

## ***Geographic Origin Segmentation***

Six major geographic segments of nonresident business and pleasure motorists traveling in Idaho emerged from the database. These segments include travelers from the areas of Spokane and Seattle, Washington; Portland, Oregon; Salt Lake City, Utah (SLC); Missoula, Montana; and Canada (British Columbia and Alberta). Each geographic segment contained over 200 hundred respondents and together made up 20 percent of motorists traveling in Idaho for business and pleasure (Table 13 and 14). People in the sample traveling for daily affairs were not included in this analysis. Also, because travelers passing through Idaho made up a significant proportion of the sample of non-resident travelers, they were included in this analysis.

While differences were found among the six geographic segments, they had some common characteristics. Overall, it appears that most of the geographic segments had similar motivations. Traveling to be with family and friends, to learn and discover, and escape were shared among the segments. This in part may be due to the fact that most segments are from urban metro areas. Also, lifestyle cluster 7, mostly business travelers, was prevalent in all but one of the geographic segments.

The region of destination maps in Figure 1 show the differences in where geographic segments go when visiting Idaho. These maps highlight the dominant regions visited when travelers have an area in Idaho as a destination. These maps do not include travelers who only passed through Idaho. Also located on each map is the percent of travelers in each segment who have Idaho as a destination. Spokane and Salt Lake City (SLC) travelers contained the largest proportion of travelers having Idaho as a destination while the other geographic segments contained a large portion of travelers passing through Idaho (each over 50 percent).

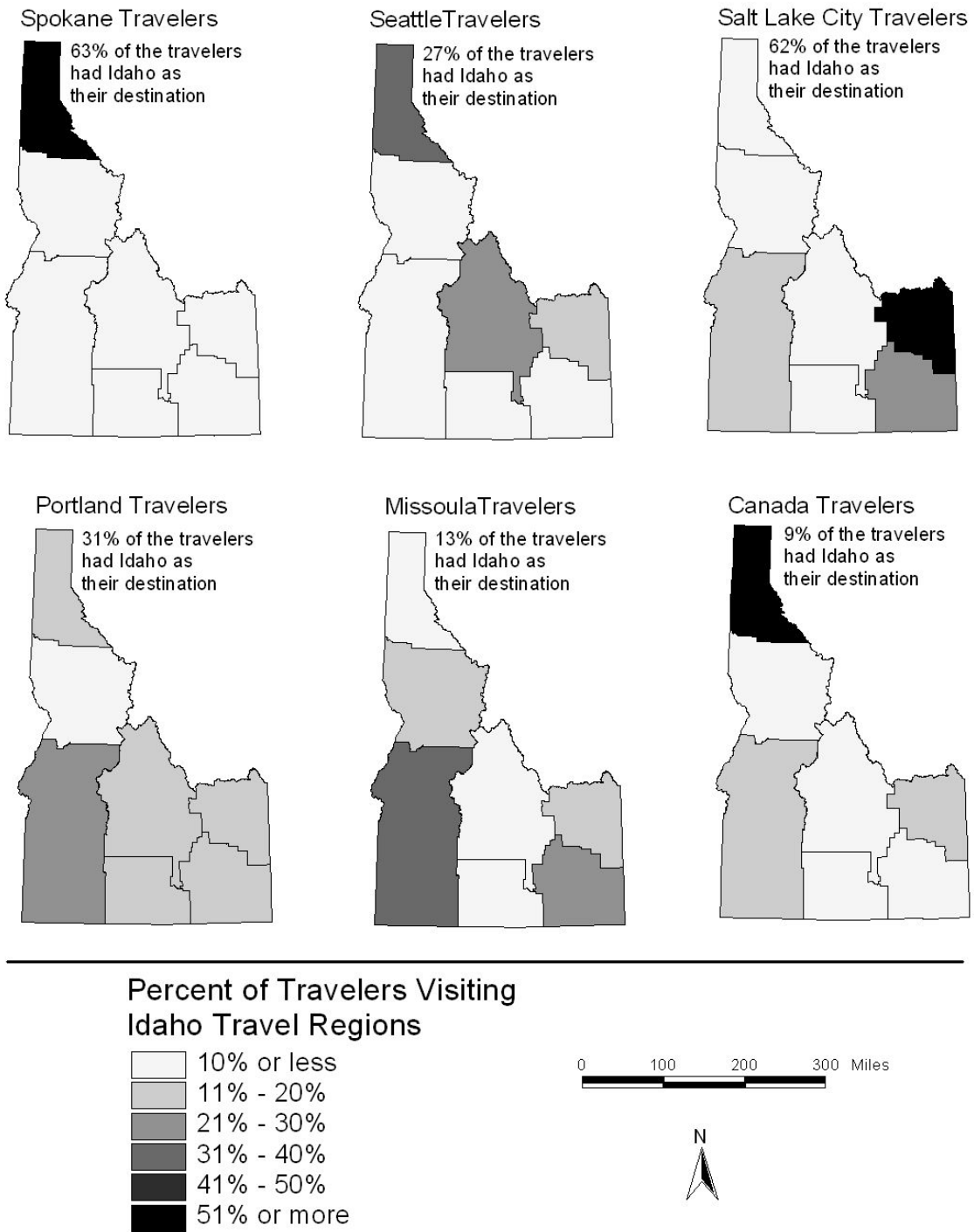


Figure 1. Idaho regional destinations of geographic origin segments. These data include nonresident travelers who had an area in Idaho as a destination. Travelers only passing through the state were not included.

Spokane and Canada travelers dominantly visited region 1 in north Idaho while Seattle travelers visited fairly evenly travel regions 1, 6, and 7. SLC travelers mostly visited travel region 6, followed by travel regions 5 and 3. Portland travelers were fairly evenly spread across all of Idaho's travel regions with slightly more visiting travel region 5. Most Missoula travelers visited travelers regions 2, 3, 5, and 6.

Figure 2 shows the major travel routes of motorists driving in Idaho from each geographic segment. Due to question response error (many respondents did not fill out this map question), these must be used cautiously. The data include travelers who stayed in Idaho for at least one night and either had an area in Idaho as a destination or were passing through the state. Highway use is classified into three categories (low, medium, and high) showing the percent distribution of motorists traveling in a particular area of Idaho.

Similar to patterns in Figure 1, most Spokane motorists used routes in travel region 1 (Figure 2). Salt Lake City and Portland travelers also had similar travel patterns between Figures 1 and 2. Differences in travel patterns for Canada travelers were found between the results displayed in Figures 1 and 2. While most Canada travelers who have Idaho as their destination travel to region 1 (Figure 1), a large proportion also travel through Idaho in regions 5 and 6 (Figure 2). Differences were also found between Figures 3 and 4 for the Missoula and Seattle travel segments. Not only do these patterns help better describe how motorists travel through Idaho, but they also suggest that some marketers can target travelers visiting their region while marketers in other regions may be able to tap into travelers passing through.

# Travel Patterns in Idaho of Geographic Market Segments

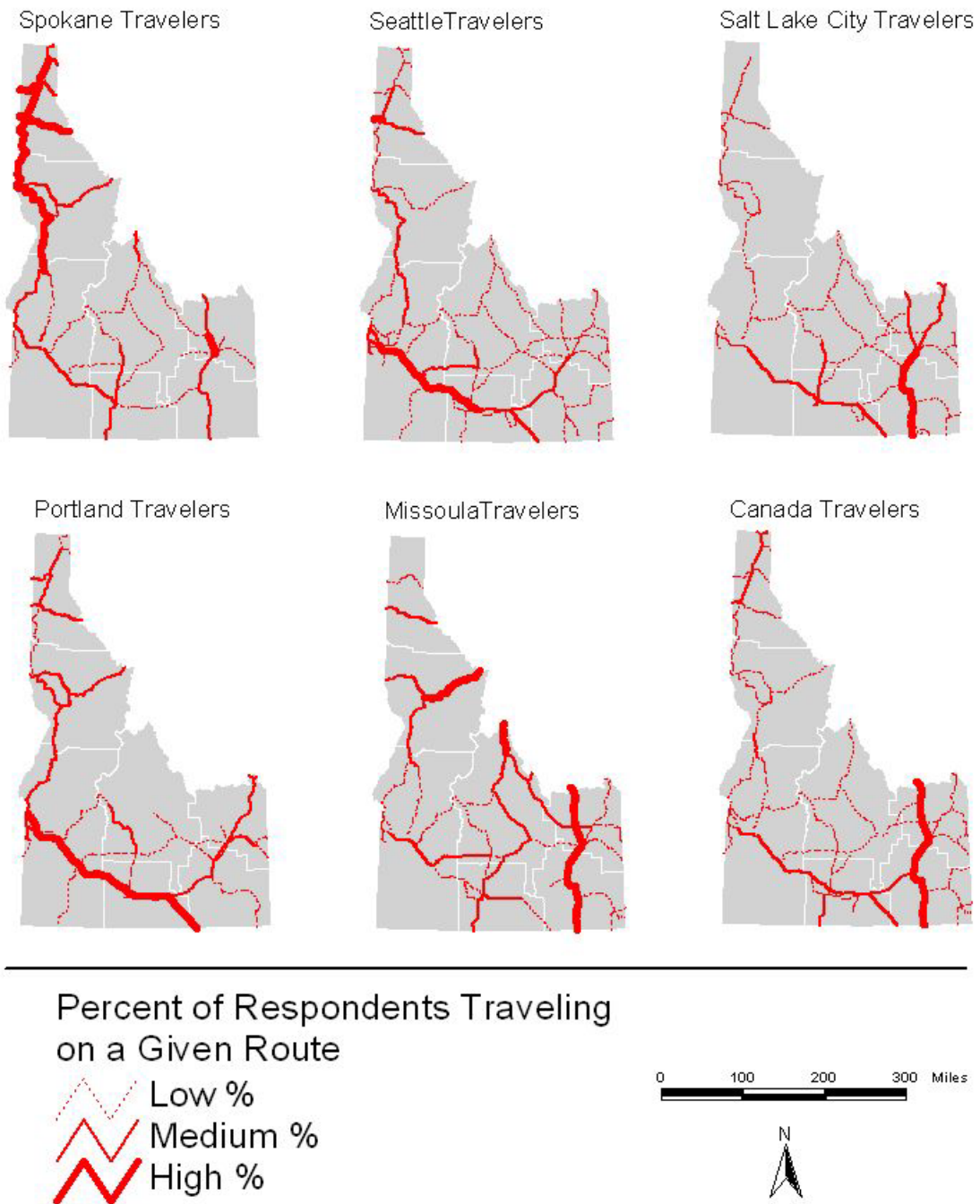


Figure 1. Travel patterns in Idaho of geographic market segments. These maps represent a proportion of the number of travelers within each geographic segment that traveled on the various roads in Idaho. These data include only nonresident travelers, who had either a destination in Idaho or were passing through, that stayed at least one night in the state.

Given the limitations associated with the data presented in Figure 2, in most cases maps show similar patterns thus allowing inferences to be made about their validity. For example, Figure 1 shows that most Spokane travelers visited travel region 1 and most SLC travelers visited travel regions 3, 5, and 6. While maps in Figure 1 were based on different variables than maps in Figure 2, a consistent pattern is present for both variables. Geographic segments that showed differences in travel patterns between the two figures are in part the result of the large percent of pass through travelers included in Figure 2.

Since many geographic segments contained a large proportion of travelers passing through Idaho, Table 13 shows in rank order which states pass-through travelers had as their destination. As seen in Figure 1, this table also shows that Idaho is the top destination for the Spokane and Salt Lake City segments. For northwest urban areas it is evident that Montana is clearly Idaho's competition. For Seattle, Portland, and Missoula travelers, Idaho was ranked second and third as a destination among a combination of western areas near Idaho (including Canada). The Canada travel segment stood out from other segments in that Idaho was ranked last and top destinations included predominantly southwestern states (Arizona, Nevada, California). This may be in part due to a presence of "snowbird" or RV travelers in the segment.

Below are descriptions of each geographic segment based on key profile variables (Tables 1-3).

### Spokane

Spokane travelers are motivated to travel in order to be with family and friends, and to learn and discover. The most dominant lifestyle clusters of these travelers are clusters 7, 1, and 6. A majority of Spokane travelers tend to make less than \$80,000 per year. Some 47 percent make less than \$40,000 per year and another 36 percent make between \$40,000 and \$80,000. There were almost equal proportions of full time and retired travelers.

Of the Spokane motorists traveling in Idaho, most reported Idaho as their primary destination (62 percent). However, many of these travelers did not stay in Idaho or stayed in Idaho for a short period of time. For example, 75 percent did not overnight in Idaho and 20 percent stayed 1 or 2 nights. Compared to travelers from other geographic origins, a larger proportion of business travelers were from Spokane (22 percent compared to 11 or 13 percent business travelers from other geographic market segments).

Like travelers from other geographic segments maps, printed media and roadside facilities were helpful travel information sources. Spokane travelers did not spend much time planning and preparing for trips to Idaho. Approximately 17 percent indicated they did no advance planning, while another 40 percent spent less than a week. While a majority of the Spokane travelers have internet access (64 percent) less than half (43 percent) use the internet to gather travel information about Idaho.

### Seattle

Lifestyle clusters 8, 6, and 7 are most prevalent in the Seattle market. They are somewhat older (mean age was 60 years) and have higher incomes than travelers from other geographic segments. Half of the Seattle motorists traveling in Idaho are retired. This segment contains the second largest percent of retirees compared to Canada market. Incomes were somewhat varied between travelers. 42 percent of Seattle travelers fell in the middle income bracket, while both the upper and lower income brackets each had 29 percent of the travelers.

Motorists from Seattle were dominantly traveling for pleasure (89 percent). Of the geographic segments, Seattle motorists contained the fewest traveling for business. Seattle motorists also contained the second largest percent of pass through travelers (73 percent). While there was a high percent of pass through travelers going to destinations in other states, over half overnights in Idaho during their trip. Of the 50 percent who stayed overnight, 26 percent stayed for one or two nights, 10

percent stayed for three nights, and another 15 percent stayed for four or more nights. Although many Seattle travelers passed through Idaho, a large percent stopped in Idaho on their way to other states.

Seattle travelers tend to plan their trip before coming to Idaho. The second largest percent of travelers planning between 1 and 6 months (relative to Portland travelers) were from the Seattle segment (58 percent). Only one percent or less indicated that they did not plan in advance. Seattle travelers also use computers and the web to help plan trips to Idaho. They indicated that using the computer was one of their most helpful travel information sources and that the web was a desired way to gather future travel information about Idaho. The largest percent of travelers who have internet access are from Seattle (75 percent), and over half use it to get travel information about Idaho.

### Portland

Lifestyle clusters 3, 1, and 6 are most prevalent in the Portland market. Portland travelers are unique from other geographic segments of travelers in that they have the largest proportion of first time visitors coming to Idaho (10 percent). Since their mean age is 62 years, they are the oldest group of travelers compared to other geographic segments. More than 60 percent of these travelers make between \$40,000 and \$80,000 annually. Although Portland had the highest mean age, less than half were retired (42 percent) while another 28 percent reported working full time.

Slightly less than half of all Portland motorists traveling to or through Idaho stayed over night in Idaho during their trip. Of those who overnight in Idaho, there appear to be two groups of travelers, those who stay for 1-2 nights (21 percent) and those who stay for 4 or more nights (19 percent). Although 87 percent were traveling for pleasure and 13 percent for business, almost 70 percent were passing through Idaho to another destination.

Portland travelers appeared to have the longest travel planning horizon. Only 1 percent of the travelers indicated that they did no advance planning, while 80 percent indicated they travel 1-6 months in advance. Like other segments, maps, roadside facilities, and printed media were their most helpful Idaho travel information sources. Also, a majority (69 percent) of travelers indicated that they have internet access while another 56 percent also use the internet to gather travel information about Idaho.

### Salt Lake City

Lifestyle clusters 6, 7, and 1 are most prevalent in the Salt Lake City (SLC) market. These travelers represent one of the youngest groups of nonresident motorists next to Missoula travelers. The mean age was 55 years for SLC travelers compared to 52 years for Missoula travelers. They also represent one of the wealthier segments of travelers. Only 12 percent indicated having incomes less than \$40,000, while 48 percent were in the middle bracket, and another 40 percent made more than \$80,000. Most of these travelers work full time (60 percent). Retired travelers made up 36 percent of SLC motorists, the second smallest proportion when compared to Missoula travelers.

Most SLC motorists who traveled in Idaho stayed over night. Less than half (46 percent) of SLC motorists did not overnight, while 54 percent stayed 1 or more nights. Pleasure travel was a dominant trip purpose while business travelers made up 13 percent of the motorists. Compared to other geographic segments, SLC motorist represented the second largest proportion of travelers having Idaho as their primary destination (61 percent). Also, these motorists predominantly visited the southern most regions of Idaho (travel regions 6, 5, and 3).

SLC travelers spend time planning their trips to Idaho, but do not have as long of a travel planning horizon as other geographic segments. Some 21 percent planned less than a week, 42 percent planned between 1-3 weeks in advance of their trip to Idaho, and 31 percent planned 1-6 months. SLC motorists rely on maps, word of



mouth, and printed media when traveling to Idaho. The future information sources they desired to use include the Web, collecting free brochures, and talking with friends. A large percent of travelers also have internet access (73 percent) and use the internet (56 percent) to gather travel information about Idaho.

### Missoula

Missoula motorists were motivated by opportunities to be with family, escape the usual demands of life and learn and discover. Lifestyle clusters 8, 7, and 2 were represented by the largest proportion of travelers in this segment. Missoula motorists also were the youngest groups of travelers in Idaho, with a mean age of 52 years. Over half of the motorists have an annual household income of \$40,000 to \$79,999, and another 28 percent make more than \$80,000. Compared to other geographic segments, the fewest retired travelers come from Missoula (26 percent).

Missoula travelers predominantly pass through Idaho to other destinations (87%). Similar to Spokane, Missoula motorists were one of the largest proportions of business travelers. When traveling in Idaho almost 80 percent of Missoula motorists do not overnight in the state. Of those who do, the largest percent stay for one or two nights. Five percent or less stay longer than two nights.

In comparison to other geographic market segments, the Missoula travelers planned the least. While only 2 percent indicated they do no advance planning, almost 60 percent planned less than one week. Their three most helpful Idaho travel information sources were similar to most other segments and consisted of maps, printed media, and roadside facilities. While 65 percent of Missoula motorists have internet access, only 41 percent use it to gather travel information about Idaho.

### Canada

Canada motorists traveling through Idaho represented one of the older groups and contained the largest proportion of retired travelers. They were motivated more than other segments by opportunities to learn and discover, be with family, and escape

the usual demands of life. Also, these travelers contained one of the larger proportions of travelers making less than \$40,000.

Only 9 percent of Canadian travelers had Idaho as their primary destination. However, a large proportion used Idaho as a stop-over point for 1 or 2 nights. Most Canadian motorists were traveling for pleasure and made up about the same percent of total non-resident travelers as other geographic segments.

Canadian travelers did not differ from other segments in their choice of information sources. A large proportion (98%) did however plan their trip in advance. While a large percent of travelers had internet access (67%), Canadians had the lowest percent (37%) of all geographic segments who use the internet for gathering travel information about Idaho.

Table 1. Validation and description of geographic origin market segments using traveler characteristics. These data represent all business and pleasure travelers visiting in or traveling through Idaho who may or may not have had an area in the state as their destination.

Traveler Characteristics	GEOGRAPHIC ORIGIN SEGMENT <sup>a</sup>						
	Overall <sup>b</sup>	Spokane WA (n = 334)	Seattle WA (n = 467)	Portland OR (n = 206)	Salt Lake City UT (n = 276)	Missoula MT (n = 343)	Canada-Alberta & B.C. (n = 293)
3 strongest travel motivations	Being with family	Being with family	Being with family	Being with family	Being with family	Being with family	<b>Learn &amp; discover</b>
	Learn & discover	Learn & discover	Learn & discover	<b>Being with friends</b>	Being with friends	Escape usual demands of life	Being with family
	Being with friends	Being with friends	<b>Being with friends</b>	Learn & discover	Change daily routine	Learn & discover	<b>Escape usual demands of life</b>
Dominant lifestyle clusters	1, 6, & 8	7, 1, & 6	8, 6, & 7	3, 1, & 6	6, 7, & 1	8, 7, & 2	8, 1, & 6
Percent first time visitors	11%	<b>1%</b>	4%	10%	6%	6%	9%
% who are male	65%	<b>77%</b>	63%	<b>78%</b>	66%	74%	65%
Mean age of respondents <sup>c</sup>	57 years	57 years	<b>60 years</b>	<b>62 years</b>	55 years	52 years	<b>61 years</b>
1998 Household Income							
< 39,999	31%	<b>47%</b>	29%	23%	<b>12%</b>	<b>20%</b>	<b>44%</b>
40,000-79,999	44%	36%	42%	<b>63%</b>	48%	<b>52%</b>	38%
> 80,000	25%	17%	29%	<b>14%</b>	<b>40%</b>	28%	18%
Employment							
Full time	42%	46%	<b>30%</b>	<b>28%</b>	<b>60%</b>	46%	<b>30%</b>
Retired	42%	43%	50%	42%	36%	<b>26%</b>	<b>67%</b>

<sup>a</sup> Significant departures from overall sample characteristics are shown in bold

<sup>b</sup> Characteristics of the entire sample of nonresident business and pleasure travelers (including the six geographic origin segments)

<sup>c</sup> Includes only licensed drivers over the age of 14 who completed a questionnaire

Table 2. Validation and description of geographic origin market segments using trip characteristics. These data represent all business and pleasure travelers visiting in or traveling through Idaho who may or may not have had an area in the state as their destination.

Trip Characteristics	GEOGRAPHIC ORIGIN SEGMENT <sup>a</sup>						
	Overall <sup>b</sup>	Spokane WA	Seattle WA	Portland OR	Salt Lake City UT	Missoula MT	Canada
Length of stay in Idaho							
Did not overnight	52%	<b>75%</b>	50%	53%	46%	<b>79%</b>	48%
1-2 nights	26%	20%	26%	21%	32%	<b>13%</b>	<b>45%</b>
3 nights	6%	1%	10%	7%	10%	5%	2%
4 or more	16%	<b>4%</b>	15%	19%	13%	<b>3%</b>	<b>2%</b>
Median length of stay for travelers who overnighted	2 nights	2 nights	2 nights	3 nights	2 nights	2 nights	1 night
Travel Region of Destination							
	Region 1	Region 1	Region 1	Region 3	Region 6	Region 3	Region 1
	Region 6	Region 3	Region 7	Region 5	Region 5	Region 5	Region 3
	Region 3	Region 4	Region 6	Region 7	Region 3	Region 2	Region 6
Trip Purpose							
Business	15%	22%	11%	13%	13%	22%	<b>9%</b>
Pleasure	85%	78%	89%	87%	87%	78%	91%
Travel Pattern							
Nonresident visitor	36%	<b>62%</b>	27%	31%	<b>61%</b>	<b>13%</b>	<b>9%</b>
Nonresident pass through	64%	<b>38%</b>	73%	69%	<b>39%</b>	<b>87%</b>	<b>91%</b>
Top 4-6 destinations							
	N/A	Idaho	Montana	Montana	Idaho	Washington	Arizona
		Montana	Idaho	Idaho	Montana	Utah	Nevada
		California	Wyoming	Utah/Wyoming	Wyoming	Idaho	California
		Utah	Utah	Colorado/Nevada	Canada	Oregon/Calif.	Idaho
Percent of total nonresident travelers	60% of business & pleasure travelers are nonresident	4%	5%	2%	3%	4%	3%

<sup>a</sup> Significant departures from overall sample characteristics are shown in bold

<sup>b</sup> Characteristics of the entire sample of nonresident business and pleasure travelers

Table 3. Validation and description of geographic origin market segments using trip planning characteristics. These data represent all business and pleasure travelers visiting in or traveling through Idaho who may or may not have had an area in the state as their destination.

Trip Planning Characteristics	GEOGRAPHIC ORIGIN SEGMENT <sup>a</sup>						
	Overall <sup>b</sup>	Spokane WA	Seattle WA	Portland OR	Salt Lake City UT	Missoula MT	Canada
3 most helpful Idaho travel information sources	Maps	Maps	Maps	Maps	Maps	Maps	Maps
	Printed media	Printed media	Printed media	Roadside facilities	Word of mouth	Printed media	Printed media
	Roadside facilities	Roadside facilities	Computer	Printed media	Printed media	Roadside facilities	Roadside facilities
3 most desired future Idaho travel information sources	Free brochures & pamphlets	Free brochures & pamphlets	Free brochures & pamphlets	Free brochures & pamphlets	Web or email	Talk with friends & relatives	Free brochures & pamphlets
	Web or email	Web or email	Talk with friends & relatives	Talk with friends & relatives	Free brochures & pamphlets	Free brochures & pamphlets	Web or email
	Talk with friends & relatives	Talk with friends & relatives	Web or email	Web or email	Talk with friends & relatives	Ask questions in person	Ask questions in person
Travel planning horizon							
No advanced planning	3%	<b>17%</b>	1%	1%	7%	2%	2%
Less than 1 week	20%	<b>40%</b>	17%	<b>5%</b>	21%	<b>59%</b>	25%
1-3 weeks	52%	<b>21%</b>	<b>23%</b>	<b>13%</b>	<b>42%</b>	<b>27%</b>	<b>22%</b>
1-6 months	25%	23%	<b>58%</b>	<b>80%</b>	31%	<b>12%</b>	<b>48%</b>
Percent with internet access	68%	<b>64%</b>	<b>75%</b>	69%	73%	65%	67%
Percent who use the internet to get travel information	53%	<b>43%</b>	52%	56%	56%	<b>41%</b>	<b>37%</b>

<sup>a</sup> Significant departures from overall sample characteristics are shown in bold

<sup>b</sup> Characteristics of the entire sample of nonresident business and pleasure travelers