

CHATTA NOOGA

In a state of joy



Chattanooga 2017
Visitor Research



Longwoods Methodology



Largest ongoing
research study of
business and leisure
American travelers



Longwoods
Travel USA®

Quarterly household
survey of travel behavior
within the USA



2017

- National survey of 329,470 trips
- 789 Chattanooga Trips
- 95% Confidence Level

Research Findings

2017 Chattanooga Area Visitor Economy

 \$1.2B Visitor Spending (\$1.1B in Hamilton Co.)

 5% Growth in Visitor Spending

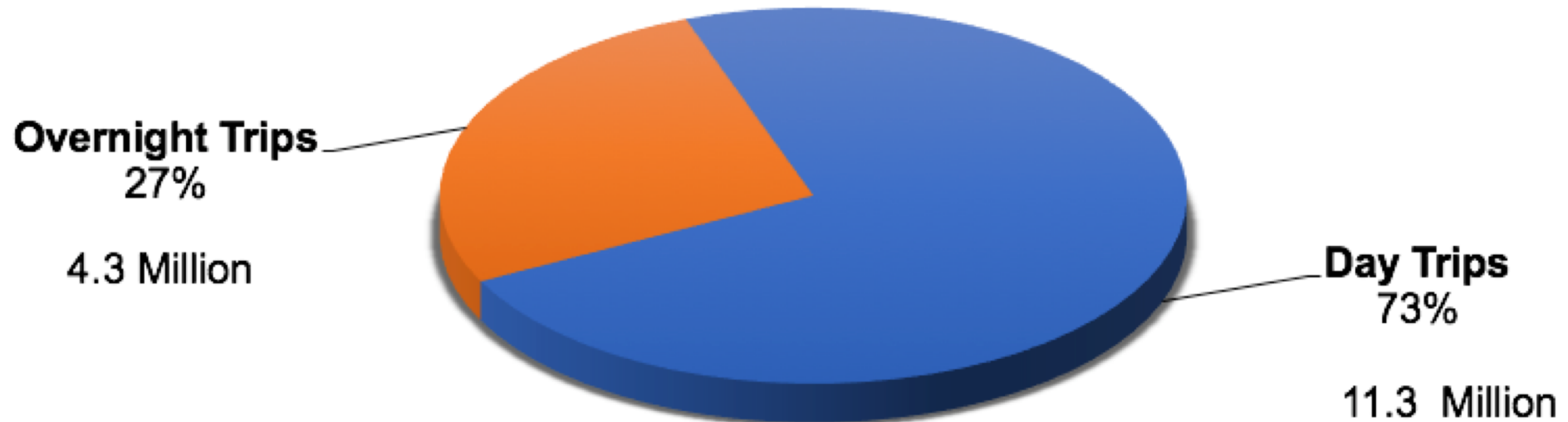
 15.6 Million Visitors

 2.3% Growth in Visitors

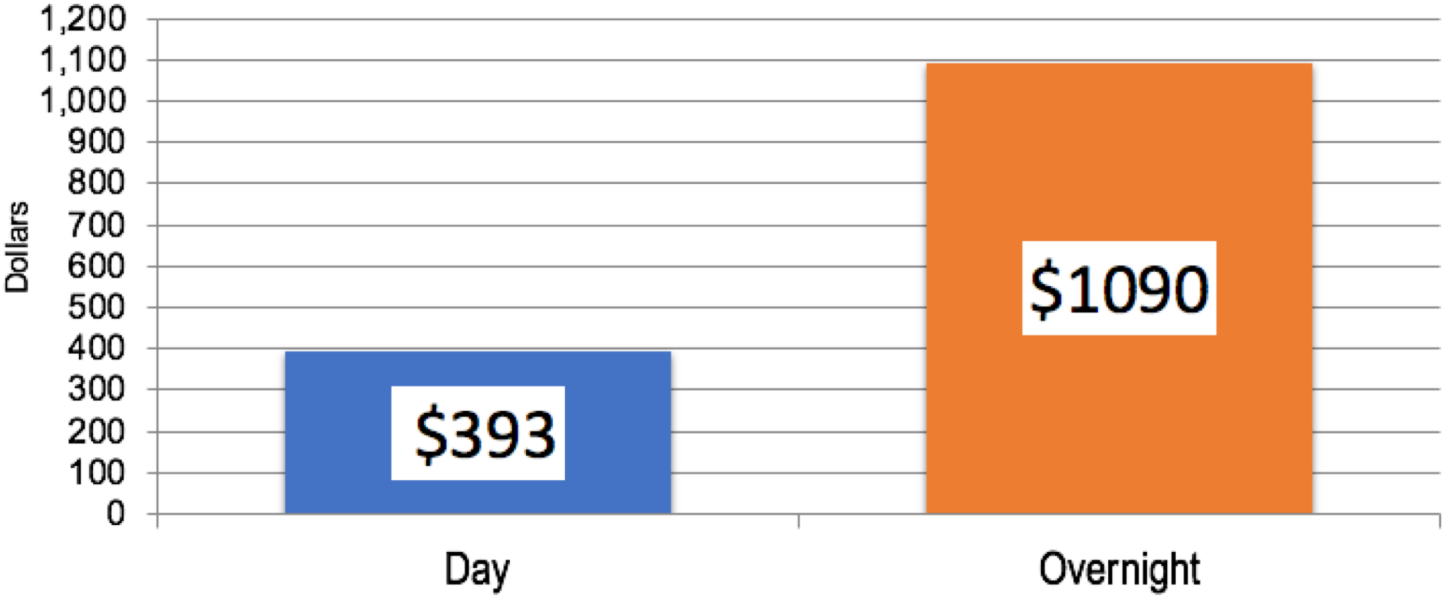
Total Size of Chattanooga 2017 Domestic Travel Market

Total Person-Trips = 15.6 Million

+2.3% vs. 2016



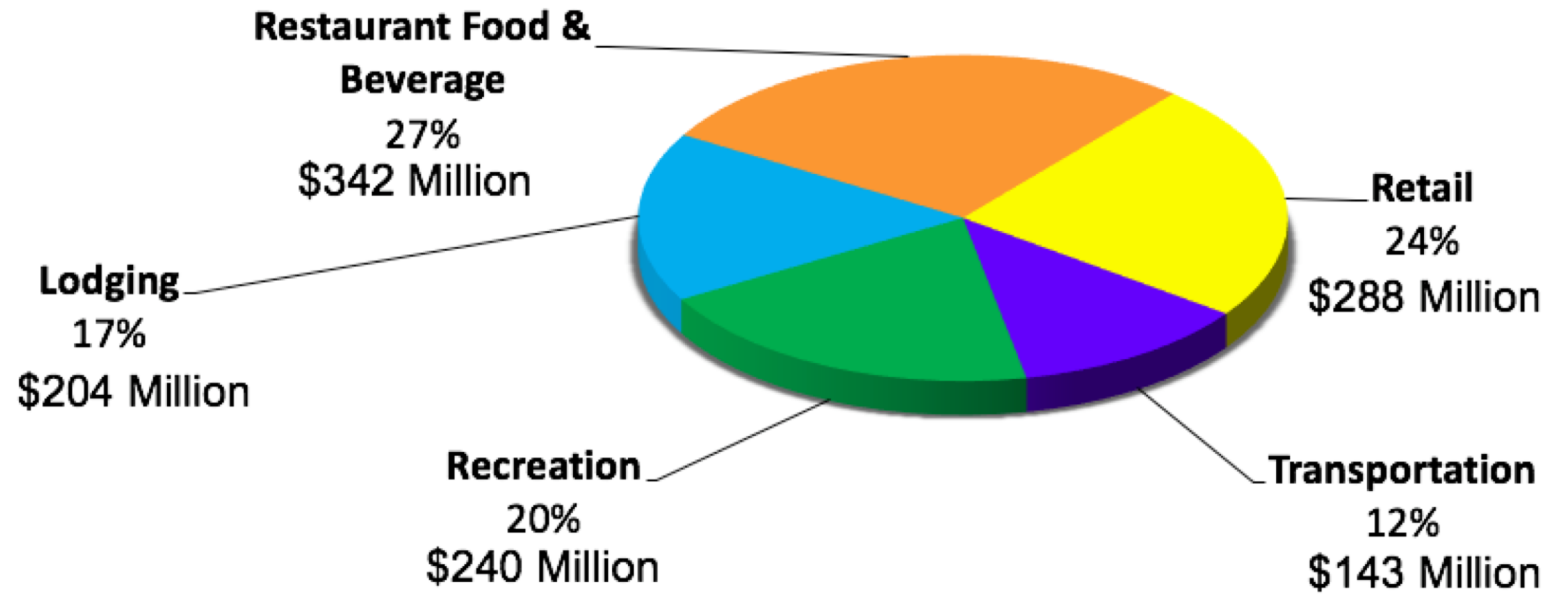
Average Visitor Spending Day v. Overnight



2017 Total Chattanooga Visitor Spending

Total Spending = \$1.2 Billion

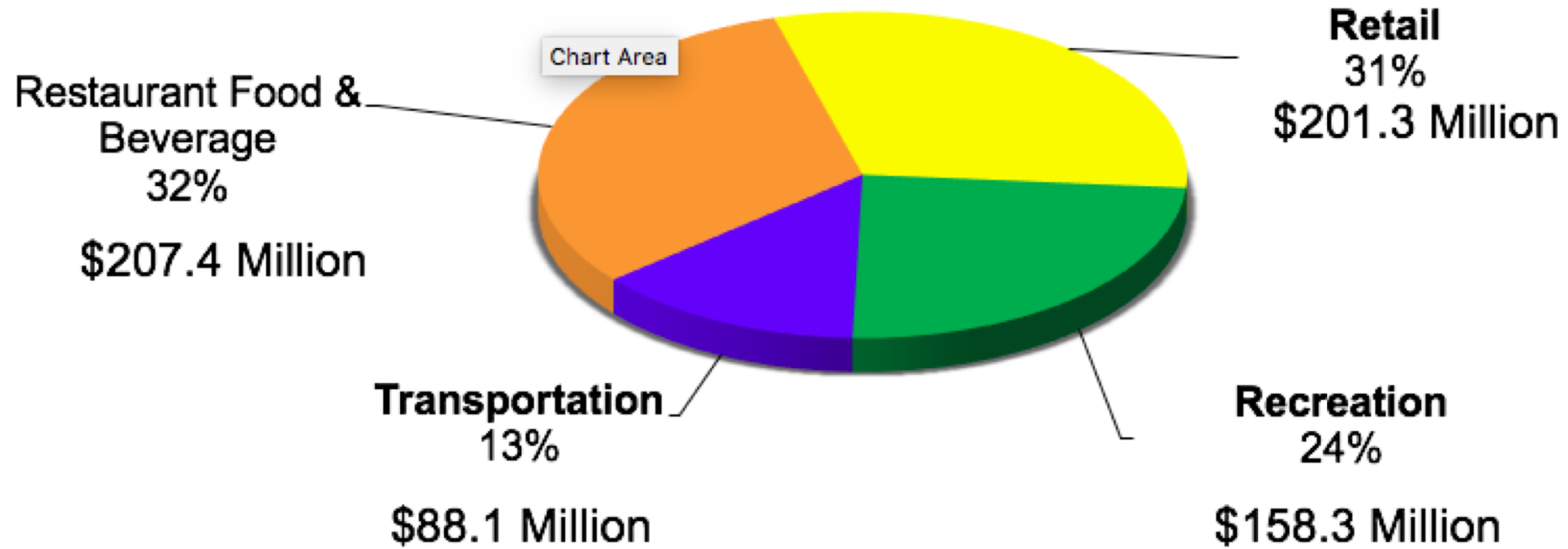
+5% vs. 2016



2017 Day Trip Spending

Total Spending = \$655.1 Million

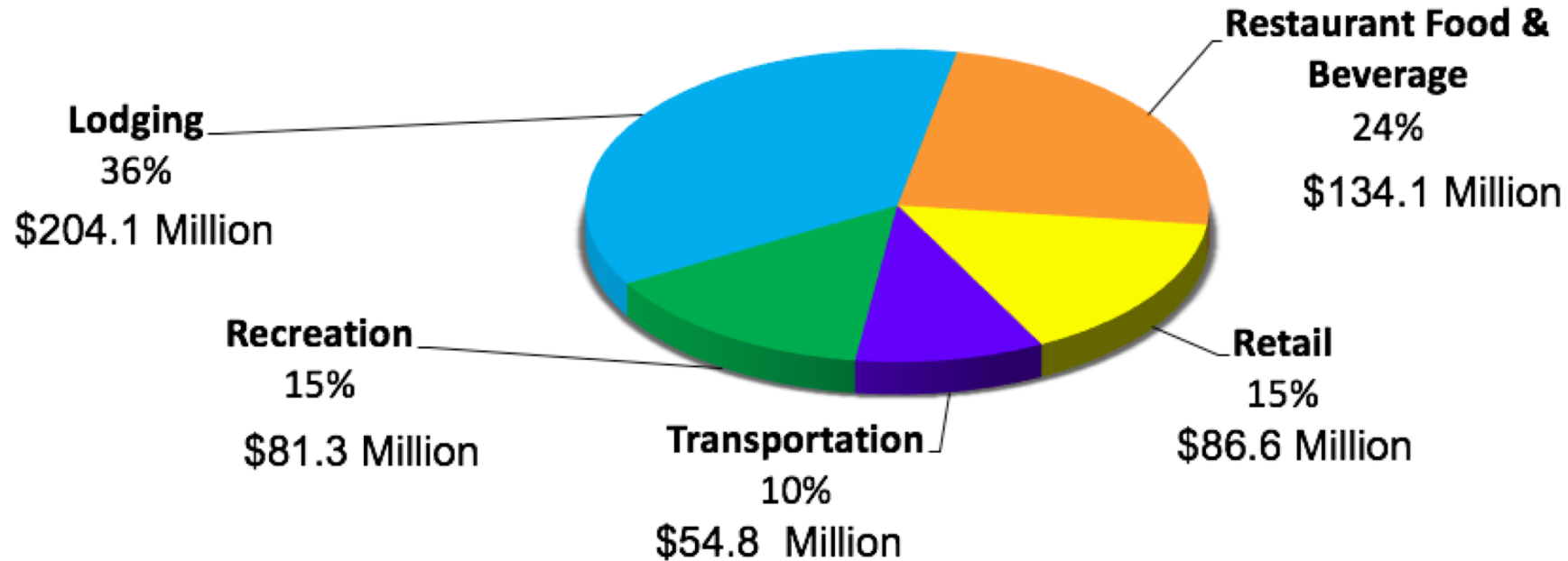
+4.4% vs. 2016



2017 Overnight Spending

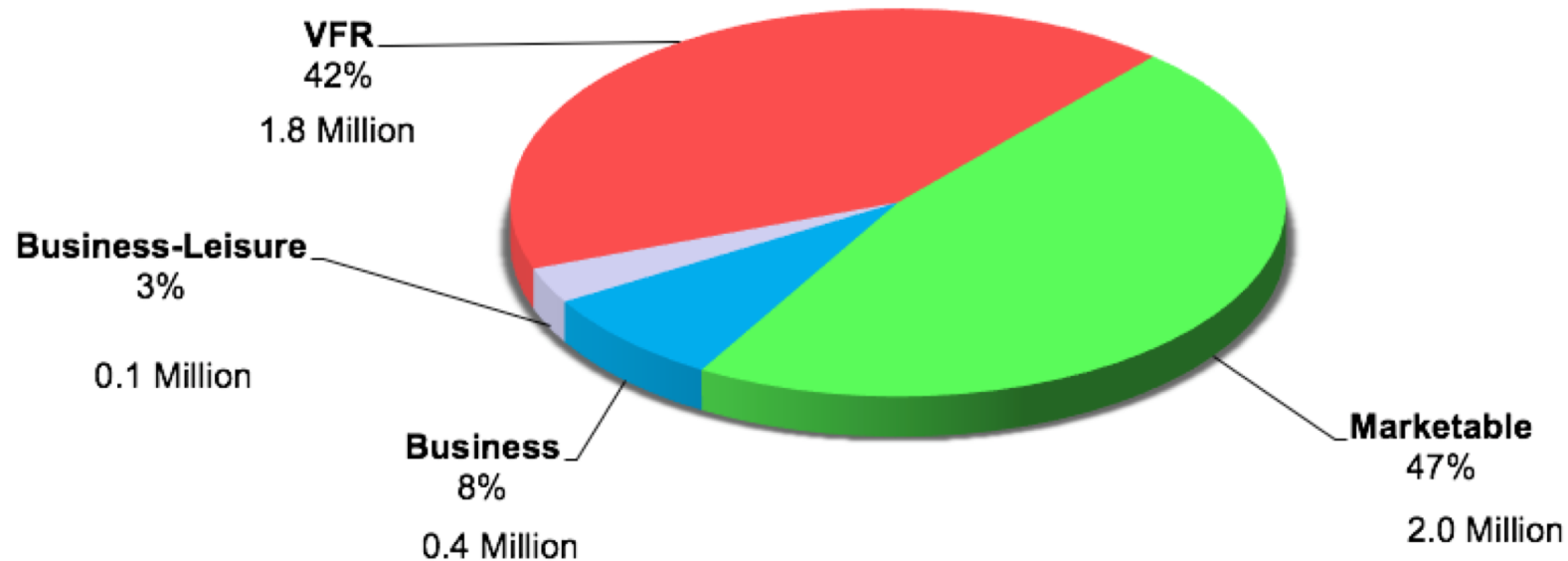
Total Spending = \$560.9 Million

+5.7% vs. 2016



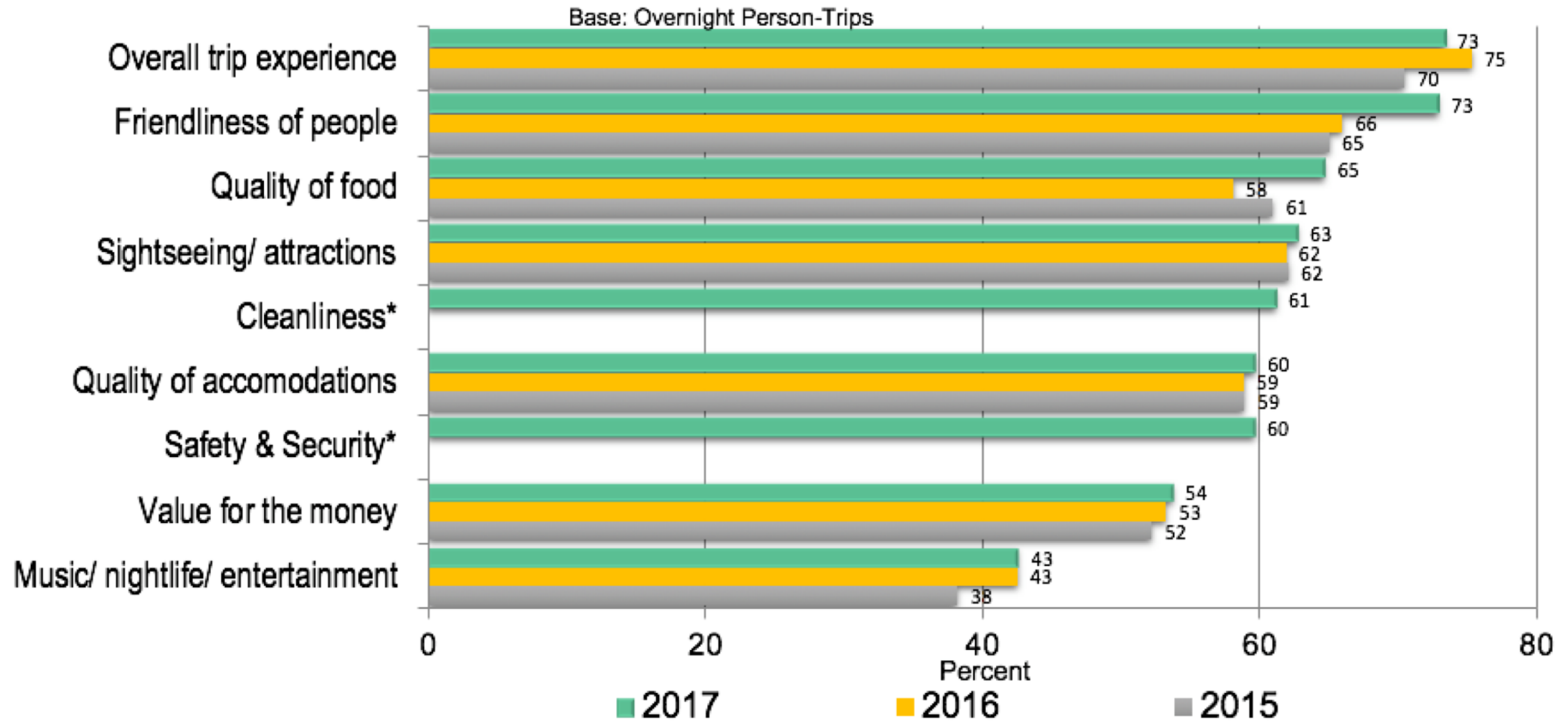
Overnight Travel Market Purpose of Travel

Total Overnight Person-Trips = 4.3 Million



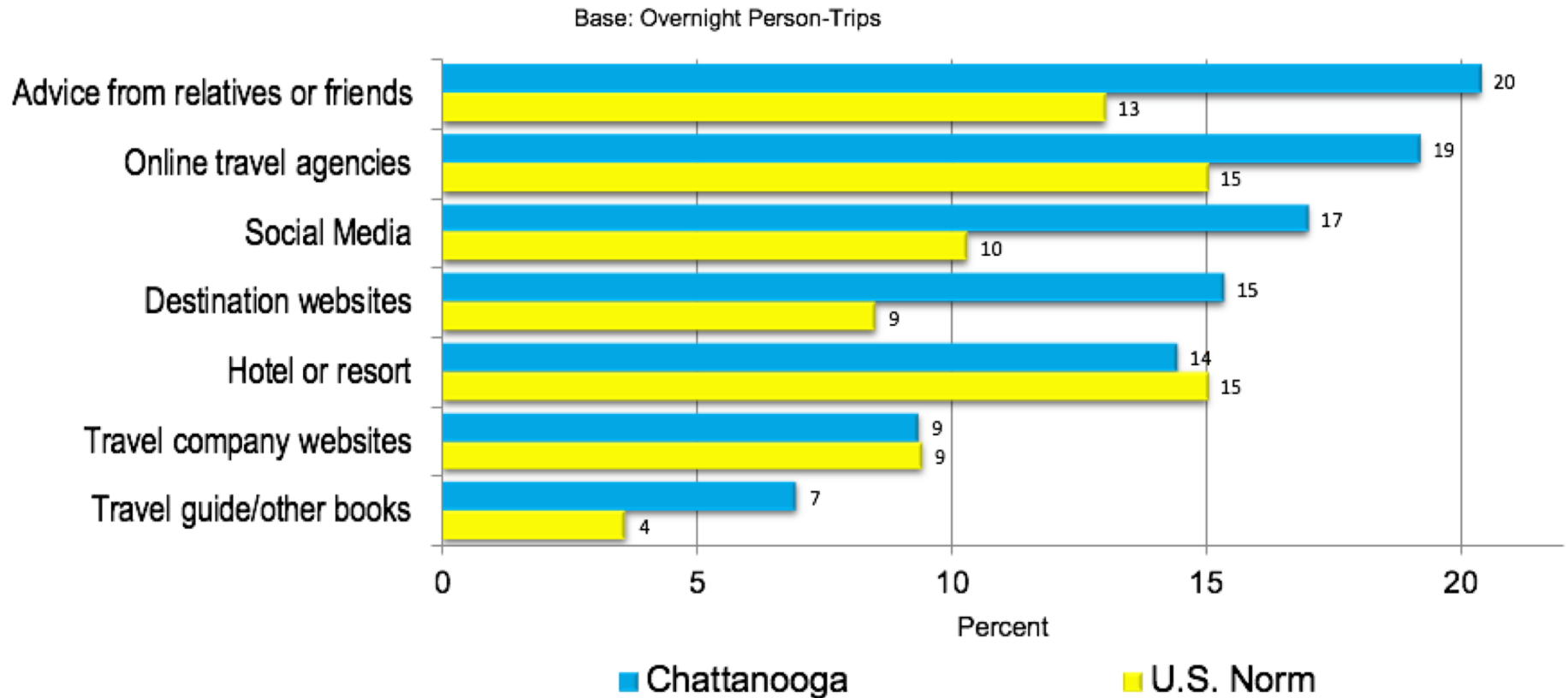
¹³ VFR (Visiting Friends and Relatives) + Marketable = Leisure Travel

% Very Satisfied with Trip 2017 vs. 2016 vs. 2015

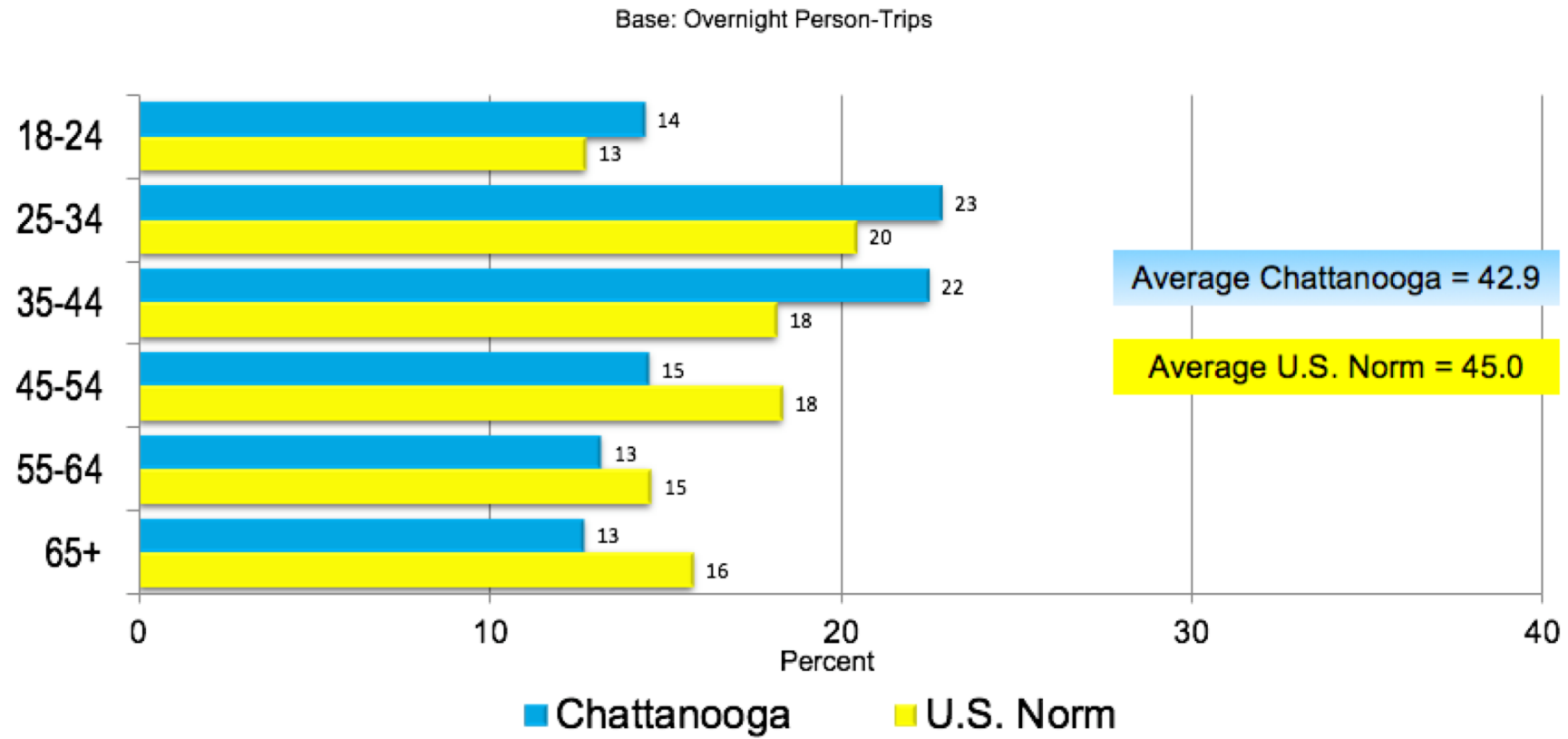


* Added in 2017

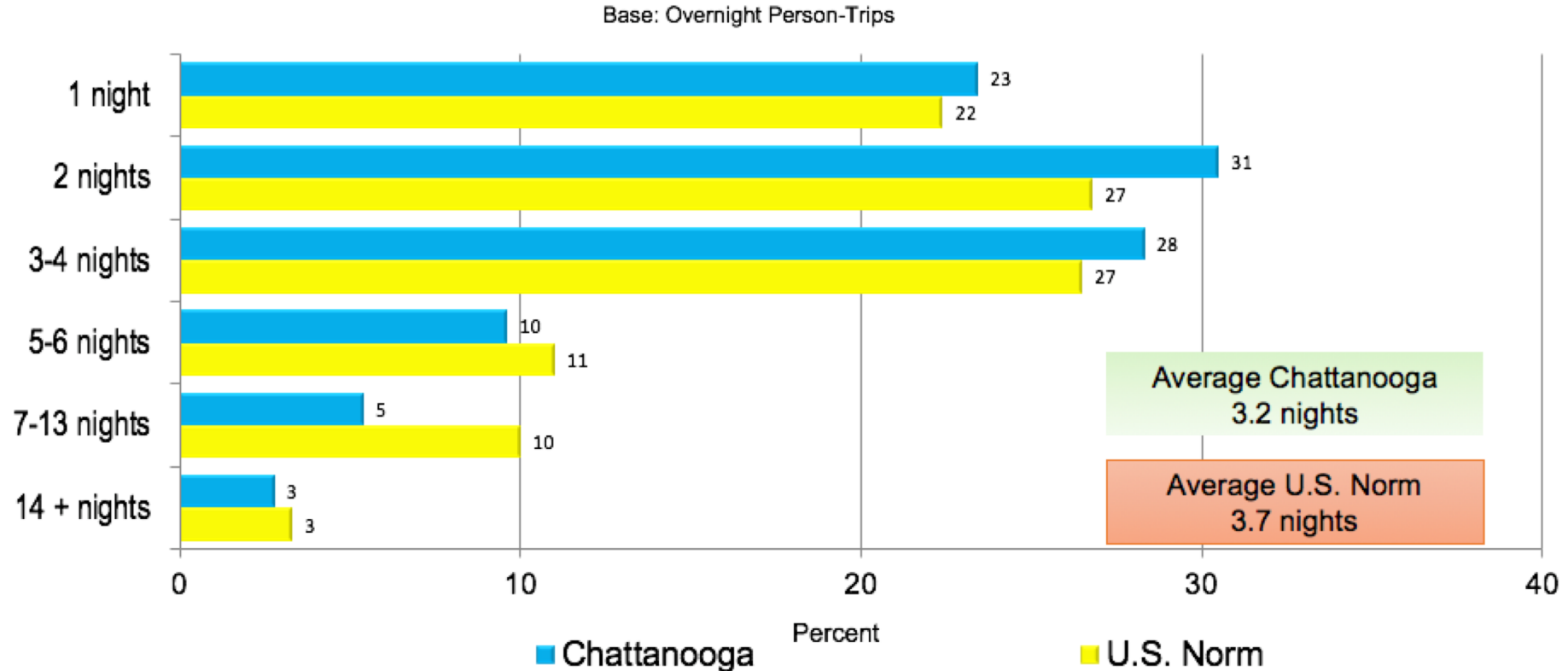
Trip Planning Information Sources



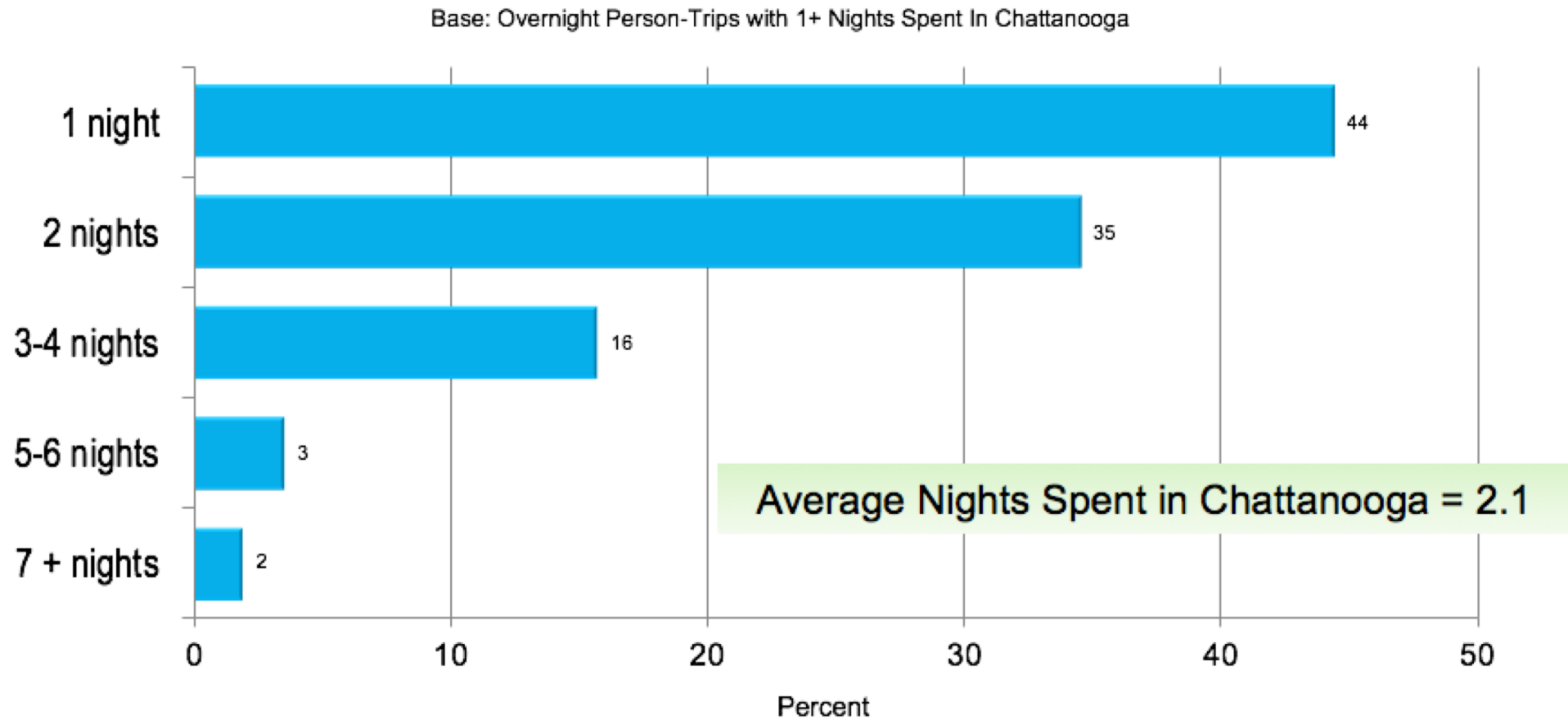
Age



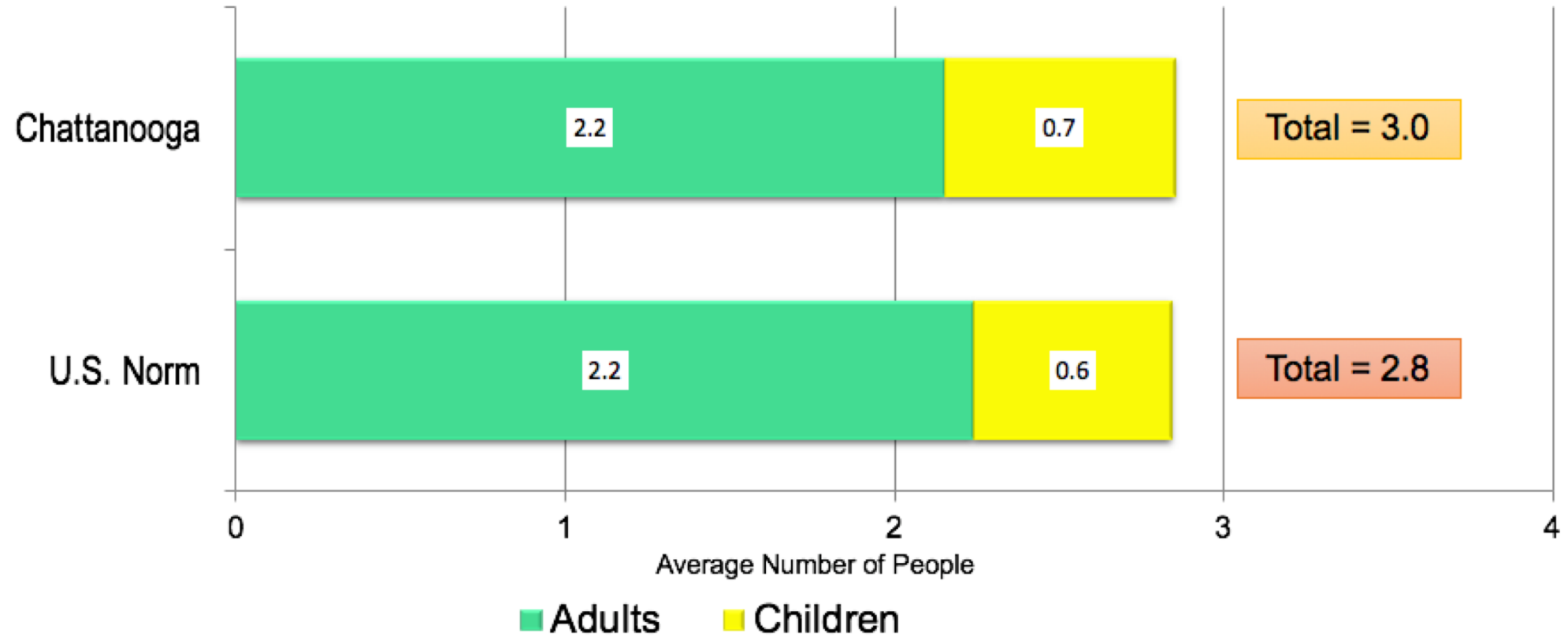
Total Nights Away on Trip



Number of Nights Spent in Chattanooga

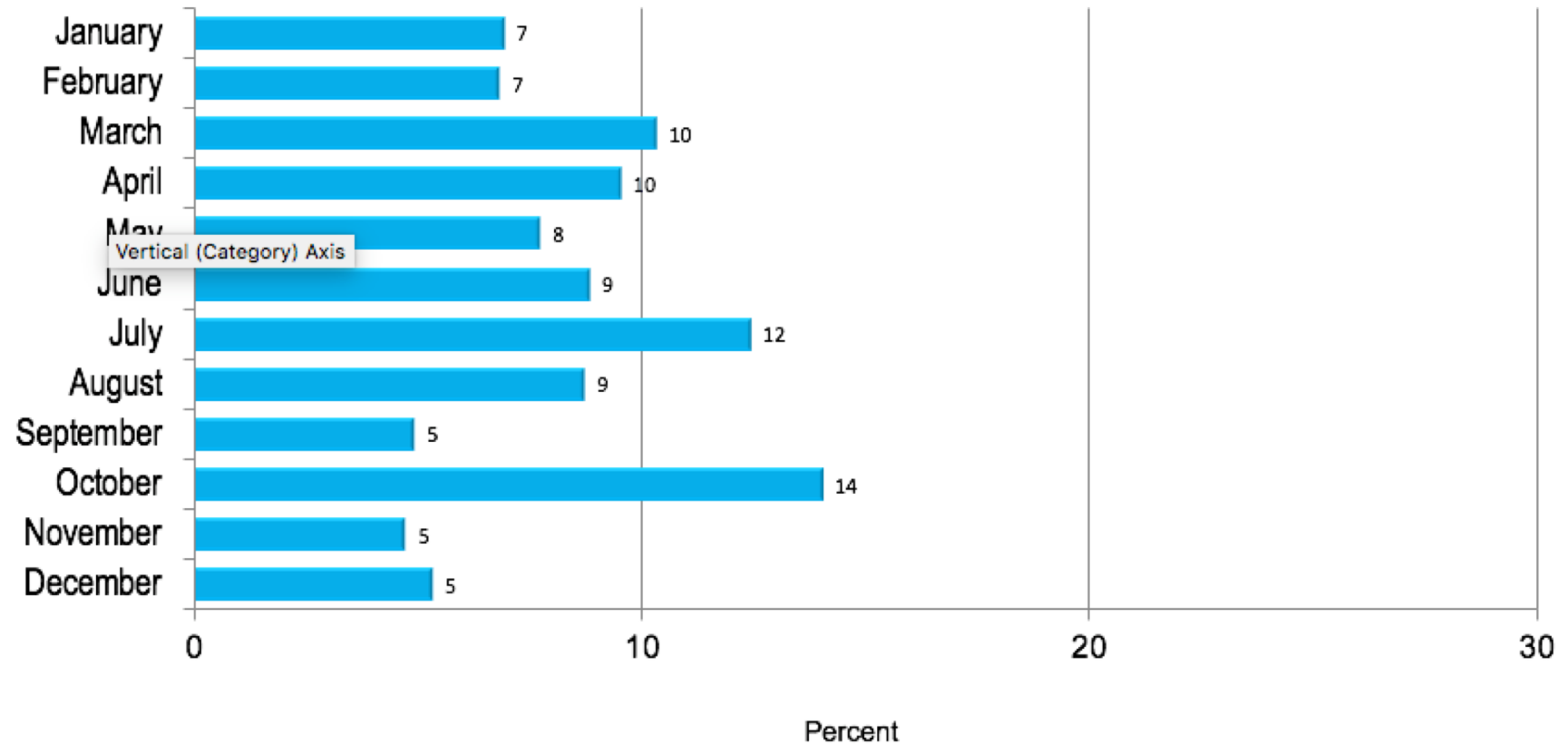


Size of Travel Party

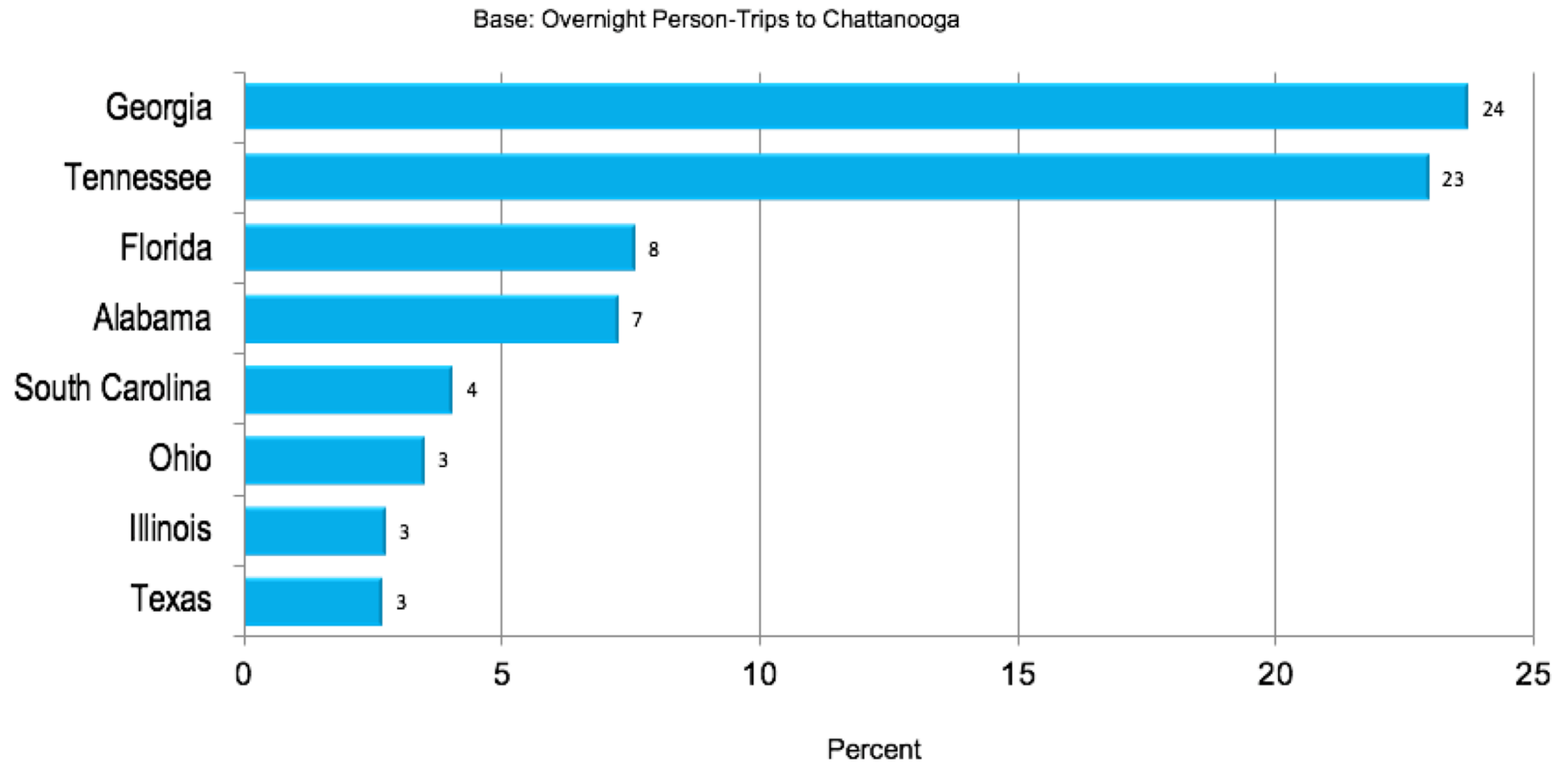


2017 Month of Trip

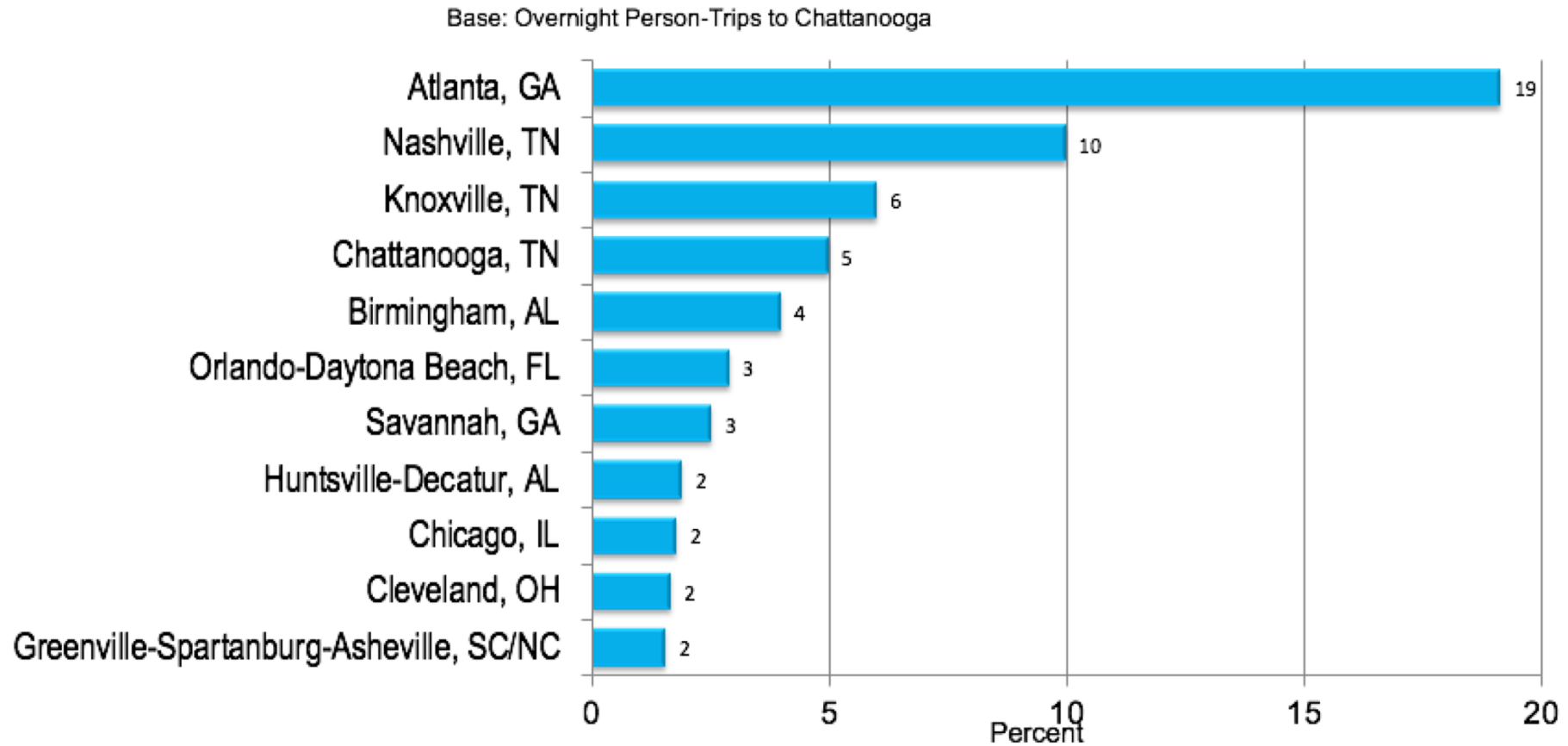
Base: Overnight Person-Trips to Chattanooga



2017 State Origin Of Overnight Trip



2017 DMA Origin Of Overnight Trip



10 Key Findings

VISITOR ECONOMY

- Chattanooga's Visitor Economy is outpacing the US Average growth for both visitor spending and number of visitors

DAY TRIPPERS

- Day trippers account for 11.3M out of 15.6M annual visitors, playing an important role in our visitor economy and providing a tremendous opportunity to be converted to overnight visitors

OVERNIGHT VS. DAY SPENDING

- Overnight visitors spend \$1,090 per party per overnight trip versus \$393 per party per day trip.
- However, day trippers account for the largest portion of the visitor economy: \$655m day vs. \$560m overnight

LEISURE TRAVEL

- Leisure plays a major role in 92% of trips to Chattanooga making it the backbone of our visitor economy

BUSINESS TRAVEL

- Business travelers provide an opportunity to collaborate with local businesses and economic development partners to increase this segment

LOCALS ROLE IN TOURISM

- The second largest leisure segment is Visiting Friends and Relatives (VFR); and locals are the #1 visitor information source. Local engagement is essential to the success of our visitor economy.

VISITOR SATISFACTION

- Overall satisfaction with Chattanooga is strong and stable with a rise in satisfaction with music, food, and our residents. Highlighting our culture, music and food creates an opportunity to capitalize on this momentum

WINTER SLOWDOWN

- Winter months are slower, leaving a gap and opportunity for both leisure and group travel

VISITOR PROFILE

- Average length of stay in Chattanooga is 2.1 nights; visitors skew slightly younger and are more likely to travel with children than the national average

FLORIDA MARKET

- Florida ranks third as state of origin for overnight visitors which may be an opportunity for future market expansion

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