



Tampa Bay 2014 Visitor Report

Table of Contents



Introduction.....	3
Research Objectives.....	4
Methodology.....	5
Size & Structure of the U.S. Travel Market.....	6
Size & Structure of Tampa Bay’s Domestic Travel Market.....	10
Overnight Trip Detail.....	17
Overnight Expenditures.....	18
Overnight Trip Characteristics.....	23
Demographic Profile of Overnight Visitors.....	48
Day Trip Detail.....	59
Day Trip Expenditures.....	60
Day Trip Characteristics.....	65
Demographic Profile of Day Visitors.....	82
Appendix: Key Terms Defined.....	93

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 Tampa Bay's **domestic** tourism business in 2014.

Research Objectives



- The visitor research program is designed to provide:
 - *estimates of domestic overnight and day visitor volumes to Tampa Bay*
 - *a profile of Tampa Bay performance within its overnight travel market*
 - *Domestic visitor expenditures in Tampa Bay*
 - *a profile of Tampa Bay performance within its day travel market*

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 2014 travel year, this yielded :
 - 302,908 trips for analysis nationally:
 - 206,720 overnight trips
 - 96,188 day trips
- For Tampa Bay, the following sample was achieved in 2014:
 - 3,140 trips:
 - 2,308 overnight trips
 - 838 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

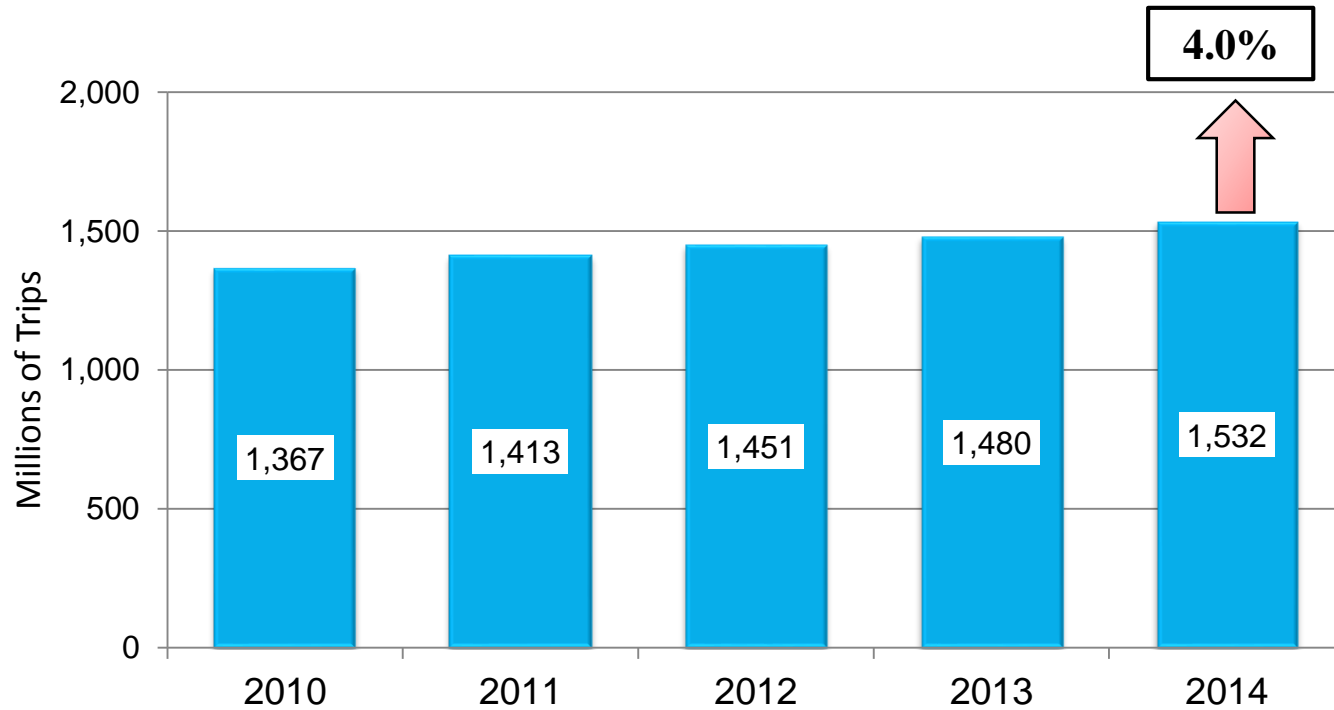


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2010-2014



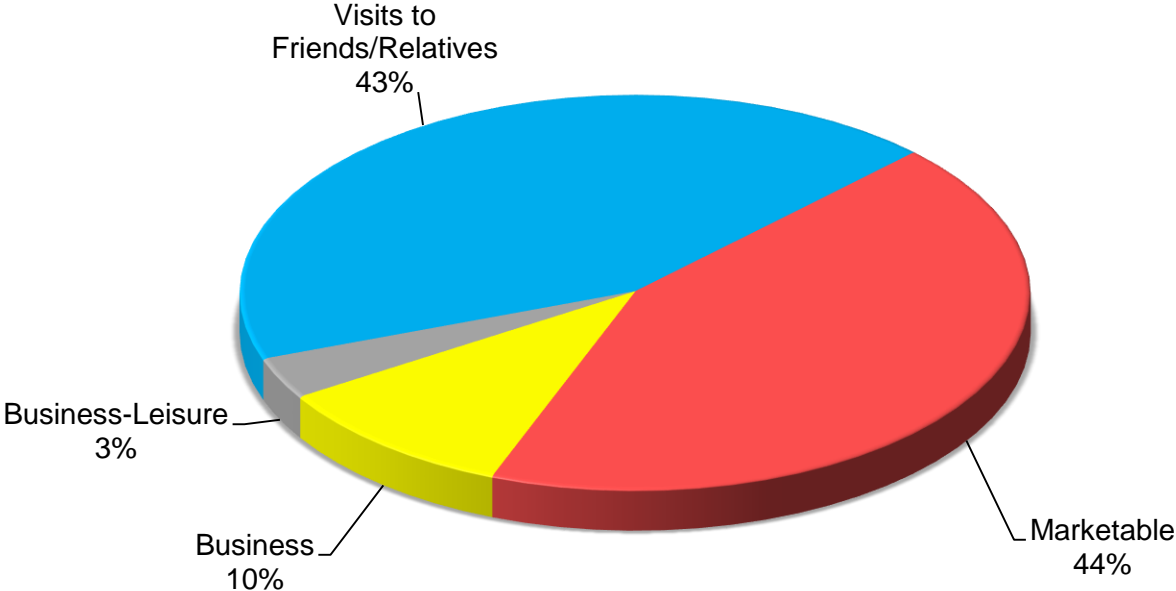
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2014 Overnight Trips



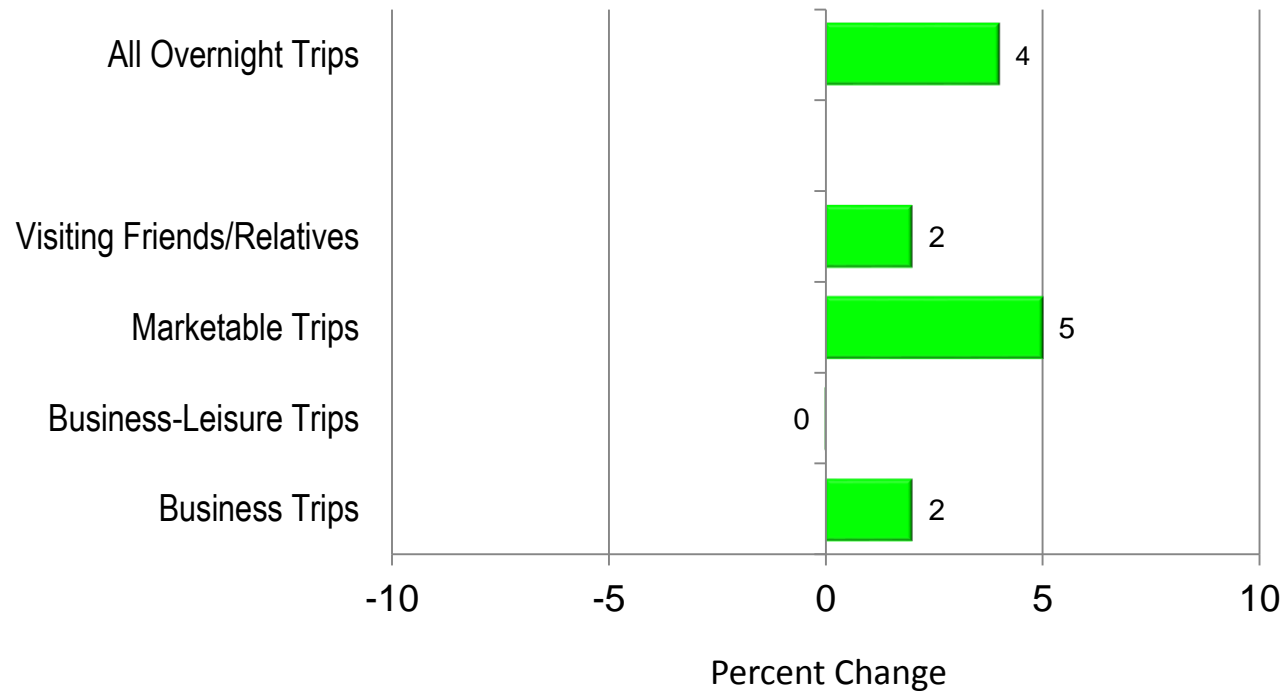
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips – 2014 vs. 2013



Base: Total Overnight Person-Trips



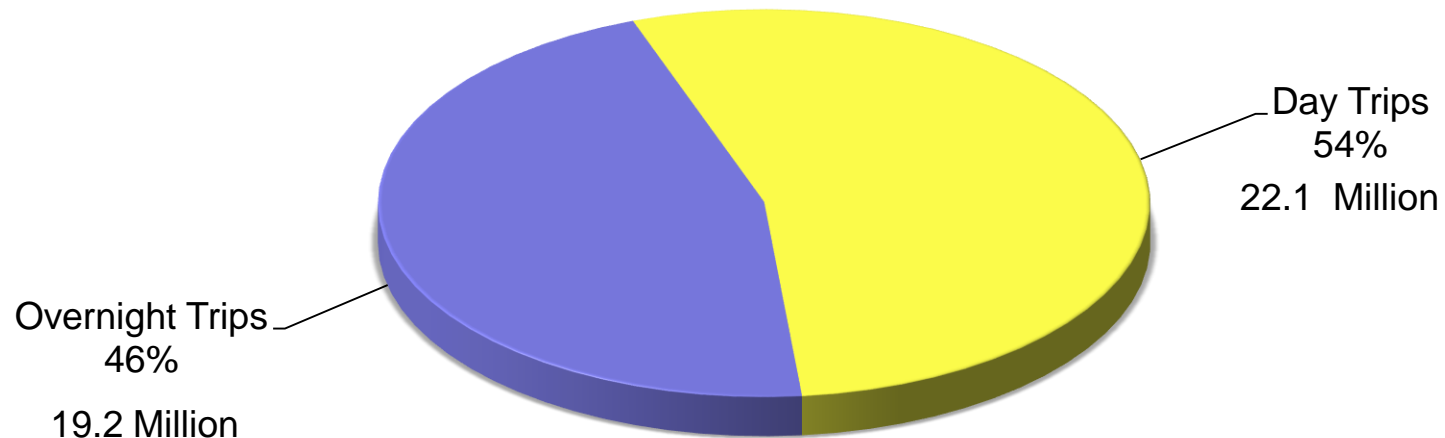


Size & Structure of Tampa Bay's Domestic Travel Market

Total Size of Tampa Bay's Domestic Travel Market in 2014



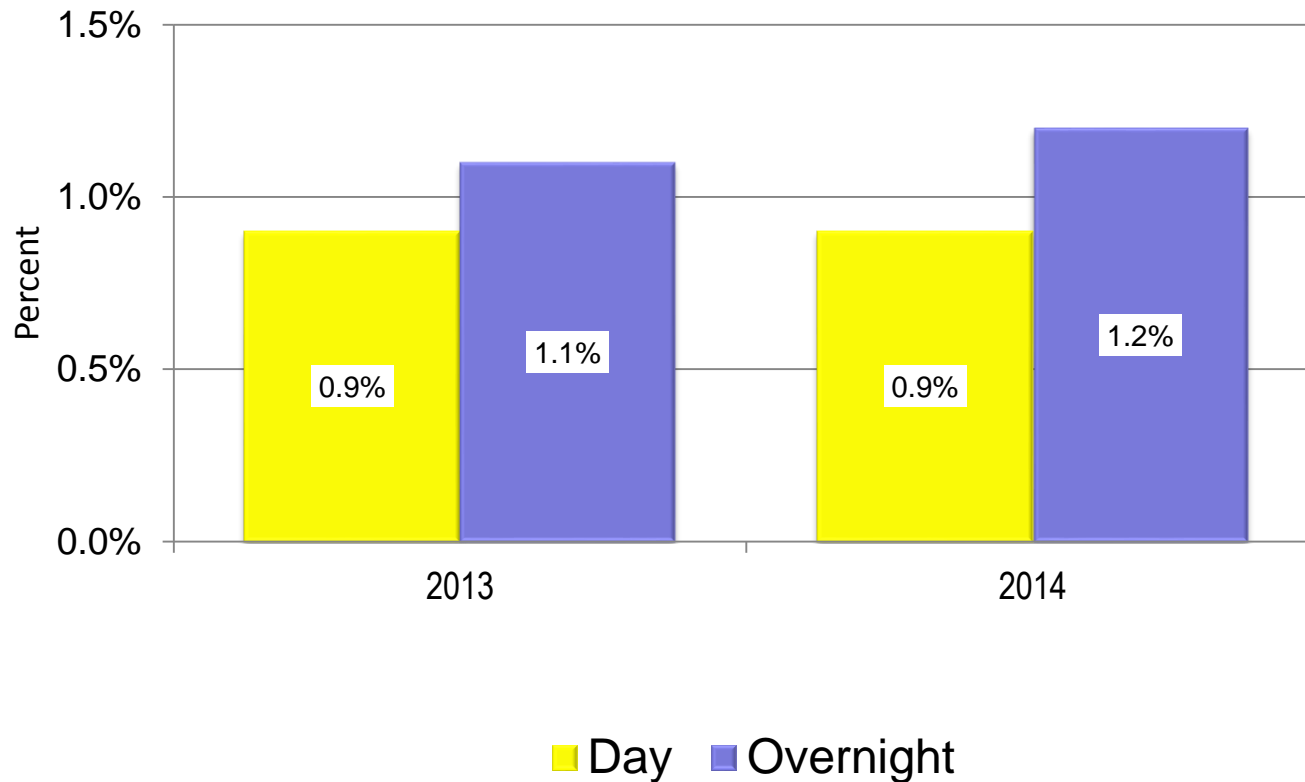
Total Person-Trips = 41.3 Million



Tampa Bay's Share of Domestic Trips



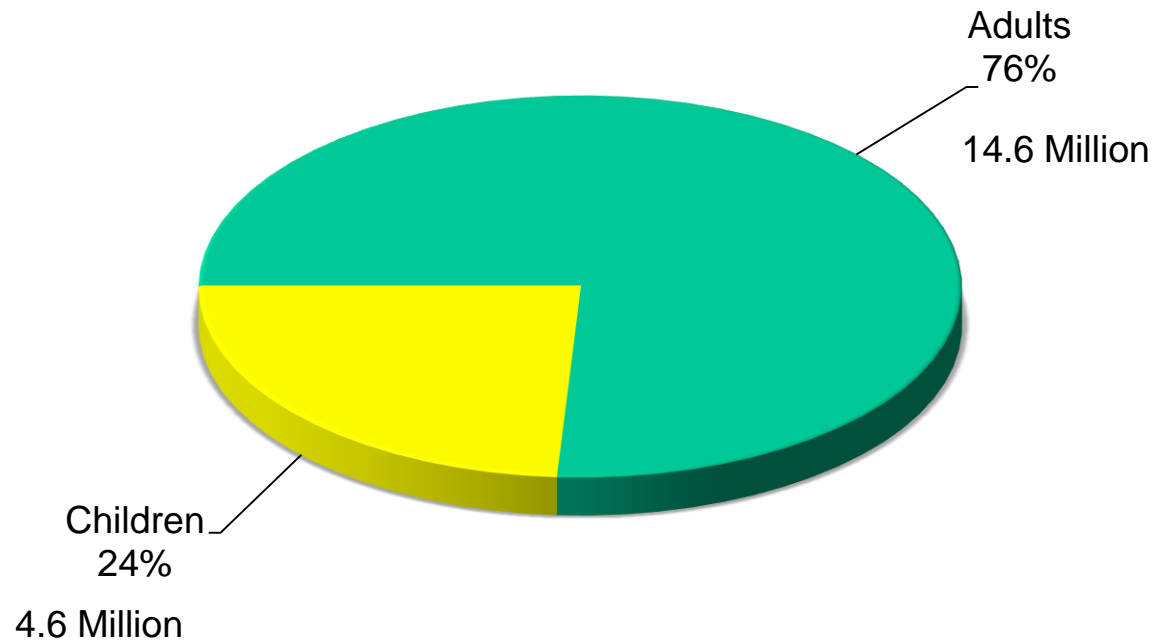
Base: Total Person-Trips



Size of Tampa Bay's Overnight Travel Market – Adults vs. Children



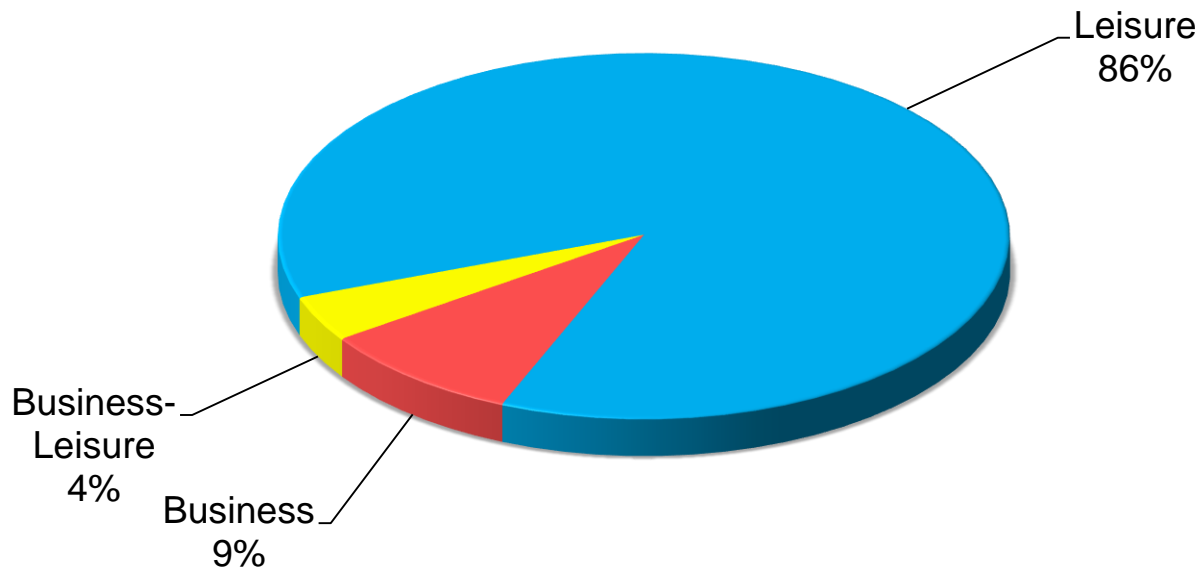
Total Overnight Person-Trips = 19.2 Million



Tampa Bay's Overnight Travel Market — by Main Trip Purpose



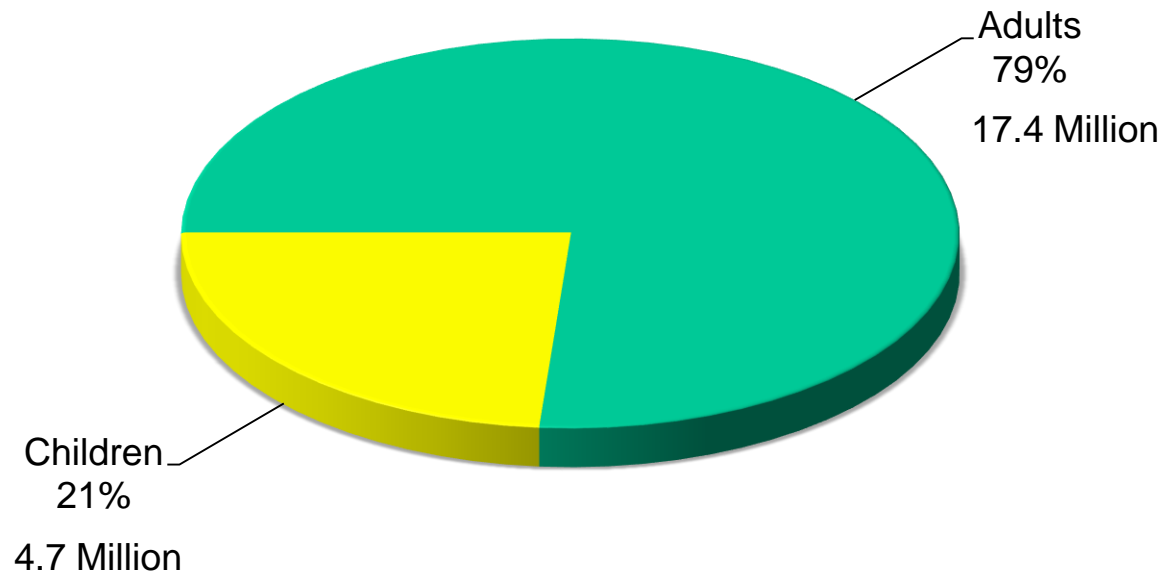
Adult Overnight Person-Trips = 14.6 Million



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



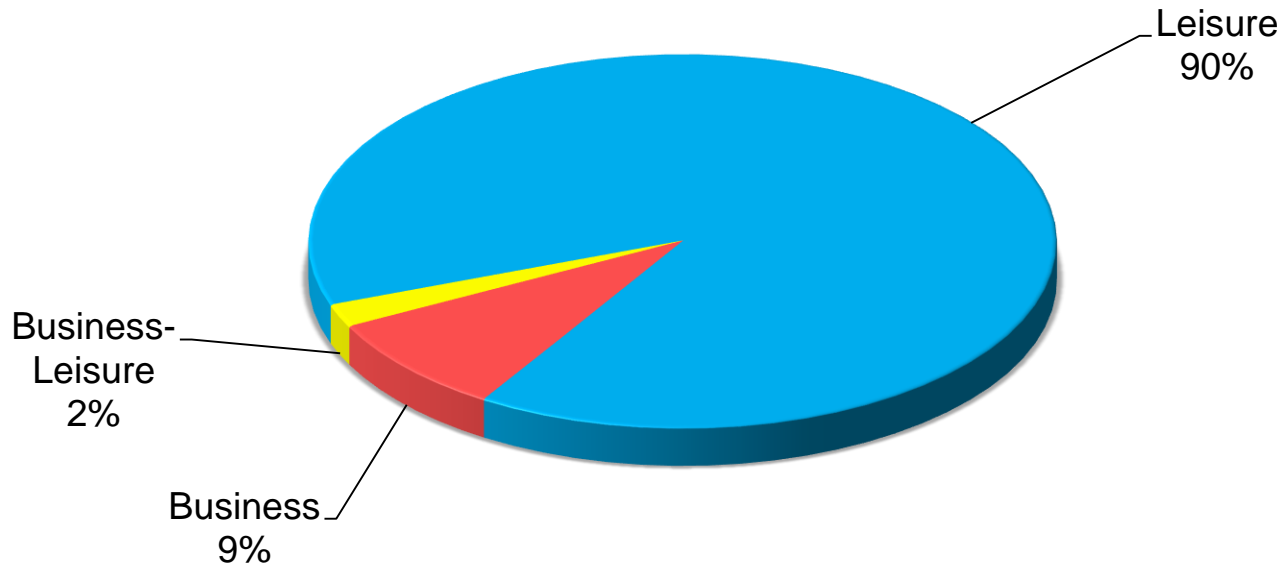
Total Day Person-Trips = 22.1 Million



Tampa Bay's Day Travel Market — by Trip Purpose



Adult Day Person-Trips = 17.4 Million





Overnight Trip Detail

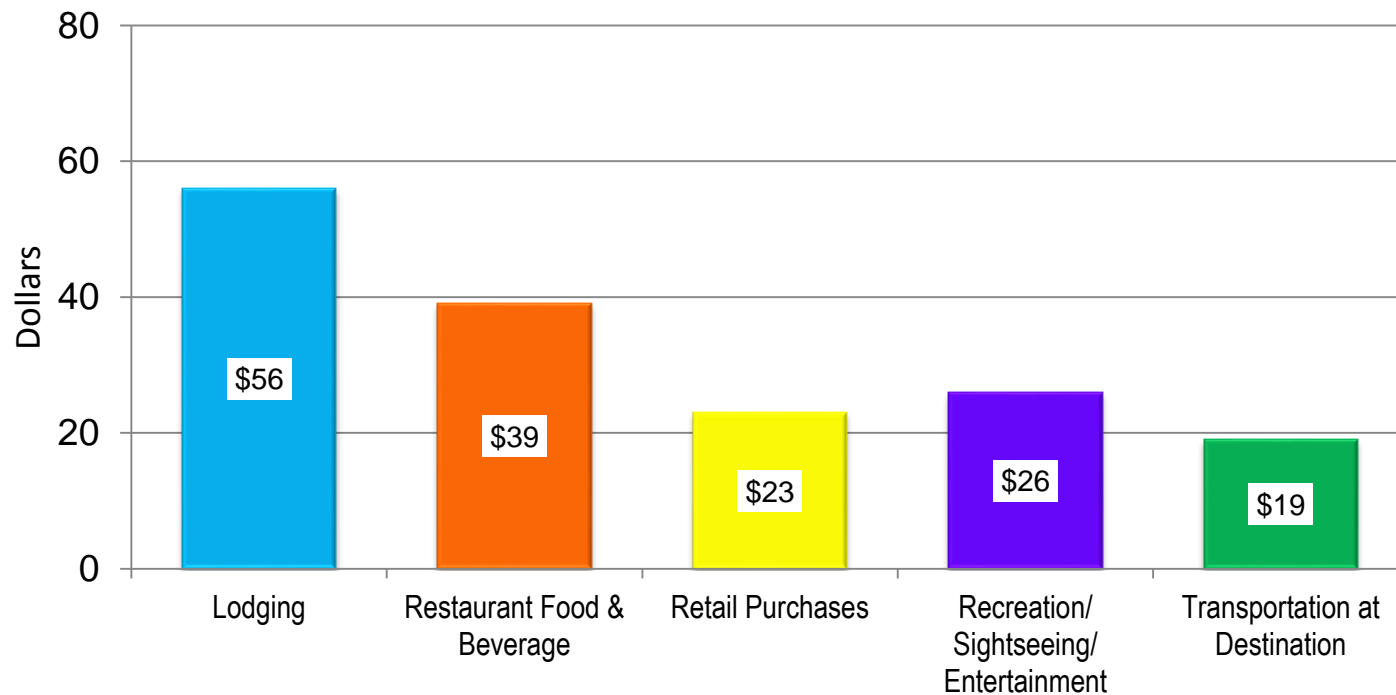


Overnight Expenditures

Average Per Person Expenditures on Domestic Overnight Trips – By Sector



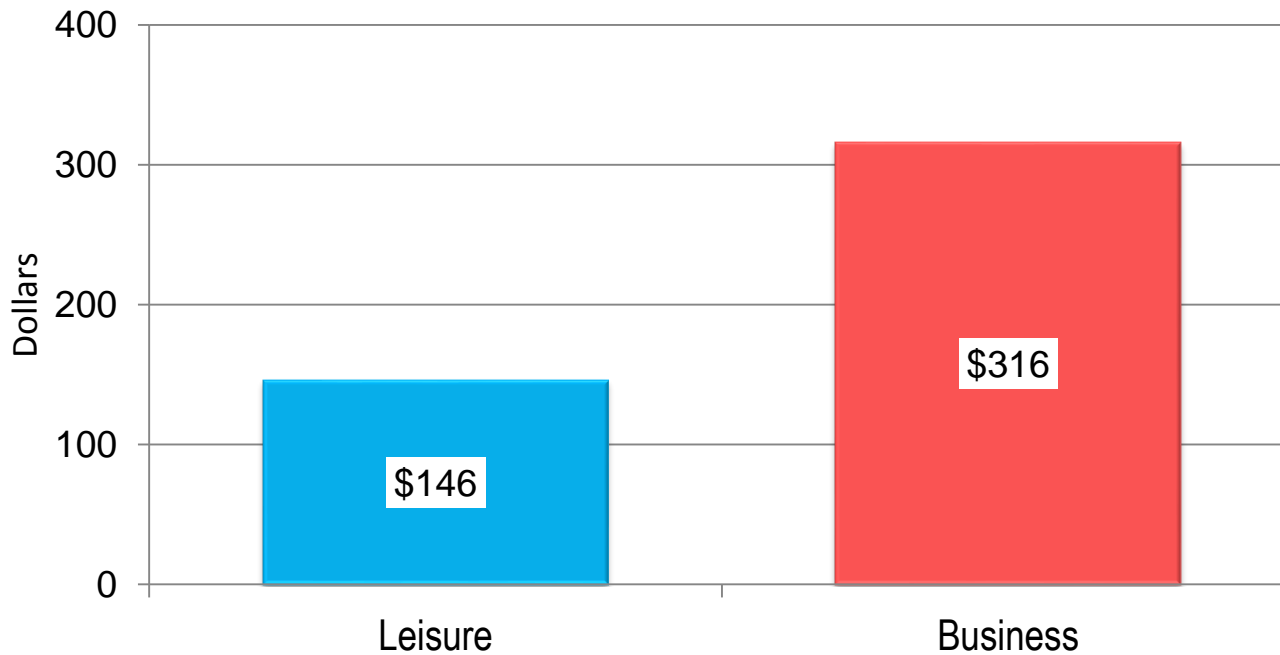
Base: Total Overnight Person-Trips to Tampa Bay



Average Per Person Expenditures on Domestic Overnight – by Trip Purpose



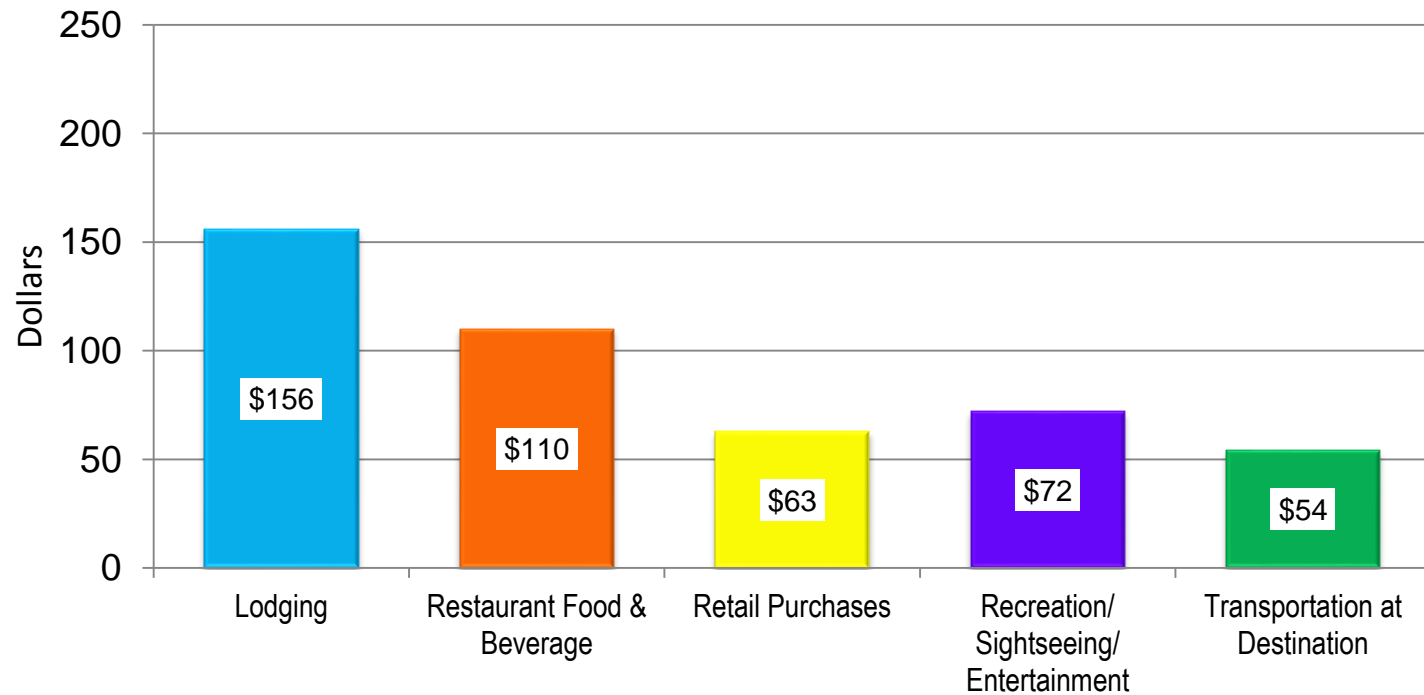
Base: Total Overnight Person-Trips to Tampa Bay



Average Per Party Expenditures on Domestic Overnight Trips – By Sector



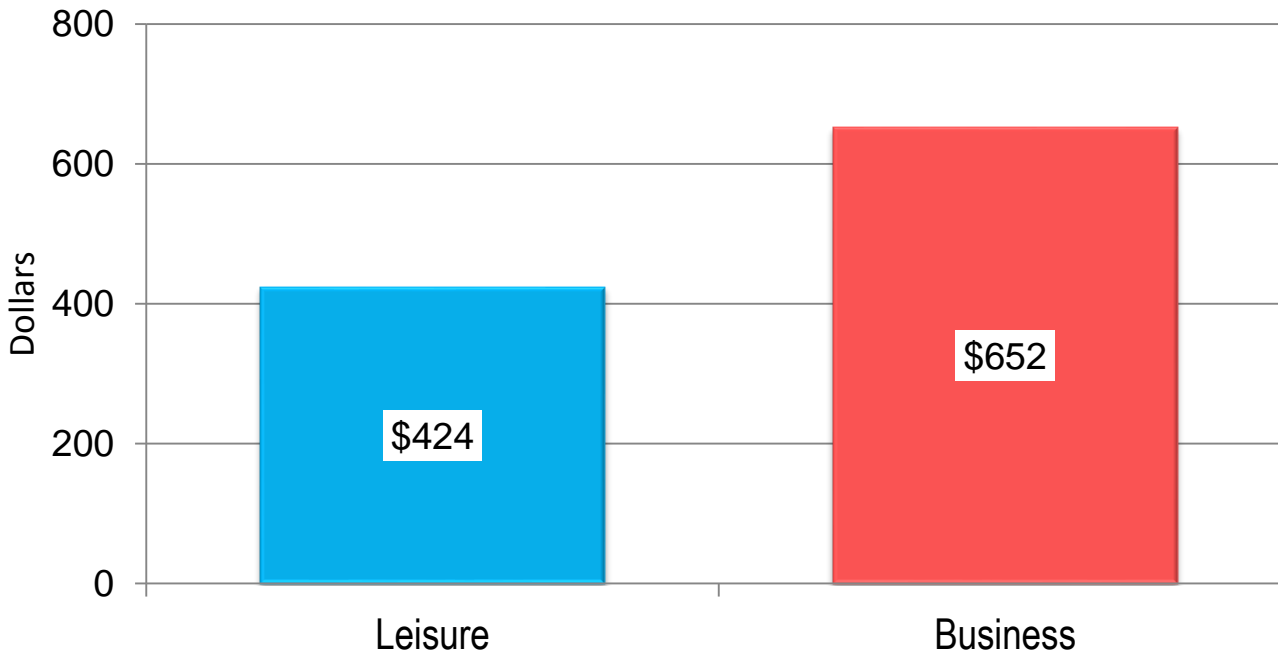
Base: Total Overnight Person-Trips to Tampa Bay



Average Per Party Expenditures on Domestic Overnight – by Trip Purpose



Base: Total Overnight Person-Trips to Tampa Bay



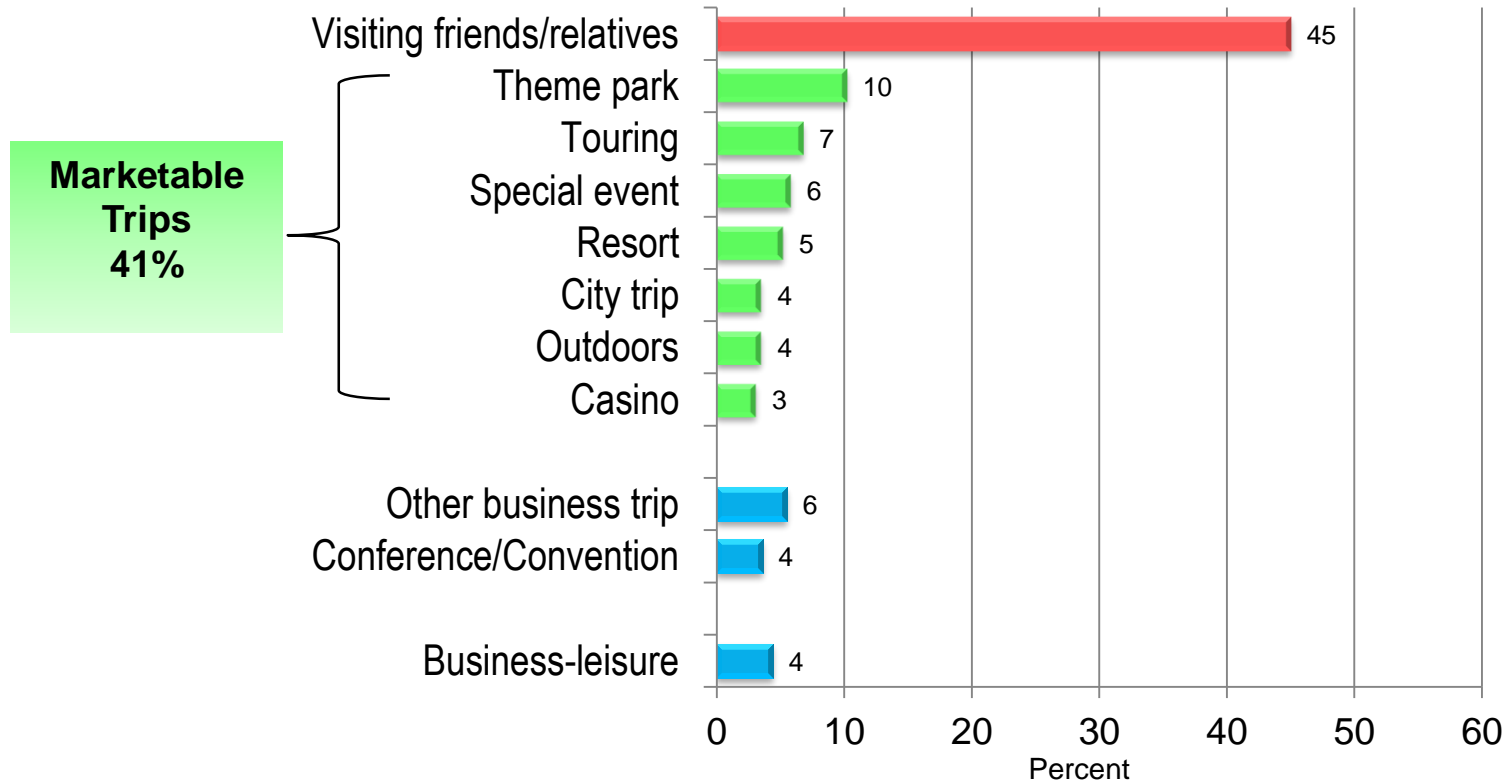


Overnight Trip Characteristics

Main Purpose of Trip



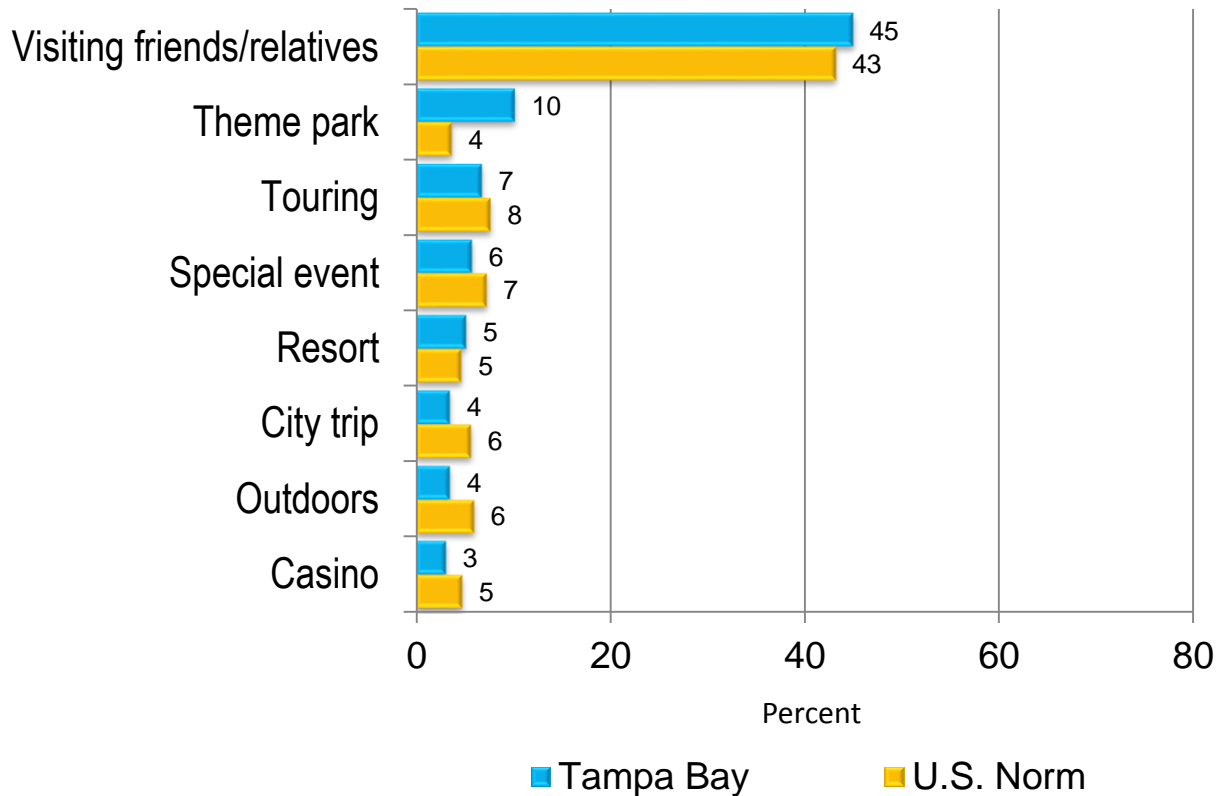
Base: Total Overnight Person-Trips to Tampa Bay



Main Purpose of Leisure Trip — Tampa Bay vs. National Norm



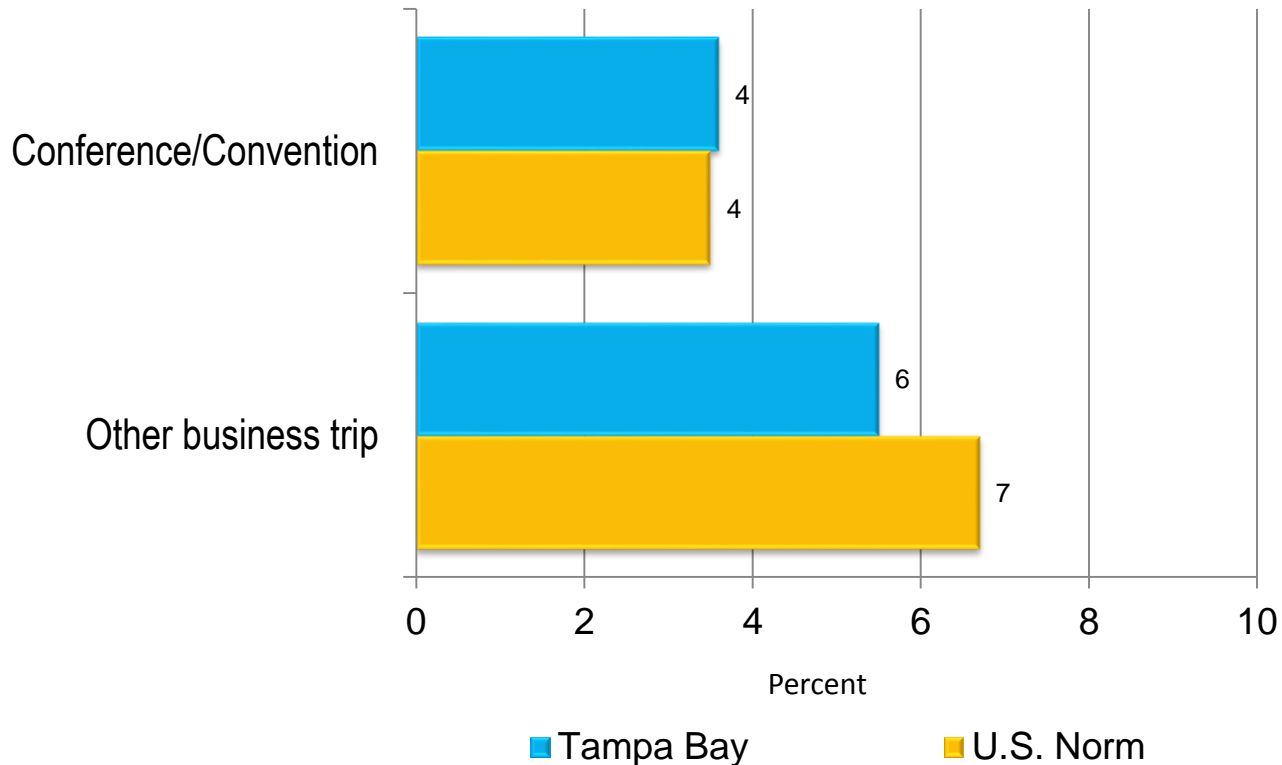
Base: Total Overnight Person-Trips



Main Purpose of Business Trip – Tampa Bay vs. National Norm



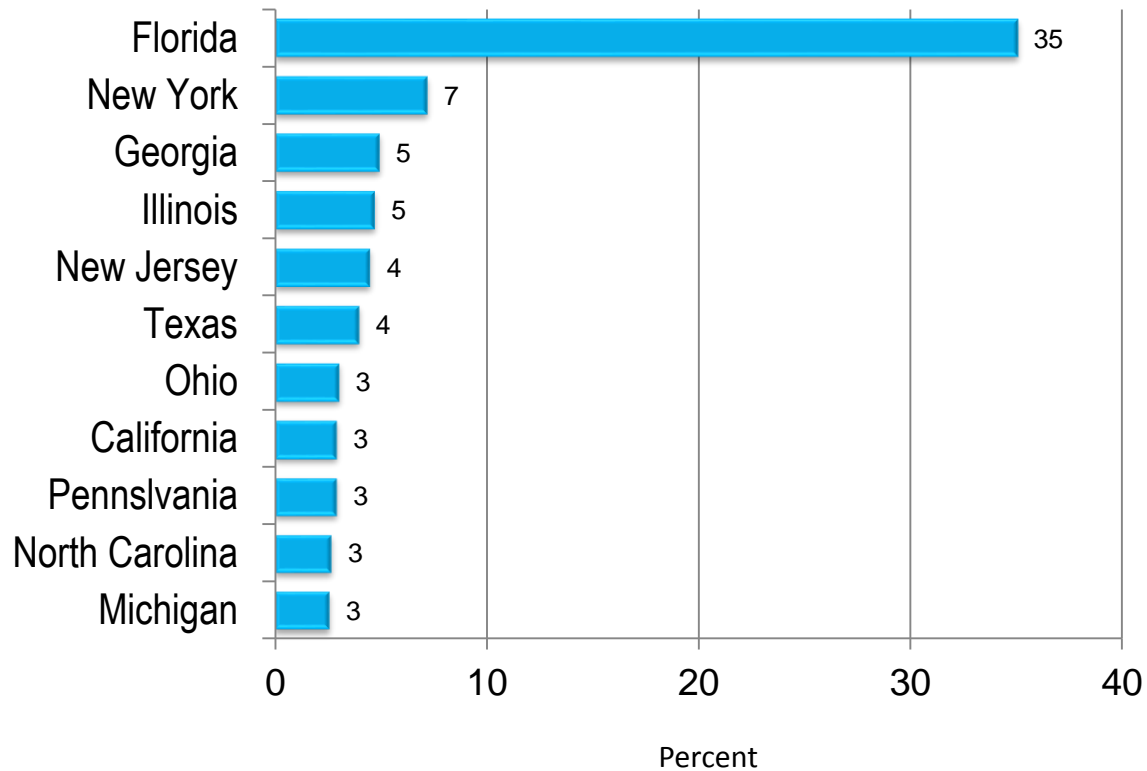
Base: Total Overnight Person-Trips



State Origin Of Trip



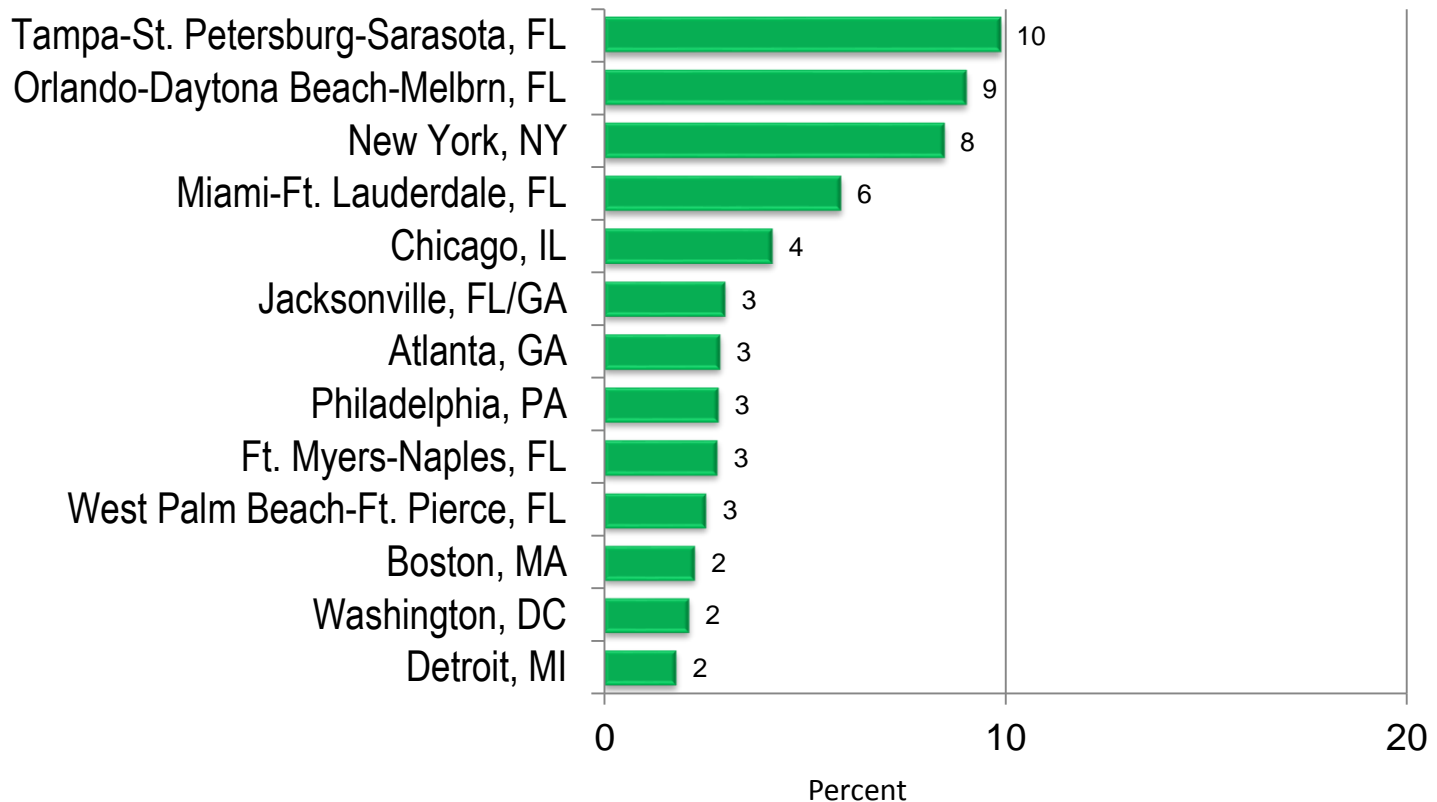
Base: Total Overnight Person-Trips to Tampa Bay



DMA Origin Of Trip



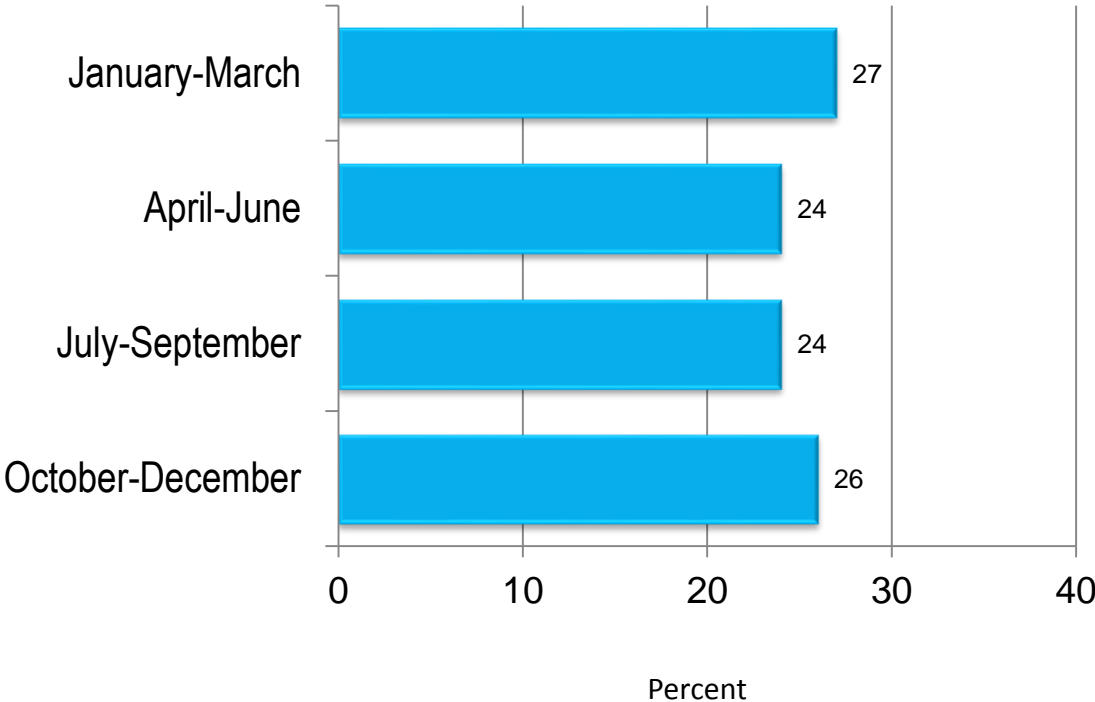
Base: Total Overnight Person-Trips to Tampa Bay



Season of Trip



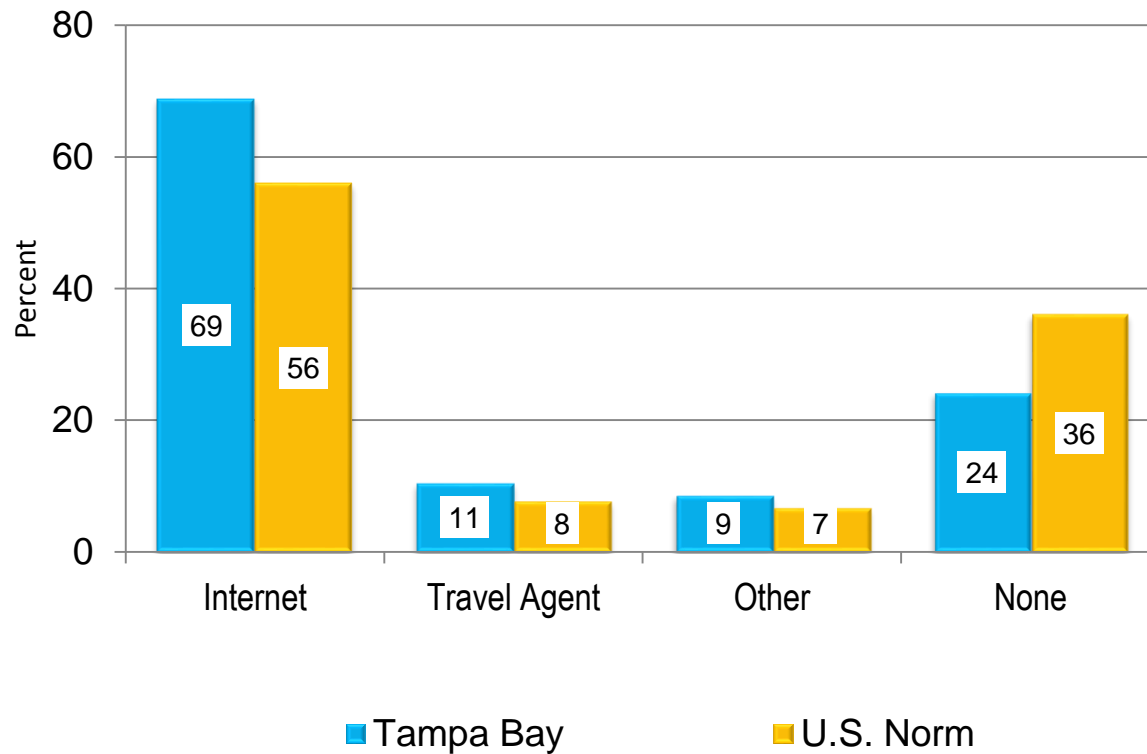
Base: Total Overnight Person-Trips to Tampa Bay



Method of Planning Trip



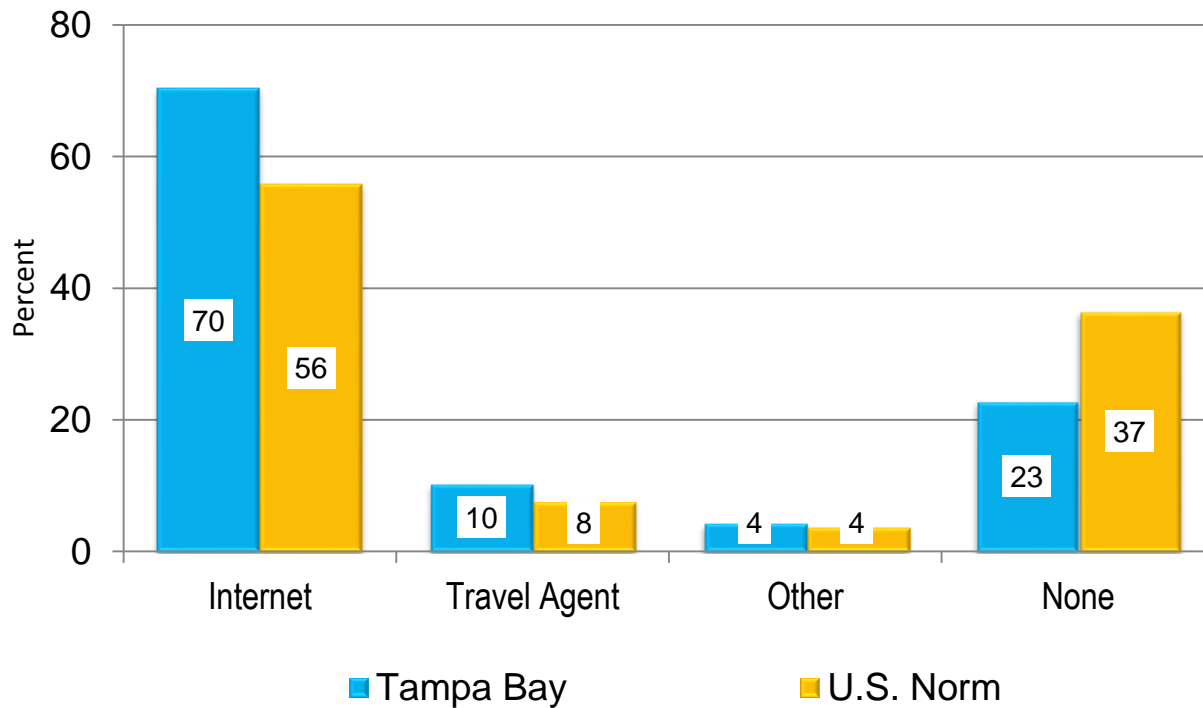
Base: Total Overnight Person-Trips



Method of Booking Trip



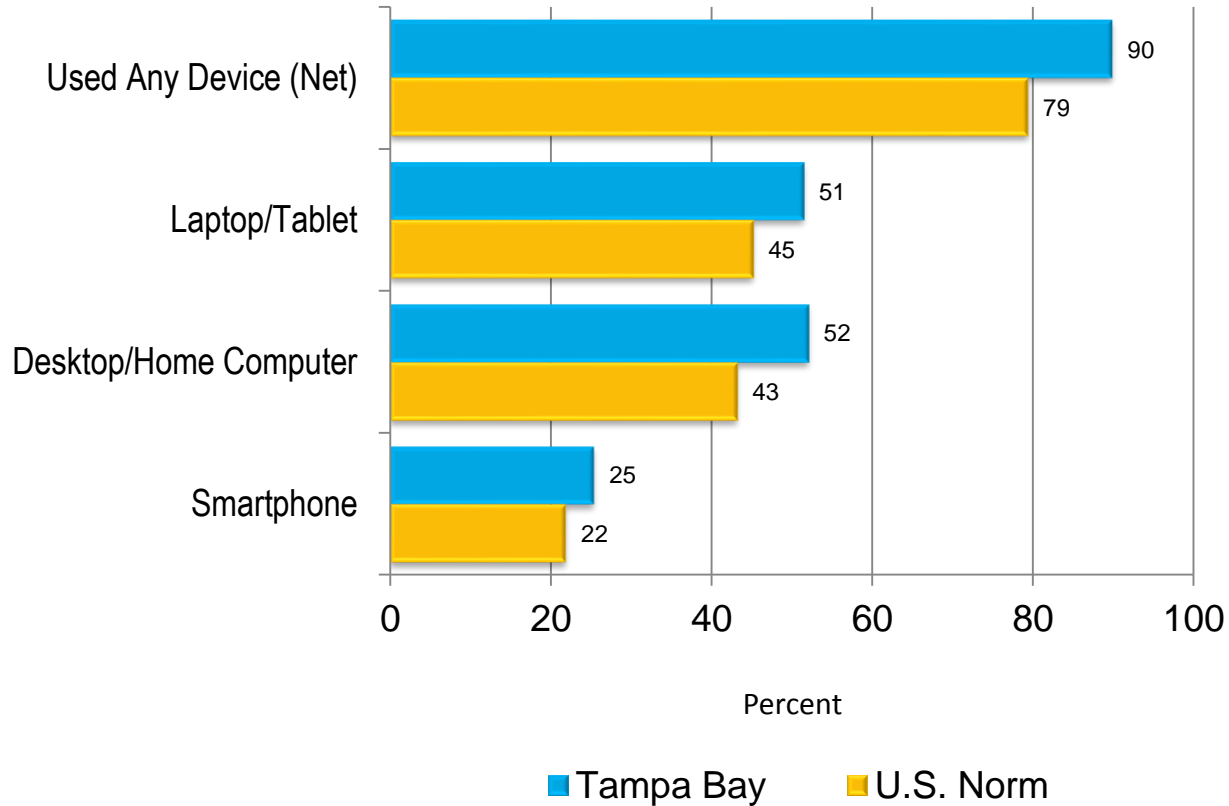
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



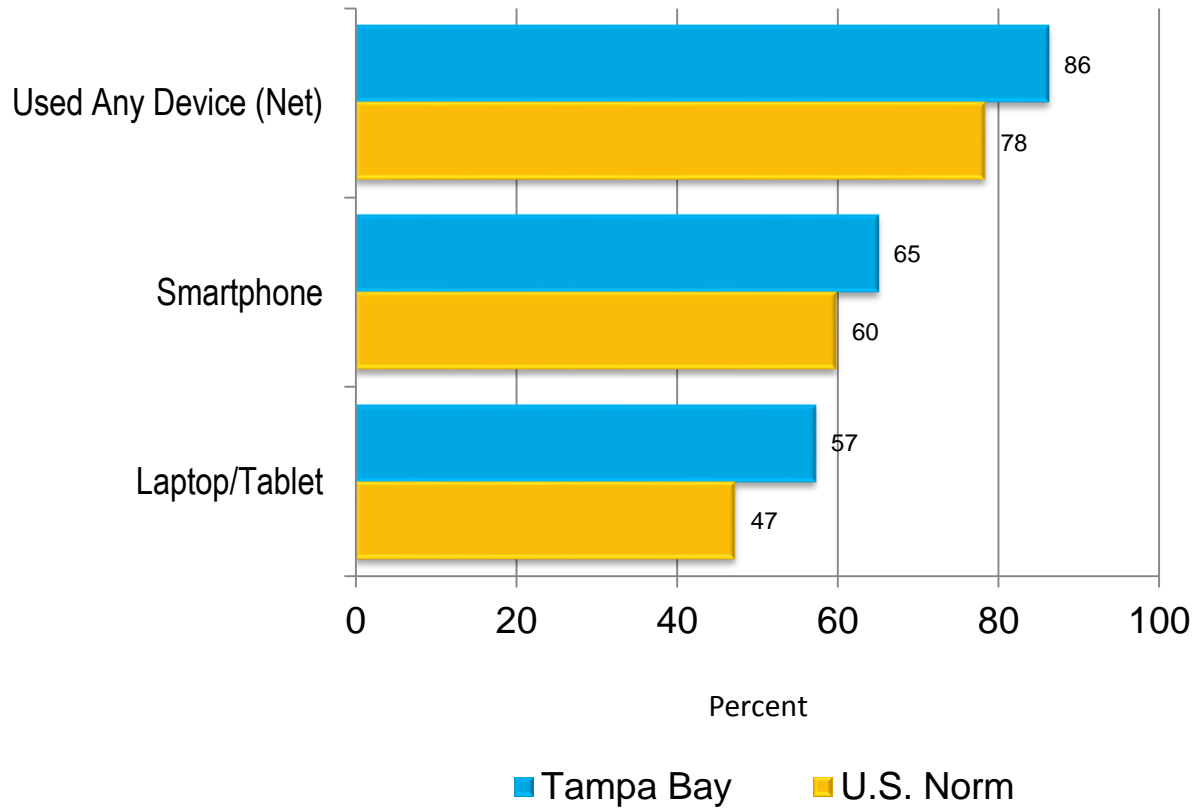
Base: Total Overnight Person-Trips



Devices Used During Trip



Base: Total Overnight Person-Trips



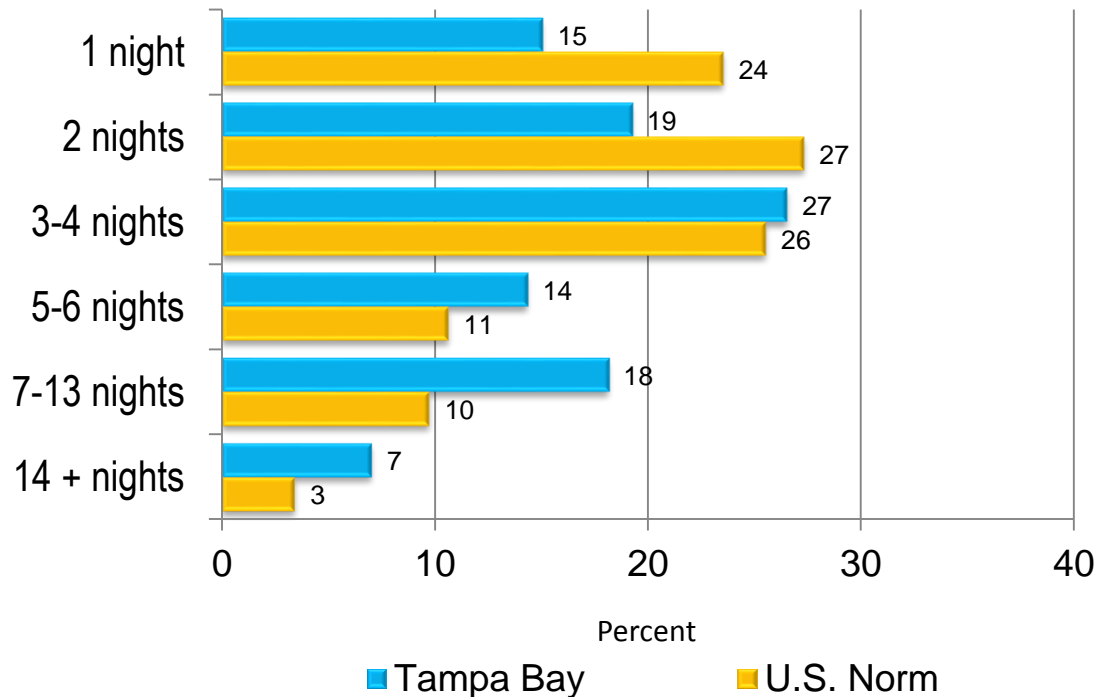
Total Nights Away on Trip



Base: Total Overnight Person-Trips

**Average
Tampa Bay
= 5.2 nights**

**Average
US Norm
= 3.7 nights**

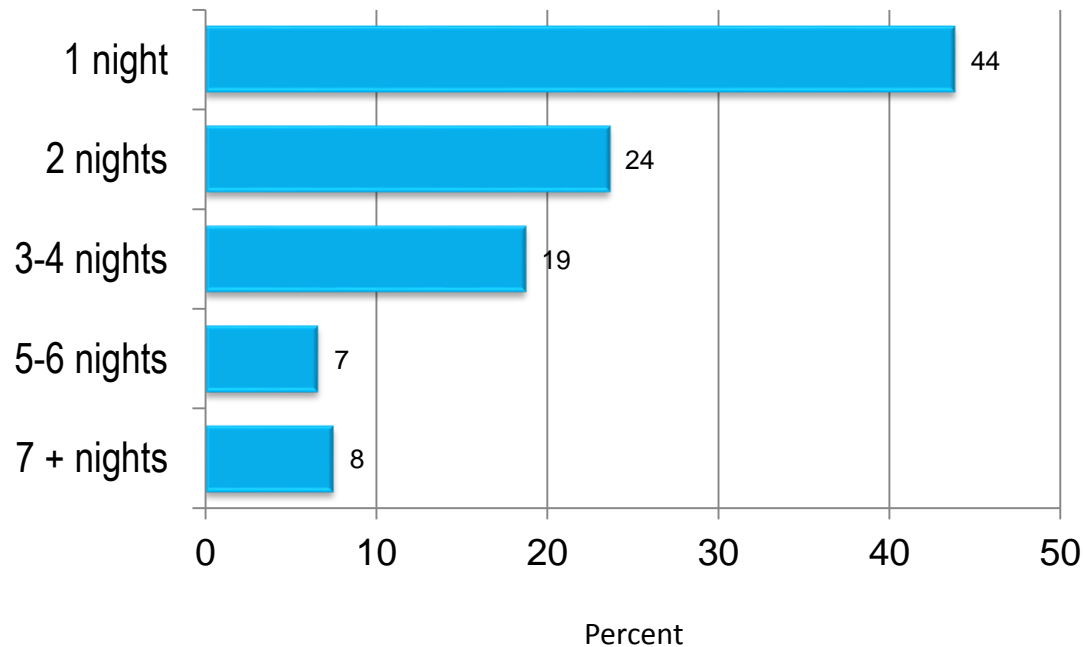


Number of Nights Spent in Tampa Bay



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

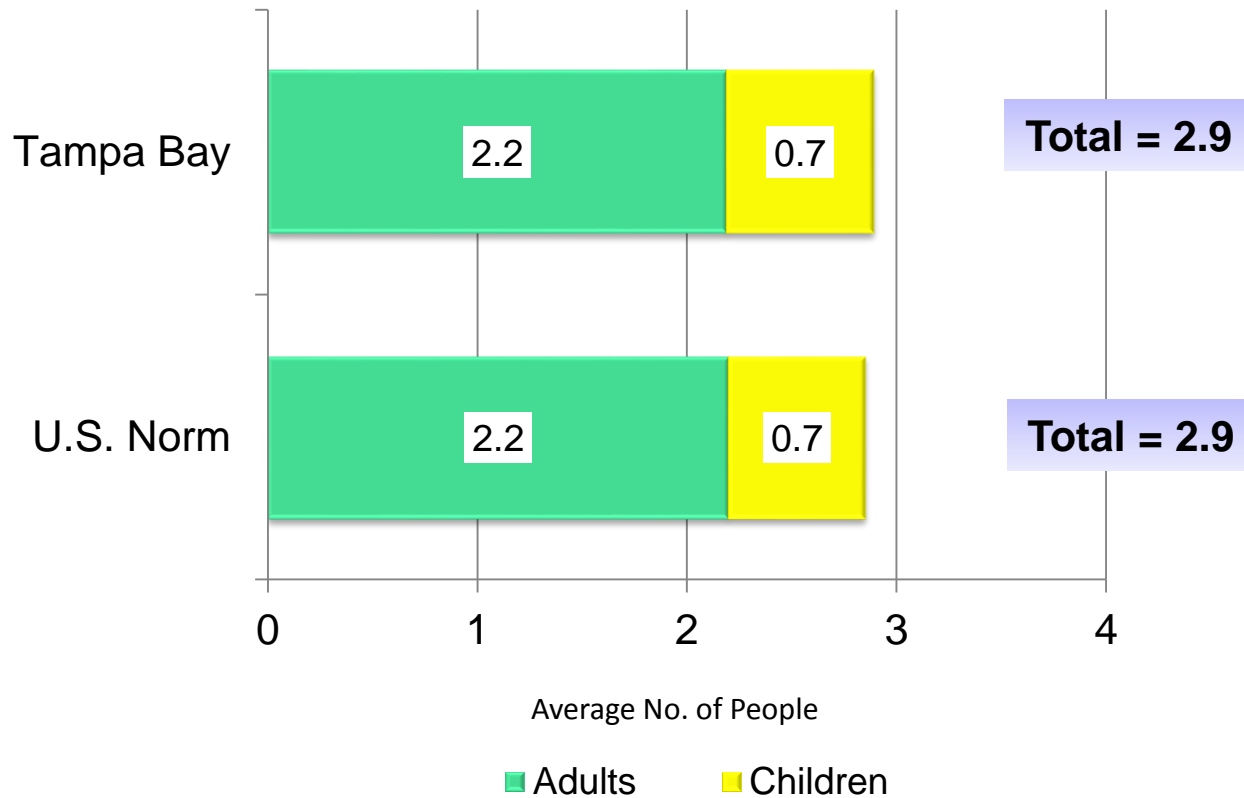
Average Nights Spent in Tampa Bay = 2.6



Size of Travel Party



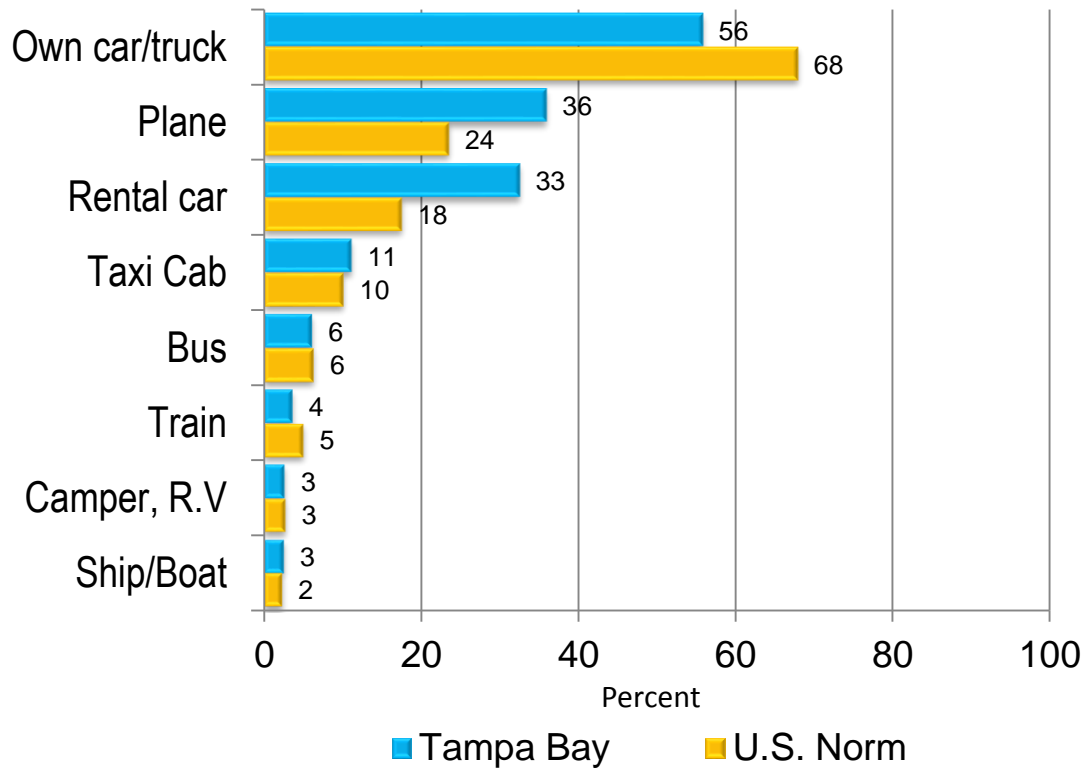
Base: Total Overnight Person-Trips



Transportation



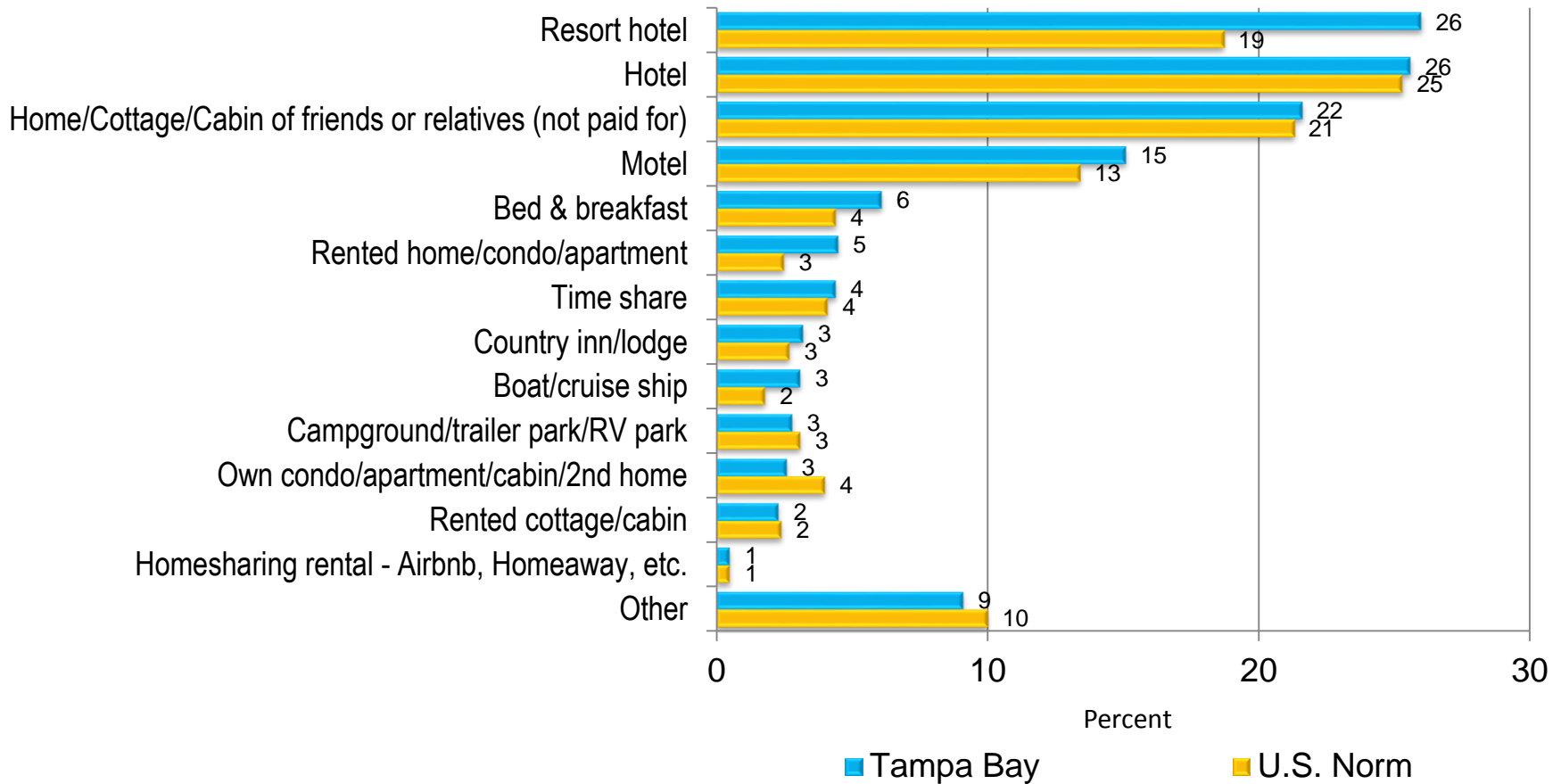
Base: Total Overnight Person-Trips



Accommodations



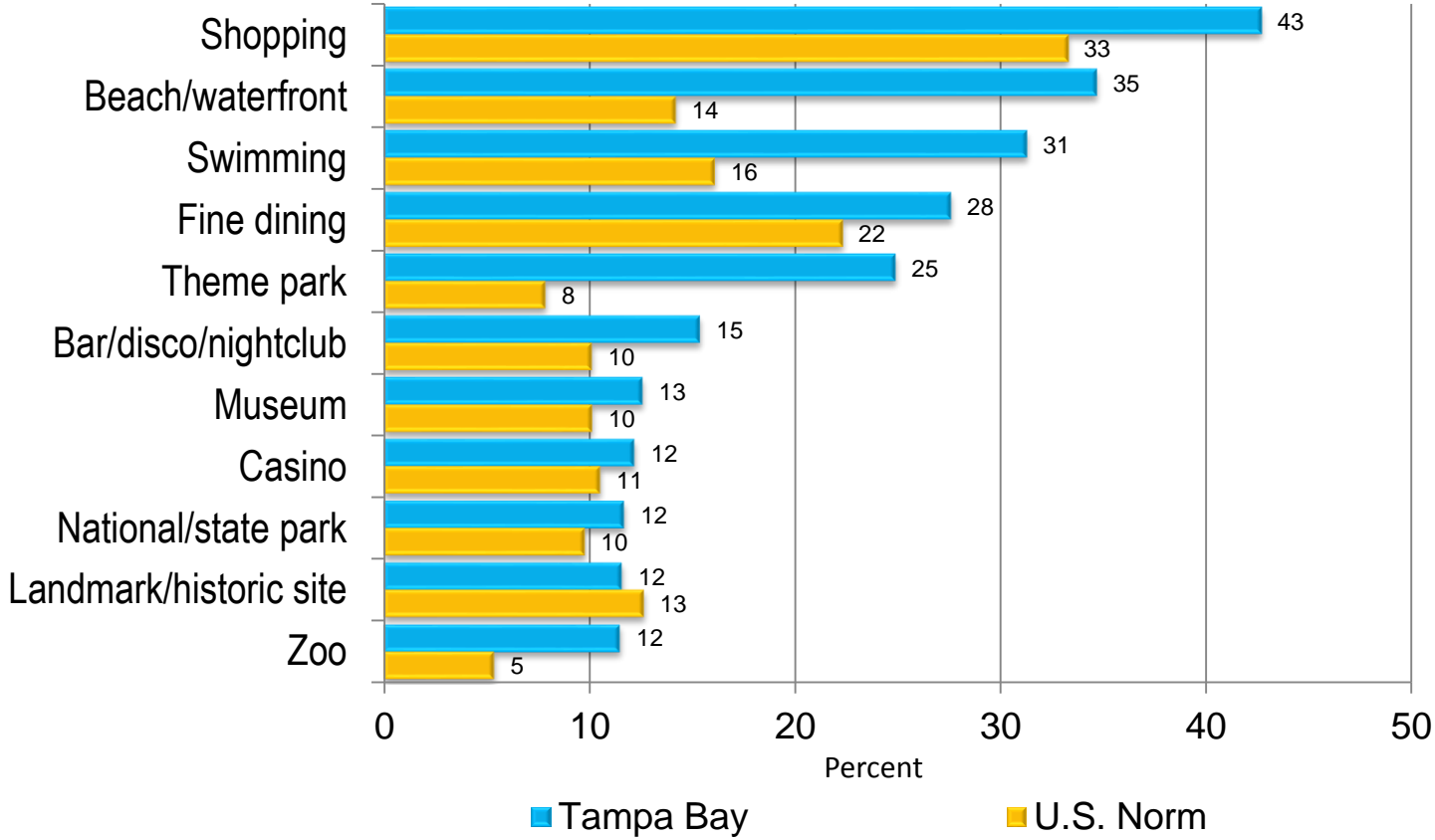
Base: Total Overnight Person-Trips



Activities and Experiences



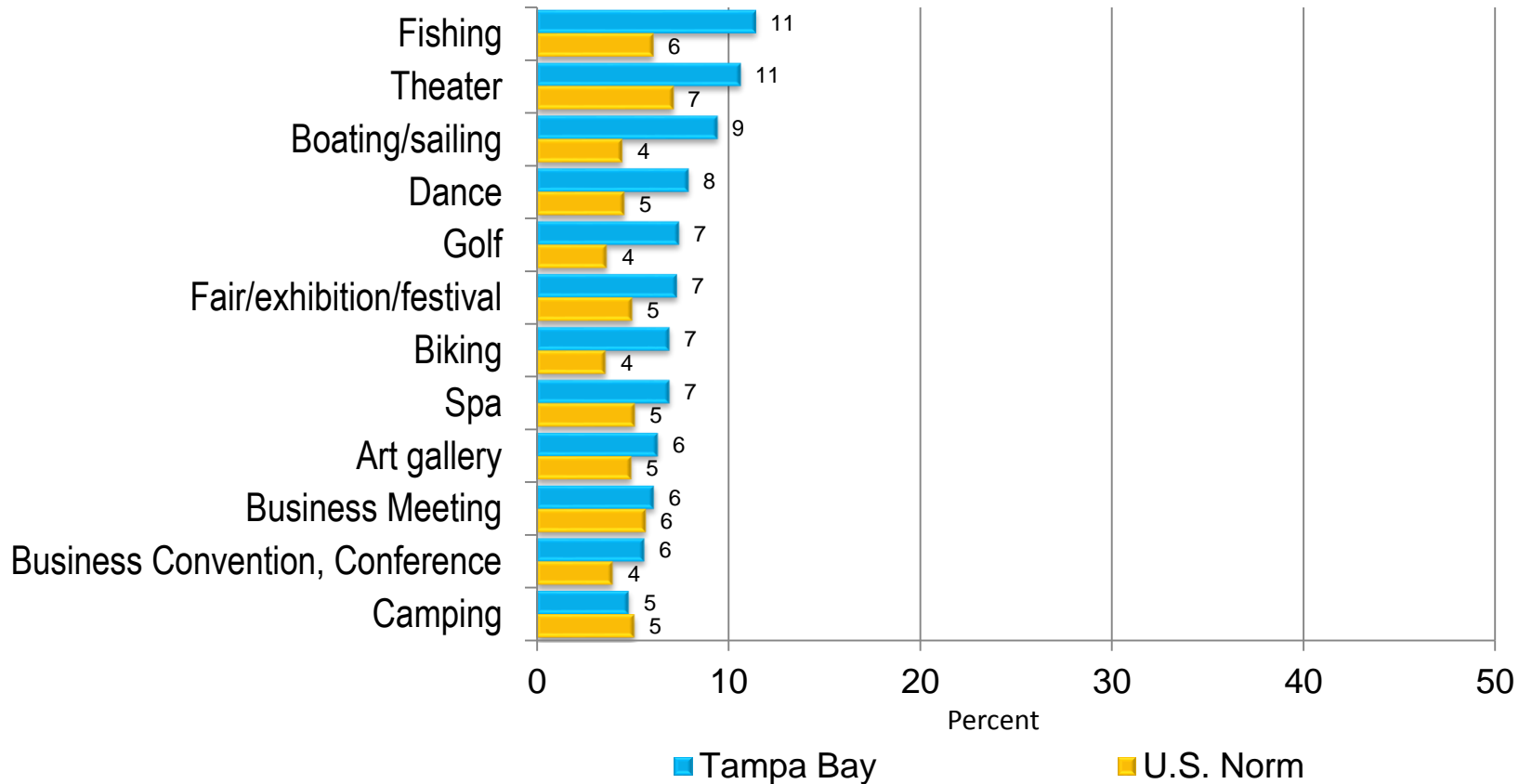
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



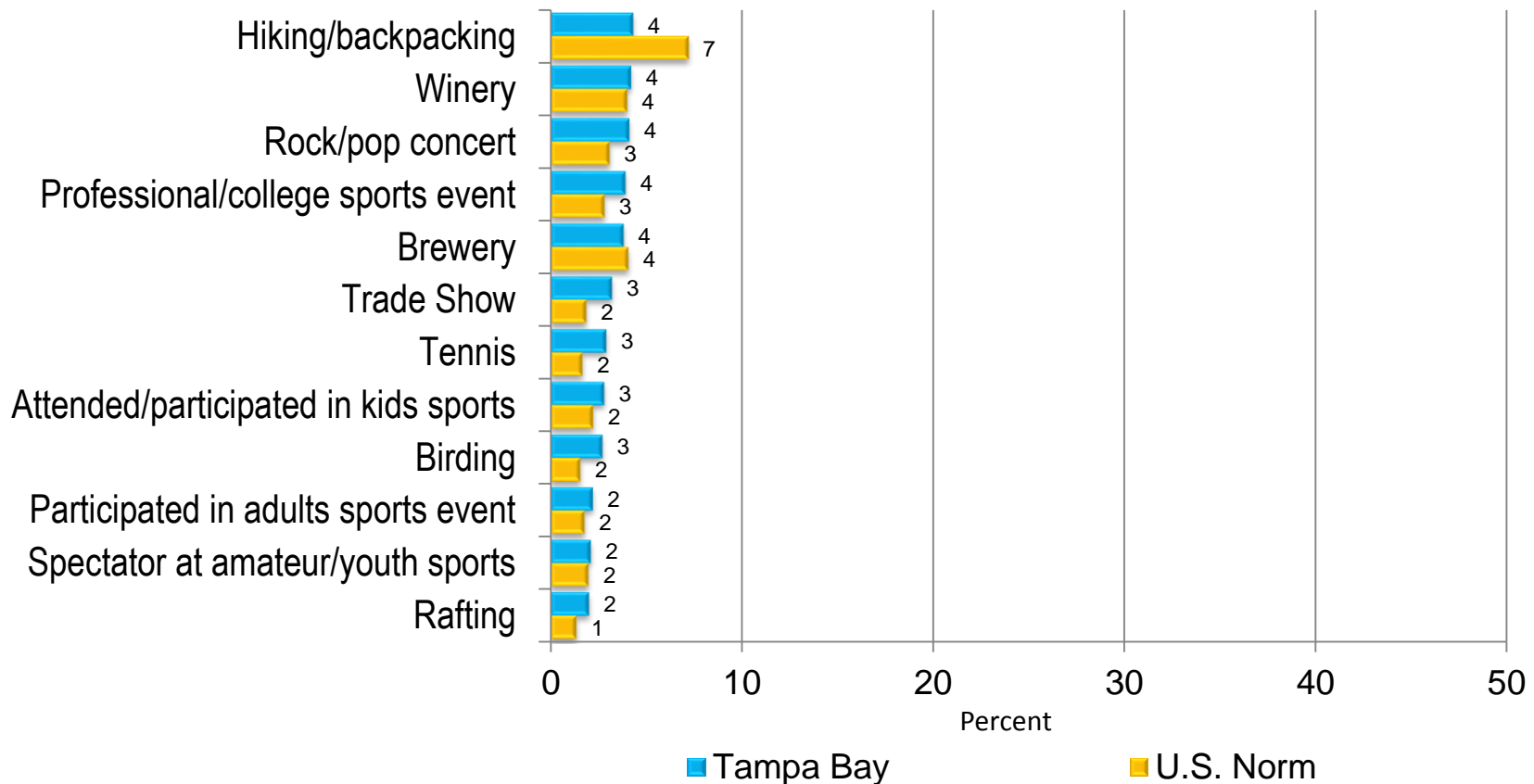
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



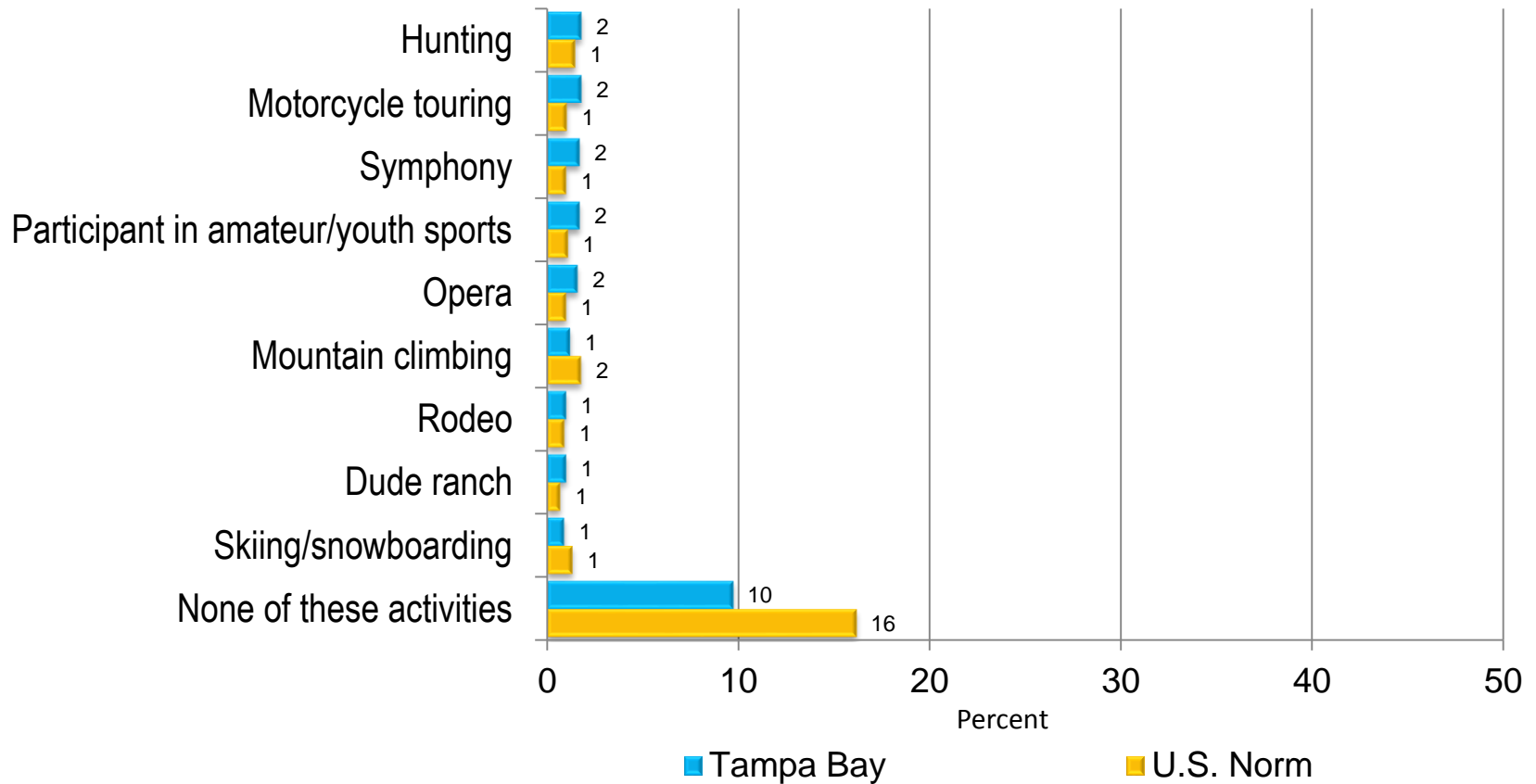
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



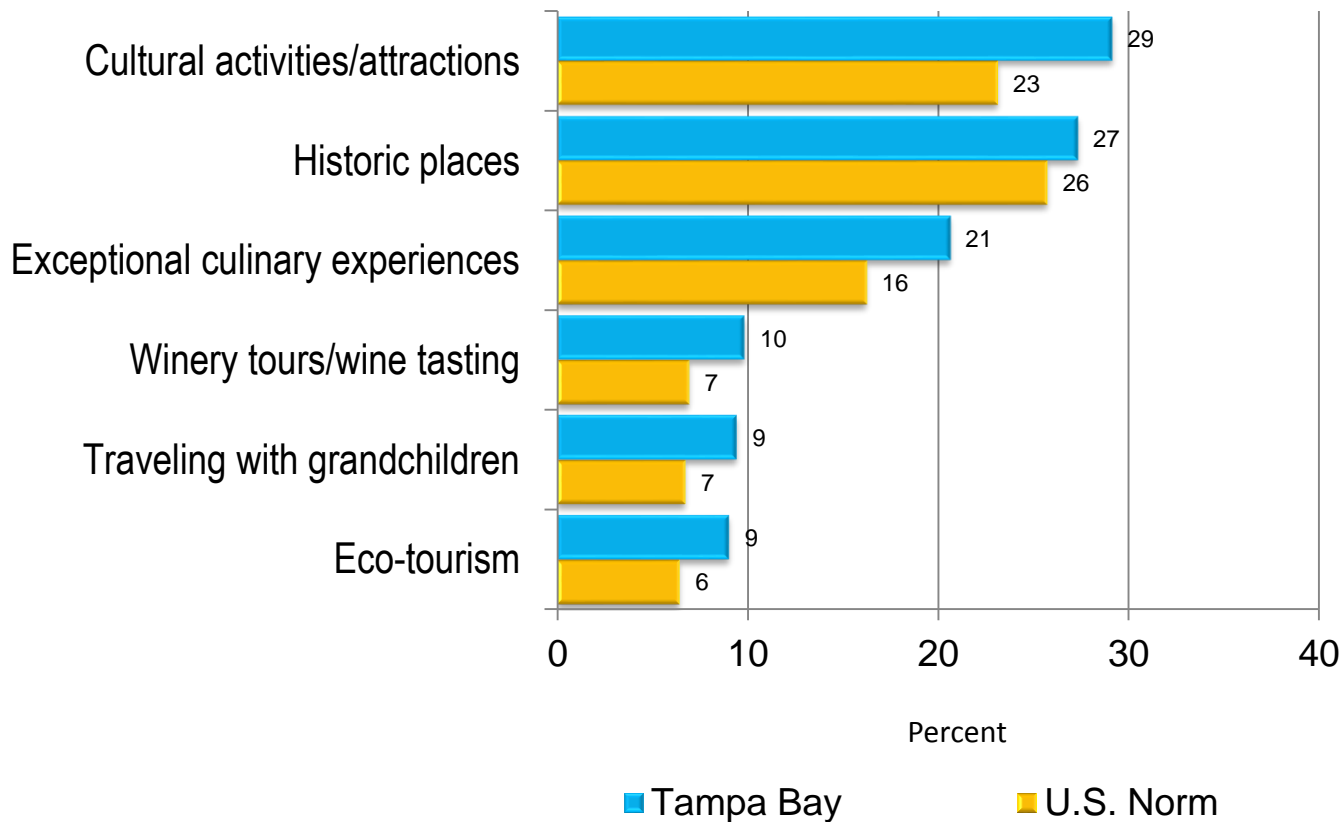
Base: Total Overnight Person-Trips



Activities of Special Interest



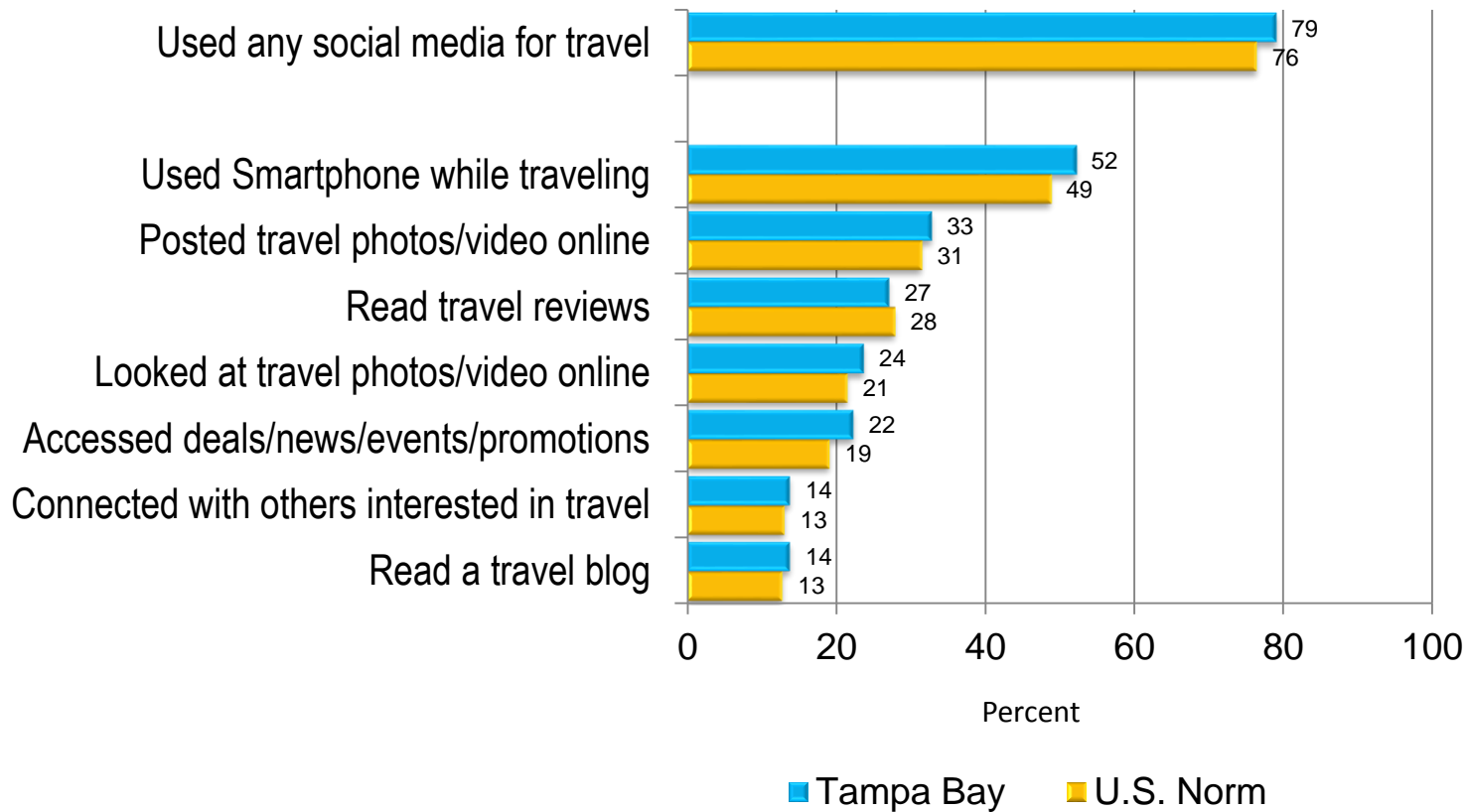
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



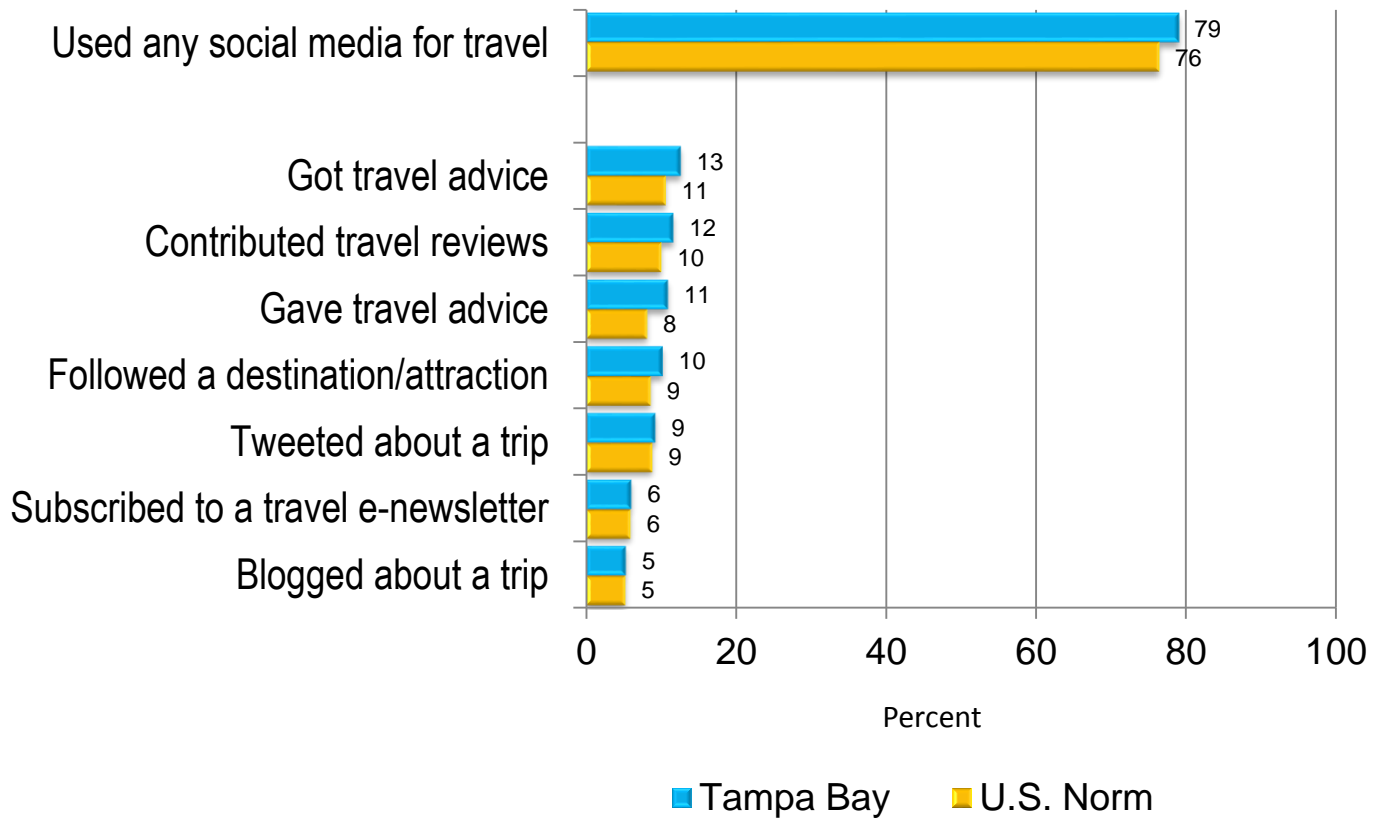
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers (Cont'd)



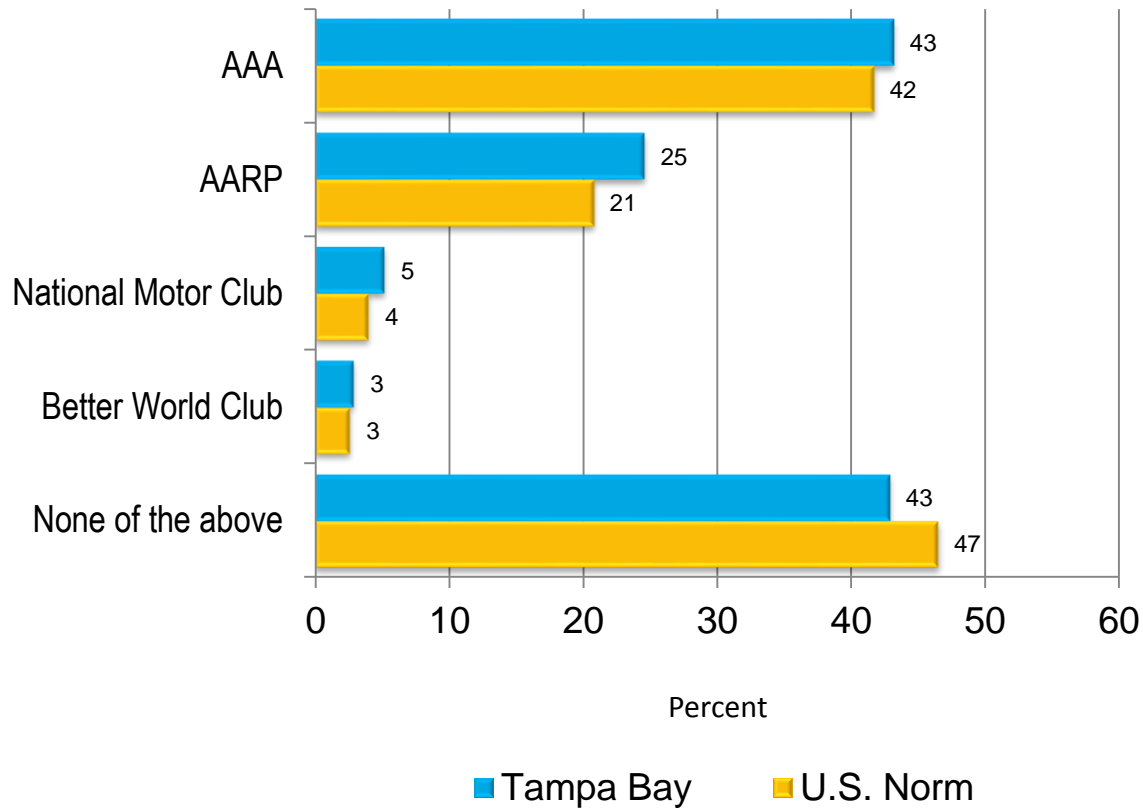
Base: Total Overnight Person-Trips



Club Membership



Base: Total Overnight Person-Trips



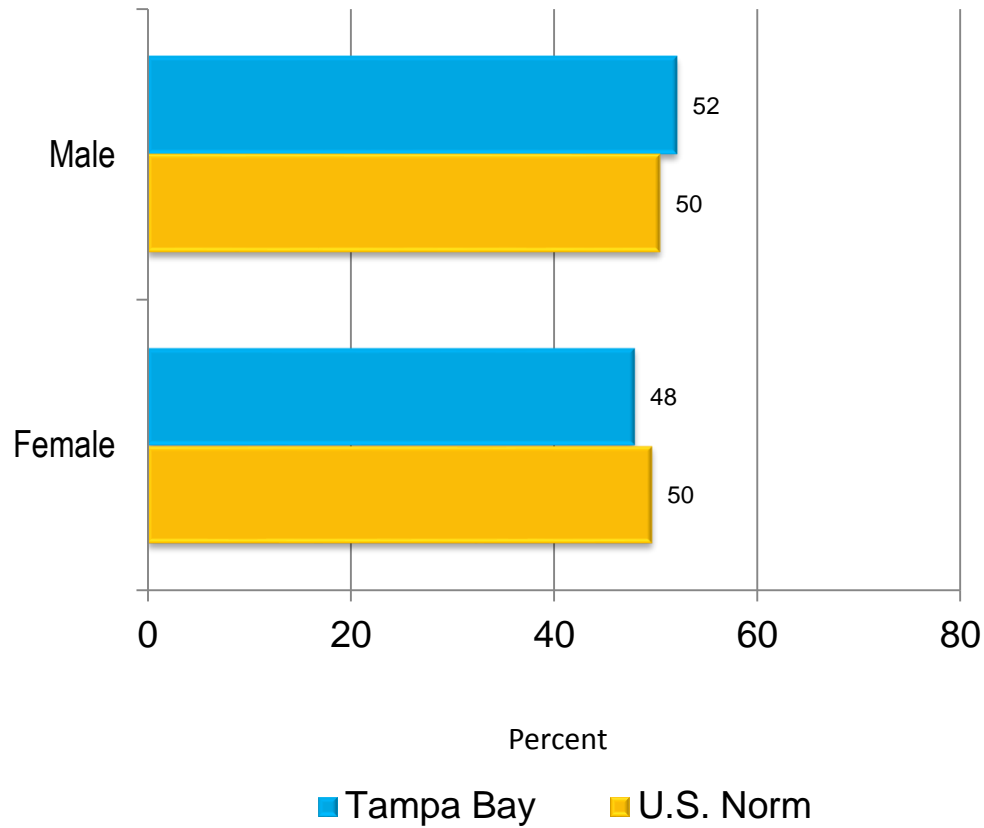


Demographic Profile of Overnight Visitors

Gender



Base: Total Overnight Person-Trips



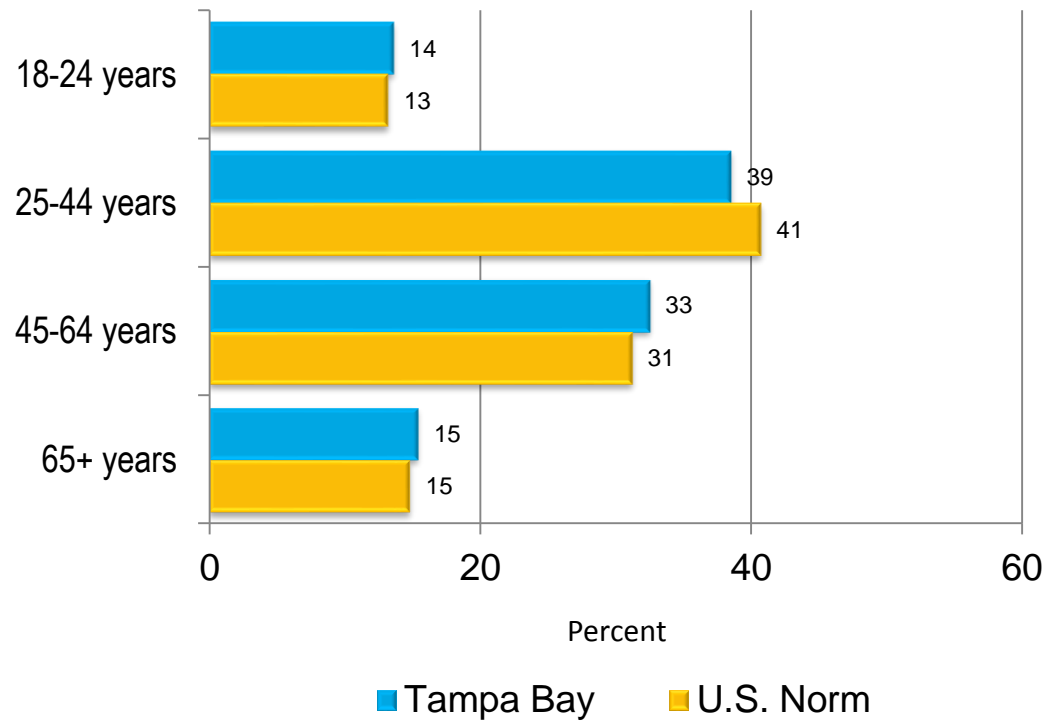
Age



Base: Total Overnight Person-Trips

Average Tampa Bay = 44.6

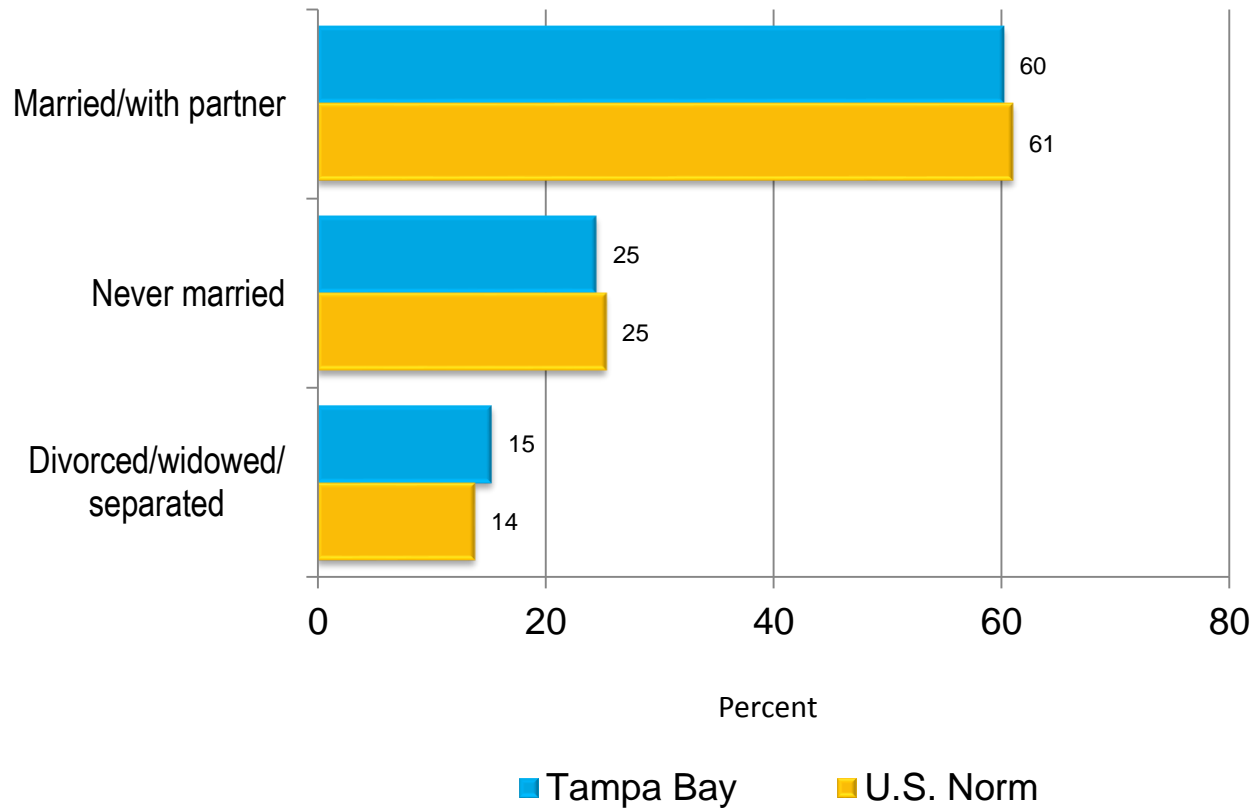
Average U.S. Norm = 44.3



Marital Status



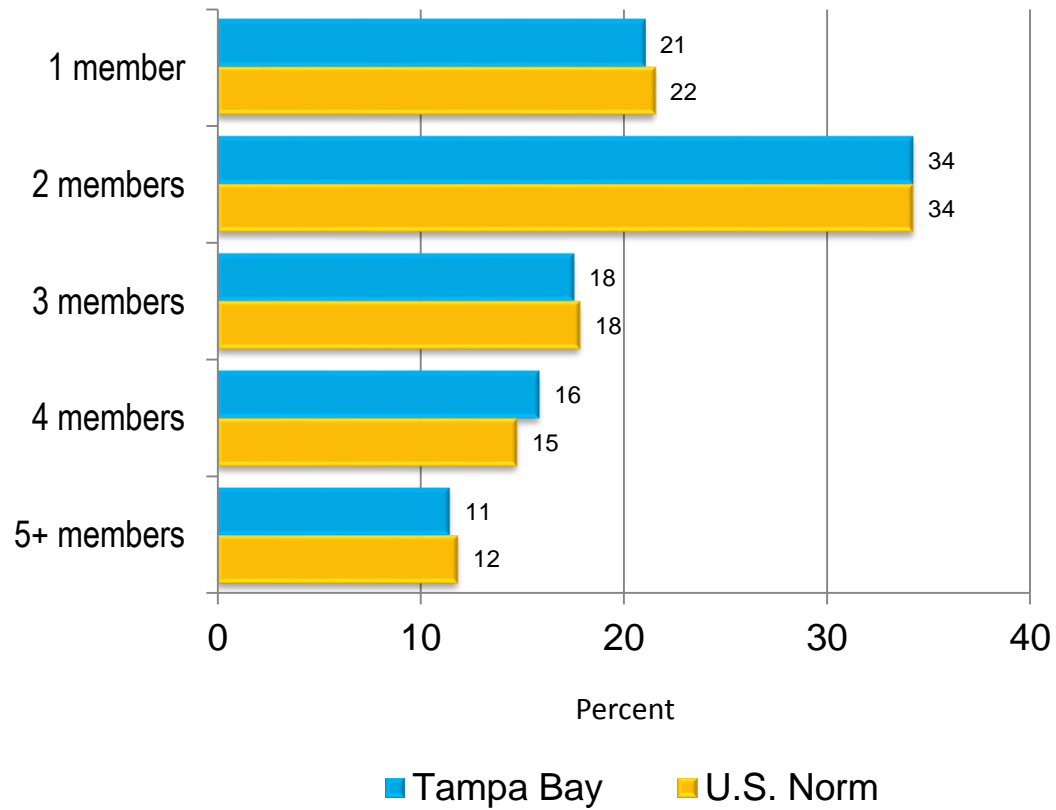
Base: Total Overnight Person-Trips



Household Size



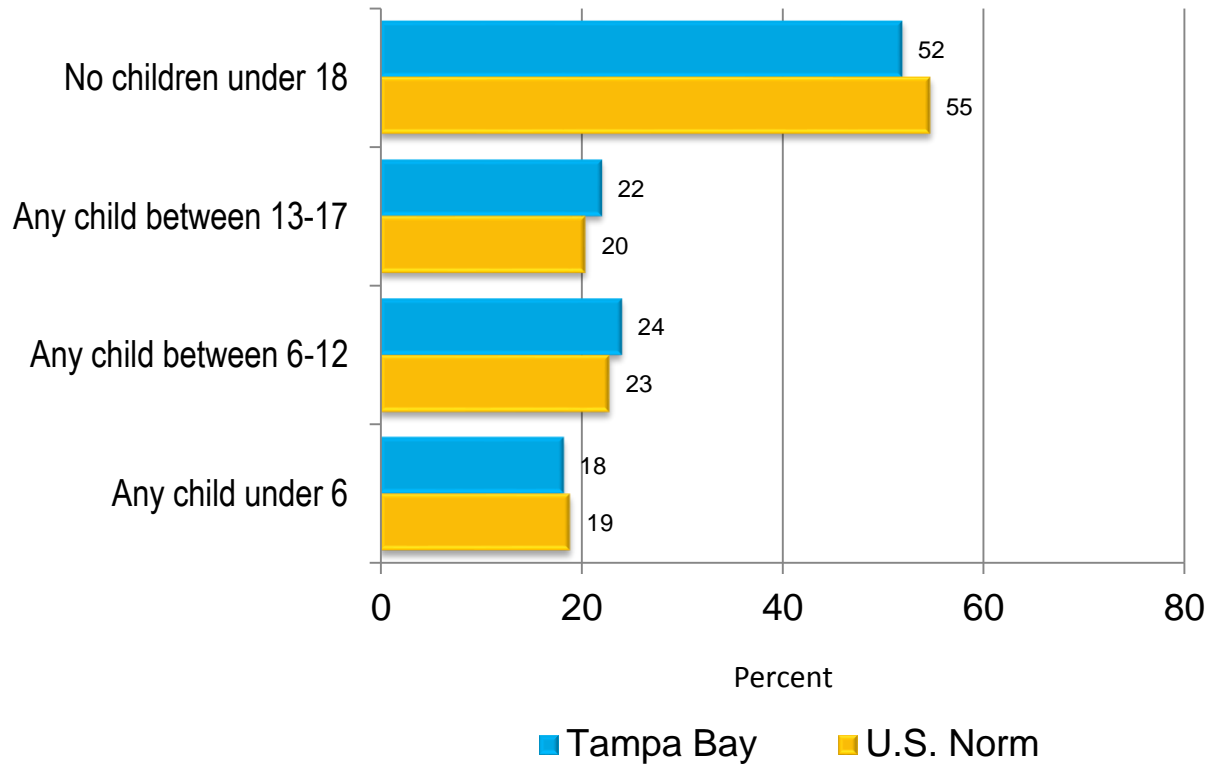
Base: Total Overnight Person-Trips



Children in Household



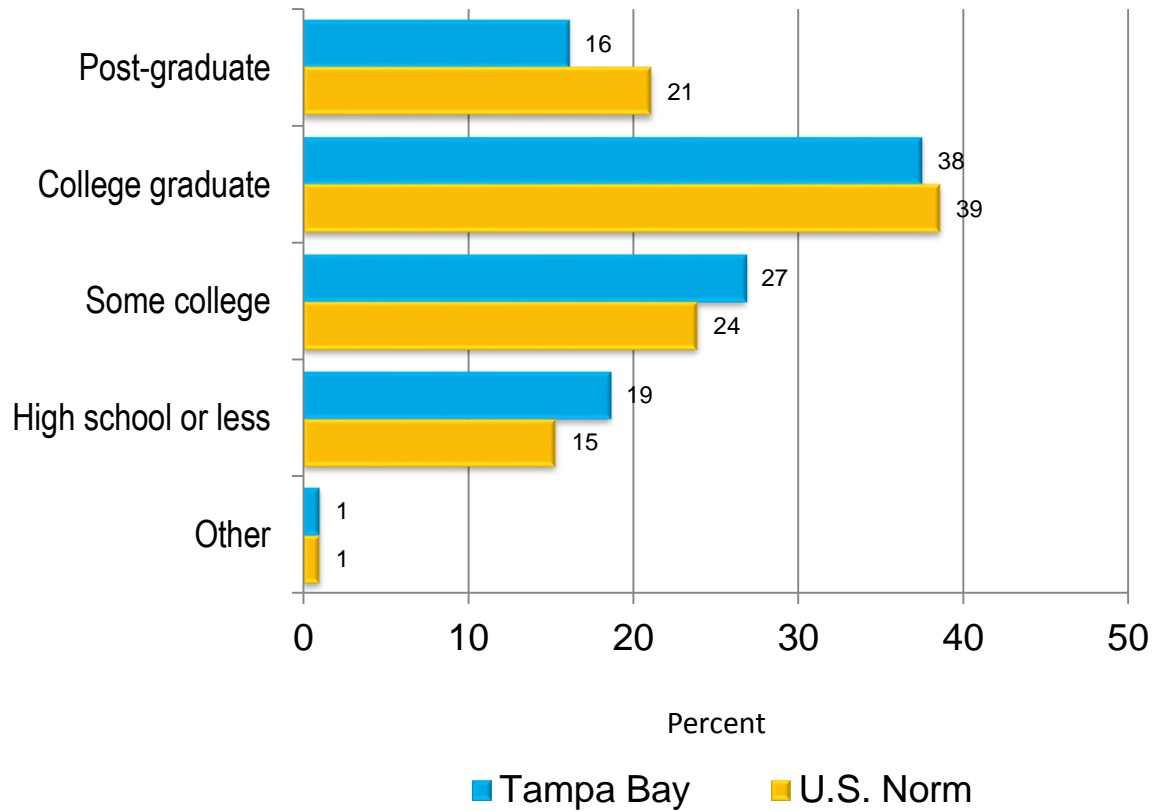
Base: Total Overnight Person Trips



Education



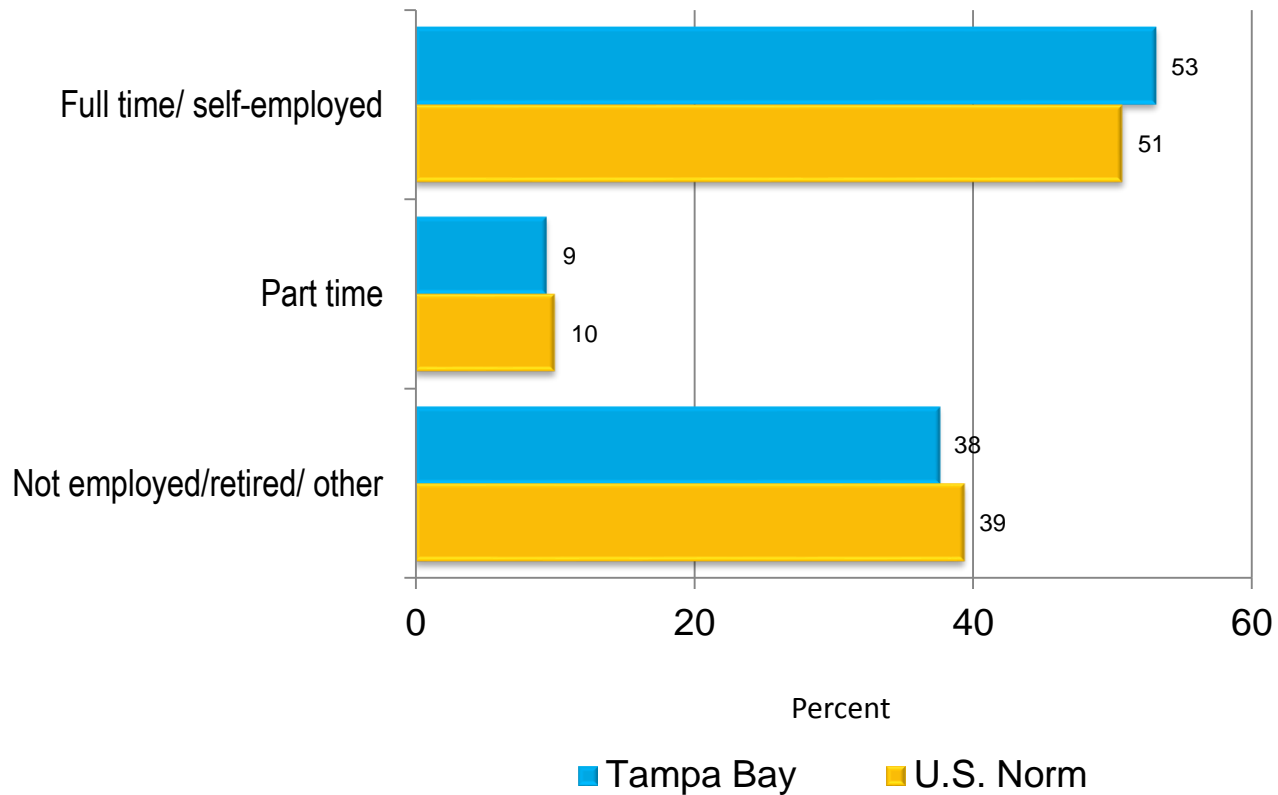
Base: Total Overnight Person-Trips



Employment



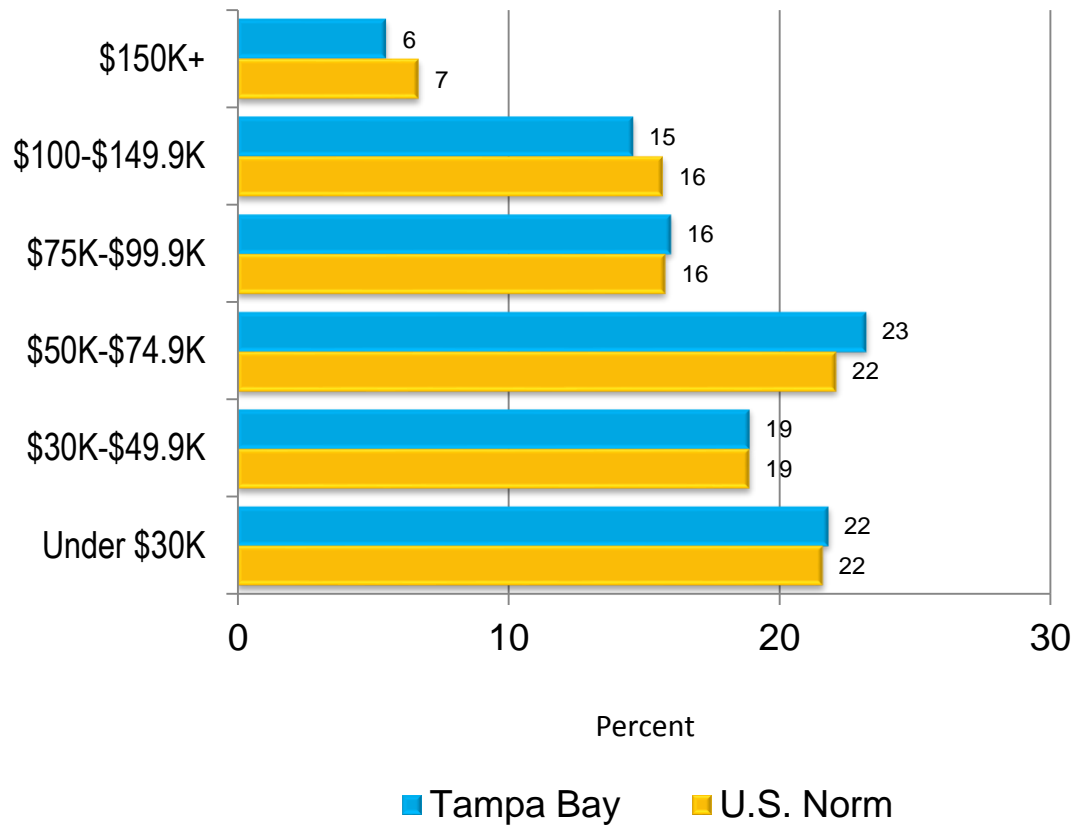
Base: Total Overnight Person-Trips



Household Income



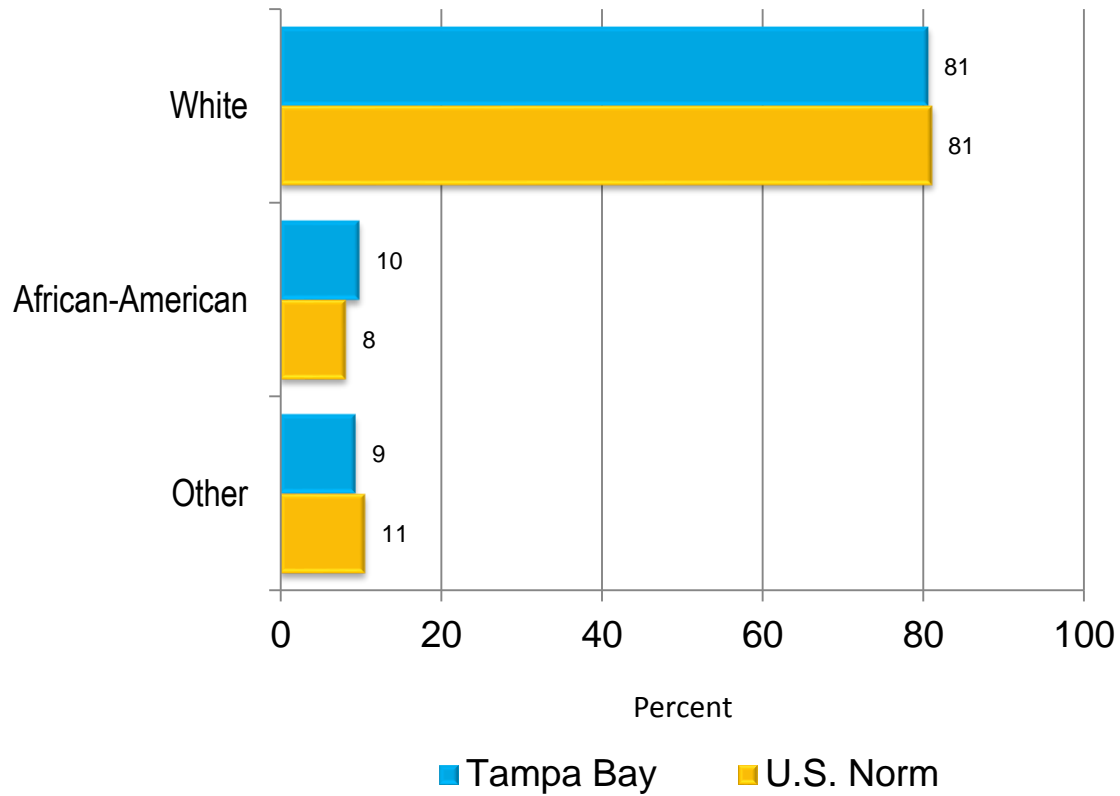
Base: Total Overnight Person-Trips



Race



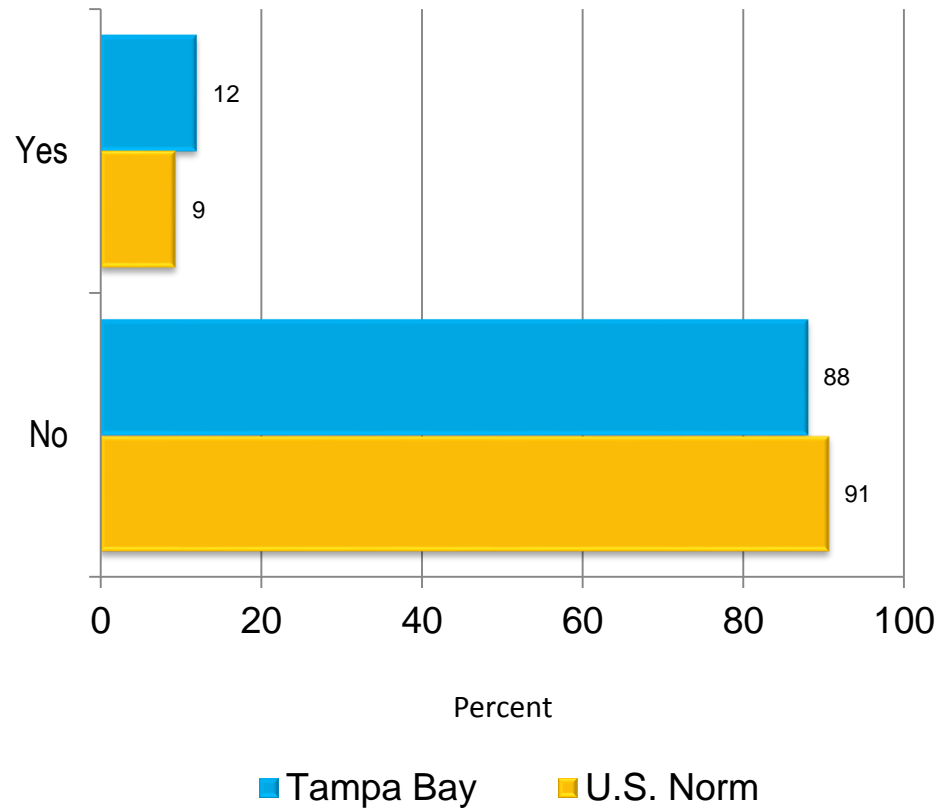
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Day Trip Detail

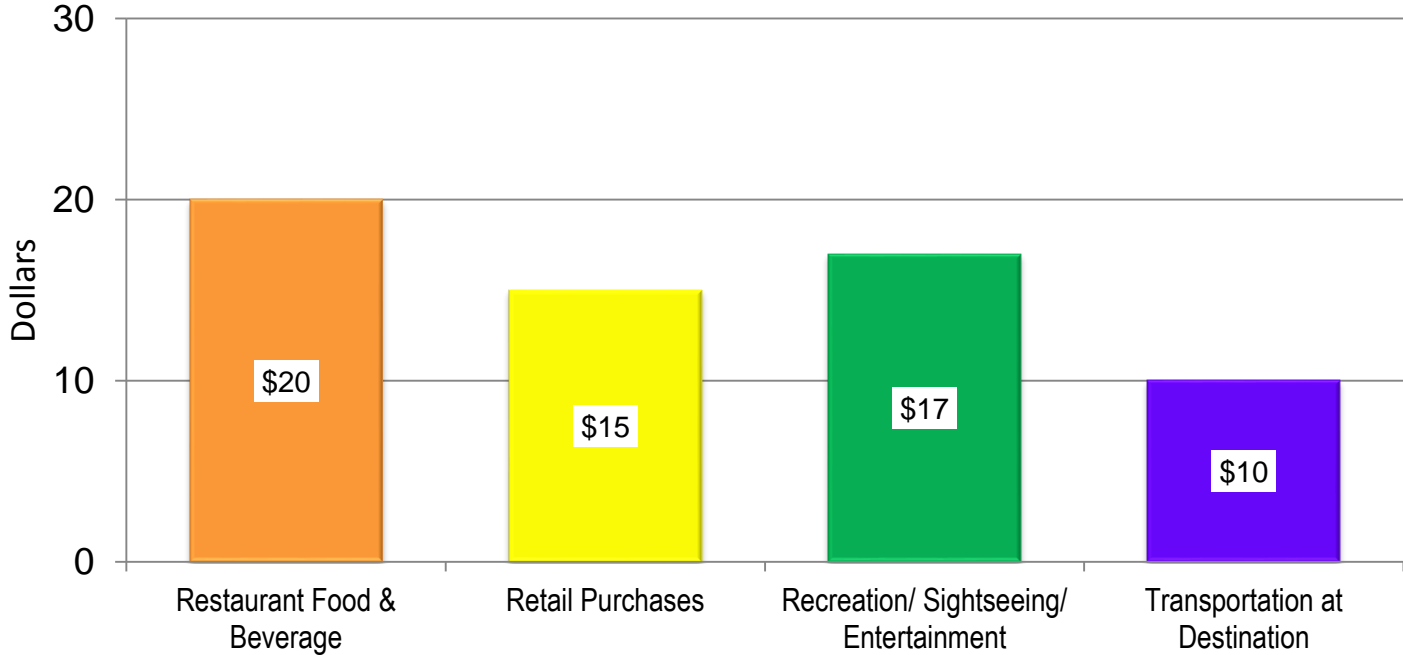


Day Trip Expenditures

Average Per Person Expenditures on Day Trips — By Sector



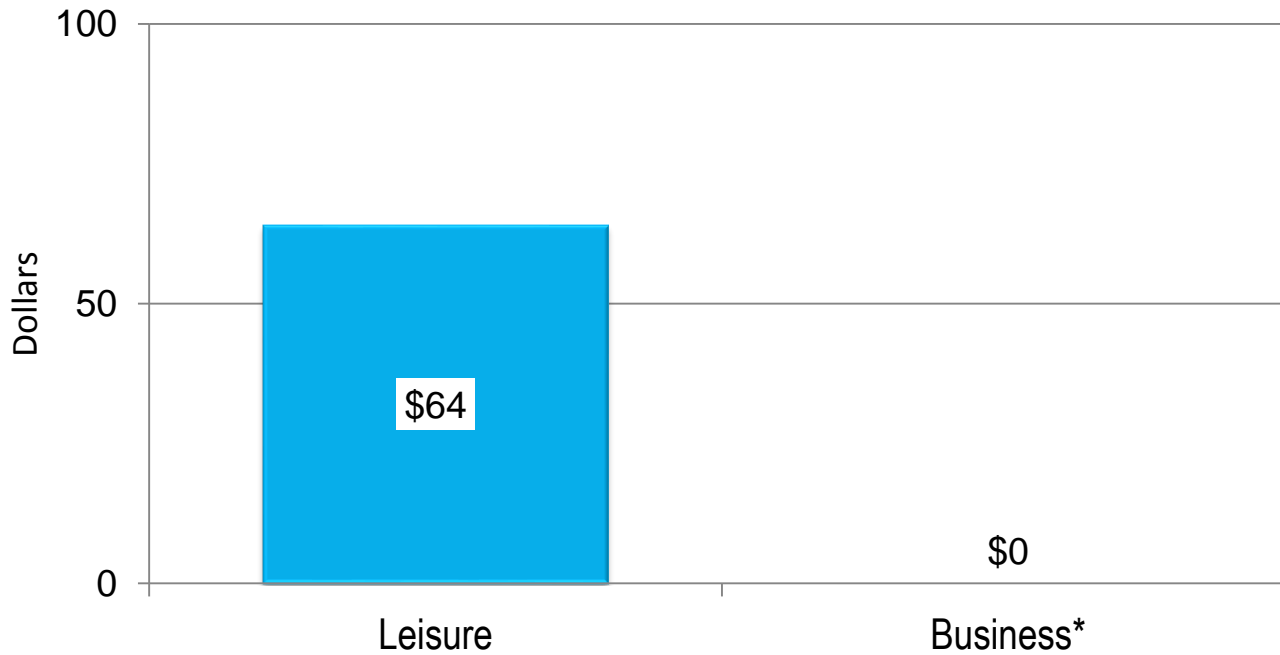
Base: Total Day Person-Trips to Tampa Bay



Average Per Person Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips to Tampa Bay



* Base size too small

Average Per Party Expenditures on Day Trips — By Sector



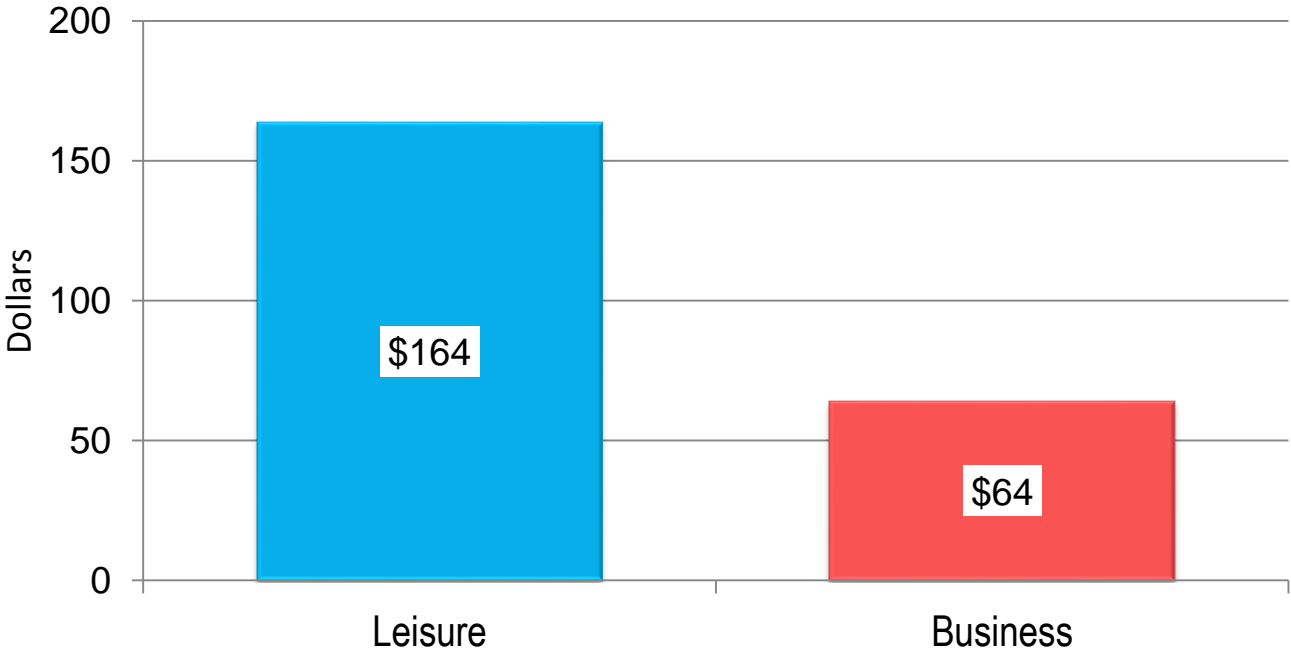
Base: Total Day Person-Trips to Tampa Bay



Average Per Party Expenditures on Day Trip — by Trip Purpose



Base: Total Day Person-Trips to Tampa Bay





Day Trip Characteristics

Main Purpose of Trip



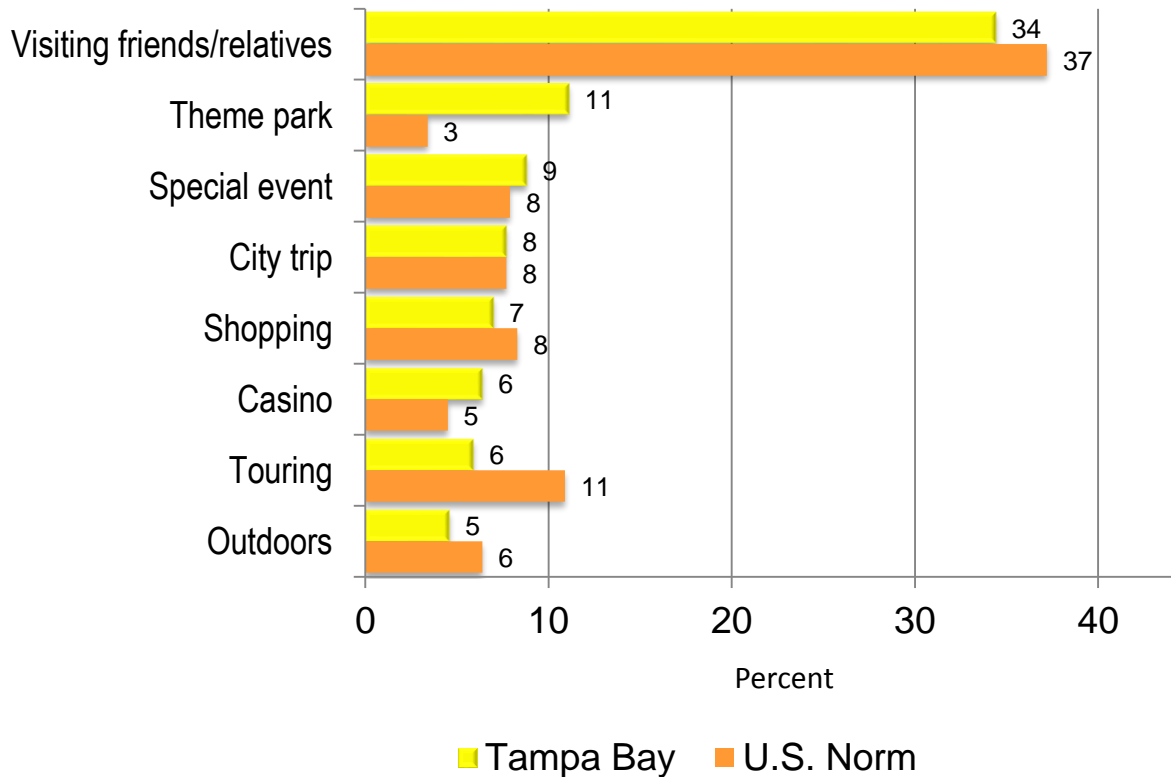
Base: Total Day Person-Trips to Tampa Bay



Main Purpose of Leisure Trip — Tampa Bay vs. National Norm



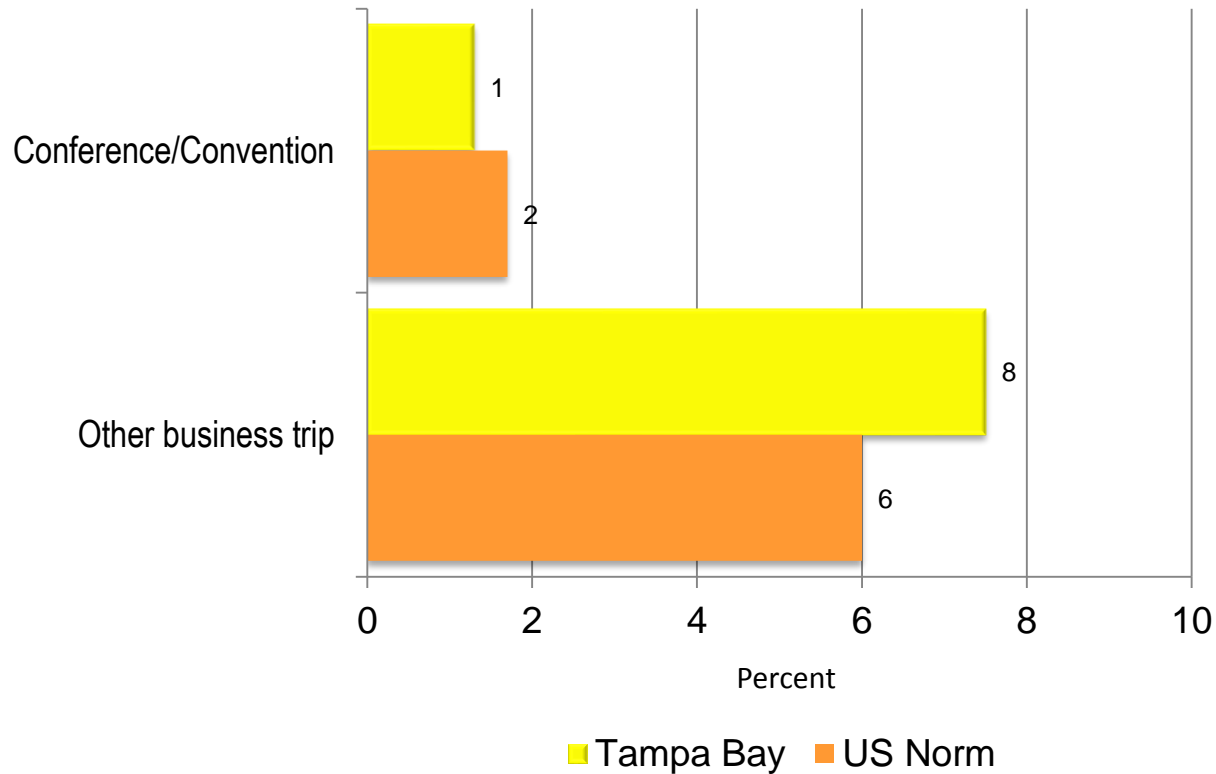
Base: Total Day Person-Trips



Main Purpose of Business Trip – Tampa Bay vs. National Norm



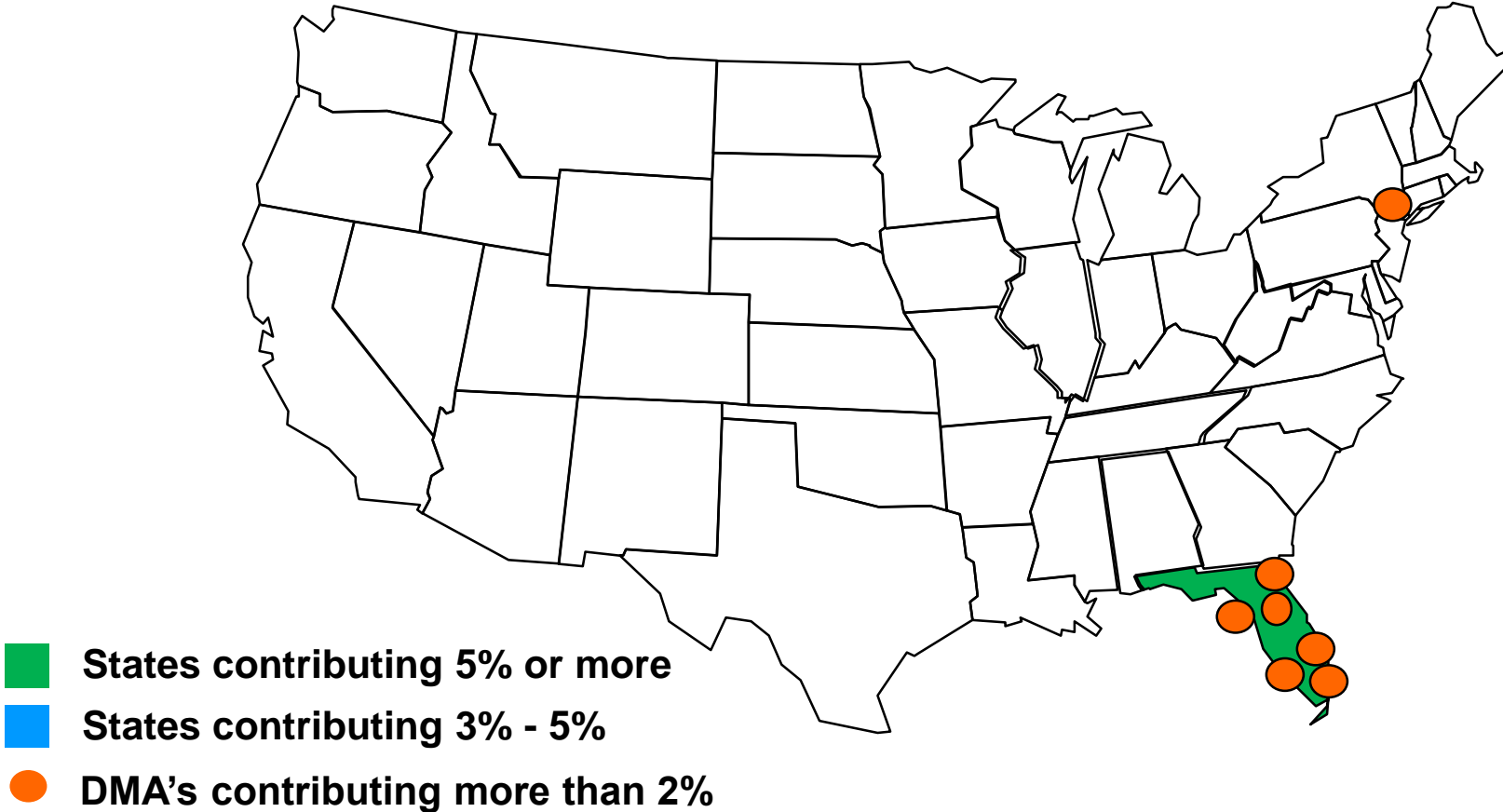
Base: Total Day Person-Trips



Sources of Business



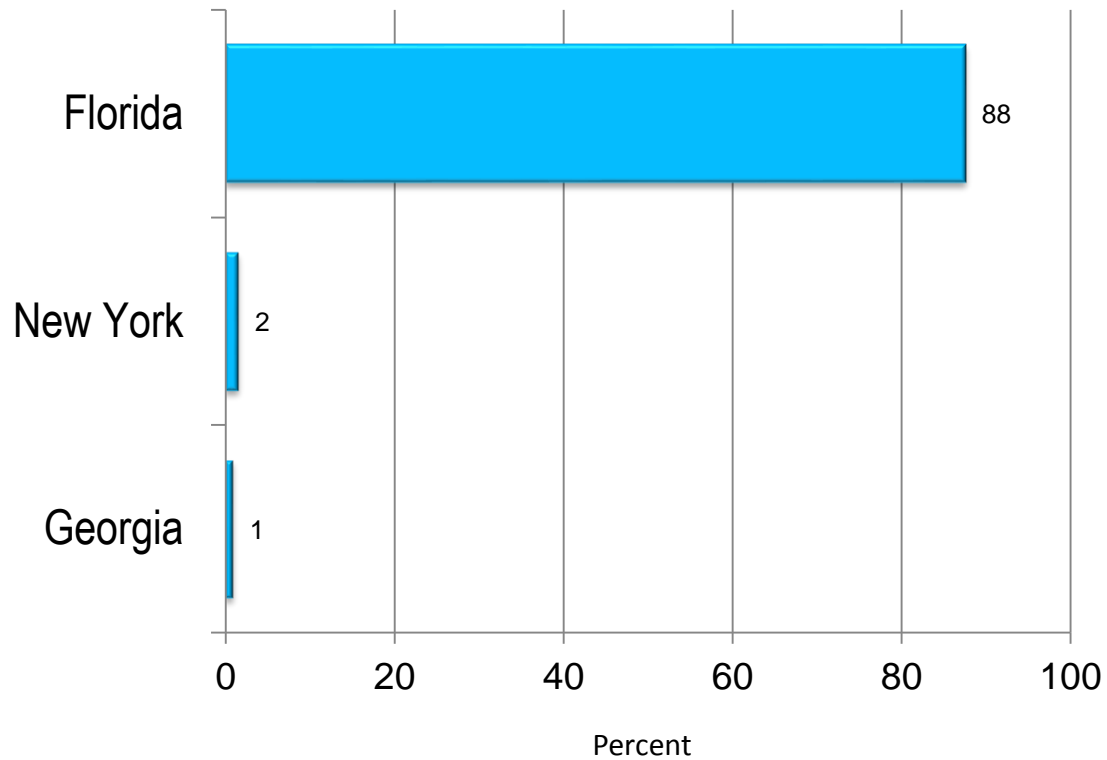
Base: Total Day Person-Trips to Tampa Bay



State Origin Of Trip



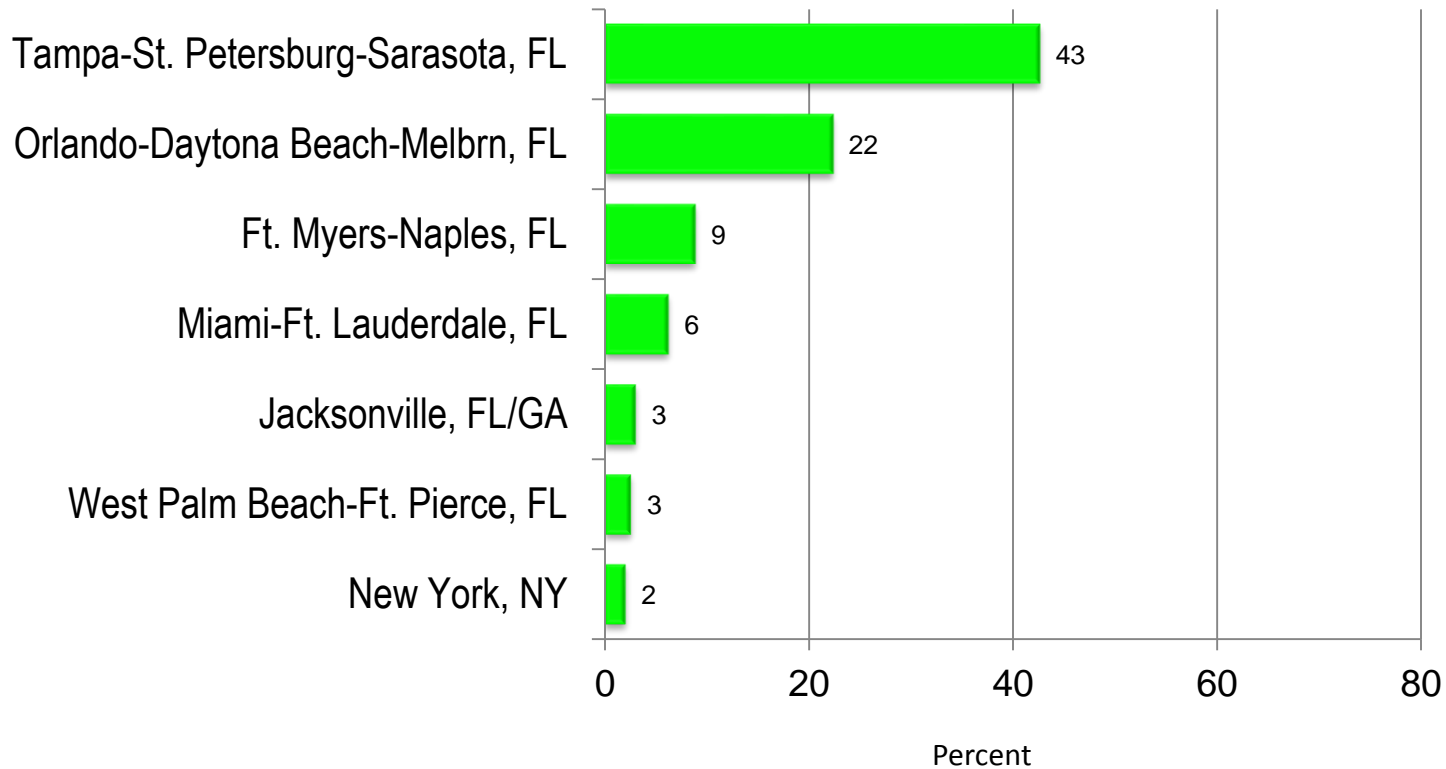
Base: Total Day Person-Trips to Tampa Bay



DMA Origin Of Trip



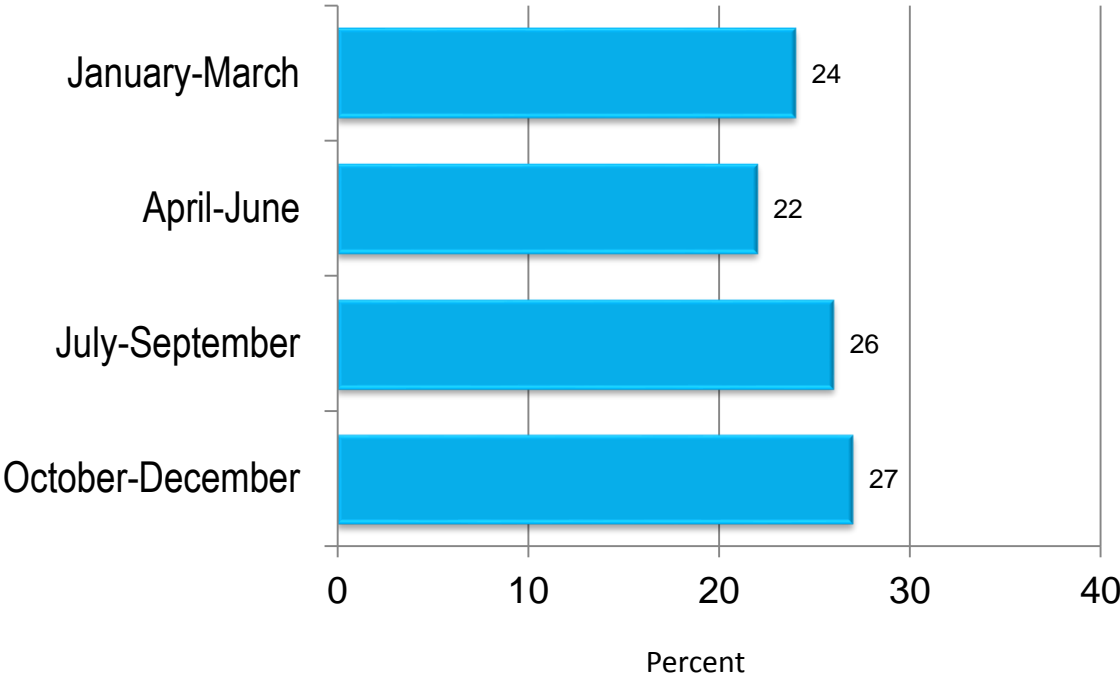
Base: Total Day Person-Trips to Tampa Bay



Season of Trip



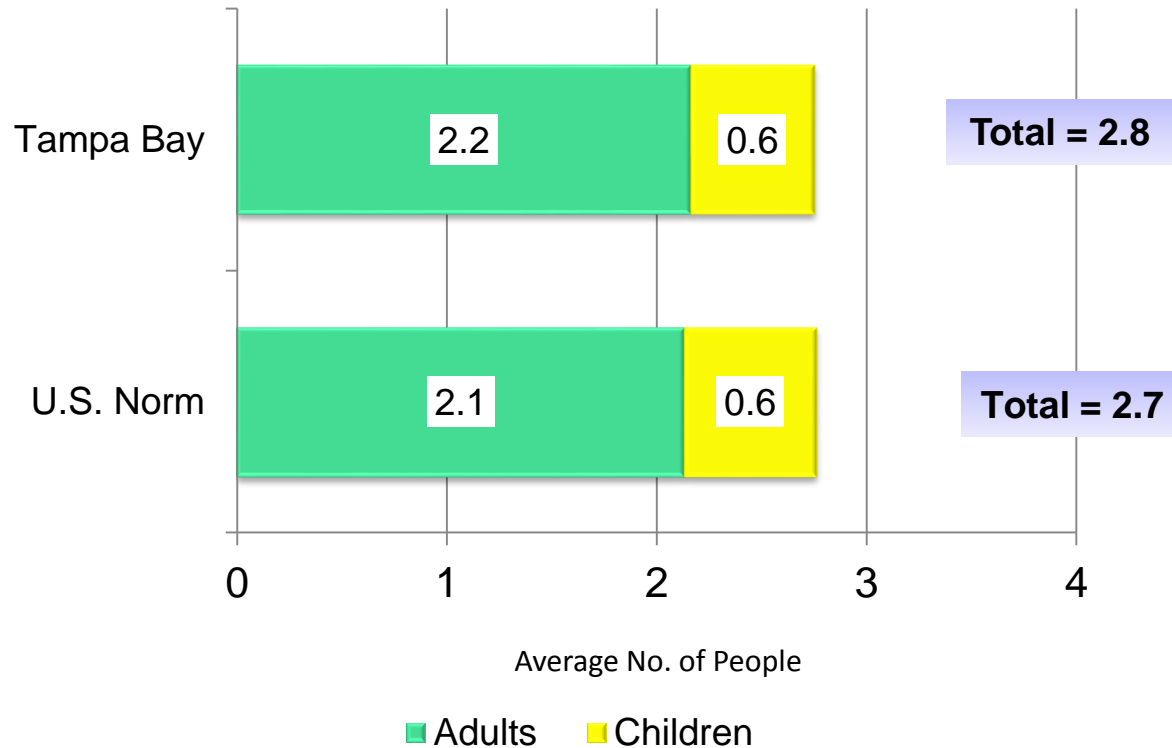
Base: Total Day Person-Trips to Tampa Bay



Size of Travel Party



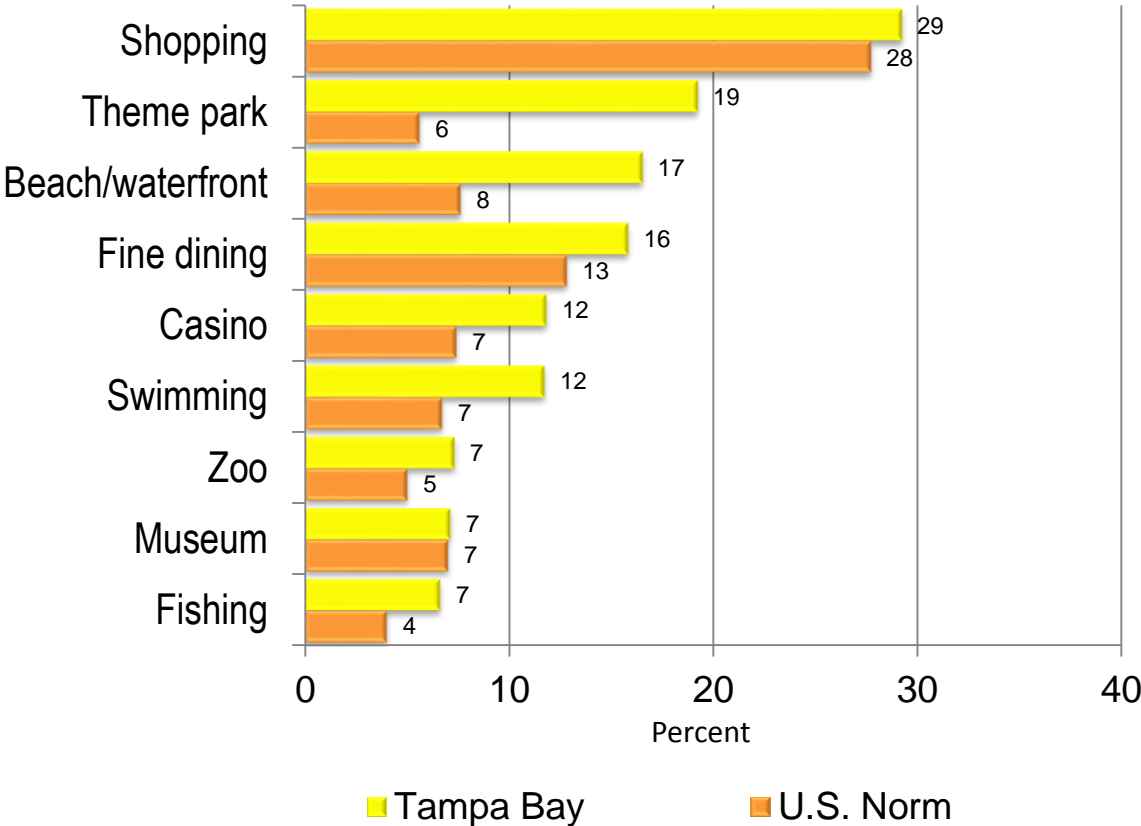
Base: Total Day Person-Trips



Activities and Experiences



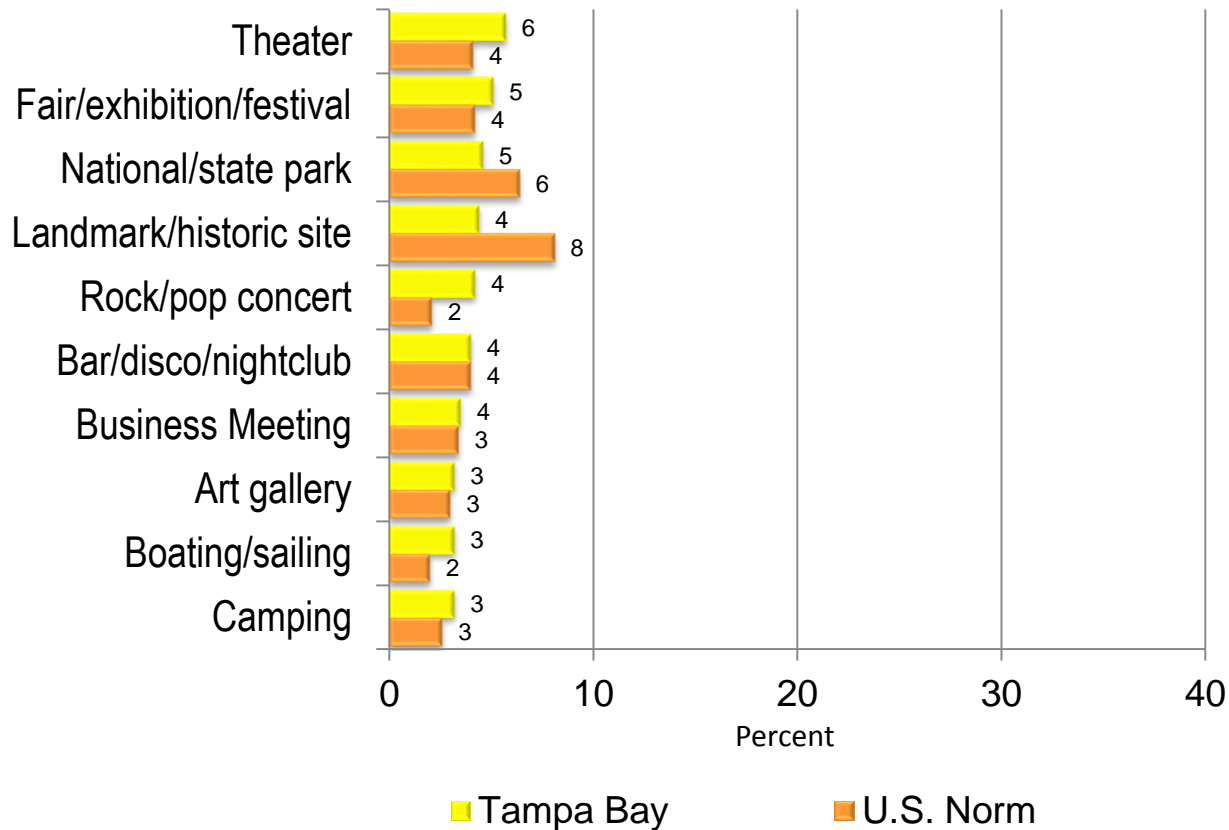
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



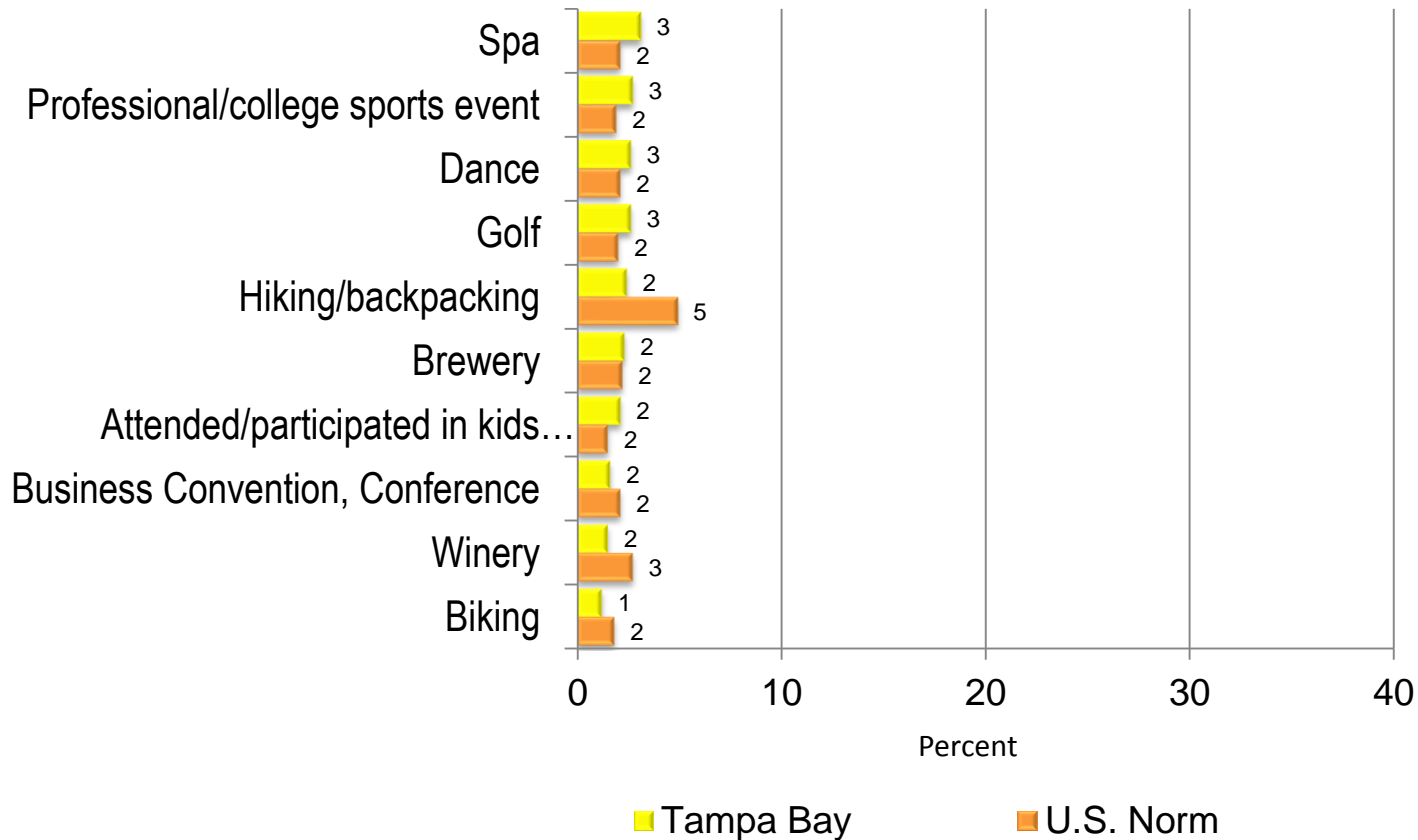
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



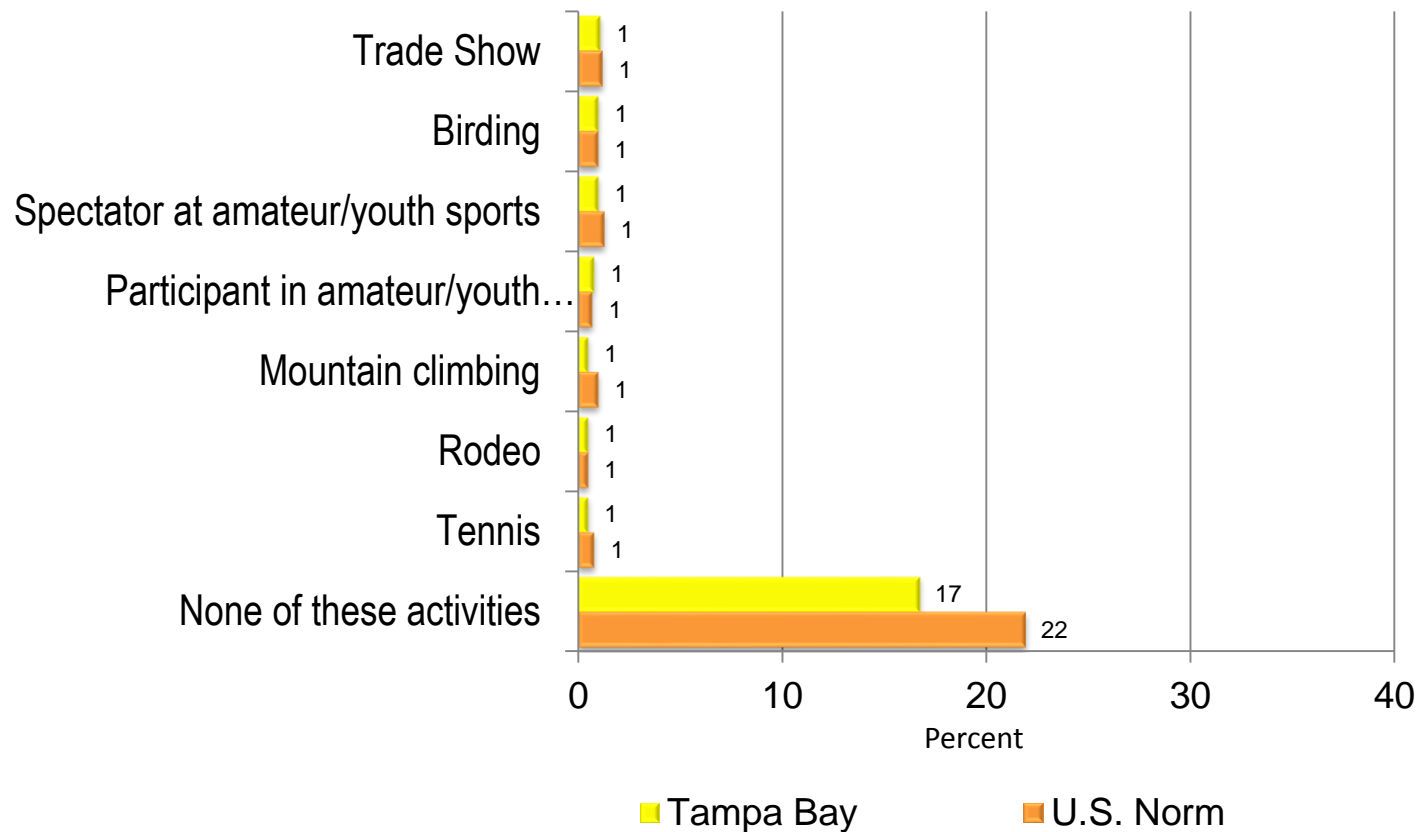
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



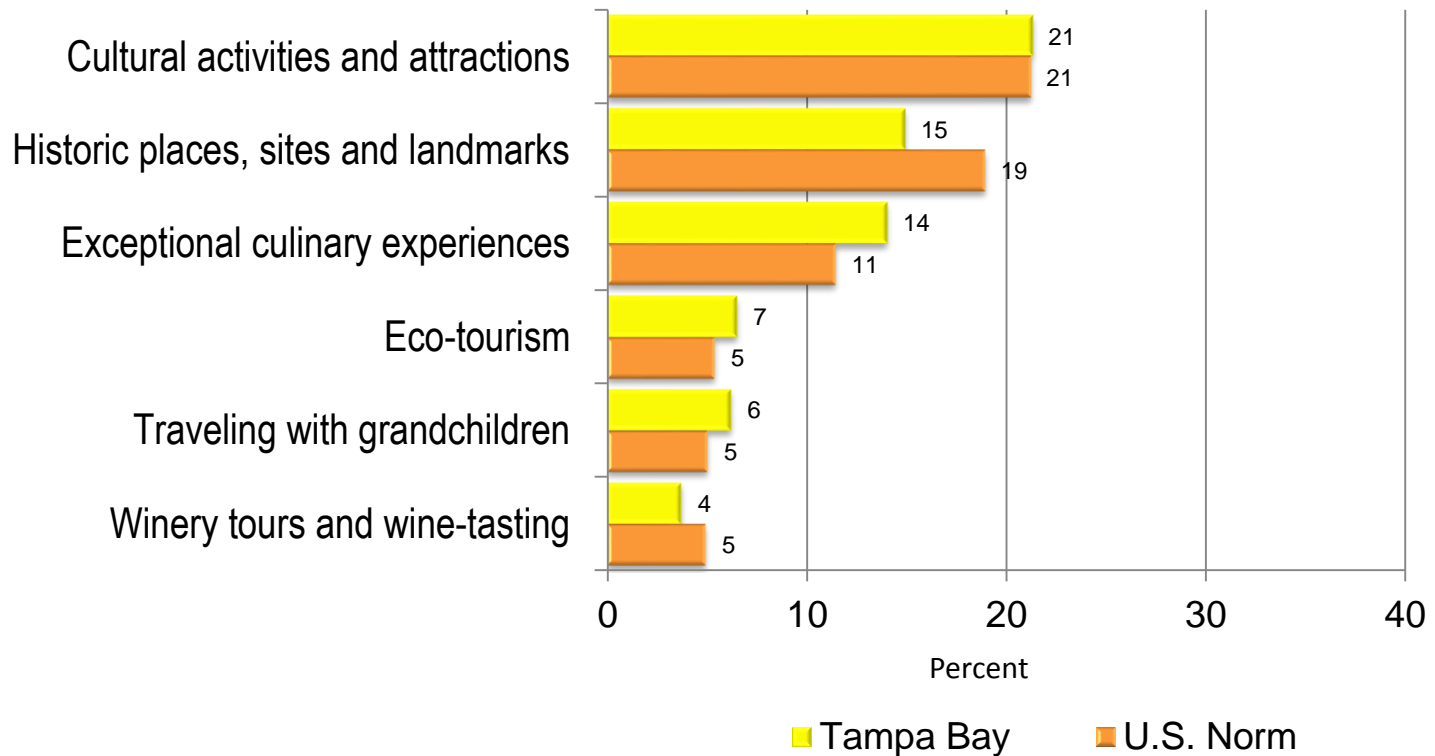
Base: Total Day Person-Trips



Activities of Special Interest



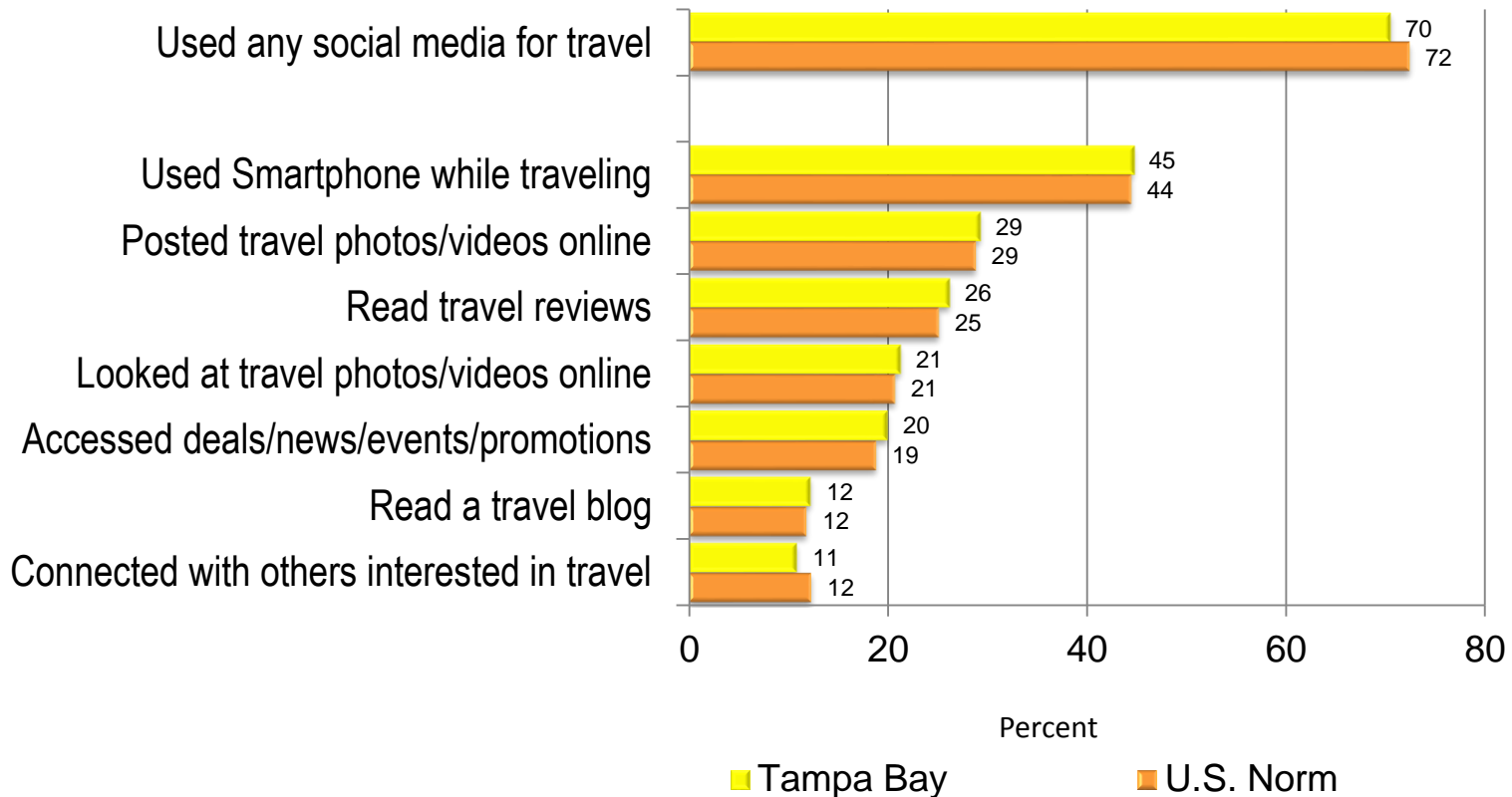
Base: Total Day Person-Trips



Use of Social Media for Travel



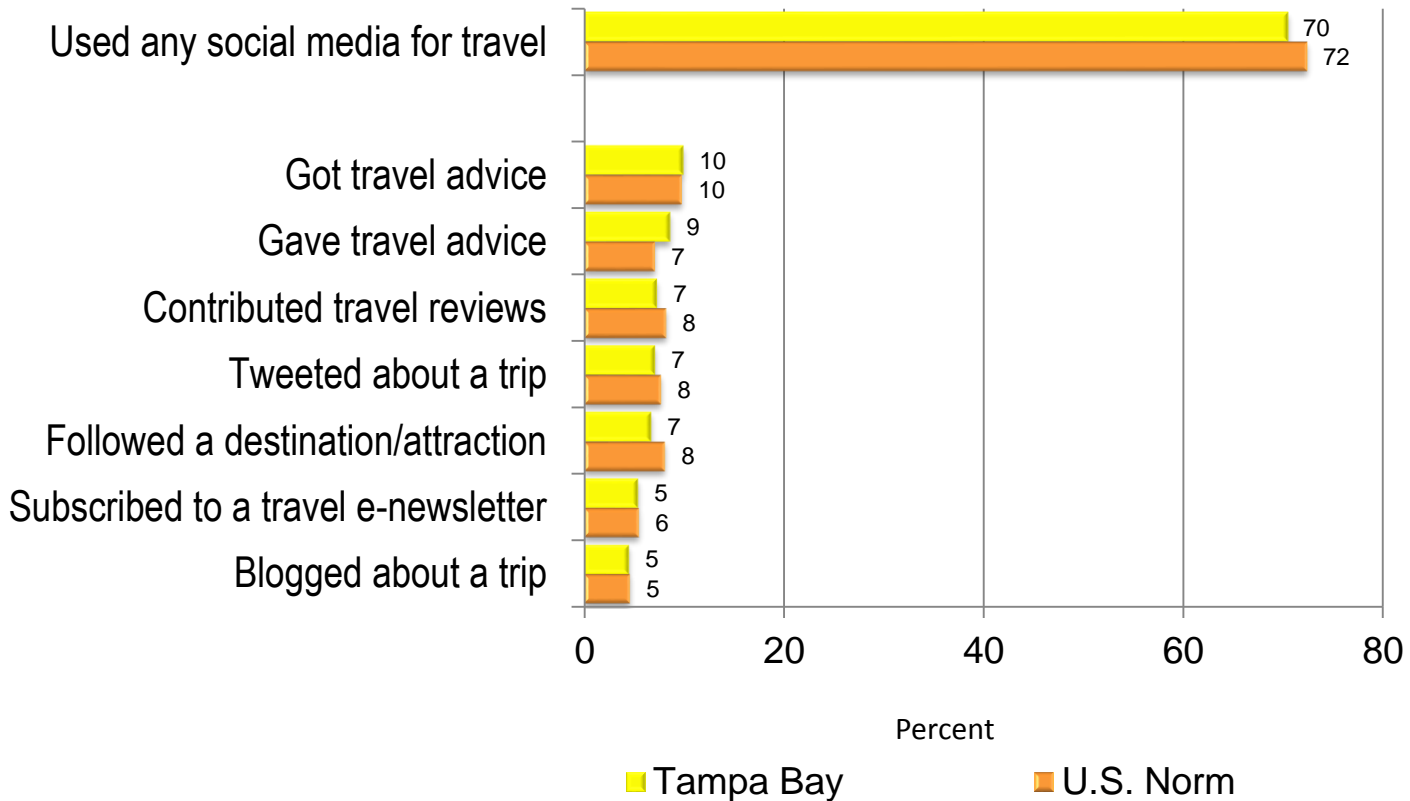
Base: Total Day Person-Trips



Use of Social Media for Travel (Cont'd)



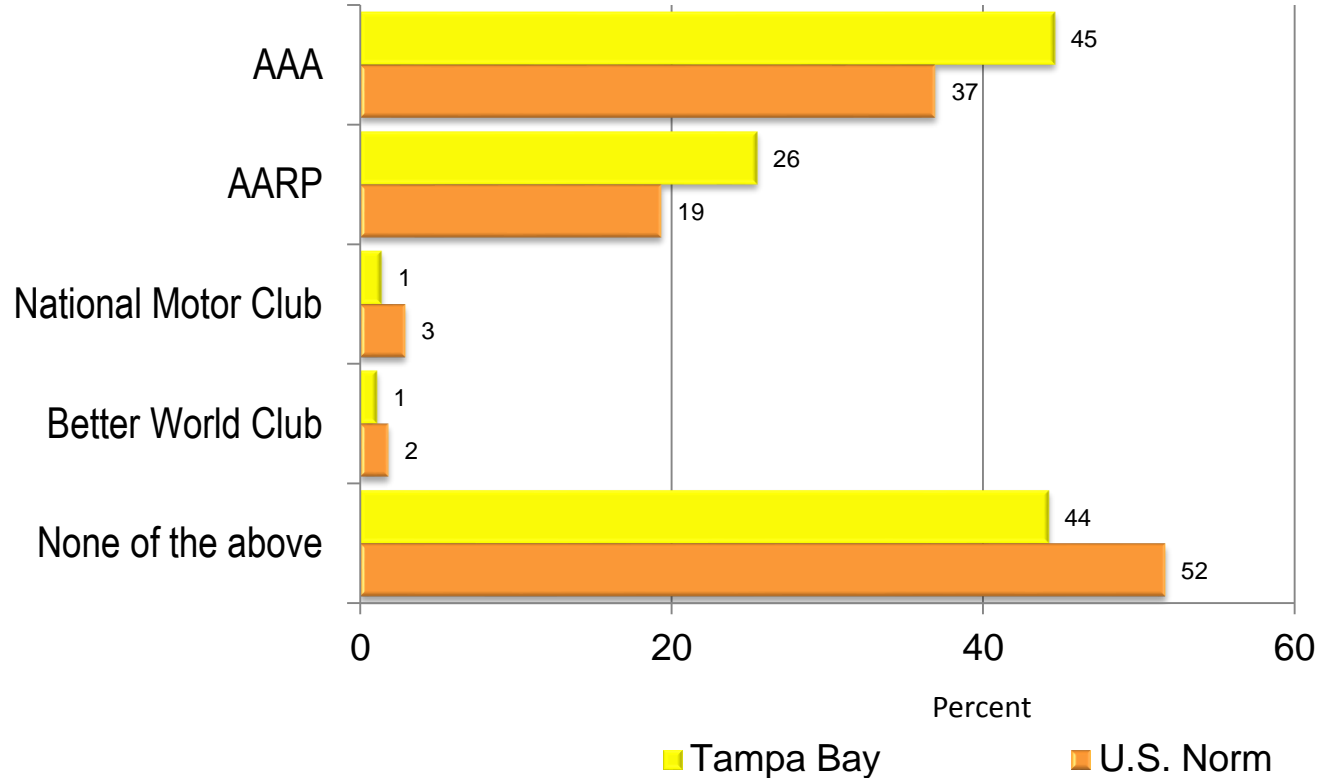
Base: Total Day Person-Trips



Club Membership



Base: Total Day Person-Trips



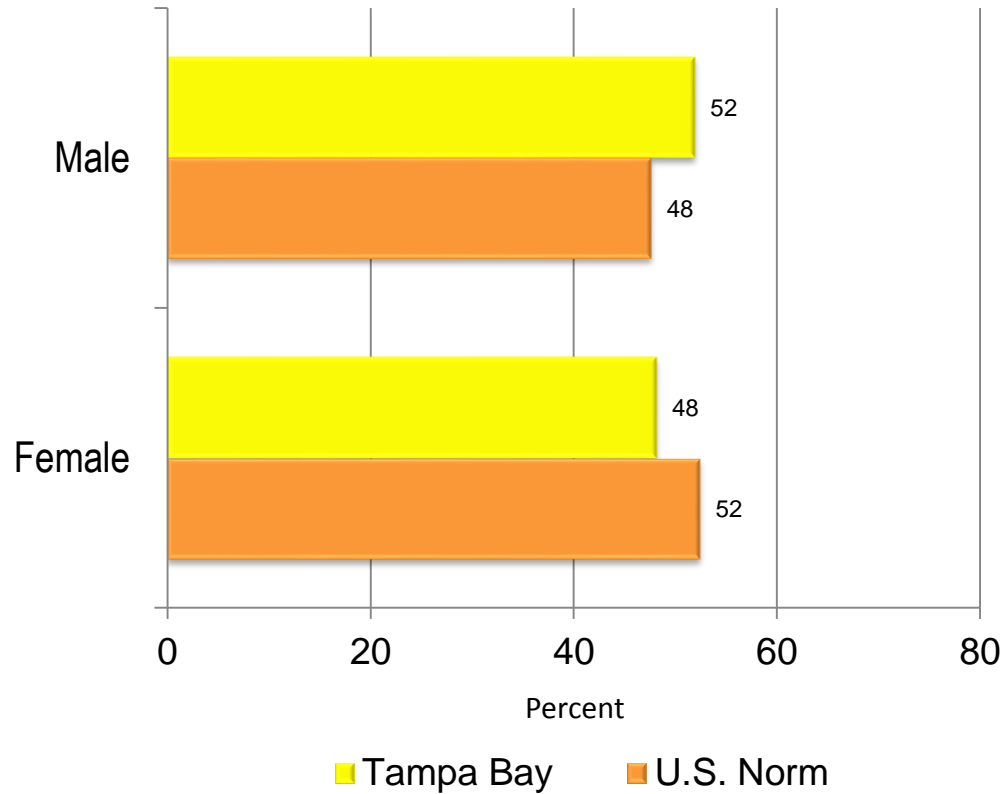


Demographic Profile of Day Visitors

Gender



Base: Total Day Person-Trips



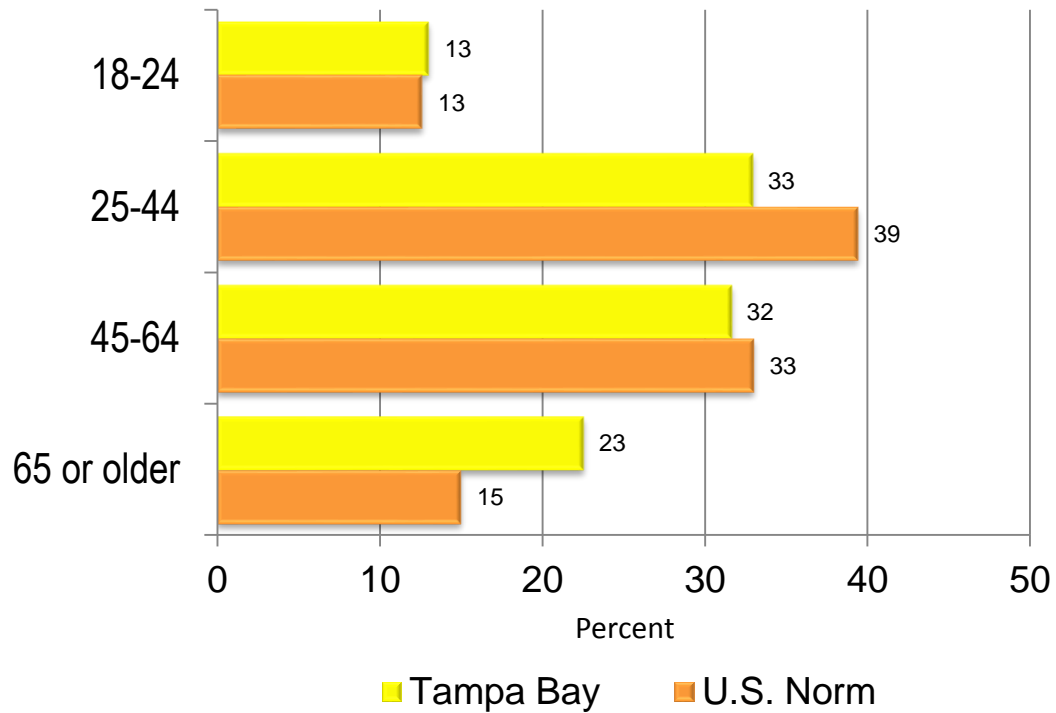
Age



Base: Total Day Person-Trips

Average Tampa Bay = 47.3

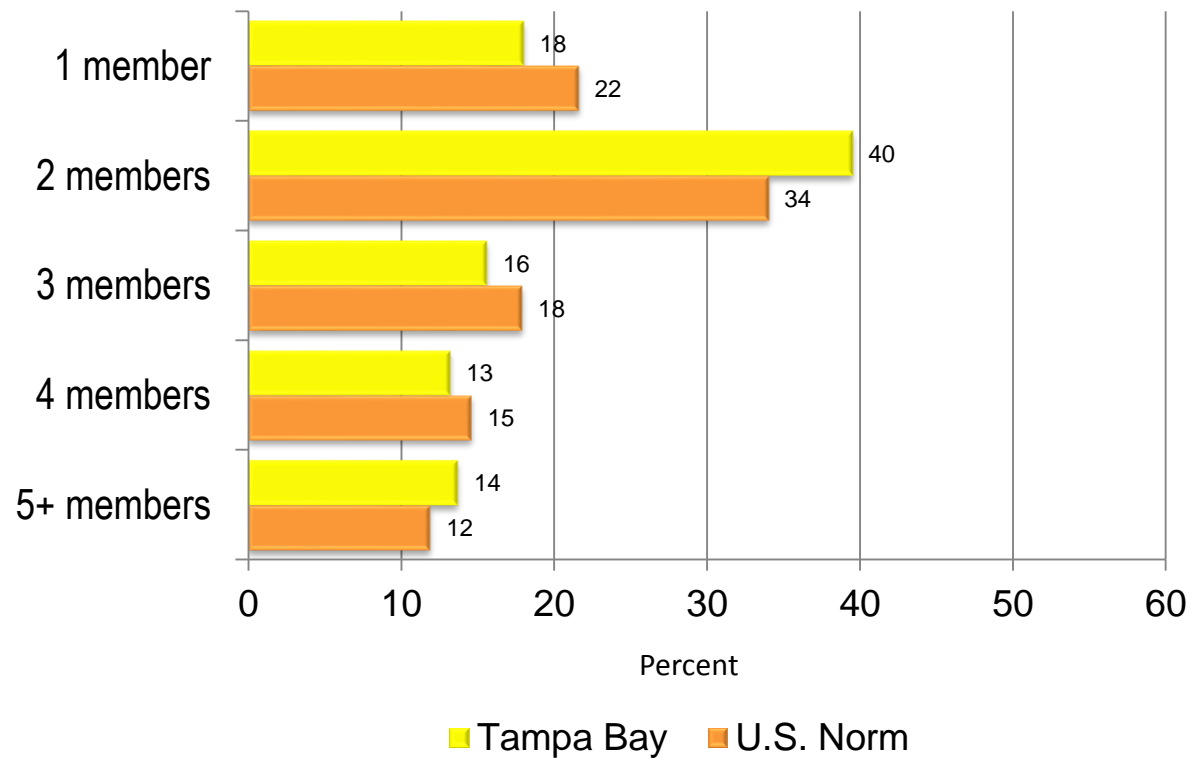
Average US Norm = 44.8



Household Size



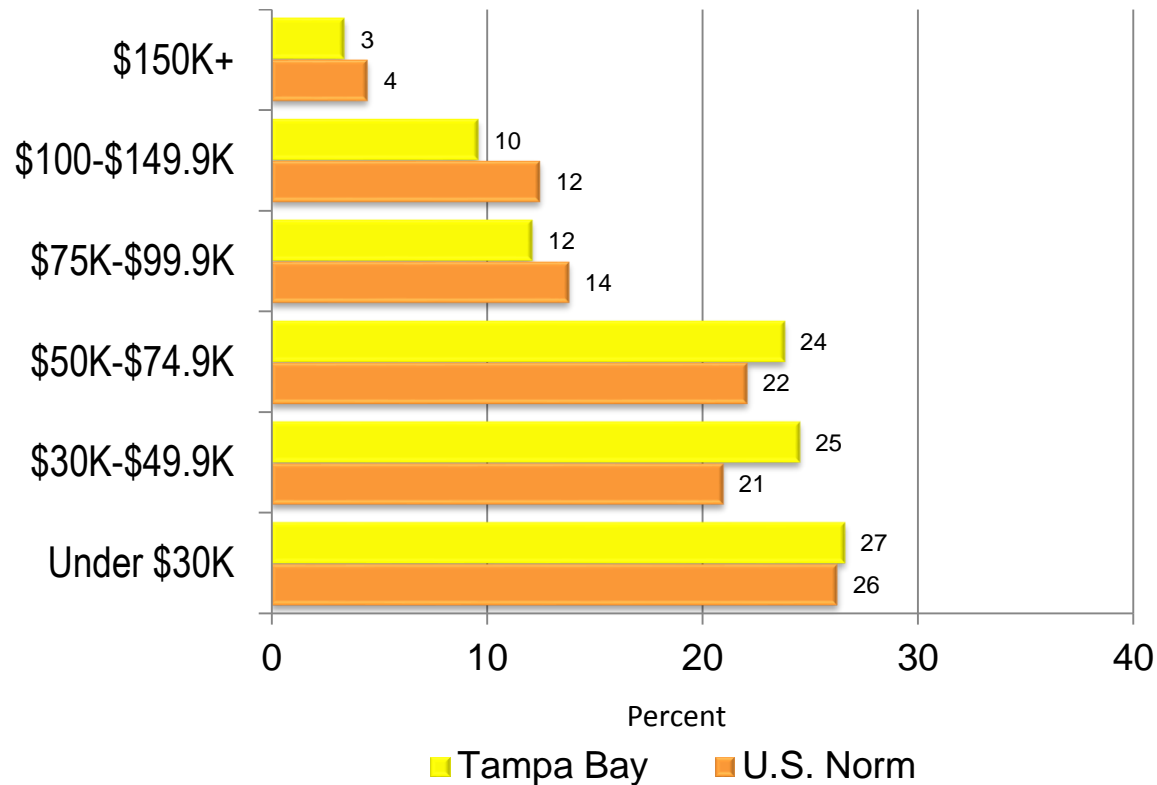
Base: Total Day Person-Trips



Household Income



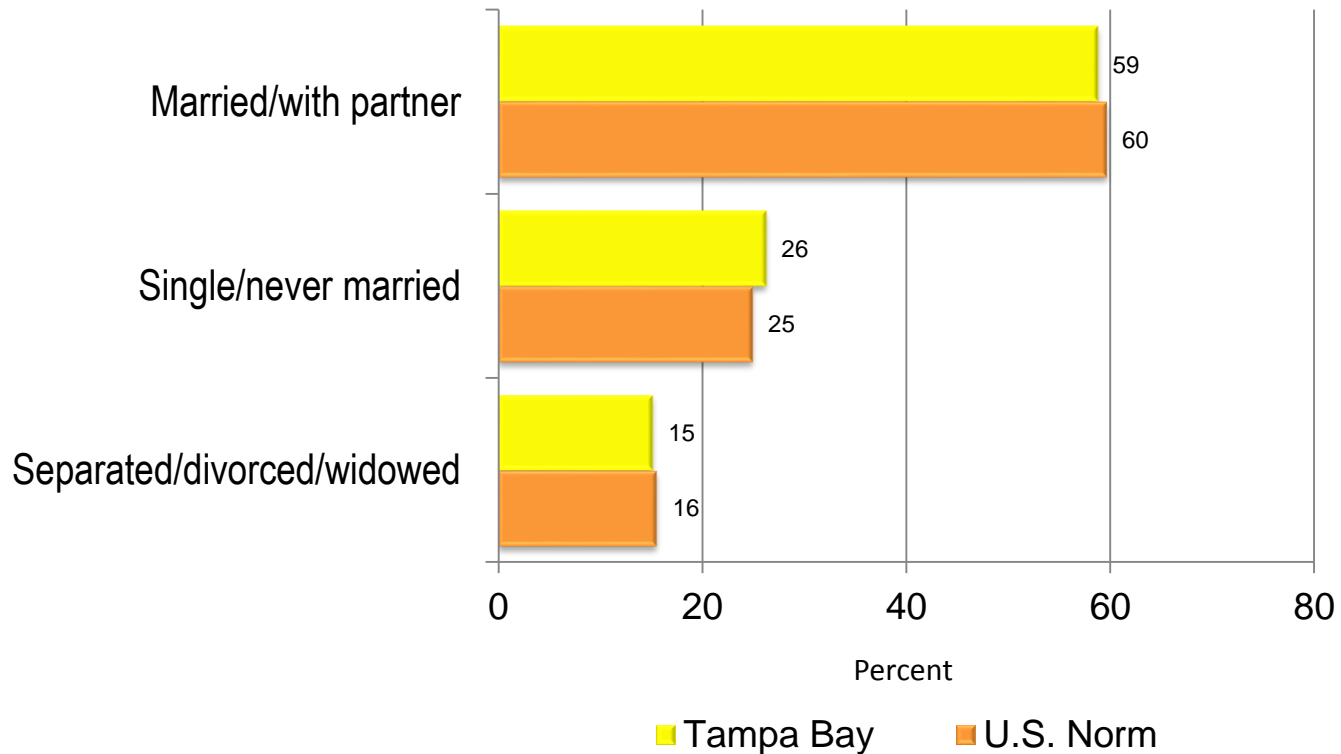
Base: Total Day Person-Trips



Marital Status



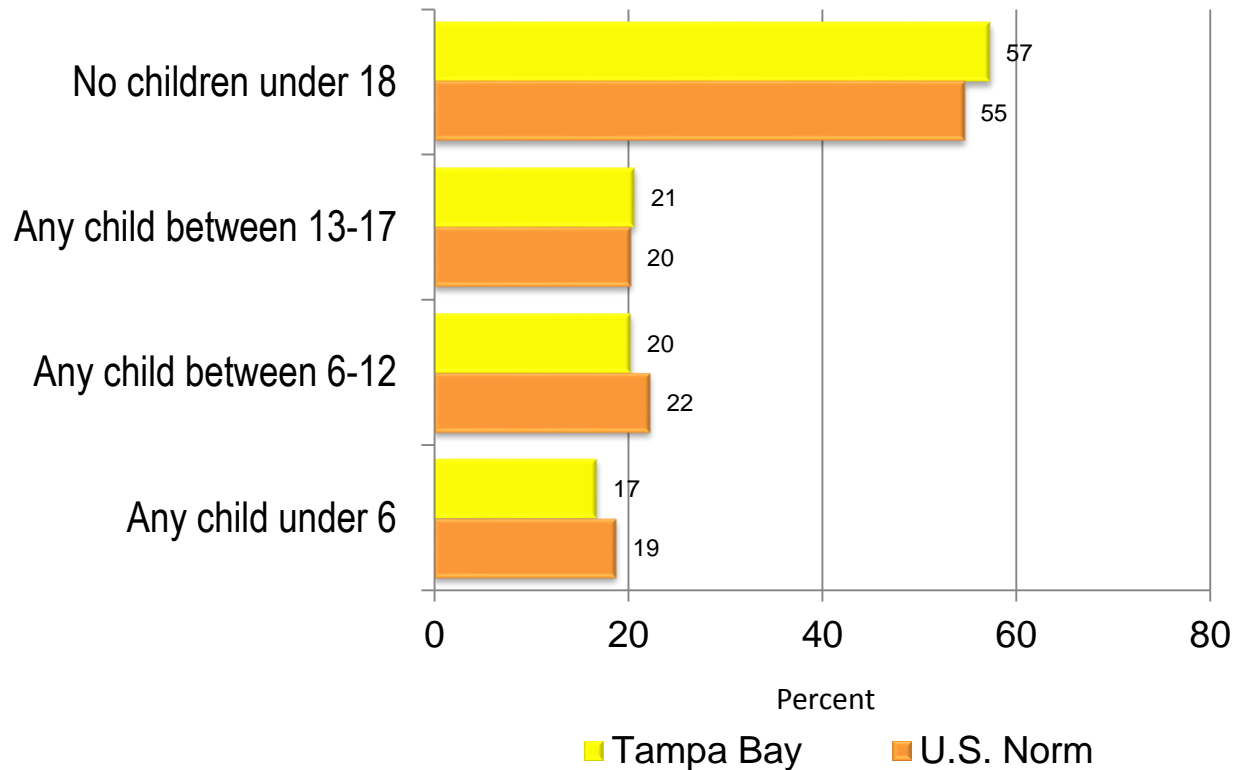
Base: Total Day Person-Trips



Children in Household



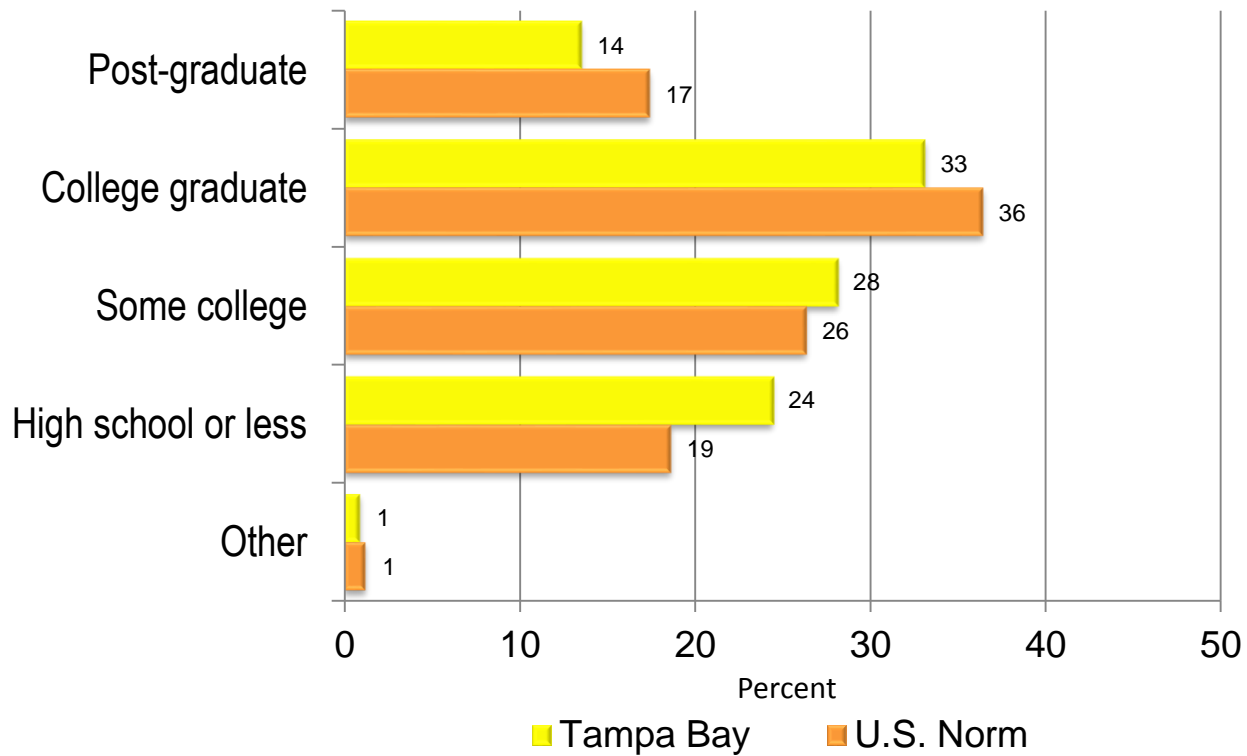
Base: Total Day Person-Trips



Education



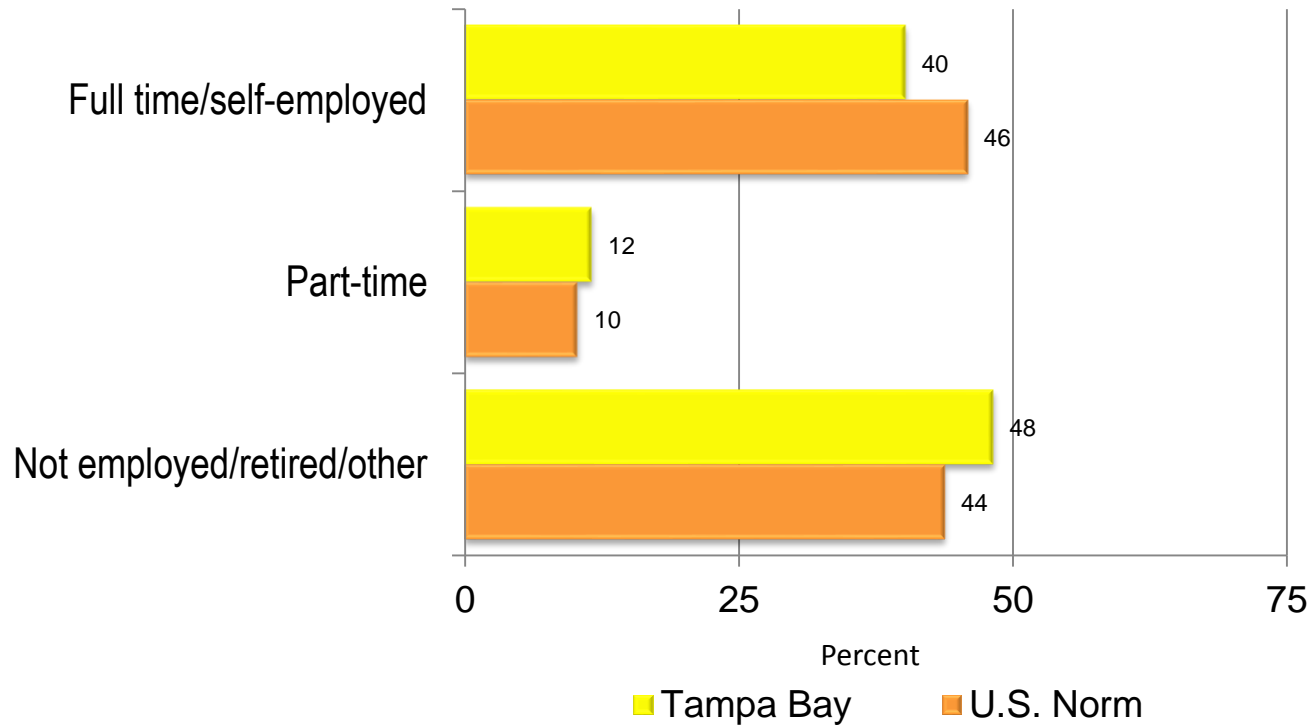
Base: Total Day Person-Trips



Employment



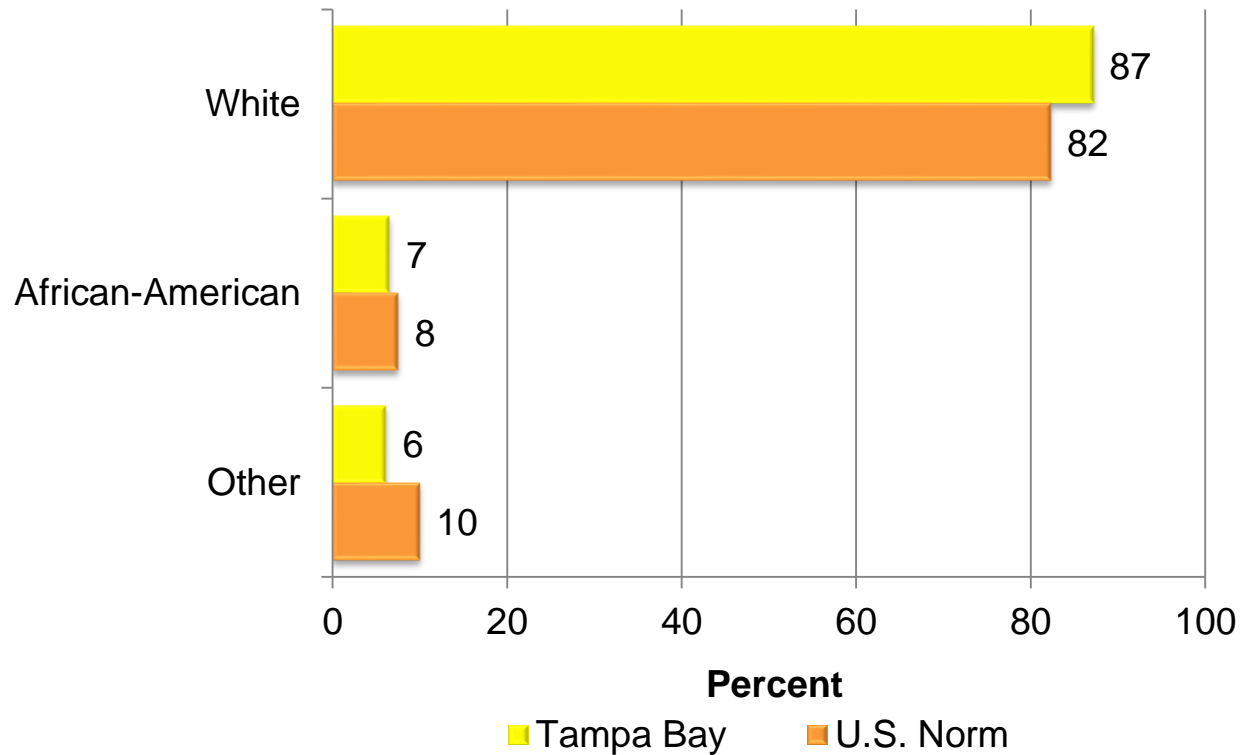
Base: Total Day Person-Trips



Race



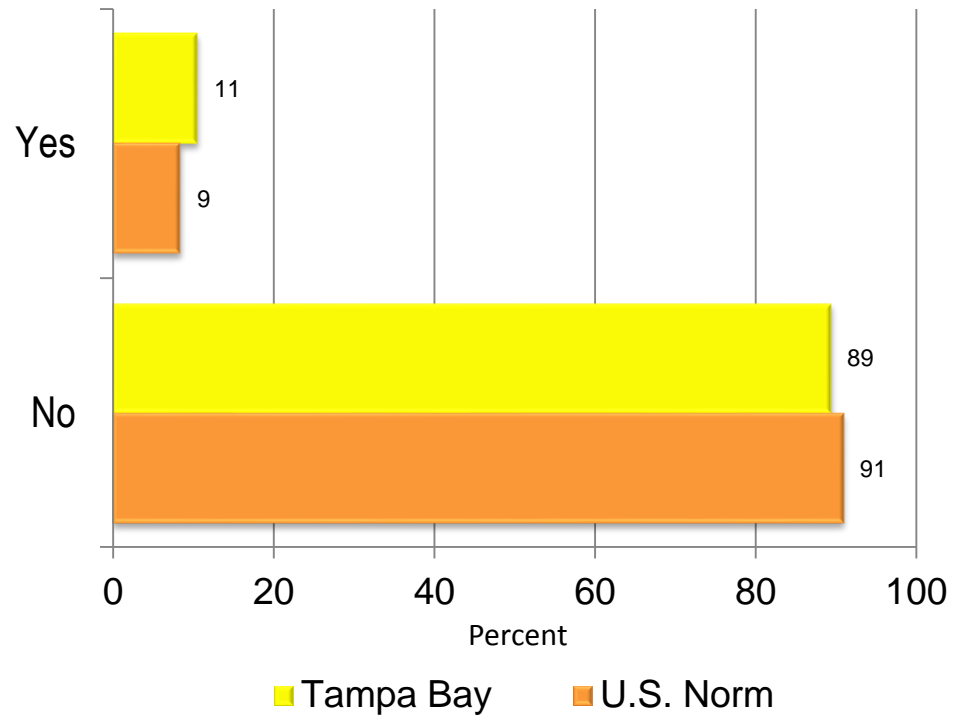
Base: Total Day Person-Trips



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:** 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