

# *2017 Region and MSA Visitor Profile*

## *Hill Country Region*

*INSIGHTS  
THAT TAKE  
YOU  
PLACES*

**DKSHIFFLET**

## Hill Country Tourism Region



# Hill Country Region Executive Summary

## Volume/Share

The Hill Country Tourism Region contains 29 counties and the following MSAs: Austin-Round Rock

The number of Person-Stays to the Hill Country Region was estimated at 34.08 million in 2017, and the volume of Person-Days was estimated at 65.46 million.

The Hill Country Region's share of total Person-Stays to Texas ranked 4 out of the 7 Texas Tourism Regions.

### Hill Country Volume (millions)

Person-Days	Total	Leisure	Business
2017	65.46	47.81	17.64
2016	61.86	44.81	17.05
2015	59.62	42.78	16.84
2014	57.16	40.83	16.34
2013	55.24	39.19	16.05
Person-Stays	Total	Leisure	Business
2017	34.08	24.00	10.08
2016	31.96	22.26	9.70
2017	30.11	20.73	9.38
2014	28.40	19.62	8.77
2013	30.11	20.73	9.38

### Hill Country Share of Texas Travel

Person-Days	Total	Leisure	Business
2017	13.2%	13.0%	13.8%
2016	11.6%	11.1%	13.0%
2015	11.5%	11.4%	11.9%
2014	10.7%	10.3%	11.8%
2013	10.5%	10.2%	11.3%

## Hill Country Tourism Region

REGION			REGION	
Top Origin DMAs (Person-Stays)			Top Origin DMAs (Person-Stays)	
In State DMAs			Out-of-State DMAs	
Total Texans (Intrastate)	83.1%		Total Non-Texans (Interstate)	16.9%
San Antonio	18.8%		San Francisco-Oakland-San Jose, CA	1.4%
Houston	18.5%		New York, NY	1.0%
Austin	17.3%		Lincoln & Hastings-Kearney, NE	0.8%
Dallas-Fort Worth	12.7%		Los Angeles, CA	0.8%
Waco-Temple-Bryan	4.1%		Boston, MA (Manchester, NH)	0.7%
Harlingen-Weslaco-Brownsville-McAllen	2.2%		Denver, CO	0.6%
Corpus Christi	2.0%		Portland, OR	0.6%
San Angelo	1.8%		St. Louis, MO	0.5%

## Hill Country Tourism Region

REGION		REGION	
Purpose of Stay (Person-Stays)		Purpose of Stay (Person--Stays)	
<b>Total Leisure</b>	<b>76.8%</b>	<b>Total Business</b>	<b>23.2%</b>
<b>Vacation</b>	<b>21.9%</b>	<b>Meetings</b>	<b>11.3%</b>
Getaway Weekend-Overnight	8.5%	Seminar/Training	5.5%
Day Trip Vacation/Getaway	7.9%	Convention	2.4%
General Vacation-Overnight	5.5%	Other Group Meeting	3.5%
<b>Non-Vacation</b>	<b>54.9%</b>	<b>Transient</b>	<b>11.9%</b>
Visit Friend/Relative	26.2%	Consulting/Client Service	4.0%
Special Event (celebration, reunion)	9.7%	Sales/Purchasing	1.9%
Medical/Health Care	3.0%	Construction/Repair	1.4%
Convention/Show/Conference	2.3%	Inspection/Audit	0.8%
Seminar/Class/Training (personal)	1.2%	Government/Military	0.4%
Other Leisure/Personal	12.5%	Other Business	3.4%

## Hill Country Tourism Region

REGION		REGION	
Activities Summary (Stays)			
Attractions (Net)	19.4%	Nature (Net)	16.7%
Nightlife (bar, nightclub, etc.)	13.4%	Parks (national/state, etc.)	11.1%
Show: Boat/Home	3.0%	Wildlife Viewing (birds, whales etc.)	3.1%
Amateur Sports (attend/participate)	2.6%	Beach/Waterfront	2.7%
Culture (Net)	31.5%	Outdoor Sports (Net)	9.8%
Historic Sites	10.0%	Hiking	3.8%
Festival/Fairs (state, craft, etc.)	8.7%	Biking	1.7%
Touring/Sightseeing	8.2%	Boating/Sailing	1.6%
Family/Life Events (Net)	38.9%	General (Net)	36.9%
Visit Friends/Relatives (general visit)	29.3%	Shopping	22.3%
Personal Special Event (Anniversary, Birthday)	6.0%	Business	6.7%
Holiday Celebration (Thanksgiving, July 4th etc.)	5.8%	Religious/Faith Based Conference	2.6%
Libation and Culinary (Net)	29.7%	Trip Party Composition (Trip-Days)	
Culinary/Dining Experience	28.4%	Avg. Party Size (Adults and Children)	1.71 persons
Winery/Distillery/Brewery Tours	3.9%	One Male Only	28.9%
		One Female Only	22.0%
		One Male and One Female	31.1%
		Two Male or Two Females	5.8%
		Three or More Adults	4.8%
		Adult(s) with Children	7.5%

## Hill Country Tourism Region

REGION			REGION	
Length of Stay (Stays)			Accommodation Type (Person-Stays)	
<b>Average Length (Incl. Days)</b>	<b>1.87</b>	<b>days</b>	<b>Paid Accommodations</b>	<b>61.5%</b>
<b>Average Length (Overnight Only)</b>	<b>2.4</b>	<b>nights</b>	Hotel/Motel	48.0%
Day –Trips	53.3%		High-End	13.9%
1-3 Nights	37.9%		Mid-Level	23.3%
4-7 Nights	7.8%		Economy	9.3%
8+ Nights	1.0%		Other Hotel/Motel	1.5%
<b>Primary Mode of Transportation (Person-Stays)</b>			Non-Hotel/Motel	13.5%
<b>Air</b>	<b>7.4%</b>		<b>Non-Paid Accommodations</b>	<b>37.8%</b>
<b>Auto Travel (Net)</b>	<b>90.5%</b>		<b>Other Overnight</b>	<b>0.6%</b>
<b>Other Transportation (Net)</b>	<b>2.1%</b>			
Bus	1.8%			
Train	0.1%			
Other	0.2%			
<b>Distance Traveled One-Way from Home (Person-Stays)</b>				
<b>Average Distance Traveled</b>	<b>277</b>	<b>miles</b>		
250 Miles or Less	78.6%			
251-500 Miles	5.3%			
500-1000 Miles	6.9%			
1001 Miles or More	9.2%			

## Hill Country Tourism Region

REGION		REGION	
Expenditure Summary (Person-Days)		Expenditure Summary (Person-Days)	
<b>Transportation - Total</b>	<b>30.0%</b>	<b>Avg. Per Person Per Day Spending</b>	<b>\$130.80</b>
Transportation - Excluding Airfare	19.4%	<b>Transportation - Total</b>	<b>\$39.20</b>
Transportation - Airfare	10.6%	Transportation - Excluding Airfare	\$25.40
Transportation - Rental Car	4.7%	Transportation - Airfare	\$85.00
Transportation - Other	14.7%	Transportation - Rental Car	\$44.10
<b>Food</b>	<b>26.7%</b>	Transportation - Other	\$19.20
<b>Lodging - Total</b>	<b>18.3%</b>	<b>Food</b>	<b>\$35.00</b>
Lodging - Room	17.1%	<b>Lodging - Total</b>	<b>\$57.00</b>
Lodging - Services	1.2%	Lodging - Room	\$60.80
<b>Shopping</b>	<b>14.8%</b>	Lodging - Services	\$4.70
<b>Entertainment</b>	<b>7.5%</b>	<b>Shopping</b>	<b>\$19.40</b>
<b>Miscellaneous</b>	<b>2.7%</b>	<b>Entertainment</b>	<b>\$9.80</b>
		<b>Miscellaneous</b>	<b>\$3.50</b>

Data on expenditures represent direct spending per person per day for six expenditure categories (transportation, food/drink, entertainment, shopping, accommodations, and other miscellaneous expenditures) separately and in total. Individual category spending is based on reported spending at least \$1. Total spending is based on reported spending of at least \$1 in any given category, but not necessarily all categories. For this reason the individual categories can not simply be summed to arrive at the total spending figure. Expenditure information is critical in assessing the direct economic impact of visitors and this method of calculating spending averages by eliminating "\$0" spending for a category provides a more accurate estimate of category spend as well as total spending.



## Hill Country Tourism Region

REGION			REGION	
Demographic Profile (Person-Stays)				
Average Age		46.5	Employment	
	18-34 Years	28.1%	Employed	71.2%
	35-49 Years	30.3%	Retired	16.2%
	50-64 Years	26.4%	Not Employed	12.5%
	65+ Years	15.3%		
Marital Status				
Average HH Income		\$105,693	Married	65.8%
	Under \$25,000	8.3%	Never Married	25.7%
	\$25,000-\$49,999	17.3%	Divorced/Widowed	8.5%
	\$50,000-\$74,999	15.7%		
	\$75,000-\$99,999	16.4%	Children in Household	
	\$100,000-\$149,999	19.2%	Yes	31.8%
	\$150,000 +	23.2%	No	68.2%

## **Austin-Round Rock, TX MSA**

## Austin-Round Rock, TX MSA Executive Summary

### Volume/Share

The number of Person-Stays to the Austin-Round Rock MSA was estimated at 27.41 million in 2017, and the volume of Person-Days was estimated at 53.58 million.

The Austin-Round Rock MSA's share of total Person-Stays to Texas ranked 4 out of 26 Texas MSAs.

### Austin-Round Rock, TX MSA Volume (millions)

Person-Days	Total	Leisure	Business
2017	53.58	37.20	16.39
2016	50.27	34.43	15.84
2015	48.18	32.58	15.59
2014	45.55	30.54	15.01
2013	43.69	29.17	14.53
Person-Stays	Total	Leisure	Business
2017	27.41	18.43	8.98
2016	25.61	16.88	8.73
2015	24.11	15.58	8.53
2014	22.62	14.70	7.92
2013	21.54	14.09	7.45

### Austin-Round Rock, TX MSA Share of Texas Travel

Person-Days	Total	Leisure	Business
2017	10.33%	9.6%	13.15%
2016	9.6%	9.0%	11.7%
2015	9.3%	8.7%	11.3%
2014	8.9%	8.2%	10.8%
2013	8.7%	8.0%	10.5%

## Austin-Round Rock MSA

MSA			MSA		
Top Origin DMAs (Person-Stays)			Top Origin DMAs (Person-Stays)		
In State DMAs			Out-of-State DMAs		
Total Texans (Intrastate)			Total Non-Texans (Interstate)		
	Houston	21.1%		San Francisco-Oakland-San Jose, CA	1.7%
	Austin	16.0%		New York, NY	1.3%
	Dallas-Fort Worth	14.1%		Los Angeles, CA	0.9%
	San Antonio	13.9%		Boston, MA (Manchester, NH)	0.8%
	Waco-Temple-Bryan	4.6%		Denver, CO	0.7%
	Harlingen-Weslaco-Brownsville-McAllen	2.7%		Portland, OR	0.7%
	Corpus Christi	2.5%		St. Louis, MO	0.6%
	Victoria	1.8%		Chicago, IL	0.6%

## Austin-Round Rock MSA

MSA		MSA	
Purpose of Stay (Person-Stays)		Purpose of Stay (Person-Stays)	
<b>Total Leisure</b>	<b>74.1%</b>	<b>Total Business</b>	<b>25.9%</b>
<b>Vacation</b>	<b>19.6%</b>	<b>Meetings</b>	<b>14.0%</b>
Getaway Weekend-Overnight	7.8%	Seminar/Training	14.0%
General Vacation-Overnight	5.9%	Convention	6.7%
Day Trip Vacation/Getaway	5.8%	Other Group Meeting	2.9%
<b>Non-Vacation</b>	<b>54.4%</b>	<b>Transient</b>	<b>12.0%</b>
Visit Friend/Relative	28.3%	Consulting/Client Service	5.0%
Special Event (celebration, reunion)	10.6%	Sales/Purchasing	2.4%
Medical/Health Care	2.6%	Construction/Repair	1.1%
Convention/Show/Conference	2.3%	Inspection/Audit	0.5%
Seminar/Class/Training (personal)	1.4%	Government/Military	0.5%
Other Leisure/Personal	9.1%	Other Business	2.5%

## Austin-Round Rock MSA

MSA		MSA	
Activities Summary (Stays)			
Attractions (Net)	20.2%	Nature (Net)	14.8%
Nightlife (bar, nightclub, etc.)	15.3%	Parks (national/state, etc)	9.6%
Amateur Sports (attend/participate)	2.2%	Eco/Sustainable Travel	2.9%
Show: Boat, Car, Home	1.9%	Beach/Waterfront	2.2%
Culture (Net)	30.5%	Outdoor Sports (Net)	8.5%
Live Music (festivals/concerts/clubs)	11.7%	Hiking	2.9%
Historic Sites	9.8%	Boating/Sailing	1.8%
Festival/Fairs (state, craft, etc.)	7.8%	Biking	1.8%
Family/Life Events (Net)	39.1%	General (Net)	34.4%
Visit Friends/Relatives (general visit)	28.6%	Shopping	19.3%
Personal Special Event (Anniversary, Birthday)	5.9%	Business	7.8%
Holiday Celebration (Thanksgiving, July 4th etc.)	5.5%	Religious/Faith Based Conference	2.4%
Libation and Culinary (Net)	27.8%	Trip Party Composition (Trip-Days)	
Culinary/Dining Experience	27.0%	Avg. Party Size (Adults and Children)	1.64 persons
Winery/Distillery/Brewery Tours	3.%	One Male Only	32.1%
		One Female Only	23.2%
		One Male and One Female	27.5%
		Two Male or Two Females	5.8%
		Three or More Adults	4.6%
		Adults with Children	6.8%

## Austin-Round Rock MSA

MSA			MSA	
Length of Stay (Stays)			Accommodation Type (Person-Stays)	
<b>Average Length (Incl. Days)</b>	<b>1.94</b>	<b>days</b>	<b>Paid Accommodations</b>	<b>62.6%</b>
<b>Average Length (Overnight Only)</b>	<b>2.47</b>	<b>nights</b>	Hotel/Motel	50.9%
Day –Trips	52.0%		High-End	16.4%
1-3 Nights	38.5%		Mid-Level	24.9%
4-7 Nights	8.2%		Economy	8.1%
8+ Nights	1.3%		Other Hotel/Motel	1.5%
<b>Primary Mode of Transportation (Person-Stays)</b>			Non-Hotel/Motel	11.7%
Air	9.3%		<b>Non-Paid Accommodations</b>	<b>36.6%</b>
Auto Travel (Net)	88.2%		<b>Other Overnight</b>	<b>0.7%</b>
Other Transportation (Net)	2.5%			
Bus	2.2%			
Train	0.2%			
Other	0.2%			
<b>Distance Traveled One-Way from Home (Person-Stays)</b>				
<b>Average Distance Traveled</b>	<b>305</b>	<b>miles</b>		
250 Miles or Less	76.3%			
251-500 Miles	5.4%			
500-1000 Miles	7.7%			
1001 Miles or More	10.6%			

## Austin-Round Rock MSA

MSA		MSA	
Expenditure Summary (Person-Stays)		Expenditure Summary (Person-Stays)	
<b>Transportation - Total</b>	<b>31.7%</b>	<b>Avg. Per Person Per Day Spending</b>	<b>\$136.40</b>
Transportation - Excluding Airfare	19.4%	<b>Transportation - Total</b>	<b>\$43.30</b>
Transportation - Airfare	12.3%	Transportation - Excluding Airfare	\$26.50
Transportation - Rental Car	5.0%	Transportation - Airfare	\$87.40
Transportation - Other	14.4%	Transportation - Rental Car	\$43.50
<b>Food</b>	<b>26.2%</b>	Transportation - Other	\$19.60
<b>Lodging - Total</b>	<b>19.3%</b>	<b>Food</b>	<b>\$35.80</b>
Lodging - Room	17.9%	<b>Lodging - Total</b>	<b>\$62.80</b>
Lodging - Services	1.4%	Lodging - Room	\$67.90
<b>Shopping</b>	<b>12.6%</b>	Lodging - Services	\$5.70
<b>Entertainment</b>	<b>7.6%</b>	<b>Shopping</b>	<b>\$17.20</b>
<b>Miscellaneous</b>	<b>2.5%</b>	<b>Entertainment</b>	<b>\$10.30</b>
		<b>Miscellaneous</b>	<b>\$3.40</b>

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## Austin-Round Rock MSA

MSA			MSA	
Demographic Profile (Person-Stays)				
Average Age	45.1		Employment	
	18-34 Years	30.3%	Employed	74.6%
	35-49 Years	32.5%	Retired	12.2%
	50-64 Years	24.2%	Not Employed	13.2%
	65+ Years	12.9%		
Marital Status				
Average HH Income	\$105,779		Married	63.1%
	Under \$25,000	9.6%	Never Married	28.8%
	\$25,000-\$49,999	17.5%	Divorced/Widowed	8.1%
	\$50,000-\$74,999	15.2%		
	\$75,000-\$99,999	15.2%	Children in Household	
	\$100,000-\$149,999	18.4%	Yes	34.3%
	\$150,000+	24.1%	No	65.7%

## Statistical References

### Confidence Interval

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage Findings in Report or Data Tables as follows:

Total Travel	Sample Size for 2017	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
Total Texas	5,653	0.2%	0.4%	0.6%	0.8%	1.1%
Hill Country Region	2,327	0.3%	0.6%	0.9%	1.3%	1.7%
Austin-Round Rock, TX MSA	2,068	0.4%	0.7%	0.9%	1.4%	1.8%