Longwoods INTERNATIONAL

Amir Eylon
President & CEO

I Have Two Versions of My Presentation…

OR

Hey… Who is Longwoods International???

- Established in 1978 as consultancy-focused research company

- Tourism since 1985

- Travel USA ® since 1990

➢Bottom Line: A market research consultancy with over forty years of experience that specializes in the travel and tourism industry!

What Do We Do?

- **Travel USA® - Visitor Research**

- **Advertising Effectiveness Research – R.O.I.**

- **Resident & Travel Sentiment Research**

- **Image Research – Including "Halo Effect"**

- **Custom Research – Testing, Focus Groups, etc…**

- **Consulting**

Warning: I Have A Lot of Content!

➢I DO NOT get paid by the slide!

➢I will move quickly!

➢I will leave this presentation with you!

➢So sit back, relax, and just listen…

Why Surveys?

- A survey is a method of gathering information from a random sample of people to serve as a critical source of data and insights on a given topic in support of informing strategy and/or solving specific questions and opportunities.

- Through surveys, people can describe, compare, or explain their knowledge, attitudes, and behavior.

- Surveys can collect information on a broad range of topics, including personal facts, past behaviors, future intentions, and opinions.

Why Surveys?

- Results are projectable to the population being represented.

- While geolocation data can tell us which travelers with tracked devices have visited, surveys can tell us specifics about those trips, from how much was spent to who was a part of the travel party to what sources they considered while planning the trip.

Research vs. Analytics…

- It's Not An "Either/Or" Scenario…

- A DMO needs BOTH!

- Each tools helps answer different questions.

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Research vs. Analytics…

The Pros of Survey Research:

- Let's You Talk To Your Audience
- Gets You Answers To:

–Who?	- Why?
–What?	- How?
–When?	- How Many?
–Where?	- How Much?

- What Are/Were They Thinking?

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Research vs. Analytics...

The Pros of Data Analytics:

- Almost "Real Time" Analysis of behavior in market or on the path to purchase.

- Valuable clues during campaigns that may allow you to make adjustments or tweak while it's still running.

- Emerging Ability to Track Behavior patterns while visitor is "in-market"

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Research vs. Analytics…

Both Have Limitations:

Survey Research:

- **Most reporting occurs after the fact depending on the type of study.**
- **Costs can vary greatly depending on need.**

Data Analytics:

- **Lacks Holistic View (individual tactics)**
- **Attribution (Limited insights as to cause & effect)**
- **Anonymity (What's the purpose of travel, who are these people, etc..)**

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Research vs. Analytics…

However:

Organizations using BOTH tools can maximize insights about their marketing efforts as well as build a solid story for specific stakeholder audiences using multiple sources to demonstrate their point!

Which leads me to this…

Research vs. Analytics…

Amir's Golden Rule of Using Data:

Whenever possible:

TRIANGULATE YOUR DATA!!!

- **Holistic picture**
- **Adds credibility**
- **Harder to dismiss or refute**

Longwoods Travel USA® Methodology

- Begun in 1990, Longwoods Travel USA® is the largest, longest running American domestic trip tracking study in the U.S. This syndicated research study is conducted quarterly.

- Travel USA® provides our clients with more reliable data and greater ability to home in on key market segments of interest.

- This report provides an overview for Georgia's domestic tourism business in 2019.

- 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. For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

- For Georgia, the following sample was achieved in 2019:

Overnight Base:
5,833

Day Base:
2,869

Travel USA Visitor Profile

Overnight Visitation

2019

Size and Structure of Georgia's Domestic Travel Market

Overnight Trips to Georgia
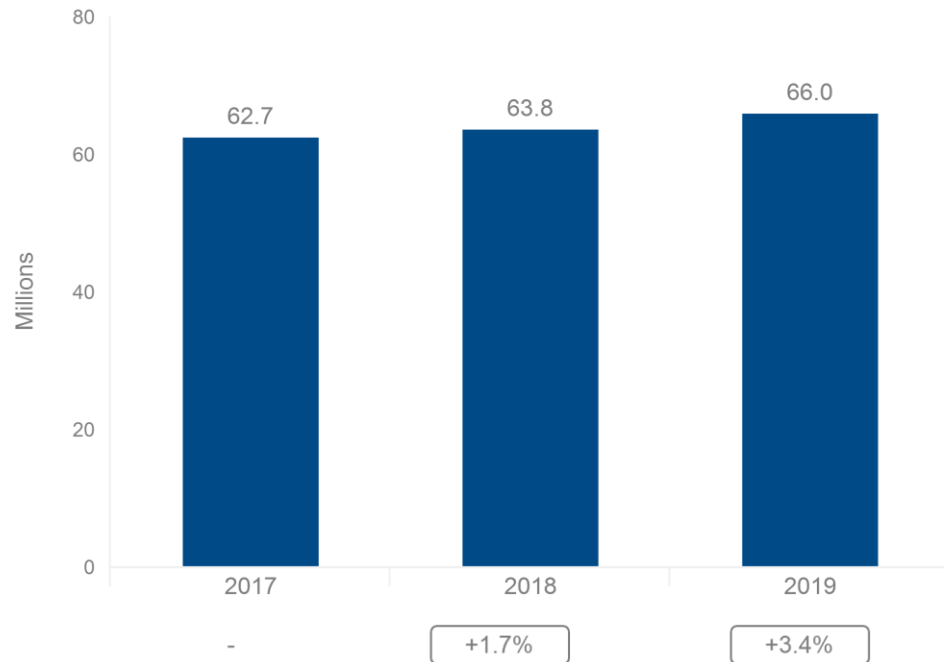
2017	2018	2019
62.7	63.8	66.0
-	+1.7%	+3.4%

Total Size of Georgia 2019 Domestic Travel Market

Total Person-Trips

150.9 Million

+3.2% vs. last year

- Day
  56% | **84.9 Million**
- Overnight
  44% | **66.0 Million**

Size of Georgia Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips

66.0 Million
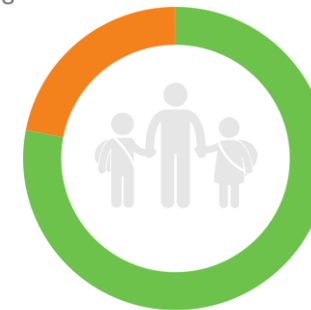
- Adults
  78% | **51.3 Million**
- Children
  22% | **14.6 Million**

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Georgia's Overnight Trip Expenditures

Domestic Overnight Expenditures - by Sector

Total Spending

$ 13.804 Billion

+6.2% vs. last year

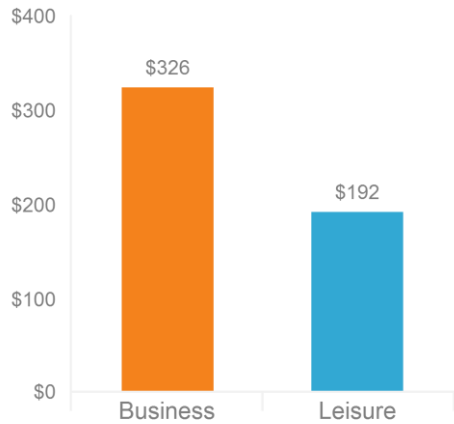**Lodging**
39% | $5,427 Million

Transportation at Destination
11% | $1,555 Million

Restaurant Food & Beverage
23% | $3,244 Million

Retail Purchase
15% | $2,056 Million
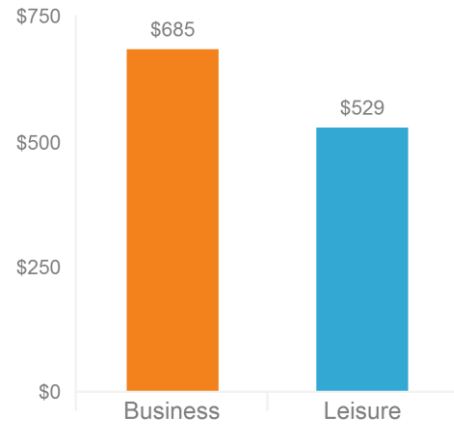
Recreation/Entertainment
11% | $1,523 Million

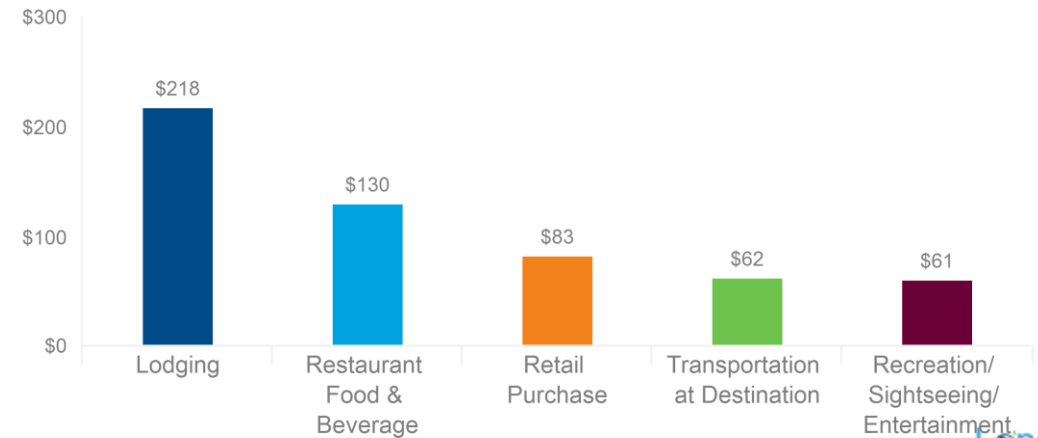## Average Per Person Expenditures on Domestic Overnight Trips - by Sector
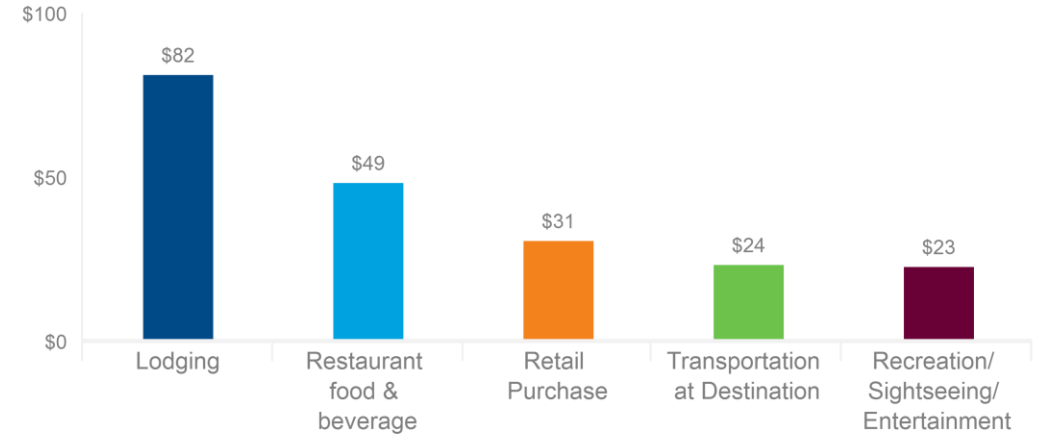
- Lodging: $82
- Restaurant food & beverage: $49
- Retail Purchase: $31
- Transportation at Destination: $24
- Recreation/Sightseeing/Entertainment: $23

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

- Business: $326
- Leisure: $192

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

- Business: $685
- Leisure: $529

Average Per Party Expenditures on Domestic Overnight Trips - by Sector

- Lodging: $218
- Restaurant Food & Beverage: $130
- Retail Purchase: $83
- Transportation at Destination: $62
- Recreation/Sightseeing/Entertainment: $61

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Georgia's Overnight Trip Characteristics

Main Purpose of Trip

46%
Visiting friends/ relatives

10%
Touring

8%
Special event

7%
City trip

4%
Outdoors

3%
Resort

3%
Theme park
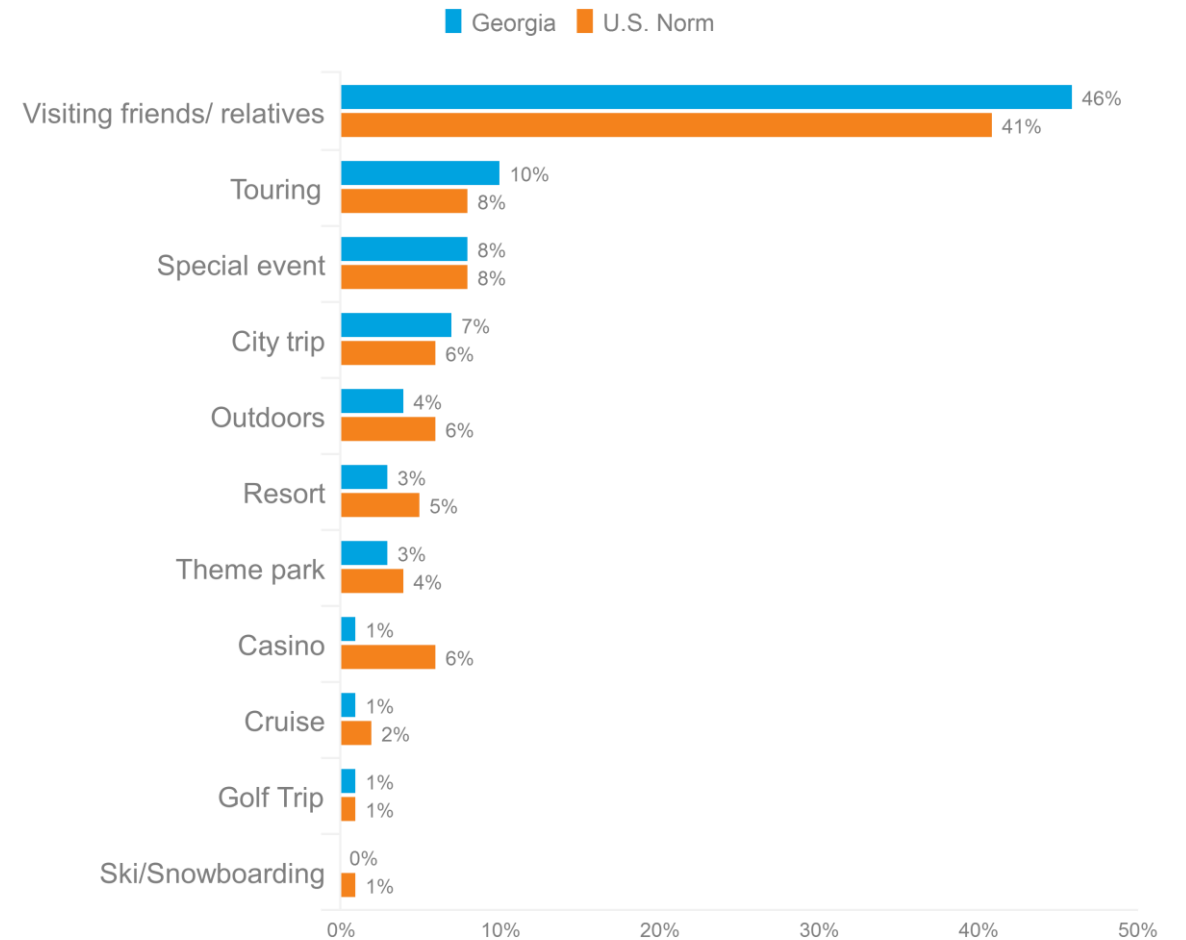
1%
Casino

5%
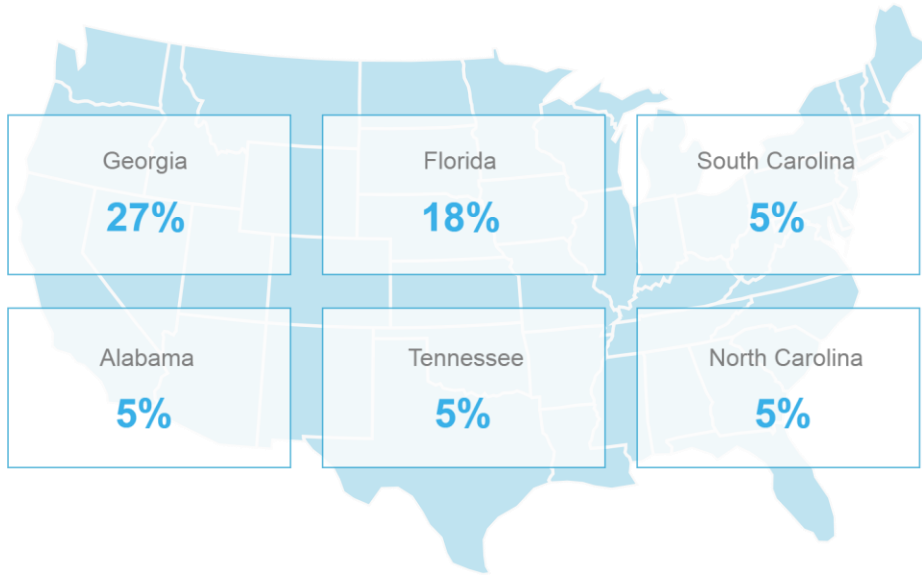Conference/ Convention

7%
Other business trip

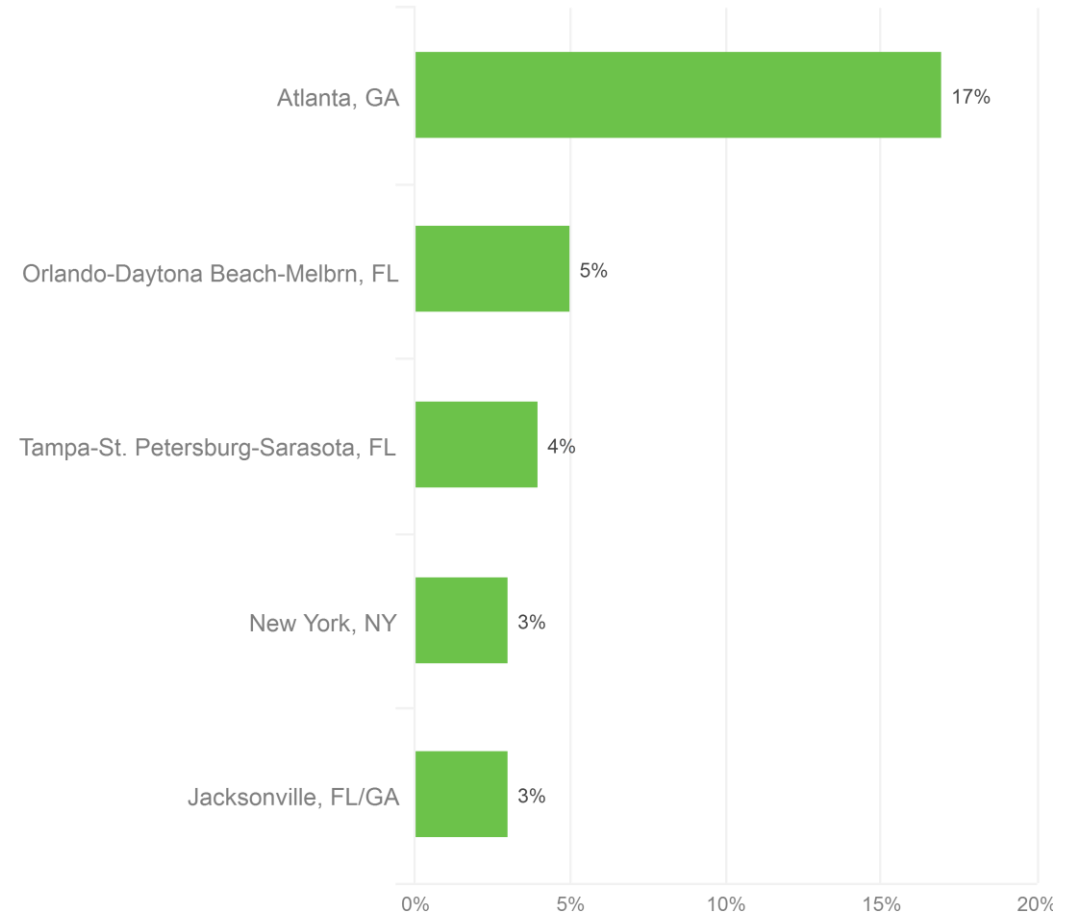**4%**
Business-Leisure

Main Purpose of Leisure Trip

Legend: ■ Georgia ■ U.S. Norm

Purpose	Georgia	U.S. Norm
Visiting friends/ relatives	46%	41%
Touring	10%	8%
Special event	8%	8%
City trip	7%	6%
Outdoors	4%	6%
Resort	3%	5%
Theme park	3%	4%
Casino	1%	6%
Cruise	1%	2%
Golf Trip	1%	1%
Ski/Snowboarding	0%	1%

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Georgia's Overnight Trip Characteristics

Primary Method of Transportation

			U.S. Norm
Own car/truck		64%	61%
Plane		13%	17%
Rental car		12%	10%
Ride share service (Uber, Lyft, etc.)		3%	3%
Bus		2%	2%
Camper, R.V		1%	1%
Train		1%	2%
Ship/Boat		1%	2%
Traditional taxi cab		1%	1%
Motorcycle		0%	1%
Bicycle		0%	0%

Other Transportation

■ Georgia   ■ U.S. Norm

	Georgia	U.S. Norm
Online Taxi Service	14%	14%
Rental car	13%	13%
Plane	9%	9%
Bus	8%	8%
Taxi Cab	8%	9%
Train	7%	7%
Own car/truck	7%	7%
Motorcycle	7%	6%
Camper, RV	6%	6%
Bicycle	6%	6%

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Georgia's Overnight Trip Characteristics

Method of Booking

Legend: ■ Georgia ■ U.S. Norm

Method	Georgia	U.S. Norm
Hotel or resort	29%	29%
Online travel agencies	21%	18%
Airline/commercial carrier	15%	16%
Travel agent/company	11%	10%
Travel company websites	11%	10%
Auto club/AAA	11%	9%
Destination websites	8%	5%
Short term rental websites	7%	6%
Visitors' bureau/government tourism office	5%	3%
Travel/ski show or exhibition	3%	2%

Accommodations

	Georgia	U.S. Norm
Home of friends or relatives	26%	22%
Other hotel	26%	22%
Motel	22%	16%
Resort hotel	18%	23%
Bed & breakfast	7%	5%
Other	6%	5%
Rented home / condo / apartment	6%	5%

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Georgia: During Trip

% Very Satisfied with Trip

Overall trip experience	★★★★★★★½	76%
Friendliness of people	★★★★★★¾	68%
Quality of accommodations	★★★★★★½	66%
Quality of food	★★★★★★½	65%
Safety and Security	★★★★★★	61%
Cleanliness	★★★★★★	60%
Sightseeing and attractions	★★★★★½	56%
Value for money	★★★★★	53%
Music/nightlife/entertainment	★★★★½	44%

Past Visitation to Georgia

■ 2018 ■ 2019

	Past 12 Months	Ever
2018	64%	85%
2019	64%	86%

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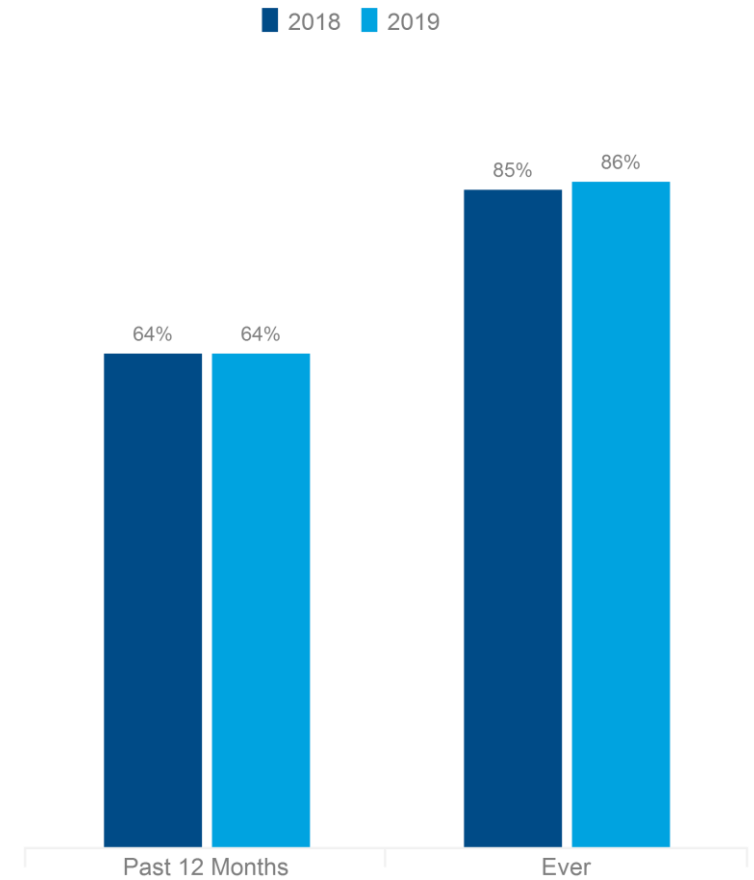
Travel USA Visitor Profile

Day Visitation

2019

Size and Structure of Georgia's Domestic Travel Market

Day Trips to Georgia

Millions

2017	2018	2019
80.4	82.4	84.9
-	+2.4%	+3.0%

Total Size of Georgia 2019 Domestic Travel Market

Total Person-Trips

150.9 Million

+3.2% vs. last year

- Day
  56% | **84.9 Million**
- Overnight
  44% | **66.0 Million**

Size of Georgia Day Travel Market - Adults vs. Children

Total Day Person-Trips

84.9 Million

- Adults
  77% | **65.1 Million**
- Children
  23% | **19.7 Million**

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Georgia's Day Trip Expenditures

Domestic Day Expenditures - by Sector

Total Spending

$ 6.453 Billion

+4.9% vs. last year

- **Transportation at Destination**
  19% | $1,226 Million
- **Restaurant Food & Beverage**
  34% | $2,190 Million
- **Retail Purchase**
  30% | $1,914 Million
- **Recreation/Entertainment**
  17% | $1,123 Million

Average Per Person Expenditures on Domestic Day Trips - by Sector

- Restaurant food & beverage: $26
- Retail Purchase: $23
- Transportation at Destination: $14
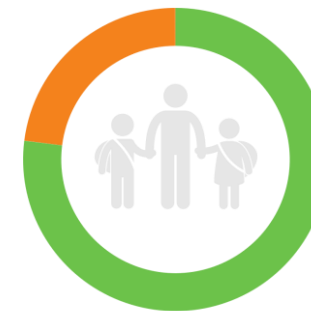- Recreation/Sightseeing/Entertainment: $13

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

- Leisure: $77
- Business: $67

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

- Leisure: $209
- Business: $138

Average Per Party Expenditures on Domestic Day Trips - by Sector

- Restaurant Food & Beverage: $68
- Retail Purchase: $60
- Transportation at Destination: $38
- Recreation/Sightseeing/Entertainment: $35

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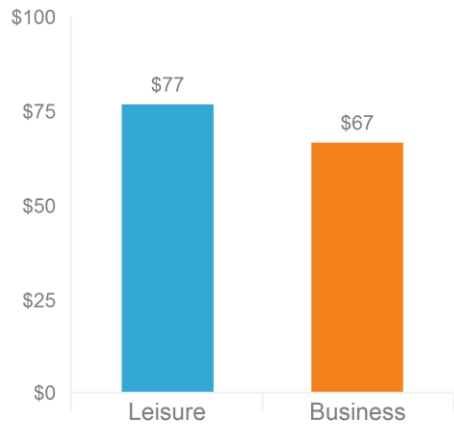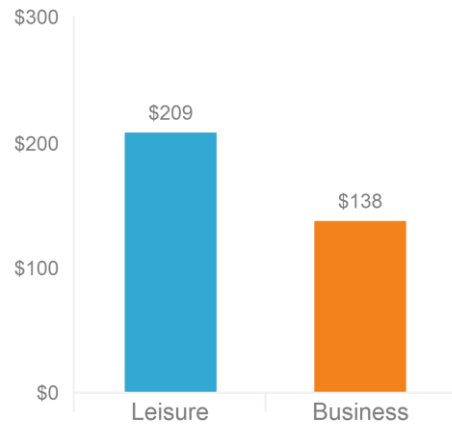
Georgia's Day Trip Characteristics

Base: 2019 Day Person-Trips

Main Purpose of Trip

39% Visiting friends/ relatives

12% Touring

9% Shopping

8% City trip

8% Special event

7% Outdoors

2% Theme park

2% Resort

2% Conference/ Convention

7% Other business trip

3% Business-Leisure

Main Purpose of Leisure Trip

■ Georgia ■ U.S. Norm

Category	Georgia	U.S. Norm
Visiting friends/ relatives	39%	37%
Touring	12%	11%
Shopping	9%	7%
City trip	8%	8%
Special event	8%	8%
Outdoors	7%	7%
Theme park	2%	3%
Resort	2%	2%
Casino	1%	5%
Cruise	1%	1%
Golf Trip	0%	0%

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Georgia's Day Trip Characteristics

State Origin Of Trip

Georgia **51%**	Florida **13%**	Alabama **7%**
South Carolina **7%**	Tennessee **5%**	North Carolina **3%**

Season of Trip
Total Day Person-Trips

Jan - Mar **25%**	Apr - Jun **25%**
Jul - Sep **25%**	Oct - Dec **25%**

DMA Origin Of Trip

DMA	%
Atlanta, GA	33%
Savannah, GA/SC	4%
Greenville-Spartanburg-Asheville, SC	4%
Chattanooga, TN	4%
Columbus, GA	3%
Macon, GA	3%
Orlando-Daytona Beach-Melbrn, FL	3%
Jacksonville, FL/GA	3%
Albany, GA	3%

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Georgia: During Trip
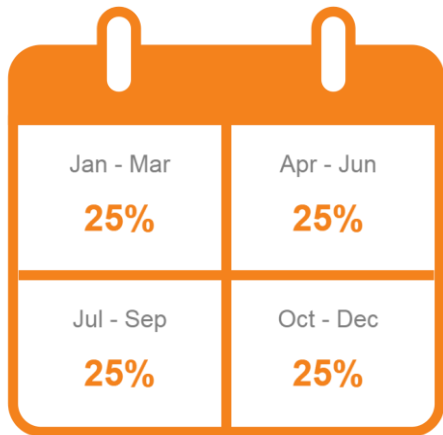
Activities and Experiences (Top 10)

Shopping	Landmark/historic site	Museum	National/state park	Beach/waterfront
29%	**10%**	**9%**	**7%**	**6%**
U.S. Norm 24%	U.S. Norm 7%	U.S. Norm 7%	U.S. Norm 6%	U.S. Norm 7%

Fine/upscale dining	Bar/nightclub	Hiking/backpacking	Theme park	Fishing
6%	**6%**	**5%**	**5%**	**5%**
U.S. Norm 6%	U.S. Norm 5%	U.S. Norm 5%	U.S. Norm 5%	U.S. Norm 3%

Activities of Special Interest (Top 5)
Georgia

Historic places	22%
Cultural activities/Attractions	15%
Exceptional Culinary Experiences	9%
Brewery Tours/Beer Tasting	4%
Religious Travel	4%

Activities of Special Interest (Top 5)
U.S. Norm

Historic places	17%
Cultural activities/Attractions	13%
Exceptional Culinary Experiences	7%
Brewery Tours/Beer Tasting	5%
Winery Tours/Tasting	5%

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THANK YOU!!!

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