



Tampa/Hillsborough County

2015 Visitor Report

Table of Contents



Introduction	3
Research Objectives	4
Methodology	5
Key Findings	6
Size & Structure of the U.S. Travel Market	10
Size & Structure of Tampa/Hillsborough County’s Domestic Travel Market	14
Overnight Trip Detail	18
Overnight Expenditures.....	19
Overnight Trip Characteristics.....	24
Demographic Profile of Overnight Visitors	59
Day Trip Detail	70
Day Trip Expenditures.....	71
Day Trip Characteristics.....	76
Demographic Profile of Day Visitors	96
Appendix: Key Terms Defined	107

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/Hillsborough County'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 Tampa/Hillsborough County*
 - *A profile of Tampa/Hillsborough County's performance within its overnight travel market*
 - *Profiles of Tampa/Hillsborough County'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 Tampa/Hillsborough County, the following sample was achieved in 2015:
 - 3,347 trips:
 - 2,513 overnight trips
 - 834 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, Tampa/Hillsborough County had 33.1 million person trips. Of these trips, 23% were overnight trips. The rest were day trips.
- ◉ “Visiting friends and relatives” (at 48%) was the most frequent purpose for an overnight trip to Tampa/Hillsborough County. Marketable trips (those influenced by marketing efforts) were 38% of the total overnight trips. Coming for a “theme park” was the highest marketable trip purpose.
- ◉ For overnight trips, the top state markets were Florida, New York, Massachusetts, and Georgia. Among DMAs, the top three visitor sources were New York, Tampa, and Orlando.

Key Findings



- Two-thirds (66%) of visitors, were very satisfied with the overall trip experience. All satisfaction elements were less than the national average.
- Of the overnight respondents, 81% have visited Tampa/Hillsborough County at least once. Sixty-seven (67%) percent had visited in the past year.
- Similar to the national average, nearly half (49%) of the overnight trips were planned 2 months or less before the trip. Less than the national average, ten percent (10%) did not plan anything in advance.
- “Online travel agencies,” “airline/commercial carrier,” and “hotel or resort” were the most common planning sources for an overnight trip. “Airline/commercial carrier” was the most common booking source.

Key Findings – (Cont'd)



- The average number of nights spent in Tampa/Hillsborough County for an overnight trip was 2.9 nights, up from 2.6 nights in 2014. The average travel party size was 2.8 persons.
- The top five overnight trip activities and experiences were “Shopping,” “Beach/Waterfront,” “Swimming,” “Fine Dining,” and “Theme Park.”
- The highest social media activities on an overnight trip to Tampa/Hillsborough County 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 remained unchanged from 2014.

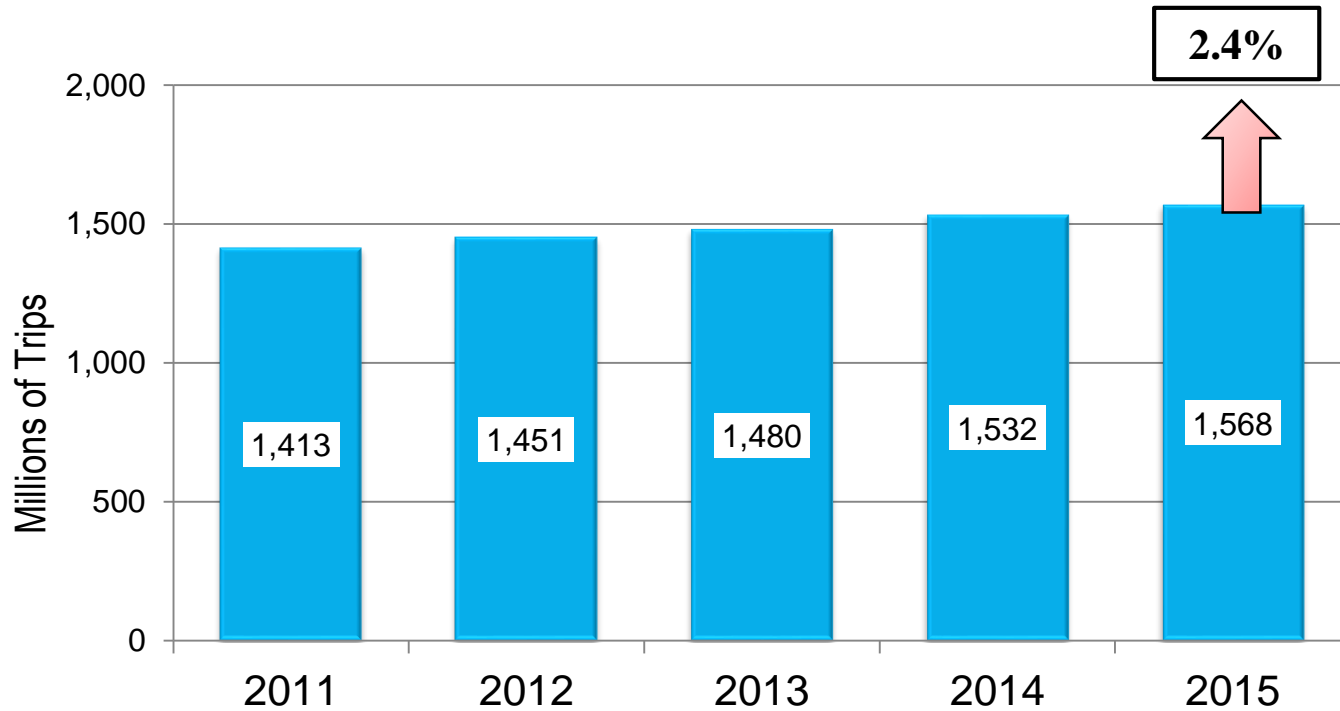


Size & Structure of the U.S. Travel Market

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



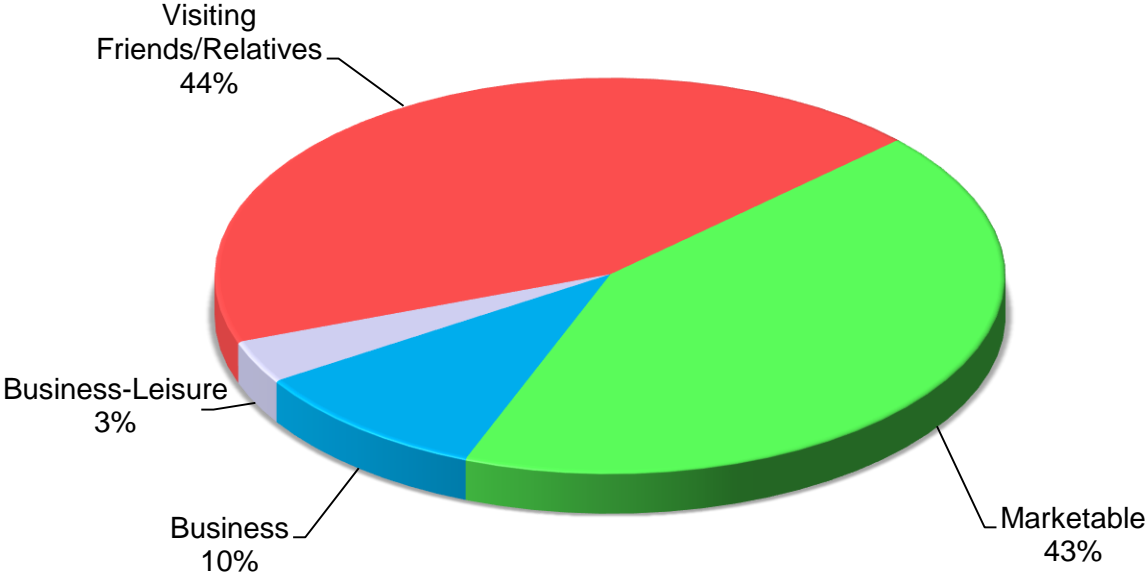
Base: Total Overnight Person-Trips



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



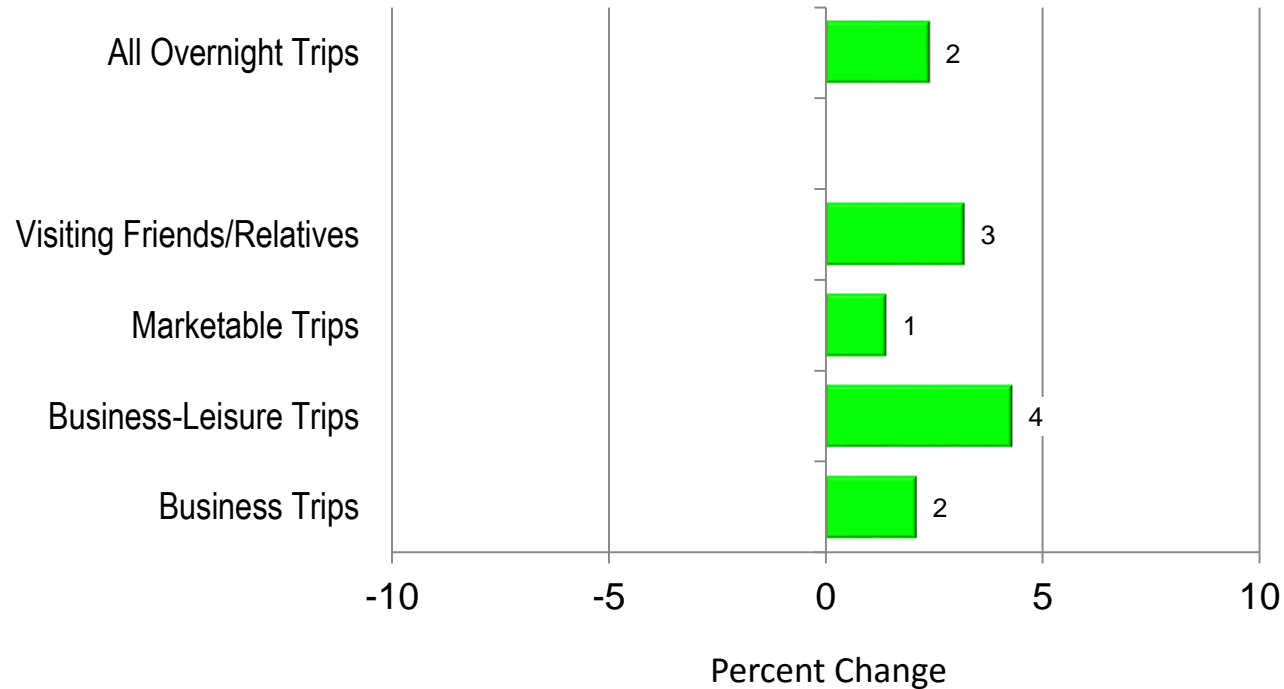
Base: Total Overnight Person-Trips



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



Base: Total Overnight Person-Trips



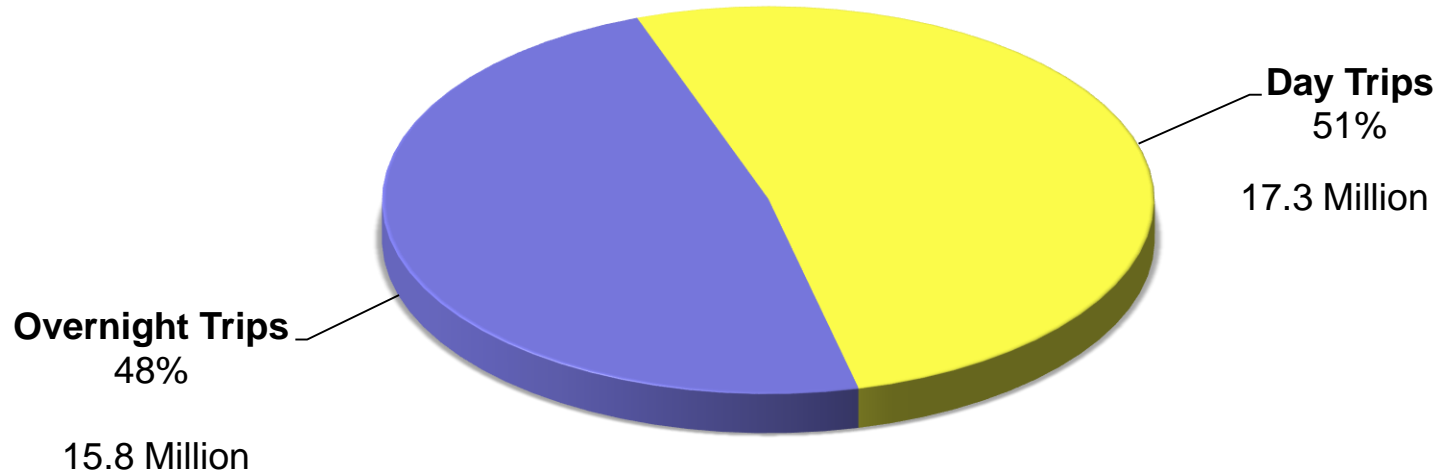


Size & Structure of Tampa/ Hillsborough County Domestic Travel Market

Total Size of Tampa/Hillsborough Domestic Travel Market in 2015



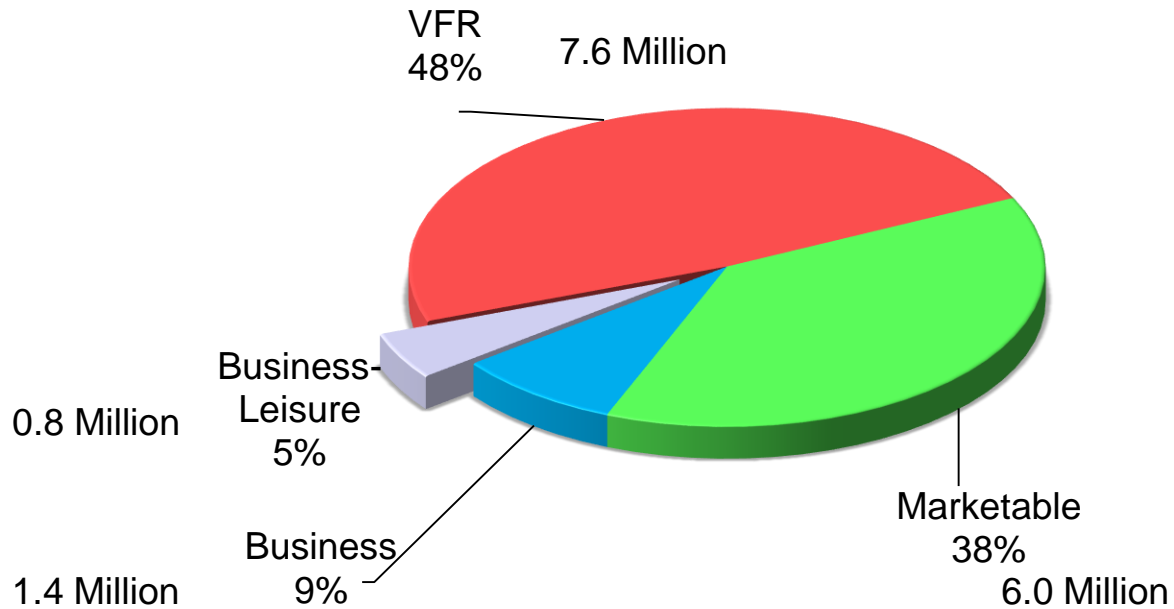
Total Person-Trips = 33.1 Million



Tampa/Hillsborough County Overnight Travel Market – by Main Trip Purpose



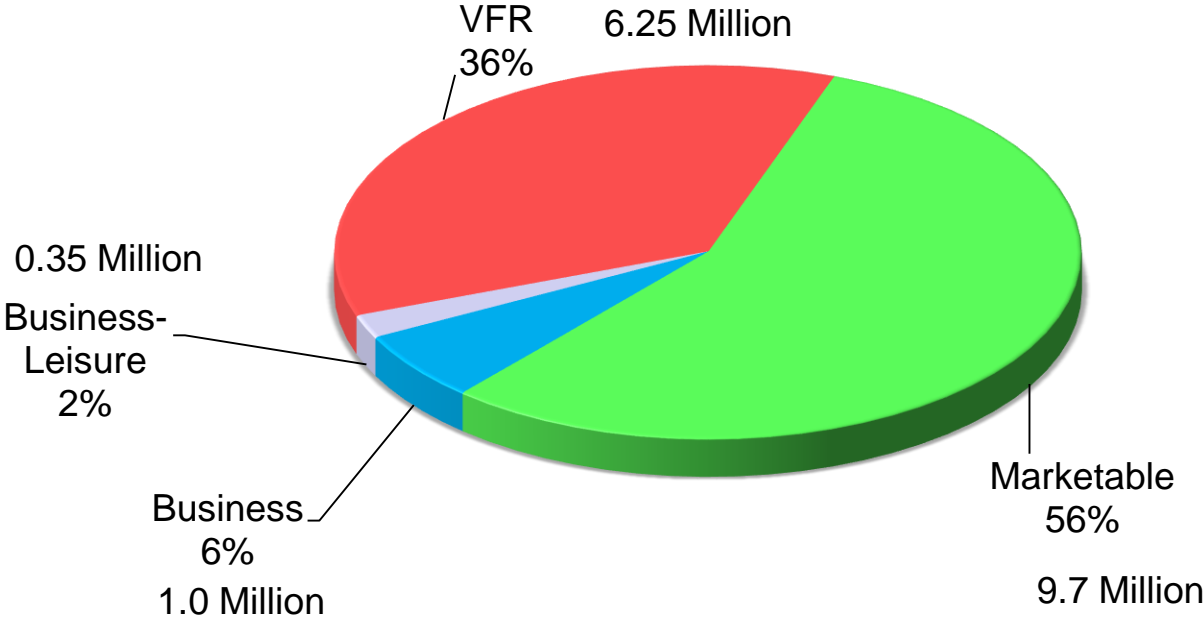
Adult Overnight Person-Trips = 15.8 Million



Tampa/Hillsborough County Day Travel Market – by Trip Purpose



Adult Day Person-Trips = 17.3 Million





Overnight Trip Detail

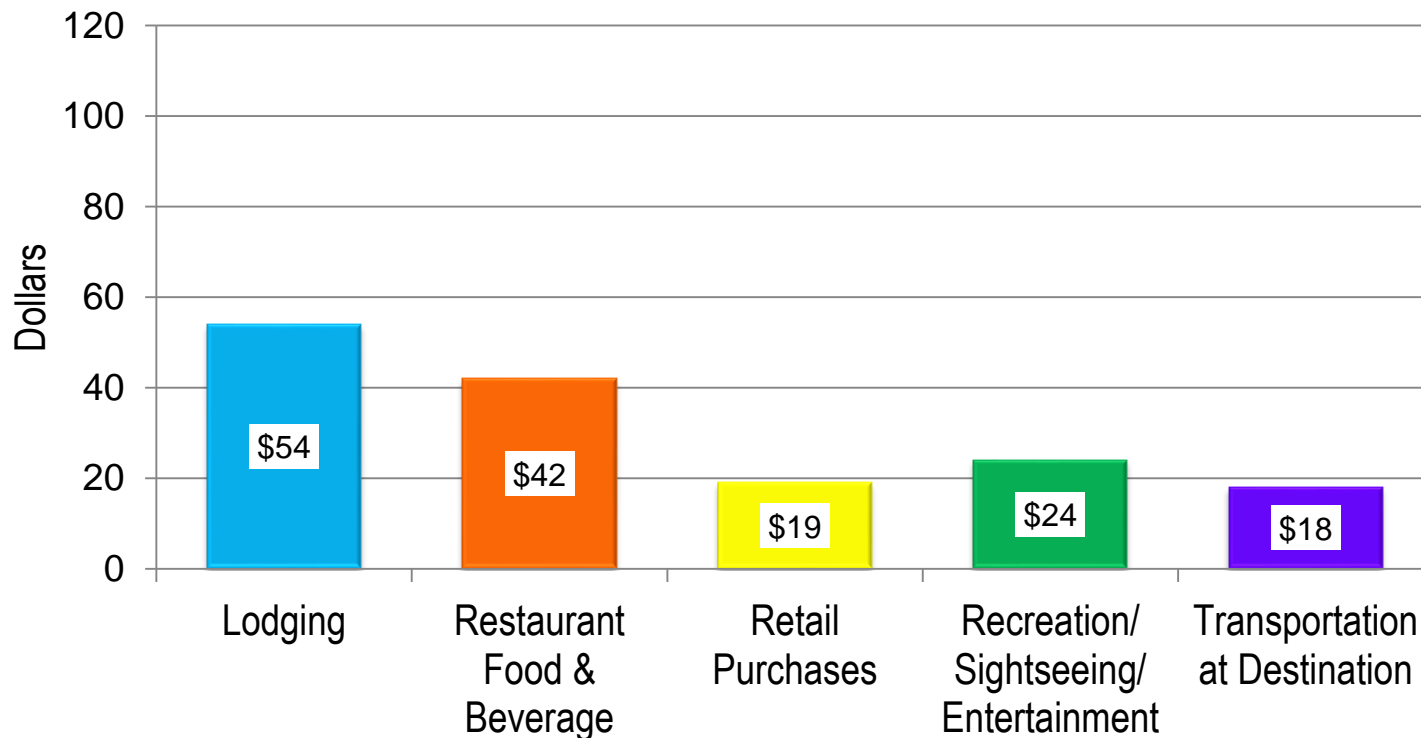


Overnight Trip Expenditures

Average Per Person Expenditures on Domestic Overnight Trips – By Sector



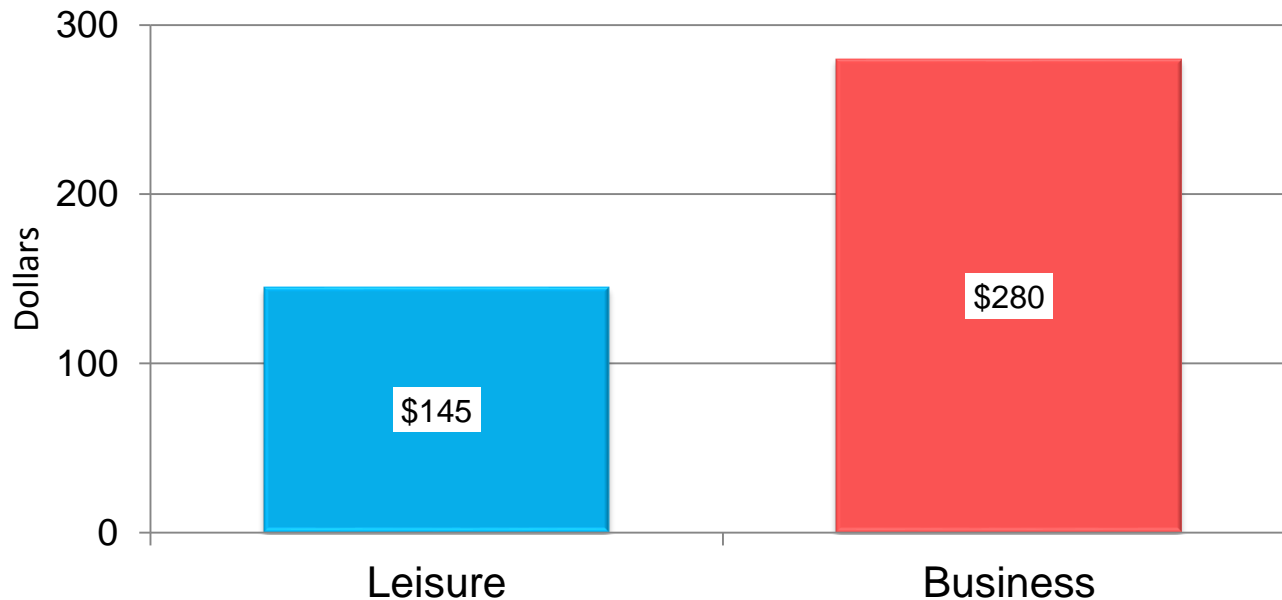
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



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



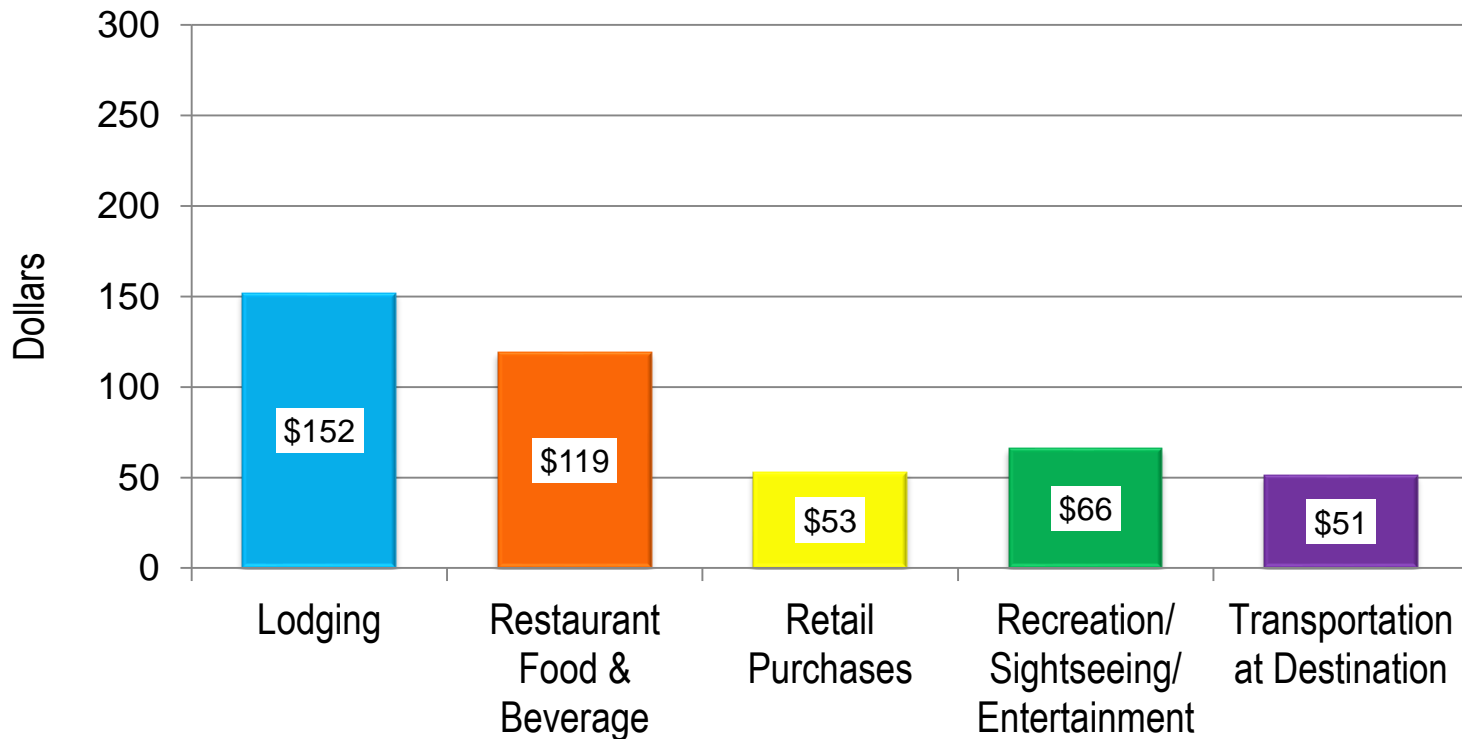
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Average Per Party Expenditures on Domestic Overnight Trips – By Sector



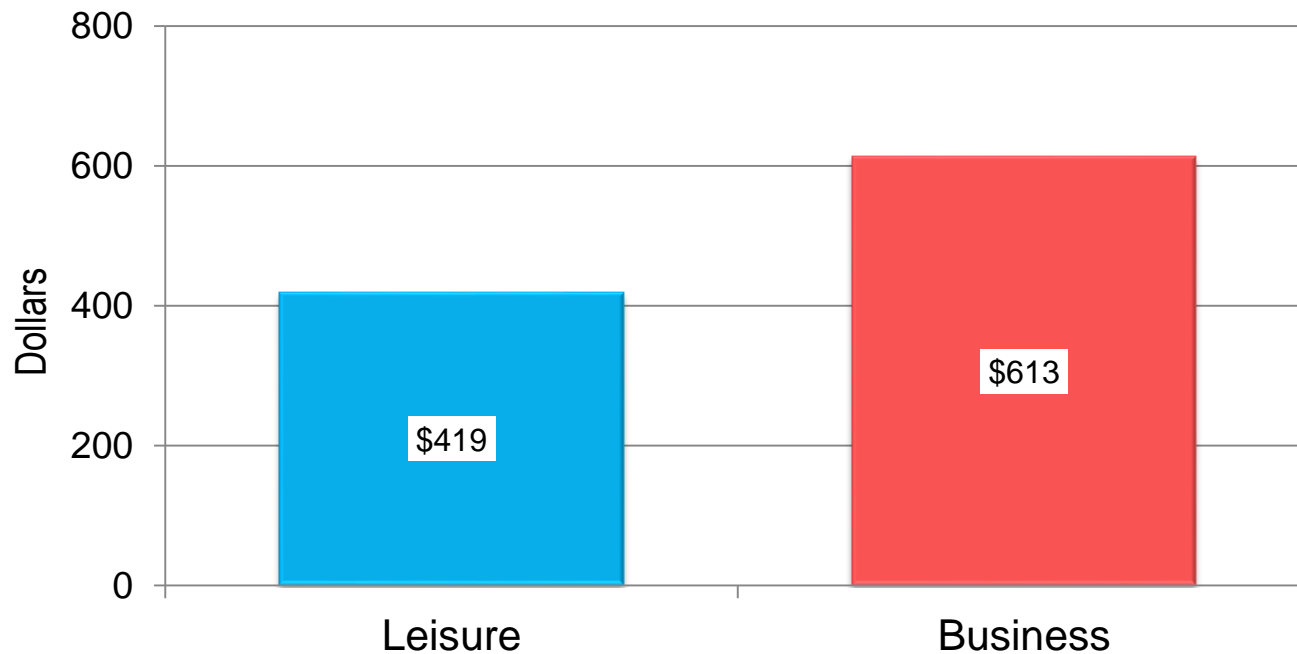
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



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



Base: Total Overnight Person-Trips to Tampa/Hillsborough County



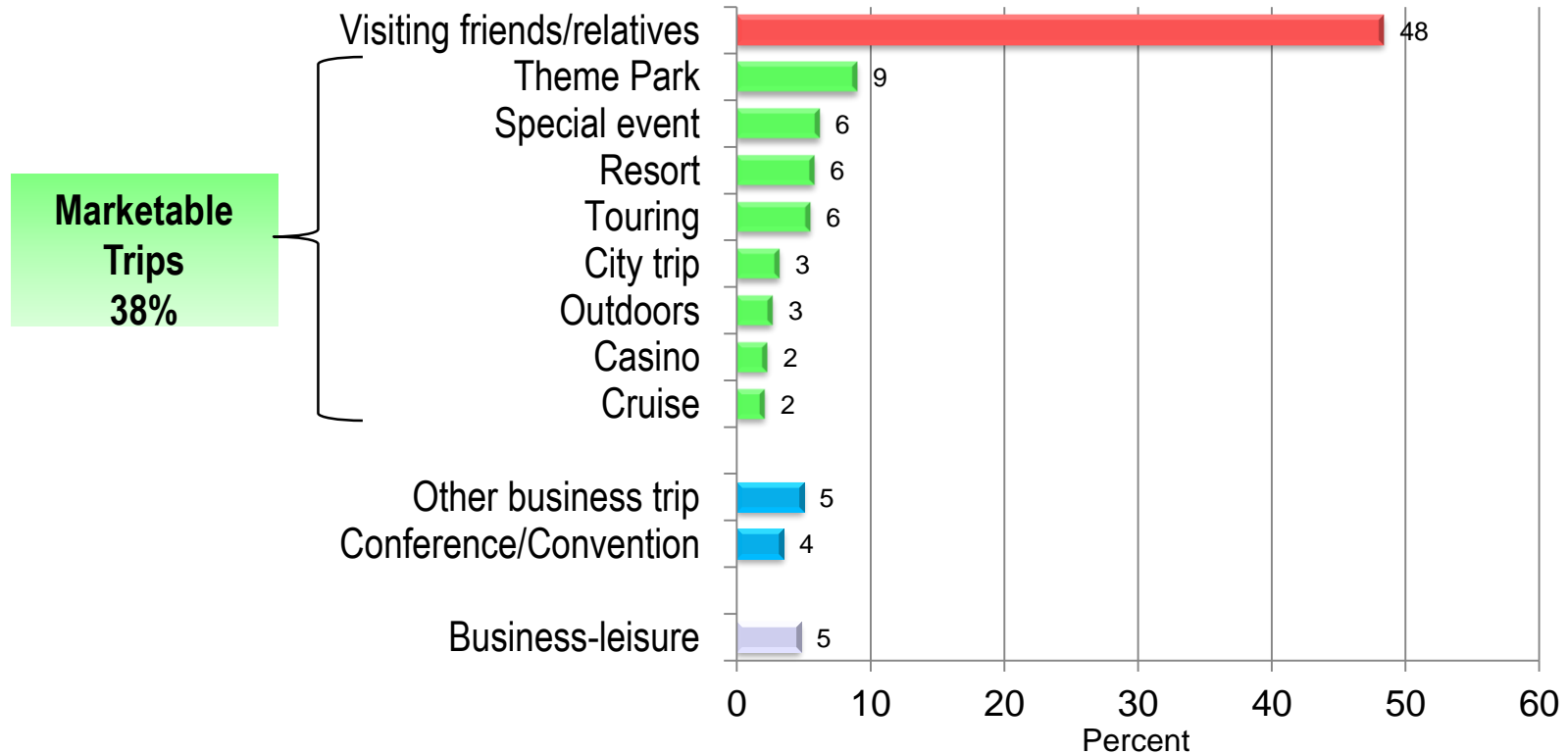


Overnight Trip Characteristics

Main Purpose of Trip



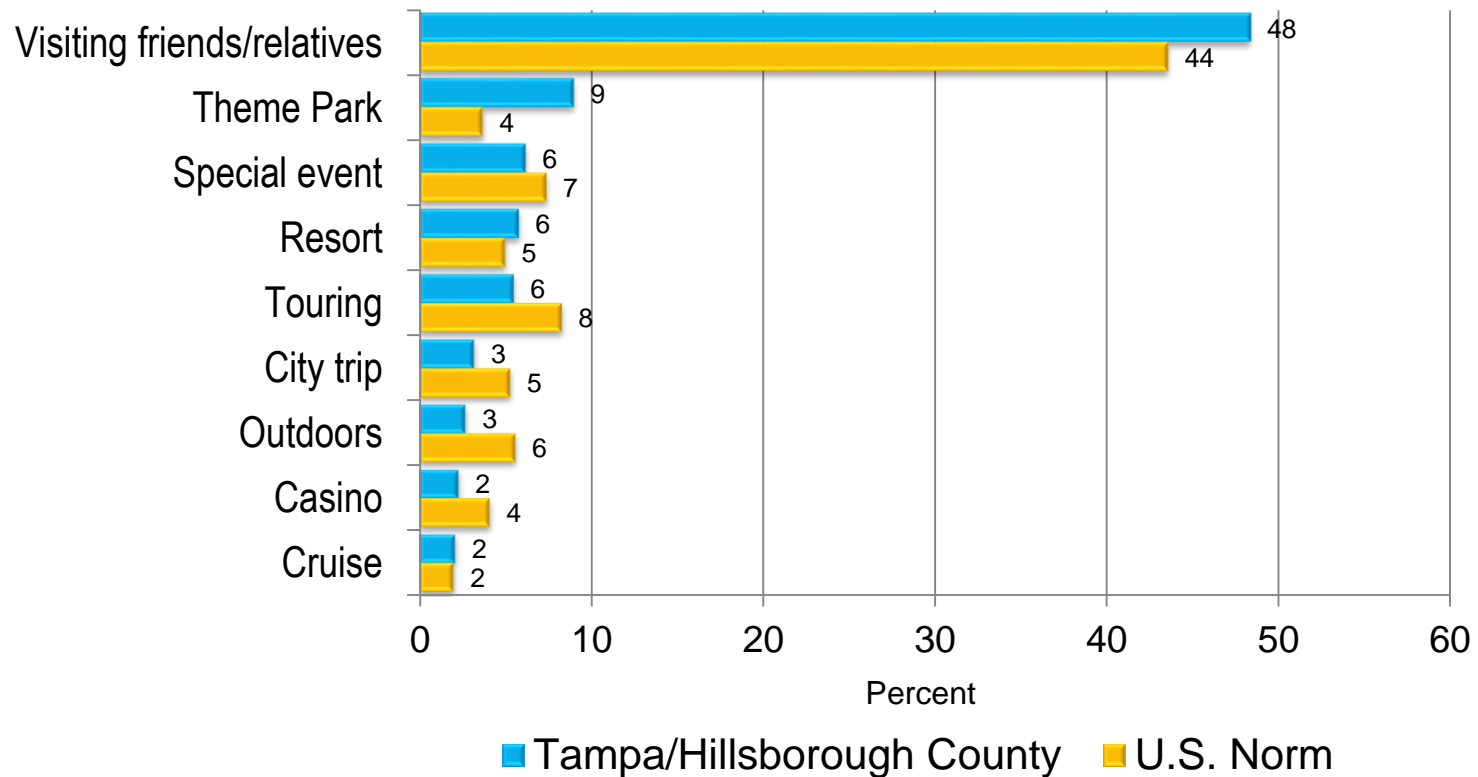
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Main Purpose of Leisure Trip – Tampa/Hillsborough County vs. National Norm



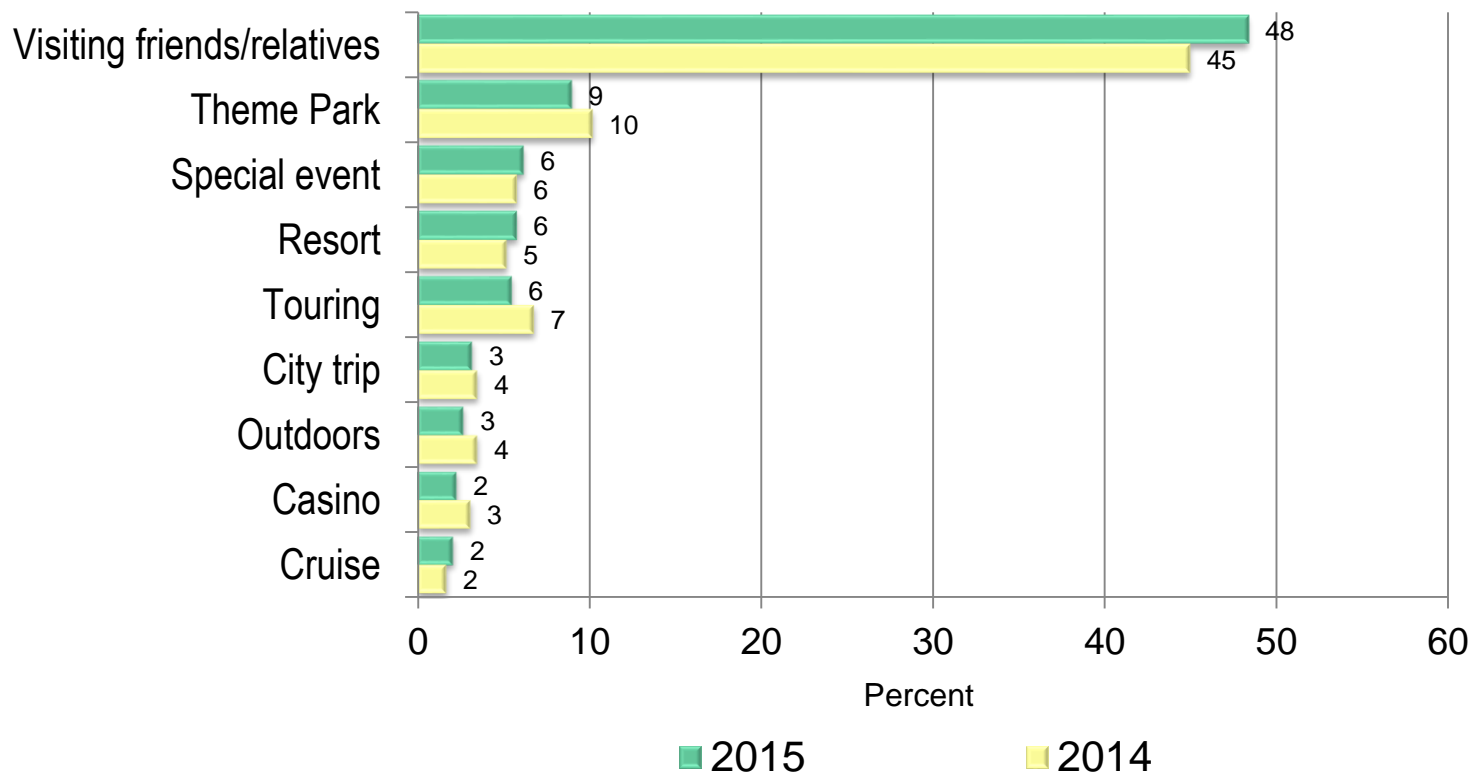
Base: Total Overnight Person-Trips



Main Purpose of Overnight Leisure Trip to Tampa/Hillsborough County — 2015 vs. 2014



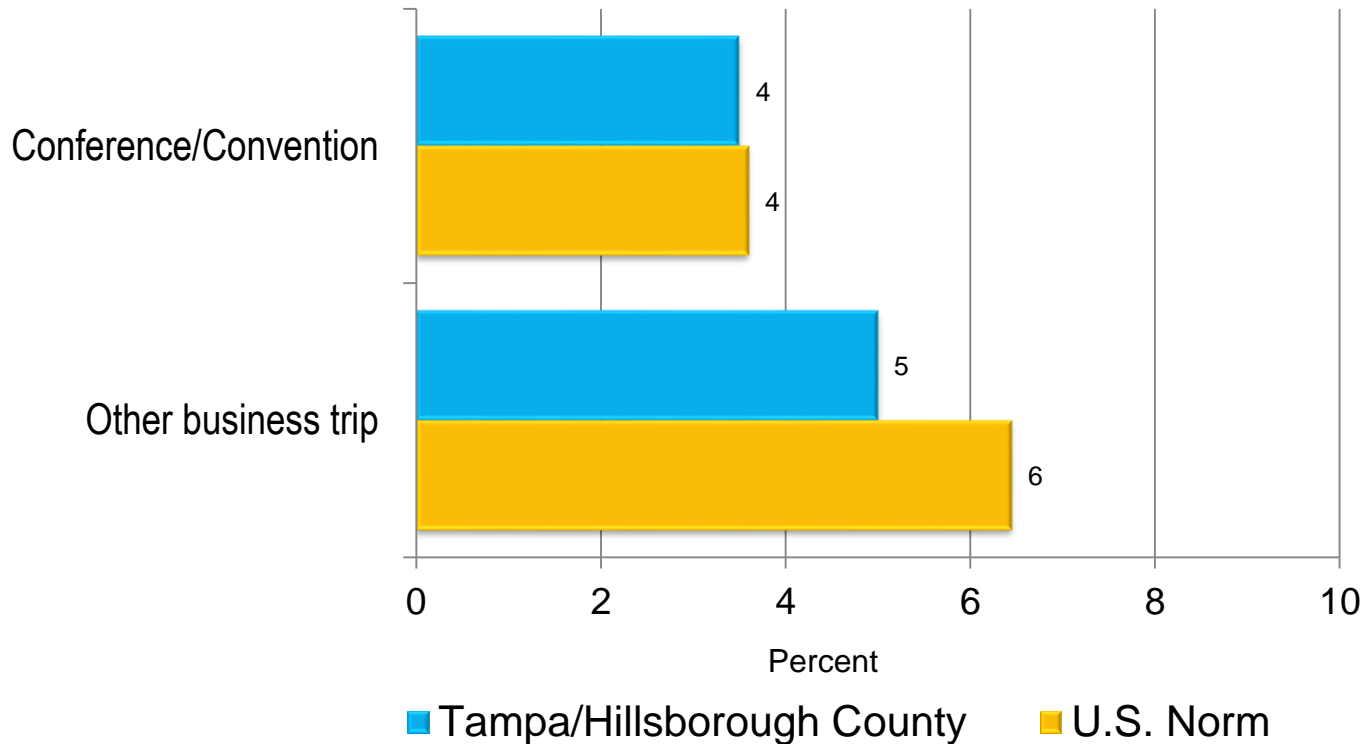
Base: Total Overnight Person-Trips



Main Purpose of Business Trip – Tampa/Hillsborough County vs. National Norm



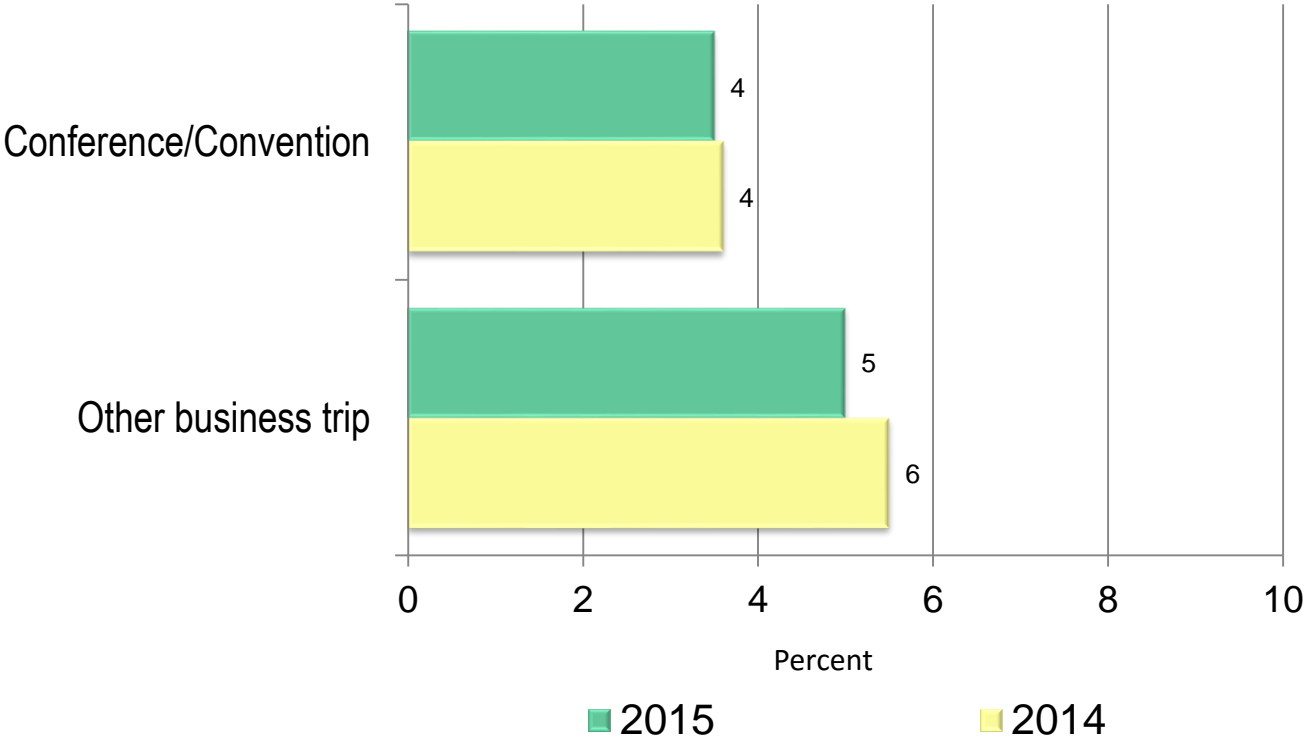
Base: Total Overnight Person-Trips



Main Purpose of Overnight Business Trip to Tampa/Hillsborough County — 2015 vs. 2014



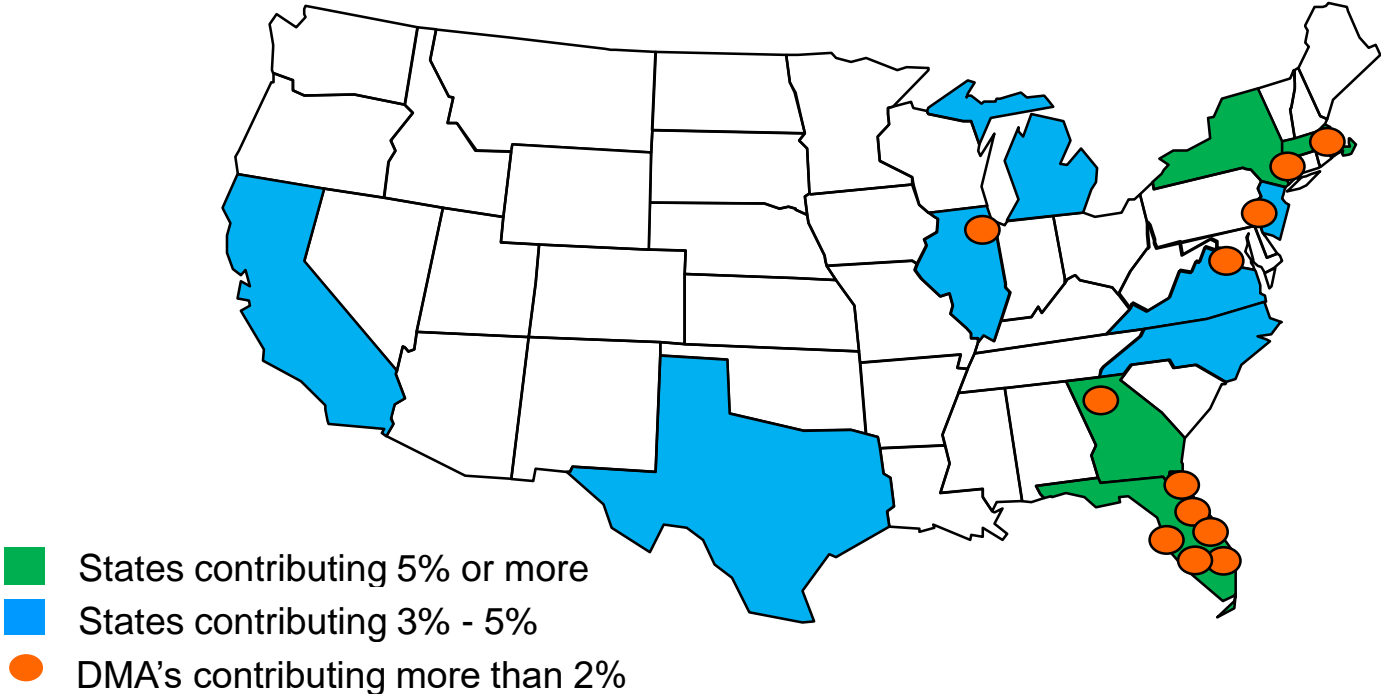
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Sources of Business



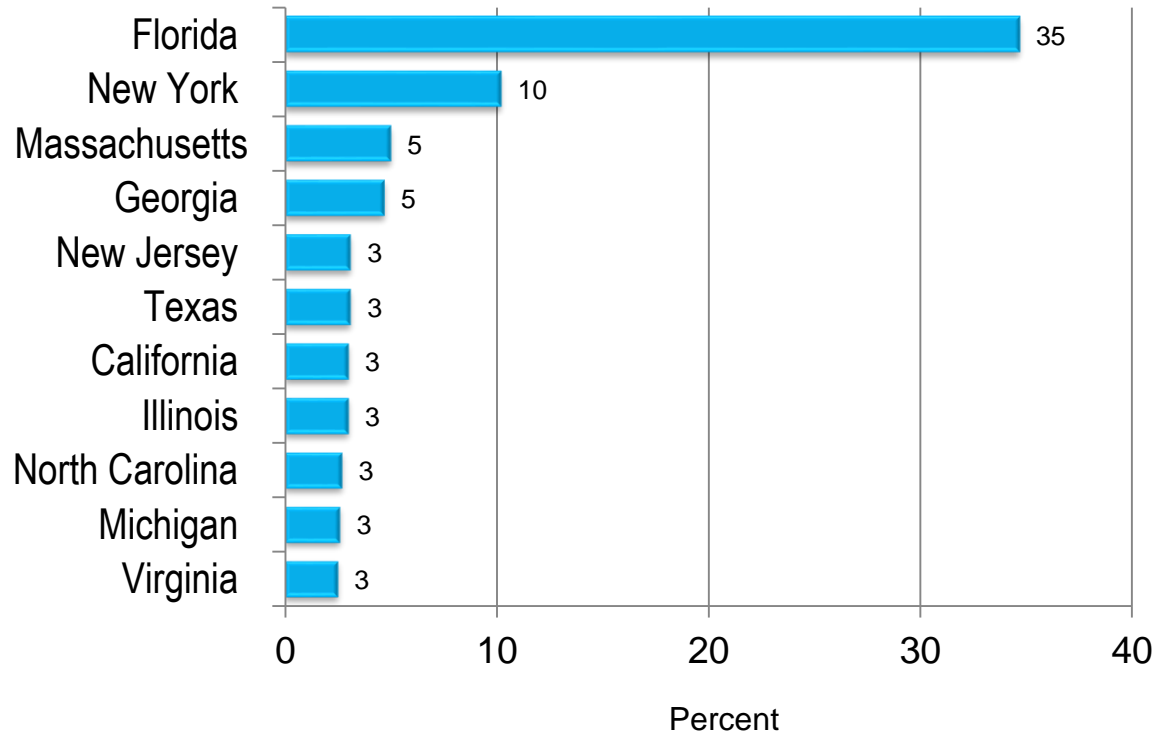
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



State Origin Of Trip



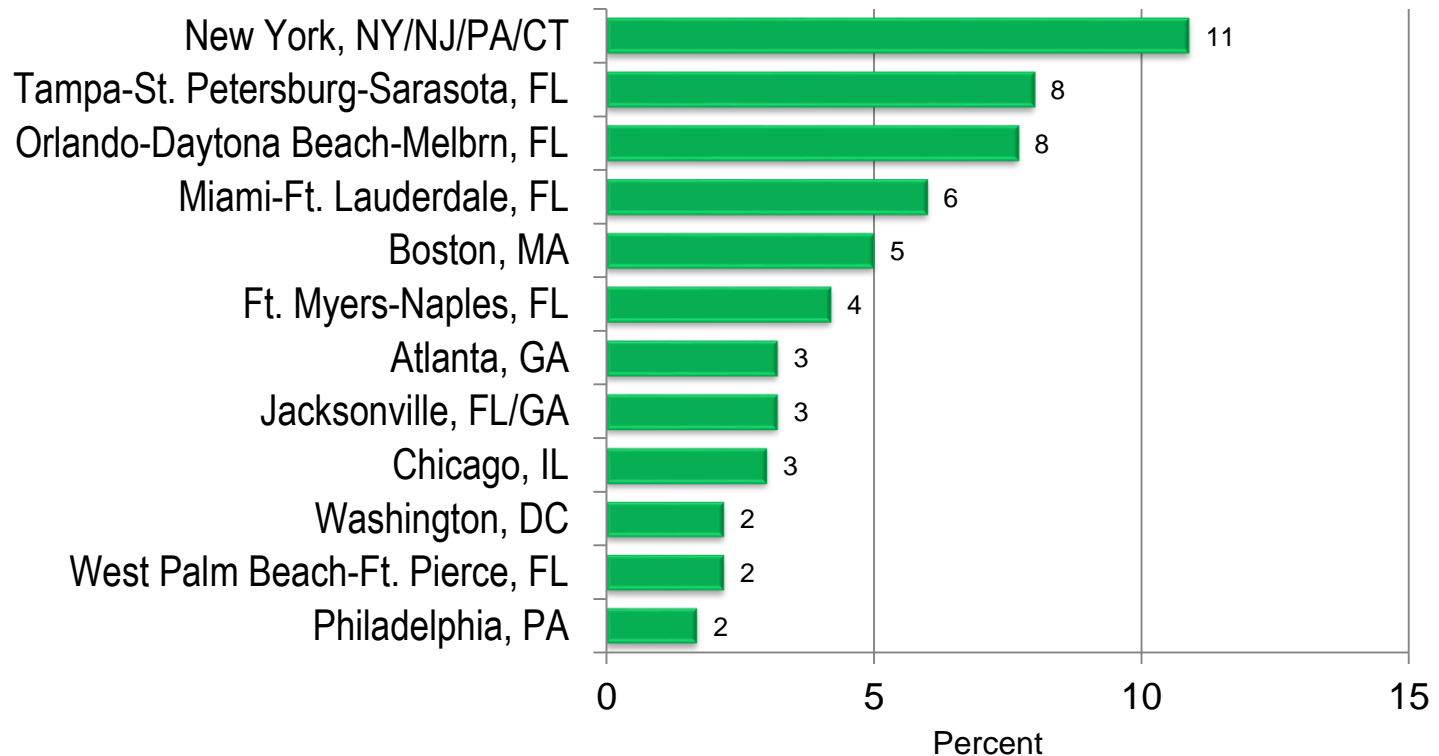
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



DMA Origin Of Trip



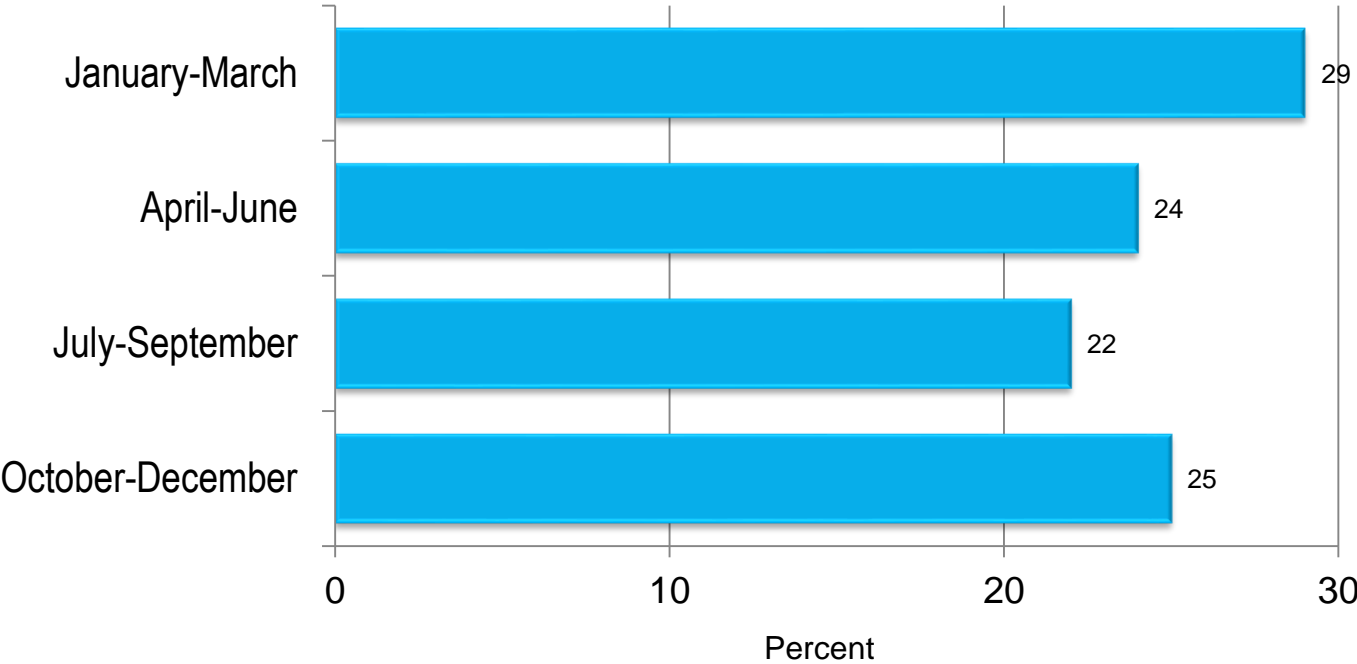
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Season of Trip



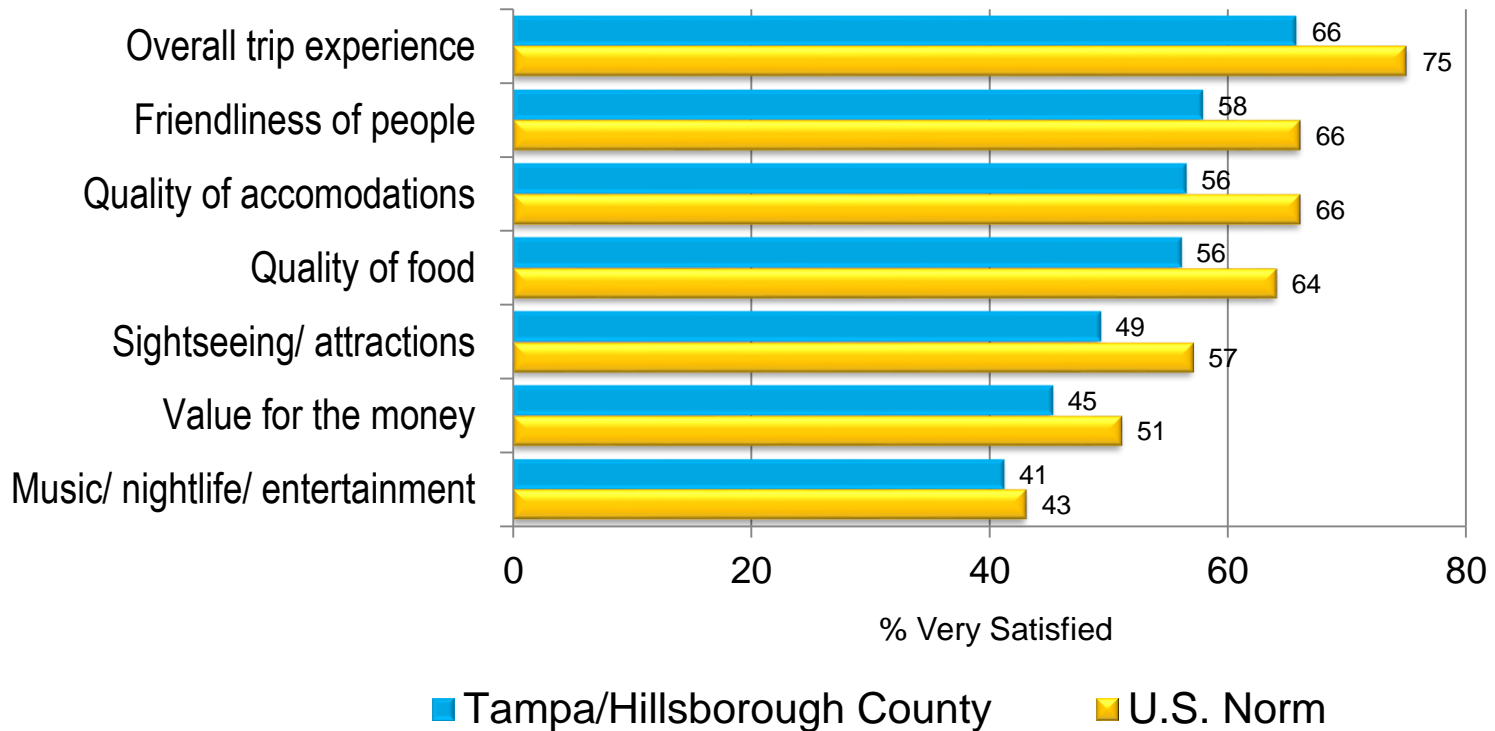
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Satisfaction with Tampa/Hillsborough County Trip - % Very Satisfied



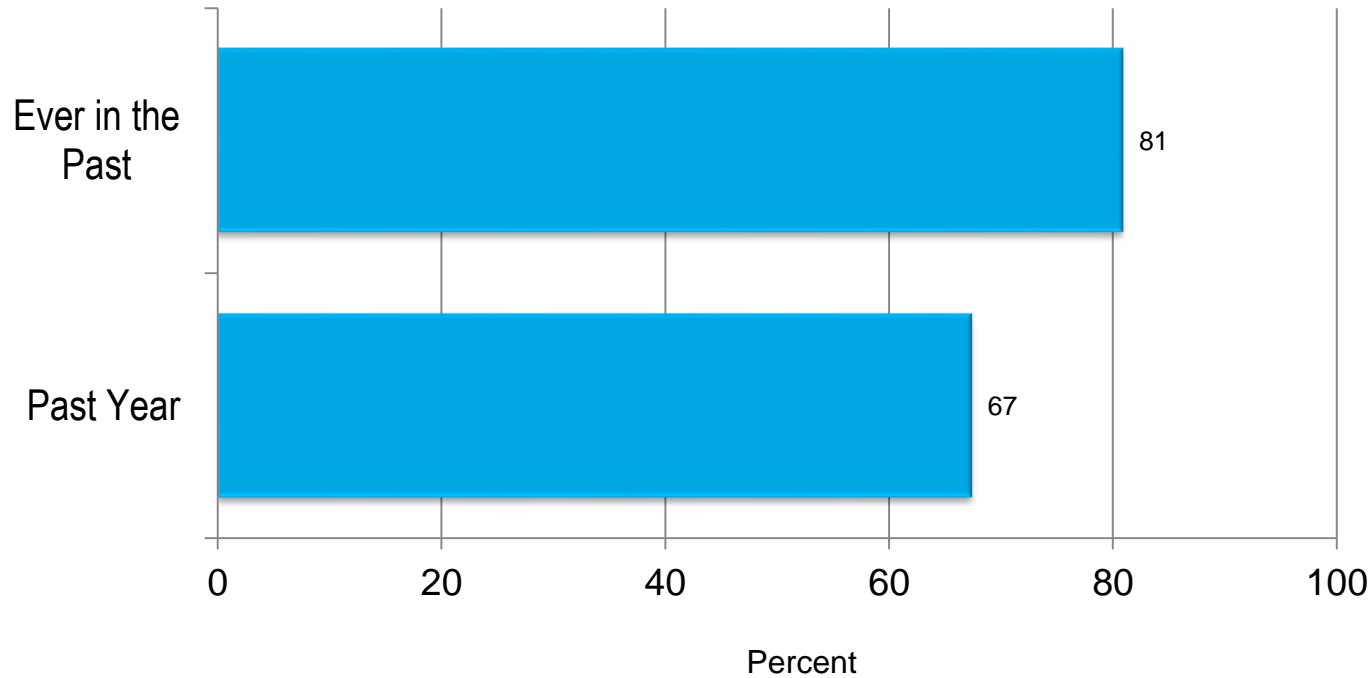
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Past Visitation to Tampa/Hillsborough County



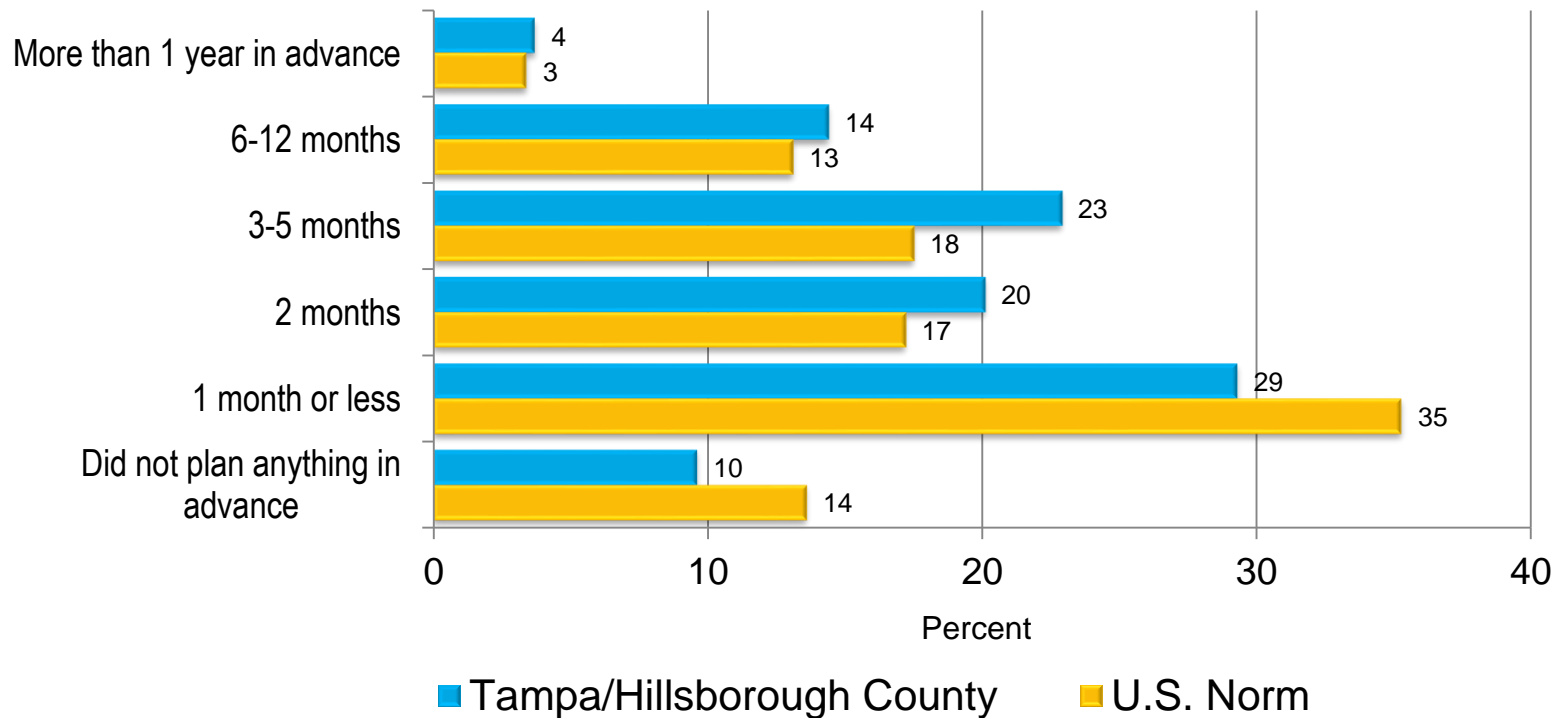
Base: Total Overnight Person-Trips to Tampa/Hillsborough County



Length of Trip Planning



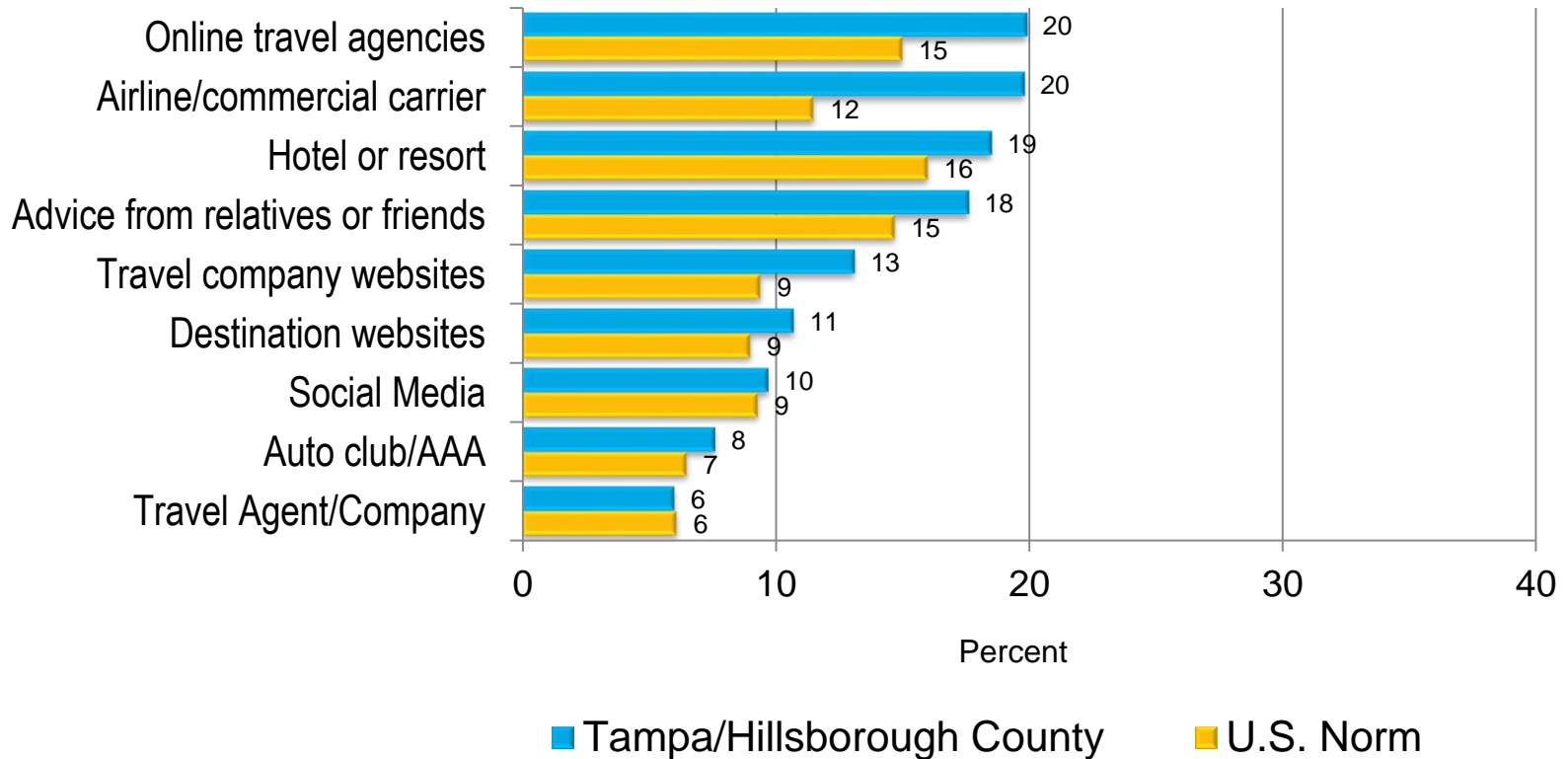
Base: Total Overnight Person-Trips



Trip Planning Information Sources



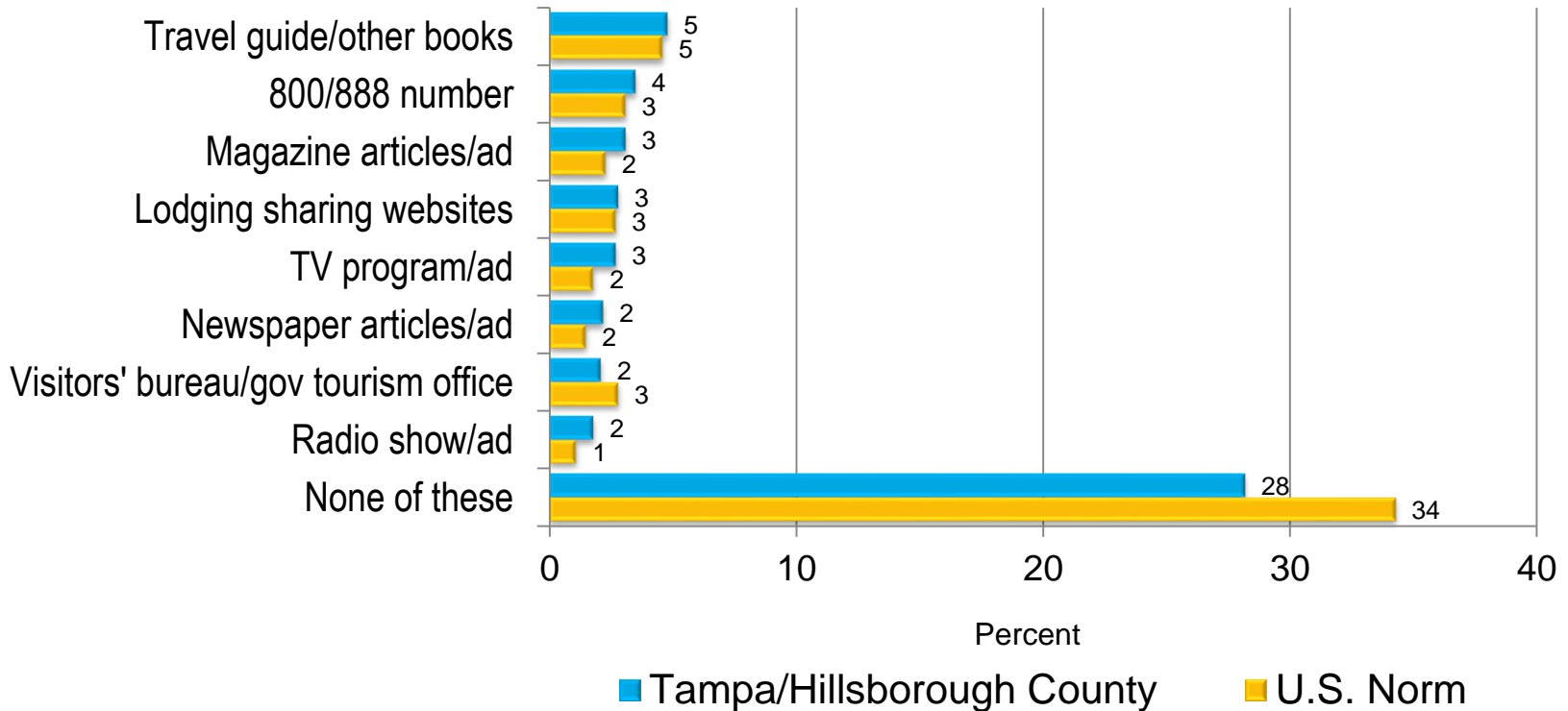
Base: Total Overnight Person-Trips



Trip Planning Information Sources (Cont'd)



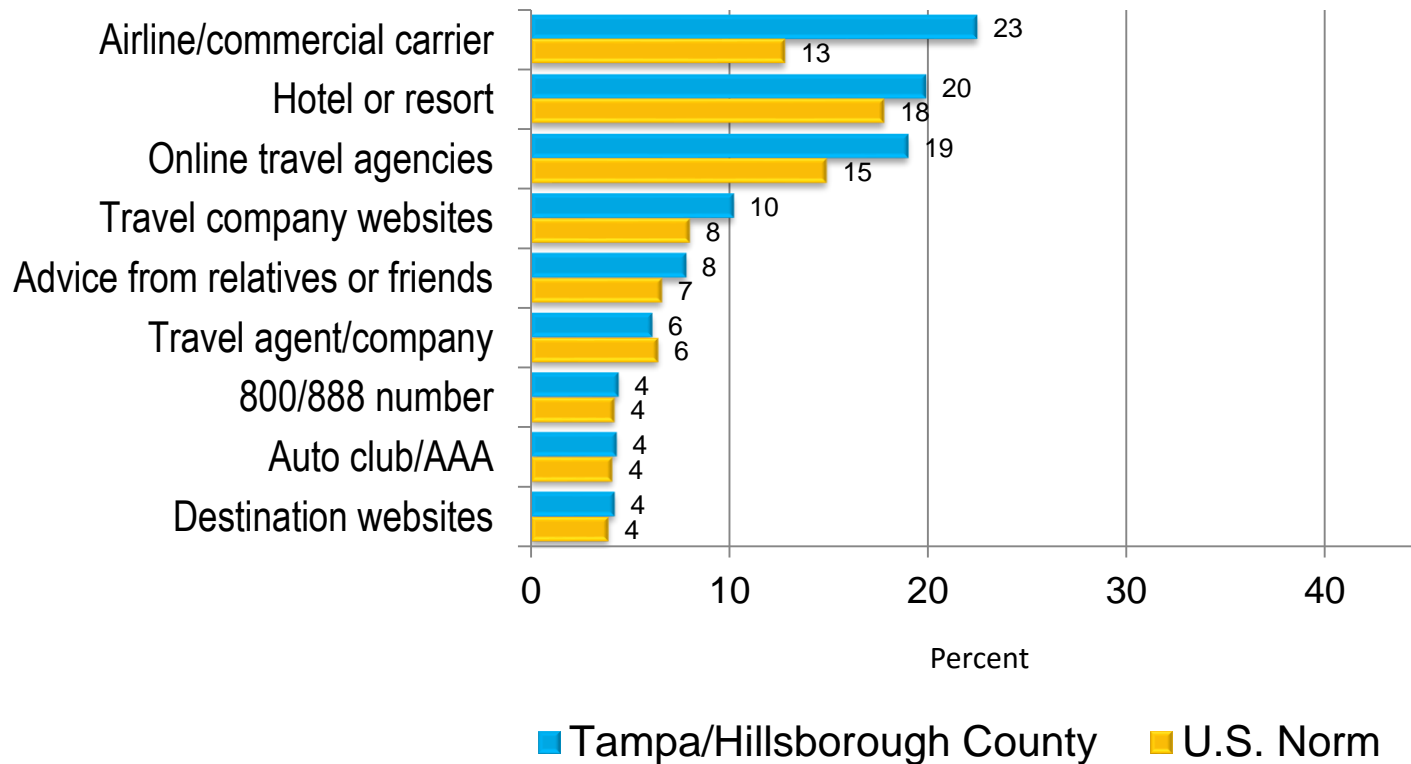
Base: Total Overnight Person-Trips



Method of Booking



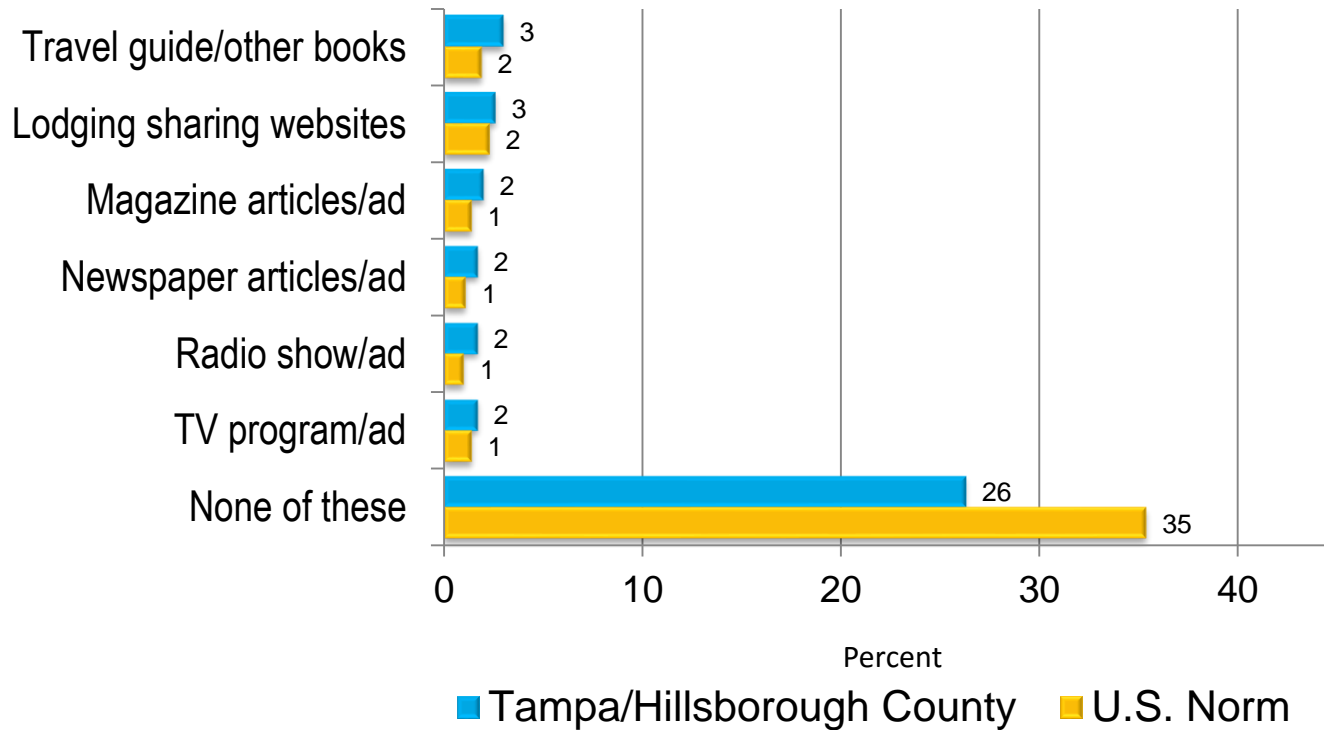
Base: Total Overnight Person-Trips



Method of Booking (Cont'd)



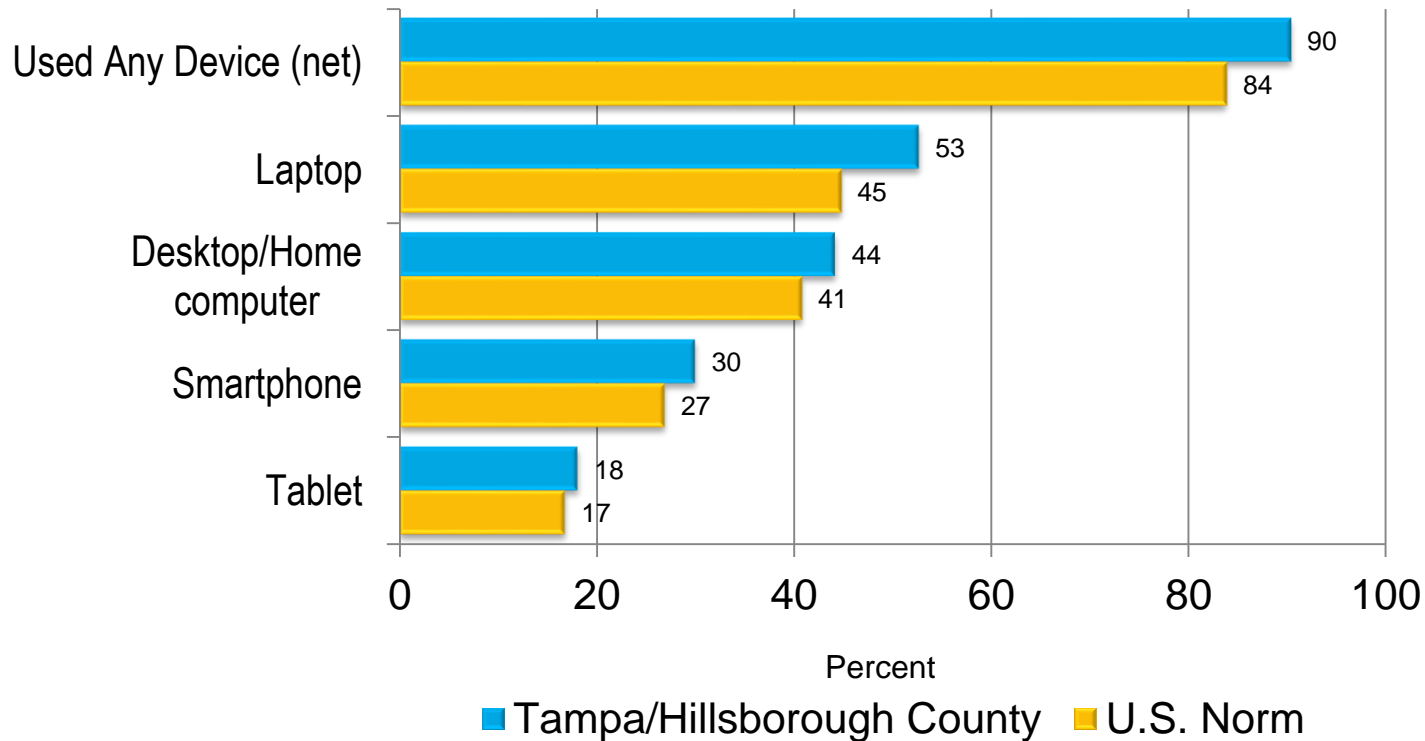
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



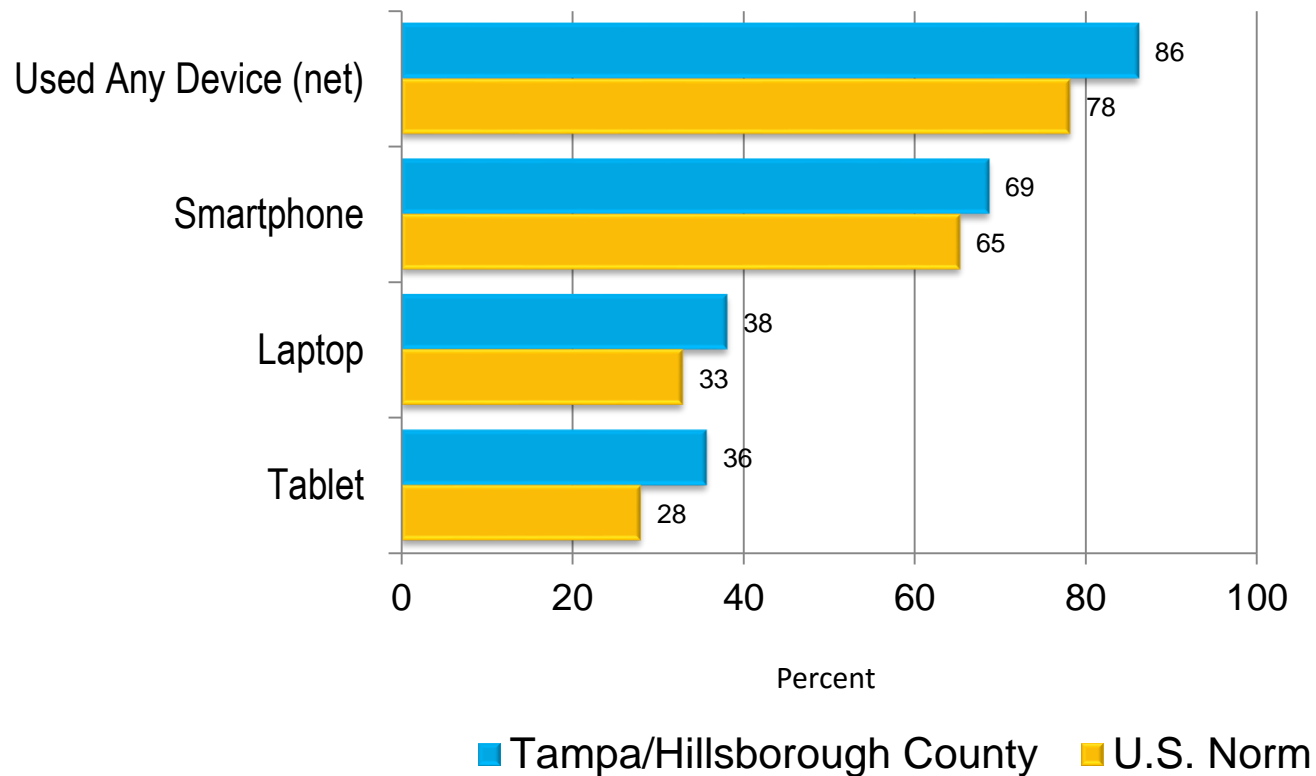
Base: Total Overnight Person-Trips



Devices Used During Trip



Base: Total Overnight Person-Trips



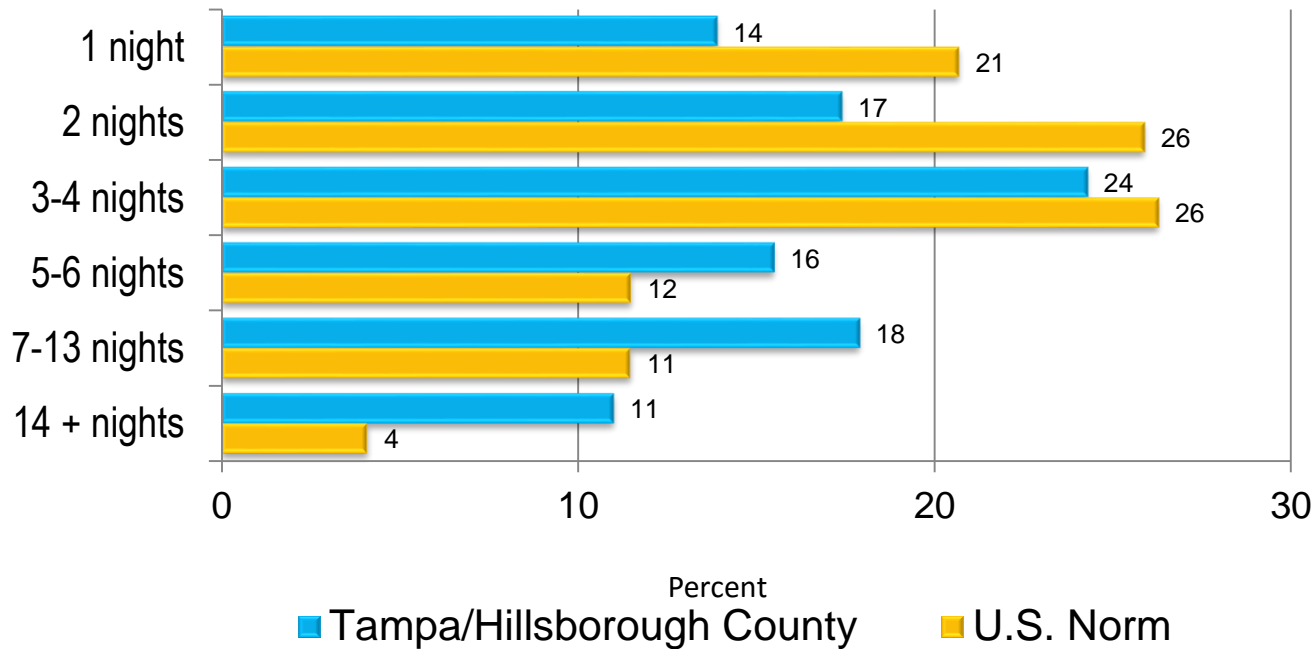
Total Nights Away on Trip



Base: Total Overnight Person-Trips

Average Tampa/Hillsborough County
6.1 nights

Average U.S. Norm
4.0 nights

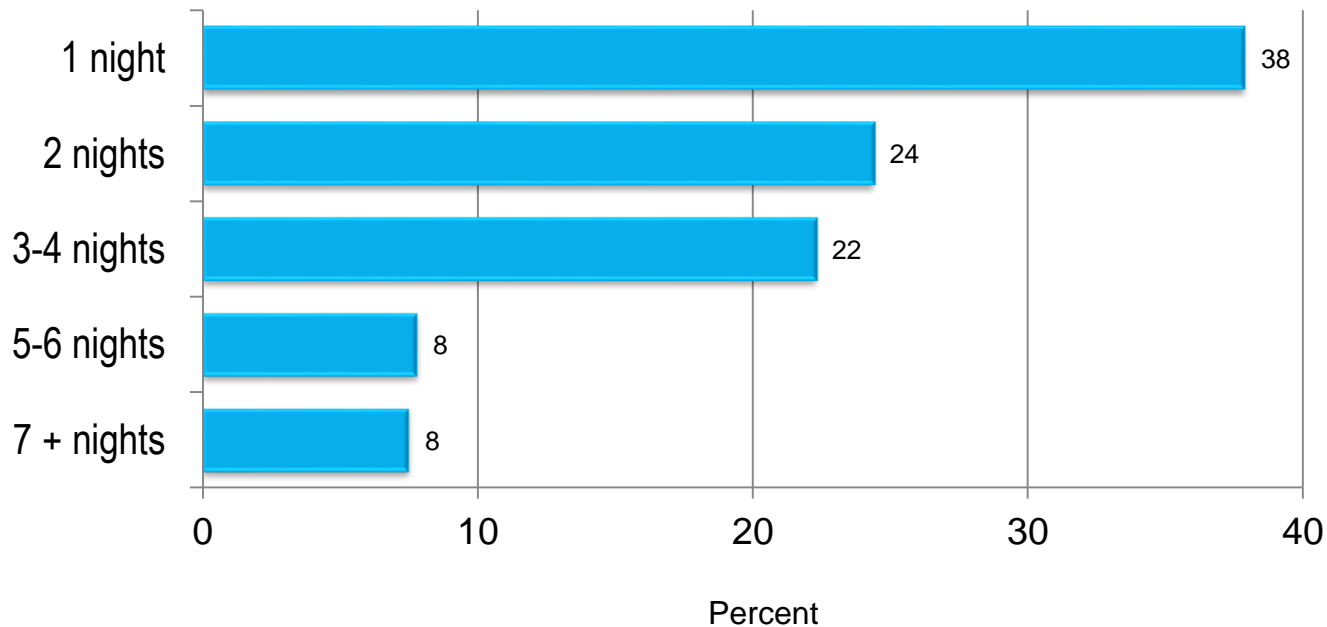


Number of Nights Spent in Tampa/Hillsborough County



Base: Overnight Person-Trips with 1+ Nights Spent In Tampa/Hillsborough County

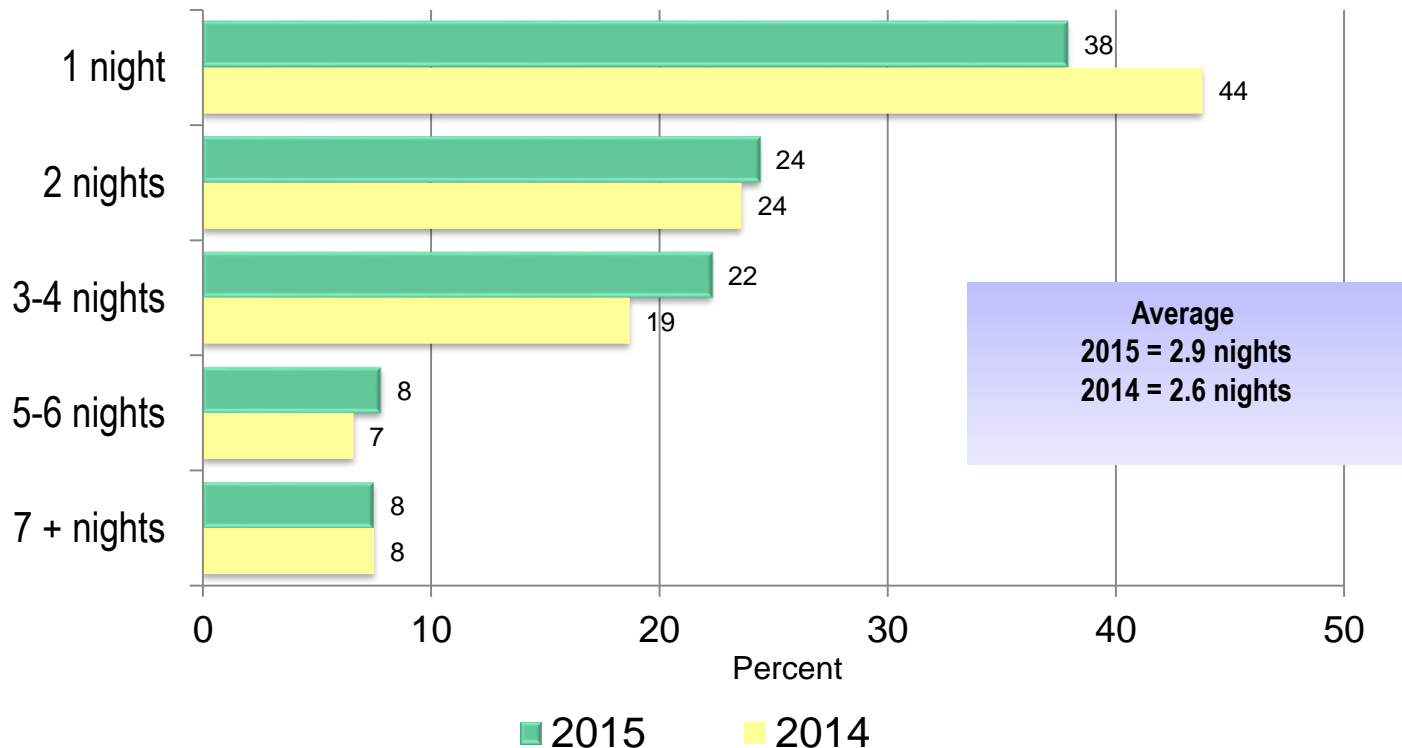
Average Nights Spent in Tampa/Hillsborough County = 2.9



Number of Nights Spent in Tampa/Hillsborough County 2015 vs. 2014



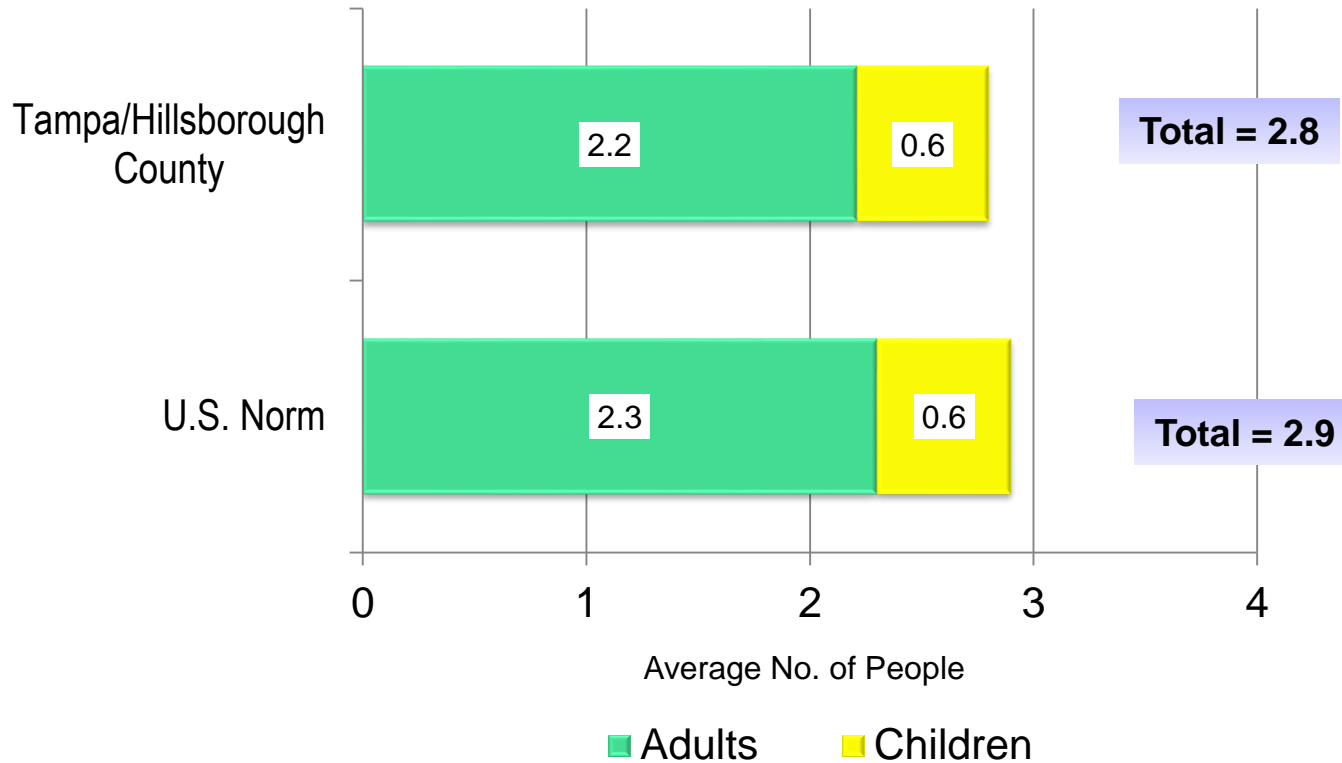
Base: Overnight Person-Trips with 1+ Nights Spent In Tampa/Hillsborough County



Size of Travel Party



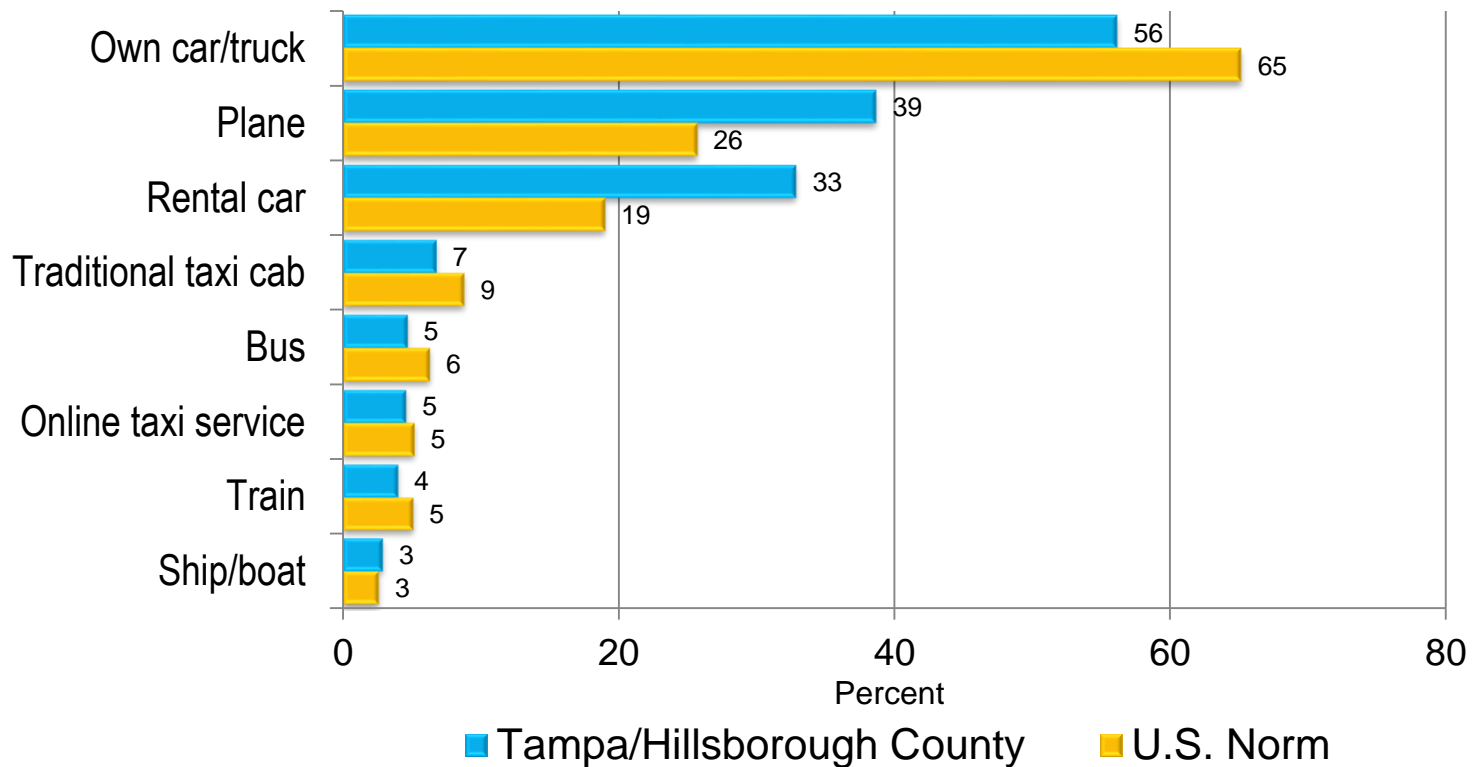
Base: Total Overnight Person-Trips



Transportation



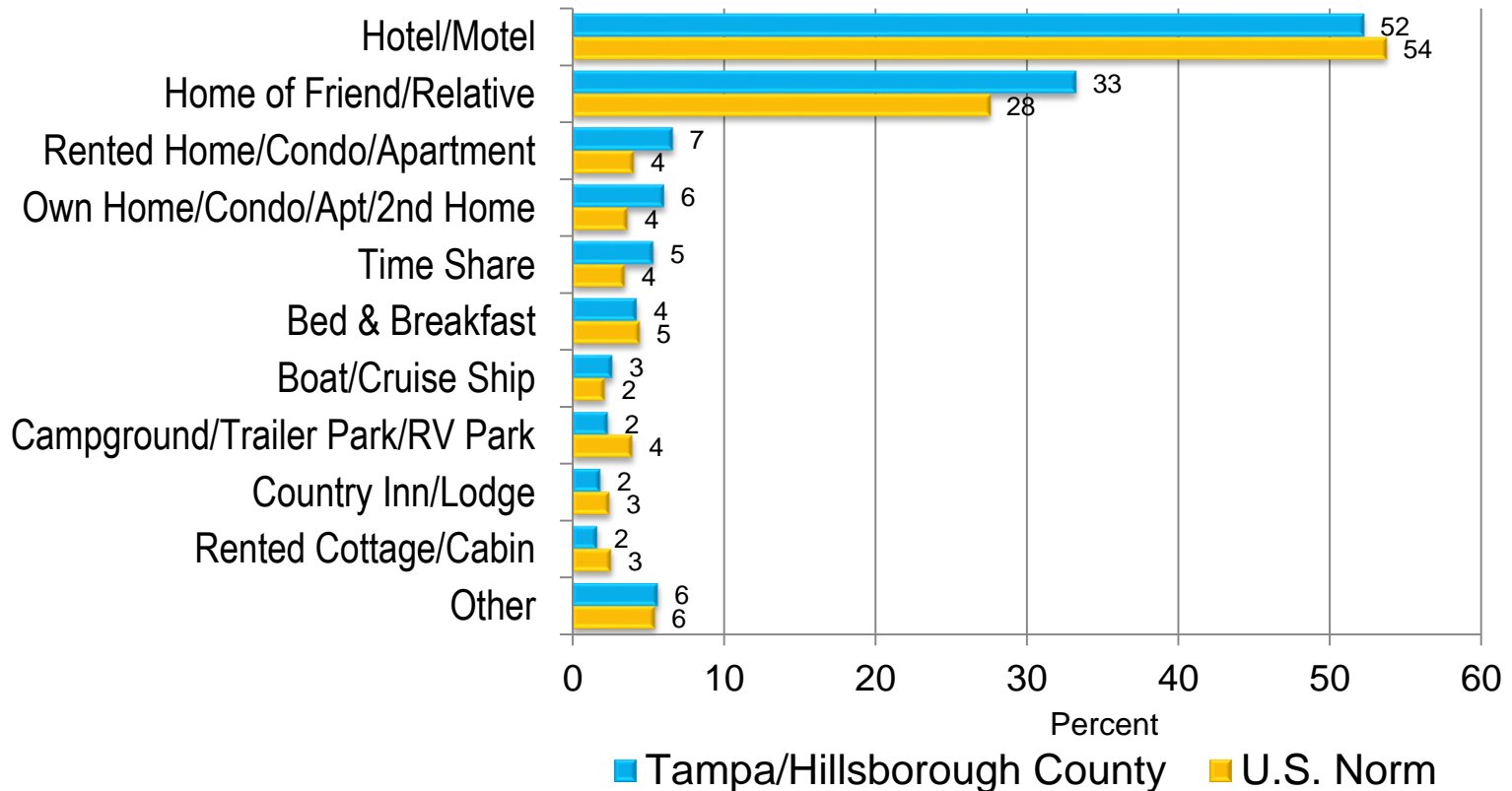
Base: Total Overnight Person-Trips



Accommodations



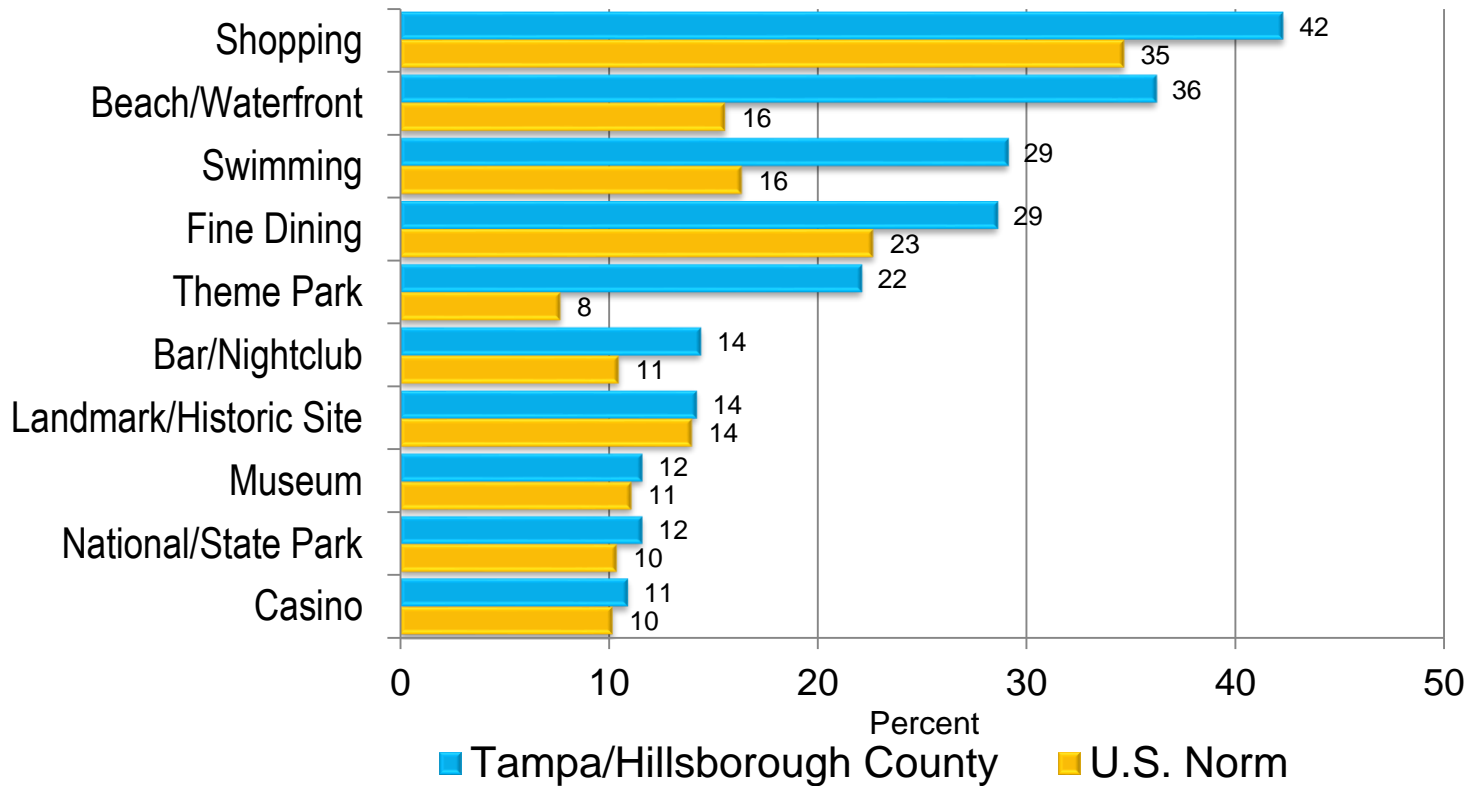
Base: Total Overnight Person-Trips



Activities and Experiences



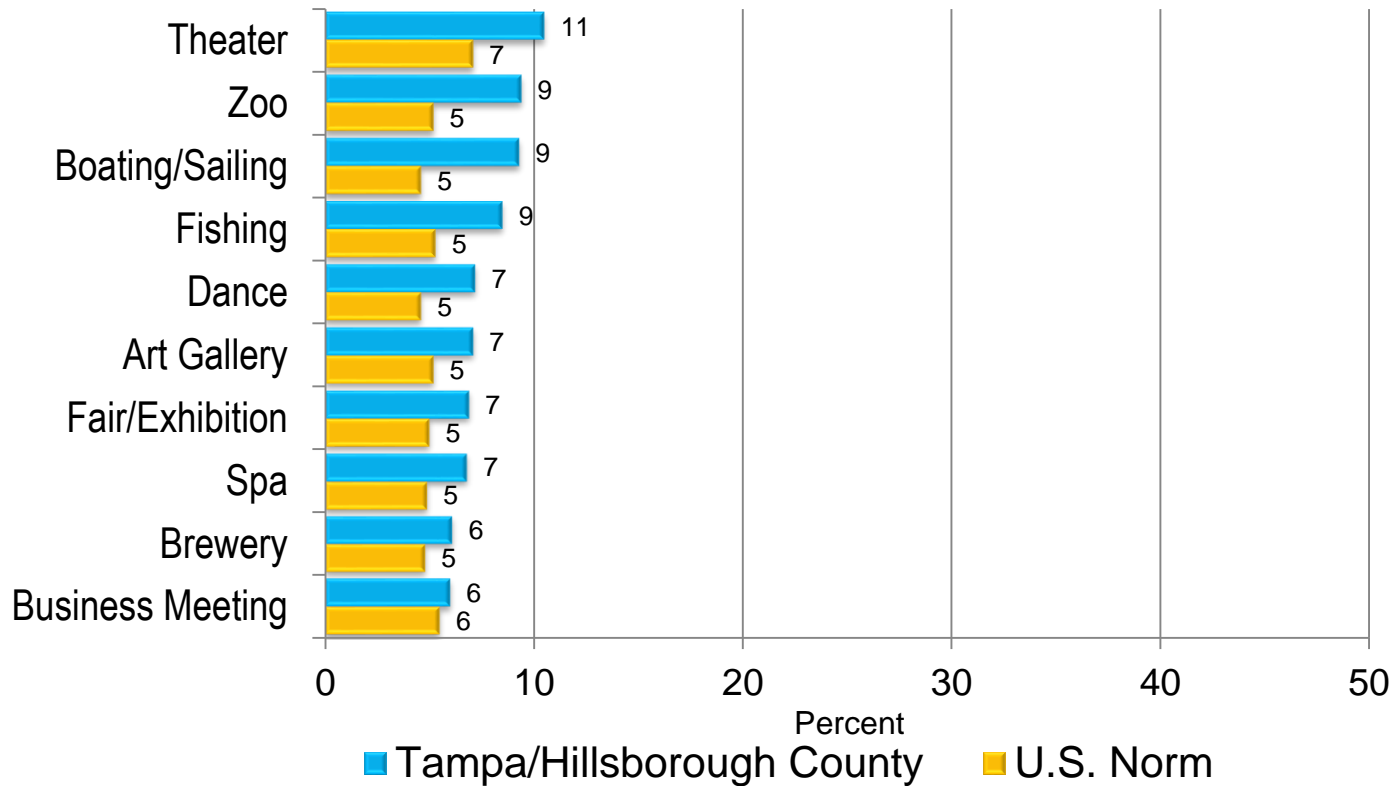
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



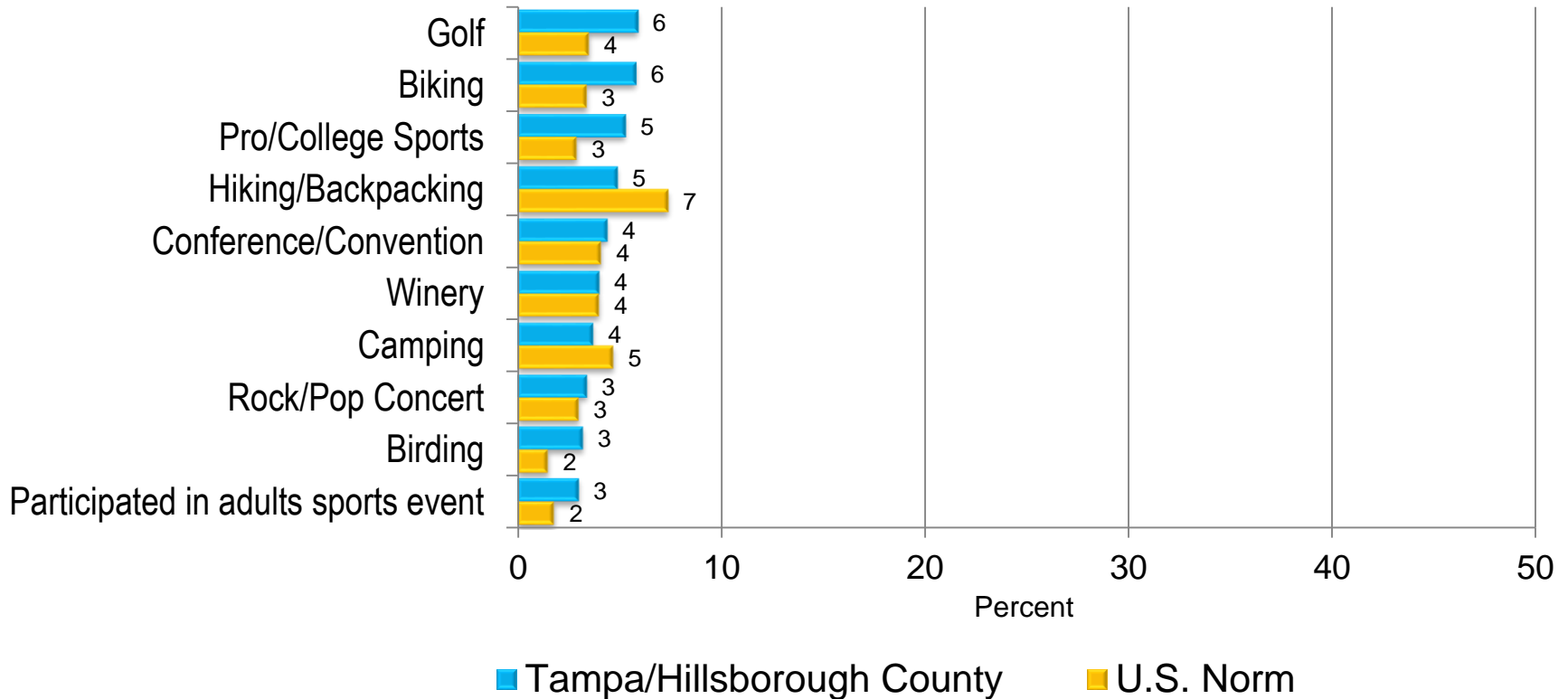
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



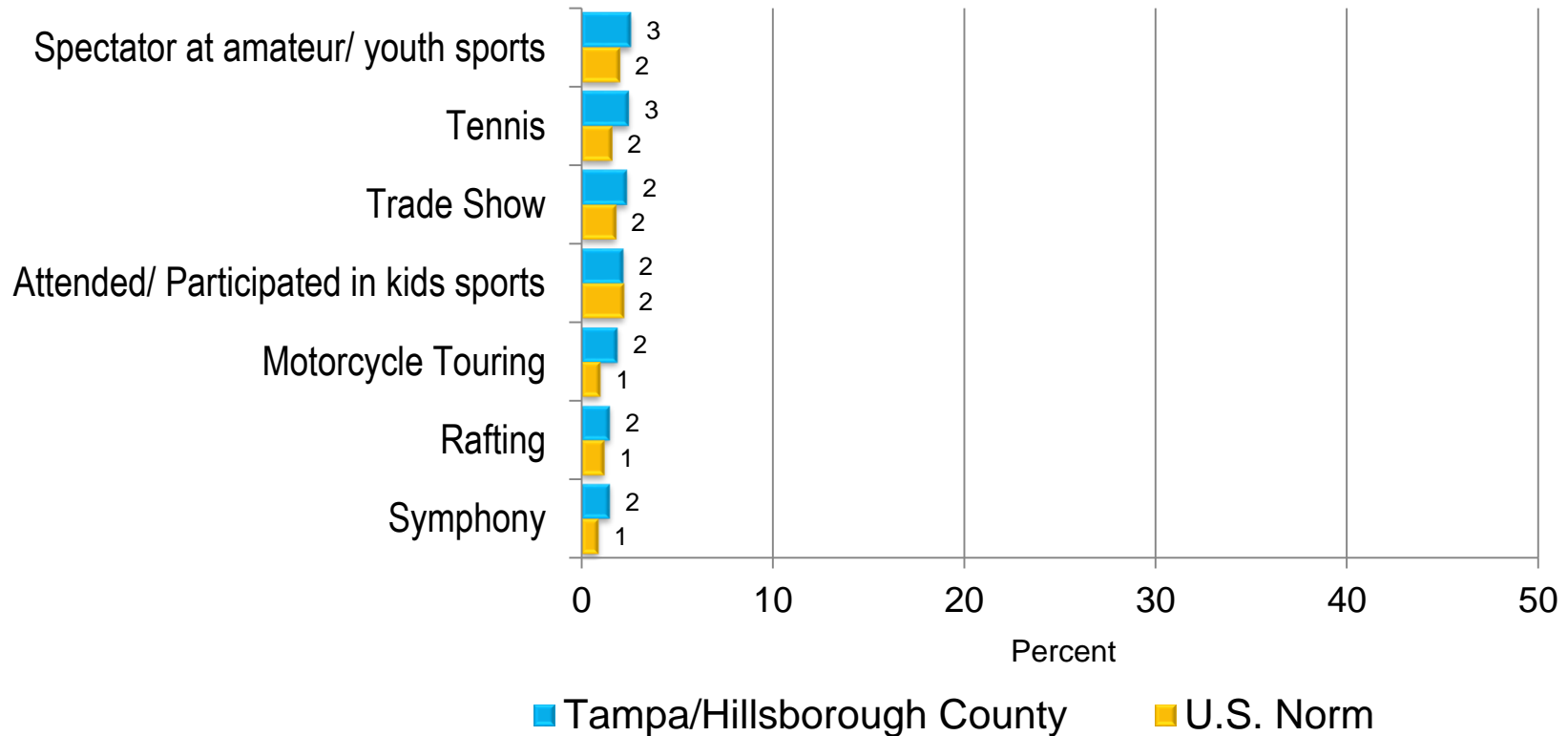
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



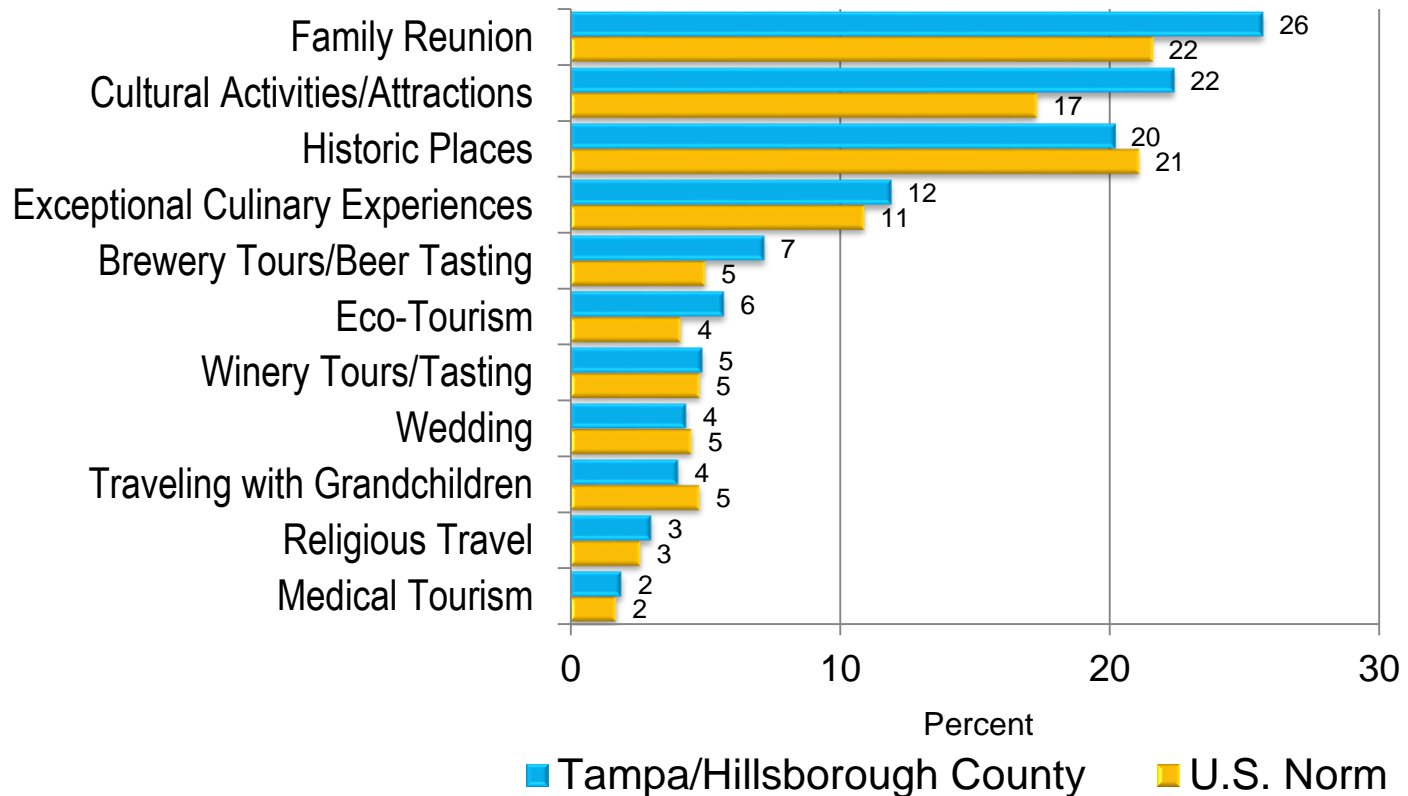
Base: Total Overnight Person-Trips



Activities of Special Interest



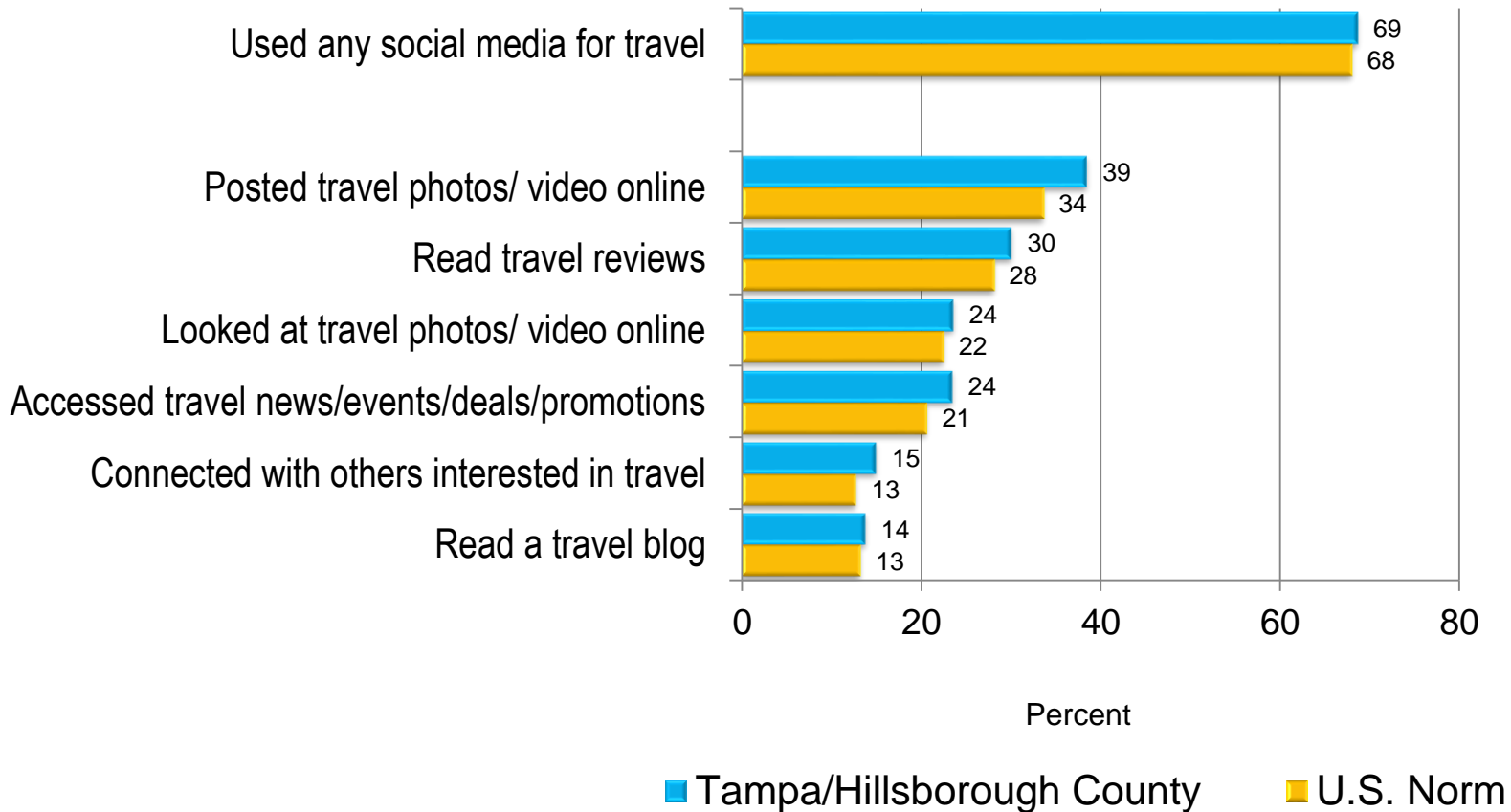
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



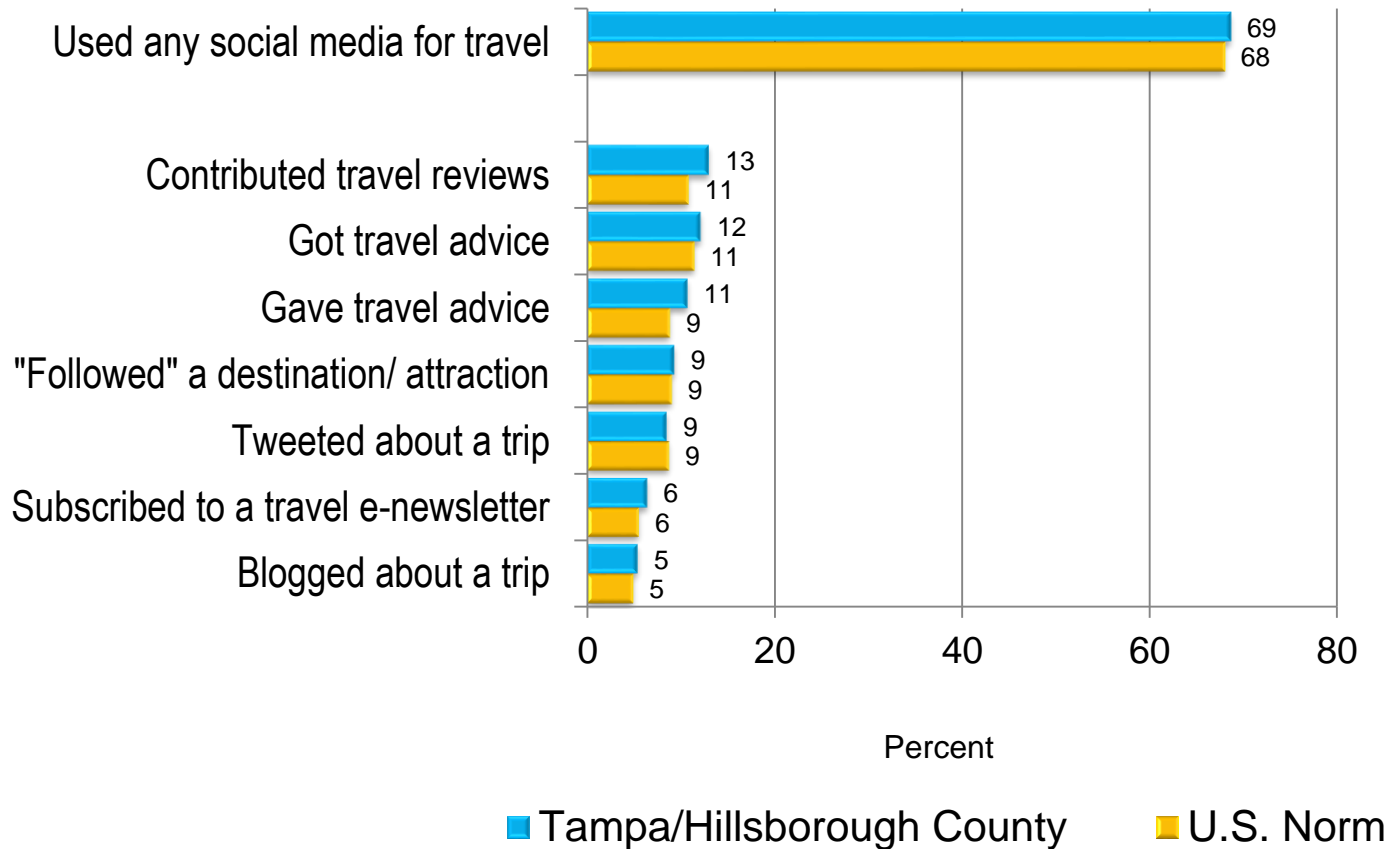
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers (Cont'd)



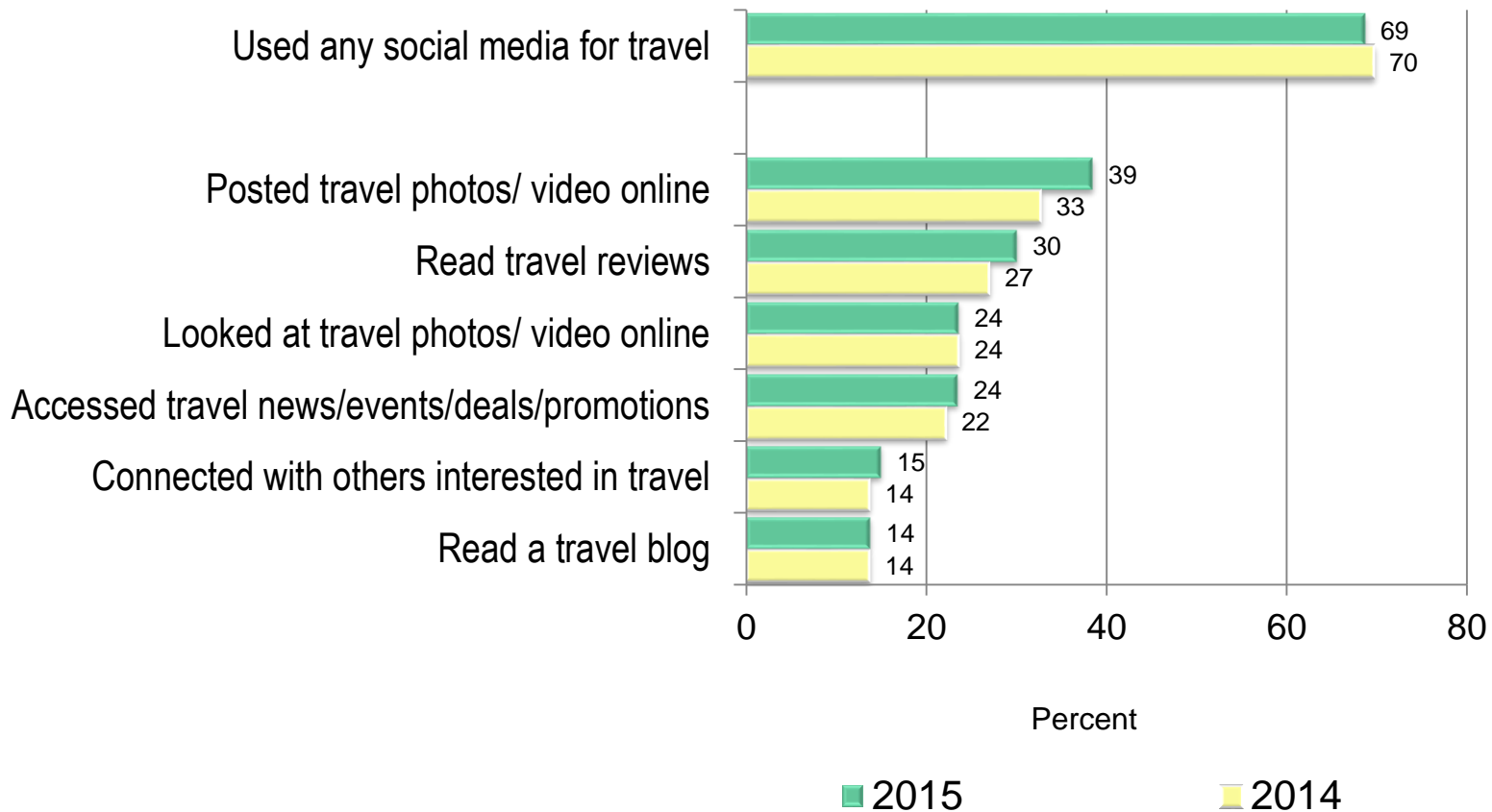
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers in Tampa/Hillsborough County – 2015 vs. 2014



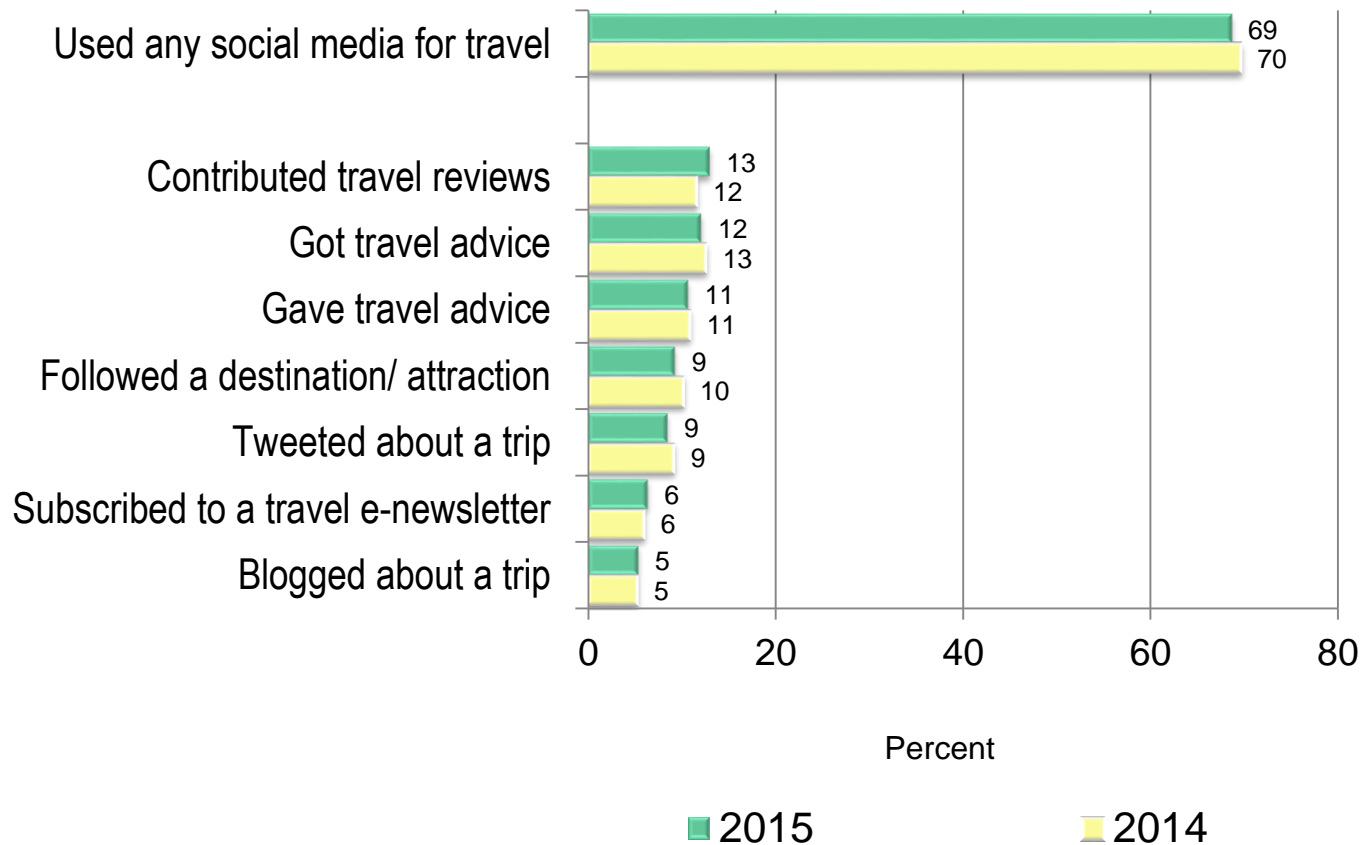
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers in Tampa/Hillsborough County – 2015 vs. 2014 (Cont'd)



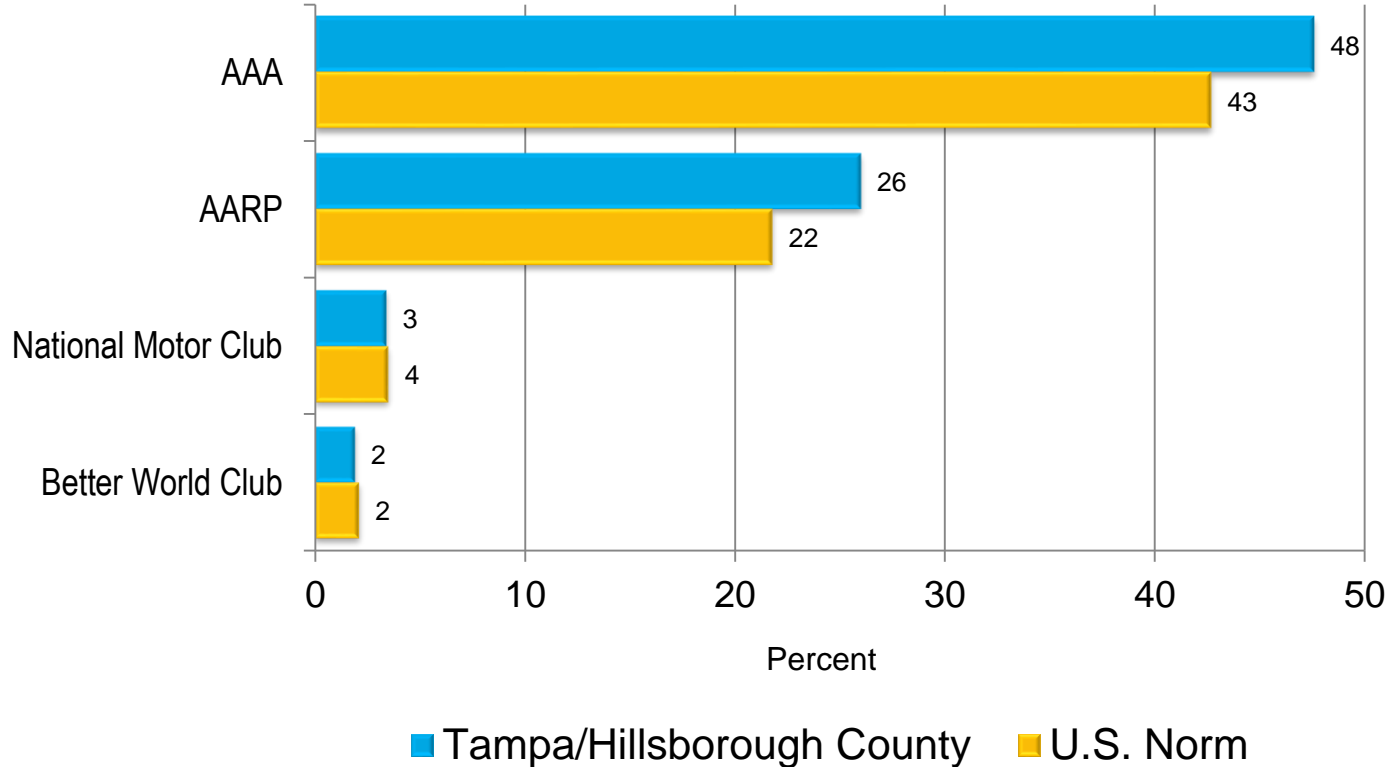
Base: Total Overnight Person-Trips



Organization Membership



Base: Total Overnight Person-Trips



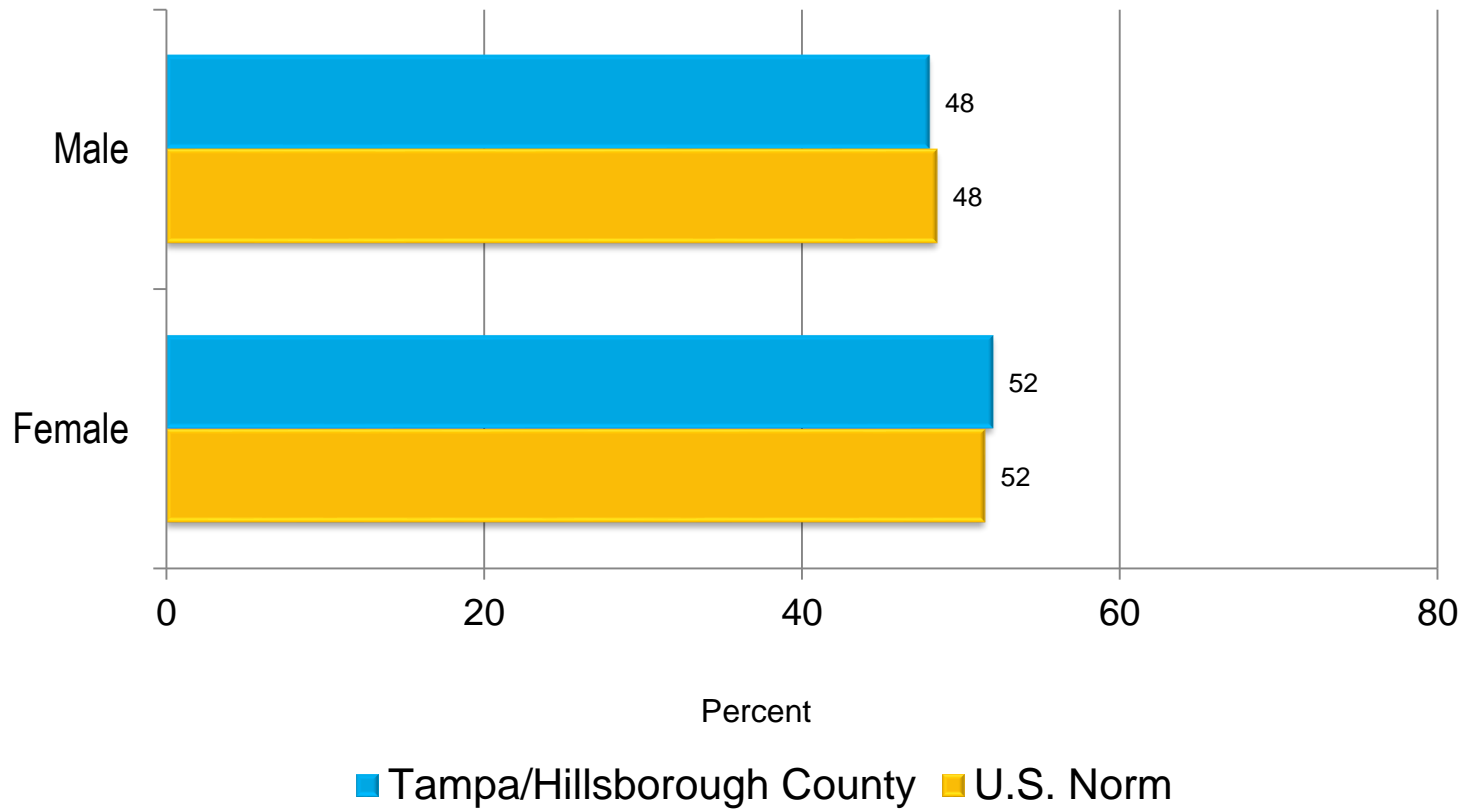


Demographic Profile of Overnight Visitors

Gender



Base: Total Overnight Person-Trips



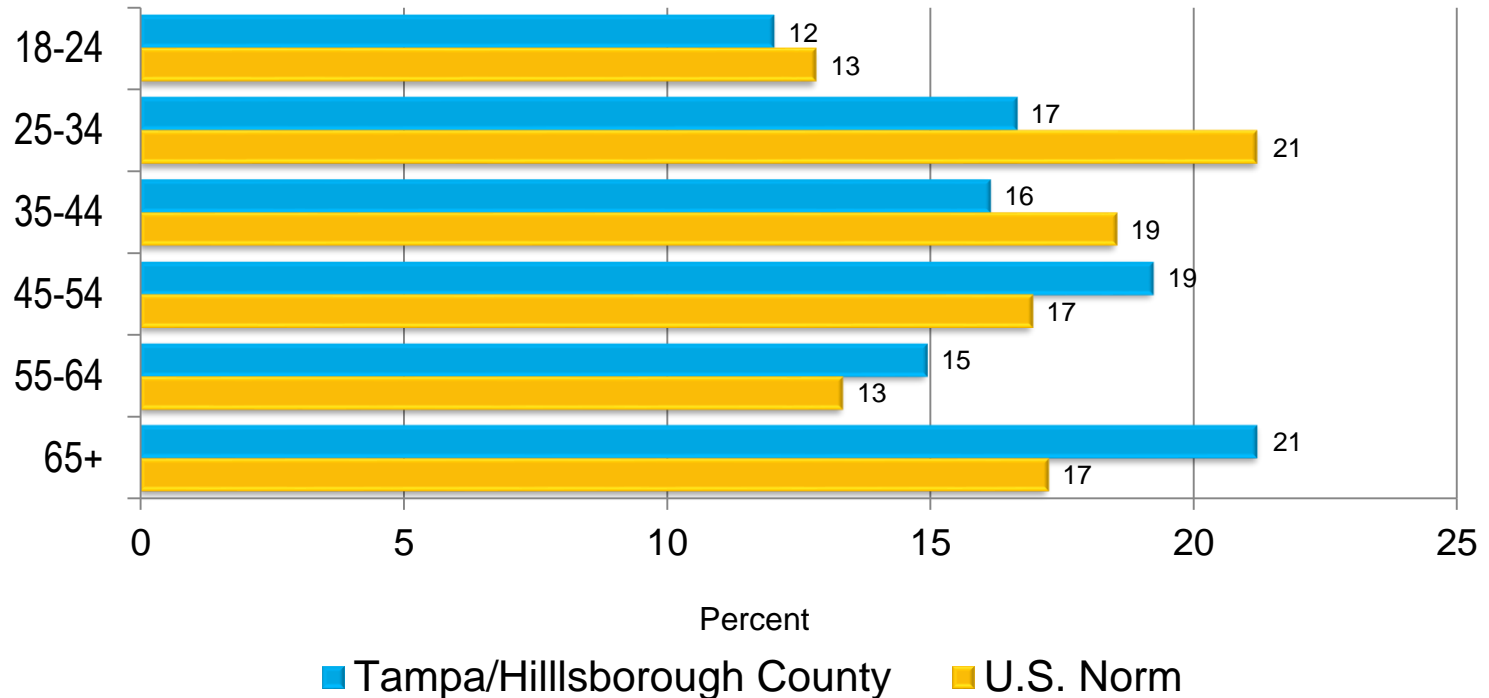
Age



Base: Total Overnight Person-Trips

Average Tampa/Hillsborough County = 47.3

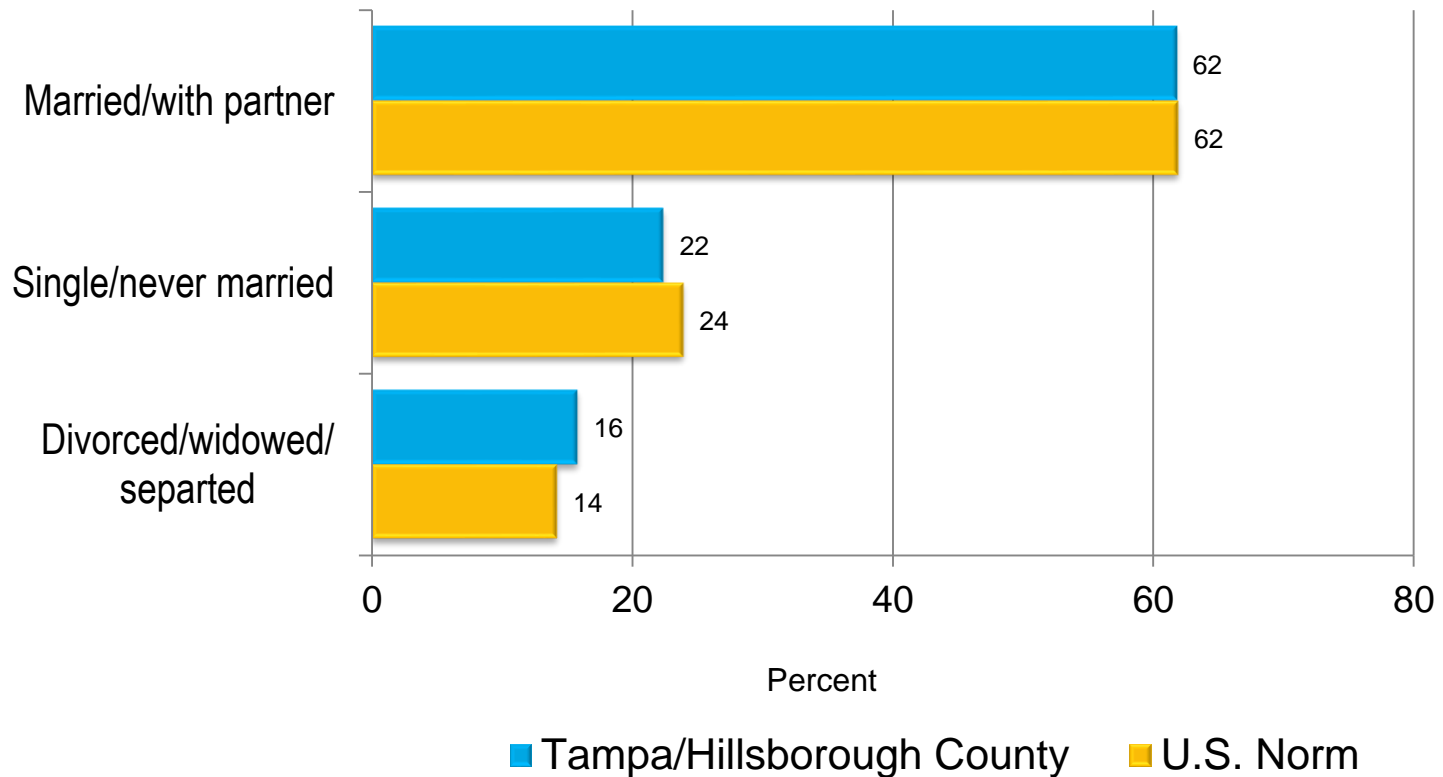
Average U.S. Norm = 44.9



Marital Status



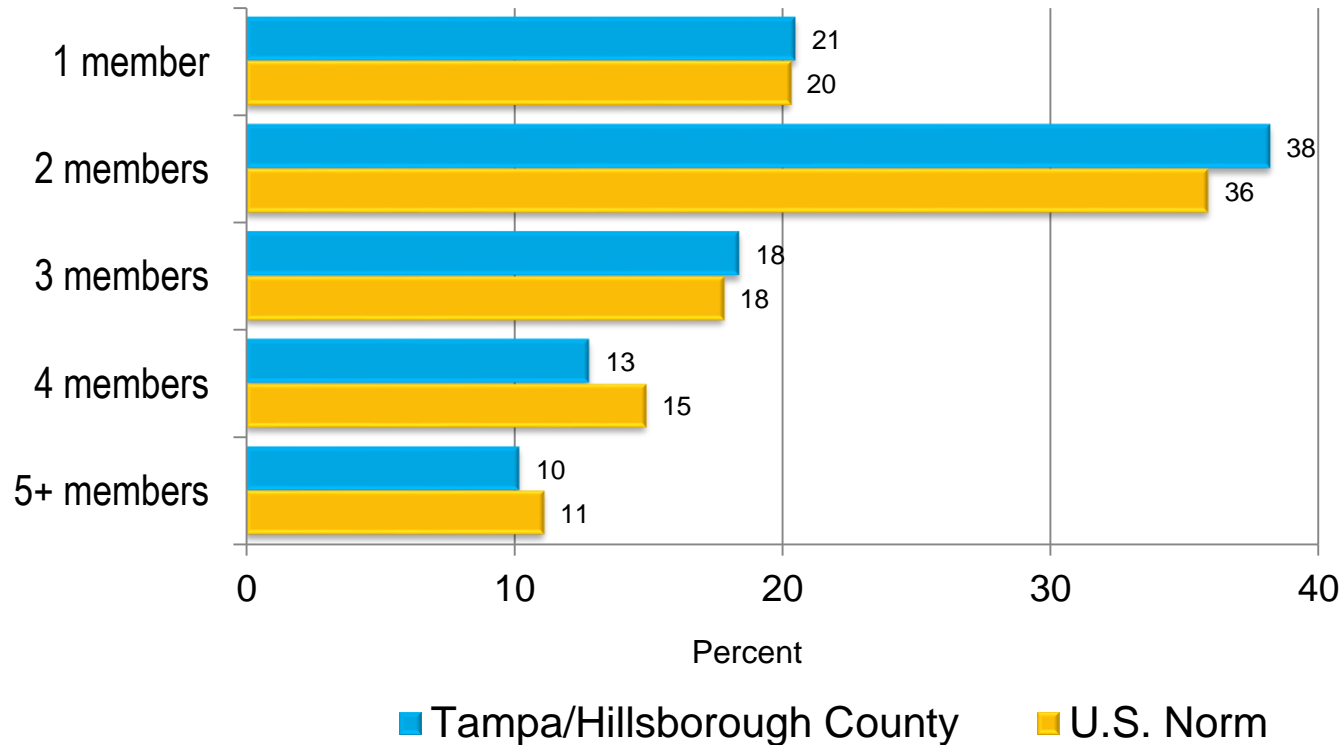
Base: Total Overnight Person-Trips



Household Size



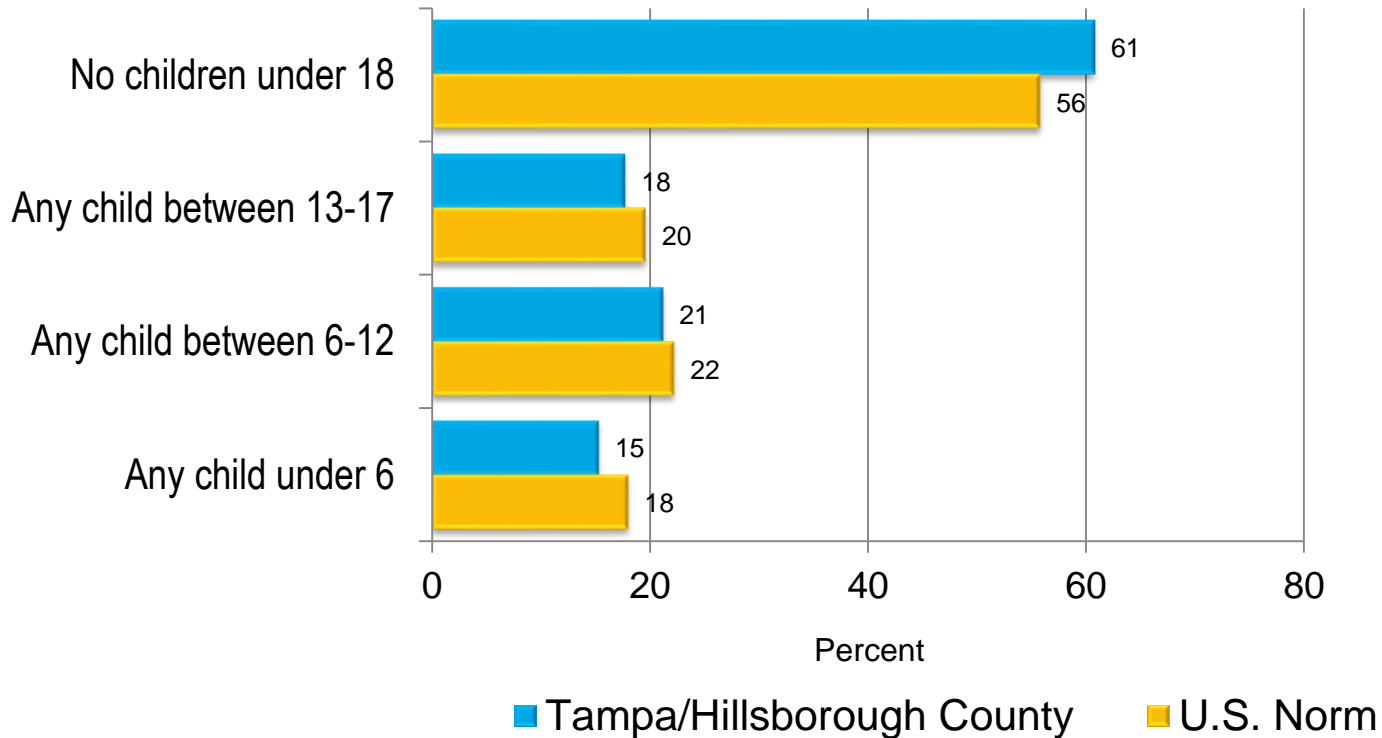
Base: Total Overnight Person-Trips



Children in Household



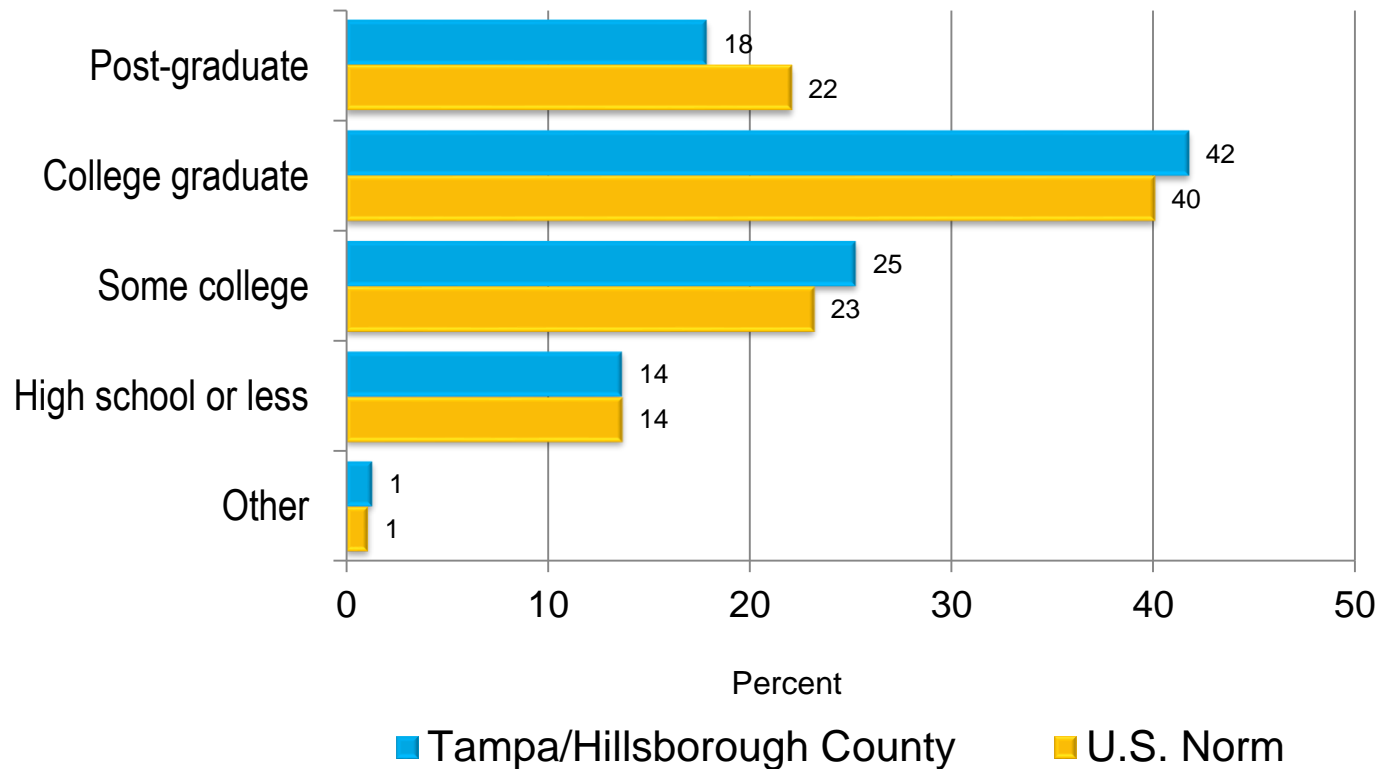
Base: Total Overnight Person Trips



Education



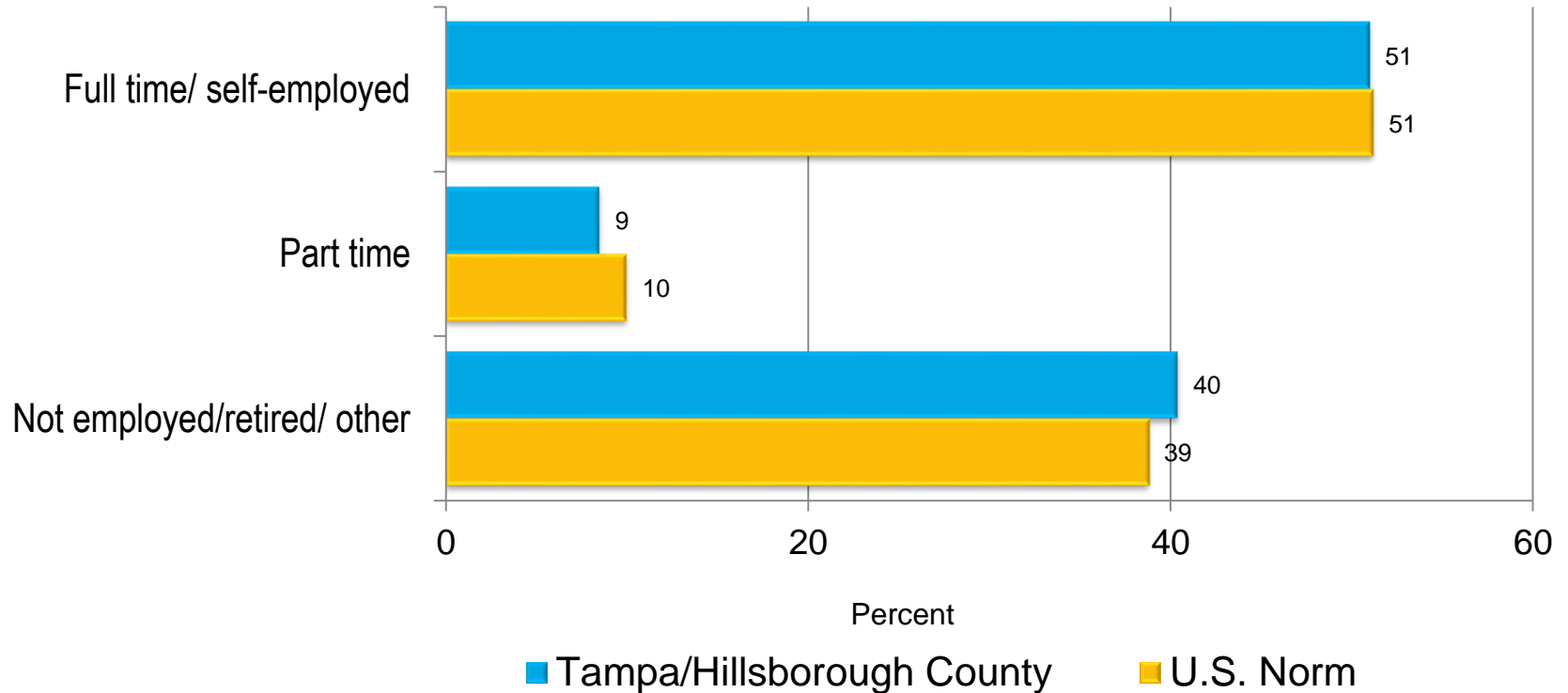
Base: Total Overnight Person-Trips



Employment



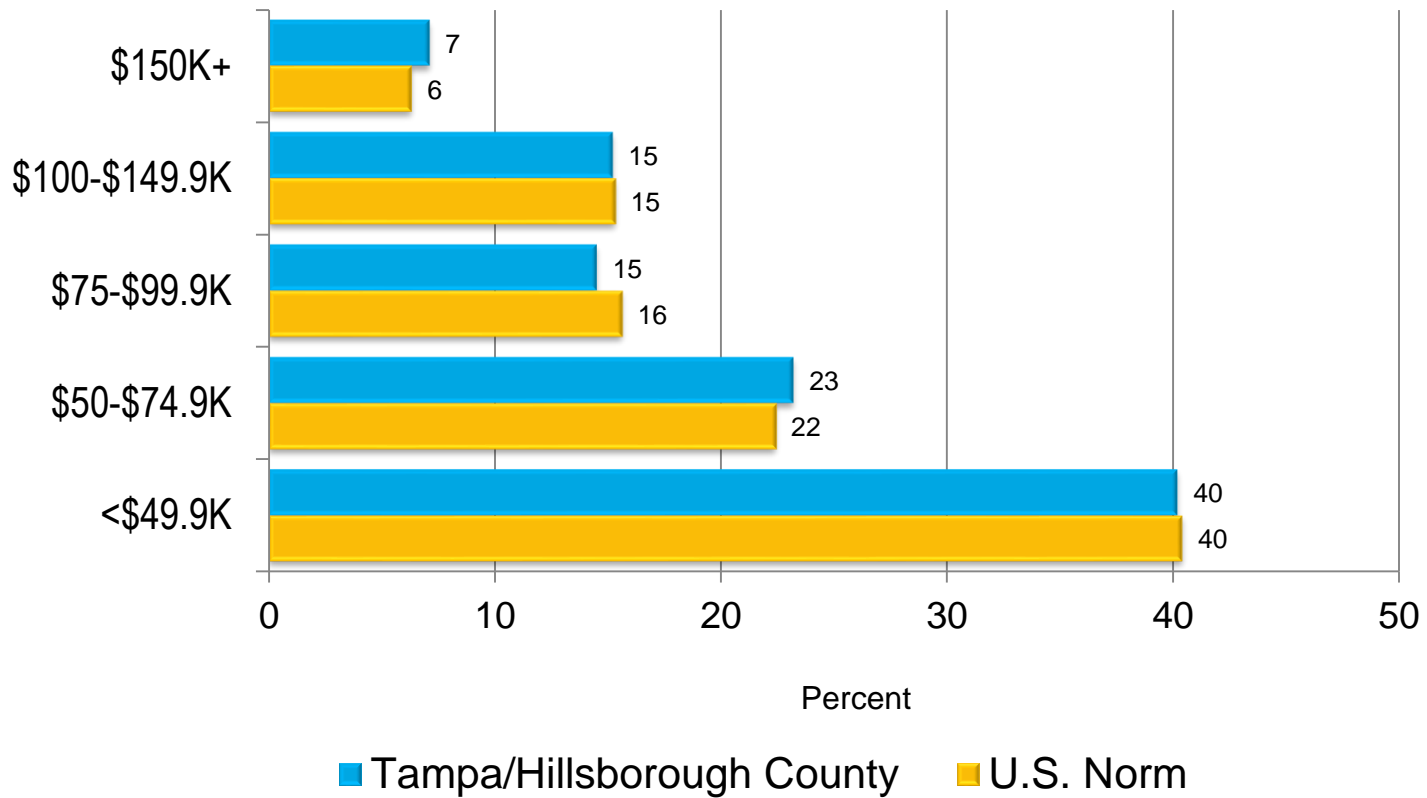
Base: Total Overnight Person-Trips



Household Income



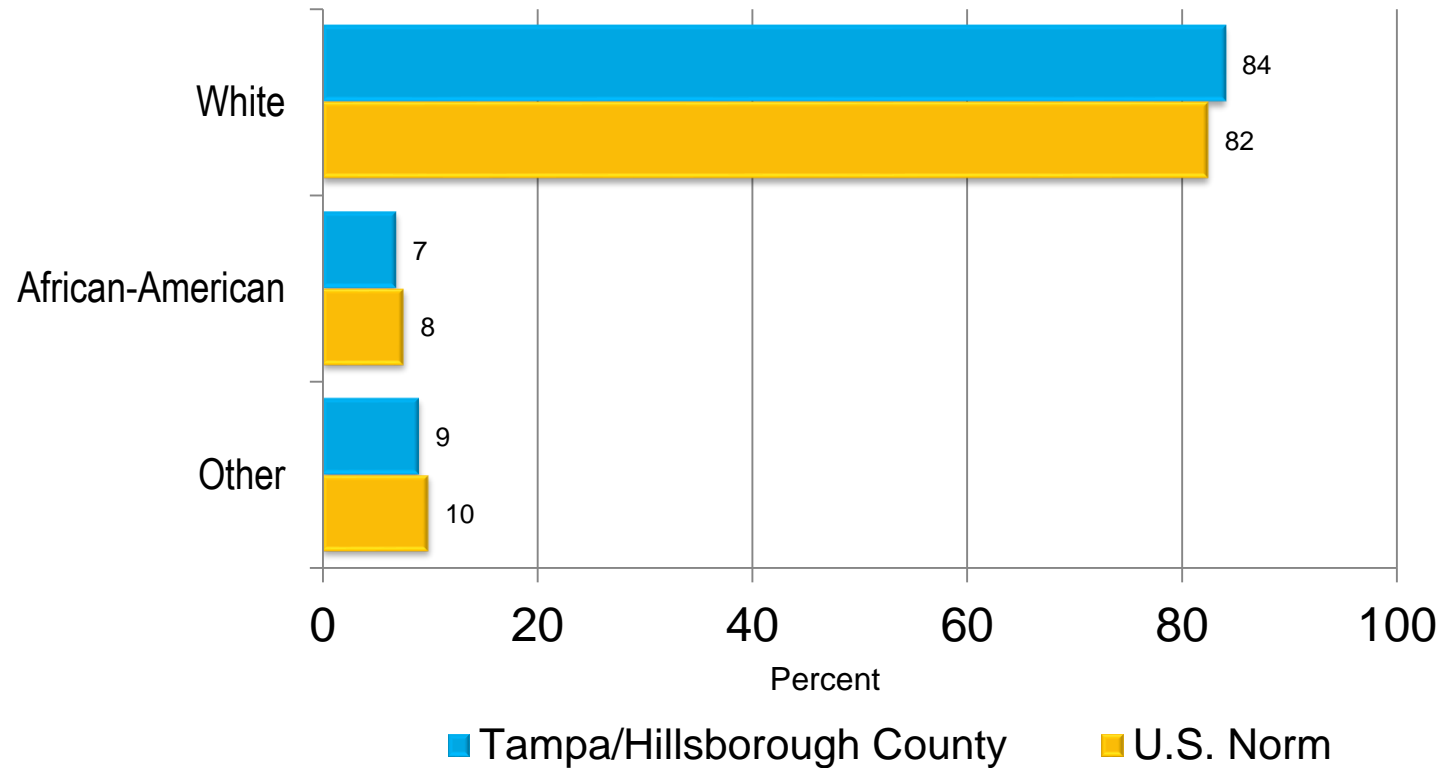
Base: Total Overnight Person-Trips



Race



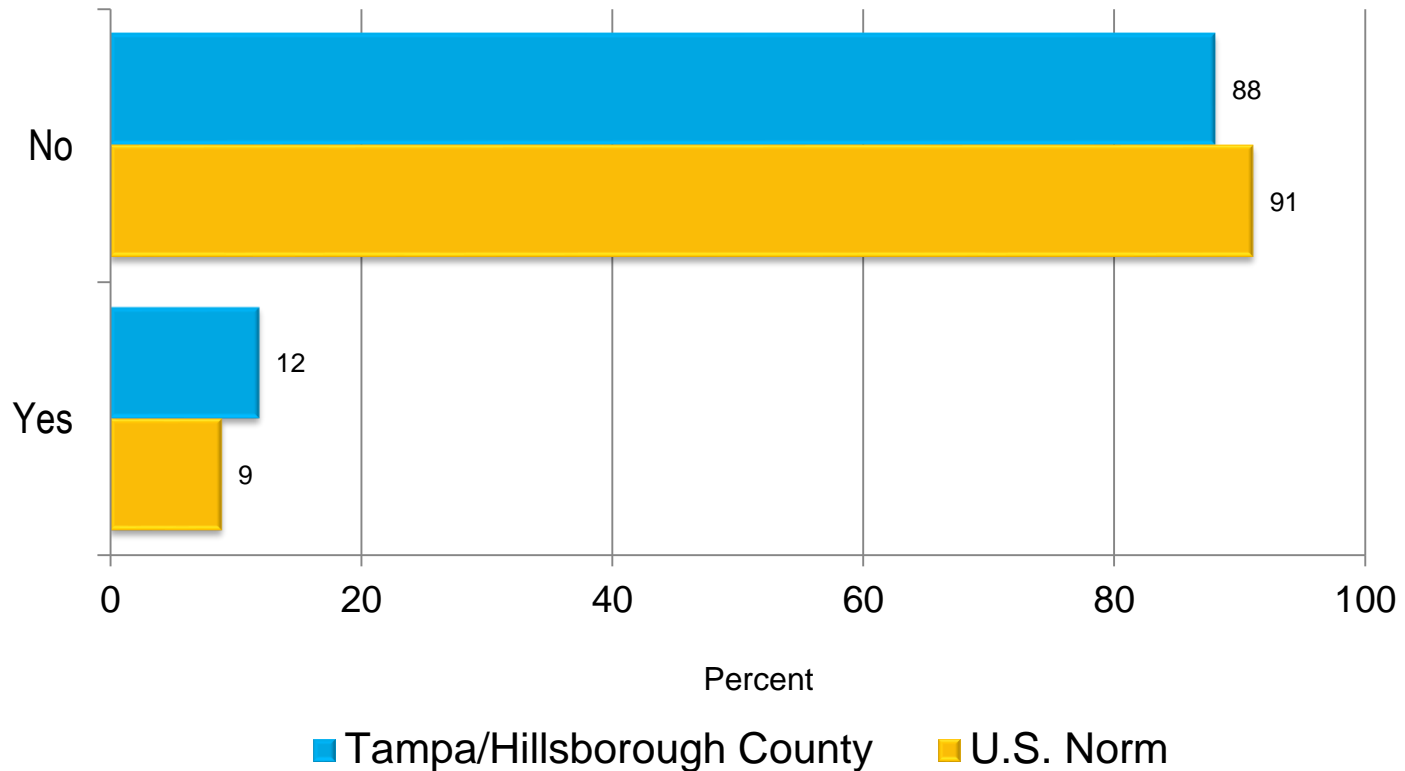
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Day Trip Detail

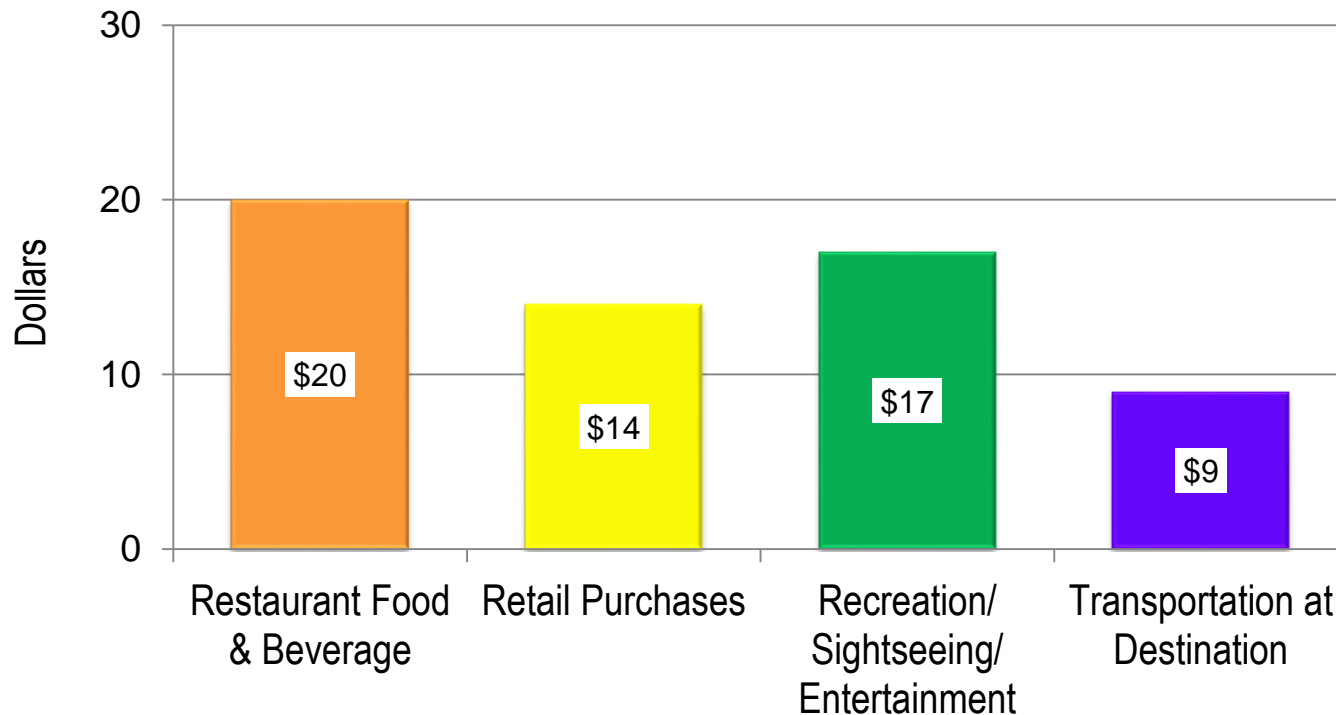


Day Trip Expenditures

Average Per Person Expenditures on Day Trips – By Sector



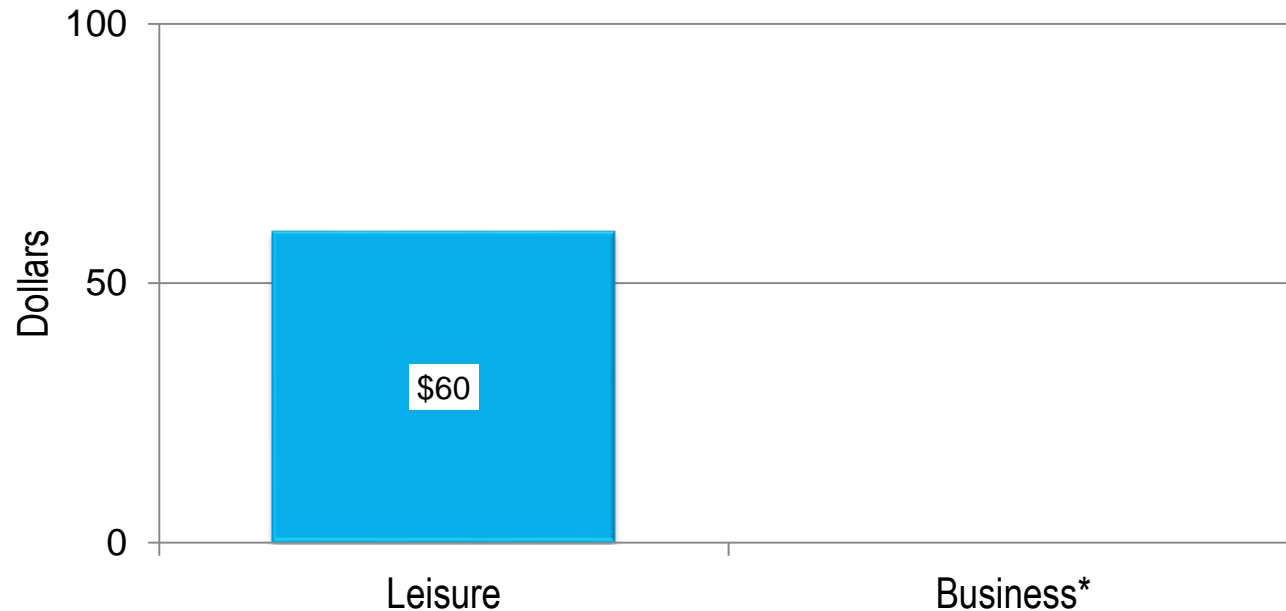
Base: Total Day Person-Trips to Tampa/Hillsborough County



Average Per Person Expenditures on Day Trips – by Trip Purpose



Base: Total Day Person-Trips to Tampa/Hillsborough County

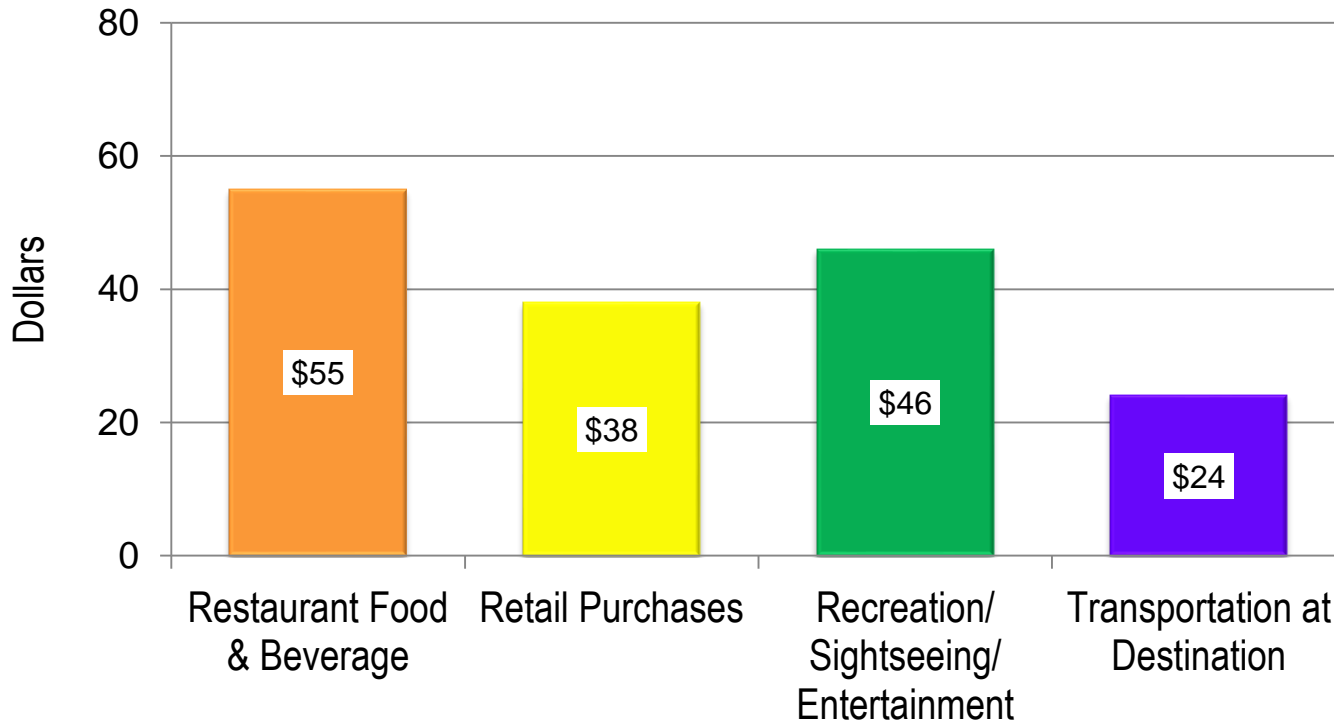


* Low base sizes

Average Per Party Expenditures on Day Trips – By Sector



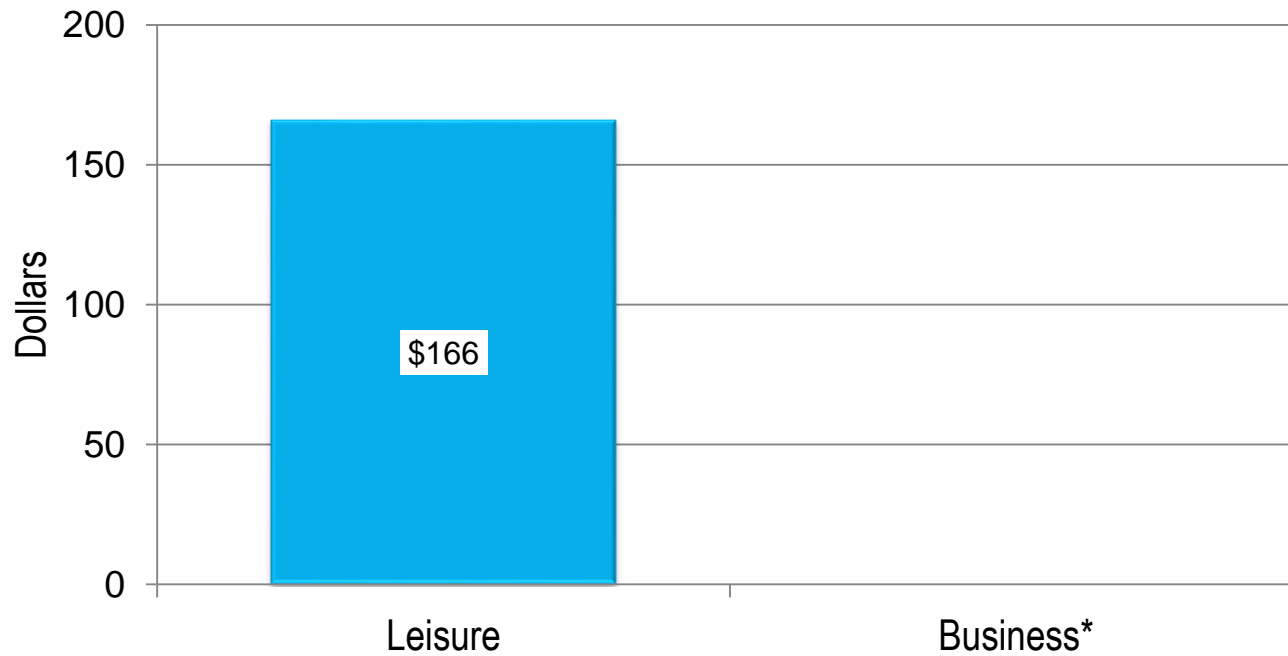
Base: Total Day Person-Trips to Tampa/Hillsborough County



Average Per Party Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips to Tampa/Hillsborough County



* Low base sizes

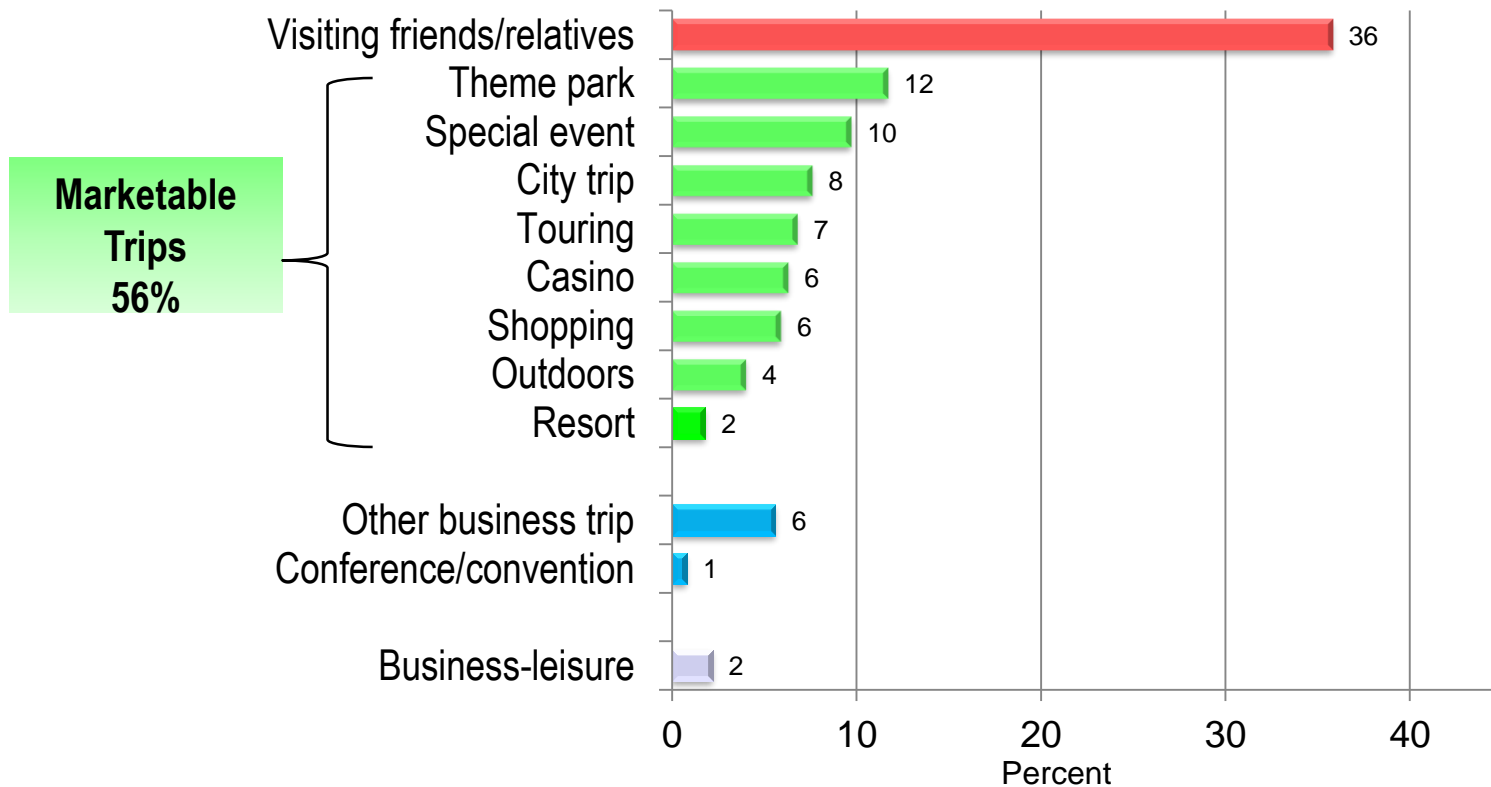


Day Trip Characteristics

Main Purpose of Trip



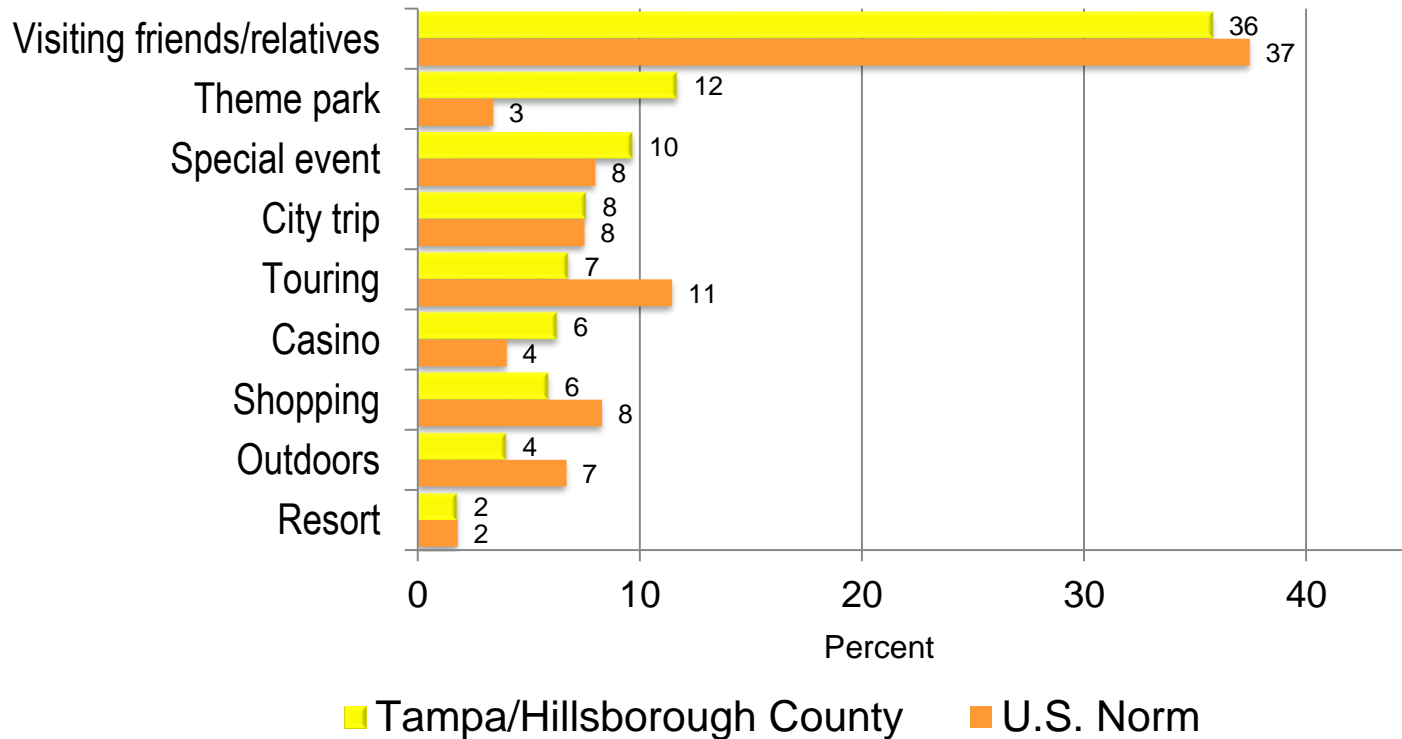
Base: Total Day Person-Trips to Tampa/Hillsborough County



Main Purpose of Leisure Trip – Tampa/Hillsborough County vs. National Norm



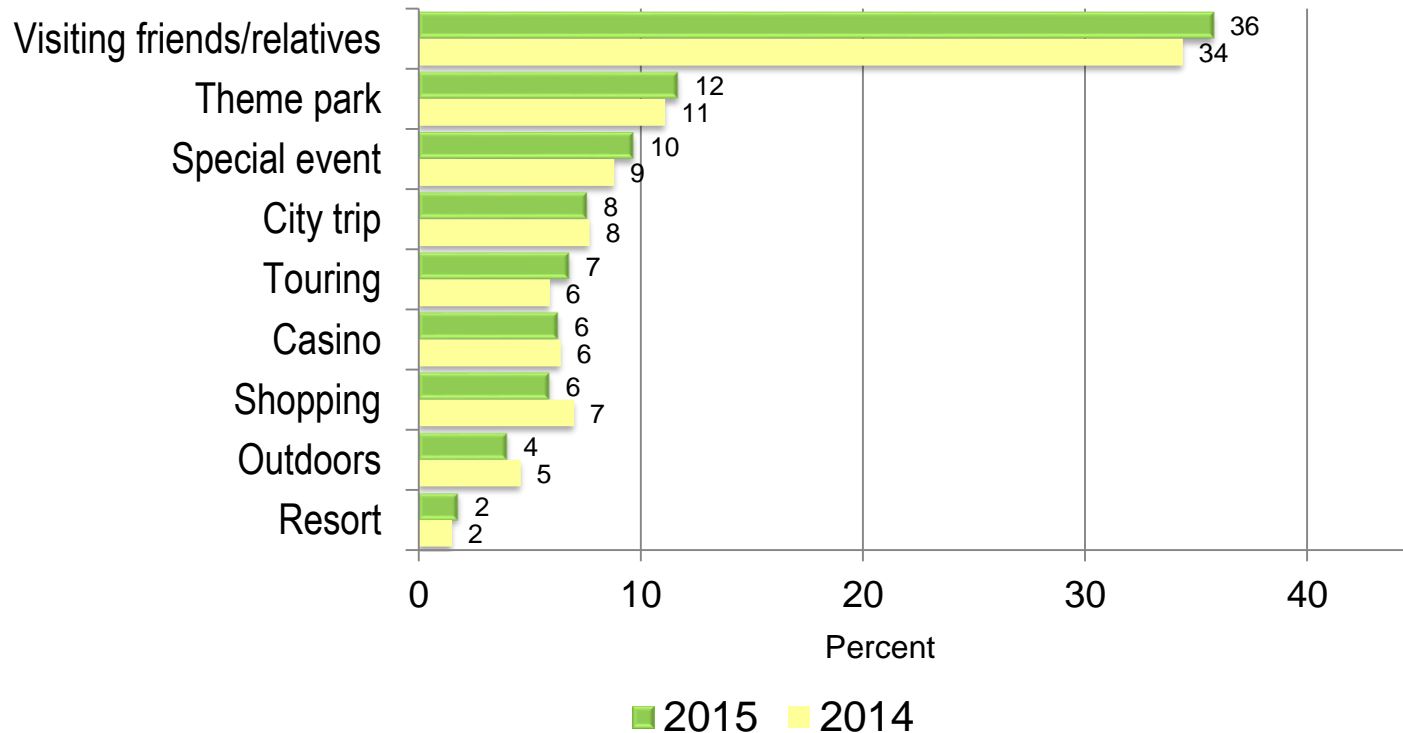
Base: Total Day Person-Trips



Main Purpose of Day Leisure Trip to Tampa/Hillsborough County — 2015 vs. 2014



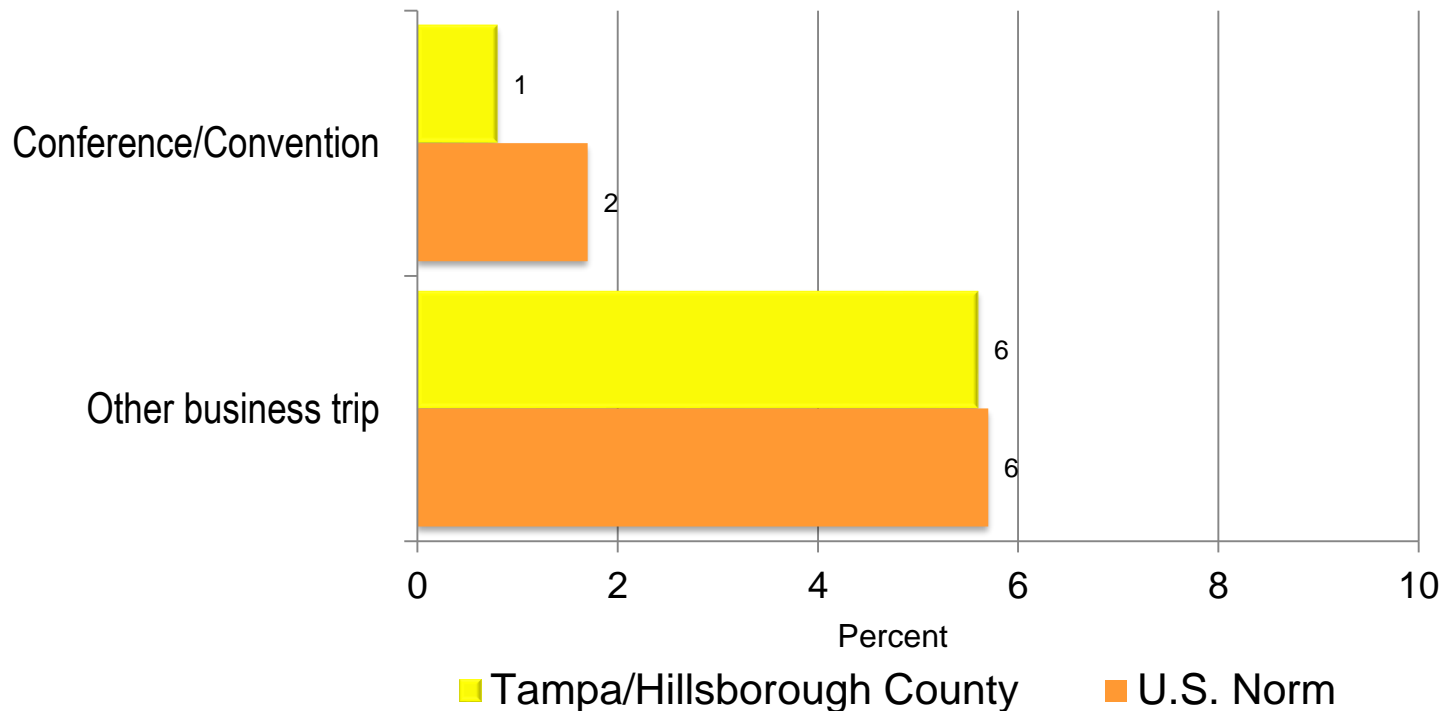
Base: Total Day Person-Trips



Main Purpose of Day Business Trip – Tampa/Hillsborough County vs. National Norm



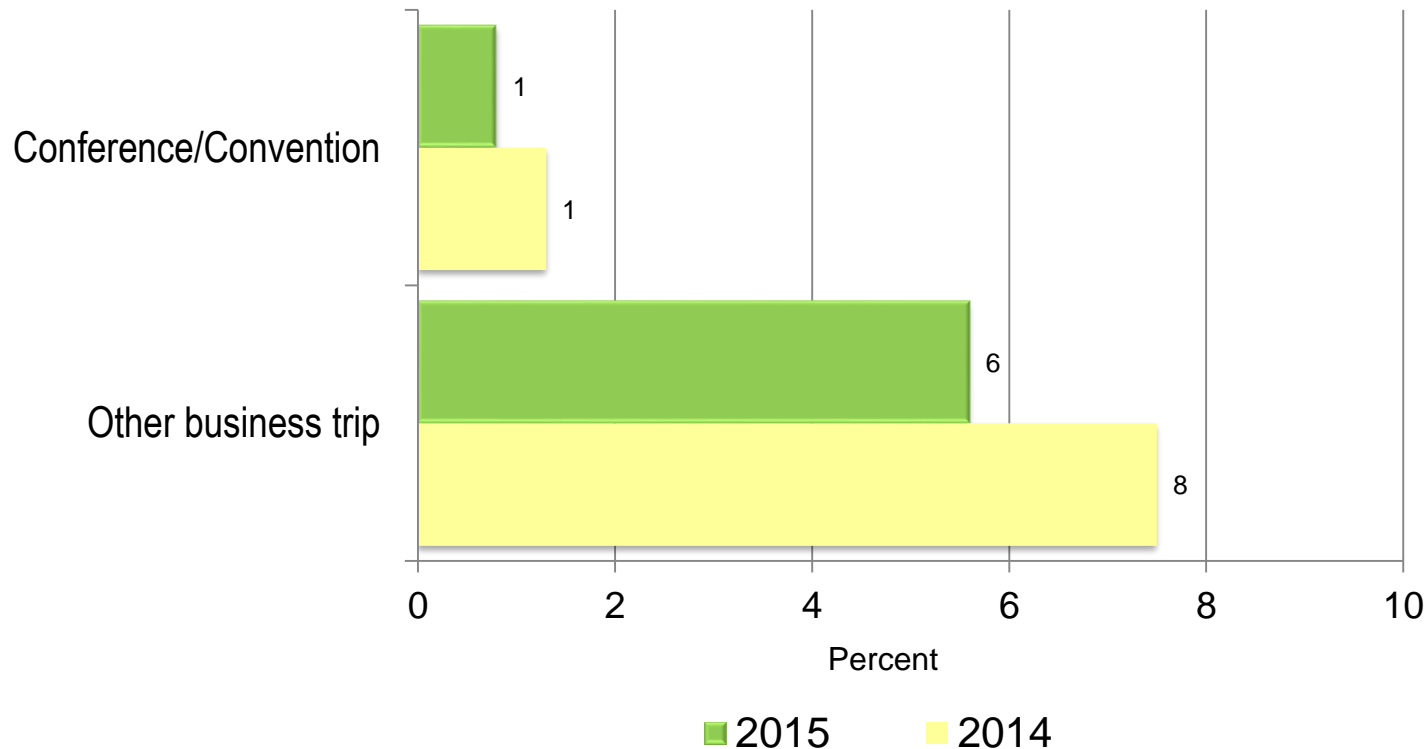
Base: Total Day Person-Trips



Main Purpose of Day Business Trip to Tampa/Hillsborough County – 2015 vs. 2014



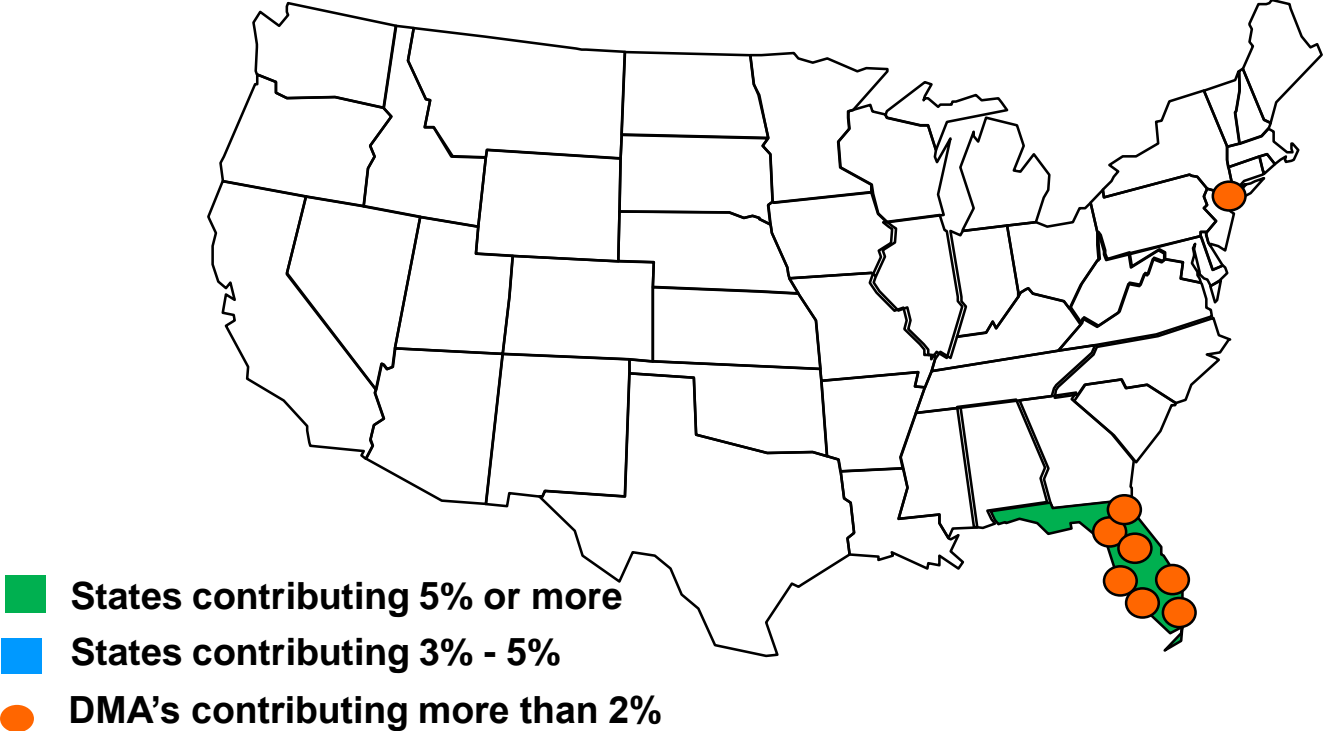
Base: Total Day Person-Trips to Tampa/Hillsborough County



Sources of Business



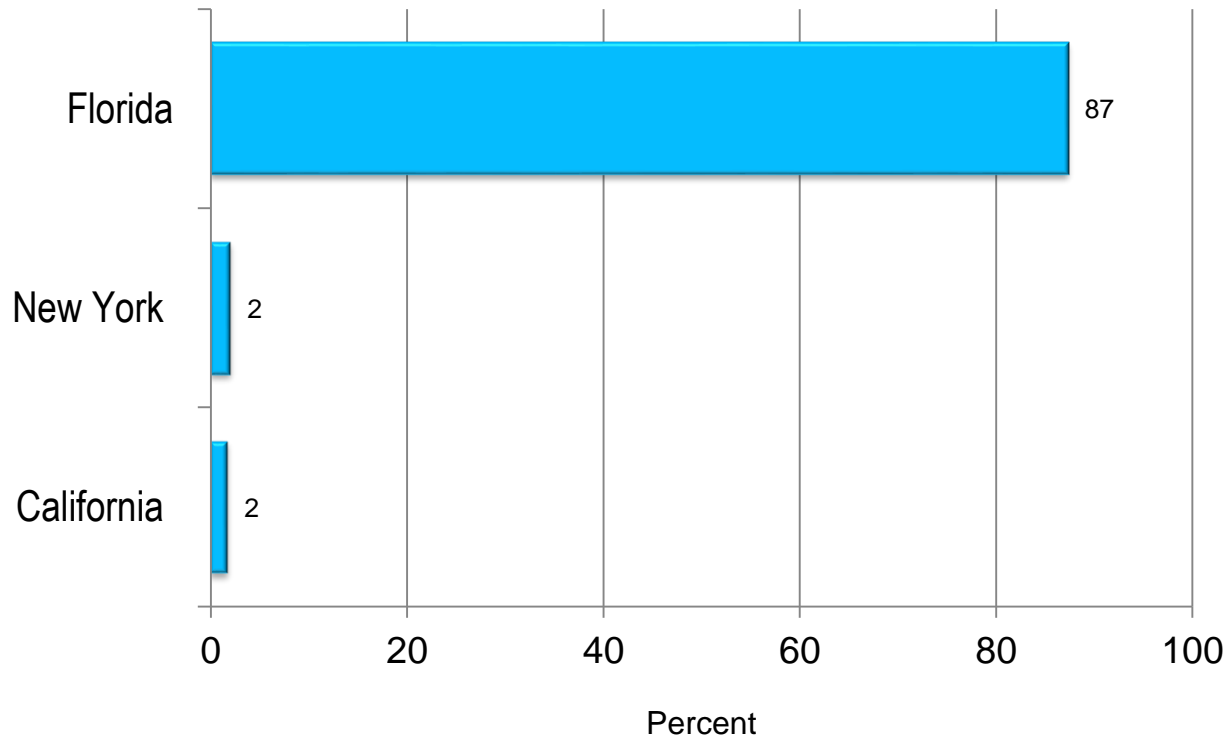
Base: Total Day Person-Trips to Tampa/Hillsborough County



State Origin Of Trip



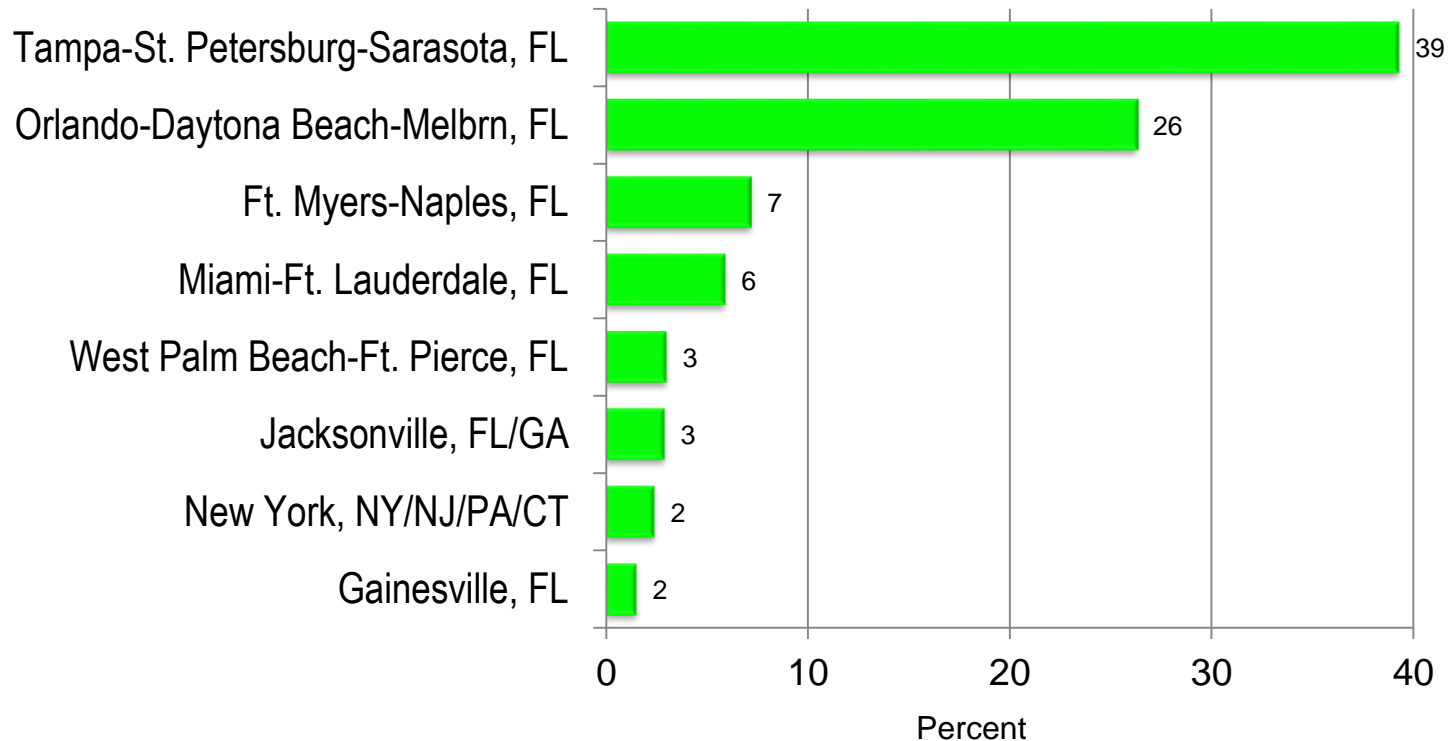
Base: Total Day Person-Trips to Tampa/Hillsborough County



DMA Origin Of Trip



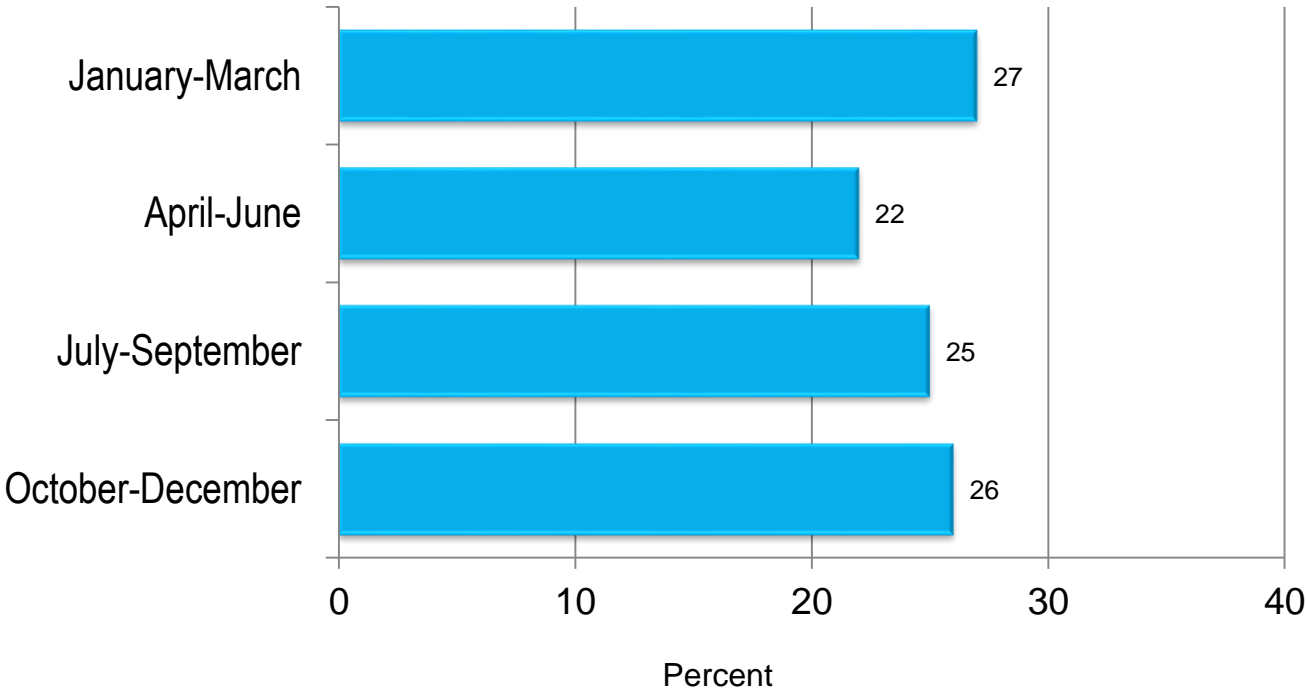
Base: Total Day Person-Trips to Tampa/Hillsborough County



Season of Trip



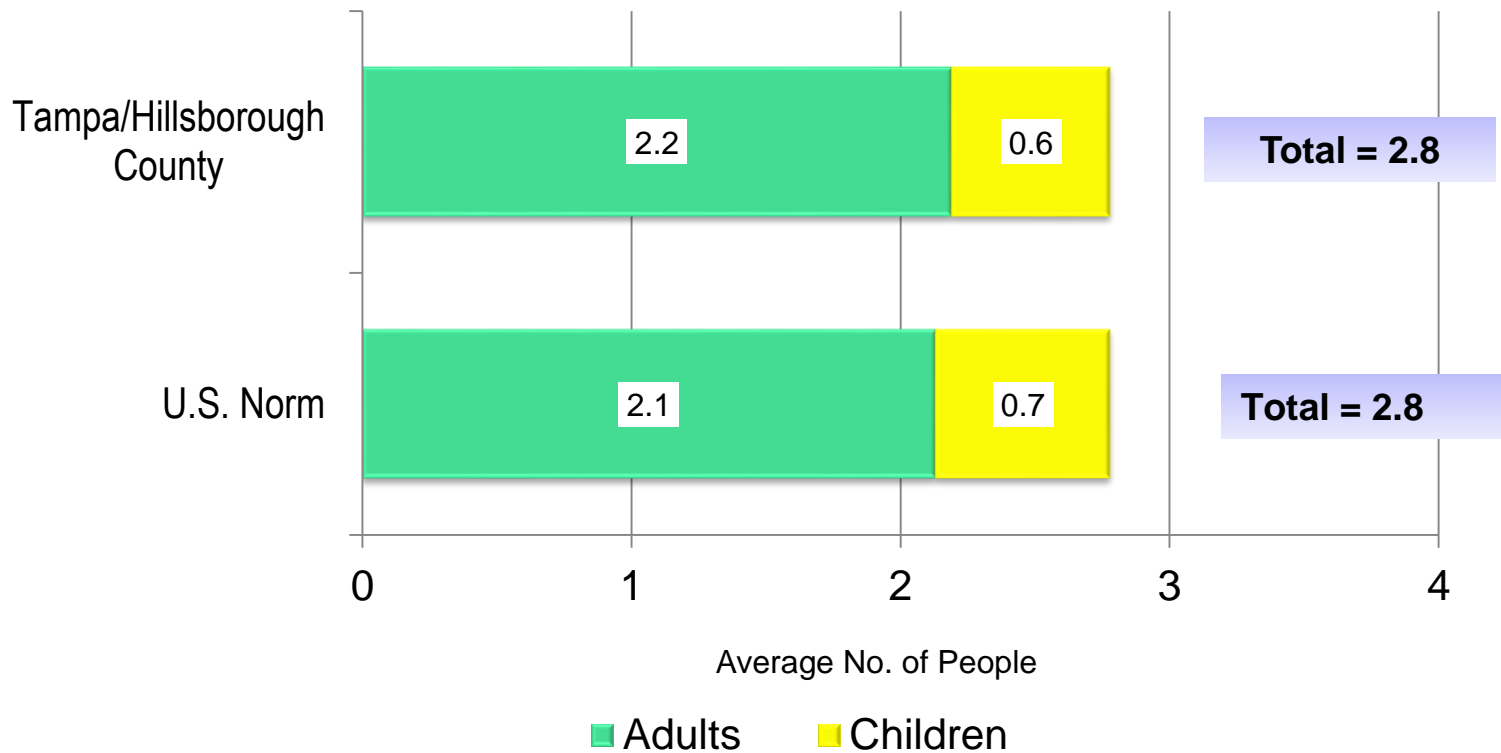
Base: Total Day Person-Trips to Tampa/Hillsborough County



Size of Travel Party



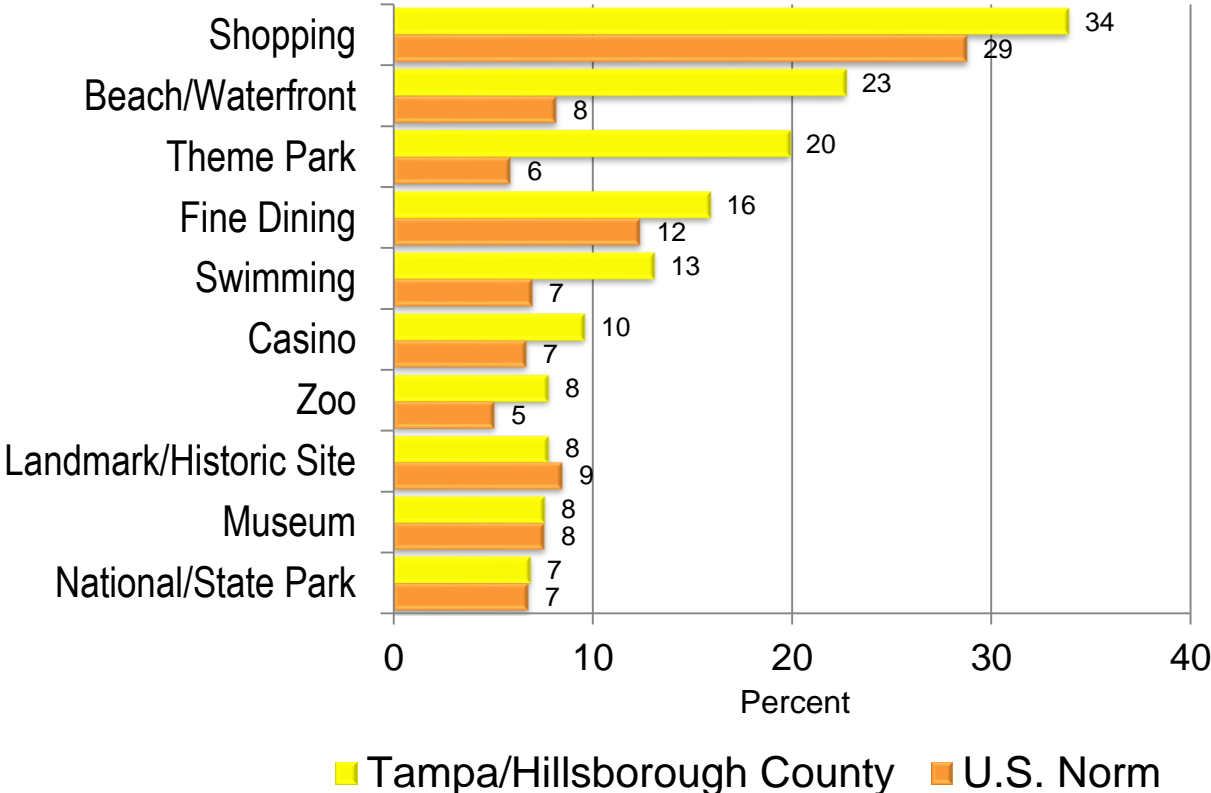
Base: Total Day Person-Trips



Activities and Experiences



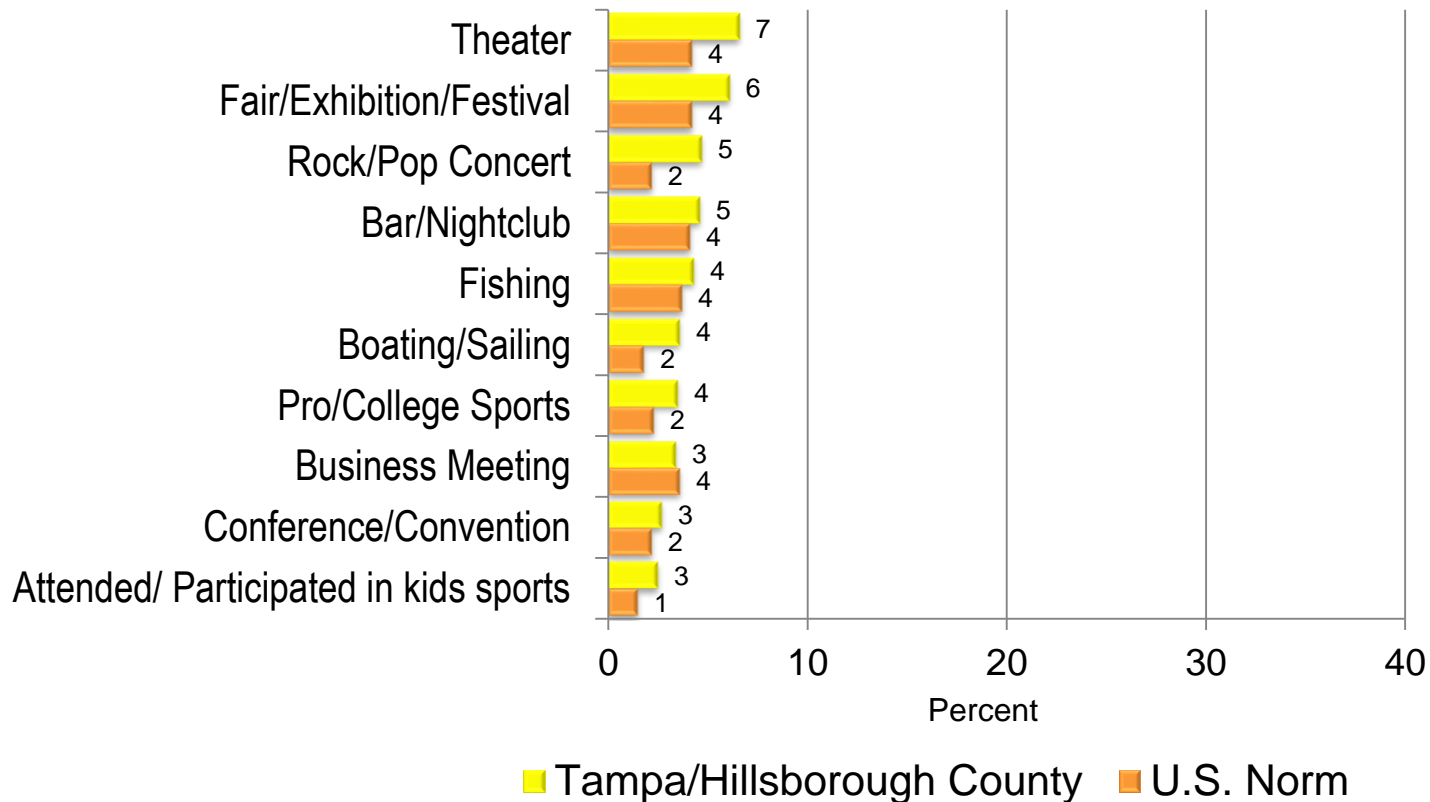
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



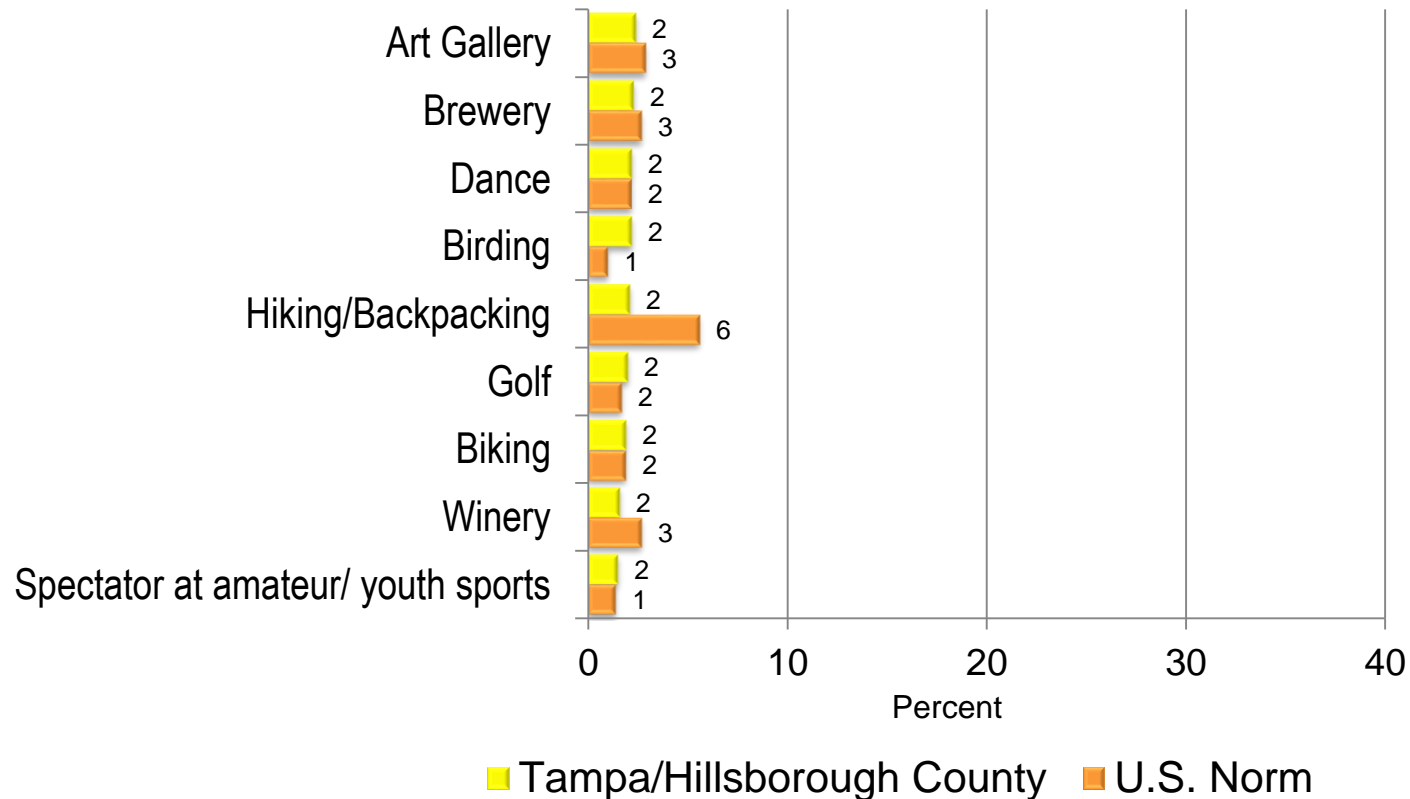
Base: Total Day Person-Trips



Activities and Experiences (Cont'd)



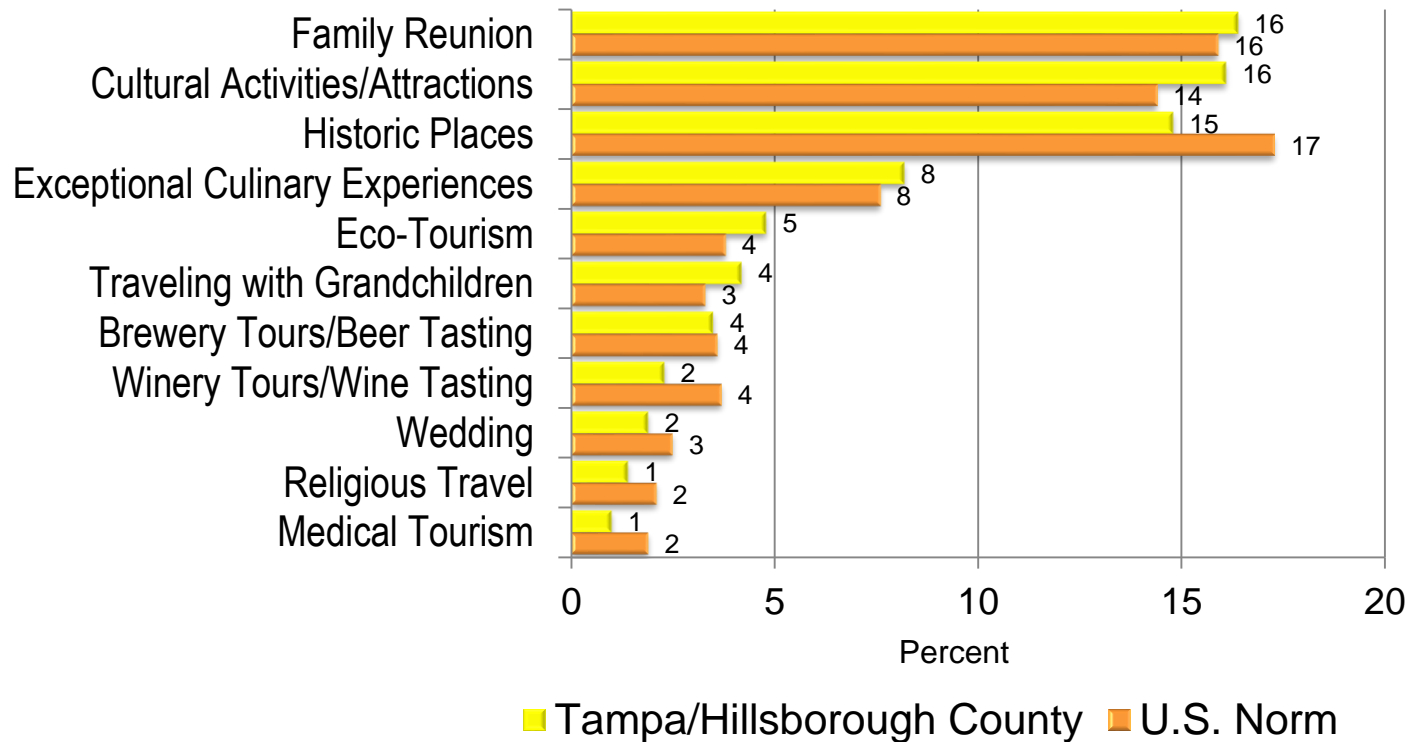
Base: Total Day Person-Trips



Activities of Special Interest



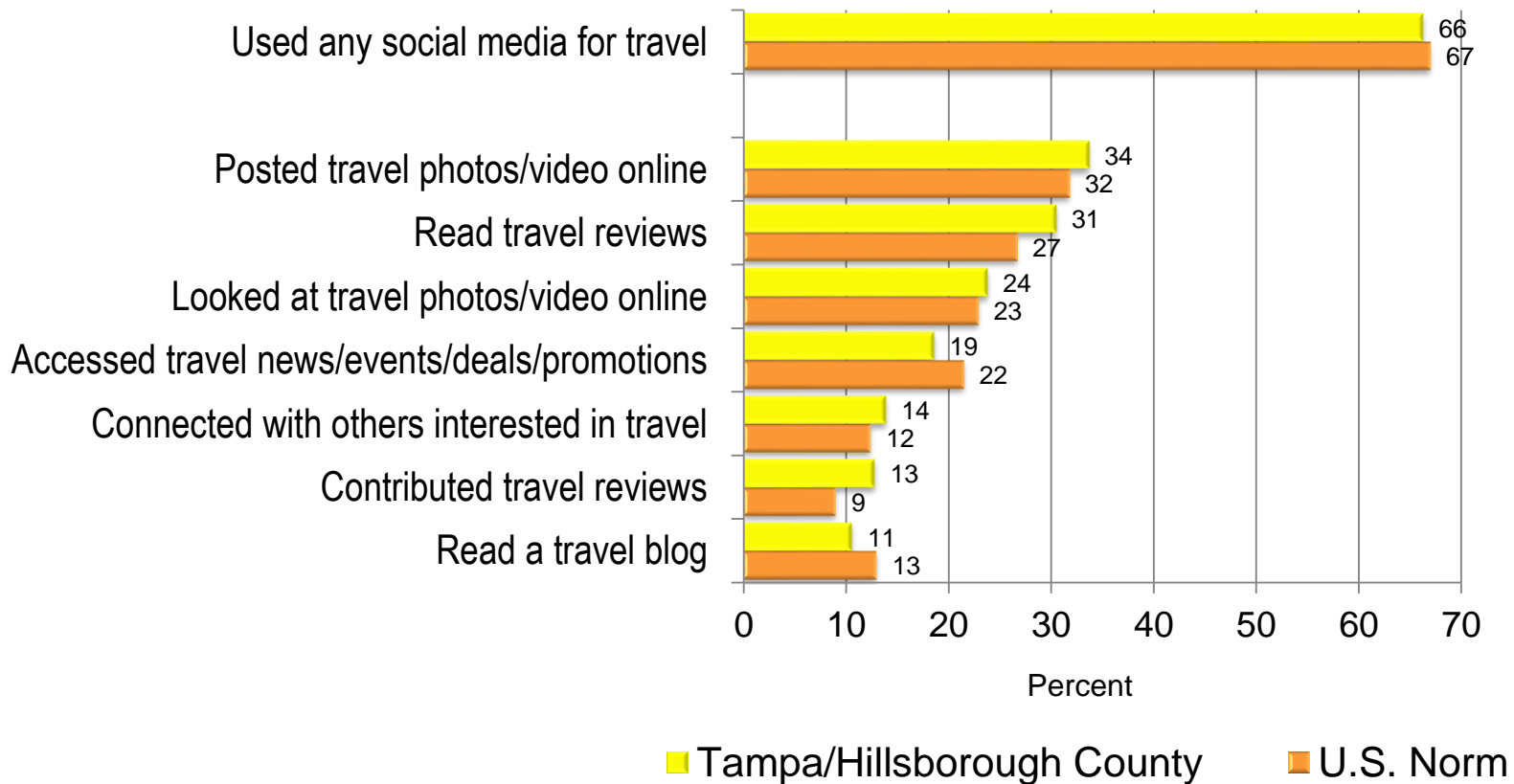
Base: Total Day Person-Trips



Online Social Media Use by Travelers



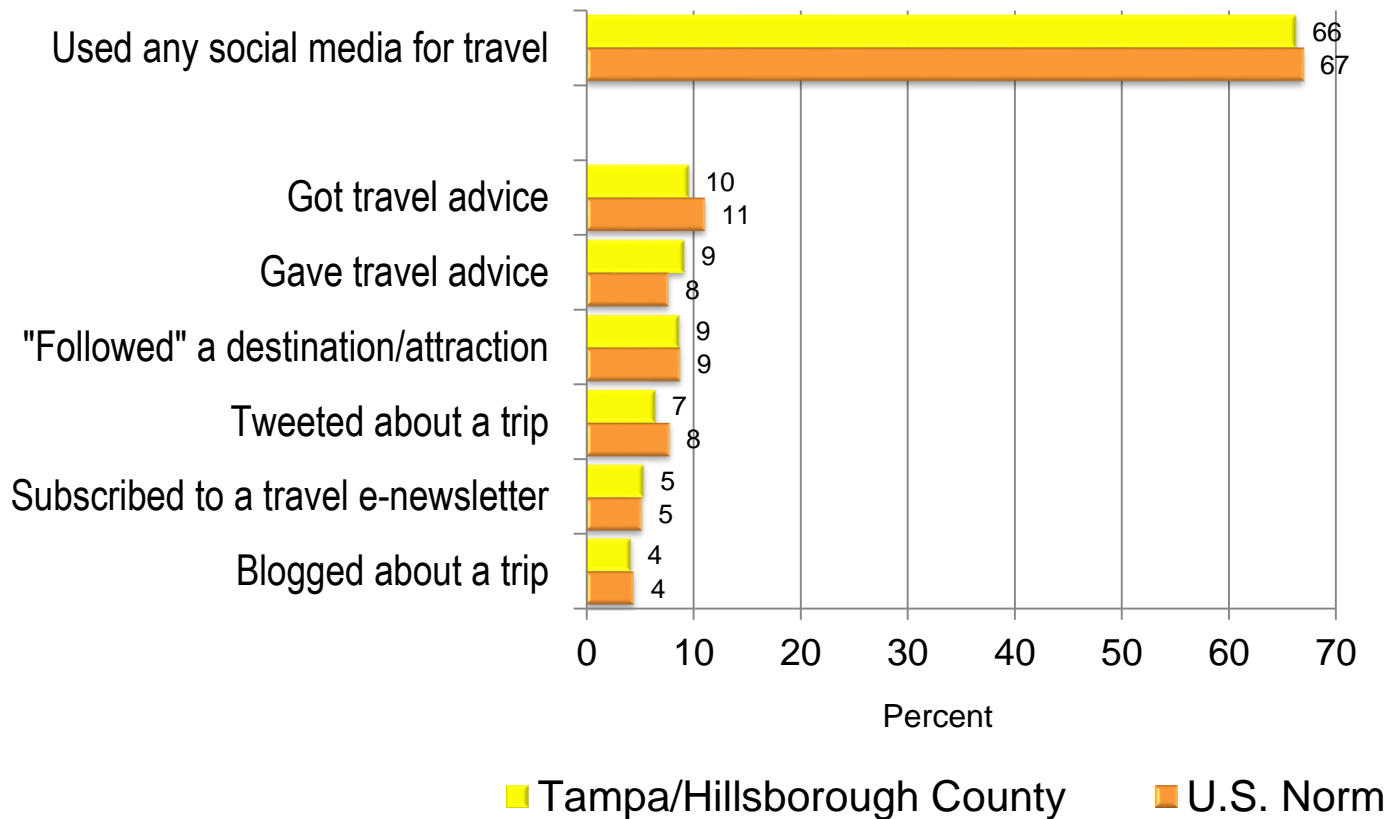
Base: Total Day Person-Trips



Online Social Media Use by Travelers (Cont'd)



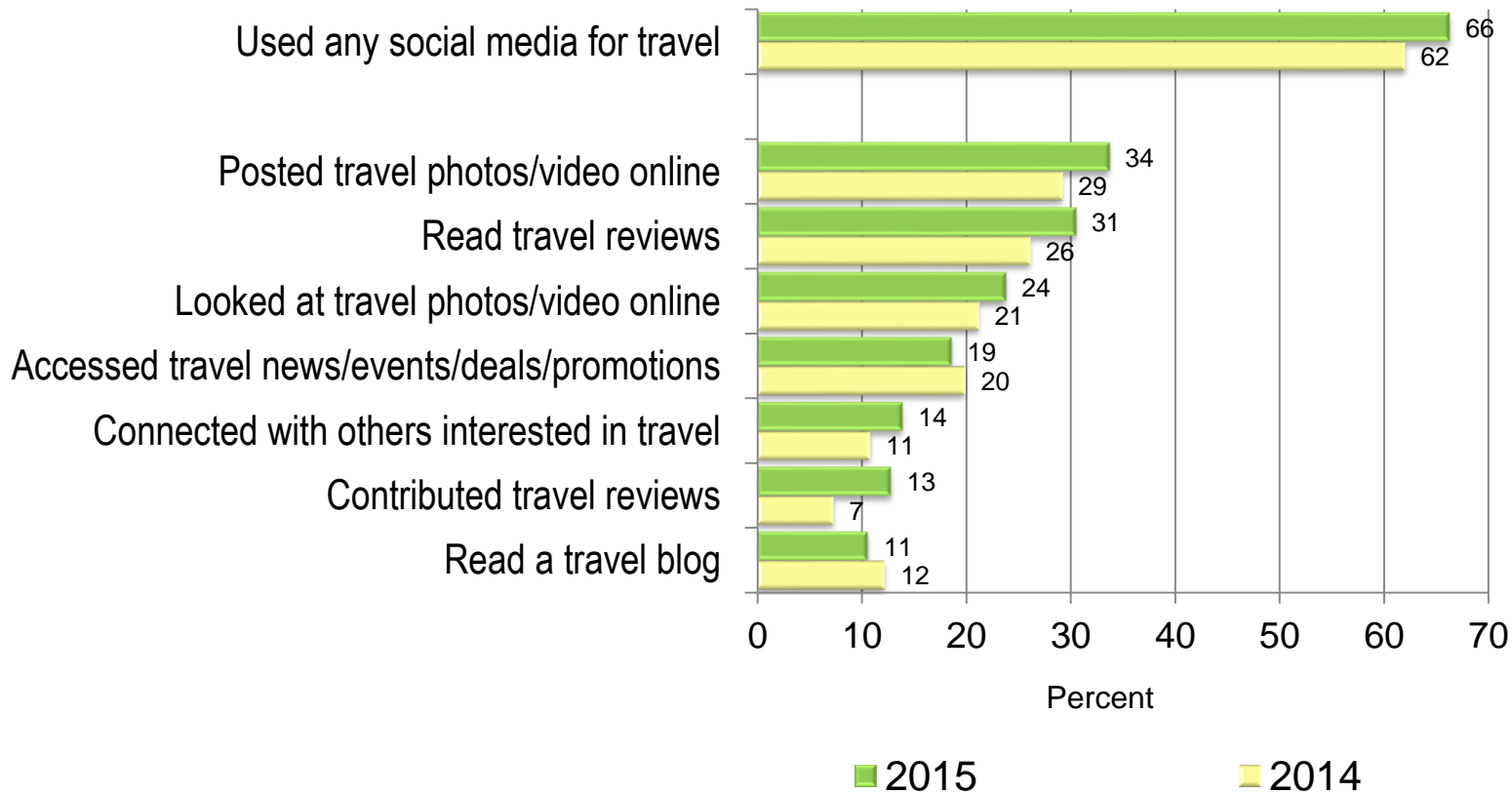
Base: Total Day Person-Trips



Use of Social Media for Travel to Tampa/Hillsborough County – 2015 vs. 2014



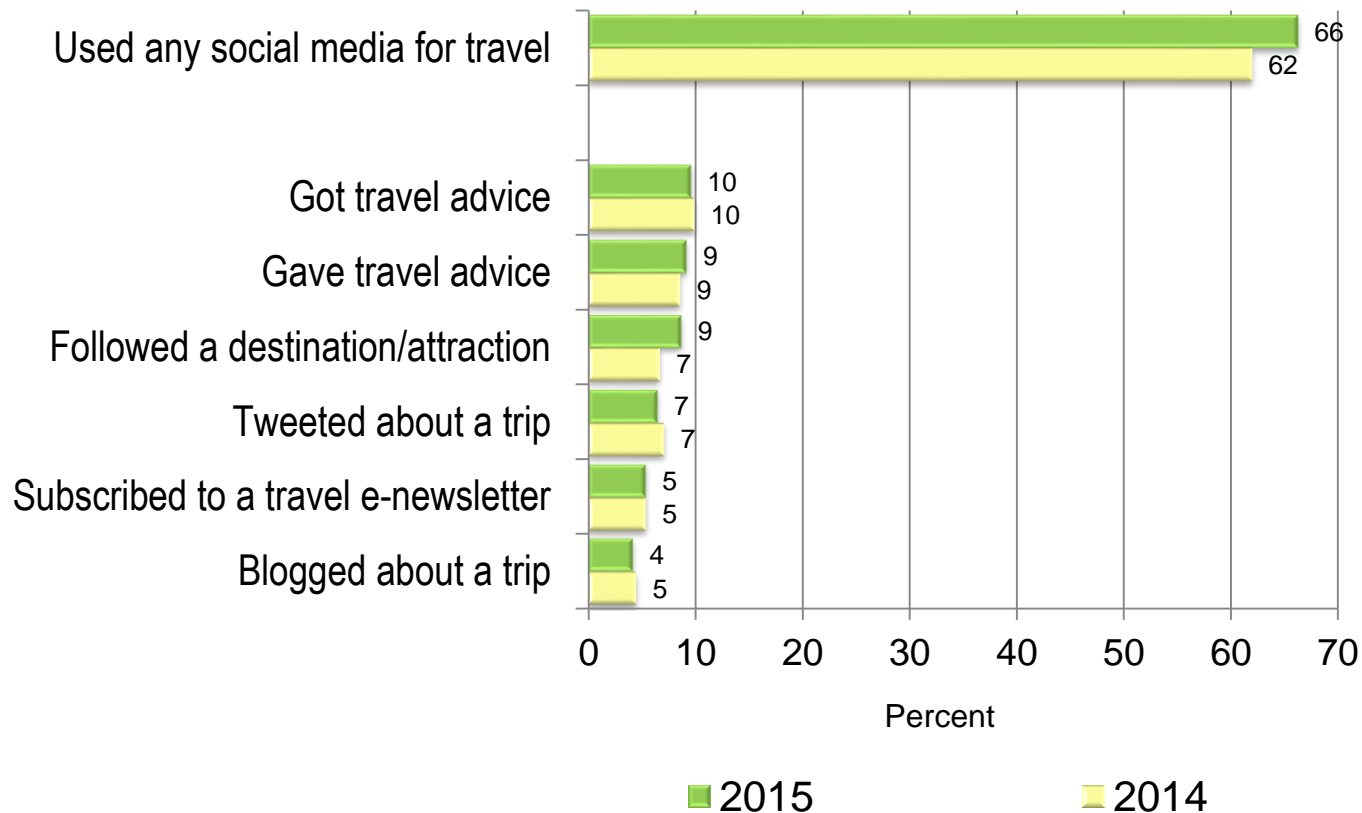
Base: Total Day Person-Trips



Use of Social Media for Travel to Tampa/Hillsborough County – 2015 vs. 2014 (Cont'd)



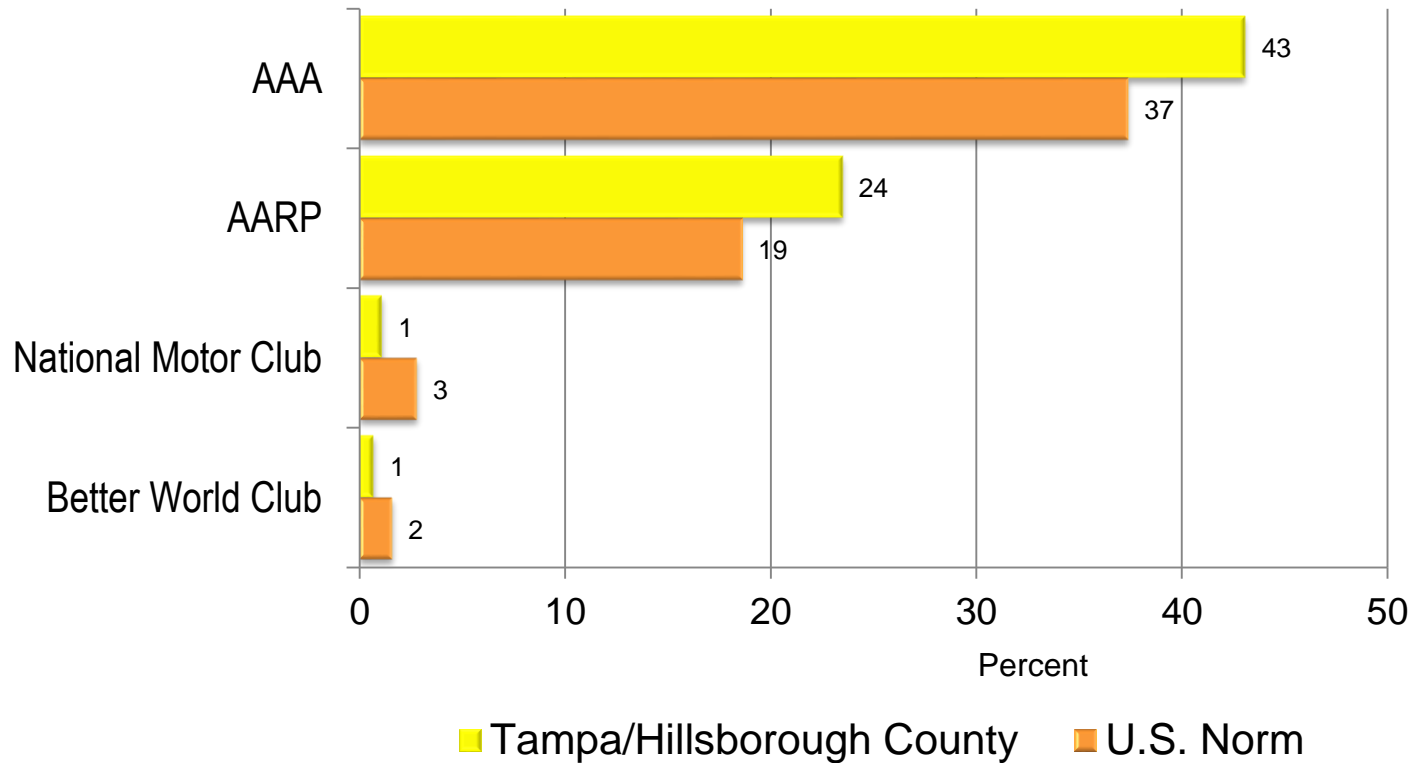
Base: Total Day Person-Trips



Organization Membership



Base: Total Day Person-Trips



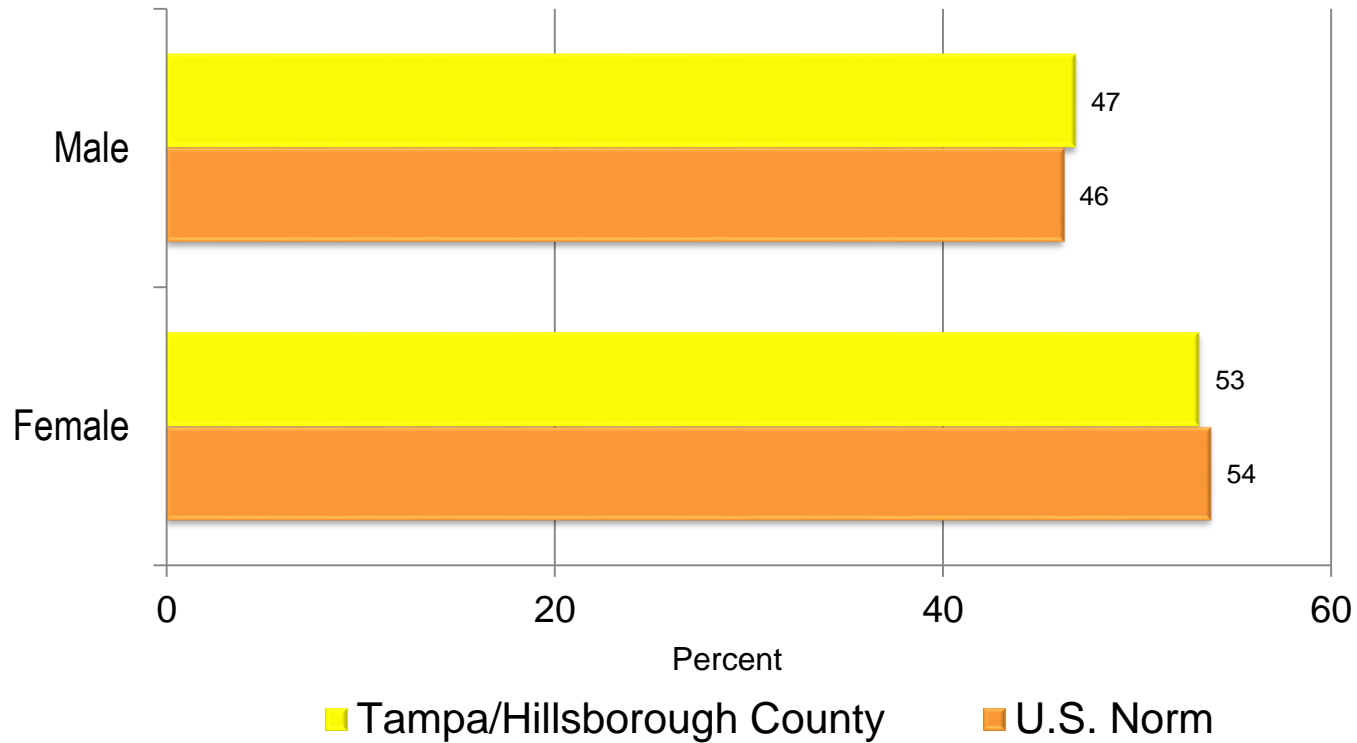


Demographic Profile of Day Visitors

Gender



Base: Total Day Person-Trips



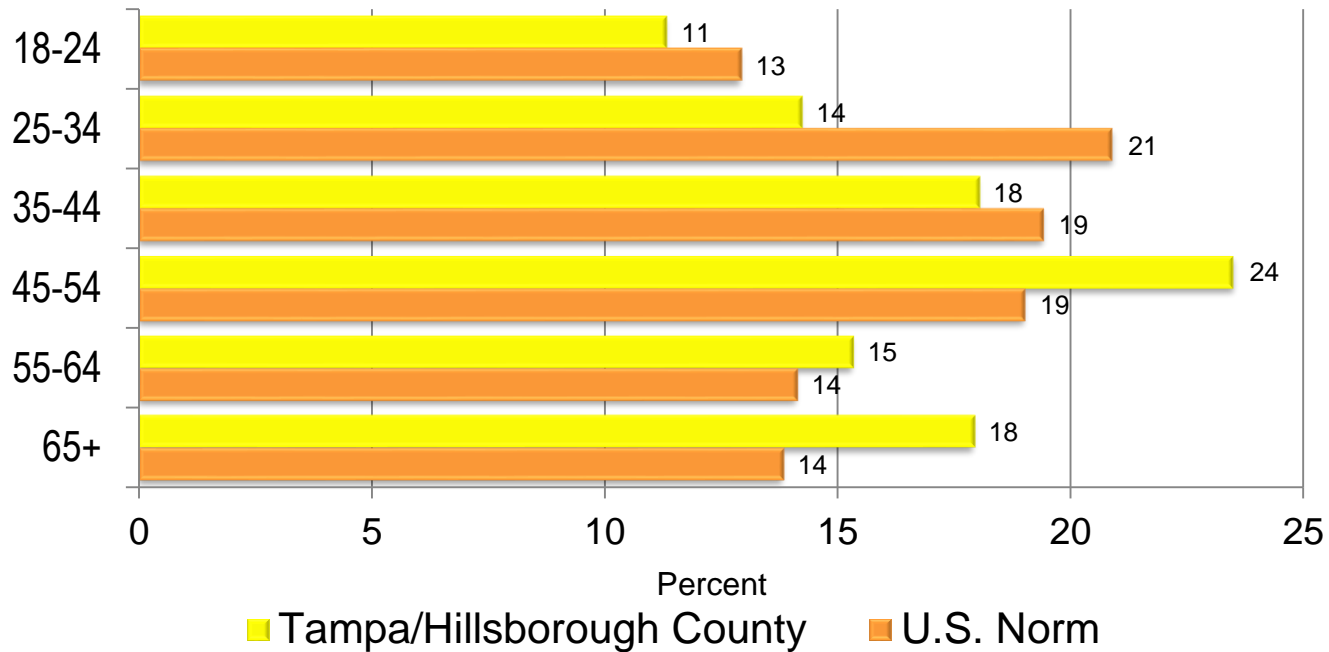
Age



Base: Total Day Person-Trips

Average Tampa/Hillsborough County = 47.2

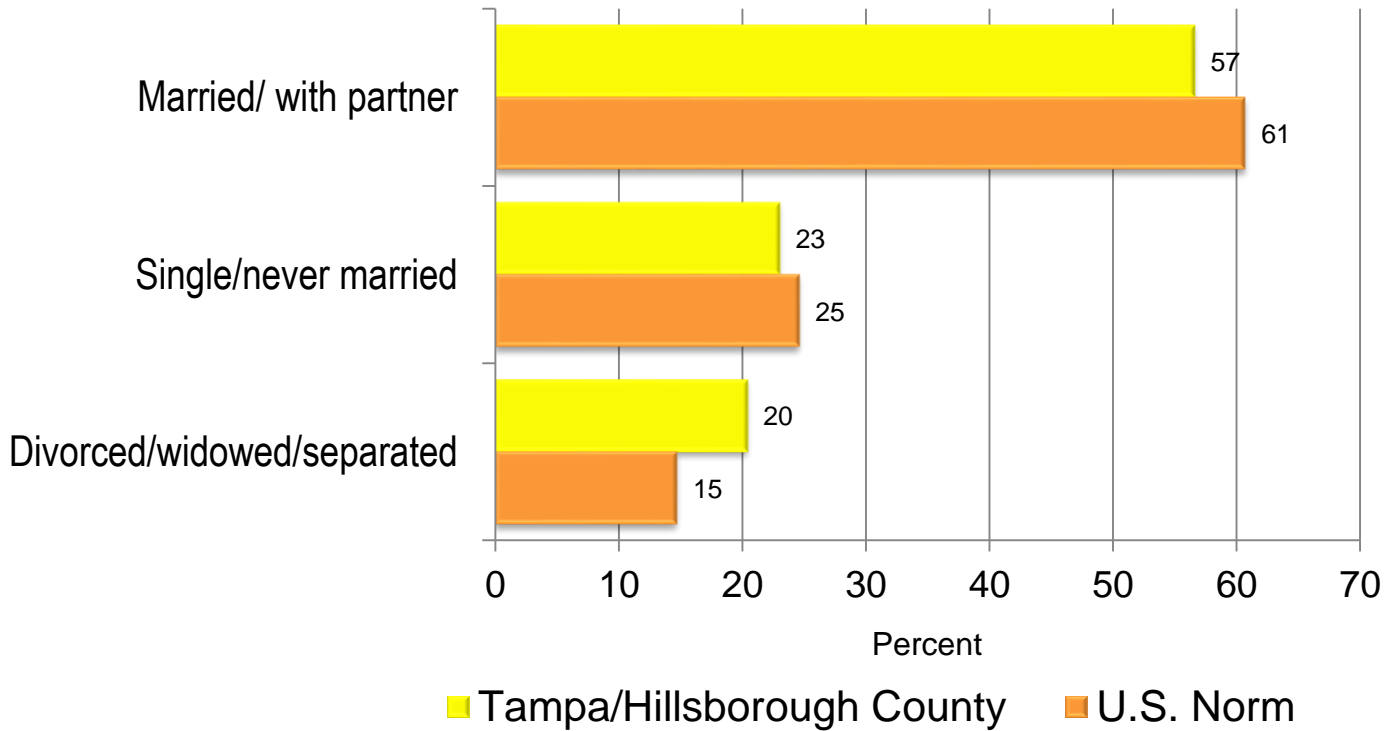
Average U.S. Norm = 44.3



Marital Status



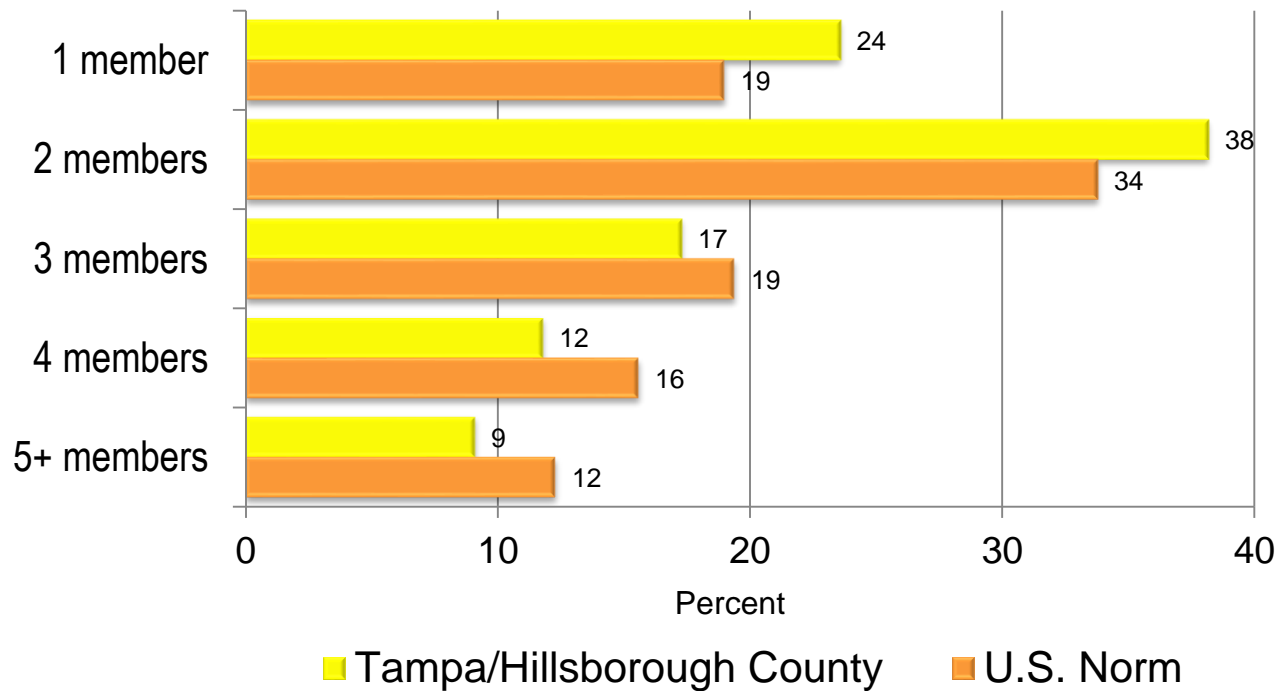
Base: Total Day Person-Trips



Household Size



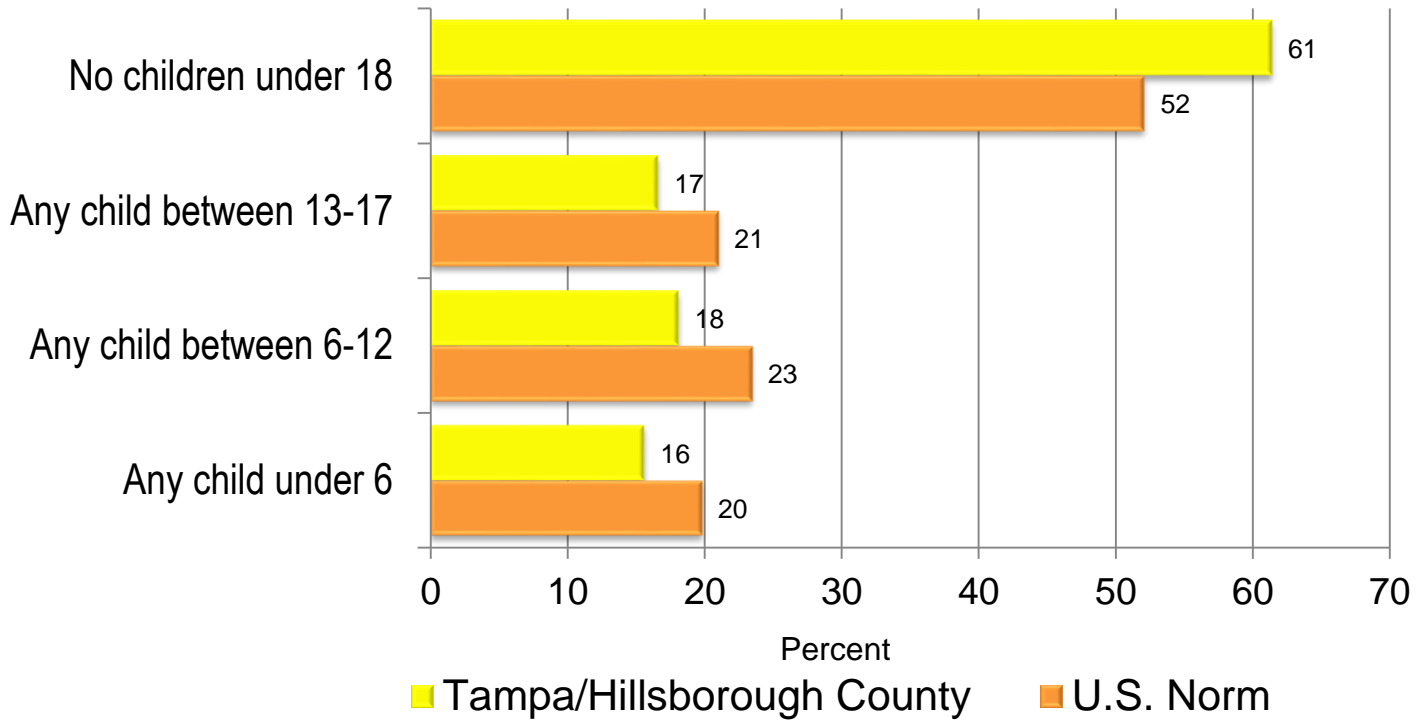
Base: Total Day Person-Trips



Children in Household



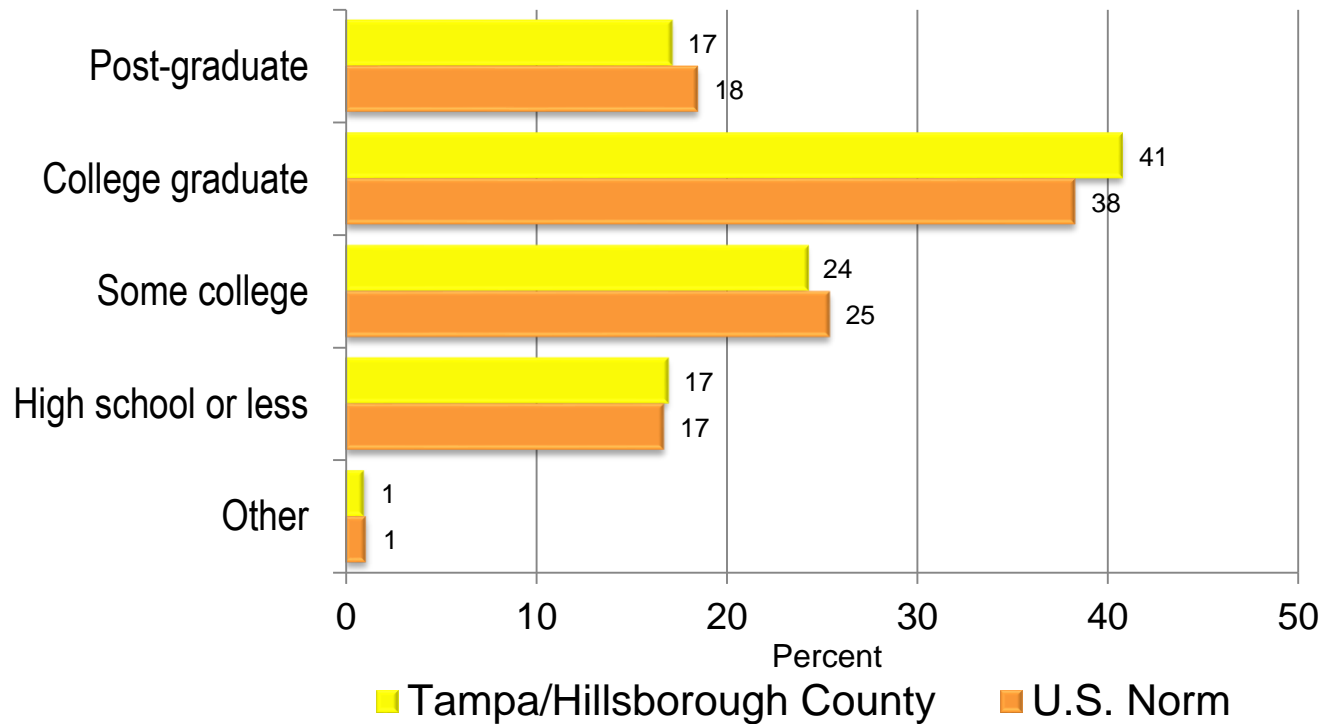
Base: Total Day Person-Trips



Education



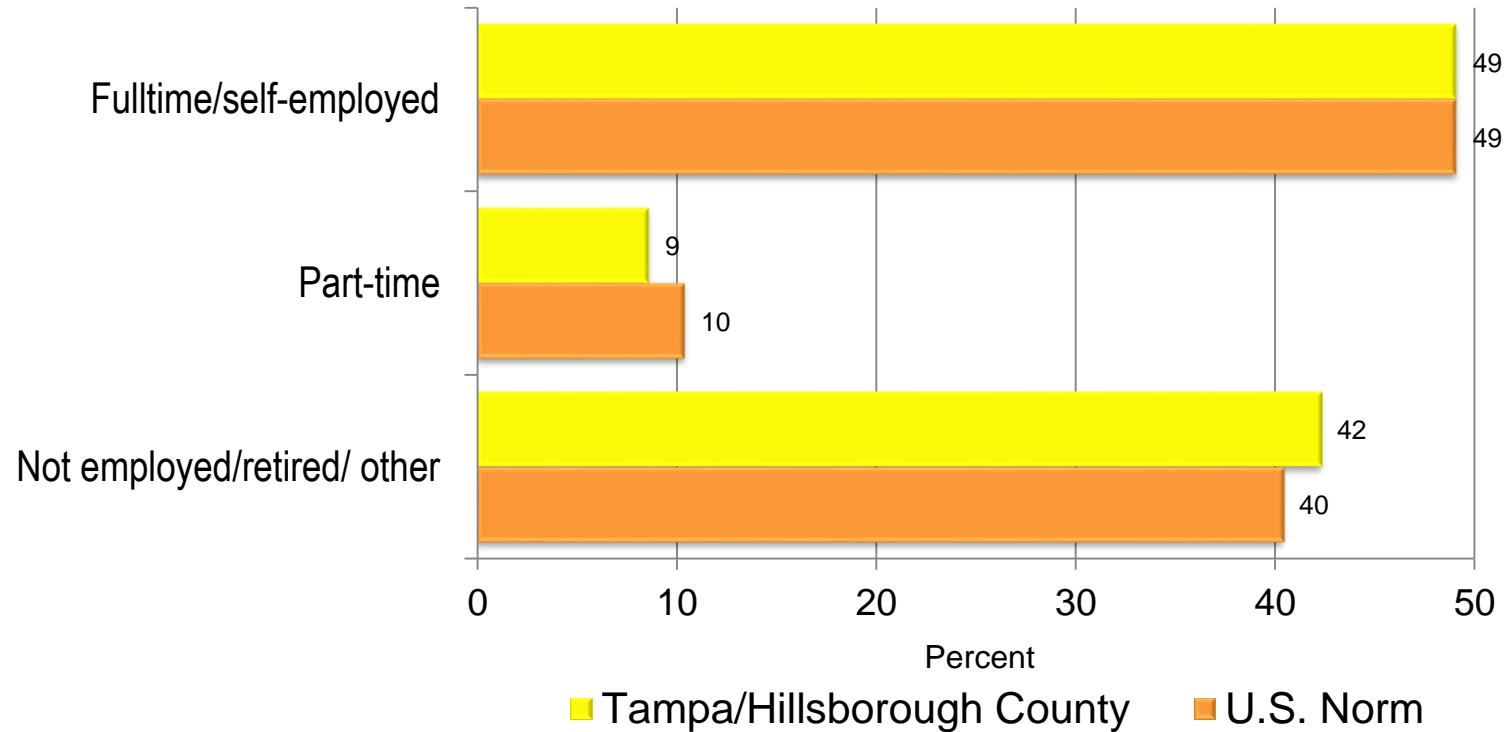
Base: Total Day Person-Trips



Employment



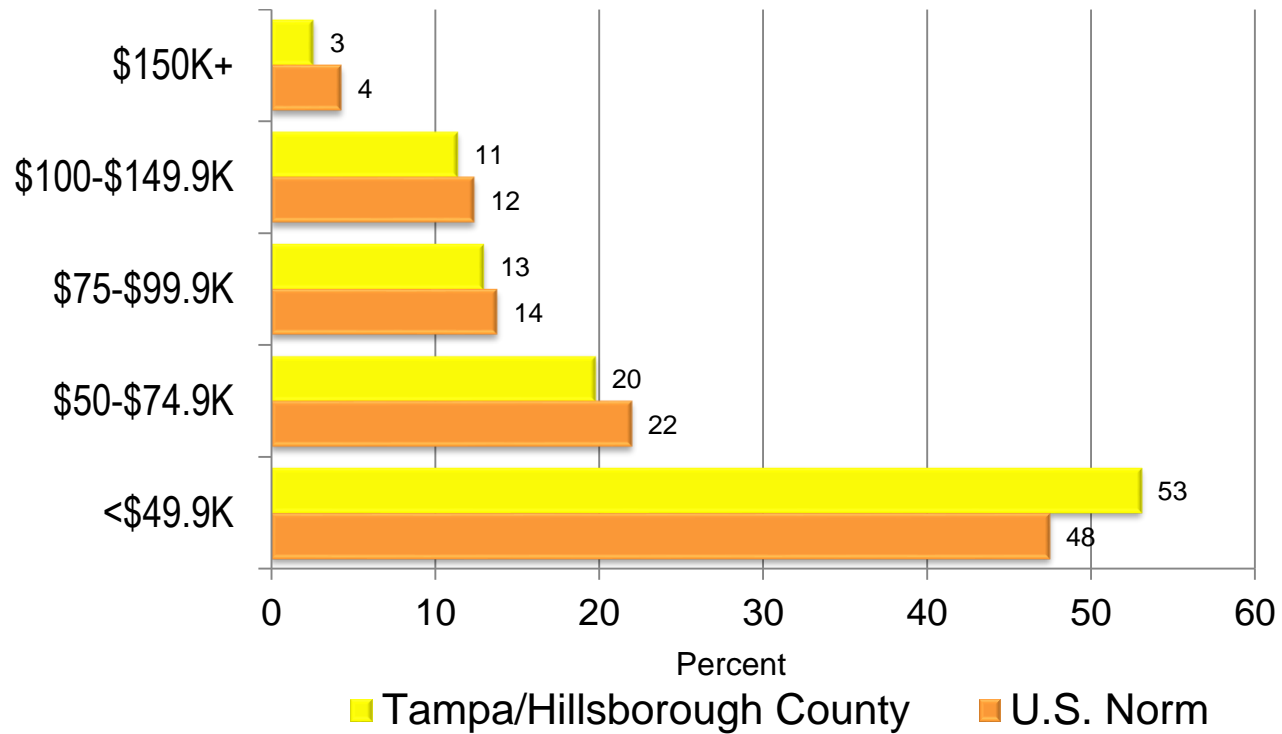
Base: Total Day Person-Trips



Household Income



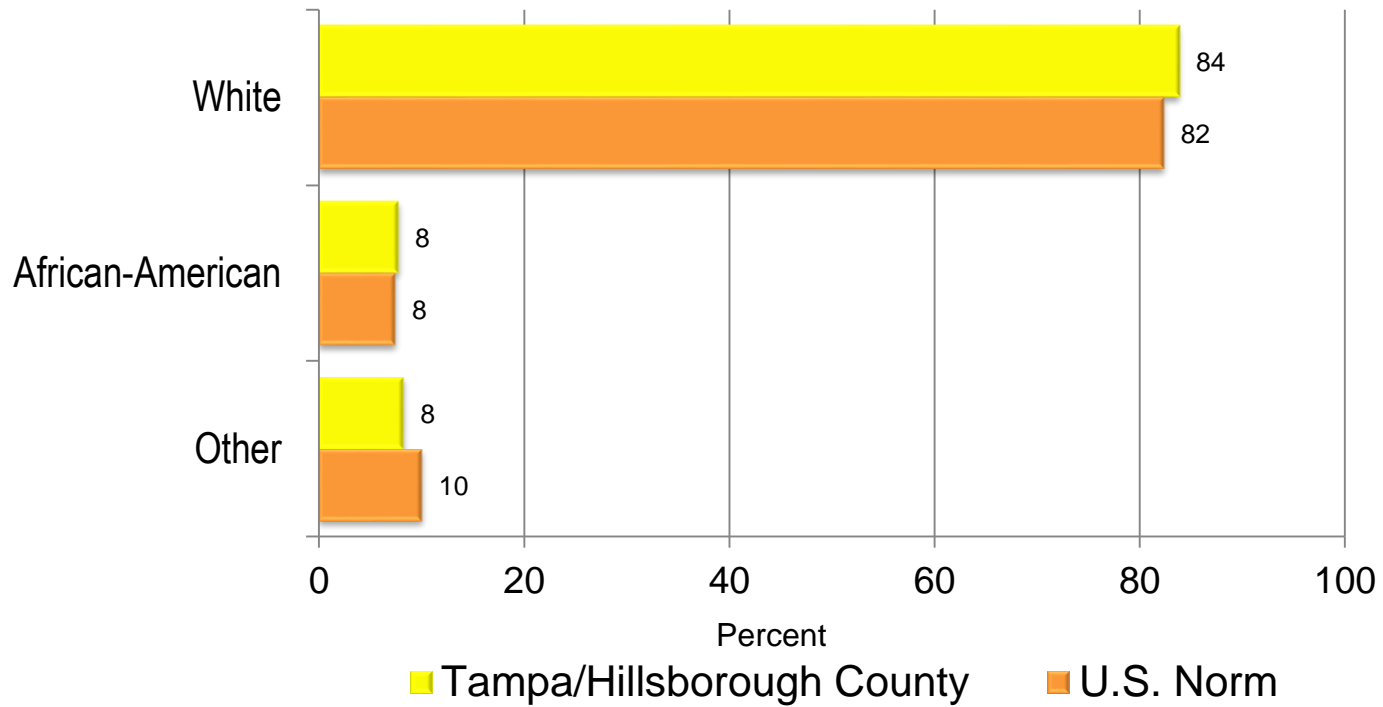
Base: Total Day Person-Trips



Race



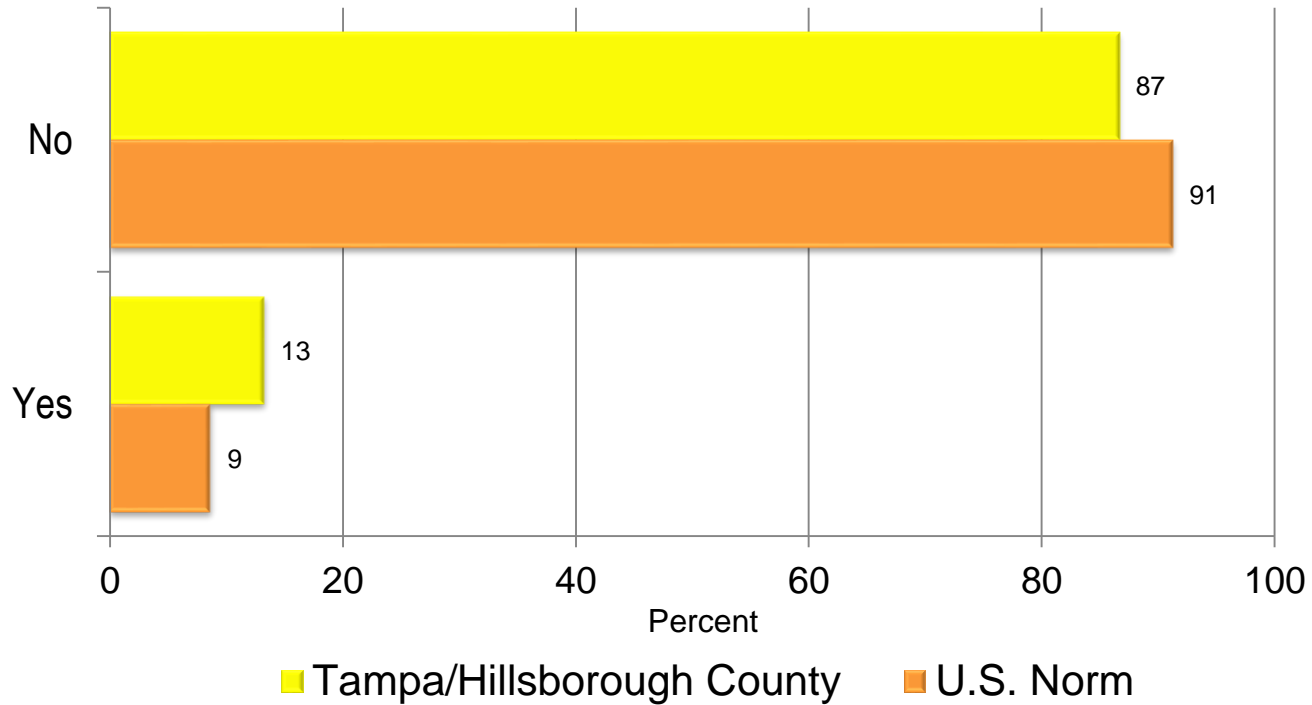
Base: Total Day Person-Trips



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