



## Jacksonville 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 Jacksonville'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 Jacksonville.
  - ✓ A profile of Jacksonville's performance within its overnight travel market.
  - ✓ Domestic visitor expenditures in Jacksonville.
  - ✓ Profiles of Jacksonville'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 the Jacksonville, the following sample was achieved in 2016:
  - 2016: 1,264 overnight trips and 337 day trips (1,601 total)
- 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, Jacksonville had 21.1 million person trips, increasing 3.4% from 2015. 47% were overnight trips and 53% were day trips.
- The overnight trips generated \$1.38 billion in spending, increasing 7.4% from 2015.
- When asked about the main purpose of their overnight trip, 43% responded that they were visiting friends and relatives, while 46% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip types were attending a special event and touring through the region.
- The top three states of origin for visitors on overnight trips to Jacksonville were Florida, Georgia, and New York. Among DMAs, the top three overnight visitor sources were Orlando, New York City, and Jacksonville.

# Key Findings (Cont'd)

- Two-thirds (66%) of visitors on an overnight trip to Jacksonville were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were quality of the food (60%) and friendliness of people (59%).
- Among those on overnight trips to Jacksonville, 73% have visited Jacksonville at least once before and 52% have visited in the past 12 months.
- Similar to the national average, approximately half (48%) of the overnight trips were planned two months or less before the trip. Slightly below the national average, 10% did not plan anything in advance.
- Advice from friends and relatives and hotels or resorts were the most common planning sources for a Jacksonville overnight trip. Hotels or resorts and online travel agencies were also the most common booking sources.



# Key Findings (Cont'd)

- The average number of nights spent in Jacksonville on an overnight trip was 2.7 nights, up from 3.0 nights in 2015.
- Two-thirds (67%) of overnight Jacksonville travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight trip to Jacksonville were shopping, going to the beach, fine dining, swimming, and theme park.

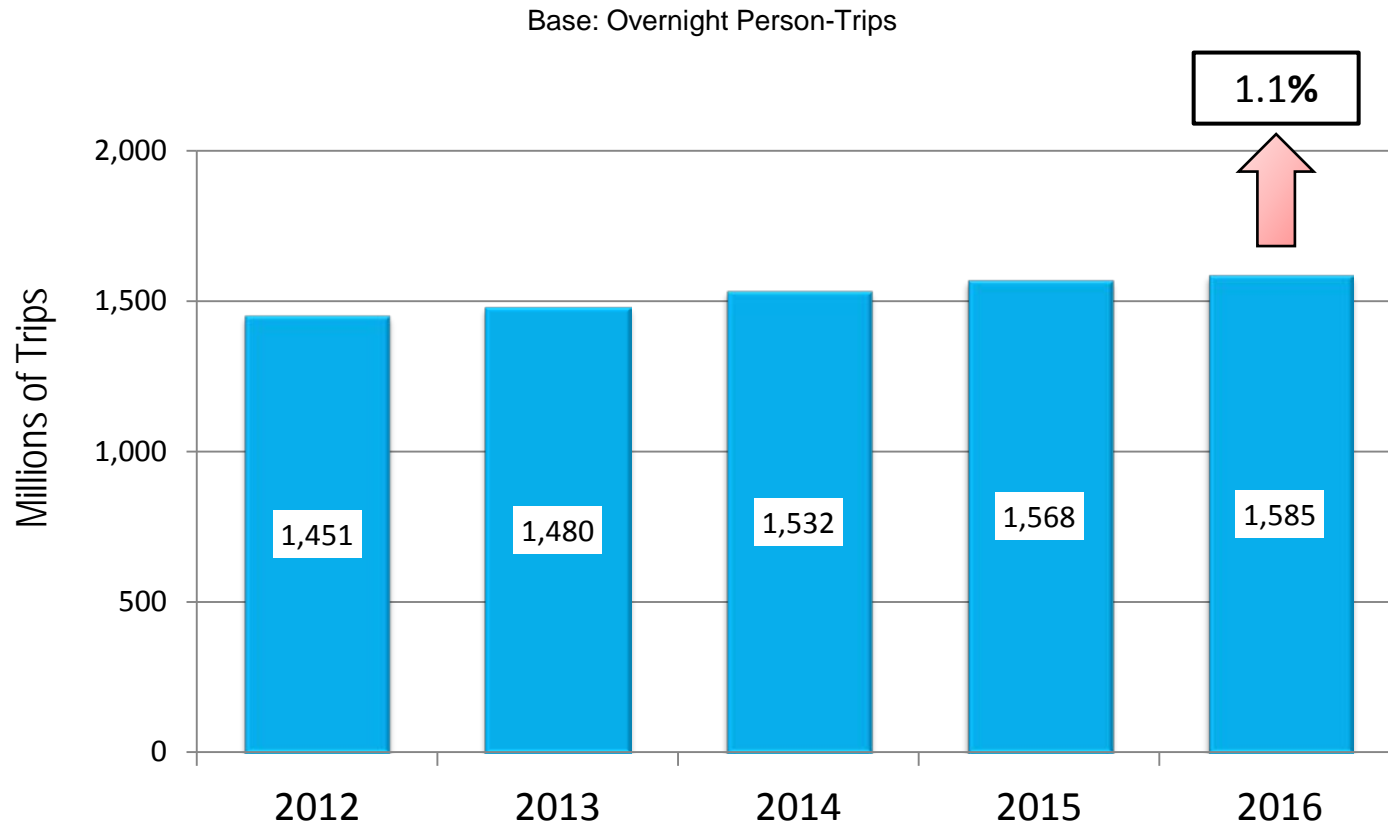


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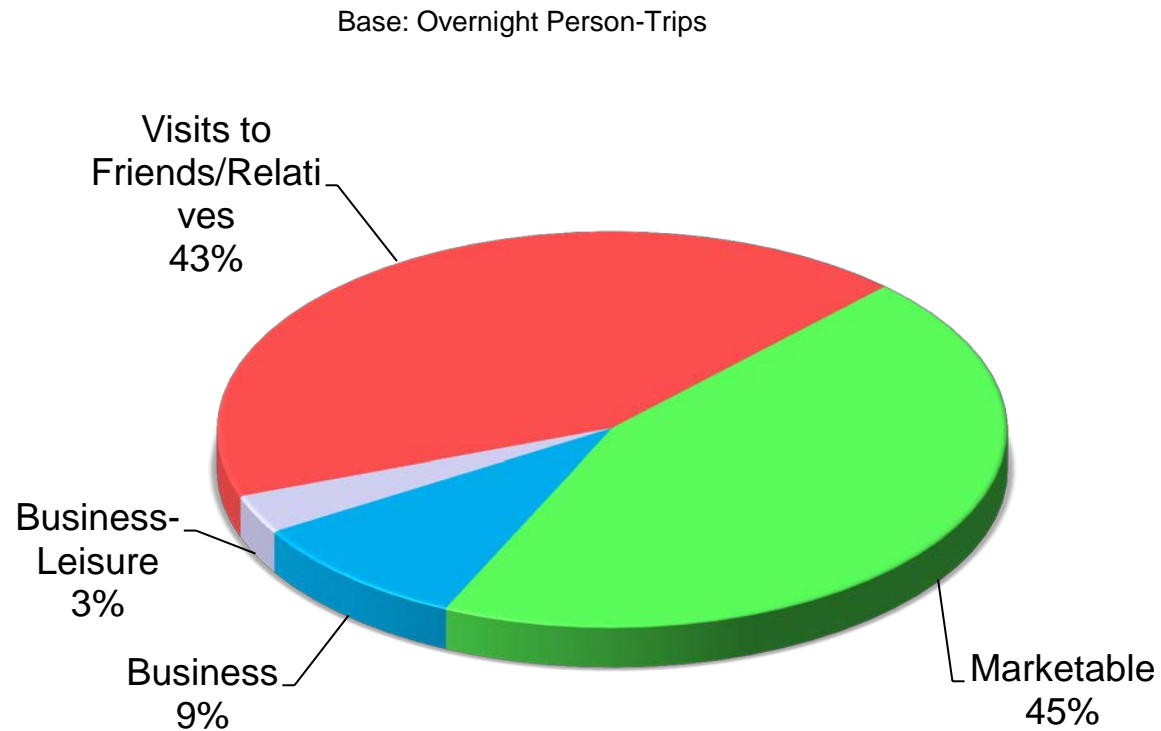
## Size & Structure of the U.S. Travel Market



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

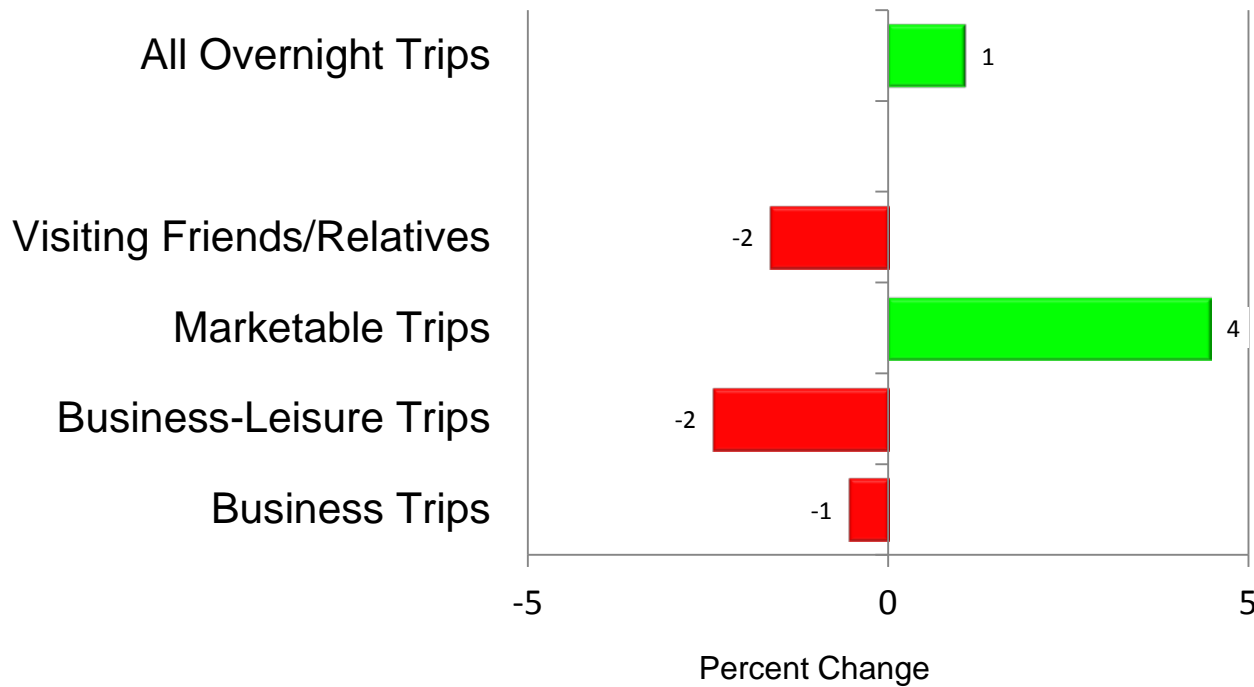


# Structure of the U.S. Travel Market — 2016 Overnight Trips



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

Base: Overnight Person-Trips





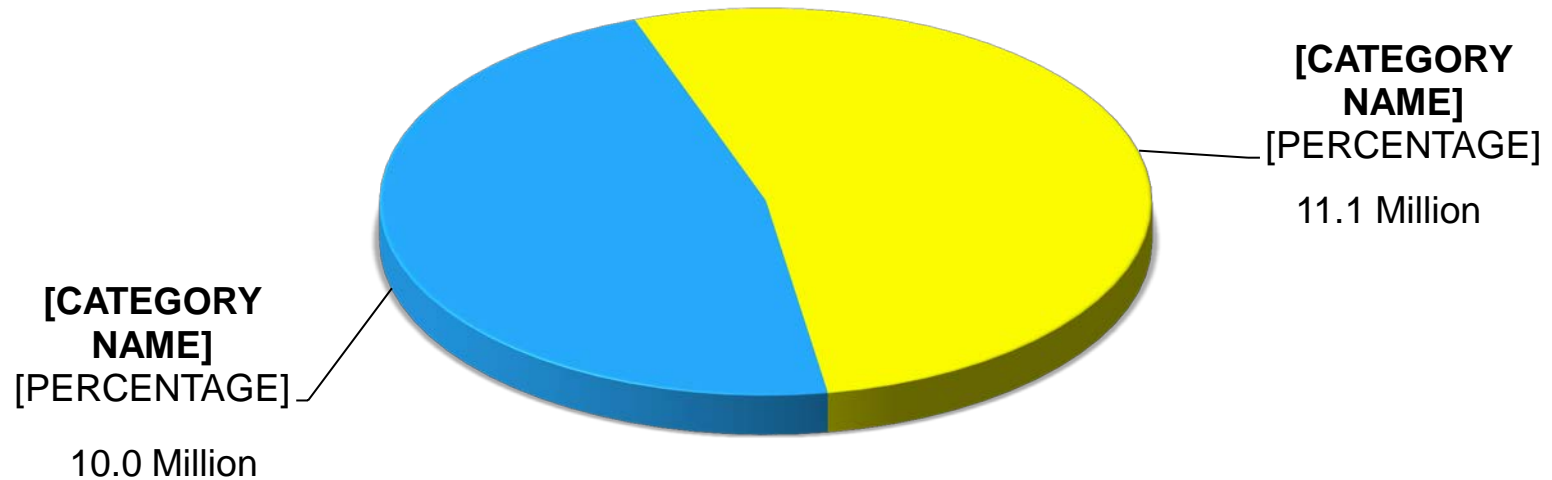
## Size & Structure of Jacksonville's Domestic Travel Market



# Total Size of Jacksonville 2016 Domestic Travel Market

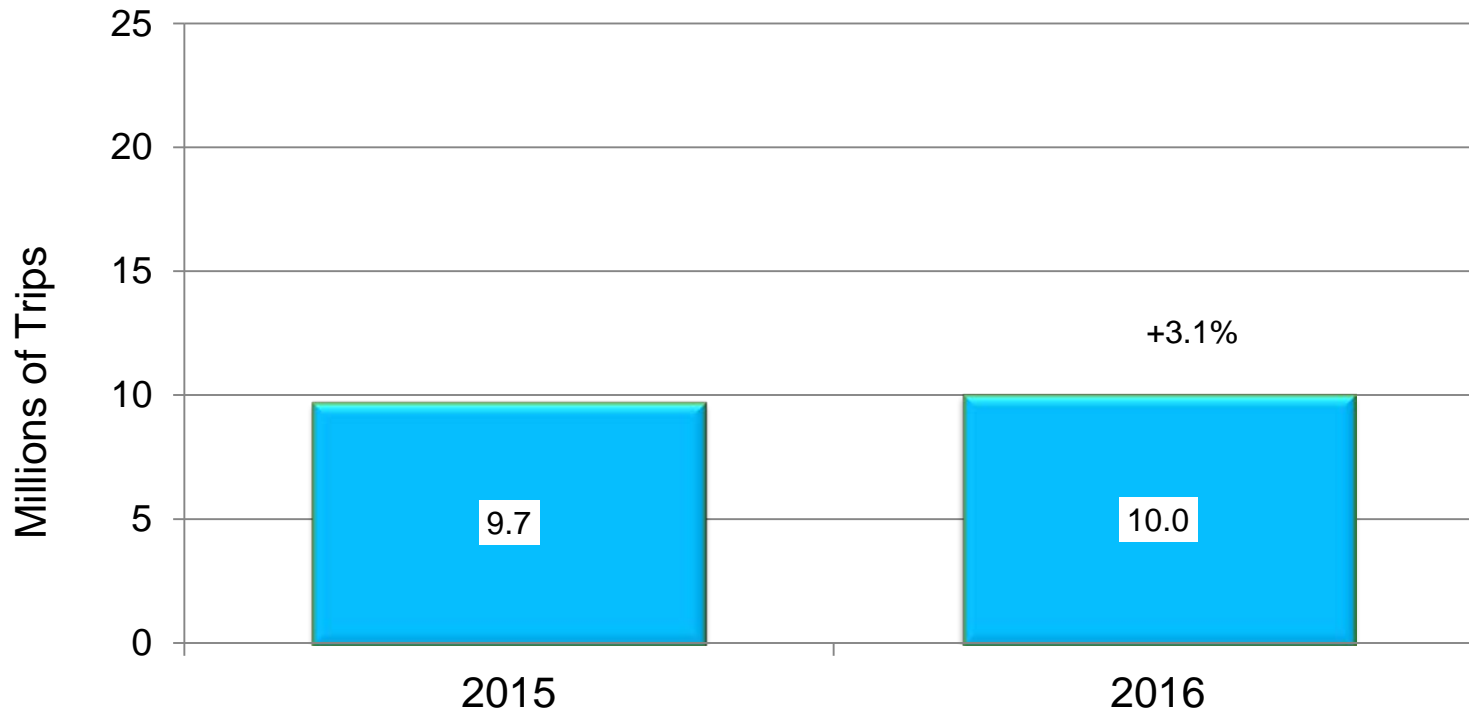
Total Person-Trips = 21.1 Million

+3.4% vs. 2015



# Overnight Trips to Jacksonville

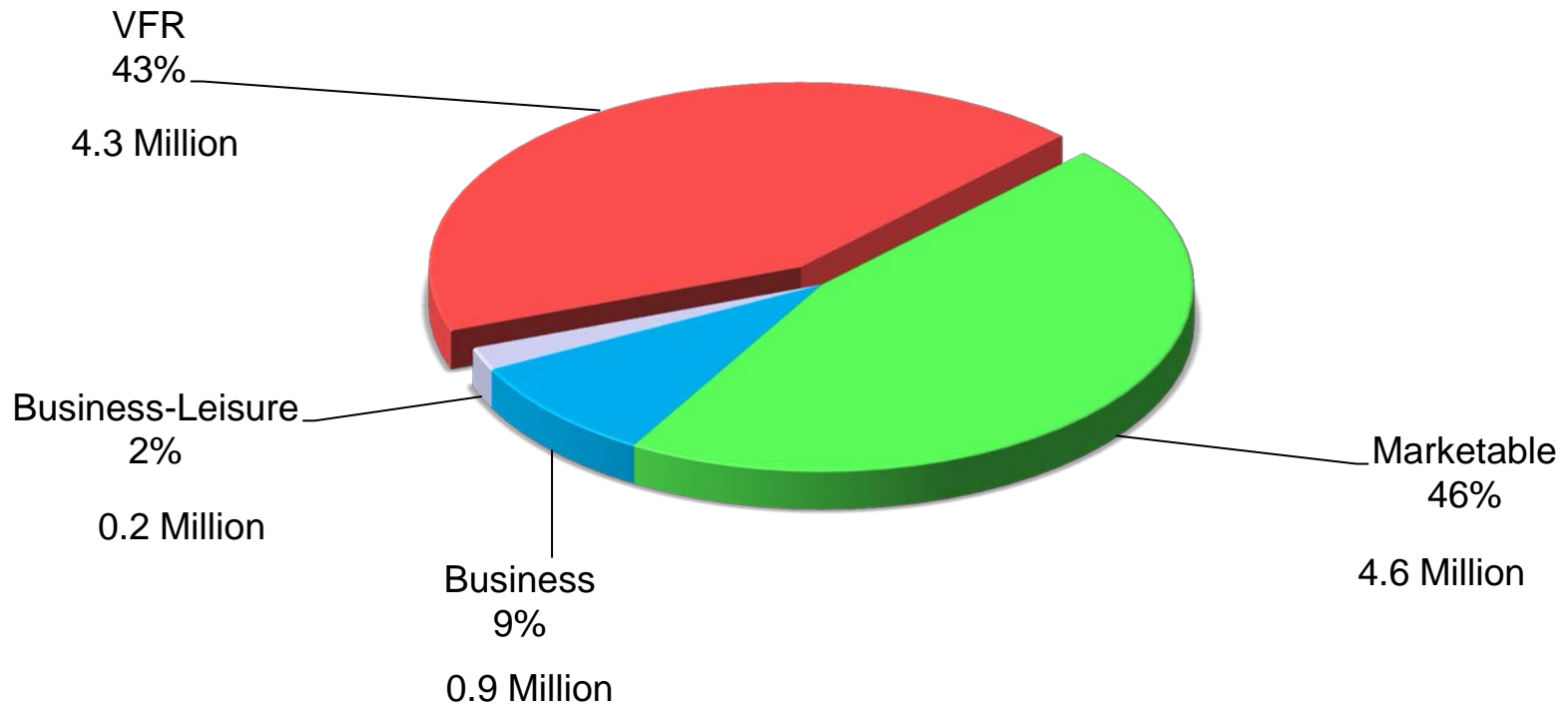
Base: Overnight Person-Trips





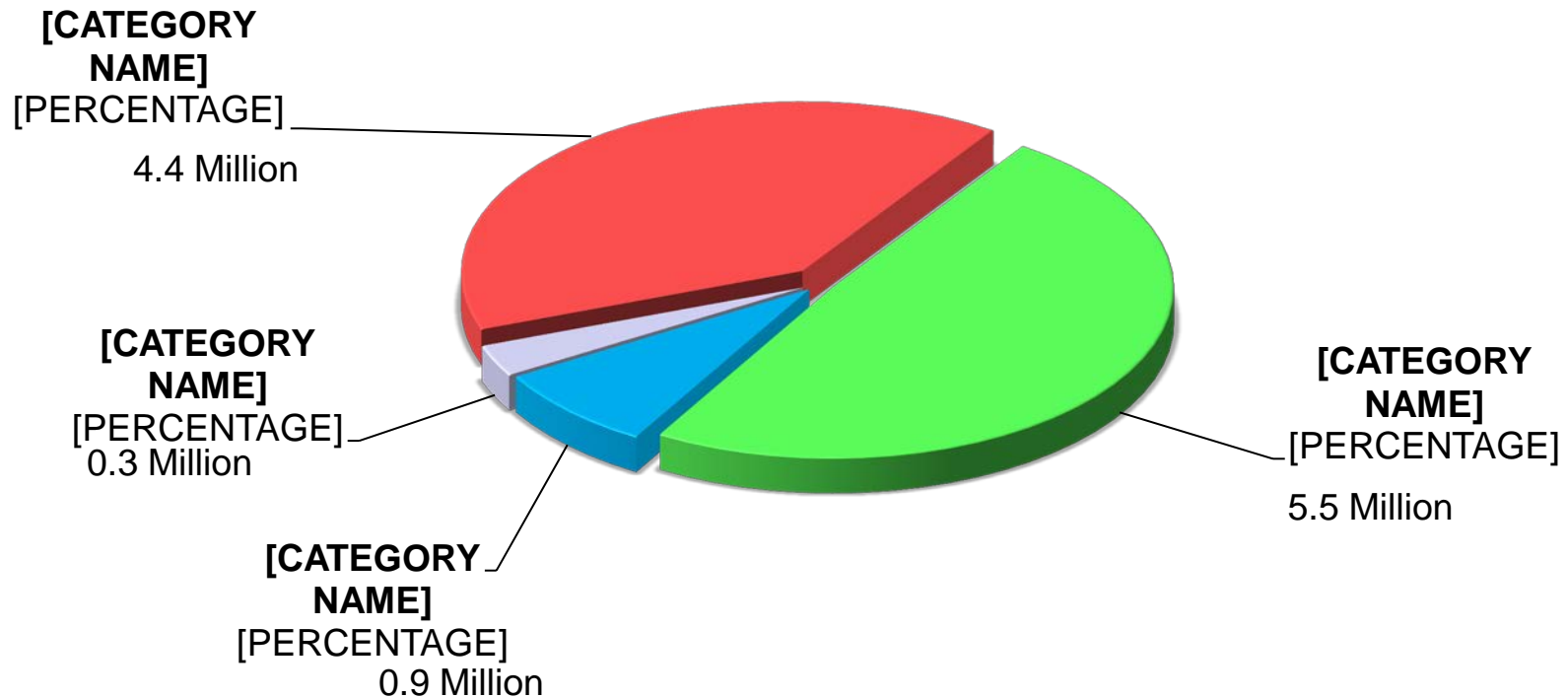
# Jacksonville 2016 Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 10.0 Million



# Jacksonville 2016 Day Travel Market — by Trip Purpose

Total Day Person-Trips = 11.1 Million





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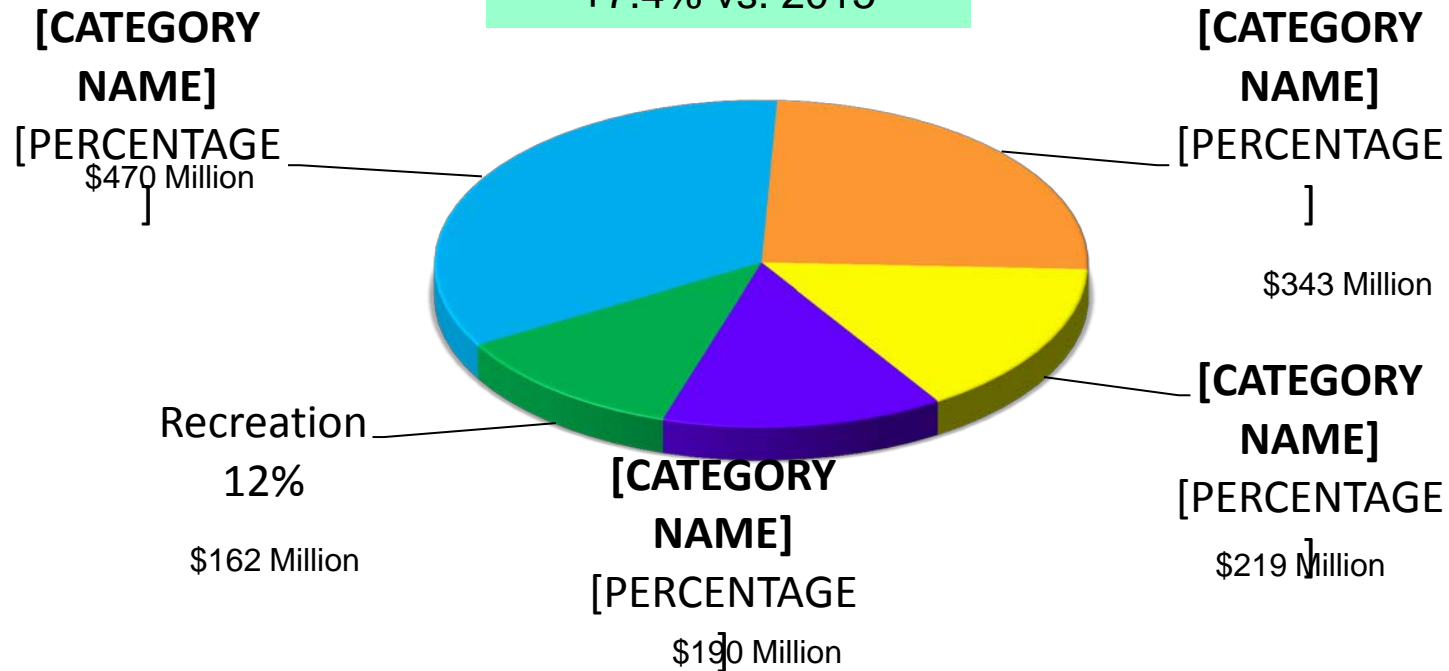
# Overnight Trip Expenditures



# 2016 Domestic Overnight Expenditures — by Sector

Total Spending = \$1.38 Billion

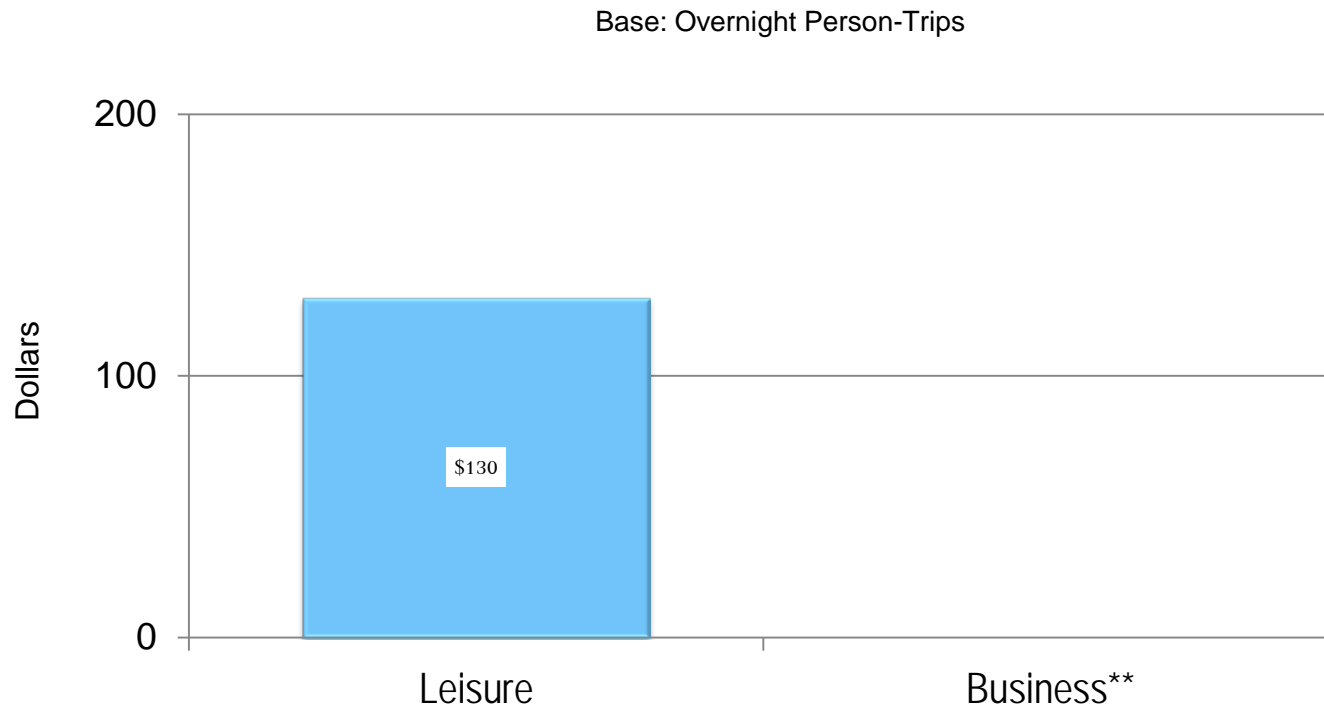
+7.4% vs. 2015



# 2016 Average Per Person Expenditures on Domestic Overnight Trips — By Sector



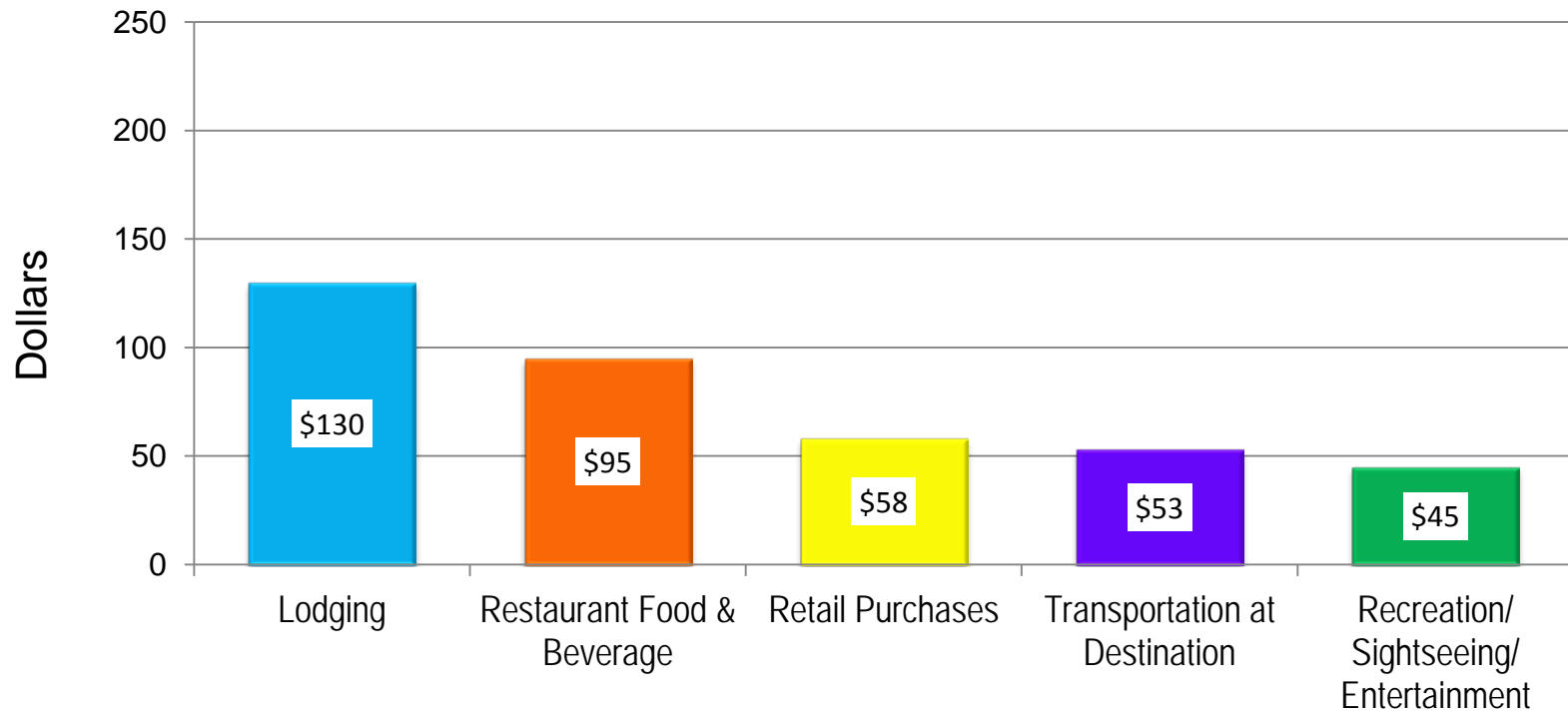
# 2016 Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose



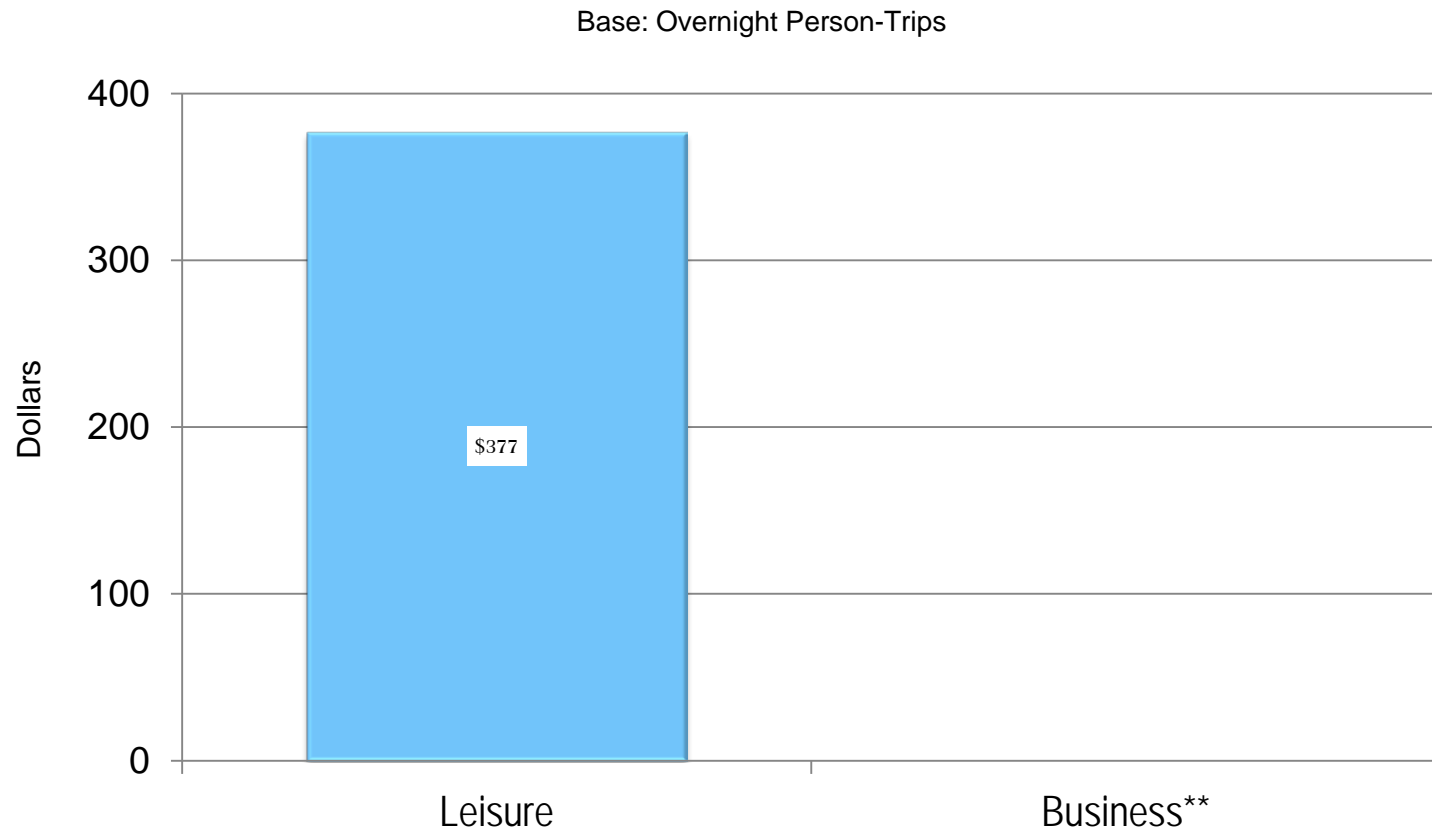
\* Low base sizes

# 2016 Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Overnight Person-Trips to Jacksonville



# 2016 Average Per Party Expenditures on Domestic Overnight Trips — by Trip Purpose



\* Low base sizes





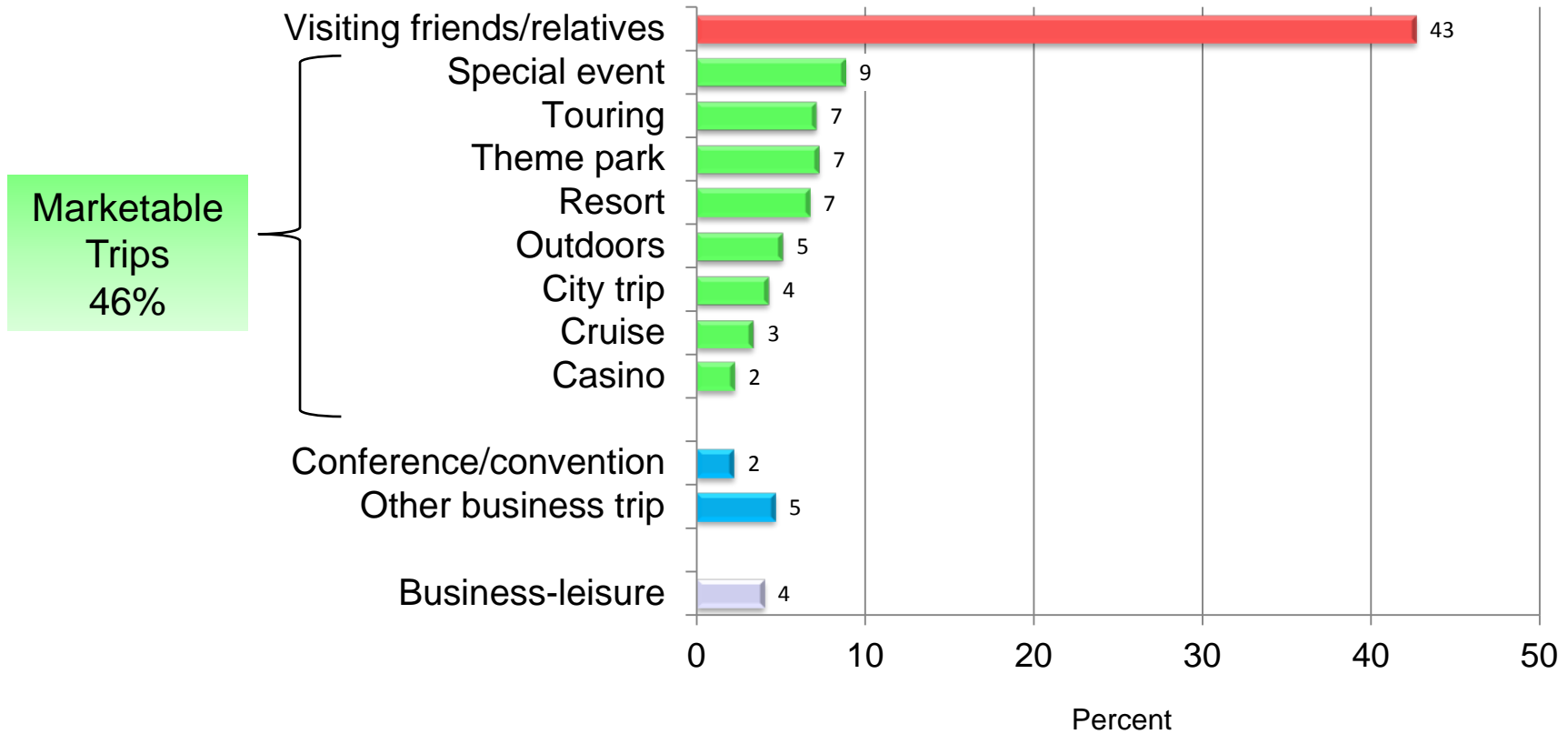
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## Overnight Trip Characteristics



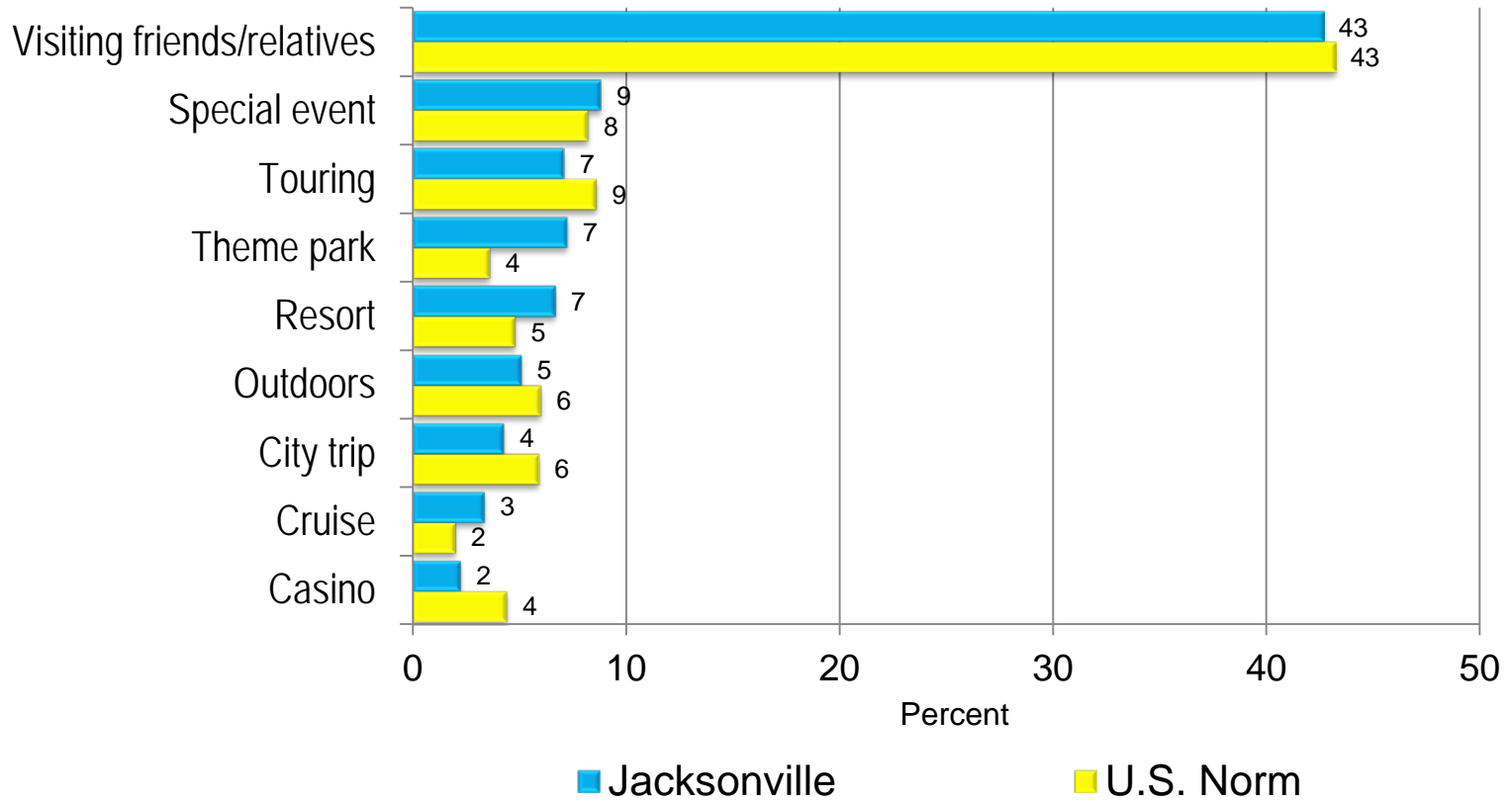
# 2016 Main Purpose of Trip

Base: Overnight Person-Trips to Jacksonville



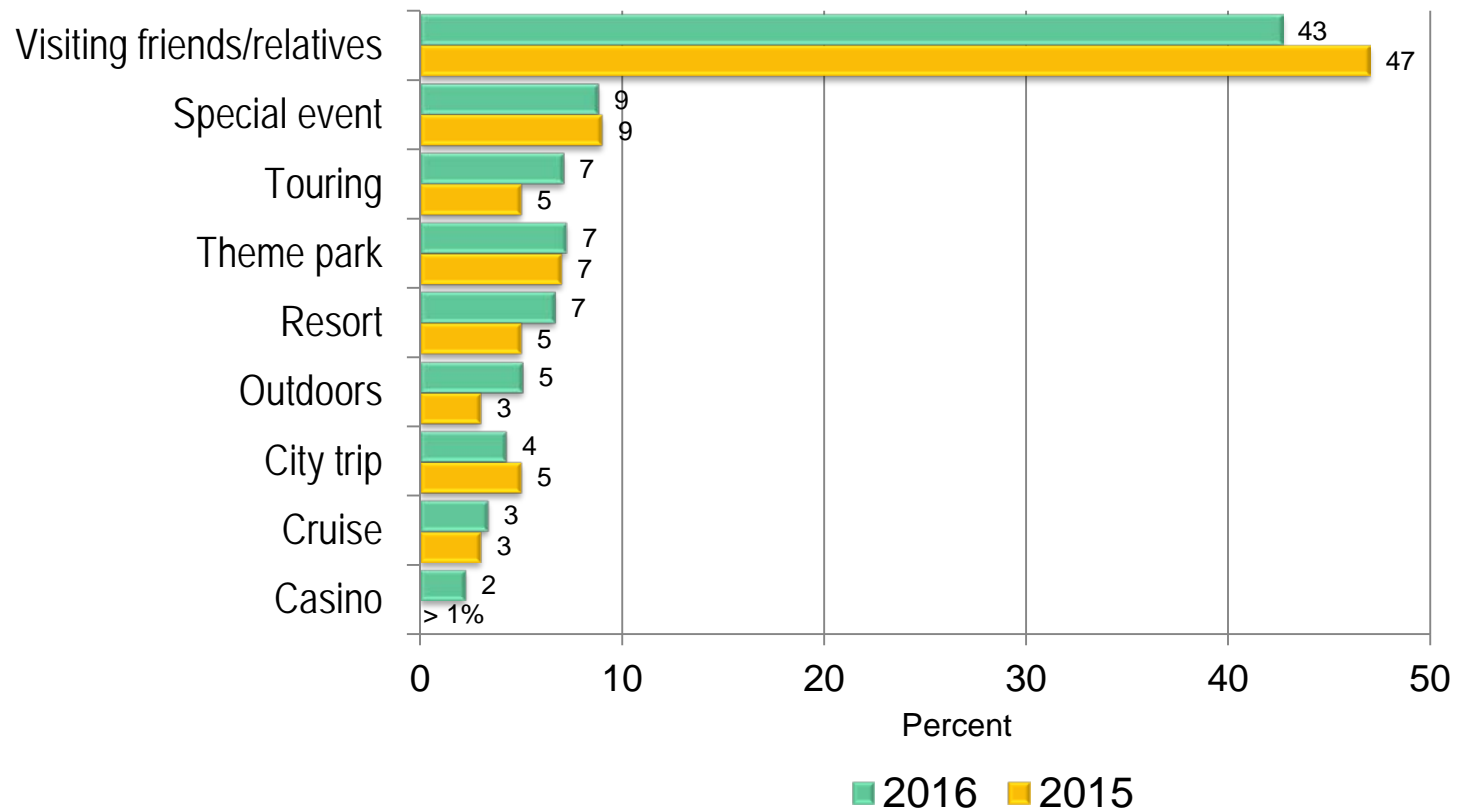
# Main Purpose of Leisure Trip

Base: Overnight Person-Trips

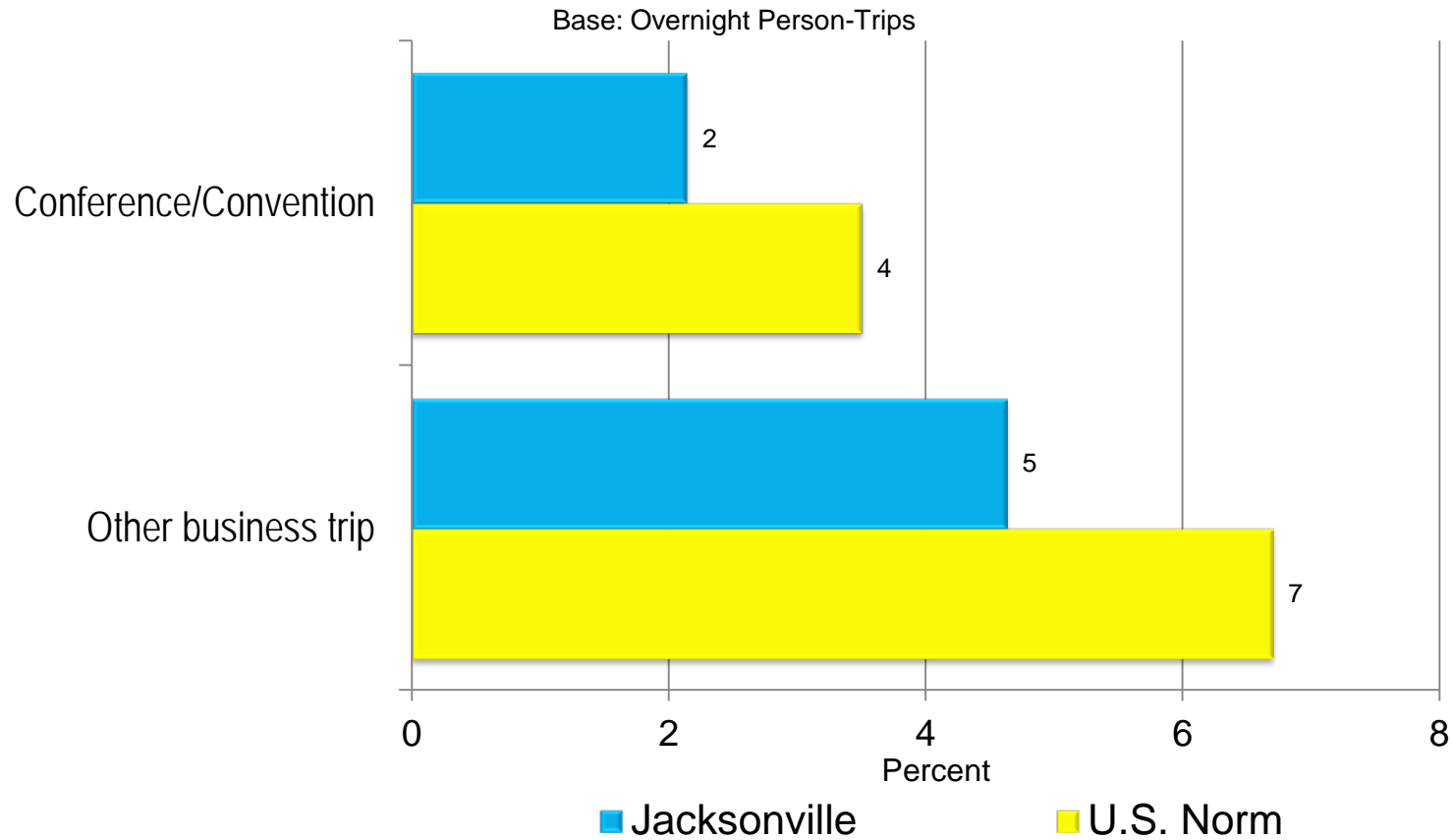


# Main Purpose of Overnight Leisure Trip – 2016 vs. 2015

Base: Overnight Person-Trips to Jacksonville

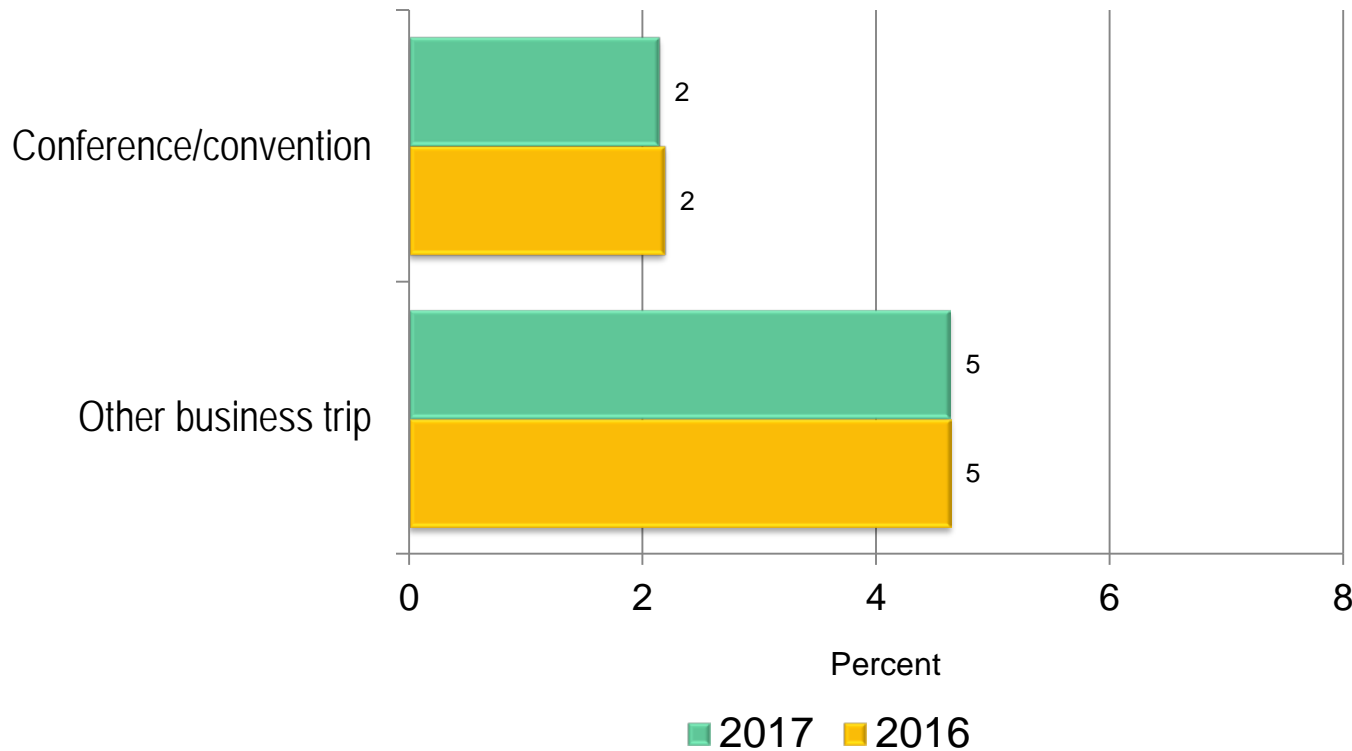


# Main Purpose of Business Trip



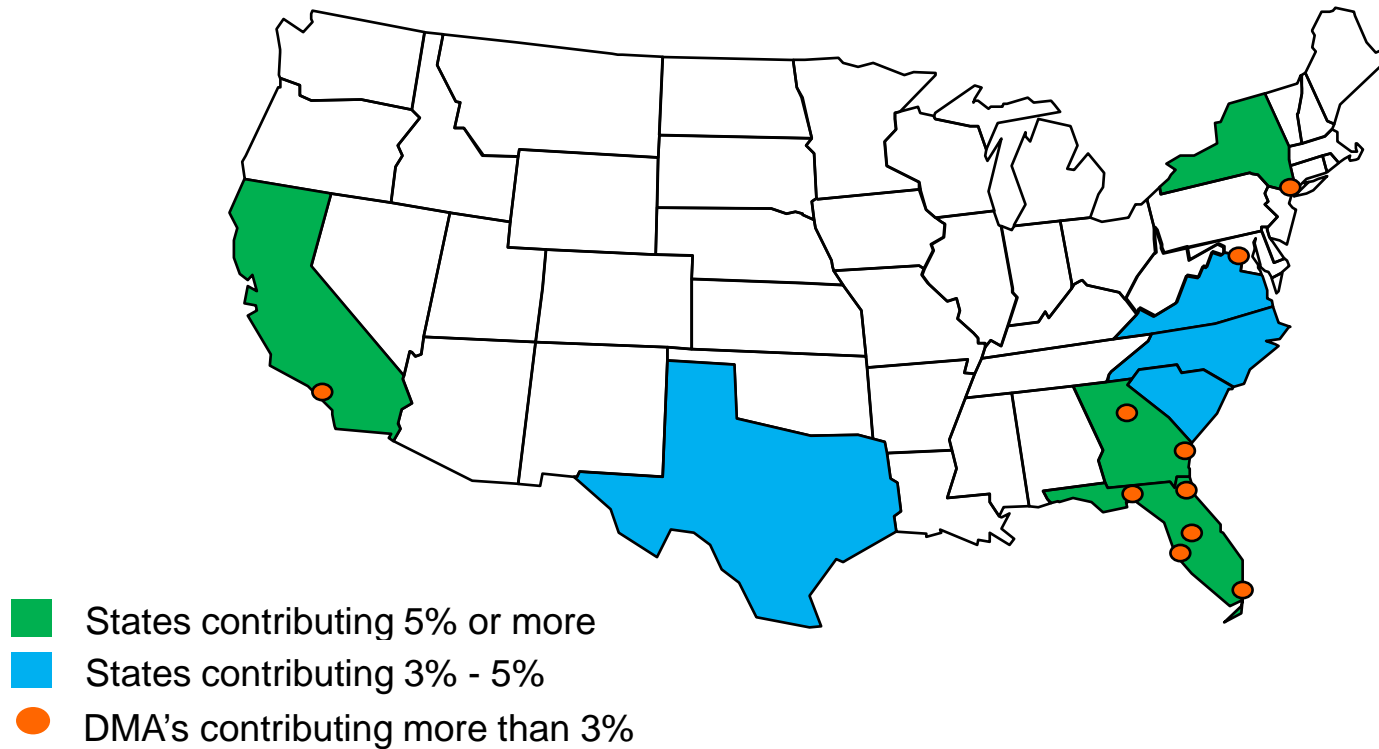
# Main Purpose of Overnight Business Trip – 2017 vs. 2016

Base: Overnight Person-Trips to Jacksonville



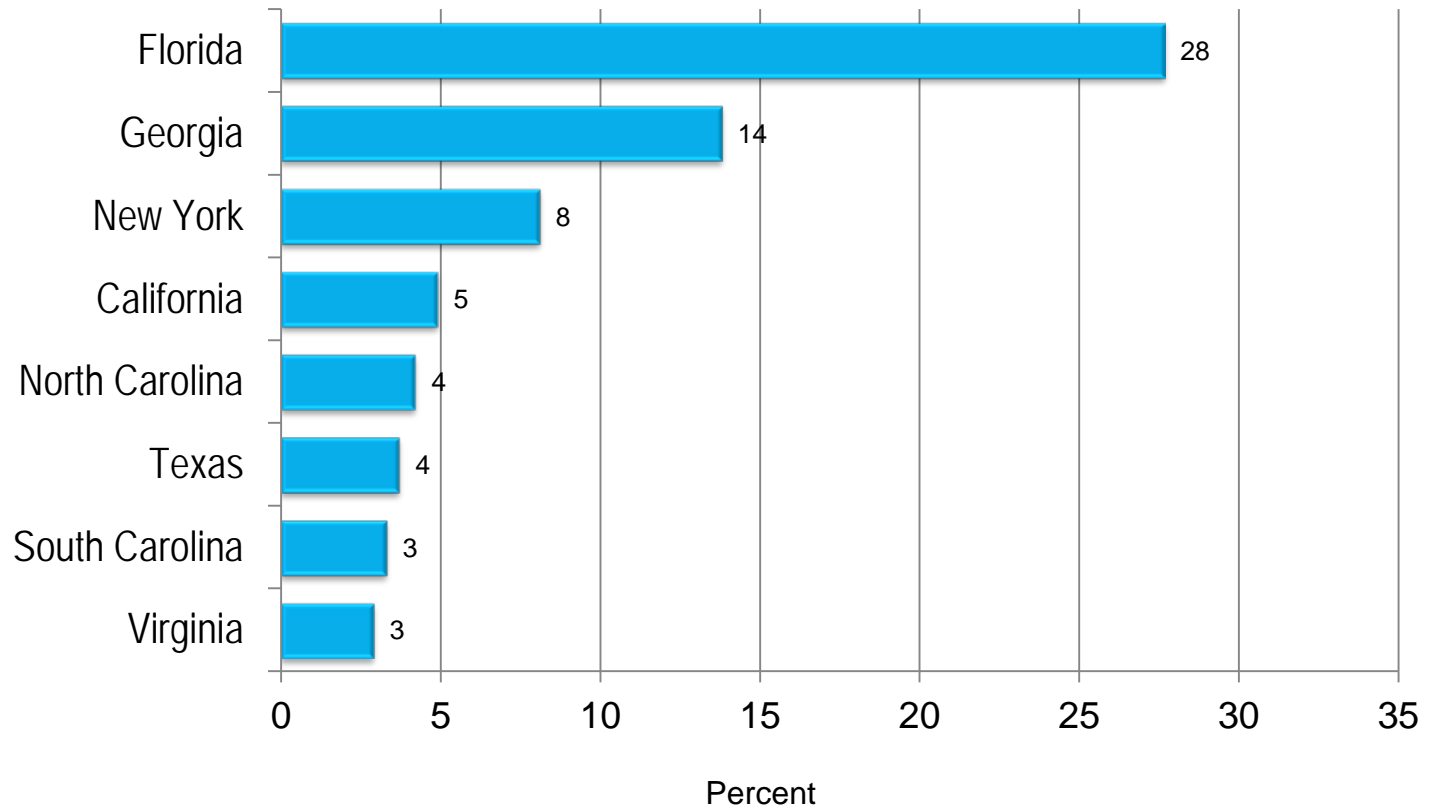
# Sources of 2016 Business

Base: Overnight Person-Trips to Jacksonville



# 2016 State Origin Of Trip

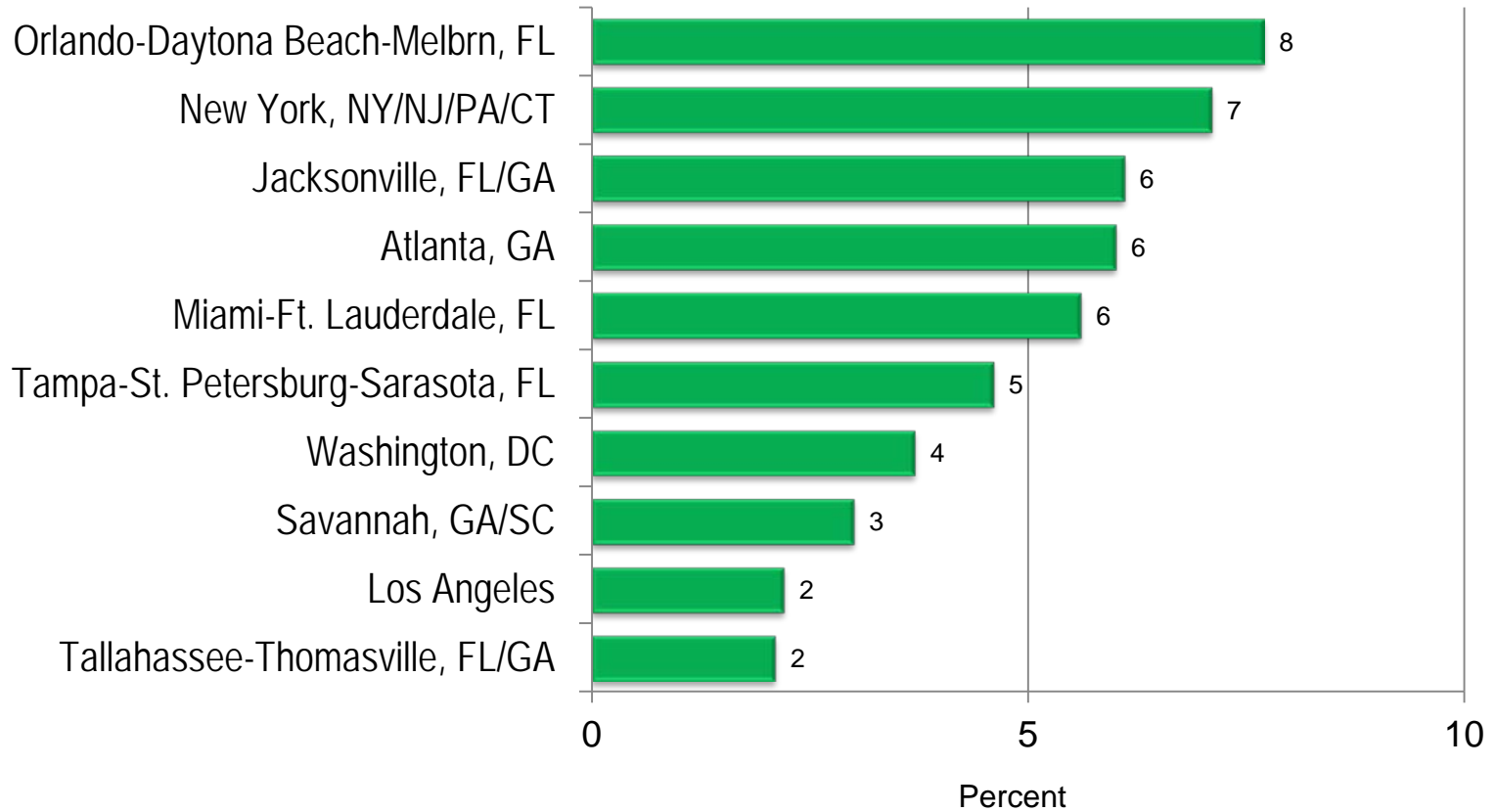
Base: Overnight Person-Trips to Jacksonville





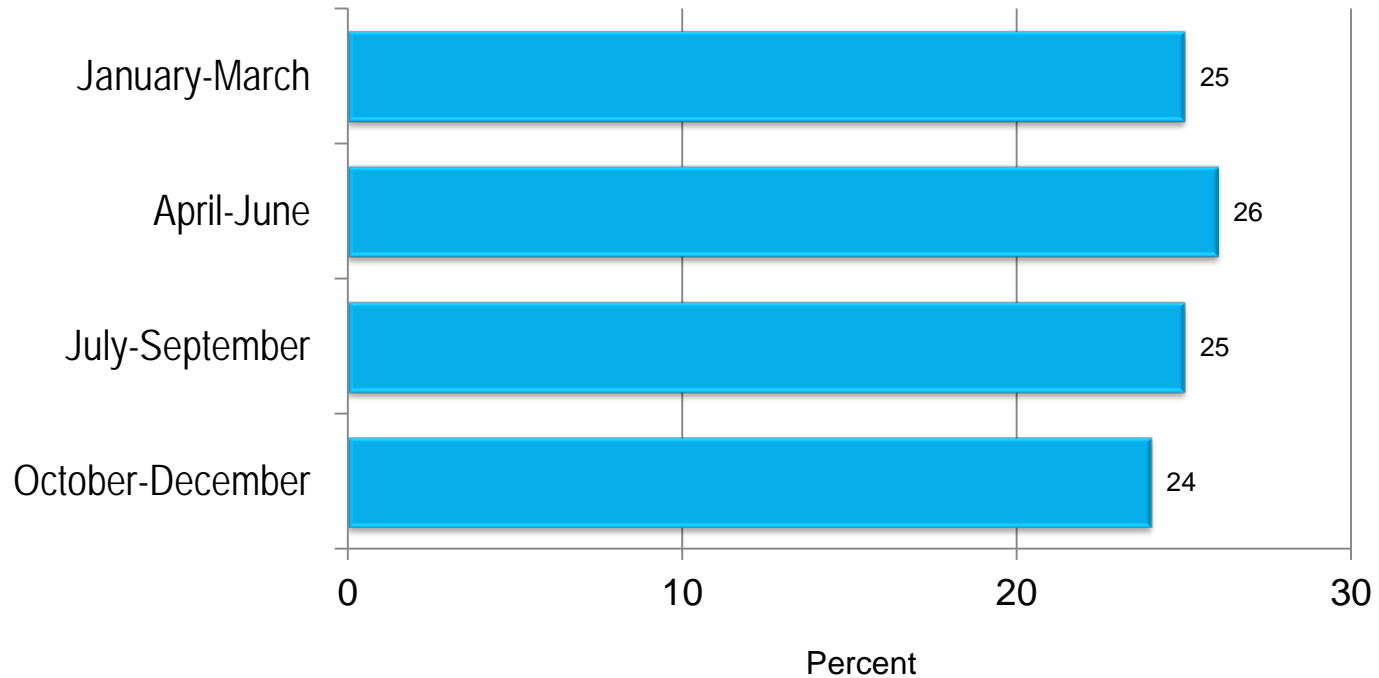
# 2016 DMA Origin Of Trip

Base: Overnight Person-Trips to Jacksonville

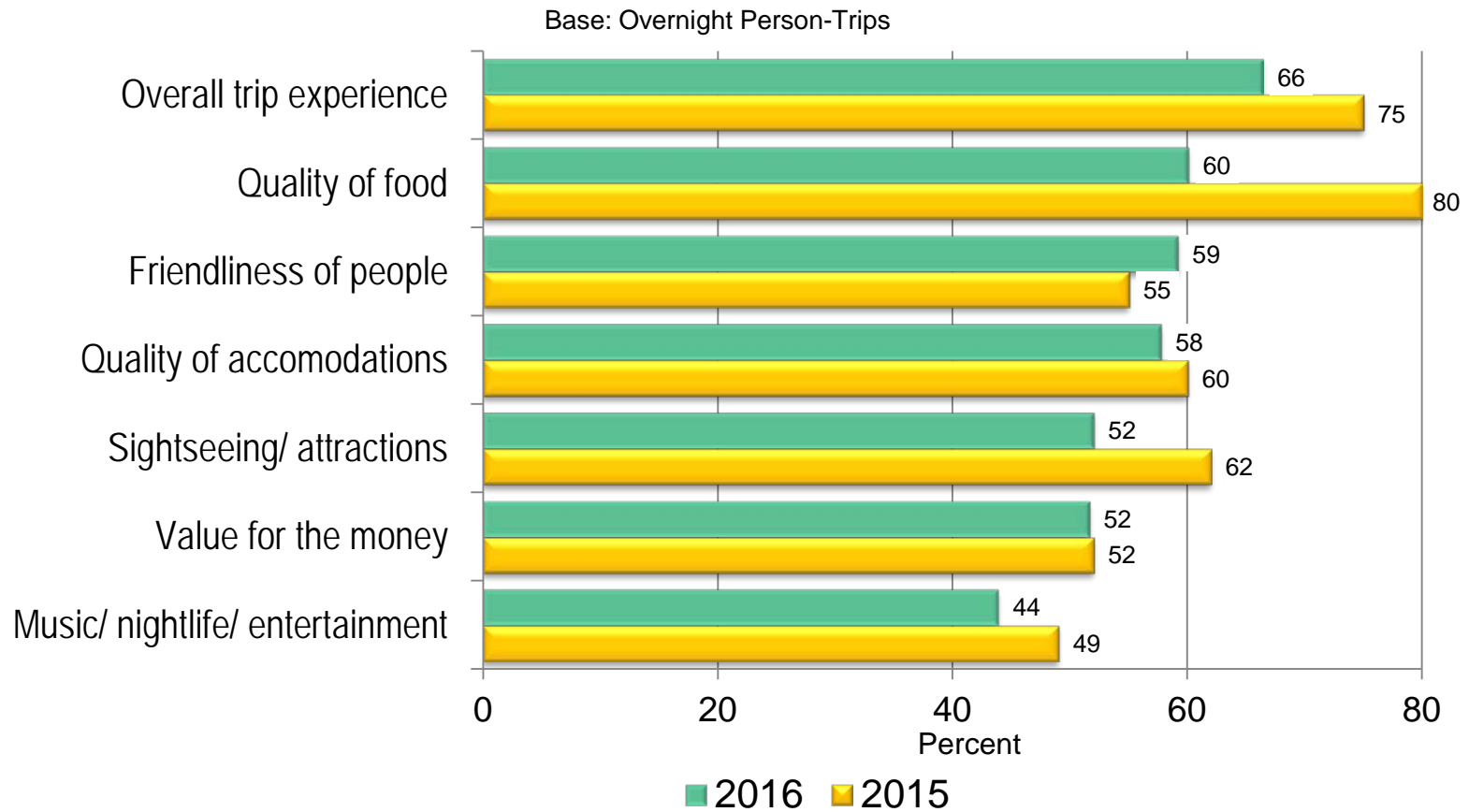


# 2016 Season of Trip

Base: Overnight Person-Trips to Jacksonville

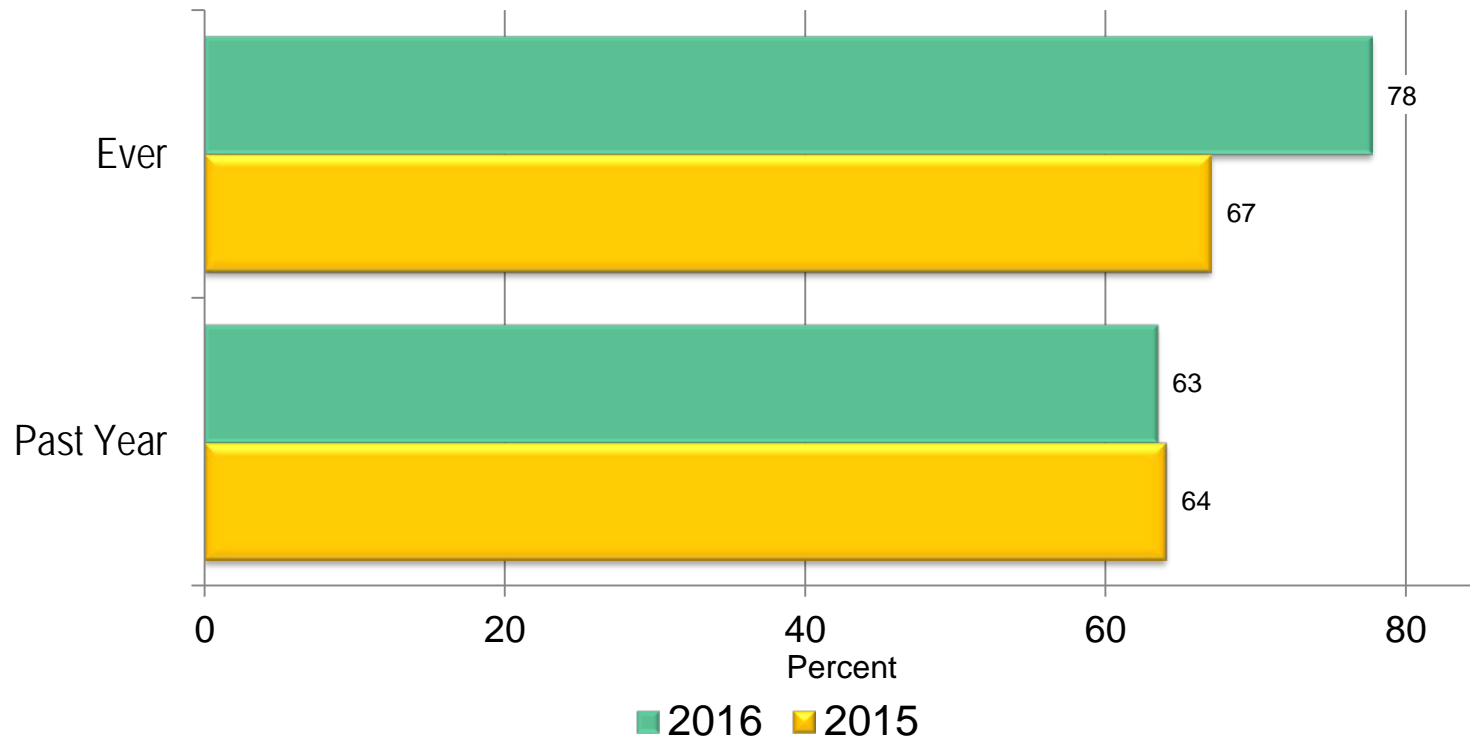


# % Very Satisfied with Trip

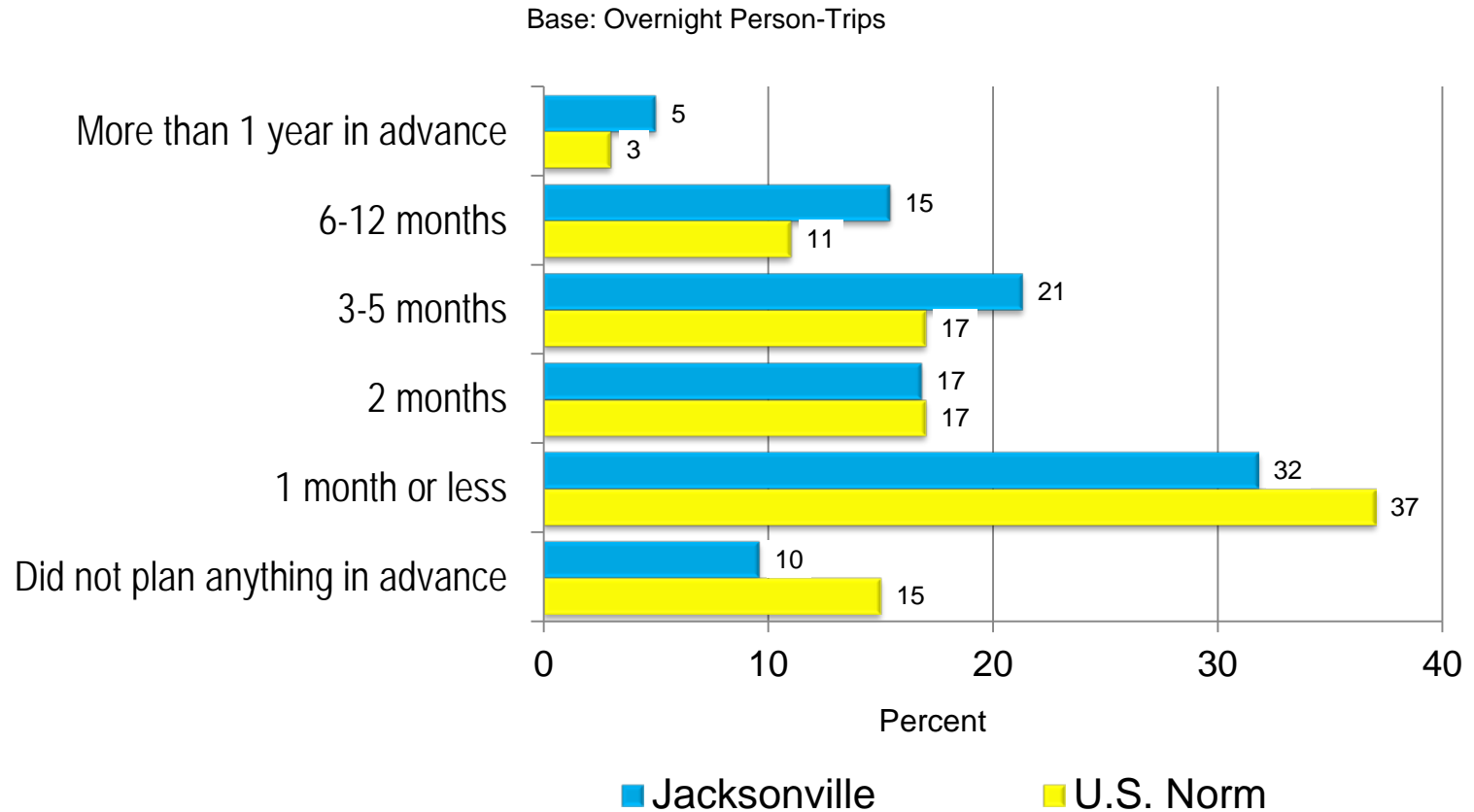


# Past Visitation to Jacksonville

Base: Overnight Person-Trips

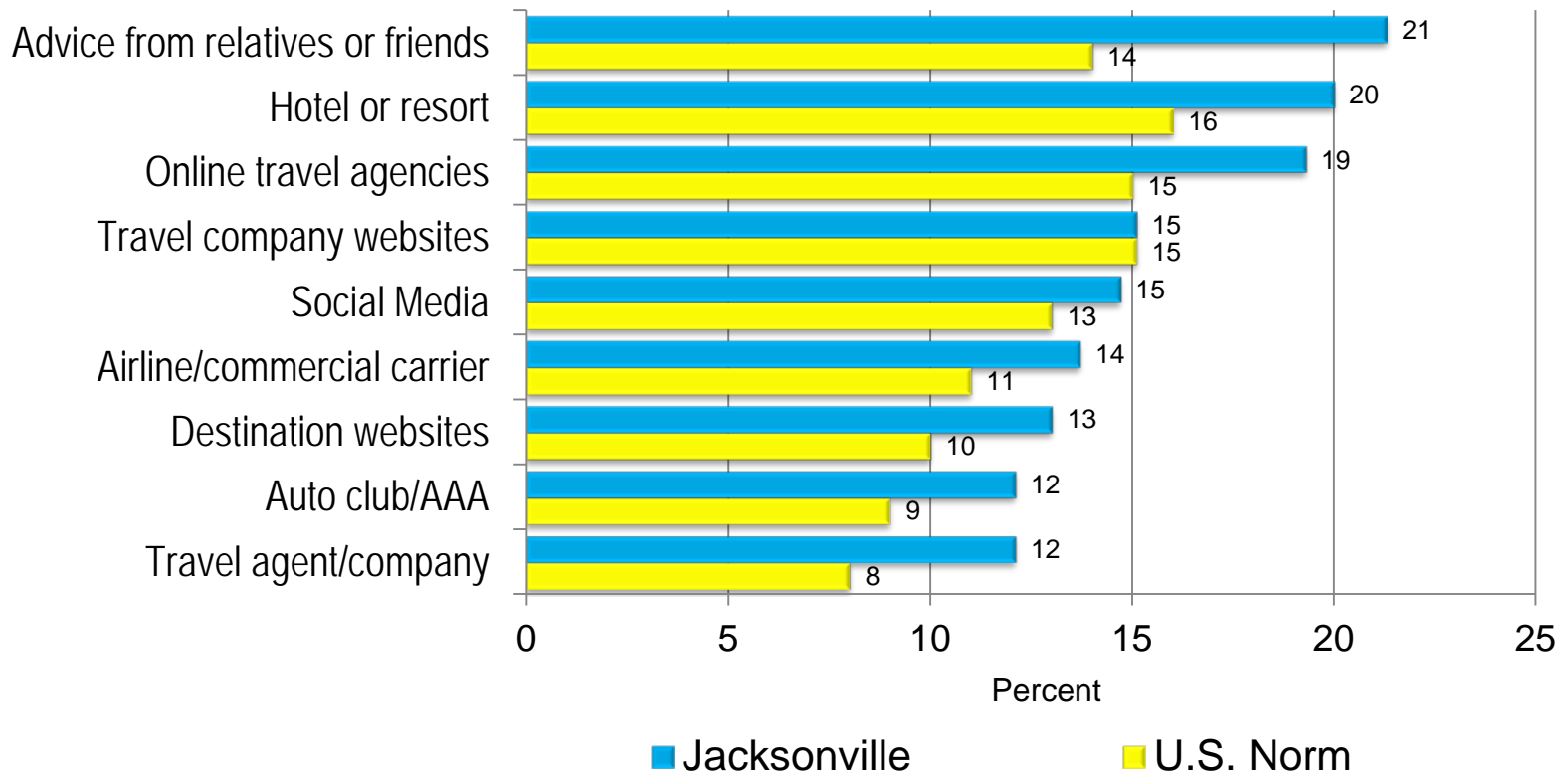


# Length of Trip Planning

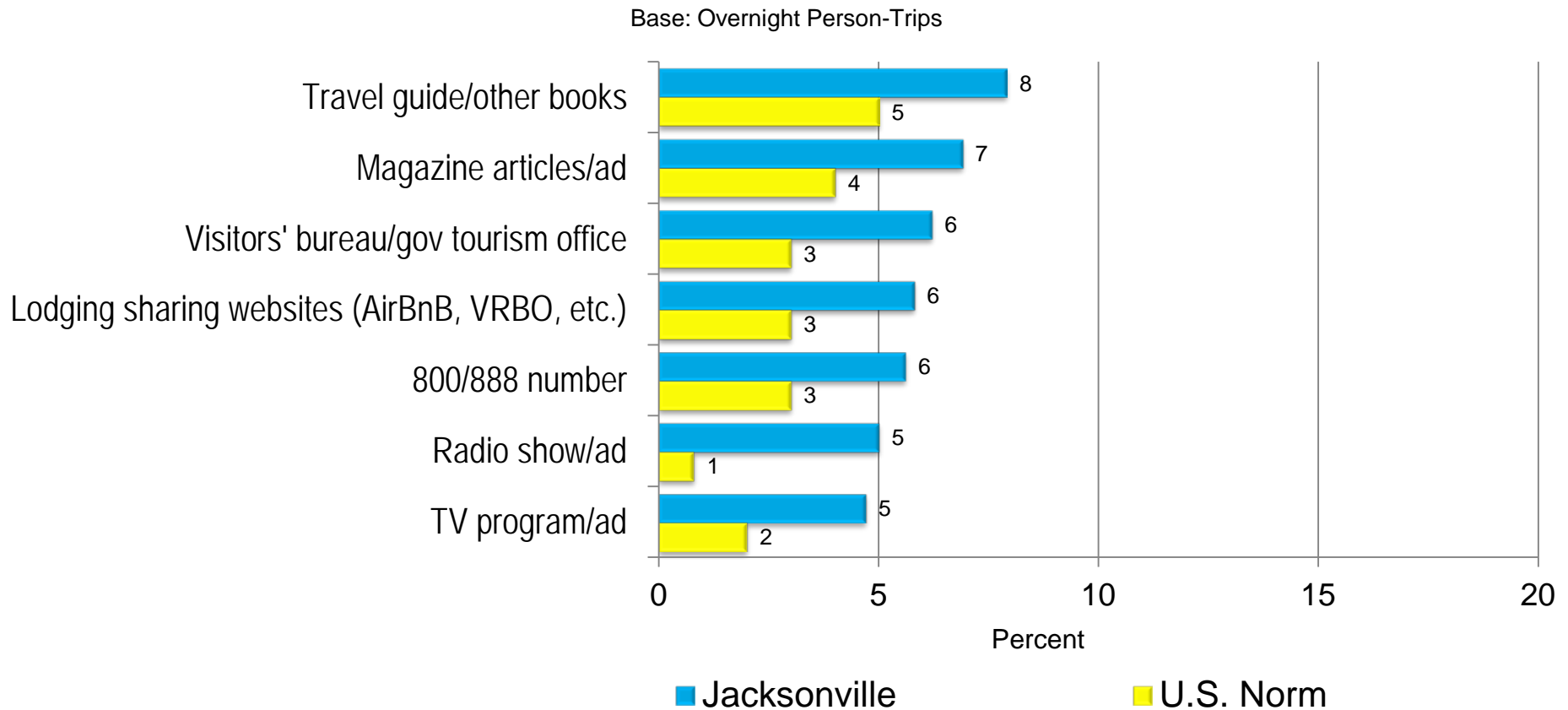


# Trip Planning Information Sources

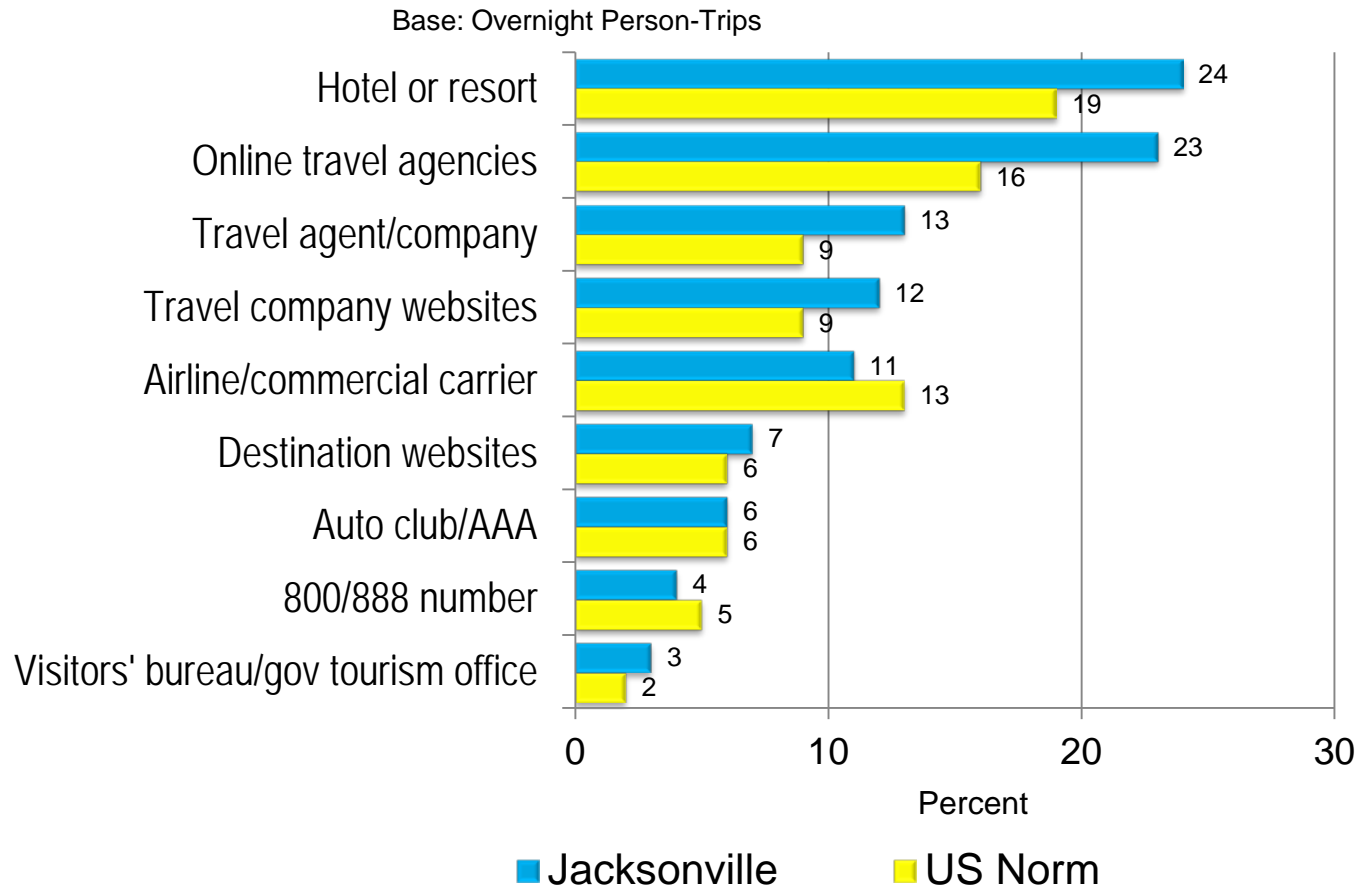
Base: Overnight Person-Trips



# Trip Planning Information Sources (Cont'd)

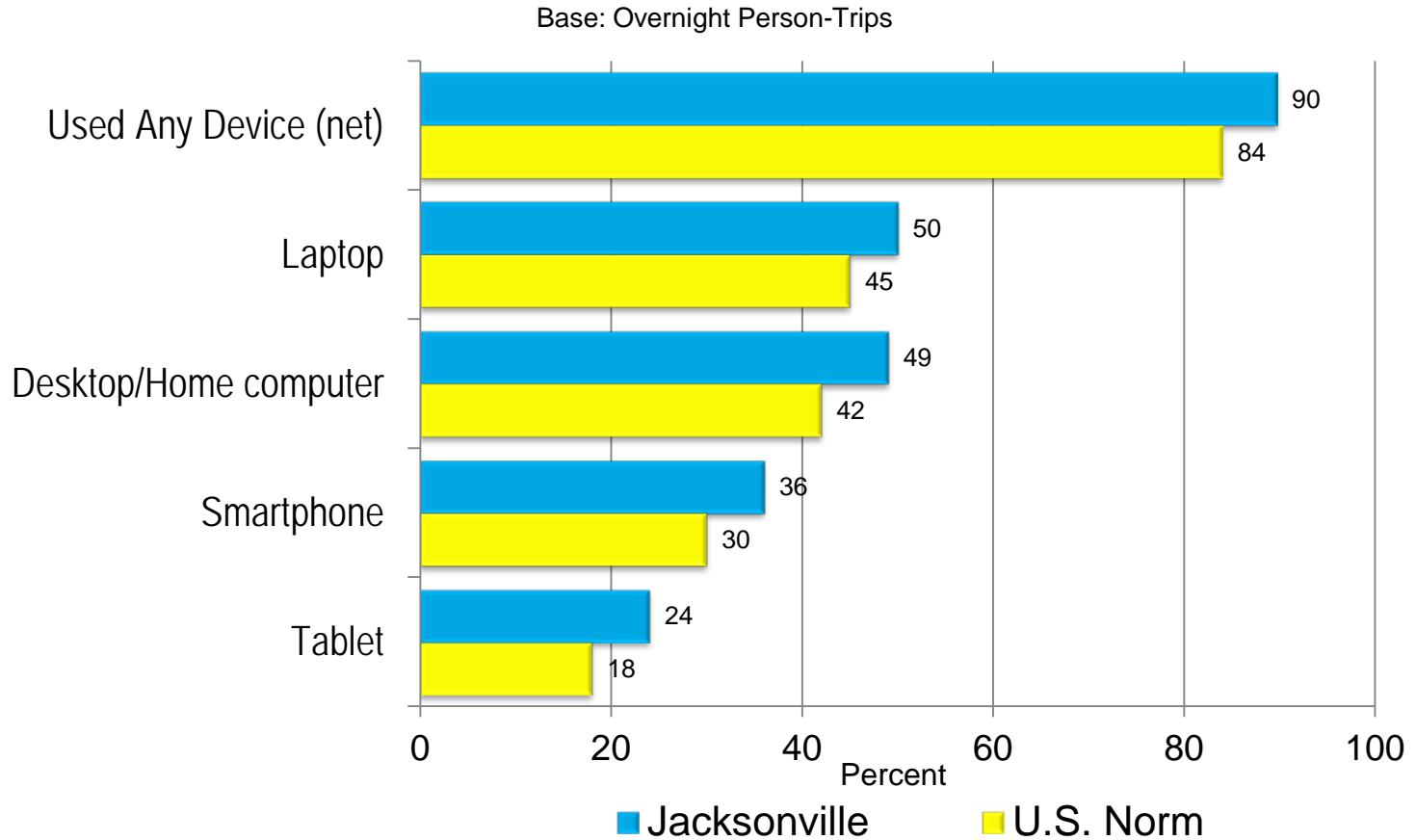


# Method of Booking



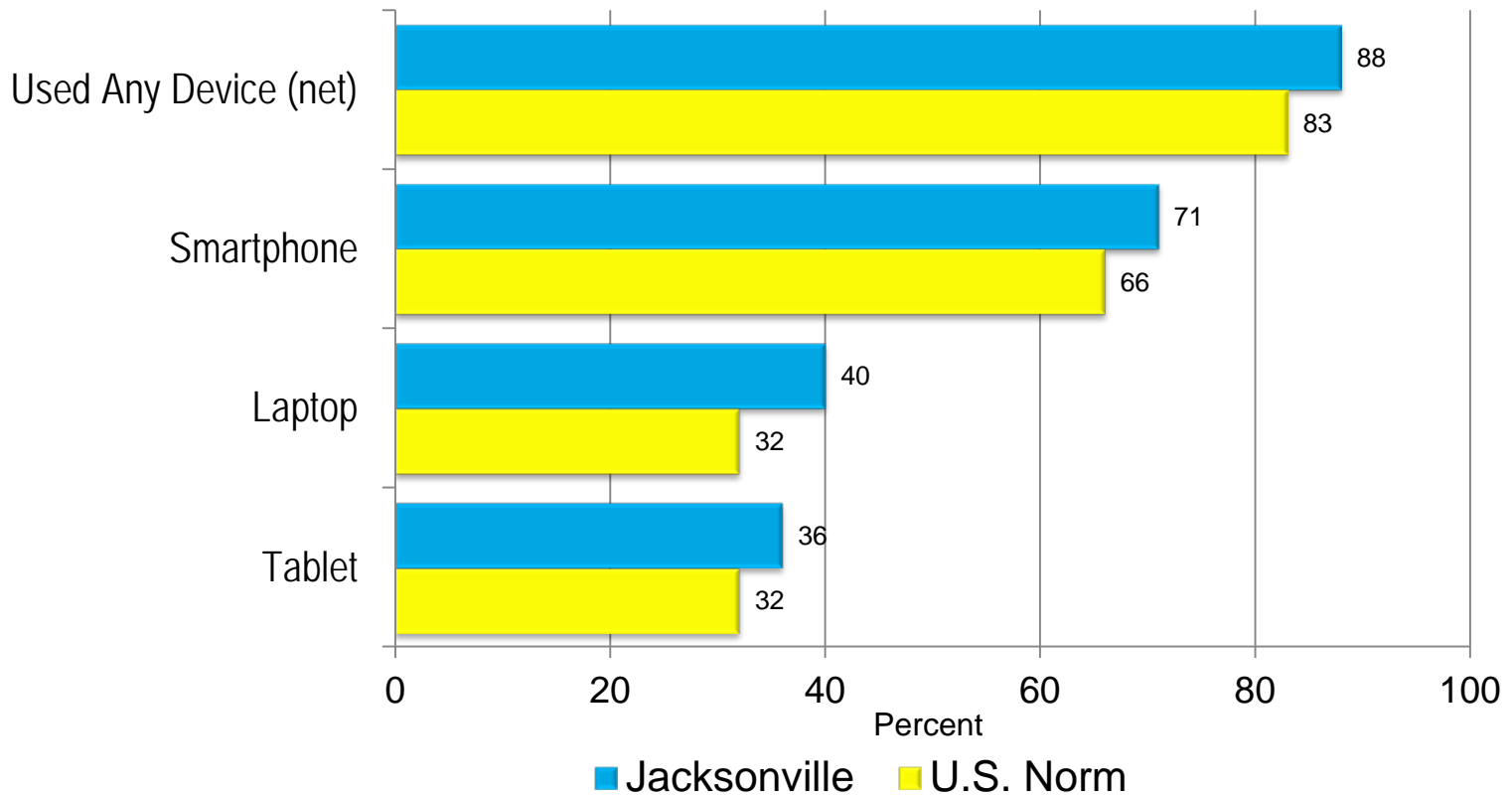


# Devices Used for Trip Planning

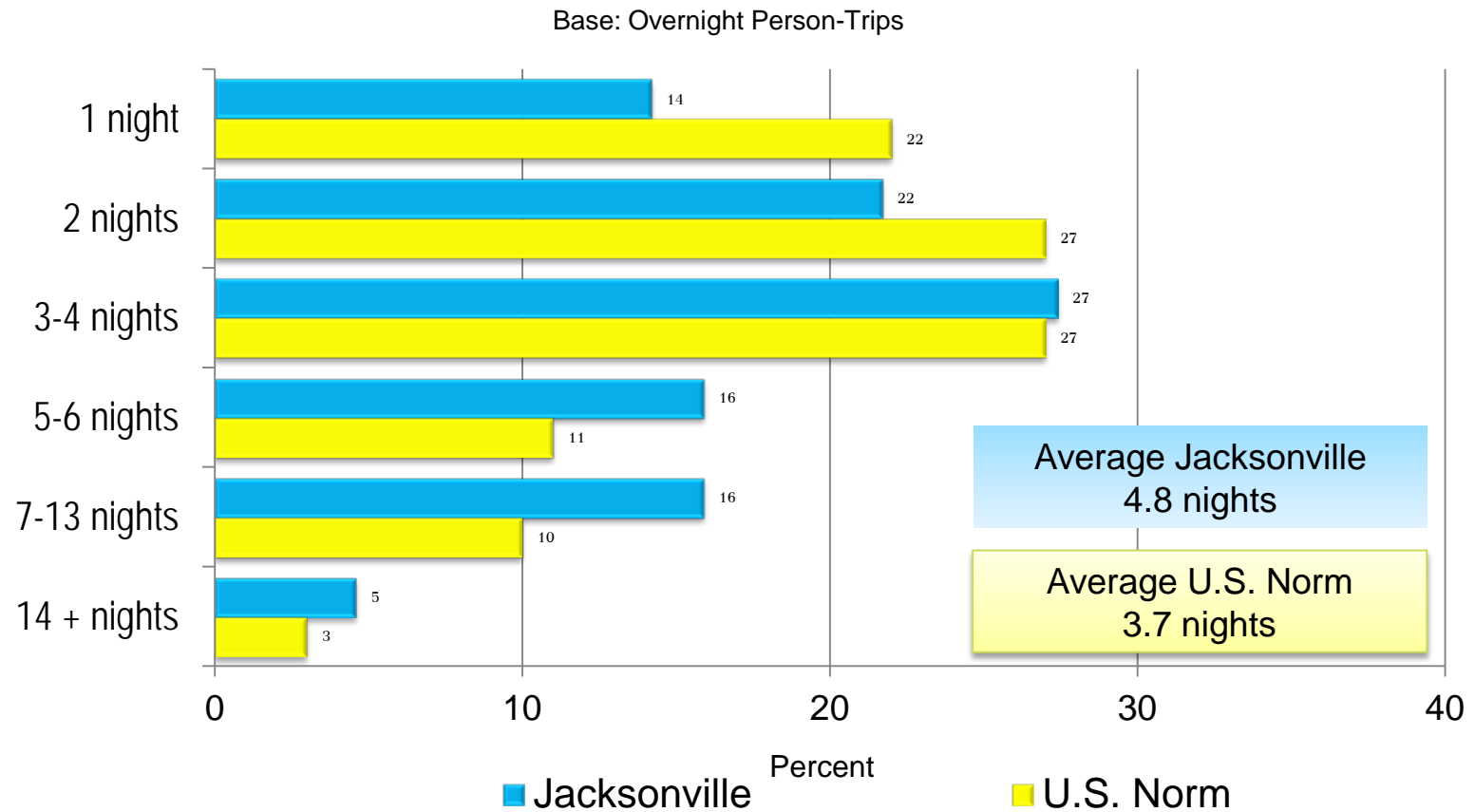


# Devices Used During Trip

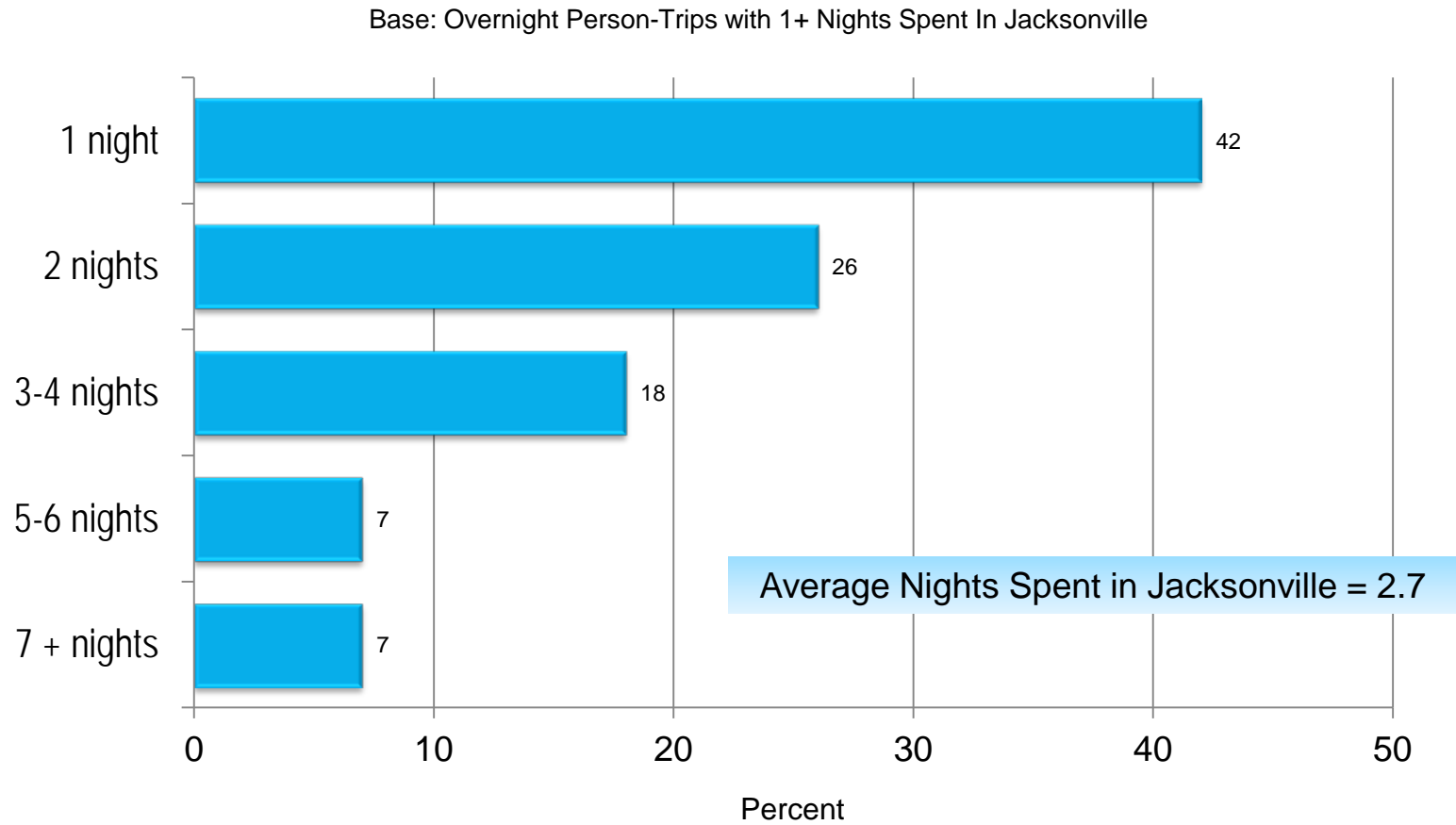
Base: Overnight Person-Trips



# Total Nights Away on Trip

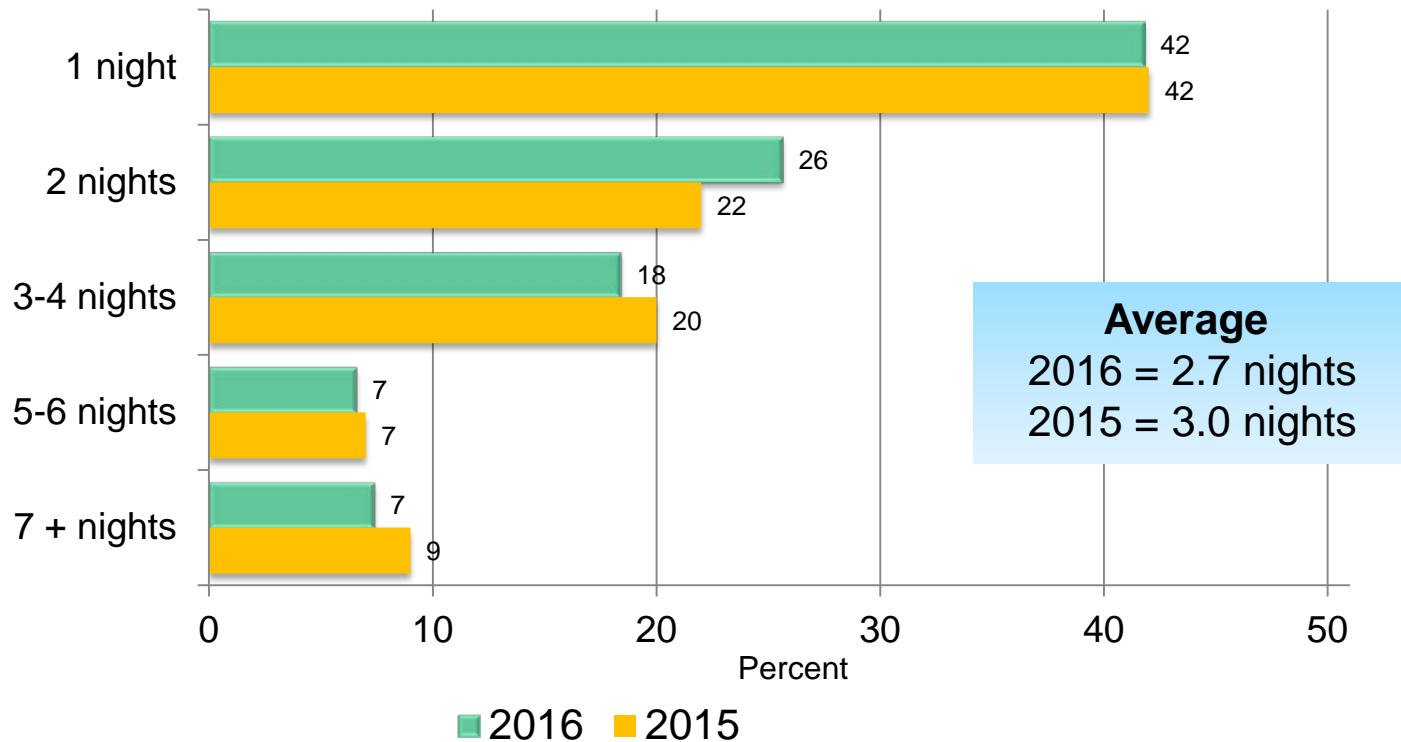


# Number of Nights Spent in Jacksonville

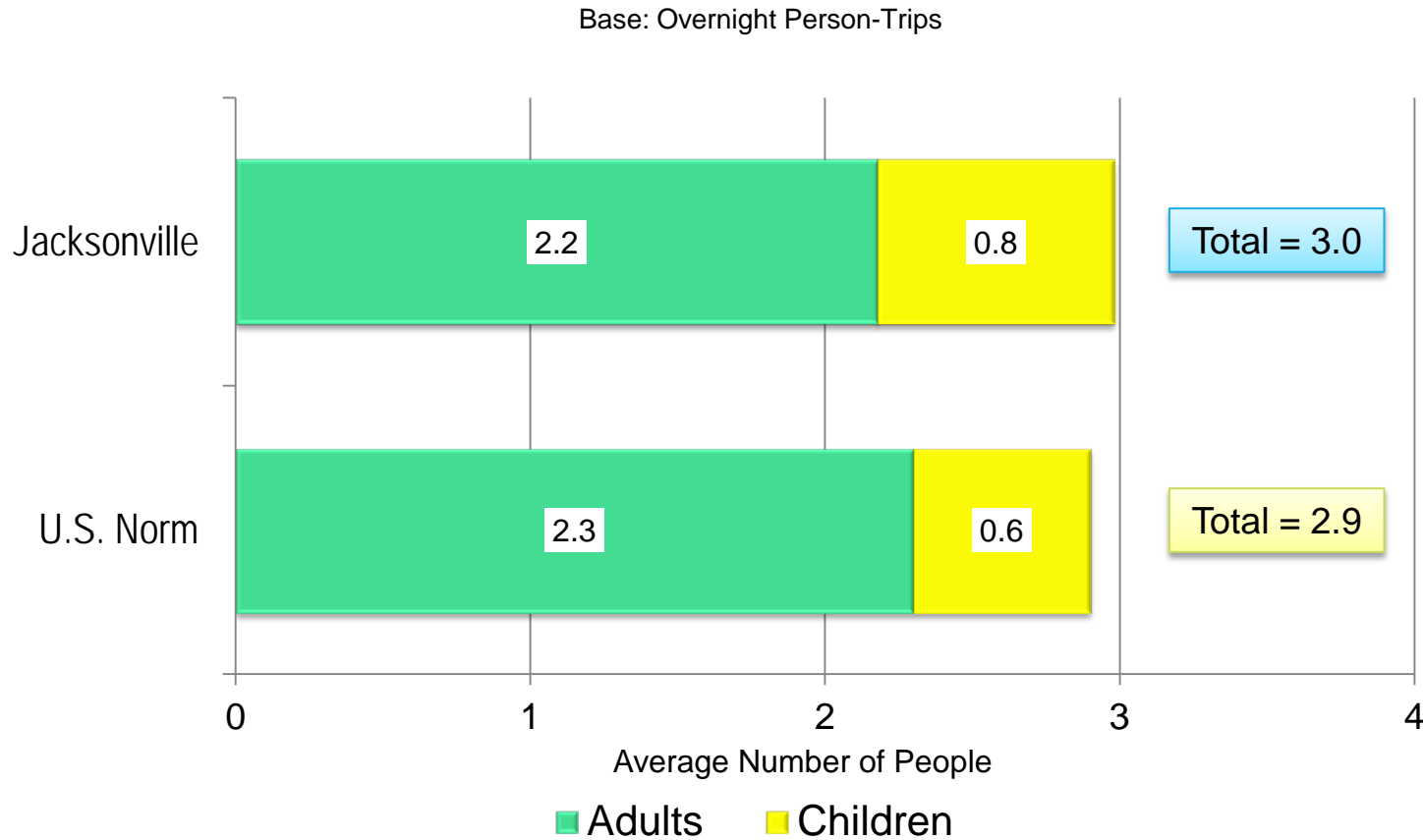


# Number of Nights Spent in Jacksonville – 2017 vs. 2016

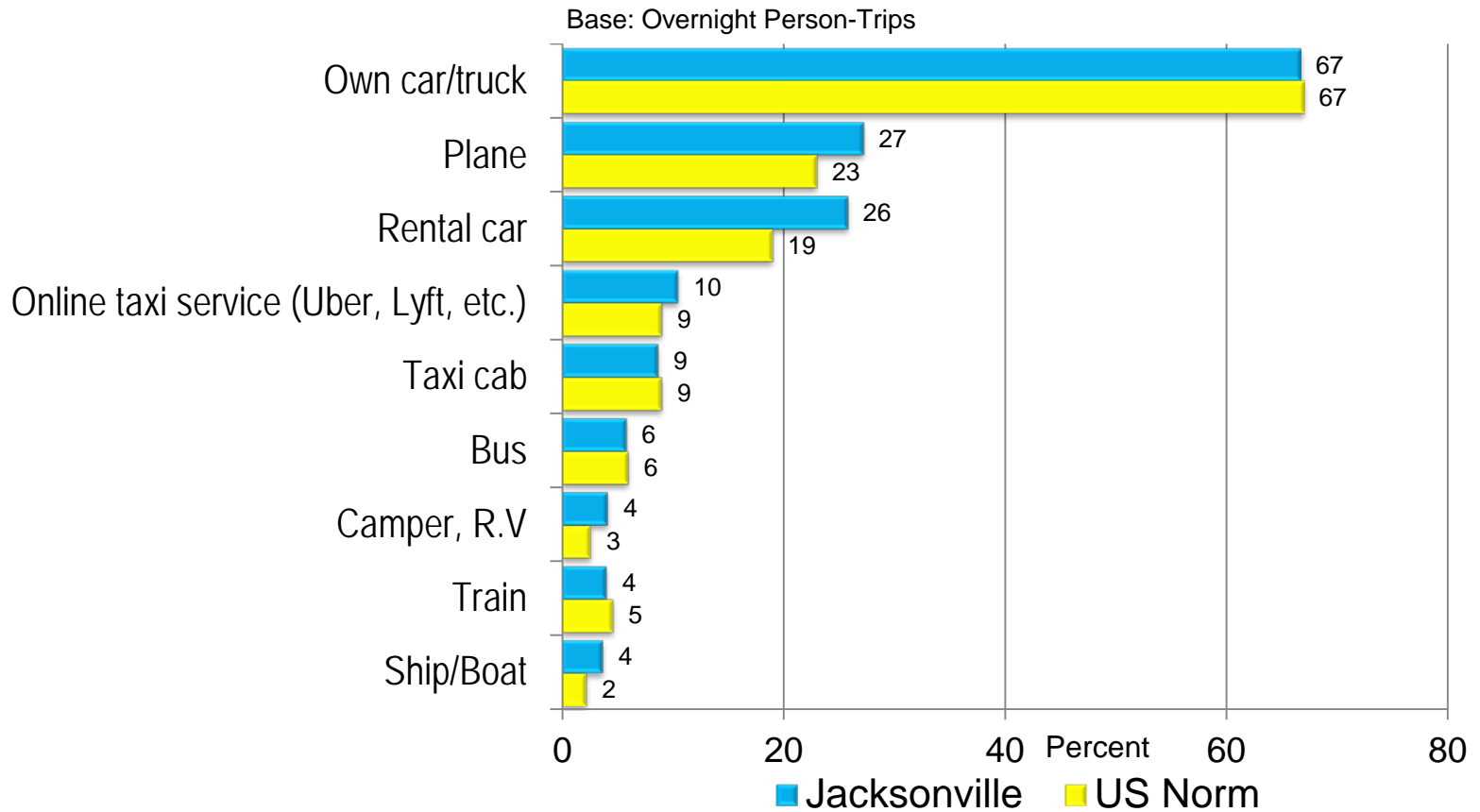
Base: Overnight Person-Trips with 1+ Nights Spent In Jacksonville



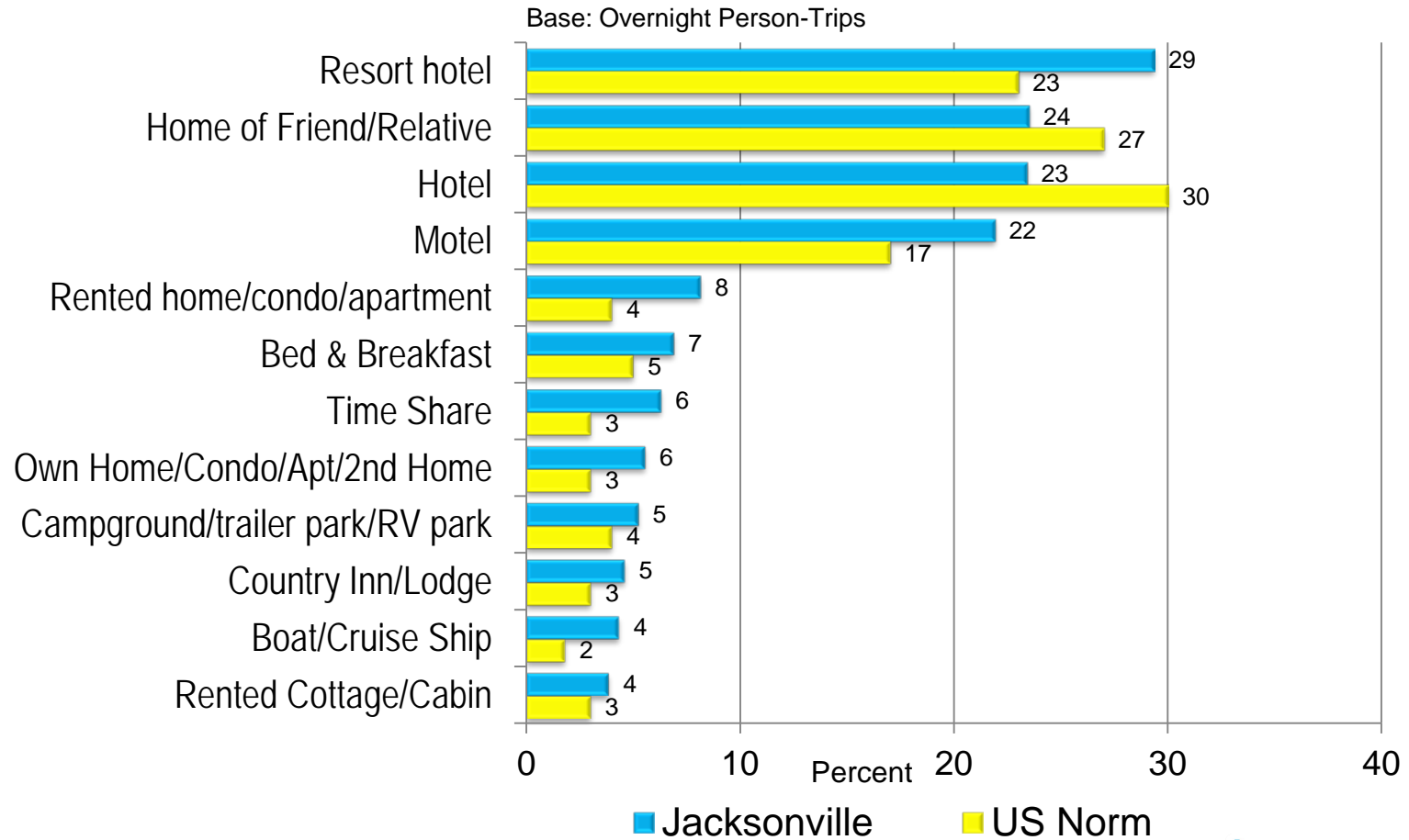
# Size of Travel Party



# Transportation



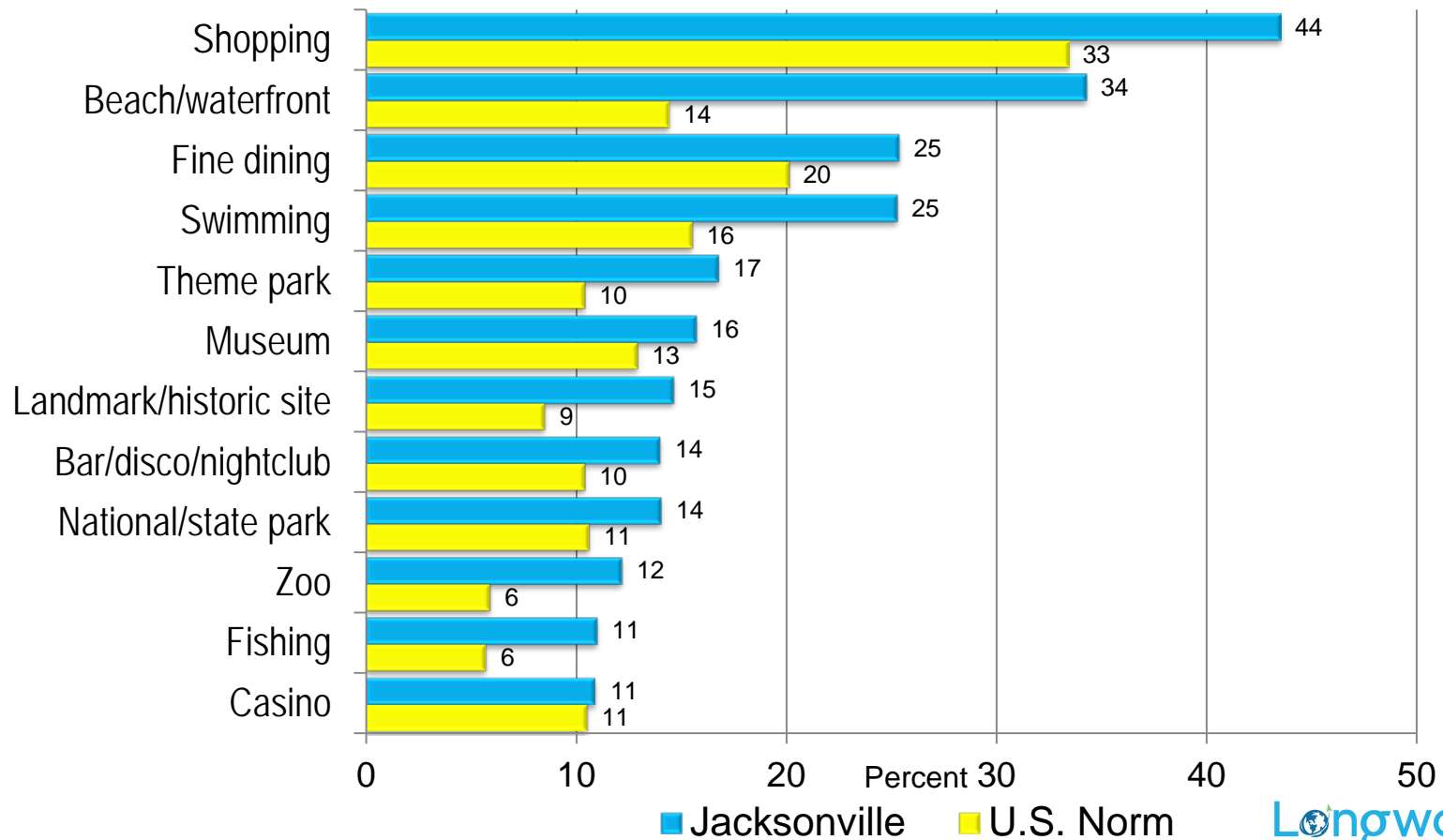
# Accommodations





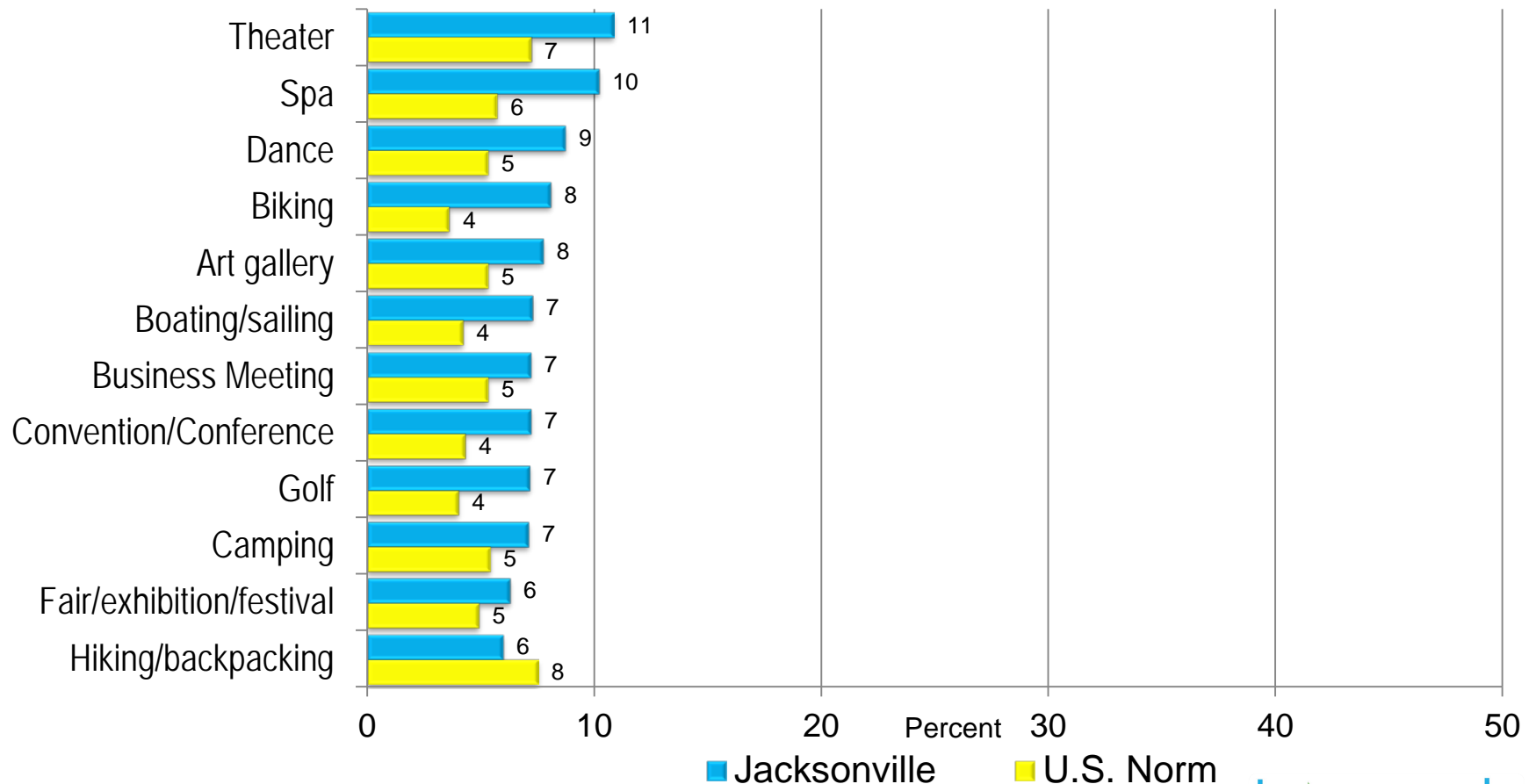
# Activities and Experiences

Base: Overnight Person-Trips



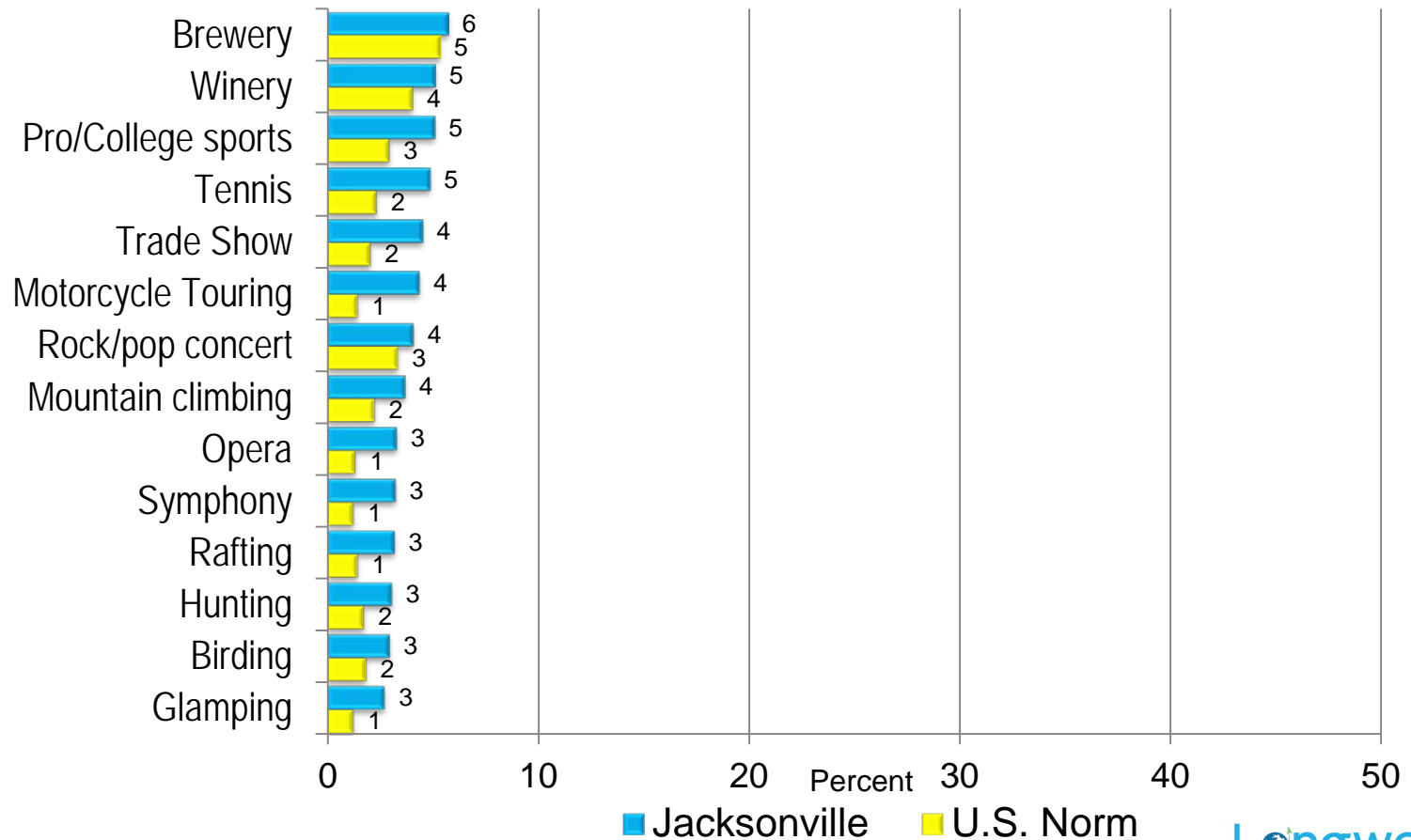
# Activities and Experiences – (Cont'd)

Base: Overnight Person-Trips



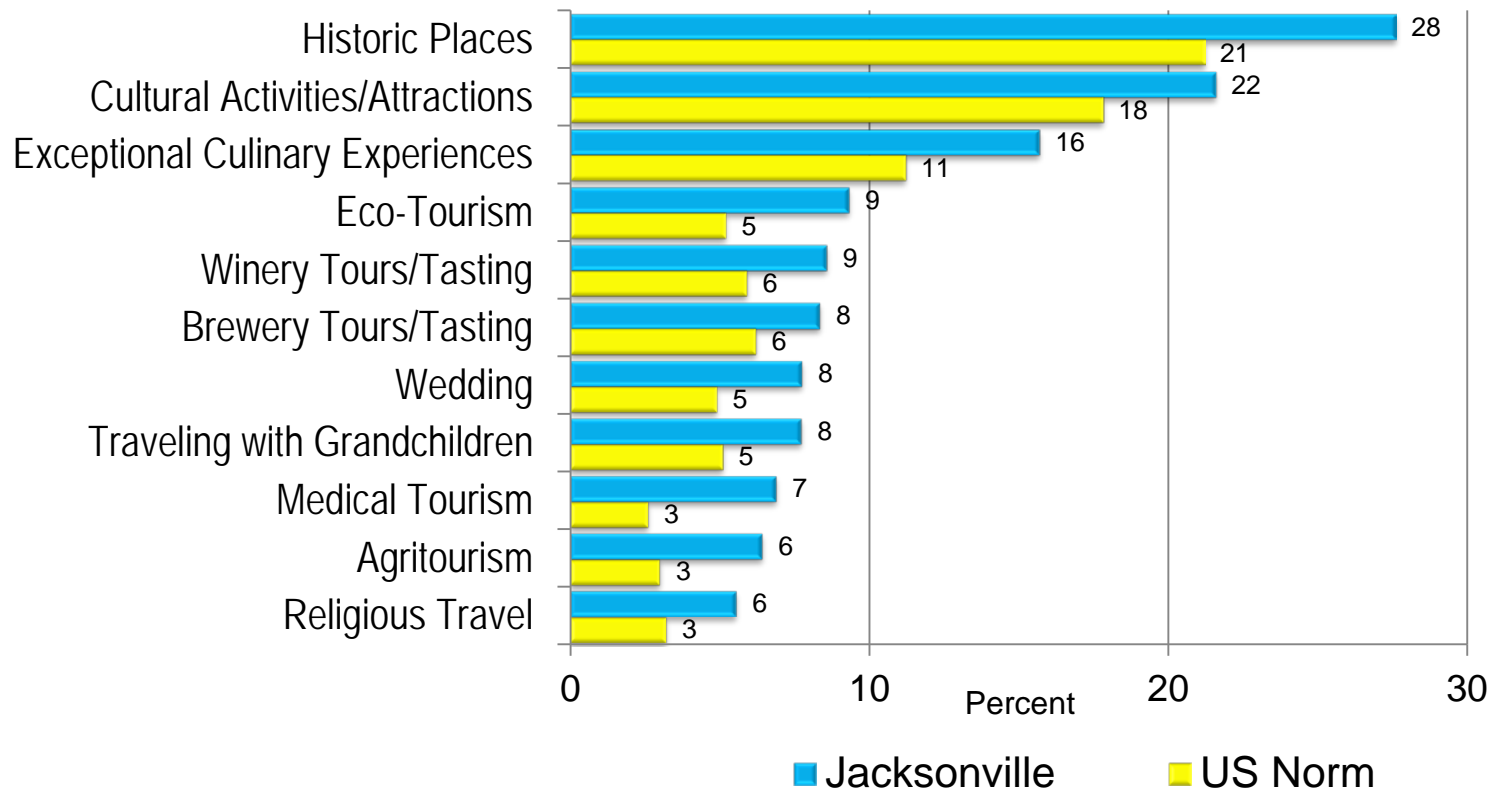
# Activities and Experiences – (Cont'd)

Base: Overnight Person-Trips



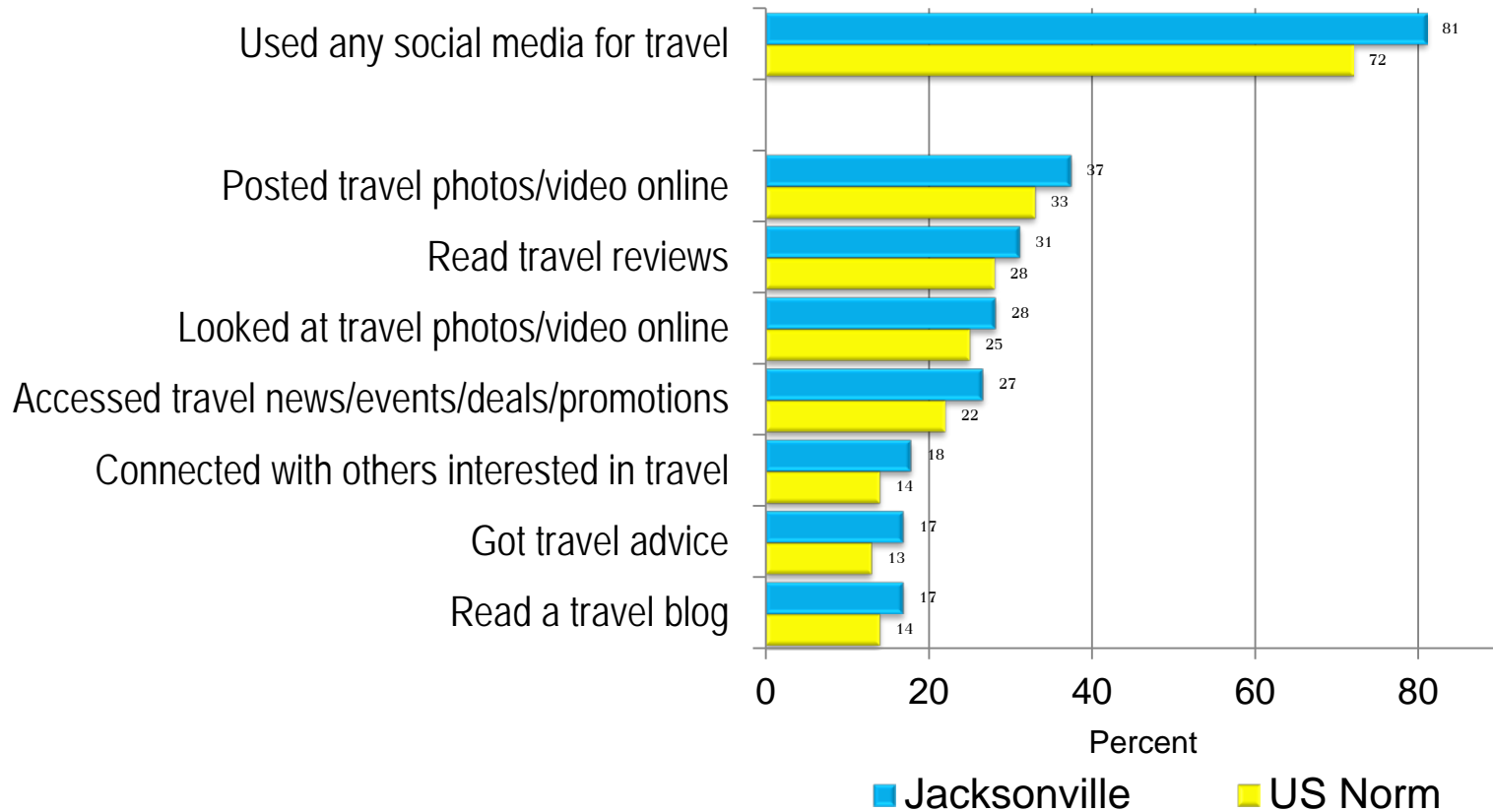
# Activities of Special Interest

Base: Overnight Person-Trips



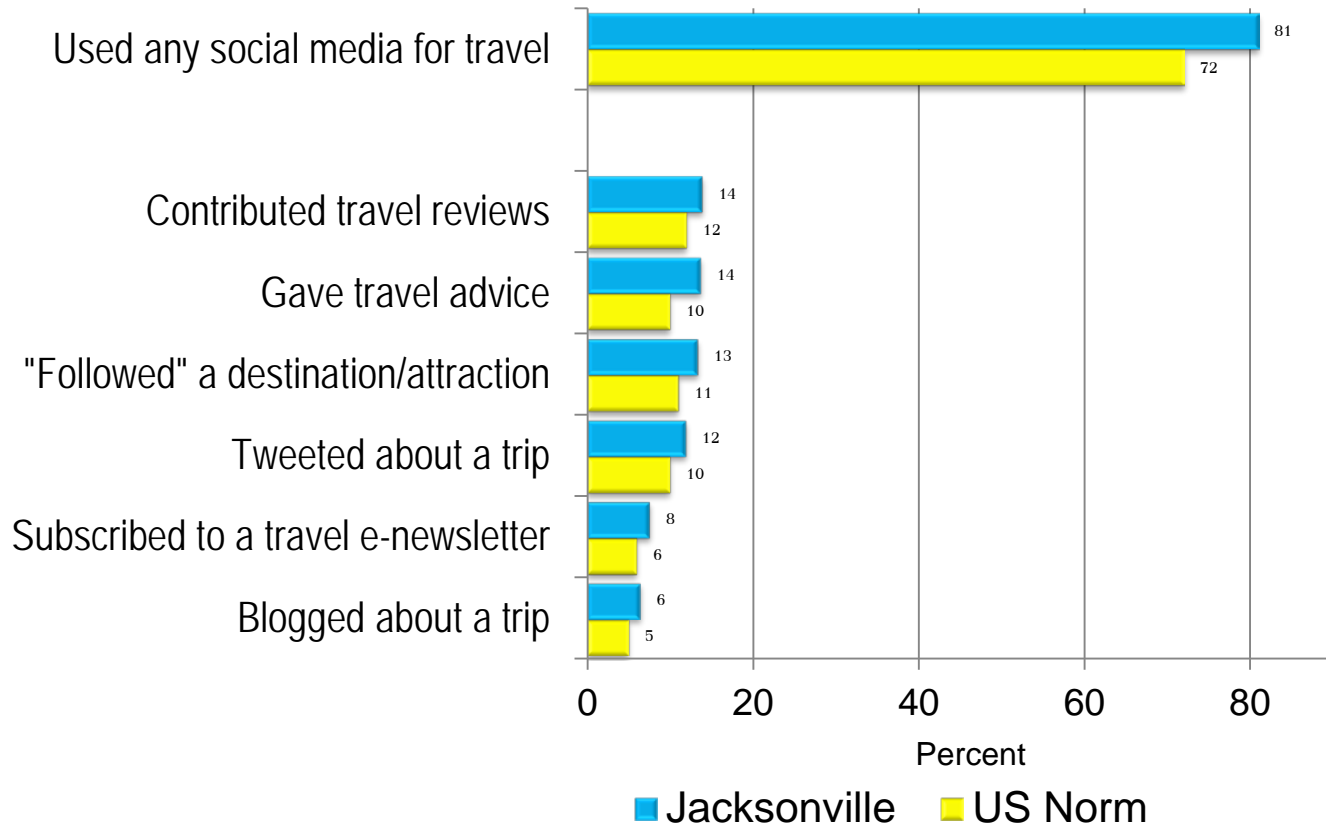
# Online Social Media Use by Travelers

Base: Overnight Person-Trips



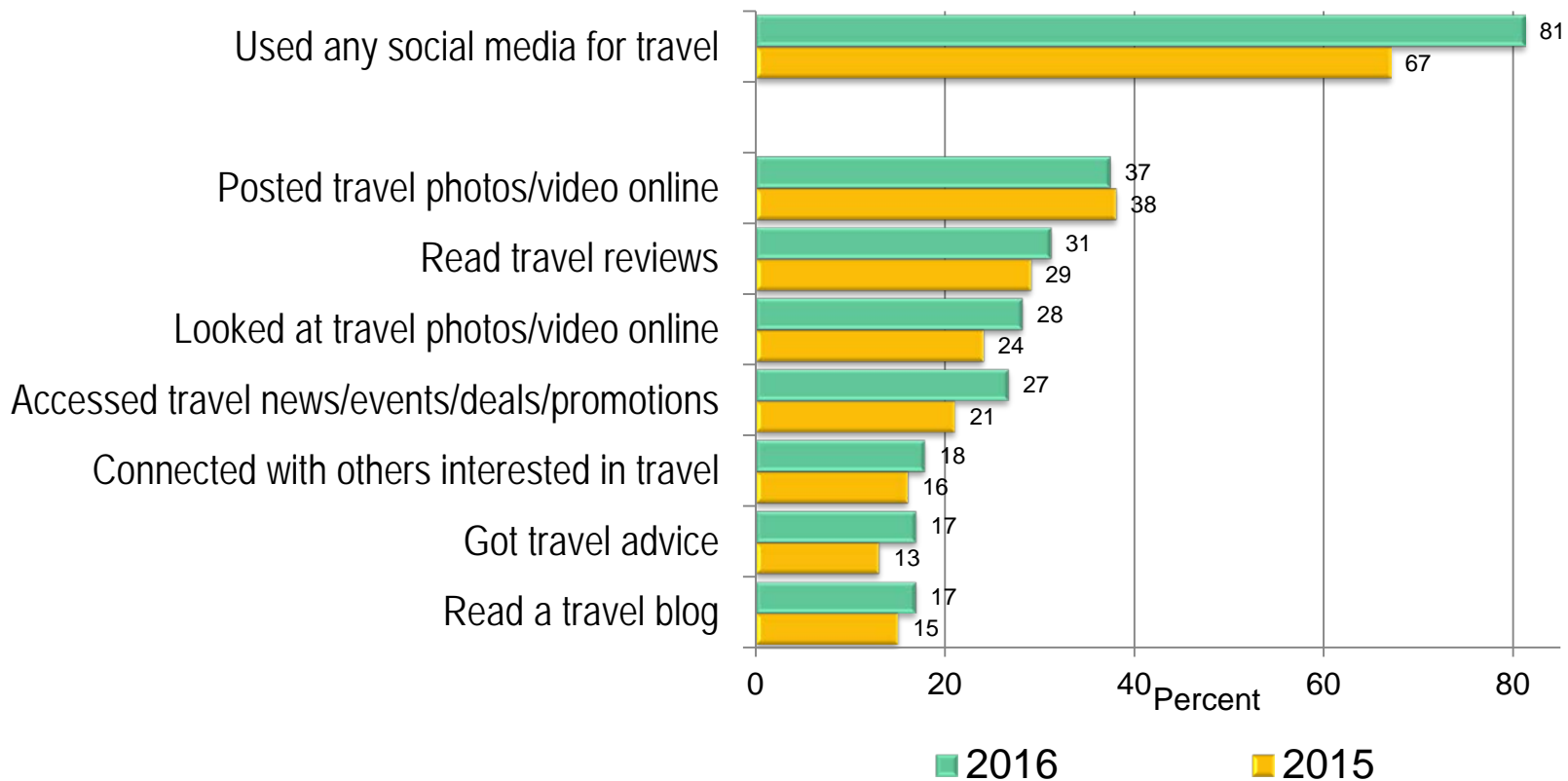
# Online Social Media Use by Travelers

Base: Overnight Person-Trips



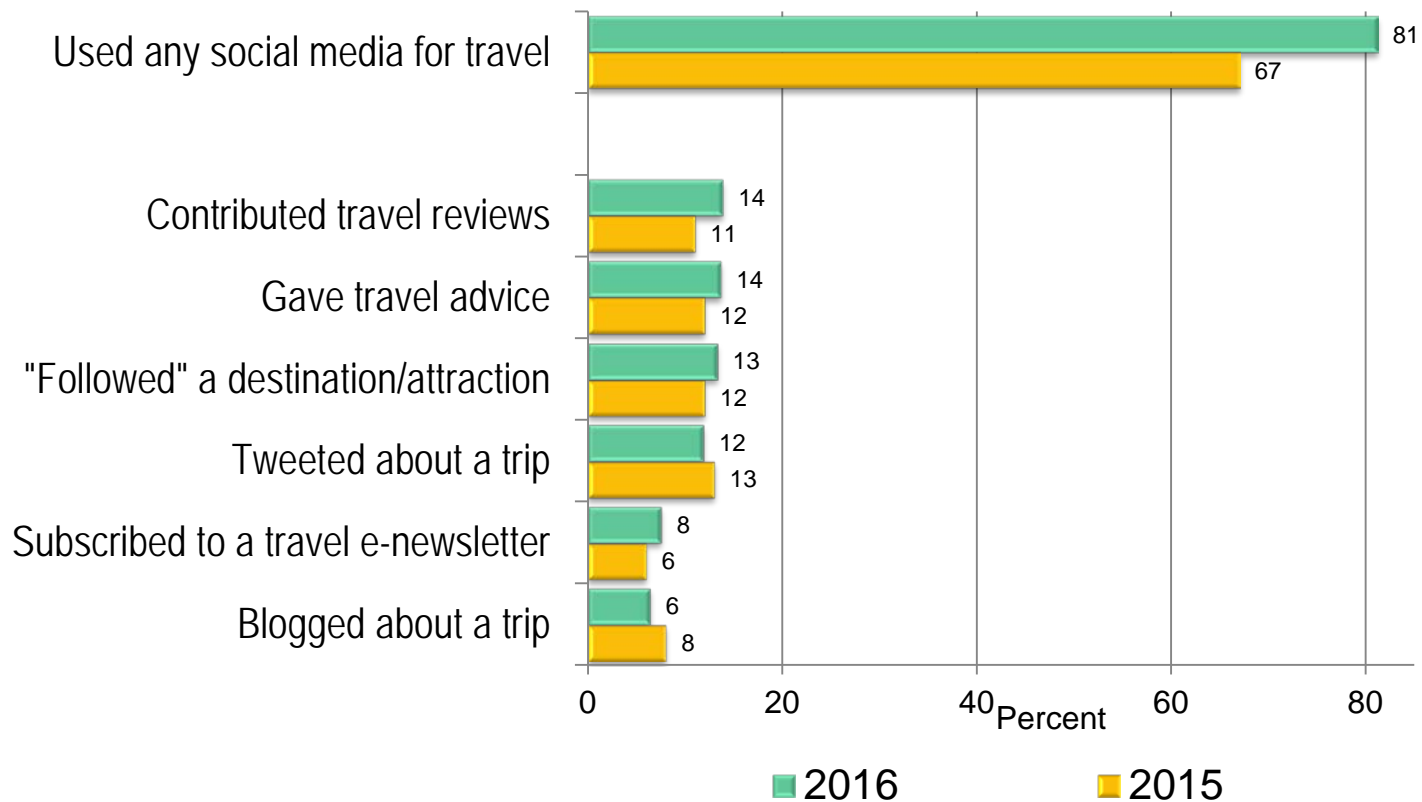
# Online Social Media Use by Travelers 2016 vs. 2015

Base: Overnight Person-Trips to Jacksonville



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

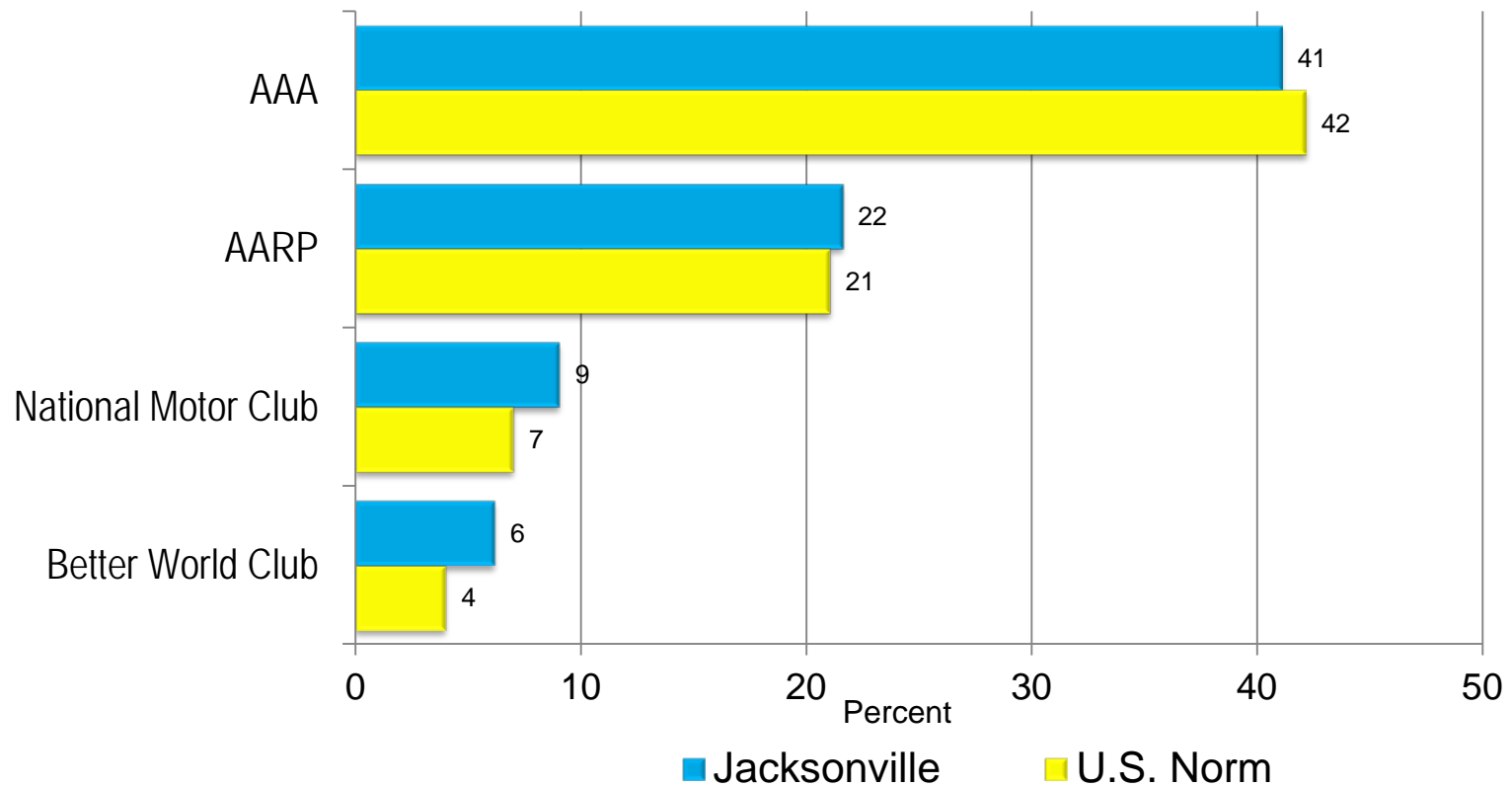
Base: Overnight Person-Trips to Jacksonville





# Organization Membership

Base: Overnight Person-Trips



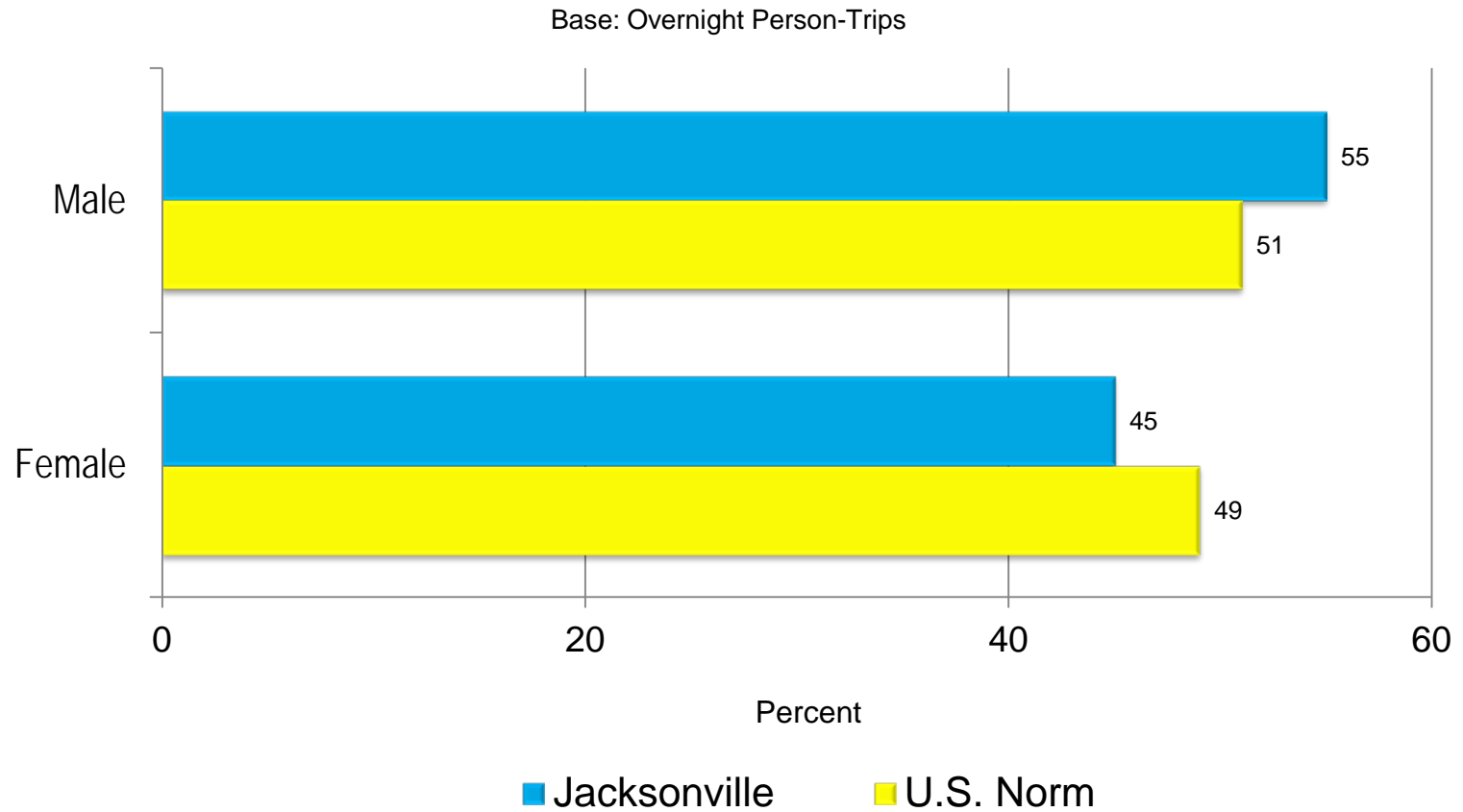


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# Demographic Profile of Overnight Visitors

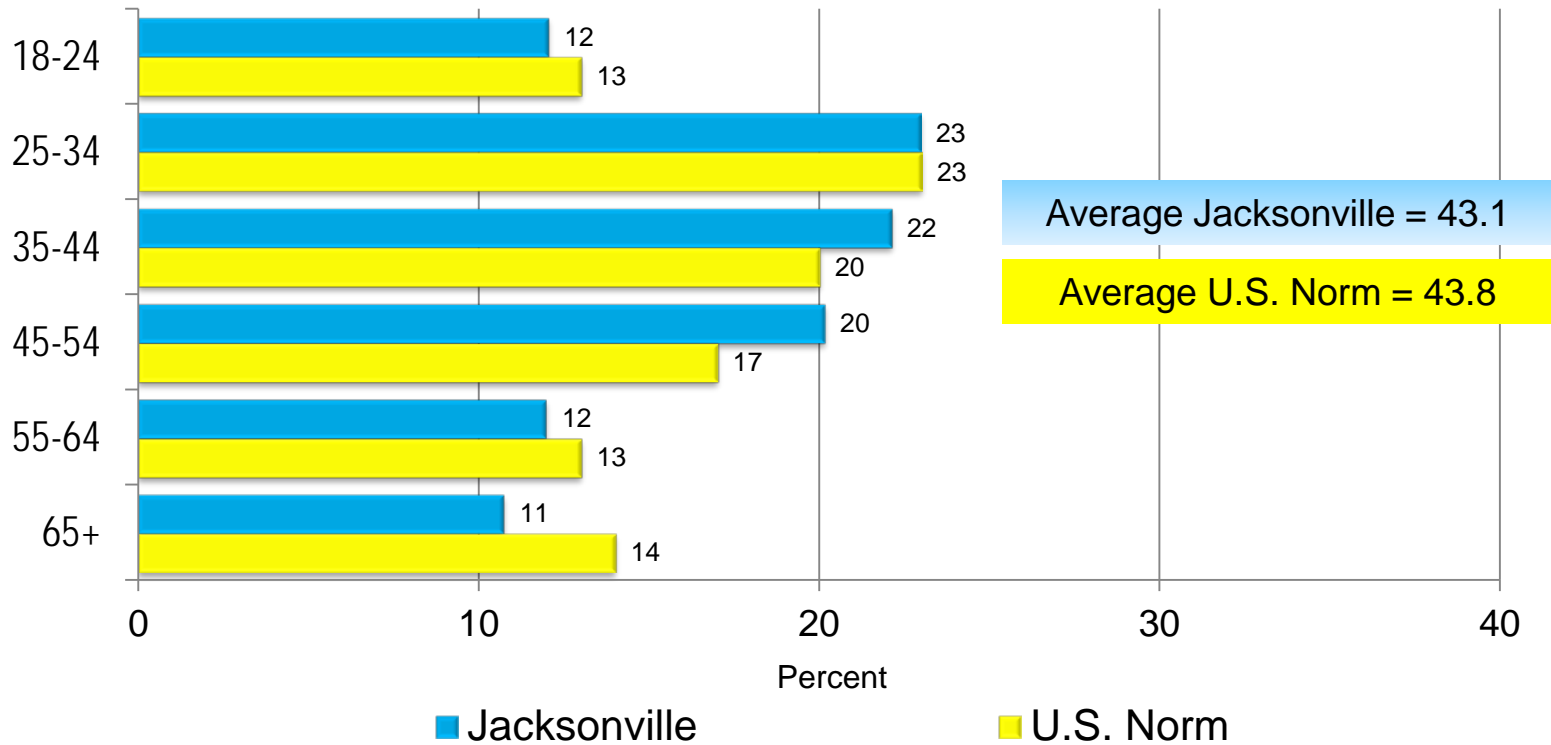


# Gender

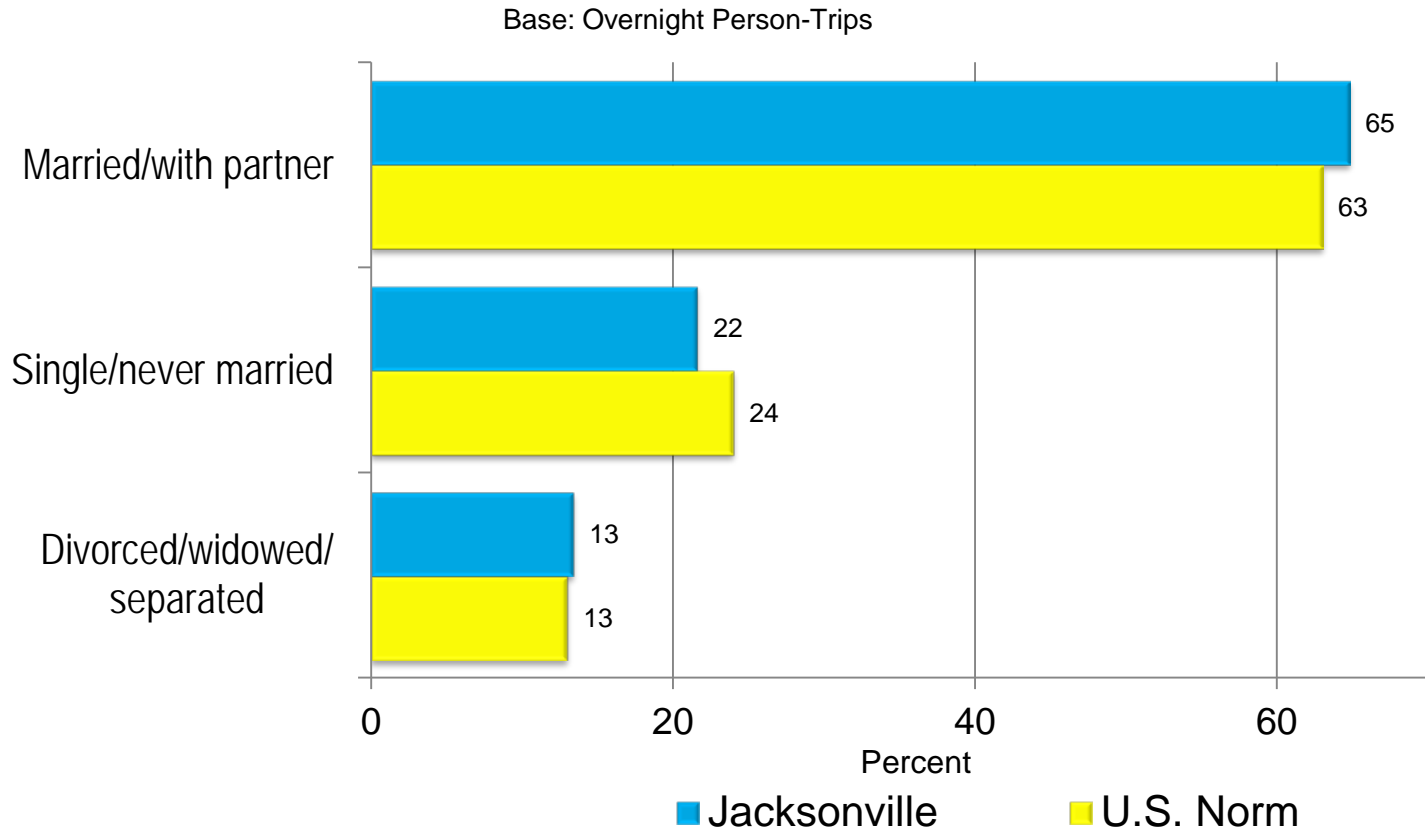


# Age

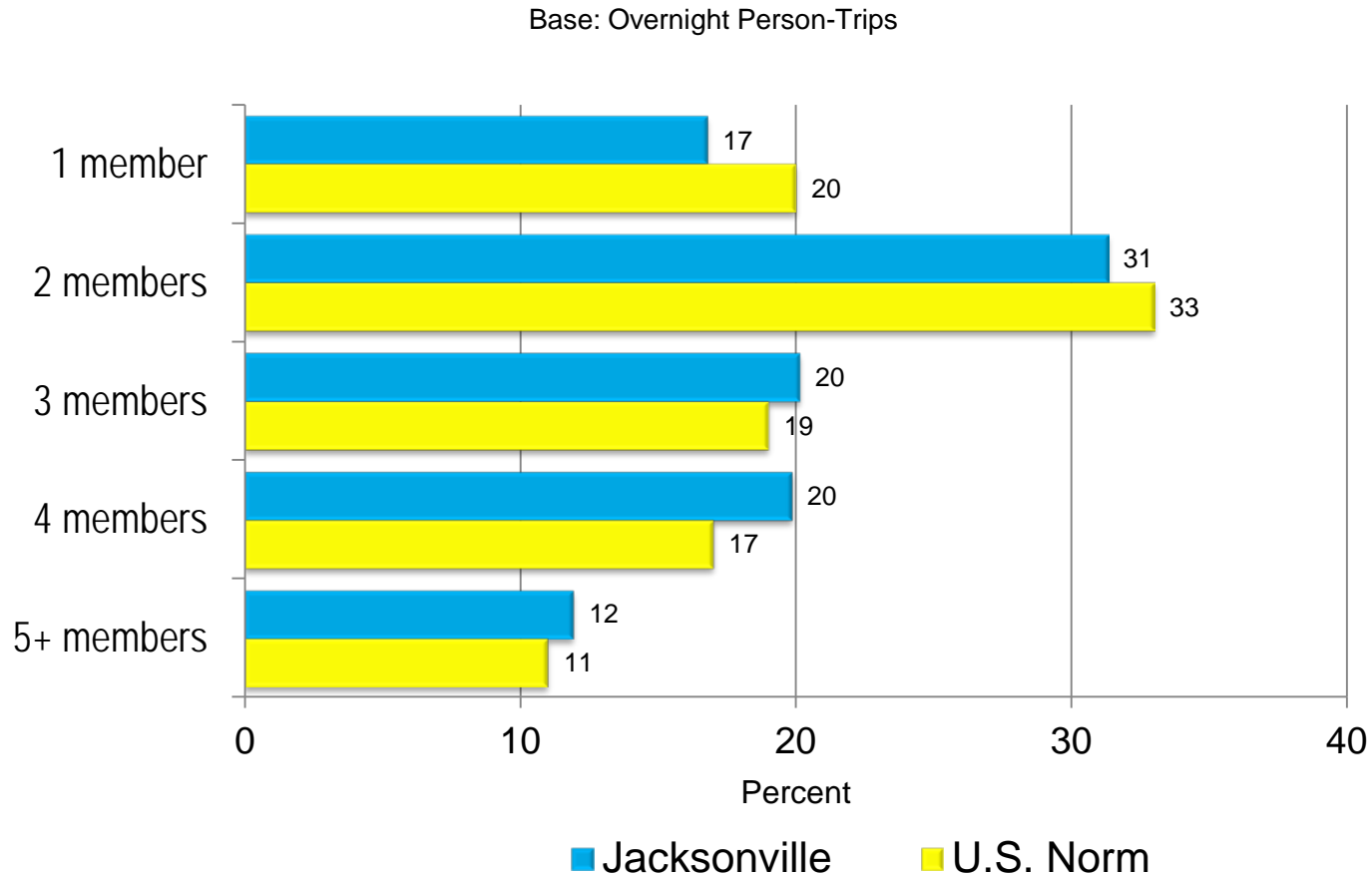
Base: Overnight Person-Trips



# Marital Status

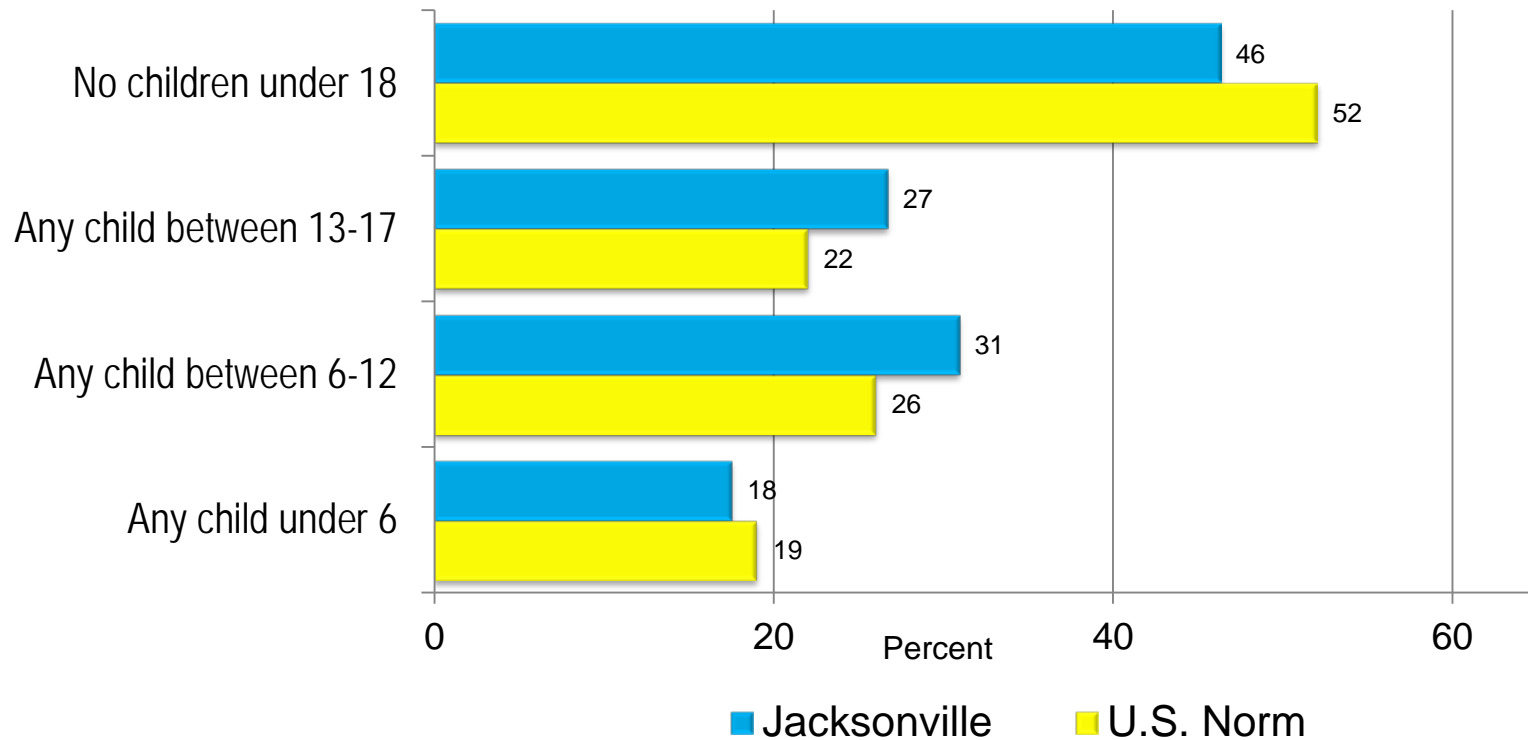


# Household Size



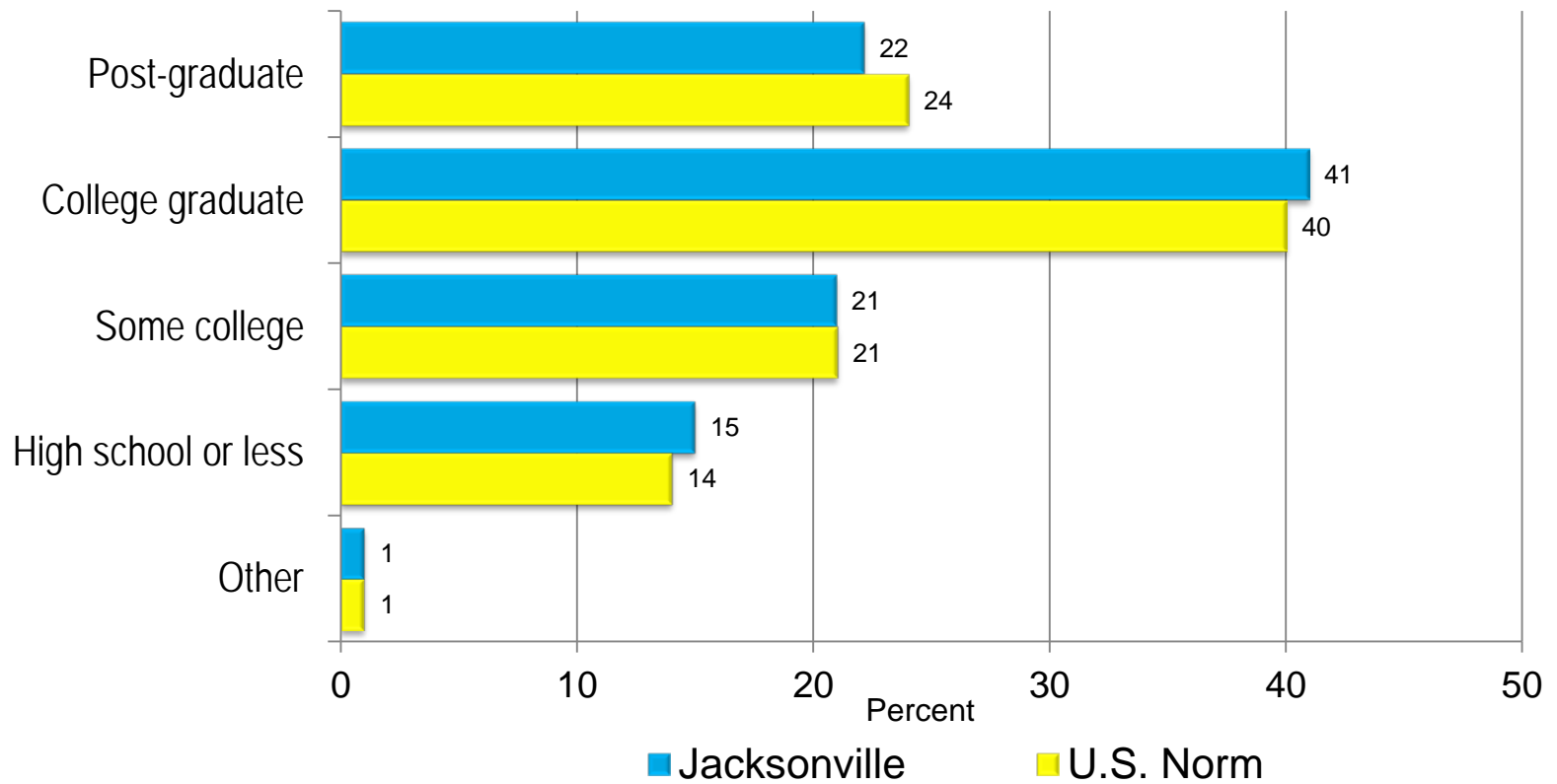
# Children in Household

Base: Overnight Person-Trips



# Education

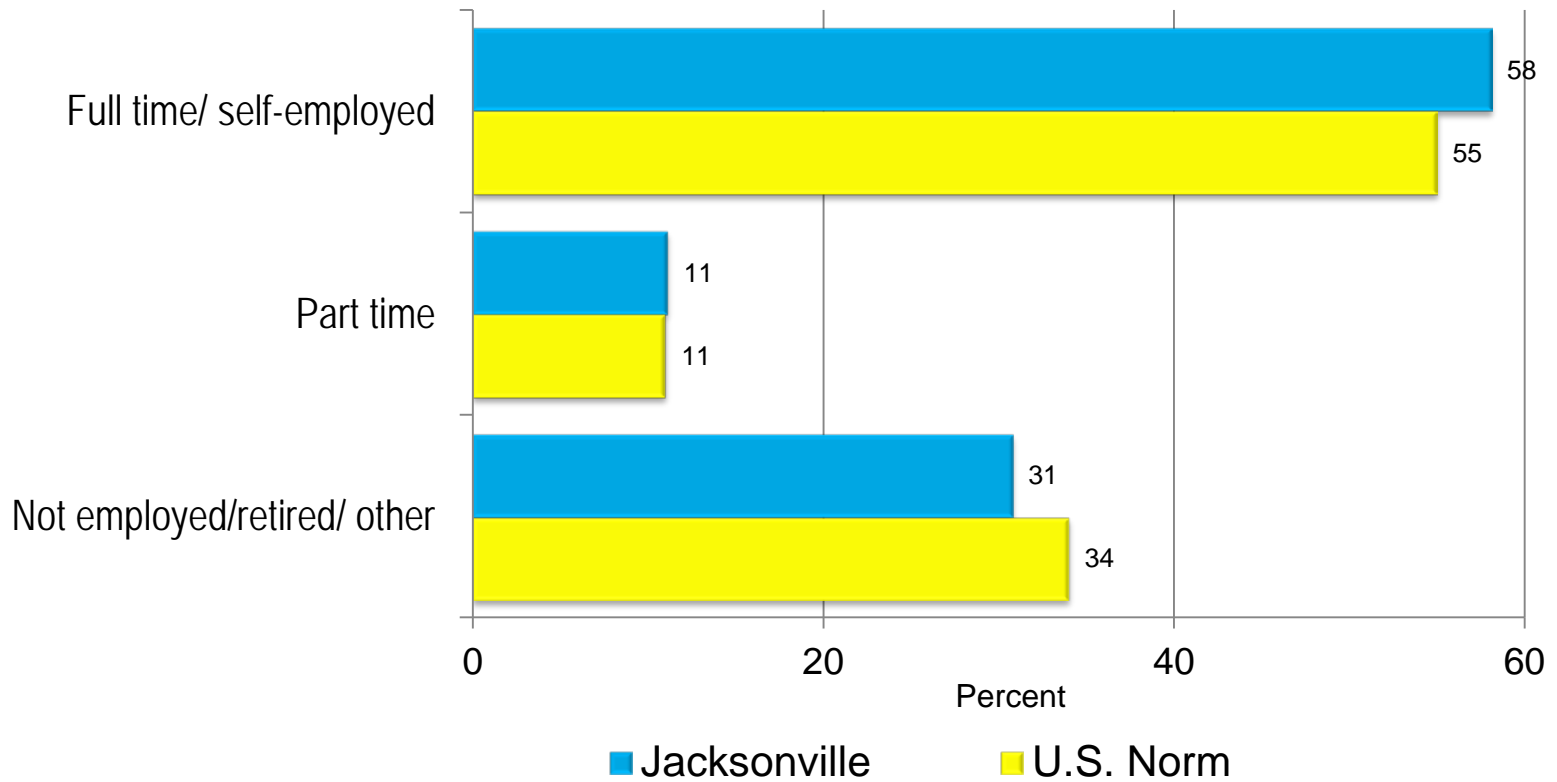
Base: Overnight Person-Trips





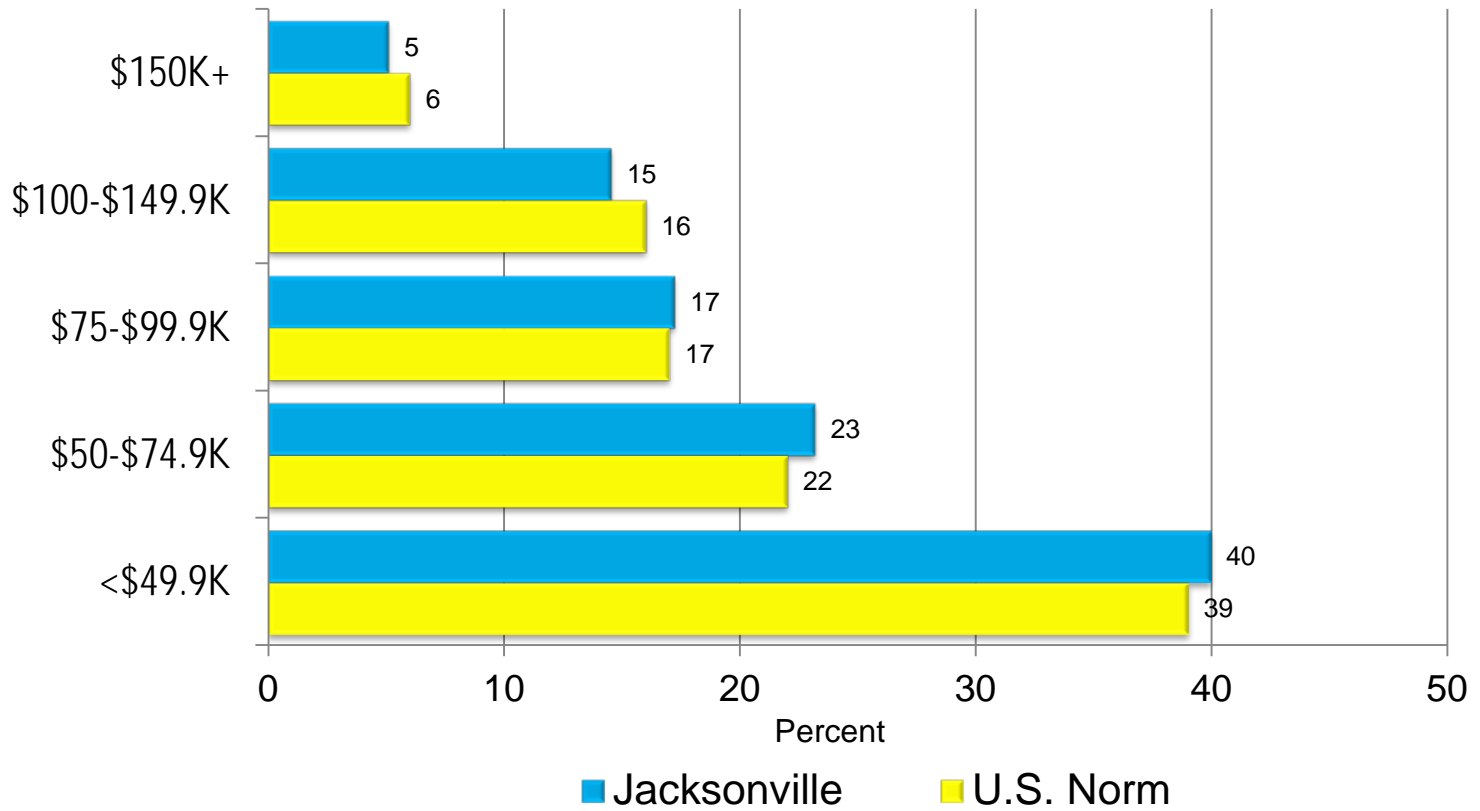
# Employment

Base: Overnight Person-Trips

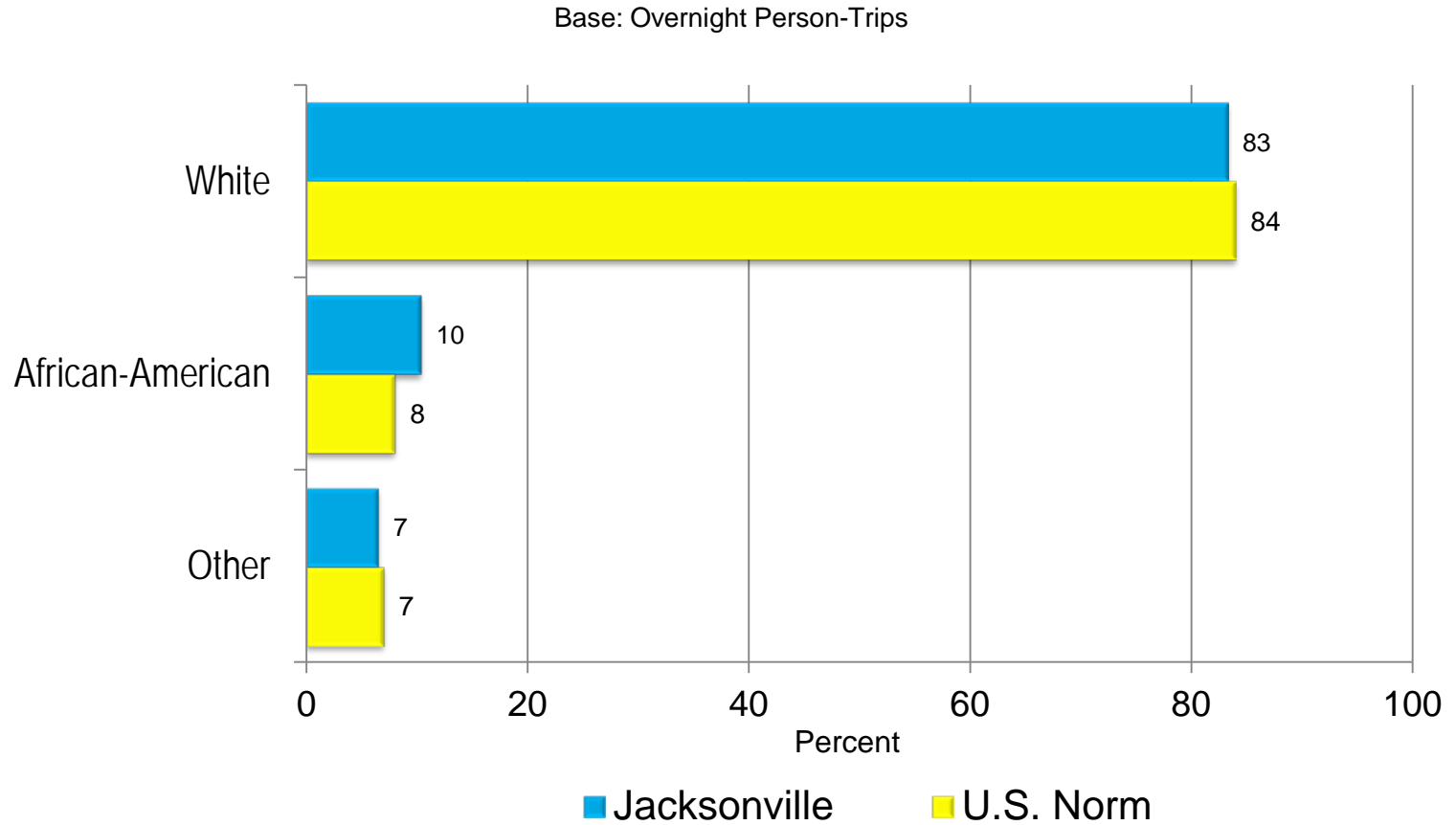


# Household Income

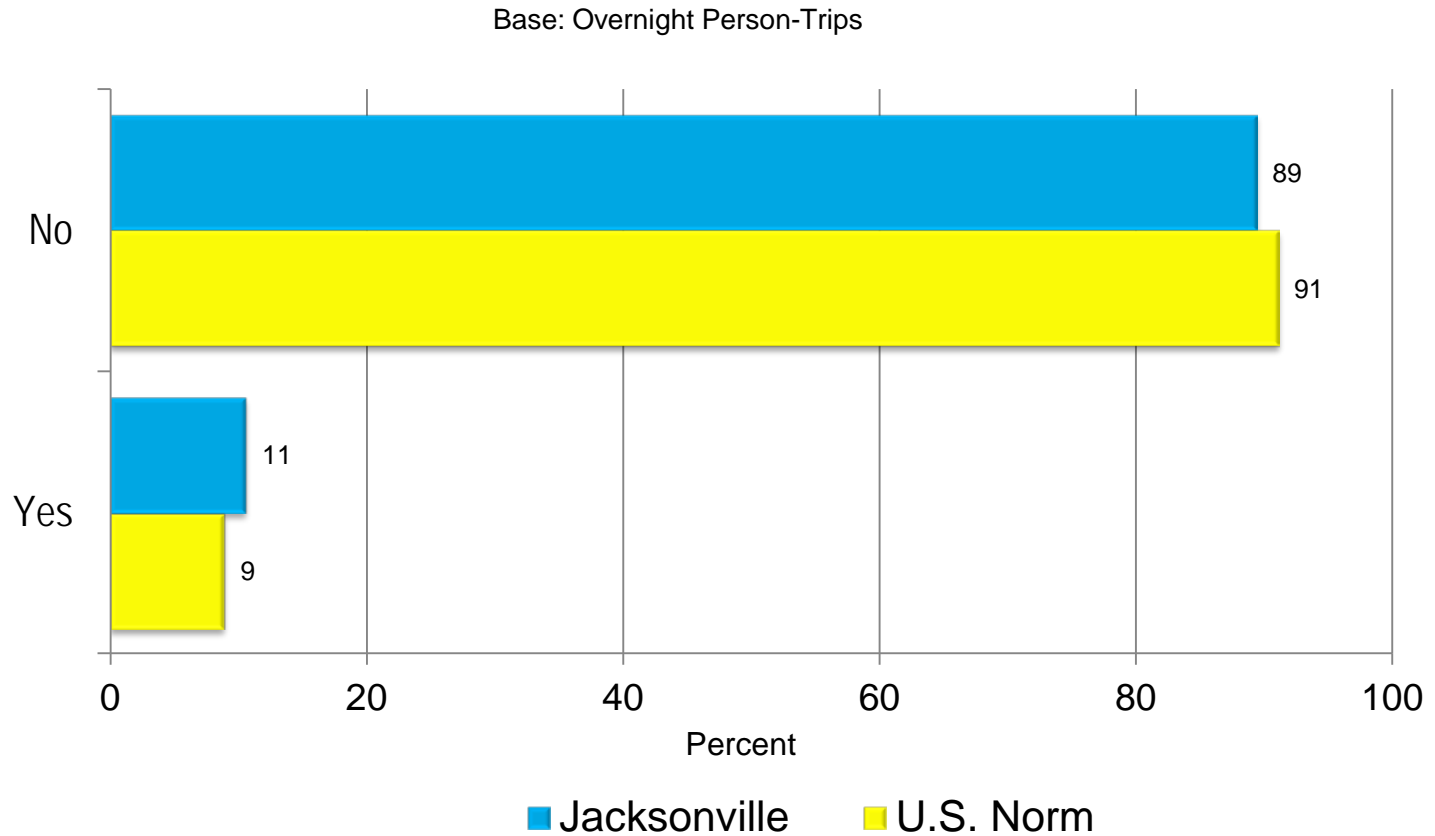
Base: Overnight Person-Trips



# Race



# Hispanic Background





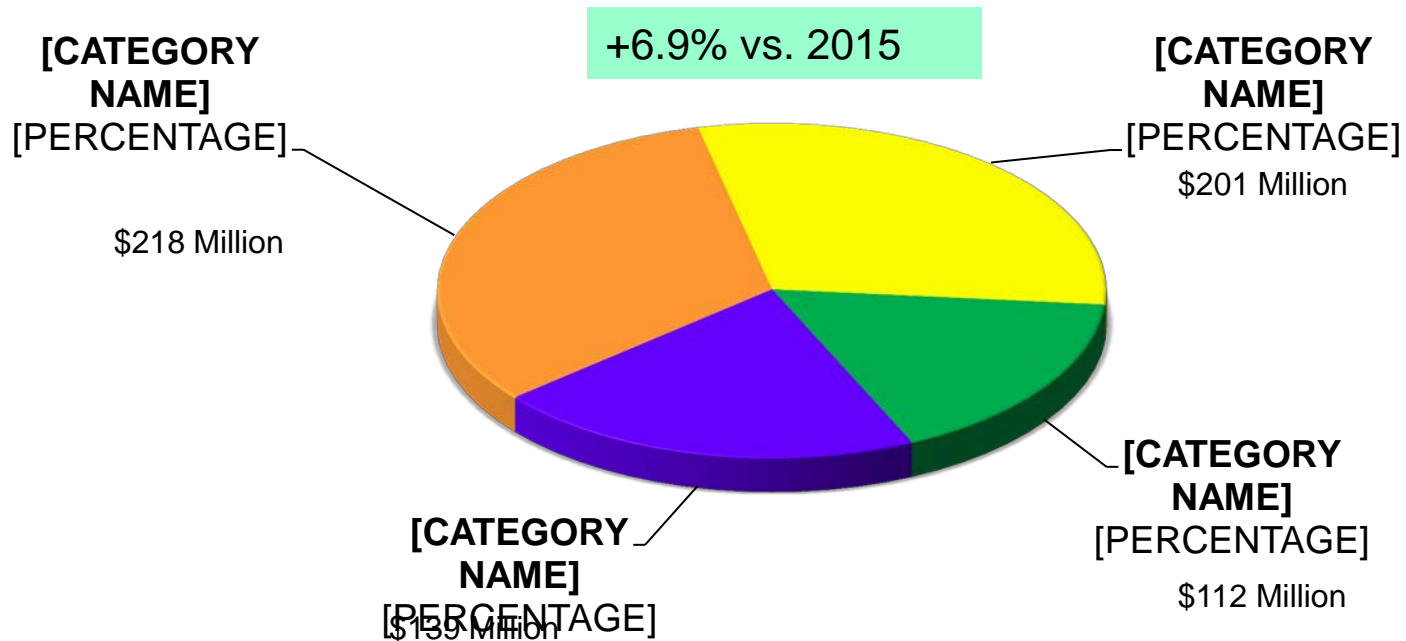
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# Day Trip Expenditures



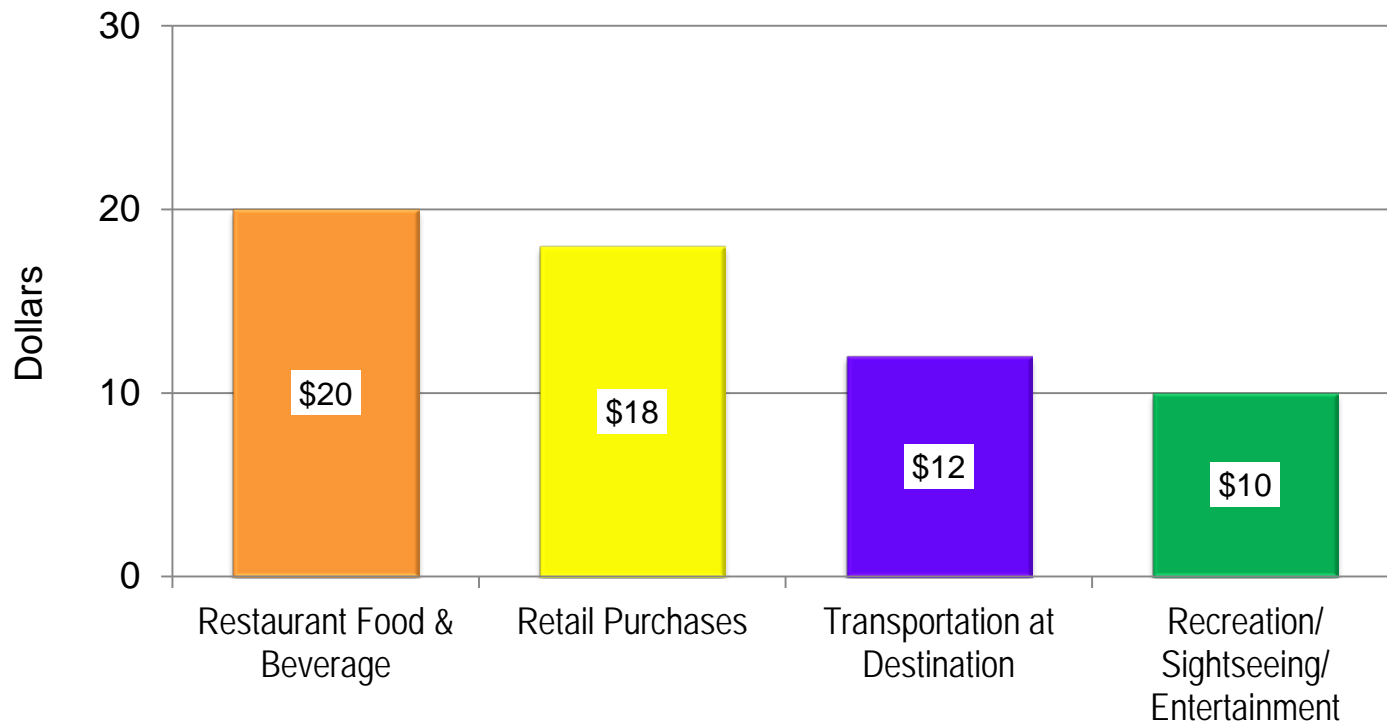
# Total 2016 Jacksonville Domestic Day Trip Spending — by Sector

Total Spending = \$670 Million

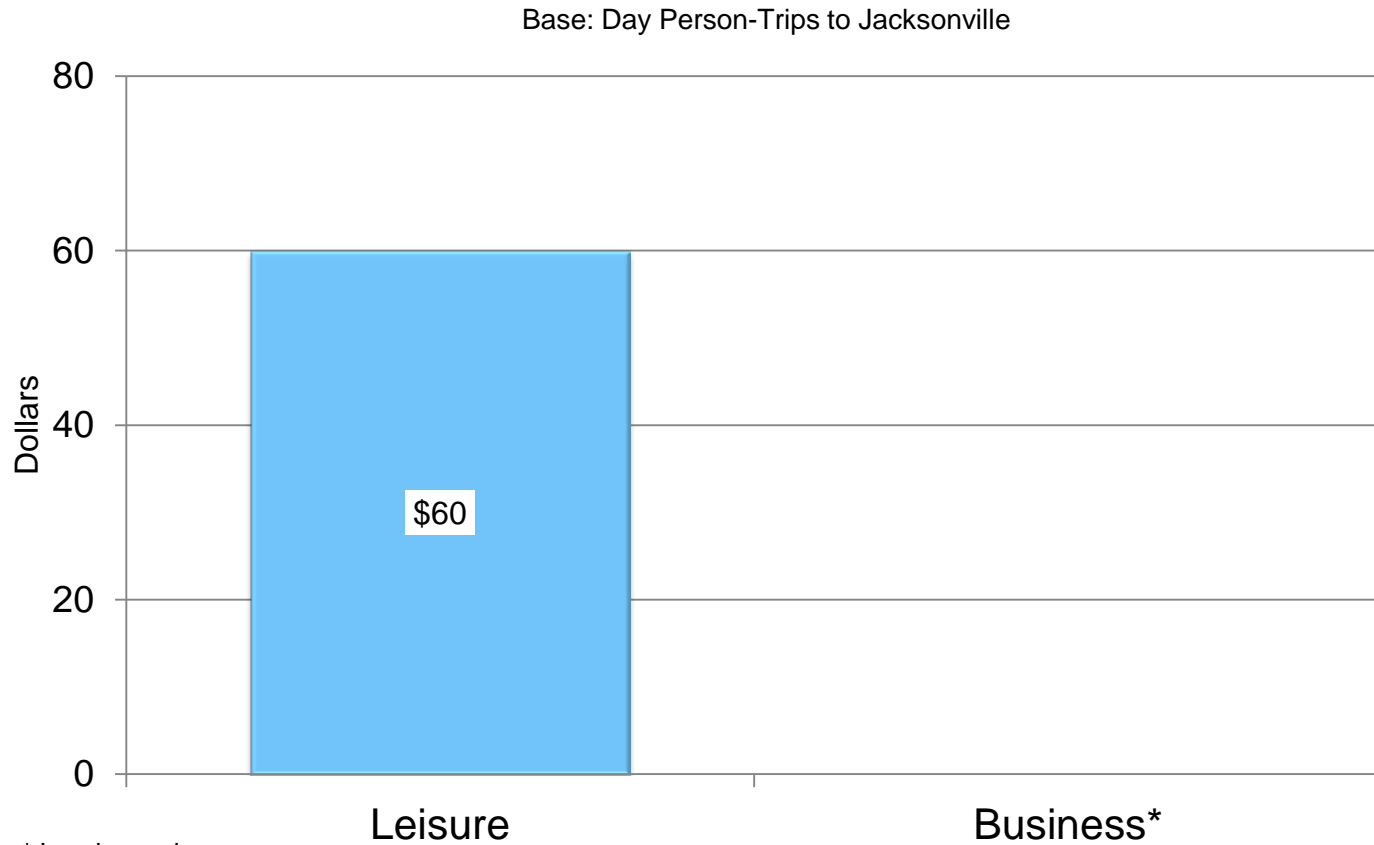


# 2016 Average Per Person Expenditures on Day Trips — By Sector

Base: Day Person-Trips to Jacksonville



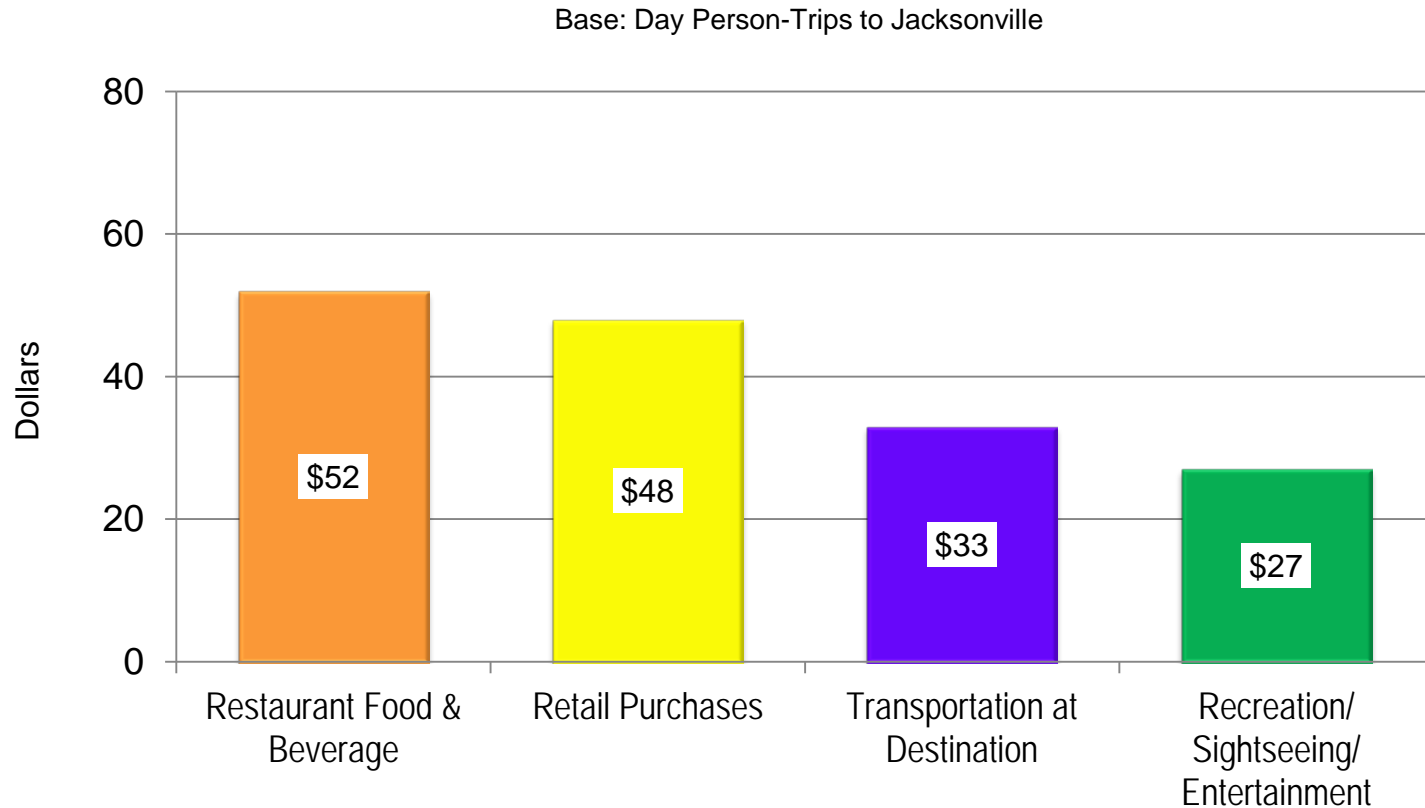
# 2016 Average Per Person Expenditures on Day Trips — by Trip Purpose



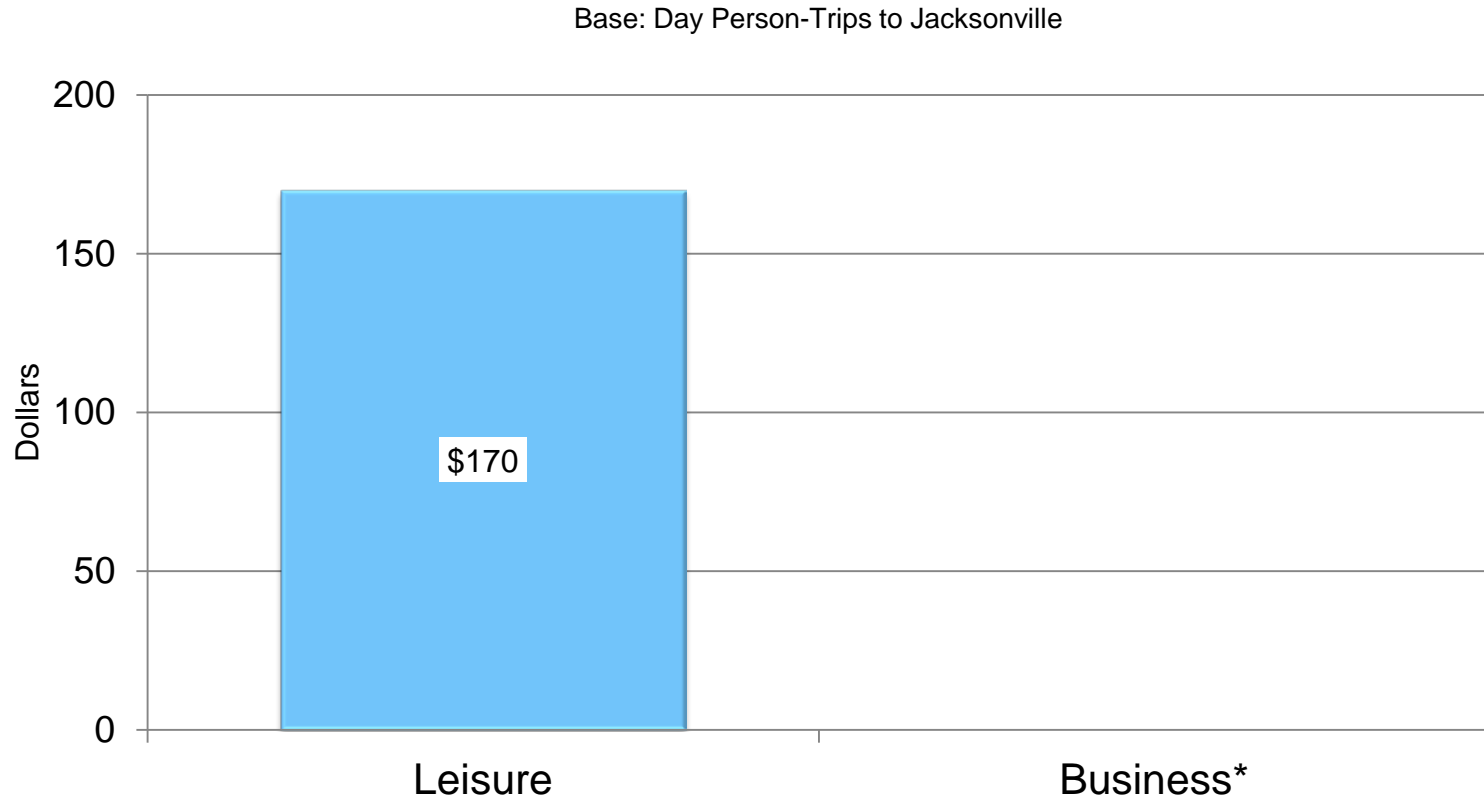
\* Low base sizes



# 2016 Average Per Party Expenditures on Day Trips — By Sector



# 2016 Average Per Party Expenditures on Day Trip — by Trip Purpose



\* Low base sizes

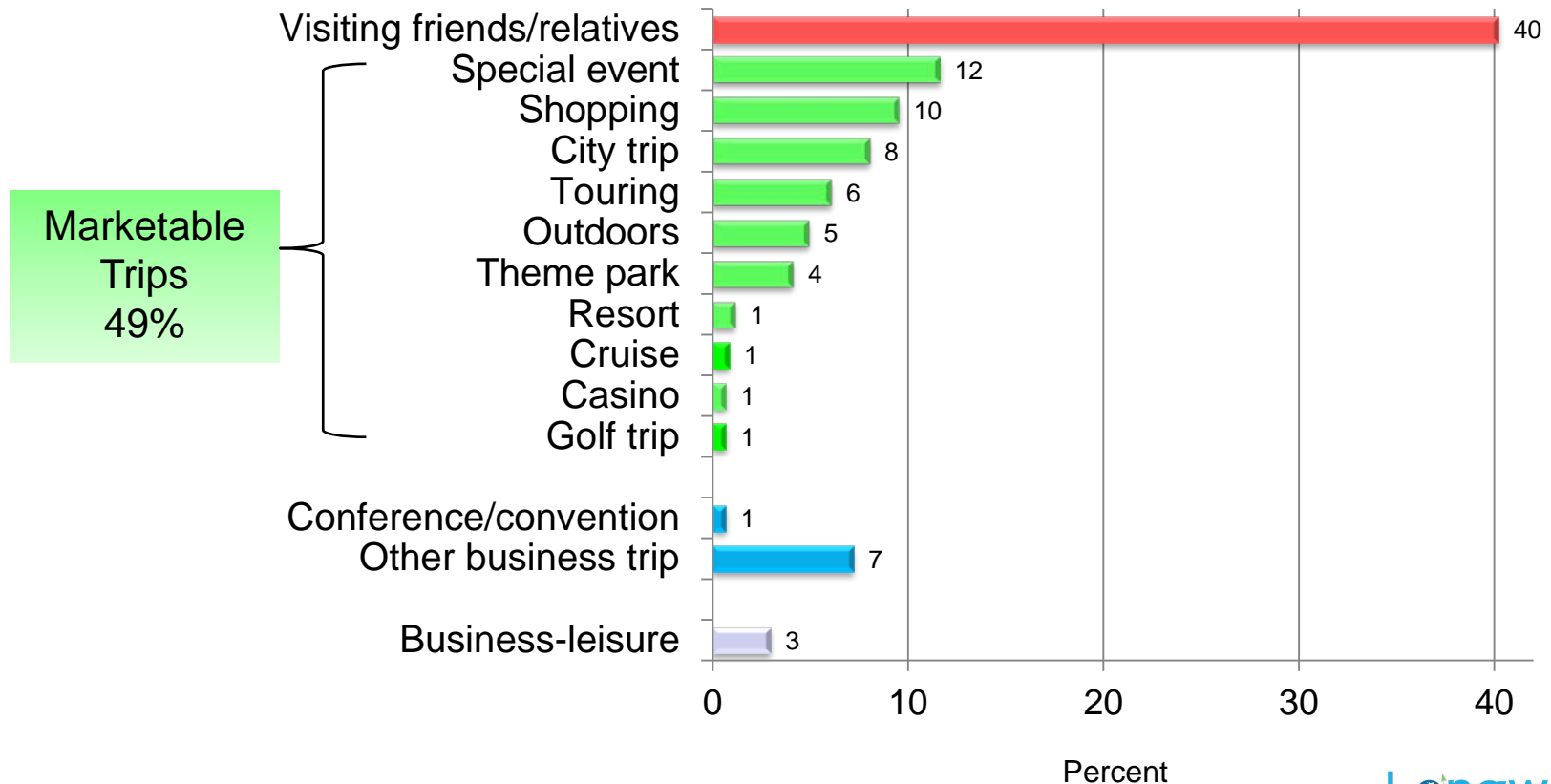


# Day Trip Characteristics

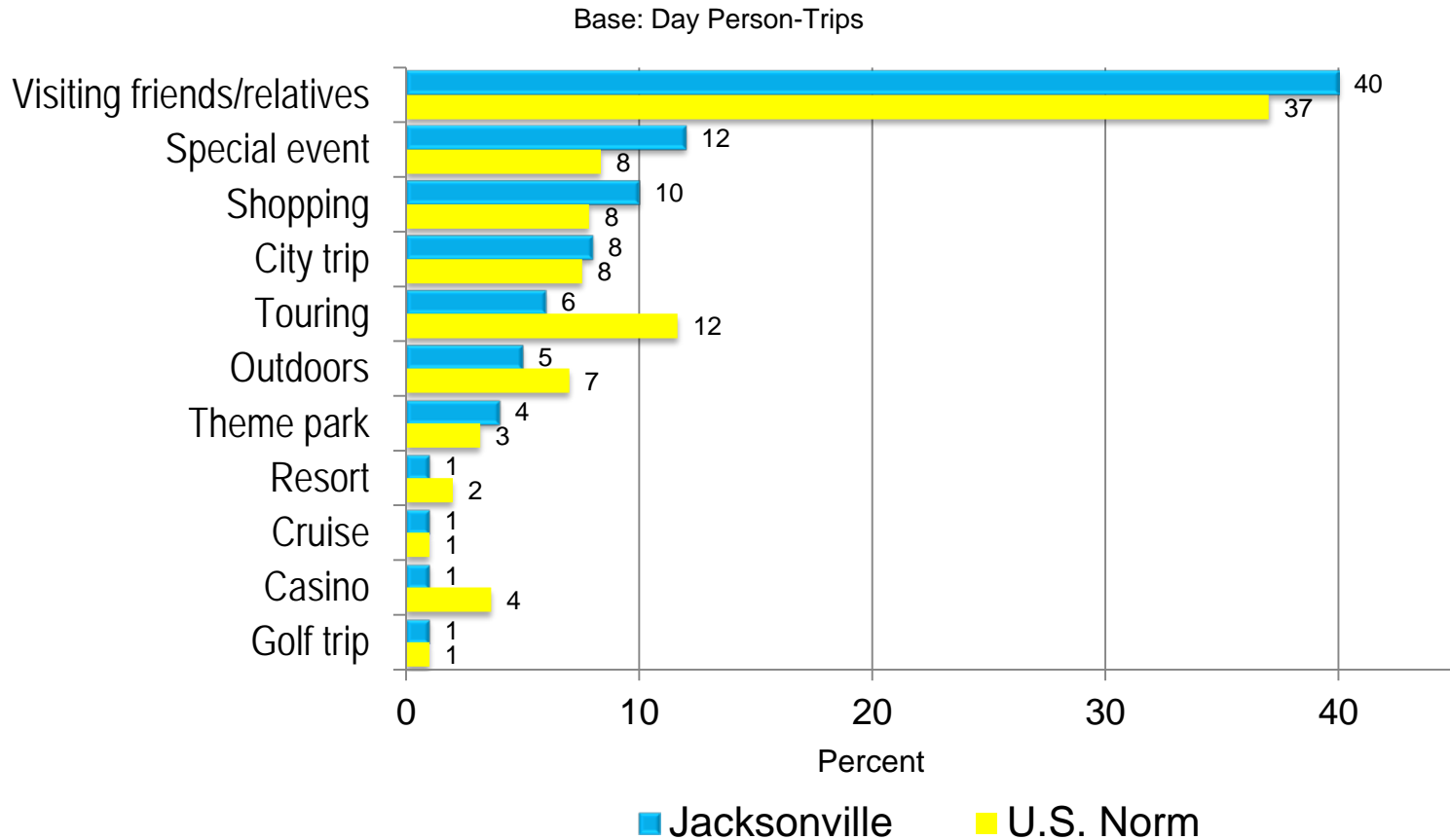


# 2016 Main Purpose of Trip

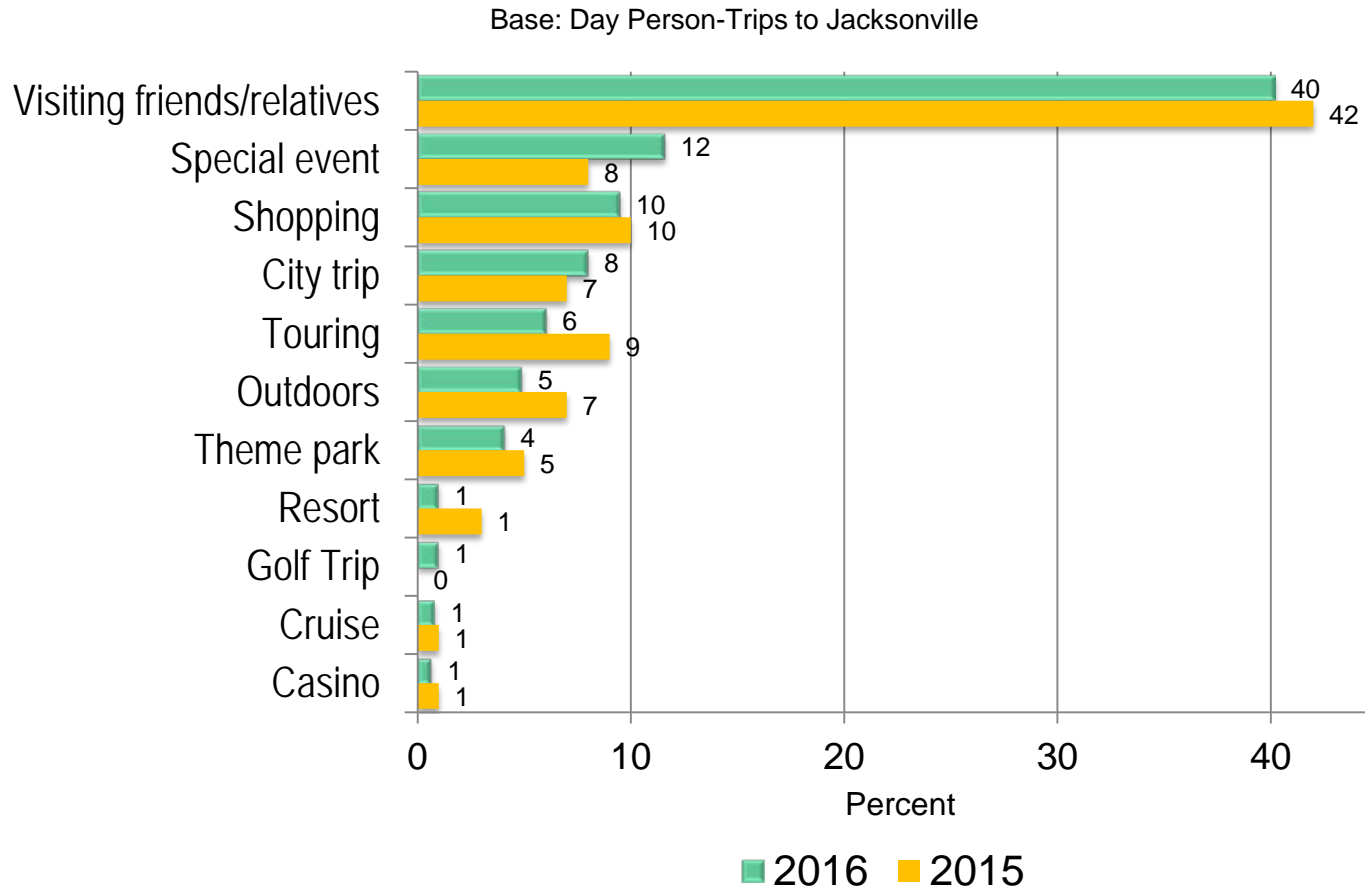
Base: Day Person-Trips to Jacksonville



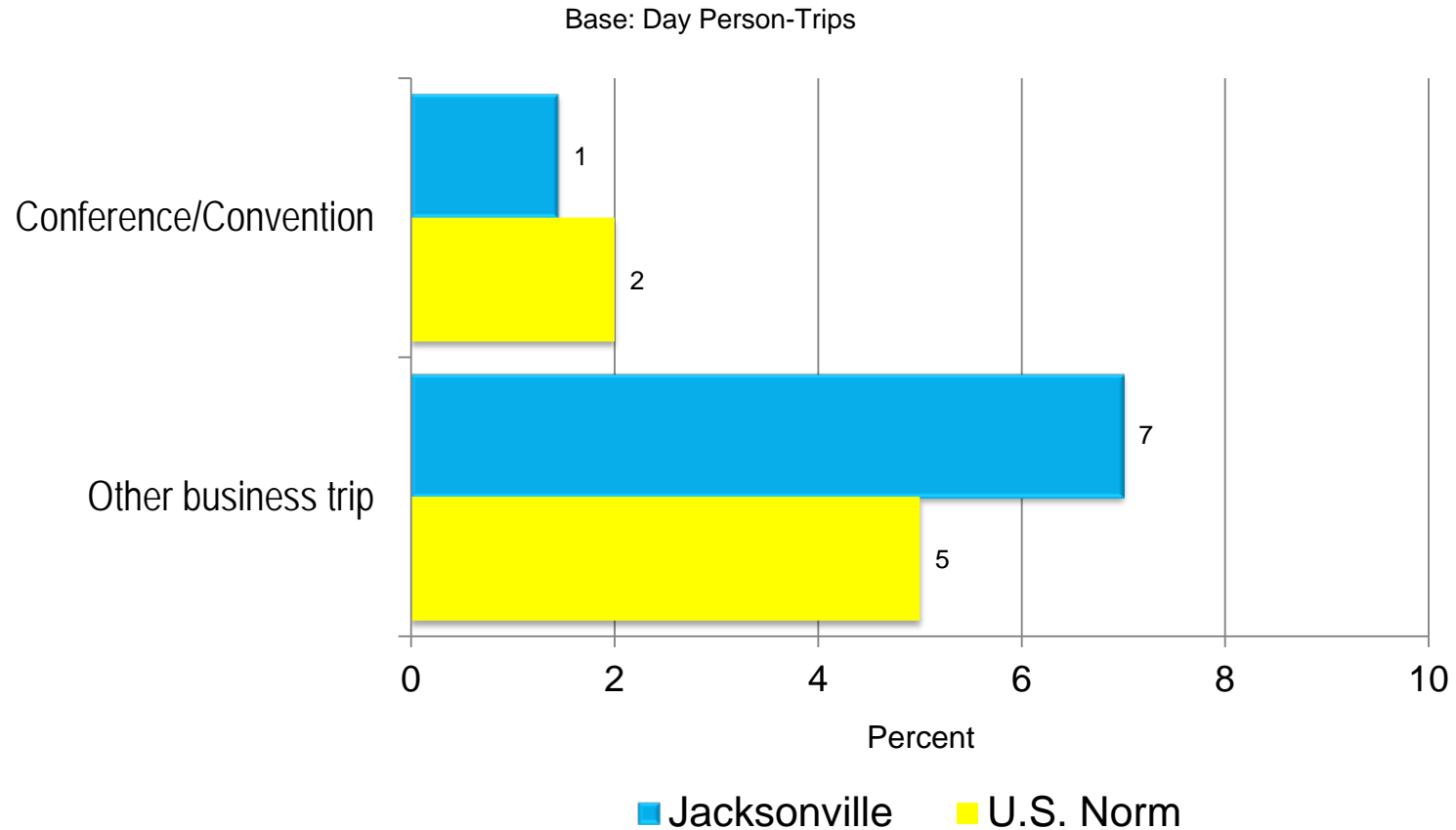
# Main Purpose of Leisure Trip — Jacksonville vs. National Norm



# Main Purpose of Day Leisure Trip – 2016 vs. 2015

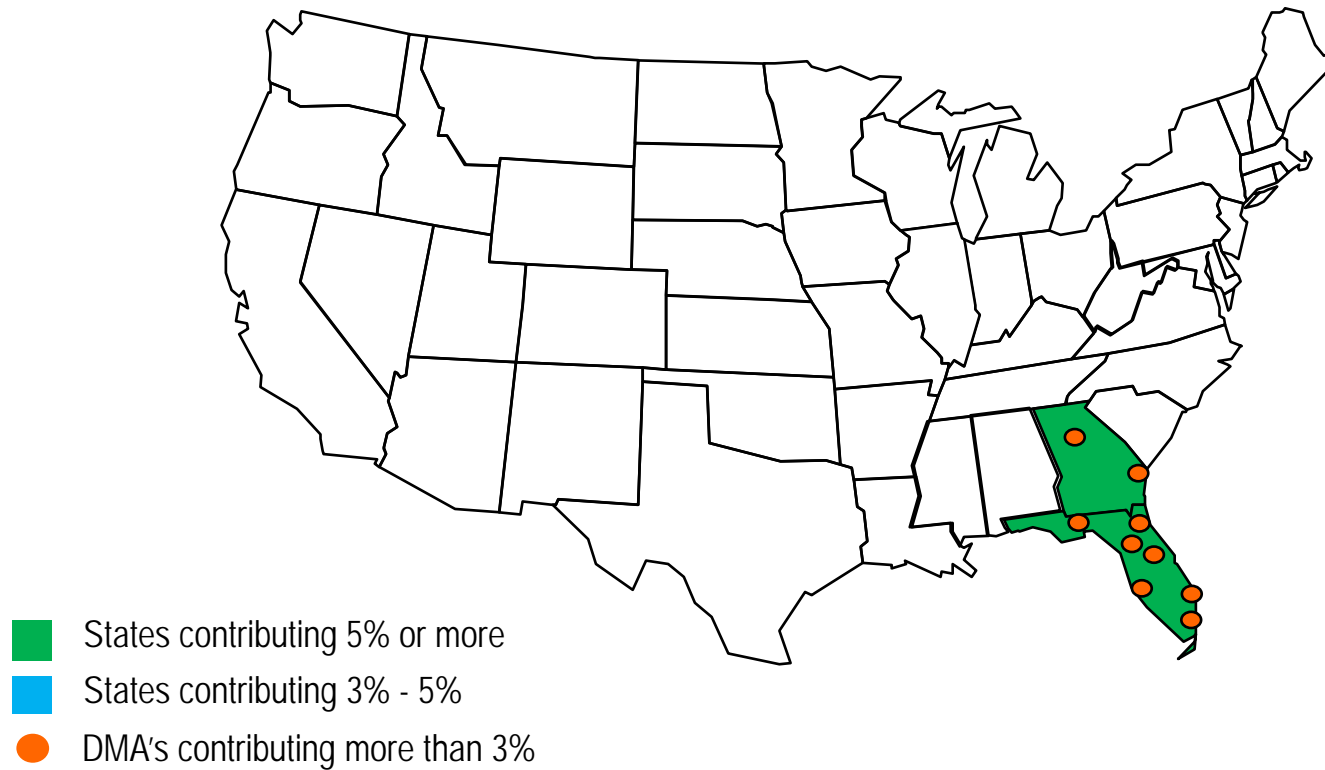


# Main Purpose of Day Business Trip — Jacksonville vs. National Norm



# Sources of Business

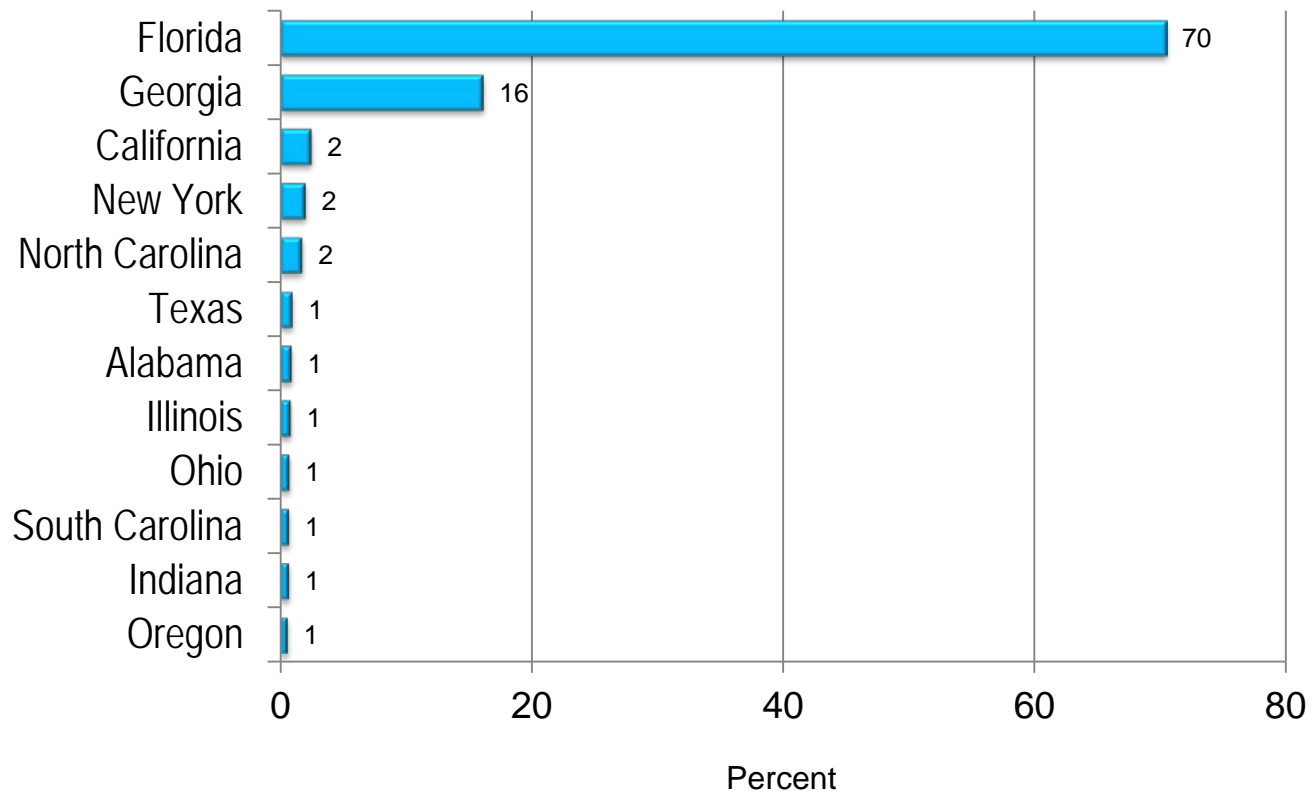
Base: Day Person-Trips to Jacksonville





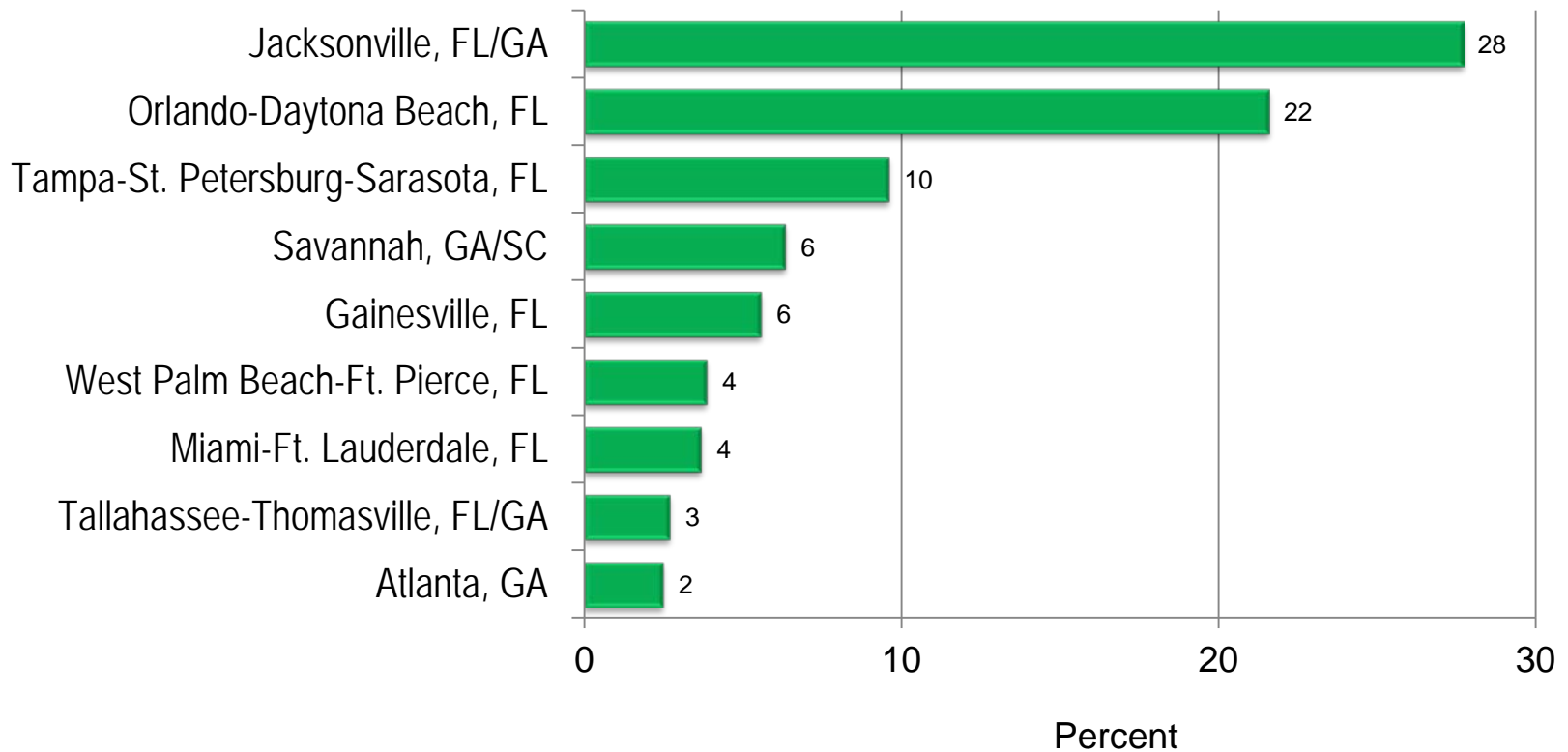
# 2016 State Origin Of Trip

Base: Day Person-Trips to Jacksonville

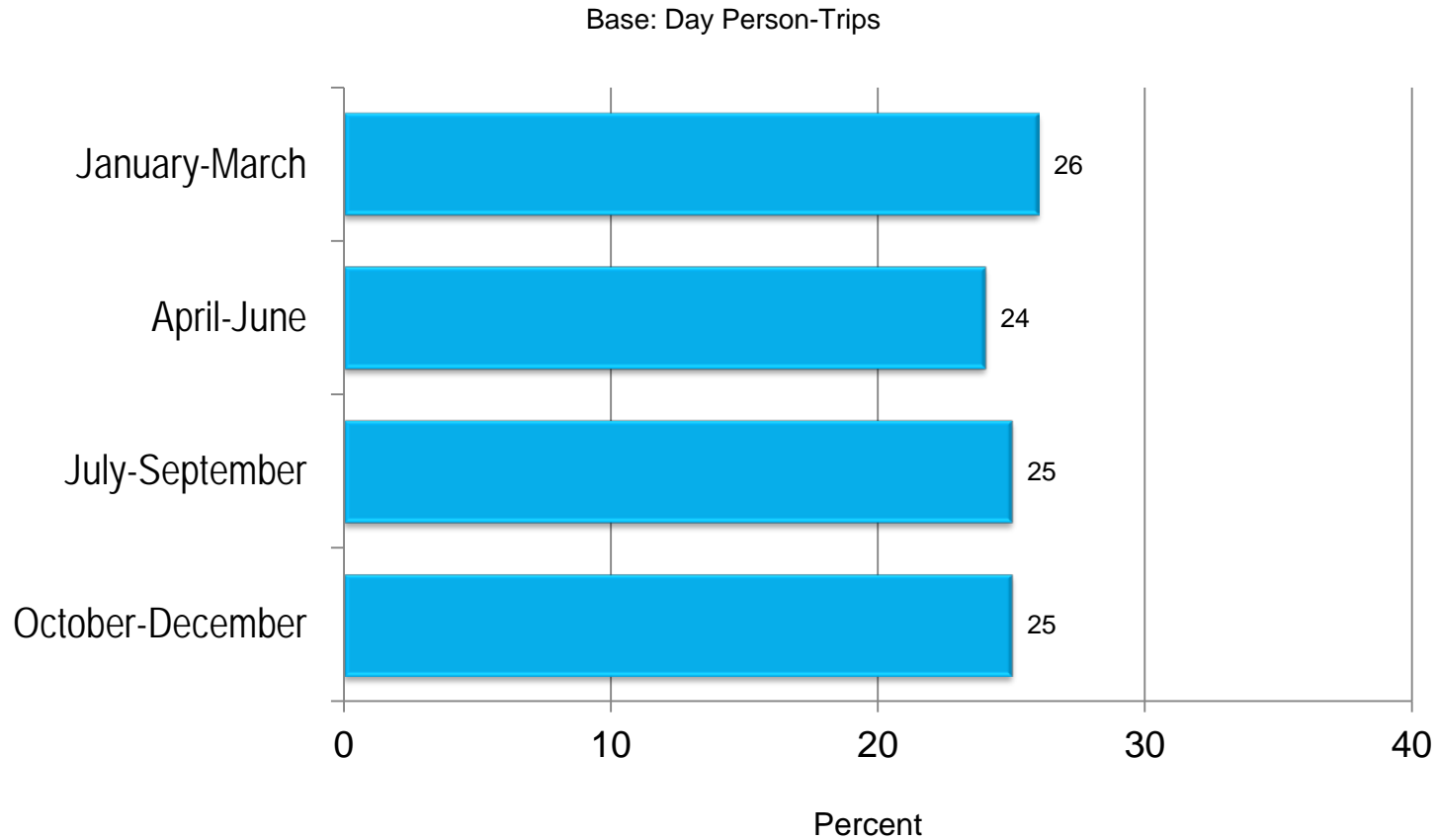


# 2016 DMA Origin Of Trip

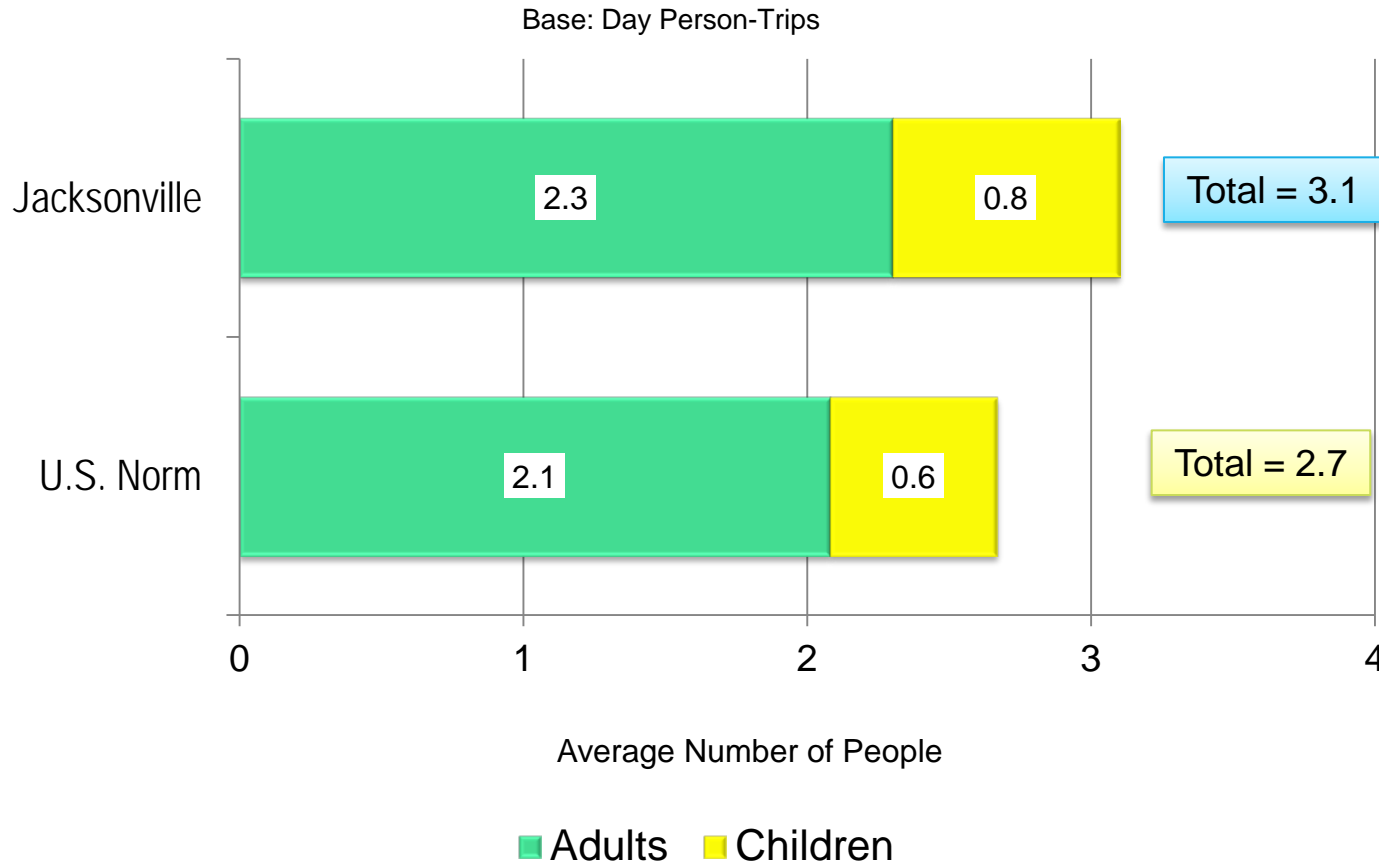
Base: Day Person-Trips to Jacksonville



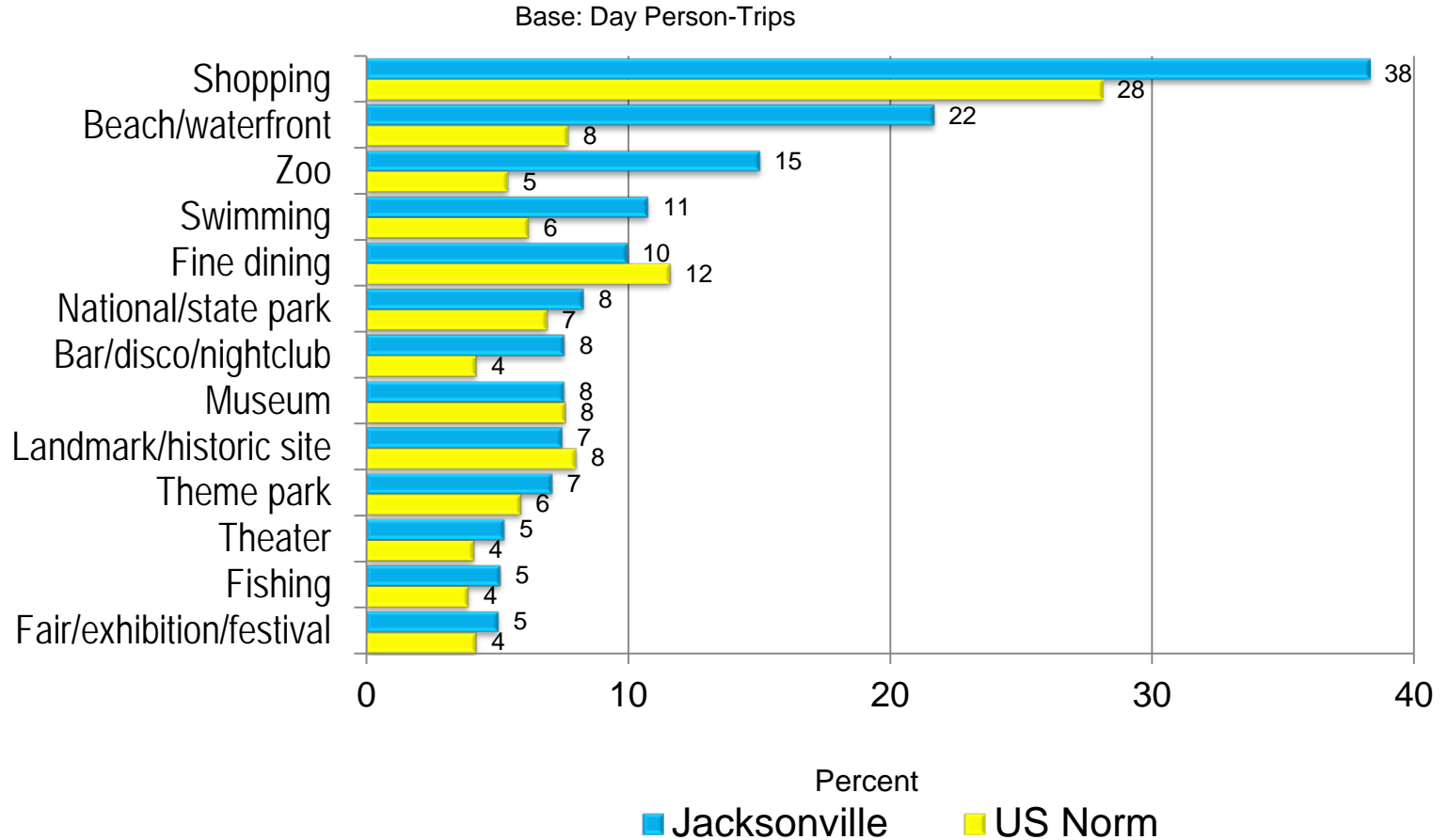
# 2016 Season of Trip



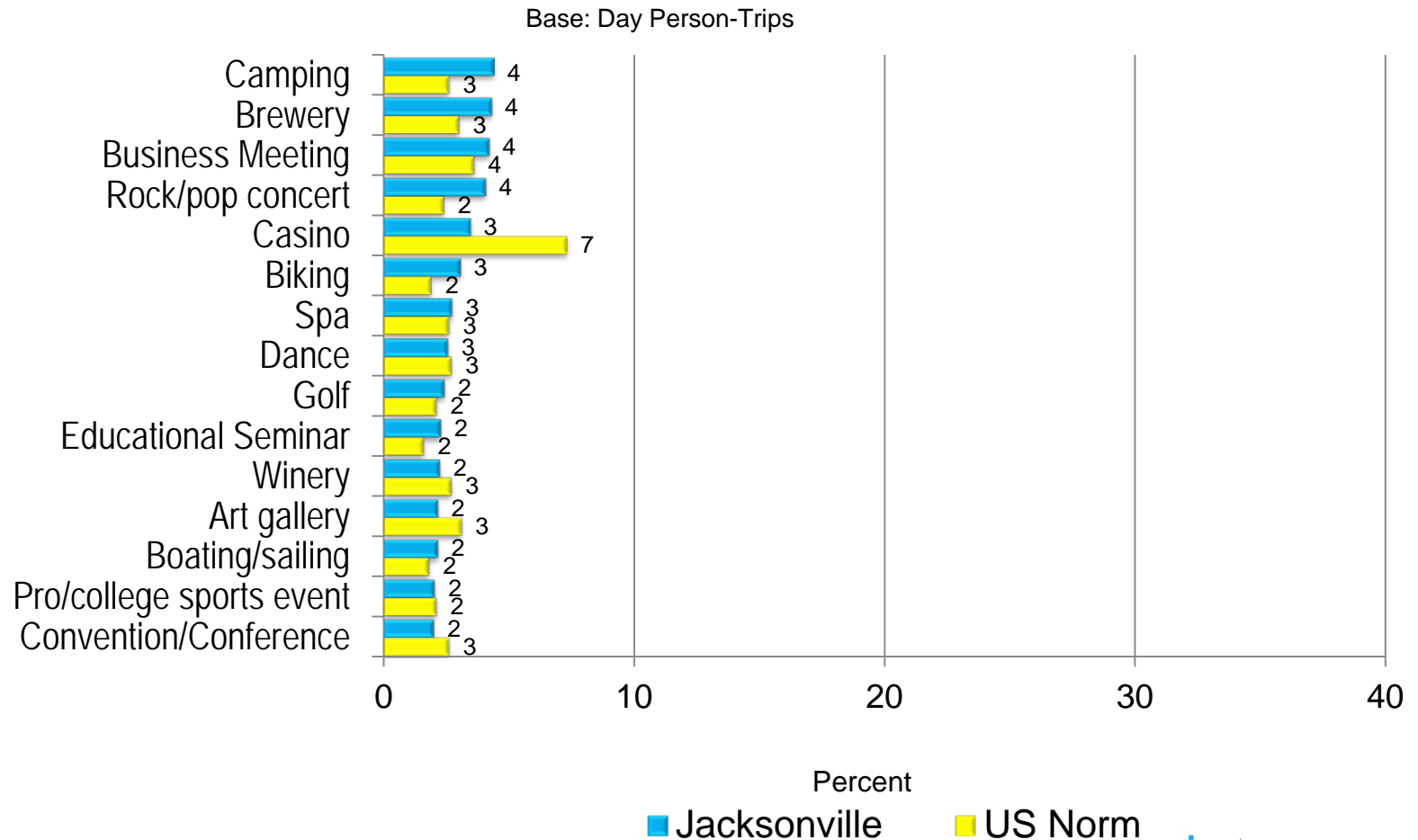
# Size of Travel Party



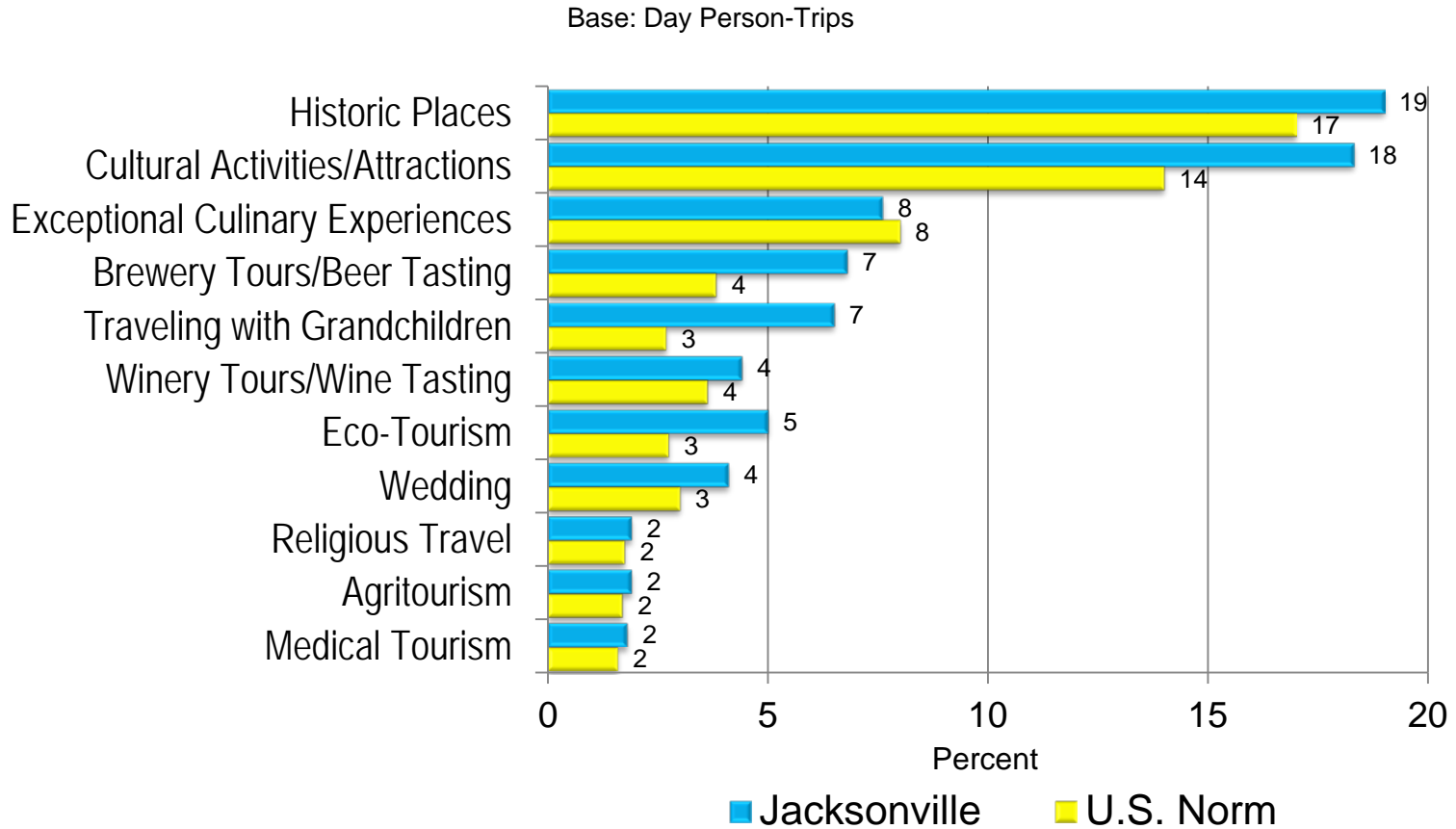
# Activities and Experiences



# Activities and Experiences (Cont'd)

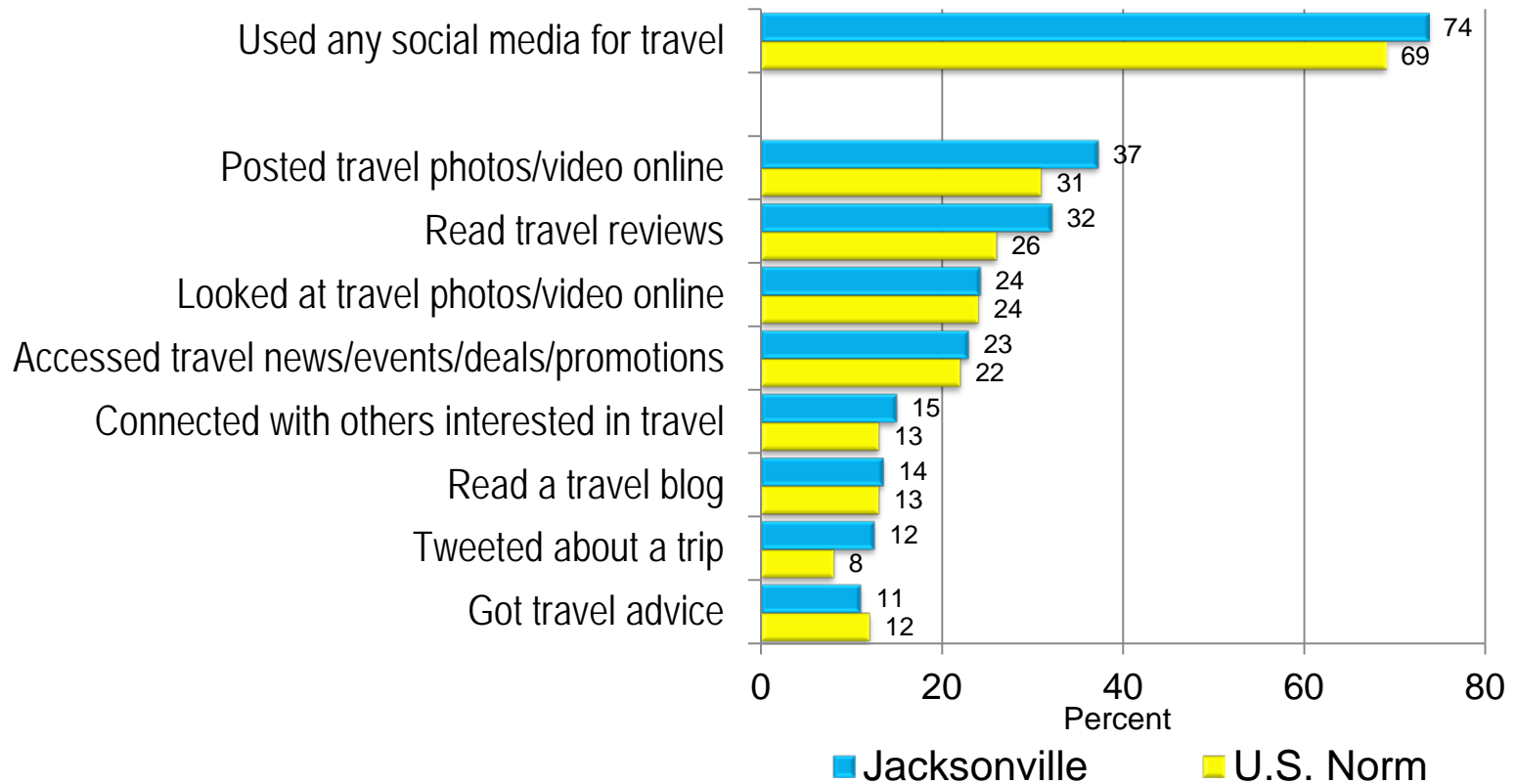


# Activities of Special Interest



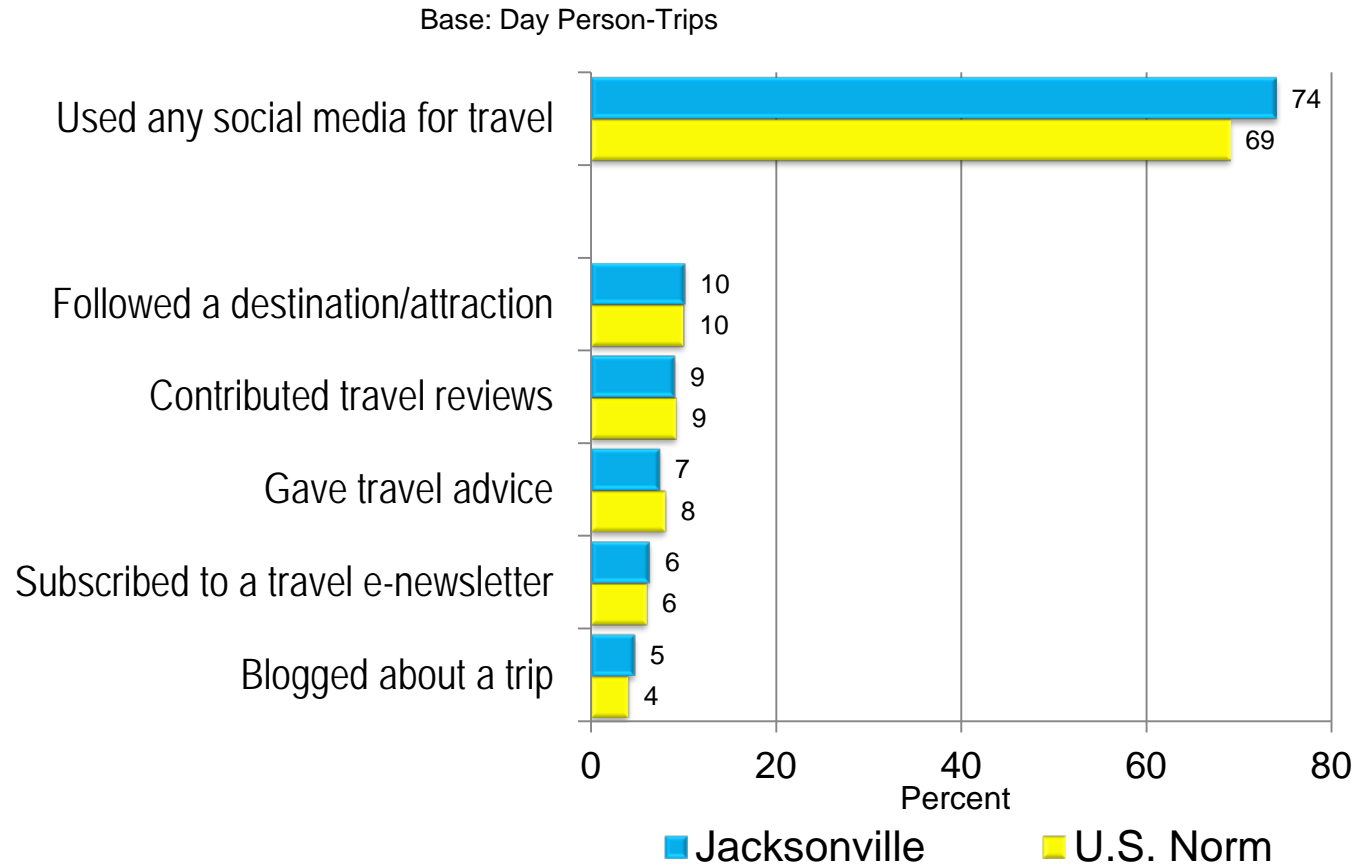
# Online Social Media Use by Travelers

Base: Day Person-Trips



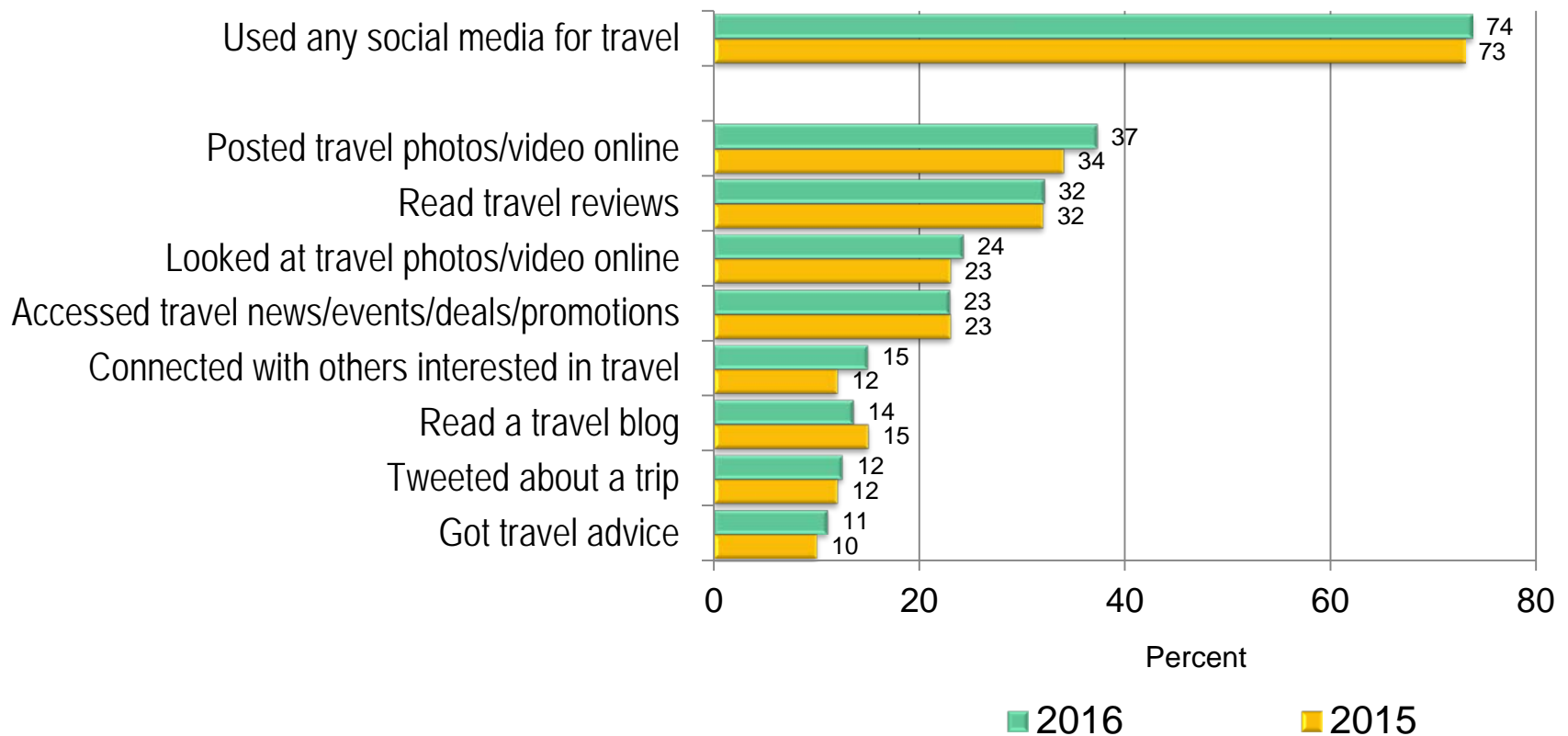


# Online Social Media Use by Travelers (Cont'd)



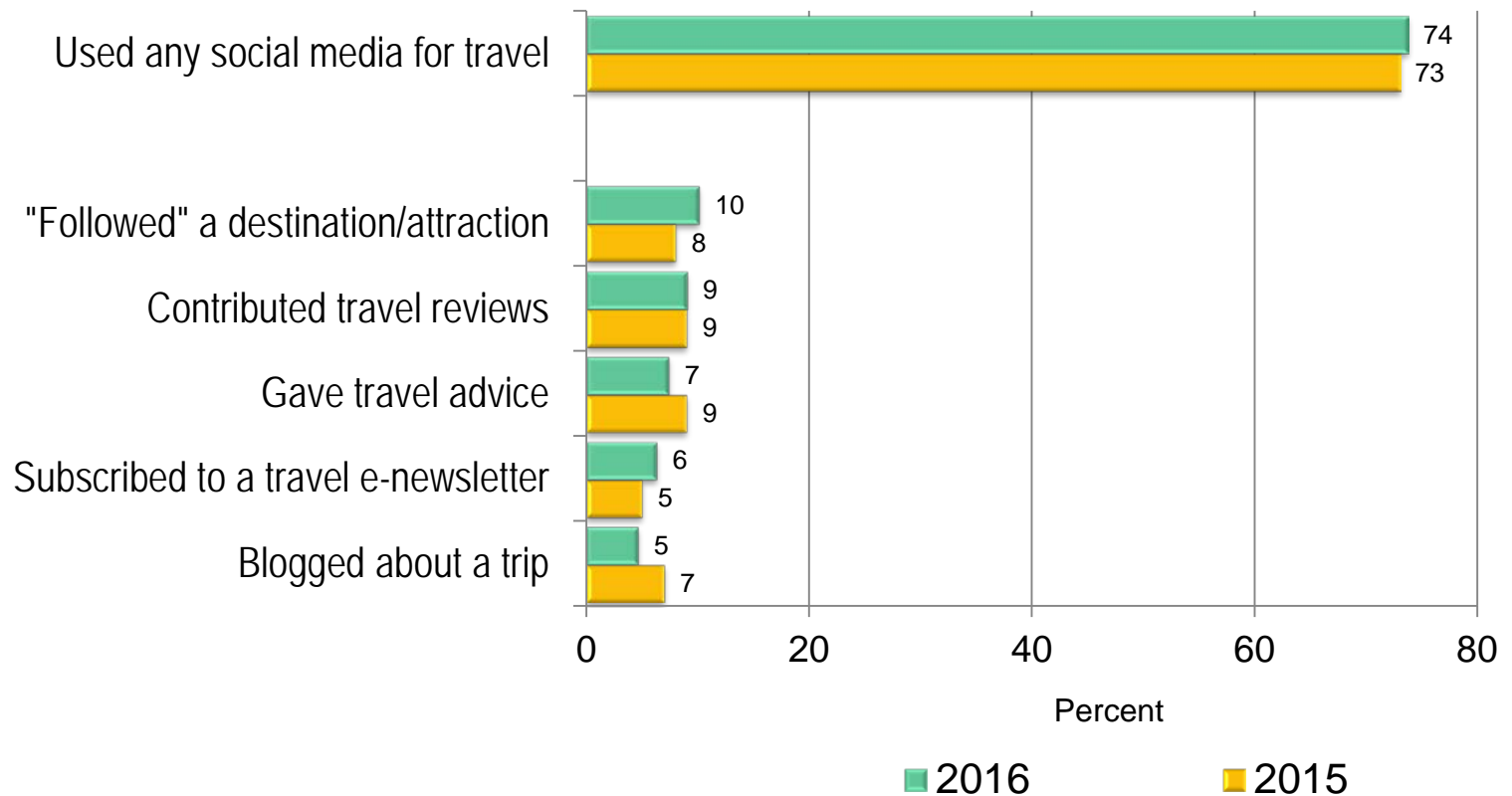
# Online Social Media Use by Travelers 2016 vs. 2015

Base: Day Person-Trips to Jacksonville

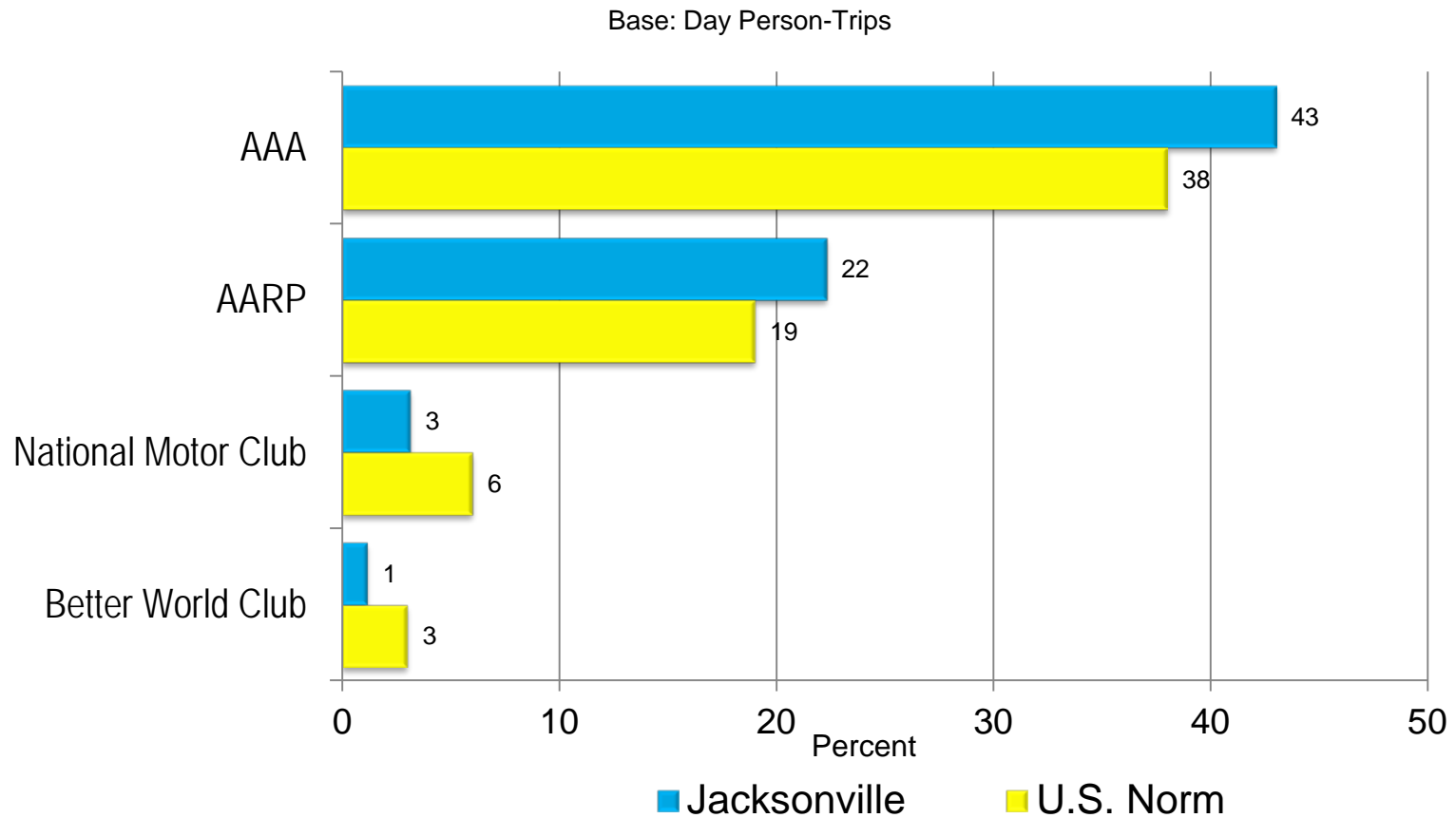


# Online Social Media Use by Travelers 2016 vs. 2015

Base: Day Person-Trips to Jacksonville



# Organization Membership

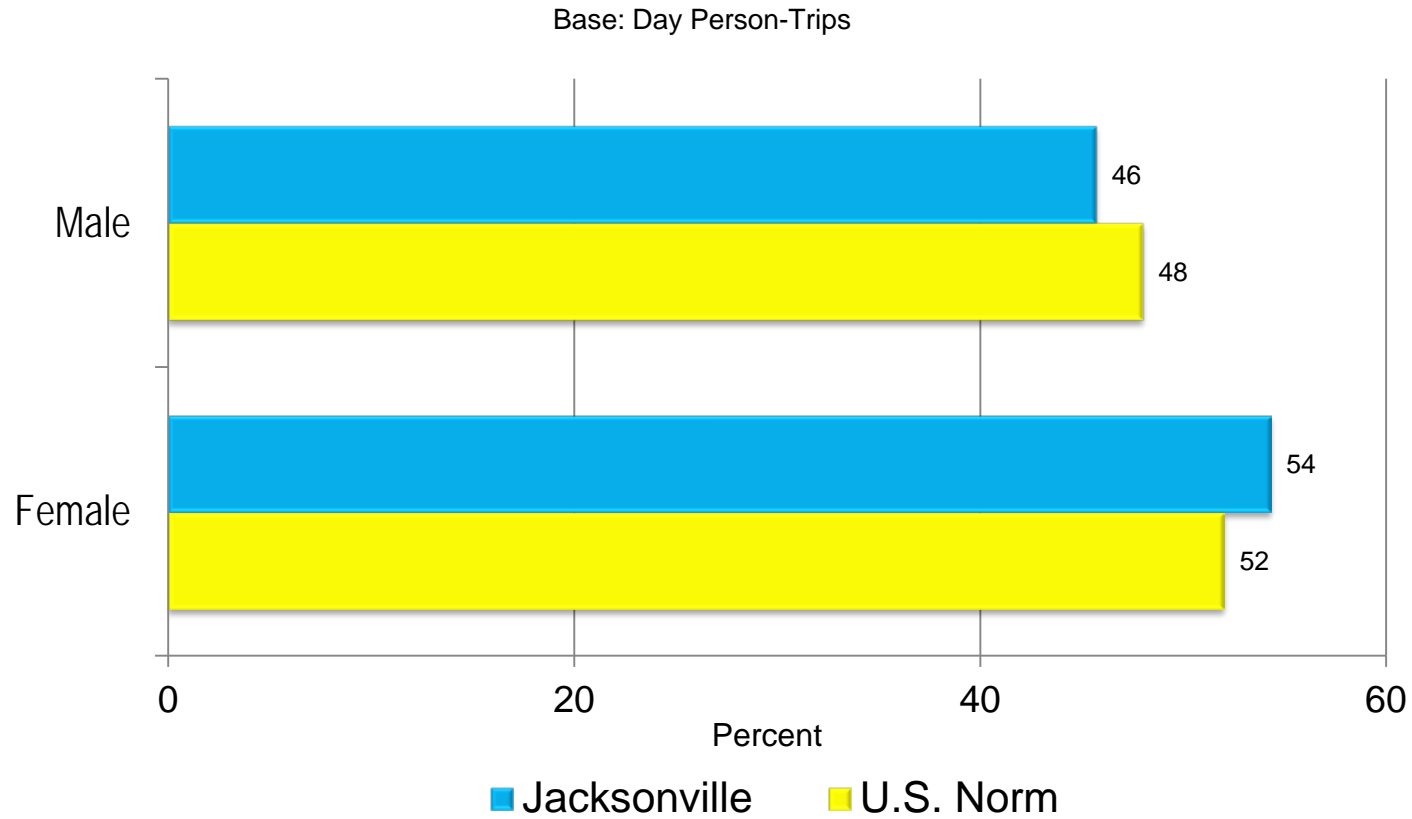




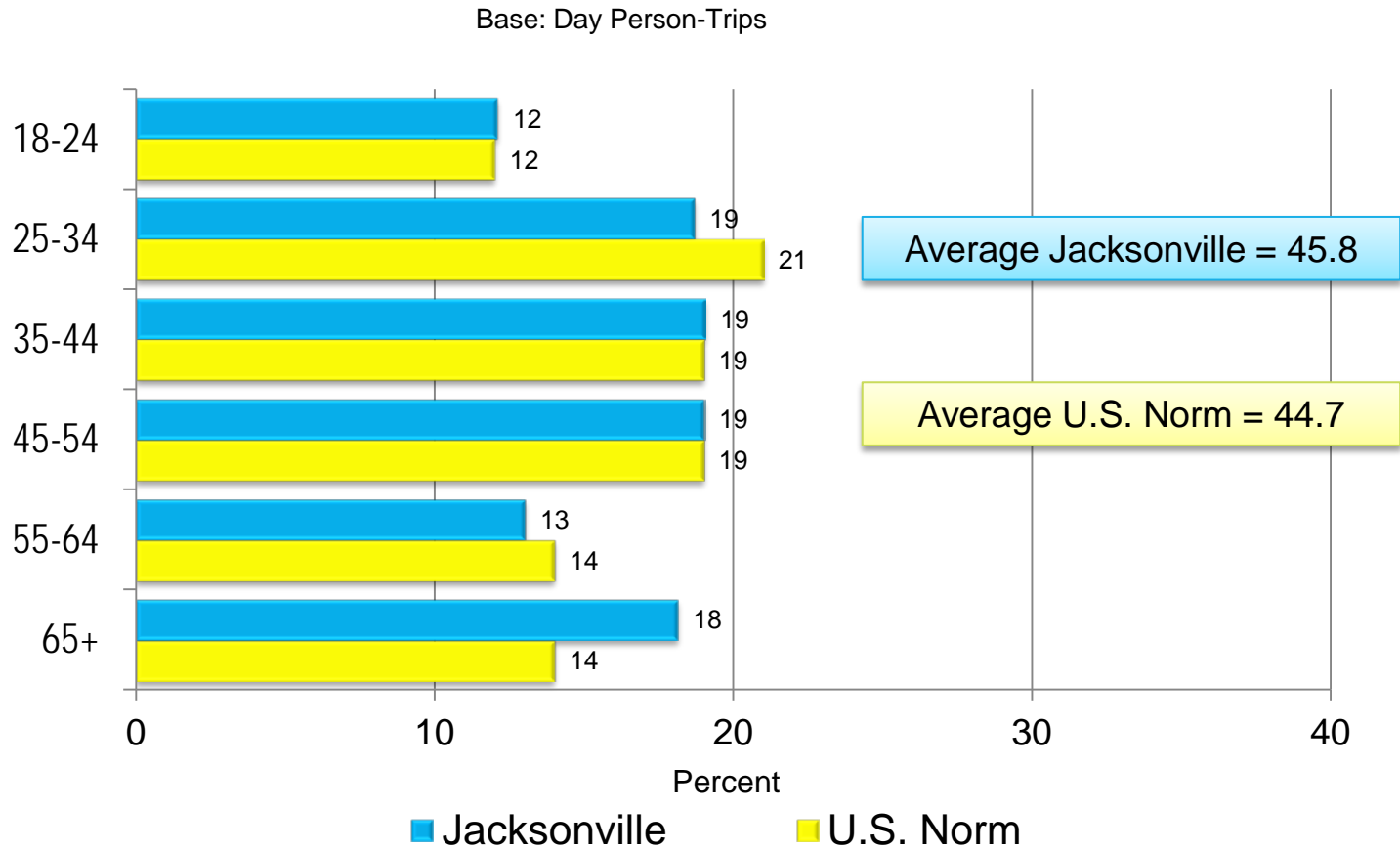
## Demographic Profile of Day Visitors



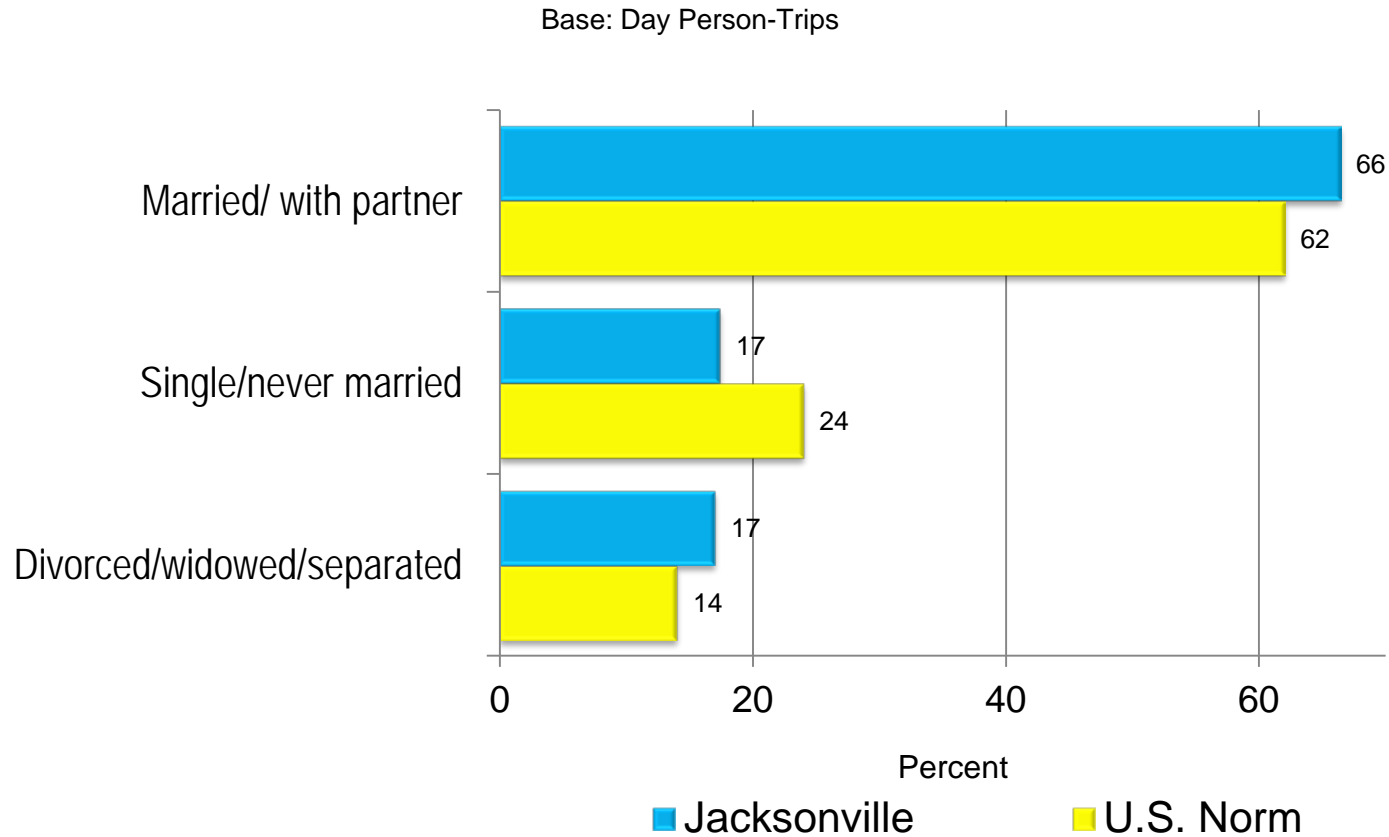
# Gender



# Age

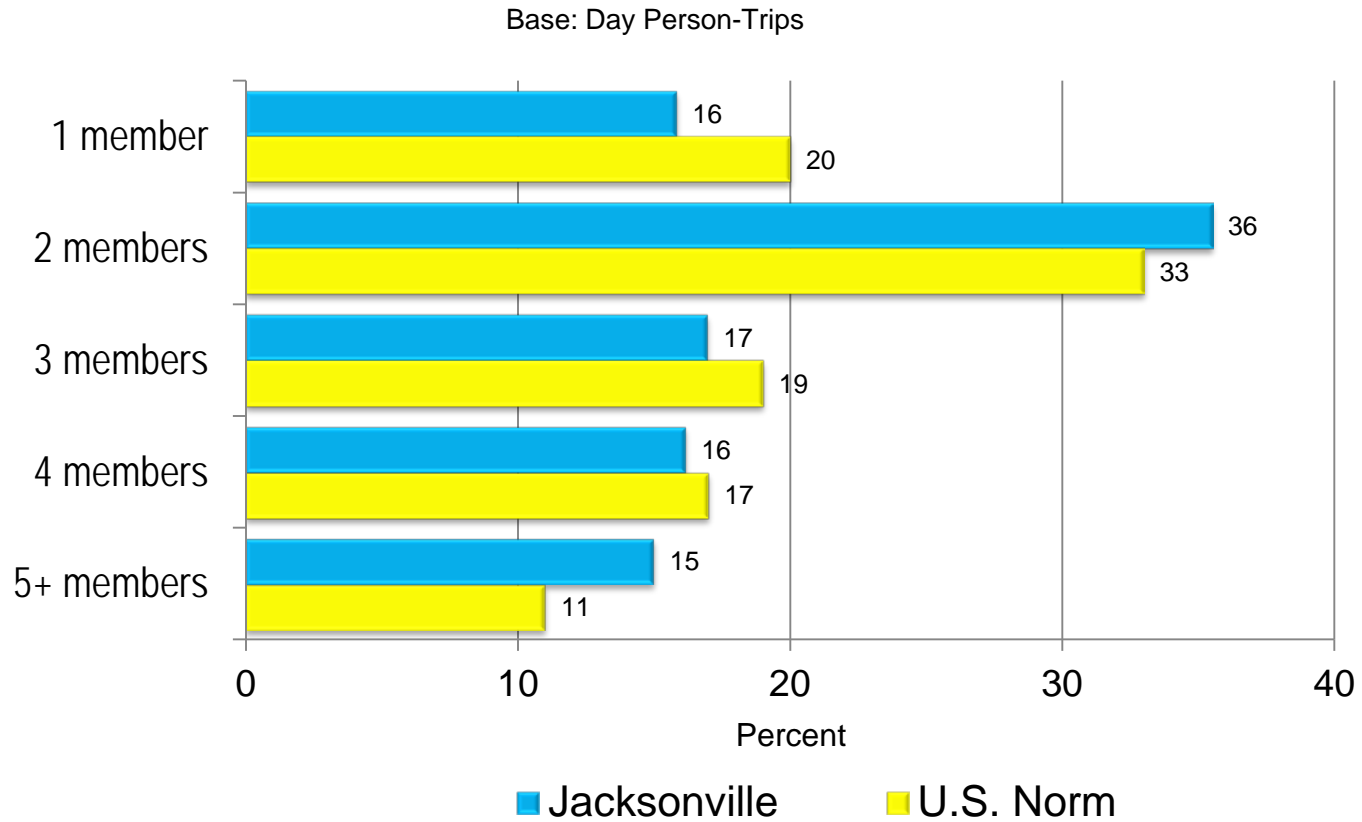


# Marital Status

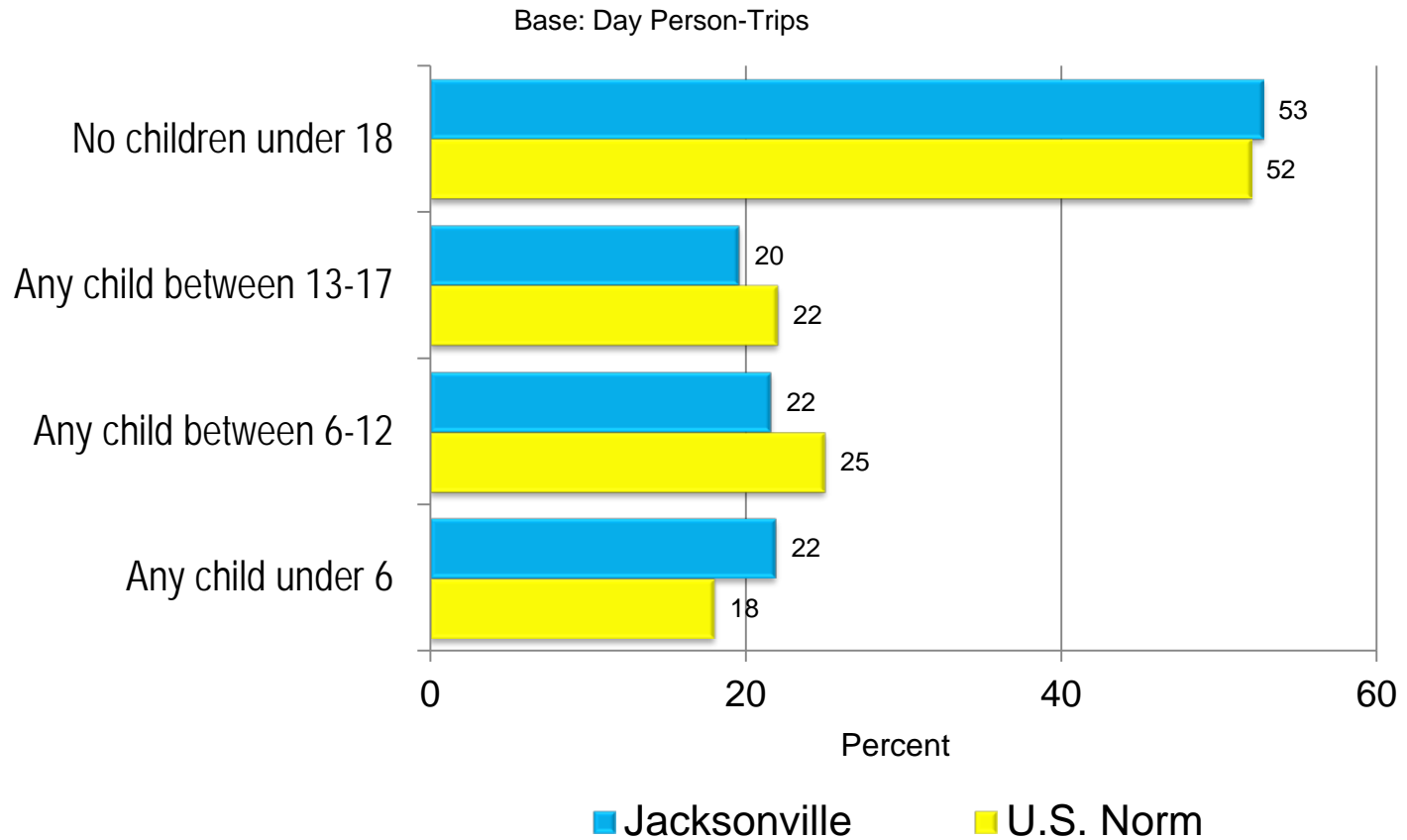




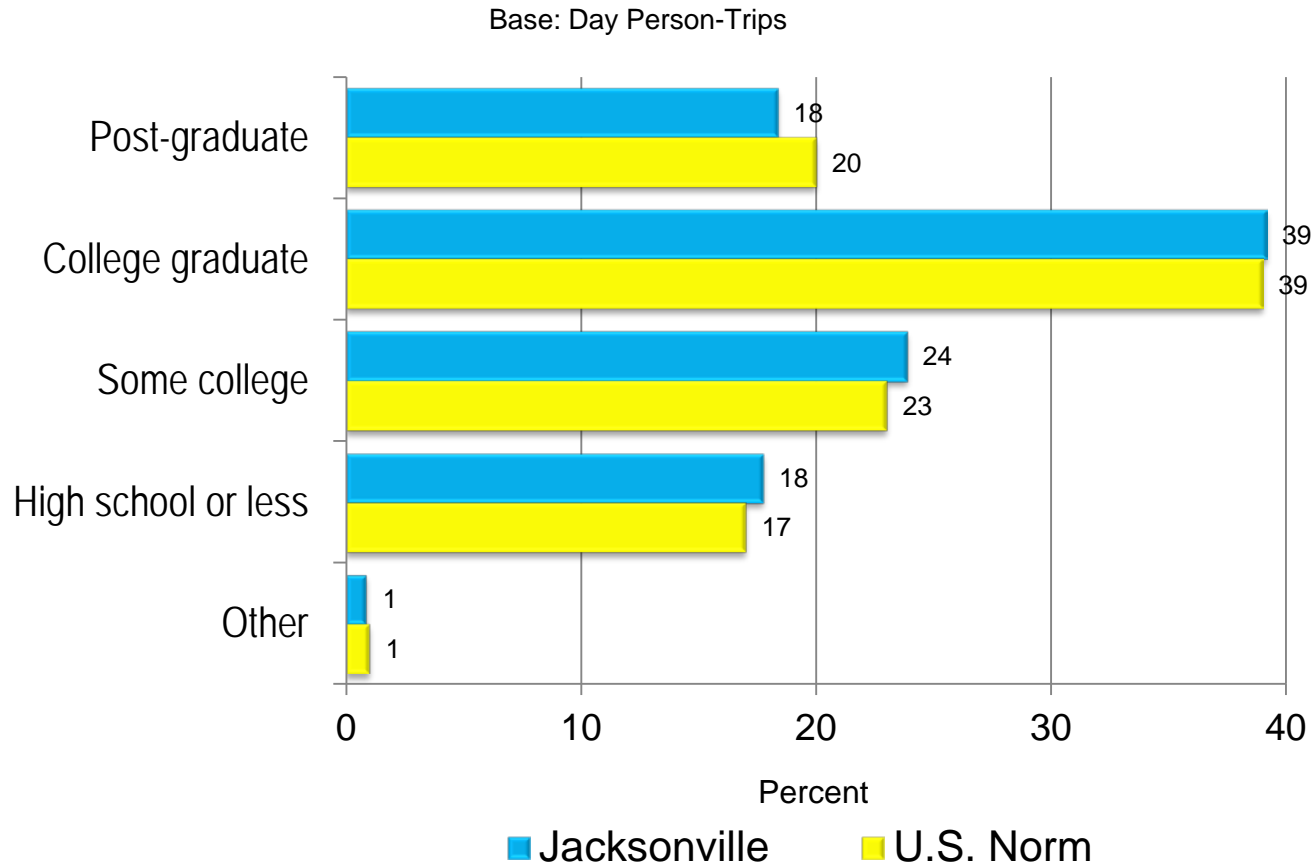
# Household Size



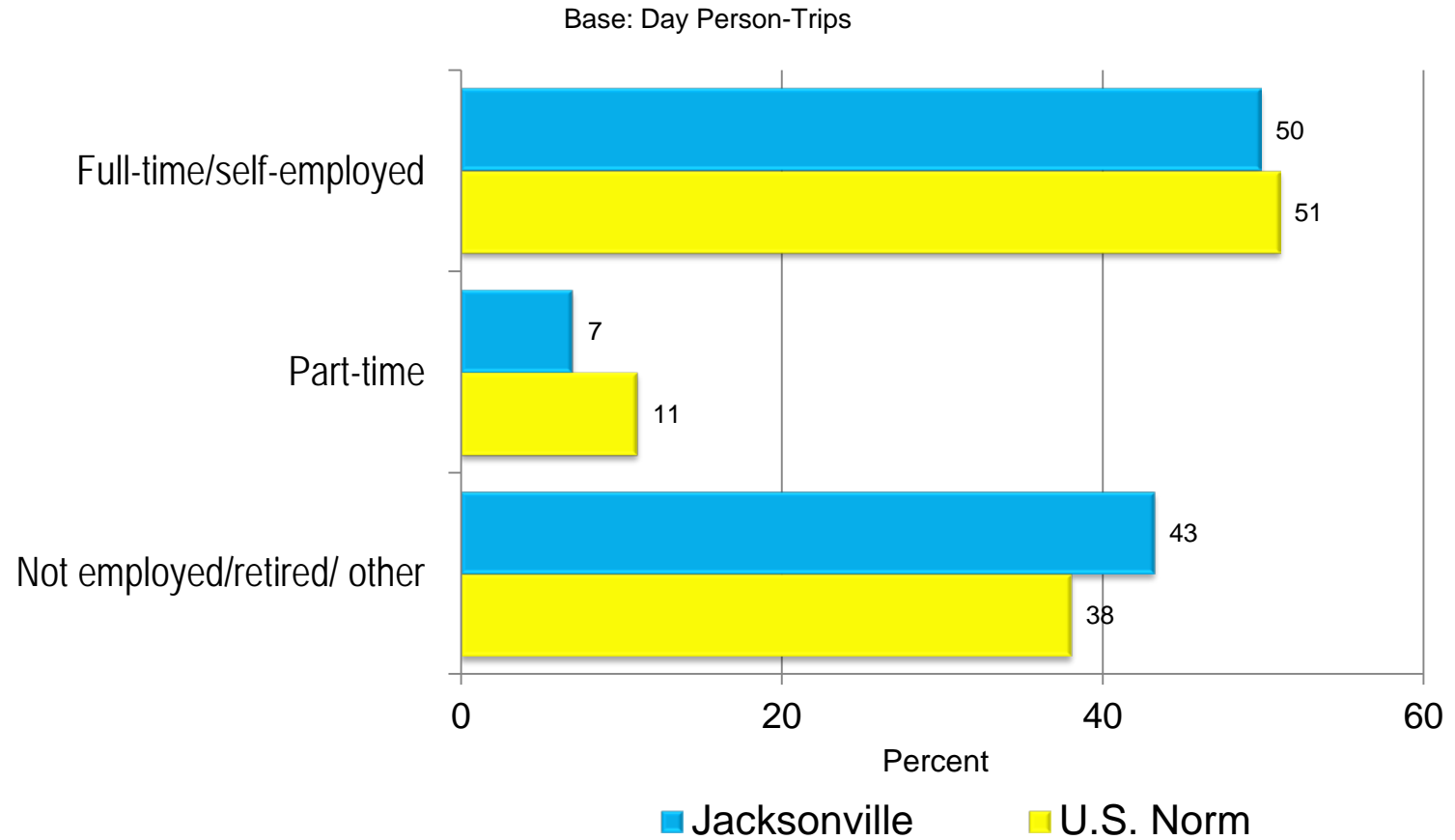
# Children in Household



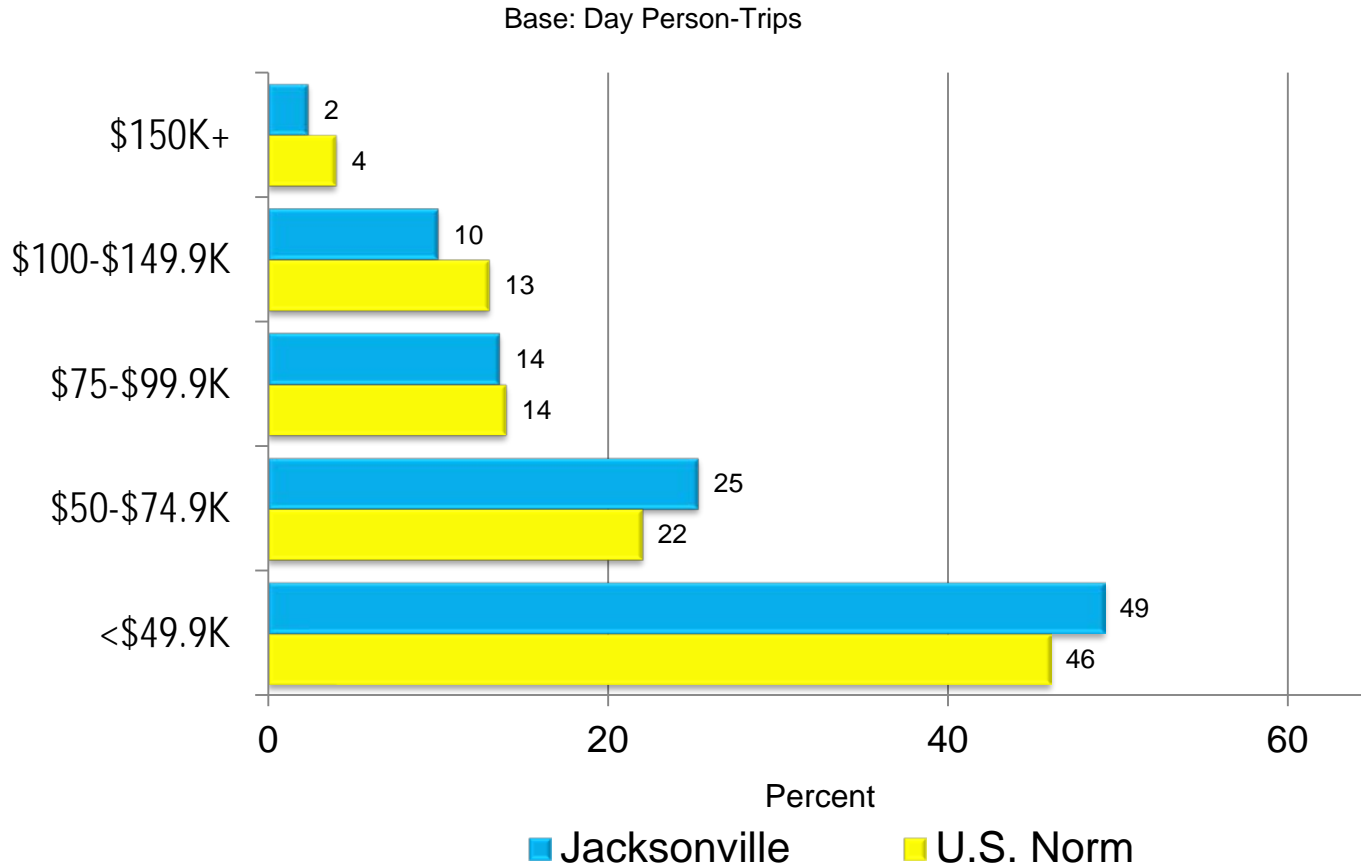
# Education



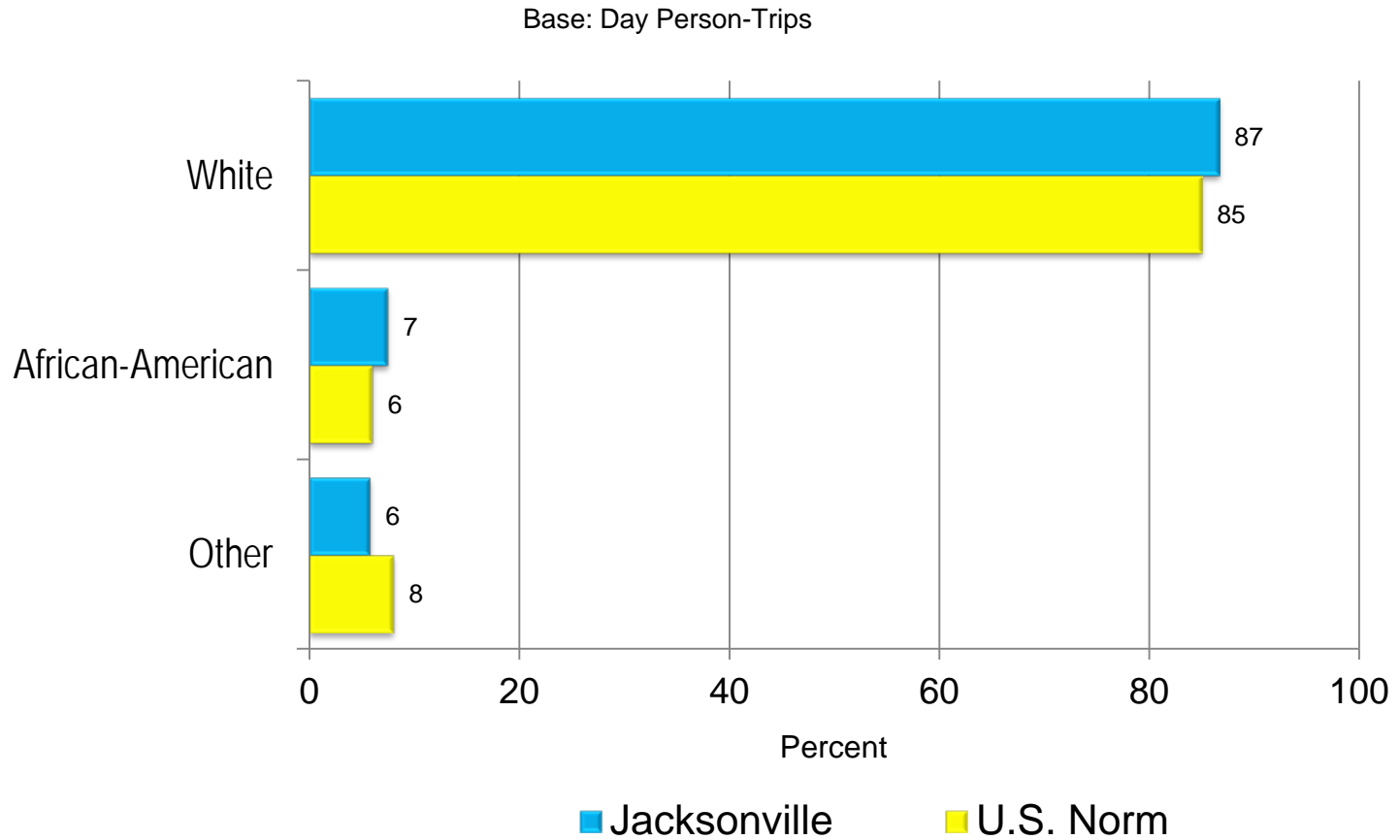
# Employment



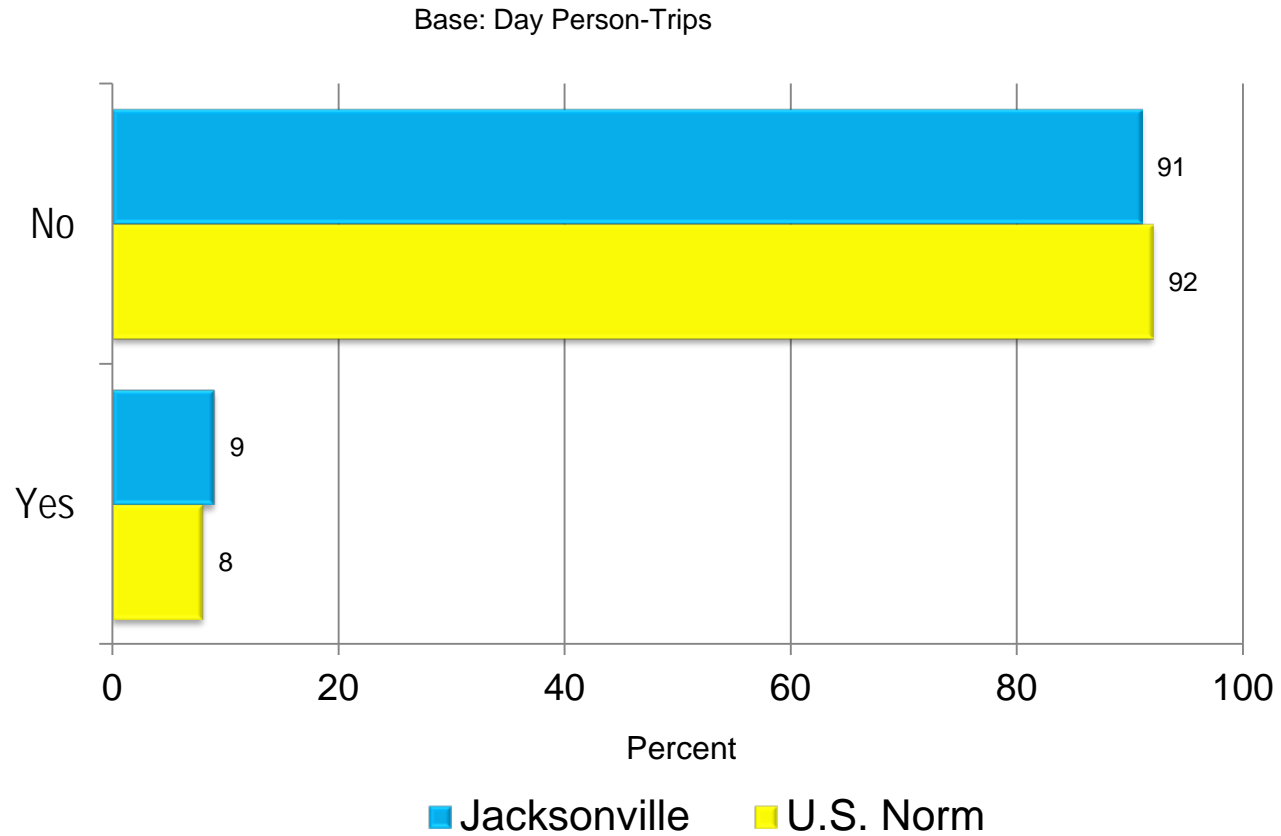
# Household Income



# 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

- **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