

WILD, WONDERFUL

**WEST
VIRGINIA**



Longwoods
INTERNATIONAL



Longwoods
Travel USA®

West Virginia

2015 Overnight Visitor Study

Table of Contents



Introduction	3
Research Objectives	4
Methodology	5
Key Findings	6
Size & Structure of the U.S. Travel Market	10
Size & Structure of West Virginia Domestic Overnight Travel Market	14
Overnight Trip Detail	18
Overnight Expenditures.....	19
Overnight Trip Characteristics.....	25
Demographic Profile of Overnight Visitors	60
Appendix: Key Terms Defined	71

Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides an overview for West Virginia's **domestic** tourism business in 2015.

Research Objectives



- The visitor research program is designed to provide:
 - *Estimates of domestic overnight visitor volumes to West Virginia*
 - *A profile of West Virginia's performance within its overnight travel market*
 - *Domestic visitor expenditures in West Virginia, in co-operation*
 - *Relevant trends in each of these areas*

Methodology



- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Travel USA®** survey:
 - *Selected to be representative of the U.S. adult population*
- For the 2015 travel year, this yielded :
 - 237,555 overnight trips nationally:
- For West Virginia the following sample was achieved in 2015:
 - 1,510 overnight trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Key Terms Defined



- ◉ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ◉ A **Person-Trip** is one trip taken by one visitor.
 - ◉ *Person-trips are the key unit of measure for this report.*



Key Findings

Key Findings



- ◉ In 2015, West Virginia had 15.9 million overnight person trips, increasing 4% from 2013, and 6% from 2014.
- ◉ “Visiting friends and relatives” (at 47%) was the most frequent purpose for an overnight trip to West Virginia. Marketable trips (those influenced by marketing efforts) were 41% of the total overnight trips. “Outdoors” was the highest marketable trip purpose.
- ◉ For overnight trips, the top state markets were West Virginia, Ohio, and Virginia. Among DMAs, the top three visitor sources were Washington D.C., Charleston, and Pittsburgh.

Key Findings



- Of the overnight respondents, 86% have visited at least once. Seventy-eight (78%) percent had visited in the past year.
- Similar to the national average, over half (53%) of the overnight trips were planned 2 months or less before the trip.
- “Advice from relatives or friends,” “hotel or resort,” and “destination websites” were the most common information planning sources for an overnight trip. “Hotel or resort” was the most common booking source.

Key Findings – (Cont'd)



- ◉ The average number of nights spent in West Virginia for an overnight trip was 2.7 nights, up from 2.6 nights in 2013. The average travel party size was 3.1 persons.
- ◉ The top five overnight trip activities and experiences were “Shopping,” “Landmark/historic site,” “National/state park,” “Fine dining,” and “Swimming.”
- ◉ The highest social media activities on an overnight trip to West Virginia were “posting photos online,” “reading travel reviews,” and “looking at photos online.”

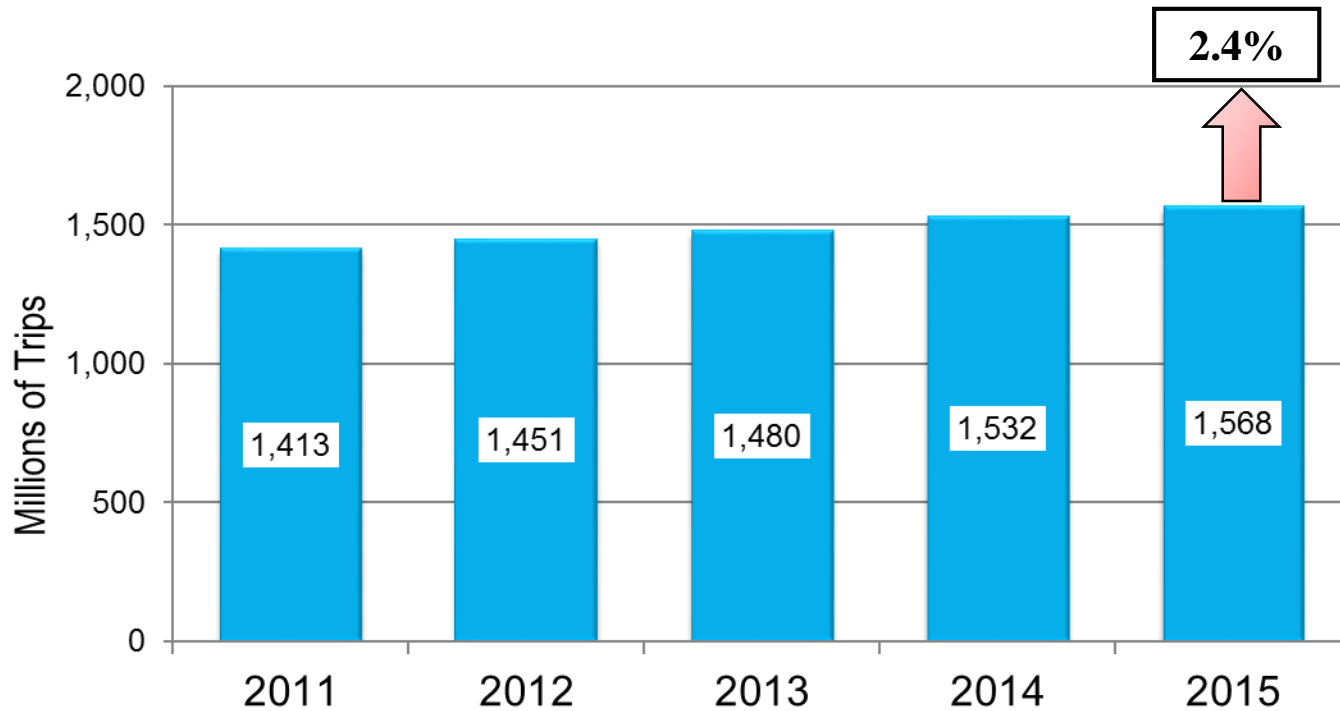


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



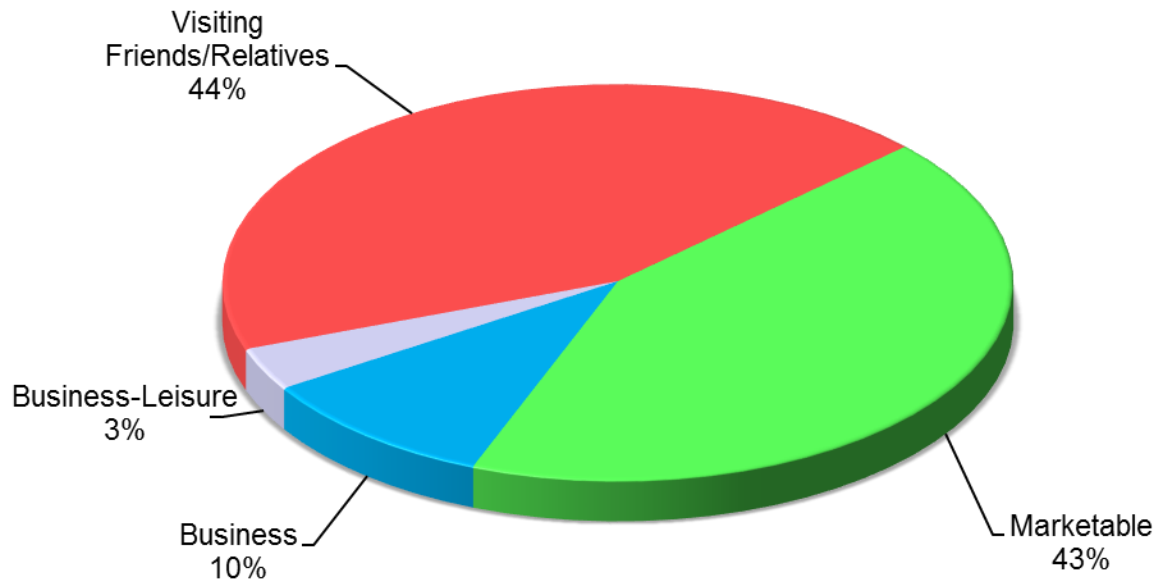
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2015 Overnight Trips



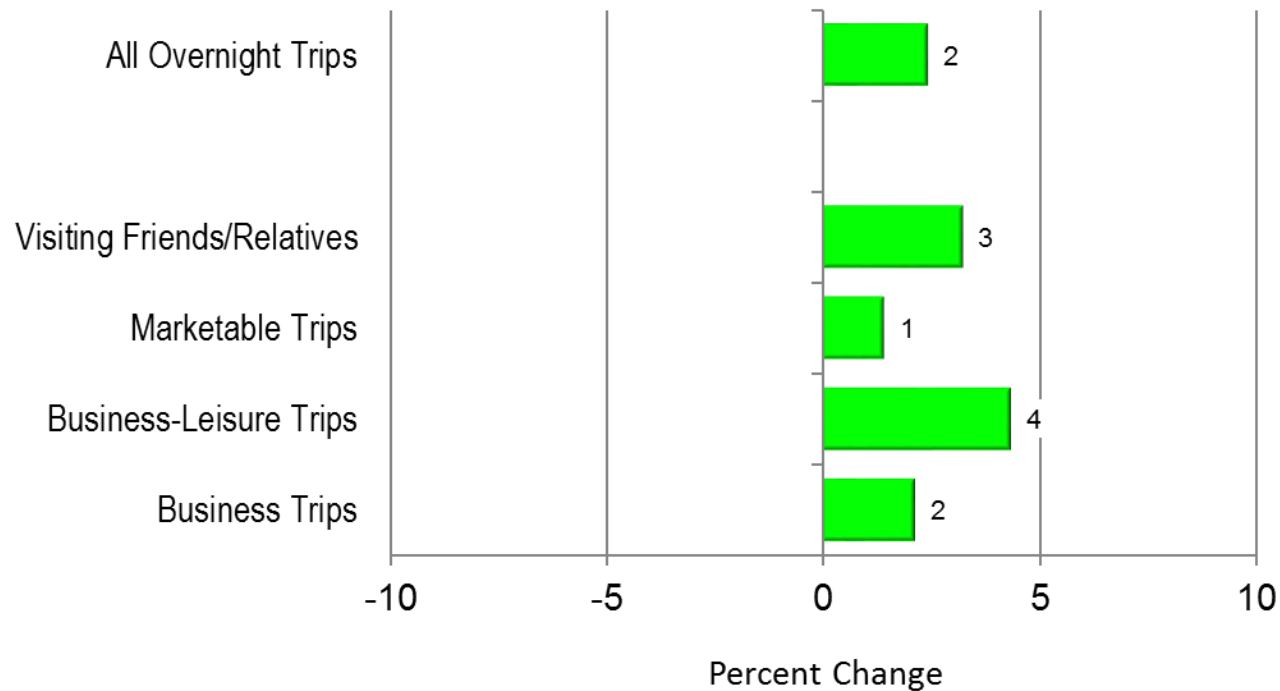
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2015 vs. 2014



Base: Total Overnight Person-Trips



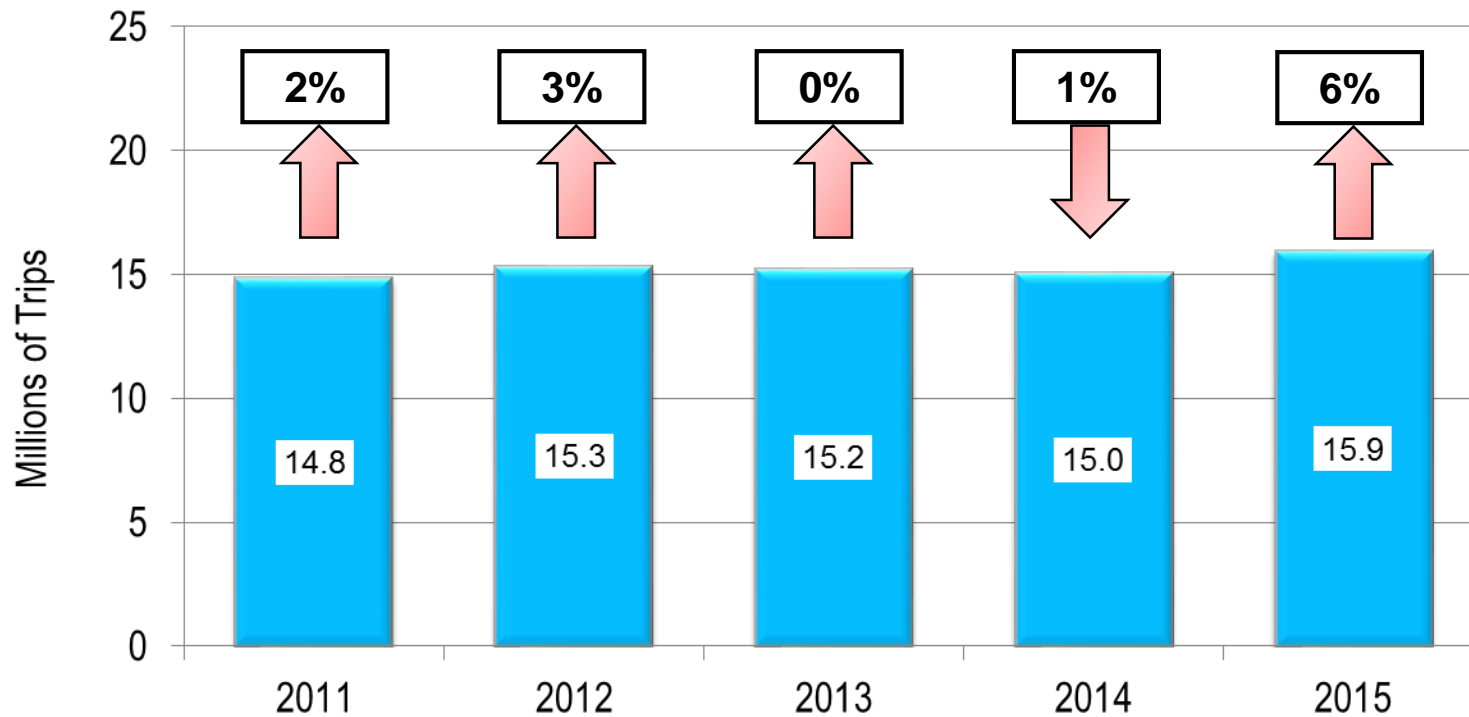


Size & Structure of West Virginia Domestic Overnight Travel Market

Overnight Trips to West Virginia



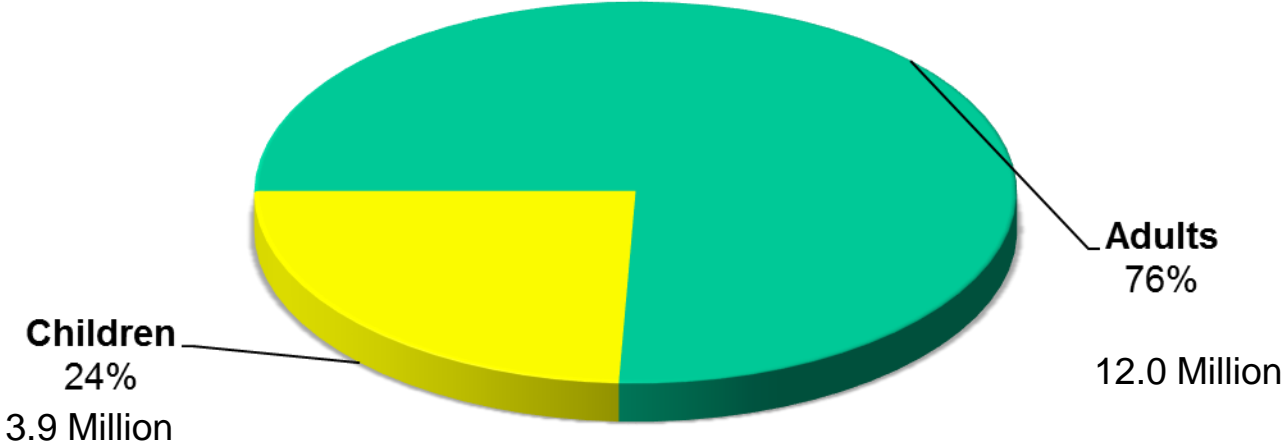
Base: Total Overnight Person-Trips to West Virginia



Size of West Virginia Overnight Travel Market — Adults vs. Children



Total Overnight Person-Trips = 15.9 Million

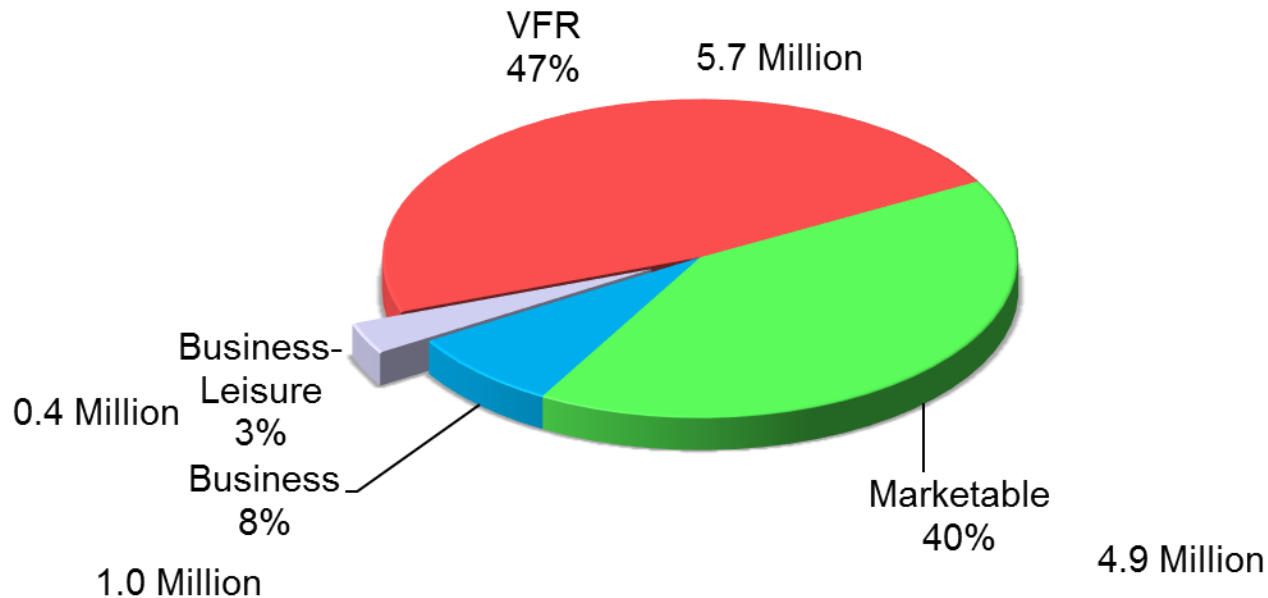


West Virginia Overnight Travel Market

by Main Trip Purpose



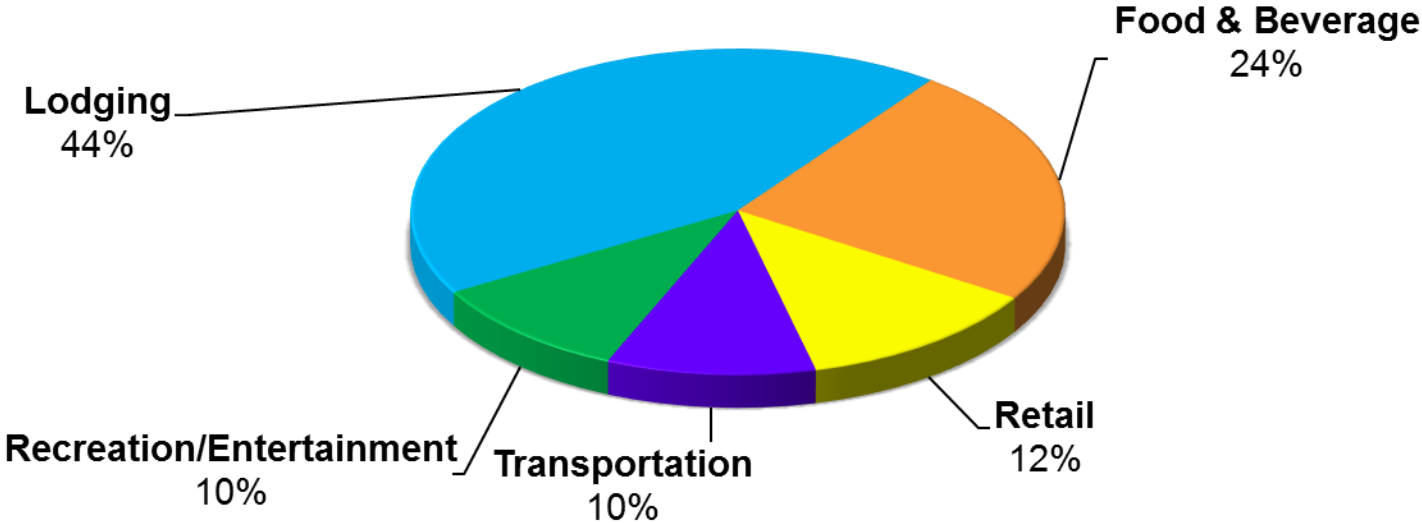
Adult Overnight Person-Trips = 12.0 Million





Overnight Trip Expenditures

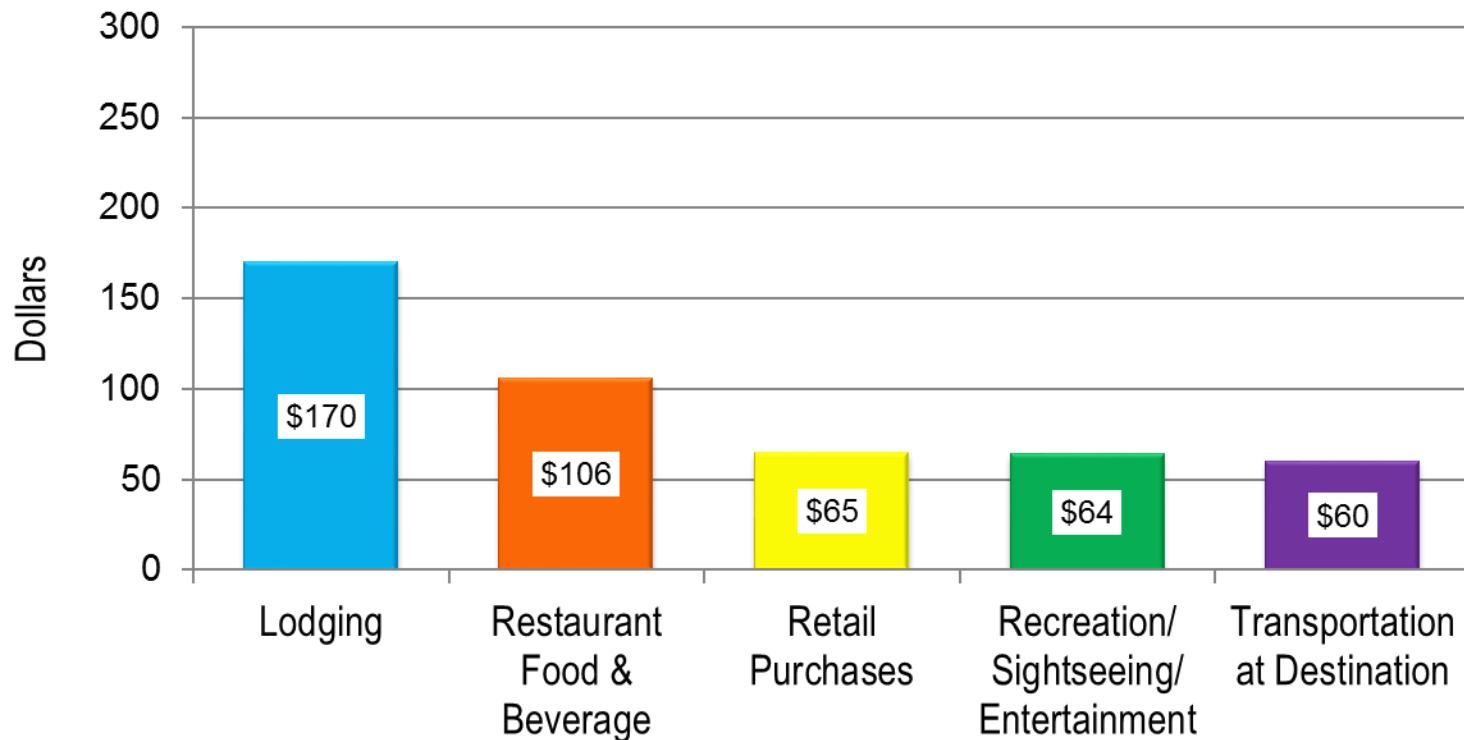
Total Domestic West Virginia Overnight Spending — by Sector



Average Per Party Expenditures on Domestic Overnight Trips — By Sector



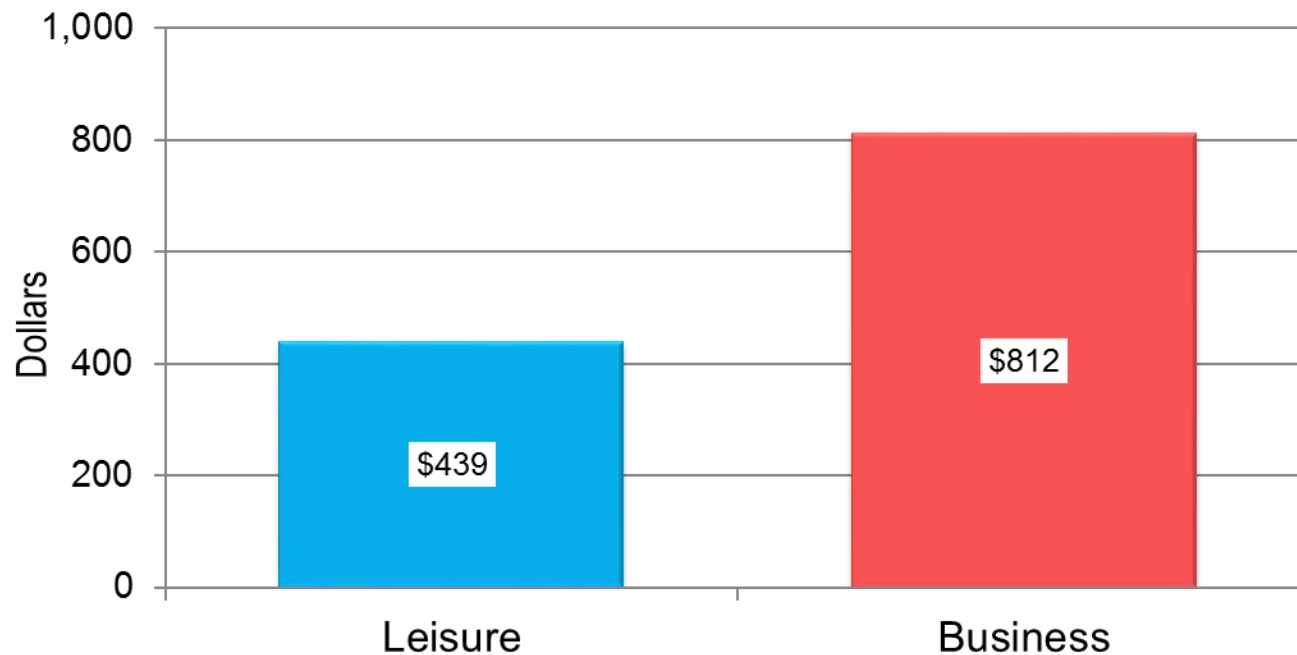
Base: Total Overnight Person-Trips to West Virginia



Average Per Party Expenditures on Domestic Overnight Trips — by Trip Purpose



Base: Total Overnight Person-Trips to West Virginia



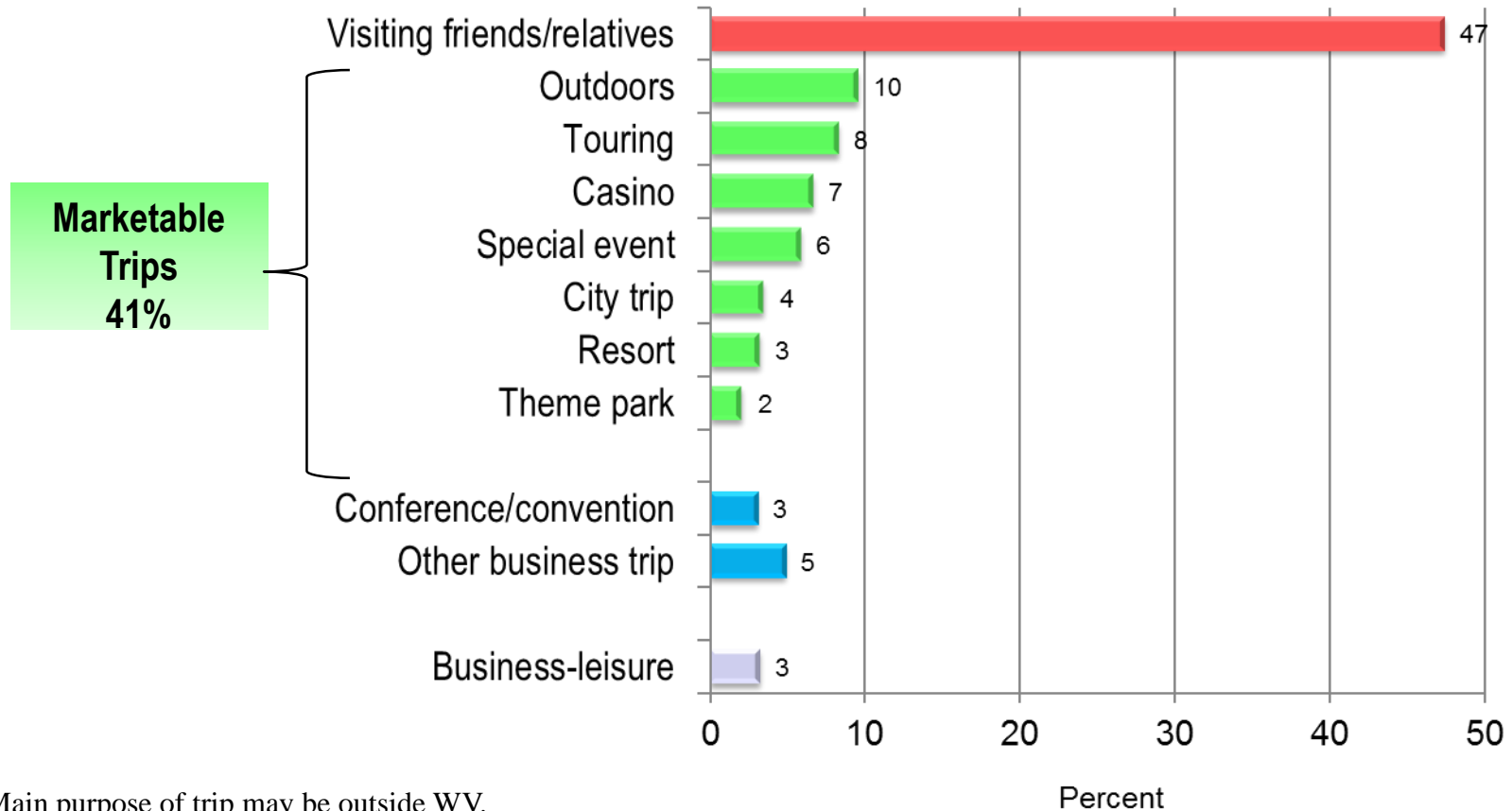


Overnight Trip Characteristics

Main Purpose of Trip



Base: Total Overnight Person-Trips to West Virginia

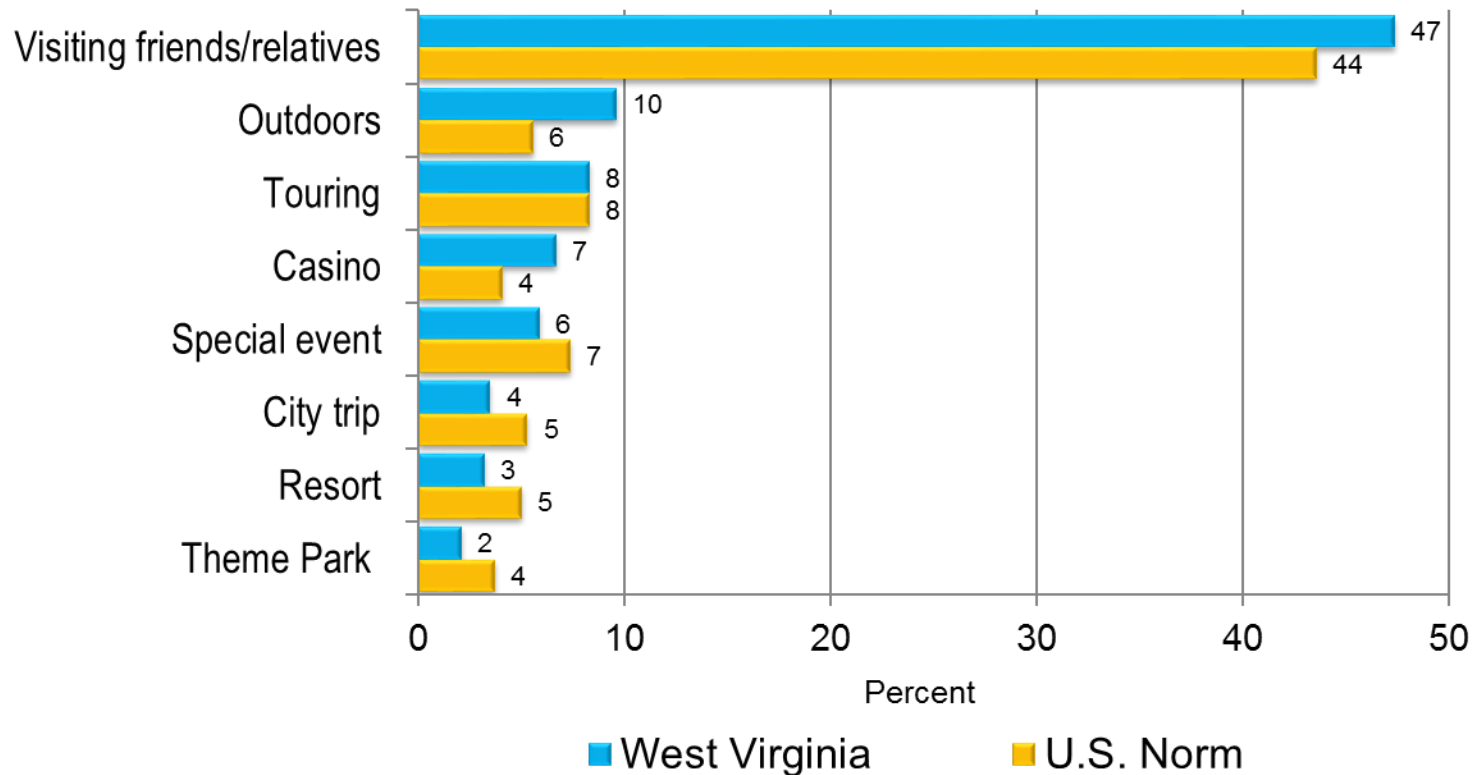


*Main purpose of trip may be outside WV.

Main Purpose of Leisure Trip — West Virginia vs. National Norm



Base: Total Overnight Person-Trips

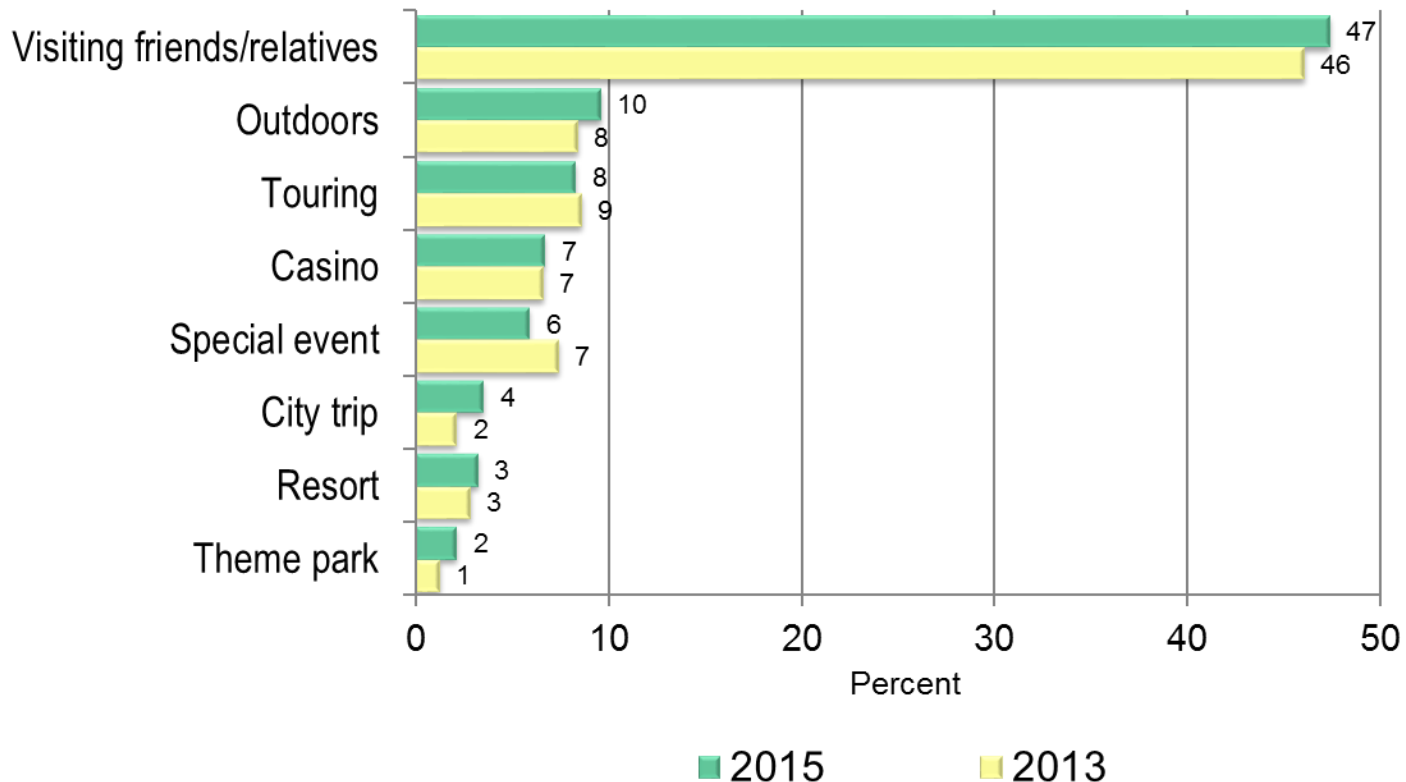


*Main purpose of trip may be outside WV.

Main Purpose of Overnight Leisure Trip to West Virginia — 2015 vs. 2013



Base: Total Overnight Person-Trips to West Virginia

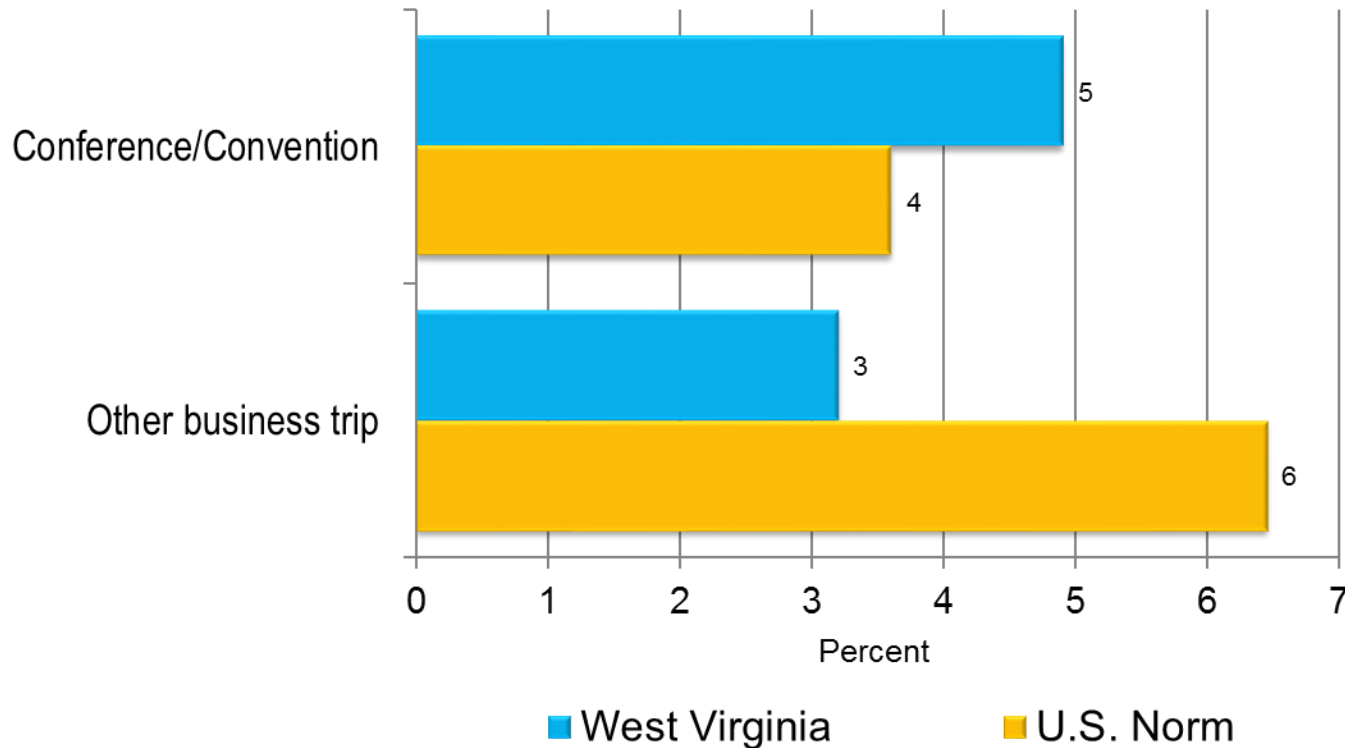


*Main purpose of trip may be outside WV.

Main Purpose of Business Trip — West Virginia vs. National Norm



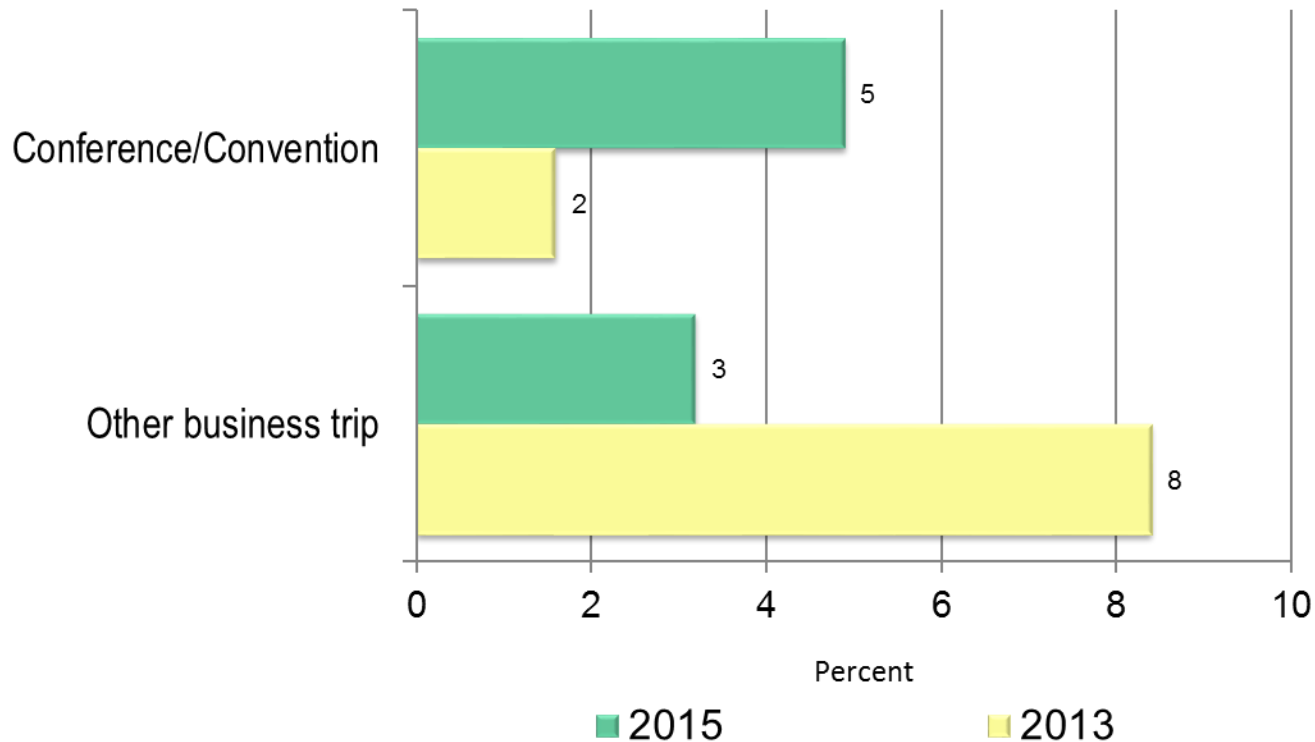
Base: Total Overnight Person-Trips



Main Purpose of Overnight Business Trip to West Virginia — 2015 vs. 2013



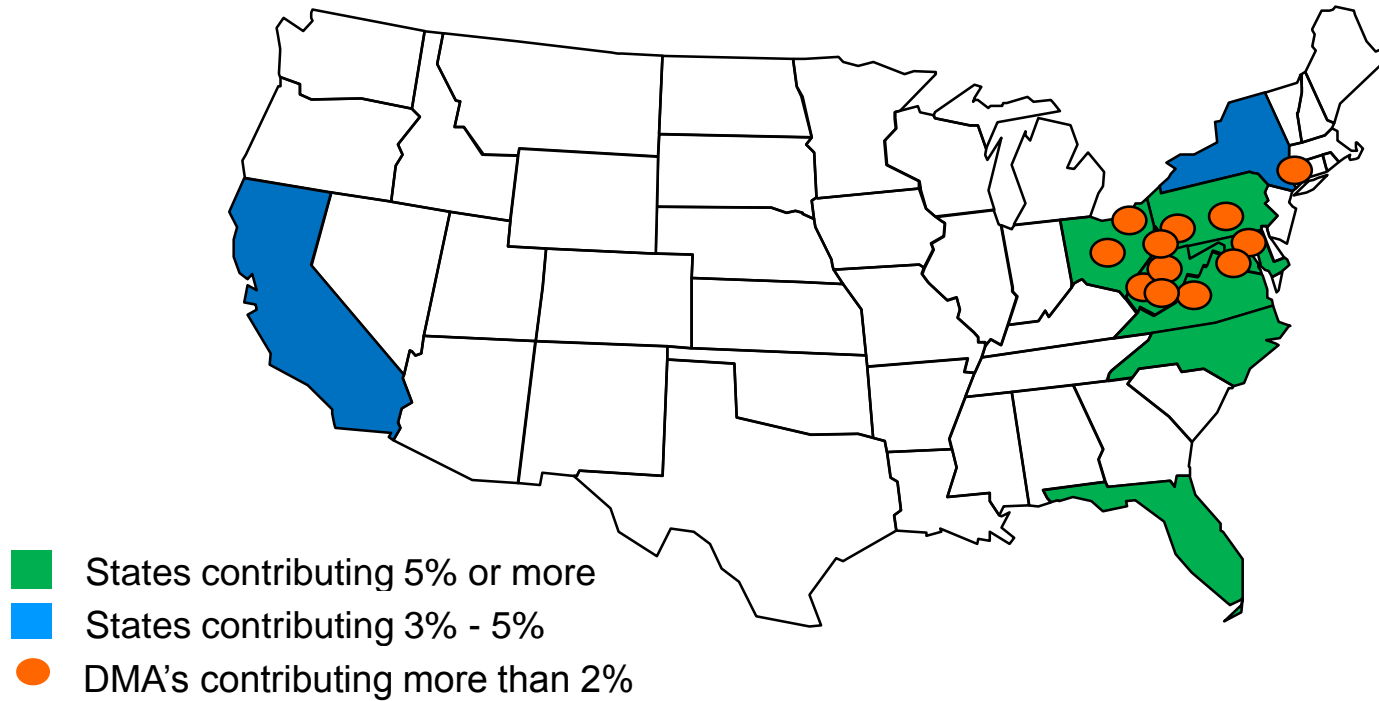
Base: Total Overnight Person-Trips to West Virginia



Sources of Business



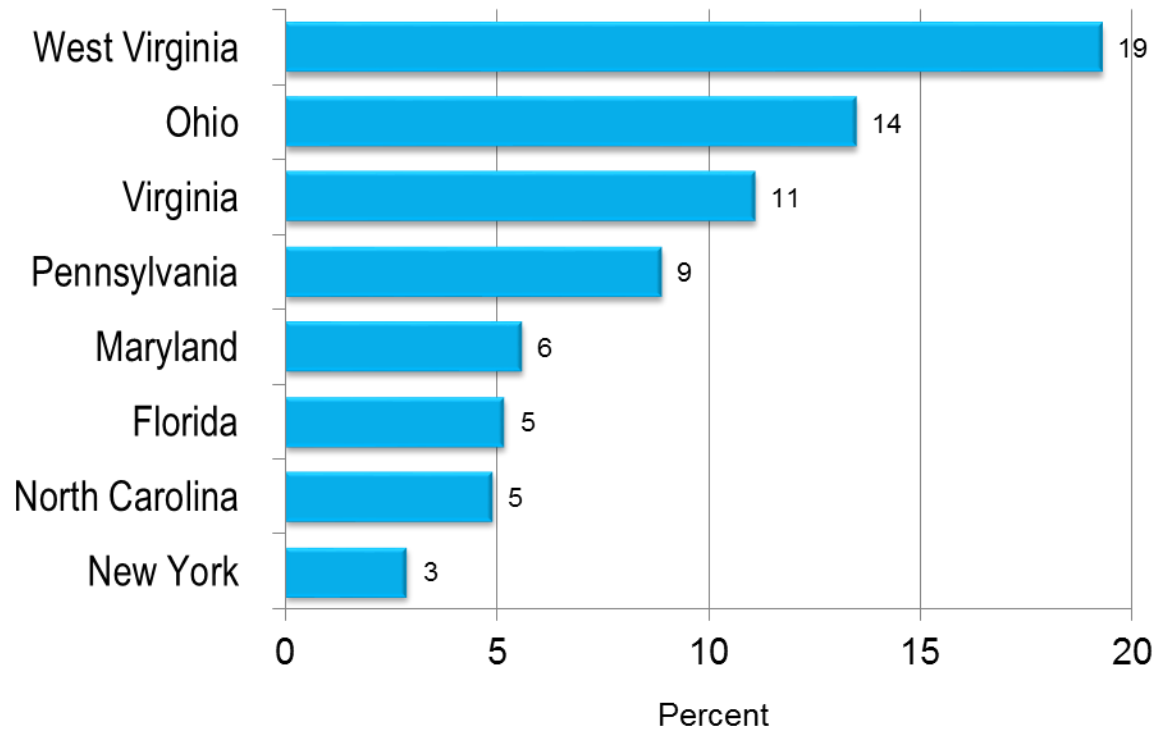
Base: Overnight Person-Trips to West Virginia



State Origin Of Trip



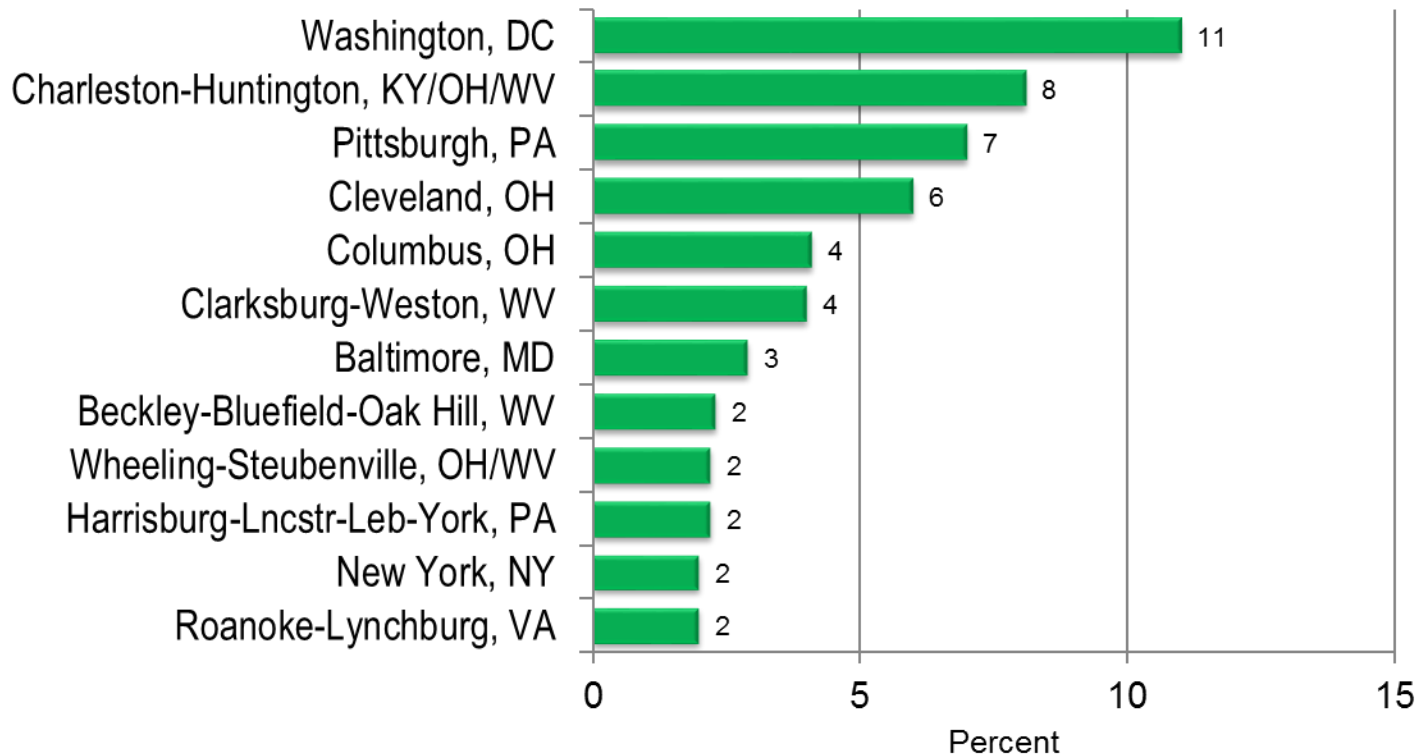
Base: Total Overnight Person-Trips to West Virginia



DMA Origin Of Trip



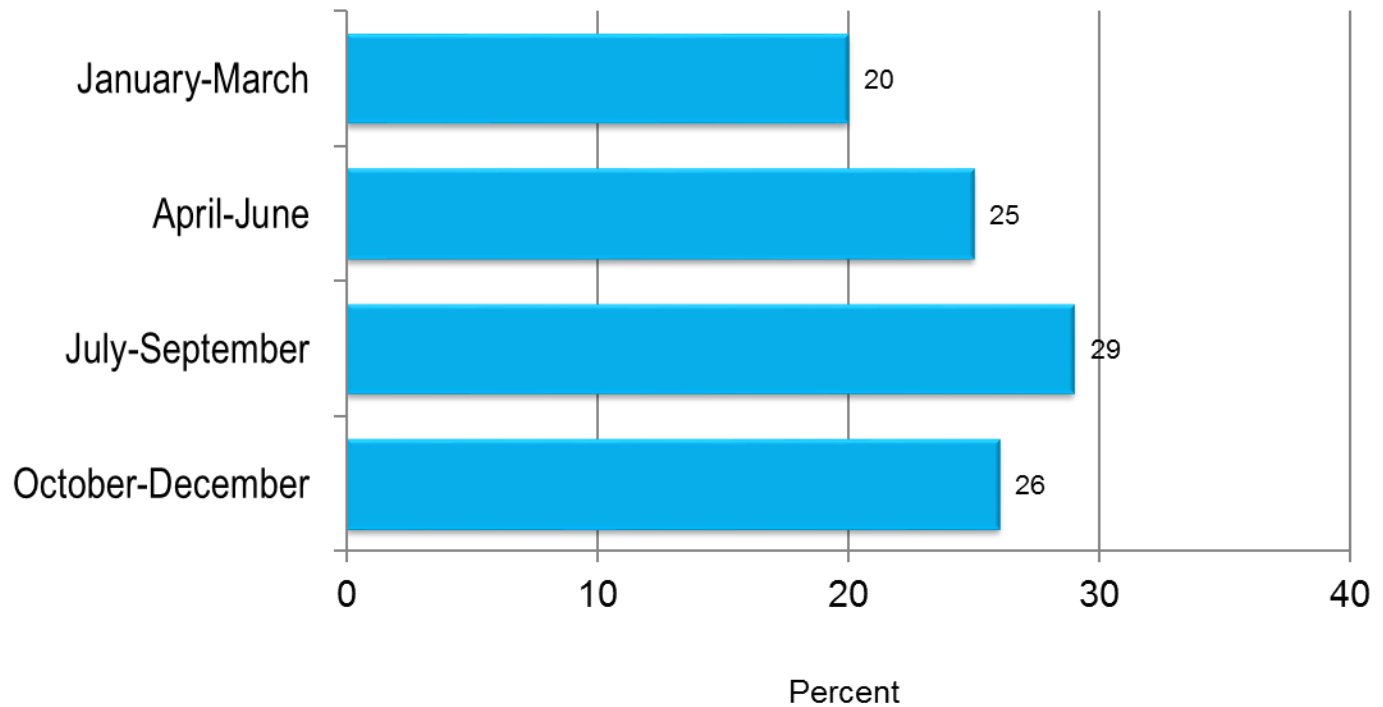
Base: Total Overnight Person-Trips to West Virginia



Season of Trip



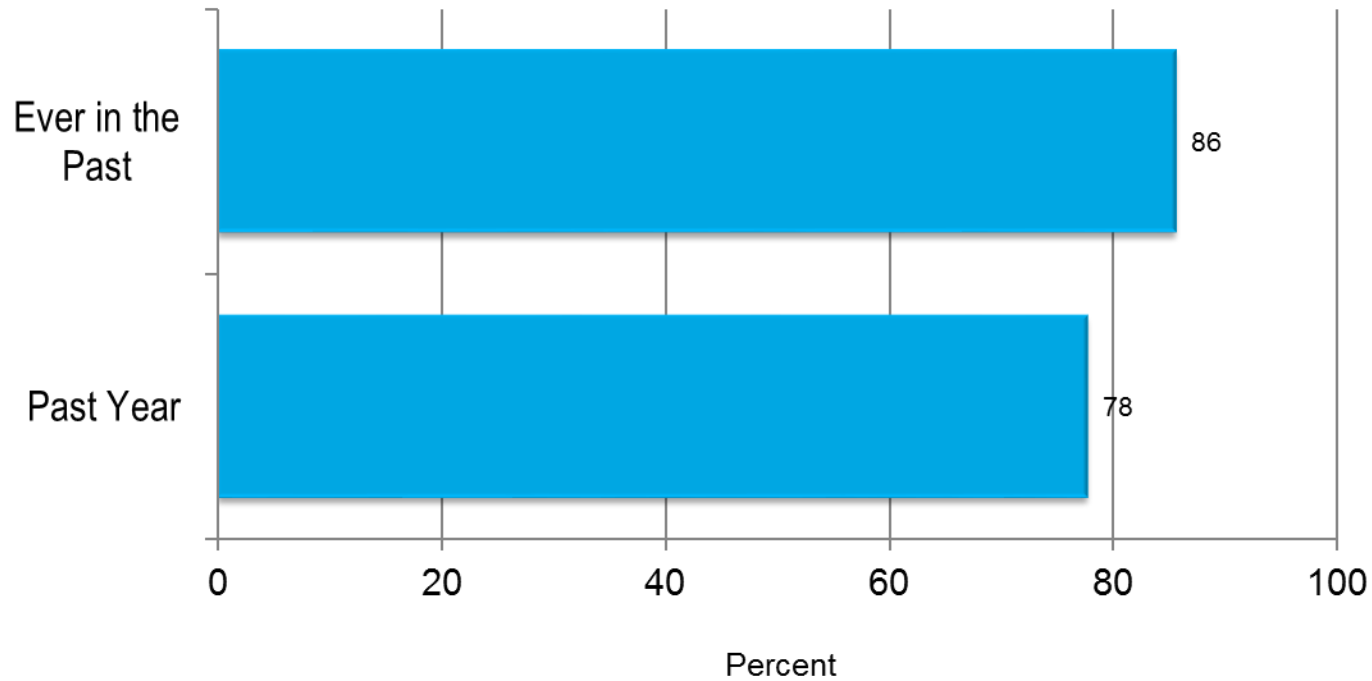
Base: Total Overnight Person-Trips to West Virginia



Past Visitation to West Virginia



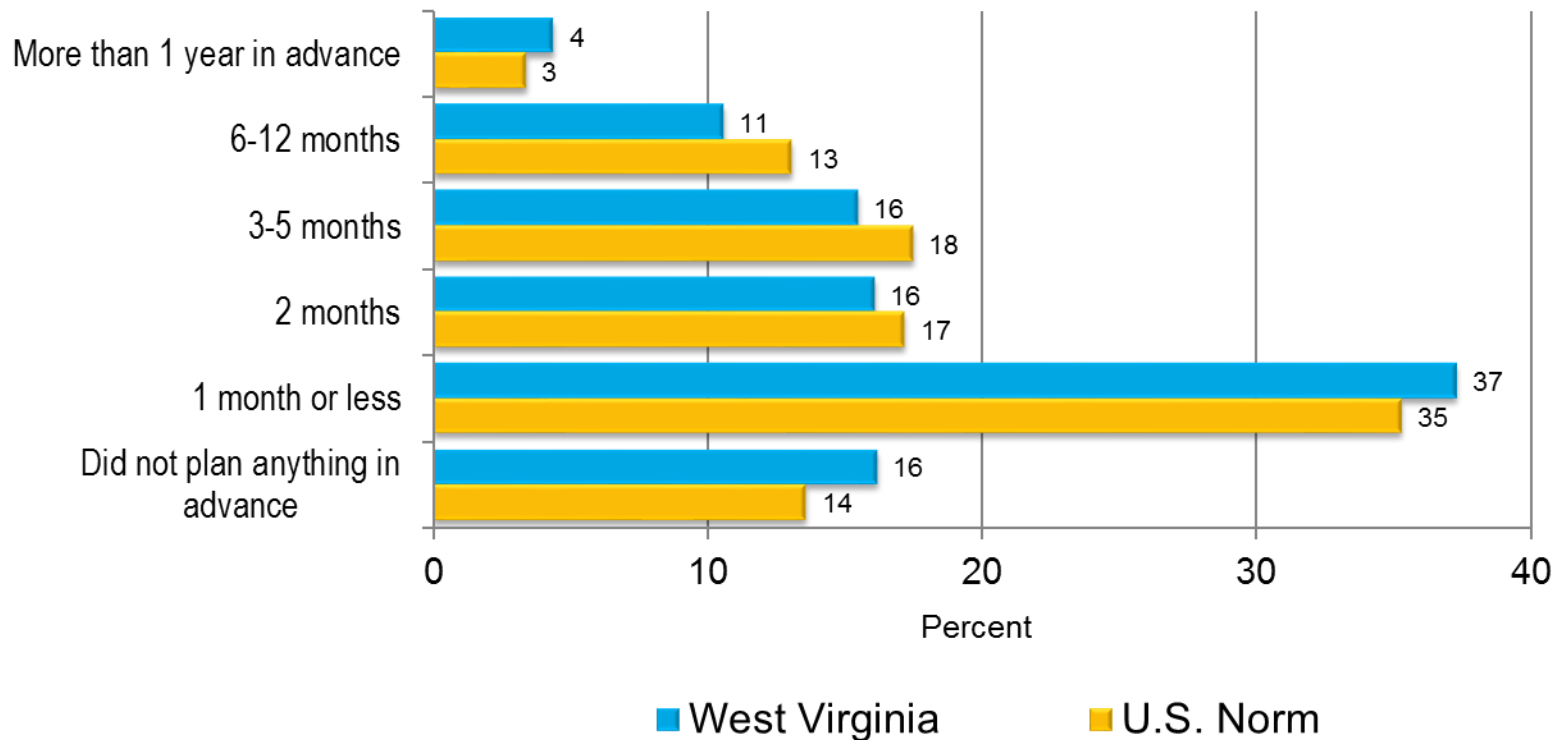
Base: Total Overnight Person-Trips to West Virginia



Length of Trip Planning



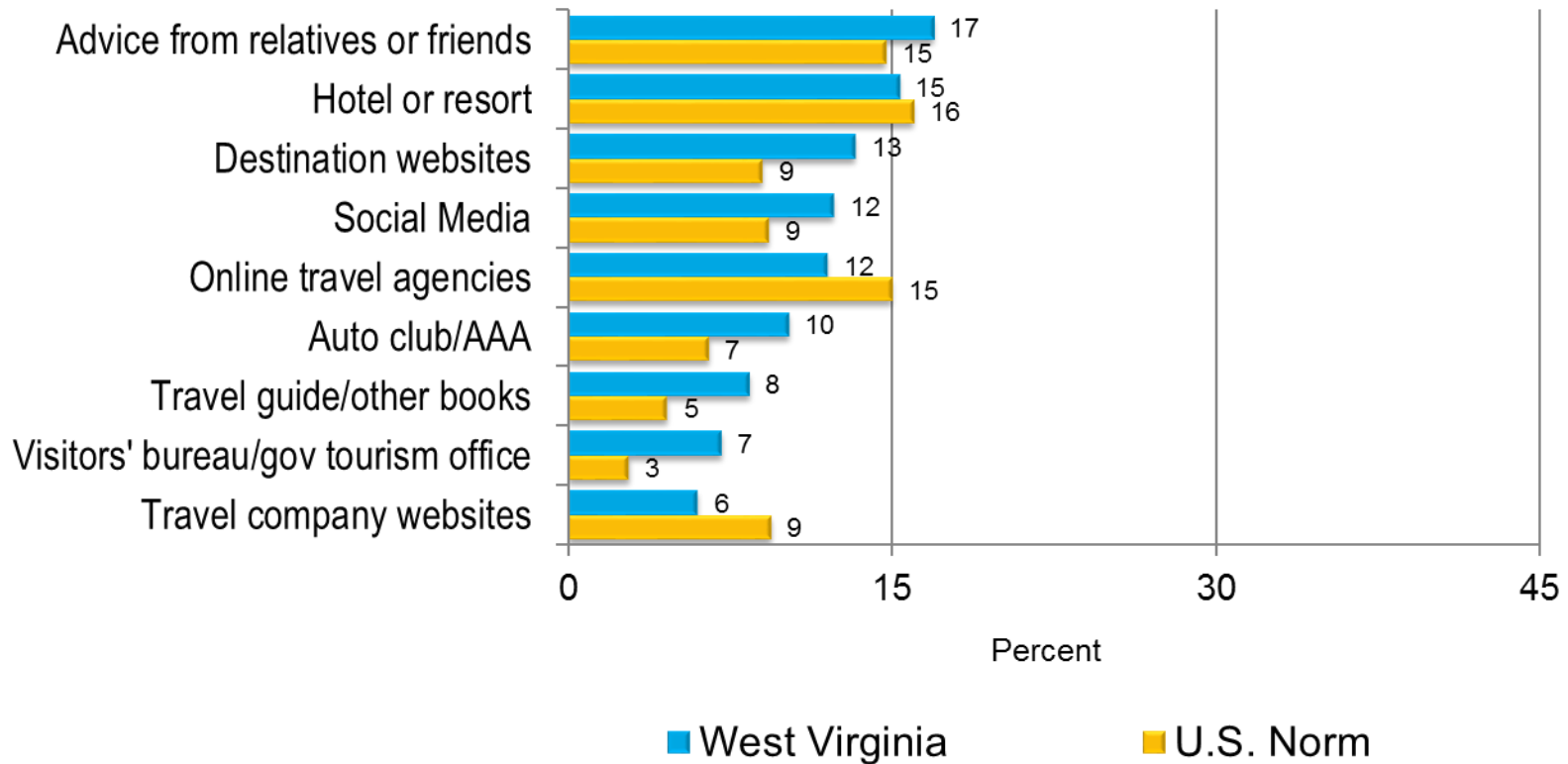
Base: Total Overnight Person-Trips



Trip Planning Information Sources



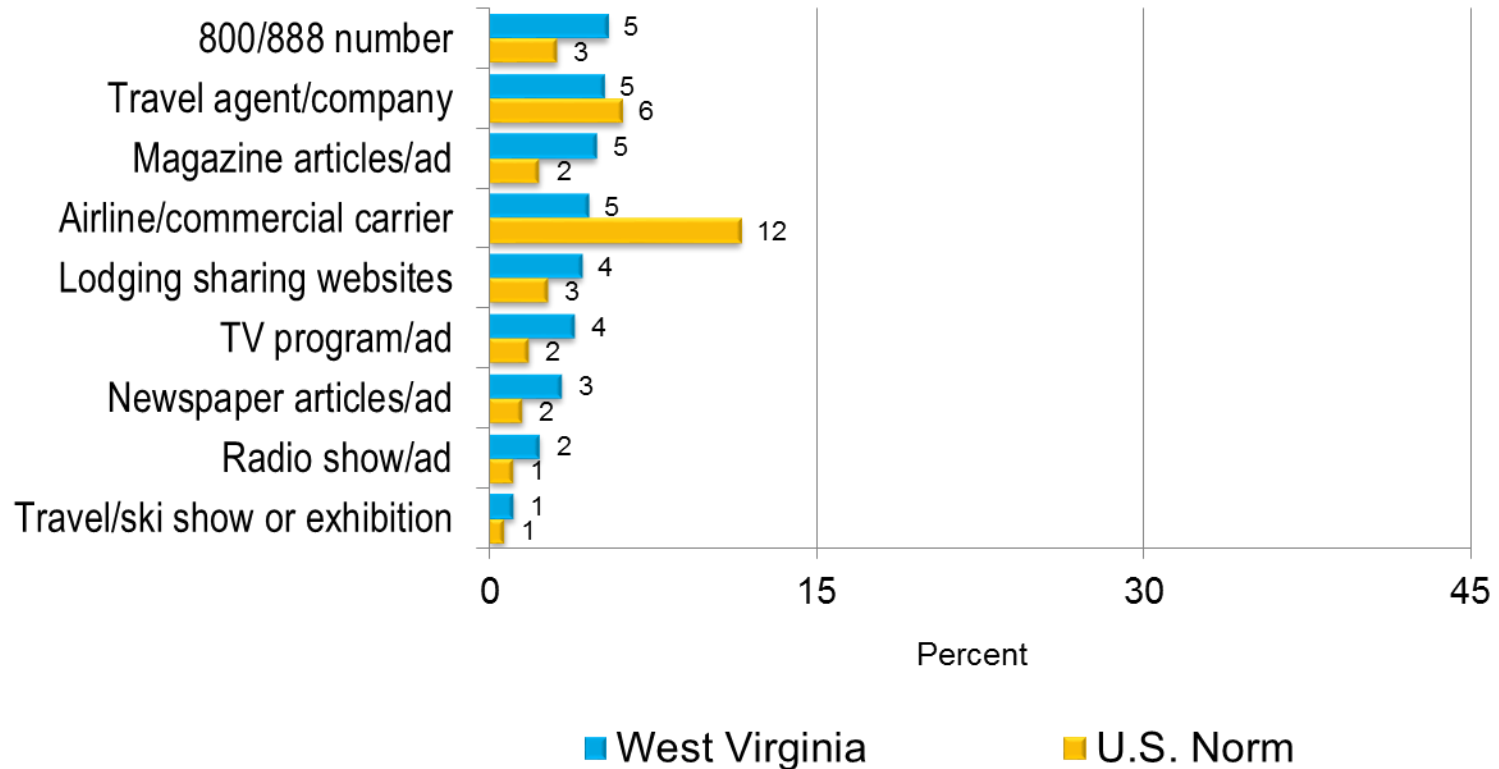
Base: Total Overnight Person-Trips



Trip Planning Information Sources (Cont'd)



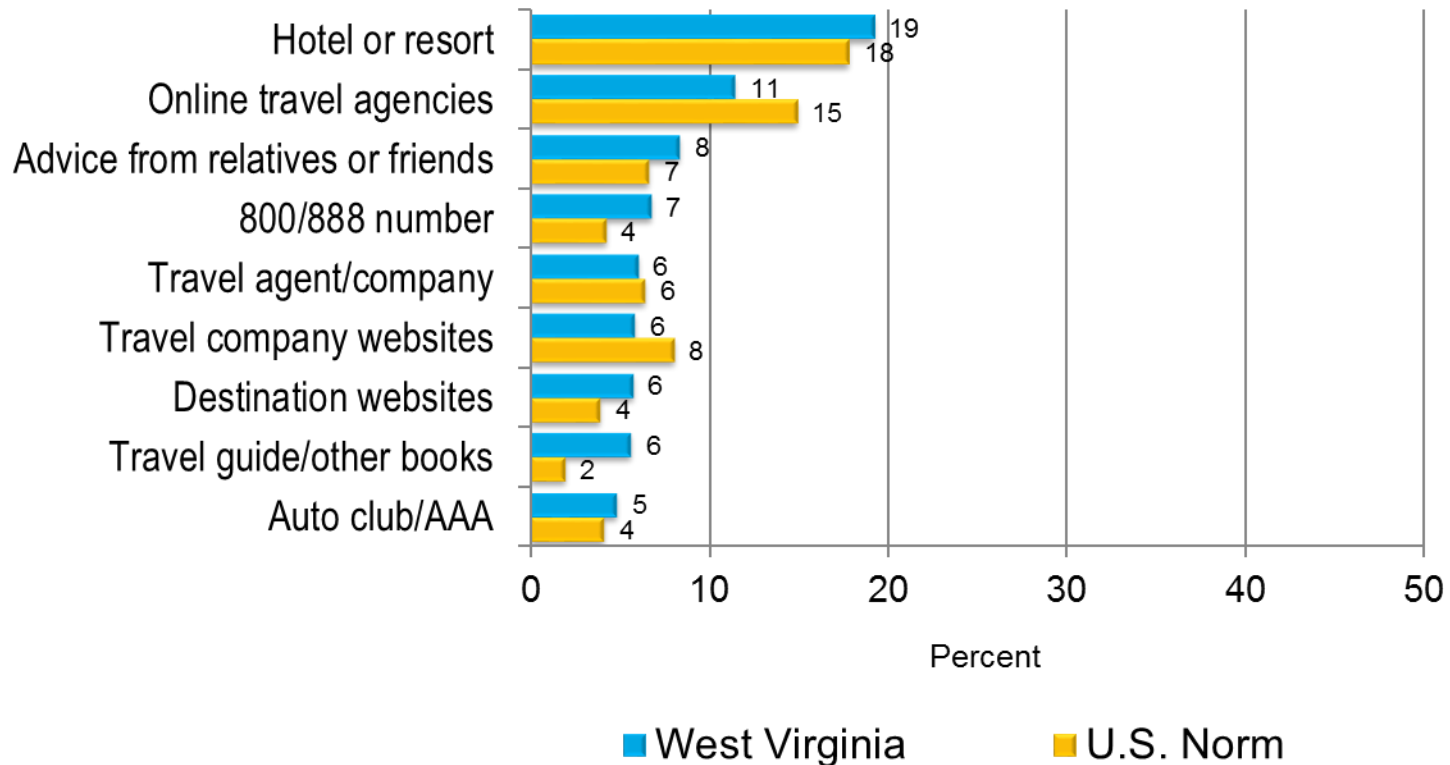
Base: Total Overnight Person-Trips



Method of Booking



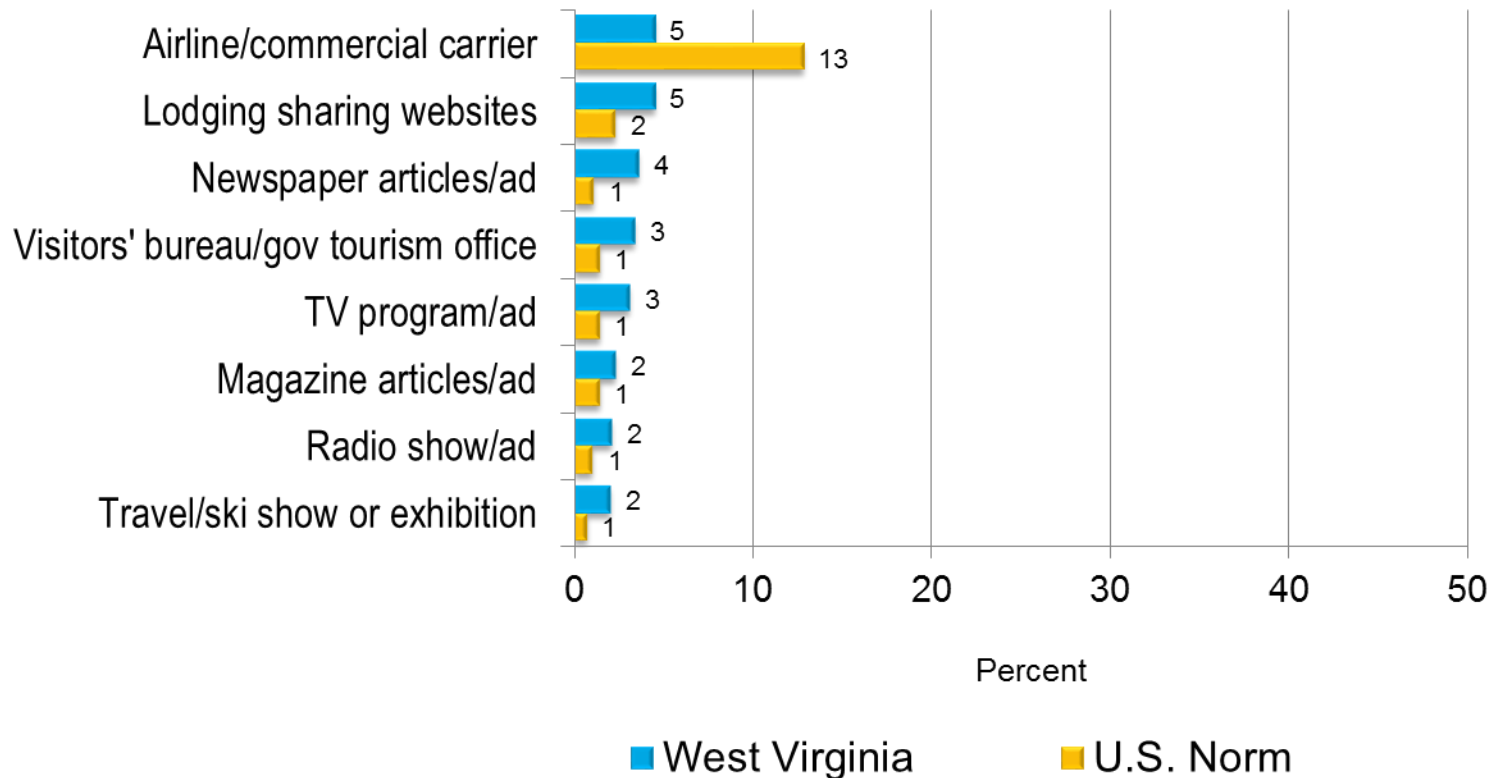
Base: Total Overnight Person-Trips



Method of Booking (Cont'd)



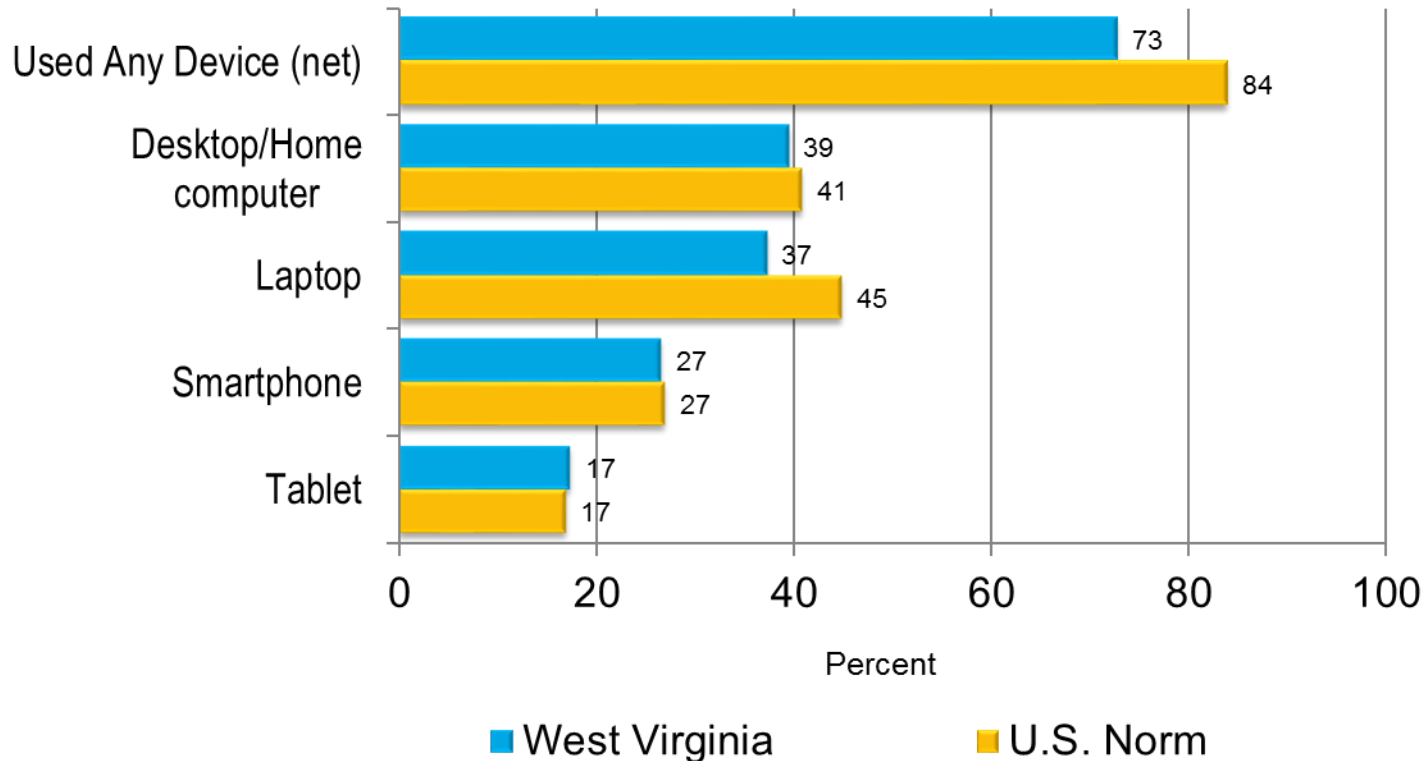
Base: Total Overnight Person-Trips



Devices Used for Trip Planning



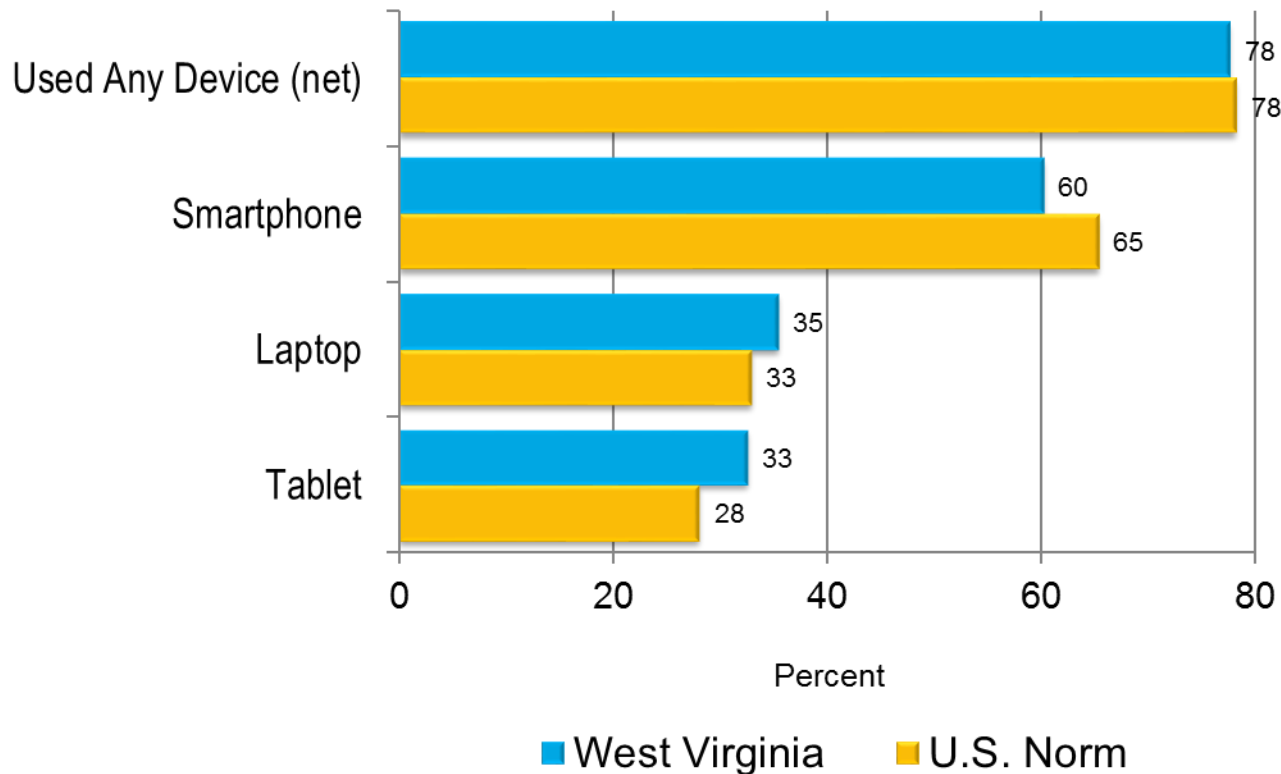
Base: Total Overnight Person-Trips



Devices Used During Trip



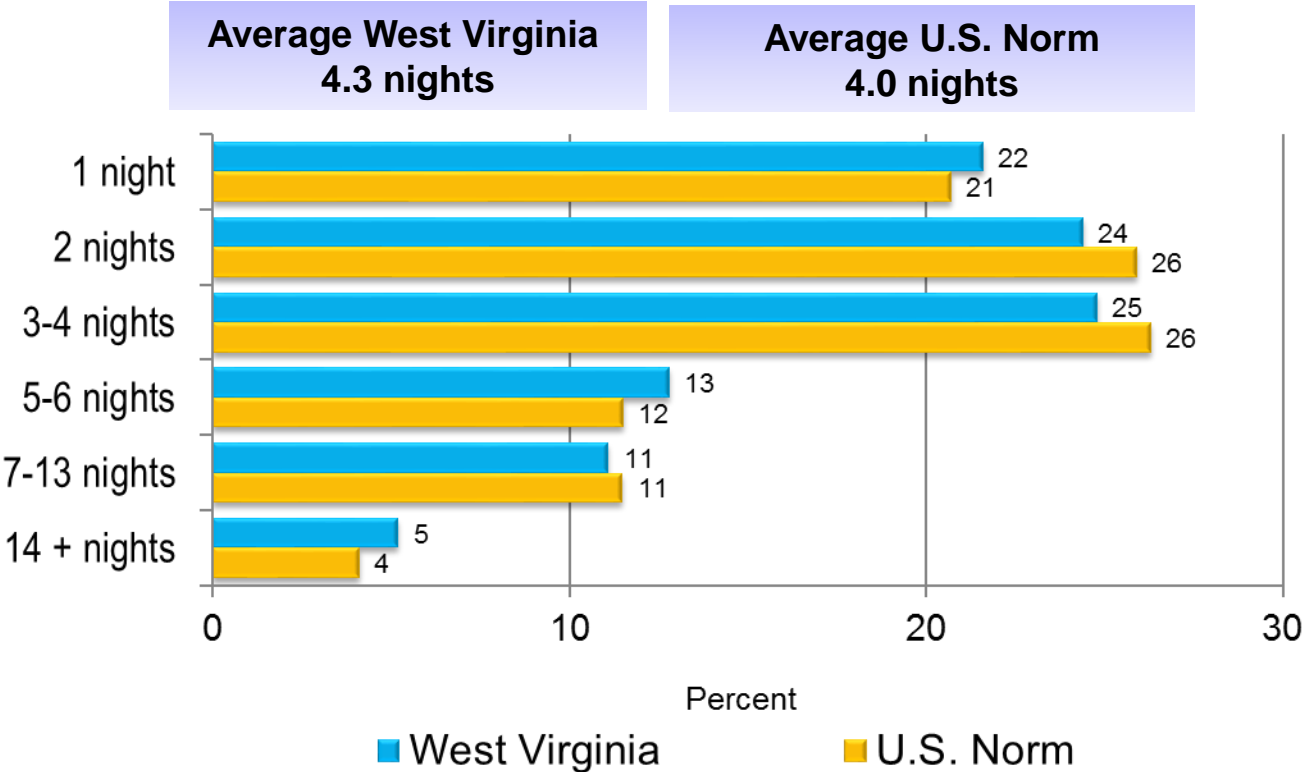
Base: Total Overnight Person-Trips



Total Nights Away on Trip



Base: Total Overnight Person-Trips

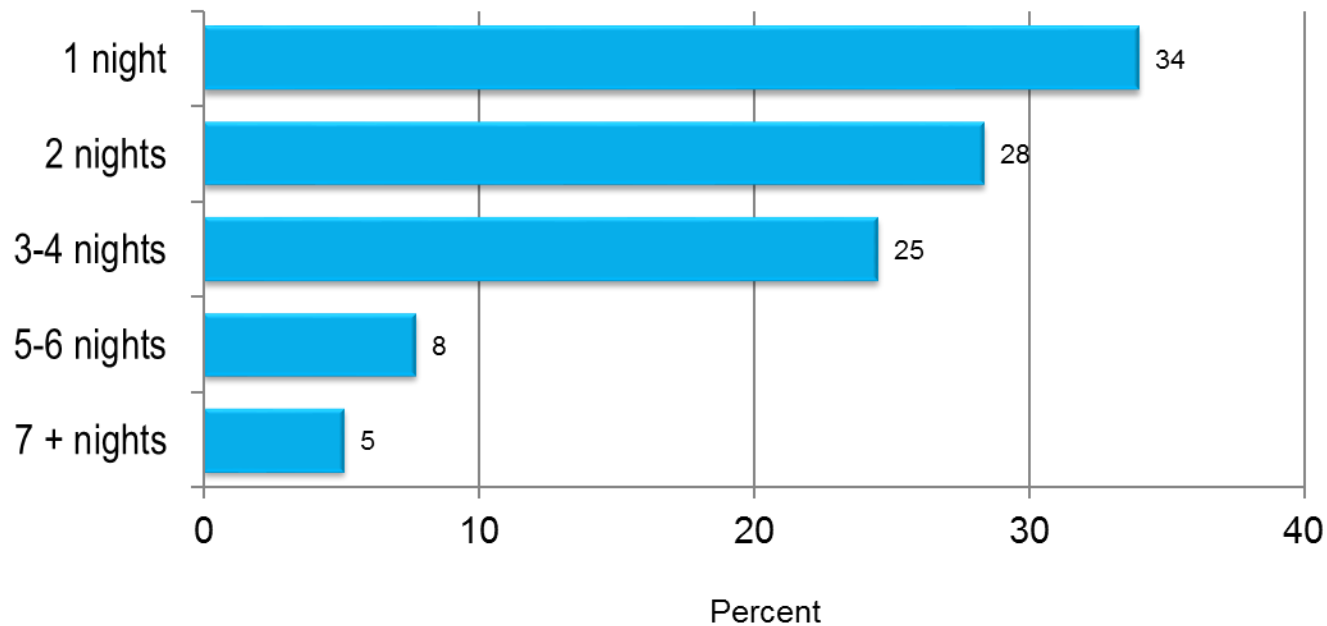


Number of Nights Spent in West Virginia



Base: Overnight Person-Trips with 1+ Nights Spent In West Virginia

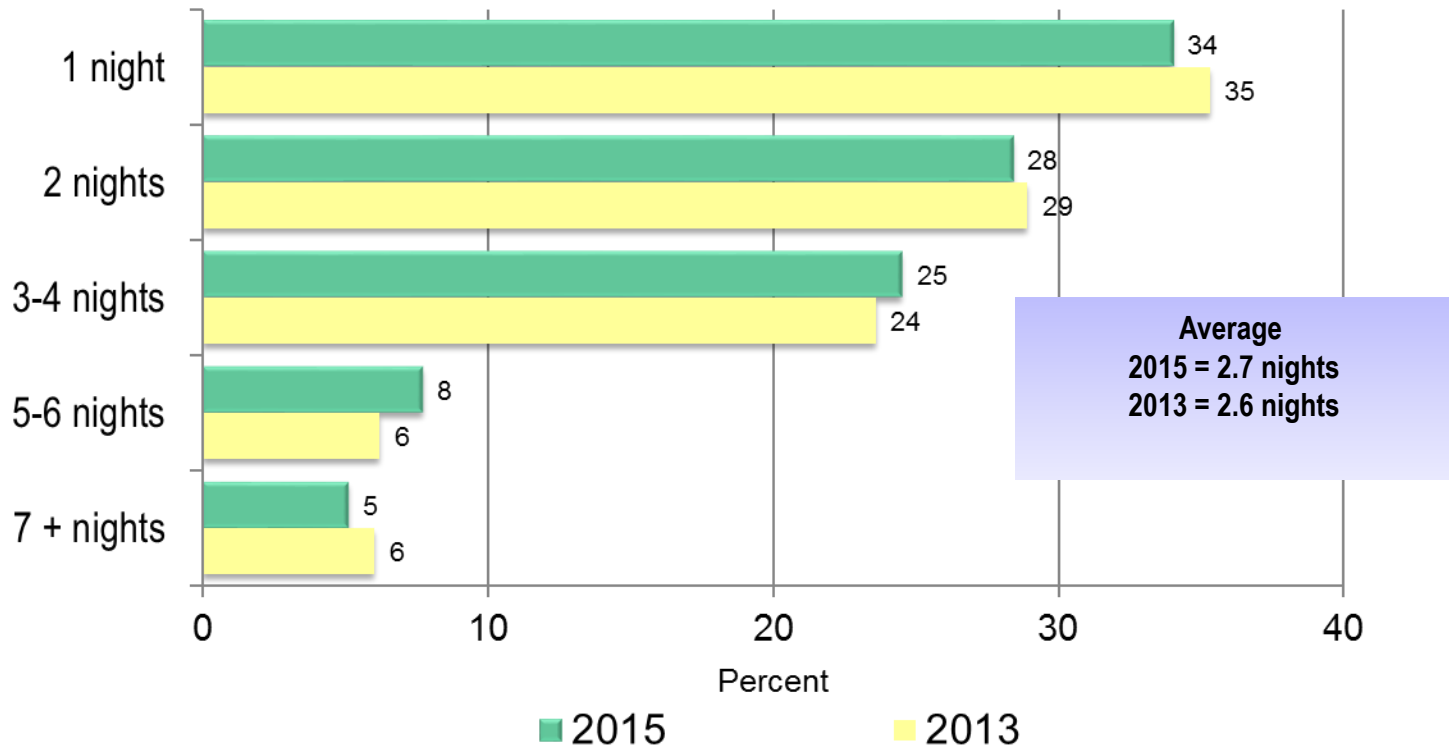
Average Nights Spent in West Virginia = 2.7



Number of Nights Spent in West Virginia 2015 vs. 2013



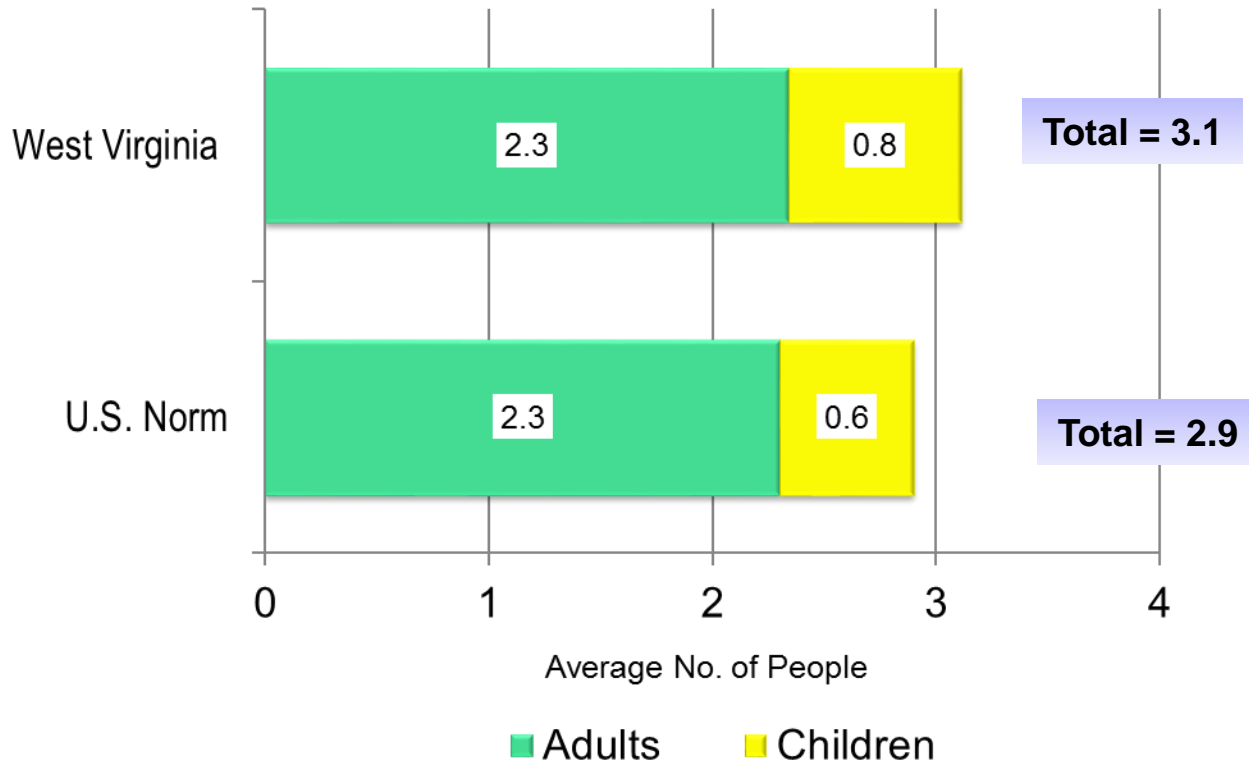
Base: Overnight Person-Trips with 1+ Nights Spent In West Virginia



Size of Travel Party



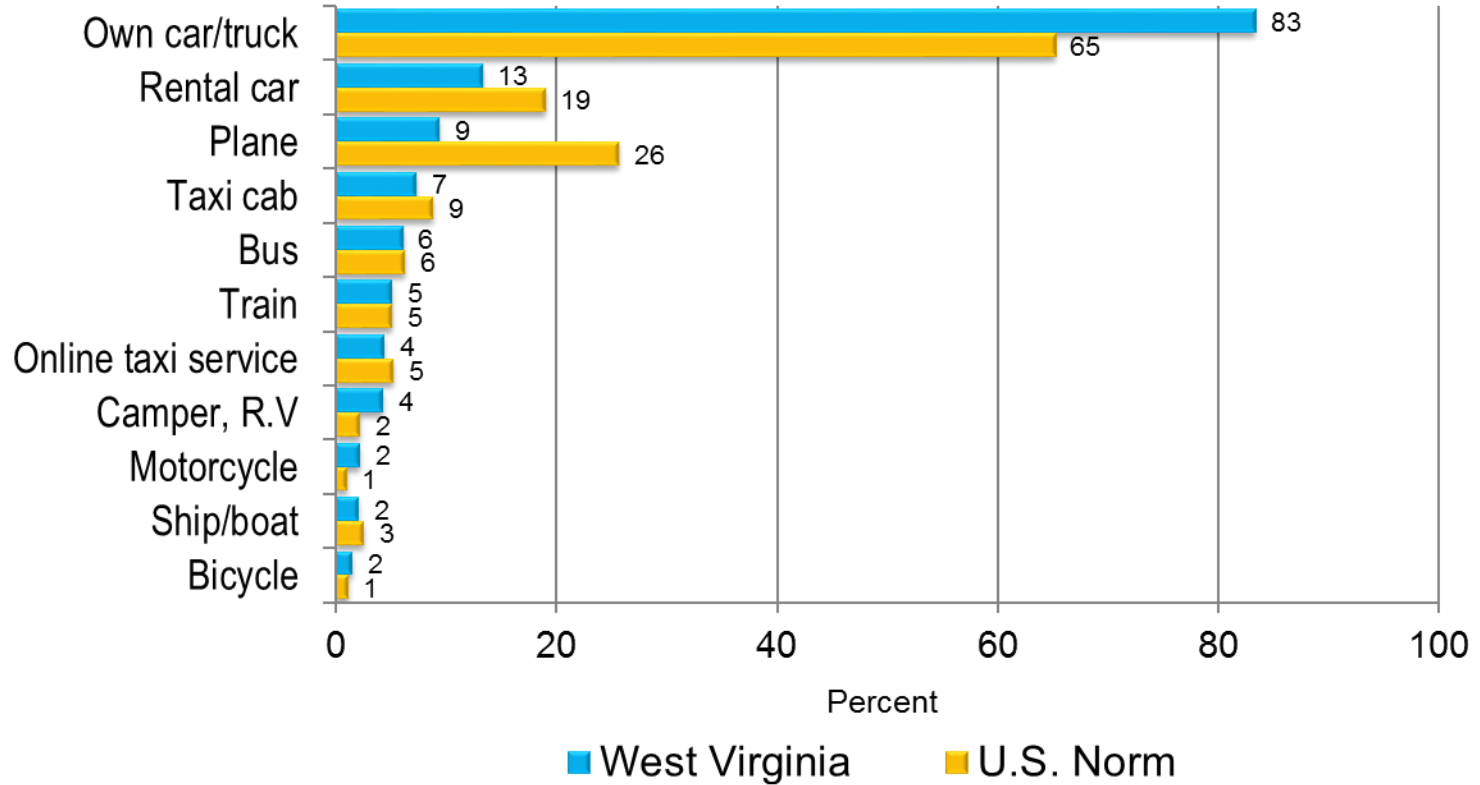
Base: Total Overnight Person-Trips



Transportation



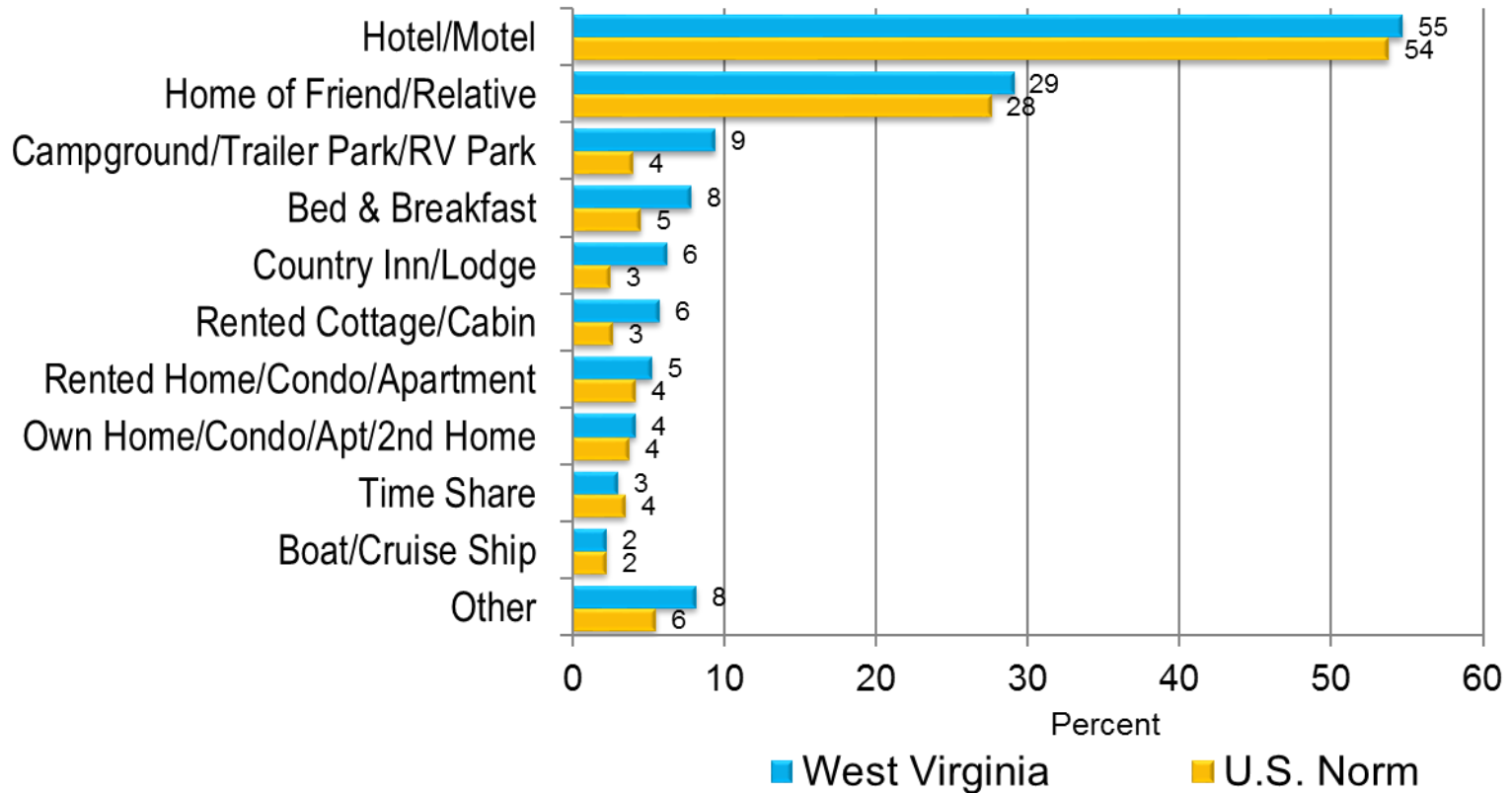
Base: Total Overnight Person-Trips



Accommodations



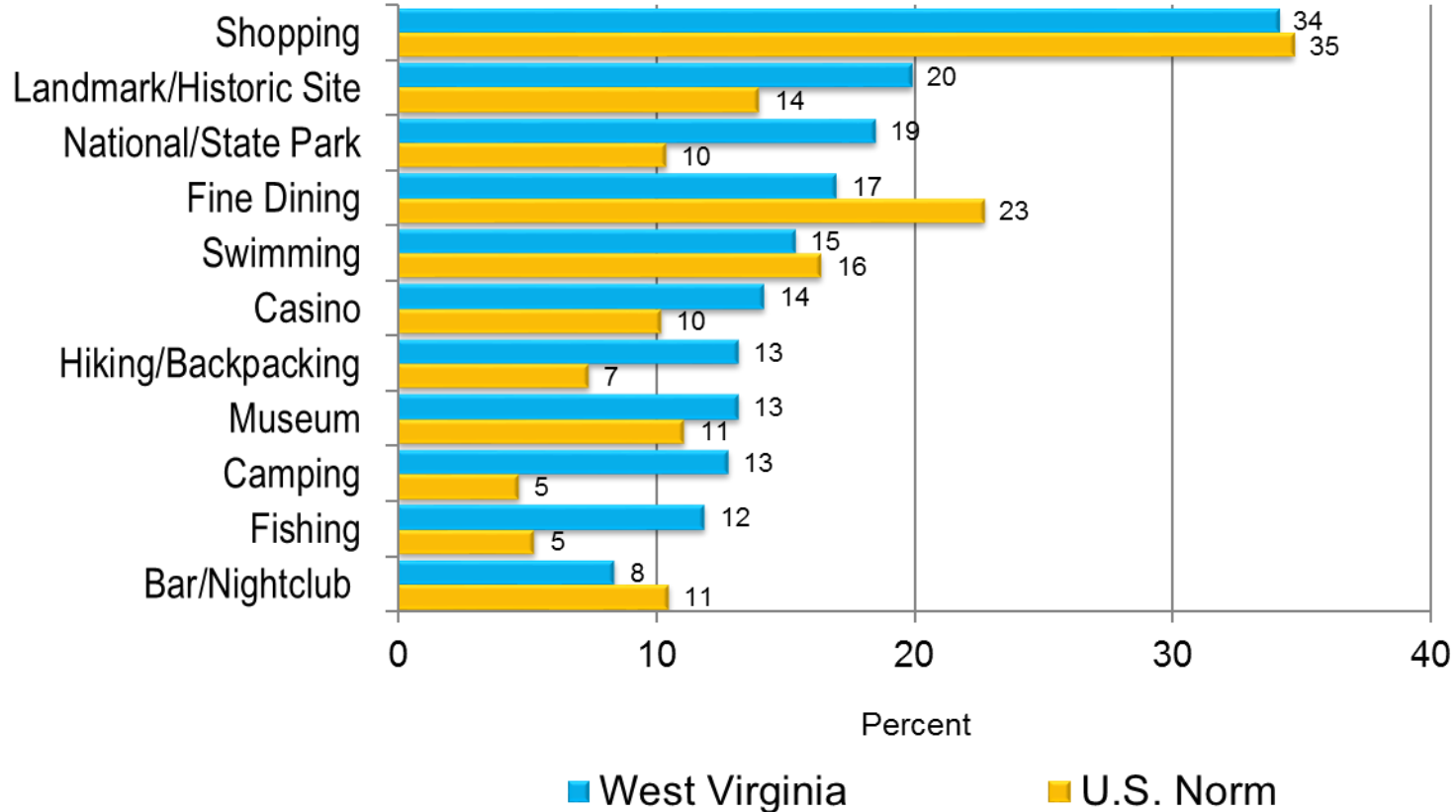
Base: Total Overnight Person-Trips



Activities and Experiences



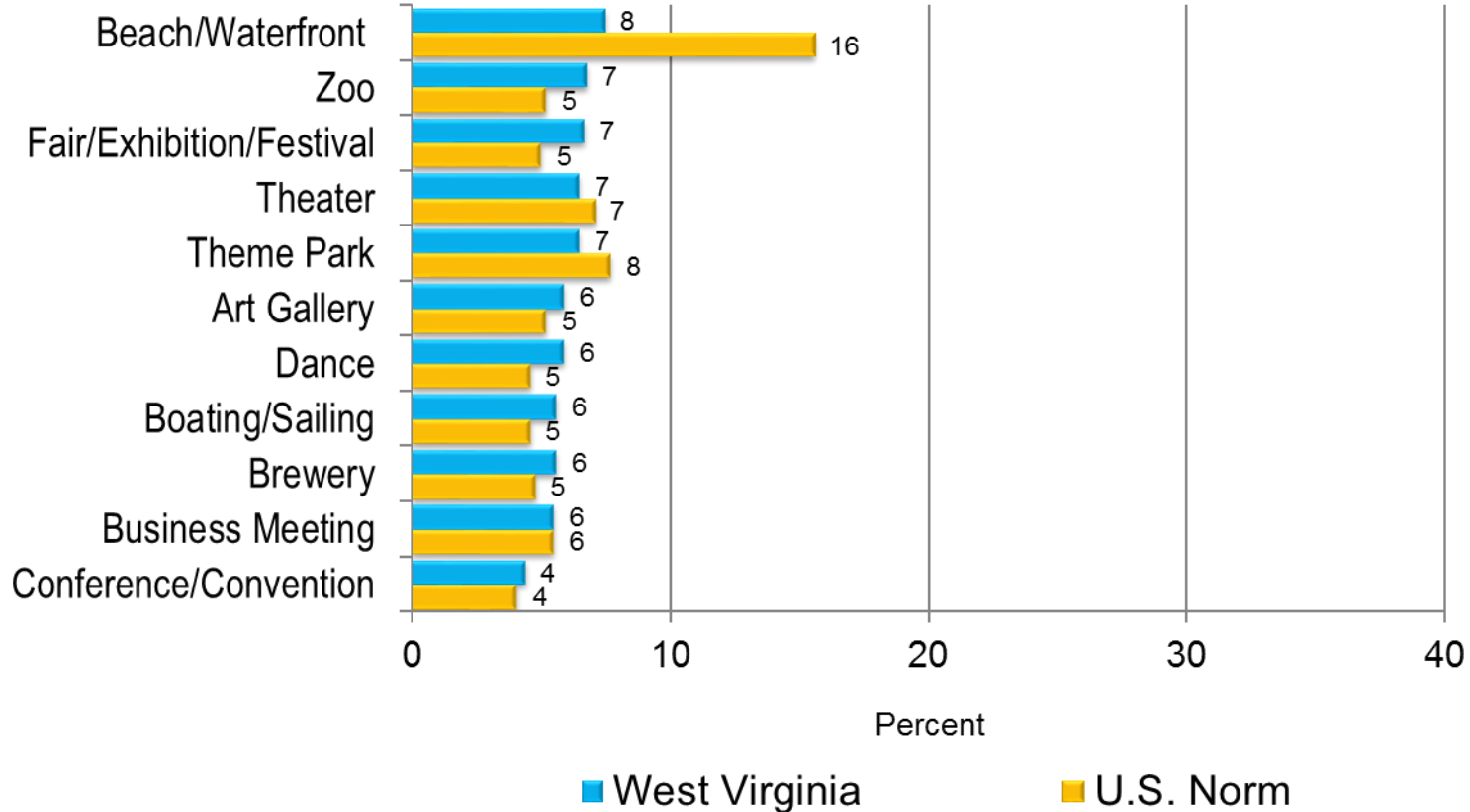
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



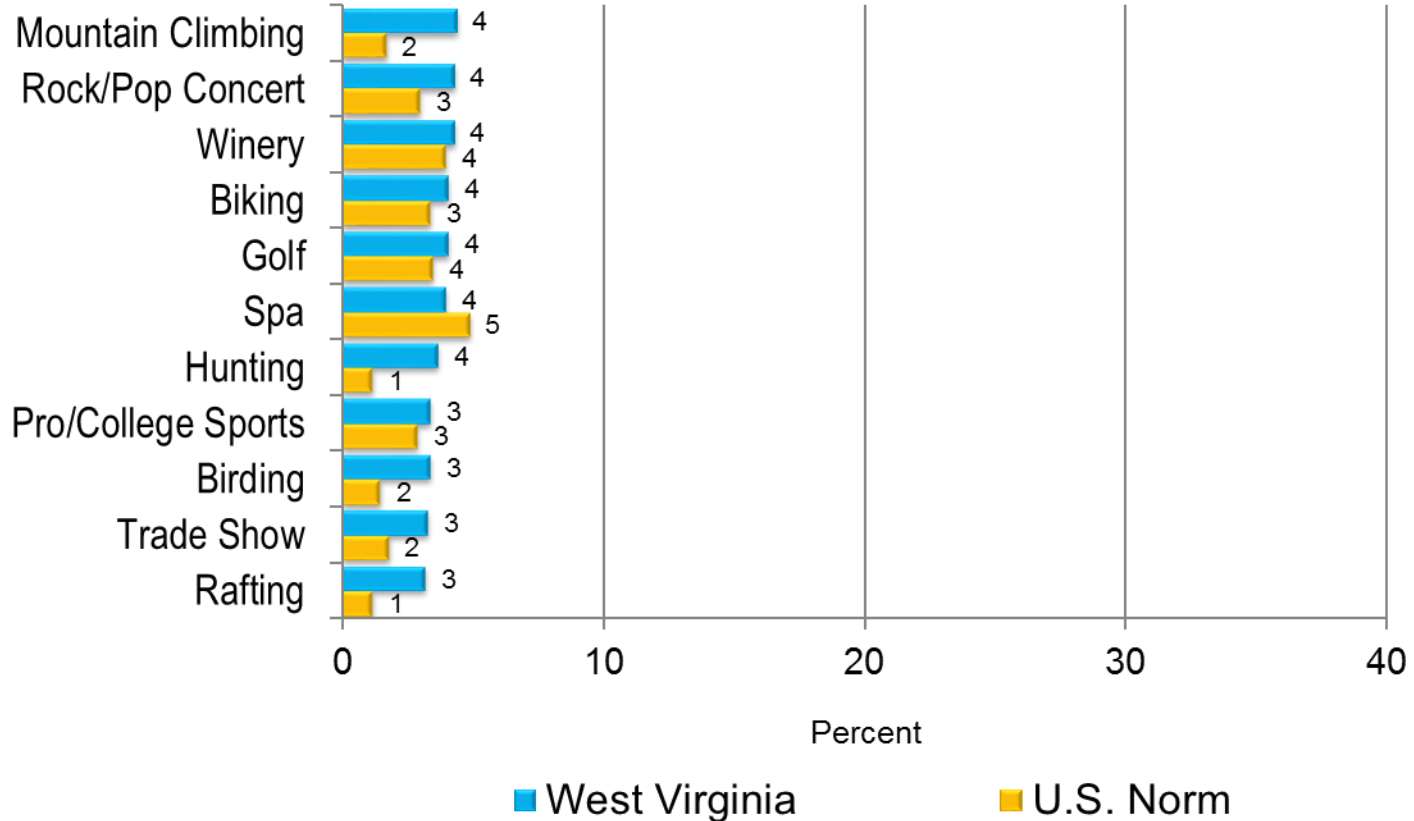
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



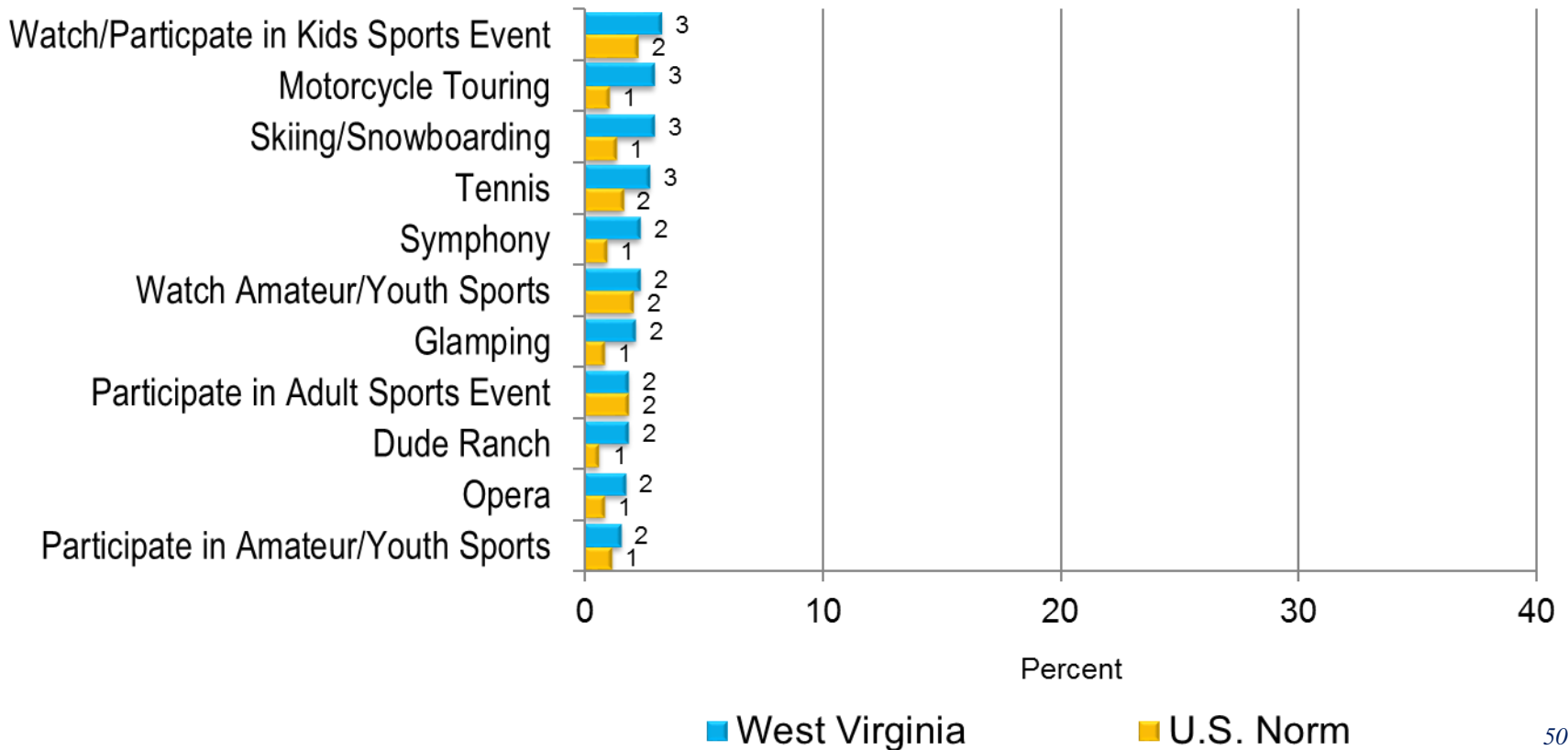
Base: Total Overnight Person-Trips



Activities and Experiences (Cont'd)



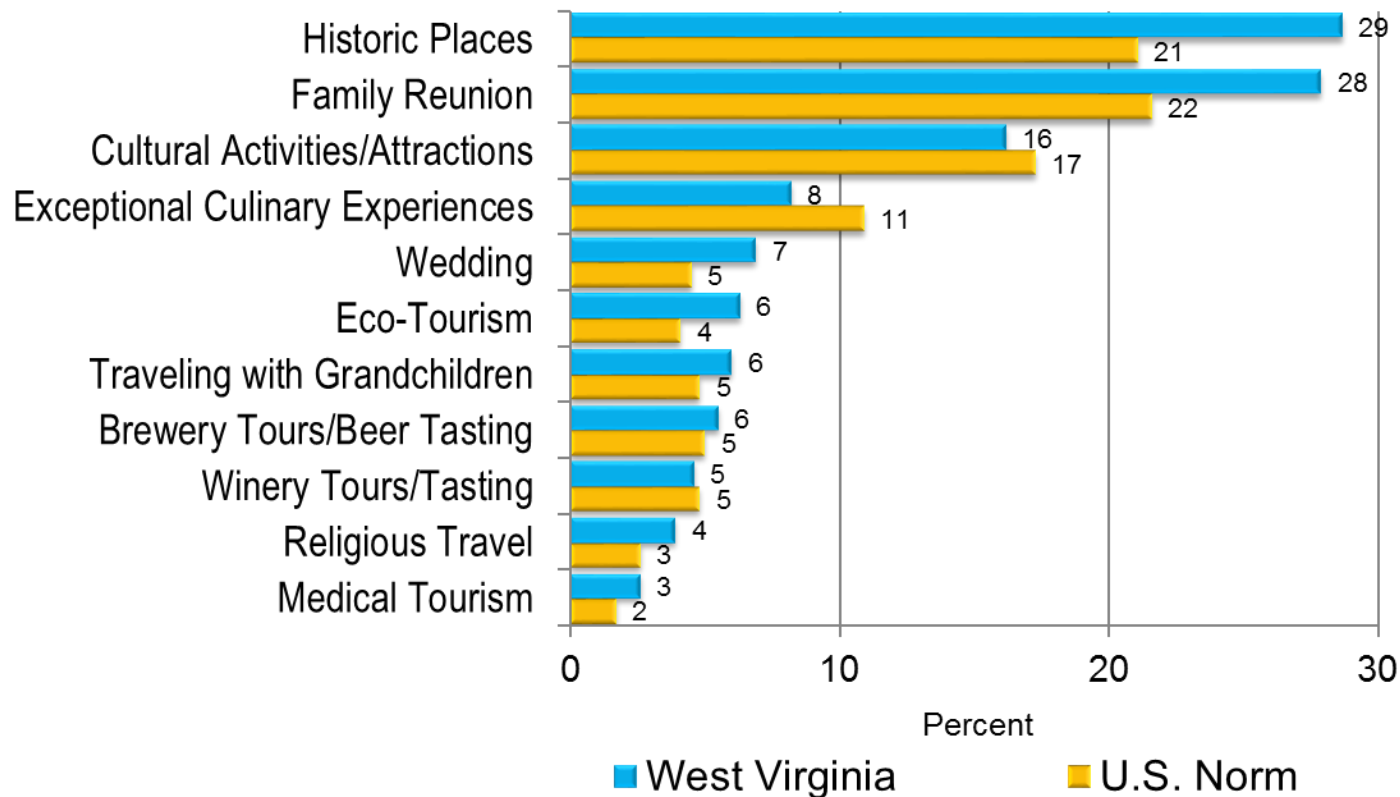
Base: Total Overnight Person-Trips



Activities of Special Interest



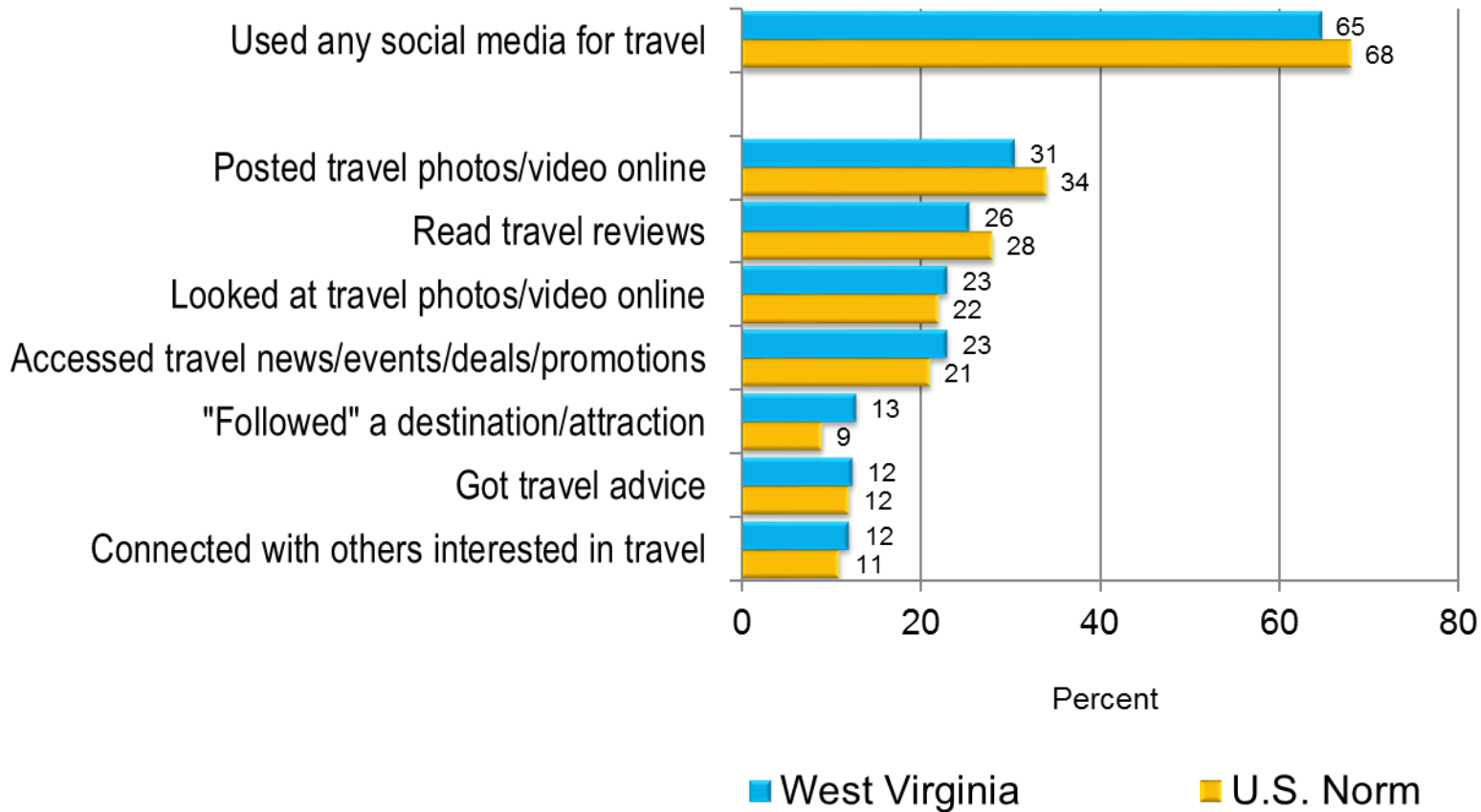
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers



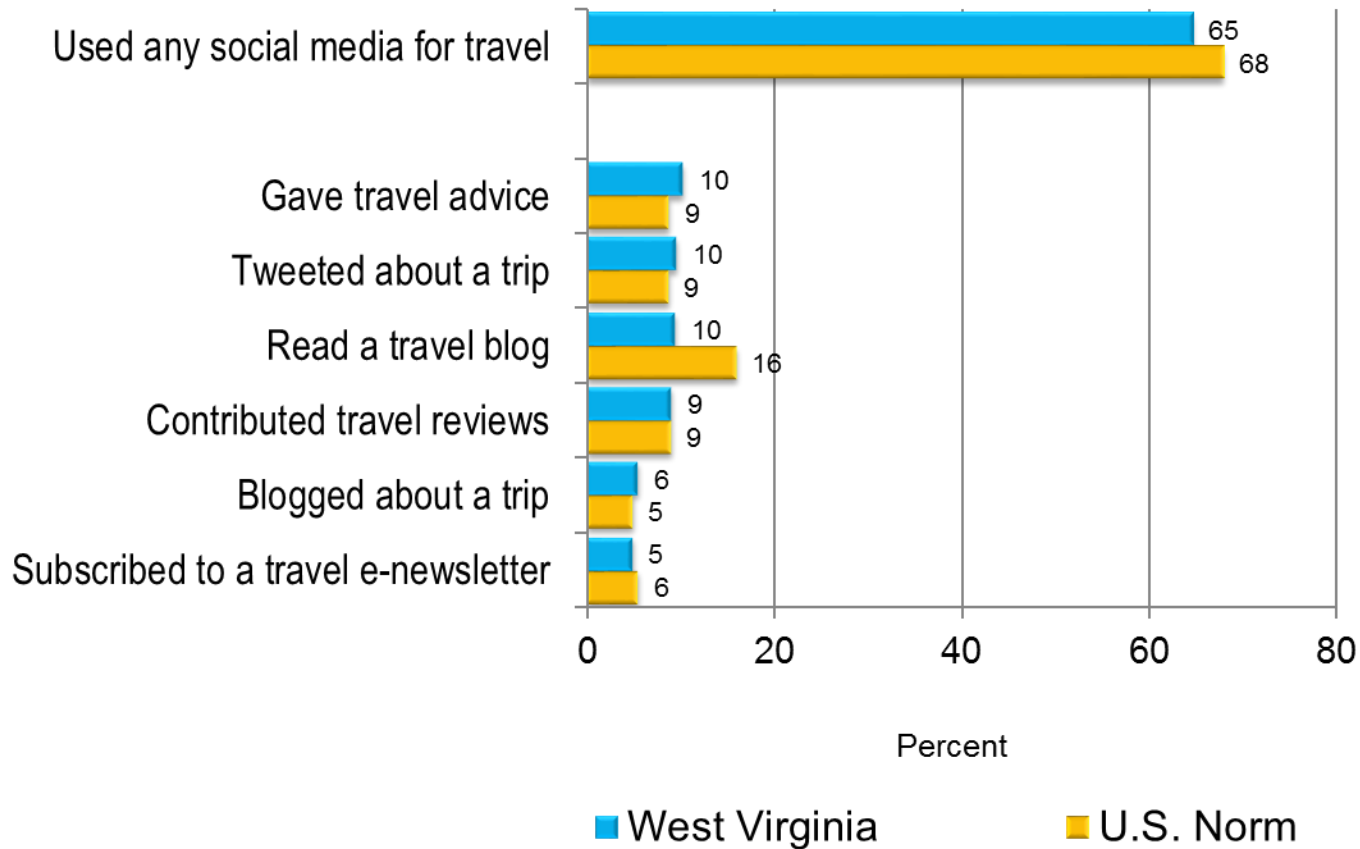
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers (Cont'd)



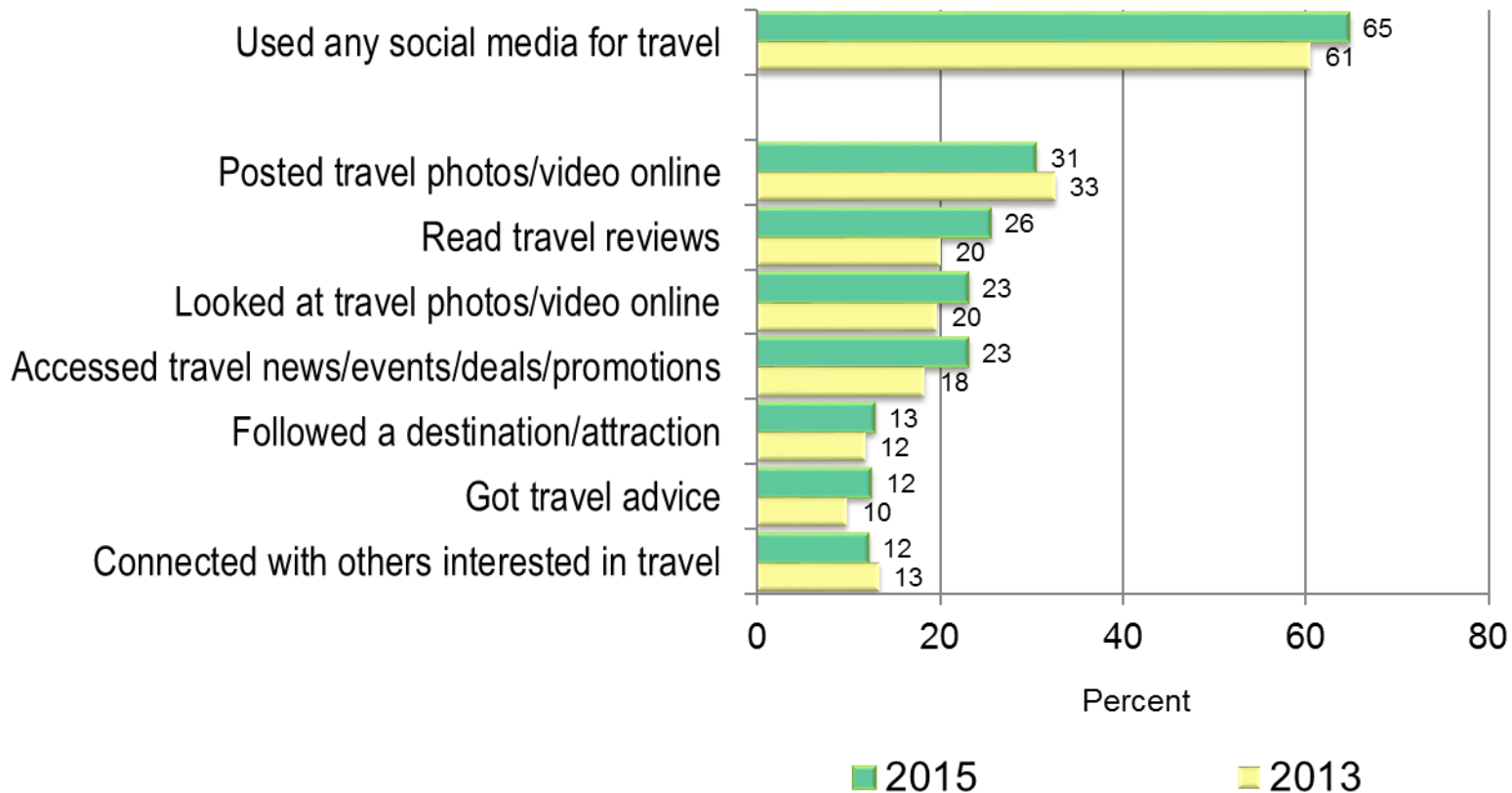
Base: Total Overnight Person-Trips



Online Social Media Use by Travelers in West Virginia – 2015 vs. 2013



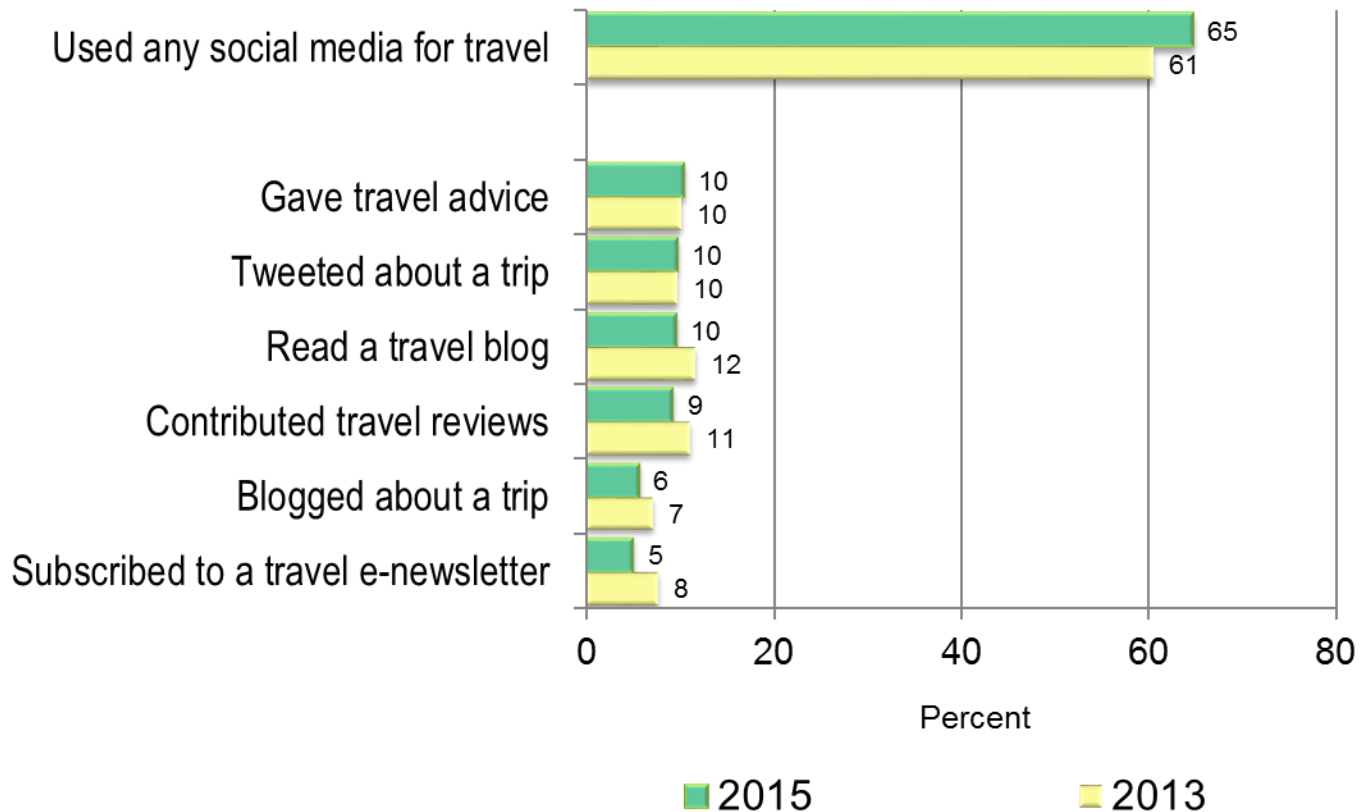
Base: Total Overnight Person-Trips to West Virginia



Online Social Media Use by Travelers in West Virginia– 2015 vs. 2013 (Cont'd)



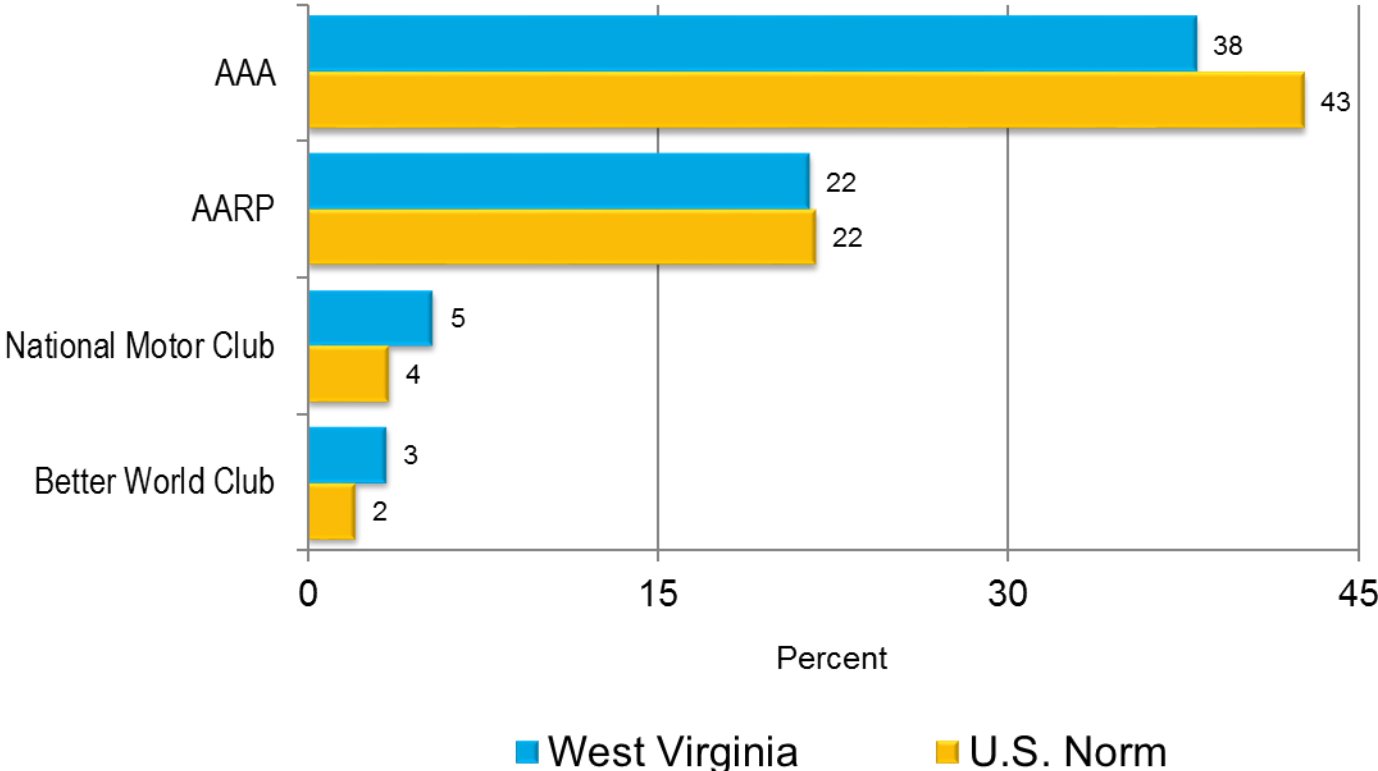
Base: Total Overnight Person-Trips to West Virginia



Organization Membership



Base: Total Overnight Person-Trips



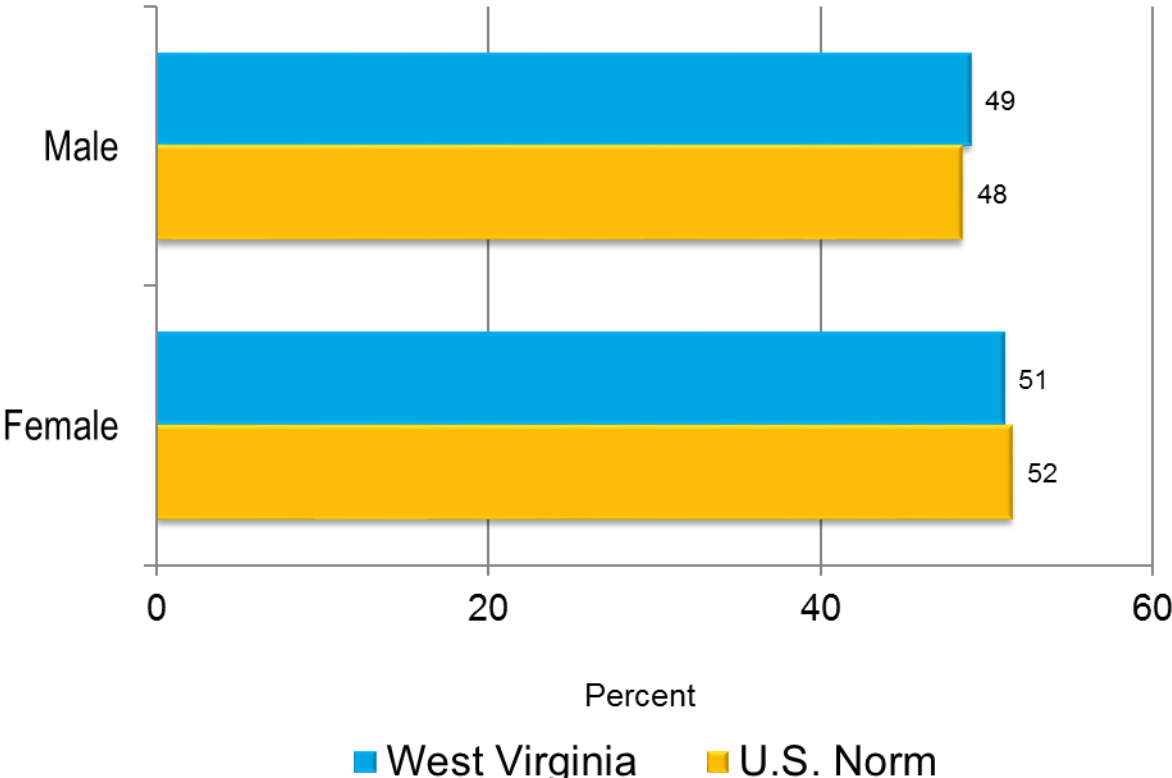


Demographic Profile of Overnight Visitors

Gender



Base: Total Overnight Person-Trips



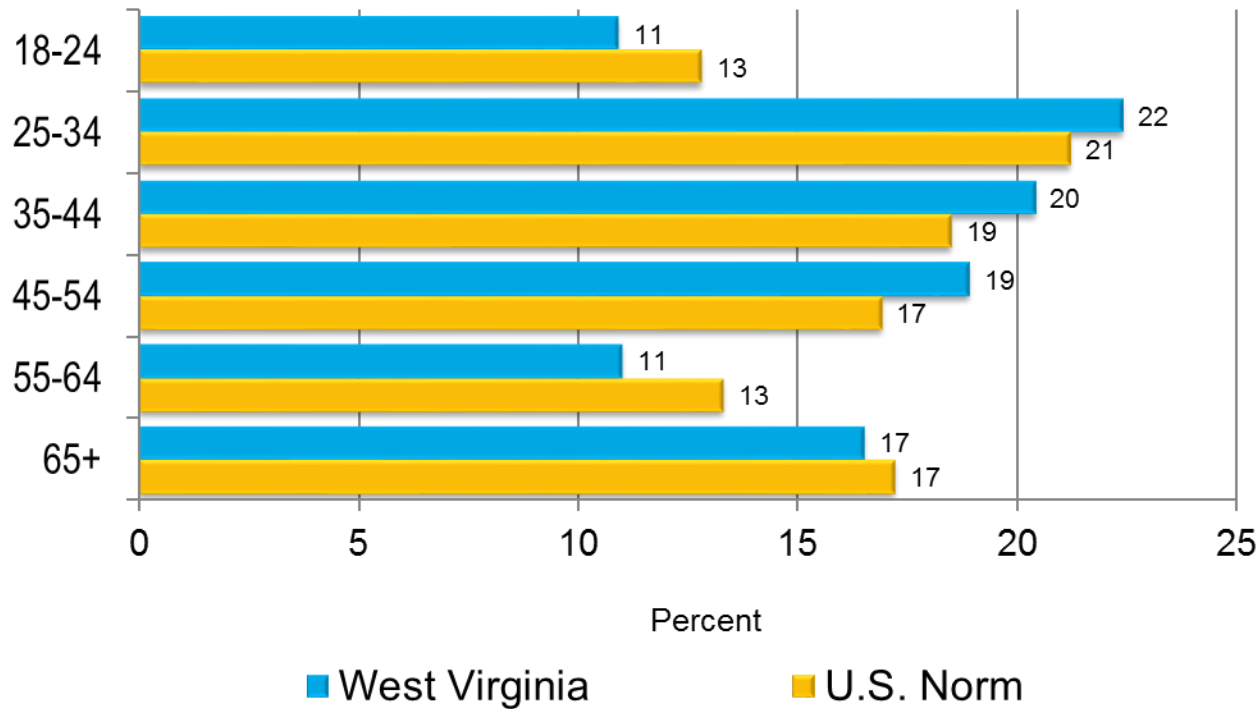
Age



Base: Total Overnight Person-Trips

Average West Virginia = 44.7

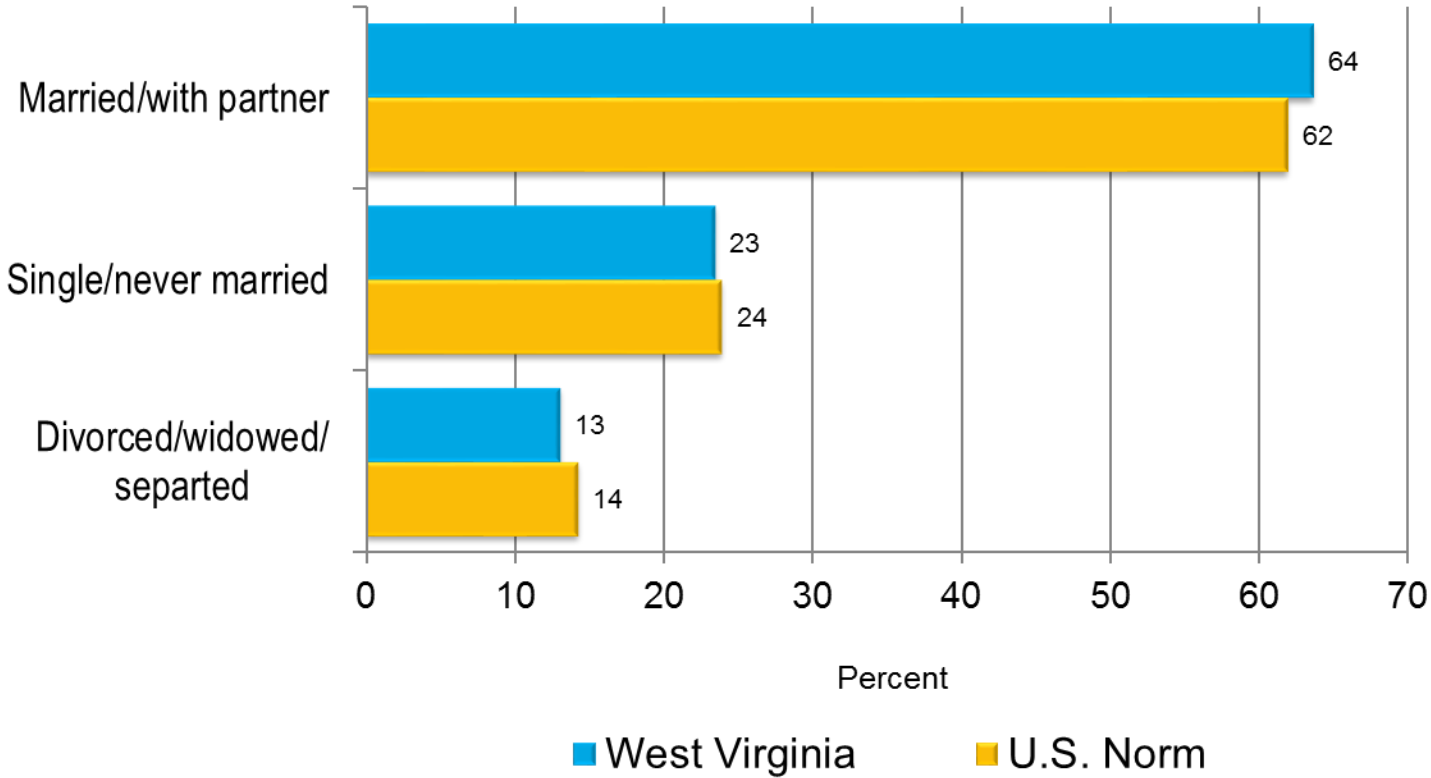
Average U.S. Norm = 44.9



Marital Status



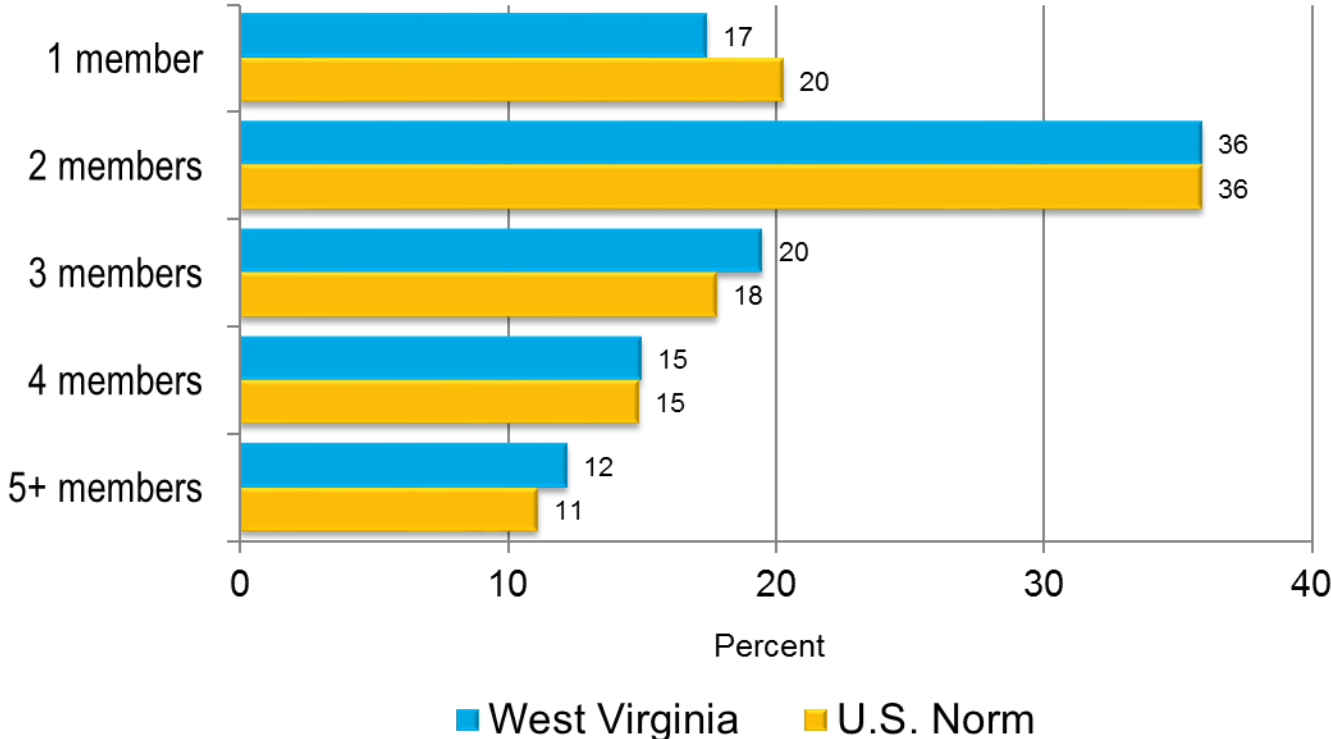
Base: Total Overnight Person-Trips



Household Size



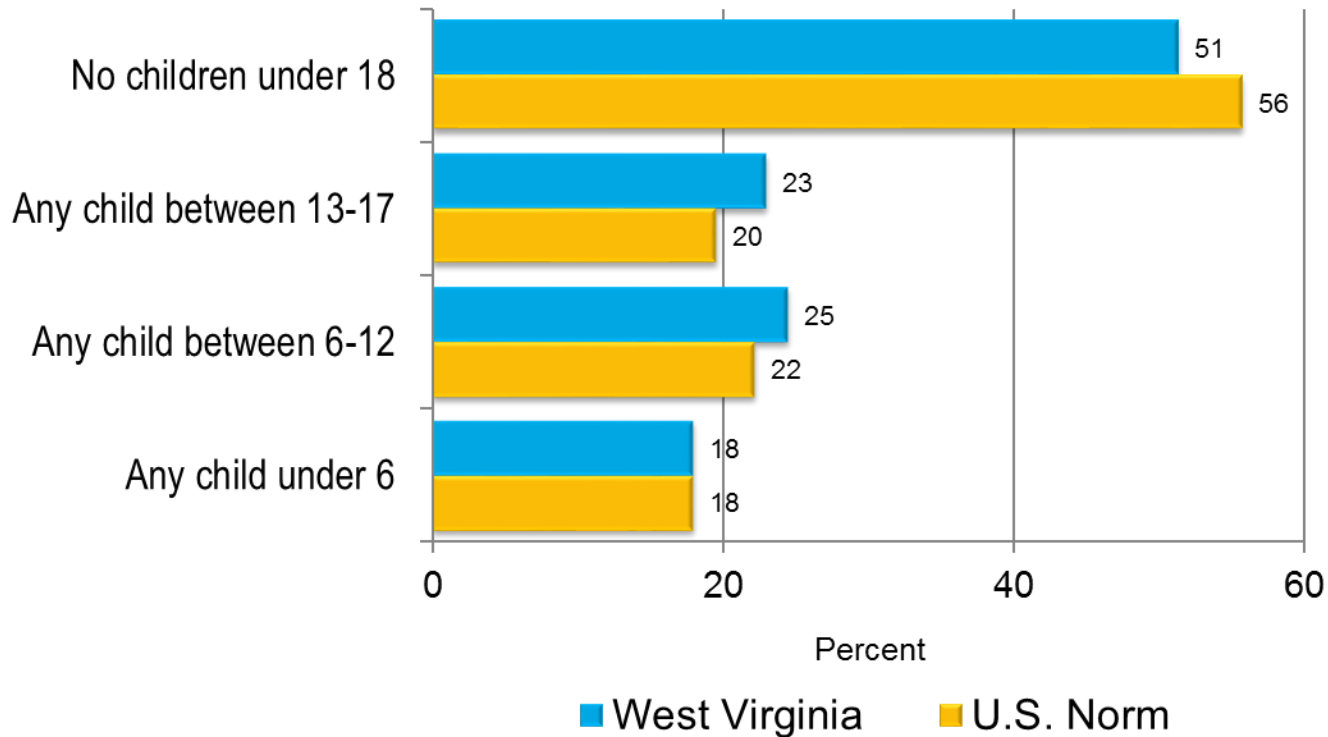
Base: Total Overnight Person-Trips



Children in Household



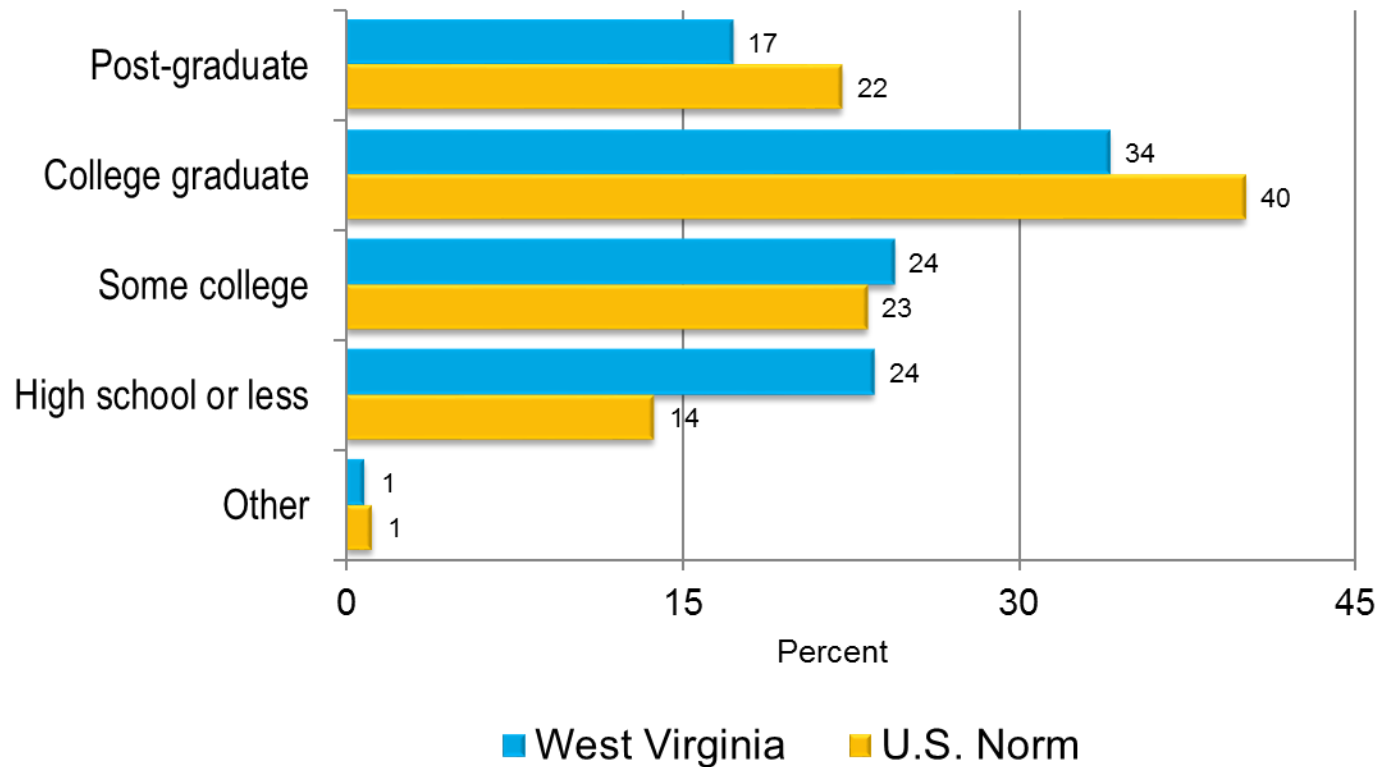
Base: Total Overnight Person Trips



Education



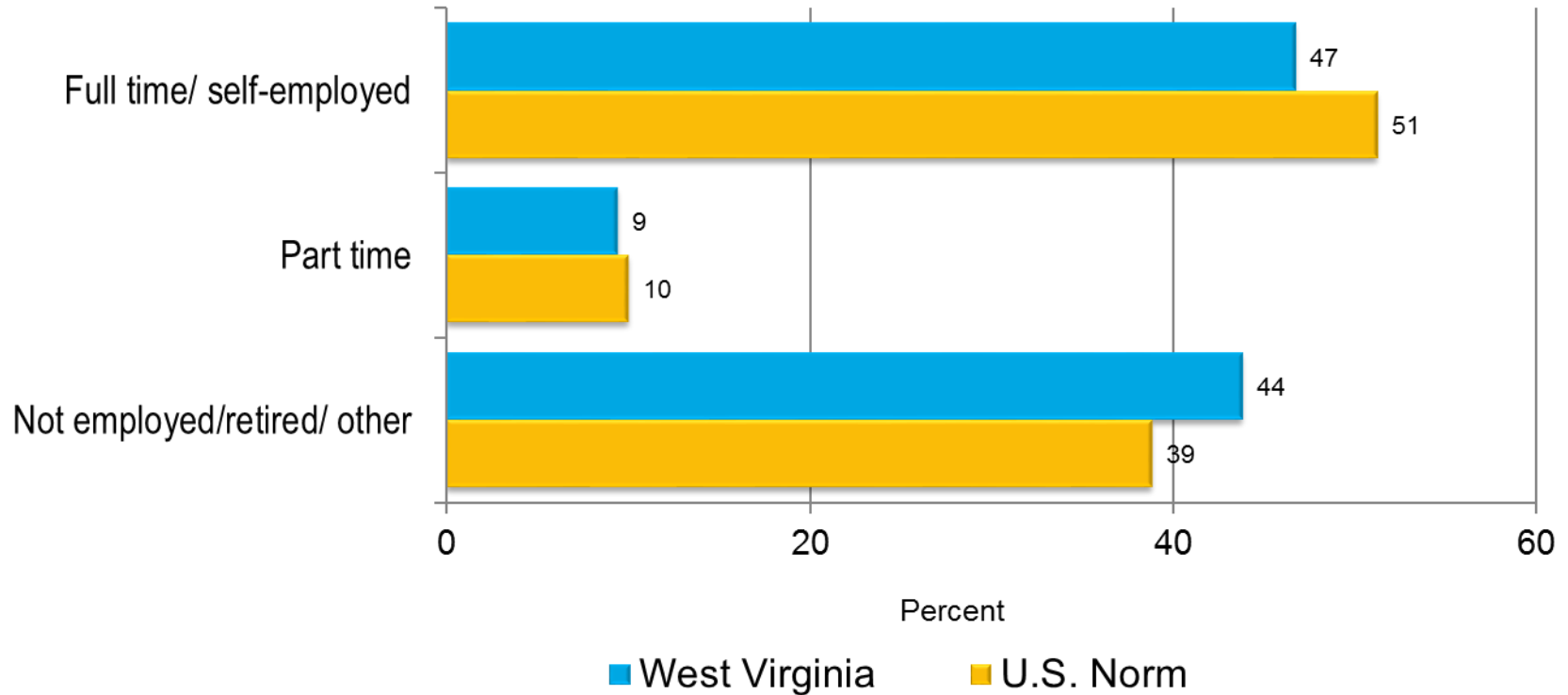
Base: Total Overnight Person-Trips



Employment



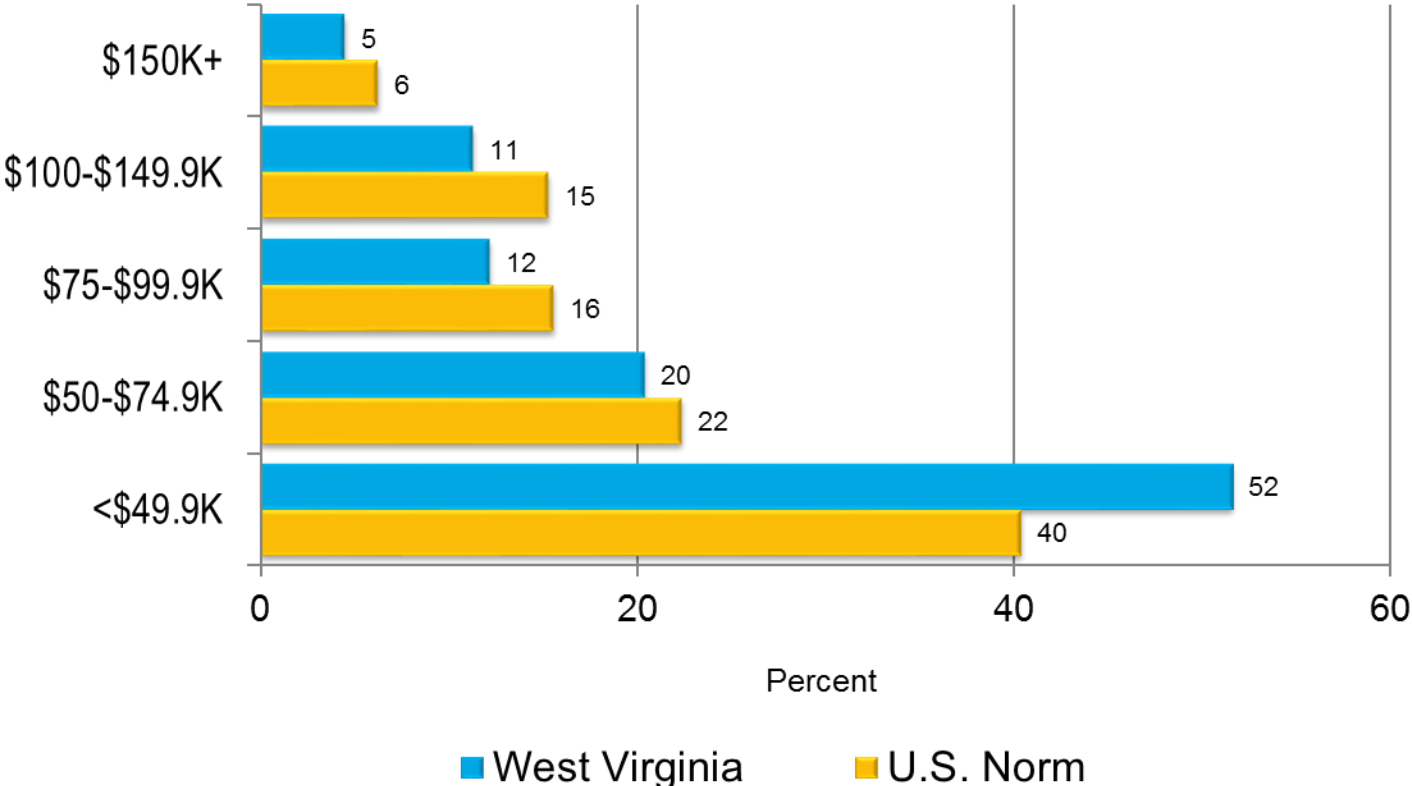
Base: Total Overnight Person-Trips



Household Income



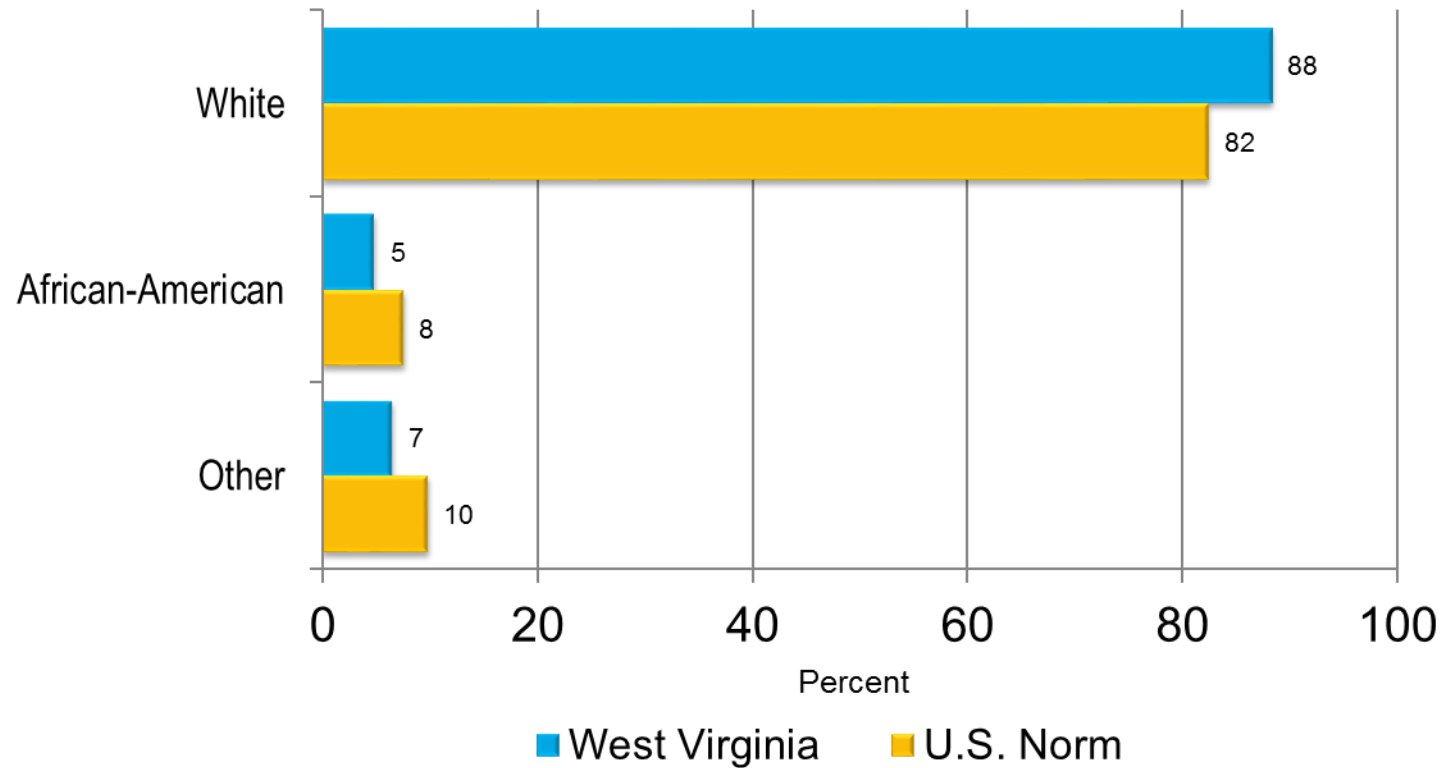
Base: Total Overnight Person-Trips



Race



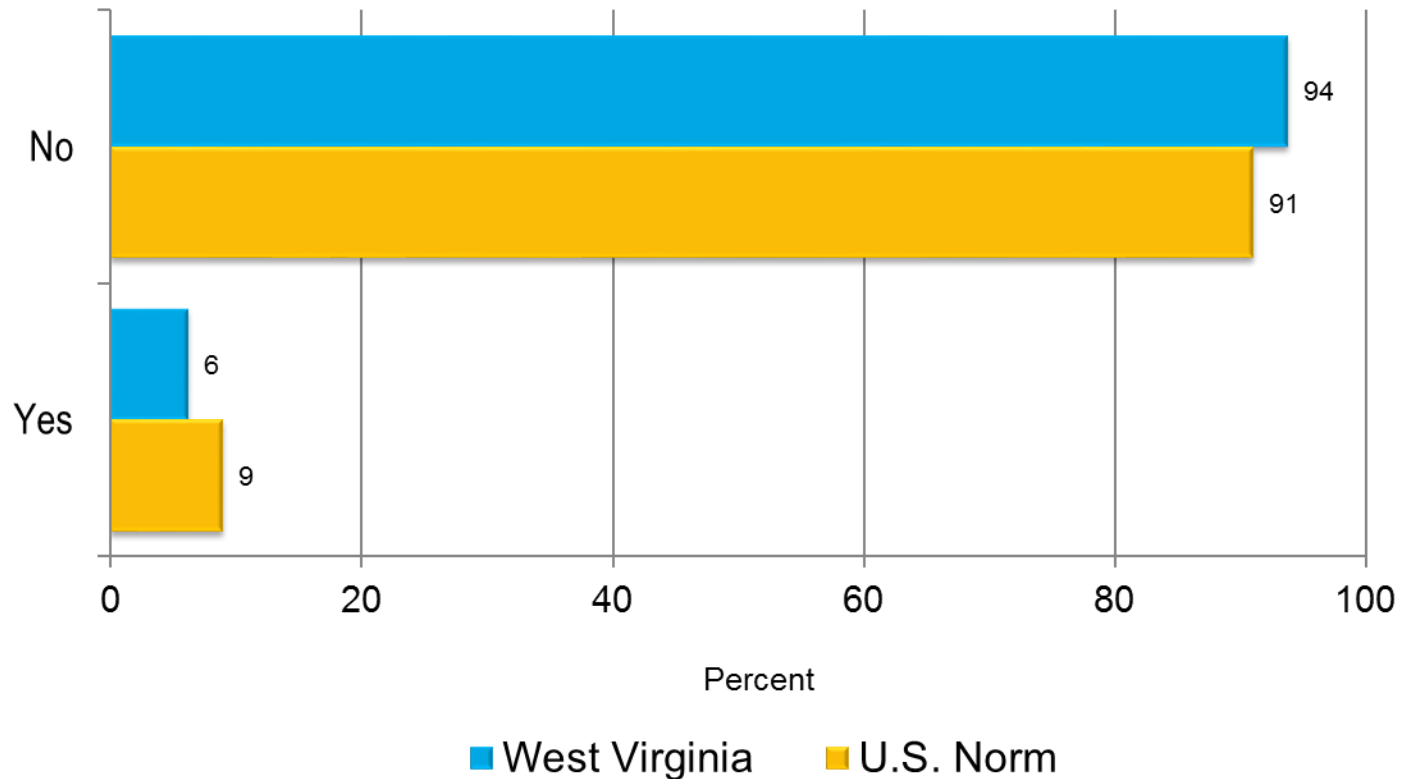
Base: Total Overnight Person-Trips



Hispanic Background



Base: Total Overnight Person-Trips





Appendix

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - *Visiting friends/relatives*
 - *Touring through a region to experience its scenic beauty, history and culture*
 - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - *Special event, such as a fair, festival, or sports event*
 - *City trip*
 - *Cruise*
 - *Casino*
 - *Theme park*
 - *Resort (ocean beach, inland or mountain resort)*
 - *Skiing/snowboarding*
 - *Golf*
- **Business Trips:**
 - *Conference/convention*
 - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:
Include all leisure trips, with the exception of visits to friends/relatives