

2004 Visitor Profile Study

New Castle County



Delaware Economic Development Office
Industry Research Section
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2004 New Castle County Visitor Profile Study

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Pictured on the cover: C&D Canal Bridge

INTRODUCTION

The following visitor profile for New Castle 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 Kent 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 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 destination/overnight stays for New Castle 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 New Castle County in 2004 was 1.73 million, an increase of 41 percent over 1.23 million in 2003.

Eighty-six percent of total New Castle County person-trips were destination/overnight person-trips; fourteen percent were pass-throughs. Destination/overnight visitor volume to New Castle County was 1.48 million in 2004, an increase of 36 percent over 1.09 million in 2003.

Profile of Destination/Overnight Travel to New Castle County

- A total of 1.16 million leisure person-trips and 320,000 business person-trips were taken to New Castle County in 2004, 78 and 22 percent of total person-trip responses, respectively.
- New Jersey remained the top state of origin of New Castle County visitors in 2004.
- Personal auto travel remained the dominant form of transportation to New Castle County, accounting for 70 percent of person-trips to New Castle County in 2004.
- Most travel to New Castle County included one or more overnight stays (57%) in 2004; forty-three percent of New Castle County destination/overnight person-trips were day trips.
- The average number of nights for overnight person-trips in 2004 was 2.95, an increase from 2.49 in 2003.
- Nearly half (49%) of overnight person-trips to New Castle County included a stay in a hotel, motel, or B&B.
- The average destination/overnight travel party included 1.7 people from the household in 2004.
- Attending a family/social event remained the most popular activity for New Castle County visitors, with 30 percent of New Castle County destination/overnight person-trips including family/social events.
- Destination/overnight households visiting New Castle County spent an average of \$226 during their stay in the county.

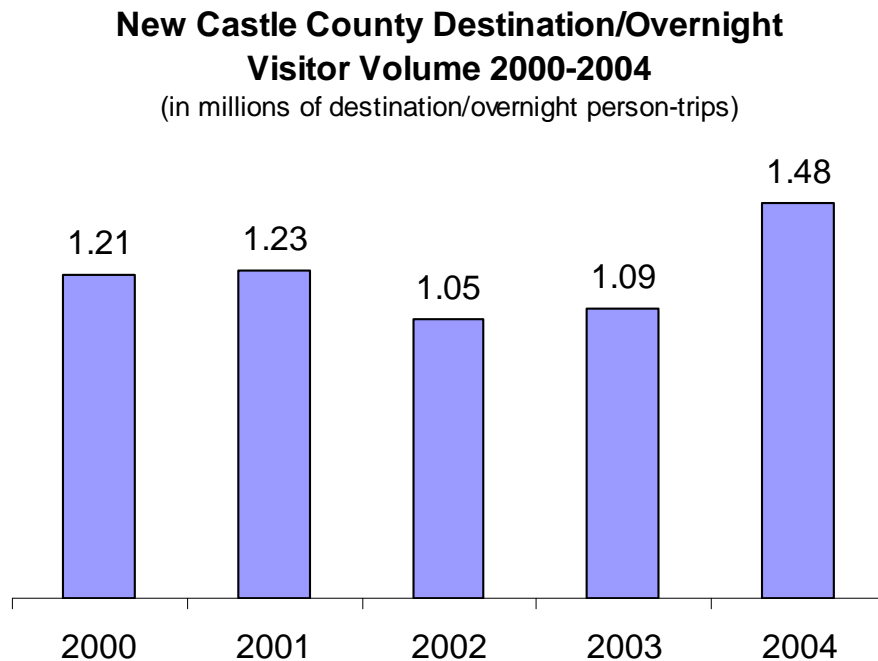
VISITOR VOLUME

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 New Castle County in 2004 was 1.73 million, an increase of 41 percent over 1.23 million in 2003.

Eighty-six percent of total New Castle County person-trips were destination/overnight person-trips; fourteen percent were pass-throughs. Destination/overnight visitors were either specifically visiting New Castle 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 New Castle County was 1.48 million in 2004, an increase of 36 percent over 1.09 million in 2003.



Quarterly Visitor Volume

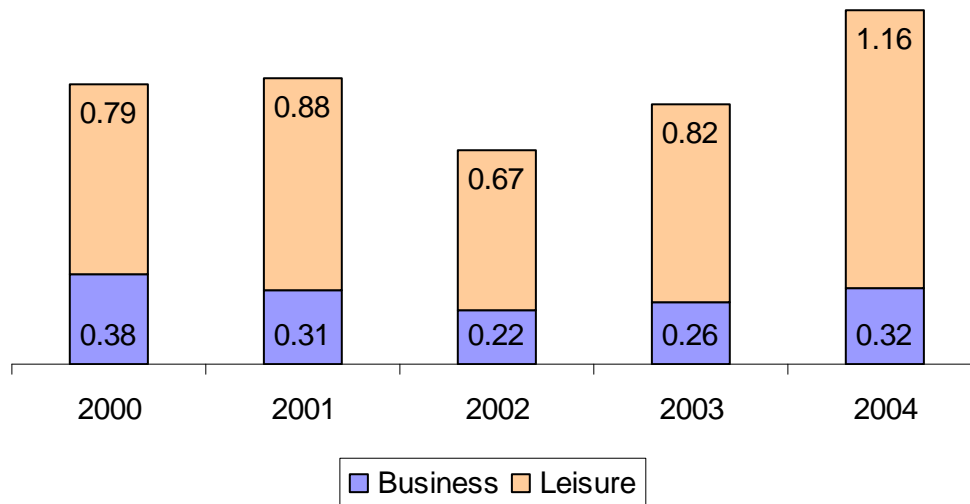
The fourth quarter, including the months of October, November, and December, was the most popular quarter for New Castle County travel. Thirty-six percent of trips occurred during this period in 2004, up from 28 percent in 2003.

| Timeframe | 2003 | 2004 | Change |
|---------------------------------|------|------|--------|
| Quarter 1 (Jan., Feb., Mar.) | 16% | 18% | +2% |
| Quarter 2 (Apr., May, Jun.) | 39% | 23% | -16% |
| Quarter 3 (Jul., Aug., Sep.) | 17% | 23% | +6% |
| Quarter 4 (Oct., Nov., Dec.) | 28% | 36% | +8% |
| Summer (Jun., Jul., Aug.) | 23% | 20% | -3% |

Business and Leisure Visitor Volume

A total of 1.16 million leisure person-trips and 320,000 business person-trips were taken to New Castle County in 2004, 78 and 22 percent of total person-trip responses, respectively. Leisure travel volume increased 41 percent from 2003 to 2004; business travel volume increased 23 percent.

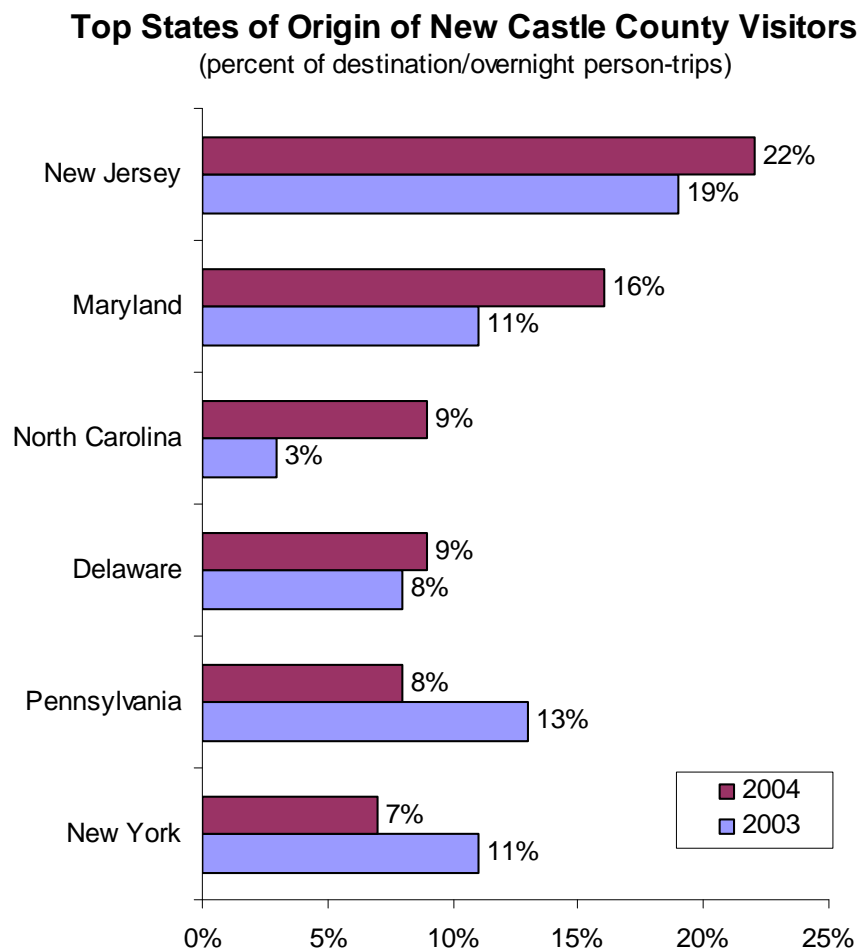
New Castle County Business/Leisure Visitor Volume Trends 2000-2004
(in millions of destination/overnight person-trips)



Top States of Origin

New Jersey remained the top state of origin of New Castle County visitors in 2004. The share of destination/overnight person-trips from New Jersey increased to 22 percent from 19 percent in 2003.

Other top states of origin of New Castle County destination/overnight visitors in 2004 included Maryland (16%), North Carolina (9%), Pennsylvania (8%), and New York (7%). These five states provided 62 percent of New Castle County destination/overnight person-trips. An additional nine percent of destination/overnight visitors to New Castle County were from Delaware.



Visitor Volume Summary Table

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

TRIP CHARACTERISTICS

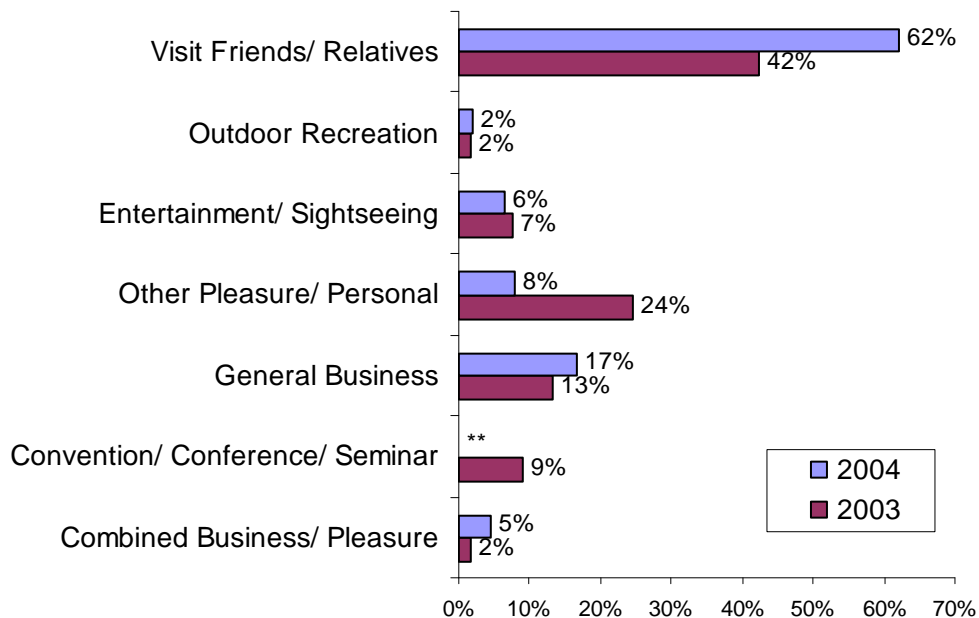
This section of the report contains detailed characteristics of destination/overnight trips. Characteristics include primary purpose of trip, primary mode of transportation, trip duration, lodging use, travel party size, trip activities, and trip expenditures.

Primary Purpose of Trip

Leisure travel purposes include visiting friends or relatives, outdoor recreation, entertainment/sightseeing, and other pleasure/personal reasons. Visiting friends and relatives remained the most frequent trip purpose for destination/overnight travelers to New Castle County; sixty-two percent of person-trips were for this purpose in 2004. Other personal/pleasure trip purposes accounted for eight percent of destination/overnight person-trips to New Castle County in 2004. Six percent of travel to the county was for entertainment and sightseeing purposes while outdoor recreation accounted for two percent.

Business travel purposes include general business, convention/conference/seminar attendance, and combined business/pleasure. The second most popular travel purpose overall for New Castle County destination/overnight travel in 2004 was general business comprising 17 percent of person-trips. Five percent of county travelers combined business and pleasure travel, and relatively few destination/overnight visitors traveled to New Castle County for conventions, conferences, or seminars.

Primary Purpose of Trip for New Castle County Visitors
(percent of destination/overnight person-trips)

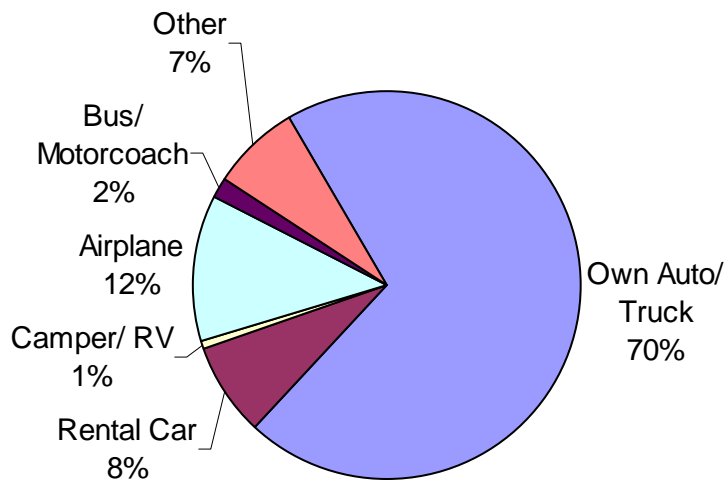


** Less than 0.5%

Primary Mode of Transportation

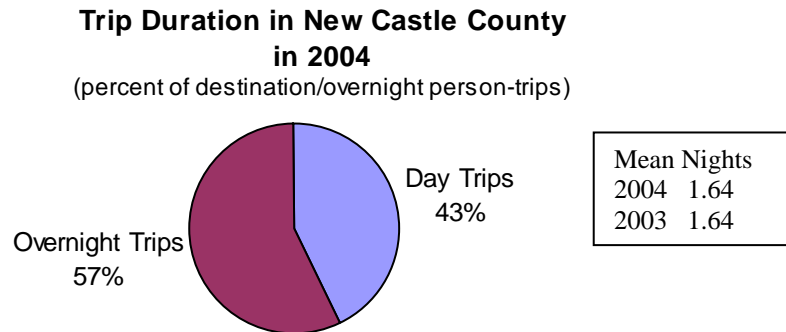
The dominant form of transportation to New Castle County remained personal auto travel, accounting for 70 percent of person-trips to New Castle County in 2004. Twelve percent of destination/overnight person-trips were made by airplane. Rental car use as a primary mode of transportation accounted for eight percent of person-trips. Fewer visitors traveled to New Castle County by bus or motorcoach (2%) and camper/RV (1%).

**Primary Mode of Transportation for
New Castle County Visitors in 2004**
(percent of destination/overnight visitors)

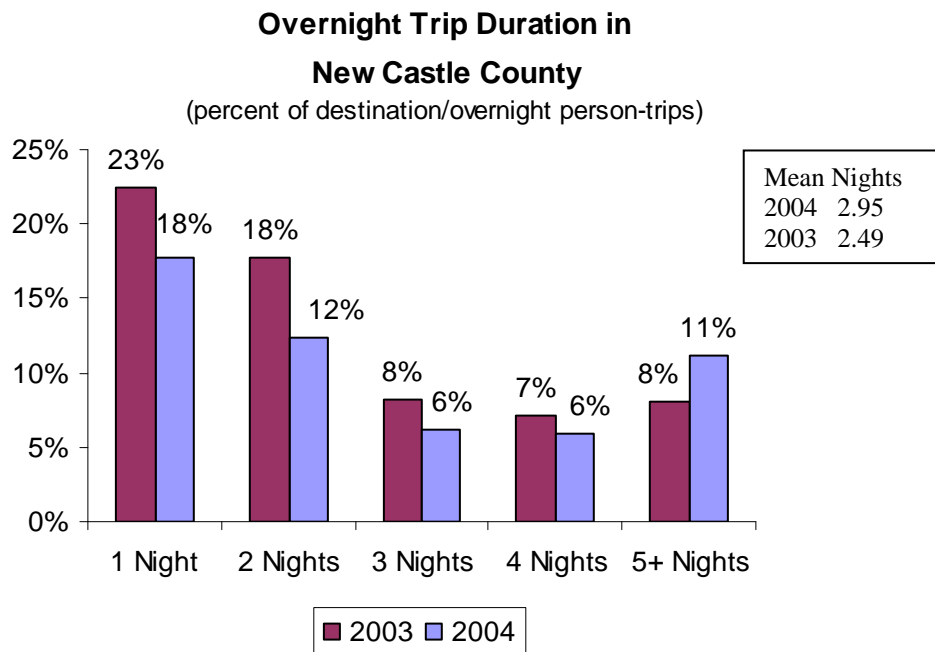


Trip Duration

Most travel to New Castle County included one or more overnight stays (57%) in 2004. Forty-three percent of New Castle County destination/overnight person-trips were day trips. The share of day trip travel to New Castle County in 2004 increased from 2003 (33%). The average stay in New Castle County in 2004 was the same as 2003: 1.64 nights.



Nearly one-fifth (17.8%) of overnight person-trips to New Castle County involved just one night in the county. Overnight stays of two and three nights accounted for 12 percent and six percent of overnight person-trips to New Castle County, respectively. Six percent of overnight trips involved stays of four nights. Just over one in ten (11%) overnight person-trips to New Castle County involved stays of five nights or longer, an increase from 8 percent in 2003. The average number of nights for overnight person-trips in 2004 was 2.95, an increase from 2.49 in 2003.

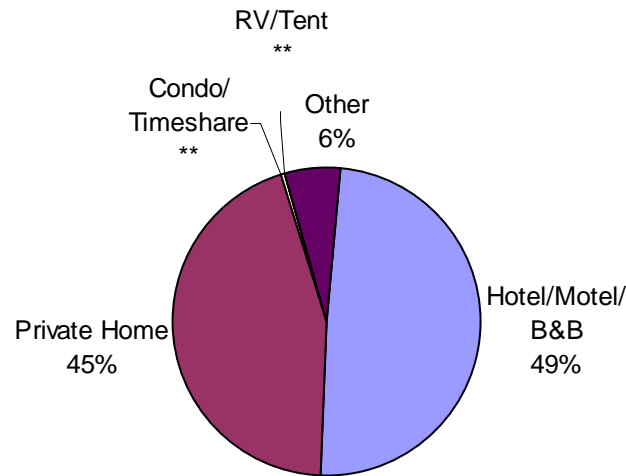


Lodging Use

Hotels, motels, and B&Bs remained the most popular type of lodging for overnight trips to New Castle County in 2004. Nearly half (49%) of overnight person-trips to New Castle County included a stay in a hotel, motel, or B&B, a decrease from 54 percent in 2003. Forty-five percent of overnight person-trips to New Castle County in 2004 included a stay in a private home.

Lodging Use* in New Castle County in 2004

(percent of overnight person-trips)



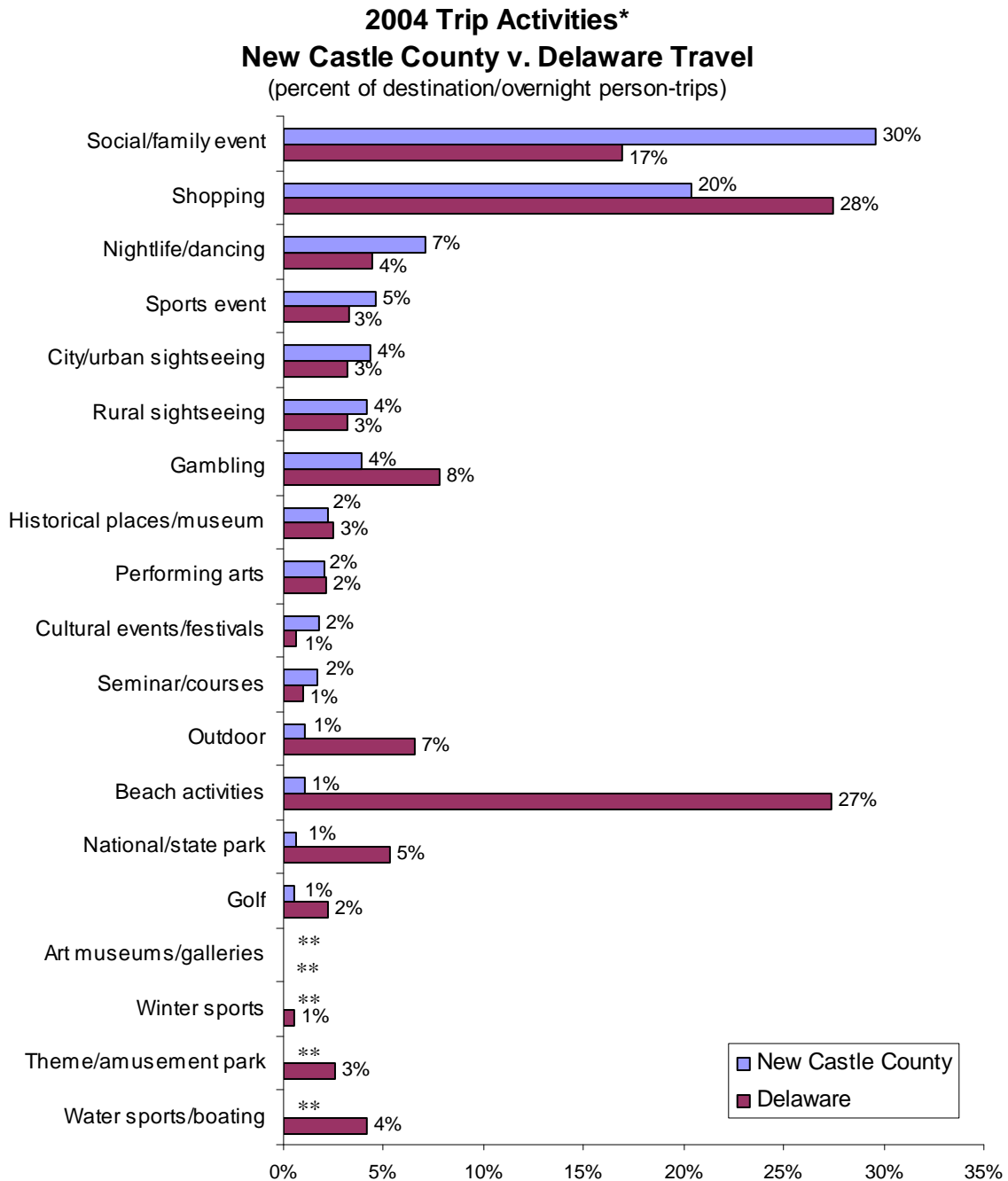
* Multiple responses allowed. ** Less than 0.5%

Travel Party Size

Fifty-four percent of destination/overnight visitors to New Castle County traveled alone in 2004. The average destination/overnight travel party included 1.7 people from the household in 2004.

Activities

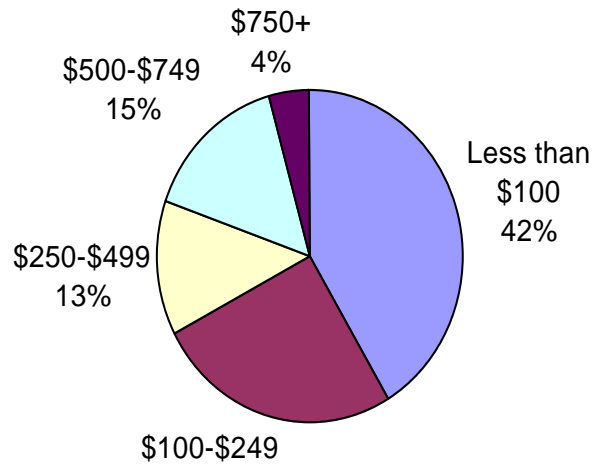
Attending a family/social event and shopping remained the most popular activities for New Castle County visitors, with 30 percent of New Castle County destination/overnight person-trips including family/social events and 20 percent including shopping. Other popular activities included nightlife/dancing (7%) and attending a sports event (5%).



Trip Expenditures

Average trip spending in New Castle County decreased in 2004. Households visiting New Castle County on destination/overnight trips spent an average of \$226 during their stay, 13 percent lower than 2003 (\$260). (This does not include transportation costs.)

Trip Expenditures in New Castle County in 2004
(percent of destination/overnight person-trips)



Trip Characteristics Summary Table

| | New Castle County | Kent County | Sussex County | State of Delaware |
|---------------------------------------|--------------------------|--------------------|----------------------|--------------------------|
| Primary Purpose of Trip | | | | |
| LEISURE | 78% | 81% | 94% | 88% |
| Visit friends/relatives | 62% | 27% | 31% | 41% |
| Outdoor recreation | 2% | 9% | 24% | 14% |
| Entertainment/sightseeing | 6% | 30% | 6% | 10% |
| Other personal/pleasure | 8% | 16% | 33% | 22% |
| BUSINESS | 22% | 19% | 6% | 12% |
| General business | 17% | 16% | 4% | 9% |
| Convention/conference/seminar | 0% | 1% | 0% | 1% |
| Combined business/pleasure | 5% | 2% | 2% | 2% |
| Primary Mode of Transportation | | | | |
| Own auto/truck | 70% | 85% | 88% | 82% |
| Rental car | 8% | 1% | 3% | 4% |
| Camper/RV | 1% | 4% | 0% | 1% |
| Airplane | 12% | 4% | 4% | 6% |
| Bus/motorcoach | 2% | 6% | 0% | 3% |
| Other | 7% | 1% | 4% | 4% |
| Trip Duration | | | | |
| No Nights | 43% | 32% | 22% | 34% |
| 1 Night | 18% | 22% | 11% | 17% |
| 2 Nights | 12% | 24% | 22% | 19% |
| 3 Nights | 6% | 11% | 11% | 9% |
| 4 Nights | 6% | 0% | 6% | 5% |
| 5 or More Nights | 11% | 10% | 24% | 15% |
| Overnight Average # Nights/Stay | 2.95 | 2.91 | 4.04 | 3.4 |

Trip Characteristics Summary Table, continued

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

Lifestage

Almost half (44%) of destination/overnight households visiting New Castle County were in the Couples lifestage. Singles accounted for three in ten (29%) of visiting households. A quarter (25%) of destination/overnight households visiting New Castle County were Parents, while two percent were in the Roommates lifestage. (See Appendix for lifestage definitions.)

Lifestage of New Castle County Visitors in 2004

(percent of destination/overnight person-trips)

| | |
|----------------------|-----|
| <u>Singles</u> | 29% |
| Young Singles | 11% |
| Middle Singles | 9% |
| Older Singles | 8% |
| | |
| <u>Couples</u> | 44% |
| Young Couple | 19% |
| Working Older Couple | 16% |
| Retired Older Couple | 9% |
| | |
| <u>Parents</u> | 25% |
| Young Parent | 5% |
| Middle Parent | 5% |
| Older Parent | 15% |
| | |
| <u>Roommates</u> | 2% |

Demographics Summary Table

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