COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

HOT SPRINGS NATIONAL PARK ARKANSAS

2022

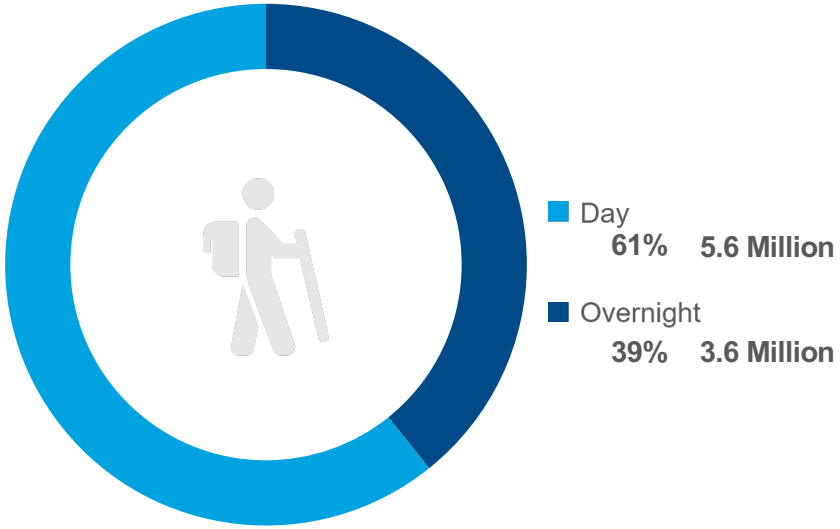
Size of the Hot Springs Travel Market

Base: 2022 Person-Trips

Total Size of Hot Springs 2022 Domestic Travel Market

Total Person-Trips

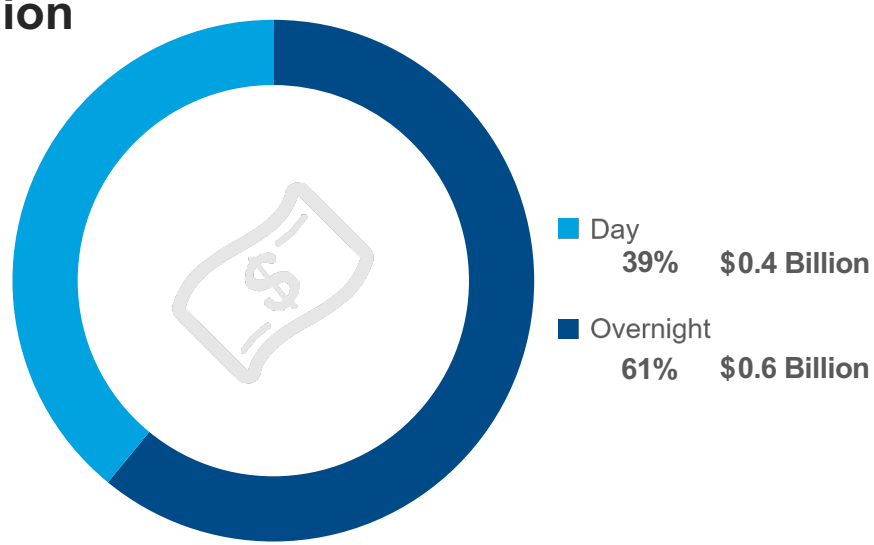
9.3 Million



Total Expenditures for Hot Springs 2022 Domestic Travel Market

Total Spending

$ 1.0 Billion



COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Overnight Visitation

HOT SPRINGS NATIONAL PARK ARKANSAS

2022

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- An **overnight trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- This report provides an overview for Hot Springs' domestic tourism business in 2022.

Methodology

Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Hot Springs, the following sample was achieved in 2022:

Overnight Base Size

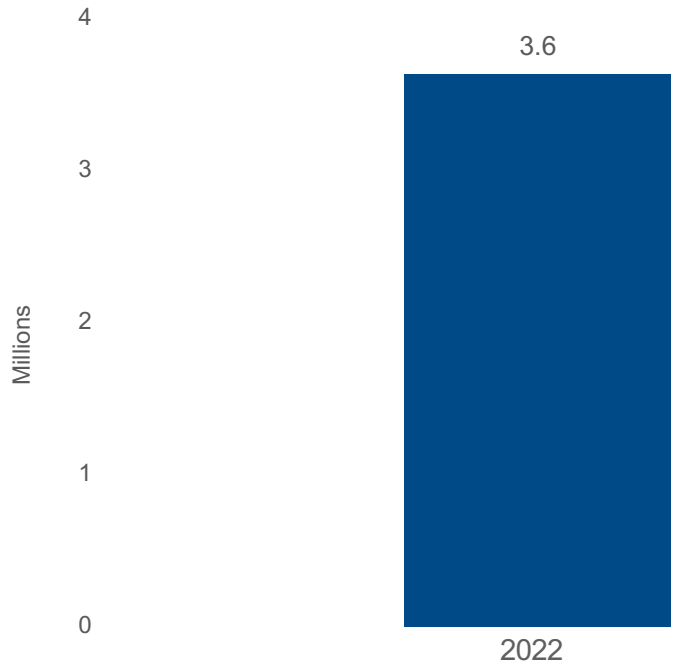
559

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Size and Structure of Hot Springs' Domestic Travel Market

Base: 2022 Overnight Person-Trips

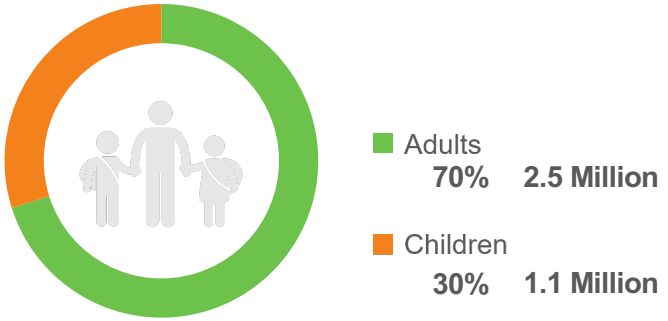
Overnight Trips to Hot Springs



Size of Hot Springs' Overnight Travel Market - Adults vs. Children

Total Overnight Person-Trips

3.6 Million



Past Visitation to Hot Springs

71% of overnight travelers to Hot Springs are repeat visitors

52% of overnight travelers to Hot Springs had visited before in the past 12 months

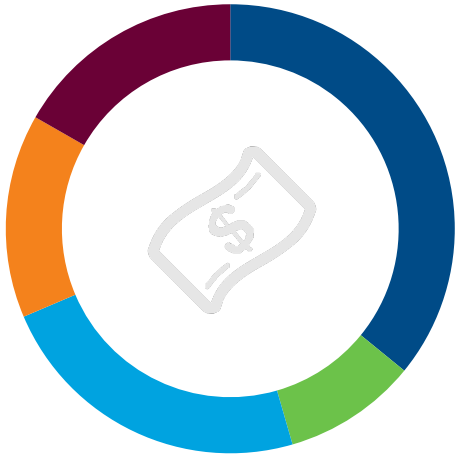
Hot Springs' Overnight Trip Expenditures

Base: 2022 Overnight Person-Trips

Domestic Overnight Expenditures - by Sector

Total Spending

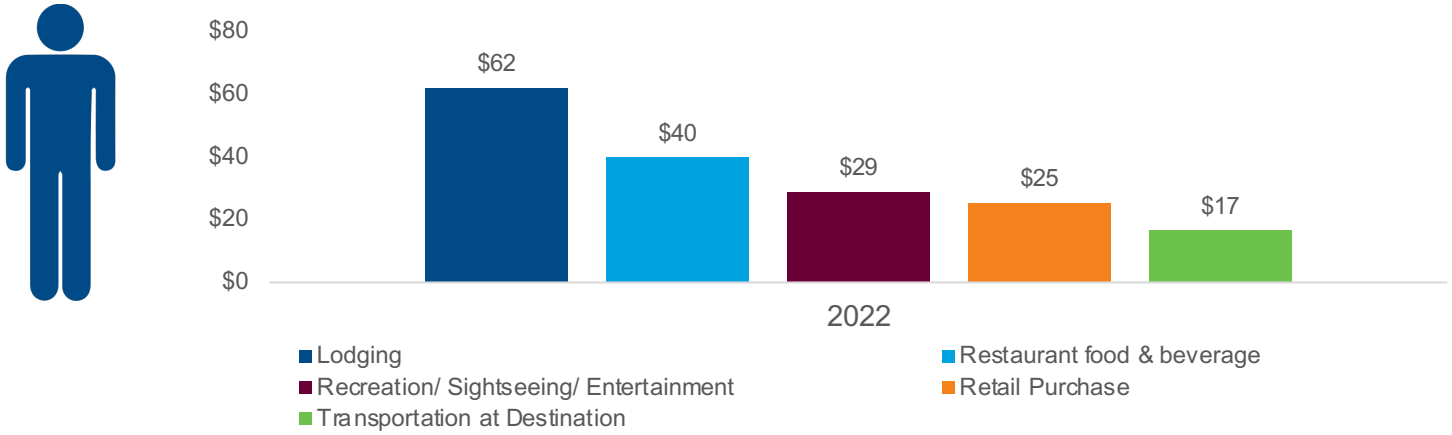
$ 0.627 Billion



Lodging	36%	$225 Million
Transportation at Destination	10%	$60 Million
Restaurant Food & Beverage	23%	$145 Million
Retail Purchase	15%	$92 Million
Recreation/Entertainment	17%	$105 Million

Average Per Person Per Trip Expenditures on Domestic Overnight Trips - by Sector

Average Per Person Per Trip: $173



Average Per Person Per Trip:

Leisure $160

Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Main Purpose of Trip

34% Visiting friends/ relatives

15% Touring

14% Outdoors

7% Special event

7% City trip

4% Casino

3% Resort

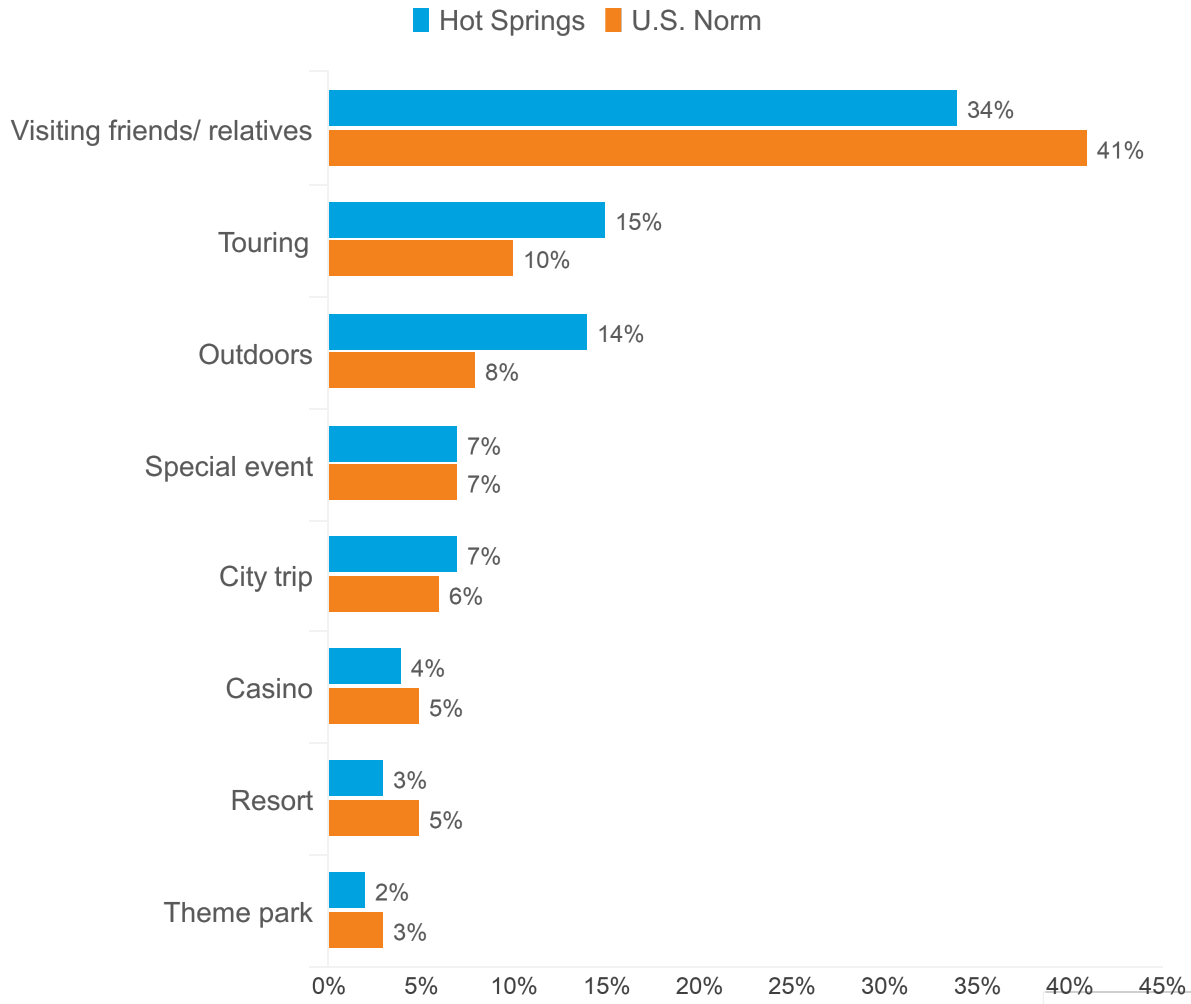
2% Theme park

3% Conference/ Convention

3% Other business trip

3% Business-Leisure

Main Purpose of Leisure Trip



Structure of the U.S. and Hot Springs Overnight Travel Market

Base: 2022 Overnight Person-Trips

2022 U.S. Overnight Trips

Visiting friends/relatives	41%
Marketable	48%
Business	8%
Business-leisure	4%

2022 Hot Springs Overnight Trips

Visiting friends/relatives	34%
Marketable	56%
Business	6%
Business-leisure	3%

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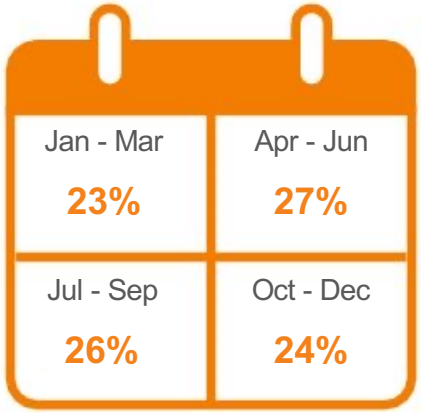
Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

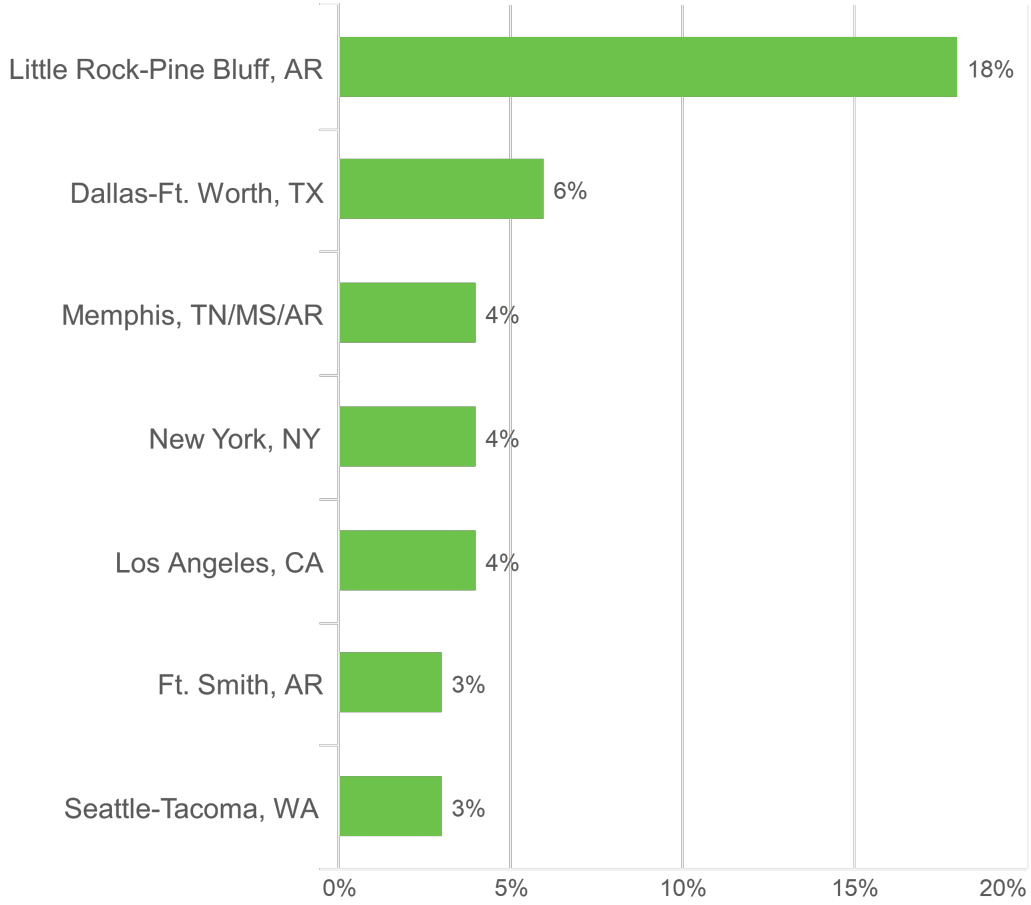
State Origin Of Trip



Season of Trip
Total Overnight Person-Trips

State of Origin is Top States by Index

DMA Origin Of Trip



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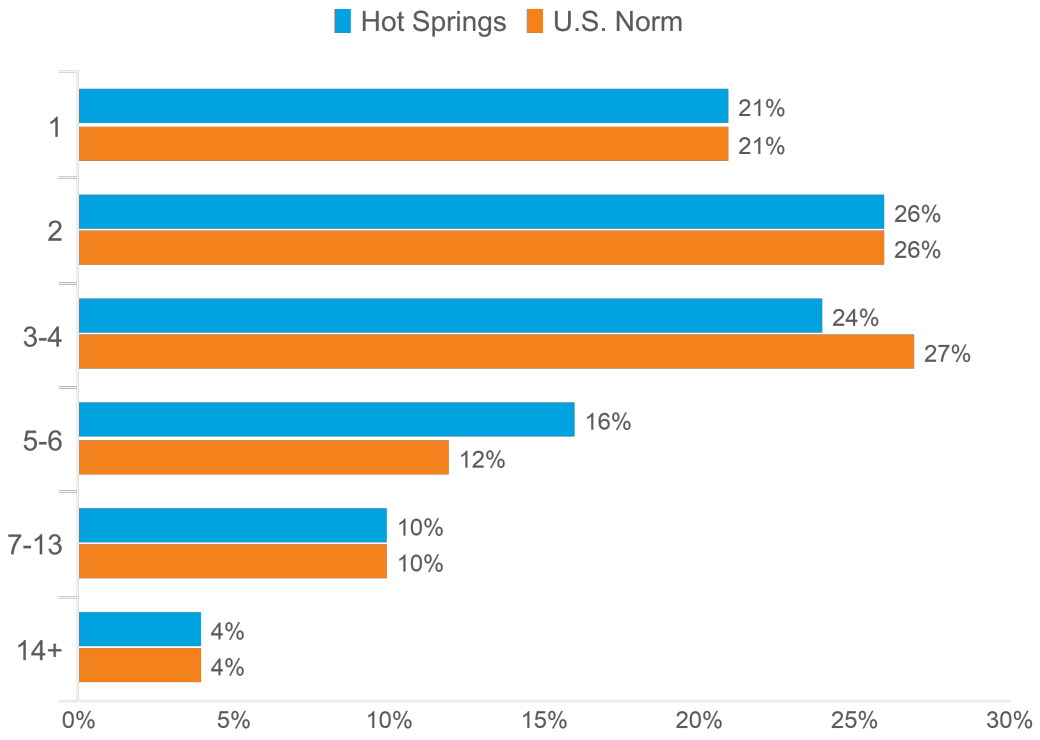
Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

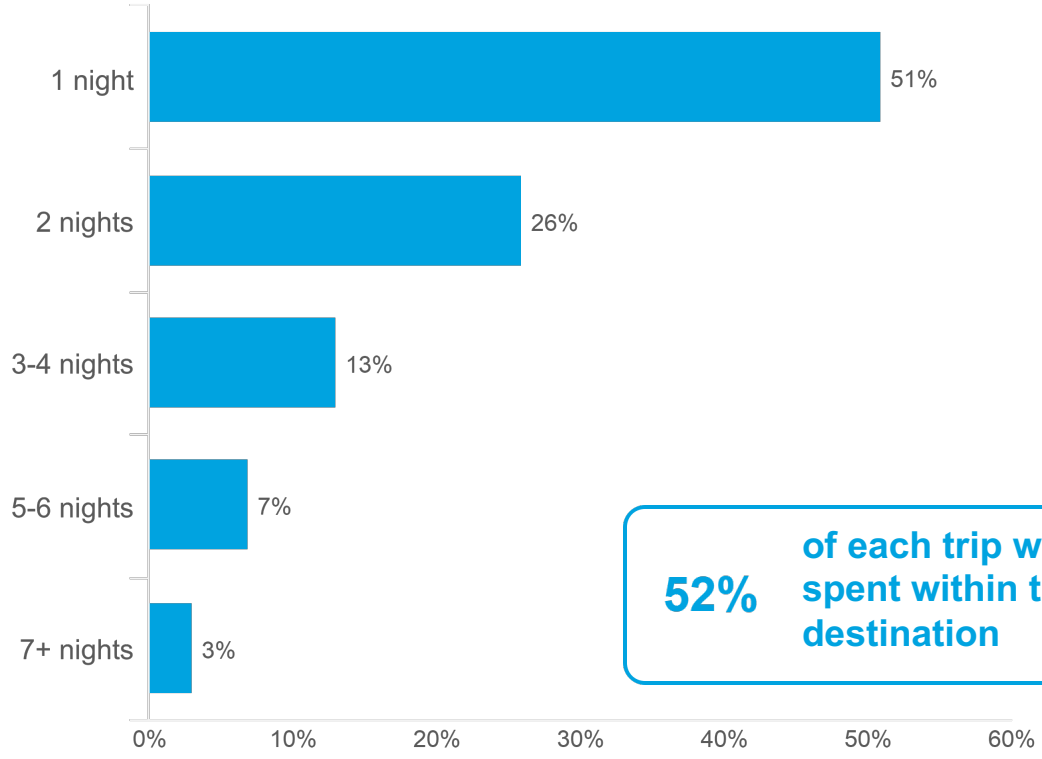
Total Nights Away on Trip



Hot Springs
4.0
Average Nights

U.S. Norm
3.9
Average Nights

Nights Spent in Hot Springs



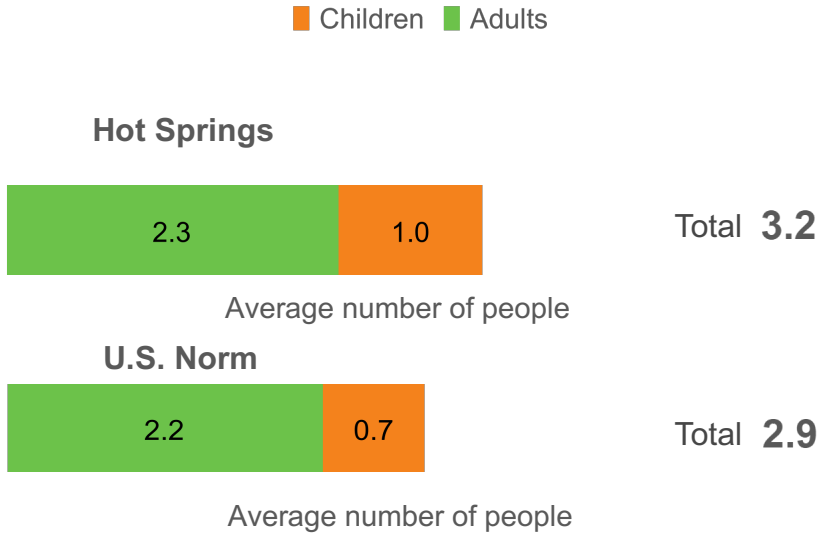
52% of each trip was spent within the destination

Average number of nights
2.1

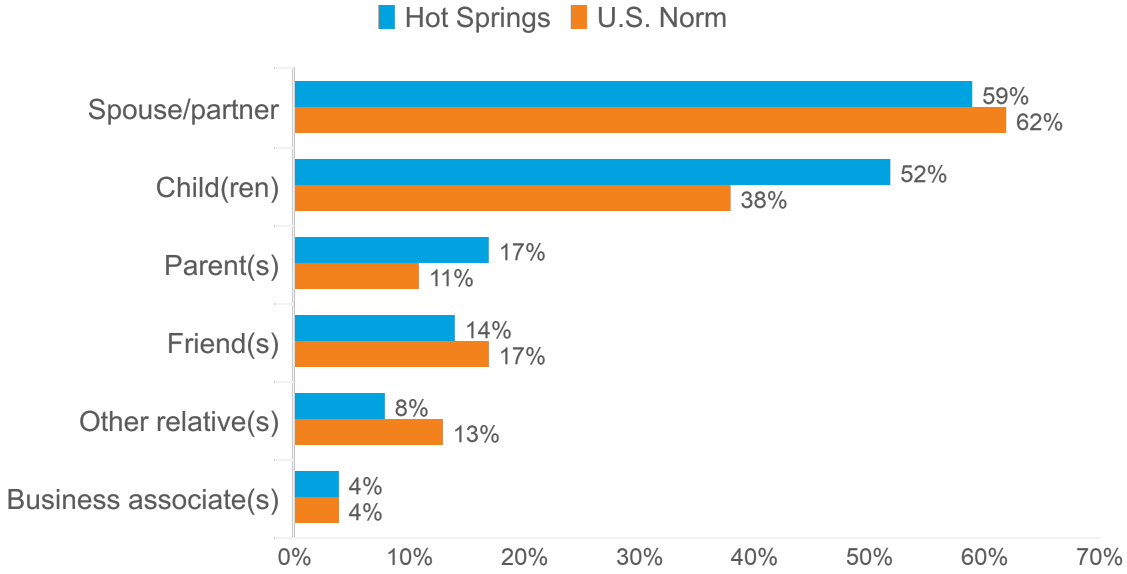
Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Size of Travel Party

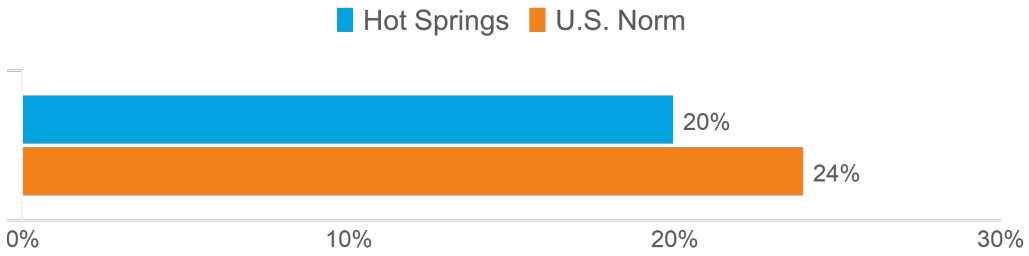


Composition of Immediate Travel Party

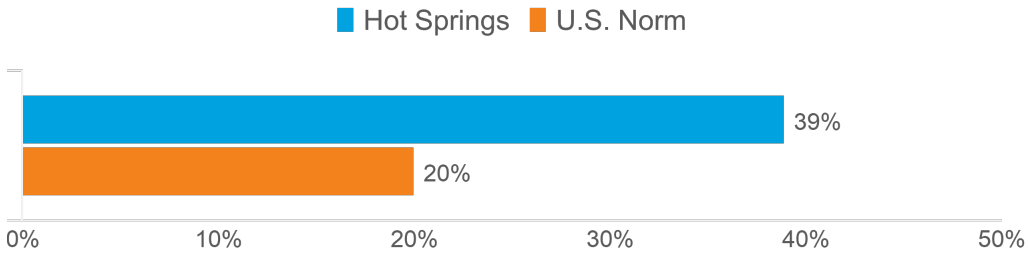


Base: 2022 Overnight Person-Trips that included more than one person

Percent Who Traveled Alone



Percent Who Had Travel Party Member with Disabilities



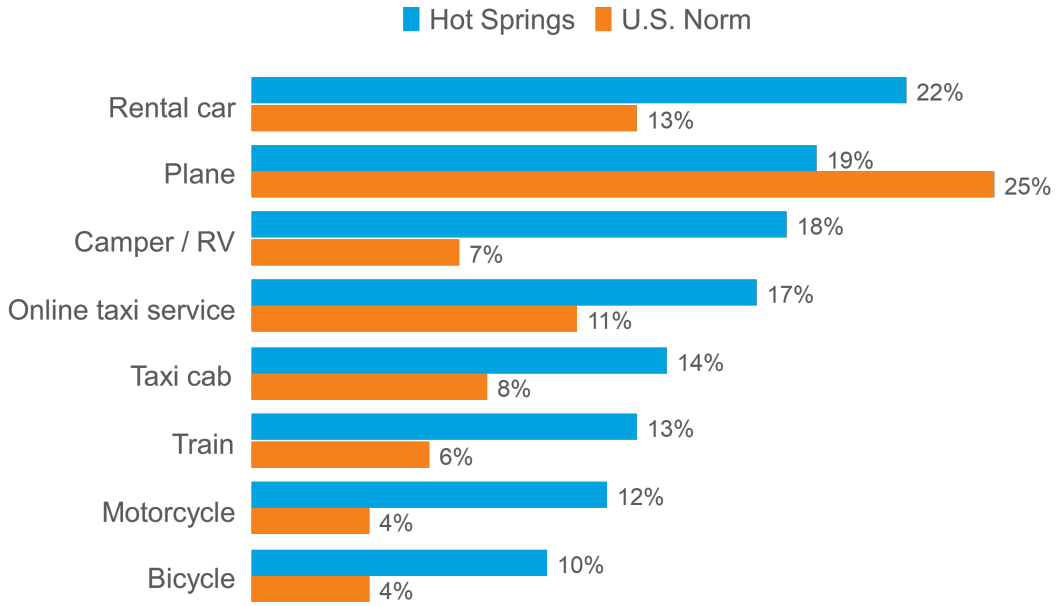
Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Transportation Used to get to Destination

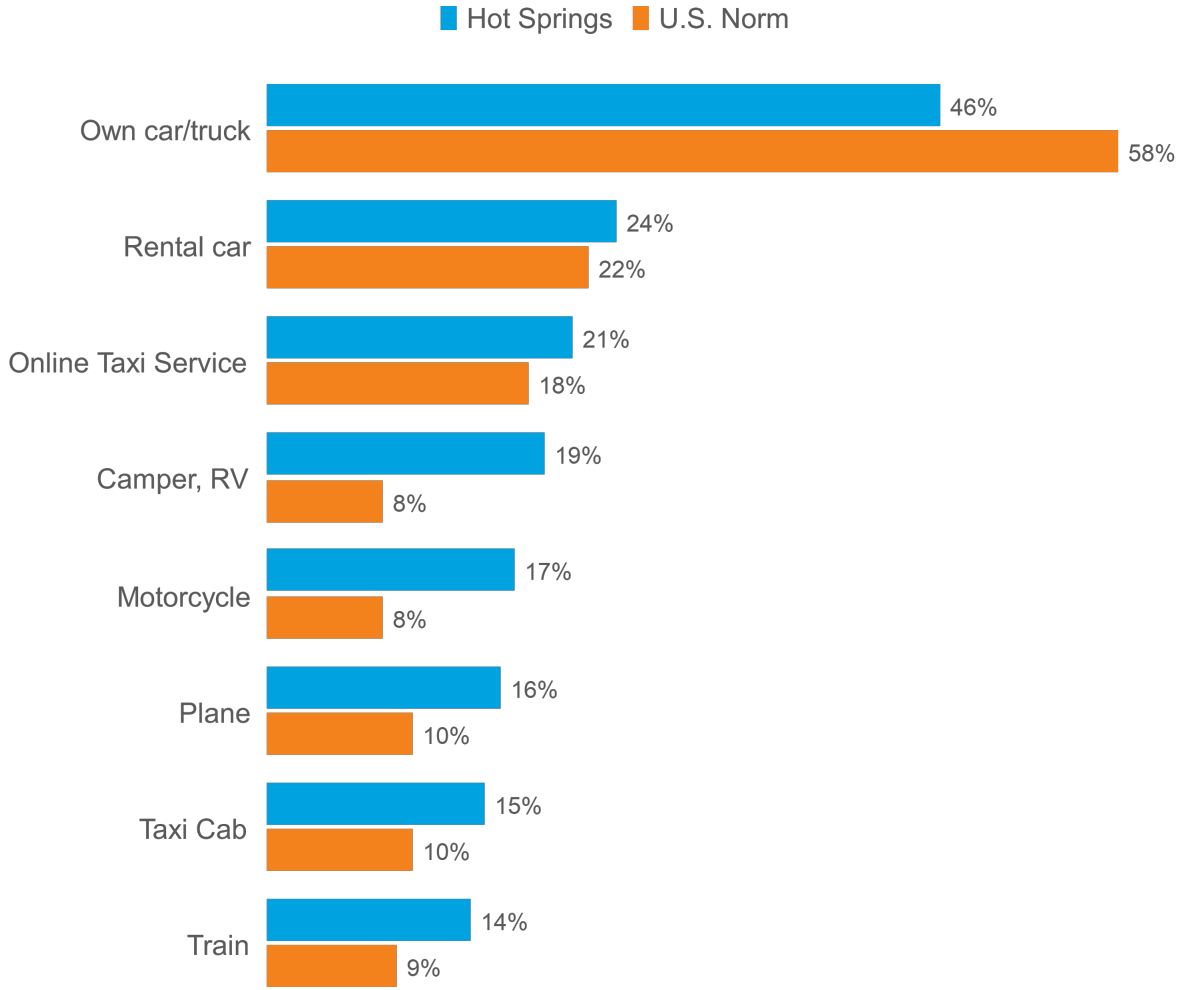
71% **of overnight travelers use own car/truck to get to their destination**

U.S. Norm: 68%



Question updated in 2020

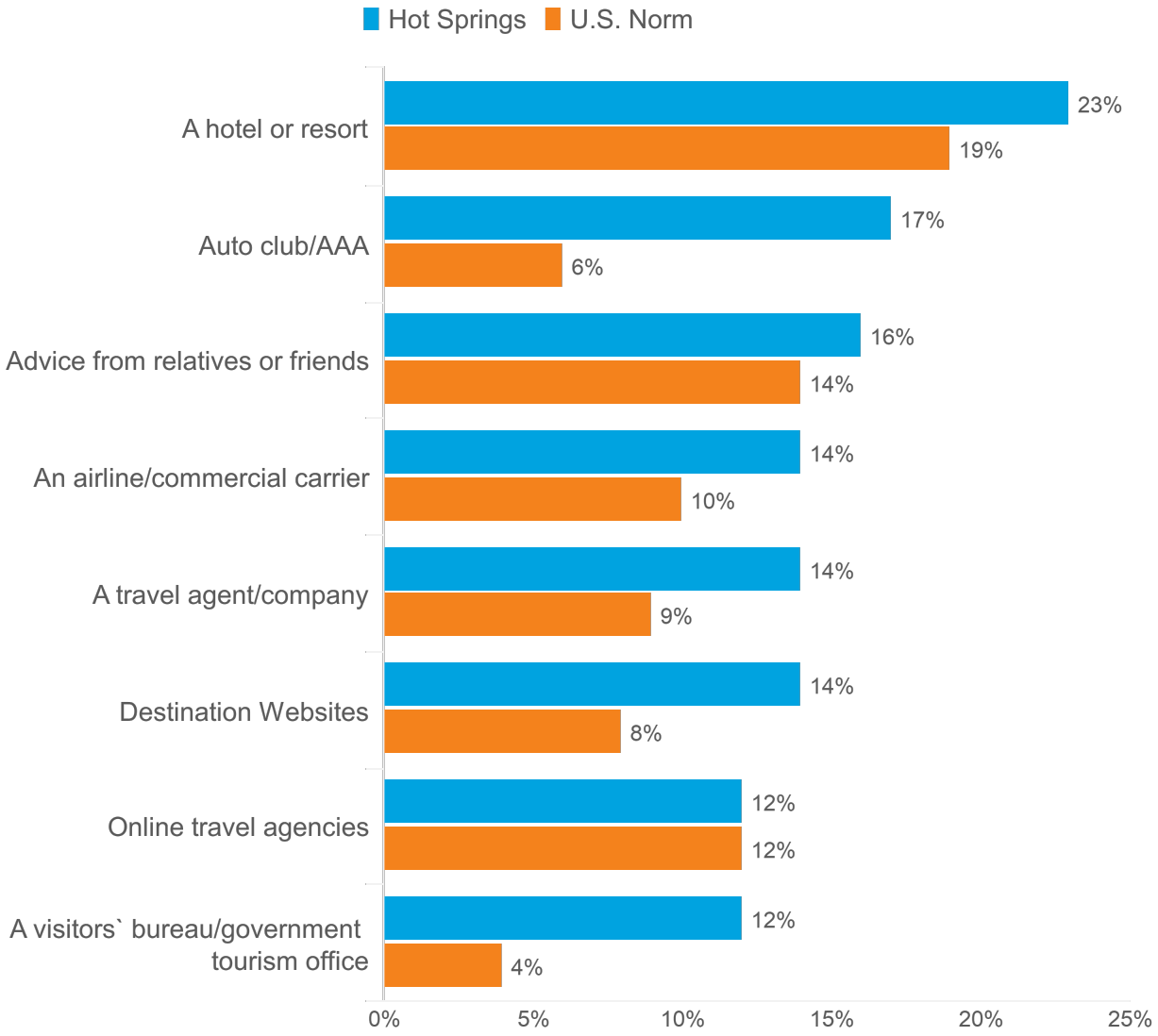
Transportation Used within Destination



Hot Springs: Pre-Trip

Base: 2022 Overnight Person-Trips

Trip Planning Information Sources



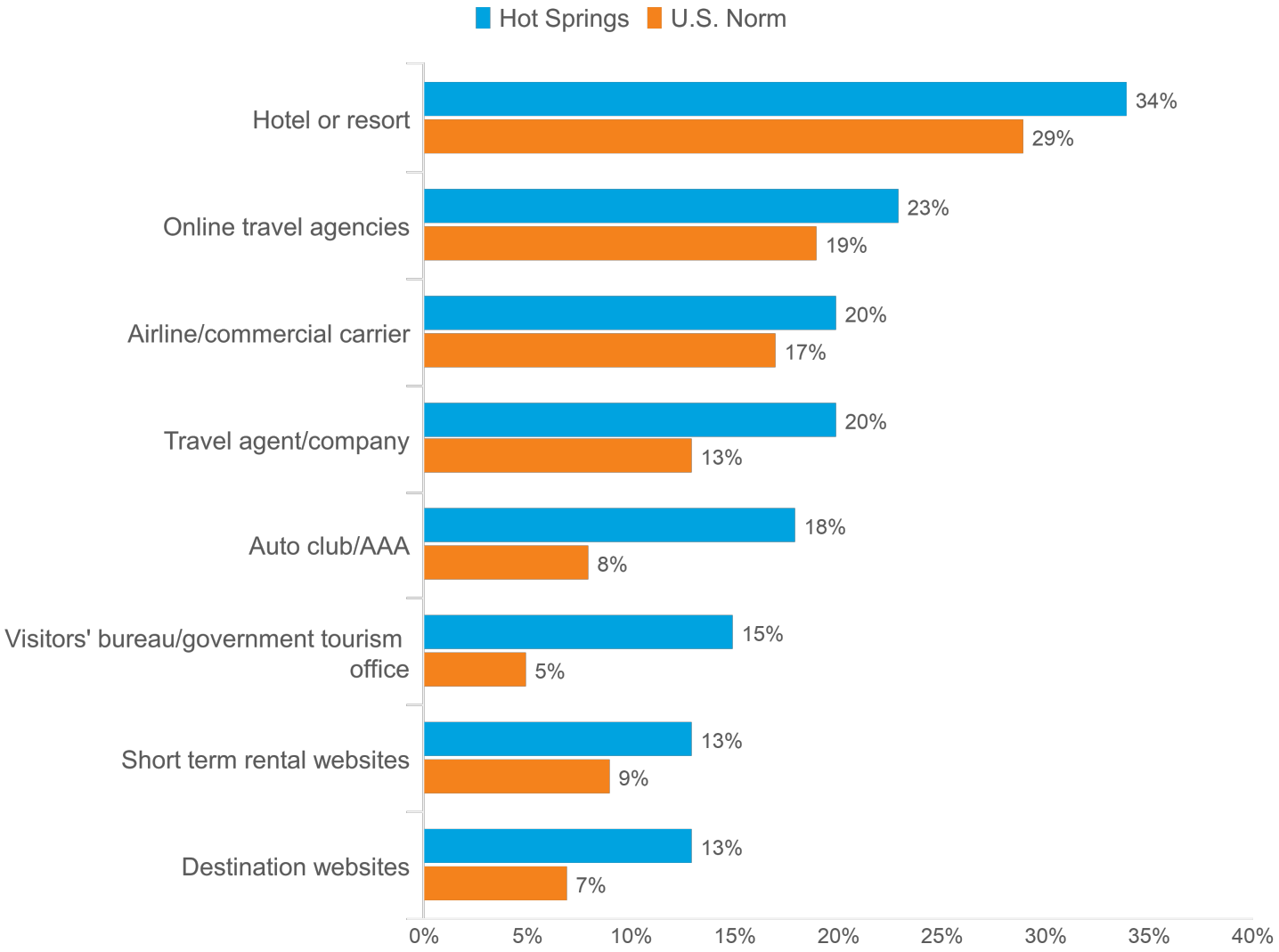
Length of Trip Planning

	Hot Springs	U.S. Norm
1 month or less	**27%**	**31%**
2 months	**14%**	**16%**
3-5 months	**22%**	**18%**
6-12 months	**18%**	**14%**
More than 1 year in advance	**8%**	**5%**
Did not plan anything in advance	**11%**	**16%**

Hot Springs' Overnight Trip Characteristics

Base: 2022 Overnight Person-Trips

Method of Booking



Accommodations

	Hot Springs	U.S. Norm
Hotel	**47%**	**41%**
Motel	**21%**	**12%**
Bed & breakfast	**16%**	**7%**
Country inn / lodge	**13%**	**4%**
Home of friends / relatives	**13%**	**20%**
Campground / RV park	**12%**	**5%**
Rented home / condo / apartment	**11%**	**6%**

Hot Springs: During Trip

Base: 2022 Overnight Person-Trips

Activity Groupings

Outdoor Activities

67%

U.S. Norm: 48%

Entertainment Activities

65%

U.S. Norm: 54%

Cultural Activities

49%

U.S. Norm: 29%

Sporting Activities

38%

U.S. Norm: 21%

Business Activities

30%

U.S. Norm: 17%

Activities and Experiences (Top 10)

	Hot Springs	U.S. Norm
Shopping	23%	26%
Sightseeing	21%	20%
Museum	21%	11%
National/state park	17%	8%
Landmark/historic site	16%	13%
Casino	16%	12%
Fishing	14%	7%
Attending celebration	14%	14%
Bar/nightclub	14%	15%
Business meeting	14%	9%

Hot Springs: During Trip

Base: 2022 Overnight Person-Trips

Shopping Types on Trip

	Hot Springs	U.S. Norm
Outlet/mall shopping	**46%**	**48%**
Convenience/grocery shopping	**43%**	**44%**
Souvenir shopping	**39%**	**41%**
Big box stores (Walmart, Costco)	**39%**	**33%**
Boutique shopping	**35%**	**29%**
Antiquing	**33%**	**12%**

Base: 2022 Overnight Person-Trips that included Shopping

Dining Types on Trip

	Hot Springs	U.S. Norm
Unique/local food	**50%**	**47%**
Street food/food trucks	**33%**	**23%**
Food delivery service (UberEATS, DoorDash, etc.)	**28%**	**21%**
Fine/upscale dining	**27%**	**25%**
Picnicking	**22%**	**13%**
Gastropubs	**14%**	**10%**

Hot Springs: During Trip

Base: 2022 Overnight Person-Trips

68%

of overnight travelers were very satisfied with their overall trip experience

*Very satisfied = selected top box on a five point scale

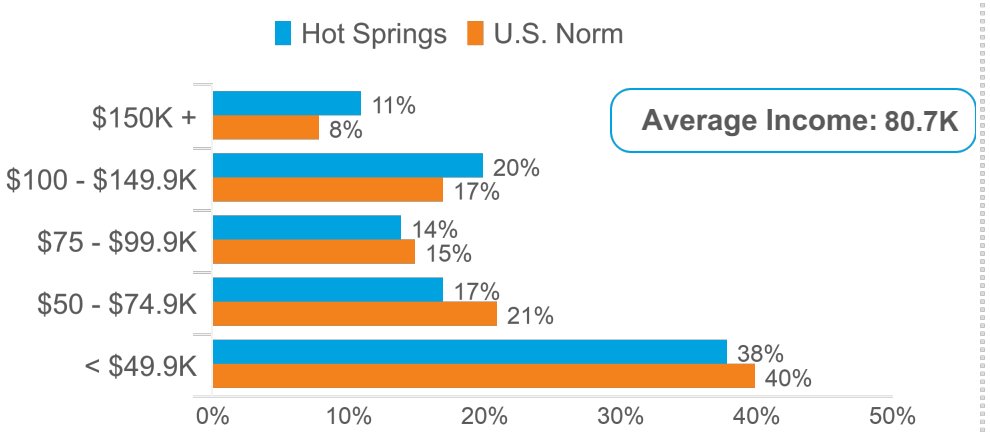
Ease of Accessibility only asked to those with travel limiting disabilities within travel party

Question updated in 2020

Demographic Profile of Overnight Hot Springs Visitors

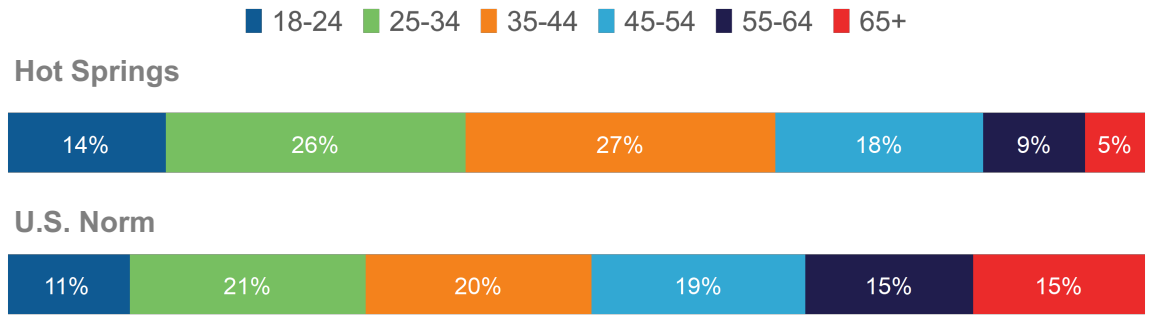
Base: 2022 Overnight Person-Trips

Household Income



Average Income: 80.7K

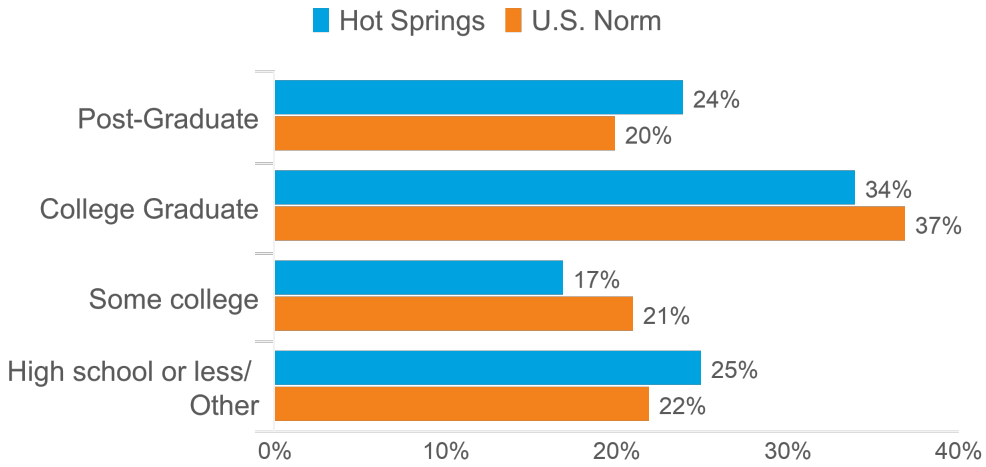
Age



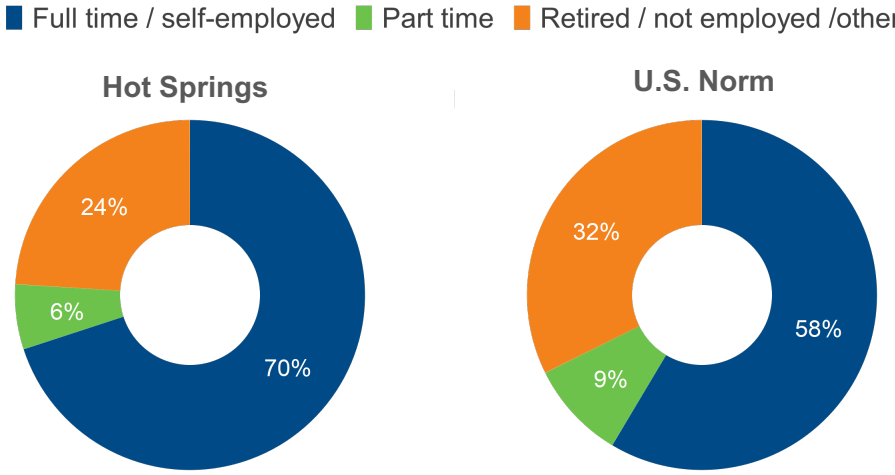
Average Age 39.9

Average Age 44.8

Educational Attainment



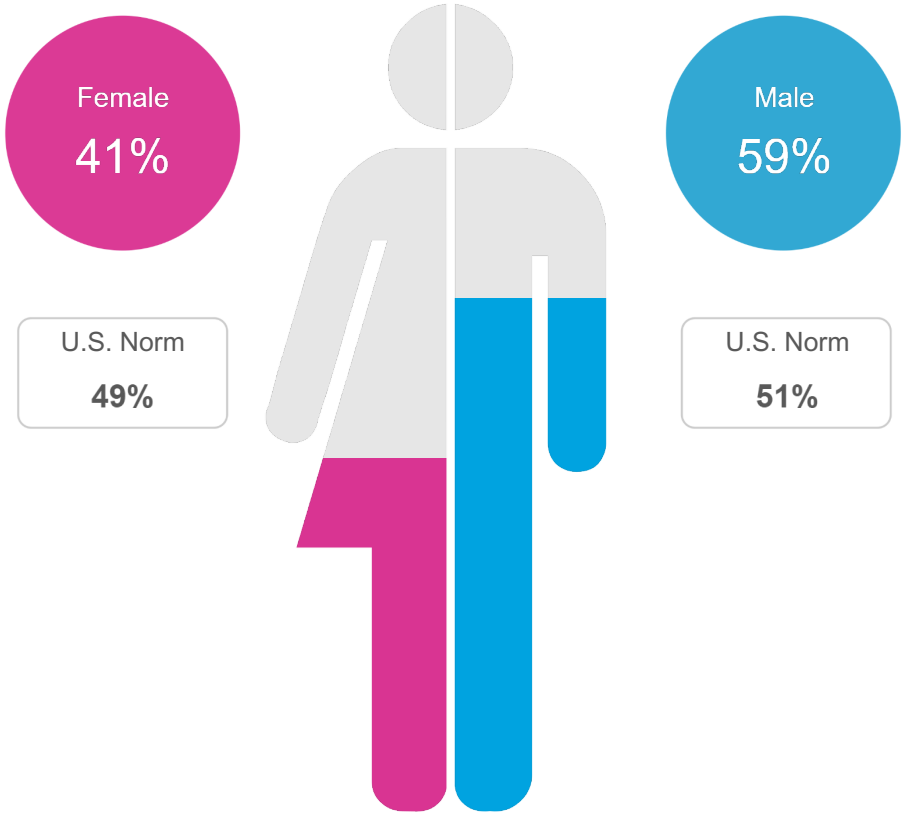
Employment



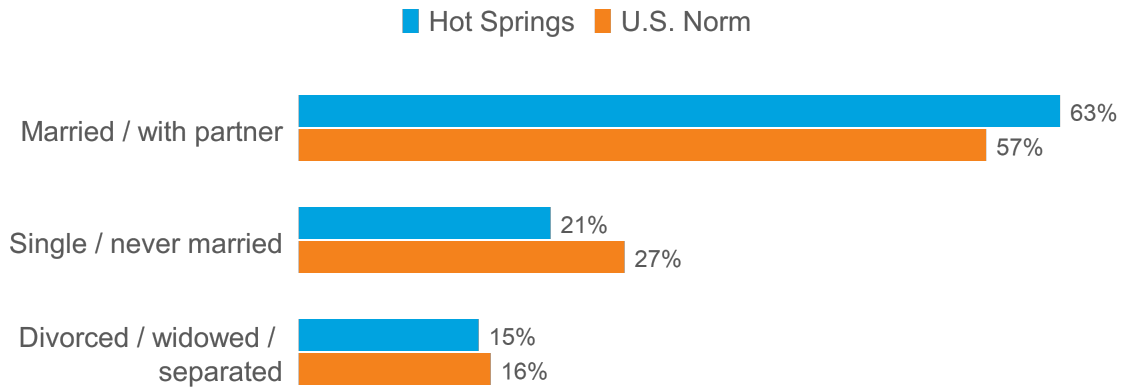
Demographic Profile of Overnight Hot Springs Visitors

Base: 2022 Overnight Person-Trips

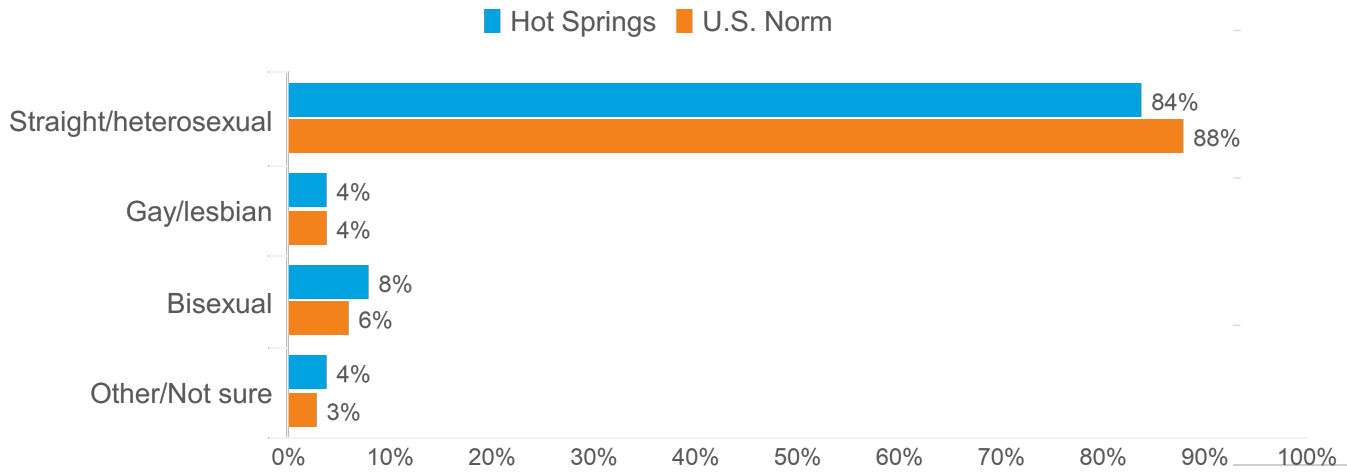
Gender



Marital Status



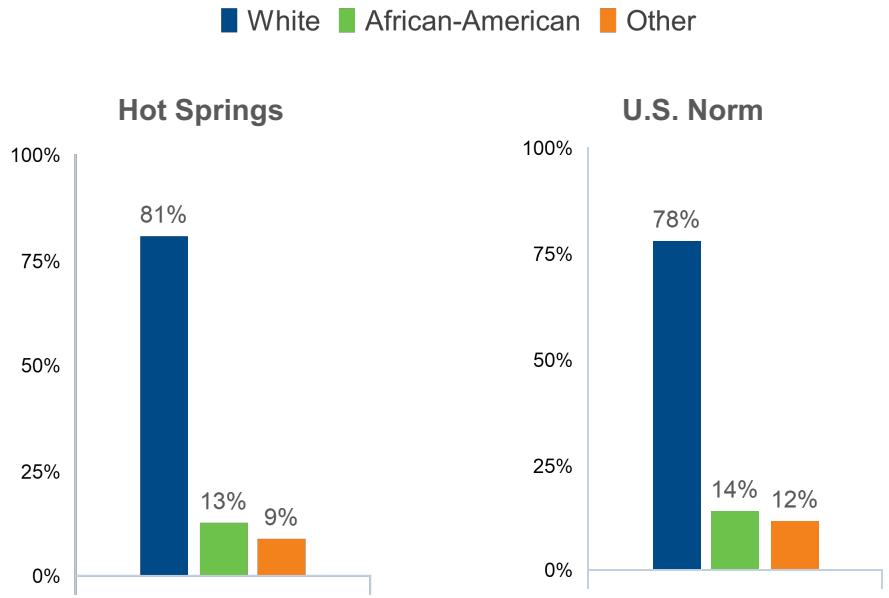
Sexual Orientation



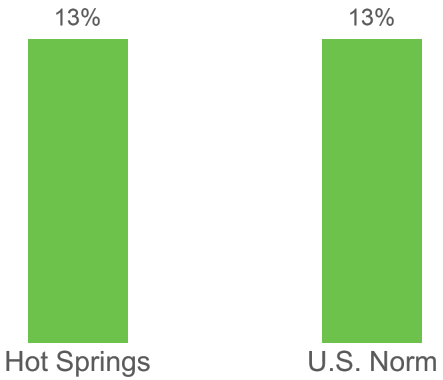
Demographic Profile of Overnight Hot Springs Visitors

Base: 2022 Overnight Person-Trips

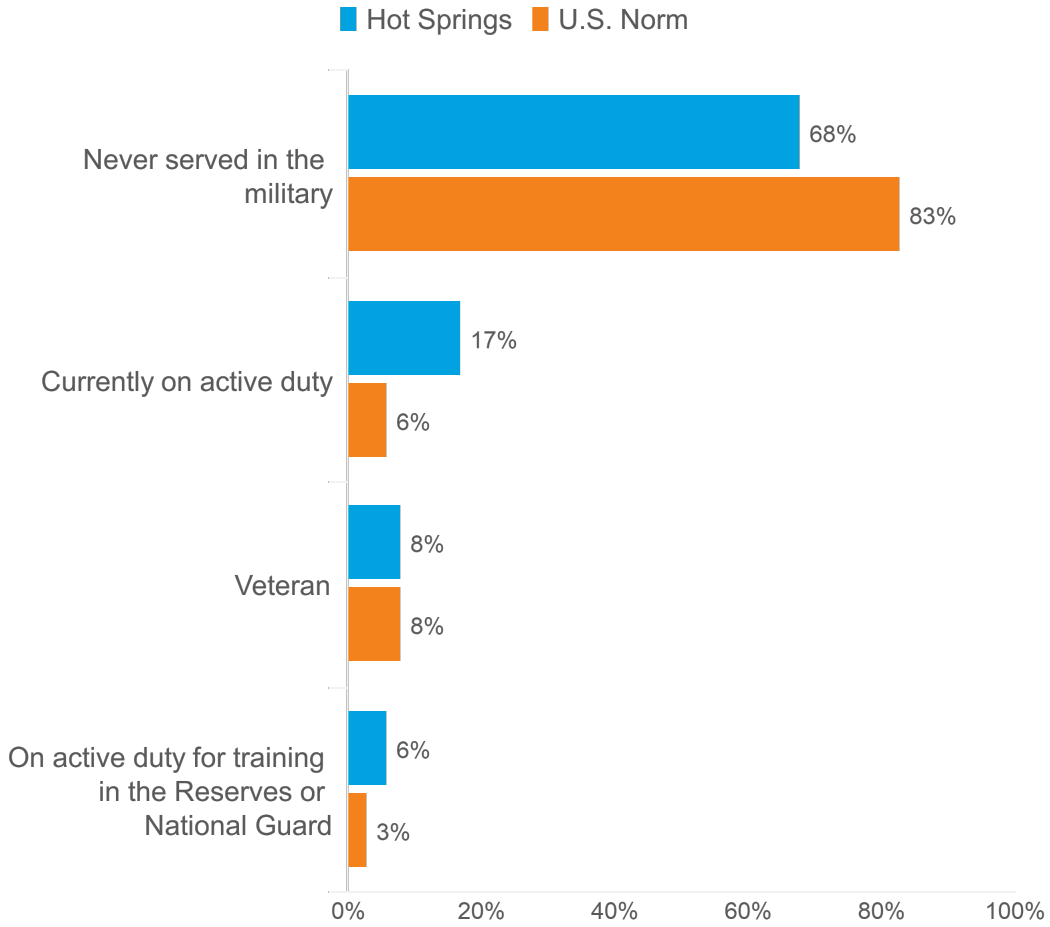
Race



Hispanic Background



Military Status



Demographic Profile of Overnight Hot Springs Visitors

Base: 2022 Overnight Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	17%	34%	23%	16%	11%
U.S. Norm	22%	33%	18%	14%	12%

Children in Household

Hot Springs

No children under 18	38%
Any 13-17	26%
Any 6-12	39%
Any child under 6	21%

U.S. Norm

No children under 18	54%
Any 13-17	21%
Any 6-12	25%
Any child under 6	17%

COMPASS

Longwoods INTERNATIONAL

Travel USA Visitor Profile

Day Visitation

HOT SPRINGS NATIONAL PARK ARKANSAS

2021/2022

Longwoods Travel USA®

Introduction

- Longwoods International began tracking domestic American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- It is currently the largest ongoing study conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- The visitor profile data for this portion of the report is drawn directly from the survey and is a combination of 2021 and 2022 trips. This is to ensure a sufficient sample base for reliable results.
- However, visitor volumes and expenditures represent 2022 only. These are based on our survey data and a careful review of other known destination data sources to ensure that our estimates are as accurate as possible, such as government data and STR reporting.

Methodology

Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Longwoods Travel USA®** survey. Respondents are selected to be representative of the U.S. adult population.

For Hot Springs, the following sample was achieved in 2021/2022:

Day Base Size

509

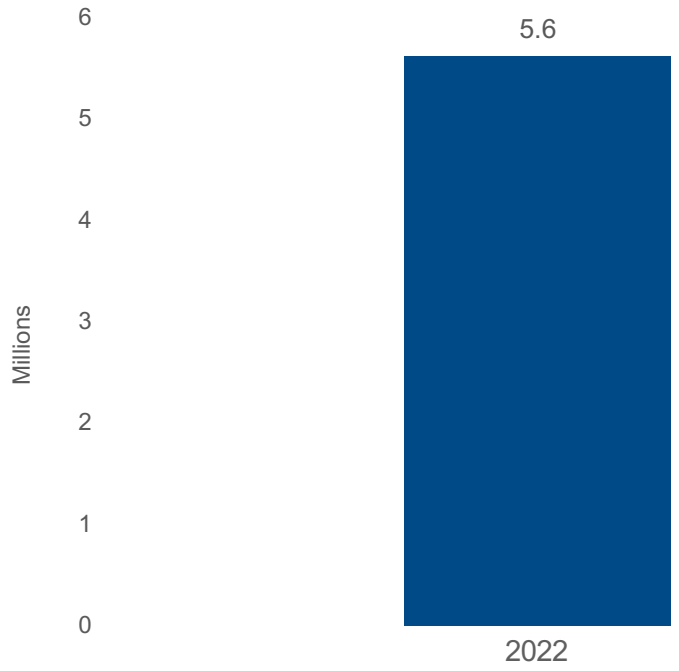
A **day trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Size and Structure of Hot Springs' Domestic Travel Market

Base: 2022 Day Person-Trips

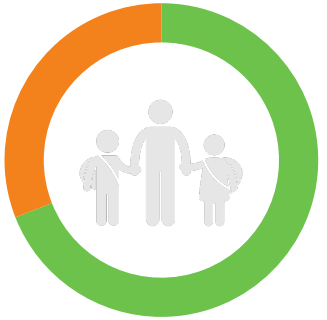
Day Trips to Hot Springs



Size of Hot Springs' Day Travel Market - Adults vs. Children

Total Day Person-Trips

5.6 Million



Adults
69% **3.9 Million**

Children
31% **1.7 Million**

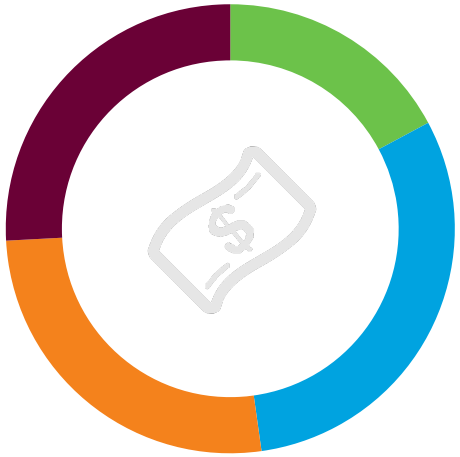
Hot Springs' Day Trip Expenditures

Base: 2022 Day Person-Trips

Domestic Day Expenditures - by Sector

Total Spending

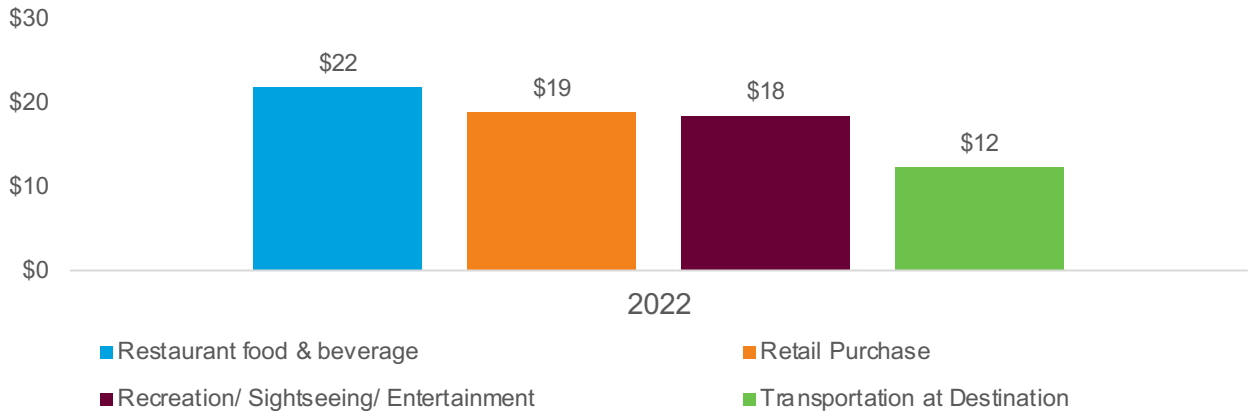
$ 0.402 Billion



Transportation at Destination	17%	$69 Million
Restaurant Food & Beverage	31%	$123 Million
Retail Purchase	26%	$106 Million
Recreation/Entertainment	26%	$104 Million

Average Per Person Per Trip Expenditures on Domestic Day Trips - by Sector

Average Per Person Per Trip: $72



Hot Springs' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips

Main Purpose of Trip

25%
Visiting friends/ relatives

18%
Touring

18%
Outdoors

12%
City trip

7%
Special event

5%
Casino

4%
Cruise

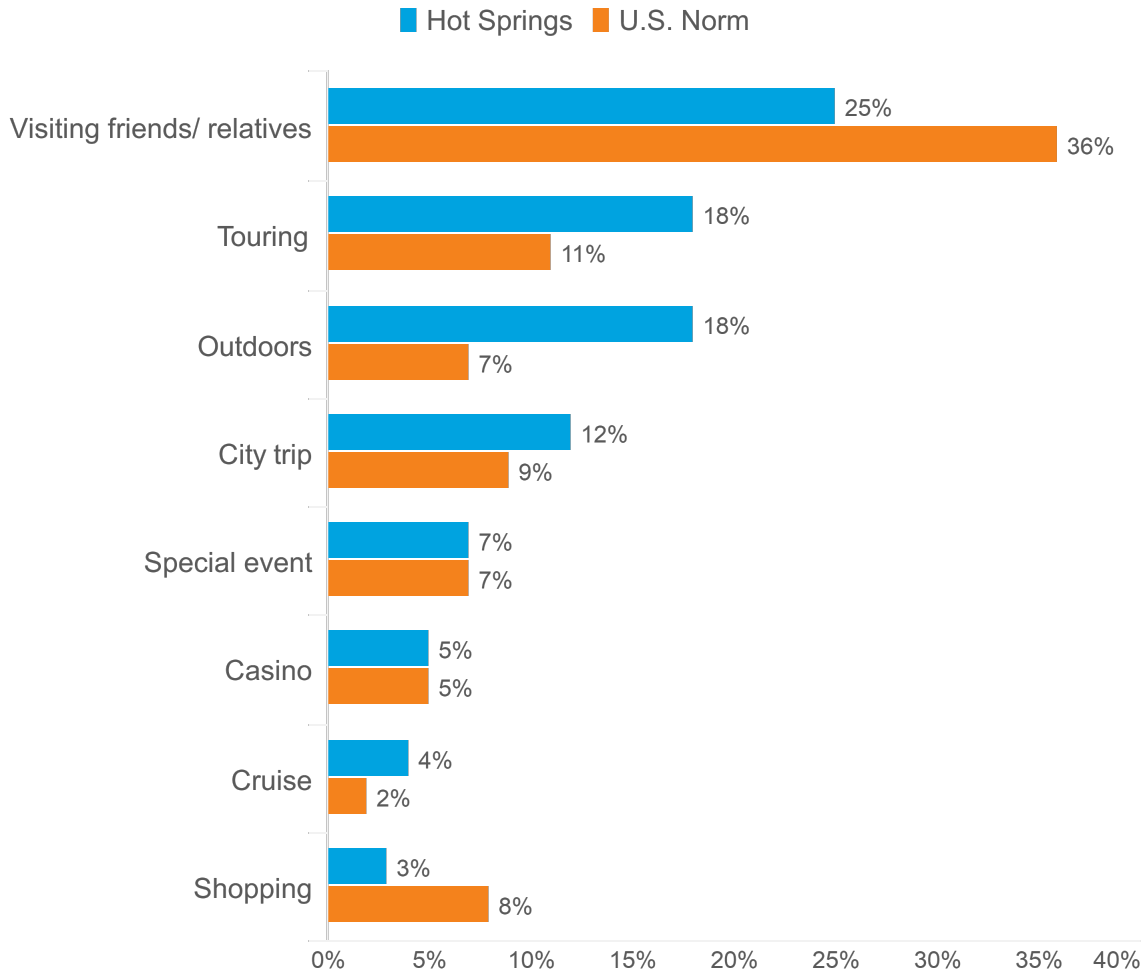
3%
Shopping

<1%
Conference/ Convention

2%
Other business trip

2%
Business-Leisure

Main Purpose of Leisure Trip



Structure of the U.S. and Hot Springs Day Travel Market

Base: 2021/2022 Day Person-Trips

2022 U.S. Day Trips

Visiting friends/relatives	36%
Marketable	56%
Business	5%
Business-leisure	3%

Hot Springs Day Trips

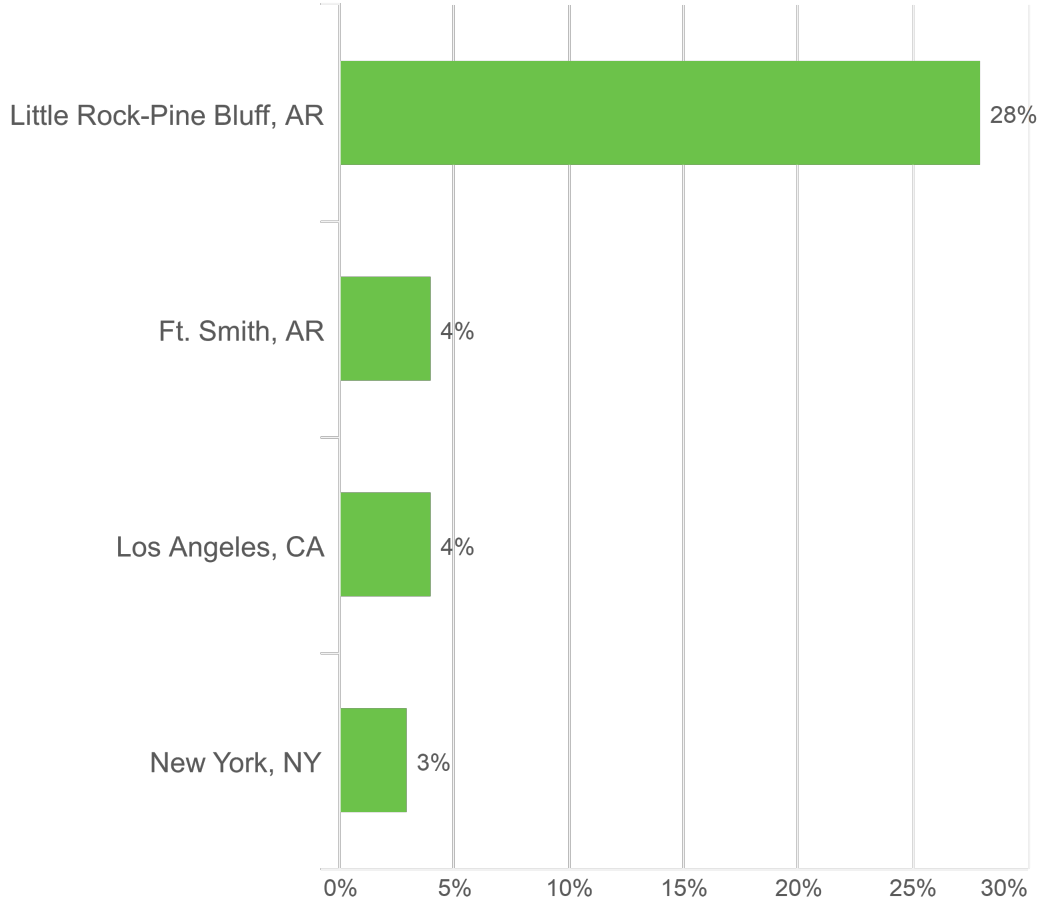
Visiting friends/relatives	25%
Marketable	71%
Business	2%
Business-leisure	2%

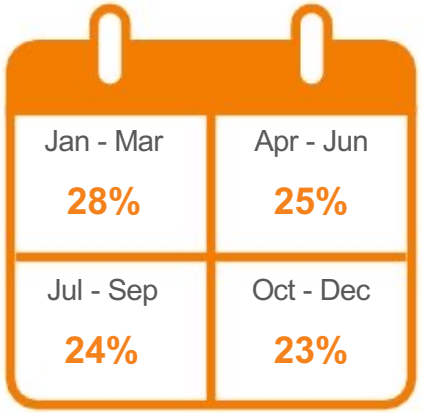
Hot Springs' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips

State Origin Of Trip

DMA Origin Of Trip





Season of Trip

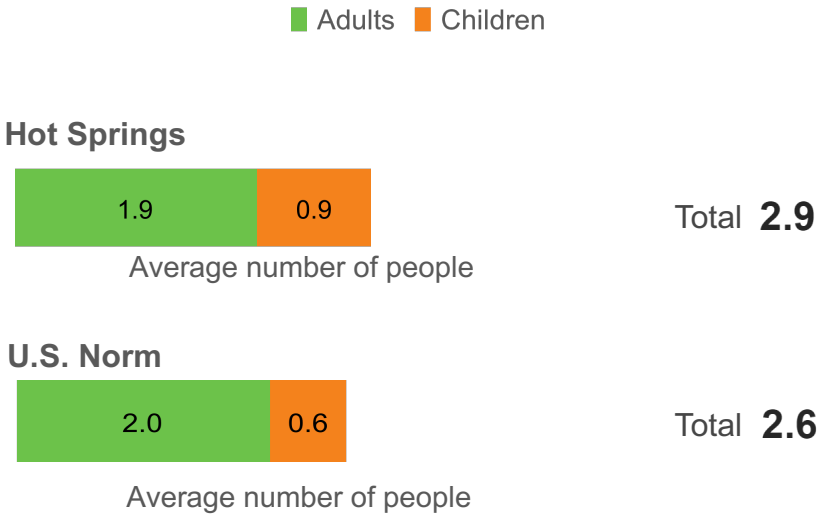
Total 2022 Day Person-Trips

State of Origin is Top States by Index

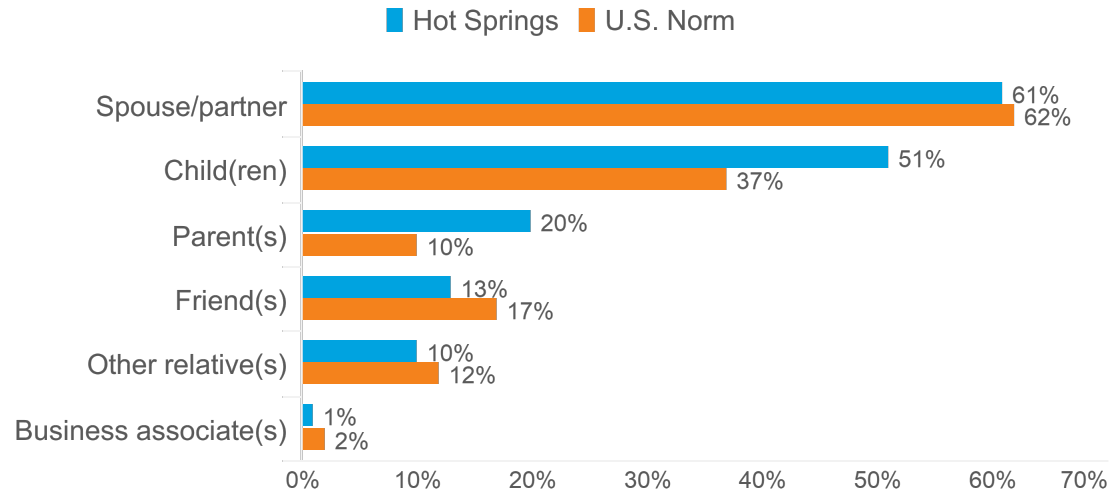
Hot Springs' Day Trip Characteristics

Base: 2021/2022 Day Person-Trips

Size of Travel Party

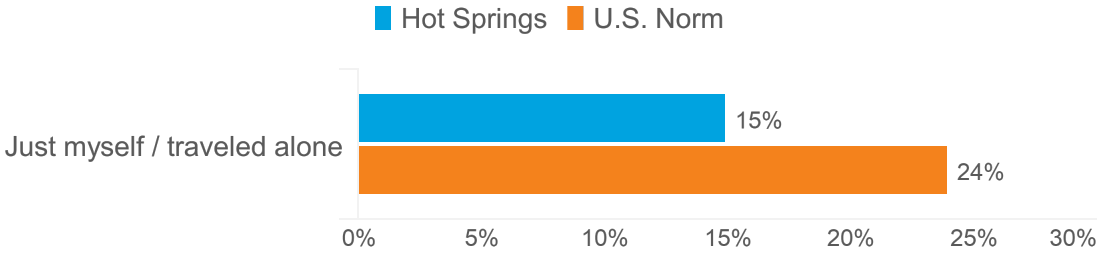


Composition of Immediate Travel Party

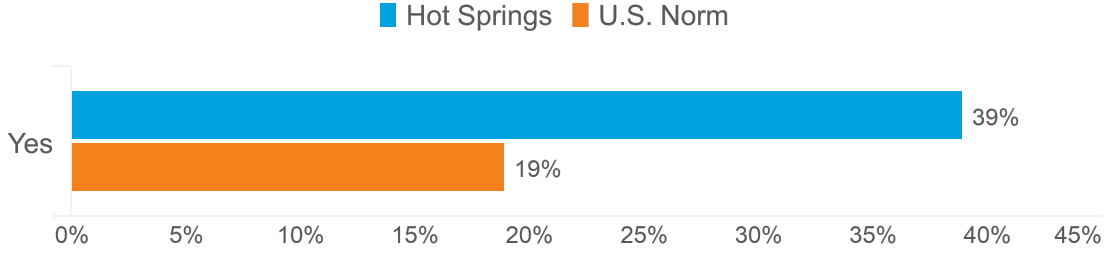


Base: 2021/2022 Overnight Person-Trips that included more than one person

Percent Who Traveled Alone



Percent Who Had Travel Party Member with Disabilities



Question added in 2022, data is for 2022 only

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Hot Springs: During Trip

Base: 2021/2022 Day Person-Trips

Activity Groupings

Outdoor Activities

50%

U.S. Norm: 34%

Entertainment Activities

44%

U.S. Norm: 40%

Cultural Activities

31%

U.S. Norm: 20%

Sporting Activities

30%

U.S. Norm: 14%

Business Activities

24%

U.S. Norm: 11%

Activities and Experiences (Top 10)

	Hot Springs	U.S. Norm
Shopping	16%	21%
Attending celebration	11%	10%
Sightseeing	11%	13%
Business convention/conference	10%	4%
Fishing	10%	4%
National/state park	10%	5%
Casino	9%	8%
Swimming	9%	6%
Museum	9%	7%
Attended/participated in an amateur sports event	9%	3%

Question updated in 2020

Hot Springs: During Trip

Base: 2021/2022 Day Person-Trips

Shopping Types on Trip

	Hot Springs	U.S. Norm
Outlet/mall shopping	55%	48%
Big box stores (Walmart, Costco)	35%	29%
Convenience/grocery shopping	29%	28%
Boutique shopping	27%	23%
Antiquing	23%	12%
Souvenir shopping	17%	26%

Base: 2021/2022 Day Person-Trips that included Shopping

Dining Types on Trip

	Hot Springs	U.S. Norm
Unique/local food	36%	38%
Picnicking	23%	12%
Street food/food trucks	22%	19%
Food delivery service (UberEATS, DoorDash, etc.)	22%	13%
Fine/upscale dining	21%	15%
Gastropubs	13%	7%

Question added in 2020

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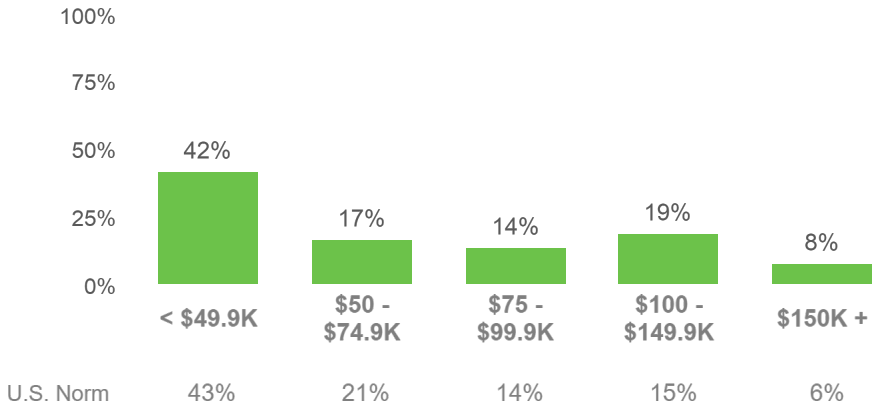
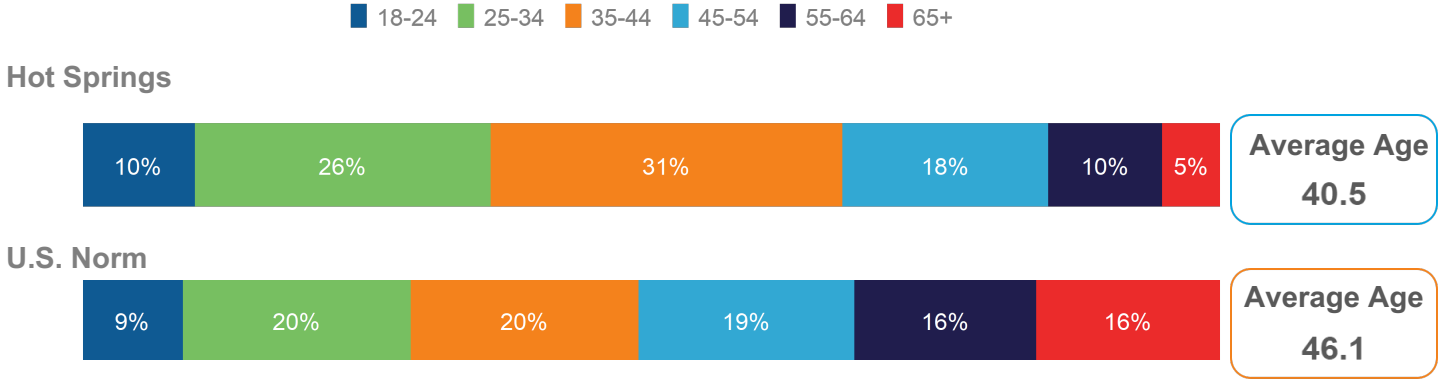
Demographic Profile of Day Hot Springs Visitors

Base: 2021/2022 Day Person-Trips

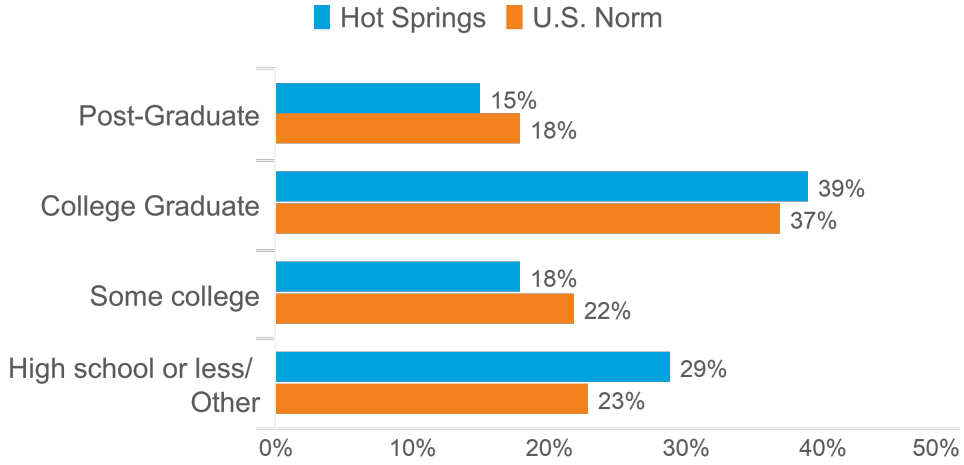
Household Income



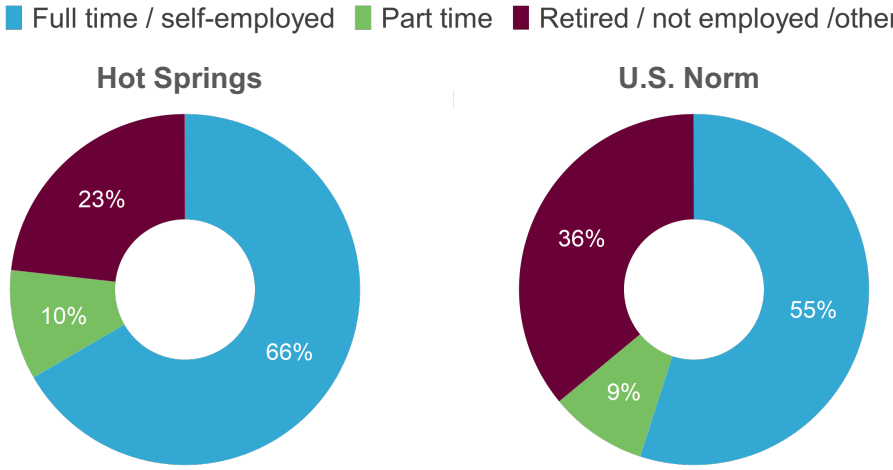
Age



Educational Attainment



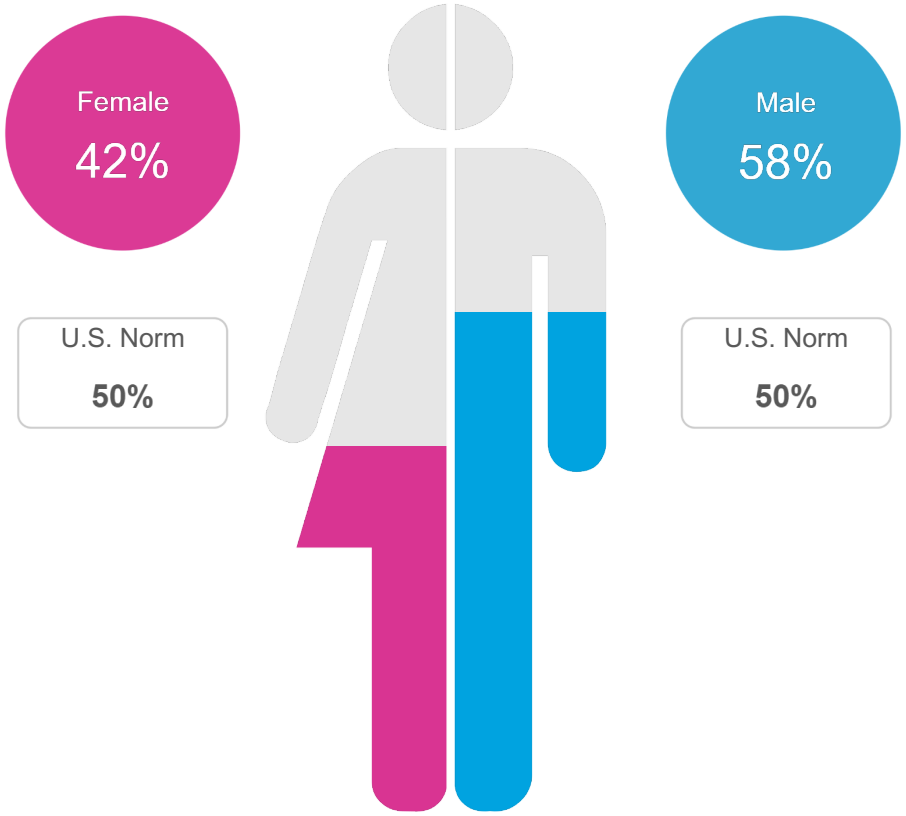
Employment



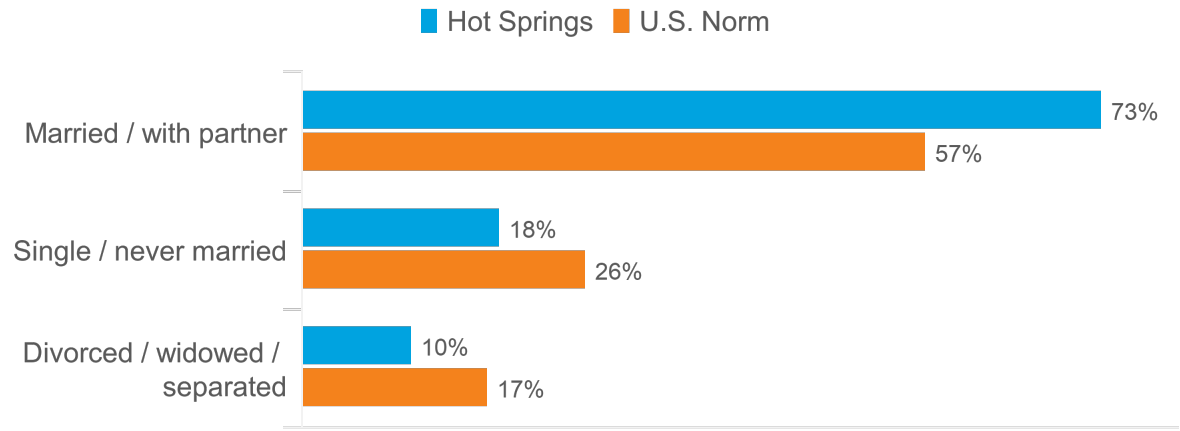
Demographic Profile of Day Hot Springs Visitors

Base: 2021/2022 Day Person-Trips

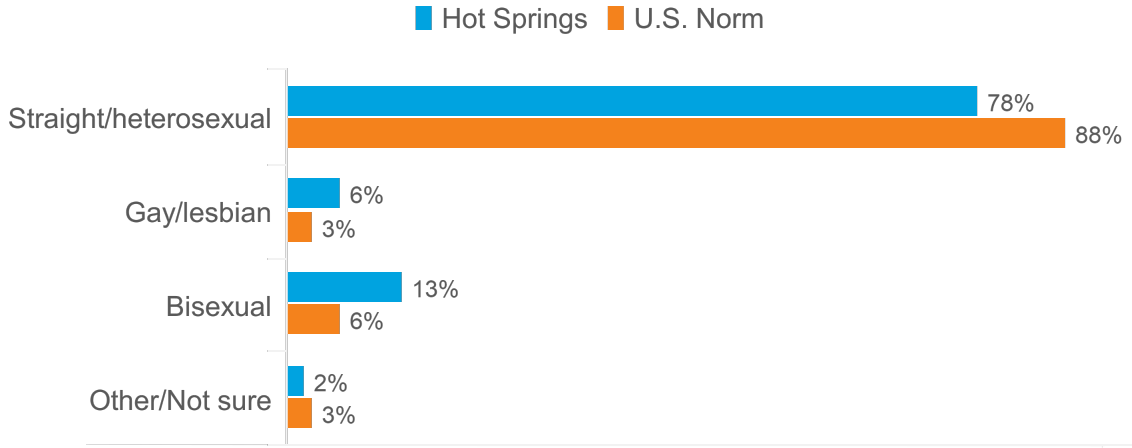
Gender



Marital Status



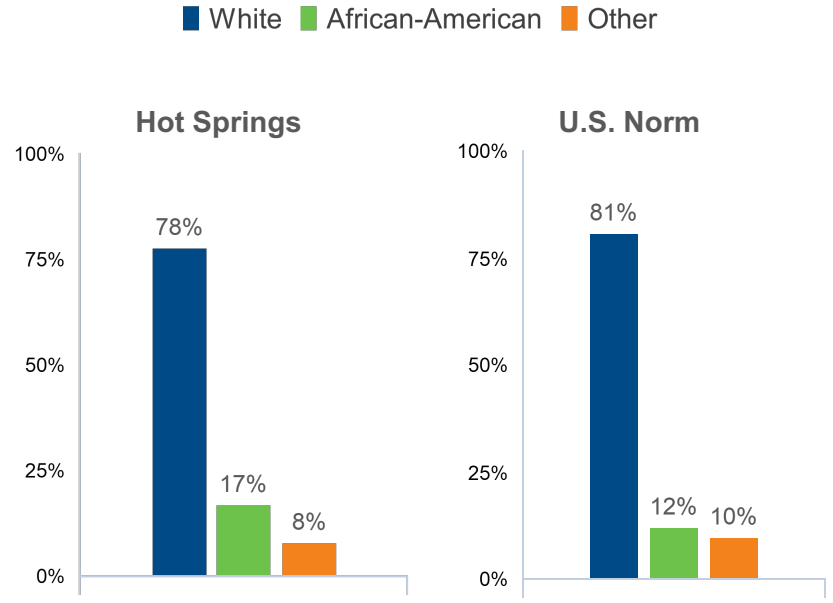
Sexual Orientation



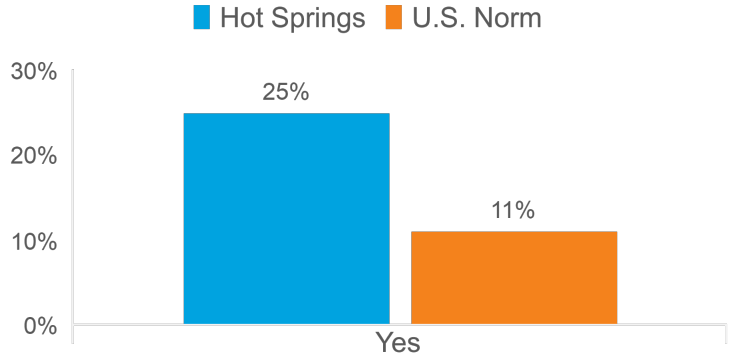
Demographic Profile of Day Hot Springs Visitors

Base: 2021/2022 Day Person-Trips

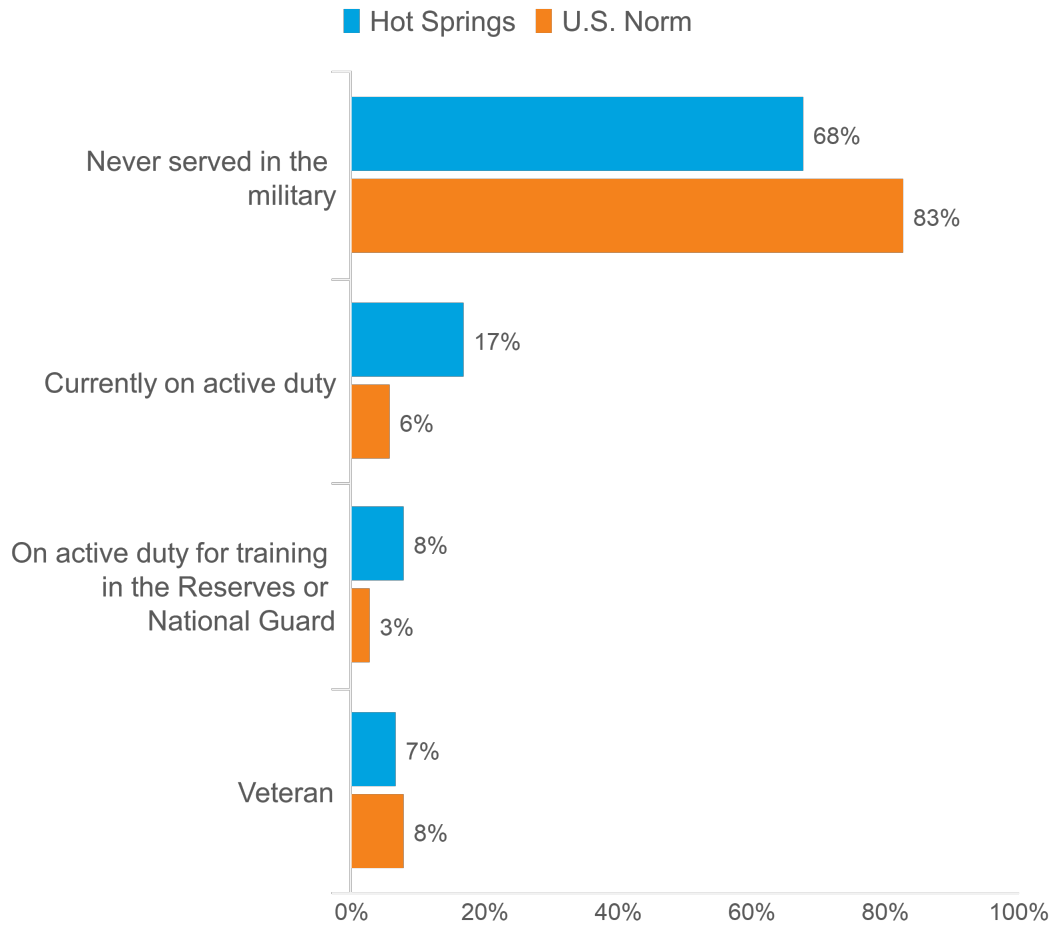
Race



Hispanic Background



Military Status



Question added in 2022, data is for 2022 only

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Demographic Profile of Day Hot Springs Visitors

Base: 2021/2022 Day Person-Trips

Household Size

	1 member	2 members	3 members	4 members	5+ members
	15%	29%	28%	14%	14%
U.S. Norm	23%	34%	19%	14%	11%

Children in Household

Hot Springs

No children under 18	37%
Any 13-17	24%
Any 6-12	39%
Any child under 6	23%

U.S. Norm

No children under 18	56%
Any 13-17	20%
Any 6-12	24%
Any child under 6	16%

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