

2005 Delaware Visitor Profile Study

(Based on results of TravelScope® and TIA TravelScope/DIRECTIONS® by DK&LA)

*Kent County
New Castle County
Sussex County*



Delaware Economic Development Office
Industry Research Section
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2005 Delaware Visitor Profile Study

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INTRODUCTION

The following visitor profile for Delaware focuses exclusively on tourism which includes 2005 data for Kent County, New Castle County, and Sussex County. In previous years, separate studies were done on each county and comparisons were made from year to year, but beginning in 2005, a new benchmark will be made due to utilizing a different program and different methodologies. 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.

- 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

Total number of projected person-trips

- ❖ Kent County – 2.70 million
 - ❖ New Castle County – 2.72 million
 - ❖ Sussex County – 2.65 million
-

Overnight / Day Trips

- ❖ Forty-seven percent of Kent County person-trips were overnight; 53% were day trips
 - ❖ Thirty-seven percent of New Castle County person-trips were overnight; 63% were day trips
 - ❖ Seventy-two percent of Sussex County person-trips were overnight; 28% were day trips
-

Leisure / Business Trips

- ❖ Ninety-two percent of Kent County person-trips were leisure; 8% was business
 - ❖ Seventy-seven percent of New Castle County person-trips were leisure; 23% was business
 - ❖ Ninety percent of Sussex County person-trips were leisure; 10% was business
-

Top states of origin (other than Delaware)

- ❖ Kent County – Maryland and Virginia (16%); Pennsylvania (10%); New Jersey (7%)
 - ❖ New Castle County - New Jersey (38%); Pennsylvania (18%); Maryland (11%)
 - ❖ Sussex County - Maryland (30%); Pennsylvania (18%); New Jersey (14%)
-

Primary Purpose of Trip

- ❖ Kent County – other leisure (56%); visit friends or relatives (16%); general vacation (13%)
 - ❖ New Castle County – other leisure (40%); visit friends or relatives (31%); other business (15%)
 - ❖ Sussex County – getaway weekend (29%); general vacation (24%); visit friends or relatives (23%)
-

Mode of Transportation:

- ❖ Personal auto travel remained the dominant form of transportation to Delaware's counties
 - Kent County – 88%
 - New Castle – 80%
 - Sussex County – 86%
-

Trip Duration:

- ❖ Kent County overnight person-trips – one night (21%); two nights (17%) three nights (4%)
- ❖ New Castle County overnight person-trips – one night (9%); two nights (17%); three nights (3%)
- ❖ Sussex County overnight person trips – one night (19%) two nights (28%); three nights (7%)

Lodging

- ❖ Seventy-five percent of overnight visits to Kent County included a stay in a hotel, motel, resort, or all suite motel; 14% stayed in a private home
 - ❖ Sixty-one percent of overnight visits to New Castle County included a stay in a hotel, motel, resort, or all suite motel; 38% stayed in a private home
 - ❖ Thirty-five percent of overnight visits to Sussex County included a stay in a hotel, motel, resort, or all suite motel; 29% stayed in a private home
-

Activities on a Trip

- ❖ Kent County – gambling (39%); entertainment (36%); dining (29%)
 - ❖ New Castle County – dining (40%); shopping (23%); entertainment (16%)
 - ❖ Sussex County – beach/waterfront (40%); dining (39%); shopping (32%)
-

Number of Persons on a Trip

- ❖ Kent County – two people (62%); one person (15%)
 - ❖ New Castle County – two people (51%); one person (21%)
 - ❖ Sussex County – two people (33%); one person (13%)
-

Expenditures

- ❖ Kent County – between \$5-\$99 (27%); \$500+ (22%); \$100-\$249 (20%)
 - ❖ New Castle County – between \$250-\$499 (41%); between \$0-\$4 (24%); between \$5-\$99 (13%)
 - ❖ Sussex County – between \$100-\$249 (32%); between \$250-\$499 (28%); \$500+ (22%)
-

Education of Visitors

- ❖ Kent County – graduated high school (48%); attended college (30%); college post grad (13%); graduated college (7%)
 - ❖ New Castle County – graduated high school (33%); college post grad (27%); graduated college (20%); attended college (19%)
 - ❖ Sussex County – graduated high school (30%); attended college (27%); graduated college (23%); college post grad (18%)
-

Occupation of Visitors

- ❖ Kent County – retired/student/other (40%); tech/sales/admin (23%); manager/prof (21%); service (8%); craftsman/repairman (7%); operator/laborer (2%)
 - ❖ New Castle County – retired/student/other (31%); manager/prof (26%); tech/sales/admin (18%); craftsman/repairman (15%); service (9%); operator/laborer (1%)
 - ❖ Sussex County – manager/prof (33%); retired/student/other (32%); tech/sales/admin (18%); service (10%); operator/laborer (7%)
-

Employment of Visitors

- ❖ Kent County – full-time (51%); retired (31%); part-time (12%); not employed (6%)
 - ❖ New Castle County – full-time (75%); retired (16%); not employed (7%); part-time (2%)
 - ❖ Sussex County – full-time (61%); retired (18%); not employed (11%); part-time (10%)
-

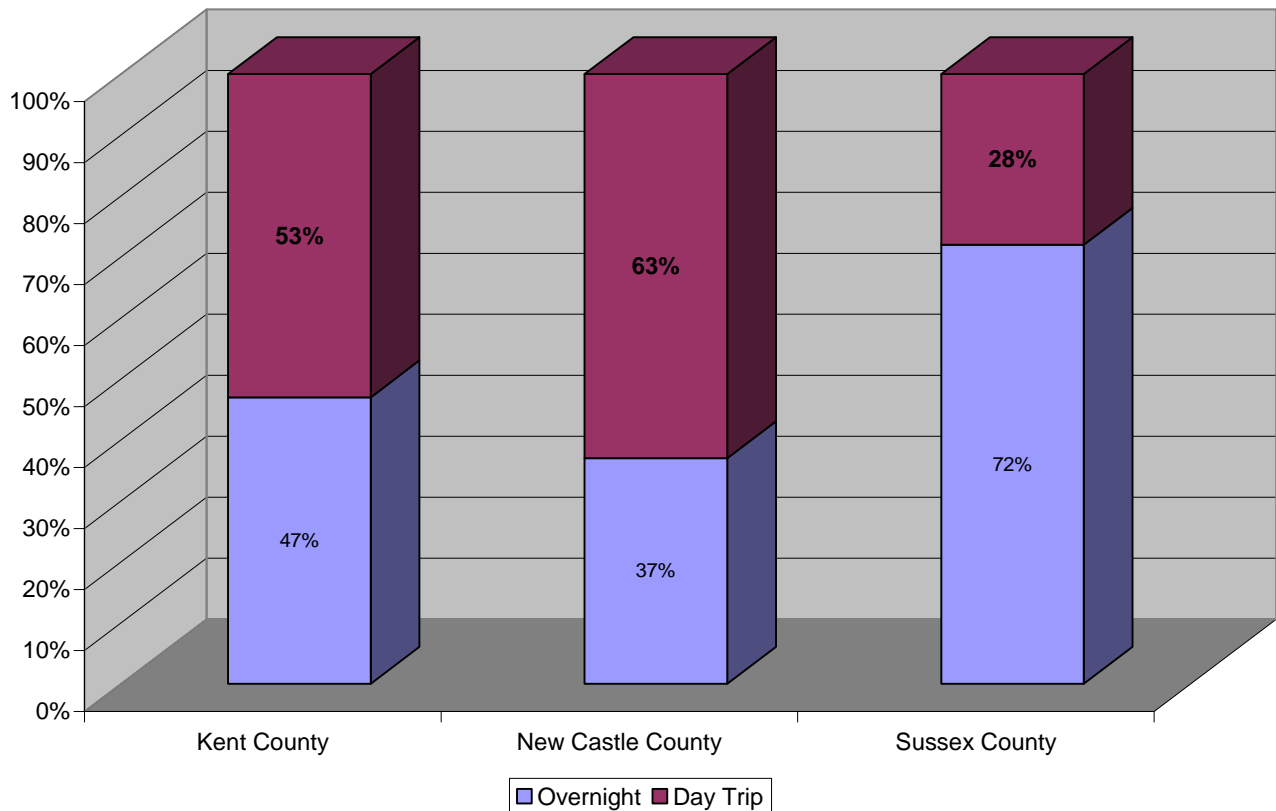
VISITOR VOLUME

The total number of projected person-trips to Kent County – 2.70 million; New Castle County – 2.72 million; and Sussex County – 2.65 million.

Destination/overnight visitors were either specifically visiting Delaware for a day or stayed at least one night, meaning they were not just passing through the county. Intuitively, these visitors have more impact on the county and state economies.

The chart below represents overnight and day trips to Delaware’s counties in 2005.

Overnight and Day Trips 2005



Quarterly and Monthly Visitor Volume

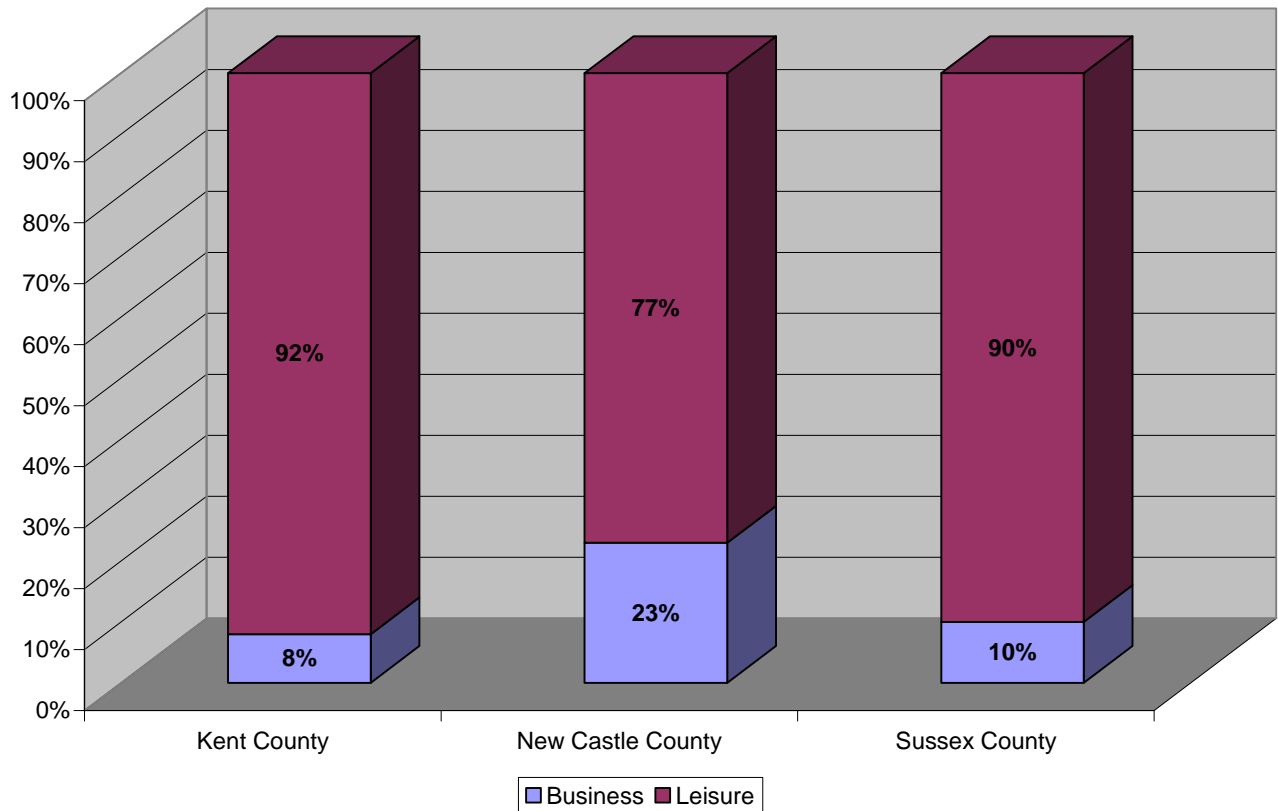
The third quarter (the quarter the trip started), including the months of July, August, and September, was the most popular quarter for visitors to Delaware. July was the highest month of travel (month trip started) for Kent County and Sussex County, and November was highest month of travel for New Castle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

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

Business and Leisure Visitor Volume

A total of 6.3 million leisure person-trips and 1.7 million business person-trips were taken to Delaware in 2005. The chart below depicts the percentages for Delaware, Kent County, New Castle County, and Sussex County in relation to leisure-person trips and business-person trips.

Leisure and Business Visitor Volume 2005

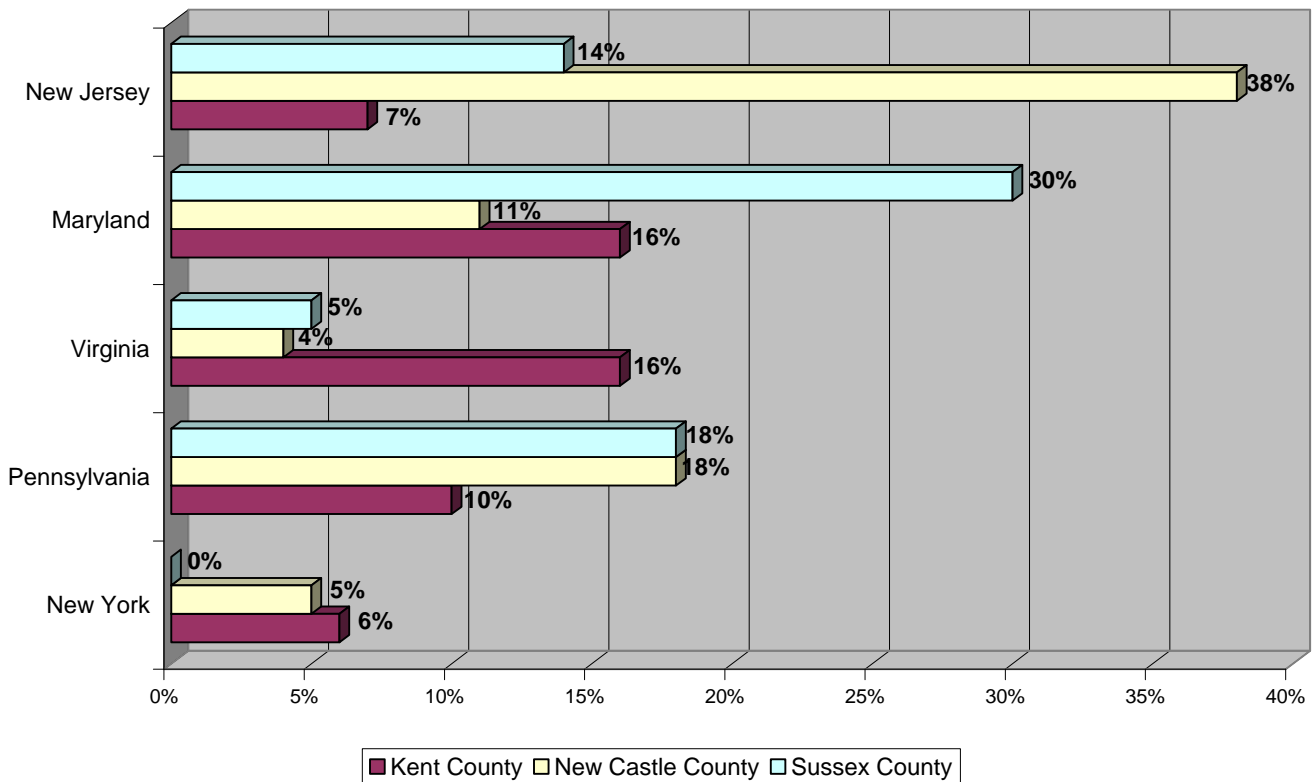


Top States of Origin

The top states of origin for Delaware visitors, other than Delaware, were Maryland (24%), New Jersey (16%), Pennsylvania (16%) and New York (6%)

The chart below depicts the state of origin for Kent County, New Castle County and Sussex County.

State of Origin 2005



TRIP CHARACTERISTICS

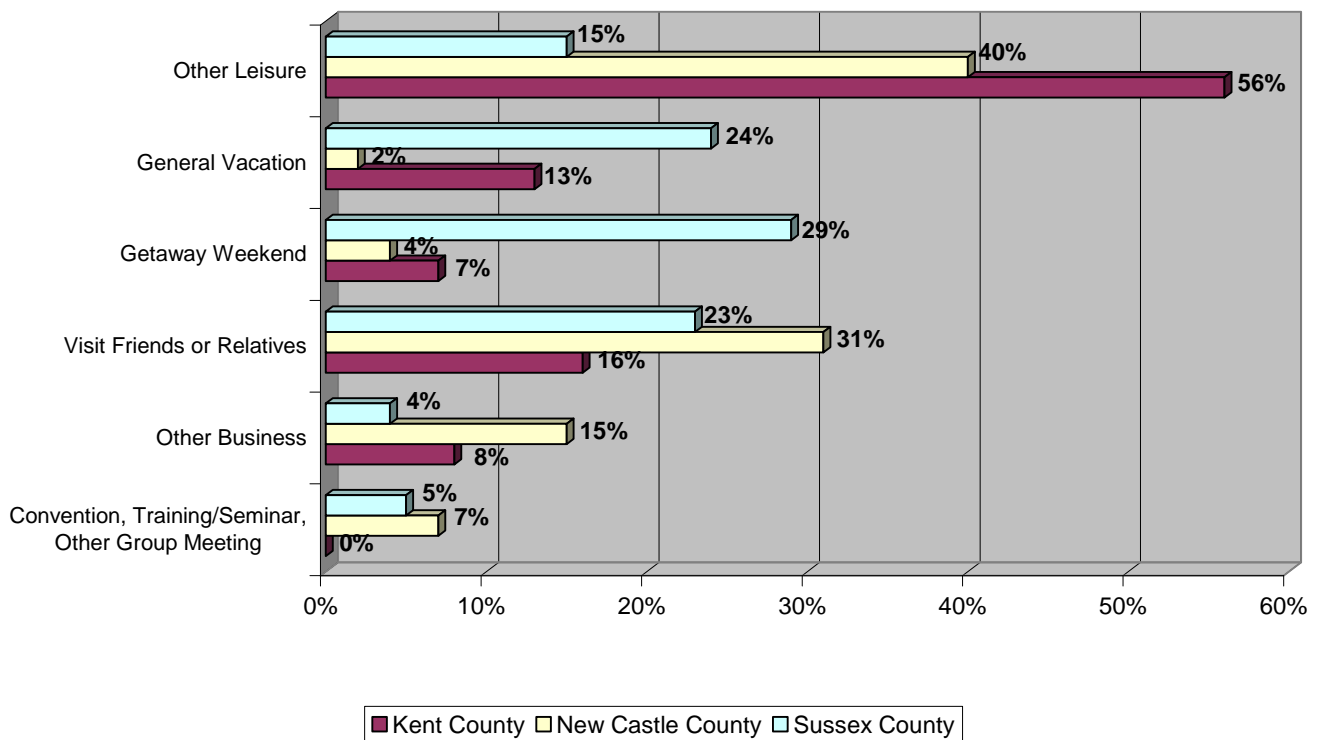
This section of the report contains detailed characteristics of destination/overnight trips. Characteristics include primary purpose of trip, primary mode of transportation, travel party composition, trip duration, overnight lodging use, trip activities, and trip expenditures.

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 was the most popular trip purpose for travelers to Delaware in 2005.

The chart below depicts the primary purpose of trip for Delaware’s counties in 2005.

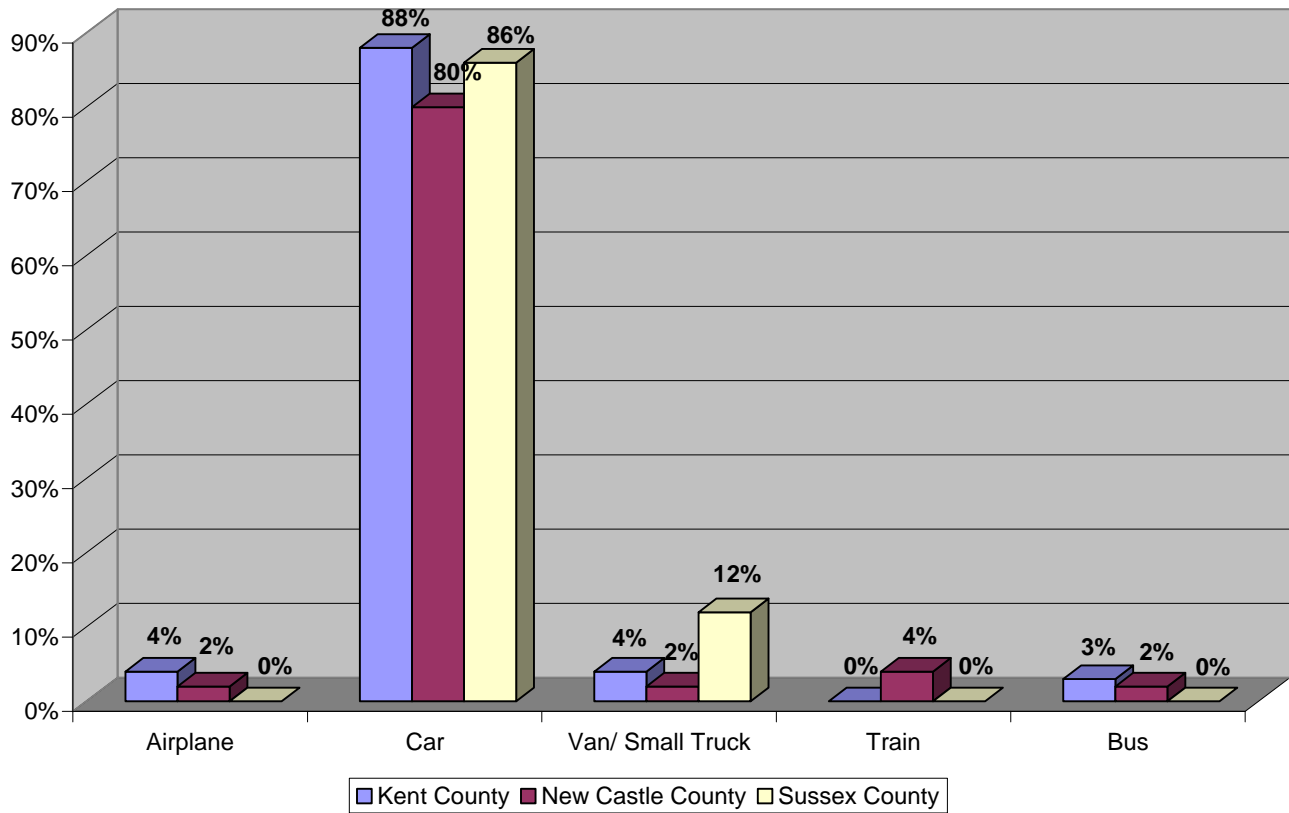
Primary Purpose of Trip 2005



Primary Mode of Transportation

The dominant form of transportation to Delaware was personal auto travel, accounting for 92% of person-trips in 2005. The chart below represents the primary modes of transportation made to Delaware’s counties in 2005.

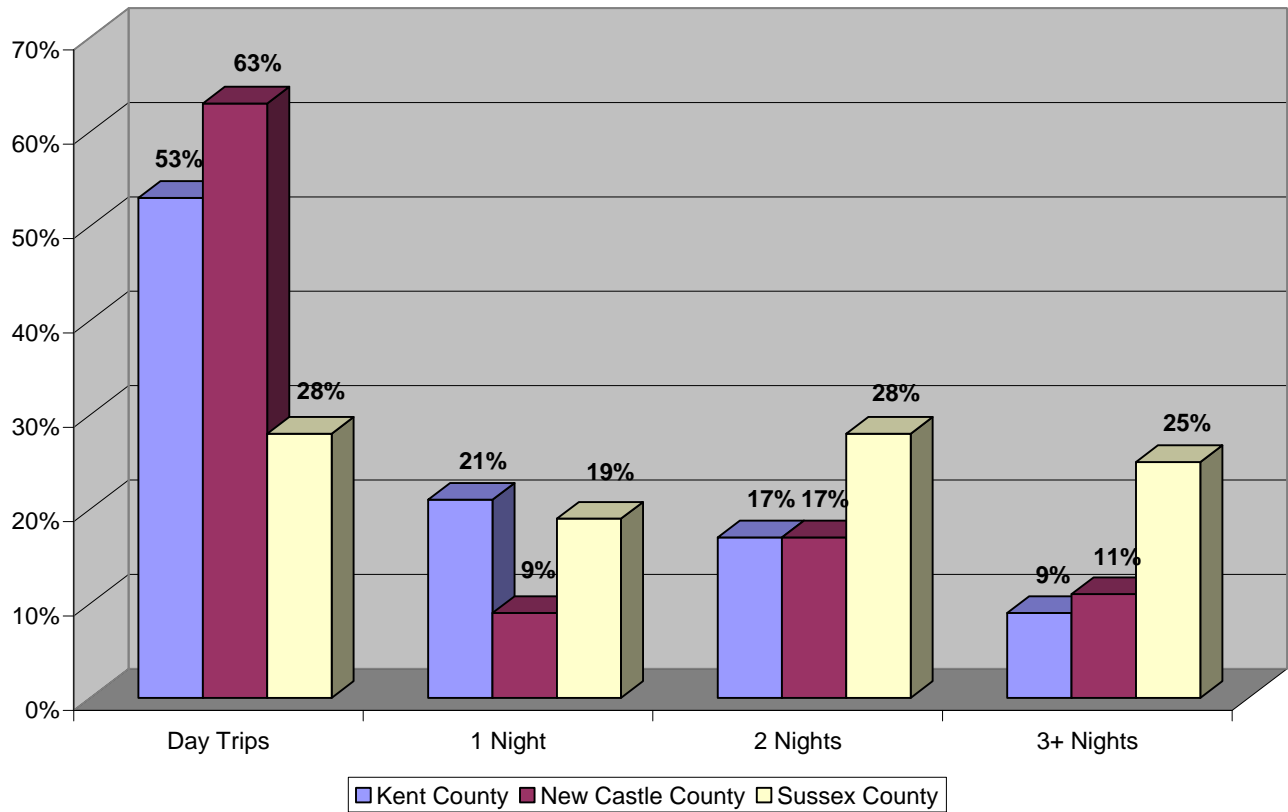
Mode of Transportation 2005



Trip Duration

Fifty-nine percent of travel to Delaware in 2005 were day trips. Forty-one percent of visitors spent one or more nights per trip. The table below represents the trip duration for Delaware's counties in 2005.

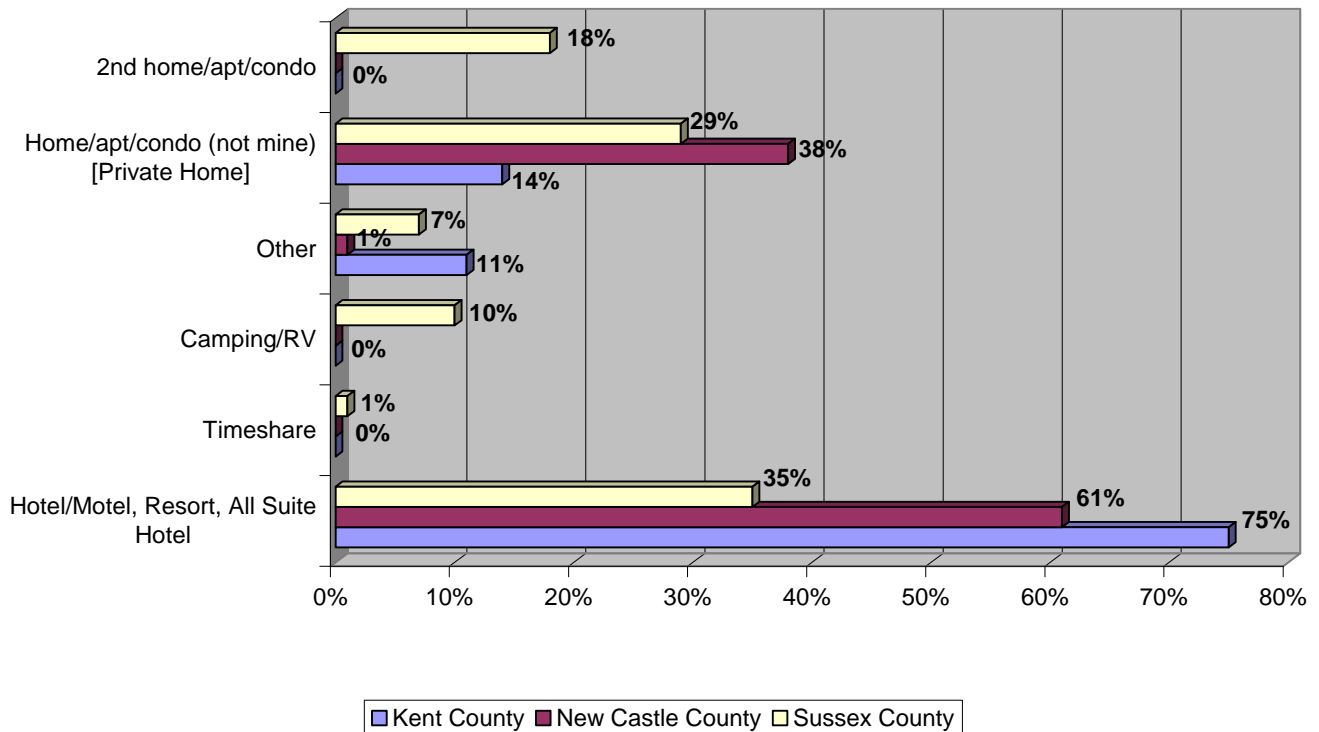
Trip Duration 2005



Lodging Use

Hotels, motels, resorts and all suite hotels were the most popular type of lodging for overnight trips to Delaware in 2005 (48%). The chart below represents lodging in Delaware's counties.

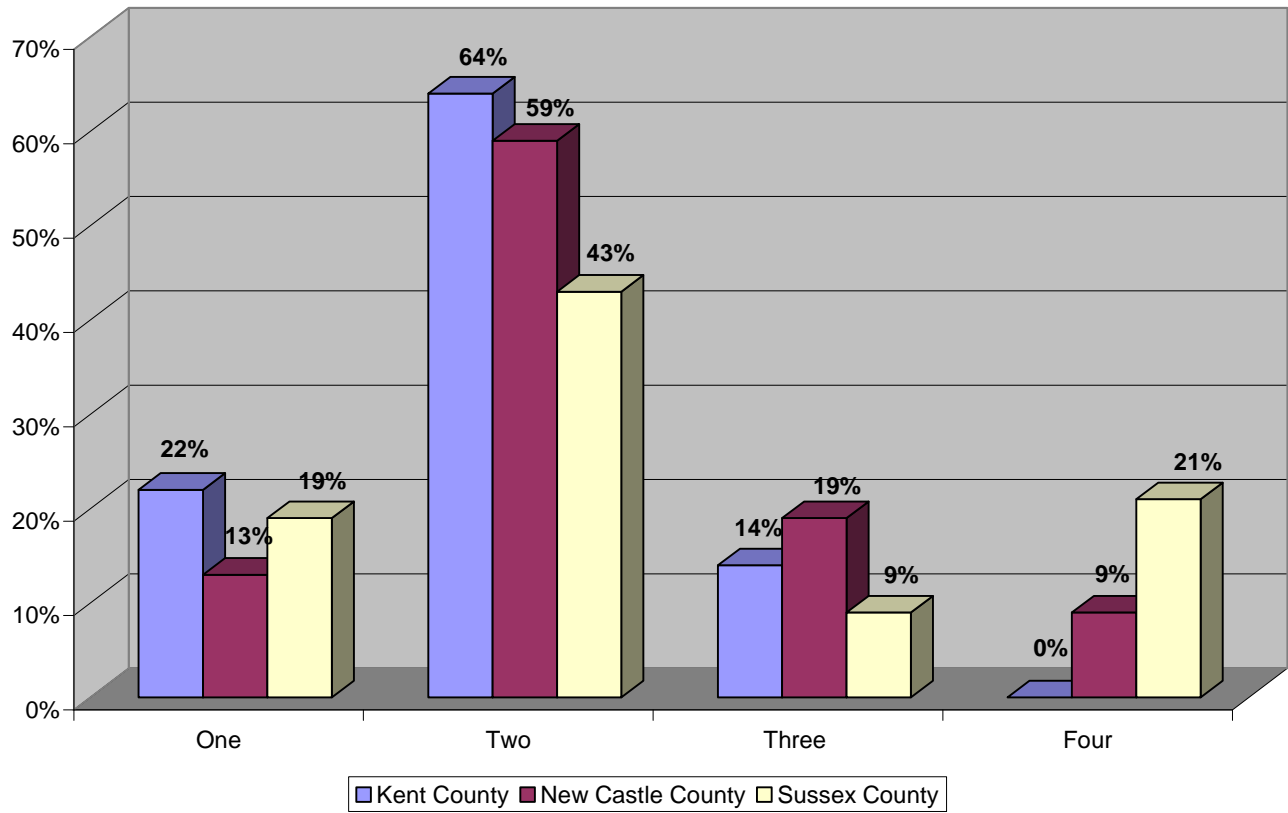
Lodging 2005



Travel Party Size

The number of persons on a trip to Delaware in 2005 was primarily two people. The chart below represents the number of persons on a trip to Delaware's counties.

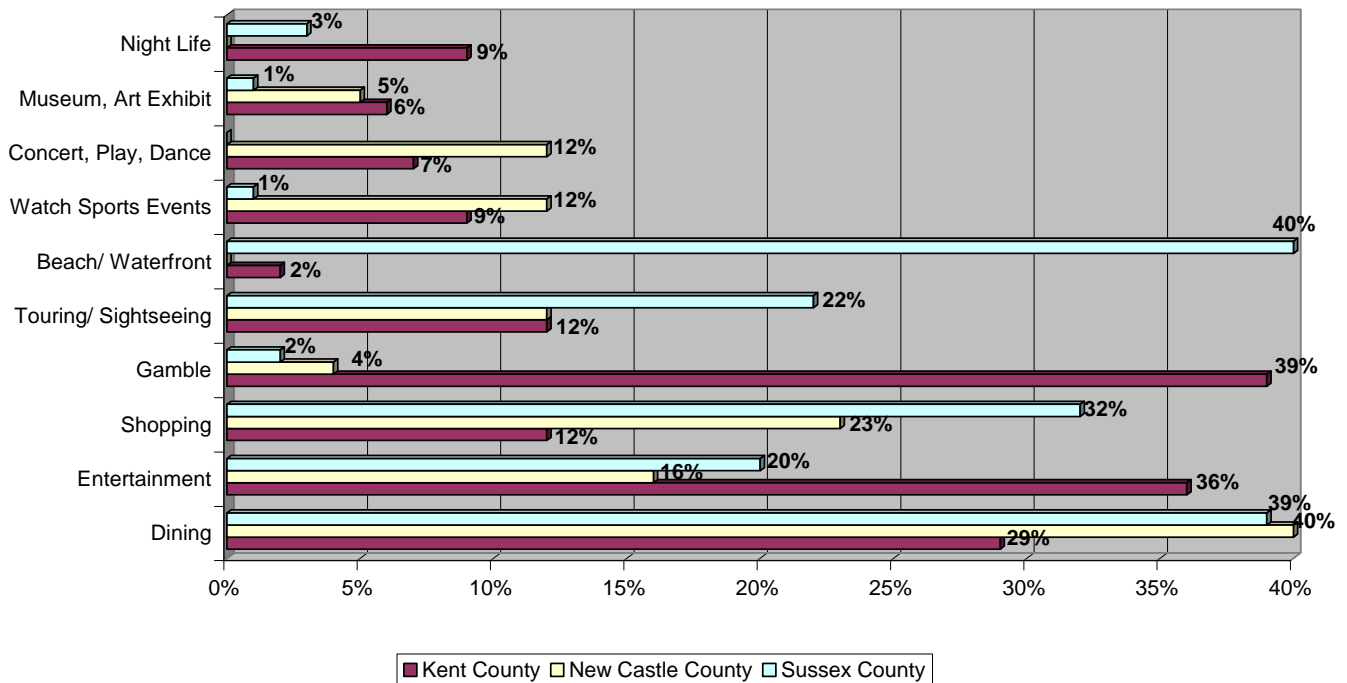
Travel Party Size 2005



Activities

Dining out was the most popular activity for Delaware travelers in 2005 (40%). The chart below represents activities for Delaware's counties in 2005.

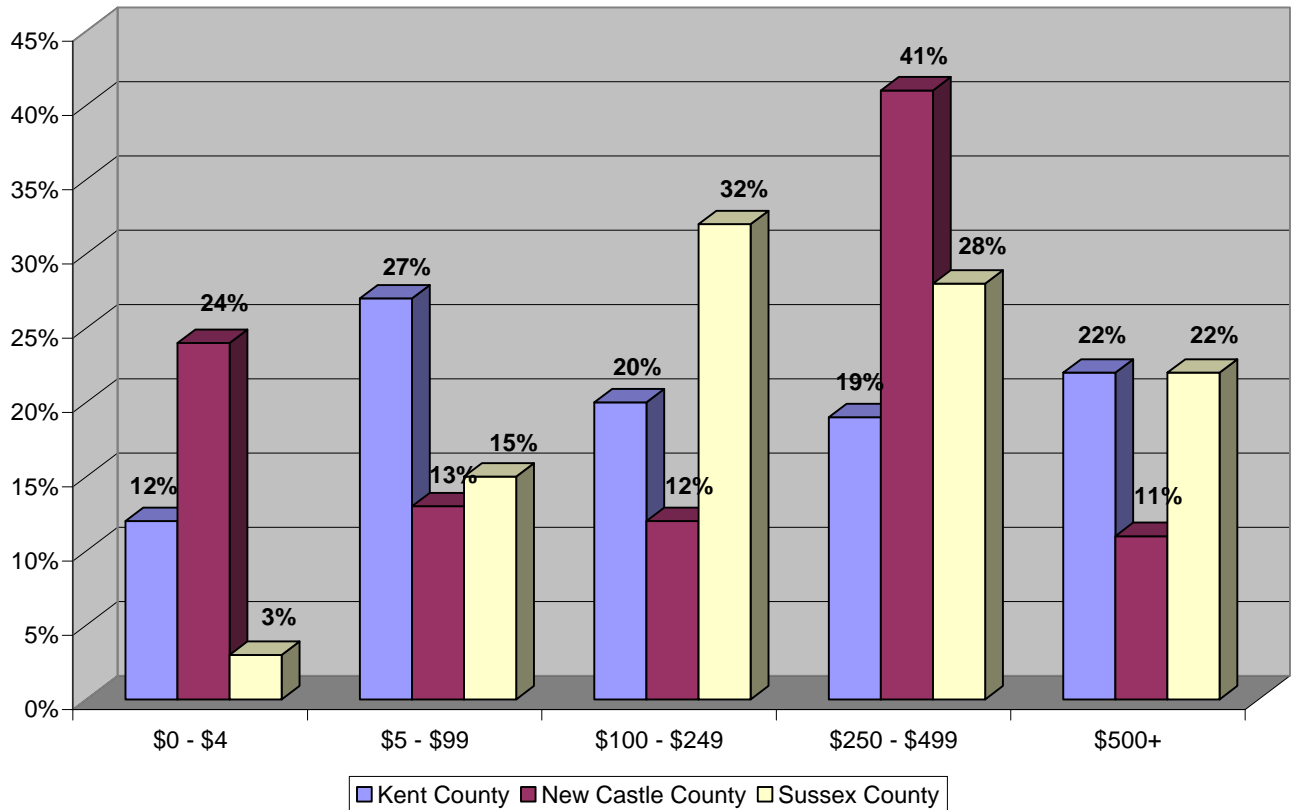
Activities 2005



Trip Spending

Visitors spent an average of \$270 during their trips to Delaware in 2005 (not including transportation costs). The chart below represents trip expenditures in Delaware’s counties in 2005.

Trip Spending 2005



DEMOGRAPHICS

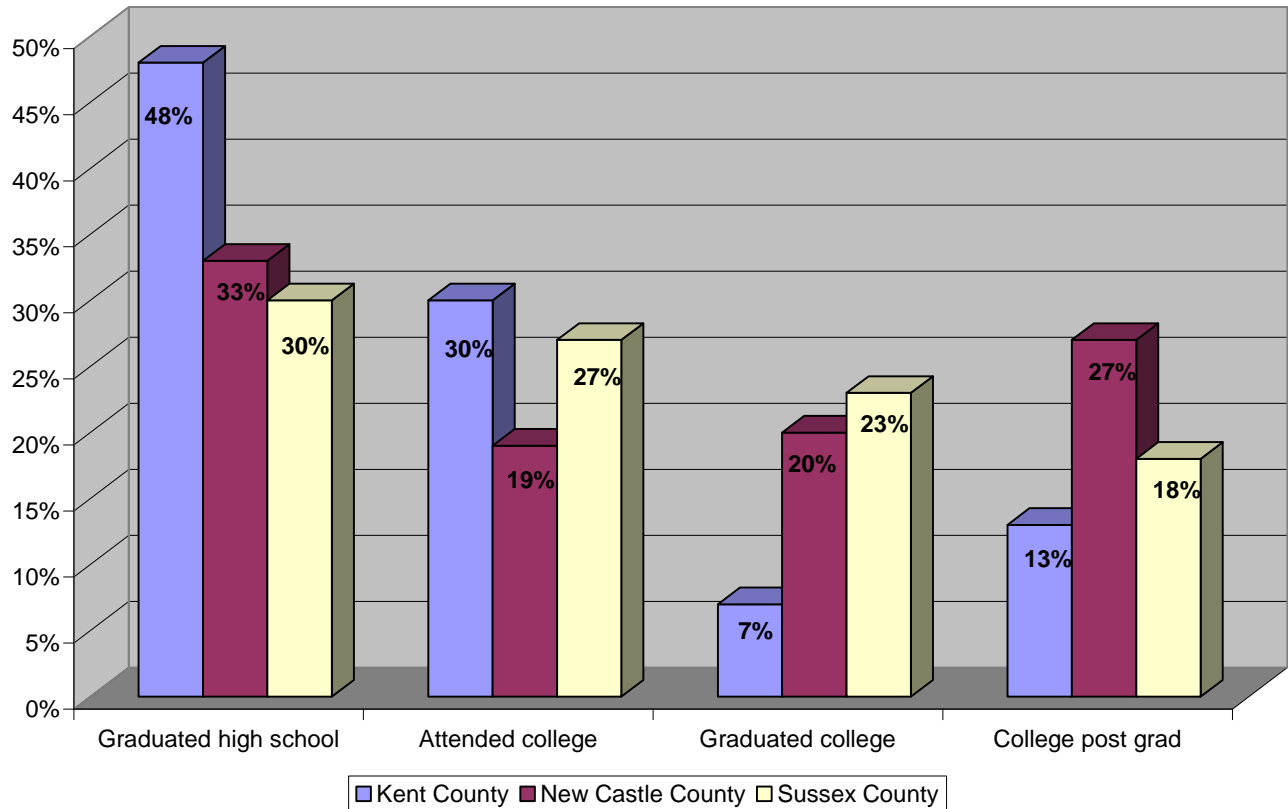
About half of destination/overnight households visiting Delaware had two members in the household; more than half were married. Parents accounted for more than half of visitors to Delaware. The average age of Delaware residents in 2005 was 49.

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

Education of Delaware Visitors

At least six out of ten (65%) Delaware trips were taken by households with a primary traveler who had some college education. The chart below represents the education level of visitors to Delaware's counties in 2005.

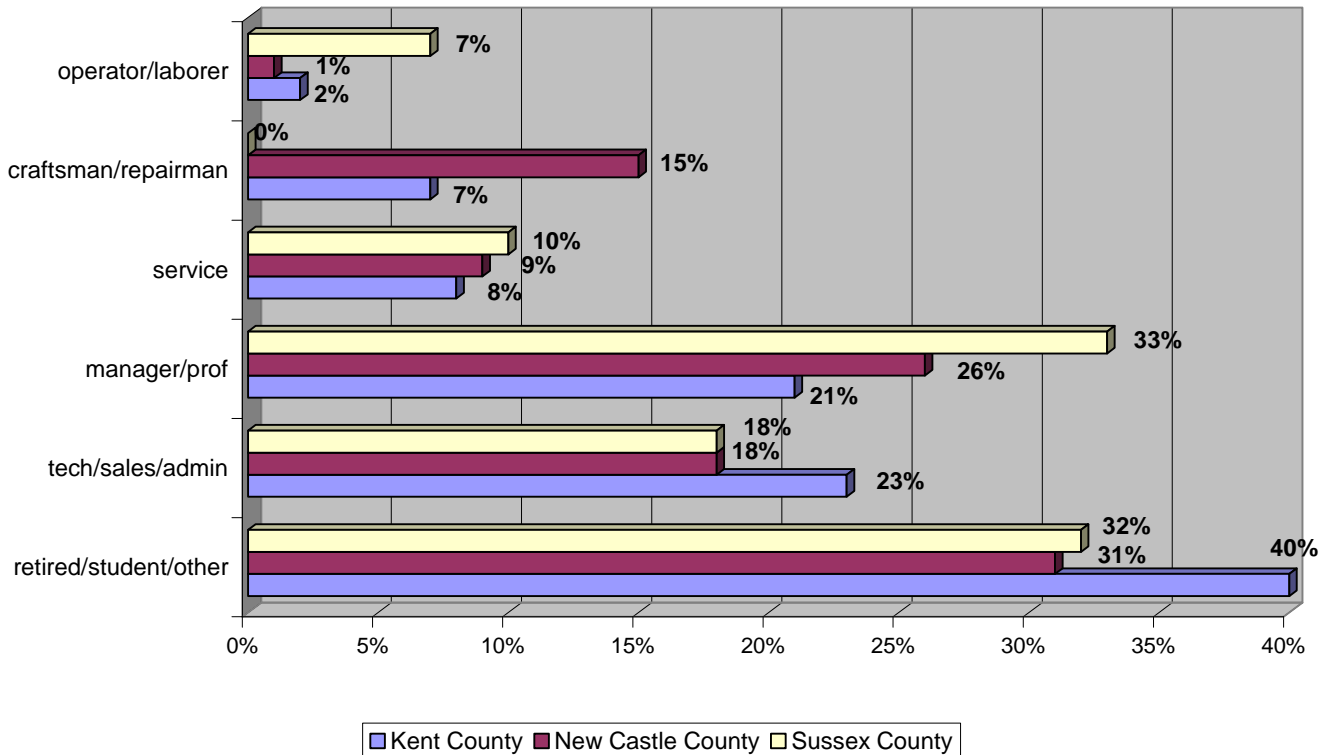
Education 2005



Occupation of Delaware Visitors

The largest part of respondents who visited Delaware in 2005 was either retired or a student. The chart below represents the occupation of the respondents who visited Delaware in 2005.

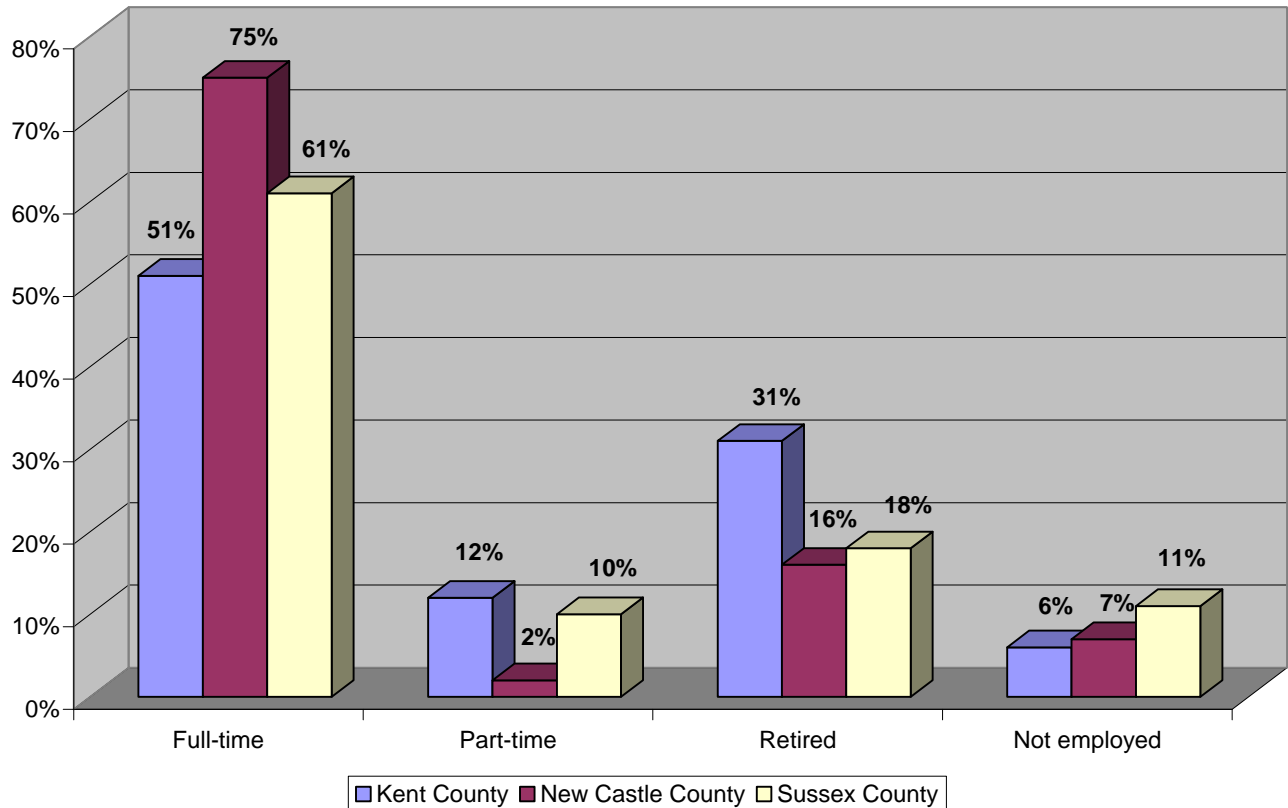
Occupation 2005



Employment Delaware Visitors

The majority of visitors to Delaware in 2005 were employed full-time. The chart below represents the employment status of visitors to Delaware's counties in 2005.

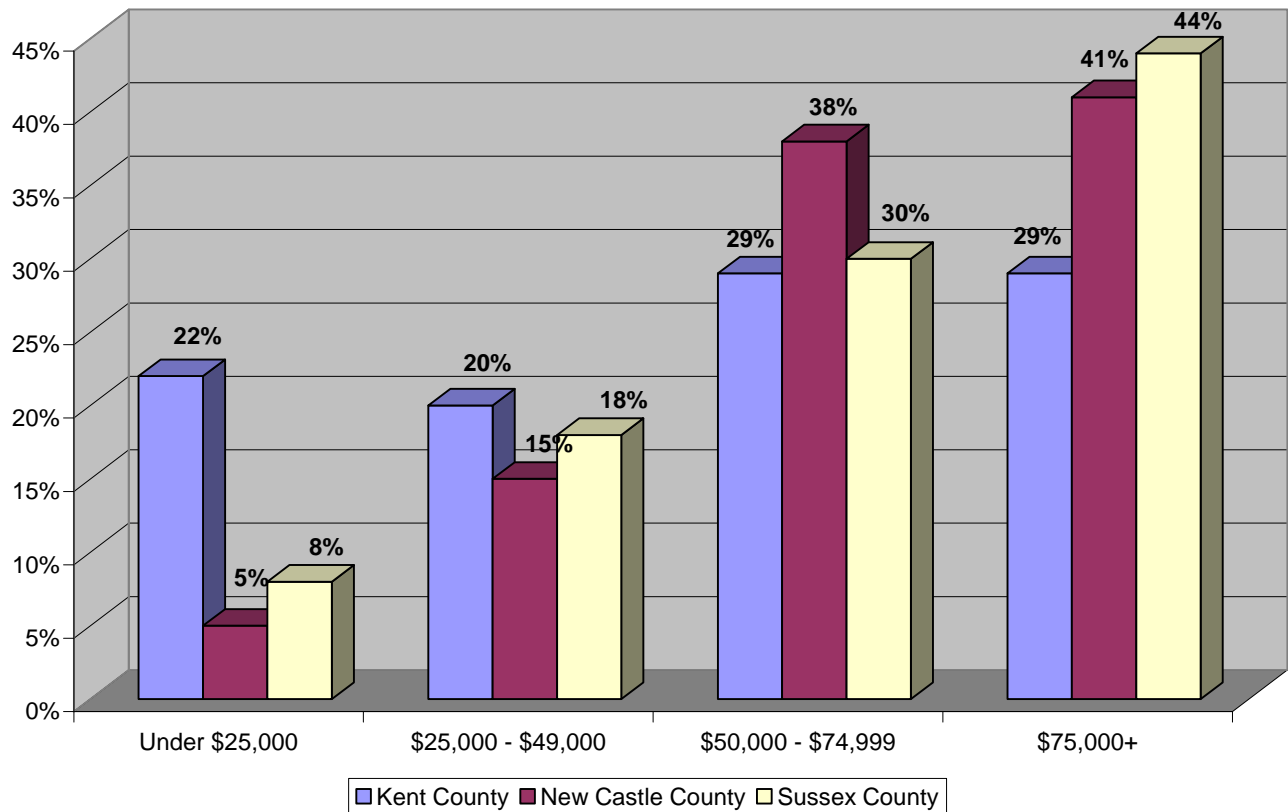
Employment 2005



Income of Delaware Visitors

The average income of households visiting Delaware was \$67,694 in 2005. The chart below represents the income of households visiting Delaware's counties in 2005.

Income 2005



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.