



WEST
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West Virginia 2017 Visitor Research



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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 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 2017.

Research Objectives

- ✓ The visitor research program is designed to provide:
 - ✓ Estimates of domestic overnight and day visitor volumes to West Virginia.
 - ✓ A profile of West Virginia's performance within its overnight travel market.
 - ✓ Domestic visitor expenditures in West Virginia.
 - ✓ Profiles of West Virginia's day travel market.
 - ✓ 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 2017 travel year, this yielded :
 - 329,470 trips for analysis nationally:
 - 232,317 overnight trips
 - 97,153 day trips
- For West Virginia, the following sample was achieved in 2017:
 - 2,549 trips:
 - 1,495 overnight trips
 - 1,054 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings



Key Findings

- In 2017, West Virginia had 62.3 million person trips, increasing 1.4% from 2015. 25% were overnight trips and 75% were day trips.
- The overnight trips generated \$2.45 billion in spending, decreasing 1.8% from 2015.
- When asked about the main purpose of their overnight trip, 45% responded that they were visiting friends and relatives, while 42% said they were on marketable trips. Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip type was touring through the region.
- The top three states of origin for visitors on overnight trips to West Virginia were West Virginia, Ohio, and Virginia. Among DMAs, the top three overnight visitor sources were Washington DC, Charleston-Huntington, and Pittsburgh.

Key Findings (Cont'd)

- Three-quarters (75%) of visitors on an overnight trip to West Virginia were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were friendliness of the local people (73%) and quality of the accommodations (68%).
- Among those on overnight trips to West Virginia, 87% have visited West Virginia at least once before and 68% have visited in the past twelve months.
- Similar to the national average, over half (52%) of the overnight trips were planned 2 months or less before the trip. Greater than the national average, 21% did not plan anything in advance.
- Advice from relatives or friends, hotel or resorts, and social media were the most common planning sources for a West Virginia overnight trip. Hotels or resorts were the most common booking source.

Key Findings (Cont'd)

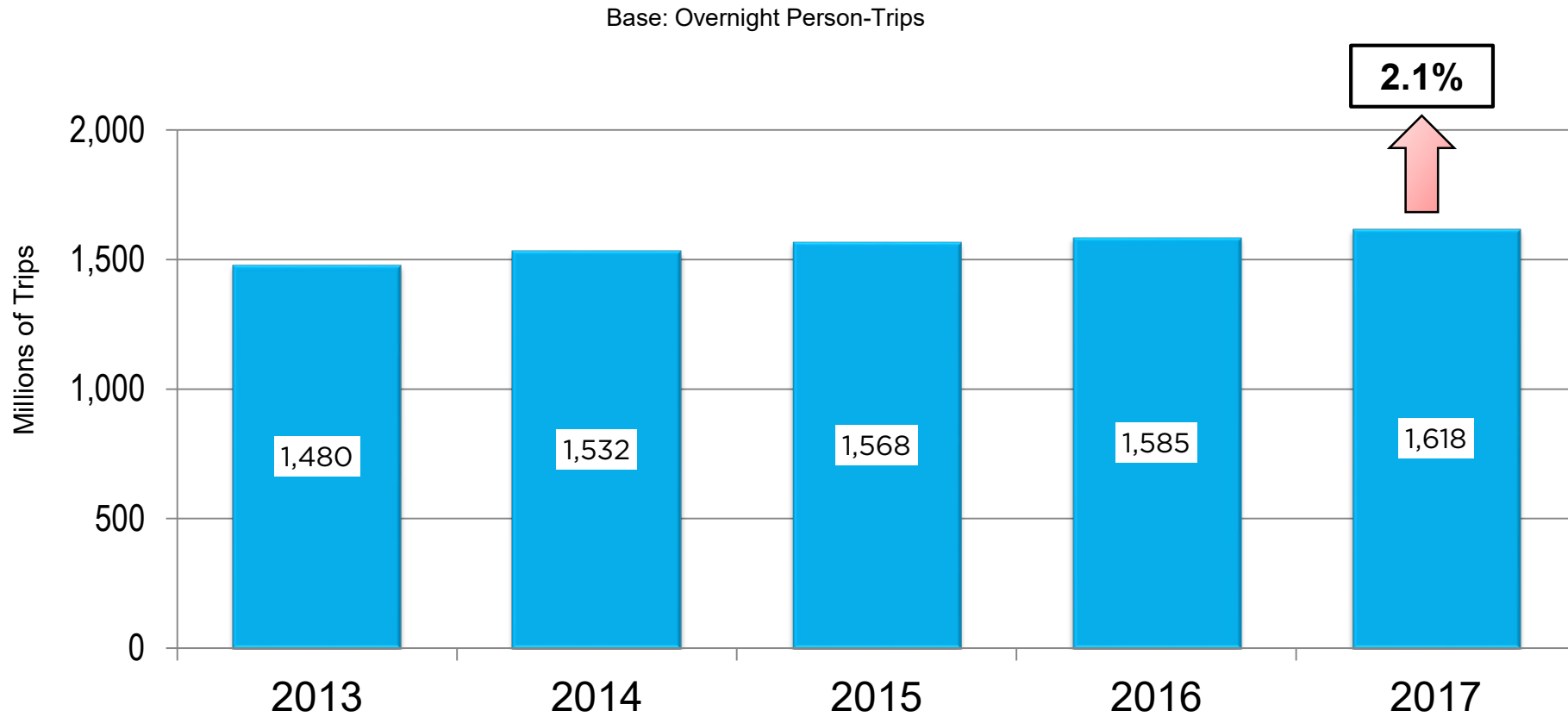
- The average number of nights spent in West Virginia on an overnight trip was 2.7 nights, the same as 2015. The average travel party size was 2.9 persons.
- Two-thirds (66%) of overnight visitors to West Virginia traveled with their spouse or partner, 38% with their children, and 22% traveled alone.
- Eighty-five percent (85%) of overnight West Virginia travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight trip to West Virginia were shopping, landmark/historic site visits, visiting a national/state park, fine dining, and hiking/backpacking.



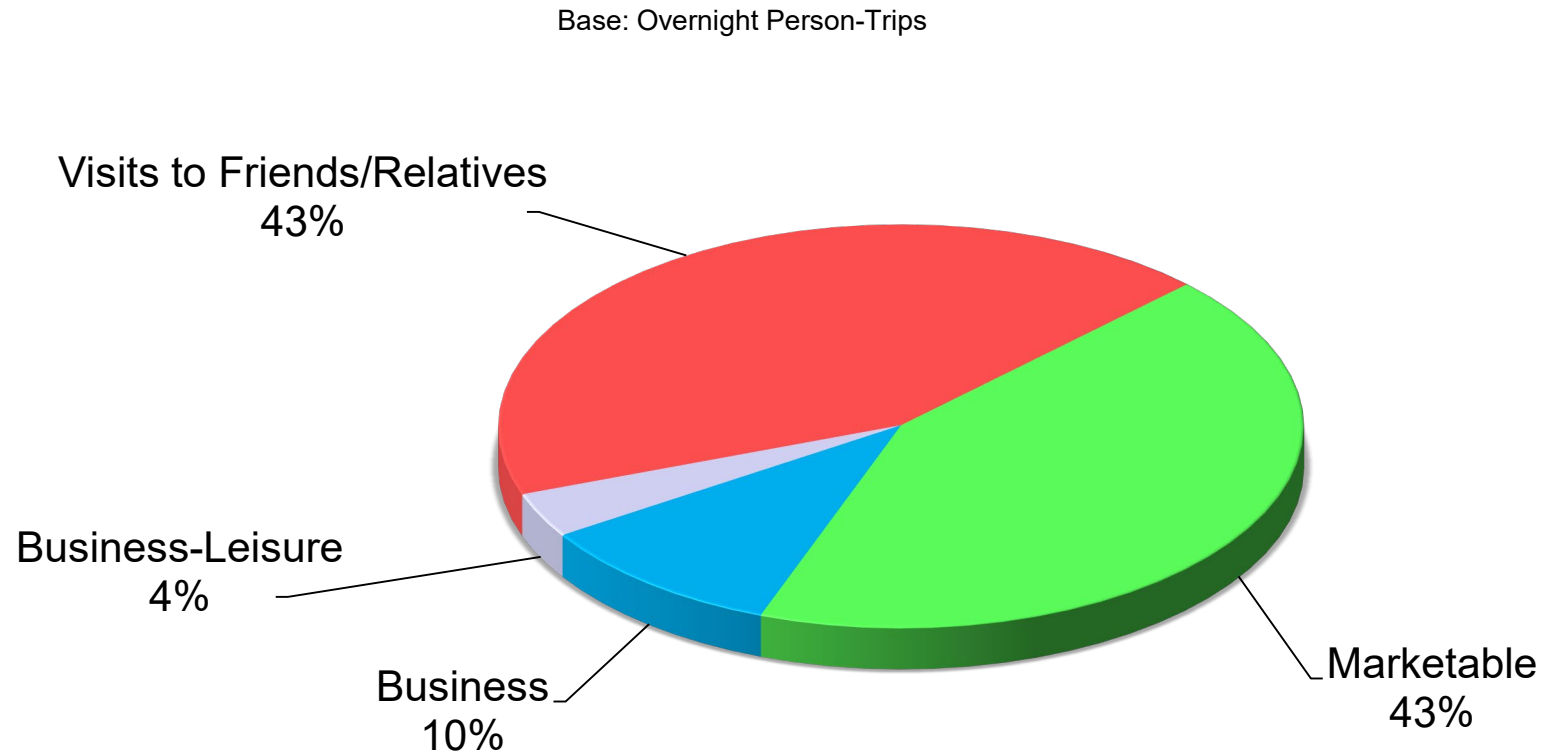
Size & Structure of the U.S. Travel Market



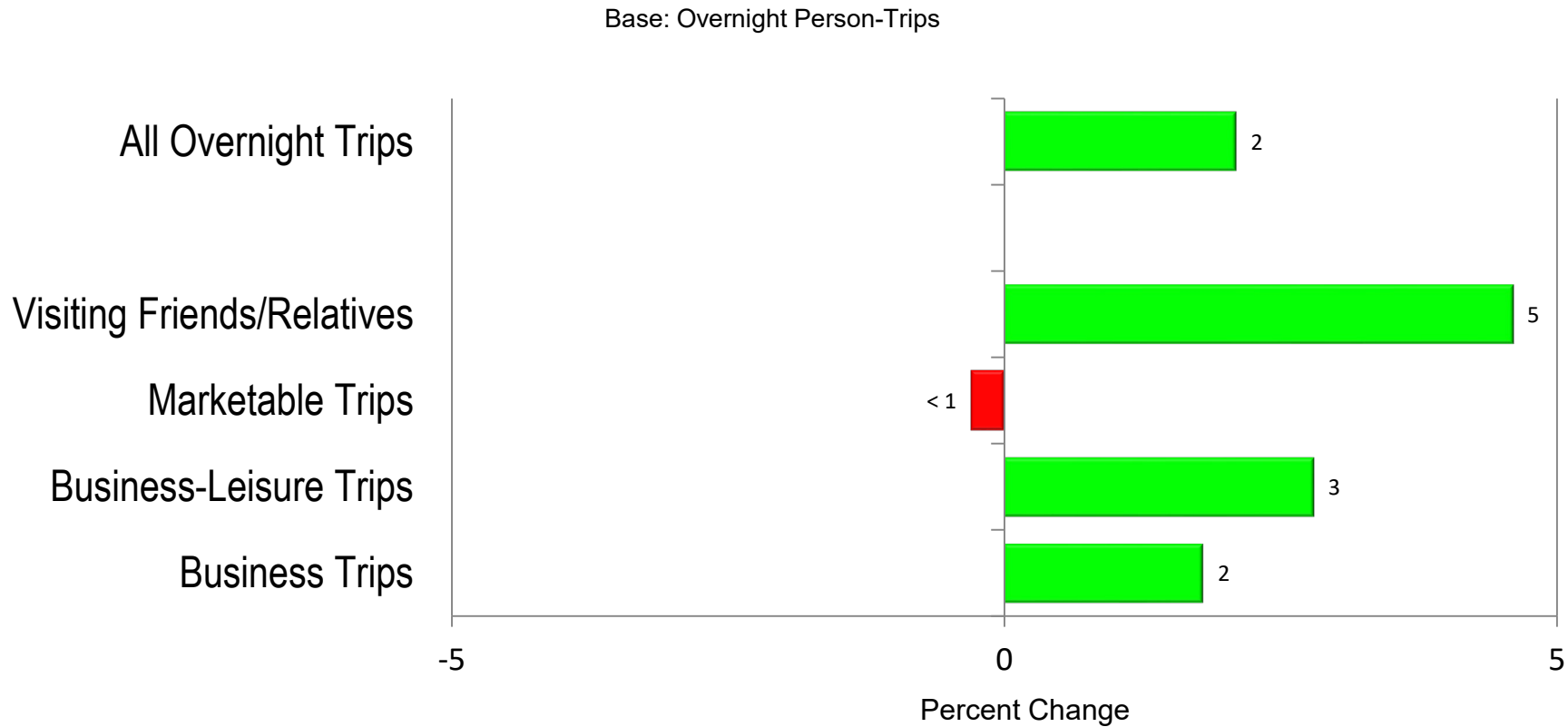
Total Size of the U.S. Travel Market — 2013-2017



Structure of the U.S. Travel Market — 2017 Overnight Trips



U.S. Market Trends for Overnight Trips — 2017 vs. 2015





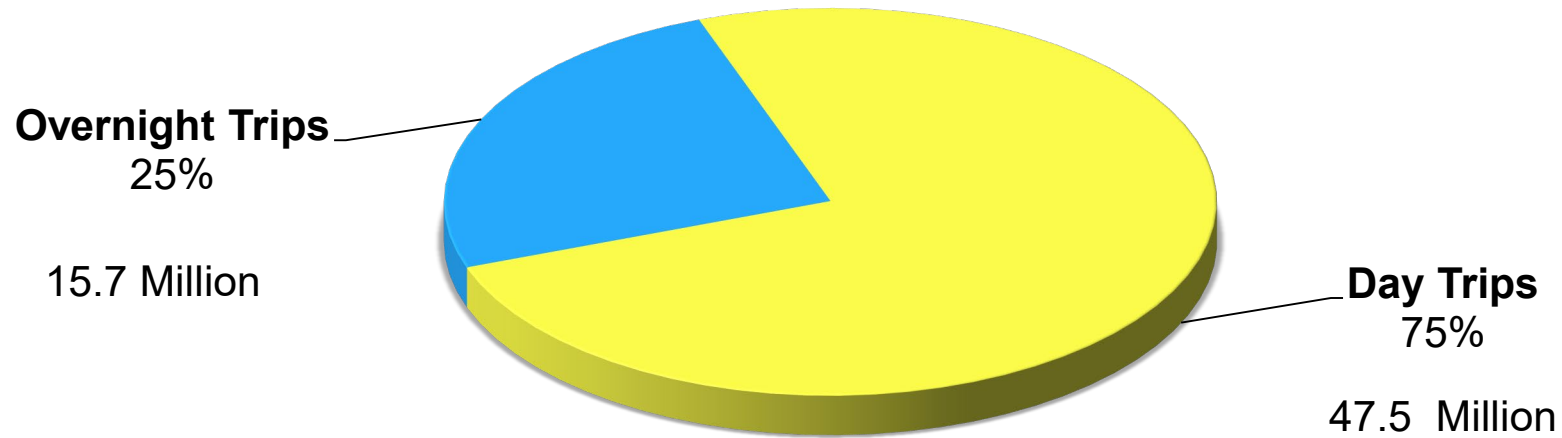
Size & Structure of West Virginia Domestic Travel Market



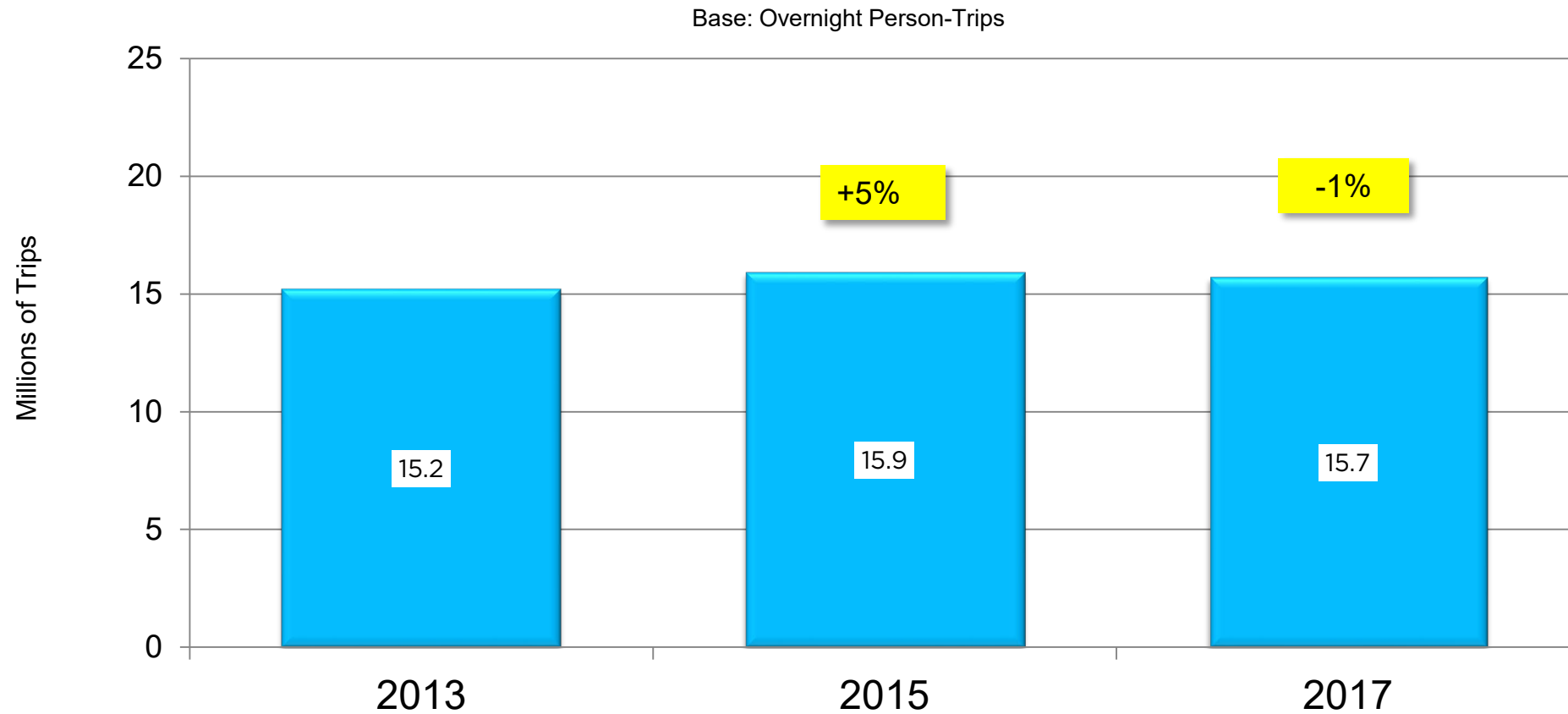
Total Size of West Virginia 2017 Domestic Travel Market

Total Person-Trips = 63.2 Million

+1.4% vs. 2015

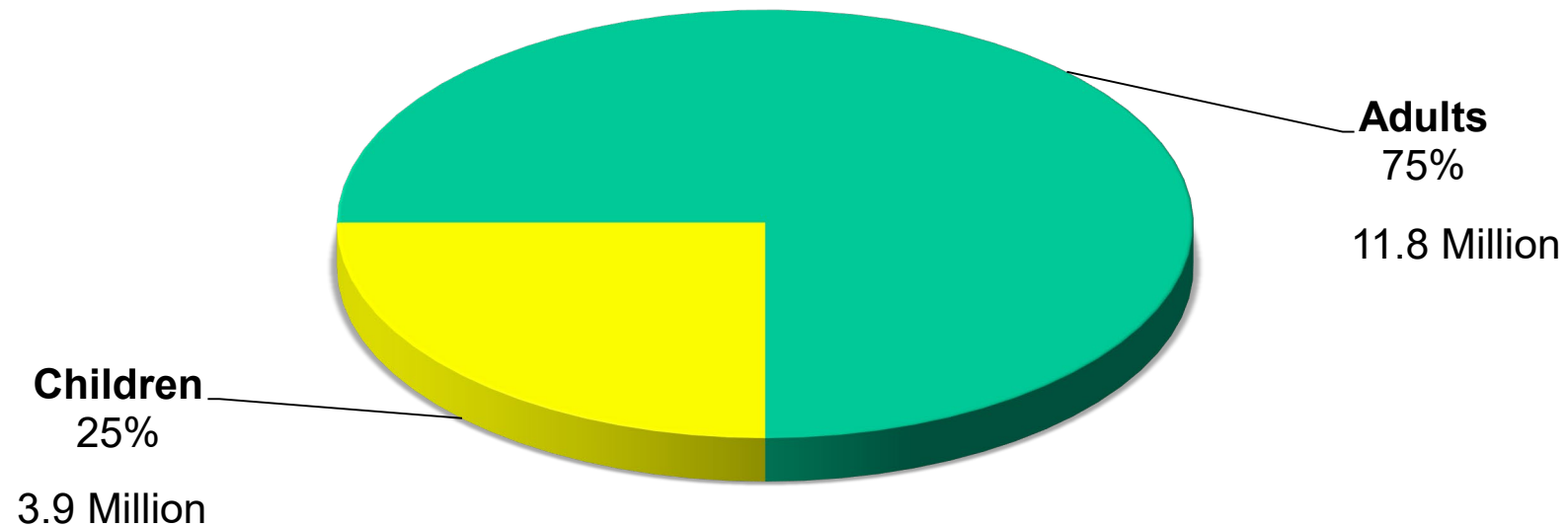


Overnight Trips to West Virginia



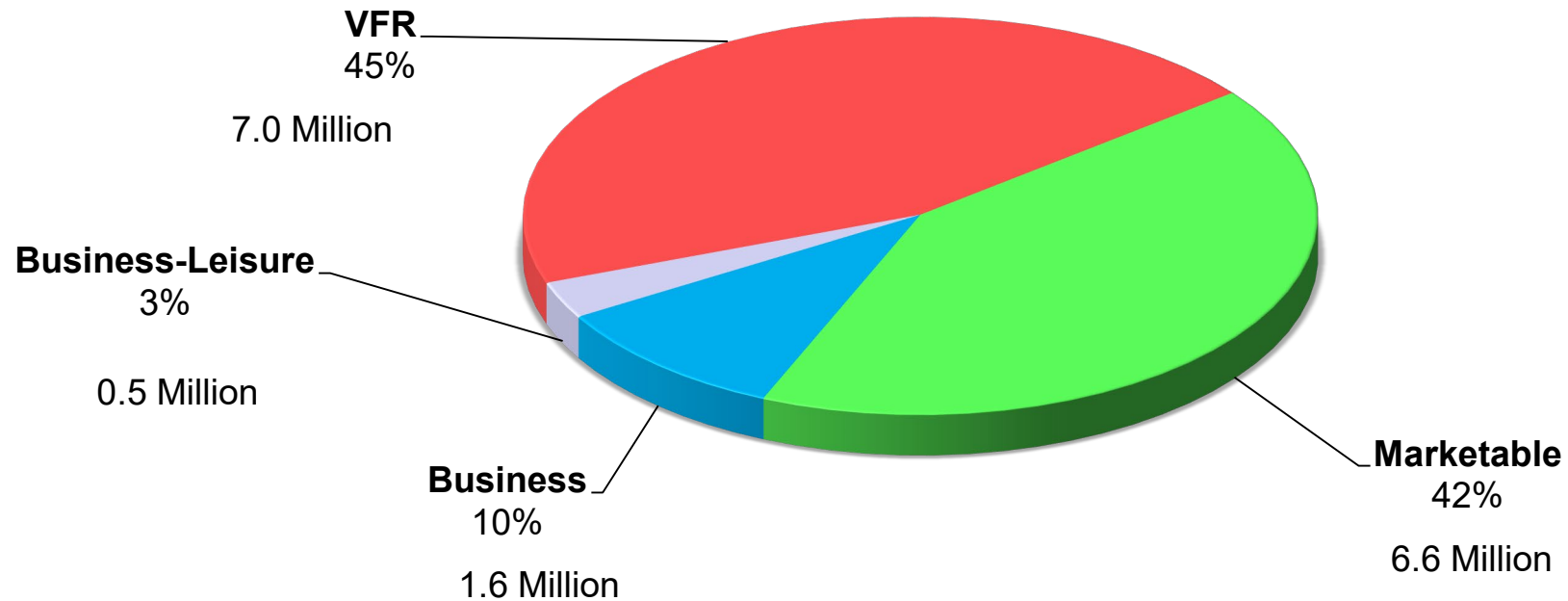
Size of West Virginia Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 15.7 Million



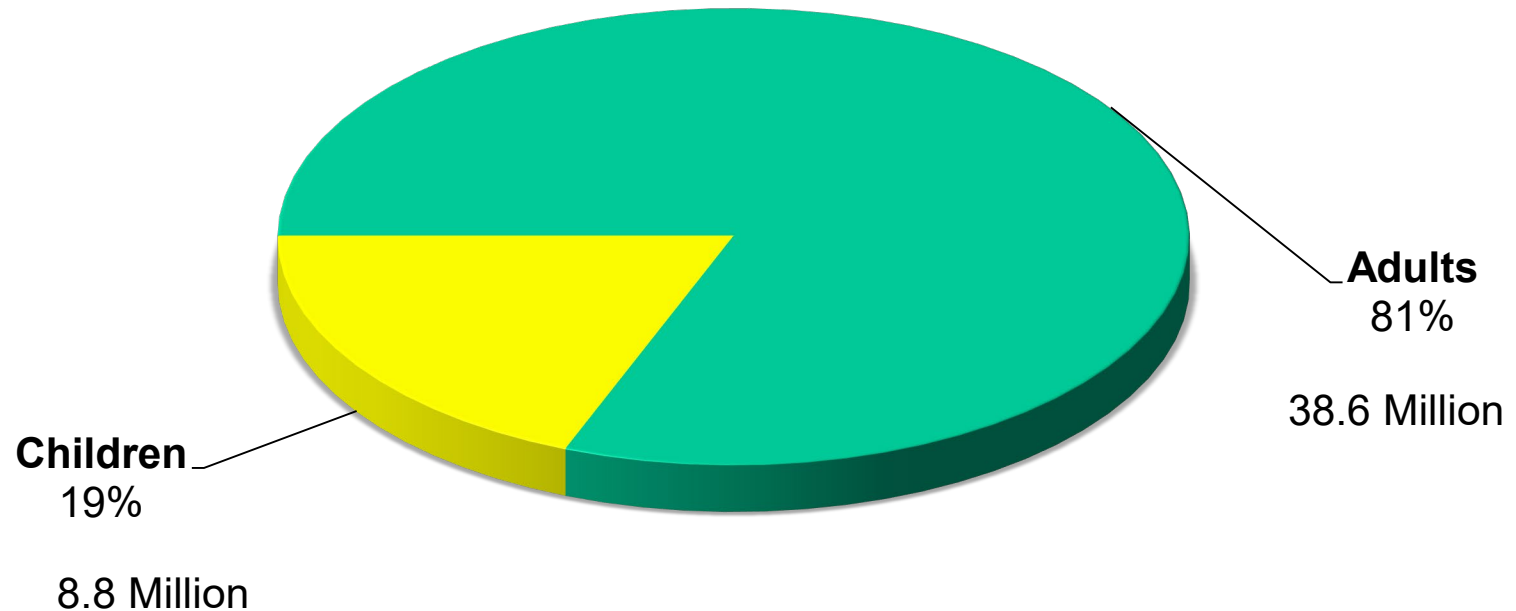
West Virginia Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 15.7 Million



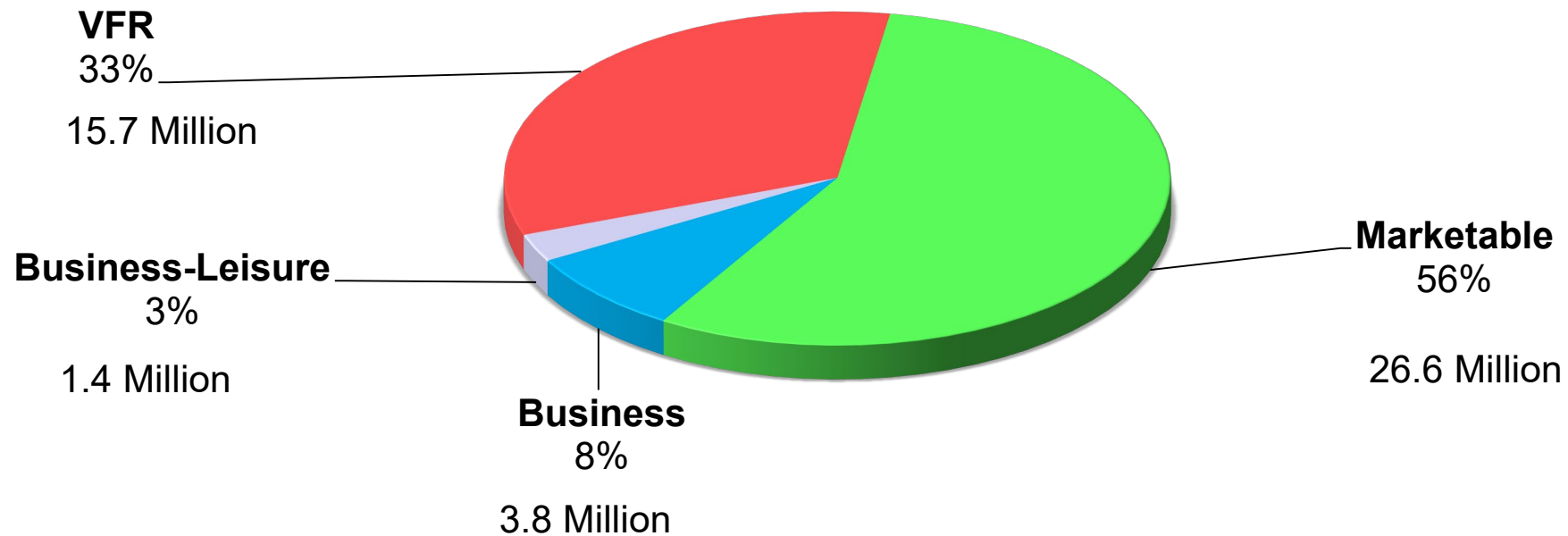
Size of West Virginia Day Travel Market — Adults vs. Children

Total Day Person-Trips = 47.5 Million



West Virginia Day Travel Market — by Trip Purpose

Total Day Person-Trips = 47.5 Million



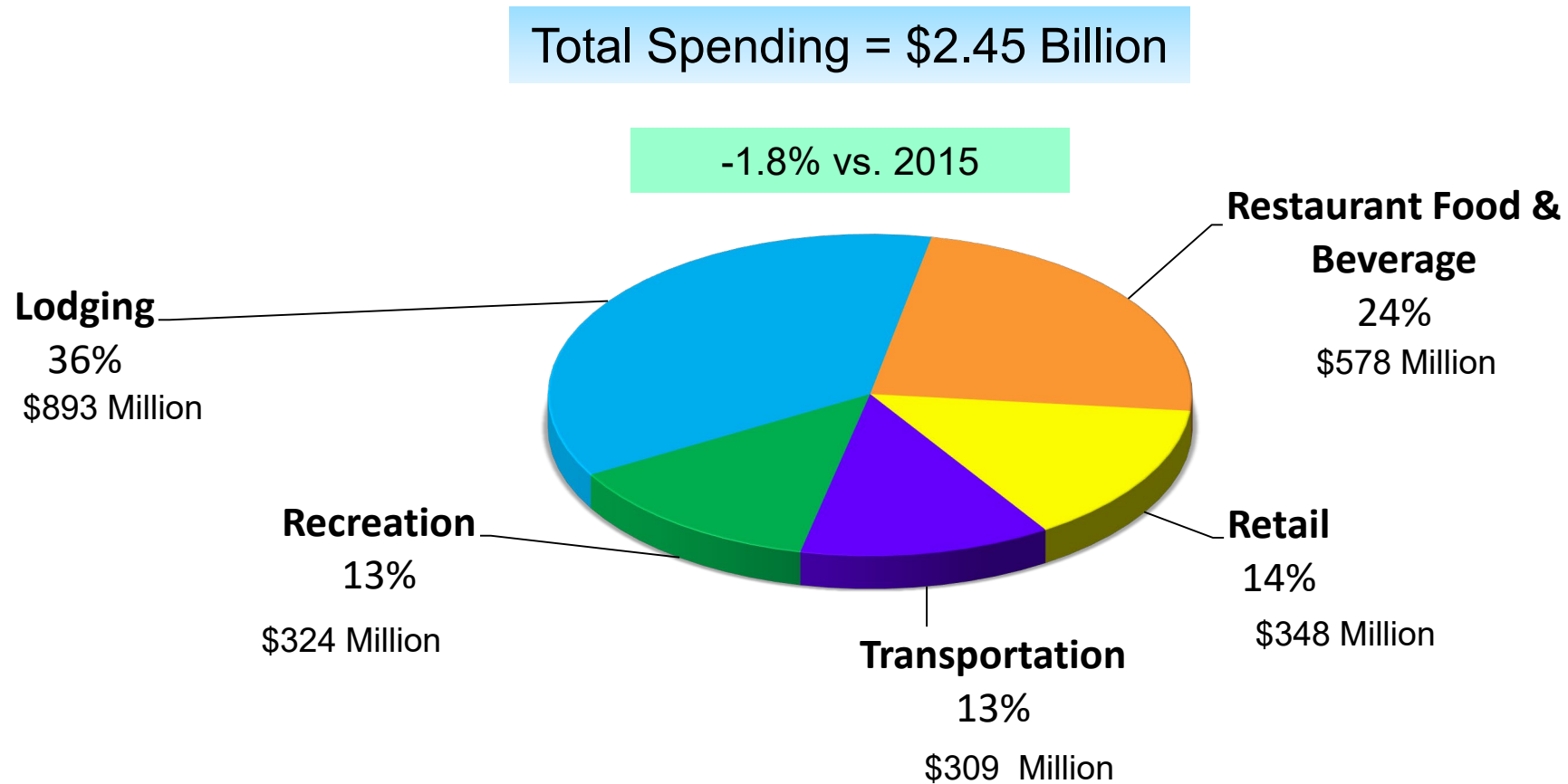


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Overnight Trip Expenditures



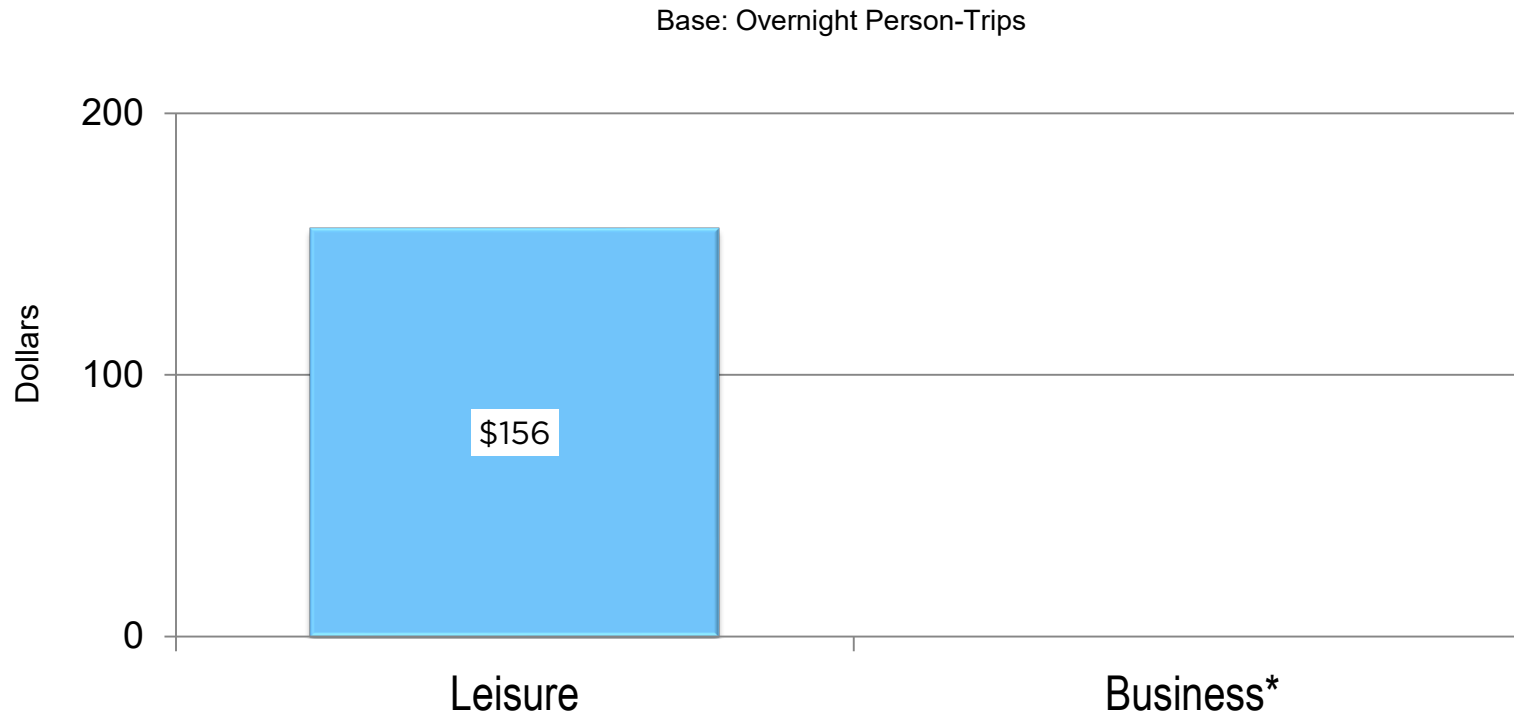
Domestic Overnight Expenditures — by Sector



Average Per Person Expenditures on Domestic Overnight Trips — By Sector

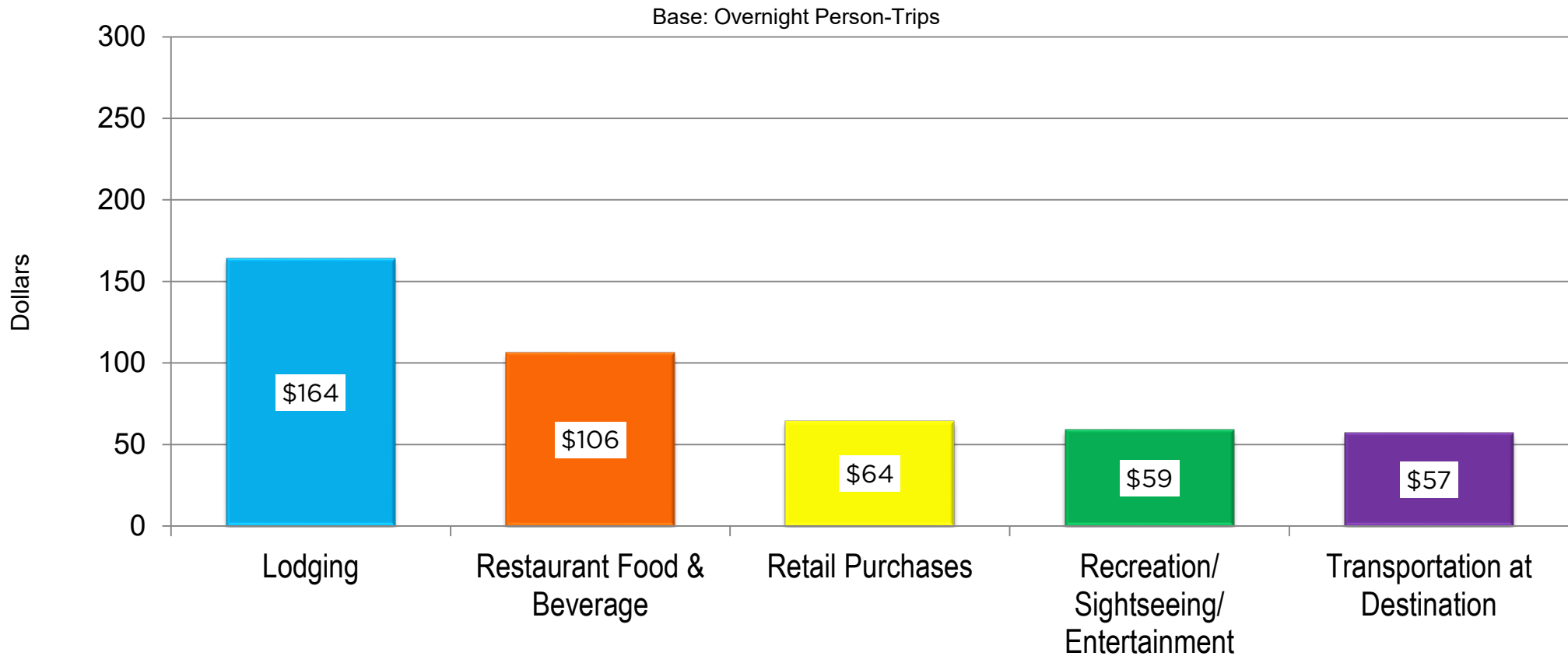


Average Per Person Expenditures on Domestic Overnight Trips — by Trip Purpose

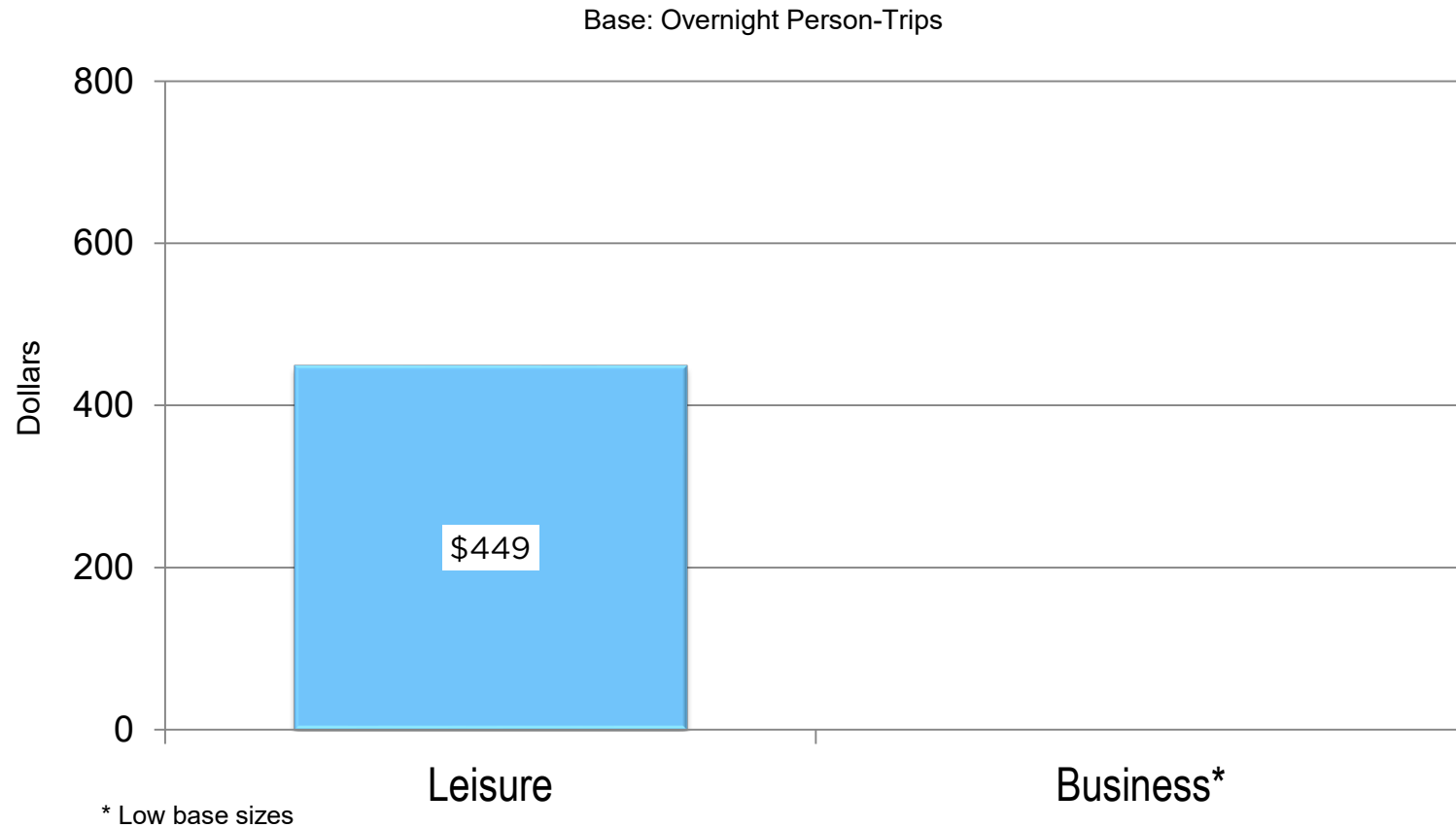


* Low base sizes

Average Per Party Expenditures on Domestic Overnight Trips — By Sector



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



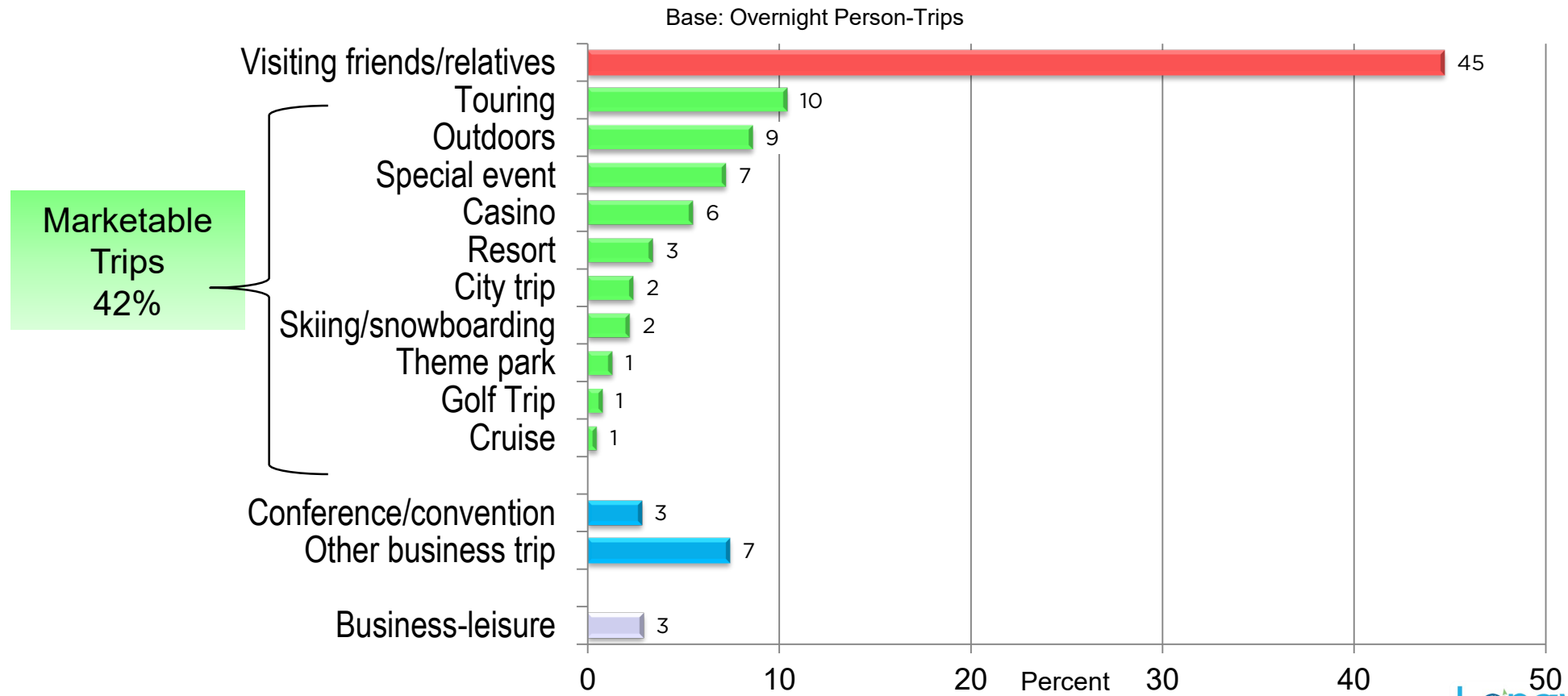


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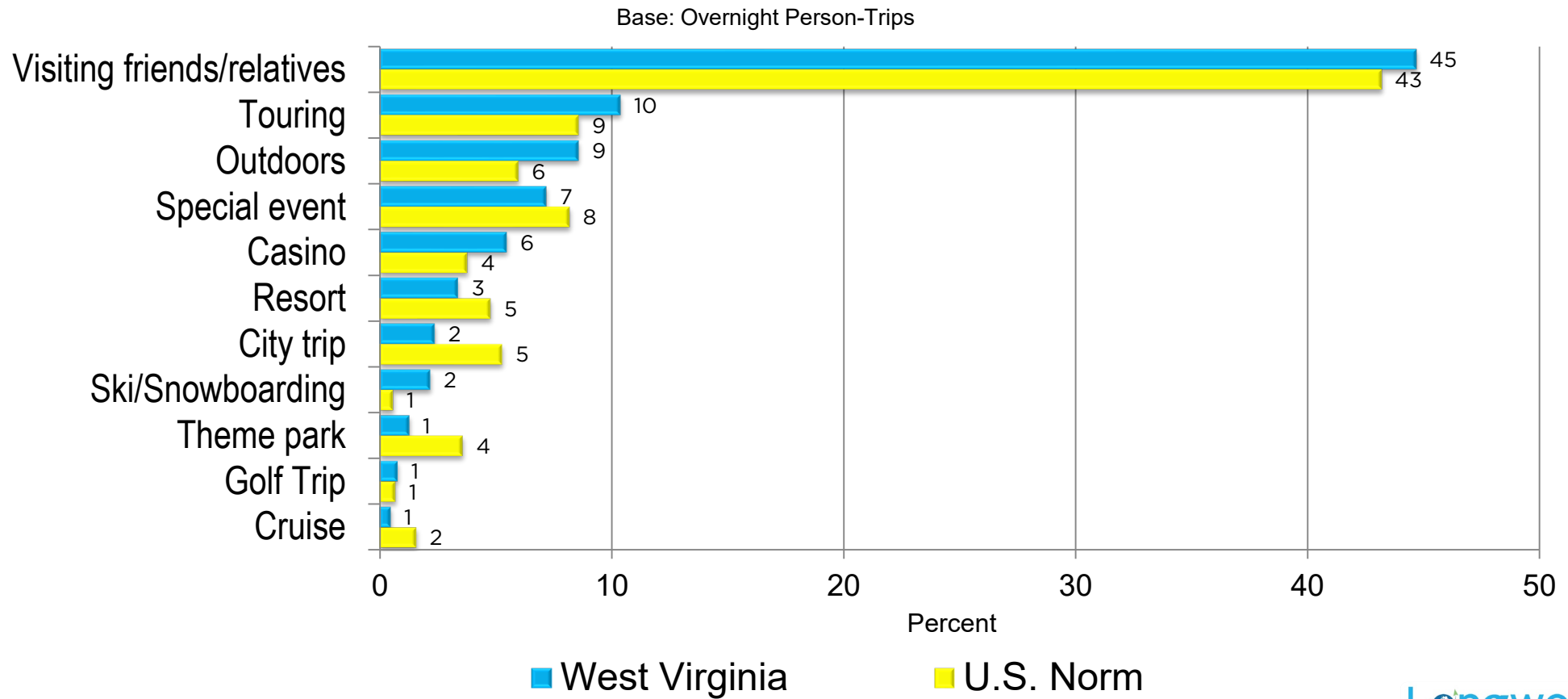
Overnight Trip Characteristics



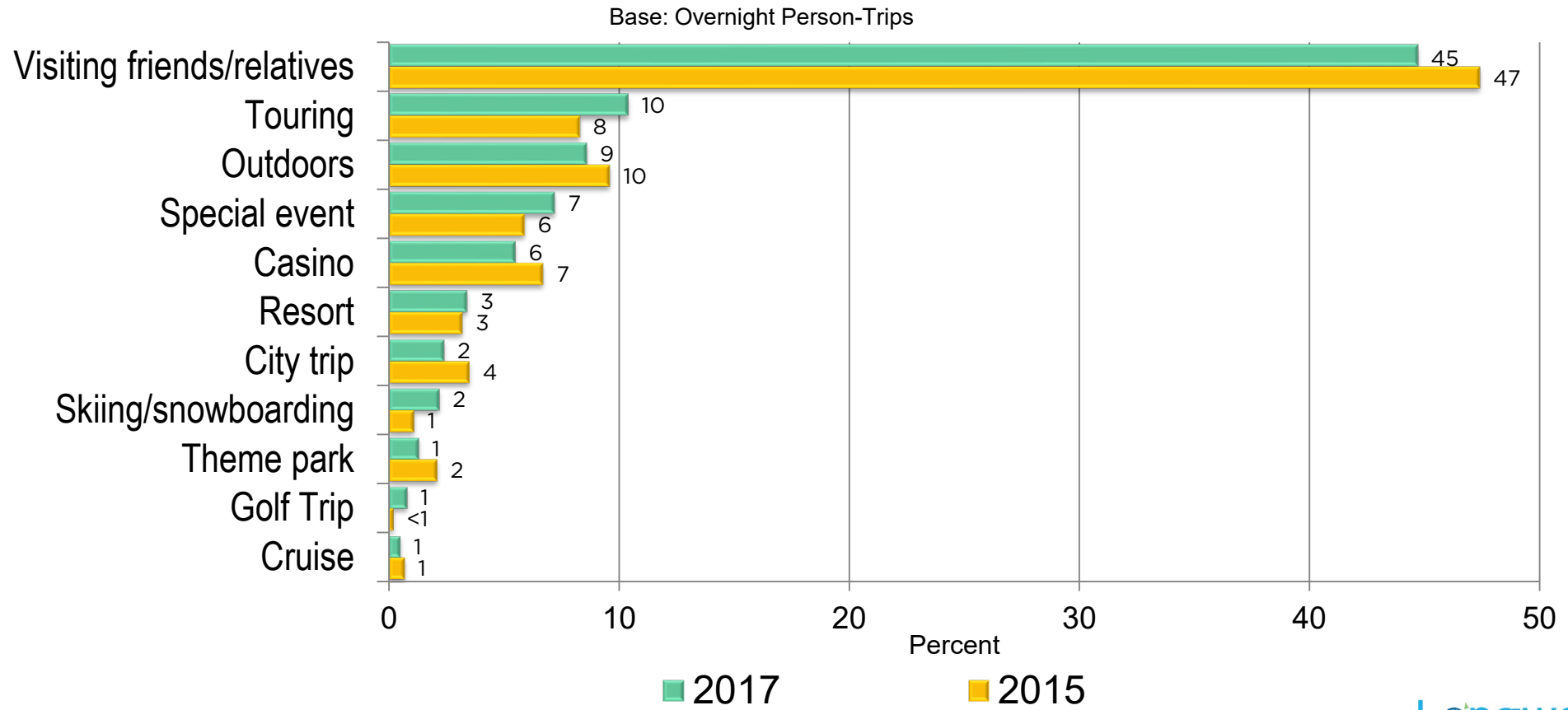
Main Purpose of Trip



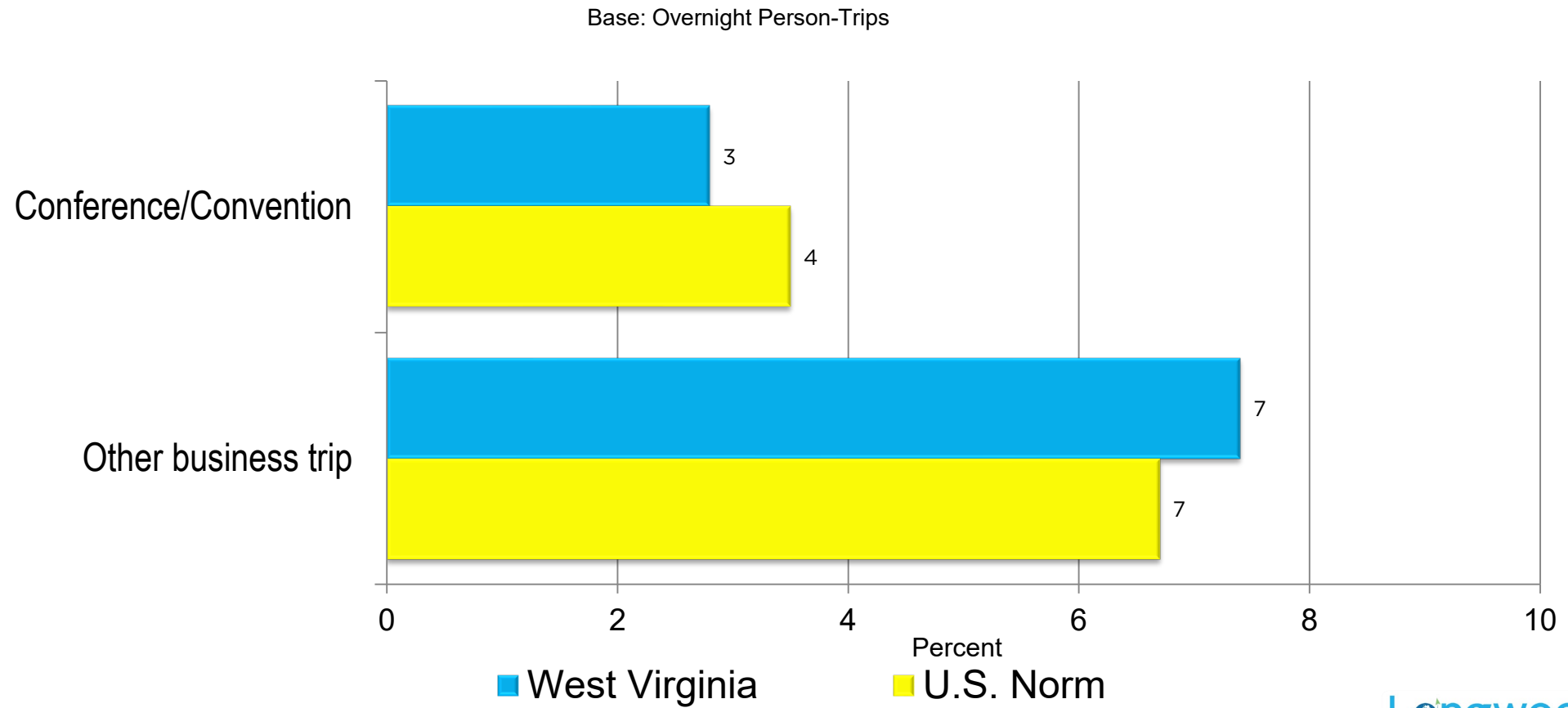
Main Purpose of Leisure Trip



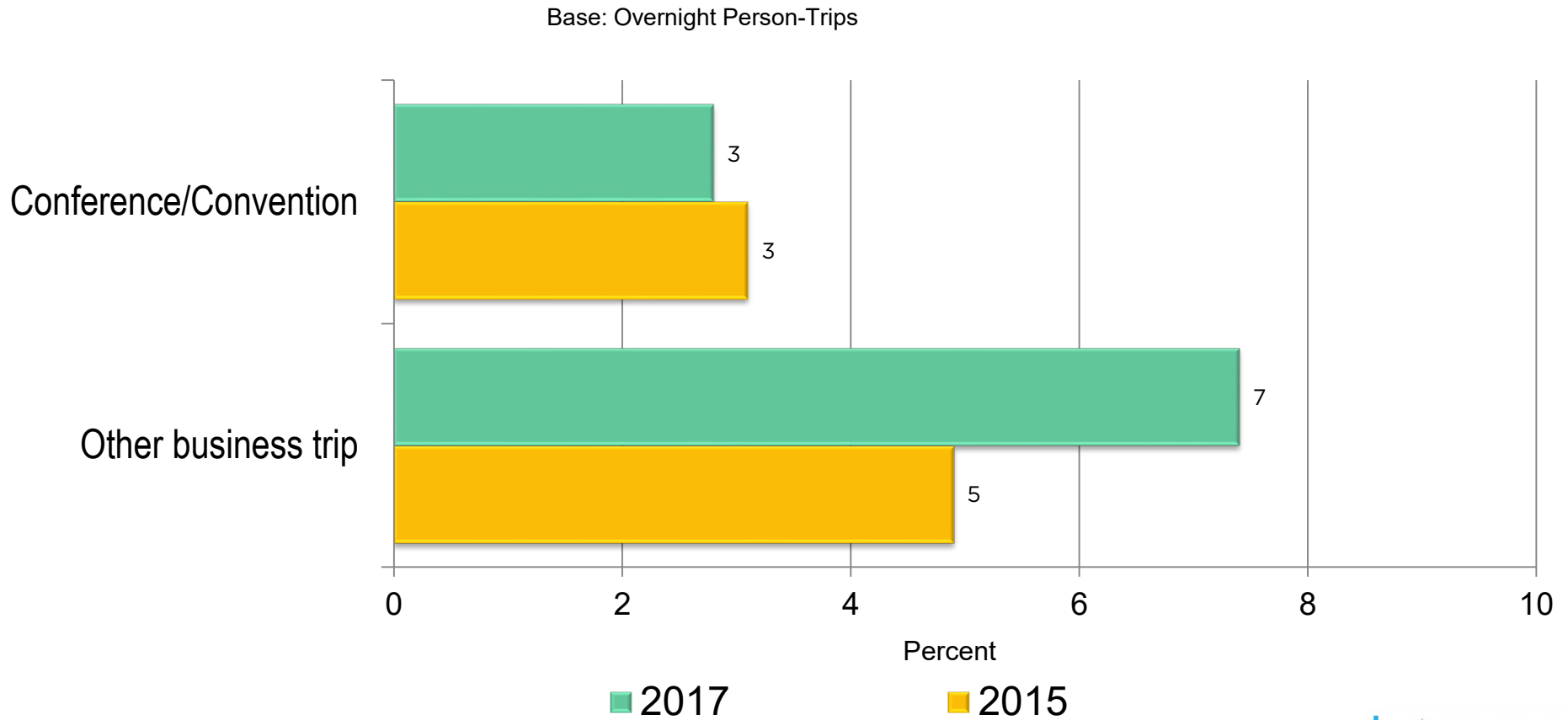
Main Purpose of Overnight Leisure Trip — 2017 vs. 2015



Main Purpose of Business Trip

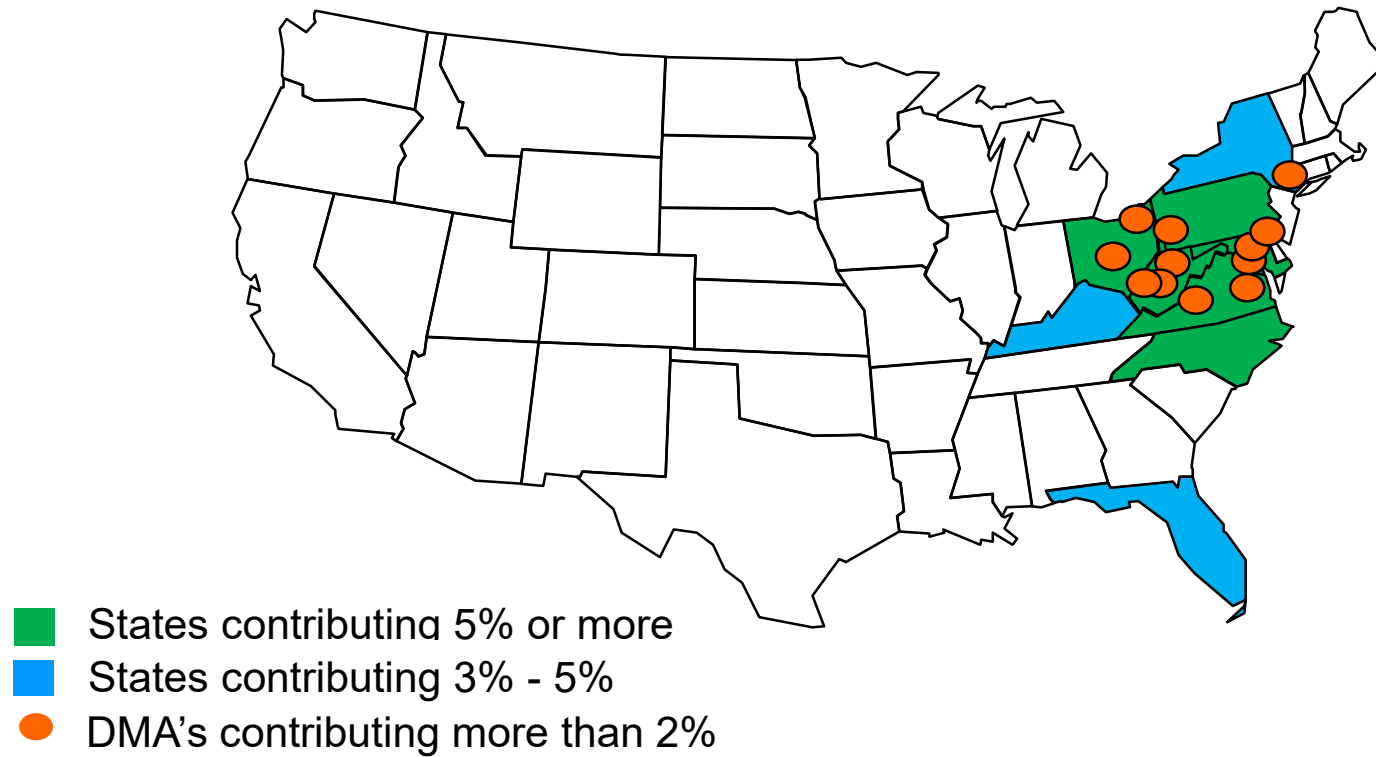


Main Purpose of Overnight Business Trip — 2017 vs. 2015

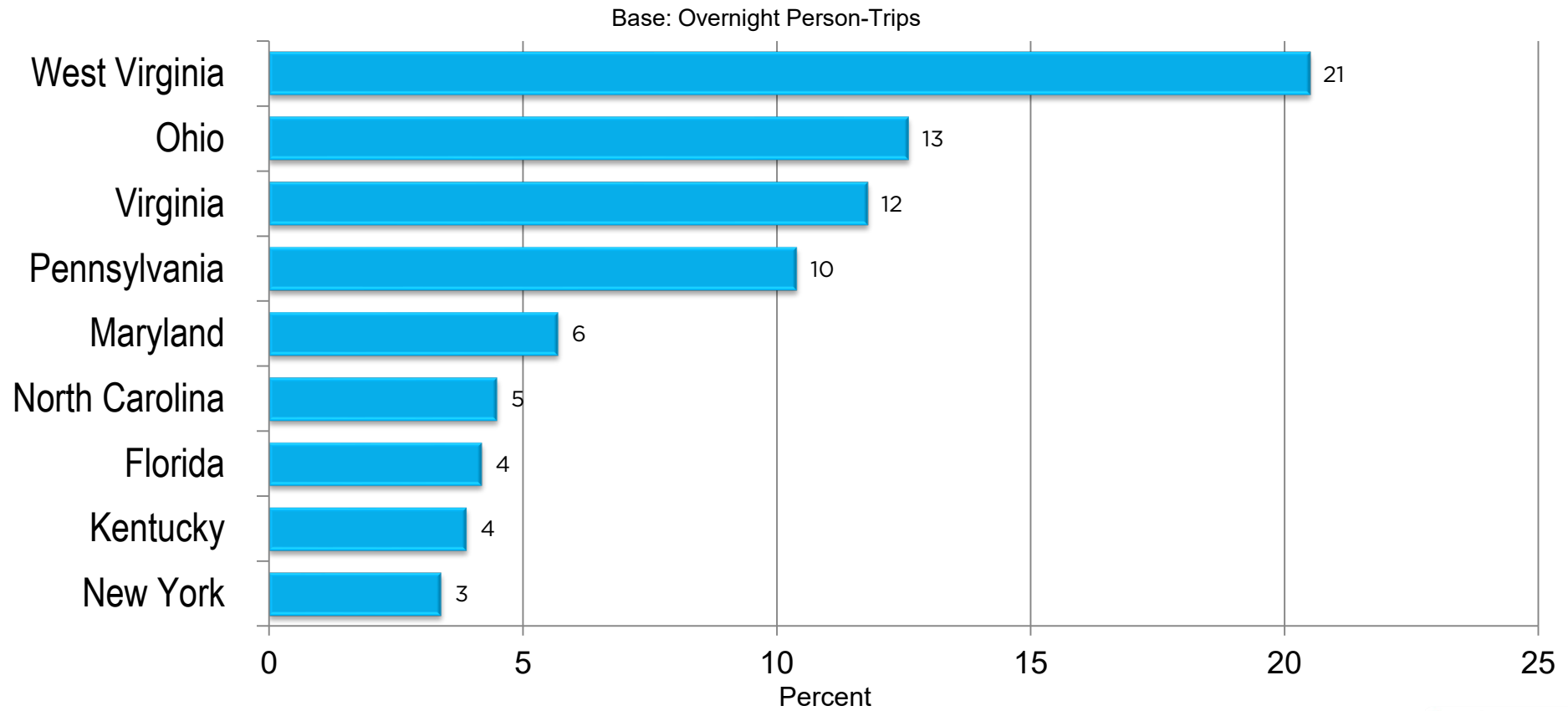


Sources of Business

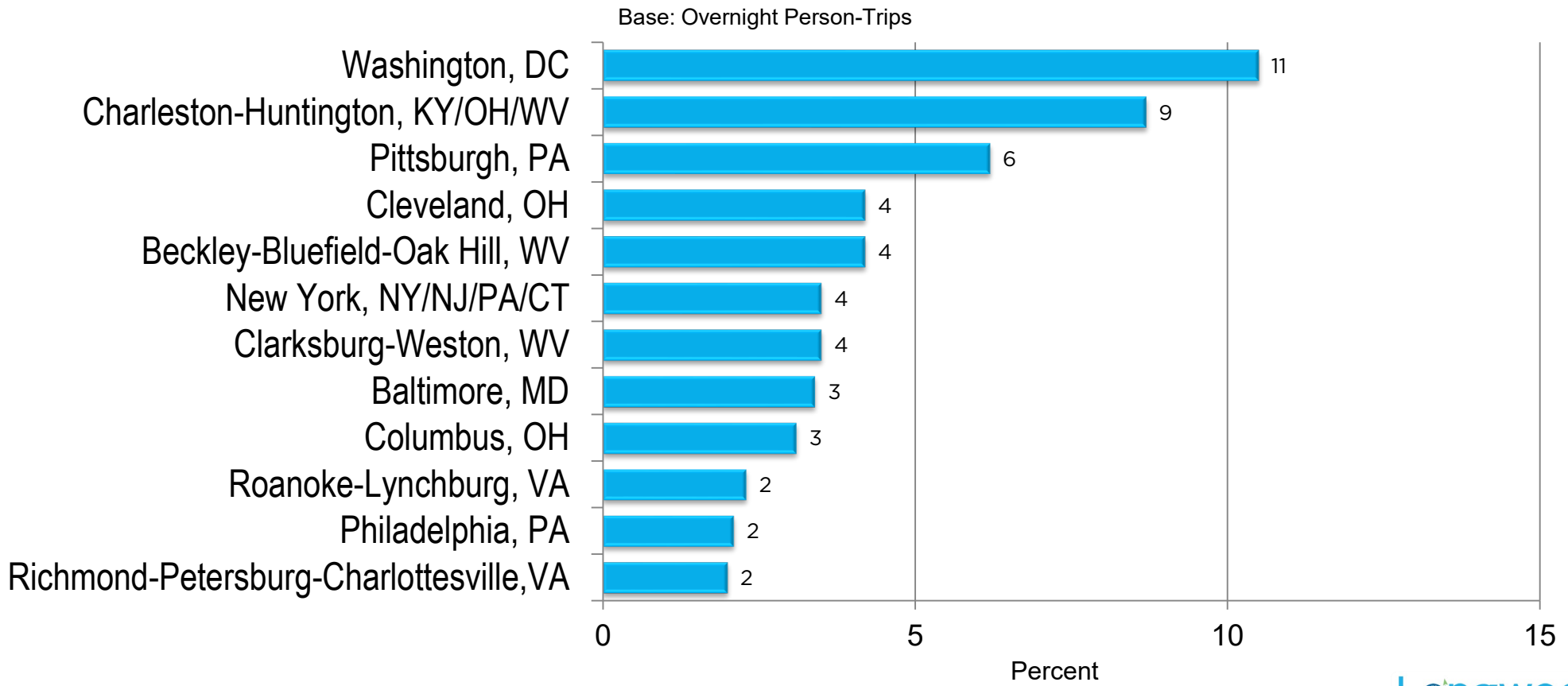
Base: Overnight Person-Trips



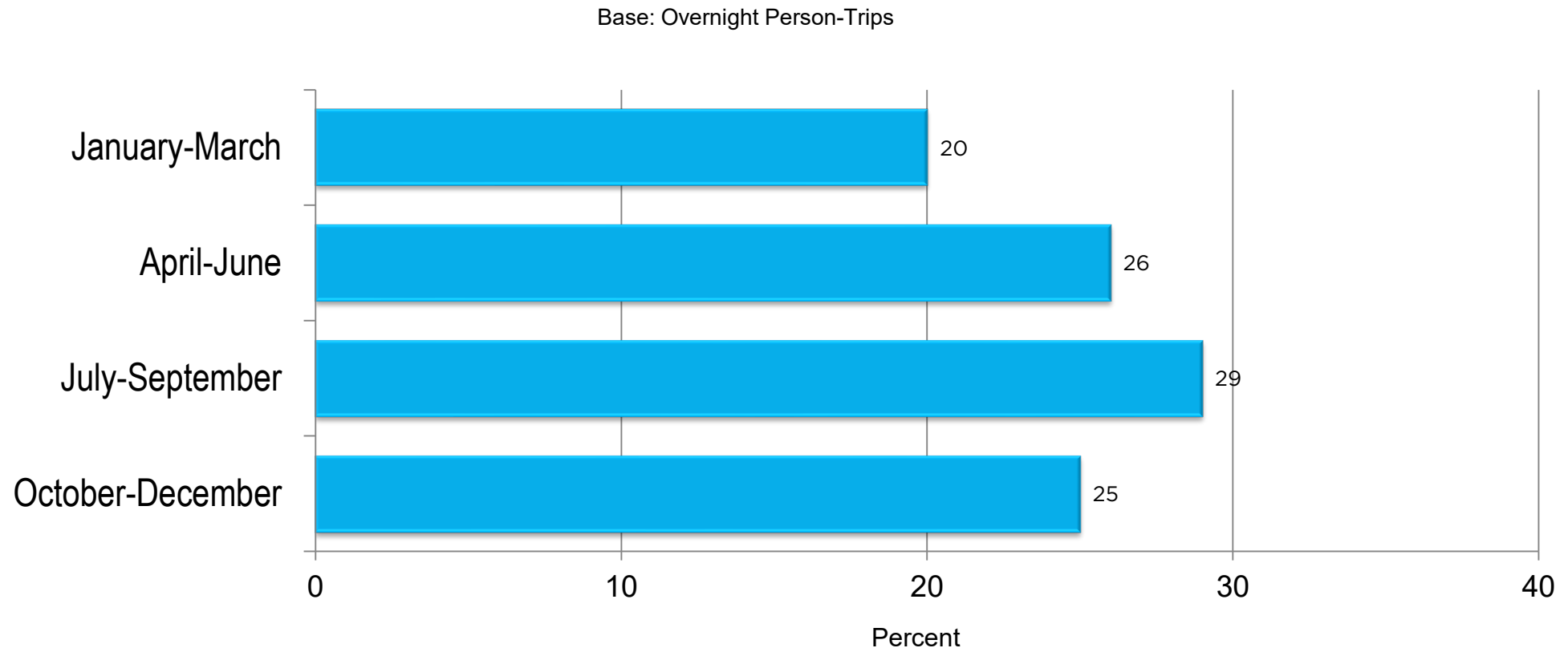
State Origin Of Trip



DMA Origin Of Trip

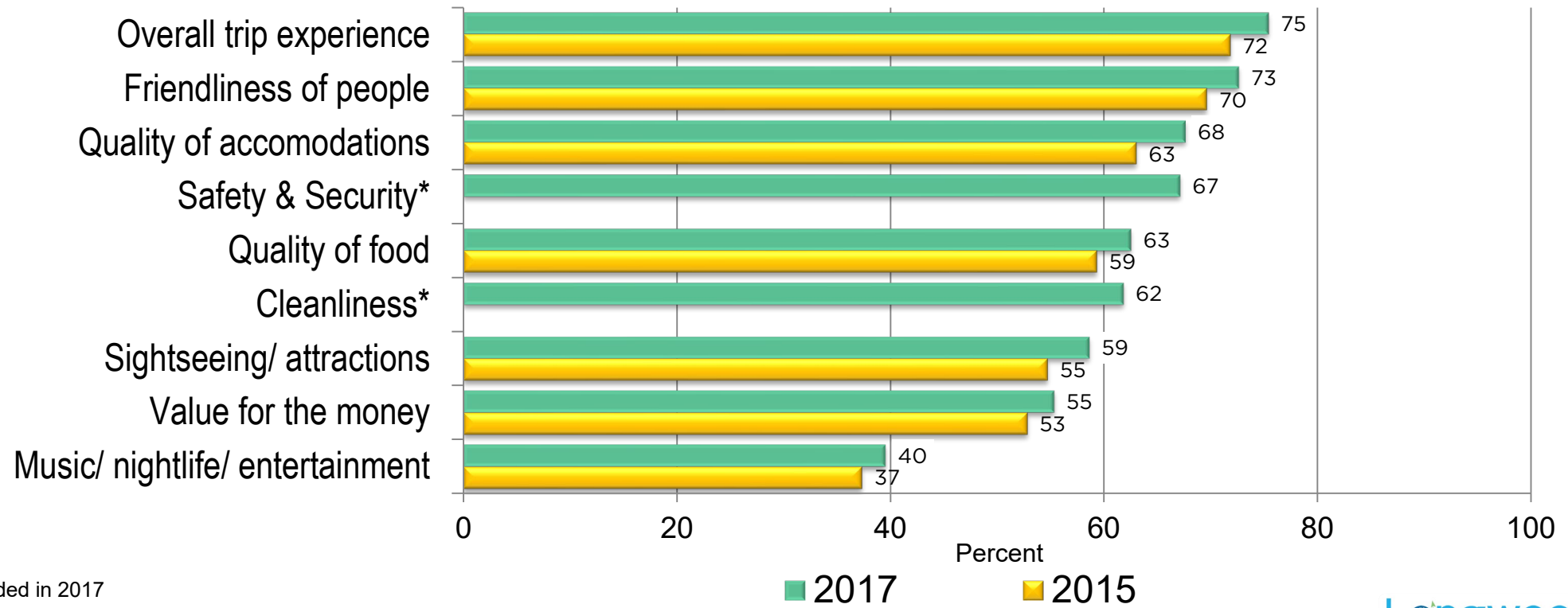


Season of Trip



% Very Satisfied with Trip

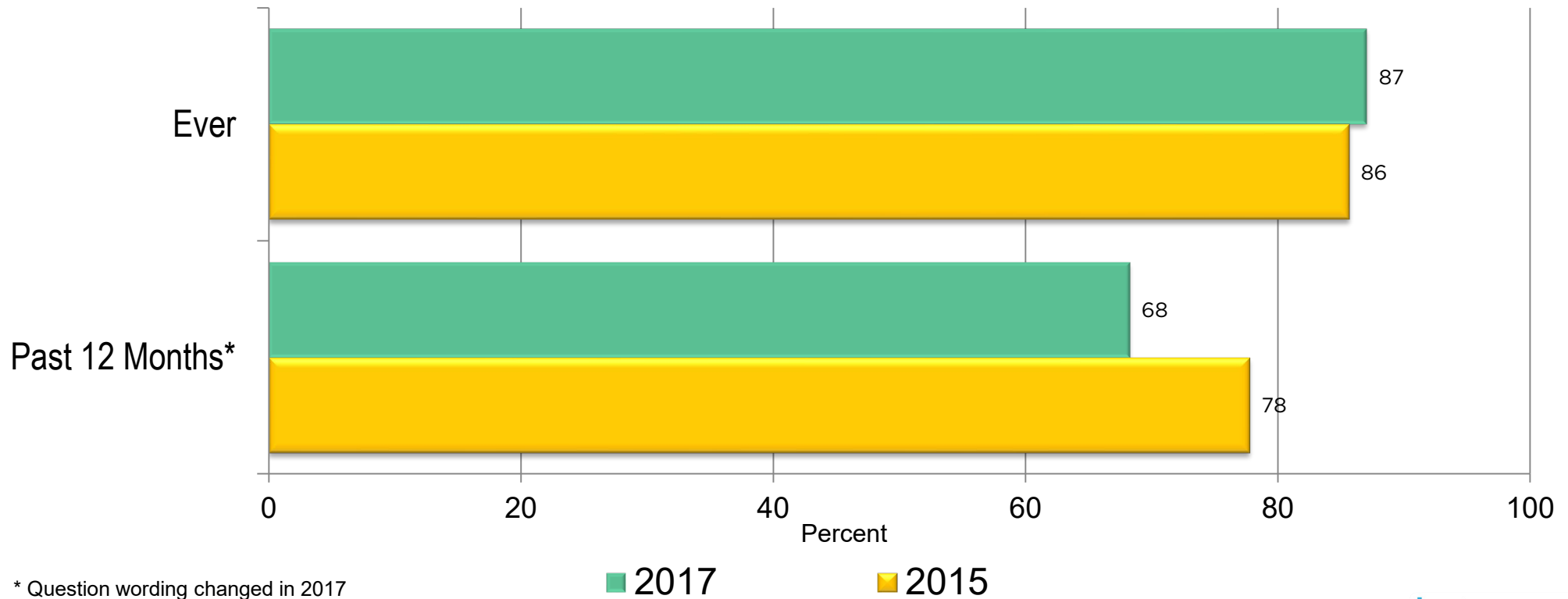
Base: Overnight Person-Trips



* Added in 2017

Past Visitation to West Virginia

Base: Overnight Person-Trips

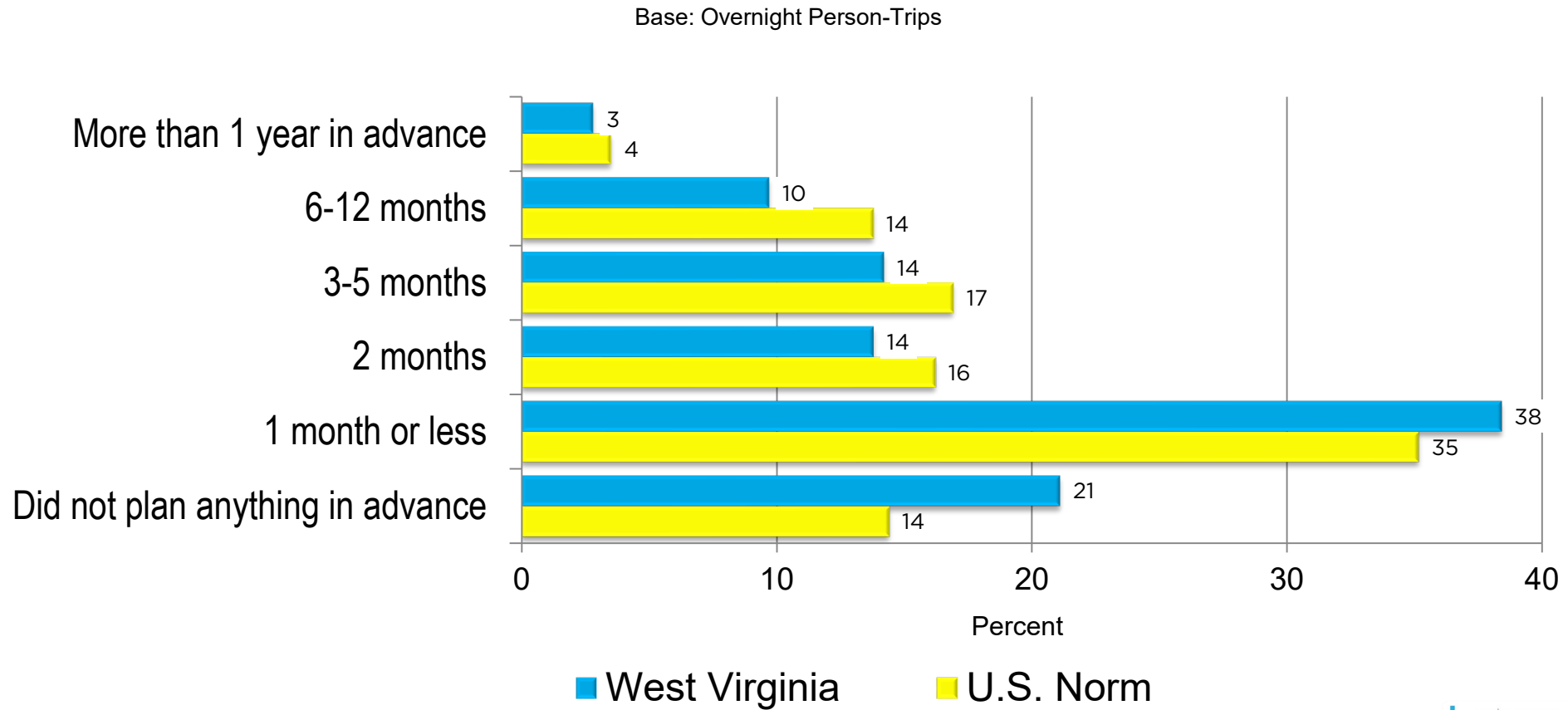


* Question wording changed in 2017

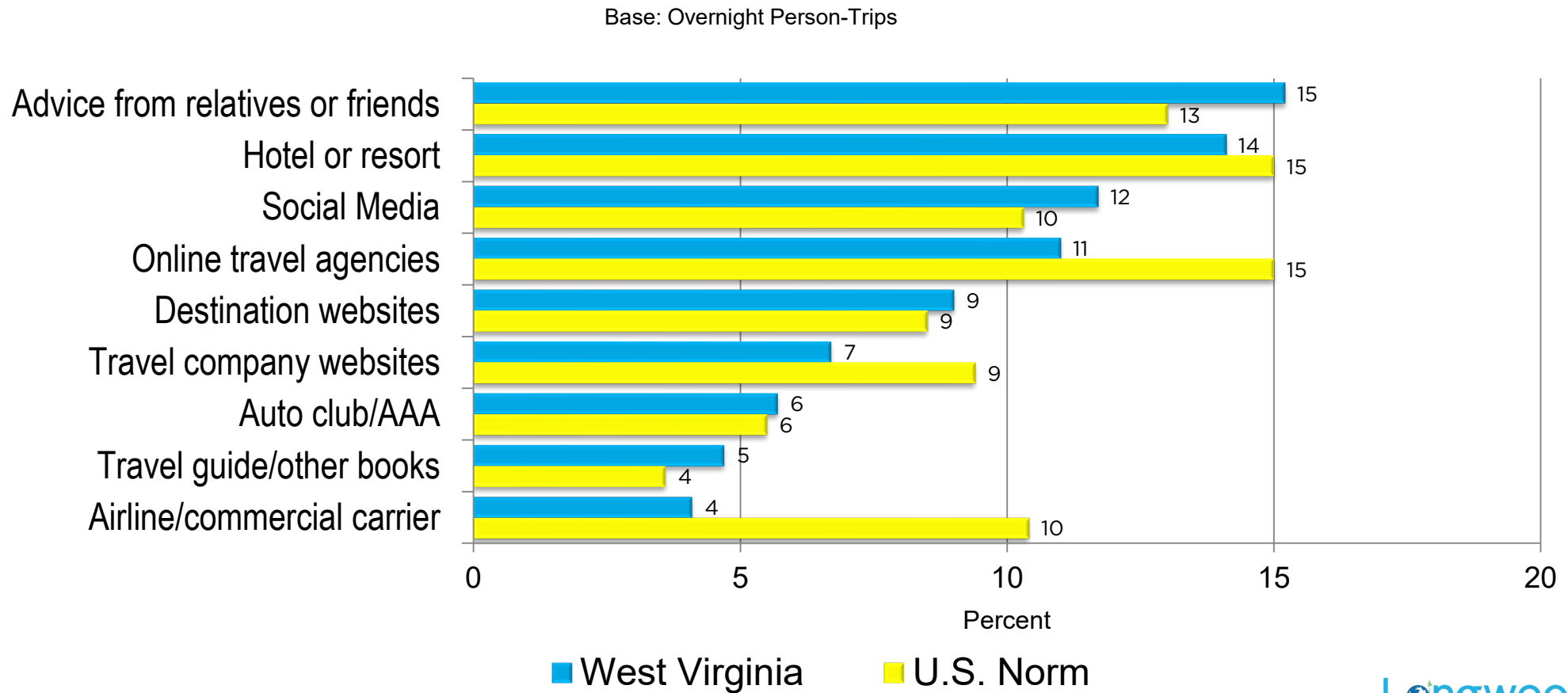
■ 2017

■ 2015

Length of Trip Planning

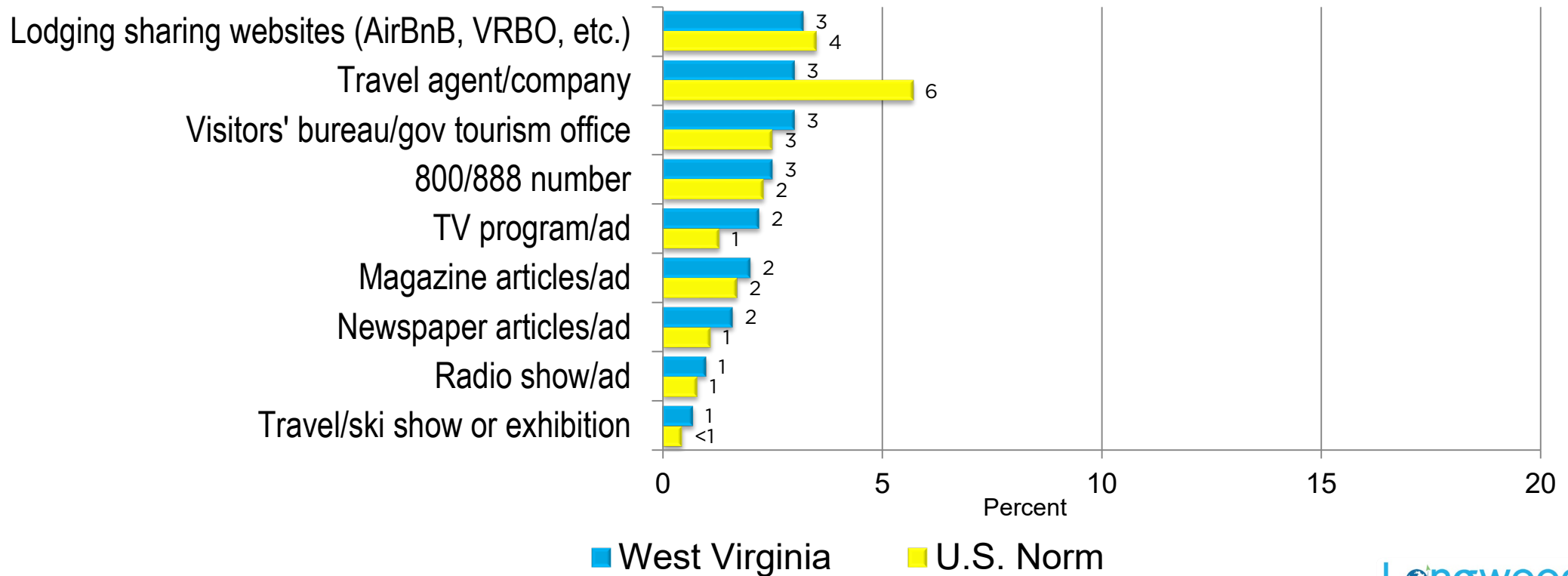


Trip Planning Information Sources

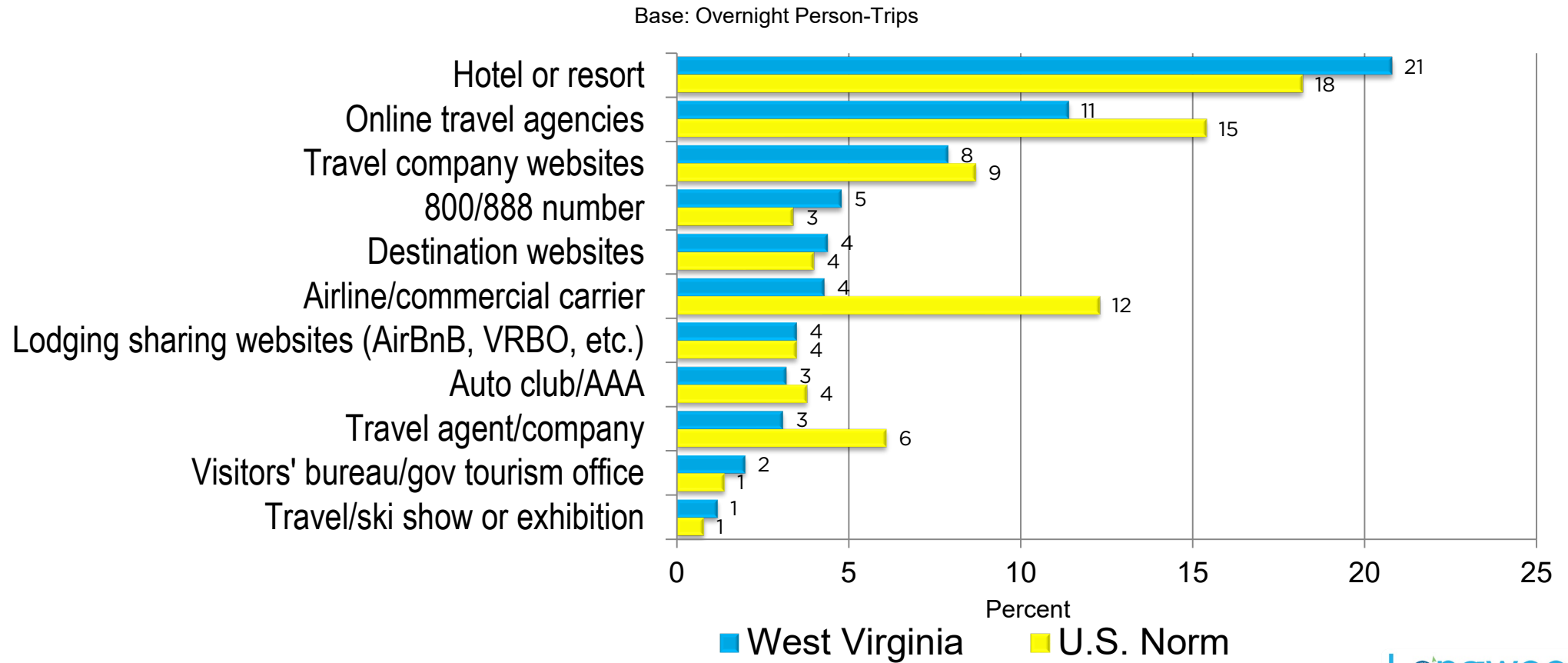


Trip Planning Information Sources (Cont'd)

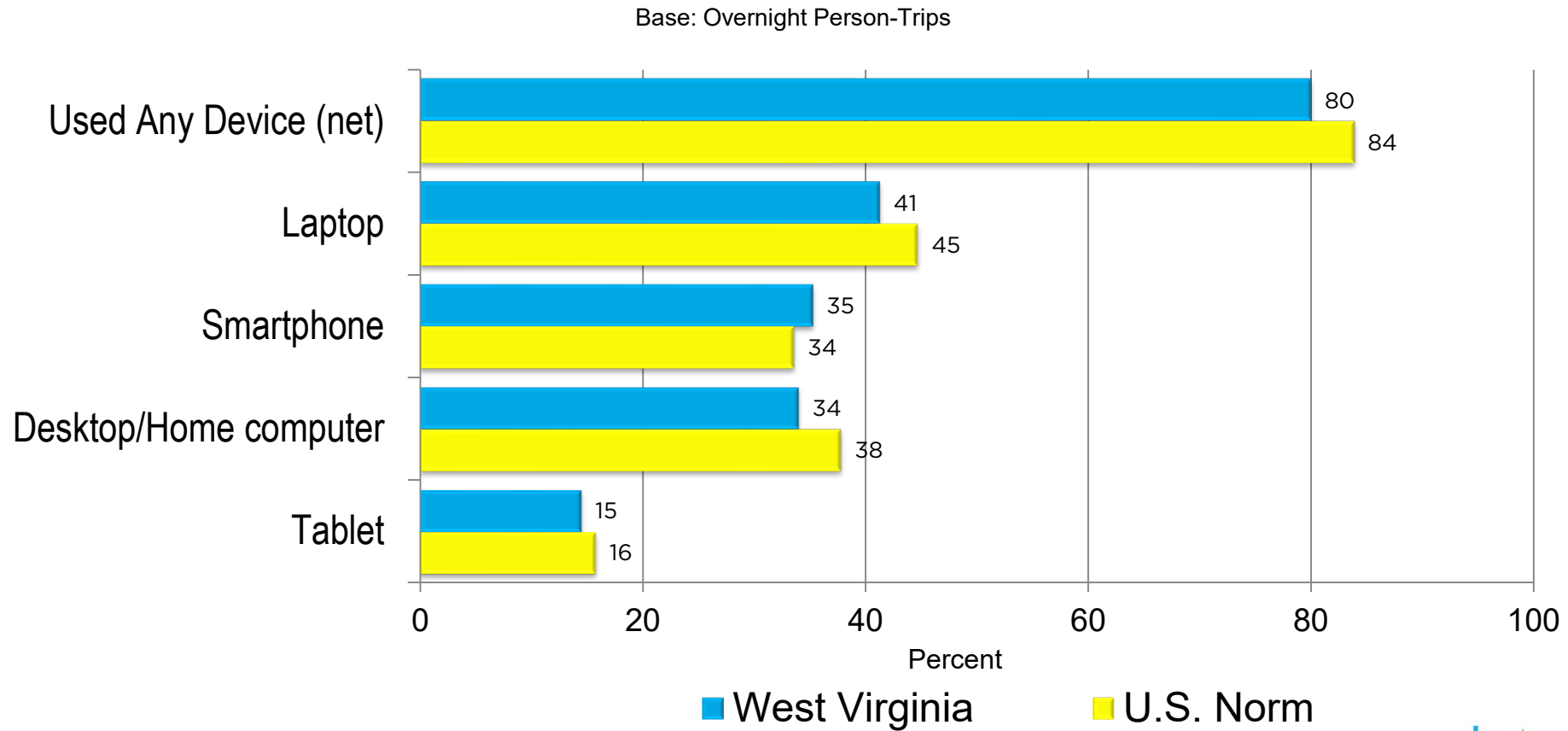
Base: Overnight Person-Trips



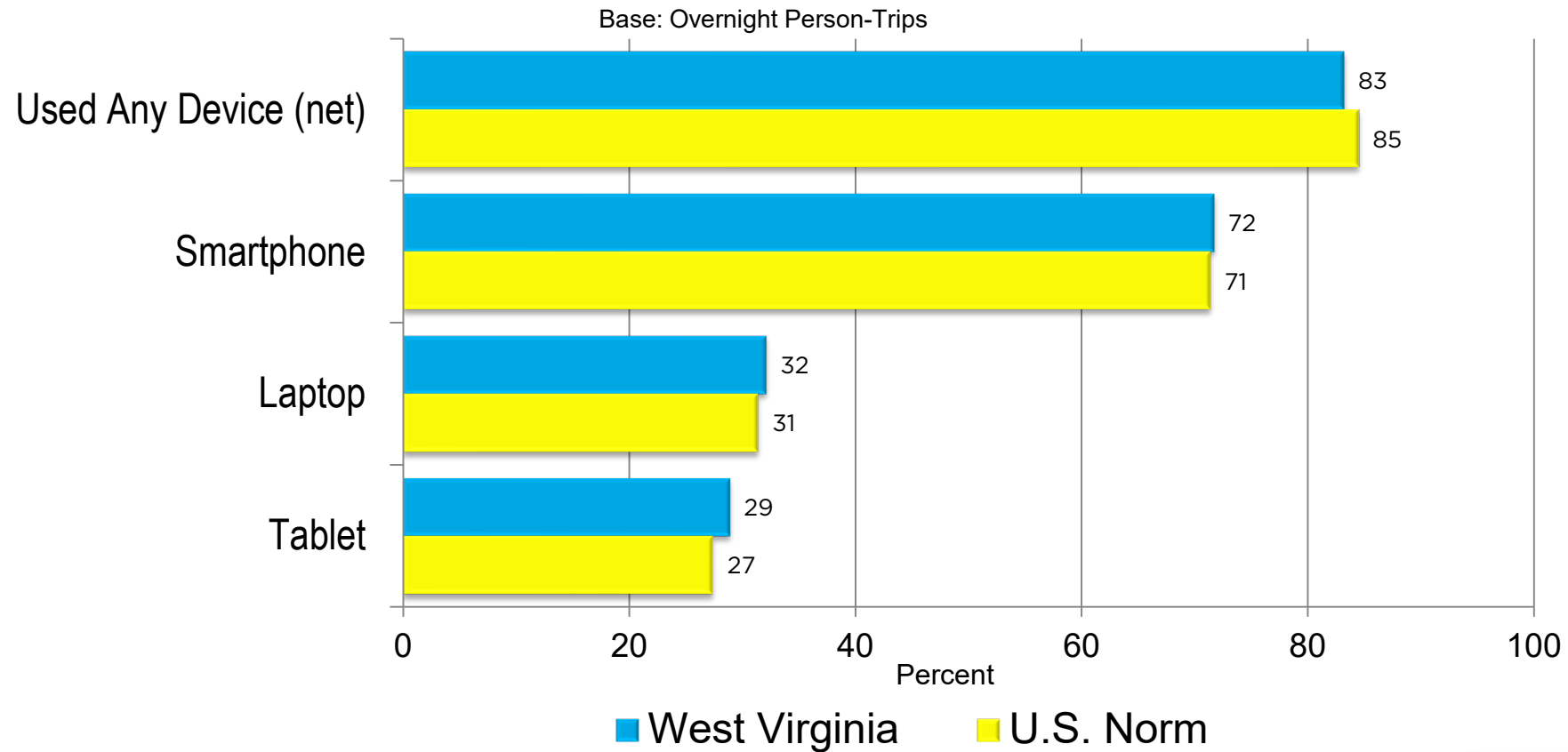
Method of Booking



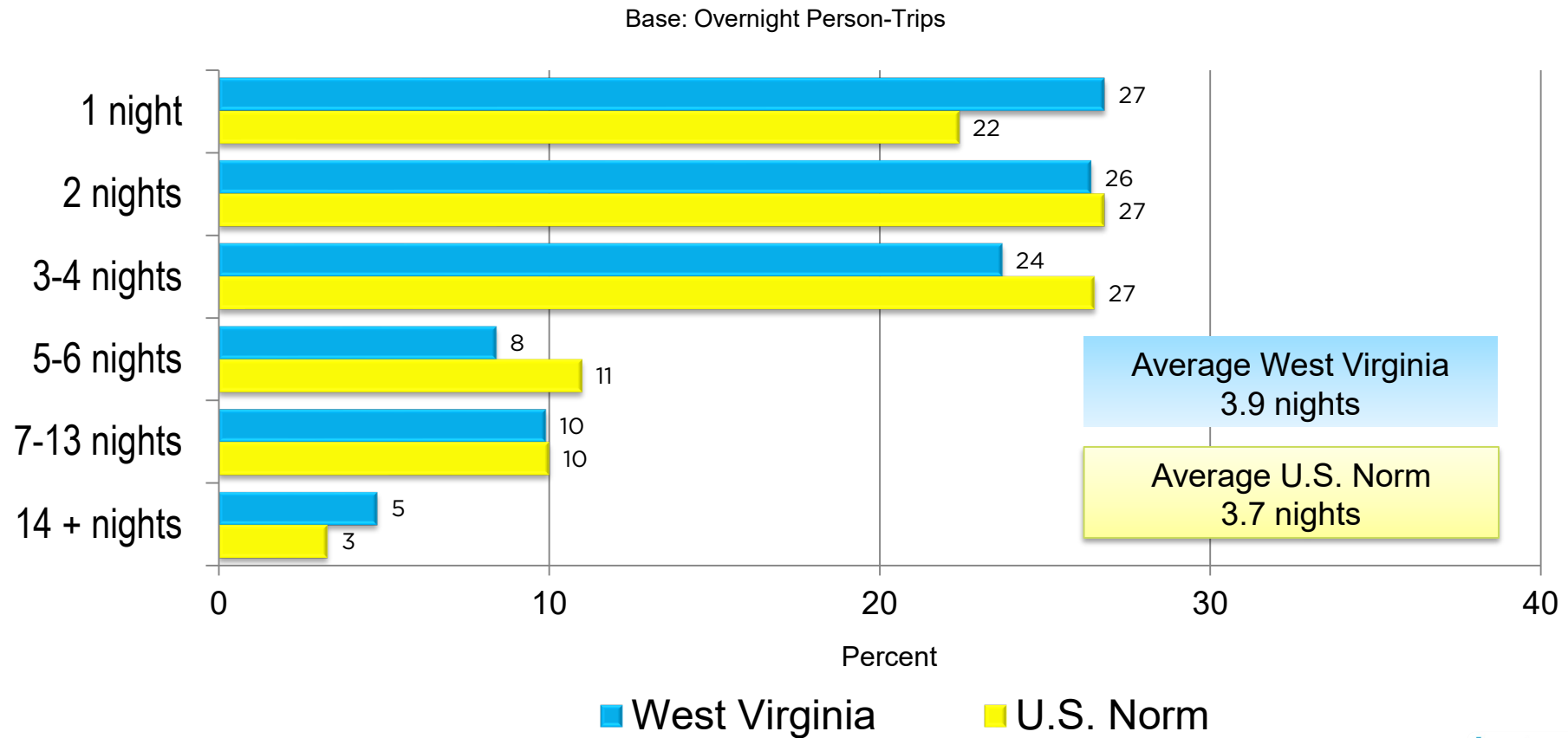
Devices Used for Trip Planning



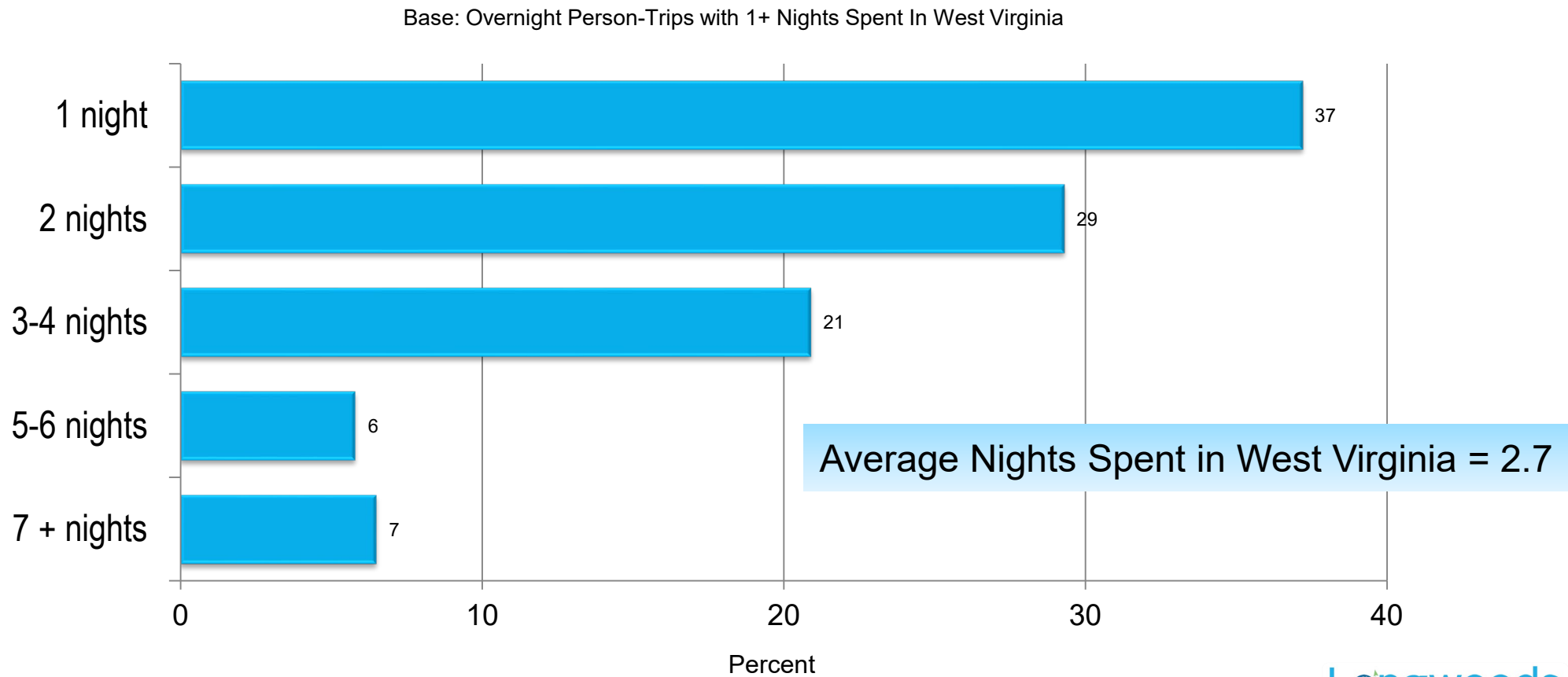
Devices Used During Trip



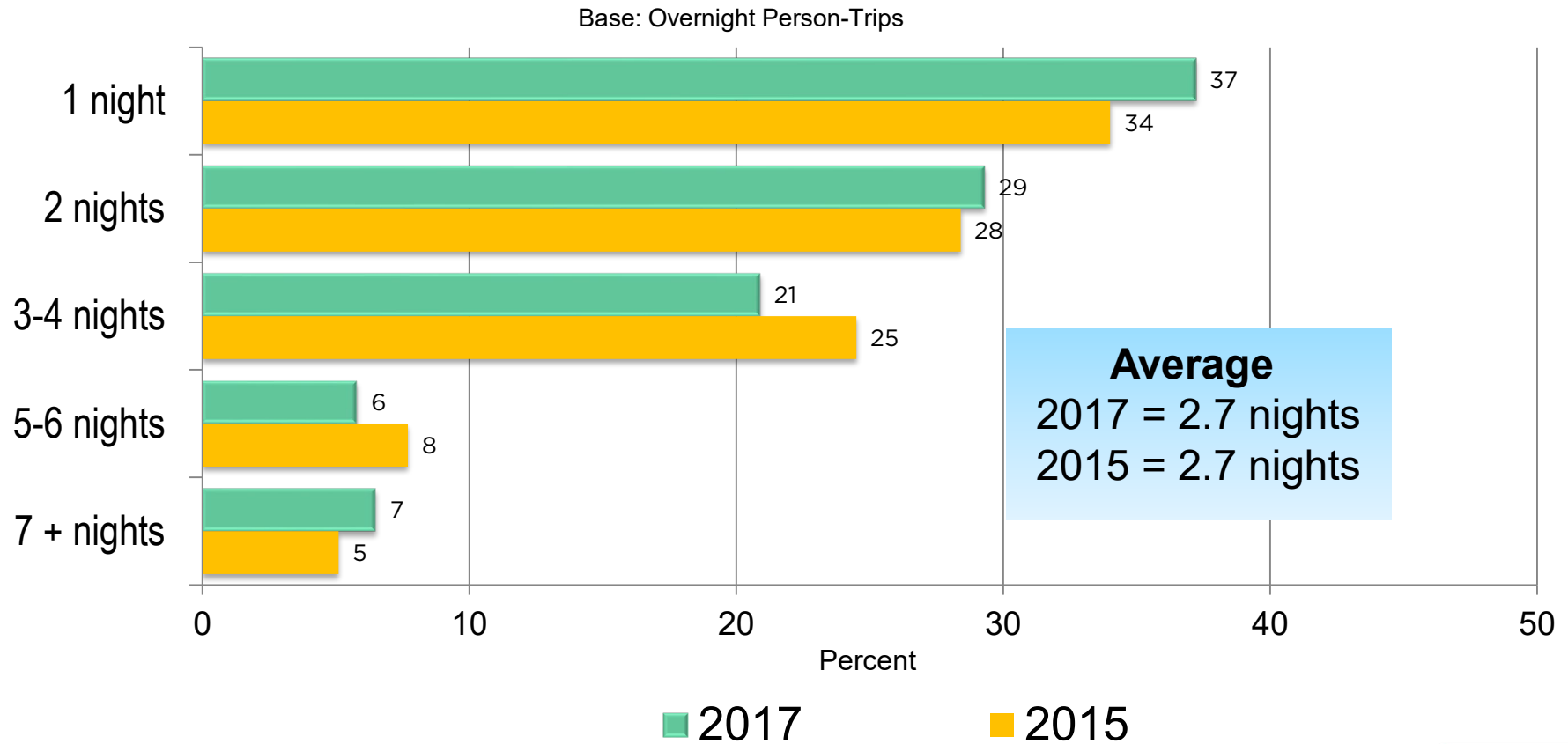
Total Nights Away on Trip



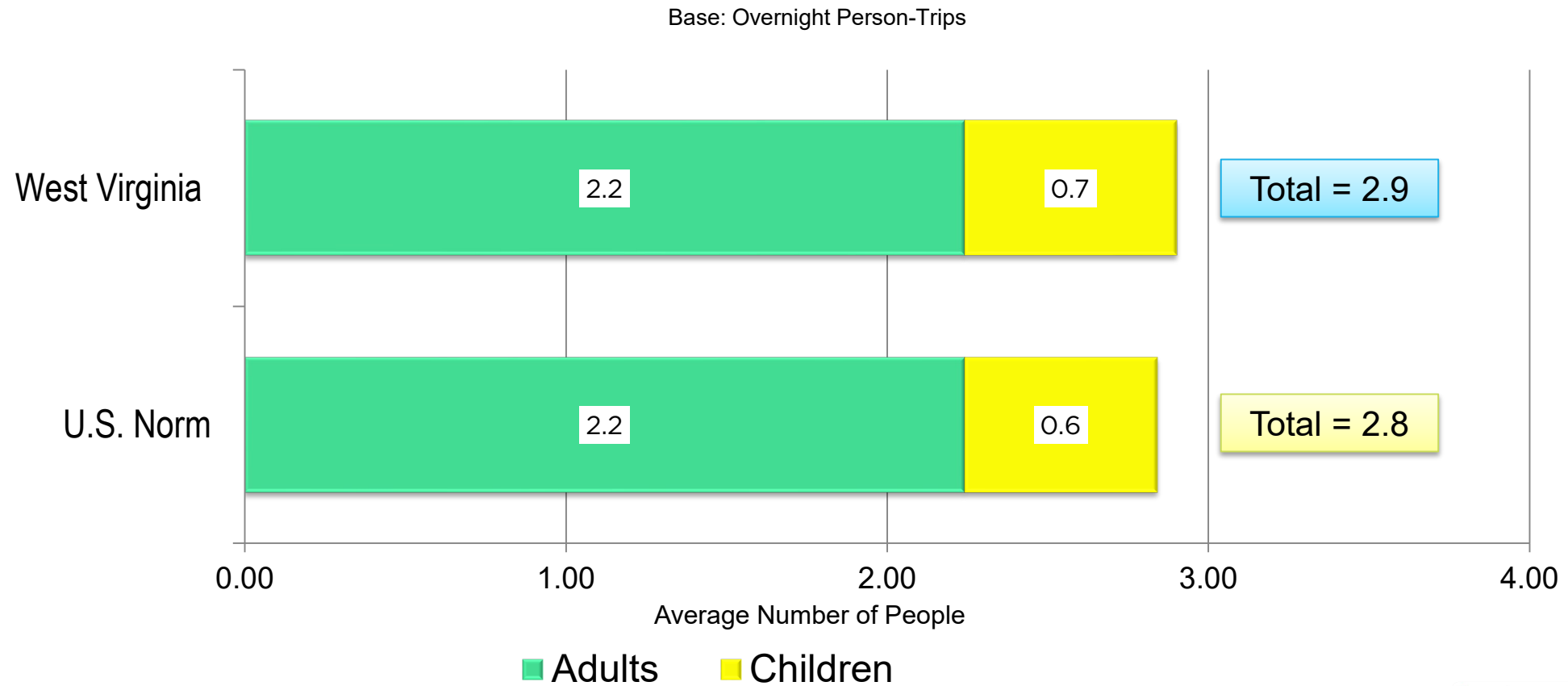
Number of Nights Spent in West Virginia



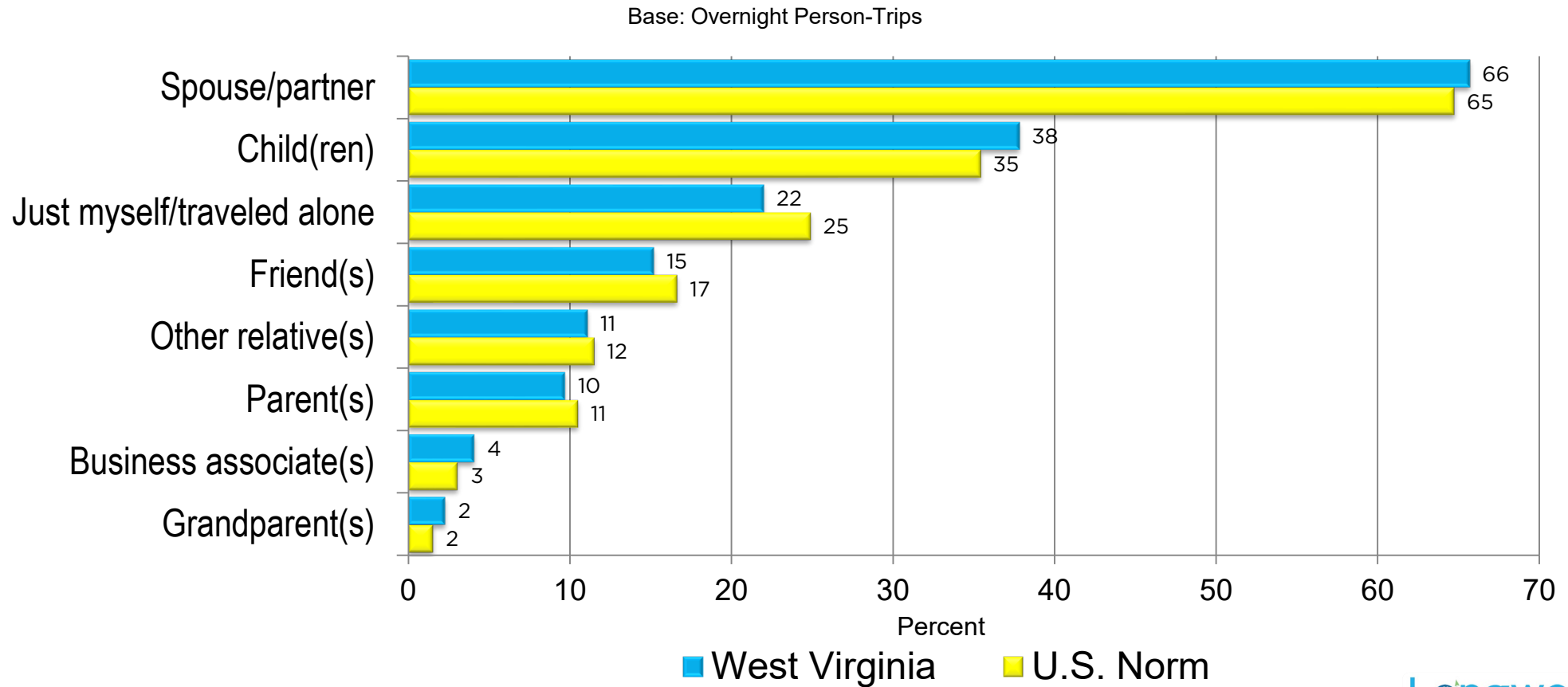
Number of Nights Spent in West Virginia - 2017 vs. 2015



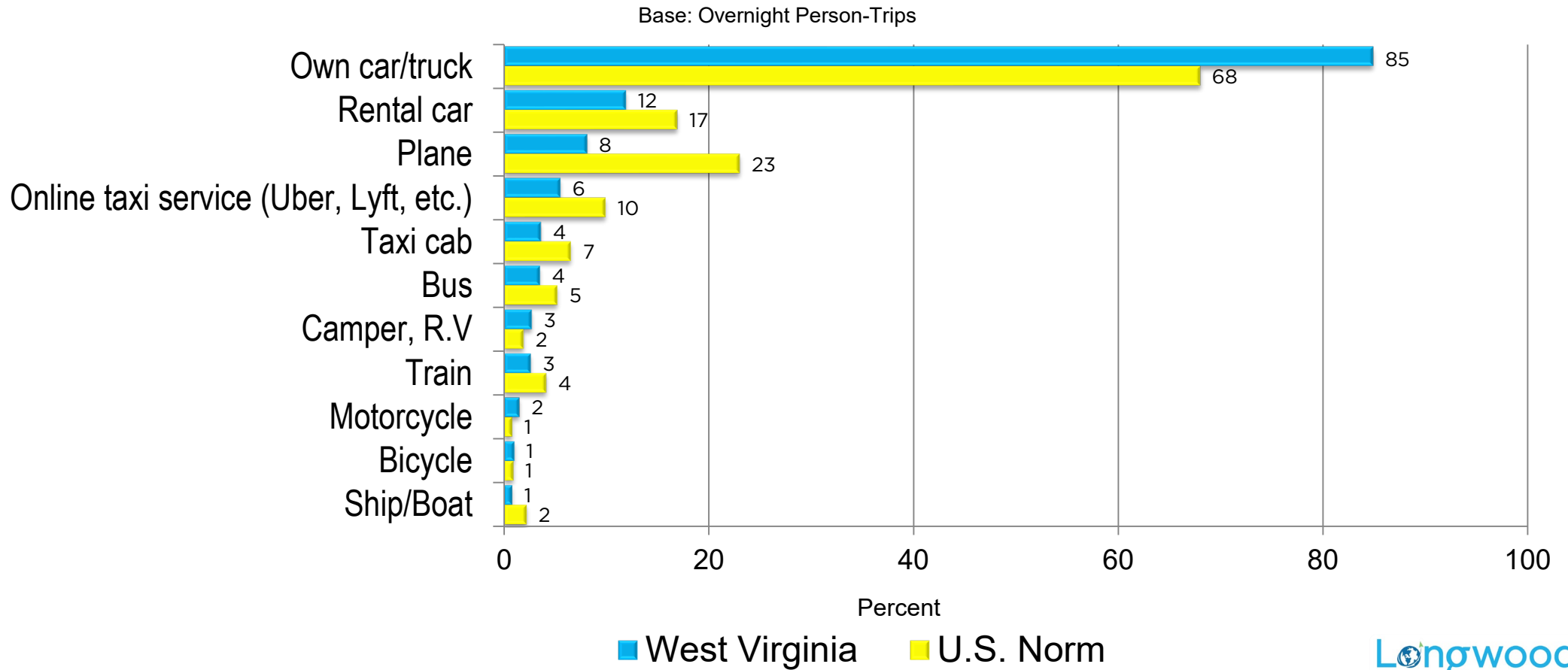
Size of Travel Party



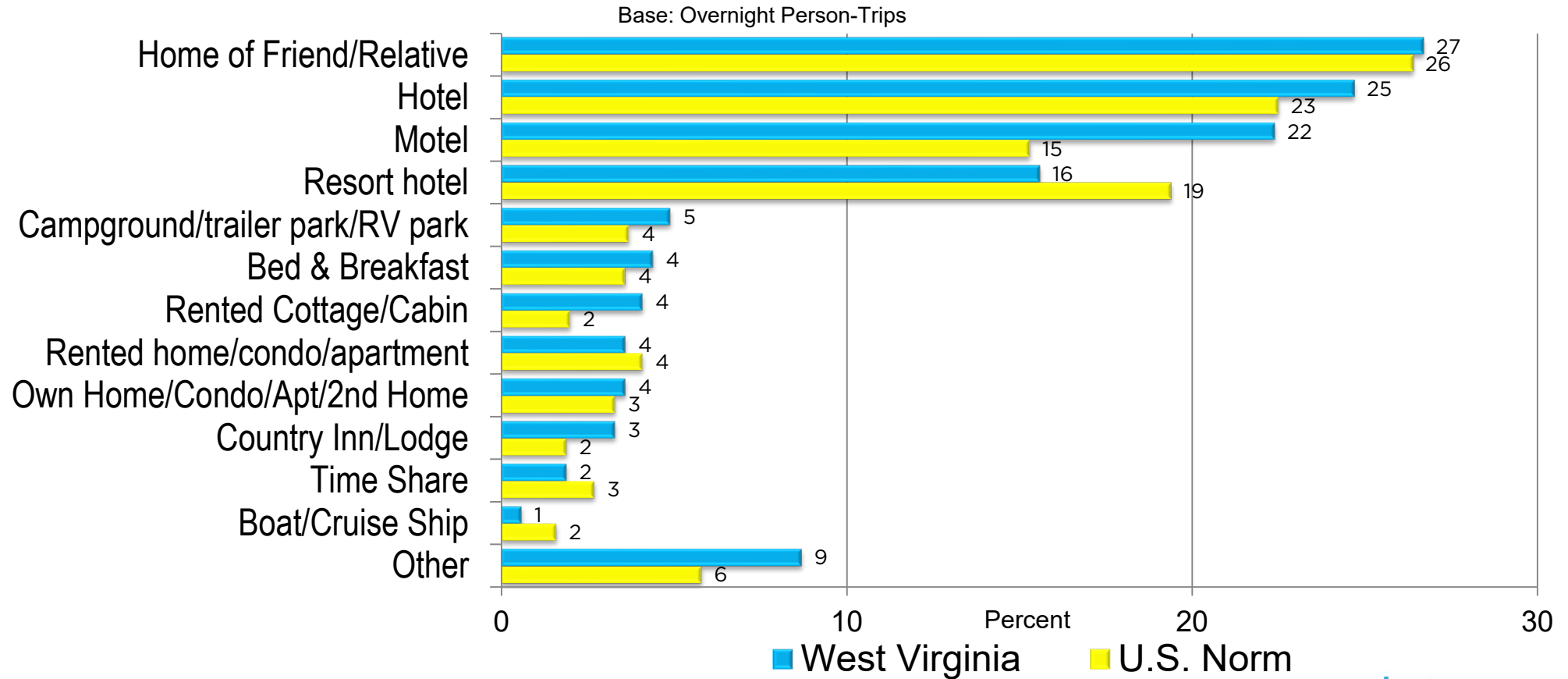
Composition of Immediate Travel Party



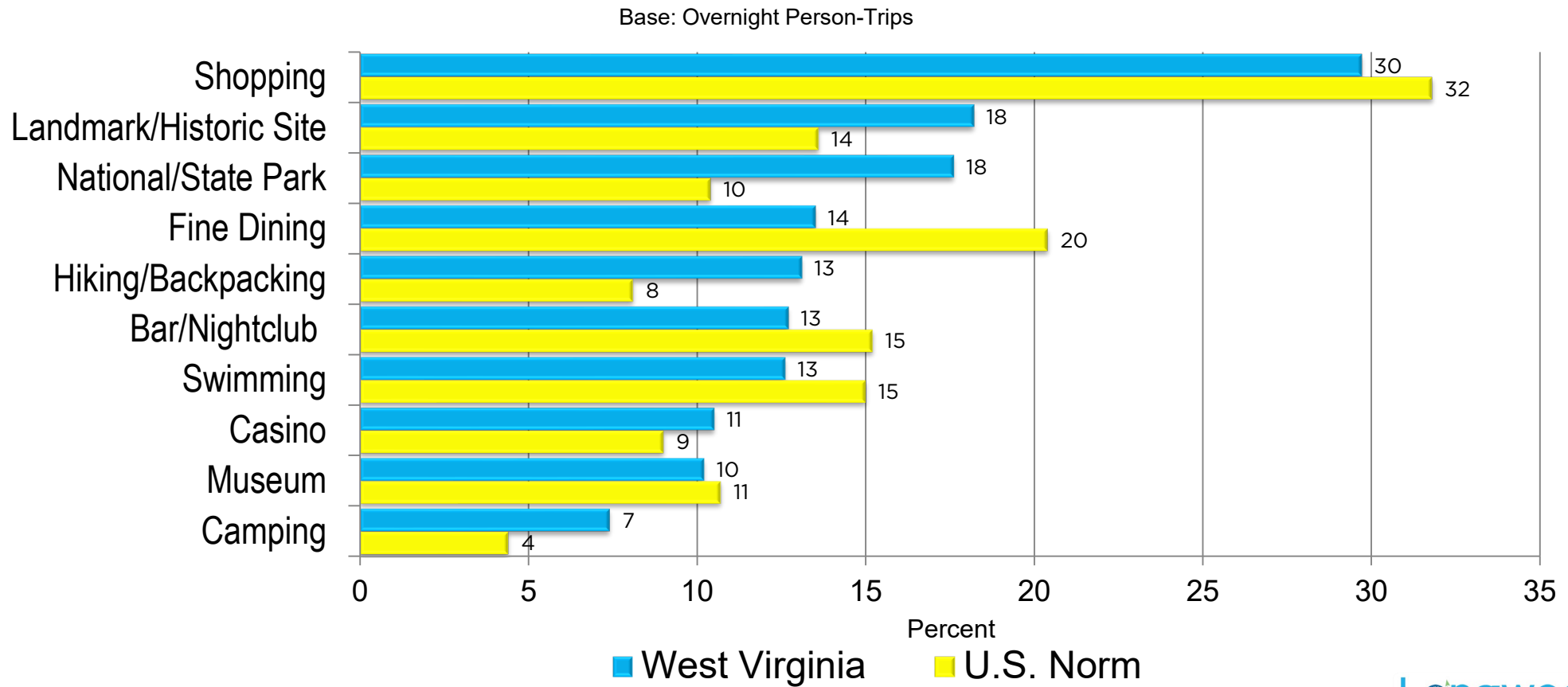
Transportation



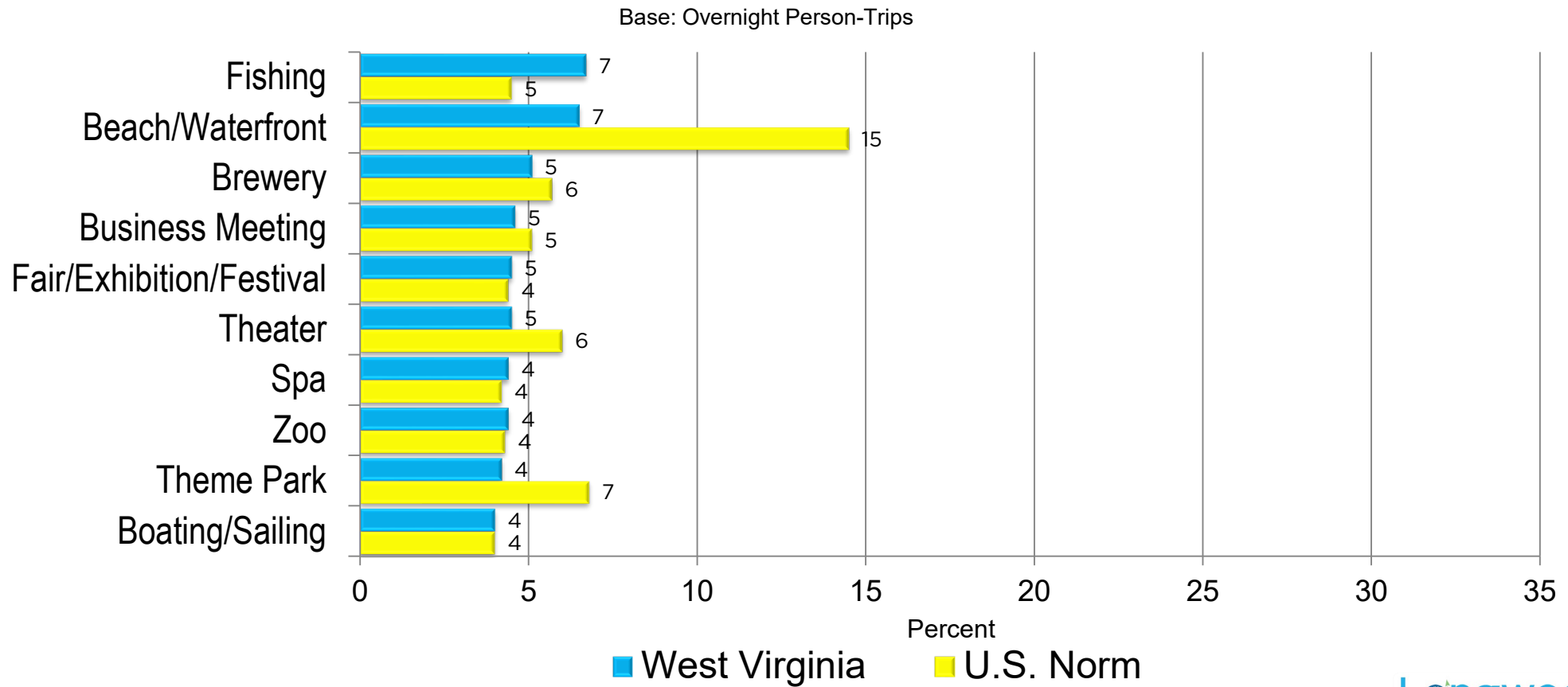
Accommodations



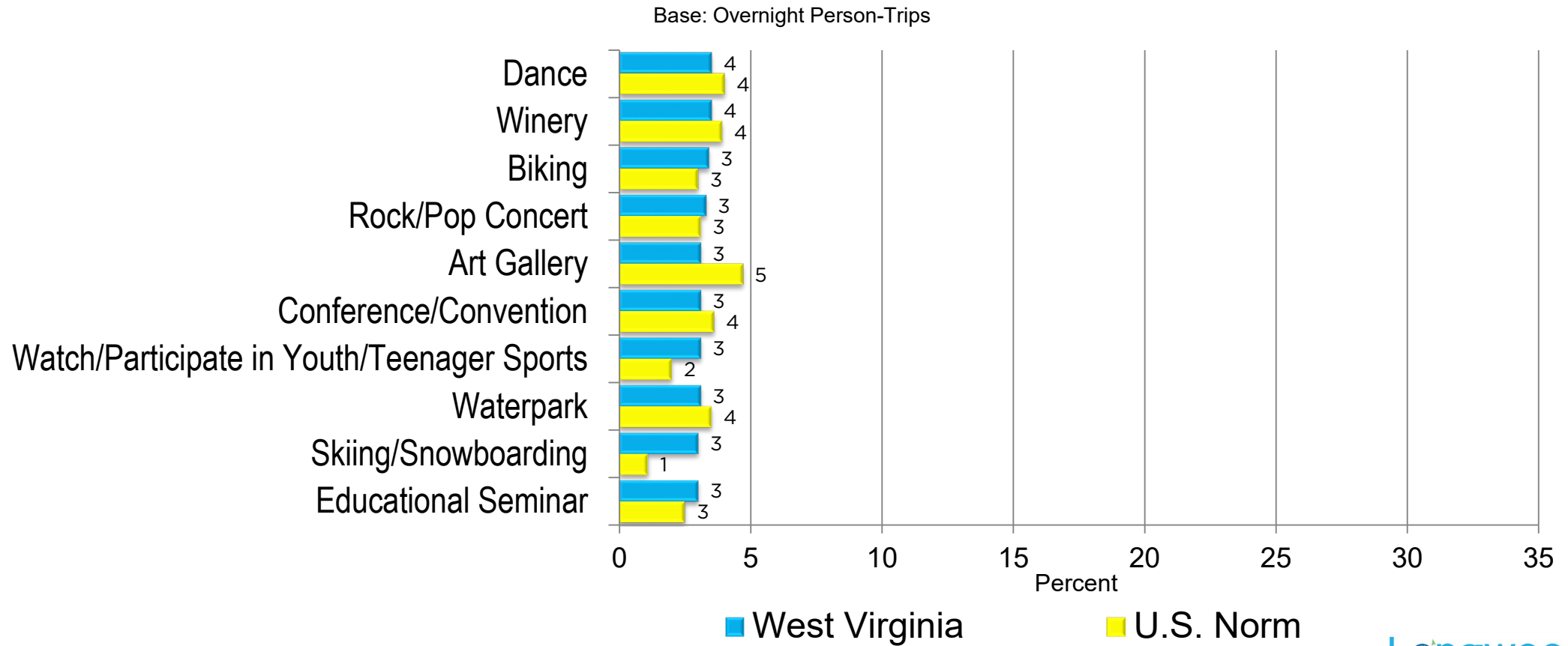
Activities and Experiences



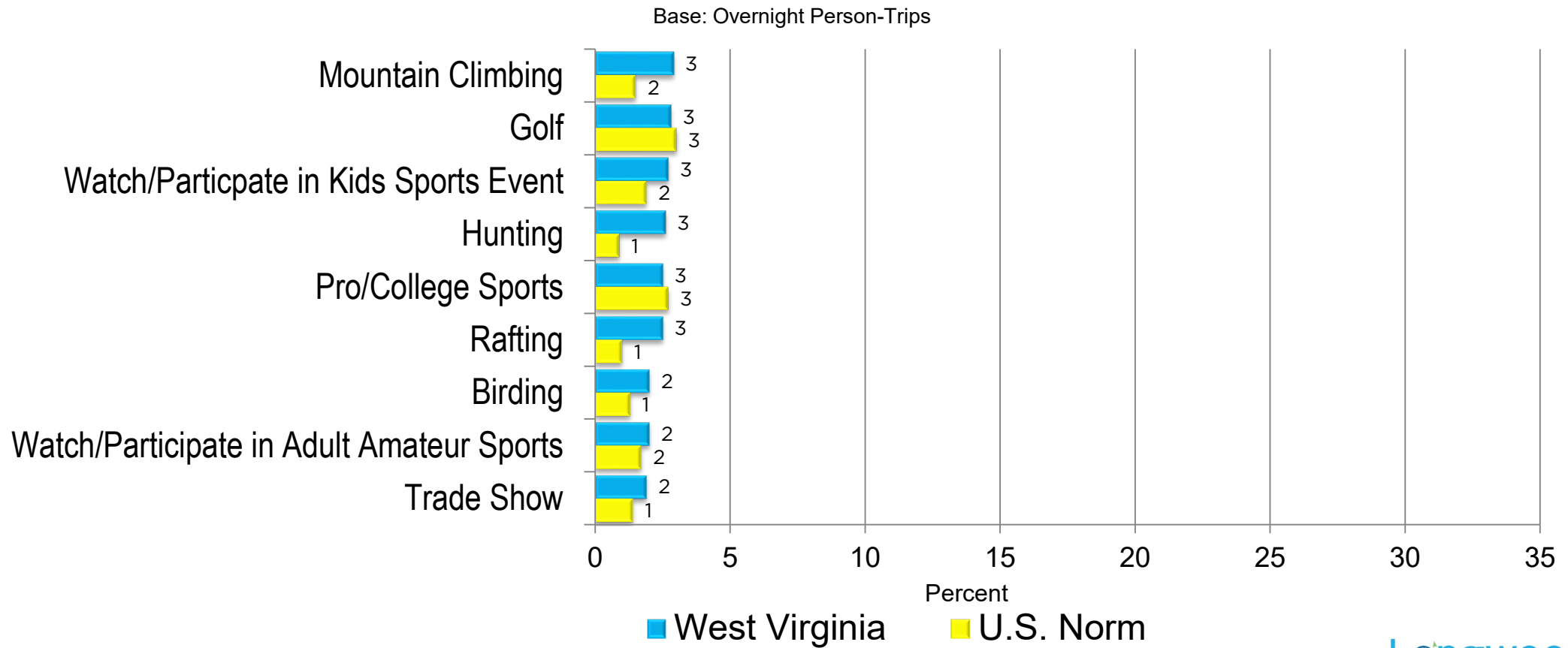
Activities and Experiences (Cont'd)



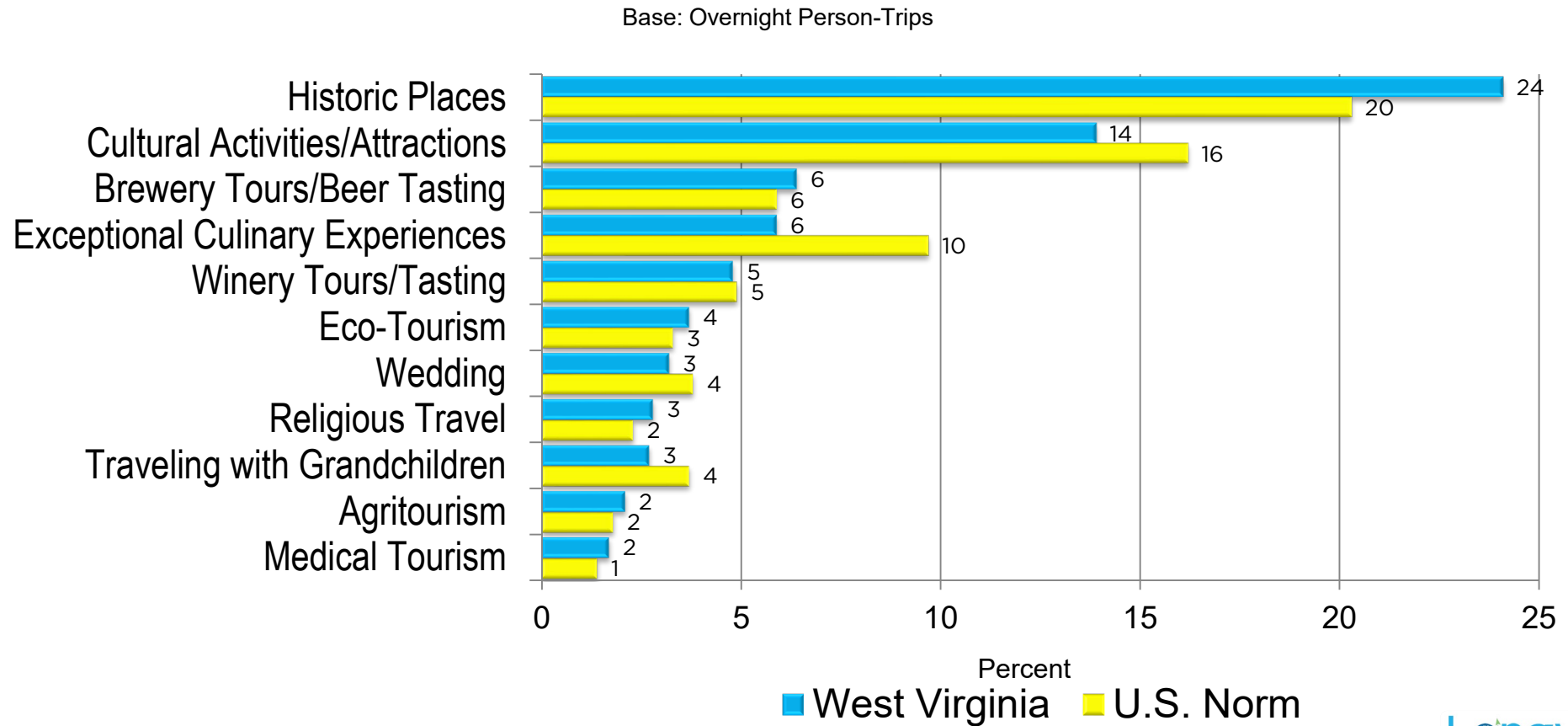
Activities and Experiences (Cont'd)



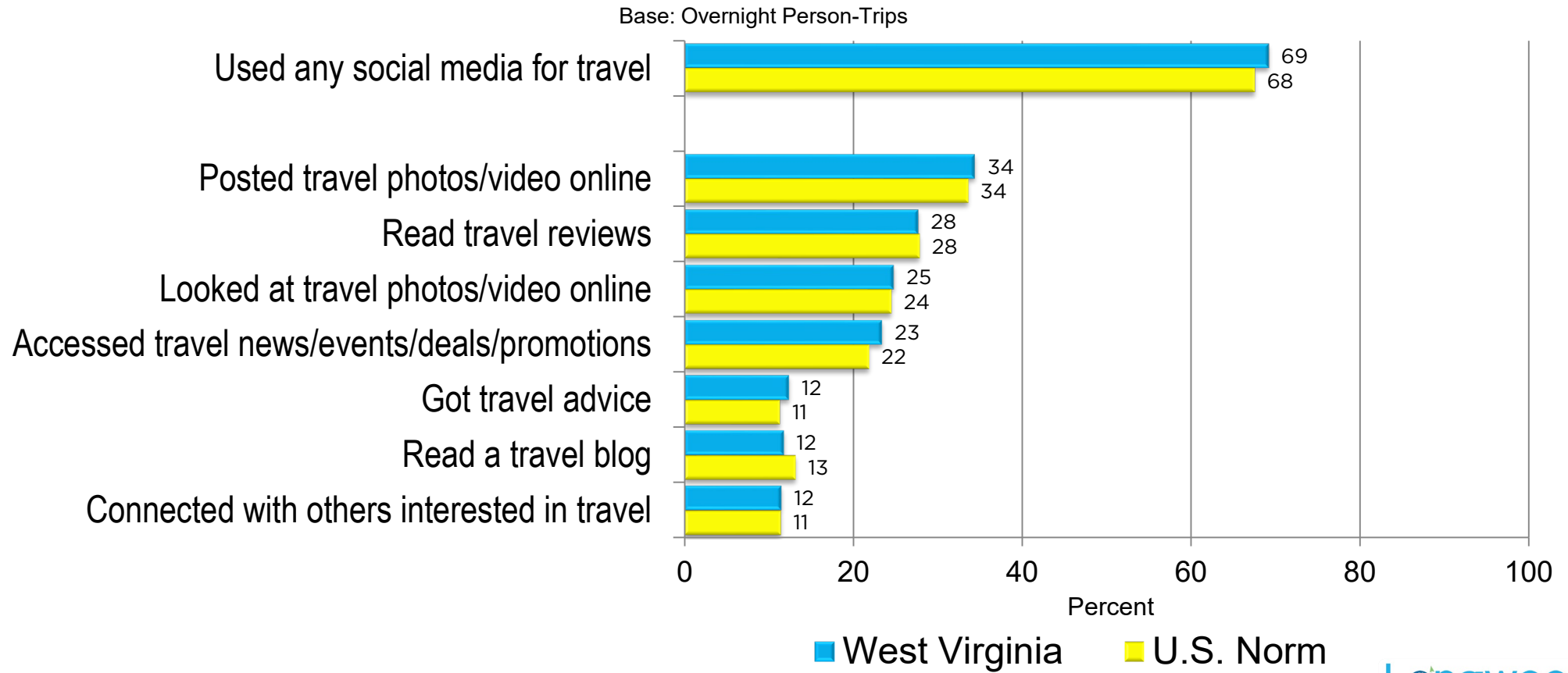
Activities and Experiences (Cont'd)



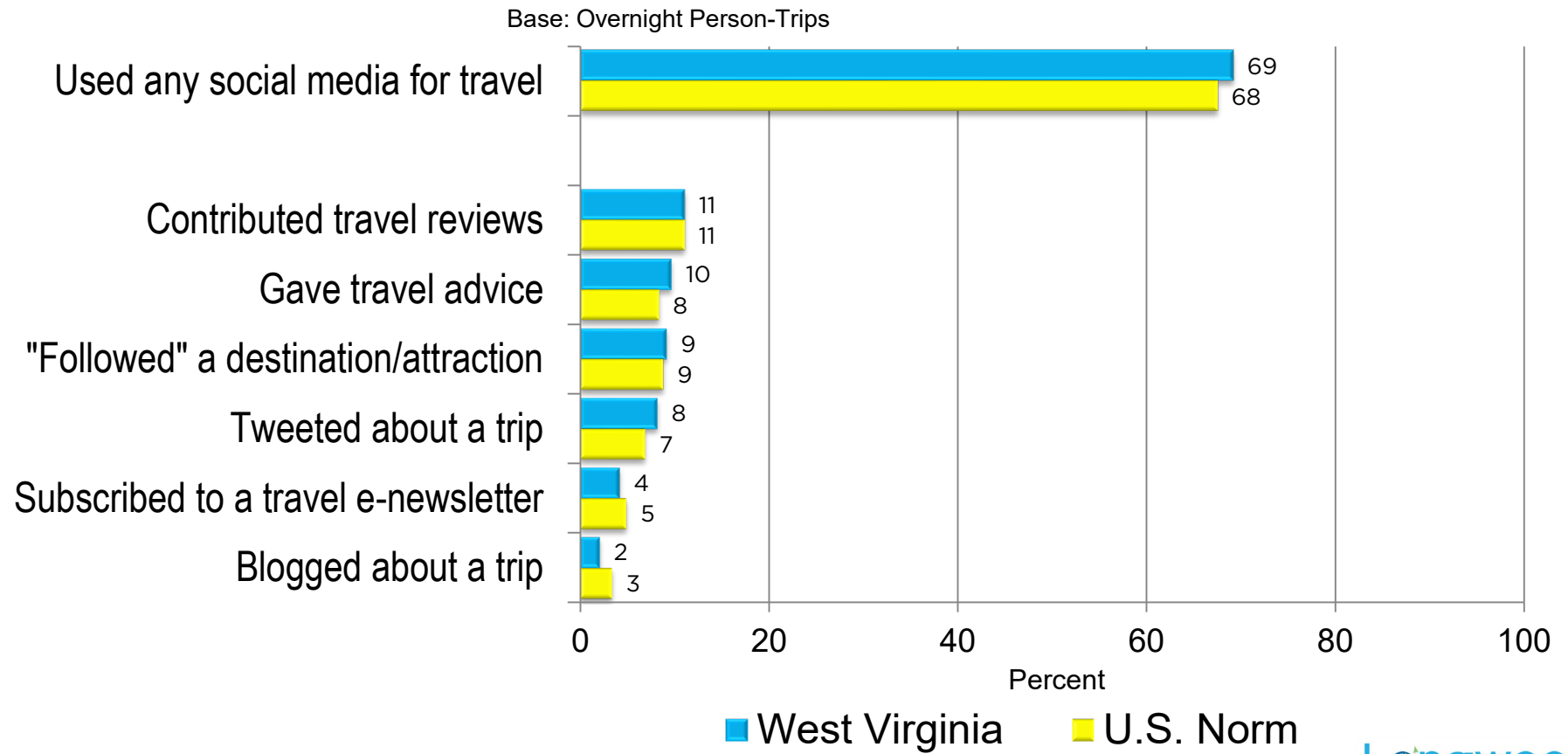
Activities of Special Interest



Online Social Media Use by Travelers

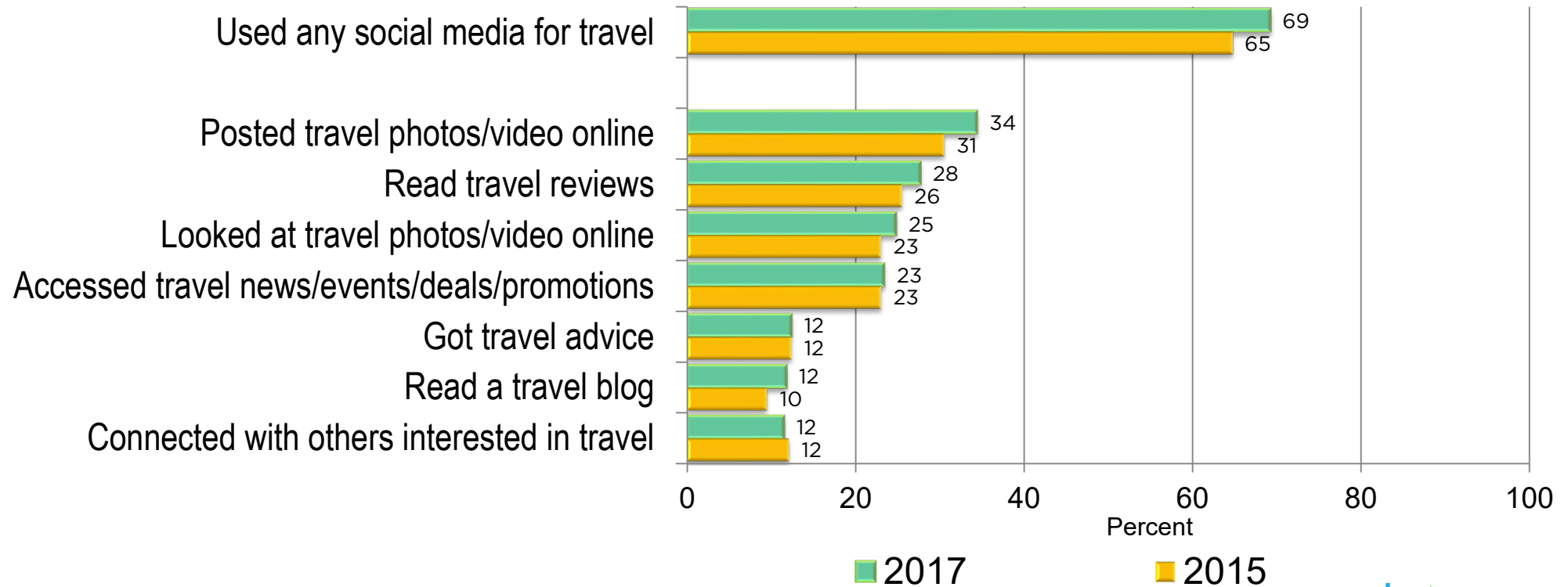


Online Social Media Use by Travelers (Cont'd)



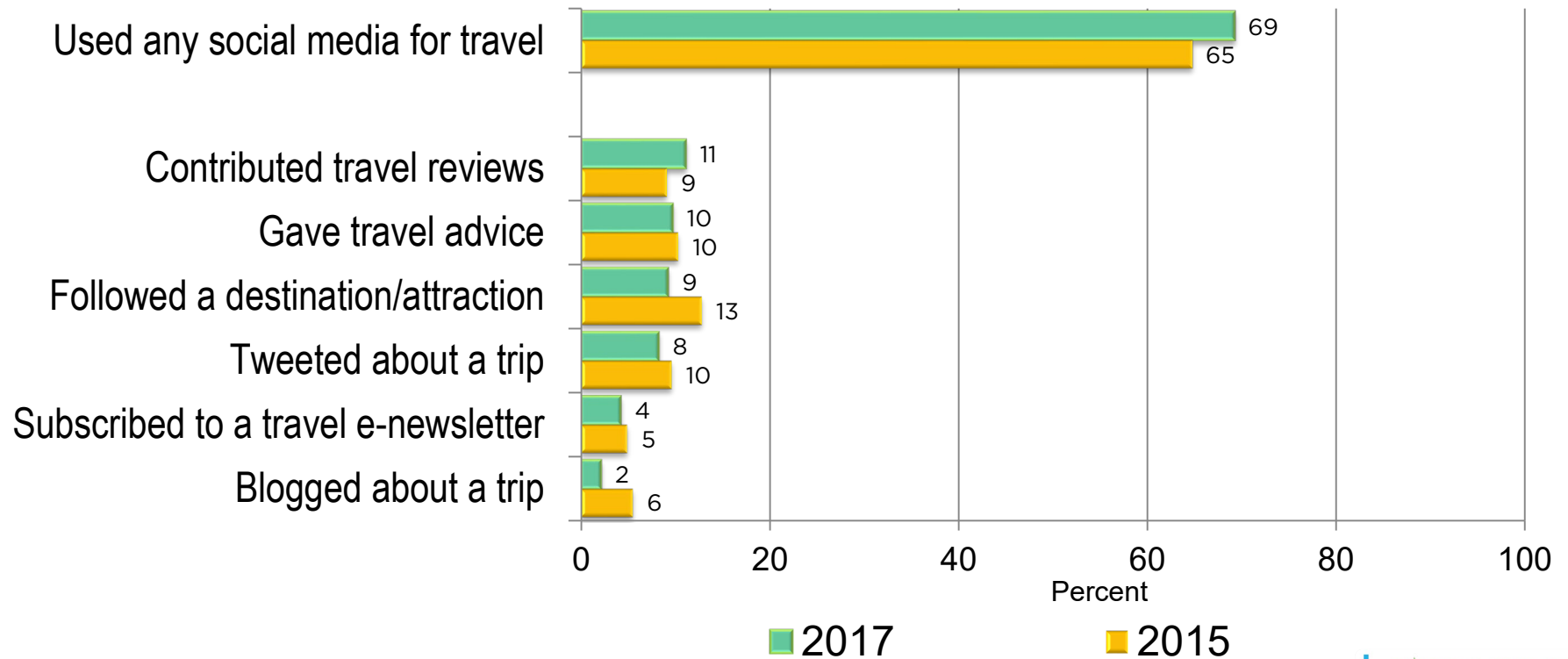
Online Social Media Use by Travelers – 2017 vs. 2015

Base: Overnight Person-Trips

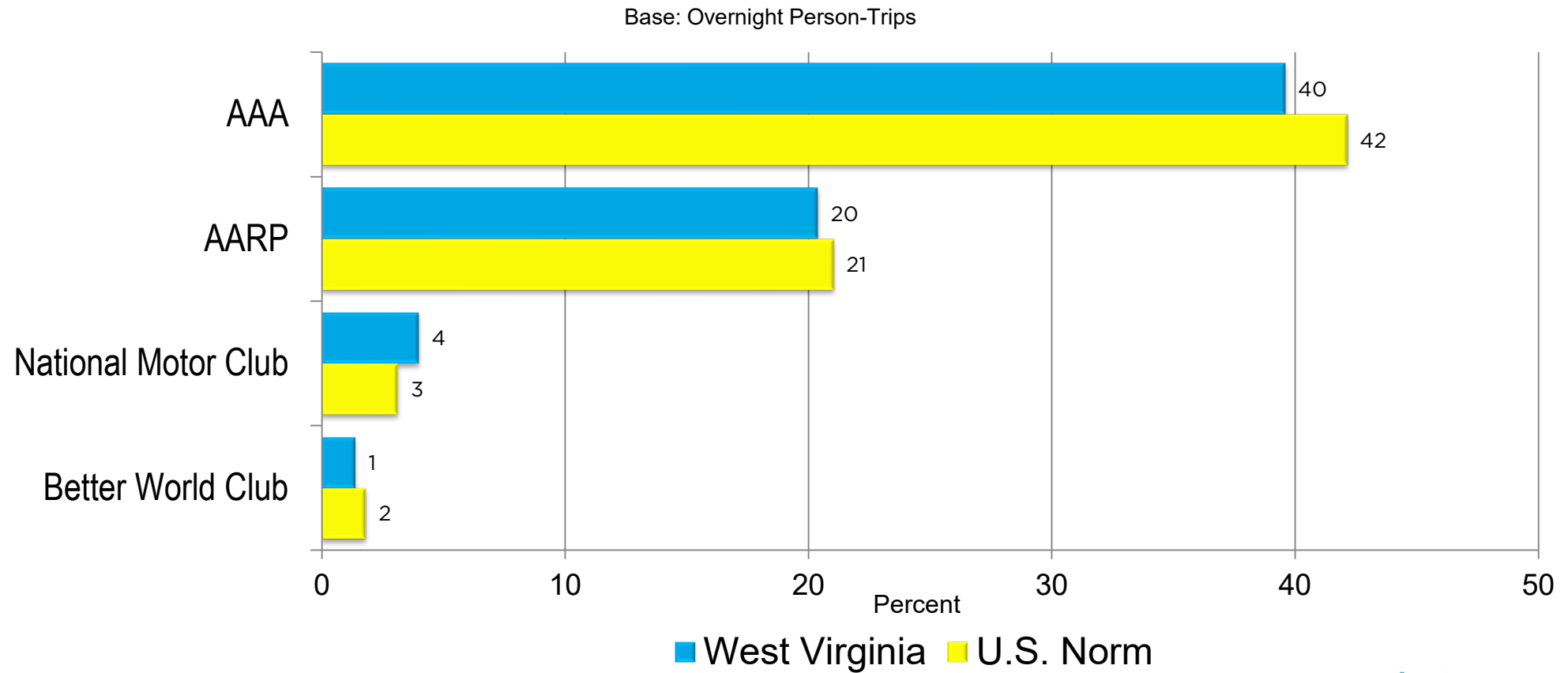


Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)

Base: Overnight Person-Trips



Organization Membership

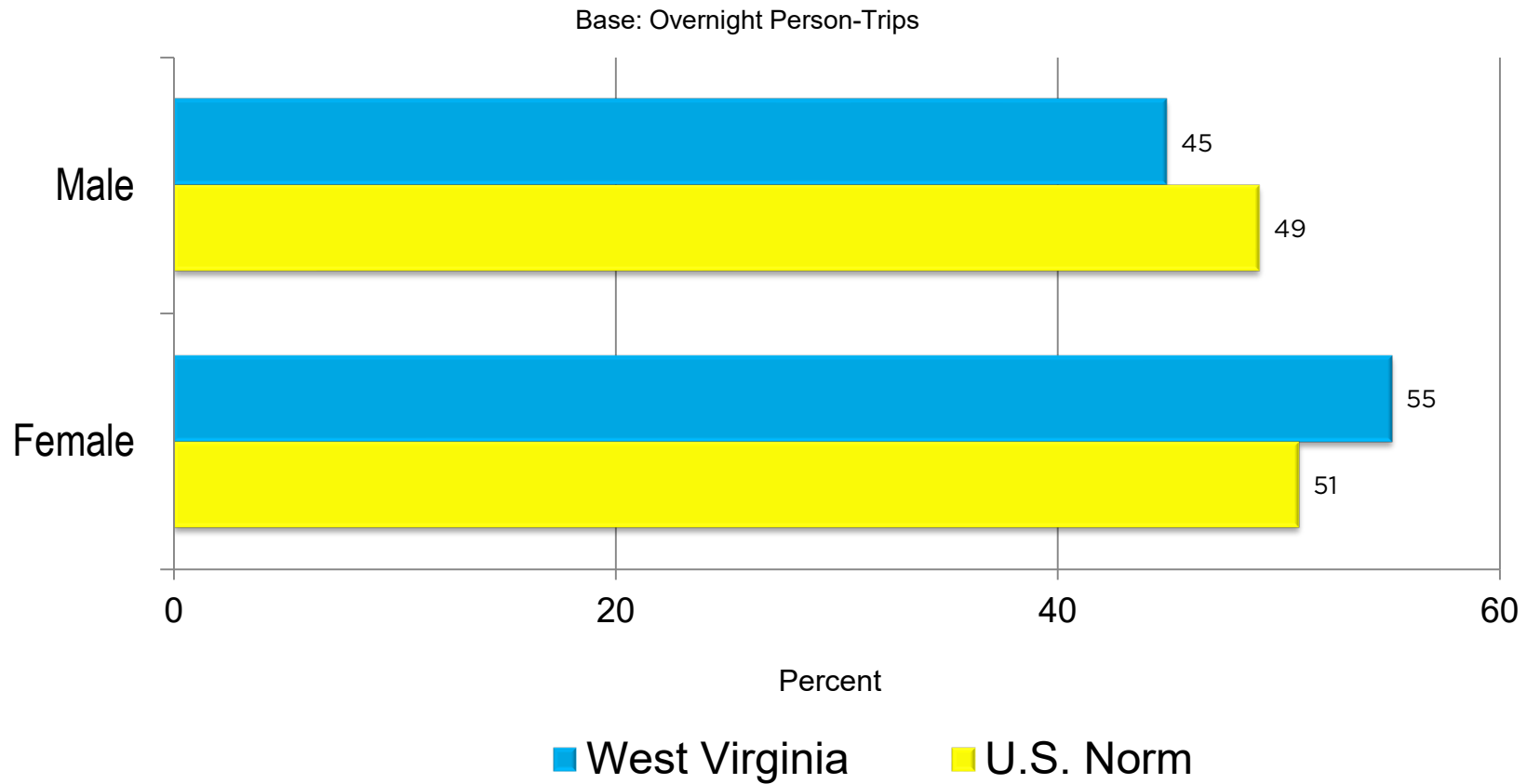




Demographic Profile of Overnight Visitors

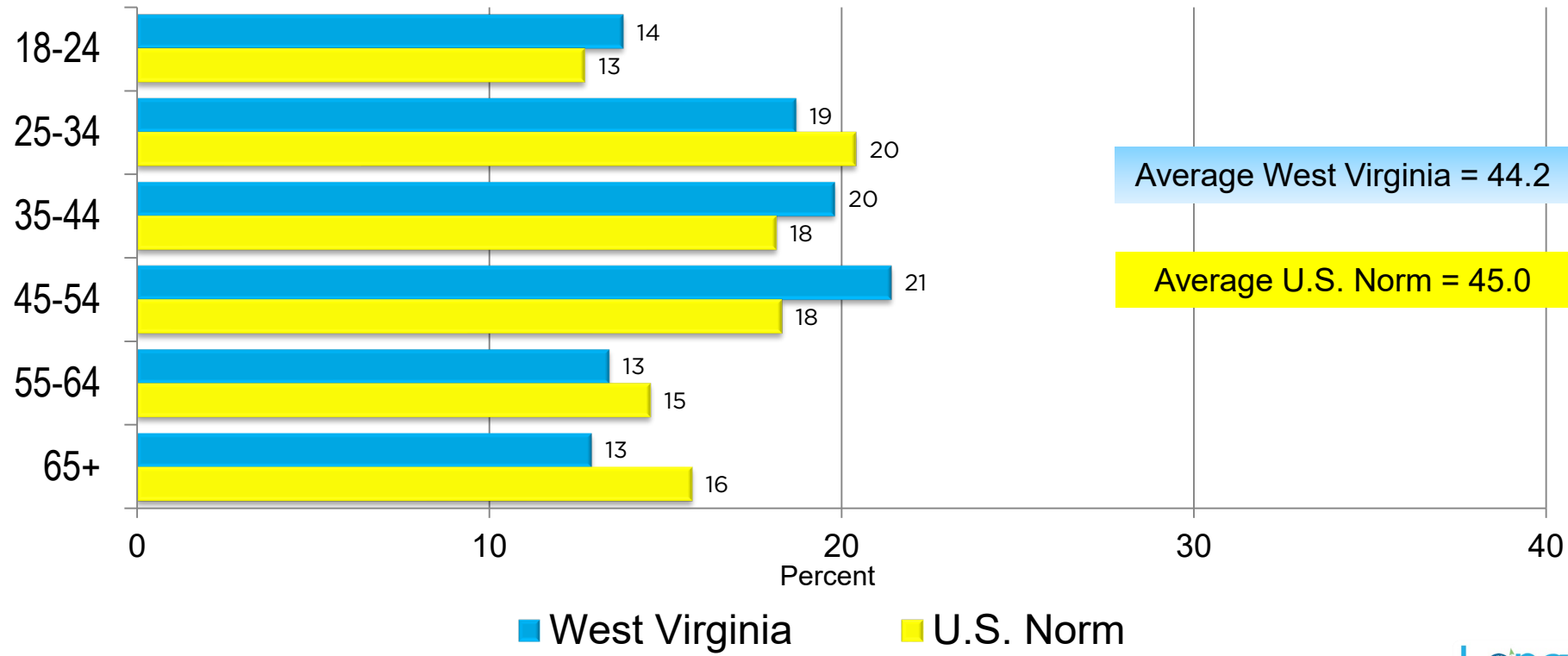


Gender

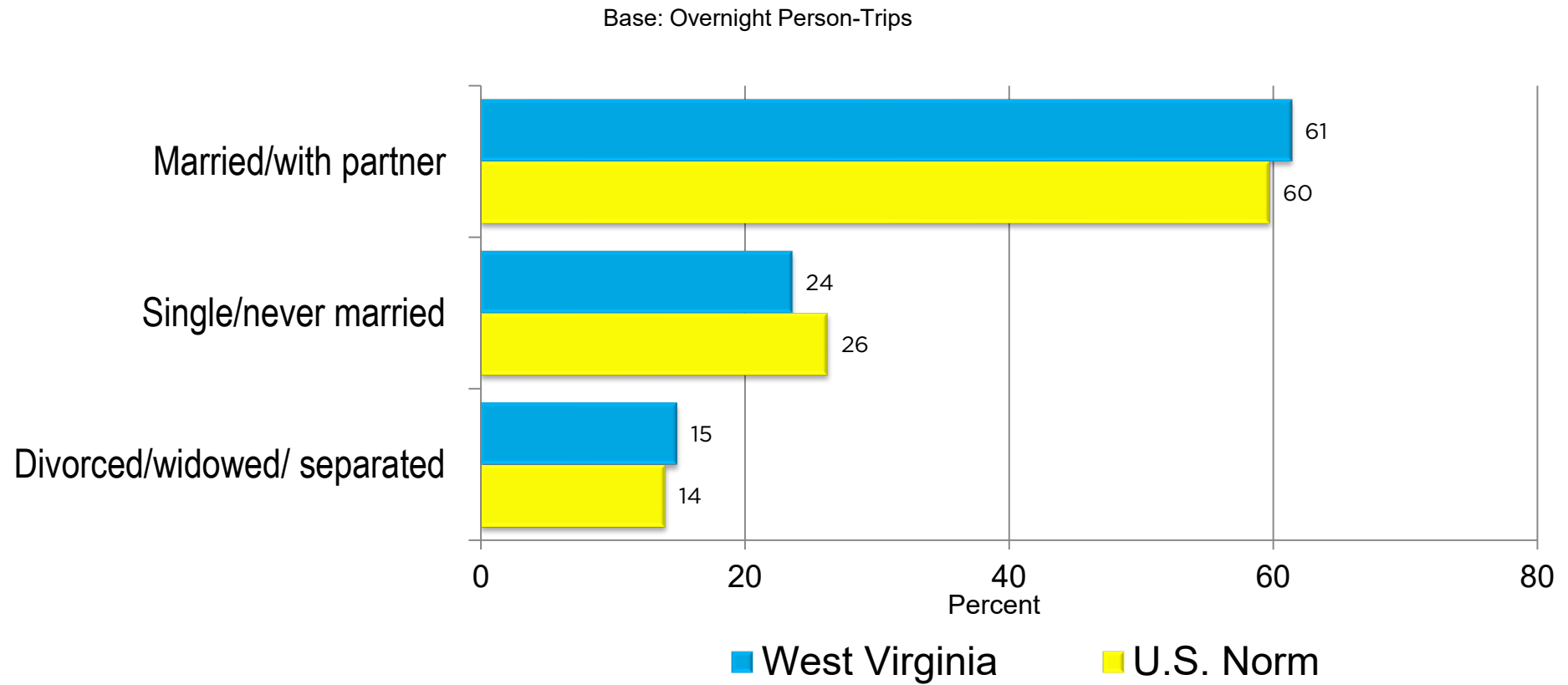


Age

Base: Overnight Person-Trips

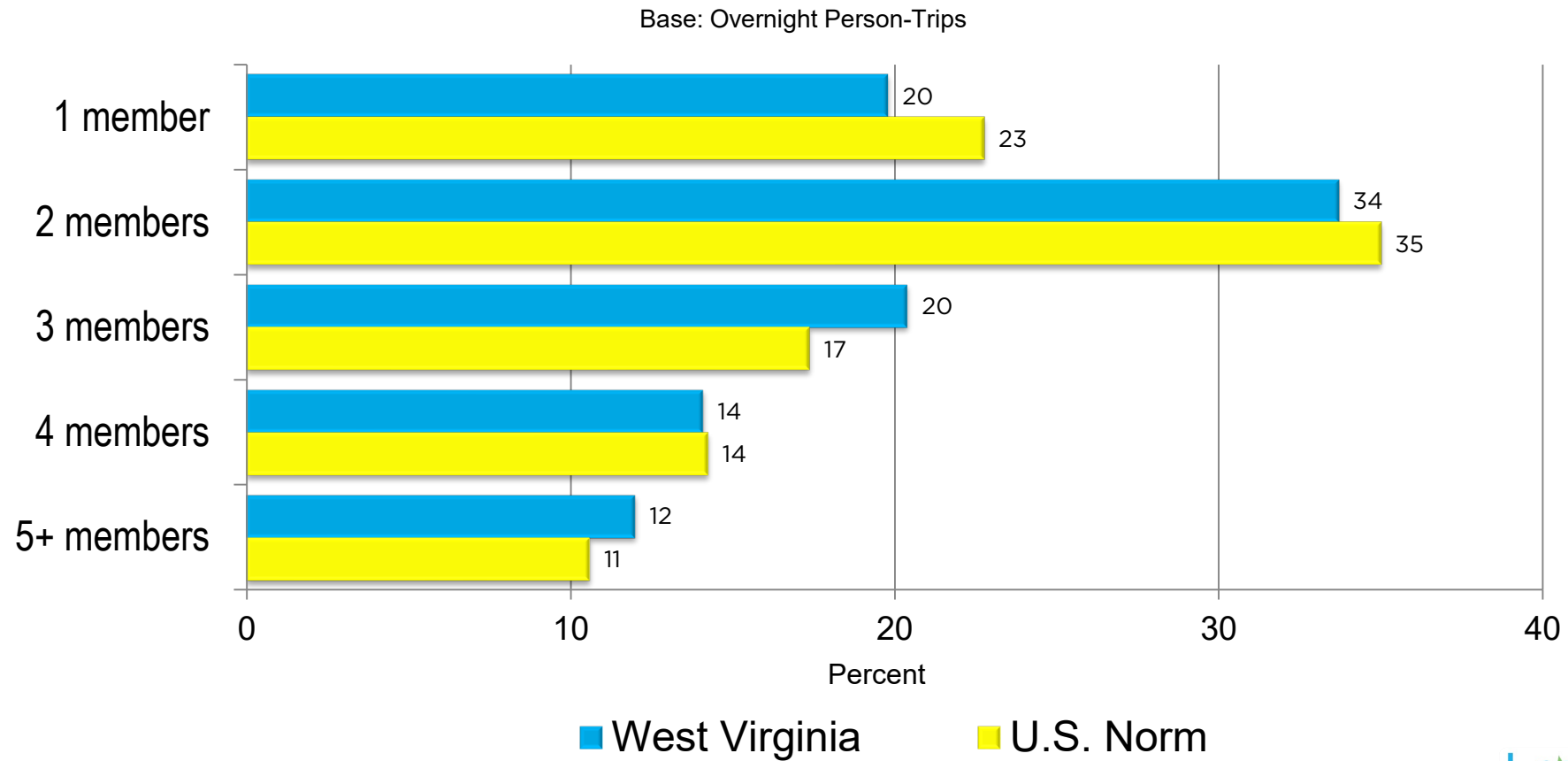


Marital Status



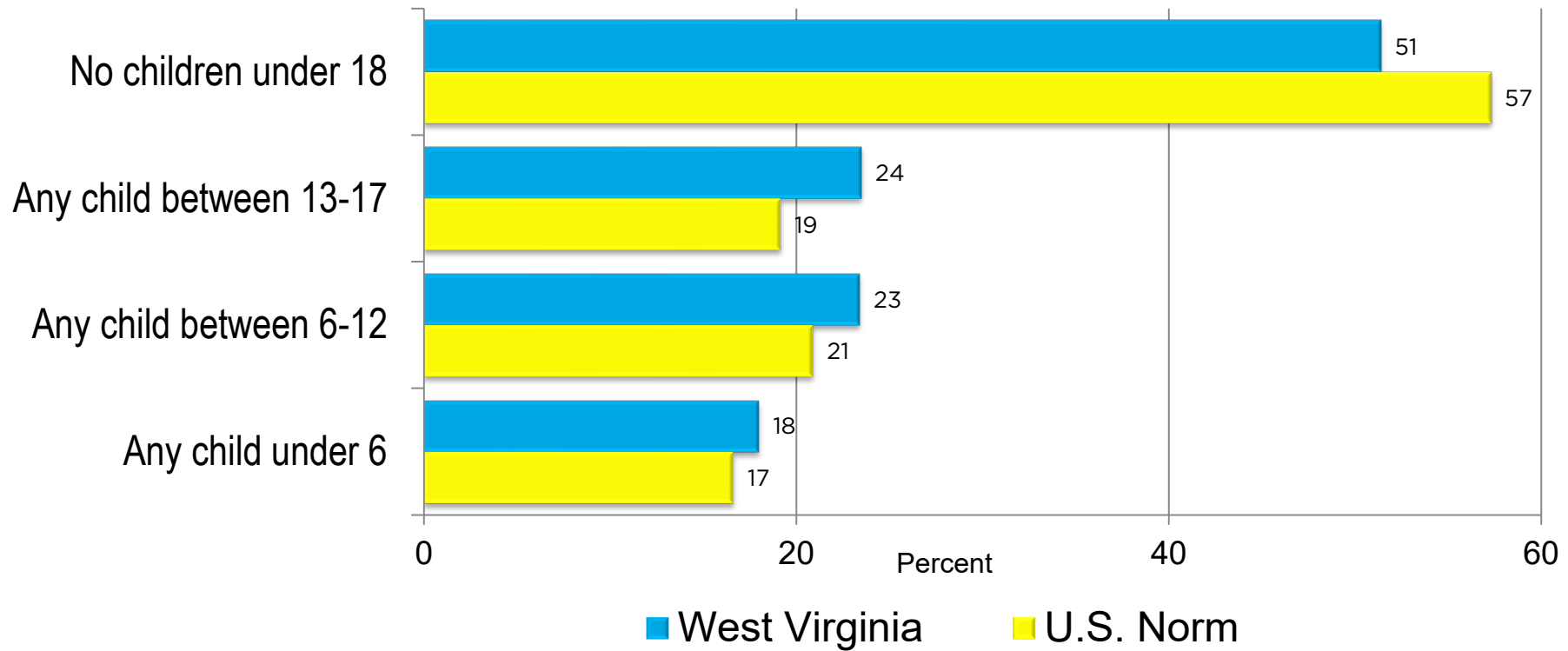
Household Size

Done-CB

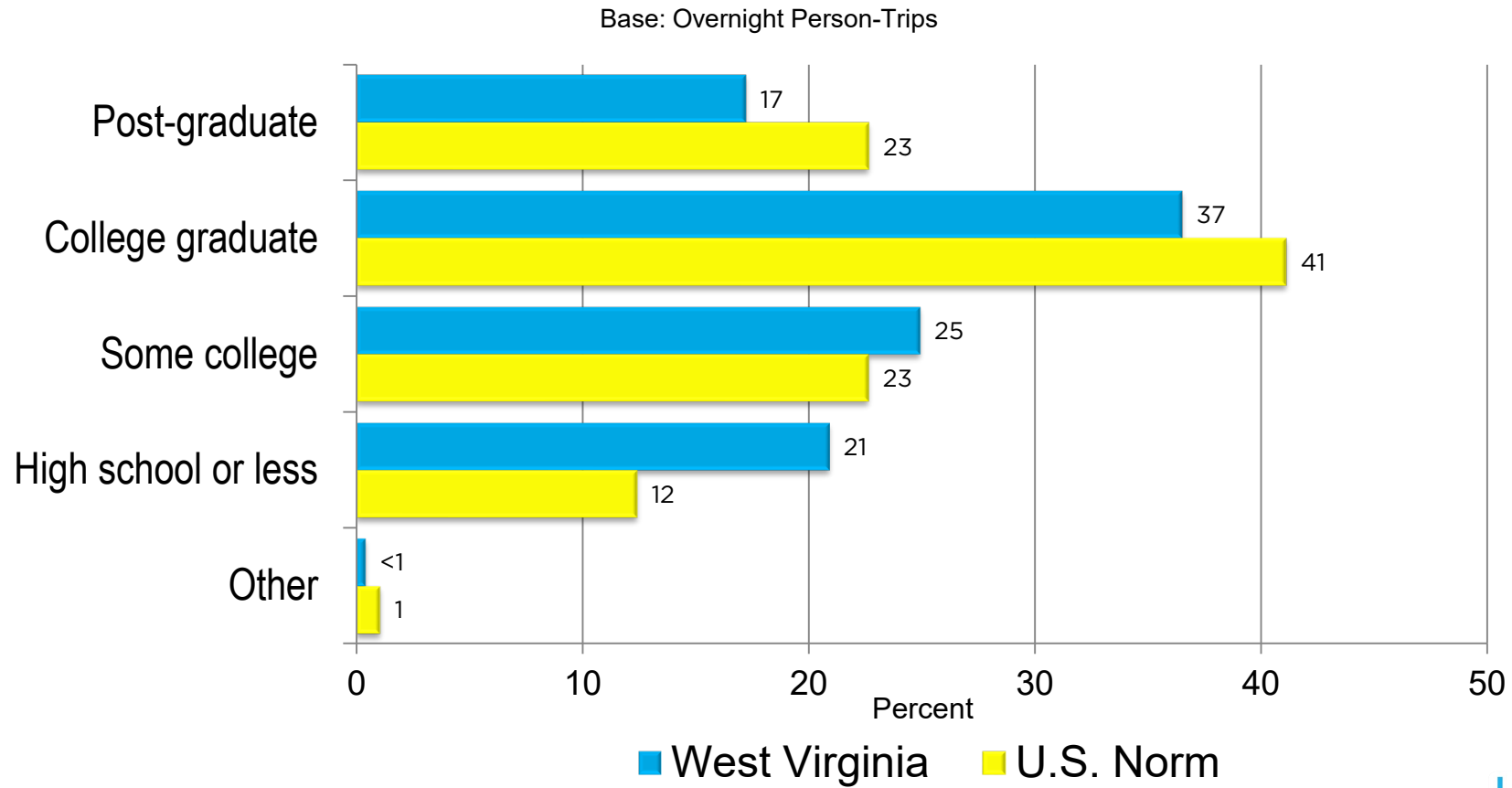


Children in Household

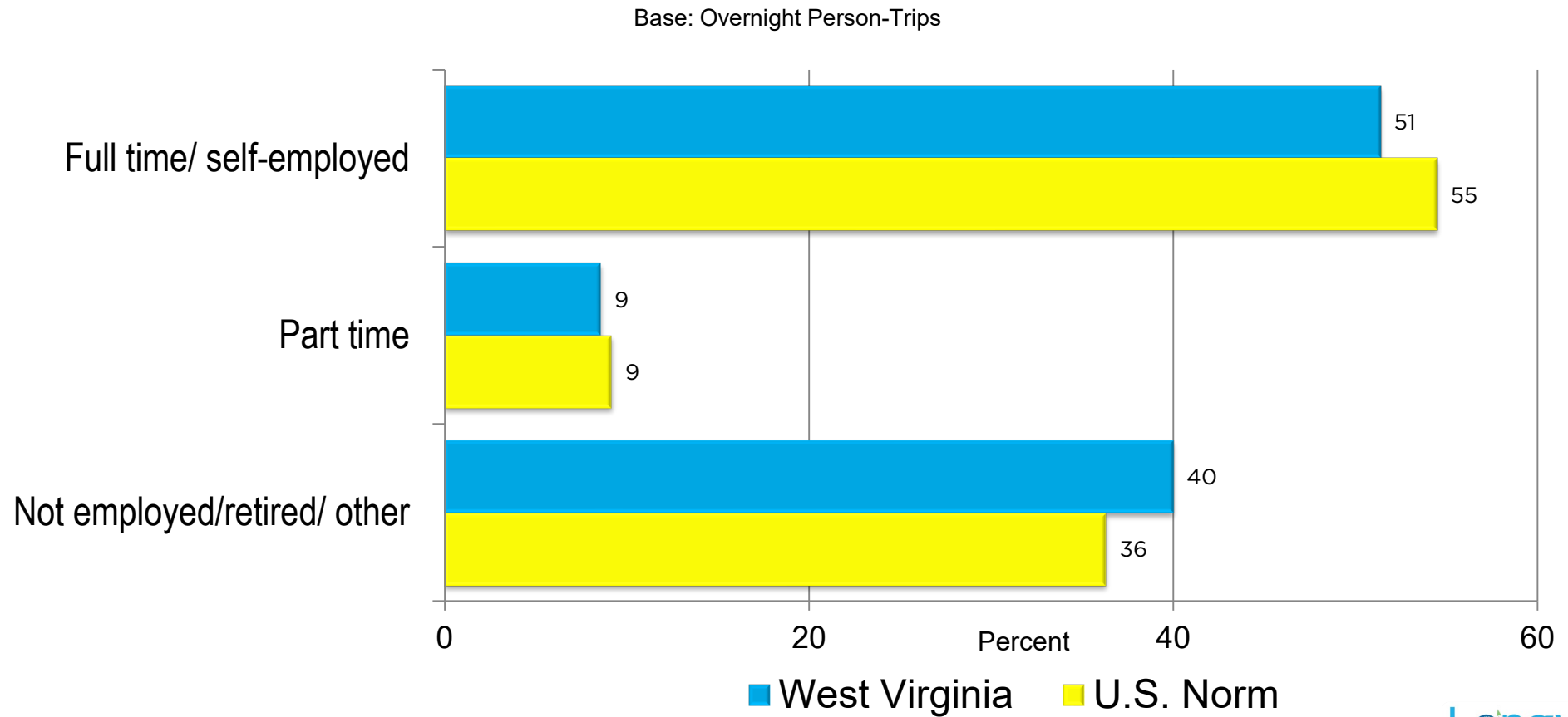
Base: Overnight Person-Trips



Education

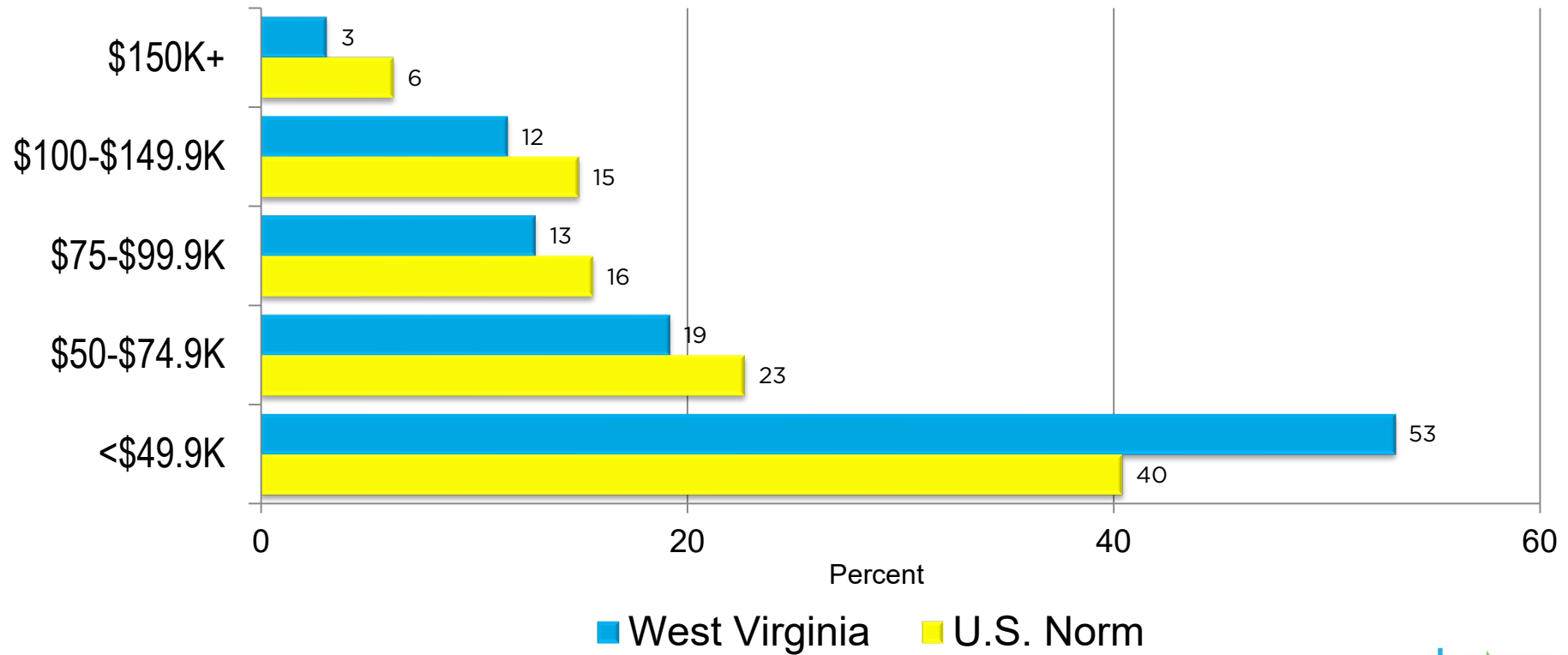


Employment

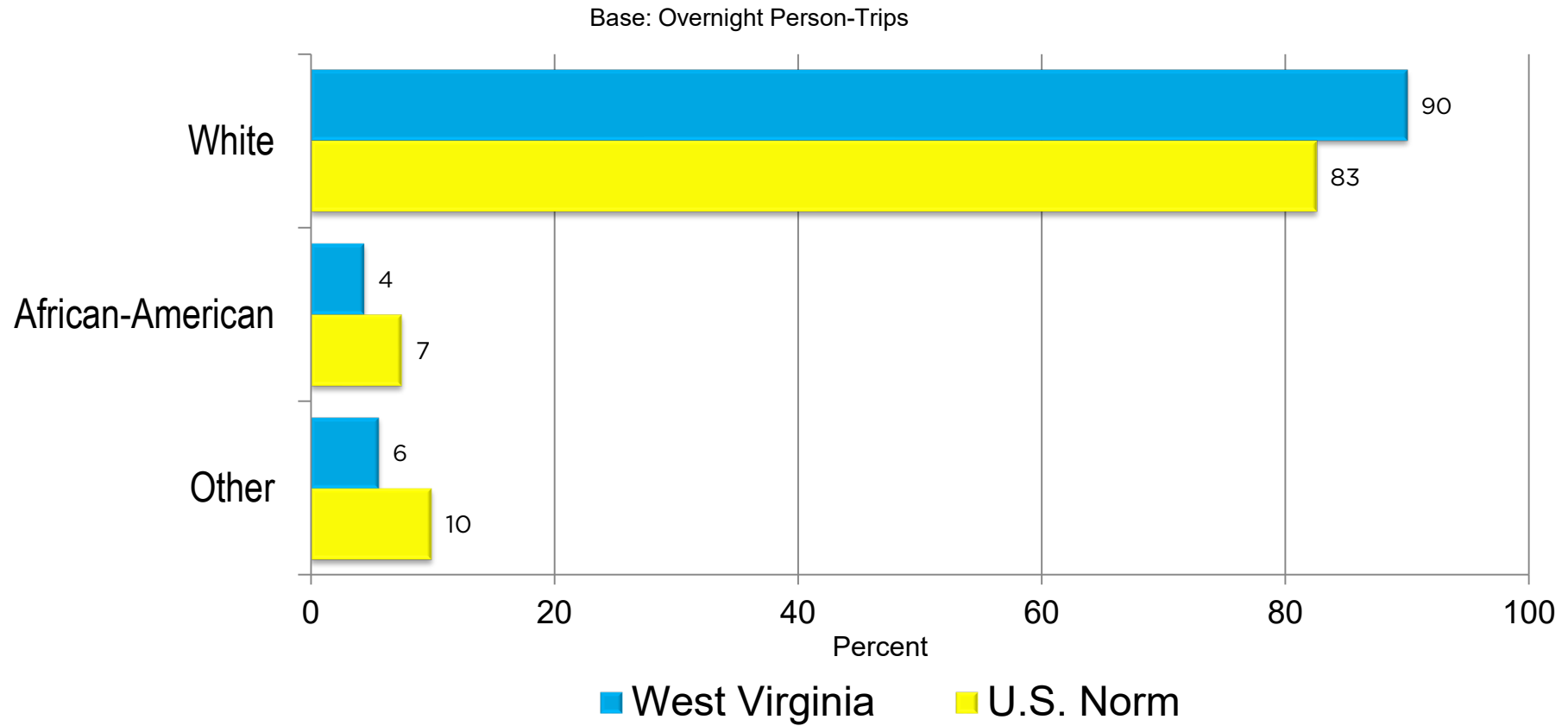


Household Income

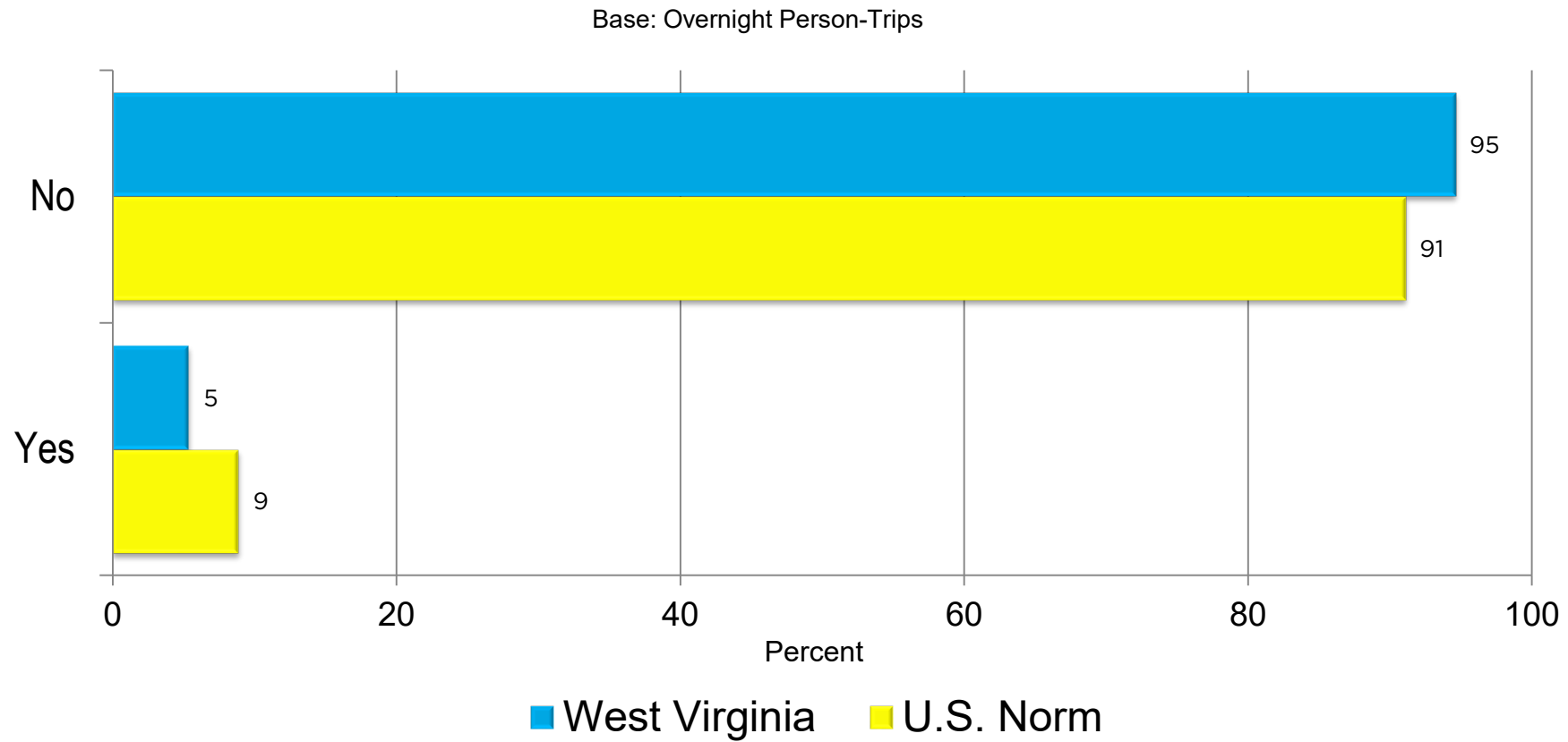
Base: Overnight Person-Trips



Race



Hispanic Background



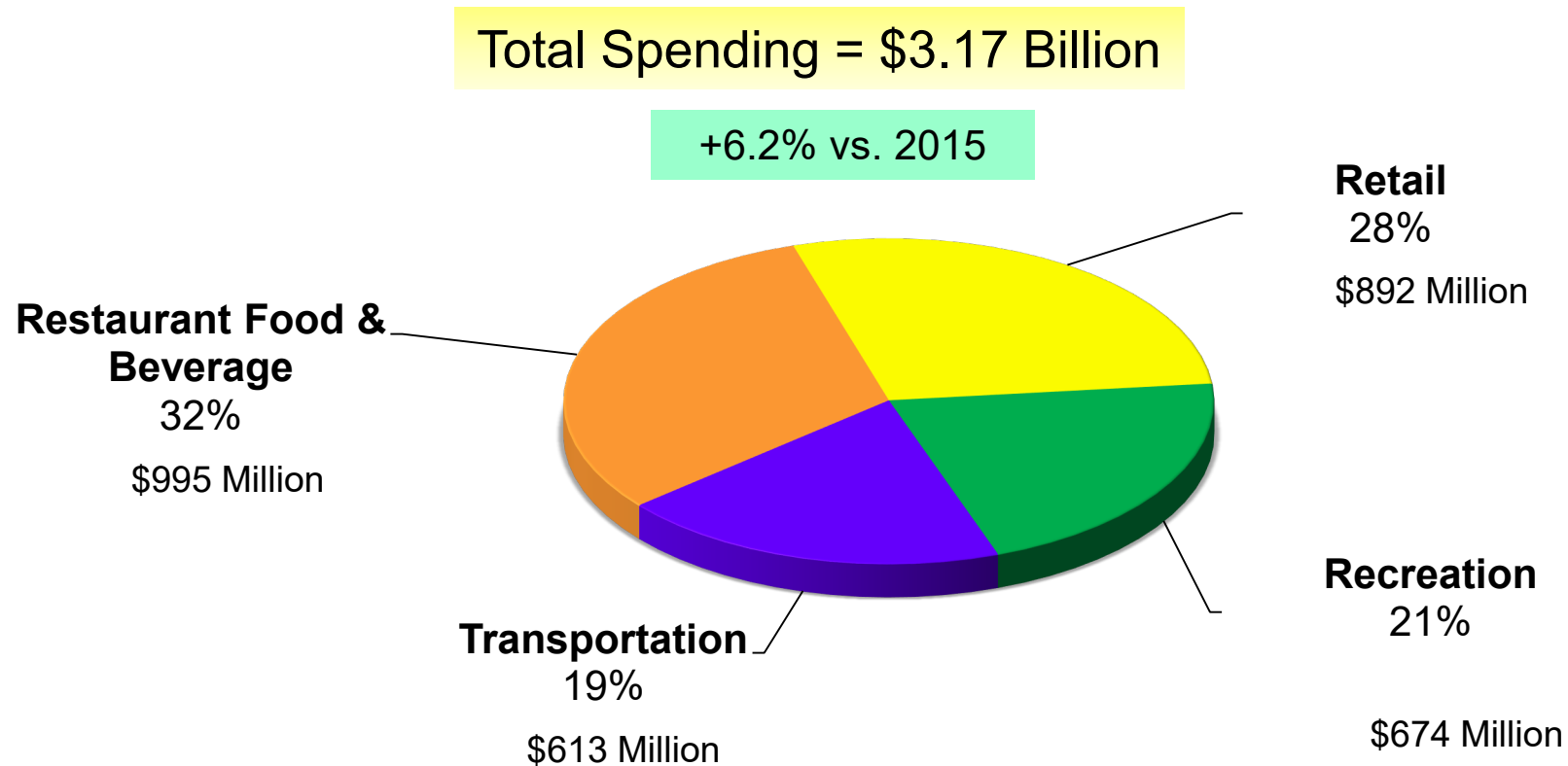


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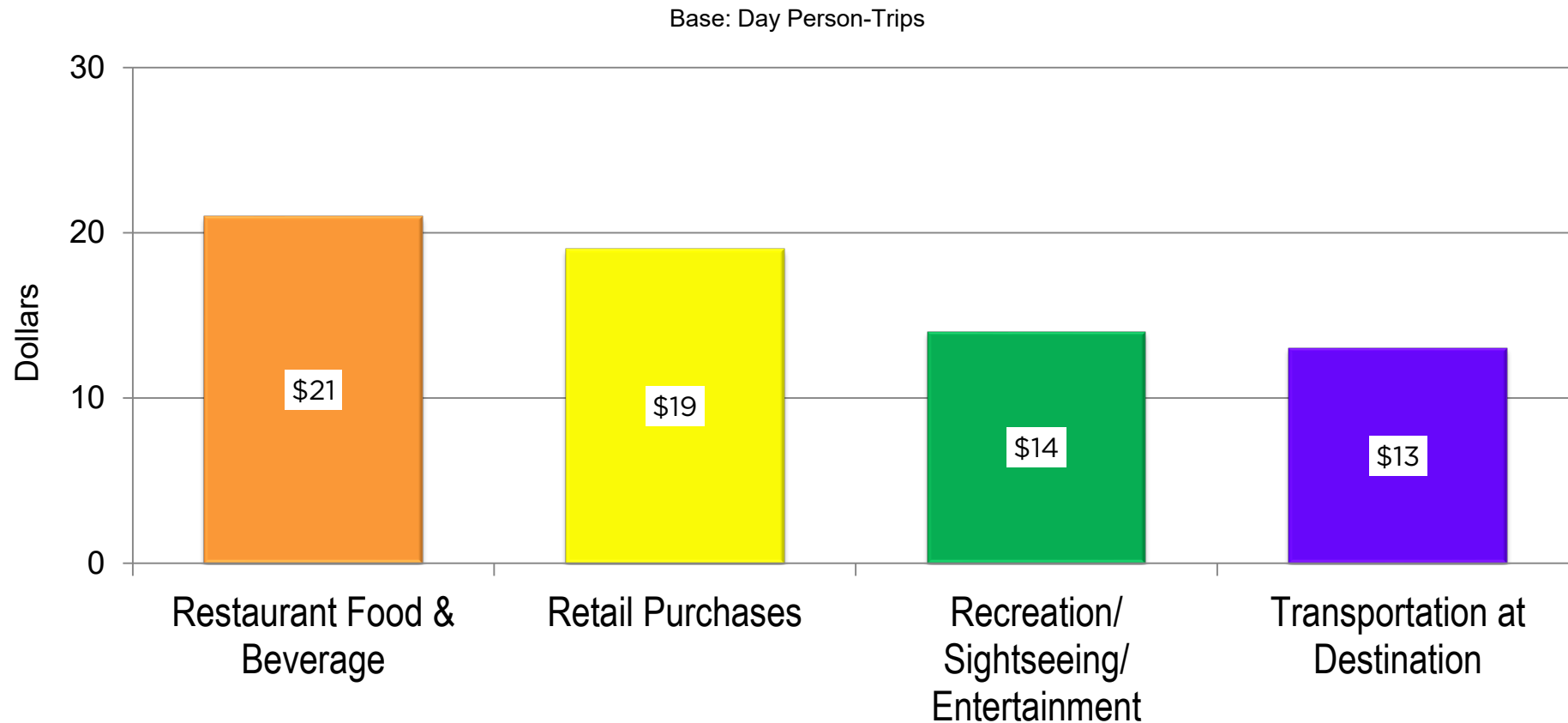
Day Trip Expenditures



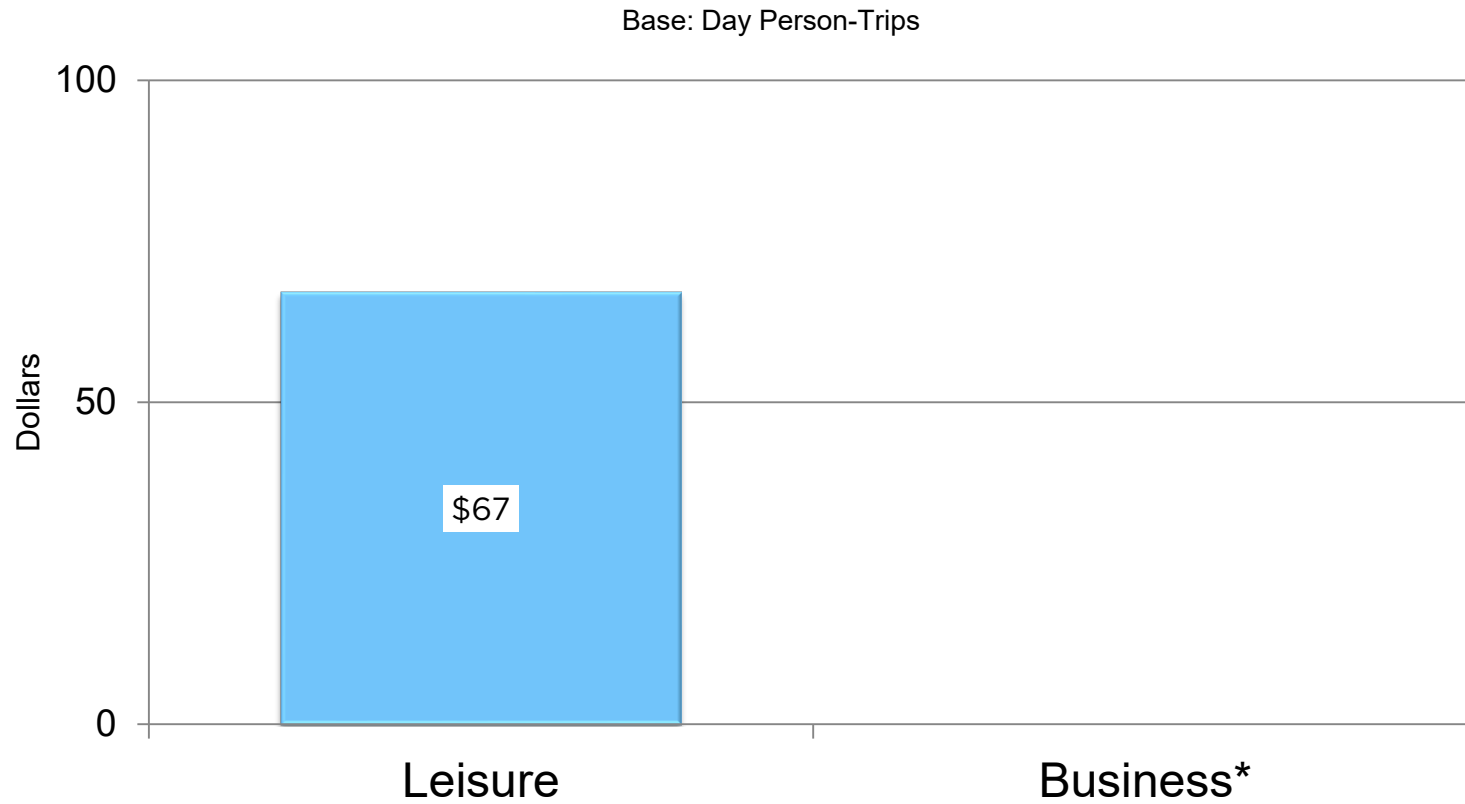
Total West Virginia Domestic Day Trip Spending — by Sector



Average Per Person Expenditures on Day Trips — By Sector



Average Per Person Expenditures on Day Trips — by Trip Purpose

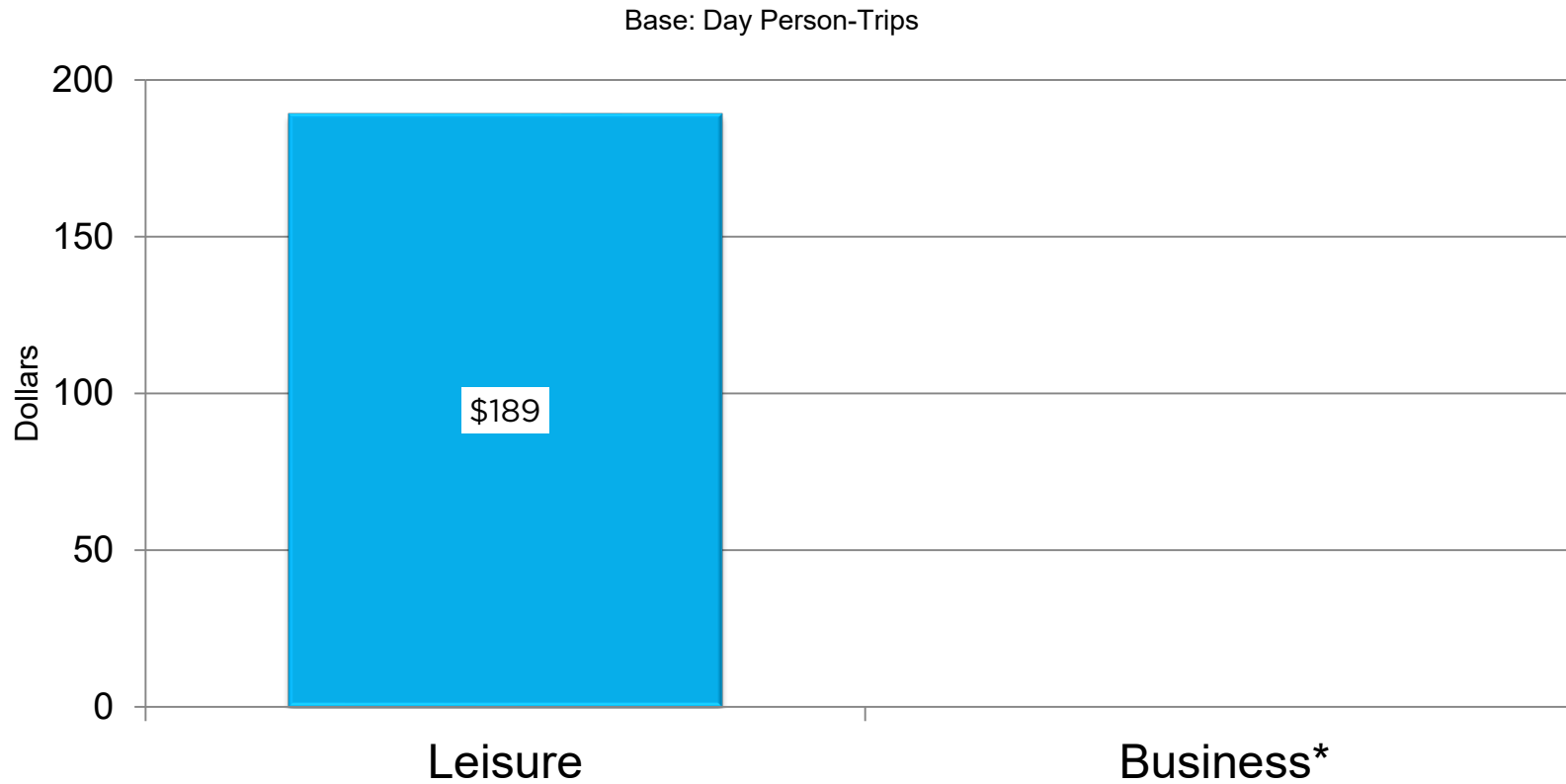


* Low base sizes

Average Per Party Expenditures on Day Trips — By Sector



Average Per Party Expenditures on Day Trip — by Trip Purpose



* Low base sizes

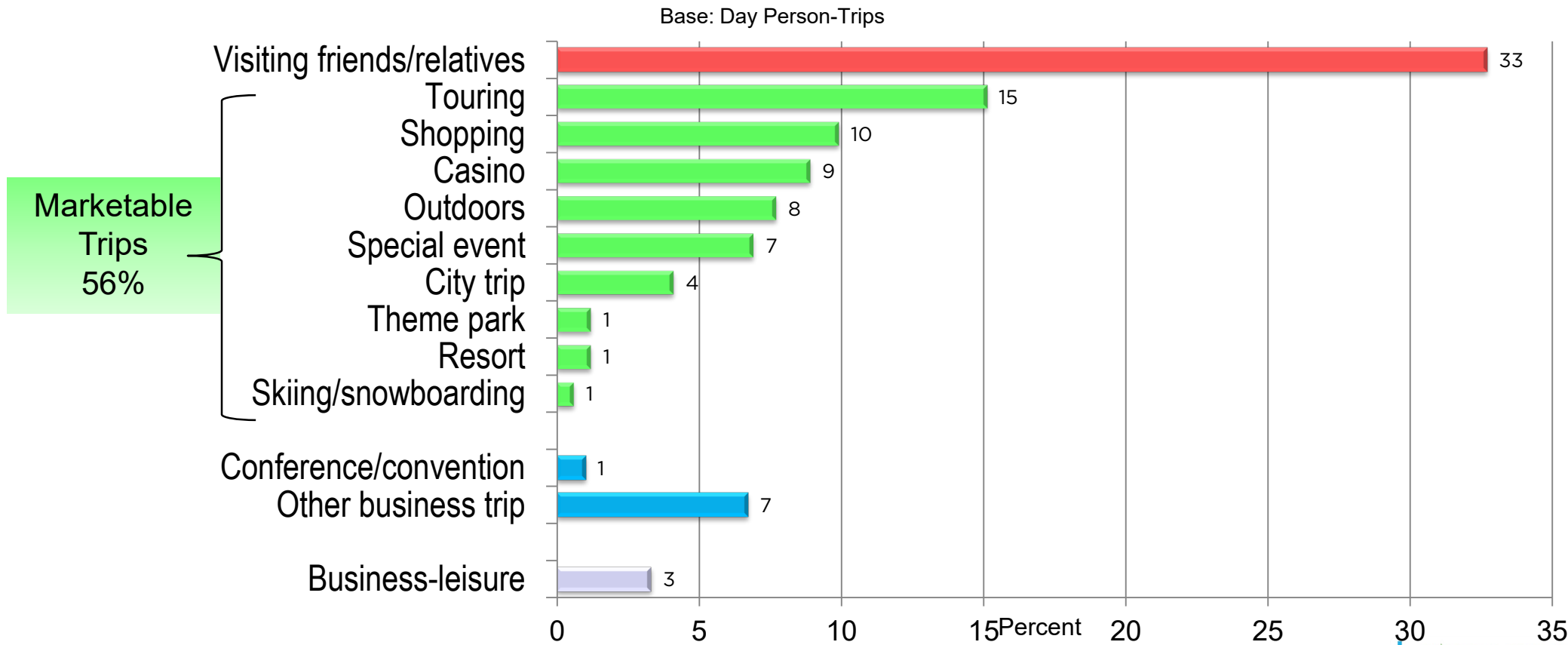


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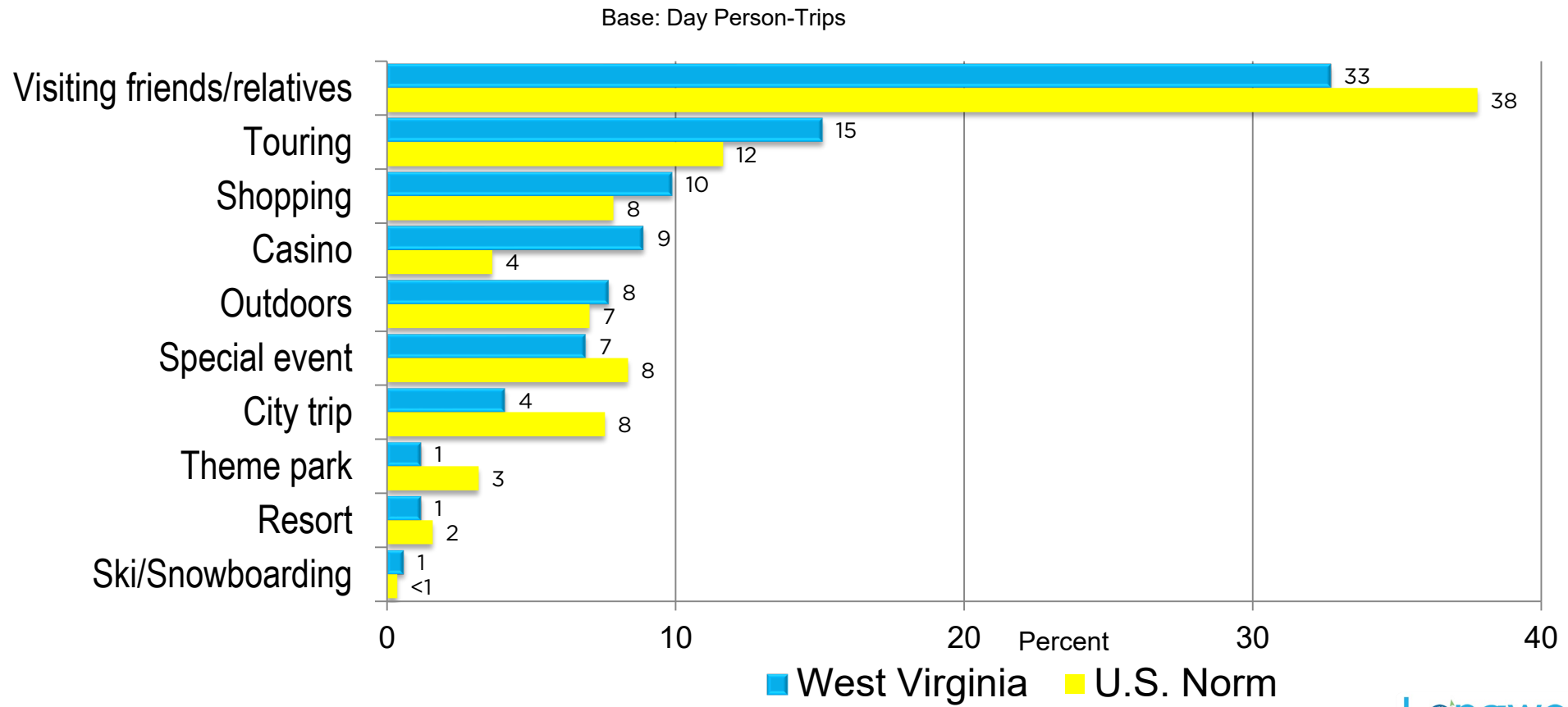
Day Trip Characteristics



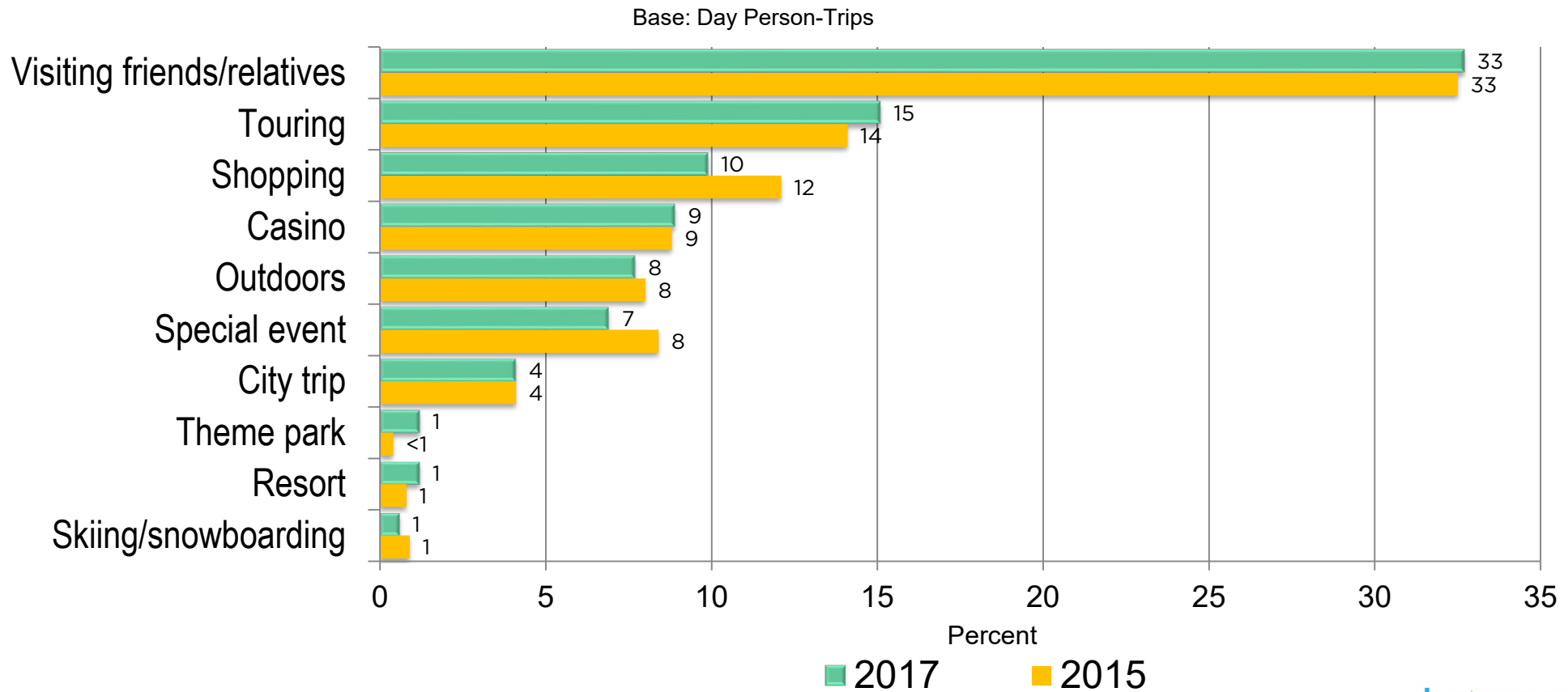
Main Purpose of Trip



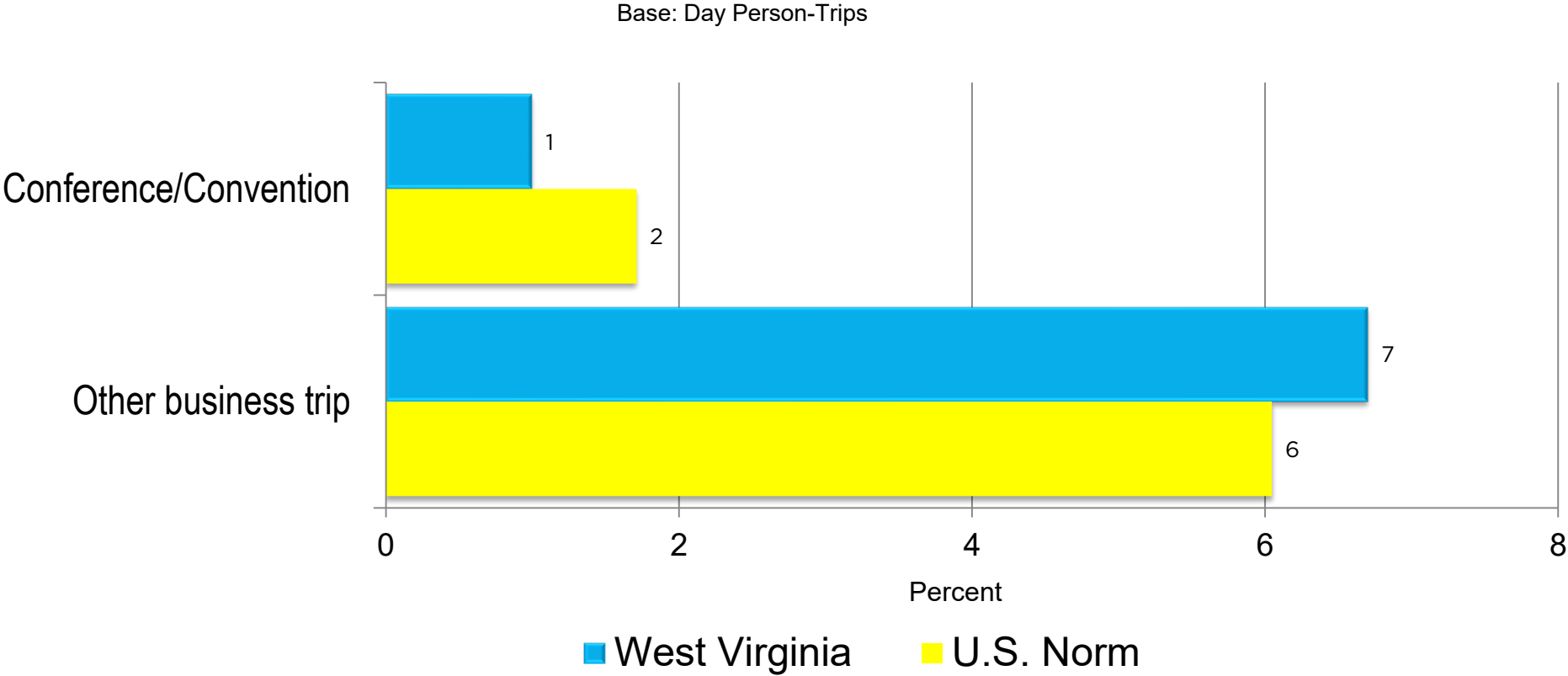
Main Purpose of Leisure Trip — West Virginia vs. National Norm



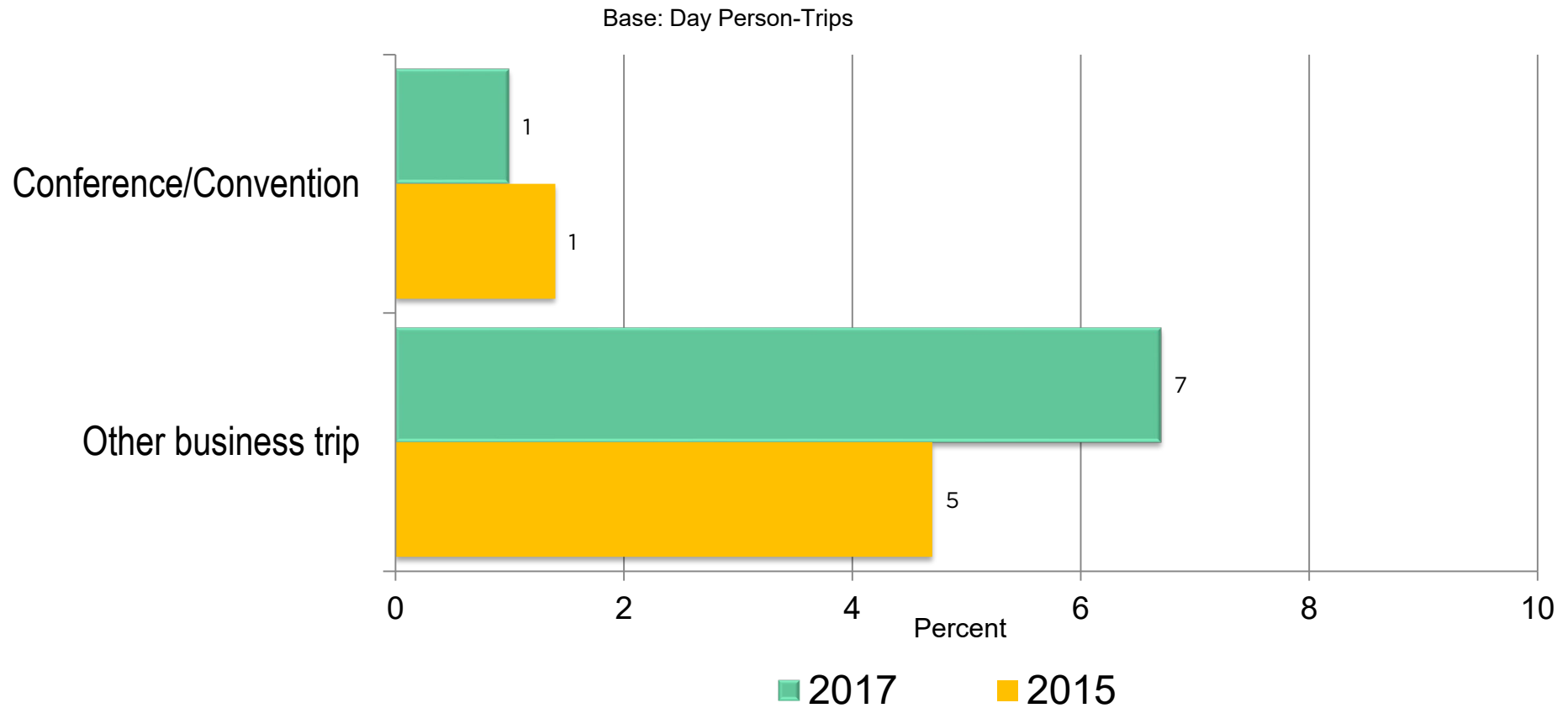
Main Purpose of Day Leisure Trip — 2017 vs. 2015



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

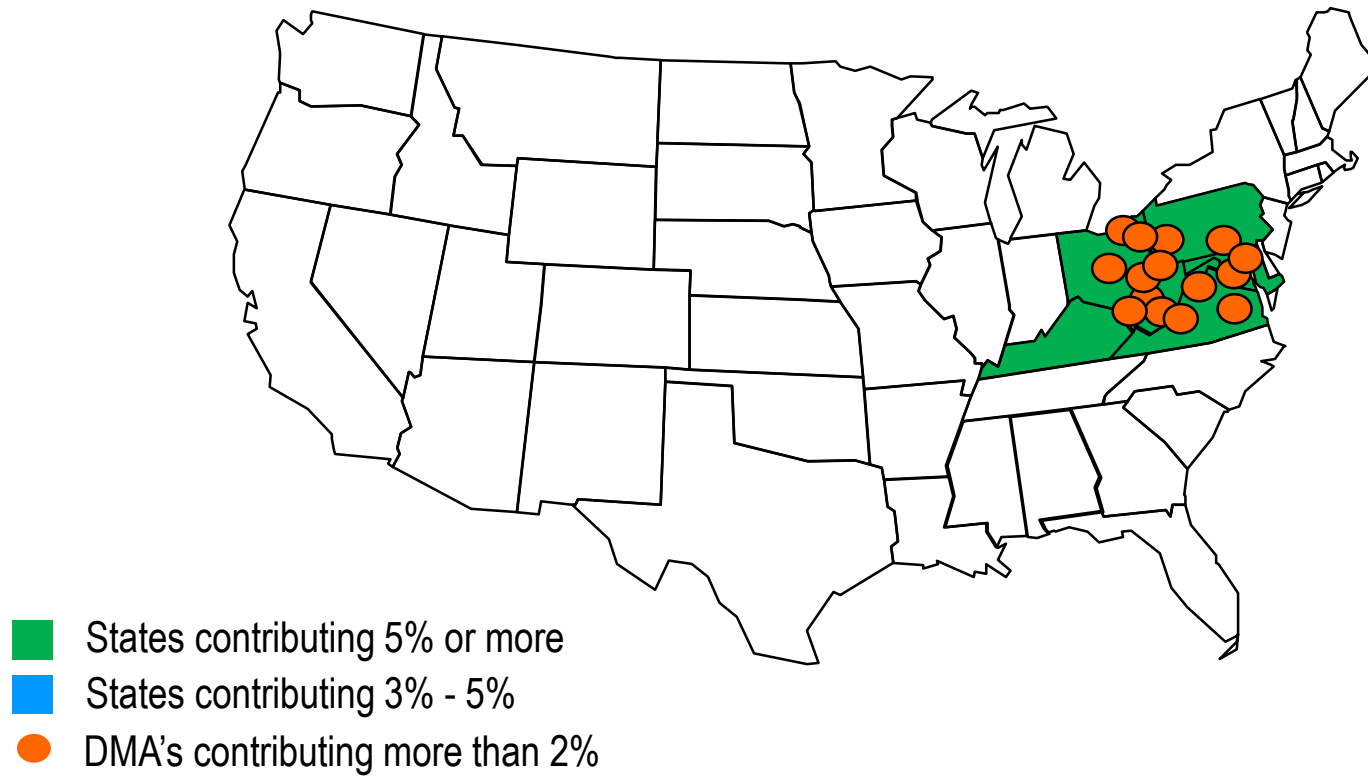


Main Purpose of Day Business Trip — 2017 vs. 2015

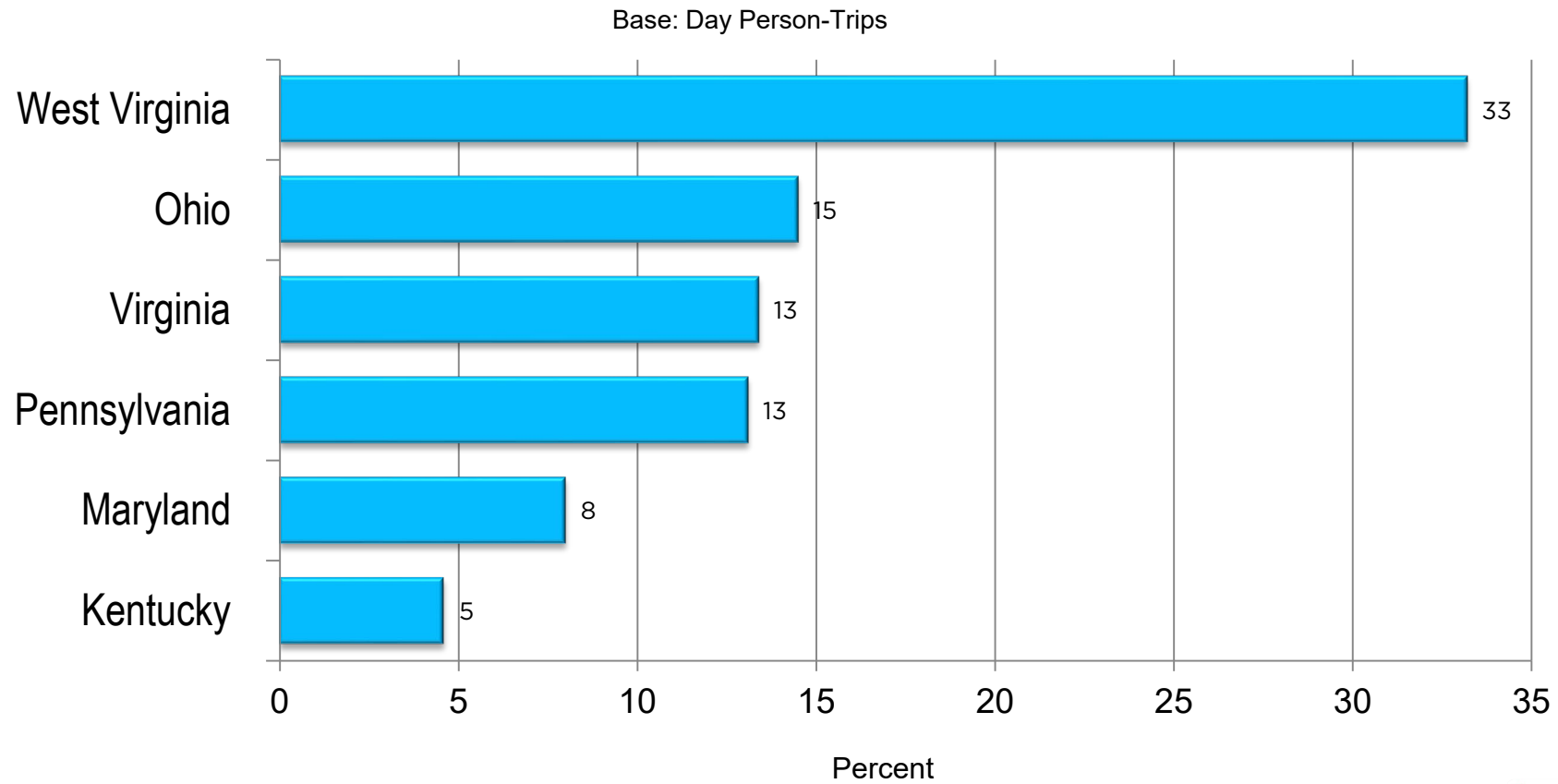


Sources of Business

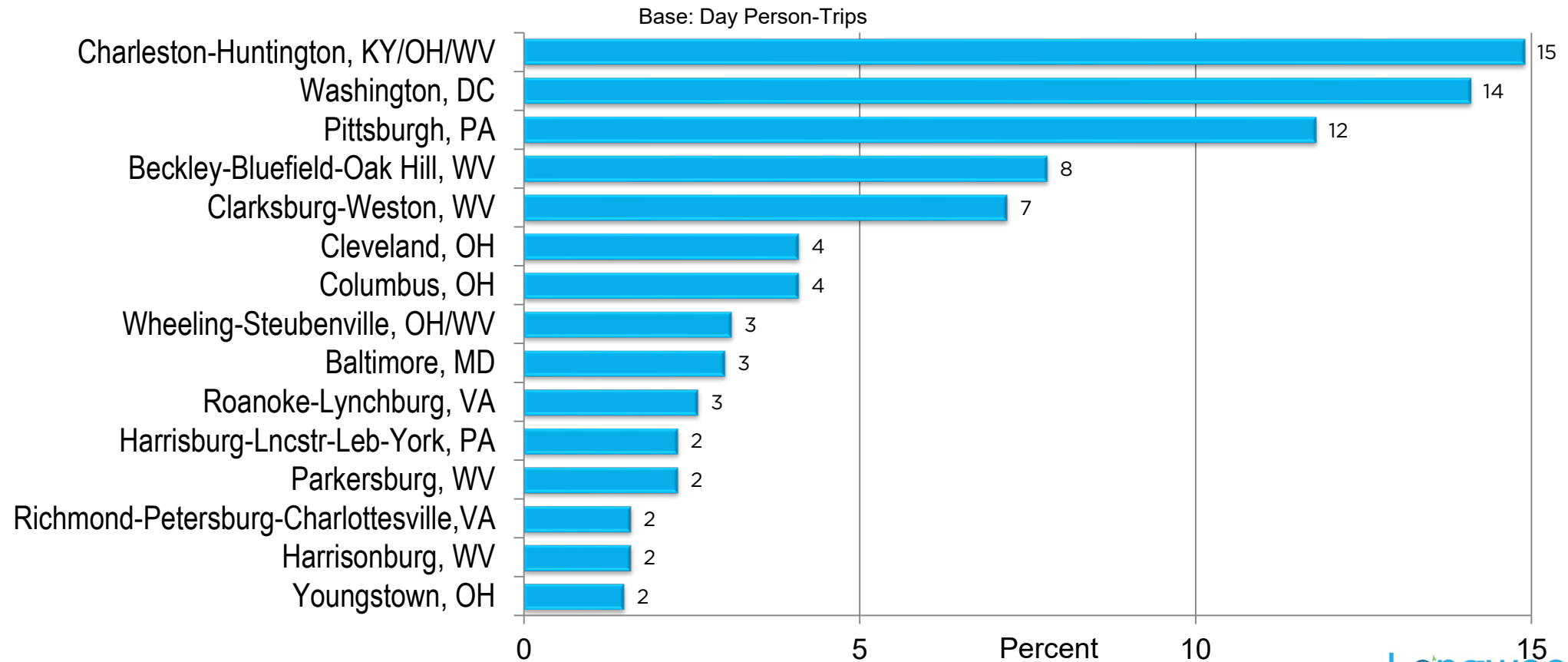
Base: Day Person-Trips



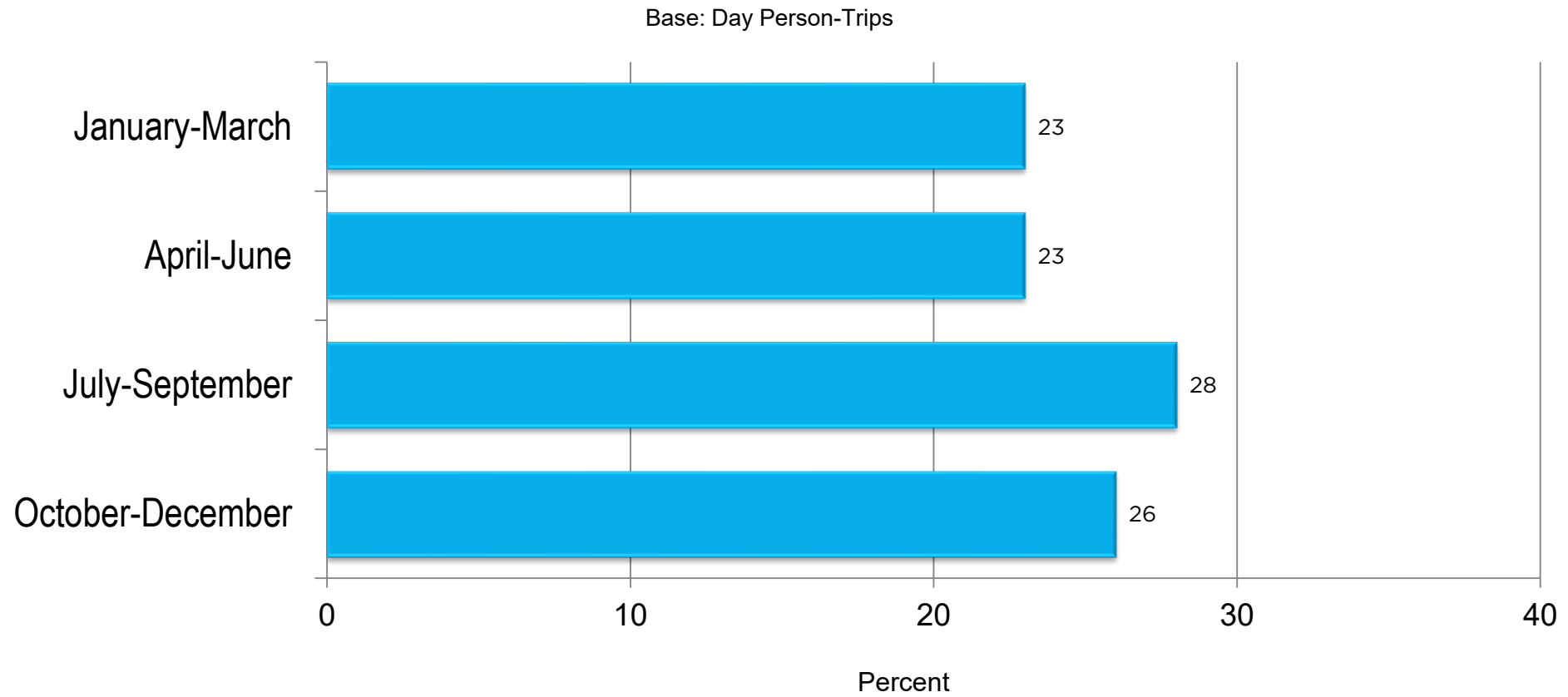
State Origin Of Trip



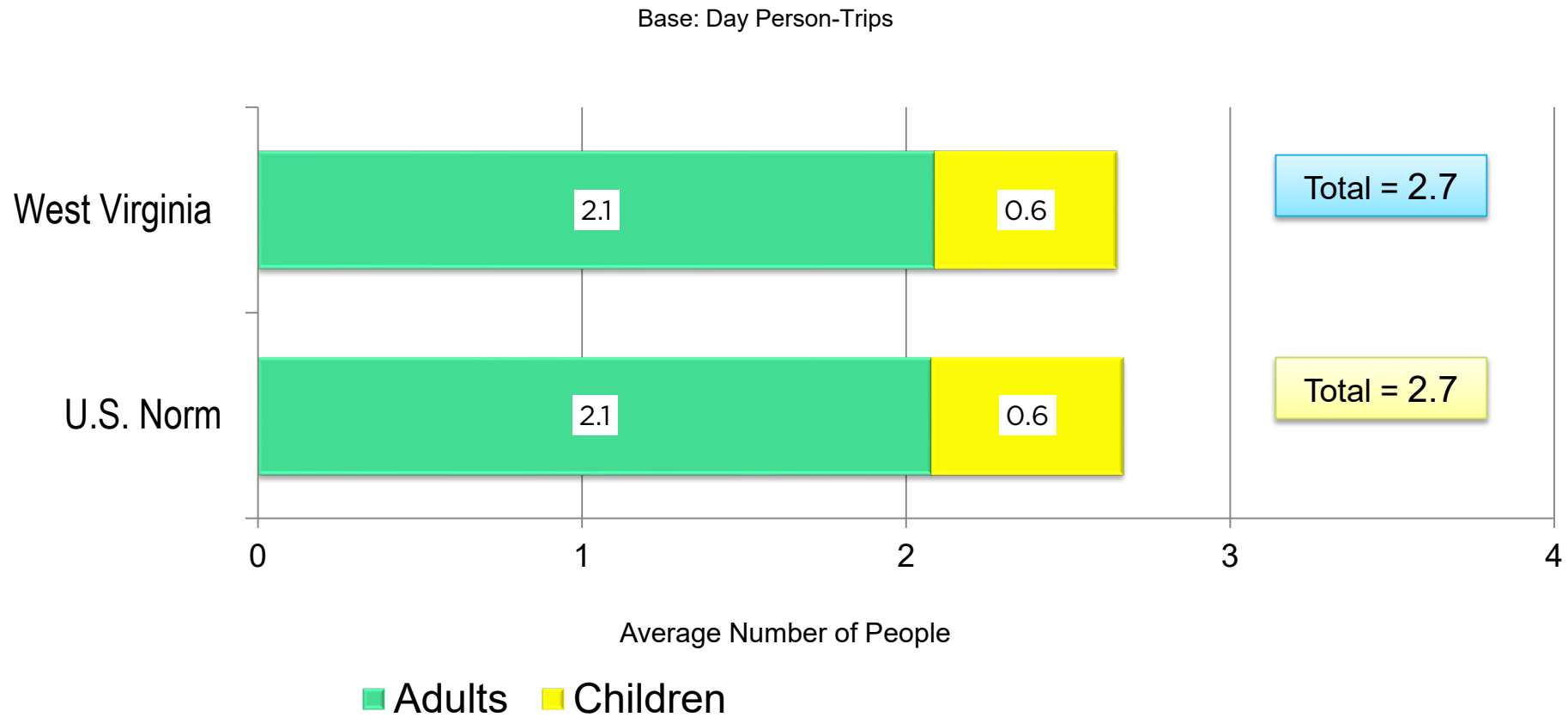
DMA Origin Of Trip



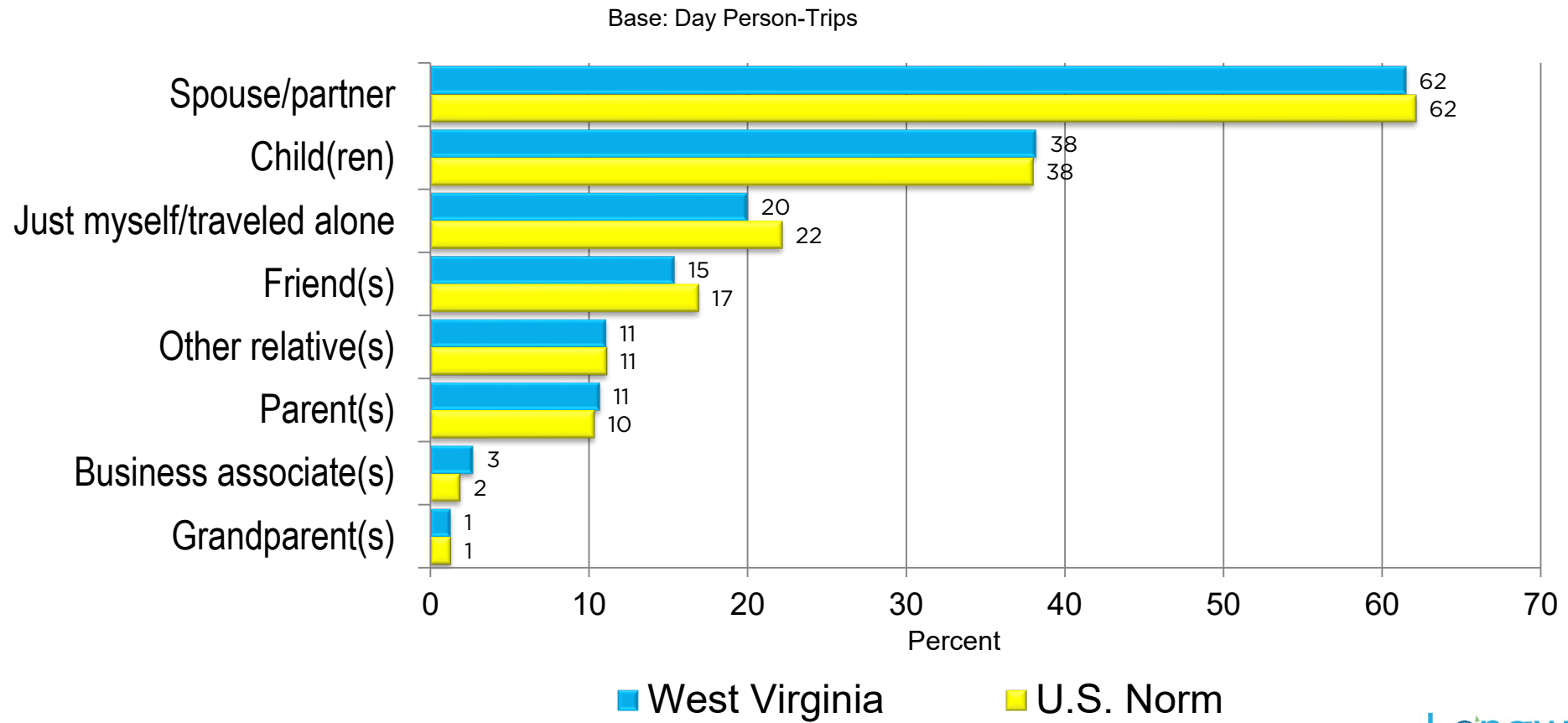
Season of Trip



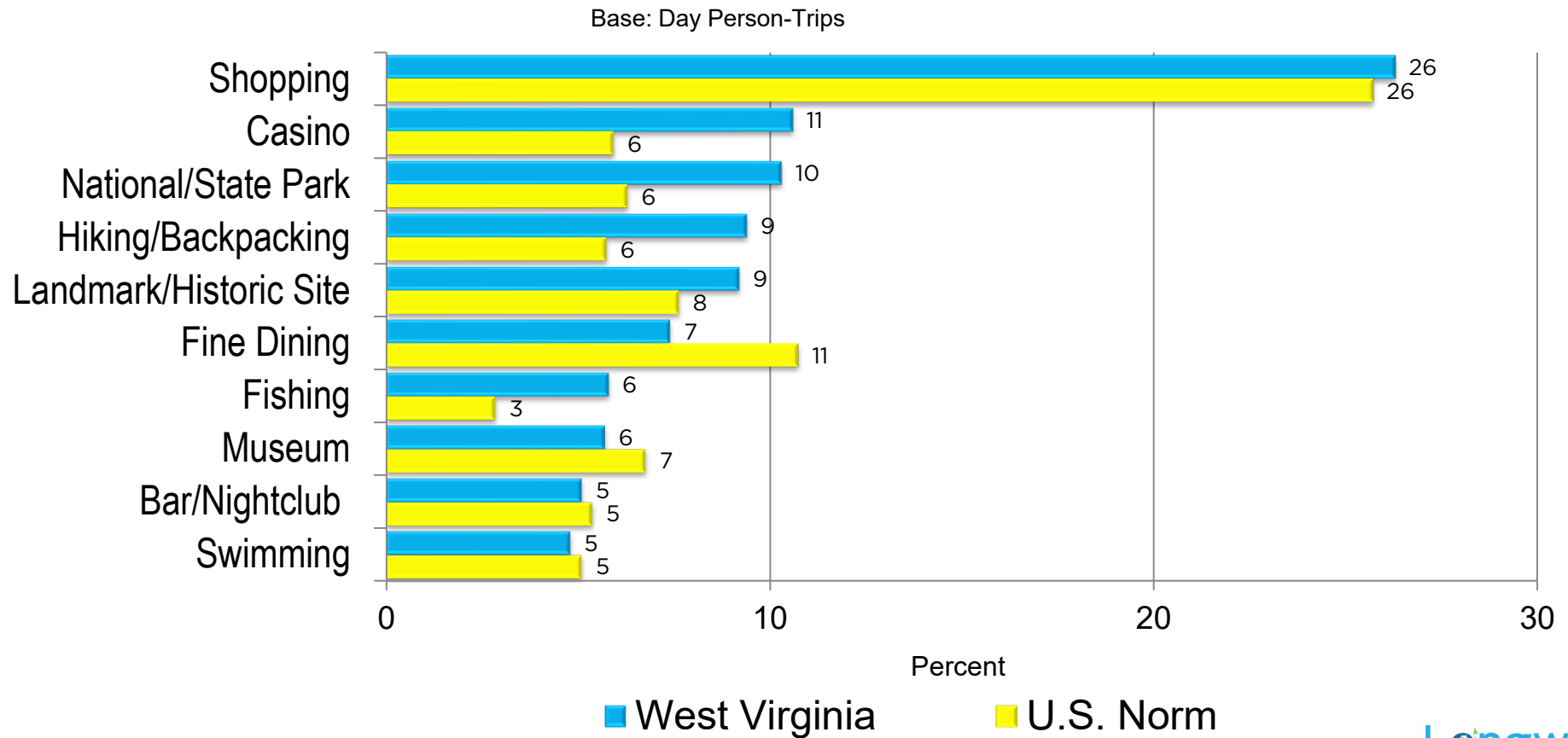
Size of Travel Party



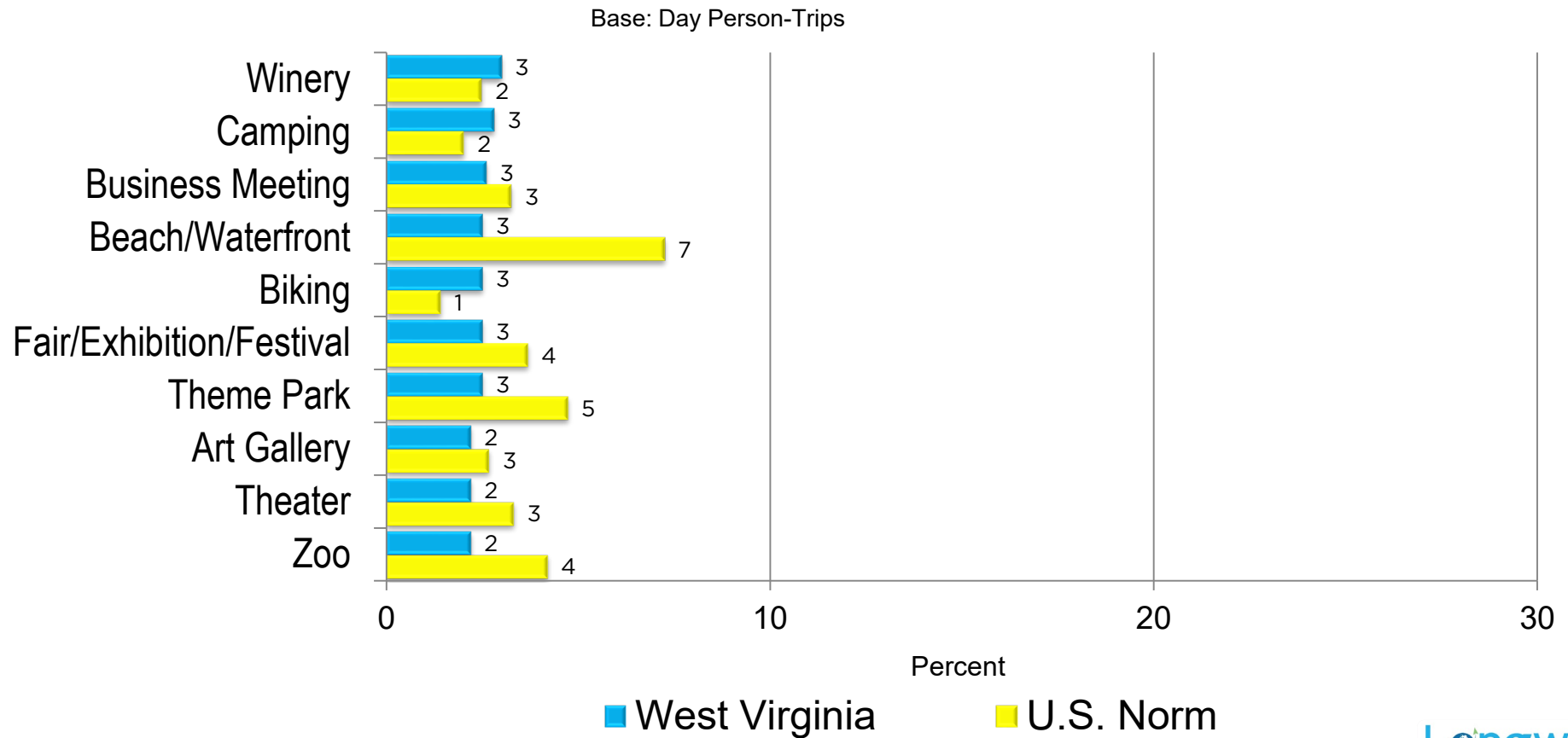
Composition of Immediate Travel Party



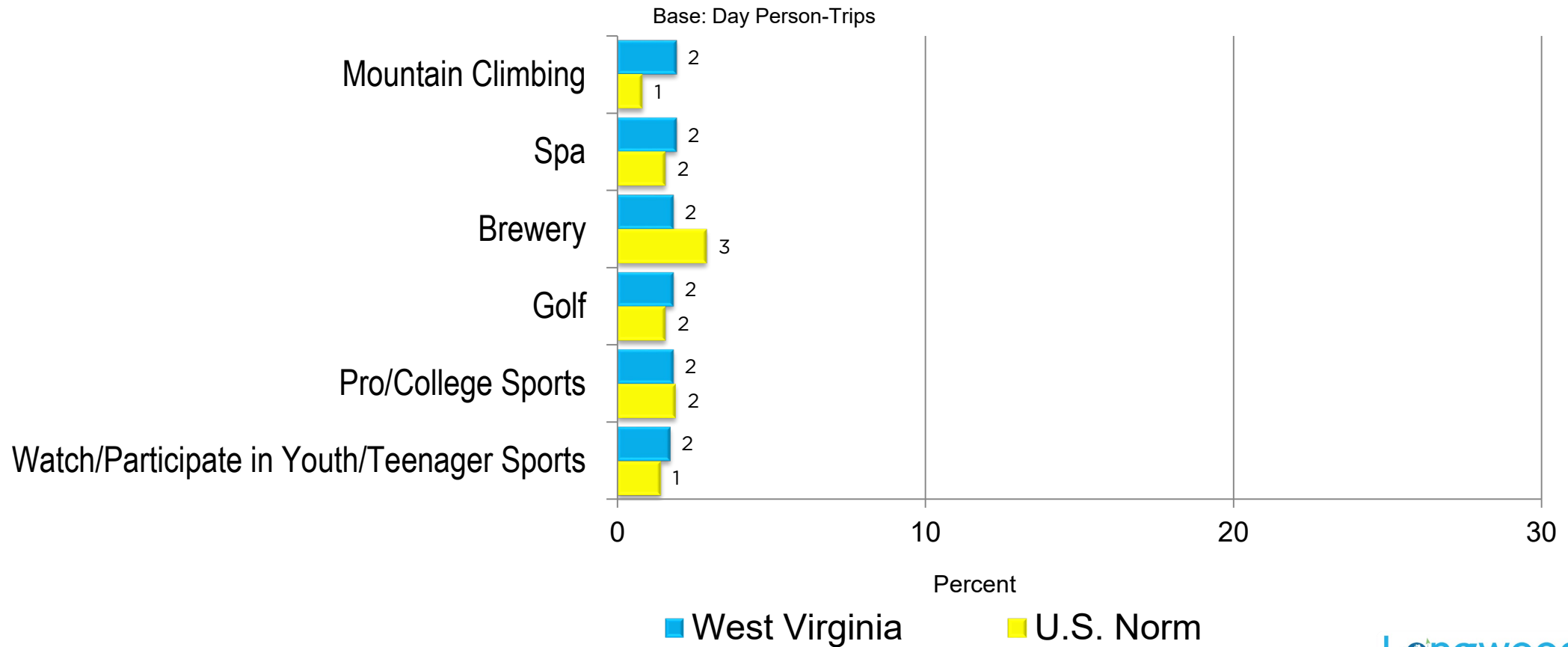
Activities and Experiences



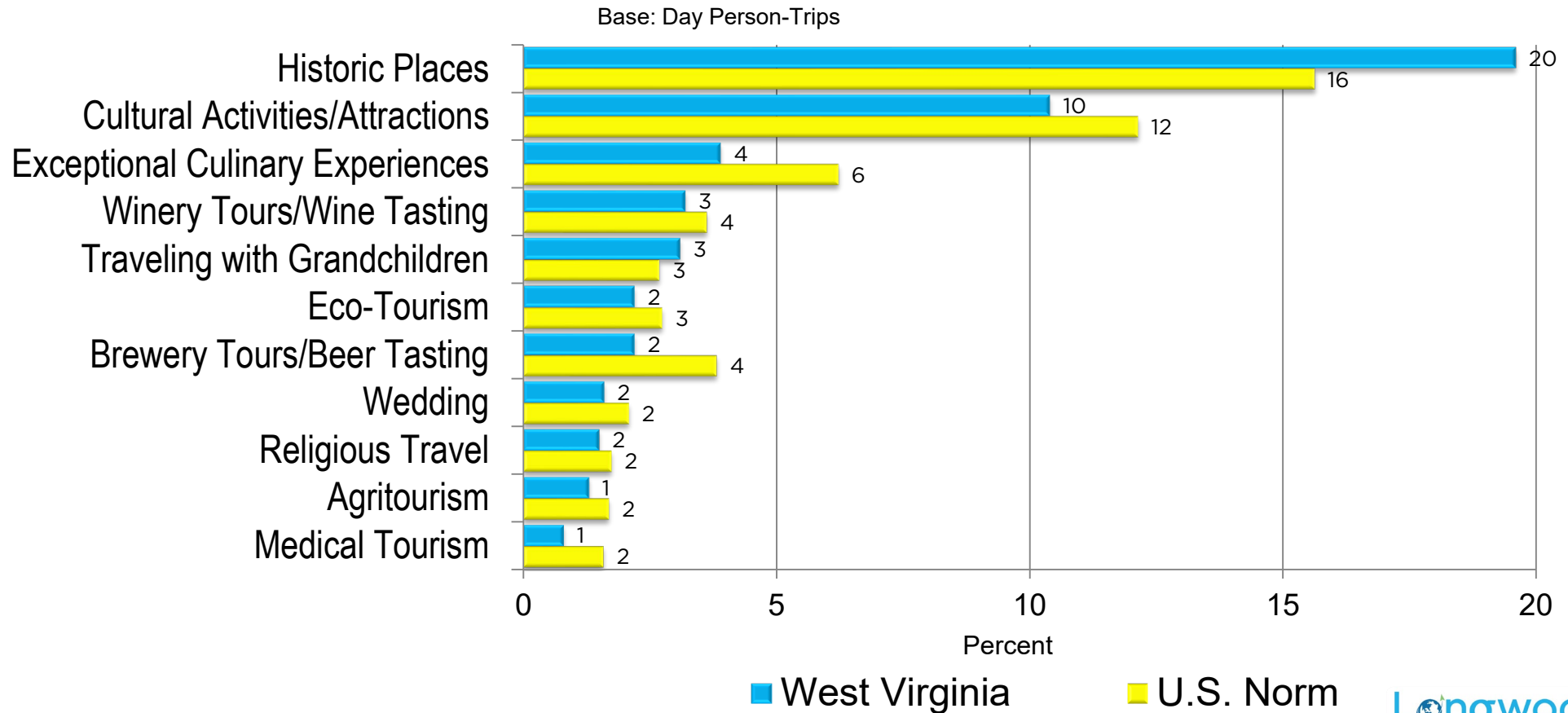
Activities and Experiences (Cont'd)



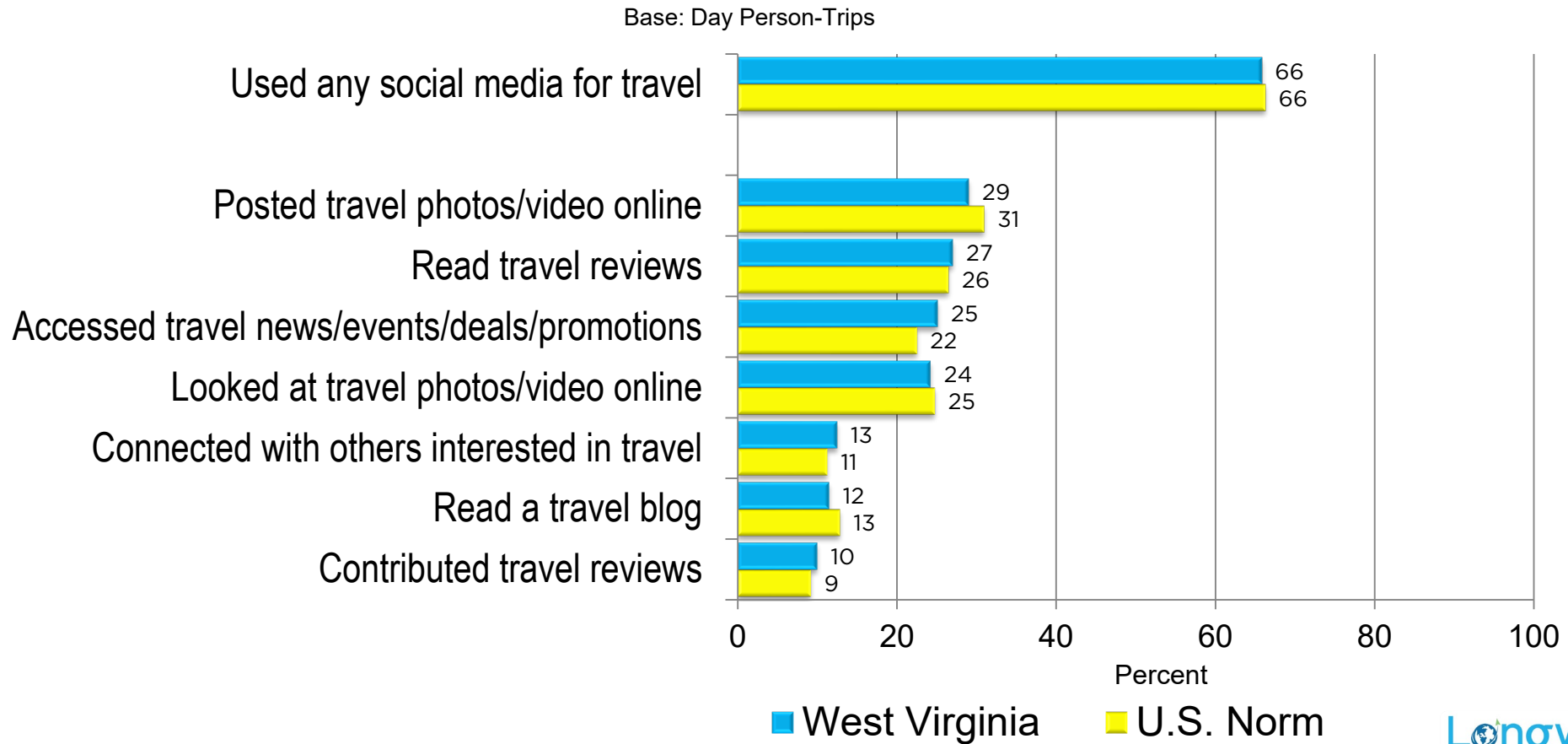
Activities and Experiences (Cont'd)



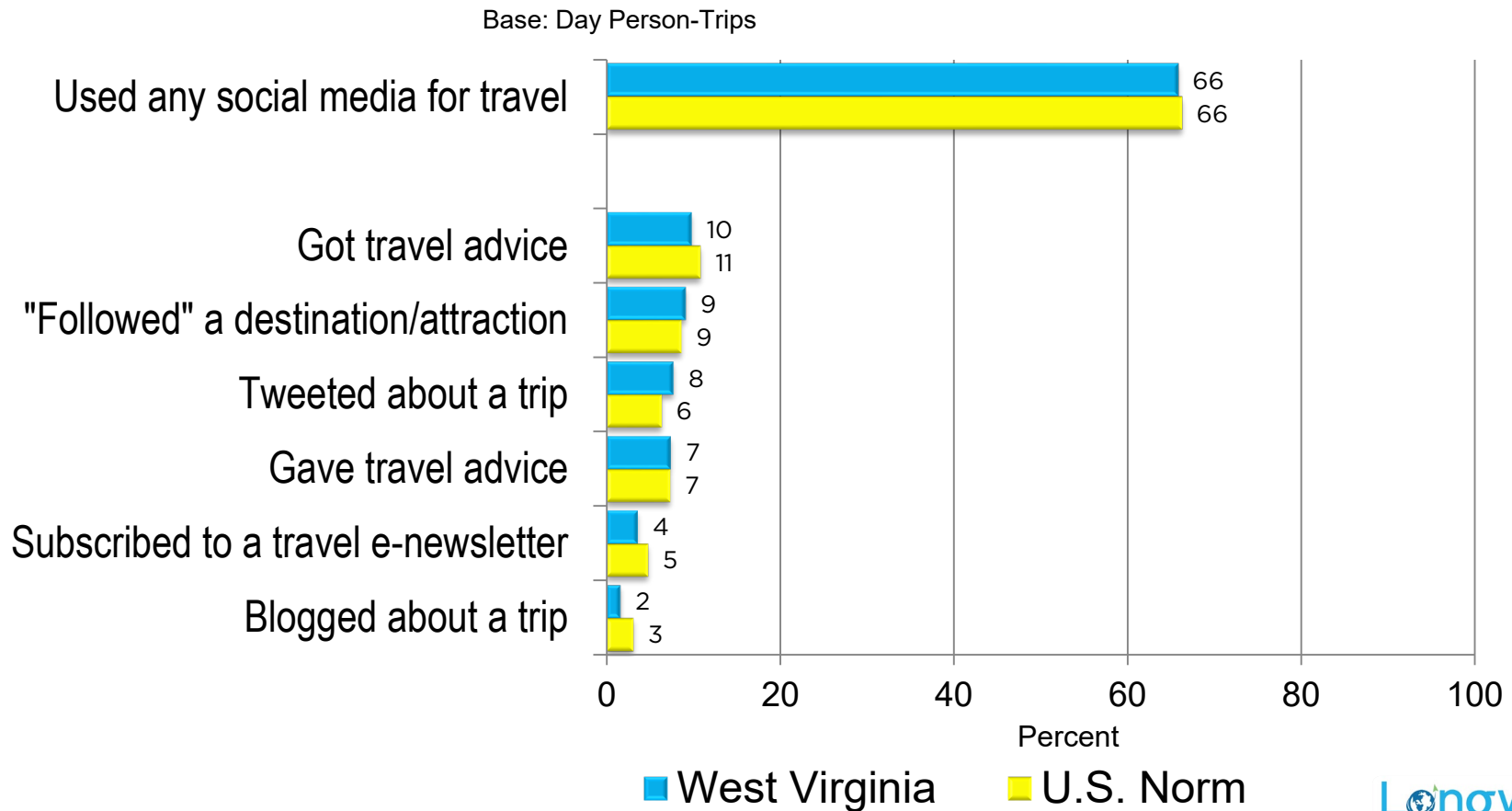
Activities of Special Interest



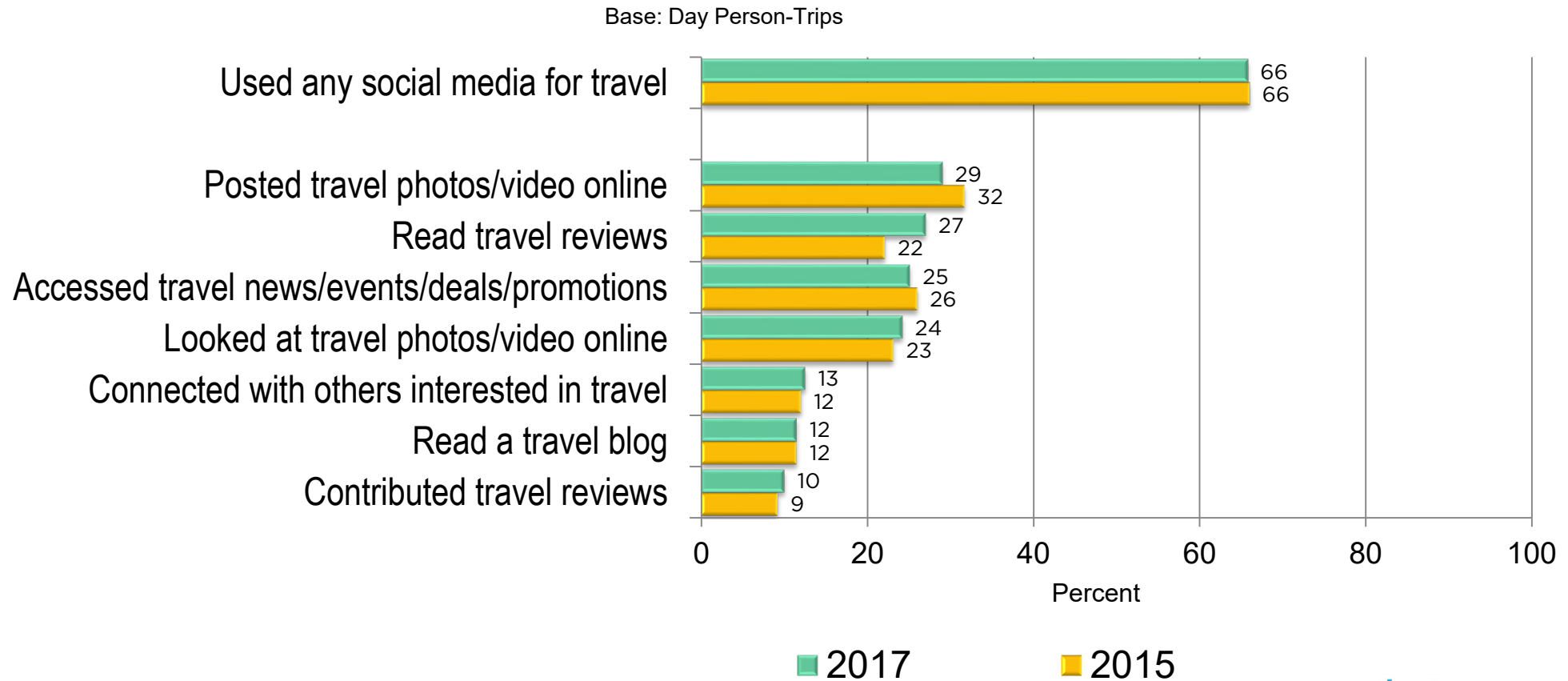
Online Social Media Use by Travelers



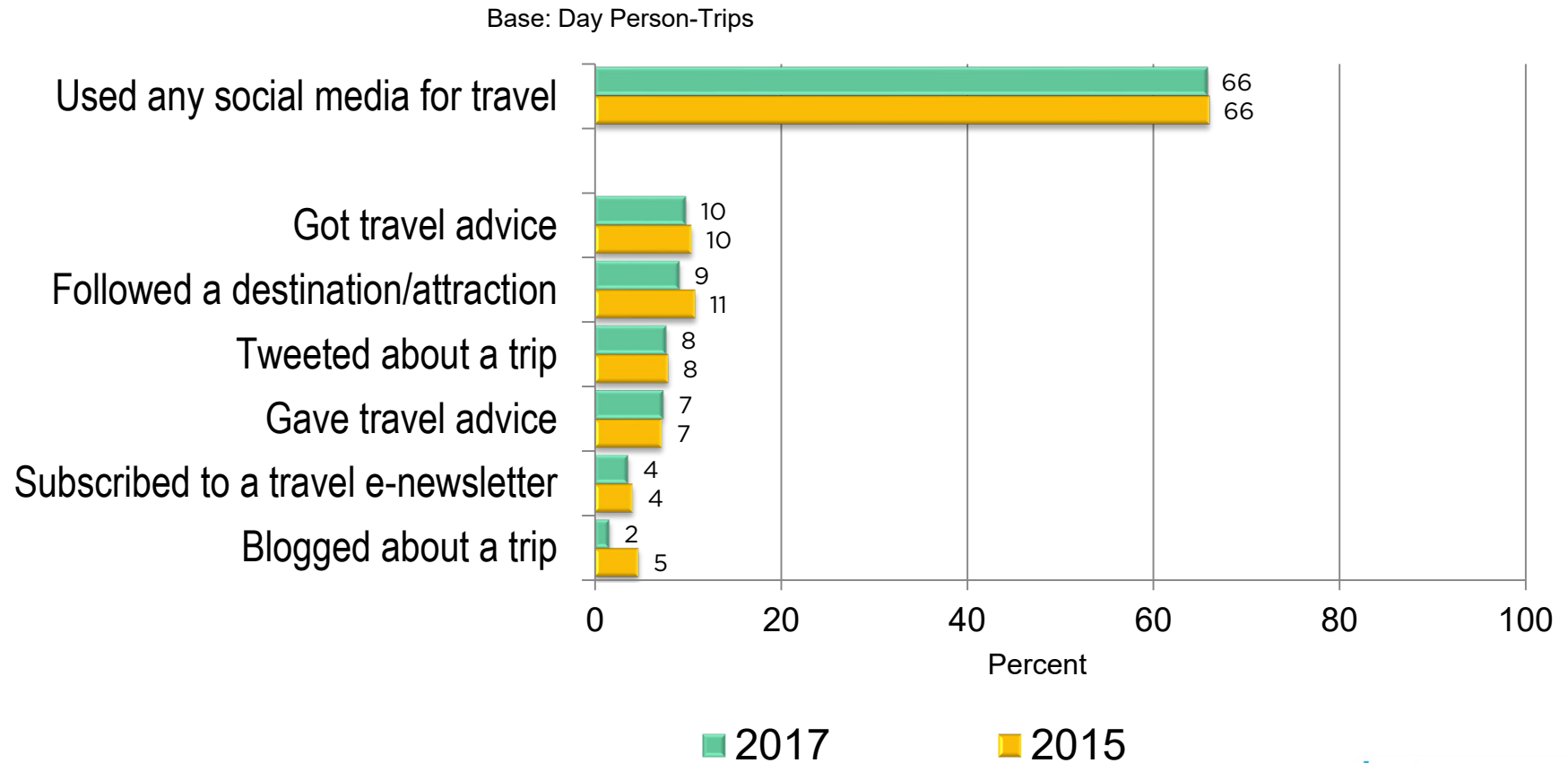
Online Social Media Use by Travelers (Cont'd)



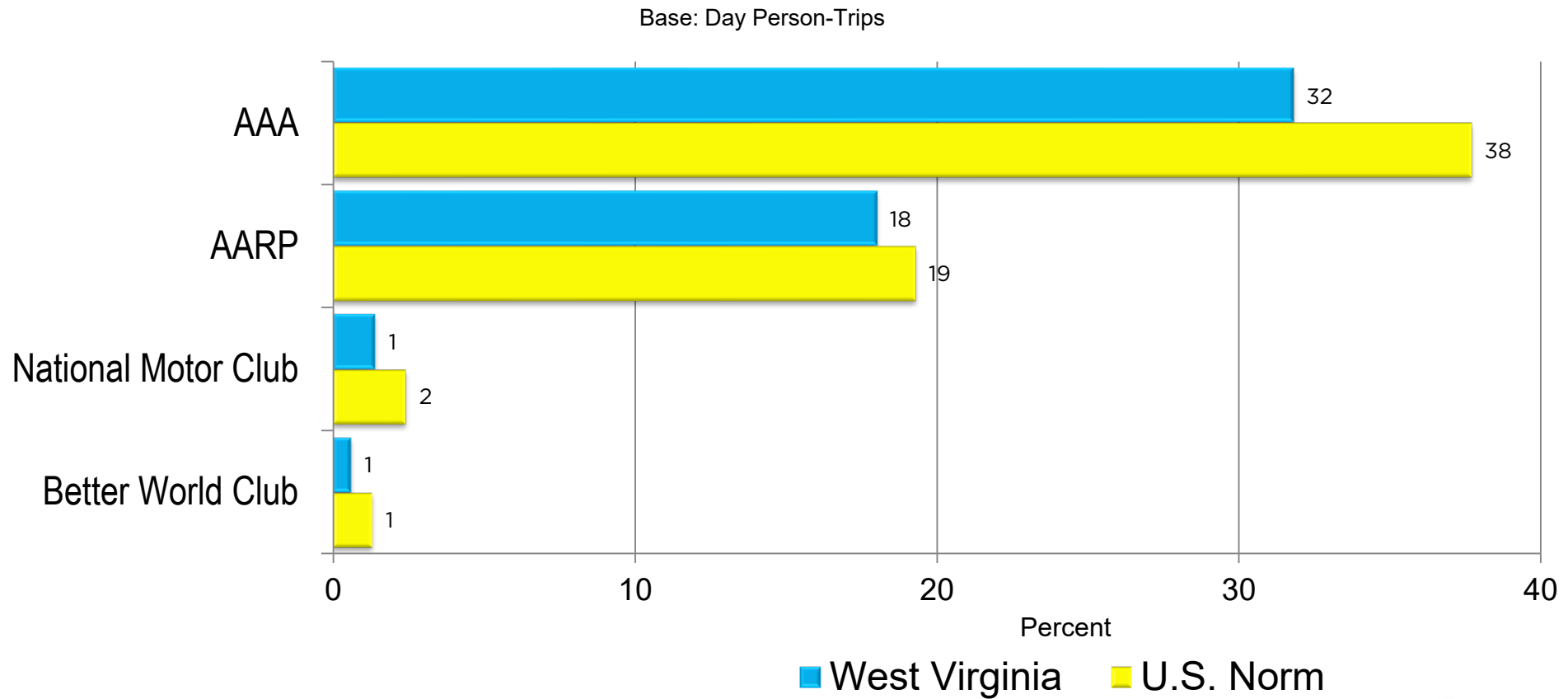
Online Social Media Use by Travelers – 2017 vs. 2015



Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)



Organization Membership



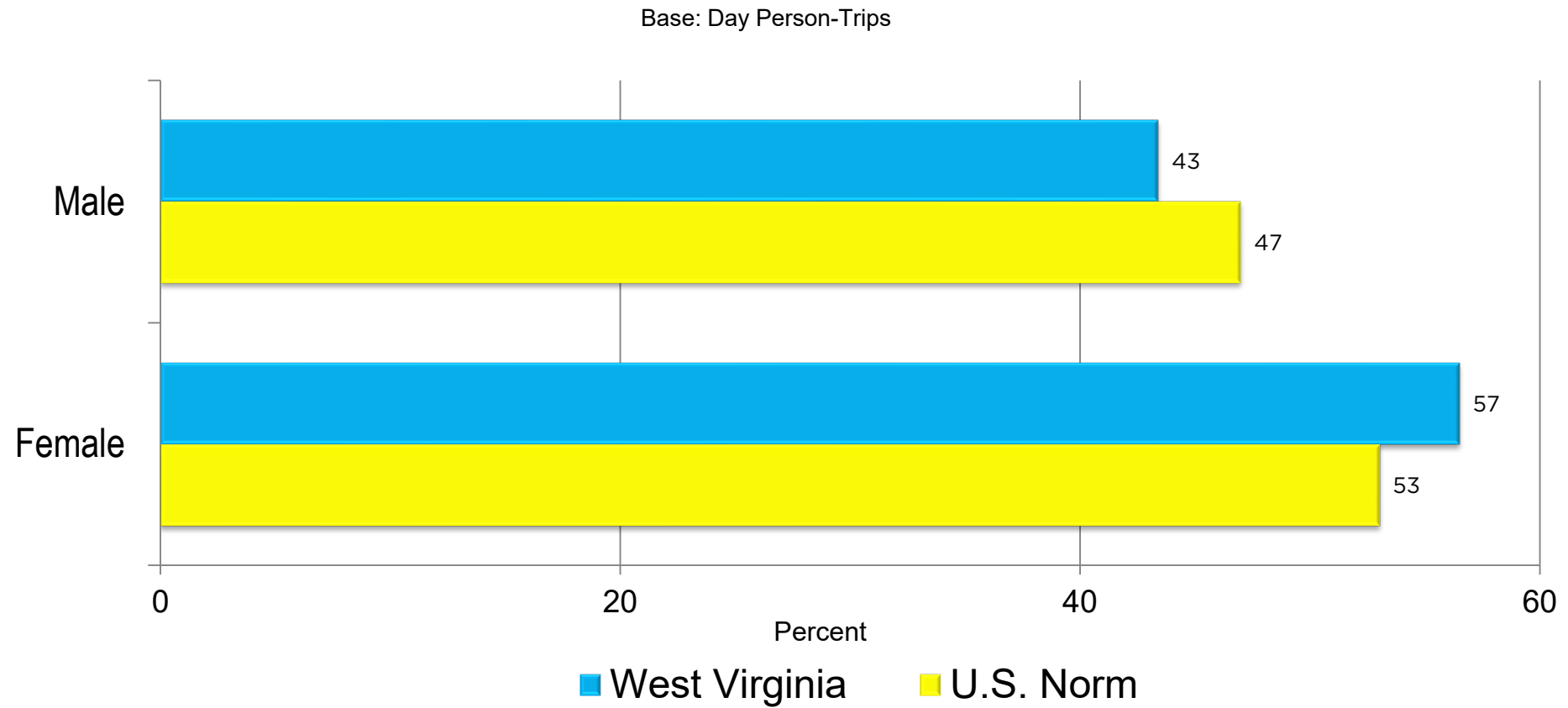


Longwoods
INTERNATIONAL
40 YEARS TOGETHER

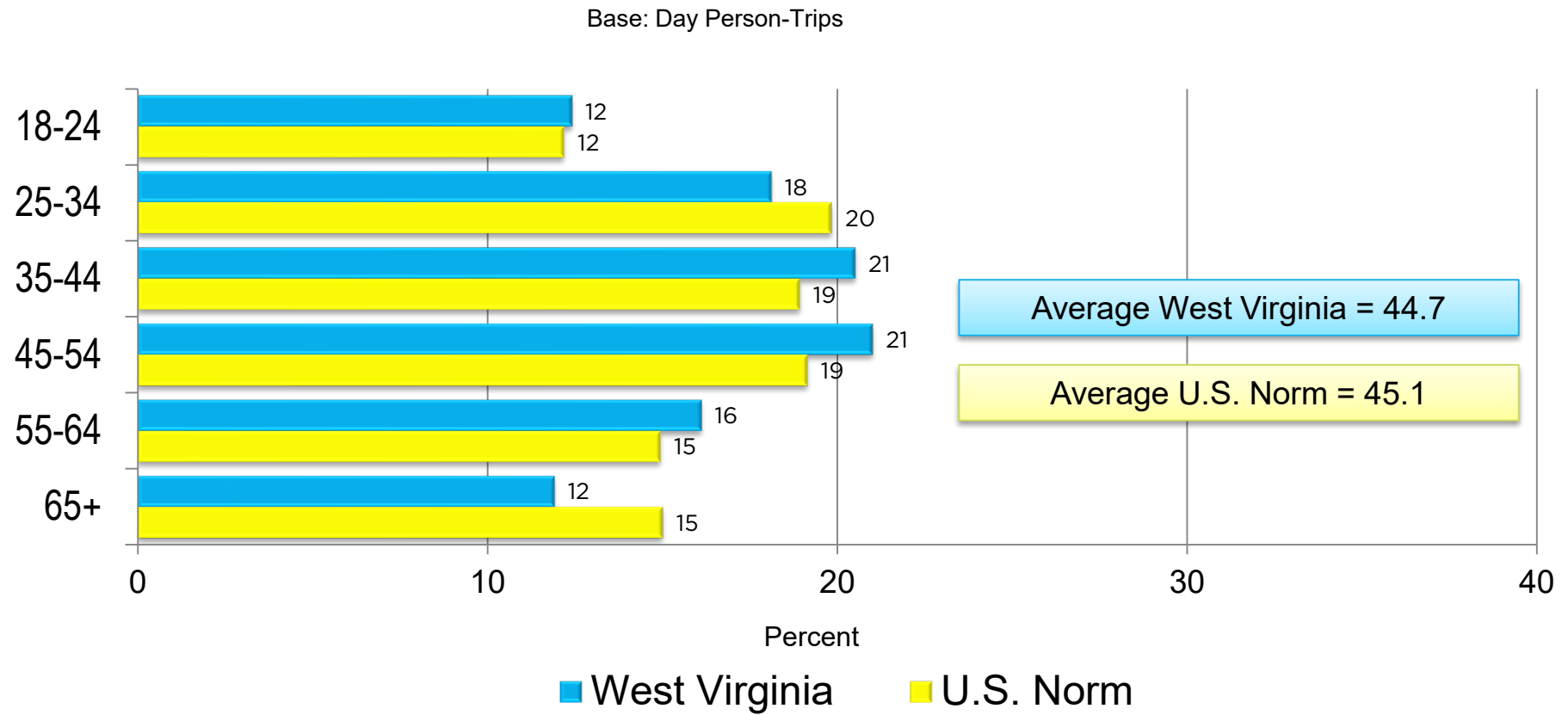
Demographic Profile of Day Visitors



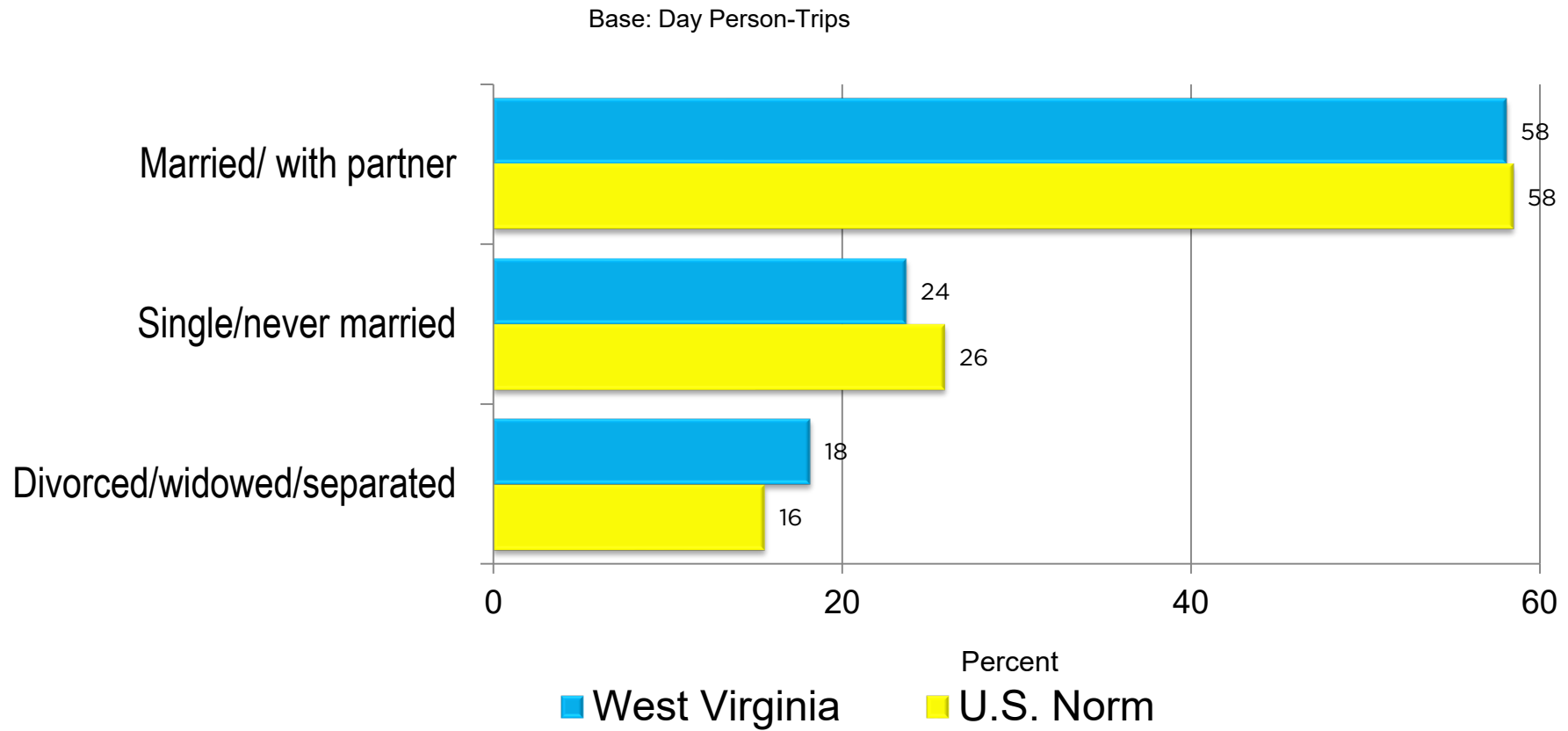
Gender



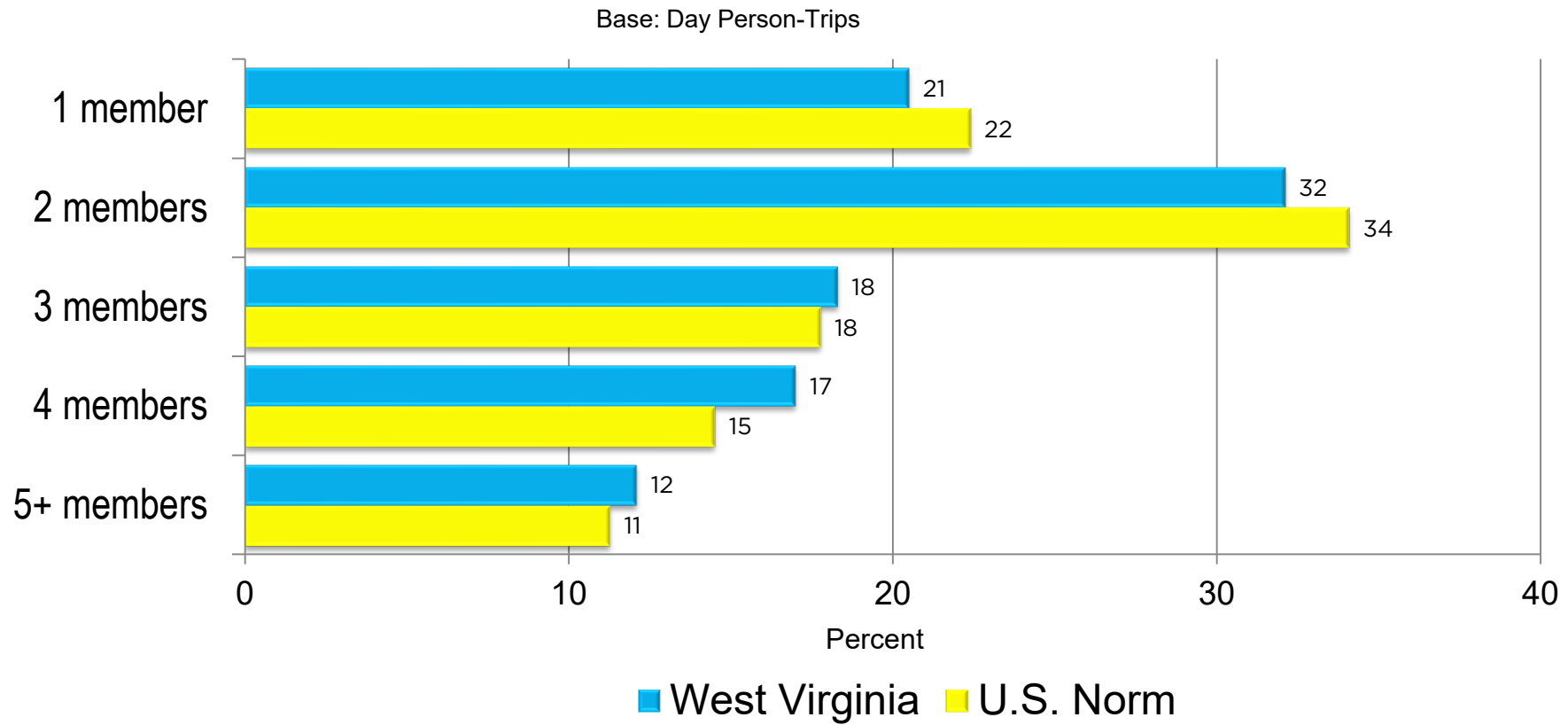
Age



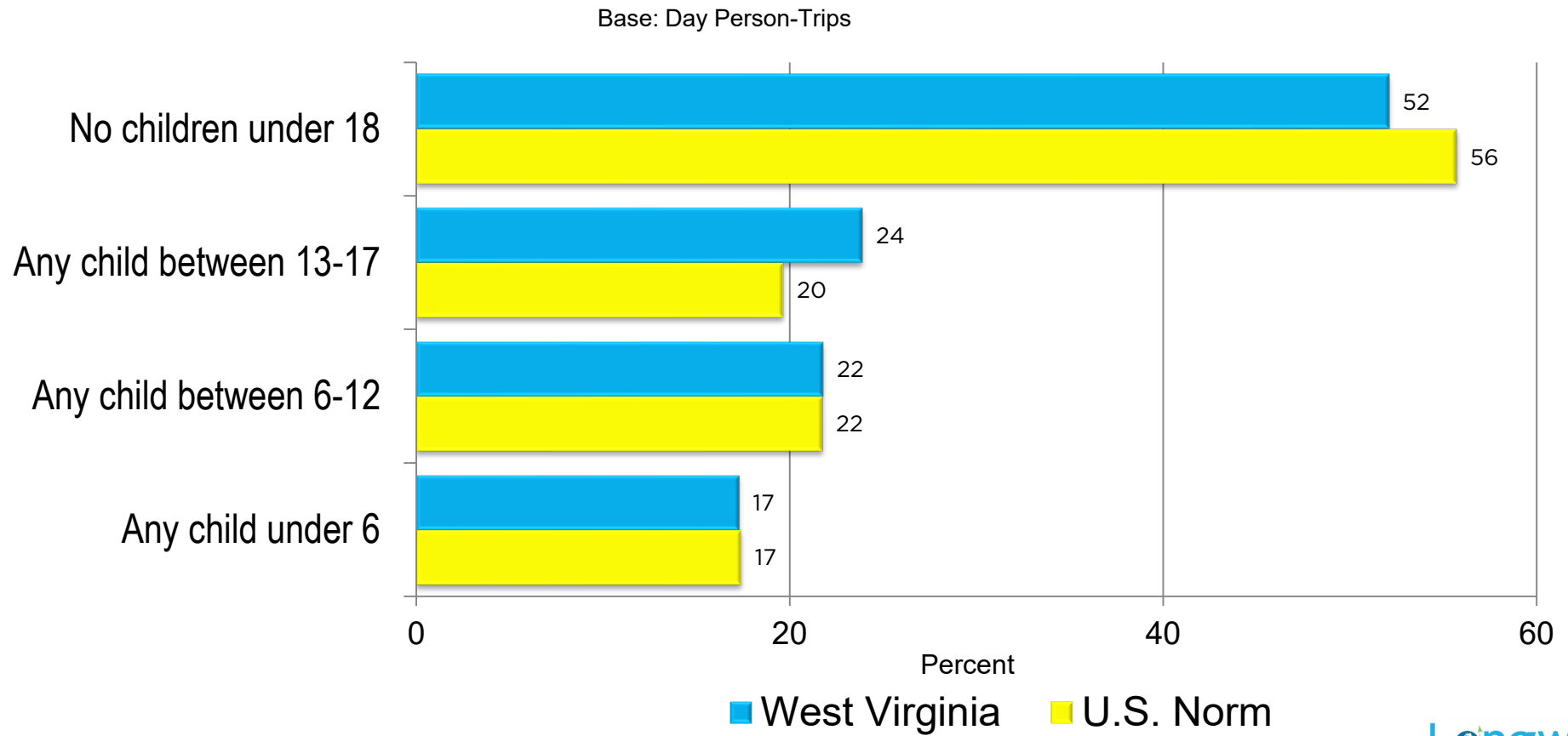
Marital Status



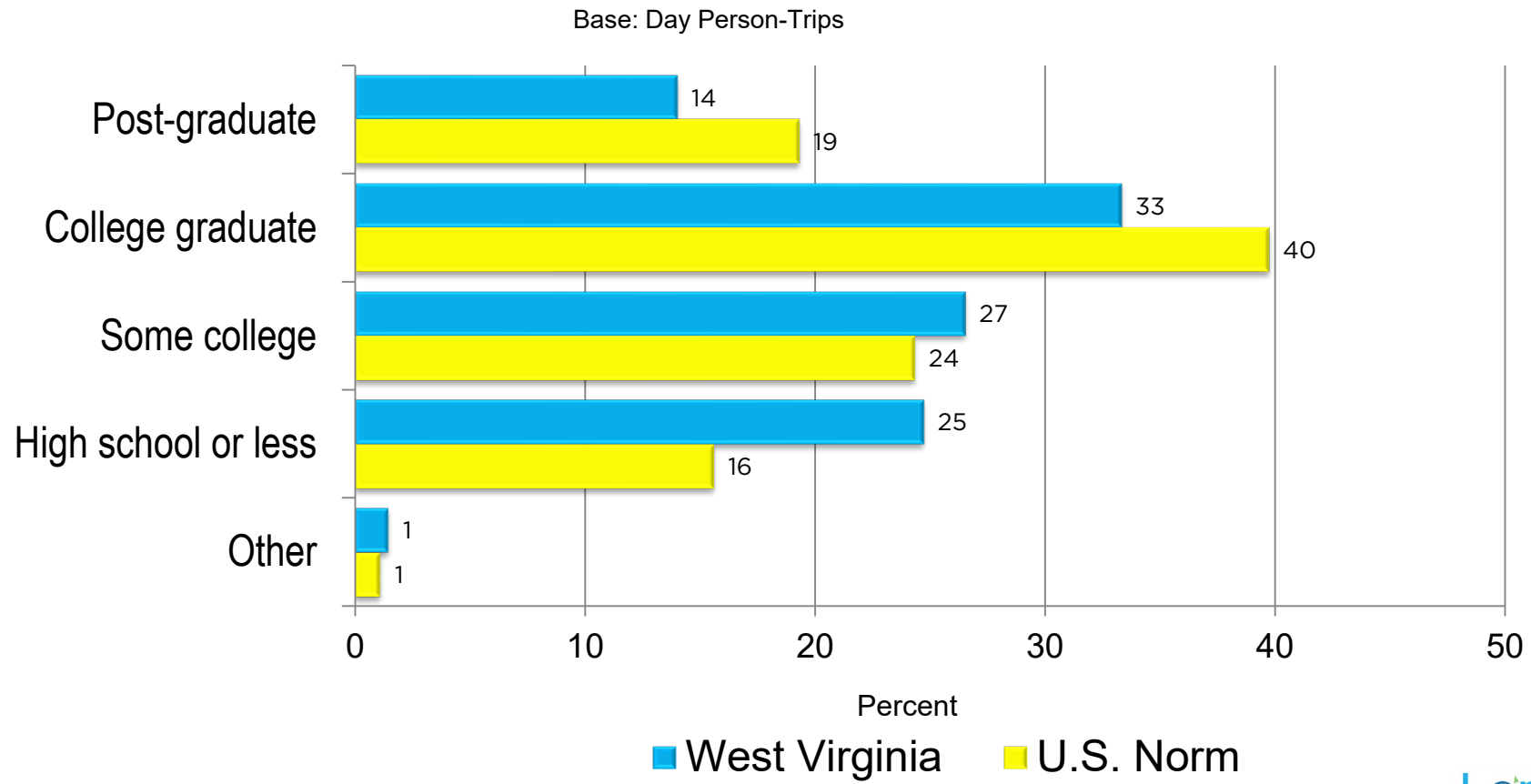
Household Size



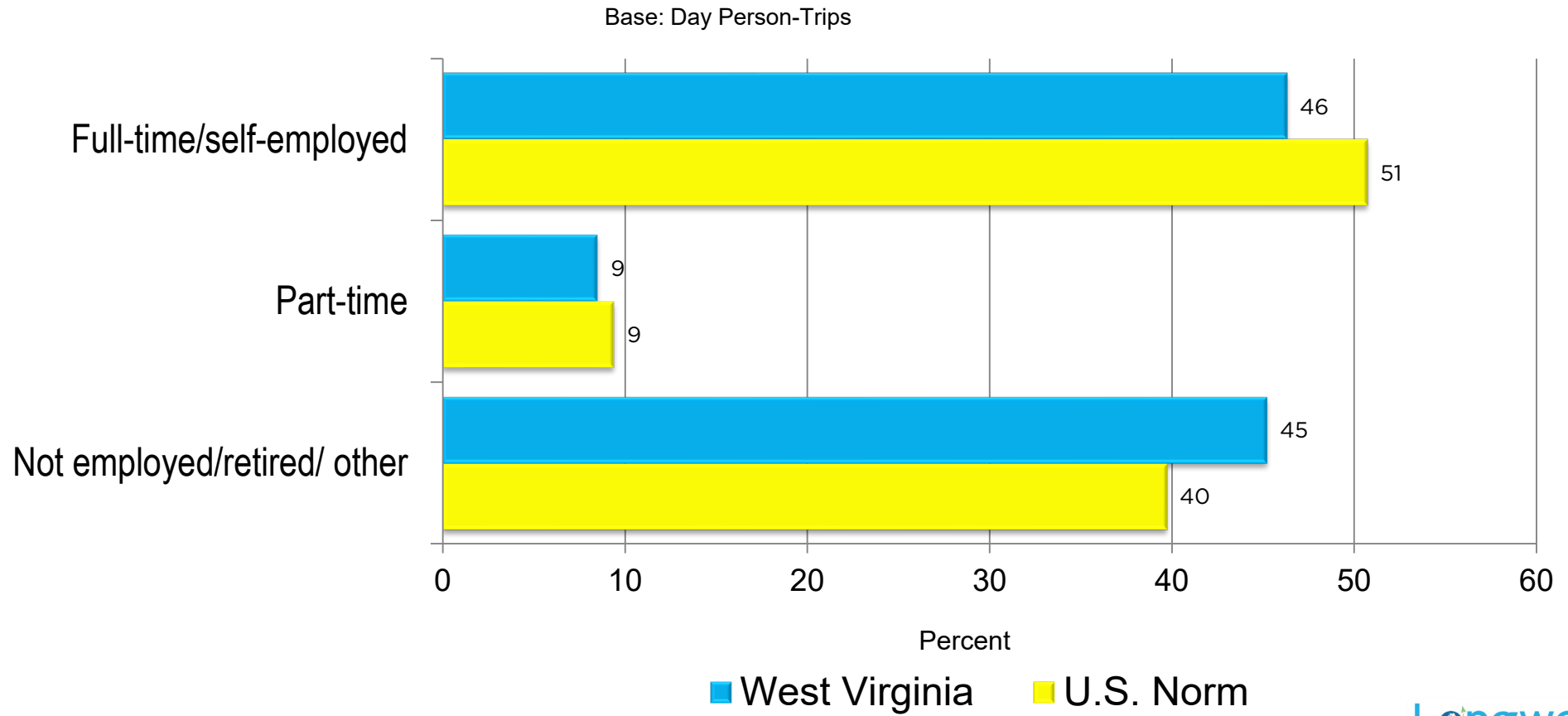
Children in Household



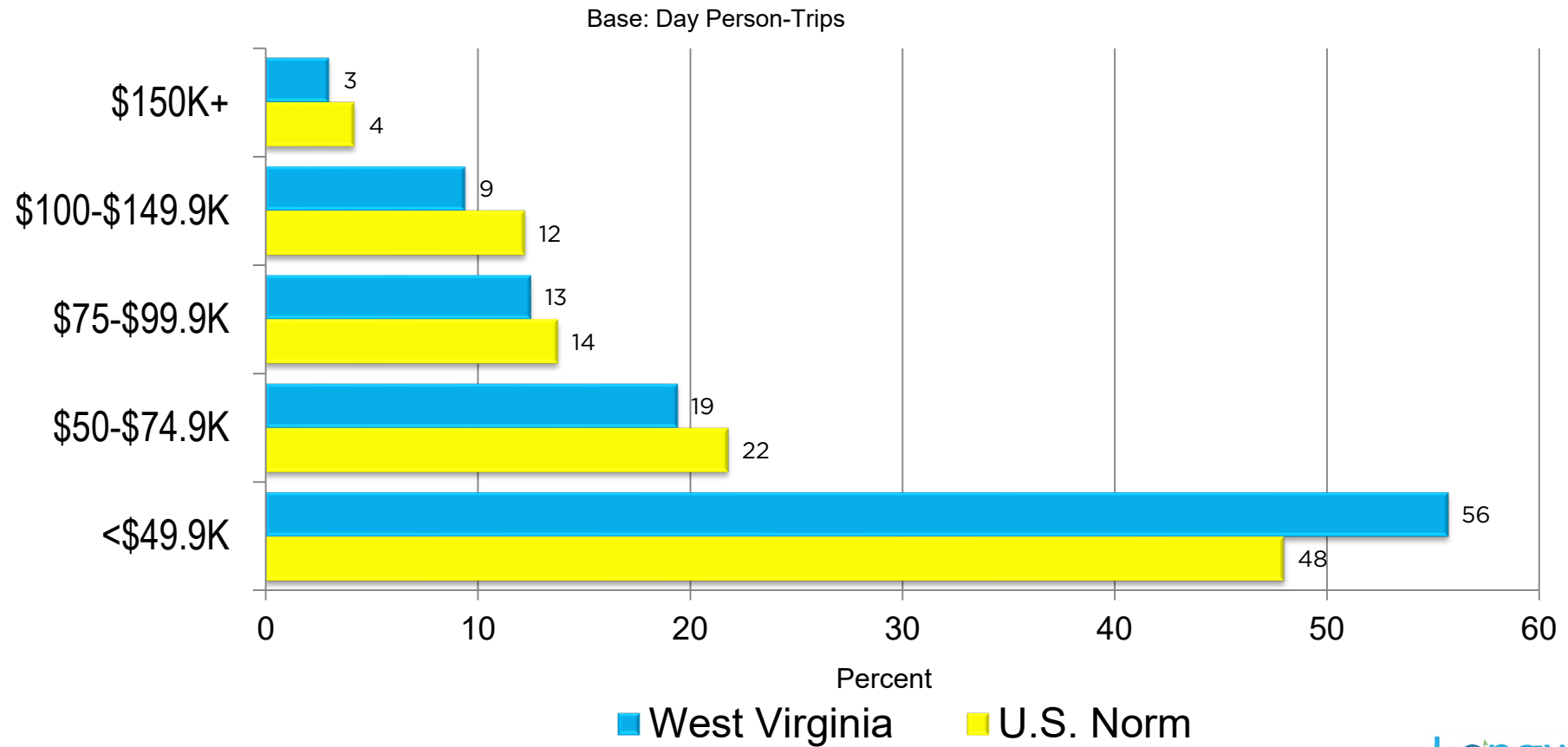
Education



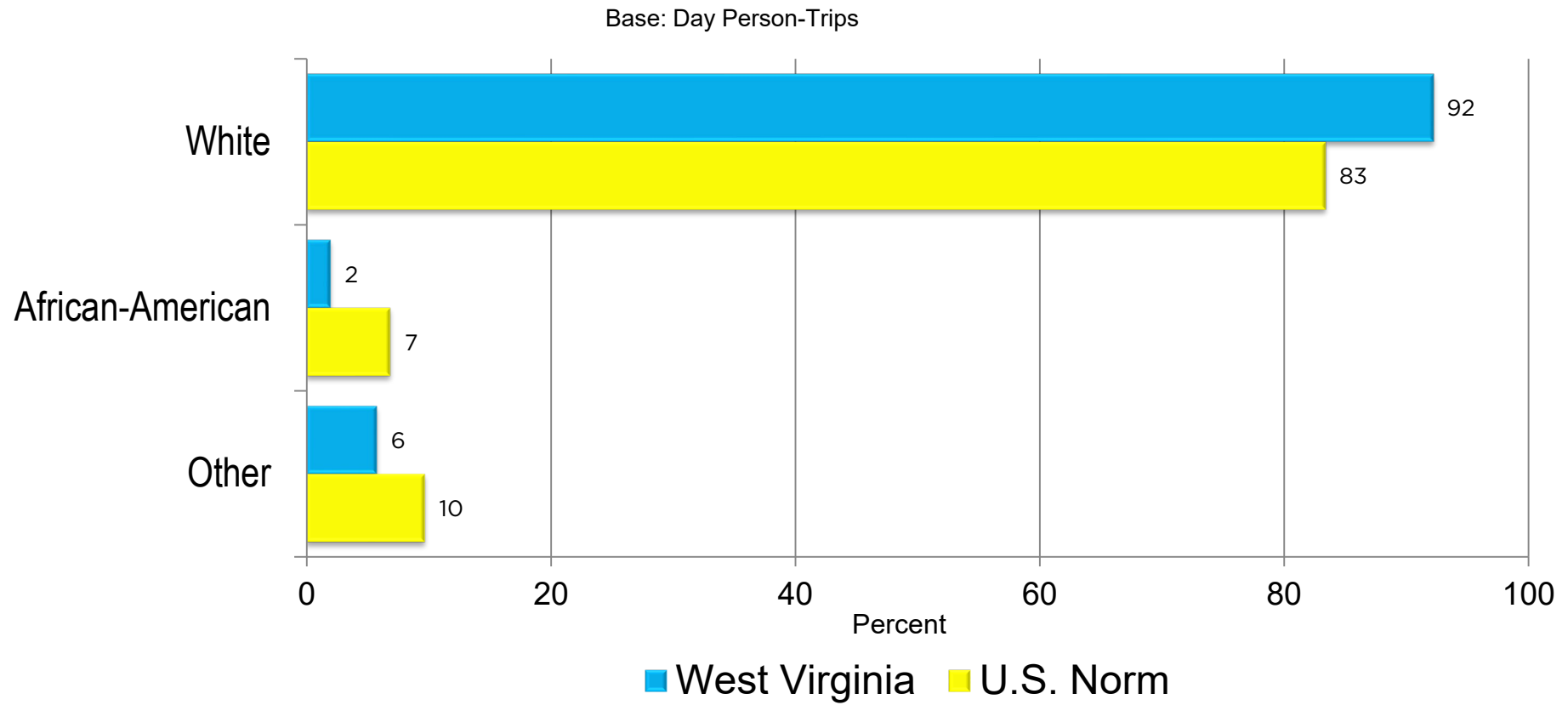
Employment



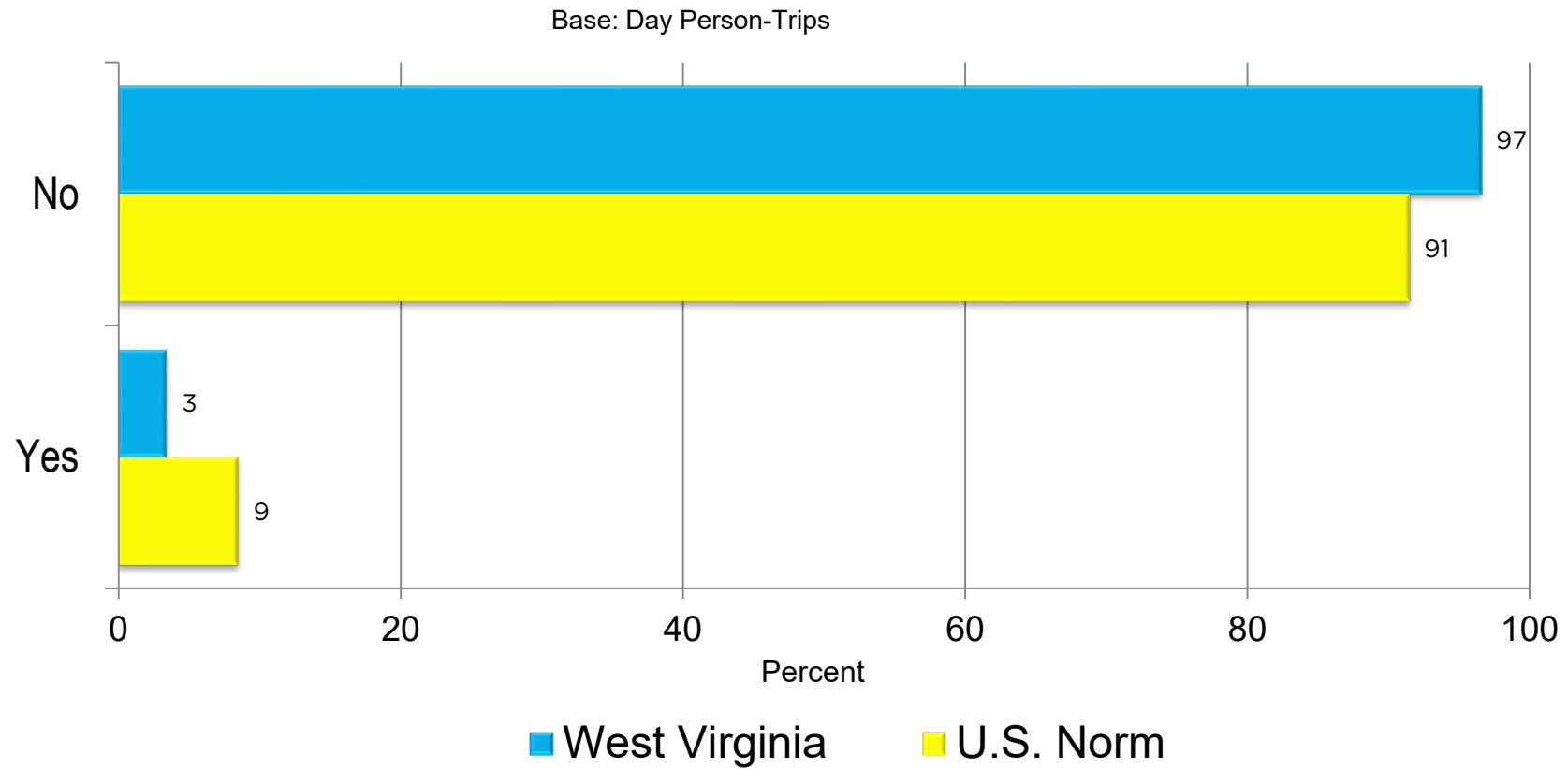
Household Income



Race



Hispanic Background





Appendix: Key Terms Defined



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 **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- A **Person-Trip** is one trip taken by one visitor.
 - Person-trips are the key unit of measure for this report.

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