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

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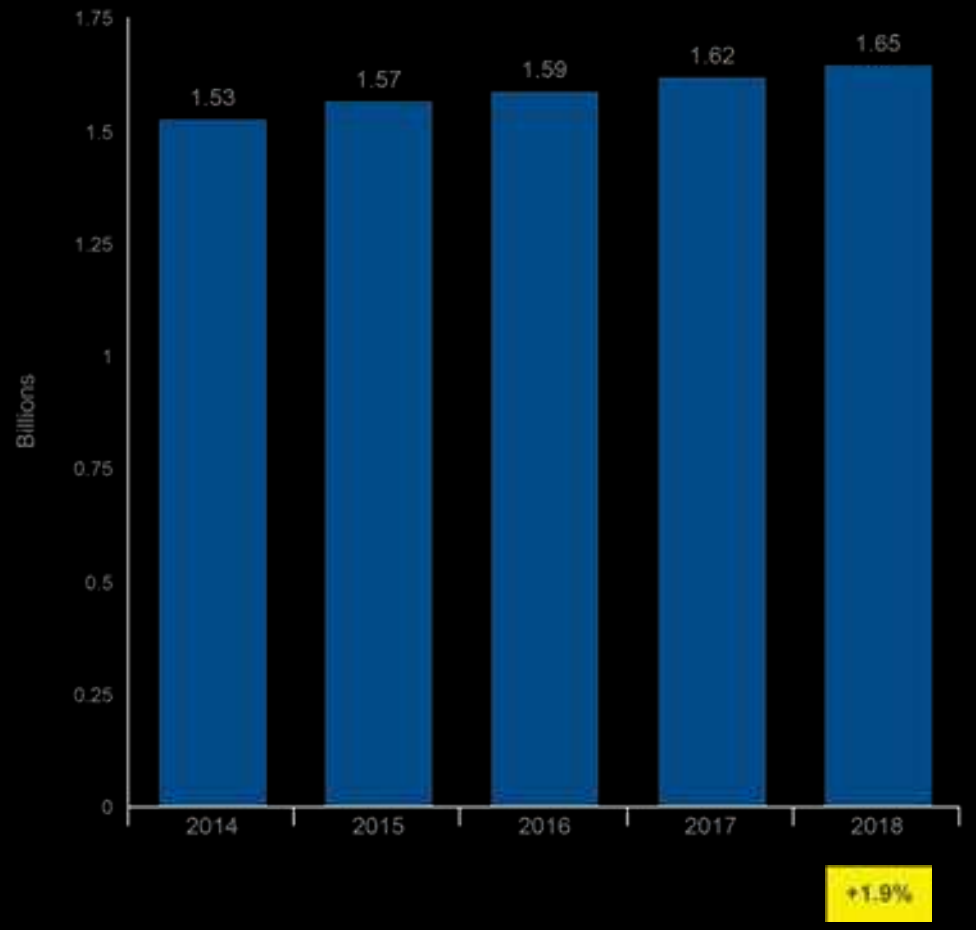
Size and Structure of the U.S. Overnight Travel Market

Base: 2018 Overnight Person-Trips

Total Size of U.S. Overnight Travel Market

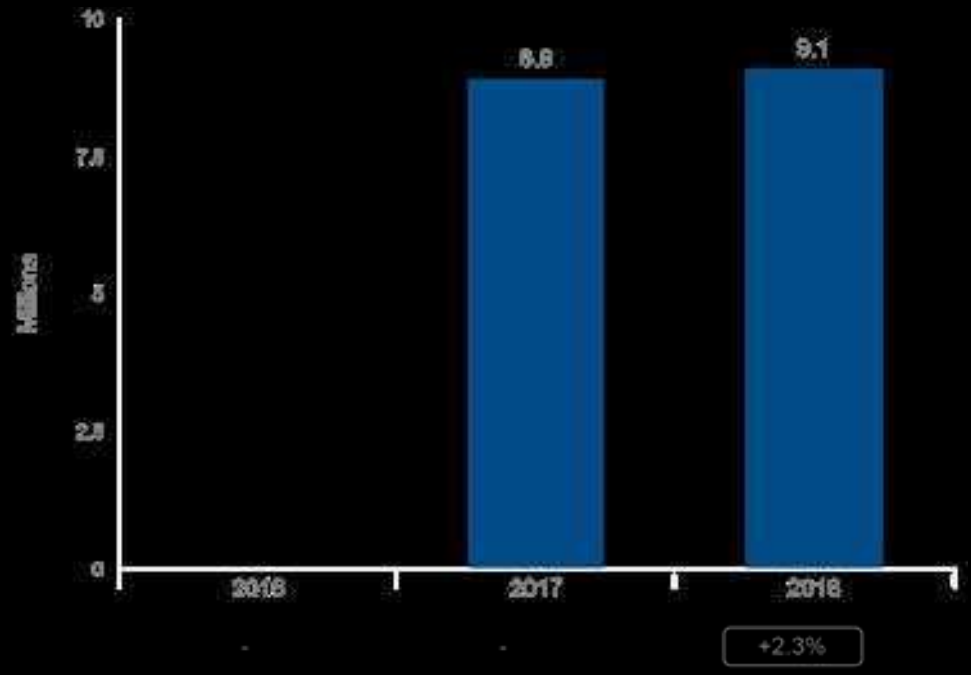


2018 Overnight Trips

Size and Structure of Louisville's Domestic Travel Market

Base: 2018 Overnight Person-Trips

Overnight Trips to Louisville



Total Size of Louisville 2018 Domestic Travel Market

Total Person-Trips

25.4 Million

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

Louisville's Overnight Trip Expenditures

Base: 2018 Overnight Person-Trips

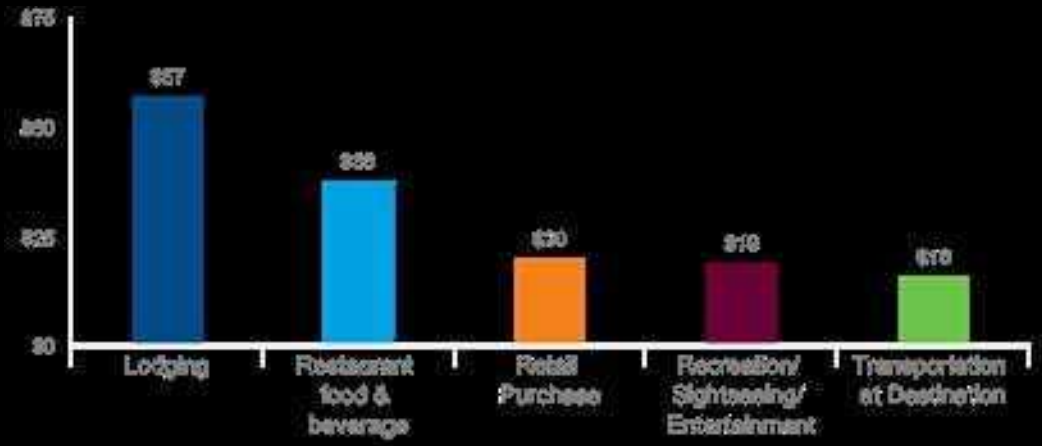
Domestic Overnight Expenditures - by Sector

Total Spending

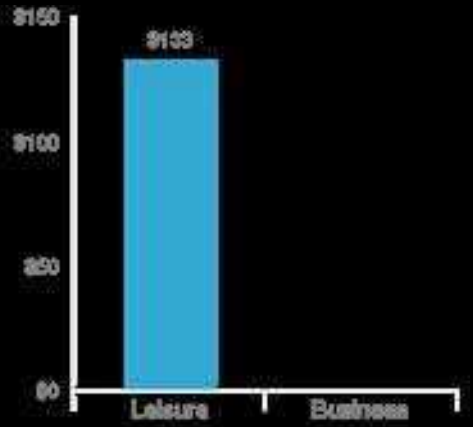
$ 1.366 Billion

38%	$518 Million
11%	$147 Million
26%	$349 Million
13%	$178 Million
13%	$174 Million

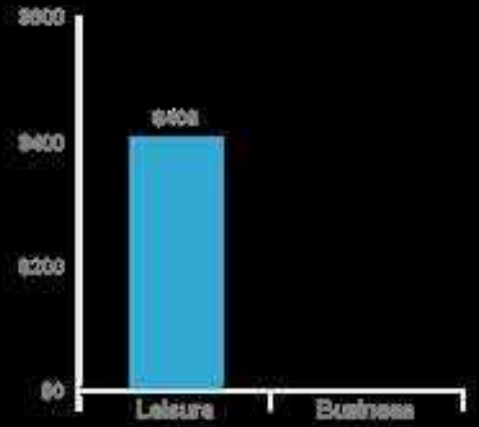
Average Per Person Expenditures on Domestic Overnight Trips - by Sector



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



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

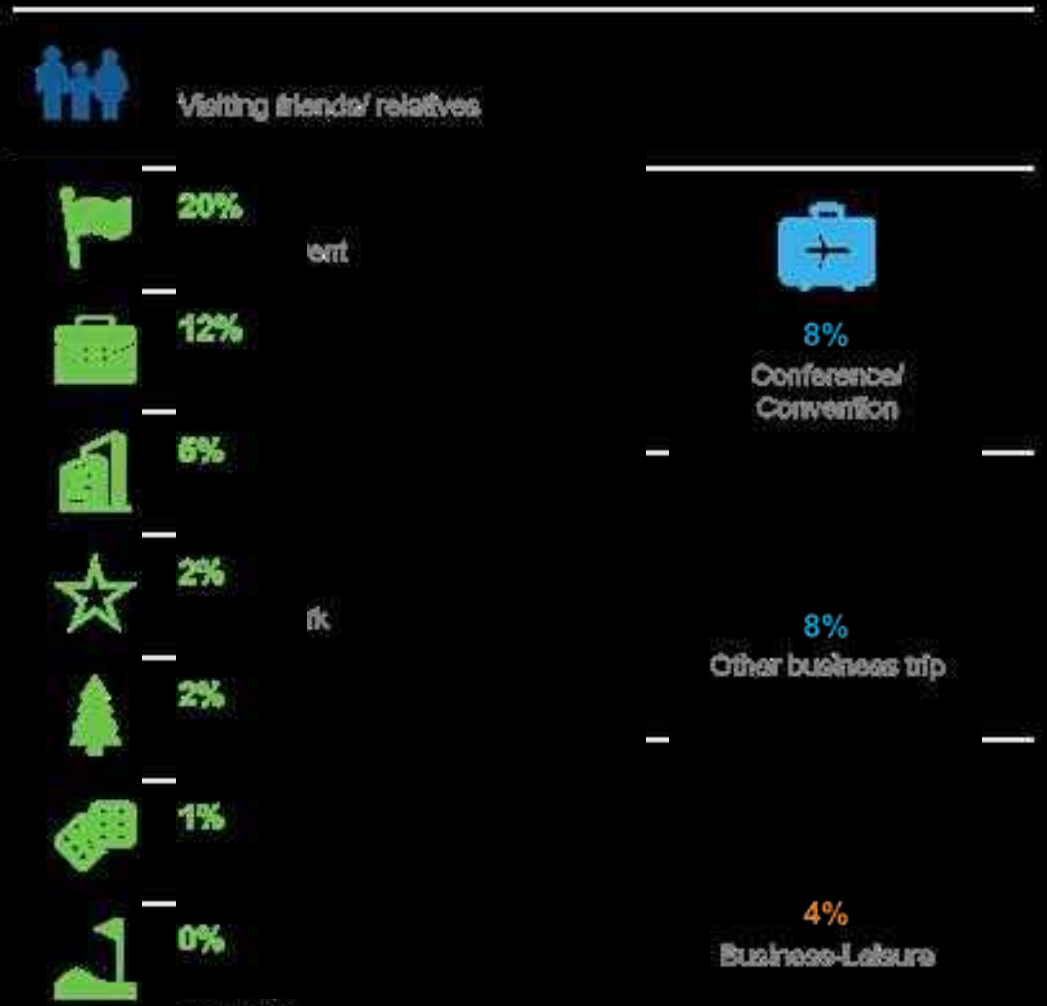


Average Per Party Expenditures on Domestic Overnight Trips - by Sector

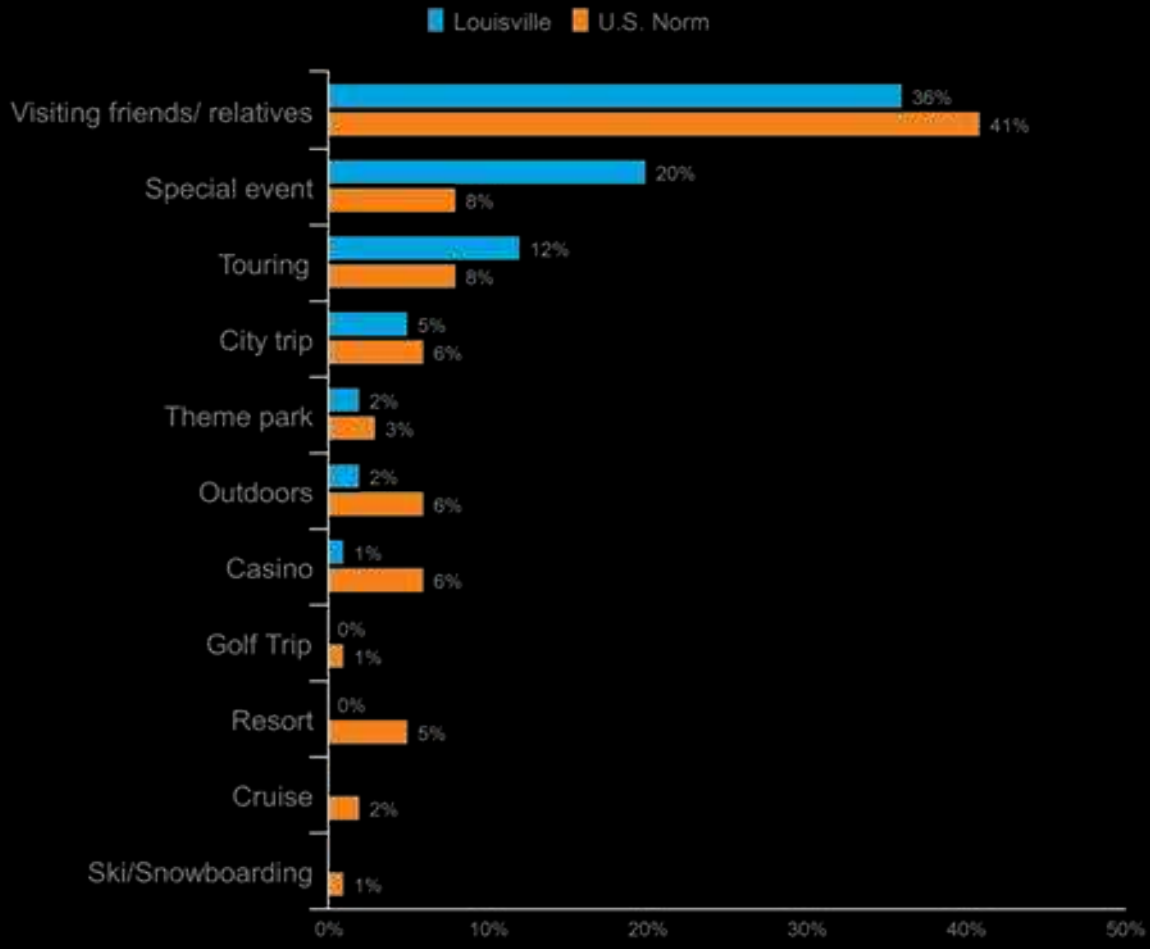
Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

Main Purpose of Trip



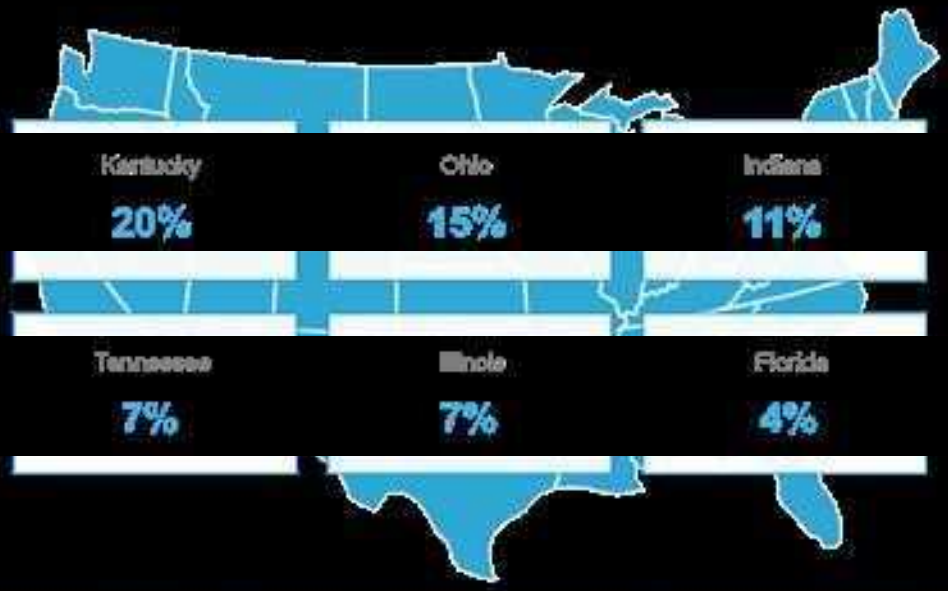
Main Purpose of Leisure Trip



Louisville's Overnight Trip Characteristics

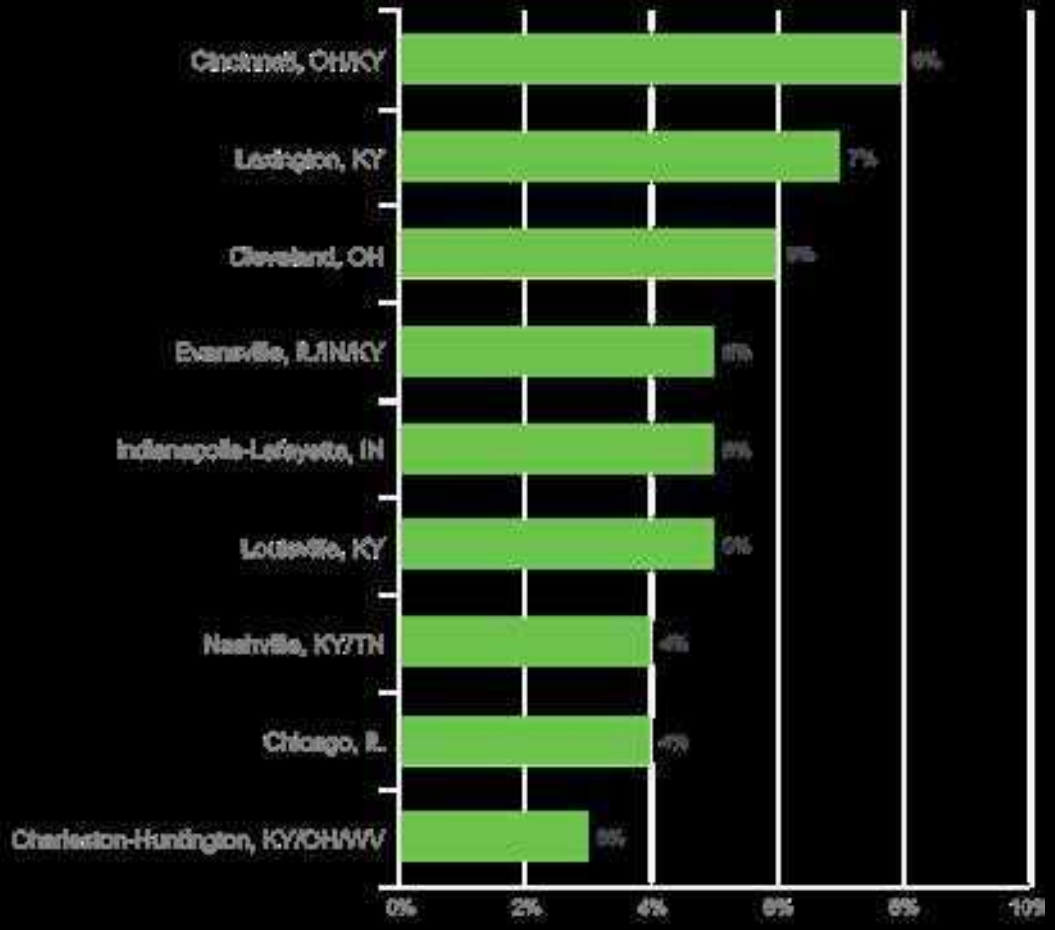
Base: 2018 Overnight Person-Trips

State Origin Of Trip



Season of Trip

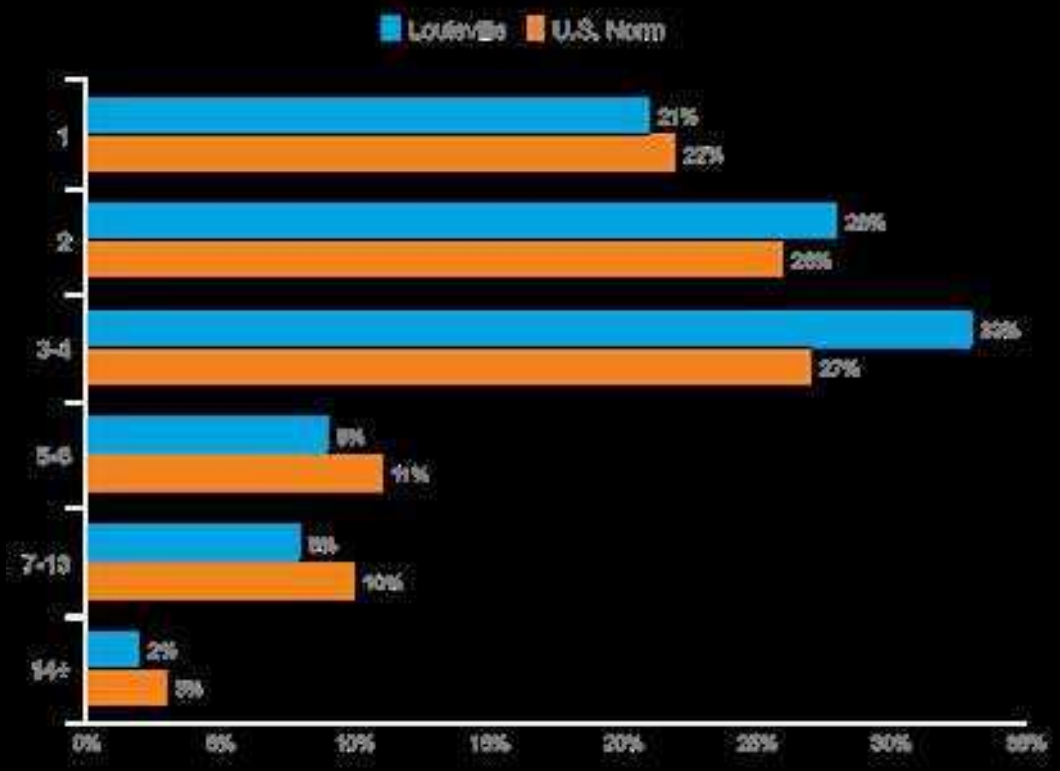
DMA Origin Of Trip



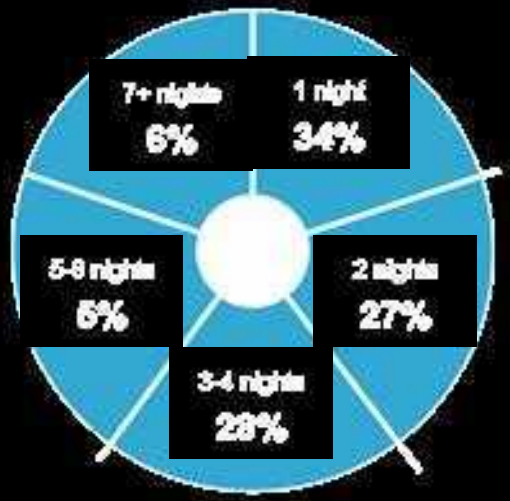
Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

Total Nights Away on Trip



Louisville	U.S. Norm
3.4	3.8
Average Nights	Average Nights

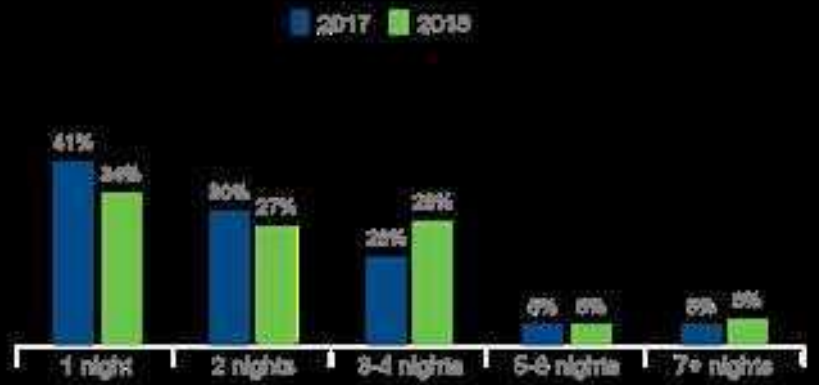


Nights Spent in Louisville

Average number of nights

2.8

Number of Nights Spent in Louisville - Trended



Average in 2018

2.8

Nights

Average in 2017

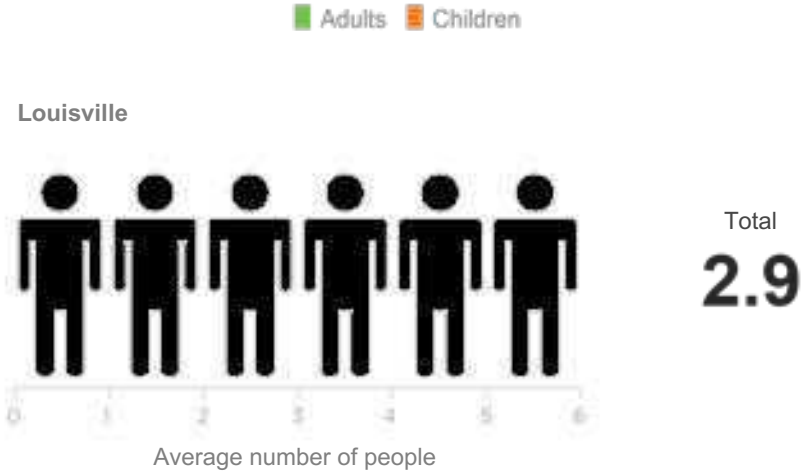
2.4

Nights

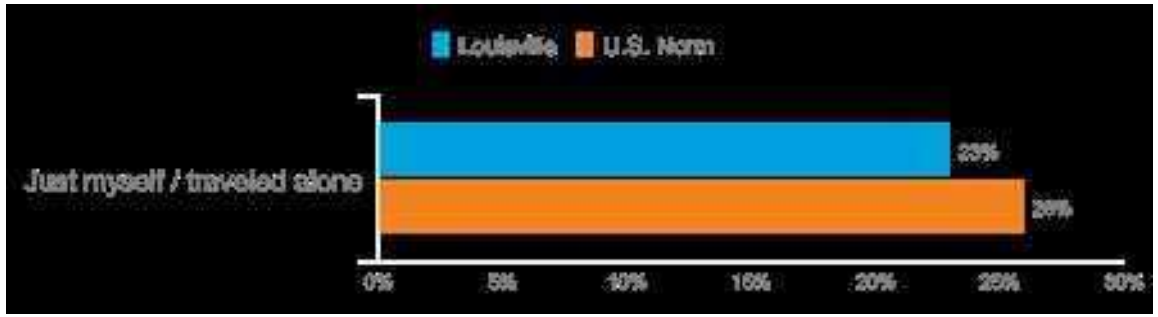
Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

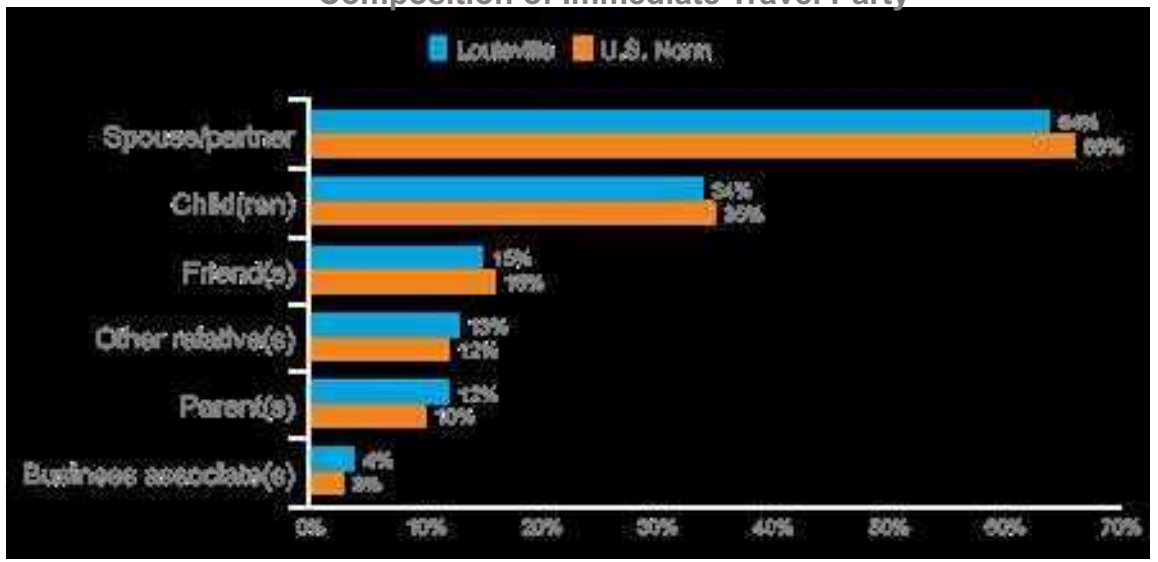
Size of Travel Party



Percent Who Traveled Alone



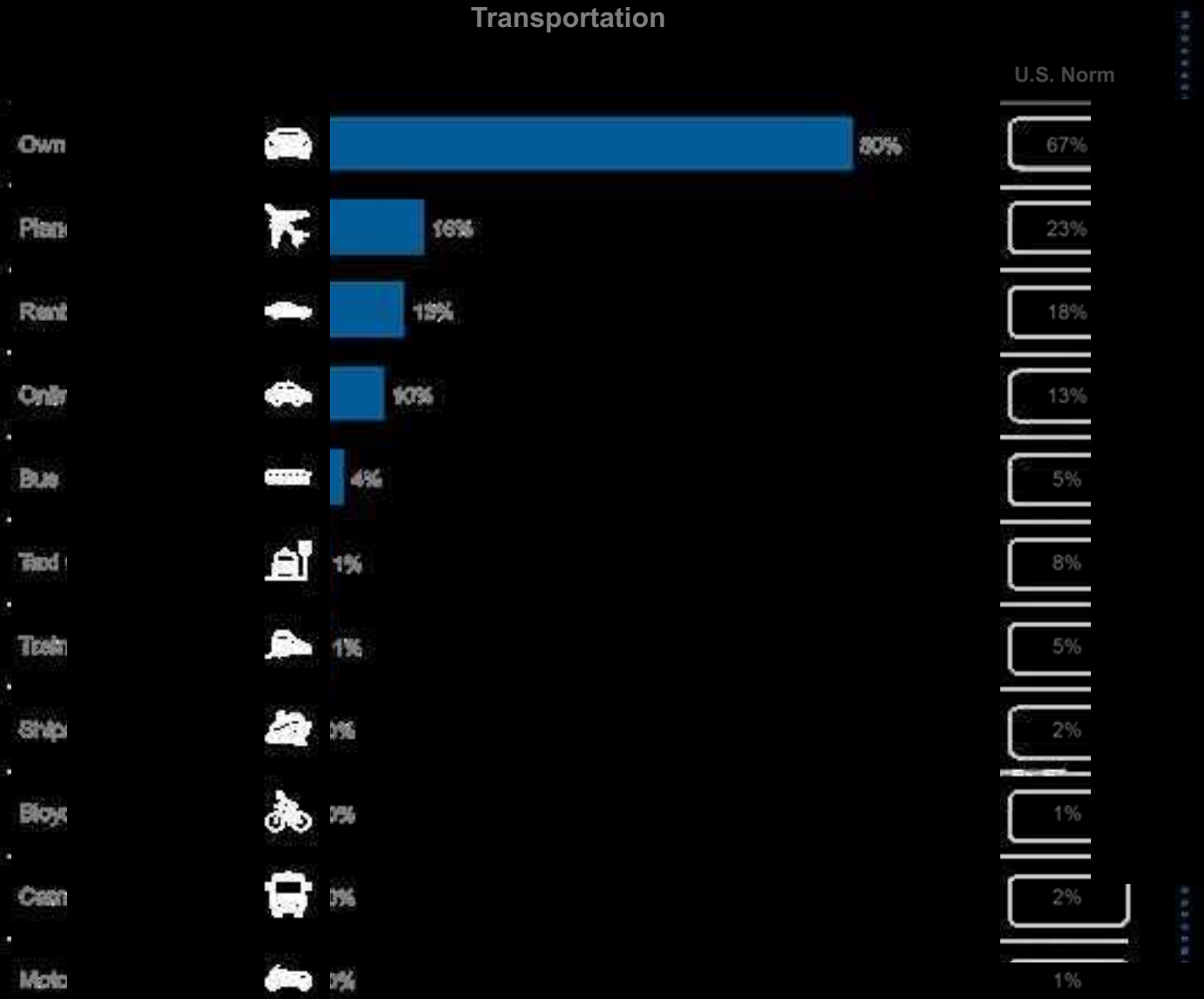
Composition of Immediate Travel Party



Louisville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

Transportation



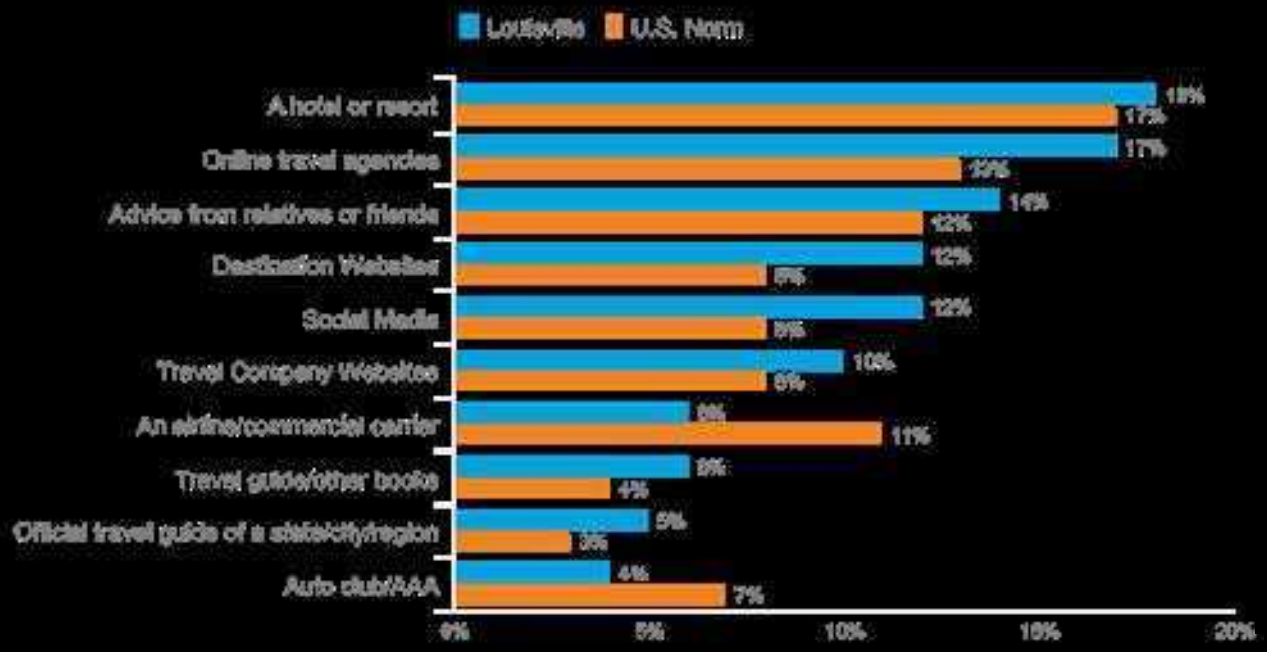
Accommodations

	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%

Louisville: Pre-Trip

Base: 2018 Overnight Person-Trips

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	16%
3-5 months	20%
2 months	16%
1 month or less	34%
Did not plan anything in advance	12%

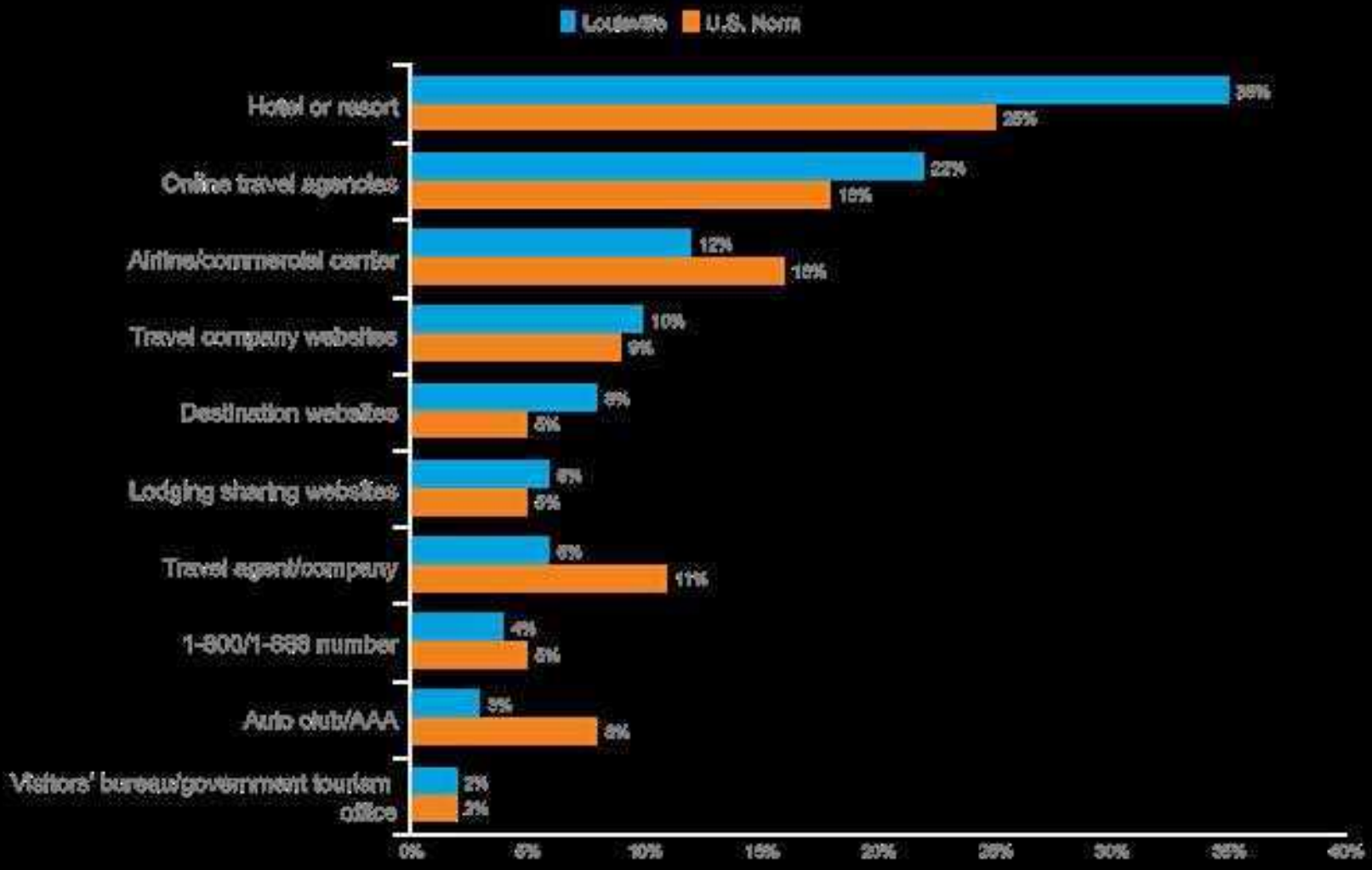
U.S. Norm

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

Louisville: Pre-Trip

Base: 2018 Overnight Person-Trips

Method of Booking



Louisville: During Trip

Base: 2018 Overnight Person-Trips

Activities of Special Interest (Top 5)
Louisville

Historic places	28%
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%

Louisville: During Trip

Base: 2018 Overnight Person-Trips

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%	25%
Looked at travel-related photos or video online	20%	23%
Accessed travel deals, news, events, or promotions	17%	20%

Devices Using During Trip

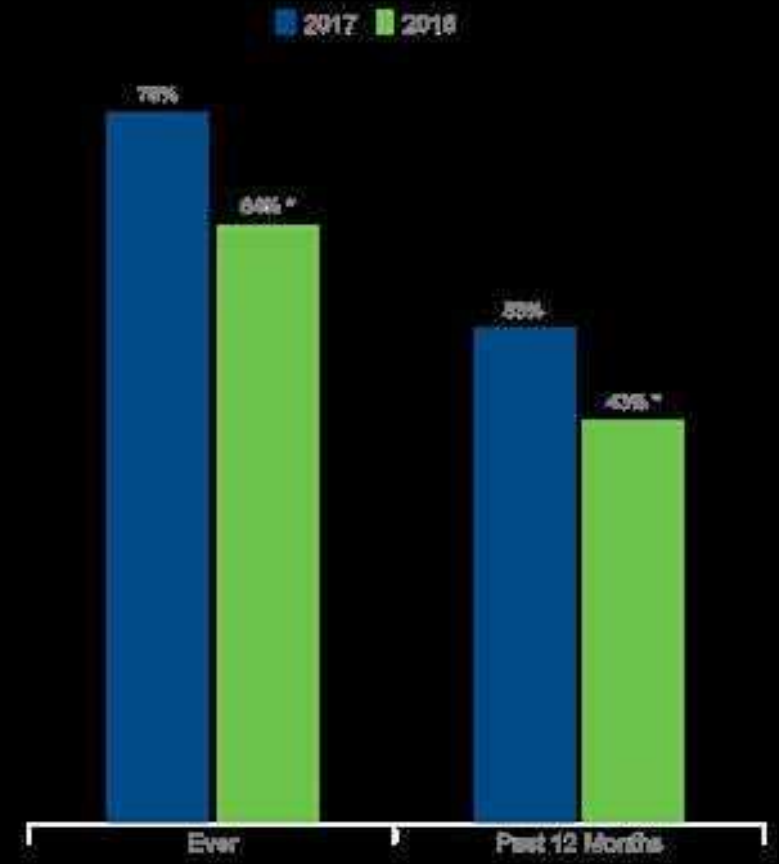
	Louisville	U.S. Norm
Any device	88%	83%
Smartphone	79%	68%
Laptop	31%	31%
Tablet	27%	26%

Louisville: During Trip

Base: 2018 Overnight Person-Trips

% Very Satisfied with Trip

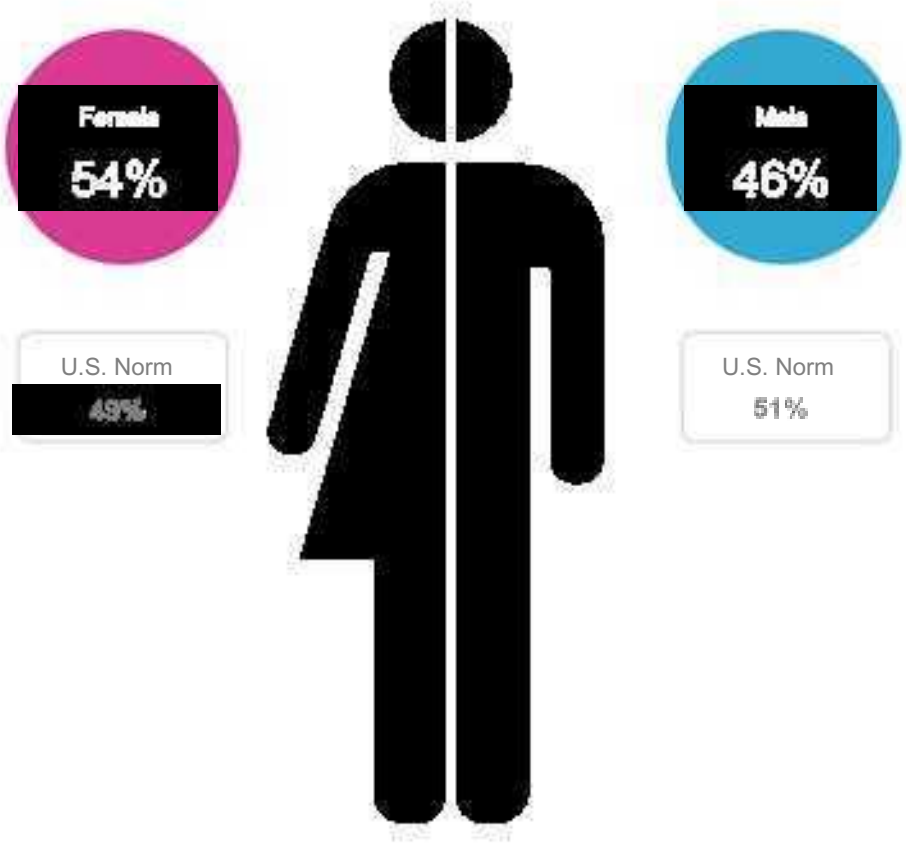
Past Visitation to Louisville



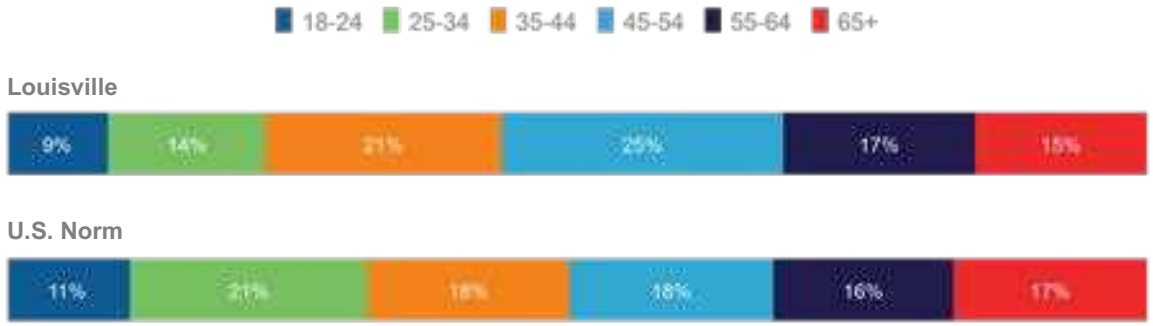
Demographic Profile of Overnight Louisville Visitors

Base: 2018 Overnight Person-Trips

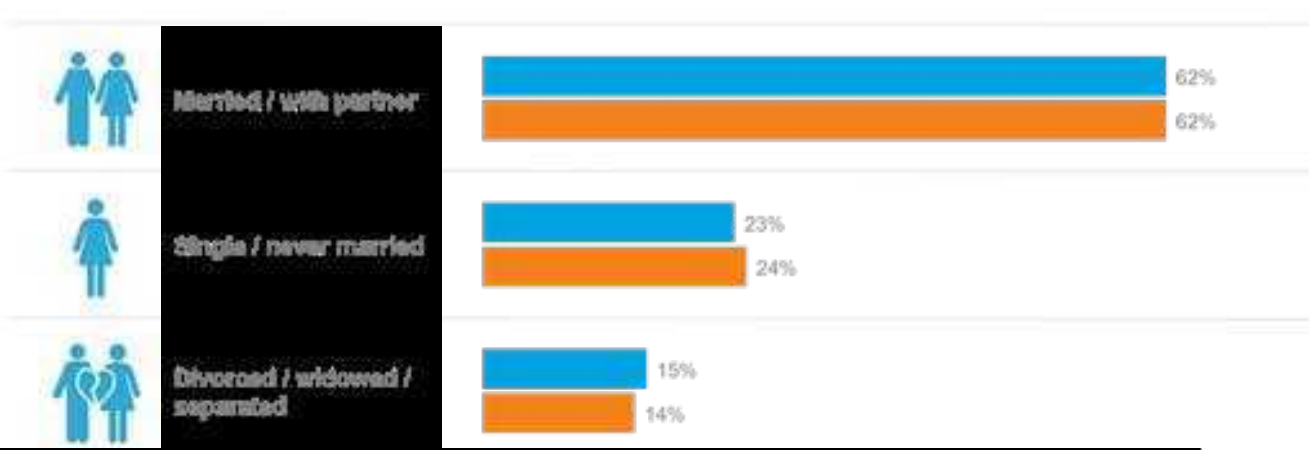
Gender



Age



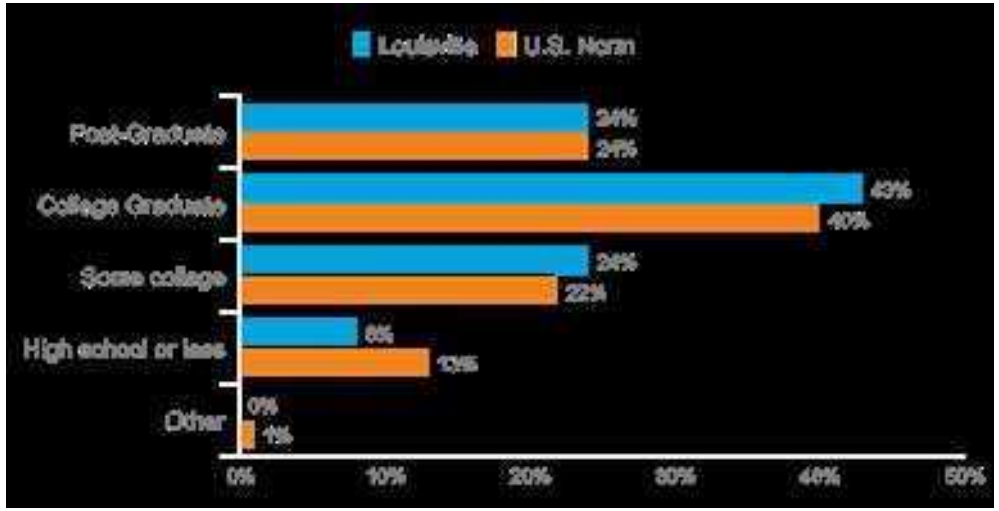
Marital Status



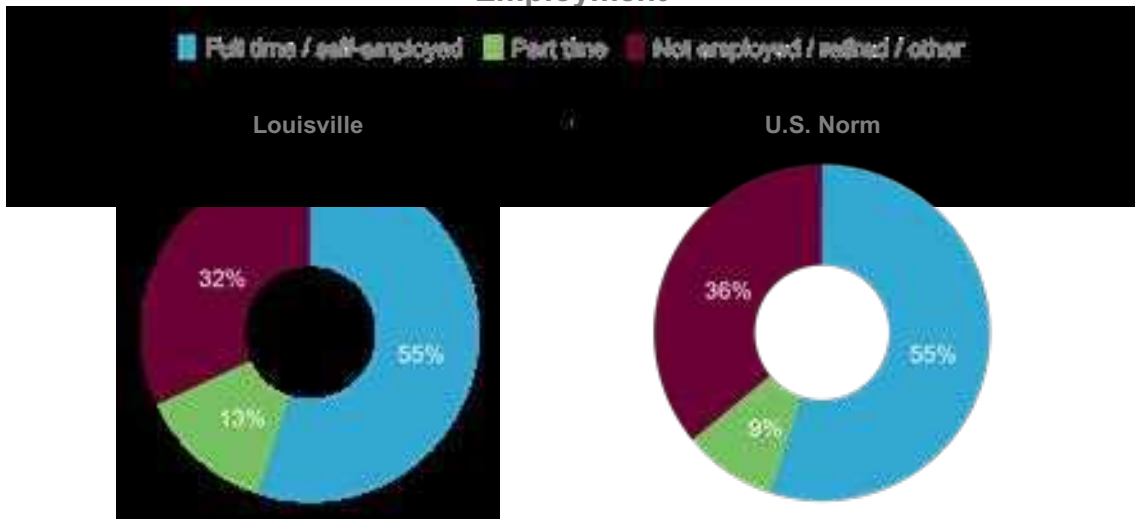
Demographic Profile of Overnight Louisville Visitors

Base: 2018 Overnight Person-Trips

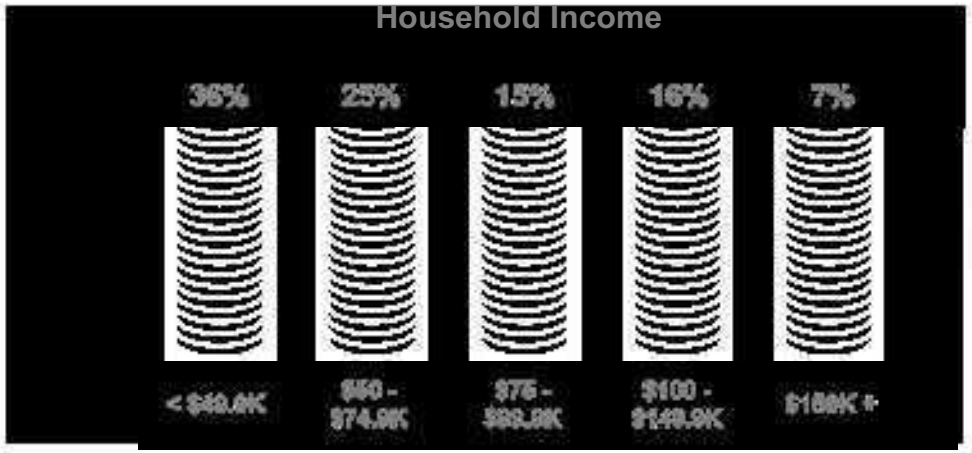
Education



Employment

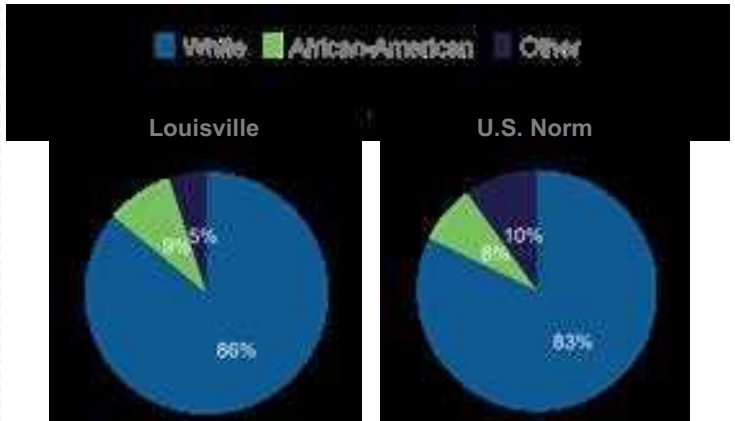


Household Income

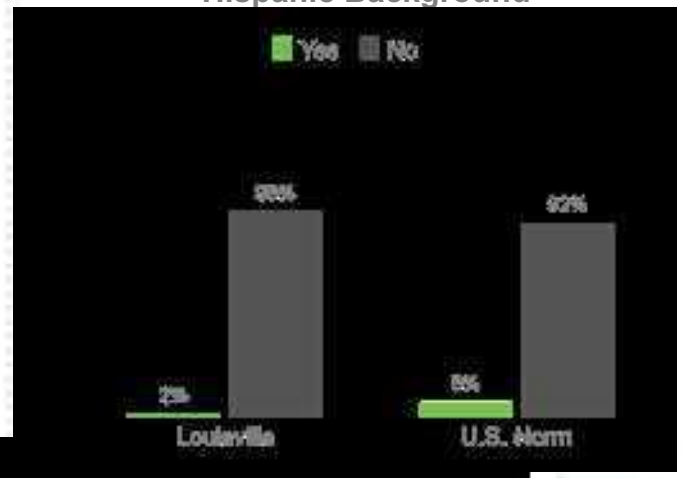


	< $49.9K	$50 - $74.9K	$75 - $99.9K	$100 - $149.9K	$150K +
U.S. Norm	38%	22%	16%	16%	7%

Race



Hispanic Background

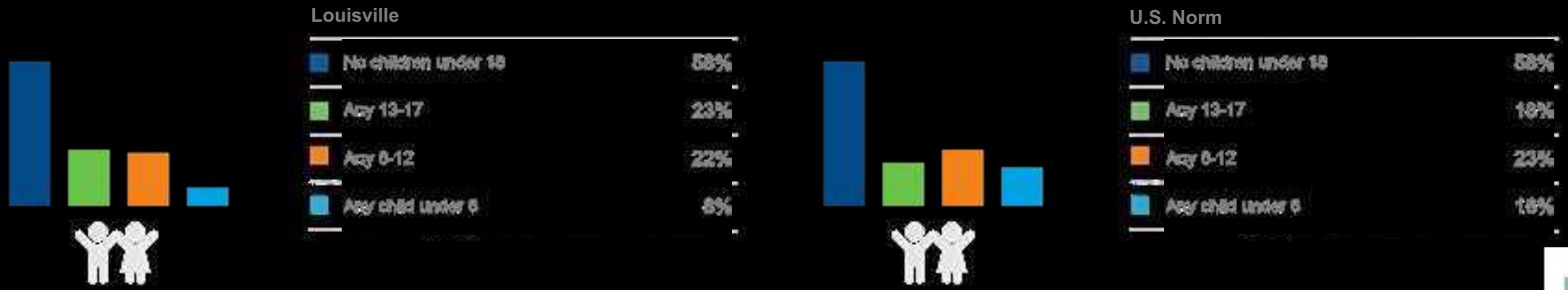


Demographic Profile of Overnight Louisville Visitors

Base: 2018 Overnight Person-Trips

Household Size

Children in Household



Louisville Day Visitor Research

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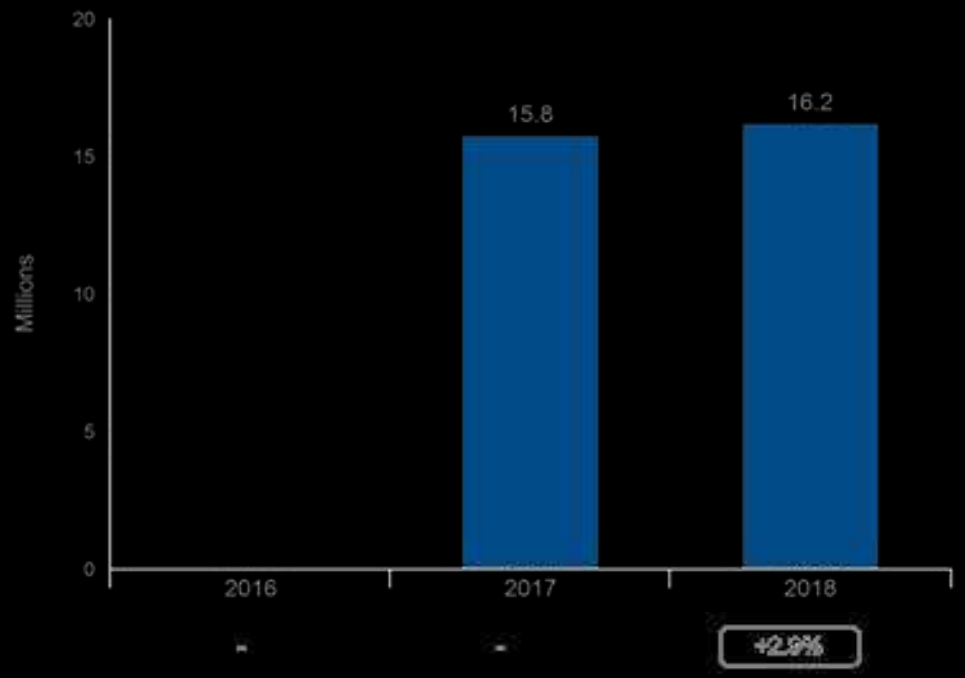
Size and Structure of Louisville's Domestic Travel Market

Base: 2018 Day Person-Trips

Day Trips to Louisville



Total Size of Louisville 2018 Domestic Travel Market

Total Person-Trips

25.4 Million

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

Ad
72%
11.7 Million

Ch
28%
4.5 Million

Louisville's Day Trip Expenditures

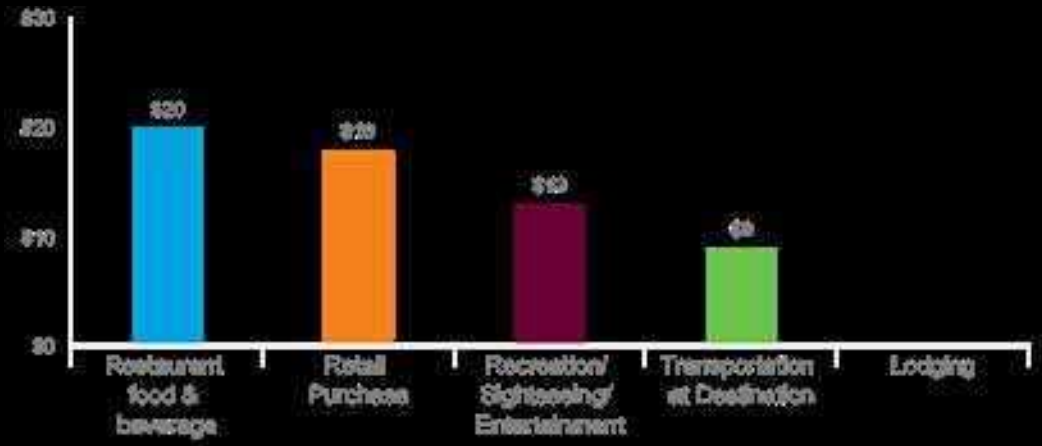
Base: 2018 Day Person-Trips

Domestic Day Expenditures - by Sector

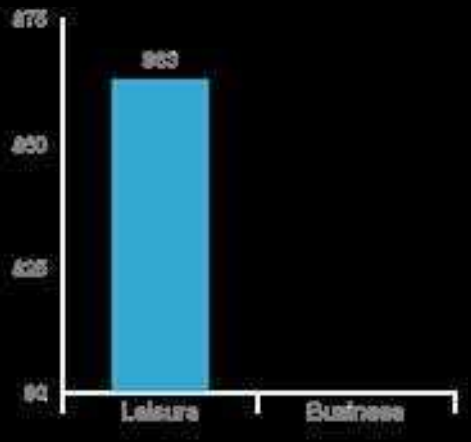
Total Spending

$ 0.980 Billion

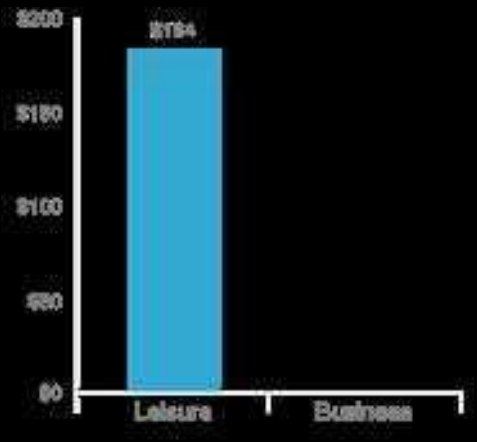
Average Per Person Expenditures on Domestic Day Trips - by Sector



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



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

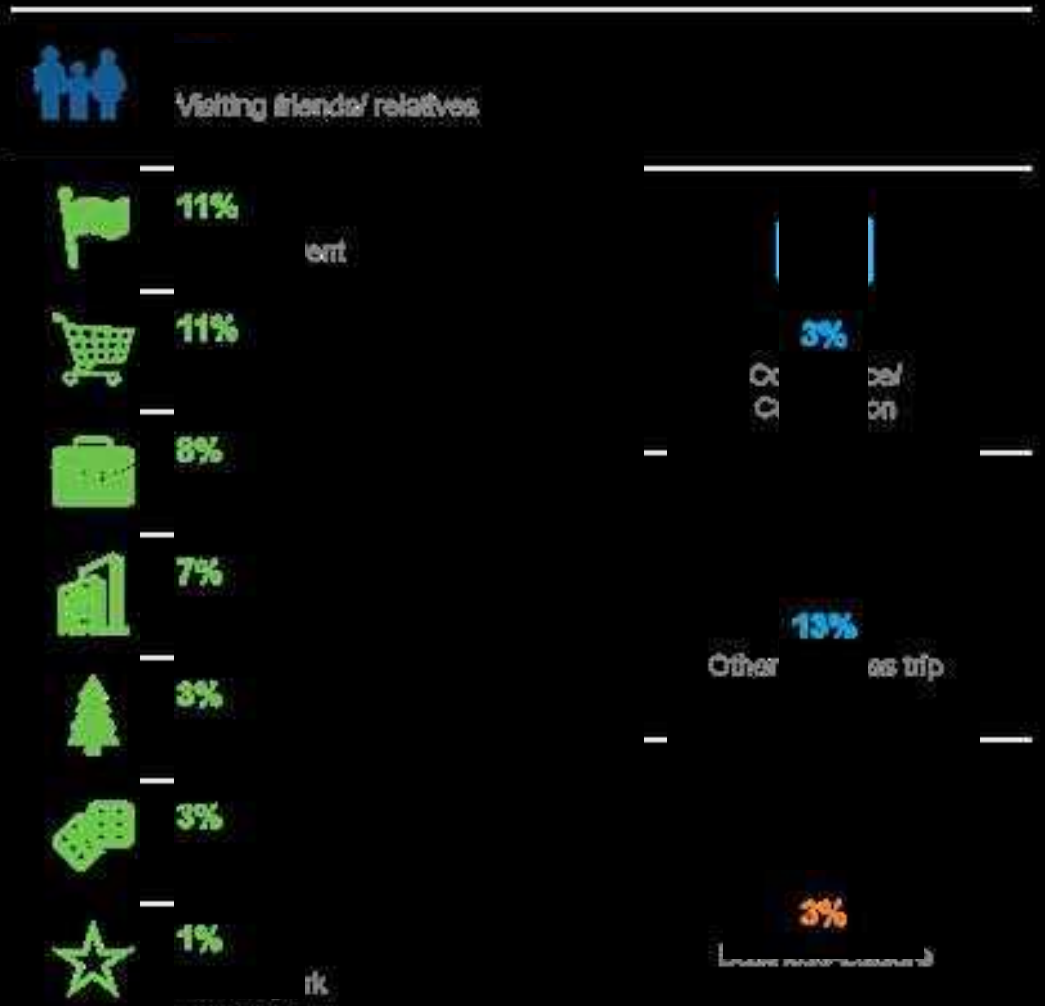


Average Per Party Expenditures on Domestic Day Trips - by Sector

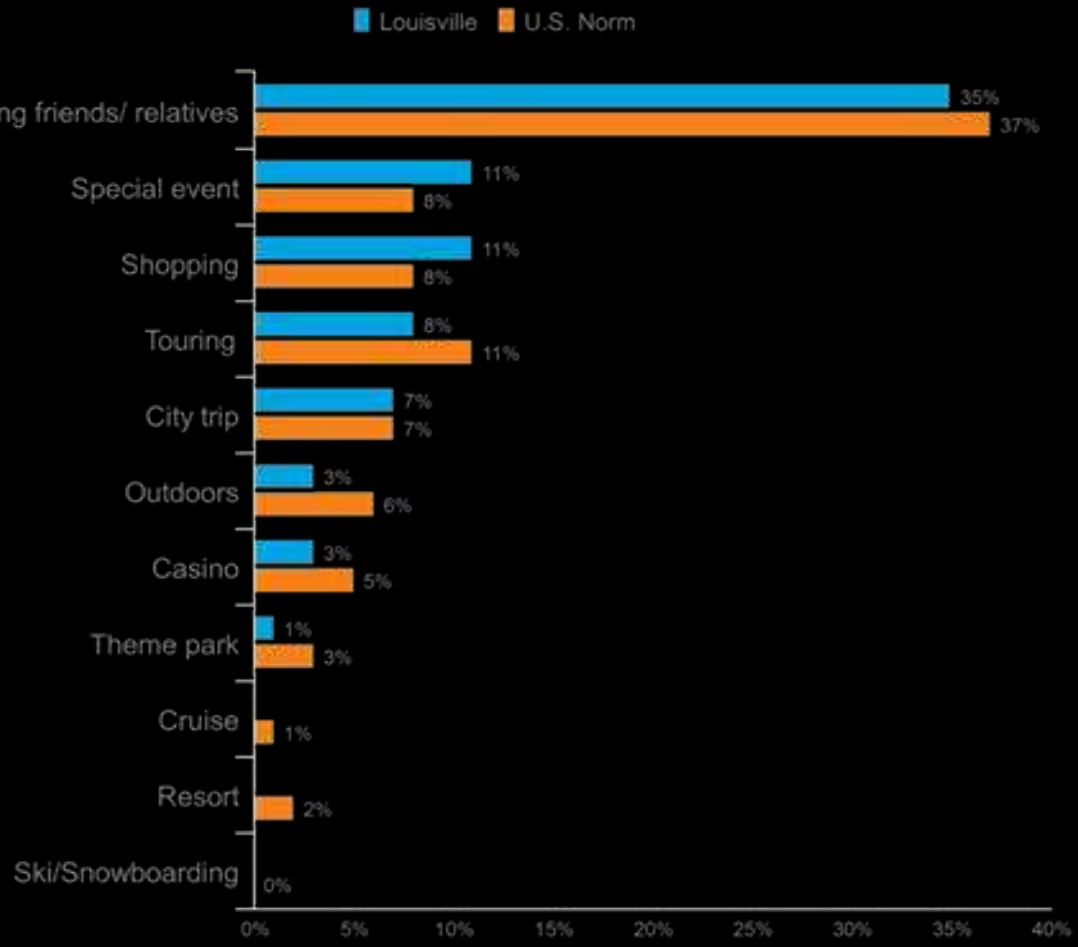
Louisville's Day Trip Characteristics

Base: 2018 Day Person-Trips

Main Purpose of Trip



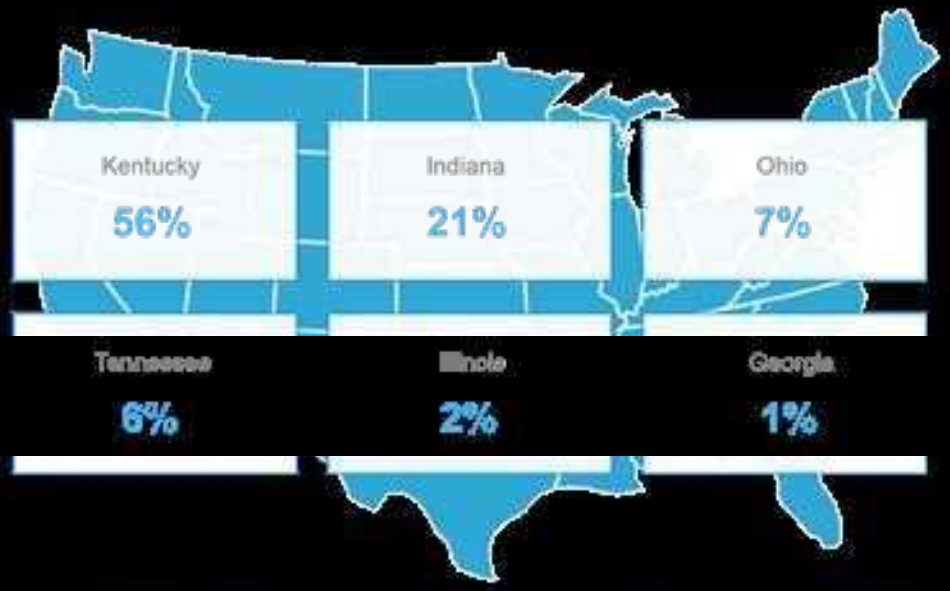
Main Purpose of Leisure Trip



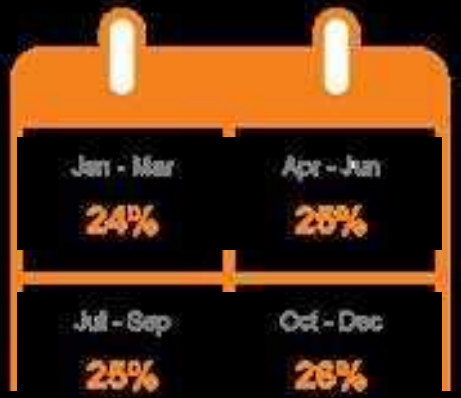
Louisville's Day Trip Characteristics

Base: 2018 Day Person-Trips

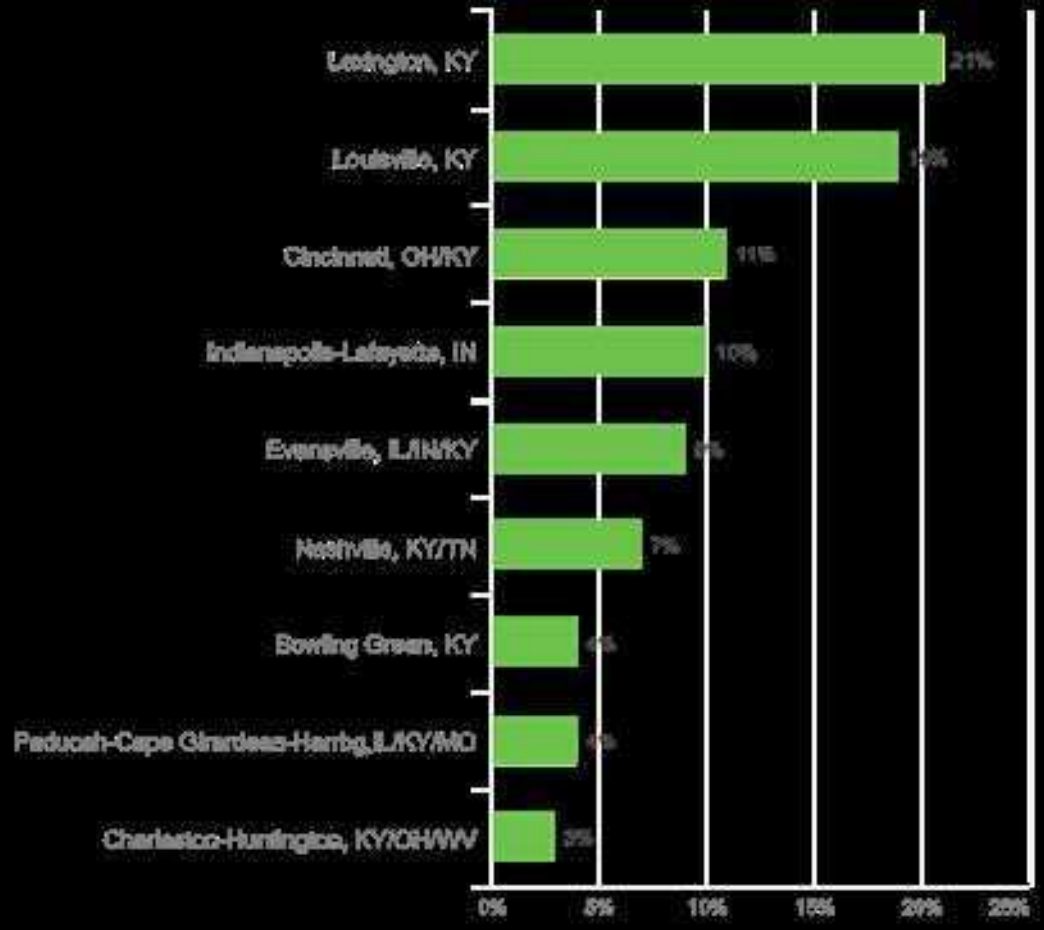
State Origin Of Trip



Season of Trip



DMA Origin Of Trip

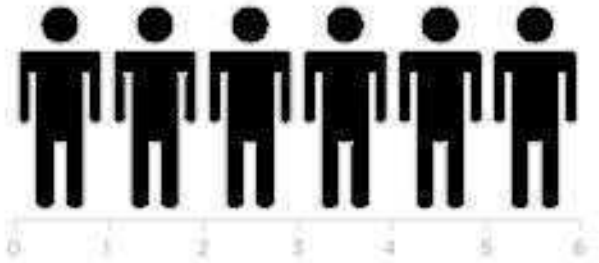


Louisville's Day Trip Characteristics

Base: 2018 Day Person-Trips

Size of Travel Party

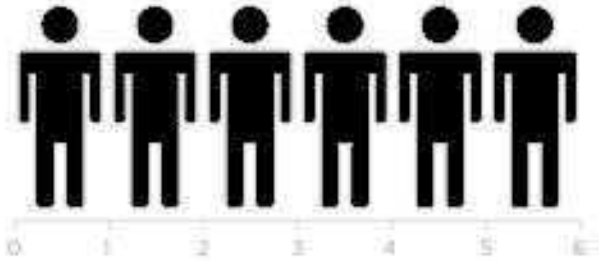
Louisville



Total
2.7

Average number of people

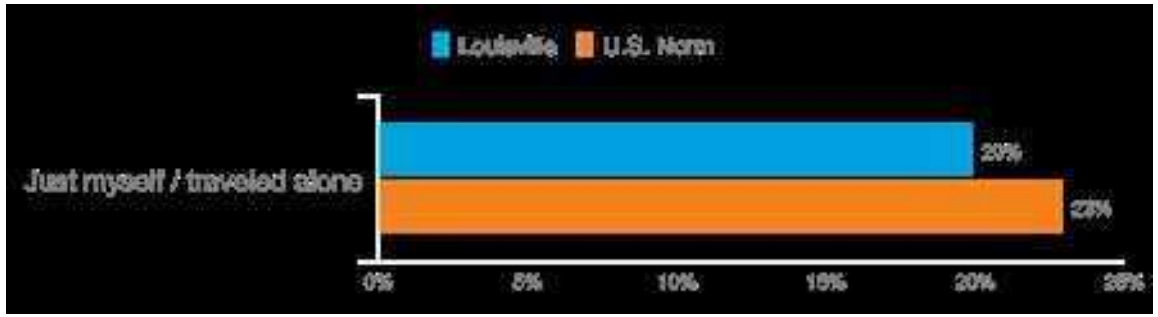
U.S. Norm



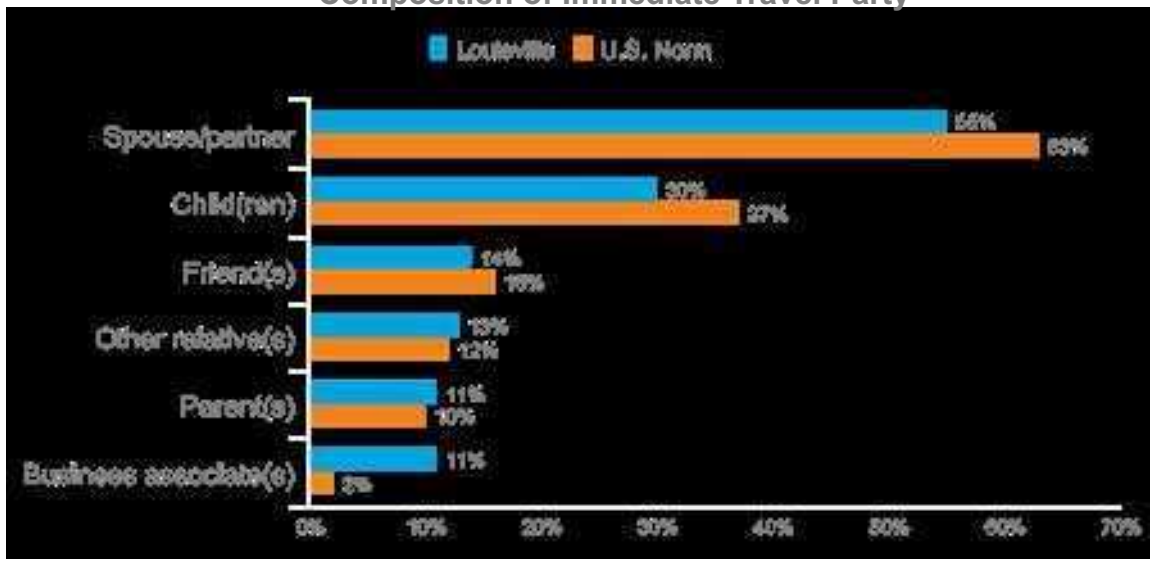
Total
2.6

Average number of people

Percent Who Traveled Alone



Composition of Immediate Travel Party



Louisville: During Trip

Base: 2018 Day Person-Trips

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

Historic places	17%
Cultural activities/Attractions	13%
Exceptional Culinary Experiences	8%
Brewery Tours/Beer Tasting	5%
Winery Tours/Tasting	5%

Louisville: During Trip

Base: 2018 Day Person-Trips

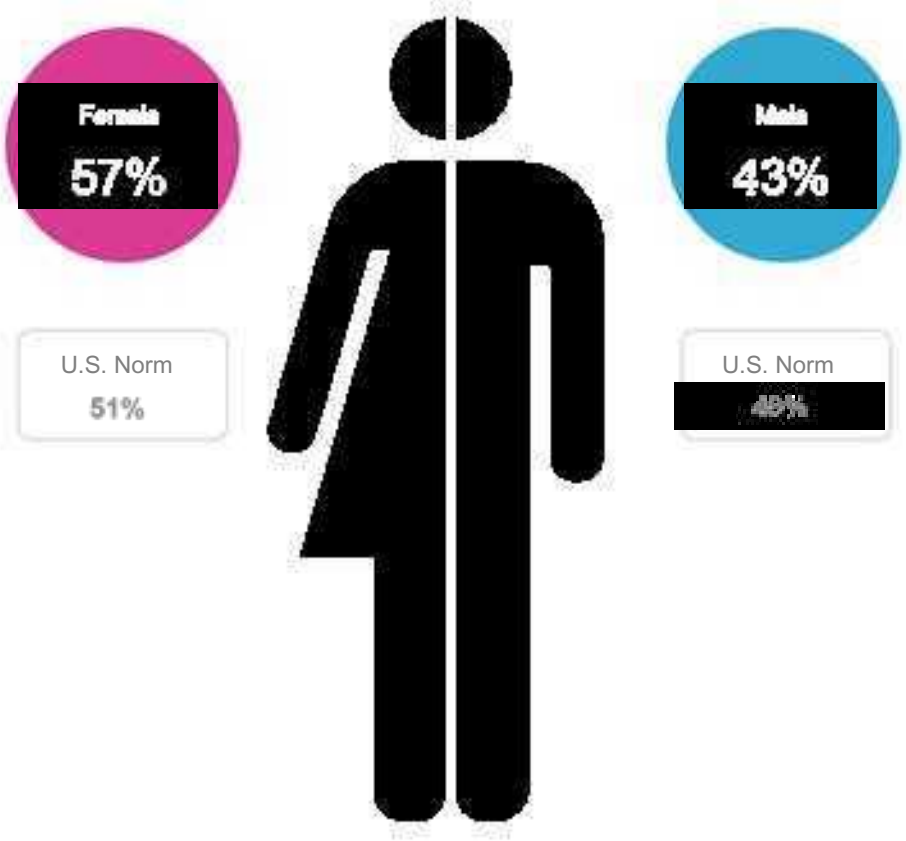
Online Social Media Use by Travelers

	Louisville	U.S. Norm
Used any social media	68%	66%
Posted travel photos or video online	35%	27%
Looked at travel-related photos or video online	34%	24%
Read travel reviews	30%	28%
Accessed travel deals, news, events, or promotions	25%	21%

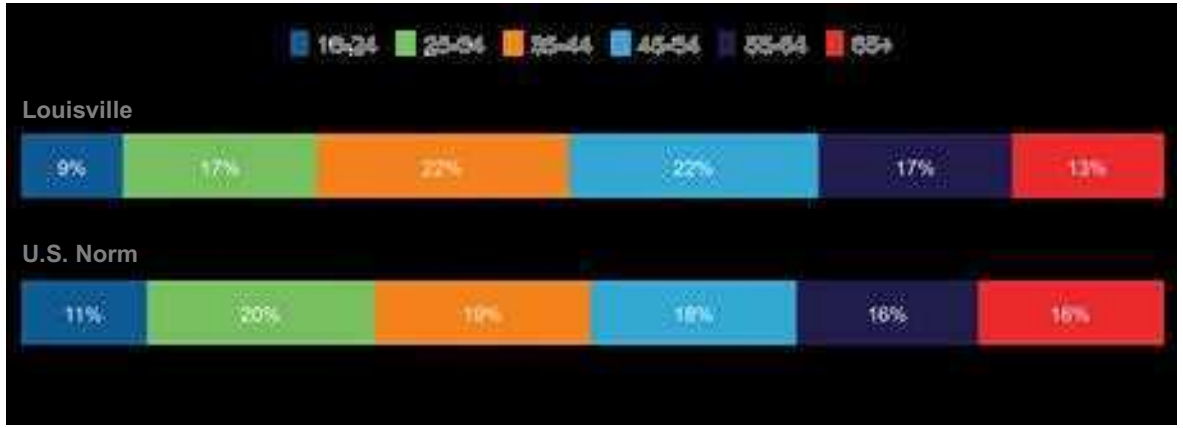
Demographic Profile of Day Louisville Visitors

Base: 2018 Day Person-Trips

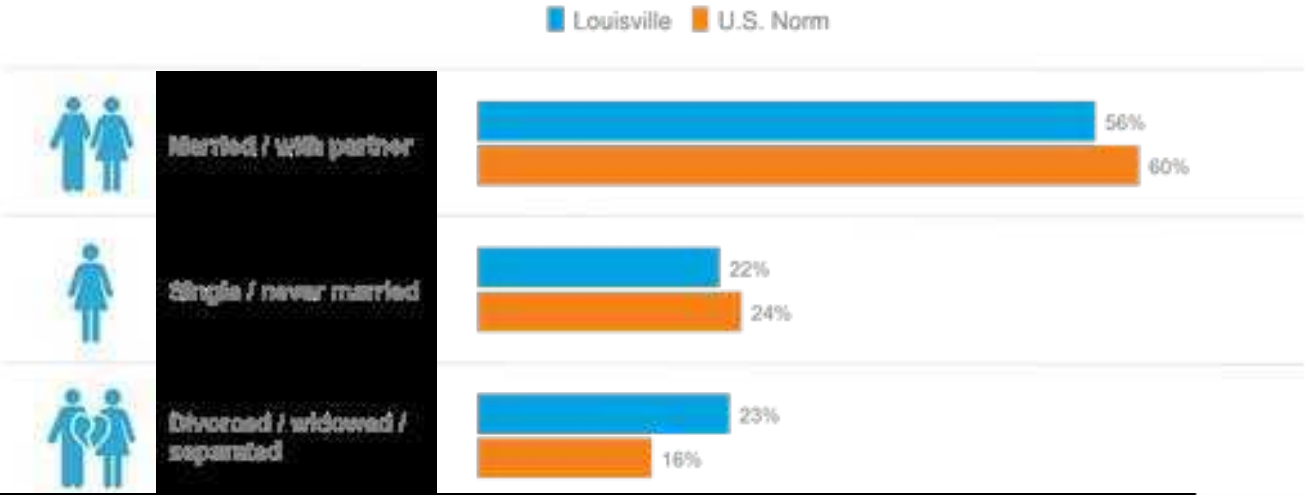
Gender



Age



Marital Status



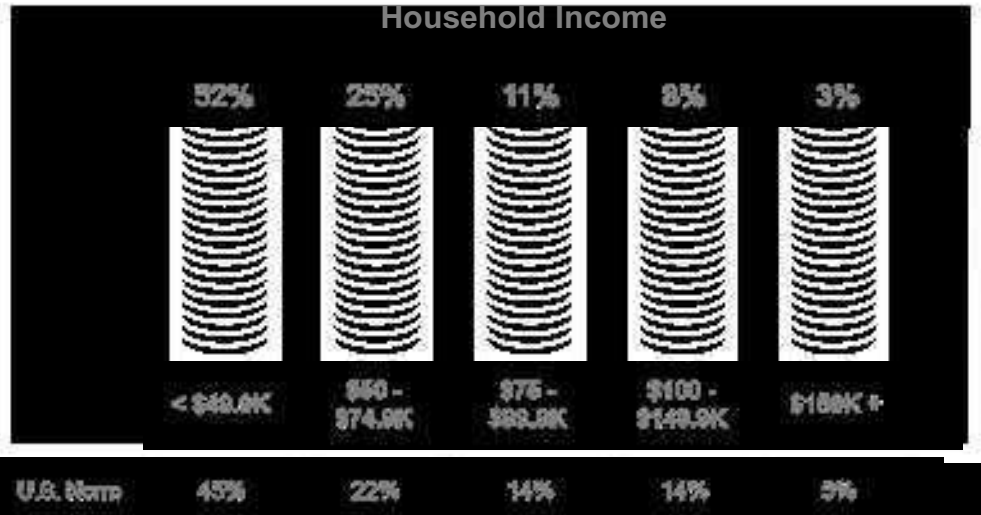
Demographic Profile of Day Louisville Visitors

Base: 2018 Day Person-Trips

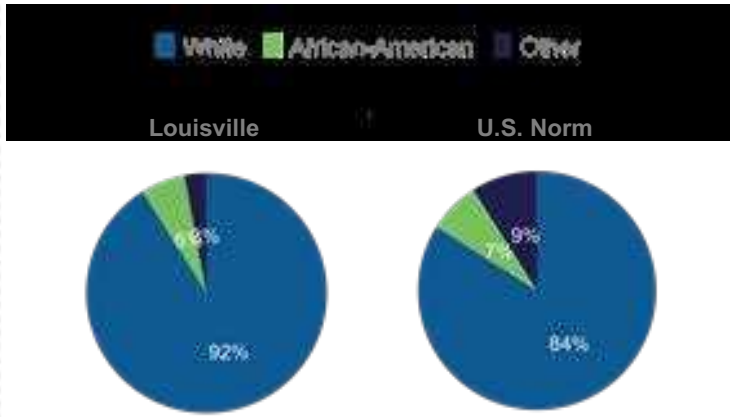
Education

Employment

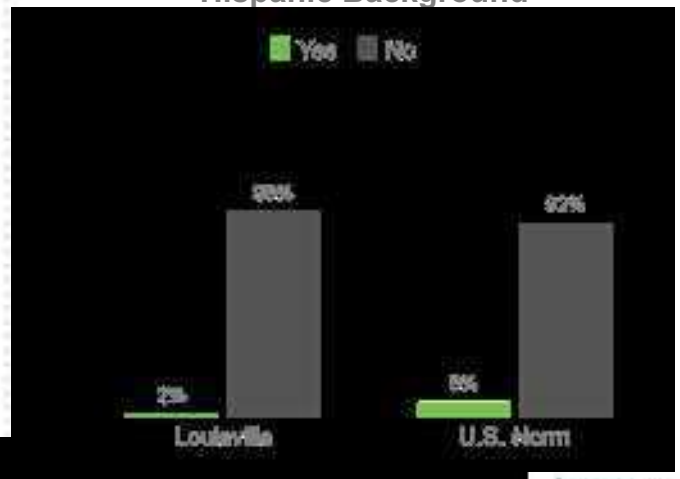
Household Income



Race



Hispanic Background

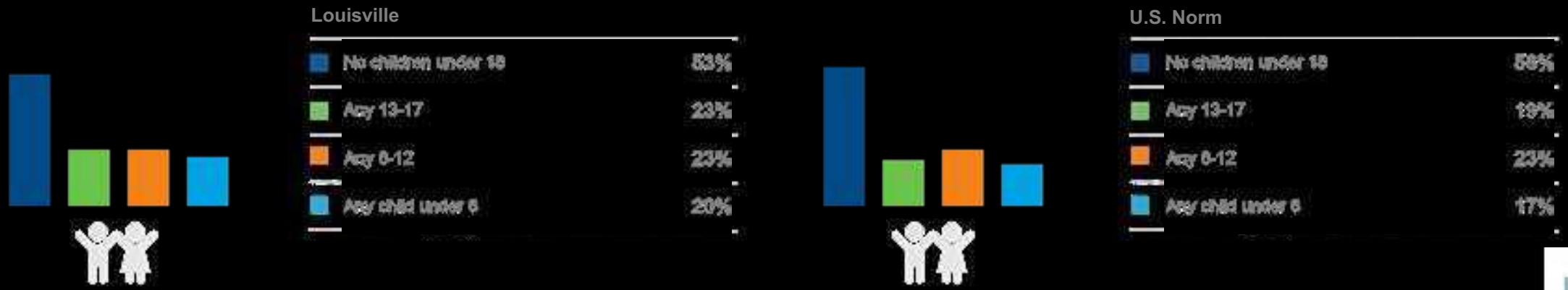


Demographic Profile of Day Louisville Visitors

Base: 2018 Day Person-Trips

Household Size

Children in Household



Longwoods
INTERNATIONAL
40 YEARS TOGETHER