

2006 Delaware Visitor Profile

(Based on results of TravelScope® and TIA TravelScope/Directions® by
DKS&A)

**Kent County
New Castle County
Sussex County**



Delaware Economic Development Office
Industry Research Section
November 2007

www.dedo.delaware.gov
www.visitdelaware.com

2006 Delaware Visitor Profile Study

INTRODUCTION	3
EXECUTIVE SUMMARY	4
VISITOR VOLUME	7
Quarterly and Monthly Visitor Volume	8
Business and Leisure Visitor Volume.....	9
Top States of Origin	10
TRIP CHARACTERISTICS	12
Primary Mode of Transportation	14
Trip Duration.....	16
Lodging Use.....	18
Travel Party Size	19
Activities	22
Trip Spending	24
DEMOGRAPHICS	26
Education of Delaware Visitors	27
Occupation of Delaware Visitors	289
Employment Delaware Visitors	301
Income of Delaware Visitors	323
METHODOLOGY	36
GLOSSARY OF TERMS	37

INTRODUCTION

The following visitor profile for Delaware focuses exclusively on tourism which includes 2005 and 2006 comparative data for Kent County, New Castle County, and Sussex County. Using TIA TravelScope®/DIRECTIONS® by DKS&A, a product of the Travel Industry Association of America (TIA) in partnership with the D.K. Shifflet and Associates, Ltd. and discussed further in the Methodology section, the following visitor profile was developed for Delaware's three counties. The 2006 Delaware Travel Barometer, provided by TIA, includes information exclusively on Delaware, and can be found at <http://dedo.delaware.gov/DEBarometer06.pdf>

- In some instances, data is presented annually as well as quarterly to demonstrate the seasonality associated with tourism and tourism activities.
- The study is limited to the following three major focus areas:
 1. Visitor Volume;
 2. Trip Characteristics;
 3. Demographics.

Appendix A consists of the survey methodology. Appendix B provides a Glossary of Terms.

Please be cautious in analyzing/interpreting the data in the following profile, as the numbers are based on small sample sizes.

EXECUTIVE SUMMARY

2006

Total number of projected person-trips

- ❖ Kent County – 2.69 million
 - ❖ New Castle County – 2.38 million
 - ❖ Sussex County – 3.02 million
-

Overnight / Day Trips

- ❖ Forty-six percent of Kent County person-trips were overnight; 54% were day trips
 - ❖ Thirty-nine percent of New Castle County person-trips were overnight; 61% were day trips
 - ❖ Sixty-three percent of Sussex County person-trips were overnight; 37% were day trips
-

Leisure / Business Trips

- ❖ Eighty-seven percent of Kent County person-trips were leisure; 13% was business
 - ❖ Seventy-two percent of New Castle County person-trips were leisure; 28% was business
 - ❖ Eighty-three percent of Sussex County person-trips were leisure; 17% was business
-

Top states of origin (other than Delaware)

- ❖ Kent County – Maryland (21%); Virginia (10%); Pennsylvania (9%)
 - ❖ New Castle County - New Jersey (32%); Pennsylvania (15%); Maryland (15%)
 - ❖ Sussex County – Maryland (25%); Pennsylvania (19%); New Jersey (10%)
-

Primary Purpose of Trip

- ❖ Kent County – other leisure (51%); visit friends or relatives (14%); general vacation (13%)
 - ❖ New Castle County – other leisure (32%); visit friends or relatives (26%); other business (21%)
 - ❖ Sussex County – getaway weekend (28%); visit friends or relatives (21%); general vacation (19%)
-

Mode of Transportation:

- ❖ Personal auto travel remained the dominant form of transportation to Delaware's counties
 - Kent County – 86%
 - New Castle – 83%
 - Sussex County – 80%
-

Trip Duration:

- ❖ Kent County overnight person-trips – one night (20%); two nights (14%); three or more nights (12%)
 - ❖ New Castle County overnight person-trips – one night (12%); two nights (11%); three or more nights (16%)
 - ❖ Sussex County overnight person trips – one night (14%); two nights (20%); three or more nights (29%)
-

Lodging

- ❖ Seventy-seven percent of overnight visits to Kent County included a stay in a hotel, motel, resort, or all suite motel; 10% stayed in a private home
 - ❖ Forty-eight percent of overnight visits to New Castle County included a stay in a hotel, motel, resort, or all suite motel; 47% stayed in a private home
 - ❖ Thirty-two percent of overnight visits to Sussex County included a stay in a hotel, motel, resort, or all suite motel; 43% stayed in a private home
-

Activities on a Trip

- ❖ Kent County – gambling (39%); dining (35%); entertainment (30%)
 - ❖ New Castle County – shopping (28%); dining (25%); touring/sightseeing (19%)
 - ❖ Sussex County – beach/waterfront (43%); dining (40%); shopping (33%)
-

Number of Persons on a Trip

- ❖ Kent County – two people (52%); one person (30%); three people (10%)
 - ❖ New Castle County – one person (44%); two people (39%); over four people (9%)
 - ❖ Sussex County – one person (36%); two people (31%); over four people (20%)
-

Expenditures (total trip spending mean)

- ❖ Kent County – \$289
 - ❖ New Castle County – \$270
 - ❖ Sussex County – \$436
-

Education of Respondents/Visitors

- ❖ Kent County – graduated high school (47%); attended college (27%); college post grad (13%); graduated college (9%)
 - ❖ New Castle County – graduated high school (32%); graduated college (26%); college post grad (22%); attended college (19%)
 - ❖ Sussex County – graduated high school (34%); attended college (27%); graduated college (21%); college post grad (16%)
-

Occupation of Respondents/Visitors

- ❖ Kent County – retired/student/other (46%); manager/prof (21%); tech/sales/admin (18%); service (7%); craftsman/repairman (4%); operator/laborer (4%)
 - ❖ New Castle County – retired/student/other (38%); manager/prof (27%); tech/sales/admin (17%); service (8%); craftsman/repairman (6%); operator/laborer (3%)
 - ❖ Sussex County – manager/prof (30%); retired/student/other (29%); tech/sales/admin (27%); service (7%); operator/laborer (5%); craftsman/repairman (1%)
-

Employment of Visitors

- ❖ Kent County – full-time (49%); retired (32%); part-time (10%); not employed (9%)
 - ❖ New Castle County – full-time (69%); retired (18%); not employed (9%); part-time (3%)
 - ❖ Sussex County – full-time (63%); retired (17%); part-time (12%); not employed (9%)
-

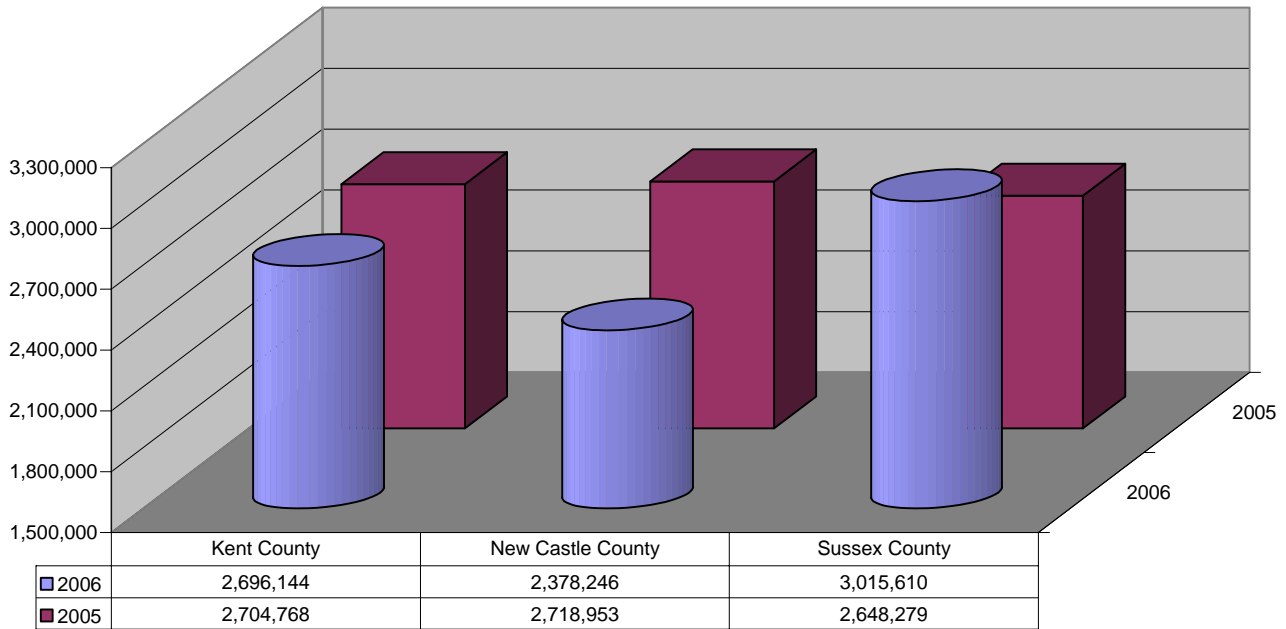
Income of Visitors (household income)

- ❖ Kent County – over \$75,000 (34%); \$50,000-\$74,999 (27%); \$25,000-\$49,999 (27%); under \$25,000 (12%)
- ❖ New Castle County – over \$75,000 (43%); \$50,000-\$74,999 (38%); \$25,000-\$49,999 (15%); under \$25,000 (4%)
- ❖ Sussex County – over \$75,000 (49%); \$25,000-\$49,999 (23%); \$50,000-\$74,999 (12%); under \$25,000 (5%)

VISITOR VOLUME

The total number of projected person-trips to Delaware in 2006 was 8.09 million, a slight increase from 2005 - 8.07 million projected person-trips. The data suggests that Sussex County had a 14% increase, while Kent and New Castle County declined.

**Visitor Volume
2005-2006**



Quarterly and Monthly Visitor Volume

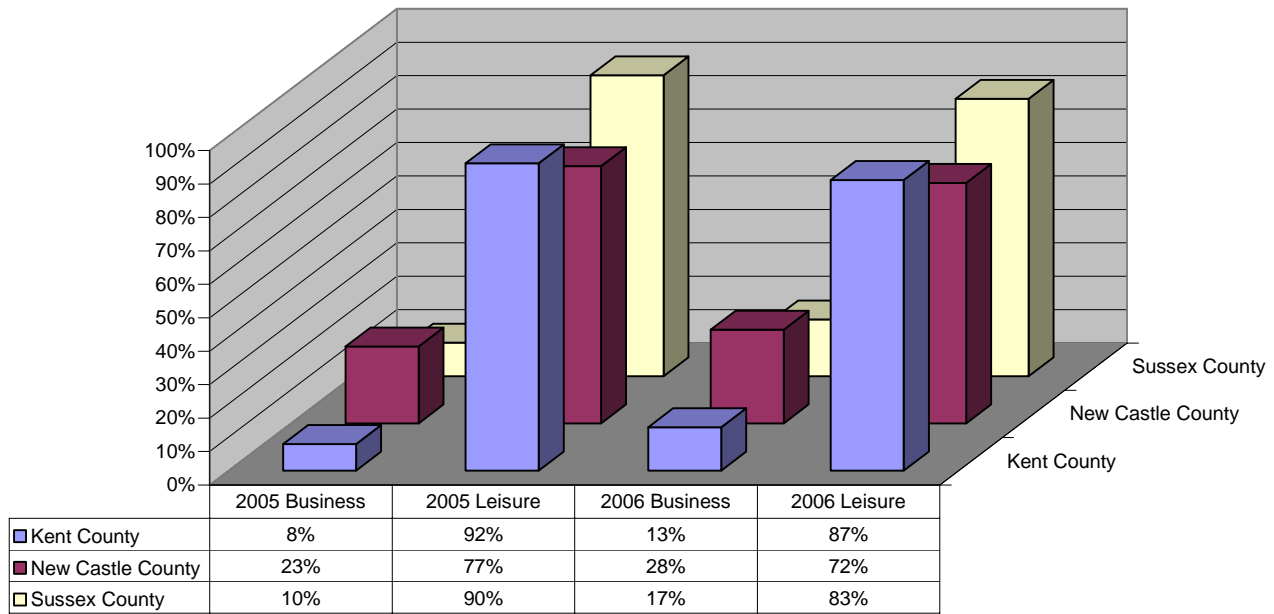
The third quarter (the quarter the trip started), including the months of July, August, and September, was the most popular quarter for visitors to Delaware. July was the highest month of travel (month trip started) for Kent County and Sussex County, and November was highest month of travel for New Castle County.

Timeframe	Kent County		New Castle County		Sussex County	
	2005	2006	2005	2006	2005	2006
Quarter 1 (Jan., Feb., Mar.)	26%	28%	21%	24%	10%	12%
Quarter 2 (Apr., May, Jun.)	22%	20%	17%	18%	31%	23%
Quarter 3 (Jul., Aug., Sep.)	31%	32%	22%	21%	35%	50%
Quarter 4 (Oct., Nov., Dec.)	20%	20%	40%	37%	24%	16%
January	2%	10%	11%	7%	3%	3%
February	13%	11%	3%	8%	2%	5%
March	11%	7%	8%	9%	5%	4%
April	4%	4%	6%	7%	12%	8%
May	8%	6%	6%	7%	11%	8%
June	10%	10%	5%	4%	8%	7%
July	15%	14%	8%	9%	20%	21%
August	8%	10%	8%	6%	10%	16%
September	9%	8%	6%	6%	5%	12%
October	2%	3%	13%	9%	6%	4%
November	13%	7%	25%	22%	13%	6%
December	5%	10%	2%	6%	5%	6%

Business and Leisure Visitor Volume

A total of 6.2 million leisure person-trips and 1.9 million business person-trips were taken to Delaware in 2006. Business travel increased in each county while leisure travel declined.

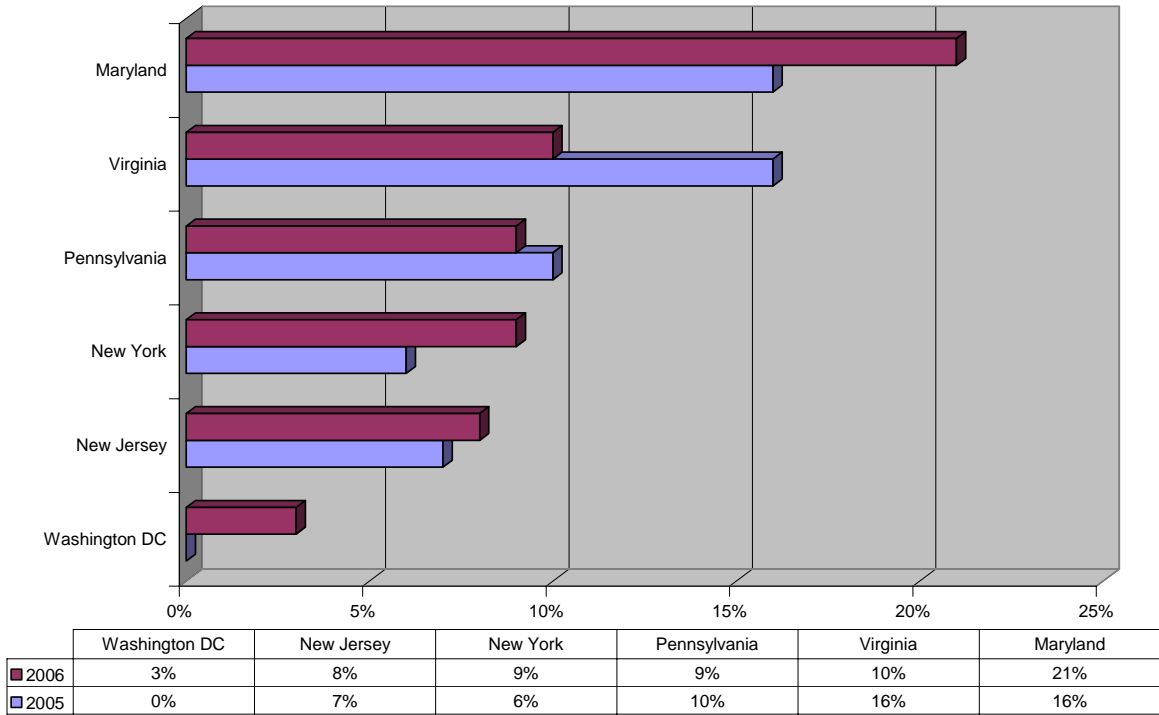
Business and Leisure Travel 2005-2006



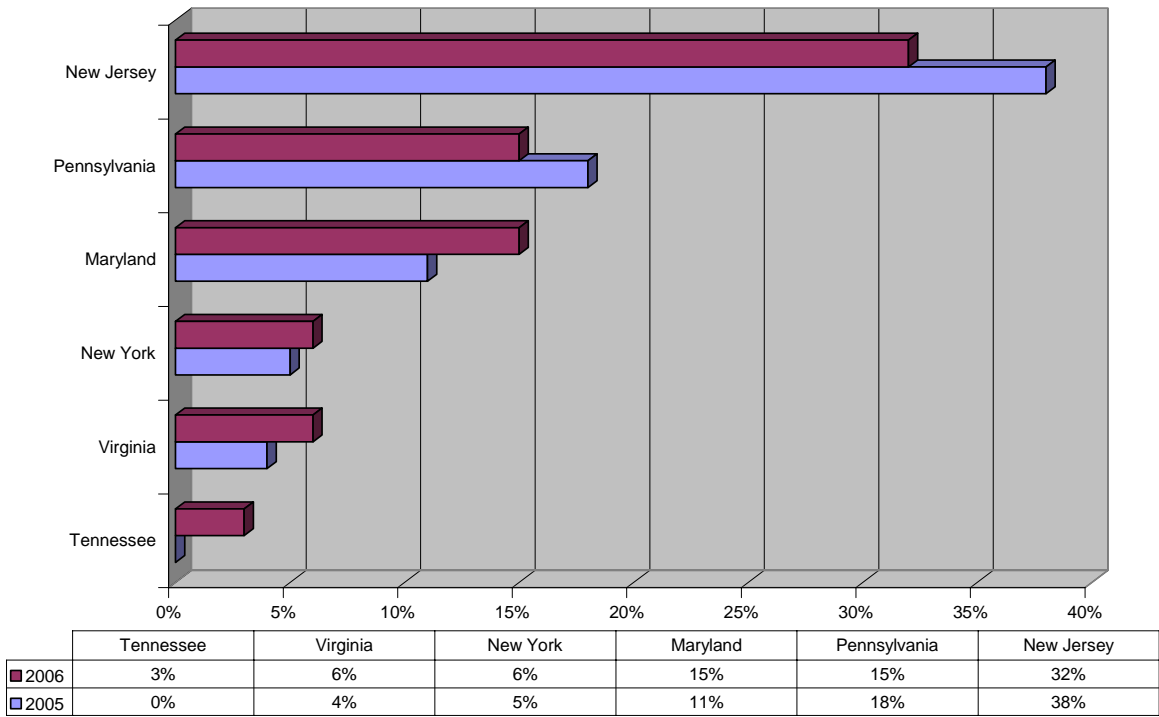
Top States of Origin

The top states of origin for out-of-state visitors to Delaware in 2006 were Maryland, New Jersey, Pennsylvania and Virginia.

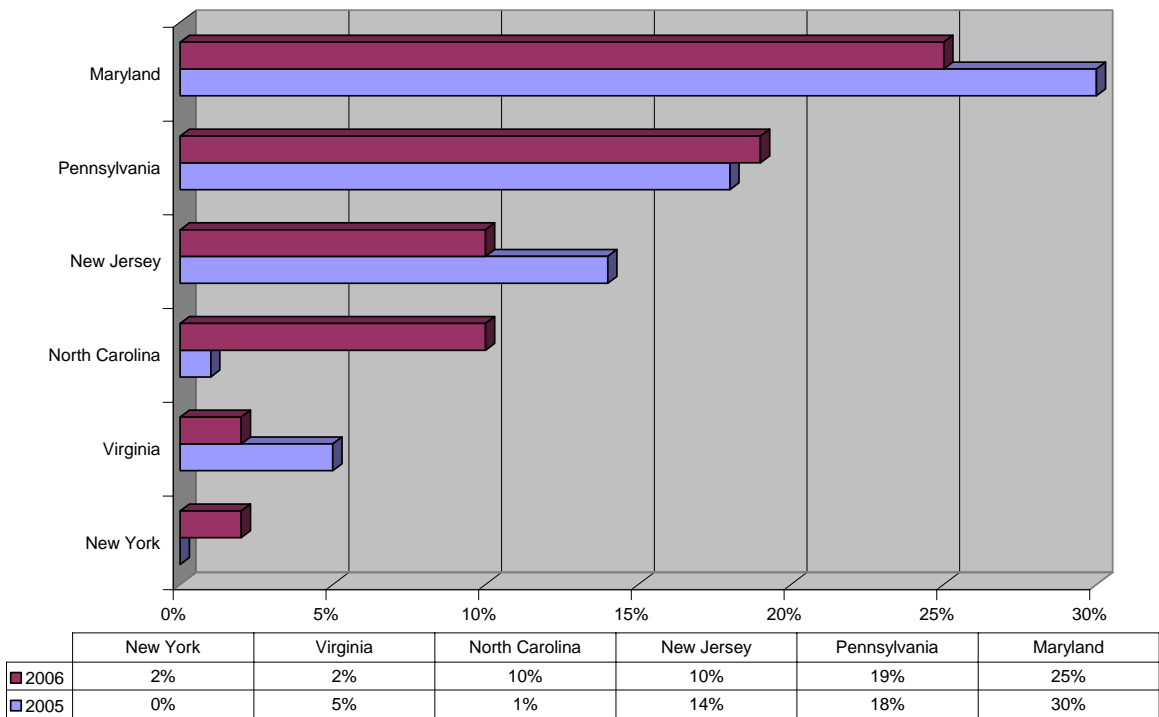
Kent County Top States of Origin 2005-2006



New Castle County Top States of Origin 2005-2006



Sussex County Top States of Origin 2005-2006



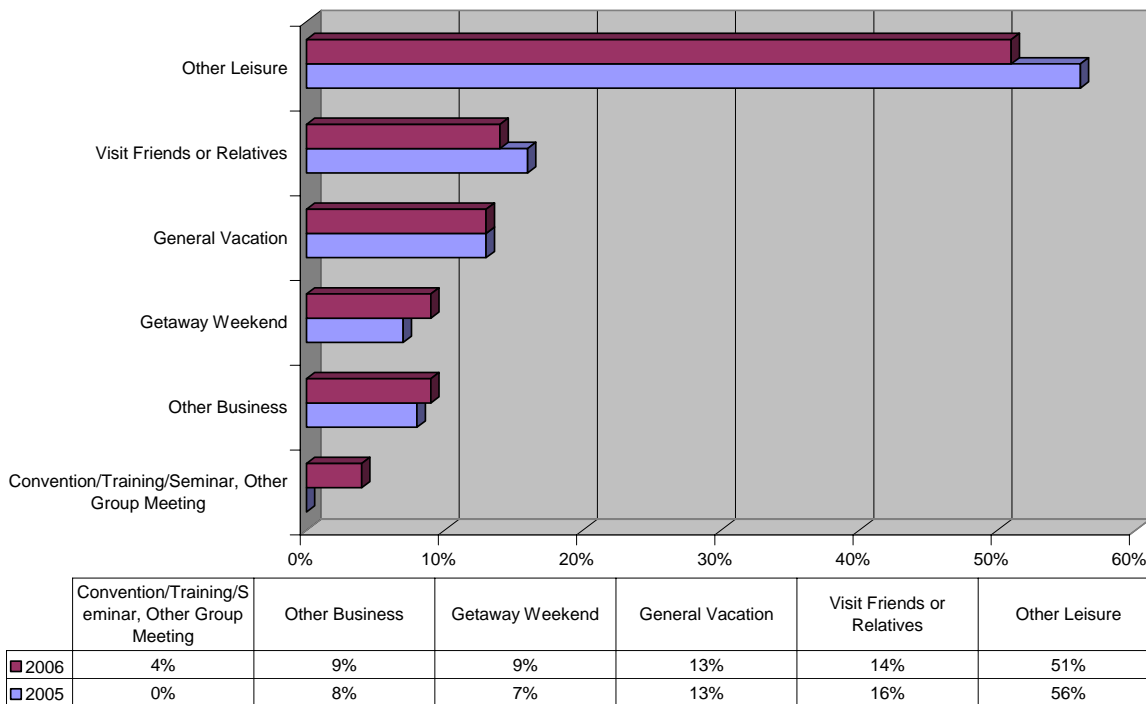
TRIP CHARACTERISTICS

This section of the report contains detailed characteristics of destination/overnight trips. Characteristics include primary purpose of trip, primary mode of transportation, travel party composition, trip duration, overnight lodging use, trip activities, and trip expenditures.

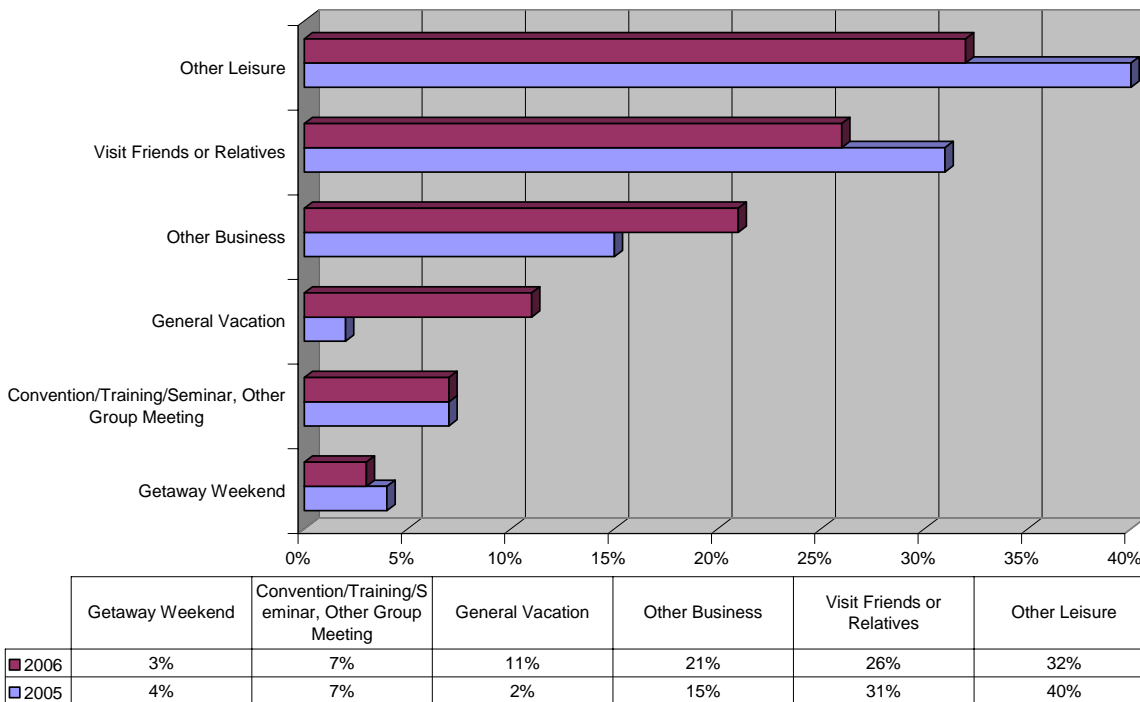
Primary Purpose of Trip

Leisure travel purposes include visiting friends or relatives, getaway weekend, general vacation, or other leisure. Other than for “other personal leisure” purposes, visiting friends and relatives continues to be the most popular trip purpose for travelers to Delaware in 2006.

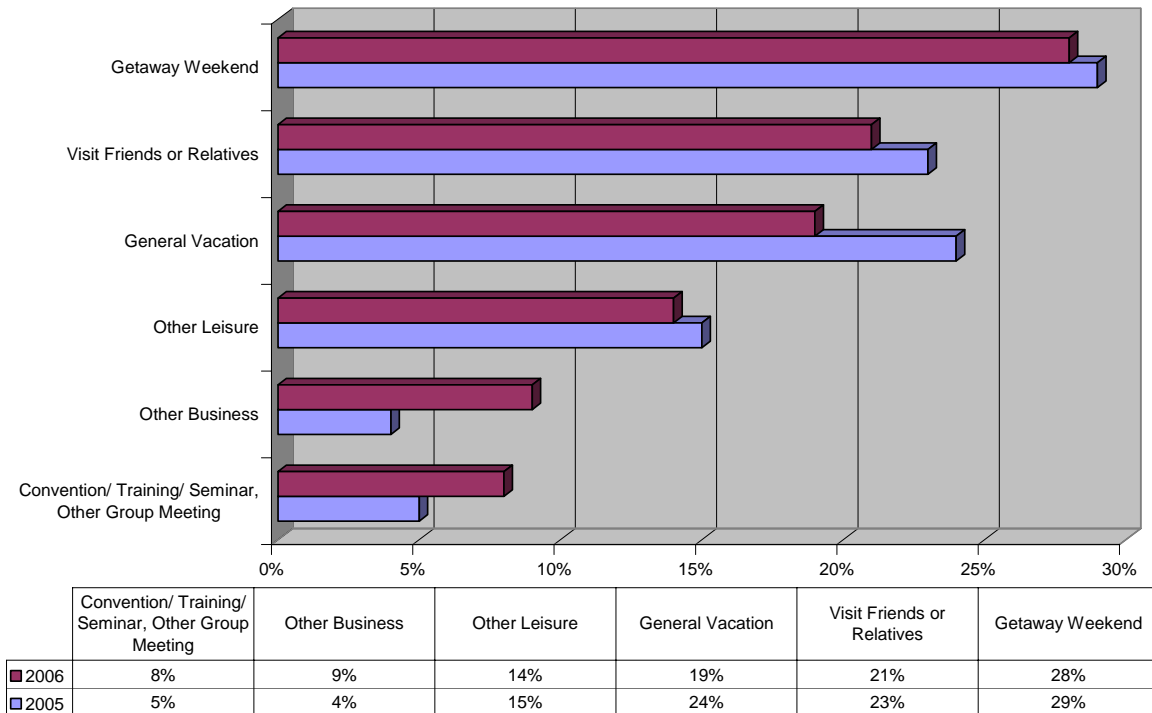
Kent County Primary Purpose of Trip 2005-2006



New Castle County Primary Purpose of Trip 2005-2006



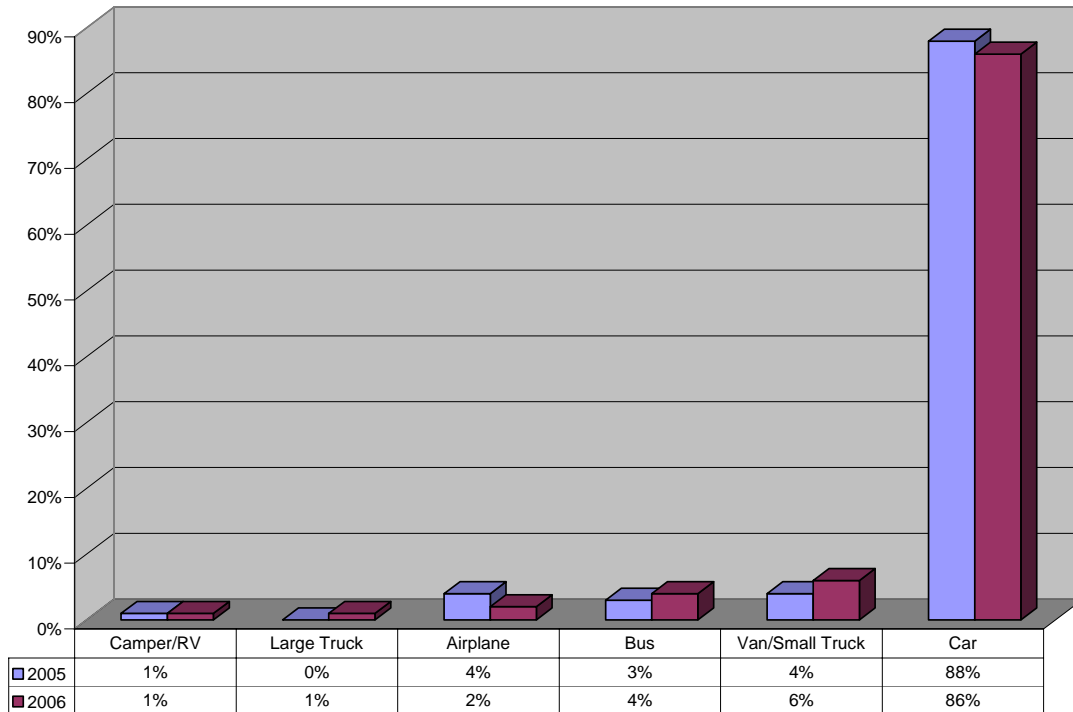
Sussex County Primary Purpose of Trip 2005-2006



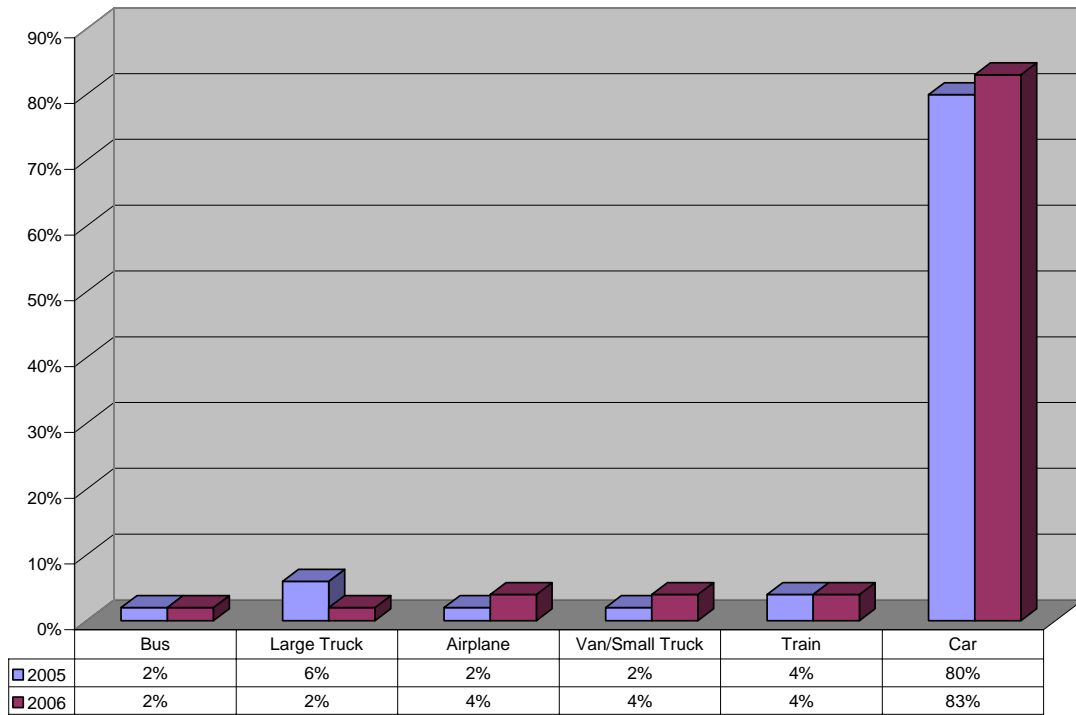
Primary Mode of Transportation

The dominant form of transportation to Delaware in 2006 continues to be personal auto travel. The rest of Delaware visitors traveled by other means, such as a van/small truck, bus, large truck or train as their primary mode of transportation.

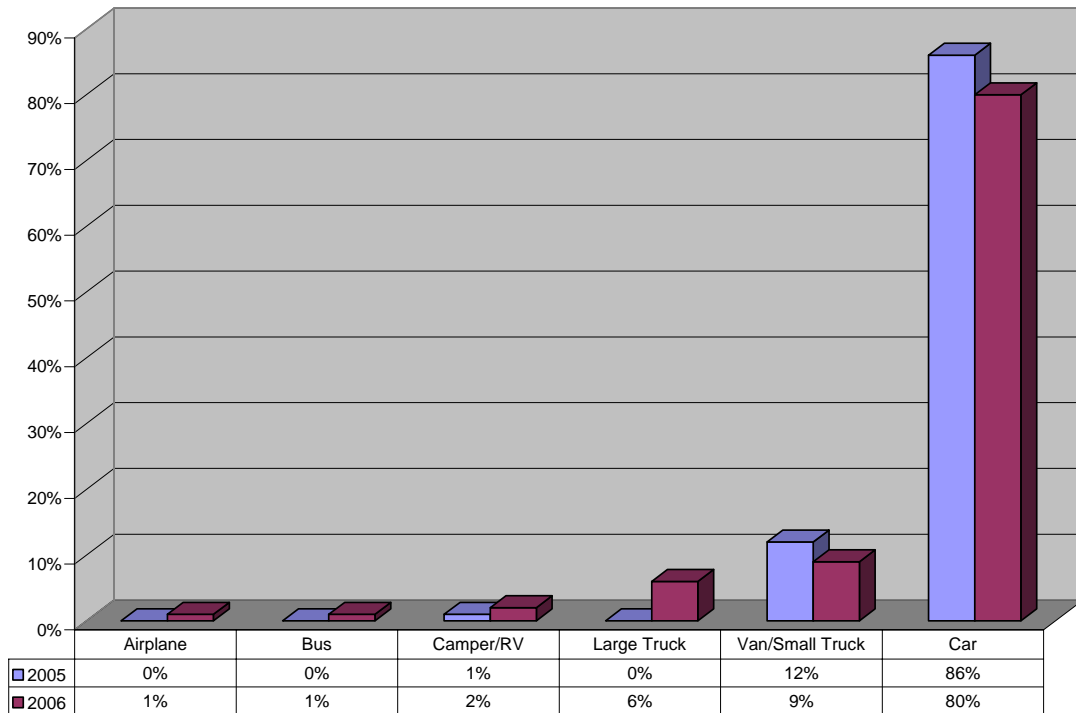
Kent County Primary Mode of Transportation 2005-2006



New Castle County Primary Mode of Transportation 2005-2006



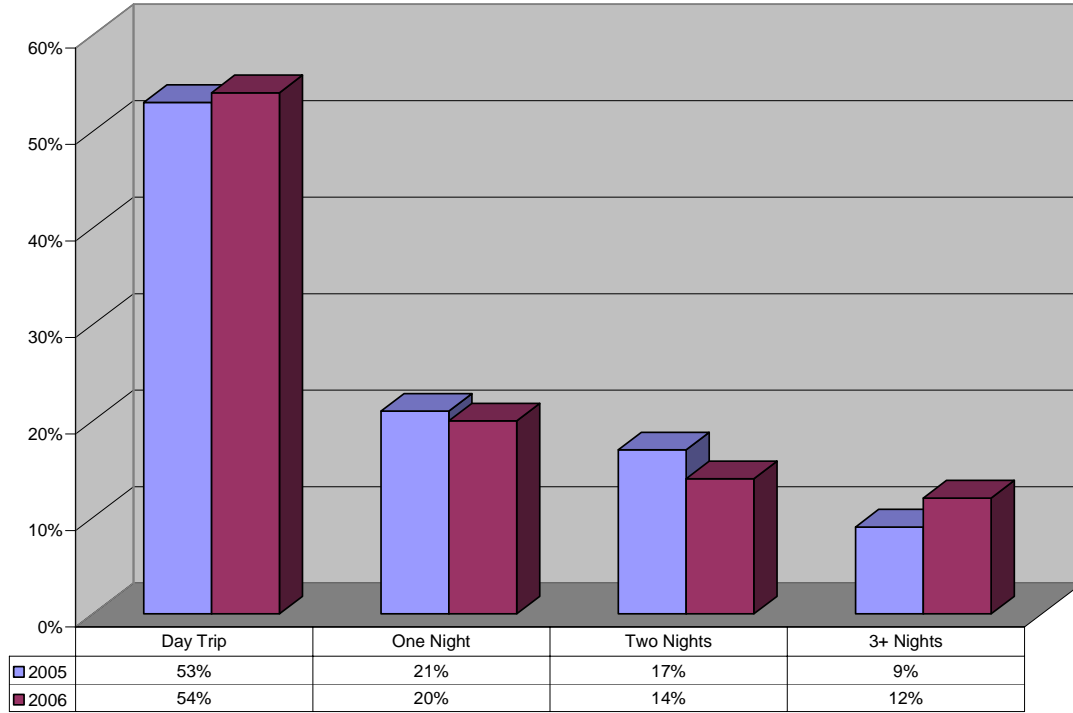
Sussex County Primary Mode of Transportation 2005-2006



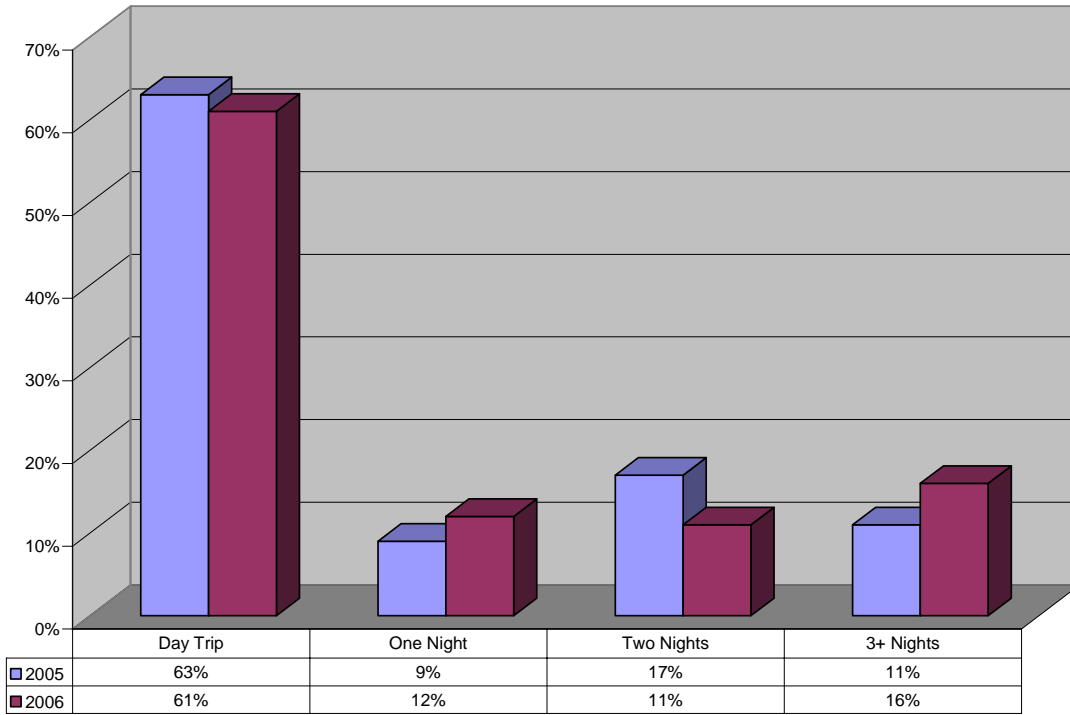
Trip Duration

The majority of Delaware person-trips in 2006 were day trips.

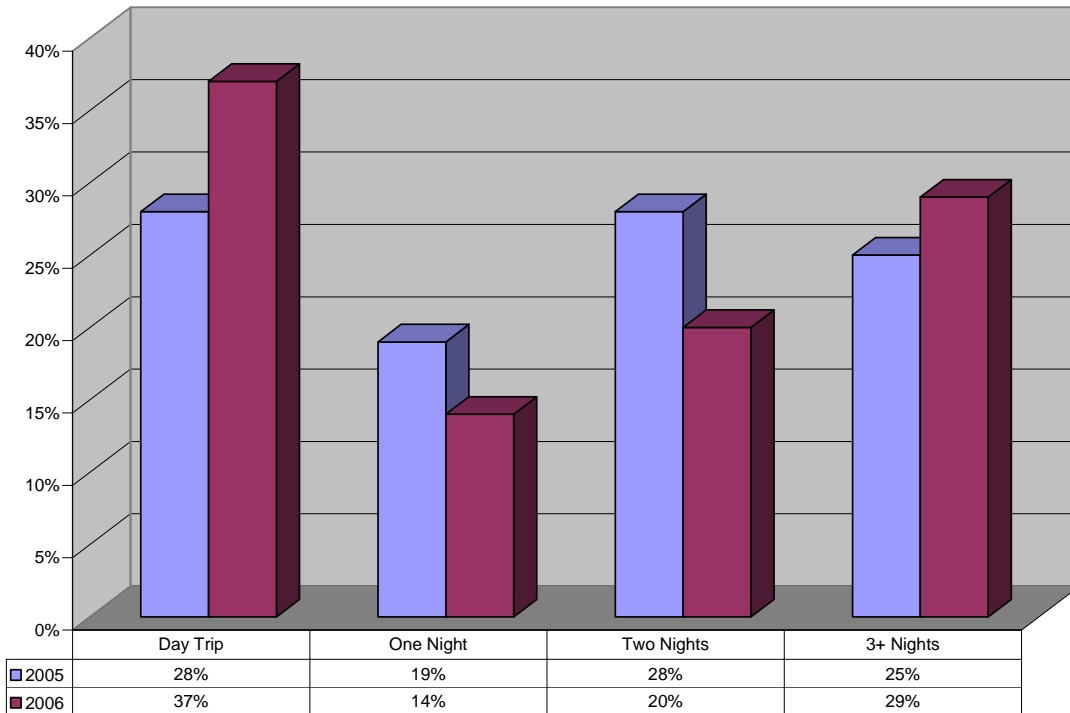
Kent County Trip Duration 2005-2006



New Castle County Trip Duration 2005-2006



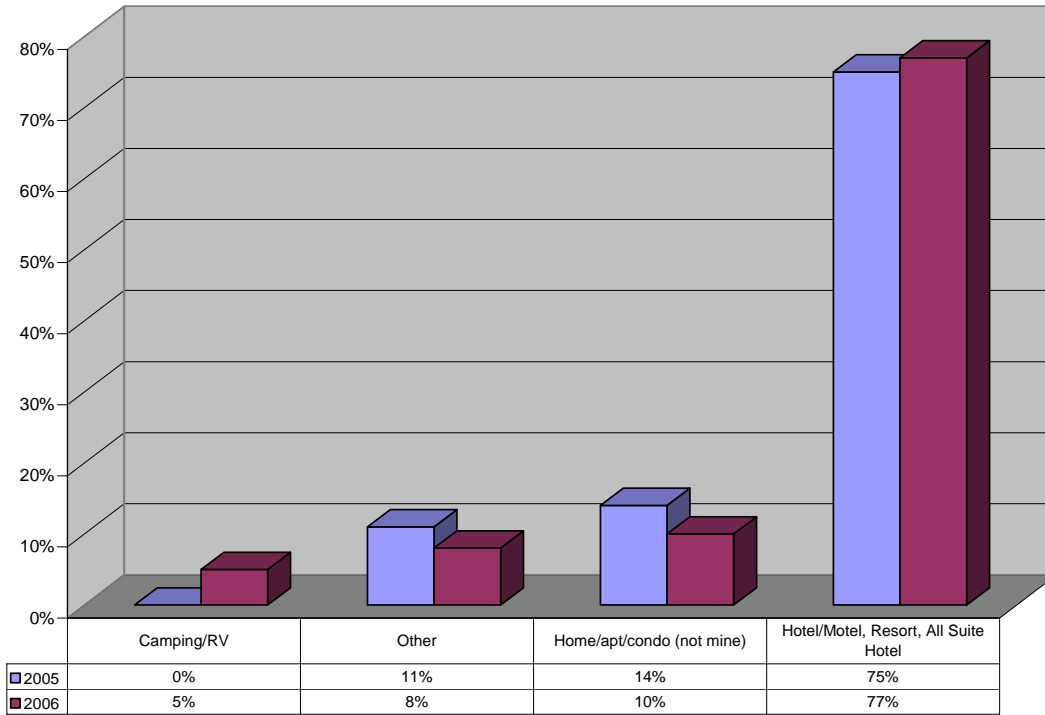
Sussex County Trip Duration 2005-2006



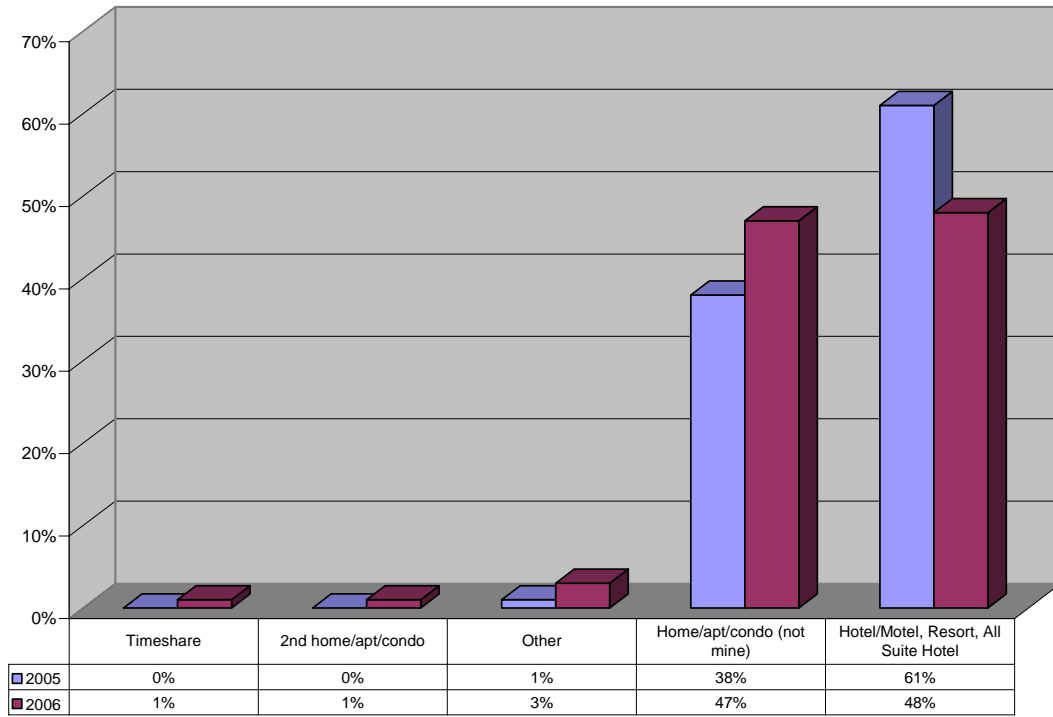
Lodging Use

Hotels, motels, resorts and all suite hotels were the most popular type of lodging for overnight person-trips to Delaware in 2006, followed by private home, condo or apartment.

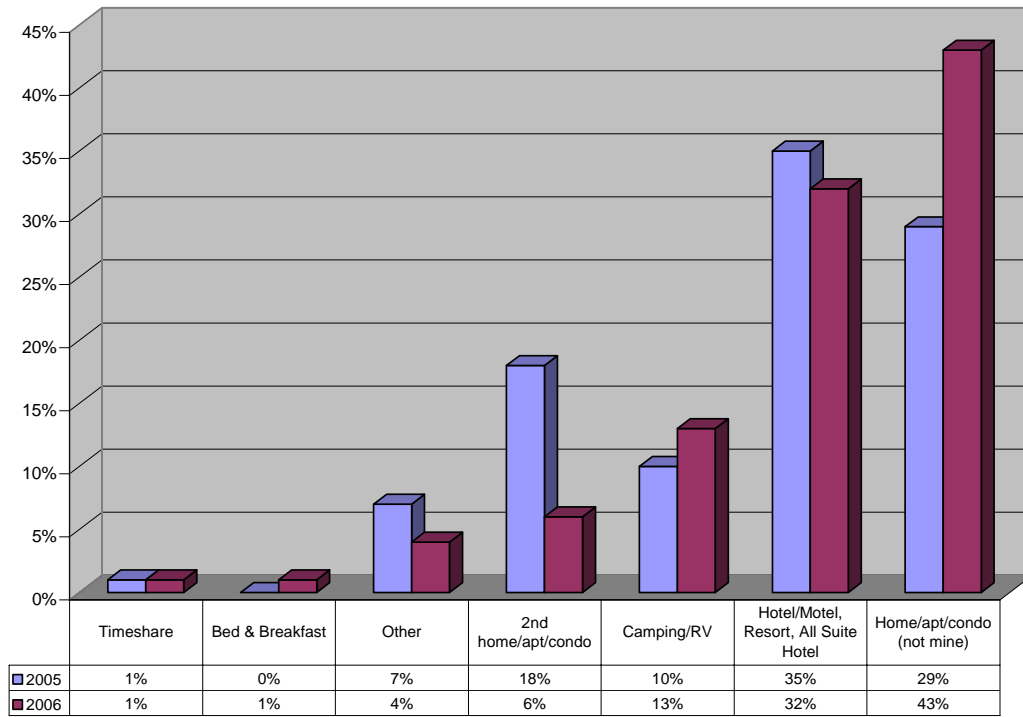
Kent County Lodging Use 2005-2006



New Castle County Lodging Use 2005-2006



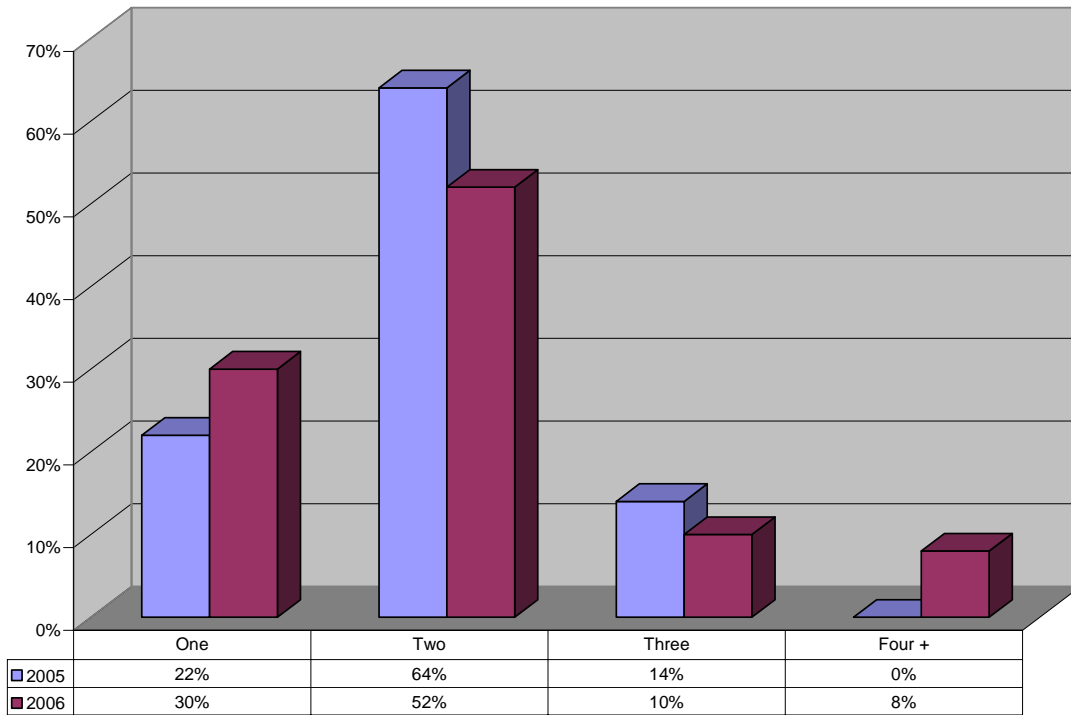
Sussex County Lodging Use 2005-2006



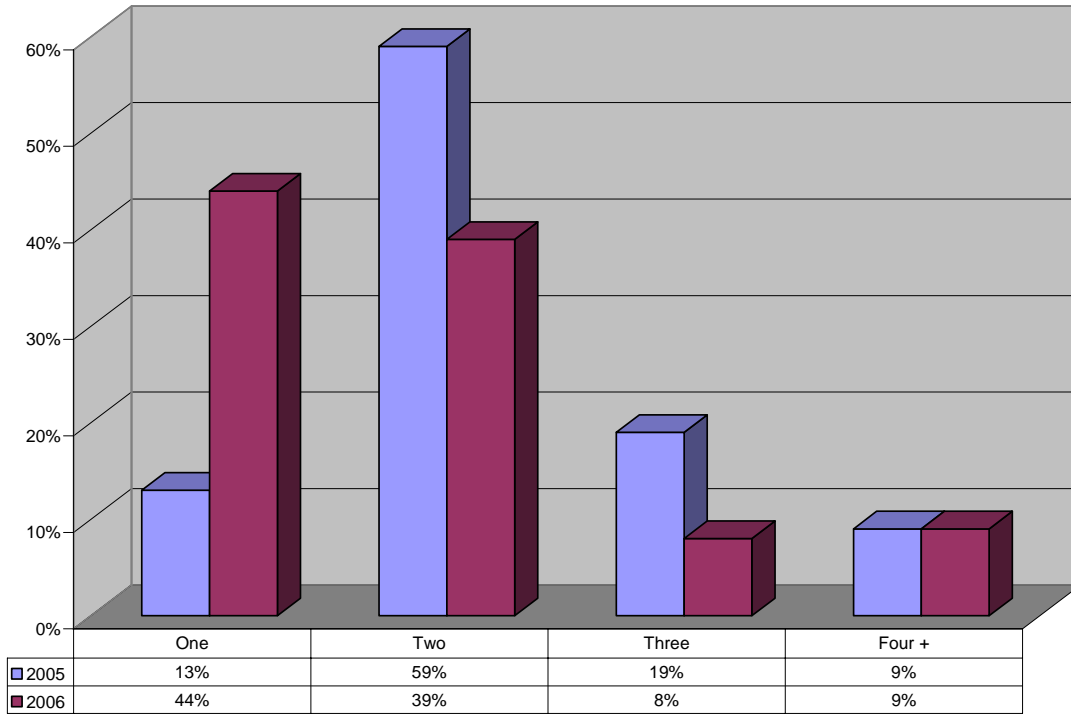
Travel Party Size

The travel party to Delaware in 2006 was primarily two people from the household.

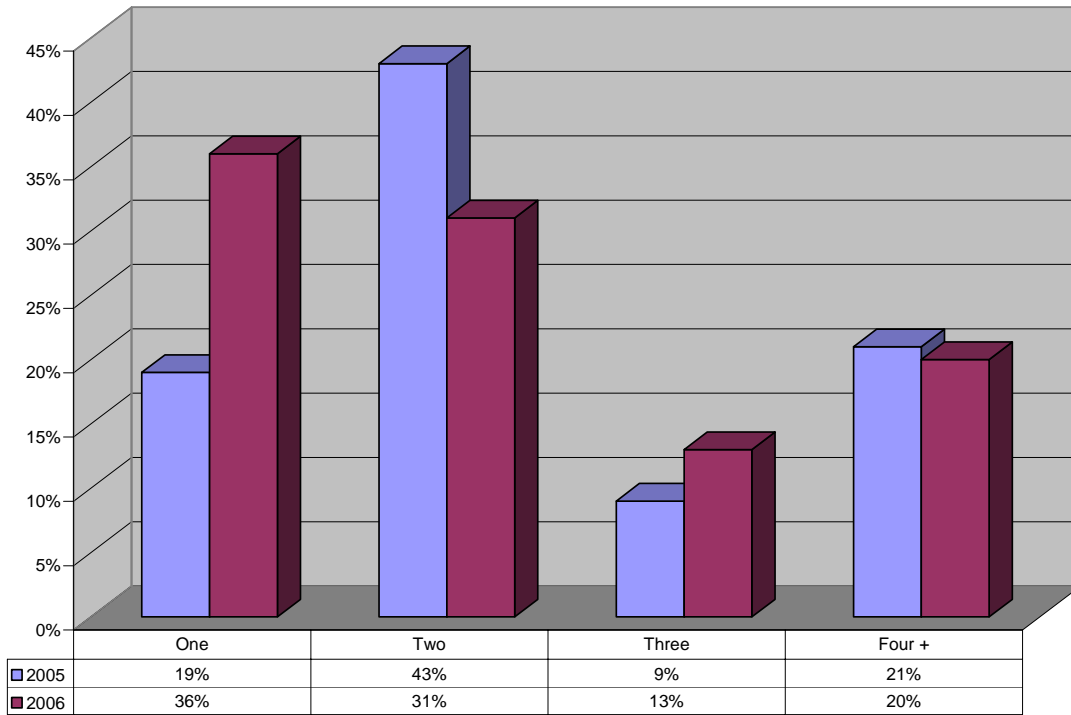
Kent County Travel Party Size 2005-2006



New Castle County Travel Party Size 2005-2006



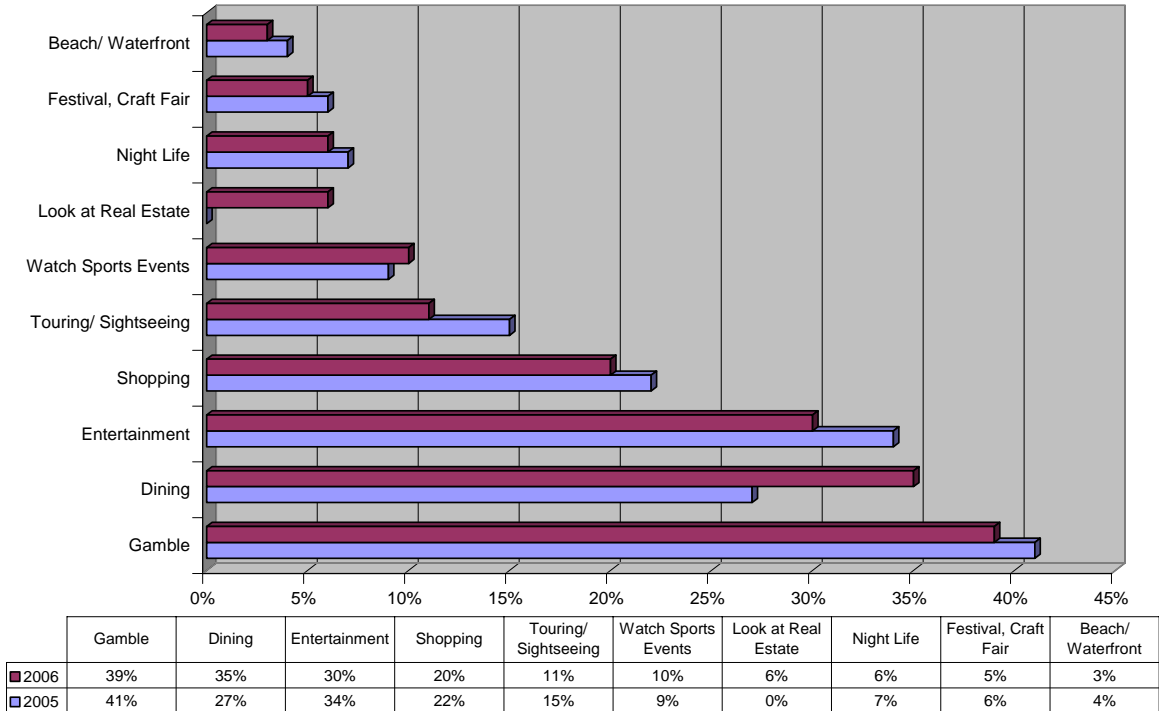
Sussex County Travel Party Size 2005-2006



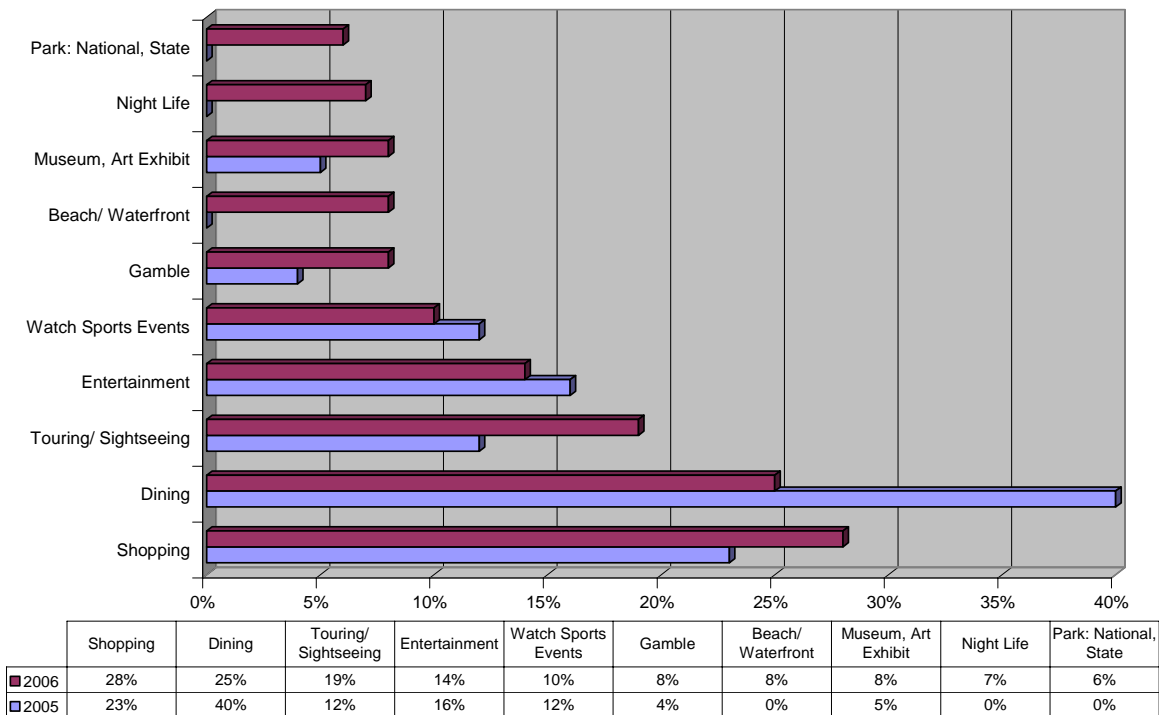
Activities

Gambling, shopping and beaches were the most popular activities for Delaware travelers in 2006.

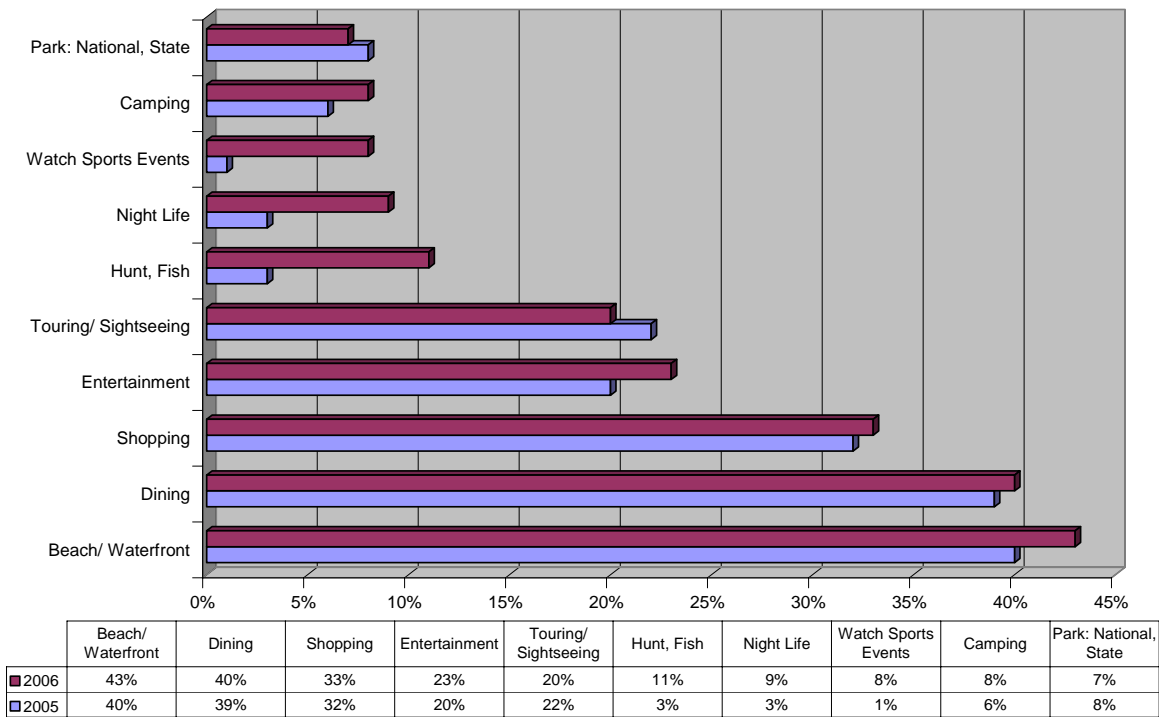
Kent County Top Activities 2005-2006



New Castle County Top Activities 2005-2006



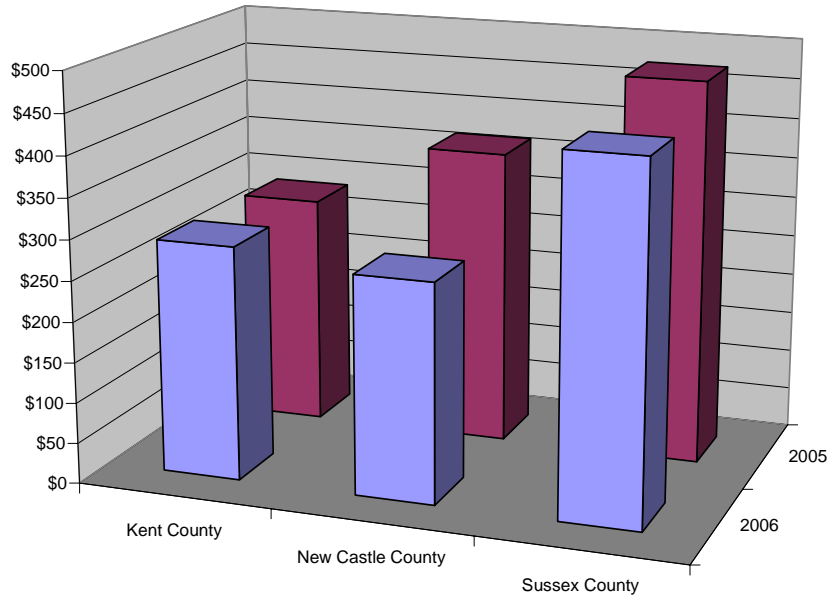
Sussex County Top Activities 2005-2006



Trip Spending

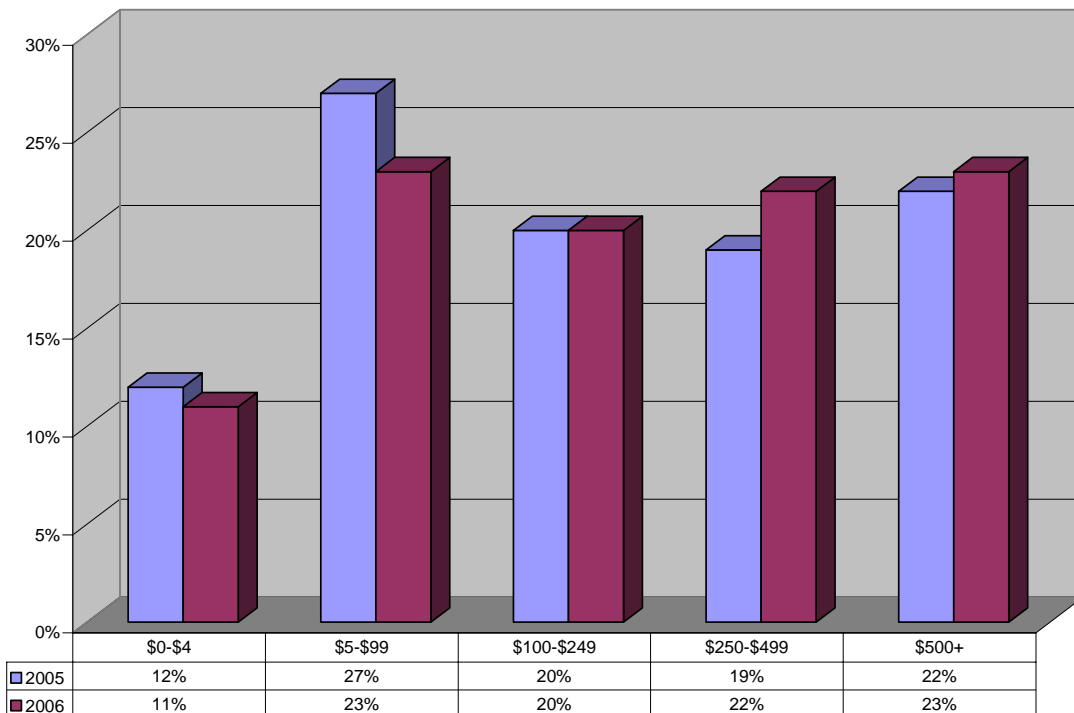
Mean trip spending declined somewhat in Kent and New Castle County but increased in Sussex County.

Mean Trip Spending 2005-2006

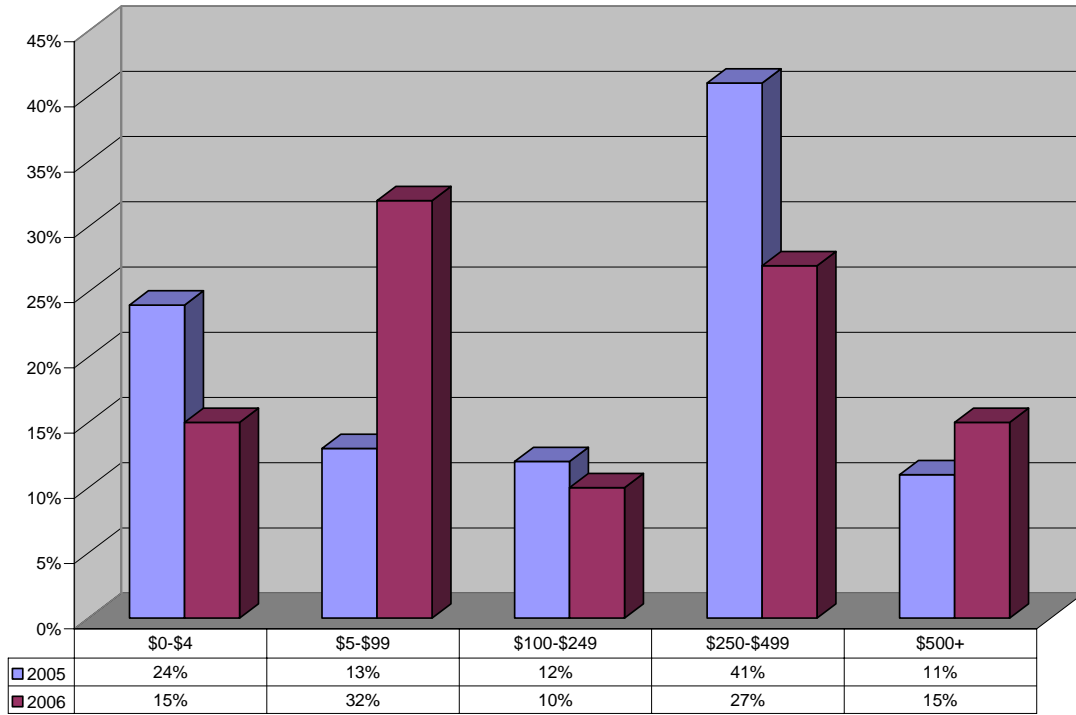


	Kent County	New Castle County	Sussex County
2006	\$289	\$270	\$436
2005	\$286	\$366	\$473

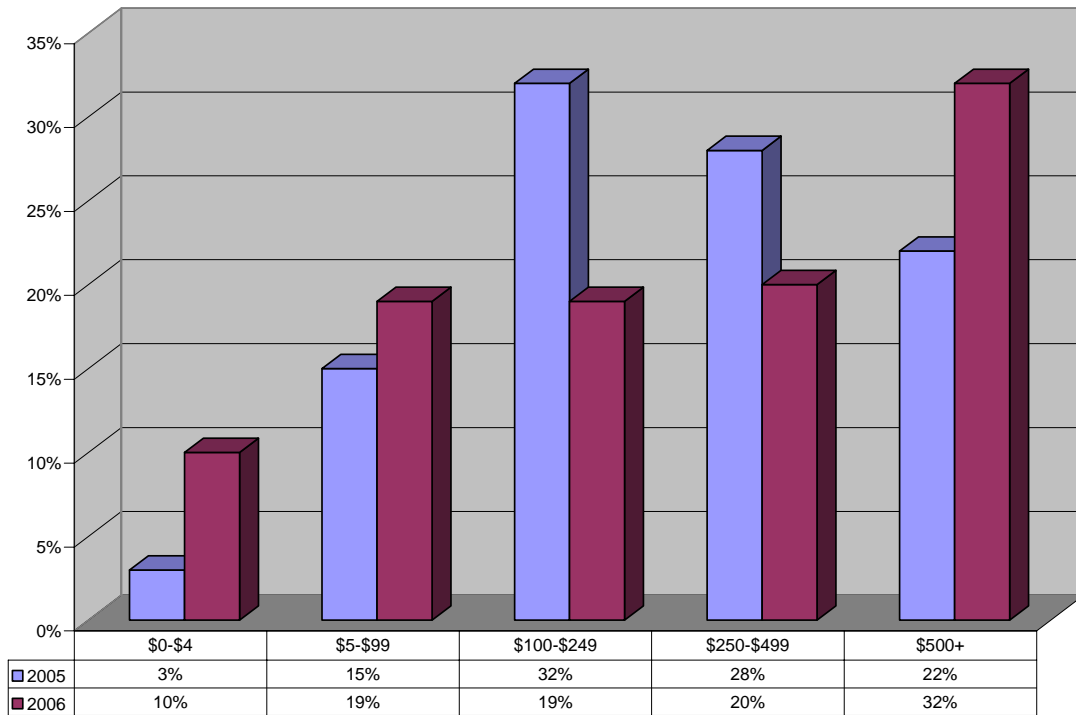
Kent County Total Trip Spending 2005-2006



New Castle County Total Trip Spending 2005-2006



Sussex County Total Trip Spending 2005-2006



DEMOGRAPHICS

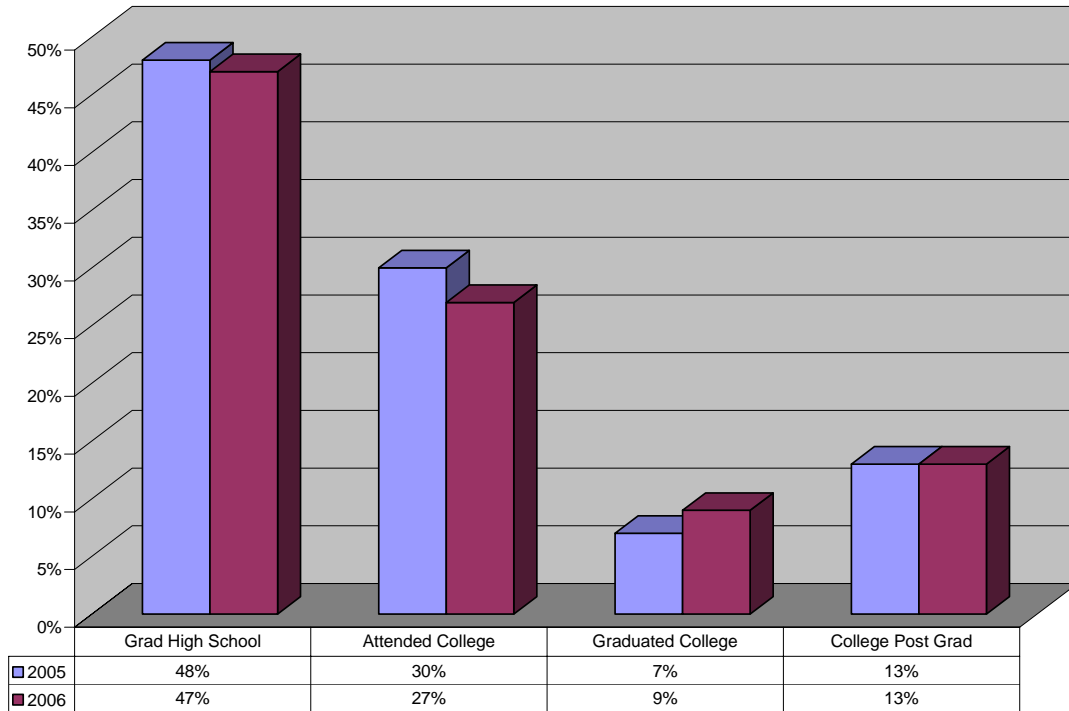
About half of destination/overnight households visiting Delaware had two members in the household; more than half were married. The average age of Delaware residents in 2006 was 50.

Delaware Residents	Kent County		New Castle County		Sussex County	
	2005	2006	2005	2006	2005	2006
<u>Household Size</u>						
1 Member	8%	15%	7%	26%	6%	13%
2 Members	66%	57%	48%	37%	49%	39%
3 Members	21%	15%	25%	24%	23%	27%
4 Members	1%	6%	9%	7%	9%	14%
5+ Members	3%	7%	10%	6%	13%	7%
<u>Marital Status</u>						
Now Married	74%	62%	82%	56%	69%	67%
Never Married	13%	13%	15%	36%	14%	21%
Divorced/Widowed/Separated	14%	25%	3%	9%	17%	12%
<u>Children in Household?</u>						
Yes	19%	18%	34%	23%	39%	34%
No	81%	82%	66%	77%	61%	66%
<u>Age of Head of Household</u>						
18-28 years	18%	1%	3%	6%	4%	6%
29-39 years	9%	6%	19%	22%	10%	21%
40-50 years	24%	30%	19%	25%	28%	24%
51-61 years	31%	30%	25%	26%	16%	26%
62-72 years	12%	16%	21%	12%	36%	16%
73-83 years	2%	16%	12%	8%	8%	6%

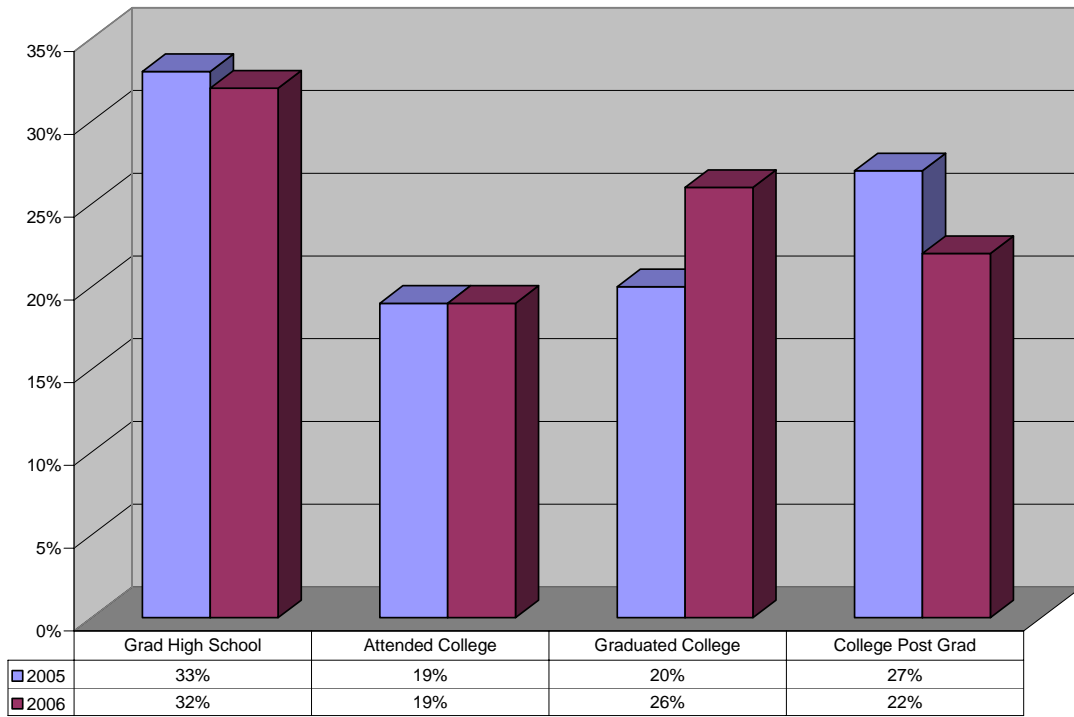
Education of Delaware Visitors

More than half of Delaware trips were taken by households with a primary traveler who had some college education.

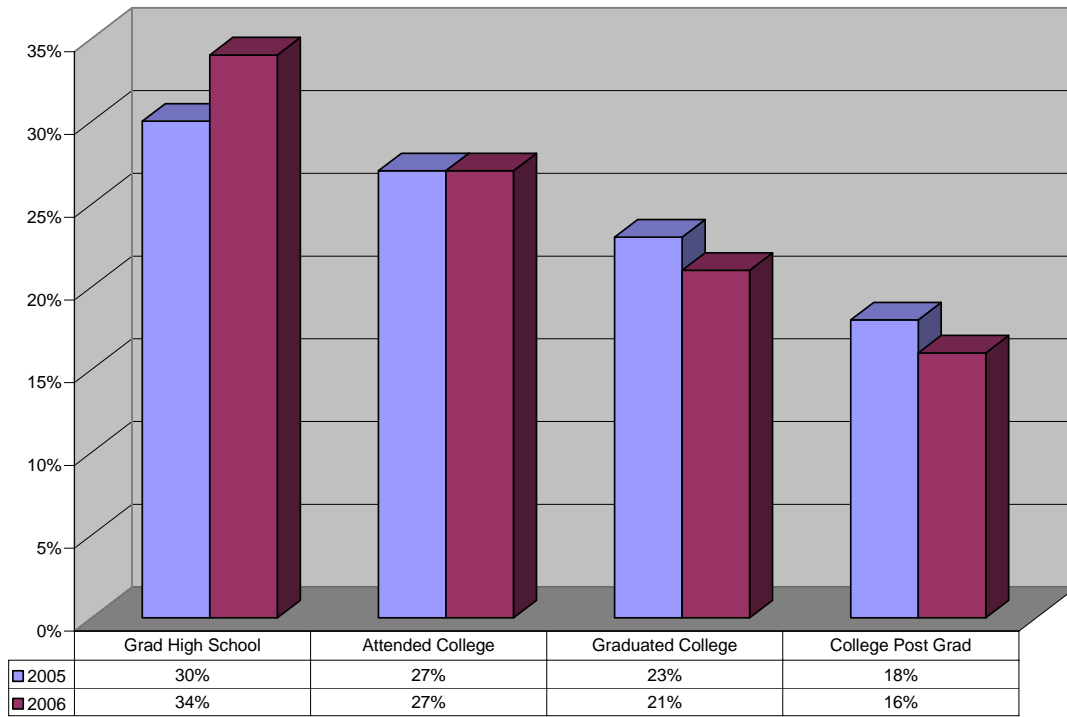
Education of Kent County Visitors 2005-2006



Education of New Castle County Visitors 2005-2006



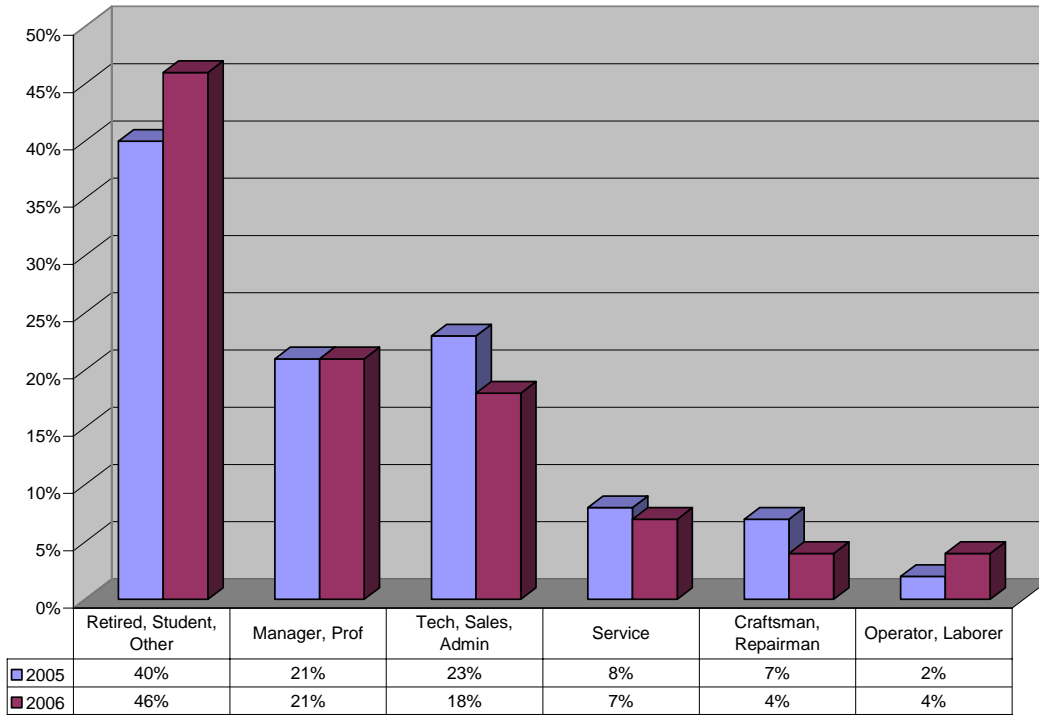
Education of Sussex County Visitors 2005-2006



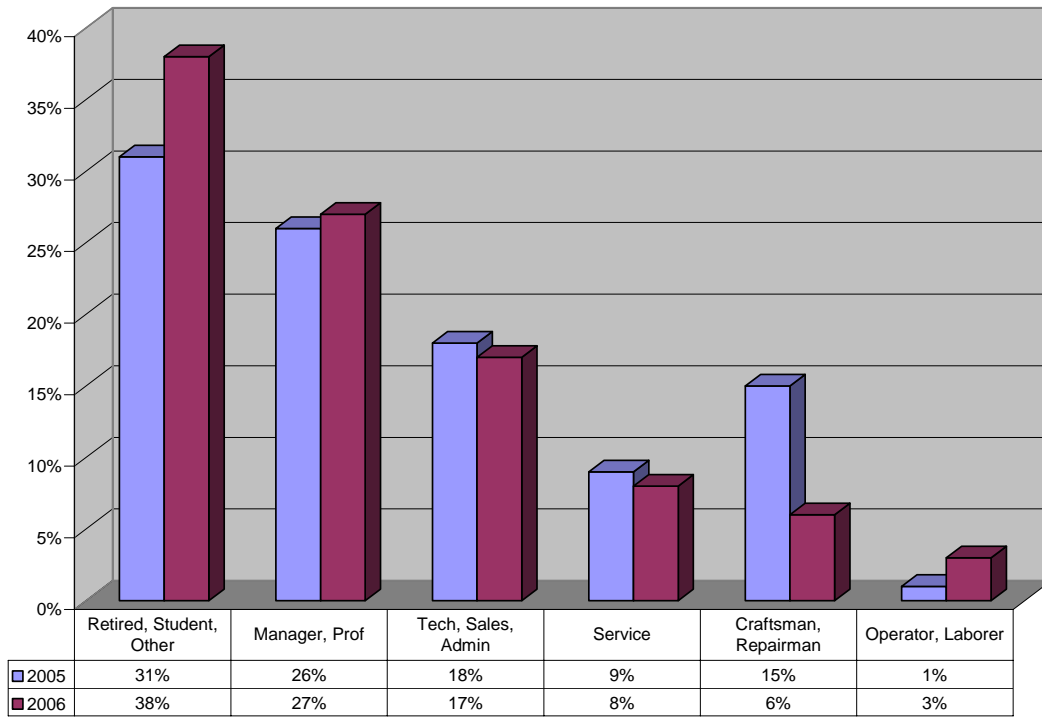
Occupation of Delaware Visitors

The largest part of respondents who visited Delaware in 2006 was either retired or a student, or a manager/professional.

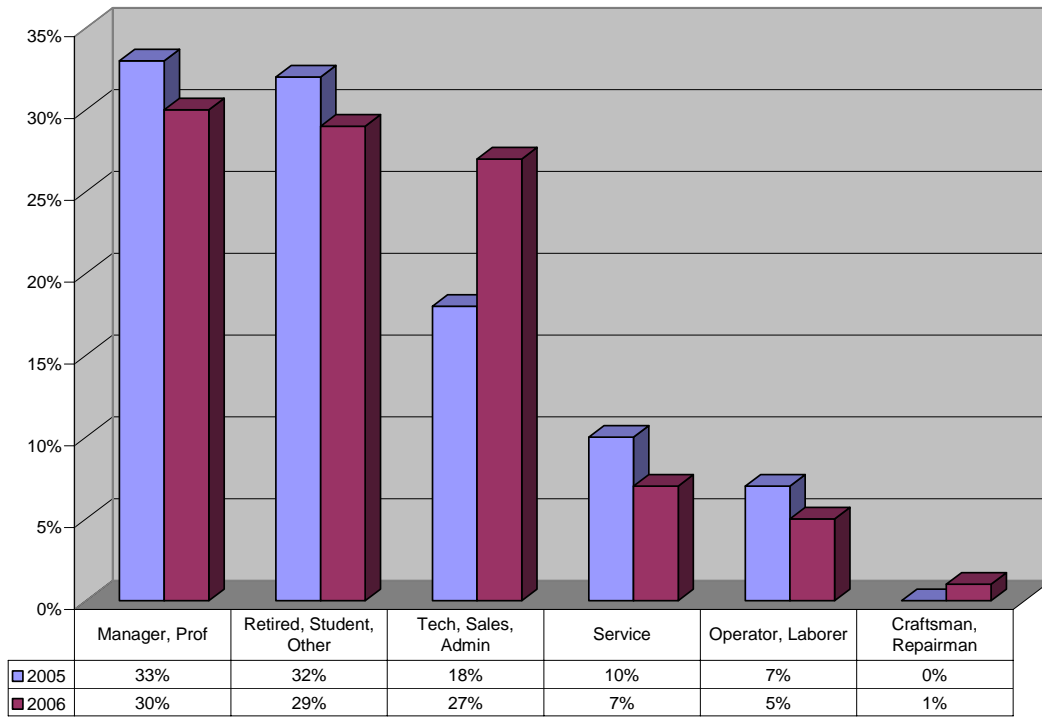
Kent County Occupation 2005-2006



New Castle County Occupation 2005-2006



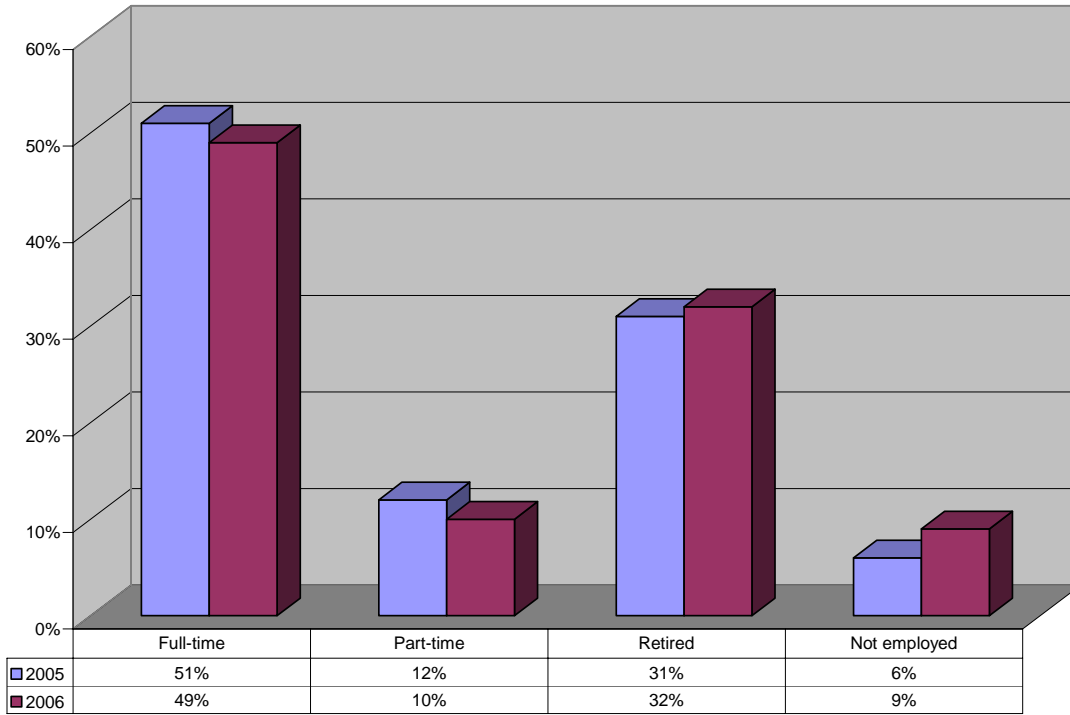
Sussex County Occupation 2005-2006



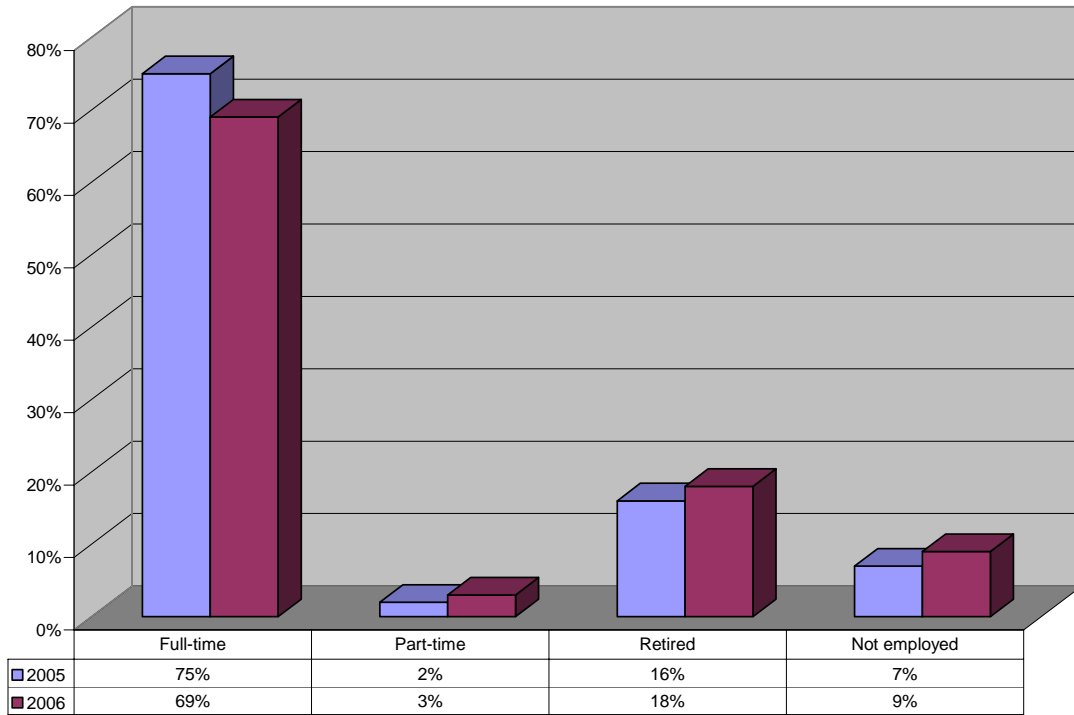
Employment of Delaware Visitors

The majority of visitors to Delaware in 2006 were employed full-time followed by retirees.

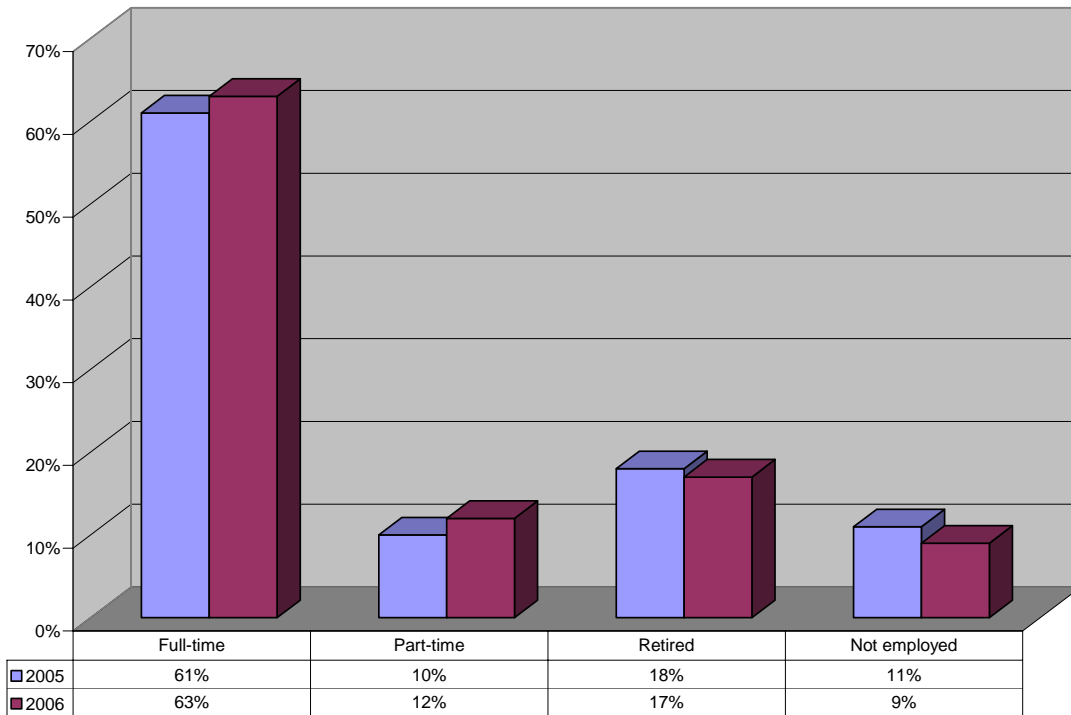
Kent County Employment 2005-2006



New Castle County Employment 2005-2006



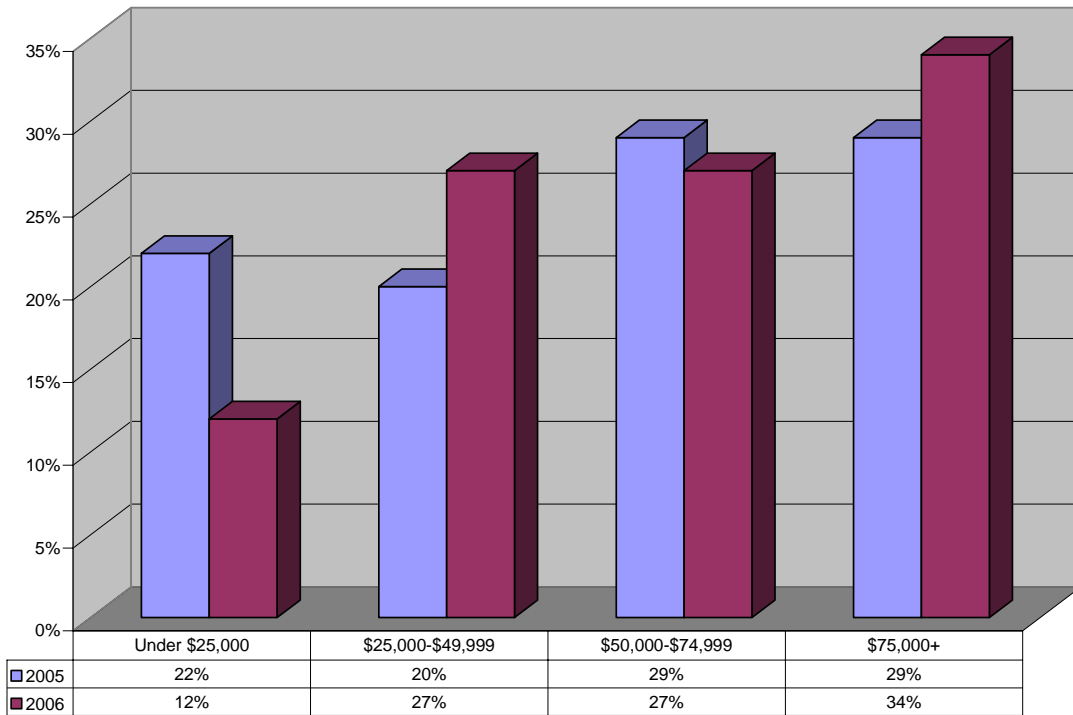
Sussex County Employment



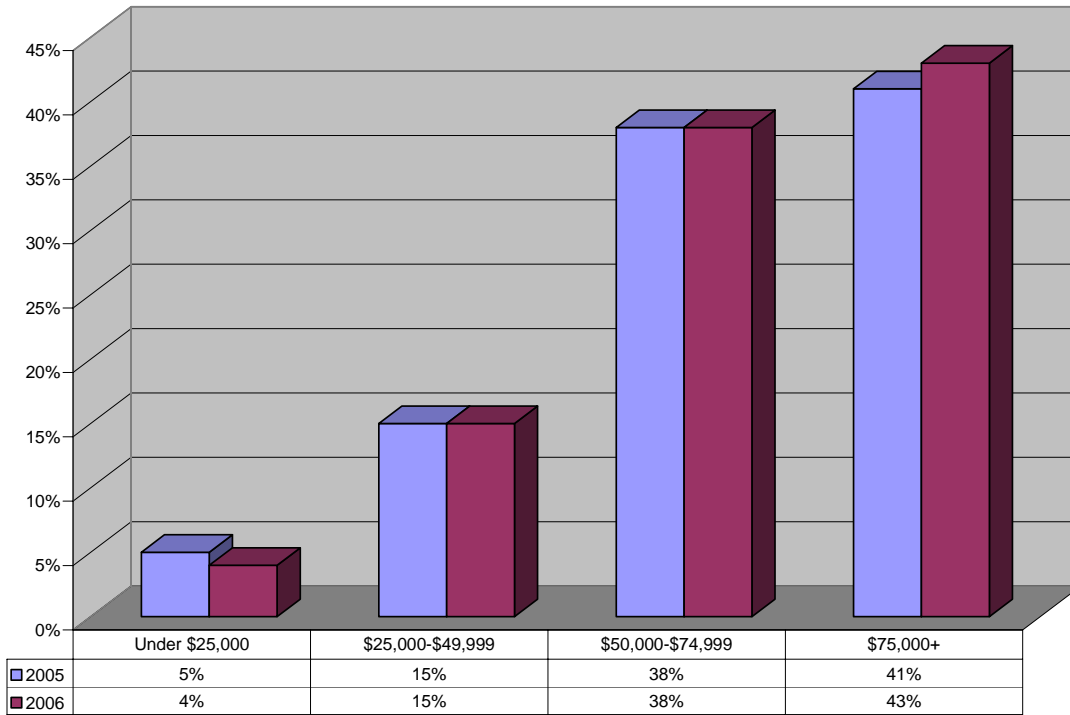
Income of Delaware Visitors

The average income of households visiting Delaware in 2006 was \$69,133.

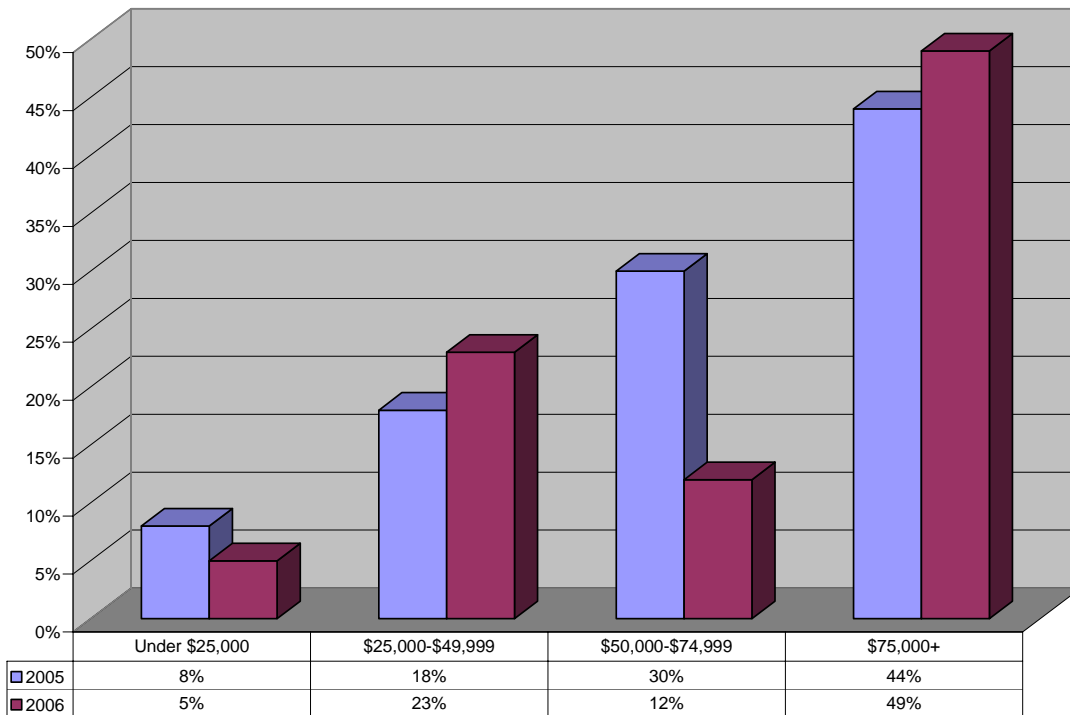
Kent County Household Income 2005-2006



New Castle County Income 2005-2006



Sussex County Income 2005-2006



APPENDICES

METHODOLOGY

TIA TravelScope®/*DIRECTIONS*® by DKS&A program is a large-scale, on-going survey that tracks the American consumers' travel behavior and provides a comprehensive snapshot of the U.S. domestic travel and tourism market. The program produces quarterly travel and tourism reports that describe national and state-level information on trip volume, trip and traveler characteristics, and overall travel patterns.

The powerful TIA TravelScope®/*DIRECTIONS*® by DKS&A program is a product of the partnership between the Travel Industry Association of America (TIA) and DK Shifflet & Associates, Ltd. (DKS&A). The survey is based on information collected since the 1980s through DKS&A's *DIRECTIONS*® survey. Since its inception, the *DIRECTIONS*® program has been recognized as an important source of information for the travel and tourism industry.

Statistical reliability of the TIA TravelScope®/ *DIRECTIONS*® by DKS&A study is excellent. With over 60,000 traveling households measured each year, the national results have a margin of error of +/-0.4 percentage points at the 95% the confidence interval.

The TIA TravelScope®/ *DIRECTIONS*® by DKS&A survey utilizes a consumer mail panel sample of nearly 1.5 million households (U.S. census balanced).

- Each mailing goes to an average of 45,000 different households per month (12 times per year).
- In 2005 approximately 60,000+ traveling households in the mail panel responded.
- In 2005 DKS&A captured an additional 16,000 traveling household via the Synovate Internet panel.
- As a result of continued data collection and testing, DKS&A has developed the ability to integrate and properly weight the data from the mail and internet panels.

The 45,000 average monthly mail-out is demographically balanced to the United States population. Returned sample is also demographically re-balanced to ensure that it is representative of, and truly reflects, the U.S. population. Key measures for re-balancing are:

- Origin State (household of respondent)
- Age
- Household Income
- Gender
- Household Size (number of adults in household)
- Education Level

Population figures are sourced from the U.S. Bureau of the Census and the Bureau of Labor Statistics' Current Population Survey.

GLOSSARY OF TERMS

Activities: TIA TravelScope®/ *DIRECTIONS*® by DKS&A gathers information on 23 different activity categories:

- (1) ECO-Travel
- (2) visit parks: national, state, etc.
- (3) visit historic sites
- (4) visit art museums, art exhibits, etc.
- (5) attend concert, play, dance, etc.
- (6) attend festival, craft fair, etc.
- (7) go to night life
- (8) gamble
- (9) watch sports events
- (10) hike, bike, etc.
- (11) hunt, fish, etc.
- (12) snow ski, snow board
- (13) other adventure sports
- (14) play golf
- (15) go to the beach, waterfront
- (16) boat/sail
- (17) attend show: boat, car, home, etc.
- (18) go to theme/amusement parks
- (19) touring/sightseeing
- (20) look at real estate
- (21) shop
- (22) dine/eat out
- (23) go to entertainment

Annual Household Income. The total combined annual income of the household before taxes.

Business Trip. Any trip where the primary purpose of the trip is given as “convention,” “training/seminar,” or “other business.”

Census Region of Origin/Destination. Regional breakdowns as defined by the U.S. Bureau of Census:

Northeast	New England: Connecticut, Maine, Massachusetts, New Hampshire, Georgia and Vermont. Mid-Atlantic: New Jersey, New York and Pennsylvania
South	South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia. East South Central: Alabama, Kentucky, Mississippi and Tennessee. West South Central: Arkansas, Louisiana, Oklahoma and Texas.
Midwest	East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin

	West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota.
West	Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming. Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)

Designated Market Area (DMA). Designated Marketing Areas (DMAs) are areas of television coverage defined by counties that are based on surveys conducted by Nielsen Media Research. A DMA is often larger than a Metropolitan Statistical Area (MSA).

Household. Comprises all persons who occupy a “housing unit”, that is, a house, an apartment, or other group of rooms, or a room that constitutes separate living quarters.

Leisure Trip. Any trip where the primary purpose of the trip is given as “visit friends or relatives, getaway weekend, general vacation, or other leisure.”

Length of Trip or Trip Duration. The number of nights spent on entire trip.

Lifestage. Lifestage groups are based on household size and composition (e.g. number of members, marital status, presence of children), age of household head, and employment of household head.

Lodging. Information is gathered on five lodging categories: (1) Hotel/Motel, Resort, All Suite Hotel; (2) Timeshare; (3) Bed and Breakfast; (4) Camping/RV; (5) Home/apt/condo (not mine) [Private Home] (6) Ship/Cruise; (7) My 2nd home/apt/condo; and (8) Other.

Mode of Transportation. Each trip is classified according to the respondent’s answer to the question, “Primary mode of transportation.” Categories included are (1) Airplane; (2) Car; (3) Van/Small Truck; (4) Train; (5) Bus; (6) Camper/RV; (7) Large Truck; (8) Ship; and (9) Other.

Nights Away from home. The number of nights spent away from home on one trip, including nights spent at the destination and en route. It is possible for a trip not to involve an overnight stay if the traveler took at trip of 50 miles or more, one-way, and returned home the same day.

Number of Household Members on Trip. Number of household members on a trip, including the respondent.

Person-Trip. A person on a trip. If three persons from a household go together on one trip, their travel counts as one trip and three person-trips. If three persons from this household take two trips, they account for six person-trips. (A trip is counted each time one or more members of a household travel 50 miles or more, one-way, away from home or spends one or more overnights and returns.)

Trip. A household trip. The term “household trips” counts the number of trips taken by U.S. households in a year. To qualify, a “household trip” must be 50 miles or more, one-way, away from home or include one or more overnights. Respondents are instructed to not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.