

# *2004 Visitor Profile Study*

---

## *Sussex County*



Delaware Economic Development Office  
Industry Research Section  
May 2006

# **2004 Sussex County Visitor Profile Study**

|   |    |
|---|----|
| INTRODUCTION.....                         | 1  |
| EXECUTIVE SUMMARY.....                    | 2  |
| VISITOR VOLUME.....                       | 3  |
| Quarterly Visitor Volume.....             | 4  |
| Business and Leisure Visitor Volumes..... | 4  |
| Top States of Origin.....                 | 5  |
| Visitor Volume Summary Table.....         | 6  |
| TRIP CHARACTERISTICS.....                 | 7  |
| Primary Purpose of Trip.....              | 7  |
| Primary Mode of Transportation.....       | 8  |
| Trip Duration.....                        | 9  |
| Lodging Use.....                          | 10 |
| Travel Party Size.....                    | 10 |
| Trip Activities.....                      | 11 |
| Expenditures.....                         | 12 |
| Trip Characteristics Summary Table.....   | 13 |
| DEMOGRAPHICS.....                         | 15 |
| Lifestage.....                            | 15 |
| Demographics Summary Table.....           | 16 |
| APPENDICES.....                           | 17 |
| Methodology.....                          | 18 |
| Glossary of Terms.....                    | 19 |

*Pictured on the cover: A shore lighthouse in Sussex County*

## **INTRODUCTION**

The following visitor profile for Sussex 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 New Castle 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 Sussex County.

- This visitor profile includes aggregated totals for 24 city codes available in TravelScope which represent 24 communities in Sussex County.
- This visitor profile is based on total projected trips (including pass-through visitors) and destination/overnight stays for Sussex 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 Sussex County in 2004 was 2.92 million, an increase of 17 percent over 2.50 million in 2003.

Ninety-two percent of total Sussex County person-trips were destination/overnight person-trips; eight percent were pass-throughs. Destination/overnight visitor volume to Sussex County was 2.69 million in 2004, an increase of 14 percent over 2.36 million in 2003.

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

- A total of 2.53 million leisure person-trips and 153,000 business person-trips were taken to Sussex County in 2004, 94 and 6 percent of total person-trip responses, respectively.
- Maryland remained the top state of origin of Sussex County visitors in 2004.
- Personal auto travel remained the dominant form of transportation to Sussex County, accounting for 88 percent of person-trips to Sussex County in 2004.
- Nearly eighty percent of destination/overnight person-trips to Sussex County included one or more overnight stays in 2004; twenty-two percent were day trips.
- The average number of nights for overnight person-trips in 2004 was 4.04, a slight decrease from 4.11 in 2003.
- Seventy percent of overnight visits to Sussex County included a stay in a private home in 2004.
- The average travel party included 2.6 people from the household in 2004.
- Beach activities remained the most popular activities for Sussex County visitors in 2004, with 60 percent of Sussex County destination/overnight person-trips including beach activities.
- Destination/overnight households visiting Sussex County spent an average of \$474 during their stay in the county.

## **VISITOR VOLUME**

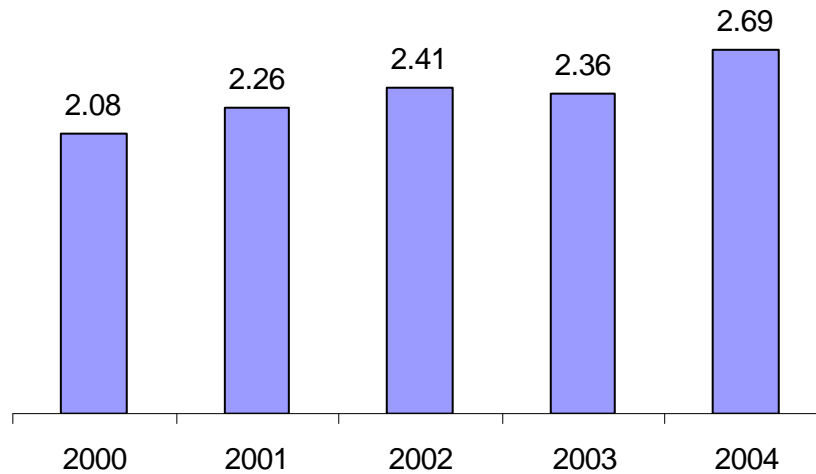
Visitor volumes – total person-trips and destination/overnight person-trips – are examined in this section of the profile.

The total number of person-trips to Sussex County in 2004 was 2.92 million, an increase of 17 percent over 2.50 million in 2003.

Ninety-two percent of total Sussex County person-trips were destination/overnight person-trips; eight percent were pass-throughs. Destination/overnight visitors were either specifically visiting Sussex 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 Sussex County was 2.69 million in 2004, an increase of 14 percent over 2.36 million in 2003.

**Sussex County Destination/Overnight  
Visitor Volume 2000-2004**  
(in millions of destination/overnight person-trips)



### Quarterly Visitor Volume

The third quarter, including the months of July, August, and September, was the most popular quarter for Sussex County travel. Fifty-four percent of trips occurred during this period in 2004, up from 46 percent in 2003.

| Timeframe                       | 2003 | 2004 | Change |
|---------------------------------|------|------|--------|
| Quarter 1<br>(Jan., Feb., Mar.) | 8%   | 6%   | -2%    |
| Quarter 2<br>(Apr., May, Jun.)  | 30%  | 24%  | -6%    |
| Quarter 3<br>(Jul., Aug., Sep.) | 46%  | 54%  | +8%    |
| Quarter 4<br>(Oct., Nov., Dec.) | 16%  | 16%  | --     |
| Summer<br>(Jun., Jul., Aug.)    | 53%  | 58%  | +5%    |

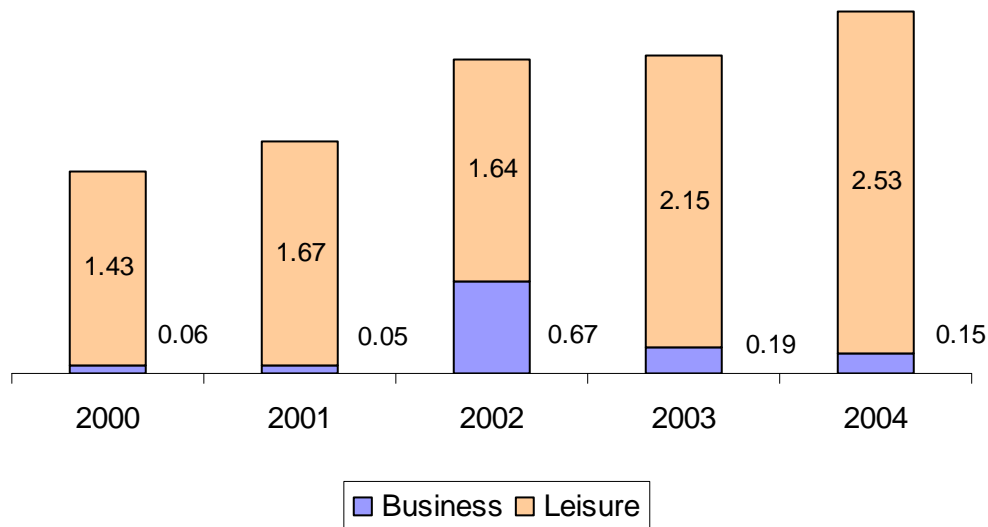
### Business and Leisure Visitor Volume

A total of 2.53 million leisure person-trips and 153,000 business person-trips were taken to Sussex County in 2004, 94 and 6 percent of total person-trip responses, respectively. Leisure travel volume increased 18 percent from 2003 to 2004; business travel volume decreased 21 percent.

#### Sussex County Business/Leisure

#### Visitor Volume Trends 2000-2004

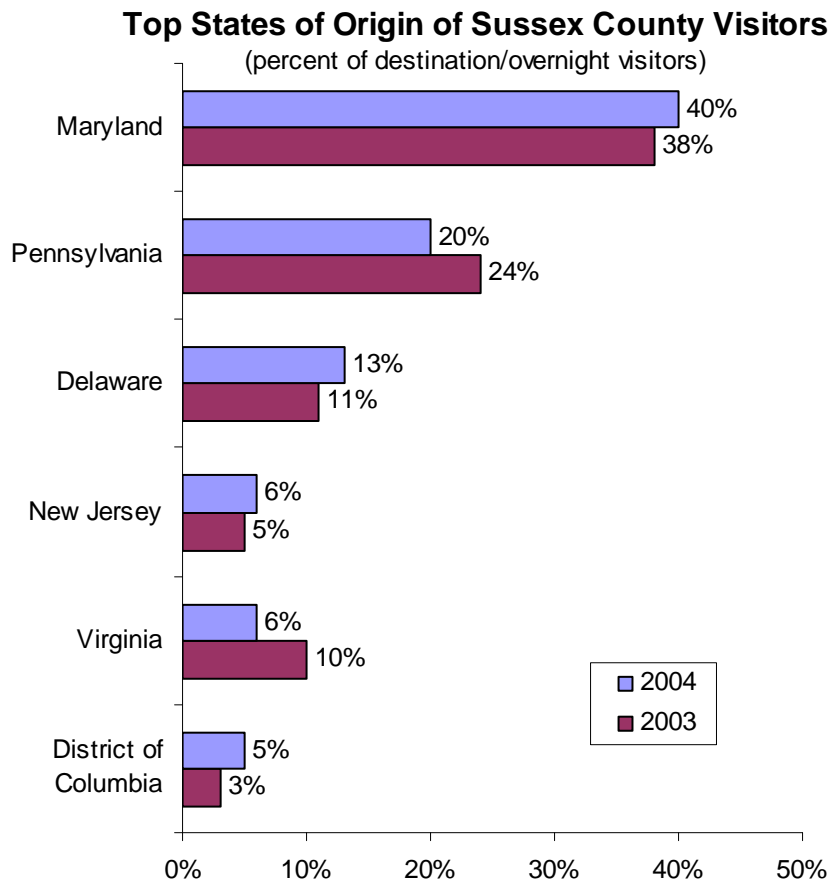
(in millions of destination/overnight person-trips)



## Top States of Origin

Maryland remained the top state of origin of Sussex County visitors in 2004. The share of destination/overnight person-trips from Maryland increased to 40 percent from 38 percent in 2003.

Other top states of origin of Sussex County destination/overnight visitors in 2004 included Pennsylvania (20%), New Jersey (6%), Virginia (6%), and the District of Columbia (5%). These five states provided 77 percent of Sussex County destination/overnight person-trips. An additional 13 percent of destination/overnight visitors to Sussex County were from Delaware.



### Visitor Volume Summary Table

|   | <b>Sussex County</b> | <b>Kent County</b> | <b>New Castle County</b> | <b>State of Delaware</b> |
|---|----------------------|--------------------|--------------------------|--------------------------|
| <b>Total Visitor Volume (including pass-throughs)</b> | 2.92 million         | 1.05 million       | 1.73 million             | 12.54 million            |
| <b>Total Destination/Overnight Visitor Volume</b>     |                      |                    |                          |                          |
| Total   | 2.69 million         | 0.92 million       | 1.48 million             | 6.56 million             |
| Quarter 1 (Jan., Feb., Mar.)                          | 6%                   | 10%                | 18%                      | 12%                      |
| Quarter 2 (Apr., May, Jun.)                           | 24%                  | 36%                | 23%                      | 26%                      |
| Quarter 3 (Jul., Aug., Sep.)                          | 54%                  | 24%                | 23%                      | 38%                      |
| Quarter 4 (Oct., Nov., Dec.)                          | 16%                  | 30%                | 36%                      | 24%                      |
| Summer (Jun., Jul., Aug.)                             | 58%                  | 26%                | 20%                      | 39%                      |
| <b>Business/Leisure Visitor Volume</b>                |                      |                    |                          |                          |
| Business (net)  | 0.15 million         | 0.17 million       | 0.32 million             | 0.79 million             |
| Leisure (net)   | 2.53 million         | 0.75 million       | 1.16 million             | 5.75 million             |
| <b>Top States of Origin</b>                           |                      |                    |                          |                          |
|   | 1. MD: 40%           | 1. MD: 32%         | 1. NJ: 22%               | 1. MD: 31%               |
|   | 2. PA: 20%           | 2. VA: 21%         | 2. MD: 16%               | 2. PA: 16%               |
|   | 3. NJ: 6%            | 3. PA: 14%         | 3. NC: 9%                | 3. NJ: 12%               |
|   | 4. VA: 6%            | 4. NJ: 13%         | 4. PA: 8%                | 4. VA: 9%                |
|   | 5. DC: 5%            | 5. NC: 3%          | 5. NY: 7%                | 5. DC: 3%                |
|   | DE: 13%              | DE: 10%            | DE: 9%                   | 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.

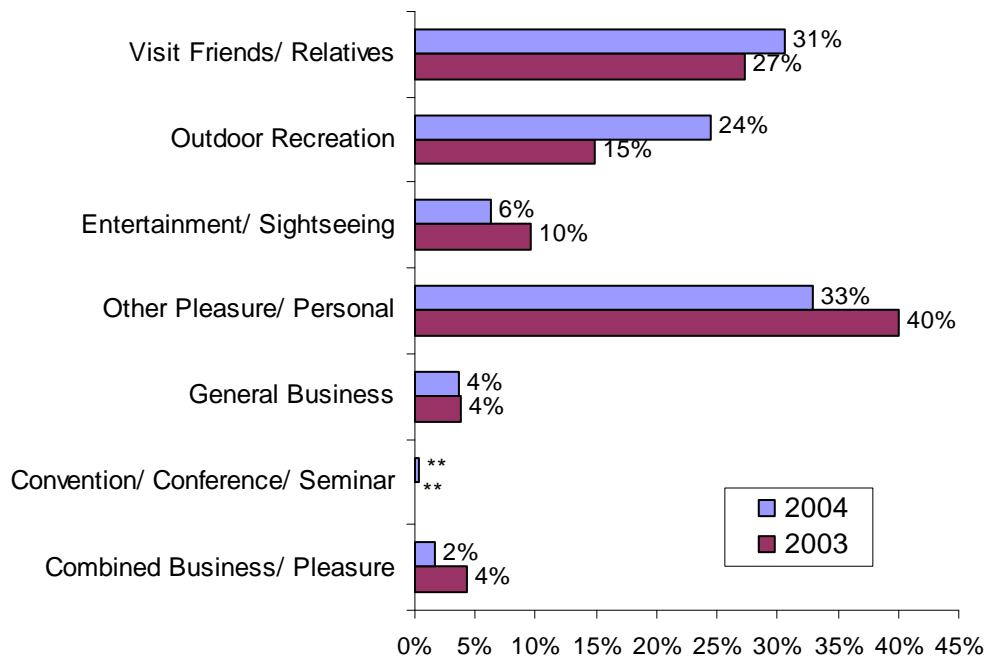
### **Primary Purpose of Trip**

Leisure travel purposes include visiting friends or relatives, outdoor recreation, entertainment/sightseeing, and other pleasure/personal reasons. Other pleasure/personal remained the most frequent trip purpose for destination/overnight travelers to Sussex County; thirty-three percent of person-trips were for this purpose in 2004. Visiting friends and relatives was the second most popular trip purpose and accounted for 31 percent of destination/overnight person-trips to Sussex County in 2004. Twenty-four percent of travel to the county was for outdoor recreation, and six percent for entertainment and sightseeing purposes.

Business travel purposes include general business, convention/conference/seminar attendance, and combined business/pleasure. General business purposes accounted for four percent of destination/overnight travel to Sussex County in 2004. Two percent of county travelers combined business and pleasure travel, and relatively few destination/overnight visitors traveled to Sussex County for conventions, conferences, or seminars.

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

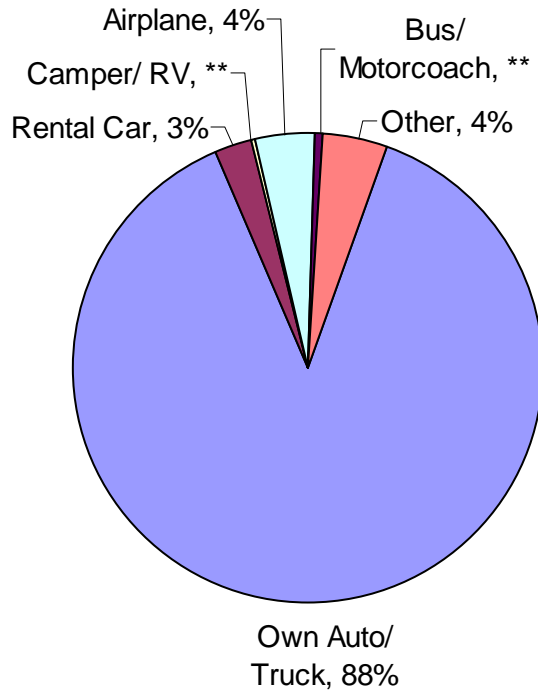
(percent of destination/overnight person-trips)



## Primary Mode of Transportation

The dominant form of transportation to Sussex County remained personal auto travel, accounting for 88 percent of person-trips to Sussex County in 2004. Four percent of destination/overnight person-trips were made by airplane. Rental car use as a primary mode of transportation accounted for three percent of person-trips. Relatively few visitors traveled to Sussex County by bus/motorcoach or camper/RV.

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

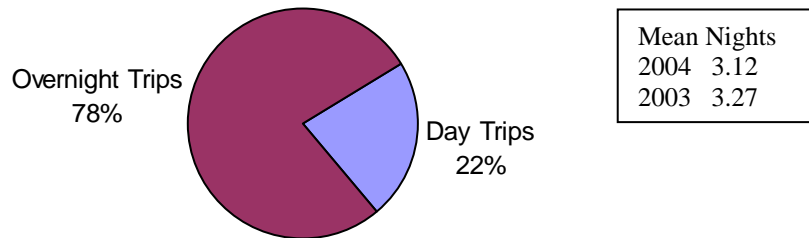


## Trip Duration

Nearly eight in ten (78%) of destination/overnight person-trips to Sussex County included one or more overnight stays in 2004; twenty-two percent were day trips. The share of day trip travel to Sussex County increased only slightly from 20 percent in 2003. The average stay in Sussex County in 2004 was 3.12 days, a decrease from 3.27 in 2003.

### Trip Duration in Sussex County in 2004

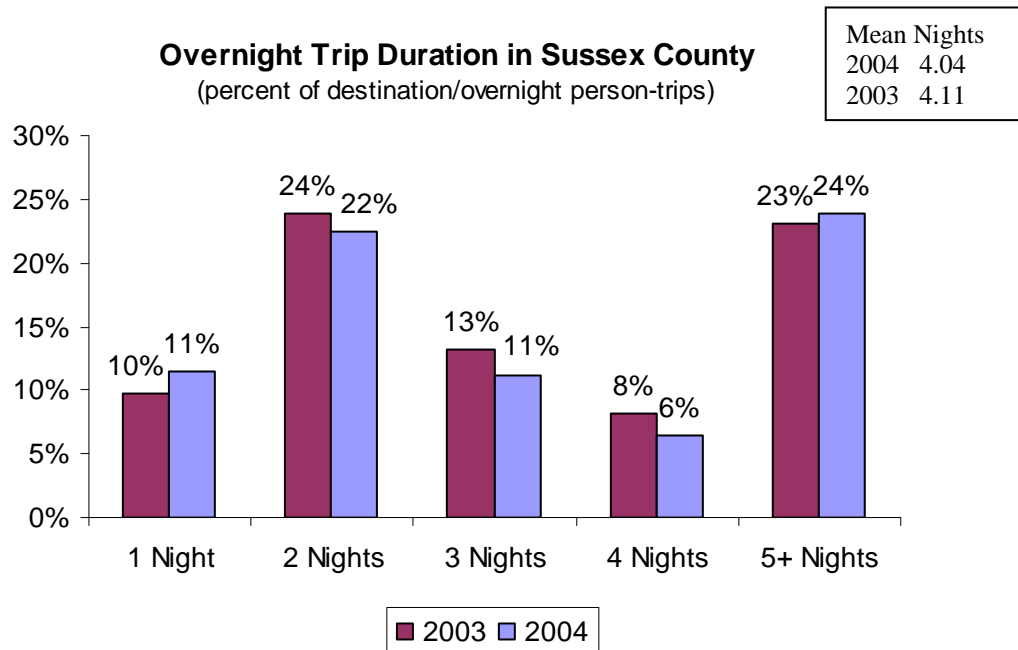
(percent of destination/overnight person-trips)



One in ten (11%) of overnight person-trips to Sussex County involved just one night in the county. Overnight stays of two and three nights accounted for 22 percent and 11 percent, respectively. Six percent of overnight trips involved stays of four nights. Nearly one quarter of overnight person-trips to Sussex County involved stays of five nights or longer, a slight increase from 23 percent in 2003. The average number of nights for overnight person-trips in 2004 was 4.04, a slight decrease from 4.11 in 2003.

### Overnight Trip Duration in Sussex County

(percent of destination/overnight person-trips)

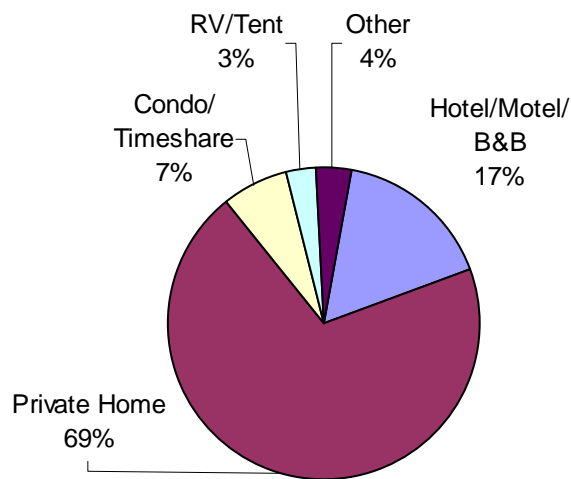


## Lodging Use

Private homes remained the most popular type of lodging for overnight trips to Sussex County in 2004. Seven in ten (69%) of overnight person-trips to Sussex County included a stay in a private home, an increase from 58 percent in 2003. Seventeen percent of overnight person-trips to Sussex County included a stay in a hotel, motel, or B&B. Condos or timeshares were used by seven percent of overnight visitors, while RVs or tents were used by three percent. Four percent used some other type of lodging.

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

(percent of overnight person-trips)



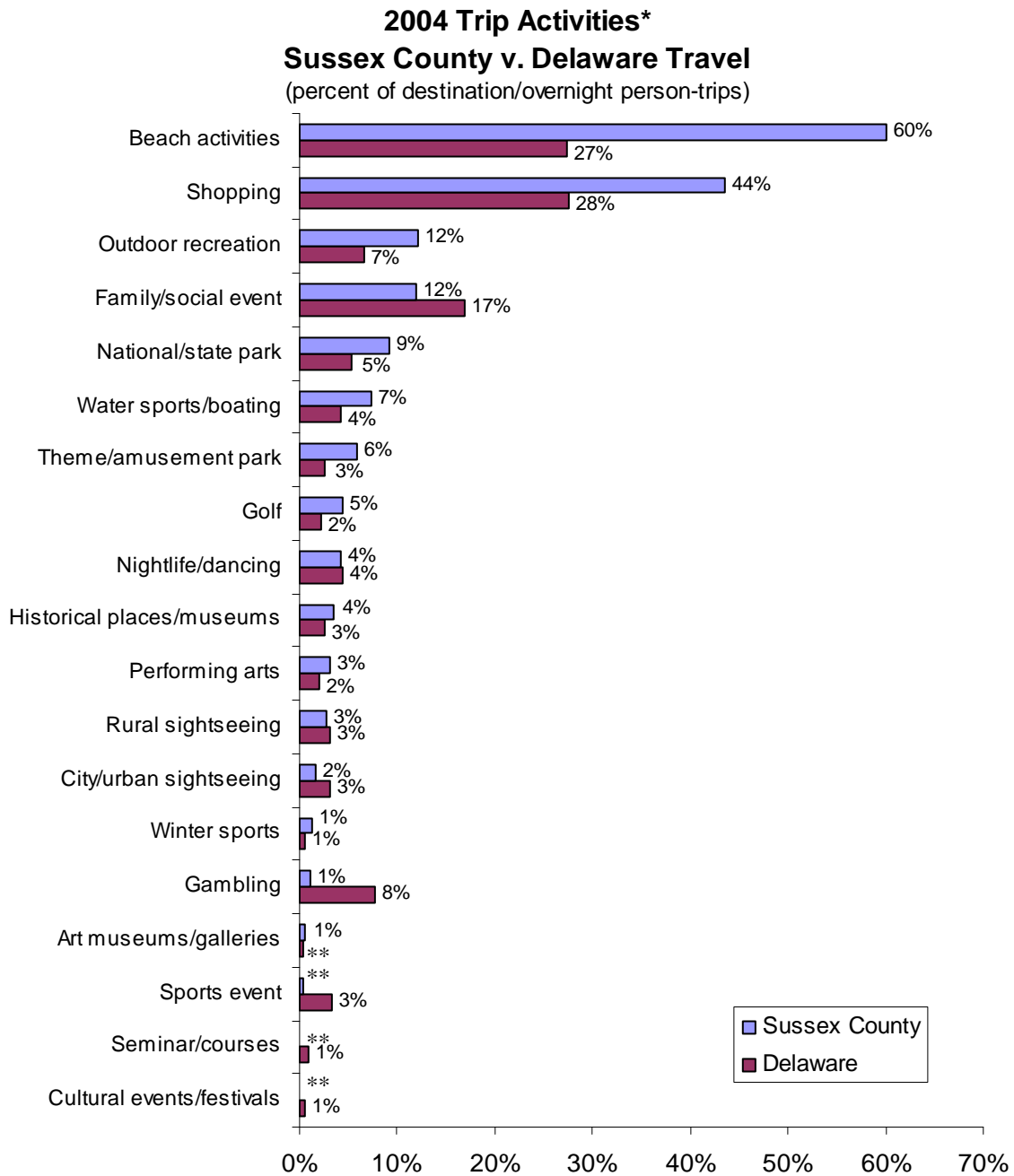
\* Multiple responses allowed.

## Travel Party Size

Twenty-five percent of destination/overnight visitors to Sussex County traveled alone in 2004. The average destination/overnight travel party included 2.6 people from the household in 2004.

## Activities

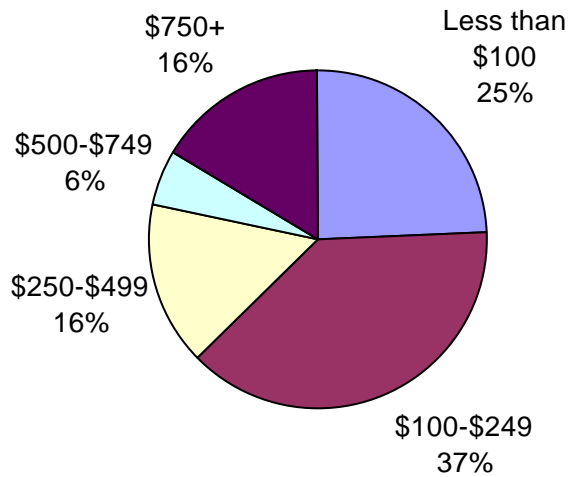
Beach activities and shopping remained the most popular activities for Sussex County visitors in 2004, with 60 percent of Sussex County destination/overnight person-trips including beach activities and 44 percent including shopping. Other popular activities included outdoor recreation (12%) and attending a family/social event (12%).



## Trip Expenditures

Average trip spending in Sussex County increased in 2004. Households visiting Sussex County on destination/overnight trips spent an average of \$474 during their stay, 54 percent higher than 2003 (\$308). (This does not include transportation costs).

**Trip Expenditures in Sussex County in 2004**  
(percent of destination/overnight person-trips)



**Trip Characteristics Summary Table**

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

**Trip Characteristics Summary Table, continued**

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

*\*\*Less than 0.5%*

## **DEMOGRAPHICS**

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

### **Lifestage**

Forty-three percent of destination/overnight households visiting Sussex County were in the Parents lifestage. Couples accounted for three in ten (32%) of visiting households. Twenty-two percent of destination/overnight households visiting Sussex County were Singles, while two percent were in the Roommates lifestage. (See Appendix for lifestage definitions.)

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

(percent of destination/overnight person-trips)

|                      |     |
|----------------------|-----|
| <u>Singles</u>       | 22% |
| Young Singles        | 9%  |
| Middle Singles       | 9%  |
| Older Singles        | 5%  |
| <br>                 |     |
| <u>Couples</u>       | 32% |
| Young Couple         | 8%  |
| Working Older Couple | 16% |
| Retired Older Couple | 9%  |
| <br>                 |     |
| <u>Parents</u>       | 43% |
| Young Parent         | 20% |
| Middle Parent        | 9%  |
| Older Parent         | 14% |
| <br>                 |     |
| <u>Roommates</u>     | 2%  |

### Demographics Summary Table

|                               | <b>Sussex<br/>County</b> | <b>Kent<br/>County</b> | <b>New Castle<br/>County</b> | <b>State of<br/>Delaware</b> |
|-------------------------------|--------------------------|------------------------|------------------------------|------------------------------|
| <b>Lifestage of Household</b> |                          |                        |                              |                              |
| SINGLES                       | 22%                      | 12%                    | 29%                          | 23%                          |
| Young Singles                 | 9%                       | **                     | 11%                          | 8%                           |
| Middle Singles                | 9%                       | 5%                     | 9%                           | 8%                           |
| Older Singles                 | 5%                       | 8%                     | 8%                           | 7%                           |
| COUPLES                       | 32%                      | 47%                    | 44%                          | 40%                          |
| Young Couples                 | 8%                       | 20%                    | 19%                          | 14%                          |
| Older Working Couples         | 16%                      | 17%                    | 16%                          | 16%                          |
| Older Retiring Couples        | 9%                       | 10%                    | 9%                           | 10%                          |
| PARENTS                       | 43%                      | 40%                    | 25%                          | 36%                          |
| Young Parent                  | 20%                      | 7%                     | 5%                           | 13%                          |
| Middle Parent                 | 9%                       | 6%                     | 5%                           | 7%                           |
| Older Parent                  | 14%                      | 27%                    | 15%                          | 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<br>Age of Head Under 35  |
| Middle Singles:       | 1 Member Household<br>Age of Head from 35 to 65   |
| Older Singles:        | 1 Member Household<br>Age of Head Over 65   |
| Young Couple:         | Multi-Member Household<br>Age of Head Under 45<br>Married or Non-Related Individuals of Opposite<br>Sex 18+ Present<br>No Children Present                                      |
| Working Older Couple: | Multi-Member Household<br>Age of Head 45 and Over<br>Head of Household Employed<br>Married or Non-Related Individuals of Opposite<br>Sex 18+ Present<br>No Children Present     |
| Retired Older Couple: | Multi-Member Household<br>Age of Head 45 and Over<br>Head of Household Not Employed<br>No Children Present<br>Married or Non-Related Individuals of Opposite<br>Sex 18+ Present |
| Young Parent:         | Multi-Member Household<br>Age of Head Under 45<br>Youngest Child Under 6  |
| Middle Parent:        | Multi-Member Household<br>Age of Head Under 45<br>Youngest Child 6+   |
| Older Parent:         | Multi-Member Household<br>Age of Head 45+<br>Child at Home – Any Age  |
| Roommates:            | Unmarried Head of Household<br>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.