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...
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.
Research vs. Analytics…

The Pros of Survey Research:

- Let’s You Talk To Your Audience
- Gets You Answers To:
  - Who?
  - What?
  - When?
  - Where?
  - Why?
  - How?
  - How Many?
  - How Much?
  - What Are/Were They Thinking?
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”
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..)
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...
Amir’s Golden Rule of Using Data:
Whenever possible: TRIANGULATE YOUR DATA!!!

• Holistic picture
• Adds credibility
• Harder to dismiss or refute
• 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:

<table>
<thead>
<tr>
<th>Overnight Base</th>
<th>Day Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,833</td>
<td>2,869</td>
</tr>
</tbody>
</table>
Travel USA Visitor Profile

Overnight Visitation

2019
Size and Structure of Georgia’s Domestic Travel Market

**Total Size of Georgia 2019 Domestic Travel Market**

- **Total Person-Trips**: 150.9 Million
  - +3.2% vs. last year

**Total Overnight Person-Trips**: 66.0 Million

- **Adults**: 78% | 51.3 Million
- **Children**: 22% | 14.6 Million
Georgia's Overnight Trip Expenditures

Domestic Overnight Expenditures - by Sector

Total Spending
$13.804 Billion
+6.2% vs. last year

Average Per Person Expenditures on Domestic Overnight Trips - by Sector

Average Per Party Expenditures on Domestic Overnight Trips - by Sector

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

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

Base: 2019 Overnight Person-Trips
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

Main Purpose of Leisure Trip

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

State Origin Of Trip

- Georgia: 27%
- Florida: 18%
- South Carolina: 5%
- Alabama: 5%
- Tennessee: 5%
- North Carolina: 5%

Season of Trip
Total Overnight Person-Trips

- Jan - Mar: 24%
- Apr - Jun: 26%
- Jul - Sep: 25%
- Oct - Dec: 25%

DMA Origin Of Trip

- Atlanta, GA: 17%
- Orlando-Daytona Beach-Melbourne, FL: 5%
- Tampa-St. Petersburg-Sarasota, FL: 4%
- New York, NY: 3%
- Jacksonville, FL/GA: 3%
## Georgia's Overnight Trip Characteristics

### Primary Method of Transportation

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

### Other Transportation

<table>
<thead>
<tr>
<th>Mode</th>
<th>Georgia</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Taxi Service</td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Rental car</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Plane</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Bus</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Taxi Cab</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Train</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Own car/truck</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Motorcycle</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Camper, RV</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
# Georgia's Overnight Trip Characteristics

## Method of Booking

<table>
<thead>
<tr>
<th>Method</th>
<th>Georgia</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel or resort</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td>Online travel agencies</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Airline/commercial carrier</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Travel agent/company</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Travel company websites</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Auto club/AAA</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Destination websites</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Short term rental websites</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Visitors' bureau/government tourism office</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Travel/ski show or exhibition</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

## Accommodations

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Georgia</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home of friends or relatives</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Other hotel</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Motel</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Resort hotel</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Bed &amp; breakfast</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Rented home / condo / apartment</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>
### % Very Satisfied with Trip

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall trip experience</td>
<td><img src="image" alt="5 star rating" /></td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>Friendliness of people</td>
<td><img src="image" alt="5 star rating" /></td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>Quality of accommodations</td>
<td><img src="image" alt="5 star rating" /></td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>Quality of food</td>
<td><img src="image" alt="5 star rating" /></td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>Safety and Security</td>
<td><img src="image" alt="5 star rating" /></td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Cleanliness</td>
<td><img src="image" alt="5 star rating" /></td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>Sightseeing and attractions</td>
<td><img src="image" alt="5 star rating" /></td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td><img src="image" alt="5 star rating" /></td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Music/nightlife/entertainment</td>
<td><img src="image" alt="4 star rating" /></td>
<td>44%</td>
<td></td>
</tr>
</tbody>
</table>

### Past Visitation to Georgia

<table>
<thead>
<tr>
<th>Visitation Type</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>85%</td>
<td>86%</td>
</tr>
<tr>
<td>Past 12 Months</td>
<td>64%</td>
<td>64%</td>
</tr>
</tbody>
</table>
Travel USA Visitor Profile

Day Visitation

2019
Size and Structure of Georgia’s Domestic Travel Market

Day Trips to Georgia

<table>
<thead>
<tr>
<th>Year</th>
<th>Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>80.4</td>
</tr>
<tr>
<td>2018</td>
<td>82.4</td>
</tr>
<tr>
<td>2019</td>
<td>84.9</td>
</tr>
</tbody>
</table>

Total Person-Trips

150.9 Million
+3.2% vs. last year

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

Base: 2019 Day Person-Trips
Georgia's Day Trip Expenditures

Domestic Day Expenditures - by Sector

Total Spending
$6.453 Billion
+4.9% vs. last year

Average Per Person Expenditures on Domestic Day Trips - by Sector

- 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 Party Expenditures on Domestic Day Trips - by Sector

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

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

Base: 2019 Day Person-Trips
Georgia's Day Trip Characteristics

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

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

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

DMA Origin Of Trip

- Atlanta, GA: 33%
- Savannah, GA/SC: 4%
- Greenville-Spartanburg-Asheville, SC: 4%
- Chattanooga, TN: 4%
- Columbus, GA: 3%
- Macon, GA: 3%
- Orlando-Daytona Beach-Melbr, FL: 3%
- Jacksonville, FL/GA: 3%
- Albany, GA: 3%
# Activities and Experiences (Top 10)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Landmark/historic site</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Museum</td>
<td>9%</td>
<td>U.S. Norm</td>
</tr>
<tr>
<td>National/state park</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Beach/waterfront</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Fine/upscale dining</td>
<td>6%</td>
<td>U.S. Norm</td>
</tr>
<tr>
<td>Bar/nightclub</td>
<td>6%</td>
<td>U.S. Norm</td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td>5%</td>
<td>U.S. Norm</td>
</tr>
<tr>
<td>Theme park</td>
<td>5%</td>
<td>U.S. Norm</td>
</tr>
<tr>
<td>Fishing</td>
<td>5%</td>
<td>U.S. Norm</td>
</tr>
</tbody>
</table>

## Activities of Special Interest (Top 5)

### Georgia

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic places</td>
<td>22%</td>
</tr>
<tr>
<td>Cultural activities/Attractions</td>
<td>15%</td>
</tr>
<tr>
<td>Exceptional Culinary Experiences</td>
<td>9%</td>
</tr>
<tr>
<td>Brewery Tours/Beer Tasting</td>
<td>4%</td>
</tr>
<tr>
<td>Religious Travel</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic places</td>
<td>17%</td>
</tr>
<tr>
<td>Cultural activities/Attractions</td>
<td>13%</td>
</tr>
<tr>
<td>Exceptional Culinary Experiences</td>
<td>7%</td>
</tr>
<tr>
<td>Brewery Tours/Beer Tasting</td>
<td>5%</td>
</tr>
<tr>
<td>Winery Tours/Tasting</td>
<td>5%</td>
</tr>
</tbody>
</table>
THANK YOU!!!

How to reach me:

Amir Eylon

aeylon@longwoods-intl.com
Longwoods-intl.com
Facebook: @LongwoodsInternational
Twitter: @Lngwds