



Visit Idaho Image Study Highlights

ANNA BLOUNT
October 2023





WHO WE ARE

Established in 1978 as a market research consultancy

Headquartered in Columbus, OH and Toronto, ON

Focused in tourism since 1985

Working with over 175 Destinations and Brands



AGENDA

- Visitor Targeting & Importance of Trip Satisfaction
- Visit Idaho Advertising Awareness
- Reputation as a Leisure Travel Destination
- Idaho vs. Competitive Set
- Halo Effect
- Idaho Resident Sentiment Study Launch
- Key Takeaways
- Questions

2022 Visit Idaho Image Study

This study specifically profiled:

- Key travel motivators for Idaho's advertising markets
- Image of Idaho in the areas that are important to travelers
- Idaho's image strengths and weaknesses versus competitors
- Reputational lift of Visit Idaho's campaign as well as recent visitation
- The "halo effect" of Idaho's tourism advertising
- 1,512 respondents in primary regional advertising market DMAs, in-field March 29 – April 5, 2023.

2022 Idaho Travel USA®

- Largest and longest-running domestic trip tracking study in the U.S., representative of all leisure and business trips taken by Americans within the country.
- Fielded quarterly.
- 2,203 overnight and day trips to Idaho.
- Provides comprehensive visitor data for DMOs, everything from the number of visitors, where they came from, how much they spent, primary purpose of their trip, length of stay, planning, booking, etc.



01

Visitor Targeting & Importance of Trip Satisfaction



2021 Idaho Domestic Visitor Volumes



40% Overnight

14.8 million trips

60% Day

22.2 million trips

Small Shifts Can Make Big Differences

1% = 148,200

In 2021, each overnight visitation percentage point represents almost 150,000 trips to Idaho

2022 Idaho Overnight Domestic Visitor Volumes – Out-of-State/Idaho Residents



82% Out-of-State Visitors

Los Angeles – 8%

Salt Lake City – 6%

Seattle – 6%

18% Idaho Residents

2022 Idaho Overnight Trips – Overall Trip Transportation



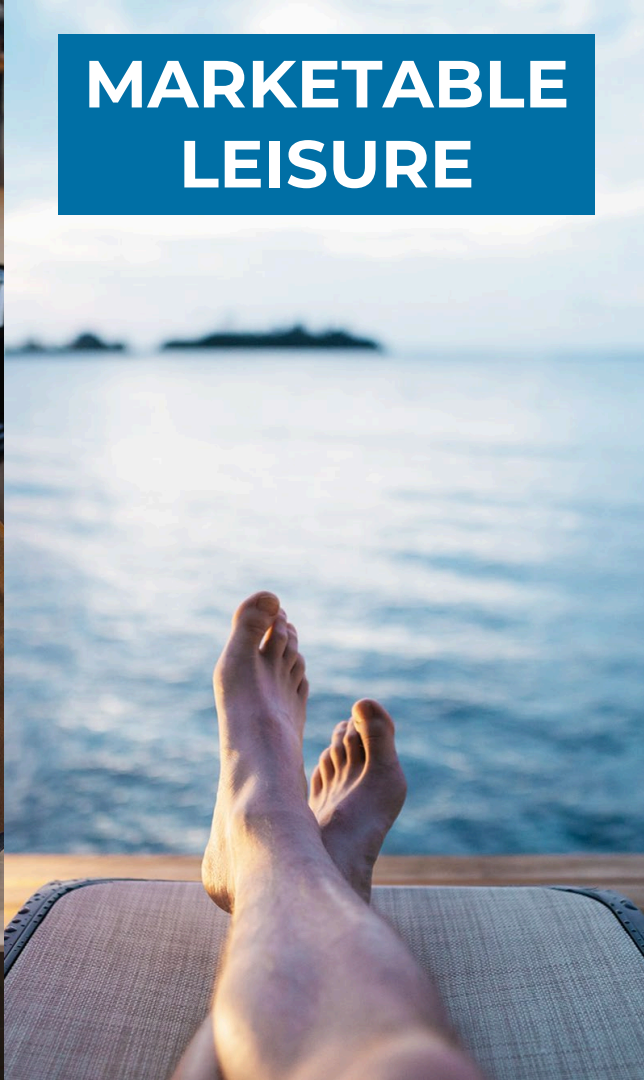
27% of Idaho overnight trips
in 2022 involved travelers flying
to the destination.

Own car/truck: **67%**



BUSINESS

**MARKETABLE
LEISURE**



IDAHO **Longwoods**
visitidaho.org INTERNATIONAL

VFR

2022 Idaho Overnight Trips – Trip Type

Visiting Friends & Relatives: 34%

Marketable Leisure: 54%

Business: 12%



Visiting Friends &
Relatives

34%



City trip

6%



Outdoors

13%



Business-leisure

5%



Touring

11%



Business

4%



Special event

7%



Casino

4%

2022 Idaho Overnight Trips – Activities



Shopping

22%



Museum

14%



Sightseeing

22%



National/state park

14%



Attending celebration

20%



Swimming

14%



Landmark/historic site

17%



Local parks/
playgrounds

13%



Hiking/backpacking

14%



Nature tours/wildlife
viewing/birding

13%

2022 Idaho Overnight Trips - Satisfaction



70%

of Idaho's 2022 overnight visitors were very satisfied with their trip



Safety/security

57%



Friendliness of people

57%



Sightseeing/attractions

55%



Quality of Accommodations

53%



Cleanliness

52%

Curated Visitation = Higher Satisfaction



Highly satisfied with Idaho overnight trip

72% - participated in at least one of the 69 primary activities tracked in Travel USA[®]

59% - Didn't participate in any of the primary tracked activities.

02

Visit Idaho Advertising Awareness





2022 Visit Idaho Image Study

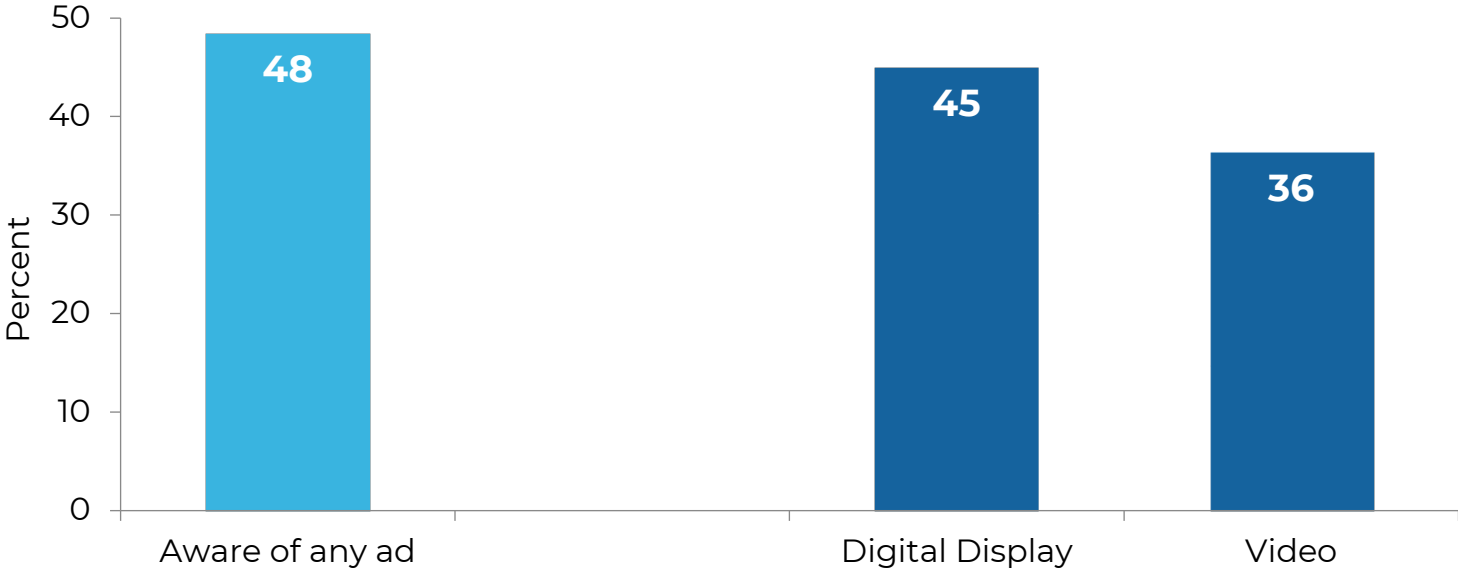
Advertising Awareness

48%

of travelers in Idaho's regional advertising markets were aware of the 2022 Visit Idaho campaigns

2022 Visit Idaho Advertising Awareness – By Media

Base: Residents of Idaho's Advertising Markets

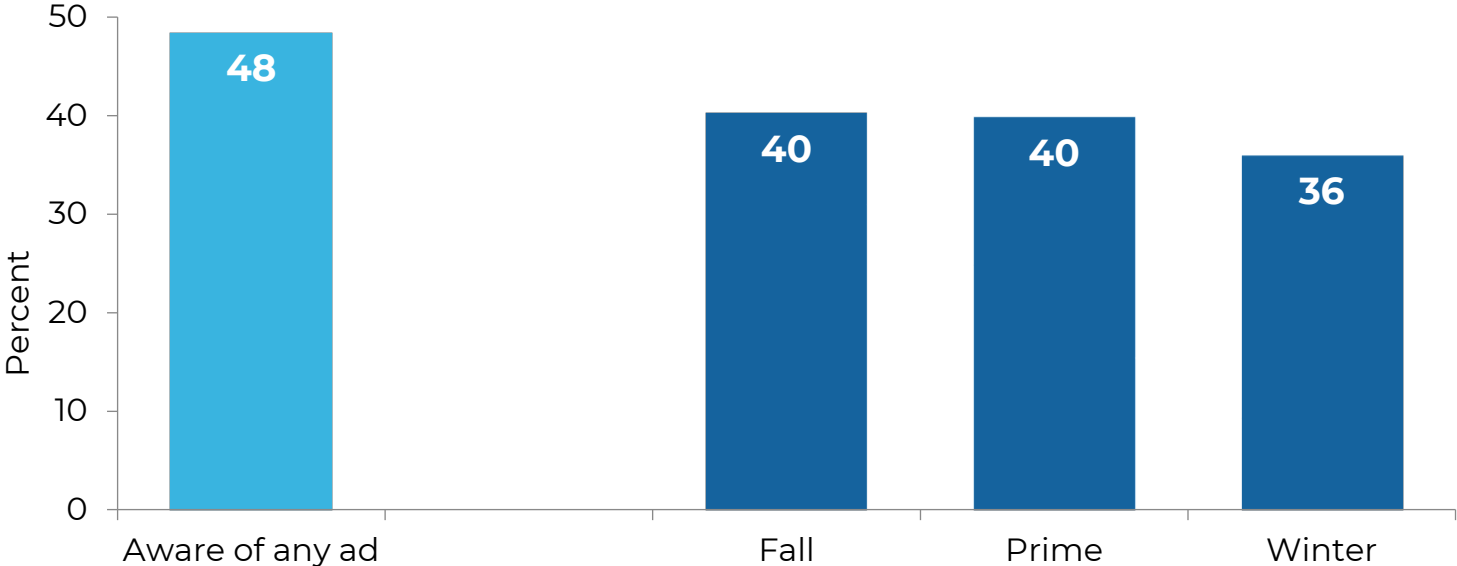


2022 Visit Idaho Image Study
*Saw at least one ad and based on markets where shown



2022 Visit Idaho Advertising Awareness – By Campaign

Base: Residents of Idaho's Advertising Markets



2022 Visit Idaho Image Study
*Saw at least one ad and based on markets where shown



03

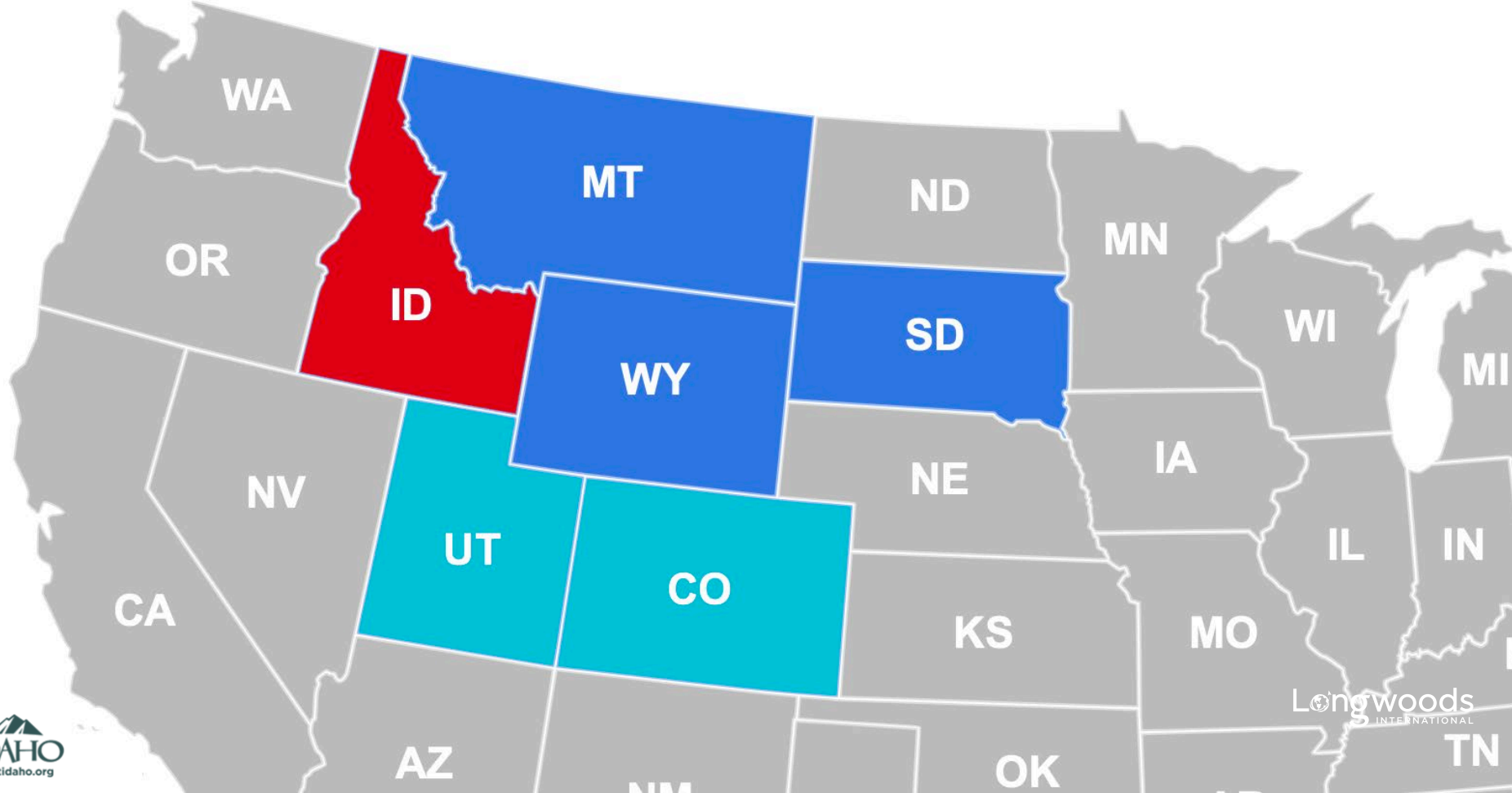
Reputation as a Leisure Travel Destination



Deciding Where to Go



Idaho's Competitive Set



Destination Selection Hot Buttons



Hot Buttons for Destination Selection

Base: Residents of Idaho's Advertising Markets

Hot Buttons

A fun place for a vacation

An exciting place

Lots of things to see and do

Provides a unique vacation experience

A place I would feel welcome

Good for an adult vacation

A vacation there is a real adventure

Popular with vacationers

Interesting towns

A good place for families to visit

Hot Buttons – Idaho

A fun place for a vacation **46%**

Good for an adult vacation **51%**

An exciting place **37%**

A vacation there is a real adventure **48%**

Lots of things to see and do **44%**

Popular with vacationers **37%**

Provides a unique vacation experience **49%**

Interesting towns **47%**

A place I would feel welcome **52%**

A good place for families to visit **52%**

Advertising Impacting Reputation





Advertising Awareness Lift

**Idaho is a place I'd
really enjoy visiting**

Aware of campaign: 55%

Unaware: 37%

**+ 18 point
reputational lift**

Idaho Hot Buttons – Advertising Awareness Lift

A fun place for a vacation

+ 12

Good for an adult vacation

+ 9

An exciting place

+ 19

A vacation there is a real adventure

+ 9

Lots of things to see and do

+ 11

Popular with vacationers

+ 14

Provides a unique vacation experience

+ 9

Interesting towns

+ 11

A place I would feel welcome

+ 8

A good place for families to visit

+ 12

Visitation Impacting Reputation



Idaho Hot Buttons – Visitation Lift

A fun place for a vacation **+ 24**

Good for an adult vacation **+ 28**

An exciting place **+ 24**

A vacation there is a real adventure **+ 20**

Lots of things to see and do **+ 22**

Popular with vacationers **+ 30**

Provides a unique vacation experience **+ 18**

Interesting towns **+ 25**

A place I would feel welcome **+ 26**

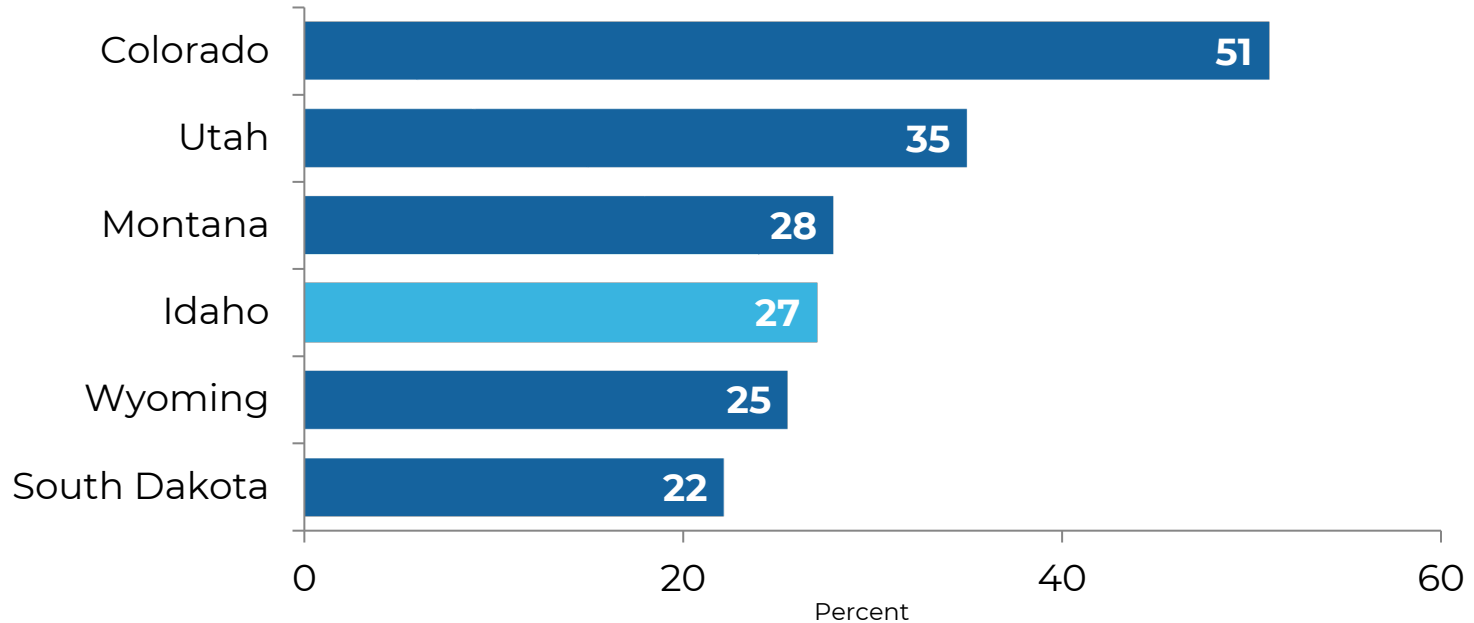
A good place for families to visit **+ 22**

04

Idaho vs. Competitive Set

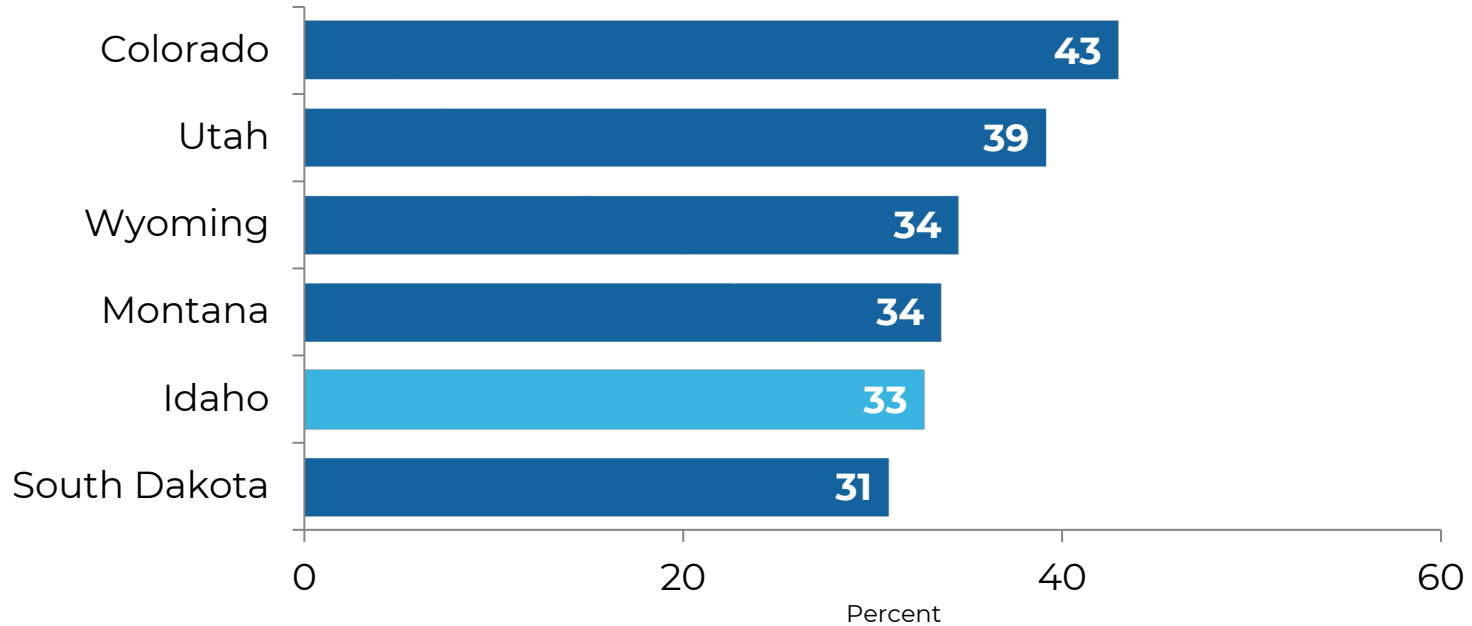
Destinations Ever Visited

Base: Residents of Idaho's Advertising Markets



Destinations Intend to Visit in the Next 12 Months

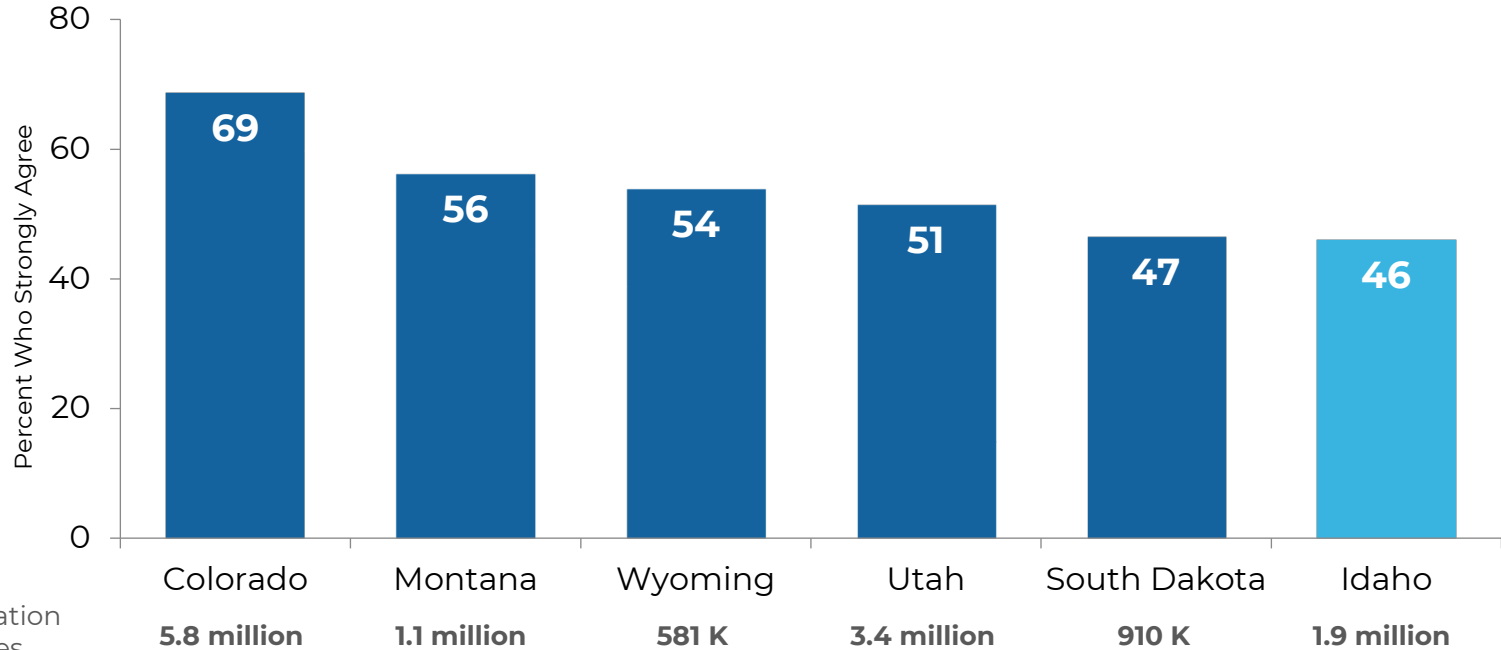
Base: Residents of Idaho's Advertising Markets



Idaho's Focused Competitive Set

“A Place I’d Really Enjoy Visiting”

Base: Residents of Idaho's Advertising Markets



2022 Population
Estimates



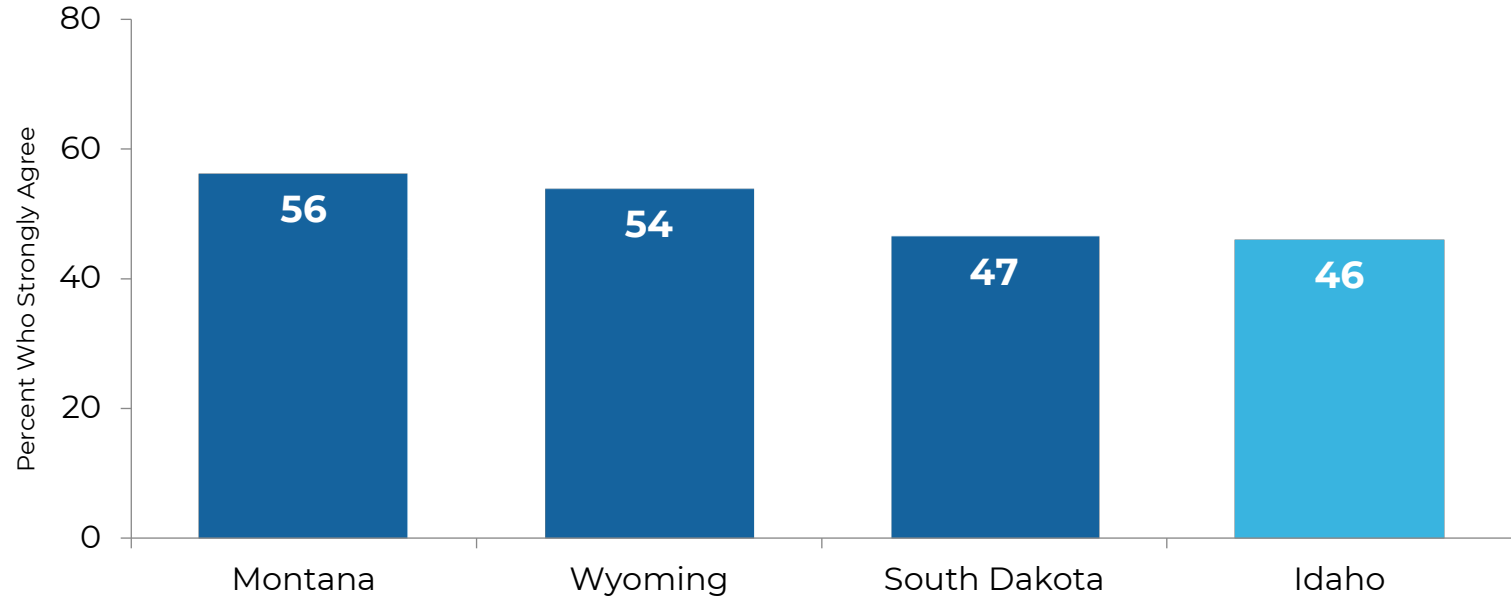
2022 Visit Idaho Image Study



Idaho's Overall Image vs. Competition

“A Place I'd Really Enjoy Visiting”

Base: Residents of Idaho's Advertising Markets



Idaho Hot Buttons – vs. Focused Competitive Set

A fun place for a vacation	- 6	Good for an adult vacation	- 5
An exciting place	- 8	A vacation there is a real adventure	- 10
Lots of things to see and do	- 6	Popular with vacationers	- 10
Provides a unique vacation experience	- 9	Interesting towns	- 5
A place I would feel welcome	TIE	A good place for families to visit	TIE

05

Halo Effect



Travel = Resident Recruitment

67%

appreciate travel more now,
after experiencing the COVID-19
pandemic travel
limitations/restrictions

Strongly agree: 29%

2023 Longwoods Traveler Sentiment Study, fielded April 26, 2023



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2023 Longwoods Traveler Sentiment Study, fielded March 29, 2023

Travel = Resident Recruitment

78%

Believe it's important to visit a location on a leisure trip before moving there

Very important: 53%



Longwoods INTERNATIONAL

Travel = Resident Recruitment

68%

of American travelers who
moved during the past 3 years
previously visited that
destination on a leisure trip

Within a year of moving: 41%

2023 Longwoods Traveler Sentiment Study, fielded July 19, 2023



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Travel Advertising = Resident Recruitment

32%

Leisure travel advertisements
have influenced desire to move
to the place/places
being promoted

Very influential: 15%

Halo Effect of Tourism Advertising

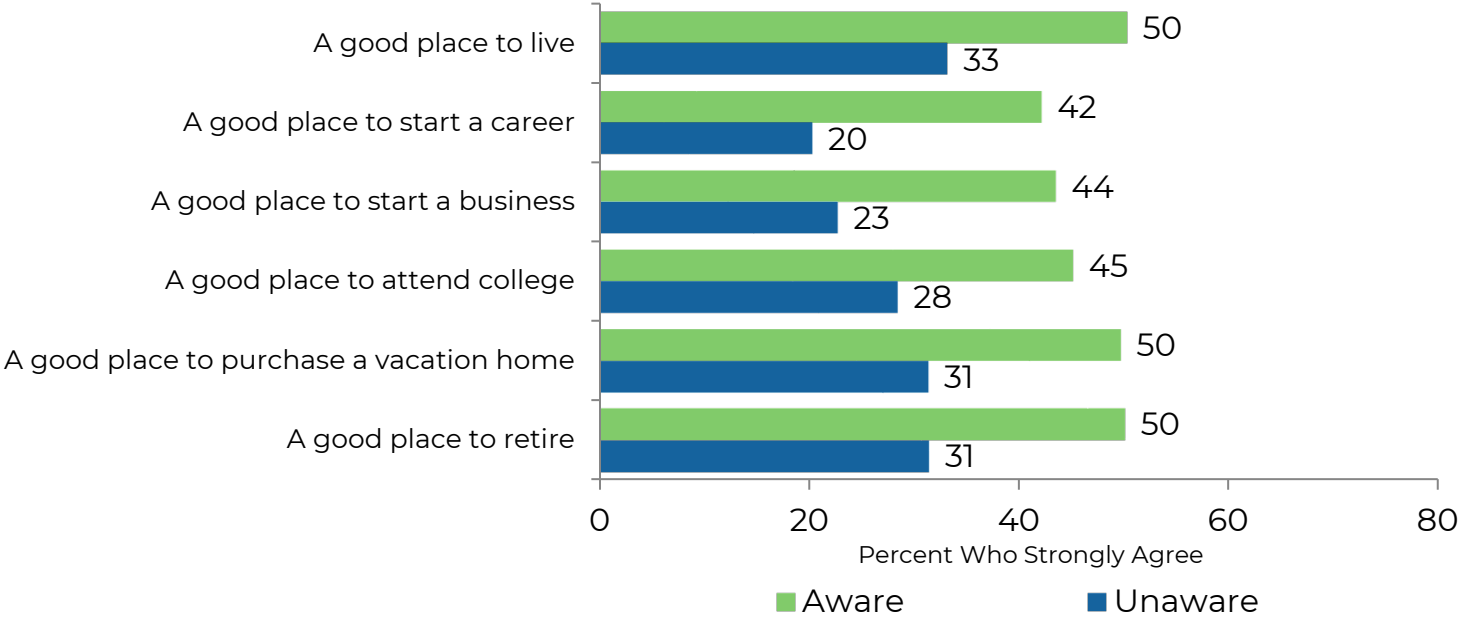
PASSION LED US HERE



Longwoods
INTERNATIONAL

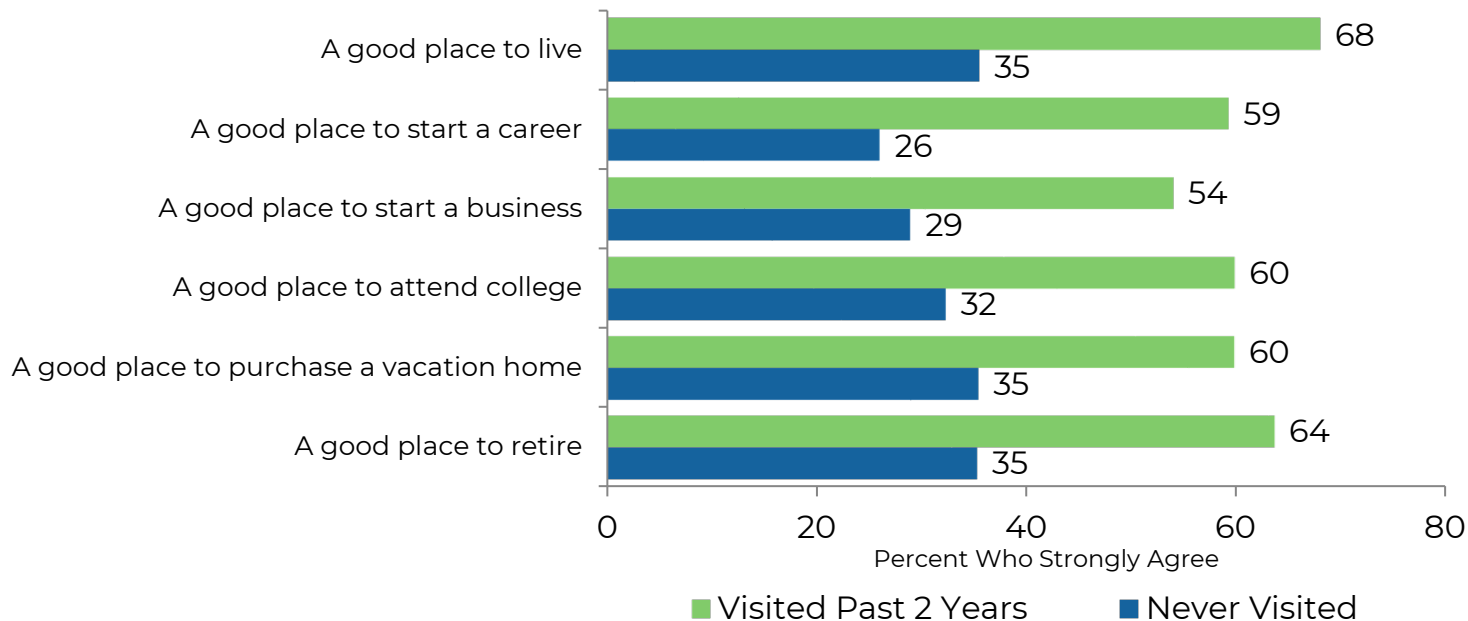
Impact of Tourism Ad Awareness on Idaho's Economic Development Image

Out-of-State Residents of Idaho's Advertising Markets



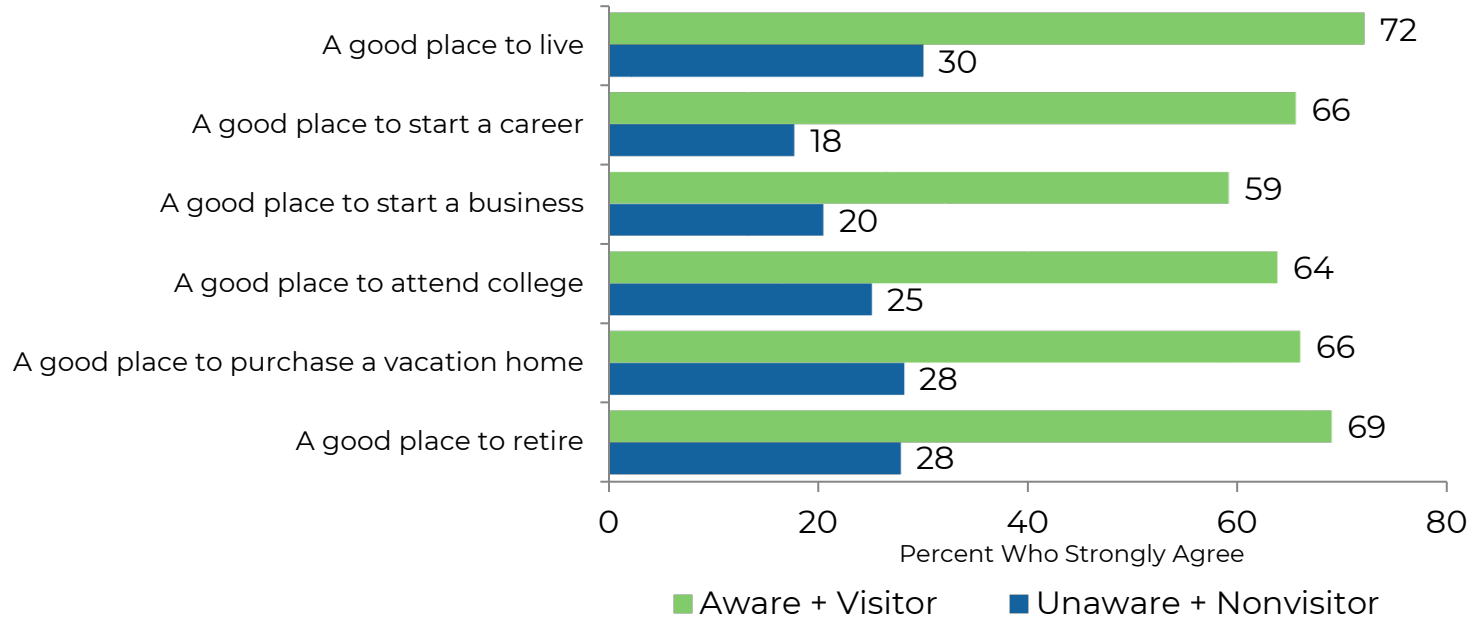
Impact of Visitation on Idaho's Economic Development Image

Out-of-State Residents of Idaho's Advertising Markets



Impact of Ad Awareness Plus Visitation on Idaho's Economic Development Image

Out-of-State Residents of Idaho's Advertising Markets





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06

**Idaho Resident Sentiment
Study Launch**

Longwoods & Destinations International Partnership



2023 Idaho Resident Sentiment Study

This study covers:

- Perceived importance of tourism at state/local level
- Perceptions of benefits/disadvantages of tourism: overall and detailed aspects; economic impacts; quality of life
- Perceptions of tourism employment
- Perceptions of short-term rentals and their impact
- Personal involvement with inbound tourism
- Attitudes on sustainability of tourism/ecological impacts
- Attitudes towards hosting events
- Attitudes towards welcoming tourists in Idaho
- Attitudes towards DMO funding of tourism development/marketing

“Idaho Is a Place I Would Feel Welcome”

52%

of travelers in Idaho’s primary advertising markets strongly agree

+ 8 pts

Advertising awareness lift

+26 pts

Recent visitation lift

TIE

vs. competitive set of Montana, Wyoming & South Dakota

Idaho's Regions



Idaho Regions - YOY Change 2019 to 2021

North Central	32.8%
Central	17.4%
Eastern	16.2%
South Central	14.6%
Southeastern	- 1.1%
Northern	- 1.7%
Southwestern	- 6.4%

Promote the Resident Sentiment Study In Your Community!





Idaho Resident Sentiment Study QR Code

visitidaho.org/survey



Key Takeaways

Just 1% More

Small shifts towards business and marketable leisure trips, as well as an increased share of air visitors, can lead to a significant increase in tourism expenditures – just 1% will make a difference! Focus on sustaining positive, incremental change.

Awareness = Reputational Lift

The evidence is clear – travelers who see Visit Idaho's campaign have a more positive perception of the state as a place to visit on a leisure trip.

Halo Effect

Recent visitors aware of the Visit Idaho's campaign rated the city higher across all wider economic development attributes measuring Idaho as a place to live, work, and learn.

Resident Sentiment

The Visit Idaho Resident Sentiment study goes live is live ad of Monday! Reach out to your residents and encourage them to participate – we want their voices to help shape the future of tourism in the state!



Thank You!

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