Strategic Marketing & Research, Inc.

Indiana Office of Tourism Development

Product Development Research

October 2006

TABLE OF CONTENTS

BACKGROUND & OBJECTIVES

Tourism, an important industry in Indiana, contributes significantly to the state's economy. Traditionally, the state tourism office has worked to market the state and attract additional visitors, but not to develop the tourism product or improve visitors' experiences. By setting up the Indiana Office of Tourism Development (IOTD) as a stand-alone agency, the importance of the industry was recognized and enhanced. With its new structure, a strategic plan was developed and, included in that plan, was a focus on supporting the development of new products which would assist in attracting more visitors.

As part of IOTD's strategic plan, it was deemed necessary to gain greater insight into the types of trips that people take to Indiana as well as their interest in various product options. This information would provide a guide to IOTD for future planning, marketing and development efforts. The goal of this research is to provide insight into the overall travel environment and pinpoint the factors, attractions and packages of experiences which *cause* people to choose a destination.

The specific informational objectives of this research included the following:

- **Investigate the current Midwest tourism market** in terms of trips, trip types, destinations and motivations;
- **Gather information on target visitor groups** and their destination preferences and motivators;
- **Identify key motivators in terms of product options**;
- **Evaluate familiarity** with Indiana's existing tourism product;
- **Assess the barriers to additional visitation** and quantify the impact of image versus the impact of product deficits;
- **Explore the types of attractions and themes** which are most compelling to consumers and most likely to increase visitation;
- **Study the existing golf market** to assess the prevalence of these trips, the specifics of these trips and consumers interest in visiting Indiana to golf; and
- **Provide conclusions and recommendations** regarding the best strategies to pursue in terms of product development.

METHODOLOGY

The goal of this survey was to gather an extensive inventory of trips and travel to assess what people do, what motivates their travel and how to best increase visitation through product packaging and development. To accomplish this, an on-line survey was conducted among 1361 respondents within Indiana and its surrounding states. This included a general sample and a group of people that had requested information regarding golf. The survey included an inventory of recent trips including destination, duration and motivation. Consumers were asked to record up to six (6) trips and then to give more detailed information on as many as two. The survey also explored interest in a variety of product ideas. A copy of the survey is included in the Appendix.

Upon completion of data collection, a data set was compiled from all the surveys. The data were weighted to represent the overall regional population. The open-ended questions were coded and several statistical procedures were used to analyze the results.

The following summarizes the key findings and includes information and recommendations relative to product development overall as well as information about the golf market.

TRIP MOTIVATORS & TYPES

In developing and promoting “products” which will attract tourists to Indiana, it is critical to identify the activities and attractions which will motivate people to choose a destination or plan a trip. The wealth of research which has focused on this type of motivation has been frustrating because the main “motivators” for travel are fairly general – to have fun, to get away from it all, to have time with family, etc. In addition, these findings can be confusing since what is “fun” for one potential visitor does not apply to others. As such, the key to exploring product options is to be more specific and identify the activities and attractions which spurred specific trips. This provides more concrete examples and a quantification of motivators.

As noted, this research gathered information on trips which people had taken in the past two years, with some information on 7300 trips (destination, month and duration) and detailed information on 1825 trips. Analysis of this information provided insight into why people travel and why they choose specific destinations.

First, people were asked an open-ended question regarding the purpose of their trip. This provided insight into what consumers view as the reasons for traveling. Many noted family motivations – to visit family, to attend a wedding or event. Interestingly, many others mentioned that the purpose of their trip was to visit a specific place or destination, while some mentioned the more general motivations which have been mentioned (fun, relaxation, etc). To further explore motivations, in addition to the open-ended question, the research asked people what did on their trips and how much those activities motivated their travel.

This research is based on the premise that for something to be a motivator for travel – it has to be something that people actually did during their trip. However, people enjoy many activities during a trip which are not motivators. The respondents were asked about their participation in several activities. They were then asked to identify those which motivated them to choose a specific destination.

When reviewing activities, it becomes clear that people like to do lots of things, generally reporting an average of 3 activities per trip. Shopping was the most popular option, followed by enjoying parks and natural areas and city/urban sightseeing. Yet, this does not mean that people choose a destination because of the shopping that is available. As will be highlighted, some of these activities are motivators, while others are included as part of the trip because they are available.

Activities Overall

Activities	Overall
Shopping	32.1%
Enjoy parks & natural areas	25.6%
City/urban sightseeing	22.2%
Social or family event (inc. wedding/reunion/graduation)	20.9%
Fine dining	18.6%
Water activities, such as a boat ride, swimming etc.	17.8%
Historical sightseeing	14.2%
Rural sightseeing	14.1%
Outlet shopping	12.8%
Casino/gambling	10.4%
Biking or other outdoor activities	10.1%
Other attraction	9.4%
Enjoy interesting architecture	9.1%
Amusement/theme park	7.7%
Nightlife/Nightclubs	7.3%
Zoo/aquarium	7.0%
A city tour	6.7%
Festival/fair	6.4%
Performing arts (inc. music, theater)	5.8%
Attending a sports event	5.8%
Antiquing	5.3%
Art museum	4.2%
Other museum	4.0%
Golf	3.6%
Wineries	3.3%
Technical/science museum	3.0%
Artisan studios & shops	2.8%
Health spa/retreat	1.5%
Production tours (factory tours)	1.0%
Orchards & U-Picks	1.0%
Farm/dairy tours	0.8%

Predictably, when people were asked to indicate which activities caused them to choose their destination or motivated their trip, the findings were different. The biggest motivator was a social or family event – this does not include all those who traveled to visit friends or relatives and did not participate in other activities. Other popular motivators included parks and natural areas, shopping, water activities, gambling and city sightseeing. Perhaps most interesting is the fragmentation of motivators, which highlights that people have lots of options to choose from when they travel and can select what is most appealing to them. While they may say that they are taking a trip to have fun or get away, specific activities help them achieve those goals.

Activities	Overall
Social or family event (inc. wedding/ reunion/graduation)	18.4%
Enjoy parks and natural areas	9.8%
Shopping	9.2%
Water activities, e.g., boat ride, swimming etc.	9.0%
Casino/gambling	6.9%
City/urban sightseeing	6.2%
Other Attraction	5.9%
Fine dining	5.4%
Historical sightseeing	5.1%
Rural sightseeing	4.8%
Amusement/theme park	4.5%
Attending a sports event	4.3%
Biking or other outdoor activities	3.9%
Outlet shopping	3.6%
Performing arts (inc. music, theater)	3.6%
Nightlife/Nightclubs	3.1%
Zoo/aquarium	3.0%
Festival/fair	2.8%
Golf	1.8%
Enjoy interesting architecture	1.5%
Antiquing	1.2%
Art museum	1.2%
Other museum	1.2%
Wineries	1.1%
A city tour	1.0%
Technical/science museum	0.9%
Health spa/retreat	0.7%
Orchards and U-Picks	0.3%
Artisan studios and shops	0.2%
Production tours (factory tours)	0.2%
Farm/dairy tours	0.1%

Many of these activities are motivate in only a minor way. Few people took a trip for a farm or dairy tour, or even to visit a winery. In many of these cases, other motivators may have been primary – or it may be that a cluster of activities represented motivation for a specific destination or trip.

To assess this issue, statistical procedures were used to identify groups of activities which were most likely to occur together, and to provide a way to characterize trips. The goal was to better understand the various types of trips so that Indiana could consider what products and packages would be most motivating – and the potential to attract visitors based on different options. The research identified those things which were key motivators and identified eleven (11) specific trip types. In some cases, the type of trip represents a very small audience – though specific activities motivated this trip. The following highlights the different types and a description of each one follows.

Types of Trips	Total
VFR	30.5%
Mandatory	24.9%
Outdoor	14.0%
Enrichment	8.8%
Gambling	5.9%
Shopping	4.9%
Amusement park	4.1%
Rural	2.1%
Event	2.0%
Golf	1.5%
Adult Getaway	1.2%

VFR – this is the most prevalent trip type, with over 30% of the trips motivated by a desire to visit friends or relatives. Many of these trips included other activities, involved paid accommodations and represented substantial visitor spending, but they will be difficult to target and motivate.

Mandatory Activities – the motivation for these trips is a specific activity that people need to attend. It might be family-related (wedding, reunion, holiday) or it might relate to a sports tournament or event, or even a business meeting. Again, oftentimes these trips include other activities, such as when people combine business trips with leisure travel, but in these cases the destination is defined by the event. There is some limited ability to influence these trips – for example reunions area good target, and making the destination seem interesting will convince people to extend business trips. However, generally, these are not the type of trips that can be targeted – or where product makes a difference.

> **Outdoor trips** – many trips included outdoor activities, but for some this was a key motivation. These trips were motivated by wanting to enjoy the outdoors or specific outdoor activities such as boating, swimming or biking. Many of these trips included camping or resorts. Overall, 14% of the trips were classified as Outdoor trips.
>
> **Enrichment trips** – one of the more interesting types of trips combines various activities, but seems to be motivated by a desire for enrichment. Many of these trips were to cities, but they could have been rural. There was a high level of visitation to museums, historical sites and other cultural attractions. This type of trip represented about 9% of the trips reported.
>
> **Gambling** – one key motivator for travelers is gambling. In many cases, people indicated that their destination and motivation was a specific casino. It is interesting to

note that it seems that the motivation was gambling, and preferences for specific casinos could drive the destination selection. These represented 6% of the trips.

Shopping – while many people shop when they are on a leisure trip, about 5% of the trips were motivated by this activity. The patterns of behavior were different for this trip type and could include outlet and antique shopping.

Amusement parks – as might be expected, another key motivator was visiting an amusement park. While this motivated only about 4% of the trips – for some this was their destination and reason for travel. Of course, these trips were much more likely to include children.

Event trips – these are similar to mandatory trips in that a specific event was the reason for travel, but these were not mandatory activities. Instead some trips were motivated by the desire to visit a festival, a concert or other event. While the location of the event determined the destination, a state can develop activities which will attract this type of trip. These represented 2% of all trips.

Golf – one of the goals of this research was to specifically explore golf trips. This was found to be a motivation, although it accounted for only 1.5% of the trips. The motivation for this type of trip was clear, but it will also be useful to understand more specifics of the trip and the decision process.

Rural trips – these have some similarity to outdoor trips, but they were not nearly as active. A key ingredient is rural sightseeing, and many involved camping. They can involve a number of activities including gambling, outlet shopping and historical sites. They seemed to be about getting out in the country and doing whatever was available, rather than focused on a specific activity. They may have been motivated more by a desire to get up and go. These represented only 2% of the trips.

Adult getaways – these trips were a small segment of all trips (1%) but were interesting in that they were generally adult-only trips and often included friends and traveling alone. Key activities included wineries, spas and historical sites. These seemed motivated by a desire to get away from it all and relax.

It will be important to explore these trip types in greater detail, and extensive information on each one follows. However, it is interesting to provide a context for these evaluations by considering the prevalence of the various trips types overall, and in a competitive context. The survey gathered information about trips taken among people in Indiana and the surrounding states – but people could have traveled anywhere within a day's drive. Therefore, the overall evaluation of trips includes the total of trips they were taken where Indiana could be competitive. However, it is also interesting to understand what type of trips they took within the region (OH, MI, IL, and KY) and what type of trips they took when visiting Indiana specifically.

The profile of trips overall is similar to the profile for Midwest trips, with the only noteworthy difference being that more of the Midwest trips were VFR. However, the profile of Indiana trips is quite different. Fewer of the Indiana trips were VFR and mandatory. This suggests that more of the trips to Indiana were leisure trips which could be influenced. There are also some major differences in the types of trips that came to the state – mainly an above average number of Gambling, Shopping, Rural and Event trips. In fact, after VFR and Mandatory, the most prevalent trip type was Gambling.

Types of Trips	Total	Midwest	Indiana
VFR	30.5%	32.1%	27.0%
Mandatory	24.9%	25.2%	22.3%
Outdoor	14.0%	13.5%	10.5%
Enrichment	8.8%	8.4%	6.0%
Gambling	5.9%	6.2%	**15.4%**
Shopping	4.9%	4.4%	**5.2%**
Amusement park	4.1%	3.9%	4.2%
Rural	2.1%	1.9%	**4.1%**
Event	2.0%	2.3%	**3.0%**
Golf	1.5%	1.0%	1.3%
Adult Getaway	1.2%	1.2%	0.9%

Another way to consider these trips is to look at those which can be influenced. While IOTD can do little to attract VFR or mandatory trips – this is not true of all other trip types. The other nine (9) trip types should be the focus of development efforts, so it helps to see the relative prevalence of these types.

Types of Trips	Total	Midwest	Indiana
Outdoor	31.5%	31.5%	20.8%
Enrichment	19.8%	19.6%	11.9%
Gambling	13.2%	14.5%	30.4%
Shopping	10.9%	10.3%	10.2%
Amusement park	9.1%	9.1%	8.3%
Rural	4.8%	4.4%	8.1%
Event	4.5%	5.4%	5.9%
Golf	3.3%	2.3%	2.6%
Adult getaway	2.8%	2.8%	1.8%

This highlights the differences in the current trip profile for Indiana and other Midwest states. While Outdoor trips were key in the Midwest, Indiana attracted a much lower percentage. For Indiana, the leading type of influence-able trip related to Gambling. The other category where Indiana attracted an above average percentage of trips was Rural trips. Another interesting gap is that Indiana attracted fewer Enrichment trips, which also seem to provide good opportunities for growth. These differences and gaps can be opportunities for Indiana from both a marketing and development standpoint and can help guide the implementation of the strategic plan. However, a more detailed review of travel and the trip types is in order.

TRAVEL PATTERNS

Having defined these various trip types, it is important to explore the specifics and identify the segments that might provide good opportunities for product development. However, first a review of trips in general and to Indiana will provide a context for evaluating the various segments. While Indiana receives information from the Shifflet Study regarding trips, these data have more in-depth exploration of motivations and details of specific types of trips.

Travel was still quite seasonal, with almost half the trips occurring during the summer months, and few occurring during winter. Trips tended to be 2.8 days long, although those to Indiana averaged only 2.1 days.

Month of Travel	All Trips	Indiana
Spring	28.9%	30.5%
Summer	47.5%	45.1%
Fall	12.2%	12.4%
Winter	11.4%	12.0%
Trip duration days	2.8	2.1

Many of the trips were regional in nature, with about 45% made to Indiana and nearby states. The most popular other states were Florida, Tennessee and Nevada. The positive news is that much of the travel was nearby –meaning that Indiana will be working to attract people who otherwise would be visiting Michigan, Ohio, Illinois or Kentucky.

Trips Taken to…

Michigan	14.7%
Ohio	11.4%
Illinois	9.7%
Indiana	8.9%
Florida	8.7%
Kentucky	5.0%
Wisconsin	3.9%
Tennessee	3.7%
Nevada	3.1%
New York	2.8%
Pennsylvania	2.6%
California	2.5%
Missouri	2.2%

While two-thirds of the trips included a spouse/significant other, only about one-third of trips included children, most especially younger children. While there is a lot of discussion regarding multi-generational trips, few included grandchildren. The pattern for Indiana trips was fairly similar to trips overall, although fewer older children and grandchildren and more friends and lone travelers visited.

Travel Party Composition	All Trips	Indiana
Spouse/significant other	65.6%	62.7%
Child(ren): age 0 – 12	19.8%	20.2%
Child(ren): age 13+	16.8%	13.1%
Grandchild(ren)	3.2%	1.6%
Other Family	16.1%	13.3%
Friends	13.8%	16.3%
I traveled alone	10.8%	13.2%
Trips with kids	33.2%	31.7%

For trips in general, mid-priced accommodations and private residences were equally popular, and represented over 70% of the accommodations used. Low priced properties and campgrounds account for another 18%, with higher priced properties, resorts and B&B's garnering the remainder. The pattern was similar for Indiana, although there was a higher use of campgrounds and significantly less usage of private homes. There were probably two reasons for the lower use of private homes and these relate to the lower percentage of VFR trips. First, Indiana has a lower population than many surrounding states – which means there are fewer people to visit. Plus, in any VFR trip people choose who makes the trip and where they travel. People from Indiana may be more likely to choose to travel elsewhere to visit relatives.

Lodging	All Trips	Indiana
High priced hotel/motel	6.8%	7.9%
Mid priced hotel/motel	35.3%	36.4%
Low priced hotel/motel	9.9%	12.2%
Bed & Breakfast / Inn	2.7%	3.8%
Campground	7.8%	11.3%
Resort	5.2%	1.2%
Home of family or friend	35.2%	29.2%

Clearly, people enjoyed lots of different activities, generally reporting an average of 3 per trip. Shopping, the most popular, was followed by parks and natural areas and city/urban sightseeing. Note also that the activities reported on Indiana trips were somewhat different, as Indiana visitors were less likely to participate in many activities including shopping and city/urban sightseeing. They were more likely to gamble, go to festival/fairs, sporting events and farm/dairy tours. This table shows the percentage of participation and an index which compares Indiana trips to trips in general. Here, the activities which were more or less popular can be seen.

Activities	Overall	IN	Index
Shopping	32.1%	22.6%	70
Enjoy parks and natural areas	25.6%	22.5%	88
City/urban sightseeing	22.2%	14.6%	66
Social or family event (inc. wedding /reunion/graduation)	20.9%	19.4%	93
Fine dining	18.6%	15.8%	85
Water activities, .e.g., boat ride, swimming etc.	17.8%	11.7%	66
Historical sightseeing	14.2%	11.4%	80
Rural sightseeing	14.1%	15.7%	111
Outlet shopping	12.8%	8.6%	67
Casino/gambling	10.4%	16.1%	155
Biking or other outdoor activities	10.1%	9.1%	90
Other attraction	9.4%	6.9%	73
Enjoy interesting architecture	9.1%	6.3%	69
Amusement/theme park	7.7%	6.3%	82
Nightlife/Nightclubs	7.3%	2.9%	40
Zoo/aquarium	7.0%	4.9%	70
A city tour	6.7%	2.6%	39
Festival/fair	6.4%	7.5%	117
Performing arts (inc. music, theater)	5.8%	3.1%	53
Attending a sports event	5.8%	6.9%	119
Antiquing	5.3%	5.4%	102
Art museum	4.2%	3.2%	76
Other museum	4.0%	3.2%	80
Golf	3.6%	3.1%	86
Wineries	3.3%	2.2%	67
Technical/science museum	3.0%	1.4%	47
Artisan studios and shops	2.8%	2.8%	100
Health spa/retreat	1.5%	0.8%	53
Production tours (factory tours)	1.0%	0.4%	40
Orchards and U-Picks	1.0%	0.0%	0
Farm/dairy tours	0.8%	1.6%	200

Perhaps the finding which should cause the most concern for Indiana is that the average expenditures on trips were much lower. In part due to shorter trips, but also on a per-day basis, Indiana trips did not generate the same level of expenditures. This suggests that IOTD should consider product development which will attract trips that generate higher levels of spending

Expenditures	All Trips	Indiana
Spent in total on trip	$459	$319
Per day	$166	$152

The survey also reviewed familiarity with several Midwest cities, and linked familiarity to interest in future visitation. Respondents indicated the highest familiarity and interest in Chicago, followed by several other cities. There is a strong link between familiarity and visitation – although in some cases familiarity reduces interest (Detroit, for example). There was a fair degree of interest in visiting several Indiana cities, with Indianapolis being the most popular followed by Brown County, South Bend, Ft. Wayne and Evansville.

Destination	Familiarity	Visitation
Chicago	68%	54%
Cincinnati	48%	35%
Detroit	46%	29%
Indianapolis	42%	34%
Louisville	40%	28%
Columbus	38%	33%
Brown County	25%	22%
South Bend	24%	14%
Ft. Wayne	22%	13%
Evansville	17%	11%
Newport, KY	12%	14%
Berea, KY	10%	8%

Finally, it is helpful to review the demographic profile of those who took the trips. This will be especially useful in considering specific trip types. Predictably, the profile for travelers in general was fairly generic and reflective of the population. The key differences were that travelers tended to be a bit more educated and to earn higher household incomes. With any type of travel survey, the fact that women are the primary decision-makers results in a high percentage of female respondents.

The profile of those who reported a trip to Indiana was not significantly different. Perhaps the most noteworthy finding is that although people reported lower levels of spending on their Indiana trips, their household income level was the same. This is certainly an issue worth exploring related to various trip types and suggests that Indiana can increase the economic impact from travel simply by changing the mix of trips that it attracts.

Demographics	**All Trips**	**Indiana**
Married	65.7%	67.4%
Divorced	13.9%	14.8%
Widowed	4.4%	4.3%
Single/never married	16.0%	13.6%
High school or less	16.2%	18.8%
Some college/technical school	41.7%	34.7%
College graduate	30.1%	32.2%
Post graduate degree	12.0%	14.2%
Income	$61,677	$62,011
People in household	2.8	2.8
Children under 18	0.8	0.8
Age	46.5	47.7
Female	76.1%	74.5%
Male	23.9%	25.5%

Following is a description of each trip type including the demographic profile of people who took that type of trip. These details are compared to trips to Indiana to provide a way of exploring the best options for product development.

OUTDOOR TRIPS

Outdoor trips were generally motivated by the desire to enjoy the outdoors or specific activities such as boating, swimming or hiking. While these trips included other activities, the motivation was to enjoy the outdoors and nature.

Among the trips that IOTD can influence, Outdoor trips represent the most popular generally – although not for Indiana. While 32% of all influence-able trips are classified as Outdoor trips, only 21% of the Indiana trips fell into this category. This is an area where the state could attract additional visitation. Given that this is a popular trip type, it certainly has potential to increase visitation. However, it will be important to assess the type of product or packages that would have to be developed, and whether this is the most desirable trip type to attract.

State	Outdoor
MI	24.1%
OH	13.7%
KY	11.0%
WI	9.8%
IN	8.8%
IL	6.2%

It is useful to know where people traveled for Outdoor trips. As might be expected, Michigan was the most popular state for this trip type. Indiana ranked below most of the surrounding states – although it did better than Illinois. Part of this may be the outdoor product available. Both Michigan and Ohio have a much greater shoreline along the Great Lakes, and Michigan offers lots of other outdoor activities.

Predictably, the trips that were motivated by Outdoor activities were much more likely to occur in the summer, with spring being the second most popular season. From this standpoint, this may not be the most desirable trip type, as it might make sense to attract visitation during other seasons. However, the average length of an Outdoor trip was 3.7 days, which makes them quite appealing. (in the following, the specific trip types are compared to the average Indiana trip. The sample size for many of the trip types was not large enough to allow comparisons of the overall trip type to those trips taken in Indiana)

Month of Travel	Outdoor	All Indiana Trips
Spring	20.4%	30.5%
Summer	58.8%	45.1%
Fall	14.9%	12.4%
Winter	5.9%	12.0%
Trip duration	3.7	2.1

Outdoor trips were definitely family-oriented, as most included a spouse and half included children. There were more grandchildren and other family members on these trips, with fewer friends and lone travelers. Outdoor trips were simply a family affair.

Travel Party Composition	Outdoor	All Indiana Trips
Spouse/significant other	78.7%	62.7%
Child(ren): age 0 – 12	35.1%	20.2%
Child(ren): age 13+	21.5%	13.1%
Grandchild(ren)	6.3%	1.6%
Other Family	20.0%	13.3%
Friends	15.6%	16.3%
I traveled alone	3.5%	13.2%
Trips with kids	50.6%	31.7%

The types of accommodation used are not surprising – lots of camping and resorts, and fewer people using private homes or hotel/motel properties.

Lodging	Outdoor	All Indiana Trips
High priced hotel/motel	6.4%	7.9%
Mid priced hotel/motel	26.1%	36.4%
Low priced hotel/motel	6.1%	12.2%
Bed & Breakfast / Inn	3.6%	3.8%
Campground	26.7%	11.3%
Resort	14.8%	1.2%
Home of family or friend	19.8%	29.2%

Since these are the motivators of these trips, most included enjoying parks and natural areas, water activities and biking. Other popular activities on this type of trip included shopping and rural sightseeing. Interestingly, many also included city/urban sightseeing as well as visiting historical sites. This suggests that more rural areas near cities can capitalize on this type of trip and put together appealing packages.

Activities	Outdoor
Enjoy parks and natural areas	68.2%
Water activities, such as a boat ride, swimming etc.	63.3%
Biking or other outdoor activities	36.6%
Rural sightseeing	28.1%
Shopping	25.8%
City/urban sightseeing	15.0%
Historical sightseeing	14.3%
Fine dining	13.4%
Outlet shopping	13.1%
Other attraction	12.6%
Zoo/aquarium	7.2%
Nightlife/Nightclubs	7.0%
Amusement/theme park	6.8%
Festival/fair	6.8%
Antiquing	6.5%
Artisan studios and shops	5.3%
Enjoy interesting architecture	3.5%
Wineries	3.5%
A city tour	3.4%
Health spa/retreat	2.8%
Orchards and U-Picks	2.7%
Golf	2.6%
Casino/gambling	2.4%
Performing arts (inc. music, theater)	2.3%
Social or family event (inc. wedding/ reunion/graduation)	2.3%
Technical/science museum	2.1%
Other museum	1.4%
Art museum	0.4%
Production tours (factory tours)	0.4%
Attending a sports event	0.2%
Farm/dairy tours	0.2%

One surprising fact about Outdoor trips is that they generated strong per trip and per-day expenditures. While many may have camped, overall these trips include healthy spending levels. Plus, since they tend to be longer than average, this compounds the positive impact.

Expenditures	Outdoor	All Indiana Trips
Spent in total on trip	$647	$319
Per day	$173	$152

Demographically, the family aspect of this type of visitor was also evident. They were more likely to be married and to report larger family sizes. Their household incomes were also higher and they were a bit younger.

Demographics	Outdoor
Married	77.5%
Divorced	13.1%
Widowed	1.9%
Single/never married	7.5%
High school or less	12.6%
Some college/technical school	42.4%
College graduate	31.4%
Post graduate degree	13.7%
Income	$64,762
People in household	3.4
Children under 18	1.0
Age	46.4
Female	72.2%
Male	27.8%

ENRICHMENT TRIPS

Enrichment trips involved a number of activities, but motivators included urban experiences, historical sites and visitation to museums of all types. These trips seemed to be motivated by a desire to learn more and enrich the lives of those on the trip. These trips represented 20% of all influence-able trips reported, but just 12% of the trips to Indiana.

Illinois and Ohio were the most popular destinations. Many of the Enrichment trips involved city travel, so Chicago and the cities in Ohio attracted this type of travel. Other popular destinations were Michigan, New York and Tennessee –Indiana came in 6th.

State	Enrichment
IL	23.0%
OH	18.0%
MI	9.8%
NY	9.7%
IN	8.1%
TN	6.7%

It is interesting to note that these trips were also more seasonal in nature, with well over half taking place during the summer and fewer in the spring and fall. Since these trips likely included children, it may be that the seasonality was based on their schedules and availability. These trips were longer than an average Indiana trip, at 2.8 days. Again, this was an appealing feature, although the concentration of summer travel was less appealing.

Month of Travel	Enrichment	All Indiana Trips
Spring	21.6%	30.5%
Summer	55.4%	45.1%
Fall	9.3%	12.4%
Winter	13.7%	12.0%
Trip duration	2.8	2.1

While less than a third of the Indiana trips included children, this was not the case for Enrichment trips. Many of these included children – both younger kids, and older children. These trips were less likely to include friends or lone travelers.

Travel Party Composition	Enrichment	All Indiana Trips
Spouse/significant other	66.5%	62.7%
Child(ren): age 0 – 12	27.4%	20.2%
Child(ren): age 13+	23.0%	13.1%
Grandchild(ren)	2.2%	1.6%
Other Family	15.8%	13.3%
Friends	11.2%	16.3%
I traveled alone	7.4%	13.2%
Trips with kids	44.9%	31.7%

These trips were concentrated in hotel/motel properties, with high usage of high-priced and mid-priced properties. These trips did not include camping and were less likely to include staying with family or friends. This is another feature that might make these trips appealing for Indiana.

Lodging	Enrichment	All Indiana Trips
High priced hotel/motel	14.3%	7.9%
Mid priced hotel/motel	48.1%	36.4%
Low priced hotel/motel	11.3%	12.2%
Bed & Breakfast/Inn	4.1%	3.8%
Campground	1.0%	11.3%
Resort	2.0%	1.2%
Home of family or friend	21.8%	29.2%

One feature of this type of trip was the variety of activities included. People who took these types of trips reported an average of 4.5 activities, compared to just 2.9 for trips in general. These trips were more likely to be urban and included city sightseeing, but they were more likely to include rural sightseeing. Shopping and fine dining were important, as were historical sites, museums, zoos, aquariums and natural areas.

Activities	**Enrichment**
City/urban sightseeing	65.5%
Shopping	41.0%
Zoo/aquarium	36.3%
Historical sightseeing	32.0%
Fine dining	31.9%
Enjoy interesting architecture	29.5%
Enjoy parks and natural areas	24.8%
Art museum	20.9%
Technical/science museum	17.7%
A city tour	17.6%
Other museum	15.9%
Water activities, e.g., boat ride, swimming etc.	15.4%
Rural sightseeing	14.1%
Outlet shopping	10.1%
Amusement/theme park	9.8%
Nightlife/Nightclubs	9.4%
Casino/gambling	9.0%
Other attraction	8.6%
Performing arts (inc. music, theater)	8.0%
Biking or other outdoor activities	3.9%
Artisan studios and shops	3.9%
Festival/fair	3.7%
Wineries	3.7%
Attending a sports event	3.5%
Antiquing	3.2%
Golf	2.3%
Farm/dairy tours	1.6%
Production tours (factory tours)	0.8%
Social or family event	0.7%
Orchards and U-Picks	0.4%
Health spa/retreat	0.0%

When on these trips, expenditures were fairly high, about 20% above the average trip expenditures. Specifically these trips engendered higher expenditures than Indiana trips.

Expenditures	Enrichment	Indiana
Spent in total on trip	$556	$319
Per day	$199	$152

The demographic profile of people taking Enrichment trips was not very different from those who had visited Indiana. The only notable difference is that these people tended to be younger and there were more females – which was probably more mom's putting together these trips for their kids. This suggests that current visitors would take more Enrichment trips in Indiana if marketed and packaged properly.

Demographics	Enrichment
Married	62.9%
Divorced	17.6%
Widowed	3.4%
Single/never married	16.1%
High school or less	21.7%
Some college/technical school	27.2%
College graduate	40.9%
Post graduate degree	10.1%
Income	$63,302
People in household	3.0
Children under 18	1.0
Age	41.2
Female	80.4%
Male	19.6%

GAMBLING

Gambling was a key motivator for trips to Indiana. While only about 13% of the influence-able trips to the Midwest were motivated by this activity, 30% of the Indiana trips were gambling. Since gambling options are scarce in many surrounding states, Indiana has become a prime destination for this activity. Therefore, IOTD needs a clear understanding of these types of trips and how they contribute to tourism in the state.

One benefit of gambling trips is that they are much less seasonal than other types of travel. While the largest percentage still occurs in the summer, there was strong representation for this type of travel in all seasons, with fall being the least popular. A negative aspect of this trip type is that it tends to be quite short, averaging only 1.8 days. In fact, the prevalence of this type of trip to Indiana is part of the reason that the average trip to Indiana is so short.

Month of Travel	Gambling	All Indiana Trips
Spring	34.2%	30.5%
Summer	38.3%	45.1%
Fall	10.3%	12.4%
Winter	17.1%	12.0%
Trip duration	1.8	2.1

As might be expected, these trips seldom included children, and when they did, they were likely to be older children. Few people traveled alone to gamble and most traveled with a spouse or significant other.

Travel Party Composition	Gambling	Indiana
Spouse/significant other	73.5%	62.7%
Child(ren): age 0 – 12	2.2%	20.2%
Child(ren): age 13+	7.4%	13.1%
Grandchild(ren)	0.0%	1.6%
Other Family	10.5%	13.3%
Friends	16.3%	16.3%
I traveled alone	5.3%	13.2%
Trips with kids	7.4%	31.7%

One positive feature of these trips was the high level of hotel/motel use, including many who stayed in high-priced properties. Almost none stayed with family and friends, and there was little camping involved in a Gambling trip.

Lodging	Gambling	All Indiana Trips
High priced hotel/motel	22.6%	7.9%
Mid priced hotel/motel	55.0%	36.4%
Low priced hotel/motel	10.3%	12.2%
Bed & Breakfast / Inn	1.7%	3.8%
Campground	1.5%	11.3%
Resort	8.4%	1.2%
Home of family or friend	3.7%	29.2%

The key motivator for this type of trip was gambling, but that does not mean that it was the only activity. Because of these short trips, they only included an average of 2.6 activities (the lowest for any trip type). Besides gambling, the most popular other activities included shopping and fine dining. However, there was also some level of sightseeing (both urban and rural) included. Generally, these trips were fairly limited, but certainly promoting shopping and dining packages could help extend these trips and spread the economic impact.

Activities	**Gambling**
Casino/gambling	100.0%
Shopping	22.8%
Fine dining	20.6%
City/urban sightseeing	17.5%
Enjoy parks and natural areas	13.5%
Outlet shopping	13.5%
Historical sightseeing	12.3%
Rural sightseeing	11.2%
Festival/fair	11.0%
Wineries	6.4%
Nightlife/Nightclubs	5.0%
Enjoy interesting architecture	4.9%
Water activities, .e.g., boat ride, swimming etc.	4.9%
Antiquing	4.4%
Golf	4.4%
A city tour	3.9%
Art museum	2.6%
Amusement/theme park	1.7%
Artisan studios and shops	1.7%
Other attraction	1.7%
Other museum	0.4%
Technical/science museum	0.0%
Zoo/aquarium	0.0%
Biking or other outdoor activities	0.0%
Health spa/retreat	0.0%
Attending a sports event	0.0%
Performing arts (inc. music, theater)	0.0%
Social or family event (inc. wedding/	0.0%
Orchards and U-Picks	0.0%
Farm/dairy tours	0.0%
Production tours (factory tours)	0.0%

While the Gambling trips were short, they were high in terms of expenditures. In fact, those who gambled reported expenditures twice as high as other Indiana trips – both overall and on a per-day basis.

Expenditures	Gambling	Indiana
Spent in total on trip	$603	$319
Per day	$336	$152

There are distinct differences in the profile for people who took this type of trip. They tended to be older, with significantly less education (75% less than a college degree), and were more likely to be divorced or widowed. At the same time, the average household income is similar to that for other trips.

Demographics	Gambling
Married	67.5%
Divorced	17.3%
Widowed	7.3%
Single/never married	7.9%
High school or less	25.5%
Some college/technical school	49.3%
College graduate	20.6%
Post graduate degree	4.6%
Income	$63,608
People in household	2.7
Children under 18	0.5
Age	50.7
Female	75.9%
Male	24.1%

AMUSEMENT PARKS

Trips that were motivated by visiting an amusement park represented about 9% of the influence-able visits, which is comparable to trips to the Midwest and overall. While Indiana does not have as many amusement parks as some of its competitors, the state garners its share of these trips (8%). As might be expected, Ohio garnered the largest share, followed by Tennessee. Indiana actually did fairly well at third, followed by Illinois.

State	Amusement Parks
OH	36.5%
TN	13.6%
IN	12.2%
IL	10.6%
WI	5.7%
PA	5.0%
FL	4.5%

These trips, of course, were highly seasonal, with three-quarters occurring during the summer months. The average trip was 2.7 days, which is longer than the typical Indiana trip.

Month of Travel	Amusement Parks	All Indiana Trips
Spring	11.5%	30.5%
Summer	74.0%	45.1%
Fall	13.0%	12.4%
Winter	1.5%	12.0%
Trip duration	2.7	2.1

Of course, the majority of these trips included children, with a higher percentage including younger children. This is also an area where grandparents took their grandchildren. Interestingly, the travel party often included other family and friends.

Travel Party Composition	Amusement Parks	All Indiana Trips
Spouse/significant other	64.0%	62.7%
Child(ren): age 0 – 12	43.6%	20.2%
Child(ren): age 13+	30.0%	13.1%
Grandchild(ren)	7.8%	1.6%
Other Family	22.2%	13.3%
Friends	22.4%	16.3%
I traveled alone	2.1%	13.2%
Trips with kids	61.9%	31.7%

Hotel/motel properties were the most popular option – especially mid and low-priced properties, but many used resorts and campgrounds. Few reported staying with family and friends when on this type of trip.

Lodging	Amusement Parks	All Indiana Trips
High priced hotel/motel	1.3%	7.9%
Mid priced hotel/motel	42.1%	36.4%
Low priced hotel/motel	18.9%	12.2%
Bed & Breakfast / Inn	0.0%	3.8%
Campground	16.2%	11.3%
Resort	13.4%	1.2%
Home of family or friend	11.3%	29.2%

These trips were motivated by a visit to an amusement park, which tends to be the key activity. However, on average travelers reported two other activities. Shopping was popular, as was enjoying nature or water activities. Another activity that was more popular on these types of trips was attending performances – which may be part of the amusement park experience.

Activities	Amusement Parks
Amusement/theme park	99.3%
Shopping	27.3%
Outlet shopping	24.4%
Enjoy parks and natural areas	22.9%
Water activities, e.g., boat ride, swimming etc.	21.4%
Zoo/aquarium	13.2%
Other attraction	12.9%
City/urban sightseeing	10.2%
Fine dining	8.8%
Performing arts (inc. music, theater)	8.8%
Festival/fair	7.8%
A city tour	6.5%
Biking or other outdoor activities	5.9%
Rural sightseeing	5.9%
Art museum	5.0%
Antiquing	5.0%
Production tours (factory tours)	5.0%
Historical sightseeing	4.9%
Technical/science museum	2.5%
Enjoy interesting architecture	2.1%
Nightlife/Nightclubs	2.1%
Other museum	0.7%
Golf	0.7%
Social or family event (inc. wedding/ reunion, graduation)	0.7%
Artisan studios and shops	0.7%
Health spa/retreat	0.0%
Casino/gambling	0.0%
Attending a sports event	0.0%
Wineries	0.0%
Orchards and U-Picks	0.0%
Farm/dairy tours	0.0%

Probably due to the larger travel party size and the cost of amusement parks, the average trip expenditures were quite high. The overall expenditures were over $500, and per-day spending topped $200.

Expenditures	Amusement Parks	All Indiana Trips
Spent in total on trip	$547	$319
Per day	$203	$152

The group that took this type of trip was younger, families. Their education and income levels were similar to other travelers, but interestingly there were more men in this group.

Demographics	Amusement Parks
Married	75.8%
Divorced	11.6%
Widowed	0.7%
Single/never married	11.9%
High school or less	14.8%
Some college/technical school	36.1%
College graduate	36.5%
Post graduate degree	12.6%
Income	$63,023
People in household	2.9
Children under 18	1.0
Age	42.5
Female	69.9%
Male	30.1%

SHOPPING

While many people reported shopping as a popular activity, trips that were motivated by shopping represented 10% of the influence-able trips to Indiana, which is about the same percentage for the Midwest as a whole. This was a mix of general shopping and outlet shopping. The current prevalence of this type of trip suggests that Indiana has product that is appealing and it might make sense to develop and promote packages aimed to attract this type of trip. The distribution of shopping trips was quite even – with several states sharing this trip type. It is likely that people shopped closer to home and chose places which were convenient. It may be that there are few places that offer something really different in a shopping experience.

State	Shopping
OH	14.9%
MI	14.0%
IL	13.8%
IN	12.6%
TN	12.1%
WI	12.0%

The seasonality of shopping trips was similar to that for other travel, with the largest concentration in the summer, followed by spring. The average trip was 2.3 days, which is slightly longer than Indiana trips in general.

Month of Travel	Shopping	All Indiana Trips
Spring	31.2%	30.5%
Summer	44.2%	45.1%
Fall	13.9%	12.4%
Winter	10.8%	12.0%
Trip duration	2.3	2.1

Shopping trips tended to include spouses and were less likely to include children. Interestingly, the prevalence of people who traveled with friends for this type of travel was below average. It may be that these were women-only trips – but that is not evident from the data. Instead, it seemed that couples enjoyed these shopping motivated trips.

Travel Party Composition	Shopping	All Indiana Trips
Spouse/significant other	70.0%	62.7%
Child(ren): age 0 – 12	9.1%	20.2%
Child(ren): age 13+	5.4%	13.1%
Grandchild(ren)	2.9%	1.6%
Other Family	12.0%	13.3%
Friends	14.9%	16.3%
I traveled alone	7.4%	13.2%
Trips with kids	17.4%	31.7%

The majority of these trips used hotel/motel accommodations, with a higher incidence of high and mid-priced properties. Camping and staying with friends and family were not usually features of this trip type.

Lodging	Shopping	All Indiana Trips
High priced hotel/motel	9.9%	7.9%
Mid priced hotel/motel	48.5%	36.4%
Low priced hotel/motel	14.2%	12.2%
Bed & Breakfast / Inn	1.1%	3.8%
Campground	4.4%	11.3%
Resort	2.1%	1.2%
Home of family or friend	20.3%	29.2%

While shopping motivated the trip, people reported an average of 3.4 activities, which is above average. These trips seemed to be more urban in nature as the specific activities that were most likely to be included were fine dining, urban sightseeing, enjoying interesting architecture and nightclubs/nightlife.

Activities	Shopping
Shopping	85.3%
Outlet shopping	44.2%
City/urban sightseeing	33.6%
Fine dining	28.5%
Rural sightseeing	14.9%
Enjoy parks and natural areas	14.3%
Nightlife/Nightclubs	12.3%
Enjoy interesting architecture	12.0%
Performing arts (inc. music, theater)	8.6%
Festival/fair	8.1%
Casino/gambling	7.4%
Antiquing	7.4%
Historical sightseeing	6.9%
Other attraction	6.7%
Amusement/theme park	6.3%
A city tour	5.9%
Water activities, .e.g., boat ride, swimming etc.	5.2%
Health spa/retreat	4.7%
Farm/dairy tours	3.9%
Artisan studios and shops	3.6%
Zoo/aquarium	3.4%
Other museum	2.6%
Biking or other outdoor activities	2.6%
Attending a sports event	2.1%
Orchards and U-Picks	2.1%
Technical/science museum	1.8%
Wineries	1.8%
Art museum	1.3%
Golf	0.0%
Social or family event	0.0%
Production tours (factory tours)	0.0%

Expenditures on these trips were high, suggesting that people were buying as they shopped. The per-day expenditures were higher than any other trip type except for gambling, and the overall expenditures are almost $650.

Expenditures	**Shopping**	**All Indiana Trips**
Spent in total on trip	$645	$319
Per day	$279	$152

The demographic profile shows some interesting features. Given that these were generally couples trips, it's not surprising that most people were married, although a significant number were single. The audience for this trip type was younger and female, with below average levels of income and education.

Demographics	**Shopping**
Married	72.8%
Divorced	7.8%
Widowed	2.6%
Single/never married	16.8%
High school or less	20.3%
Some college/technical school	43.1%
College graduate	30.1%
Post graduate degree	6.5%
Income	$58,669
People in household	2.6
Children under 18	0.7
Age	45.3
Female	82.0%
Male	18.0%

RURAL

As noted, rural trips were somewhat similar to outdoor trips, but they were not nearly as active. A key ingredient was rural sightseeing and many involved camping. They involved a number of activities including gambling, outlet shopping and historical sites. They seemed to be about getting out in the country and doing whatever was available, rather than being focused on a specific activity. They may have been motivated more by a desire to get up and go. These represented only 5% of the influence-able trips nationally, but 8% of the trips to Indiana. Michigan garnered the largest share of these trips – but Indiana came in second. Interestingly, Wisconsin and Iowa were the other popular options – suggesting that Indiana may have a good opportunity with this trip type, at least with nearby states.

State	Rural
MI	25.8%
IN	22.9%
WI	18.3%
IA	9.6%

Since rural trips are outdoor-oriented, they were more likely to occur during the summer months, although they were also prevalent in the fall. As less active outdoor trips, these probably included many fall foliage trips. These trips were longer than the average Indiana trip and could be a good target.

Month of Travel	Rural	All Indiana Trips
Spring	20.8%	30.5%
Summer	49.8%	45.1%
Fall	20.5%	12.4%
Winter	8.9%	12.0%
Trip duration	3.7	2.1

The vast majority of these trips included couples and only about one-quarter was made with children. When children were included, they were almost always younger kids. The travel party sometimes included other family, but seldom friends.

Travel Party Composition	Rural	All Indiana Trips
Spouse/significant other	81.4%	62.7%
Child(ren): age 0 - 12	21.2%	20.2%
Child(ren): age 13+	4.8%	13.1%
Grandchild(ren)	0.0%	1.6%
Other Family	14.1%	13.3%
Friends	4.8%	16.3%
I traveled alone	5.7%	13.2%
Trips with kids	26.0%	31.7%

The most popular type of accommodation was staying with friends and family, but perhaps due to the location (rural areas) people tended to use low-priced hotel/motel properties and camping. Usage of bed & breakfast properties was also a bit above average. There was no usage of high-priced properties, and below average usage of mid-priced accommodations.

Lodging	Rural	All Indiana Trips
High priced hotel/motel	0.0%	7.9%
Mid priced hotel/motel	24.0%	36.4%
Low priced hotel/motel	20.2%	12.2%
Bed & Breakfast / Inn	4.8%	3.8%
Campground	19.0%	11.3%
Resort	0.0%	1.2%
Home of family or friend	36.8%	29.2%

Rural sightseeing was the main goal of this trip, but several activities were also popular, including parks and natural areas, historical sightseeing, outlet shopping, fine dining and artisan studio tours. Interestingly, a significantly number of people also reported gambling as part of this type of trip. Finally, some activities were reported by few people – but were much more prevalent for this trip type, including farm tours, orchards and u-pick farms.

Activities	Rural
Rural sightseeing	91.1%
Enjoy parks and natural areas	37.1%
Historical sightseeing	27.4%
Outlet shopping	26.6%
Antiquing	19.7%
Shopping	19.7%
Fine dining	19.7%
Casino/gambling	19.0%
Other attraction	13.7%
Enjoy interesting architecture	12.1%
Water activities, e.g., boat ride, swimming etc.	12.1%
Artisan studios and shops	11.2%
Festival/fair	10.5%
Biking or other outdoor activities	8.2%
A city tour	6.4%
Zoo/aquarium	6.0%
Amusement/theme park	4.8%
Attending a sports event	4.8%
Farm/dairy tours	4.8%
Production tours (factory tours)	4.8%
City/urban sightseeing	4.1%
Orchards and U-Picks	4.1%
Performing arts (inc. music, theater)	1.7%
Golf	1.2%
Art museum	0.0%
Technical/science museum	0.0%
Other museum	0.0%
Health spa/retreat	0.0%
Nightlife/Nightclubs	0.0%
Social or family event (inc. wedding,/ reunion/graduation)	0.0%
Wineries	0.0%

Because these trips were longer than average, the total trip expenditures were fairly high, but the per-day expenditures were low. These trips represented lower expenditures because they usually involved lower-priced accommodations and activities.

Expenditures	**Rural**	**All Indiana Trips**
Spent in total on trip	$365	$319
Per day	$119	$152

There are several noteworthy points regarding the demographic profile of those who took this type of trip. These travelers claimed lower levels of income and education, were slightly older and less likely to include children. Women were more likely to report taking this type of trip.

Demographics	**Rural**
Married	72.5%
Divorced	12.2%
Widowed	6.4%
Single/never married	8.9%
High school or less	19.7%
Some college/technical school	42.9%
College graduate	21.8%
Post graduate degree	15.6%
Income	$54,988
People in household	2.4
Children under 18	0.4
Age	48.4
Female	83.9%
Male	16.1%

EVENT

Event trips were similar to mandatory trips in that a specific event was the reason for travel, but these are not mandatory activities. Instead, some trips were motivated by the desire to visit a festival, a concert or other event. While the location of the event determined the destination, a state could develop activities to attract this type of trip. These trips represented 4.5% of all influence-able trips, and 6% of the Indiana trips. In terms of where the “events” were, Michigan as definitely the most popular option. Indiana was second, although well behind Michigan – and Ohio was third.

State	Event
MI	31.8%
IN	17.7%
OH	14.1%
IL	7.7%
NC	7.7%

As with most of the trip types summer was the most popular season, but many event trips happened in the fall. Interestingly, fewer took place in the spring. These trips were longer than the average Indiana trip, at 2.8 nights.

Month of Travel	Event	All Indiana Trips
Spring	21.0%	30.5%
Summer	42.9%	45.1%
Fall	24.9%	12.4%
Winter	11.1%	12.0%
Trip duration	2.8%	2.1%

The travel party for these trips included couples, and a third included children. In this case, it was more often older children. Additional family members were sometimes included, and an above average number of trips involved single travelers.

Travel Party Composition	Event	All Indiana Trips
Spouse/significant other	65.1%	62.7%
Child(ren): age 0 - 12	12.8%	20.2%
Child(ren): age 13+	19.4%	13.1%
Grandchild(ren)	1.3%	1.6%
Other Family	17.1%	13.3%
Friends	11.7%	16.3%
I traveled alone	17.5%	13.2%
Trips with kids	33.5%	31.7%

People traveling for events were most likely to use mid-priced hotels and motels, and there was an above average usage of campgrounds. Only a few stayed with family and friends, perhaps due to the fact that they were visiting destinations for specific events – not necessarily where friends and family live.

Lodging	Event	All Indiana Trips
High priced hotel/motel	2.6%	7.9%
Mid priced hotel/motel	49.6%	36.4%
Low priced hotel/motel	10.7%	12.2%
Bed & Breakfast / Inn	5.1%	3.8%
Campground	17.3%	11.3%
Resort	1.3%	1.2%
Home of family or friend	13.3%	29.2%

The types of events which motivated these trips are evident when activities are considered. Two-thirds of the trips included festivals and fairs and many revolved around performing arts, and other attractions. These trips were not just event-focused, as people reported an average of 3.2 activities on these trips – fewer activities than reported on many other trip types. It is noteworthy that none of these trips included gambling, although some of the casinos have used events to attract visitors. This suggests that even when visitors take advantage of the events, they are not their key motivation.

Activities	**Event**
Festival/fair	65.1%
Other attraction	41.0%
Enjoy parks and natural areas	27.9%
Shopping	23.8%
City/urban sightseeing	18.5%
Performing arts (inc. music, theater)	16.1%
Fine dining	12.5%
Biking or other outdoor activities	11.4%
Enjoy interesting architecture	10.3%
Rural sightseeing	9.6%
A city tour	9.4%
Historical sightseeing	9.4%
Production tours (factory tours)	9.4%
Water activities, such as a boat ride, swimming etc.	7.7%
Zoo/aquarium	6.4%
Amusement/theme park	6.1%
Outlet shopping	6.1%
Nightlife/Nightclubs	6.1%
Social or family event	5.1%
Antiquing	3.9%
Attending a sports event	2.6%
Artisan studios and shops	2.6%
Health spa/retreat	1.8%
Art museum	1.3%
Wineries	1.3%
Orchards and U-Picks	1.3%
Technical/science museum	0.0%
Other museum	0.0%
Casino/gambling	0.0%
Golf	0.0%
Farm/dairy tours	0.0%

As with several of the other trip types, the fact that these trips were above average in length resulted in higher trip expenditures. Yet, the per-day expenditures were a bit below average – probably due to the fact that fewer activities were part of the trip.

Expenditures	Event	All Indiana Trips
Spent in total on trip	$403	$319
Per day	$146	$152

The demographic profile of these travelers was fairly average, except that the level of education was below average and more men reported taking these trips. Family size and household income were not noteworthy, although these travelers were a bit older than average.

Demographics	Event
Married	65.4%
Divorced	18.1%
Widowed	8.7%
Single/never married	7.8%
High school or less	22.6%
Some college/technical school	45.9%
College graduate	25.1%
Post graduate degree	6.4%
Income	$63,142
People in household	2.5
Children under 18	0.6
Age	49.7
Female	63.6%
Male	36.4%

ADULT GETAWAY

Adult Getaway trips were a small segment of all trips but were interesting in that they were generally adult-only trips and often included friends and people traveling alone. These seemed motivated by a desire to get away from it all and relax. These trips were only 3% of all influence-able trips and represented less than 2% of the Indiana trips. Michigan was again the most popular destination, with Ohio and Pennsylvania next. Indiana ranked only fourth for Adult Getaway trips. This trip type is noteworthy as people reported traveling to a number of non-Midwest states for this experience.

State	Adult Getaway
MI	23.2%
OH	19.5%
PA	10.3%
IN	8.5%
WV	8.2%
IL	7.1%
NJ	7.0%
NY	7.0%

These trips are fairly long at 3.3 days, and while the majority occurs during the summer, this type of trip is also popular in the spring. Interestingly, few take place during the fall.

Month of Travel	Outdoor	All Indiana Trips
Spring	34.7%	30.5%
Summer	44.8%	45.1%
Fall	6.4%	12.4%
Winter	14.1%	12.0%
Trip duration	3.3	2.1

As noted in the definition, these trips were by nature adult-oriented, as only 2% included children. However, about one-quarter of the trips was single travelers and a significant number were with friends.

Travel Party Composition	Adult Getaway	All Indiana Trips
Spouse/significant other	62.2%	62.7%
Child(ren): age 0 - 12	2.1%	20.2%
Child(ren): age 13+	0.0%	13.1%
Grandchild(ren)	0.0%	1.6%
Other Family	2.1%	13.3%
Friends	13.4%	16.3%
I traveled alone	24.4%	13.2%
Trips with kids	2.1%	31.7%

While the most popular types of accommodations for these trips were mid and low-priced accommodations, another interesting fact about these trips is that many included the use of bed & breakfast inns. It was less common for people to stay with family or to camp.

Lodging	Adult Getaway	All Indiana Trips
High priced hotel/motel	2.1%	7.9%
Mid priced hotel/motel	39.9%	36.4%
Low priced hotel/motel	20.2%	12.2%
Bed & Breakfast / Inn	14.1%	3.8%
Campground	2.1%	11.3%
Resort	2.1%	1.2%
Home of family or friend	19.5%	29.2%

People who took these trips reported an average of 4.5 activities - one of the highest averages. Among the most popular activities were wineries, historical sightseeing, parks, antiquing and shopping. These trips were much more likely than others to include spas, city tours and museums.

Activities	Outdoor
Wineries	61.10%
Historical sightseeing	47.80%
Enjoy parks and natural areas	44.50%
Antiquing	31.80%
Shopping	24.70%
Social or family event (inc. wedding/	24.30%
City/urban sightseeing	22.50%
Biking or other outdoor activities	19.50%
Health spa/retreat	19.50%
A city tour	19.00%
Water activities, such as a boat ride, swimming etc.	17.30%
Other museum	15.20%
Enjoy interesting architecture	14.60%
Attending a sports event	14.00%
Nightlife/Nightclubs	14.00%
Festival/fair	10.30%
Outlet shopping	10.30%
Fine dining	8.50%
Amusement/theme park	8.20%
Orchards and U-Picks	7.00%
Rural sightseeing	4.30%
Artisan studios and shops	4.30%
Art museum	2.10%
Casino/gambling	2.10%
Production tours (factory tours)	2.10%
Technical/science museum	0.00%
Zoo/aquarium	0.00%
Golf	0.00%
Performing arts (inc. music, theater)	0.00%
Farm/dairy tours	0.00%
Other attraction	0.00%

The total trip expenditures for Adult Getaway trips were just over $450, which is quite a bit higher than the average Indiana trips. However, the value of these trips was based on the length of trip, as the average daily expenditures were below that level.

Expenditures	Adult Getaway	All Indiana Trips
Spent in total on trip	$464	$319
Per day	$142	$152

In many ways, the demographic profile of these travelers was similar to travelers to Indiana. These visitors were married, with an average level of income and age. The level of education among this group included few with a high school education, but a below average number claimed to have a post-graduate degree.

Demographics	Adult Getaway
Married	74.6%
Divorced	7.0%
Widowed	9.1%
Single/never married	9.2%
High school or less	2.1%
Some college/technical school	50.4%
College graduate	37.1%
Post graduate degree	10.3%
Income	$63,282
People in household	2.4
Children under 18	0.4
Age	47.8
Female	74.6%
Male	25.4%

GOLF

The last type of trip to be explored is trips motivated by golfing. The Indiana Office of Tourism Development has been exploring golf trips and therefore they were a specific focus of this research effort. In addition to the overall exploration of trips among general consumers, an additional group of participants were surveyed related to golf. These people were leads from a variety of sources, but all expressed interest in golfing. These golf leads and people who indicated that they had golfed as part of a trip were asked a series of additional questions related to golf (where noteworthy, the results between the two groups of golfers are compared).

In terms of the general trip types, golf trips represented only a small percentage of the influence-able trips overall (3.3%) and a slightly smaller percentage of trips to Indiana (2.6%). However, this group is motivated by a specific activity. As such, it is easy to target. The geographic distribution for this type of trip was quite interesting – with Wisconsin being the leader, followed by Kentucky, Florida and Michigan. For this type of trip Indiana ranked fifth – and obviously has to compete against a national audience.

State	Golf
WI	27.6%
KY	16.2%
FL	15.9%
MI	11.8%
IN	10.5%
MO	8.7%
IL	6.9%

Of course, golf trips are seasonal in nature, with summer being the most popular time. While people travel to enjoy golf in the off-season, they are most likely to take a golf trip in the summer. This works for Indiana, here the availability of this type of trip is limited seasonally, but also makes this type of trip a bit less attractive for the state. However, these trips averaged 4 nights, which means that they were longer than typical trips, which makes this an appealing trip type.

Travel of Travel	Golf	All Indiana Trips
Spring	23.4%	30.5%
Summer	55.5%	45.1%
Fall	15.2%	12.4%
Winter	6.0%	12.0%
Trip duration	3.4	2.1

While the stereotype of a golf trip often brings to mind several guys taking off on their own, three-quarters of the golf trips included spouses. At the same time, a large percentage included friends, but it would seem that in many cases couples traveled together, rather than just groups of men. These trips were not likely to include children and few were taken by single travelers.

Travel Party Composition	Golf	All Indiana Trips
Spouse/significant other	74.7%	62.7%
Child(ren): age 0 – 12	8.3%	20.2%
Child(ren): age 13+	8.0%	13.1%
Grandchild(ren)	0.0%	1.6%
Other Family	6.2%	13.3%
Friends	38.3%	16.3%
I traveled alone	0.9%	13.2%
Trips with kids	13.6%	31.7%

The most popular type of accommodation for a golf trip was mid-priced hotel/motel properties, followed by resort properties. Of course, in many parts of the country there are a plethora of golf resorts which cater to this audience. Additionally, one in five of the trips involved staying with friends and family.

Lodging	Golf	All Indiana Trips
High priced hotel/motel	0.0%	7.9%
Mid priced hotel/motel	34.4%	36.4%
Low priced hotel/motel	13.6%	12.2%
Bed & Breakfast / Inn	2.2%	3.8%
Campground	3.1%	11.3%
Resort	28.8%	1.2%
Home of family or friend	20.4%	29.2%

While golf was the main motivator of these trips, travelers reported an average of 3.8 activities as part of these trips. In addition to golf, water activities, shopping, fine dining nightlife and wineries were popular. Since couples were involved in these trips, it is likely that there is a mix of activities to satisfy differing levels of interest in golf. It is also noteworthy that among the golf leads, some traveled for other reasons. The activity levels were similar for general golf trips and those from the golf leads, although those from the golf leads tended to include more sightseeing.

Activities	Golf Trips	Golf Leads
Golf	100.00%	79.0%
Shopping	35.40%	39.0%
Fine dining	28.30%	36.4%
Water activities, e.g., boat ride, swimming etc.	23.70%	26.4%
Enjoy parks and natural areas	20.50%	17.0%
City/urban sightseeing	19.40%	14.7%
Outlet shopping	17.20%	16.3%
Wineries	13.10%	9.7%
Nightlife/Nightclubs	12.90%	10.5%
Rural sightseeing	10.20%	23.3%
Casino/gambling	9.40%	6.2%
Antiquing	8.30%	9.1%
Historical sightseeing	8.00%	12.5%
Other attraction	7.10%	4.5%
Amusement/theme park	5.40%	3.9%
Festival/fair	4.90%	3.9%
Biking or other outdoor activities	3.80%	9.2%
Art museum	3.40%	4.0%
Orchards and U-Picks	3.20%	2.3%
Other museum	2.70%	4.7%
Enjoy interesting architecture	2.70%	1.6%
Performing arts (inc. music, theater)	2.70%	3.2%
Zoo/aquarium	2.50%	9.1%
Artisan studios and shops	2.50%	4.2%
A city tour	2.20%	5.8%
Health spa/retreat	0.90%	0.8%
Production tours (factory tours)	0.70%	0.0%
Technical/science museum	0.00%	1.9%
Attending a sports event	0.00%	3.1%
Social or family event (inc. wedding/ reunion/graduation)	0.00%	4.3%
Farm/dairy tours	0.00%	0.0%

In fact the research explored the importance of some specific factors for these golf trips. Respondents rated these factors on a 5-point scale, where a higher score is better. It is noteworthy that the ratings indicate that none of these factors are very important. Activities for family members were most important overall, while fine dining was most important to those from the golf list. However, it seems that these outside activities were less important for a golf trip.

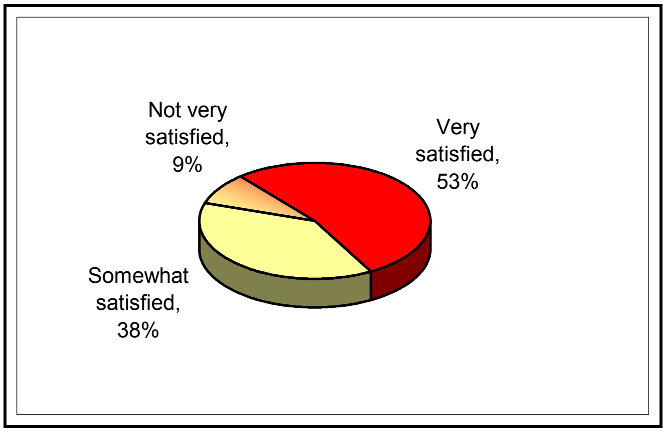
Activities	Golf List	All Golf
Activities for other family members	2.76	3.34
Fine dining	2.84	3.07
Shopping	2.78	3.05
Luxury accommodations	2.66	2.67
Nightlife/bars	2.38	2.54

One especially appealing feature of these types of trips was that a lot of money was spent – in fact, the average trip expenditures were twice those of the typical Indiana trip. In part, this is because the trips were quite a bit longer. At the same time, a part of these high expenditures were from those who visited golf resorts, and unless Indiana can offer this type of product, the impact for Indiana will probably be somewhat lower.

Expenditures	All Golf	Golf Leads	All Indiana Trips
Spent in total on trip	$746	$672	$319
Per day	$217	$198	$152

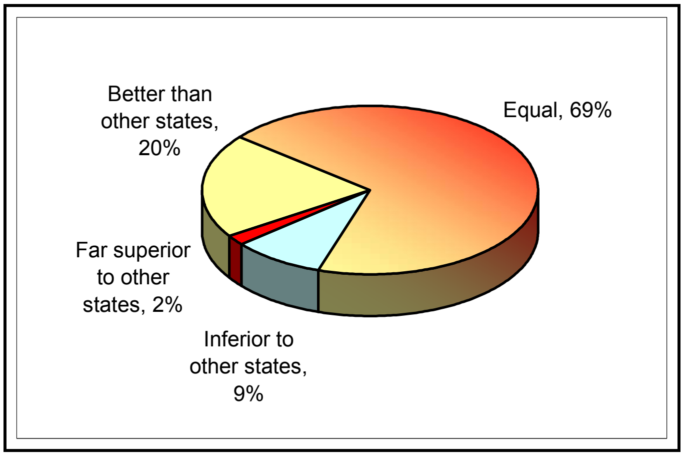
Only a small group of people have taken a recent golf trip to Indiana, but the majority was quite satisfied with the experience. This suggests that if Indiana can attract visitors for golf, they have a good opportunity to attract repeat visitation.

Satisfaction with Indiana Golf Trips



At the same time, Indiana does not have an advantage over other states. Generally, those who have golfed in Indiana consider the product similar to that of other states.

Comparison of Indiana Golf Product



The profile of those who took golf trips is quite distinctive. First, they were almost all married, and over half were college graduates. While the majority of the survey sample – and the travel decision-makers are female - those who took golf trips were mostly male. Additionally, this group had a much higher household income and was a bit older.

Demographics	All Golf	Golf Leads
Married	96.8%	100%
Divorced	0.0%	0%
Widowed	0.0%	0%
Single/never married	3.2%	0%
High school or less	8.0%	17.3%
Some college/technical school	33.9%	26.3%
College graduate	53.8%	48.9%
Post graduate degree	4.3%	7.5%
Income	$94,647	$99,922
People in household	2.7	2.6
Children under 18	0.4	0.4
Age	49.3%	51.6%
Female	28.1%	12.4%
Male	71.9%	87.6%

The research also asked about some factors that could influence the decision to take a golf trip to Indiana. Again, a 5-point scale was used. Some differences are noted between those from the golf list and the general golf travelers. Those from the golf list indicated that specific factors would have a greater impact on their decision. Specifically, both the ability to play several nationally rated courses and being less expensive could have a strong positive influence.

Among the general audience motivated by golf trips, expense could have the greatest influence. However, this group rated all three benefits fairly low, indicating that these will not have a major impact on their decision-making.

Factors	Golf List	All Golf
Ability to play several different nationally rated courses	4.11	3.54
Being closer than other comparable options	3.69	3.57
Being less expensive than comparable options	4.06	3.87

In trying to educate consumers about what Indiana offers as a golf destination, it is helpful to know what sources of information they typically use. The Web – specifically search engines are the most important source of information, followed by *Golf Digest*. *Travel & Leisure Golf* is also popular. Those from the golf list were much more likely to use the *Indiana Golf & Travel Guide* and to visit golf shows.

Sources of Information	Golf List	All Golf
Web search engine	56%	47%
Golf Digest	45%	26%
Direct Mail	27%	19%
Travel and Leisure Golf	18%	13%
Indiana Golf and Travel Guide	36%	13%
Other	15%	12%
Grand Rapids golf show	30%	9%
Chicago golf show	6%	7%
Novi golf show	24%	7%
Cincinnati golf show	22%	7%
Specific golf Websites	3%	1%

EVALUATING THE TRIP TYPES

The research gathered data which can be used in targeting packages and product to each of the trip types. For example, the demographic profiles can be used to select media while the list of activities can be used to develop the most meaningful packages. The details about seasonality will help in determining when to offer packages, and details of the travel parties will help assess whether to include children in any package options. This information can be used to target each different trip type and therefore attract more of these types of trips. However, given limited resources, it might make sense to consider a narrower focus – at least at first. The following provides a summary table of the trip types to identify those with the greatest potential for Indiana.

It shows some key issues:

- Size of segment – the more trips there are in a segment, the greater the overall potential.
- Seasonality – this shows the % of trips that are not in the summer. Targeting trips that take place in other seasons will help fill in gaps and bring travel when areas need more business.
- Duration of trip – generally getting people to stay longer is better.
- Expenditures – this is linked to the duration of the trip, also shows which segments offer the greatest potential.

	Out-door	Enrich-ment	Gamble	Amuse Park	Shop	Golf	Rural	Event	Adult Getaway
Size of Segment	31.5%	19.8%	13.2%	10.9%	9.1%	4.8%	4.5%	3.3%	2.8%
Seasonality	41.2	44.6	61.7	26.0	55.8	44.5	50.2	57.1	55.2
Duration of trip	3.7	2.8	1.8	2.7	2.3	3.4	3.1	2.8	3.3
Expenditure	$647	$556	$603	$547	$645	$746	$365	$403	$464

IOTD may want to include other factors in its analysis, but this suggests that Outdoor trips should be a focus of future efforts. They are the biggest trip type and represent the longest trips, with high levels of spending. In addition, Indiana does not receive a high percentage of these trips – which means there is room for growth. Of course, Indiana's ability to provide a desirable product for this type of trip may be the issue. As such, targeting this type of trip may be more difficult. The Enrichment trips also offer a good target and may "fit" better with Indiana's product mix.

The other options depend more upon IOTD's chosen strategy – some are less seasonal, some represent more expenditures, etc. None of the other segments are as large or have as many positive characteristics as Outdoor trips. However, several of the smaller trip types may be appealing as they can be easily targeted. For example, Golf trips are generally fairly long and generate high expenditures – and they can be marketed using targeted options. Given this overview of motivations and the landscape, it now is useful to consider consumer reactions to the product ideas tested in this research. These ideas can be used to develop tactics to increase specific trip types to Indiana.

NEW PRODUCT DEVELOPMENT

This evaluation of trips and their motivations provides much insight into packaging and developing activities and attractions which will generate travel. In addition, the IOTD wants to support more product development. As such, the survey also explored consumers' reactions to existing / potential attractions. The respondents were presented with 18 options and asked to rate their likelihood to visit such attractions. Consumers tend to over-estimate their actual usage. So, SMARI has developed a formula for creating more realistic projections. The projection assumes that 80% of those who say they are "very likely" and 20% of those who are "somewhat likely" will actually follow through.

These projections highlight the most popular options – small towns and main streets, and local restaurants as destinations. These two options have the broadest appeal and are likely to attract significant additional travel. Plus, these are certainly product options that Indiana already has. All that will be necessary is to package and promote existing small towns and unique restaurants.

The next group includes shopping, art and rural attractions – country markets, artisan tours of studios at state parks and shopping for artisan and agricultural products. These products will take a bit more development and packaging but Indiana can fairly easily provide these product areas.

Popular Product Ideas

	Total
Small towns & main streets	**25.8%**
Local restaurants as destination	**24.9%**
Country market	18.2%
Artisan tours at state parks	16.5%
Shopping for artisan/agricultural products	16.1%
Artisan studio tours	15.4%

Niche Product Ideas

Ecotourism	14.7%
Wine trail	13.9%
Hiking trail	13.8%
Manufacturing & production tours	12.2%
Downloadable walking/driving tours	9.5%
Bicycle trail	9.1%
Horse trail	8.8%
Farm/dairy tours	8.8%
Golf trail	7.6%
Bird watching sanctuaries	7.3%
Automobile plant tours	7.3%
Extreme sports/venues	6.8%

The research explored whether there were significant differences among the various segments. It makes sense that depending upon the motivation of the trip, people might prefer different options. There are some differences, but they are certainly not clear-cut – as the same people take different types of trips and therefore might include different activities depending upon the type of trip they are planning. While generally the same options are popular with all segments, there are some differences worth considering.

People who are taking Mandatory and VFR trips choose small town/main streets and local restaurants as destinations. Those taking mandatory trips are more interested in many of the options, suggesting that it may be possible to promote activities that would convince people taking this type of trip to stay longer and spend more money. Those who are visiting friends and relatives show below average interest in all these activities.

Activities	Mandatory	VFR
Small towns & main streets	97	88
Local restaurants as destination	105	86
Country market	97	86
Artisan tours at state parks	118	77
Shopping for artisan/ag products	113	79
Artisan studio tours	127	91
Ecotourism	108	74
Wine trail	92	74
Hiking trail	89	61
Manufacturing & production tours	89	77
Downloadable walking/driving tours	120	75
Bicycle trail	92	71
Horse trail	125	88
Farm/dairy tours	105	82
Golf trail	81	55
Bird watching sanctuaries	117	71
Automobile plant tours	69	69
Extreme sports/venues	135	98

When the more focused trip types are considered, areas of interest can be developed and used in the packaging of trips to attract these visitors.

Outdoor Trips – the appealing activities here relate to nature and include hiking, bicycle and horse trails as well as bird watching sanctuaries. Artisan studio tours and ecotourism are also popular options.

Enrichment trips – these visitors want more activities and indicate above average interest in all activities. The good news is that most any product development that Indiana undertakes will increase the appeal to this group.

Gambling – as other research indicates, gamblers like to gamble. It will be difficult to attract them for other activities and it may not make sense to make any effort with this group.

Amusement Parks – this group has some surprising preferences. The local restaurant is the most appealing product for this group. However, they express above average interest in several activities, including hiking trails, manufacturing and production tours, downloadable walking/driving tours, automobile plant tours and horse trails. These certainly don't "fit" with amusement parks, but may represent the types of activities that people want to share with their children, and since kids are the focus of an amusement park trip, this may be the link.

Shopping – the results from the shopping segment are also interesting. Local restaurants are the most interesting product for this group also, although they show strong interest in the small towns and main streets. They are not as interested in shopping for art and agricultural products. However, they are interested in hiking trails.

Activities	Outdoor	Enrichment	Gambling	Amusement Parks	Shopping
Small towns & main streets	101	119	84	87	86
Local restaurants as destination	91	104	95	110	107
Country market	98	112	99	78	82
Artisan tours at state parks	110	115	45	95	85
Shopping for artisan/ag products	105	113	91	77	80
Artisan studio tours	147	146	80	60	64
Ecotourism	138	112	60	92	85
Wine trail	59	109	90	103	100
Hiking trail	190	149	31	139	117
Manufacturing & production tours	107	133	74	113	105
Downloadable walking/driving tours	109	134	53	122	108
Bicycle trail	174	156	49	99	89
Horse trail	161	177	61	139	124
Farm/dairy tours	104	188	72	70	71
Golf trail	40	56	89	54	61
Bird watching sanctuaries	156	144	62	90	85
Automobile plant tours	76	128	51	131	115
Extreme sports/venues	196	188	58	92	85

Golf trips – this group stays true to its motivations and wants to see a golf trail. Interestingly they also express above average interest in other types of trails – both wine and bicycle trails. They also are interested in small towns and country markets.

Rural trips – the product ideas that this group shows interest in include bird watching sanctuaries, ecotourism, and farm and dairy tours.

Event trips – this group is one that shows interest in automobile and manufacturing-related tours as well as downloadable walking and driving tours. This group is also interested in artisan tours at state parks.

Adult Getaways – this group is small, but has a wide range of interests. They participate in lots of activities on their trips and show above average interest in many of the product options. They are not interested in the outdoor trails or extreme sports – but they like the small towns, arts and manufacturing-related tours.

Activities	Golf	Rural	Event	Adult Getaways
Small towns & main streets	102	88	89	159
Local restaurants as destination	89	107	61	145
Country market	118	89	46	195
Artisan tours at state parks	51	119	131	155
Shopping for artisan/ag products	136	97	82	127
Artisan studio tours	95	88	92	110
Ecotourism	82	136	79	134
Wine trail	152	97	43	181
Hiking trail	60	101	85	77
Manufacturing & production tours	62	56	143	140
Downloadable walking/driving tours	63	99	123	94
Bicycle trail	107	121	103	38
Horse trail	77	43	60	46
Farm/dairy tours	52	134	78	145
Golf trail	556	38	64	5
Bird watching sanctuaries	41	181	38	115
Automobile plant tours	74	73	147	166
Extreme sports/venues	75	22	69	81

Obviously, IOTD can use these preferences to develop packages or products that appeal to people who take specific types of trips. However, more generally it also makes sense to consider how this information might be used to generate repeat visitation or attract new visitors. In the research, people were asked how many times they had traveled to Indiana in the past two years. With this information, consumers were separated into three groups – those who had not visited in the past two years, those who had visited one or two times, and those who were frequent visitors (visited 4 or more times).

While it would be helpful if there were specific activities or products that were more appealing to those who had not visited, basically, the rank of preferences is almost the same regardless of past visitation. Those who have visited the state are generally more interested in these various products, even though they were not presented as Indiana options.

Products	**No Visits**	**Few Visits**	**Frequent Visits**
Small towns and main streets	94	103	103
Local restaurant as a destination	93	103	104
Country markets	93	103	104
Shopping for artisan or agricultural products	92	104	104
Artisan fairs at state parks	93	104	103
Artisan studio tours	91	105	105
Ecotourism	94	103	102
Manufacturing and production tours	94	101	105
Hiking trails	94	104	102
Wine trails	94	106	100
Downloadable walking and/or driving tours	87	107	106
Farm/dairy tours	94	103	103
Automobile plant tours	92	101	107
Bird watching sanctuaries	96	103	101
Bicycle trails	98	105	97
Horse trails	100	104	97
Extreme sporting events/venues	96	105	99
Golf trails	98	105	97

RECOMMENDATIONS

This research provides a plethora of information that IOTD can use in developing the tactics to implement its strategic plan for product development. In fact, all this information may be overwhelming. To effectively use this information, IOTD needs to implement a process to bring together this information with other intelligence and to then apply strategic and tactical goals for decision-making.

The following is a multi-step process that IOTD could use that should provide the insight and decisions necessary to move forward:

1. This information focuses on the details of trip types – what people do and where they go. For Indiana, a critical step is to conduct a SWOT (strengths, weaknesses, opportunities and threats) assessment for each trip type. The goal would be for Indiana to assess its current product relating to this trip type and to identify key competitors, their attributes and Indiana's current points of differentiation. The goal of this step should be to identify where Indiana is well positioned to compete for specific trip types and where additional development is necessary.
2. Use this information and the SWOT analysis to begin developing packages and marketing what already exists in Indiana. This information can help with itineraries on the Website, choices for advertising and other promotional efforts. IOTD can immediately begin to refine its marketing efforts based on trip types and key motivations.
3. Conduct a review of the trip types in light of all the data and prioritize trip types for promotion and development. IOTD might select specific trip types where Indiana is already strong and focus marketing efforts in those areas, while also identifying trip types for future development. This information could then be used in creating the development program and in guiding communities in their development efforts.
4. Once target trip types were identified for development efforts the next step would be to identify the type of attractions and development that would support expansion of this type of visitation. The goal would be to begin to identify and develop attractions that would differentiate Indiana and give it an advantage over the competition.
5. Using all this information, the final step would be to develop a detailed plan to support the necessary development to attract increased visitation from these trip types. This would probably be a combination of marketing and development steps and would include both short and long-term goals.

APPENDIX

Indiana Tourism Product Development Survey

#993123
August, 2006

Thank you for visiting our travel survey. Your opinions are valuable to us!! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:
For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
If you need to go back to the preceding question to change your response, click on the Previous button.
For some questions, you will need to scroll down to respond to all the questions on a screen.

To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- ☐ You
- ☐ Your spouse/partner (TERMINATE)
- ☐ Jointly with your spouse/partner
- ☐ Someone else (TERMINATE)

S2. Do you normally take at least one leisure trip per year involving an overnight stay?

- ☐ Yes
- ☐ No → TERMINATE

Think for a moment about any leisure travel that you took within the U.S. in the last year. This would be any trips that:
occurred in the last 12 months;
involved at least one overnight stay;
was NOT for business; and
was NOT exclusively to visit a friend or relative.

S3. How many of these trips have you taken?

- ☐ NONE → TERMINATE
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6 or more

1. Please list your trips below (ask 1 per screen – forcing to answer)

	Month of trip (drop down with months – Jan thru Dec)	Length of trip (# of nights) 1-2-3-4-5-6-7 or more	Destination	State	Within a day's drive
Trip 1					
Trip 2					
Trip 3					
Trip 4					
Trip 5					
Trip 6					

[USE DROP DOWN WITH ALPHEBETICAL STATE LIST AT END OF QR]

TERMINATE ANYONE WITH:
NO TRIPS
ONLY TRIPS THAT ARE MORE THAN A DAY'S DRIVE

In order to better understand how people make travel decisions, please provide some more specific information about some of these trips. (Example – DESTINATION is "Grand Canyon" & you were in the STATE of "Wyoming")

ASK Q 2-11 ABOUT UP TO TWO TRIPS. CHOOSE RANDOMLY, BUT ONLY INCLUDE TRIPS THAT WERE WITHIN A DAY'S DRIVE.

2. Thinking about the trip you took in [INSERT MONTH]……
When people choose trips there are some different ways that they think about their trip and the make the trip decisions. For some, they have a destination in mind and they plan their trip to visit that destination. For others, the trip is motivated by wanting to participate in a specific activity or visit a specific attraction – such as "I want to go golfing or I want to go to the exhibit at the Chicago Art Museum." Finally some people are looking for a specific type of experience such as a cruise, or a romantic getaway. What was the main reason you choose the destination for this trip? Please be as specific as possible ________________

3. What activities did you participate in on the trip? (select all that apply)

- ☐ City/urban sightseeing
- ☐ A city tour
- ☐ Historical sightseeing
- ☐ Art museum
- ☐ Technical/science museum
- ☐ Other museum (SPECIFY)_____________
- ☐ Zoo / aquarium
- ☐ Amusement/theme park
- ☐ Enjoy interesting architecture
- ☐ Biking or other outdoor activities
- ☐ Enjoy parks and natural areas
- ☐ Water activities, such as a boat ride, swimming etc.
- ☐ Health spa/retreat
- ☐ Casino / gambling
- ☐ Festival/fair

- Antiquing
- Outlet shopping
- Shopping
- Golf
- Attending a sports event
- Nightlife/Nightclubs
- Fine dining
- Performing arts (inc. music, theater)
- Social or family event (inc. wedding, reunion, graduation)
- Wineries
- Orchards and U-Picks
- Farm/dairy tours
- Rural sightseeing
- Production tours (factory tours)
- Artisan studios and shops
- Other attraction: ____
- NONE

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

4. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip. You may choose up to 3.

5. With whom did you travel?

- Spouse / significant other
- Child(ren): age 0–12
- Child(ren): age 13+
- Grandchild(ren)
- Other Family
- Friends
- I traveled alone

6. Did you stay at a…

- High priced hotel / motel
- Mid priced hotel / motel
- Low priced hotel / motel
- Bed & Breakfast / Inn
- Campground
- Resort
- Home of family or friend

7. Using a scale of 1 to 5 where 5 is a great deal and 1 is not at all, how much did the cost influence the specific decision you made about each of the following?

[ ] accommodations _____
[ ] length of stay _____
[ ] mode of travel _____
[ ] Activities on the trip _____
[ ] destination you chose _____

8. Thinking about your decision to travel to [INSERT DESTINATION] in [INSERT MONTH], how important were each of these decisions in planning. Using a 5 point scale where 5 is very important and 1 is not at all important... How important was ....

When to go	______
Where to go	______
How long to stay	______
What accommodations to use	______
With who to travel	______
What to do	______

9. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your [INSERT MONTH] trip to [DESTINATION]. Please estimate how much you spent in total on this trip? $__________

REPEAT FOR SECOND TRIP IF AVAILABLE
Now I'd like to ask you some questions about travel and your image of some Midwest destinations.

10. Which of the following cities have you visited for a leisure trip in the past 5 years. (INCLUDING CITIES YOU MAY HAVE ALREADY MENTIONED)

- ☐ Berea, KY
- ☐ Chicago, IL
- ☐ Cincinnati, OH
- ☐ Columbus, OH
- ☐ Detroit, MI
- ☐ Evansville, IN
- ☐ Fort Wayne, IN
- ☐ Indianapolis, IN
- ☐ Louisville, KY
- ☐ Nashville, IN/Brown County
- ☐ Newport, KY
- ☐ South Bend, IN

11. FOR EACH CITY MENTIONED ASK: How many times have you visited this city for a leisure trip in the past 5 years?

12 OR CITIES NOT VISITED: How familiar are you with each of the following cities, in terms of what they have to offer as a place for a leisure trip?

	Not at all Familiar	Not Very Familiar	Somewhat Familiar	Very Familiar
Berea, KY				
Chicago, IL				
Cincinnati, OH				
Columbus, OH				
Detroit, MI				
Evansville, IN				
Fort Wayne, IN				
Indianapolis, IN				
Louisville, KY				
Nashville, IN/Brown County				
Newport, KY				
South Bend, IN				

13. How likely are you to visit each of the following cities for a leisure trip in the next year?

	Not at all Likely	Not Very Likely	Somewhat Likely	Very Likely
Berea, KY				
Chicago, IL				
Cincinnati, OH				
Columbus, OH				
Detroit, MI				
Evansville, IN				
Fort Wayne, IN				
Indianapolis, IN				
Louisville, KY				
Nashville, IN/Brown County				
Newport, KY				
South Bend, IN				

14. Now I'd like you to review some potential new attractions that could be developed in the Midwest. How likely would you be to visit a city, or extend your stay for an extra night if this attraction was developed?

	Not Likely	Not Very Likely	Somewhat Likely	Very Likely
Artisan studio tours. *In this type of tour, visitors could interact with individual artists – from glass blowers to furniture makers – and watch them work. The artists' products would also be available for sale at the studios.*				
Shopping for artisan or agricultural producuts. *Visitors would have the opporutnity to purchase products unique to an area. This would include not only art such as pottery and quilts but also agricultural products such as wine and salsa.*				
Artisan fairs at state parks. *These events would allow visitors the opportunity to watch multiple artists and purchase their work at a single location.*				
Local restaurant as a destination. *This includes restaurants that have been a mainstay of an area for years, features local foods or are independently owned.*				
Wine trail. *Offers wine tastings and/or tours at vineyards across the state.*				
Farm/dairy tours. *Visitors have the opportunity to see production facilities of agricultural products.*				
Country markets. *Examples include farmers' markets, U-picks and orchards.*				
Small towns and Main Streets. *Visiting small communities charming downtowns and unique shops and restaurants.*				
Ecotourism. *Offers natural features in an environmentally and sustainable way.*				
Bird watching sanctuaries				
Golf trail. *The ability to play multiple courses in an area based on a particular theme.*				
Bicycle Trail.				
Hiking Trail				
Horse Trail				

Extreme sporting events/venues. *Visitors could participate in extreme sports such as rock climbing, sky diving or caving.*				
Automobile plant tours.				
Manufacturing and production tours. *Visitors have an opportunity to take a guided tour of facilities. This can include anything from lawn mower manufacturers to a chocolate company.*				
Downloadable walking and/or driving tours. *Tours of communities would be made available online for use on iPods and other MP3 players.*				

IF Q14_b = Somewhat Likely or Very Likely, ask 14a, if not, skip to Q15
14a. You indicated you would be interested in shopping for artisan or agricultural products. From which type of retail facility would you be more likely to purchase these types of products?

1. A store along a major highway
2. A state park inn
3. A visitor center
4. An outlet shopping mall

15. How many times have you traveled in Indiana in the past two years?
    - ☐ NONE
    - ☐ 1
    - ☐ 2
    - ☐ 3
    - ☐ 4 or more

16. How likely are you to travel in Indiana in the next two years?

    - ☐ Very Likely
    - ☐ Somewhat likely
    - ☐ Somewhat unlikely
    - ☐ Not Very likely

The following questions are for classification purposes only, and will help us understand different groups of people.

17. What is your marital status?

    1…Married
    2…Divorced
    3…Widowed
    4…Single/never married

18. Are you female or male?
    1…Female
    2…Male

19. Including yourself, how many people are currently living in your household?
    ENTER NUMBER: ____________ [if Q37 = 1 skip to Q39]

20. How many children under the age of 18 do you have living at home?: ___________

21. Which of the following categories best represents the last grade of school you completed?

1…High school or less
2…Some college/technical school
3…College graduate
4…Post graduate degree

22. Which of the following categories best represents the total annual income for your household before taxes?

2…under $39,999
3…$40,000 to $59,999
4…$60,000 to $79,999
5…$80,000 to $99,999
6…$100,000 to $120,000
7…More than $120,000

23. What is your age? ENTER AGE: _______

24. What is your ZIP CODE ______