



Jacksonville

2013 Visitor Report

October 2014

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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 ever 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 2013.

Methodology



- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.
- For the 2013 travel year, this yielded :
 - 229,726 trips for analysis nationally:
 - 153,730 overnight trips
 - 75,996 day trips
- For Jacksonville, the following sample was achieved in 2013:
 - 809 trips:
 - 597 overnight trips
 - 212 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

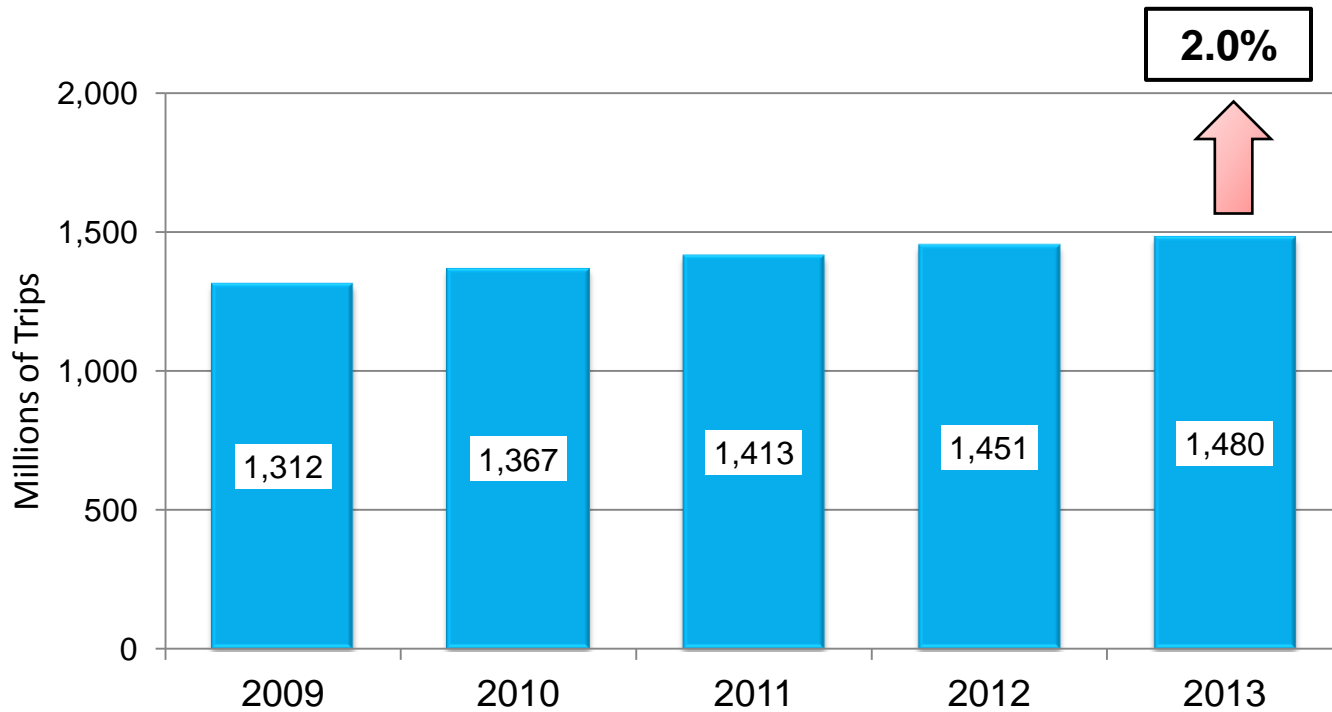


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2009-2013



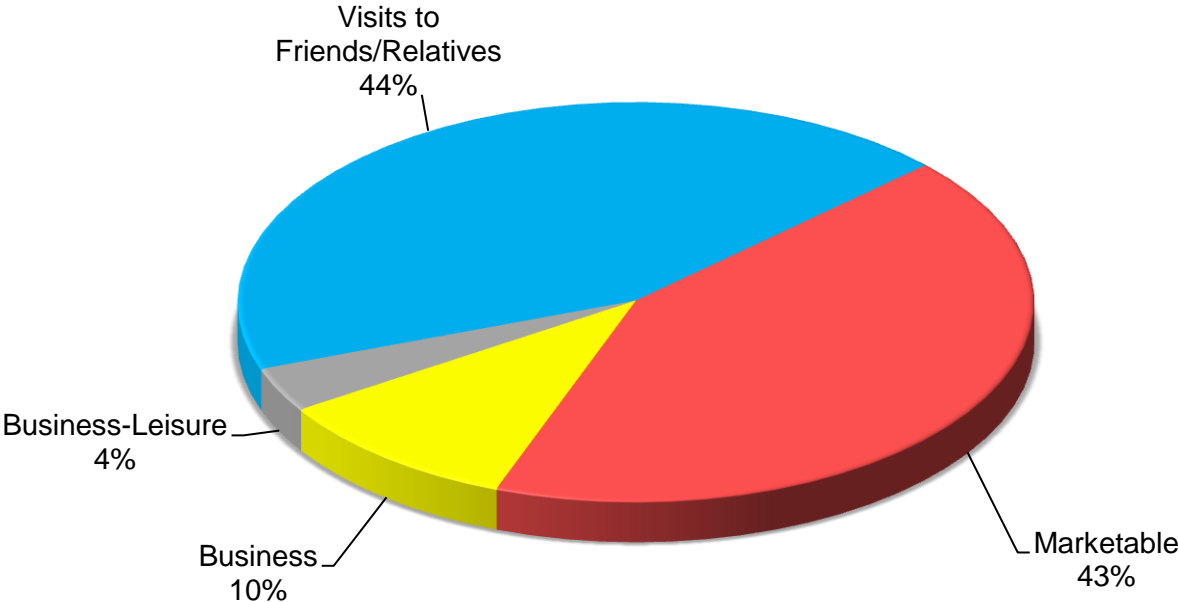
Base: Total Overnight Trips



Structure of the U.S. Travel Market — 2013 Overnight Trips



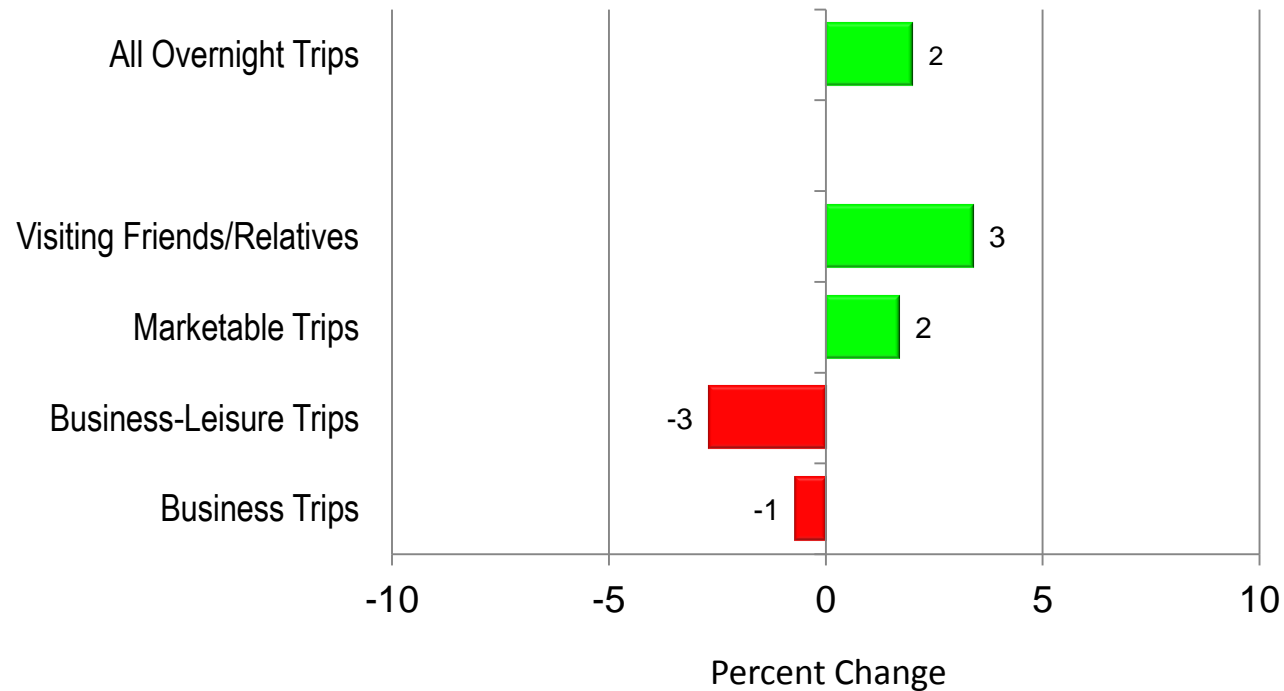
Base: Adult Overnight Trips



U.S. Market Trends for Overnight Trips — 2013 vs. 2012



Base: Overnight Trips



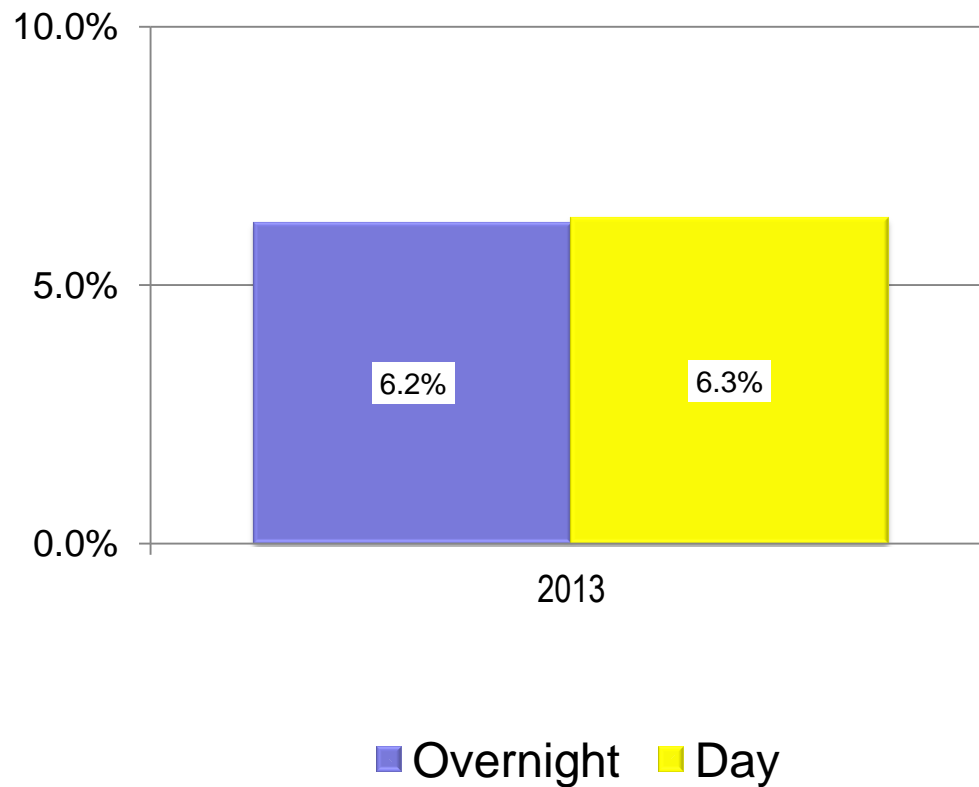


Size & Structure of Jacksonville's Travel Market

Jacksonville's Share of Adult Domestic Trips



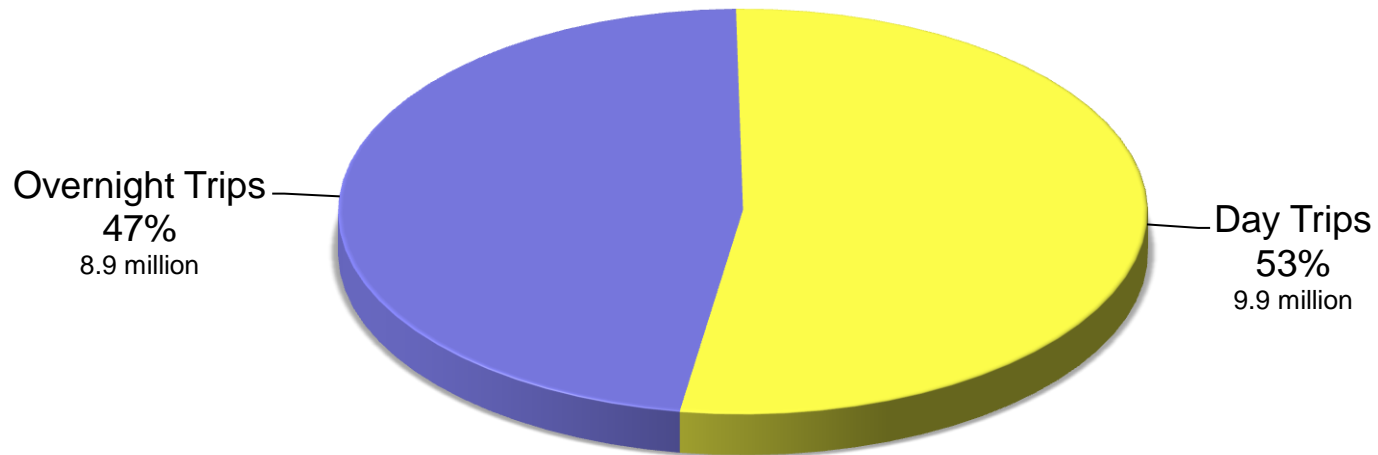
Base: Adult Person-Trips



Total Size of Jacksonville's Travel Market



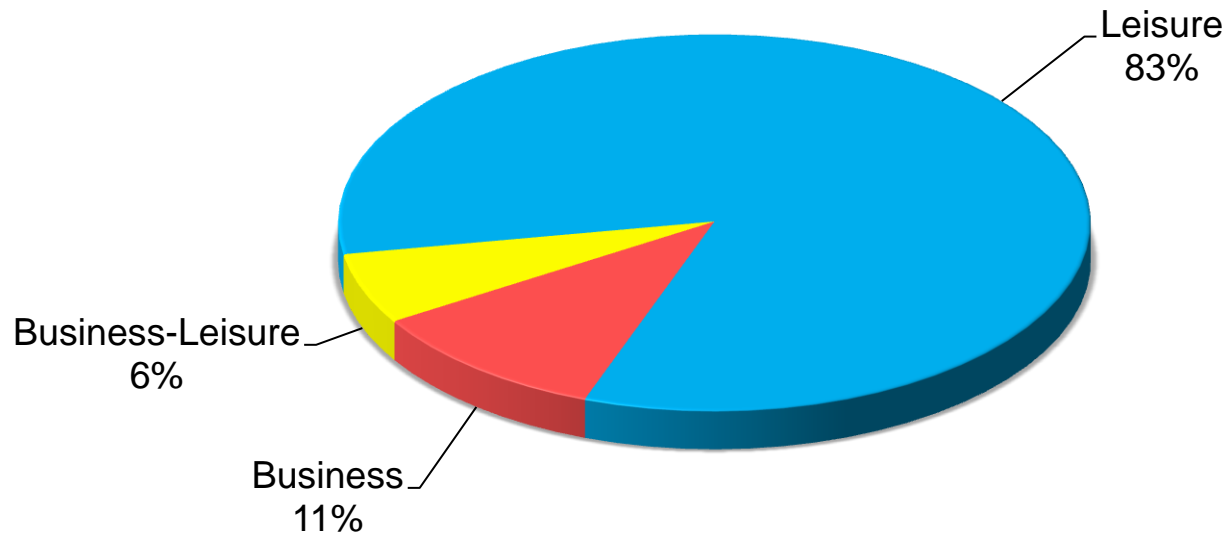
Total Person-Trips = 18.8 Million



Jacksonville's Overnight Travel Market — by Trip Segment



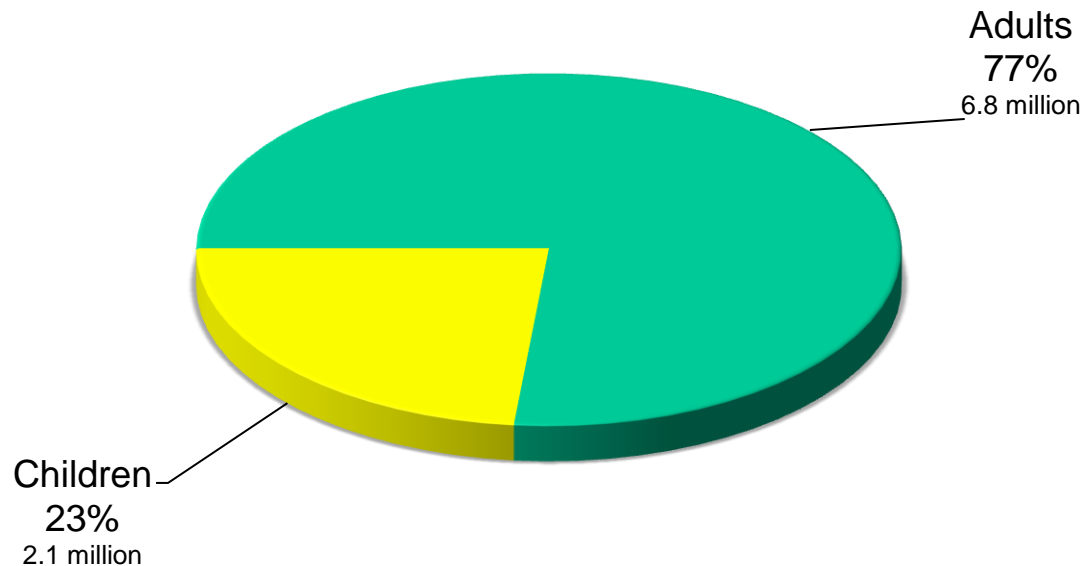
Total Overnight Person-Trips = 8.9 Million



Jacksonville's Total Overnight Travel Market — Adults vs. Children



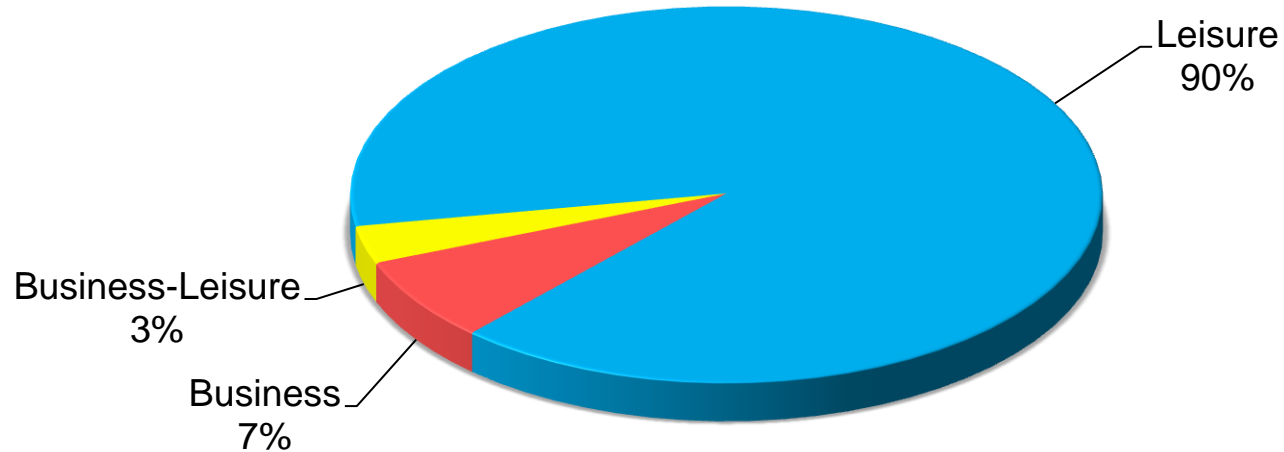
Total Overnight Person-Trips = 8.9 Million



Jacksonville's Day Travel Market — by Trip Segment



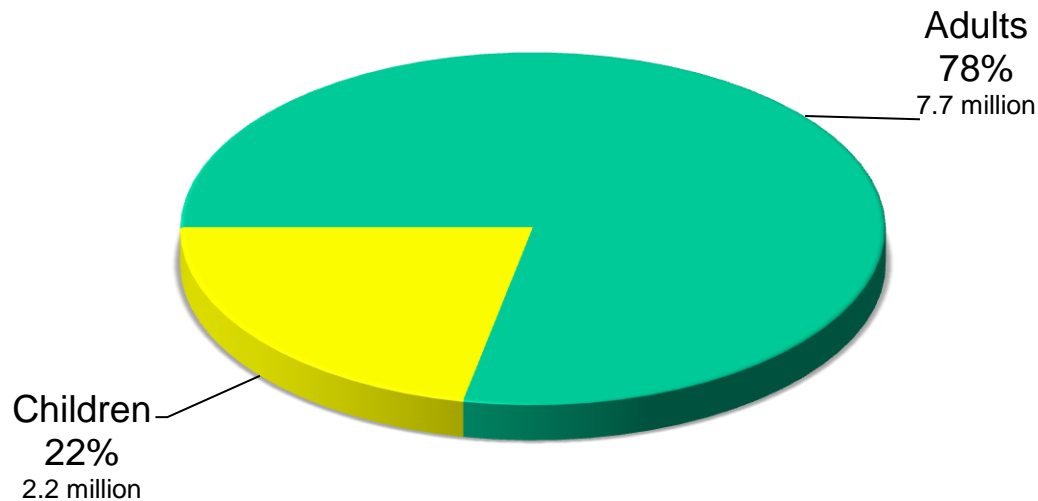
Total Day Person-Trips = 9.9 Million



Size of Jacksonville's Day Travel Market — Adults vs. Children



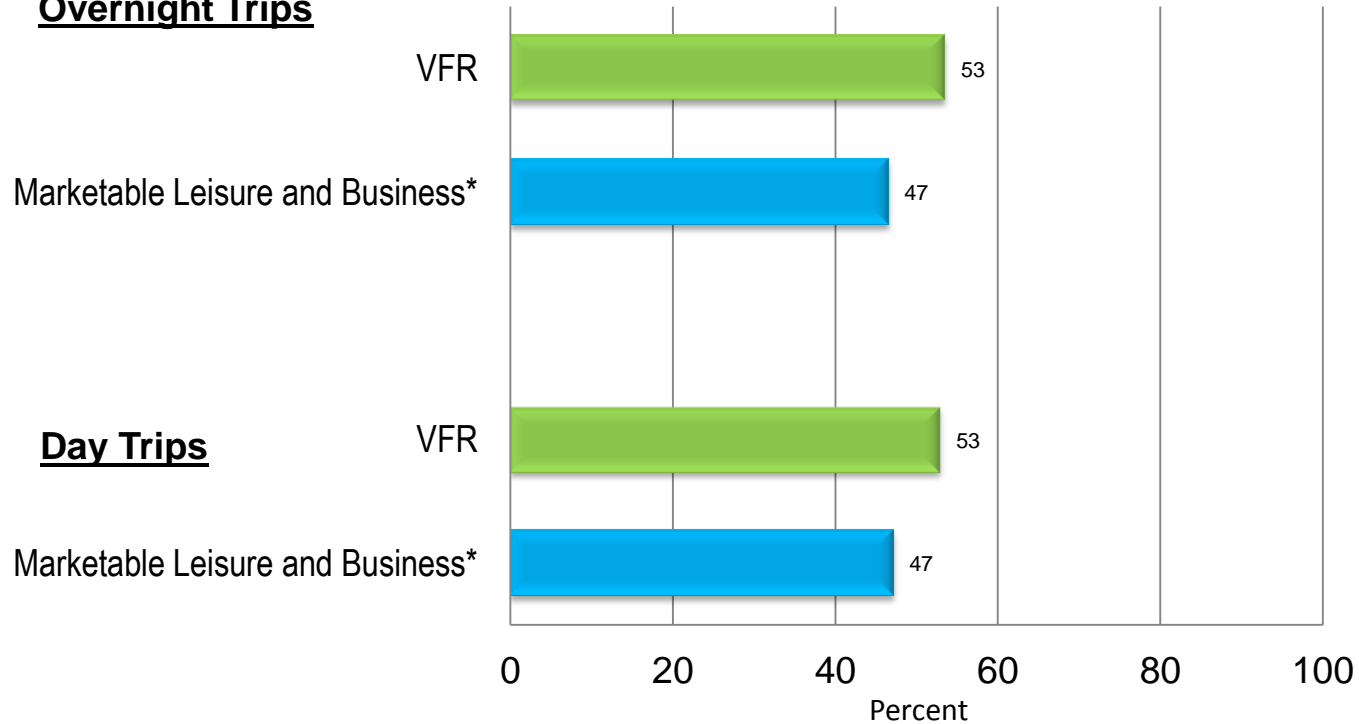
Total Day Person-Trips = 9.9 Million



Jacksonville VFR vs. Commercial* Segments



Overnight Trips



*All trips, excluding visits to friends and relatives.



Overnight Trip Detail

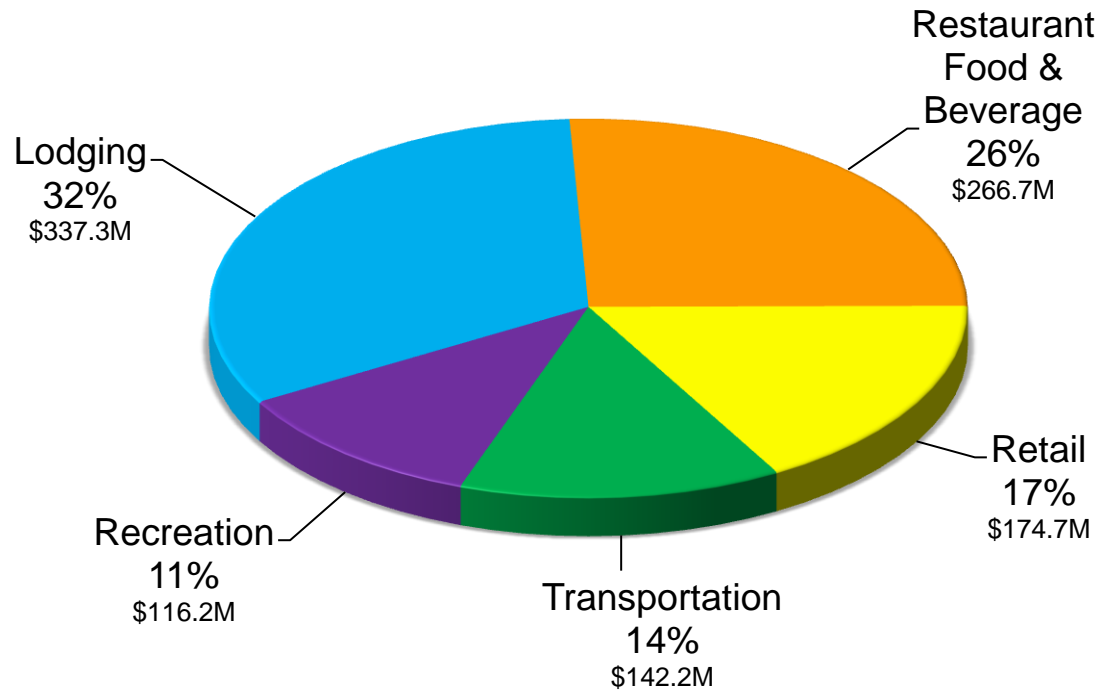


Overnight Expenditures

Total Overnight Spending — by Sector



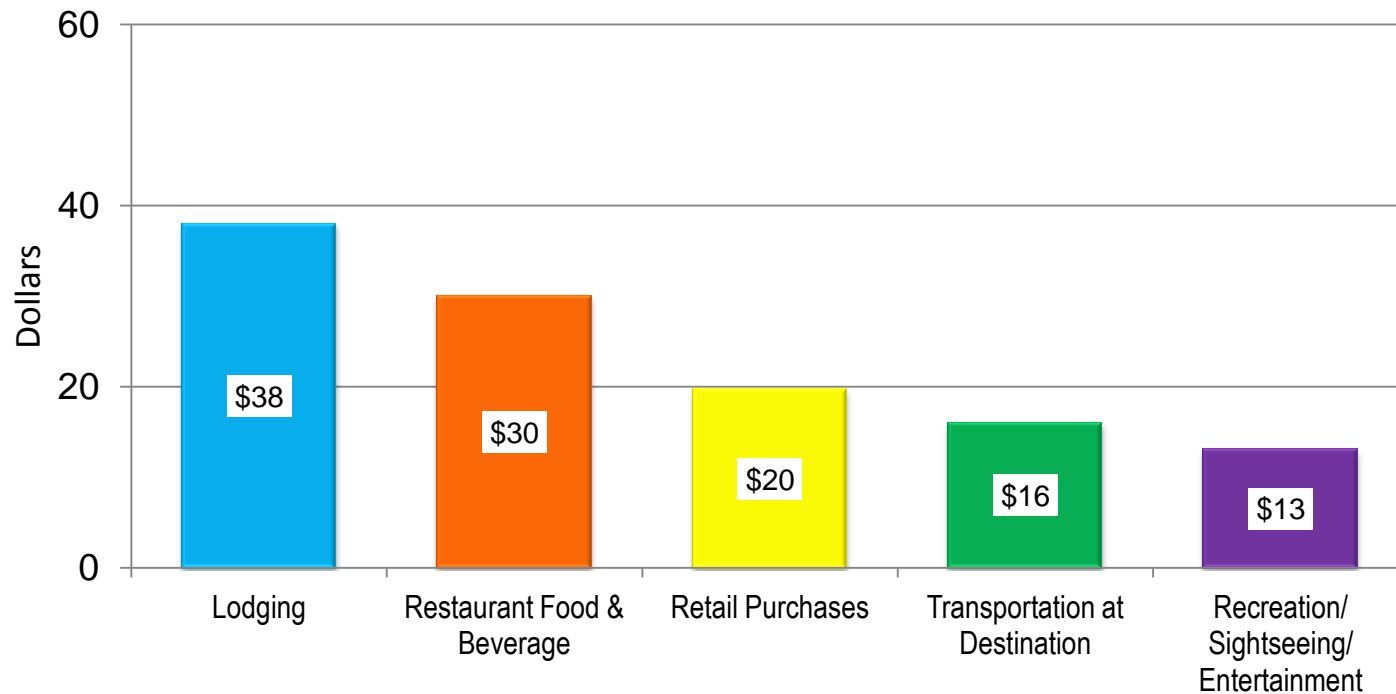
Total Spending = \$1.0 Billion



Average Per Person Expenditures on Overnight Trips — By Sector



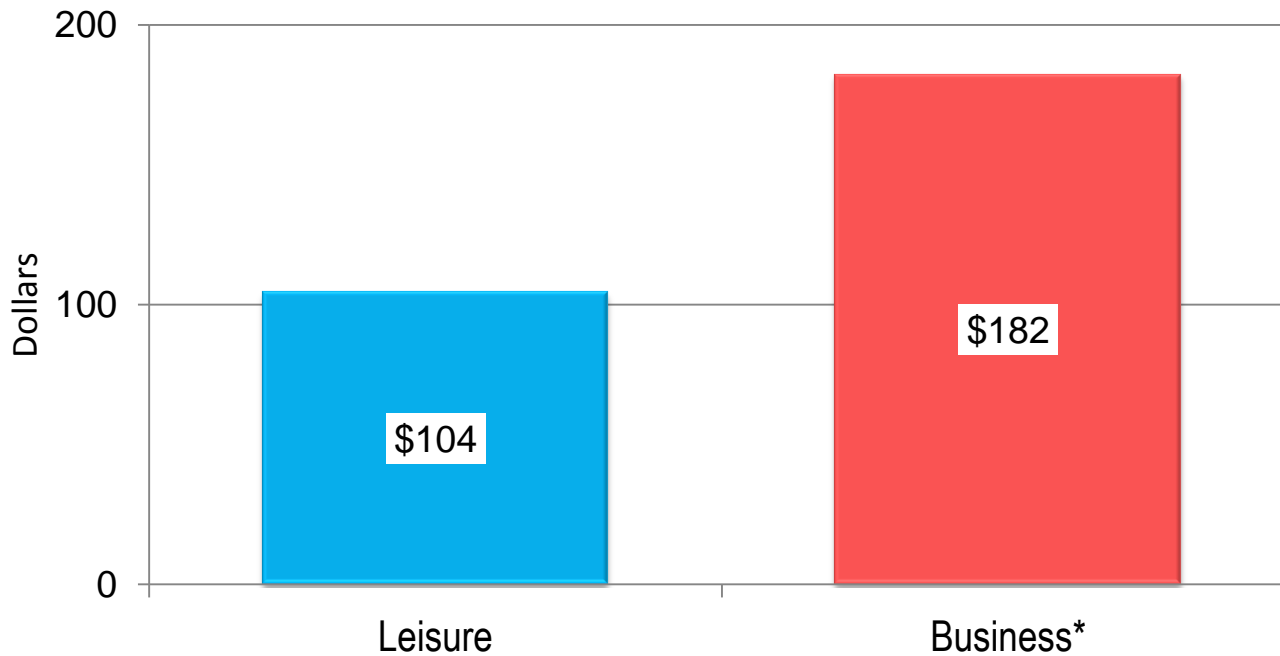
Base: Total Overnight Person-Trips



Average Per Person Expenditures on Overnight — by Trip Purpose



Base: Total Overnight Person-Trips

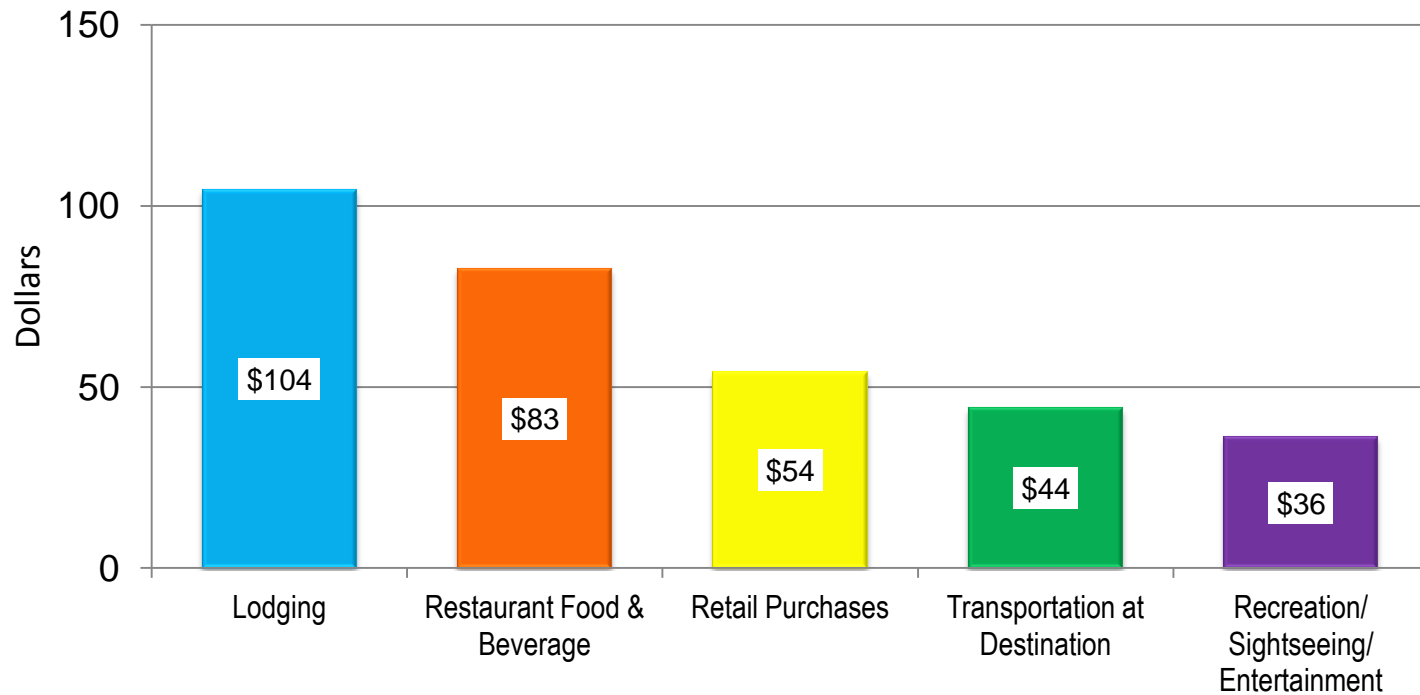


* Caution: Low base

Average Per Party Expenditures on Overnight Trips — By Sector



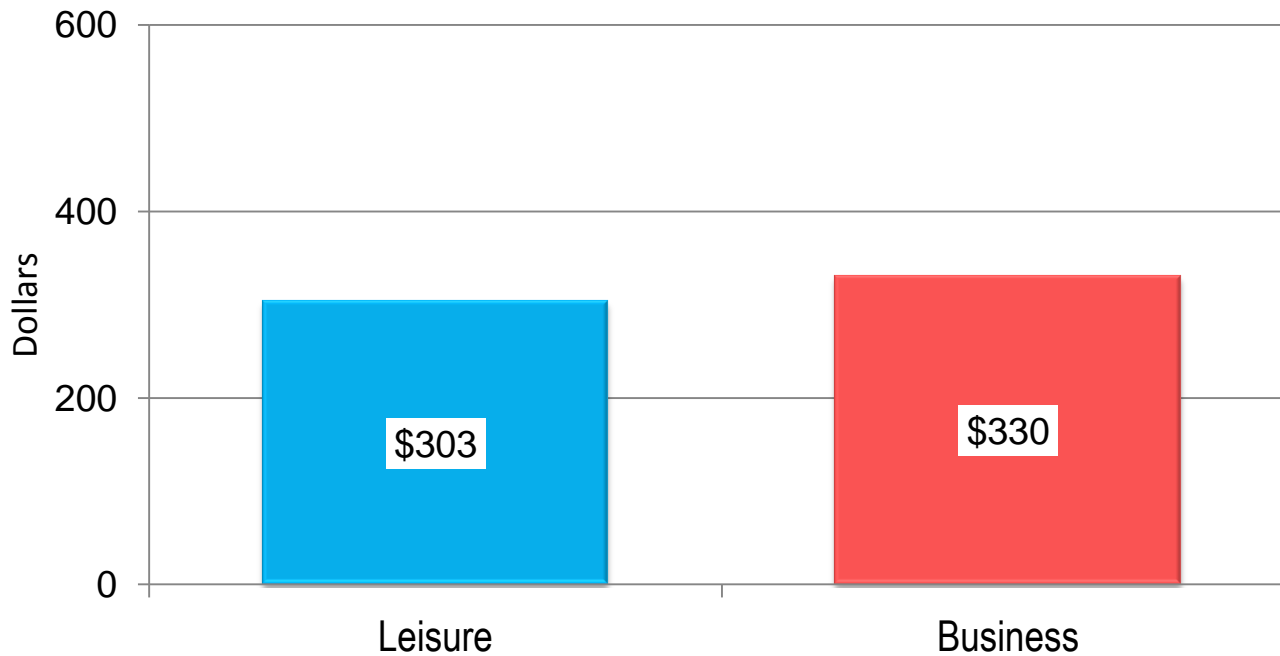
Base: Total Overnight Person-Trips



Average Per Party Expenditures on Overnight — by Trip Purpose



Base: Total Overnight Person-Trips





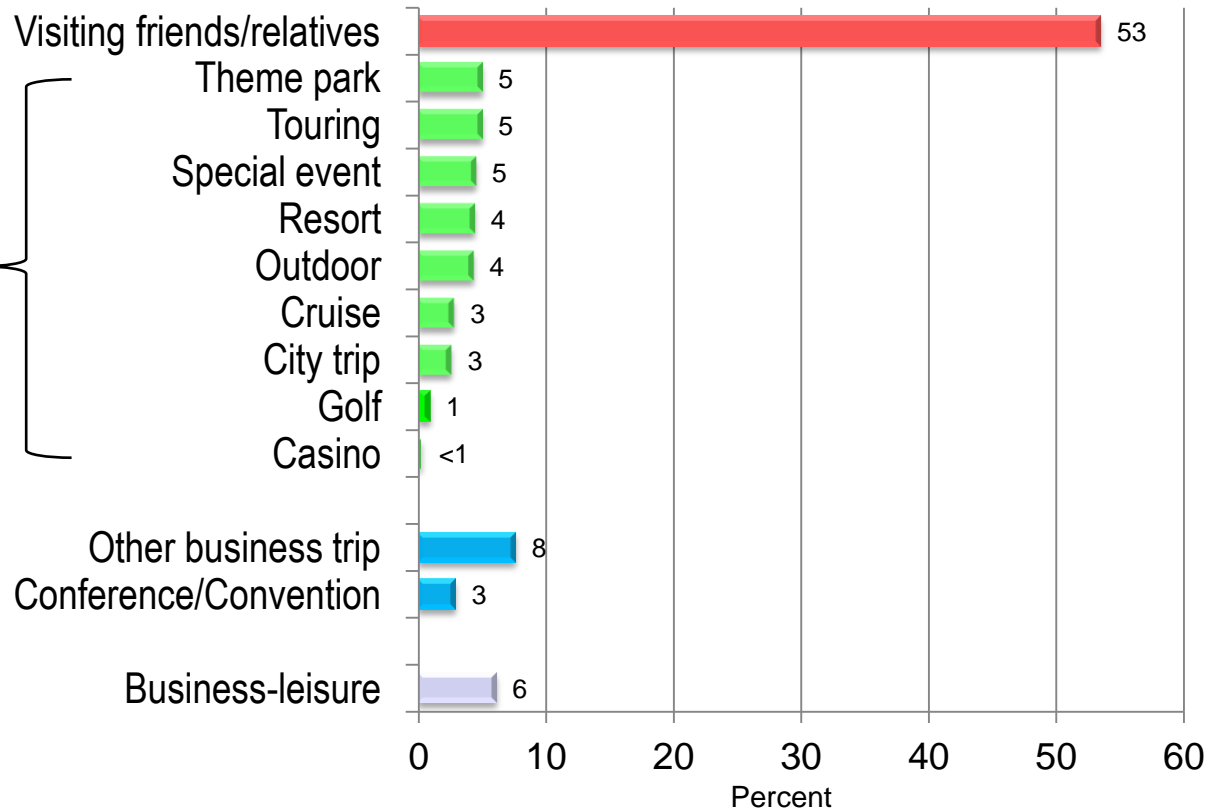
Overnight Trip Characteristics

Main Purpose of Trip



Base: Overnight Person-Trips to Jacksonville

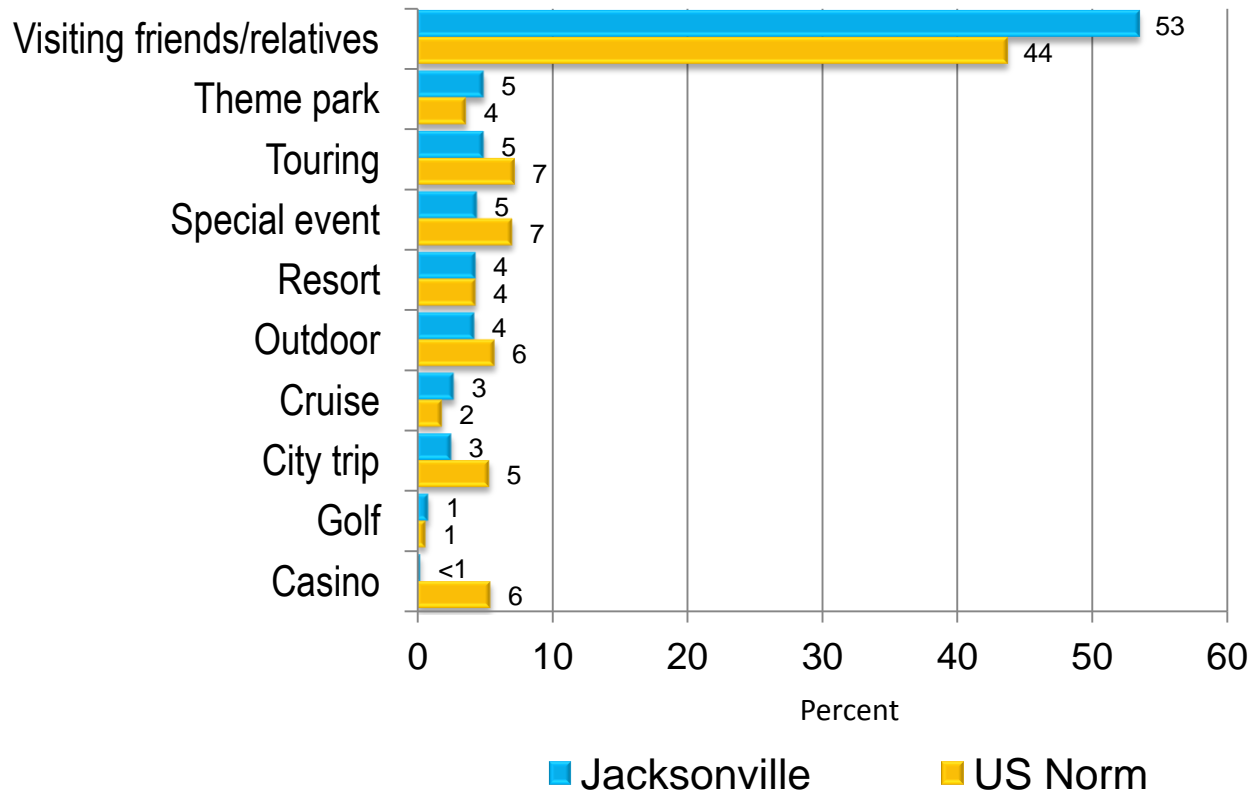
**Marketable
Trips
30%**



Main Purpose of Leisure Trip — Jacksonville vs. National Norm



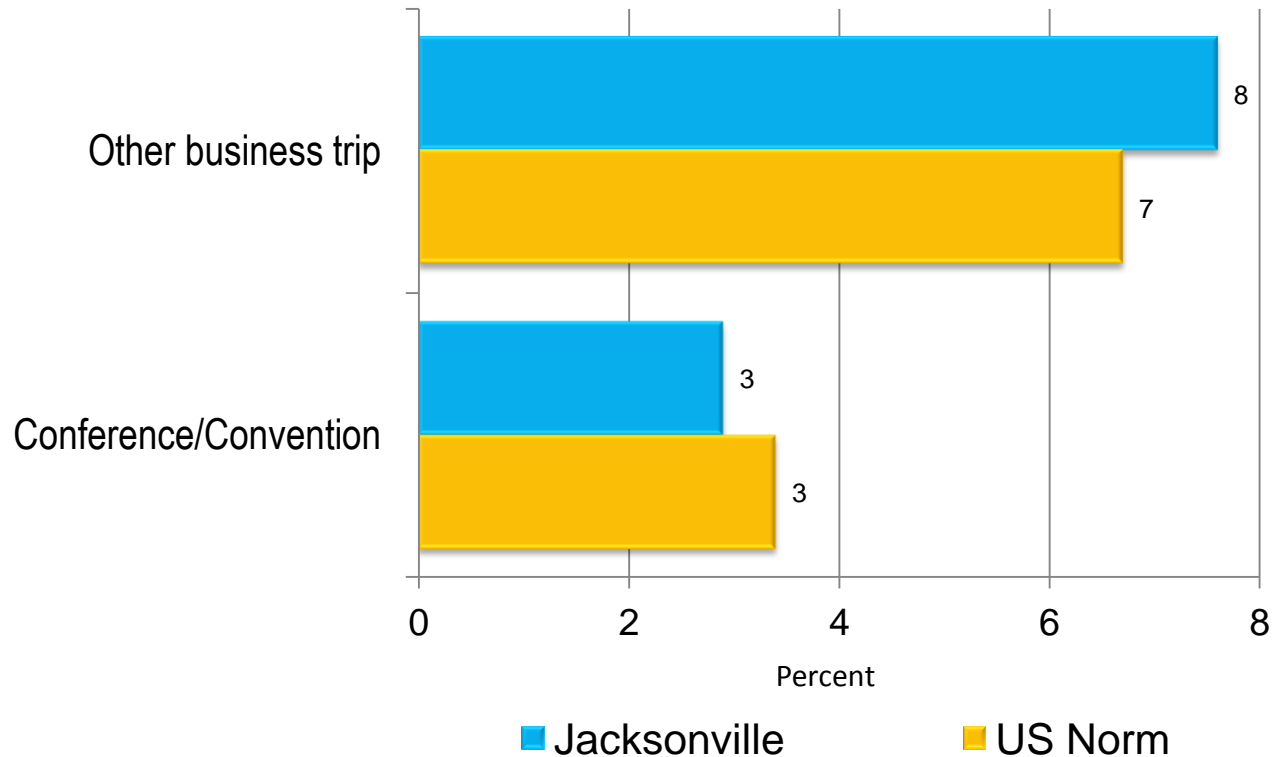
Base: Overnight Person-Trips



Main Purpose of Business Trip — Jacksonville vs. National Norm



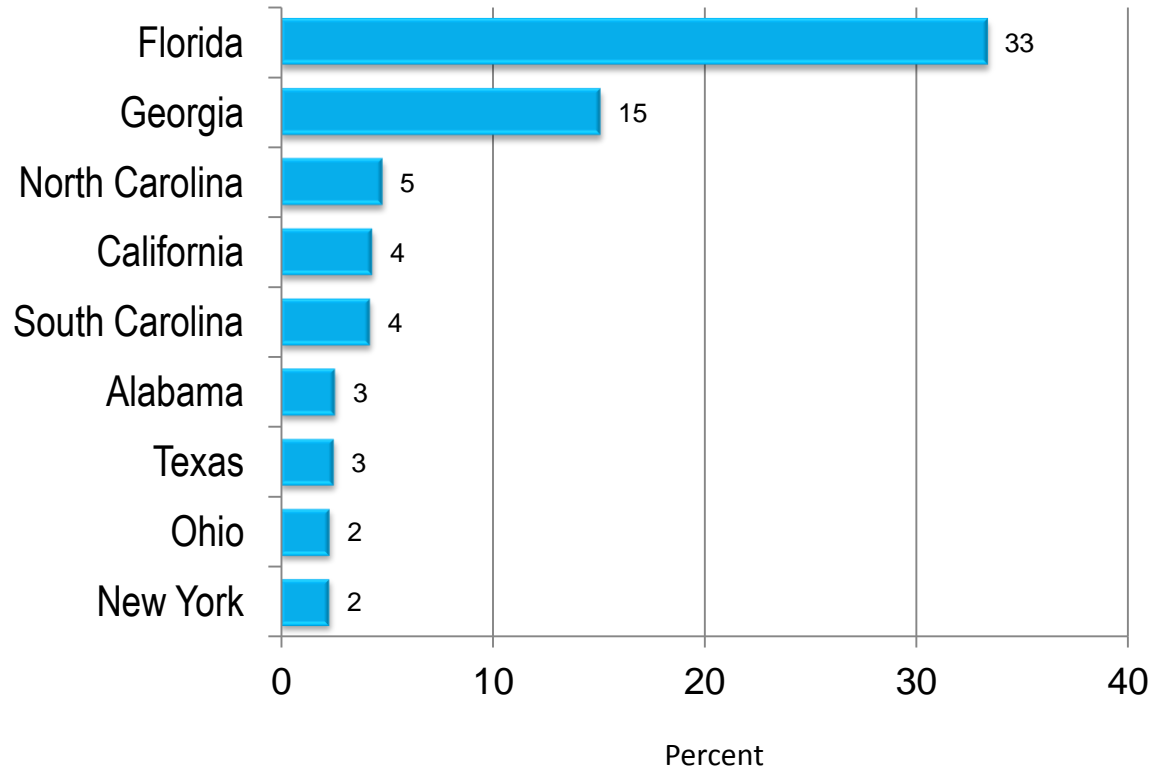
Base: Overnight Person-Trips



State Origin Of Trip



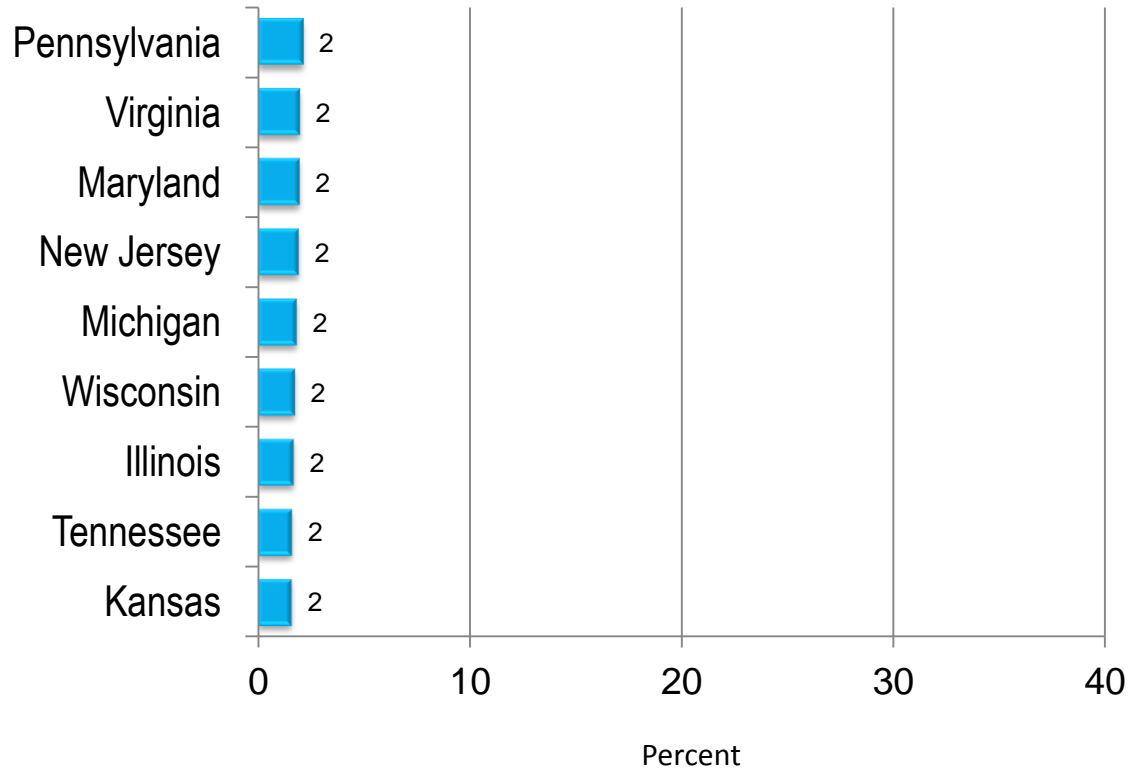
Base: Overnight Person-Trips to Jacksonville



State Origin Of Trip (cont'd)



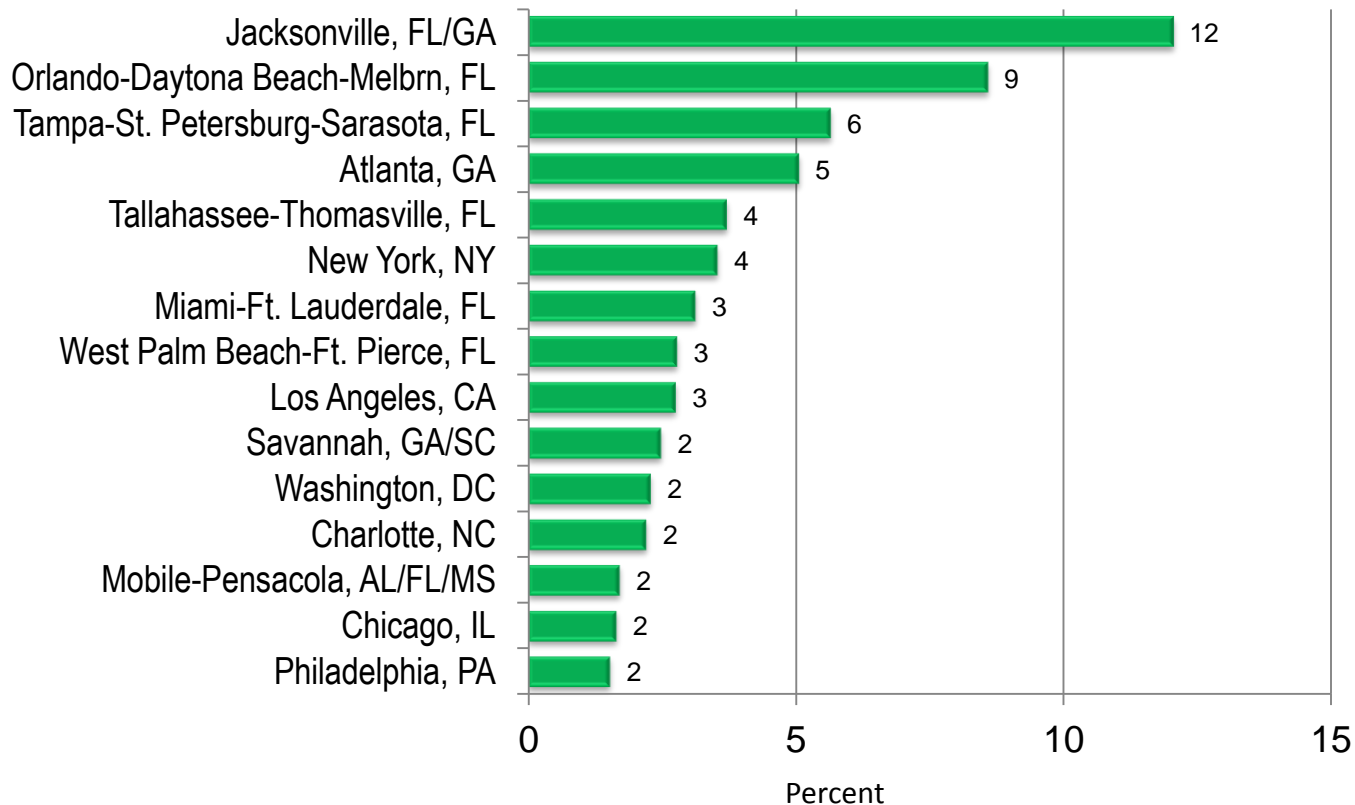
Base: Overnight Person-Trips to Jacksonville



DMA Origin Of Trip



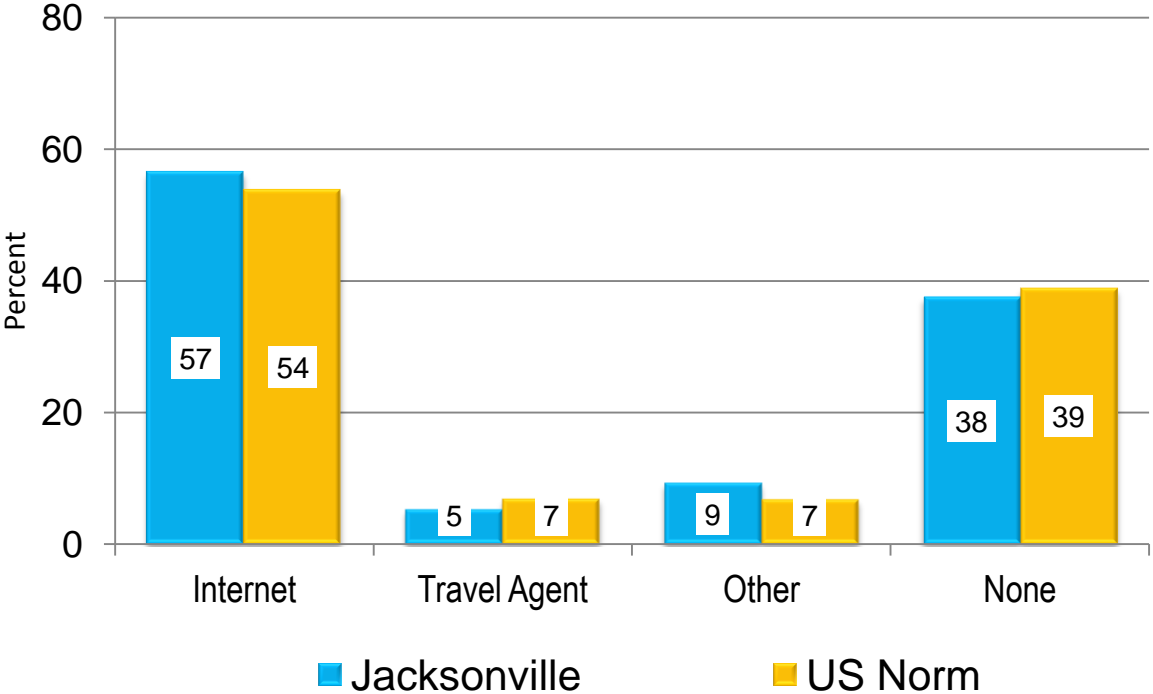
Base: Overnight Person-Trips to Jacksonville



Method of Planning Trip



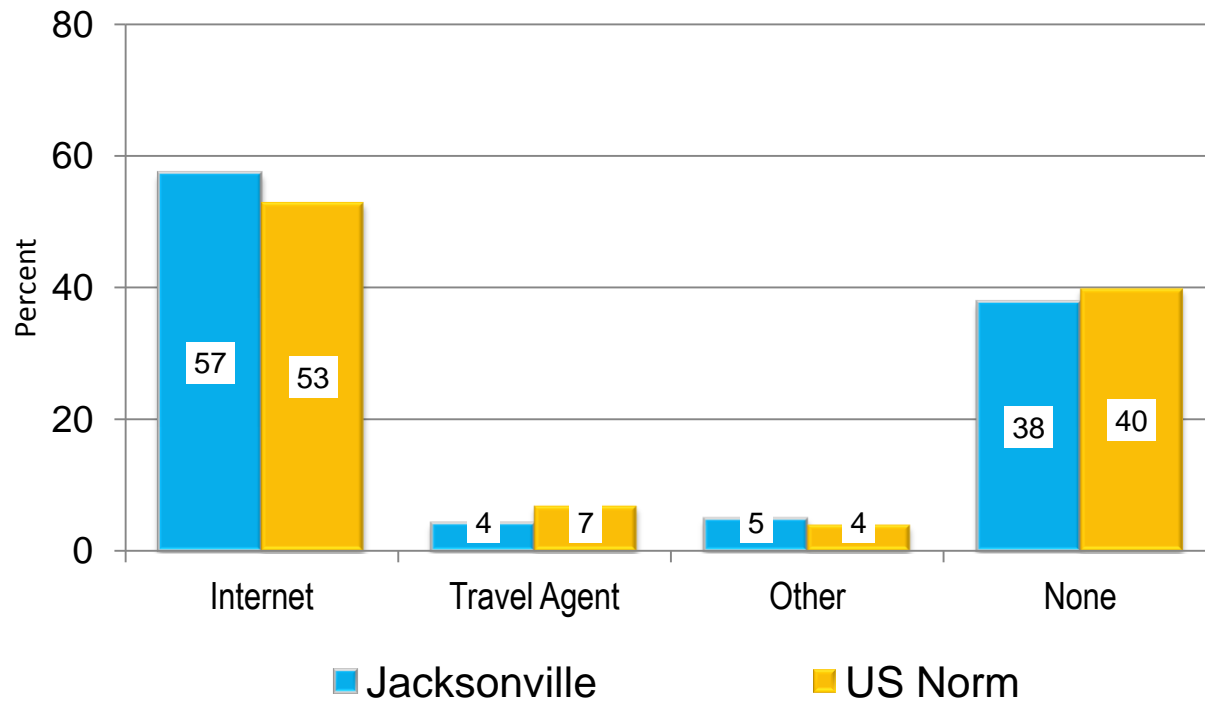
Base: Overnight Person-Trips



Method of Booking Trip



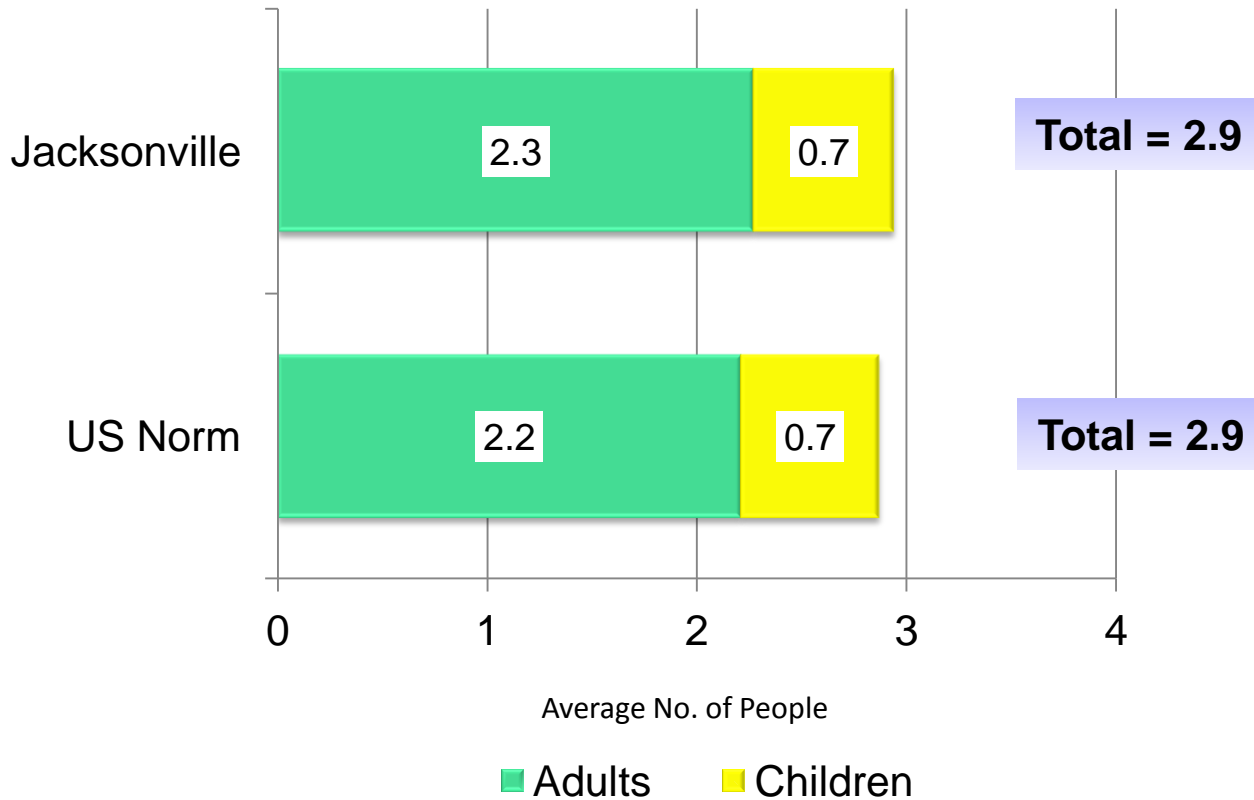
Base: Overnight Person-Trips



Size of Travel Party



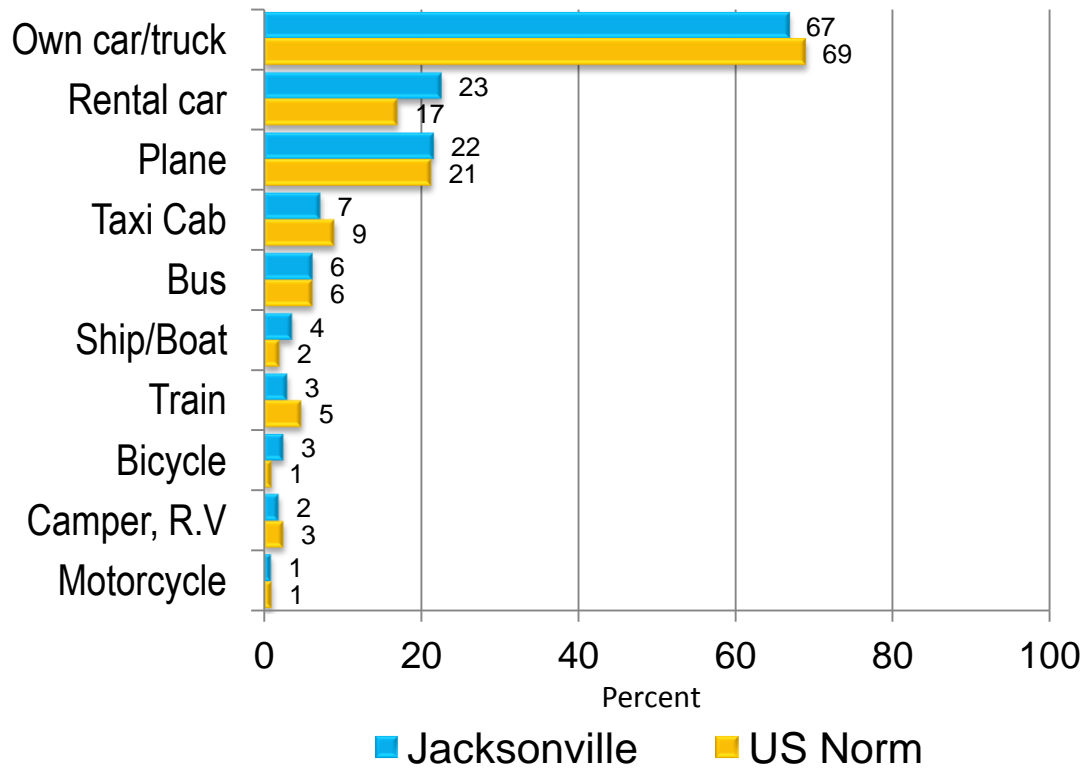
Base: Overnight Person-Trips



Transportation



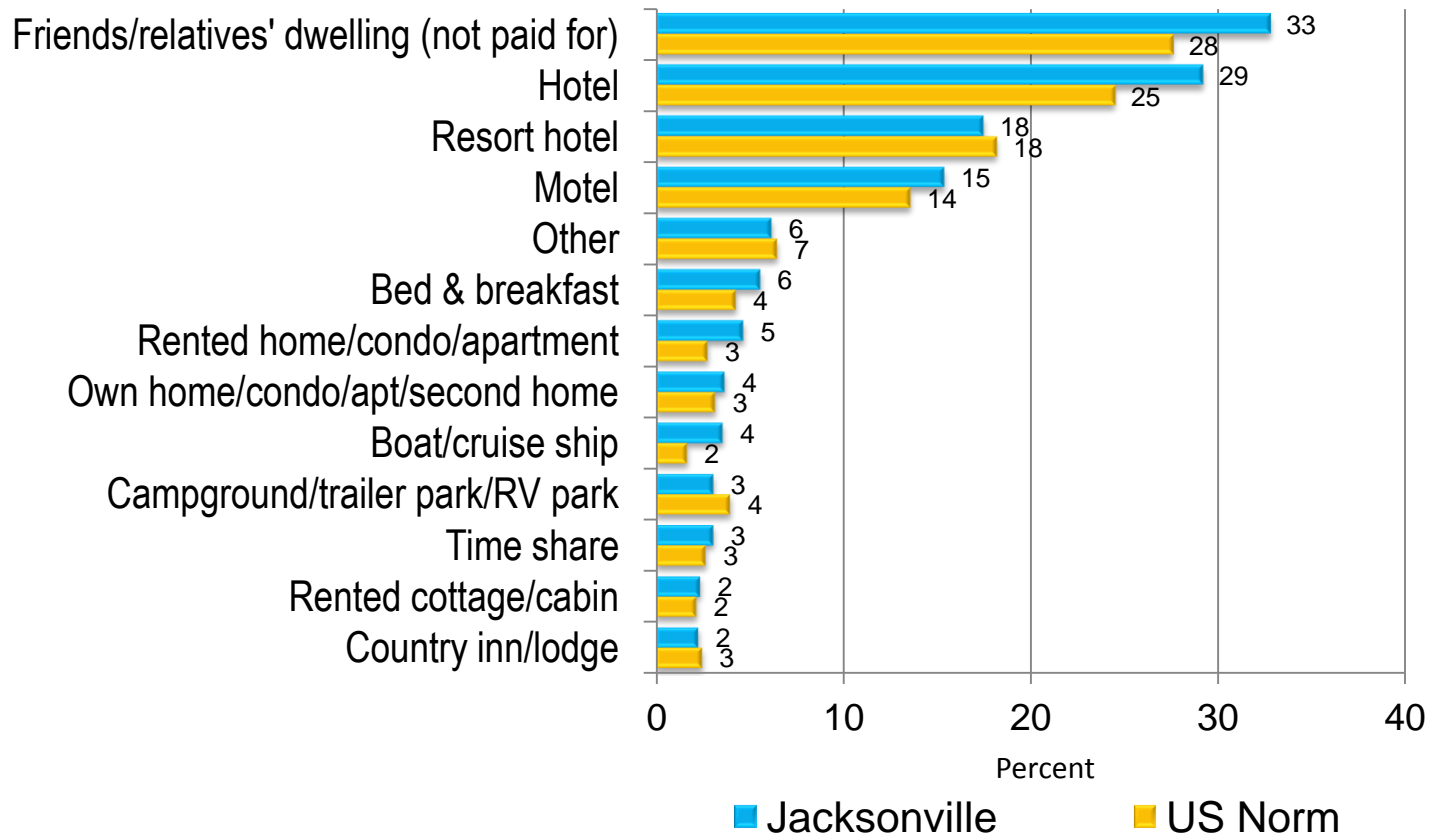
Base: Overnight Person-Trips



Accommodation



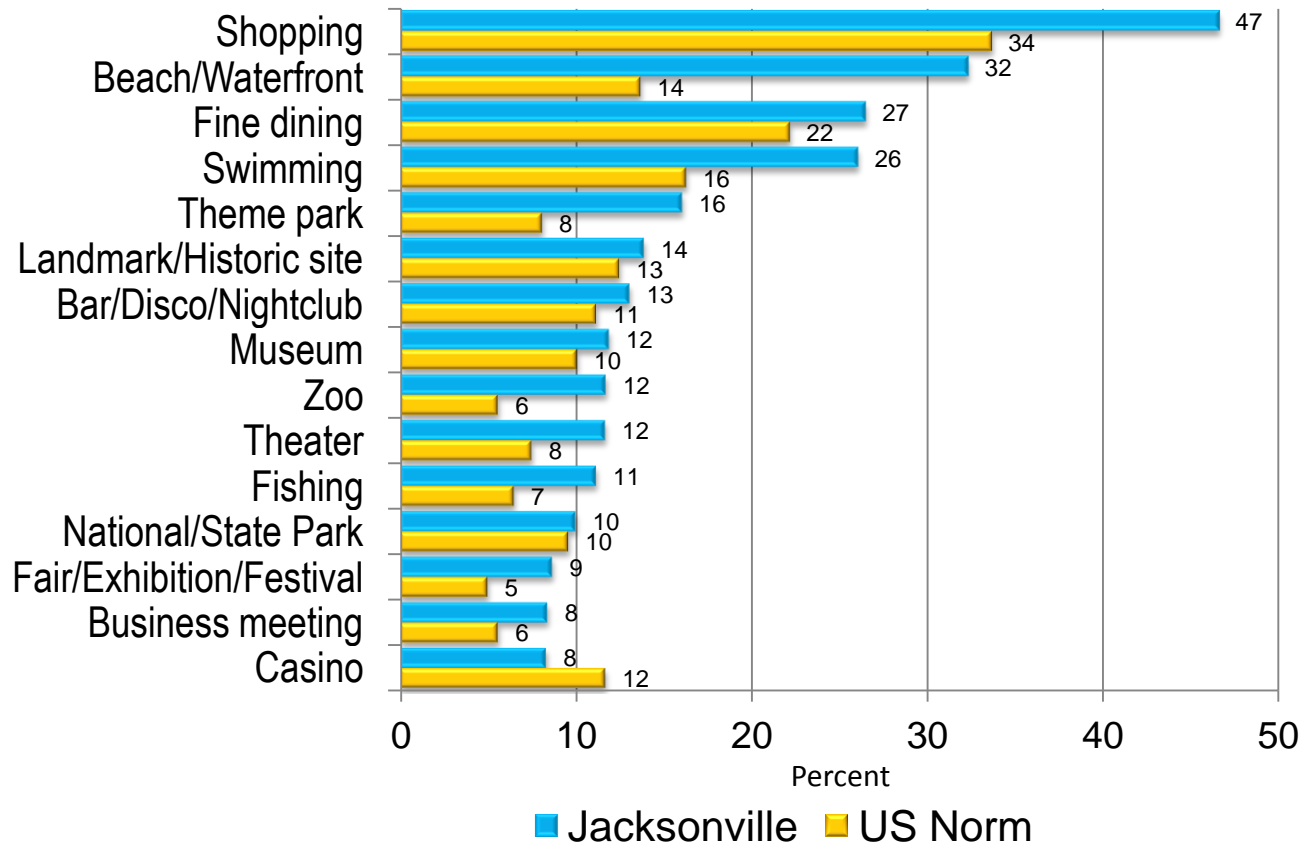
Base: Overnight Person-Trips



Activities and Experiences



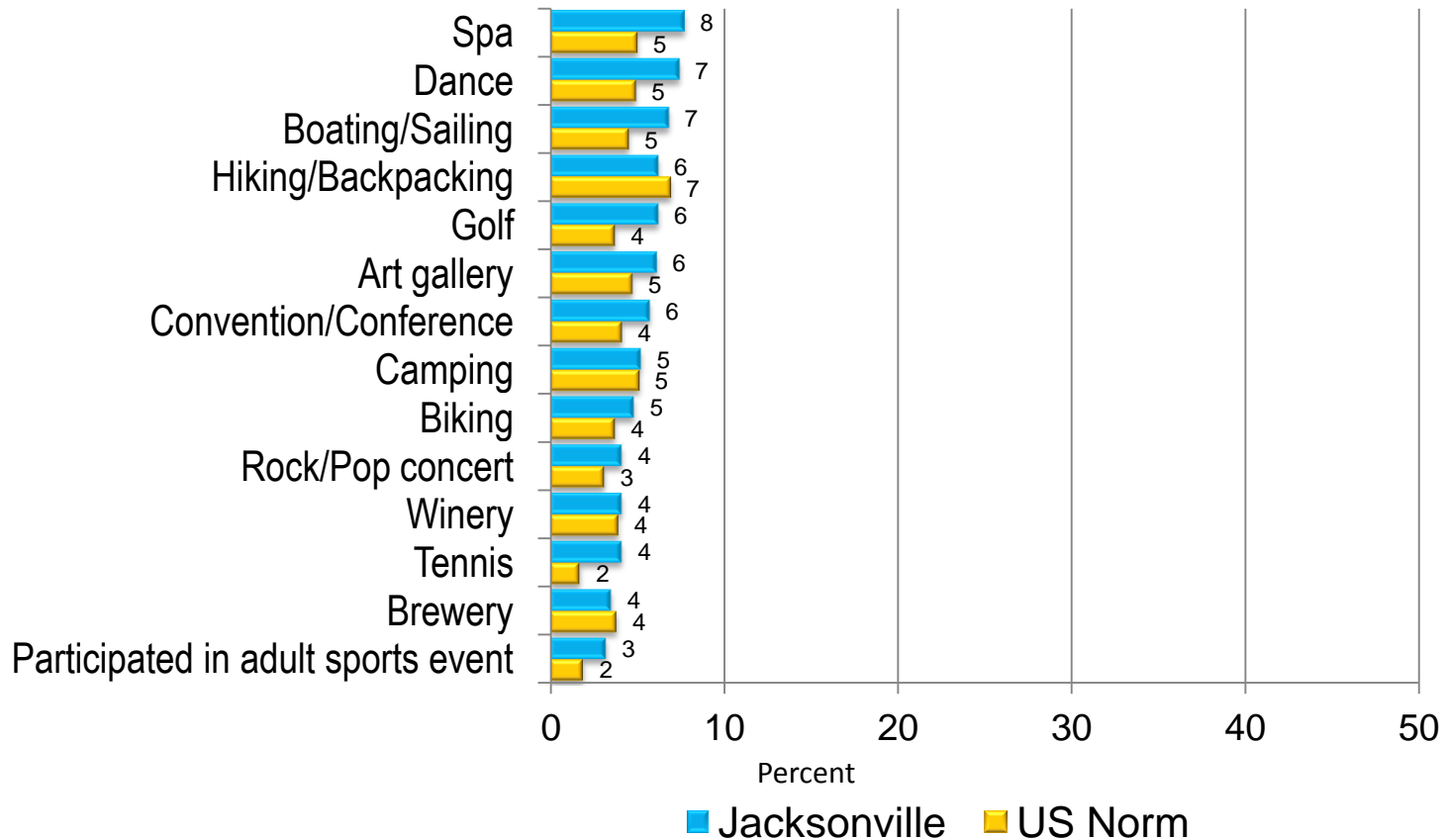
Base: Overnight Person-Trips



Activities and Experiences (cont'd)



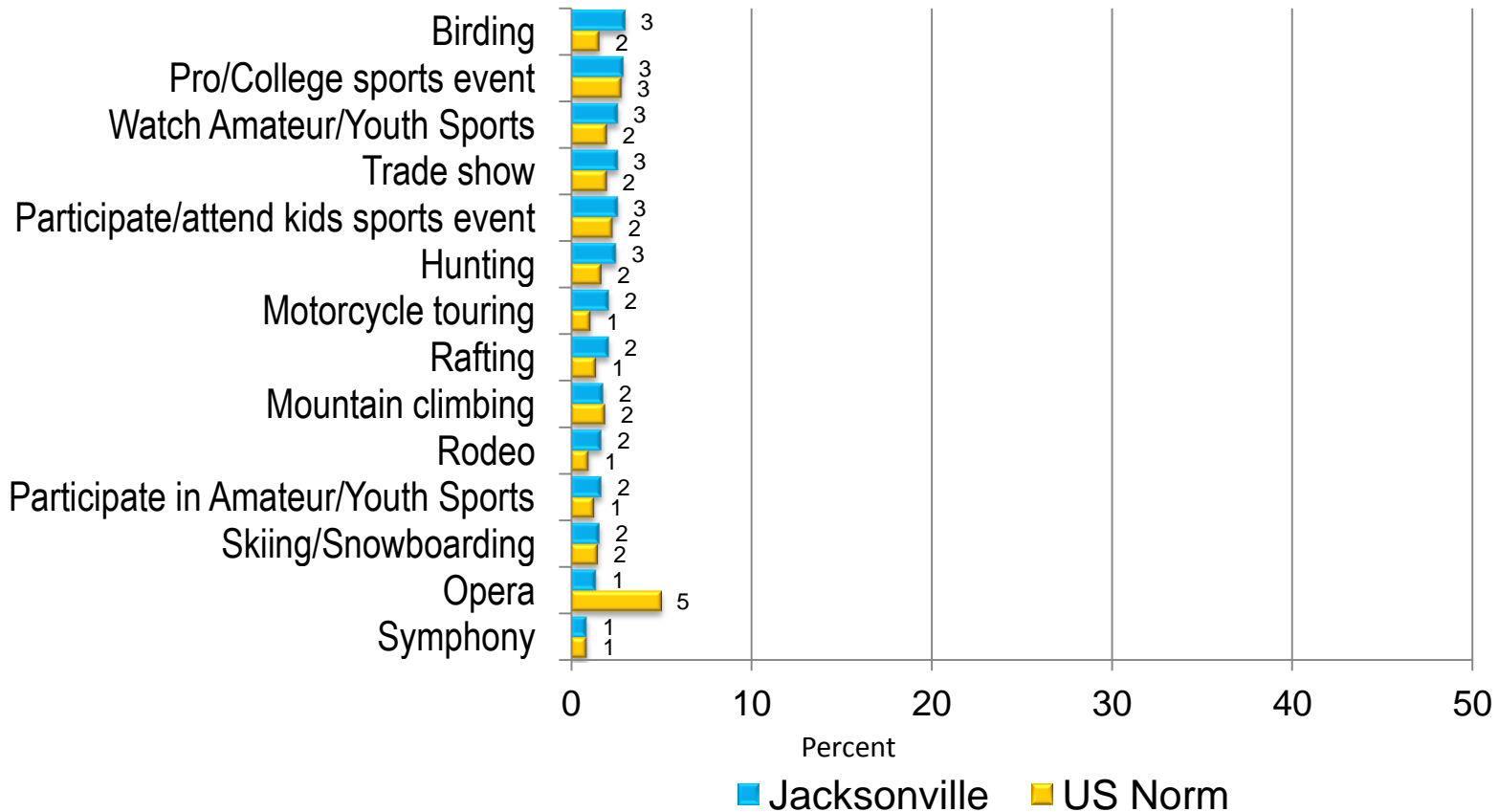
Base: Overnight Person-Trips



Activities and Experiences (cont'd)



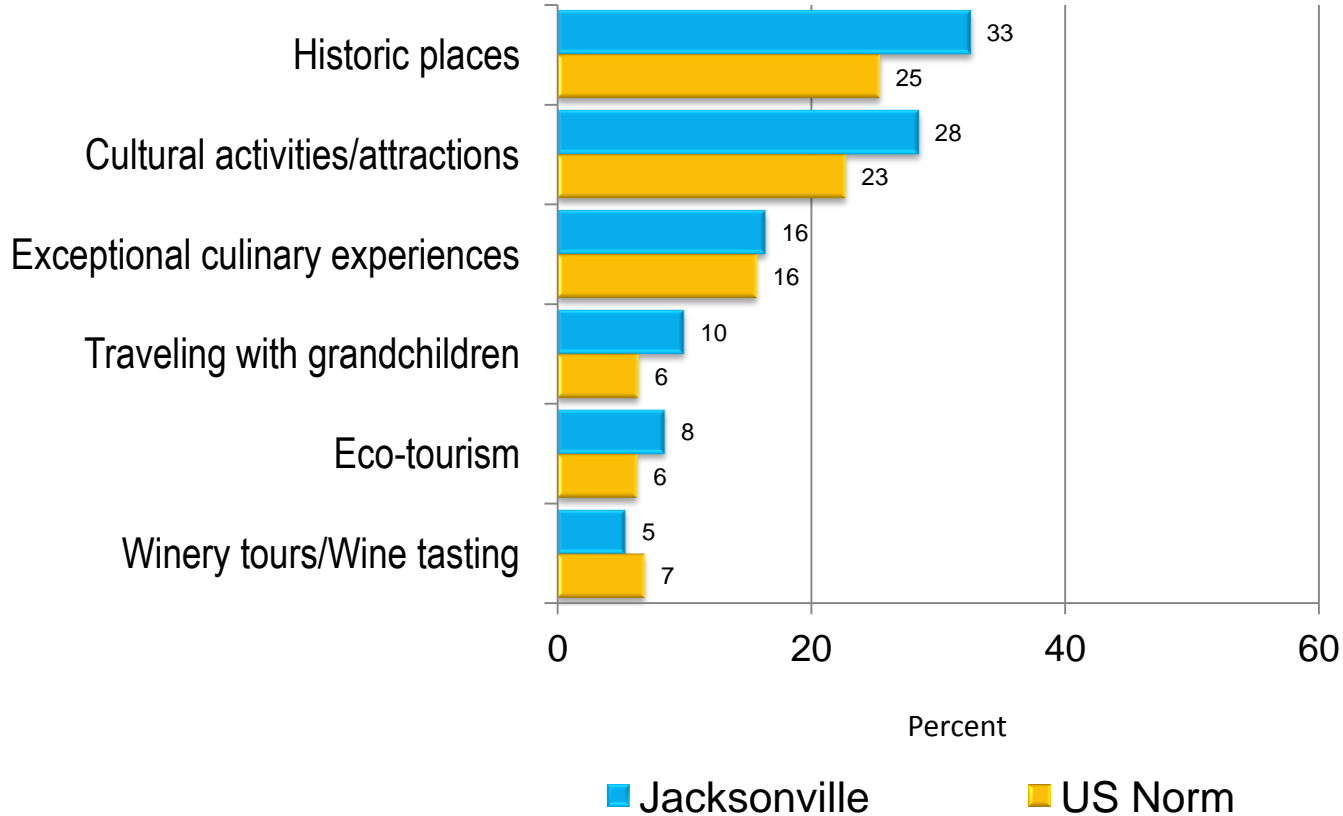
Base: Overnight Person-Trips



Activities of Special Interest



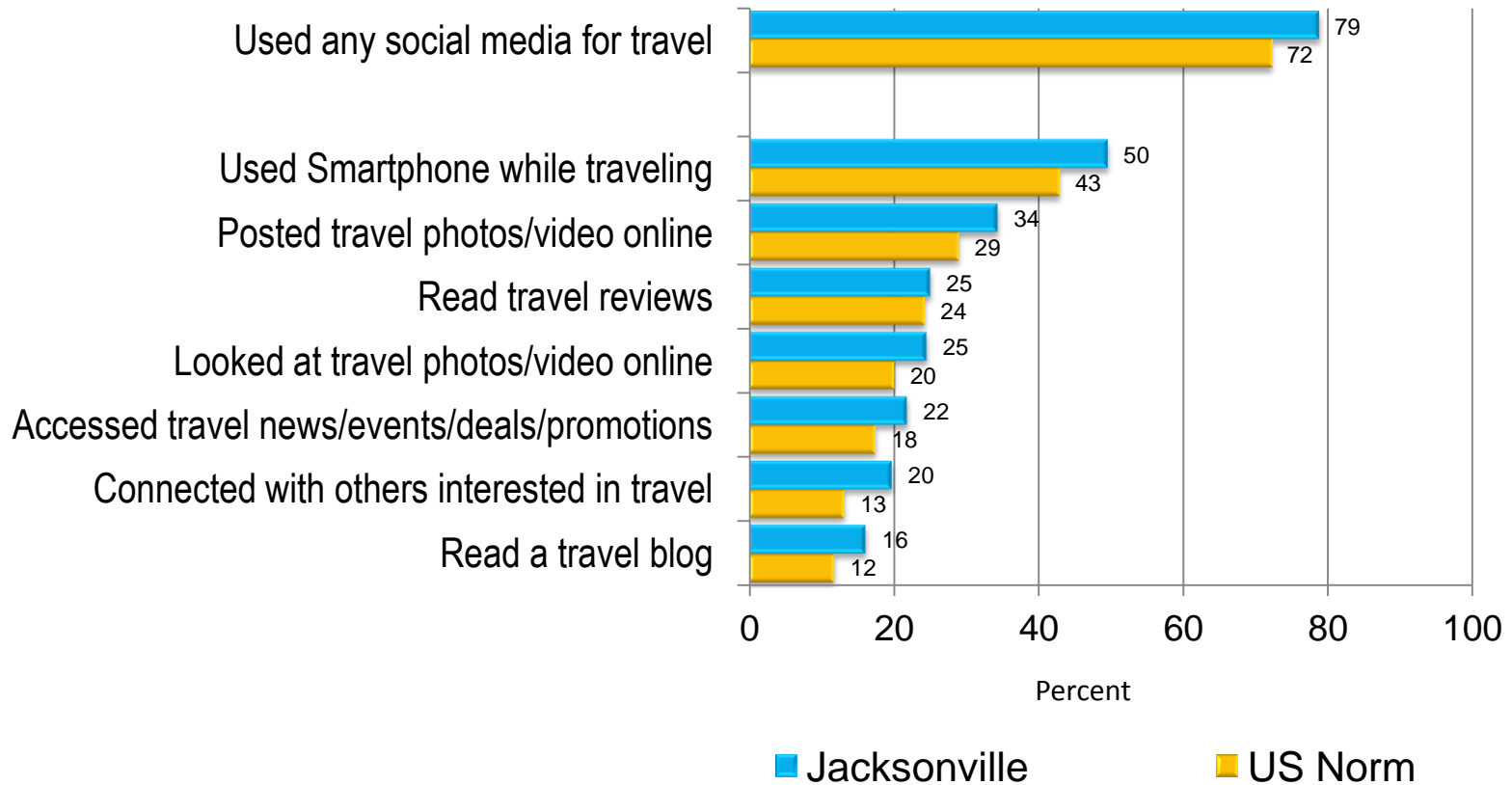
Base: Overnight Person-Trips



Online Social Media Use by Travelers



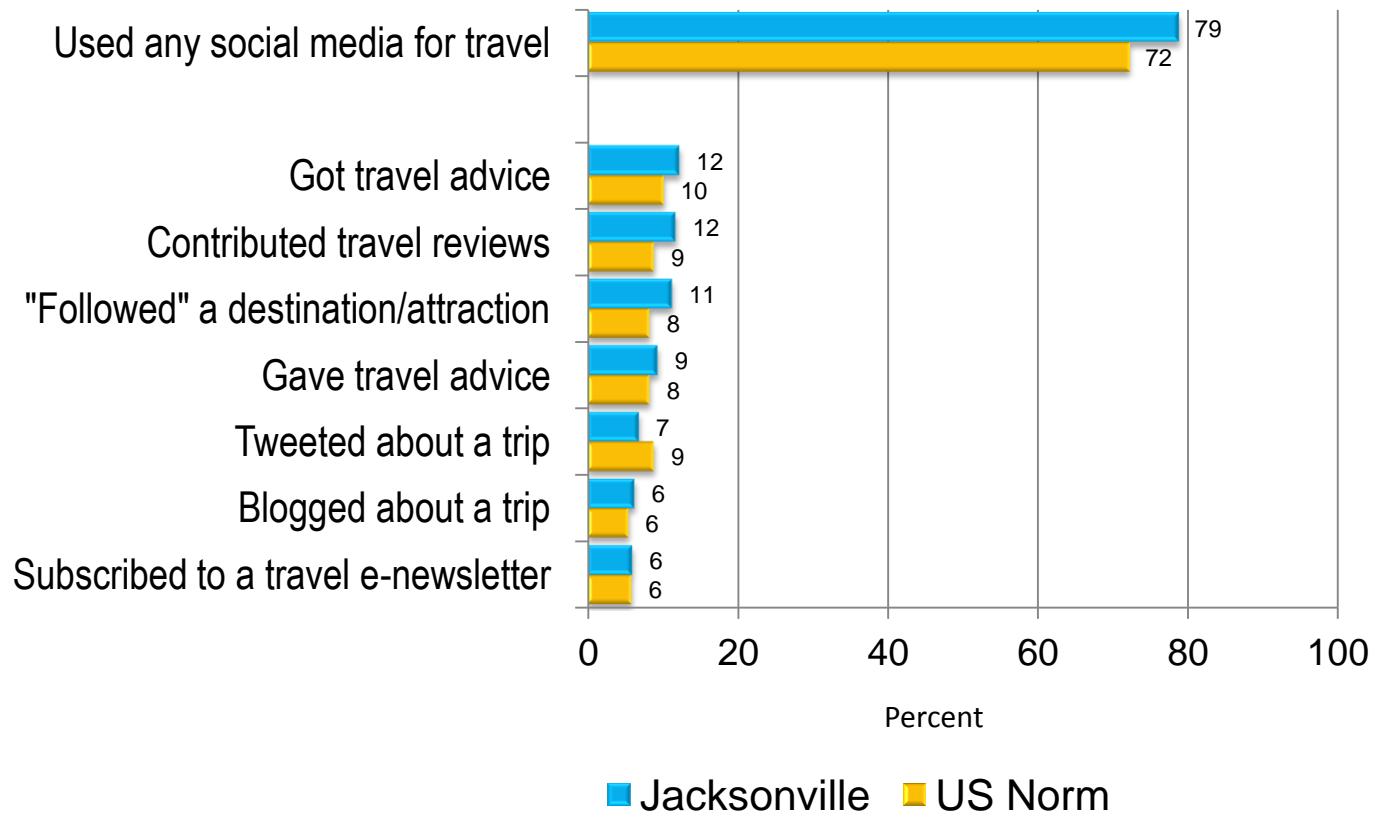
Base: Overnight Person-Trips



Online Social Media Use by Travelers (cont'd)



Base: Overnight Person-Trips





Day Trip Detail

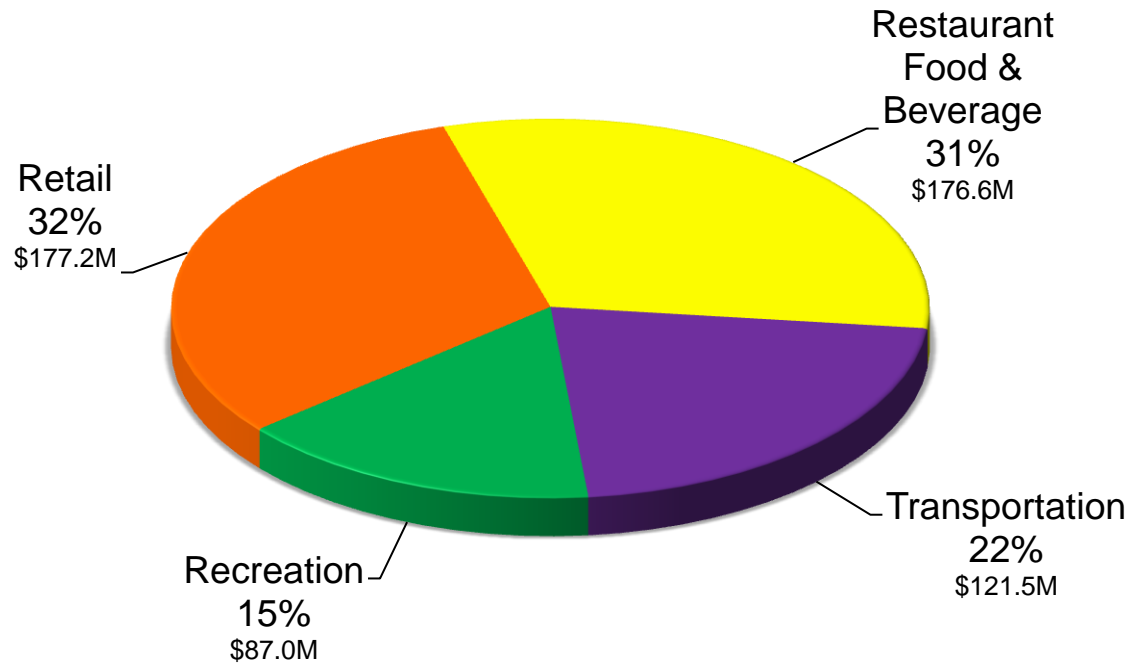


Day Trip Expenditures

Total Day Trip Spending — by Sector



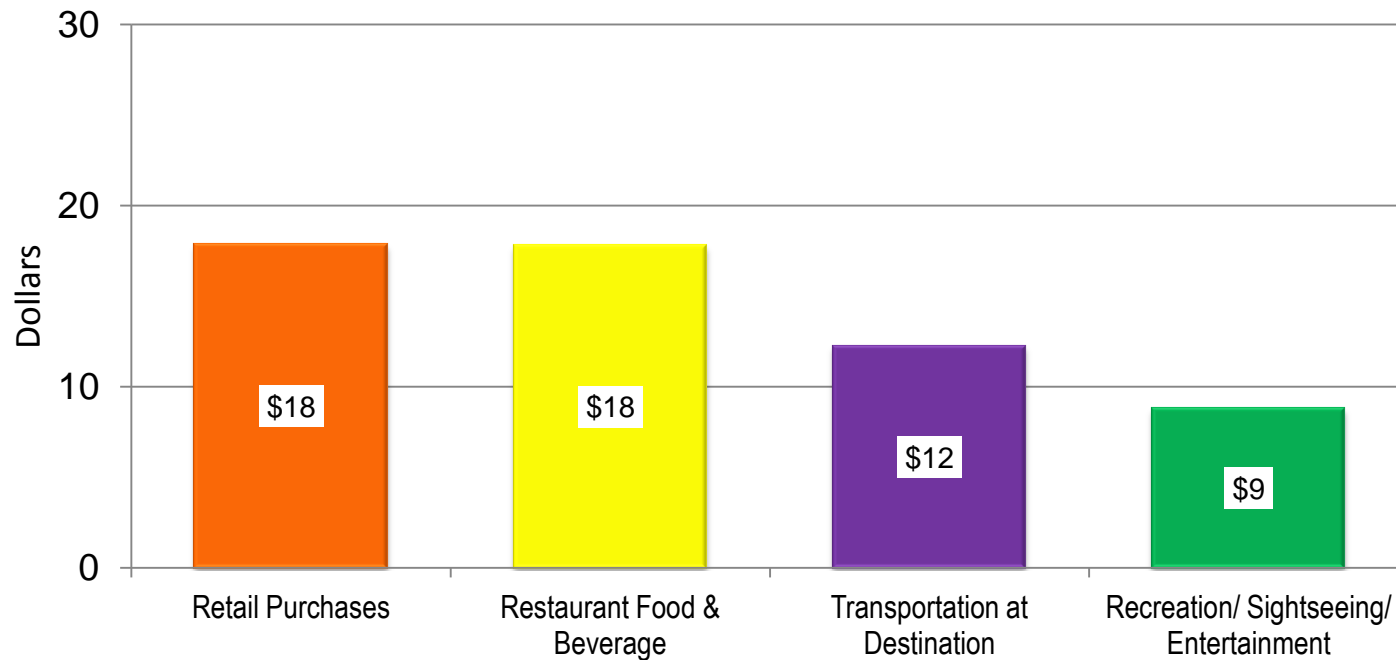
Total Spending = \$562.3 Million



Average Per Person Expenditures on Day Trips — By Sector



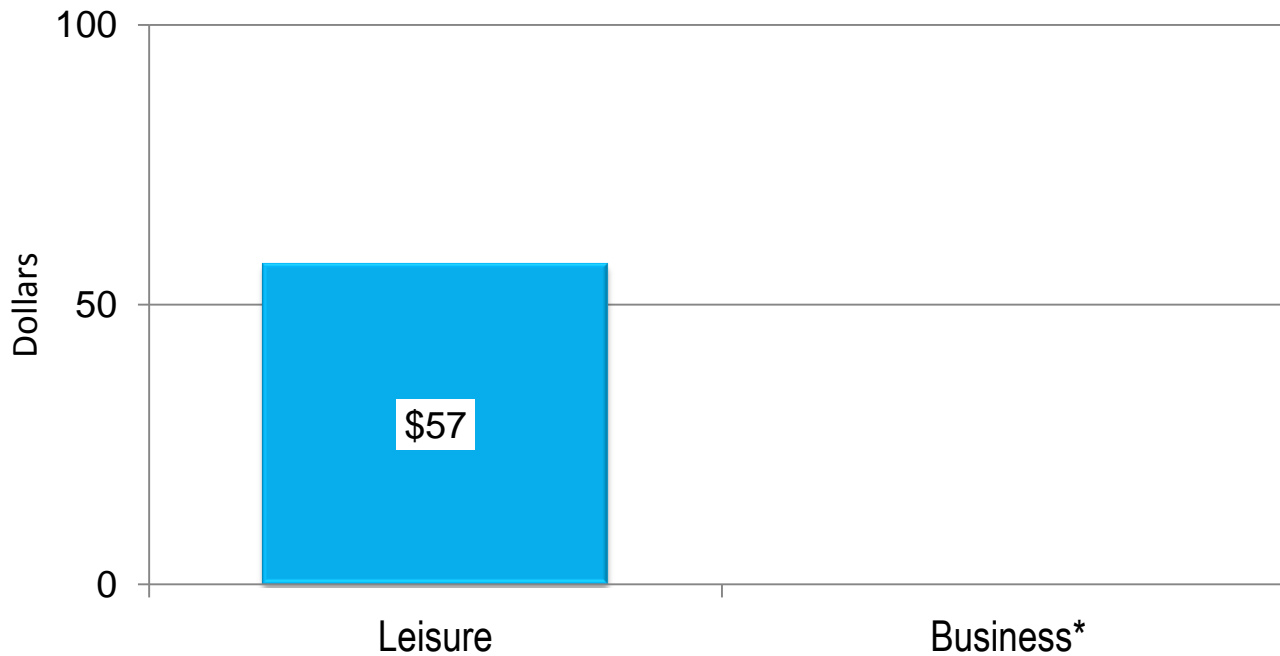
Base: Total Day Person-Trips



Average Per Person Expenditures on Day Trip — by Trip Purpose



Base: Total Day Person-Trips

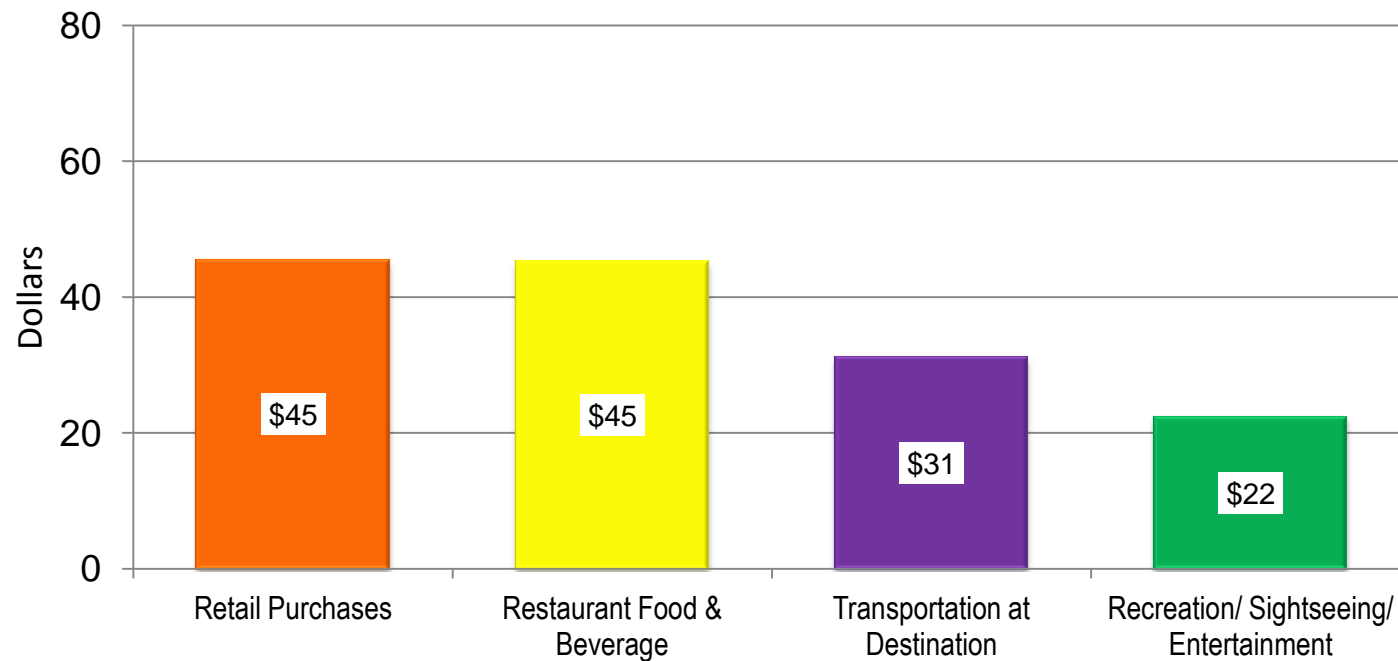


* Very low base

Average Per Party Expenditures on Day Trips — By Sector



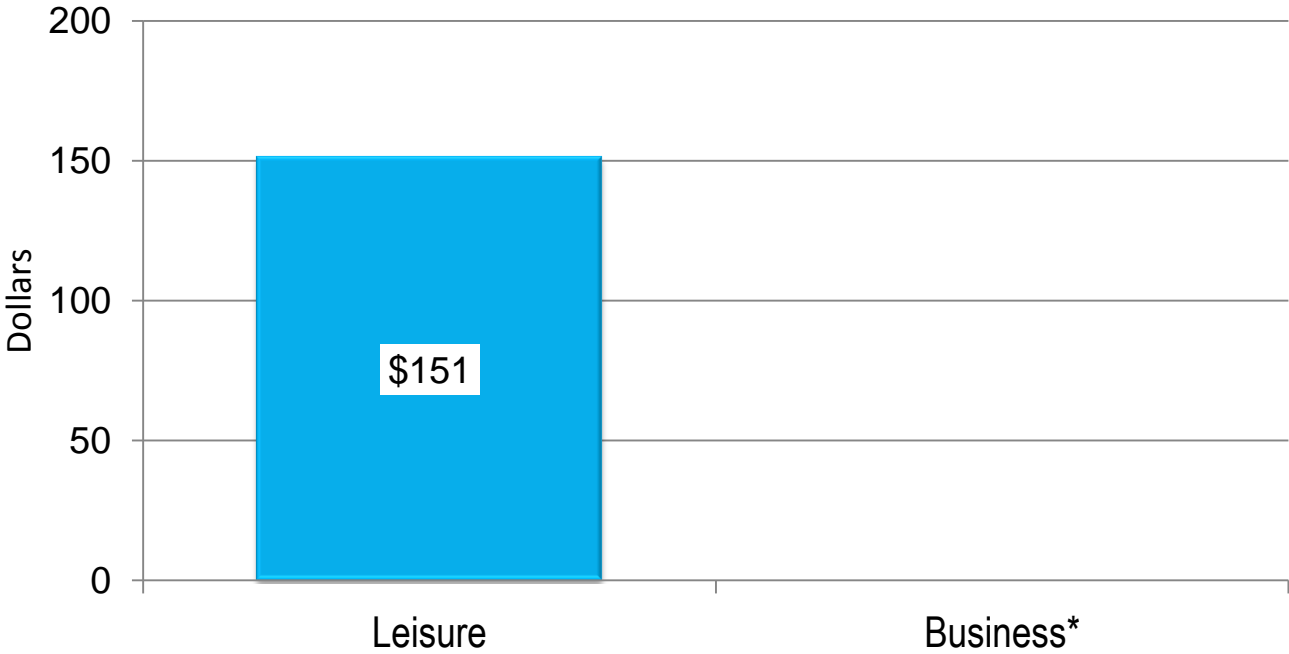
Base: Total Day Person-Trips



Average Per Party Expenditures on Day Trip — by Trip Purpose



Base: Total Day Person-Trips



* Very low base



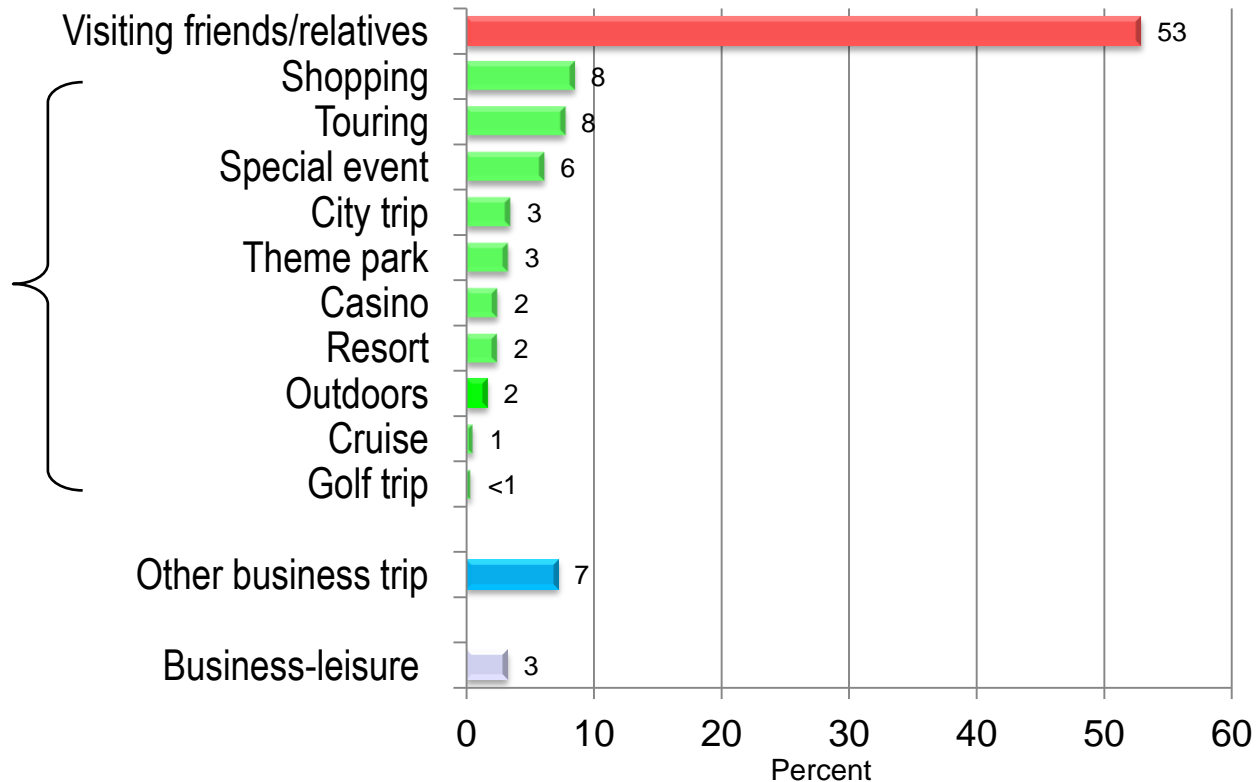
Day Trip Characteristics

Main Purpose of Trip



Base: Day Person-Trips to Jacksonville

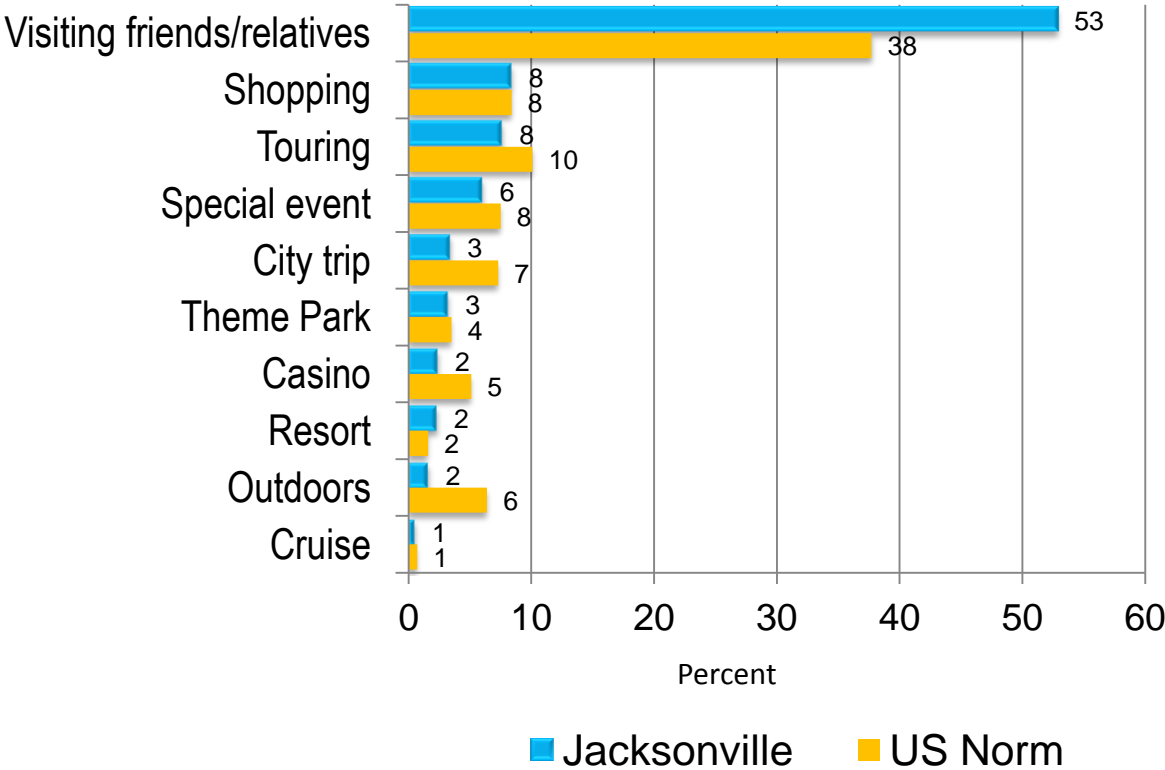
**Marketable
Trips
37%**



Main Purpose of Leisure Trip — Jacksonville vs. National Norm



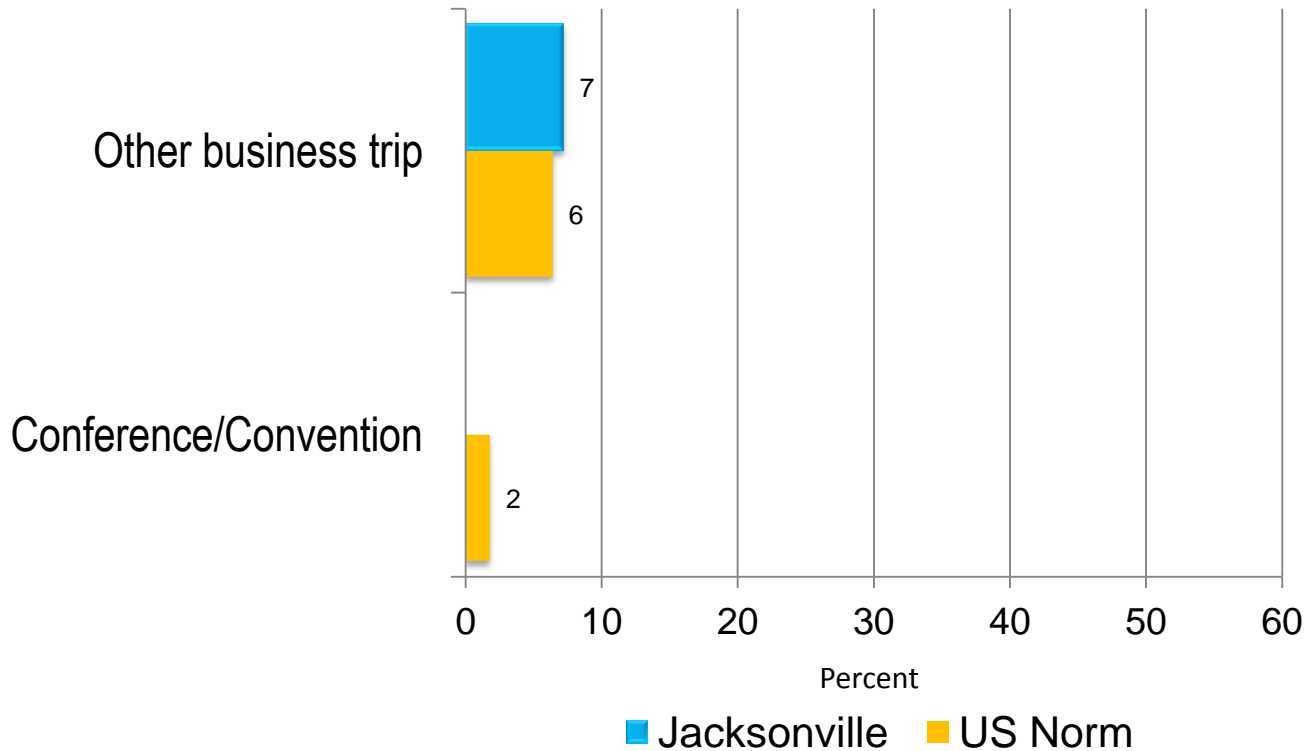
Base: Day Person-Trips



Main Purpose of Business Trip — Jacksonville vs. National Norm



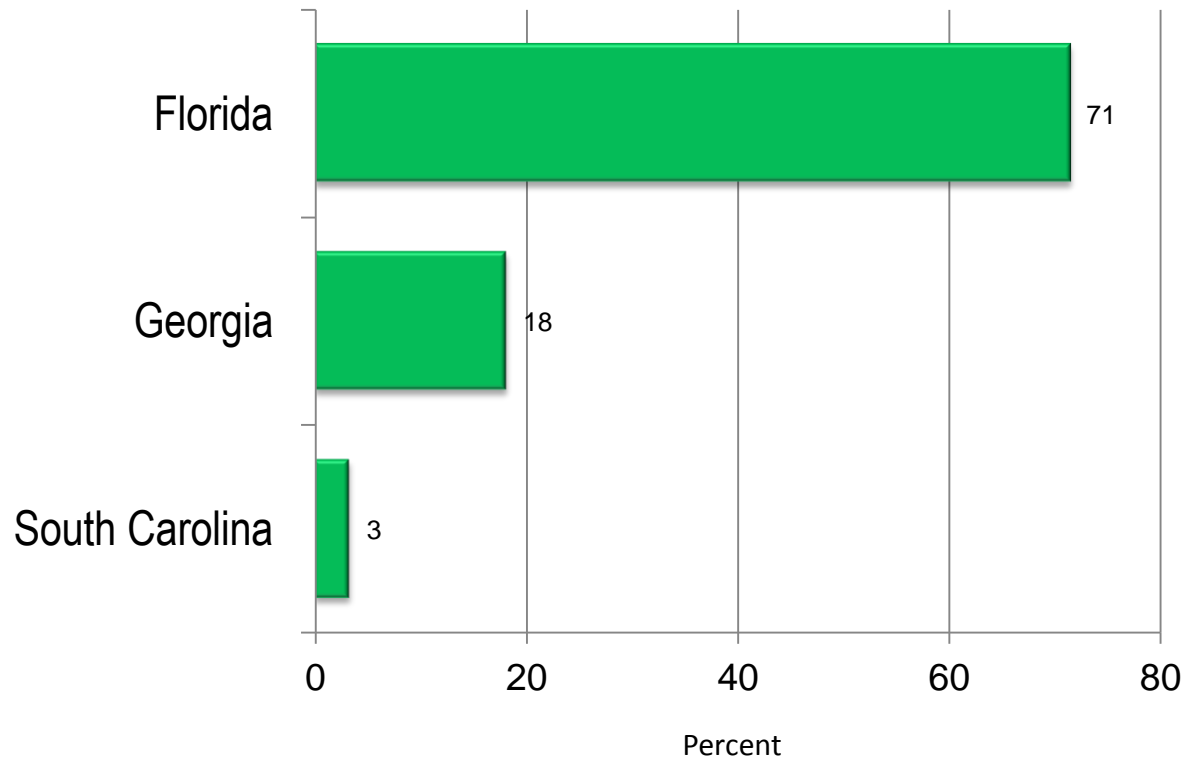
Base: Day Person-Trips



State Origin Of Trip



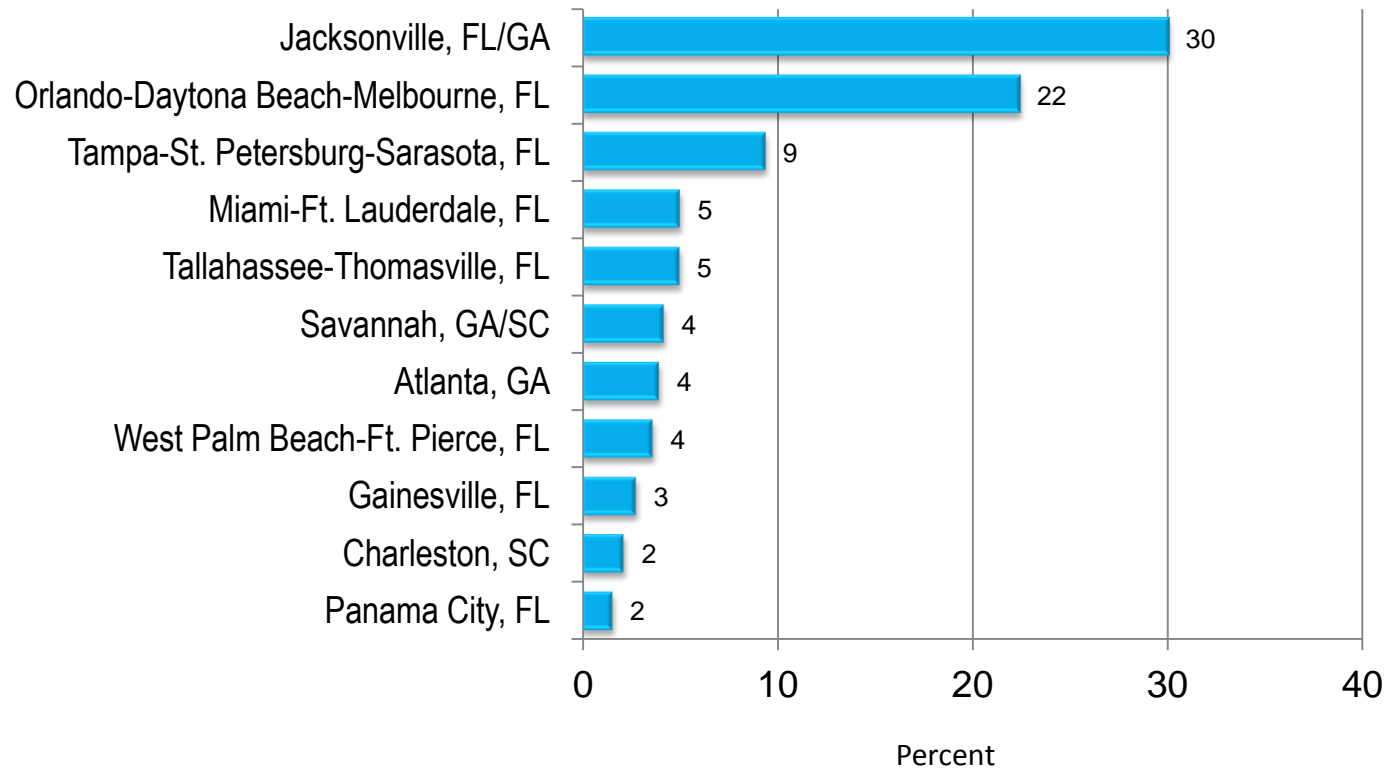
Base: Day Person-Trips to Jacksonville



DMA Origin Of Trip



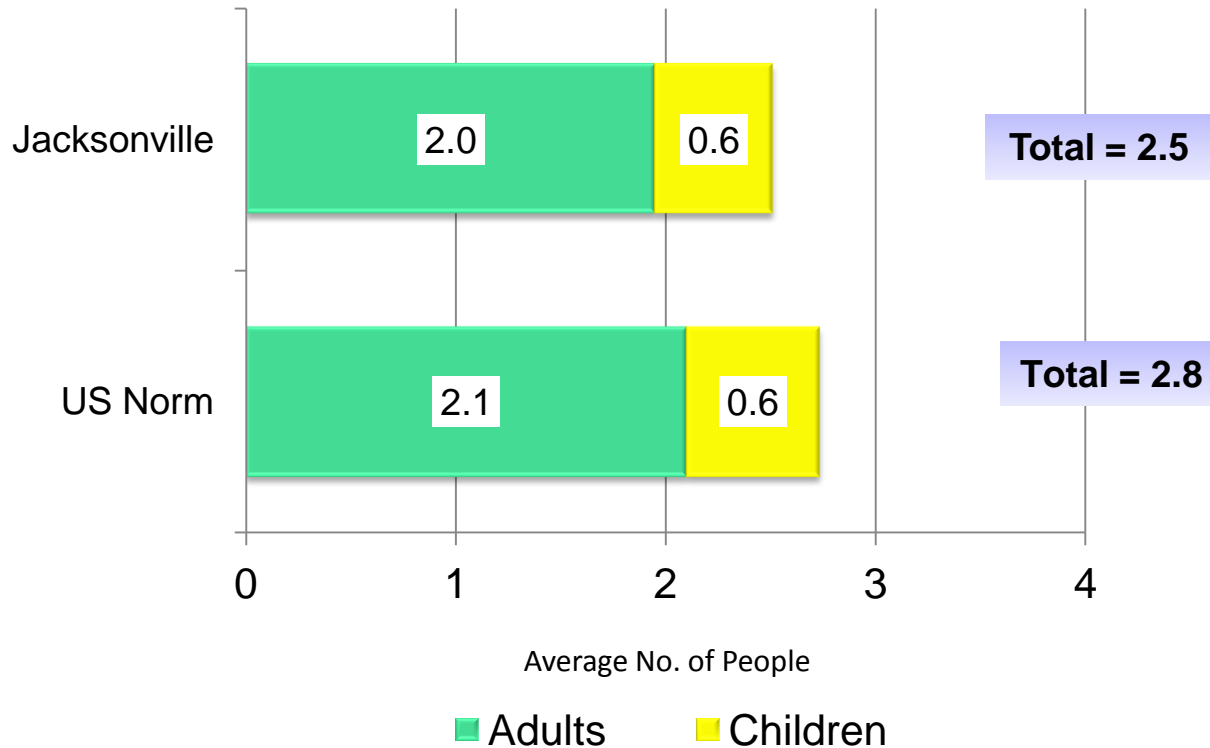
Base: Day Person-Trips to Jacksonville



Size of Travel Party



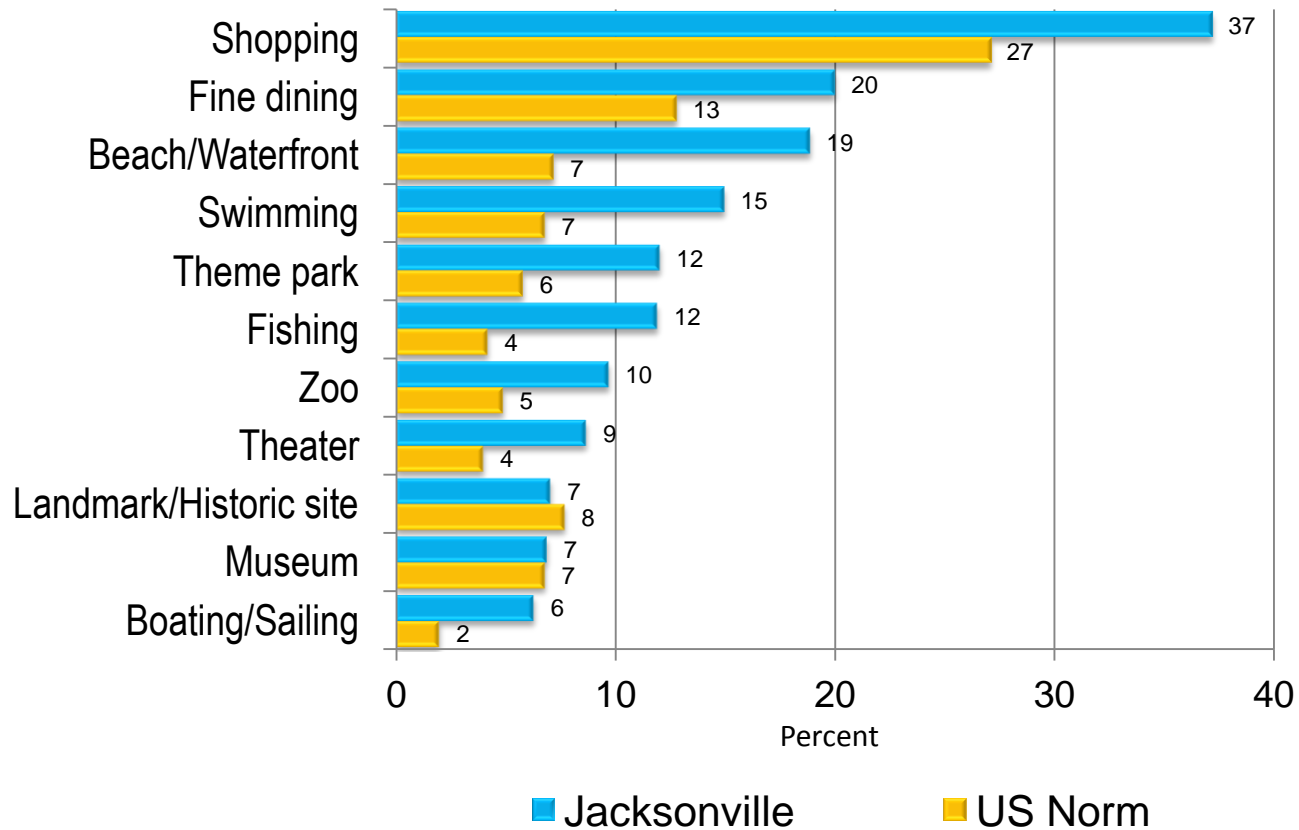
Base: Day Person-Trips



Activities and Experiences



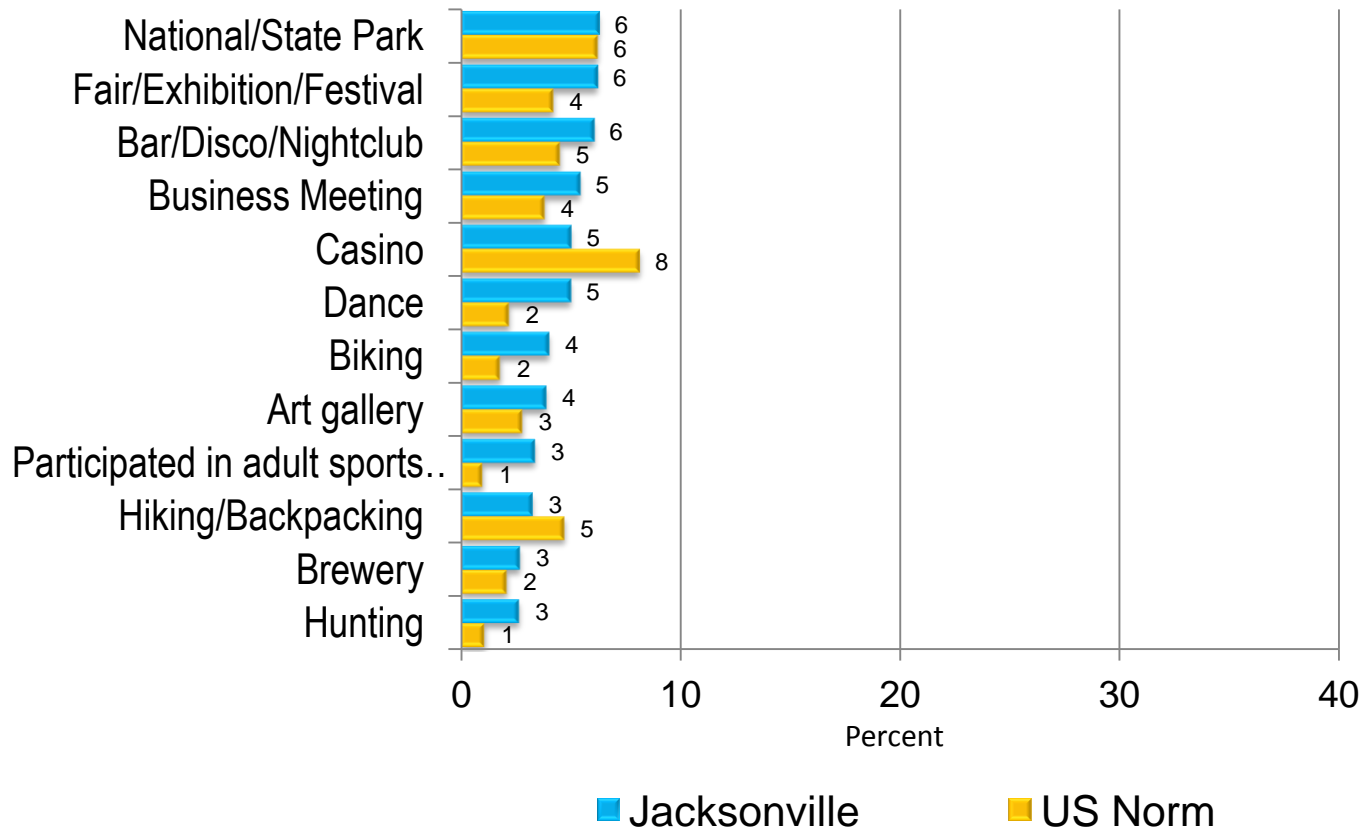
Base: Day Person-Trips



Activities and Experiences (cont'd)



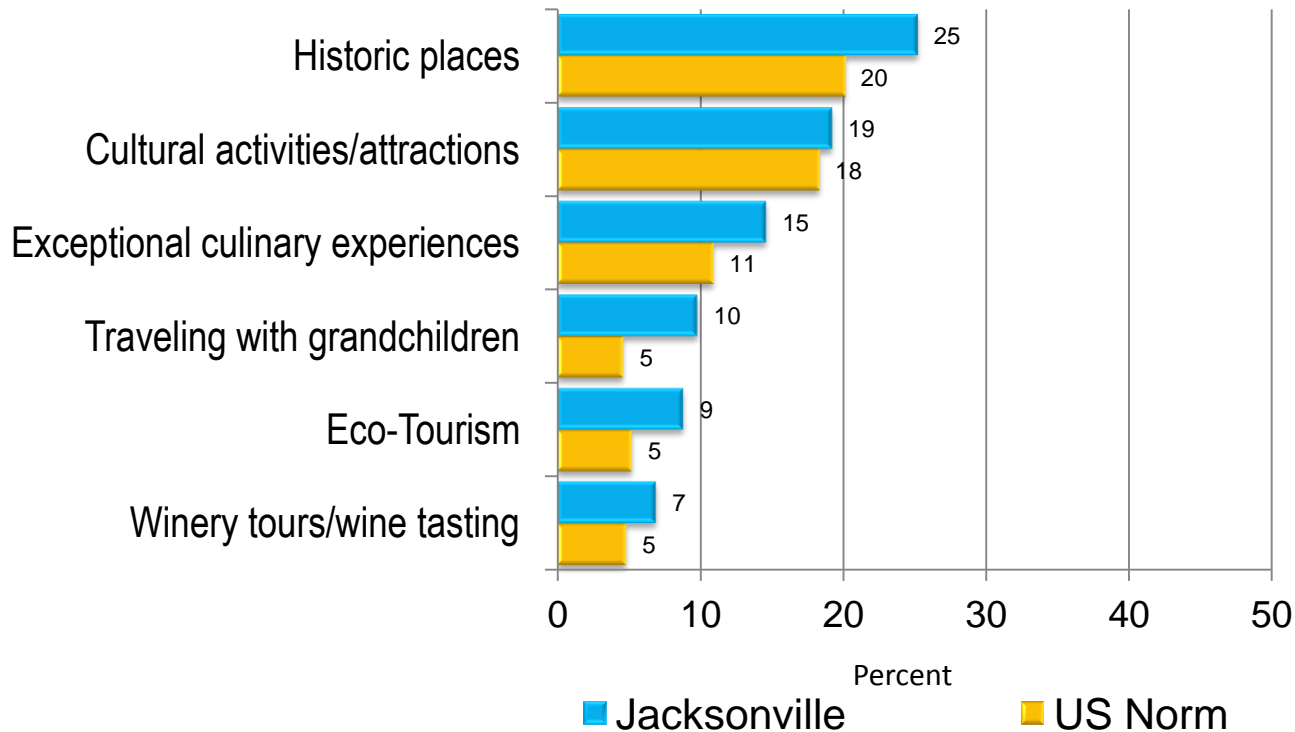
Base: Day Person-Trips



Activities of Special Interest



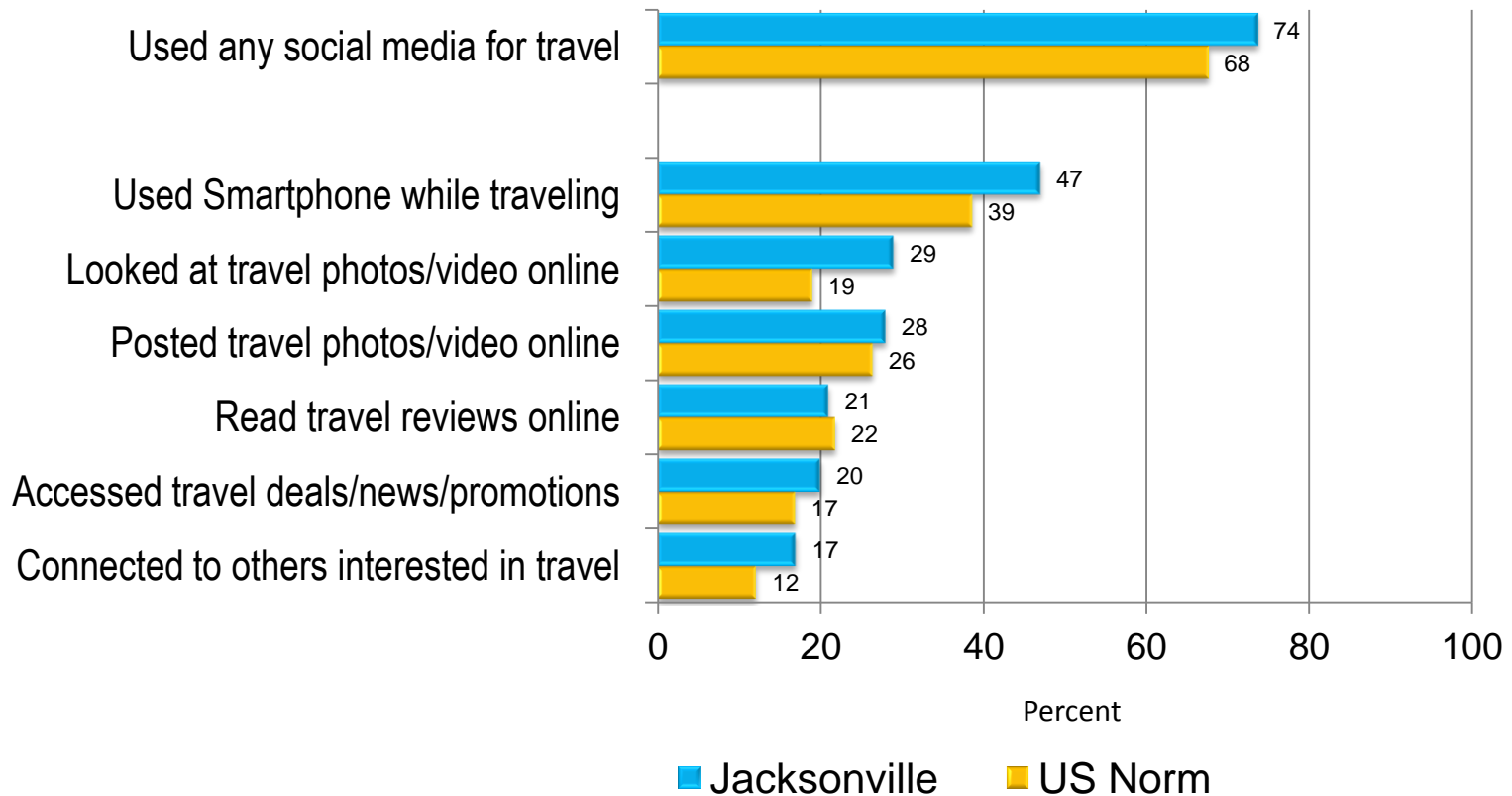
Base: Day Person-Trips



Social Media Use by Travelers



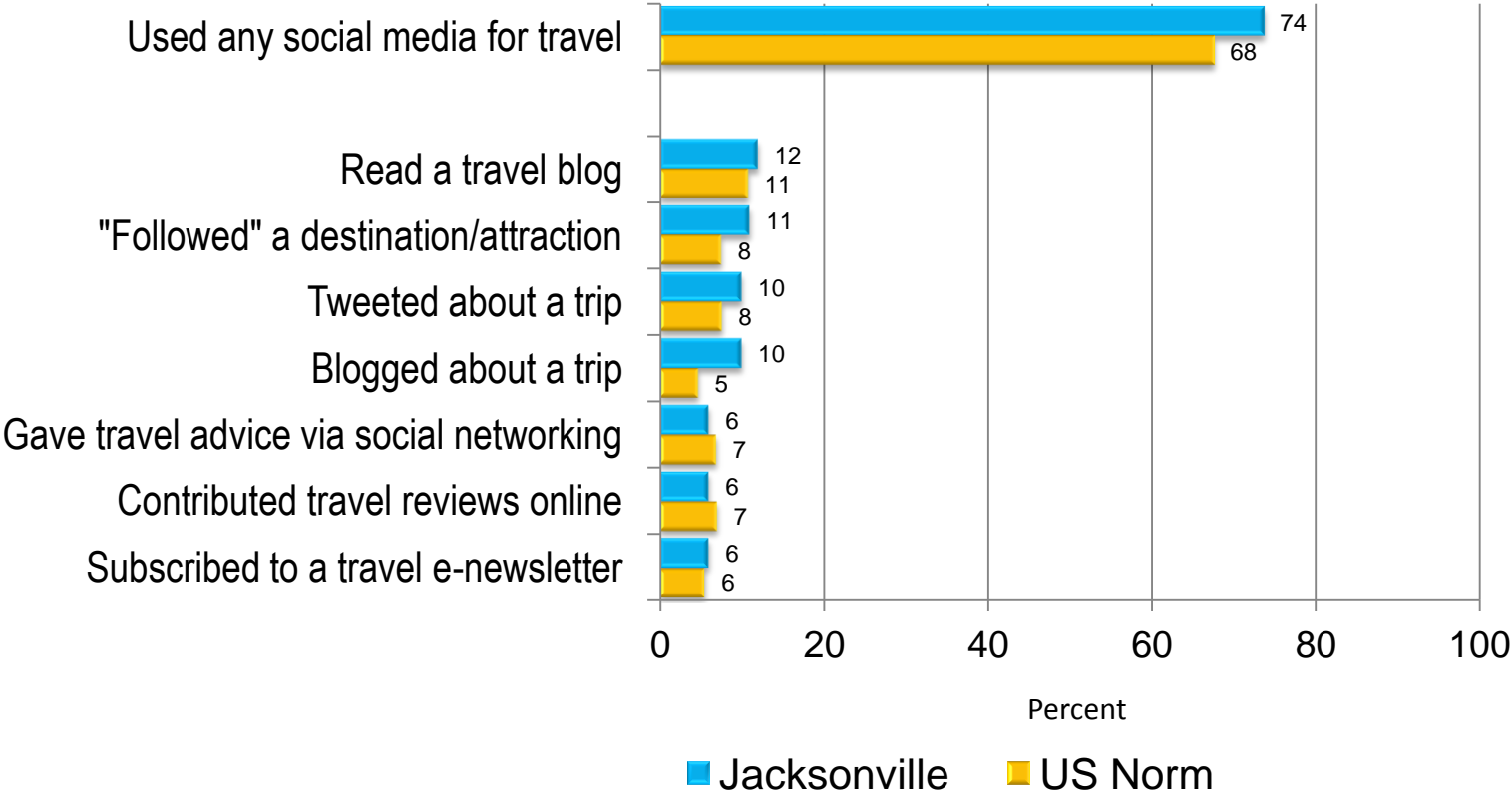
Base: Day Person-Trips



Social Media Use by Travelers (cont'd)



Base: Day Person-Trips



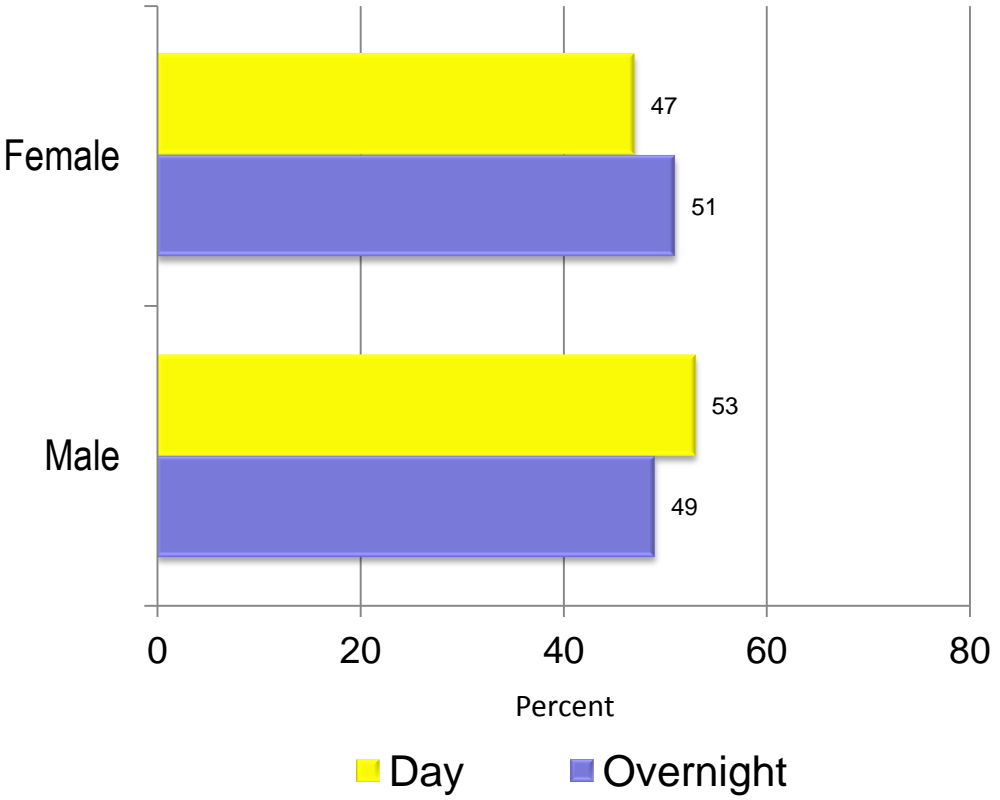


Demographic Profile of Visitors to Jacksonville

Gender



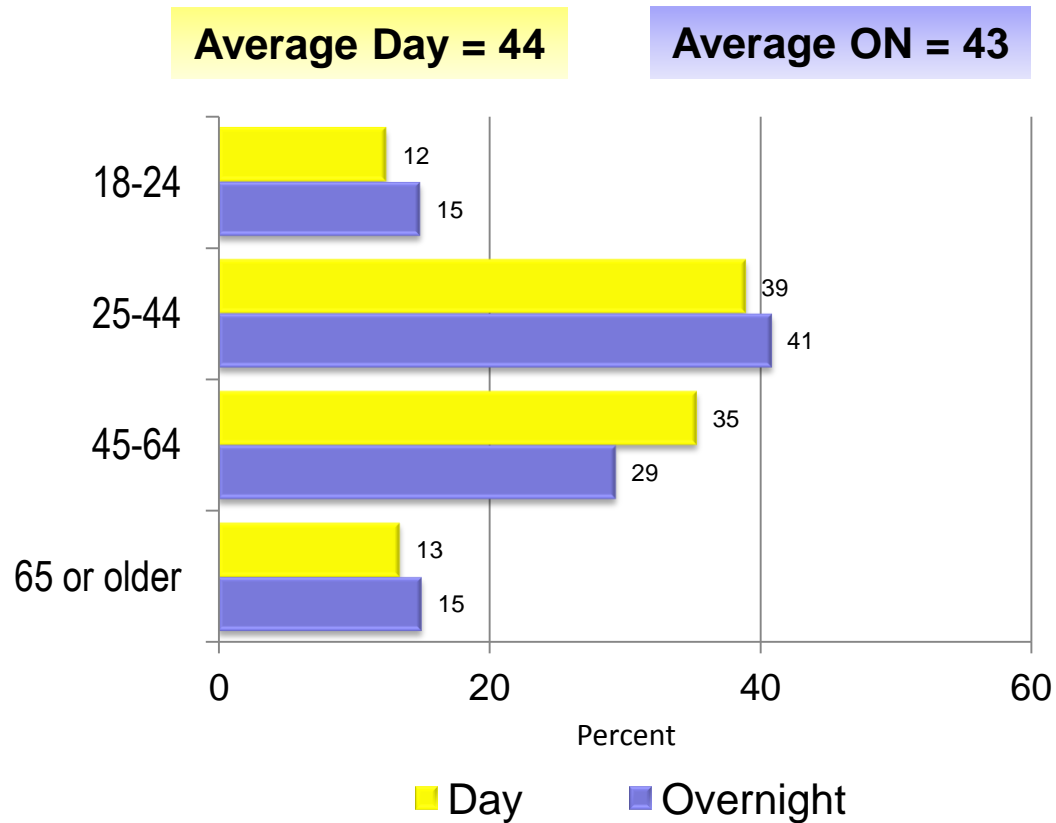
Base: Total Person-Trips to Jacksonville



Age



Base: Total Person-Trips to Jacksonville

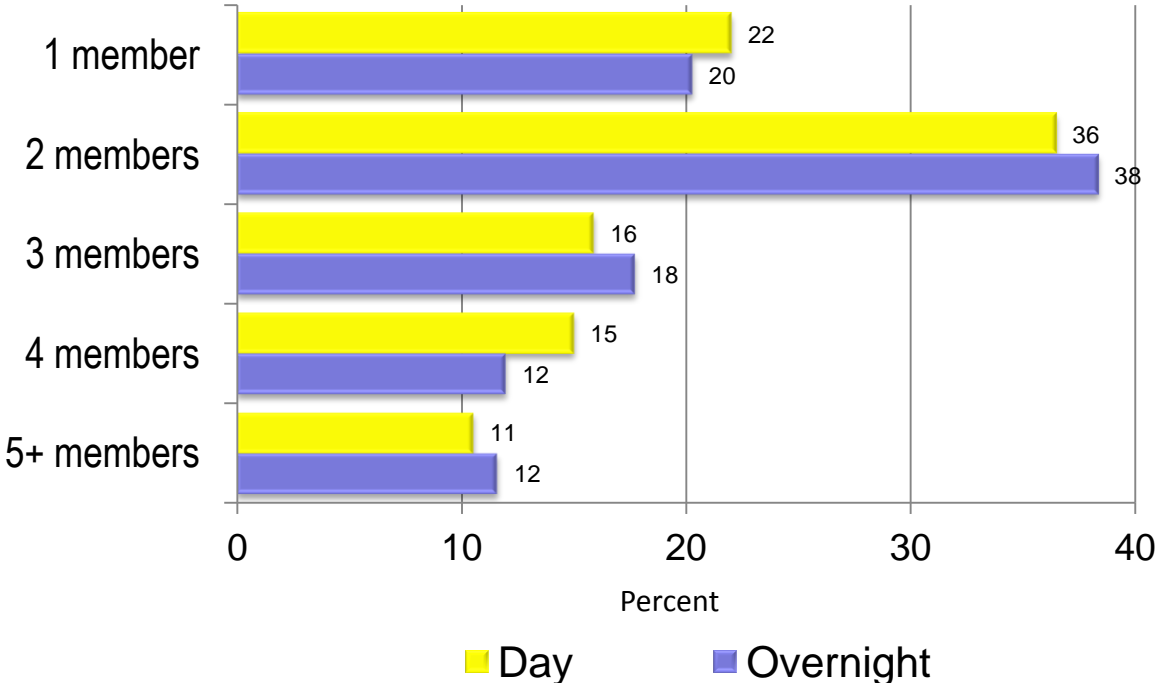


Household Size



Base: Total Person-Trips to Jacksonville

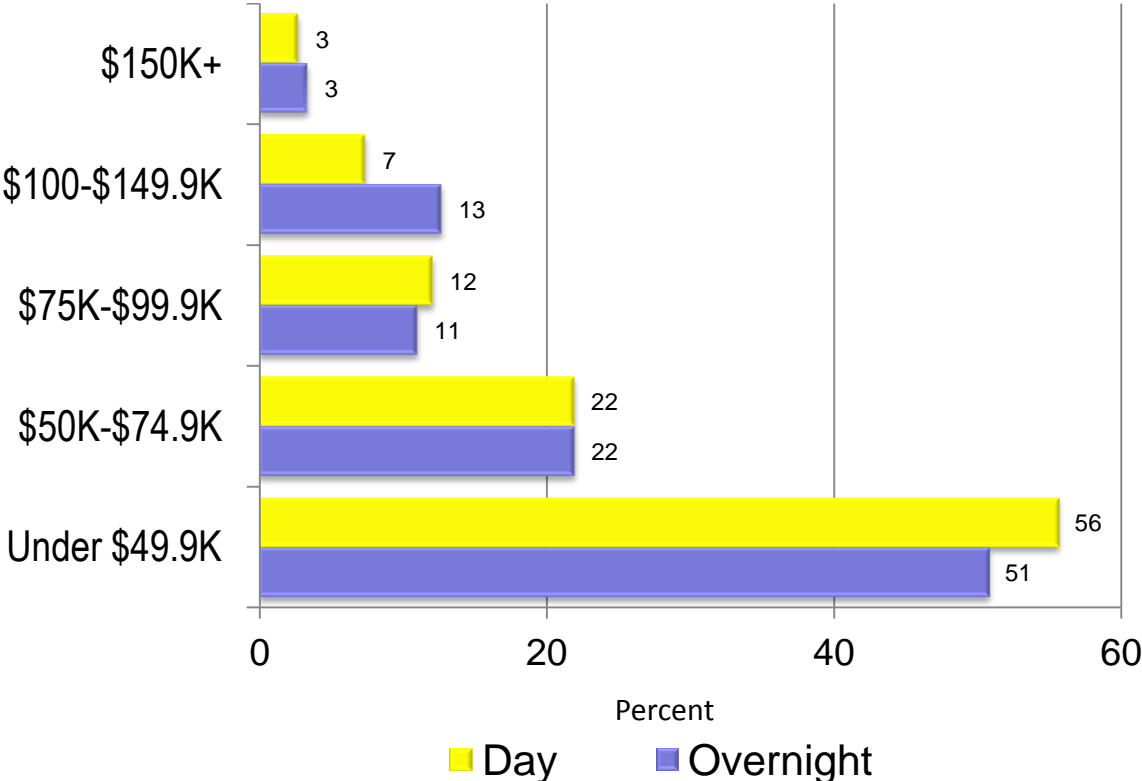
Average Day = 2.6 **Average ON = 2.6**



Household Income



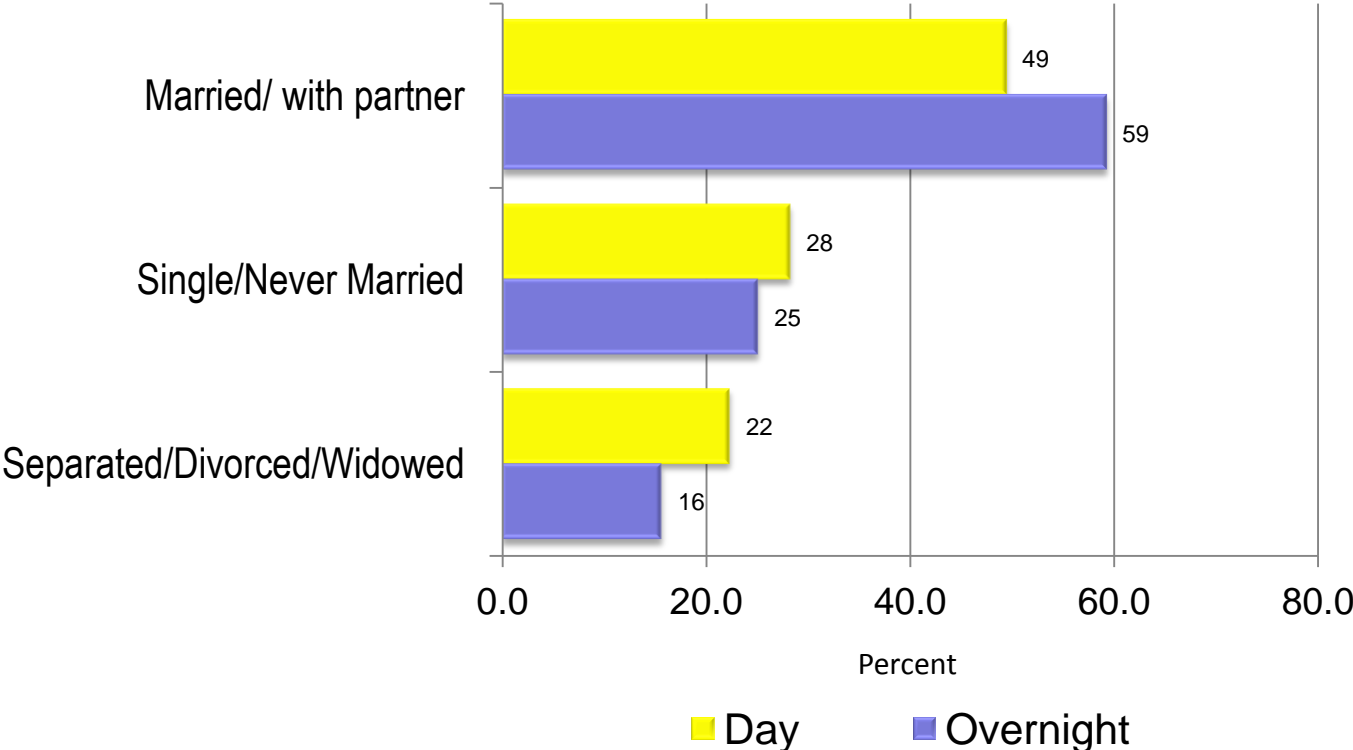
Base: Total Person-Trips to Jacksonville



Marital Status



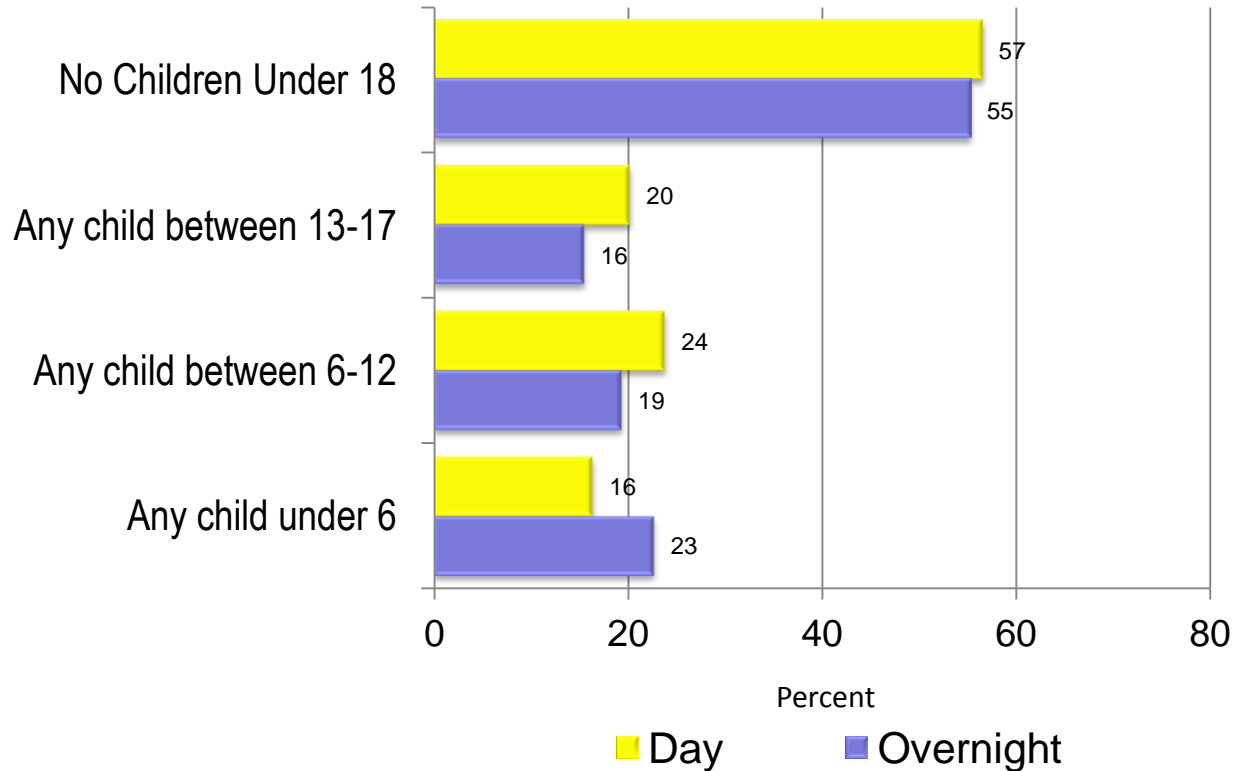
Base: Total Person-Trips to Jacksonville



Children in Household



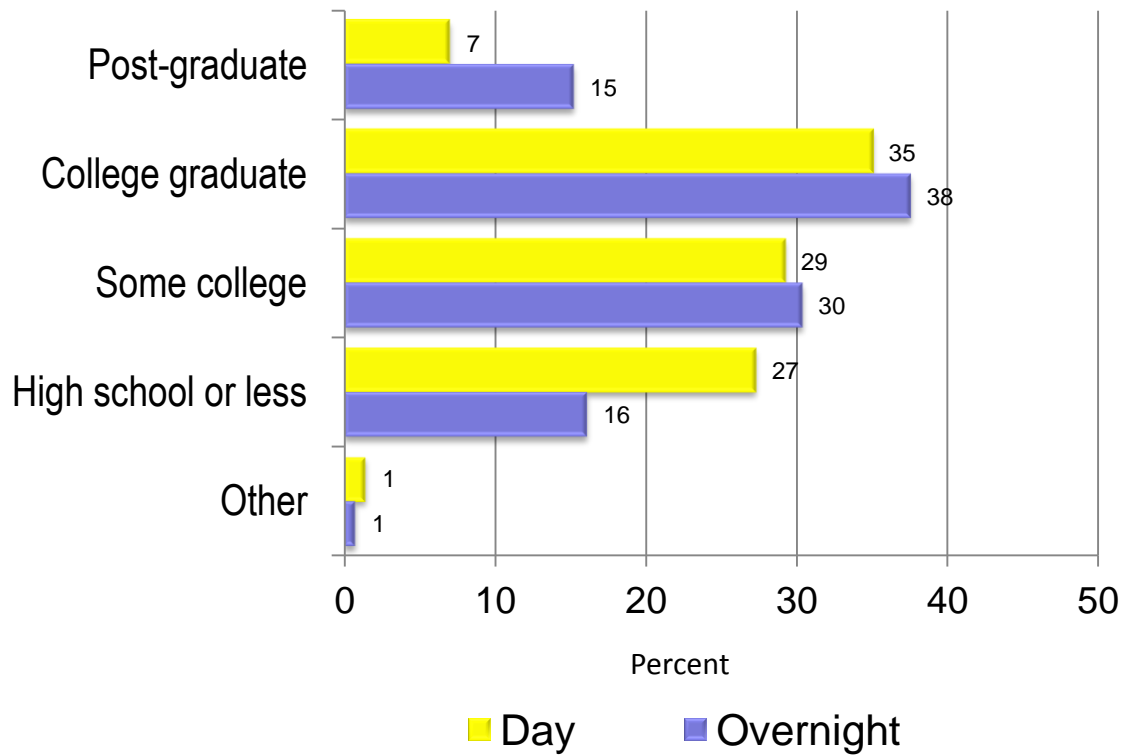
Base: Total Person-Trips to Jacksonville



Education



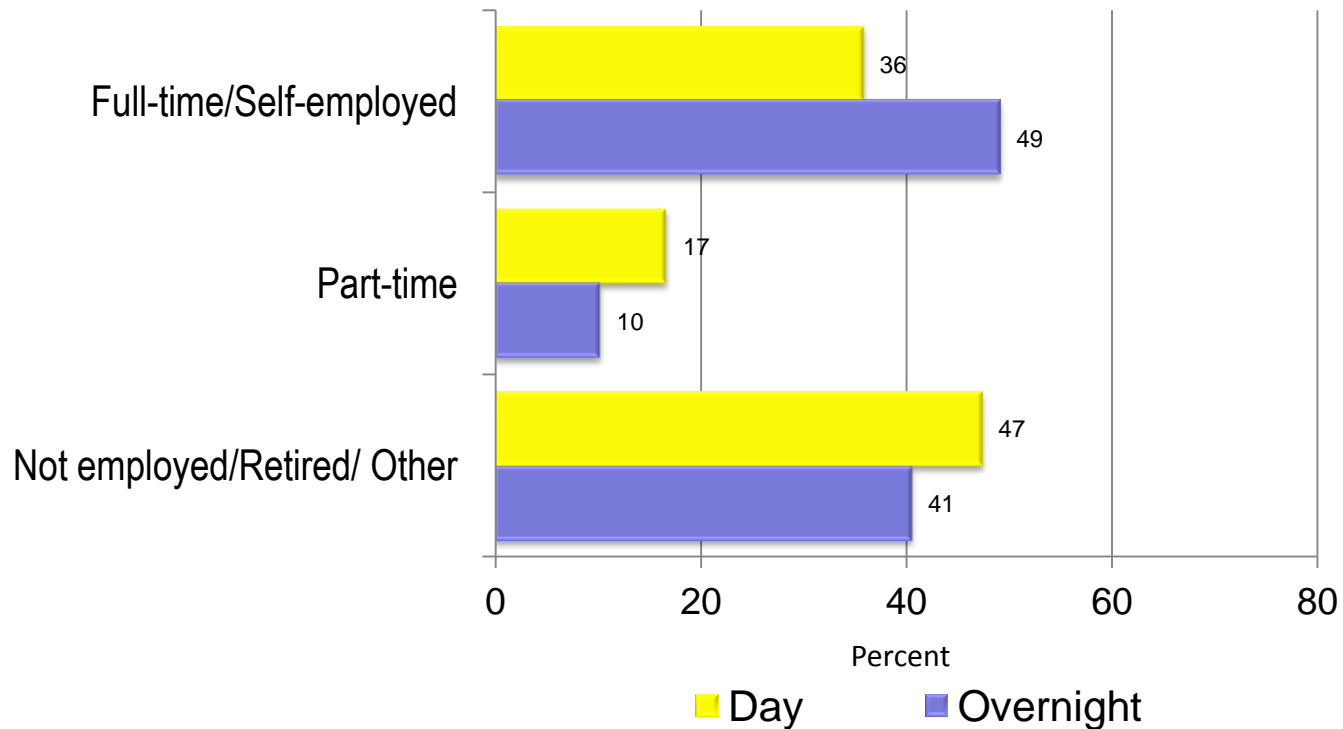
Base: Total Person-Trips to Jacksonville



Employment



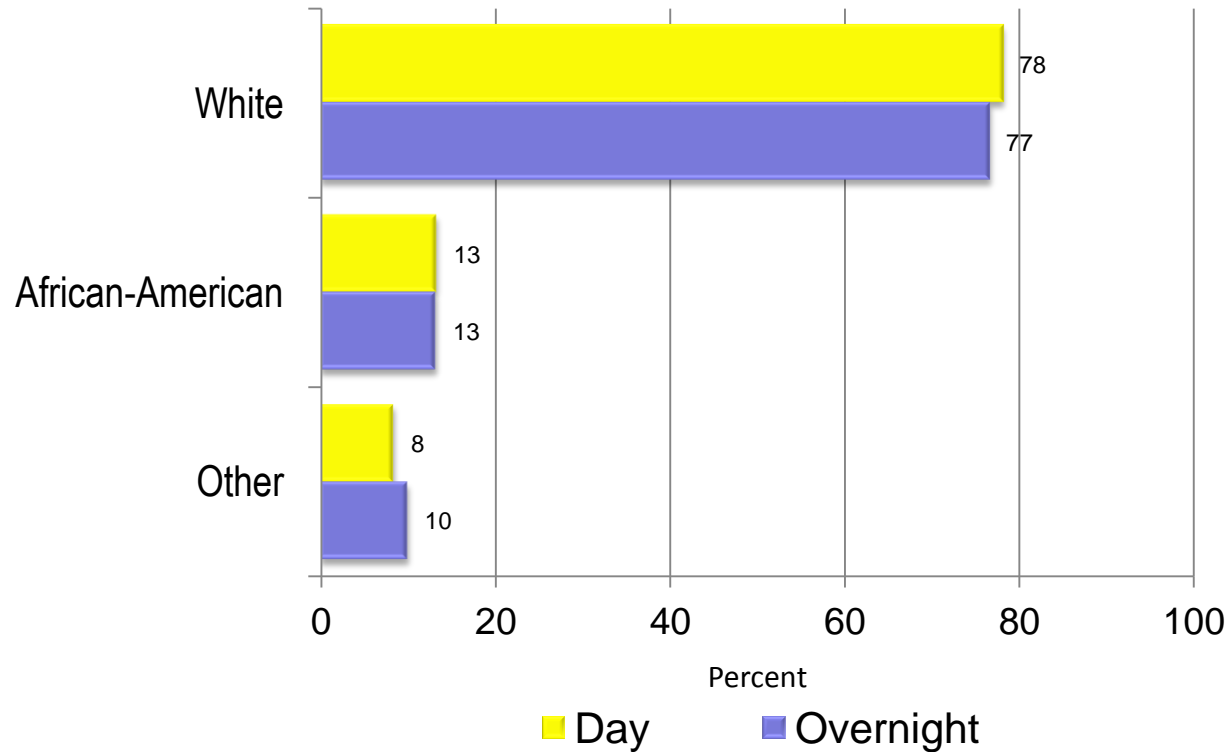
Base: Total Person-Trips to Jacksonville



Race



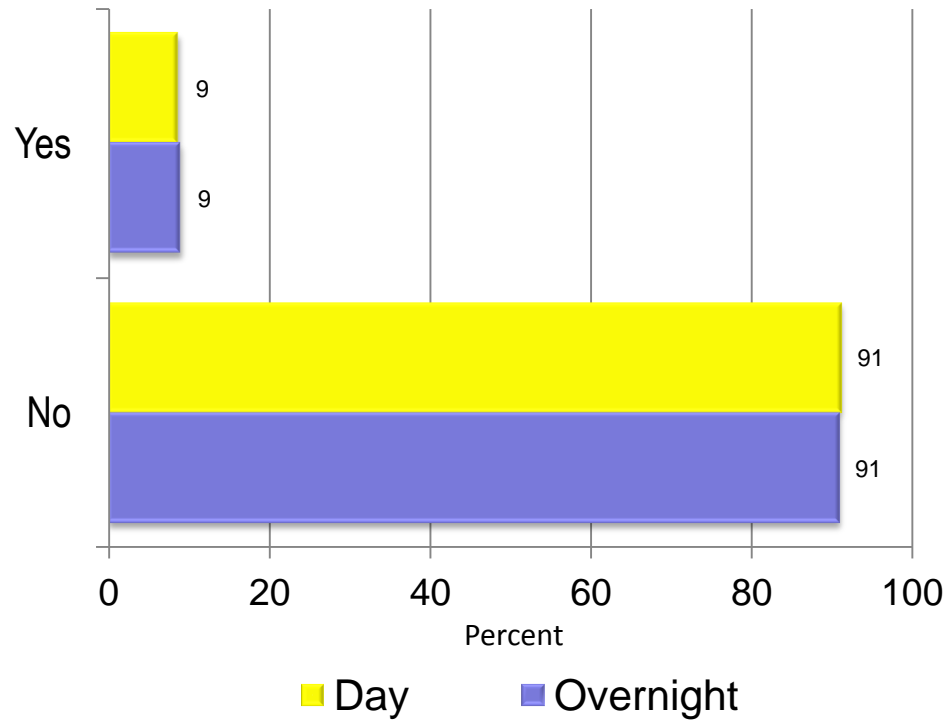
Base: Total Person-Trips to Jacksonville



Hispanic Background



Base: Total Person-Trips to Jacksonville





Appendix A: 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:** includes 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:** includes
 - ◉ *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:

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