



Louisville Visitor Research

Travel USA®



Prepared for
Louisville Tourism
July 2019

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Introduction & Research Objectives

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 2018.

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 that is selected to be representative of the U.S. adult population

For the 2018 travel year, this yielded:

- 329,599 trips for analysis nationally
 - 233,098 overnight trips
 - 96,501 day trips
- For Louisville, the following sample was achieved in 2018:
 - 720 trips:
 - 422 overnight trips
 - 298 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



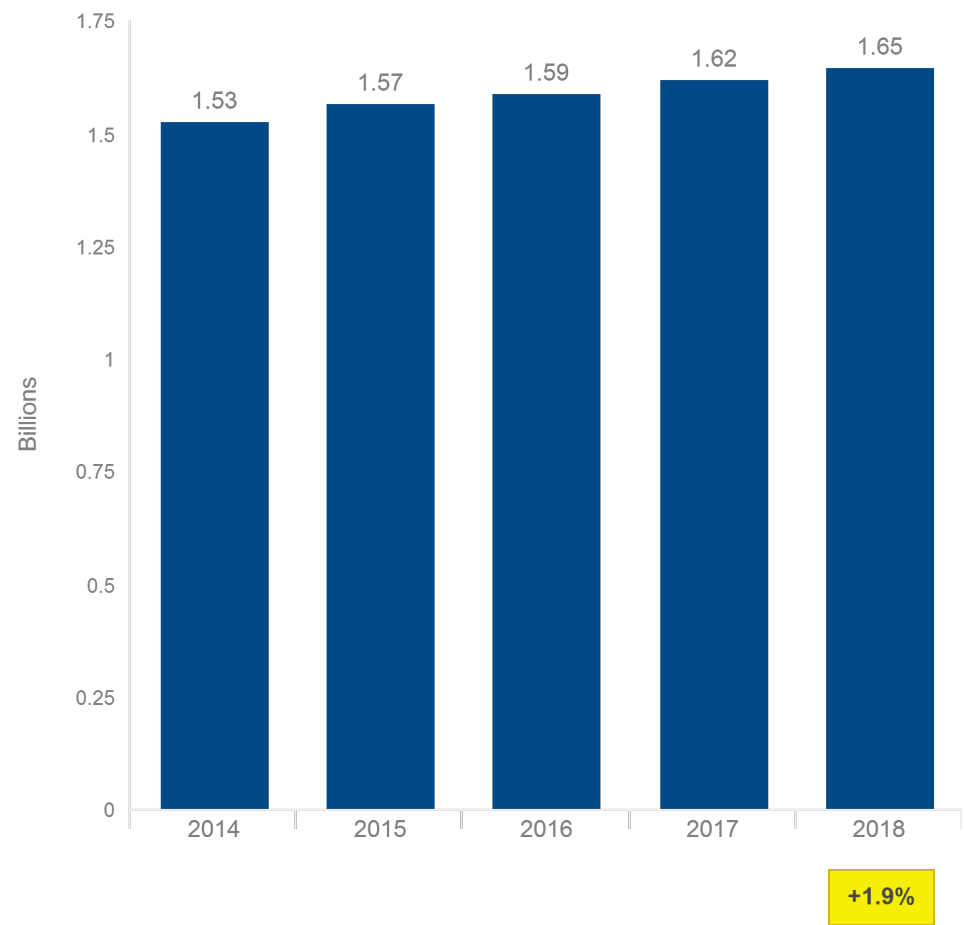
Louisville Overnight Visitor Research

Travel USA®

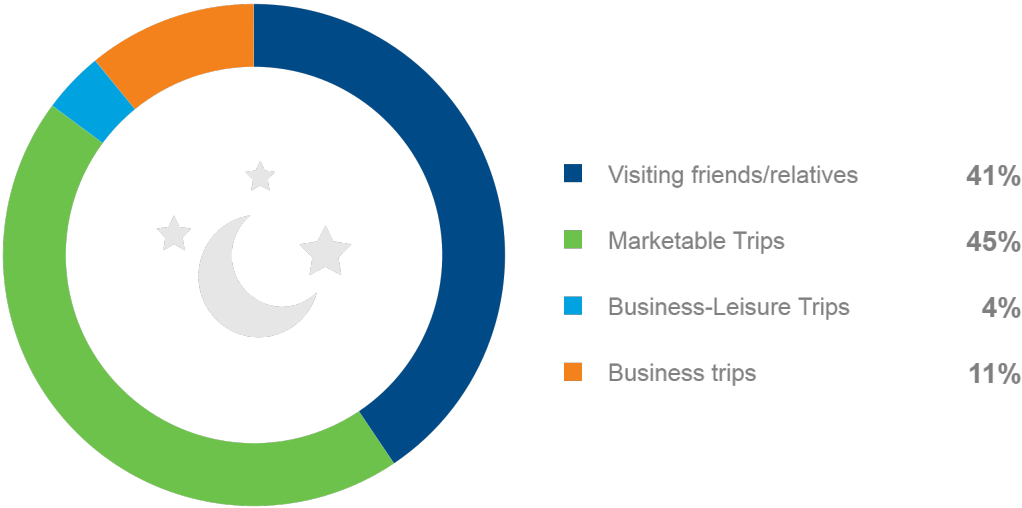


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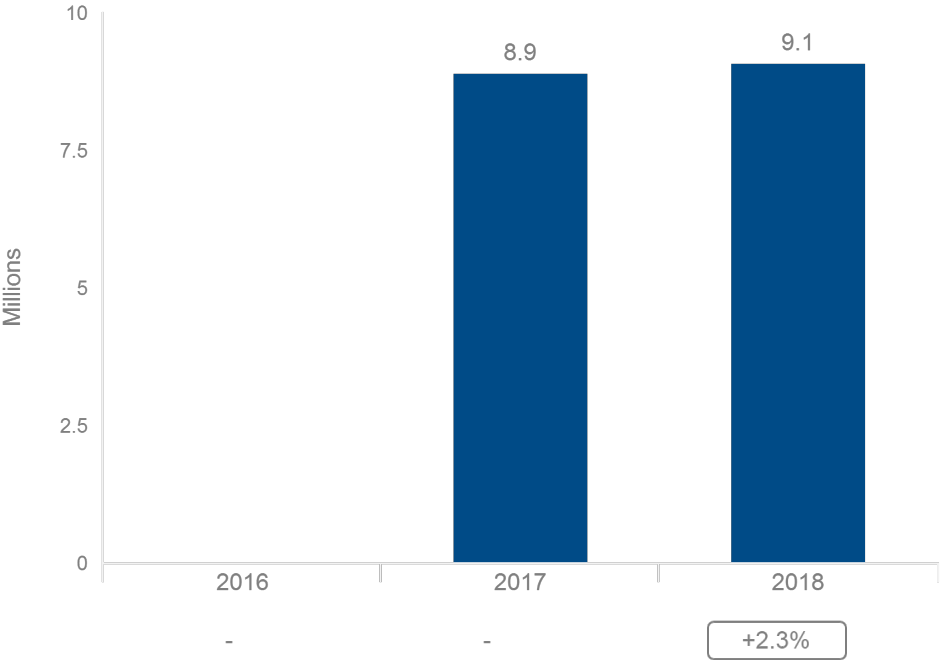
Total Size of U.S. Overnight Travel Market



2018 Overnight Trips



Overnight Trips to Louisville



Total Size of Louisville 2018 Domestic Travel Market

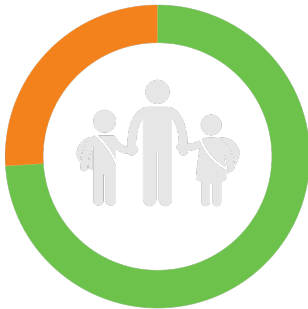
Total Person-Trips
25.4 Million
+2.7% vs. last year



- Day
64% | 16.2 Million
- Overnight
36% | 9.1 Million

Size of Louisville Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips
9.1 Million



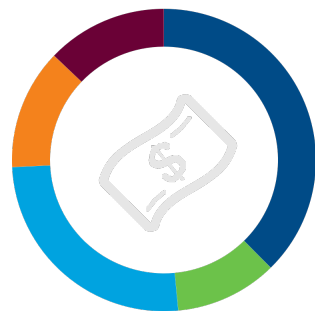
- Adults
74% | 6.7 Million
- Children
26% | 2.4 Million

Domestic Overnight Expenditures - by Sector

Total Spending

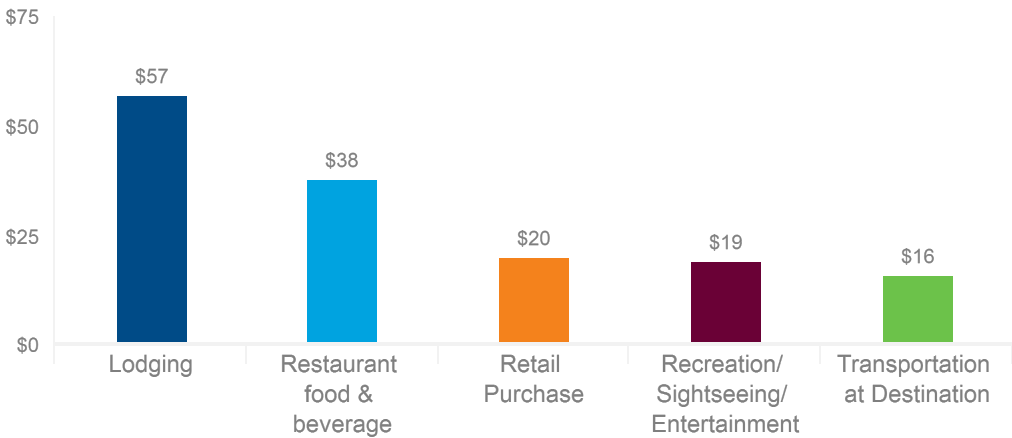
\$ 1.366 Billion

+4.5% vs. last year

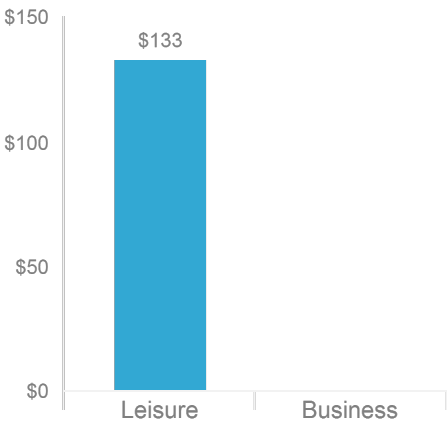


- Lodging
38% | \$518 Million
- Transportation at Destination
11% | \$147 Million
- Restaurant Food & Beverage
26% | \$349 Million
- Retail Purchase
13% | \$178 Million
- Recreation/Entertainment
13% | \$174 Million

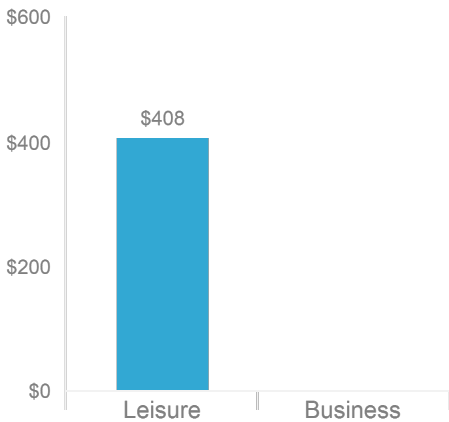
Average Per Person Expenditures on Domestic Overnight Trips - by Sector



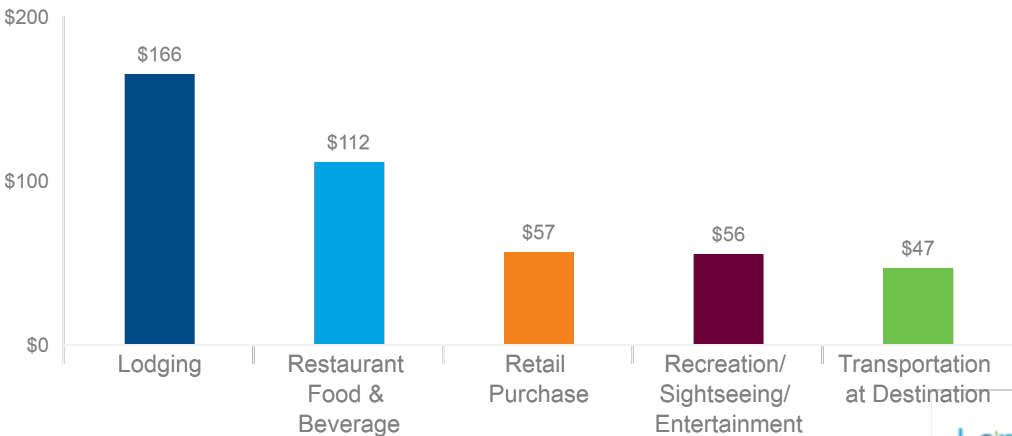
Average Per Person Expenditures on Domestic Overnight Trips - by Trip Purpose














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



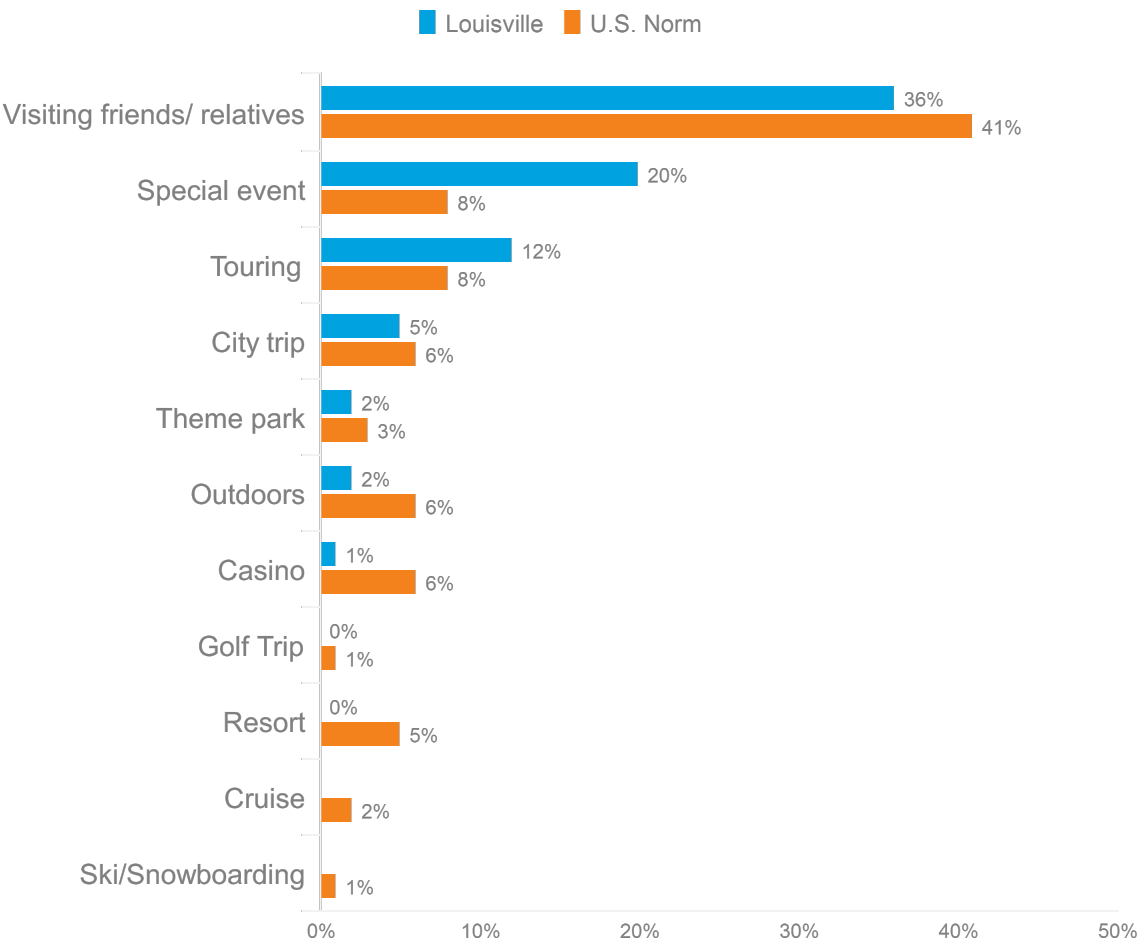
Average Per Party Expenditures on Domestic Overnight Trips - by Sector



Main Purpose of Trip

	36% Visiting friends/ relatives		8% Conference/ Convention
	20% Special event		
	12% Touring		
	5% City trip		
	2% Theme park		8% Other business trip
	2% Outdoors		
	1% Casino		4% Business-Leisure
	0% Golf Trip		

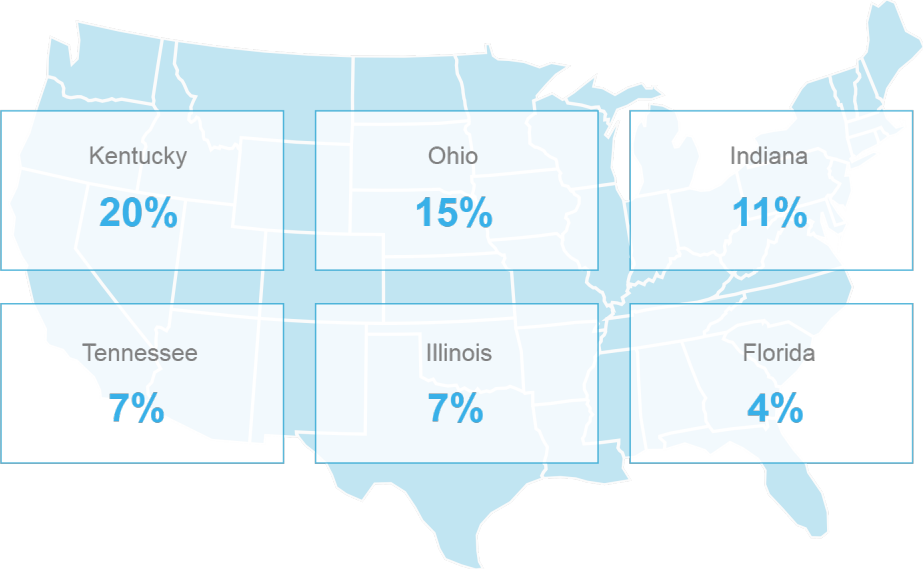
Main Purpose of Leisure Trip



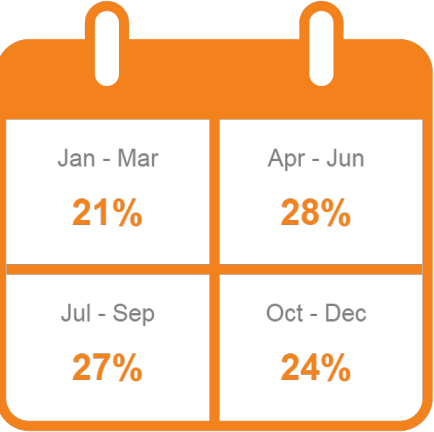
Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

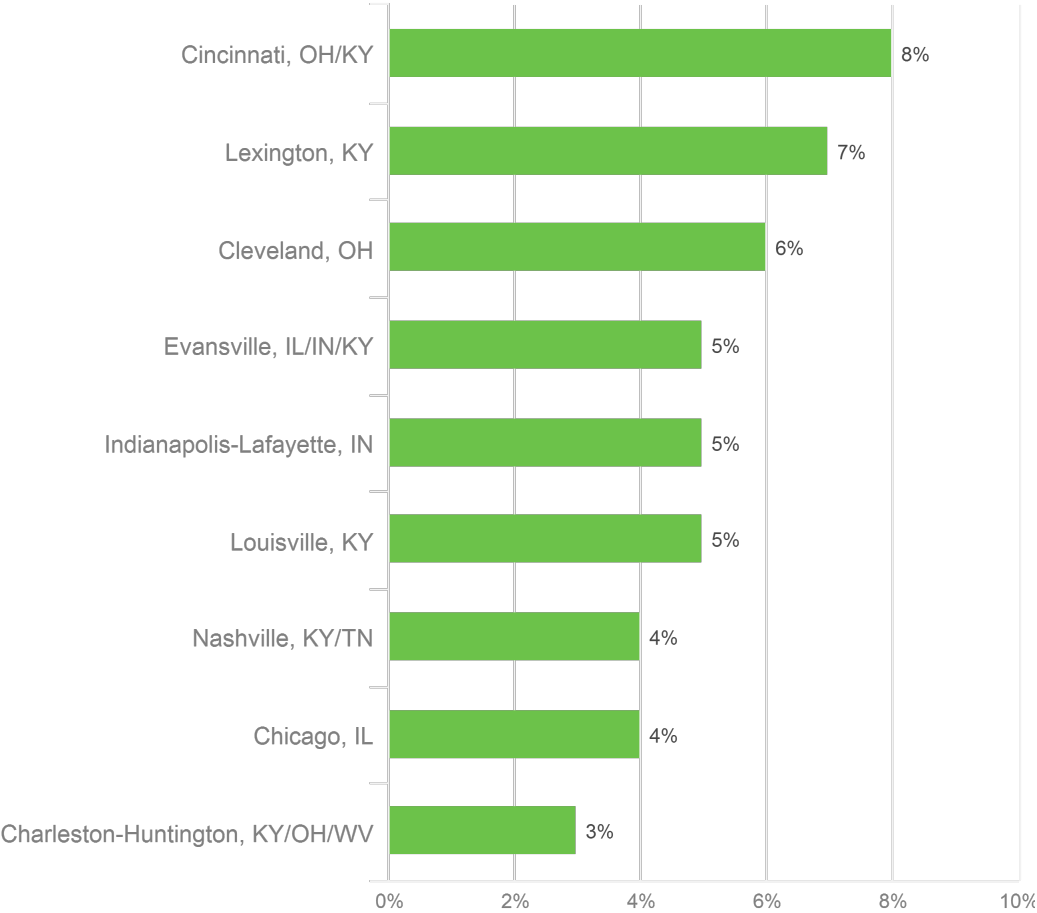
State Origin Of Trip



Season of Trip



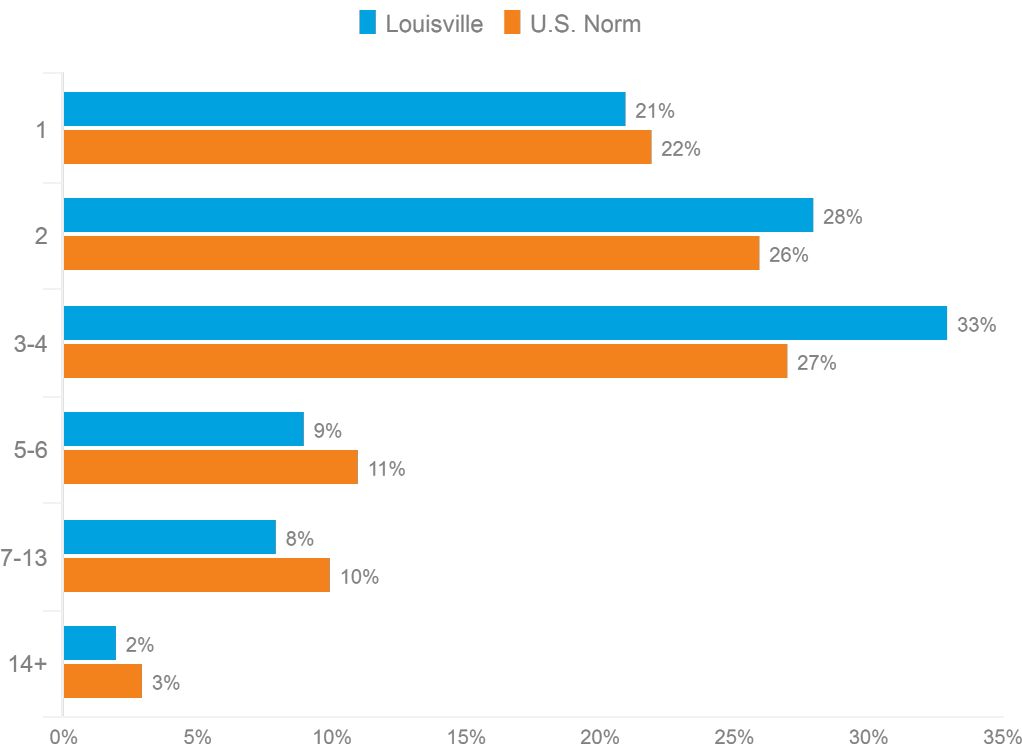
DMA Origin Of Trip



Louisville's Overnight Trip Characteristics

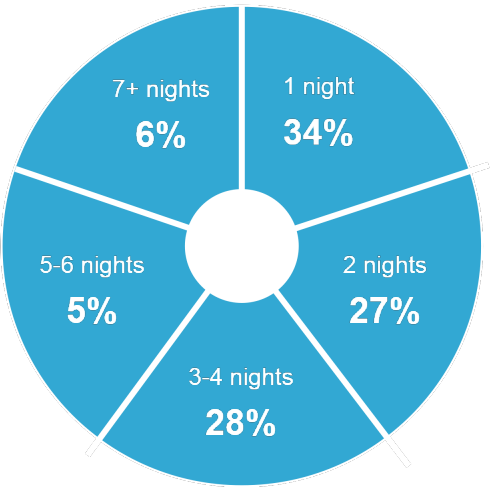
Base: 2018 Overnight Person-Trips

Total Nights Away on Trip



Louisville
3.4
Average Nights

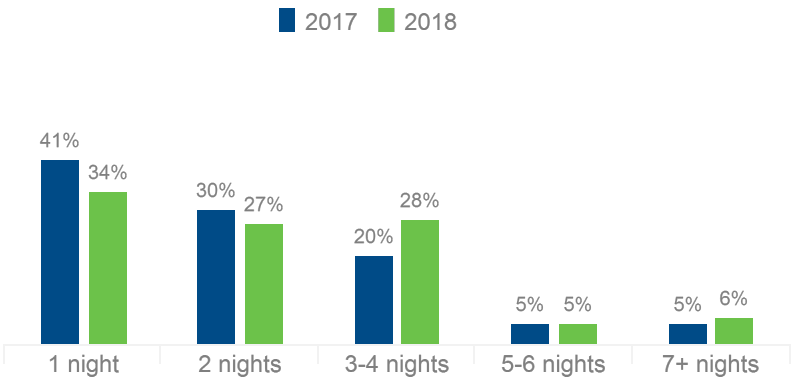
U.S. Norm
3.8
Average Nights



Nights Spent in Louisville

Average number of nights
2.8

Number of Nights Spent in Louisville - Trended



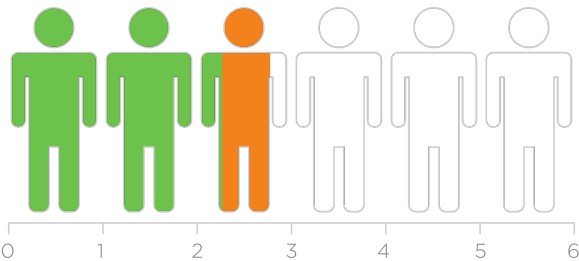
Average in 2018
2.8
Nights

Average last year
2.4
Nights

Size of Travel Party

Adults Children

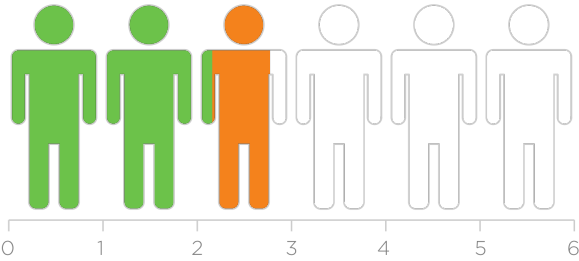
Louisville



Average number of people

Total
2.9

U.S. Norm

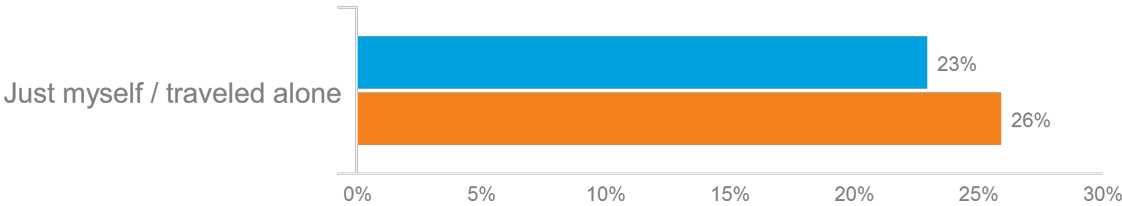


Average number of people

Total
2.8

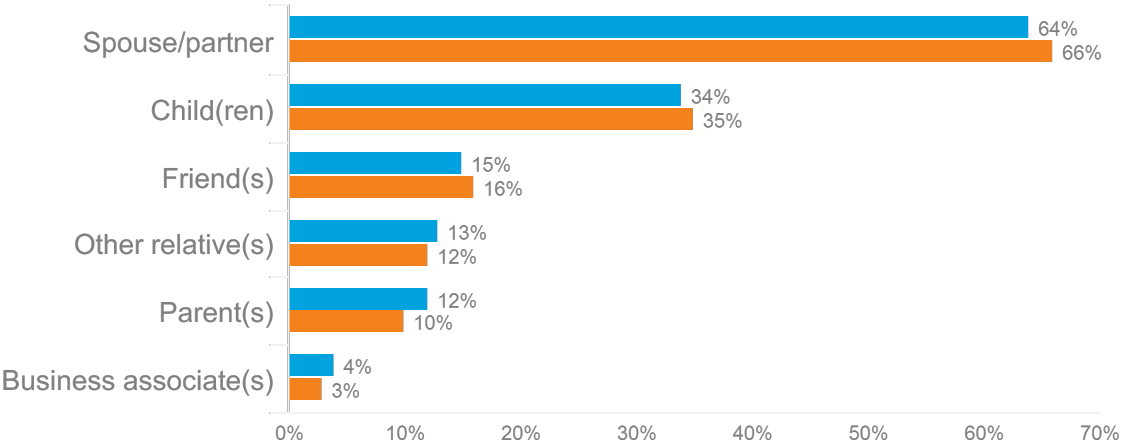
Percent Who Traveled Alone

Louisville U.S. Norm



Composition of Immediate Travel Party












Louisville U.S. Norm










Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

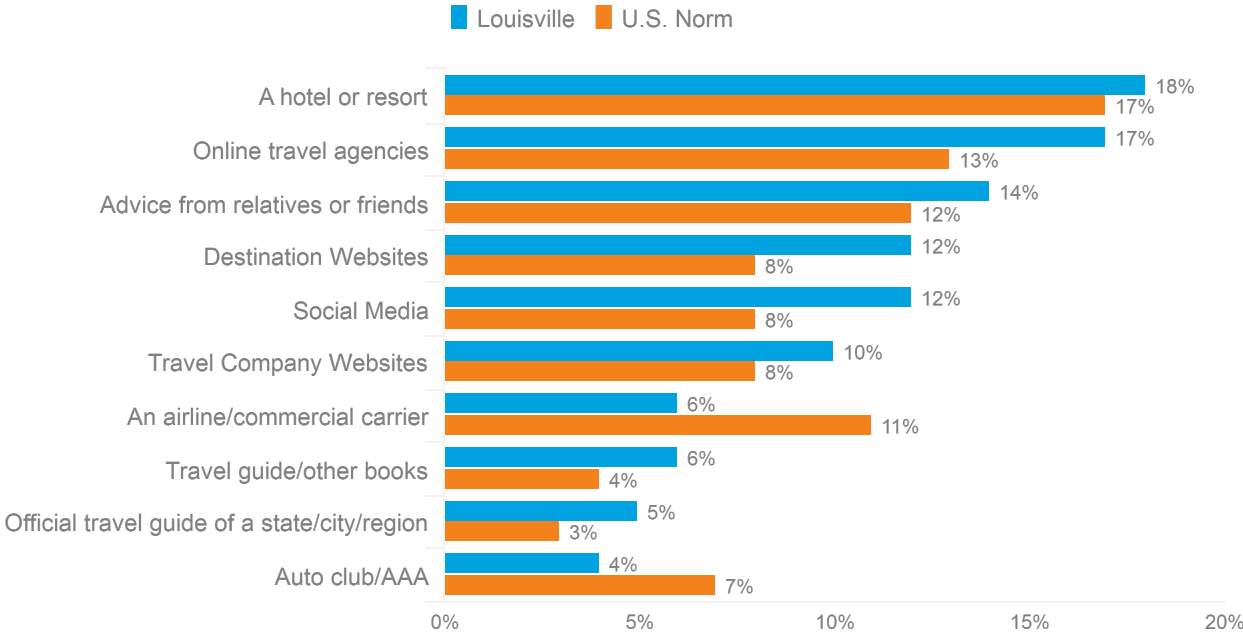
Transportation

			U.S. Norm
Own car/truck		80%	67%
Plane		16%	23%
Rental car		13%	18%
Online Taxi Service		10%	13%
Bus		4%	5%
Taxi Cab		1%	8%
Train		1%	5%
Ship/Boat		0%	2%
Bicycle		0%	1%
Camper, RV		0%	2%
Motorcycle		0%	1%






Accommodations

		Louisville	U.S. Norm
	Other hotel	45%	22%
	Home of friends or relatives	25%	24%
	Motel	16%	16%
	Resort hotel	10%	24%
	Rented home / condo / apartment	4%	5%
	Bed & breakfast	3%	4%
	Other	3%	5%

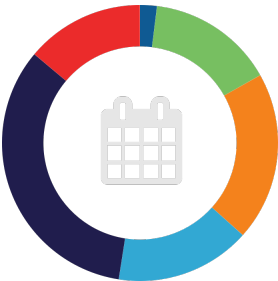
Trip Planning Information Sources



Devices Used for Trip Planning







	Louisville	U.S. Norm
 Any device	84%	84%
 Laptop	47%	43%
 Smartphone	38%	33%
 Desktop/Home computer	35%	40%
 Tablet	15%	17%

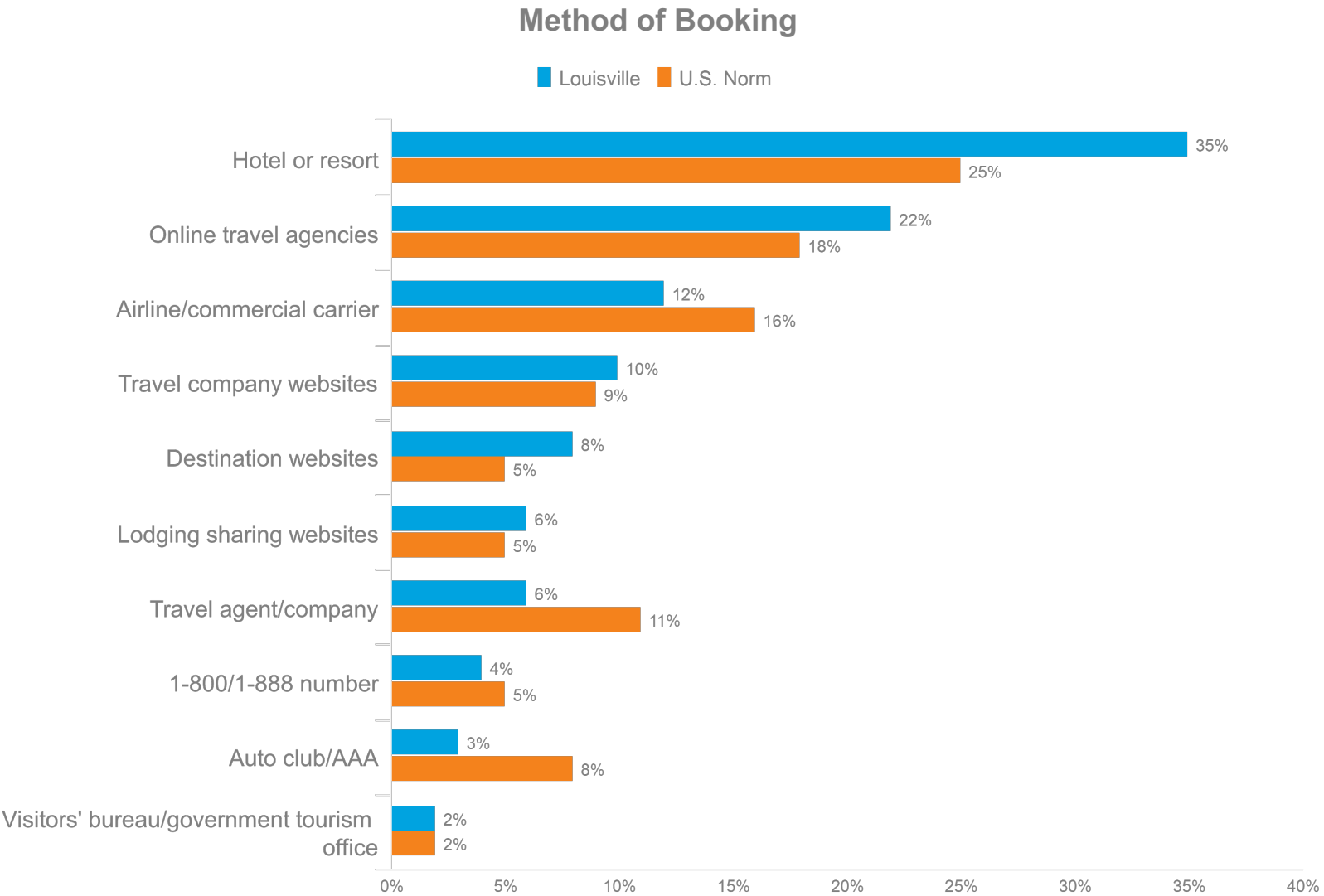
Length of Trip Planning



Louisville	
 More than 1 year in advance	2%
 6-12 months	15%
 3-5 months	20%
 2 months	16%
 1 month or less	34%
 Did not plan anything in advance	14%



U.S. Norm	
 More than 1 year in advance	4%
 6-12 months	14%
 3-5 months	17%
 2 months	16%
 1 month or less	33%
 Did not plan anything in advance	14%



Activities and Experiences (Top 10)

Shopping



30%

U.S. Norm
30%

Landmark/historic site



23%

U.S. Norm
12%

Bar/nightclub



17%

U.S. Norm
15%

Museum



15%

U.S. Norm
10%

Fine/upscale dining



14%

U.S. Norm
12%

Brewery



13%

U.S. Norm
6%

Fair/exhibition/festival



9%

U.S. Norm
4%

National/state park



9%

U.S. Norm
10%

Business Meeting



7%

U.S. Norm
5%

Attended Professional /
college sports event

7%

U.S. Norm
3%

Activities of Special Interest (Top 5)

Louisville






Historic places	29%
Cultural activities/Attractions	17%
Exceptional Culinary Experiences	12%
Brewery Tours/Beer Tasting	11%
Winery Tours/Tasting	7%

Activities of Special Interest (Top 5)





U.S. Norm

Historic places	22%
Cultural activities/Attractions	17%
Exceptional Culinary Experiences	12%
Brewery Tours/Beer Tasting	7%
Winery Tours/Tasting	6%




















Online Social Media Use by Travelers

	Louisville	U.S. Norm
 Used any social media	66%	66%
 Posted travel photos or video online	40%	29%
 Read travel reviews	21%	26%
 Looked at travel-related photos or video online	20%	23%
 Accessed travel deals, news, events, or promotions	17%	20%

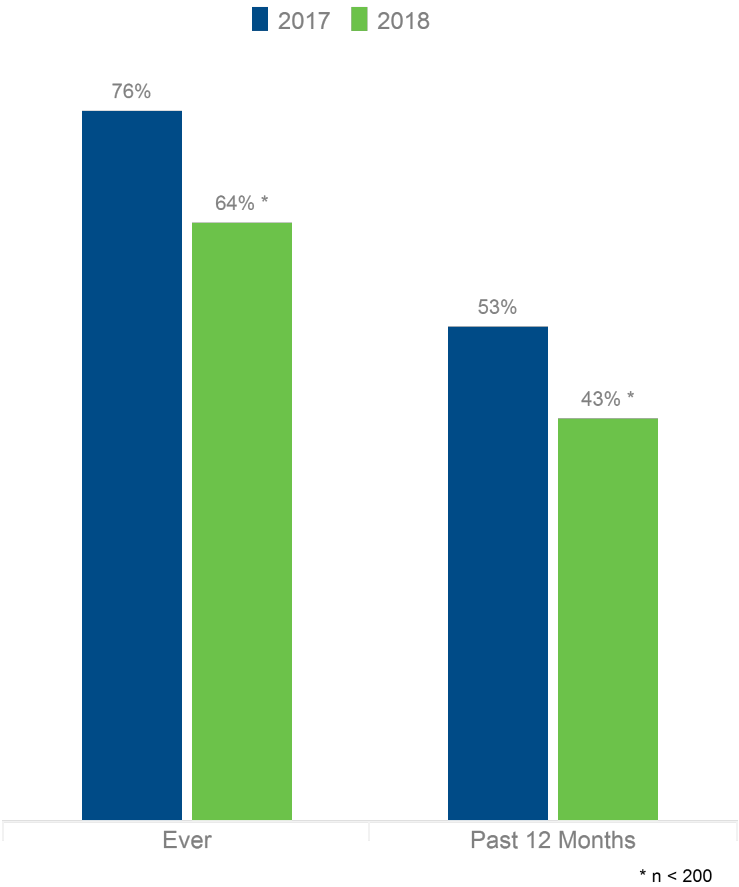
Devices Using During Trip

	Louisville	U.S. Norm
 Any device	88%	83%
 Smartphone	79%	68%
 Laptop	31%	31%
 Tablet	27%	26%

% Very Satisfied with Trip

	Overall trip experience		66%
	Quality of food		59%
	Sightseeing and attractions		58%
	Friendliness of people		58%
 	Safety and Security		55%
	Cleanliness		52%
	Quality of accommodations		52%
	Value for money		44%
	Music/nightlife/entertainment		40%

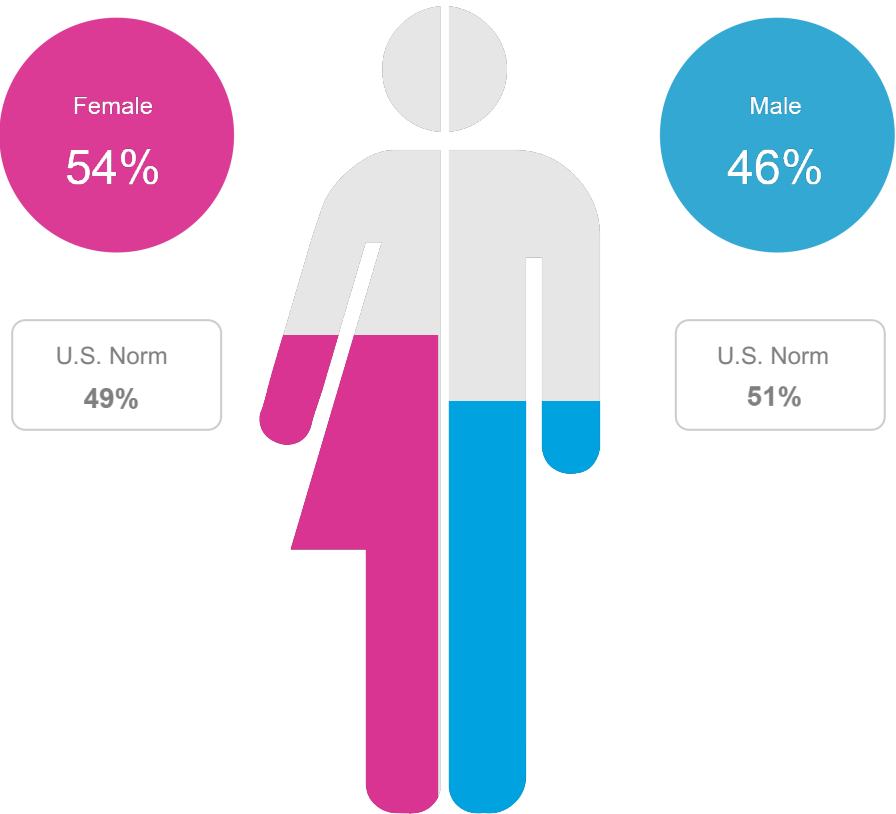
Past Visitation to Louisville



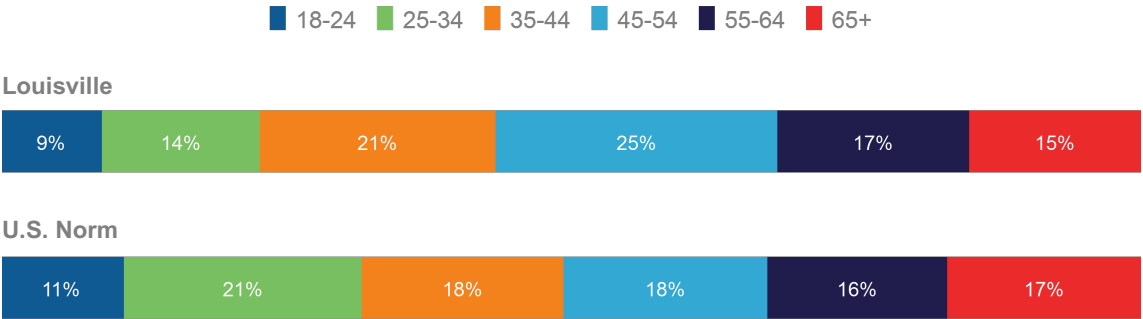
Demographic Profile of Overnight Louisville Visitors

Base: 2018 Overnight Person-Trips

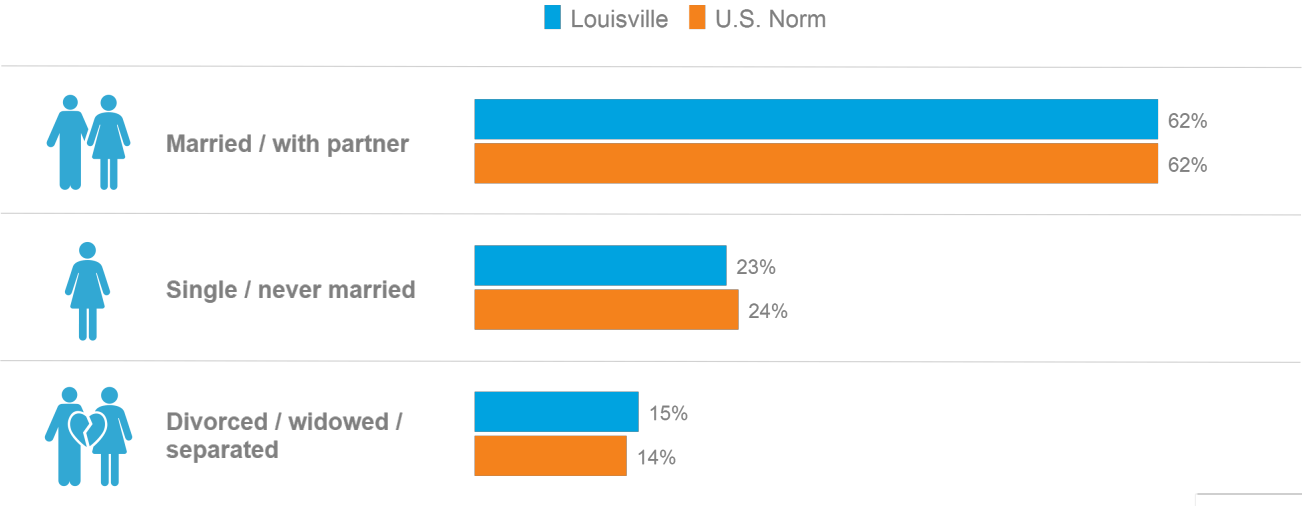
Gender



Age



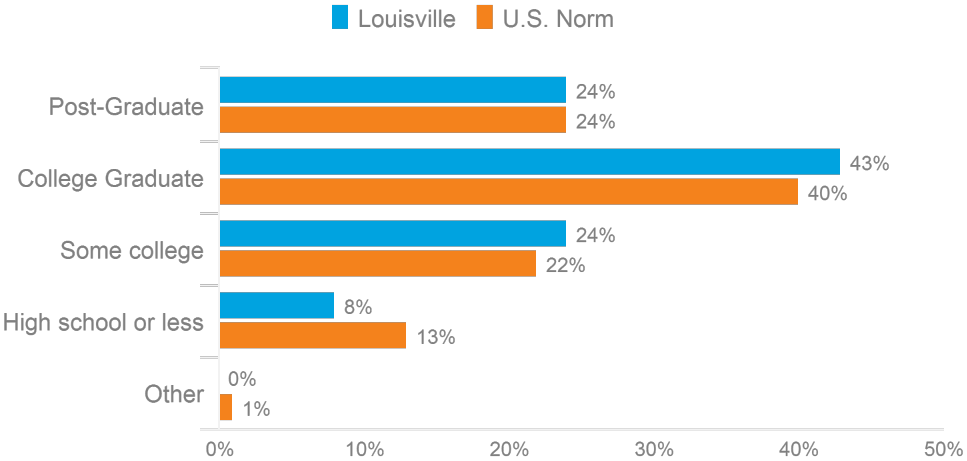
Marital Status



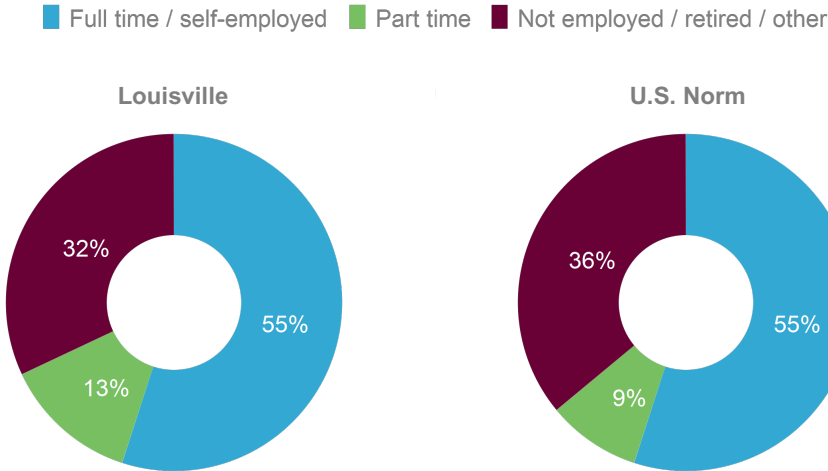
Demographic Profile of Overnight Louisville Visitors

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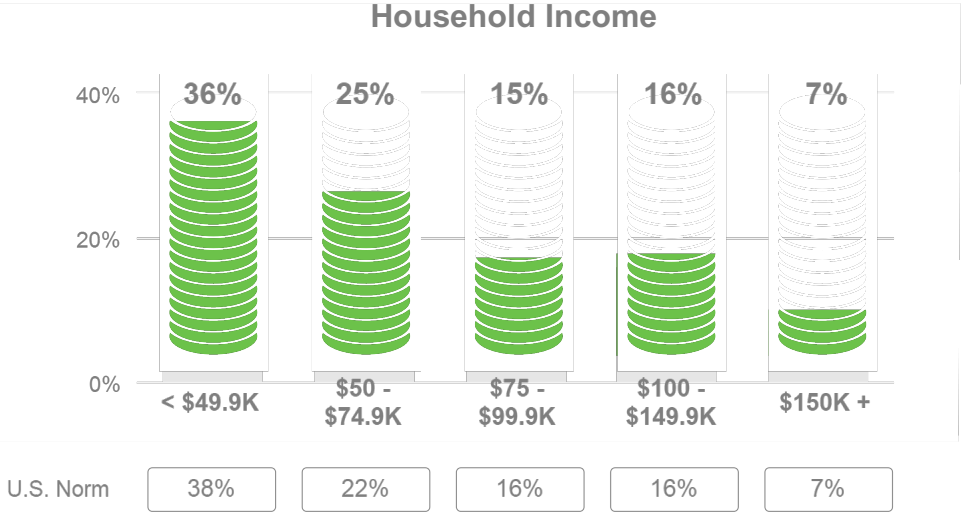
Education



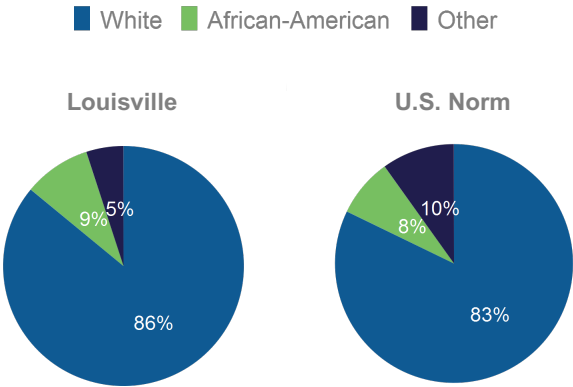
Employment



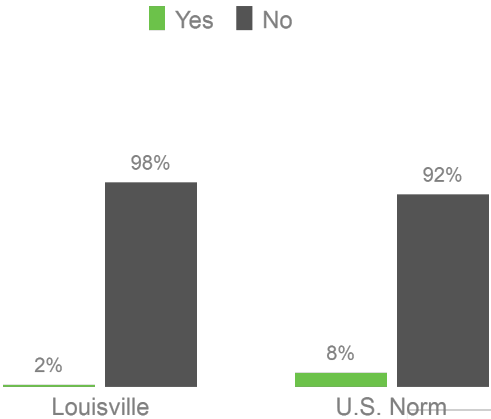
Household Income



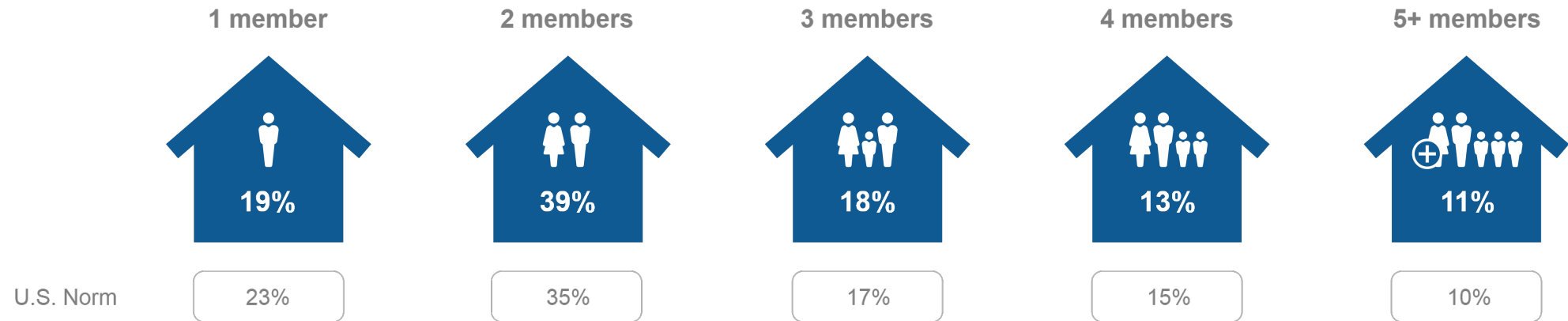
Race



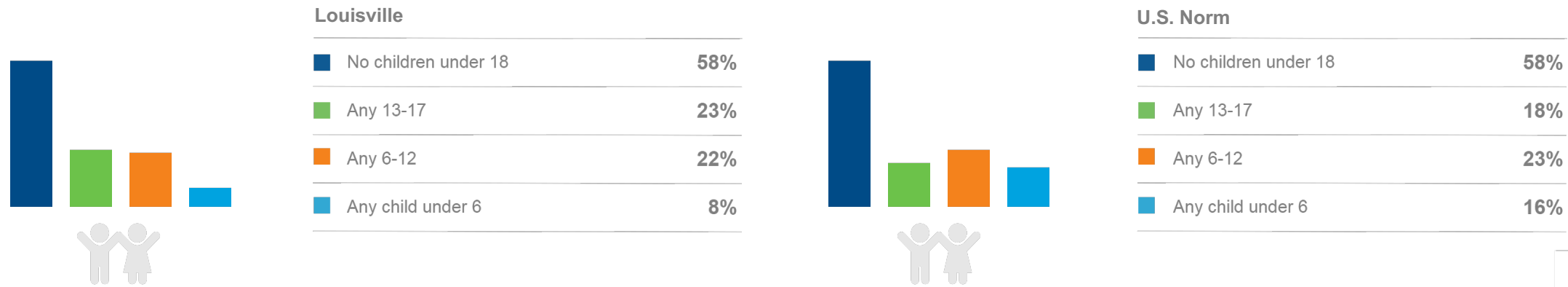
Hispanic Background



Household Size



Children in Household





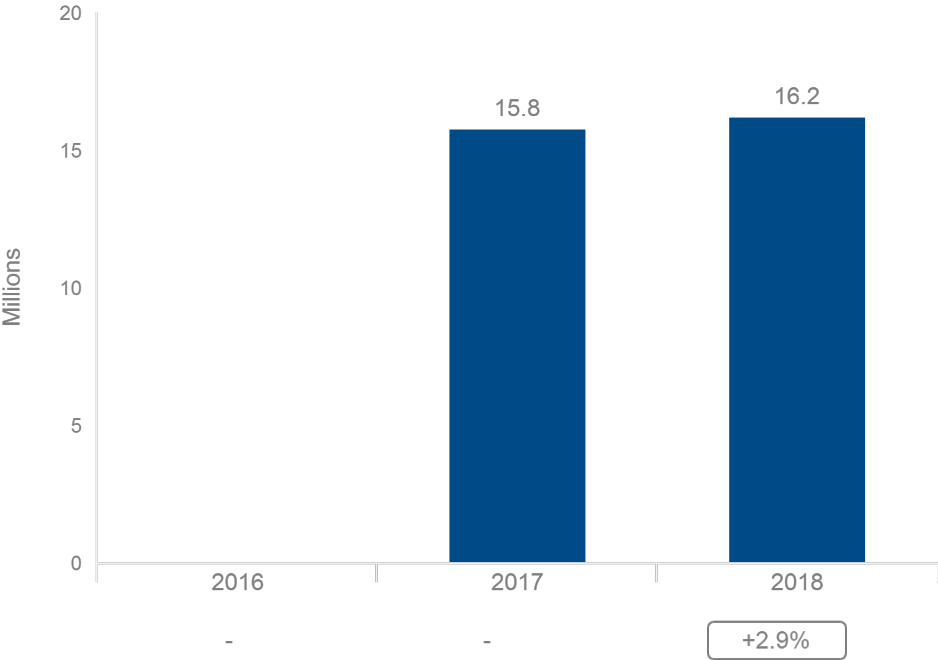
Louisville Day Visitor Research

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Day Trips to Louisville



Total Size of Louisville 2018 Domestic Travel Market

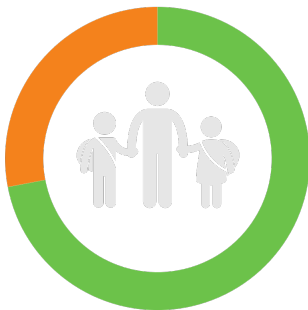
Total Person-Trips
25.4 Million
+2.7% vs. last year



- Day
64% | 16.2 Million
- Overnight
36% | 9.1 Million

Size of Louisville Day Travel Market - Adults vs. Children

Total Day Person-Trips
16.2 Million



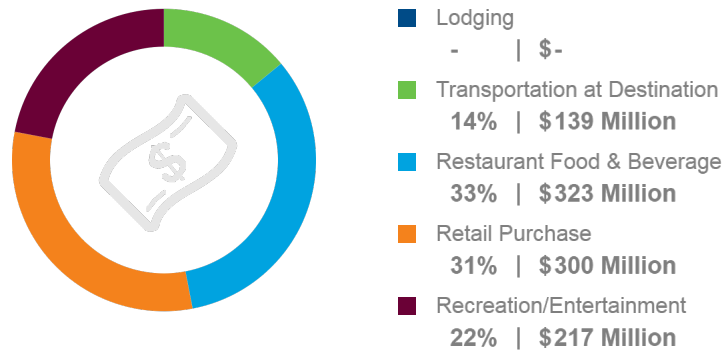
- Adults
72% | 11.7 Million
- Children
28% | 4.5 Million

Domestic Day Expenditures - by Sector

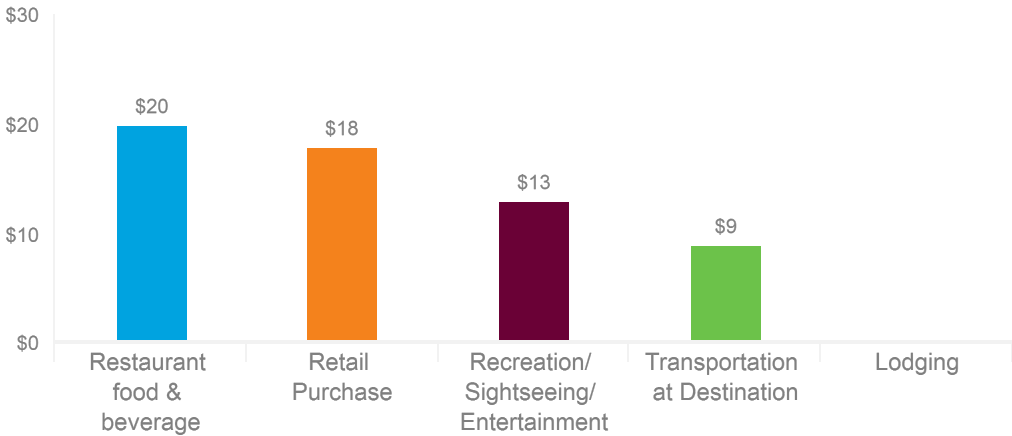
Total Spending

\$ 0.980 Billion

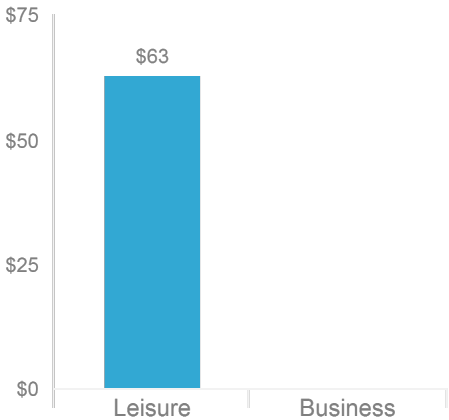
+3.9% vs. last year



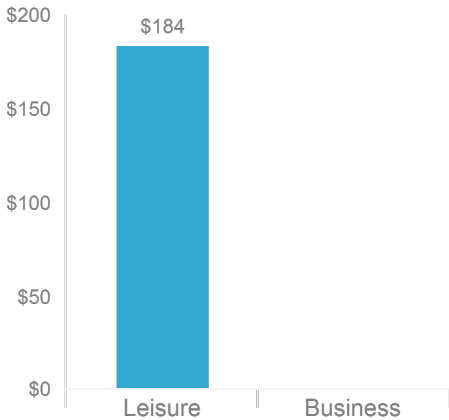
Average Per Person Expenditures on Domestic Day Trips - by Sector



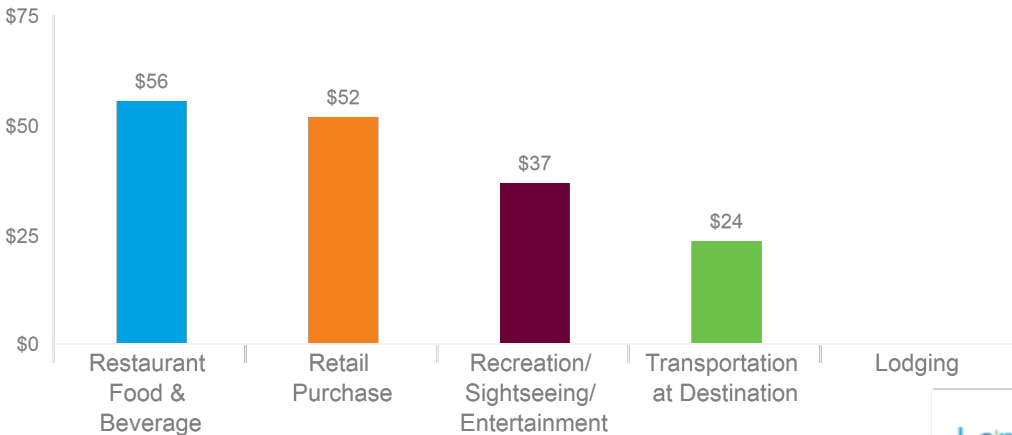
Average Per Person Expenditures on Domestic Day Trips - by Trip Purpose



Average Per Party Expenditures on Domestic Day Trips - by Trip Purpose



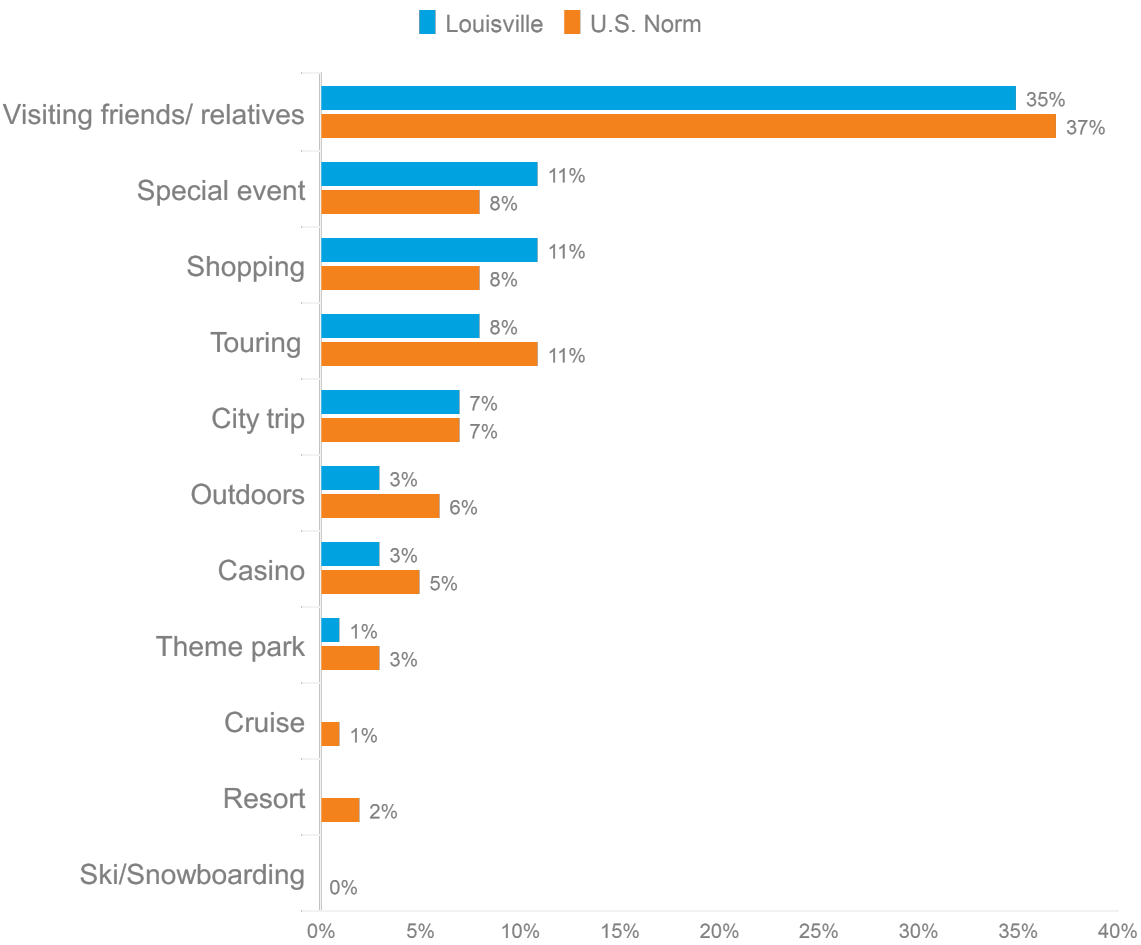
Average Per Party Expenditures on Domestic Day Trips - by Sector



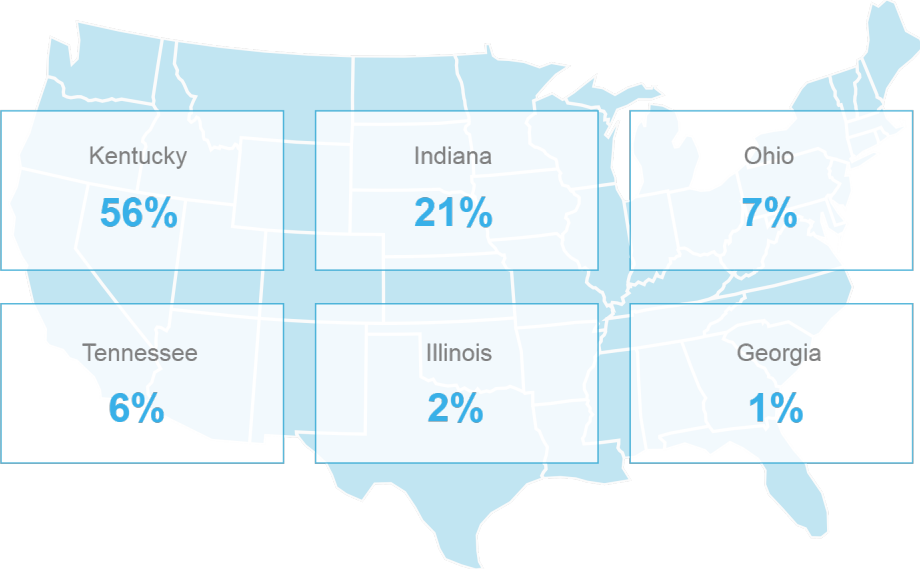
Main Purpose of Trip

	35% Visiting friends/ relatives		3% Conference/ Convention
	11% Special event		
	11% Shopping		
	8% Touring		
	7% City trip		13% Other business trip
	3% Outdoors		
	3% Casino		
	1% Theme park		3% Business-Leisure

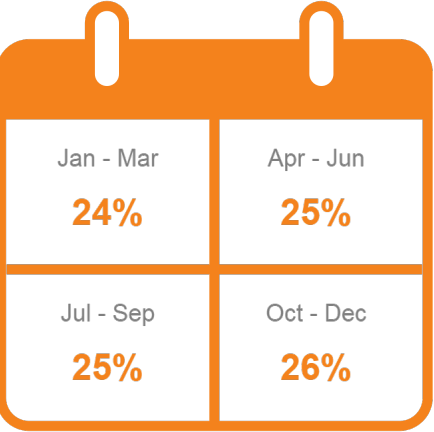
Main Purpose of Leisure Trip



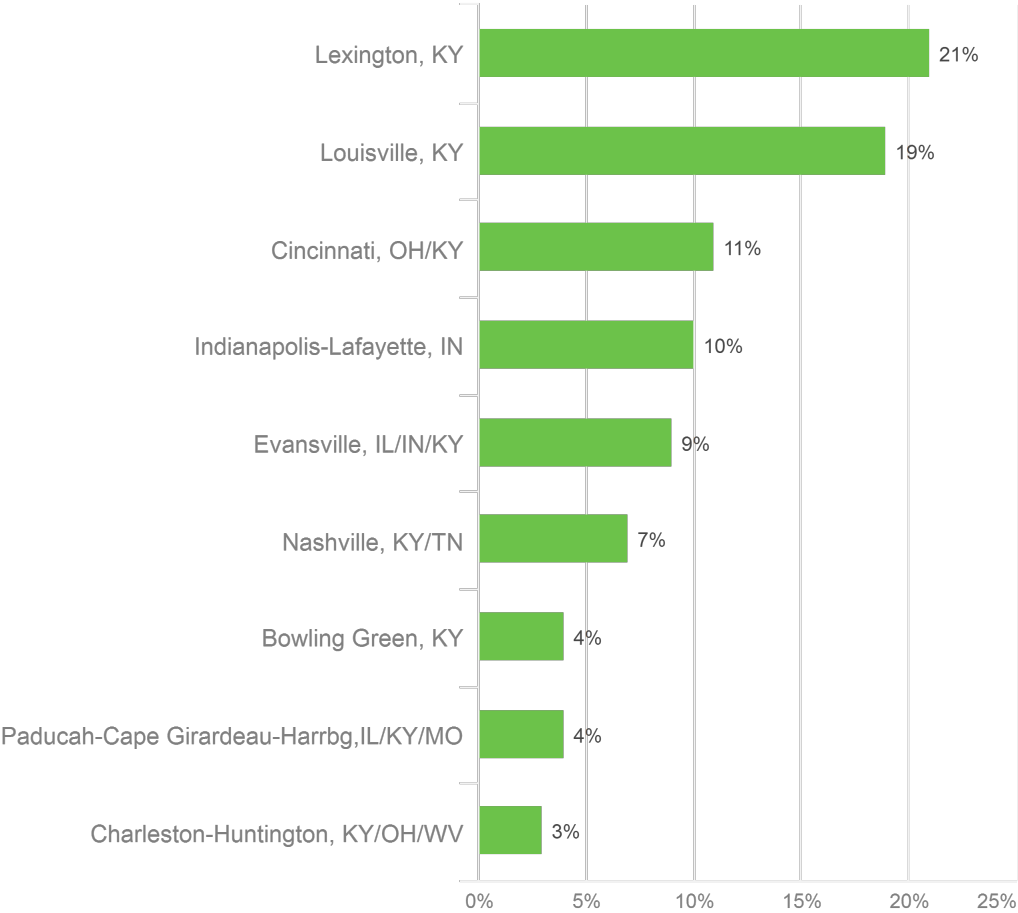
State Origin Of Trip



Season of Trip

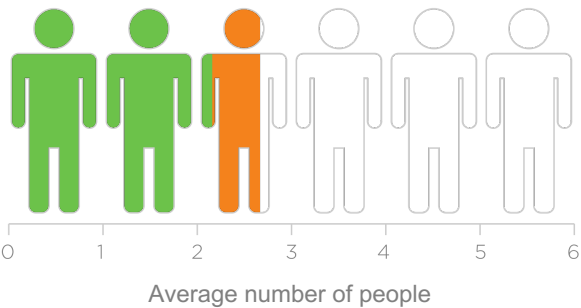


DMA Origin Of Trip

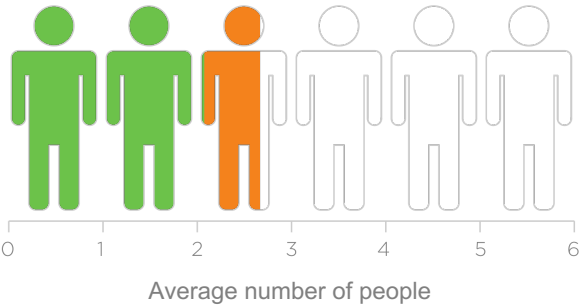


Size of Travel Party

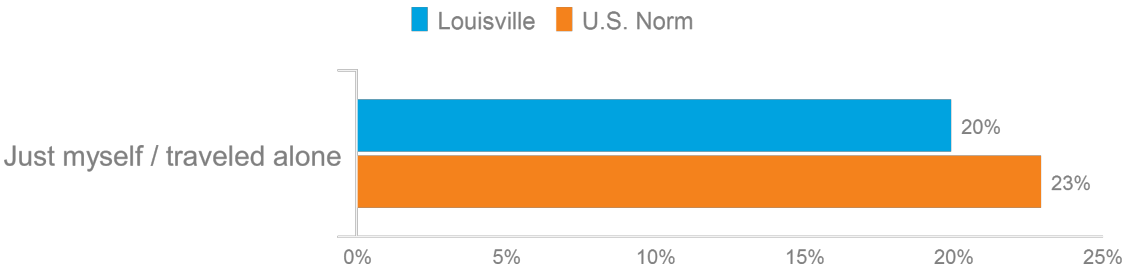
Louisville



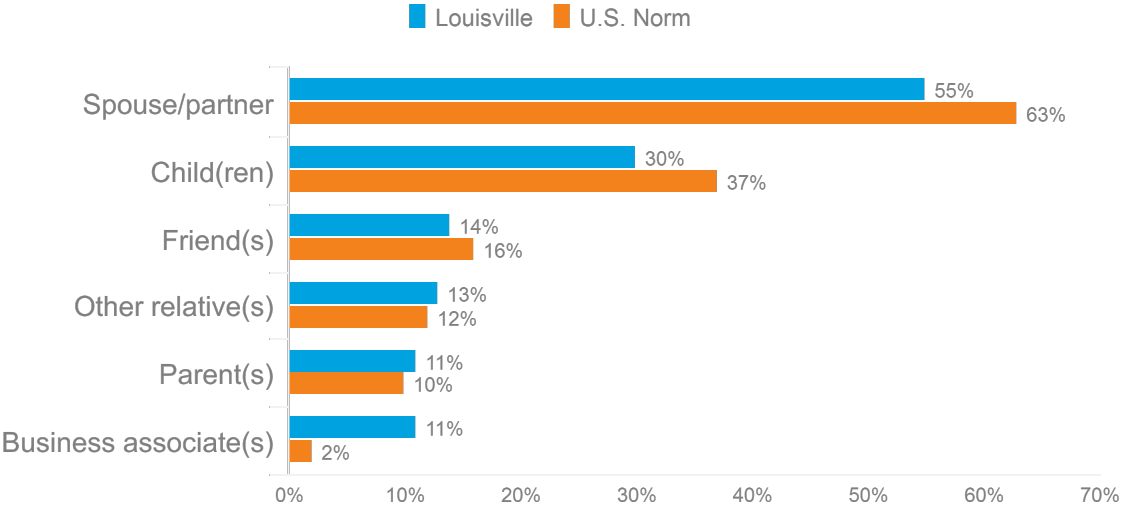
U.S. Norm



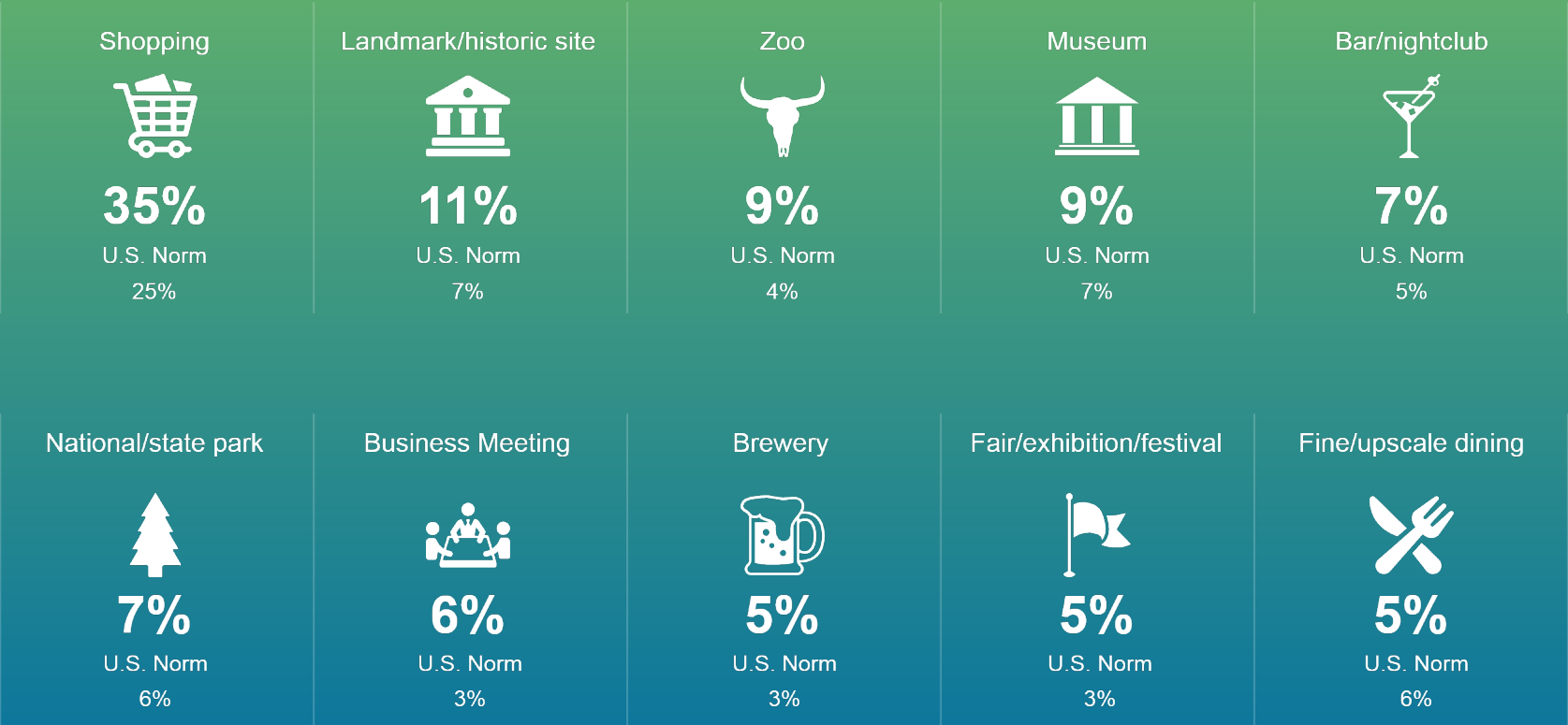
Percent Who Traveled Alone



Composition of Immediate Travel Party



Activities and Experiences (Top 10)



Activities of Special Interest (Top 5)

Louisville






Historic places	17%
Cultural activities/Attractions	12%
Exceptional Culinary Experiences	8%
Brewery Tours/Beer Tasting	8%
Winery Tours/Tasting	6%

Activities of Special Interest (Top 5)

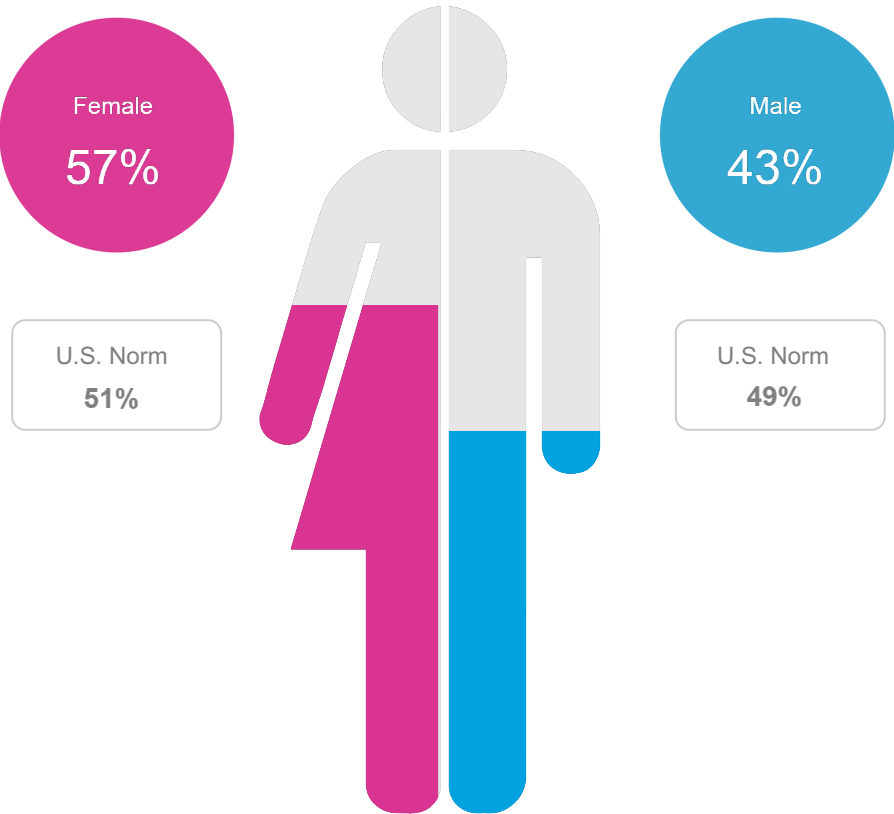
U.S. Norm

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Cultural activities/Attractions	13%
Exceptional Culinary Experiences	8%
Brewery Tours/Beer Tasting	5%
Winery Tours/Tasting	5%

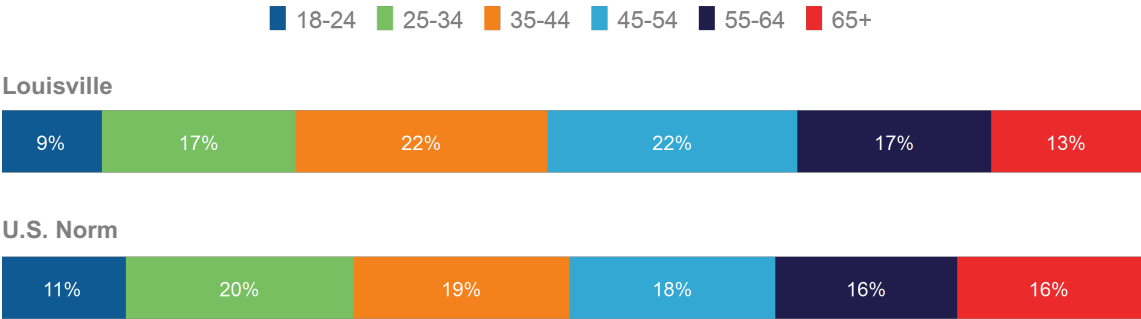
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 Looked at travel-related photos or video online	34%	24%
 Read travel reviews	30%	25%
 Accessed travel deals, news, events, or promotions	25%	21%

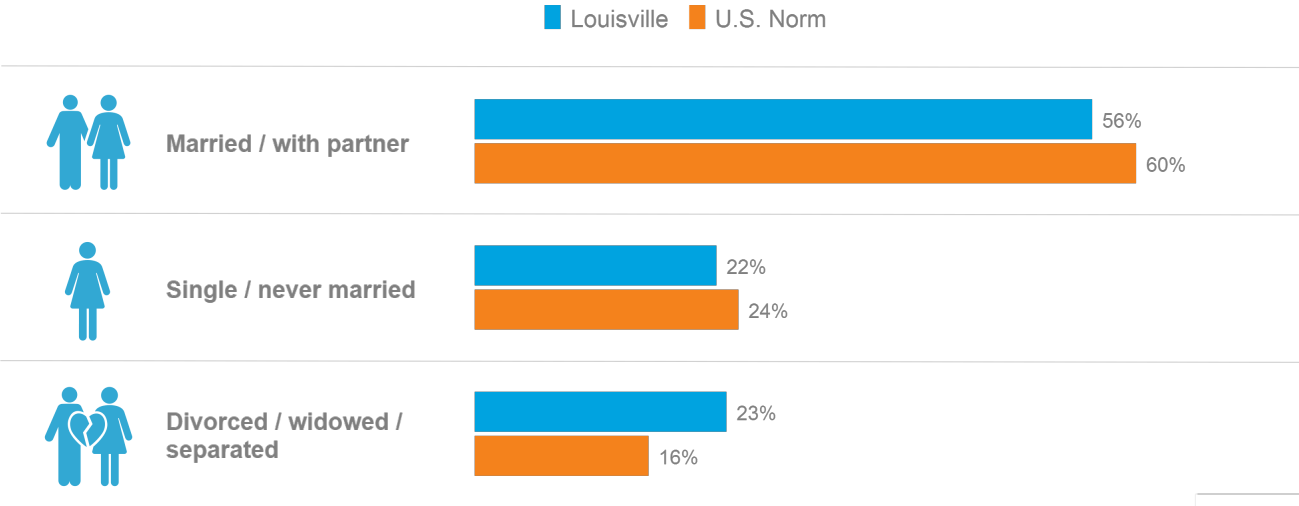
Gender



Age



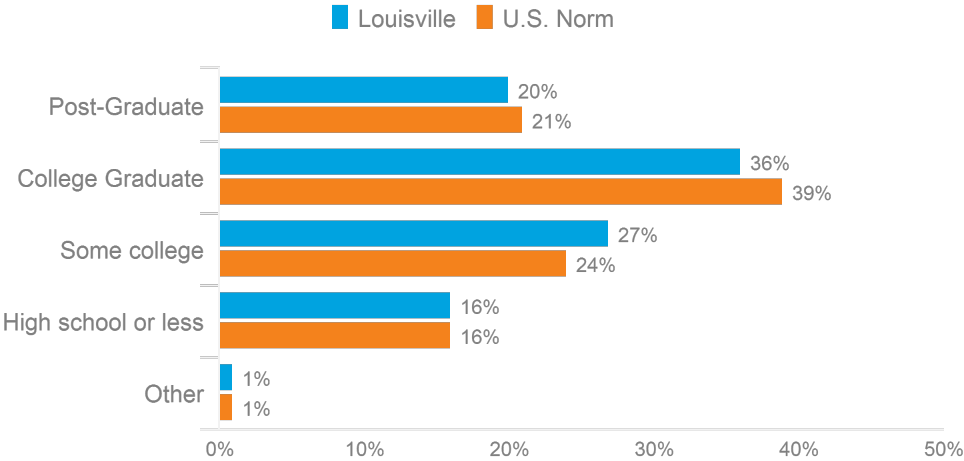
Marital Status



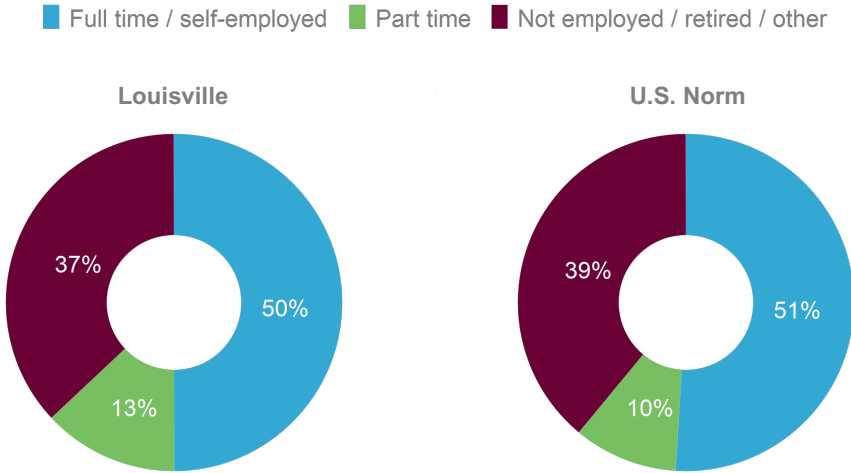
Demographic Profile of Day Louisville Visitors

Base: 2018 Day Person-Trips

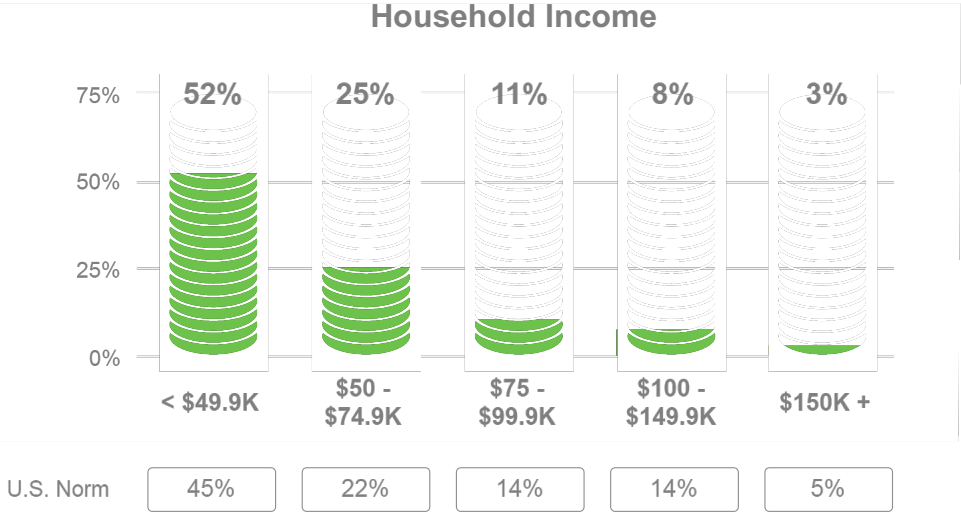
Education



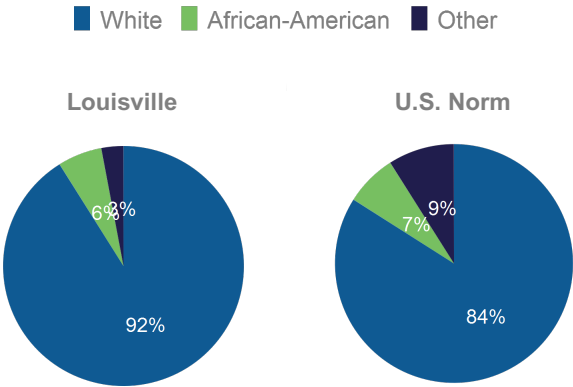
Employment



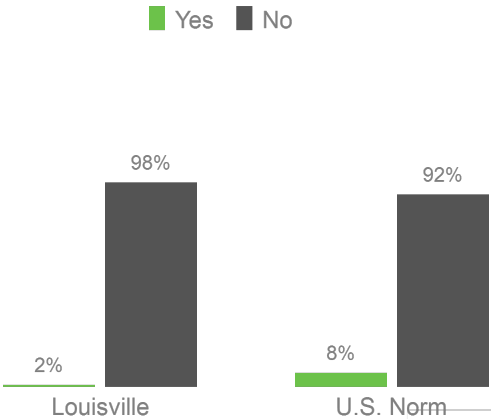
Household Income



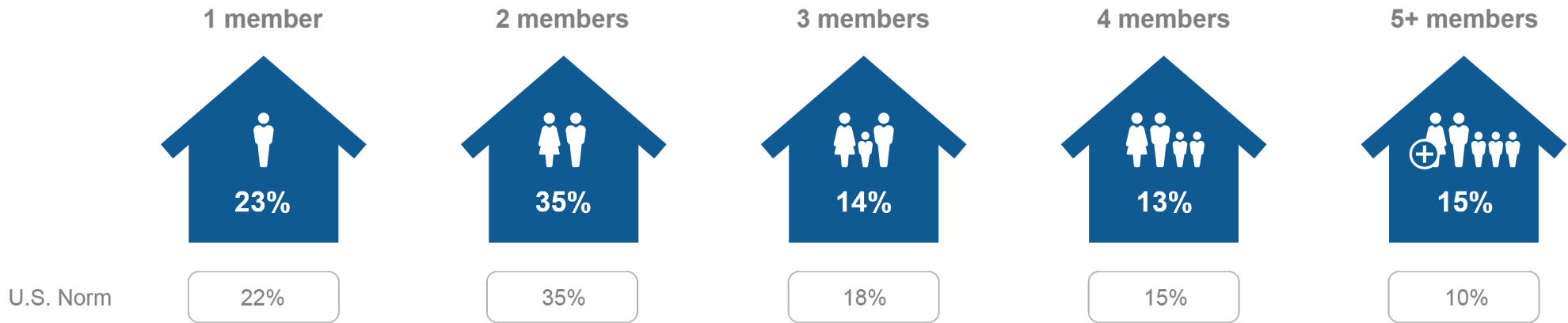
Race



Hispanic Background



Household Size



Children in Household

