

Visitor Profile Study

New Castle County



Delaware Economic Development Office
Industry Research Section
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2003 New Castle County Visitor Profile Study

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METHODOLOGY

TravelScope is a cooperative travel survey that provides detailed, comparable data about the behavior of U.S. travelers that was developed by the Travel Industry Association of America (TIA) in 1994. A panel of 565,000 households representing over a million people nationwide (one in every 224 U.S. households) is used for the survey. Each month, a fresh sample of 25,000 households are sent a questionnaire which asks for the number of trips of 50 miles or more away from home and/or overnight trips taken in the previous month by members of that household. Respondents are asked to record details of up to three trips in the previous month. Because TravelScope does not track visitor trips under 50 miles from home, such trips are not included in this study.

Weights and Projections

The survey records detailed information for up to three trips in a month; however, the total number of trips taken by members of a household in a month is also reported. Detailed characteristics of the remaining trips are extrapolated from the trip characteristics of the trips for which details were reported.

Finally, the raw sample household data gathered from the panel is balanced and projected to represent the entire U.S. household population.

2003 Program Changes

In response to requests from subscribers, TIA implemented significant changes within TravelScope in 2003 including survey card design, response choices, and weighting procedures. In general, the new survey card increased the recall of day-trips by respondents, though this varied by region. Response choices for three major categories – purpose of trip, transportation, and activities – were modified. Due to these changes, annual comparisons of these categories must be strongly cautioned and, in some instances, are not advised. Weighting procedures were also slightly changed to reflect demographic data by class-age groups and more precisely target these groups; the changes resulted in more accurate representation of younger households.

Due to program changes, 2003 serves as a benchmark year for TravelScope data. Comparisons between 2003 and previous years within this profile have been limited and still require cautious consideration.

SUMMARY

The following visitor profile for New Castle County is one of three studies for Delaware focusing exclusively on tourism and includes data for 2003 and, where appropriate, the five year period for 1999 through 2003. Similar studies are available for Kent and Sussex Counties. Using a database called TravelScope, developed by the Travel Industry Association of America (TIA), the following visitor profile was developed for New Castle County.

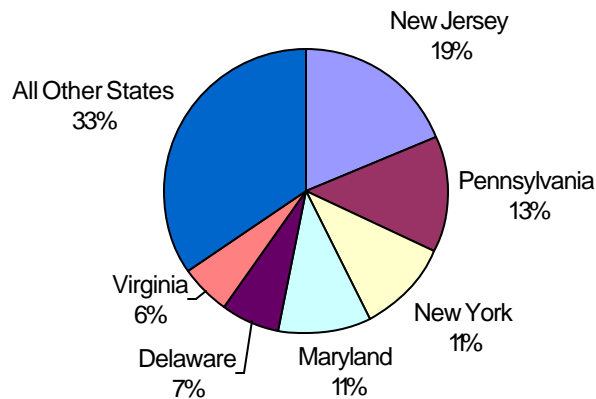
- This visitor profile includes aggregated totals for 22 city codes available in TravelScope which represent 22 communities in New Castle County.
- This visitor profile is based on total projected trips (including pass-through visitors) and overnight stays for New Castle County.
- Data is presented annually and quarterly to demonstrate the seasonality associated with tourism and tourism activities.
- The study is limited to the following five focus areas:
 1. State of Origin;
 2. Primary Purpose of Trip;
 3. Trip Duration;
 4. Activities; and
 5. Expenditures.

State of Origin

- In 2003, the total number of projected person trips to New Castle County was 1,230,000.
- For the period 1999 to 2003, visitors to New Castle County totaled 6.8 million. Ninety percent, or 6.1 million, indicated the county as their primary destination and/or they stayed over at least one night.
- The top six states of origin did not change significantly from 2002 to 2003 with the exception of Georgia no longer ranking in the top six states. Visitors continue to originate predominantly from states nearby Delaware.

| <u>2002</u> | <u>2003</u> |
|--------------|--------------|
| New Jersey | New Jersey |
| Georgia | Pennsylvania |
| Maryland | New York |
| New York | Maryland |
| Pennsylvania | Delaware |
| Virginia | Virginia |

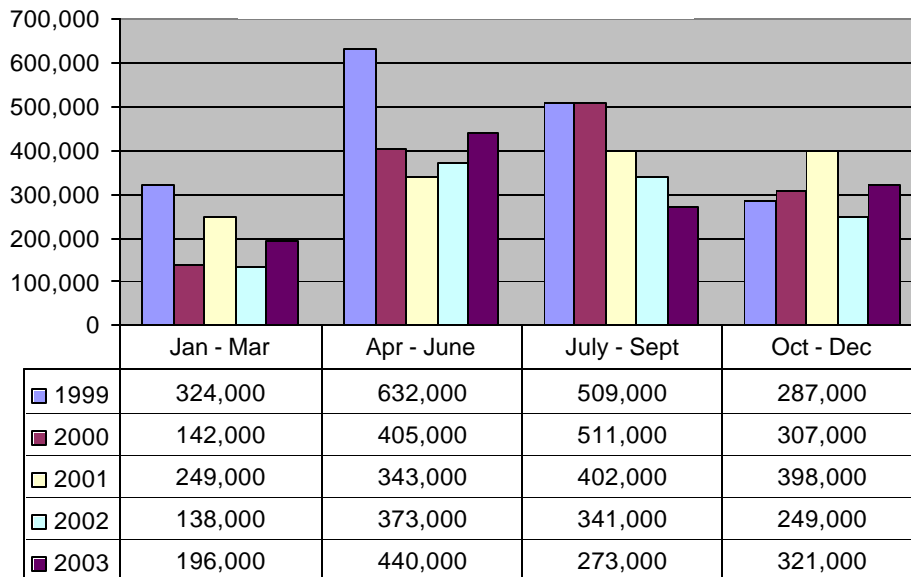
**NEW CASTLE COUNTY
2003 Visitor State Of Origin
Top Six States**



- The seasonality associated with visitation to New Castle County in 2003 shifted somewhat from the previous year with more visitors in the first, second and fourth quarters and a decrease in the third. Quarterly distribution was as follows:

| | <u>2002</u> | <u>2003</u> | <u>1999-2003</u> |
|-------------------------|-------------|-------------|------------------|
| 1 st Quarter | 13% | 16% | 15% |
| 2 nd Quarter | 34% | 36% | 32% |
| 3 rd Quarter | 31% | 22% | 30% |
| 4 th Quarter | 23% | 26% | 23% |

**NEW CASTLE COUNTY
1999-2003 Total Trips Quarterly**



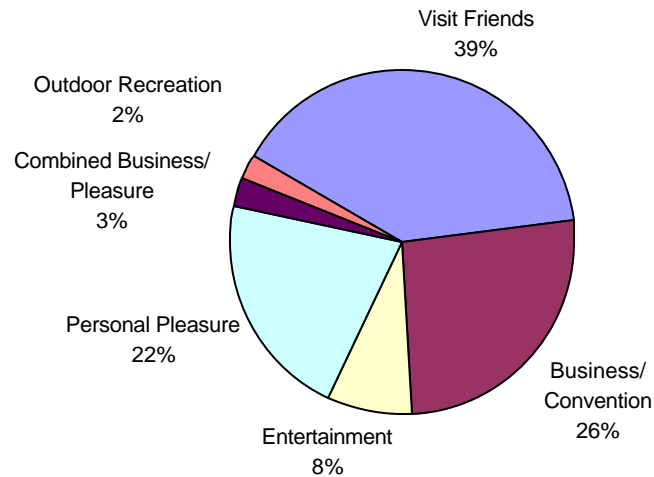
Primary Purpose of Trip

In 2003, personal and “other” categories were consolidated, and the business categories were revamped. Data comparisons between 2003 and previous years should be cautioned.

- In order of their popularity in New Castle County in 2003, primary purposes for travel were visiting friends or relatives (40 percent), business/convention (26 percent), other personal/pleasure (22 percent), entertainment/sightseeing (8 percent), combined business/pleasure (3 percent), and outdoor recreation (2 percent).

| <u>Purpose</u> | <u>2003</u> |
|----------------------------|-------------|
| Visiting friends/relatives | 40% |
| Business/convention | 26% |
| Other pleasure/personal | 22% |
| Entertainment/sightseeing | 8% |
| Combined business/pleasure | 3% |
| Outdoor recreation | 2% |

**NEW CASTLE COUNTY
2003 Primary Purpose**



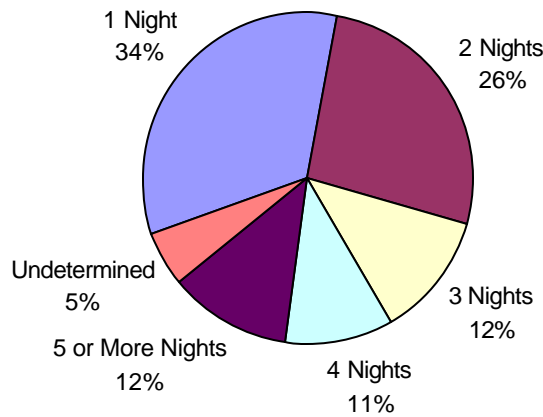
- Visiting friends or relatives has been the most popular primary purpose for visitor trips to New Castle County since 1999.

Trip Duration

- In 2003, 41 percent, or 501,000, visitor responses regarding trip duration were no nights/no answer.
- Accordingly, 59 percent of visitors to New Castle County stayed at least one night.
- Of the visitors to the county that stayed at least one night, the trip durations were as follows:

| | <u>2002</u> | <u>2003</u> |
|---------------------|-------------|-------------|
| One night | 32% | 34% |
| Two nights | 30% | 26% |
| Three nights | 13% | 12% |
| Four nights | 11% | 11% |
| Five or more nights | 14% | 12% |
| Undetermined | -- | 5 |

**NEW CASTLE COUNTY
2003 Trip Duration
(Excluding No Nights/No Answer)**



- Between 1999 and 2003, 40 percent of responses from visitors to the county were no nights/no answer; 60 percent stayed at least one night.
- An average of 206,300 visitors per quarter stayed at least one night between 1999 and 2003.

Activities

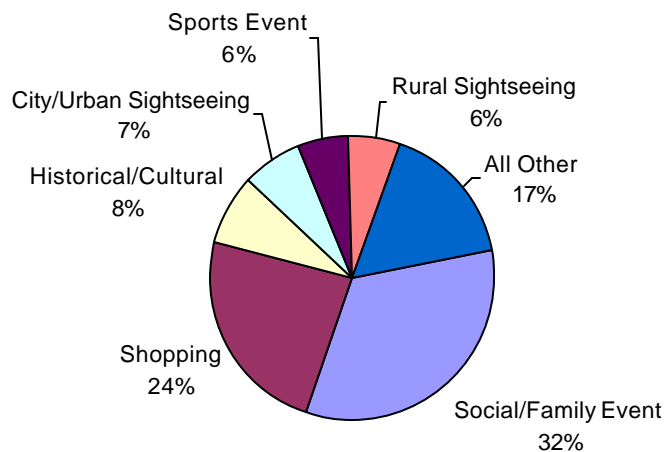
In 2003, major changes occurred in this category: a code was split, a code was dropped, and several codes were added. Additional activity options changed response patterns even for those codes that remained the same. Therefore, activity data comparisons between 2003 and previous years are not advised.

It is important to note that visitors can choose more than one activity participated in during a trip. Therefore, the percentages presented are the percent of total visitors who indicated participation in each activity. The percentages will not add to 100 percent because some visitors participate in more than one activity.

- Ordered respectively, the six most popular activities indicated by visitors in 2003 were:

2003
Social/family event (33%)
Shopping (24%)
Historical/cultural (8%)
City/urban sightseeing (7%)
Sports event (6%)
Rural sightseeing (6%)

**NEW CASTLE COUNTY
2003 Activities
Six Most Popular Activities**



- For the period 1999 to 2003, shopping and historical places/museums were the two most popular activities for visitors.

Expenditures

- In 2003 an estimated 691,000 households spent an average \$268 per household. Total average expenditures exceeded \$185 million.
- The average number of people in a household travel party in 2002 was 1.7 persons with an average tourism expenditure of \$157 per person.
- Statewide, an estimated 3.6 million households spent an average \$257 per household in 2003.
- Also in 2003, the average household travel party size for statewide visitors was 2.1 persons, yielding an average tourism expenditure of \$122 per person.