



## Jacksonville Visitor Research

Travel USA®

Prepared for  
Visit Jacksonville

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**<sup>®</sup> 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 2018.

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 overnight and 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**<sup>®</sup> 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 Jacksonville, the following sample was achieved in 2018:
  - 1,328 trips:
    - 1,050 overnight trips
    - 278 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



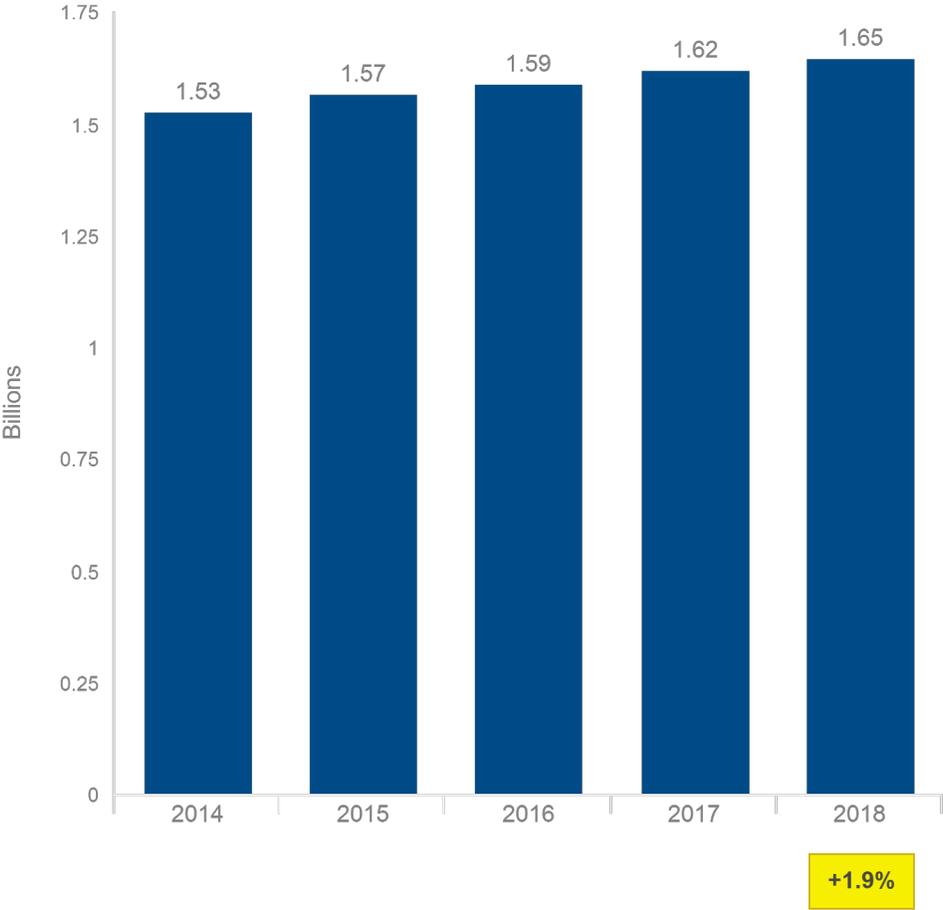
# Jacksonville Overnight Visitor Research

**Travel USA®**

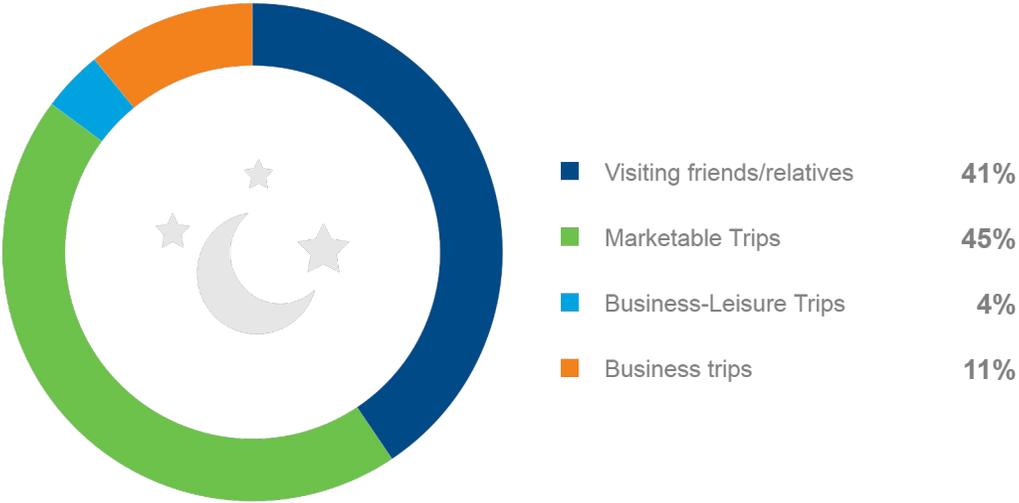


Prepared for  
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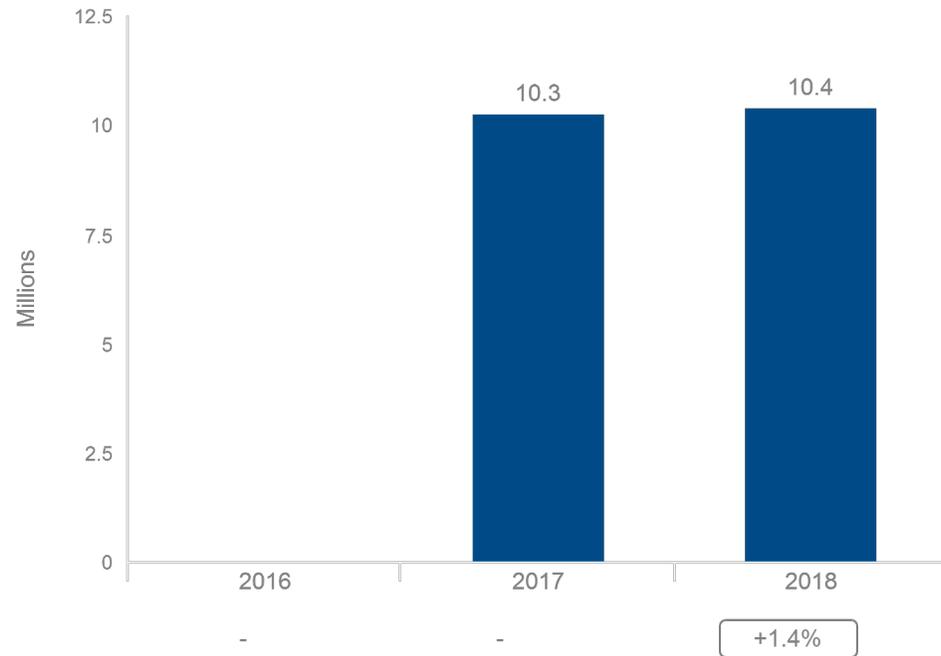
### Total Size of U.S. Overnight Travel Market



### 2018 Overnight Trips



## Overnight Trips to Jacksonville



## Total Size of Jacksonville 2018 Domestic Travel Market

Total Person-Trips

**22.2 Million**

+1.3% vs. last year

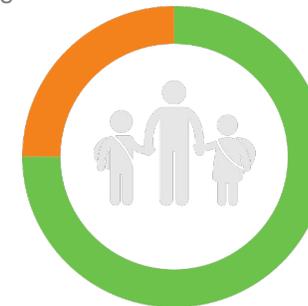


- Day: 53% | 11.8 Million
- Overnight: 47% | 10.4 Million

## Size of Jacksonville Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips

**10.4 Million**



- Adults: 75% | 7.8 Million
- Children: 25% | 2.6 Million

## Domestic Overnight Expenditures - by Sector

Total Spending

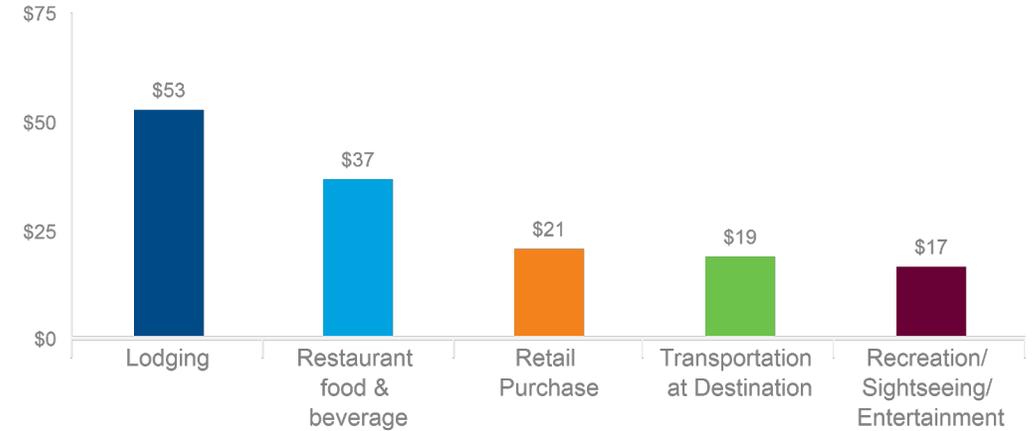
**\$ 1.522 Billion**

+4.3% vs. last year

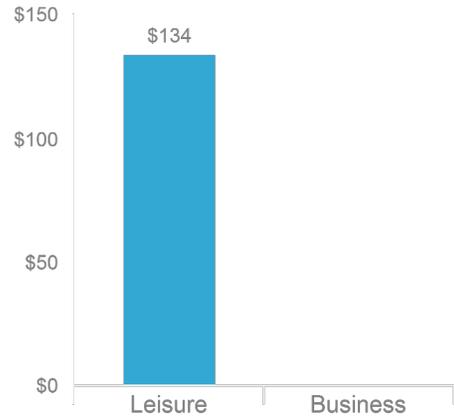


- Lodging  
36% | \$550 Million
- Transportation at Destination  
13% | \$194 Million
- Restaurant Food & Beverage  
25% | \$386 Million
- Retail Purchase  
14% | \$221 Million
- Recreation/Entertainment  
11% | \$172 Million

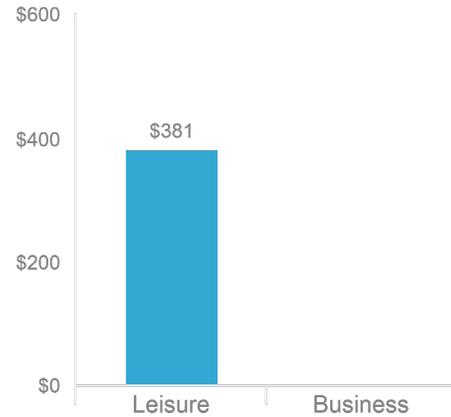
## Average Per Person Expenditures on Domestic Overnight Trips - by Sector



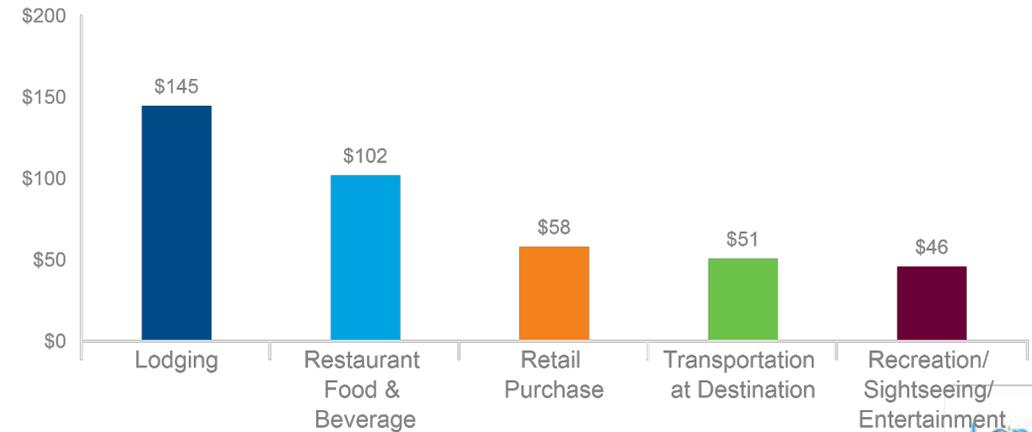
## Average Per Person Expenditures on Domestic Overnight Trips - by Trip Purpose



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



## Average Per Party Expenditures on Domestic Overnight Trips - by Sector



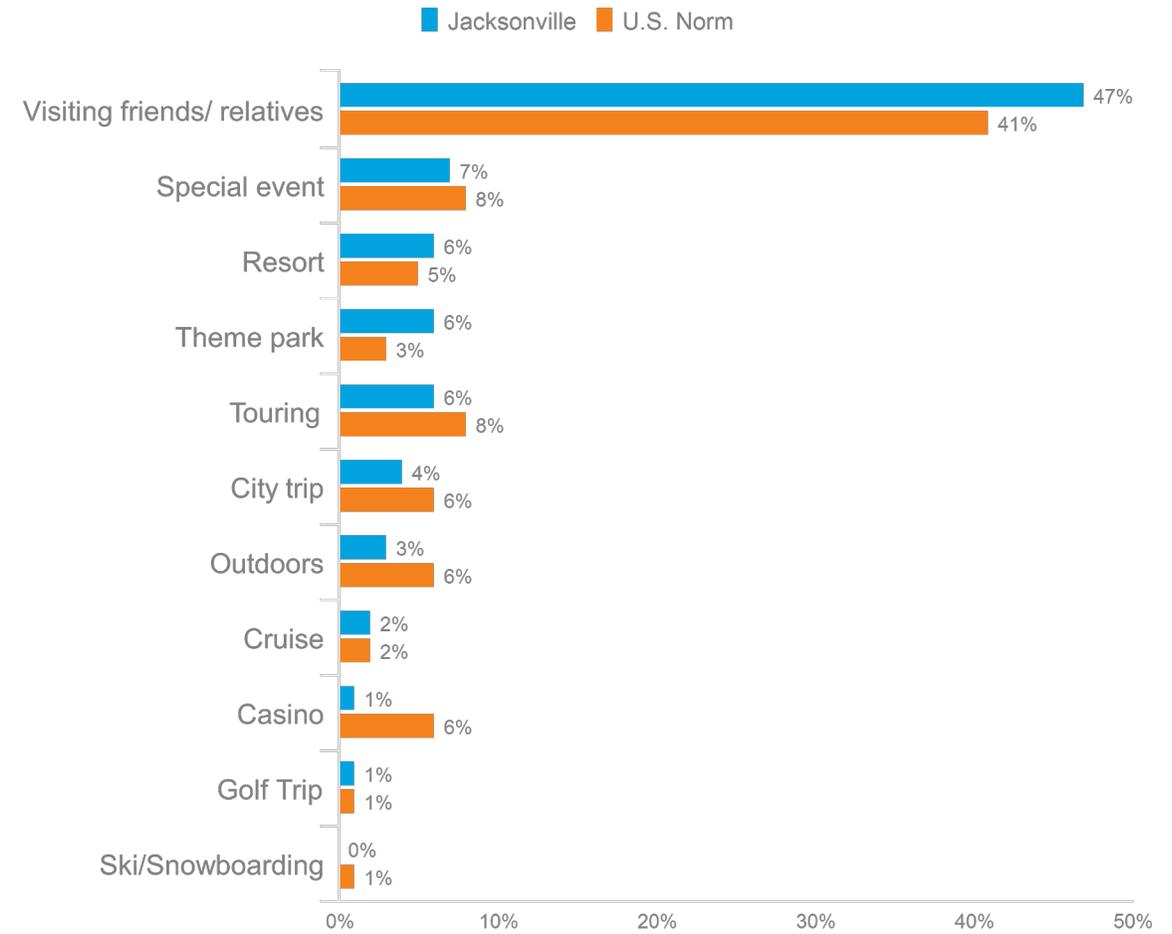
# Jacksonville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

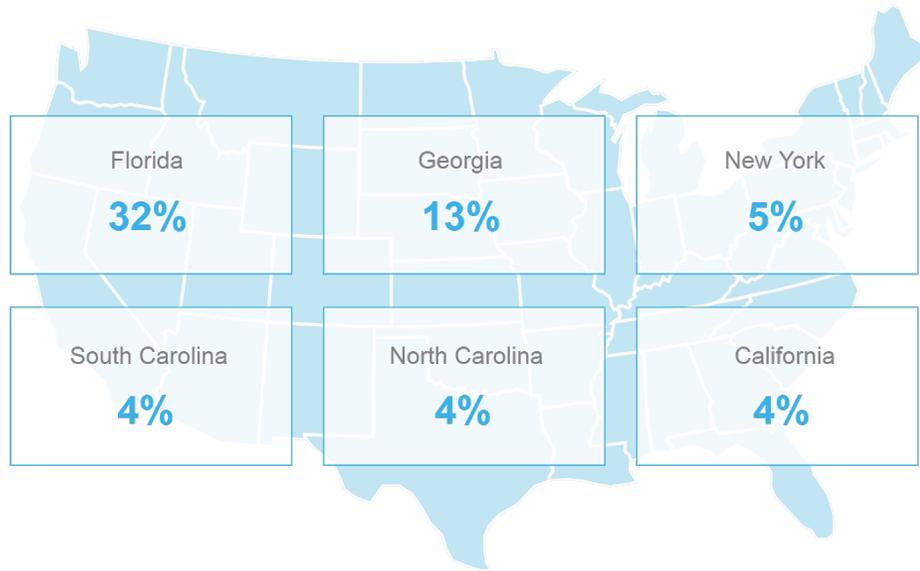
## Main Purpose of Trip



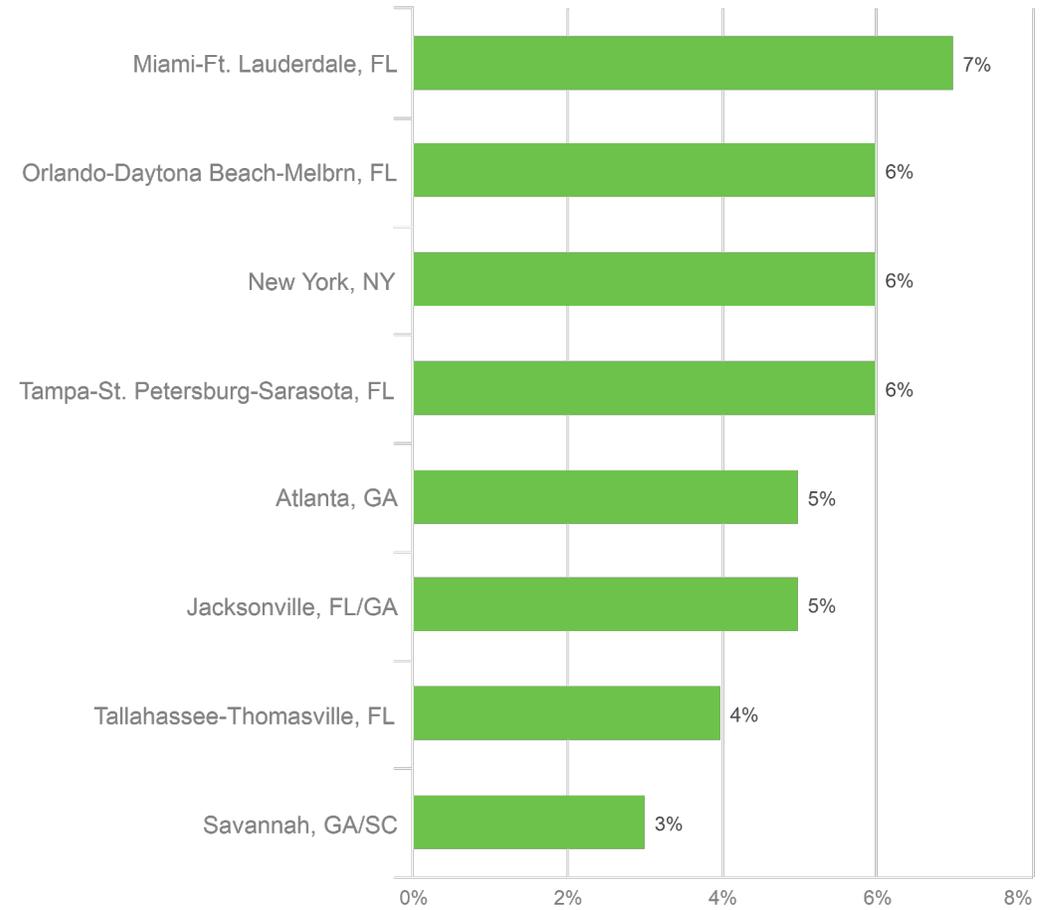
## Main Purpose of Leisure Trip



## State Origin Of Trip



## DMA Origin Of Trip



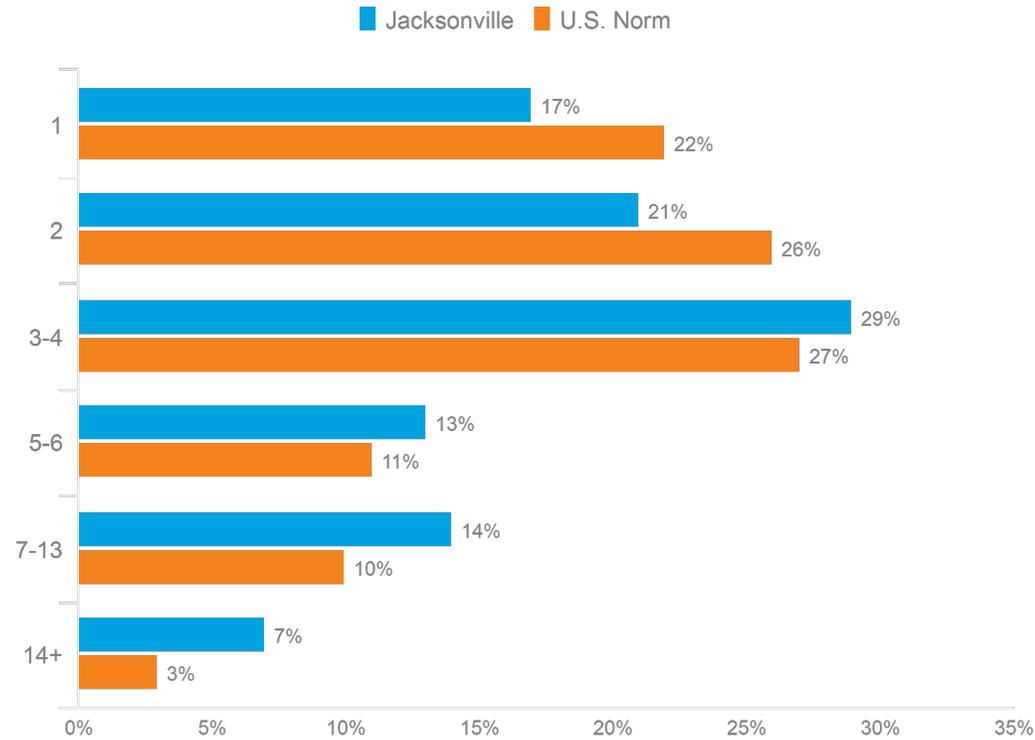
## Season of Trip



# Jacksonville's Overnight Trip Characteristics

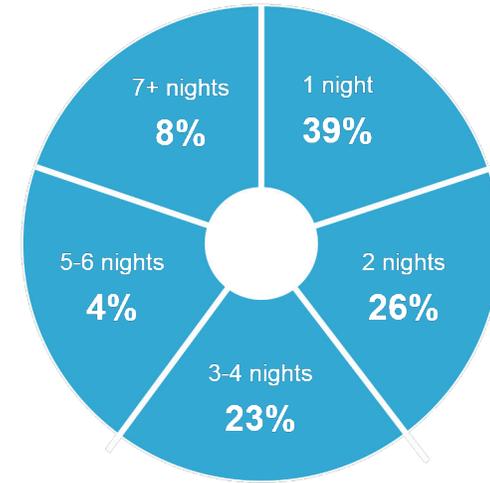
Base: 2018 Overnight Person-Trips

## Total Nights Away on Trip



Jacksonville  
**5.0**  
Average Nights

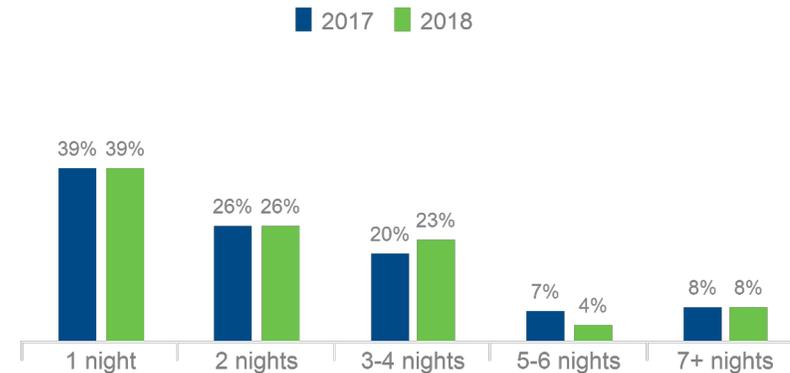
U.S. Norm  
**3.8**  
Average Nights



## Nights Spent in Jacksonville

Average number of nights  
**3.1**

## Number of Nights Spent in Jacksonville - Trended



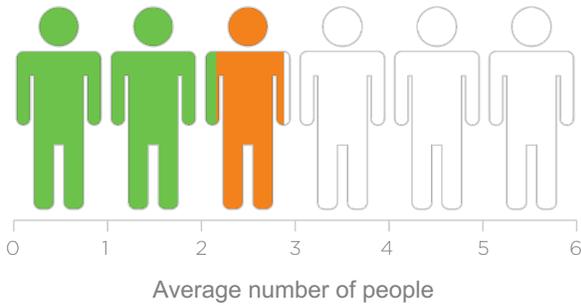
Average in 2018  
**3.1**  
Nights

Average last year  
**2.9**  
Nights

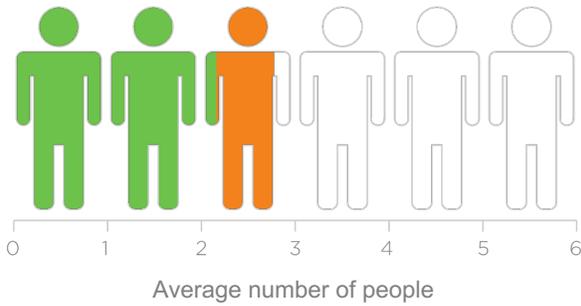
## Size of Travel Party

■ Adults ■ Children

### Jacksonville

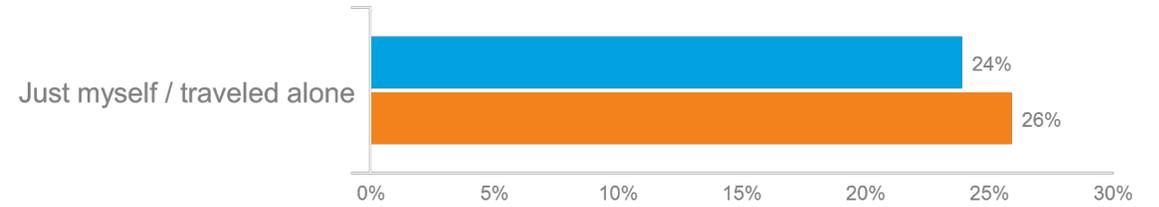


### U.S. Norm



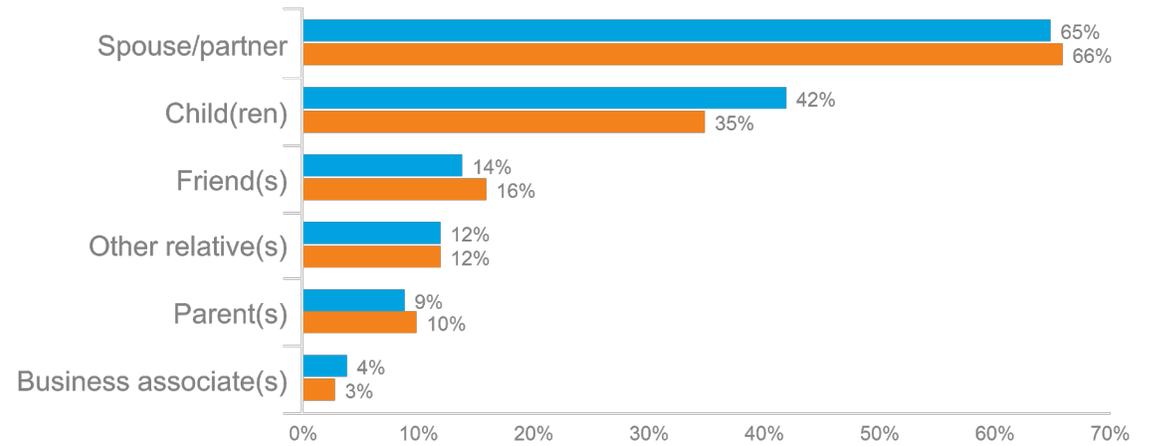
## Percent Who Traveled Alone

■ Jacksonville ■ U.S. Norm



## Composition of Immediate Travel Party

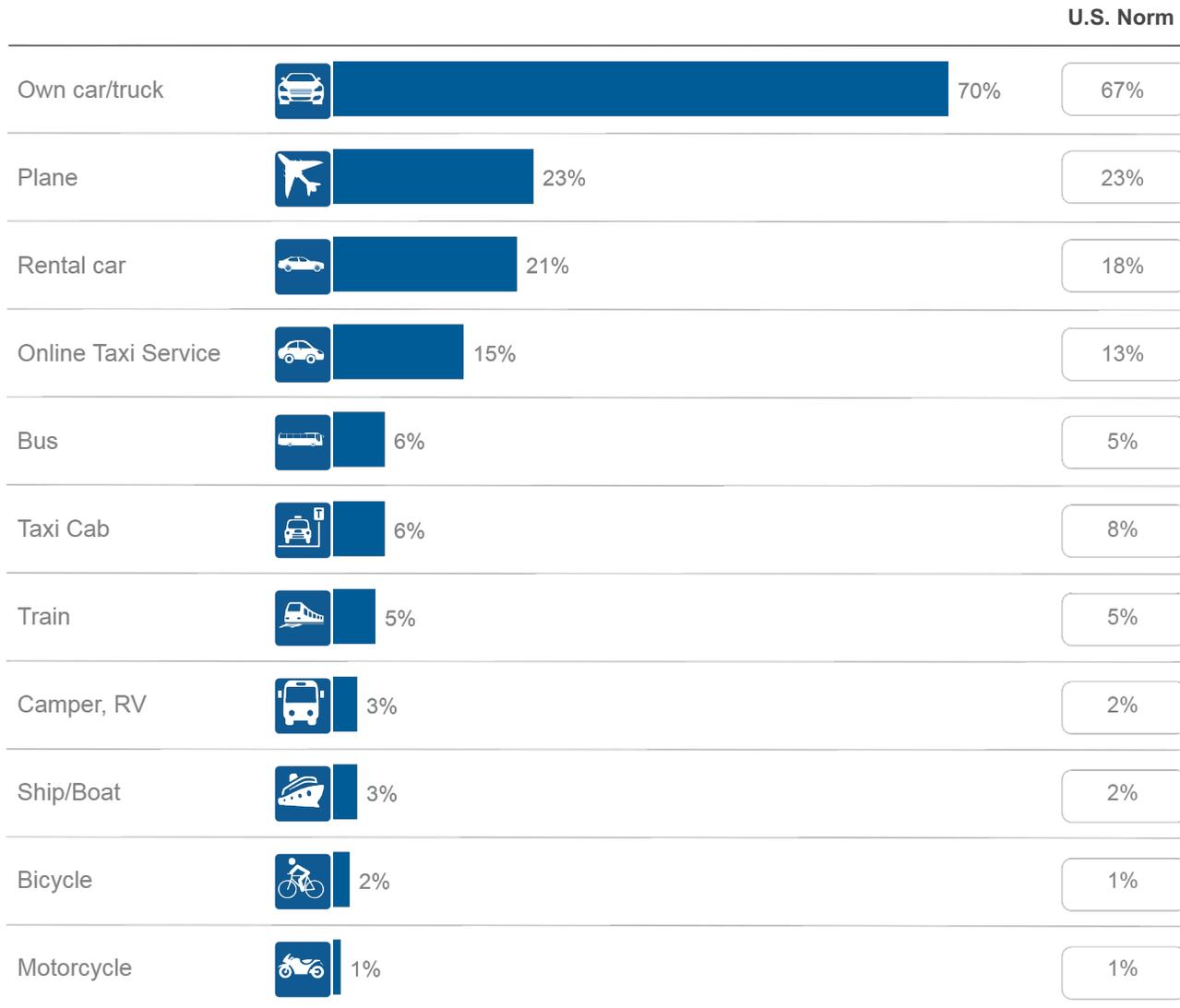
■ Jacksonville ■ U.S. Norm



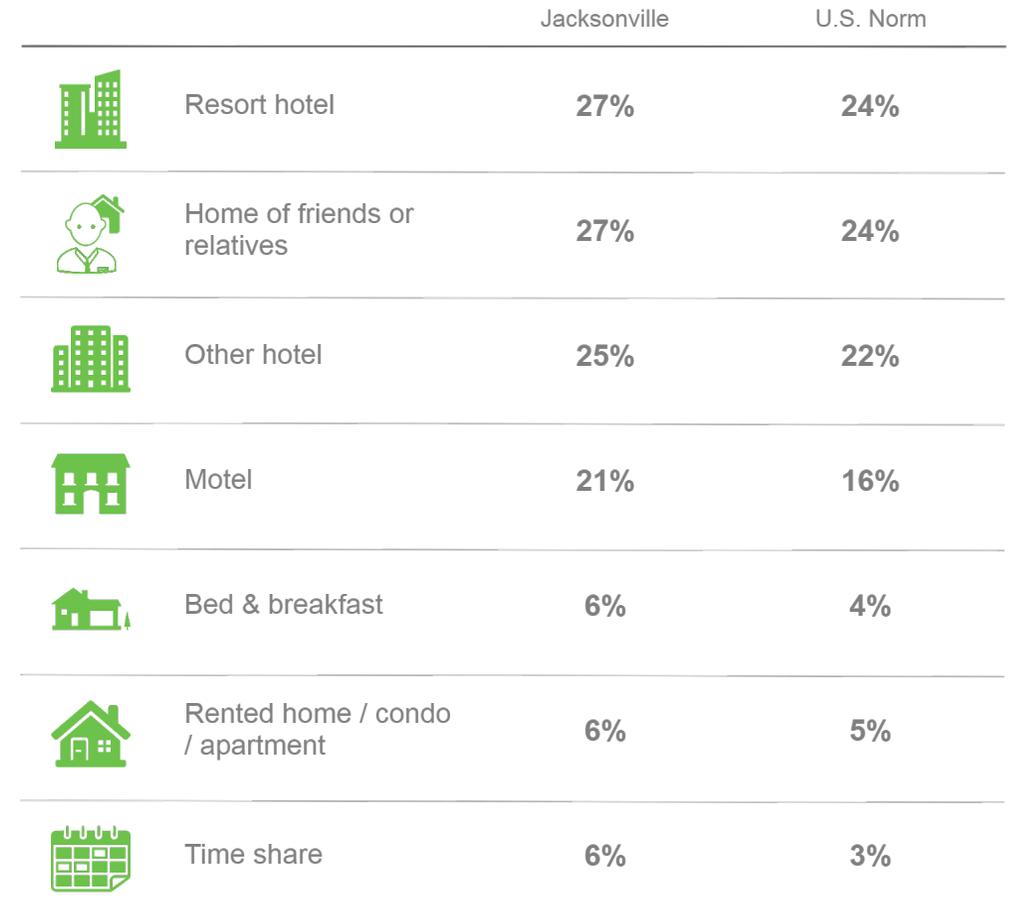
# Jacksonville's Overnight Trip Characteristics

Base: 2018 Overnight Person-Trips

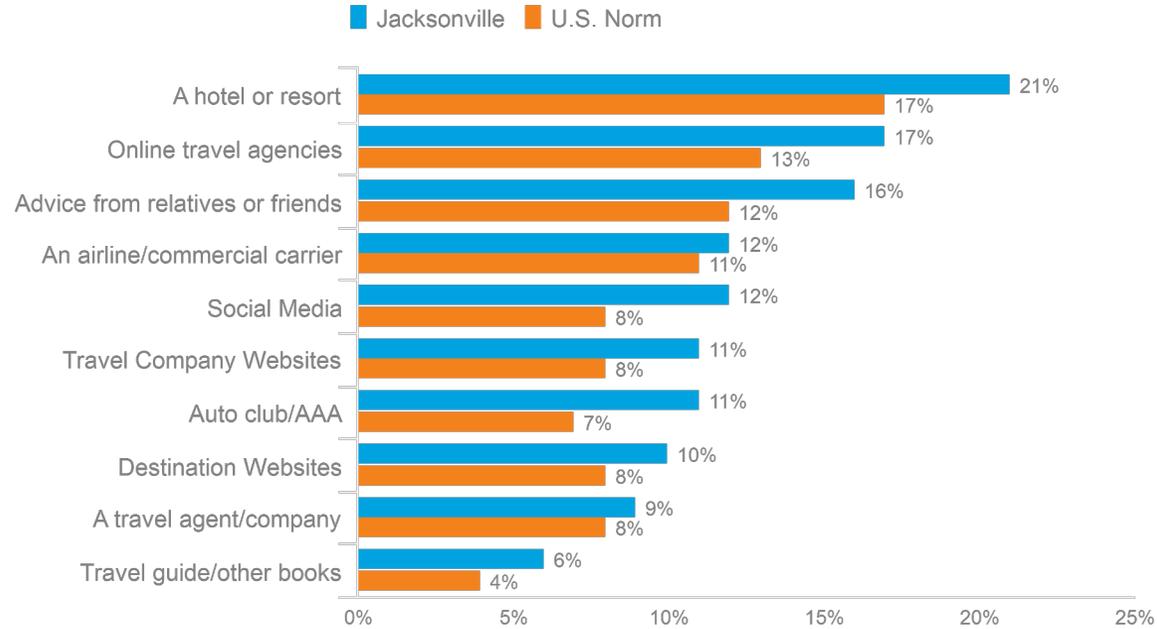
## Transportation



## Accommodations



## Trip Planning Information Sources



## Devices Used for Trip Planning

Device	Jacksonville	U.S. Norm
Any device	88%	84%
Laptop	46%	43%
Desktop/Home computer	43%	40%
Smartphone	40%	33%
Tablet	22%	17%

## Length of Trip Planning



### Jacksonville

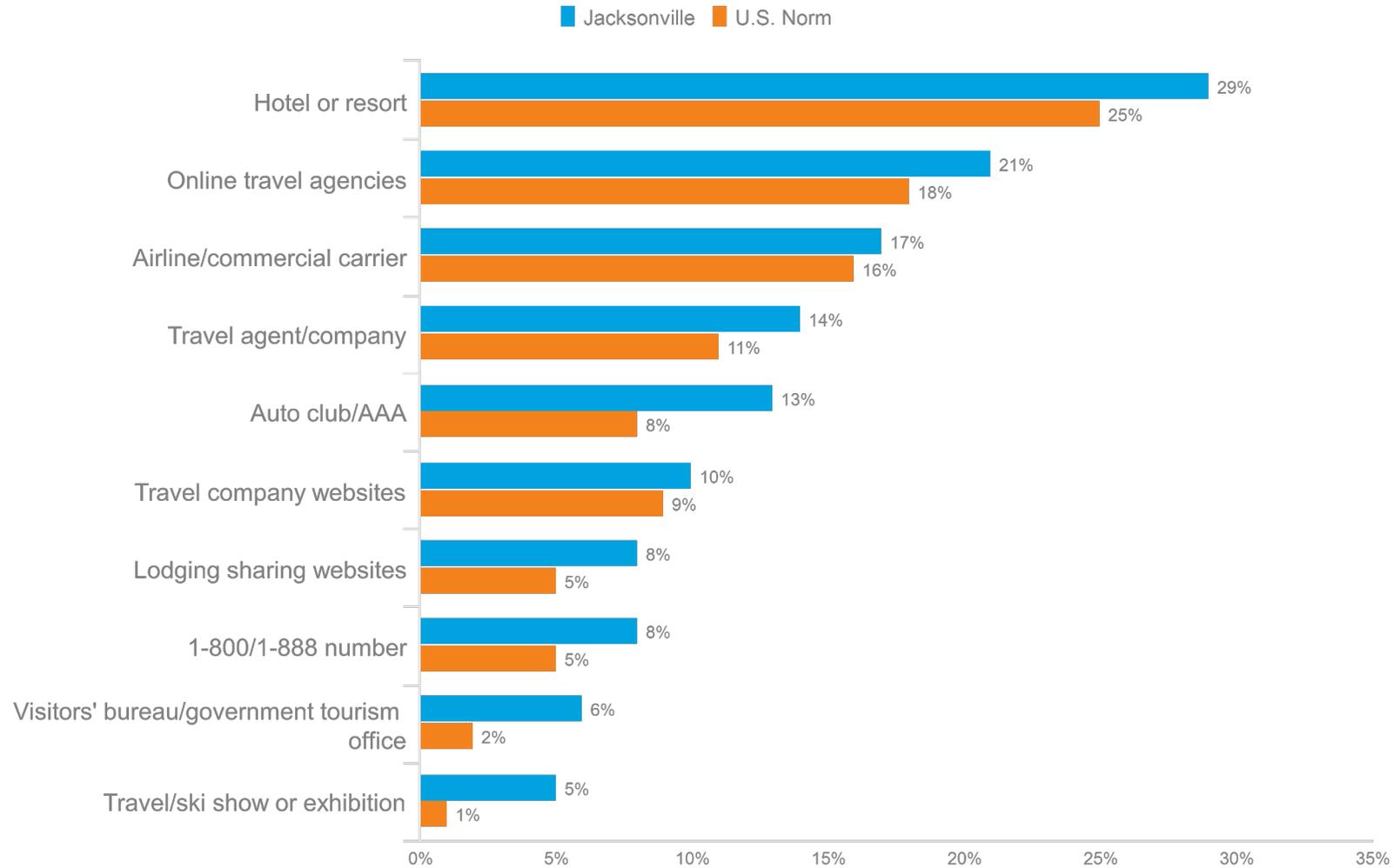
More than 1 year in advance	5%
6-12 months	15%
3-5 months	22%
2 months	16%
1 month or less	30%
Did not plan anything in advance	12%



### 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%

## Method of Booking



## Activities and Experiences (Top 10)

Shopping



**35%**

U.S. Norm  
30%

Beach/waterfront



**30%**

U.S. Norm  
13%

Swimming



**23%**

U.S. Norm  
14%

Bar/nightclub



**17%**

U.S. Norm  
15%

Theme park



**15%**

U.S. Norm  
7%

Landmark/historic site



**14%**

U.S. Norm  
12%

Fine/upscale dining



**14%**

U.S. Norm  
12%

National/state park



**10%**

U.S. Norm  
10%

Theater



**10%**

U.S. Norm  
6%

Museum



**10%**

U.S. Norm  
10%

## Activities of Special Interest (Top 5)

Jacksonville

Historic places	<b>25%</b>
Cultural activities/Attractions	<b>24%</b>
Exceptional Culinary Experiences	<b>17%</b>
Brewery Tours/Beer Tasting	<b>10%</b>
Winery Tours/Tasting	<b>9%</b>

## Activities of Special Interest (Top 5)

U.S. Norm

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

## Online Social Media Use by Travelers

	Jacksonville	U.S. Norm
 Used any social media	<b>67%</b>	<b>66%</b>
 Posted travel photos or video online	<b>29%</b>	<b>29%</b>
 Read travel reviews	<b>27%</b>	<b>26%</b>
 Looked at travel-related photos or video online	<b>23%</b>	<b>23%</b>
 Accessed travel deals, news, events, or promotions	<b>22%</b>	<b>20%</b>

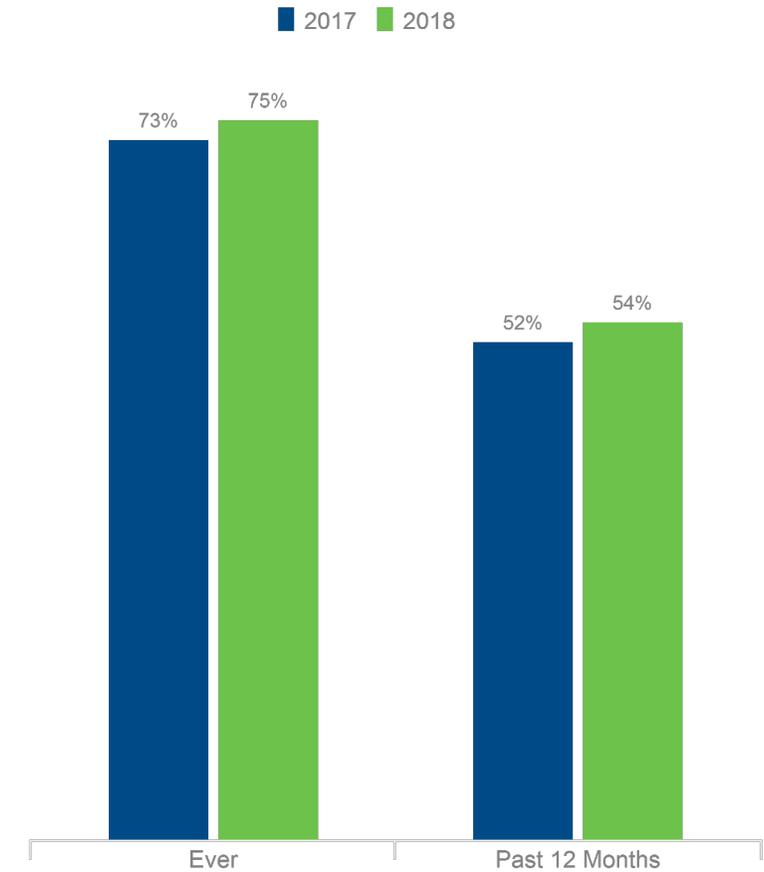
## Devices Using During Trip

	Jacksonville	U.S. Norm
 Any device	<b>89%</b>	<b>83%</b>
 Smartphone	<b>74%</b>	<b>68%</b>
 Laptop	<b>36%</b>	<b>31%</b>
 Tablet	<b>30%</b>	<b>26%</b>

## % Very Satisfied with Trip

	Overall trip experience	★★★★★☆☆☆☆	65%
	Quality of food	★★★★★☆☆☆☆	60%
	Quality of accommodations	★★★★★☆☆☆☆	59%
	Friendliness of people	★★★★★☆☆☆☆	59%
	Safety and Security	★★★★★☆☆☆☆	56%
	Cleanliness	★★★★★☆☆☆☆	56%
	Value for money	★★★★★☆☆☆☆	50%
	Sightseeing and attractions	★★★★★☆☆☆☆	48%
	Music/nightlife/entertainment	★★★★☆☆☆☆☆☆	41%

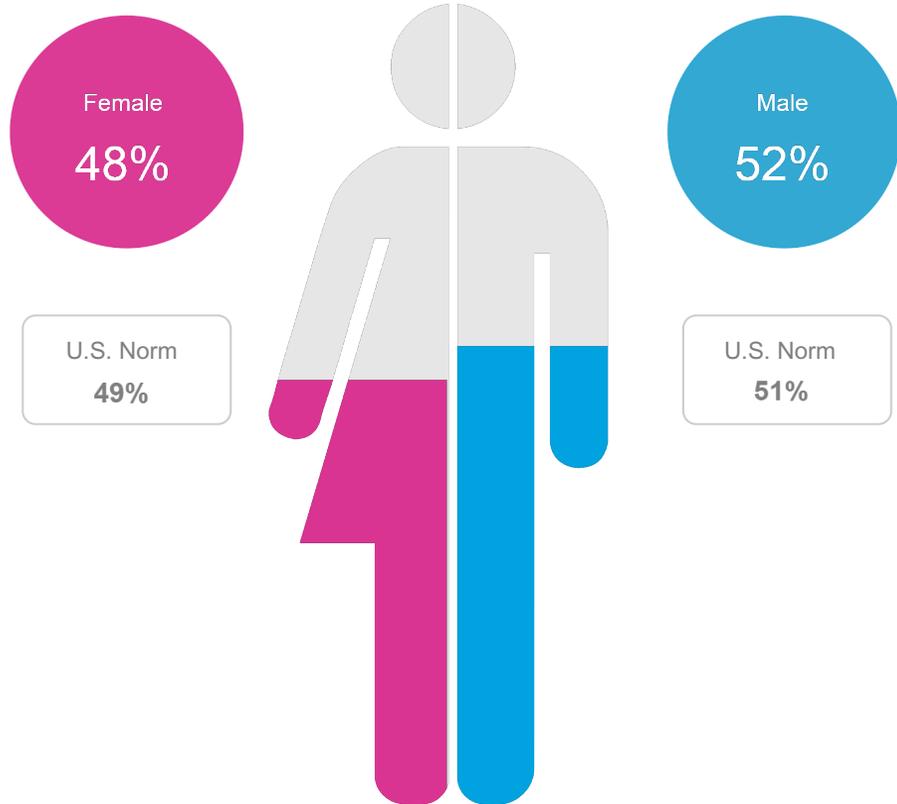
## Past Visitation to Jacksonville



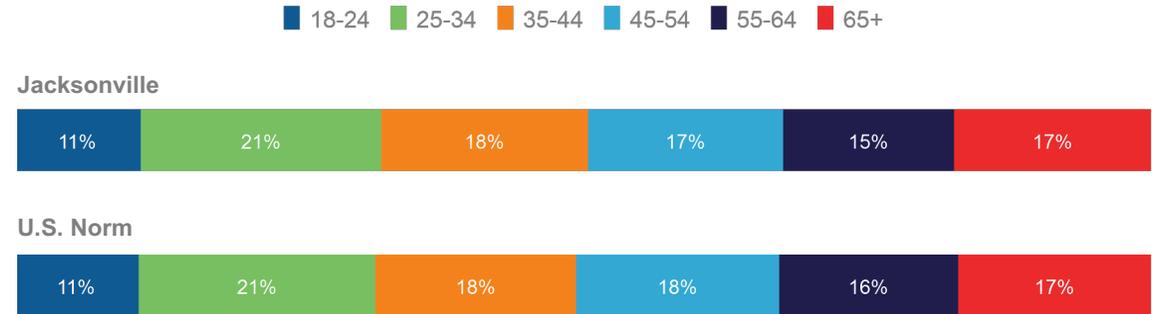
# Demographic Profile of Overnight Jacksonville Visitors

Base: 2018 Overnight Person-Trips

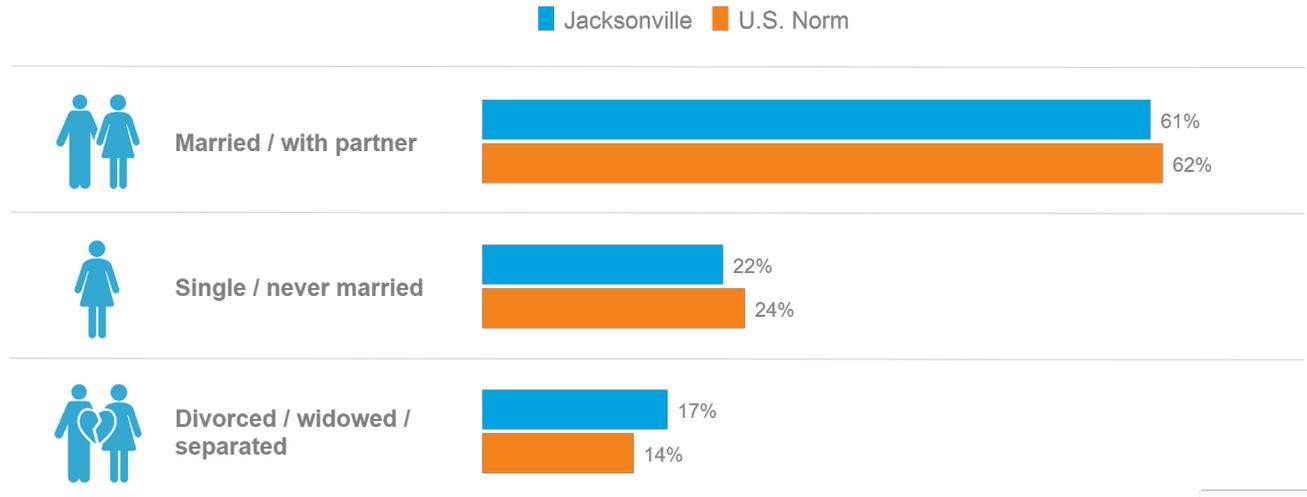
## Gender



## Age



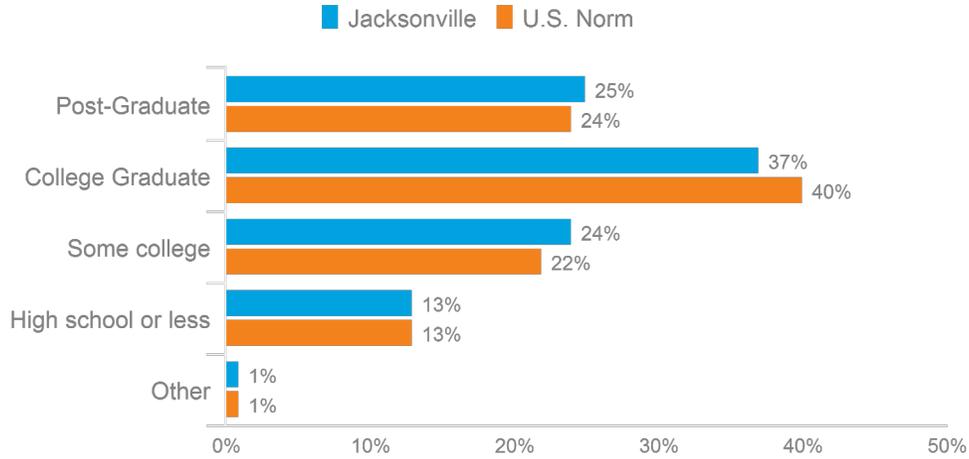
## Marital Status



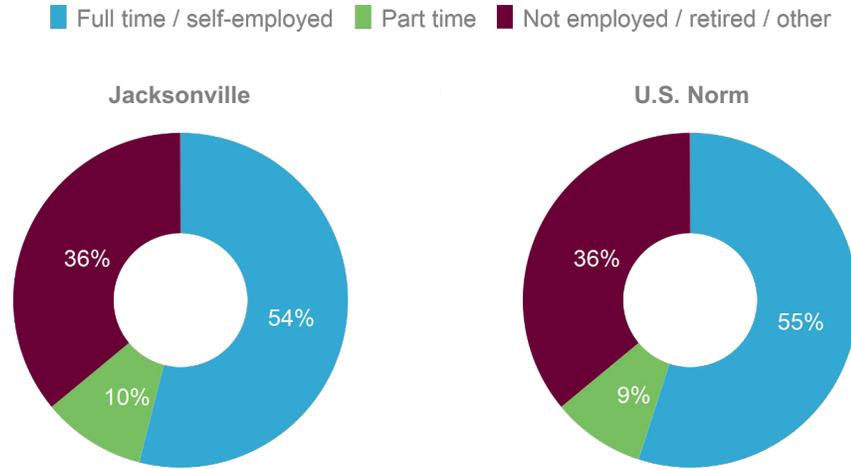
# Demographic Profile of Overnight Jacksonville Visitors

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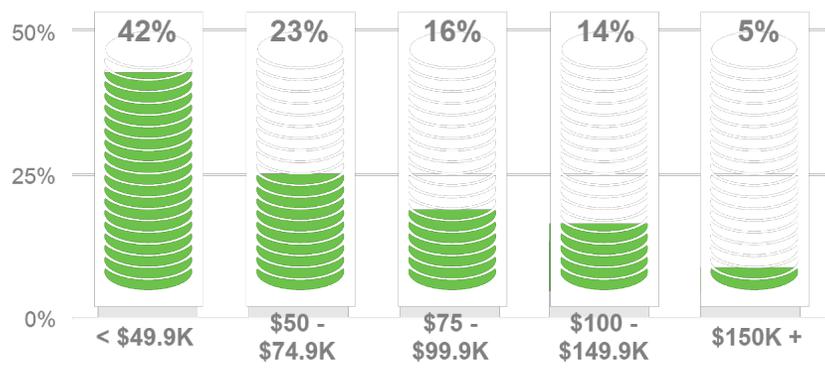
## Education



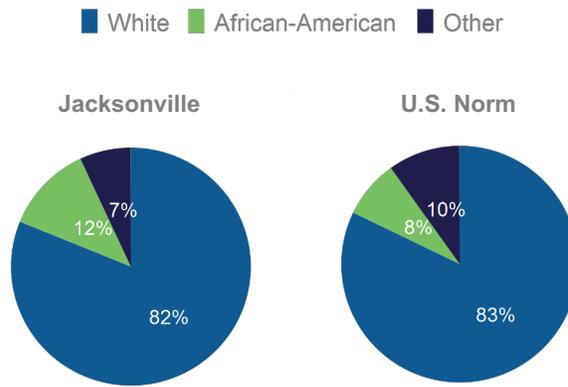
## Employment



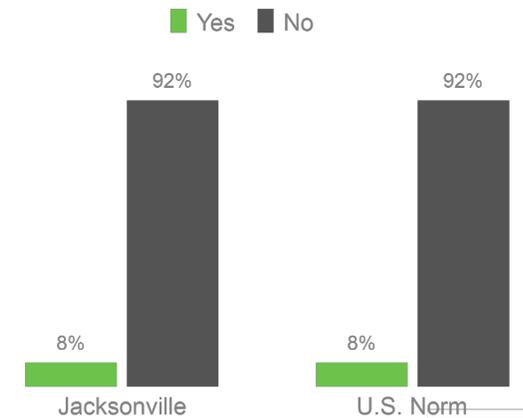
## Household Income



## Race

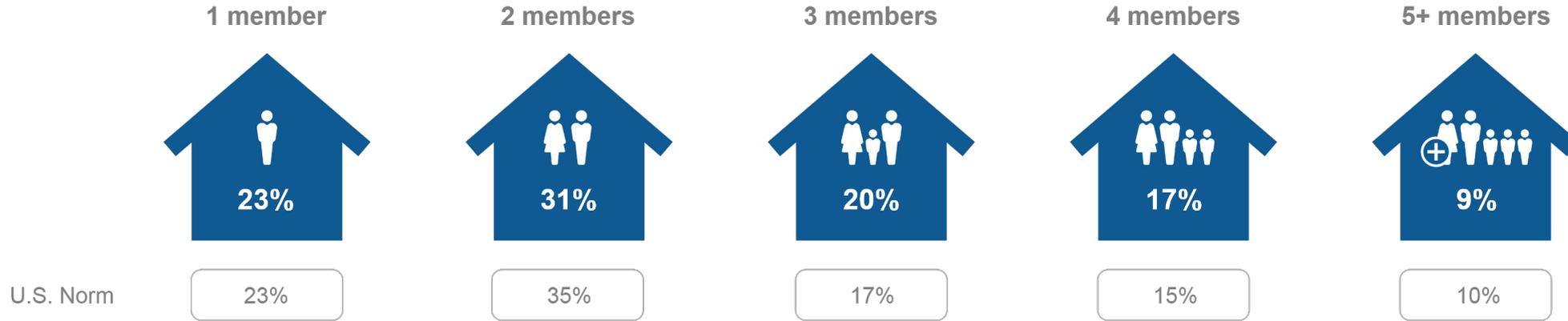


## Hispanic Background

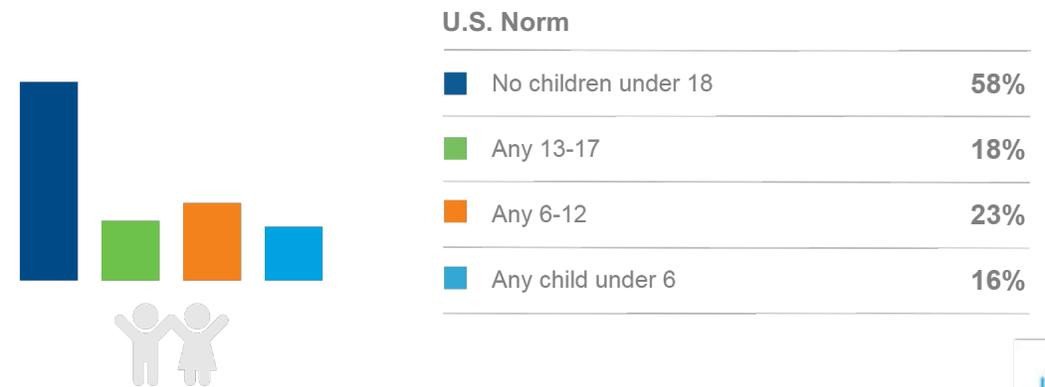
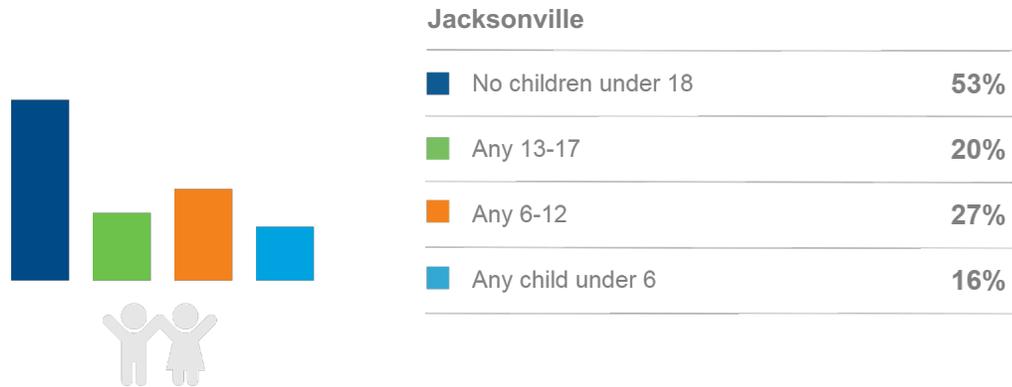


U.S. Norm    38%    22%    16%    16%    7%

## Household Size



## Children in Household





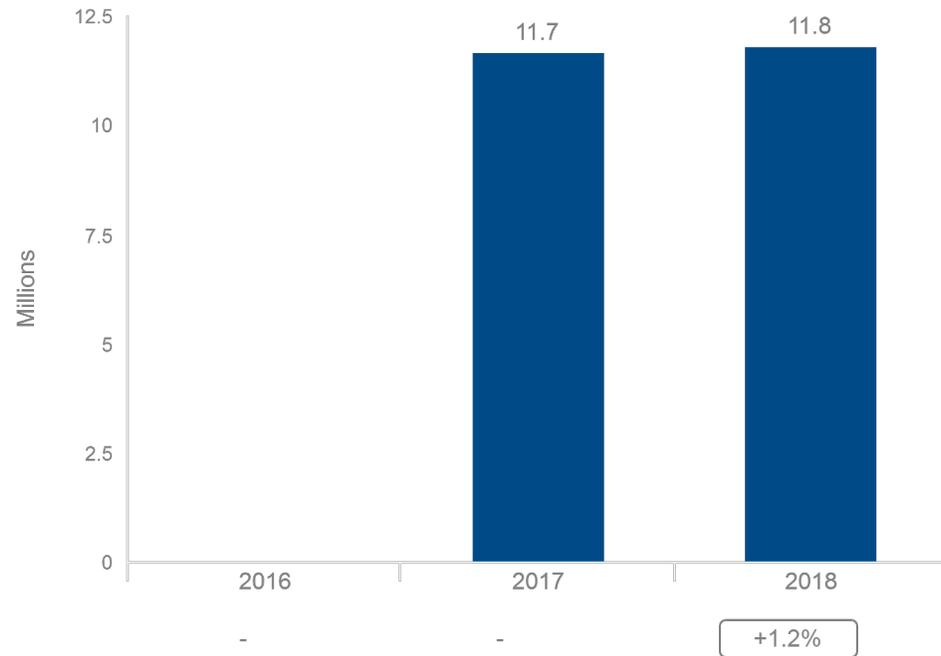
# Jacksonville Day Visitor Research

**Travel USA®**



Prepared for  
Visit Jacksonville  
July 2019

## Day Trips to Jacksonville



## Total Size of Jacksonville 2018 Domestic Travel Market

Total Person-Trips  
**22.2 Million**  
+1.3% vs. last year

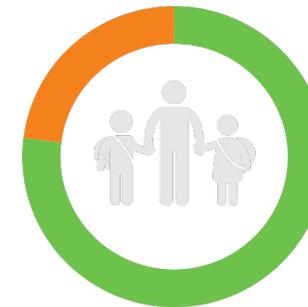


Day  
53% | 11.8 Million

Overnight  
47% | 10.4 Million

## Size of Jacksonville Day Travel Market - Adults vs. Children

Total Day Person-Trips  
**11.8 Million**



Adults  
77% | 9.1 Million

Children  
23% | 2.7 Million

## Domestic Day Expenditures - by Sector

Total Spending

**\$0.745 Billion**

+3.6% vs. last year

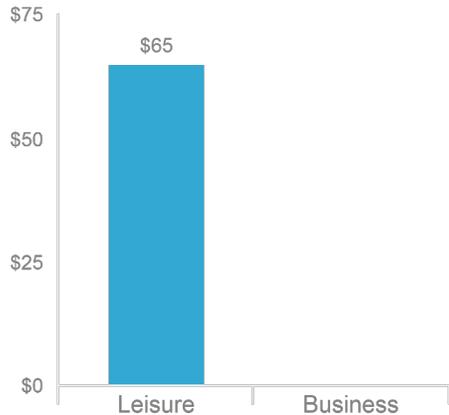


- Lodging  
- | \$-
- Transportation at Destination  
22% | \$161 Million
- Restaurant Food & Beverage  
33% | \$244 Million
- Retail Purchase  
29% | \$217 Million
- Recreation/Entertainment  
16% | \$122 Million

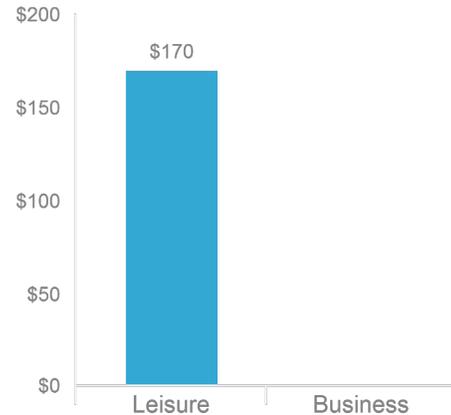
## Average Per Person Expenditures on Domestic Day Trips - by Sector



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



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



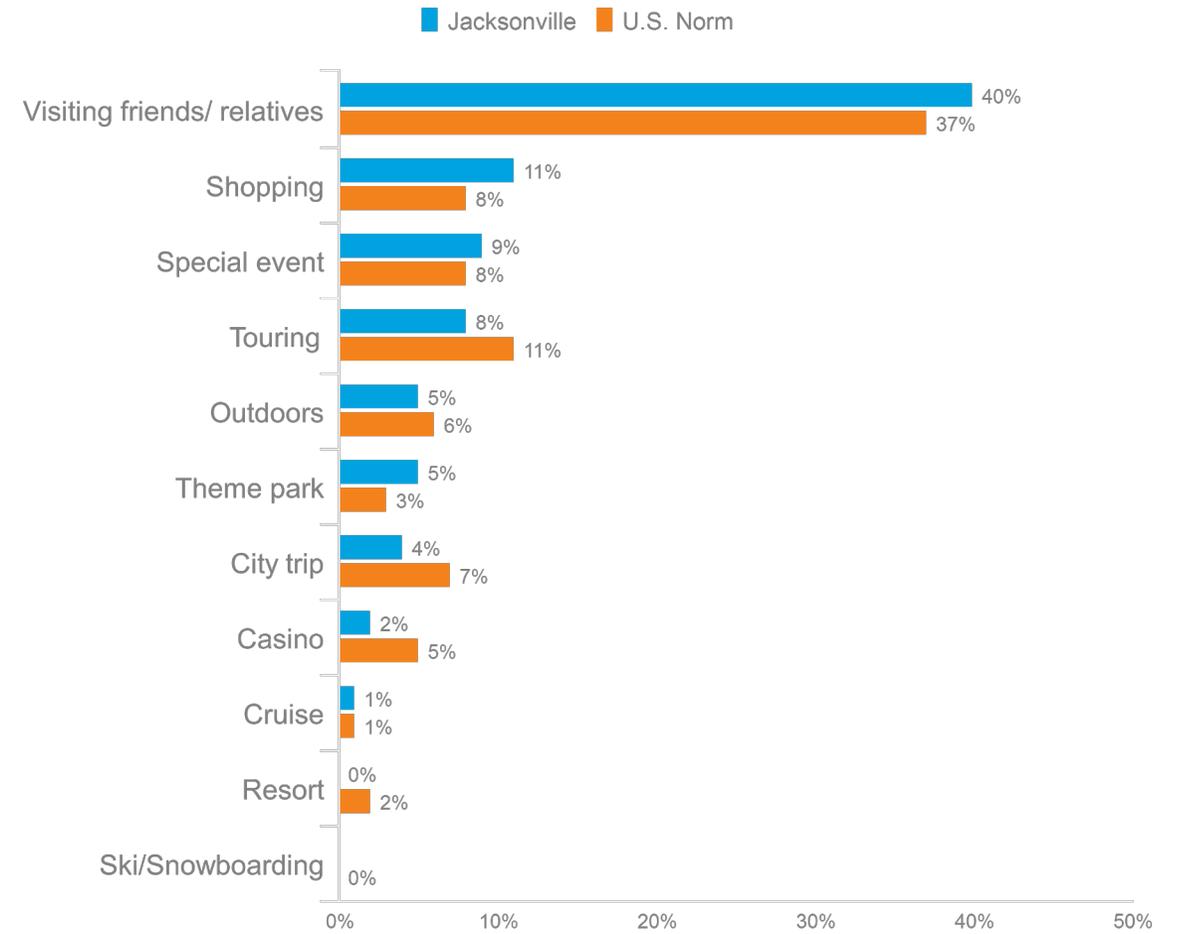
## Average Per Party Expenditures on Domestic Day Trips - by Sector



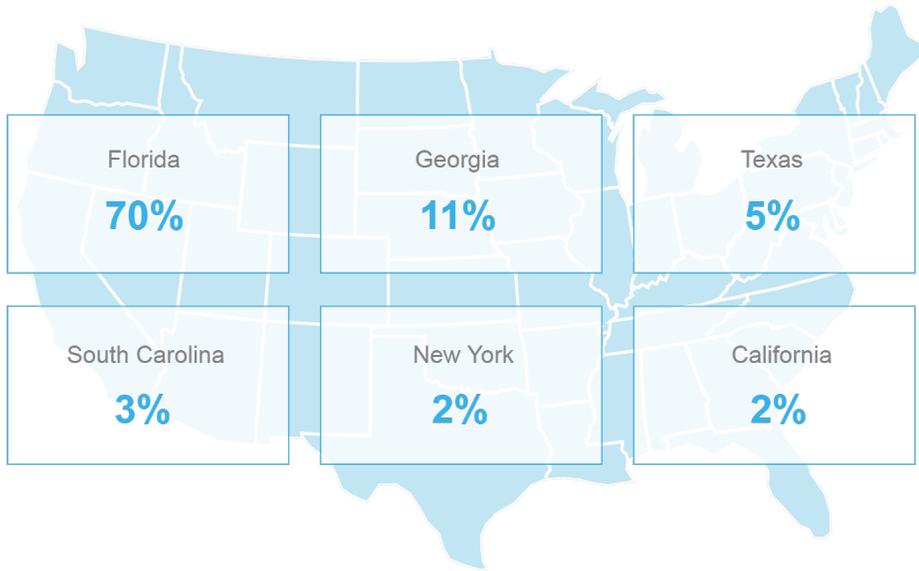
## Main Purpose of Trip



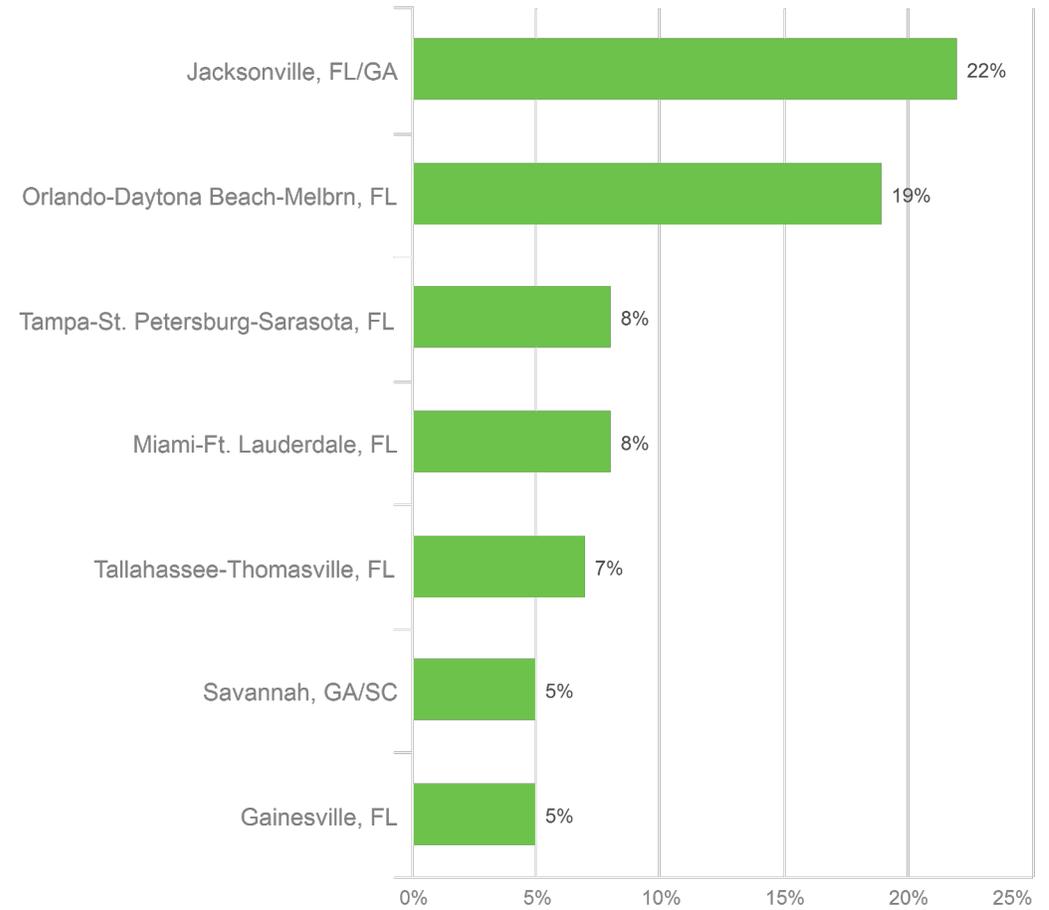
## Main Purpose of Leisure Trip



## State Origin Of Trip



## DMA Origin Of Trip

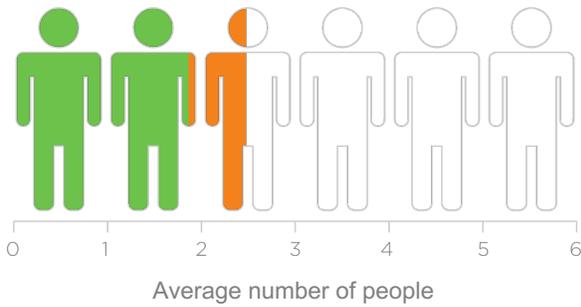


## Season of Trip



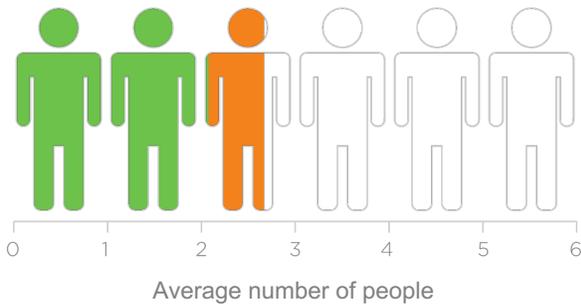
## Size of Travel Party

### Jacksonville



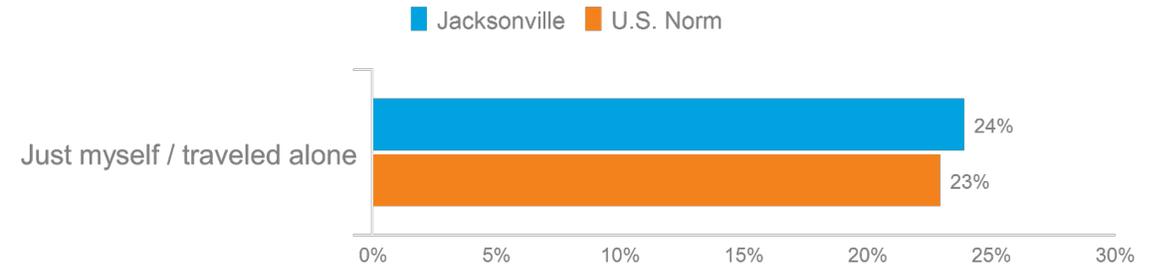
Total  
**2.5**

### U.S. Norm

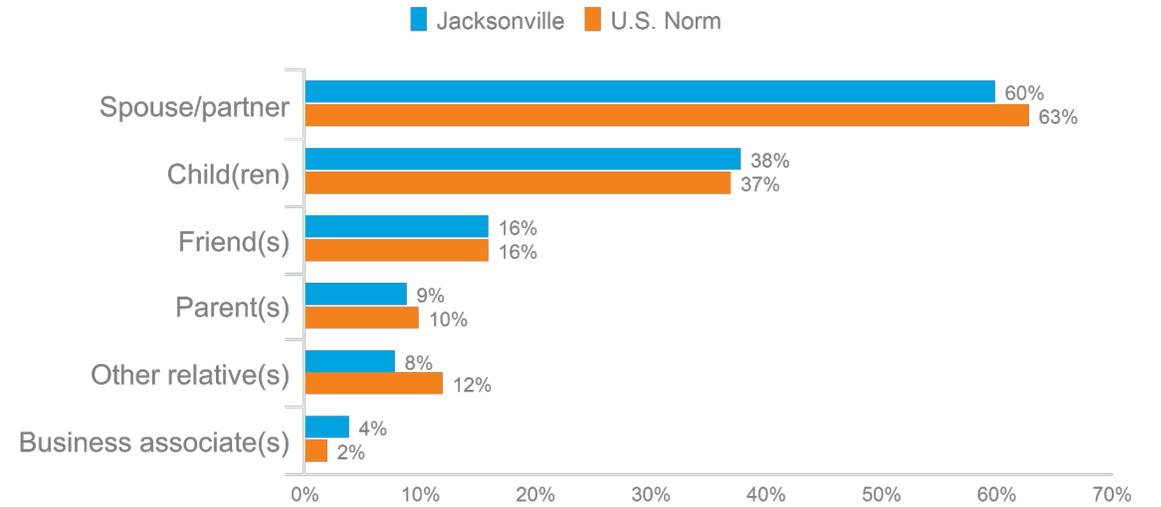


Total  
**2.6**

## Percent Who Traveled Alone



## Composition of Immediate Travel Party



## Activities and Experiences (Top 10)

Shopping



**36%**

U.S. Norm  
25%

Beach/waterfront



**17%**

U.S. Norm  
7%

Swimming



**10%**

U.S. Norm  
5%

Zoo



**8%**

U.S. Norm  
4%

Museum



**7%**

U.S. Norm  
7%

Bar/nightclub



**7%**

U.S. Norm  
5%

Landmark/historic site



**6%**

U.S. Norm  
7%

Theme park



**6%**

U.S. Norm  
5%

Fair/exhibition/festival



**5%**

U.S. Norm  
3%

Fine/upscale dining



**5%**

U.S. Norm  
6%

## Activities of Special Interest (Top 5)

Jacksonville

Historic places	<b>22%</b>
Cultural activities/Attractions	<b>14%</b>
Exceptional Culinary Experiences	<b>10%</b>
Religious Travel	<b>7%</b>
Medical Tourism	<b>5%</b>

## Activities of Special Interest (Top 5)

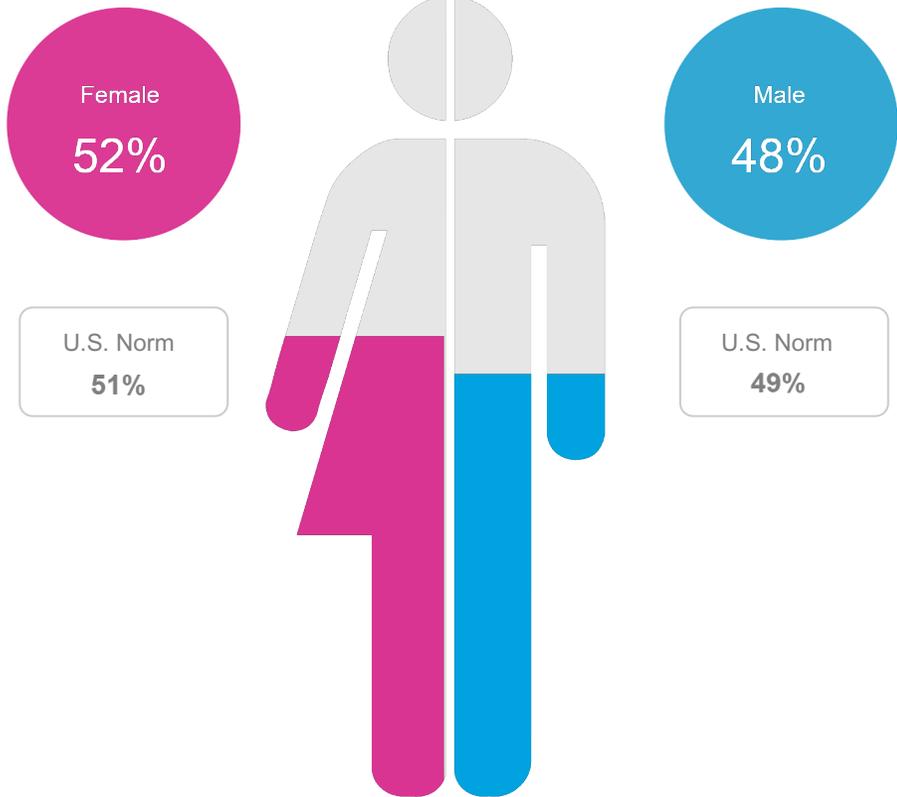
U.S. Norm

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Winery Tours/Tasting	<b>5%</b>

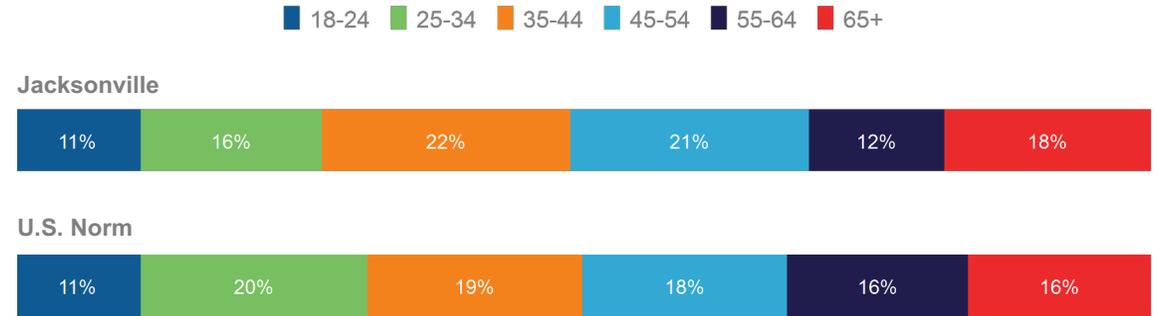
## Online Social Media Use by Travelers

	Jacksonville	U.S. Norm
 Used any social media	<b>78%</b>	<b>66%</b>
 Posted travel photos or video online	<b>29%</b>	<b>27%</b>
 Accessed travel deals, news, events, or promotions	<b>28%</b>	<b>21%</b>
 Looked at travel-related photos or video online	<b>27%</b>	<b>24%</b>
 Read travel reviews	<b>26%</b>	<b>25%</b>

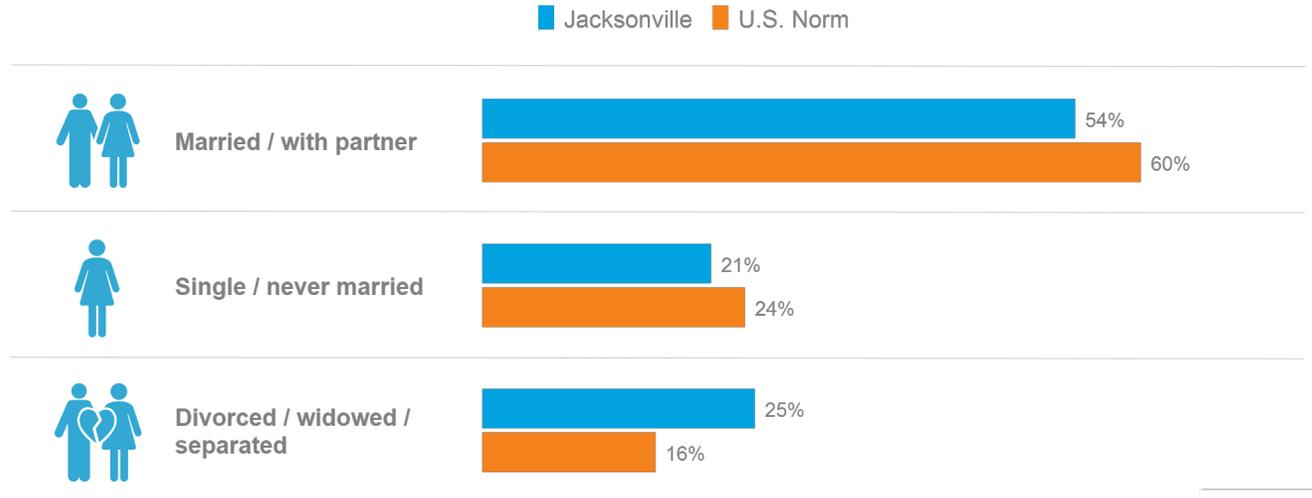
## Gender



## Age



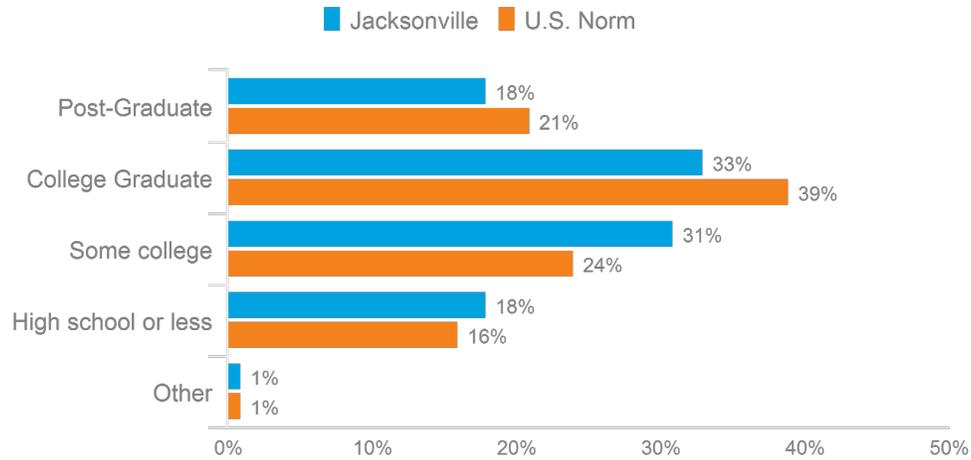
## Marital Status



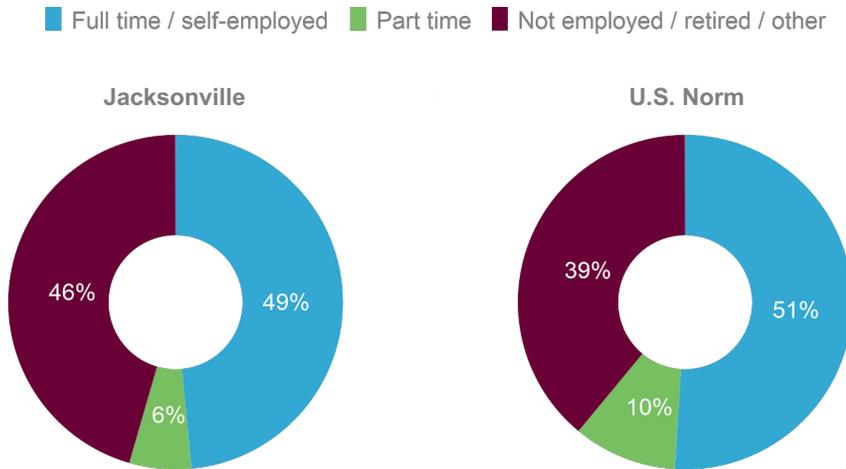
# Demographic Profile of Day Jacksonville Visitors

Base: 2018 Day Person-Trips

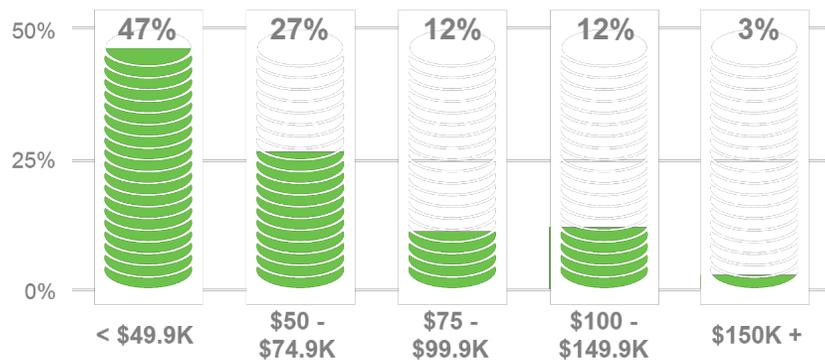
## Education



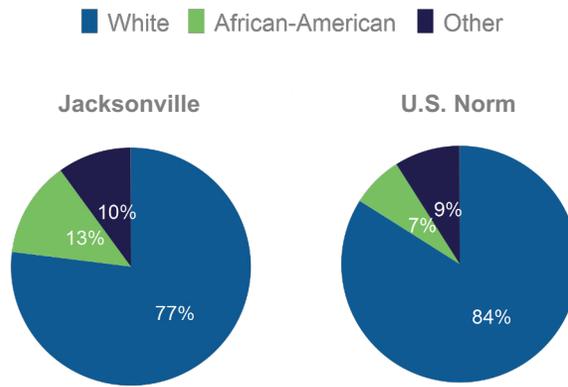
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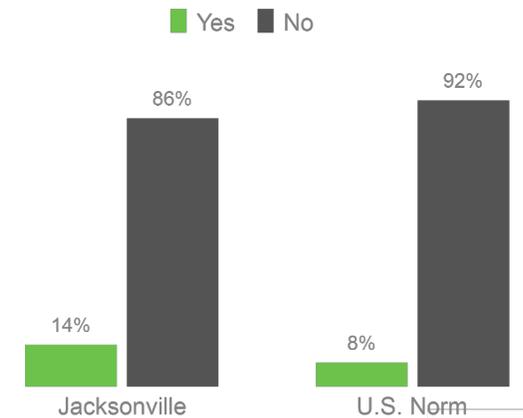
## Household Income



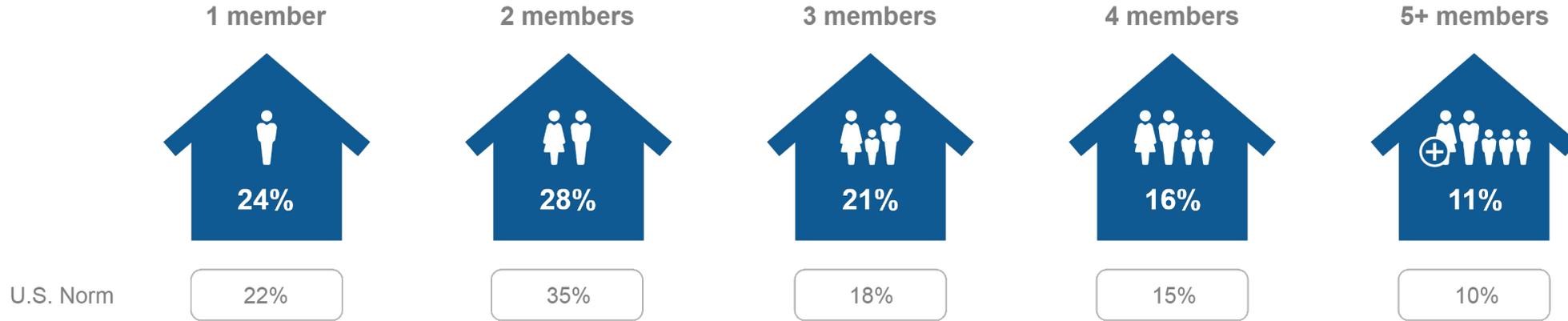
## Race



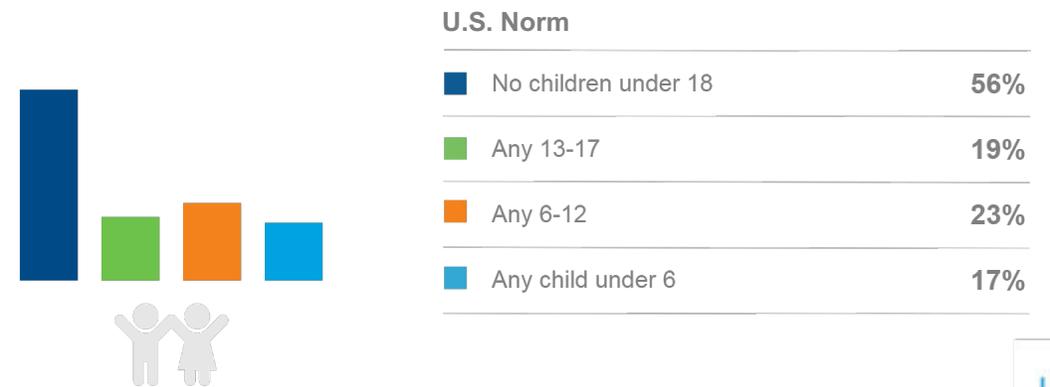
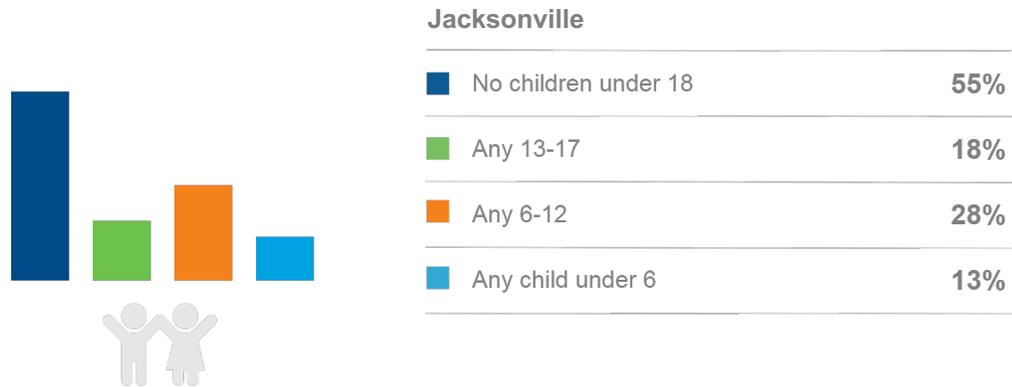
## Hispanic Background



## Household Size



## Children in Household





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