



Longwoods
Travel USA®

Jacksonville

2015 Visitor Report

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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 2015.

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*
 - *A profile of Jacksonville's performance within its overnight marketable travel market*
 - *Domestic visitor expenditures in Jacksonville, in co-operation with Tourism Economics*
 - *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 2015 travel year, this yielded :
 - ◉ 337,164 trips for analysis nationally:
 - ◉ 237,555 overnight trips
 - ◉ 99,609 day trips
- ◉ For Jacksonville, the following sample was achieved in 2015:
 - ◉ 1,675 trips:
 - ◉ 1,274 overnight trips
 - ◉ 401 day trips
- ◉ 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 2015, Jacksonville had 20.4 million person trips, increasing 9% from 2013. Of these trips, 48% were overnight trips. The rest were day trips.
- The overnight trips generated \$1.26 billion in spending, increasing 17% from 2013.
- “Visiting friends and relatives” (at 47%) was the most frequent purpose for an overnight trip to Jacksonville. Marketable trips (those influenced by marketing efforts) were 40% of the total overnight trips. Coming for a “special event such as fair, festival or sports event” and to visit a “theme park” were the highest marketable trip purposes.
- For overnight trips, the top state markets for Jacksonville visitors were Florida, Georgia, and New York. Among DMAs, the top three visitor sources were Jacksonville, Orlando, and New York.

Key Findings



- Three-fourths (75%) of Jacksonville visitors, were very satisfied with the overall trip experience. Most satisfaction elements were similar to the national average. Satisfaction with the “quality of food” was higher than the national average.
- Of the overnight respondents, 67% have visited Jacksonville at least once. Sixty-four (64%) percent had visited in the past year.
- Similar to the national average, over half (51%) of the overnight trips were planned 2 months or less before the trip. Also, similar to the national average, thirteen percent (13%) did not plan anything in advance.
- “Online travel agencies,” “hotel or resort”, and “advice from relatives or friends”, and were the most common planning sources for a Jacksonville overnight trip. “Hotel or resort” and “online travel agencies” were the most common booking sources.

Key Findings – (Cont'd)



- The average number of nights spent in Jacksonville for an overnight trip was 3.0 nights, up from 2.8 nights in 2013. The average travel party size was 2.9 persons.
- Over two-thirds (68%) of overnight Jacksonville travelers arrived by personal car or truck.
- The top five overnight trip Jacksonville activities and experiences were “Shopping,” “Beach,” “Swimming,” “Fine Dining,” and “Theme Park.”
- The highest social media activities on an overnight trip to Jacksonville were “posting photos online,” “reading travel reviews,” “looking at photos online,” and “accessing the internet to learn about travel deals, news, events, or promotions.” The usage of social media on the overnight trip was similar to 2013.

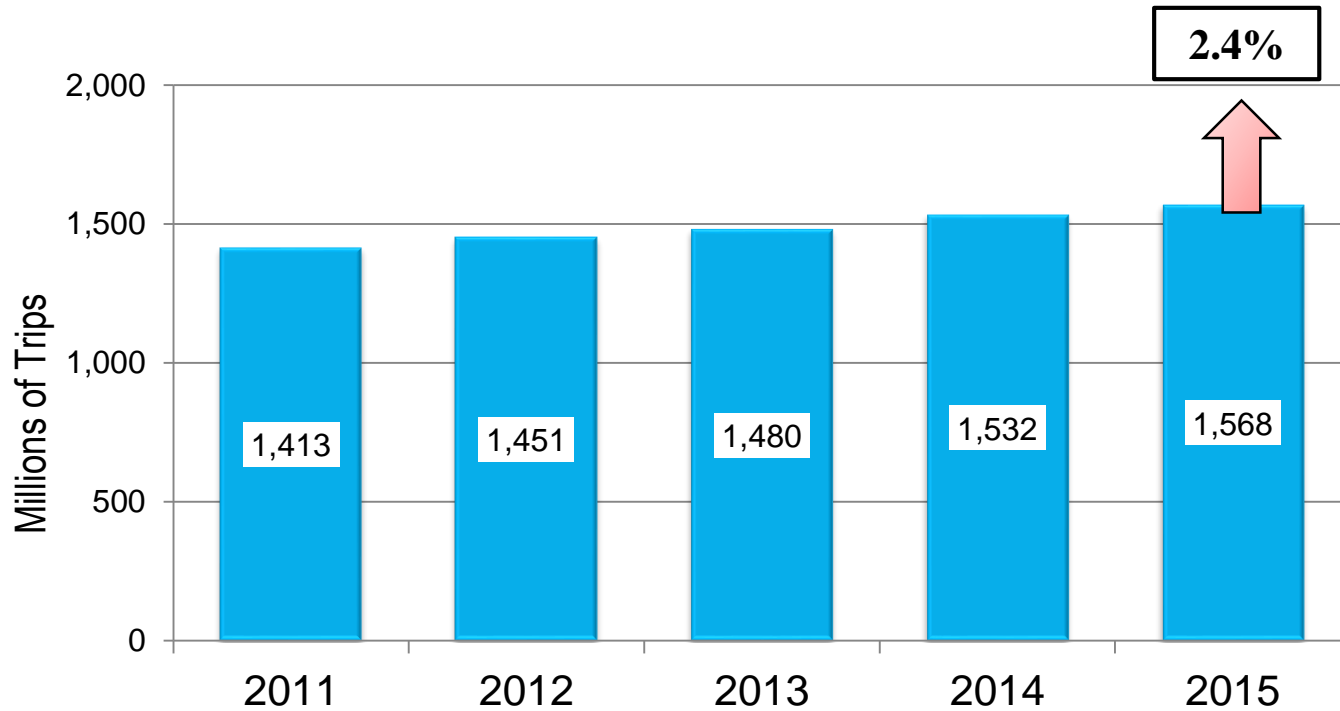


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



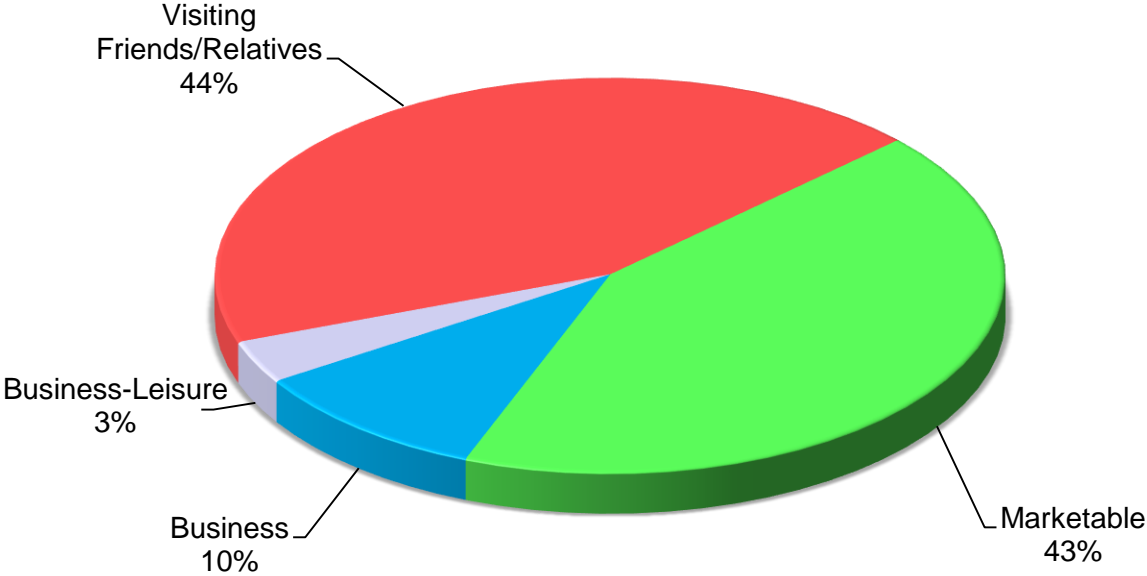
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2015 Overnight Trips



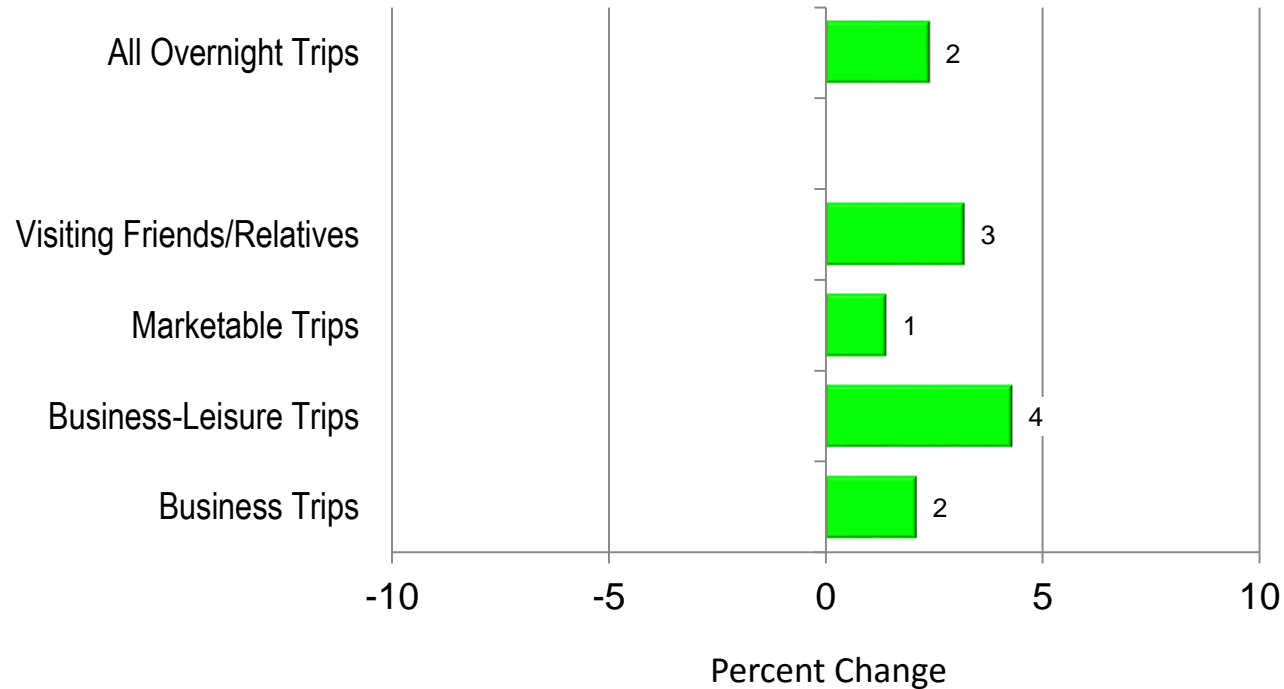
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2015 vs. 2014



Base: Total Overnight Person-Trips





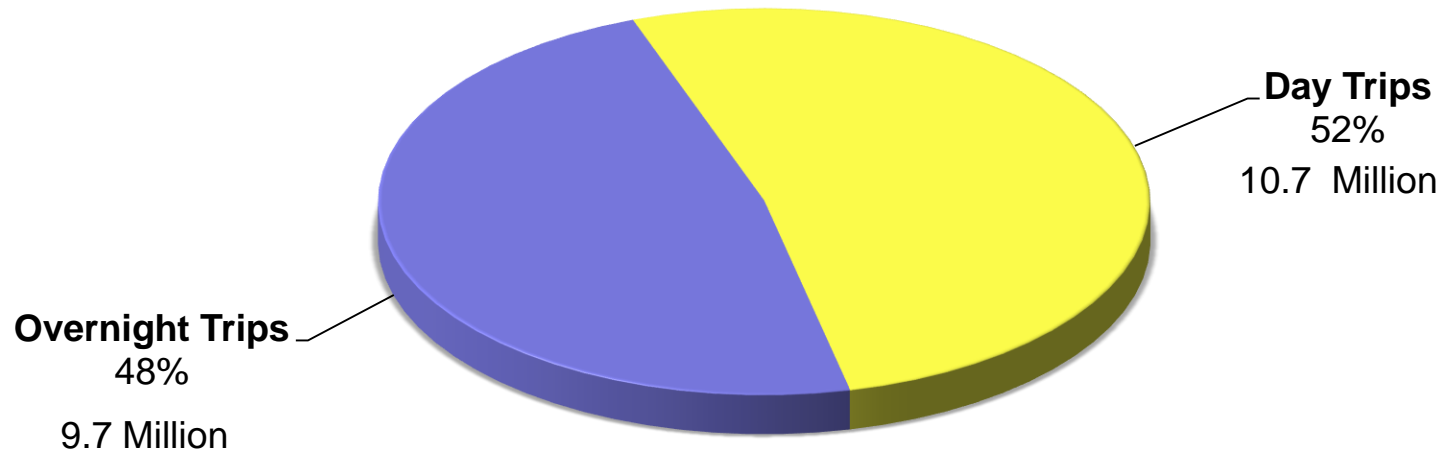
Size & Structure of Jacksonville Domestic Travel Market

Total Size of Jacksonville Domestic Travel Market in 2015



Total Person-Trips = 20.4 Million

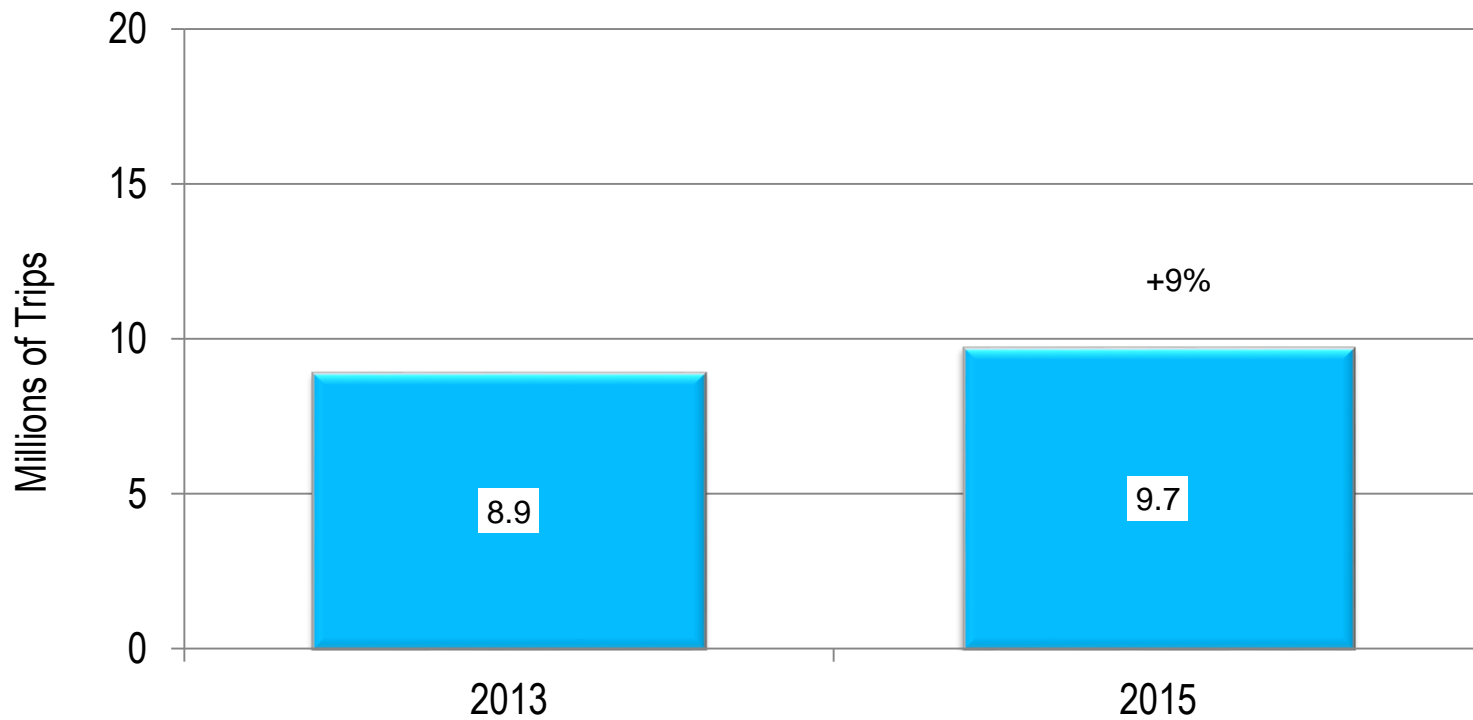
+9.0% vs. 2013



Overnight Trips to Jacksonville



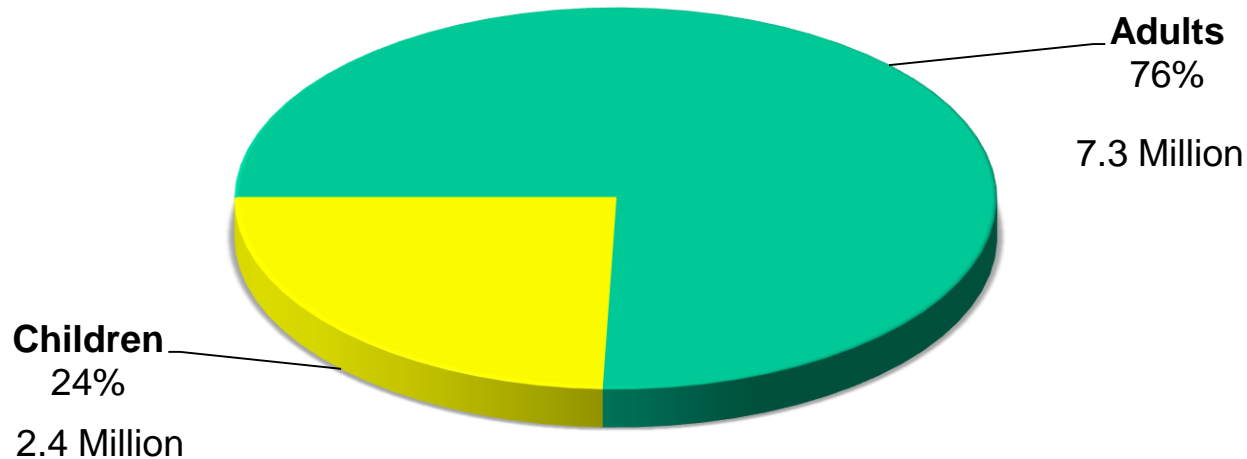
Base: Total Overnight Person-Trips to Jacksonville



Size of Jacksonville Overnight Travel Market – Adults vs. Children



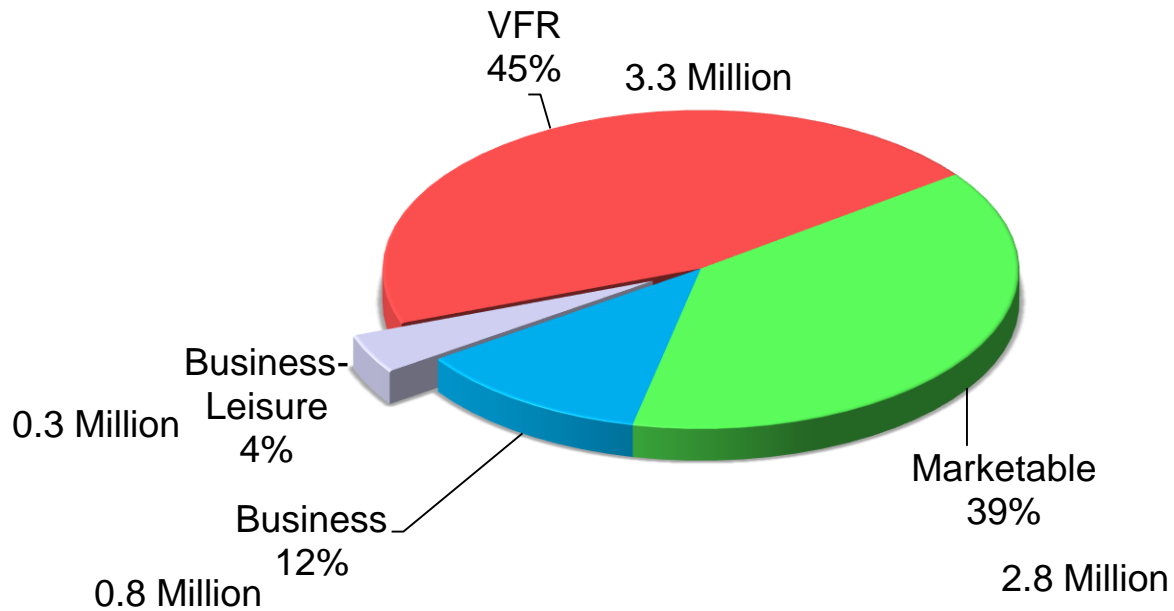
Total Overnight Person-Trips = 9.7 Million



Jacksonville Overnight Travel Market — by Main Trip Purpose



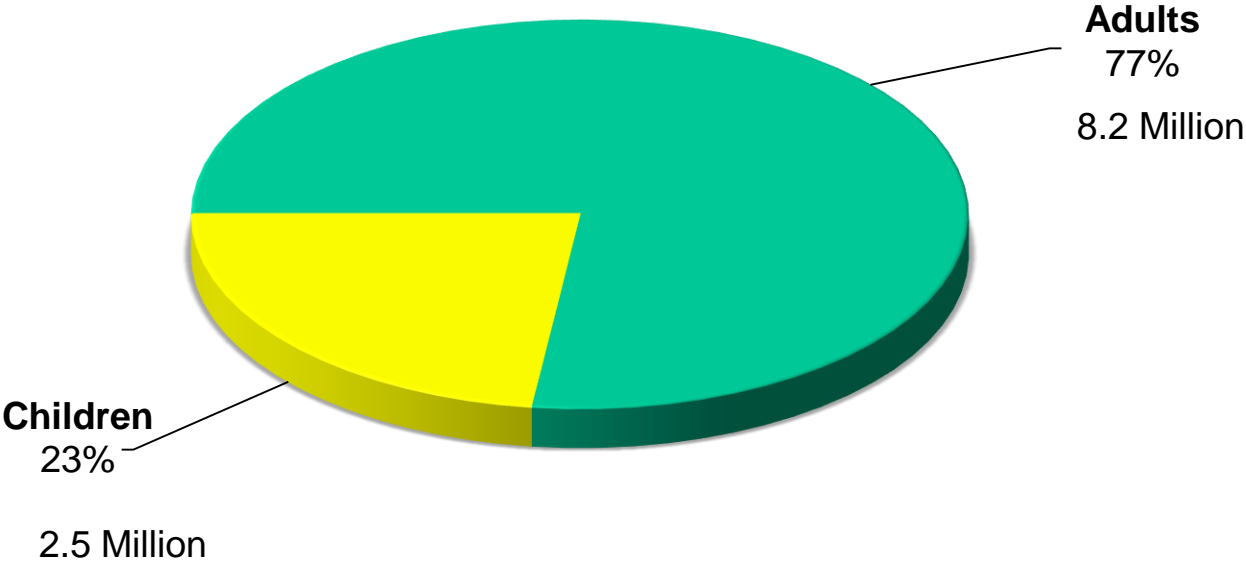
Adult Overnight Person-Trips = 7.3 Million



Size of Jacksonville Day Travel Market — Adults vs. Children



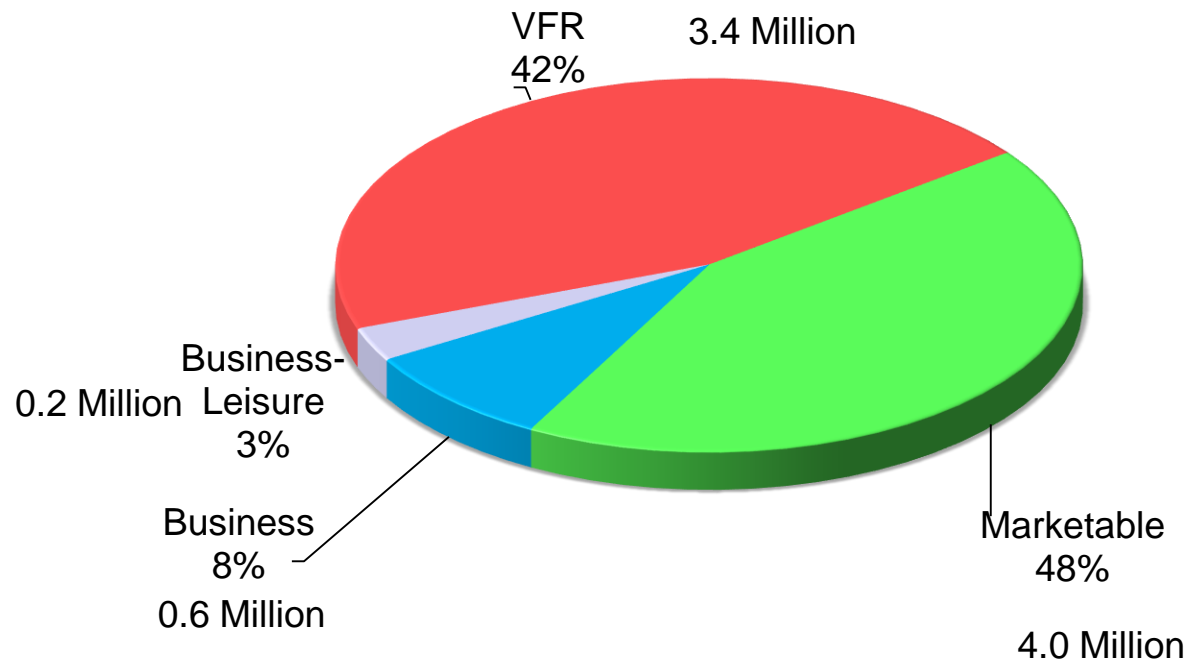
Total Day Person-Trips = 10.7 Million



Jacksonville Day Travel Market – by Trip Purpose



Adult Day Person-Trips = 8.2 Million





Overnight Trip Detail



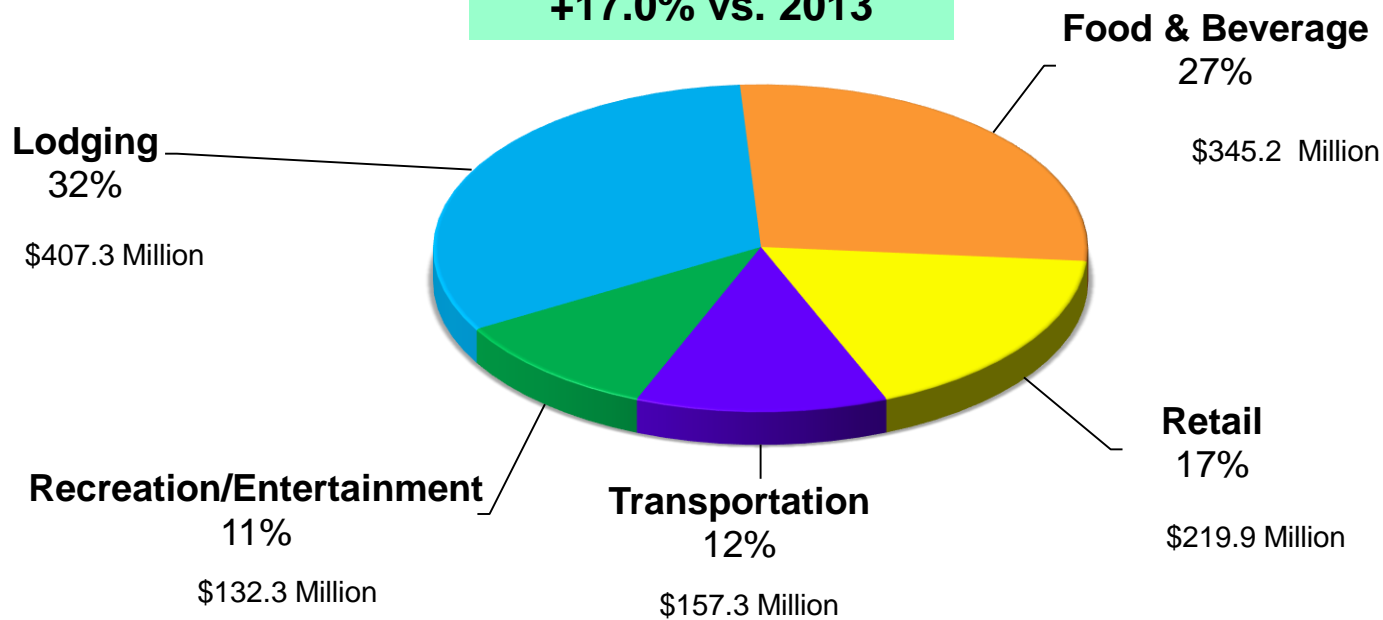
Overnight Trip Expenditures

Total Domestic Jacksonville Overnight Spending – by Sector



Total Spending = \$1.262 Billion

+17.0% vs. 2013

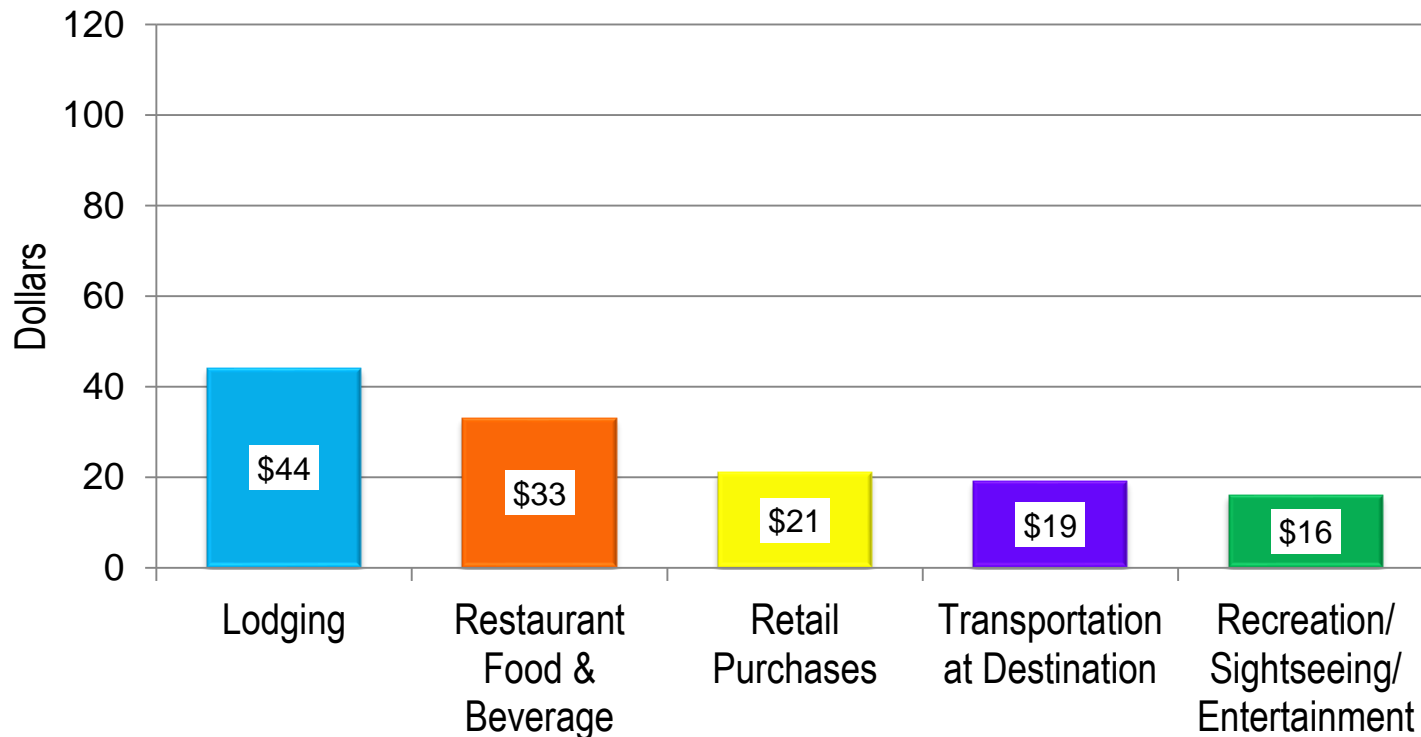


Source: Tourism Economics

Average Per Person Expenditures on Domestic Overnight Trips – By Sector



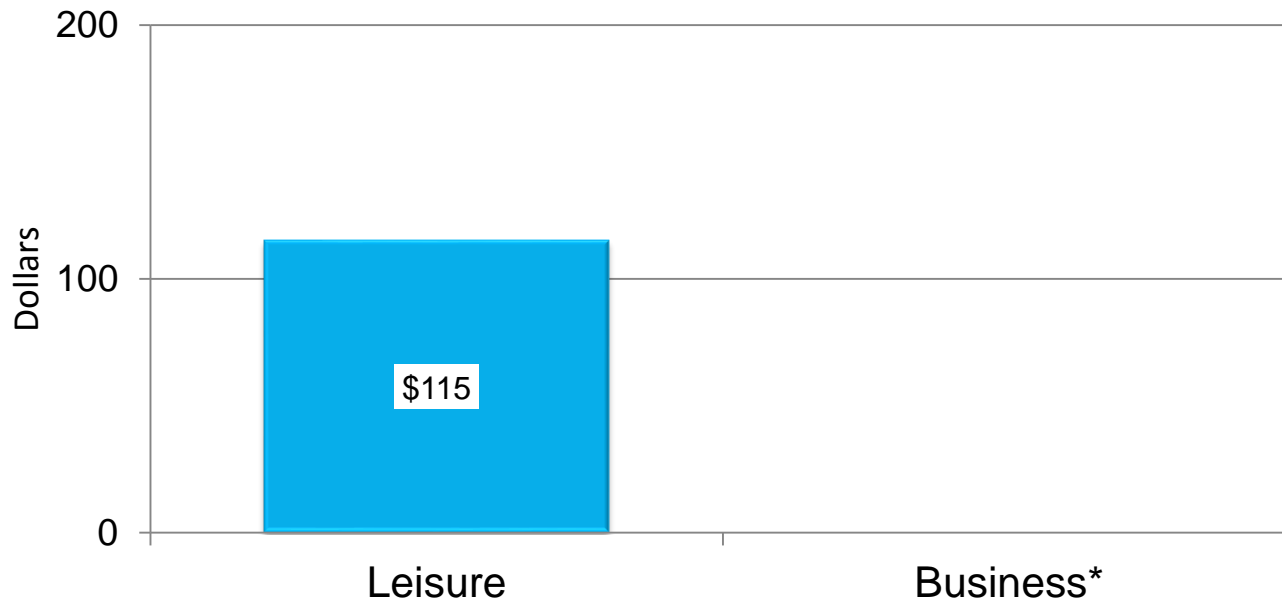
Base: Total Overnight Person-Trips to Jacksonville



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



Base: Total Overnight Person-Trips to Jacksonville

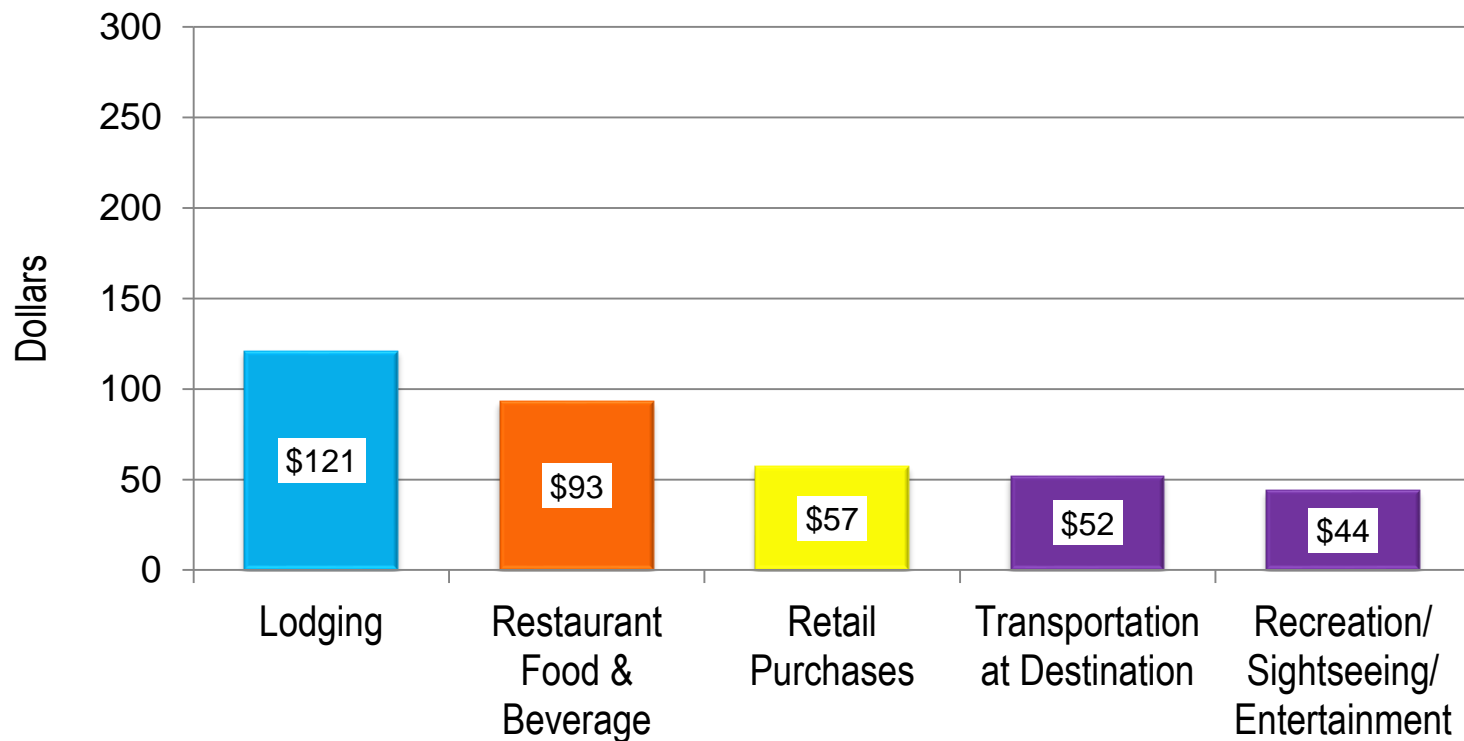


* Low base sizes

Average Per Party Expenditures on Domestic Overnight Trips – By Sector



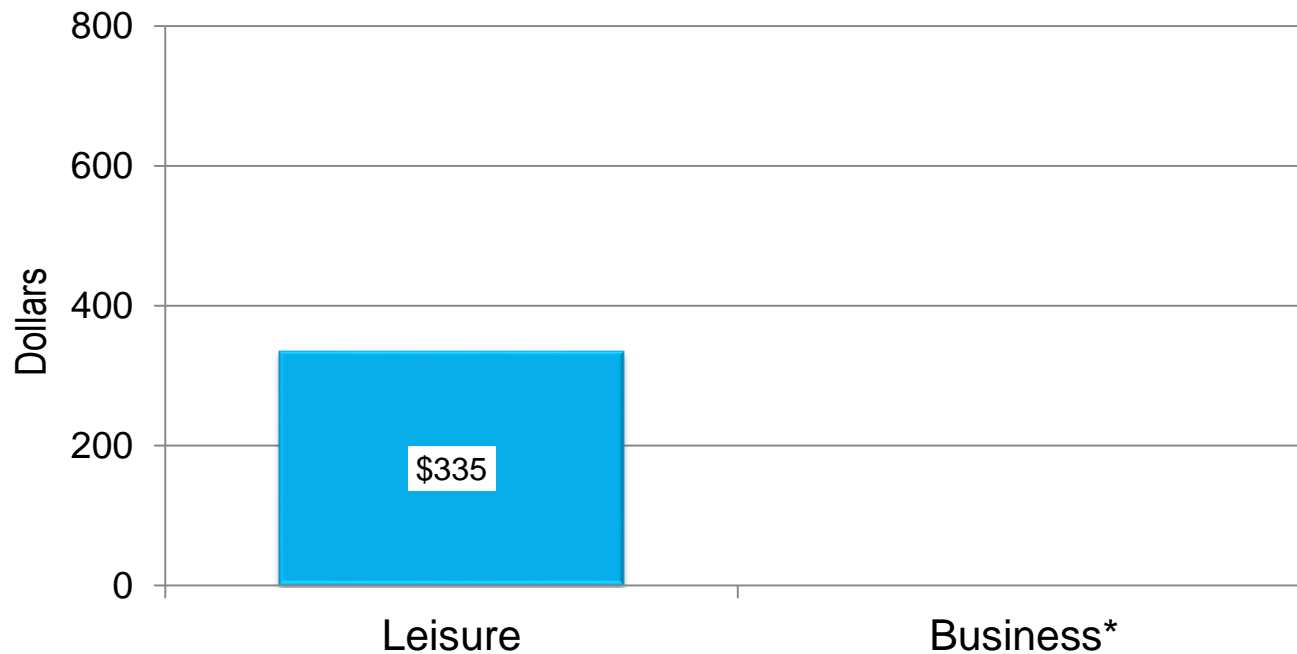
Base: Total Overnight Person-Trips to Jacksonville



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



Base: Total Overnight Person-Trips to Jacksonville



* Low base sizes

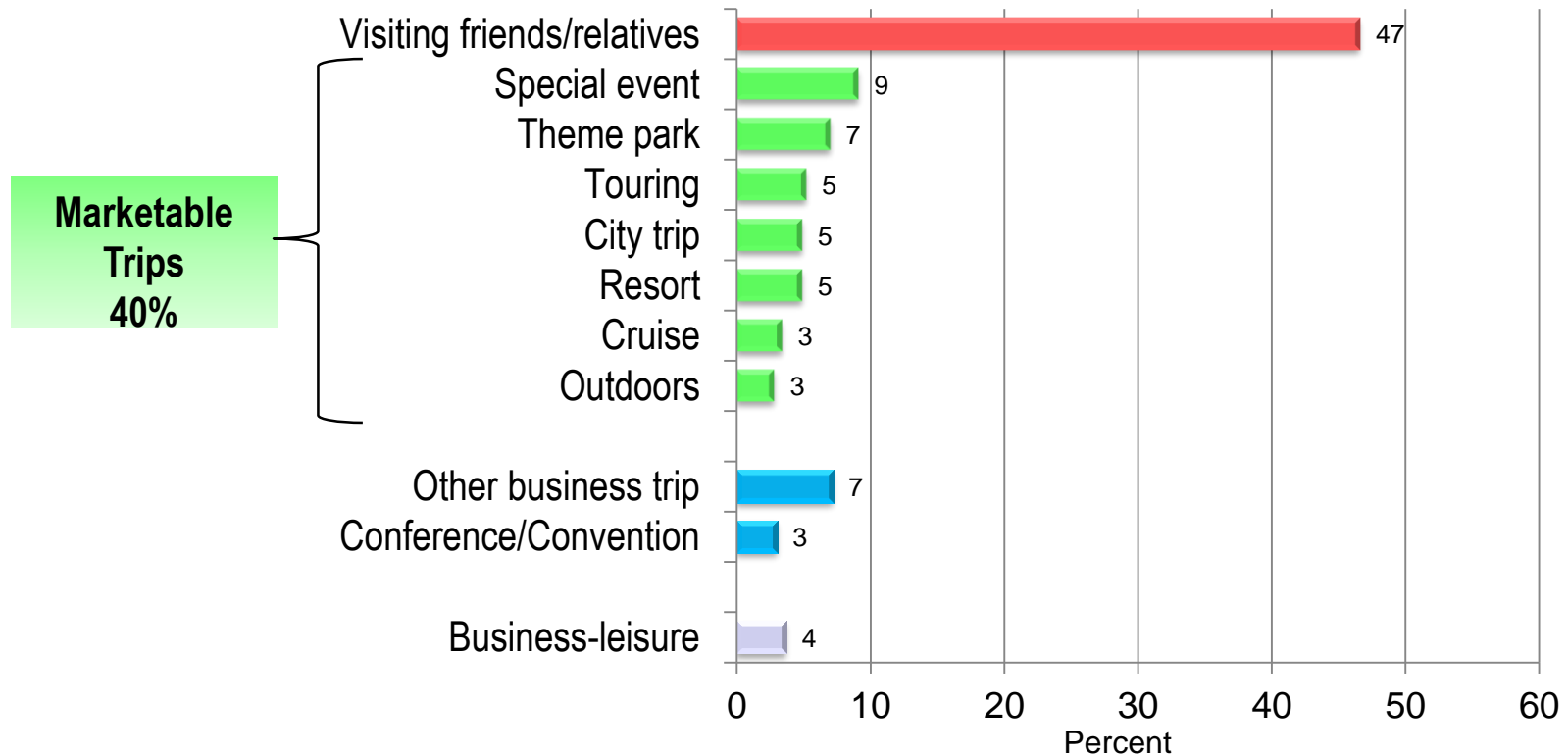


Overnight Trip Characteristics

Main Purpose of Trip



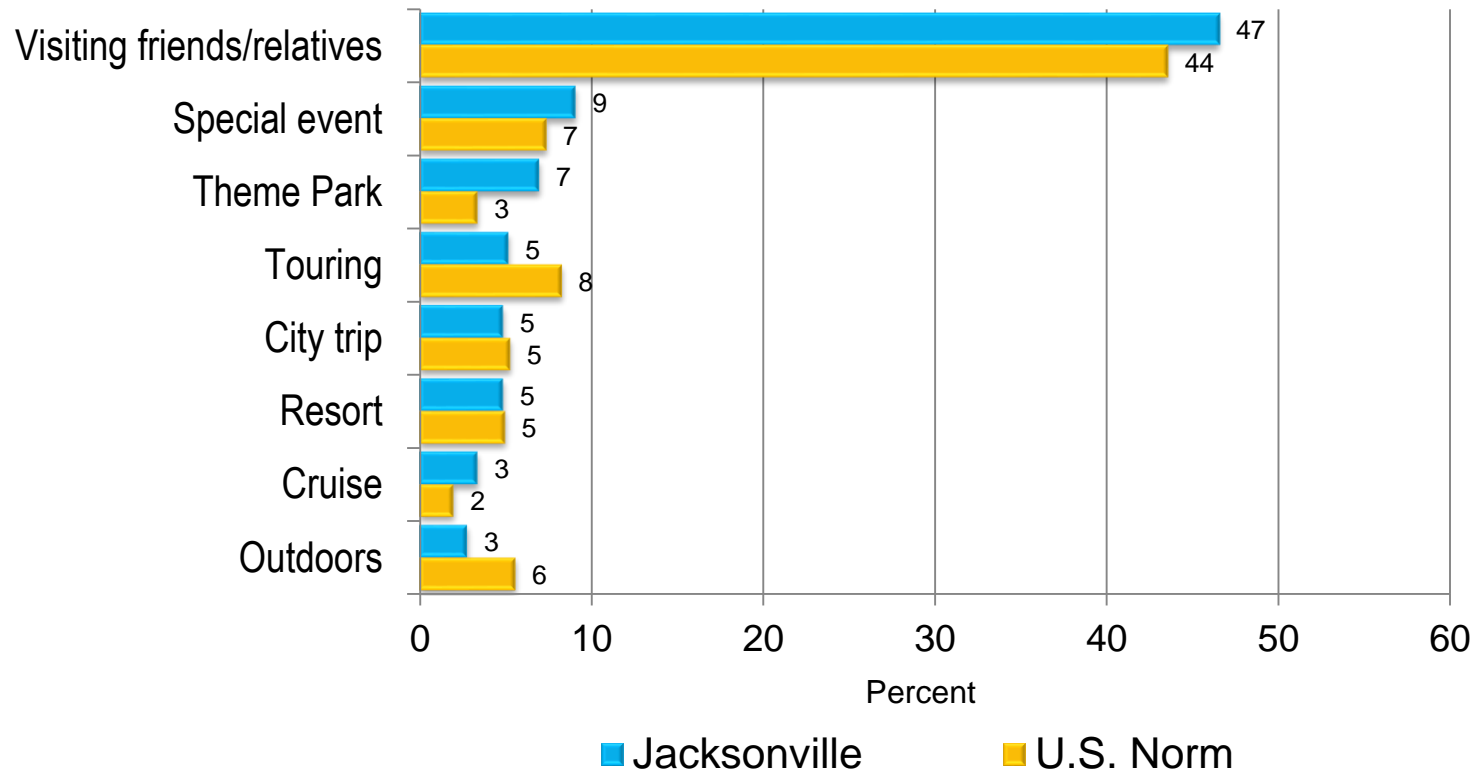
Base: Total Overnight Person-Trips to Jacksonville



Main Purpose of Leisure Trip – Jacksonville vs. National Norm



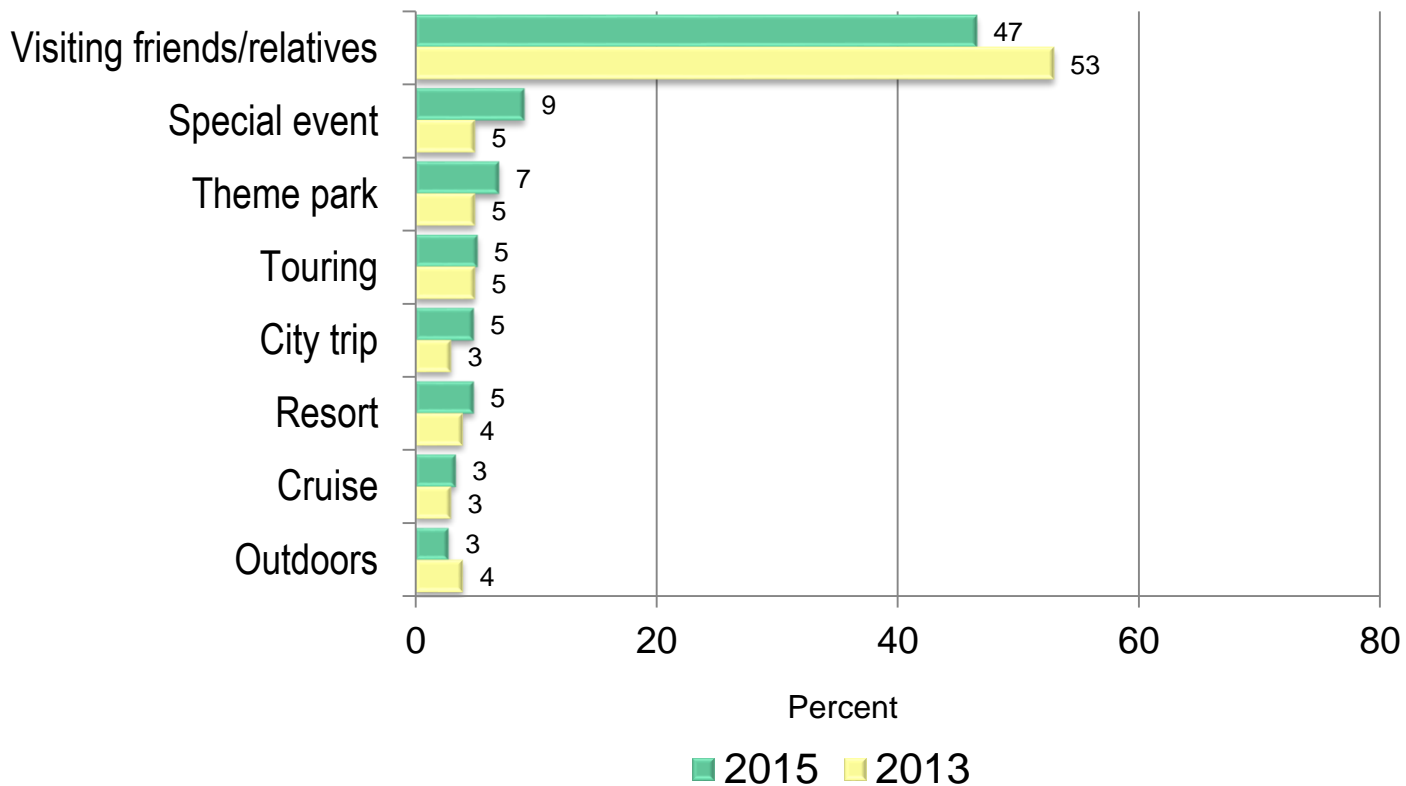
Base: Total Overnight Person-Trips



Main Purpose of Overnight Leisure Trip to Jacksonville – 2015 vs. 2013



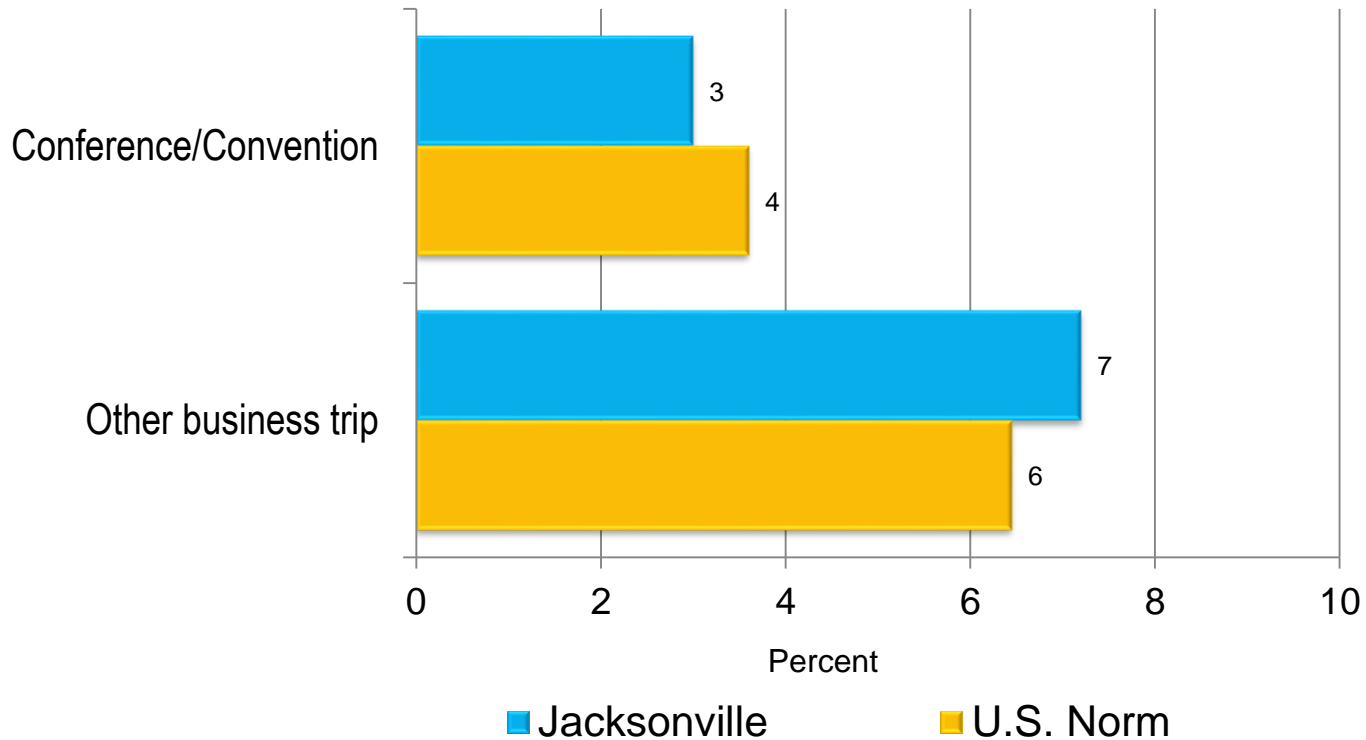
Base: Total Overnight Person-Trips to Jacksonville



Main Purpose of Business Trip – Jacksonville vs. National Norm



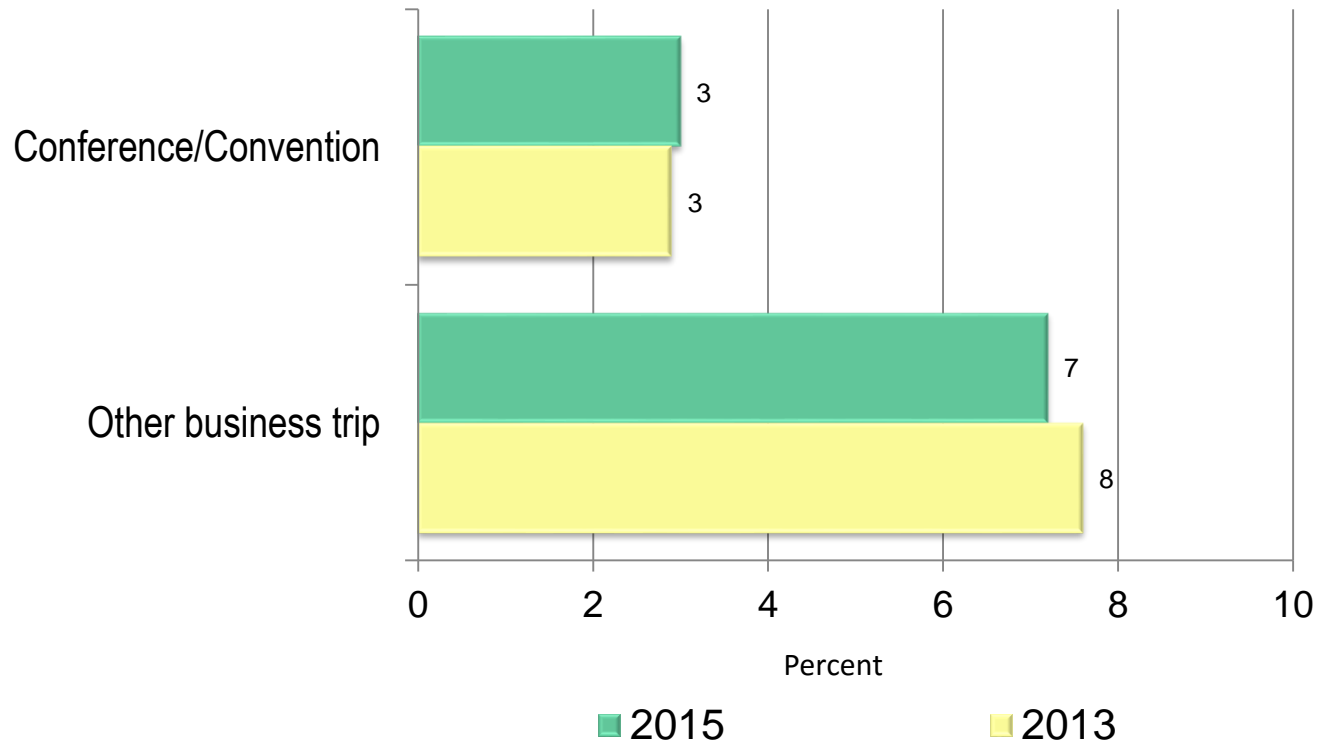
Base: Total Overnight Person-Trips



Main Purpose of Overnight Business Trip to Jacksonville – 2015 vs. 2013



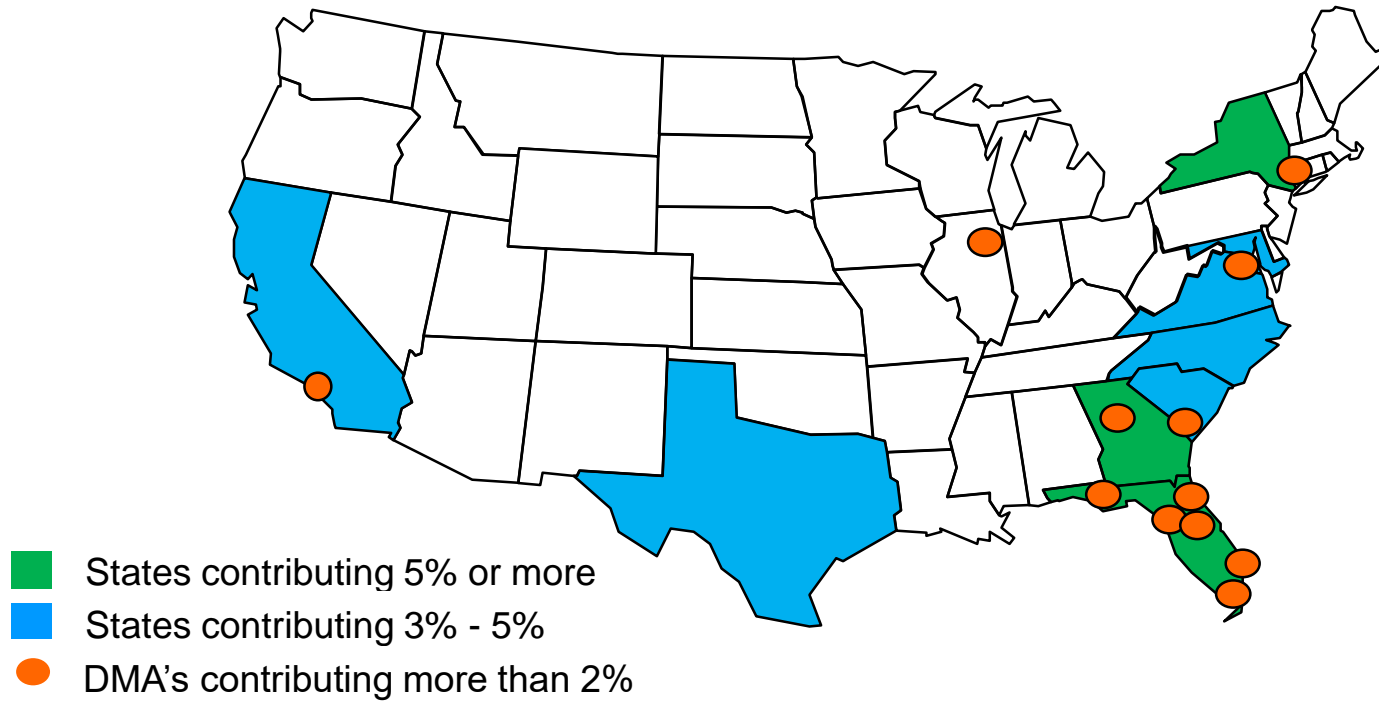
Base: Total Overnight Person-Trips to Jacksonville



Sources of Business



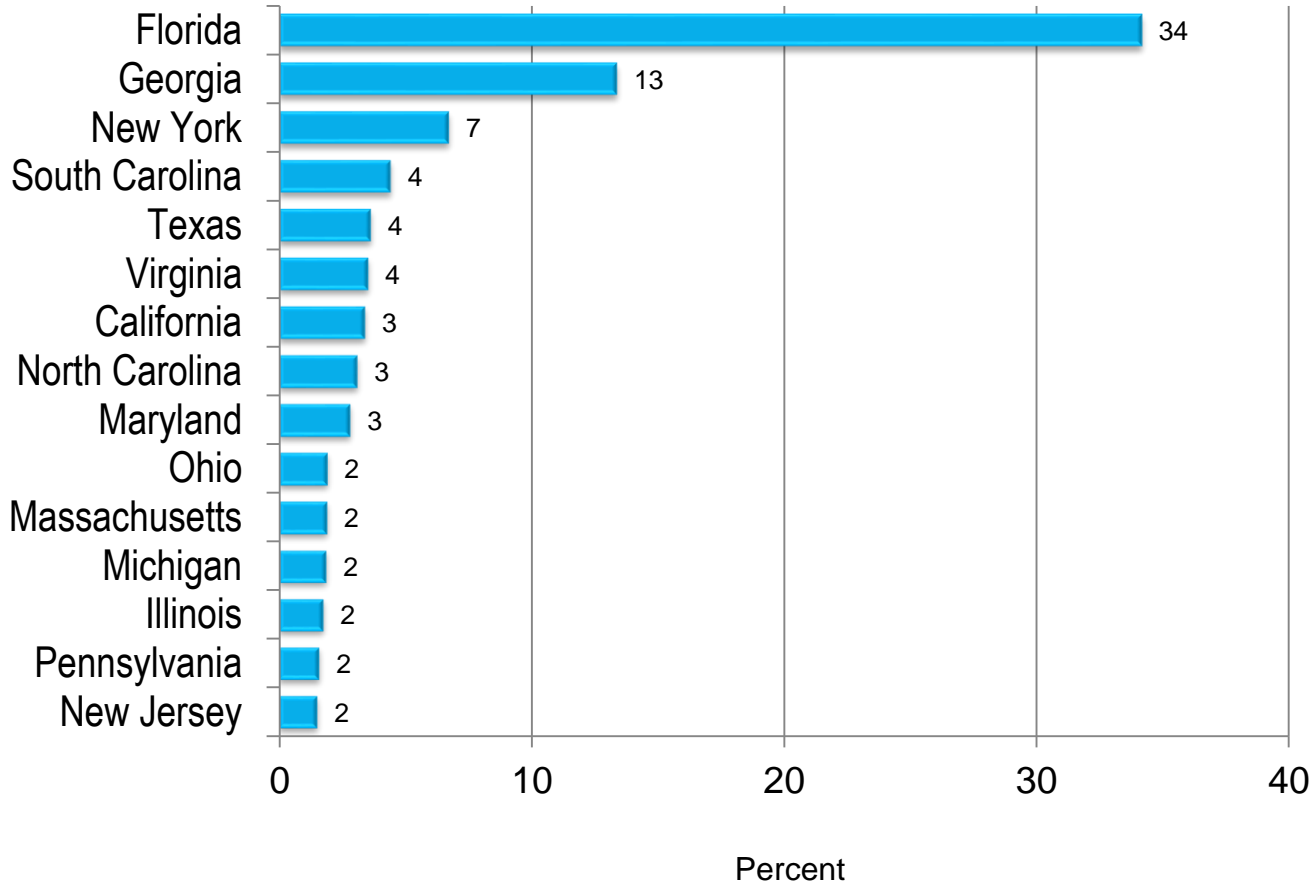
Base: Overnight Person-Trips to Jacksonville



State Origin Of Trip



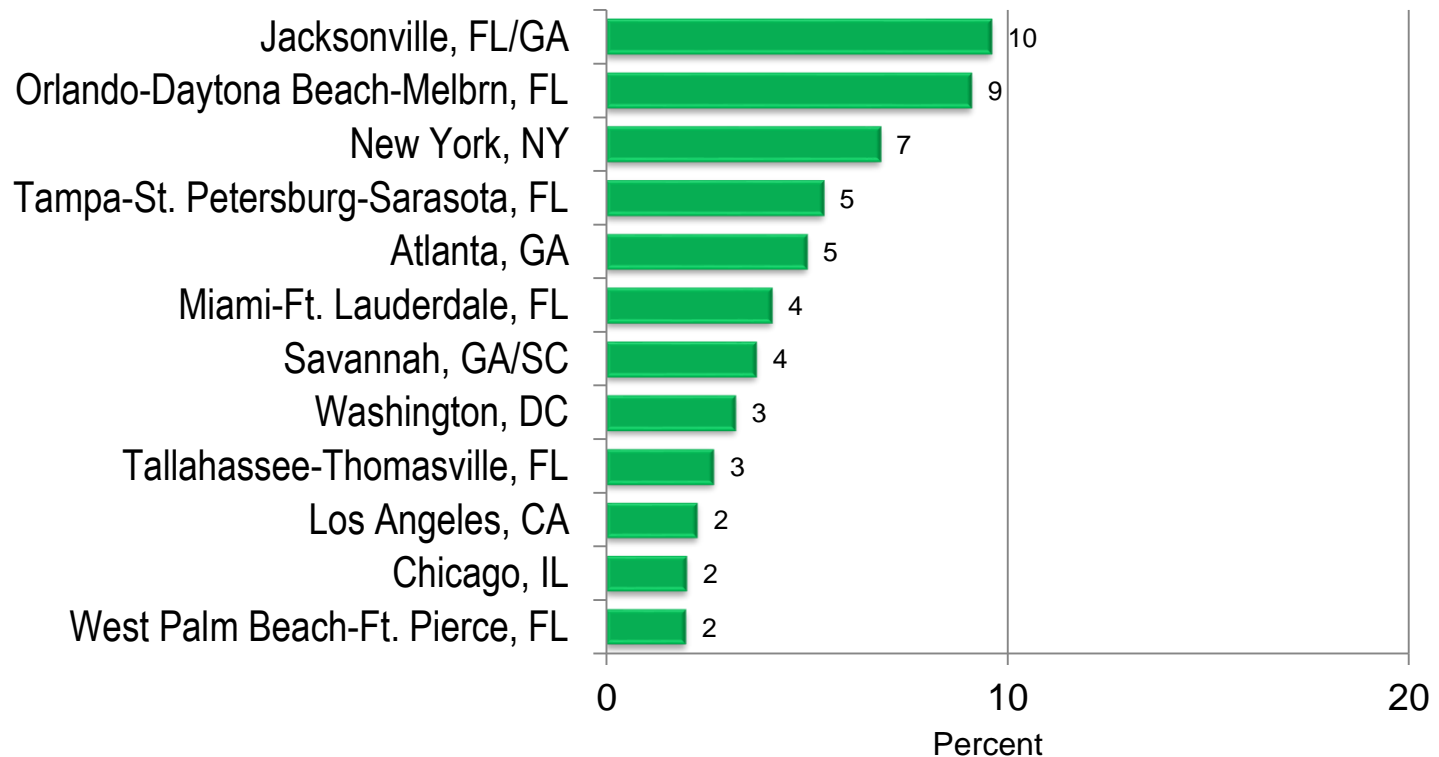
Base: Total Overnight Person-Trips to Jacksonville



DMA Origin Of Trip



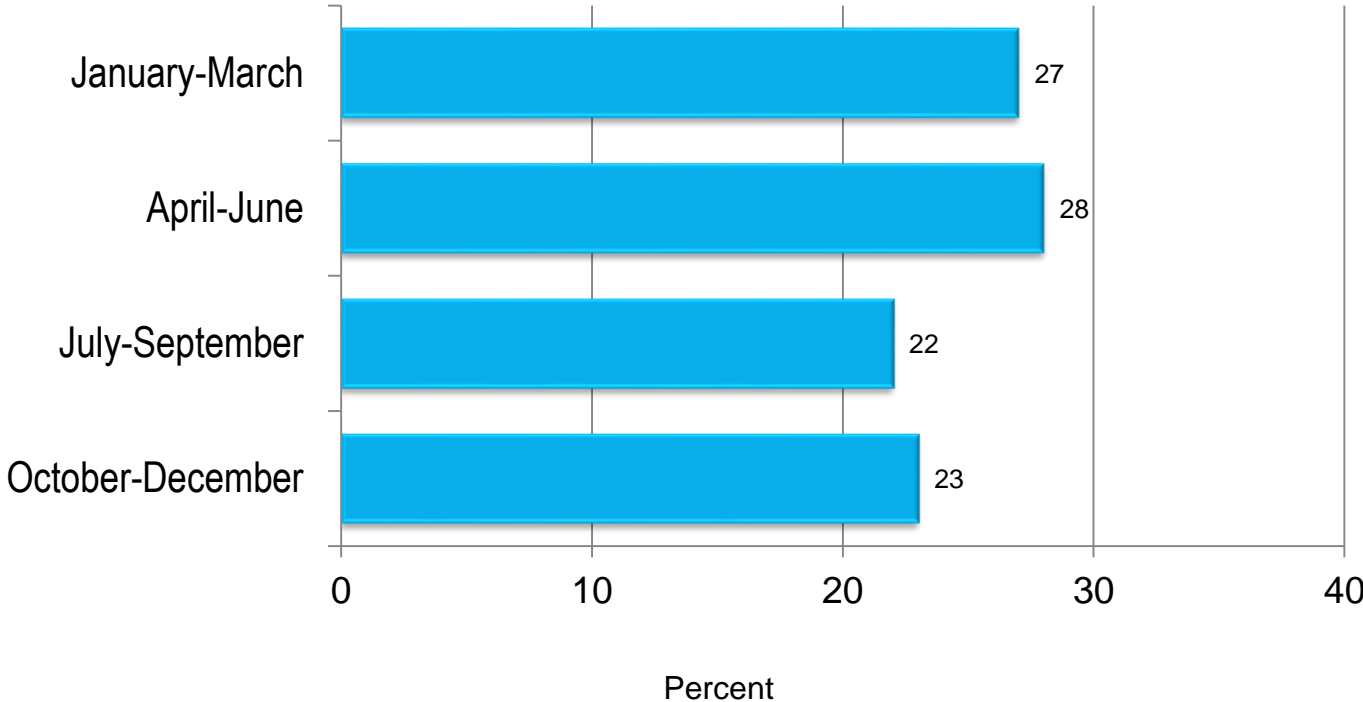
Base: Total Overnight Person-Trips to Jacksonville



Season of Trip



Base: Total Overnight Person-Trips to Jacksonville

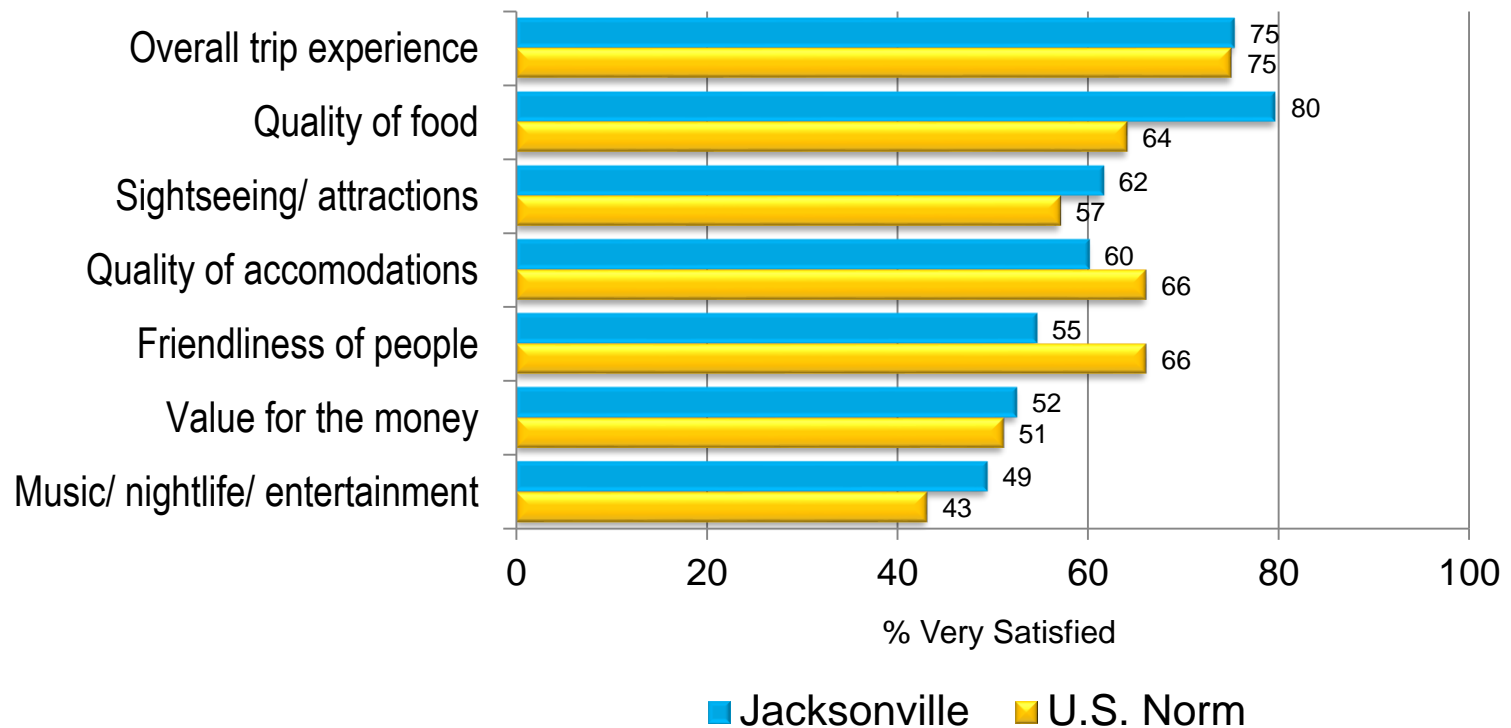


Satisfaction with Jacksonville Trip

% Very Satisfied



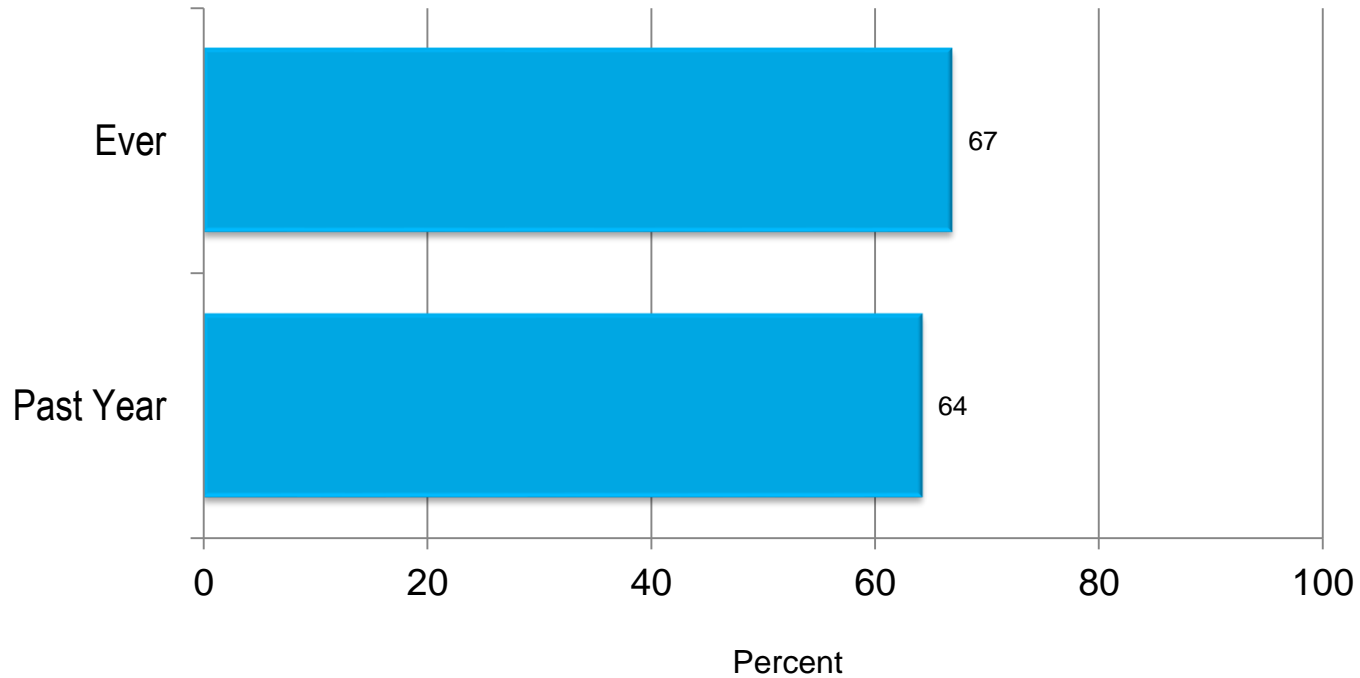
Base: Total Overnight Person-Trips to Jacksonville



Past Visitation to Jacksonville



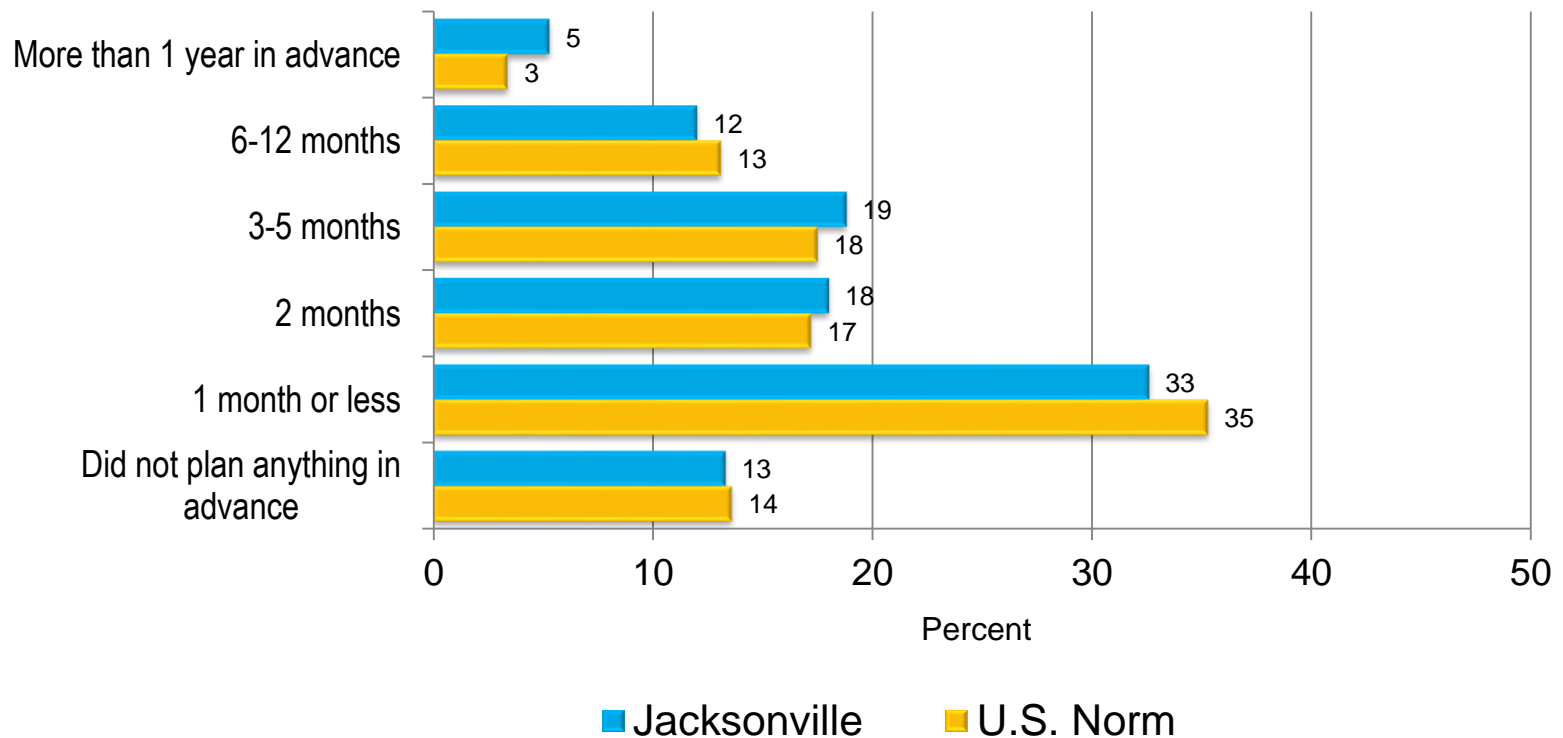
Base: Total Overnight Person-Trips to Jacksonville



Length of Trip Planning



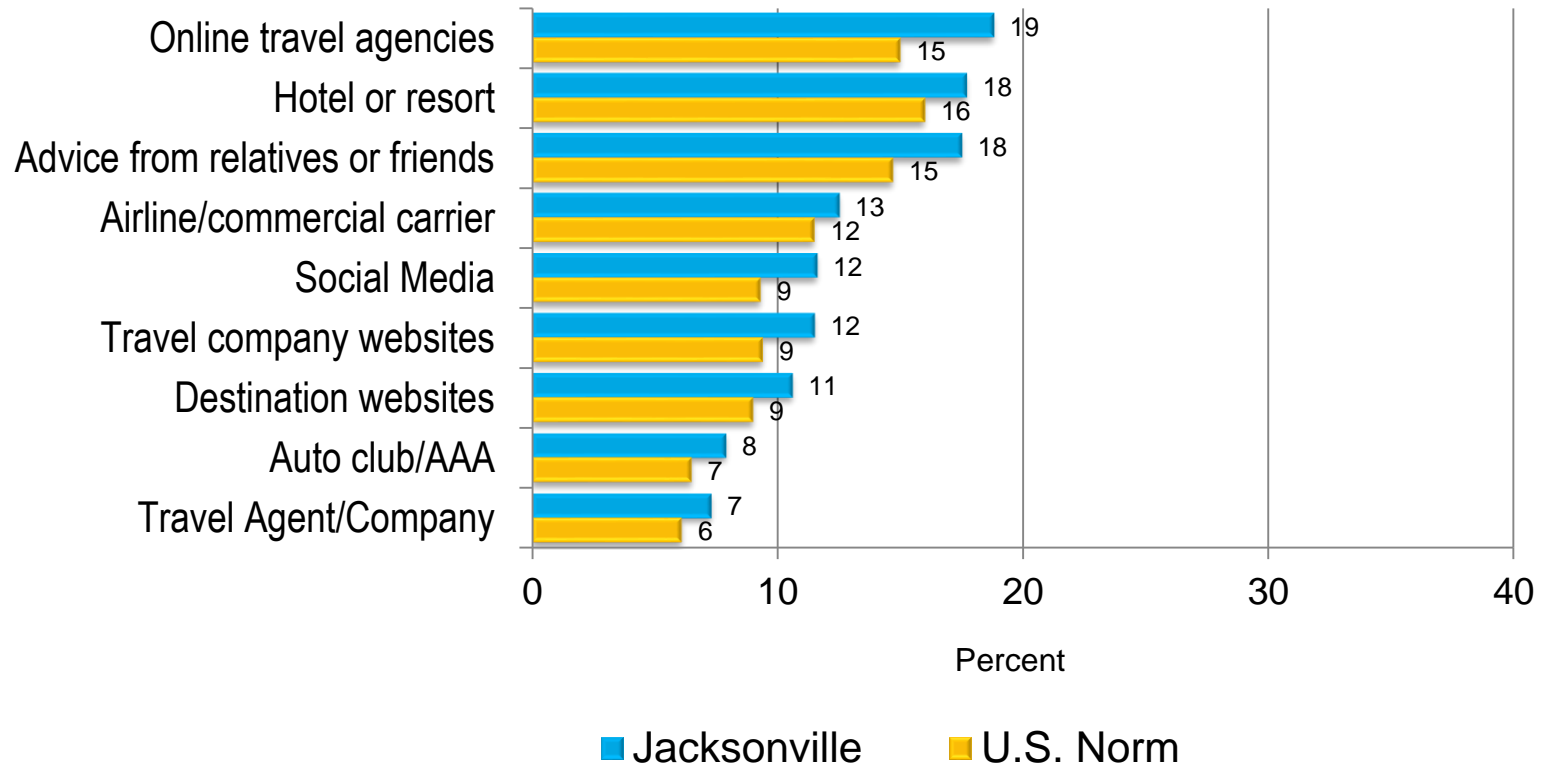
Base: Total Overnight Person-Trips



Trip Planning Information Sources



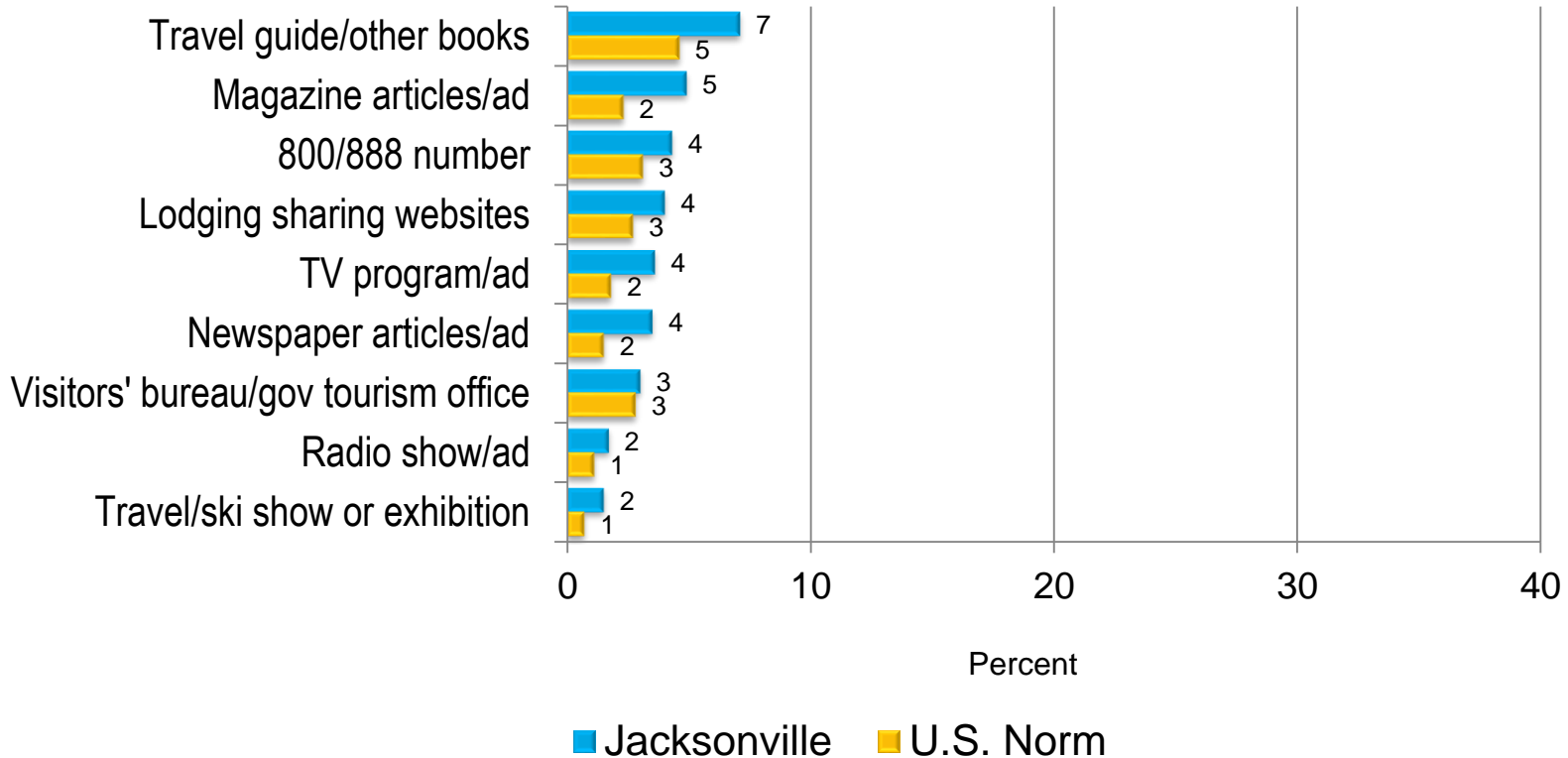
Base: Total Overnight Person-Trips



Trip Planning Information Sources - (Cont'd)



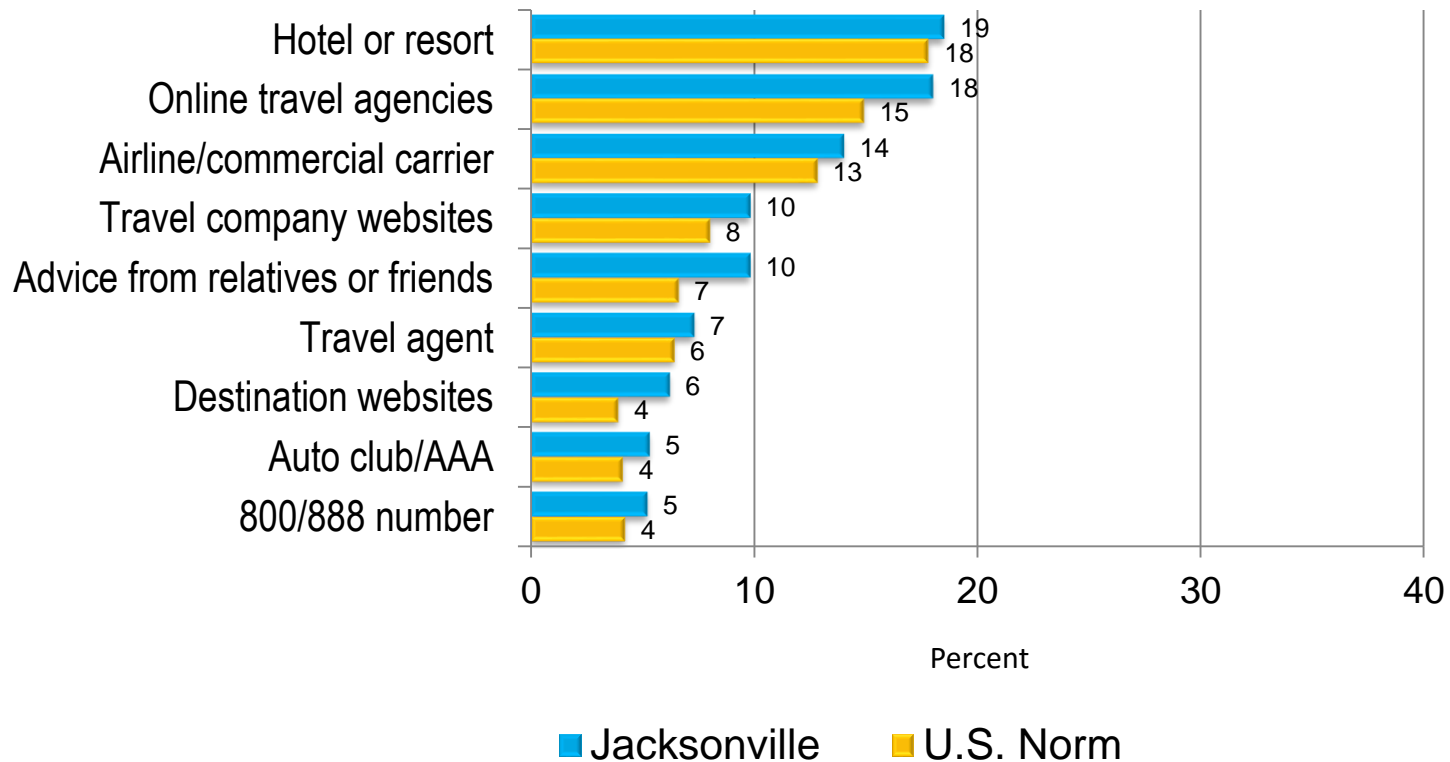
Base: Total Overnight Person-Trips



Method of Booking



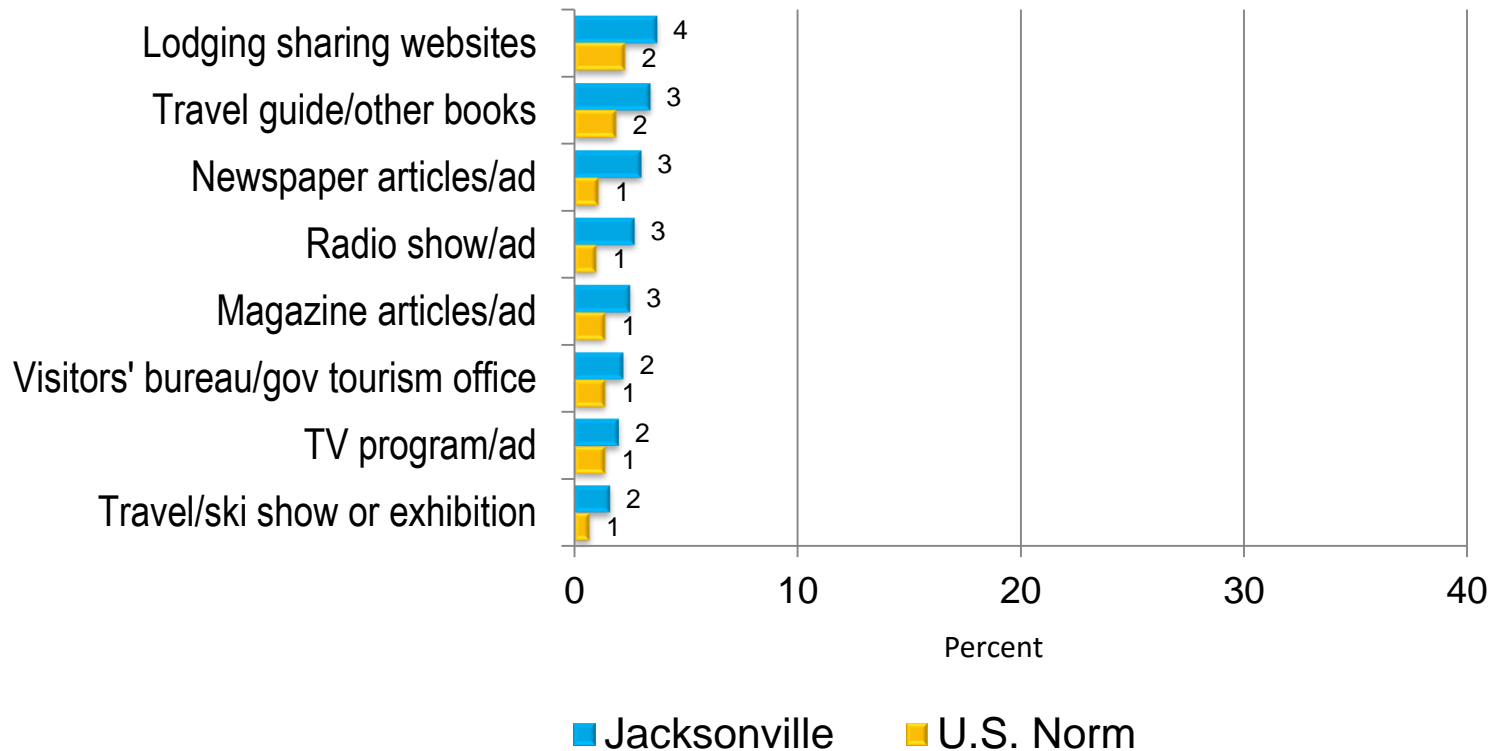
Base: Total Overnight Person-Trips



Method of Booking – (Cont'd)



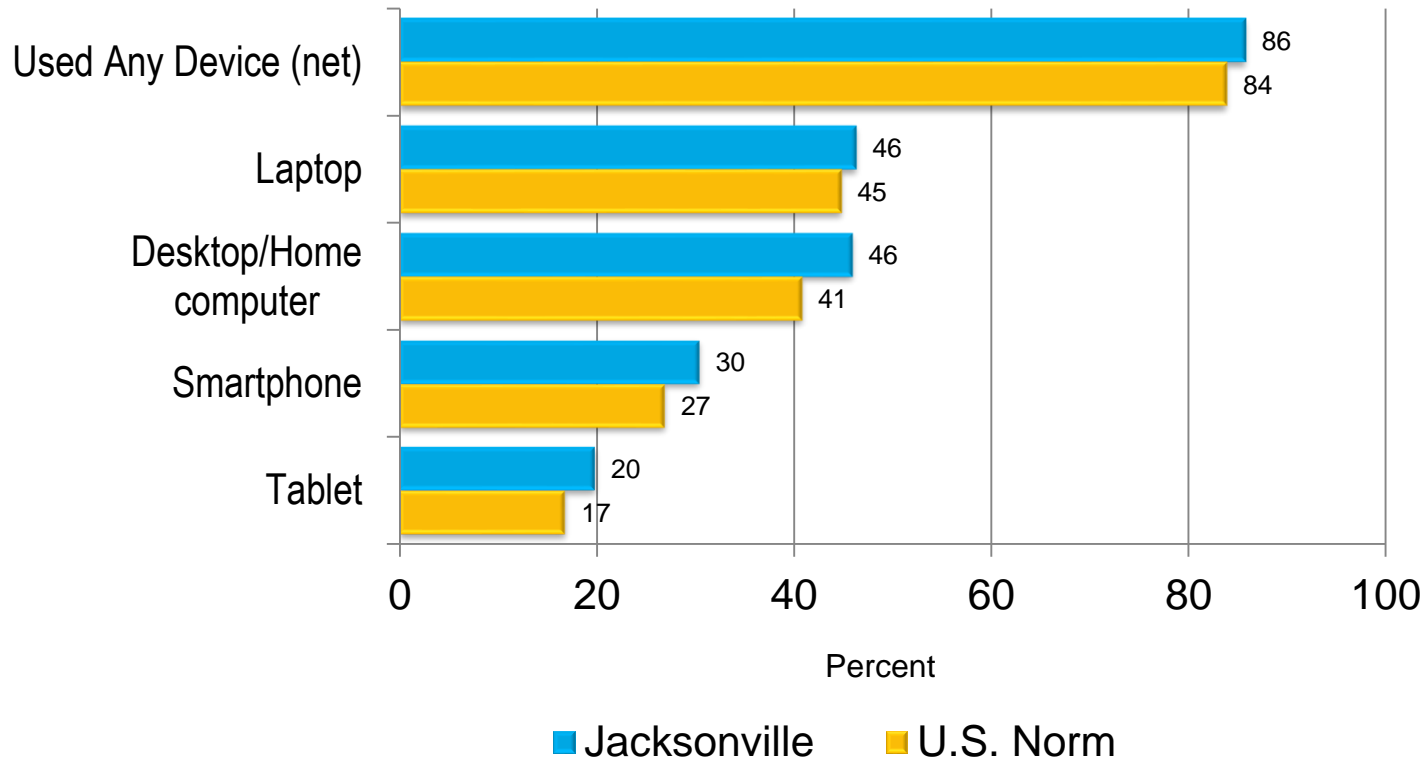
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



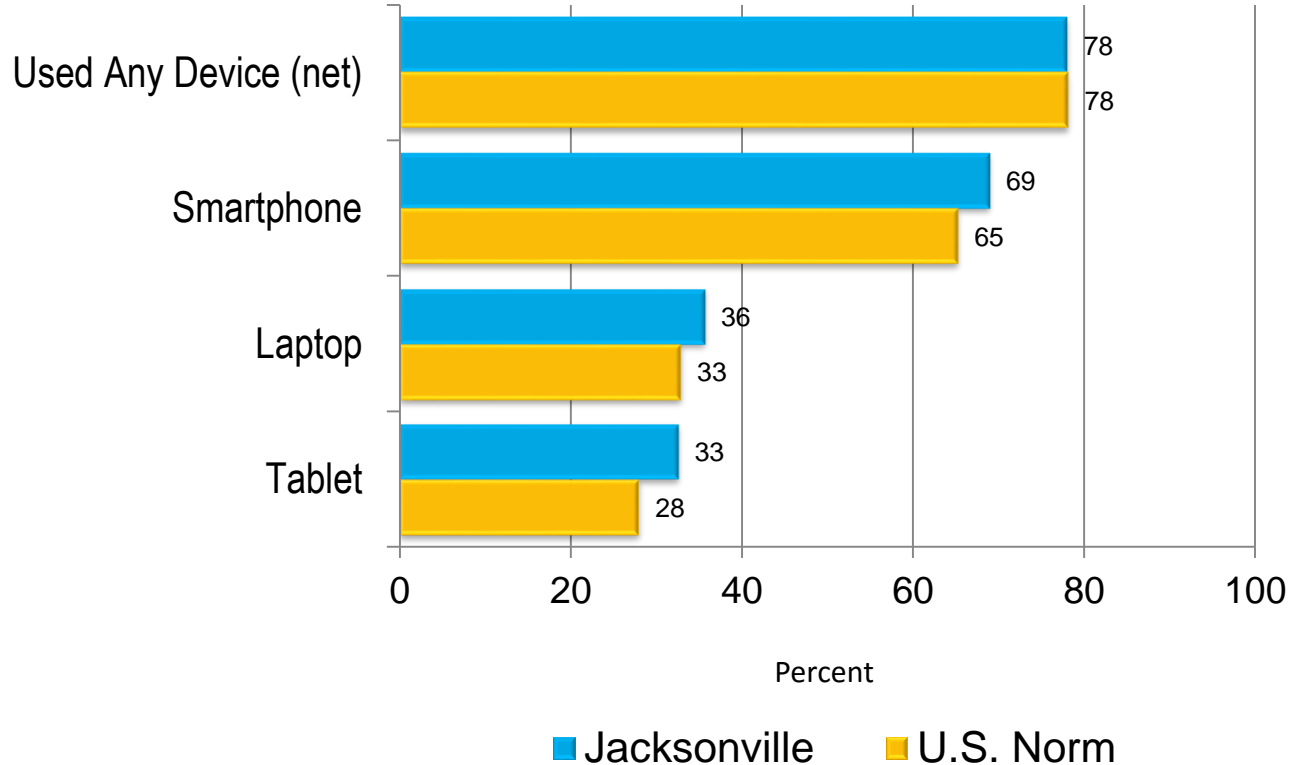
Base: Total Overnight Person-Trips



Devices Used During Trip



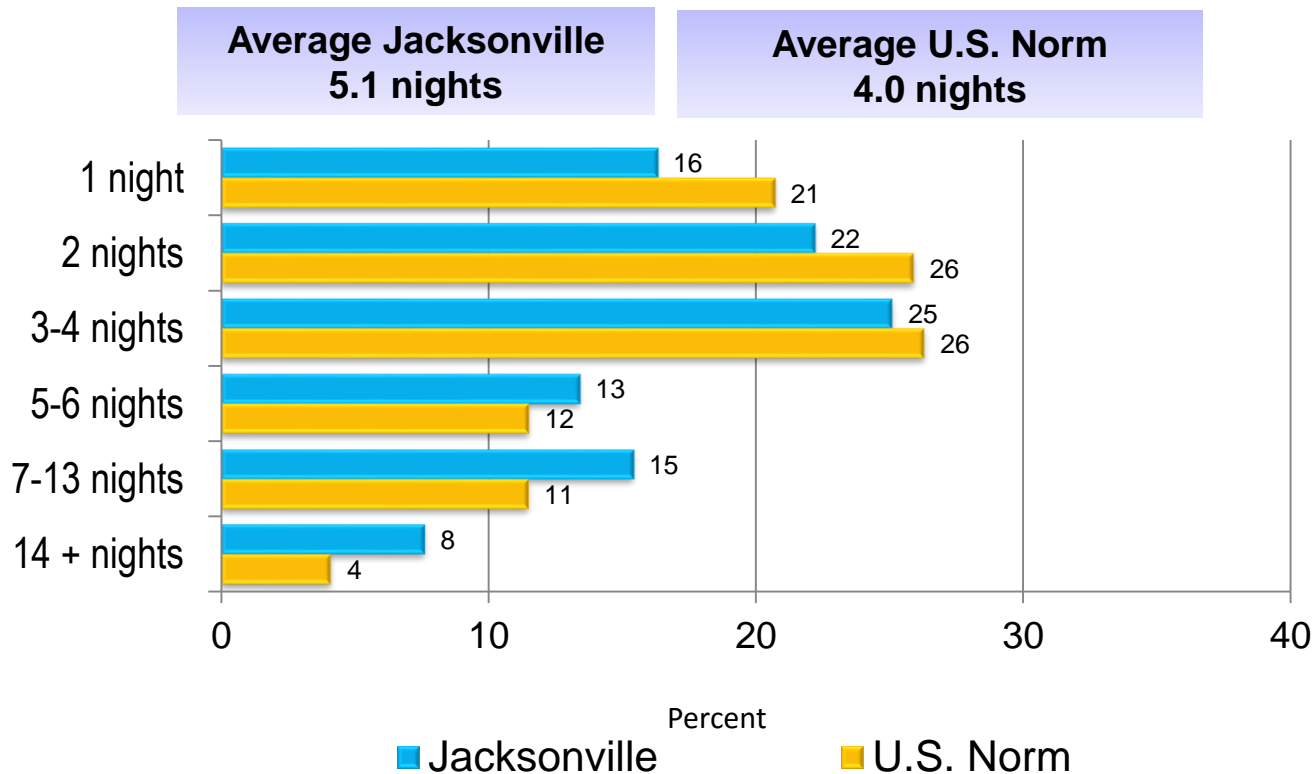
Base: Total Overnight Person-Trips



Total Nights Away on Trip



Base: Total Overnight Person-Trips

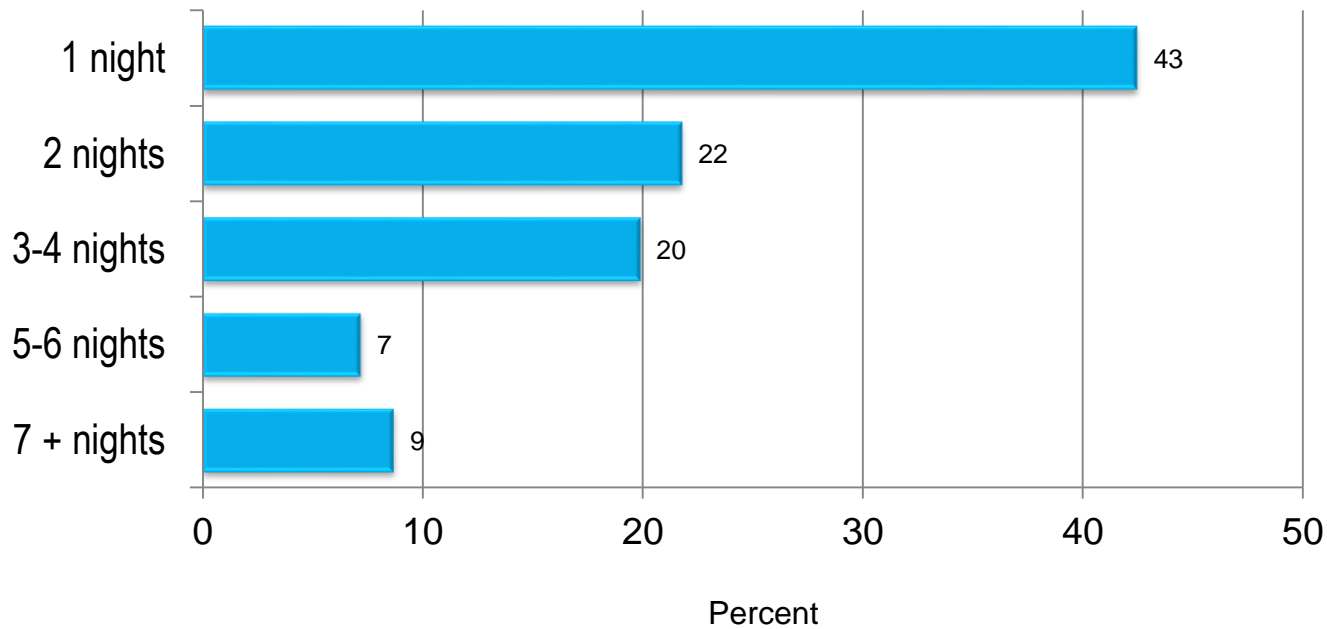


Number of Nights Spent in Jacksonville



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

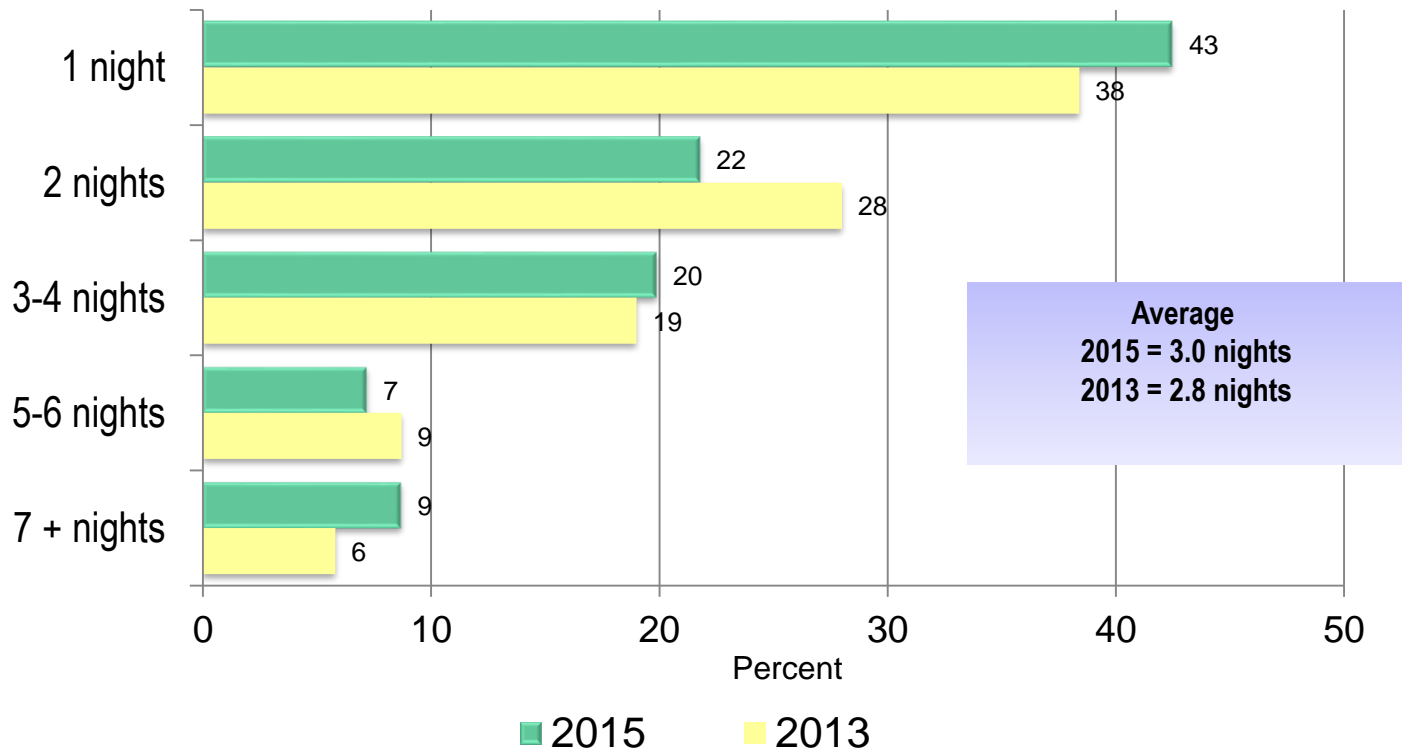
Average Nights Spent in Jacksonville = 3.0



Number of Nights Spent in Jacksonville 2015 vs. 2013



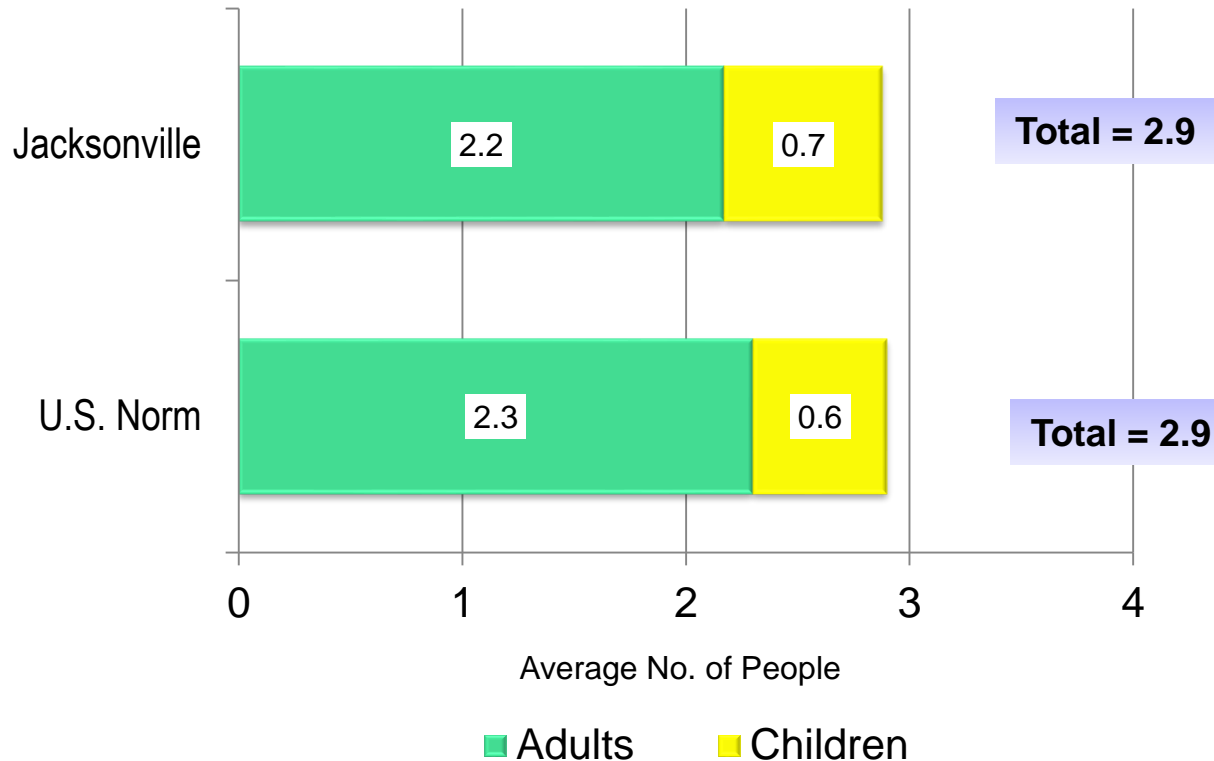
Base: Overnight Person-Trips with 1+ Nights Spent In Jacksonville



Size of Travel Party



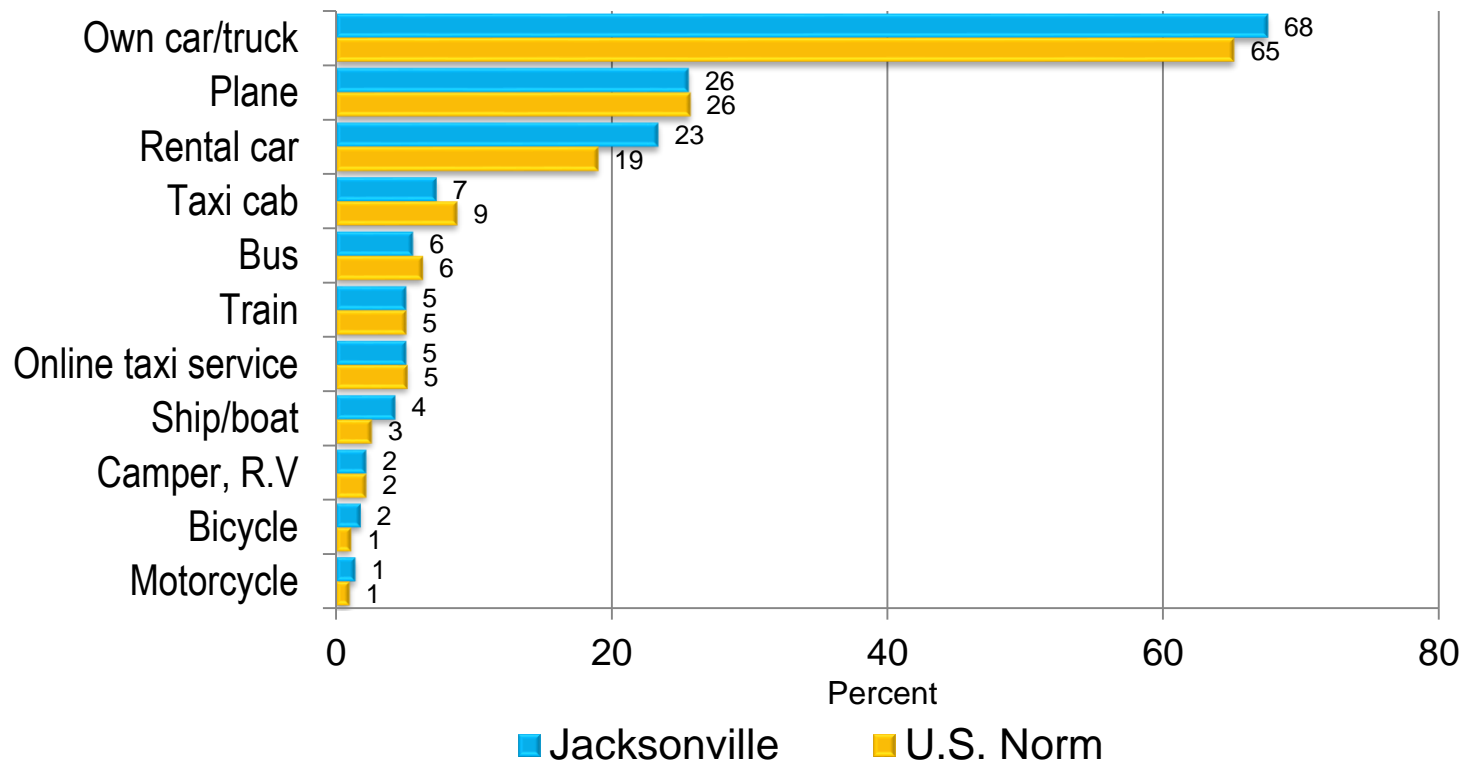
Base: Total Overnight Person-Trips



Transportation



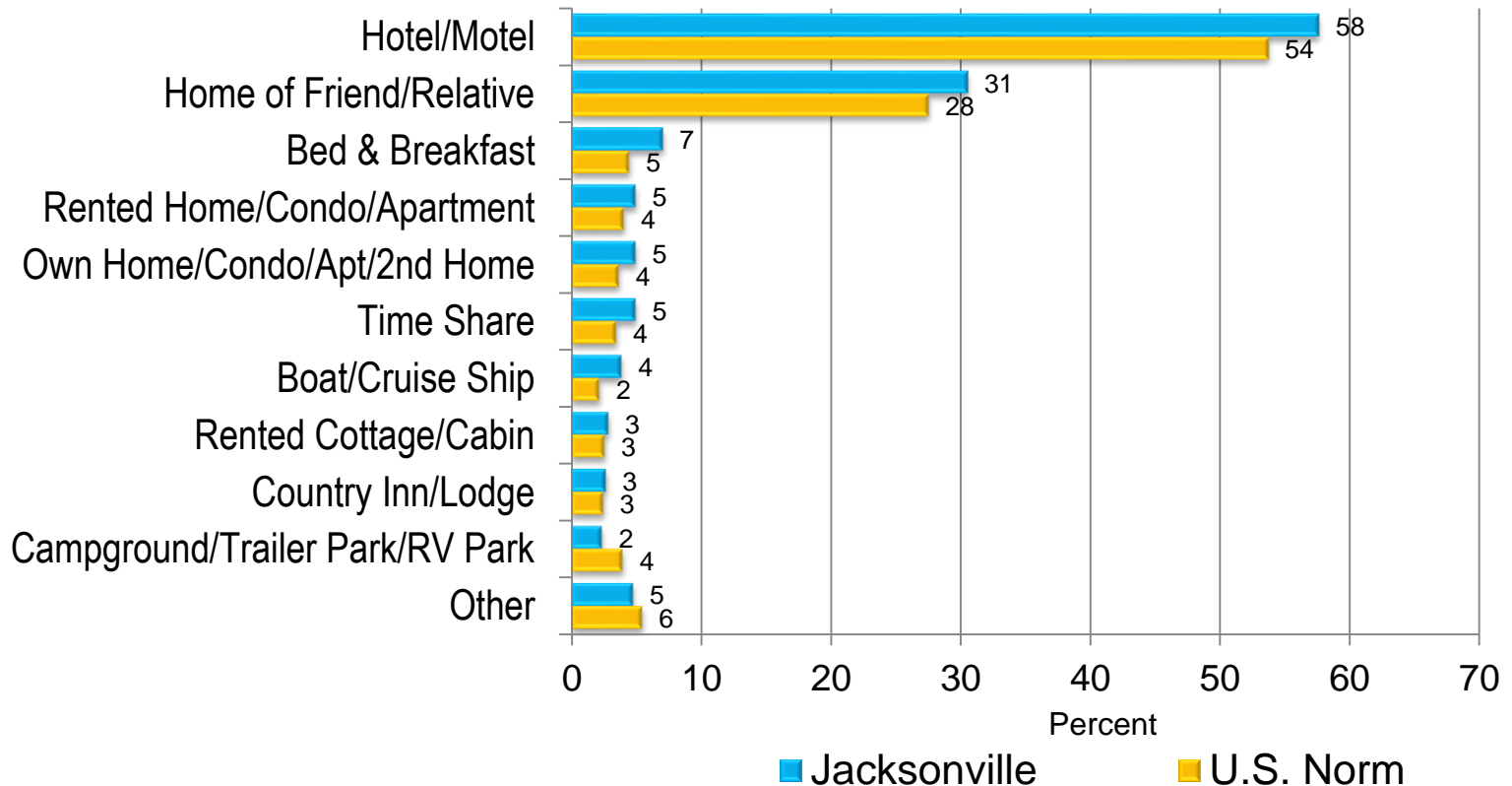
Base: Total Overnight Person-Trips



Accommodations



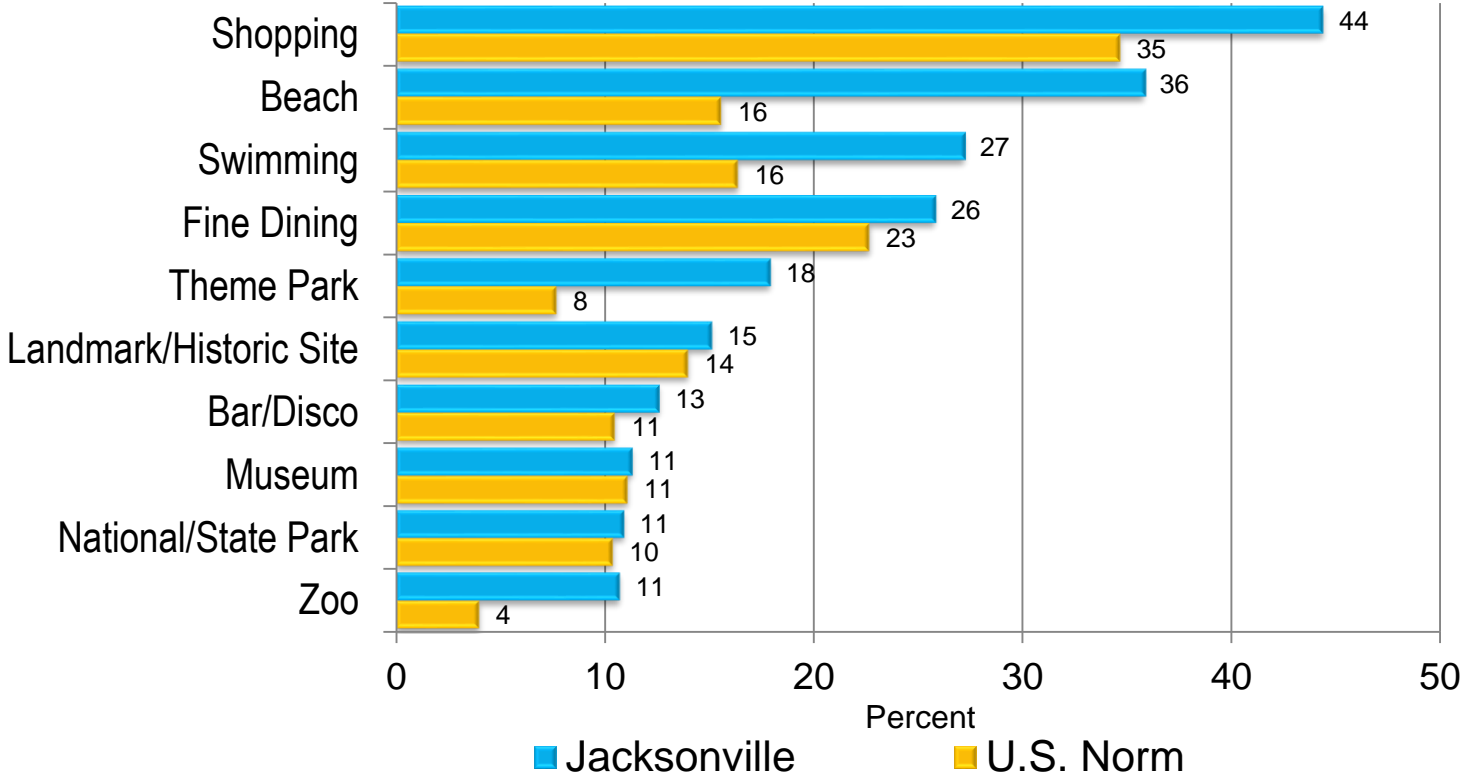
Base: Total Overnight Person-Trips



Activities and Experiences



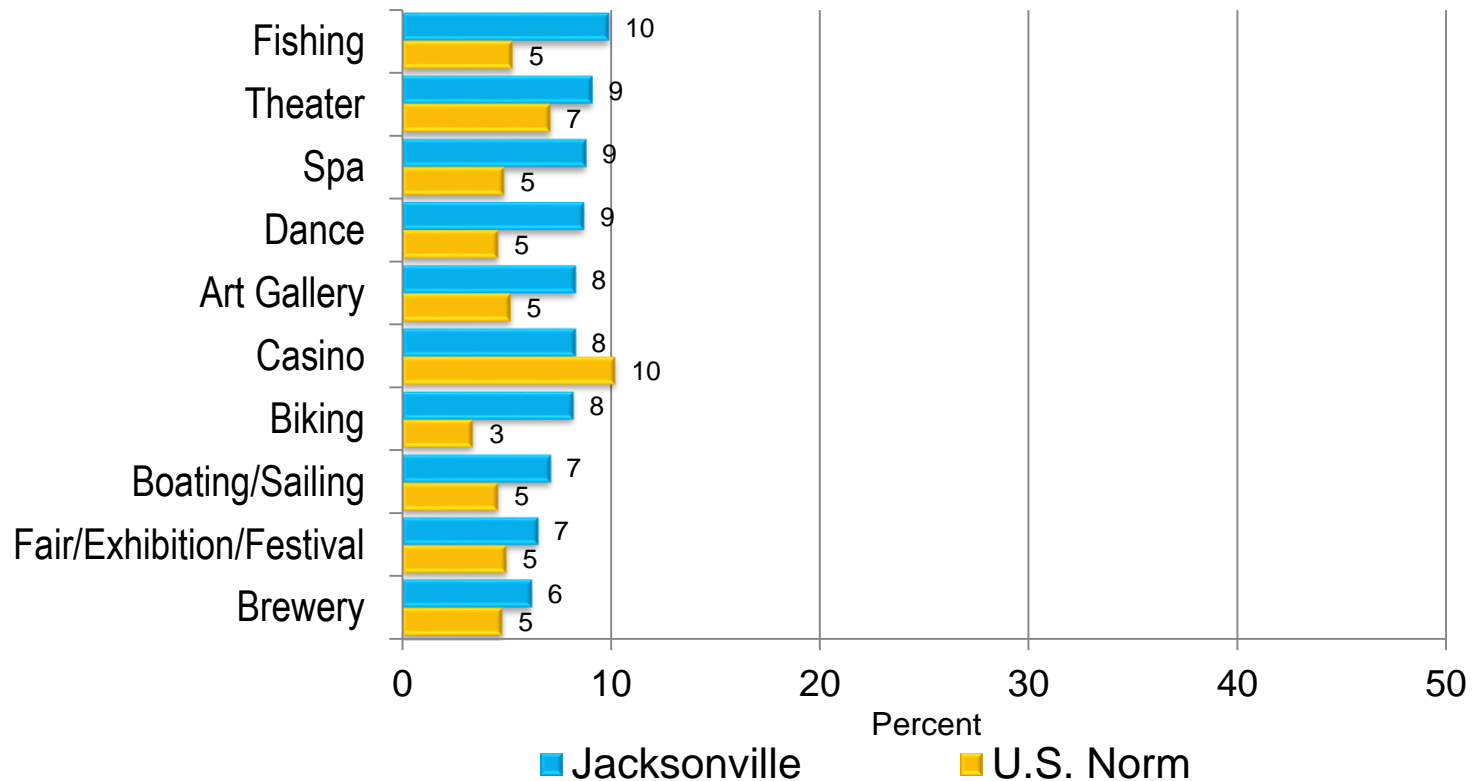
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



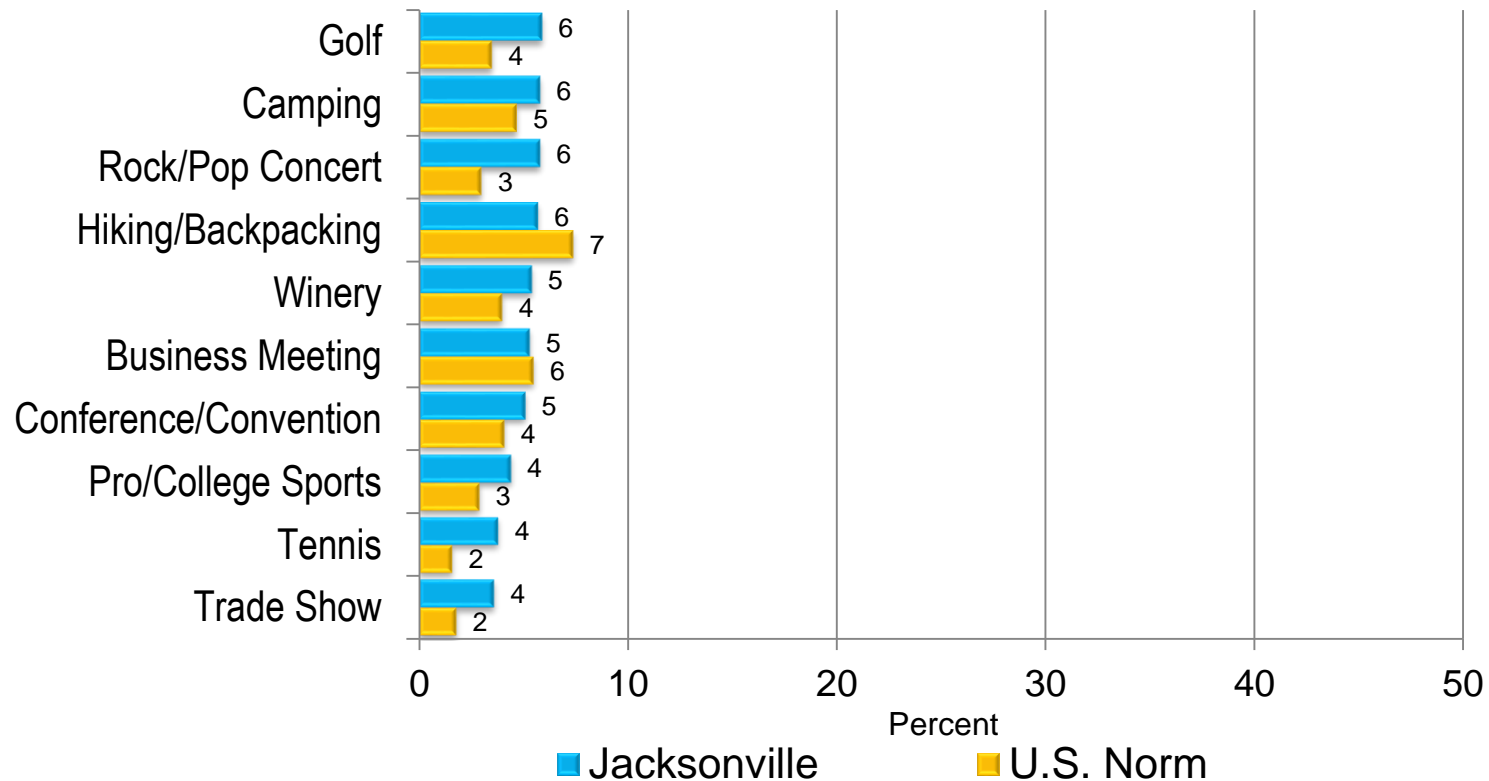
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



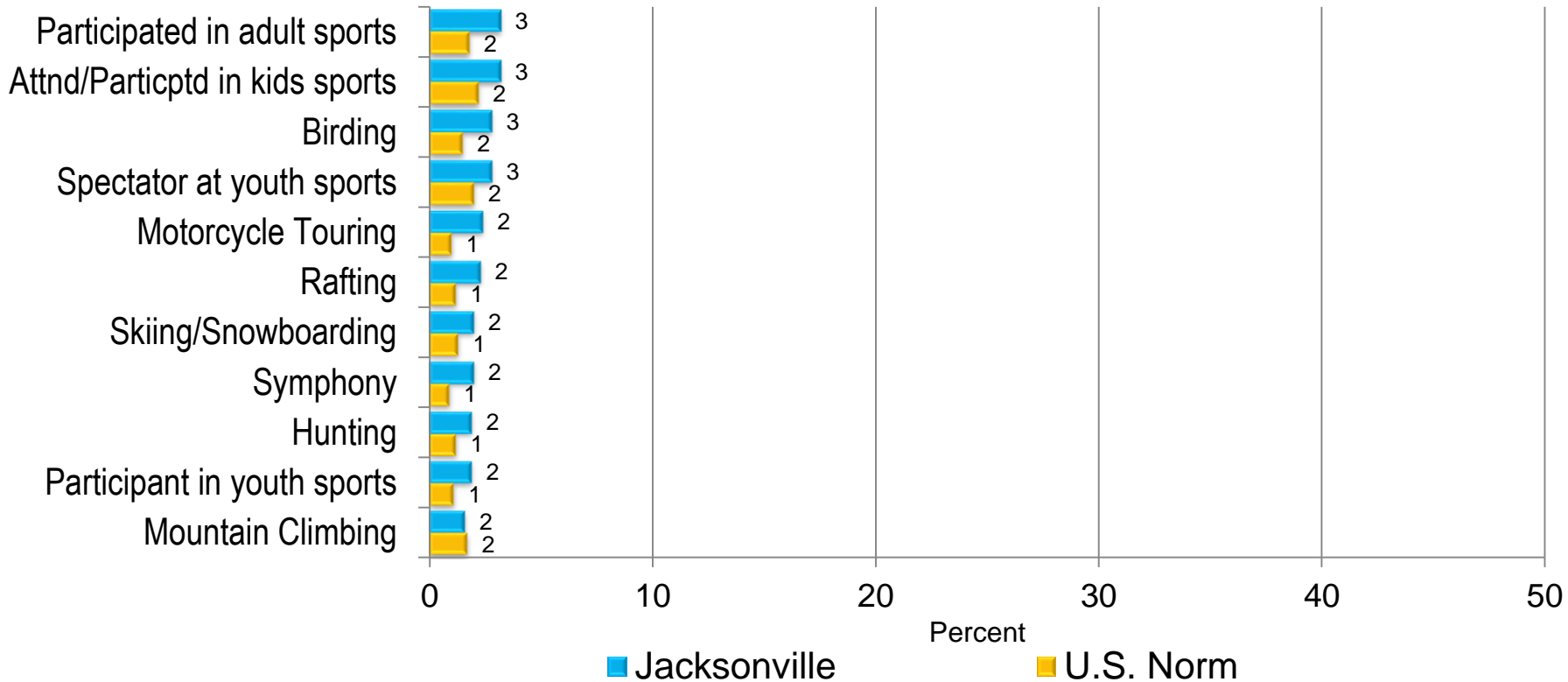
Base: Total Overnight Person-Trips



Activities and Experiences – (Cont'd)



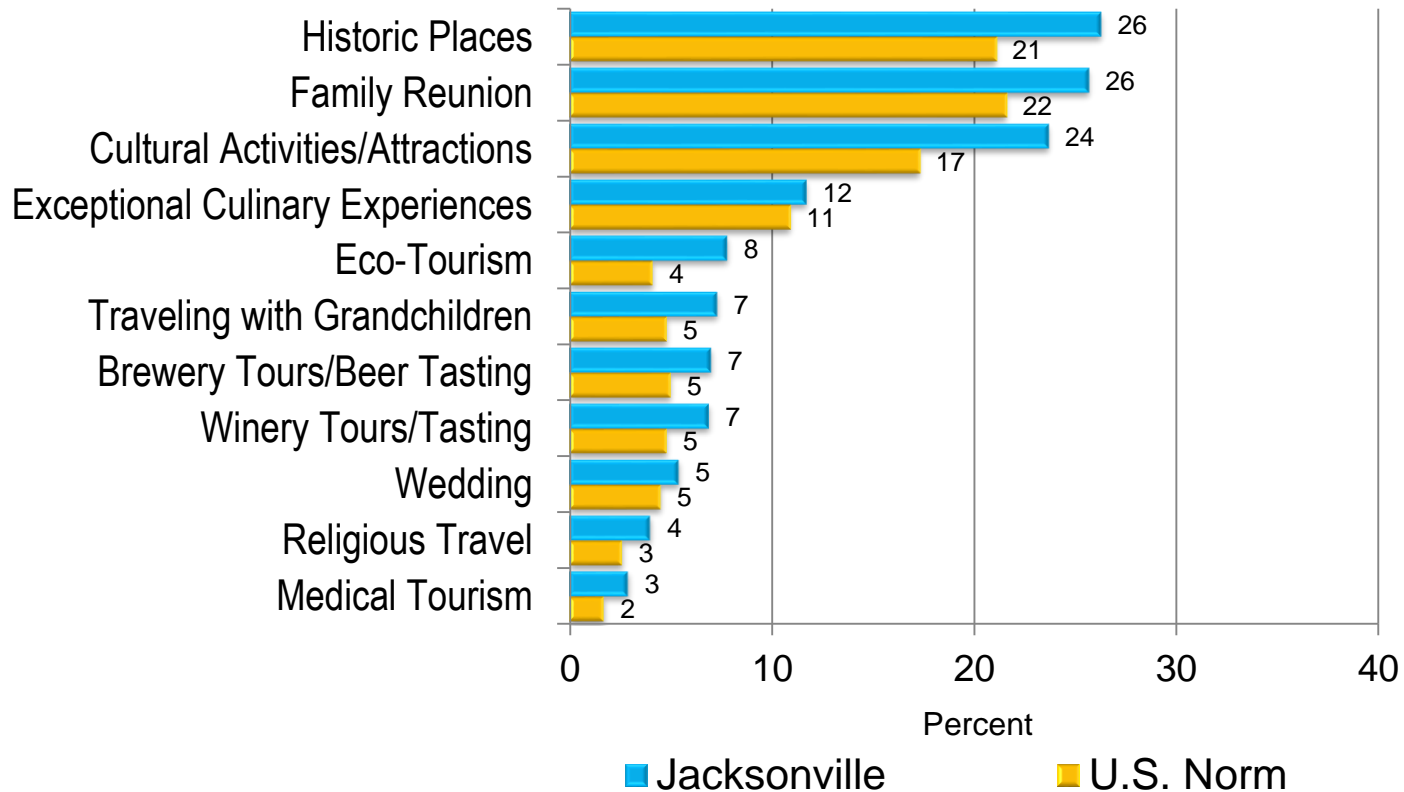
Base: Total Overnight Person-Trips



Activities of Special Interest



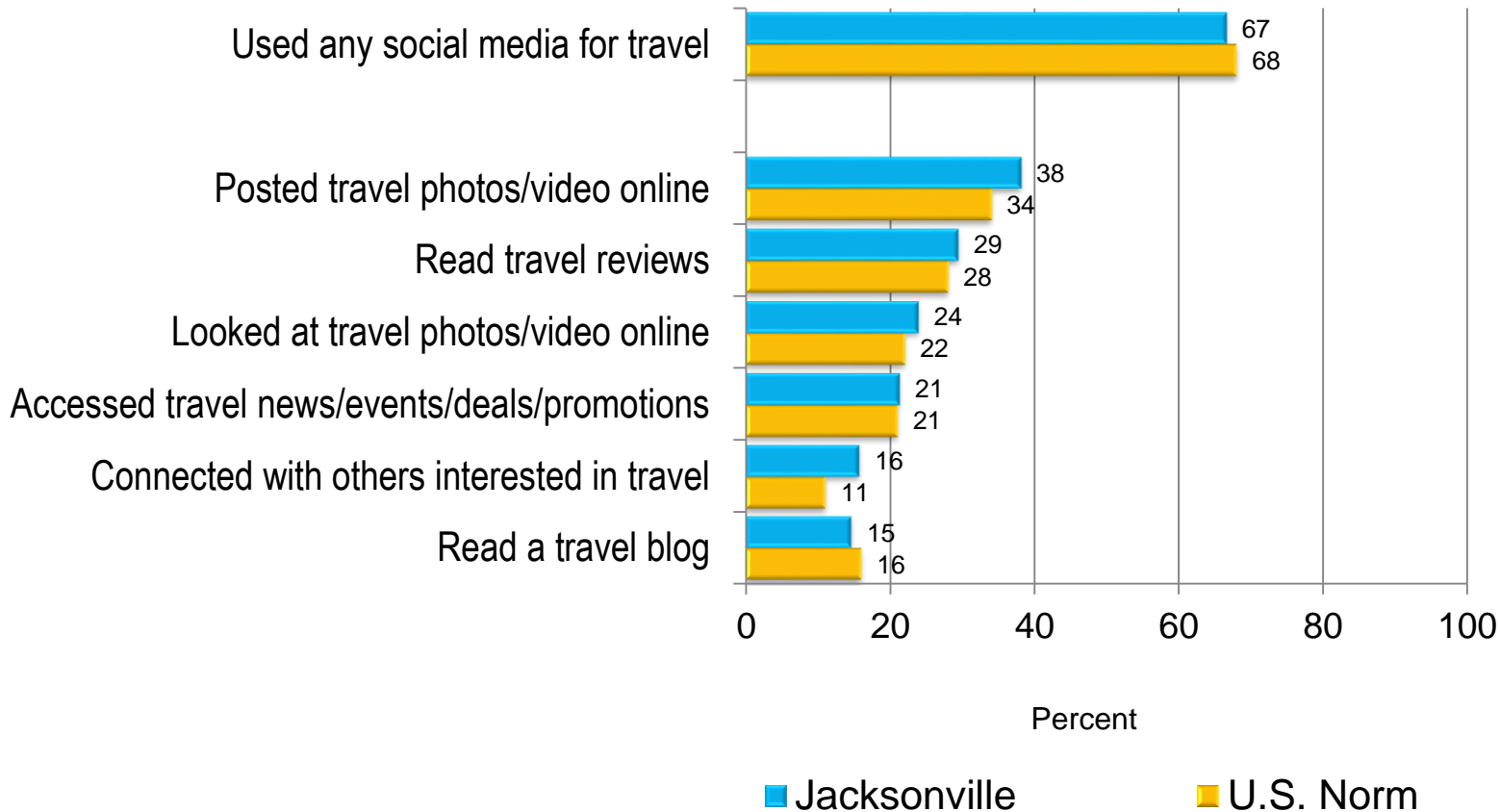
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



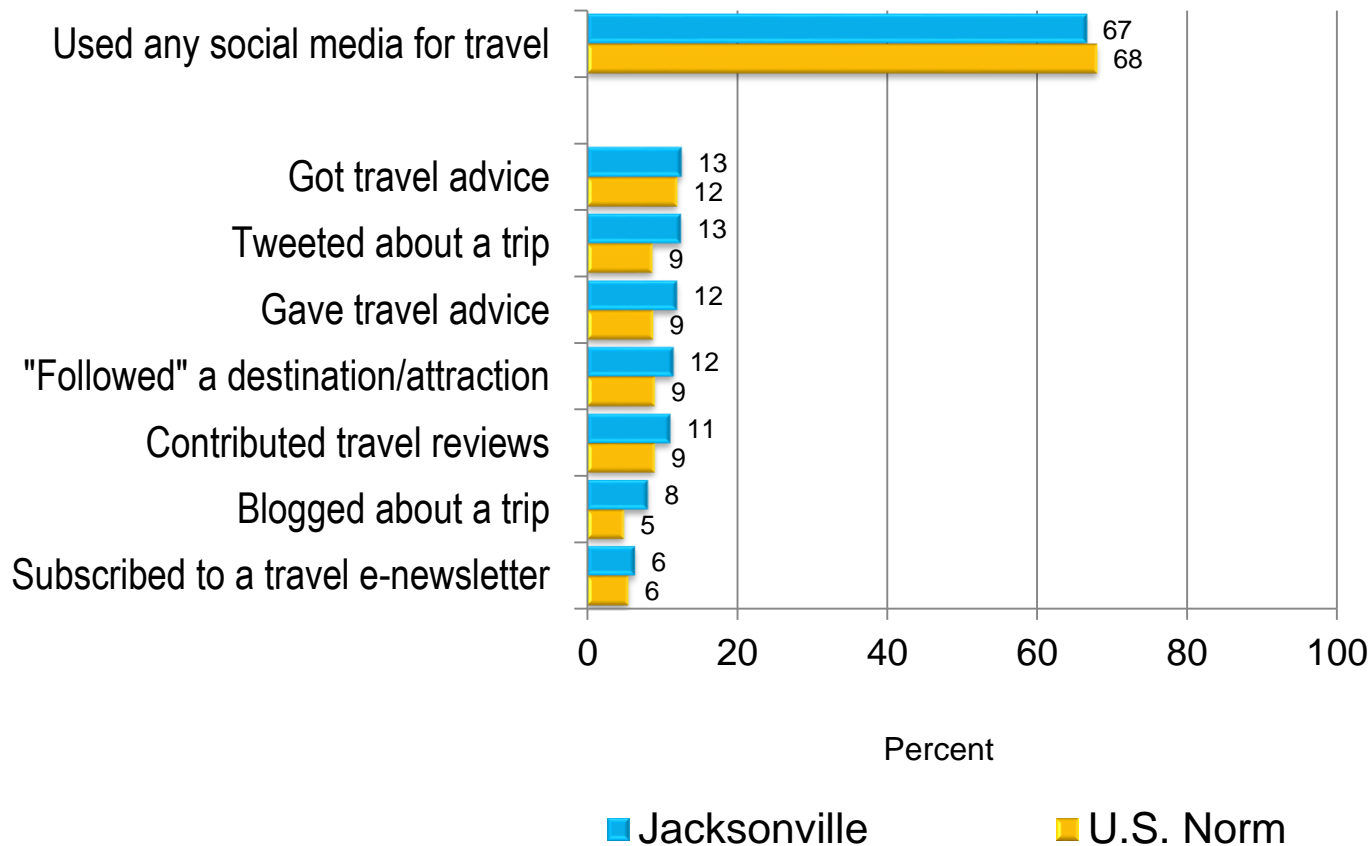
Base: Total Overnight Person-Trips



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



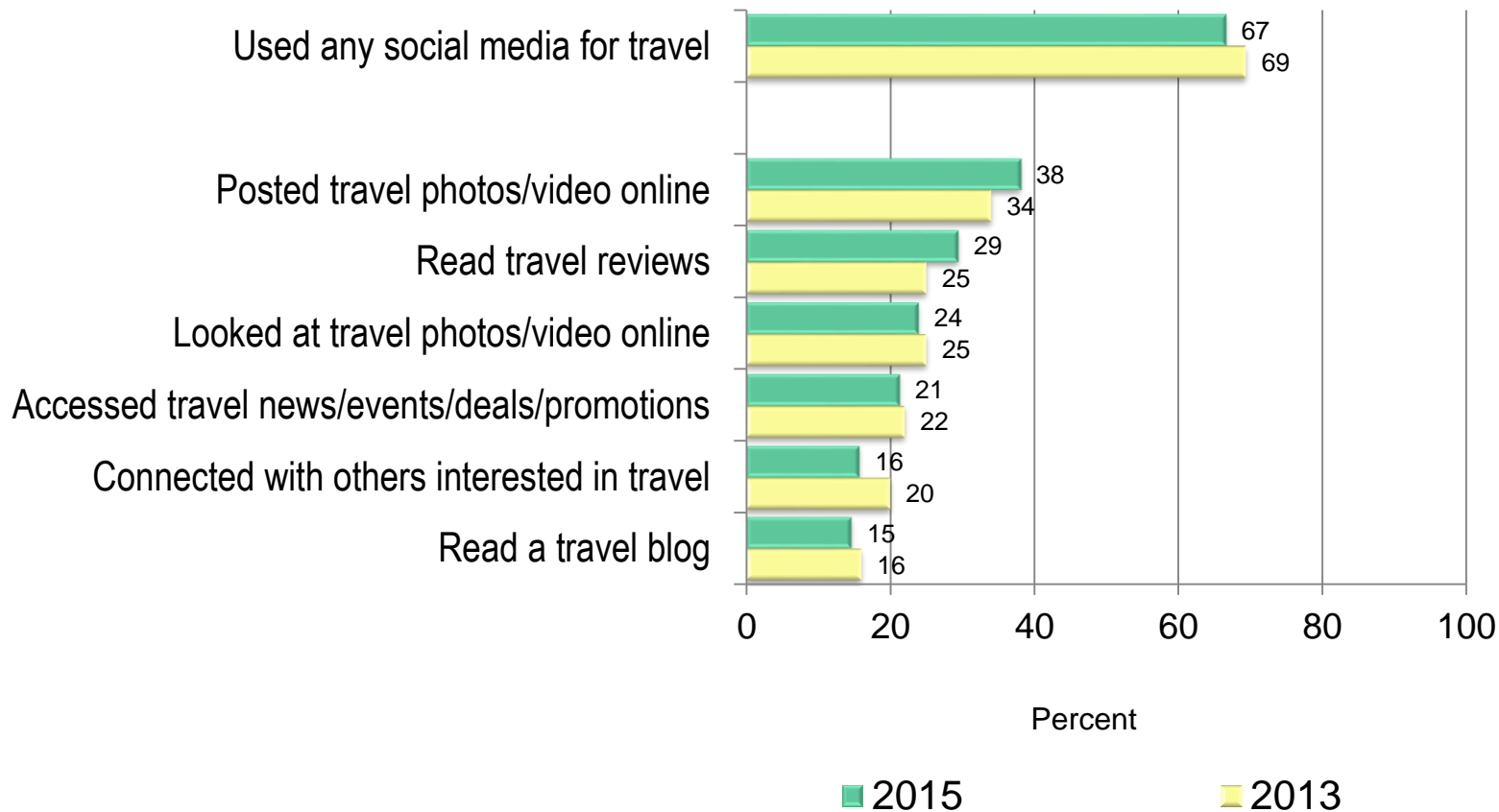
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers in Jacksonville – 2015 vs. 2013



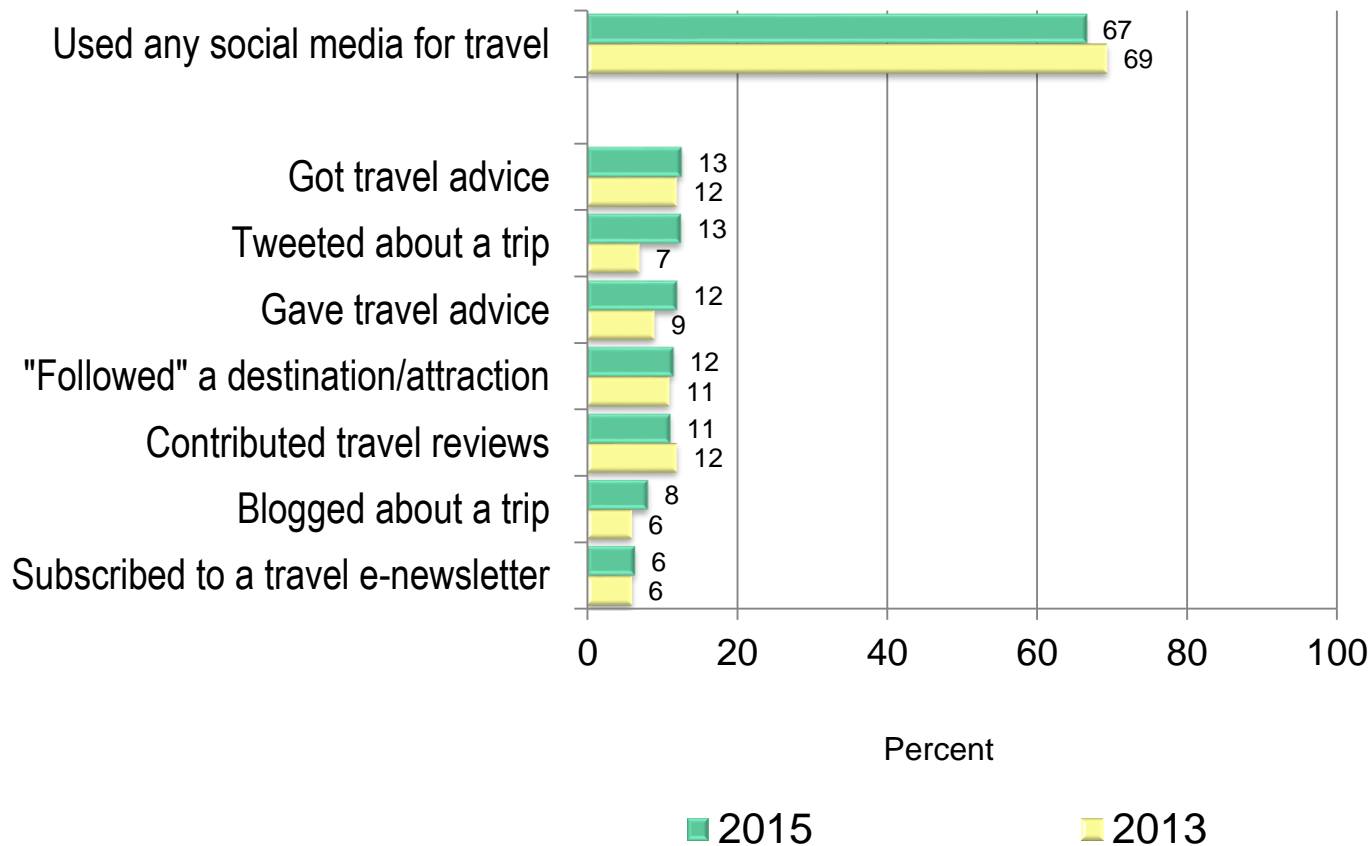
Base: Total Overnight Person-Trips to Jacksonville



Online Social Media Use by Travelers in Jacksonville – 2015 vs. 2013 – (Cont'd)



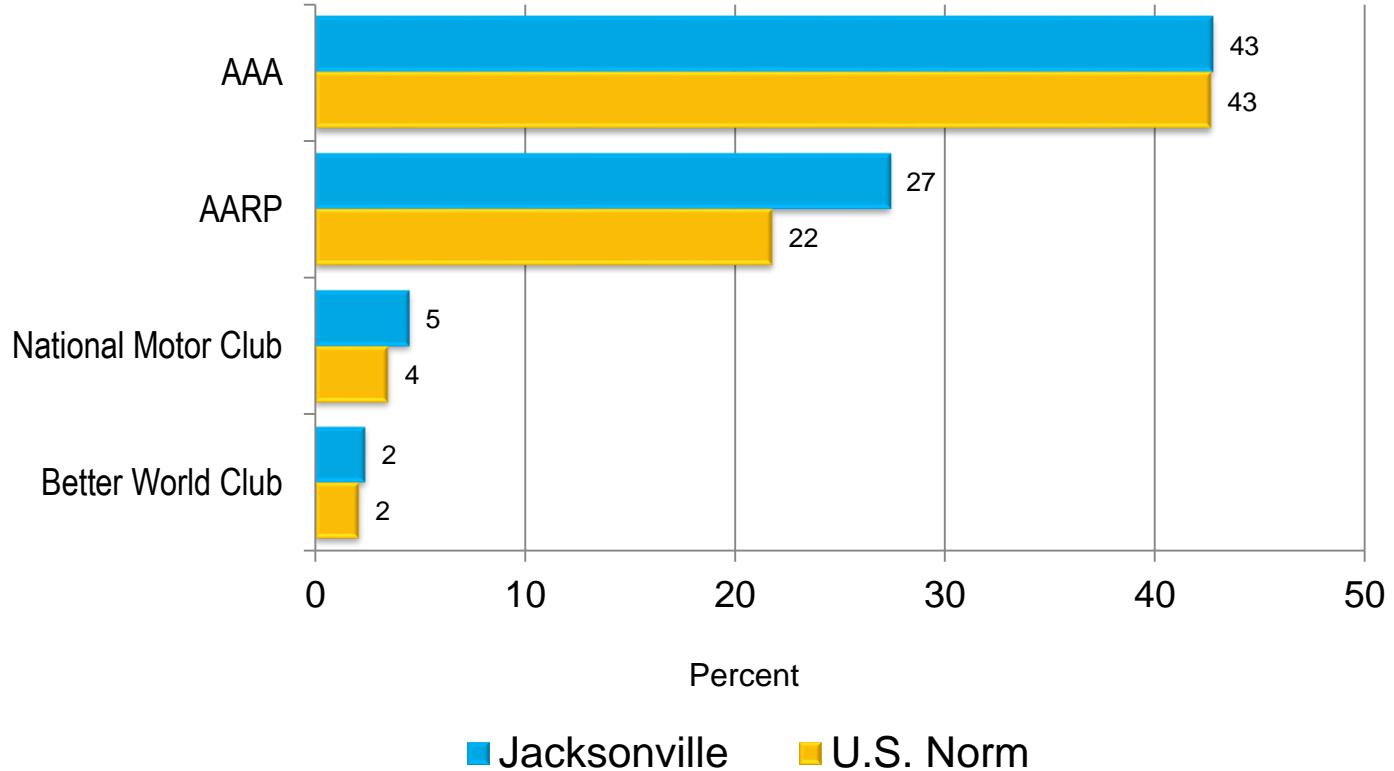
Base: Total Overnight Person-Trips to Jacksonville



Organization Membership



Base: Total Overnight Person-Trips



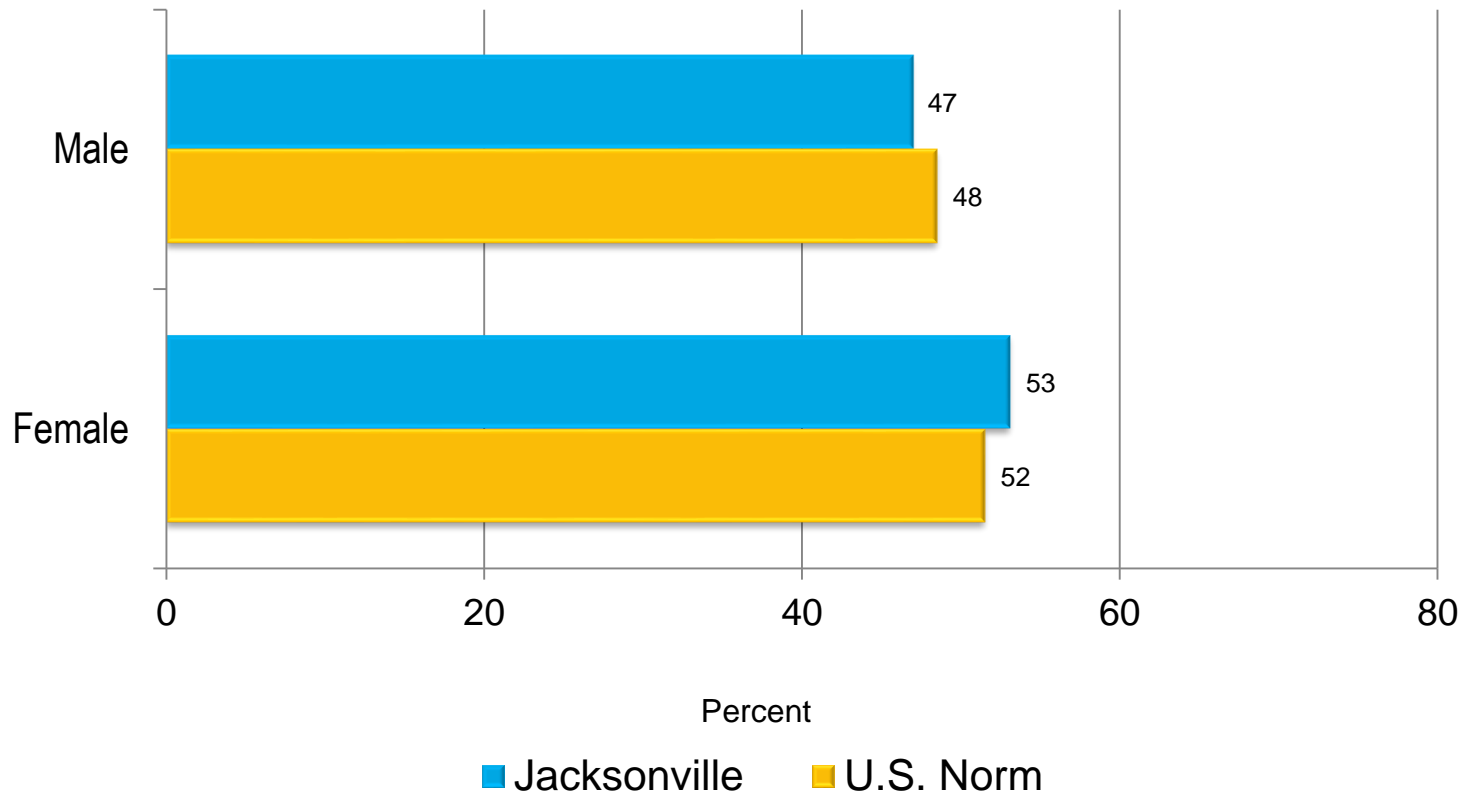


Demographic Profile of Overnight Visitors

Gender



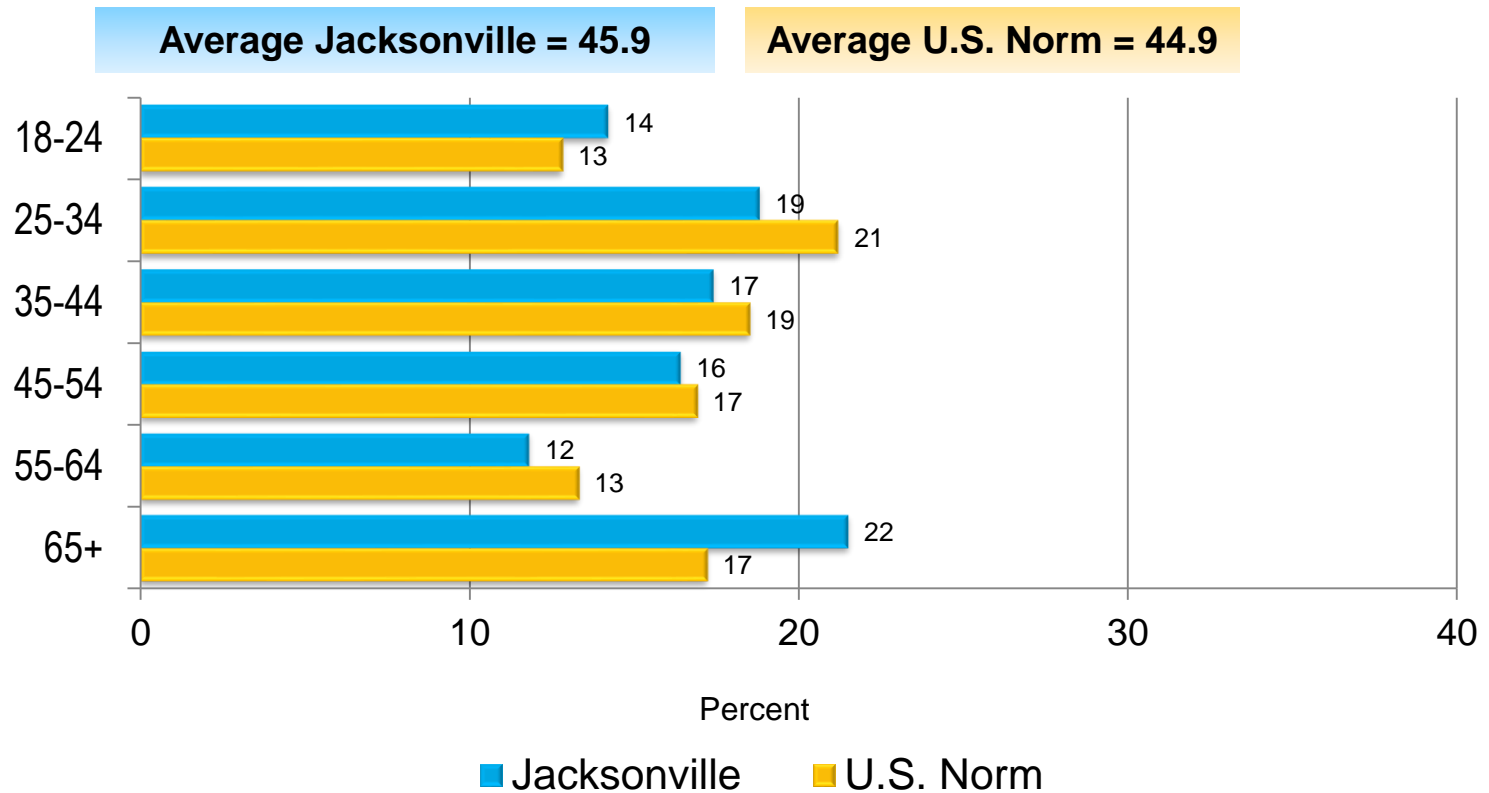
Base: Total Overnight Person-Trips



Age



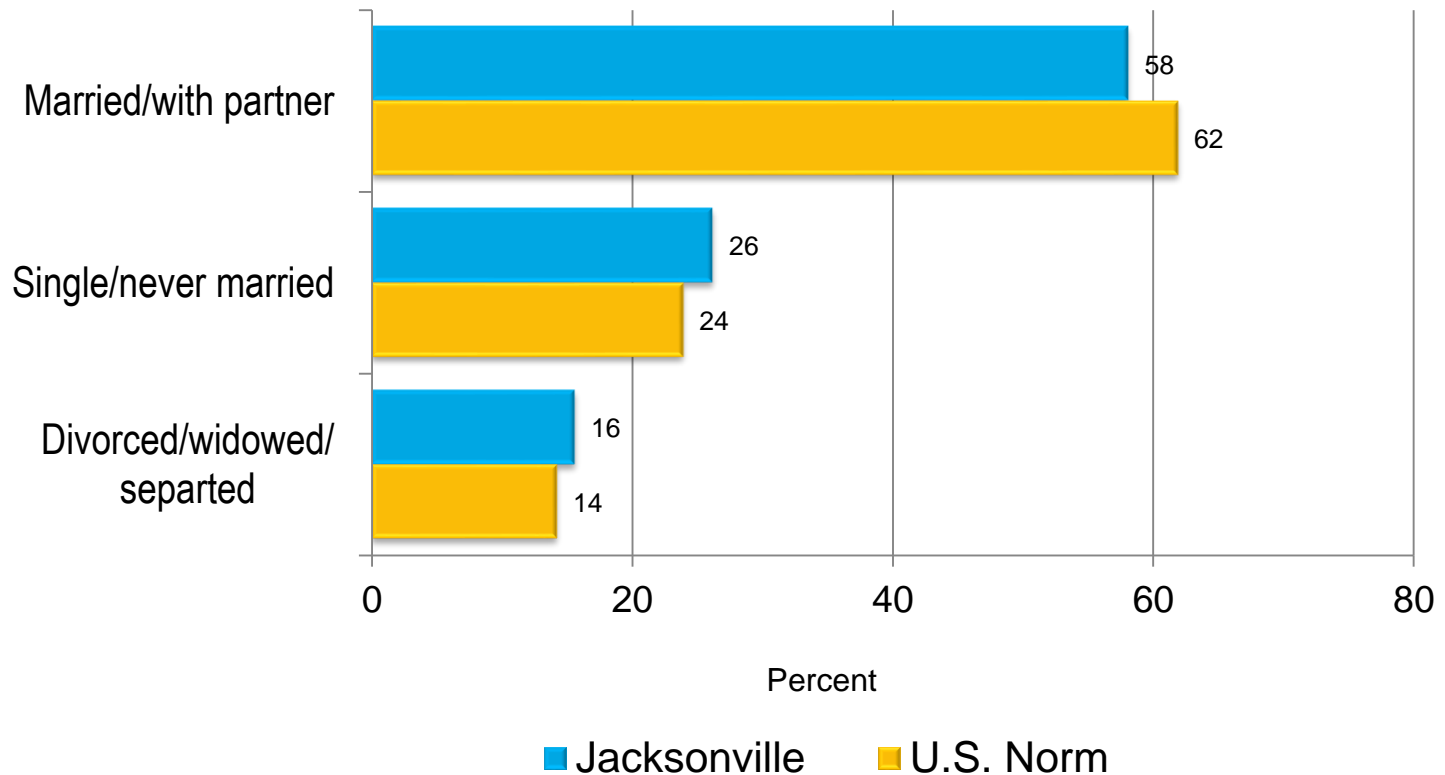
Base: Total Overnight Person-Trips



Marital Status



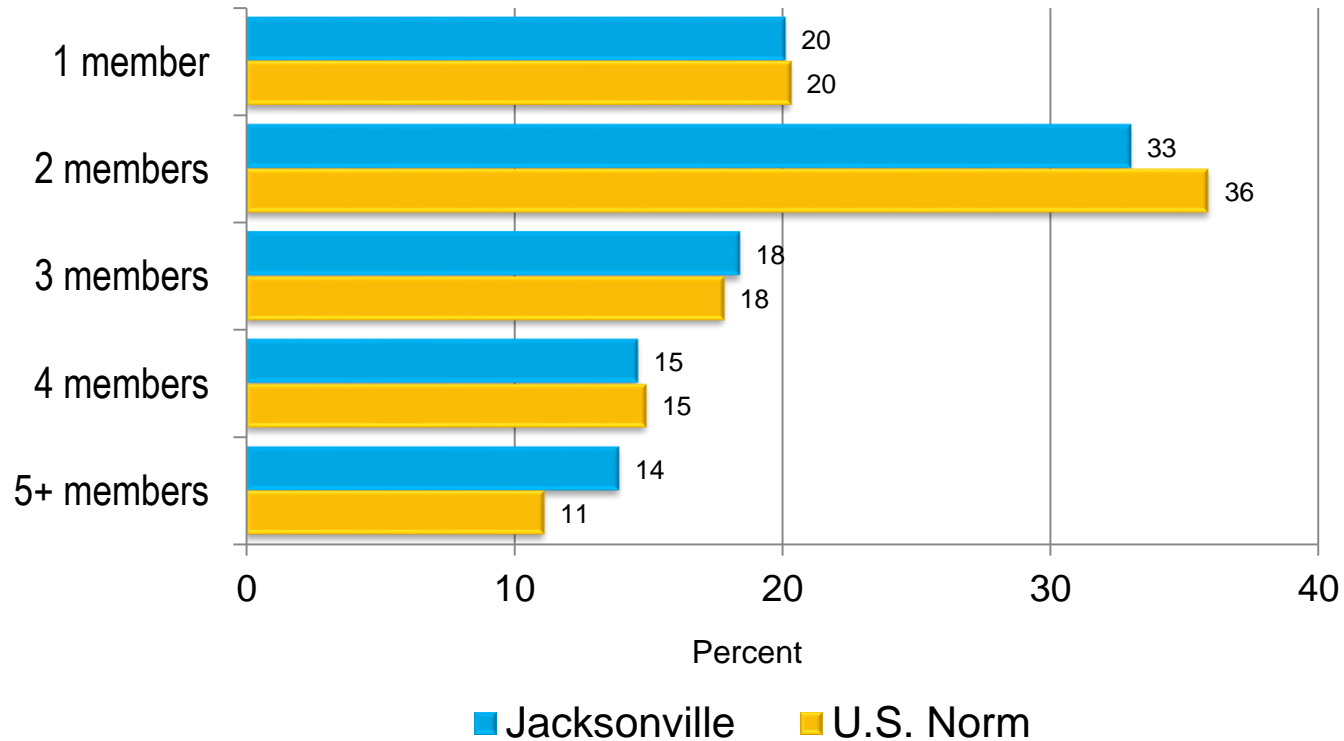
Base: Total Overnight Person-Trips



Household Size



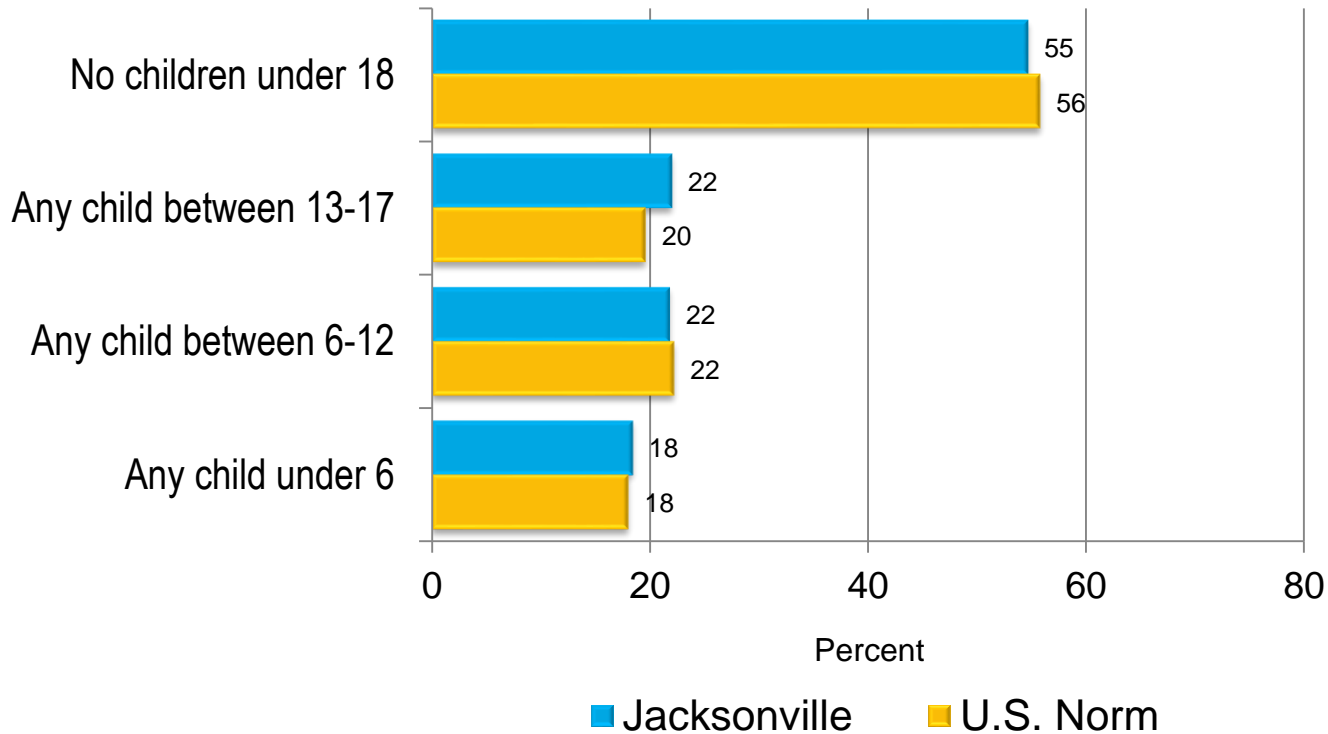
Base: Total Overnight Person-Trips



Children in Household



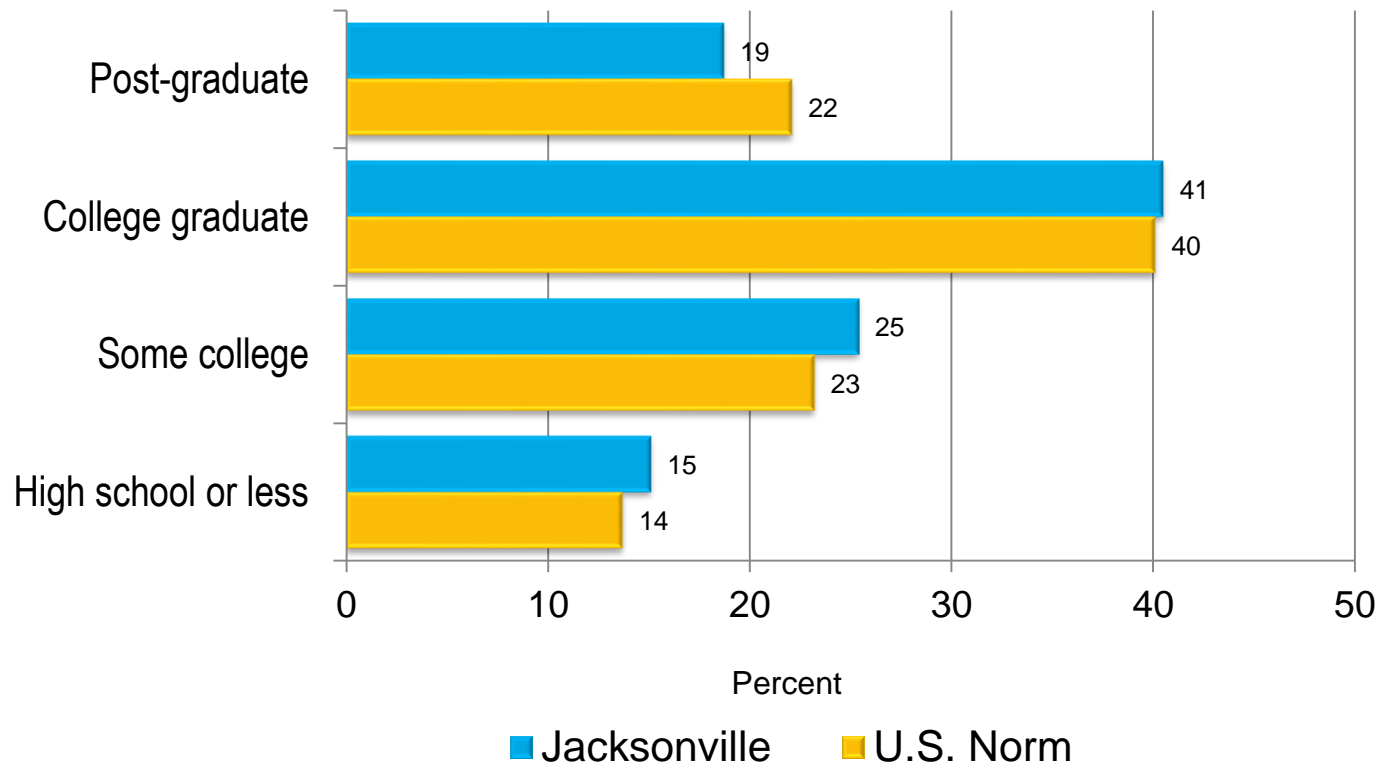
Base: Total Overnight Person Trips



Education



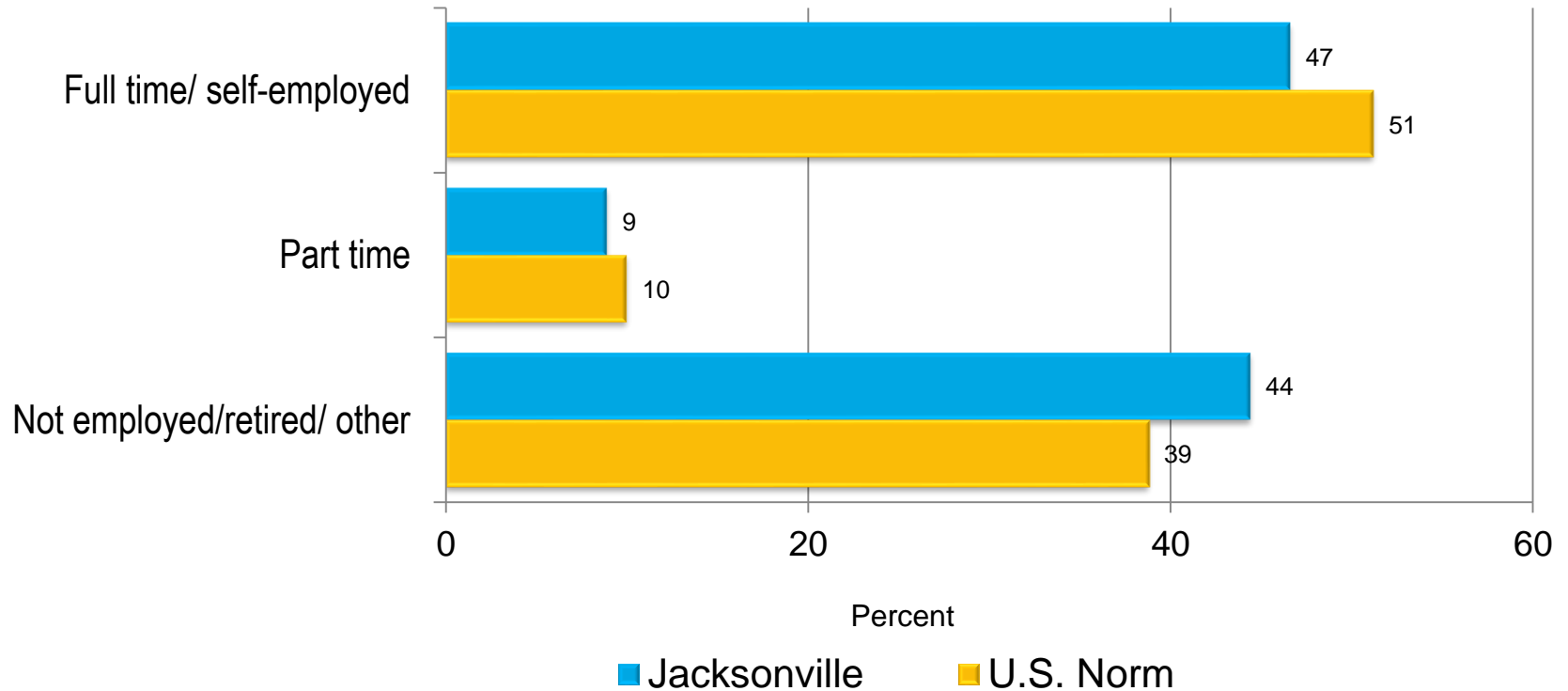
Base: Total Overnight Person-Trips



Employment



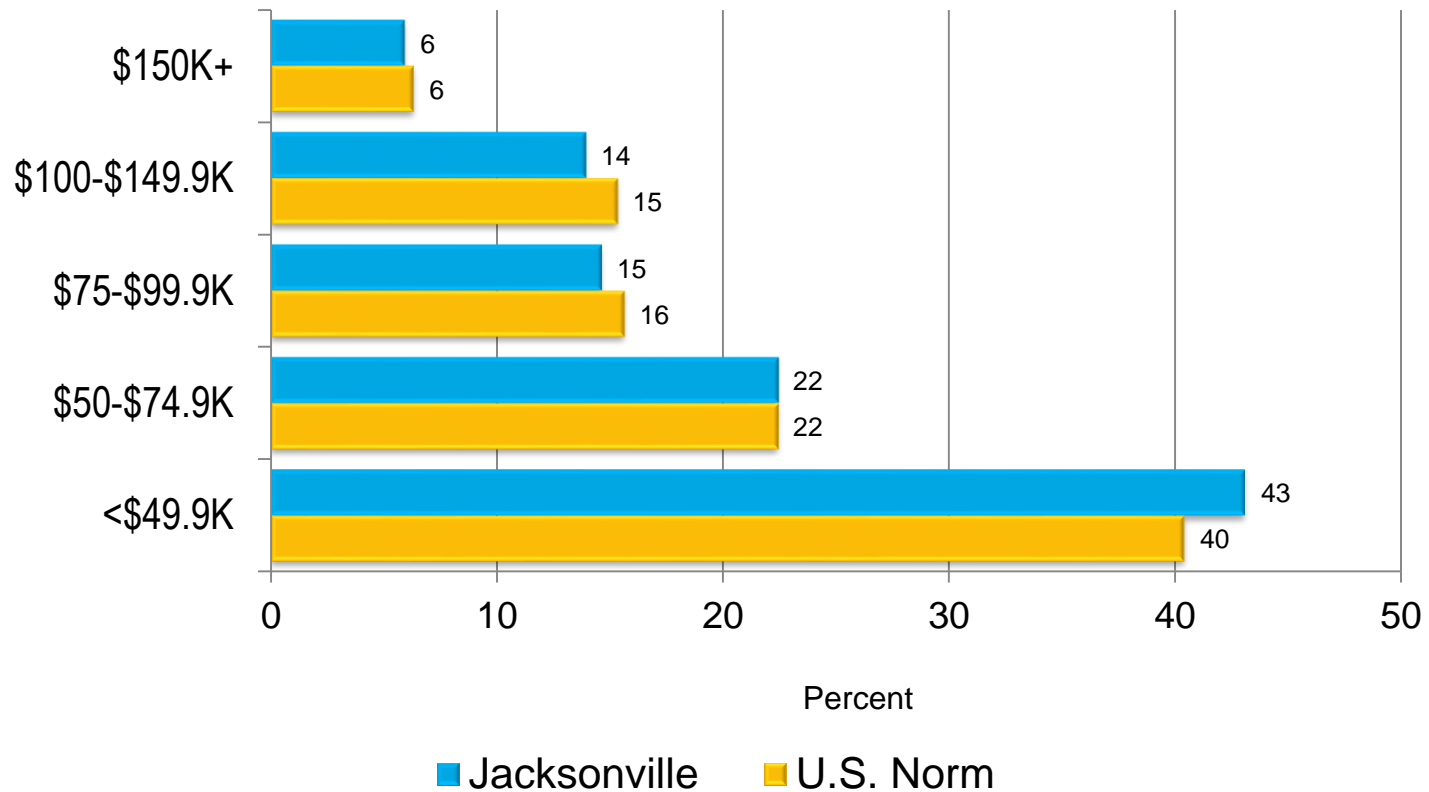
Base: Total Overnight Person-Trips



Household Income



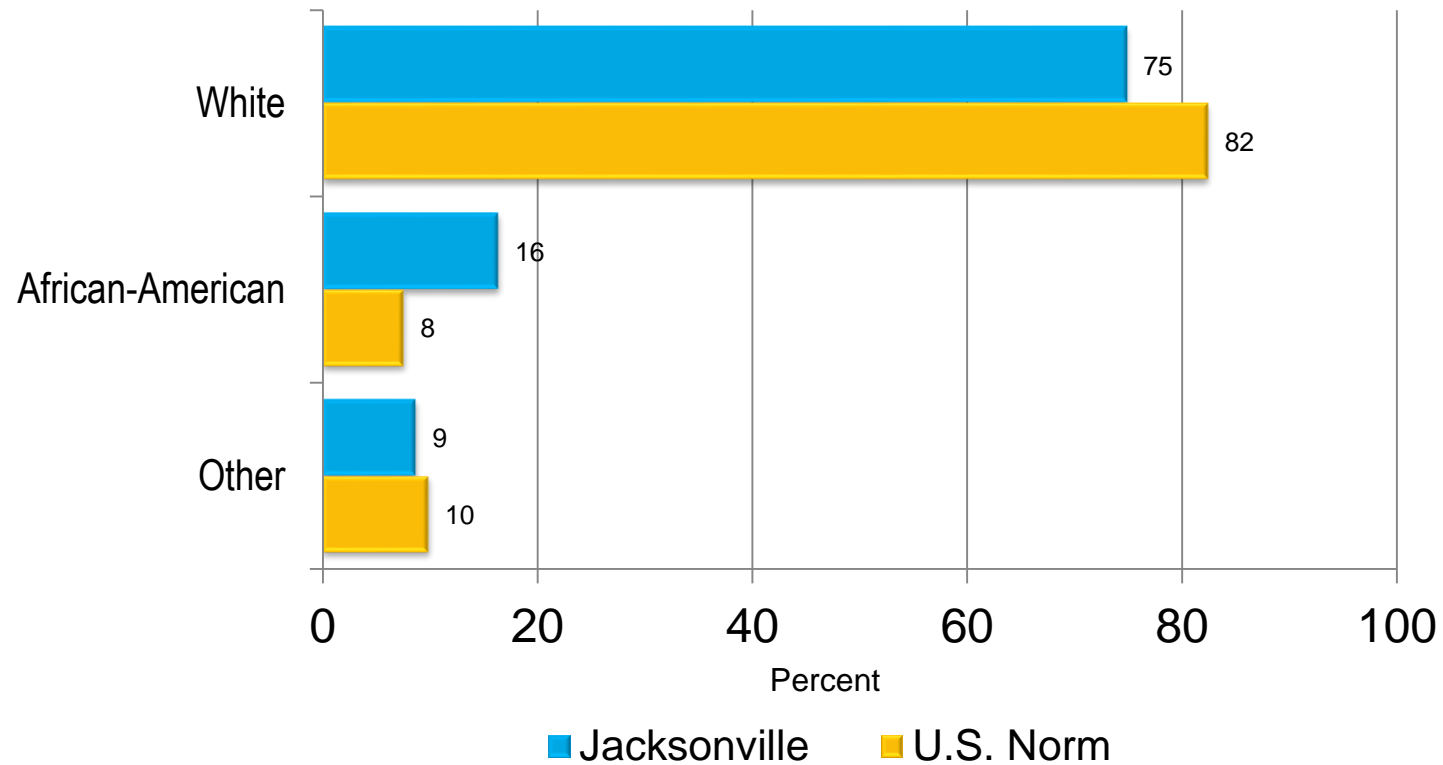
Base: Total Overnight Person-Trips



Race



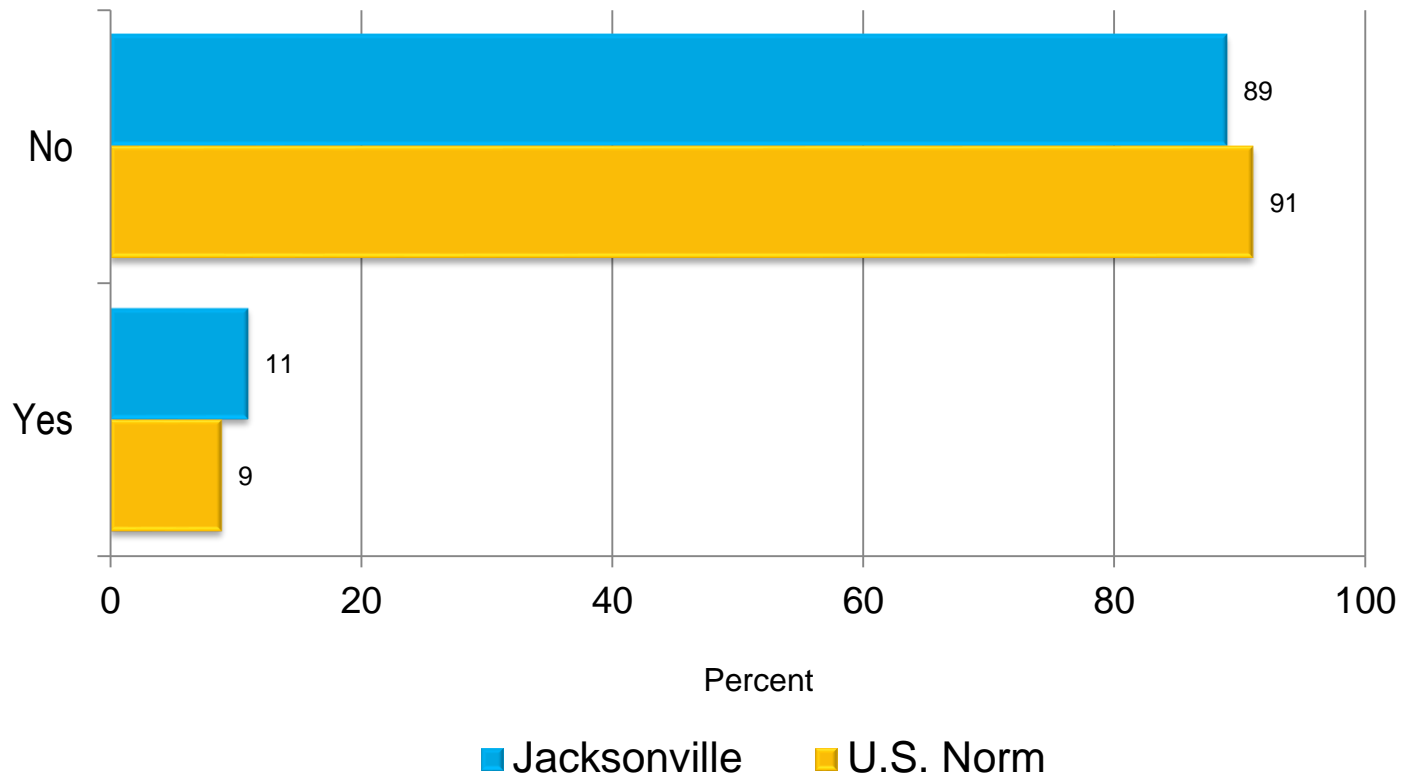
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Day Trip Detail



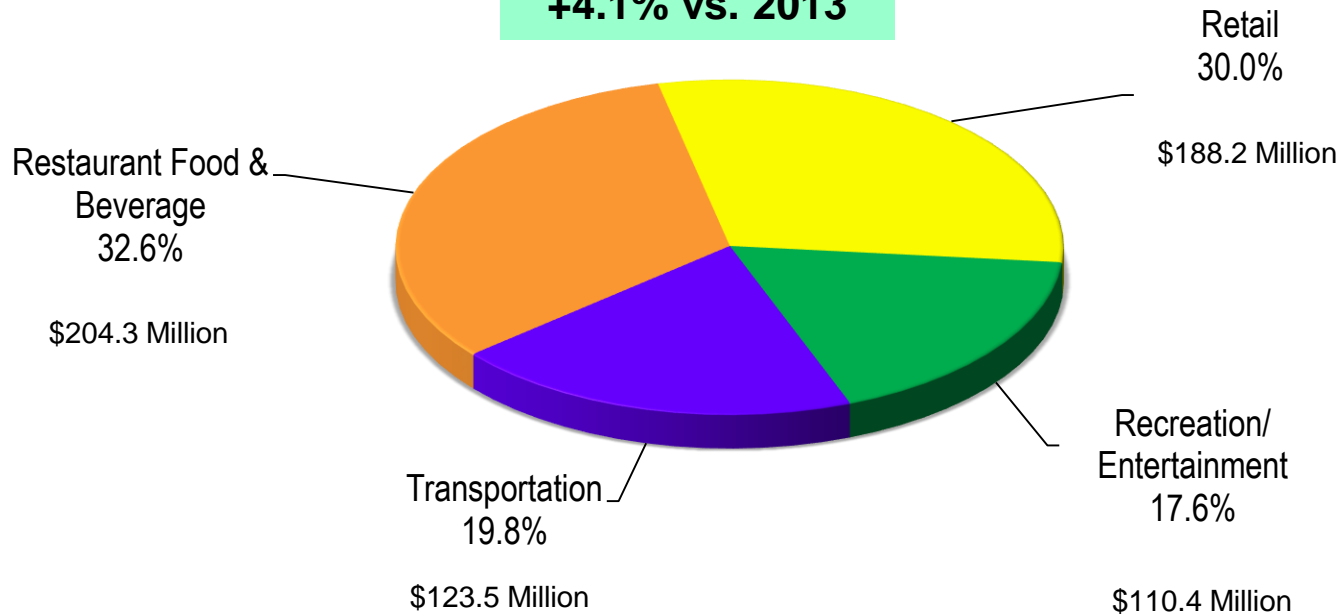
Day Trip Expenditures

Total Jacksonville Domestic Day Trip Spending – by Sector



Total Spending = \$626.4 Million

+4.1% vs. 2013

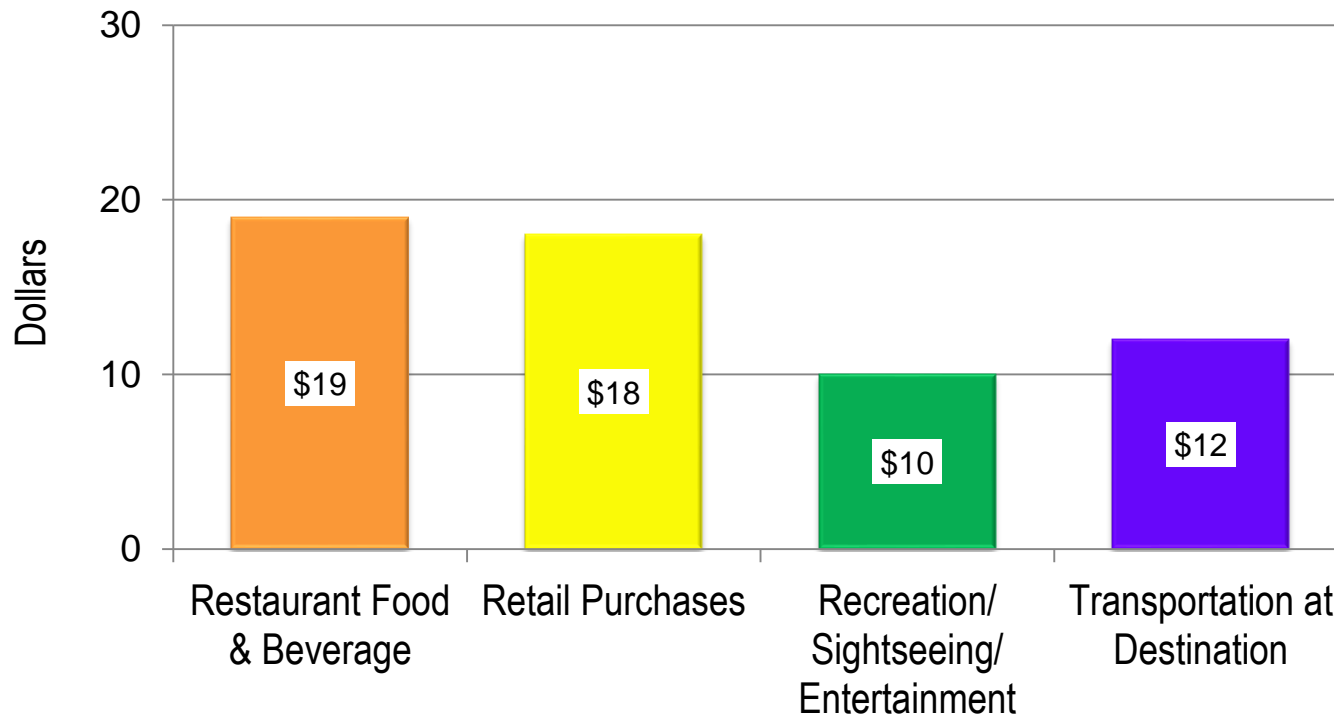


Source: Tourism Economics

Average Per Person Expenditures on Day Trips – By Sector



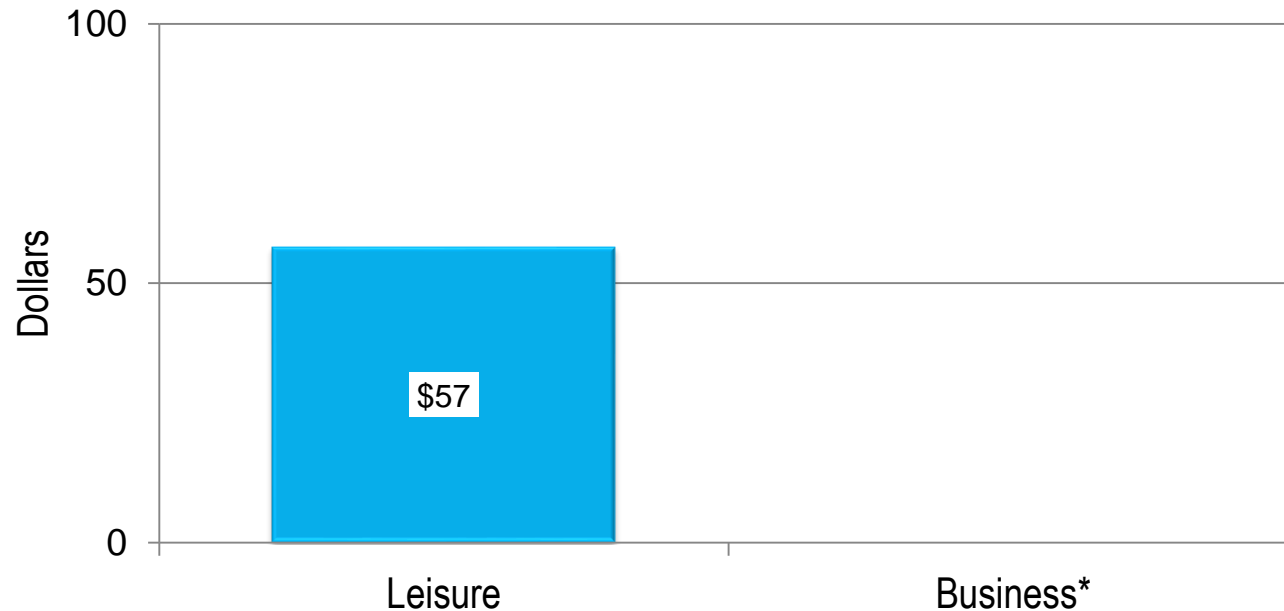
Base: Total Day Person-Trips to Jacksonville



Average Per Person Expenditures on Day Trips – by Trip Purpose



Base: Total Day Person-Trips to Jacksonville

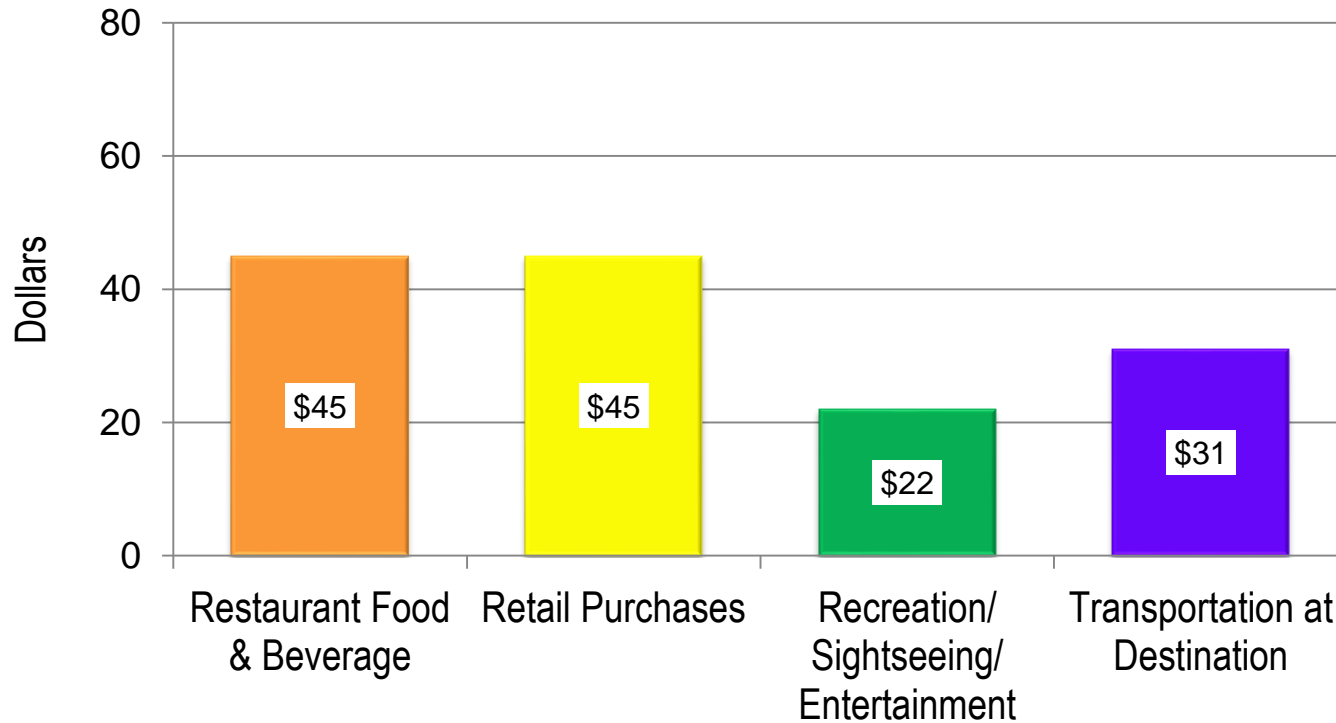


* Low base sizes

Average Per Party Expenditures on Day Trips – By Sector



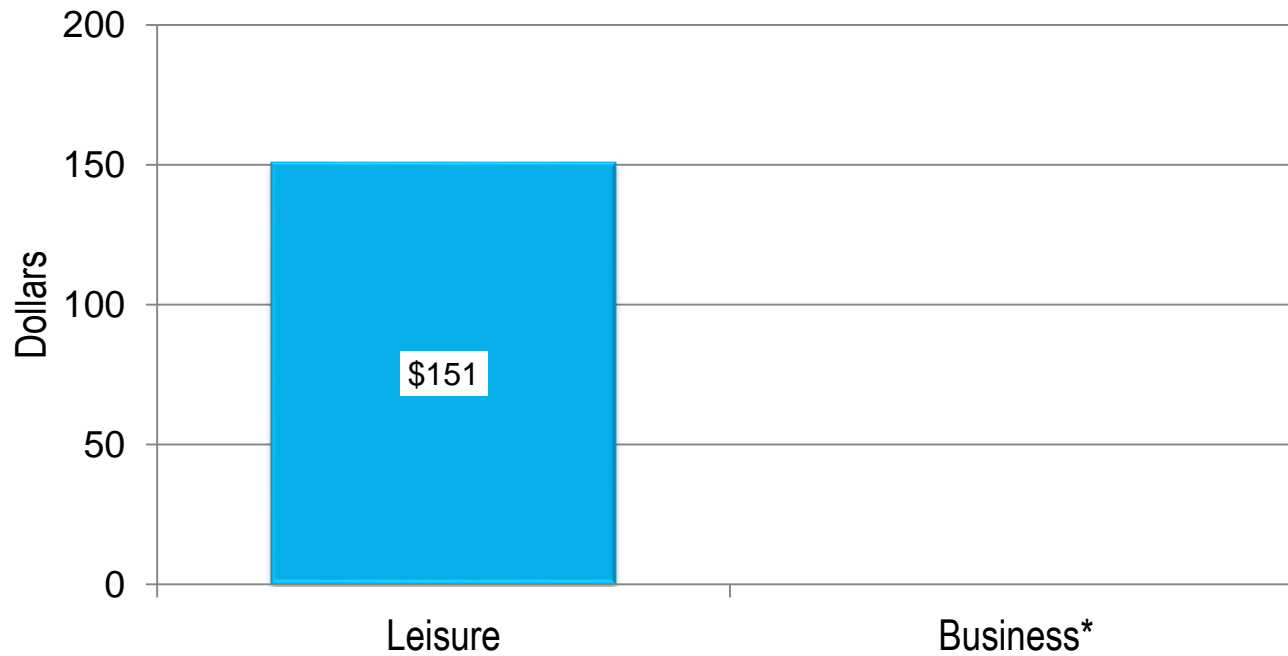
Base: Total Day Person-Trips to Jacksonville



Average Per Party Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips to Jacksonville



* Low base sizes

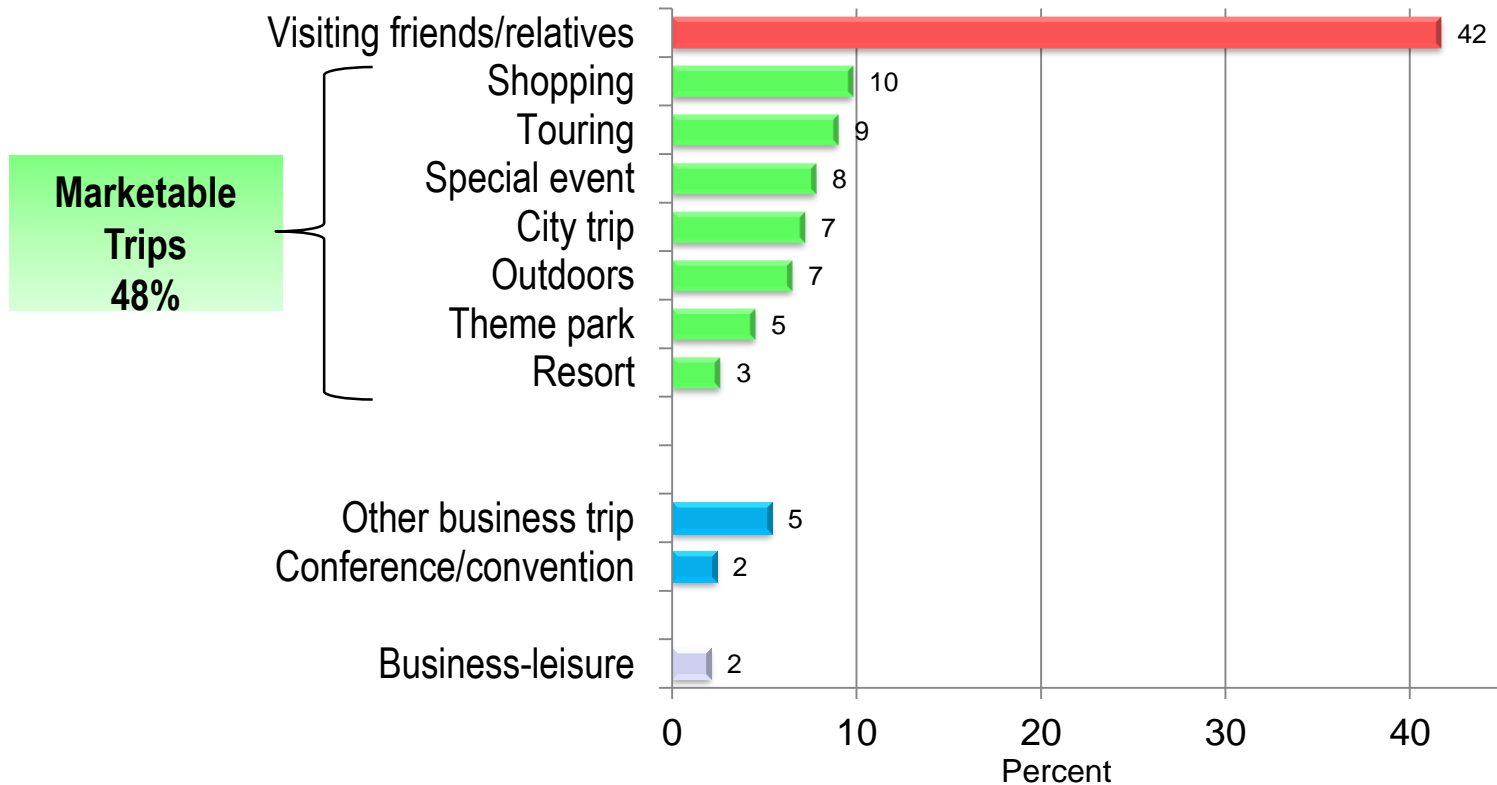


Day Trip Characteristics

Main Purpose of Trip



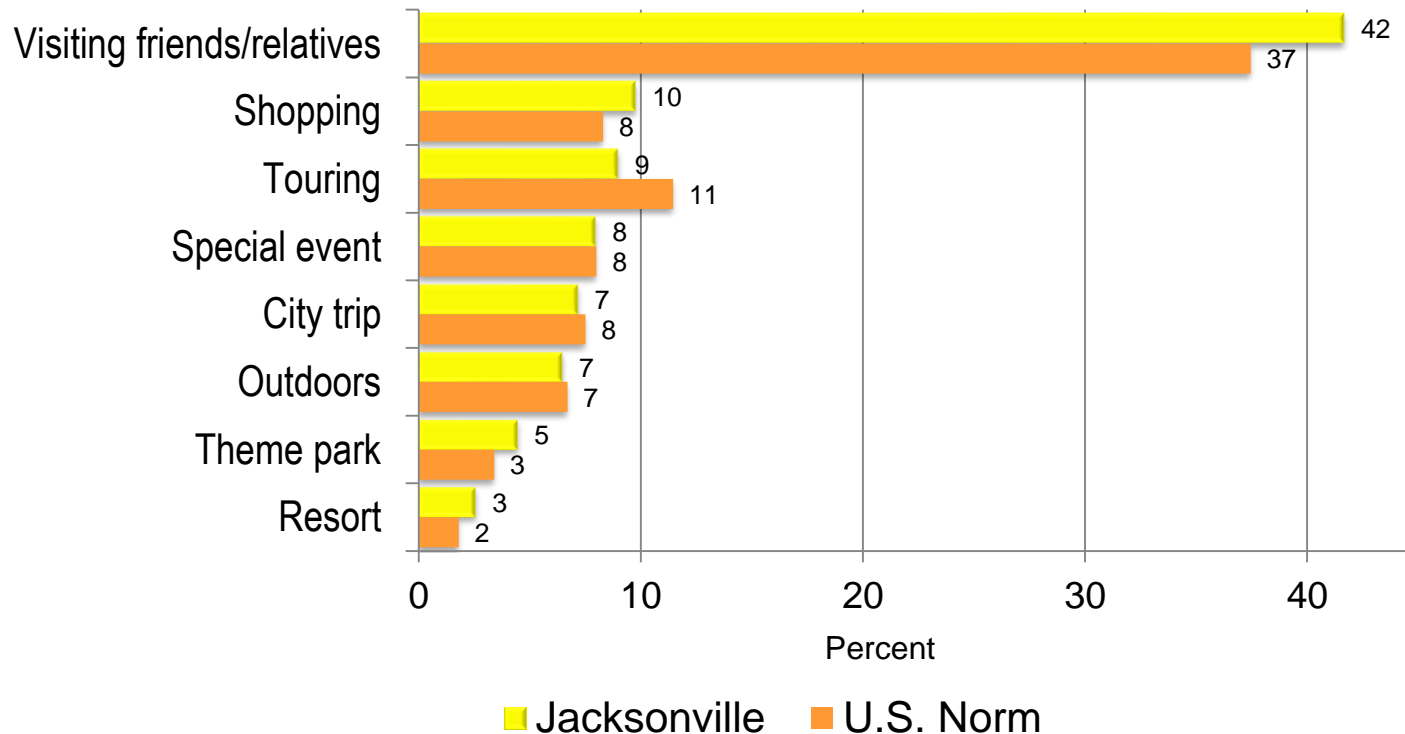
Base: Total Day Person-Trips to Jacksonville



Main Purpose of Leisure Trip – Jacksonville vs. National Norm



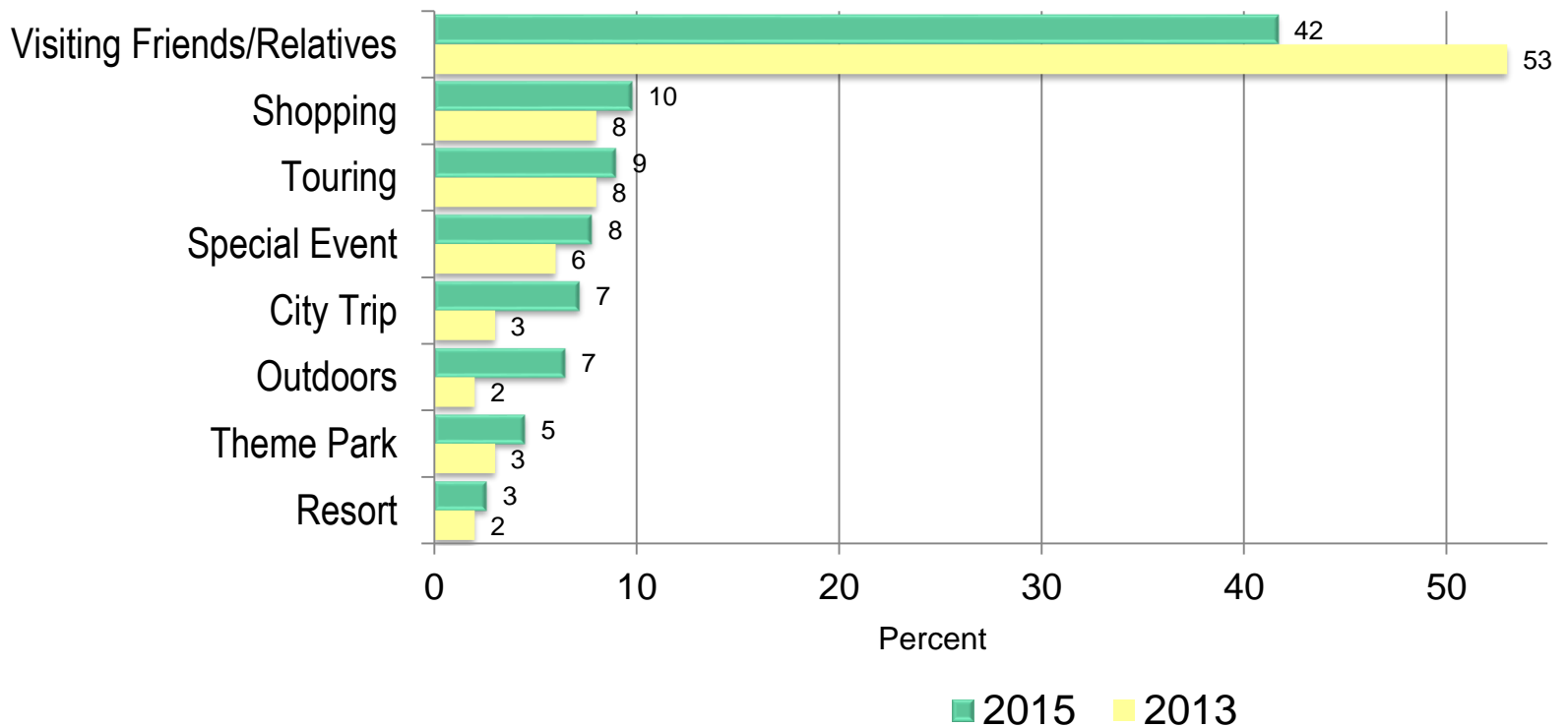
Base: Total Day Person-Trips



Main Purpose of Day Leisure Trip to Jacksonville – 2015 vs. 2013



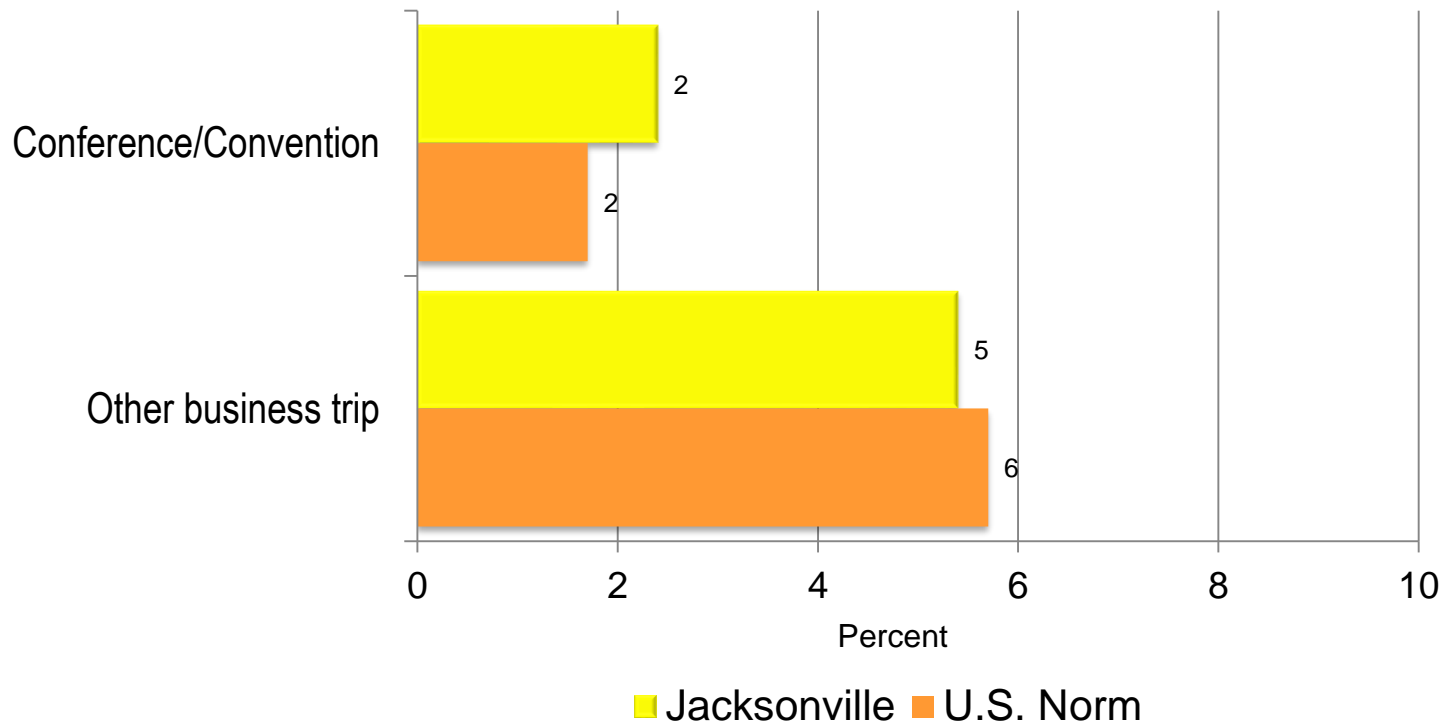
Base: Total Day Person-Trips to Jacksonville



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



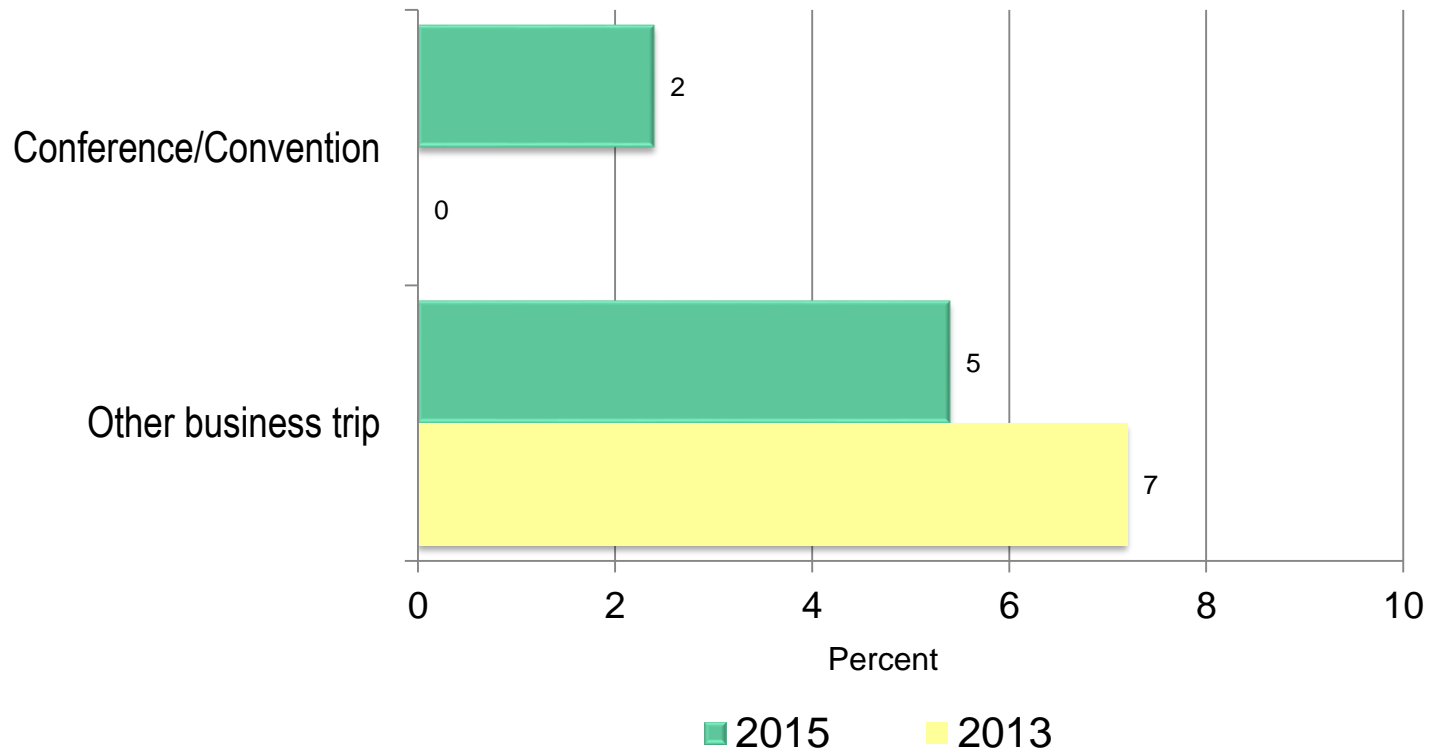
Base: Total Day Person-Trips



Main Purpose of Day Business Trip to Jacksonville – 2015 vs. 2013



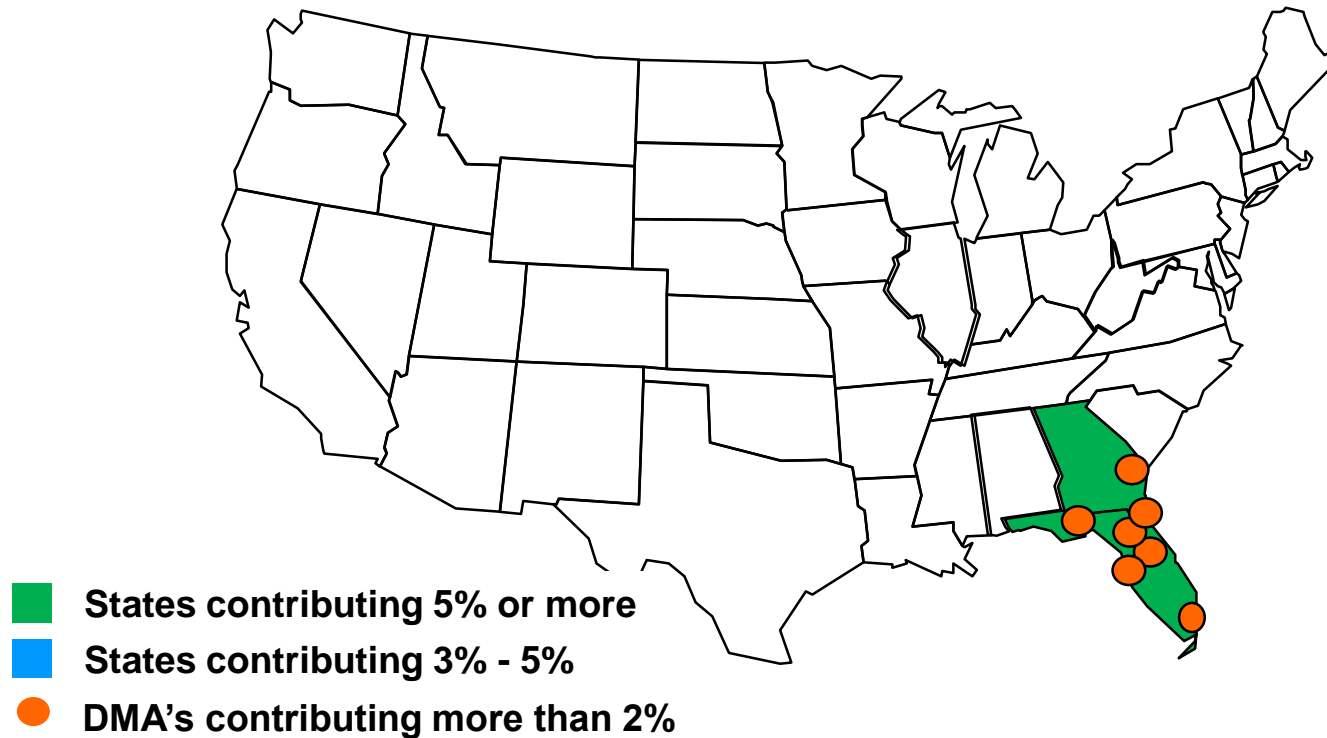
Base: Total Day Person-Trips to Jacksonville



Sources of Business



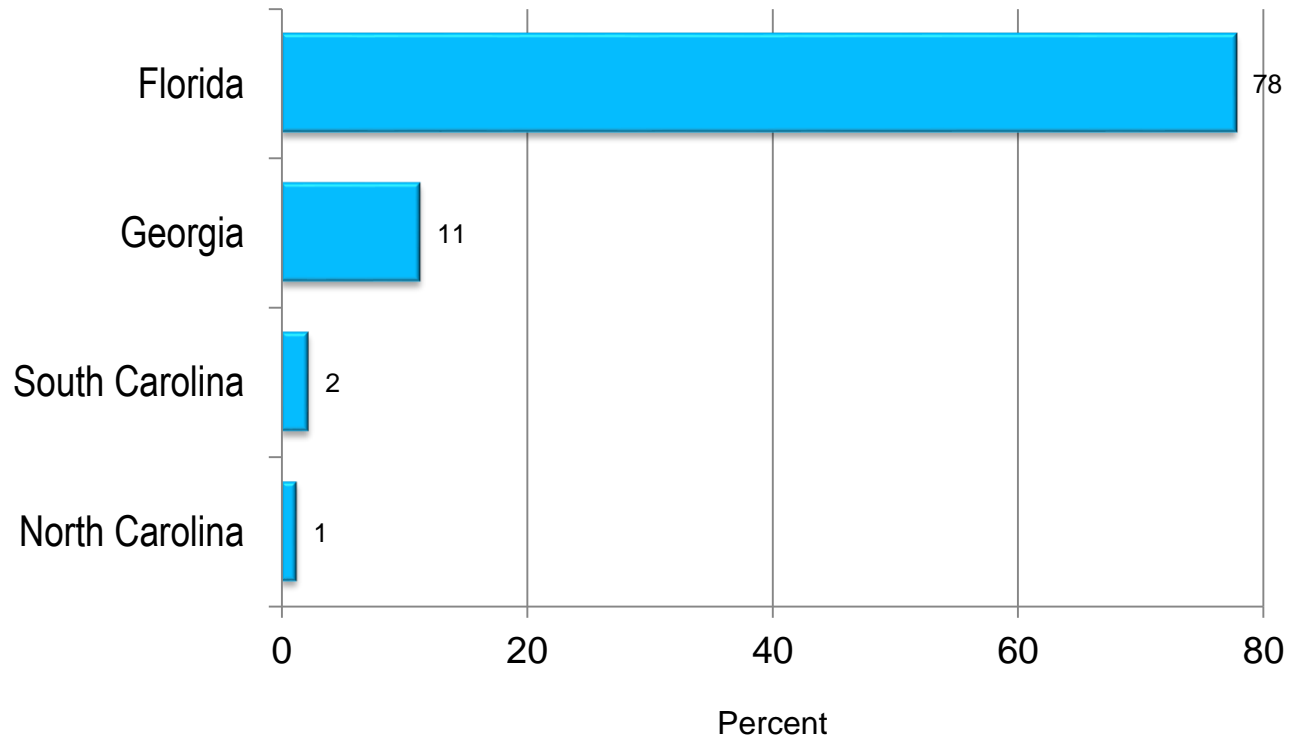
Base: Total Day Person-Trips to Jacksonville



State Origin Of Trip



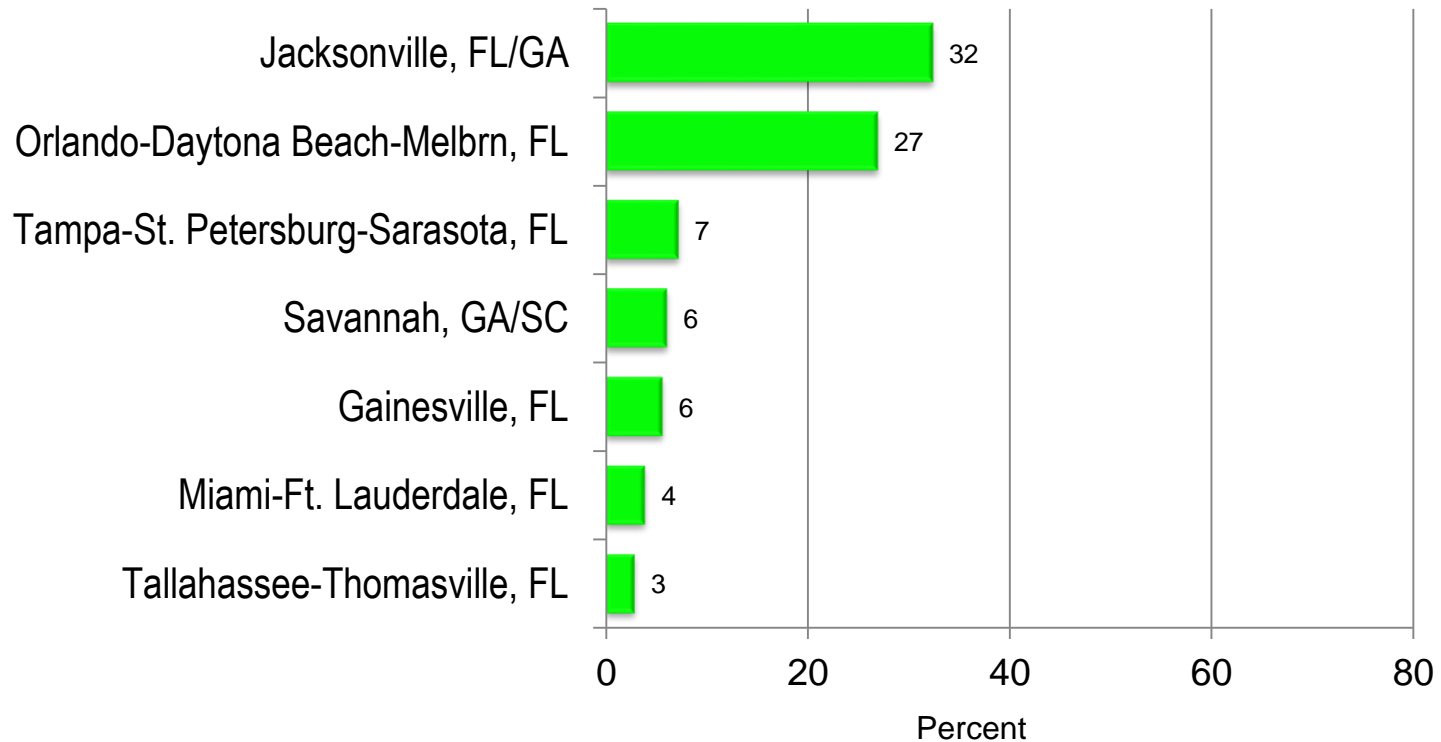
Base: Total Day Person-Trips to Jacksonville



DMA Origin Of Trip



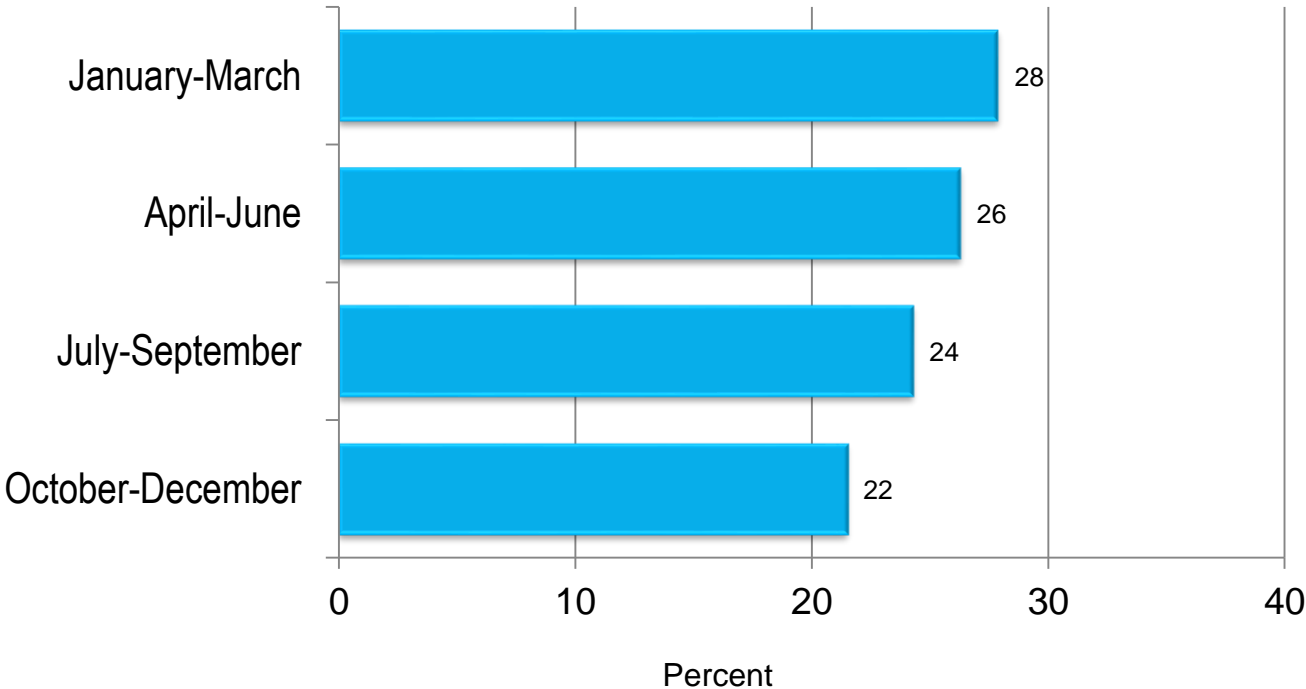
Base: Total Day Person-Trips to Jacksonville



Season of Trip



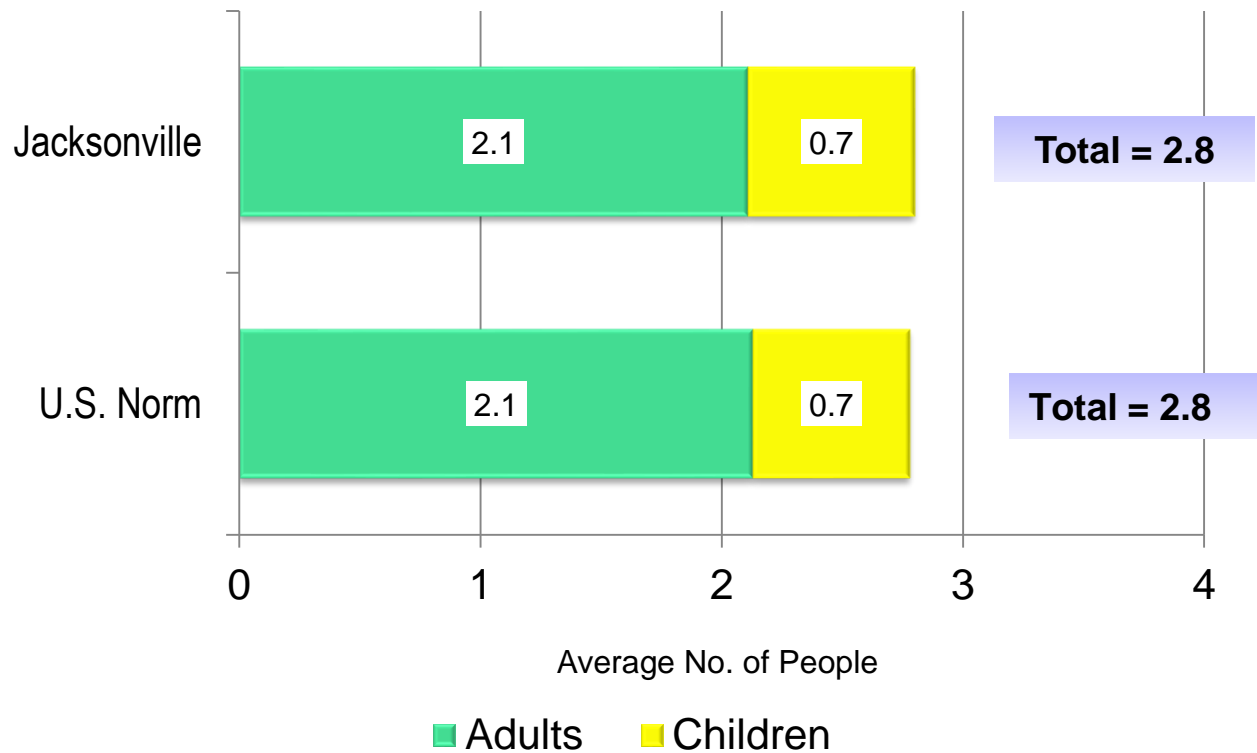
Base: Total Day Person-Trips to Jacksonville



Size of Travel Party



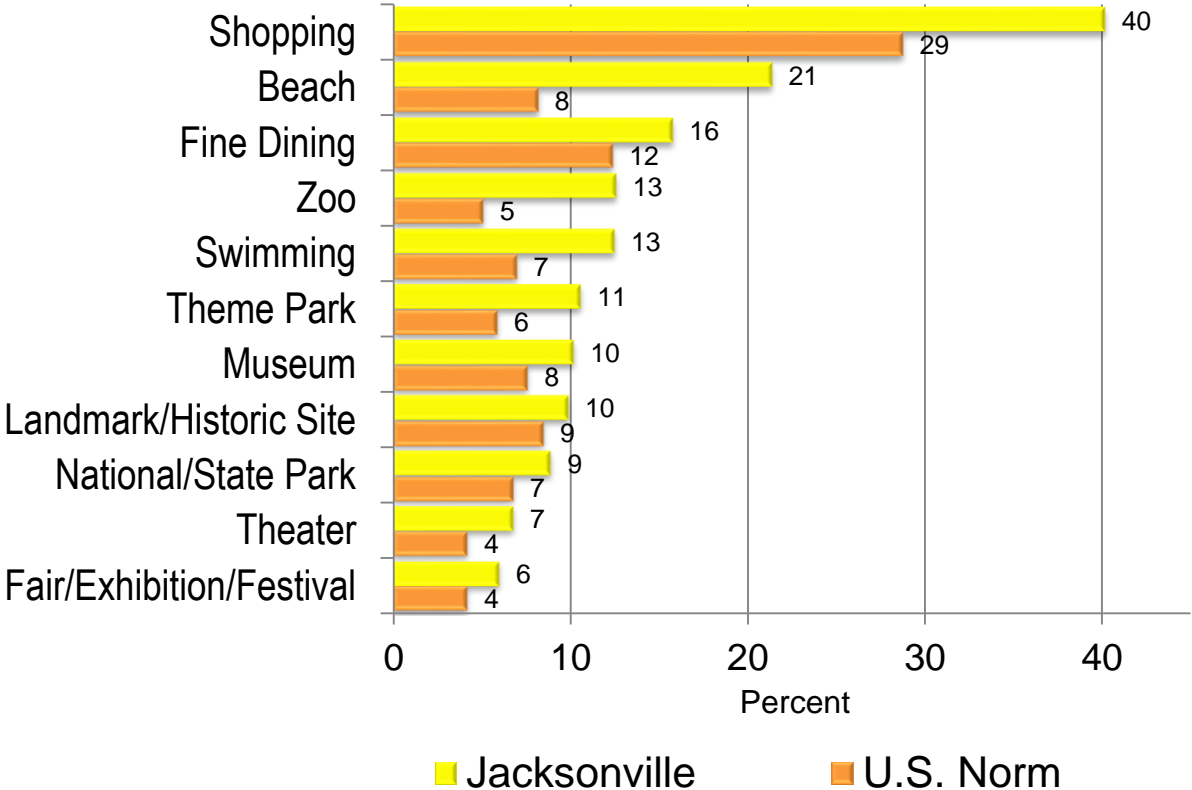
Base: Total Day Person-Trips



Activities and Experiences



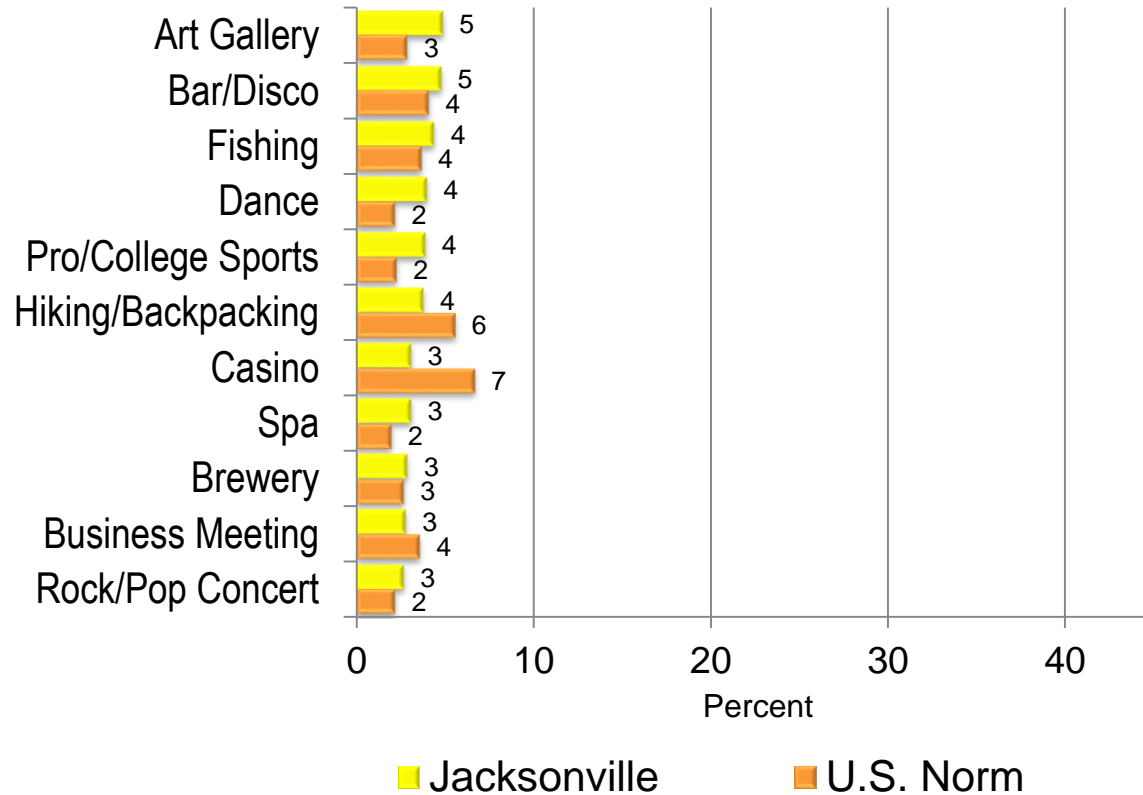
Base: Total Day Person-Trips



Activities and Experiences – (Cont'd)



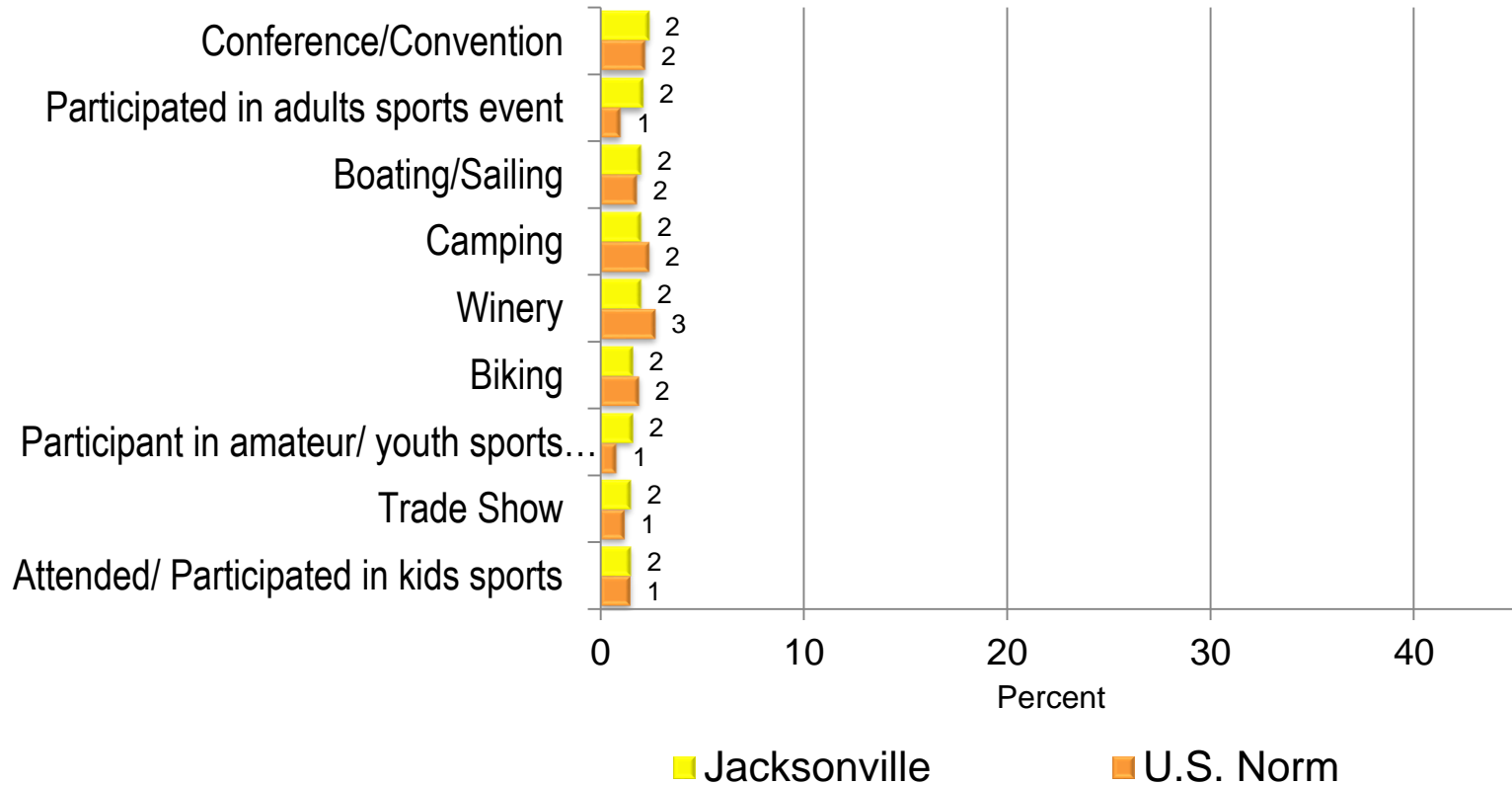
Base: Total Day Person-Trips



Activities and Experiences – (Cont'd)



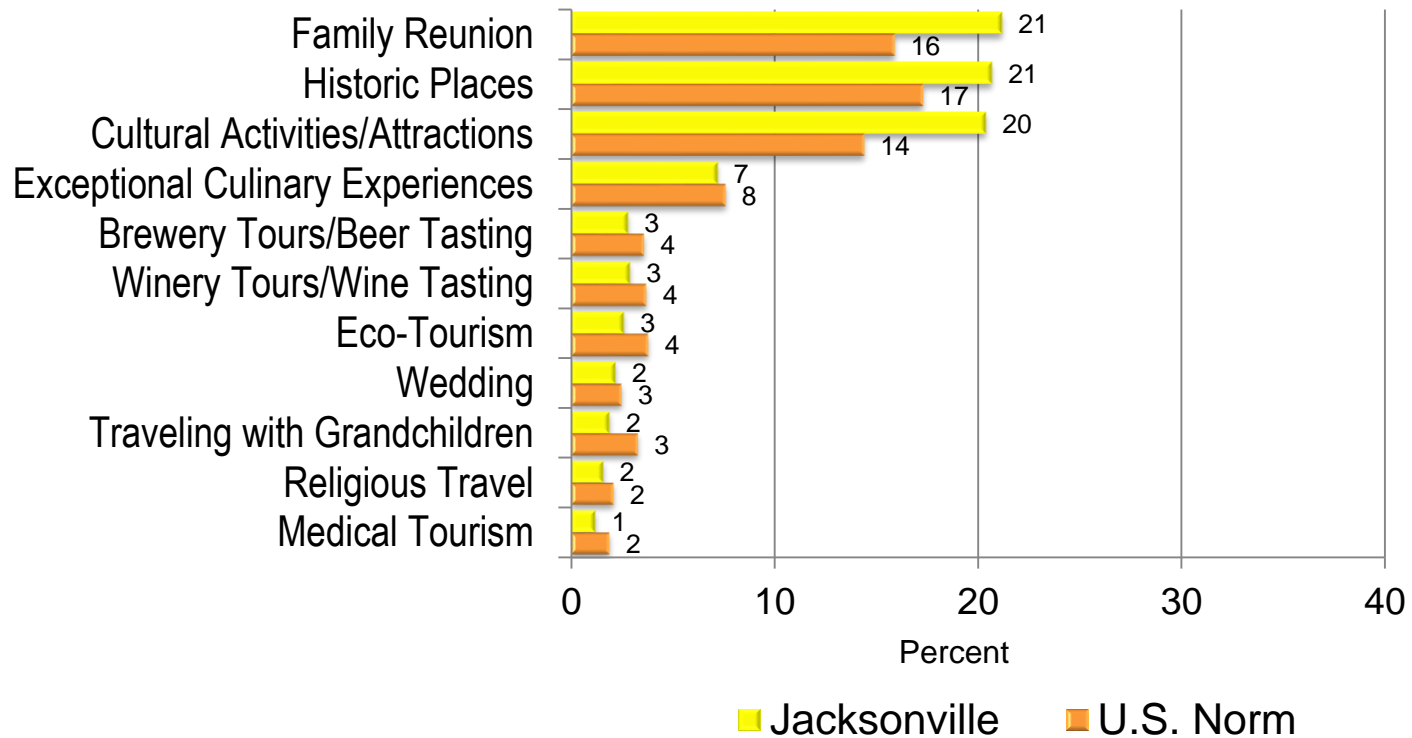
Base: Total Day Person-Trips



Activities of Special Interest



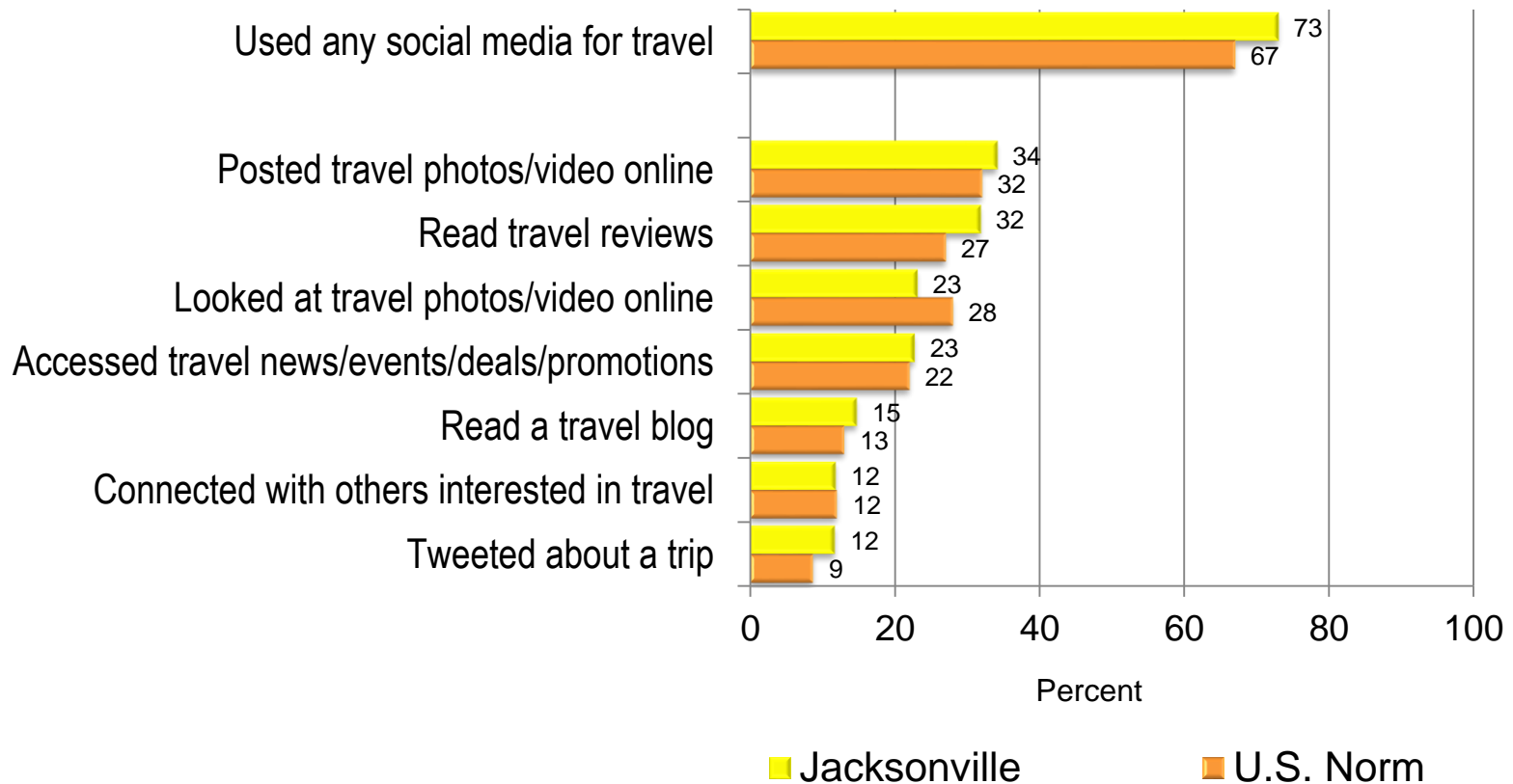
Base: Total Day Person-Trips



Online Social Media Use by Travelers



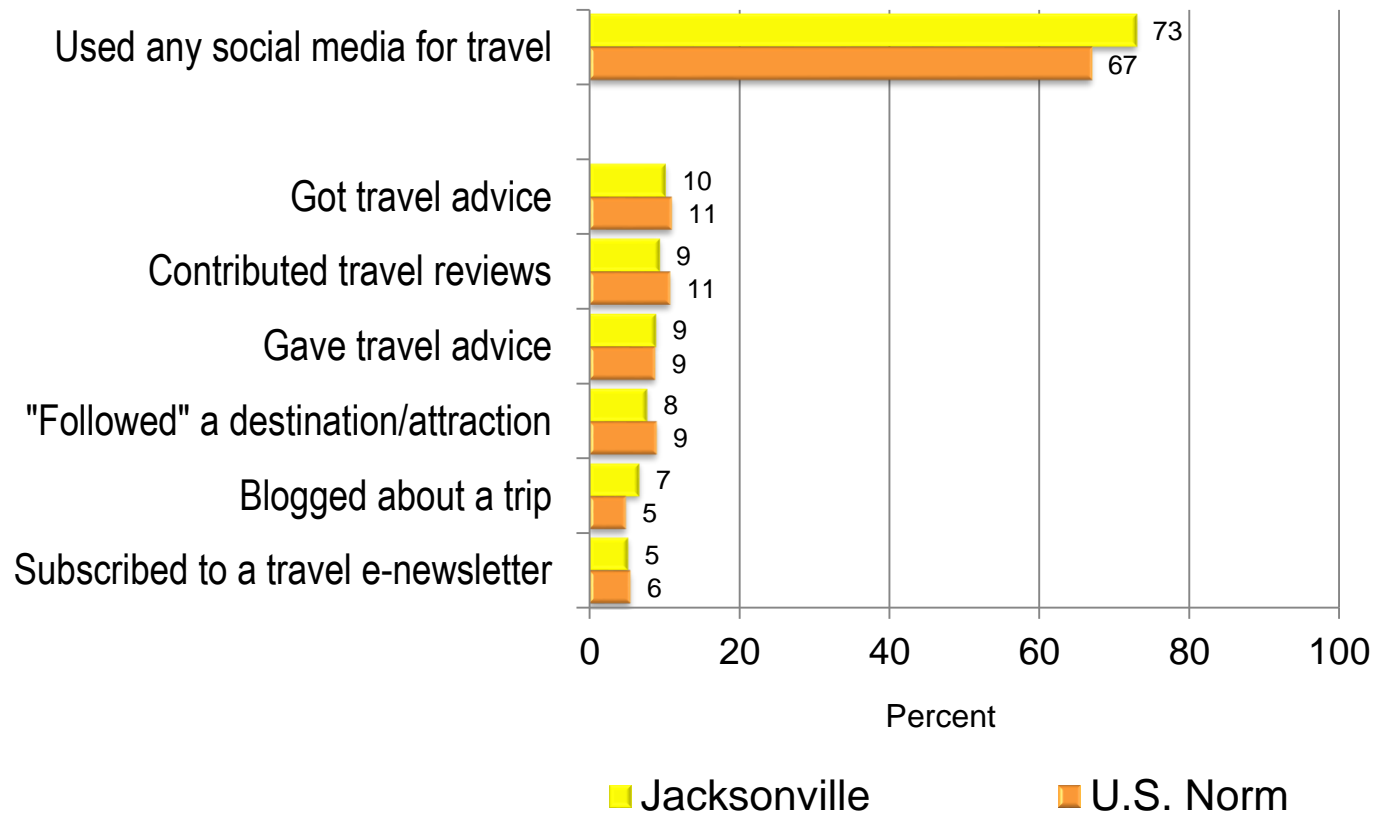
Base: Total Day Person-Trips



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



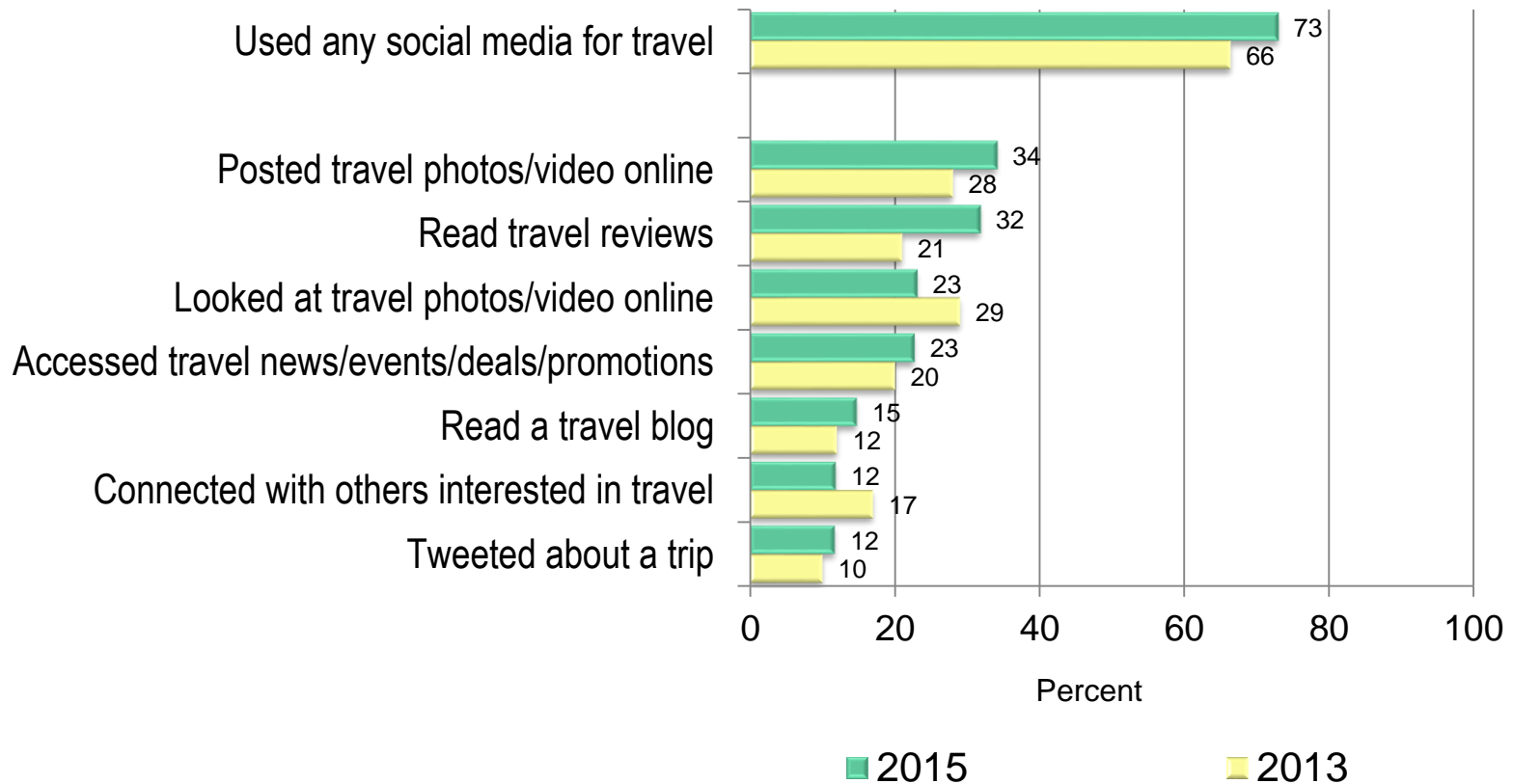
Base: Total Day Person-Trips



Use of Social Media for Travel to Jacksonville – 2015 vs. 2013



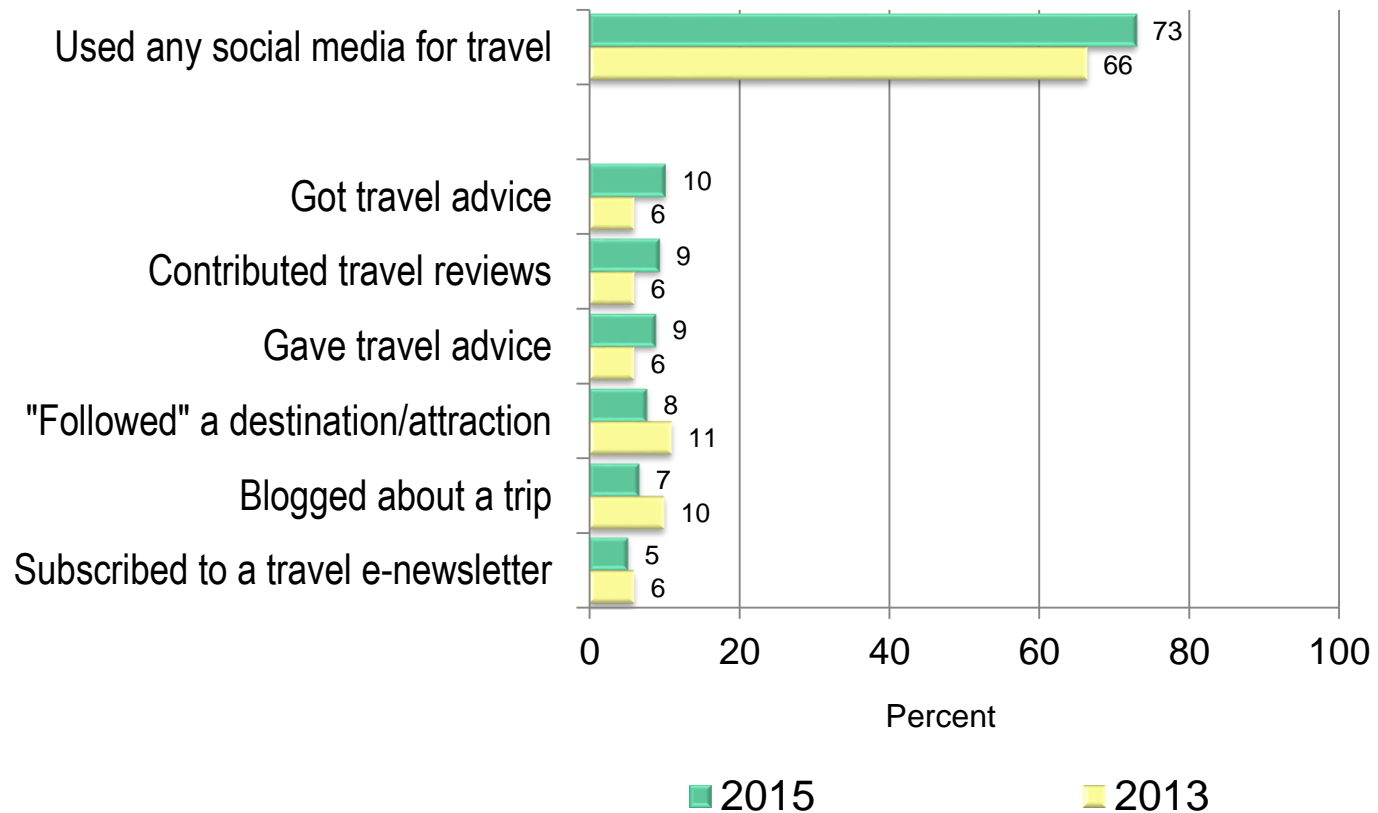
Base: Total Day Person-Trips to Jacksonville



Use of Social Media for Travel to Jacksonville – 2015 vs. 2013 – (Cont'd)



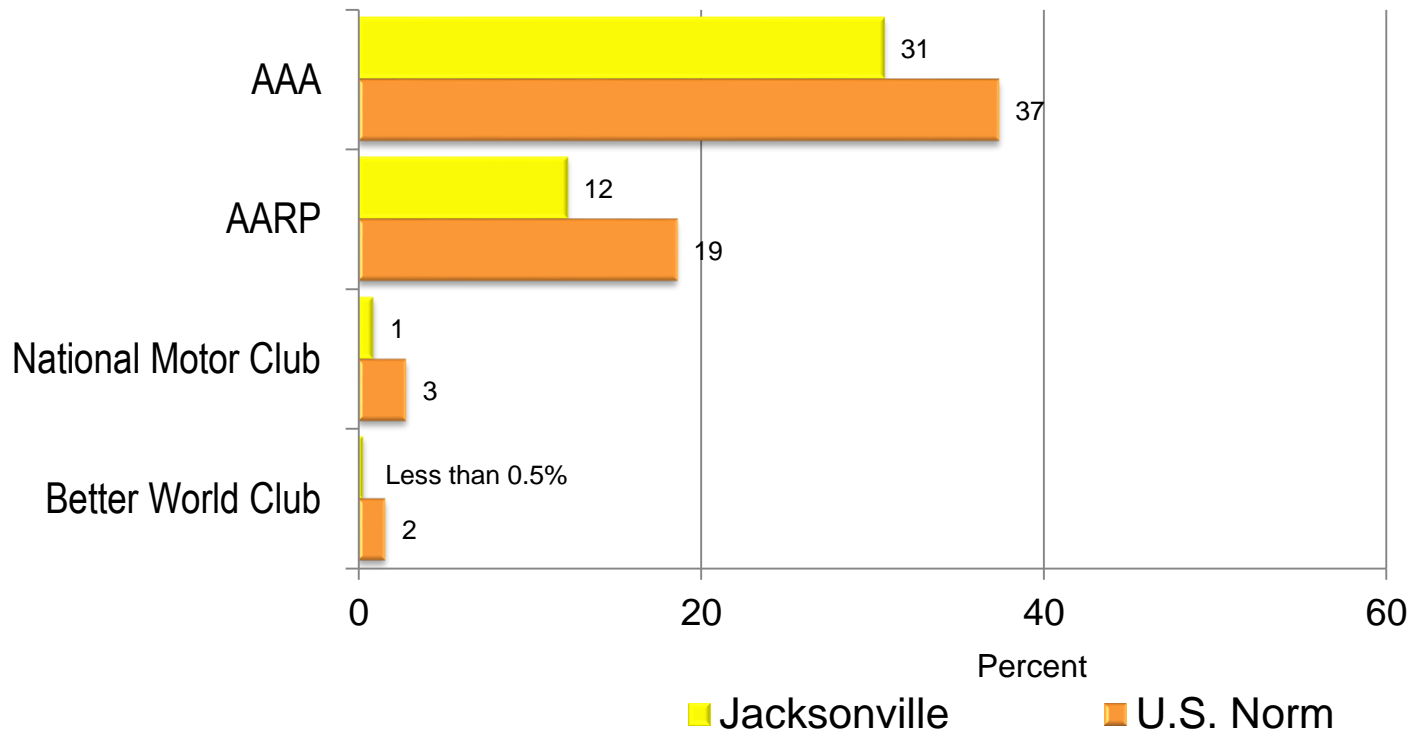
Base: Total Day Person-Trips to Jacksonville



Organization Membership



Base: Total Day Person-Trips



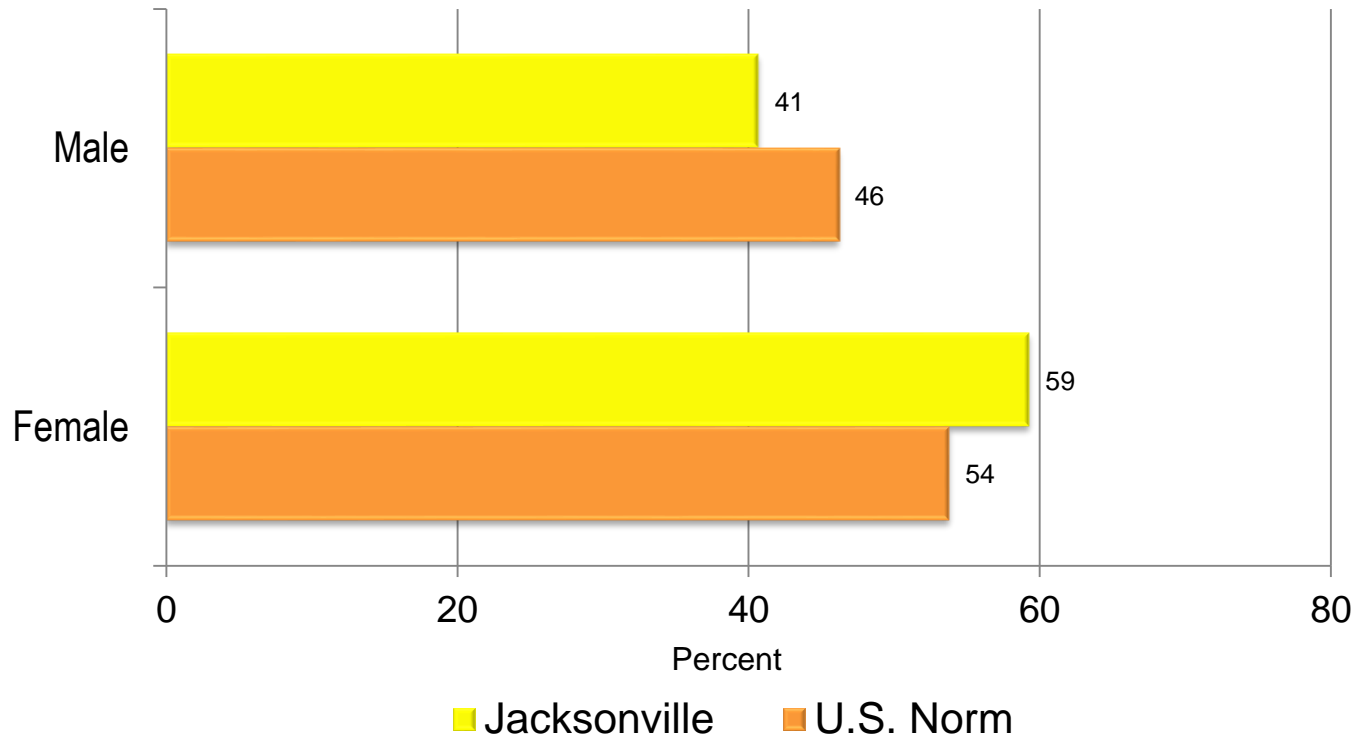


Demographic Profile of Day Visitors

Gender



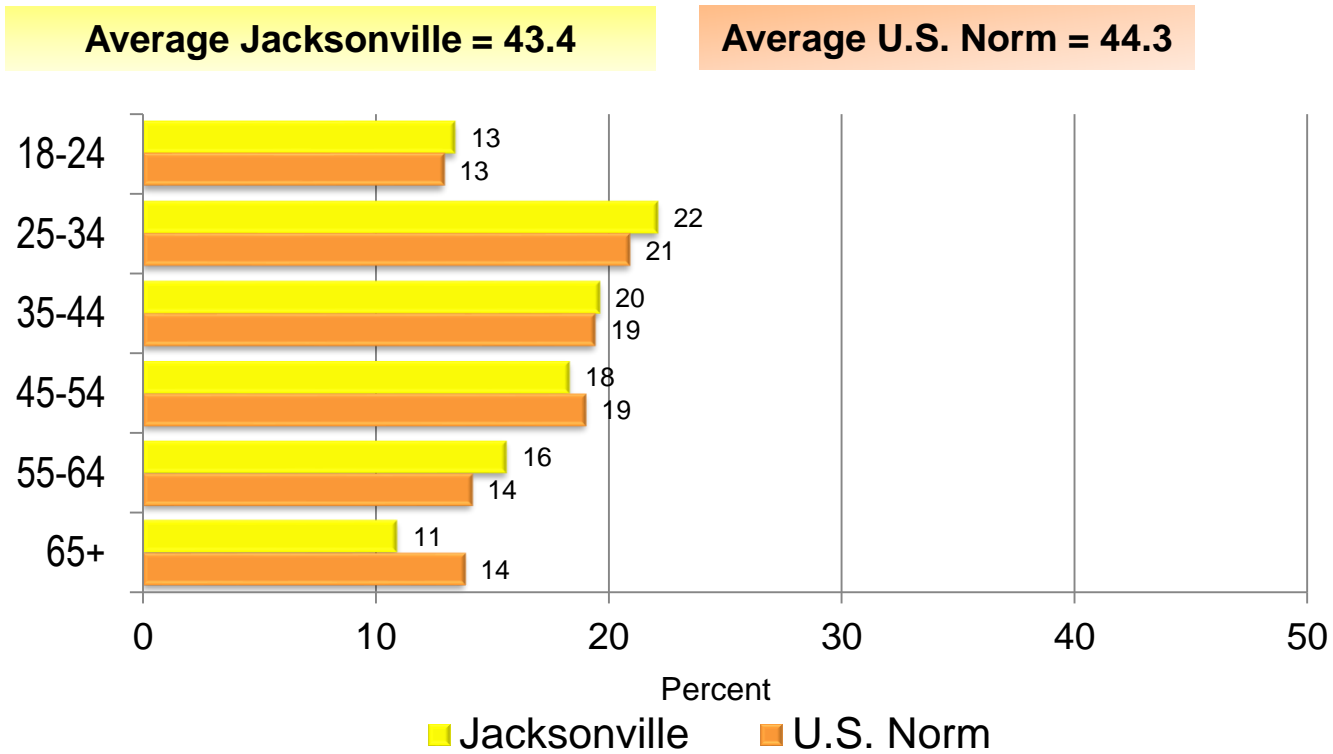
Base: Total Day Person-Trips



Age



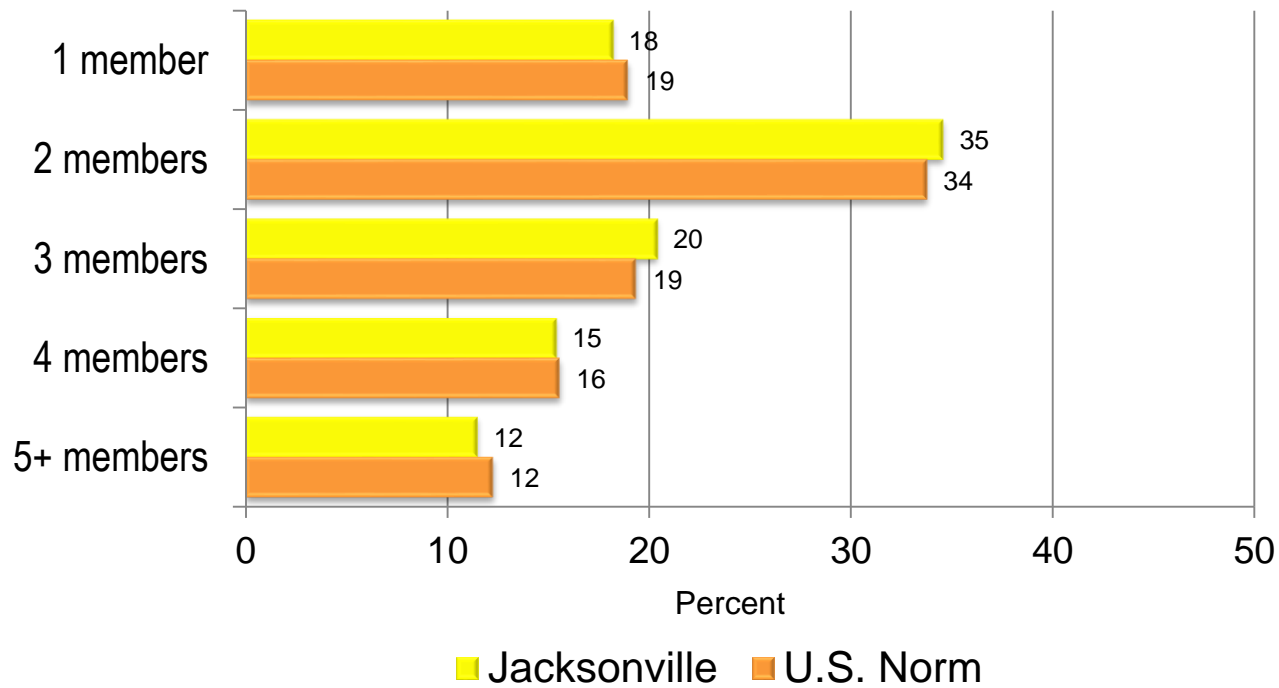
Base: Total Day Person-Trips



Household Size



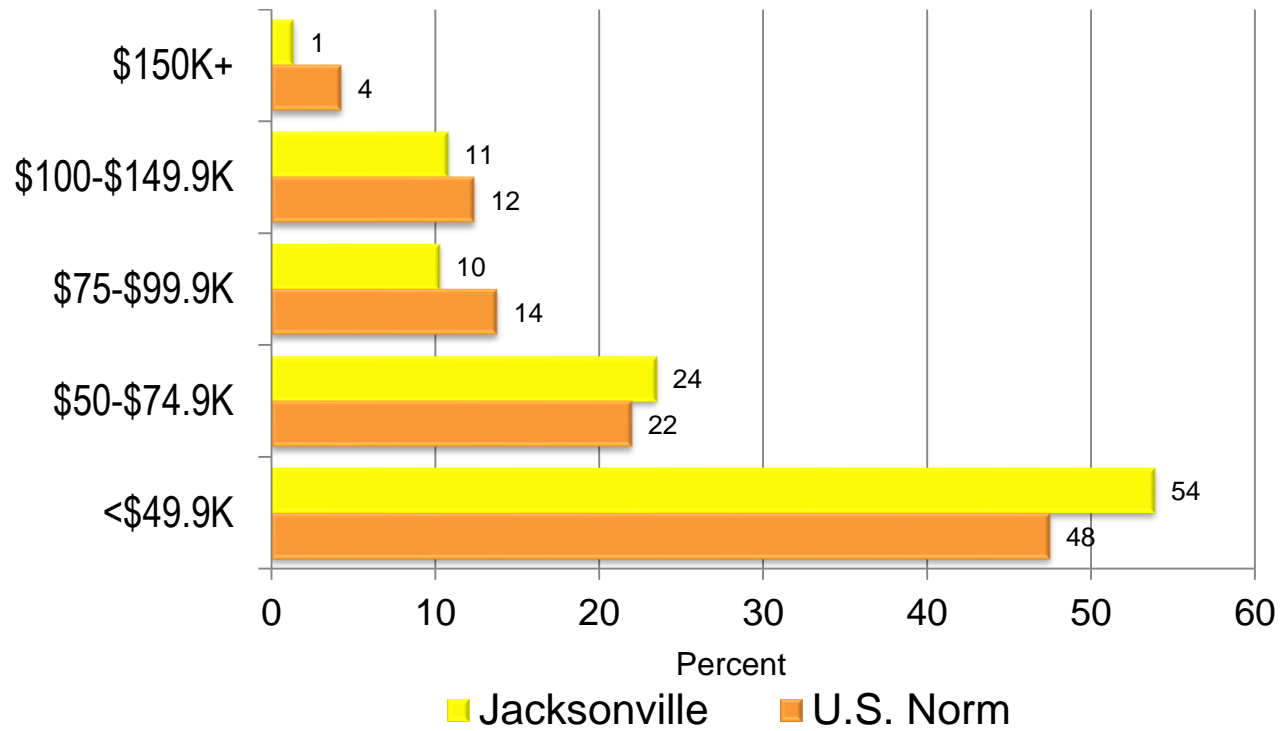
Base: Total Day Person-Trips



Household Income



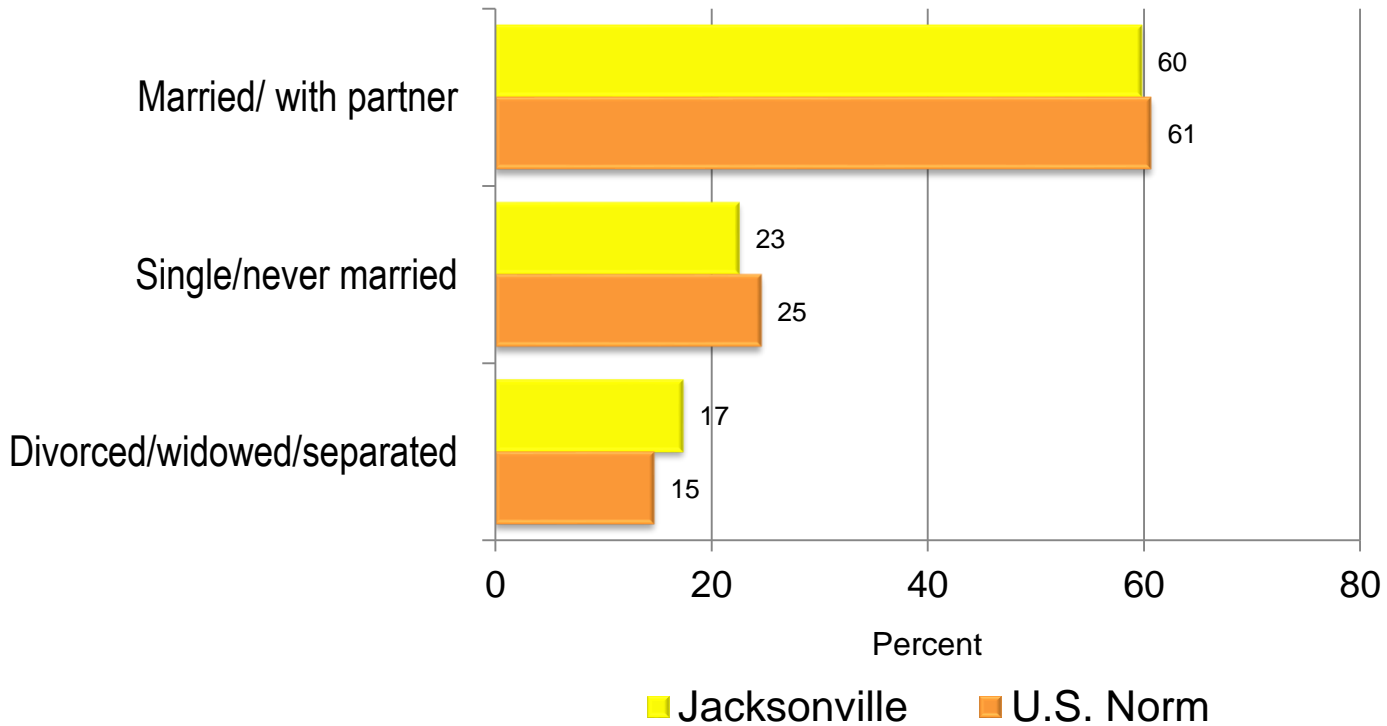
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Marital Status



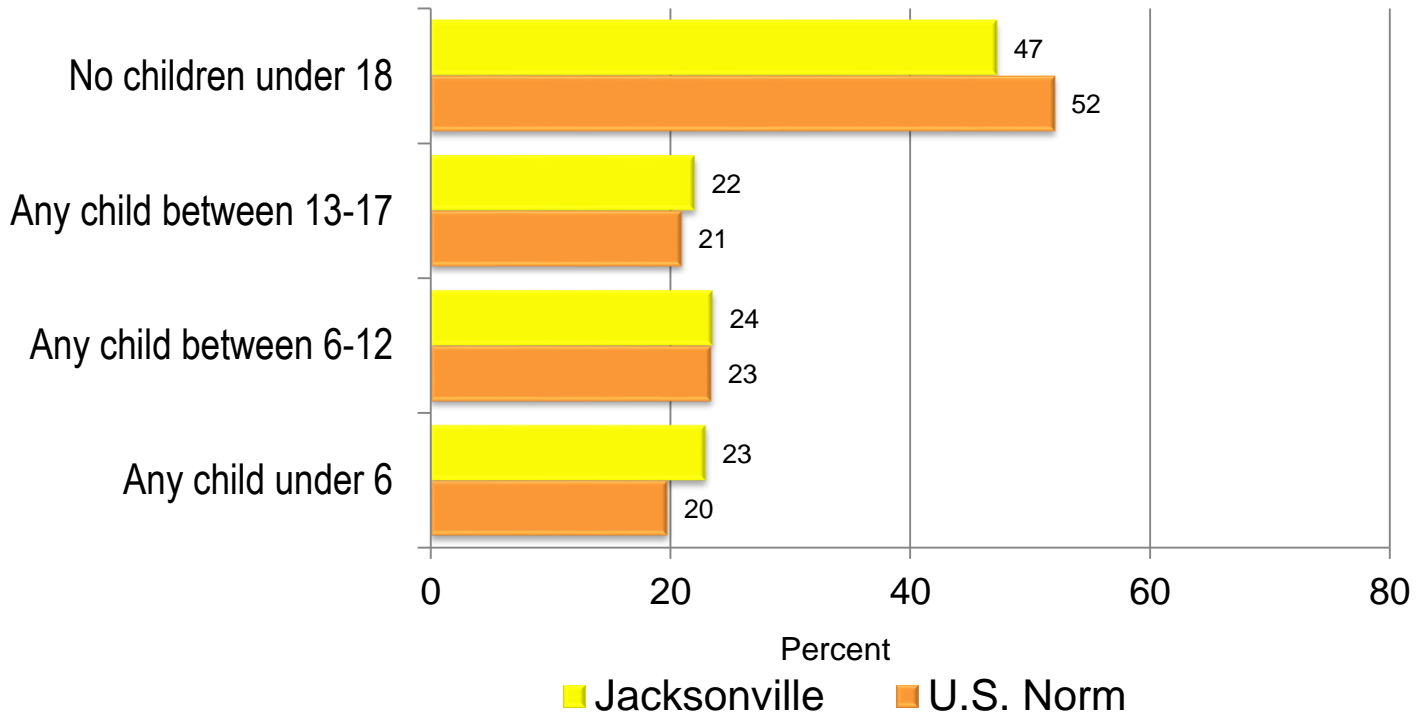
Base: Total Day Person-Trips



Children in Household



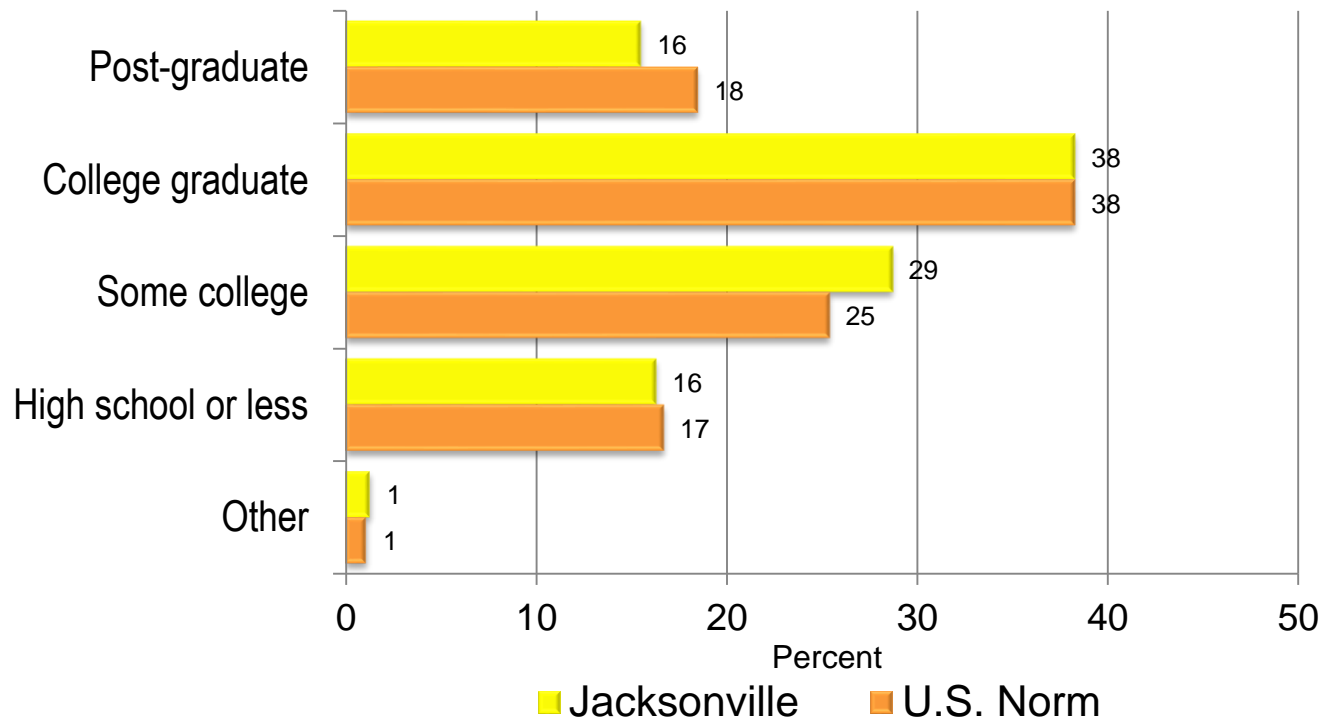
Base: Total Day Person-Trips



Education



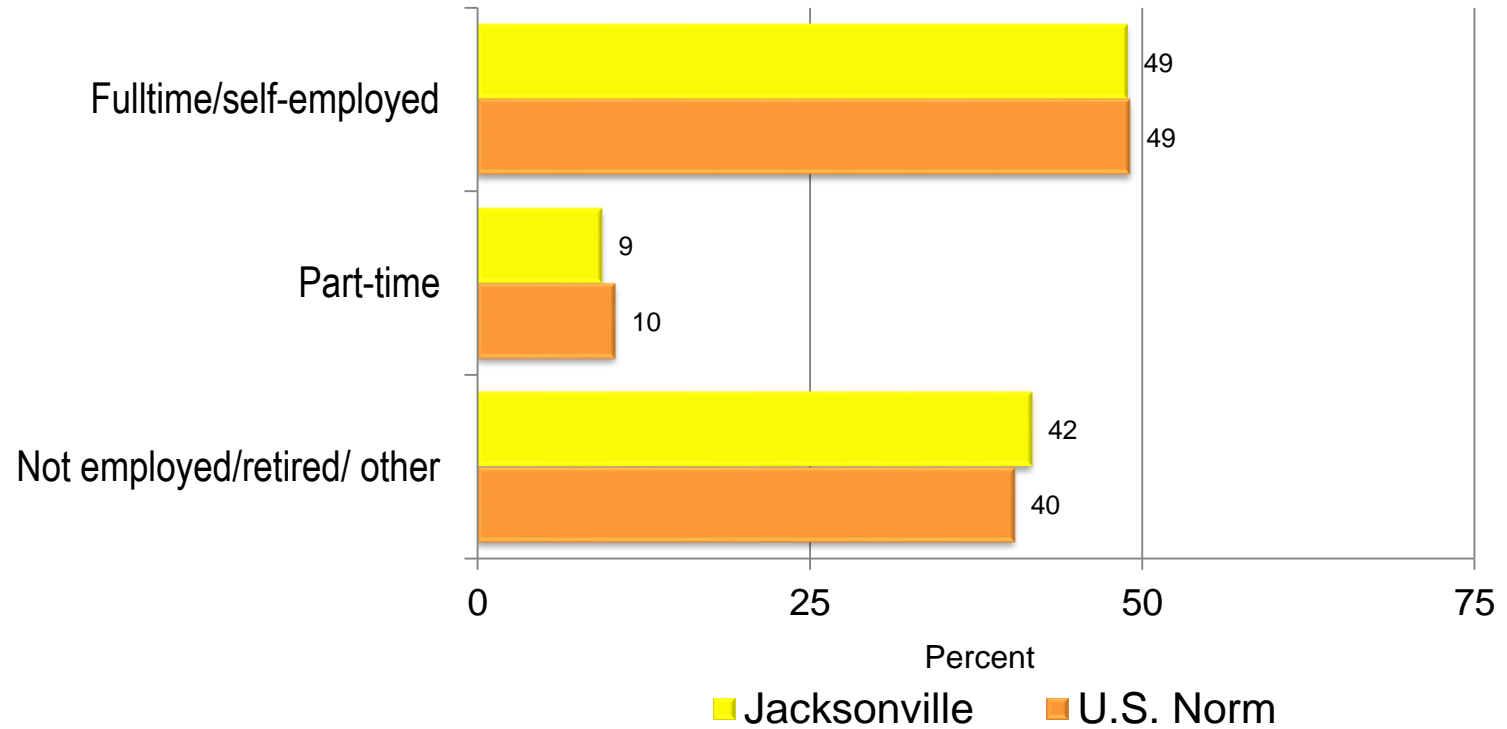
Base: Total Day Person-Trips



Employment



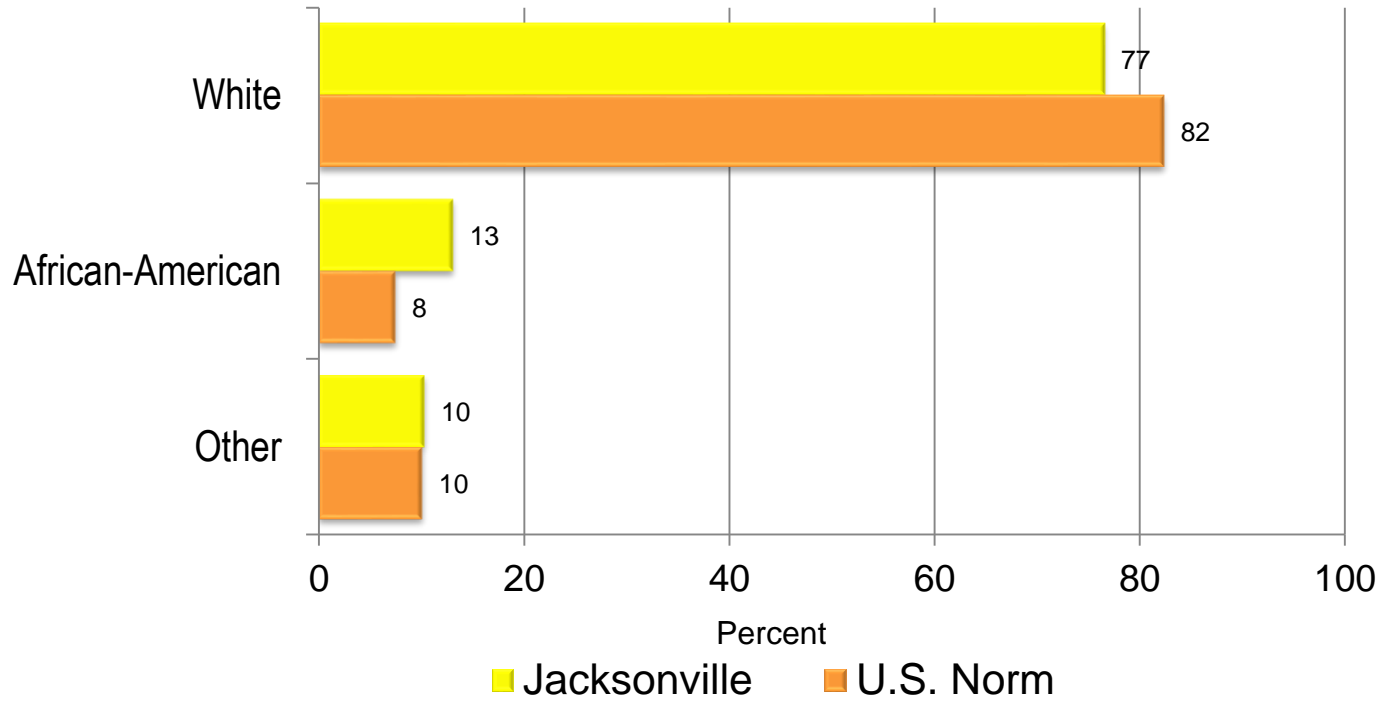
Base: Total Day Person-Trips



Race



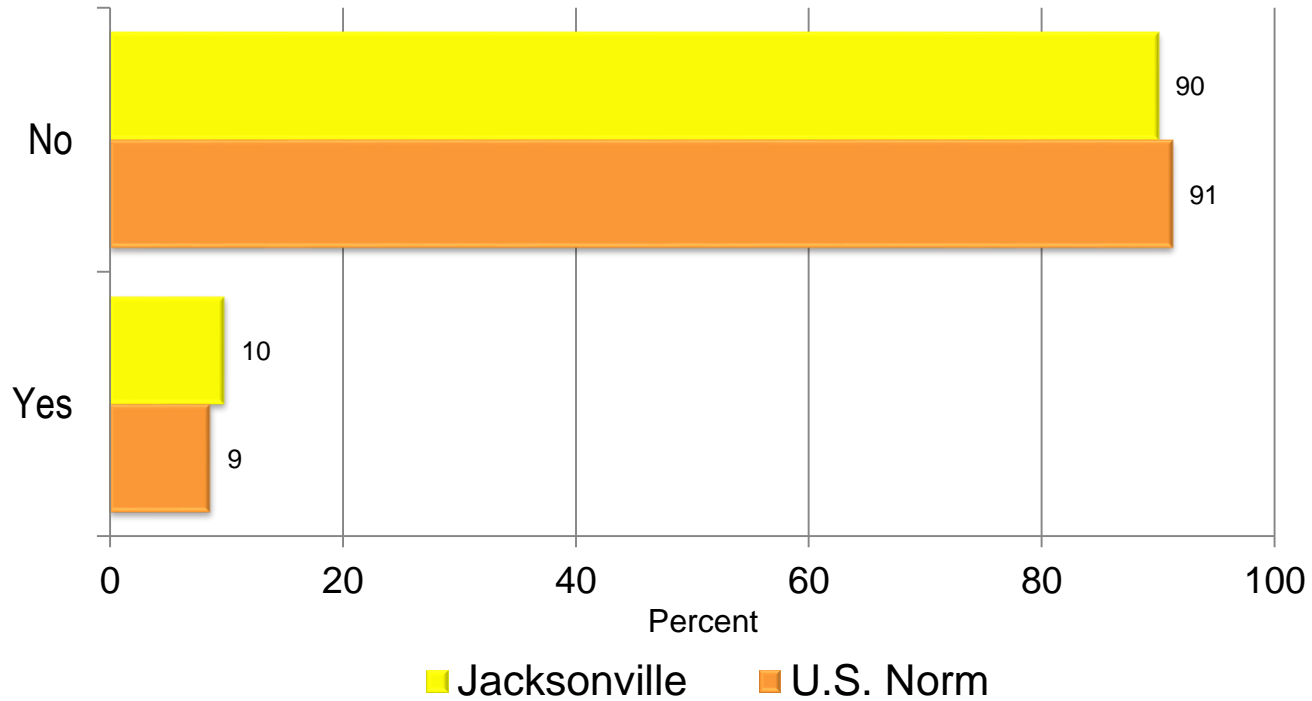
Base: Total Day Person-Trips



Hispanic Background



Base: Total Day Person-Trips





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:** 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