

Springfield, Missouri Visitor Profile Report (FY14-16)



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Growth Summary



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Growth Summary - Insights

- The top ten origin markets represent critical markets for Springfield, providing nearly 70% of visitors.
- Over 90% of Springfield visitors are repeat visitors. Springfield is not attracting new visitors at the same rate as typically 20% of visitation to a destination are first timers.
- The typical Springfield visitor is 50 years old, white and 96% are heterosexual.
- A Springfield visitor has an annual household income of \$63,000, which is \$9,000 less than the average traveler household income.
- Springfield visitors are as well educated as the average traveler as 27% hold a college degree.



Growth Summary – Insights (continued)

- Ten percent of visitors traveled for sporting events in last 12 months.
- Visitors stay in hotel and private homes at a higher percentage than the typical US traveler and less likely to use a shared economy accommodation such as Airbnb.
- Springfield travel parties tend to be slightly smaller than the average US travel party and spend approximately \$100 less per trip.
- Visitors drive to Springfield at a higher percentage than most destinations.
- Activities participated in are fairly representative of most destinations and visitors are also fairly satisfied with their visit.



Growth Summary – Precise Plans for Growth

- Maintain focus on larger nearby markets within driving distance (such as Springfield itself, St. Louis, Kansas City and Joplin).
- The high percentage of repeat visitation works well when the economy is soft; however, the bureau needs to focus on new visitation.
- The paid accommodation sector is strong and the shared economy appears to be having little impact on the accommodation landscape.
- Travel party sizes are directly linked to spending, and as such, a smaller Springfield travel party size is impacting spending levels.



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Background and Research Methods



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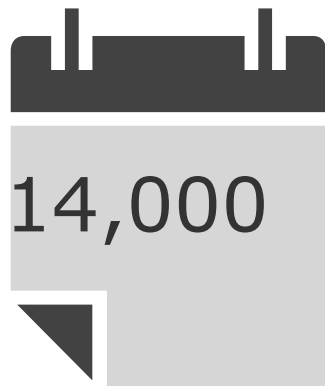
Background

TravelsAmerica is a syndicated online tracking study using the TNS Lightspeed domestic panel to provide leisure and business travel information to the travel industry.

- TNS does all questionnaire development, data collection and data processing then licenses the results to various clients in the travel industry.
- Started as a mail survey in a competing research firm, taken over by TNS in 2005 with a fully online methodology.
- Clients purchase licensing rights to our data which includes Word and Excel tables, SPSS files and access to a crosstab package.
- Clients can purchase custom reports and/or custom surveys tied to the main TravelsAmerica study.



TravelsAmerica: We speak to travelers – lots of them



households
a month...



...that's
168,000
American
households
each year...



...and over
1 million in the last
6 years

We are the official research vendor of record to the

U.S. TRAVEL
ASSOCIATION



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Detailed Findings



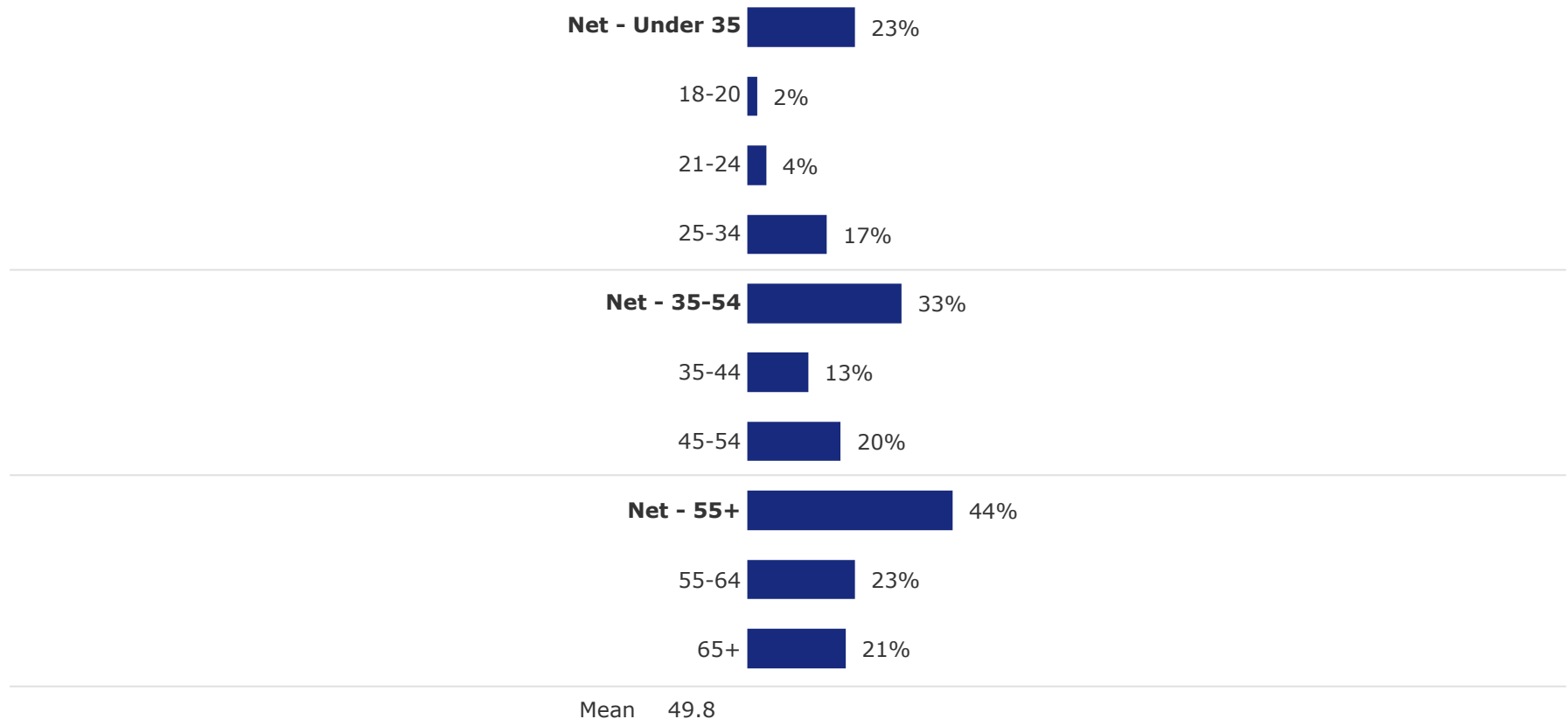
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Average Age of Springfield Visitor

The average age of the Springfield visitor is on par with the average American traveler at nearly 50 years old.



Base: Total Respondents
QD. How old are you?



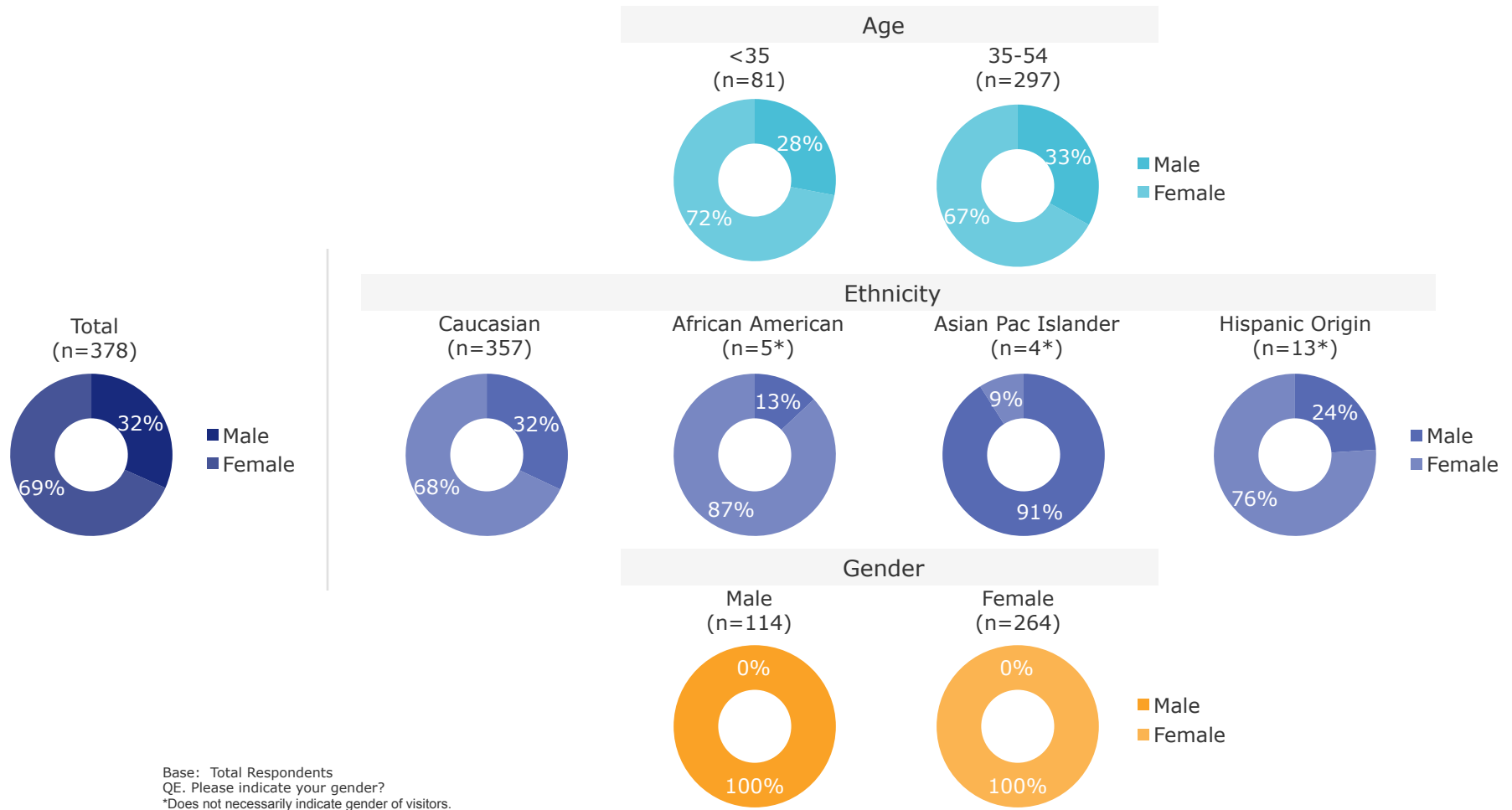
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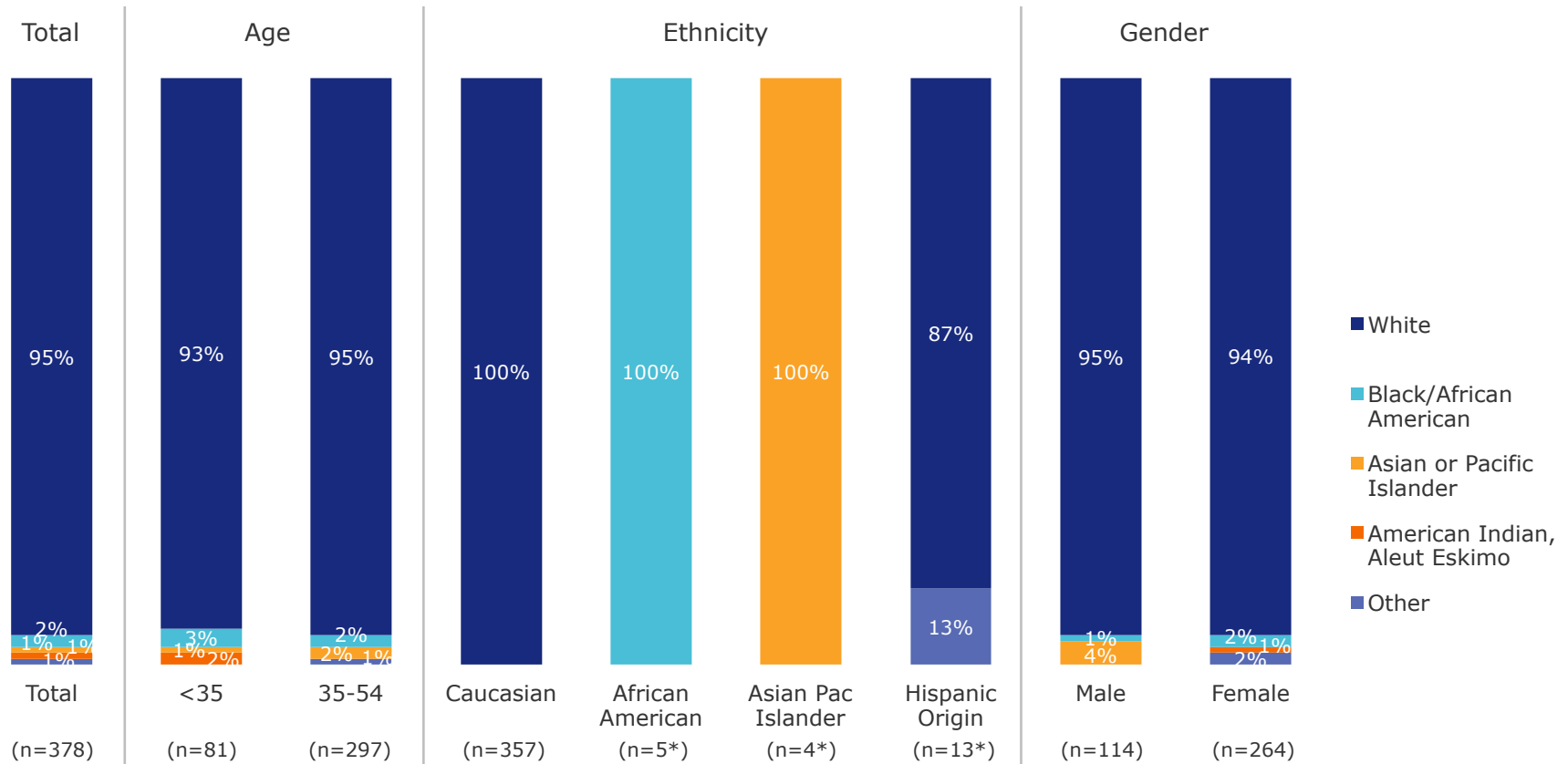
Gender Breakdown of Survey Respondents

Note that a vast majority of survey respondents are female and does not necessarily represent the gender of all Springfield visitors.



Ethnicity of Springfield Visitors

Springfield visitors are overwhelmingly white, much more so than the average American traveler.



Base: Total Respondents
Ethnicity



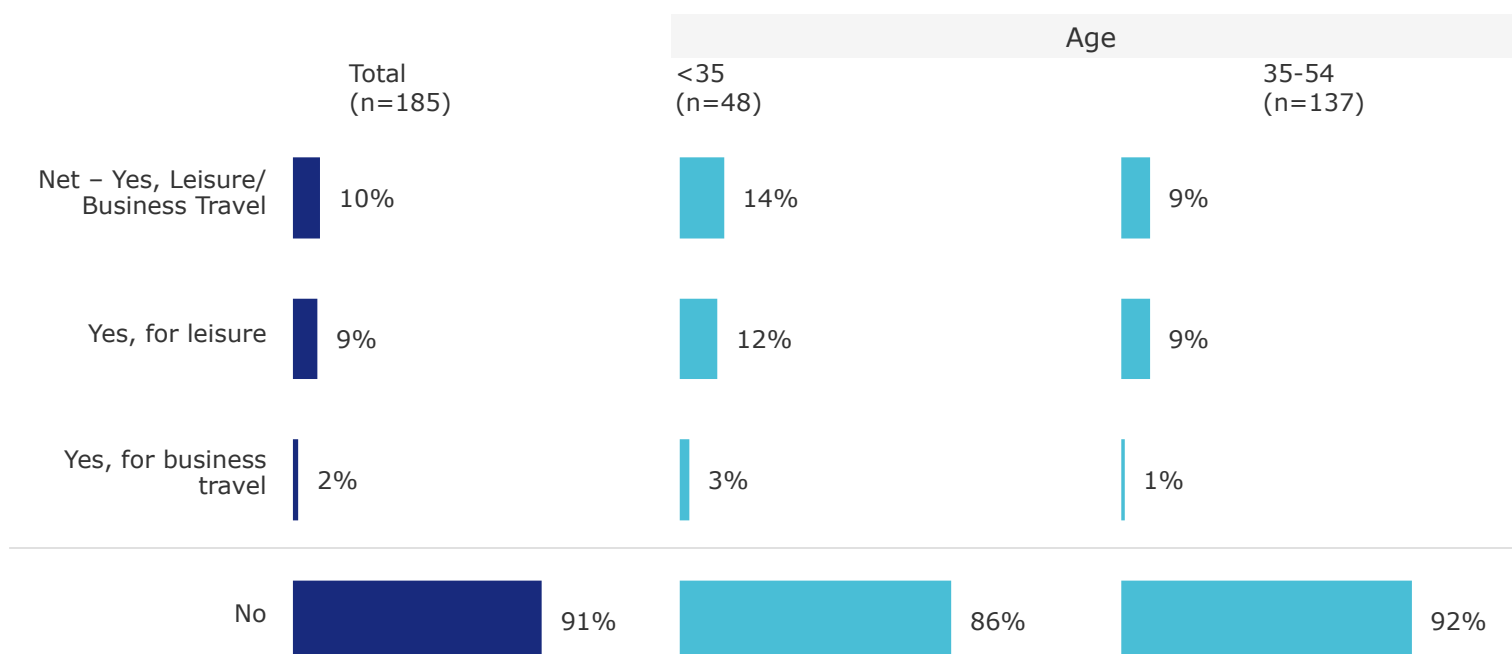
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Usage of Shared Economy (AirBnB, VRBO, etc.)

Springfield visitors are less likely to use shared economy accommodations as the US average is 20%.



Base: Total Respondents
Q32. Have you used the shared economy (AirBnB, VRBO, etc.) for accommodations for any trips in the past 12 months?



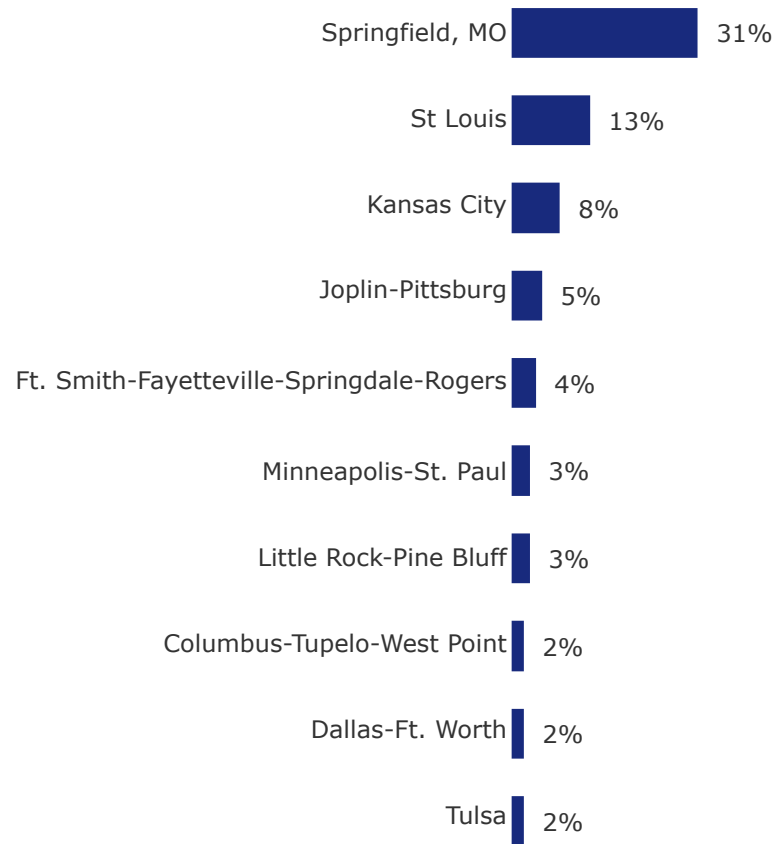
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Top 10 Origin Markets (DMA) to Springfield

The majority of visitors from the Springfield, MO DMA are day-trippers.



Base: Total Respondents
DMA

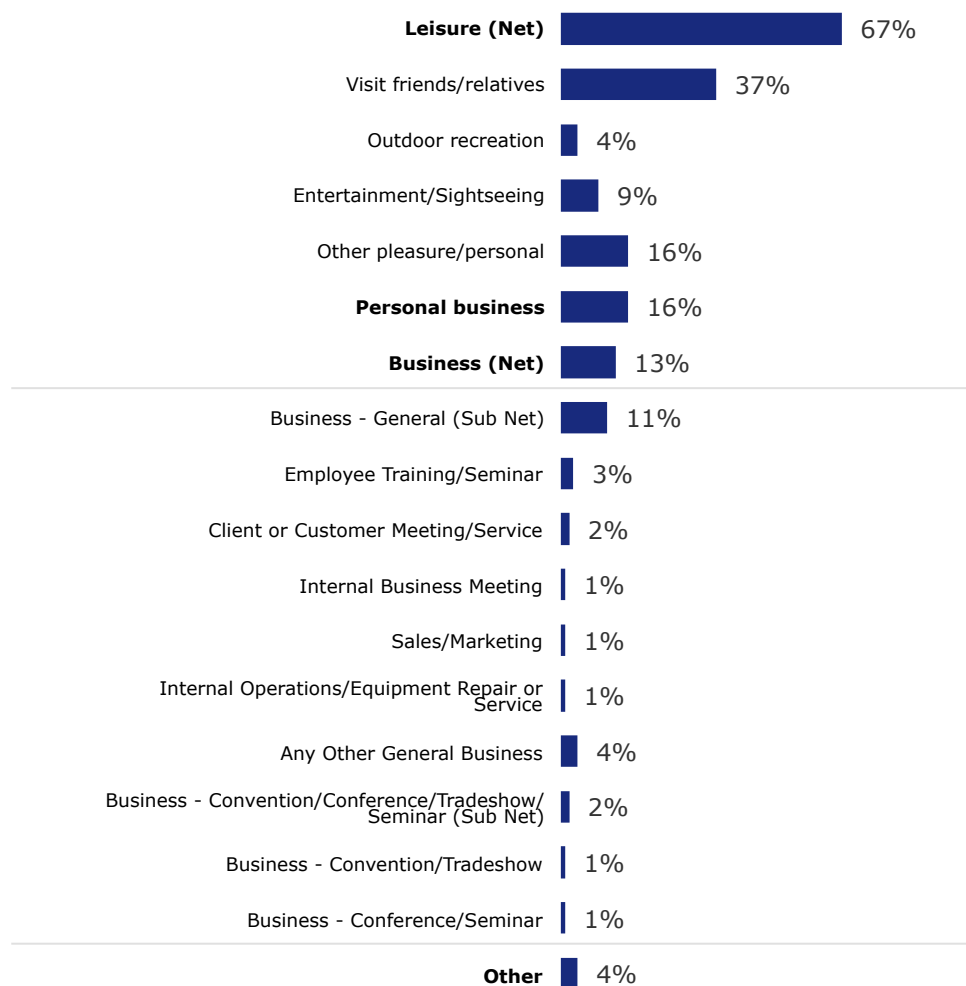


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Primary Purpose of Travel



Base: Total Respondents
Q1B. Please select the primary purpose for trips in the month of ...?

- 42% of all US leisure trips are for the purpose of visiting friends and family compared to 37% for Springfield.
- 30% of Springfield visitors are from the Springfield DMA, indicating that they are likely day-trippers. These visitors are included in the leisure net.
- All business travel is historically under-represented due to the fact that 72% of respondents were female and are more likely to say they took a leisure trip.
- These figures are meant to give a baseline to look for trends such as historical increases or decreases instead of absolute numbers.



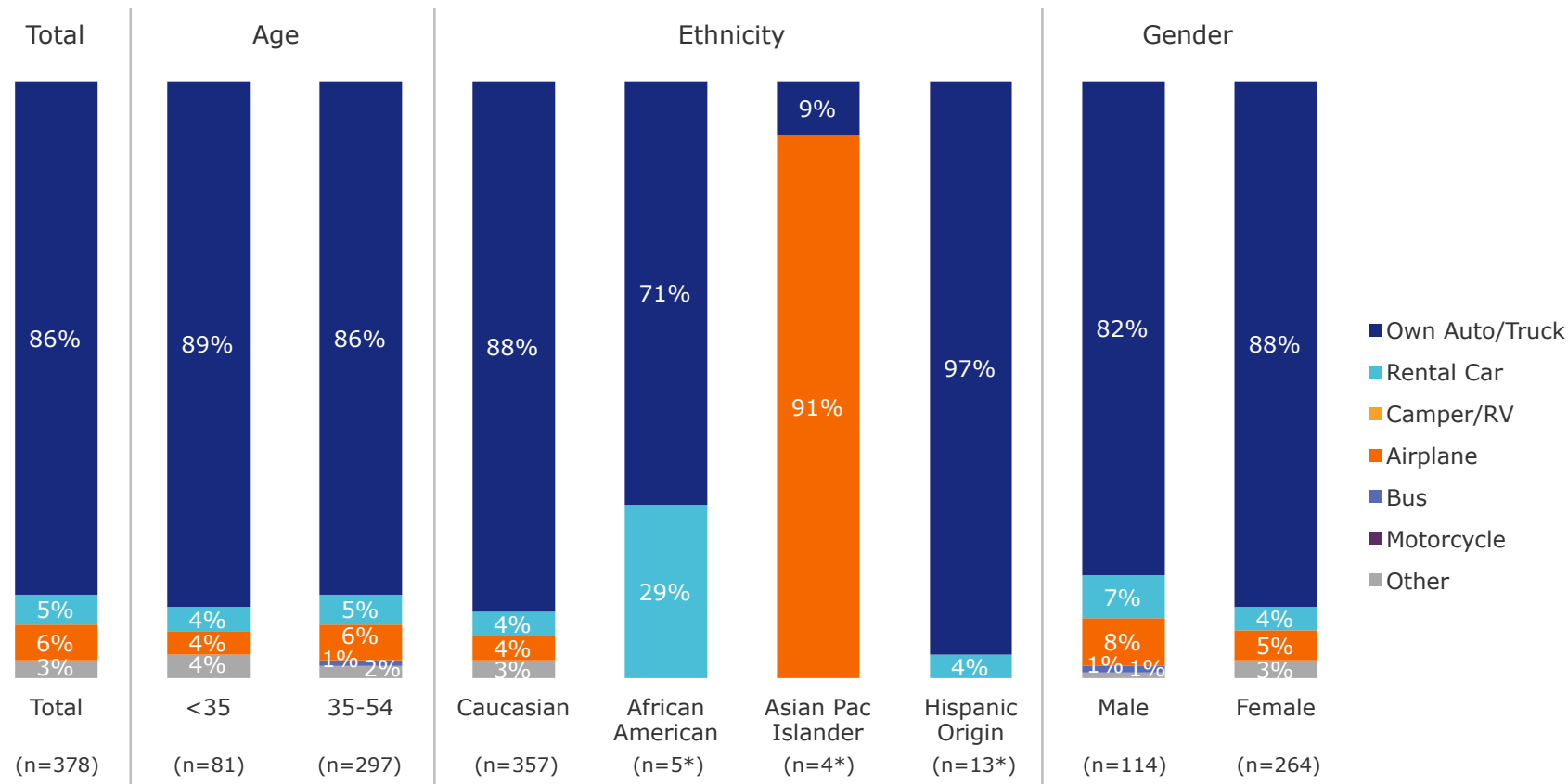
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Primary Mode of Transportation to Springfield

Like most destinations, Springfield is a drive market.



Base: Total Respondents
Q2B. Which of the following was the primary mode of transportation for the month of ...?



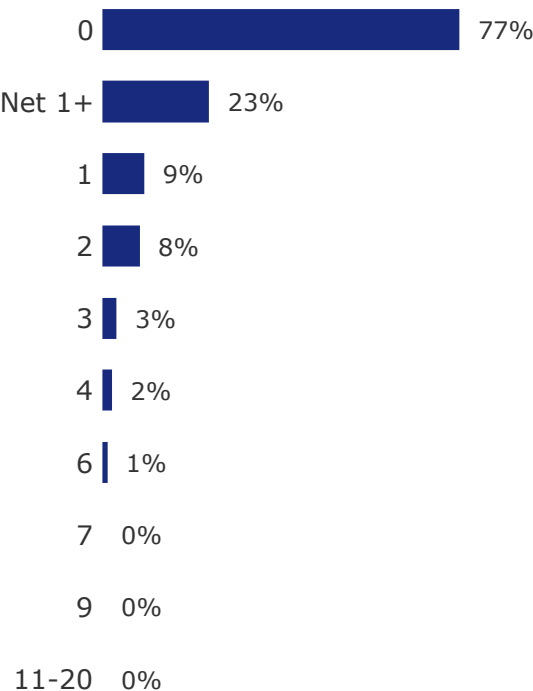
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Number of Travel Party Members Under 18

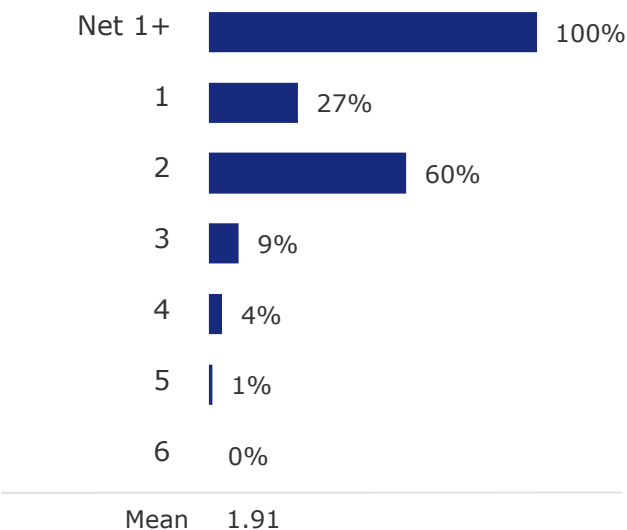
77% of Springfield visitors did not bring children on their trip to Springfield.



Base: Total Respondents
Q3A. Number of travel party members ages under 18



Number of Travel Party Members Over 18

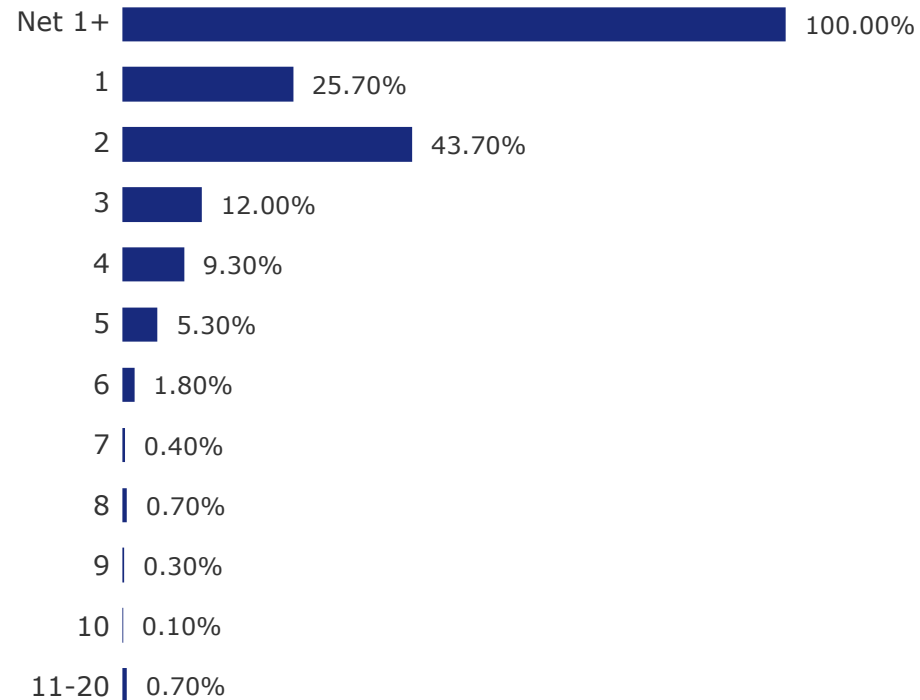


Base: Total Respondents
Q3A. Number of travel party members ages 18+



Average Travel Party Size

Springfield travel parties are nearly one person smaller than the average American travel party.



Average Travel Party Size 2.45

Base: Total Respondents
Q3A. Number of travel party members ages 18+

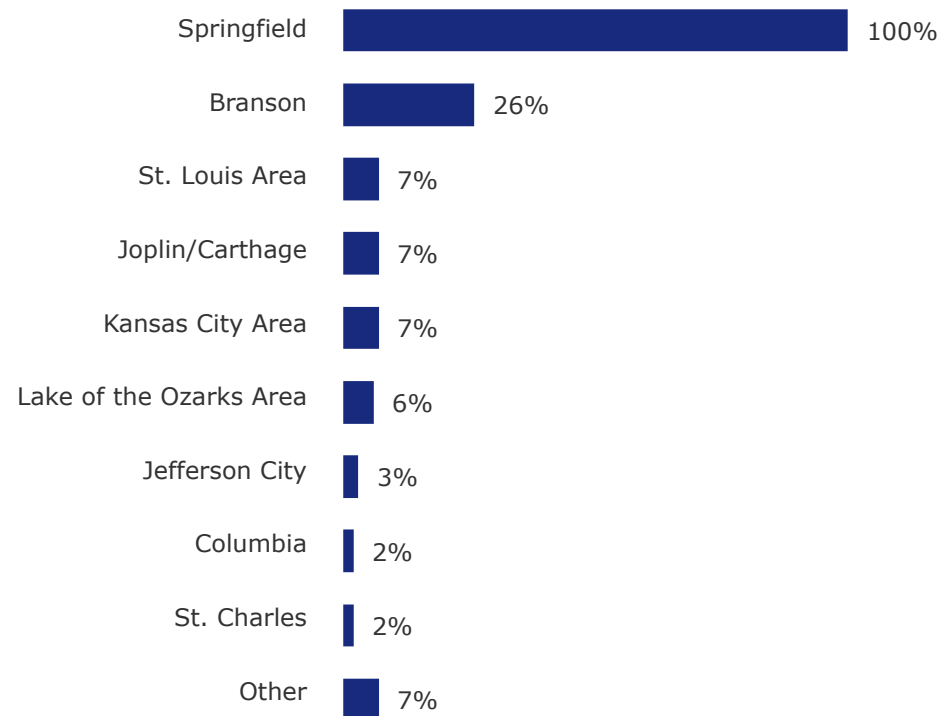


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Other Missouri Cities Visited



Base: Total Respondents
Q4D. Please indicate the cities and/or places visited.



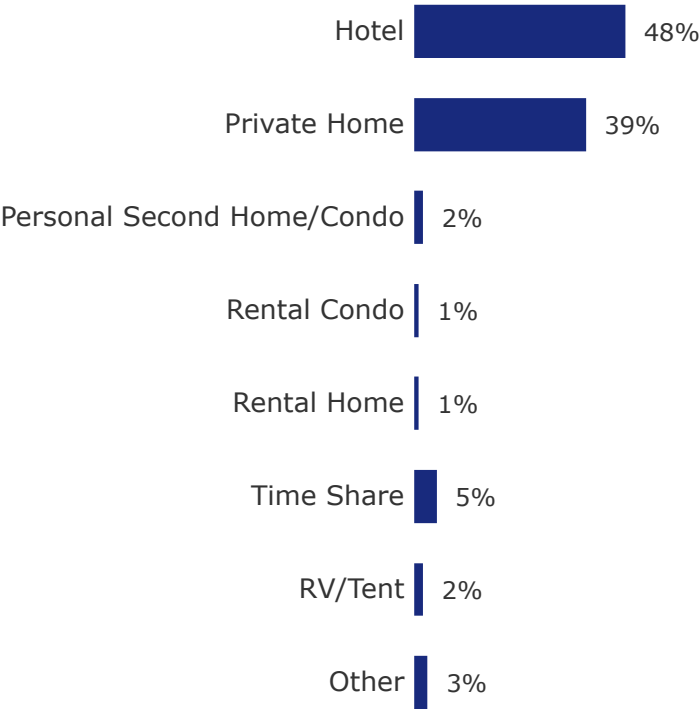
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Overnight Accommodations

Springfield has a higher percentage of visitors staying in paid accommodations than the average destination.

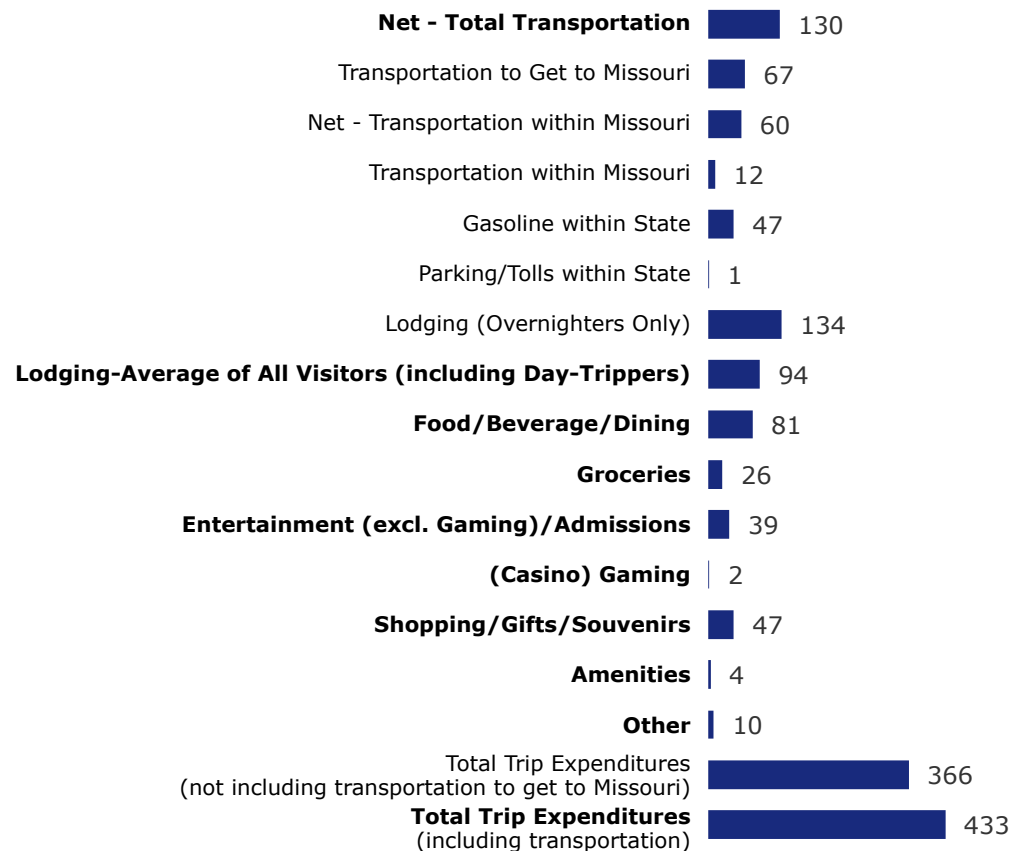


Base: Total Respondents
Q4F. Number of Nights Spent (States Only) - Proportion Summary Table (Incidence based to Total Mentions)



Visitor Expenditures

Springfield visitors spend approximately \$433 per trip and \$100 less than the average American travel party.



Base: Total Respondents

Q4G. Please indicate the total dollar (\$) amount spent by your travel party (including all travel party members in state X listed below during your trip in the month of X.)



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Top Activities

Net - Family Activities/Reunion 42%

Visiting relatives 32%

Visiting friends 21%

Family reunion 4%

Net - Entertainment/Amusement 40%

Shopping 27%

Fine dining 10%

Theme park/Amusement park/Water park 7%

Craft breweries 3%

Casino/Gaming 2%

Special events/Festival 2%

Wine tasting/Winery tour 1%

Nightclubs/Dancing 1%

Spa/health club 1%

Distilleries 1%

Rodeo/State fair 0%

Base: Total Respondents

Q4H. For each US state you visited during trip X in the month X, please check all of the following activities you did/attractions you visited.

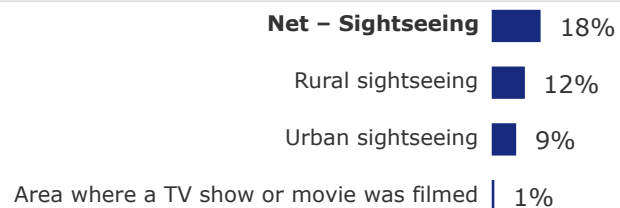
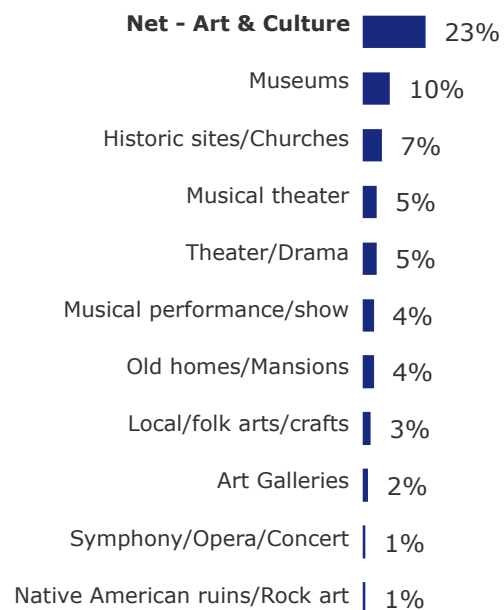


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Top Activities (continued)



Base: Total Respondents
Q4H. For each US state you visited during trip X in the month X, please check all of the following activities you did/attractions you visited.



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Thank You!

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