

# *2004 Visitor Profile Study*

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## *Kent County*



Delaware Economic Development Office  
Industry Research Section  
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# **2004 Kent County Visitor Profile Study**

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*Pictured on the cover: Delaware State Fair in Harrington, DE*

## **INTRODUCTION**

The following visitor profile for Kent County is one of three studies for Delaware focusing exclusively on tourism. This profile includes data for 2004 and, where appropriate, comparisons to 2003. Similar studies are available for Sussex and New Castle Counties. Using TravelScope, developed by the Travel Industry Association of America (TIA) and discussed further in the Methodology section, the following visitor profile was developed for Kent County.

- This visitor profile includes aggregated totals for 12 city codes available in TravelScope which represent 12 communities in Kent County.
- This visitor profile is based on total projected trips (including pass-through visitors) and destination/overnight stays for Kent County.
- In some instances, data is presented annually and 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.

## **EXECUTIVE SUMMARY**

The total number of person-trips to Kent County in 2004 was 1.05 million, an increase of 9 percent over 961,000 in 2003.

Eighty-eight percent of total Kent County person-trips were destination/overnight person-trips; twelve percent were pass-throughs. Destination/overnight visitor volume to Kent County was 926,000 in 2004, an increase of 7 percent over 862,000 in 2003.

### **Profile of Destination/Overnight Travel to Kent County**

- A total of 752,000 leisure person-trips and 171,000 business person-trips were taken to Kent County in 2004, 81 and 19 percent of total person-trip responses, respectively.
- Maryland remained the top state of origin of Kent County visitors in 2004.
- Personal auto travel remained the dominant form of transportation to Kent County, accounting for 85 percent of person-trips to Kent County in 2004.
- More than half (68%) of travel to Kent County included one or more overnight stays in 2004; thirty-two percent of Kent County destination/overnight person-trips were day trips.
- The average number of nights for overnight person-trips in 2004 was 2.91, a decrease from 3.62 in 2003.
- Sixty-one percent of overnight visits to Kent County included a stay in a hotel, motel, or B&B.
- The average destination/overnight travel party included 1.9 people from the household in 2004.
- Gambling remained the most popular activity for Kent County visitors, with 39 percent of Kent County destination/overnight person-trips including gambling.
- Destination/overnight households visiting Kent County spent an average of \$366 during their stay in the county.

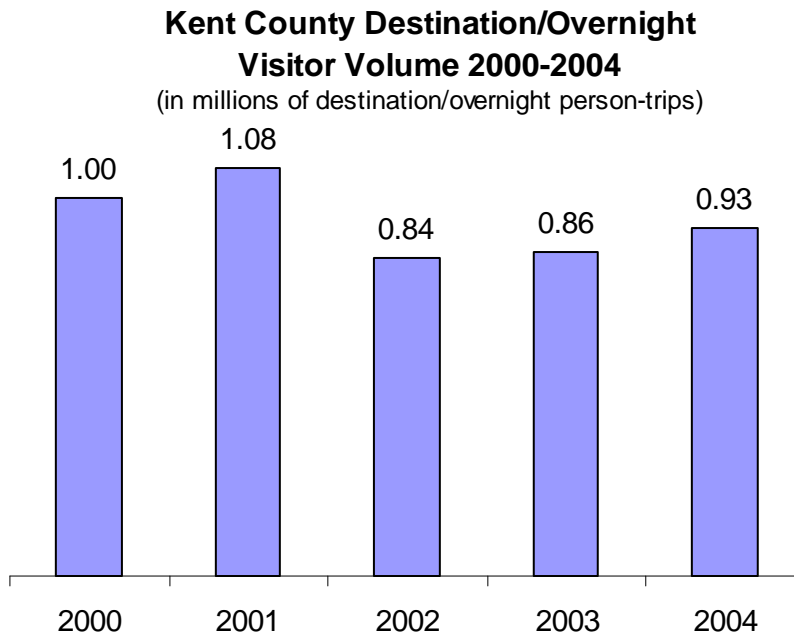
## **VISITOR VOLUME**

Visitor volumes – total person-trips and destination/overnight person-trips – are examined in this section of the profile.

The total number of person-trips to Kent County in 2004 was 1.05 million, an increase of 9 percent over 961,000 in 2003.

Eighty-eight percent of total Kent County person-trips were destination/overnight person-trips; twelve percent were pass-throughs. Destination/overnight visitors were either specifically visiting Kent County 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 and will be the focus of the remainder of the section.

Destination/overnight visitor volume to Kent County was 926,000 in 2004, an increase of 7 percent over 862,000 in 2003.



### Quarterly Visitor Volume

The second quarter, including the months of April, May, and June, was the most popular quarter for Kent County travel. Thirty-six percent of trips occurred during this period in 2004, down from 42 percent in 2003.

Timeframe	2003	2004	Change
Quarter 1 (Jan., Feb., Mar.)	11%	10%	-1%
Quarter 2 (Apr., May, Jun.)	42%	36%	-6%
Quarter 3 (Jul., Aug., Sep.)	34%	24%	-10%
Quarter 4 (Oct., Nov., Dec.)	13%	30%	+17%
Summer (Jun., Jul., Aug.)	41%	26%	-15%

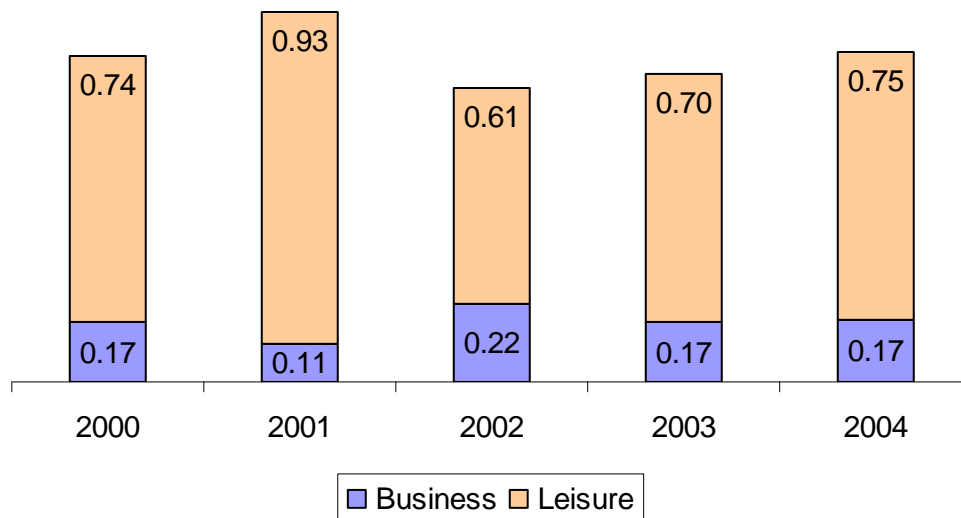
### Business and Leisure Visitor Volume

A total of 752,000 leisure person-trips and 171,000 business person-trips were taken to Kent County in 2004, 81 and 19 percent of total person-trip responses, respectively. Leisure travel volume increased 7 percent from 2003 to 2004; business travel volume was essentially unchanged.

#### Kent County Business/Leisure

#### Visitor Volume Trends 2000-2004

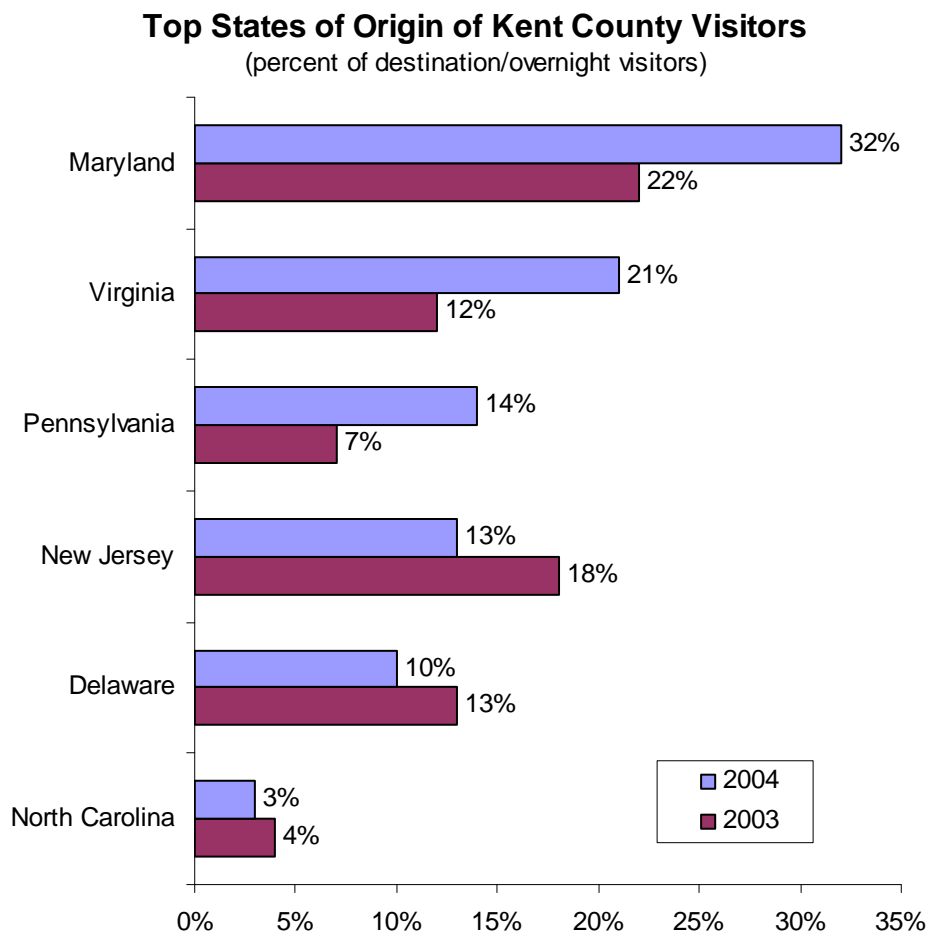
(in millions of destination/overnight person-trips)



## Top States of Origin

Maryland remained the top state of origin of Kent County visitors in 2004. The share of destination/overnight person-trips from Maryland increased to 32 percent from 22 percent in 2003.

Other top states of origin of Kent County destination/overnight visitors in 2004 included Virginia (21%), Pennsylvania (14%), New Jersey (13%), and North Carolina (3%). These five states provided 83 percent of Kent County destination/overnight person-trips. An additional ten percent of destination/overnight visitors to Kent County were from Delaware.



### Visitor Volume Summary Table

	<b>Kent County</b>	<b>New Castle County</b>	<b>Sussex County</b>	<b>State of Delaware</b>
<b>Total Visitor Volume (including pass-throughs)</b>	1.05 million	1.73 million	2.92 million	12.54 million
<b>Total Destination/Overnight Visitor Volume</b>				
Total	0.93 million	1.48 million	2.69 million	6.56 million
Quarter 1 (Jan., Feb., Mar.)	10%	18%	6%	12%
Quarter 2 (Apr., May, Jun.)	36%	23%	24%	26%
Quarter 3 (Jul., Aug., Sep.)	24%	23%	54%	38%
Quarter 4 (Oct., Nov., Dec.)	30%	36%	16%	24%
Summer (Jun., Jul., Aug.)	26%	20%	58%	39%
<b>Business/Leisure Visitor Volume</b>				
Business (net)	0.17 million	0.32 million	0.15 million	0.79 million
Leisure (net)	0.75 million	1.16 million	2.53 million	5.75 million
<b>Top States of Origin</b>				
	1. MD: 32%	1. NJ: 22%	1. MD: 40%	1. MD: 31%
	2. VA: 21%	2. MD: 16%	2. PA: 20%	2. PA: 16%
	3. PA: 14%	3. NC: 9%	3. NJ: 6%	3. NJ: 12%
	4. NJ: 13%	4. PA: 8%	4. VA: 6%	4. VA: 9%
	5. NC: 3%	5. NY: 7%	5. DC: 5%	5. DC: 3%
	DE: 10%	DE: 9%	DE: 13%	DE: 11%

## **TRIP CHARACTERISTICS**

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

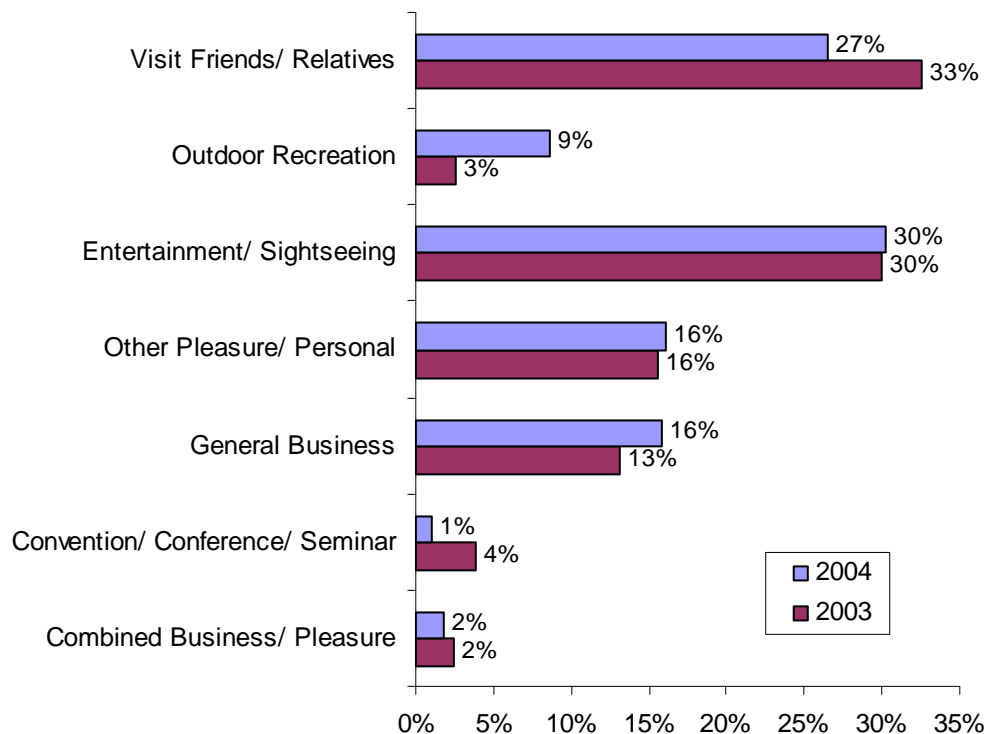
### **Primary Purpose of Trip**

Leisure travel purposes include visiting friends or relatives, outdoor recreation, entertainment/sightseeing, and other pleasure/personal reasons. Entertainment and sightseeing replaced visiting friends and relatives as the most frequent trip purpose for destination/overnight person-trips to Kent County in 2004; thirty percent of person-trips were for this purpose in 2004. Visiting friends and relatives accounted for 27 percent of destination/overnight person-trips to Kent County in 2004. Sixteen percent of travel to the county was for other personal/pleasure purposes while outdoor recreation accounted for nine percent.

Business travel purposes include general business, convention/conference/seminar attendance, and combined business/pleasure. General business purposes accounted for 16 percent of destination/overnight person-trips to Kent County in 2004. Two percent of county travelers combined business and pleasure travel, and relatively few (1%) destination/overnight visitors traveled to Kent County for conventions, conferences, or seminars.

#### **Primary Purpose of Trip for Kent County Visitors**

(percent of destination/overnight person-trips)

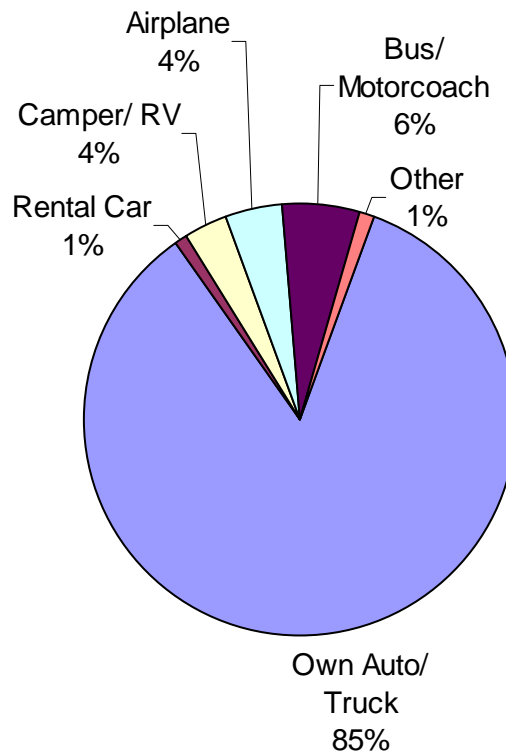


## Primary Mode of Transportation

The dominant form of transportation to Kent County remained personal auto travel, accounting for 85 percent of person-trips to Kent County in 2004. Six percent of destination/overnight person-trips were made by bus or motorcoach. Camper/RV travel and air travel both accounted for four percent of person-trips. Relatively fewer visitors traveled to Kent County by rental car (1%).

### Primary Mode of Transportation for Kent County Visitors in 2004

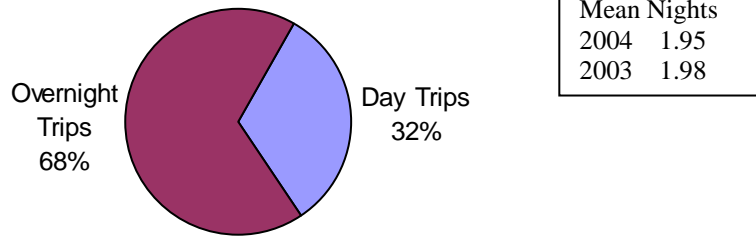
(percent of destination/overnight visitors)



## Trip Duration

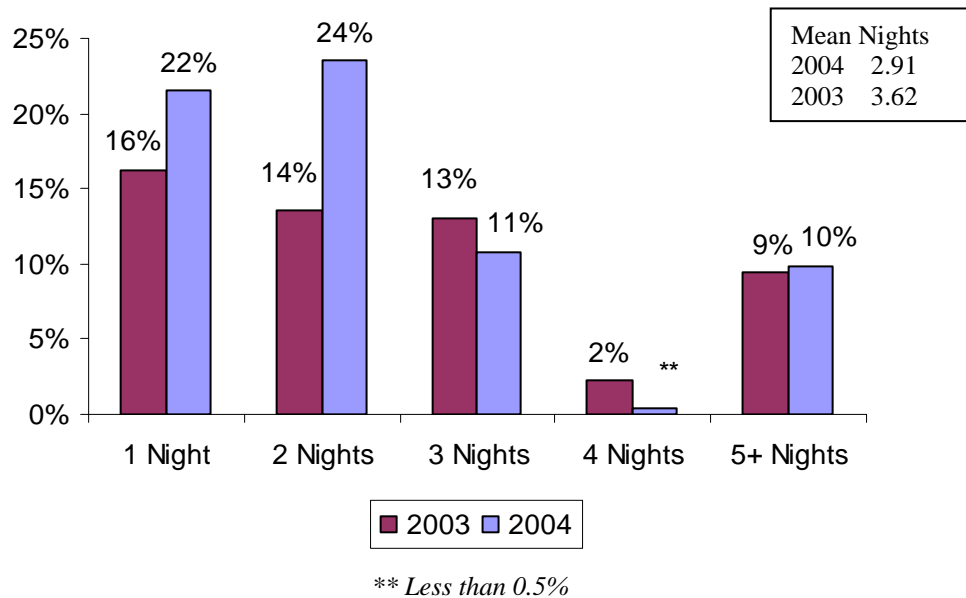
Nearly seventy percent (68%) of travel to Kent County included one or more overnight stays in 2004; thirty-two percent of Kent County destination/overnight person-trips were day trips. The share of day trip travel to Kent County in 2004 decreased from 45 percent in 2003. The average stay in Kent County in 2004 was 1.95, a slight decrease from 1.98 in 2003.

**Trip Duration in Kent County in 2004**  
(percent of destination/overnight person-trips)



Twenty-two percent of overnight person-trips to Kent County involved just one night in the county. Overnight stays of two and three nights accounted for 24 percent and 11 percent of overnight person-trips to Kent County, respectively. Virtually no trips involved stays of four nights; one in ten (10%) overnight person-trips to Kent County involved stays of five nights or longer, a slight increase from 9 percent in 2003. The average number of nights for overnight person-trips in 2004 was 2.91, a decrease from 3.62 in 2003.

**Overnight Trip Duration in Kent County**  
(percent of destination/overnight person-trips)

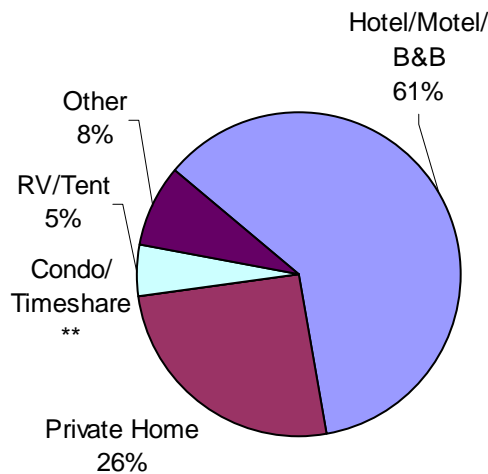


## Lodging Use

Hotels, motels, and B&Bs remained the most popular type of lodging for overnight trips to Kent County in 2004. Three in five (61%) overnight person-trips to Kent County included a stay in a hotel, motel, or B&B, an increase from 56 percent in 2003. Nearly thirty percent (26%) of overnight person-trips to Kent County in 2004 included a stay in a private home. RVs or tents were used by five percent of Kent County overnight visitors, and eight percent used another type of lodging.

### Lodging Use\* in Kent County in 2004

(percent of overnight person-trips)



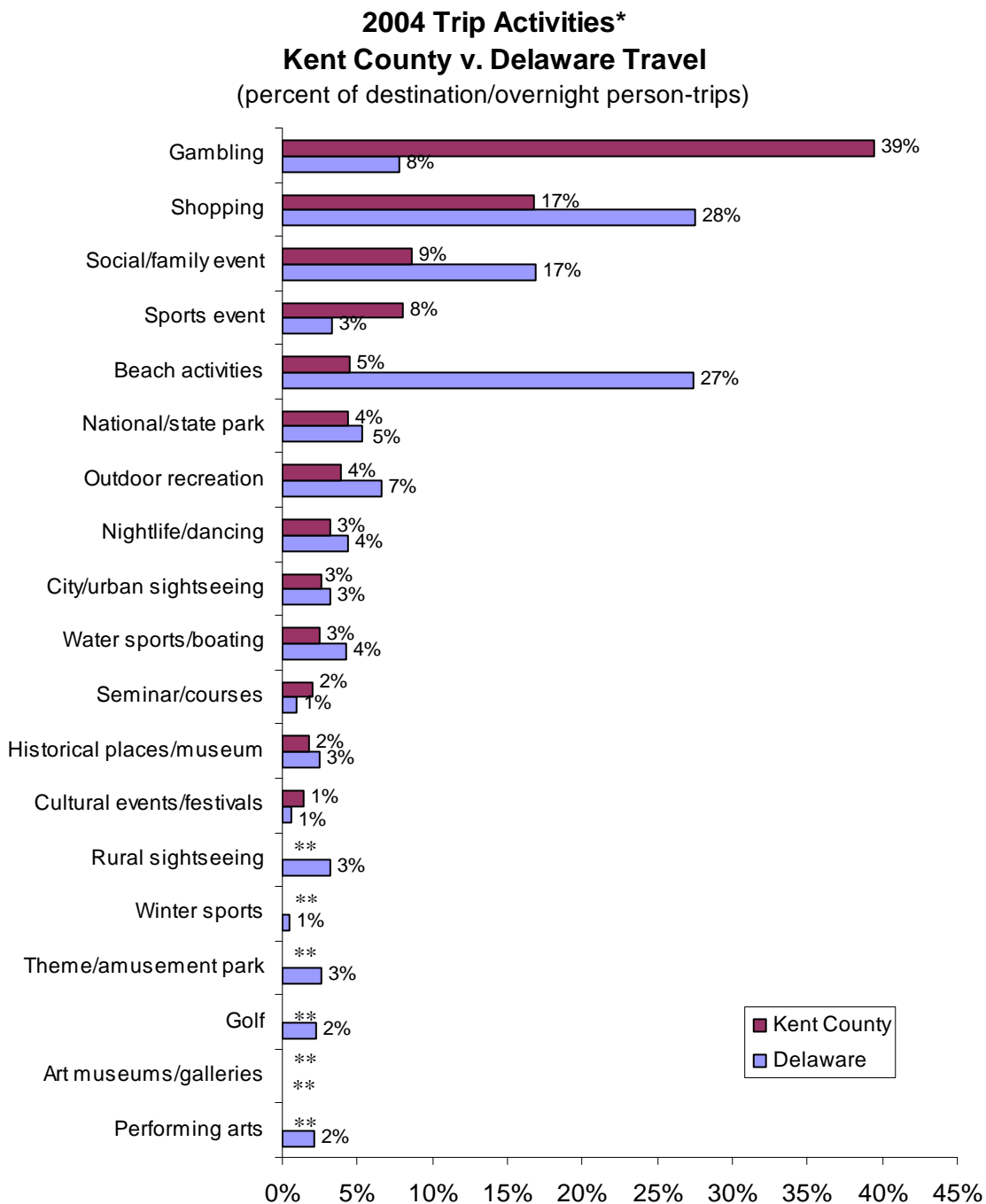
\* Multiple responses allowed. \*\* Less than 0.5%

## Travel Party Size

Thirty-eight percent of destination/overnight visitors to Kent County traveled alone in 2004. The average travel party included 1.9 people from the household in 2004.

## Activities

Gambling and shopping remained the most popular activities for Kent County visitors, with 39 percent of Kent County destination/overnight person-trips including gambling and 17 percent including shopping. Other popular activities included attending a social/family event (9%) and attending a sports event (8%).



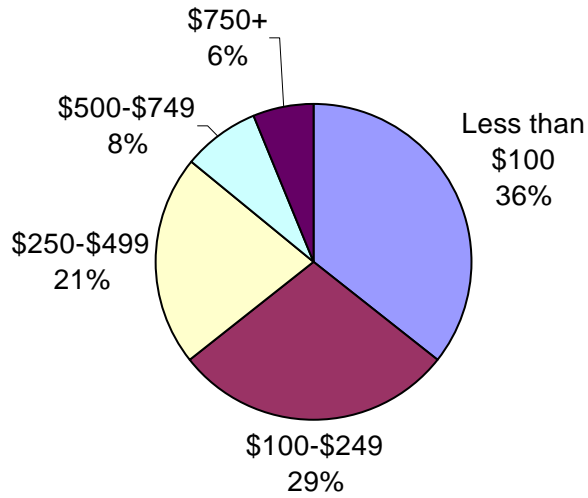
\*Multiple responses allowed. Note: \*\* Less than 0.5%

## Trip Expenditures

Average trip spending in Kent County increased in 2004. Households visiting Kent County on destination/overnight trips spent an average of \$366, 69 percent higher than 2003 (\$217). (This does not include transportation costs.)

### Trip Expenditures in Kent County in 2004

(percent of destination/overnight person-trips)



### Trip Characteristics Summary Table

	<b>Kent County</b>	<b>New Castle County</b>	<b>Sussex County</b>	<b>State of Delaware</b>
<b>Primary Purpose of Trip</b>				
LEISURE	81%	78%	94%	88%
Visit friends/relatives	27%	62%	31%	41%
Outdoor recreation	9%	2%	24%	14%
Entertainment/sightseeing	30%	6%	6%	10%
Other personal/pleasure	16%	8%	33%	22%
BUSINESS	19%	22%	6%	12%
General business	16%	17%	4%	9%
Convention/conference/seminar	1%	0%	0%	1%
Combined business/pleasure	2%	5%	2%	2%
<b>Primary Mode of Transportation</b>				
Own auto/truck	85%	70%	88%	82%
Rental car	1%	8%	3%	4%
Camper/RV	4%	1%	0%	1%
Airplane	4%	12%	4%	6%
Bus/motorcoach	6%	2%	0%	3%
Other	1%	7%	4%	4%
<b>Trip Duration</b>				
Day Trips	32%	43%	22%	34%
1 Night	22%	18%	11%	17%
2 Nights	24%	12%	22%	19%
3 Nights	11%	6%	11%	9%
4 Nights	0%	6%	6%	5%
5 or More Nights	10%	11%	24%	15%
Overnight Average # Nights/Stay	2.91	2.95	4.04	3.4

**Trip Characteristics Summary Table, continued**

	<b>Kent County</b>	<b>New Castle County</b>	<b>Sussex County</b>	<b>State of Delaware</b>
<b>Lodging Use</b>				
Hotel/Motel/B&B	61%	49%	17%	32%
Private home	26%	45%	69%	55%
Condo/time share	**	**	7%	5%
RV/tent	5%	**	3%	2%
Other	8%	6%	4%	7%
<b>Travel Party Size</b>				
Solo traveler	38%	54%	25%	40%
Average travel party size	1.9	1.7	2.6	2.1
<b>Expenditures</b>				
Average trip spending	\$366	\$226	\$474	\$335
<b>Top Trip Activities</b>				
Arts museums/galleries	**	**	1%	**
Beach activities	5%	1%	60%	27%
City/urban sightseeing	3%	4%	2%	3%
Cultural events/festivals	1%	2%	**	1%
Gambling	39%	4%	1%	8%
Golf	**	1%	5%	2%
Historic places/museums	2%	2%	4%	3%
National state park	4%	1%	9%	5%
Nightlife/dancing	3%	7%	4%	4%
Outdoor recreation	4%	1%	12%	7%
Performing arts	**	2%	3%	2%
Rural sightseeing	**	4%	3%	3%
Seminar/courses	2%	2%	**	1%
Shopping	17%	20%	44%	28%
Social/family event	9%	30%	125	17%
Sports event	8%	5%	**	3%
Theme/amusement park	**	**	6%	3%
Water sports/boating	3%	**	7%	4%
Winter sports	**	**	1%	1%

\*\* Less than 0.5%

## **DEMOGRAPHICS**

Lifestage, a demographic description of travelers to Kent County, is examined in this section.

### **Lifestage**

Nearly half (47%) of destination/overnight households visiting Kent County were in the Couples lifestage. Parents accounted for four in ten (40%) of visiting households. Twelve percent of destination/overnight households visiting Kent County were Singles, while relatively few households were in the Roommates lifestage. (See Appendix for lifestage definitions.)

#### **Lifestage of Kent County Visitors in 2004**

(percent of destination/overnight person-trips)

<u>Singles</u>	12%
Young Singles	**
Middle Singles	5%
Older Singles	8%
<u>Couples</u>	47%
Young Couple	20%
Working Older Couple	17%
Retired Older Couple	10%
<u>Parents</u>	40%
Young Parent	7%
Middle Parent	6%
Older Parent	27%
<u>Roommates</u>	**

\*\* *Less than 0.5%*

### Demographics Summary Table

	<b>Kent County</b>	<b>New Castle County</b>	<b>Sussex County</b>	<b>State of Delaware</b>
<b><u>Lifestage of Household</u></b>				
SINGLES	12%	29%	22%	23%
Young Singles	**	11%	9%	8%
Middle Singles	5%	9%	9%	8%
Older Singles	8%	8%	5%	7%
COUPLES	47%	44%	32%	40%
Young Couples	20%	19%	8%	14%
Older Working Couples	17%	16%	16%	16%
Older Retiring Couples	10%	9%	9%	10%
PARENTS	40%	25%	43%	36%
Young Parent	7%	5%	20%	13%
Middle Parent	6%	5%	9%	7%
Older Parent	27%	15%	14%	16%
ROOMMATES	**	2%	2%	1%

\*\* *Less than 0.5%*

# **APPENDICES**

## **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.

## **GLOSSARY OF TERMS**

- Activities** TravelScope gathers information on 20 different activity categories:
- (1) visiting historic places, sites, museums
  - (2) attending performing arts events (e.g. concerts, plays, etc.)
  - (3) attending cultural events or festivals
  - (4) visiting art museums or galleries
  - (5) outdoor activities (e.g. hunting, fishing, biking, etc.)
  - (6) shopping
  - (7) engaging in nightlife activities or dancing
  - (8) beach activities
  - (9) visiting national or state parks
  - (10) attending sports events
  - (11) gambling
  - (12) water sports or boating
  - (13) playing golf
  - (14) going to theme or amusement parks
  - (15) visiting zoos, aquariums, or science museums
  - (16) winter sports (e.g. skiing)
  - (17) rural sightseeing
  - (18) city/urban sightseeing
  - (19) taking seminars or courses
  - (20) attending a social or family event (e.g. wedding, funeral, etc.)
- Business Trip** Any trip where the primary purpose of the trip is given as “business,” “convention/seminar,” or “combined business/pleasure.”
- 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
- Household Trip** A trip taken by members of a household. 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 not include trips commuting to/from work or school or trips taken as a flight attendant or vehicle operator.
- Leisure Trip** Any trip where the primary purpose of the trip is given as “visit friends or relatives,” “outdoor recreation,” “entertainment,” or “personal.”

**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.

Young Singles:	1 Member Household Age of Head Under 35
Middle Singles:	1 Member Household Age of Head from 35 to 65
Older Singles:	1 Member Household Age of Head Over 65
Young Couple:	Multi-Member Household Age of Head Under 45 Married or Non-Related Individuals of Opposite Sex 18+ Present No Children Present
Working Older Couple:	Multi-Member Household Age of Head 45 and Over Head of Household Employed Married or Non-Related Individuals of Opposite Sex 18+ Present No Children Present
Retired Older Couple:	Multi-Member Household Age of Head 45 and Over Head of Household Not Employed No Children Present Married or Non-Related Individuals of Opposite Sex 18+ Present
Young Parent:	Multi-Member Household Age of Head Under 45 Youngest Child Under 6
Middle Parent:	Multi-Member Household Age of Head Under 45 Youngest Child 6+
Older Parent:	Multi-Member Household Age of Head 45+ Child at Home – Any Age
Roommates:	Unmarried Head of Household Living with Non-Relative 18+ of Same Sex

**Lodging** Information is gathered on five lodging categories: (1) hotel/motel/b&b; (2) private home; (3) condominium/time share; (4) recreational vehicle/tent; and (5) other.

**Person Trip** A person on a trip. These statistics are derived from household trips.