

**SUMMER 2008  
VIRGINIA BEACH  
OVERNIGHT  
VISITOR  
PROFILE**

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# **SUMMER 2008 VIRGINIA BEACH OVERNIGHT VISITOR PROFILE**

Prepared for  
The Virginia Beach Convention & Visitor Bureau

by

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# INTRODUCTION

The objective of the Summer 2008 Virginia Beach Overnight Visitor Profile is to provide useful information about the Virginia Beach tourist market to interested observers in the private and public sectors. Like its predecessors, the 2008 overnight visitor profile includes a survey of the boardwalk area. In an effort to obtain some reasonable organization of the large volume of data presented in this report, and to maintain consistency and comparability of presentation with previous reports, only findings of the 2008 boardwalk survey are presented in the body of this work.

*All* surveys were managed and conducted by Continental Research, Inc., whose professional interviewers were engaged in personal on-site questioning of visitors. The authors of this report performed compilation, interpretation and analysis of the survey-generated data.

# **ANALYSIS OF SUMMER 2008 VISITOR SPENDING AND THE 2008 BOARDWALK SURVEY**

Based on preliminary survey and tax data, during the summer (June, July and August) of 2008 Virginia Beach's tourist industry experienced record visitor spending levels. Visitor spending on overnight accommodations is the best proxy indicator of year-to-year changes in the overall health of the City's tourist industry. Tax data indicate that lodging revenue in Virginia Beach increased by 4.3 percent over that of the summer of 2007. Despite the increase in lodging revenue however, tax data on lodging demand over the summer period show a decline of 0.2 percent in room-nights occupied.

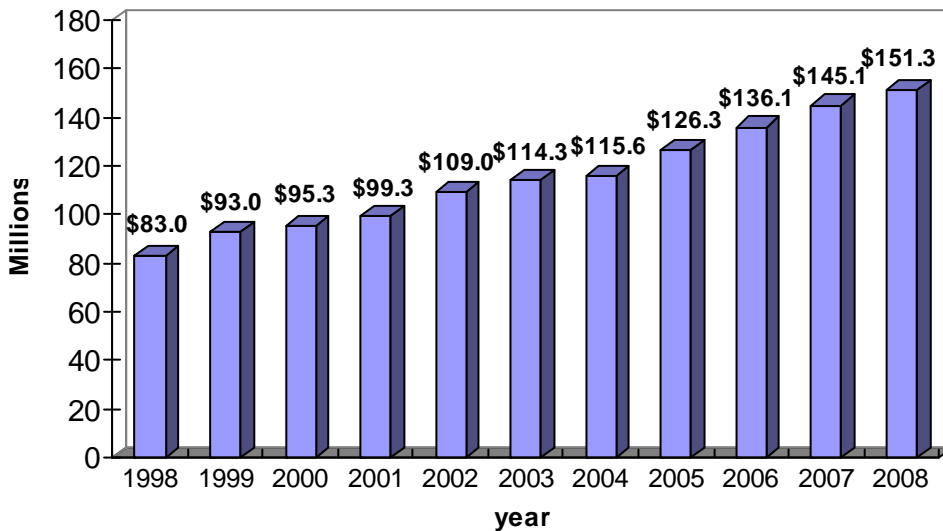
Throughout the first half of 2008, deteriorating economic conditions in the City's primary visitor market area created concern among some that the 2008 summer season would be a particularly difficult one for the industry. Indeed, a small decline in lodging demand did materialize but was offset by increased spending on the part of visitors. Along with relatively good weather and an additional weekend in August, analysis of survey data suggests that one possible reason for the spending increase is the significant rise in visitor's income over that of summer 2007, the implications of which will be explored below.

The final summer 2008 economic results for the tourist industry will be presented in the City's 2008 tourism economic impact study.

## ***Summer Visitor Accommodation: Total Taxable Lodging Sales***

Taxable lodging sales, seen in the accompanying chart, totaled an estimated \$151.3 million during the summer of 2008, a \$6.2 million dollar or 4.3 percent increase over summer 2007 sales.

### **Total Summer Taxable Lodging Sales (Hotels, Cottages and Campgrounds) (1998-2008)**



Source: City of Virginia Beach, and the Old Dominion University  
Economic Forecasting Project

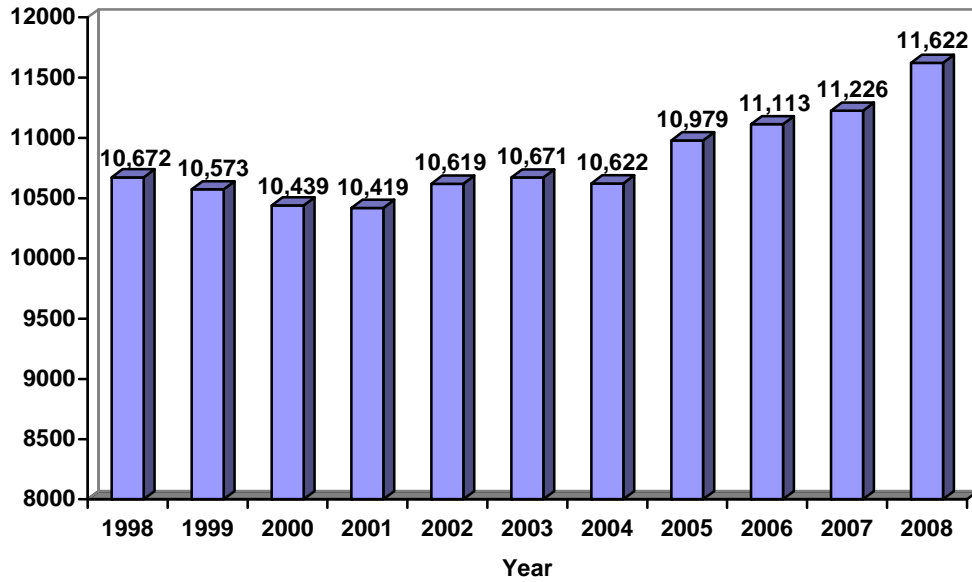
Over the ten-year period from 1998 to 2008, these tax data indicate that summer lodging sales rose by an estimated \$68.3 million, an increase of 82.3 percent.

## ***The Hotel Industry: Estimated Room Revenue Yield***

As seen in the next chart on *available* room supply, the Smith Travel Research (STR) data demonstrate that from 1998 to 2004, the available summer hotel room supply in Virginia Beach remained relatively static at an average over the period of around 10,575 rooms. Since 2004 however, there has been a considerable expansion in available hotel room supply. This expansion likely resulted from pent-up demand created by the relative hotel revenue increase over the period. When compared with the summer of 2004, in 2008 there were 1,000 more hotel rooms available in Virginia Beach, a 9.4 percent increase over the period. Between summer 2007 and 2008, room supply rose by 396 rooms, a 3.5 percent increase.

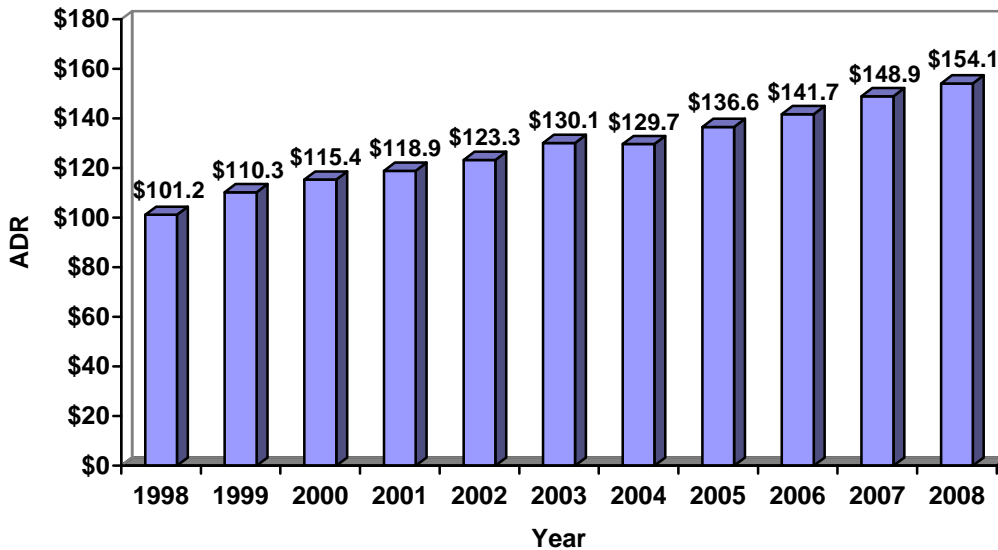
Visitors in the summer of 2008 pushed up the average daily rate (ADR) for an occupied hotel room. 2008 ADR increased by 3.5 percent over the previous summer. Based solely on city room-night tax and revenue data, as seen in the ADR chart, we estimate that ADR for Virginia Beach hotels has risen by 52.3 percent over the ten-year period since the summer of 1998, while STR data for the U.S. indicate that the average ADR for hotels across the nation increased by about 37.4 percent. Both on an average individual hotel basis and for the industry in general, the Virginia Beach hotel industry has fared well over the past decade when compared with the summer hotel revenue data of the nation.

## Virginia Beach Hotels: Average Available Rooms by Year (Summer 1998-Summer 2008)



Source: Smith Travel Research Trend Report 10/21/08, and the Old Dominion University Economic Forecasting Project.

## Virginia Beach Hotels: Average Daily Summer Room Rate (ADR) (1998-2008)



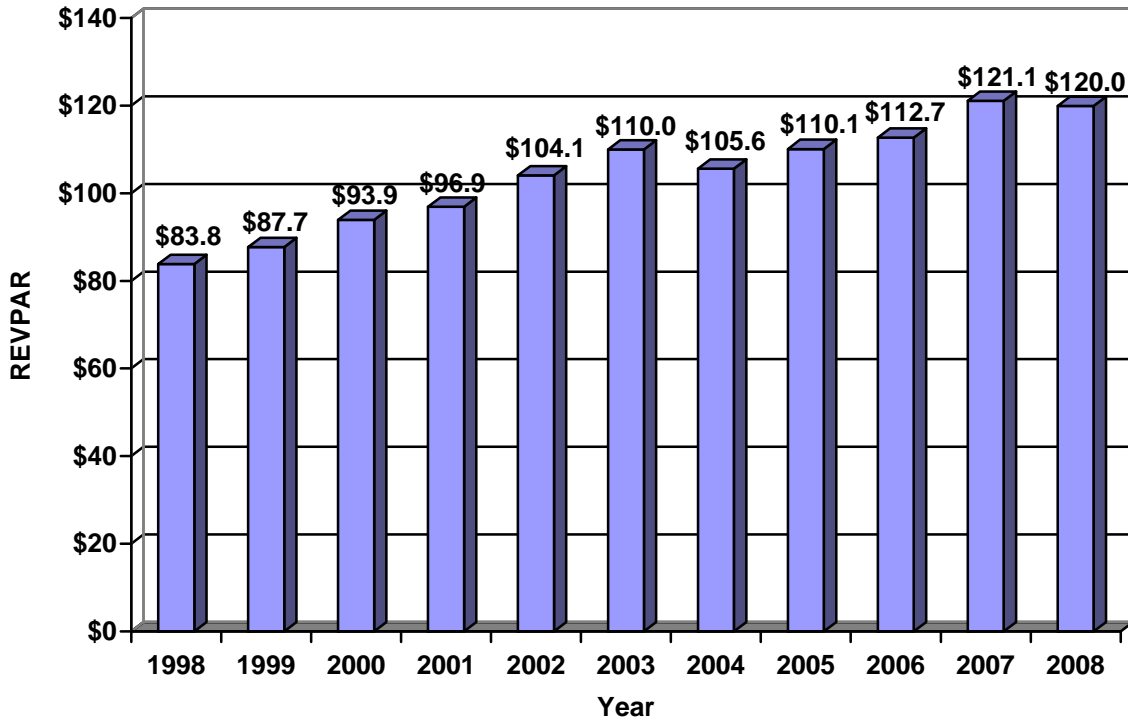
Source: City of Virginia Beach, and the Old Dominion University Economic Forecasting Project

After adjusting for implicit inflation between the summer of 1998 and 2008, real (price-adjusted) hotel room rates in Virginia Beach increased by 20.3 percent for an average year-to-year real ADR price adjusted growth rate of about 1.6 percent per year. The consistent year-to-year rise in price-adjusted average room rates is an indication of a continued and substantial long-term strengthening in the economic viability of the Virginia Beach hotel industry over the past ten years.

A favorite measure of innkeepers to track hotel performance is revenue per available room (REVPAR). As seen in the accompanying chart, based on STR estimates, REVPAR in Virginia Beach during the summer tourist season rose steadily between 1998 and 2007. However, between 2007 and 2008 REVPAR declined by 0.9 percent.

Why the REVPAR decline between 2007 and 2008? The technical reason for this decline is the rapid increase in available rooms, seen in a previous chart, from 2007 to 2008. Specifically, summer 2008 experienced the largest inter-year increase in available rooms over the past ten years. Further, the method for estimating REVPAR is to divide total revenue by the number of available rooms. Therefore, in summer 2008 Virginia Beach hotel revenue did not grow as rapidly as available rooms causing a decline in REVPAR between summer 2007 and 2008.

## Virginia Beach Hotels: Summer Revenue per Available Room (REVPAR) (1998-2008)



Source: Smith Travel Research Trend Report 10/21/08, and the Old Dominion  
University Economic Forecasting Project

Another way to view the 2007 to 2008 decline in REVPAR is to see that the rise in demand for hotel rooms did not rise fast enough to offset the rise in supply. Why not? Some potential reasons based on the deteriorating economic climate faced by households in Virginia Beach's market area are outlined in the next section of this report.

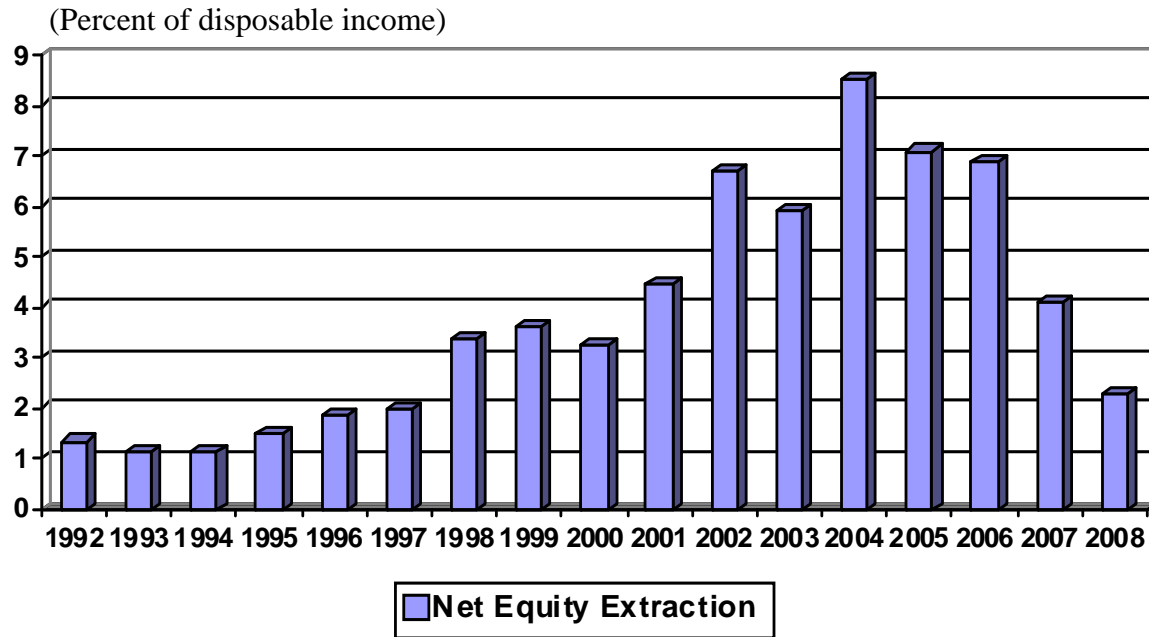
## ***The Hotel Industry: General Economic Conditions, Revenue Distribution and Local Market Share***

### ***General Economic Conditions***

Based on STR data (STR Trend Report, September 23, 2008) and our estimations, the U.S. hotel industry experienced about a 0.8 percent decline in room demand between the summer of 2007 and 2008. Over the same summer period room demand in Virginia Beach declined by 0.3 percent. This decline in room demand is the result of the adverse economic conditions that households throughout the U.S. faced over the first two quarters of 2008.

In essence, as many opinion surveys have reported, U.S. households feel poorer and as a result are likely to spend less on travel. The Old Dominion University Economic Forecasting Project (ODUEFP) has identified three reasons for the general negative economic conditions of U.S. households that are likely to affect their travel. First, because of declining house prices and reduced credit availability, households found it more difficult to refinance their homes. The accompanying chart shows the significant drop in household mortgage equity withdrawal, a potential source of funds that households could tap for their travel expenses.

## Mortgage Equity Withdrawal



Source: Federal Reserve - Kennedy/Greenspan data updated as of September 2008 and the Old Dominion University Economic Forecasting Project. 2008 is estimated based on K/G data and Mortgage Bankers Association Sept. 2008 MBA Mortgage Finance Forecast of mortgage refinancing.

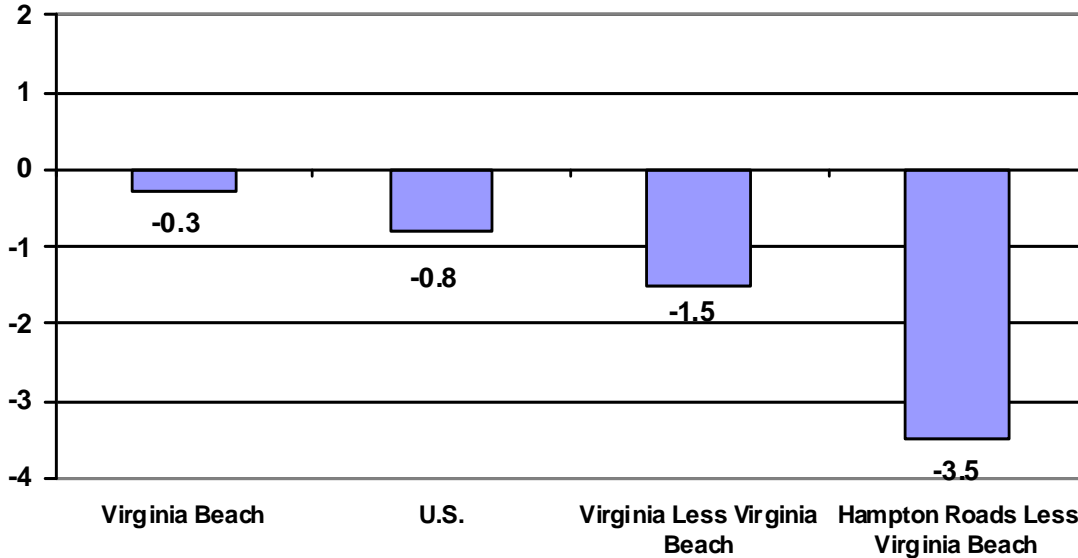
Second, ODUEFP estimates that higher gasoline prices through August of 2008 on an annualized basis cost an estimated \$800 per household, significantly reducing household discretionary budgets. In short, travel plans became a casualty for some as household budgets were being realigned to deal with the adverse economic circumstances resulting from higher gasoline prices. These conditions are particularly pressing for lower income households who face less flexibility in reallocating their budget expenditures with regard to travel plans.

Third, based on Federal Reserve data, the ODUEFP has estimated that, because of falling house prices and financial market losses, household wealth declined by roughly \$2 trillion over the first

two quarters of 2008. This “wealth effect” also took its toll on travel plans in the summer of 2008.

The practical outcome of the reduced means of households on 2008 summer travel can be seen in the accompanying hotel demand chart based on STR data. The chart demonstrates hotel demand changes between the summer of 2007 and summer 2008. Note that during this period room demand, measured in percentage terms, declined across all the selected areas, particularly in the portion of Hampton Roads outside of Virginia Beach. Further, visitation to both Hampton Roads excluding Virginia Beach and Virginia excluding Virginia Beach, appears to have been more adversely affected by the reduction in household discretionary income than the nation or Virginia Beach. Based on these comparative STR data, the decline in room-night demand experienced in the summer of 2008 was relatively mild in Virginia Beach.

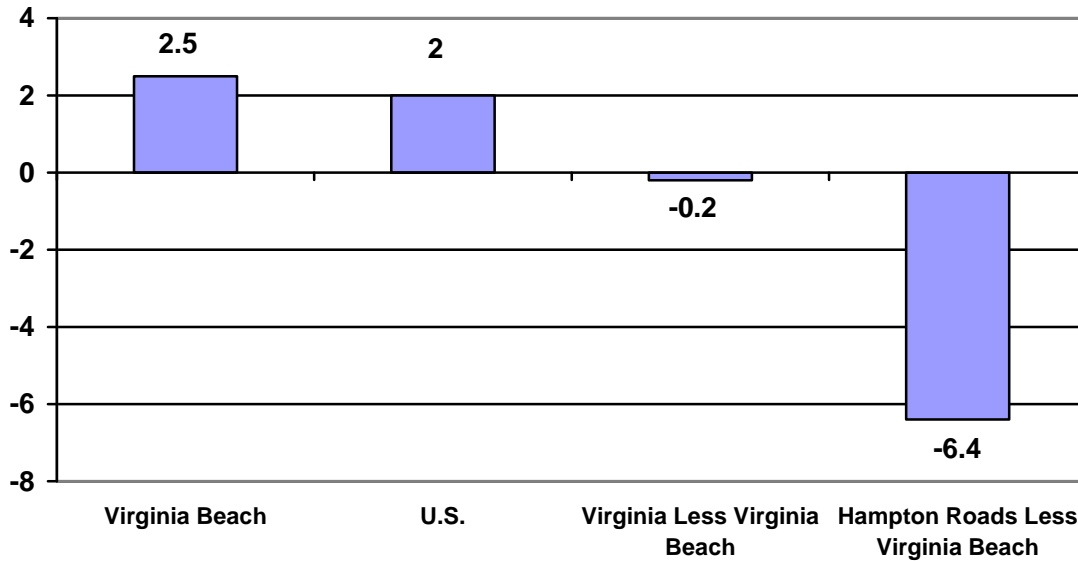
## Estimated Hotel Demand (Room-nights Occupied) Percentage Change from Summer 2007 to Summer 2008



Source: Smith Travel Research Trend Report 9/23/08, and the Old Dominion University Economic Forecasting Project. Hampton Roads in Smith Travel Research data includes the following cities and counties: *Currituck County, Gloucester County, Isle of Wight County, James City County, Mathews County, York County, Carrollton, Chesapeake, Corolla, Grimstead, Hampton, Hays, Newport News, Norfolk, Portsmouth, Smithfield, Suffolk, Virginia Beach and Williamsburg.*

Despite the budget problems of households and the subsequent decline in room-nights, as seen in the accompanying revenue chart, Virginia Beach hotels experienced an increase in room revenue between the summer of 2007 and 2008. With respect to hotel room revenue, the percentage increase in Virginia Beach over the period was slightly higher than that of the U.S. Further, using the same measure and over the same period Virginia Beach significantly outperformed Virginia excluding Virginia Beach. In addition, Virginia Beach outperformed Hampton Roads.

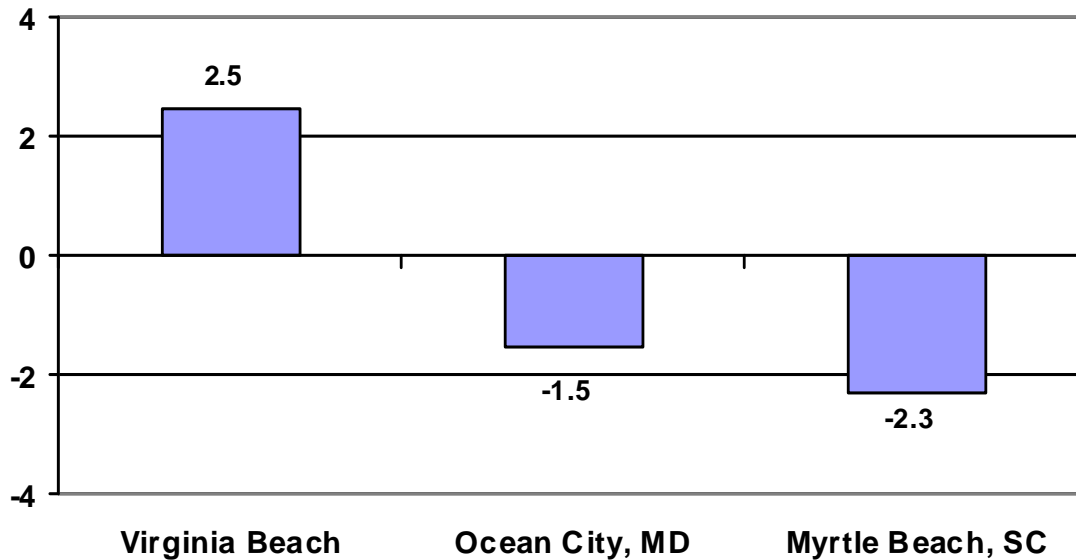
## Estimated Hotel Revenue Percentage Change from Summer 2007 to Summer 2008



Source: Smith Travel Research Trend Report 9/23/08, and the Old Dominion University Economic Forecasting Project.

A similar revenue pattern is apparent when Virginia Beach summer hotel revenue is compared with that of its two main rivals for summer visitors; Ocean City, Maryland and Myrtle Beach, South Carolina. As shown in the accompanying chart, Virginia Beach's positive summer hotel revenue growth contrasts sharply with declines among its two central competitors.

## Estimated Hotel Revenue Percentage Change from Summer 2007 to Summer 2008



Source: Smith Travel Research Trend Reports 10/21/08, 10/27/08, and the Old Dominion University Economic Forecasting Project.

### *Distribution of Hotel Spending*

To this point the hotel demand and revenue data indicate that in the summer of 2008 Virginia Beach fared better than its major competitors and better than close-by destination points. However, it is likely that when it comes to the summer 2008 travel slowdown, not all Virginia Beach hotels shared equally in the aggregate revenue gain.

As shown in next chart on revenue by type of hotel, STR data indicate that less pricey hotels in *Hampton Roads* experienced significant and serious declines in revenue between the summer of 2007 and the summer of 2008. In this chart hotels are arranged in descending order by price from most expensive (Luxury) to the least expensive (Budget). The two highest price categories, Luxury and Upscale, experienced mostly positive revenue gains over the course of the summer.

On the other hand, significant revenue erosion was experienced at the lower end of the scale, Economy and Budget.

### **Estimated Summer 2008 Change in Hampton Roads Hotel Room Revenue By Hotel Type**

	<b>June</b>	<b>July</b>	<b>August</b>
<b>Luxury</b>	-3.7	1.8	6.0
<b>Upscale</b>	0.7	1.9	1.3
<b>Mid Price</b>	-10.7	-2.9	-3.9
<b>Economy</b>	-22.1	-15.4	-15.3
<b>Budget</b>	-18.9	-10.5	-10.6

Source: Smith Travel Research. June, July and August CVB Reports

The revenue by type of hotel chart applies to Hampton Roads and not specifically to Virginia Beach (data disaggregated for Virginia Beach is not currently available to us). However, based on anecdotal evidence and the fact that Virginia Beach revenue makes up nearly fifty percent of Hampton Roads hotel revenue it is likely that the pattern of summer revenue decline by hotel price appeared in Virginia Beach as well as the remainder of the metropolitan area.

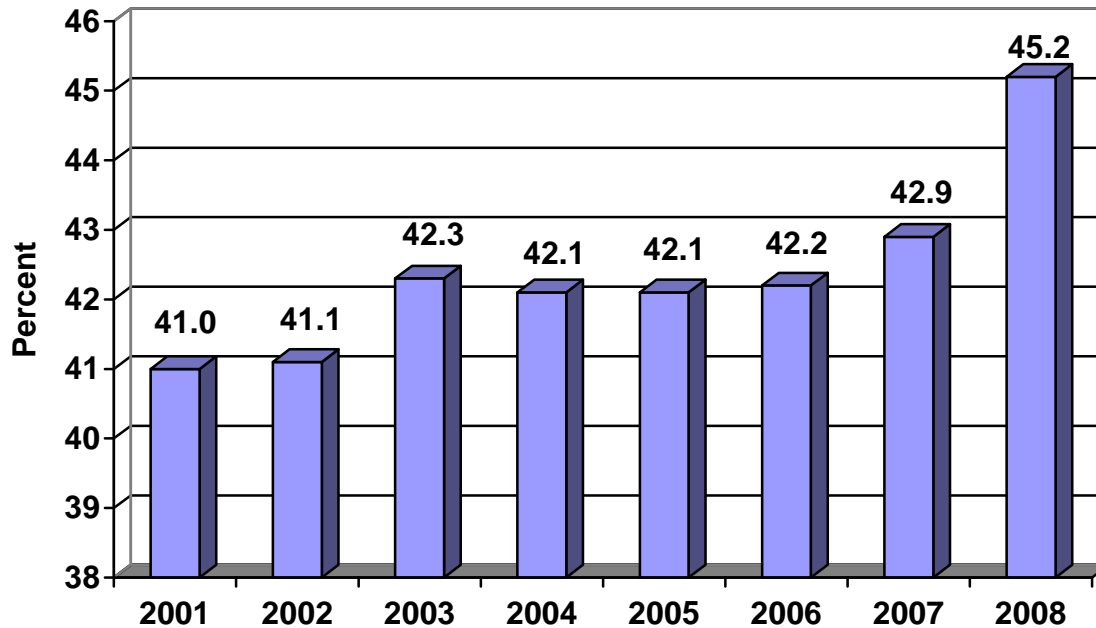
What might be the source of this summer 2008 revenue distributional pattern among Virginia Beach hotels? It appears that the economic circumstances faced by U.S. households, especially rising gasoline prices, impacted most on the household budgets of middle to lower income

families. Summer survey data indicate that the income of Virginia Beach visitors increased by 5.6 percent over that of summer 2007. Further, overnight visitors with household income greater than \$75,000 increased from slightly more than one in every two visitor to three of every five visitors.

### ***Virginia Beach's Local Market Share of Summer Hotel Revenue***

The positive performance of Virginia Beach's hotel industry has led to a significant increase in the City's summer market share of hotel revenue in Hampton Roads. As seen in the next chart, Virginia Beach's share of hotel revenue, which has been rising fairly consistently since 2001, increased rapidly in the summer of 2008. The rise in Virginia Beach's hotel summer market share in 2008 is the result not so much of its room revenue increase but a decline in room revenue in other parts of Hampton Roads.

## Estimated Virginia Beach Market Share Based on Hampton Roads Summer Hotel Revenue (2001-2008)



Source: Smith Travel Research Trend Report 9/23/08, and the Old Dominion Economic Forecasting Project

### *The Visitor Market: Core Market and Canadians*

#### *Core Geographical Market*

Virginia Beach is a visitor destination point with a historically stable core geographic market. Despite the economic circumstances described above, visitor origin data for the summer of 2008 varies little with respect to this core market. As has been pointed out in previous summer profiles, years of data on summer overnight visitors to Virginia Beach allow us to paint a statistical picture of this highly stable and thus fairly predictable geographic market that contributes to the city's summer tourism industry. Basic data on how far visitors travel, where they come from and how they get to Virginia Beach for the most part change only marginally

from year-to-year. For example, the top metropolitan areas where visitors originate their trips almost always include, in descending order of importance, Washington, D.C., Richmond, New York City and Pittsburgh with Roanoke, Philadelphia, Baltimore and Cleveland alternating in the fifth and sixth spots depending on the year. These metros account for more than one of every two summer visitors.

Additionally, the top six states in the Virginia Beach visitor market in descending order of importance consistently include Virginia, Pennsylvania, Ohio, Maryland and New York with West Virginia, New Jersey and North Carolina alternating in sixth place from year-to-year. The top six states in any given summer usually account for slightly less than three of every four summer visitors and constitute the Virginia Beach tourism industry's core market area.

In sum, despite the budget difficulties faced by households, it should be stressed the above described economic conditions have, at least through the summer of 2008, not altered the basic characteristics of Virginia Beach's core market.

### ***The Canadian Market***

As reported and analyzed in the 2007 Virginia Beach Summer Visitor Profile, since 2002 Canadian visitors from Ontario and Quebec have become an increasingly important portion of summer visitors to Virginia Beach because of changes in the Canadian economic environment. In particular, our statistical analysis indicated that the two main correlates with increased Canadian visitation are economy-wide increases in income in the provinces of Quebec and

Ontario and appreciation of the Canadian dollar compared with the U.S dollar. Therefore, these correlates bear watching.

From 2002 to 2008 the Canadian dollar experienced a strong appreciation and income growth in the provinces was relatively high. As seen in the accompanying chart, the proportion of Canadian visitors to Virginia Beach increased slightly to 8.6 percent in the summer of 2008. This slight increase occurred despite a four percent appreciation of the Canadian dollar or “loonie” and the effect of the loonie appreciation was partially offset by weaker income growth in the provinces since 2005.

**Canadian Visitors as a Proportion  
of Summer Visitors to Virginia Beach  
and the Canadian Dollar Relative to the U.S. Dollar  
(Summer 2002-2008)**

	2002	2003	2004	2005	2006	2007	2008
<b>Canadians as a Proportion of Visitors</b>	4.2%	4.5%	5.3%	9.3%	9.2%	8.3%	8.6%
<b>Canadian Dollars to One U.S. Dollar (Summer)</b>	\$1.53	\$1.38	\$1.28	\$1.20	\$1.12	\$1.05	\$1.01
<b>Combined Ontario and Quebec Nominal Income Growth Rate</b>	5.8%	3.4%	4.9%	5.6%	4.2%	3.5%	2.0%

Source: Statistics Canada, Federal Reserve Bank, Old Dominion University Economic Forecasting Project

The rate of growth of income in Ontario and Quebec has fallen steadily since its recent peak in 2005. Ontario has been plagued by the loss of manufacturing jobs, especially in the auto industry, and Quebec has had economic problems with its manufacturing, forest and paper industries.

A declining income growth rate tends to reduce travel, while Canadian currency appreciations act to increase visitors to Virginia Beach. The net effect of these two important economic determinants of travel to Virginia Beach was a slight increase in the proportion of Canadian visitation in the summer of 2008 when compared to that of 2007. Importantly, the level of summer 2008 Canadian visitation was not far off from the relative peaks set in the summer of 2005 and 2006, during which time residents of Ontario and Quebec experienced better income growth.

## ***Visitor Travel Patterns***

### ***Tunnels***

An important characteristic of the stable geographic visitor market is that year-in and year-out roughly nineteen of every twenty summer visitors arrive by car. This characteristic has helped to insulate Virginia Beach's tourist industry from the problems that have plagued air travel since 9/11.

However, about two of every three visitors travel through the Hampton Roads Bridge Tunnel, which is becoming a progressively more time consuming transit for visitors. Despite the increasing travel time for visitors using the I-64 tunnel, they have shown little inclination to use either the I-664 (Monitor-Merrimac Bridge Tunnel) or Chesapeake Bay Bridge Tunnel alternatives. About one in every forty-five 2008 summer visitors arrived via I-664 and slightly less than one in four crossed the Bay Bridge Tunnel, proportions that are *virtually the same* as those in 1998, the first full summer of operation for the I-664 crossing. Given that four of every

five visitors is a repeat visitor and therefore likely possess some knowledge of the areas traffic patterns, the reluctance of visitors to use the I-64 tunnel alternatives suggests that, at least to date, the time consumed crossing through the I-64 tunnel is not offset by what may be perceived by visitors to be the increased distance, inconvenience and cost of the potential alternatives.

### *Gas Prices*

Since 1997 summer visitors to Virginia Beach have traveled an average distance that varies little between years and hovers around 400 miles per visit. Some people in the Virginia Beach tourist industry have been concerned by rapidly rising gasoline prices over the past few years and, given the almost complete dependence of the industry on visitors arriving by automobile, the affect these price increases might have on their sales.

Displayed in the accompanying chart are the changes in gasoline prices and lodging revenue since 1997. Inspection of the chart suggests that between 1997 and 2008, over the gasoline price range shown (\$1.21 to \$4.05 for regular), there does not appear to be a negative correlation between Virginia Beach lodging revenue and gas prices.

These data are particularly surprising when the previous analysis of the effect of gasoline prices on overall household budgets is taken into consideration. There are several possible reasons for Virginia Beach's continued summer revenue growth despite consistent large increases in gas prices through 2008. First, because of higher prices and waiting times, visitors may be shunning air travel to distant markets. For example the 2008 visitor survey shows a significant drop in the number of visitors considering Orlando as an alternative to their Virginia Beach vacation.

Second, Virginia Beach has been able to capture some of the visitor market from its nearby competitors. Summer 2008 STR hotel revenue data, discussed above, indicate that is possible at least in 2008. Third, primary summer vacations are considered a necessity by households in the Virginia Beach summer visitor market area.

**Virginia Beach Lodging Revenue and National Gasoline Prices (June, Selected Years)**

	<b>1997</b>	<b>2002</b>	<b>2007</b>	<b>2008</b>
<b>Average U.S. Price Per Gallon Regular Gasoline (June)</b>	\$1.21	\$1.39	\$3.16	\$4.05
<b>Lodging Revenue (Millions)</b>	\$84.2	\$109.0	\$145.1	\$151.3

Source: U.S. Department of Energy, City of Virginia Beach and the Old Dominion University Economic Forecasting Project

## ***Internet Search and Purchase***

### ***The Basic Data***

Internet search far-and-away dominates the sources of information *actively sought* by Virginia Beach summer visitors. Furthermore, a new question in this year's summer visitor survey suggests that a considerable portion of visitors, 42 percent, read online reviews of Virginia Beach.

Given the Internet's near total penetration and availability to U.S households and the current level of Internet technology, Internet search for information by potential visitors to Virginia Beach continues to increase and as of the summer of 2008 is employed by more than four of every five visitors.

### **Proportion of Virginia Beach Summer Overnight Visitors Who Obtained Vacation Information and Those Who Purchased Travel Services on The Internet (1999 to 2008)**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
<b>Used Internet to obtain Vacation Information</b>	45.5%	65.2%	65.8%	71.3%	72.5%	75.3%	80.0%	78.3%	76.8%	83.7%
<b>Used Internet to Purchase some Travel Service</b>	---	12.5%	19.8%	24.3%	27.8%	34.5%	39.3%	39.5%	46.5%	52.8%

More importantly, along with an increase in the proportion of summer visitors searching for information, the proportion of visitors purchasing part of their vacation services over the Internet rose considerably between the summer of 2007 and 2008. More than half of all visitors used the Internet to purchase travel services for their visit to Virginia Beach.

## ***Demographics and Purchase: Age, Income and Spending***

### ***The Basic Data***

As was the case with the general U.S. population, from the mid-1990s to 2004, summer visitors had been slowly graying as the average age of the head of visitor parties rose from the high thirties to the low-mid forties. This process appears to have run its course as the average age of a visitor has leveled out over the five summer period from 2004 to 2008 at roughly 43 to 44 years of age.

### **Proportion of Summer Overnight Visitors in Selected Age, Income and Spending Categories (2004 and 2008)**

	<b>Proportion 2004</b>	<b>Proportion 2008</b>
<b>Age Categories</b>		
55 or older	18.3%	18.7%
45 or older	48.2%	48.8%
35-44	30.7%	26.7%
18-34	21.1%	24.5%
<b>Income Categories</b>		
Over \$125,000	15.4%	19.6%
Under \$40,000	13.2%	10.3%
<b>Spending Categories</b>		
Over \$1,000	57.3%	72.0%
Under \$500	14.3%	7.0%

However, as seen in the accompanying chart, over the past five years there has been a fairly substantial alteration in the *age distribution* of overnight visitors. At the extreme ends of the distribution, older and younger visitors have increased their proportional representation over the past five years. These increases have come at the expense of visitors in the 35 to 44 age category.

Based on U.S. Census data and the Virginia Beach summer visitor survey, the *median* household income of Virginia Beach visitors is roughly 60 percent greater than that of the median household income in the U.S. Almost half of 2008 overnight visitors had income above \$85,000 dollars. Furthermore, in 2008 about one in every five visitors had income greater than \$125,000, a significant gain over the 2004 proportion. At the opposite end of the summer visitor income distribution, the proportion of visitors with income less than \$40,000 had been reduced to 10.3 percent or by twenty-two percent when compared with 2004 proportion.

## ***The Visitor Experience: Perceptions of Virginia Beach***

### ***Visitor Perceptions Scorecard***

Because the subjective reaction of overnight visitors to elements of their vacation experience is one key to the average visitor's level of satisfaction and an implicit measurement of the quality of the "beach vacation" product as seen through the eyes of Virginia Beach's customers, as with past reports we pay close attention to these perceptions. The accompanying "perception

scorecard” allows for both a sense of how 2008’s visitors perceived their experience of Virginia Beach as well as a comparison with past summers.

### **Summer Overnight Visitor Perception Scorecard**

	<b>1988</b>	<b>1995</b>	<b>2000</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
<b>Visually Appealing</b>	2.01	1.82	1.59	1.60	1.56	1.51
<b>Family-Oriented</b>	1.84	1.55	1.52	1.43	1.47	1.45
<b>Clean</b>	1.85	1.59	1.59	1.55	1.59	1.53
<b>Safe</b>	1.75	1.75	1.69	1.66	1.65	1.59

Scale: 1= extremely; 2 =quite; 3 =slightly; 4=not at all

The 2008 scorecard reinforces the possibilities highlighted by the summer 2007 scorecard. Specifically, that the increasingly positive visitor perceptions of Virginia Beach experienced since the late 1980’s have peaked at a relatively high level. A corollary to this observation is that the long-term and consistent increase of repeat visitation experienced since the early 1990’s has reached its maximum. As seen in the repeat visitor chart, the repeat visitor rate appears to have peaked at around 78 to 80 percent -- the repeat visitor rates experienced generally between 2003 and 2008.

### **Proportion of Repeat Summer Overnight Visitors**

<b>1988</b>	<b>1995</b>	<b>2000</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
61.0%	68.6%	73.6%	78.2%	77.6%	75.3%	80.9%	79.3%	78.7%

In summary, Virginia Beach appears to have a loyal following of summer visitors whose perceptions of a number of measures of the quality of their “beach vacation” have become relatively stable; neither rising nor falling.

***End Note:***

*In our analysis of industry revenue performance we use tax data where possible. When tax data are unavailable or where optimal statistical method requires strict methodological comparison (apples to apples), as is sometimes the case when creating ratios where method used in estimating the numerator requires employment of the same method in the denominator, we use data sources other than taxes such as STR. The same methodological issues apply to the use of data for comparative purposes, as for example, comparing data between geographic regions. It is important to note that even the use of tax data many times constitutes an estimate of business activity because the tax data themselves may not be all inclusive.*

## **Tourist Market Area**

- In 2008, the metropolitan areas of Washington, D.C. and Richmond were the two largest identifiable markets. Together they accounted for more than one in four visitors.
- Visitors traveled an average of 419 miles.
- Slightly less than three of every five visitors traveled more than 300 miles.
- Although most visitors in 2007 traveled a considerable distance, one of every three visitors was from Virginia.
- About one in every 11 visitors came from Canada.
- About nine of every ten visitors begin their visit from points around an axis which originates in Virginia Beach and passes through metropolitan Washington, D.C. to Ottawa, Canada.

## **Demographic Characteristics**

- Roughly three of every four visitor parties were headed by a visitor 35 or older.
- More than three of every five visitors had yearly family income over \$75,000.
- Median visitor income was about 60 percent greater than median U.S. family income.
- Almost one in every five visitors had income above \$125,000.
- About three of every four visitors were married, and about three of every five visitors were accompanied by children 18 years of age or younger.
- Slightly less than half of visitors had four or more years of college compared with about one in four nationally.

## Visitor Characteristics

- Two of every five visitors stayed five or more nights.
- Two of every three visitors came in parties of two to four people.
- One in every four visitors came on a weekend trip.
- Four of every five visitors had previously vacationed in Virginia Beach.
- Ninety-five of every one hundred visitors come by private vehicles and two of every three transit via the I-64 tunnel.
- Roughly one in five visitors crossed the Chesapeake Bay Bridge Tunnel.
- About one in every seven visitors went to Busch Gardens, while one in ten visited Williamsburg.
- More than half of visitors patronized local shopping malls.
- The top five close-in attractions in order of importance to visitors were the Virginia Aquarium & Marine Science Center, Ocean Breeze Park, Busch Gardens, the Old Coast Guard Station and Williamsburg.
- Beach cleanliness heads the list of factors people liked most about Virginia Beach.
- Traffic, from tunnel delays to local traffic on Atlantic and Pacific Avenues, leads the list of identifiable factors people liked least about Virginia Beach.
- One in three visitors indicated considerable difficulty with local traffic.
- More than half of visitors used the Boardwalk or Atlantic Avenue after 10 P.M.

## **Visitor Spending Patterns**

- Each visitor spent an average of \$108 per day.
- About seventy-six cents of each dollar spent by visitors was spent on lodging and restaurants.
- More than nine out of ten visiting parties spent more than \$500 while slightly less than three of every four parties spent over \$1,000 during their visit.
- Total spending was greatest for those who stayed in cottages, condos and motels/ hotels and least for those who stayed with friends/relatives and in campgrounds.
- Visitors with incomes greater than \$60,000 spent about 10 percent more during their visit than those with incomes of \$40,000 or less. Visitors with income over \$125,000 spent about 20 percent more than those with incomes between \$50,000 and \$125,000.
- Visitors 35 years of age or older spent an average of 15 percent more than those visitors under 35.

## **Information Sources and Plans of Visitors**

- Of those visitors who considered visiting other resorts, slightly more than half considered vacationing in Myrtle Beach or Ocean City.
- Slightly more than half of visitors spent more than one month planning for their visit.
- Less than half of all visitors heard or read an advertisement for Virginia Beach.
- About four of every five visitors got information about Virginia Beach from the Internet.
- More than fifty percent of visitors purchased some travel service on the Internet.
- Slightly less than nine of every ten visitors made reservations prior to arriving in Virginia Beach.
- More than nine of every ten visitors plan to visit again within the next two years.

## **Comparison of the 2004, 2005, 2006, 2007 and 2008 Visitor Surveys by Selected Characteristics**

In comparing visitor data over the past five years an important aspect to note is the variation in the data over the period.

### Example of consistent data over the period are:

- \* visitors staying in hotels/motels stay roughly four days.
- \* mean party size has remained fairly stable at approximately 4 people per party.
- \* three of every four visitors are married.
- \* three of every five visiting parties bring children.
- \* Myrtle Beach and Ocean City are the prime competitors with Virginia Beach in the summer visitor market.
- \* length of stay over the five-year period from 2004 to 2008 has varied between 4.3 and 5.0 nights.
- \* Metropolitan Washington, D.C. has remained the top identifiable origination point for Virginia Beach visitors.
- \* Weekend visitors account for 20 percent of the visitor market.
- \* Repeat visitors account for roughly four of every five visitors.

### Examples of data which have varied and showed directional trends over the 2004 to 2008 period are:

- Since 2004, visitor annual household income has risen from \$80,058 to \$85,928.
- Since 2004 the proportion of visitor parties spending over \$1,000 per visit has grown from 57.3% in 2004 to 72.0% in 2008.
- Since 2004 per-person per-day spending has risen by about 38%.

- 83.7% of visitors got information from the Internet in 2008 compared to 75.3% of visitors in 2004.
- From 2004 to 2008 visitors purchasing some portion of their vacation via the Internet rose from 34.5% to 52.8%.

**BOARDWALK**  
**SURVEY**

**TOURIST MARKET  
AREA**

# PERCENTAGE OF 2008 TOTAL VISITATION TO VIRGINIA BEACH BY DMA\* IN DESCENDING ORDER

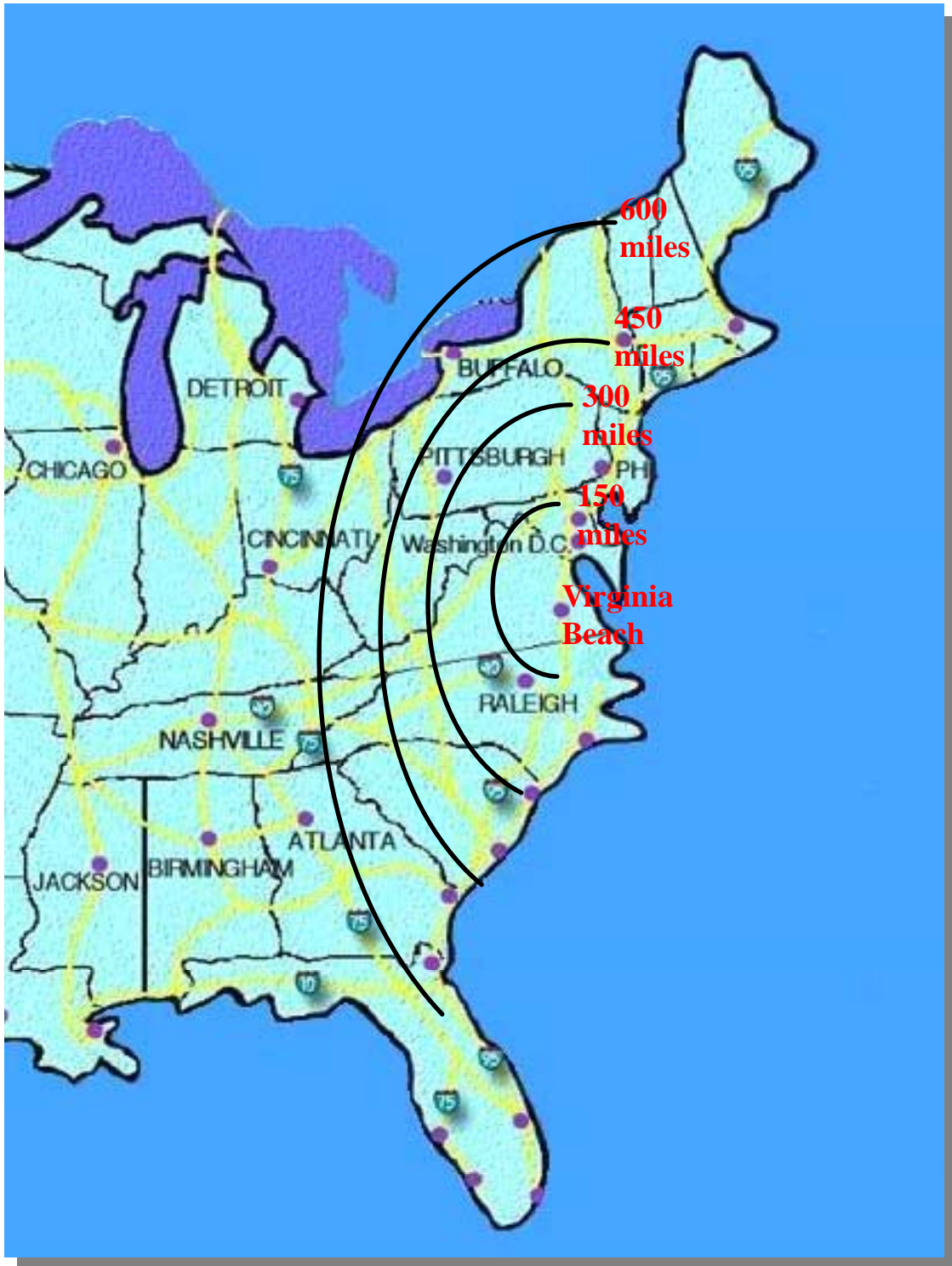
<u>DMA</u>	<u>Percent of Visitors</u>	<u>DMA</u>	<u>Percent of Visitors</u>
Washington, DC	15.9	St. Louis, MO	1.2
Richmond-Petersburg, VA	12.7	Wheeling-Steubenville, WV	1.2
New York, NY	6.9	Boston, MA Charlotte, NC	1.1
Roanoke-Lynchburg, VA	6.4	Clarksburg-Weston, WV	1.1
Philadelphia, PA	5.3	Johnstown-Altoona, PA	1.1
Pittsburgh, PA	5.3	Buffalo, NY	0.9
Baltimore, MD	4.1	Louisville, KY	0.9
Cleveland, OH	3.0	Springfield-Holyoke, MA	0.9
Columbus, OH	2.5	Greensboro-H. Point-W. Salem, NC	0.8
Norfolk-Portsmouth-Newport News, VA	2.3	Los Angeles, CA	0.8
Harrisburg-Lancaster-Leb-York, PA	1.9	Toledo, OH	0.8
Wilkes Barre-Scranton, PA	1.9	Youngstown, OH	0.8
Charleston-Huntington, WV	1.6	Cincinnati, OH	0.7
Hartford & New Haven, CT	1.6	Burlington-Plattsburgh, VT	0.5
Albany-Schenectady-Troy, NY	1.3	Chicago, IL	0.5
Bluefield-Beckley-Oak Hill, WV	1.3	Elmira, NY	0.5
Harrisonburg, VA	1.2	Syracuse, NY	0.5
Raleigh-Durham, NC	1.2		

\* A Designated Market Area (DMA) represents a central media marketing unit. Counties are assigned to a DMA where the majority of broadcast viewing originates.

\*\* This DMA consists of 1,912,000 households located in 16 Virginia, 8 Maryland, 6 West Virginia and 1 Pennsylvania county as well as the District of Columbia.

\*\*\* For this DMA, the county breakdown is as follows: 14 New York, 13 New Jersey, 1 Connecticut and 1 Pennsylvania

# DISTANCE RINGS FROM VIRGINIA BEACH



## DISTRIBUTION OF DISTANCE TRAVELED BY VISITORS

<u>Distance Traveled</u>	<u>Percent</u>
Under 150 miles	11.0
150-299 miles	34.0
300-449 miles	20.4
450-599 miles	15.7
600-749 miles	14.0
Over 750 miles	4.9
Total	100.0%

The average distance traveled by visitors in 2008 was 419 miles

## PERCENTAGE OF 2008 TOTAL VISITATION TO VIRGINIA BEACH BY STATE IN DESCENDING ORDER\*

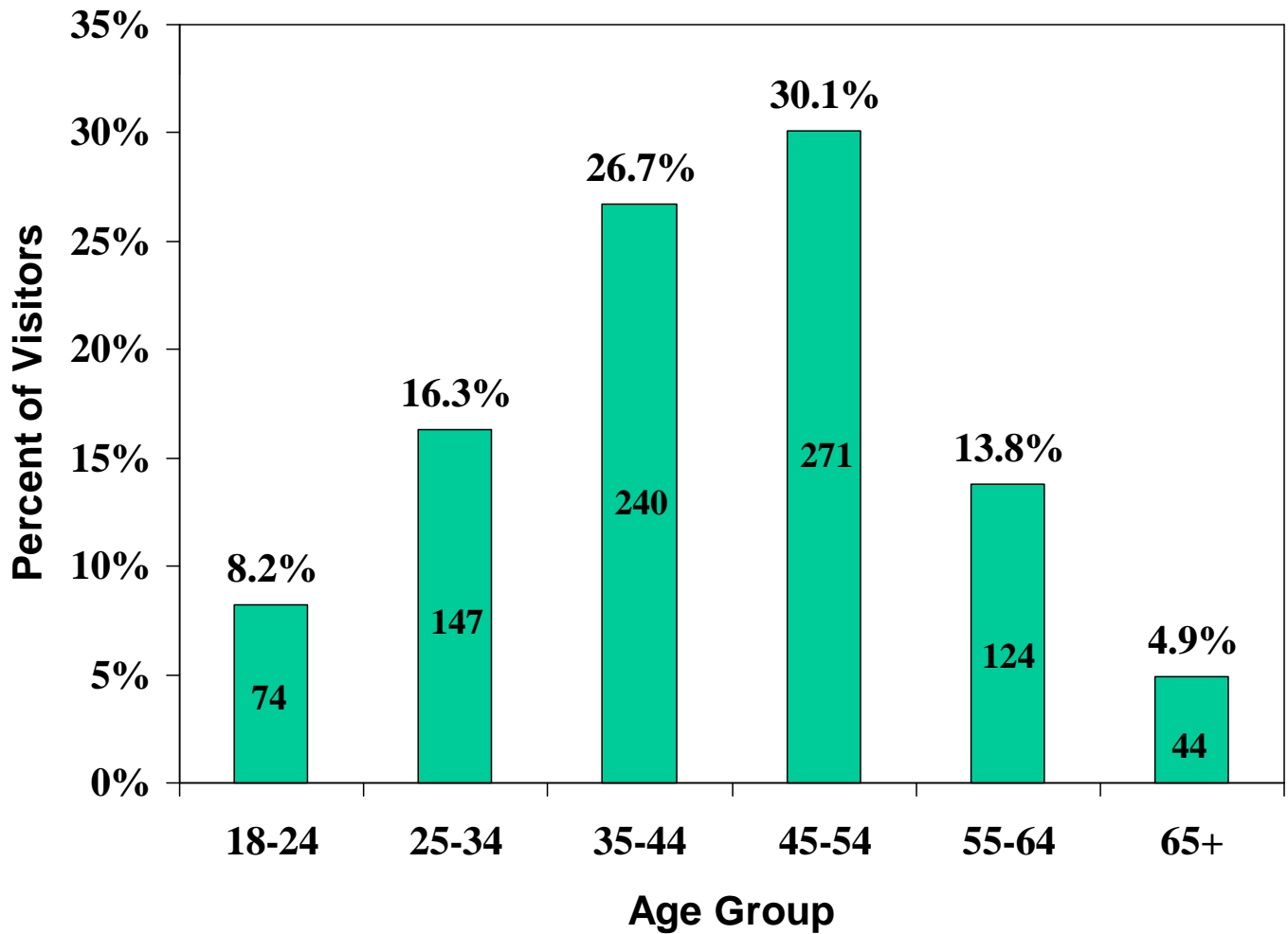
<u>State</u>	<u>Percent of Visitors</u>	<u>State</u>	<u>Percent of Visitors</u>
Virginia	31.3	California	1.0
Pennsylvania	13.0	Missouri	1.0
Ohio	7.9	Illinois	0.8
New York	7.3	Indiana	0.8
Maryland	6.8	Tennessee	0.8
West Virginia	4.3	DC	0.7
New Jersey	3.0	Florida	0.7
North Carolina	2.7	Michigan	0.6
Massachusetts	1.8	Georgia	0.4
Connecticut	1.4	Vermont	0.4
Kentucky	1.4	Delaware	0.3

\* 8.6 percent of visitors were from Canada

# **BOARDWALK** **SURVEY**

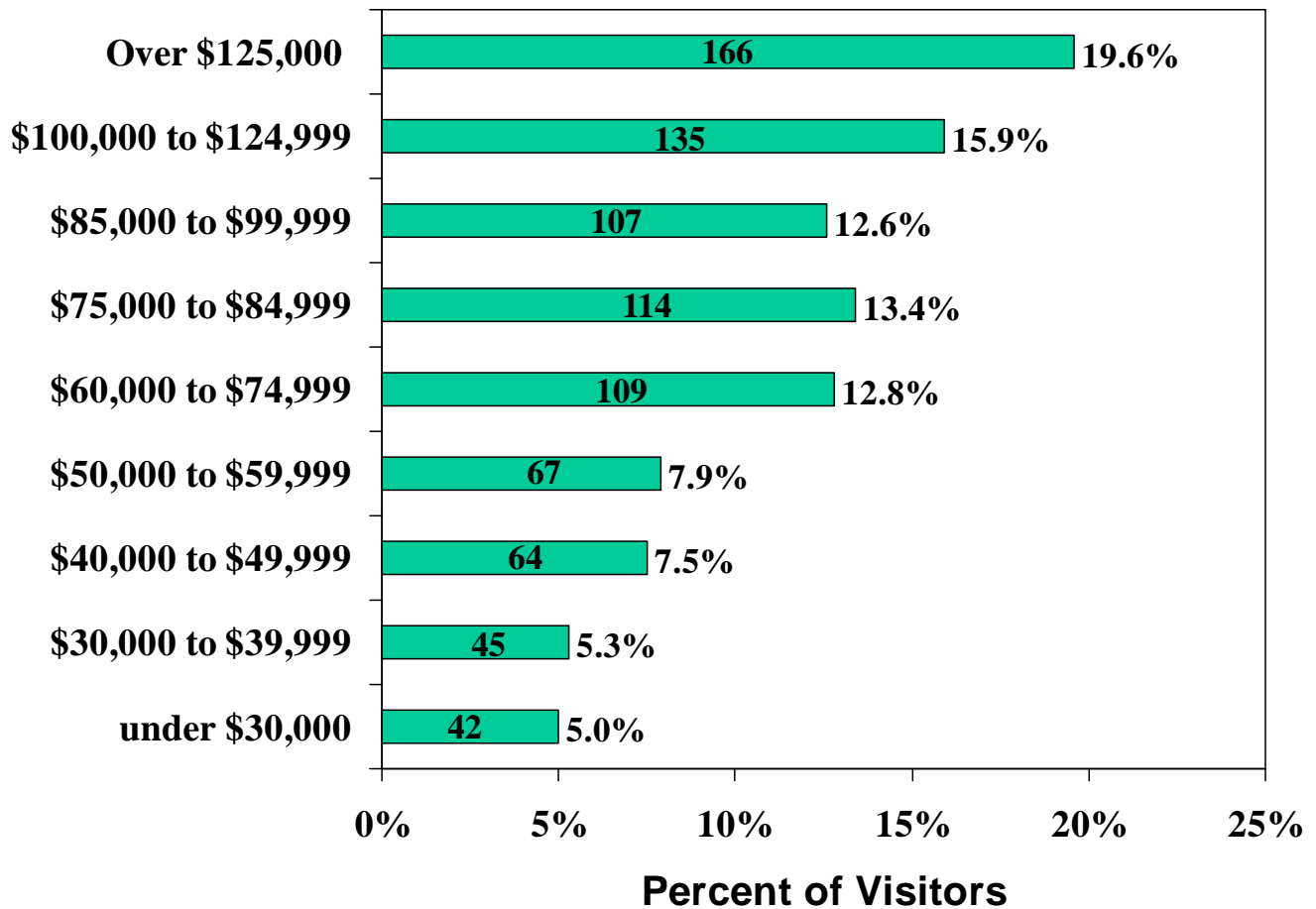
## **DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

# AGE



Total number of visitors is 900. The average age of visitors is 43.3 years. Nearly fifty-seven percent of visitors belong to the 35 to 54 years old age group.

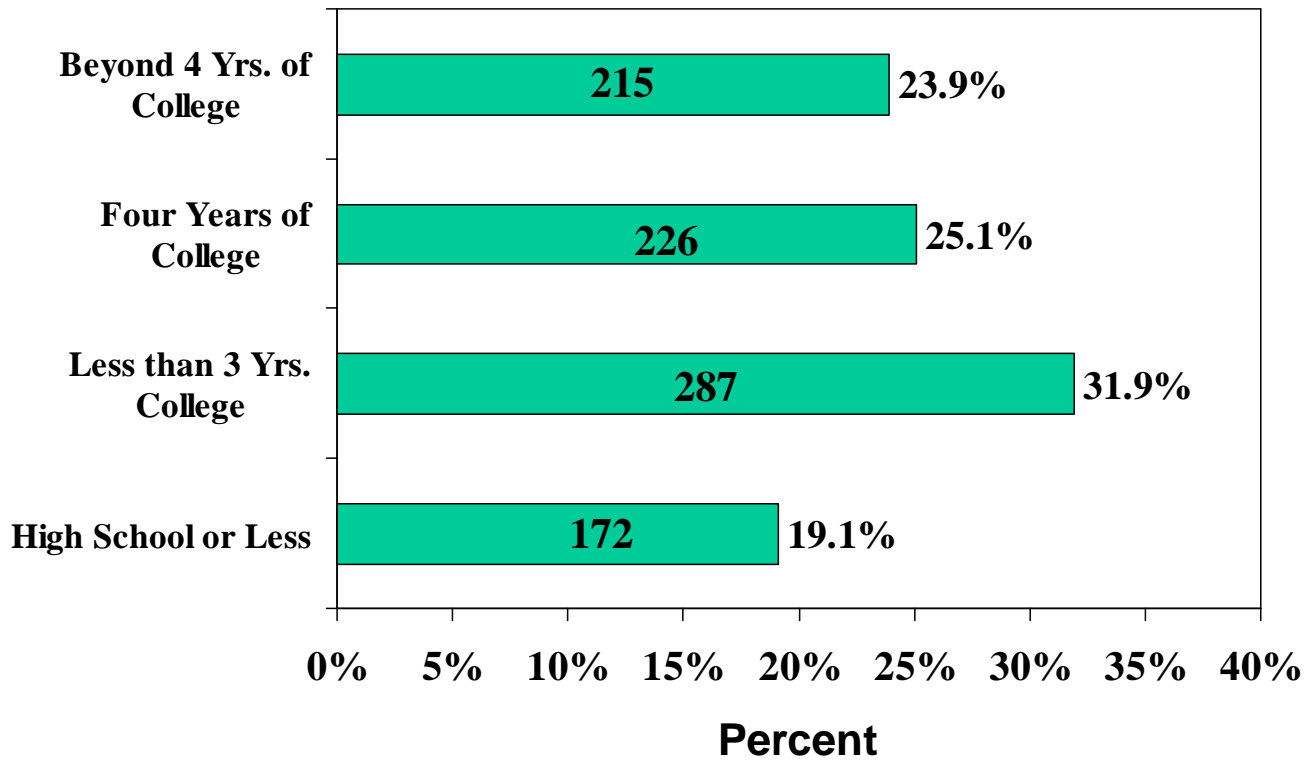
# DISTRIBUTION OF INCOME OF VISITORS



Total number of observations is 849\*. Average household income of visitors is \$85,928. Only 5.0 percent earned less than \$30,000.

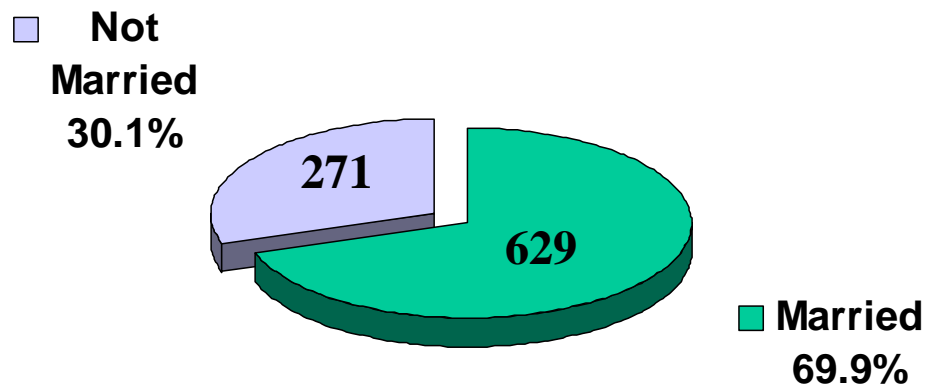
\* Fifty-one visitors did not respond to this question.

# VISITORS' EDUCATION LEVELS



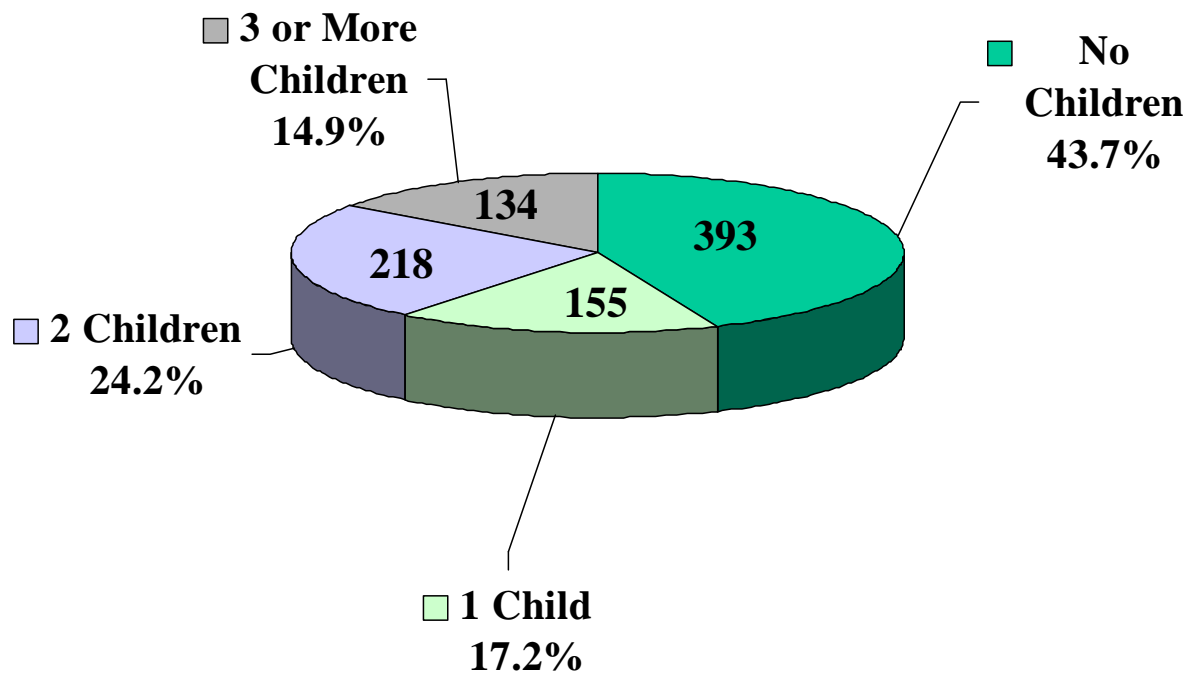
The number of observations is 900.

# MARITAL STATUS



The number of observations is 900.  
Seven of every ten visitors are married.

# DISTRIBUTION OF VISITORS WITH CHILDREN

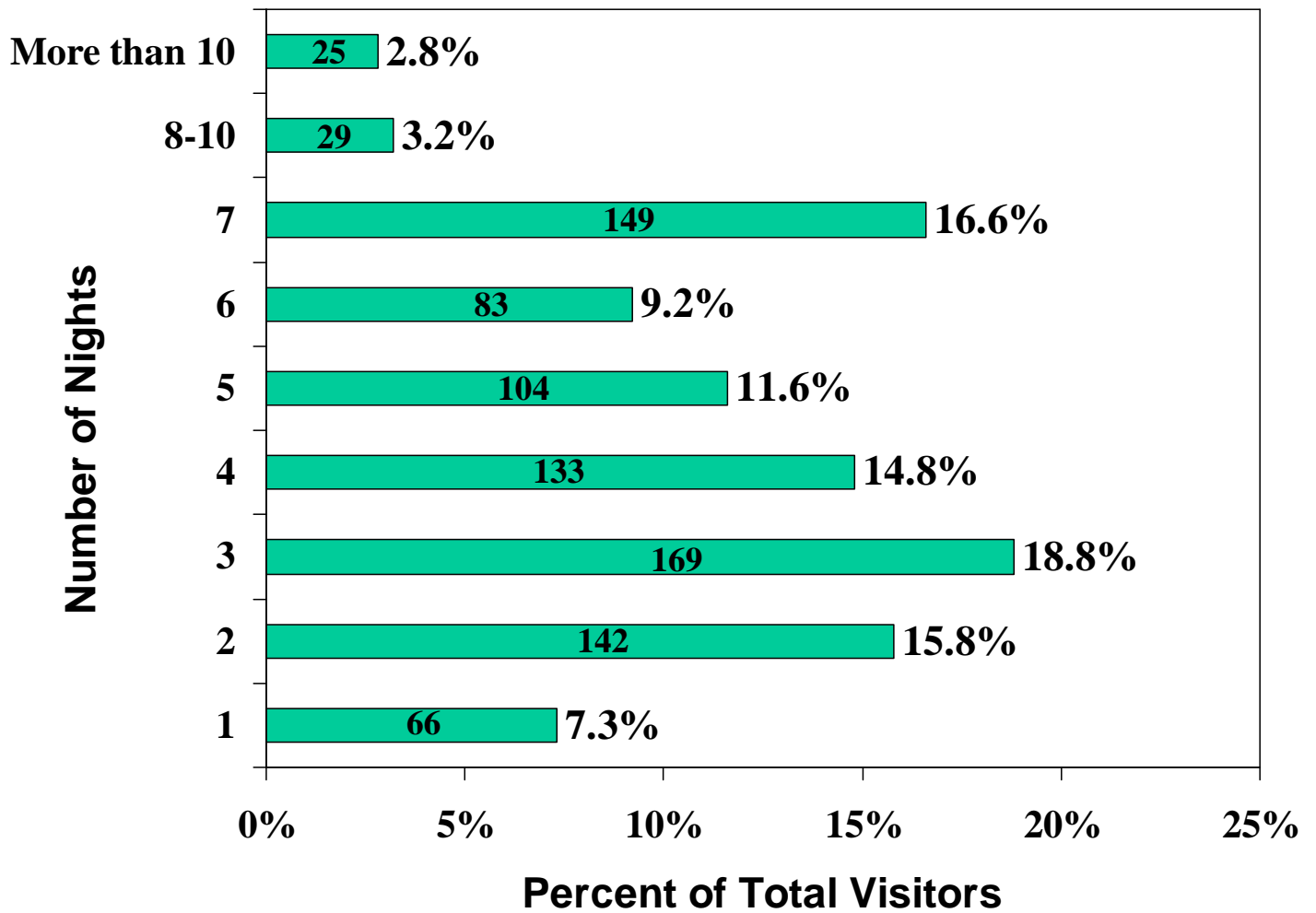


The number of observations is 900.  
Nearly sixty percent visitors are accompanied by children.

# **BOARDWALK** **SURVEY**

## **VISITOR** **CHARACTERISTICS**

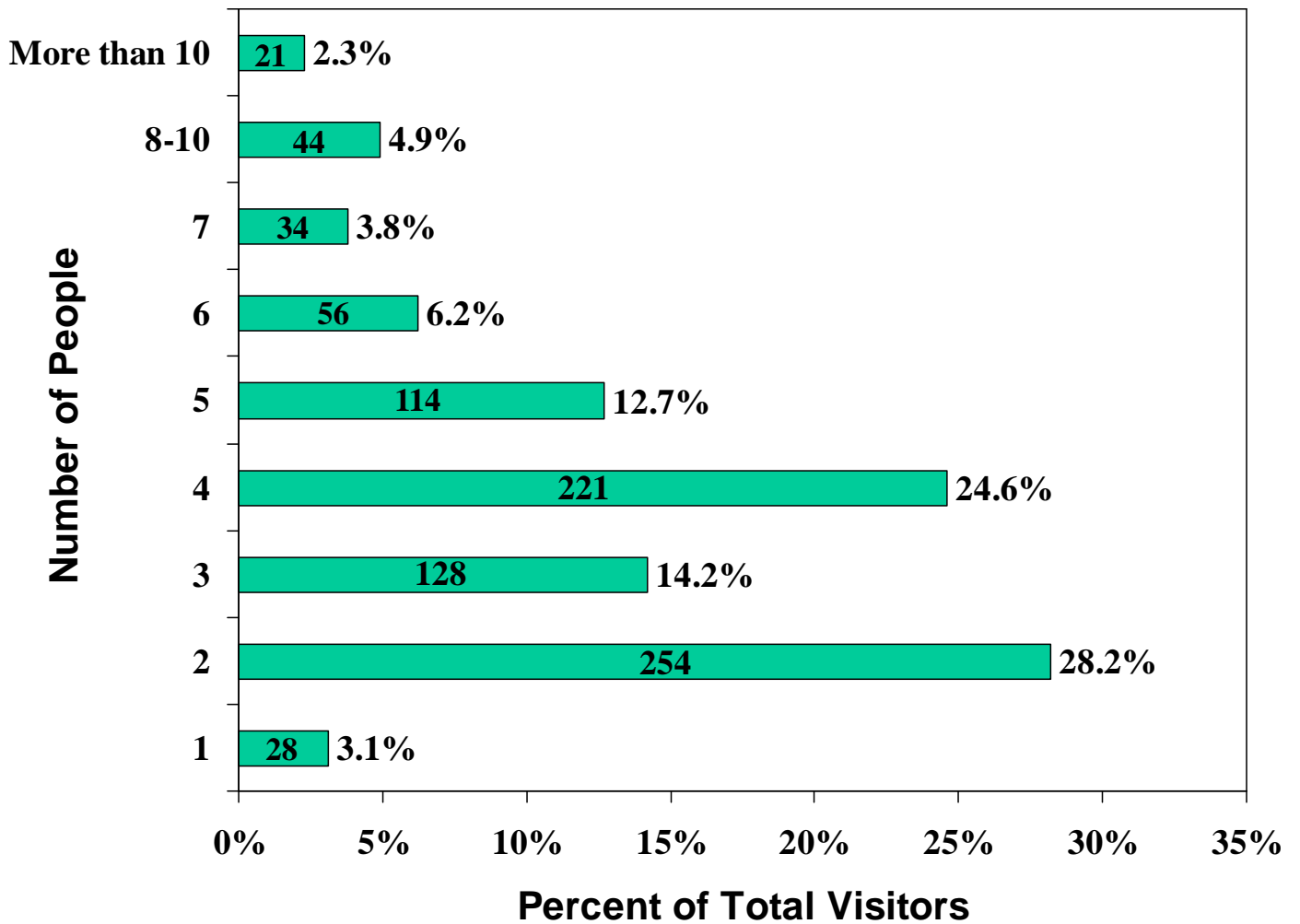
# DISTRIBUTION OF VISITORS BY LENGTH OF STAY



The number of observations is 900.

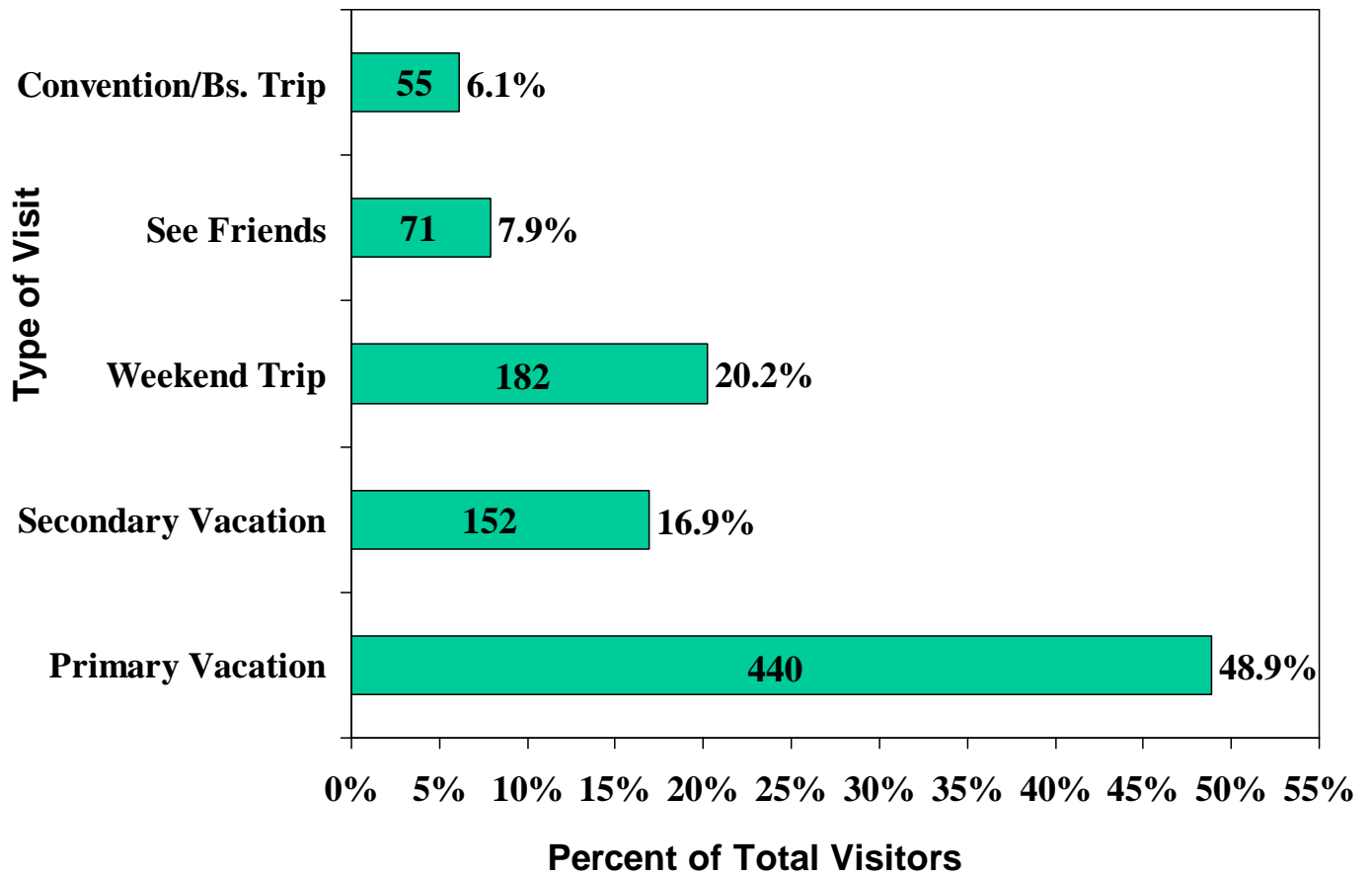
The average length of stay is 4.6 nights

# DISTRIBUTION OF VISITORS BY NUMBER OF PEOPLE IN PARTY



The number of observations is 900.  
The average party size is 4.0 people.

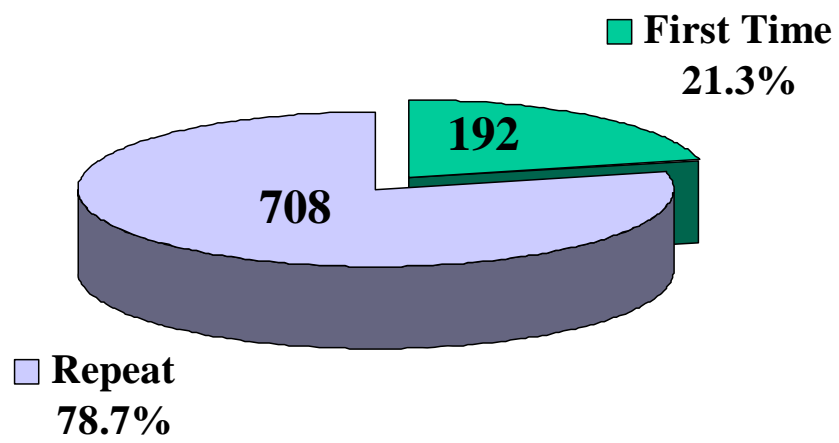
# TYPE OF VISIT



The number of observations is 900.

Almost sixty-six percent of visitors came to Virginia Beach on a vacation trip.

## DISTRIBUTION OF REPEAT AND FIRST TIME VISITORS



The number of observations is 900.

Almost eighty percent of tourists are repeat visitors.

## DISTRIBUTION OF VISITORS BY TYPE OF ACTIVITY ENGAGED IN OTHER THAN THE BEACH

<u>Activity</u>	<u>Number</u>	<u>Percent</u>
Go to Malls	452	50.2
Visit Virginia Aquarium & Marine Science Center	231	25.7
Visit Ocean Breeze Park	151	16.8
Visit Busch Gardens	141	15.7
Go Fishing	122	13.6
Visit Old Coast Guard Station	108	12.0
Visit Williamsburg	96	10.7
Play Golf	86	9.6
Go to Parks*	63	7.0
Water Country in Williamsburg	51	5.7
Go to Nauticus	47	5.2
Visit AARE	12	1.3

Fifty percent of visitors go for shopping to malls. \* Parks mean Back Bay, False Cape or Seashore State Park.

## VISITORS' MODE OF TRANSPORTATION

<u>Transportation</u>	<u>Number</u>	<u>Percent</u>
Auto/Camper/Motorcycle	854	94.9
Airplane	39	4.3
Bus/Train	6	0.7
Boat	1	0.1
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

Ninety-five percent of visitors travel to Virginia Beach in a private vehicle.

## VISITORS' ROUTE OF TRAVEL

	<u>Number</u>	<u>Percent</u>
Chesapeake Bay Bridge Tunnel	202	23.7
I-64 Tunnel	553	64.7
I-664 Tunnel	19	2.2
Other	80	9.4
<b>TOTAL</b>	<b>854</b>	<b>100.0%</b>

Sixty-five percent of visitors travel on I-64 to get to Virginia Beach.

## NUMBER OF VISITS TO VIRGINIA BEACH THIS YEAR

<u>Number of Visits</u>	<u>Number</u>	<u>Percent</u>
One time only	687	76.3
Two times	113	12.6
Three times	47	5.2
Four times	19	2.1
Five or more times	34	3.8
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

Twenty-four percent of visitors plan to visit Virginia Beach at least one more time during 2008.

# WHAT VISITORS LIKE BEST ABOUT VIRGINIA BEACH

	<u>Number</u>	<u>Percent</u>		<u>Number</u>	<u>Percent</u>
Clean beach	207	23.0	Lots within walking distance	19	2.1
Nice beach	123	13.7	Security	14	1.6
Nice boardwalk	102	11.3	Close to friends family	9	1.0
Family oriented	75	8.3	Good shopping nearby	9	1.0
Close to home	65	7.2	Life guards	9	1.0
Nice ocean	38	4.2	Bike paths Nice hotels	7	0.8
Like beach St USA	29	3.2	Good restaurants	7	0.8
Relax peaceful	26	2.9	Good singles life	6	0.7
Clean city	24	2.7	Good weather	6	0.7
Hotel on beach	24	2.7	Not too commercial	6	0.7
Uncrowded beach	24	2.7	Beautiful area	5	0.6
Friendly people	23	2.6	Easy to get around	5	0.6
Lots to do nearby	19	2.1	Not too expensive	4	0.4
			<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

Twenty-three percent of visitors state that the one thing they like best is the clean and good beaches.

# WHAT VISITORS LIKE LEAST ABOUT VIRGINIA BEACH

	<u>Number</u>	<u>Percent</u>		<u>Number</u>	<u>Percent</u>
Like everything	154	17.1	Too many bikes/roller blades	13	1.4
Too expensive	92	10.2	Bad weather	11	1.2
Too crowded	66	7.3	Condo sales hassle people	11	1.2
Don't like hotel/campground	63	7.0	Not enough to do	10	1.1
Too much traffic near strip	45	5.0	Too many people smoking	10	1.1
Traffic/tunnel delays to VBCH	44	4.9	Safety concern	9	1.0
Noisy area jets overhead	35	3.9	Dirty beach dog poop etc	8	0.9
Parking difficulties	35	3.9	Smoke from wildfires bothersome	8	0.9
Jellyfish insects etc	29	3.2	No grocery store nearby	7	0.8
Too far from home	27	3.0	Noisy nights	6	0.7
Need more/better restaurants	26	2.9	Too many rules on beach	6	0.7
Too commercial	22	2.4	Can't drink alcohol outside	5	0.6
Ocean was not nice	21	2.3	Not family oriented need more for kids	5	0.6
Need better shops on Atlantic Ave.	16	1.8	Rundown area/dirty looking	5	0.6
Not enough nightlife	15	1.7	Signage difficulties	5	0.6
Parking fee too high	15	1.7	Unfriendly people	5	0.6
Not enough pub restrooms	14	1.6	Miscellaneous	44	4.9
Rude noisy people	13	1.4	<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

## VISITORS' AVERAGE RATING OF VIRGINIA BEACH RESORT AREA ON SELECTED CRITERIA

<u>Criteria</u>	<u>Average Rating</u>
Clean	1.53
Family-Oriented	1.45
Visually Appealing	1.51
Crowded	2.64
Safe	1.59
Comfortable	1.35
Exciting	1.76
Rowdy	3.40

Scale 1=extremely; 2=quite; 3=slightly; 4=not at all

## VISITORS' RATING OF TRAFFIC DIFFICULTIES

<u>Rating</u>	<u>Number</u>	<u>Percent</u>
No difficulty	171	19.0
	183	20.3
	283	31.4
	154	17.1
Lots of difficulty	109	12.1
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

Visitors' rating is represented in the form of a scale variable which takes values from 1 to 5 where 1 means no difficulty and 5 means many difficulties

## VISITORS' RATING OF PARKING DIFFICULTIES

<u>Rating</u>	<u>Number</u>	<u>Percent</u>
No Difficulty	274	45.7
	86	14.3
	137	22.8
	63	10.5
Lots of Difficulty	40	6.7
<b>TOTAL</b>	<b>600*</b>	<b>100.0%</b>

\* 600 Visitors were asked this question.

Visitors' rating is represented in the form of a scale variable which takes values from 1 to 5 where 1 means no difficulty and 5 means many difficulties

# SELECTED AVERAGES BY MONTH

	<u>Jun 08</u>	<u>Jul 08</u>	<u>Aug 08</u>	<u>Summer 08</u>
<b>Nights spent</b>				
Mean	4.1	5.0	4.8	4.6
Median	4.0	4.0	4.0	4.0
<b>Number in Party</b>				
Mean	3.9	4.0	4.2	4.0
Median	3.0	4.0	4.0	4.0
<b>Age</b>				
Mean	43.7	43.2	42.9	43.3
Median	44.0	44.0	44.0	44.0
<b>Income</b>				
Mean	\$84,956	\$84,007	\$88,830	\$85,928
Median	\$80,000	\$80,000	\$92,500	\$80,000
<b>Expenses/Party</b>				
Mean	\$1,831	\$2,078	\$2,071	\$1,993
Median	\$1,490	\$1,710	\$1,600	\$1,600
<b>Total Cost of all Vacation</b>				
Mean	\$2,142	\$2,512	\$2,367	\$2,340
Median	\$1,710	\$2,150	\$2,100	\$2,000

## VISITORS' RATING OF VIRGINIA BEACH

<u>Rating</u>	<u>Number</u>	<u>Percent</u>
Great	533	59.2
Very Good	304	33.8
Good	56	6.2
OK	7	0.8
Not good	0	0.0
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

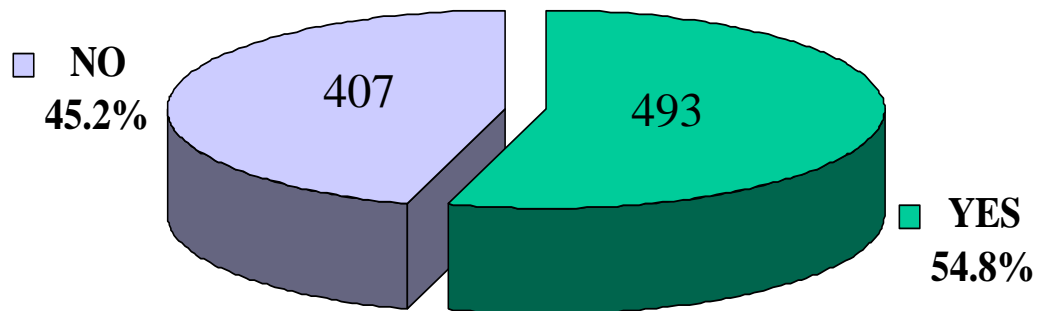
More than ninety percent of visitors said that Virginia Beach is a very good or a great place to visit.

## VISITORS' RATING OF COST OF HOTEL ROOMS

<u>Rating</u>	<u>Number</u>	<u>Percent</u>
Very reasonable	46	9.9
Reasonable	291	62.4
Expensive	108	23.2
Very expensive	21	4.5
<b>TOTAL</b>	<b>466*</b>	<b>100.0%</b>

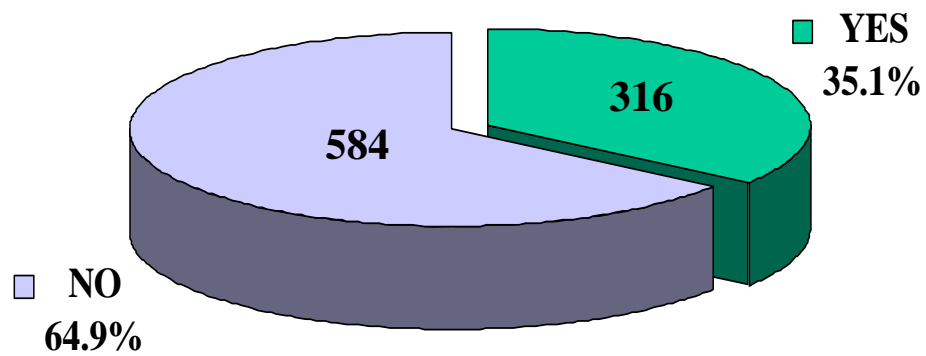
Nearly 72 percent of visitors rated cost of hotel rooms as being reasonable or very reasonable. \*Only 466 visitors staying in hotels/motels were asked this question.

# VISITORS GOING TO ATLANTIC AVENUE OR THE BOARDWALK AFTER 10 P.M.



The number of observations is 900.

# VISITORS GOING TO ATLANTIC AVENUE OR THE BOARDWALK AFTER 8 P.M. ON SATURDAYS

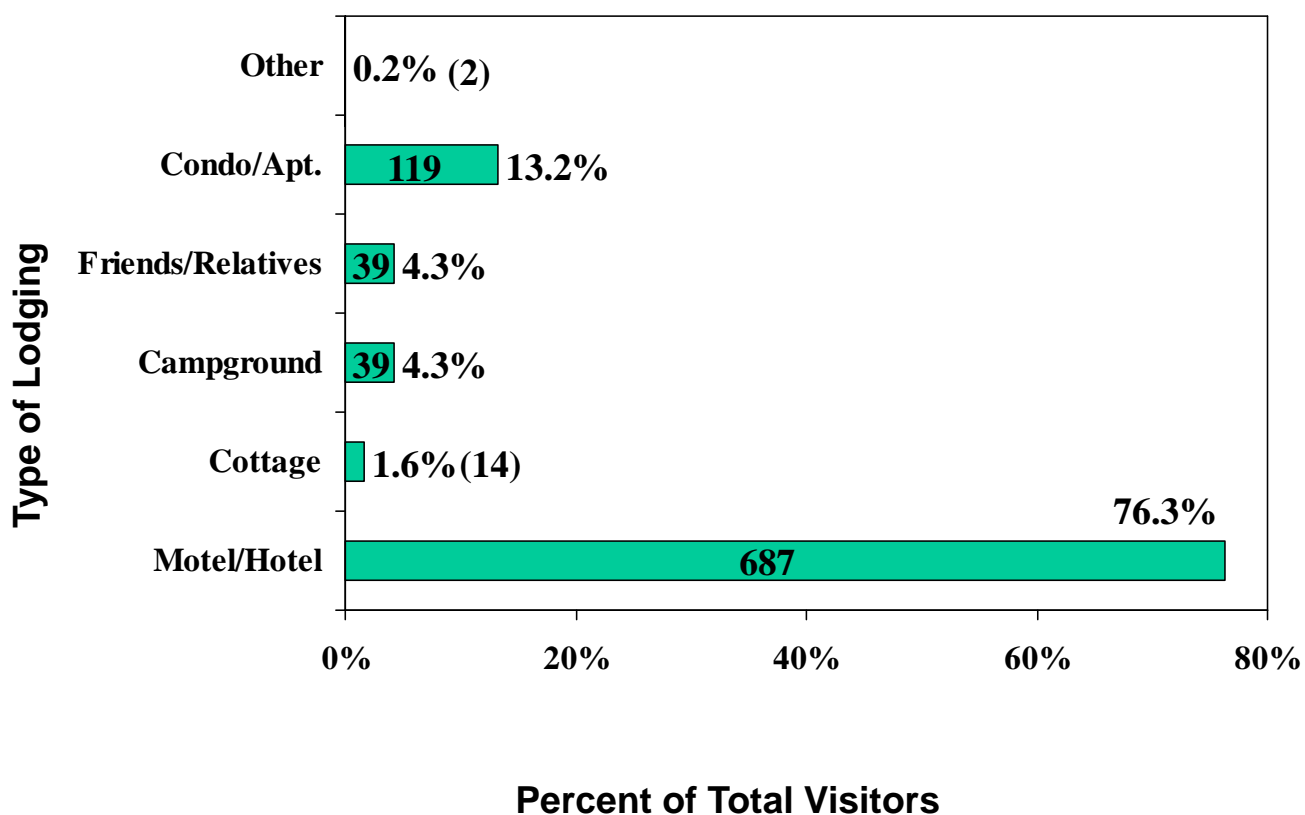


The number of observations is 900.

**BOARDWALK**  
**SURVEY**

**SELECTED**  
**CHARACTERISTICS OF**  
**VISITORS**  
**BY TYPE OF LODGING**

# DISTRIBUTION OF VISITORS BY TYPE OF LODGING



The number of observations is 900.  
Seventy-six percent of visitors stay at a hotel or motel.

## INCOME OF VISITORS BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Average Income</u>
Motel/Hotel	\$84,479
Cottage	\$96,731
Campground	\$90,946
Friends/Relatives	\$78,243
Condo/Apartment	\$94,282

Visitors staying in cottages have the highest average income.

## VISITORS' LENGTH OF STAY BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Average Nights Stayed</u>
Motel/Hotel	4.1
Cottage	6.7
Campground	9.6
Friends/Relatives	3.6
Condo/Apartment	6.1

Visitors staying with friends and relatives stay the least number of nights.

## FUTURE VISITATION PLANS BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Percent Not Likely to Visit Again</u>
Motel/Hotel	7.9
Cottage	1.6
Campground	4.3
Friends/Relatives	5.1
Condo/Apartment	13.2

## AVERAGE AGE OF VISITORS BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Visitors' Average Age</u>
Motel/Hotel	43.1
Cottage	42.4
Campground	41.0
Friends/Relatives	36.1
Condo/Apartment	47.3

Visitors staying in condo/apartments are slightly older.

## MARITAL STATUS OF VISITORS BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Percent Married</u>
Motel/Hotel	70.3
Cottage	57.1
Campground	64.1
Friends/Relatives	56.4
Condo/Apartment	74.8

## PARTY SIZE OF VISITORS BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Average Party Size</u>
Motel/Hotel	3.9
Cottage	6.6
Campground	4.4
Friends/Relatives	3.1
Condo/Apartment	4.9

Average party size is smallest for those staying with friends or relatives.

## VISITORS WITHOUT CHILDREN BY TYPE OF LODGING

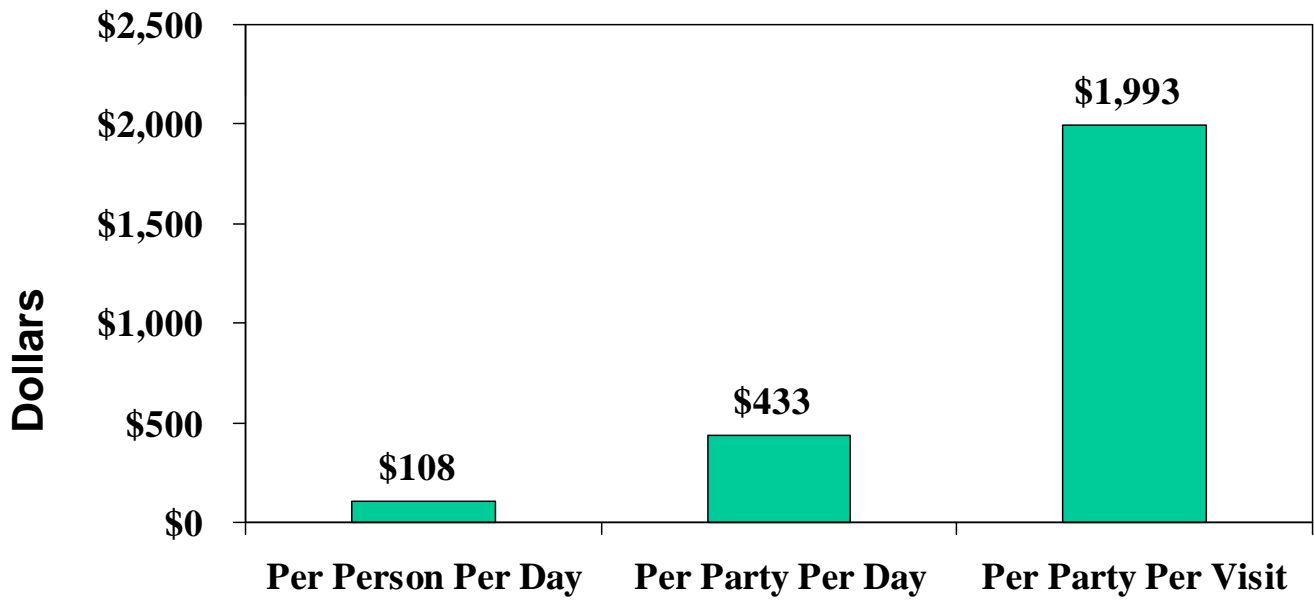
<u>Type of Lodging</u>	<u>Percent Without Children</u>
Motel/Hotel	43.7
Cottage	28.6
Campground	46.2
Friends/Relatives	64.1
Condo/Apartment	37.8

Sixty-four percent of visitors staying with friends and families are not accompanied by children.

**BOARDWALK**  
**SURVEY**

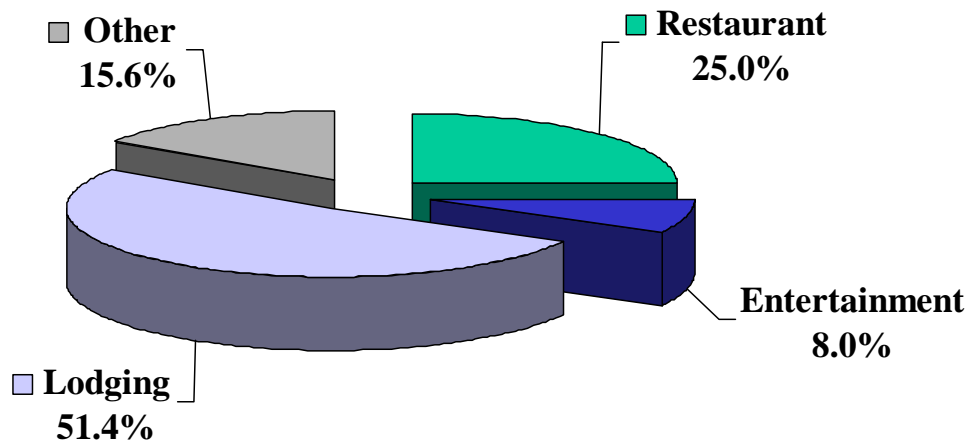
**VISITORS' SPENDING**  
**PATTERNS**

# AVERAGE VISITORS SPENDING IN VIRGINIA BEACH



Visitors spend an average of \$1,993 during their trip to Virginia Beach.

# BREACKDOWN OF VISITOR SPENDING BY PURCHASE CATEGORY



Three-quarters of visitor spending is for lodging and restaurants.

## VISITOR CHARACTERISTICS BY TOTAL SPENDING

<u>Characteristics</u>	<u>Over \$1,000</u>	<u>\$500- \$1,000</u>	<u>\$250- \$499</u>	<u>Less than \$250</u>
Nights Stayed	5.5	2.8	1.6	2.2
Party Size	4.5	3.1	2.4	2.7
Stayed in Hotel	77%	84%	71%	9%
Visited Busch Gardens or Williamsburg	23%	15%	7%	9%
Sports (Golf, Fishing)	23%	13%	22%	9%
Visit Virginia Aquarium	31%	15%	7%	5%

Visitors who spend over \$1,000 per day on their visit, tend to stay in hotels, visit area attractions, have larger party size and stay longer than those at the lower end of the spending categories.

## DISTRIBUTION OF TOTAL SPENDING

<u>Total Spending</u>	<u>Number</u>	<u>Percent</u>
Over \$1,000	648	72.0
\$500 to \$1,000	189	21.0
\$250 to \$499	41	4.6
Under \$250	22	2.4
TOTAL	900	100.0%

The single largest group of visitors spend over \$1,000 during their visit. Nearly ninety-three percent of visitors spend over \$500 during their visit.

## TOTAL SPENDING BY TYPE OF LODGING

<u>Type of Lodging</u>	<u>Total Spending</u>	<u>Number</u>	<u>Percent</u>
Motel/Hotel	\$1,878	687	76.3
Cottage	\$4,670	14	1.6
Campground	\$1,389	39	4.3
Friends/Relatives	\$435	39	4.3
Condo/Apartment	\$3,064	119	13.2

Total visitor spending is greatest for those staying in cottages and least for those staying with Friends or Relatives.

## TOTAL SPENDING BY INCOME OF VISITORS

<u>Income</u>	<u>Total Spending</u>	<u>Number</u>	<u>Percent</u>
Under \$30,000	\$1,647	42	5.0
\$30,000 to \$39,999	\$1,801	45	5.3
\$40,000 to \$49,999	\$1,735	64	7.5
\$50,000 to \$59,999	\$1,771	67	7.9
\$60,000 to \$74,999	\$1,946	109	12.8
\$75,000 to \$84,999	\$1,903	114	13.4
\$85,000 to \$99,999	\$1,876	107	12.6
\$100,000 to \$124,999	\$2,175	135	15.9
Over \$125,000	\$2,358	166	19.3
<b>TOTAL</b>		<b>849*</b>	<b>100.0%</b>

Visitors typically spend more as income increase.

\* Fifty-one visitors did not respond to this question.

## TOTAL SPENDING BY AGE OF VISITORS

<u>Age</u>	<u>Total Spending</u>	<u>Number</u>	<u>Percent</u>
18 to 24	\$1,568	74	8.2
25 to 34	\$1,745	147	16.3
35 to 44	\$2,145	240	26.7
45 to 54	\$2,015	271	30.1
55 to 65	\$2,123	124	13.8
65 and over	\$2,207	44	4.9
<b>TOTAL</b>		<b>900</b>	<b>100.0%</b>

Older visitors tend to spend more.

## TOTAL SPENDING BY MARITAL STATUS OF VISITORS

<u>Marital Status</u>	<u>Spending</u>	<u>Number</u>	<u>Percent</u>
Married	\$2,093	629	69.9
Unmarried	\$1,762	271	30.1
TOTAL		900	100.0%

Married visitors typically spend more.

## TOTAL SPENDING BY NUMBER OF VISITORS WITH CHILDREN

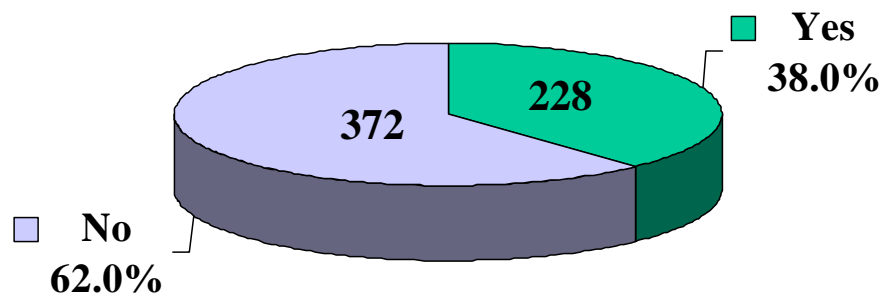
<u>Number of Children</u>	<u>Total Spending</u>	<u>Number</u>	<u>Percent</u>
None	\$1,619	393	43.7
One	\$1,879	155	17.2
Two	\$2,149	218	24.2
Three or more	\$2,969	134	14.9
<b>TOTAL</b>		<b>900</b>	<b>100.0%</b>

Visitor spending consistently increases as the number of children in their party increases. Visitors with three or more children spend nearly \$1,300 more than visitors without children.

# **BOARDWALK** **SURVEY**

## **INFORMATION SOURCES AND PLANS OF VISITORS**

## VISITORS SELECTING VIRGINIA BEACH OVER OTHER RESORTS



The number of observations is 600.  
Thirty-eight percent of visitors selected Virginia Beach over other resorts.

## OTHER RESORTS CONSIDERED BY VISITORS

<u>Resort Considered</u>	<u>Number</u>	<u>Percent</u>
Myrtle Beach	76	33.3
Ocean City	47	20.6
Nags Head & Outer Banks	34	14.9
Florida	14	6.1
Atlantic City/Jersey Shore	18	7.9
Delaware	3	1.3
Others	36	15.8
<b>TOTAL</b>	<b>228</b>	<b>100.0%</b>

Myrtle Beach and Ocean City are the primary resorts in competition with Virginia Beach.

## ADVANCE PLANNING BY VISITORS

<u>Number of Months</u>	<u>Number</u>	<u>Percent</u>
1 or less	406	45.1
1 to 2 months	134	14.9
2 to 3 months	83	9.2
3 to 4 months	48	5.3
4 to 5 months	23	2.6
5 to 6 months	84	9.3
7 or more	122	15.6
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

About forty-five percent of visitors plan their trip to Virginia Beach within one month of their visit.

**DISTRIBUTION OF VISITORS BY  
HEARING OR READING  
ADVERTISEMENTS  
FOR VIRGINIA BEACH**

	<u>Number</u>	<u>Percent</u>
Yes	395	43.9
No	505	56.1
<b>TOTAL</b>	<b>900</b>	<b>100.0%</b>

**DISTRIBUTION OF VISITORS  
CALLING  
OR WRITING FOR INFORMATION  
PRIOR TO VISITING VIRGINIA  
BEACH**

	<u>Number</u>	<u>Percent</u>
Yes	214	35.7
No	386	64.3
<b>TOTAL</b>	<b>600*</b>	<b>100.0%</b>

\* 600 Visitors were asked this question.

# DISTRIBUTION OF VISITORS GETTING INFORMATION FROM INTERNET

	<u>Number</u>	<u>Percent</u>
Yes	502	83.7
No	98	16.3
<b>TOTAL</b>	<b>600*</b>	<b>100.0%</b>

\* 600 Visitors were asked this question.

# DISTRIBUTION OF VISITORS READING ON-LINE REVIEWS ABOUT VIRGINIA BEACH

	<u>Number</u>	<u>Percent</u>
Yes	252	42.0
No	348	58.0
<b>TOTAL</b>	<b>600*</b>	<b>100.0%</b>

\* 600 Visitors were asked this question.

## **VISITORS PURCHASING SOME TRAVEL SERVICE ON THE INTERNET**

	<u>Number</u>	<u>Percent</u>
Yes	317	52.8
No	283	47.2
<b>TOTAL</b>	<b>600*</b>	<b>100.0%</b>

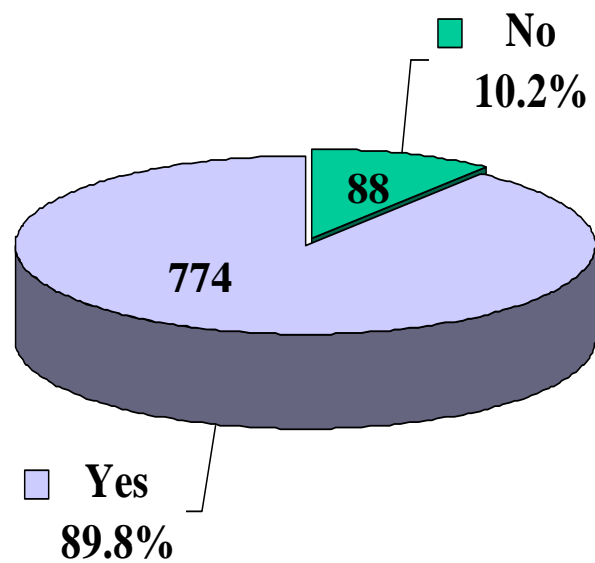
\* 600 Visitors were asked this question.

## PRIMARY REASONS FOR ATTRACTION TO VIRGINIA BEACH FOR FIRST TIME VISITORS

<u>Reasons</u>	<u>Number</u>	<u>Percent</u>	<u>Reasons</u>	<u>Number</u>	<u>Percent</u>
MAN MADE ENVIRONMENT	20	16.7	PROXIMITY	44	36.7
Had Business in Va. Beach	3		Close to Home	32	
On Route to Destination	3		Close to Friends/Family	12	
Close to Williamsburg	3		EMOTIONAL	32	26.7
Inexpensive	1		Friends Recommended	32	
Came for an Event	5		OTHERS	5	4.2
Time Share	4		Advertisement	3	
Naval Base	1		Someone else decided	2	
NATURAL	19	15.8			
Sunny Weather	4				
Try this Beach	15		<b>TOTAL</b>	<b>120*</b>	<b>100.0%</b>

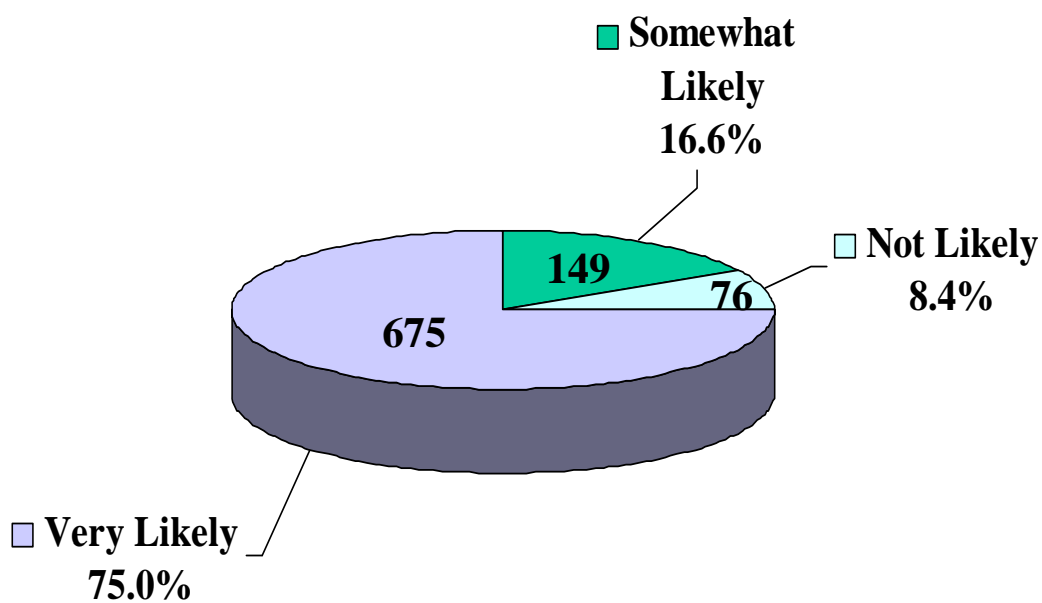
\* Only 120 first time visitors were asked this question.

# VISITORS MAKING RESERVATIONS PRIOR TO THE TRIP



The number of observations is 862.  
Ninety percent of visitors make reservations prior to their trip.

# PLANS OF TOURISTS TO VISIT AGAIN IN THE NEXT TWO YEARS



The number of observations is 900.

Nearly ninety percent of visitors are likely to visit again in the next two years.

# **BOARDWALK** **SURVEY**

## **COMPARISON OF 2004, 2005, 2006, 2007 AND 2008 VISITOR SURVEYS BY SELECTED CHARACTERISTICS**

## **DISTRIBUTION OF VISITORS BY AGE**

<u>Age Group</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
18 to 24	6.8%	5.5%	6.3%	8.8%	8.2%
25 to 34	14.3	16.9	14.1	12.2	16.3
35 to 44	30.7	29.3	34.8	30.0	26.7
45 to 54	29.9	33.3	29.2	32.6	30.1
55 or over	18.3	15.0	15.6	16.4	18.7
Number of Observations	900	900	900	900	900
Average Age	43.9	43.3	43.2	43.4	43.3

# DISTRIBUTION OF VISITORS' INCOME

<u>Income Class</u>	<u>PERCENT OF VISITORS</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Under \$30,000	5.4%	4.8%	4.4%	6.3%	5.0%
\$30,000 to \$39,999	7.8	7.1	6.2	6.9	5.3
\$40,000 to \$49,999	9.5	9.0	9.3	8.4	7.5
\$50,000 to \$59,999	8.9	11.9	10.2	10.4	7.9
\$60,000 to \$74,999	15.4	14.0	16.0	13.6	12.8
\$75,000 to \$84,999	12.9	10.3	9.9	10.6	13.4
\$85,000 to \$99,999	11.3	11.7	11.3	12.7	12.6
\$100,000 to \$124,999	13.4	12.4	15.2	14.5	15.9
Over \$125,000	15.4	18.9	17.6	16.6	19.6
Number of observations	856	878	842	859	849
Average income	\$80,058	\$81,990	\$82,803	\$81,382	\$85,928

## MARITAL STATUS

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Married	73.8%	74.2%	74.2%	72.8%	69.9%
Unmarried	26.2	25.8	25.8	27.2	30.1
Number of observations	900	900	900	900	900

Nearly than seventy percent of visitors are married.

## DISTRIBUTION OF VISITORS WITH CHILDREN

<u>Number of Children</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
None	41.2%	37.0%	41.8%	43.3%	43.7%
One	17.0	16.0	16.6	17.0	17.2
Two	26.5	27.6	24.8	22.5	24.2
Three or more	15.3	19.4	16.8	17.2	14.9
Number of observations	900	900	900	900	900

More than half of the visitors are accompanied by children.

## DISTRIBUTION OF VISITORS BY LENGTH OF STAY

<u>Number of Nights</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
One	6.7%	5.2%	8.1%	8.0%	7.3%
Two	14.3	18.3	19.3	18.2	15.8
Three	21.0	18.7	19.6	19.2	18.8
Four	14.9	16.0	13.8	14.0	14.8
Five to seven	35.5	34.2	33.2	36.1	37.4
Eight or more	7.7	7.6	6.0	4.5	6.0
Number of observations	900	900	900	900	900
Average length of stay	5.0 nights	4.6 nights	4.3 nights	4.4 nights	4.6 nights

## DISTRIBUTION OF VISITORS BY NUMBER OF PEOPLE IN PARTY

<u>Number of People</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
One	3.1%	2.4%	2.3%	2.7%	3.1%
Two	29.0	26.1	28.1	29.3	28.2
Three	15.2	12.4	15.0	14.2	14.2
Four	24.9	28.4	25.0	24.2	24.6
Five	11.3	12.8	12.7	10.6	12.7
Six or more	16.4	17.8	16.9	19.0	17.2
Number of observations	900	900	900	900	900
Average party size	3.9 people	4.1 people	4.0 people	4.0 people	4.0 people

Average party size has remained fairly stable at approximately 4.0.

## TYPE OF VISITORS

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Weekend trip	20.7%	18.2%	21.7%	23.0%	20.2%
Primary vacation	47.3	43.9	45.5	47.0	48.9
Secondary vacation	14.2	19.0	14.0	14.7	16.9
Stopover on a longer trip	3.7	3.4	4.7	N/A	N/A
To visit friends	9.4	9.4	9.1	11.3	7.9
Convention/business	4.7	6.0	5.0	4.0	6.1
Number of observations	900	900	900	900	900

Nearly sixty percent of visitors come to Virginia Beach for a vacation.

# DISTRIBUTION OF VISITORS BY TYPES OF ACTIVITIES ENGAGED IN OTHER THAN THE BEACH

<b><u>Activity</u></b>	<b><u>2004</u></b>	<b><u>2005</u></b>	<b><u>2006</u></b>	<b><u>2007</u></b>	<b><u>2008</u></b>
Visit Busch Gardens	15.8%	17.2%	16.9%	13.7%	15.7%
Visit Colonial Williamsburg	12.4	10.3	10.1	9.0	10.7
Go Fishing	14.9	12.6	15.3	12.2	12.2
Play Golf	8.0	6.0	7.8	7.0	9.6
Visit Virginia Aquarium	26.7	24.8	26.7	24.0	25.7
Visit Old Coast Guard Station	10.8	8.4	11.0	9.6	12.0
Visit Ocean Breeze Park	20.1	16.1	16.1	15.7	16.8
Go to Malls	54.2	53.8	53.4	54.8	50.2
Visit Nauticus	7.2	7.1	5.6	3.4	5.2
Number of observations	900	900	900	900	900

Note: Figures are the percentage who said “Yes” to these activities. Further, the percentages may add to more than 100% due to multiple responses.

## VISITORS' MODE OF TRANSPORTATION

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Auto/camper truck/motorcycle	94.7%	95.9%	95.9%	95.0%	94.9%
Bus/Amtrak	0.5	0.8	0.6	0.6	0.7
Airplane	4.8	3.2	3.4	4.4	4.3
Number of observations	900	900	900	900	900

More than ninety percent of visitors travel in a private vehicle.

## VISITORS AVERAGE RATINGS OF VIRGINIA BEACH ON SELECTED CRITERIA

<u>Criteria</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Clean	1.50	1.55	1.55	1.59	1.53
Family-oriented	1.42	1.44	1.43	1.47	1.45
Visually appealing	1.50	1.56	1.60	1.56	1.51
Safe	1.57	1.62	1.66	1.65	1.59

Note: Sample sizes may vary because “don’t know” answers have been excluded. However, excluded observations are very few.

Scale: 1=Extremely; 2=Quite; 3=Slightly; 4=Not at all

## NUMBER OF TIMES TO VIRGINIA BEACH THIS YEAR

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
One time only	77.2%	79.1%	75.5%	76.2%	76.3%
Two times	12.1	12.7	13.7	13.7	12.6
Three times	6.9	4.0	5.3	5.1	5.2
Four times	1.4	1.4	2.2	1.8	2.1
Five or more times	2.4	2.8	2.3	3.2	3.8
Number of observations	900	900	900	900	900

Most visitors plan to visit Virginia Beach only one time during the summer they arrive.

## DISTRIBUTION OF VISITORS BY TYPES OF LODGING

<u>Lodging</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	75.2%	75.3%	73.7%	75.0%	76.3%
Cottage	1.5	1.0	0.8	1.0	1.6
Campground	3.3	7.5	5.1	5.8	4.3
Friends/family	8.1	5.9	6.6	6.4	4.3
Condo/Apartment	11.7	10.3	13.8	11.6	13.2
Other	0.2	0.0	0.1	0.2	0.2
Number of observations	900	900	900	900	900

Seventy-five percent of visitors have tended to stay in a motel/hotel.

## VISITORS LENGTH OF STAY BY TYPE OF LODGING

<u>Lodging</u>	<u>Average Nights Stayed</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	4.2	3.9	3.7	4.0	4.1
Cottage	13.5	6.6	8.6	9.9	6.7
Campground	8.0	7.8	6.1	6.0	9.6
Friends/family	6.2	5.4	4.7	3.9	3.6
Condo/Apartment	7.5	7.1	6.4	6.1	6.1

## VISITORS INCOME BY TYPE OF LODGING

<u>Lodging</u>	<u>Average Income</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	\$79,408	\$82,169	\$82,339	\$81,221	\$84,479
Cottage	79,808	75,556	78,929	88,611	96,731
Campground	67,232	76,530	75,568	77,000	90,946
Friends/ Family	65,607	73,269	69,107	71,557	78,243
Condo/ Apartment	98,837	90,245	94,735	88,240	94,282

## AVERAGE AGE OF VISITORS BY TYPE OF LODGING

<u>Lodging</u>	<u>Average Age</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	44 years	43 years	43 years	43 years	43 years
Cottage	41	44	37	40	42
Campground	40	43	42	43	41
Friends/family	40	41	43	40	36
Condo/Apartment	49	47	48	47	47

## VISITORS WITHOUT CHILDREN BY TYPE OF LODGING

<u>Percentage of Visitors Without Children</u>					
<u>Lodging</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	40.8%	36.3%	41.3%	43.7%	43.7%
Cottage	23.1	44.4	14.3	11.1	28.6
Campground	43.3	31.3	30.4	40.4	46.2
Friends/ Family	56.2	56.6	61.0	60.3	64.1
Condo/ Apartment	35.2	34.4	40.3	34.6	37.8

## MARITAL STATUS OF VISITORS BY TYPE OF LODGING

<u>Percentage of Visitors Who Are Married</u>					
<u>Lodging</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	74.0%	74.2%	74.5%	72.9%	70.3%
Cottage	76.9	66.7	71.4	66.7	57.1
Campground	66.7	71.6	69.6	73.1	64.1
Friends/ Family	56.2	67.9	52.5	60.3	56.4
Condo/ Apartment	87.6	80.7	84.7	78.9	74.8

## PARTY SIZE OF VISITORS BY TYPE OF LODGING

<u>Lodging</u>	<u>Average Party Size</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Motel/hotel	3.9	4.0	3.9	3.9	3.9
Cottage	6.2	4.1	6.6	7.1	6.6
Campground	4.2	4.4	4.1	4.4	4.4
Friends/ Family	2.9	3.6	3.2	3.2	3.1
Condo/ Apartment	4.6	4.4	4.6	4.8	4.9

## DISTRIBUTION OF VISITORS BY SPENDING CATEGORY IN VIRGINIA BEACH

<u>Type of Expenditure</u>	<u>Percentage of Spending</u>				
	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Lodging	53.3%	50.0%	50.8%	52.2%	51.4%
Restaurants	25.5	26.0	25.1	25.1	25.0
Entertainment	8.1	8.8	9.3	8.4	8.0
All other expenses	13.1	15.2	14.8	14.3	15.6

## AVERAGE VISITORS SPENDING IN VIRGINIA BEACH

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Per part in Va. Beach	\$1,519	\$1,707	\$1,655	\$1,657	\$1,993
Per party/ per day	304	371	385	377	433
Per person/ per day	78	90	96	94	108

## DISTRIBUTION OF SPENDING OF VISITORS IN VIRGINIA BEACH

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Over \$1,000	57.3%	64.1%	63.9%	65.6%	72.0%
\$500 to \$1,000	28.0	25.7	25.5	22.6	21.0
\$250 to \$499	9.7	8.4	7.9	8.4	4.6
Under \$250	4.6	1.8	2.7	3.4	2.4

# VISITORS SELECTING VIRGINIA BEACH OVER OTHER RESORTS

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Yes	40.0%	39.7%	33.0%	37.2%	38.0%
No	60.0	60.3	67.0	62.8	62.0
Number of observations	600	600	600	600	600

## OTHER RESORTS CONSIDERED BY VISITORS

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Ocean City, MD	22.1%	25.2%	31.8%	25.1%	20.6%
Myrtle Beach, SC	32.5	30.3	32.3	30.9	33.3
Nags Head, NC	13.3	9.2	10.6	10.3	14.9
Atlantic City/NJ Shore	5.8	10.1	6.6	5.4	7.9
New England	2.1	3.4	0.5	1.8	4.0
Florida	8.8	5.9	6.1	10.3	6.1
Number of observations	240	238	198	233	228

## VISITORS CALLING FOR INFORMATION PRIOR TO THEIR VISIT

<u>Called</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Yes	37.5%	38.2%	39.2%	37.5%	35.7%
No	62.5	61.8	60.8	62.5	64.3
Number of observations	600	600	600	600	600

## ADVANCE PLANNING BY VISITORS

<u>Number of Months</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
One month or less	45.1%	42.9%	43.7%	46.2%	45.1%
1 to 2 months	13.1	14.5	16.7	15.3	14.9
2 to 3 months	7.6	11.4	8.7	8.7	9.2
3 to 4 months	7.2	5.4	5.0	7.0	5.3
4 to 5 months	4.3	3.9	3.5	3.1	2.6
5 to 6 months	9.1	9.2	10.3	7.6	9.3
7 or more	13.6	12.7	12.1	12.1	15.6
Number of observations	900	900	900	900	900

Every year, the highest percentage of visitors spend one month or less planning their trip to Virginia Beach.

## VISITORS MAKING RESERVATIONS PRIOR TO THE TRIP

<u>Reservations</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Yes	87.3%	87.4%	88.2%	88.0%	89.8%
No	12.7	12.6	11.8	12.0	10.2
Number of observations	826	847	841	842	862

More than eighty percent of visitors make advance reservations prior to their visit to Virginia Beach.

## DISTRIBUTION OF REPEAT AND FIRST TIME VISITORS

<u>Type of Visitor</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
First time	22.4%	24.7%	19.1%	20.7%	21.3%
Repeat	77.6	75.3	80.9	79.3	78.7
Number of observations	900	900	900	900	900

## **DISTRIBUTION OF VISITORS GETTING INFORMATION FROM THE INTERNET**

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Yes	75.3%	80.0%	78.3%	76.8%	83.7%
No	24.7	20.0	21.7	23.2	16.3
Number of observations	600	600	600	600	600

## DISTRIBUTION OF VISITORS PURCHASING SOME TRAVEL SERVICE ON THE INTERNET

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
Yes	34.5%	39.3%	39.5%	46.5%	52.8%
No	65.5	60.7	60.5	53.5	47.2
Number of observations	600	600	600	600	600

**APPENDIX I**  
**SURVEY DESIGN**

## **OBJECTIVES**

The major objective of this study is to produce a profile of visitors to Virginia Beach during the summer of 2008. Specifically, this profile demonstrates the patterns of demographic, spending, information processing, market and other characteristics of tourists who visit Virginia Beach. An additional objective is to compare these findings with those from the 2004, 2005, 2006 and 2007 overnight visitor Virginia Beach Surveys.

### ***The 2008 Virginia Beach Overnight Visitor Survey***

To meet the above objectives, 900 interviews using the attached survey were conducted in the boardwalk/beach area from 3rd to 39th street along Atlantic Avenue in three separate intervals spread across the summer. Interviews were conducted from June 6 to June 27; July 8 to July 25; and August 1 to August 21.

Continental Research, Inc conducted interviews for the 2008 overnight visitor survey. A skip interval procedure based on a random number generator was used to determine which visitors would be surveyed.

## **Comparisons with the 2004, 2005, 2006, 2007 and 2008 Overnight Visitor Surveys**

Data that formed the core of the 2008 visitor profile was compared with the 2004, 2005, 2006 and 2007 overnight visitor surveys. Comparisons were undertaken only when strict comparability between data definitions could be assured. The purpose of these comparisons is to:

- Examine trends in year-to-year tourist data; and
- Extend the knowledge base from which long-term trends in market sensitive tourist data can be investigated.

### ***A Word of Caution***

Survey results are subject to error and are therefore only an approximation of actual visitation patterns. This problem becomes especially acute when extrapolating from small cell sizes. For example, visitation from some states and DMAs was extremely small among those interviewed. It is certainly correct to summarize that such states and DMAs do not account for a large portion of visitors. However, exact rankings with such limited observations are tenuous at best.

## **APPENDIX II**

# **COUNTY BREAKDOWN OF THE TOP FOUR DMA MARKETS**

**Counties and Visitors from the Northern VA, MD,  
WV, PA and the District of Columbia DMA**

*Summer 2008*

<b>State/County</b>	<b>Visitors</b>	<b>Portion of DMA Visitors (%)</b>
<b>A. VIRGINIA</b>	<b>75</b>	<b>62.5%</b>
1. Arlington	8	6.7
2. Culpepper	2	1.7
3. Fairfax	24	20.0
4. Fauquire	3	2.5
5. Frederick	1	0.8
6. King George	3	2.5
7. Loudoun	3	2.5
8. Page	3	2.5
9. Prince William	9	7.5
10. Shenandoah	2	1.7
11. Spotsylvania	12	10.0
12. Stafford	4	3.3
13. Warren	1	0.8
<b>B. MARYLAND</b>	<b>28</b>	<b>23.3%</b>
1. Allegany	2	1.7
2. Charles	1	0.8
3. Frederick	3	2.5
4. Montgomery	10	8.3
5. Prince George	8	6.7
6. St. Marys	1	0.8
7. Washington	3	2.5
<b>C. WEST VIRGINIA</b>	<b>8</b>	<b>6.7%</b>
1. Berkley	5	4.2
2. Jefferson	1	0.8
3. Morgan	2	1.7
<b>D. PENNSYLVANIA</b>	<b>3</b>	<b>2.5%</b>
1. Franklin	3	2.5
<b>E. DISTRICT OF COLUMBIA</b>	<b>6</b>	<b>5.0%</b>
<b>TOTAL</b>	<b>120</b>	<b>100.0%</b>

**Counties and Visitors from the Richmond/Petersburg DMA**  
*Summer 2007*

State/County	Visitors	Portion of DMA Visitors (%)
<b>VIRGINIA</b>	<b>96</b>	<b>100.0%</b>
1. Amelia	1	1.0
2. Augusta	9	9.4
3. Brunswick	1	1.0
4. Buckingham	2	2.1
5. Caroline	2	2.1
6. Chesterfield	25	26.0
7. Dinwiddie	5	5.2
8. Essex	1	1.0
9. Fluvanna	4	4.2
10. Goochland	2	2.1
11. Greensville	1	2.1
12. Hanover	8	8.3
13. Henrico	11	11.5
14. King William	1	1.0
15. Louisa	5	5.2
16. Madison	1	1.0
17. Nelson	3	3.1
18. New Kent	1	1.0
19. Northumberland	1	1.0
20. Orange	3	3.1
21. Powhatan	3	3.1
22. Prince George	1	1.0
23. Richmond- Ind	5	5.2

**Counties and Visitors from Suburban NY, NJ, CT, PA  
and New York City DMA**

*Summer 2008*

<b>State/County</b>	<b>Visitors</b>	<b>Portion of DMA Visitors (%)</b>
<b>A. NEW YORK</b>	<b>33</b>	<b>63.5%</b>
1. Bronx	5	9.6
2. Dutchess	3	5.8
3. Kings	5	9.6
4. Nassau	2	3.9
5. New York	1	1.9
6. Orange	2	3.9
7. Putnam	1	1.9
8. Queens	2	3.9
9. Richmond	3	5.8
10. Rockland	2	3.9
11. Suffolk	5	9.6
12. Westchester	2	3.9
<b>B. NEW JERSEY</b>	<b>18</b>	<b>34.6%</b>
1. Bergen	3	5.8
2. Essex	1	1.9
3. Middlesex	5	9.6
4. Monmouth	3	5.8
5. Morris	2	3.9
6. Passaic	1	1.9
7. Sussex	1	1.9
8. Union	1	1.9
9. Warren	1	1.9
<b>C. CONNECTICUT</b>	<b>1</b>	<b>1.9%</b>
1. Fairfield	1	1.9
<b>TOTAL</b>	<b>52</b>	<b>100.0%</b>

## Counties and Visitors from the Roanoke-Lynchburg DMA

Summer 2008

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State/County	Visitors	Portion of DMA Visitors (%)
<b>VIRGINIA</b>	<b>48</b>	<b>100.0%</b>
1. Alleghany	2	4.2
2. Amherst	1	2.1
3. Appomattox	1	2.1
4. Bath	1	2.1
5. Bedford	8	16.7
6. Botetourt	2	4.2
7. Campbell	8	16.7
8. Carroll	1	2.1
9. Charlotte	1	2.1
10. Floyd	1	2.1
11. Franklin	1	2.1
12. Giles	1	2.1
13. Halifax	2	4.2
14. Henry	1	2.1
15. Montgomery	1	2.1
16. Pittsylvania	2	4.2
17. Pulaski	1	2.1
18. Roanoke	6	12.5
19. Rockbridge	7	14.6

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**APPENDIX III**  
**VIRGINIA BEACH TOURISM SURVEY,**  
**2008**

**2008 Virginia Beach Overnight Visitor Survey**  
**Continental Research Associates, Inc.**

**KEY:**

S= On the **800** Sand Surveys (100=May, 600=Jun/Jul/Aug, 100=Sept)

B= On the **500** Boardwalk Surveys (100=May, 300=Jun/Jul/Aug, 100=Sept) and the **300**  
Alternate Site Surveys in

Jun/Jul/Aug

A= On the **500** Atlantic Avenue Surveys (100=May, 300=Jun/Jul/Aug, 100=Sept)

**WE NOTE REFUSALS ON THE BOTTOM OF THE BLUE MINI-SURVEY**

**Two Screening Questions:**

a) Do you live in Virginia Beach?

SBA            Visitor-Continue      Lives in VB-(Switch to Non-Overnight Visitor Blue  
**Survey)**

b) During this visit to Virginia Beach, are you staying overnight in Virginia Beach for at least one night?

SBA            Yes-Continue      No-(Switch to Non-Overnight Visitor Blue Survey)

---

1. How many nights are you staying in Virginia Beach on this trip? \_\_\_\_\_ nights  
SBA

2. How long ago did you start planning this trip? **(Will be converted to weeks in coding.)**  
SB  
\_\_\_\_\_ months    \_\_\_\_\_ weeks    \_\_\_\_\_ days

3. Is this trip to Virginia Beach more of: **(Read Choices)**  
SBA

- 1- A weekend trip,
- 2- A primary vacation,
- 3- A secondary vacation,
- 4- A visit to see friends or family,

5- For a conference or convention, or

6- For business?

4. While you are here in Virginia Beach, will you go to:

SB

**(READ EACH AND PAUSE FOR**

**RESPONSE)**

1-Yes 2- No The Virginia Aquarium and Marine Science Museum in VB

1-Yes 2- No The Old Coast Guard Station Museum in VB

1-Yes 2- No Ocean Breeze Water Park or Motorworld

1-Yes 2- No The Back Bay Wildlife Refuge, False Cape, or First Landing Seashore State Park

1-Yes 2- No The Association for Research and Enlightenment

1-Yes 2 - No Play regular golf, not mini

1-Yes 2- No Go to a shopping mall

1-Yes 2- No Busch Gardens in Williamsburg

1-Yes 2- No Colonial Williamsburg

1-Yes 2- No Water Country USA in Williamsburg

1-Yes 2- No Nauticus in Norfolk

1-Yes 2- No Go fishing

5. How many total times, including this trip, will you visit or have you visited Virginia Beach this summer from May through Sept.?

SB

\_\_\_\_\_ times

6. Is this the first time you have EVER visited Virginia Beach?

SBA

1-Yes 2-No (**Go to Q8a**)

7. (**If yes...**) What are the two main things that first attracted you to vacation in Virginia Beach? (**PROBE**)

S

1)

---

2)

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8a. Did anyone in your party use the Internet to get information about Virginia Beach?

S

1-Yes            2-No

8b. Before this trip, did you read any on-line reviews about Virginia Beach that were written by other travelers?

S

1-Yes            2-No

9. Have you seen or heard any advertising for Virginia Beach in the past six months?

SBA

1-Yes            2-No

10. Did you, or any member of your party, write or call for information on places to stay or things to do before coming to Virginia Beach?

S

1-Yes            2-No

11. Did you buy or book any part of this trip, a hotel, or car rental over the Internet?

S

1-Yes            2-No

12. Are you staying in: **(Read All Choices)**

SBA

- |  |  |
|--|--|
| 1- A hotel or motel,                   | 4- In friends or relatives homes, <b>(Go to Q15)</b>     |
| 2- In a cottage, <b>(Go to Q14)</b>    | 5- In a condo, timeshare, or apt., or <b>(Go to Q14)</b> |
| 3- At a campground, <b>(Go to Q14)</b> | Someplace else? _____ <b>(Go to Q14)</b>                 |

13. **(If Hotel/Motel)** Would you say the cost of your hotel or motel room was: **(Read Choices)**

S

1-Very reasonable      2-Reasonable      3-Expensive, or      4-Very expensive



20. As a place to vacation, what one thing do you like best about Virginia Beach? **(Probe)**  
SB

21. And, what one thing do you like least about Virginia Beach? **(Probe)**  
SB

22. In your opinion, is the resort and beach area of Virginia Beach Extremely, Quite, Slightly, or Not at all clean? (Fill in blank with each item below)

SBA

1-Ext 2-Qui 3-Sli 4-Not at all clean

1-E ..... 2-Q .... 3-S ..... 4-N ..... family-oriented

1-E 2-Q 3-S 4-N visually appealing

1-E 2-Q 3-S 4-N crowded

1-E..... 2-Q .... 3-S ..... 4-N ..... safe

1-E 2-Q 3-S 4-N exciting in terms of things to do

1-E 2-Q 3-S 4-N rowdy, in terms of people's behavior

23. In general, are you Extremely, Quite, Slightly, or Not at All comfortable being in the resort and beach area of Virginia Beach?

SBA

1-E 2-Q 3-S 4-N

24. On a scale of 1 to 5, with 1 being no parking difficulties and 5 being many parking difficulties, how would you rate the parking in the City of Virginia Beach?

S

1 2 3 4 5  
No difficulties Many difficulties

25. On a scale of 1 to 5, with 1 being no traffic difficulties and 5 being many traffic difficulties, how would you rate the traffic situation here in the Hampton Roads region?

SB



evening?

SBA

1-Yes                      2-No

33. How about on a Saturday after 8 p.m. this year?

SBA

1-Yes                      2-No

34. And, what is your age?    \_\_\_ \_\_\_ yrs. old

SBA

35. What is your home Zip Code?    \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ (extra "first" digit is for Canada)

SBA

36. **(If US...)** In what state is that? \_\_\_\_\_ (Don't Abbreviate)

SBA

37. **(If Canada...)** In what province is that?

SBA

81-Alb      83-Manit      85-New Fou      87-Ont      89-Que  
82-Br Col      84-New Br      86-Nova S      88-Pr Ed Is      90-Sask

38. Which LETTER describes your education? **(Hand Card)**

SBA

- 1-A) High school or less
- 2-B) One to three years of college
- 3-C) A 4-year college degree
- 4-D) A degree beyond a 4 yr. college degree

39. Lastly, which category includes your total yearly family income (in U.S. dollars)? **(Hand Card)**

SBA

- 1 - Under \$30,000
- 2 - \$30,000 to \$39,999
- 3 - \$40,000 to \$49,999
- 4 - \$50,000 to \$59,999
- 5 - \$60,000 to \$74,999
- 6 - \$75,000 to \$84,999
- 7 - \$85,000 to \$99,999
- 8 - \$100,000 to \$124,999
- 9 - \$125,000 or more
- 0 - Refused to say (after probe)

40. ETHNIC BACKGROUND:

SBA

- 1-White
- 2-African American
- 3-Asian
- 4-Hispanic

Other \_\_\_\_\_

41. GENDER: 1-Male 2-Female

SBA

DATE: \_\_\_\_\_, 2008 (The month will be keyed with ID at front of survey)

TIME: □□ : \_\_\_\_ \_\_\_\_ (Only key the hour)

- SITE:   1   Beach/Sand  
  2   Boardwalk  
  3   Atlantic Avenue  
  4   North End  
  5   Campground  
  6   Sandbridge

STREET INTERSECTING WHERE YOU ARE: \_\_\_\_\_

# **NOTES**