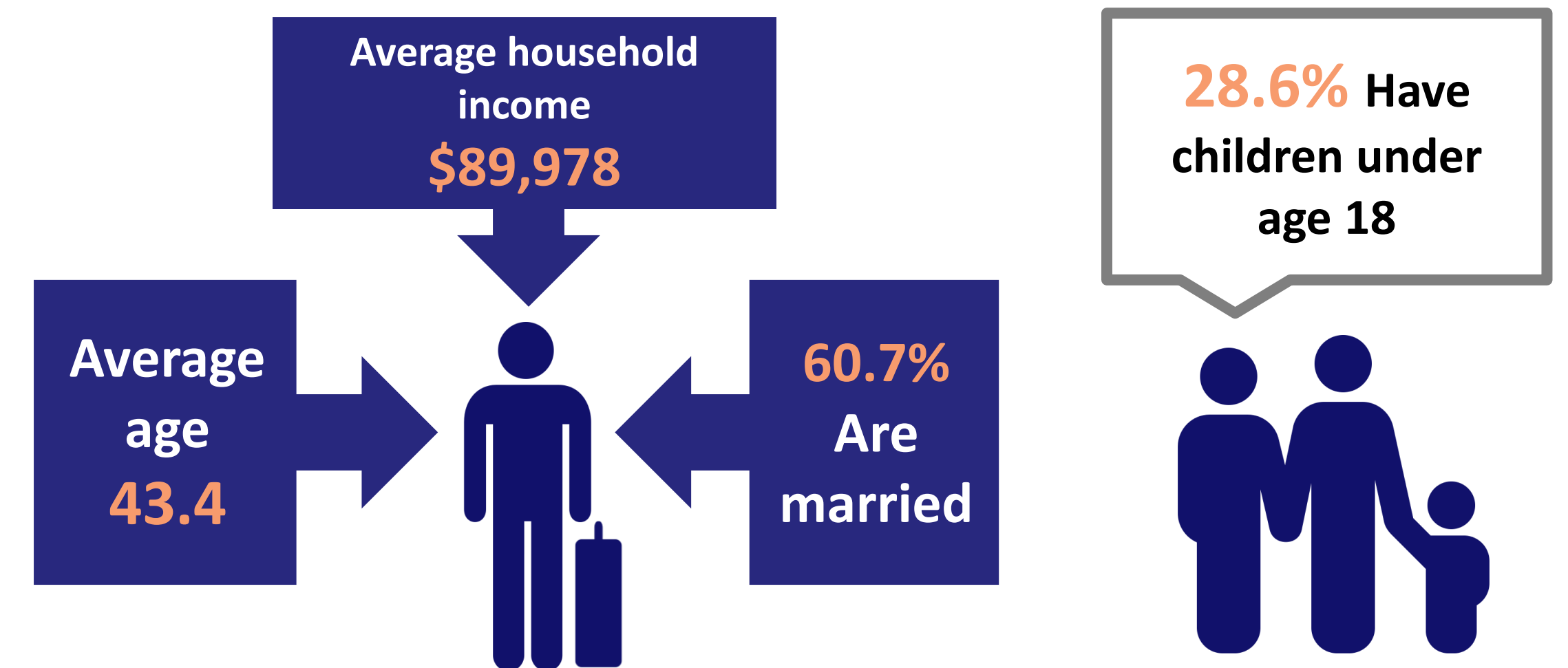
Top Louisville Neighborhoods Visited (% of respondents)



Top Travel Planning Resources (combined in-market & out of market usage) (% of respondents)



Traveler Demographics (% of respondents)



ABOUT THIS REPORT

In the remainder of this report, data from the survey findings is presented as follows:

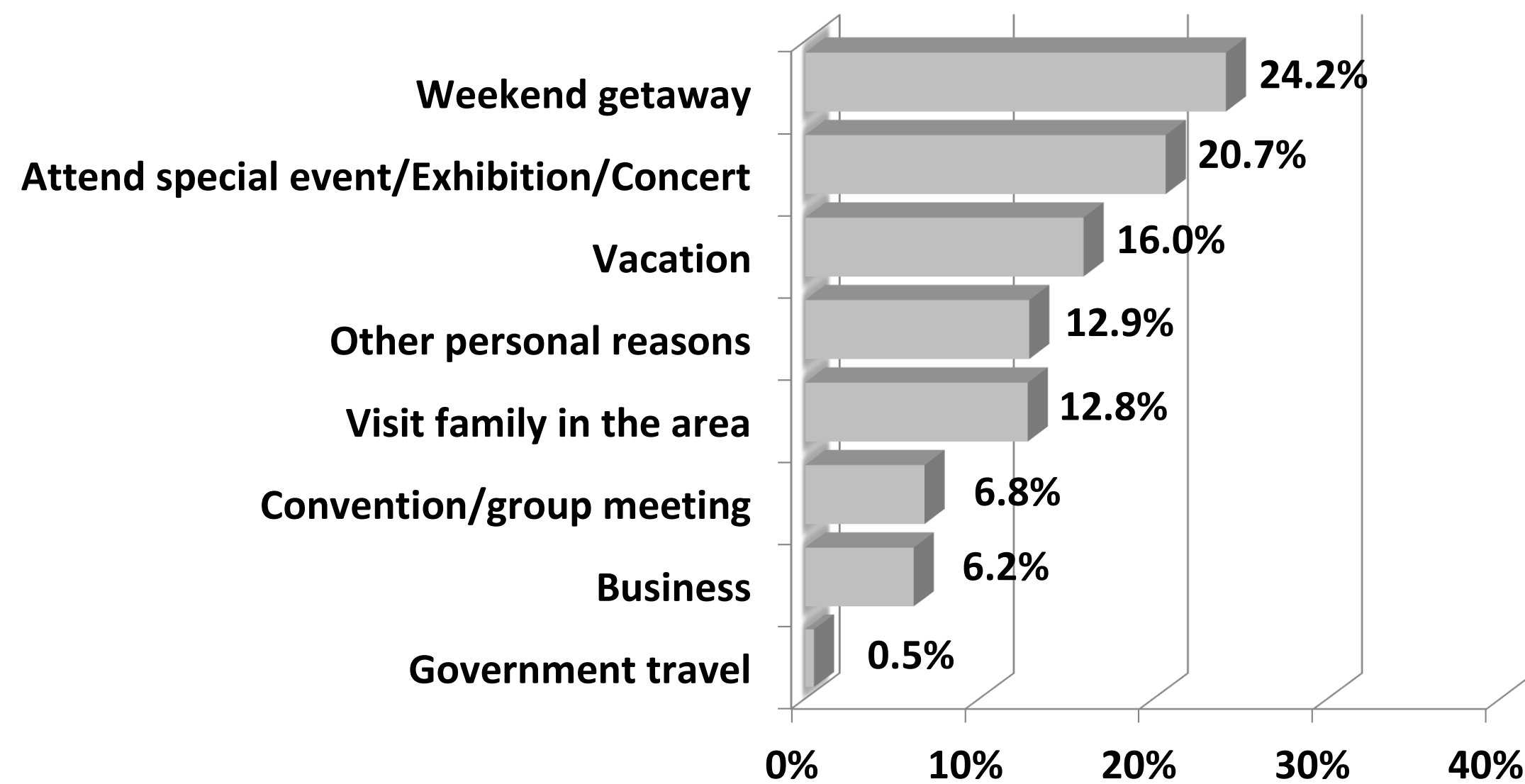
- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by visitor place of stay:
 1. Hotel—Visitors who stayed overnight at a Louisville hotel during their trip
 2. VFR—Visitors who stayed overnight in a private residence of a friend or family member in Louisville
 3. Day Trip—Visitors who did not stay overnight anywhere in Louisville

Detailed Findings

Primary Reason for Louisville Trip

In total, 86.6 percent of Louisville visitors surveyed came to the city primarily for leisure purposes, while the remaining 13.4 percent came for business, conventions/group meetings and government travel. In total, top reasons included a weekend getaway (24.2%), attending a special event/exhibition/concert (20.7%) or vacation (16.0%).

Chart 1: Primary Reason for Louisville trip



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

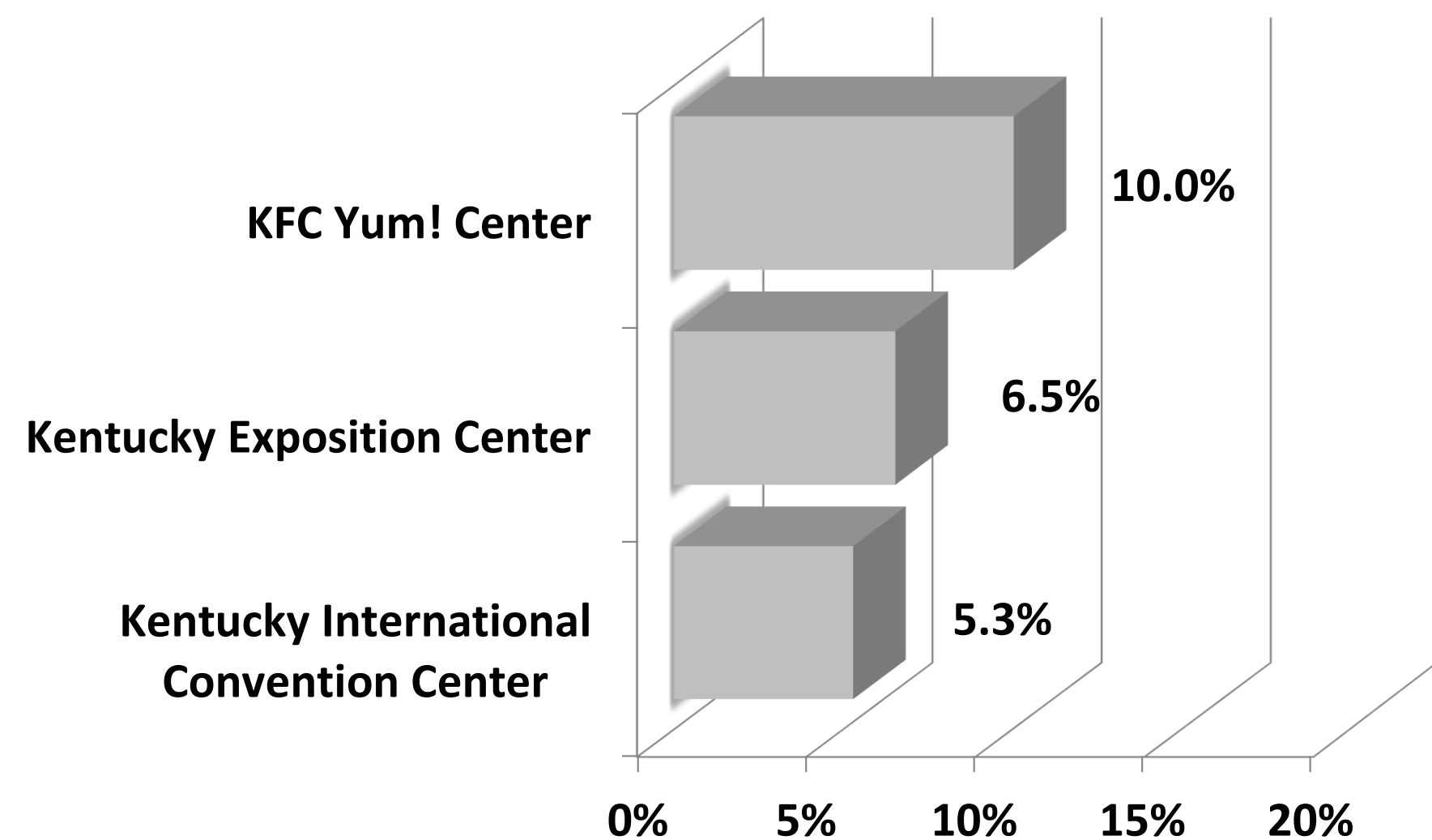
	Hotel	VFR	Day Trip
Weekend getaway	17.7%	11.8%	29.1%
Attend special event/Exhibition/Concert	26.0%	10.8%	20.0%
Vacation	18.3%	12.3%	14.4%
Other personal reasons	2.7%	6.9%	17.5%
Visit family in the area	5.0%	51.2%	11.1%
Convention/group meeting	16.2%	2.5%	3.8%
Business	14.0%	3.9%	3.5%
Government travel	0.1%	0.5%	0.7%
Sample Size	1263	203	850

Question: What is your primary reason for visiting Louisville?

Attended Meetings/Events at Major Venues

Visitors were asked if they attended any meetings or events at three major Louisville event spaces. In total, 10.0 percent of respondents said they indeed had attended a meeting or event at the KFC Yum! Center. Additionally, 6.5 percent attended a meeting or event at the Kentucky Exposition Center and 5.3 percent attended an event or meeting at the Kentucky International Convention Center. **Over a third of hotel visitors attended a meeting or event at 1 or more these venues (35.8%).**

Chart 2: Attended Meetings/Events at Major Venues



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

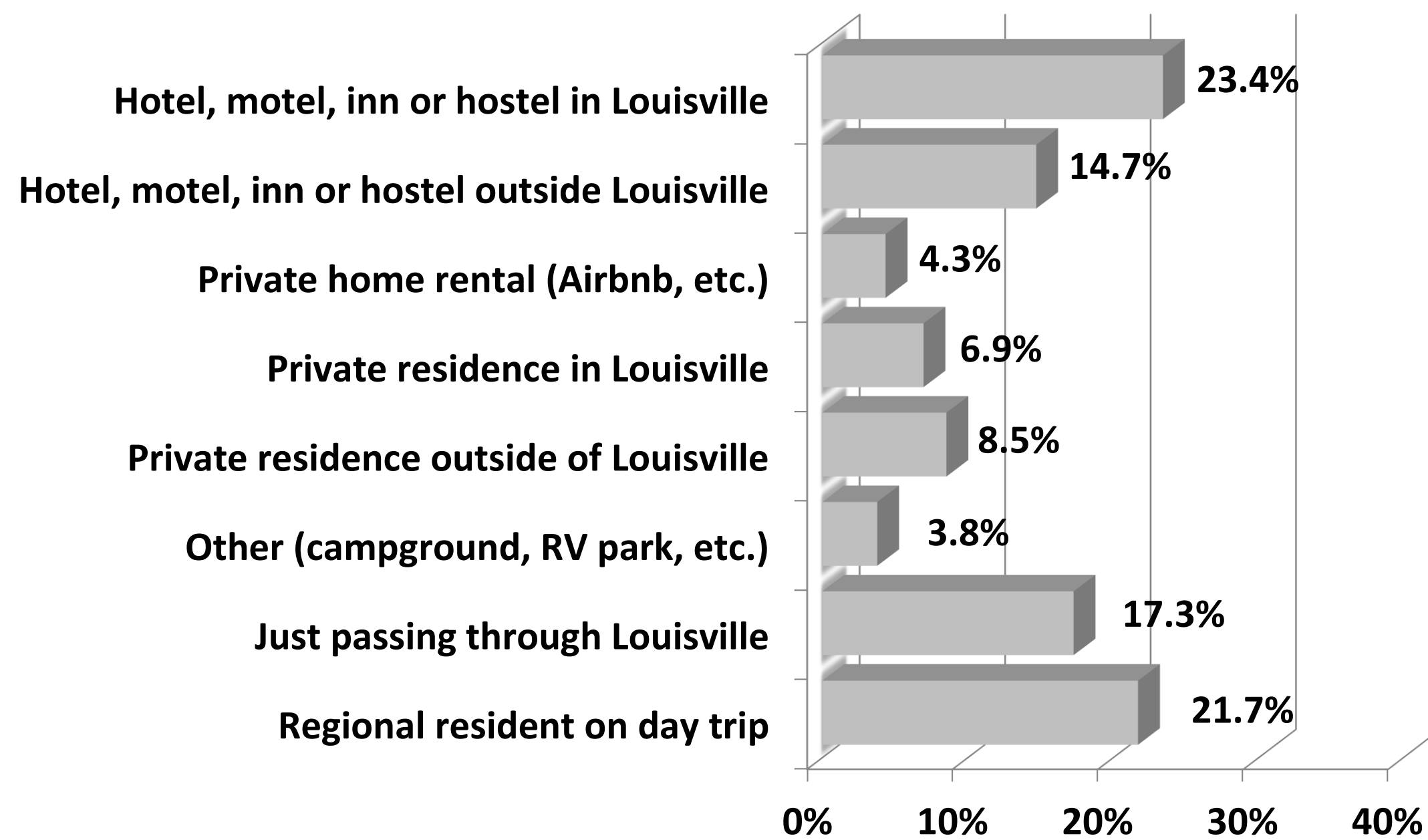
	Hotel	VFR	Day Trip
KFC Yum! Center	13.5%	11.1%	8.5%
Kentucky International Convention Center	13.0%	4.3%	4.8%
Kentucky Exposition Center	13.5%	5.3%	2.9%
Attended meeting or event at 1 or more of these venues	35.8%	16.8%	12.0%
Sample Size	1296	208	884

Question: Did you - or will you – attend any meetings or events at any of the following? (Select all that apply)

Place of Stay

Louisville has a strong mix of both overnight visitors and day trip visitors. In total, 34.6 percent of Louisville visitors surveyed stayed overnight in the city during their visit, including 23.4 percent who stayed in a Louisville hotel, 6.9 percent who stayed in a private residence in Louisville (VFR) and 4.3 percent who stayed in a private home rental. Day-trippers represented 39.0 percent of visitors surveyed based on 21.7 percent of these day-trippers being regional residents on day trip and 17.3 percent just passing through.

Chart 3: Place of Stay



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Hotel, motel, inn or hostel in Louisville	100.0%	0.0%	0.0%
Hotel, motel, inn or hostel outside of Louisville	0.4%	0.0%	23.9%
Private home rental (Airbnb, VRBO, Homeaway, etc.)	--	--	--
Private residence in Louisville	0.0%	100.0%	0.0%
Private residence outside of Louisville	0.1%	0.0%	13.8%
Other (campground, RV park, etc.)	--	--	--
Just passing through Louisville	0.0%	0.5%	27.9%
Regional resident on day trip	0.0%	0.0%	34.8%
Sample Size	1298	208	884

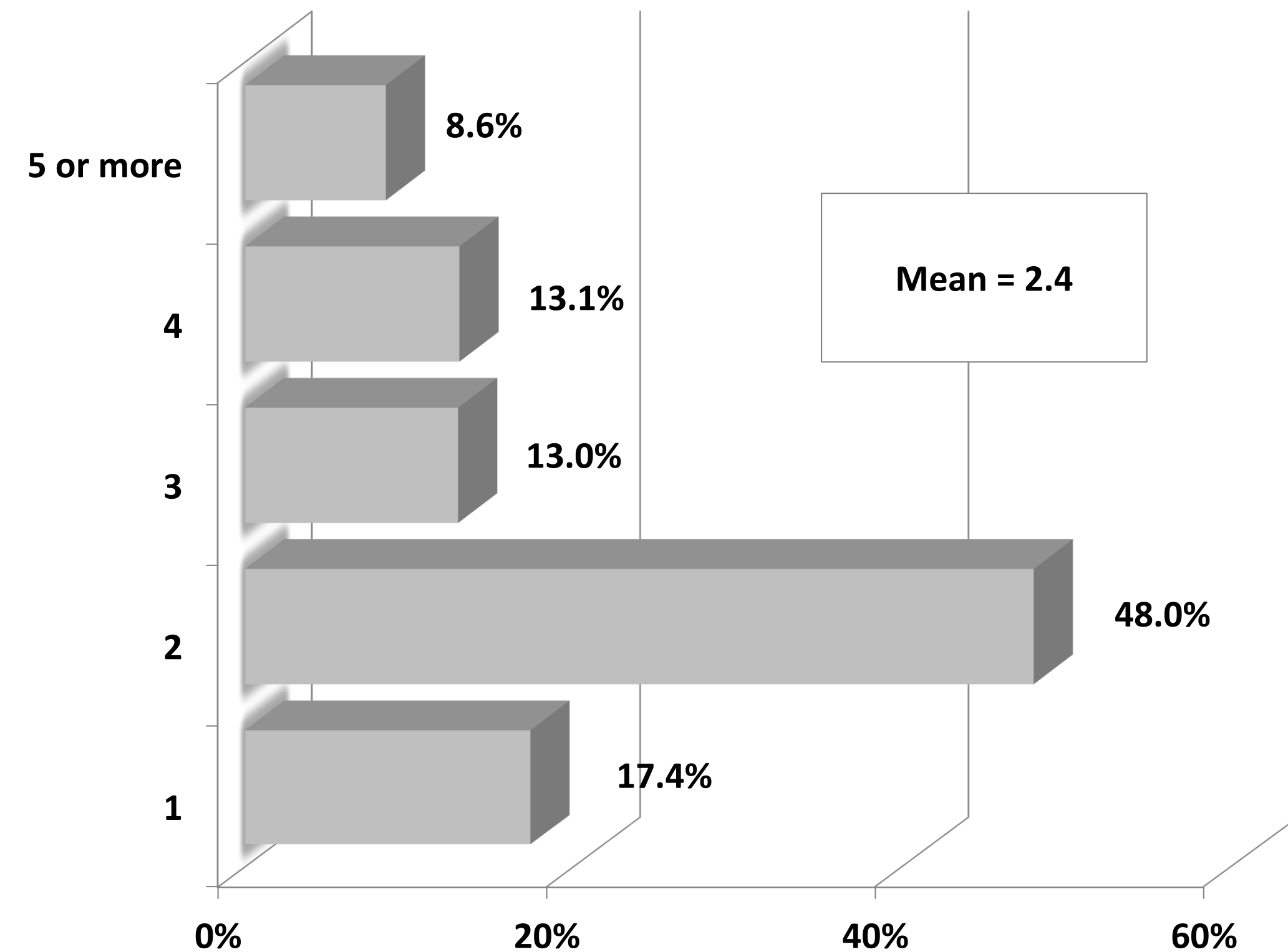
Question: Where are you staying while on this trip to Louisville?

Hotel Guests: Number of People in Hotel Room

Louisville visitors who stayed in a hotel were asked how many people stayed in their hotel room with them. Nearly 50 percent stayed with one other person while 17.4 percent were the sole occupant of their hotel room. **The average hotel room accommodated 2.4 persons.**

Question: How many people are staying in your hotel room? Base: Respondents who stayed overnight in a Louisville hotel. 1,272 completed surveys

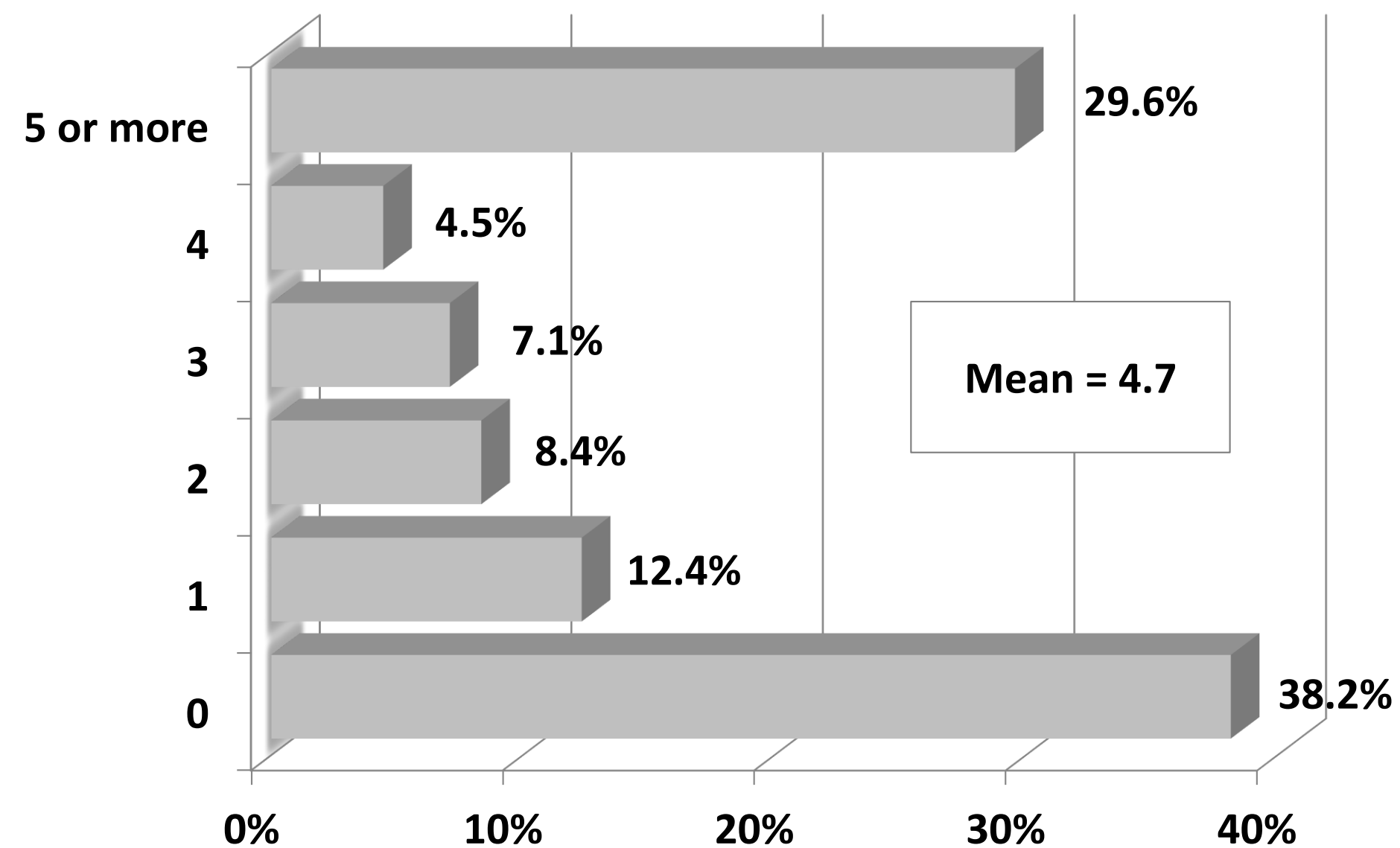
Chart 4: Number of People in Hotel Room



Past Visitation to Louisville

Louisville hosts a substantial number of repeat visitors, although half of hotel guests are first-time visitors. In total, 61.8 percent of all visitors surveyed reported having previously visited Louisville. The average visitor has made 4.7 visits to Louisville—driven primarily by day-trippers (6.0 trips on average) and VFRs (4.7 trips on average). In comparison, with 51.5 percent being first time visitors, the average number of previous visits to Louisville for hotel guests is 3.1.

Chart 5: Past Visitation to Louisville



Base: All respondents. 2,166 completed surveys

Detail by Type of Visitor

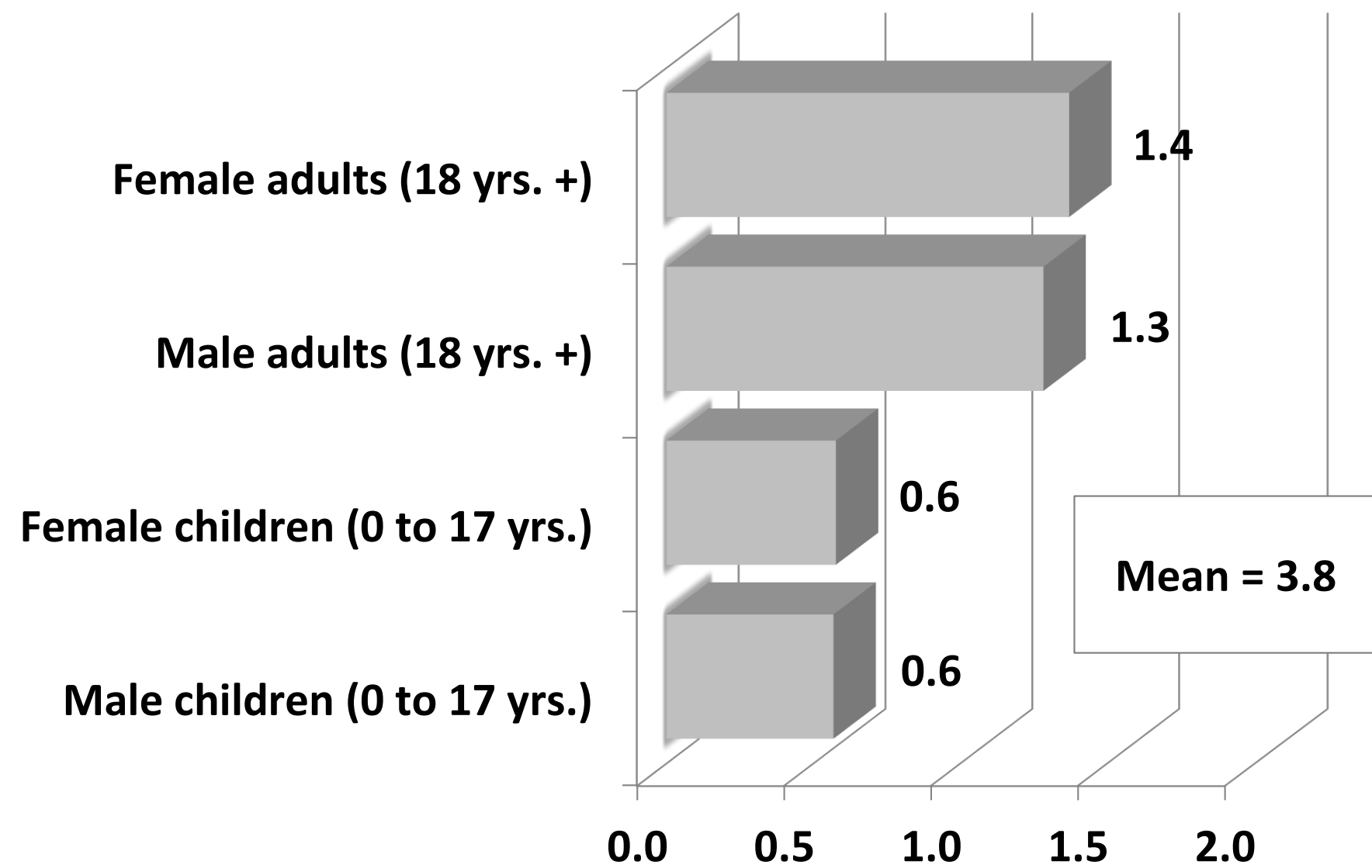
	Hotel	VFR	Day Trip
5 or more	19.3%	32.2%	37.1%
4	2.9%	4.8%	5.8%
3	5.0%	6.8%	7.8%
2	7.7%	12.3%	7.7%
1	13.6%	19.9%	10.3%
0	51.5%	24.0%	31.3%
Mean	3.1	4.7	6.0
Sample Size	1201	172	721

Question: Prior to this visit, how many times have you been to Louisville?
(Zero if this is your first time)

Travel Party Composition

The typical travel party to Louisville was comprised of 3.8 persons. The average travel party included 1.4 adult females and 1.3 adult males. 43.8 percent of travel parties had children in them.

Chart 6: Travel Party Composition



Base: All respondents. 2,427 completed surveys

Detail by Type of Visitor

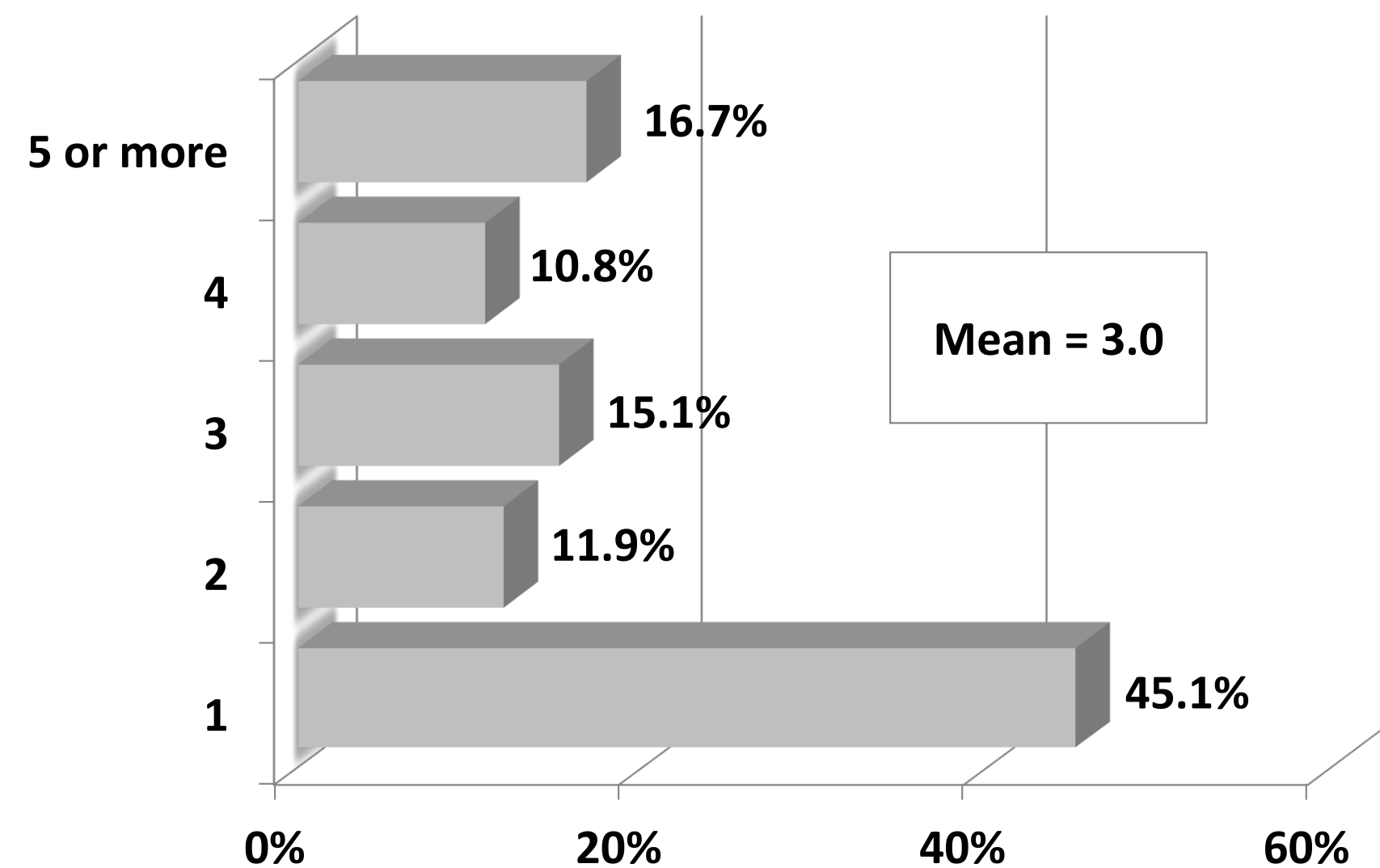
	Hotel	VFR	Day Trip
Female adults (18 yrs. +)	1.2	1.1	1.5
Male adults (18 yrs. +)	1.3	1.0	1.3
Female children (0 to 17 yrs.)	0.3	0.4	0.7
Male children (0 to 17 yrs.)	0.3	0.4	0.7
Mean # of people in travel party	3.2	2.9	4.1
% traveling with children	24.8%	40.9%	52.9%
Sample Size	1267	208	870

Question: How many people of each type are in your immediate traveling party, including yourself?

Days in Louisville

The Louisville visitor spent on average 3.0 days in the city during their trip. Visitors staying in private homes in the city had the longest length of stay with an average of 6.3 days. Those staying in Louisville hotels spent an average of 3.7 days in the city.

Chart 7: Days in Louisville



Base: All respondents. 2,263 completed surveys

Detail by Type of Visitor

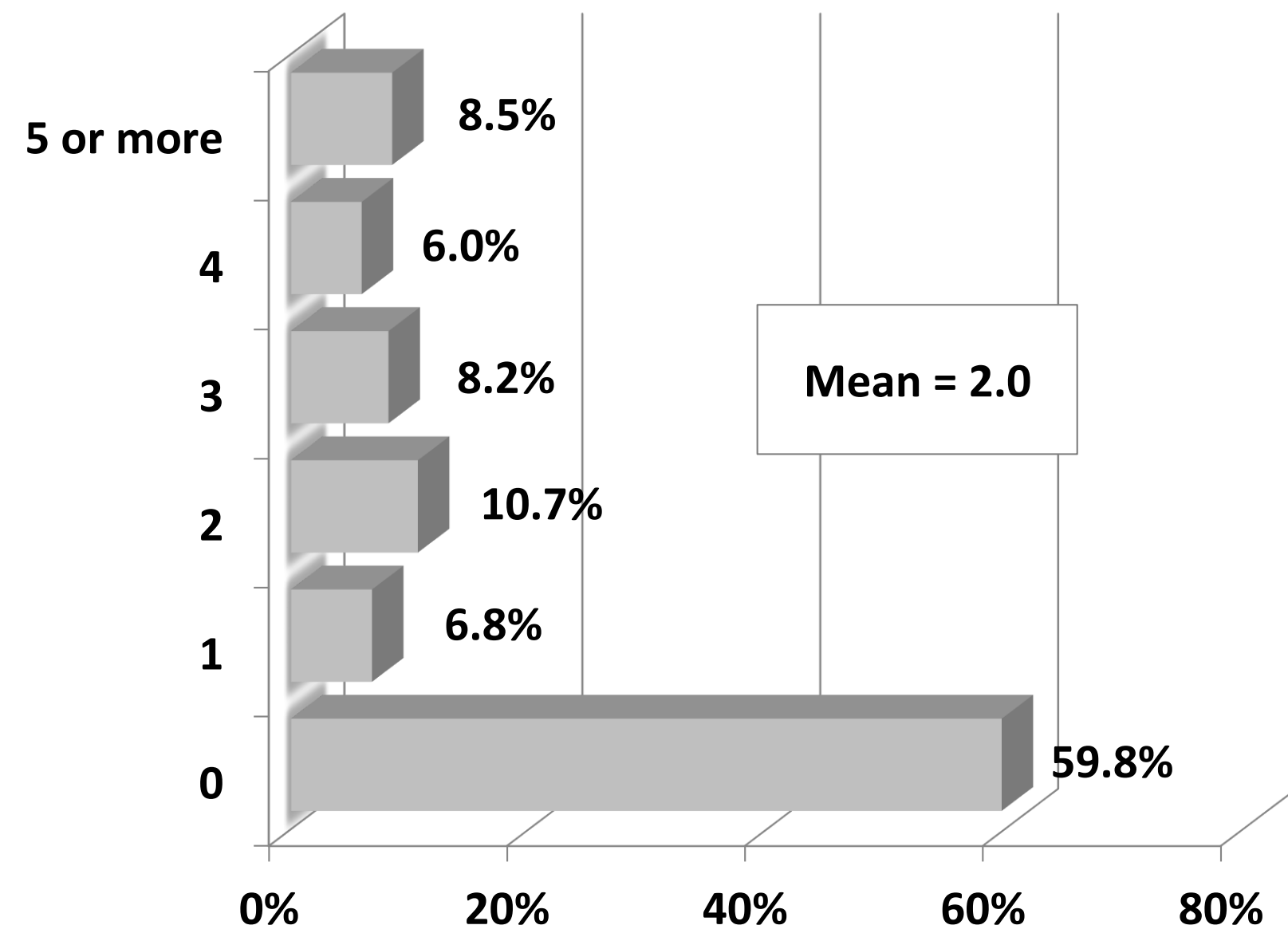
	Hotel	VFR	Day Trip
5 or more	26.7%	36.9%	6.6%
4	18.9%	21.0%	5.8%
3	22.2%	24.1%	10.8%
2	23.0%	12.8%	7.1%
1	8.7%	5.1%	69.7%
Mean	3.7	6.3	2.0
Sample Size	1254	195	747

Question: How many days and nights are you staying in Louisville?

Nights in Louisville

The Louisville visitor spent on average 2.0 nights in the city during their trip. VFRs stayed 5.5 nights on average, while Hotel guests stayed 3.0 nights.

Chart 8: Nights in Louisville



Base: All respondents. 2,263 completed surveys

Detail by Type of Visitor

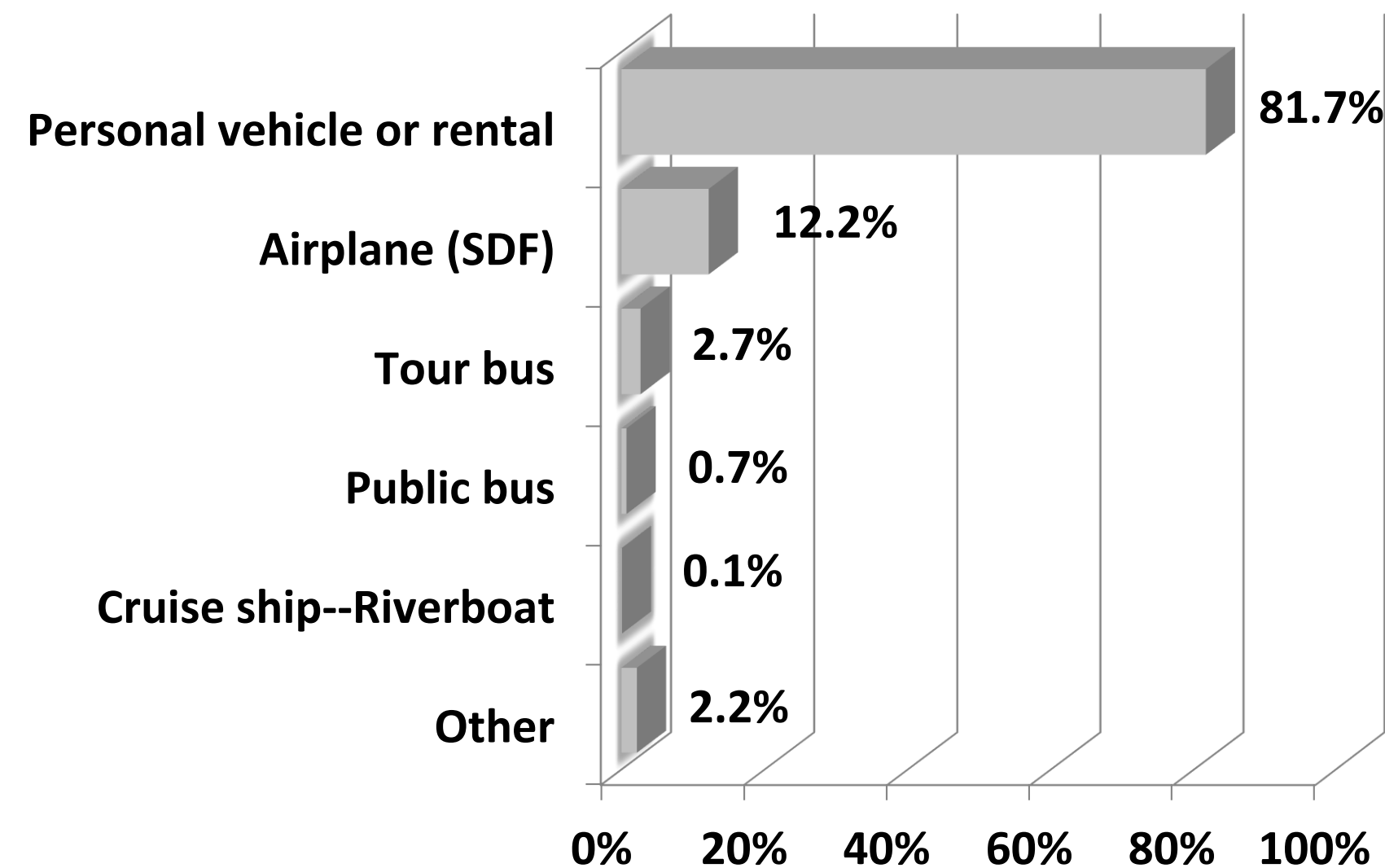
	Hotel	VFR	Day Trip
5 or more	14.4%	30.8%	0.0%
4	16.4%	10.3%	0.0%
3	19.3%	24.1%	0.0%
2	28.0%	23.1%	0.0%
1	19.0%	6.7%	0.0%
0	2.6%	5.1%	100.0%
Mean	3.0	5.5	--
Sample Size	1254	195	747

Question: How many total days and nights are you staying in Louisville?

Method of Arrival

Eight-in-ten visitors arrived to Louisville in a personal or rental vehicle (81.7%). The next most common method of arrival was flying into the Louisville International Airport (SDF), reported by approximately one-in-ten visitors (12.2%).

Chart 9: Method of Arrival



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

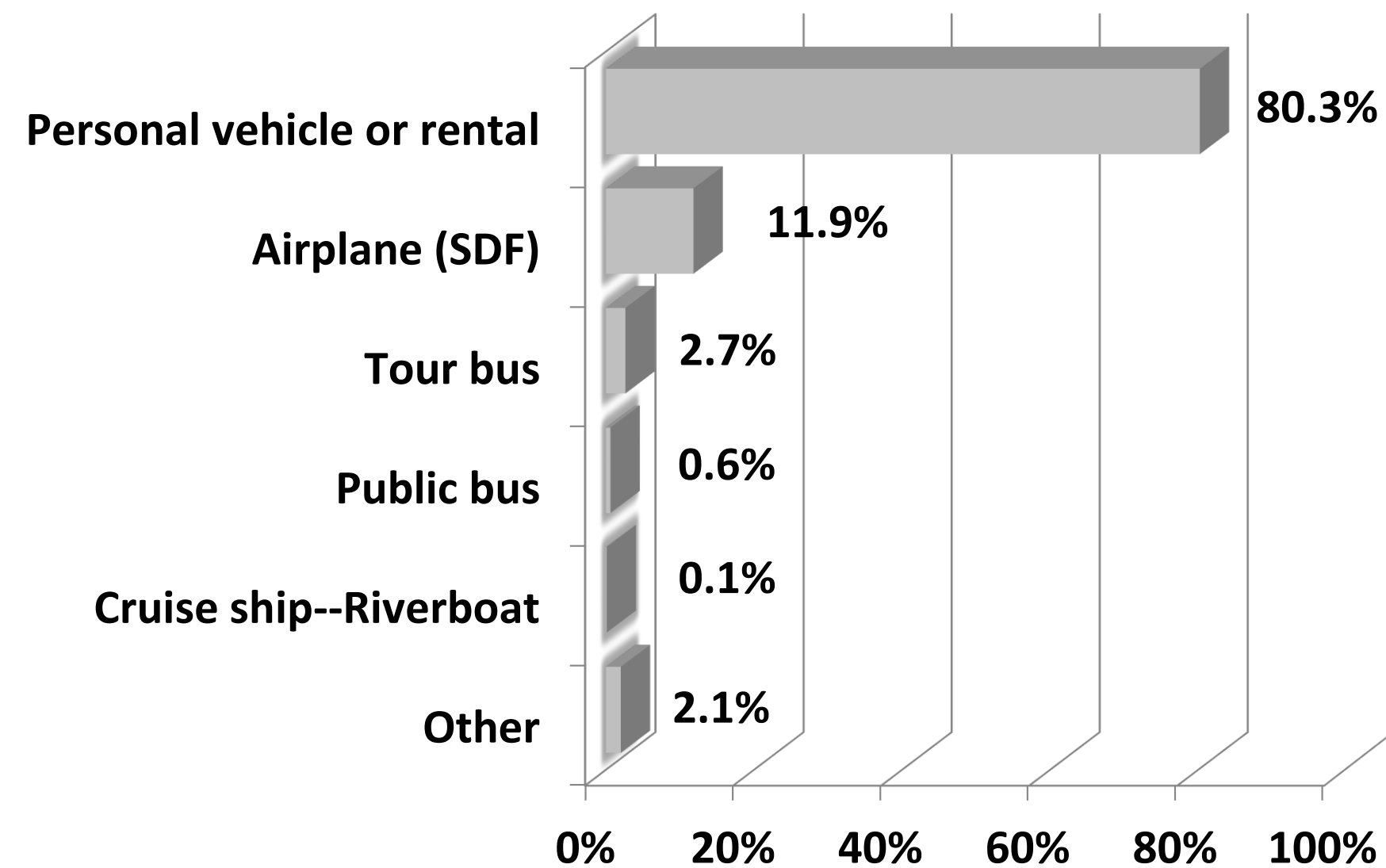
	Hotel	VFR	Day Trip
Personal vehicle or rental	67.2%	76.0%	87.7%
Airplane (SDF)	28.4%	25.0%	5.8%
Tour bus	3.0%	0.0%	3.2%
Public bus	0.9%	0.0%	0.6%
Cruise ship--Riverboat	0.0%	0.0%	0.1%
Other	0.9%	0.5%	2.4%
Sample Size	1298	208	884

Question: Please tell us how you arrived in Louisville and how you will leave?

Method of Departure

Louisville's visitors primarily depart via the same mode in which they arrived.

Chart 10: Method of Departure



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

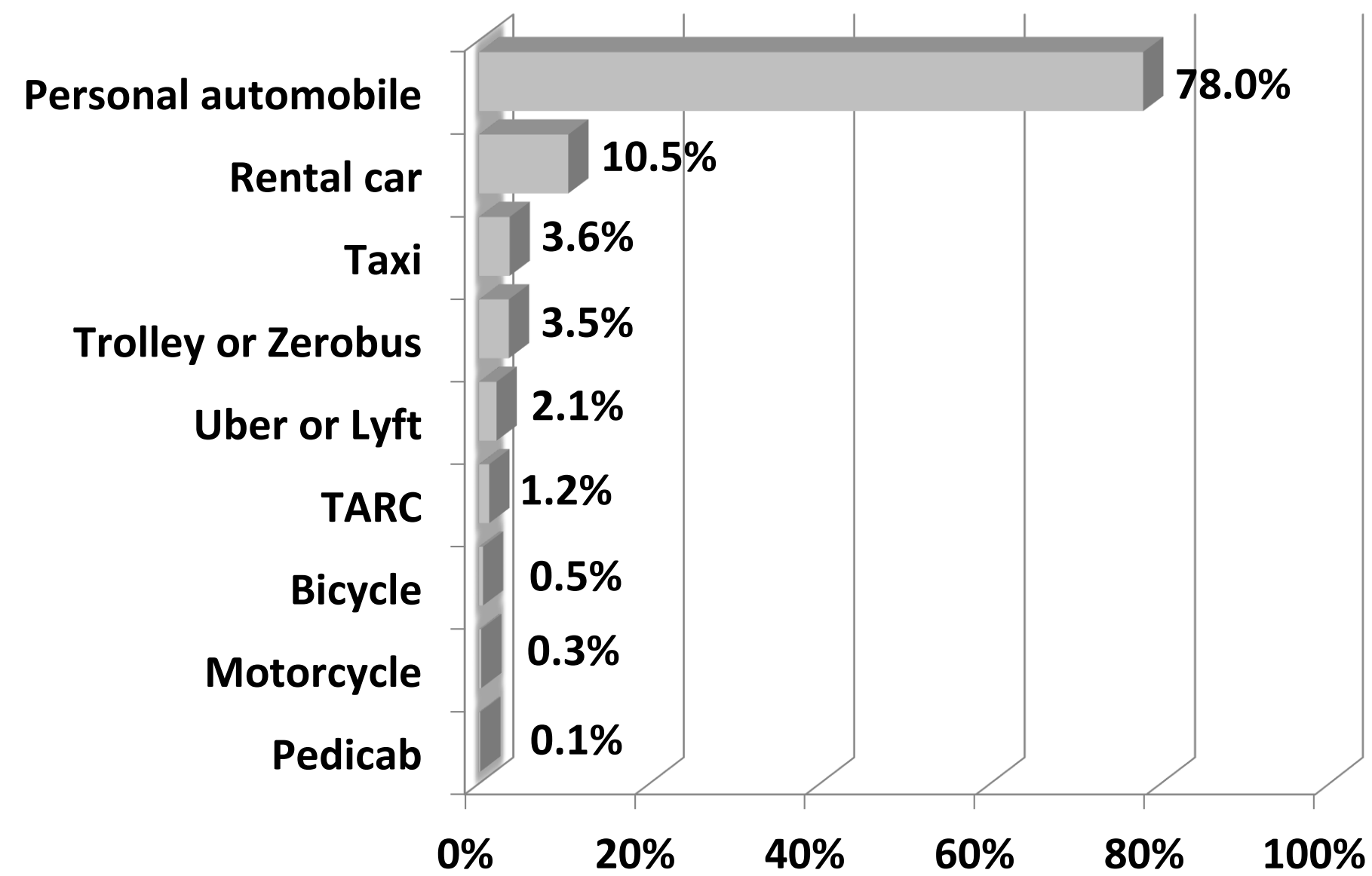
	Hotel	VFR	Day Trip
Personal vehicle or rental	65.3%	74.0%	86.0%
Airplane (SDF)	27.6%	24.5%	5.5%
Tour bus	2.9%	0.0%	3.2%
Public bus	0.9%	0.0%	0.5%
Cruise ship--Riverboat	0.2%	0.0%	0.1%
Other	1.0%	0.5%	1.9%
Sample Size	1298	208	884

Question: Please tell us how you arrived in Louisville and how you will leave?

Modes of Transportation In-Market

The use of a personal automobile is the most popular mode of transportation used by visitors in Louisville, reported by 78.0 percent of visitors surveyed. This was followed by the use of rental cars (10.5%). Taxis were used by 3.6 percent, while ride-sharing services like Uber and Lyft were used by 2.1 percent. 4.7 percent of visitors used public transportation during their visit, including the trolley or Zerobus (3.5%) and TARC (1.2%). Hotel guests were generally the likeliest to use different types of transportation.

Chart 11: Modes of Transportation



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

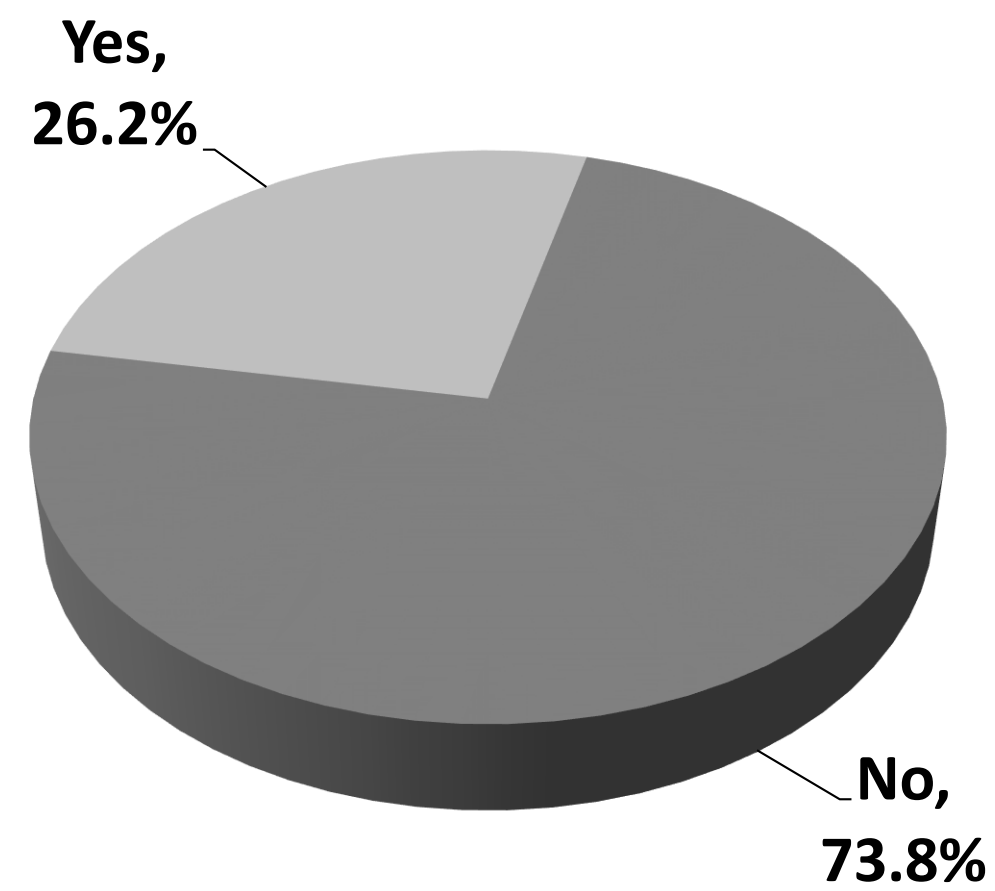
	Hotel	VFR	Day Trip
Personal automobile	60.4%	88.0%	83.1%
Rental car	18.7%	8.2%	8.3%
Taxi	11.0%	0.5%	1.5%
Trolley or Zerobus	8.9%	2.4%	2.1%
Uber or Lyft	4.5%	2.4%	0.9%
TARC	2.3%	1.4%	0.9%
Bicycle	0.5%	1.9%	0.3%
Motorcycle	0.2%	0.0%	0.1%
Pedicab	0.6%	0.0%	0.0%
Sample Size	1298	208	884

Question: Which modes of transportation did you (or will you) use while in Louisville?

Leisure Group

Over a quarter of Louisville visitors surveyed reported being a part of a leisure/personal-related group for their visit (26.2%).

Chart 12: Leisure Group



Base: All respondents. 2,397 completed surveys

Detail by Type of Visitor

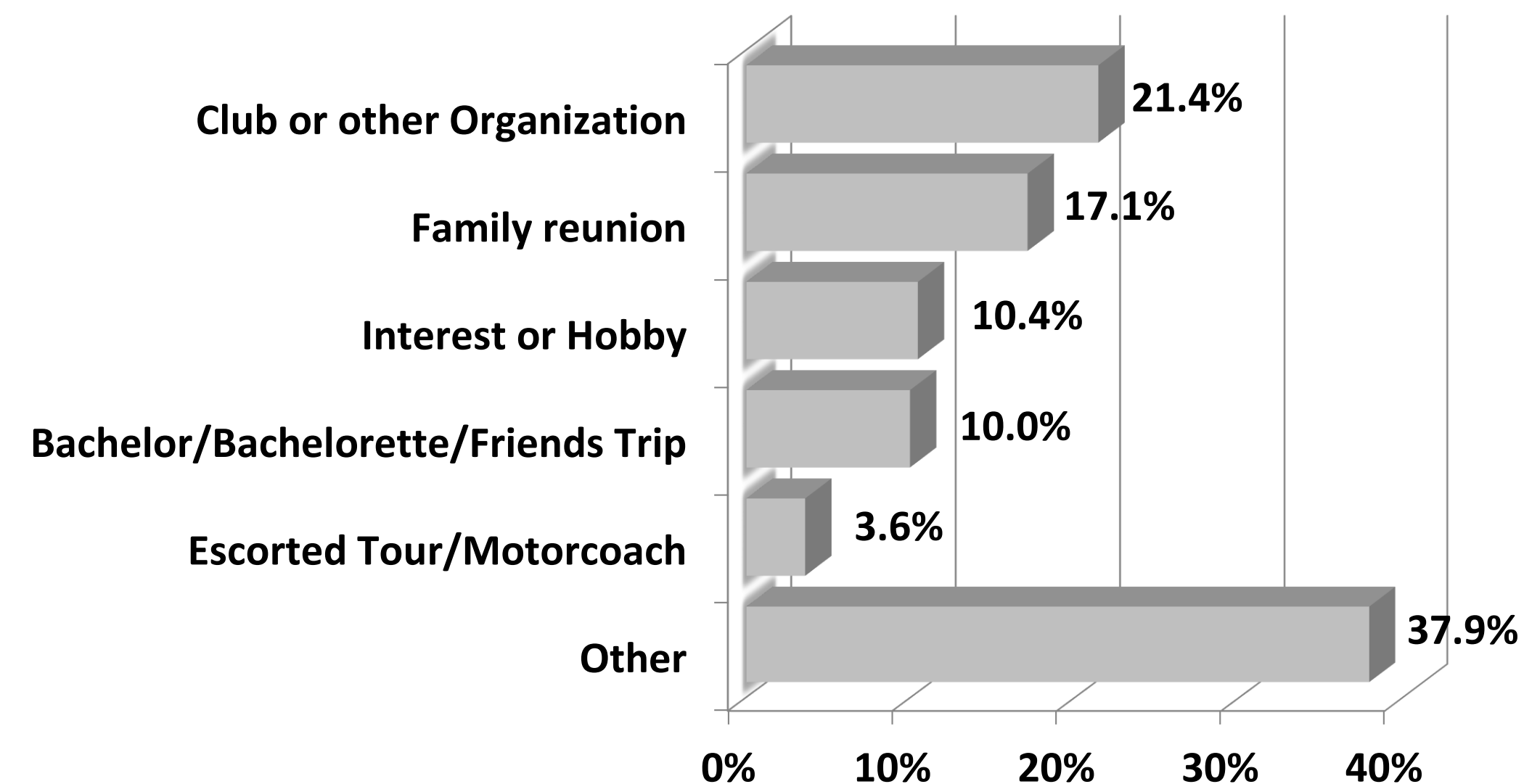
	Hotel	VFR	Day Trip
Yes	30.5%	20.8%	24.4%
No	69.5%	79.2%	75.6%
Sample Size	1259	202	854

Question: Are you visiting Louisville as part of a leisure/personal-related group?

Leisure Group Visitors: Type of Leisure Group

Visitors who reported being a part of a leisure group were asked to categorize the type of group they were traveling with. **Clubs and other organizations make up a large proportion of Louisville’s leisure group segment at 21.4%.** Those on family reunions represented 17.1 percent of leisure group visitors.

Chart 13: Type of Leisure Group



Base: Respondents who reported being part of a leisure group. 639 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Club or other Organization	31.8%	4.8%	18.3%
Family reunion	13.6%	47.6%	15.9%
Interest or Hobby	12.3%	11.9%	10.1%
Bachelor/Bachelorette/Friends Trip	8.1%	7.1%	10.1%
Escorted Tour/Motorcoach	2.8%	0.0%	4.8%
Other	33.4%	21.4%	42.3%
Sample Size	359	42	208

Question: Which describes the type of group you are visiting Louisville with? (Select all that apply)

Activities in Louisville

Louisville’s visitors engage in a myriad of activities during their trip, with the most popular being dining in restaurants (52.9%), visiting museums (40.4%), shopping (31.7%) and bourbon tasting (21.7%). Other popular activities included distillery tours (14.2%), visiting a State or local park (13.6%) and attending other festivals or special events (12.4%).

Question: Which of these activities did you (or will you) participate in while in Louisville? (Select all that apply) Base: All respondents. 2,486 completed surveys

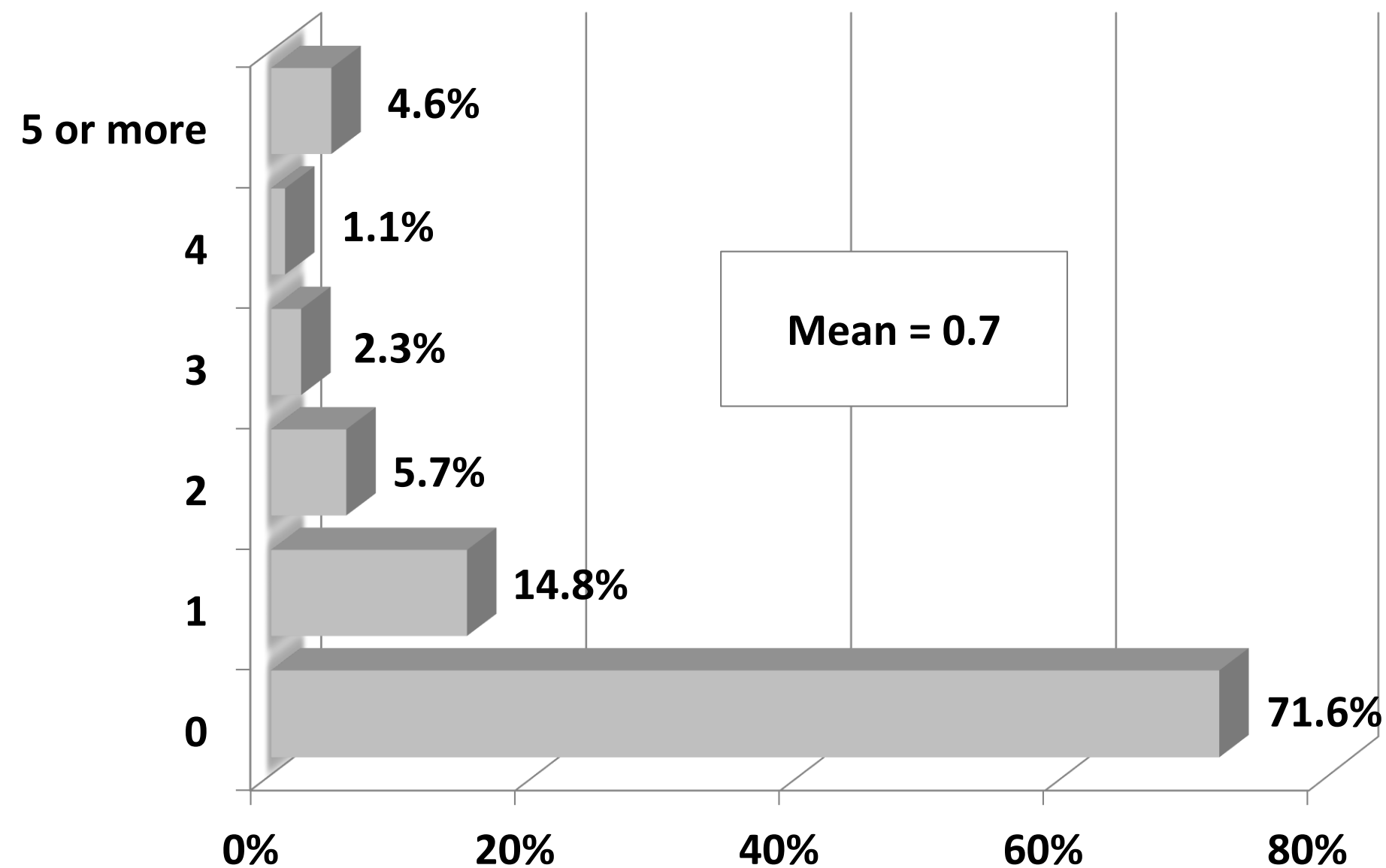
Table 14: Activities in Louisville

	Total Answering	Hotel	VFR	Day Trip
Dining in restaurants	52.9%	70.0%	65.4%	44.7%
Museums/art galleries/art walks, etc	40.4%	43.9%	52.4%	37.9%
Shopping	31.7%	41.2%	52.9%	26.1%
Bourbon tasting	21.7%	31.2%	24.0%	15.5%
Distillery tour	14.2%	21.0%	15.4%	9.6%
Visit a state or local park	13.6%	9.4%	20.2%	14.6%
Other festival or special event	12.4%	17.3%	20.7%	9.5%
Take a river cruise	10.5%	9.8%	13.5%	10.5%
Sporting event	9.3%	14.3%	12.0%	7.0%
Guided tours	7.9%	10.2%	9.6%	6.1%
Urban Bourbon Trail	5.9%	7.7%	7.2%	4.1%
Performing arts (theater, live music, etc)	5.7%	6.9%	9.6%	5.1%
Historic homes	3.4%	4.8%	8.2%	2.5%
Visit a casino	2.8%	2.4%	5.3%	2.8%
Hiking	2.8%	1.8%	5.8%	1.7%
Visit a farmer’s market	2.7%	2.1%	8.2%	2.4%
Golf	2.4%	1.7%	3.8%	2.3%
Other culinary activities	1.9%	2.6%	2.4%	1.1%
Biking	1.8%	1.2%	3.4%	1.8%
Spa visit or treatment	1.8%	2.1%	2.9%	1.7%
Bike, Segway or GoKart rental	1.1%	1.2%	3.8%	0.9%
Sample Size	2486	1298	208	884

Bourbon Country Distilleries Visited

Louisville visitors were asked how many Bourbon Country distilleries they visited or planned to visit during their trip. On average, survey respondents visited 0.7 distilleries during their visit to Louisville. **For respondents who reported visiting at least one distillery during their trip, the average number of distilleries visited was 2.6.**

Chart 15: Bourbon Country Distilleries Visited



Base: All respondents. 1,942 completed surveys

Detail by Type of Visitor

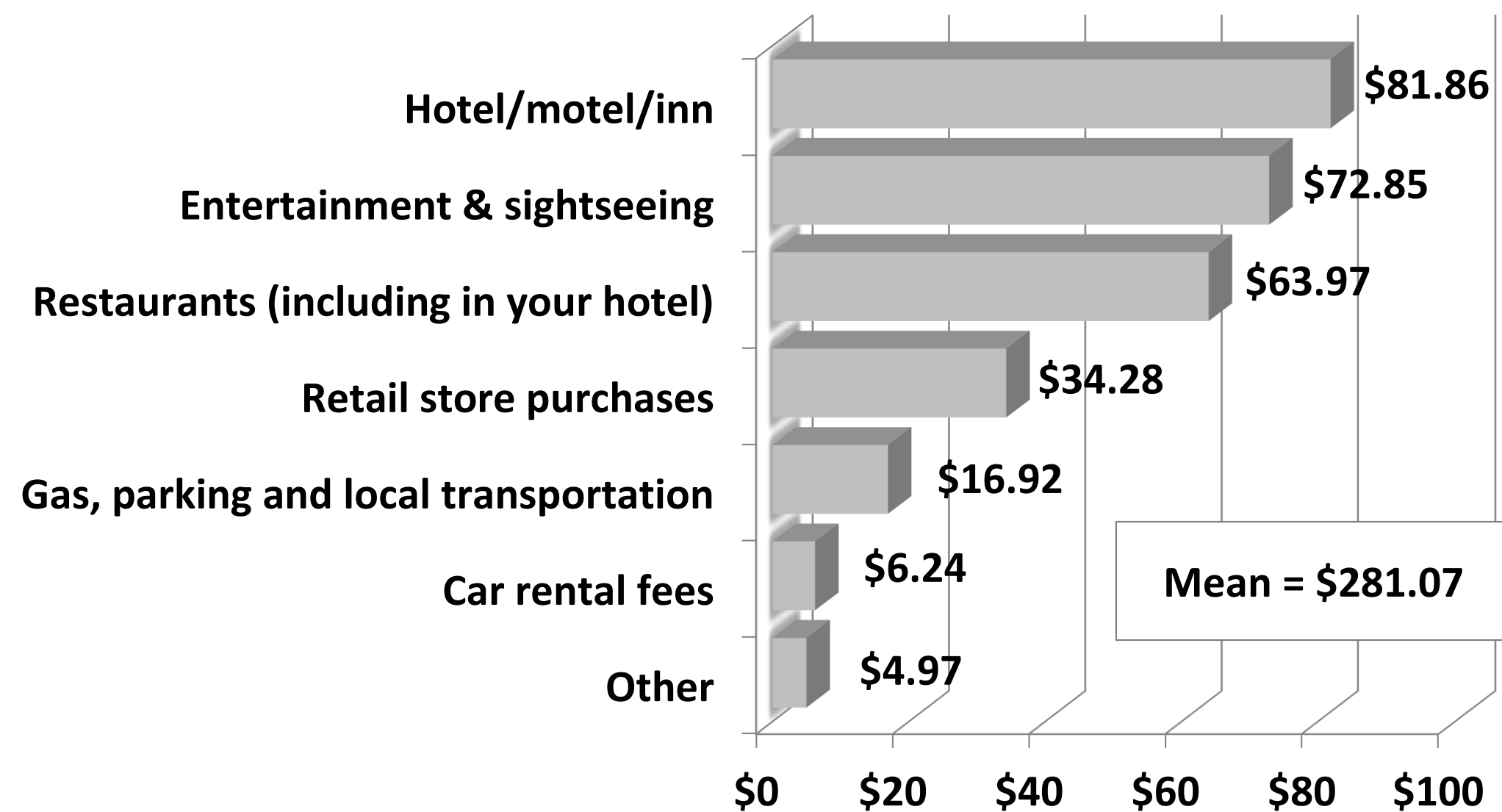
	Hotel	VFR	Day Trip
5 or more	2.5%	1.7%	2.8%
4	1.1%	0.0%	1.3%
3	2.9%	2.3%	1.9%
2	6.6%	7.4%	4.9%
1	23.4%	16.0%	10.6%
0	63.5%	72.0%	78.6%
Mean	0.7	0.5	0.5
Mean number of distilleries visited for those who visited at least 1 distillery	1.9	1.8	2.5
Sample Size	1087	175	616

Question: How many Bourbon Country distilleries did you (or will you) visit during your stay?

Spending Per Day, Per Travel Party

Visiting travel parties to Louisville spent an average of **\$281.07 per trip day in the city**. The bulk of this spending is attributed to accommodations (\$81.86) and entertainment and sightseeing (\$72.85). Other top expenditures include restaurants (\$63.97) and retail store purchases (\$34.28). Hotel guests alone spent an average of \$163.70 for their accommodations.

Chart 16: Spending Per Day



Base: All respondents. 2,281 completed surveys

Detail by Type of Visitor

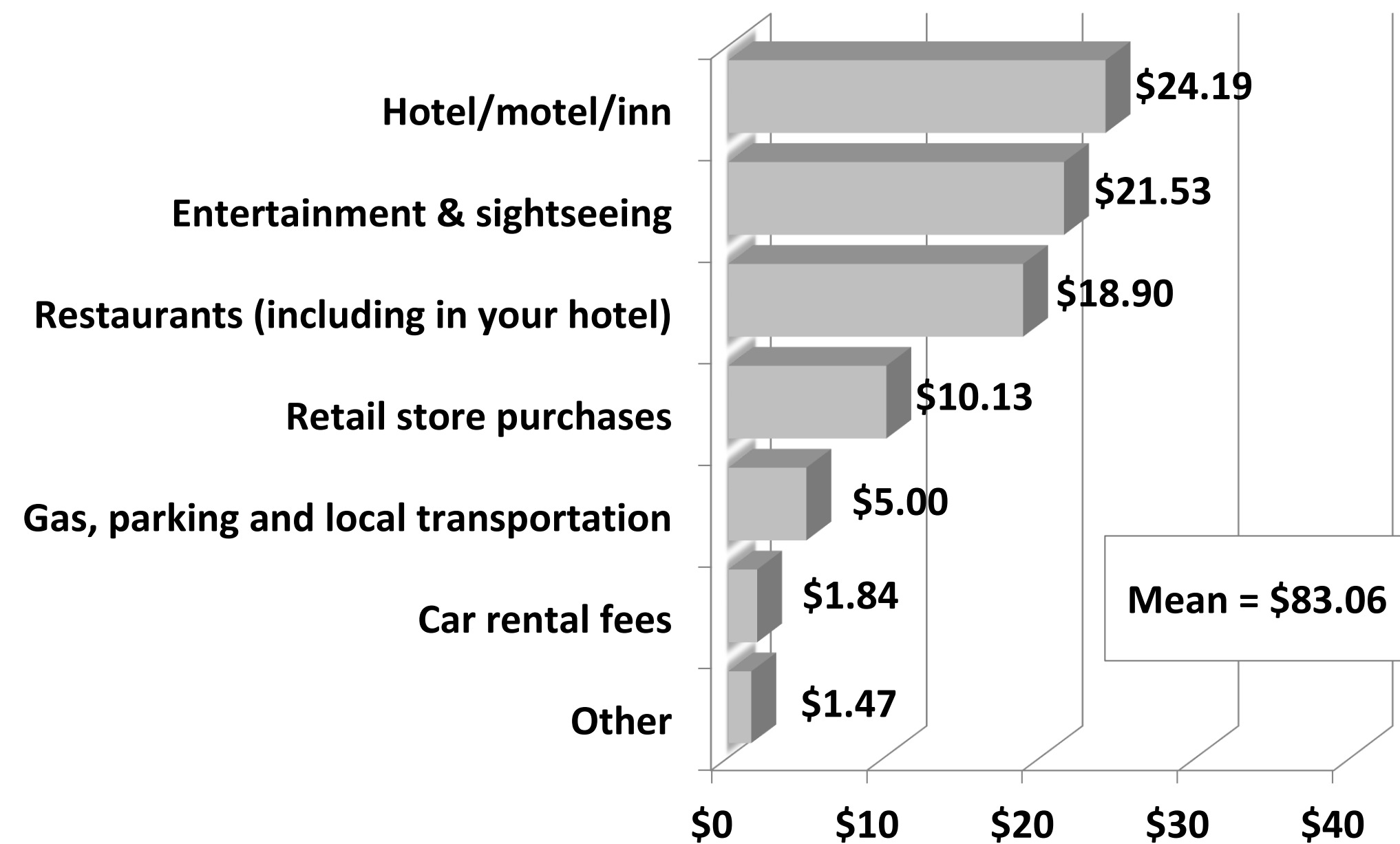
	Hotel	VFR	Day Trip
Hotel/motel/inn	\$163.70	\$9.27	--
Entertainment & sightseeing	\$54.55	\$56.08	\$75.60
Restaurants (including in your hotel)	\$90.03	\$63.31	\$54.70
Retail store purchases	\$40.74	\$56.73	\$29.58
Gas, parking and local transportation	\$18.86	\$16.43	\$17.15
Car rental fees	\$11.13	\$5.23	\$4.47
Other	\$3.85	\$1.37	\$5.86
Mean	\$382.86	\$208.42	\$187.36
Sample Size	1217	194	802

Question: PER DAY, approximately how much will you spend on each of the following while in Louisville?

Spending Per Day, Per Person

The reported daily spending of \$281.07 covered an average of 3.4 travelers. **Thus, it is estimated that the average Louisville visitor represents \$83.06 in daily in-market spending.** Hotel guests represent the highest average daily per person in-market spending at \$162.68.

Chart 17: Spending Per Day, Per Person



Base: All respondents. 2,281 completed surveys

Detail by Type of Visitor

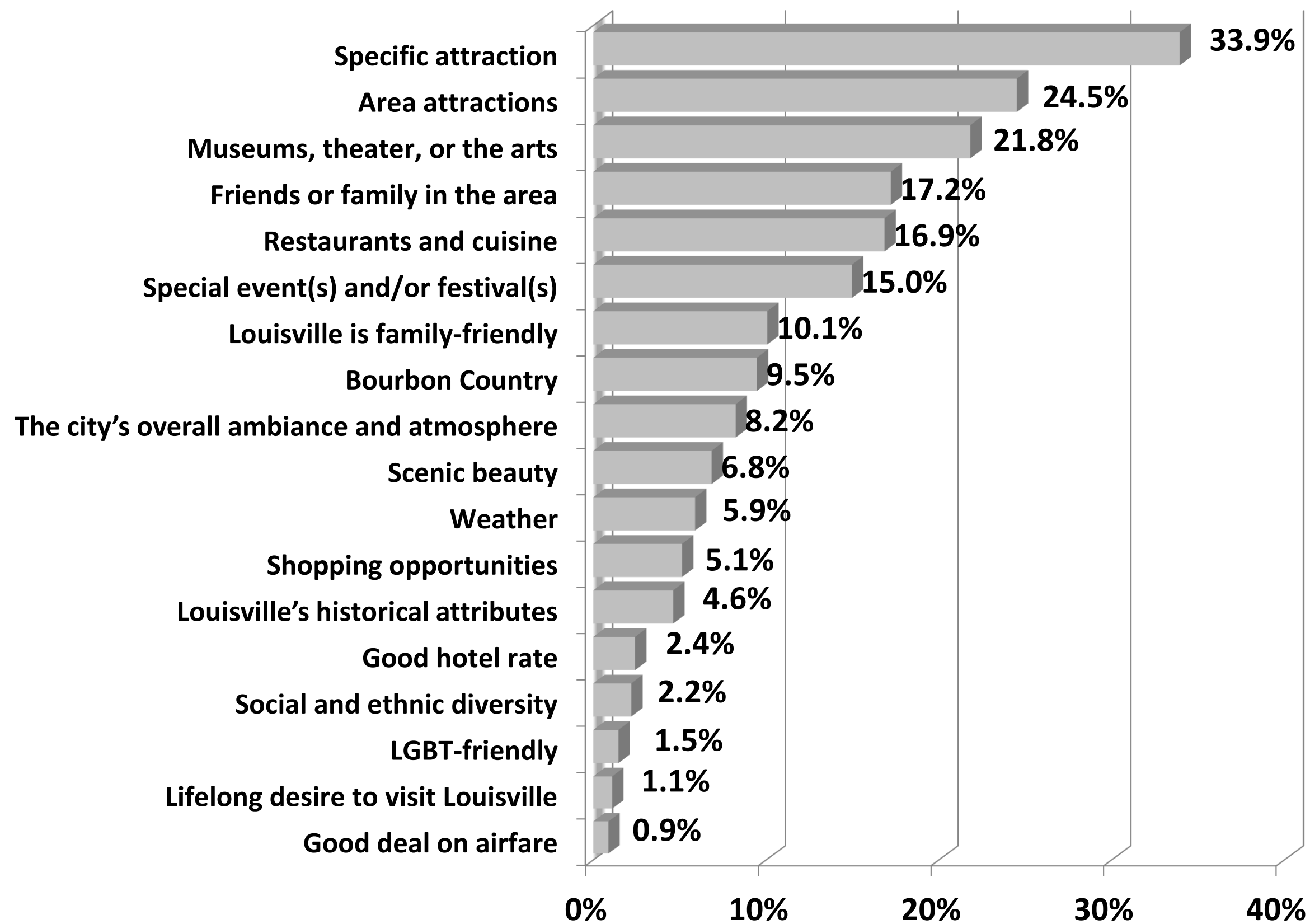
	Hotel	VFR	Day Trip
Hotel/motel/inn	\$69.56	\$3.75	--
Restaurants (including in your hotel)	\$23.18	\$22.67	\$19.13
Entertainment & sightseeing	\$38.25	\$25.59	\$13.84
Retail store purchases	\$17.31	\$22.93	\$7.48
Gas, parking and local transportation	\$8.01	\$6.64	\$4.34
Car rental fees	\$4.73	\$2.12	\$1.13
Other	\$1.64	\$0.55	\$1.48
Mean Number of People Covered by Spending	2.4	2.5	4.0
Mean Spending Per Person Per Day	\$162.68	\$84.24	\$47.40
Sample Size	1208	194	797

Question: These expenses fully covered how many people (including yourself)?

Important Factors to Destination Decision

Attractions, the museums and art scene, friends or family in the area and the restaurants and culinary scene are driving visitors to Louisville. These factors were most commonly cited by visitors as being important to their ultimate decision to visit the city.

Chart 18: Important Factors to Destination Decision



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

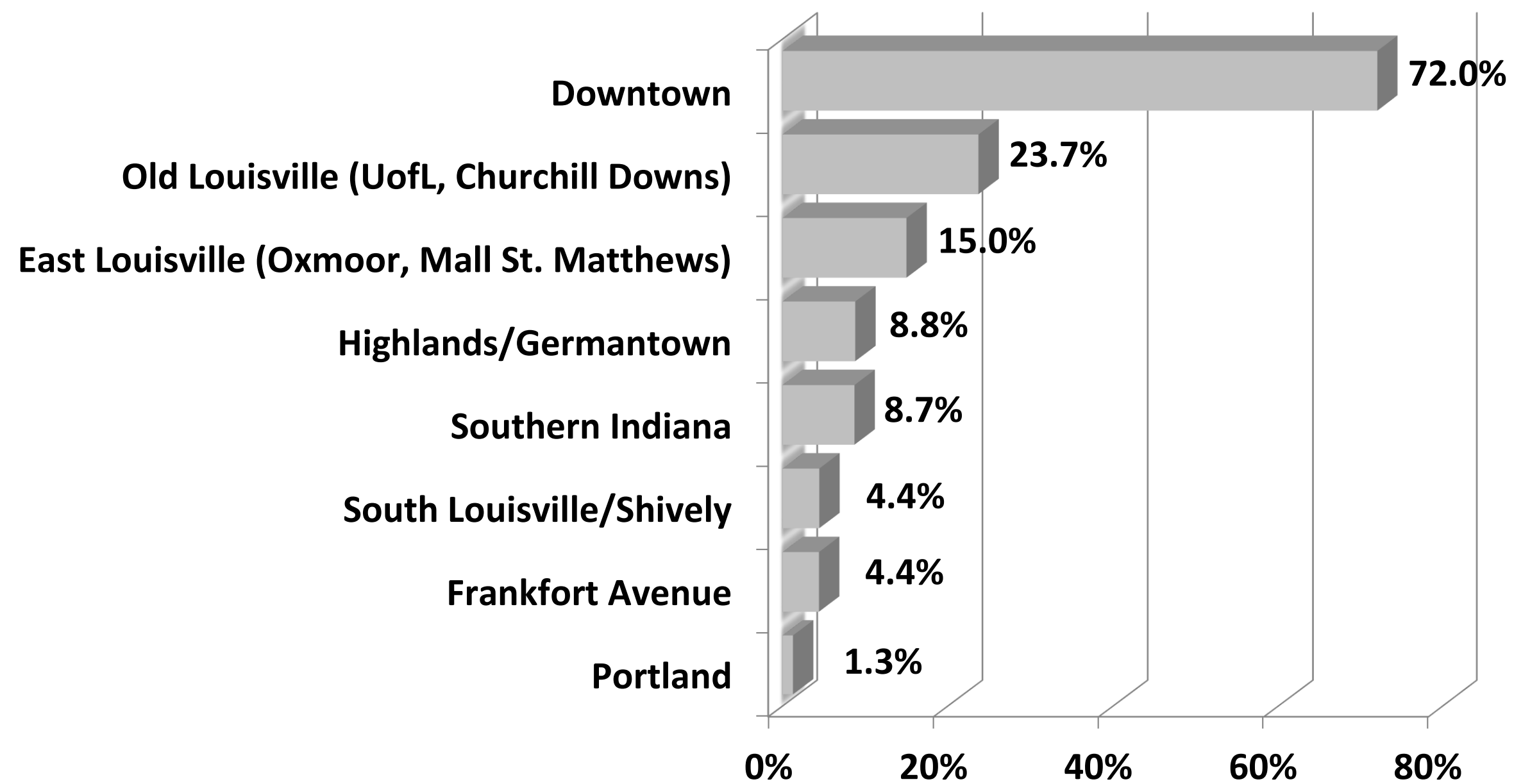
	Hotel	VFR	Day Trip
Specific attraction	33.0%	19.7%	36.3%
Area attractions	21.2%	17.8%	27.5%
Museums, theater, or the arts	17.3%	20.7%	24.9%
Friends or family in the area	10.3%	64.4%	13.2%
Restaurants and cuisine	22.7%	15.9%	14.9%
Special event(s) and/or festival(s)	30.9%	17.3%	10.0%
Louisville is family-friendly	6.9%	17.3%	10.9%
Bourbon Country	12.2%	4.8%	6.9%
The city's overall ambiance and atmosphere	12.6%	7.7%	6.8%
Scenic beauty	7.9%	5.3%	6.4%
Weather	6.8%	6.7%	6.0%
Shopping opportunities	5.9%	5.8%	4.5%
Louisville's historical attributes	7.6%	5.3%	3.3%
Good hotel rate	6.7%	0.0%	1.5%
Social and ethnic diversity	2.5%	2.4%	1.2%
LGBT-friendly	0.9%	2.4%	1.2%
Lifelong desire to visit Louisville	1.8%	0.5%	0.8%
Good deal on airfare	1.6%	1.0%	0.7%
Sample Size	1298	208	884

Question: Which of the following were IMPORTANT to your decision to take this trip to Louisville? (Select all that apply)

Neighborhoods Visited

The most frequently visited neighborhoods by visitors were the Downtown area (72.0%), Old Louisville (23.7%) and East Louisville (15.0%). This was followed by Highlands/Germantown (8.8%) and Southern Indiana (8.7%).

Chart 19: Neighborhoods Visited



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

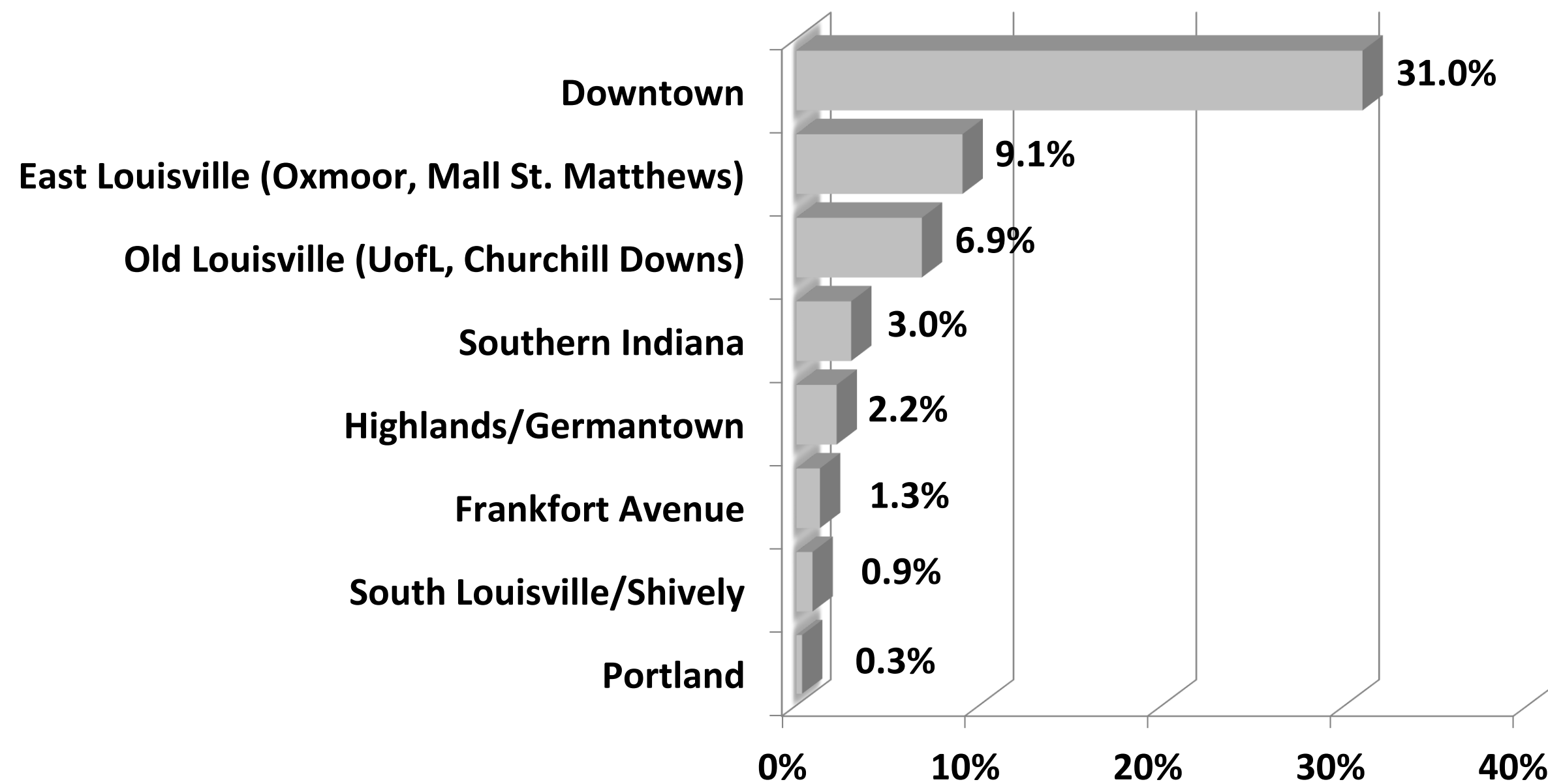
	Hotel	VFR	Day Trip
Downtown	87.3%	88.0%	63.3%
Old Louisville (UofL, Churchill Downs)	30.8%	40.9%	19.1%
East Louisville (Oxmoor, Mall St. Matthews)	15.3%	39.4%	12.3%
Highlands/Germantown	9.1%	21.2%	7.0%
Southern Indiana	6.6%	12.0%	9.6%
South Louisville/Shively	4.6%	12.5%	3.1%
Frankfort Avenue	5.7%	12.5%	3.3%
Portland	1.2%	1.0%	1.2%
Mean number of neighborhoods visited	1.6	2.3	1.2
Sample Size	1298	208	884

Question: During your stay in Louisville, did you (or will you) visit, shop or dine in any of these Louisville neighborhoods? (Select each appropriate option below)

Neighborhoods Shopped

Shopping in Downtown Louisville was popular among 31.0 percent of visitors surveyed. This is followed by East Louisville (9.1%) and Old Louisville (6.9%).

Chart 20: Neighborhoods Shopped



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

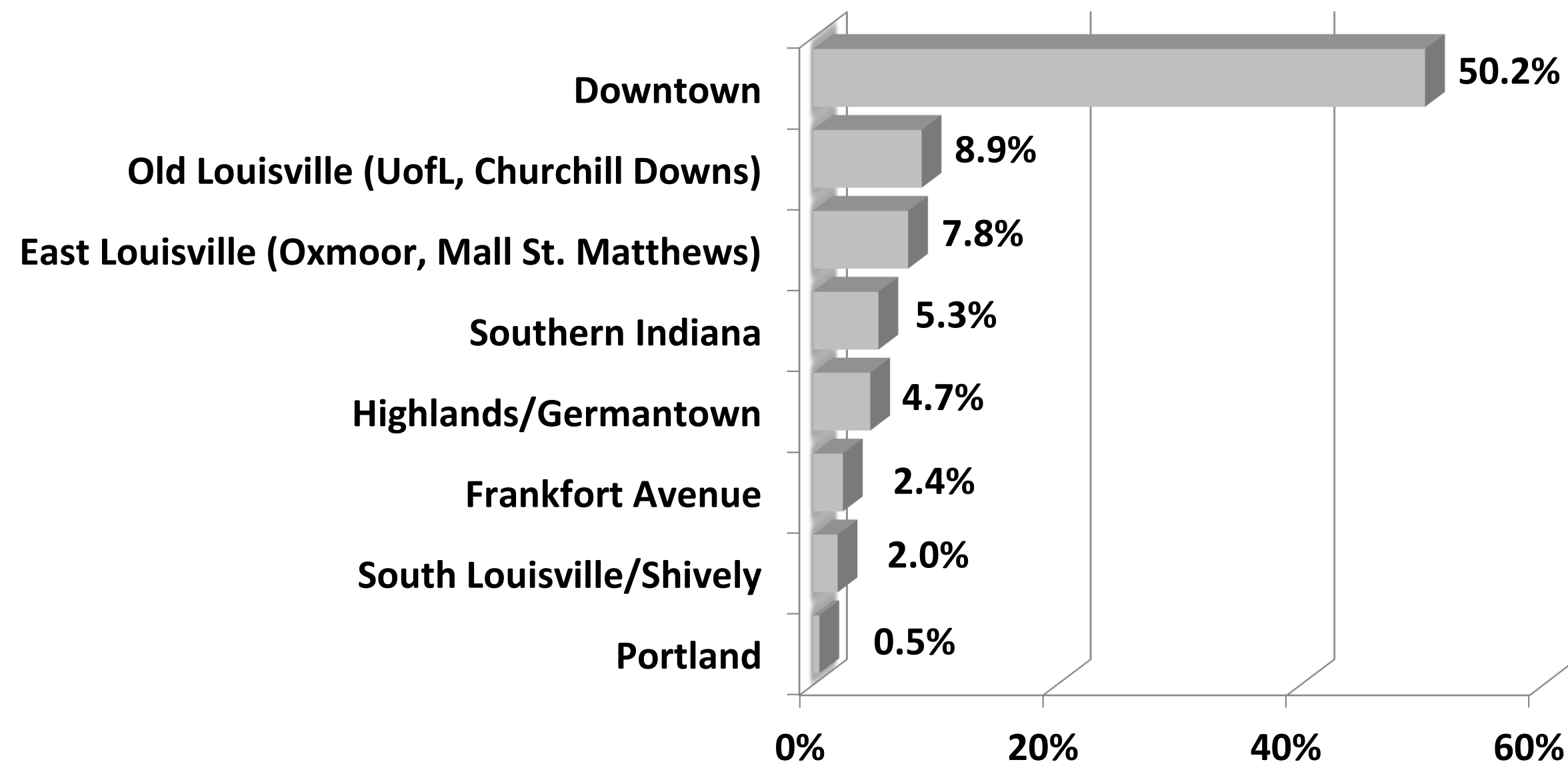
	Hotel	VFR	Day Trip
Downtown	47.3%	36.5%	22.7%
East Louisville (Oxmoor, Mall St. Matthews)	9.0%	25.0%	7.9%
Old Louisville (UofL, Churchill Downs)	8.2%	13.0%	6.1%
Southern Indiana	1.5%	2.4%	4.1%
Highlands/Germantown	2.6%	6.7%	2.0%
Frankfort Avenue	1.2%	4.3%	1.0%
South Louisville/Shively	1.3%	3.4%	0.6%
Portland	0.2%	0.0%	0.2%
Sample Size	1298	208	884

Question: During your stay in Louisville, did you (or will you) visit, shop or dine in any of these Louisville neighborhoods? (Select each appropriate option below)

Neighborhoods Dined

Downtown Louisville also draws the majority of visitors to the area for dining at 50.2 percent. Other popular neighborhoods were Old Louisville (8.9%) and East Louisville (7.8%).

Chart 21: Neighborhoods Dined



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Downtown	71.7%	60.1%	40.3%
Old Louisville (UofL, Churchill Downs)	12.2%	14.4%	7.4%
East Louisville (Oxmoor, Mall St. Matthews)	8.7%	19.2%	6.2%
Southern Indiana	4.0%	6.3%	6.1%
Highlands/Germantown	5.5%	11.1%	3.7%
Frankfort Avenue	2.3%	6.7%	1.9%
South Louisville/Shively	1.8%	7.2%	1.5%
Portland	0.3%	0.0%	0.5%
Sample Size	1298	208	884

Question: During your stay in Louisville, did you (or will you) visit, shop or dine in any of these Louisville neighborhoods? (Select each appropriate option below)

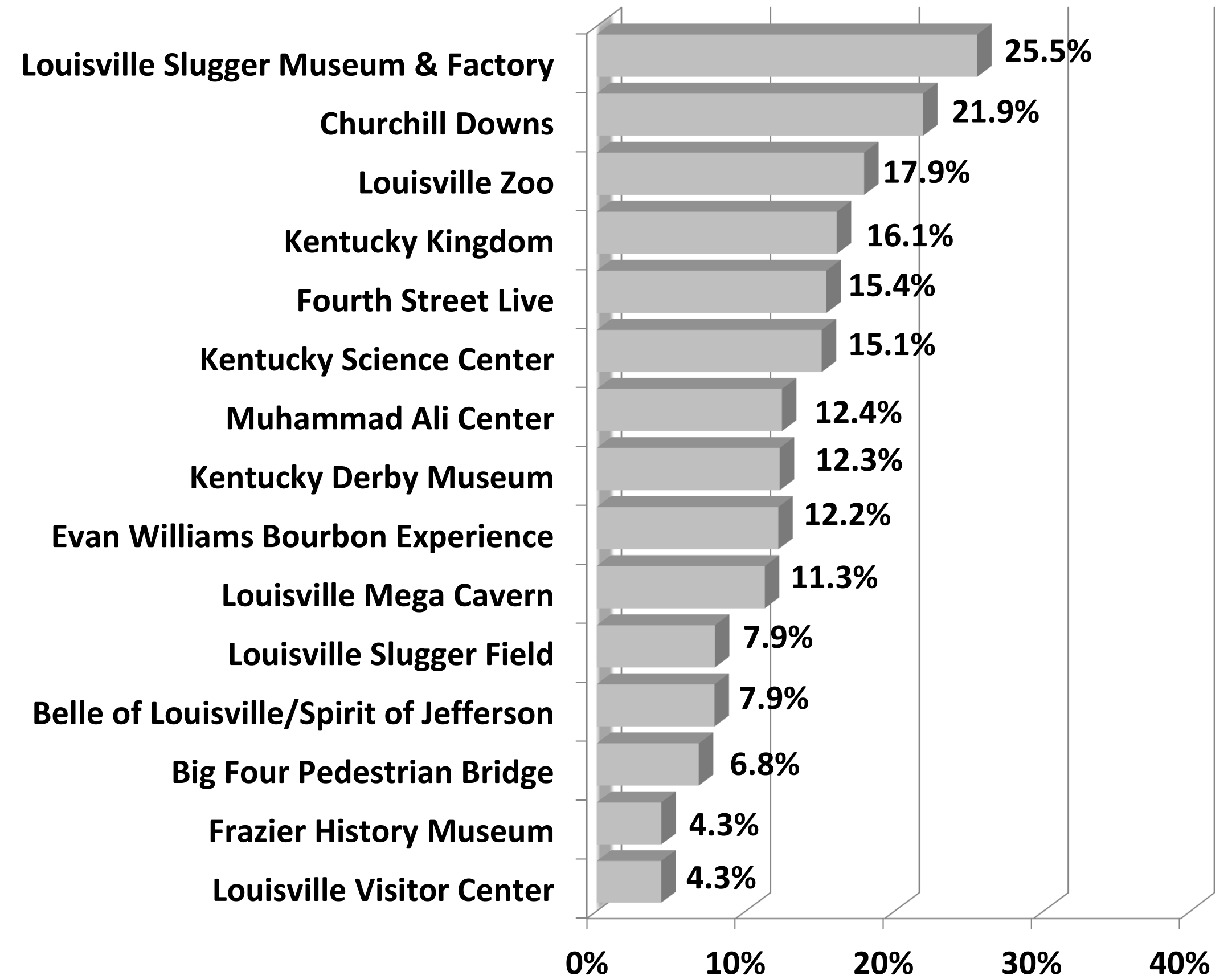
Attractions Visited

Louisville visitors patronize a wide array of Louisville attractions while they're in the destination. Presented with a list of 23 Louisville attractions, respondents were asked to identify the attractions they have or will visit during their trip. The chart to the right illustrates the top fifteen attractions visited. The most frequented Louisville attractions were the Louisville Slugger Museum (25.5%), Churchill Downs (21.9%), the Louisville Zoo (17.9%) and Kentucky Kingdom (16.1%). Nine-in-ten visitors went to at least one of the attractions tested, averaging 2.1 attractions during their trip.

(Complete data for all attractions is presented on the next slide.)

Question: Which of the following attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All respondents. 2,486 completed surveys

Chart 22: Attractions Visited



Attractions Visited – Complete Detail

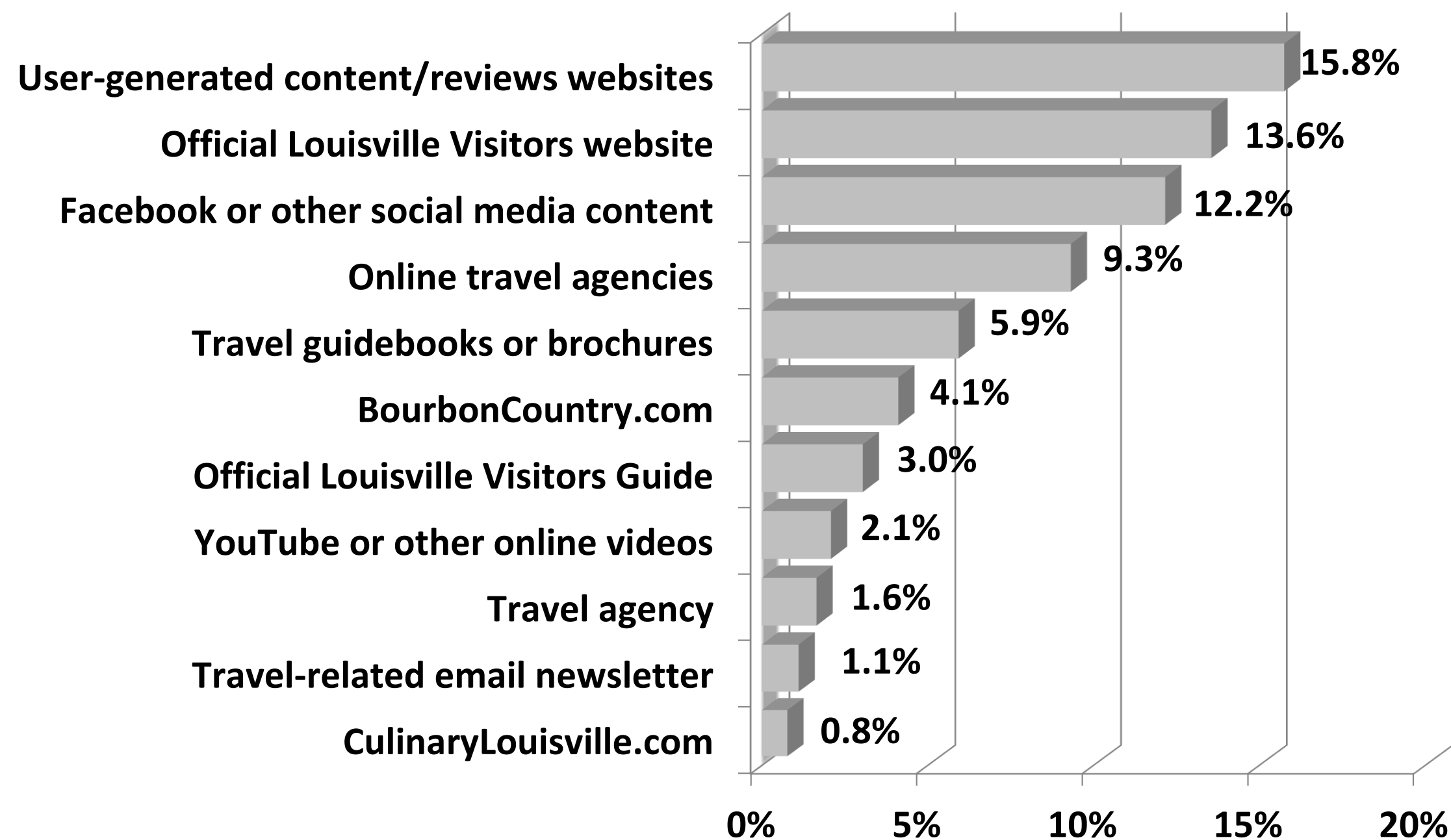
Detail by Type of Visitor

	Total Answering	Hotel	VFR	Day Trip
Louisville Slugger Museum & Factory	25.5%	37.5%	26.0%	19.5%
Churchill Downs	21.9%	32.8%	27.4%	16.4%
Louisville Zoo	17.9%	8.9%	25.0%	20.7%
Kentucky Kingdom	16.1%	10.3%	12.0%	19.0%
Fourth Street Live	15.4%	27.4%	20.7%	10.1%
Kentucky Science Center	15.1%	8.6%	20.7%	16.7%
Muhammad Ali Center	12.4%	18.5%	17.3%	9.8%
Kentucky Derby Museum	12.3%	16.0%	15.4%	10.7%
Evan Williams Bourbon Experience	12.2%	17.9%	12.5%	8.0%
Louisville Mega Cavern	11.3%	10.8%	13.5%	11.8%
Louisville Slugger Field	7.9%	11.2%	10.6%	5.9%
Belle of Louisville/Spirit of Jefferson	7.9%	7.4%	11.1%	7.9%
Big Four Pedestrian Bridge	6.8%	7.4%	17.3%	5.5%
Frazier History Museum	4.3%	4.3%	6.7%	3.7%
Louisville Visitor Center	4.3%	9.6%	1.9%	1.9%
Outlet Shoppes of the Bluegrass	3.4%	4.3%	7.7%	2.9%
Louisville Glassworks	2.5%	3.7%	1.9%	1.7%
The Kentucky Center for the Performing Arts	2.3%	1.8%	1.9%	2.0%
Speed Art Museum	1.7%	1.8%	3.4%	1.8%
Kentucky Museum of Art & Craft	1.5%	1.9%	1.0%	1.5%
Actors Theatre of Louisville	1.3%	1.2%	0.0%	1.1%
Louisville Stoneware	0.9%	1.1%	1.4%	0.8%
American Printing House for the Blind	0.3%	0.4%	0.5%	0.3%
Mean number of attractions visited	2.1	2.5	2.6	1.8
Sample Size	2486	1298	208	884

Planning Resources Used Before Arrival

Review websites, the official Louisville Visitors website and social media content are resources Louisville visitors frequently turn to for planning their visit to the city. Before arriving in Louisville, 15.8 percent of visitors used user generated content/review websites to plan their trip. This was followed by the official Louisville visitors website (13.6%), Facebook, Twitter or other social media content (12.2) and online travel agencies (9.3%).

Chart 23: Resources Used Before Arrival



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

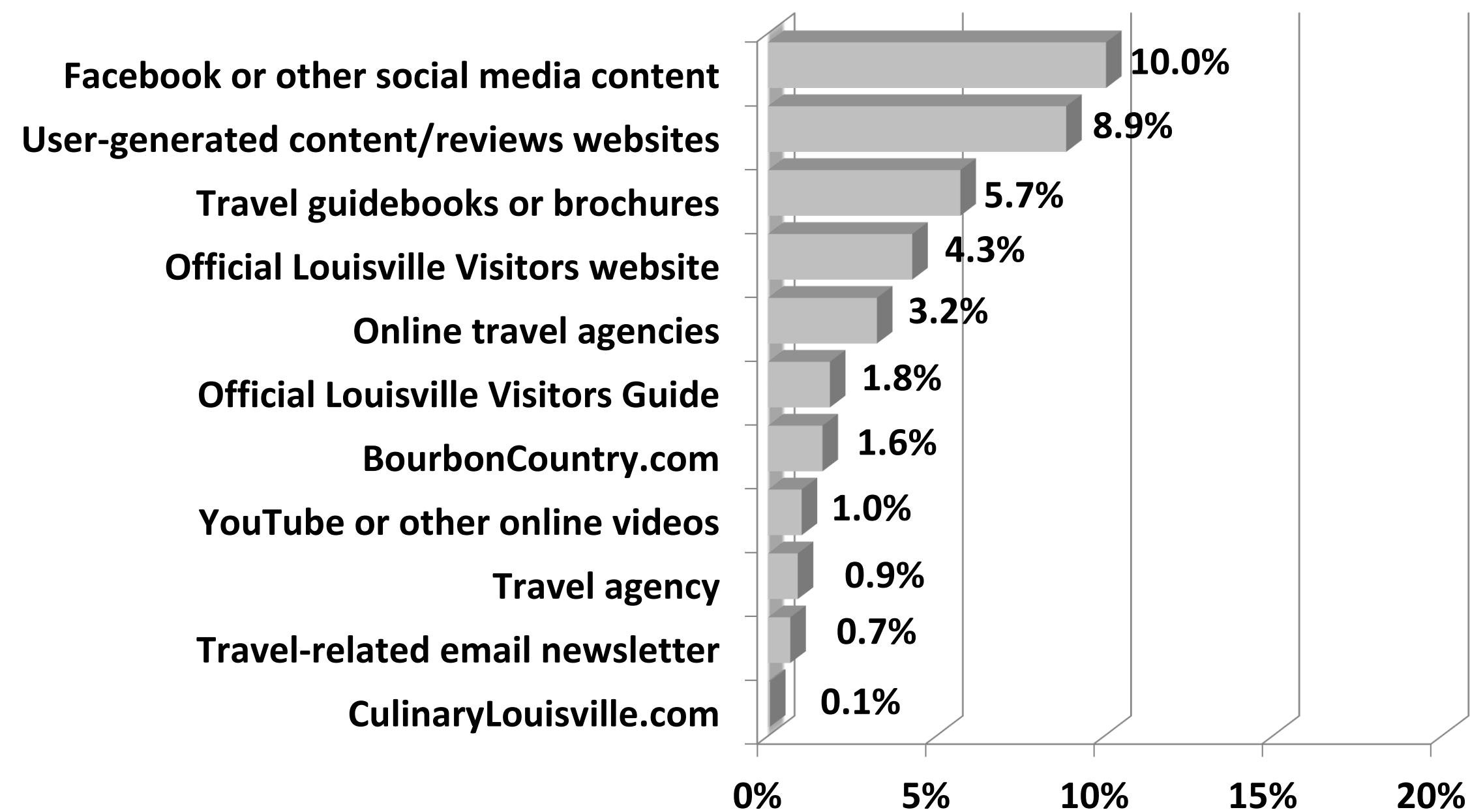
	Hotel	VFR	Day Trip
User-generated content/reviews websites	20.4%	10.6%	14.4%
Official Louisville Visitors website	19.7%	13.0%	10.9%
Facebook, Twitter, Instagram or other social media content	15.4%	9.6%	11.4%
Online travel agencies	15.2%	5.3%	7.9%
Travel guidebooks or brochures	7.8%	2.9%	5.5%
BourbonCountry.com	6.0%	1.9%	2.5%
Official Louisville Visitors Guide	5.2%	2.9%	2.4%
YouTube or other online videos	2.5%	1.0%	2.0%
Travel agency	3.7%	0.0%	1.2%
Travel-related email newsletter	1.2%	0.5%	1.0%
CulinaryLouisville.com	1.0%	0.5%	0.6%
Sample Size	1298	208	884

Question: Which of the following resources did you use to plan your Louisville trip before arriving and which did you (or will you) use while in the city? (Select all that apply)

Planning Resources Used In-Market

Of the resources tested, social media and review websites are most likely to be turned to for trip planning during the Louisville visit. While in Louisville, approximately one-in-ten respondents gathered trip planning information from Facebook or other social media content (10.0%) and/or user review websites (8.9%). 5.7 percent used travel guidebooks or brochures to help plan their trip while in the destination.

Chart 24: Resources Used In-Market



Base: All respondents. 2,486 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Facebook, Twitter, Instagram or other social media content	12.5%	6.3%	8.9%
User-generated content/reviews websites	12.4%	6.7%	6.9%
Travel guidebooks or brochures	8.7%	4.8%	4.9%
Official Louisville Visitors website	6.9%	6.7%	2.7%
Online travel agencies	5.3%	1.9%	2.0%
Official Louisville Visitors Guide	3.6%	1.9%	1.1%
BourbonCountry.com	2.0%	0.0%	0.9%
YouTube or other online videos	1.1%	0.5%	1.1%
Travel agency	1.9%	0.0%	0.5%
Travel-related email newsletter	0.5%	0.5%	0.6%
CulinaryLouisville.com	0.2%	0.0%	0.0%
Sample Size	1298	208	884

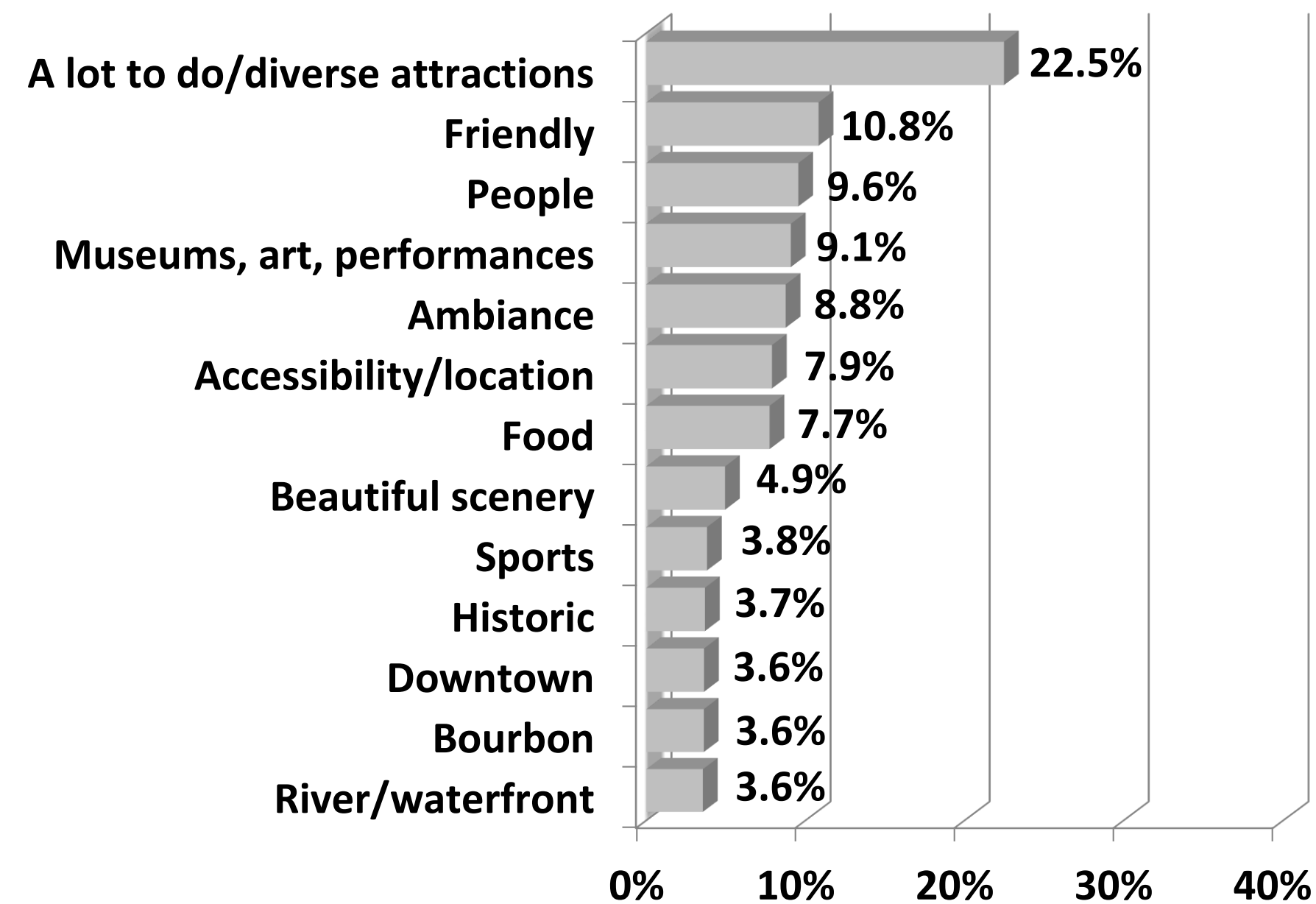
Question: Which of the following resources did you use to plan your Louisville trip before arriving and which did you (or will you) use while in the city? (Select all that apply)

Most Liked Aspects of Louisville

Visitors most value Louisville’s diverse attractions and offerings of things to do (22.5%), friendly atmosphere (10.8%) and wonderful people (9.6%).

These were the top responses to an open-ended question posed to visitors about what they liked most about Louisville. These destination attributes are well complemented by the city’s museums and arts (9.1%), its overall ambiance (8.8%) and accessibility (7.9%) in the minds of visitors.

Chart 25: Most Liked Aspects of Louisville



Base: All respondents. 2,234 completed surveys

Detail by Type of Visitor

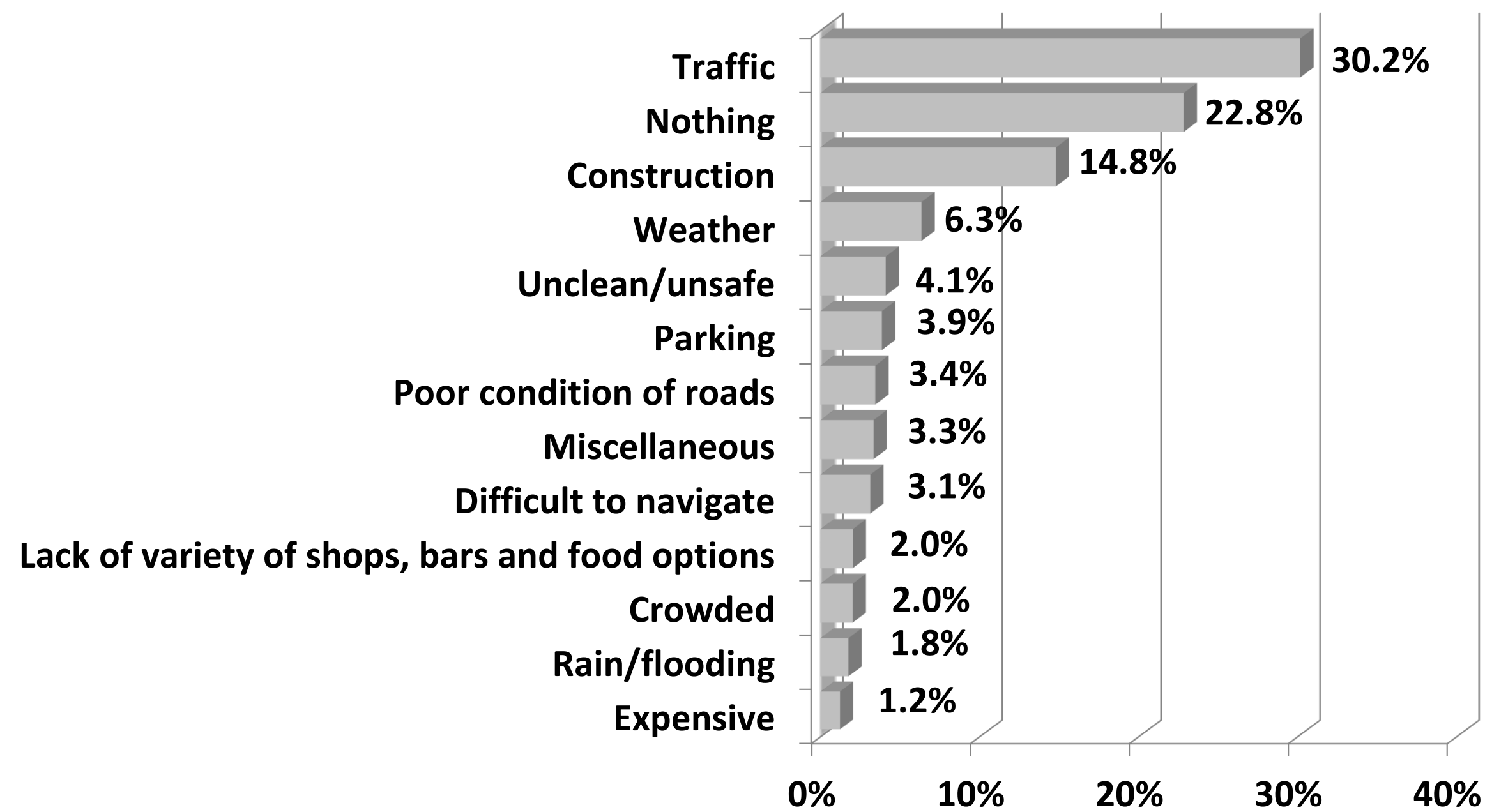
	Hotel	VFR	Day Trip
A lot to do/diverse attractions	13.5%	16.0%	27.9%
Friendly	18.0%	9.0%	8.5%
People	8.2%	28.0%	8.6%
Museums, art, performances	6.6%	5.5%	10.7%
Ambiance	8.5%	7.5%	8.6%
Accessibility/location	7.8%	3.5%	8.8%
Food	9.7%	9.5%	6.5%
Beautiful scenery	5.7%	8.5%	3.7%
Sports	4.0%	4.0%	3.7%
Historic	4.9%	2.5%	3.5%
Downtown	6.0%	3.5%	2.6%
Bourbon	3.9%	2.5%	2.9%
River/waterfront	3.4%	3.5%	3.7%
Sample Size	1160	200	803

Question: What do you like most about Louisville?

Least Liked Aspects of Louisville

When asked what was liked least about Louisville, 22.8 percent of respondents said there was “nothing” they disliked about the destination. Of the specific responses provided, traffic (30.2%) and construction (14.8%) were cited as the least liked aspects of Louisville.

Chart 26: Least Liked Aspects of Louisville



Base: All respondents. 1,938 completed surveys

Detail by Type of Visitor

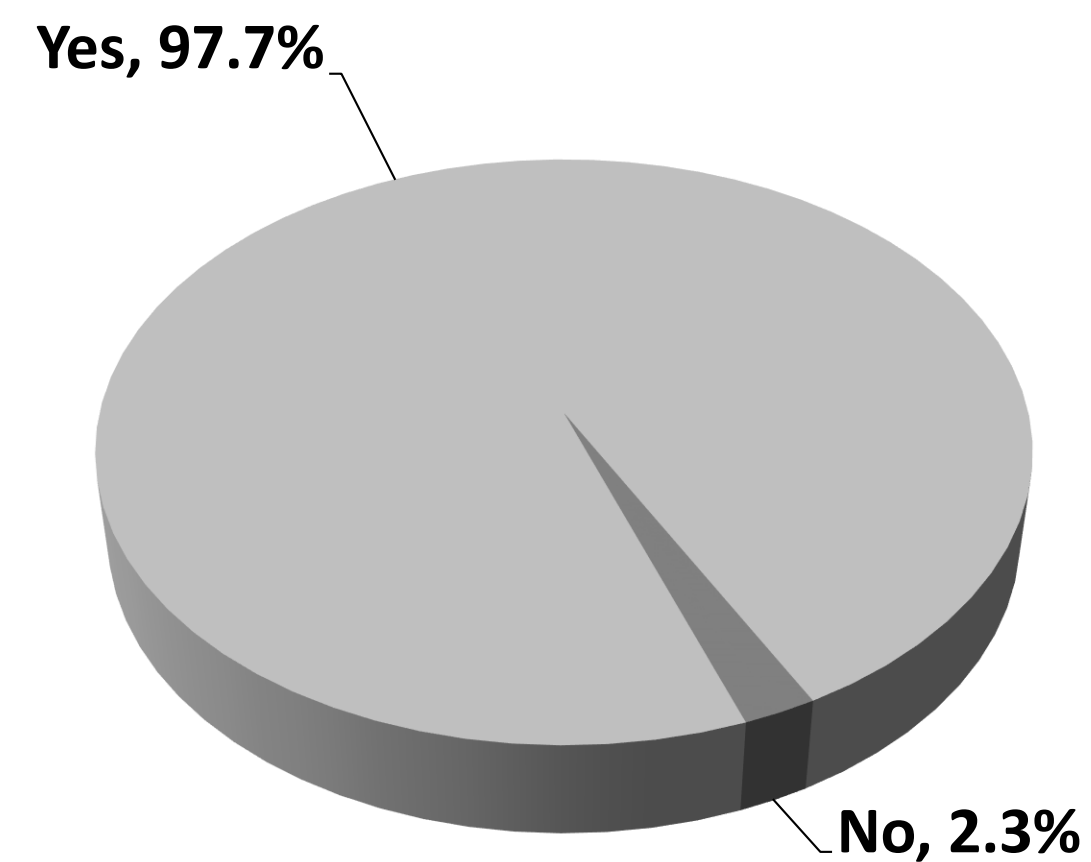
	Hotel	VFR	Day Trip
Traffic	16.5%	24.1%	37.2%
Nothing	29.7%	28.9%	20.5%
Construction	16.2%	12.7%	14.5%
Weather	9.9%	9.6%	4.6%
Unclean/unsafe	3.8%	1.8%	3.6%
Parking	2.6%	1.2%	4.7%
Poor condition of roads	3.0%	5.4%	3.2%
Difficult to navigate	3.1%	1.8%	2.9%
Lack of variety of shops, bars and food options	3.4%	4.2%	1.3%
Crowded	0.9%	3.0%	2.2%
Rain/flooding	1.7%	1.8%	2.0%
Expensive	1.5%	1.2%	1.3%
People	0.9%	1.8%	1.0%
Sample Size	978	166	716

Question: What do you like least about Louisville?

Return to Louisville

Louisville appears to provide a highly satisfactory experience to its visitors. Nearly all visitors surveyed report that they would indeed return to Louisville (97.7%).

Chart 27: Return to Louisville



Base: All respondents. 2,355 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Yes	97.6%	99.0%	98.3%
No	2.4%	1.0%	1.7%
Sample Size	1233	199	841

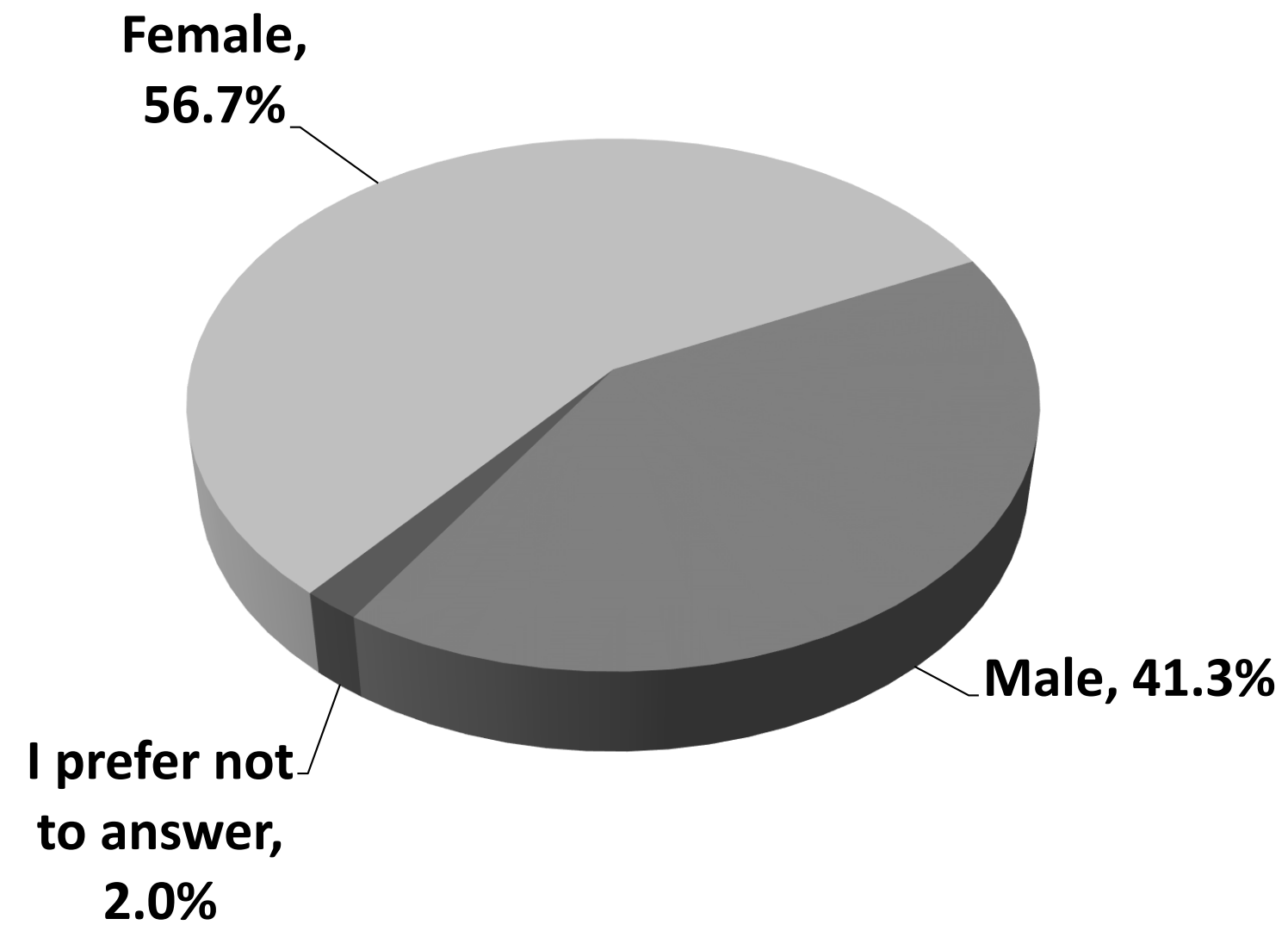
Question: Would you return to Louisville?

Demographics

Gender

There is nearly an even gender split between survey respondents.

Chart 28: Gender



Base: All respondents. 2,420 completed surveys

Detail by Type of Visitor

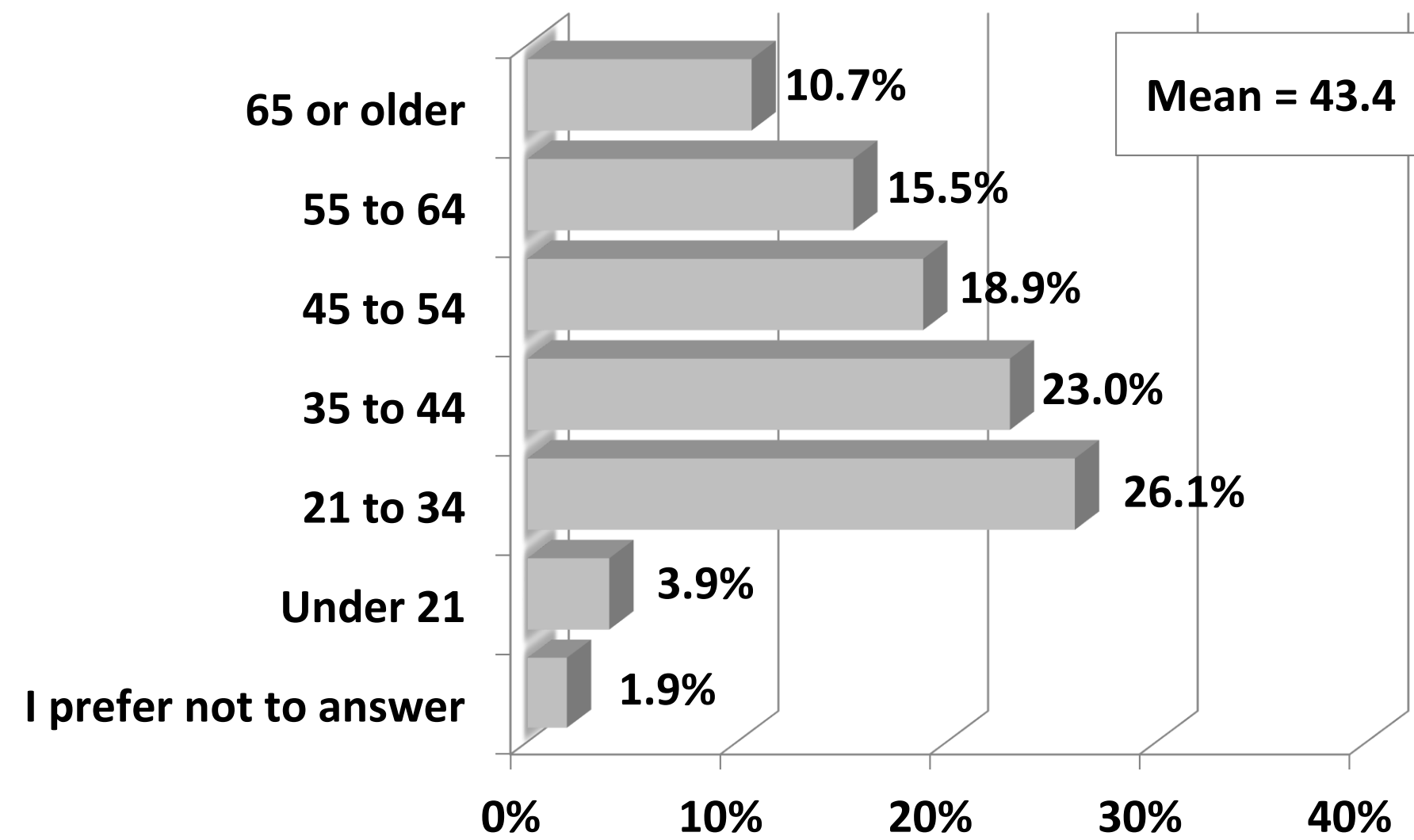
	Hotel	VFR	Day Trip
Female	52.5%	62.7%	57.8%
Male	45.2%	34.3%	40.4%
I prefer not to answer	2.2%	2.9%	1.7%
Sample Size	1260	204	868

Question: What is your gender?

Age

The average age of surveyed visitors was 43.4 years.

Chart 29: Age



Base: All respondents. 2,422 completed surveys

Detail by Type of Visitor

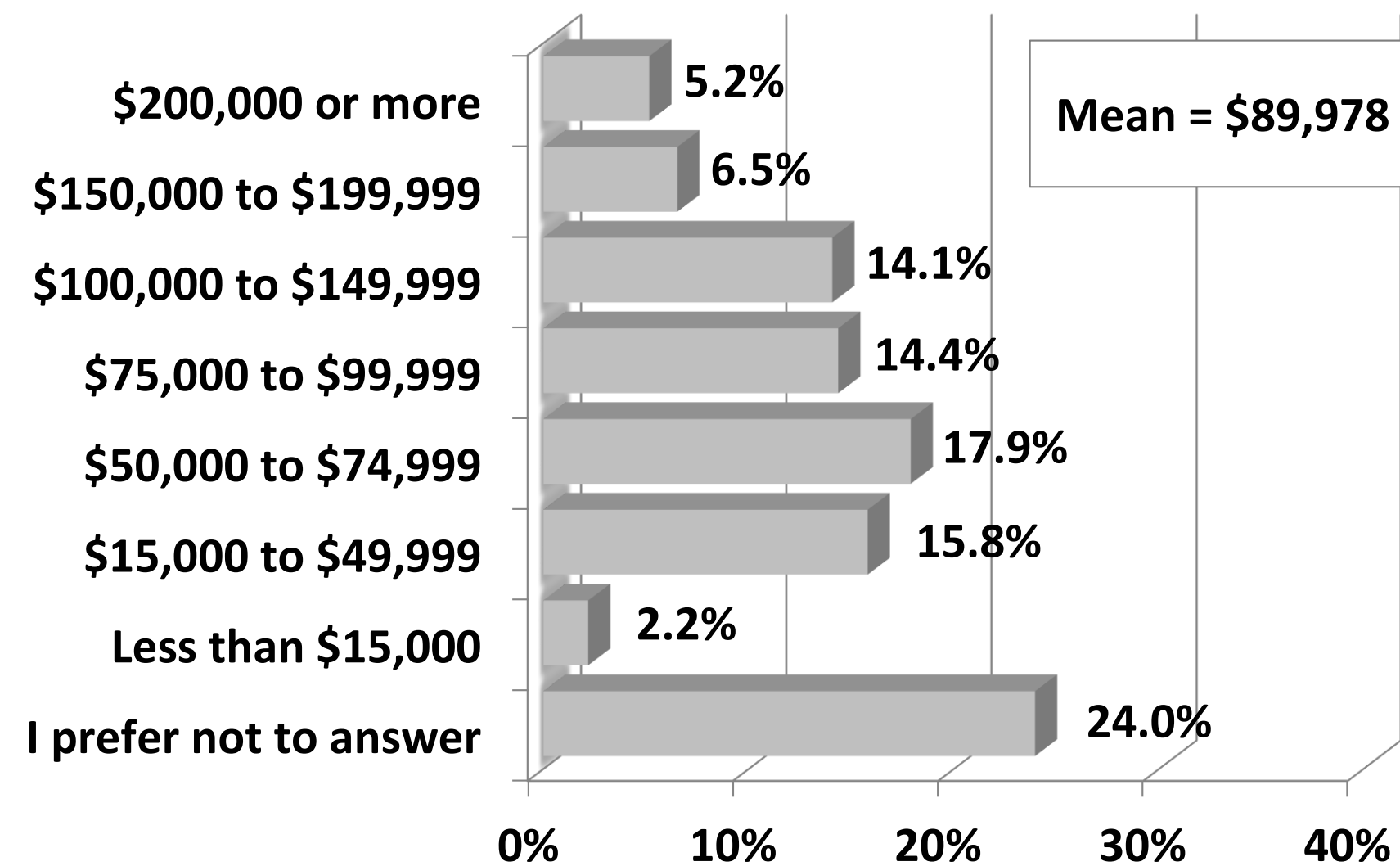
	Hotel	VFR	Day Trip
Under 21	4.6%	5.4%	3.7%
21 to 34	19.5%	30.2%	27.9%
35 to 44	20.5%	22.0%	24.5%
45 to 54	22.8%	16.6%	18.8%
55 to 64	19.4%	12.7%	12.4%
65 or older	10.7%	10.7%	10.9%
I prefer not to answer	2.4%	2.4%	1.8%
Mean	45.3	41.8	42.6
Sample Size	1256	205	871

Question: Which is your age?

Annual Household Income

Louisville visitors surveyed have an average annual household income of \$89,978. Hotel guests report a much higher household income than VFR or day-trip visitors.

Chart 30: Annual Household Income



Base: All respondents. 2,408 completed surveys

Detail by Type of Visitor

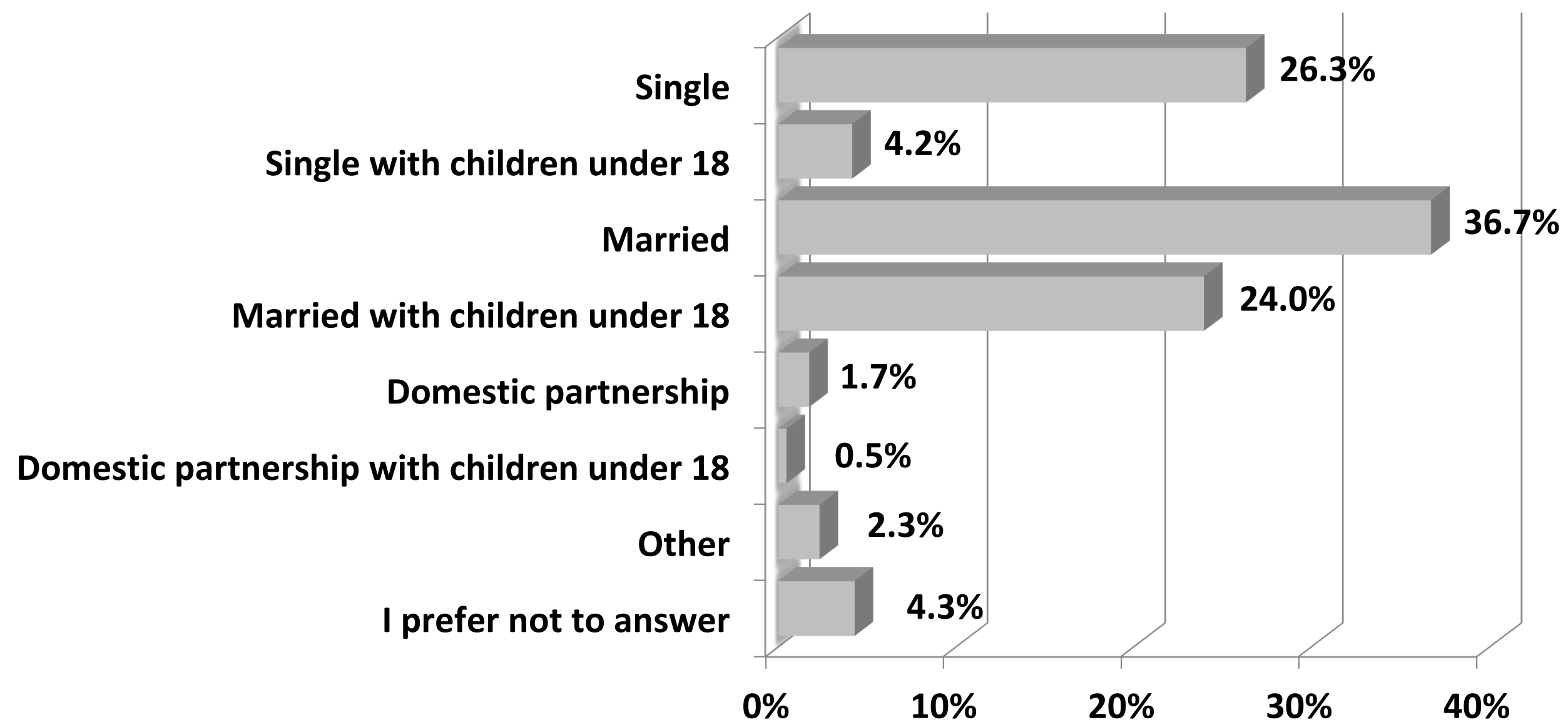
	Hotel	VFR	Day Trip
Less than \$15,000	2.0%	5.9%	2.2%
\$15,000 to \$49,999	8.5%	16.3%	17.8%
\$50,000 to \$74,999	15.7%	17.2%	20.3%
\$75,000 to \$99,999	15.3%	15.8%	14.2%
\$100,000 to \$149,999	16.5%	11.8%	13.4%
\$150,000 to \$199,999	8.1%	5.9%	5.5%
\$200,000 or more	10.4%	3.9%	3.8%
I prefer not to answer	23.5%	23.2%	22.9%
Mean	\$106,779	\$82,371	\$84,228
Sample Size	1253	203	861

Question: Which of the following best describes the combined annual income of all members of your household?

Marital Status

Two-thirds of Louisville visitors surveyed are married (60.7%) or in a domestic partnership (2.2%), while 30.5 percent are single. 28.6 percent have children under age 18.

Chart 31: Marital Status



Base: All respondents. 2,399 completed surveys

Detail by Type of Visitor

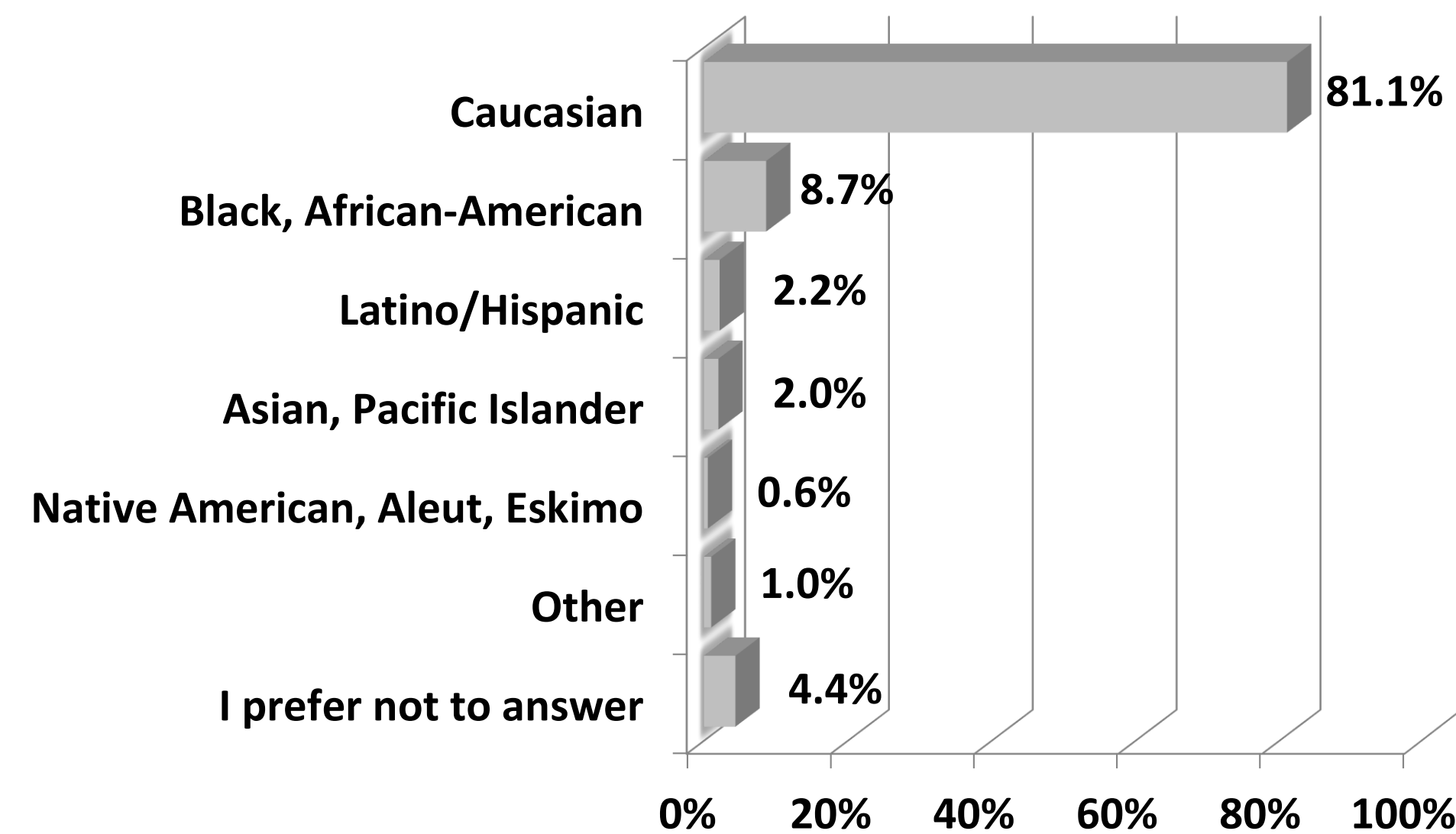
	Hotel	VFR	Day Trip
Single	24.3%	36.7%	25.4%
Single with children under 18	2.5%	5.9%	5.7%
Married	43.9%	26.6%	33.7%
Married with children under 18	20.1%	21.8%	26.2%
Domestic partnership	2.0%	1.6%	1.9%
Domestic partnership with children under 18	0.8%	1.1%	0.5%
Other	2.0%	2.1%	2.6%
I prefer not to answer	4.5%	4.3%	4.0%
Sample Size	1253	202	853

Question: Which of the following best describes your current marital status?

Ethnicity

While 81.1 percent of respondents identify as Caucasian, 14.5 percent identify as other ethnicities. The largest non-Caucasian visitor group is Black, African-American (8.7%).

Chart 32: Ethnicity



Base: All respondents. 2,406 completed surveys

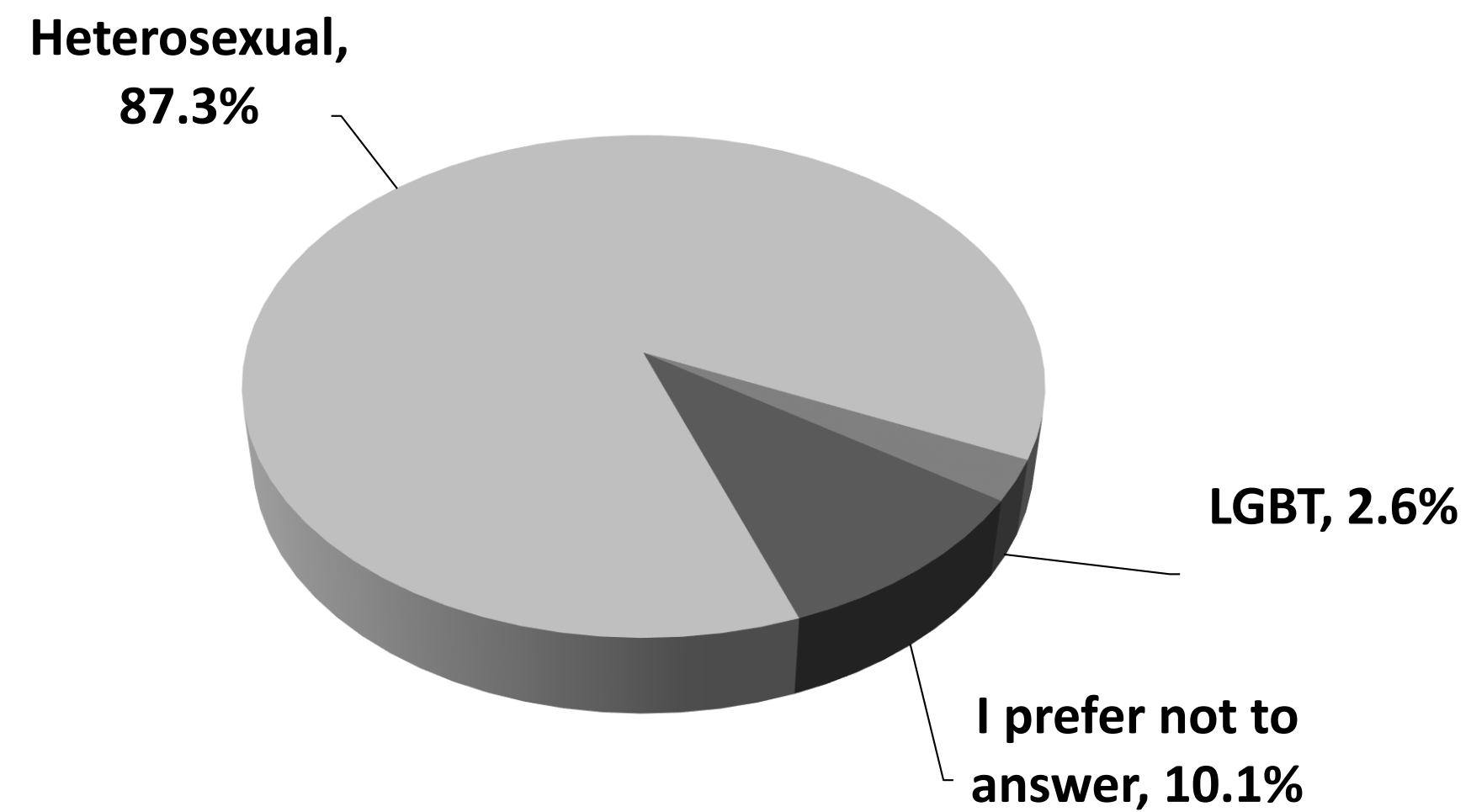
Detail by Type of Visitor

	Hotel	VFR	Day Trip
Caucasian	80.3%	74.3%	82.2%
Black, African-American	7.8%	11.4%	9.3%
Latino/Hispanic	2.6%	3.0%	2.0%
Asian, Pacific Islander	2.6%	2.5%	1.5%
Native American, Aleut, Eskimo	0.9%	2.0%	0.3%
Other	1.4%	3.0%	0.7%
I prefer not to answer	4.5%	4.0%	4.0%
Sample Size	1256	202	858

Question: Which best describes your ethnicity?

The majority of survey respondents identify as heterosexual (87.3%).

Chart 33: LGBT



Base: All respondents. 2,299 completed surveys

Detail by Type of Visitor

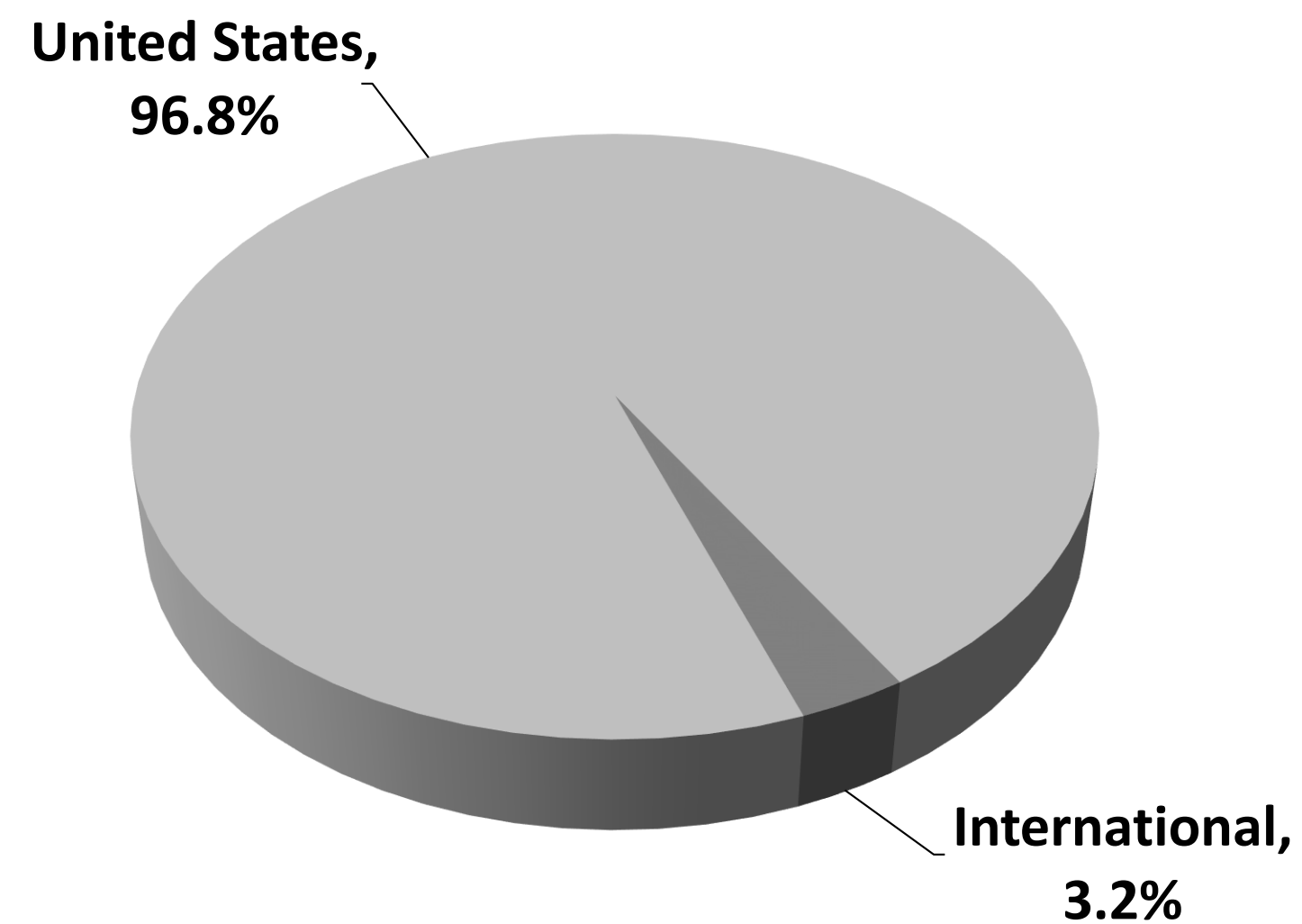
	Hotel	VFR	Day Trip
Heterosexual	88.0%	87.4%	86.9%
Gay/Lesbian/ Bisexual/ Transgender	2.7%	5.0%	2.8%
I prefer not to answer	9.3%	7.5%	10.3%
Sample Size	1228	199	833

Question: Which best describes you? (Select one)

Point of Origin: Country

In total, 96.8 percent of Louisville visitors surveyed are domestic residents who reside within the United States. The top international feeder markets were Canada (1.5%), Australia (0.3%) and the United Kingdom (0.3%). Note that the survey was only available in English.

Chart 34: Point of Origin: Country



Base: All respondents. 2,228 completed surveys

Detail by Type of Visitor

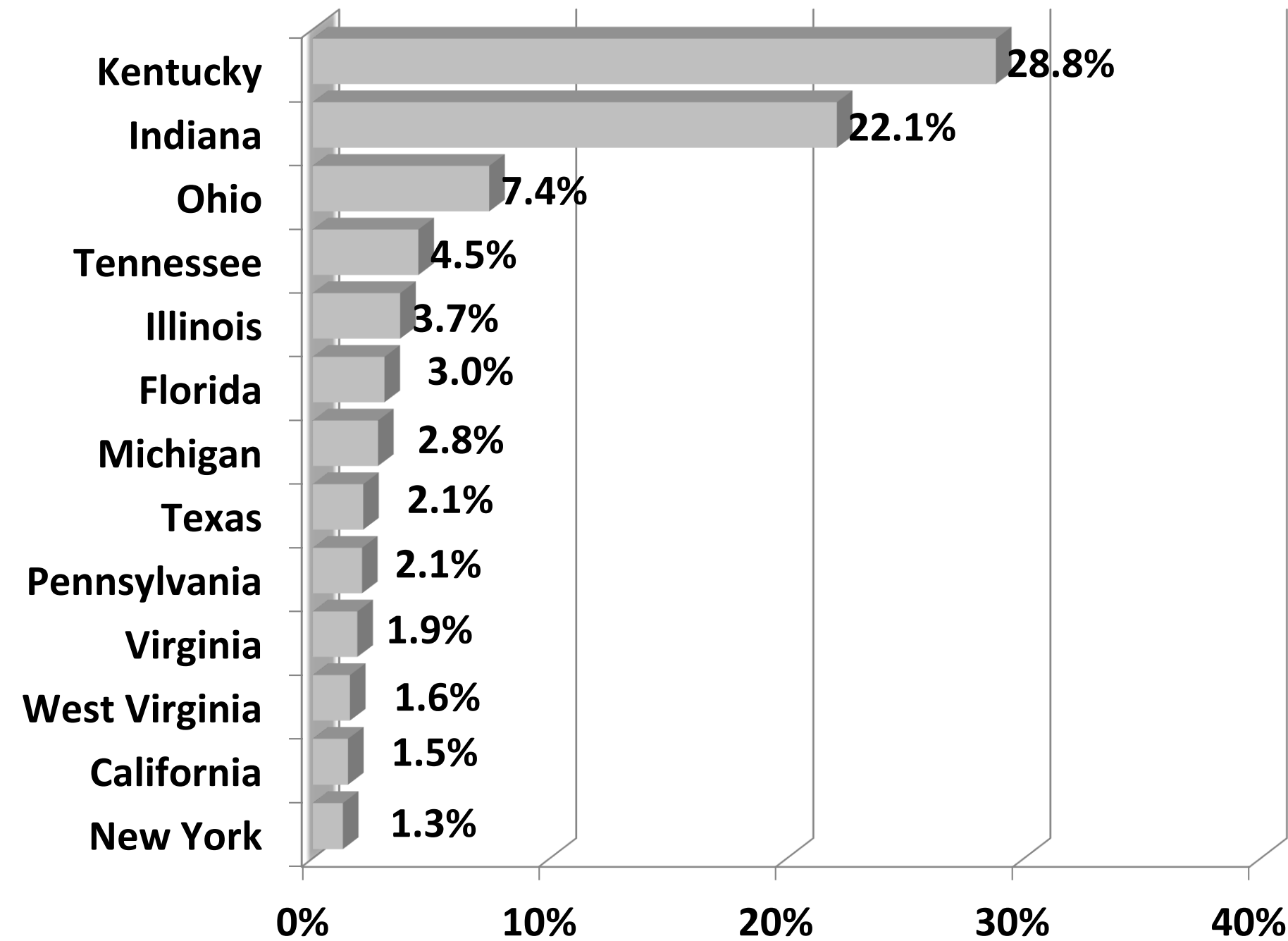
	Hotel	VFR	Day Trip
United States	97.0%	94.7%	96.8%
International	3.0%	5.3%	3.2%
Sample Size	1164	189	792

Question: In what country do you reside?

Point of Origin: State

Of the domestic Louisville visitors surveyed, 28.8 percent were from within the state of Kentucky. Indiana (22.1%), Ohio (7.4%), Tennessee (4.5%) and Illinois (3.7%) also contributed significant amounts of visitors.

Chart 35: Point of Origin: State



Base: All respondents. 2,119 completed surveys

Detail by Type of Visitor

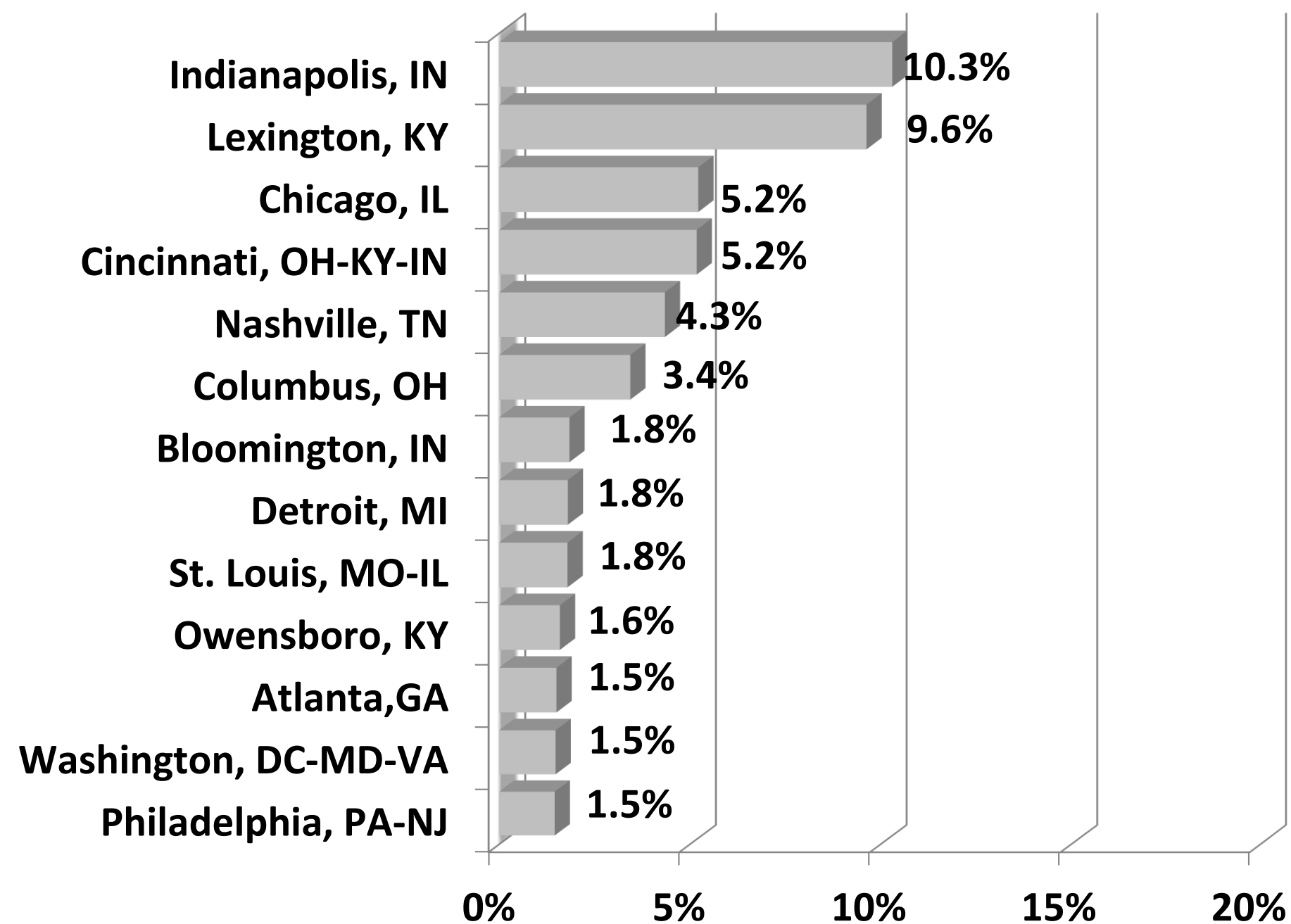
	Hotel	VFR	Day Trip
Kentucky	11.7%	14.0%	38.3%
Indiana	11.0%	6.1%	29.0%
Ohio	9.7%	7.3%	5.5%
Tennessee	6.6%	7.3%	3.9%
Illinois	6.0%	4.9%	2.3%
Florida	4.1%	7.9%	1.9%
Michigan	4.8%	3.7%	1.8%
Texas	3.7%	3.0%	1.4%
Pennsylvania	3.0%	4.9%	1.5%
Virginia	3.4%	3.0%	1.2%
West Virginia	1.3%	0.6%	1.9%
California	2.5%	2.4%	0.9%
New York	2.5%	4.3%	0.6%
Sample Size	1099	164	779

Question: What is your zip/postal code?

Point of Origin: MSA

The city's top domestic feeder markets by MSA are Indianapolis, IN MSA (10.3%), Lexington, KY MSA (9.6%), Chicago, IL MSA (5.2%) and Cincinnati, OH MSA (5.2%).

Chart 36: Point of Origin: MSA



Base: All respondents. 1,401 completed surveys

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Indianapolis, IN	6.1%	1.6%	14.3%
Lexington, KY	3.4%	4.8%	15.4%
Chicago, IL	6.3%	4.0%	3.9%
Cincinnati, OH-KY-IN	5.5%	3.2%	4.9%
Nashville, TN	3.9%	4.0%	5.2%
Columbus, OH	3.0%	3.2%	3.1%
Bloomington, IN	0.5%	0.0%	3.1%
Detroit, MI	2.3%	3.2%	1.6%
St. Louis, MO-IL	1.5%	4.0%	1.8%
Owensboro, KY	0.1%	0.0%	2.9%
Atlanta, GA	1.4%	0.8%	0.8%
Washington, DC-MD-VA	2.4%	4.0%	0.8%
Philadelphia, PA-NJ	1.1%	1.6%	1.3%
Sample Size	841	126	384

Question: What is your zip/postal code?