



Hamilton County Tourism, Inc.

2015 – 2016 Visitor Profile Study



Background and Objectives

Hamilton County Tourism Inc., (HCT) partnered with Strategic Marketing and Research Insights in March 2015 to design and implement a visitor profile study.

HCT wished to better understand visitors in terms of:

- Primary purpose of trip
- Length of trip
- Lodging
- Travel party
- Trip planning
- Activities and attractions visited
- Trip satisfaction
- Trip expenditures
- Demographic profile



visit
hamilton
county
indiana

Like the getaway you've been waiting for, only closer.
[Learn more at VisitHamiltonCounty.com](http://VisitHamiltonCounty.com)

ARTS * HISTORY * SHOPPING * DINING * BIKING * HIKING



HISTORIC COURTHOUSE SQUARE, NOBLESVILLE
JUST NORTH OF INDY

Methodology

- Visitor data was captured in two phases:
 1. An initial intercept survey
 2. A more in-depth follow-up survey
- HCT hired interviewers to conduct the intercepts via iPads at various Hamilton County locations.
- In total, just over 1,222 intercept surveys and 385 follow-up surveys were completed between April 2015 and March 2016.
- The top table shows the number of completed intercept and follow-up surveys by intercept location.
- The bottom table shows the number of completed intercept and follow-up surveys by respondent residence – separated into local and non-local.

| Intercept Location | Completed Intercepts | Completed Follow-ups |
|-------------------------|----------------------|----------------------|
| Klipsch | 100 | 26 |
| Downtown Carmel | 115 | 32 |
| Downtown Noblesville | 47 | 14 |
| Grand Park | 379 | 129 |
| Hotels | 257 | 75 |
| Conner Prairie | 73 | 30 |
| Symphony on the Prairie | 78 | 26 |
| Downtown Fishers | 71 | 23 |
| Sports Event (Non GP) | 40 | 11 |
| Other | 62 | 19 |
| Total | 1222 | 385 |

| Respondent Residence | Completed Intercepts | Completed Follow-ups |
|---------------------------|----------------------|----------------------|
| Hamilton County, IN | 369 | 111 |
| Indianapolis DMA - Non HC | 293 | 104 |
| Total Local | 662 | 215 |
| Non-Local | 560 | 170 |
| Total | 1222 | 385 |



Intercept Locations by Visitor Groups

- The location of the intercept will influence the visitor profile. For instance, an intercept conducted at Grand Park is likely to result in a visitor in town for an amateur sporting event with their kids.
- Thus, the intercept schedule will inevitably skew the research results if we don't know how visits actually distribute between the intercept locations.
- To control for these skews, we created various groups to review the results by, rather than looking strictly at overall visitors.

| | Local | |
|------------------|------------|------------|
| Visitor Category | Intercepts | Follow-ups |
| Sports | 165 | 56 |
| - Grand Park | 114 | 42 |
| Business | 25 | 6 |
| Leisure | 472 | 153 |
| Total | 662 | 215 |

| | Non-Local | |
|------------------|------------|------------|
| Visitor Category | Intercepts | Follow-ups |
| Sports | 295 | 94 |
| - Grand Park | 265 | 87 |
| Business | 159 | 43 |
| Leisure | 106 | 33 |
| Total | 560 | 170 |



Primary Purpose of Visit, by Intercept Location

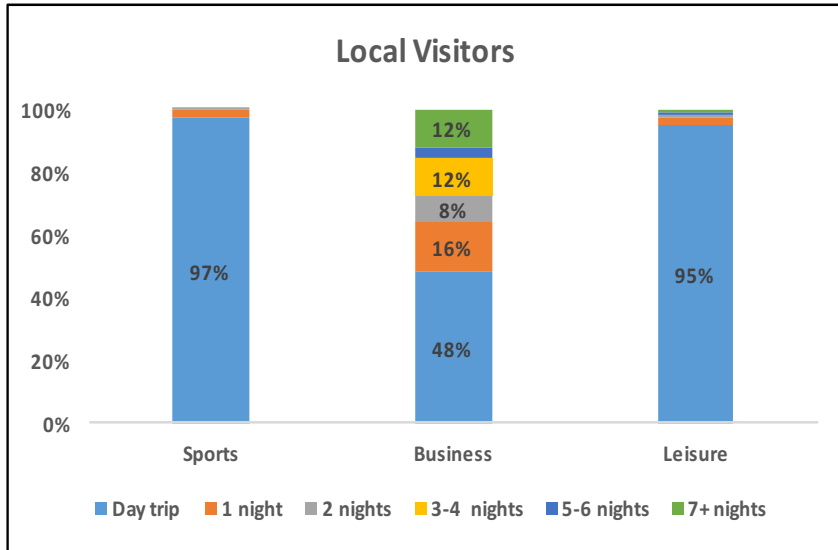
| Local Visitors | | | | |
|----------------------------|------------|--------|-----------|--------|
| Primary Purpose of Visit | Grand Park | Events | Downtowns | Hotels |
| Concert | 0% | 41% | 39% | 2% |
| Festival/Cultural Event | 0% | 23% | 31% | 2% |
| Amateur Sports | 100% | 14% | 4% | 2% |
| Professional Sports | 0% | 0% | 0% | 0% |
| Leisure | 0% | 15% | 14% | 19% |
| Wedding/Social Event | 0% | 0% | 1% | 2% |
| Visiting Friends/Relatives | 0% | 0% | 0% | 7% |
| Business | 0% | 1% | 1% | 47% |
| Passing through | 0% | 0% | 0% | 5% |
| Other | 0% | 6% | 9% | 14% |

| Non-Local Visitors | | | | |
|----------------------------|------------|--------|-----------|--------|
| Primary Purpose of Visit | Grand Park | Events | Downtowns | Hotels |
| Concert | 0% | 56% | 27% | 0% |
| Festival/Cultural Event | 0% | 11% | 19% | 0% |
| Amateur Sports | 100% | 15% | 27% | 7% |
| Professional Sports | 0% | 0% | 0% | 1% |
| Leisure | 0% | 5% | 8% | 5% |
| Wedding/Social Event | 0% | 0% | 0% | 0% |
| Visiting Friends/Relatives | 0% | 13% | 12% | 3% |
| Business | 0% | 0% | 0% | 74% |
| Passing through | 0% | 0% | 0% | 1% |
| Other | 0% | 0% | 8% | 9% |

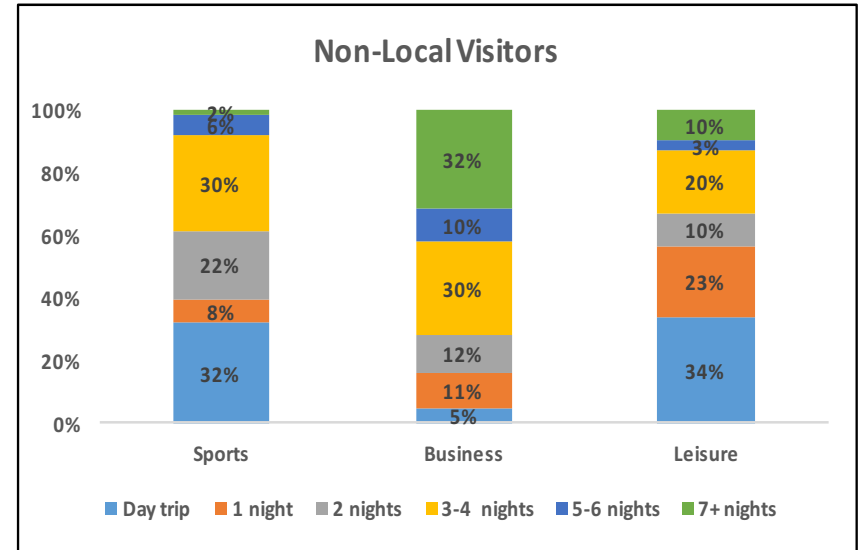
- Visitors surveyed at Grand Park were in Hamilton County strictly for an amateur sports event.
- Event and Downtown visitors are most likely attending concerts, festivals or general leisure visitors. Non-local visitors also may be in Hamilton County visiting friends and relatives.
- Hotel intercepts represent mostly business travel, whether it be sales trips, training or conferences. Local visitors also stay overnight in Hamilton County for general leisure activities.



Trip Length by Visitor Type



*Sports and Business should be considered directional due to small sample size.

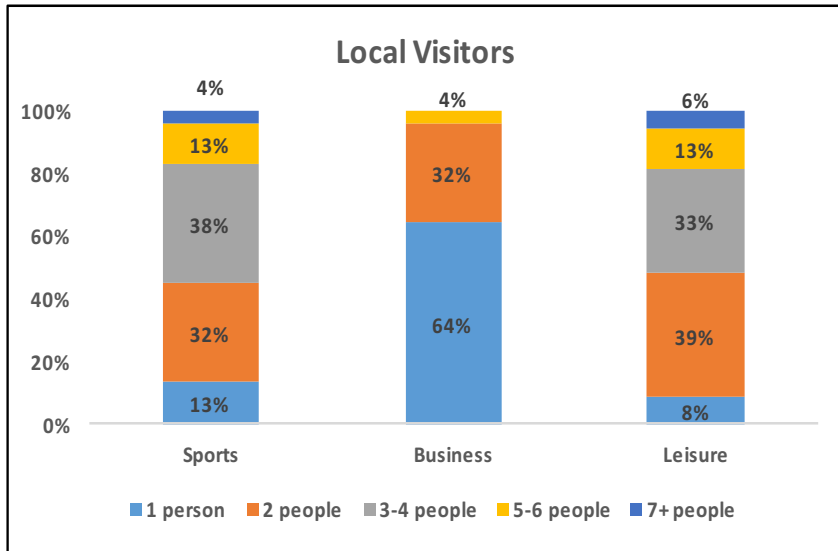


*Business and Leisure should be considered directional due to small sample size. Extended Stays (>14 days) removed.

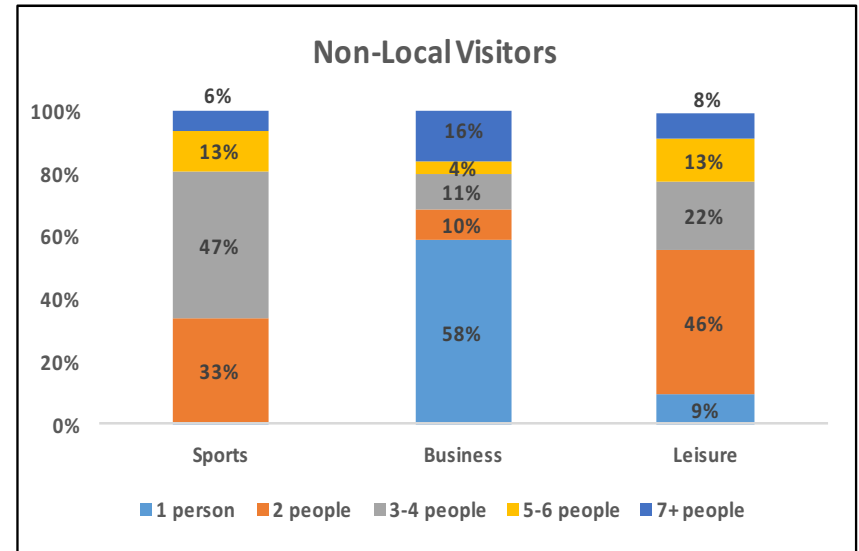
- Visitors surveyed at Grand Park were in Hamilton County strictly for a amateur sports event.
- Event and Downtown visitors are most likely attending concerts, festivals or general leisure visitors. Non-local visitors also may be in Hamilton County visiting friends and relatives.
- Hotel intercepts represent mostly business travel, whether it be sales trips, training or conferences. Local visitors also stay overnight in Hamilton County for general leisure activities.



Travel Party Size, by Visitor Type



*Sports and Business should be considered directional due to small sample size.

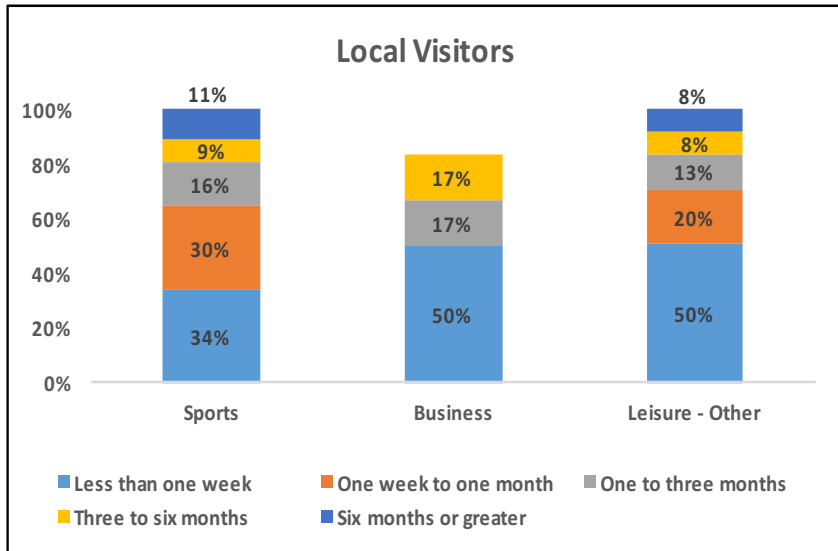


*Business and Leisure should be considered directional due to small sample size.

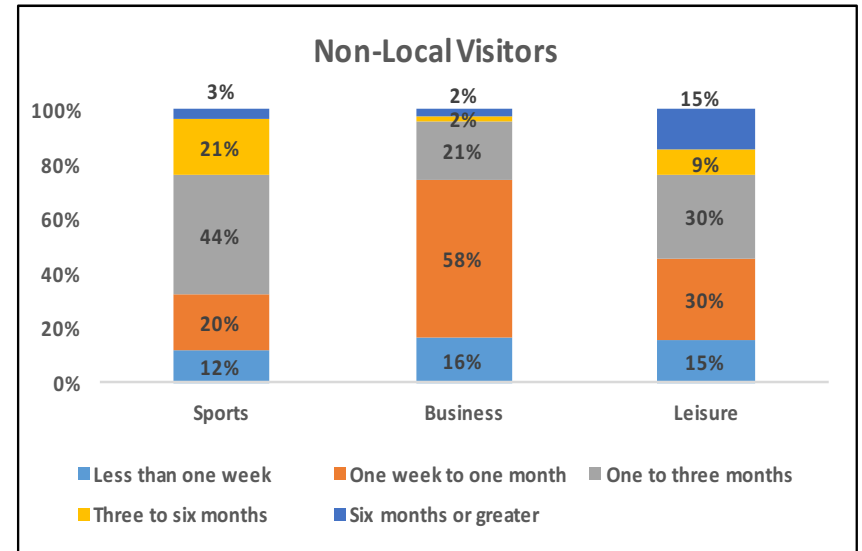
- Almost 40% of Sports visitor trav.
- Nearly one-third of the non-local visits in Hamilton County on a sports related trip were day trips, while 30% spend 3 to 4 nights.
- Almost one-third of the non-local business related visits to Hamilton County spent 7 or more nights.



Trip Planning Length, by Visitor Type



*Sports and Business should be considered directional due to small sample size.

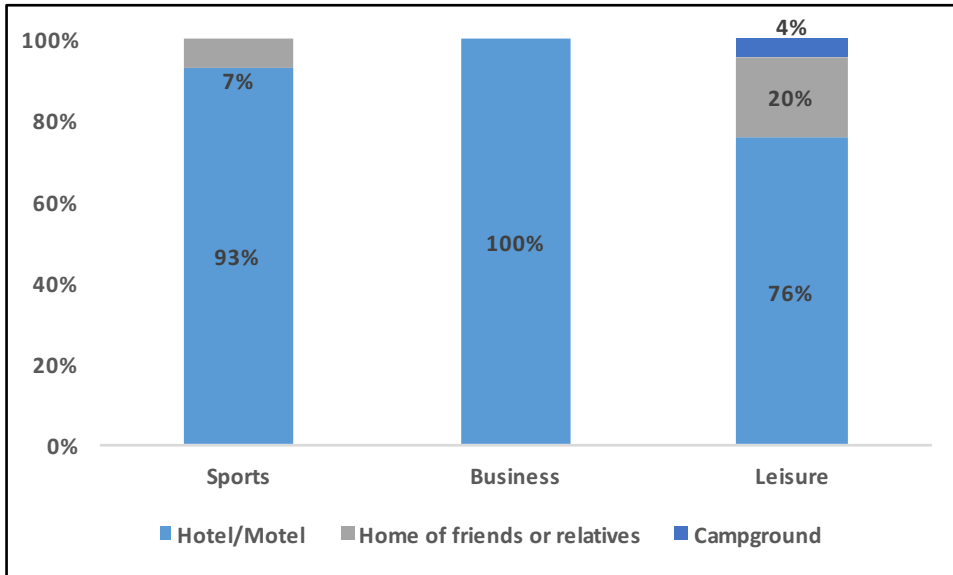


*Business and Leisure should be considered directional due to small sample size.

- Nearly half of non-local sports visitors reported spending one to three months planning their trip.
- Most non-local business visitors spent one week to one month to plan their trips.

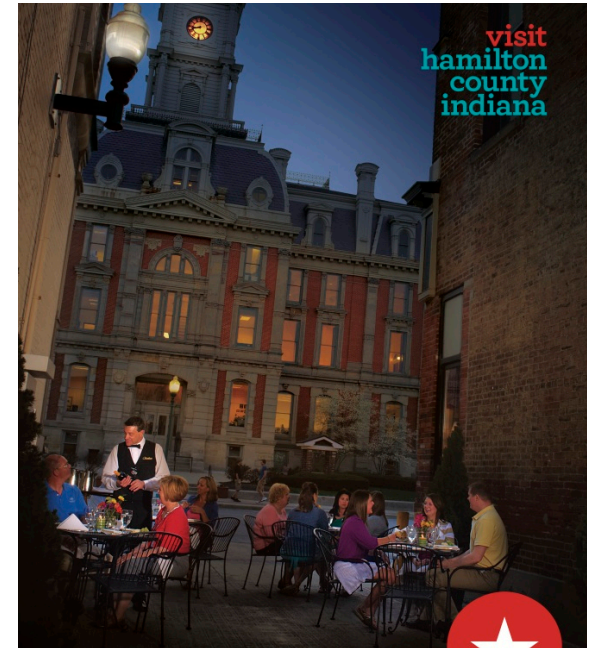


Lodging (Non-Locals Only)



*Business and Leisure should be considered directional due to small sample size.

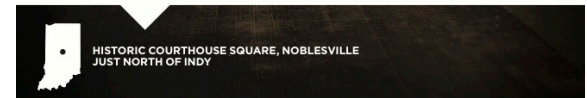
- Most visitors reported staying in hotels or motels. One-fifth of leisure visitors and less than 10 percent of sports visitors stayed with friends or relatives.



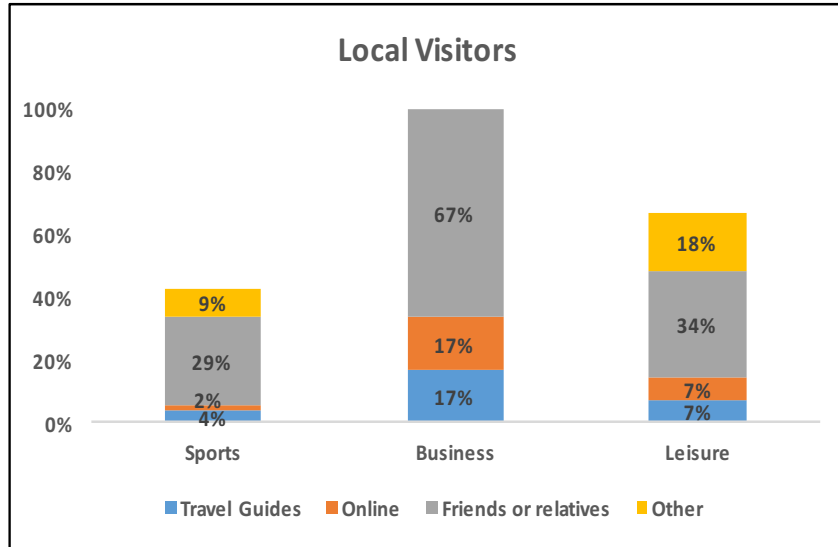
Like the getaway you've been waiting for, only closer.

Learn more at VisitHamiltonCounty.com

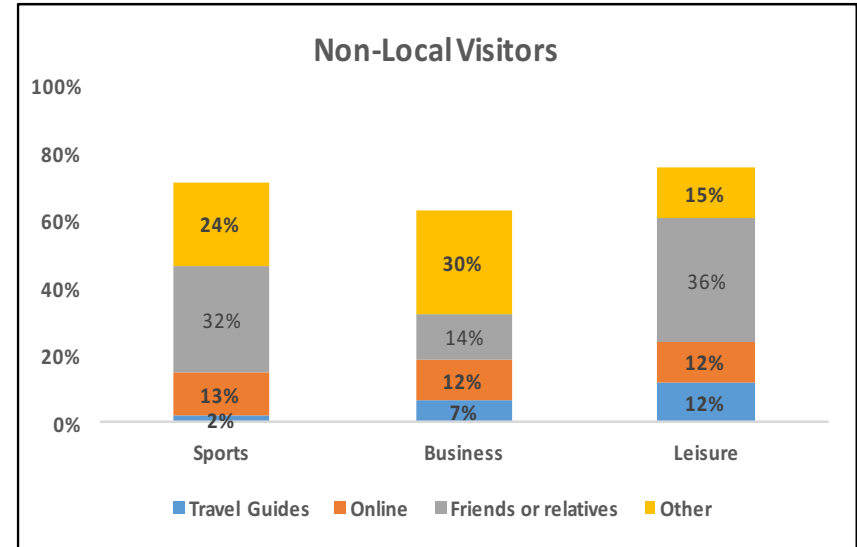
ARTS * HISTORY * SHOPPING * DINING * BIKING * HIKING



Trip Planning Resources, by Visitor Type



*Sports and Business should be considered directional due to small sample size.

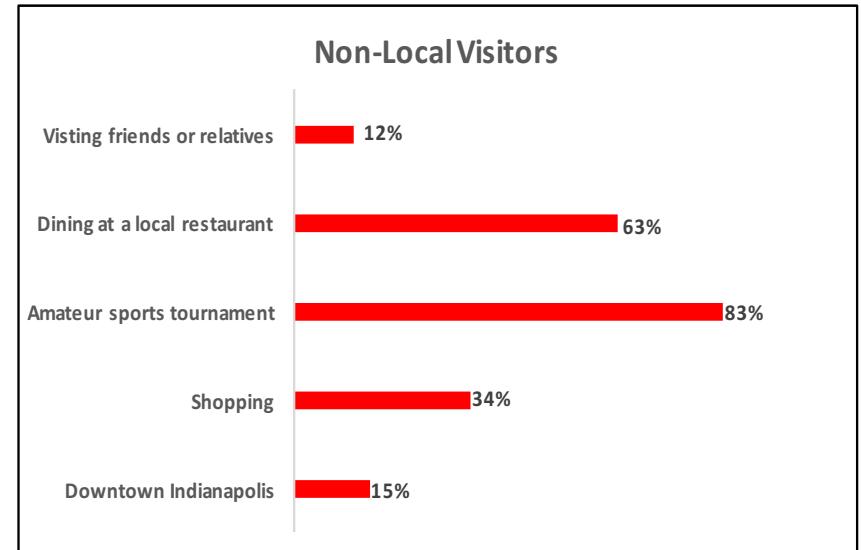
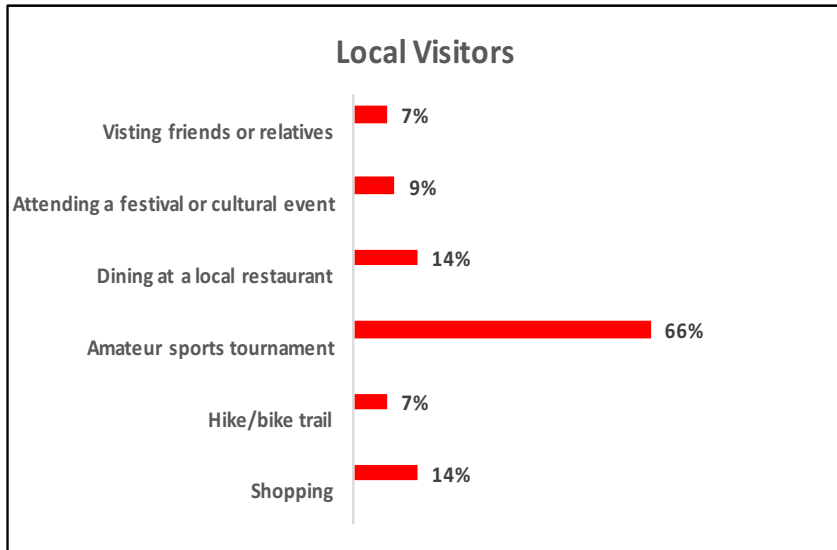


*Business and Leisure should be considered directional due to small sample size. Extended Stays (>14 days) removed.

- Friends or relatives are the most often sources of trip planning among local visitors.
- Additionally, friends or relatives are often used by non-local visitors for planning their trip to Hamilton County.
- "Other" resources was commonly reported by non-local visitors. For Sports visitors this may be a team manager or tournament organizer. Business visitors often reported a corporate travel manager.



Activities & Attractions Visited - Sports Visitors

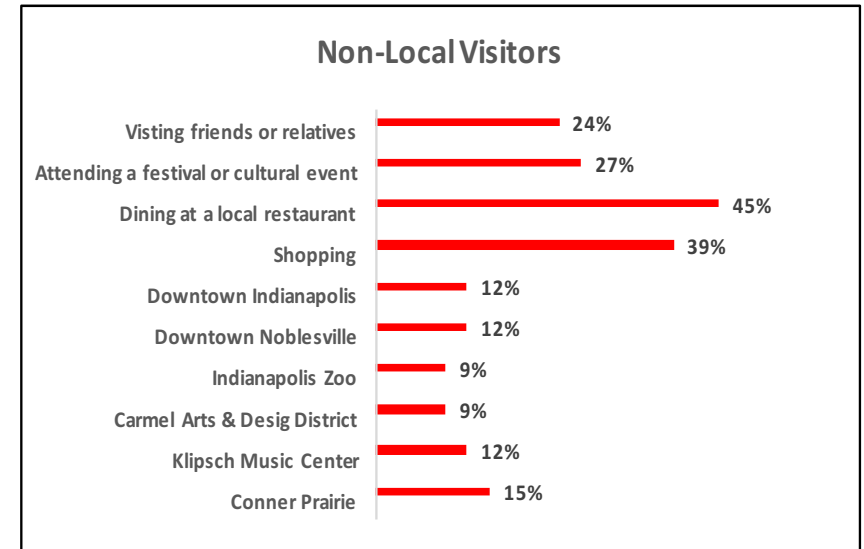
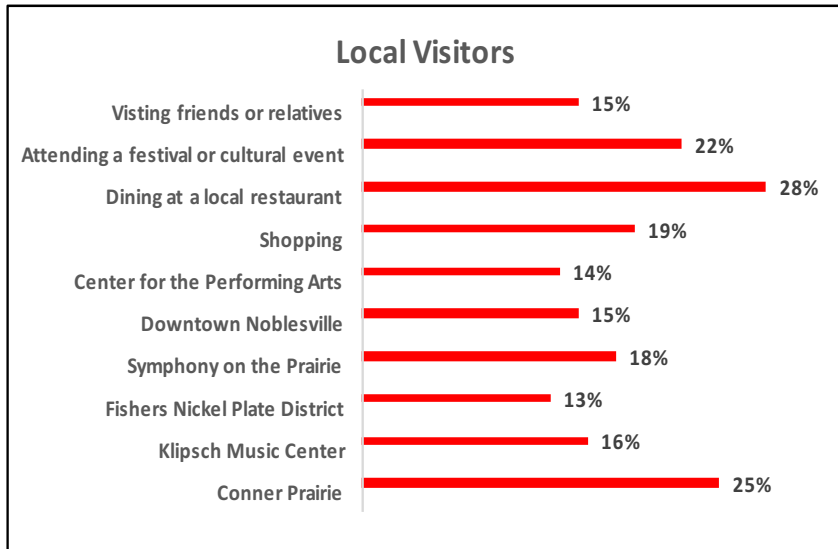


*Results should be considered directional due to small sample size.

- Naturally, Sports visitors reported attending an amateur sports tournament; however, both Local and Non-Local visitors reported shopping during their visit.



Activities & Attractions Visited - Leisure Visitors

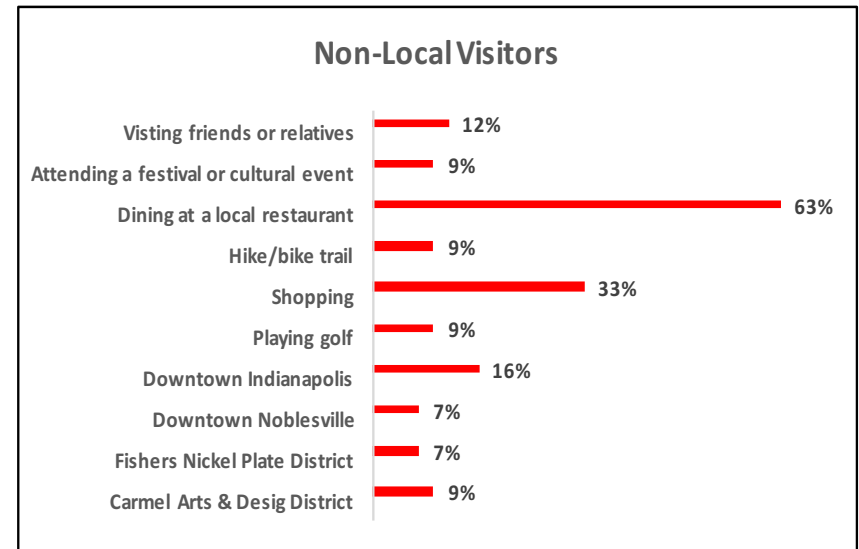
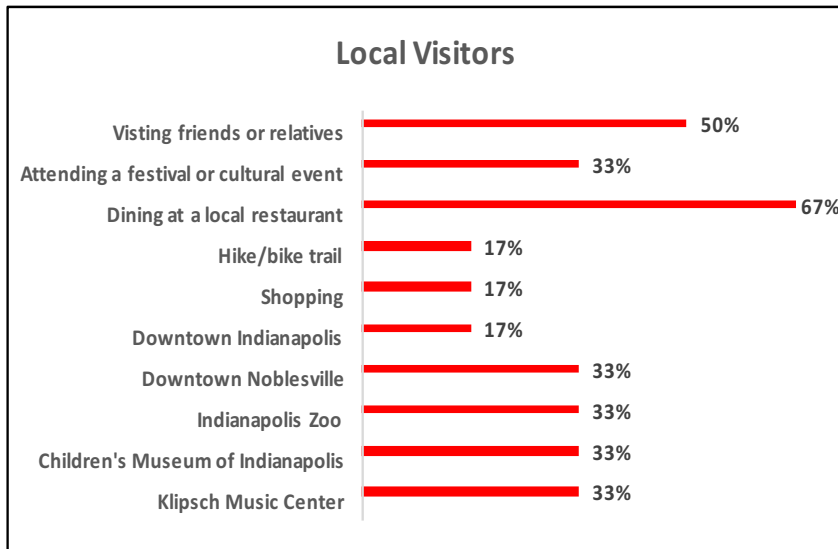


*Results should be considered directional due to small sample size.

- A higher percentage of Non-Local visitors reported dining at a local restaurant. This makes sense considering their visits are typically longer and Non-Locals may be looking for a unique dining experience.



Activities & Attractions Visited - Business Visitors

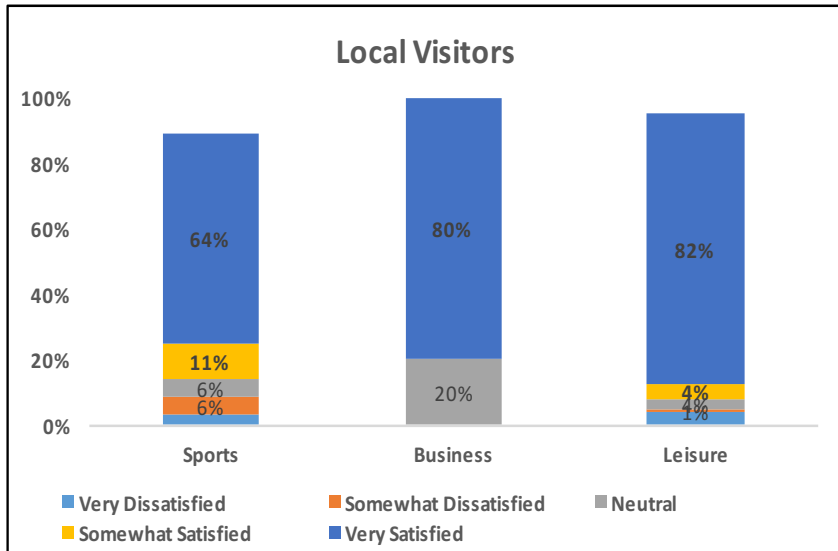


*Results should be considered directional due to small sample size.

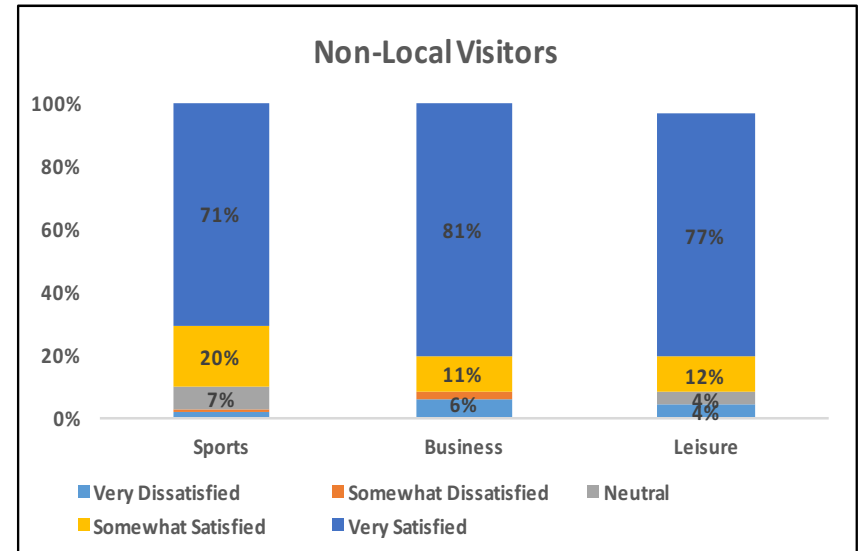
- Both Local and Non-Local business visitors reported visiting friends or relatives.



Overall Satisfaction



*Sports and Business should be considered directional due to small sample size.

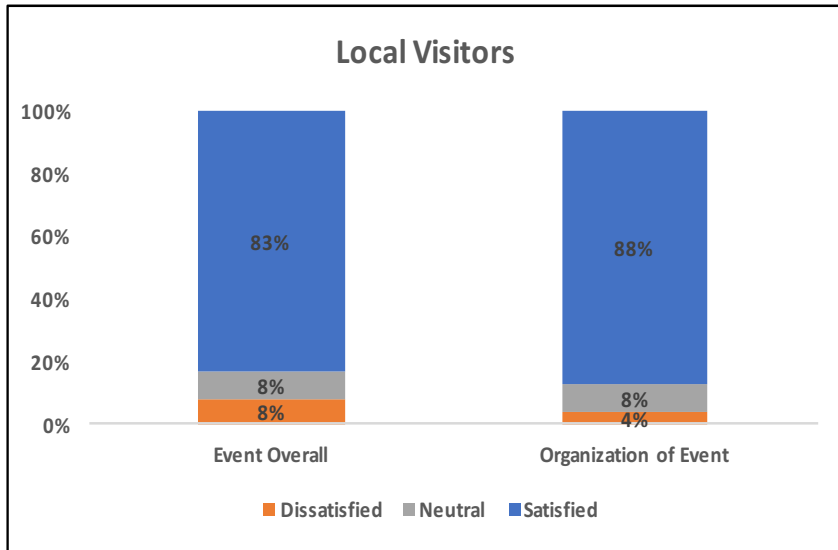


*Business and Leisure should be considered directional due to small sample size.

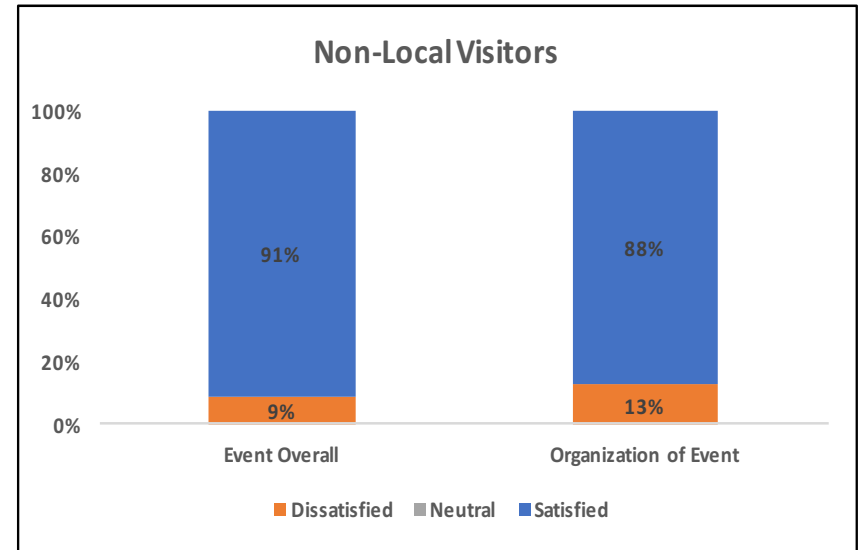
- A majority of visitors across all categories reported a satisfactory experience during their visit. Construction and traffic were commonly mentioned issues for both Local and Non-Local visitors. Non-Local Sports visitors commented on having more hotel rooms available close to Grand Park.



Grand Park Visitor Satisfaction



*Sports and Business should be considered directional due to small sample size.

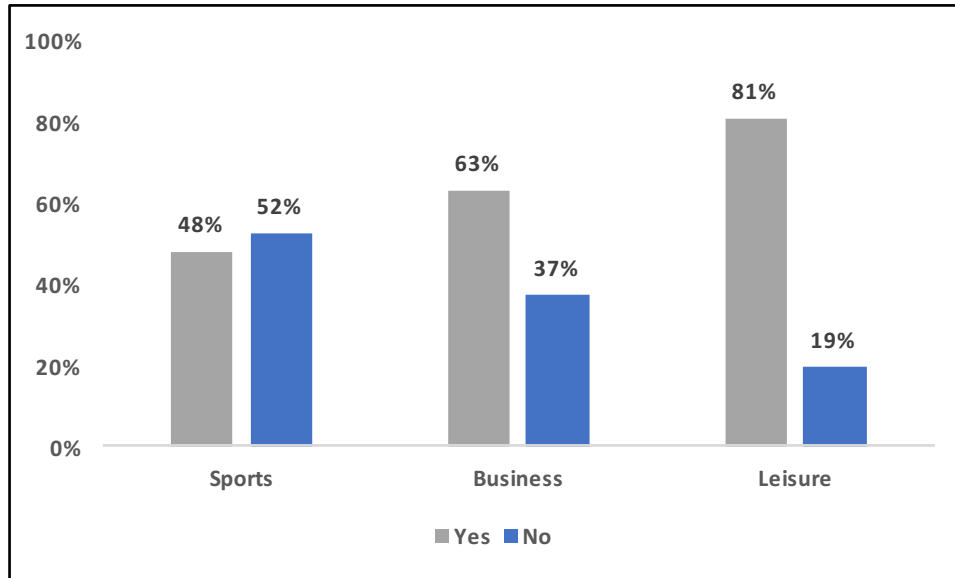


*Business and Leisure should be considered directional due to small sample size.

- Both Local and Non-Local visitors to Grand Park reported they were satisfied with both the overall event and the organization of the event.

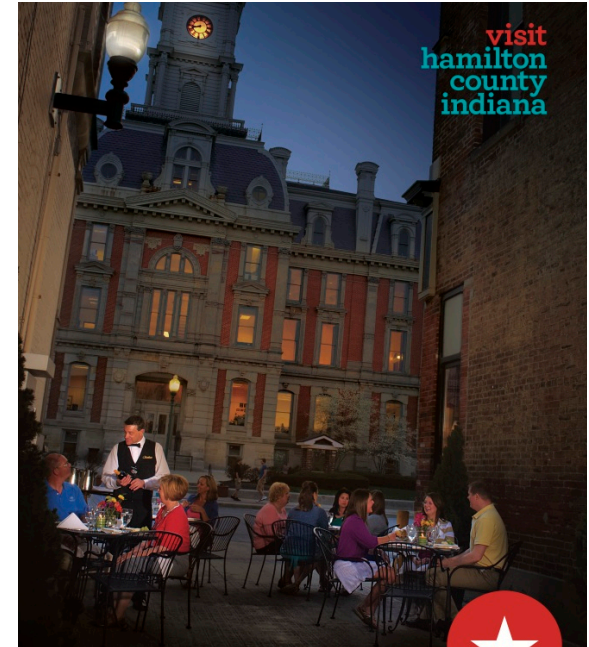


Return Visitors (Non-Locals Only)



*Business and Leisure should be considered directional due to small sample size.

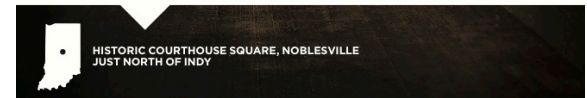
- Over half of the Sports visitors reported they had not been to Hamilton County prior to their visit.



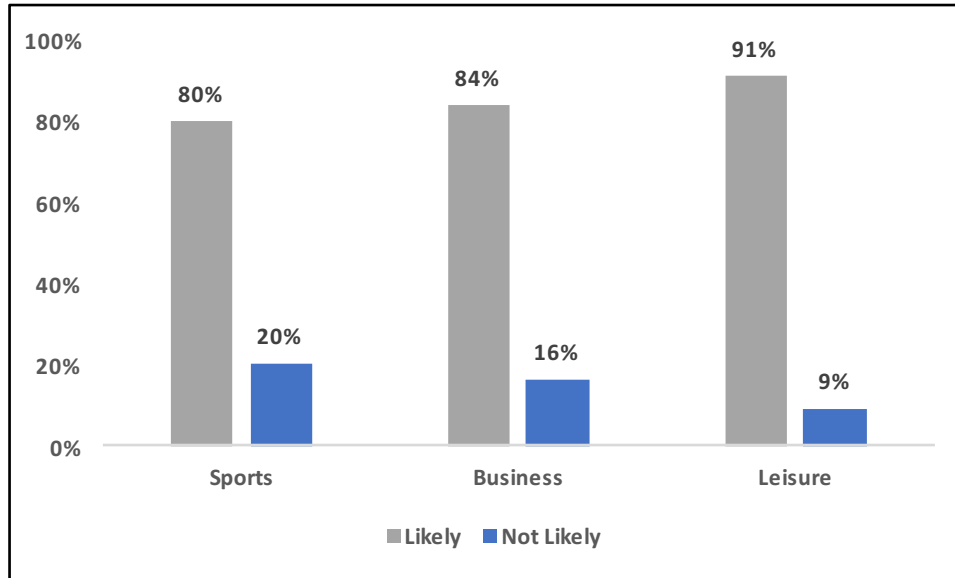
Like the getaway you've been waiting for, only closer.

Learn more at VisitHamiltonCounty.com

ARTS * HISTORY * SHOPPING * DINING * BIKING * HIKING

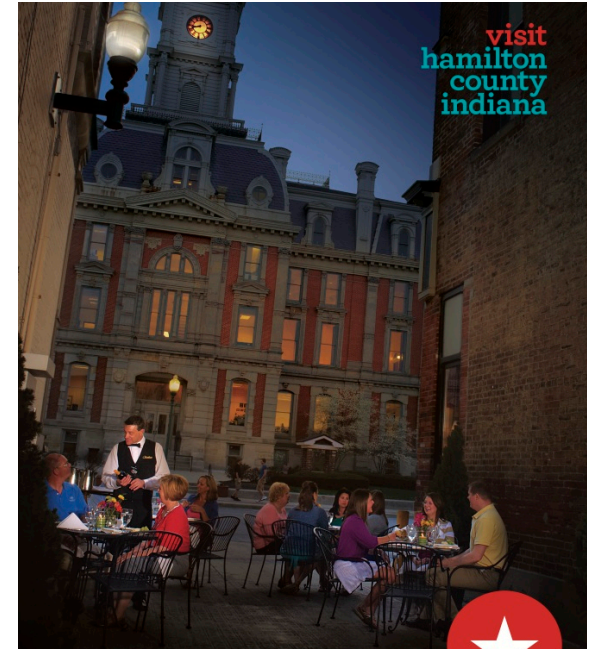


Likely to Return? (Non-Locals Only)



*Business and Leisure should be considered directional due to small sample size.

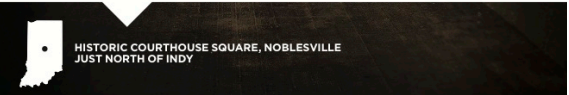
- Visitors in all categories overwhelmingly reported they are likely to visit Hamilton County again within the next 12-months.



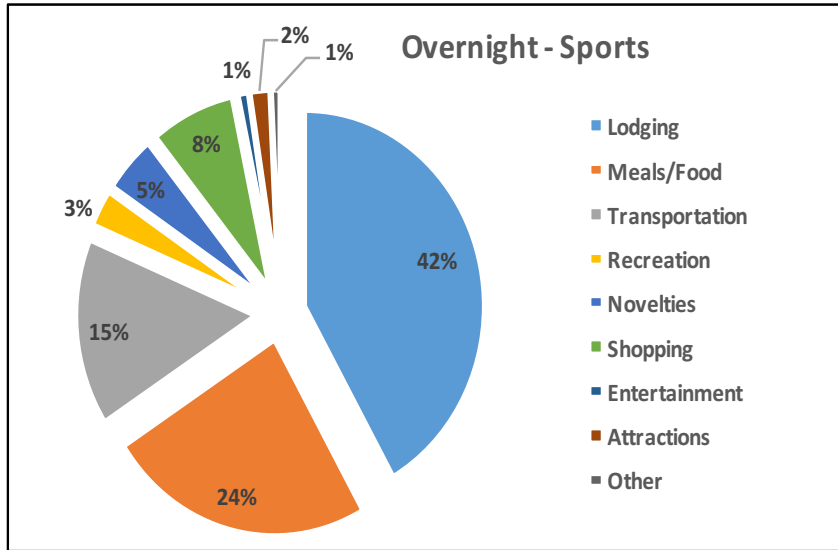
Like the getaway you've been waiting for, only closer.

Learn more at VisitHamiltonCounty.com

ARTS * HISTORY * SHOPPING * DINING * BIKING * HIKING



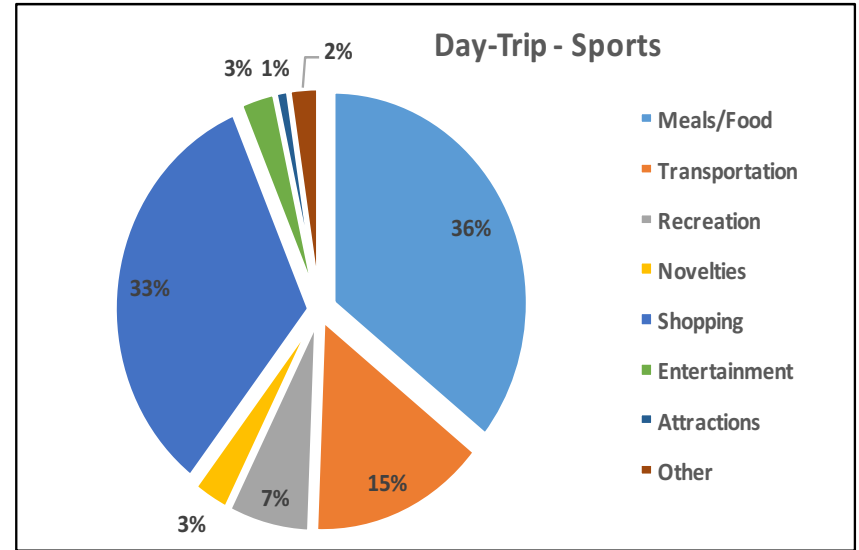
Visitor Spend - Sports



Per person, per day spend: \$138
Party spend: \$1,000

Grand Park

Per person, per day spend: \$154
Party spend: \$1,004



*Per person, per day spend: \$59
*Party spend: \$168

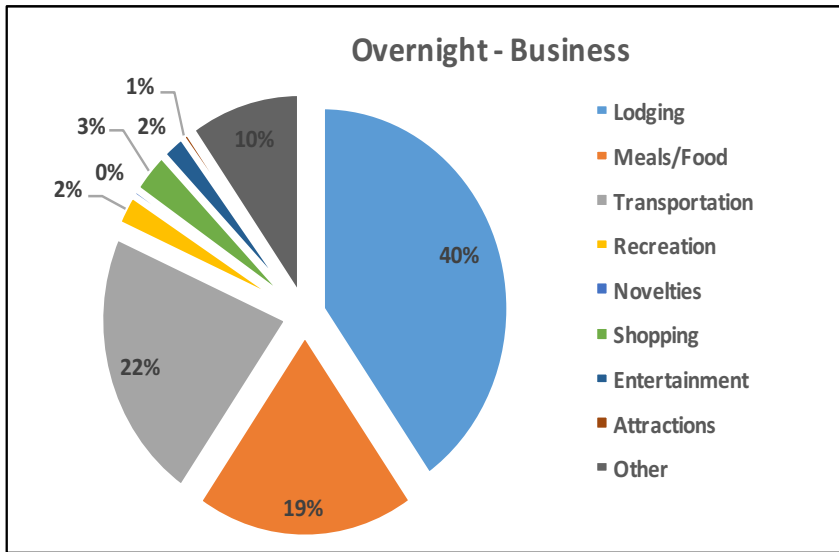
Grand Park

*Per person, per day spend: \$61
*Party spend: \$189

* Consider directional due to small sample size

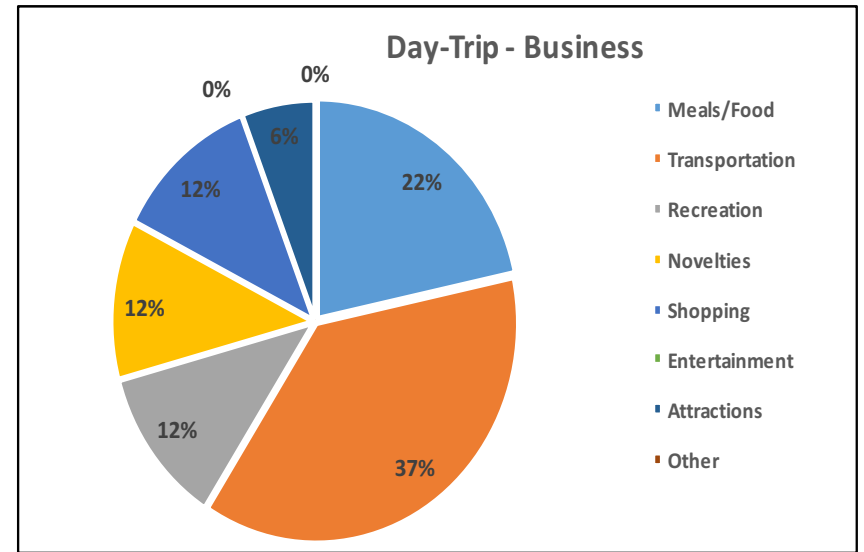


Visitor Spend - Business



*Per person, per day spend: \$150

*Party spend: \$1,811



*Per person, per day spend: \$76

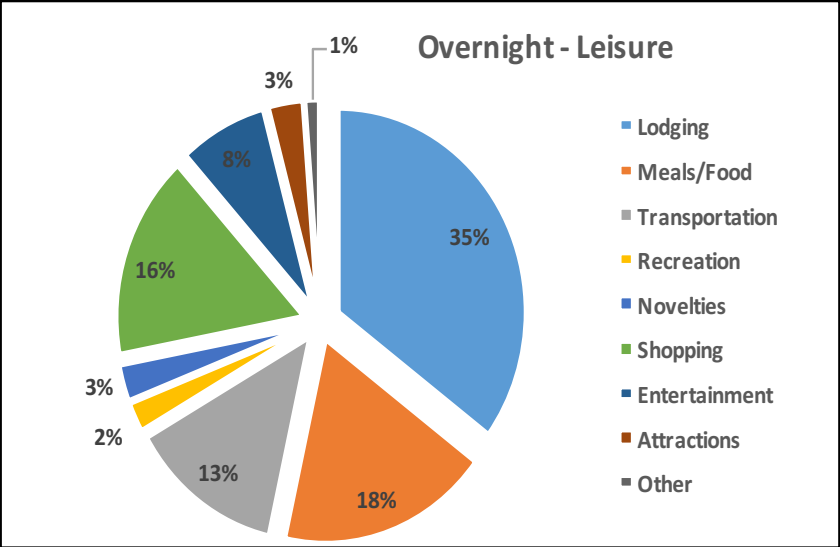
*Party spend: \$107

* Consider directional due to small sample size

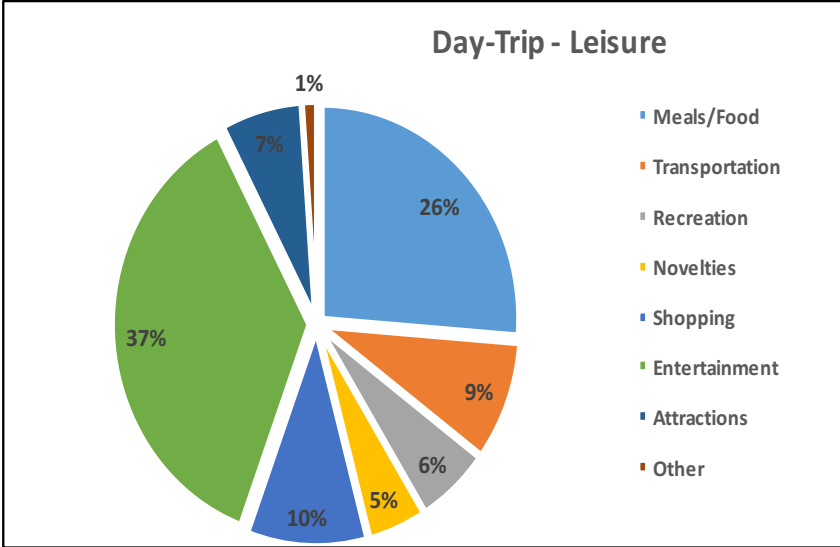
* Consider directional due to small sample size



Visitor Spend - Leisure



*Per person, per day spend: \$158
 *Party spend: \$1,099



Per person, per day spend: \$47
 Party spend: \$165

* Consider directional due to small sample size



Visitor Demographics

| Local Visitor Demographics | | | | | |
|----------------------------------|------------|--------|----------|---------|-------|
| Category | Grand Park | Sports | Business | Leisure | Total |
| Education | | | | | |
| High school or less | 8% | 6% | 17% | 10% | 9% |
| Some college/technical school | 13% | 13% | 33% | 20% | 19% |
| College graduate | 58% | 52% | 17% | 46% | 46% |
| Post-graduate | 21% | 29% | 33% | 24% | 25% |
| Income | | | | | |
| Less than \$35,000 | 3% | 2% | 50% | 9% | 8% |
| \$35,000 but less than \$50,000 | 6% | 4% | 0% | 12% | 10% |
| \$50,000 but less than \$75,000 | 6% | 10% | 33% | 18% | 17% |
| \$75,000 but less than \$100,000 | 23% | 27% | 0% | 20% | 21% |
| \$100,000 or more | 63% | 57% | 17% | 40% | 44% |
| Marital Status | | | | | |
| Married | 85% | 81% | 50% | 72% | 74% |
| Divorce/Separated | 8% | 9% | 0% | 7% | 7% |
| Widowed | 0% | 2% | 0% | 2% | 2% |
| Single/Never married | 8% | 8% | 50% | 19% | 17% |
| Gender | | | | | |
| Male | 47% | 46% | 33% | 31% | 34% |
| Female | 53% | 54% | 67% | 69% | 66% |
| Ethnicity | | | | | |
| Caucasian/White | 89% | 82% | 83% | 96% | 93% |
| African-American/Black | 5% | 5% | 0% | 0% | 2% |
| Latino/Hispanic | 0% | 2% | 17% | 3% | 3% |
| Asian American | 5% | 4% | 0% | 1% | 2% |
| Other | 0% | 2% | 0% | 0% | 0% |

*Sports and Business should be considered directional due to small sample size.

| Non-Local Visitor Demographics | | | | | |
|----------------------------------|------------|--------|----------|---------|-------|
| Category | Grand Park | Sports | Business | Leisure | Total |
| Education | | | | | |
| High school or less | 6% | 5% | 0% | 6% | 4% |
| Some college/technical school | 20% | 21% | 27% | 34% | 25% |
| College graduate | 40% | 40% | 63% | 34% | 45% |
| Post-graduate | 34% | 34% | 10% | 25% | 26% |
| Income | | | | | |
| Less than \$35,000 | 1% | 1% | 10% | 6% | 4% |
| \$35,000 but less than \$50,000 | 5% | 4% | 14% | 3% | 7% |
| \$50,000 but less than \$75,000 | 14% | 14% | 14% | 29% | 17% |
| \$75,000 but less than \$100,000 | 19% | 18% | 26% | 16% | 20% |
| \$100,000 or more | 60% | 62% | 36% | 45% | 52% |
| Marital Status | | | | | |
| Married | 94% | 94% | 67% | 94% | 87% |
| Divorce/Separated | 6% | 5% | 9% | 3% | 6% |
| Widowed | 0% | 0% | 0% | 0% | 0% |
| Single/Never married | 0% | 1% | 23% | 3% | 7% |
| Gender | | | | | |
| Male | 30% | 31% | 67% | 28% | 39% |
| Female | 70% | 69% | 33% | 72% | 61% |
| Ethnicity | | | | | |
| Caucasian/White | 93% | 93% | 93% | 100% | 95% |
| African-American/Black | 2% | 2% | 0% | 0% | 1% |
| Latino/Hispanic | 4% | 3% | 2% | 0% | 2% |
| Asian American | 0% | 0% | 2% | 0% | 1% |
| Other | 1% | 1% | 2% | 0% | 1% |

*Business and Leisure should be considered directional due to small sample size.



How do I get in on the fun?

