



Longwoods
INTERNATIONAL

Louisville 2016 Visitor Research



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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 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 2016.

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 2016 travel year, this yielded :
 - 308,946 trips for analysis nationally:
 - 216,738 overnight trips
 - 92,208 day trips
- For Louisville, the following sample was achieved in 2016:
 - 1,181 trips:
 - 710 overnight trips
 - 471 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 2016, Louisville had 24.7 million person trips, increasing 2% from 2015. Of these trips, 37% were overnight trips. The rest were day trips.
- The overnight trips generated \$1.32 billion in spending, increasing 3% from 2015.
- “Visiting friends and relatives” (at 45%) 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 was the highest marketable trip purpose.
- For overnight trips, the top state markets for Louisville visitors were Kentucky, Indiana, and Ohio. Among DMAs, the top three visitor sources were Lexington, Nashville, and Chicago.

Key Findings (Cont'd)

- Over two-thirds (71%) of Louisville visitors were very satisfied with the overall trip experience. Most satisfaction elements were similar to 2015.
- Of the overnight respondents, 80% have visited Louisville at least once. Sixty-eight percent (68%) had visited in the past year.
- Similar to the national average, over half (56%) of the overnight trips were planned 2 months or less before the trip. Similar to the national average, ten percent (10%) did not plan anything in advance.
- “Hotel or resort,” “online travel agencies,” and “advice from relatives or friends” were the most common planning sources for a Louisville overnight trip. “Hotel or resort” was the most common booking source.

Key Findings (Cont'd)

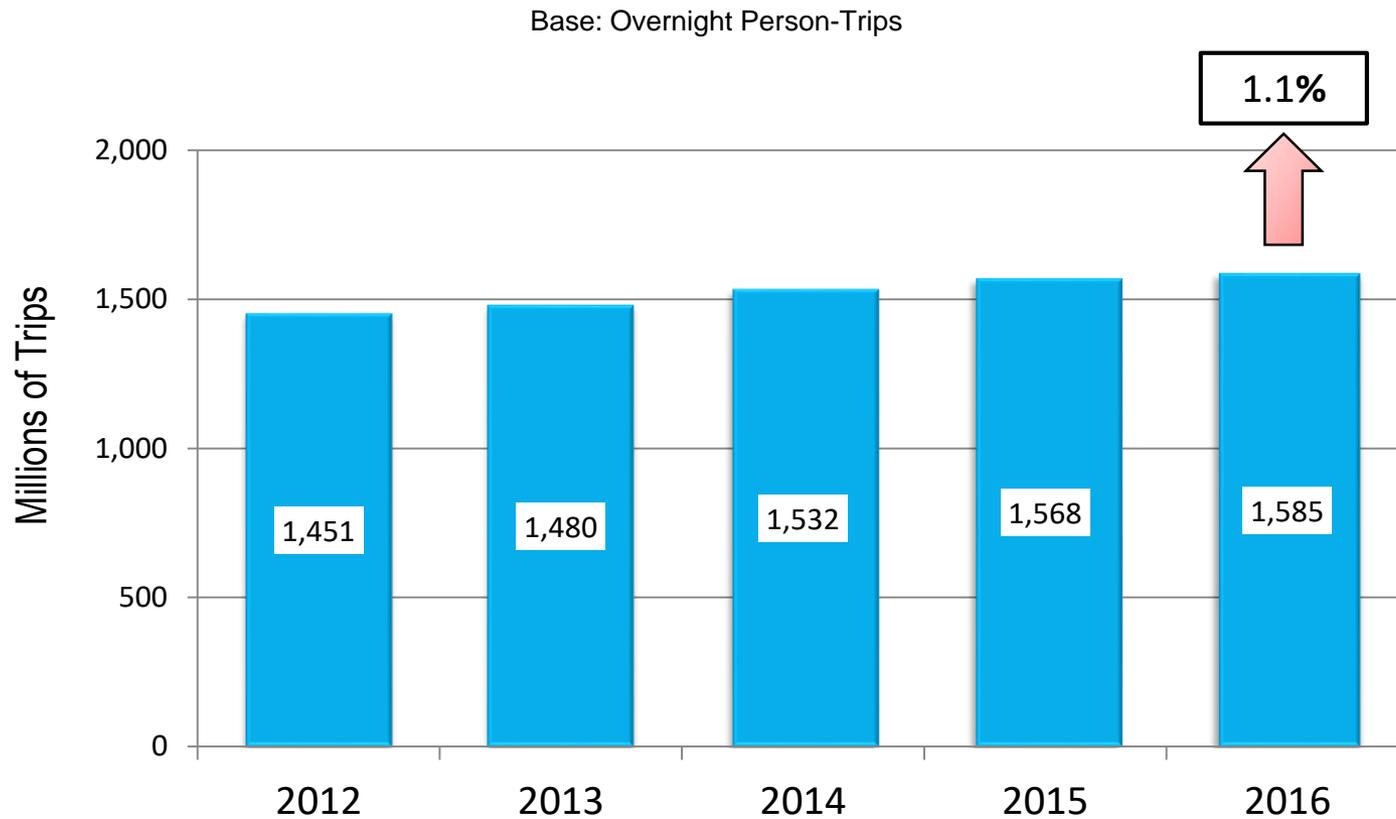
- The average number of nights spent in Louisville for an overnight trip was 2.4 nights, down from 2.5 nights in 2015. The average travel party size was 2.8 persons.
- Eighty percent (80%) of overnight Louisville travelers arrived by personal car or truck.
- The top five overnight Louisville trip activities and experiences were “Shopping,” “Fine Dining,” “Landmark/Historic Site,” “Museum,” and “Swimming.”
- The highest social media activities on an overnight trip to Louisville were “posting photos online,” “reading travel reviews,” “looking at photos online,” and “accessing the internet to learn about travel deals, news, events, or promotions.” The usage of social media on the overnight trip slightly higher than 2015.



Size & Structure of the U.S. Travel Market

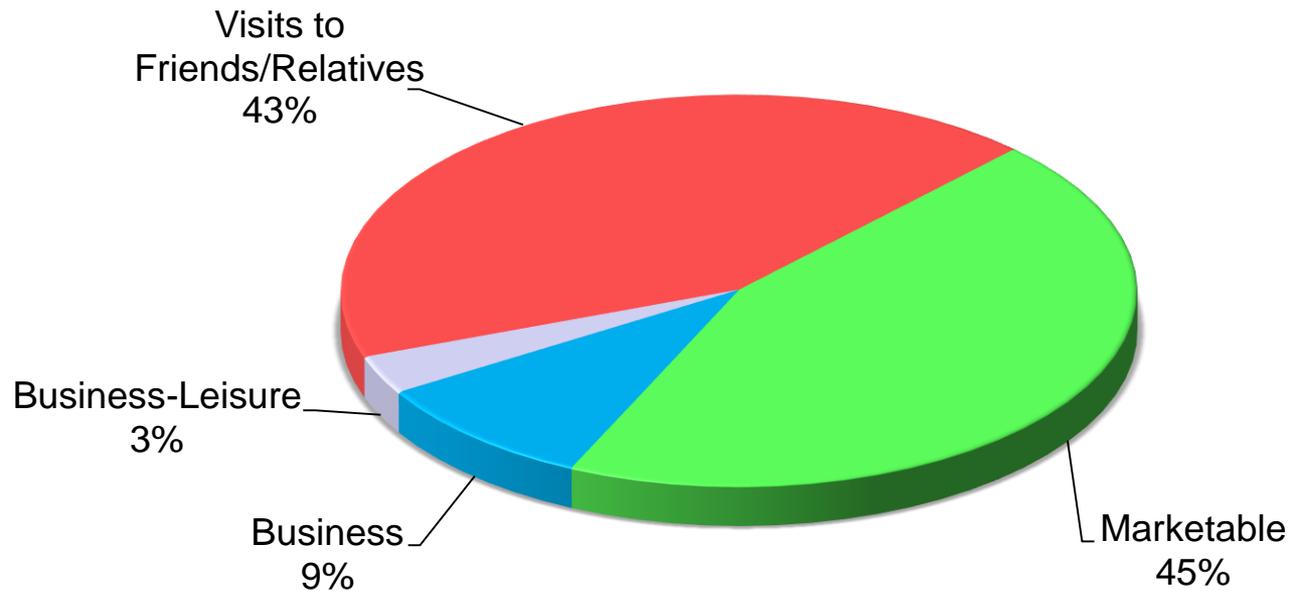


Total Size of the U.S. Travel Market — 2012-2016



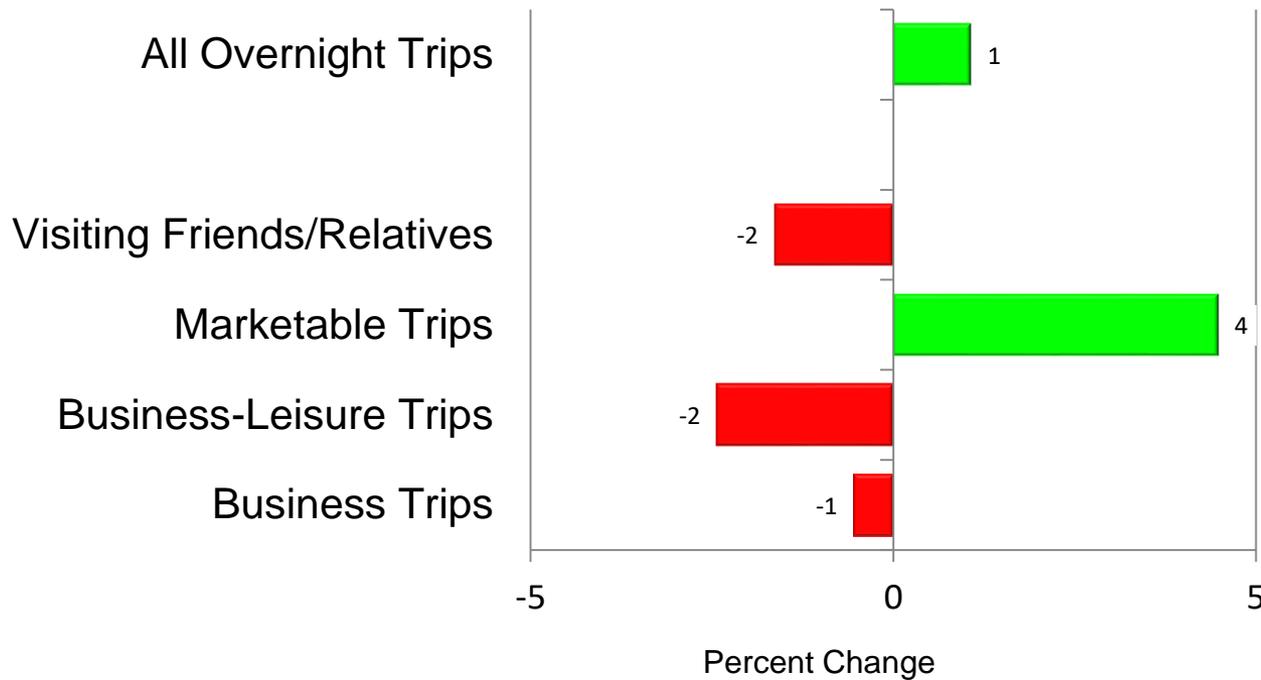
Structure of the U.S. Travel Market — 2016 Overnight Trips

Base: Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2016 vs. 2015

Base: Overnight Person-Trips





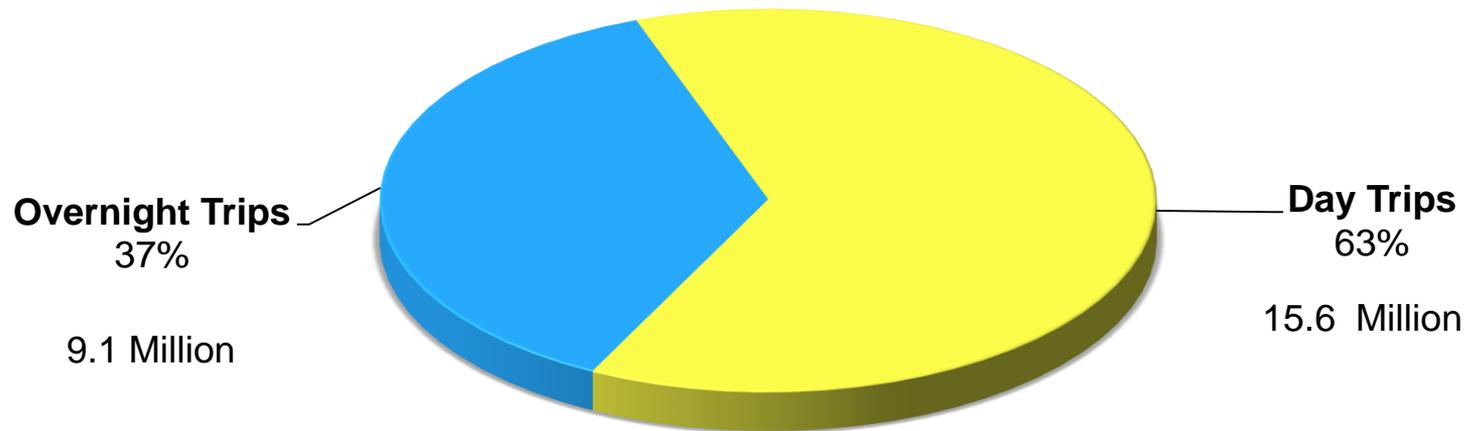
Size & Structure of Louisville's Domestic Travel Market



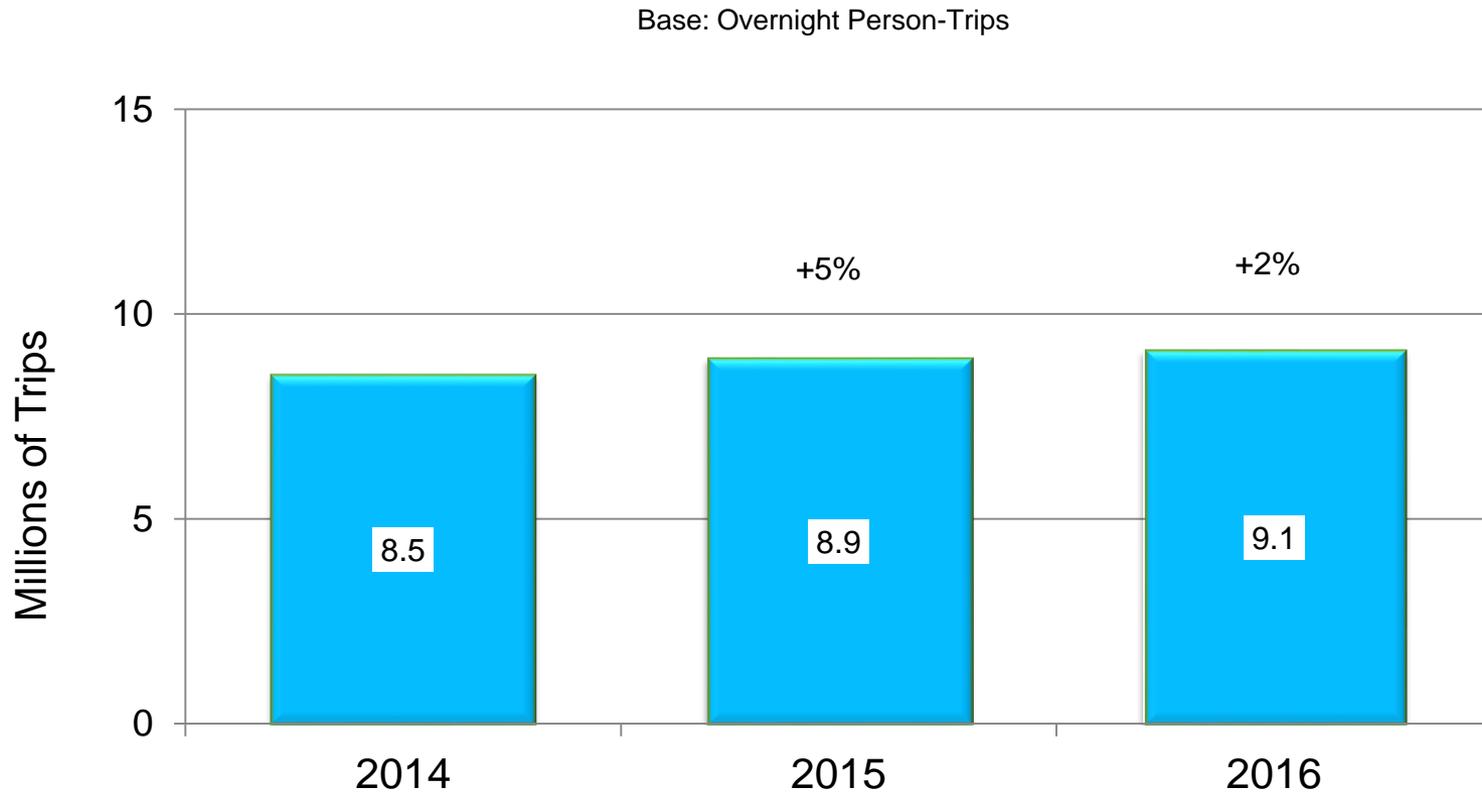
Total Size of Louisville 2016 Domestic Travel Market

Total Person-Trips = 24.7 Million

+2.0% vs. 2015

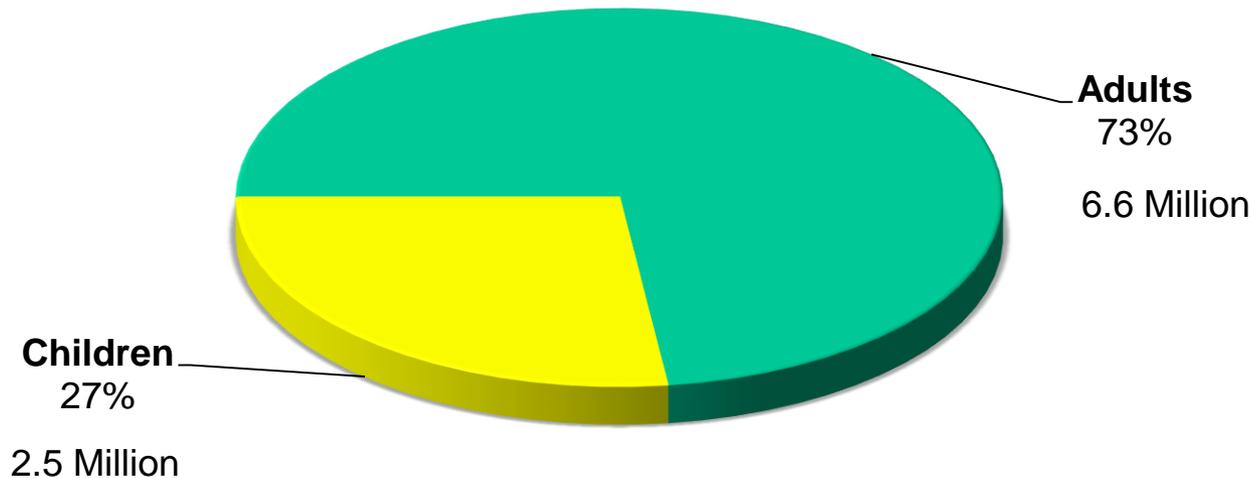


Overnight Trips to Louisville



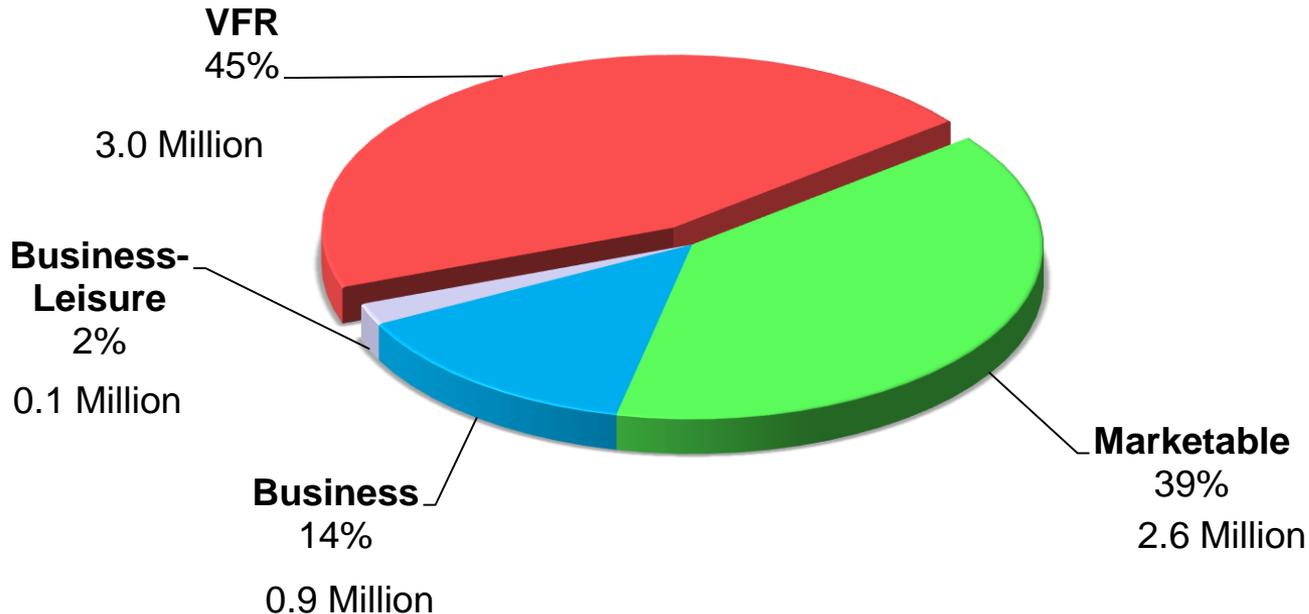
Size of Louisville Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 9.1 Million



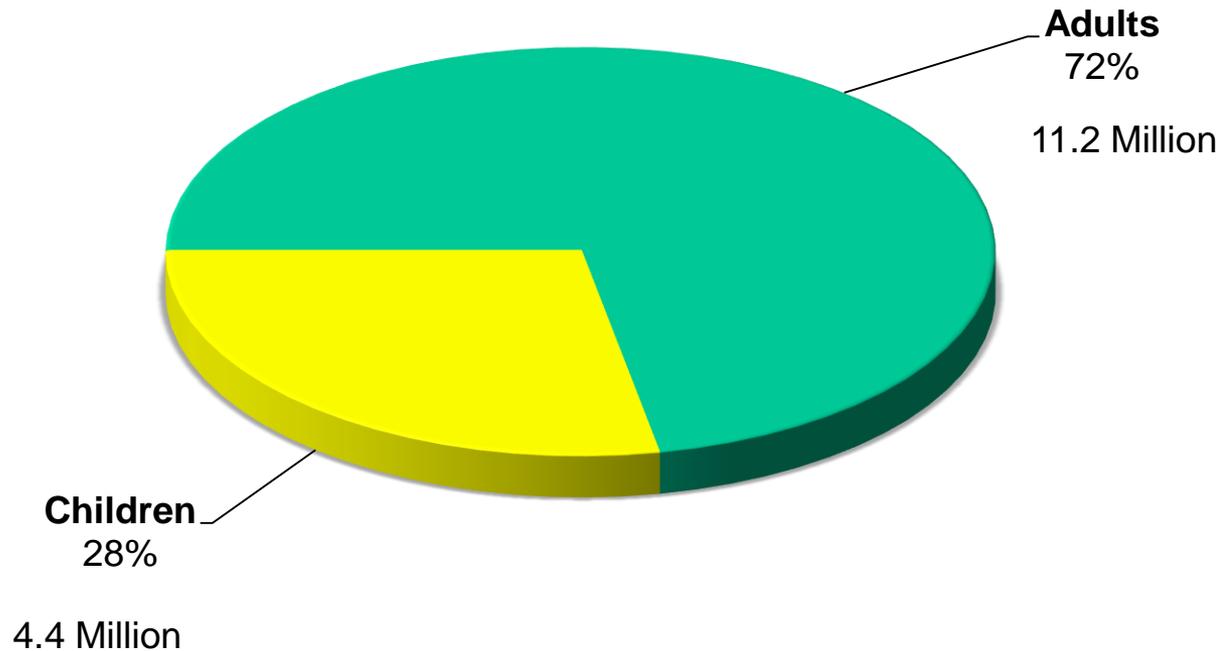
Louisville Overnight Travel Market — by Main Trip Purpose

Adult Overnight Person-Trips = 6.6 Million



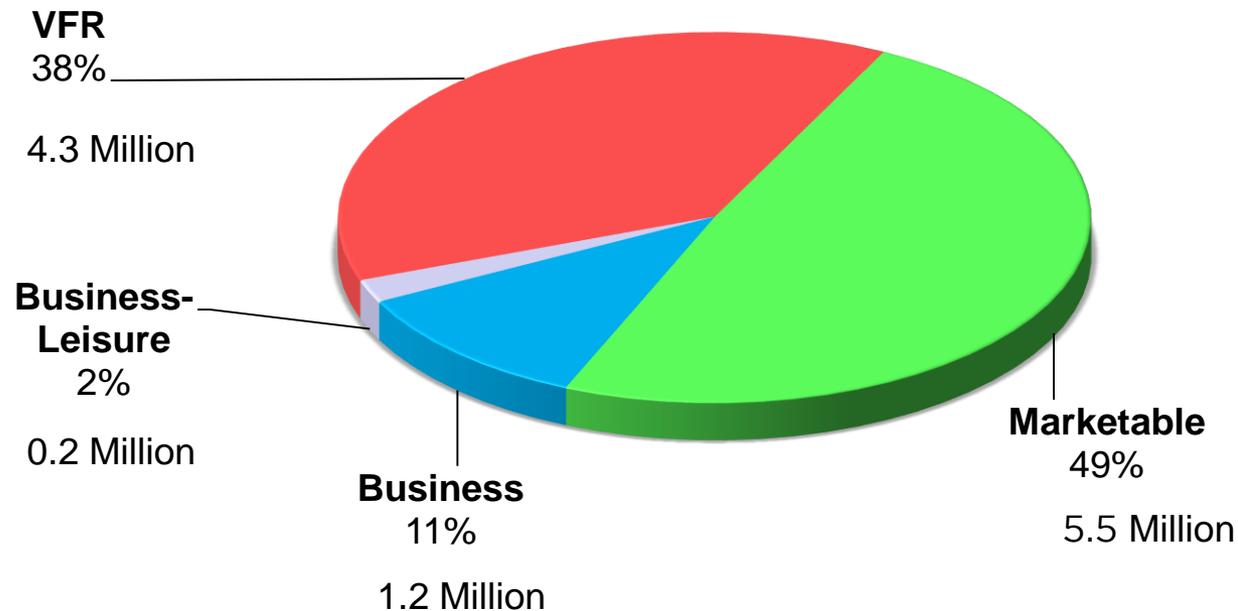
Size of Louisville Day Travel Market — Adults vs. Children

Total Day Person-Trips = 15.6 Million



Louisville Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 11.2 Million





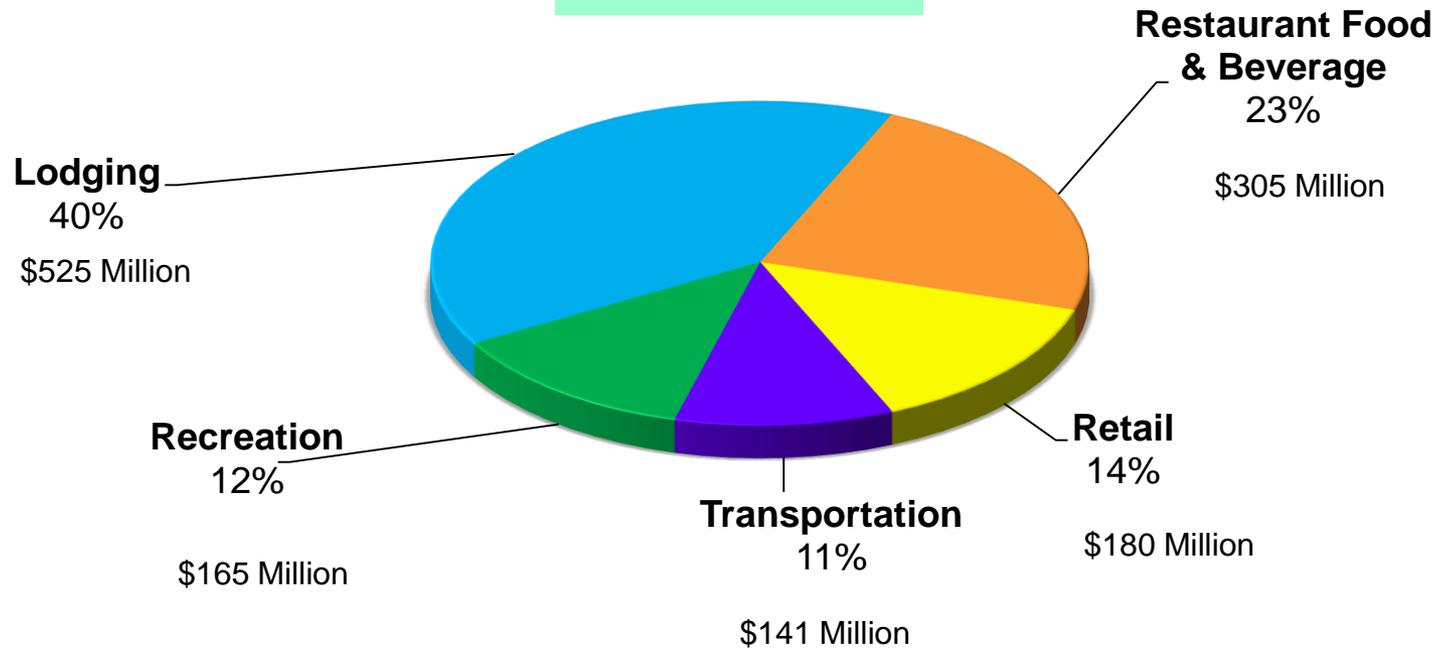
Overnight Trip Expenditures



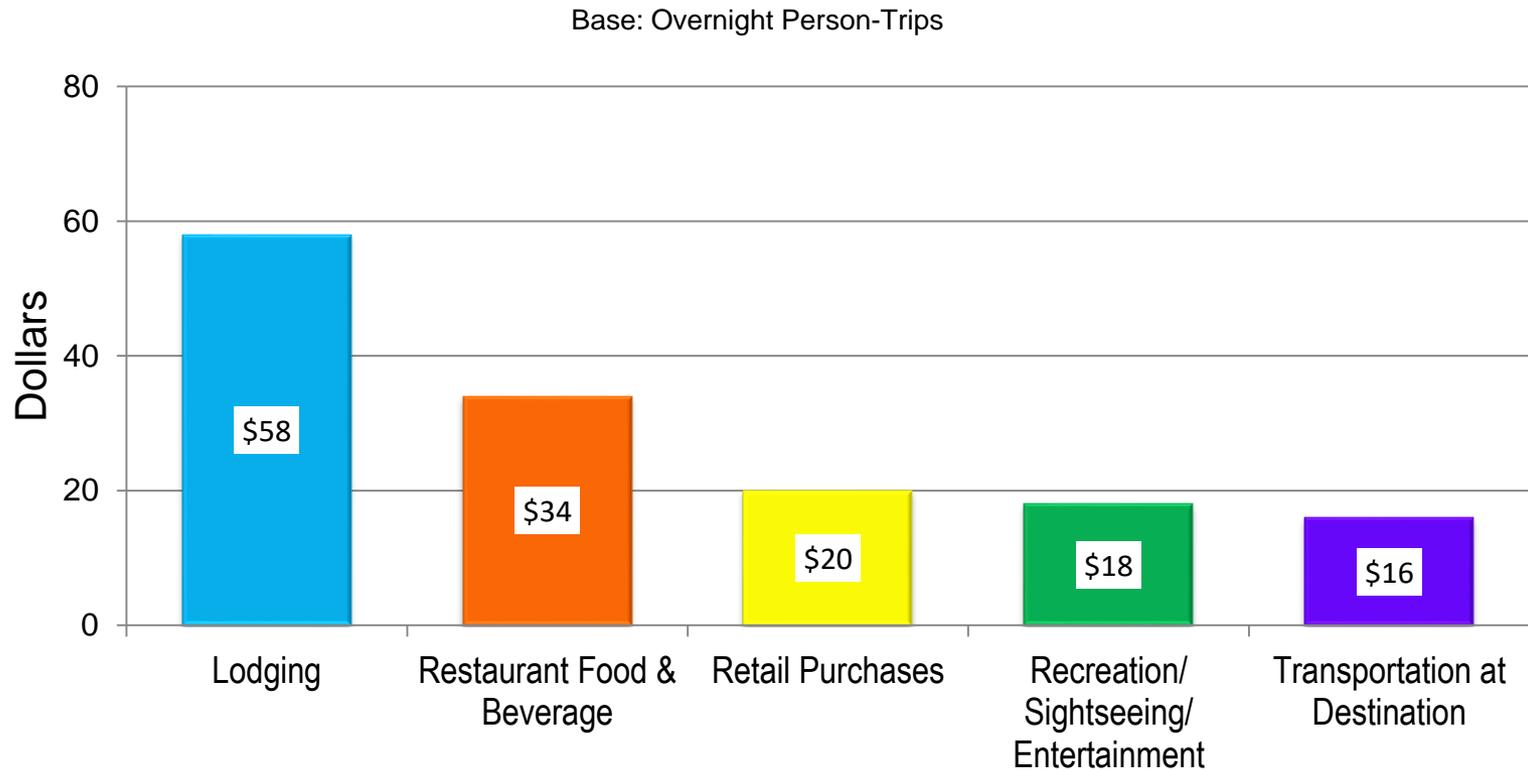
Domestic Overnight Expenditures — by Sector

Total Spending = \$1.316 Billion

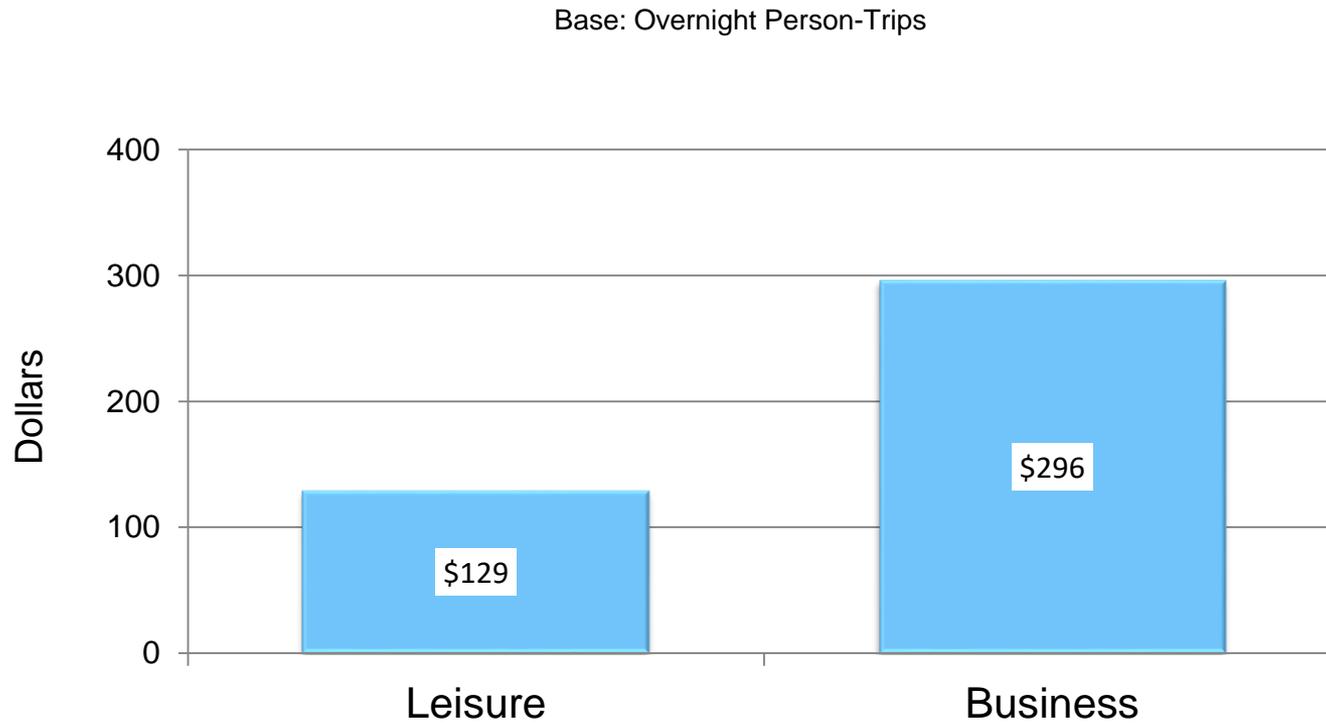
+2.6% vs. 2015



Average Per Person Expenditures on Domestic Overnight Trips — By Sector

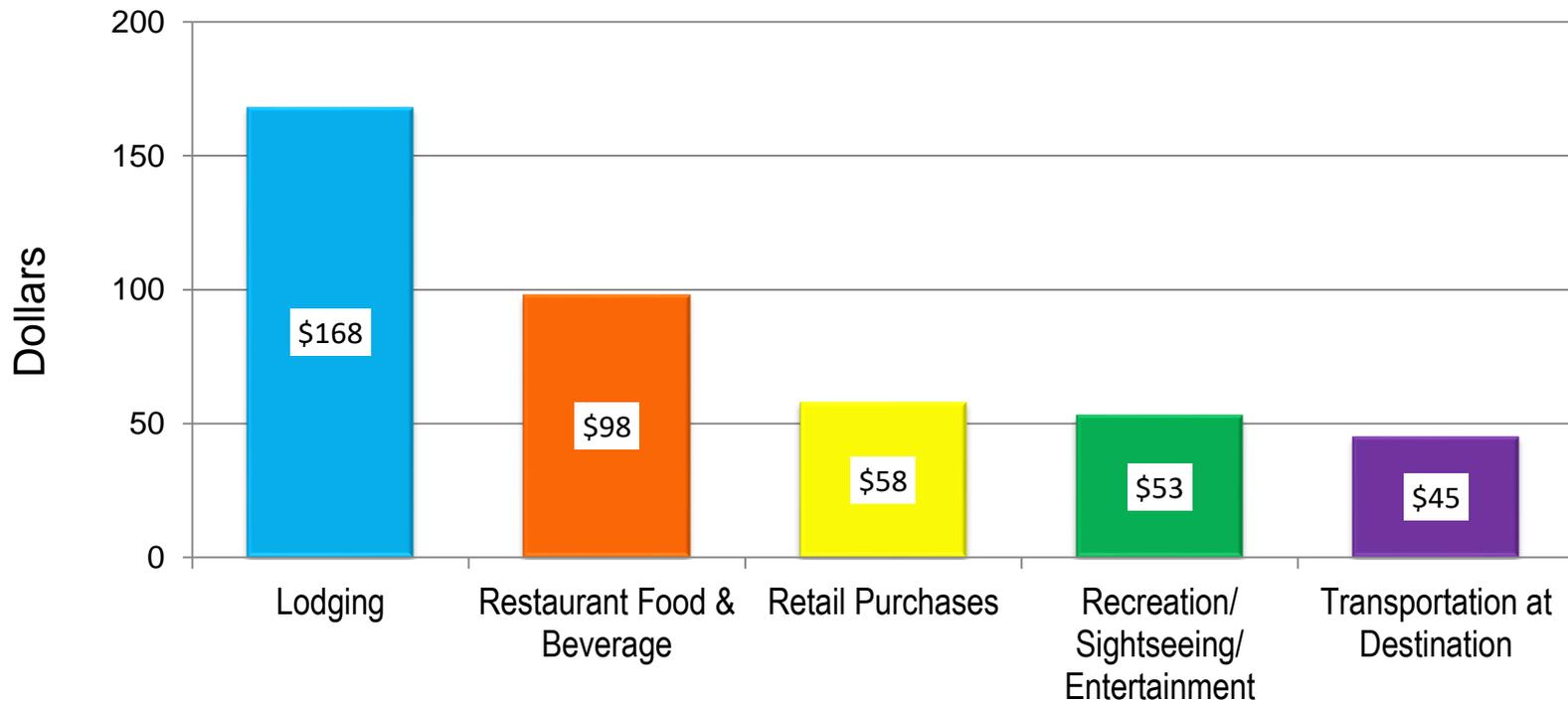


Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose

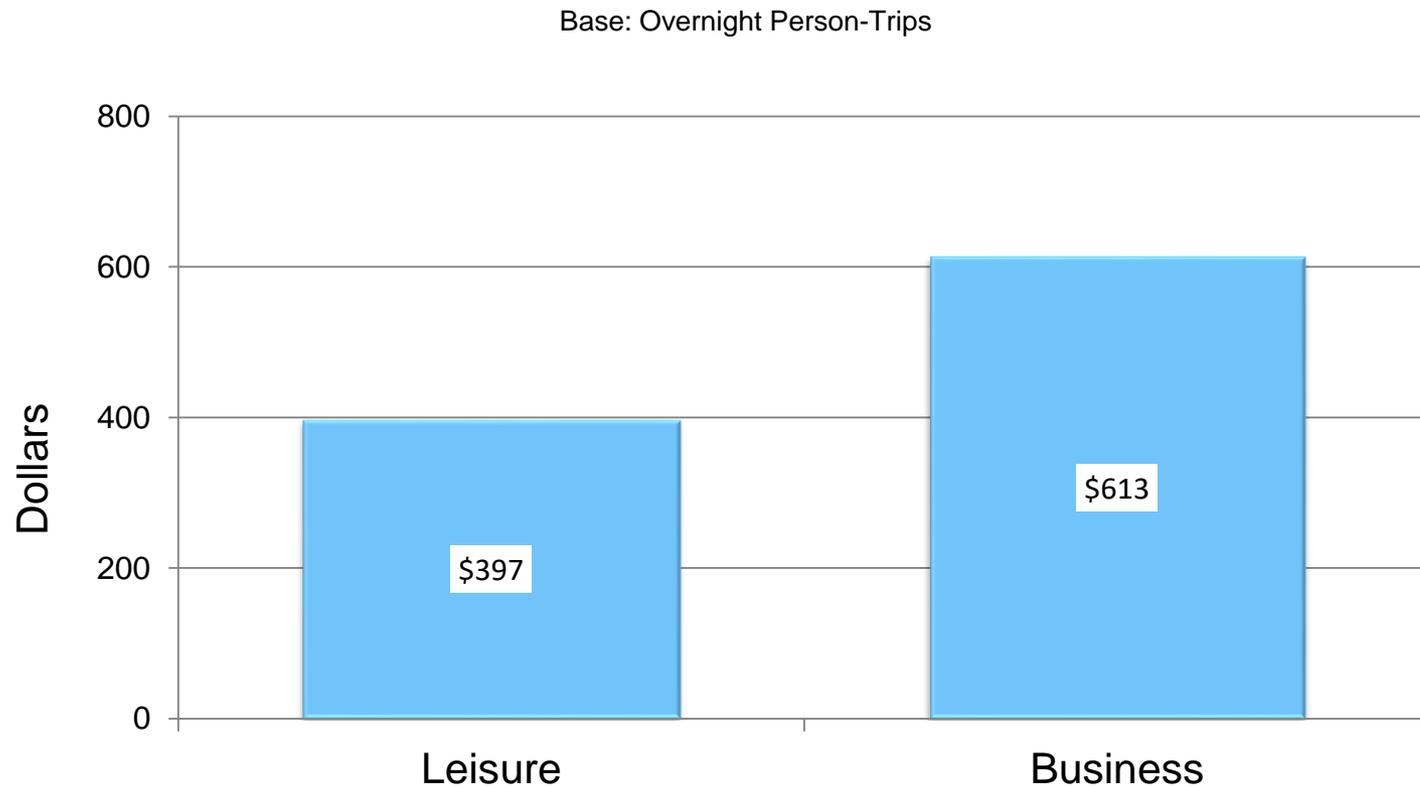


Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Overnight Person-Trips

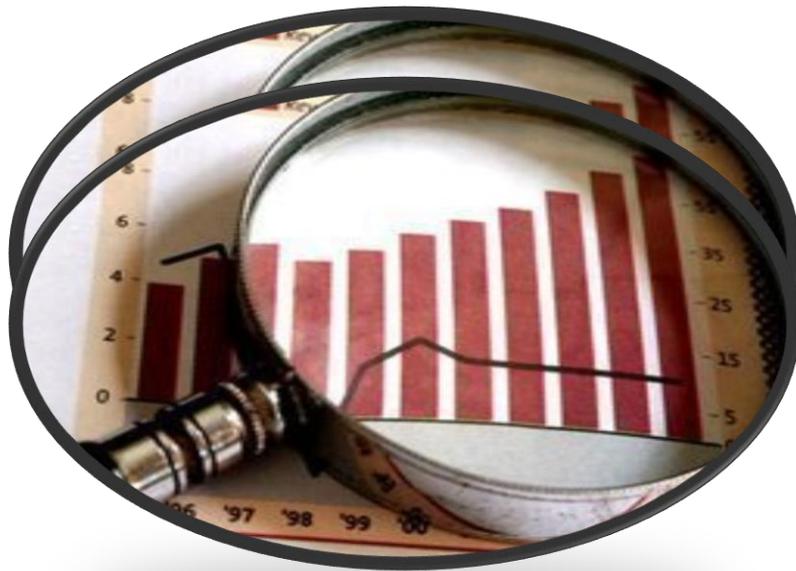


Average Per Party Expenditures on Domestic Overnight Trips — by Trip Purpose



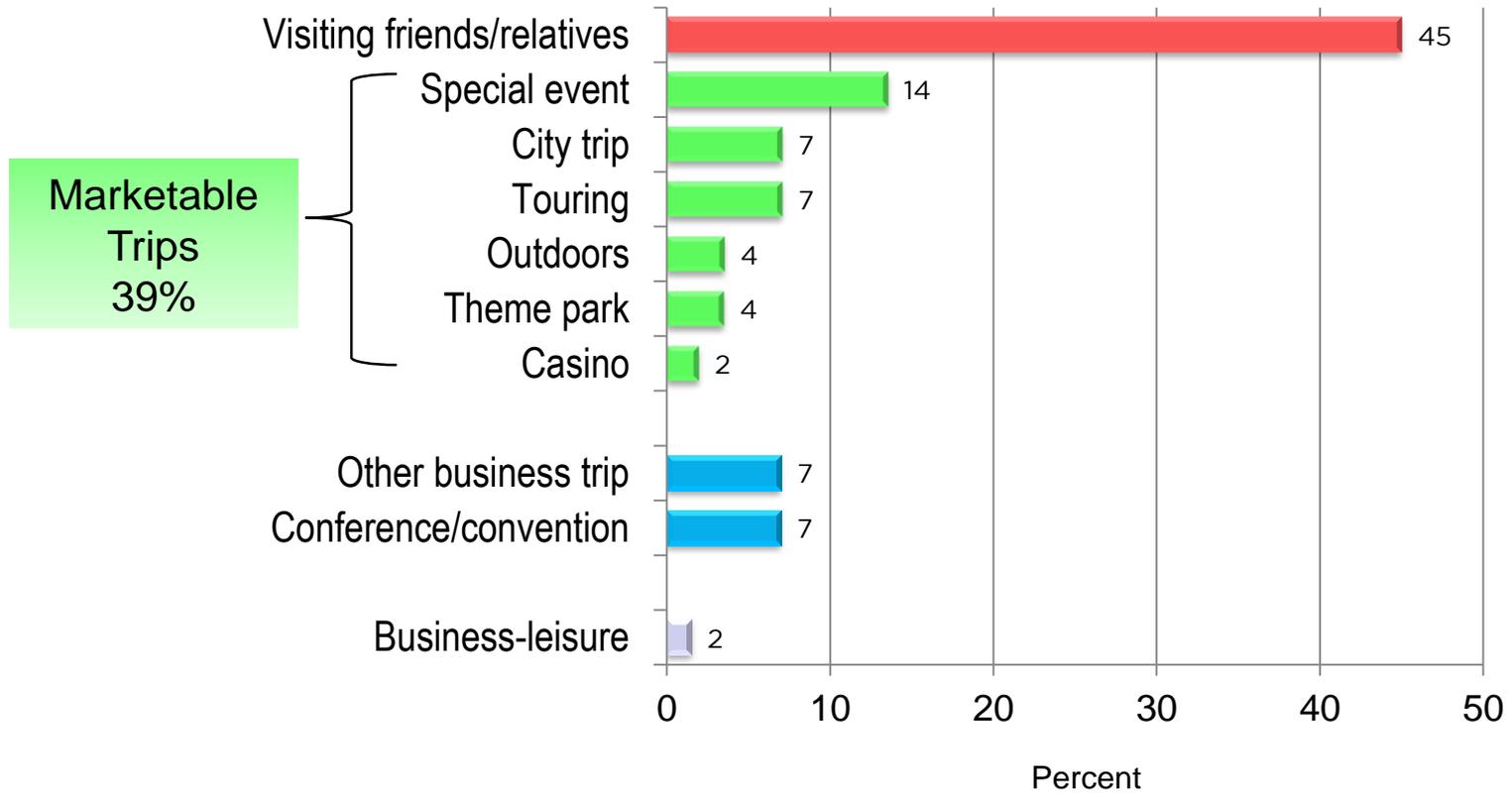


Overnight Trip Characteristics

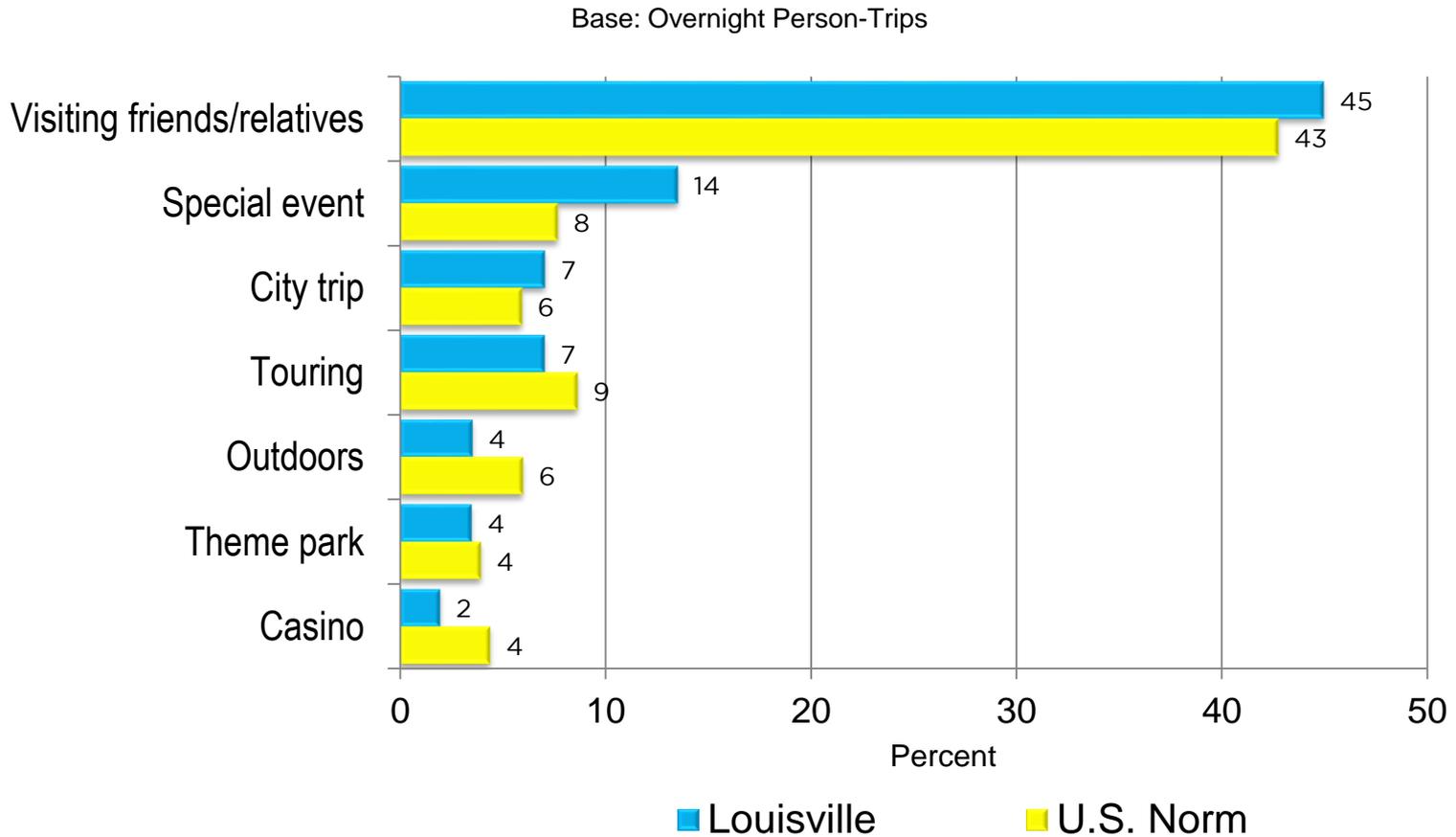


Main Purpose of Trip

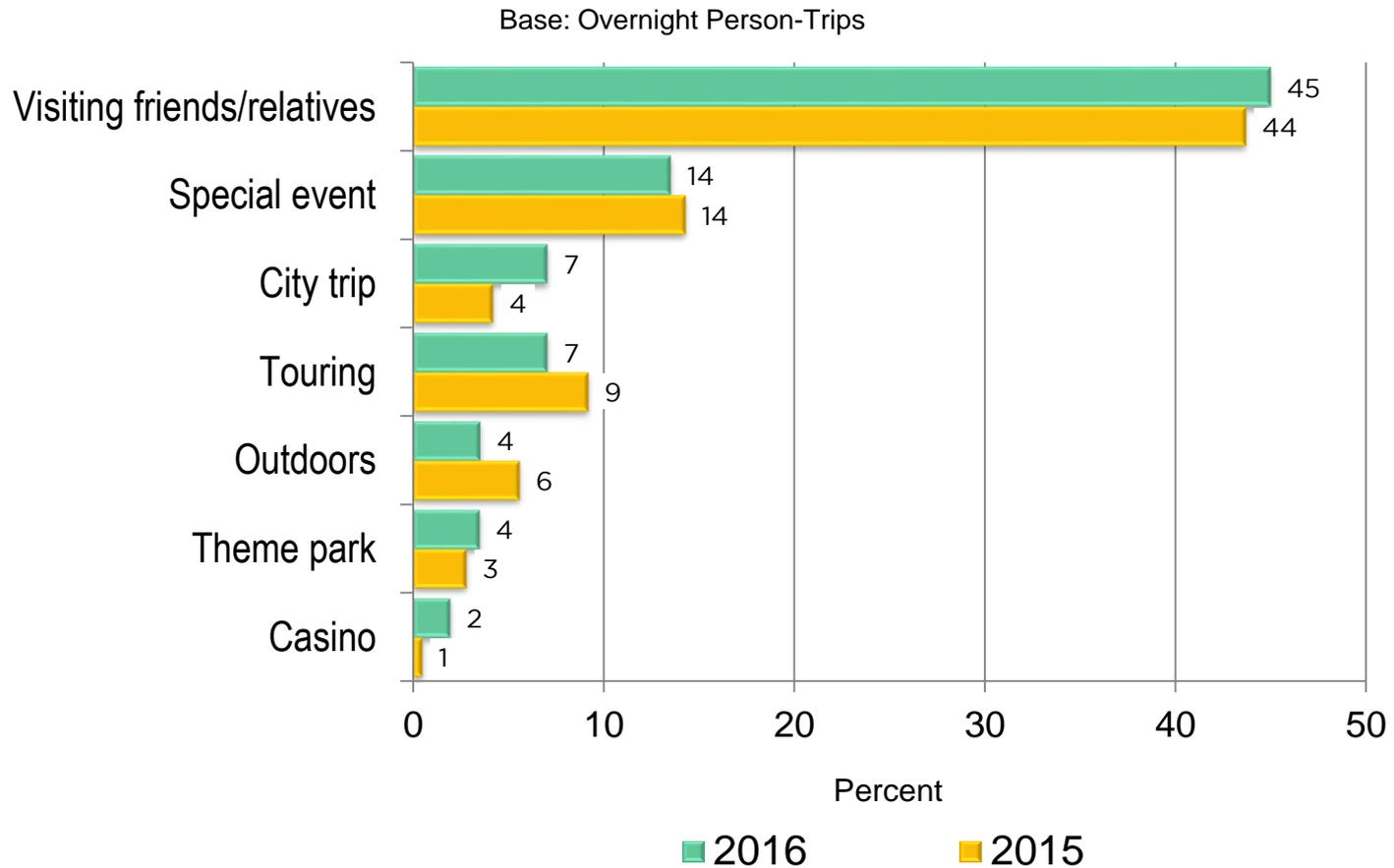
Base: Overnight Person-Trips



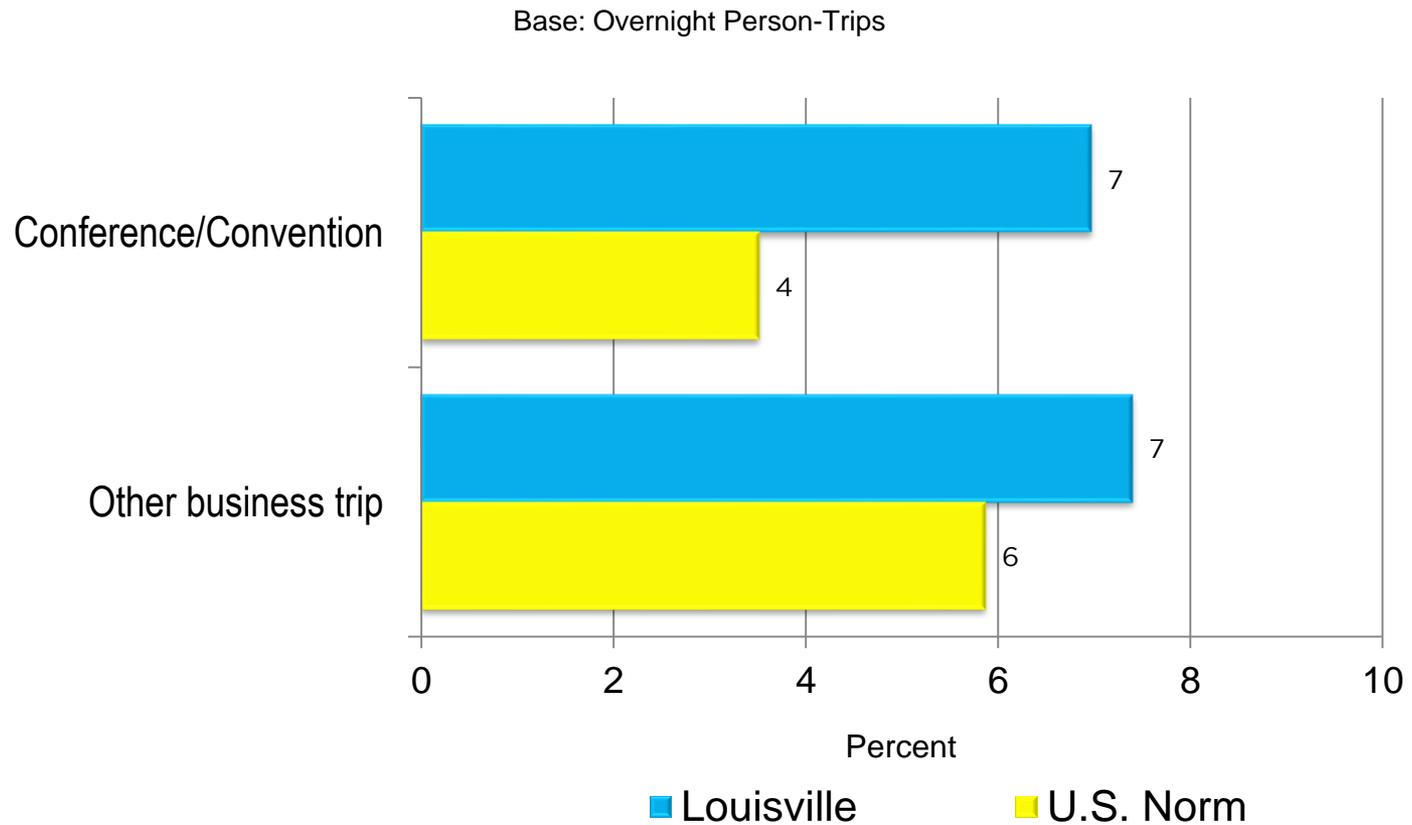
Main Purpose of Leisure Trip



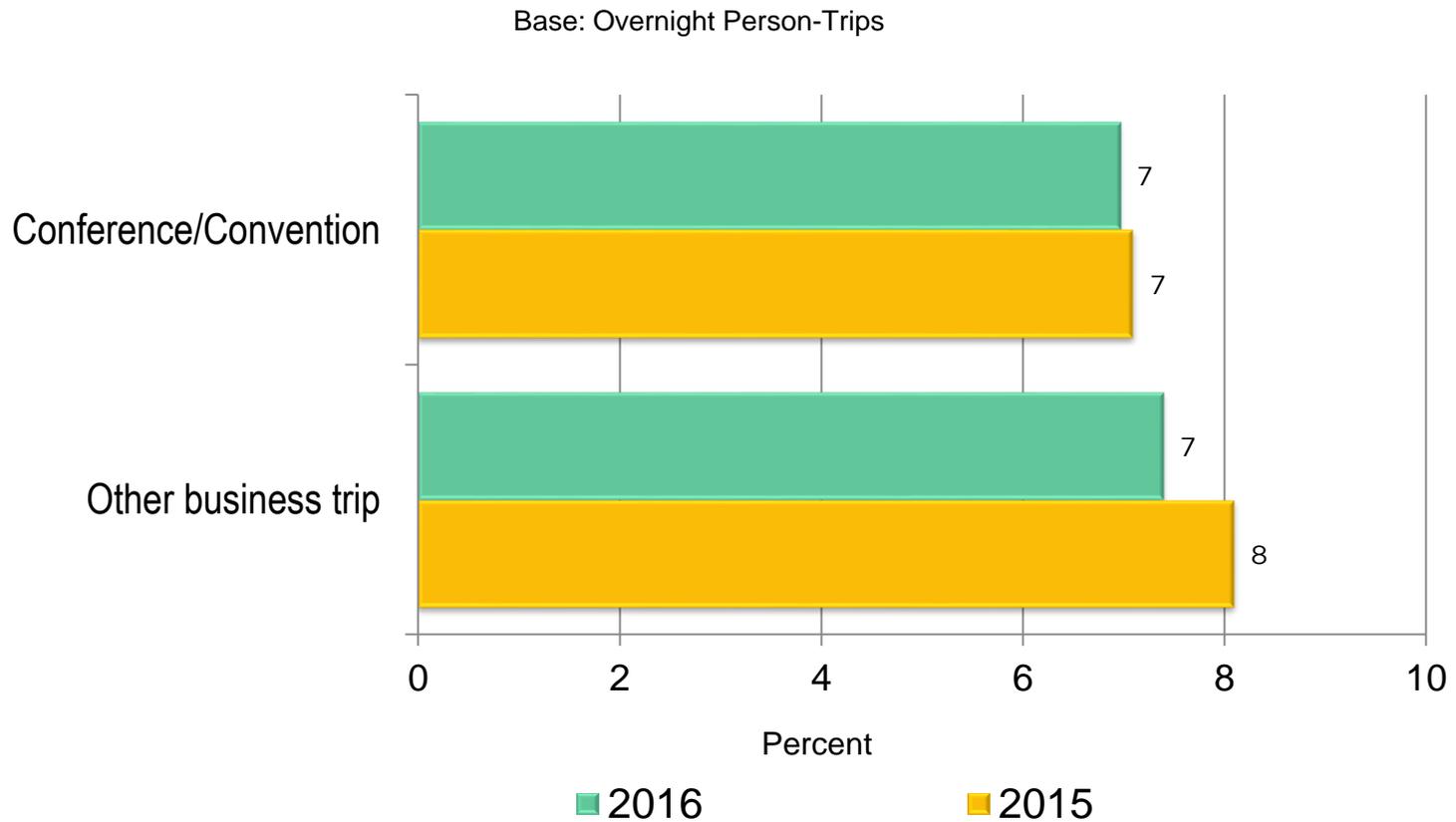
Main Purpose of Overnight Leisure Trip — 2016 vs. 2015



Main Purpose of Business Trip

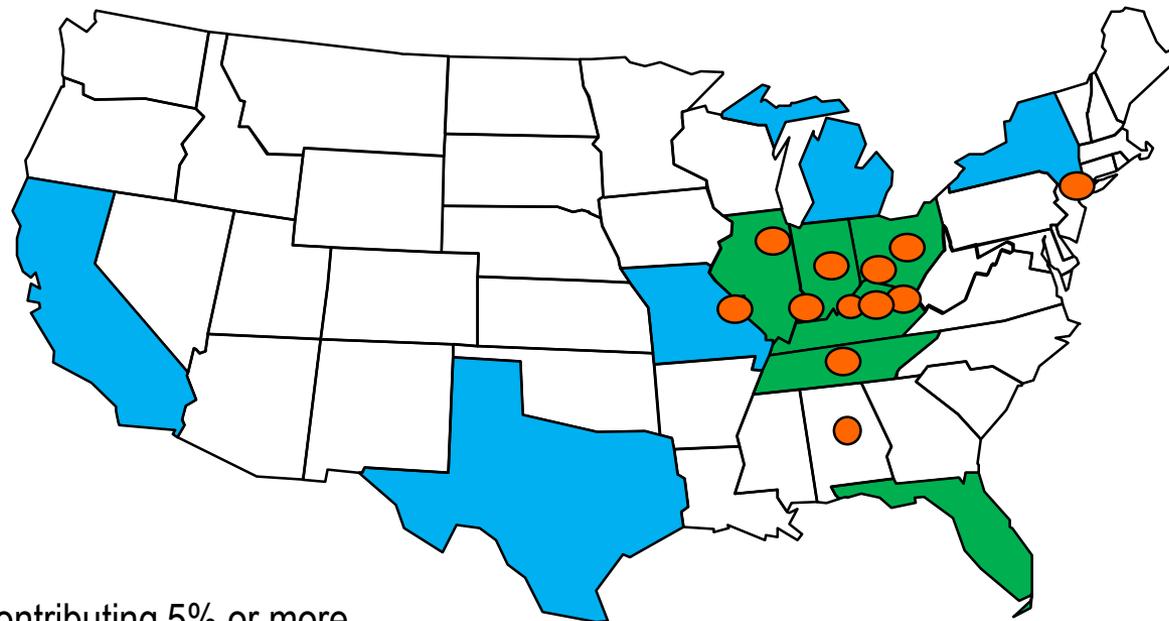


Main Purpose of Overnight Business Trip — 2016 vs. 2015



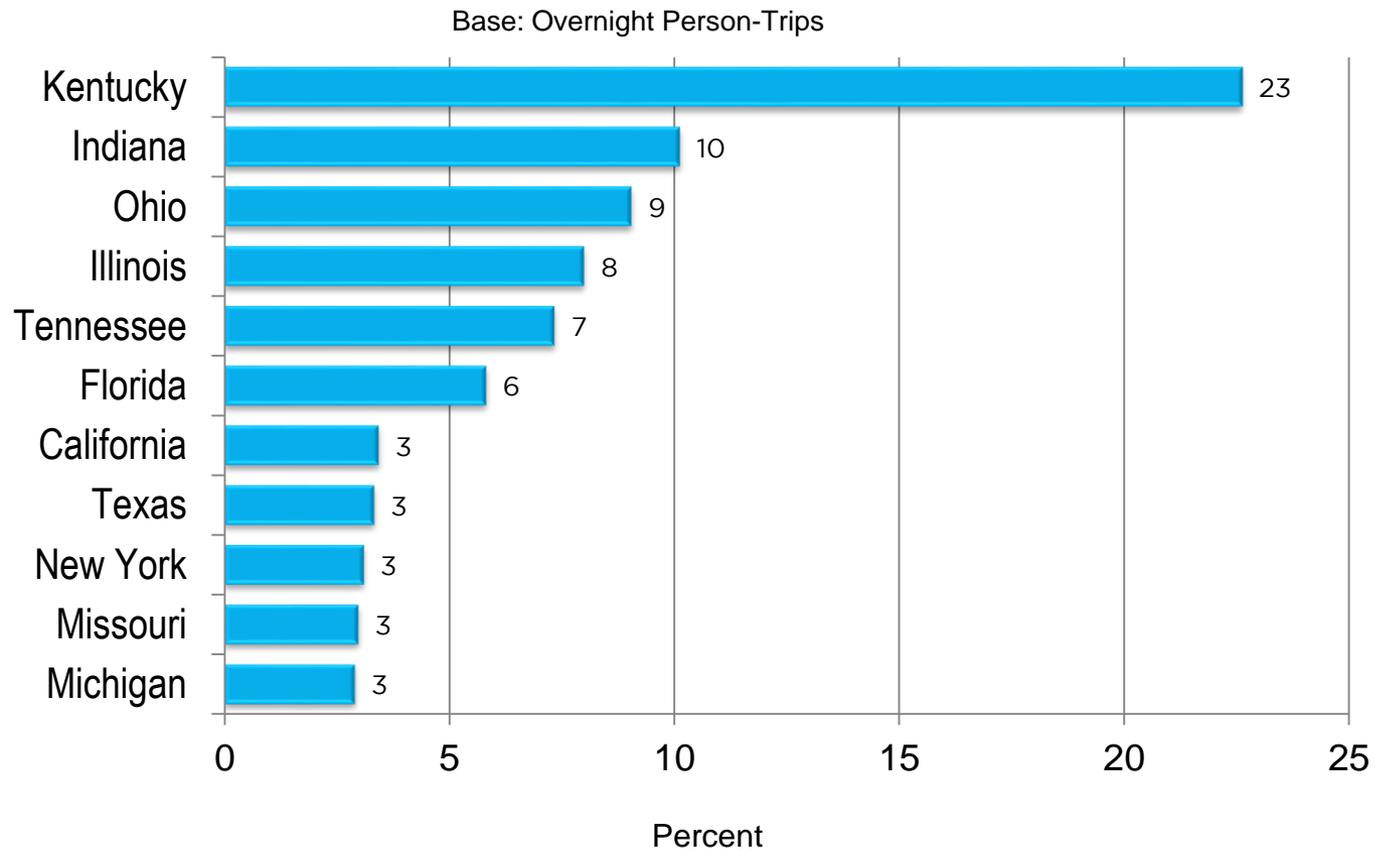
Sources of Business

Base: Overnight Person-Trips

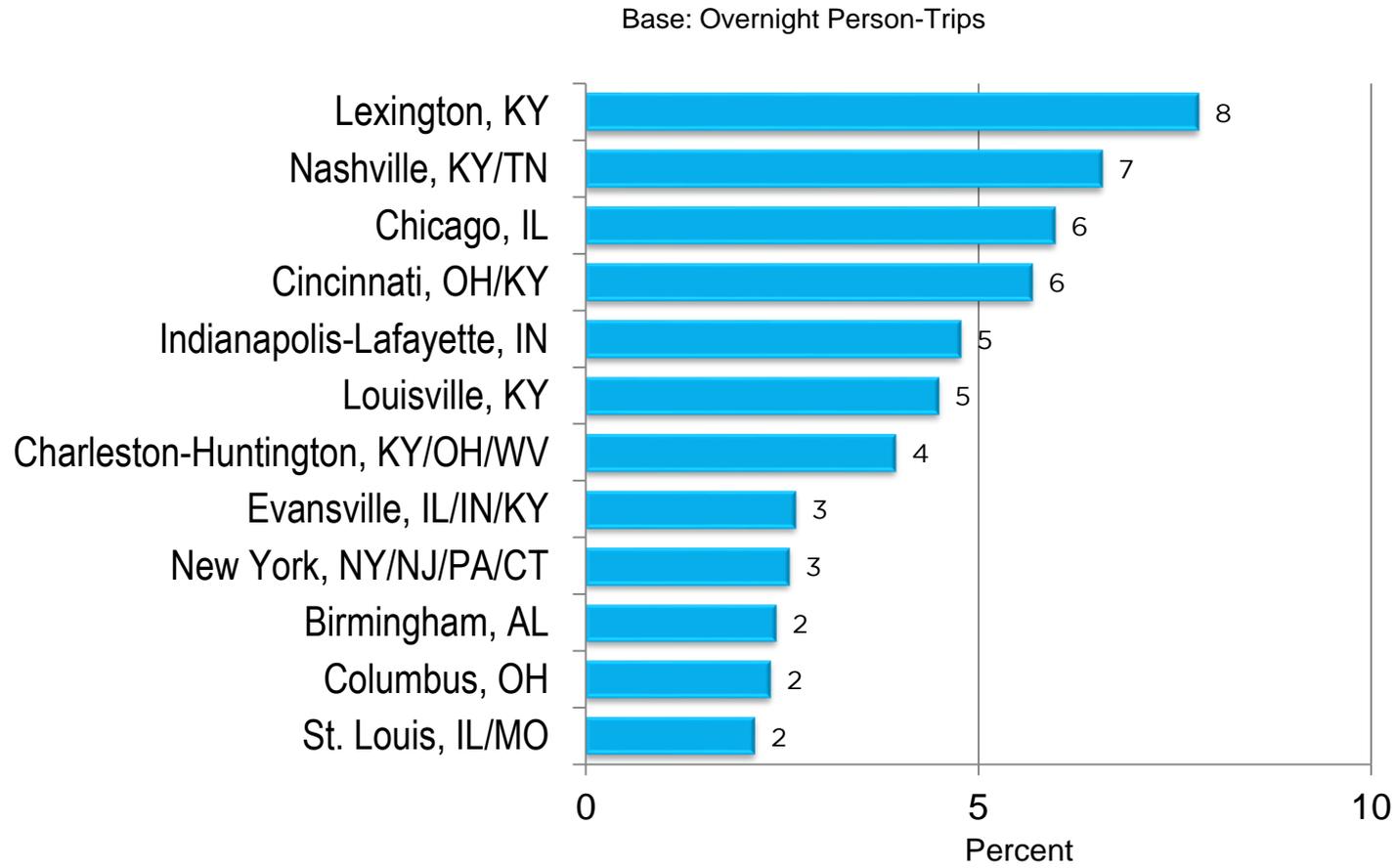


- States contributing 5% or more
- States contributing 3% - 5%
- DMA's contributing more than 2%

State Origin Of Trip

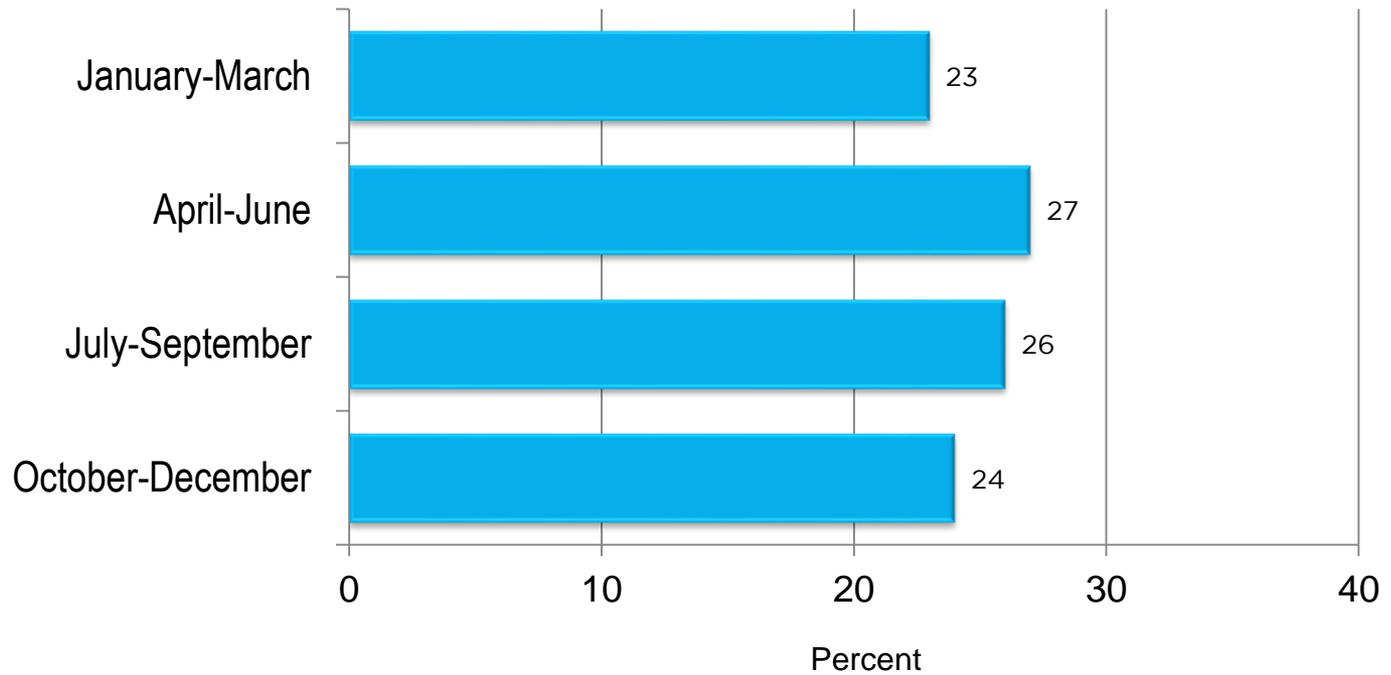


DMA Origin Of Trip

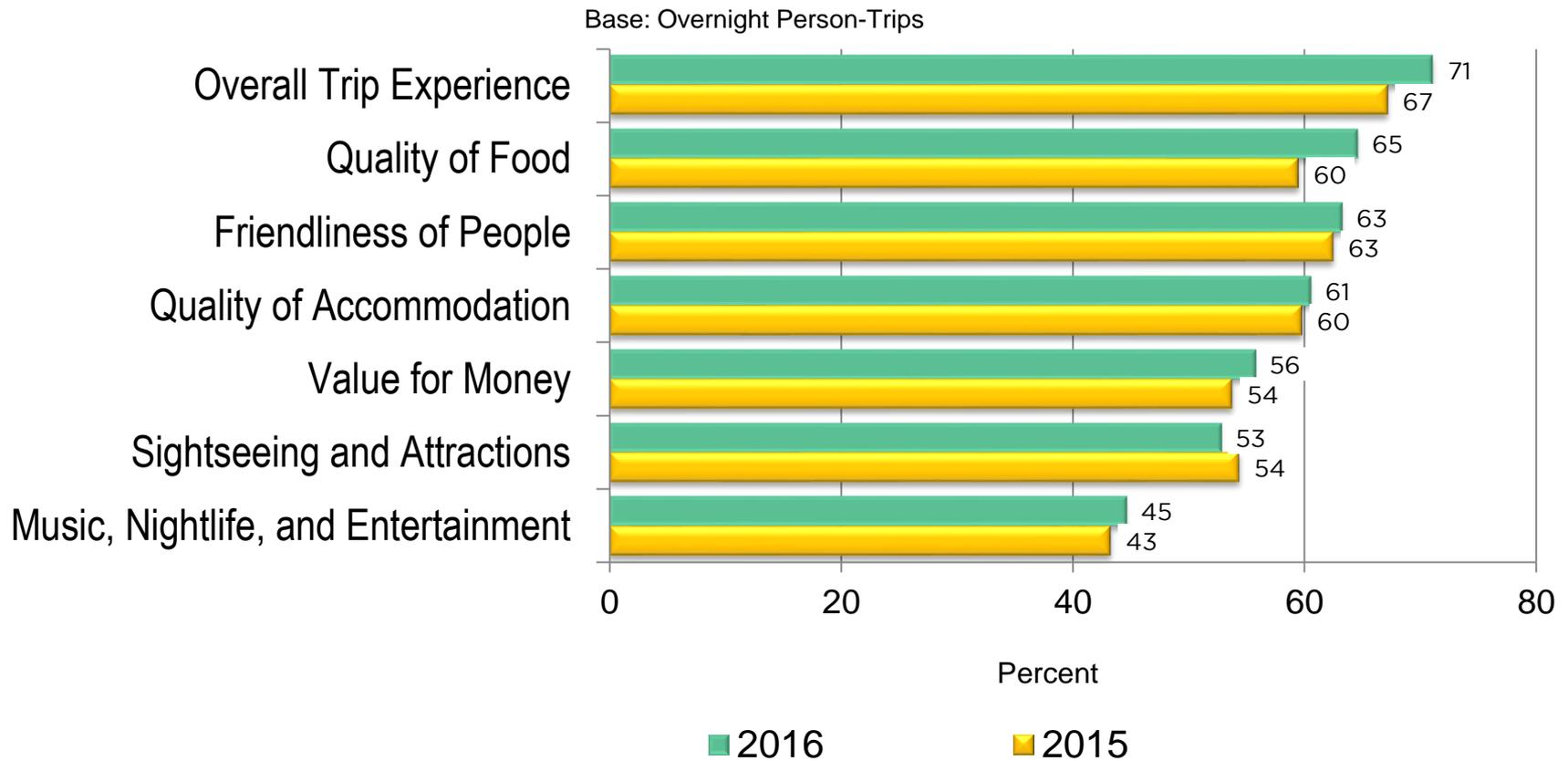


Season of Trip

Base: Overnight Person-Trips

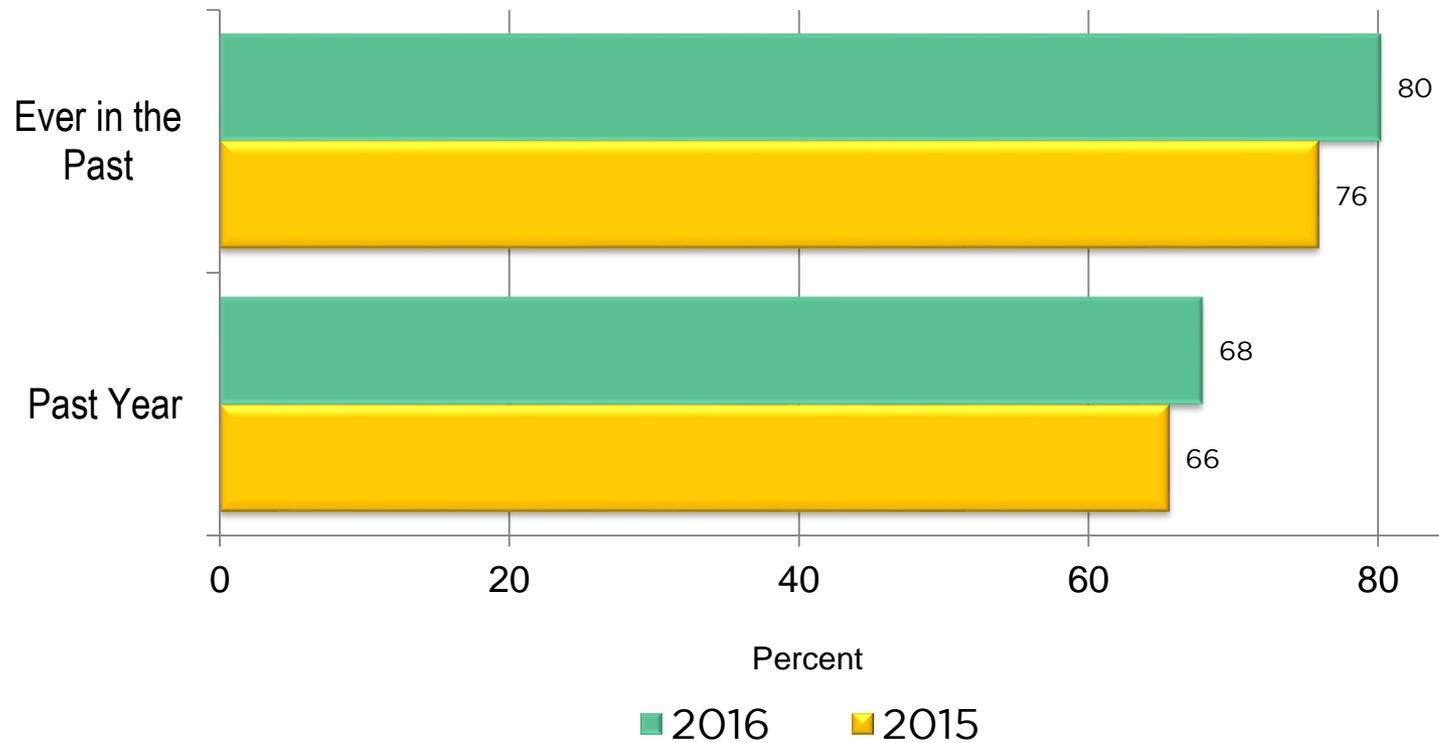


% Very Satisfied with Trip



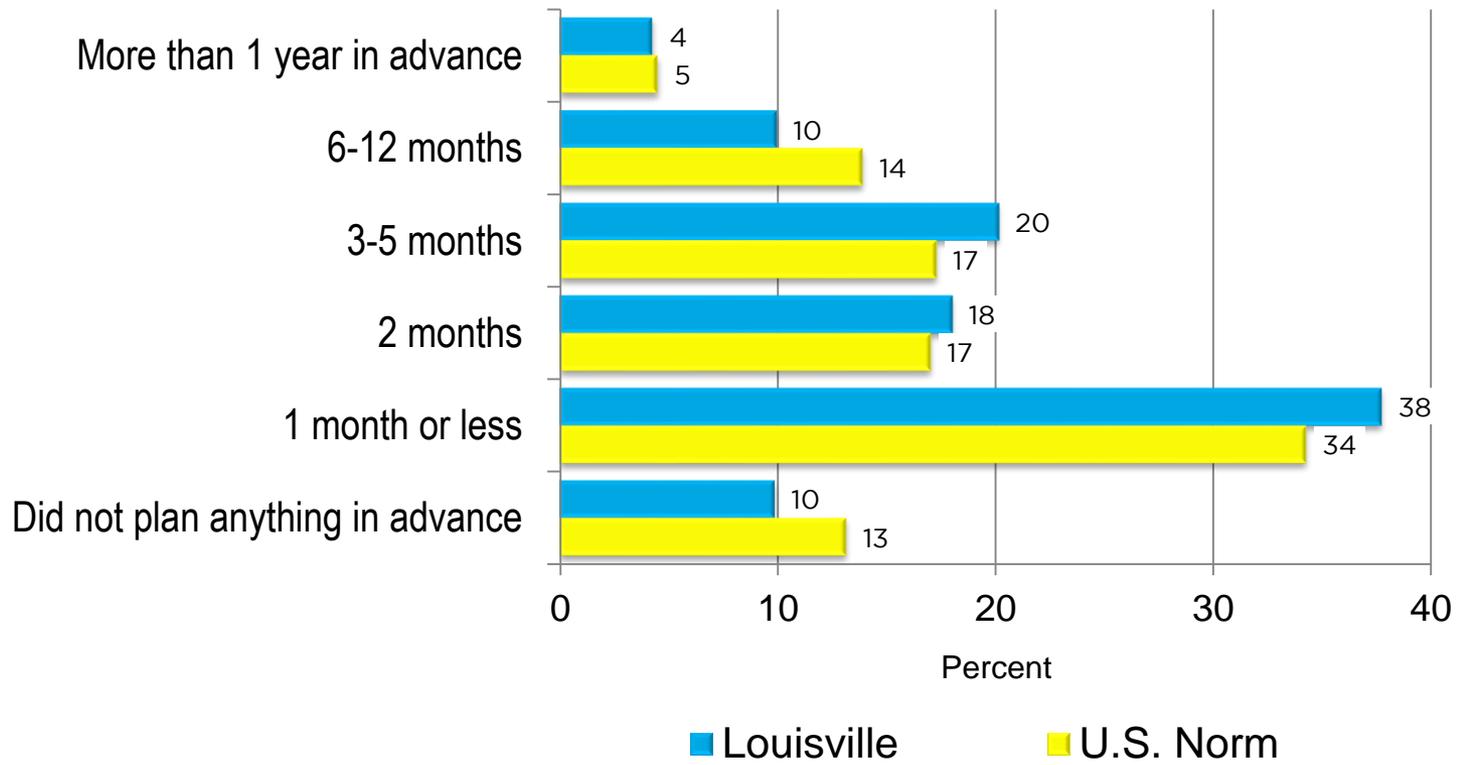
Past Visitation to Louisville

Base: Overnight Person-Trips

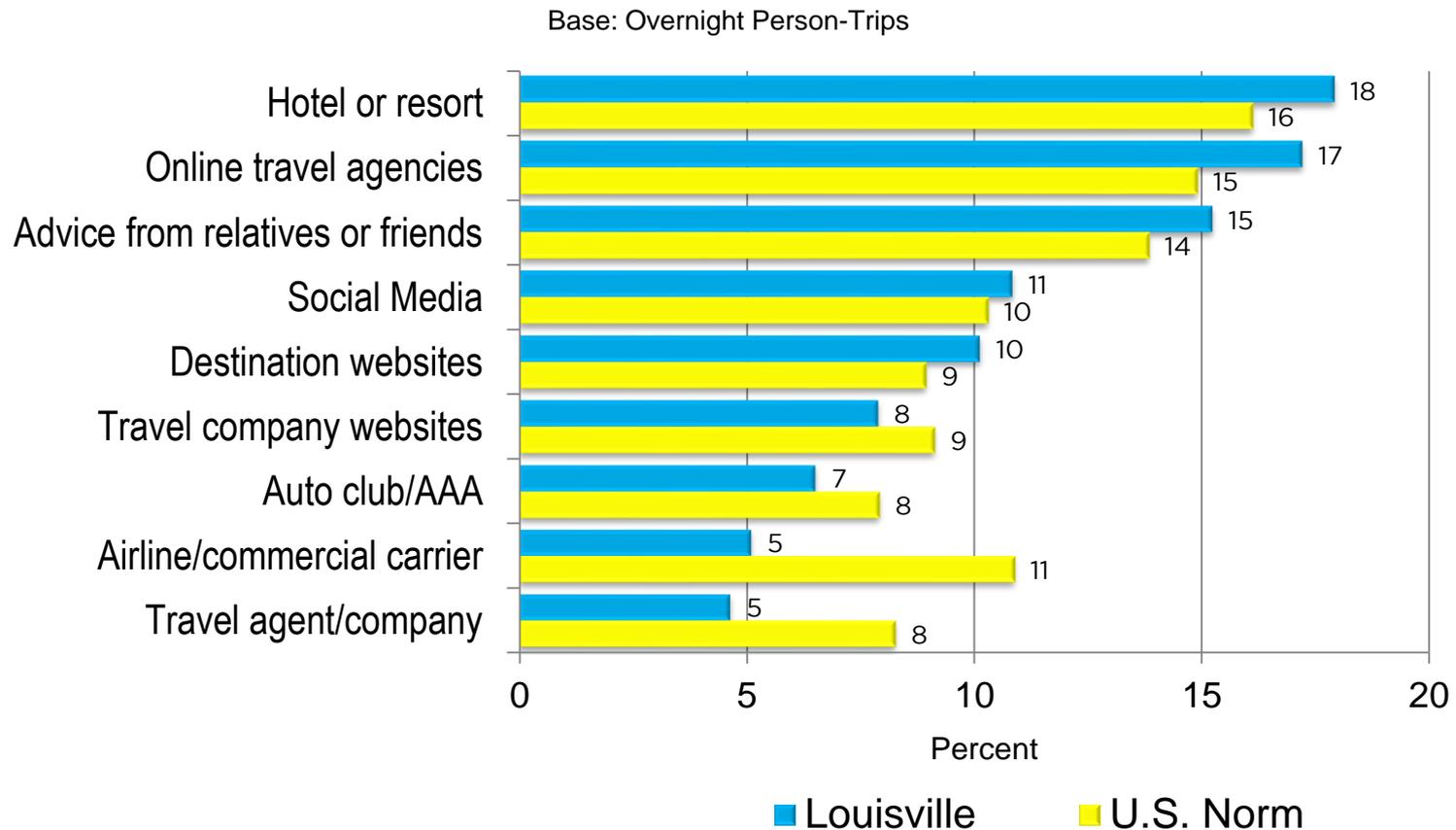


Length of Trip Planning

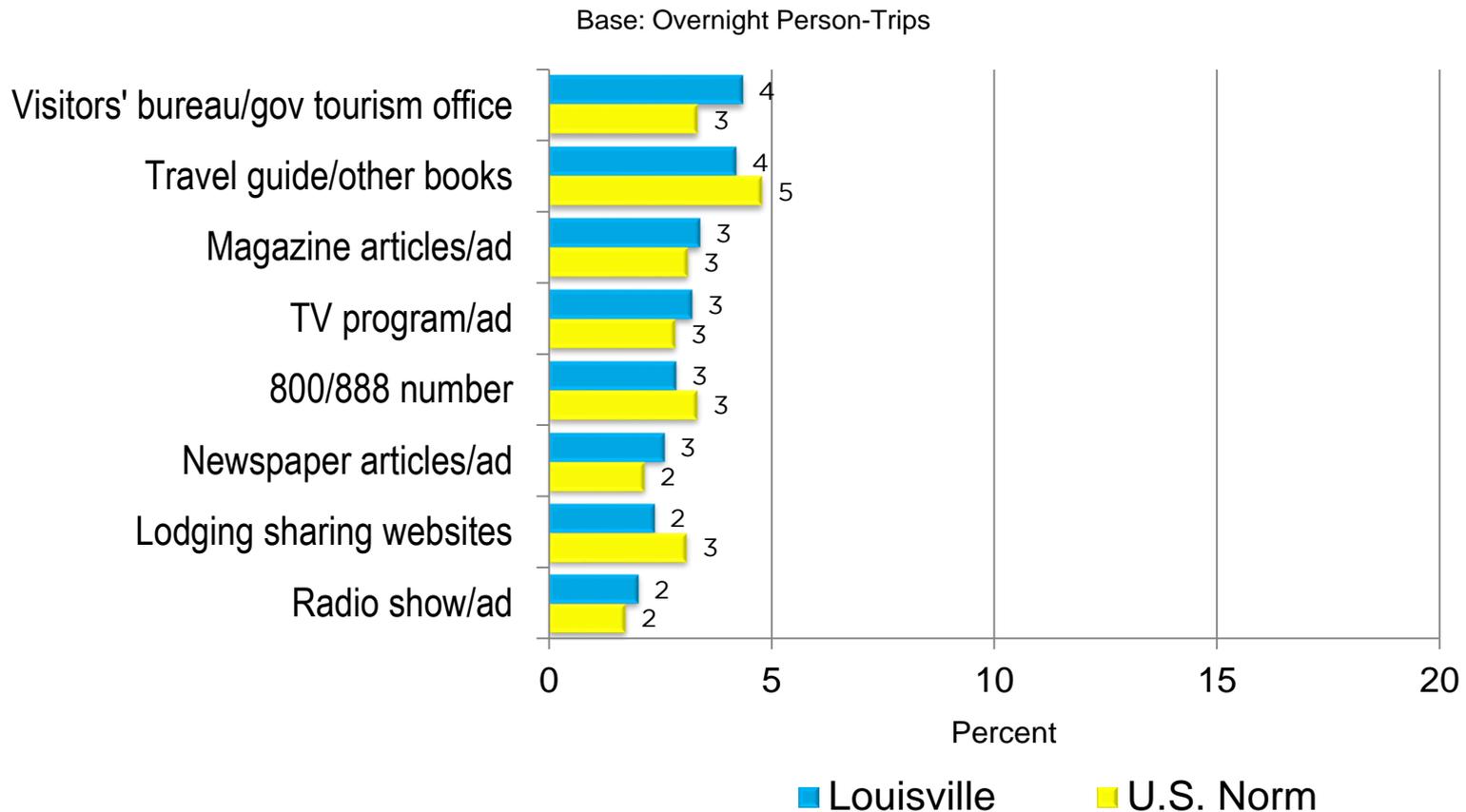
Base: Overnight Person-Trips



Trip Planning Information Sources

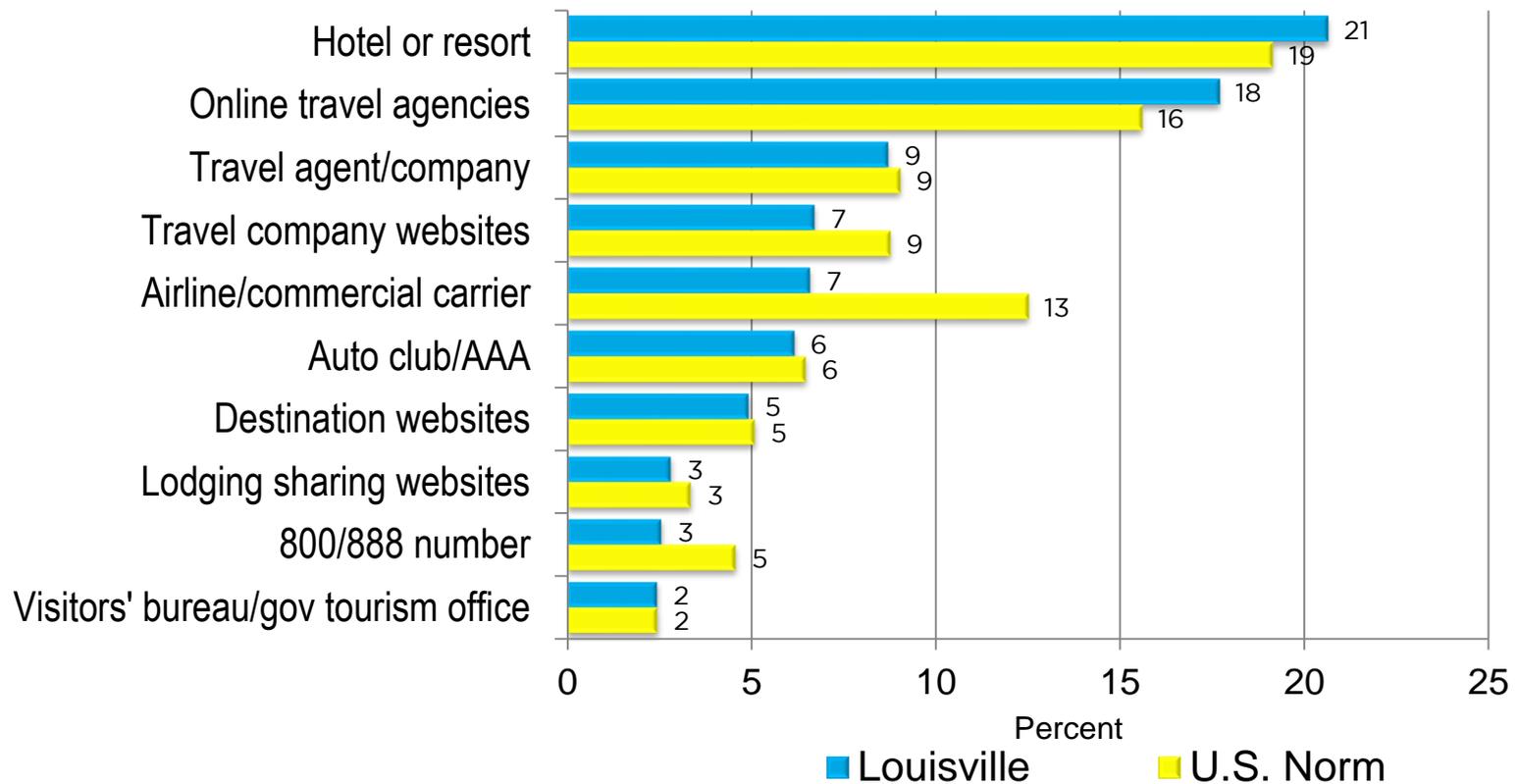


Trip Planning Information Sources (Cont'd)

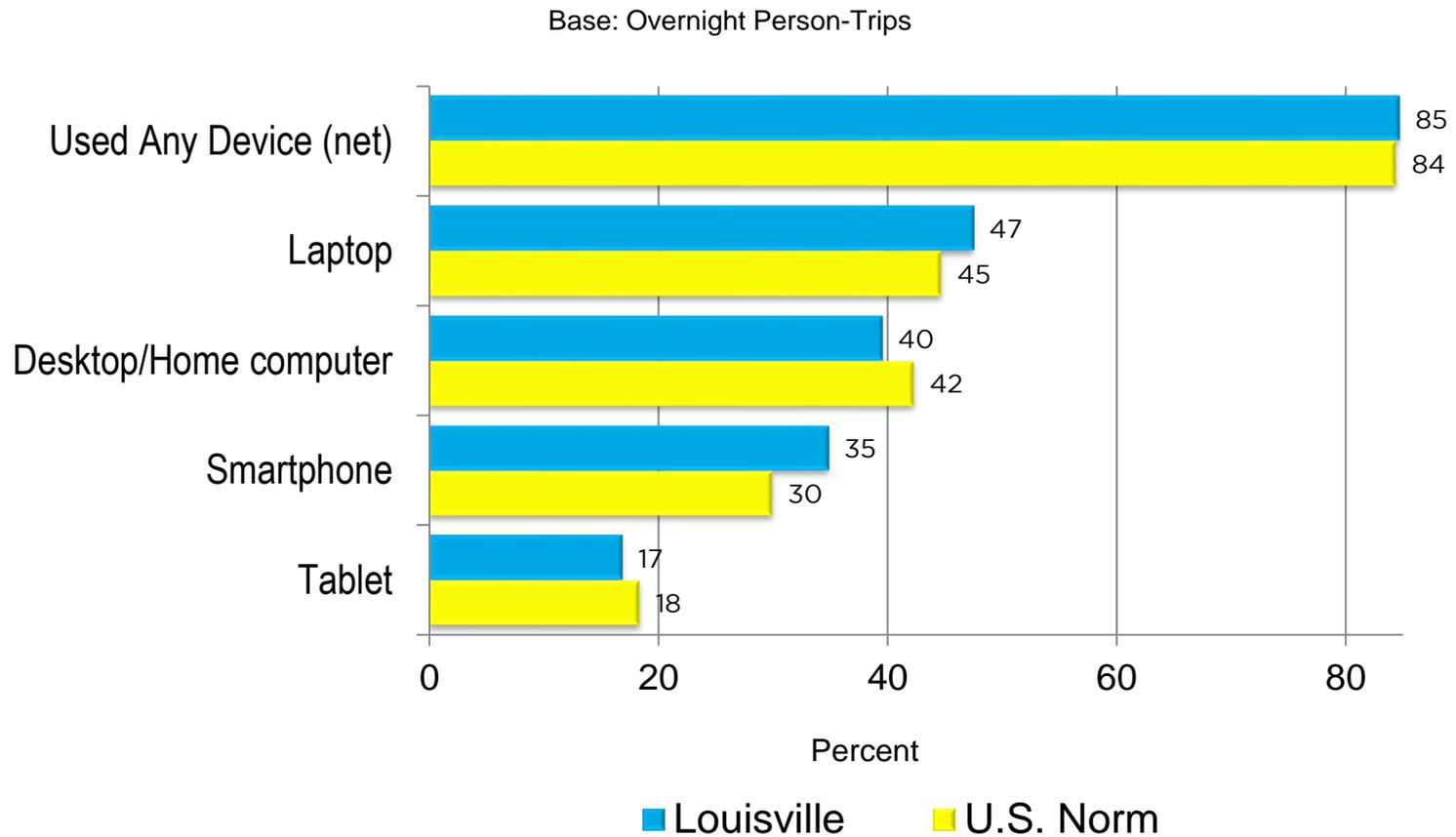


Method of Booking

Base: Overnight Person-Trips

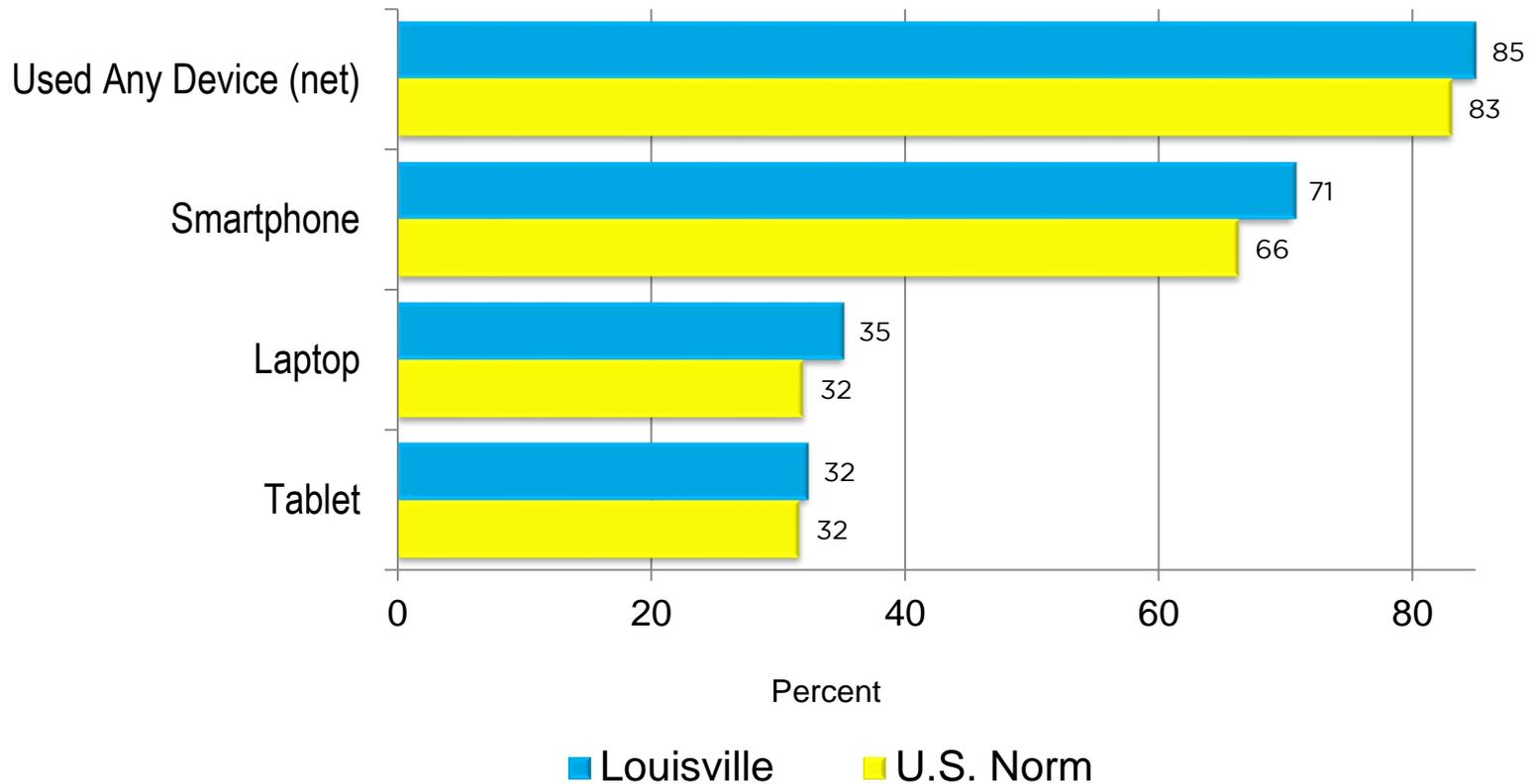


Devices Used for Trip Planning

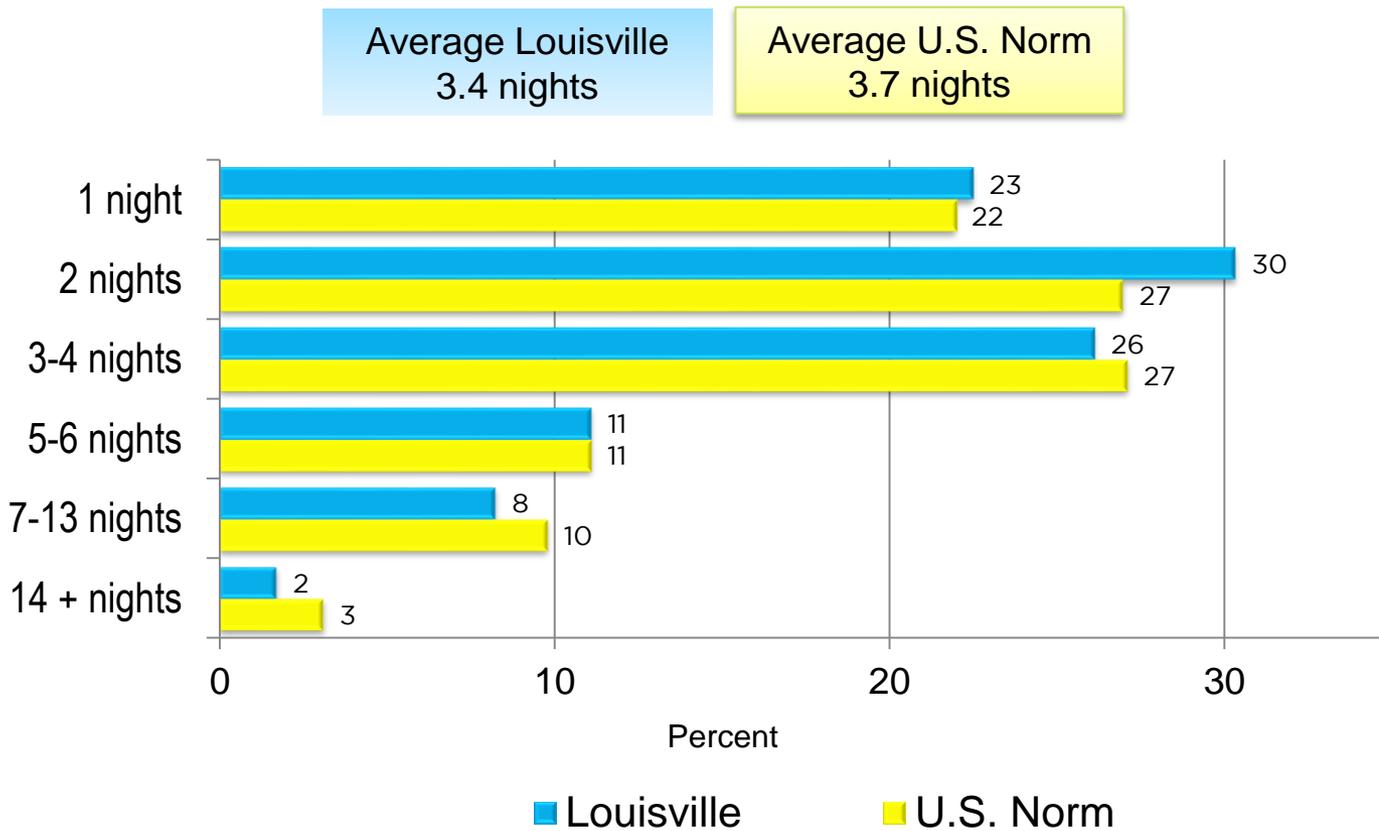


Devices Used During Trip

Base: Overnight Person-Trips



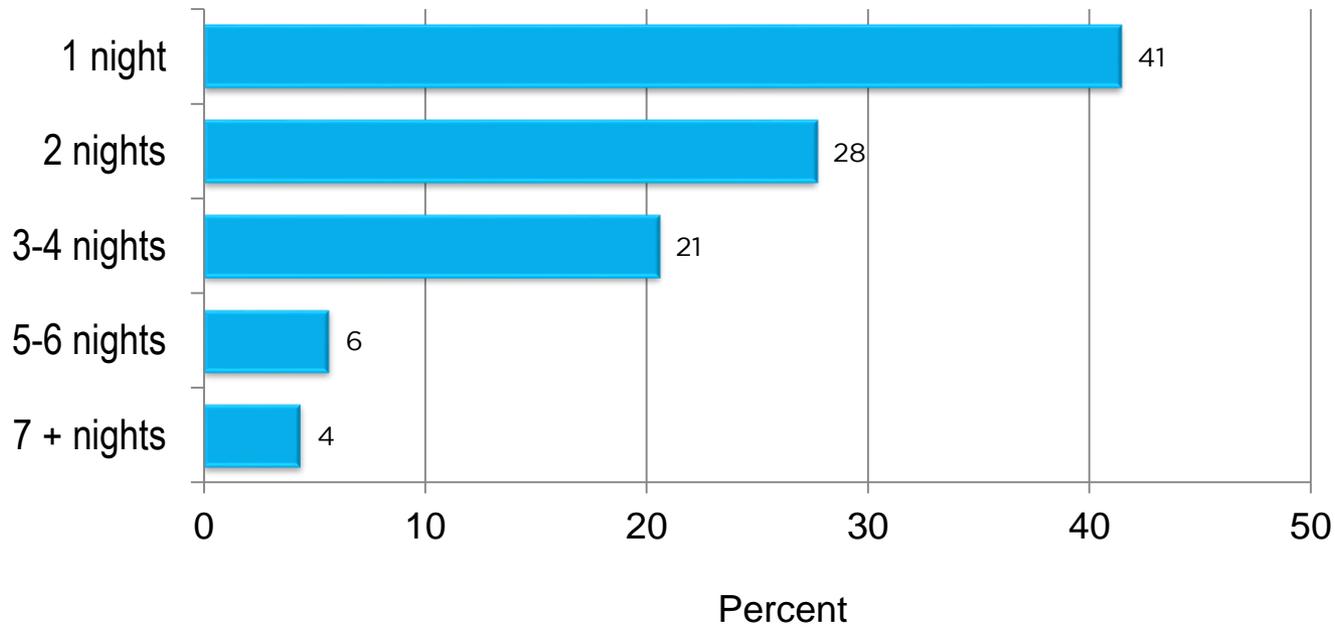
Total Nights Away on Trip



Number of Nights Spent in Louisville

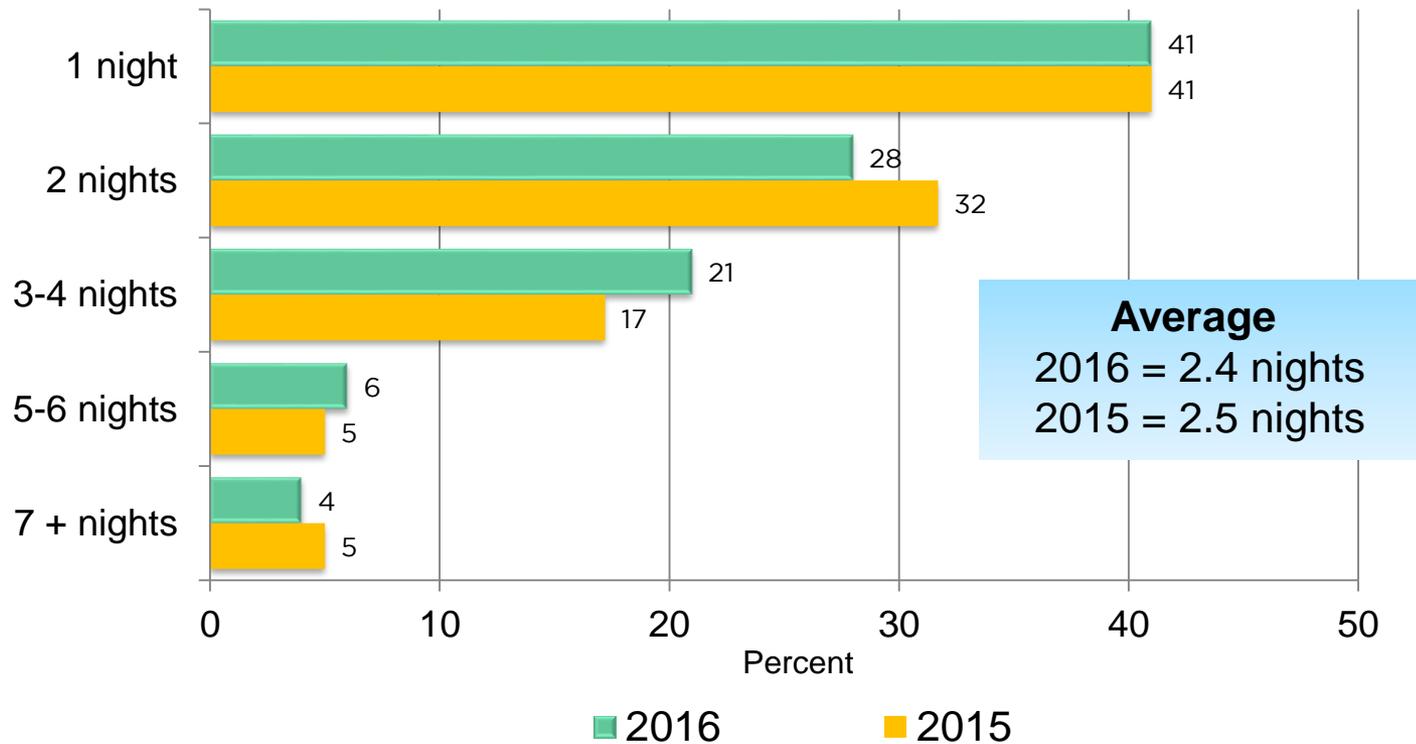
Base: Overnight Person-Trips with 1+ Nights Spent In Louisville

Average Nights Spent in Louisville = 2.4

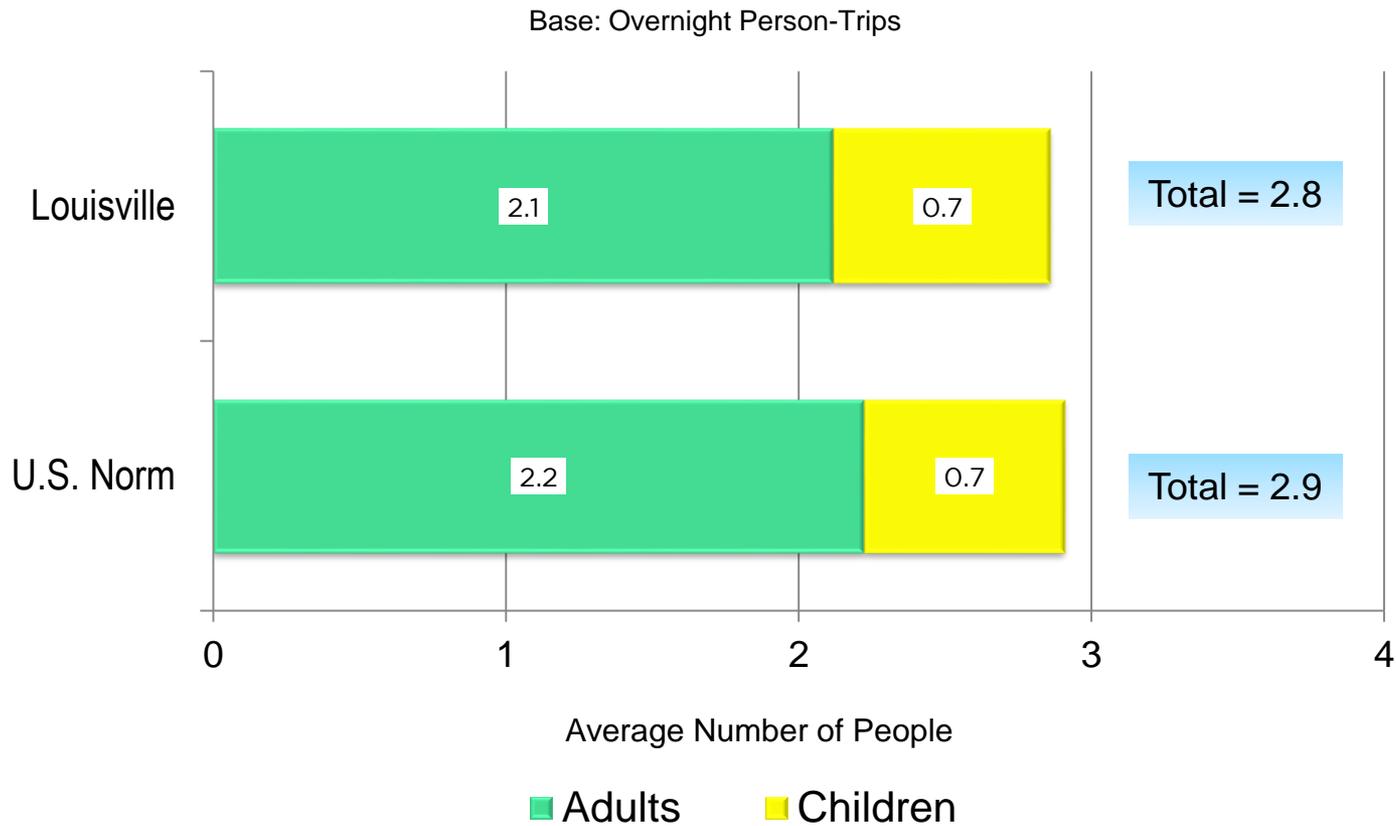


Number of Nights Spent in Louisville - 2016 vs. 2015

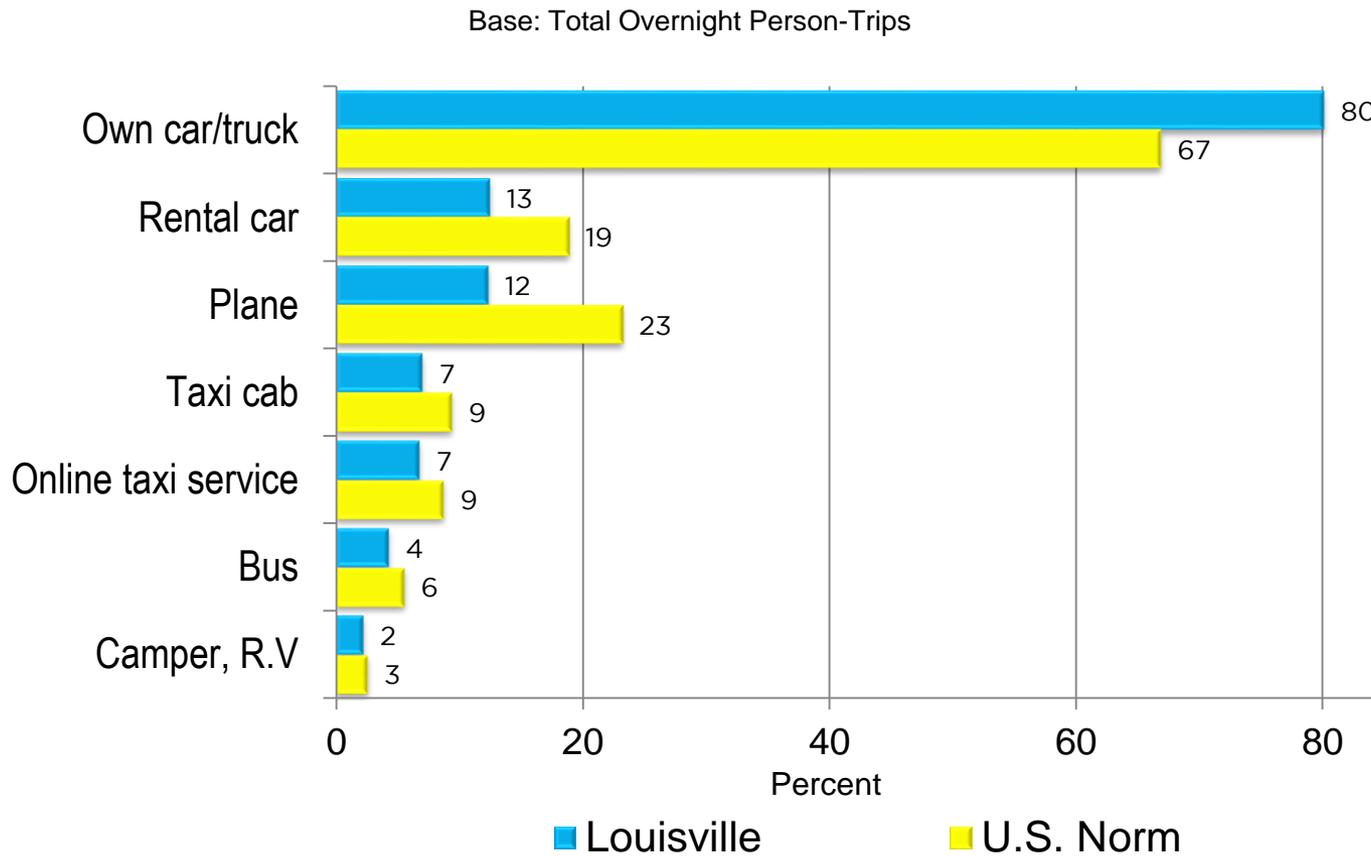
Base: Overnight Person-Trips with 1+ Nights Spent In Louisville



Size of Travel Party

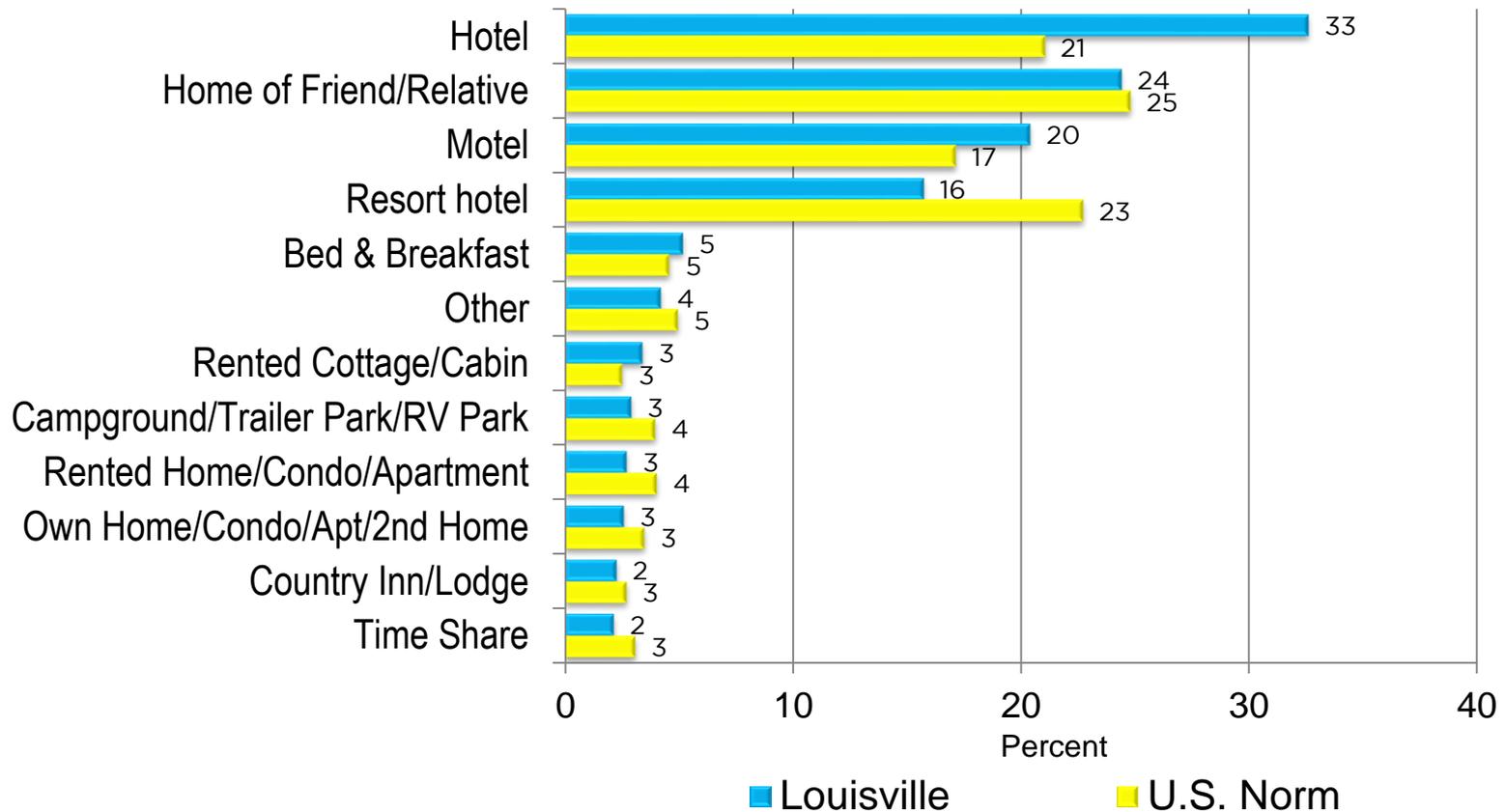


Transportation

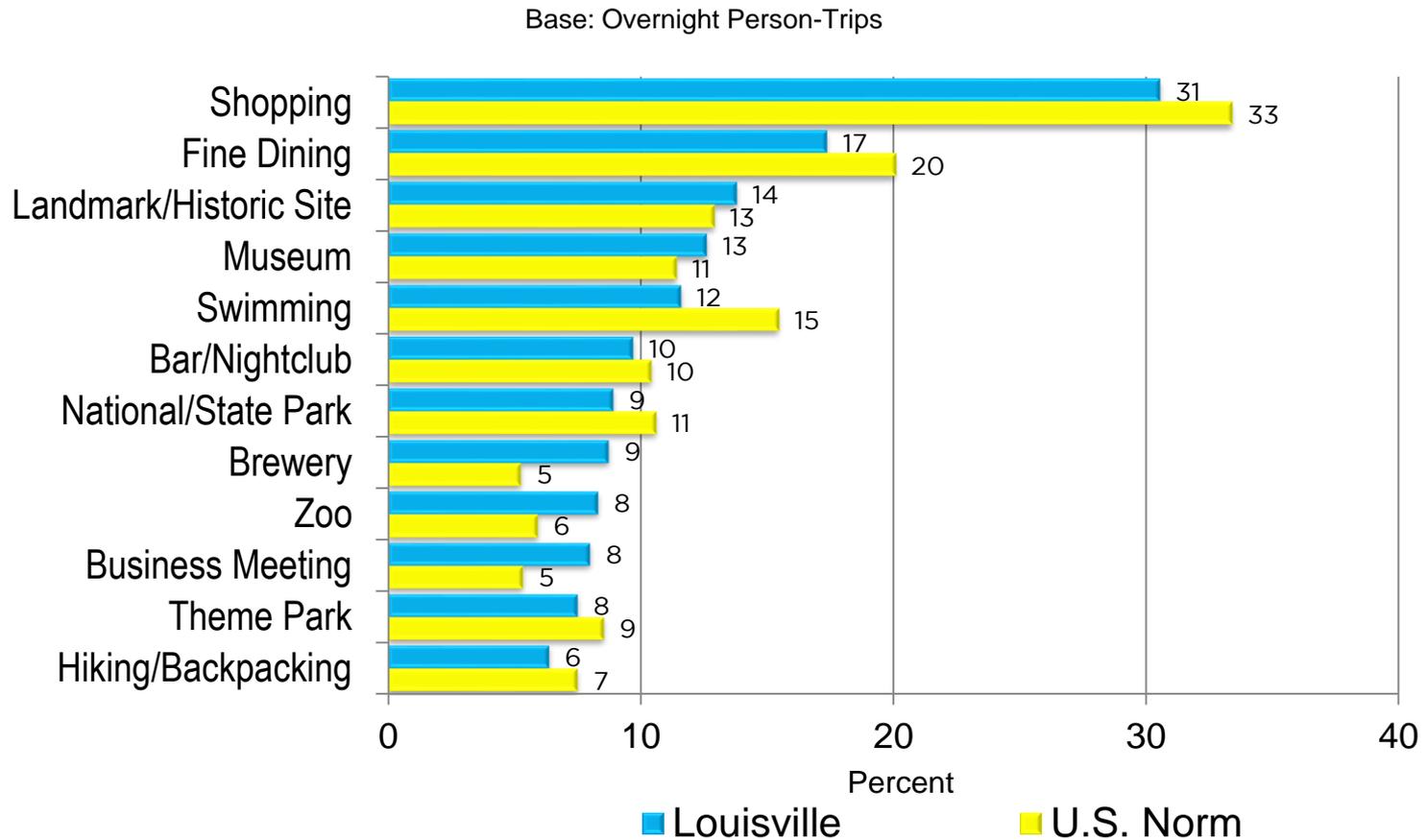


Accommodations

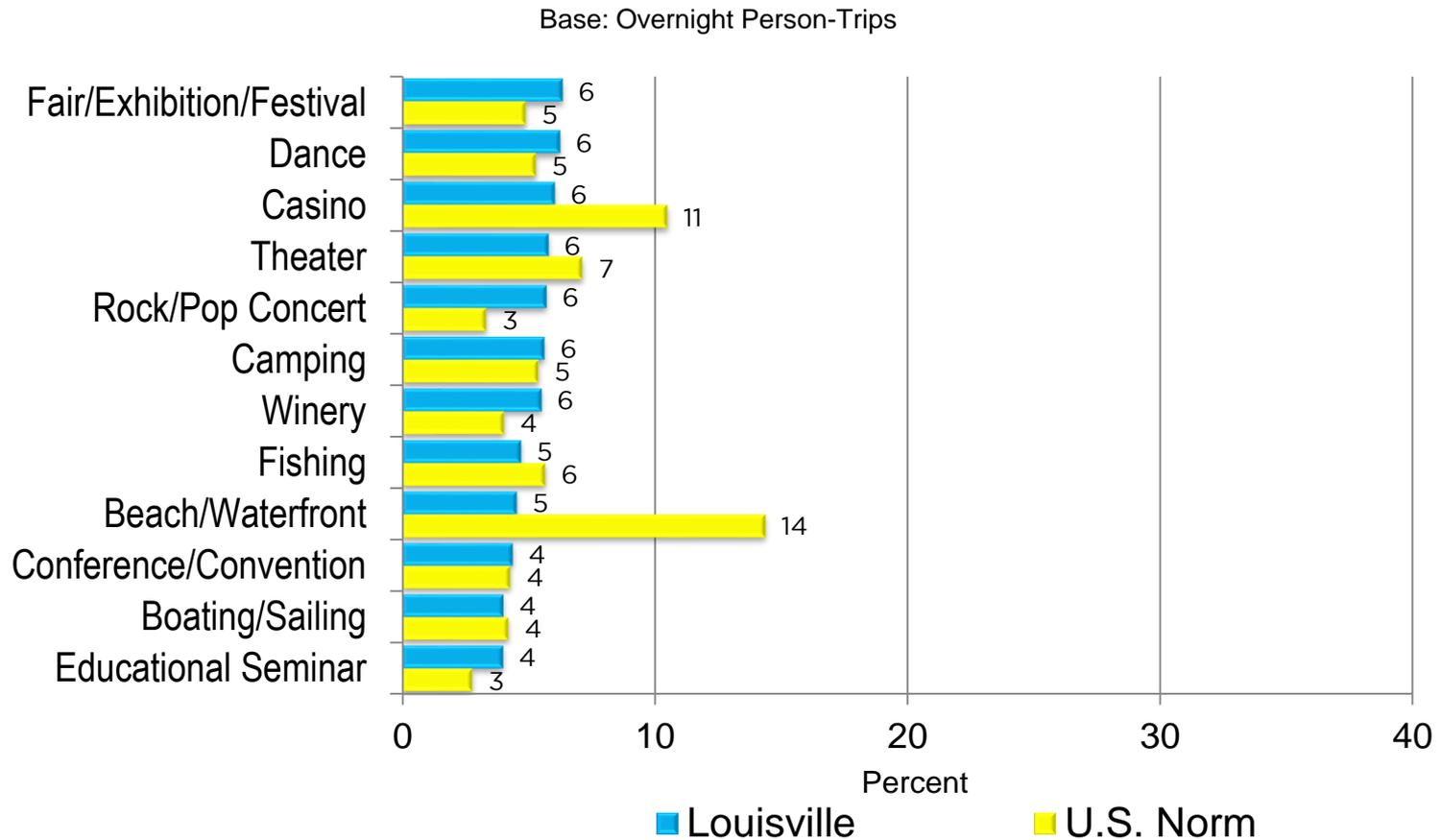
Base: Overnight Person-Trips



Activities and Experiences

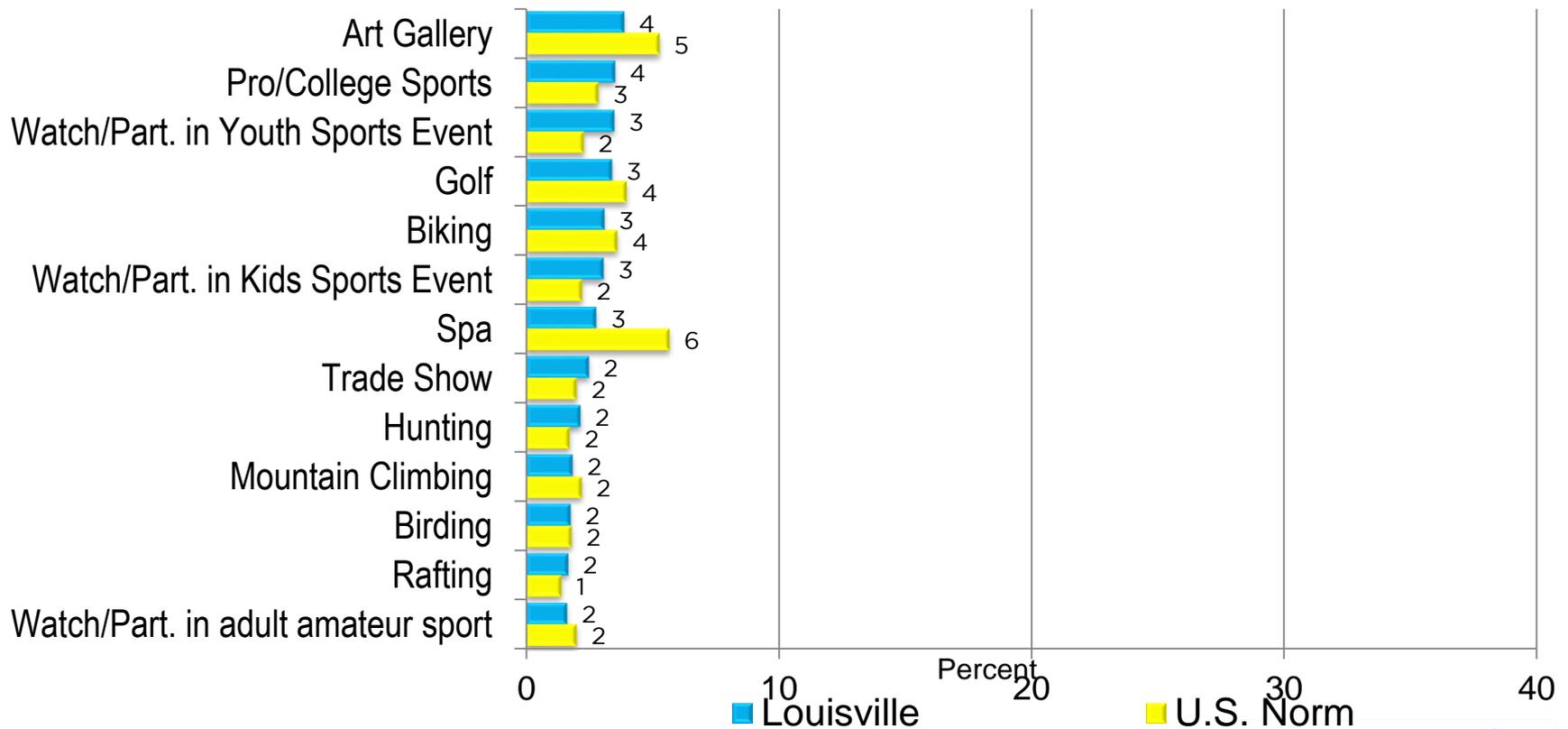


Activities and Experiences (Cont'd)

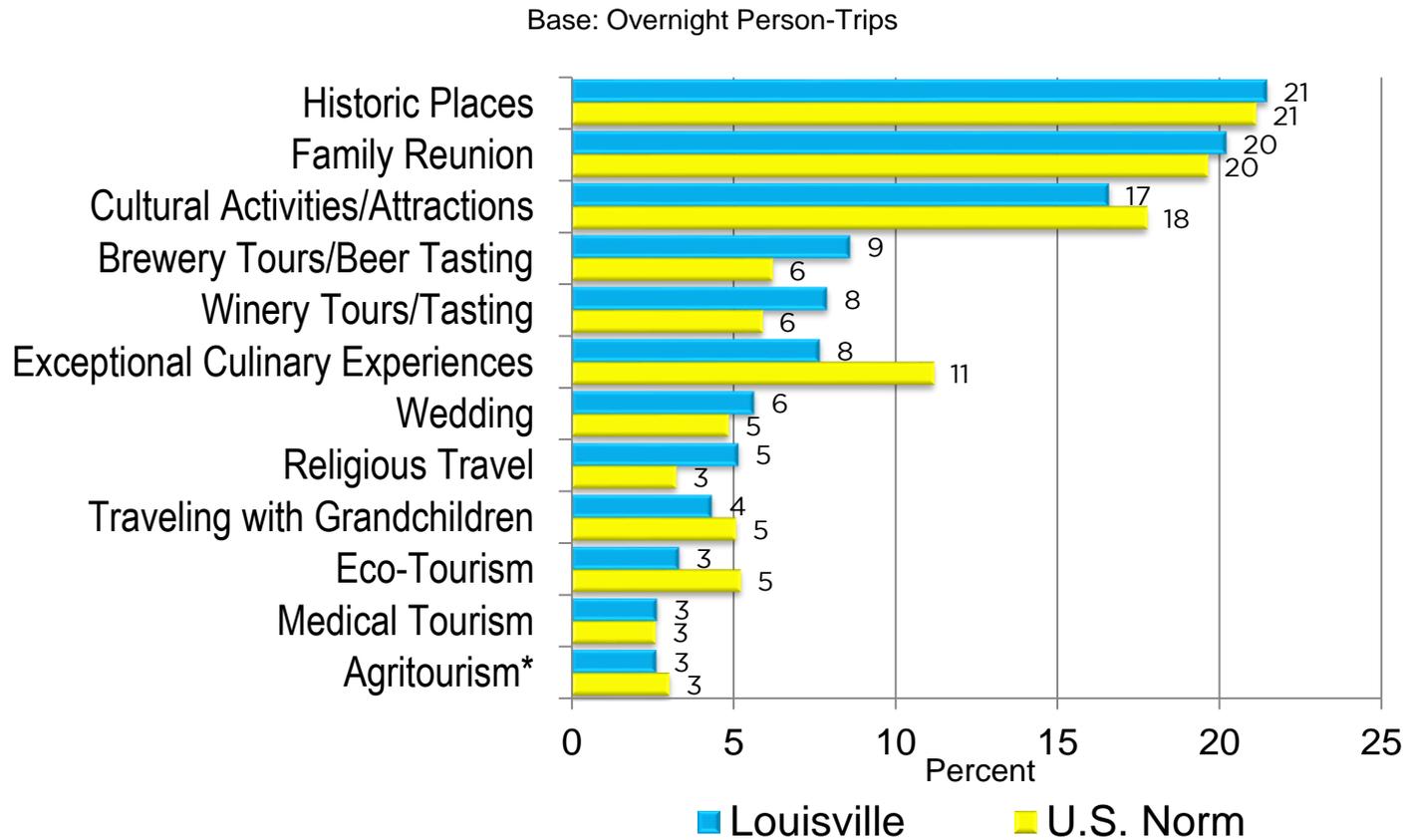


Activities and Experiences (Cont'd)

Base: Overnight Person-Trips

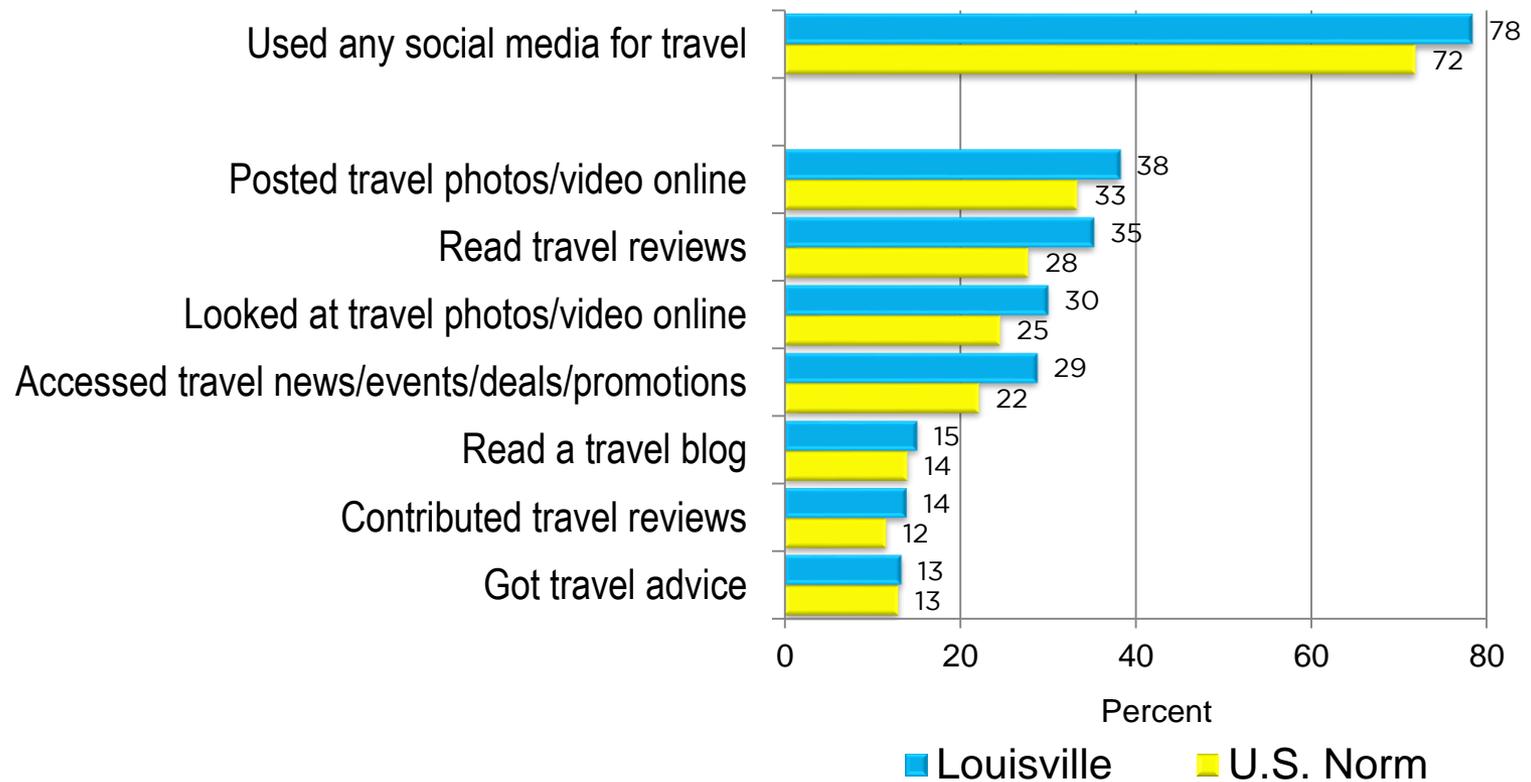


Activities of Special Interest



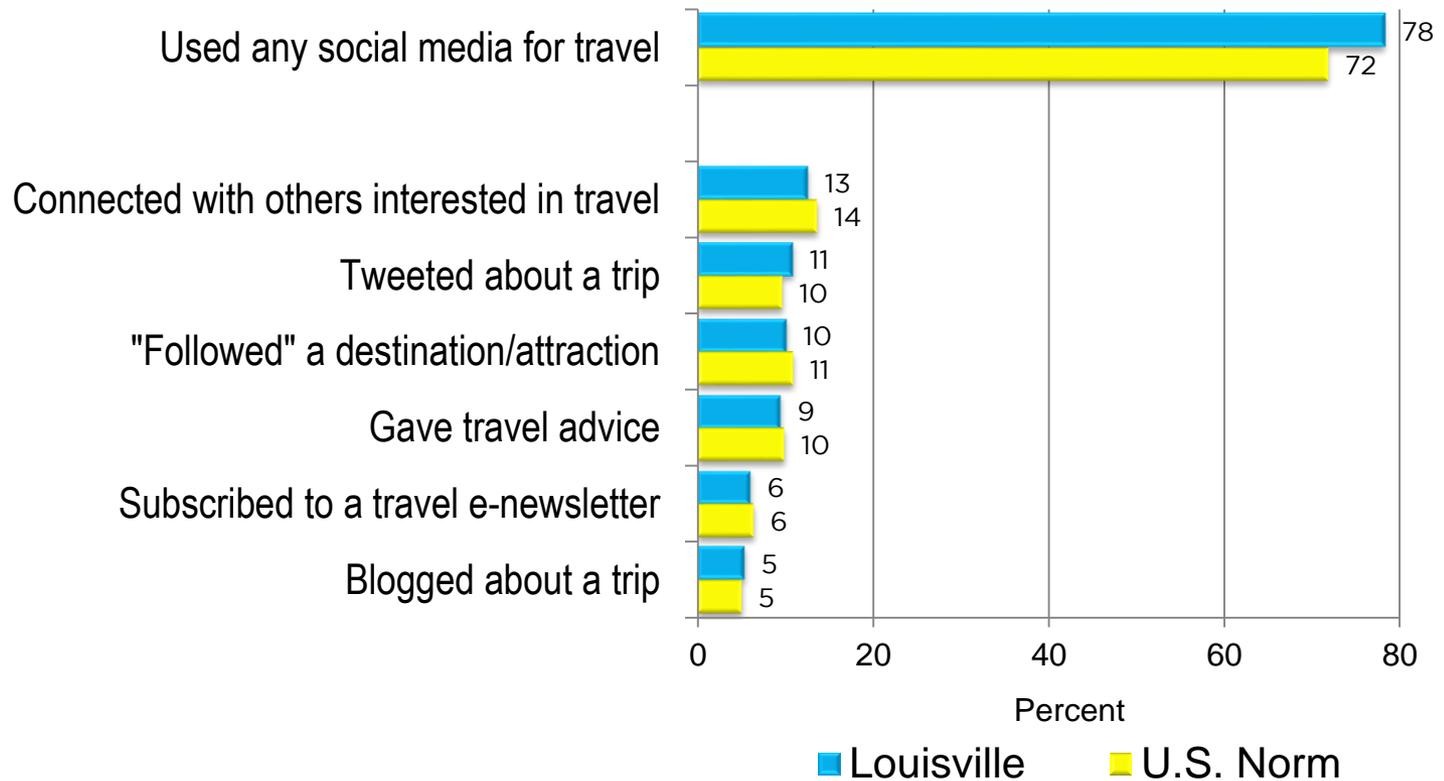
Online Social Media Use by Travelers

Base: Overnight Person-Trips



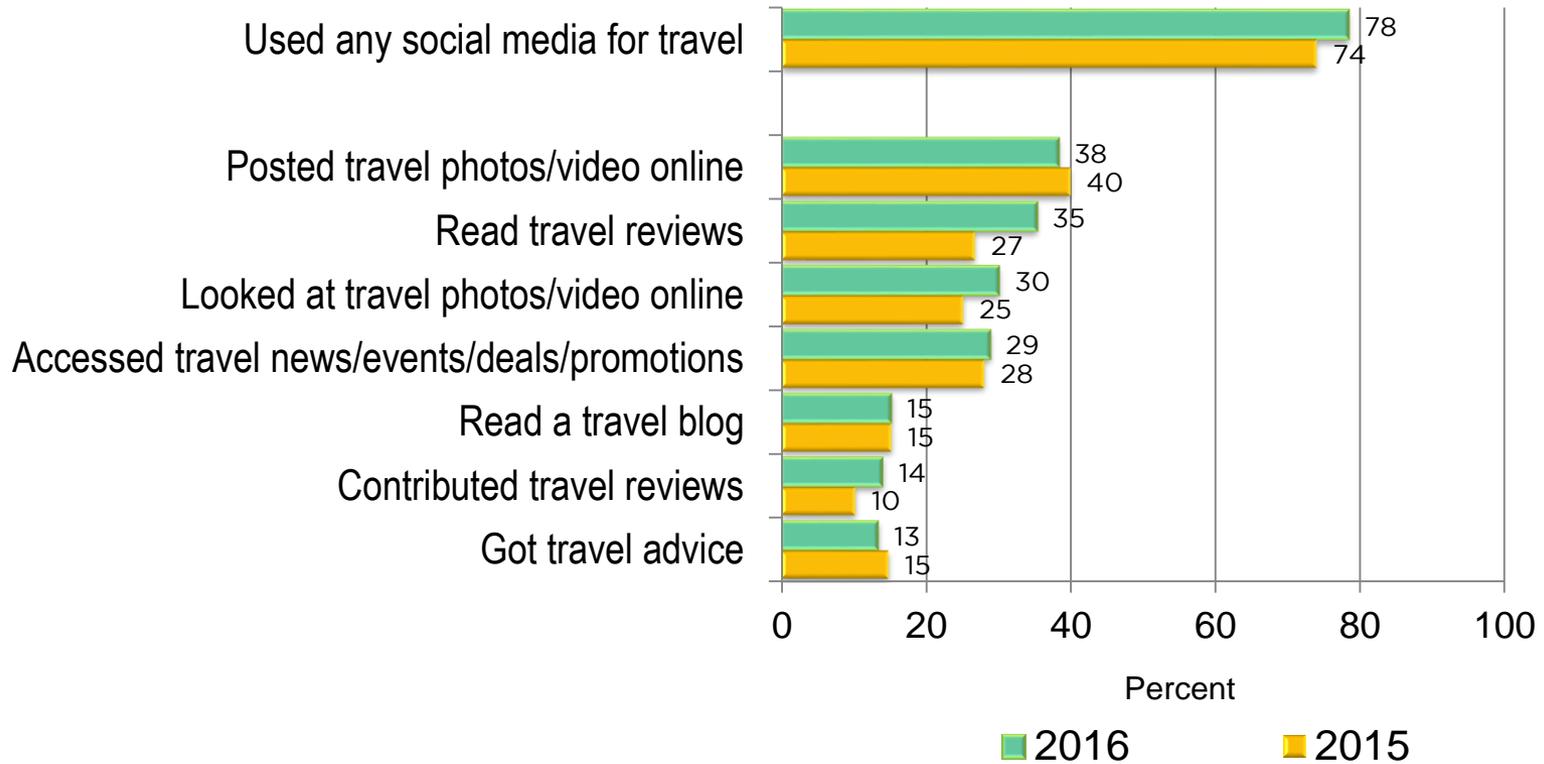
Online Social Media Use by Travelers (Cont'd)

Base: Overnight Person-Trips



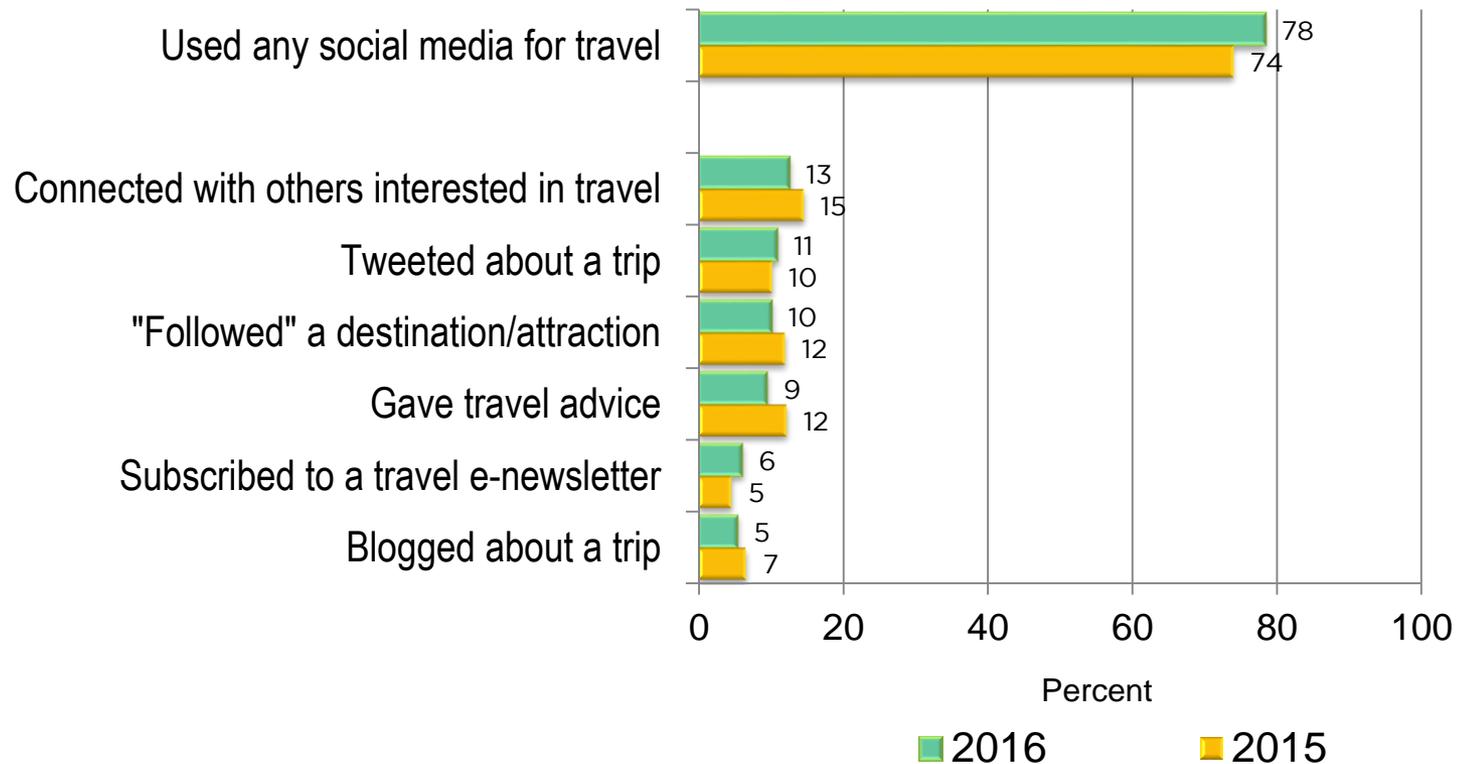
Online Social Media Use by Travelers – 2016 vs. 2015

Base: Overnight Person-Trips

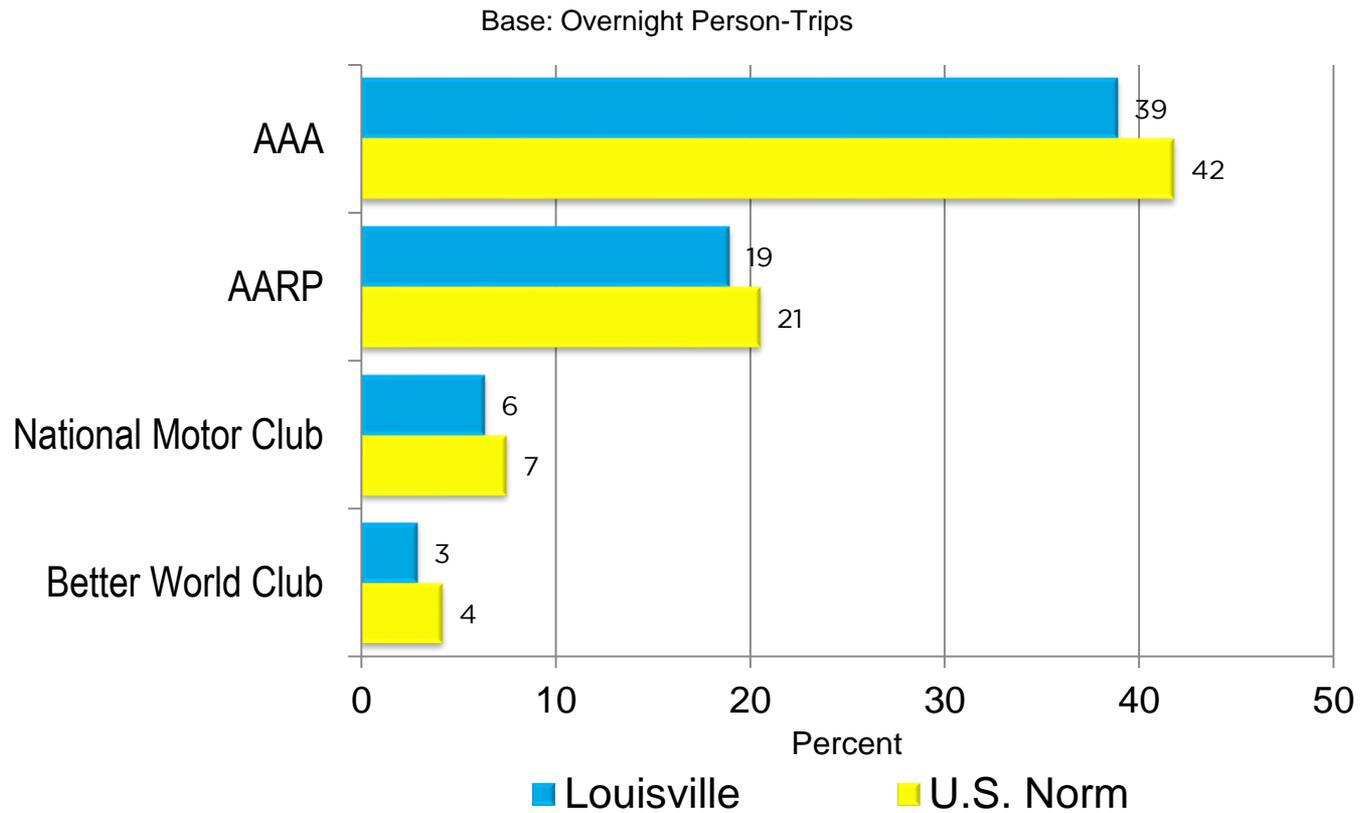


Online Social Media Use by Travelers – 2016 vs. 2015 (Cont'd)

Base: Overnight Person-Trips



Organization Membership

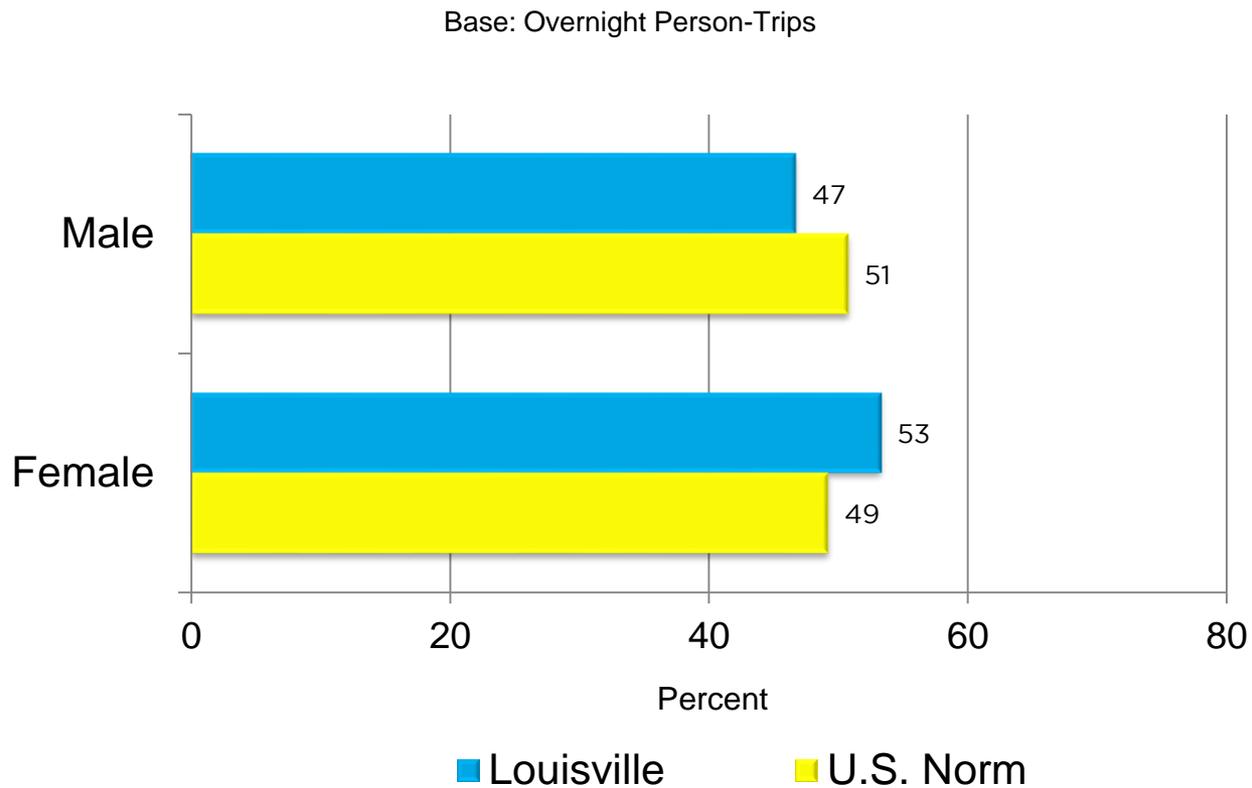




Demographic Profile of Overnight Visitors



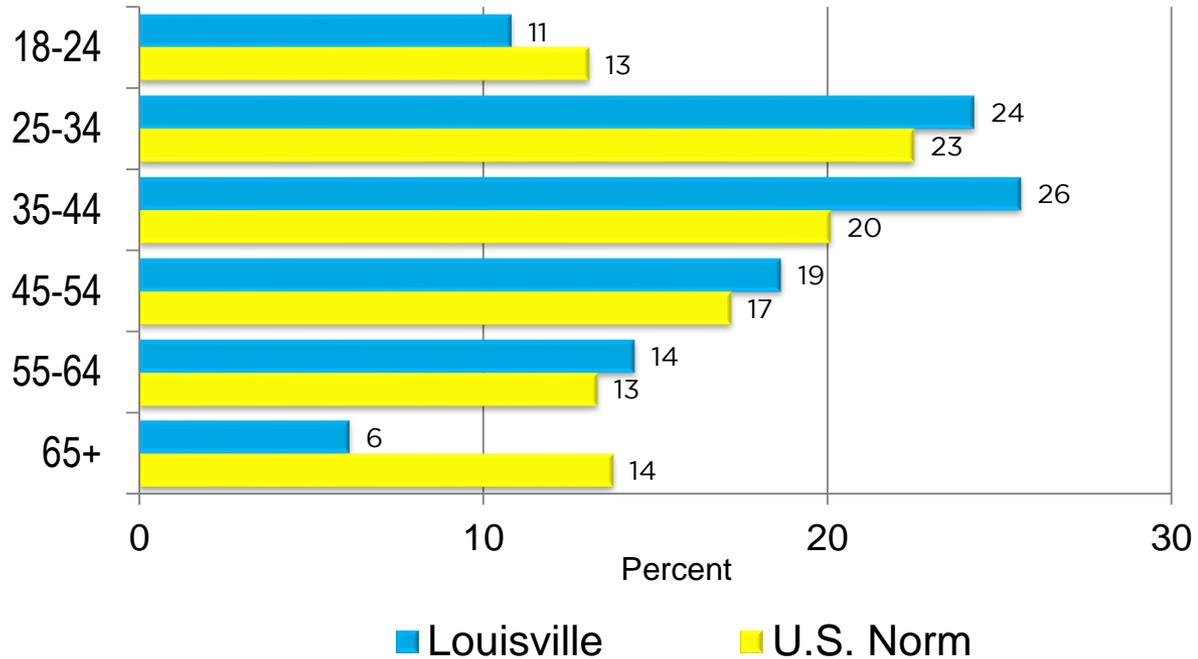
Gender



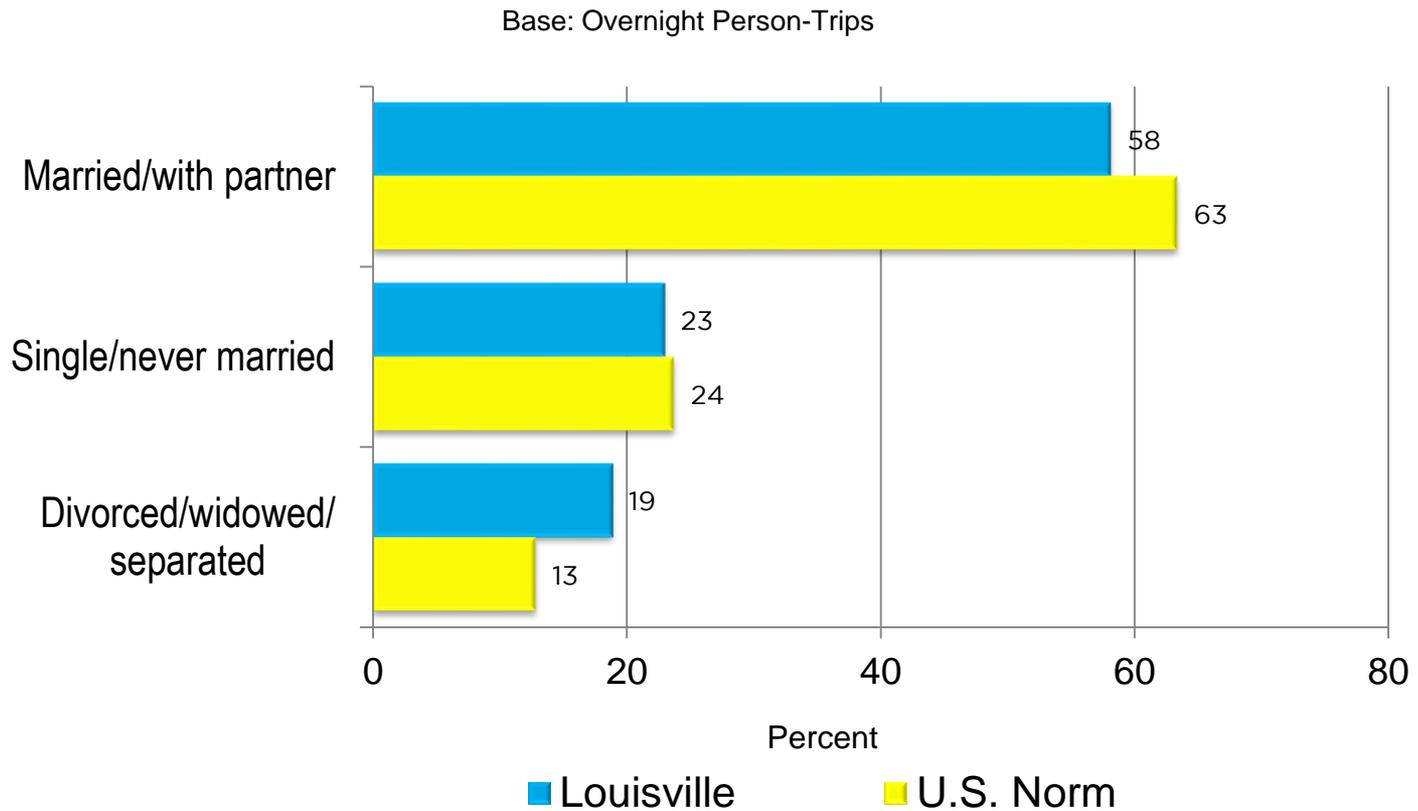
Age

Base: Overnight Person-Trips

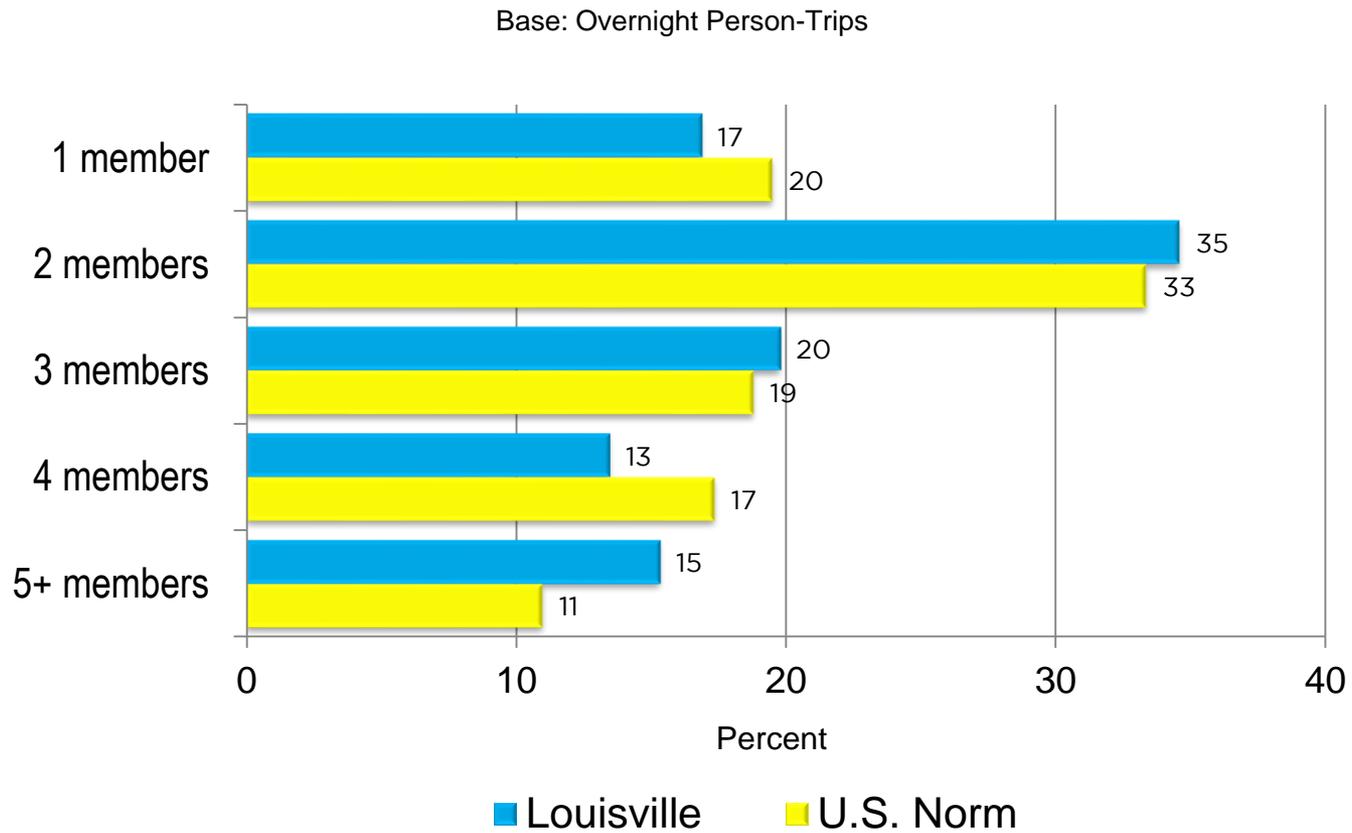
Average Louisville = 42.1 Average U.S. Norm = 43.8



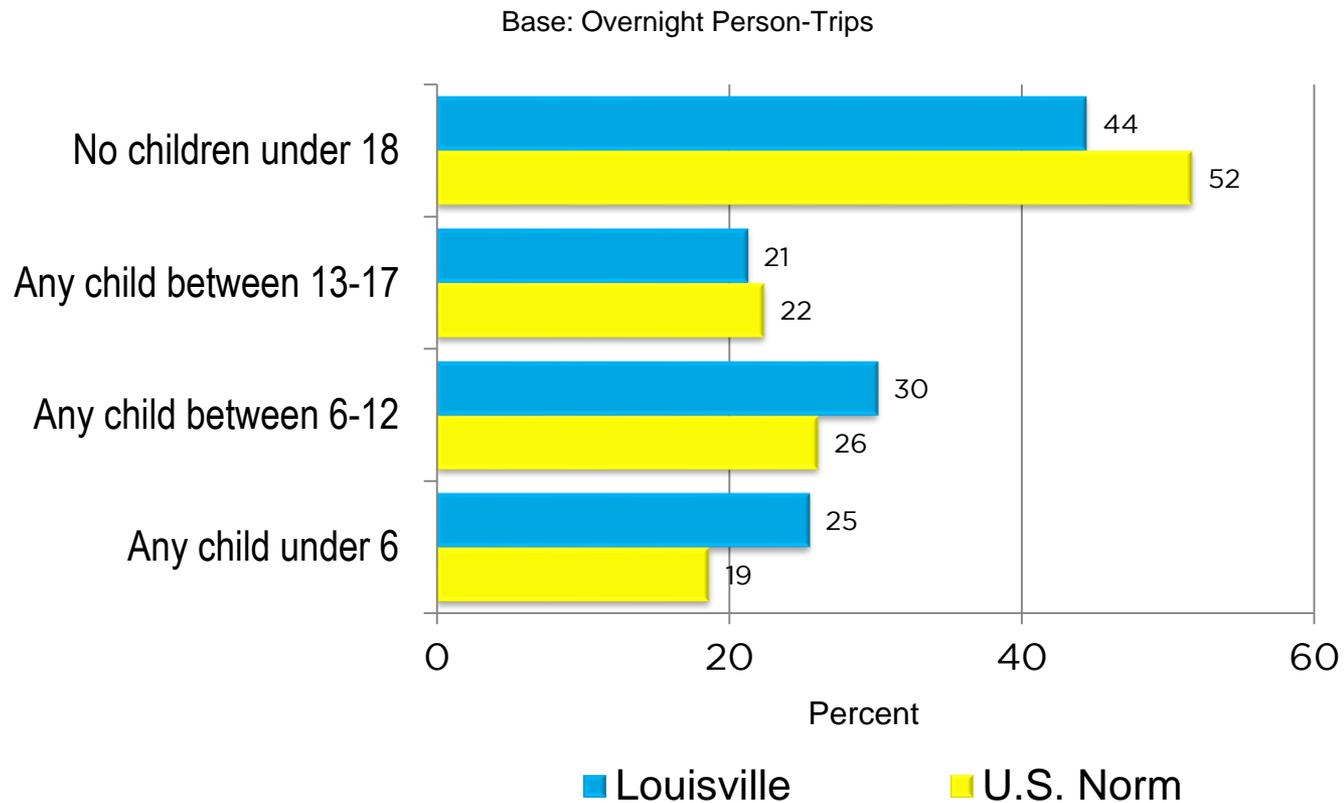
Marital Status



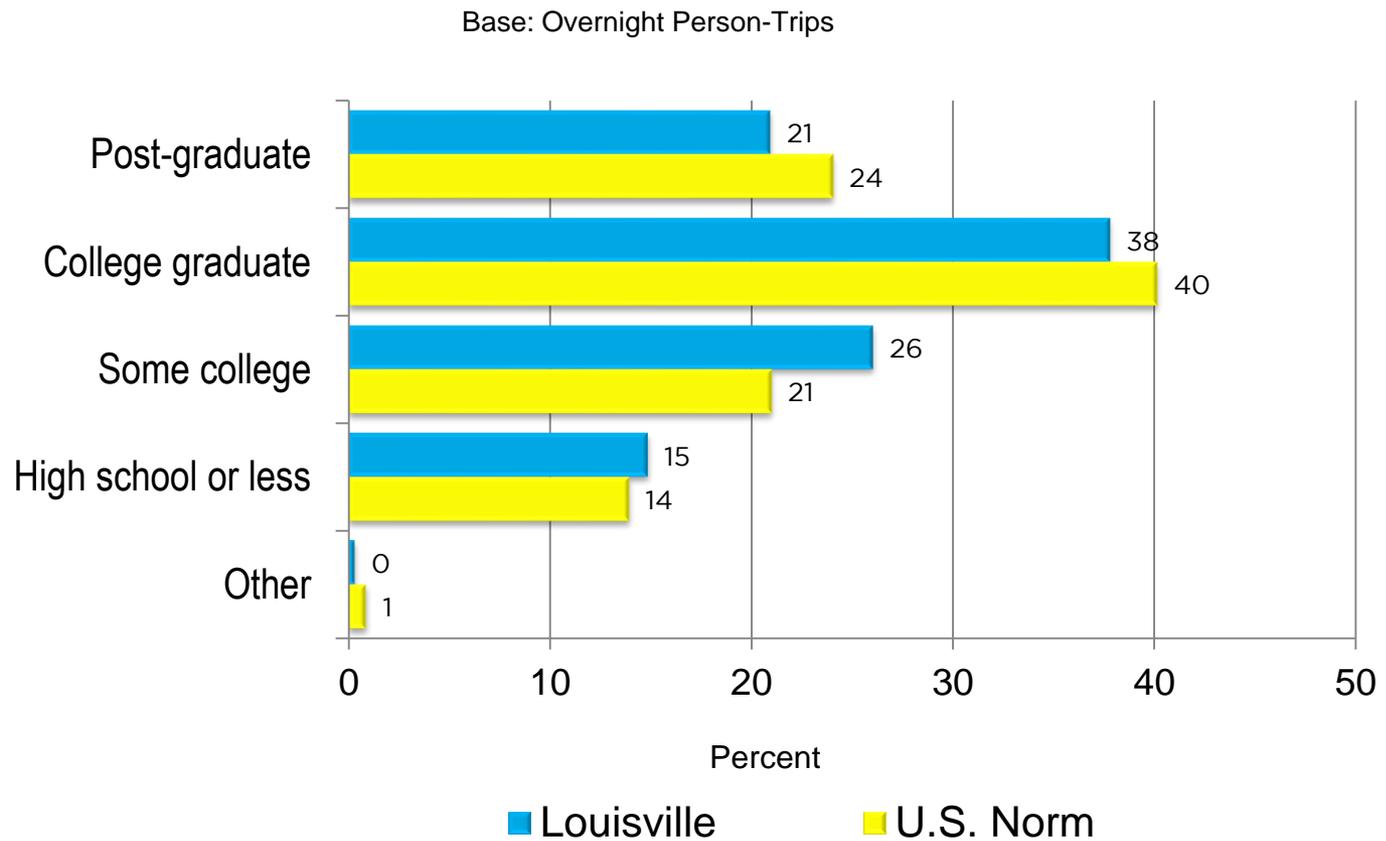
Household Size



Children in Household

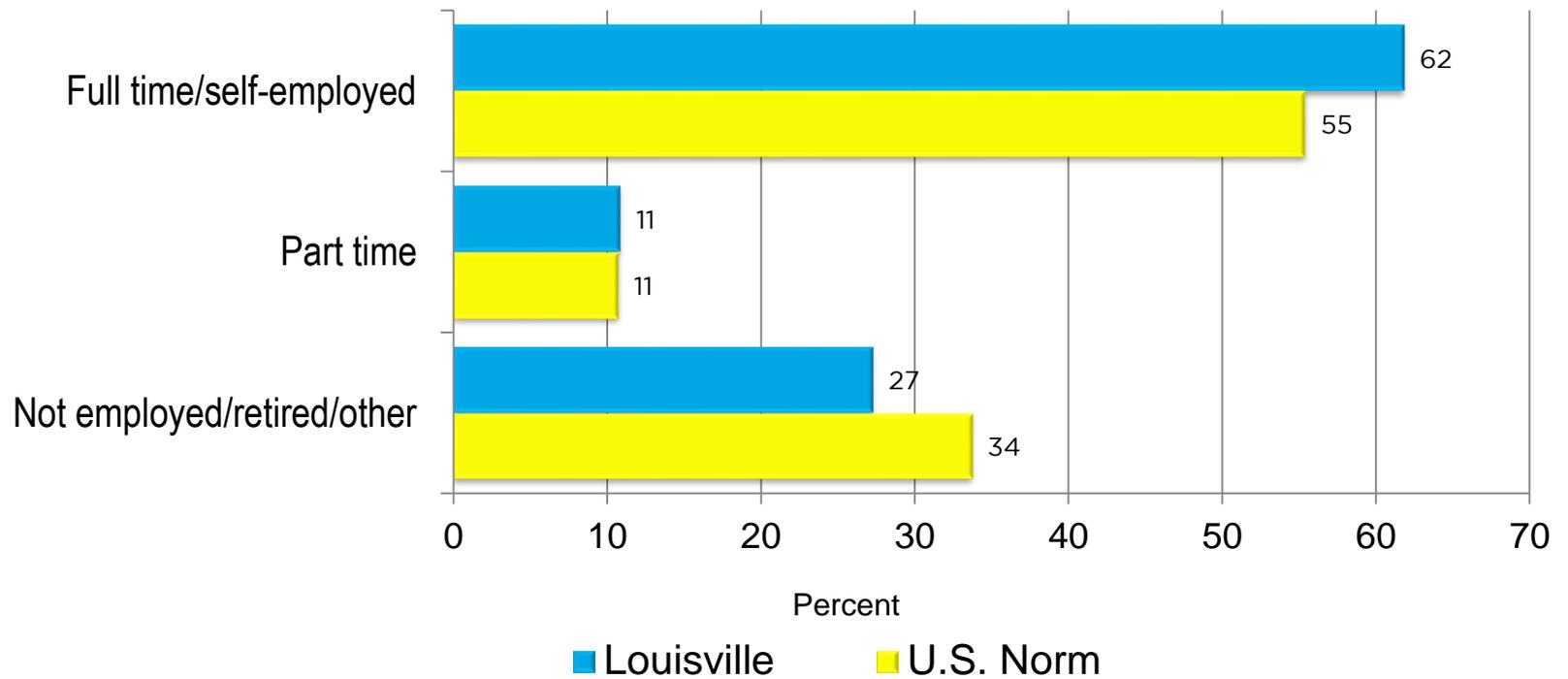


Education

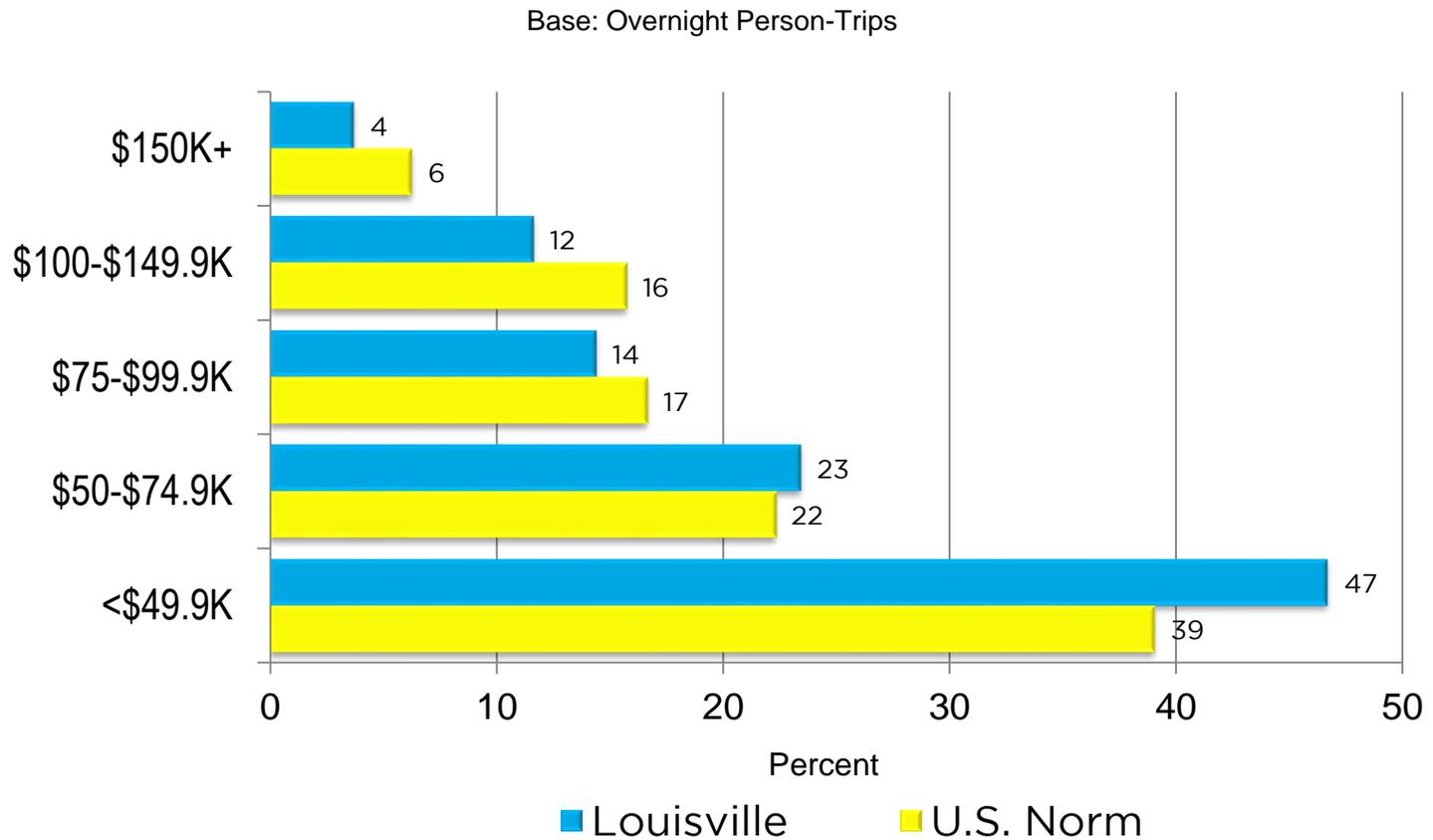


Employment

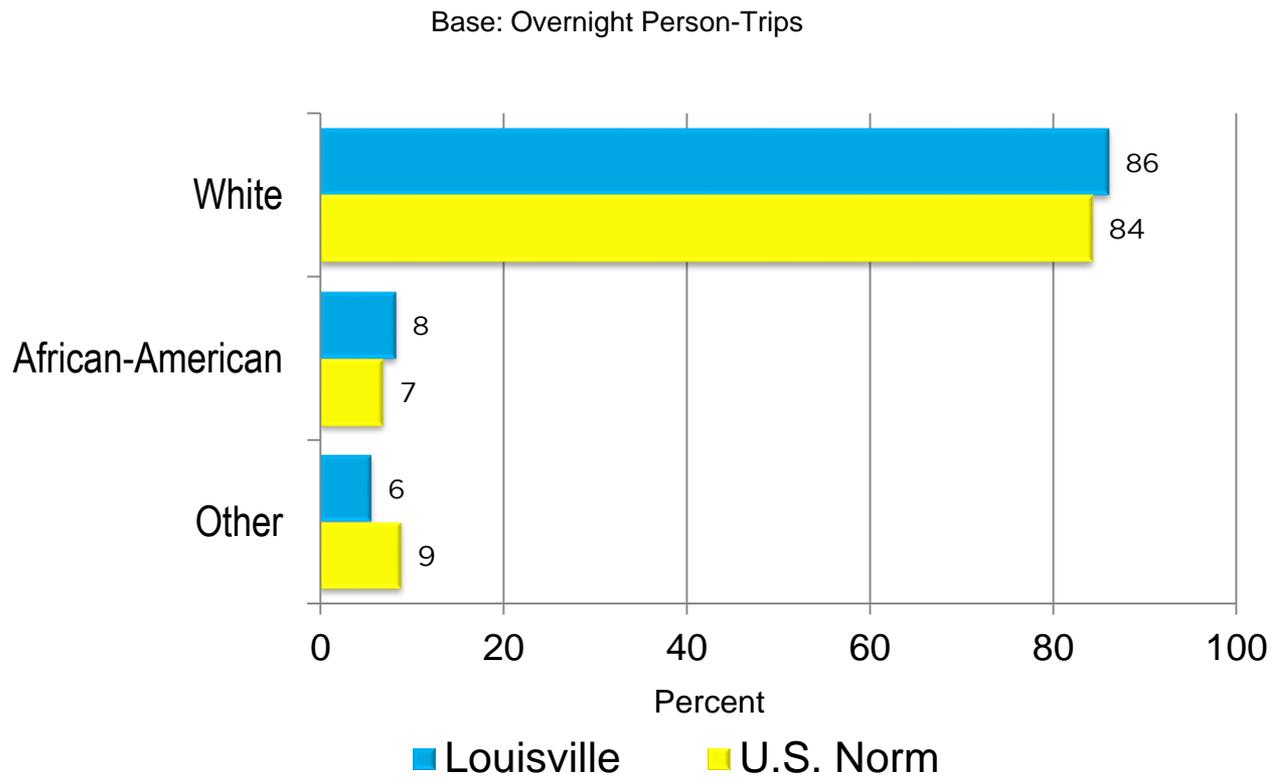
Base: Overnight Person-Trips



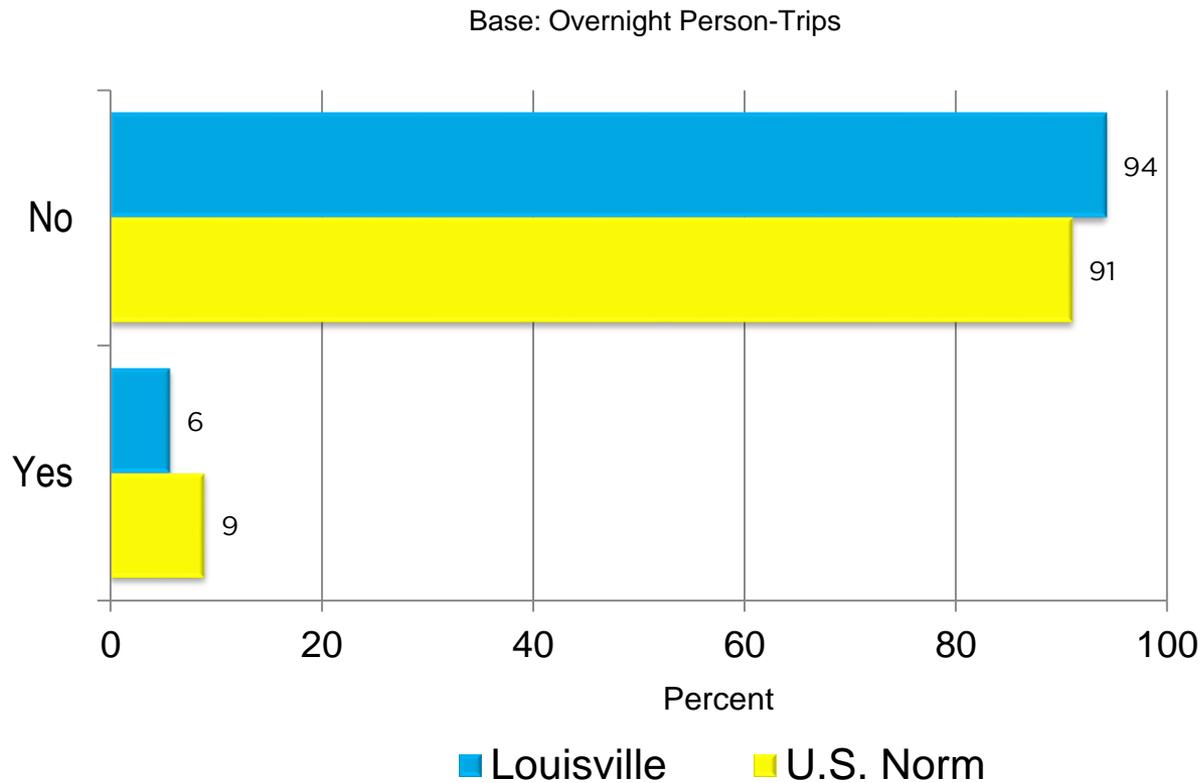
Household Income



Race



Hispanic Background





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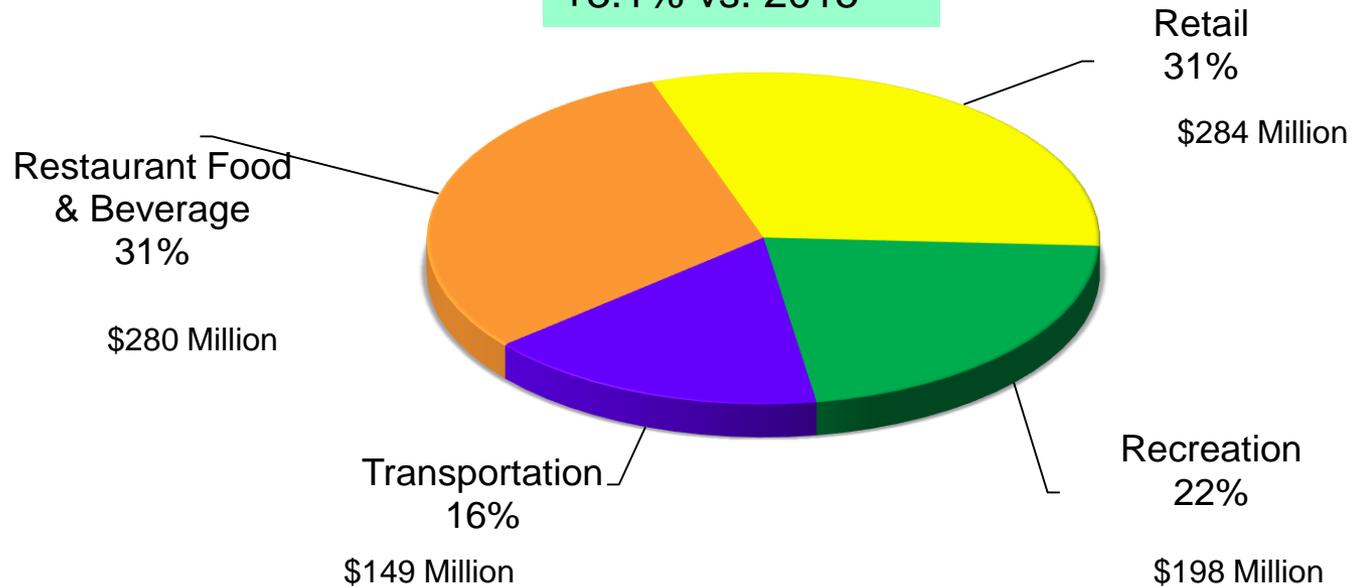
Day Trip Expenditures



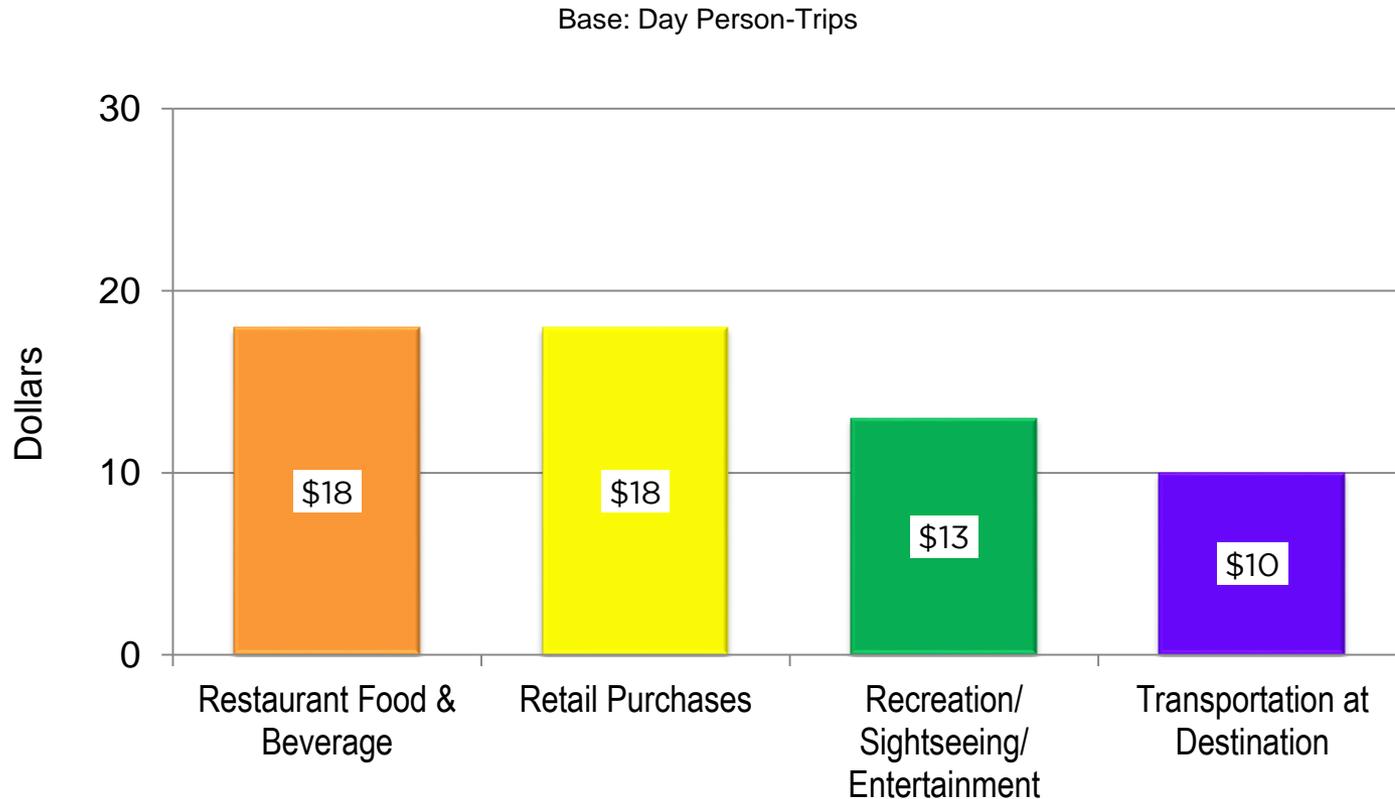
Total Louisville Domestic Day Trip Spending — by Sector

Total Spending = \$911 Million

+3.1% vs. 2015



Average Per Person Expenditures on Day Trips — By Sector

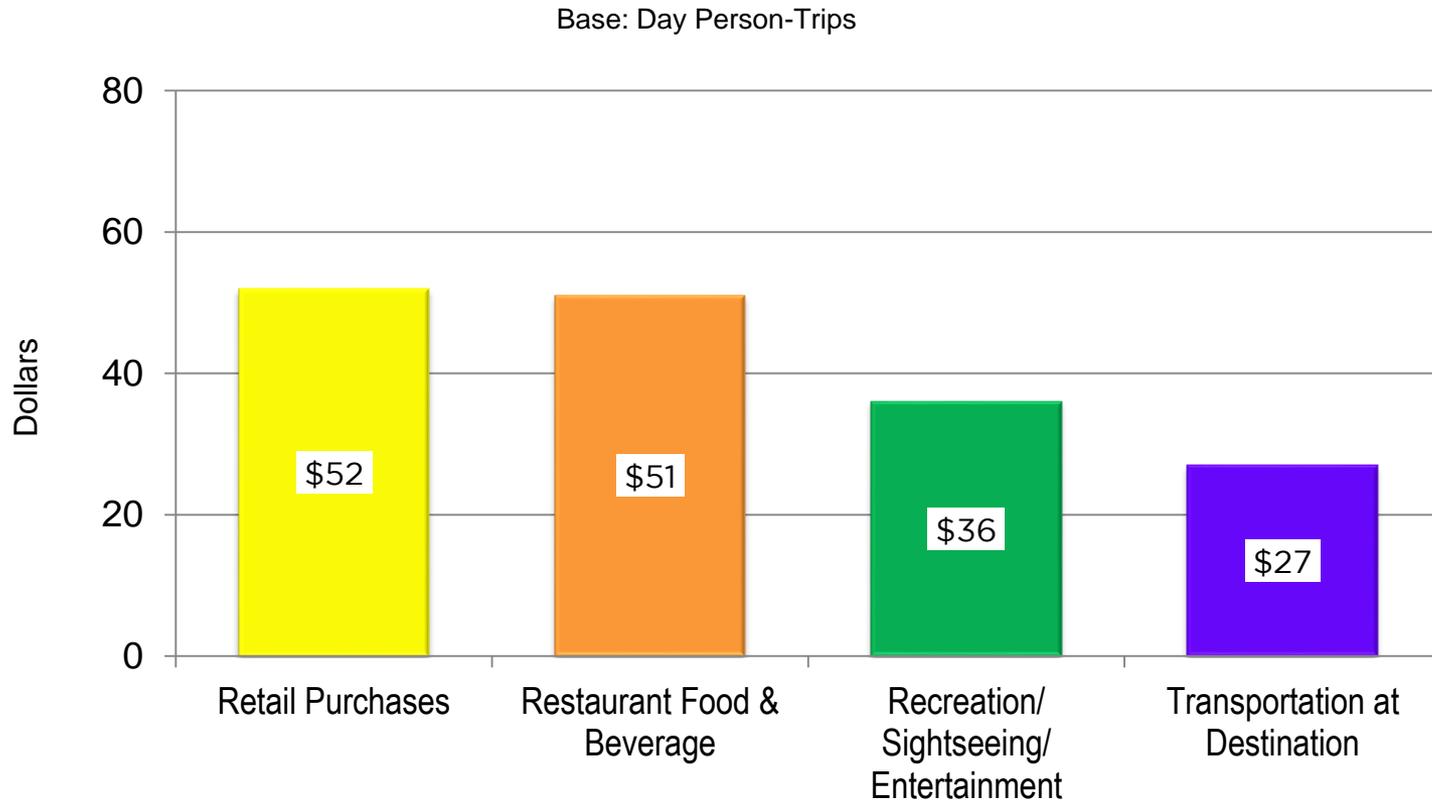


Average Per Person Expenditures on Day Trips — by Trip Purpose



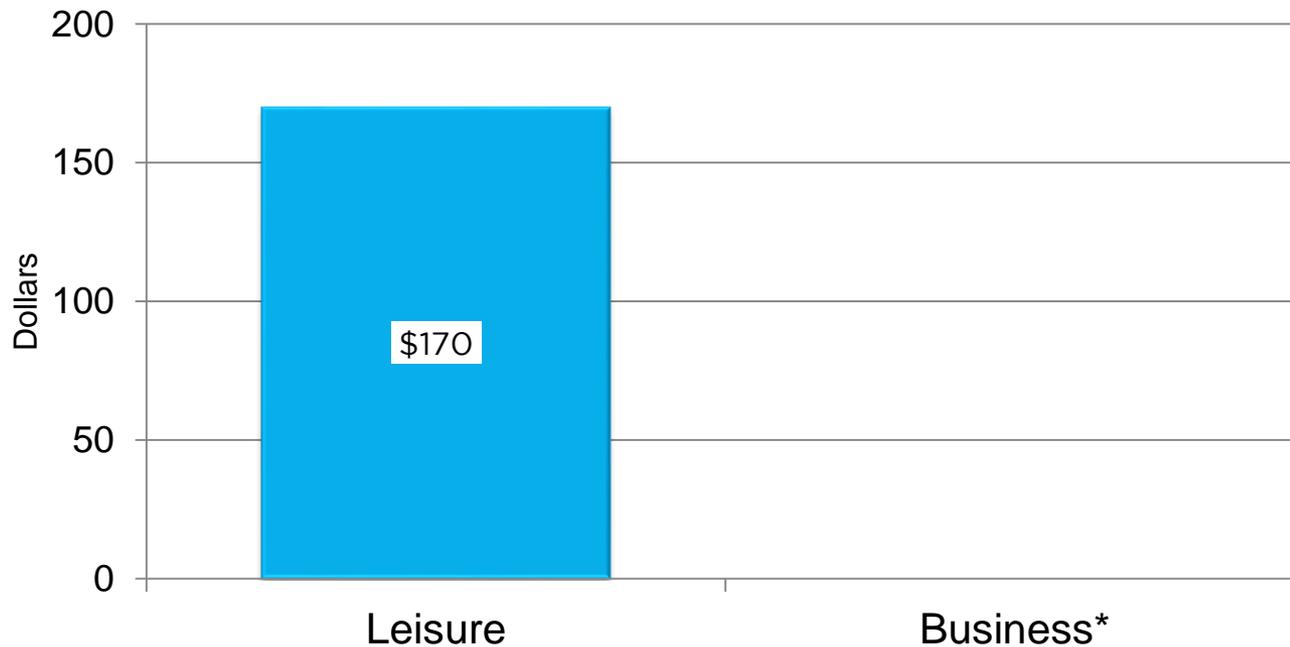
* Low base sizes

Average Per Party Expenditures on Day Trips — By Sector



Average Per Party Expenditures on Day Trip — by Trip Purpose

Base: Day Person-Trips



* Low base sizes

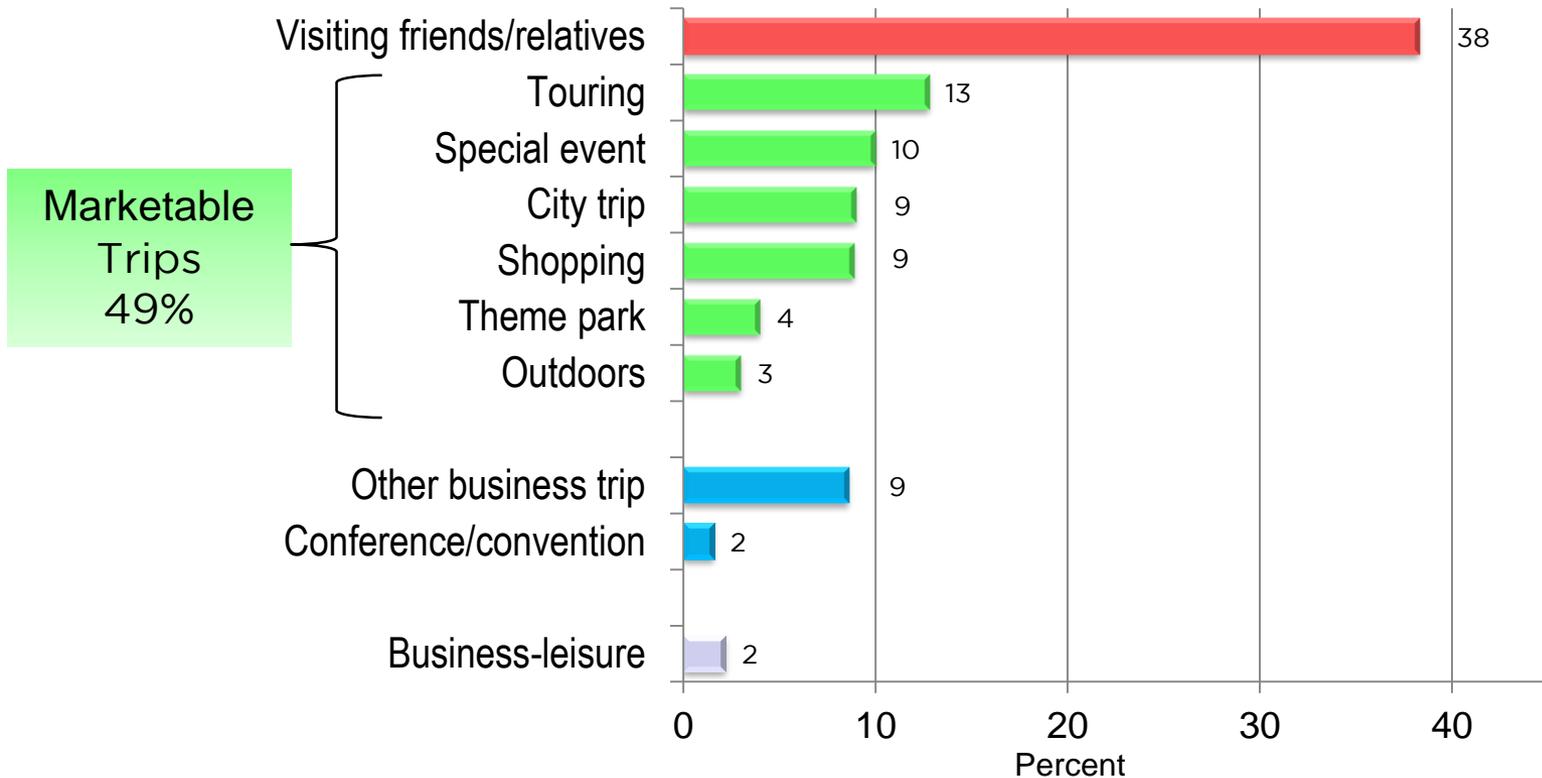


Day Trip Characteristics

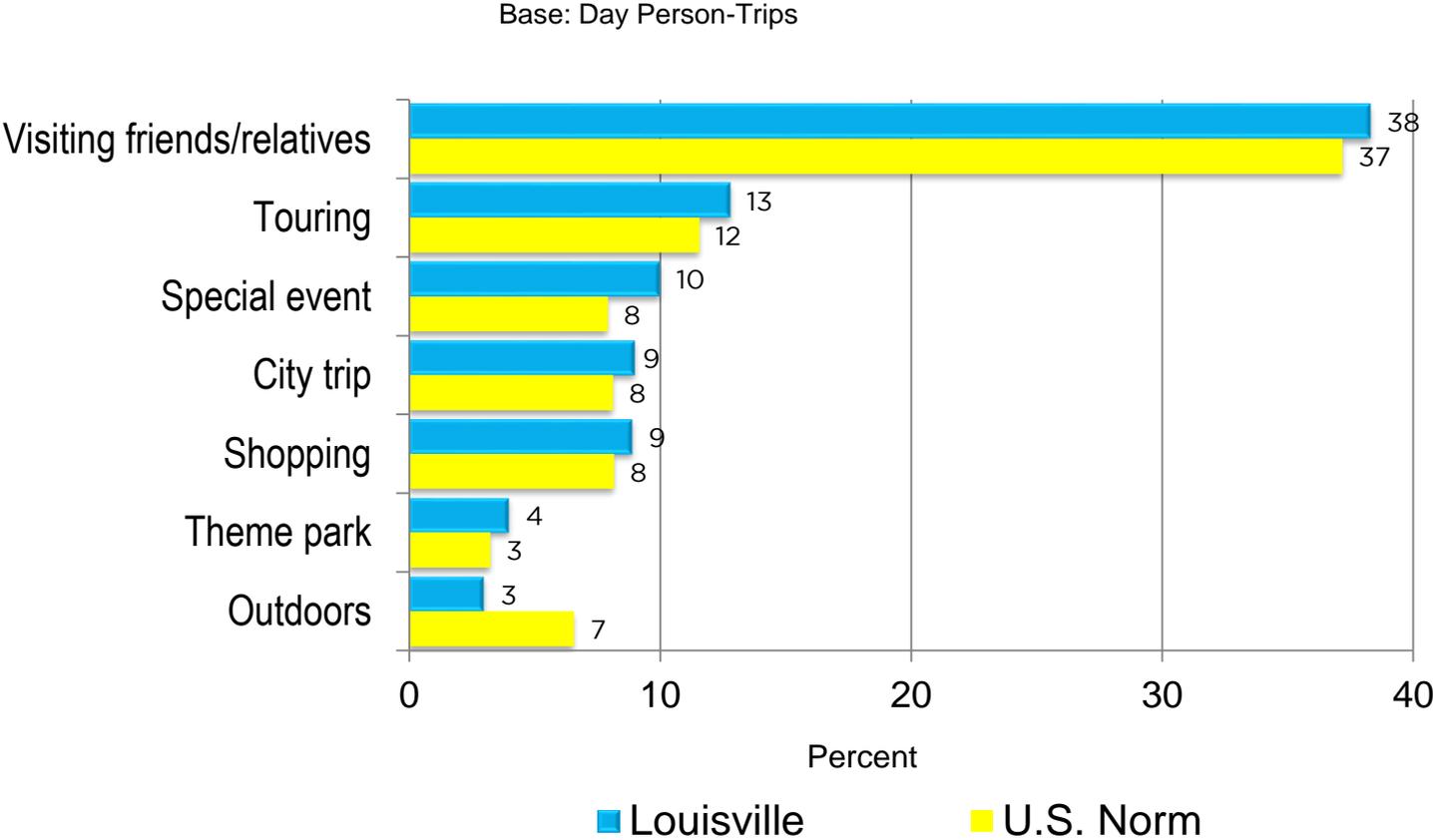


Main Purpose of Trip

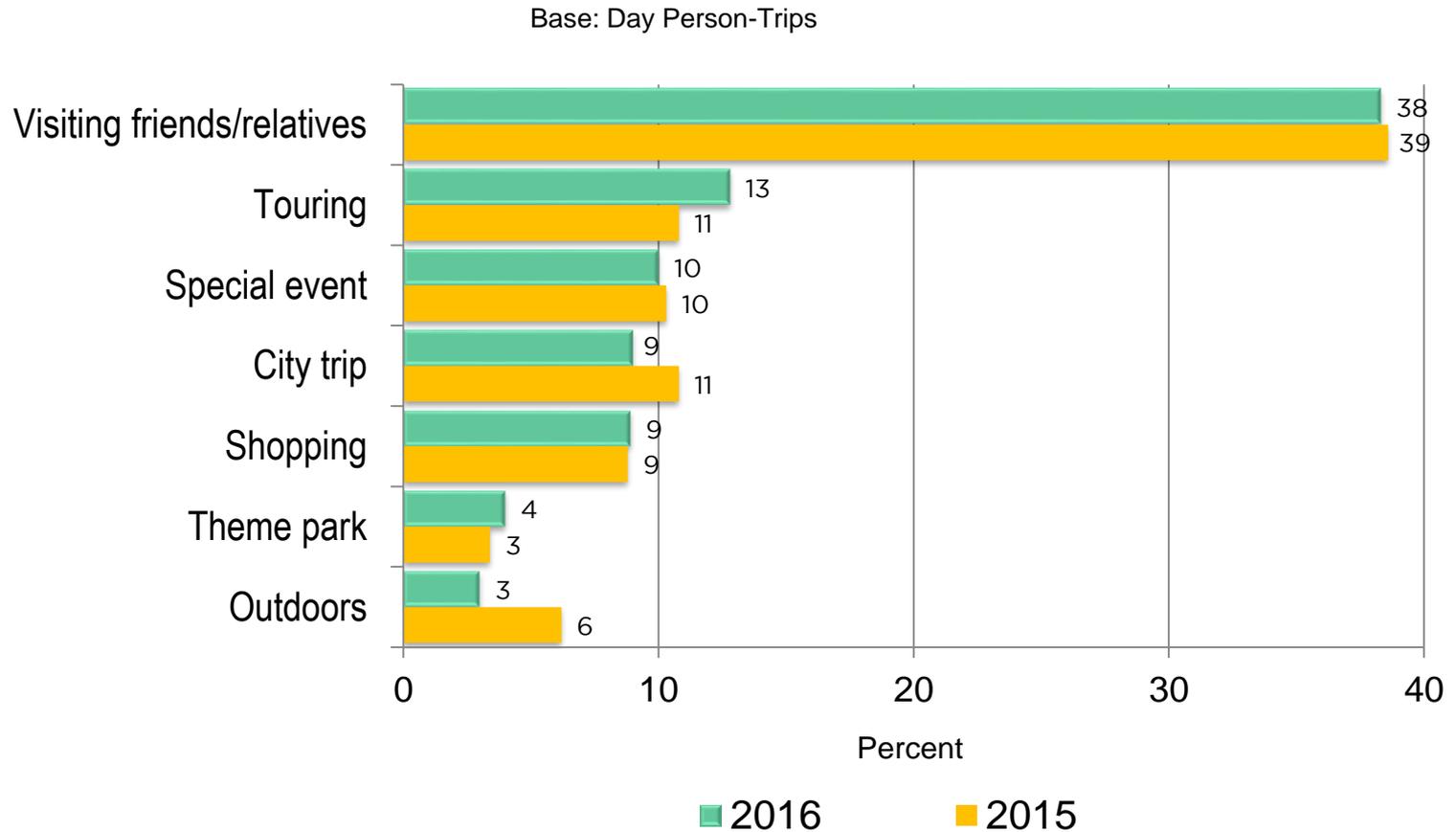
Base: Day Person-Trips



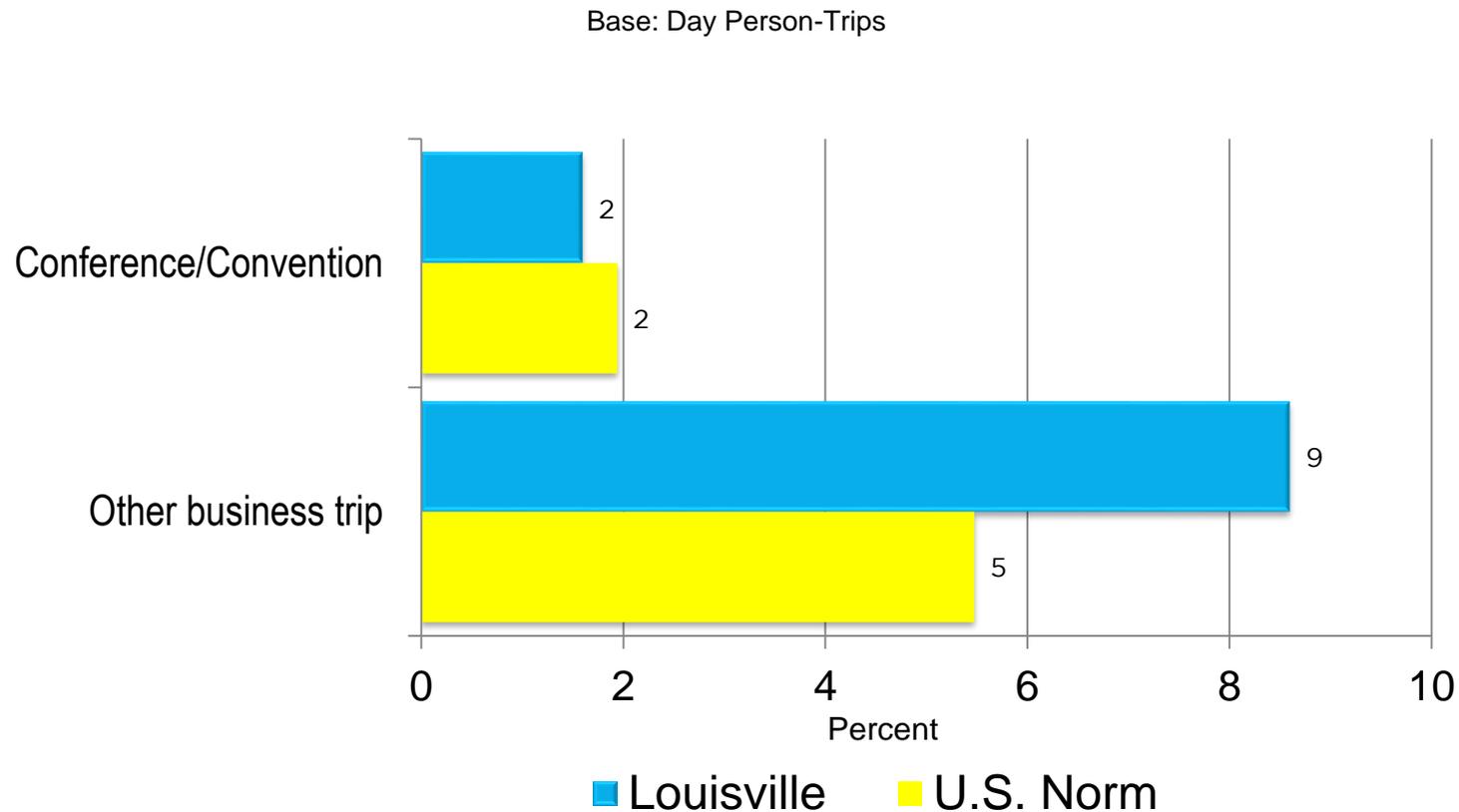
Main Purpose of Leisure Trip — Louisville vs. National Norm



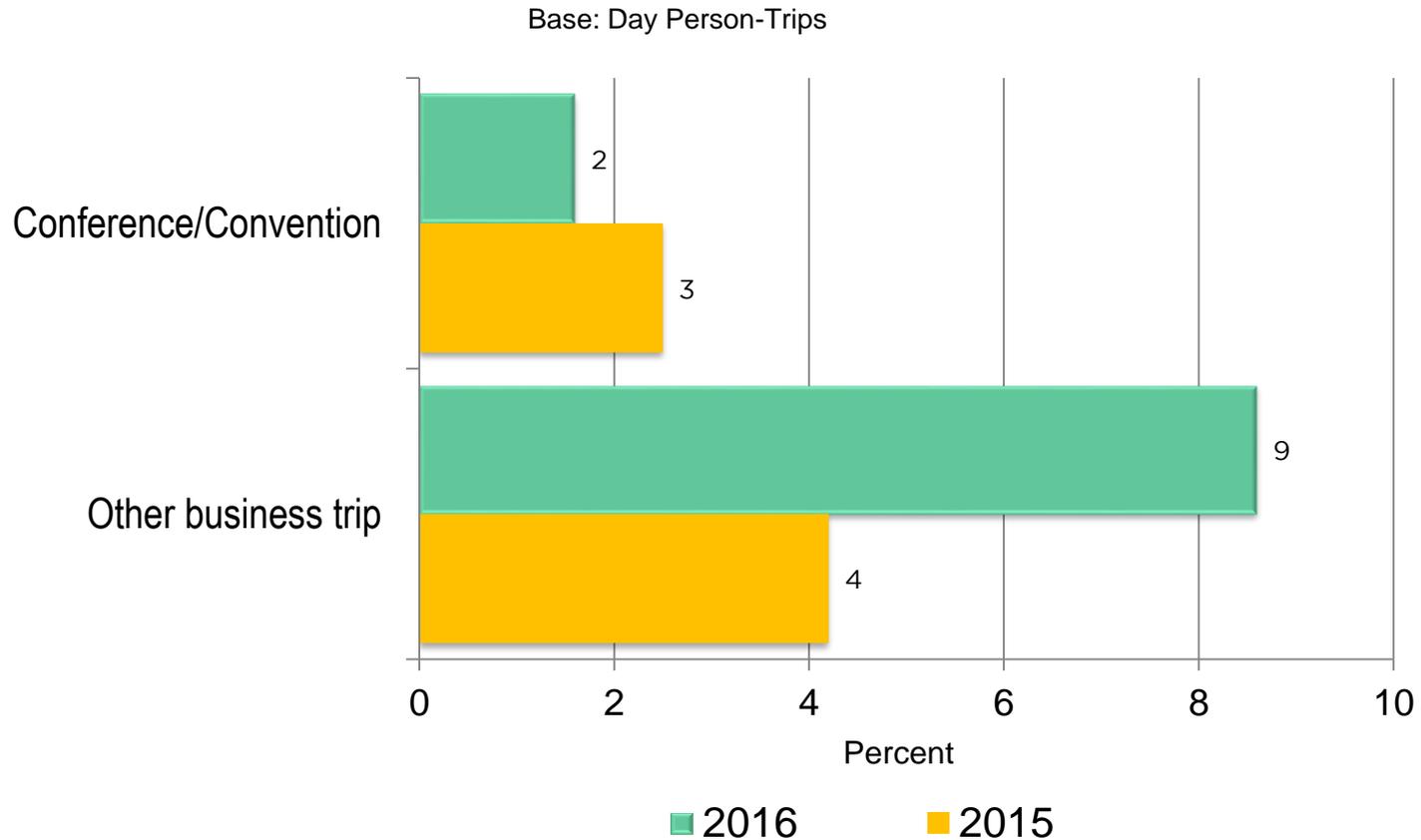
Main Purpose of Day Leisure Trip — 2016 vs. 2015



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

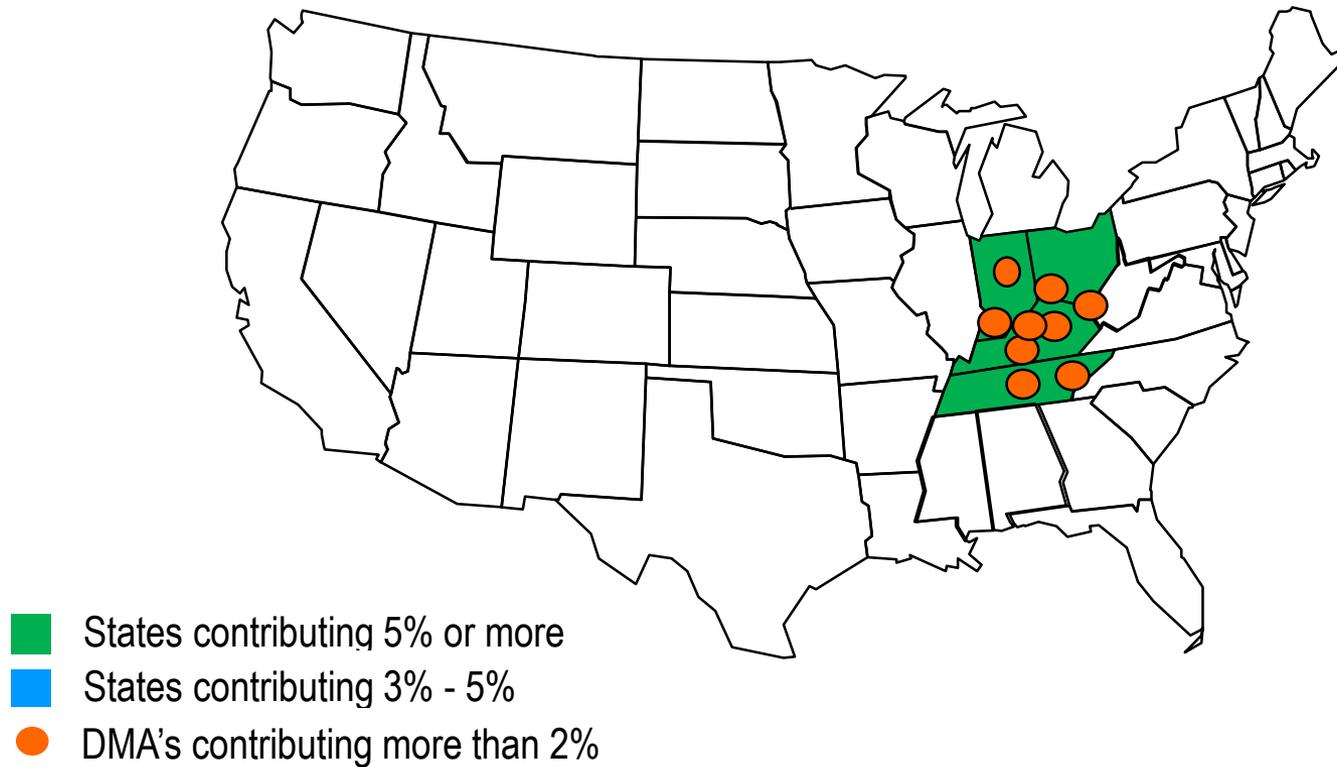


Main Purpose of Day Business Trip — 2016 vs. 2015

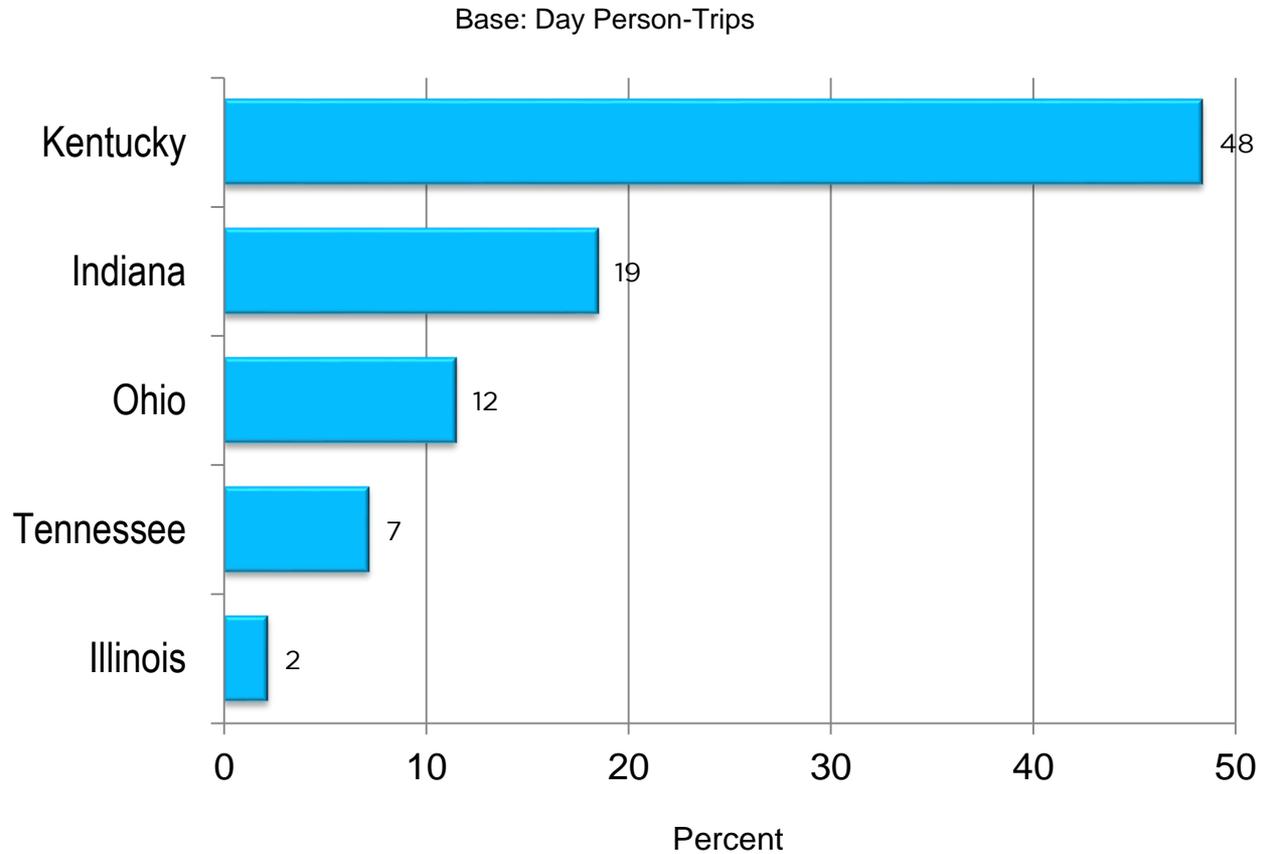


Sources of Business

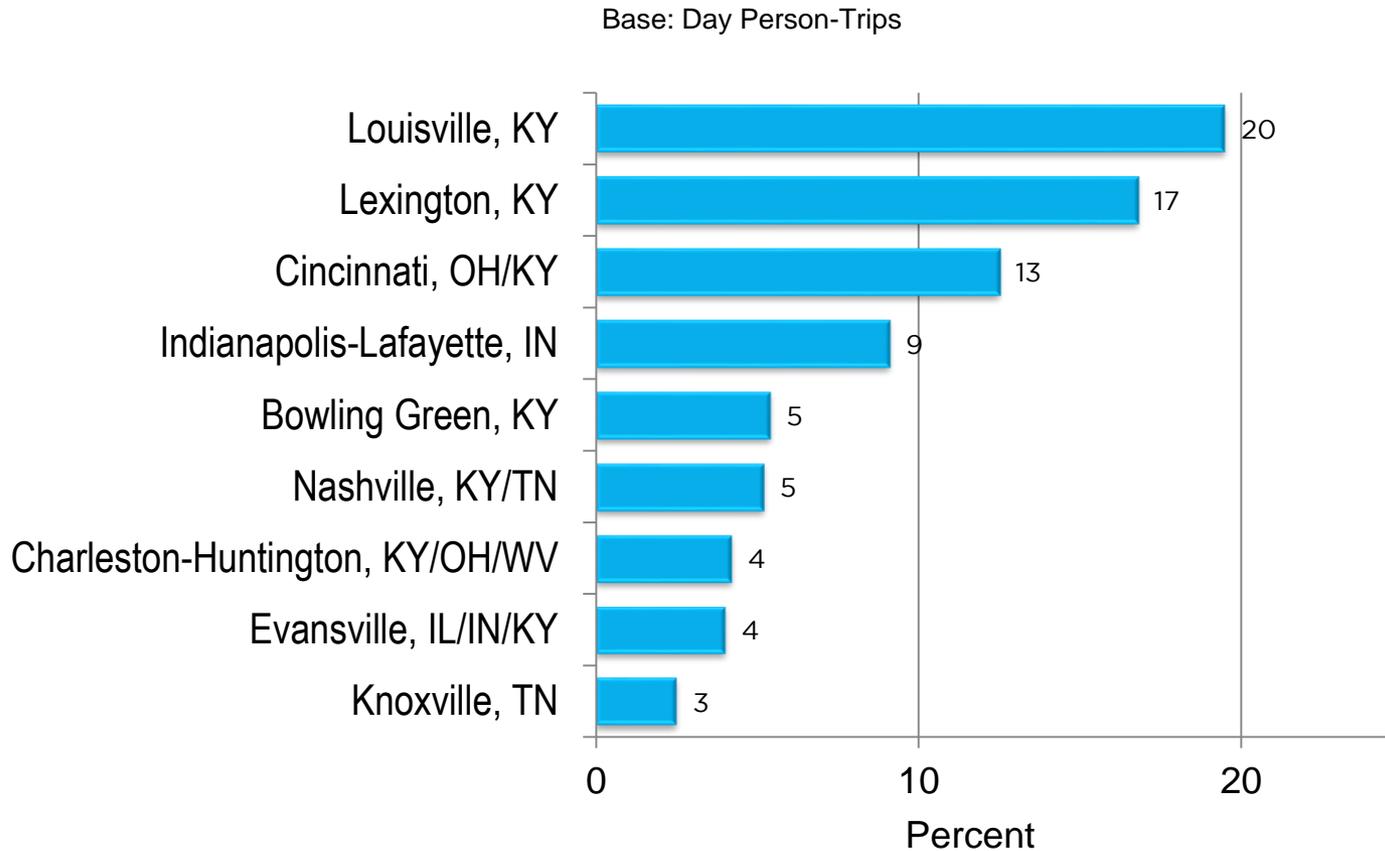
Base: Day Person-Trips



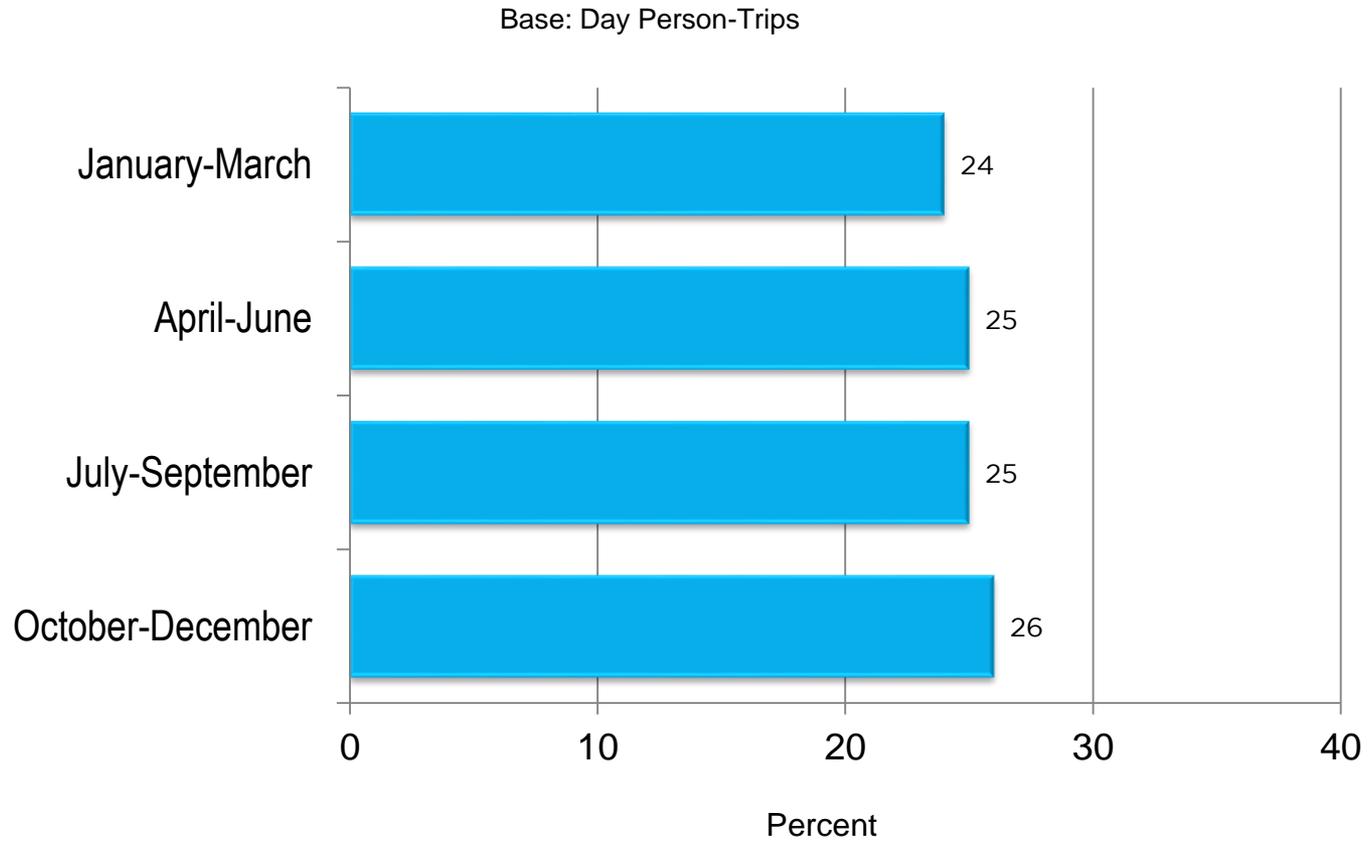
State Origin Of Trip



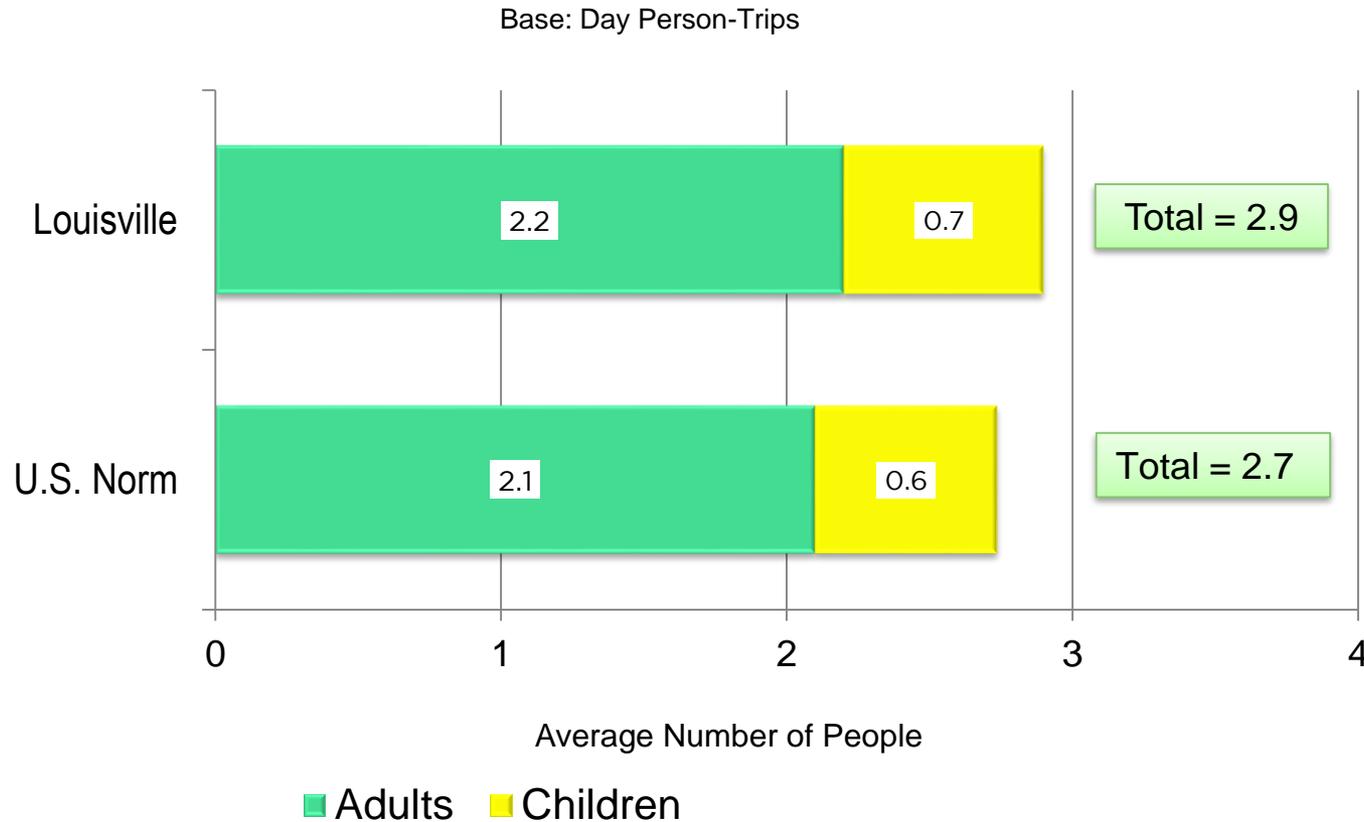
DMA Origin Of Trip



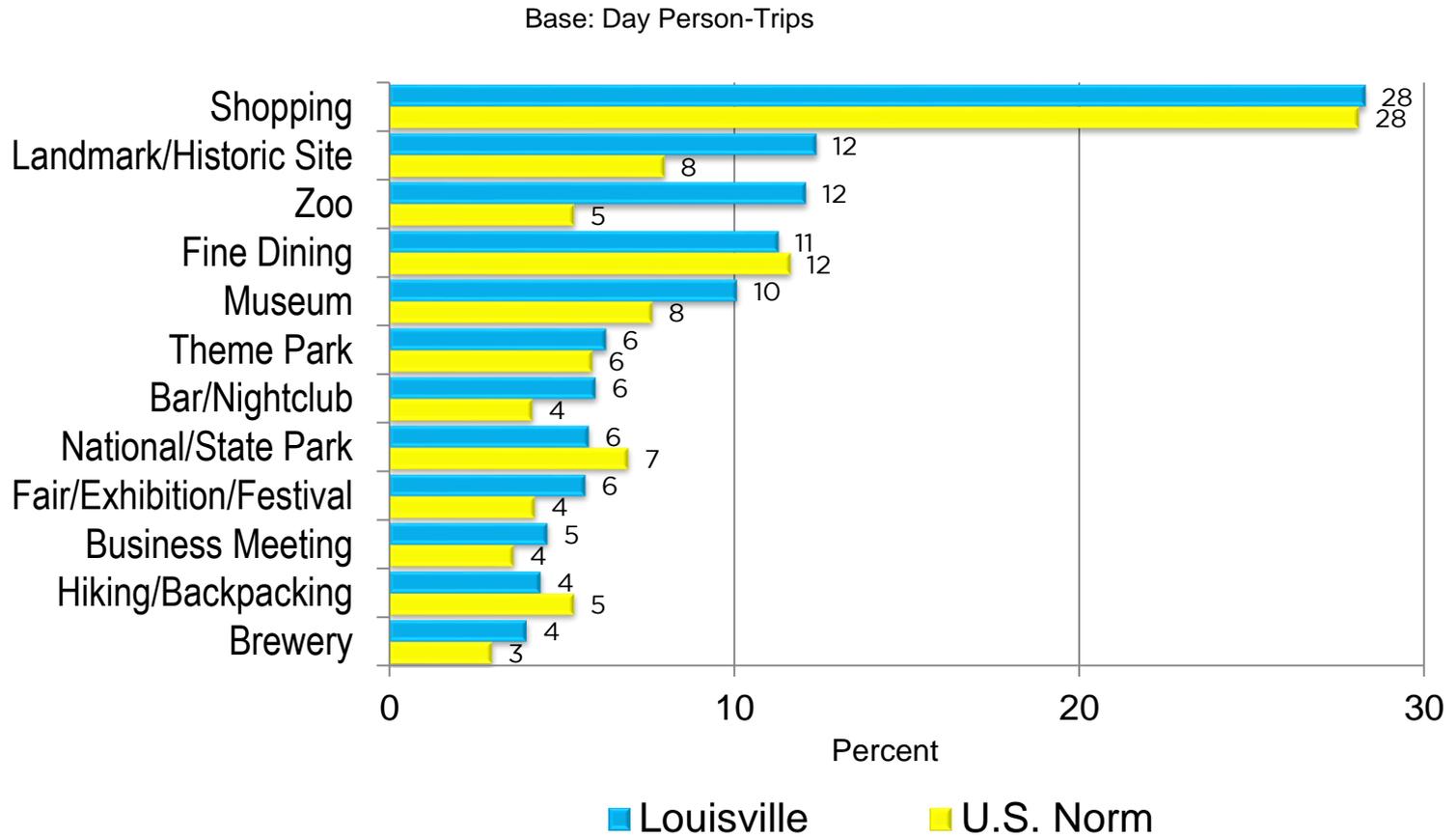
Season of Trip



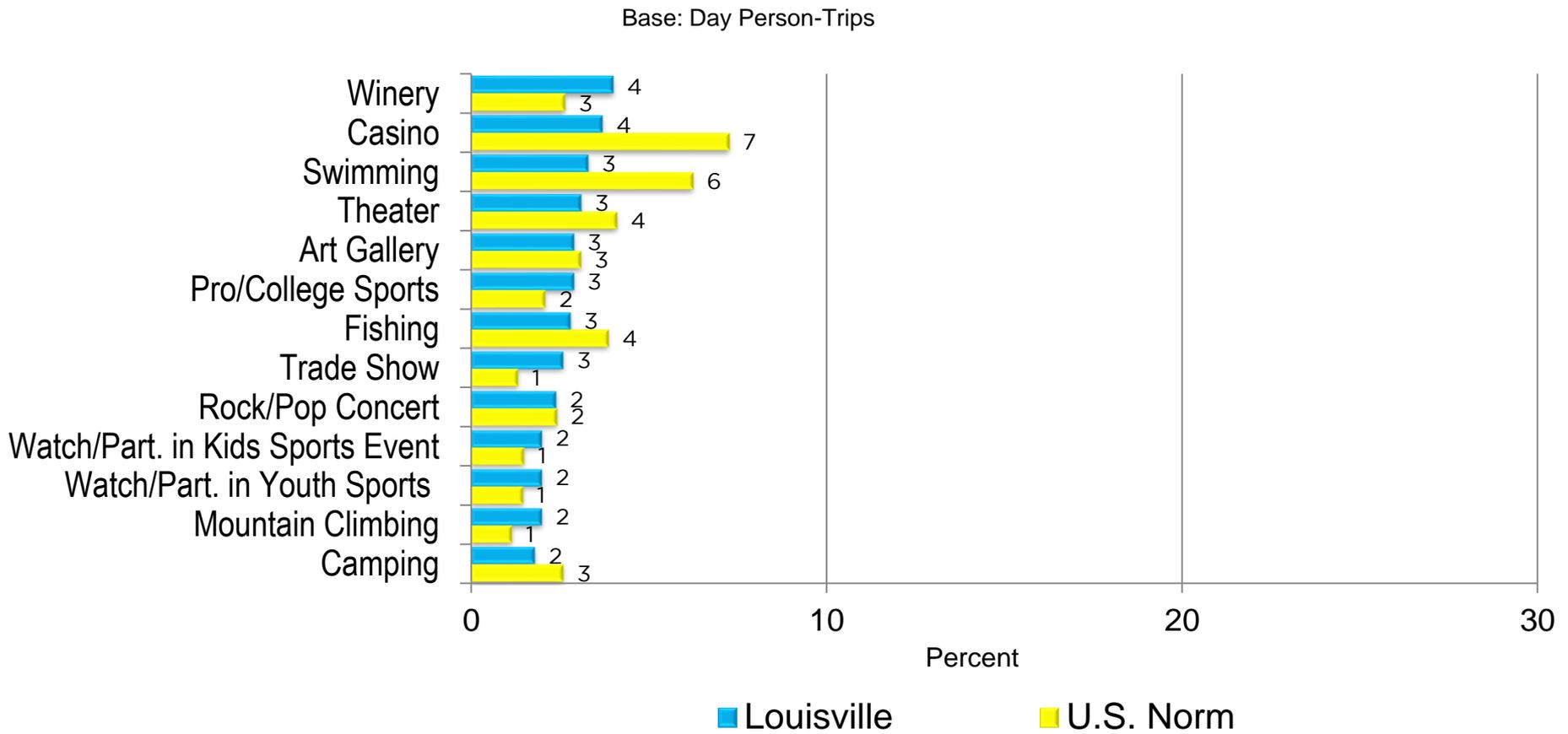
Size of Travel Party



Activities and Experiences

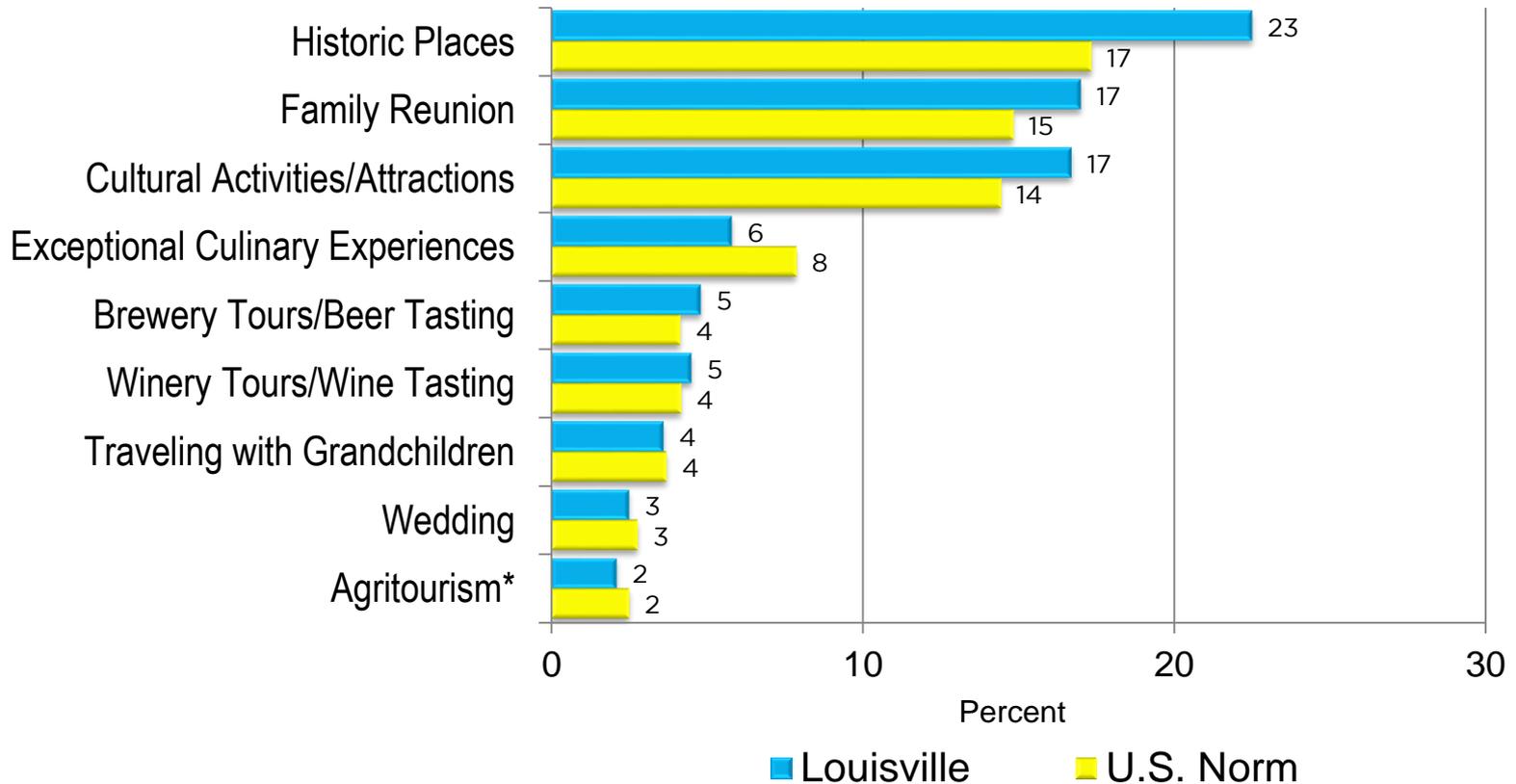


Activities and Experiences (Cont'd)



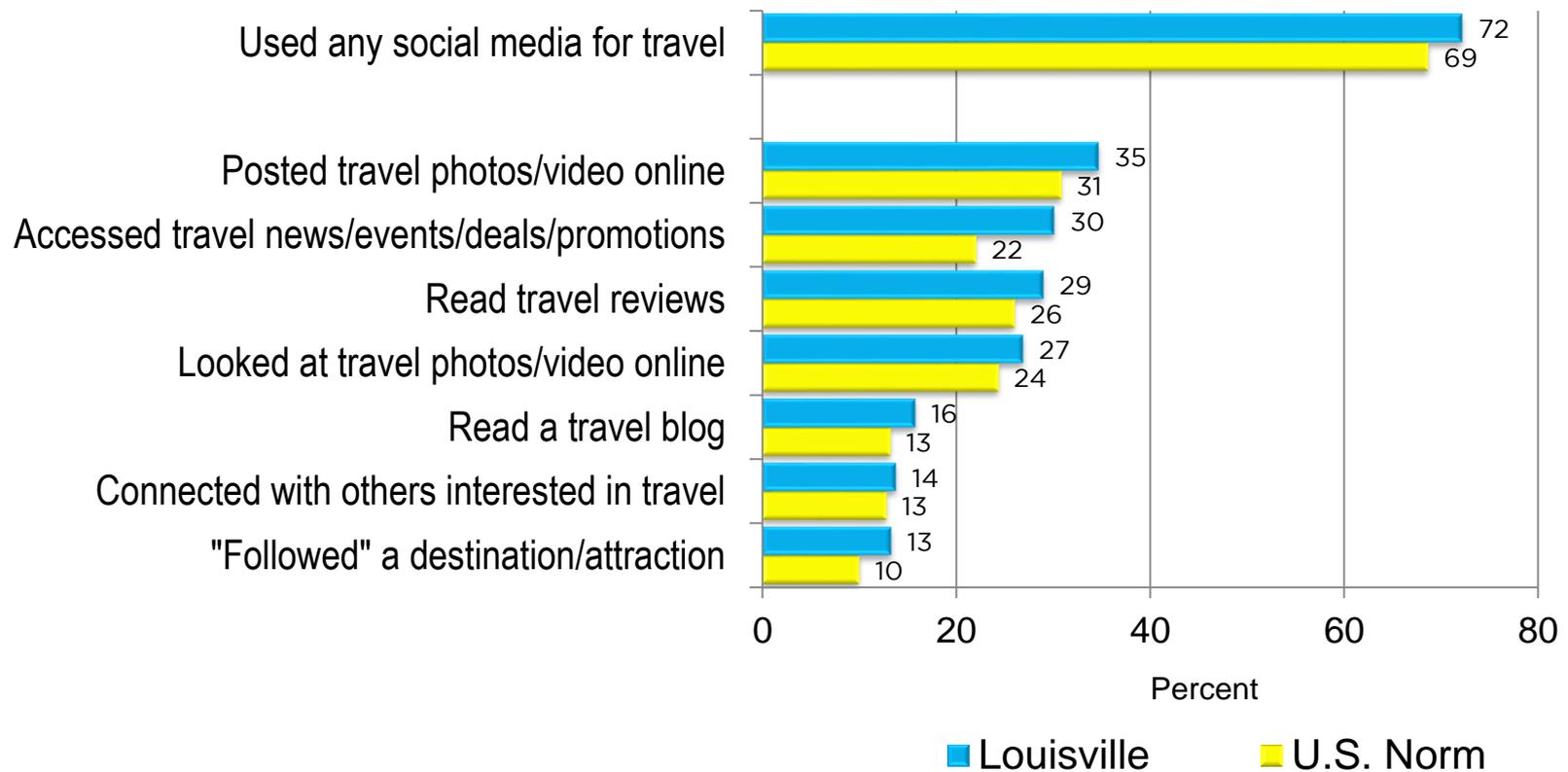
Activities of Special Interest

Base: Day Person-Trips

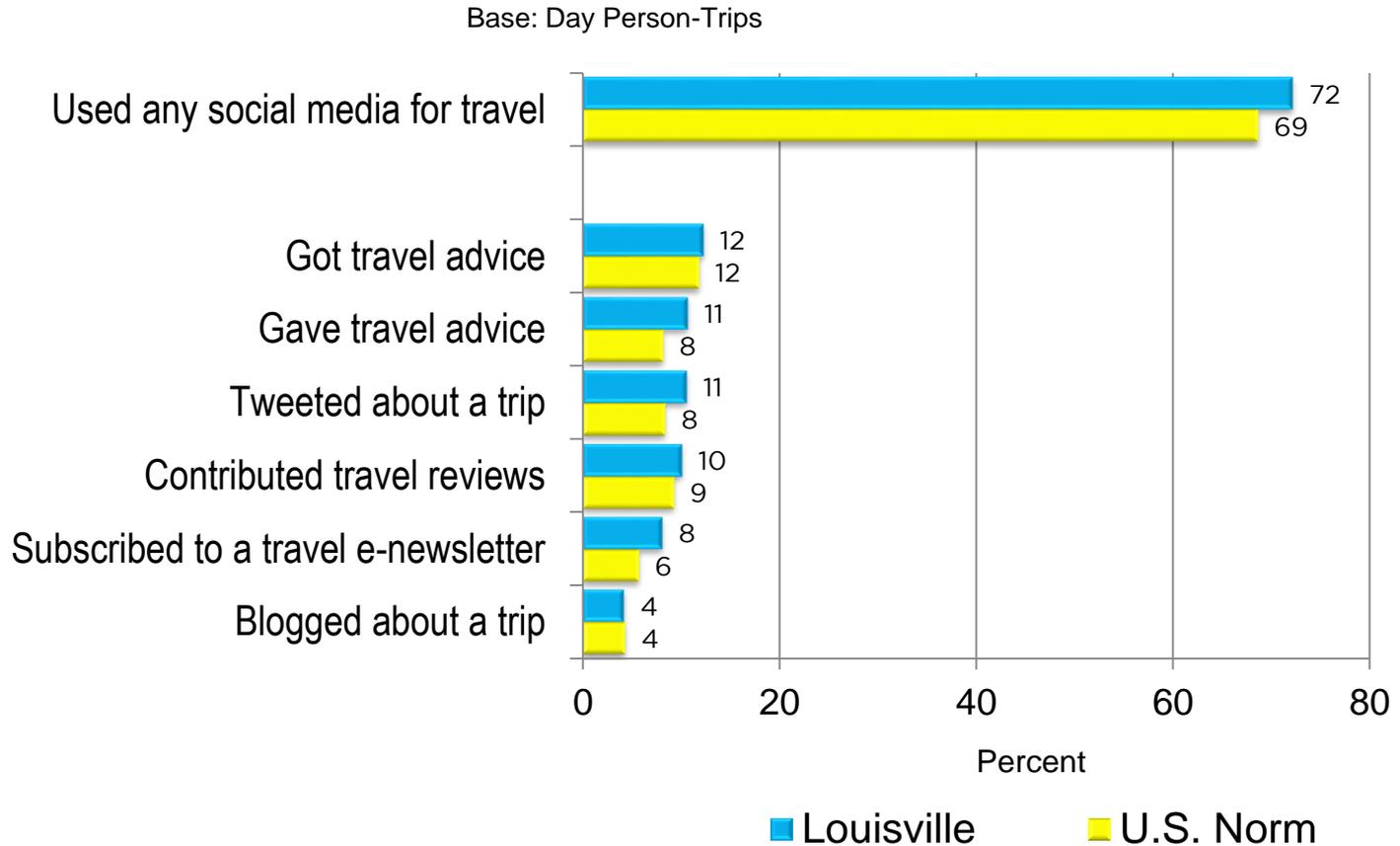


Online Social Media Use by Travelers

Base: Day Person-Trips

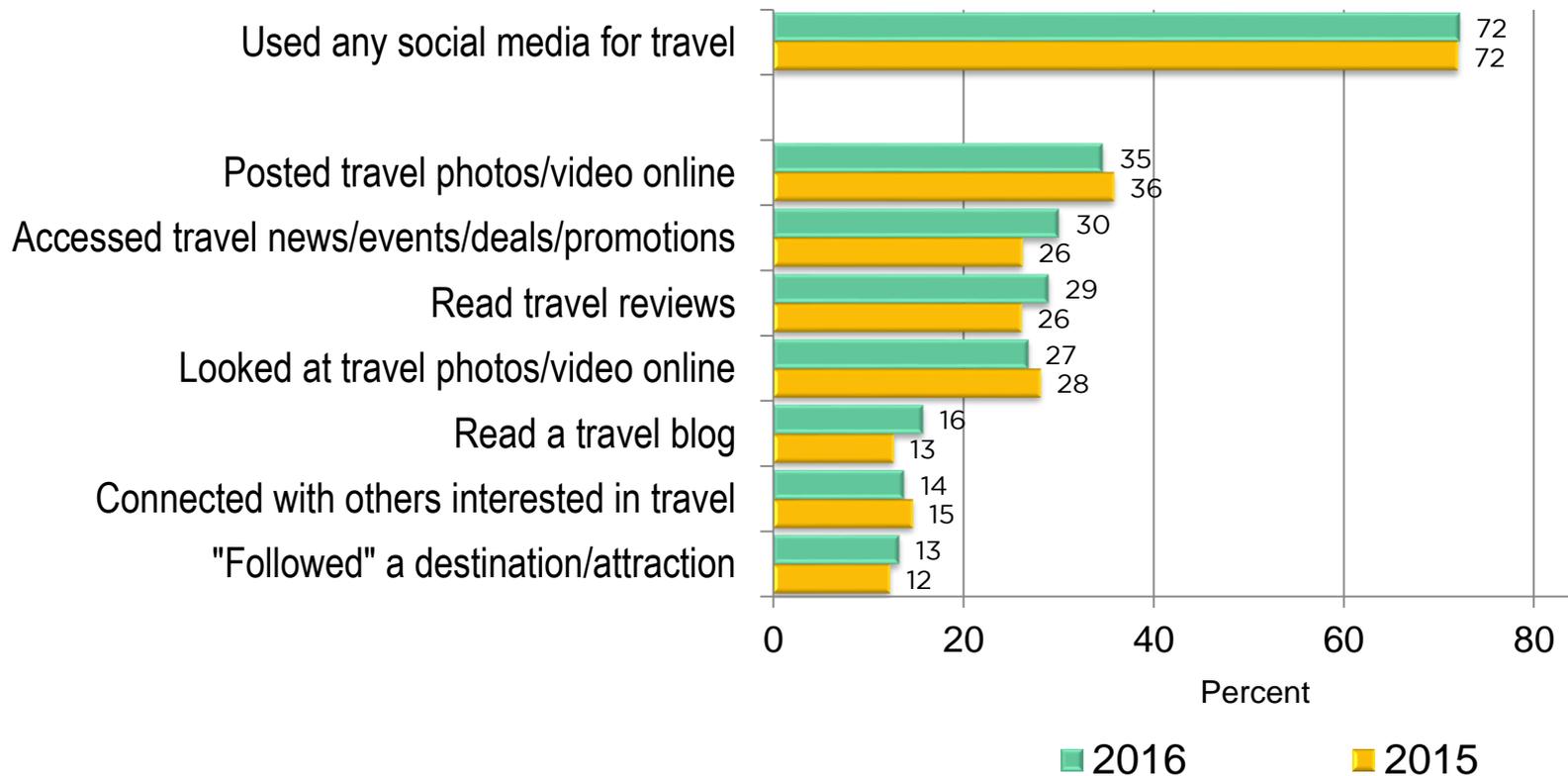


Online Social Media Use by Travelers (Cont'd)

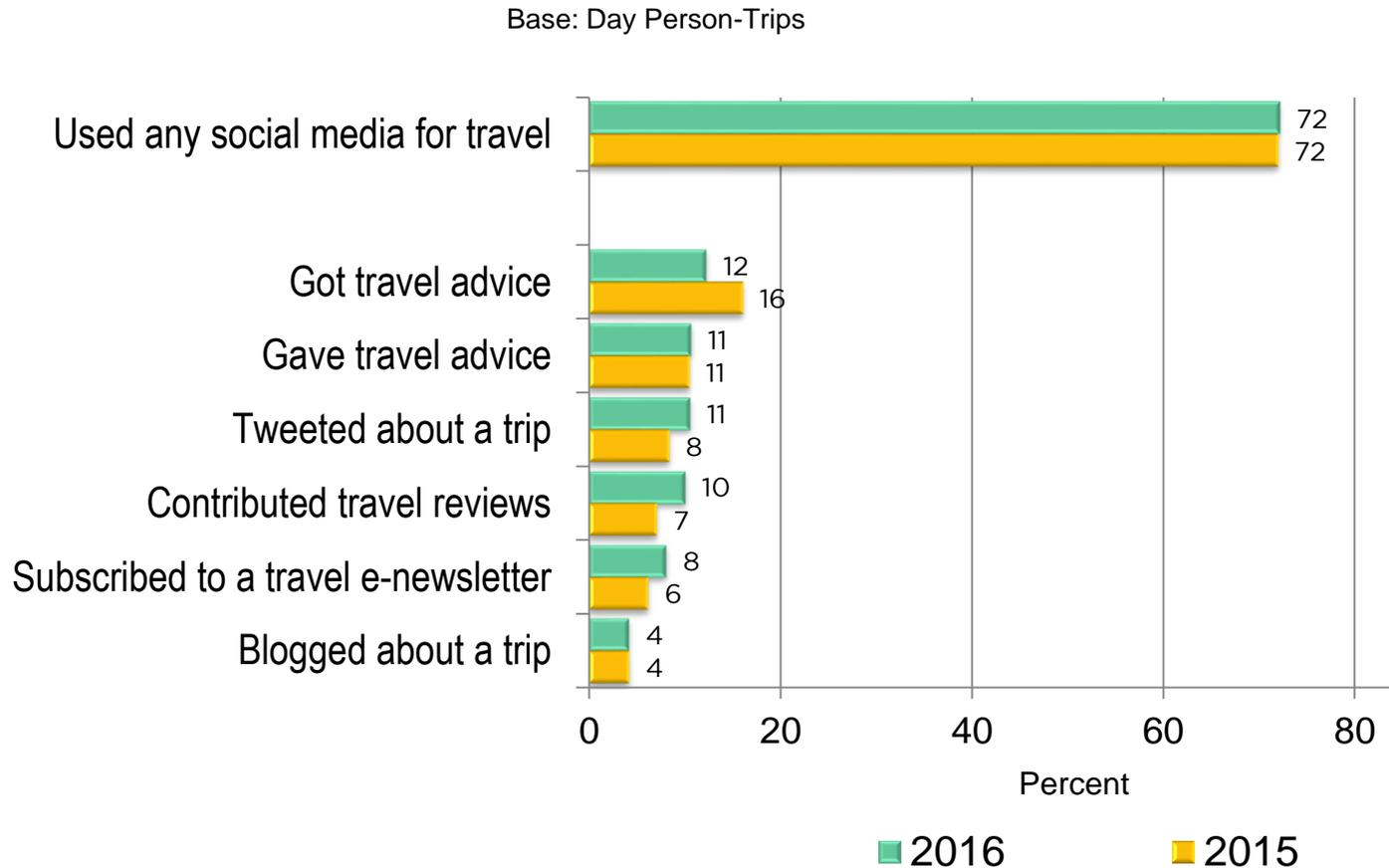


Online Social Media Use by Travelers – 2016 vs. 2015

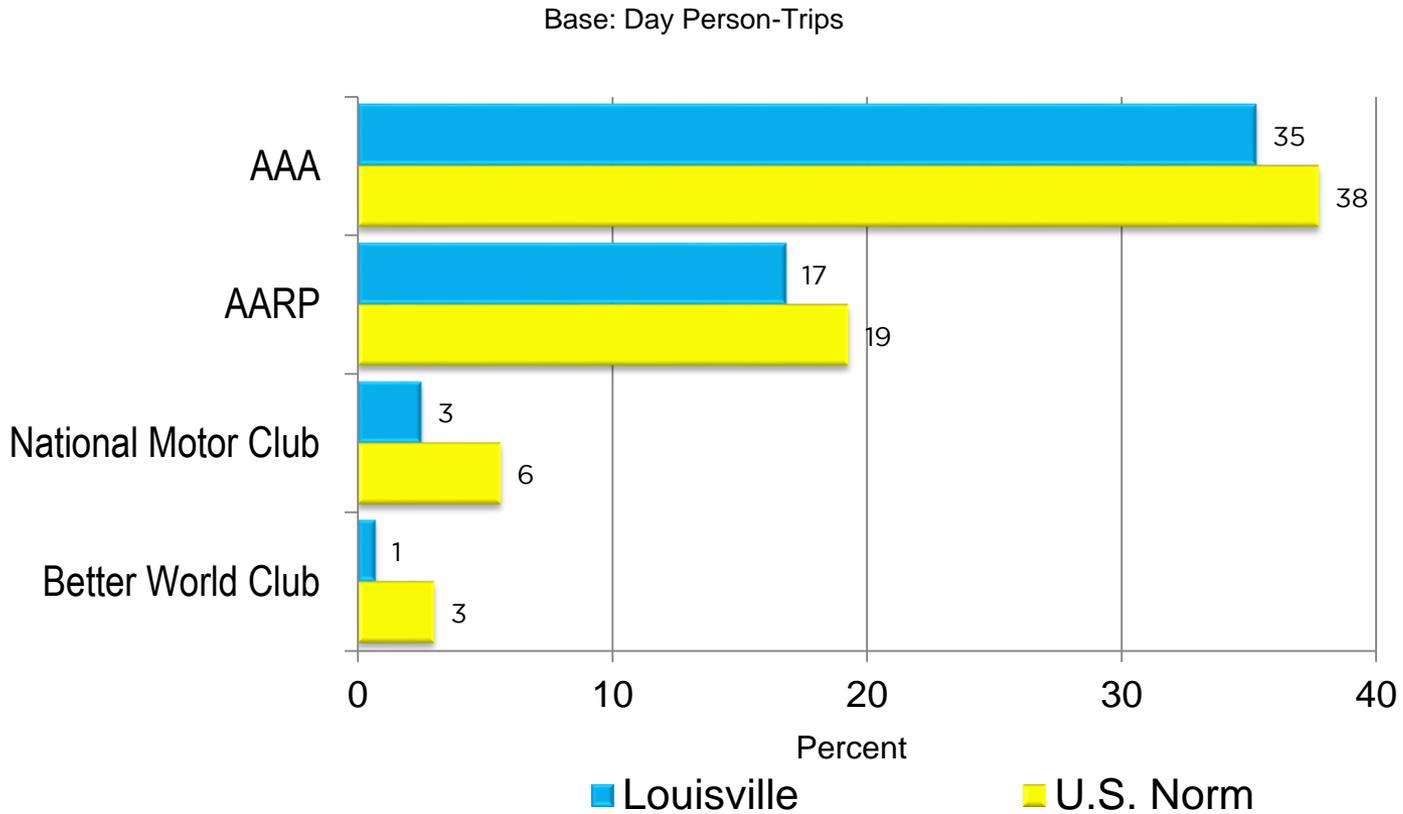
Base: Day Person-Trips



Online Social Media Use by Travelers – 2016 vs. 2015 (Cont'd)



Organization Membership

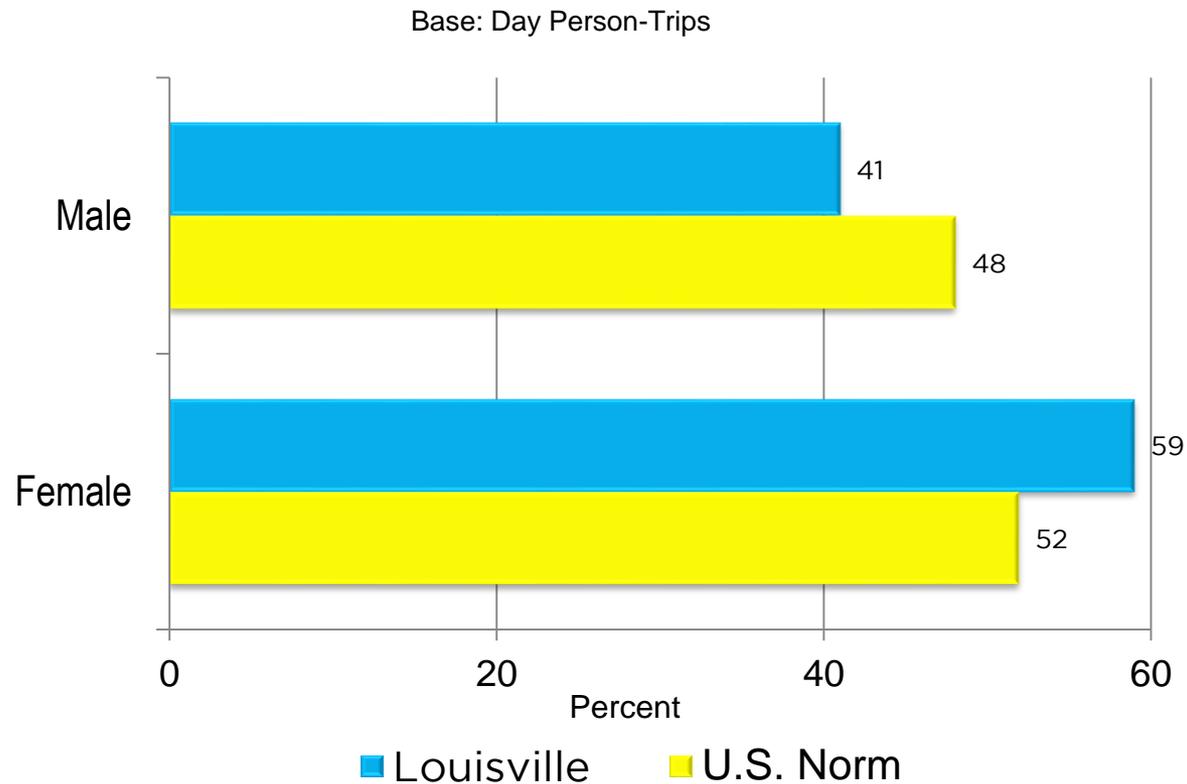




Demographic Profile of Day Visitors



Gender

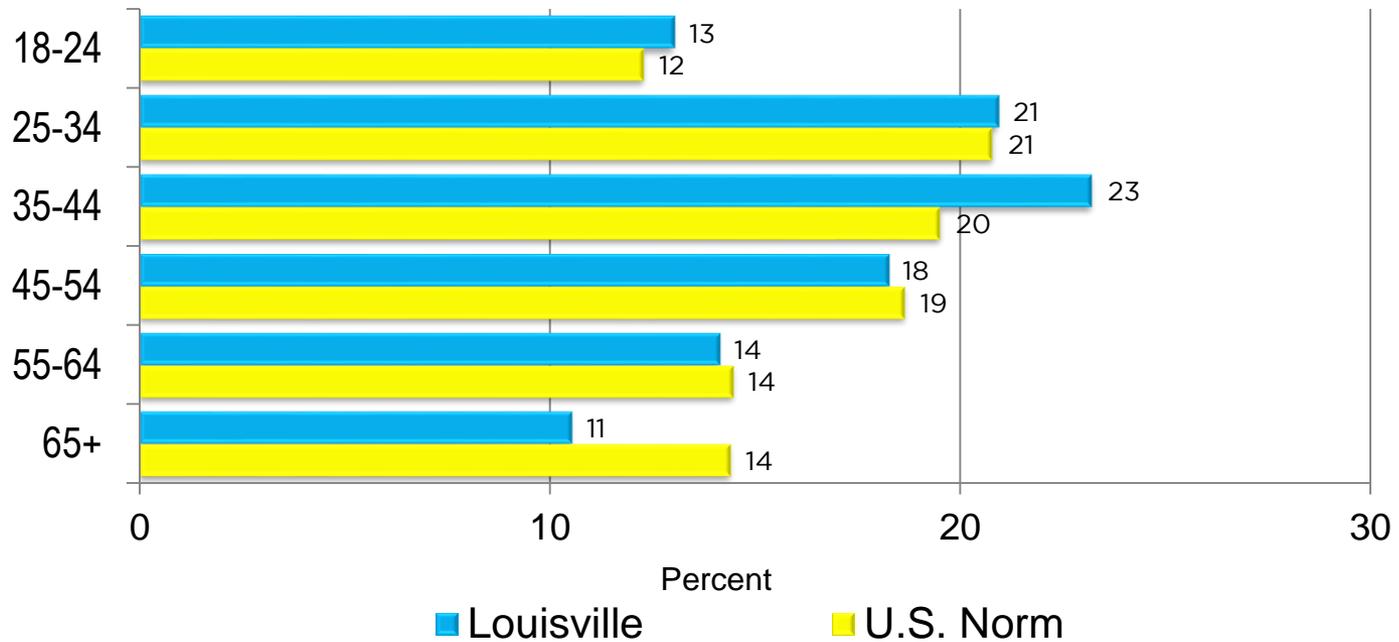


Age

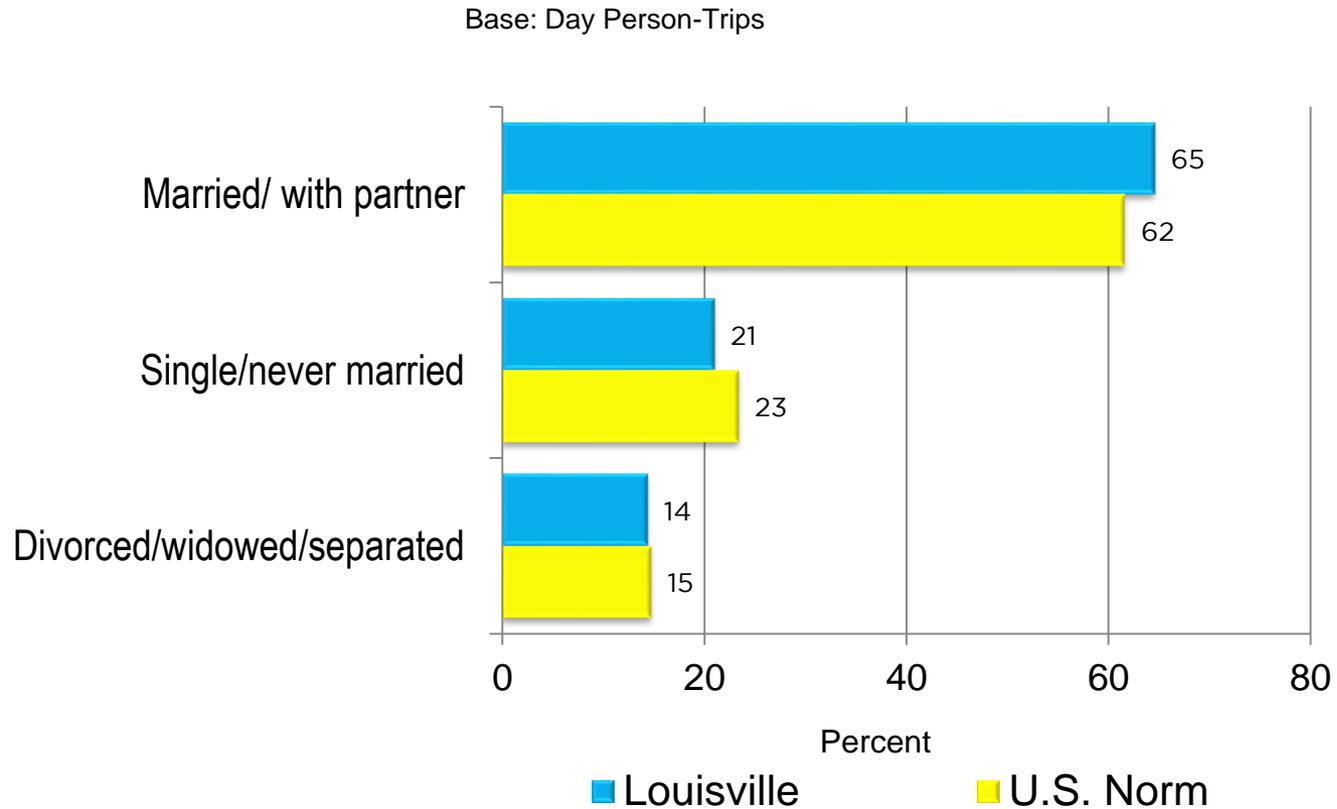
Base: Day Person-Trips

Average Louisville = 43.2

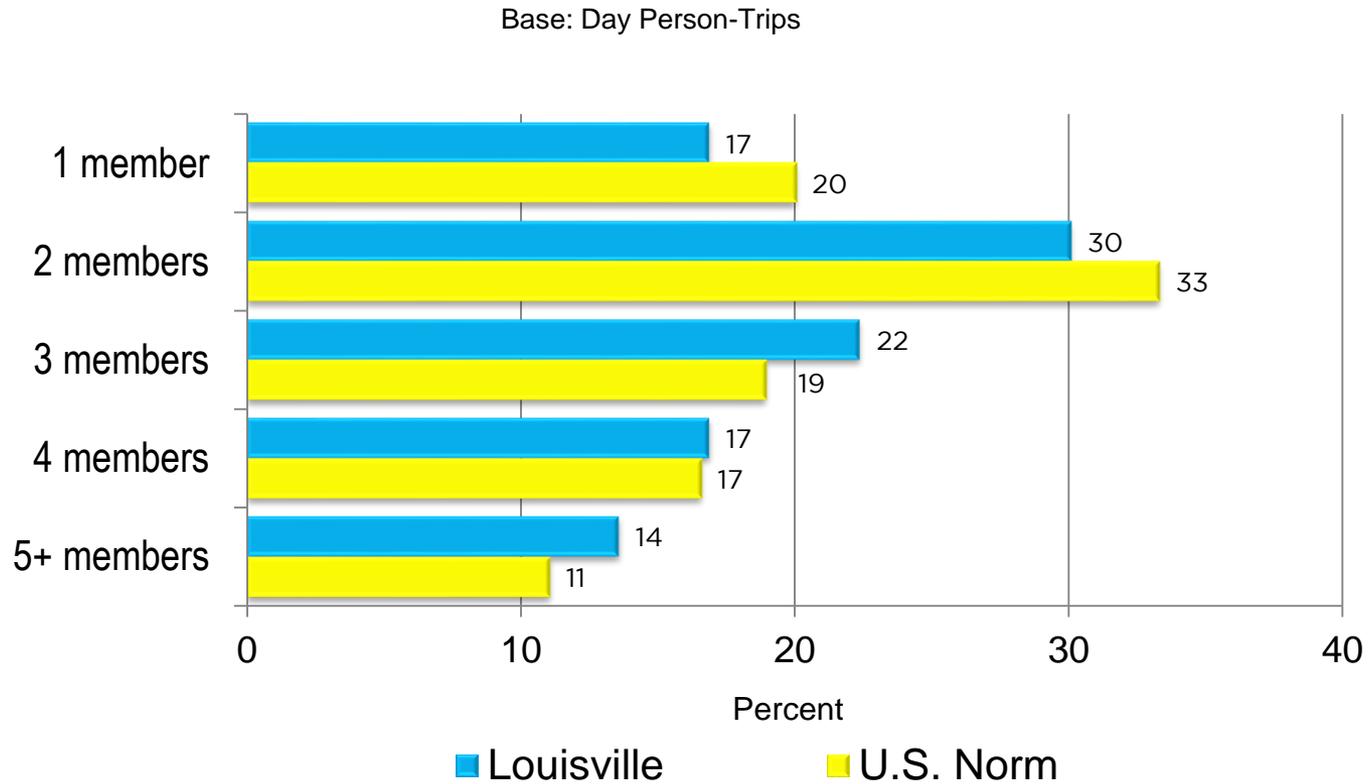
Average U.S. Norm = 44.7



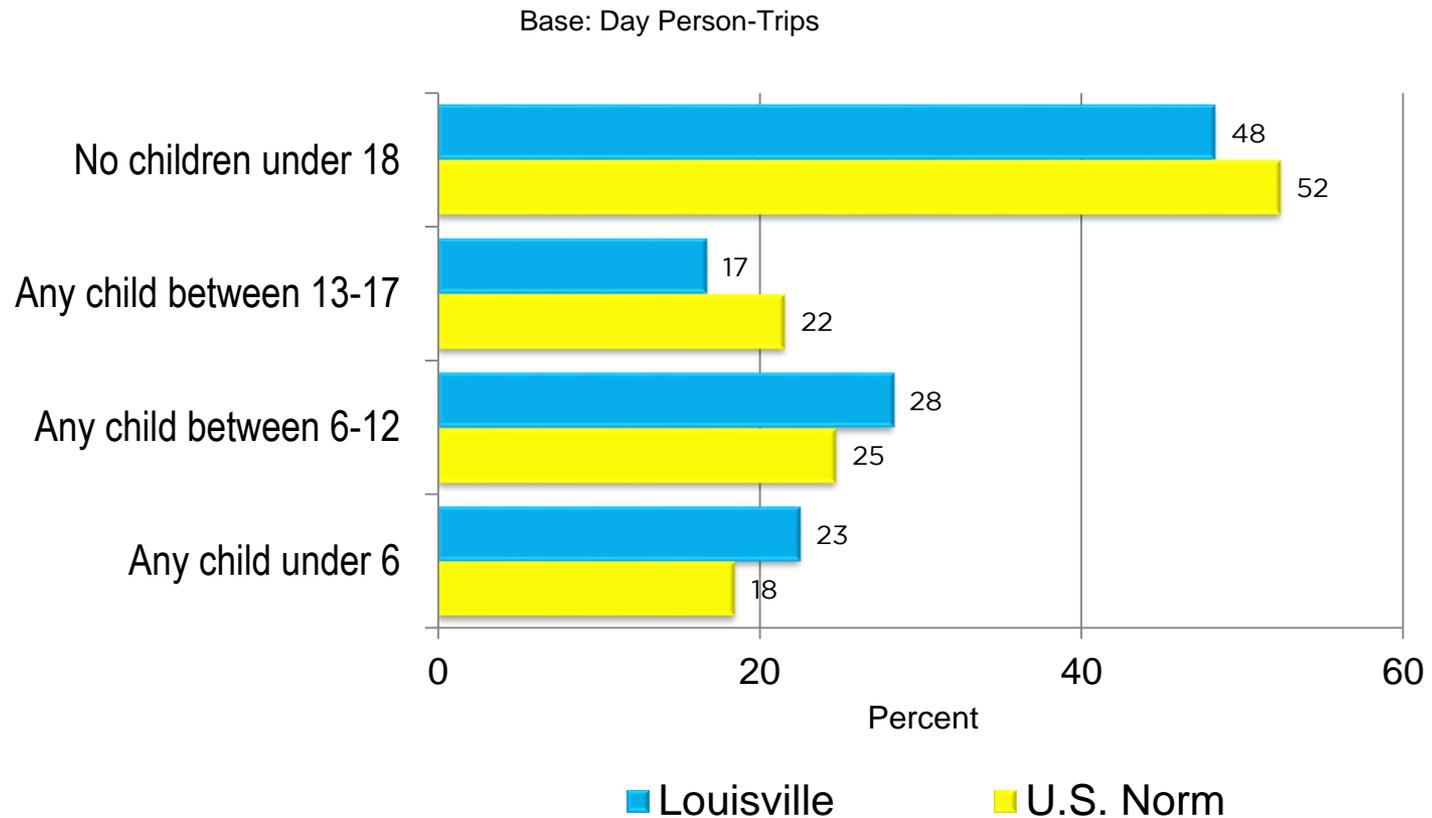
Marital Status



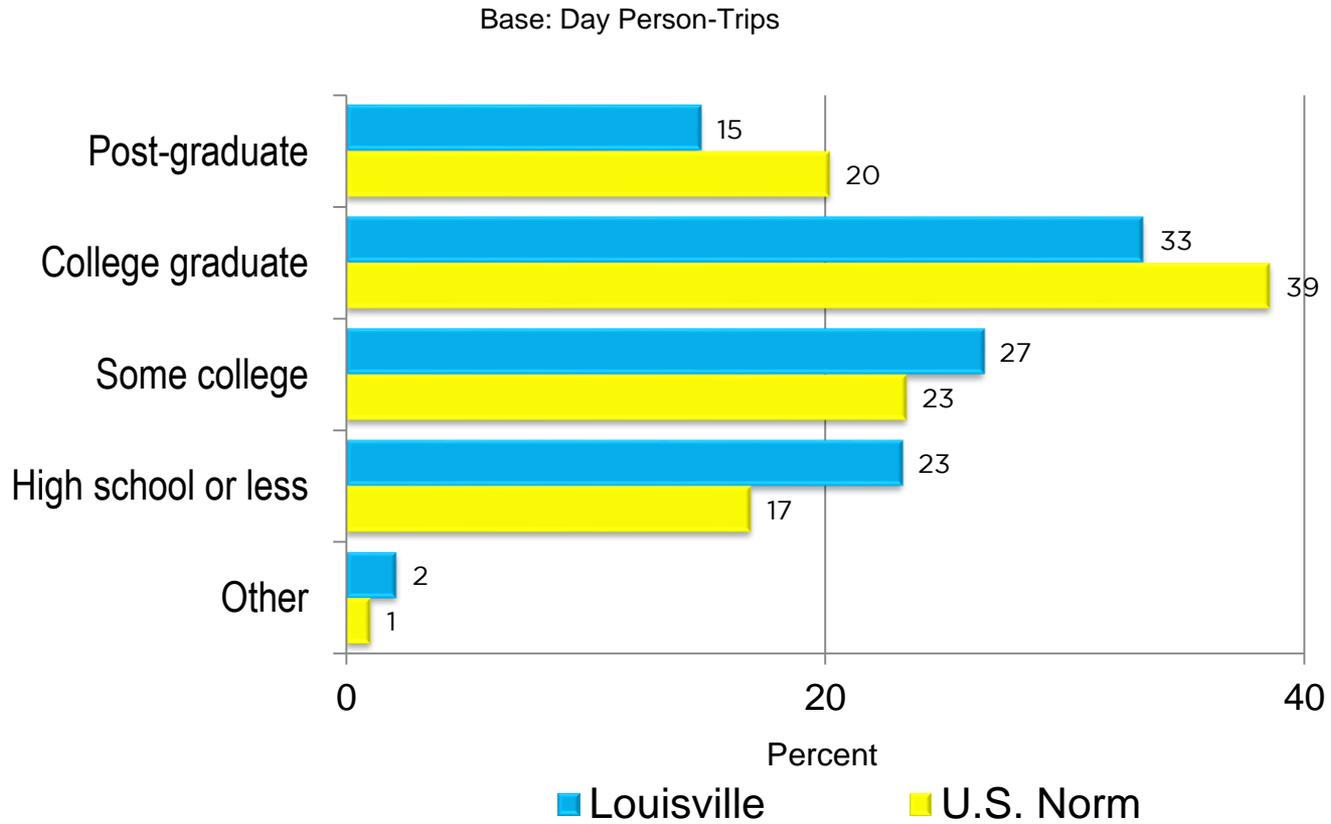
Household Size



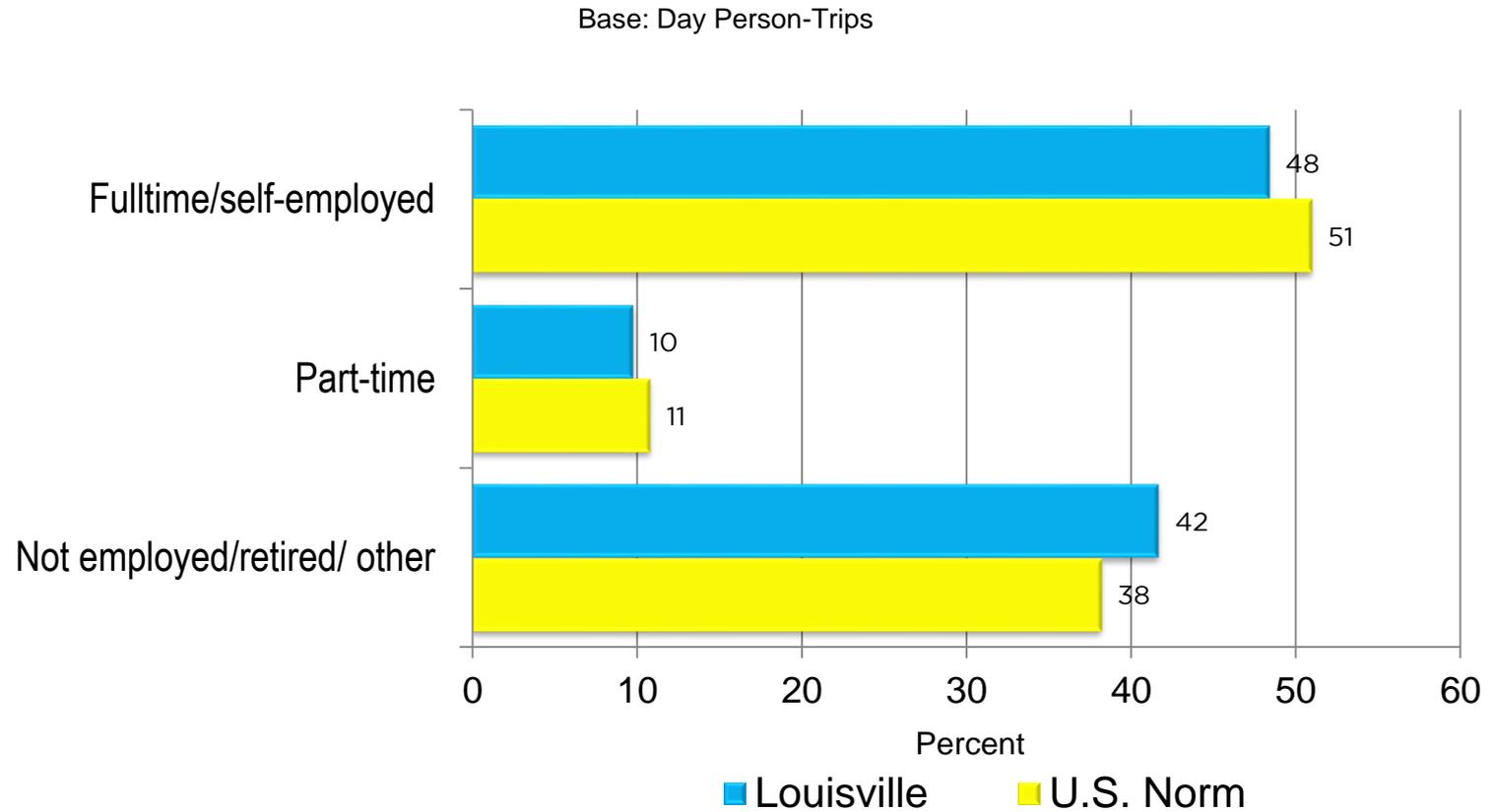
Children in Household



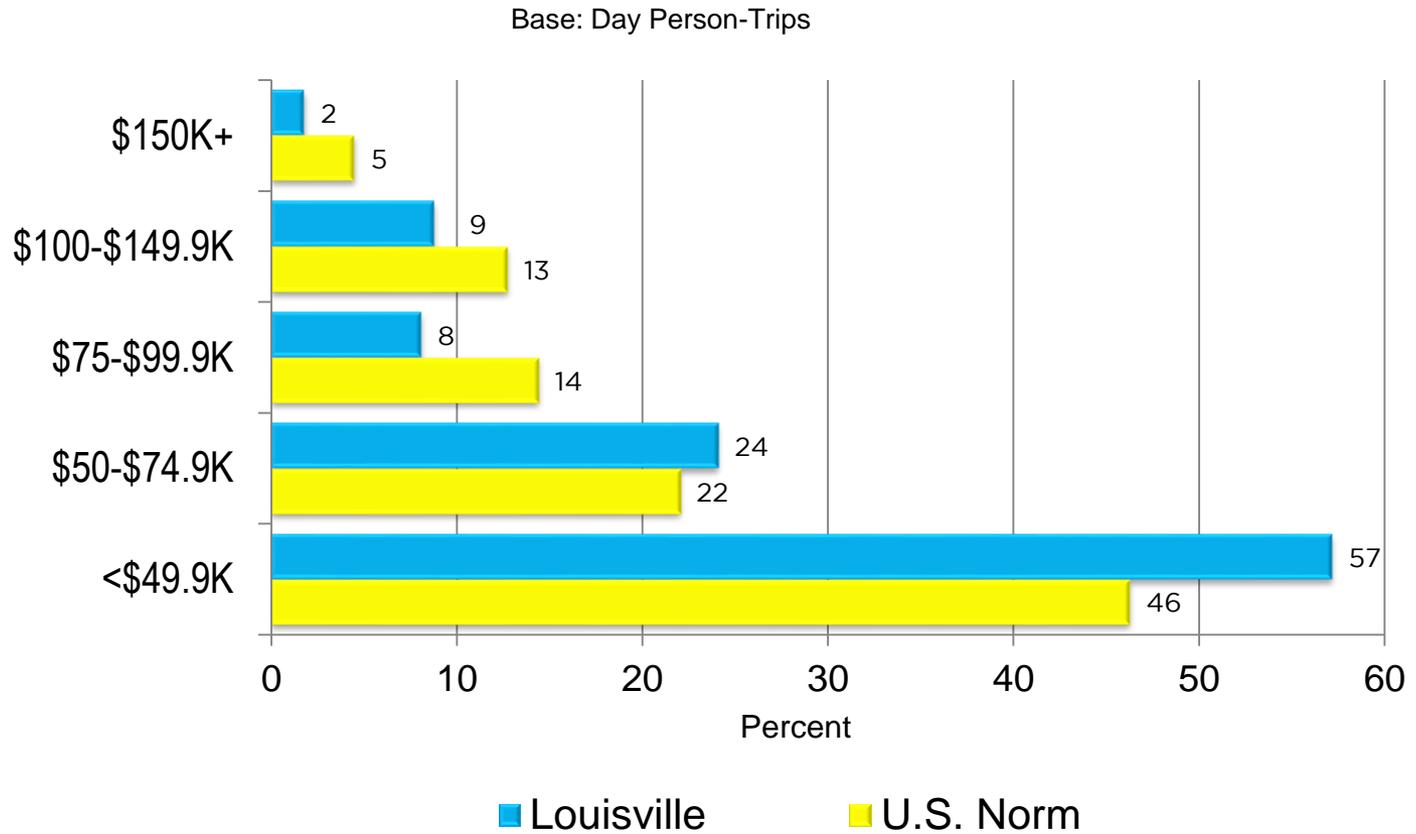
Education



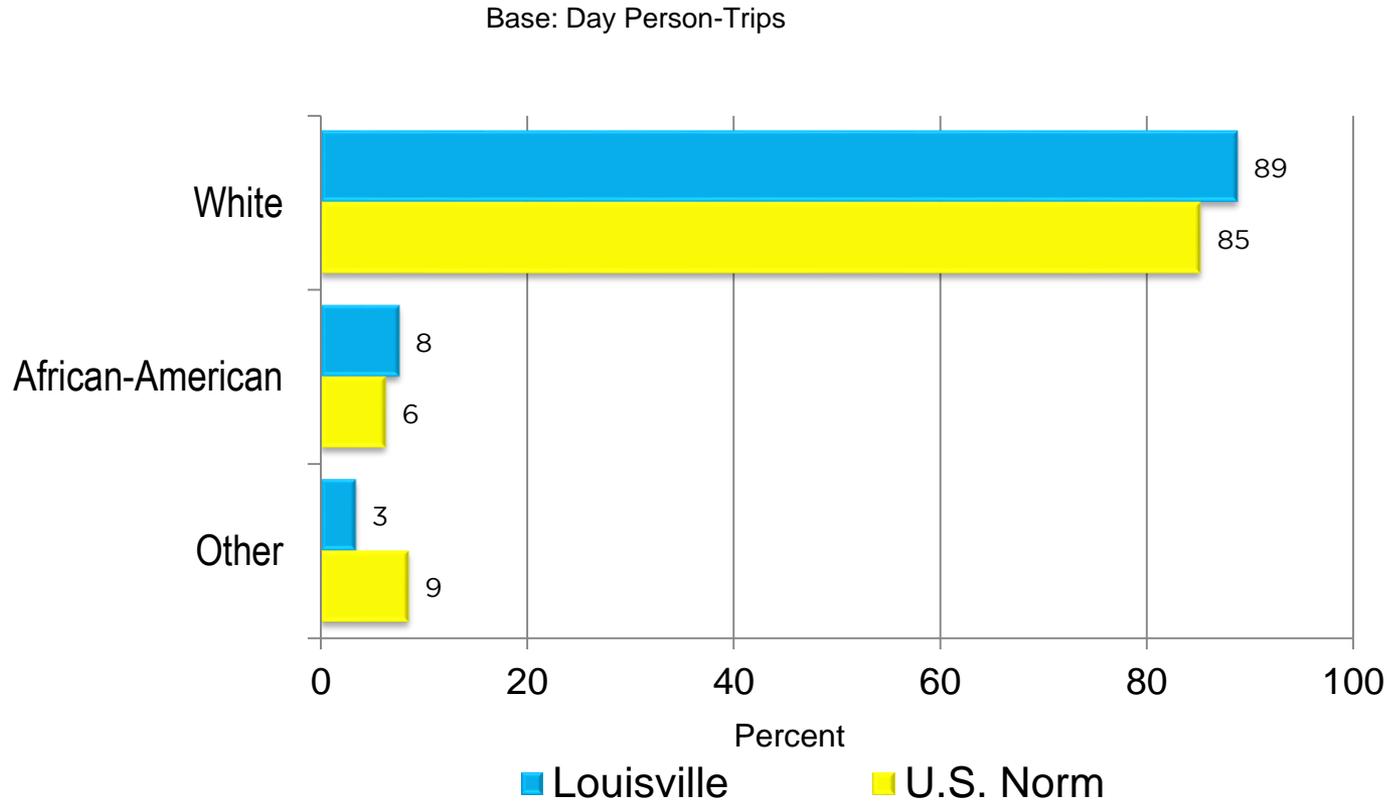
Employment



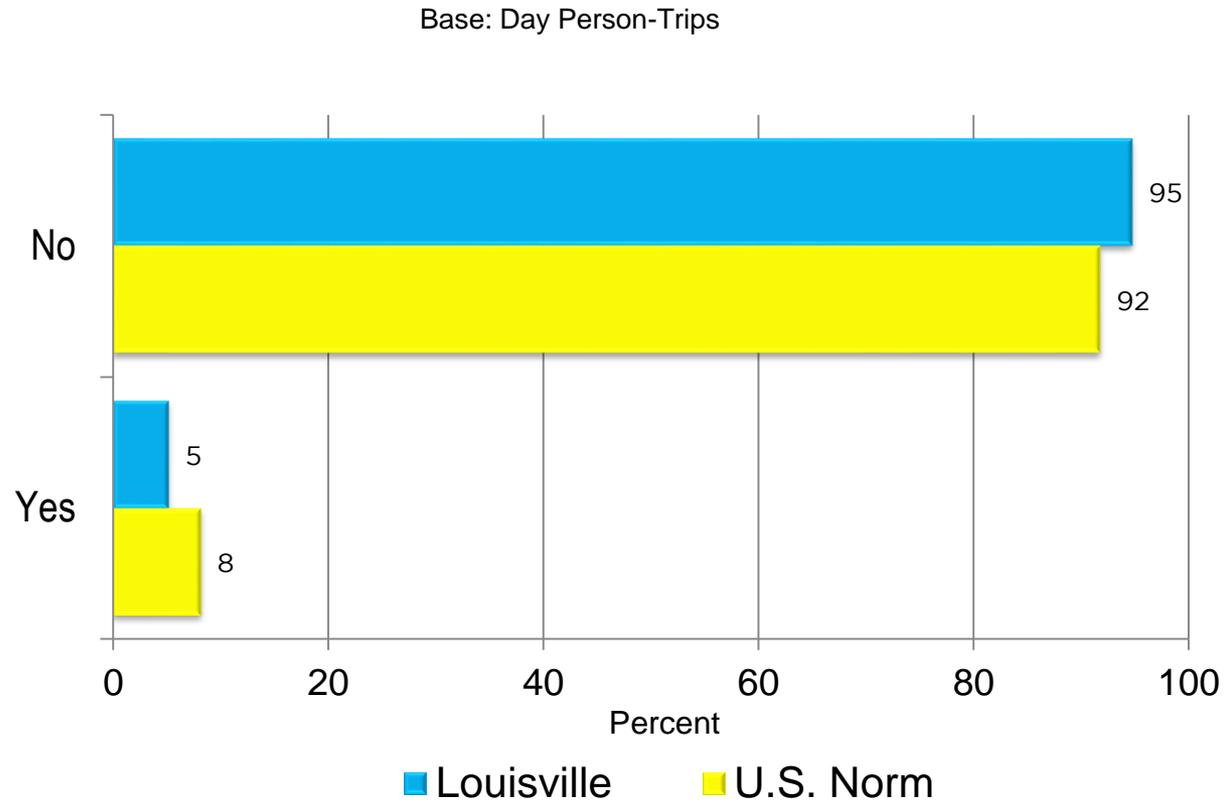
Household Income



Race



Hispanic Background





Appendix: 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

Marketable Trips:

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

- **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.