



VIRGINIA  BEACH  
L I V E   T H E   L I F E

## Virginia Beach 2017 Visitor Research



# Table of Contents

Introduction.....	3
Research Objectives.....	4
Methodology.....	5
Key Findings.....	6
Size & Structure of the U.S. Travel Market.....	10
Size & Structure of Virginia Beach's Domestic Travel Market.....	14
Overnight Trip Expenditures in Virginia Beach.....	22
Overnight Trip Characteristics.....	30
Demographic Profile of Overnight Visitors.....	65
Day Trip Expenditures.....	76
Day Trip Characteristics.....	82
Demographic Profile of Day Visitors.....	104
Appendix A: Key Terms Defined.....	115
Appendix B: How Visitation to Virginia Beach is Calculated.....	118

# 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 Virginia Beach'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 Virginia Beach.
  - ✓ A profile of Virginia Beach's performance within its overnight travel market.
  - ✓ Domestic visitor expenditures in Virginia Beach.
  - ✓ Profiles of Virginia Beach'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 Virginia Beach, the following sample was achieved in 2017:
  - 1,220 trips:
    - 925 overnight trips
    - 295 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, Virginia Beach welcomed 19 million visitors, an increase of 7% from 2016. Of these trips, 10.1 million or 53% were overnight trips. The rest were day trips.
- The overnight trips generated \$1.92 billion in visitor spending, up 6% from 2016.
- The vast majority of overnight trips to Virginia Beach were leisure trips -- visits to friends and relatives (41%) or “marketable” trips, i.e., discretionary leisure trips that can be influenced by marketing efforts (49%). The remainder of trips were divided between business trips (8%) and trips combining business and leisure purposes (2%)
- For overnight trips, the top state markets for Virginia Beach visitors were Virginia, North Carolina, and Pennsylvania. Among DMAs, the top three visitor sources were Washington DC, New York City, and Norfolk.

# Key Findings (Cont'd)

- Trips to Virginia Beach are planned further in advance than the average trip nationwide. Nearly 6 in 10 (58%) of Virginia Beach overnight trips in 2017 were planned 2 months or more before the trip. And 1 in 10 (10%) had no advance planning at all. This compares with national norms of 51% and 14%, respectively.
- Online travel agencies, accommodations, and advice from relatives or friends were the most common information sources people used to plan their Virginia Beach overnight trip in 2017. Accommodations online travel agencies were also the sources people most often used for booking travel.
- Of the overnight visitors, 75% had visited Virginia Beach at least once before. Half (50%) had visited in the past year.

# Key Findings (Cont'd)

- The average length of time people spent in Virginia Beach on an overnight trip was 2.8 nights., about the same as in 2016. The average travel party size was 3.1 persons, consisting of 2.3 adults and .8 children.
- About three-quarters (77%) of overnight Virginia Beach travelers arrived by personal car or truck, and 16% rented a car while there. Only 1 in 10 flew to Virginia Beach.
- The top activities and experiences that visitors engaged in on overnight trips to Virginia Beach included swimming and other beach/waterfront activities, shopping, fine dining, and visiting a landmark or historic site.
- Three-quarters (76%) of Virginia Beach visitors were very satisfied with their overall trip experience.

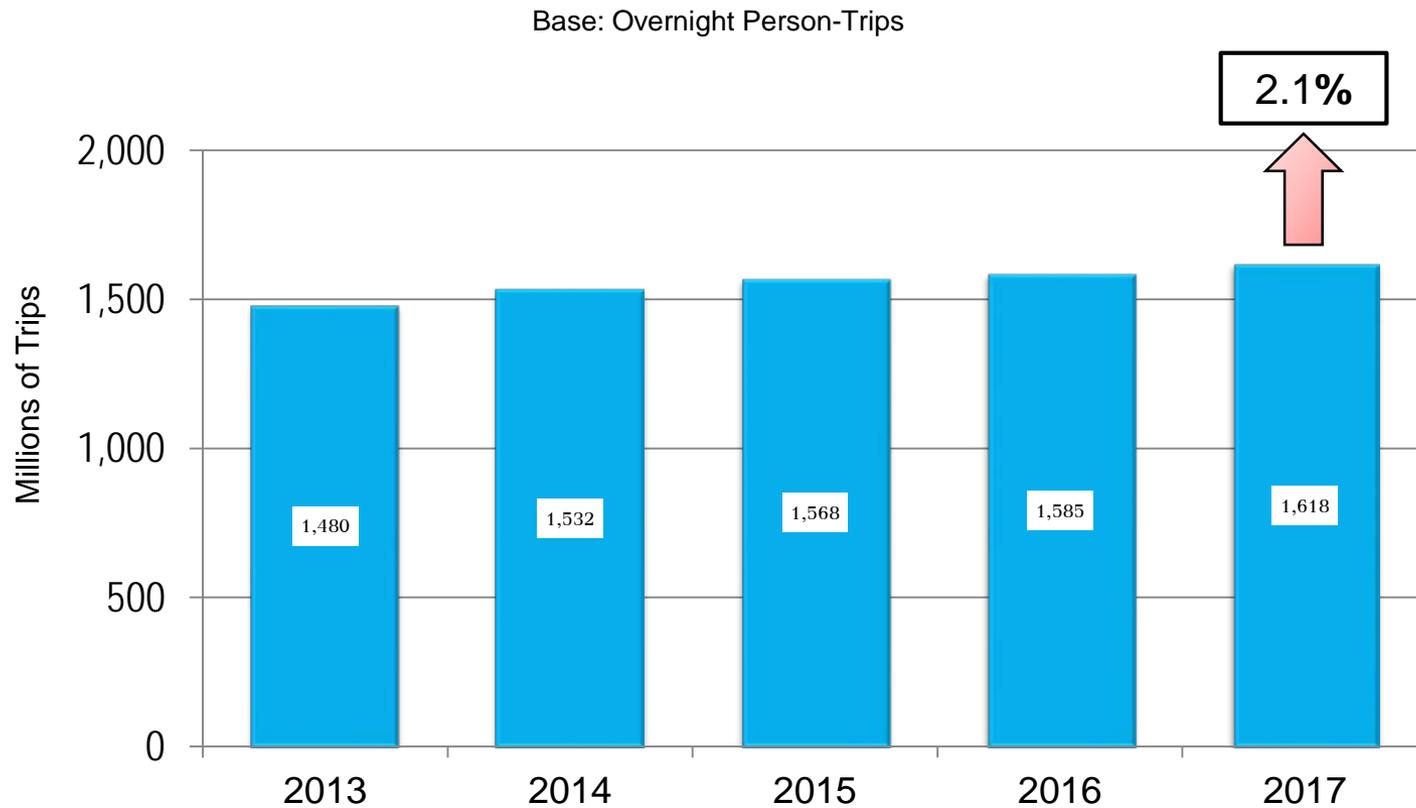


**Longwoods**  
INTERNATIONAL  
40 YEARS TOGETHER

## Size & Structure of the U.S. Travel Market

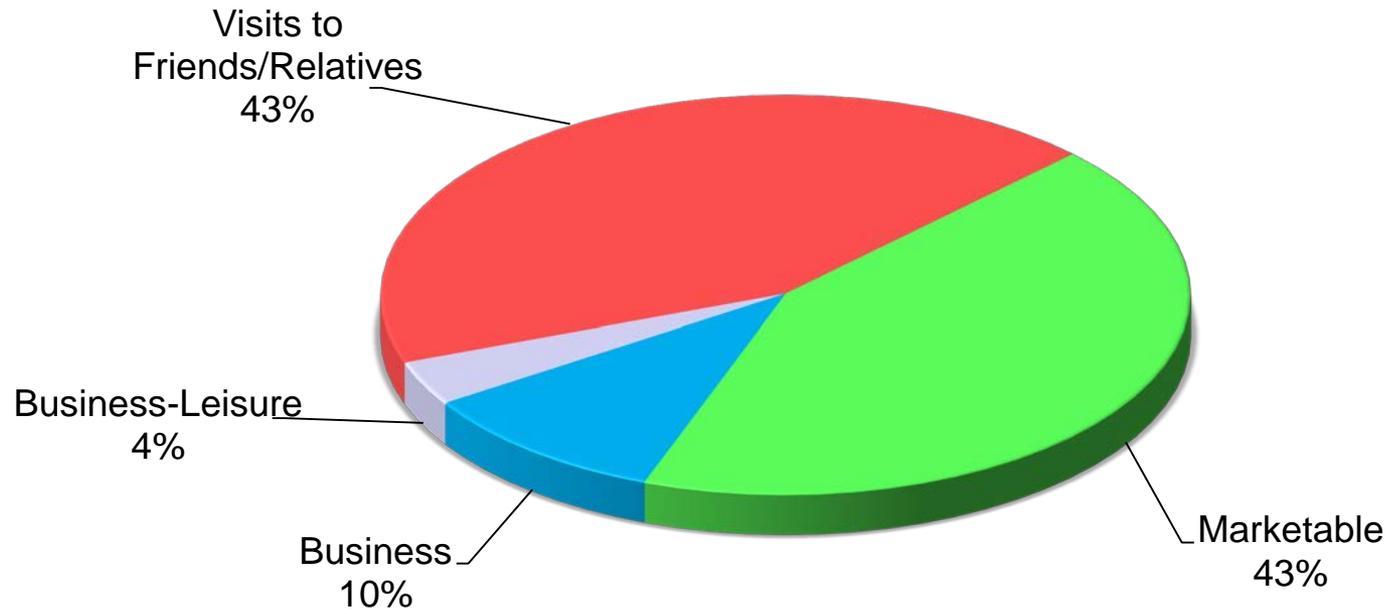


# Total Size of the U.S. Travel Market — 2013-2017



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

Base: Overnight Person-Trips



# U.S. Market Trends for Overnight Trips — 2017 vs. 2016





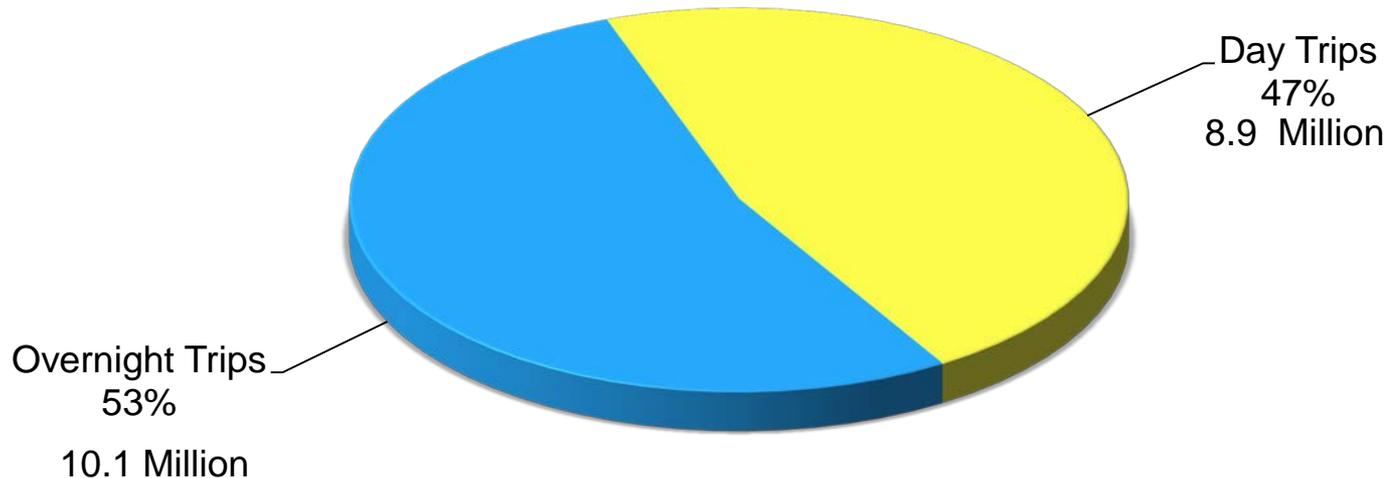
## Size & Structure of Virginia Beach's Domestic Travel Market



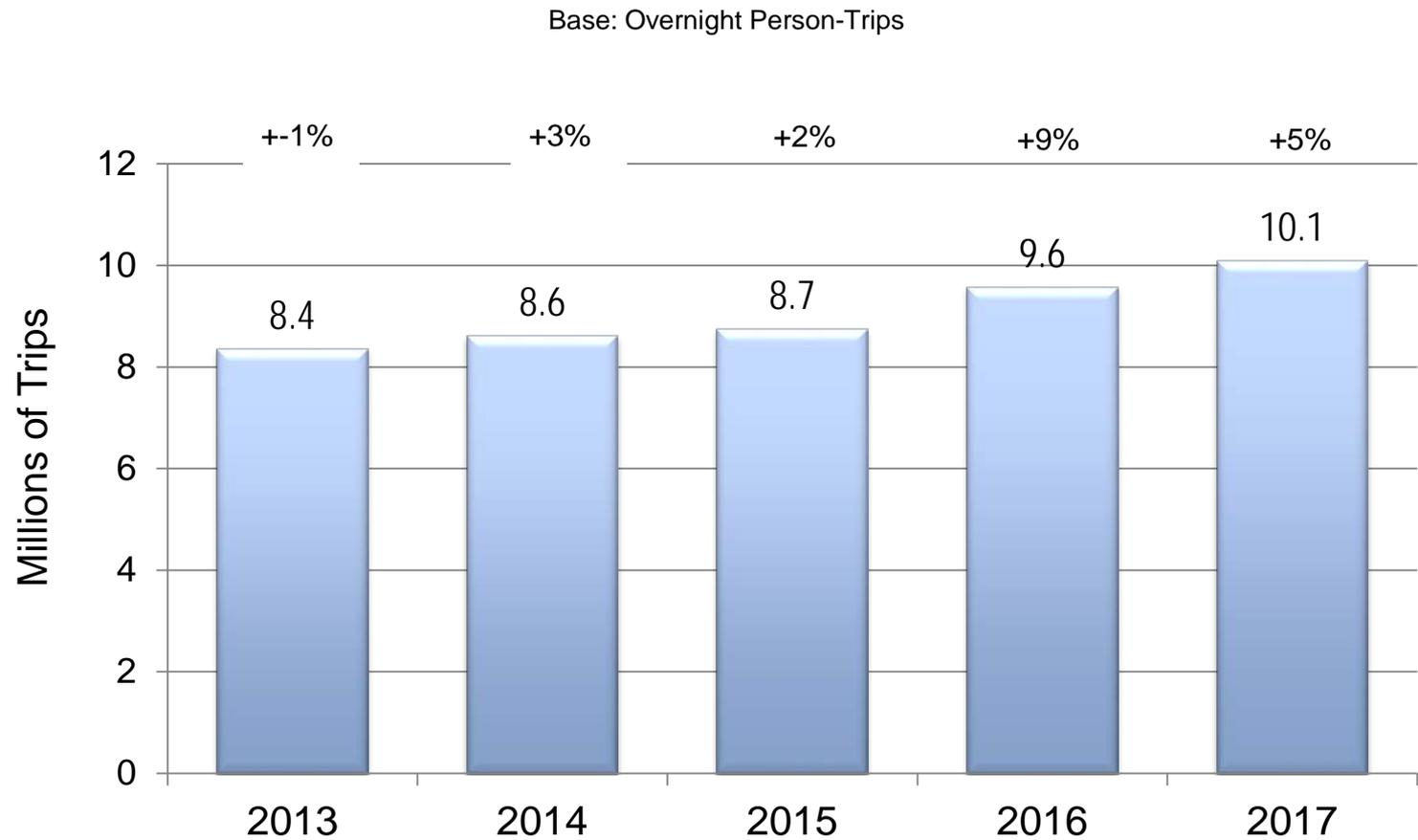
# Total Size of Virginia Beach's 2017 Domestic Travel Market

Total Person-Trips = 19.0 Million

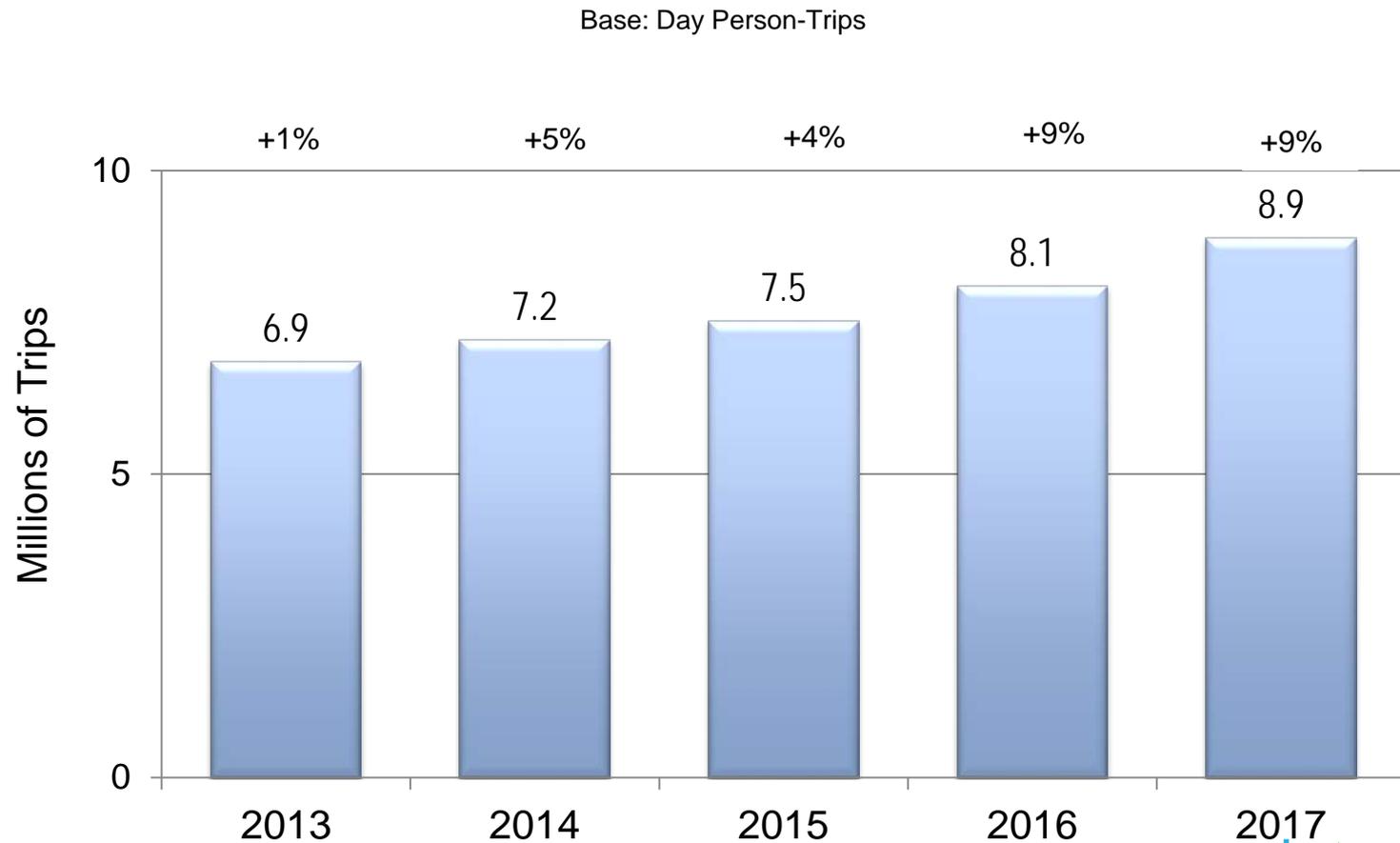
+7% vs. 2016



# Overnight Trips to Virginia Beach

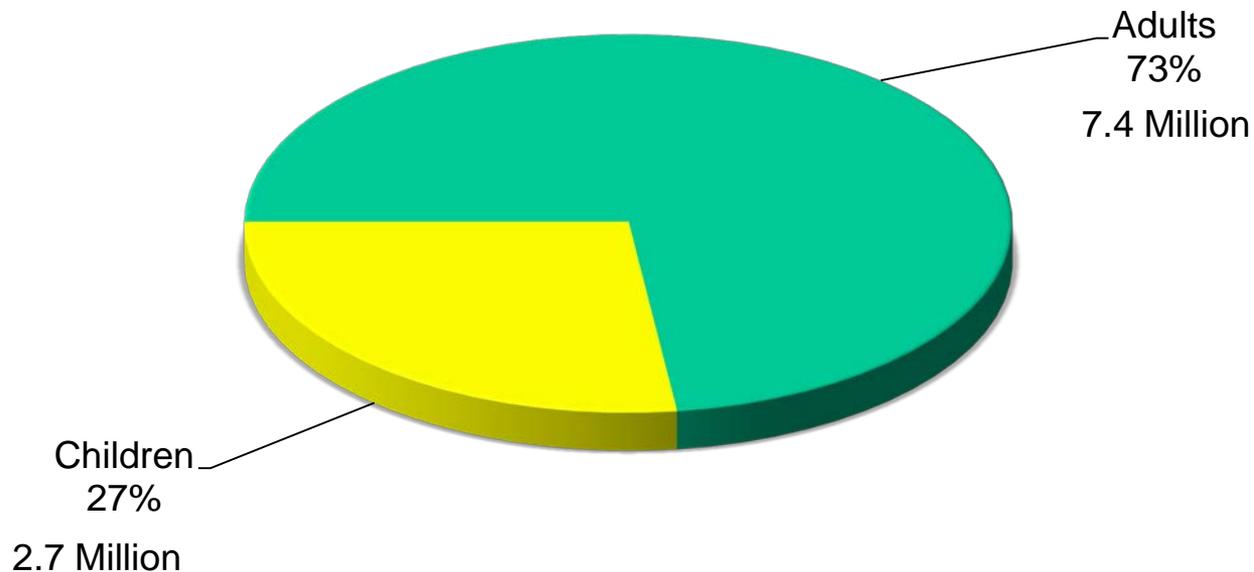


# Day Trips to Virginia Beach



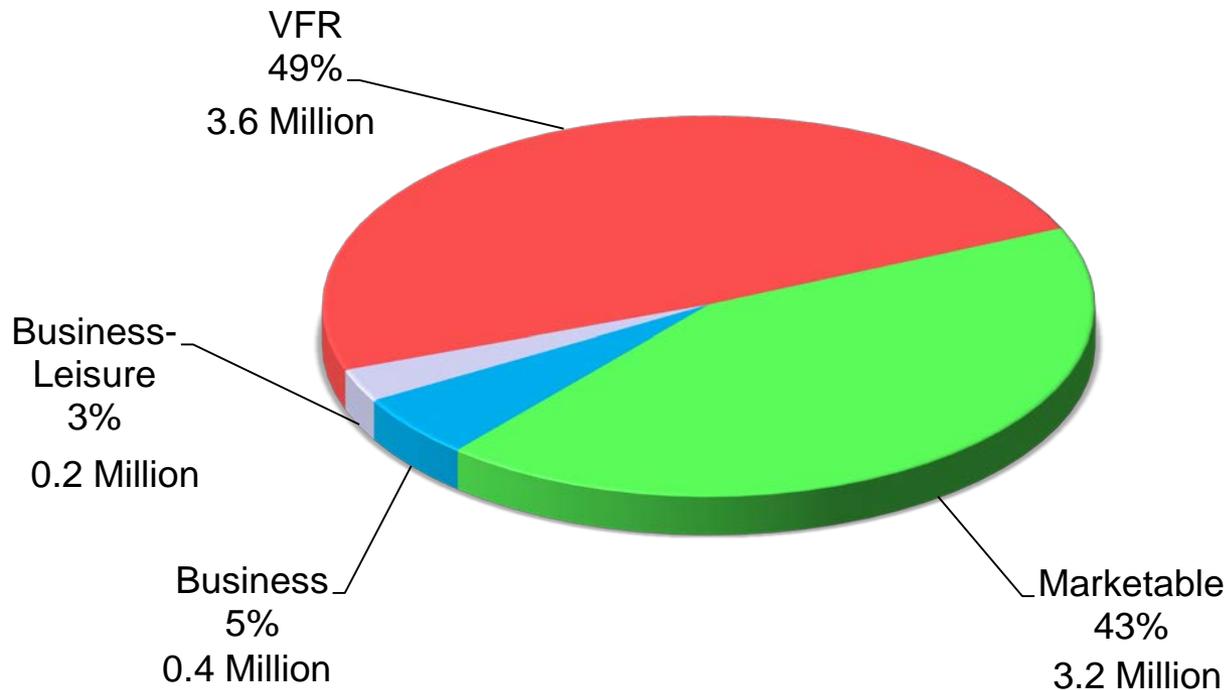
# Size of Virginia Beach's Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 10.1 Million



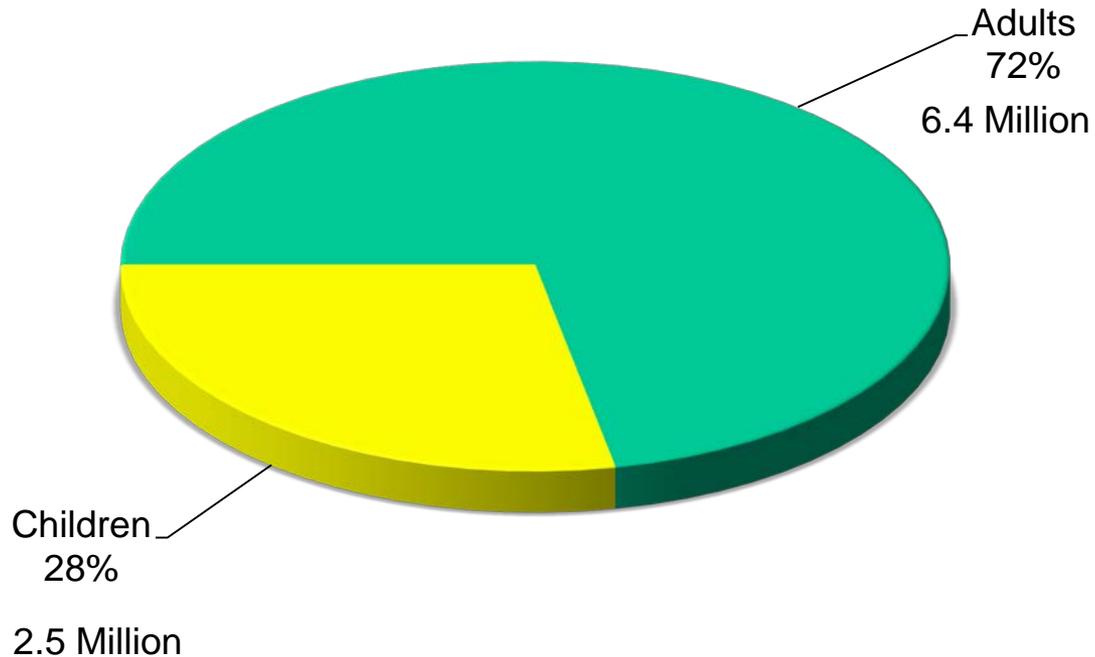
# Virginia Beach's Overnight Travel Market — by Trip Purpose

Adult Overnight Person-Trips = 7.4 Million



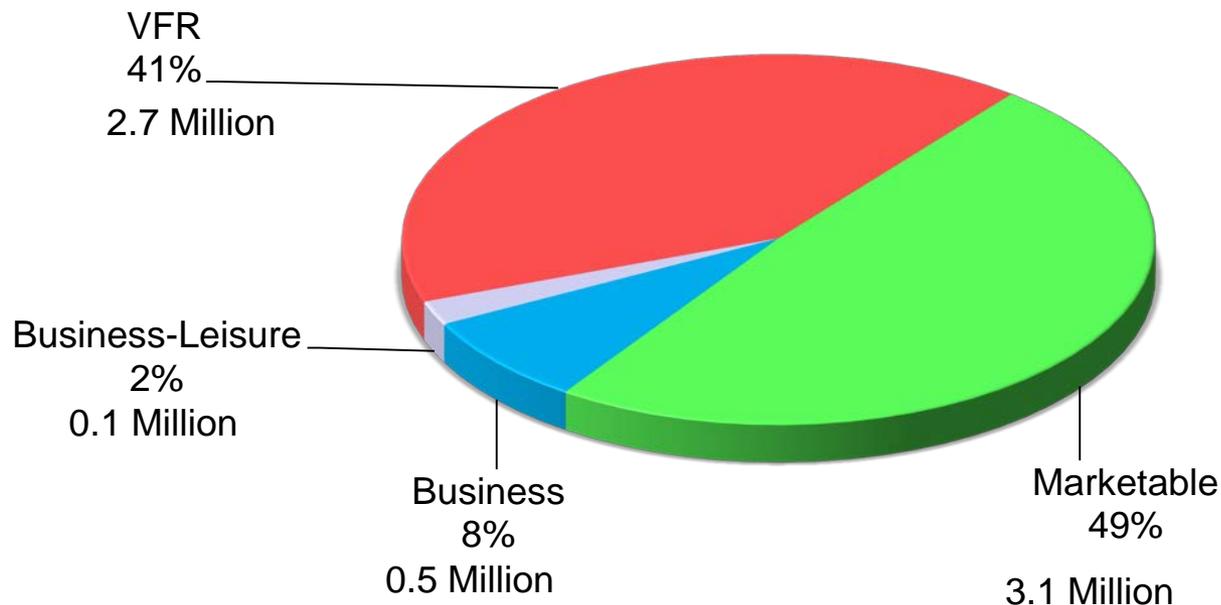
# Size of Virginia Beach's Day Travel Market — Adults vs. Children

Total Day Person-Trips = 8.9 Million



# Virginia Beach's Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 6.4 Million

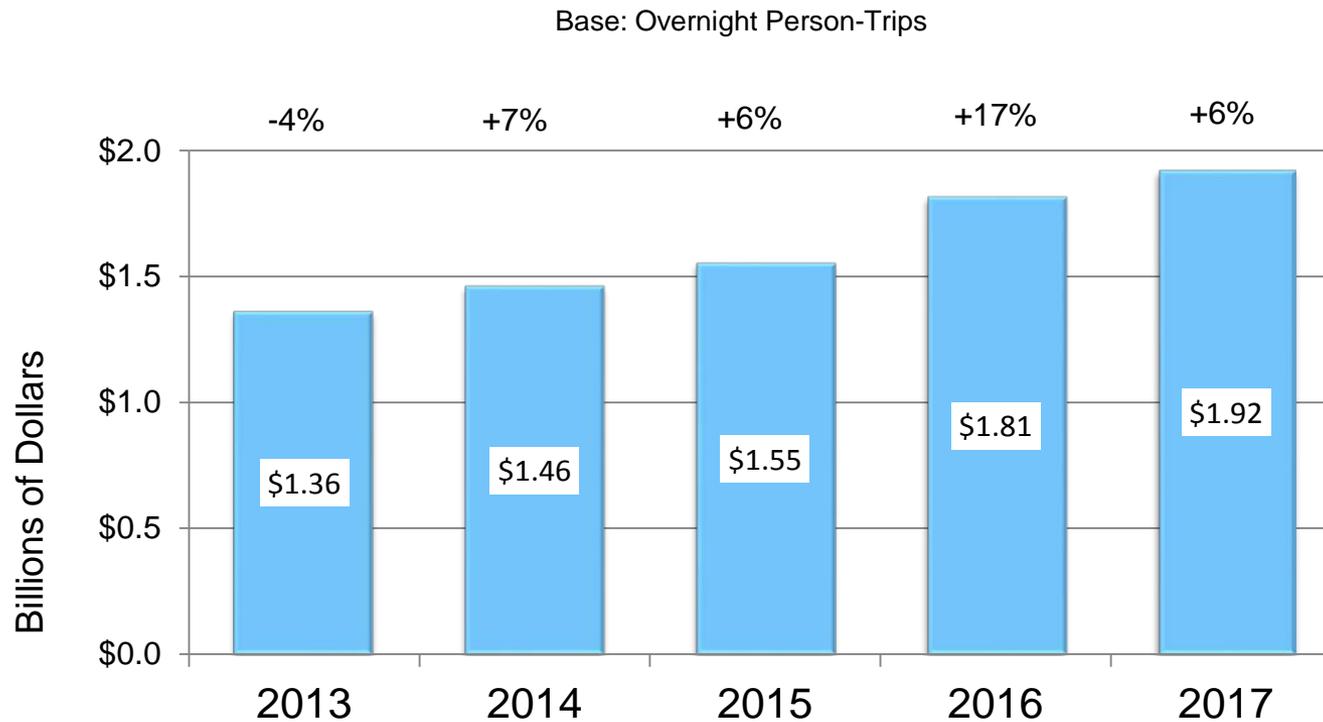




# Overnight Trip Expenditures in Virginia Beach



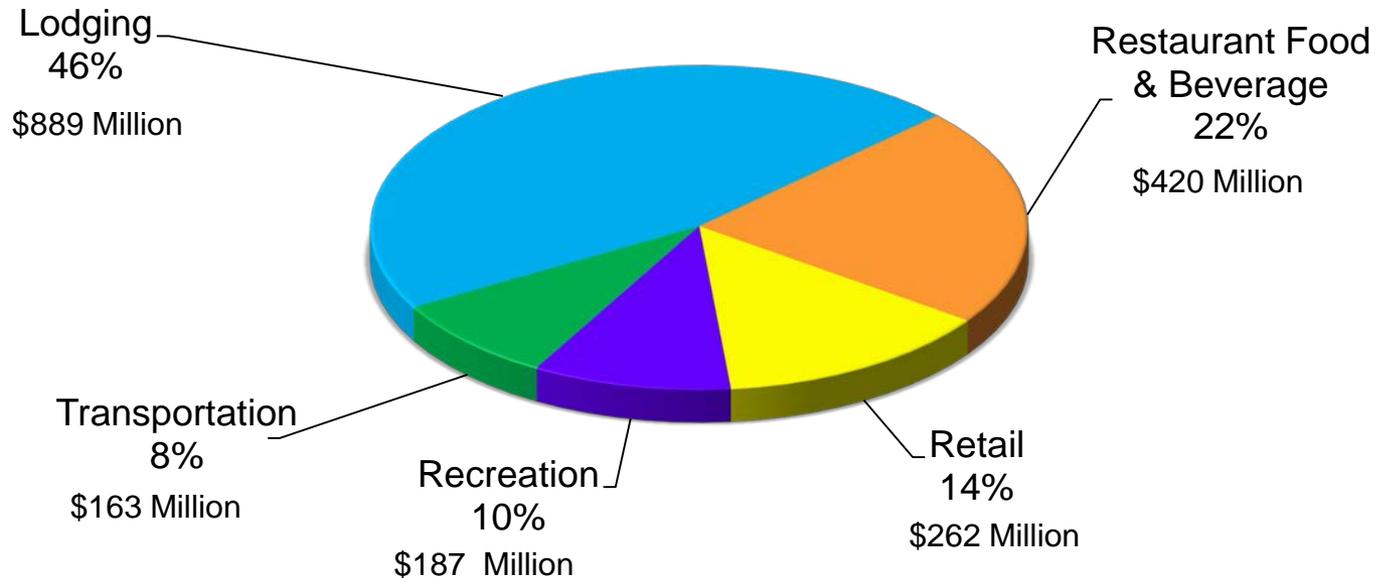
# Domestic Overnight Expenditures



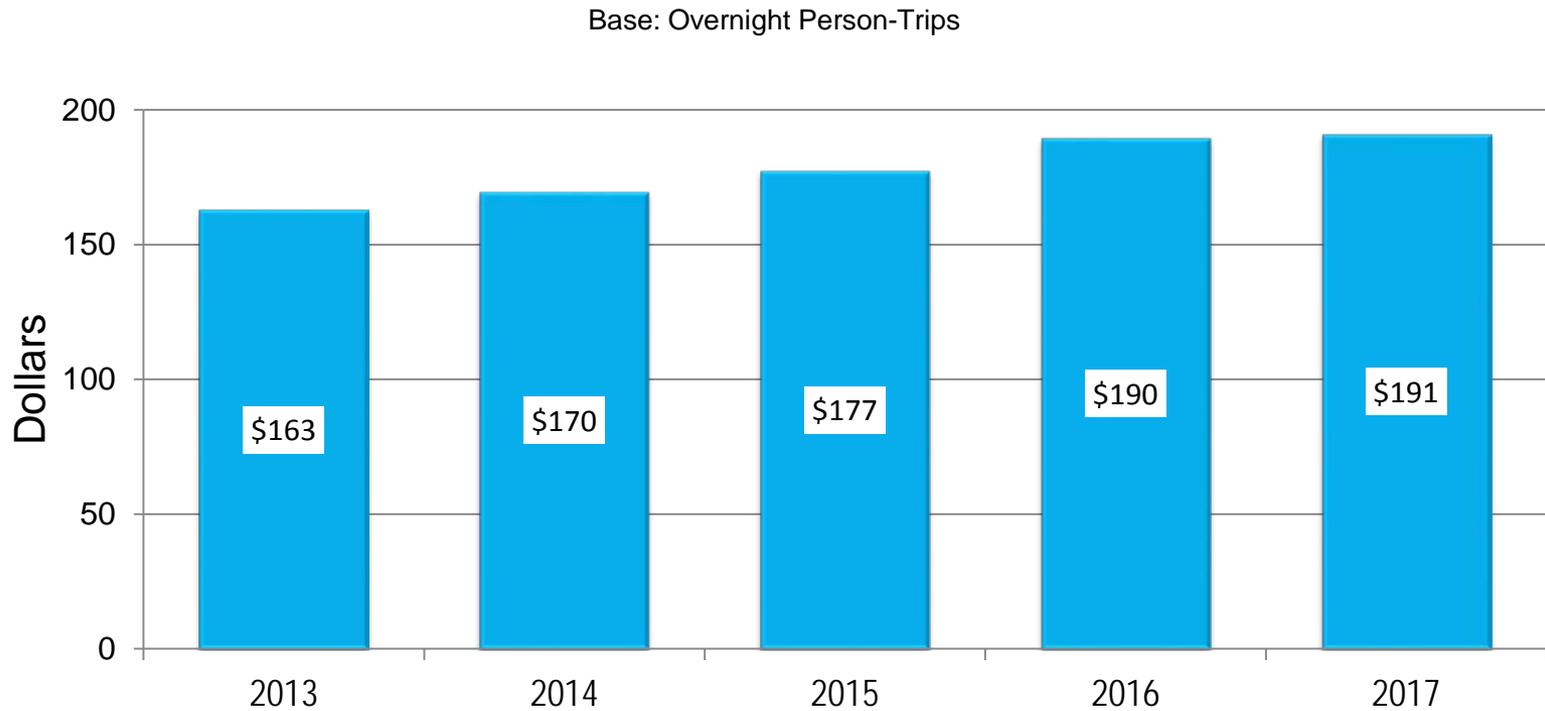
# Domestic Overnight Expenditures — by Sector

Total Spending = \$1.92 Billion

+6% vs. 2017

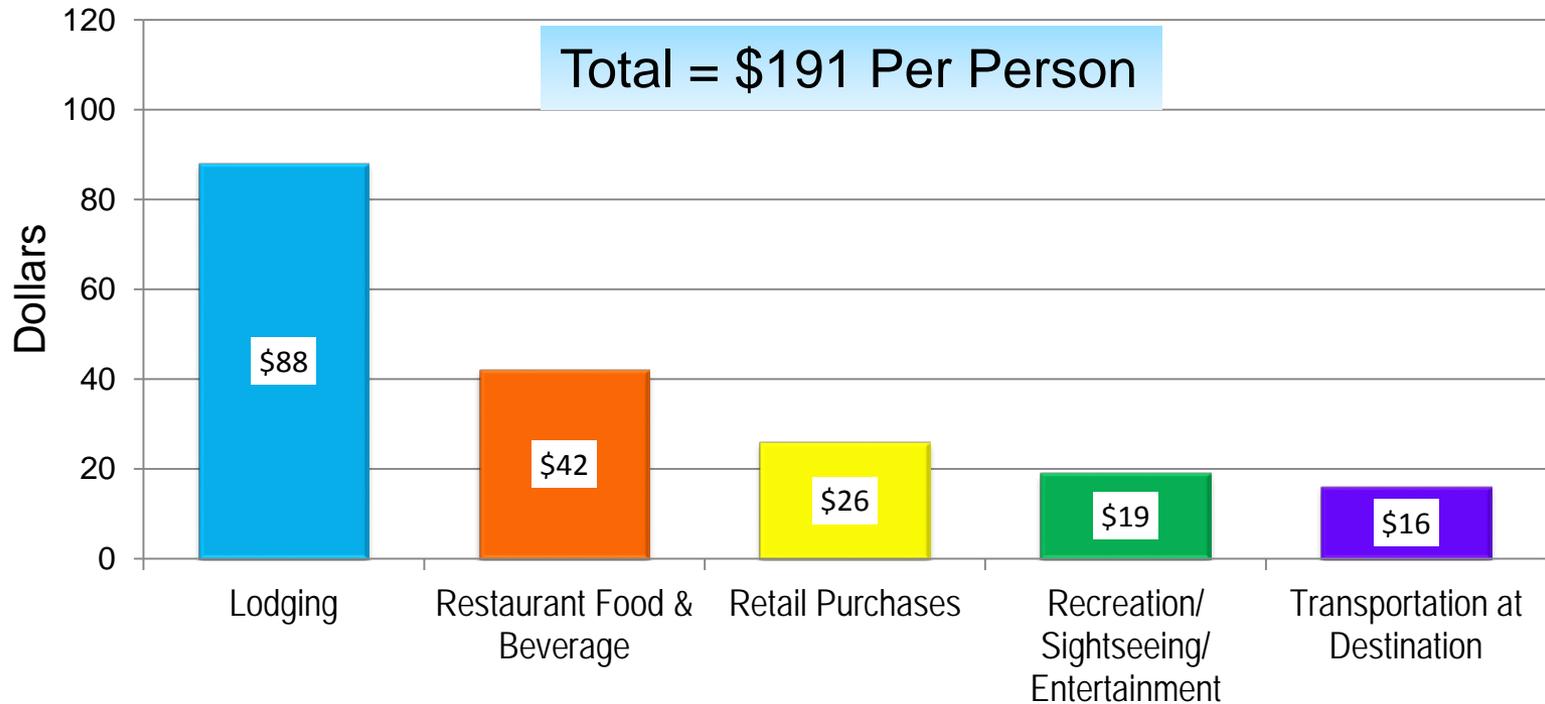


# Average Per Person Expenditures on Domestic Overnight Trips



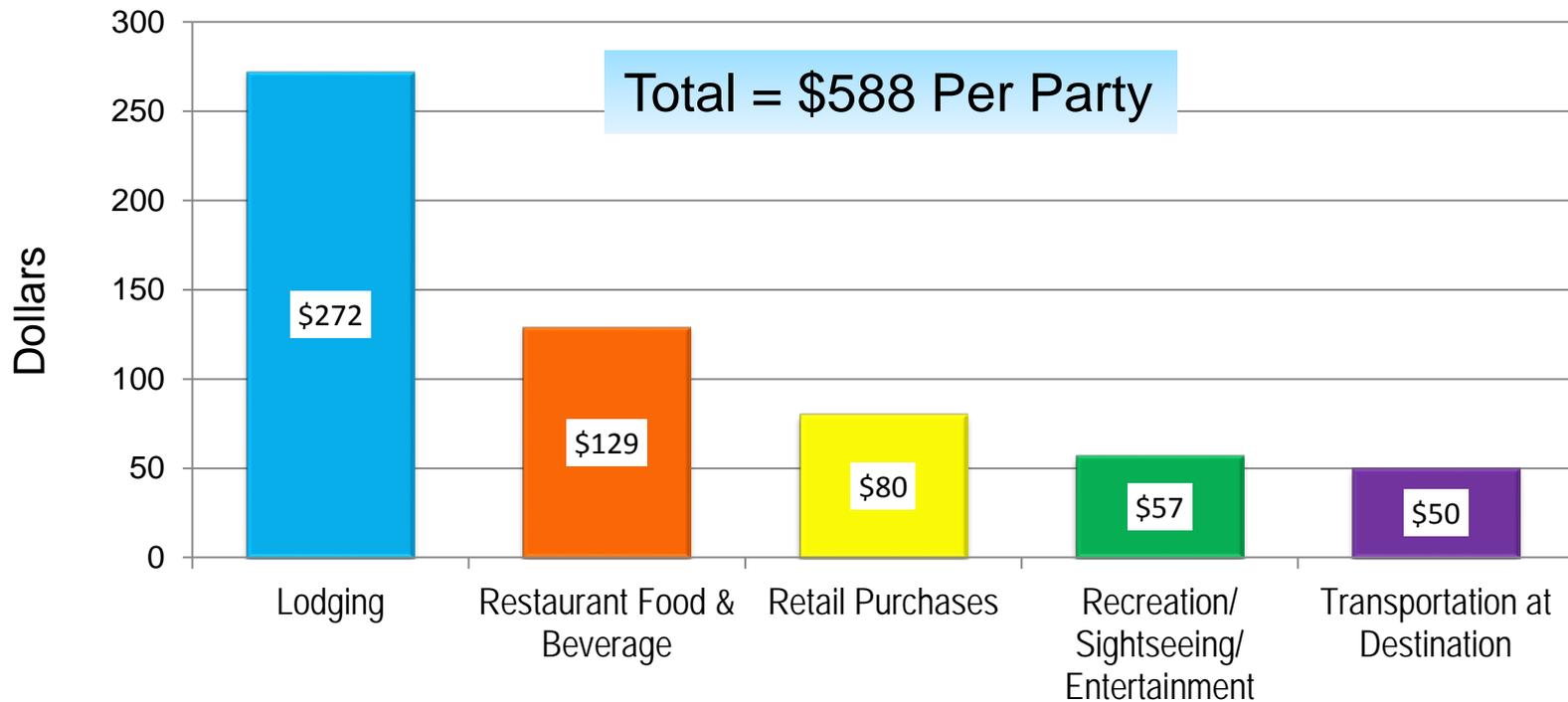
# Average Per Person Expenditures on Domestic Overnight Trips — By Sector

Base: Overnight Person-Trips



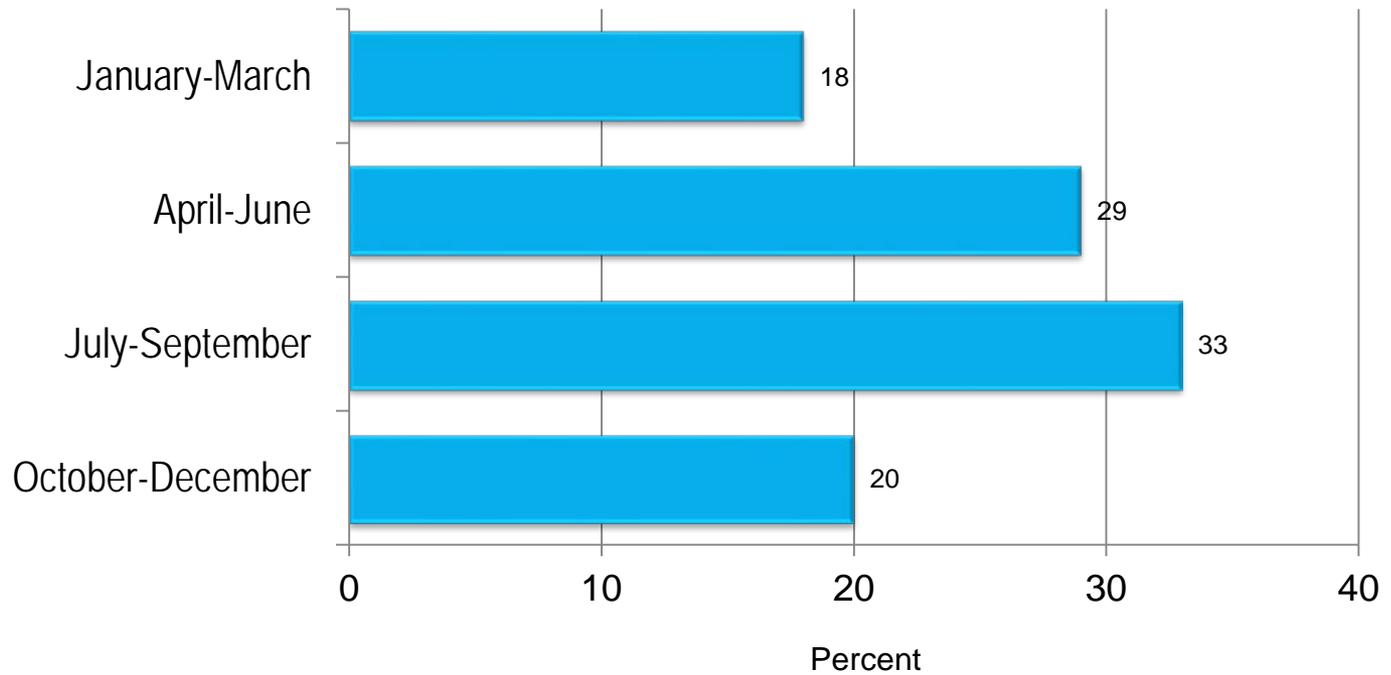
# Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Overnight Person-Trips



# Season of Trip

Base: Overnight Person-Trips



# Total Overnight Trips to Virginia Beach by Month

<u>Total Trips</u> <u>(millions)</u>	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
2012	0.5	0.5	0.5	0.7	0.6	1.2	1.2	1.1	0.6	0.6	0.5	0.5
2013	0.5	0.5	0.5	0.6	0.8	1.1	1.4	0.8	0.7	0.7	0.5	0.4
2014	0.5	0.4	0.7	0.6	0.8	1.0	1.4	1.0	0.5	0.7	0.5	0.4
2015	0.6	0.4	0.6	0.9	0.8	0.9	1.3	0.9	0.8	0.6	0.6	0.5
2016	0.5	0.5	0.8	0.8	0.9	0.9	1.3	1.0	0.8	0.8	0.7	0.5
2017	0.7	0.6	0.7	0.9	0.8	1.1	1.7	0.9	0.7	0.8	0.7	0.5

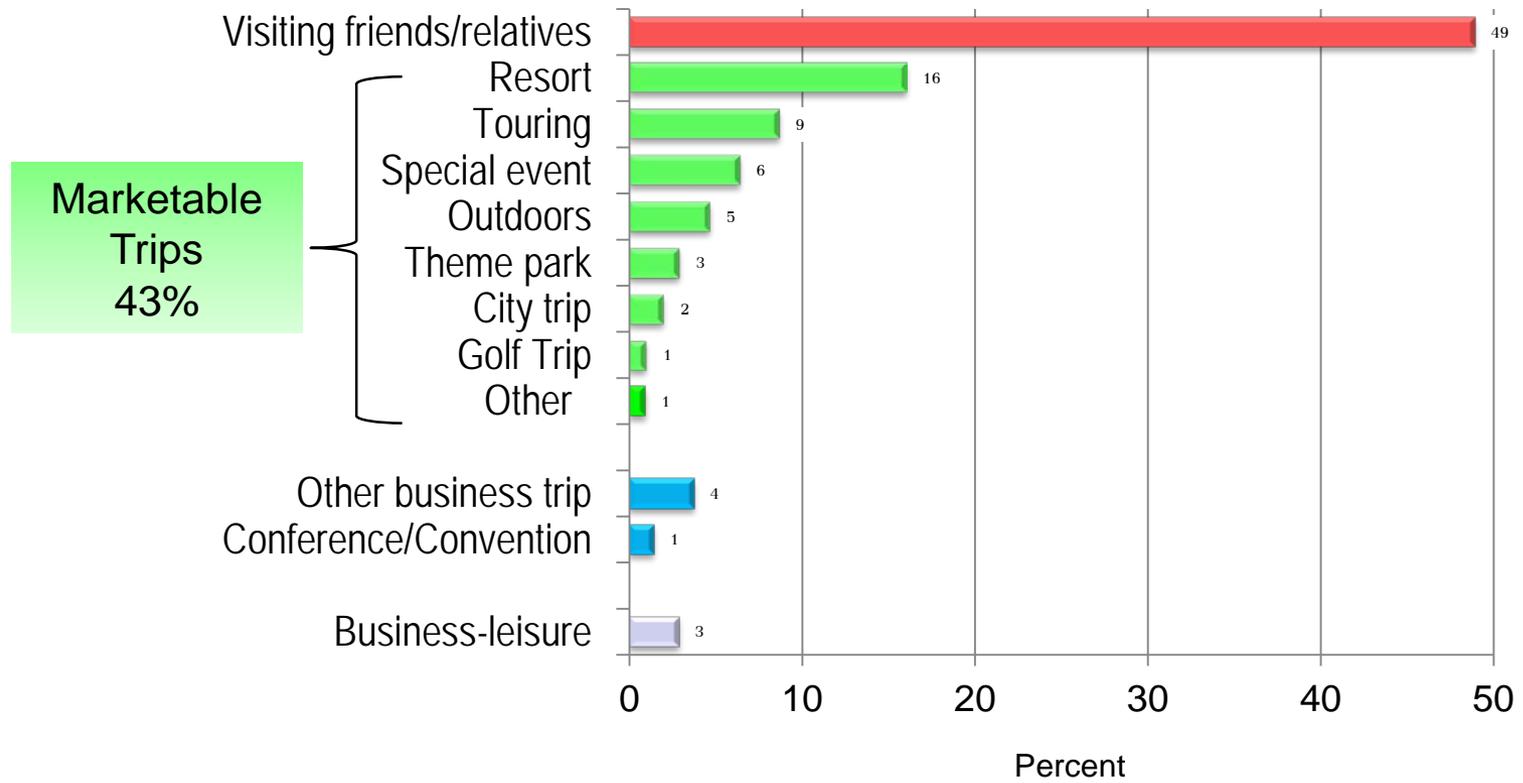


## Overnight Trip Characteristics

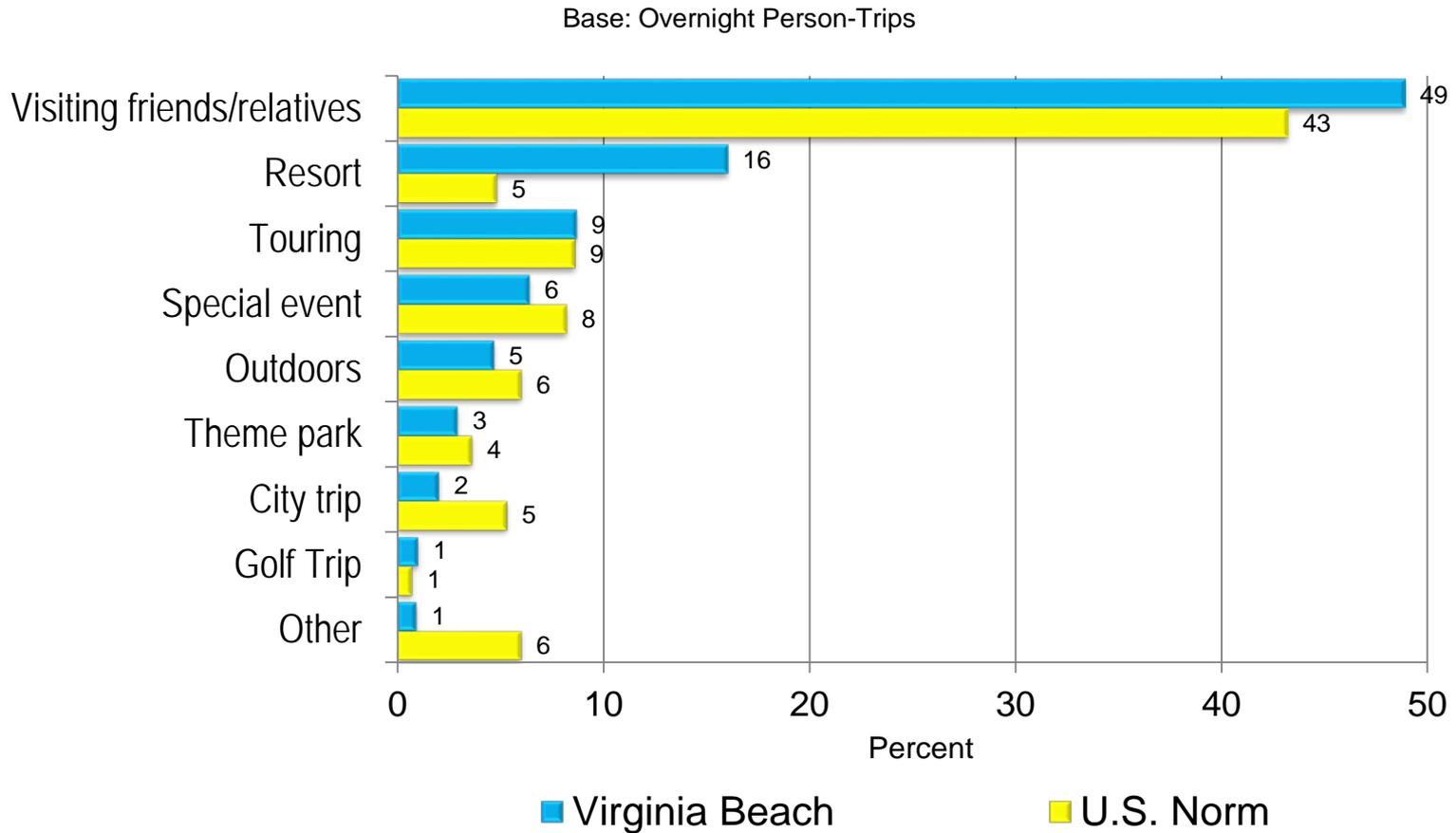


# Main Purpose of Trip

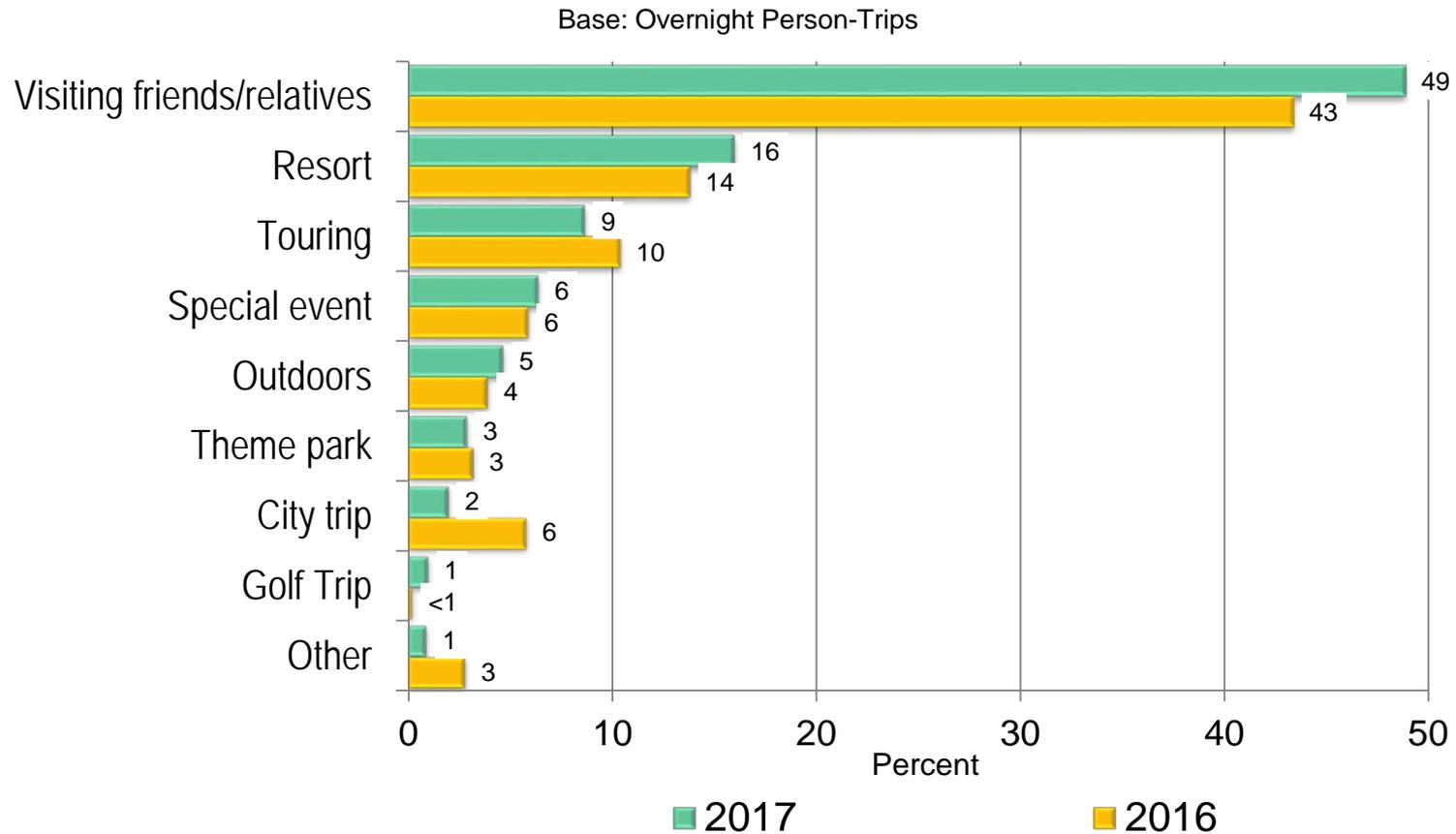
Base: Overnight Person-Trips



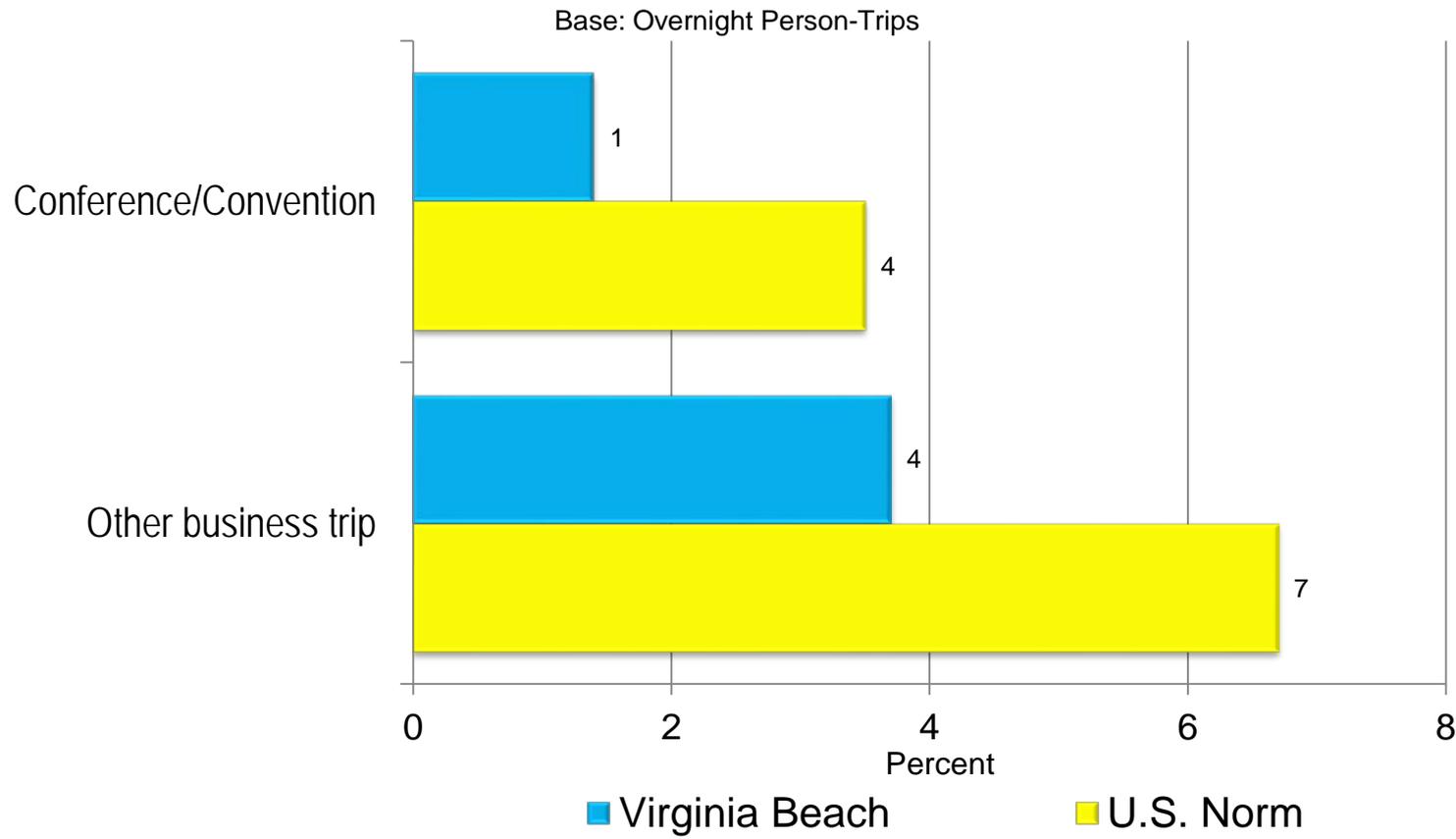
# Main Purpose of Leisure Trip



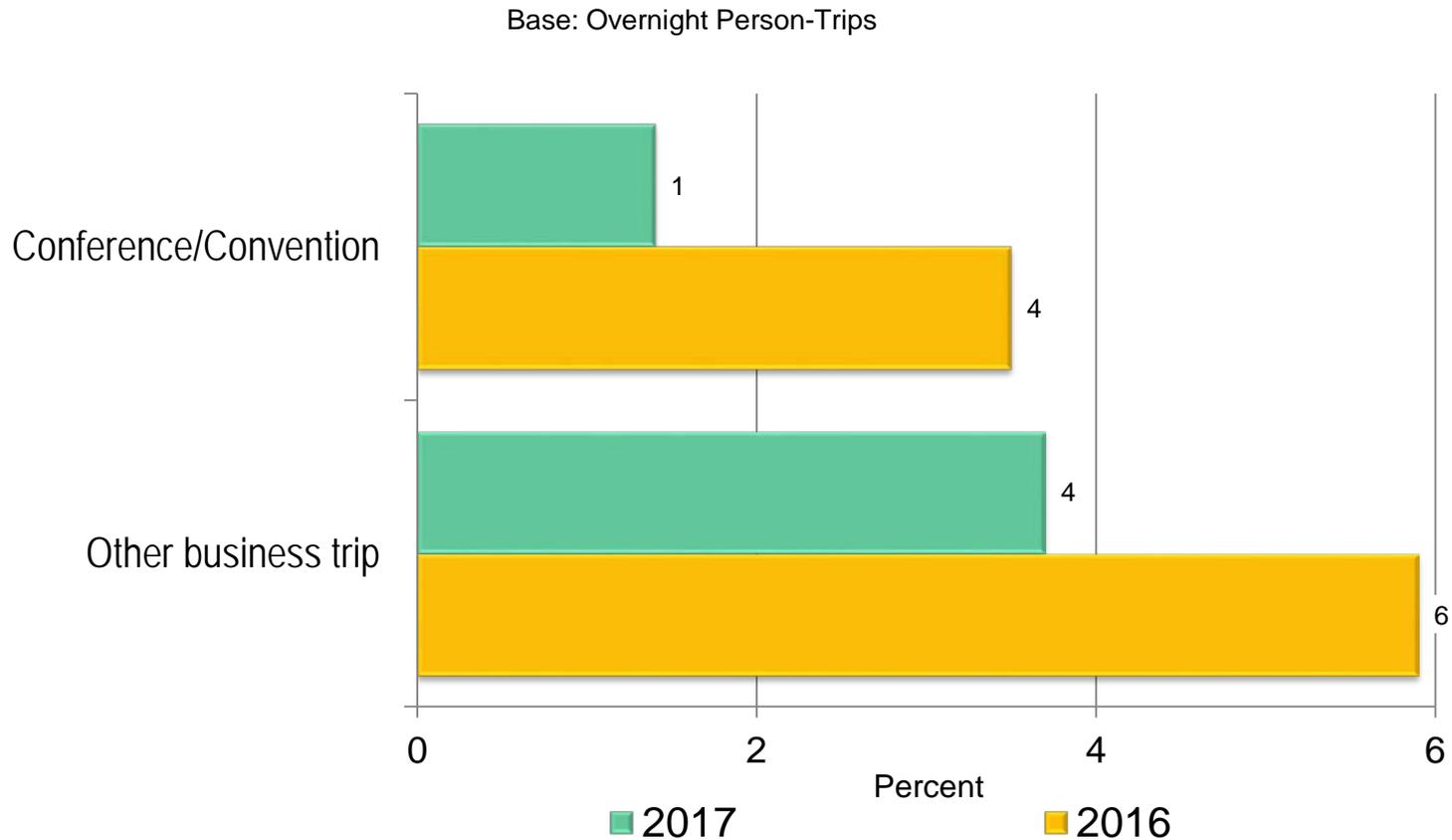
# Main Purpose of Overnight Leisure Trip — 2017 vs. 2016



# Main Purpose of Business Trip

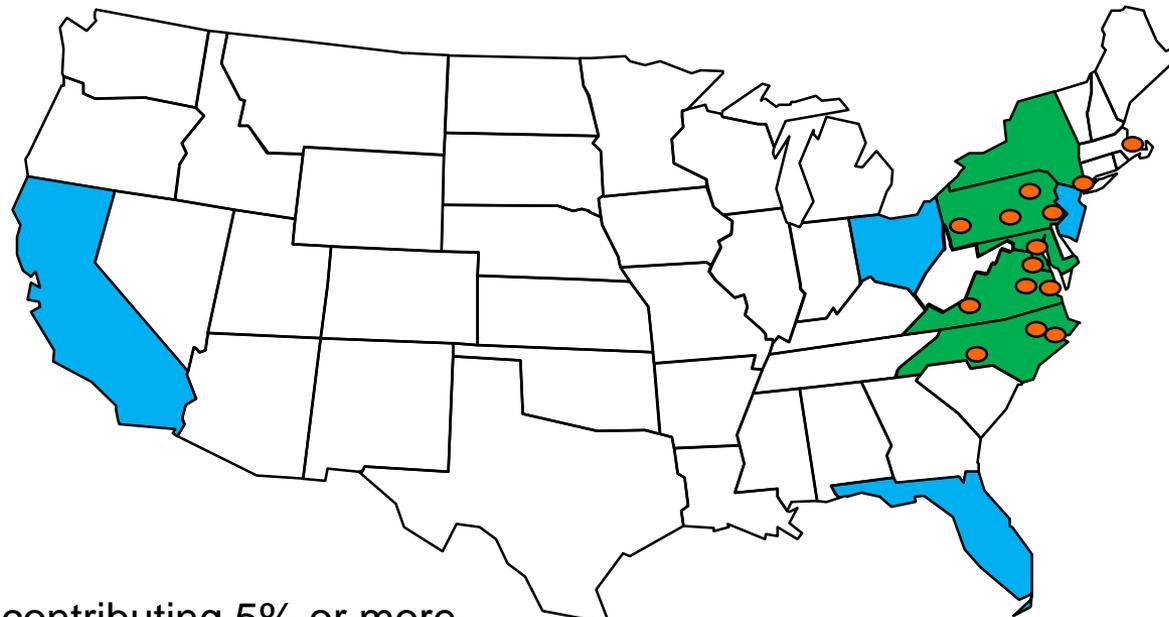


# Main Purpose of Overnight Business Trip — 2017 vs. 2016



# Sources of Business

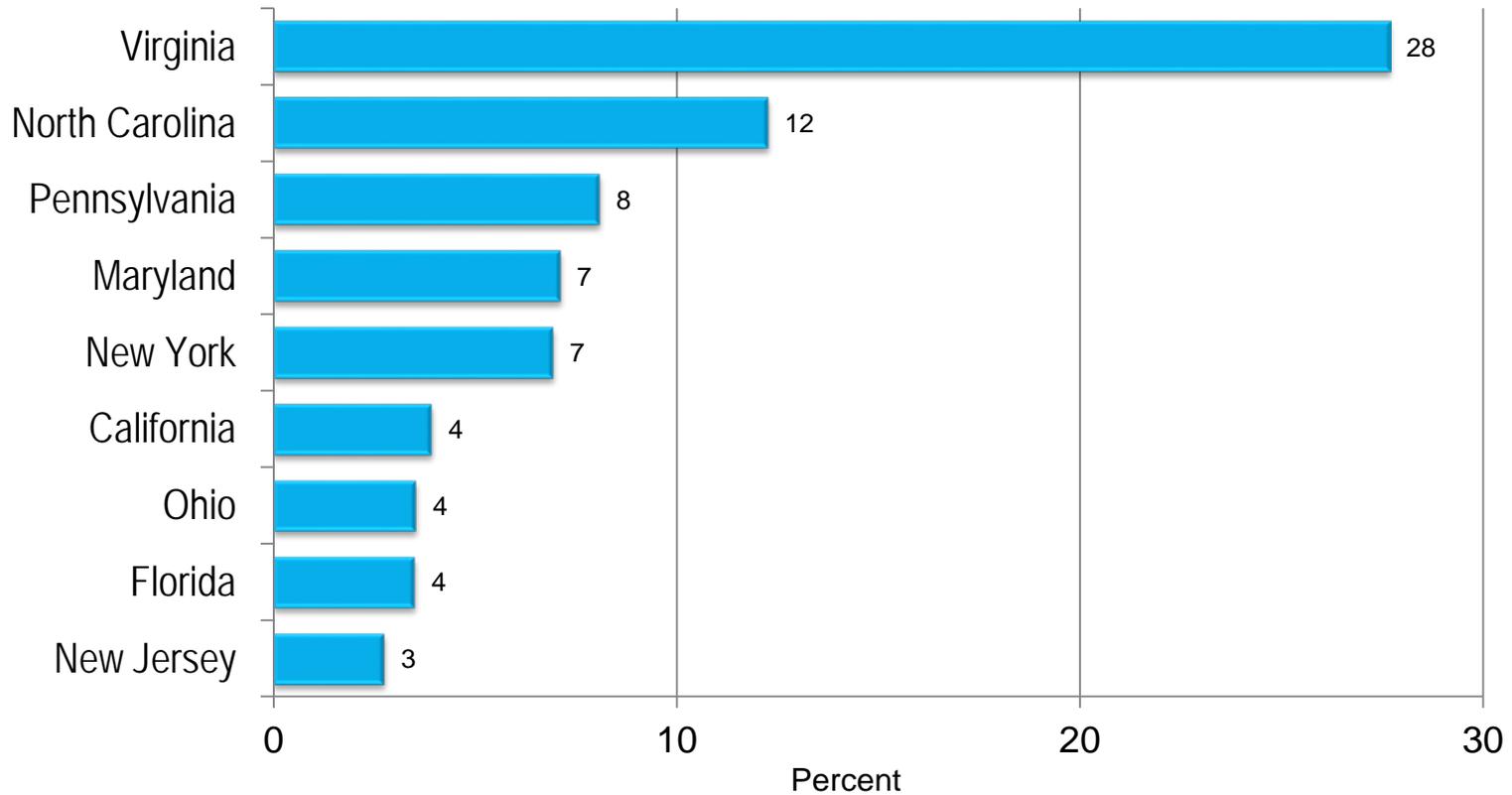
Base: Overnight Person-Trips



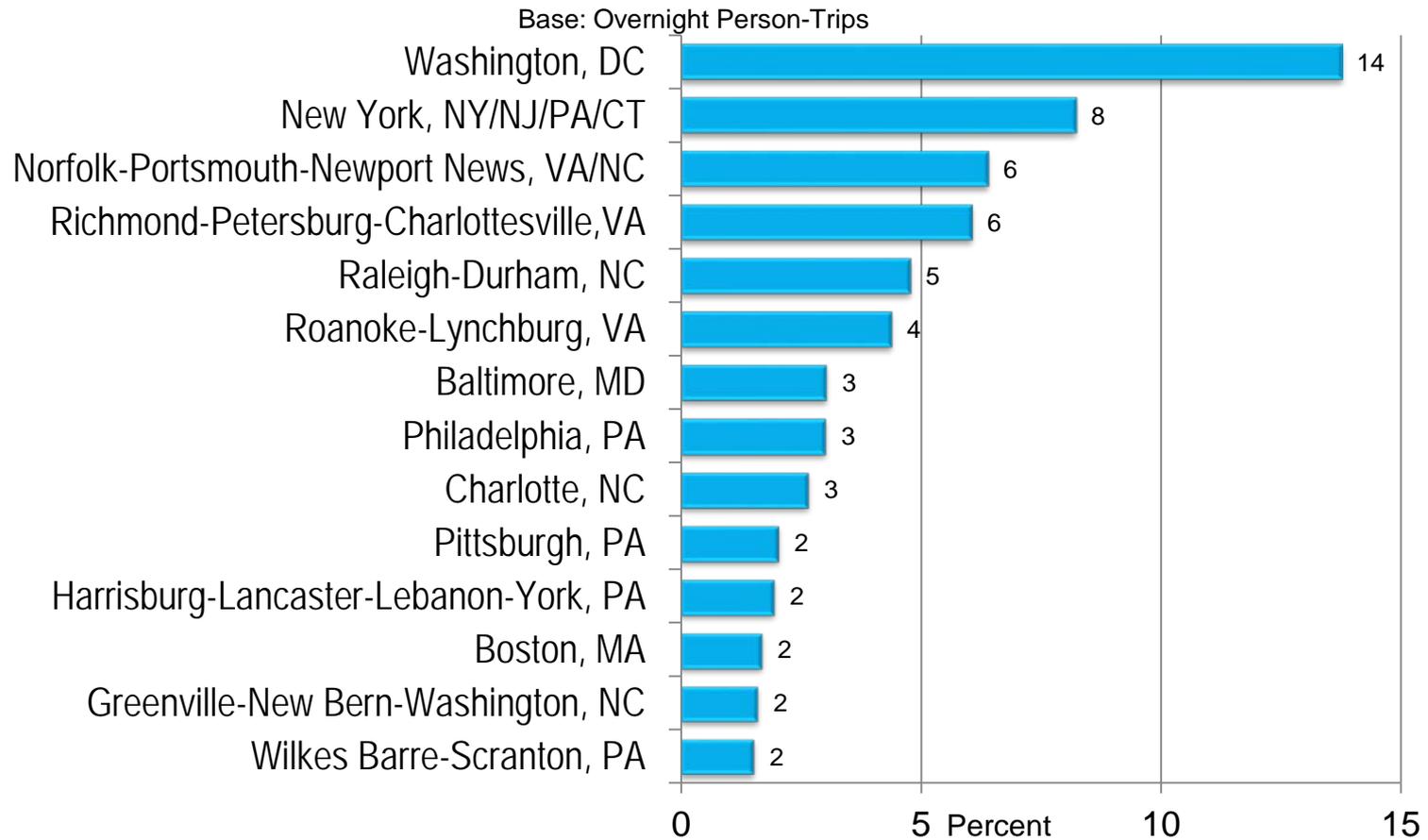
- States contributing 5% or more
- States contributing 3% - 5%
- DMA's contributing more than 2%

# State Origin Of Trip

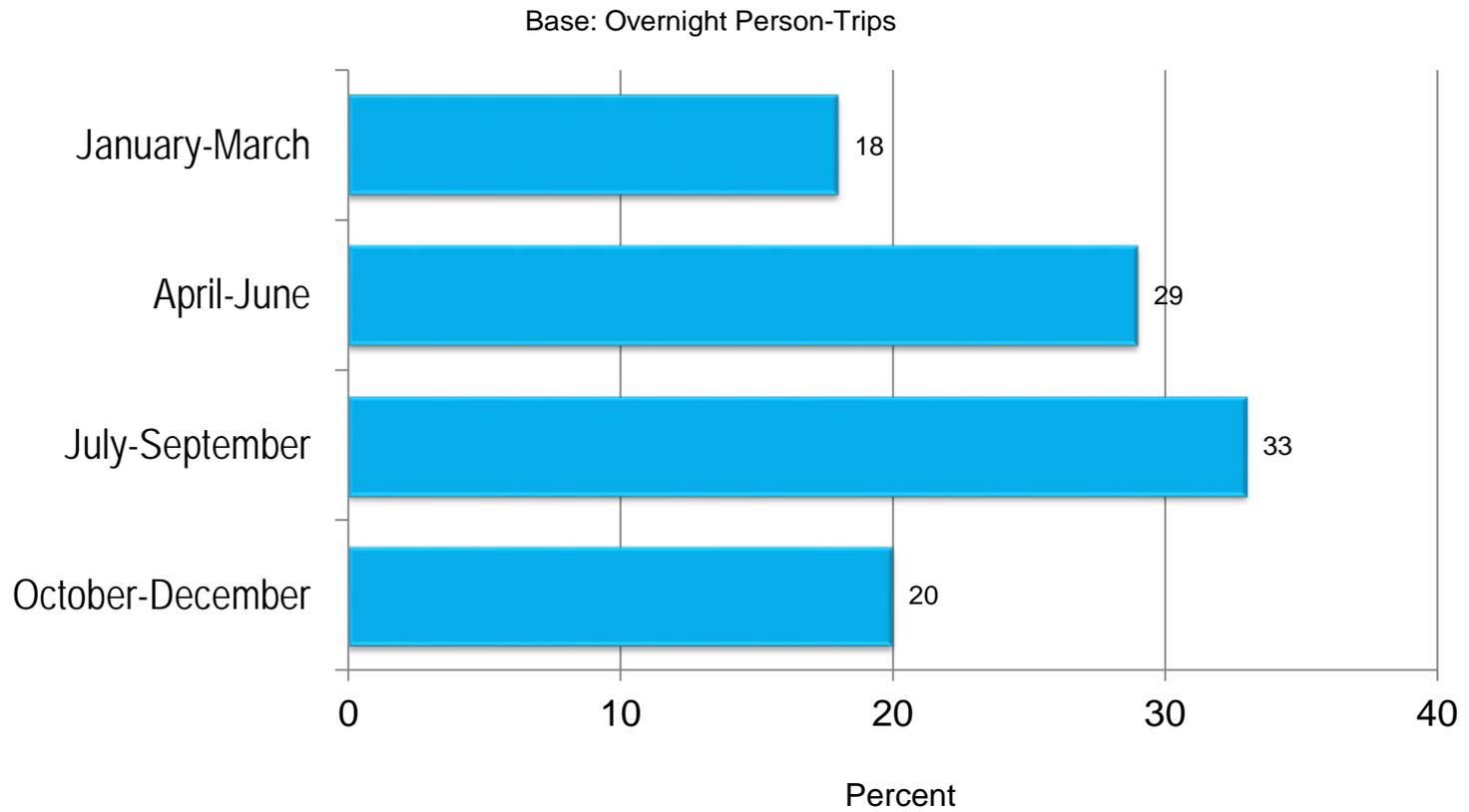
Base: Overnight Person-Trips



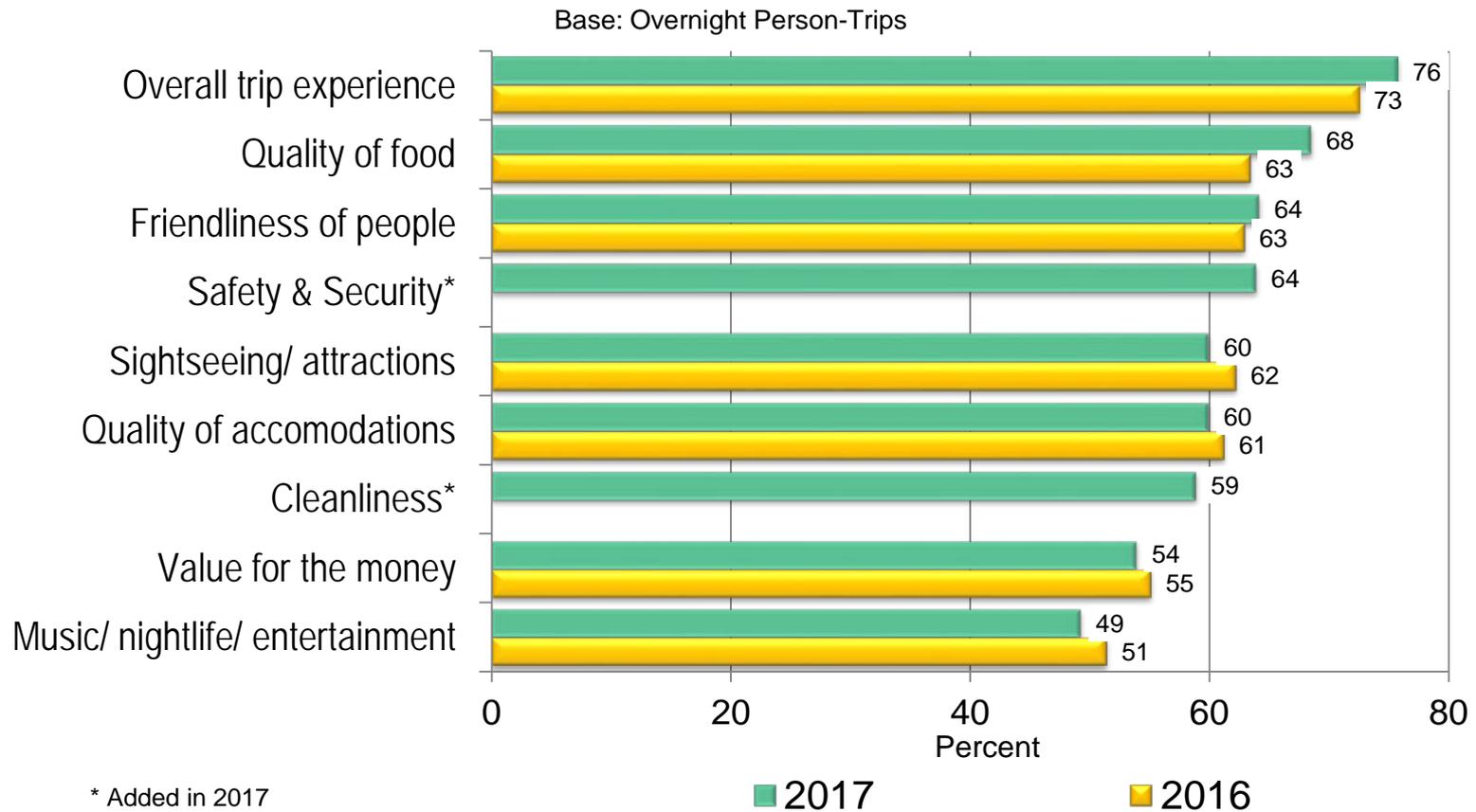
# DMA Origin Of Trip



# Season of Trip

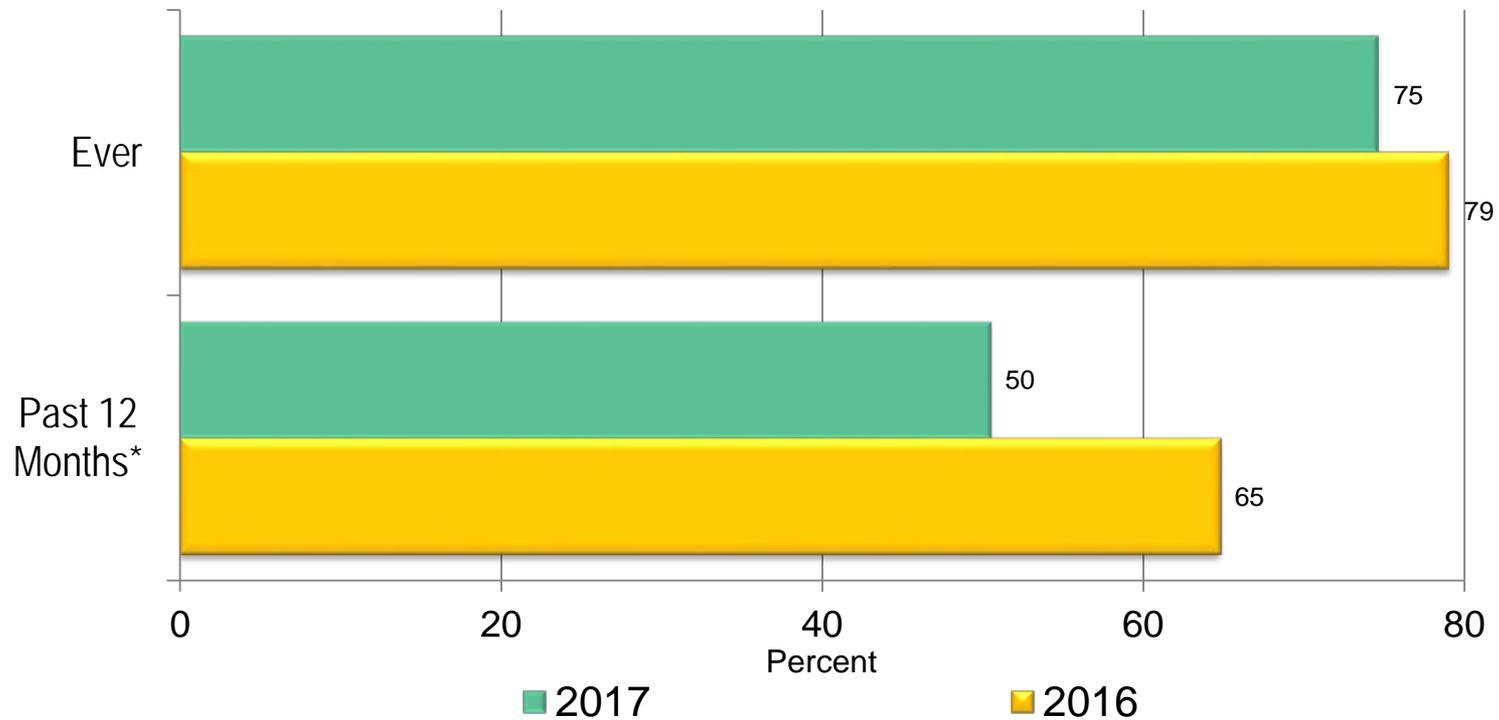


# % Very Satisfied with Trip



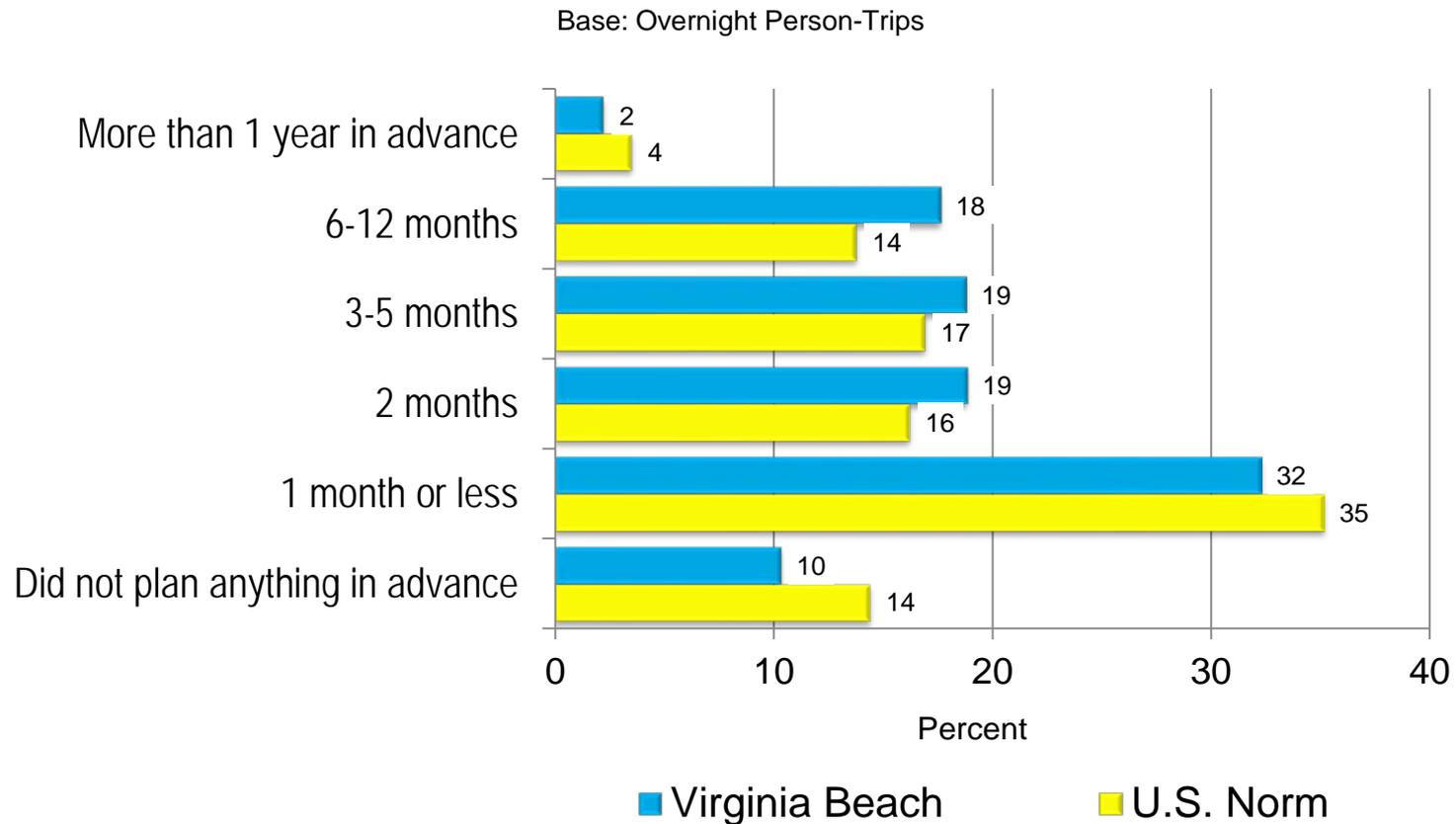
# Past Visitation to Virginia Beach

Base: Overnight Person-Trips



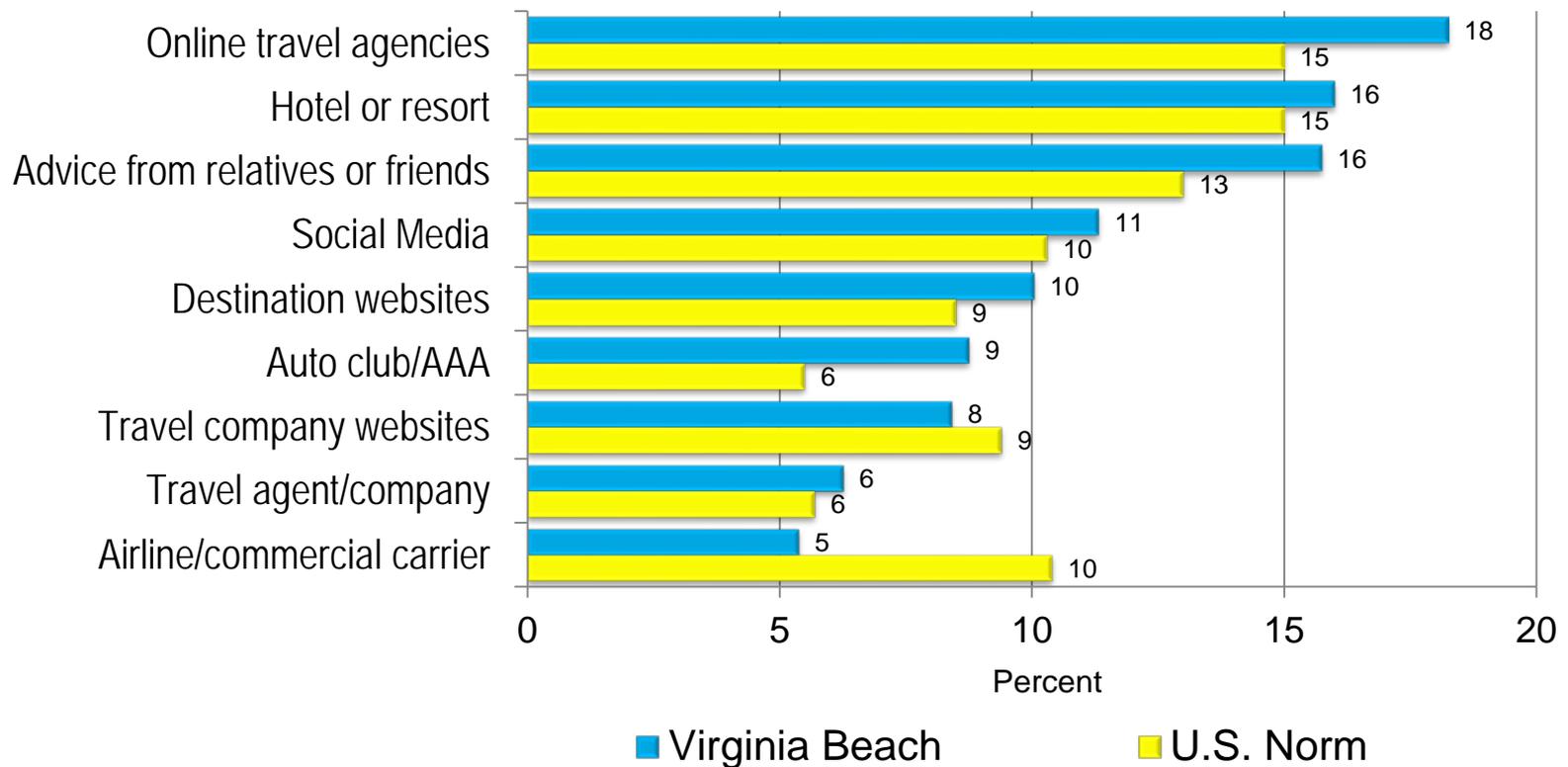
\* Question wording changed in 2017

# Length of Trip Planning



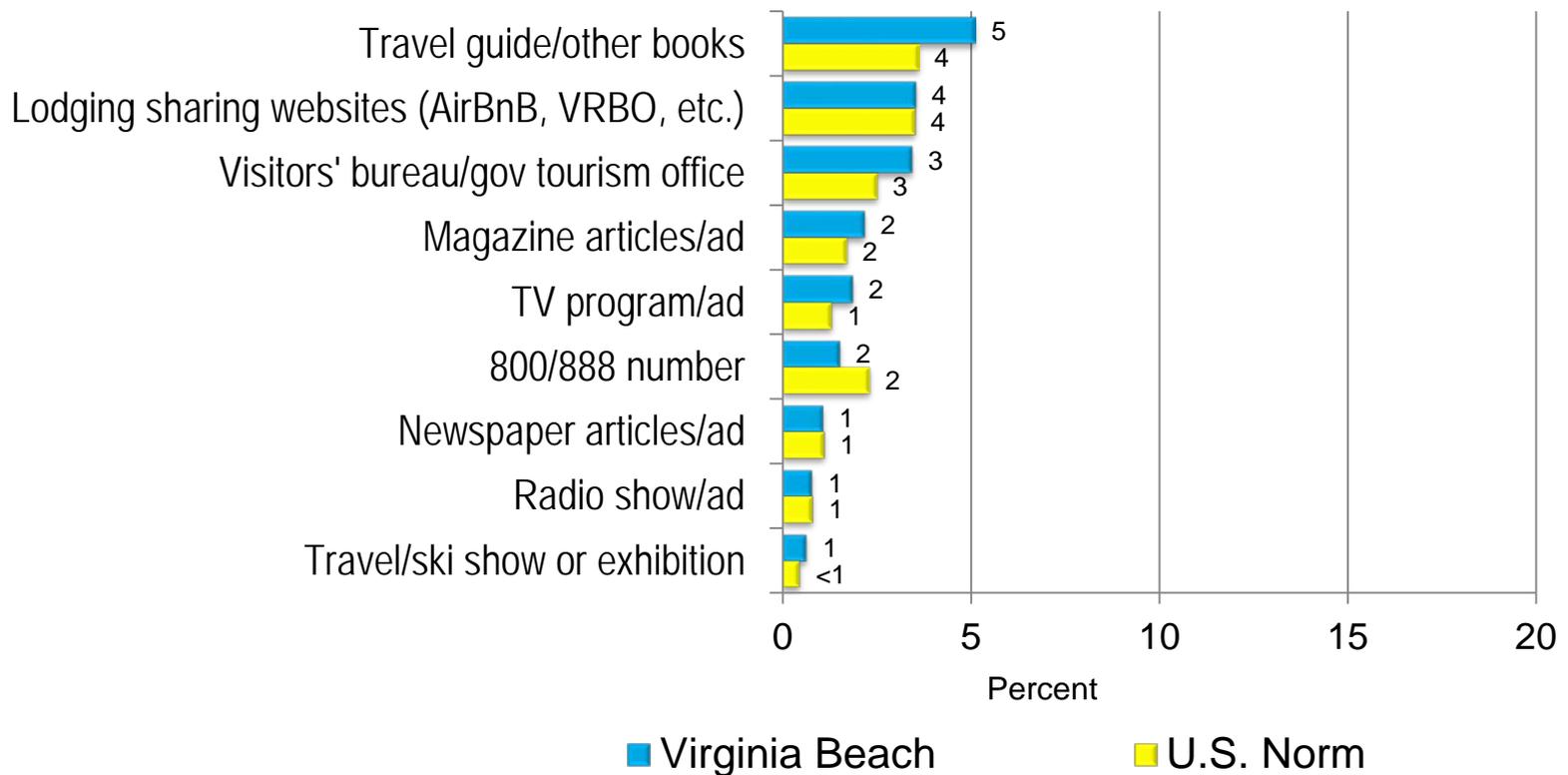
# Trip Planning Information Sources

Base: Overnight Person-Trips



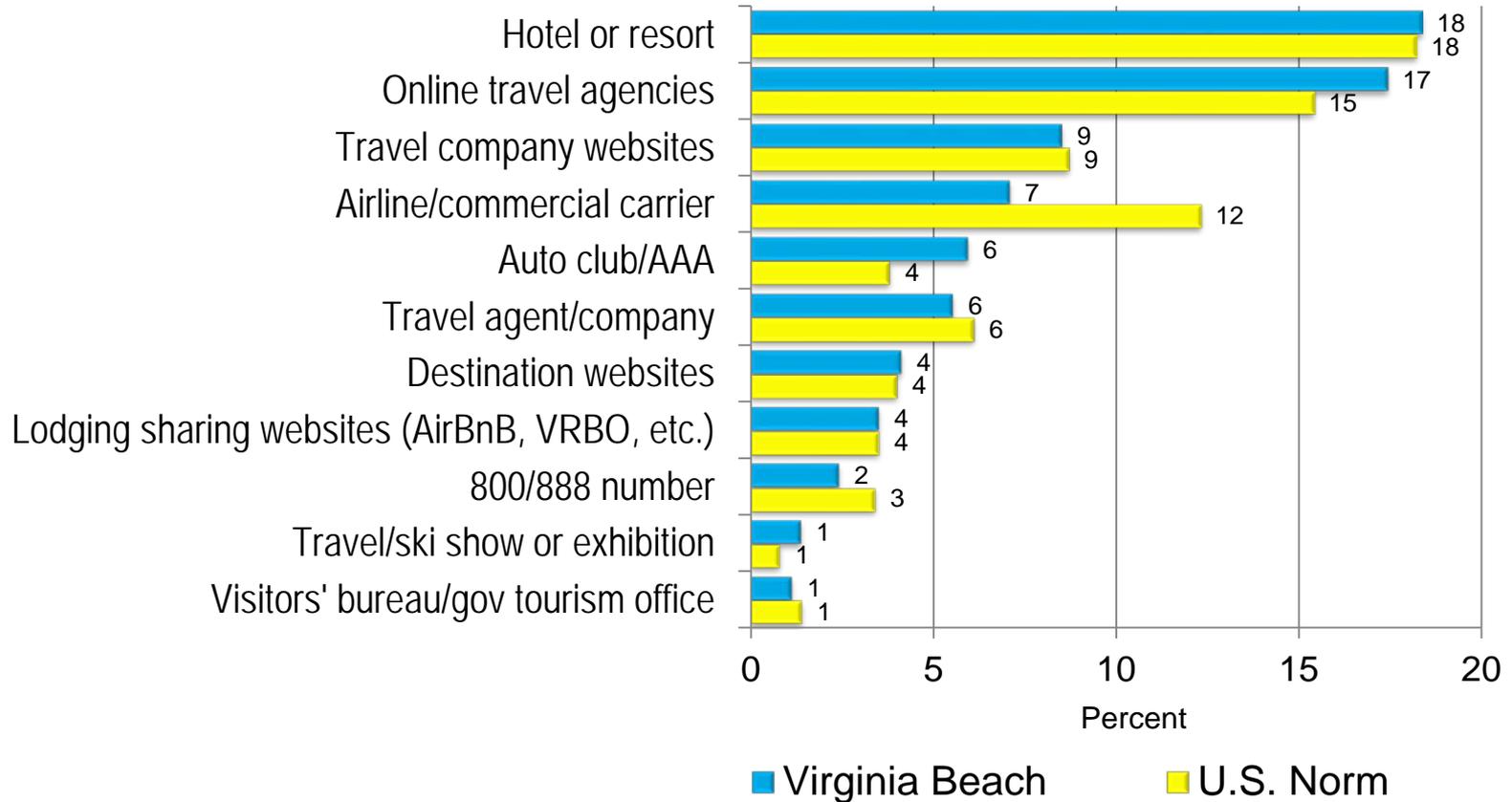
# Trip Planning Information Sources (Cont'd)

Base: Overnight Person-Trips

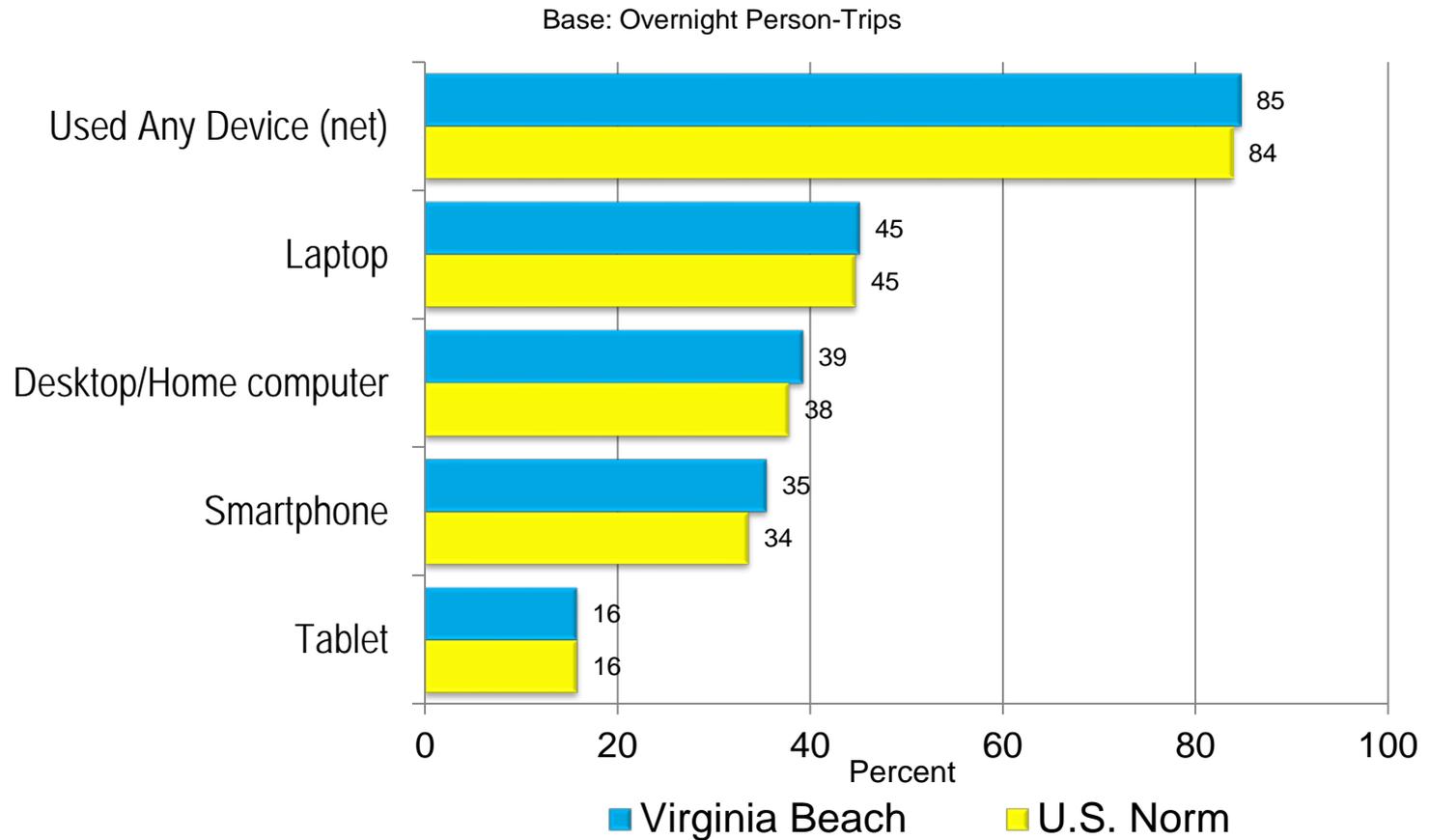


# Method of Booking

Base: Overnight Person-Trips

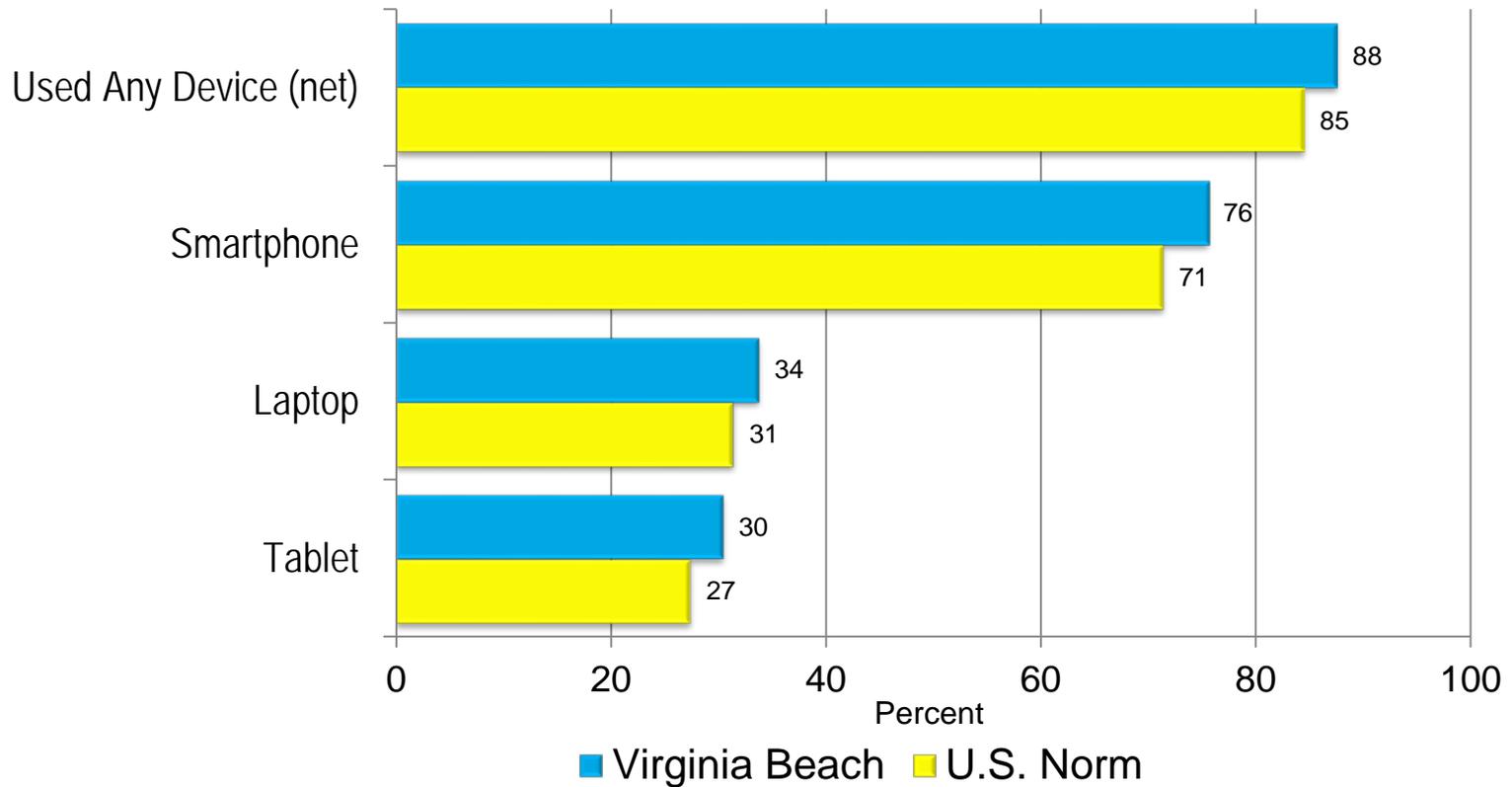


# Devices Used for Trip Planning



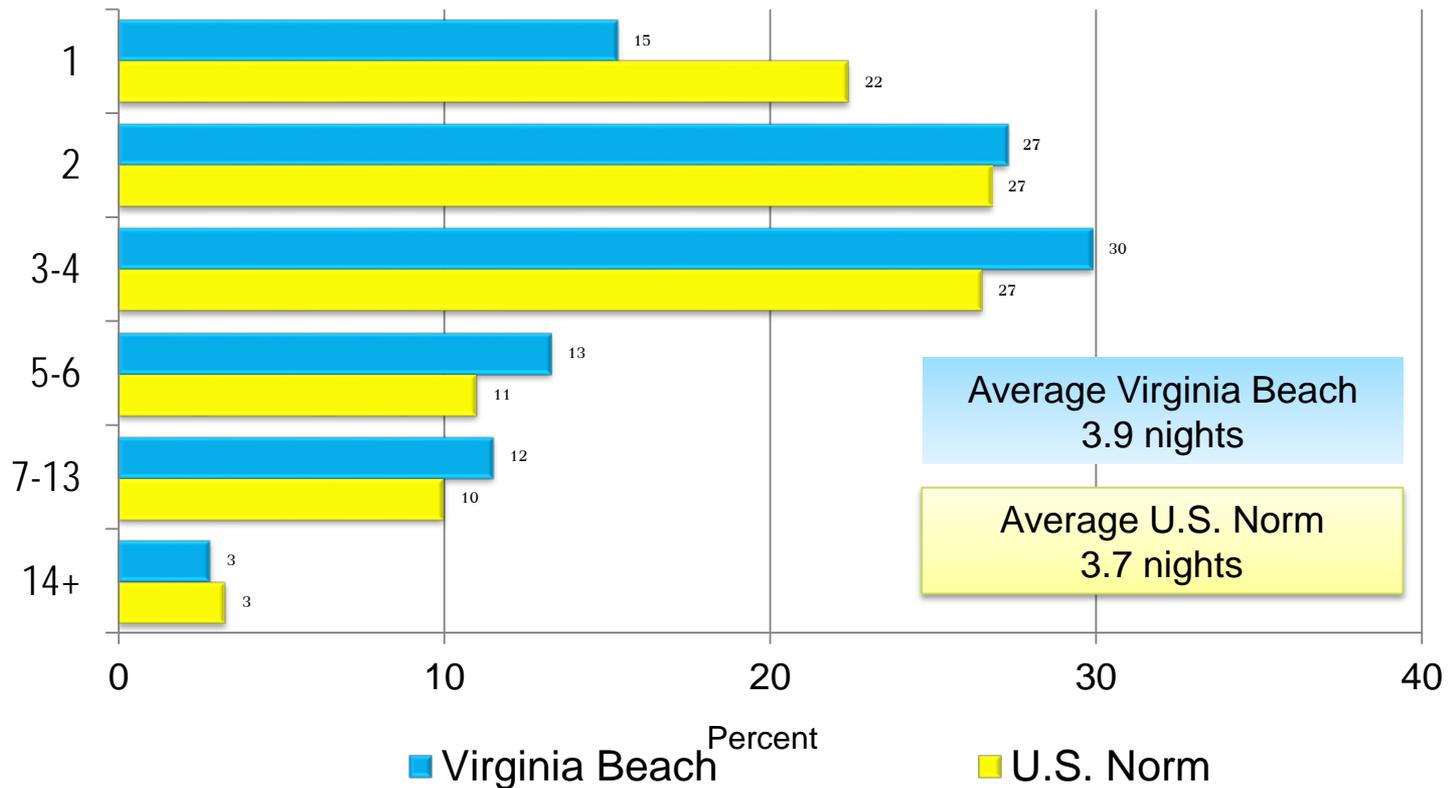
# Devices Used During Trip

Base: Overnight Person-Trips



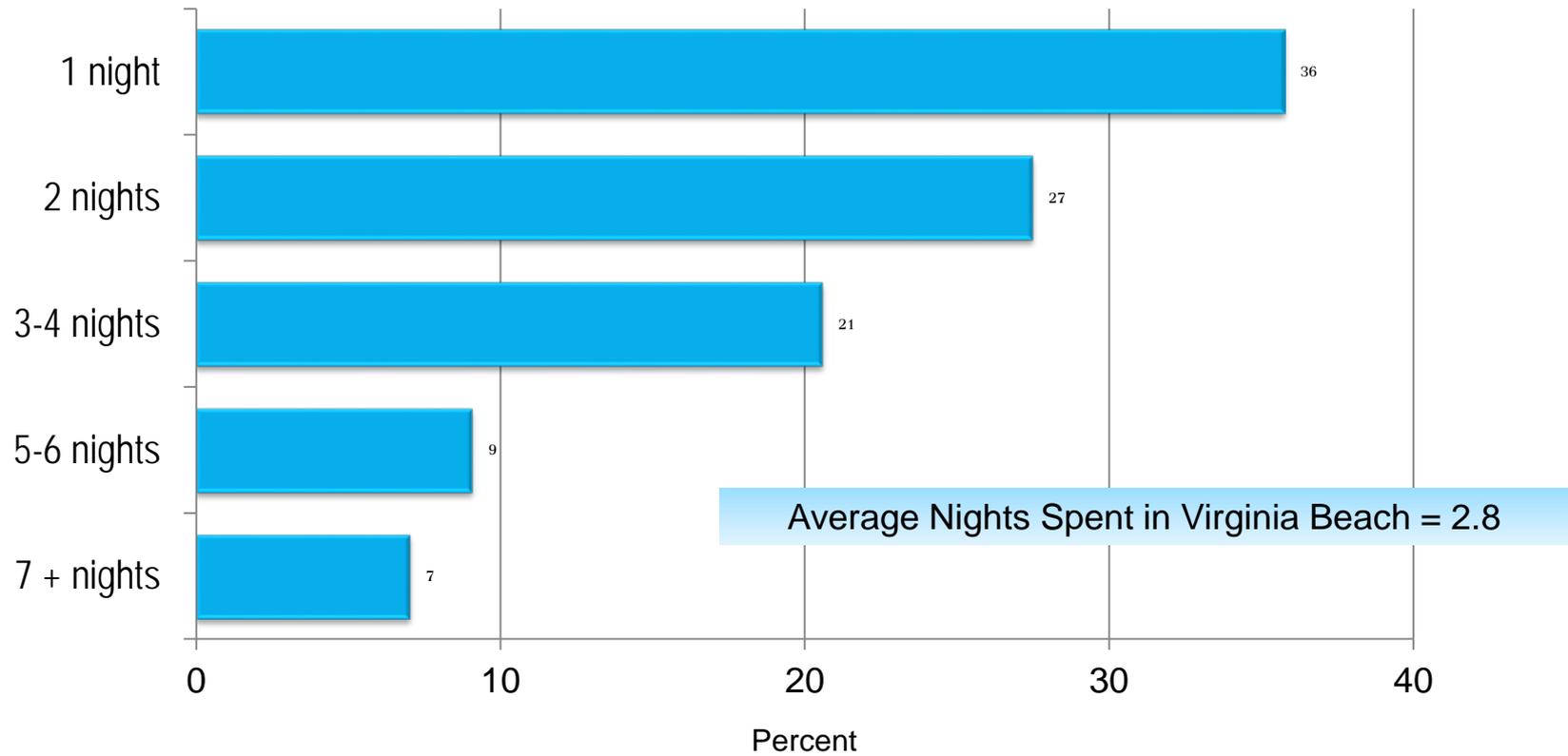
# Total Nights Away on Trip

Base: Overnight Person-Trips

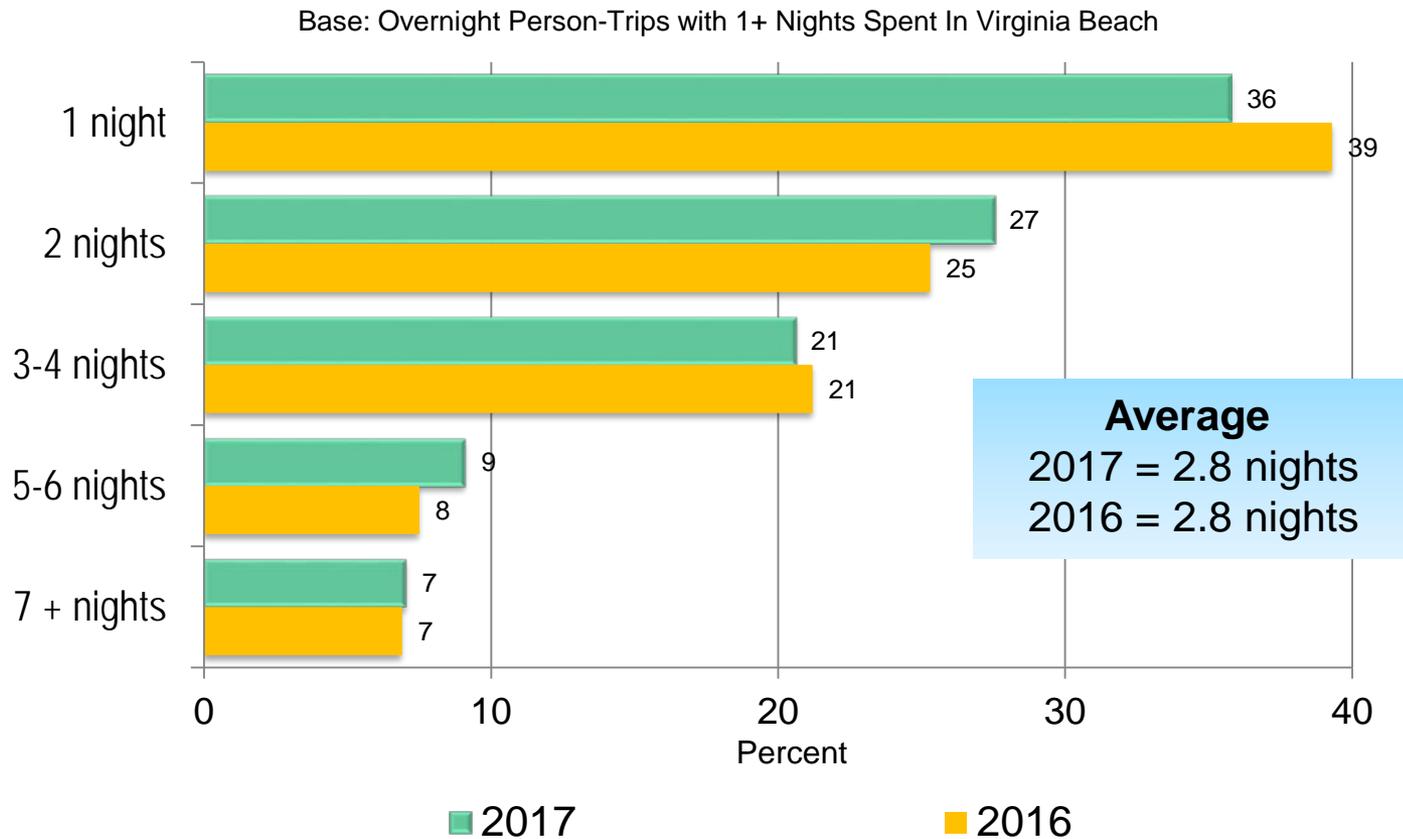


# Number of Nights Spent in Virginia Beach

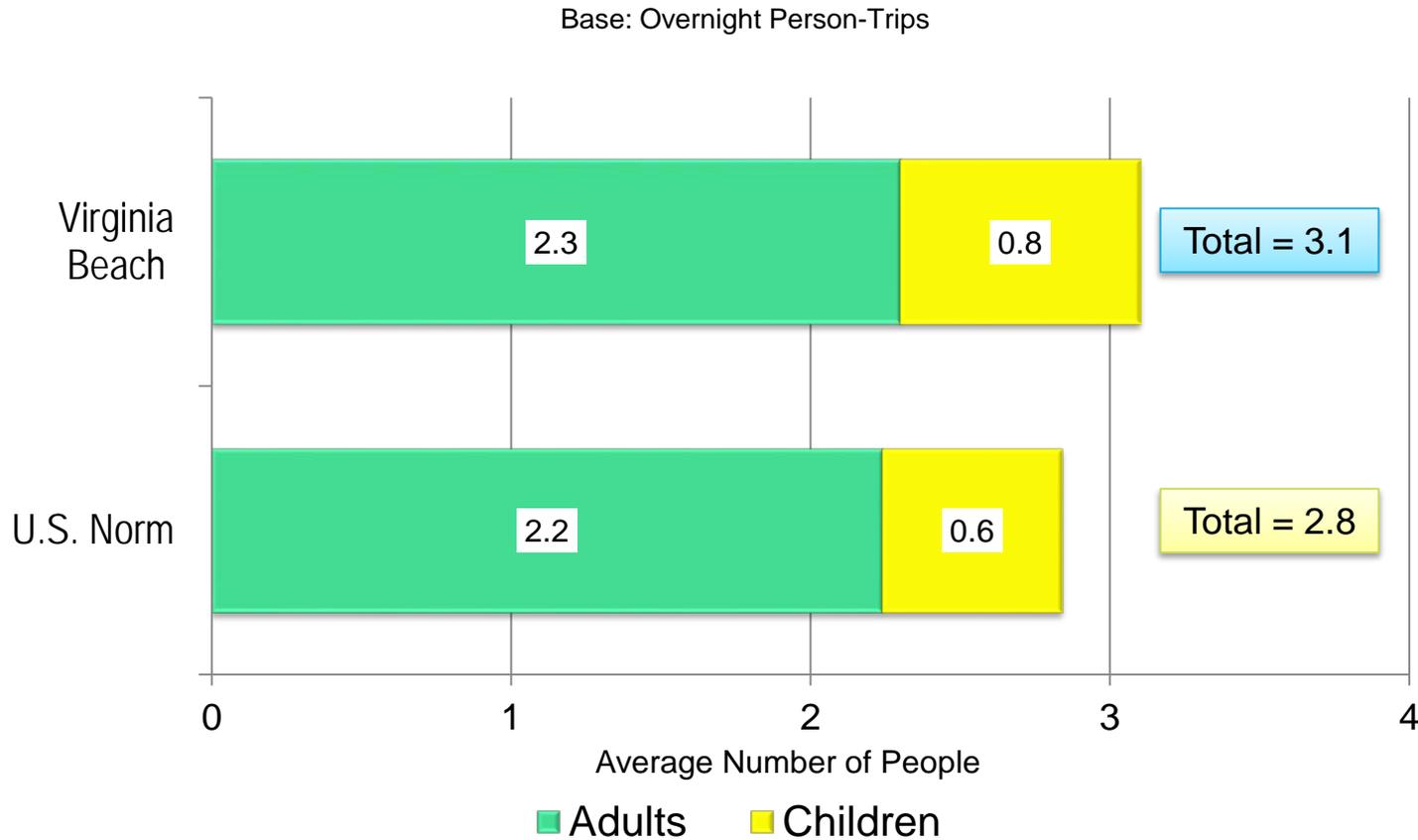
Base: Overnight Person-Trips with 1+ Nights Spent In Virginia Beach



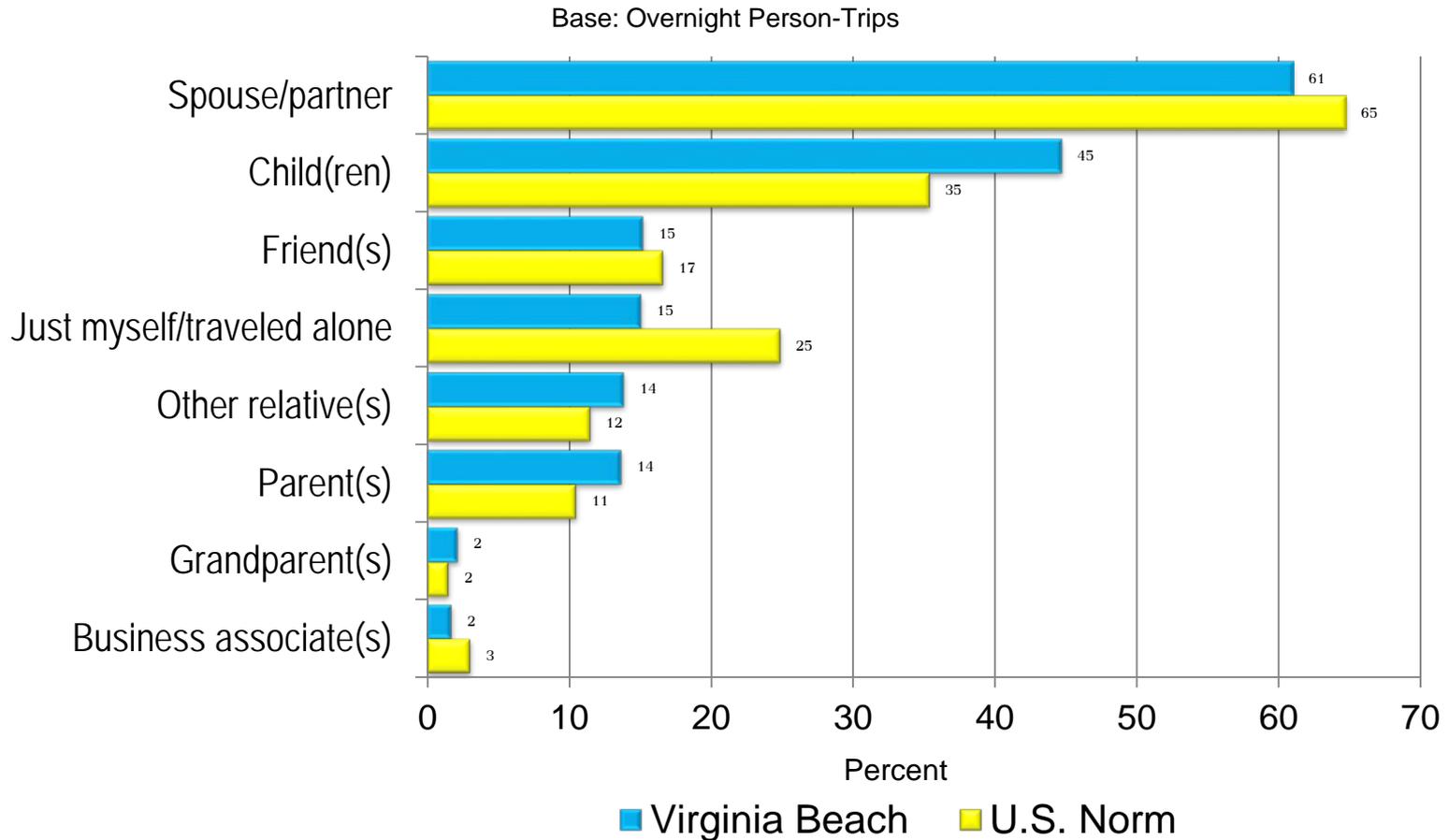
# Number of Nights Spent in Virginia Beach - 2017 vs. 2016



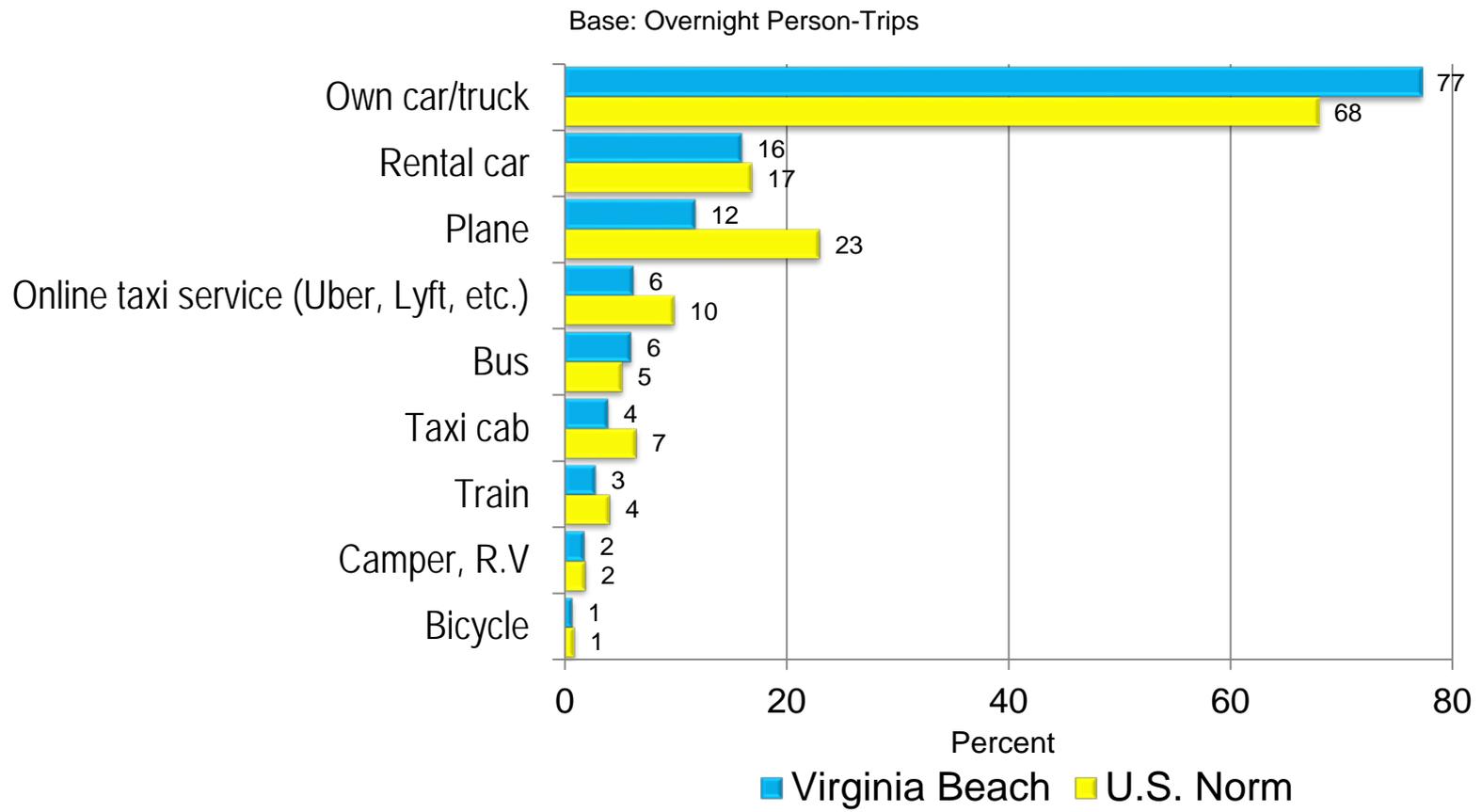
# Size of Travel Party



# Composition of Immediate Travel Party

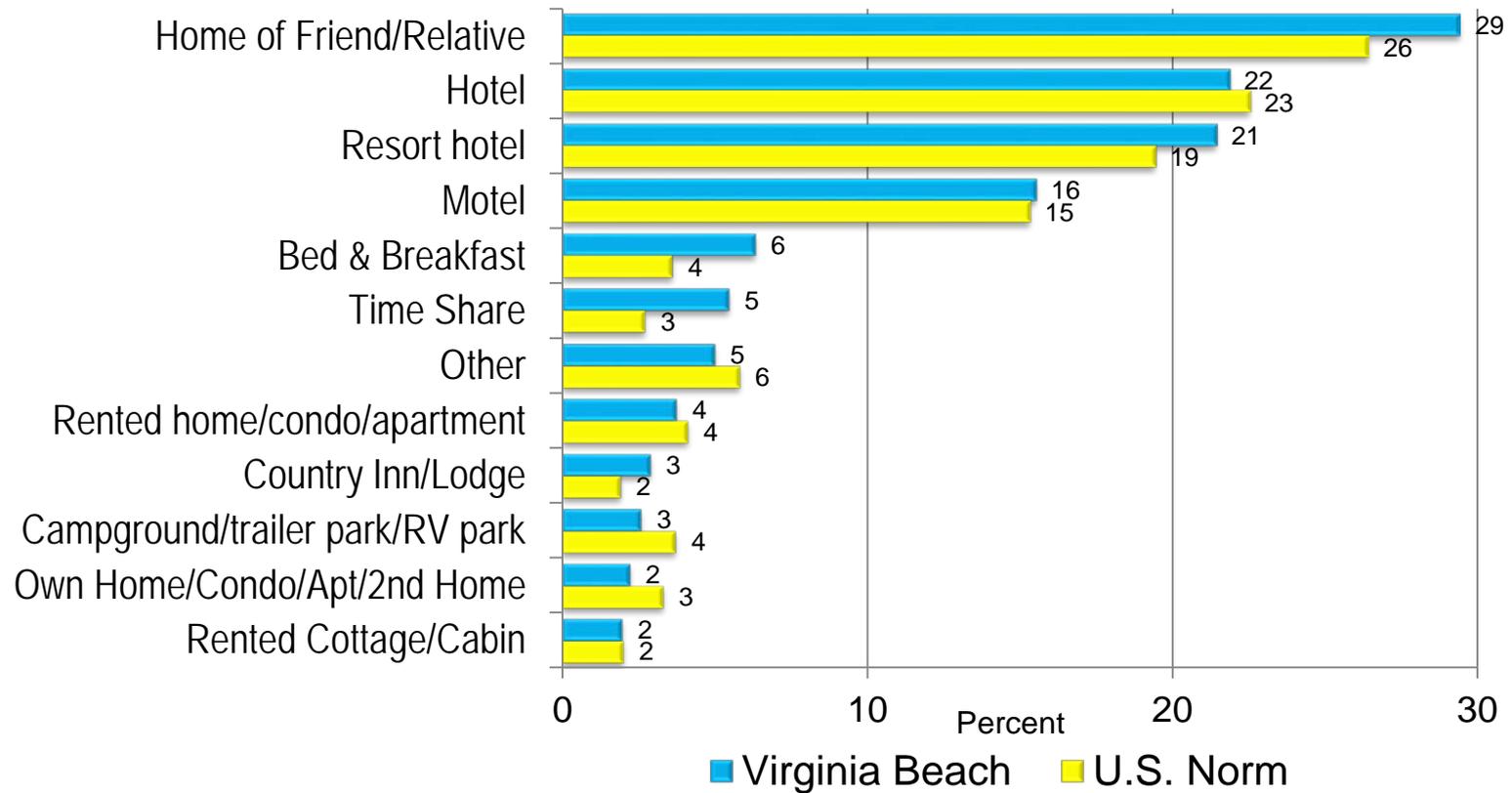


# Transportation



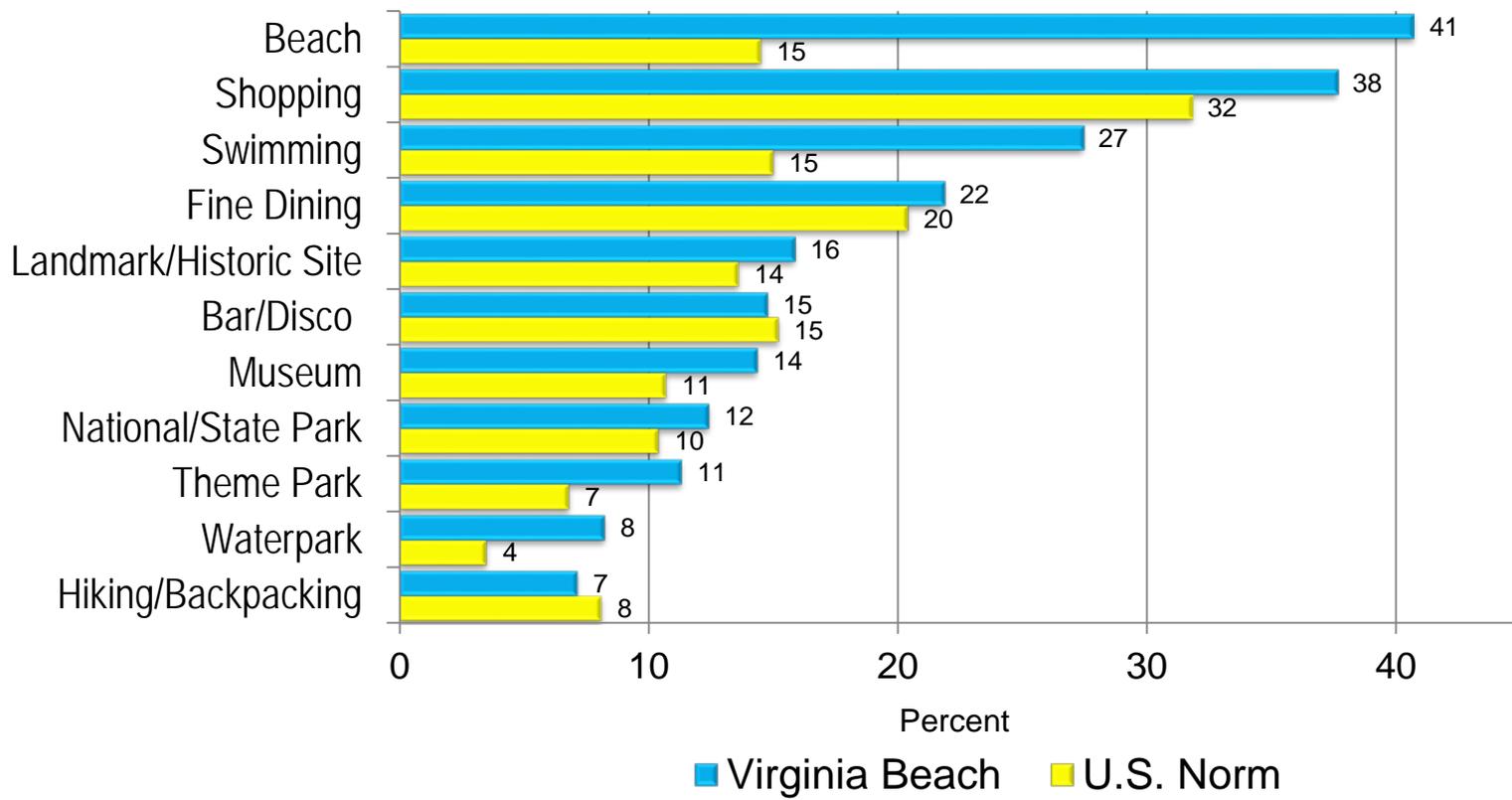
# Accommodations

Base: Overnight Person-Trips



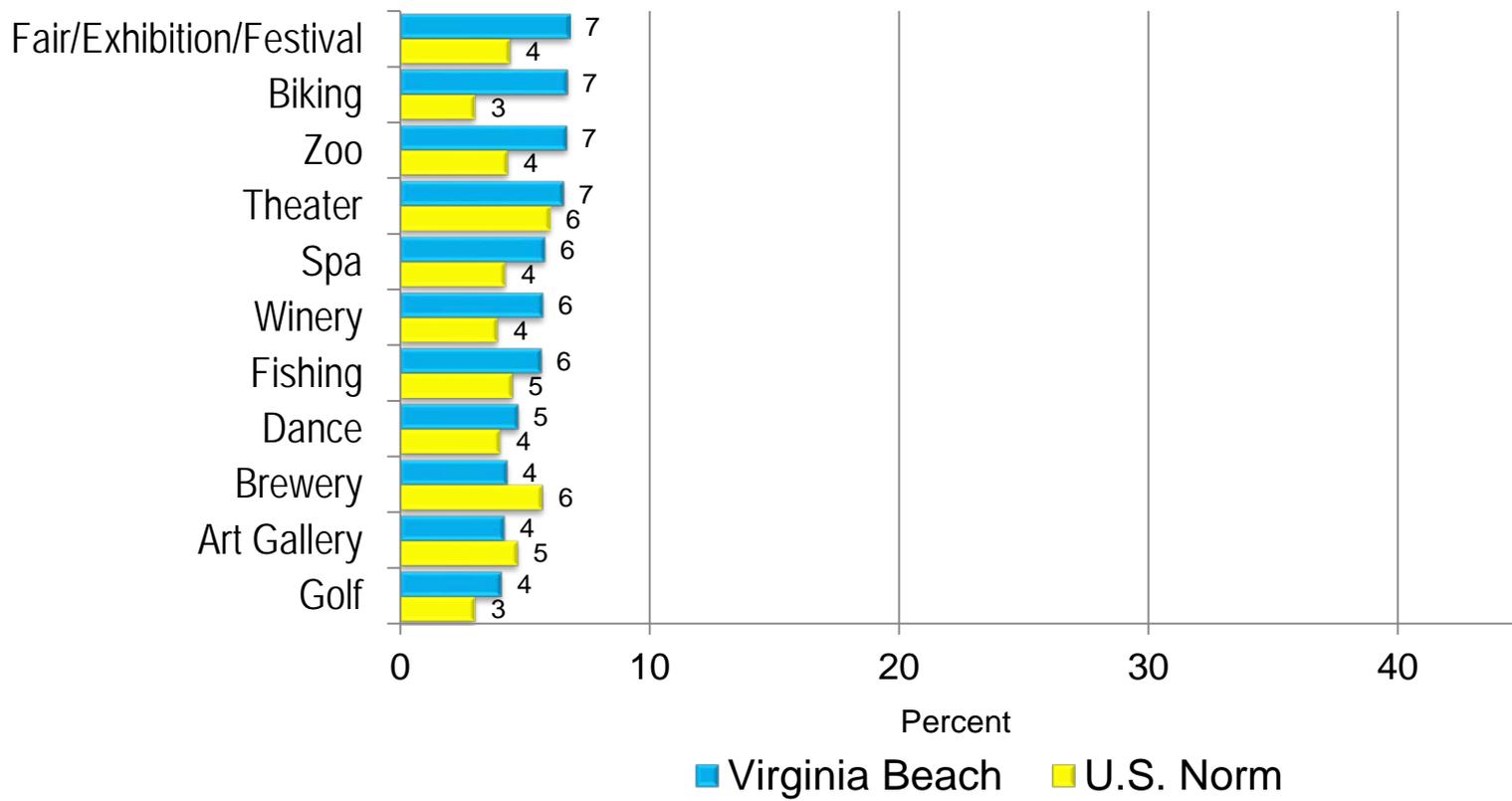
# Activities and Experiences

Base: Overnight Person-Trips



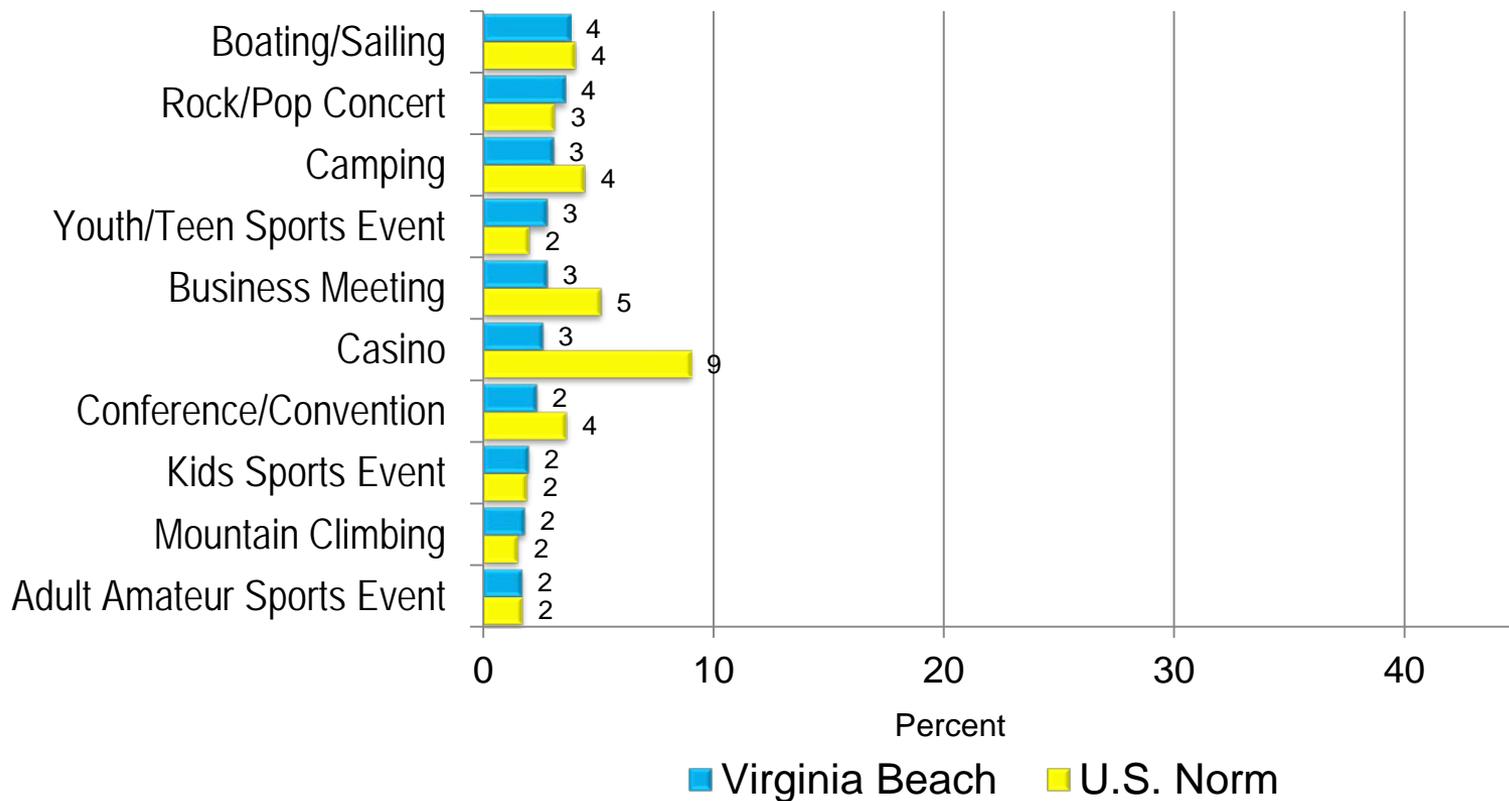
# Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



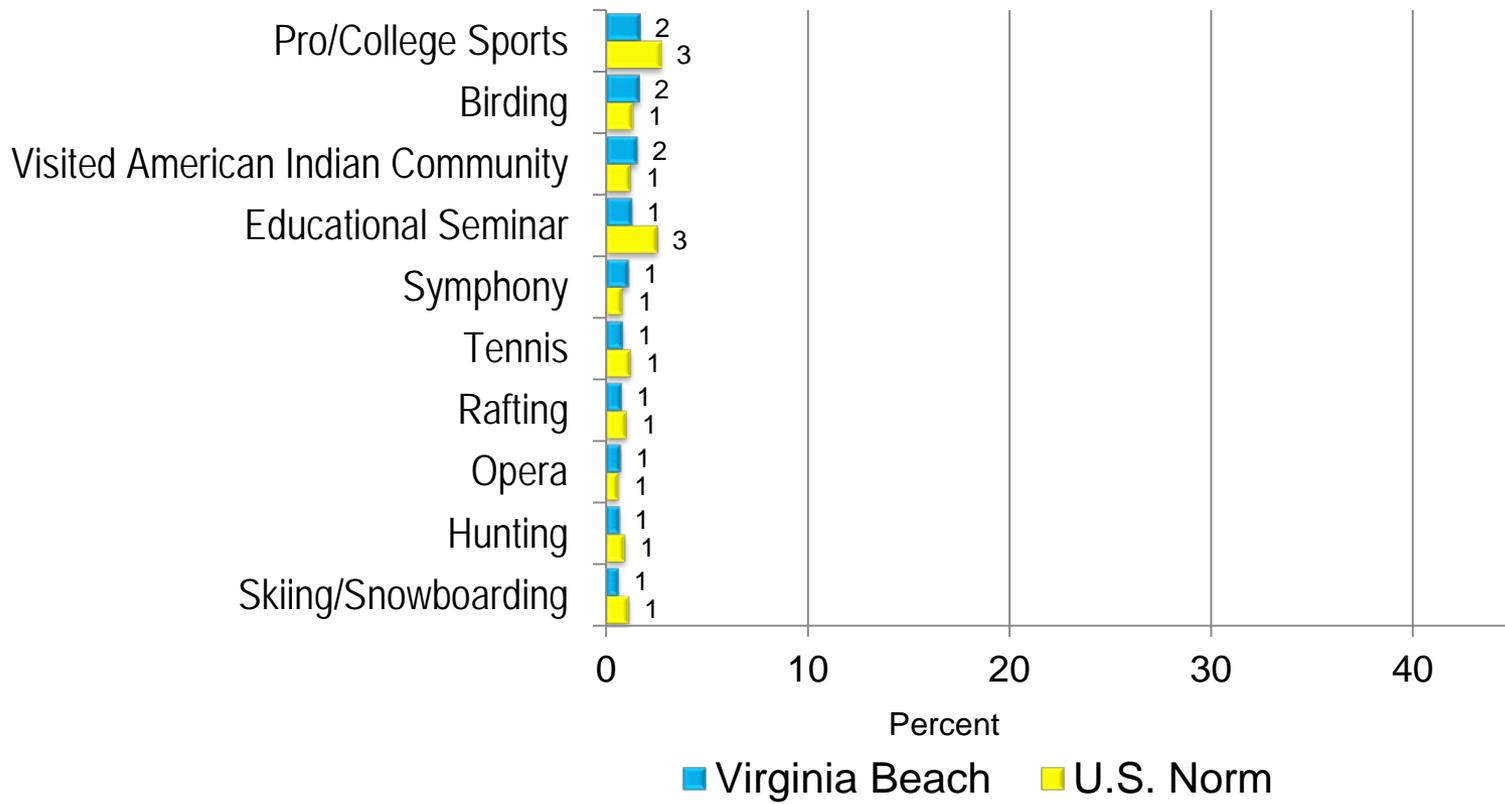
# Activities and Experiences (Cont'd)

Base: Overnight Person-Trips

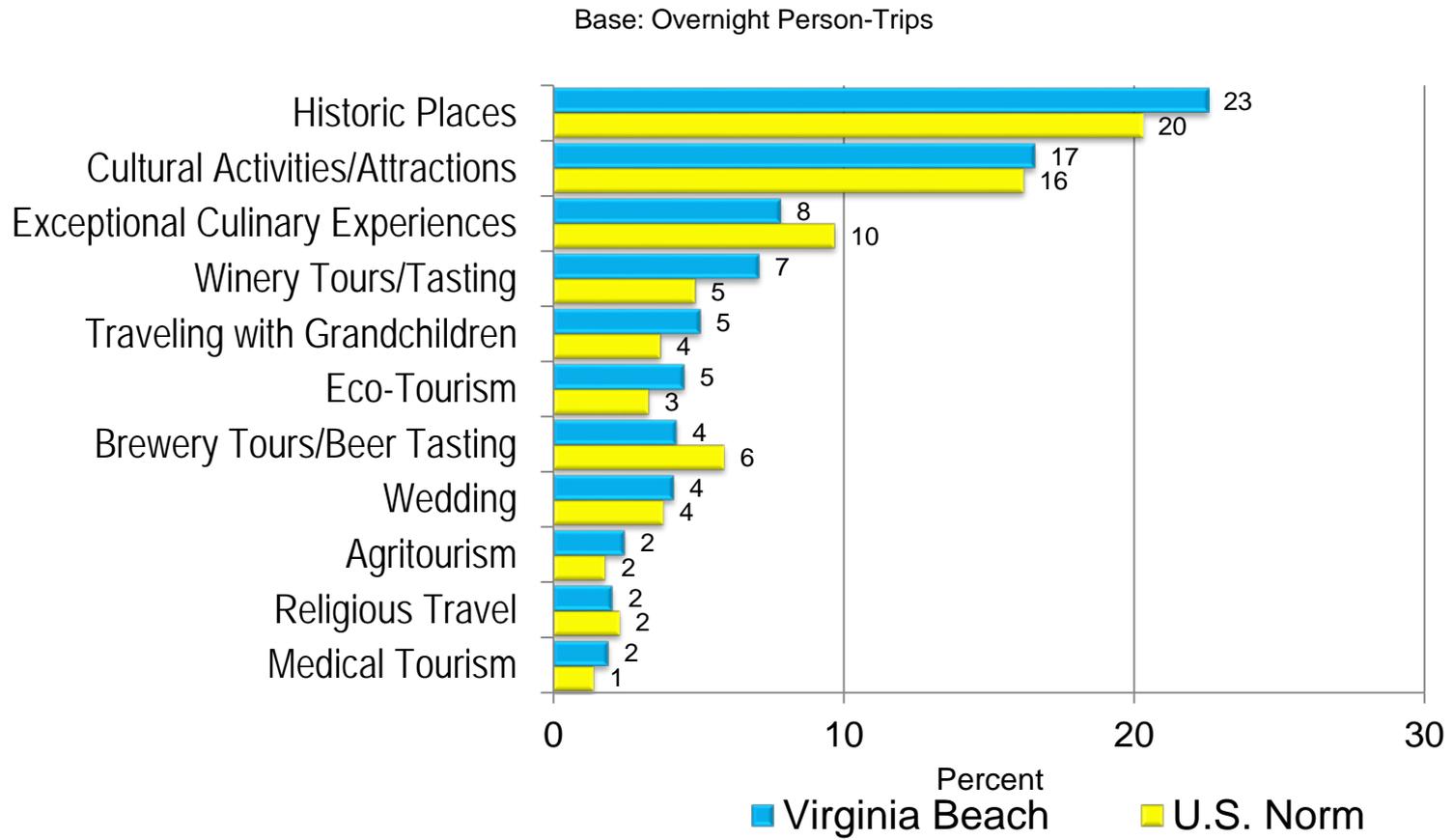


# Activities and Experiences (Cont'd)

Base: Overnight Person-Trips

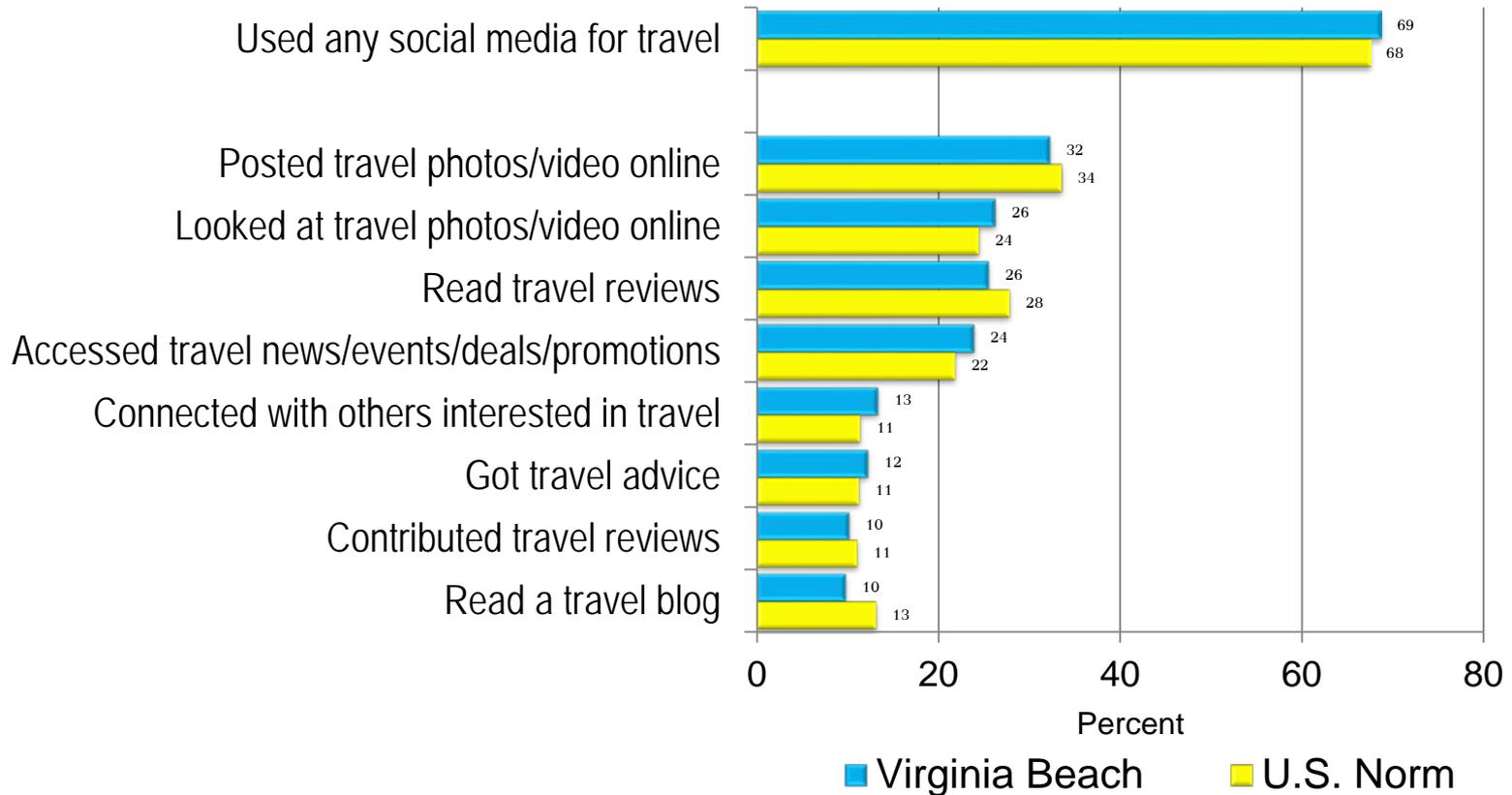


# Activities of Special Interest

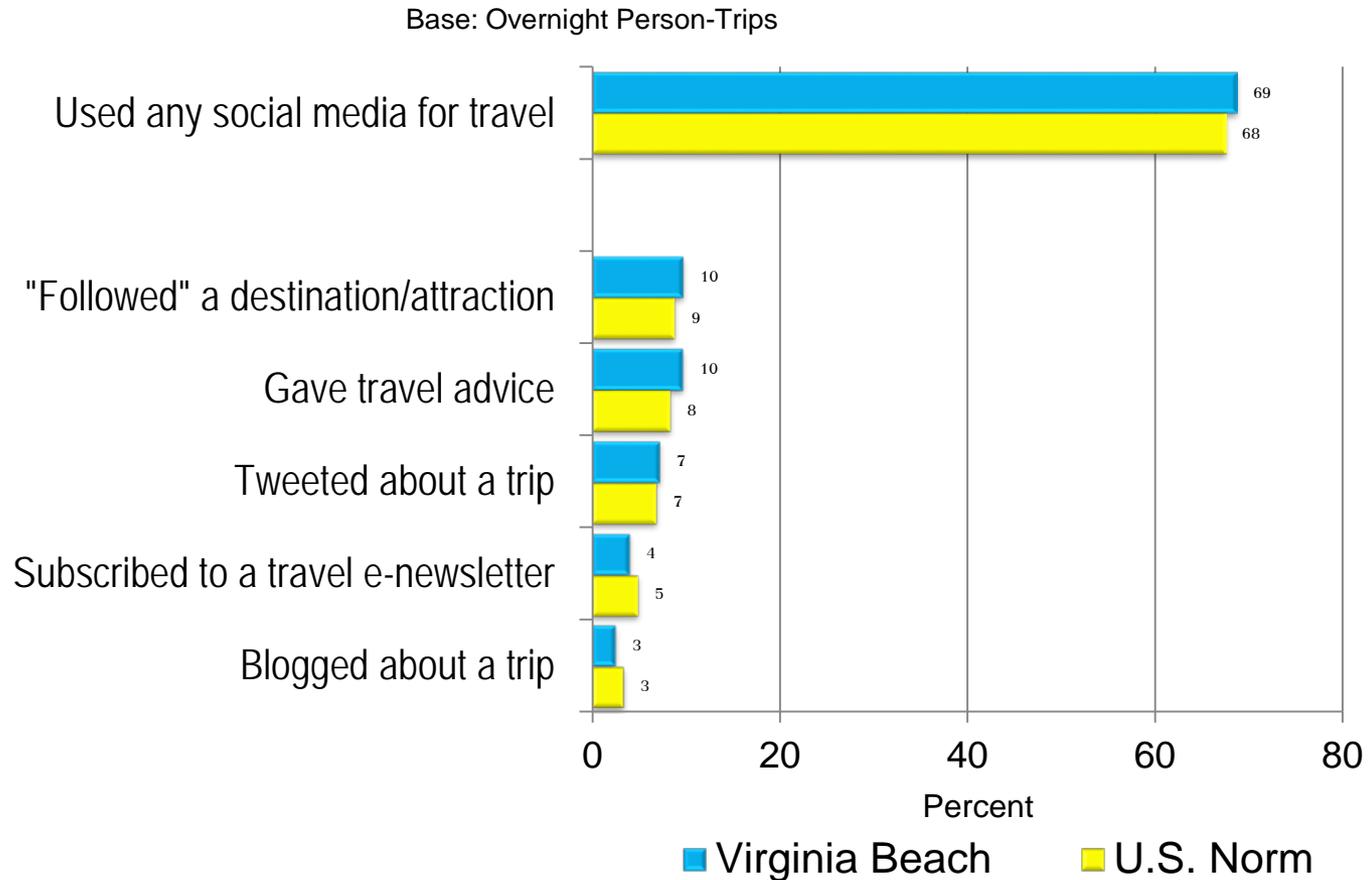


# Online Social Media Use by Travelers

Base: Overnight Person-Trips

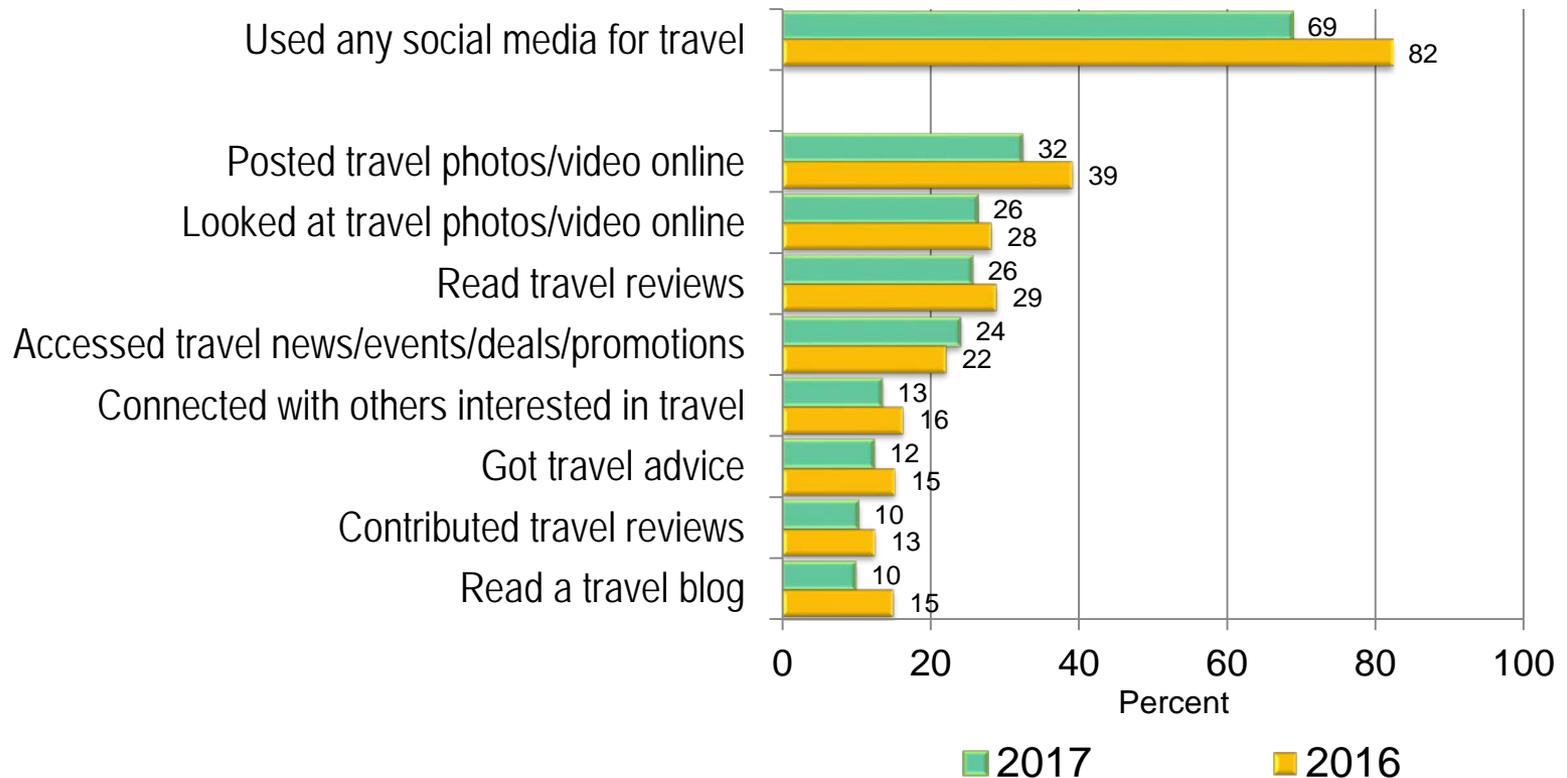


# Online Social Media Use by Travelers (Cont'd)



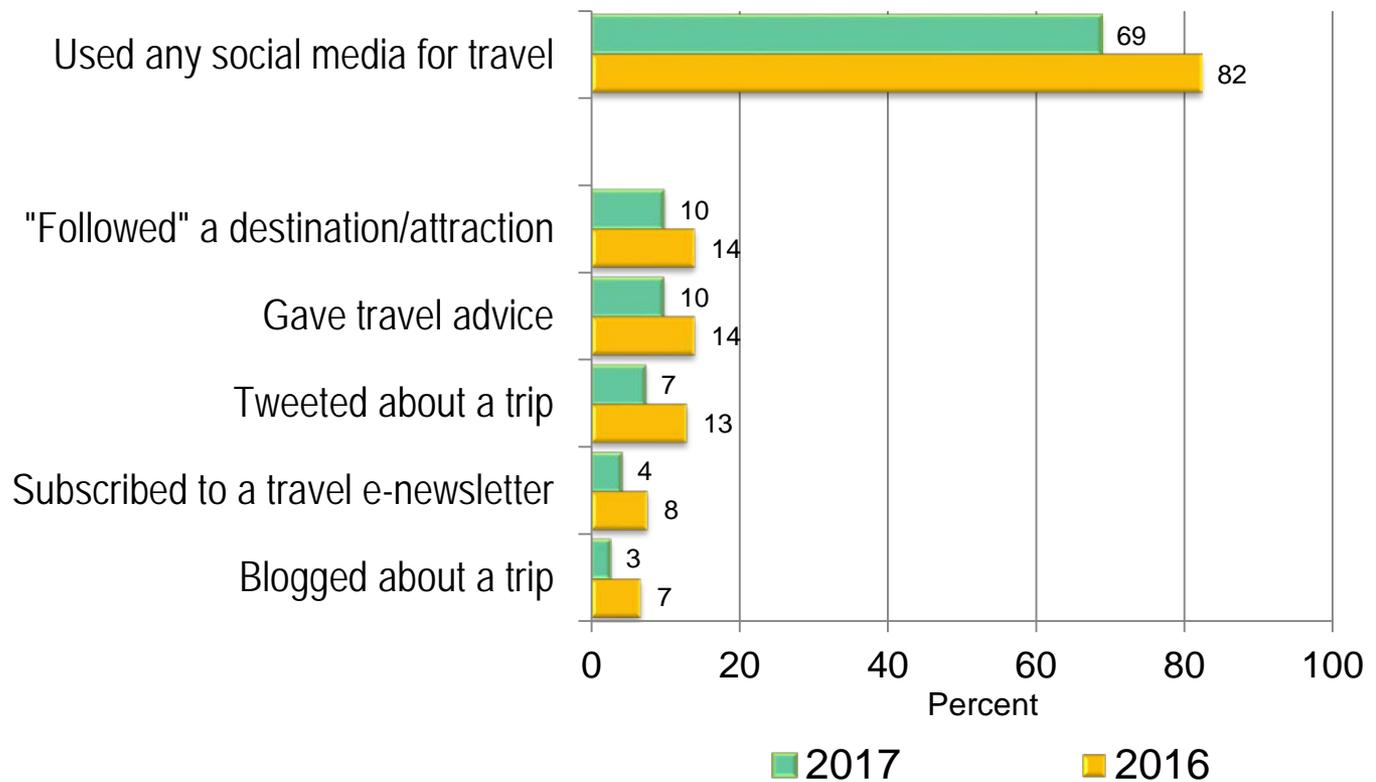
# Online Social Media Use by Travelers – 2017 vs. 2016

Base: Overnight Person-Trips



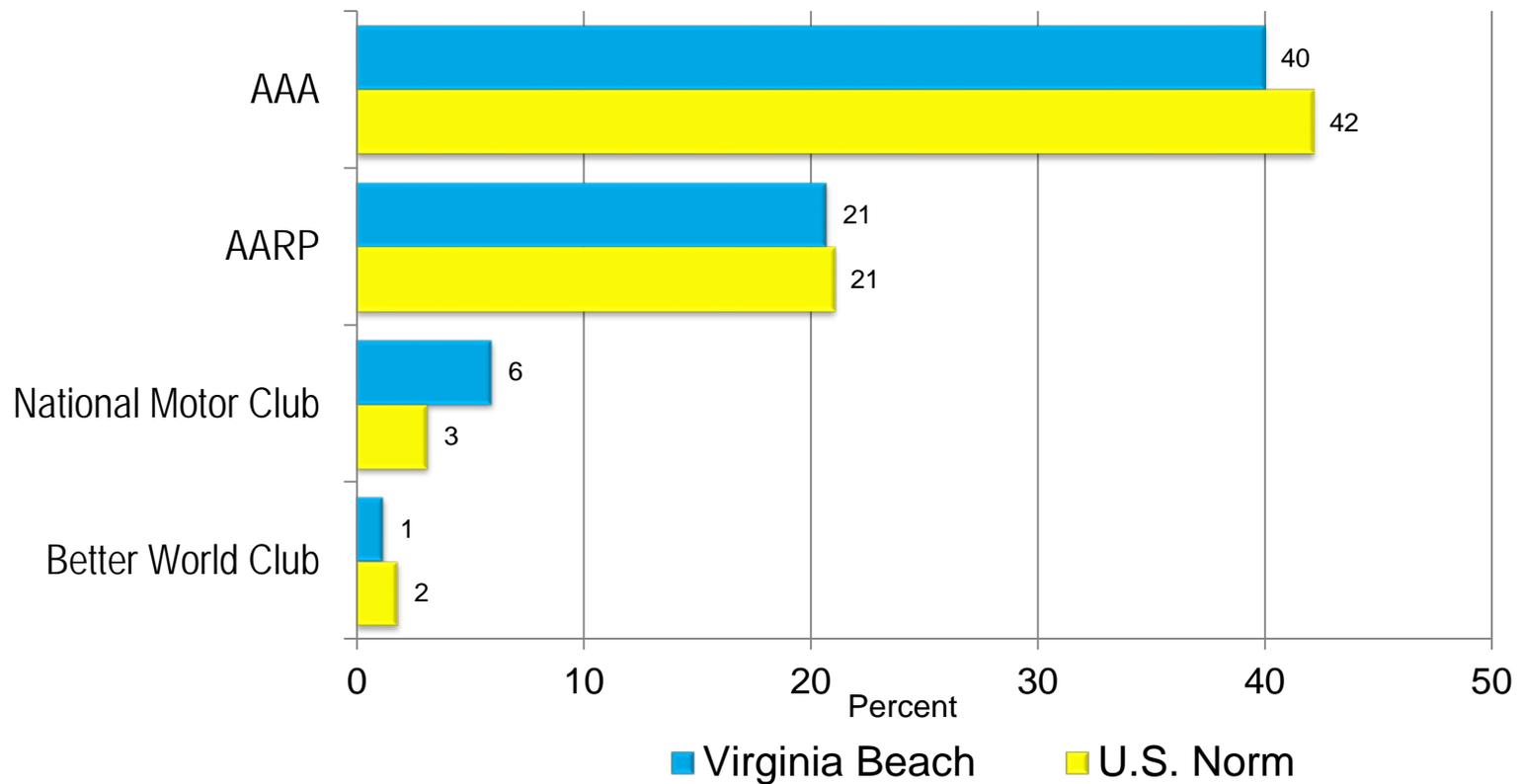
# Online Social Media Use by Travelers – 2017 vs. 2016 (Cont'd)

Base: Overnight Person-Trips



# Organization Membership

Base: Overnight Person-Trips



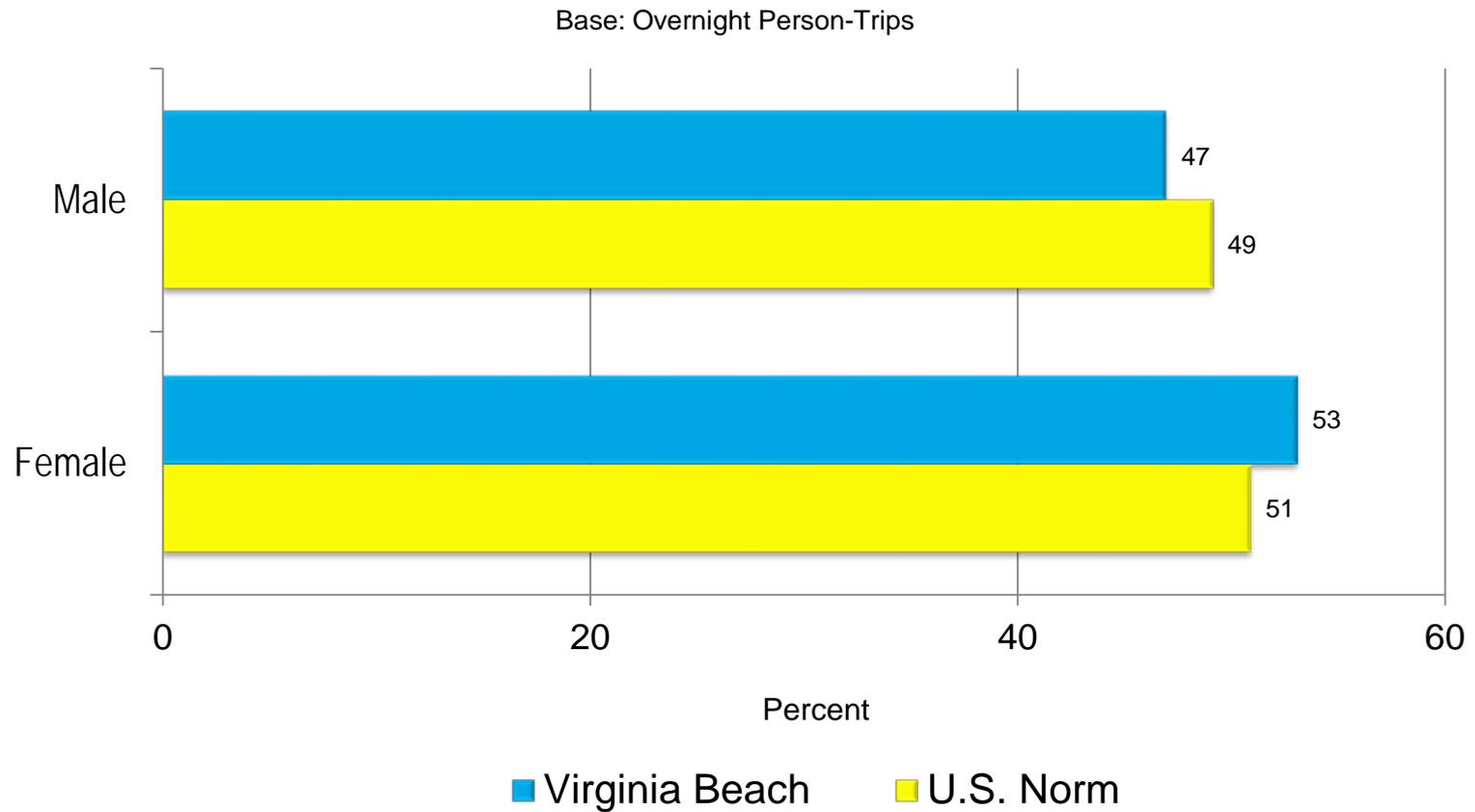


**Longwoods**  
INTERNATIONAL  
40 YEARS TOGETHER

# Demographic Profile of Overnight Visitors

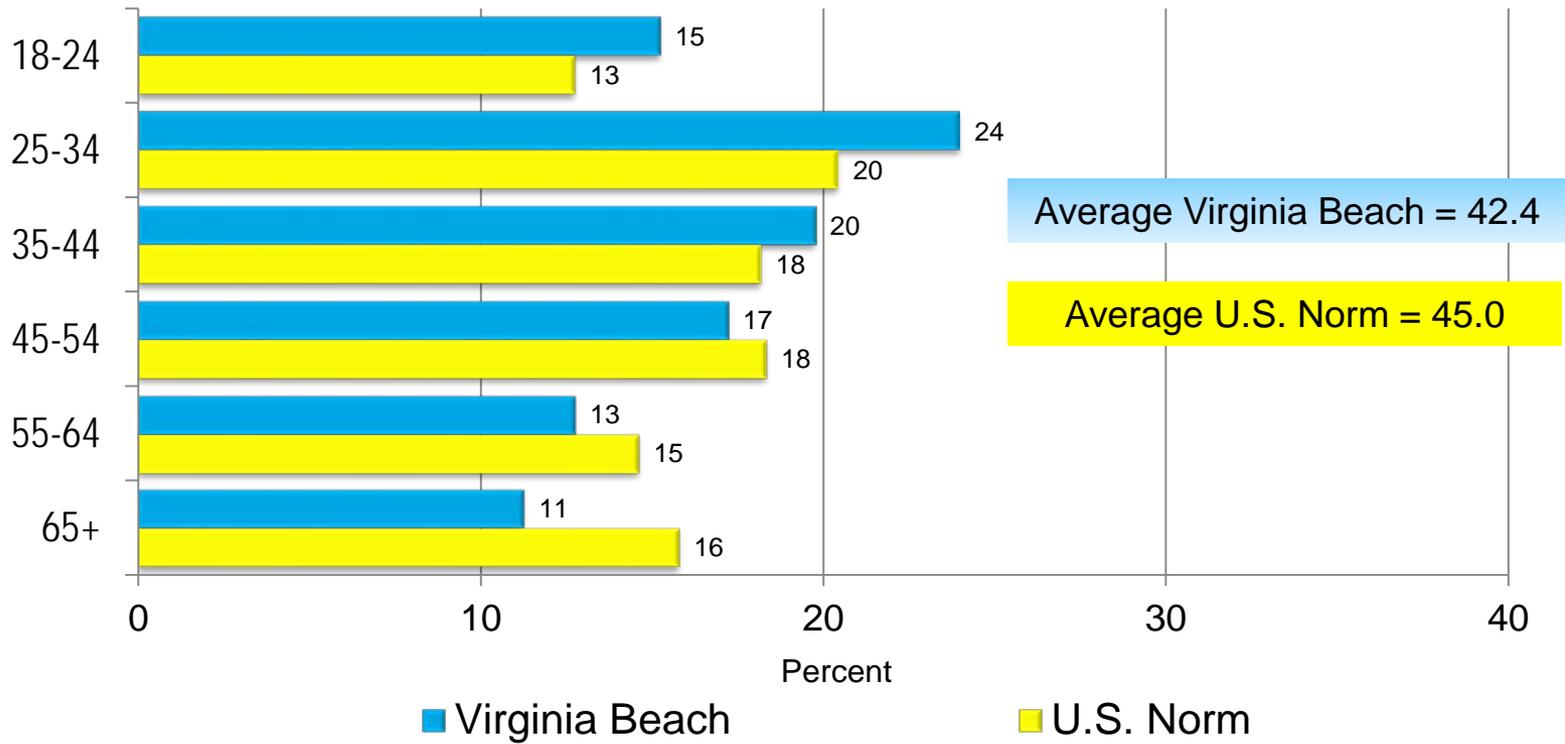


# Gender

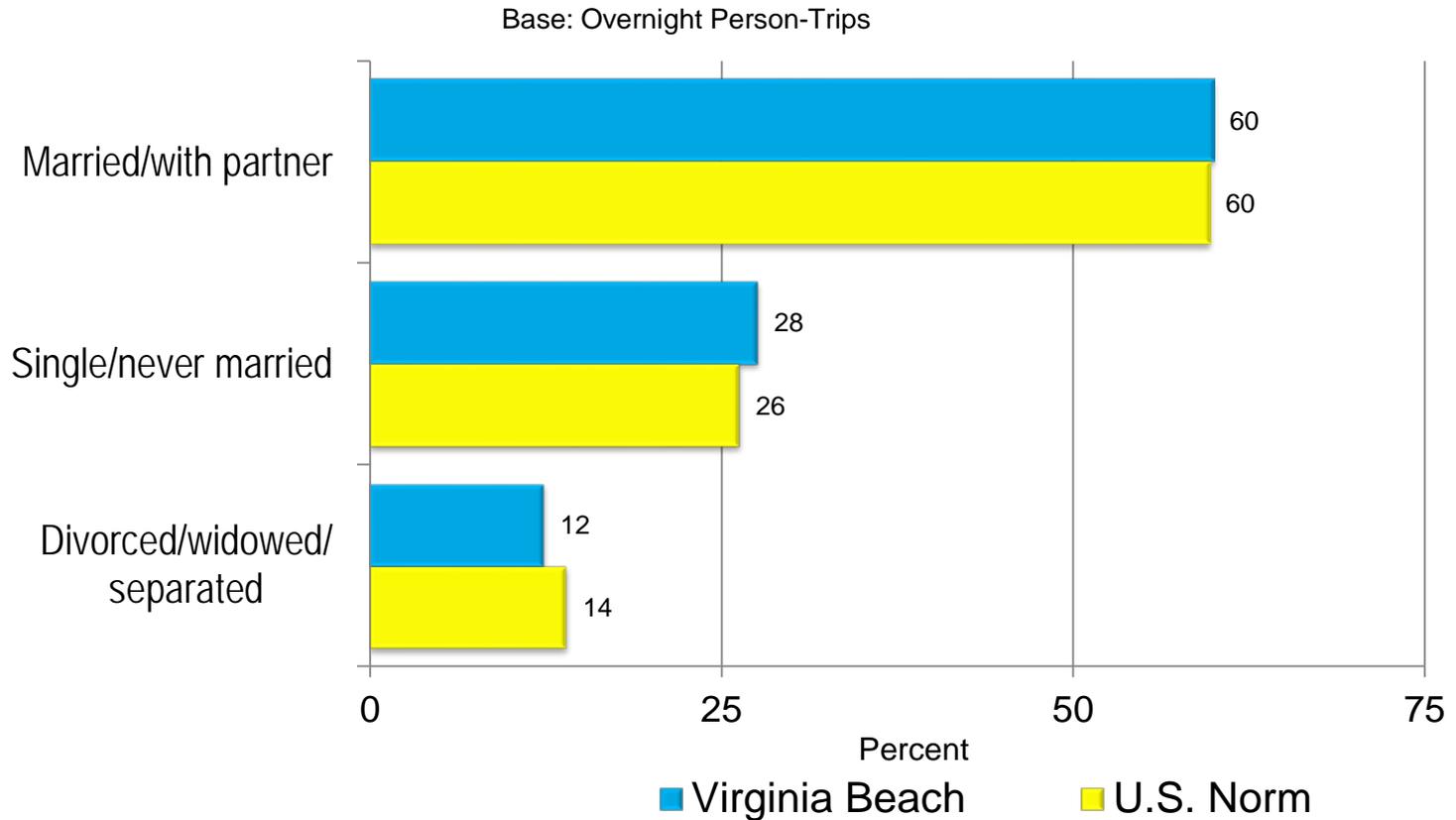


# Age

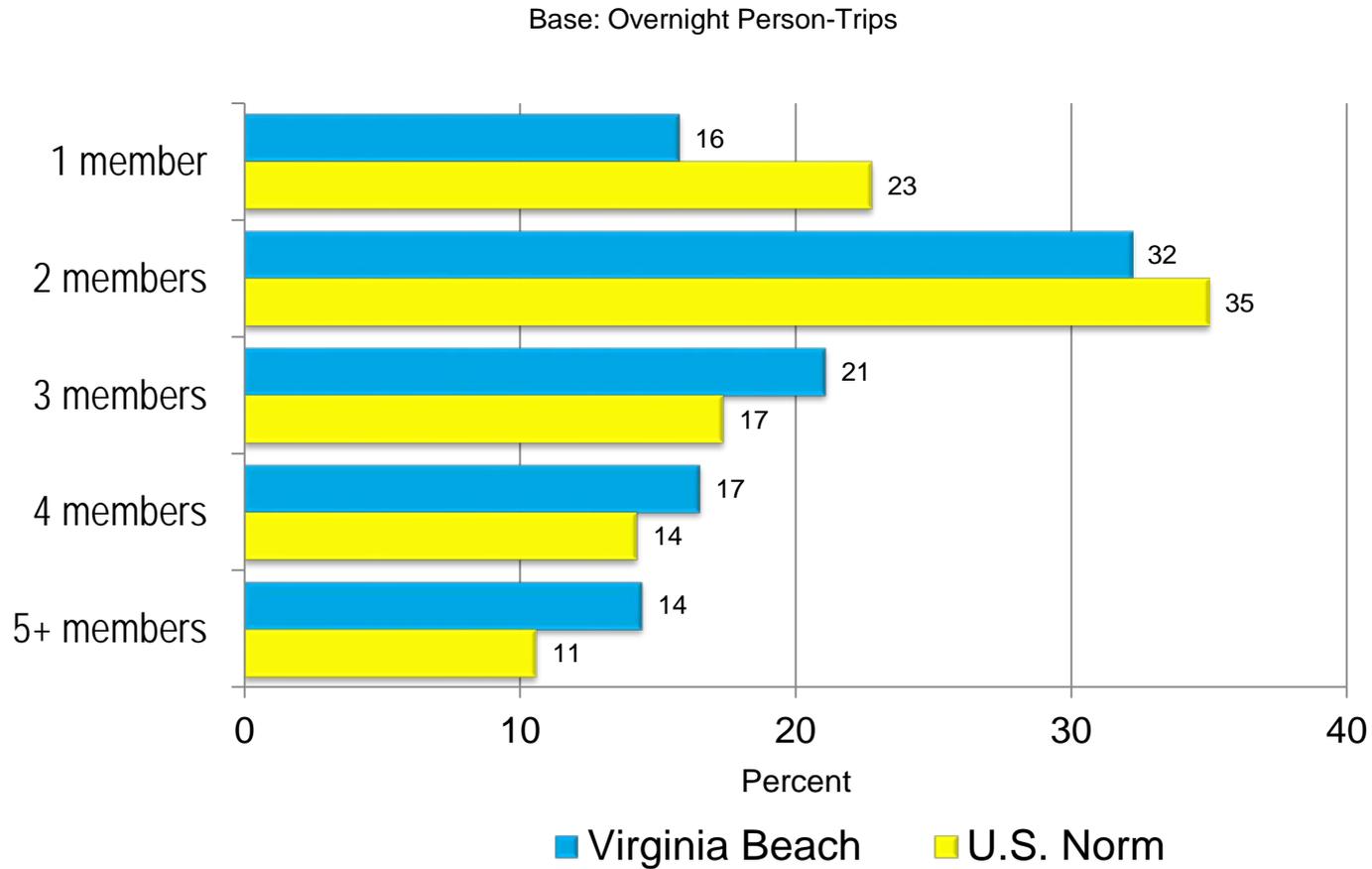
Base: Overnight Person-Trips



# Marital Status

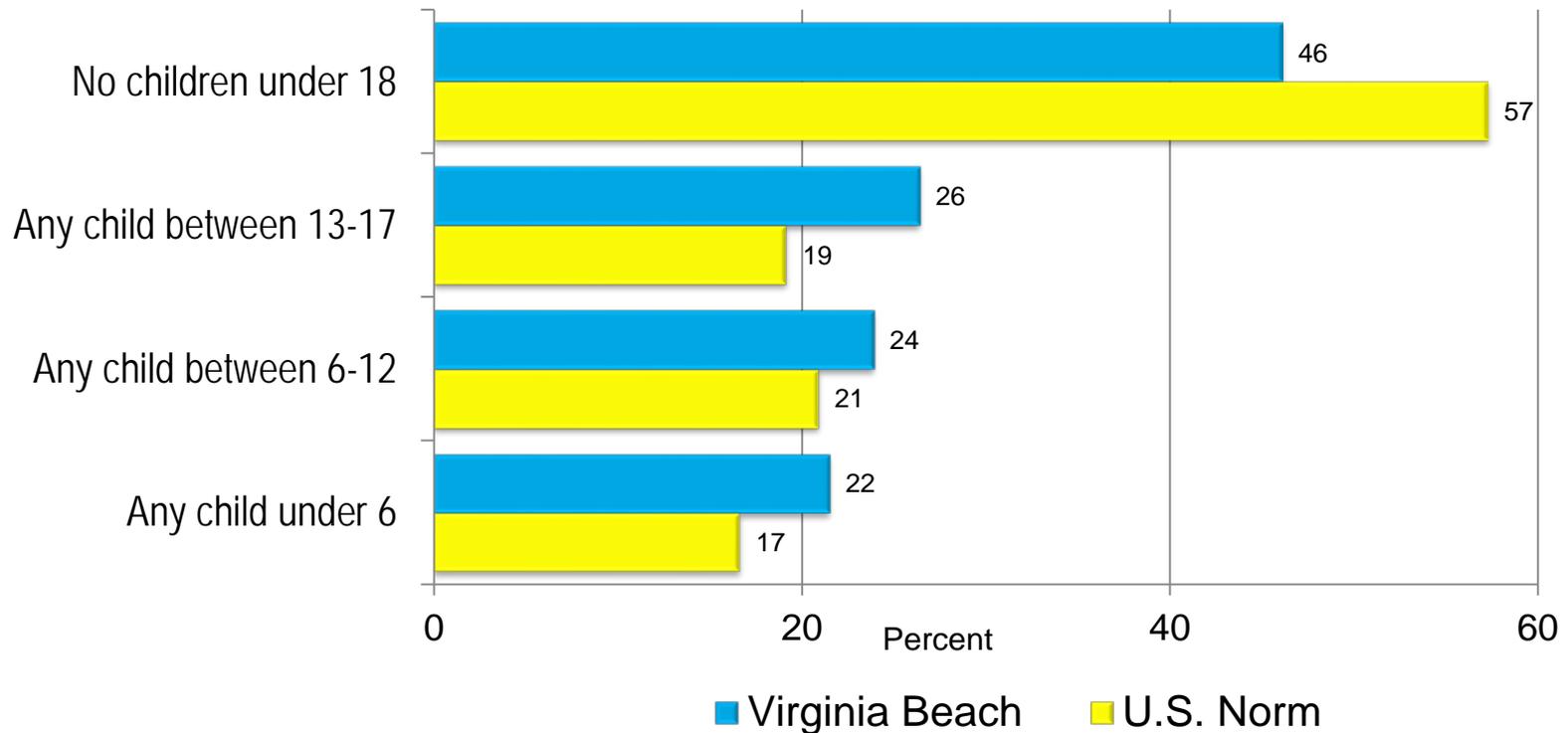


# Household Size



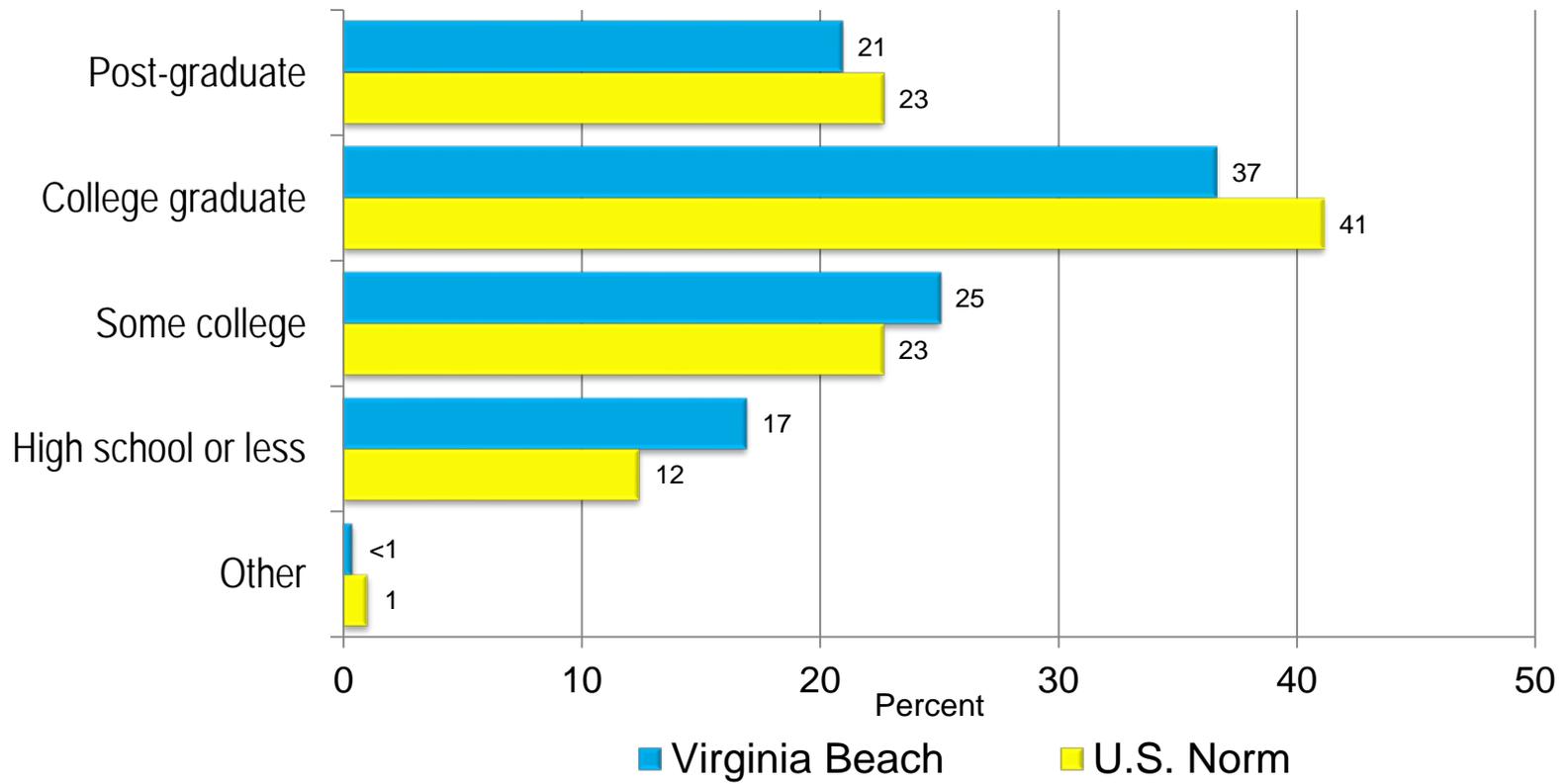
# Children in Household

Base: Overnight Person-Trips



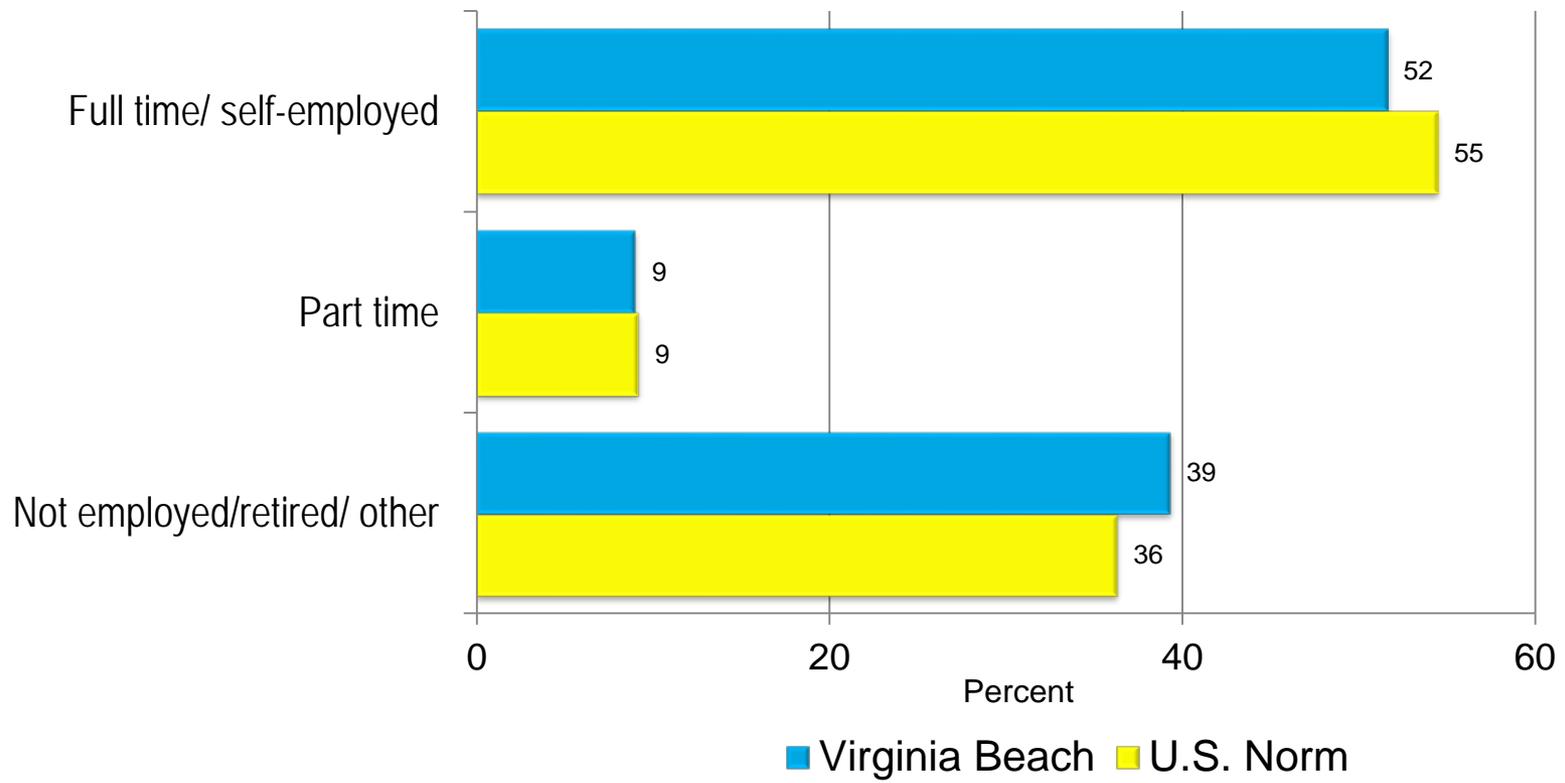
# Education

Base: Overnight Person-Trips



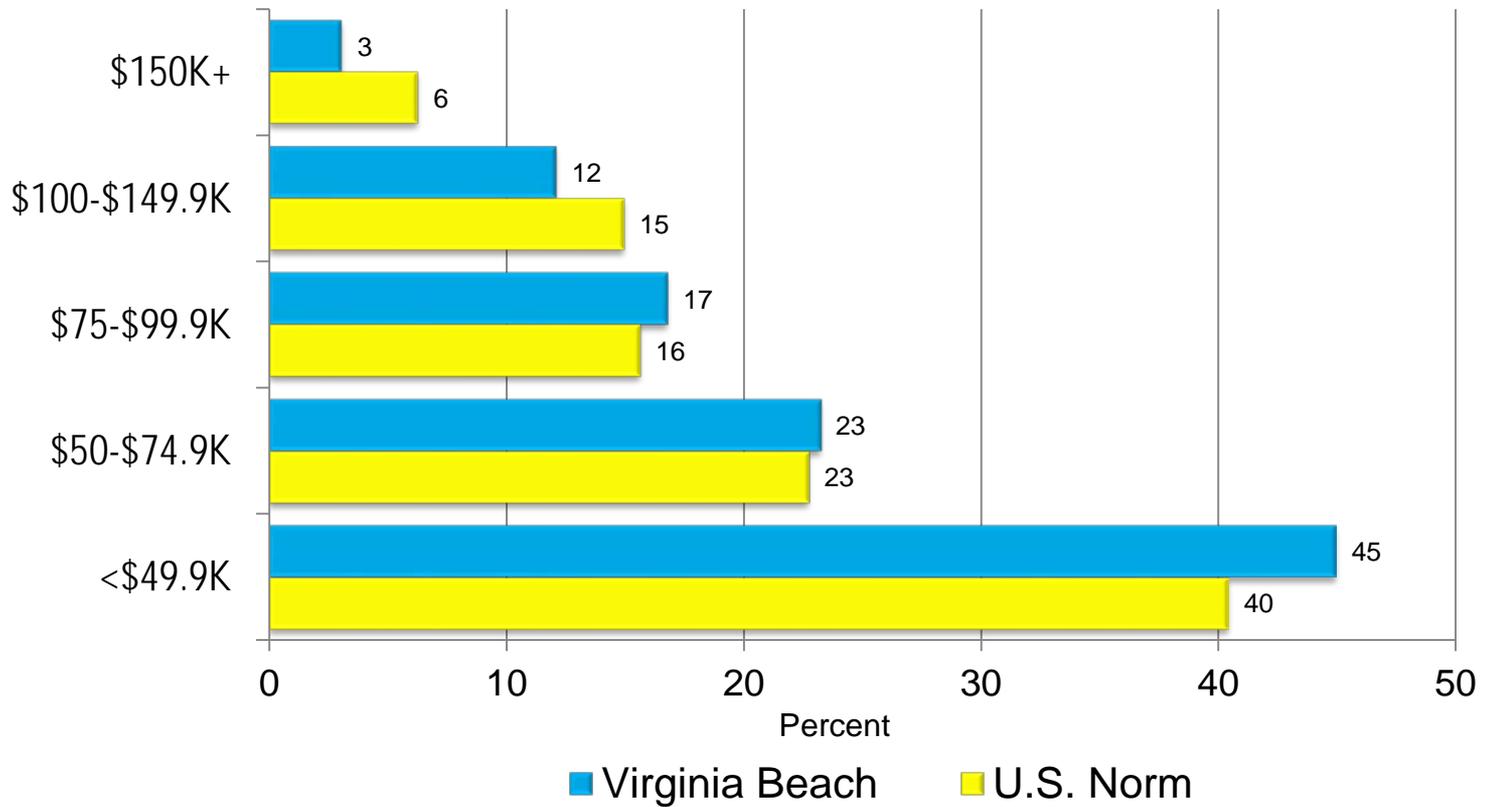
# Employment

Base: Overnight Person-Trips

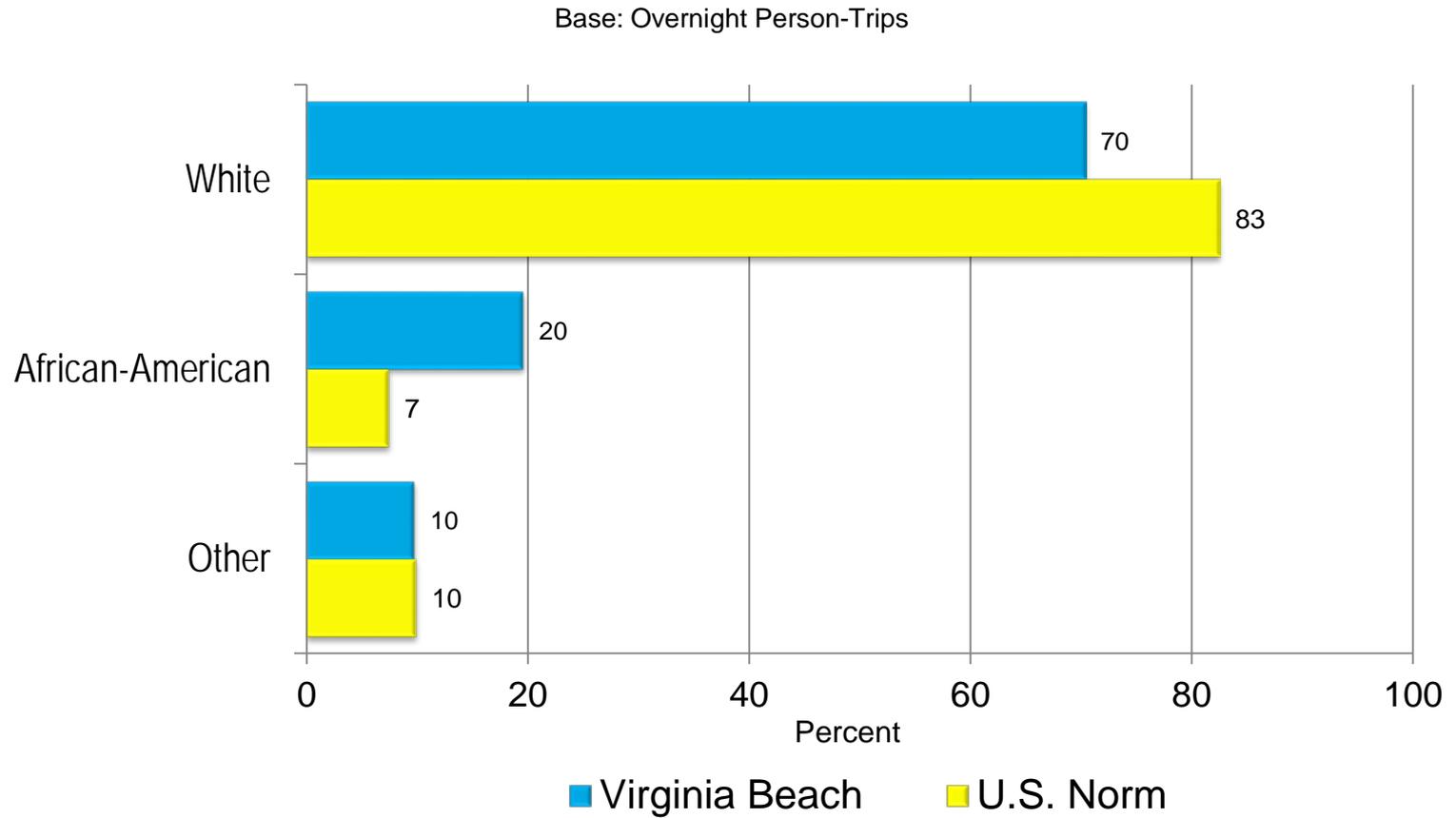


# Household Income

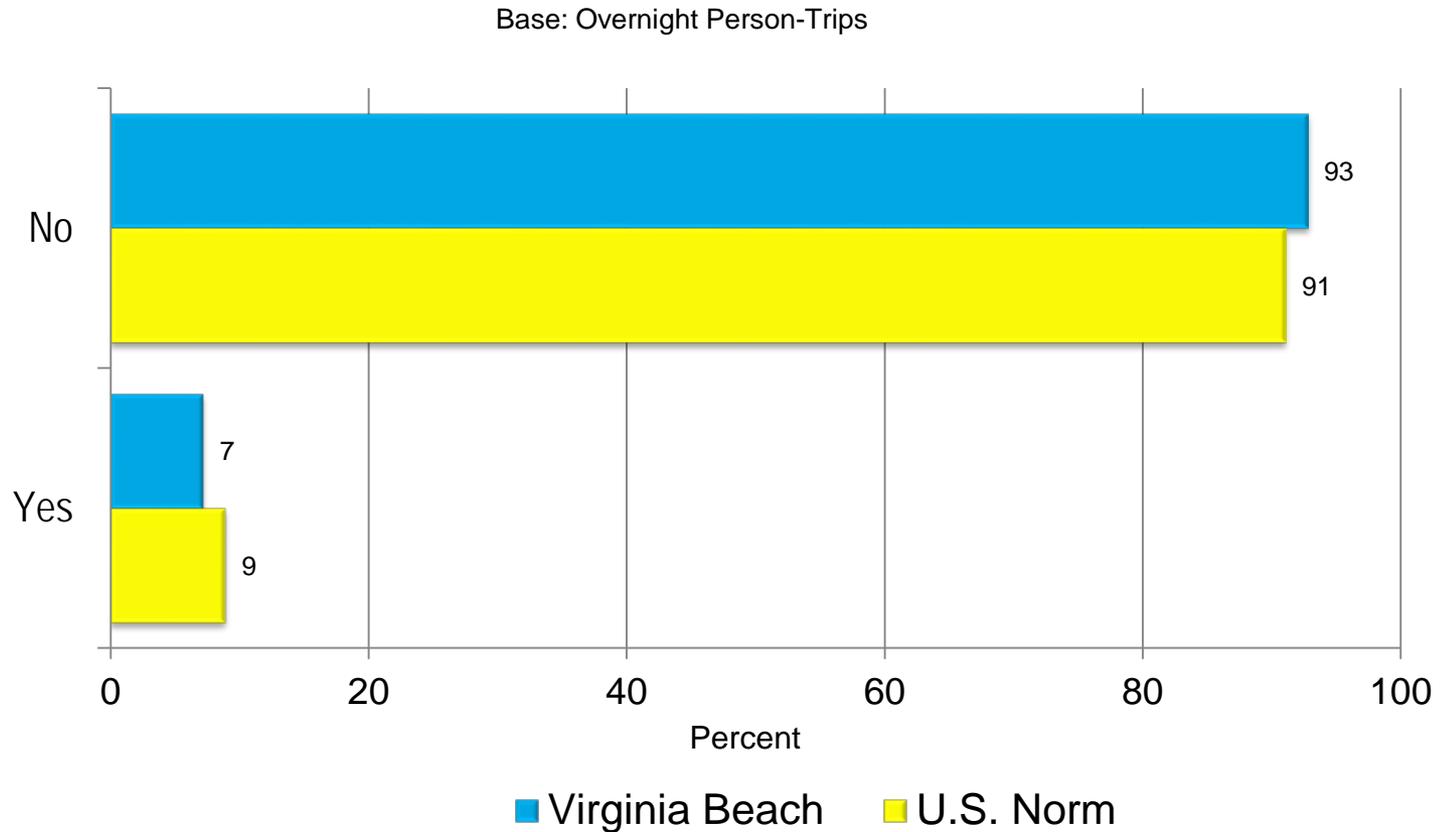
Base: Overnight Person-Trips



# Race



# Hispanic Background



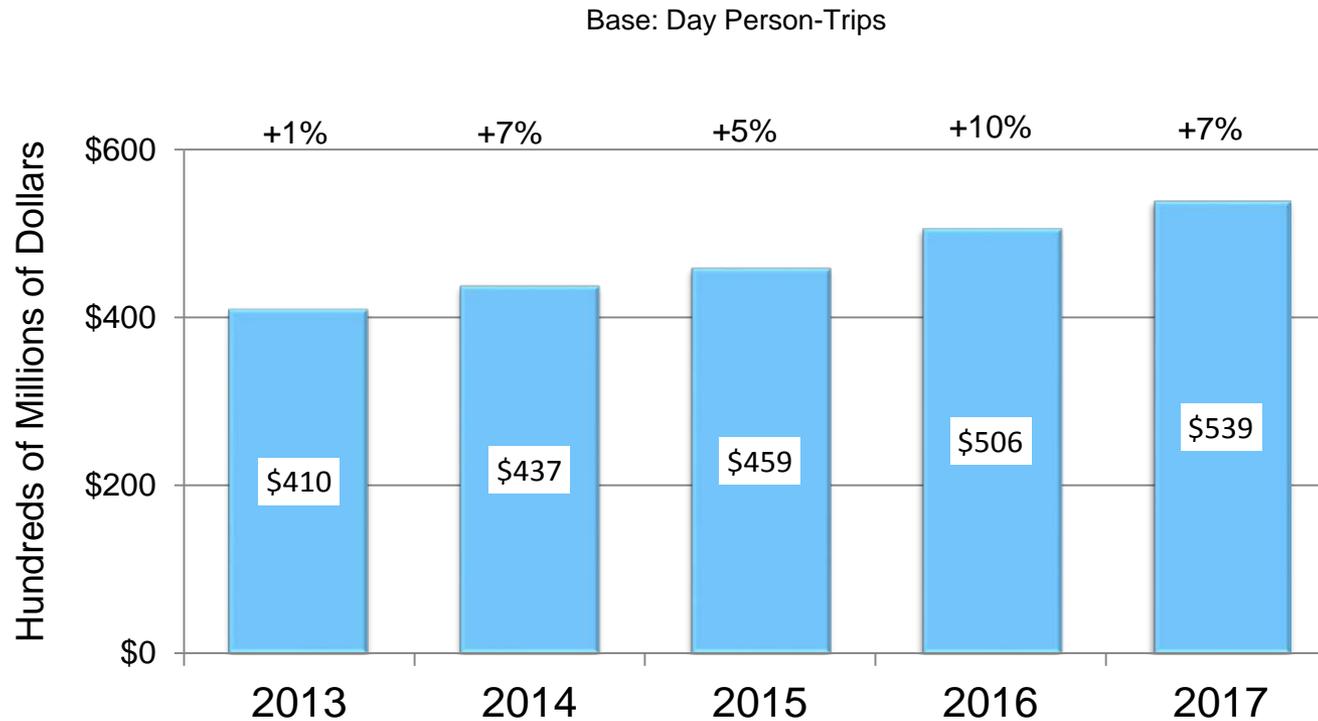


**Longwoods**  
INTERNATIONAL  
40 YEARS TOGETHER

## Day Trip Expenditures



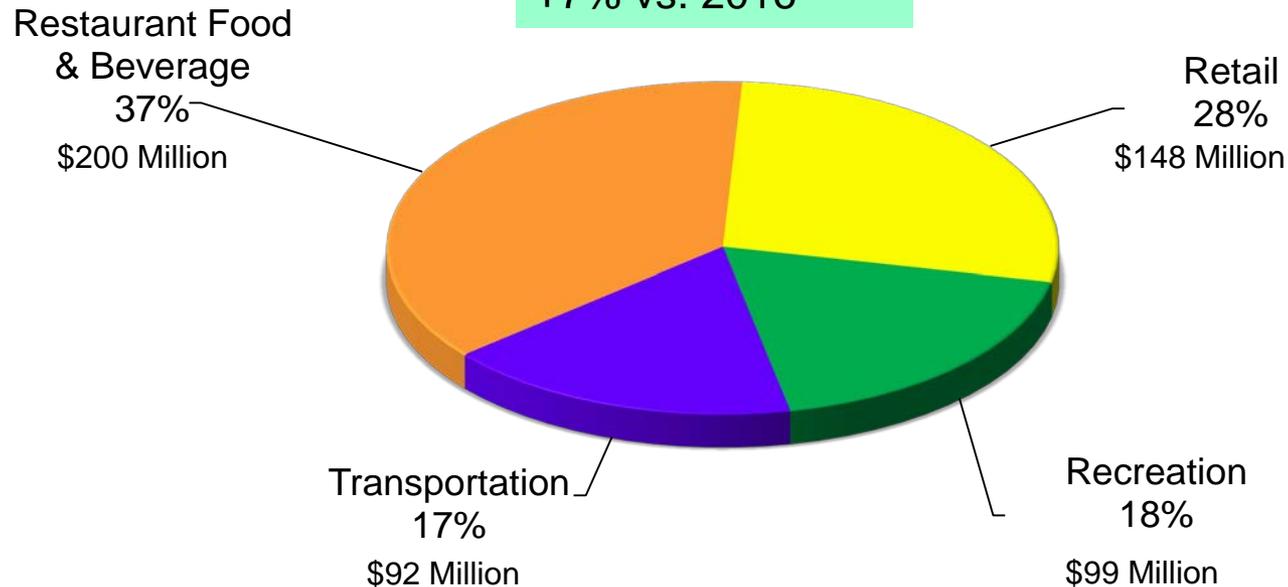
# Domestic Day Trip Expenditures



# Total Virginia Beach Domestic Day Trip Spending — by Sector

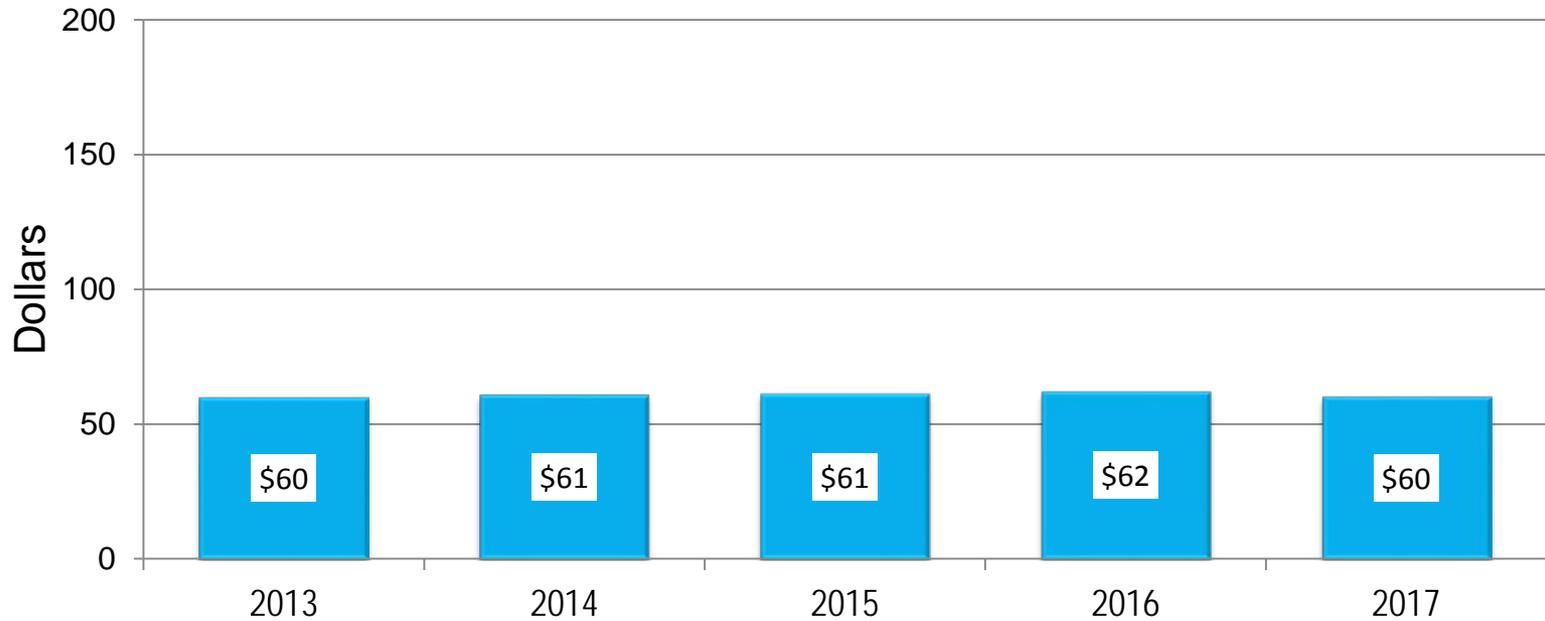
Total Spending = \$539 Million

+7% vs. 2016

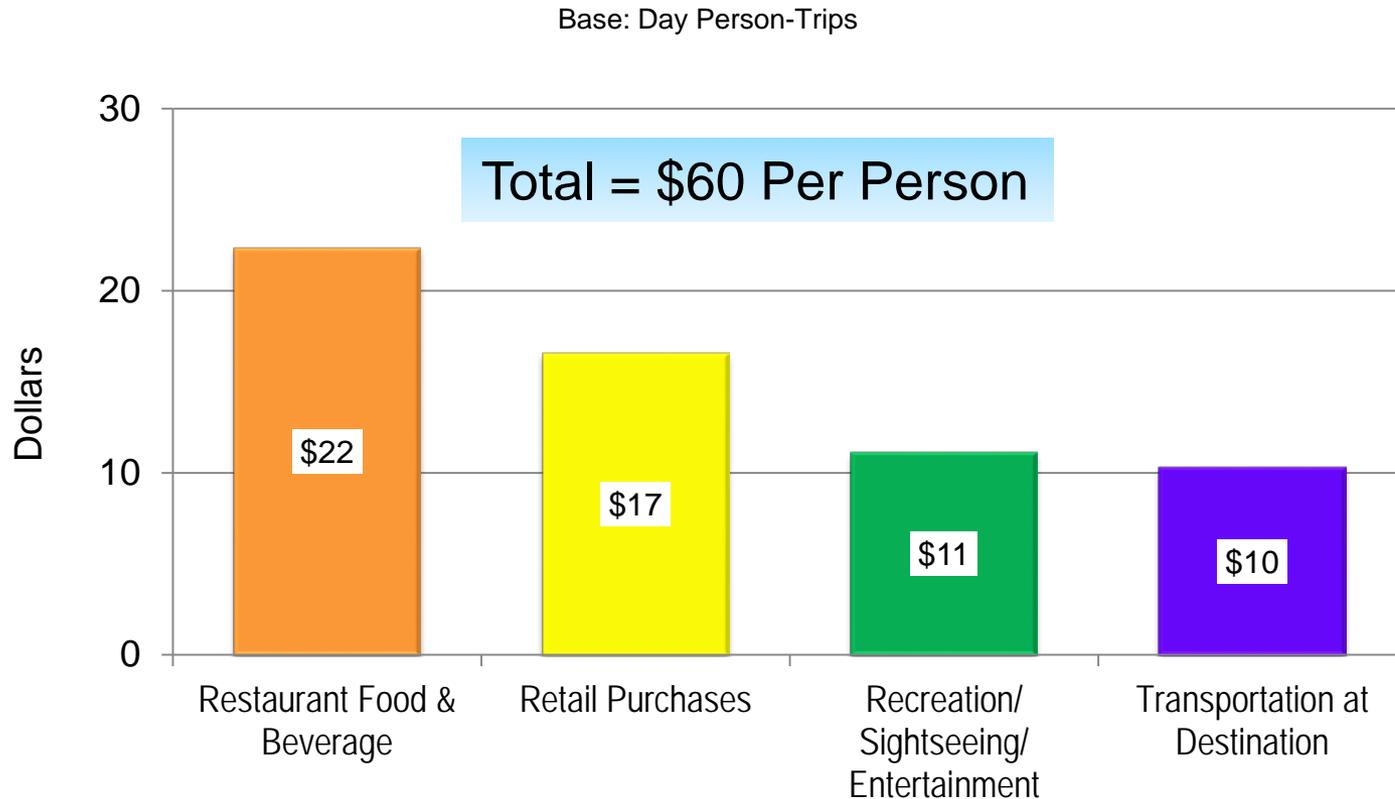


# Average Per Person Expenditures on Day Trips

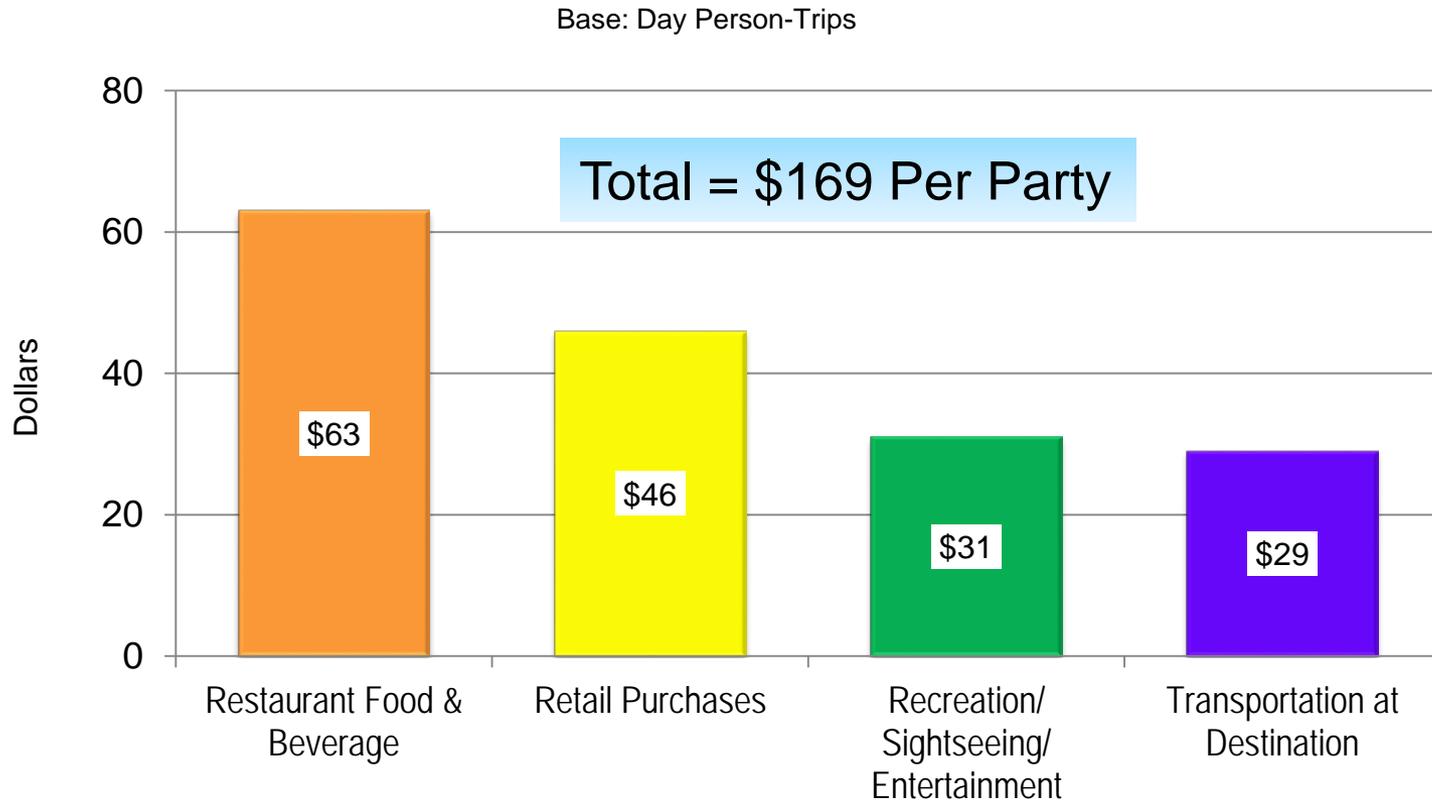
Base: Overnight Person-Trips



# Average Per Person Expenditures on Day Trips — By Sector



# Average Per Party Expenditures on Day Trips — By Sector



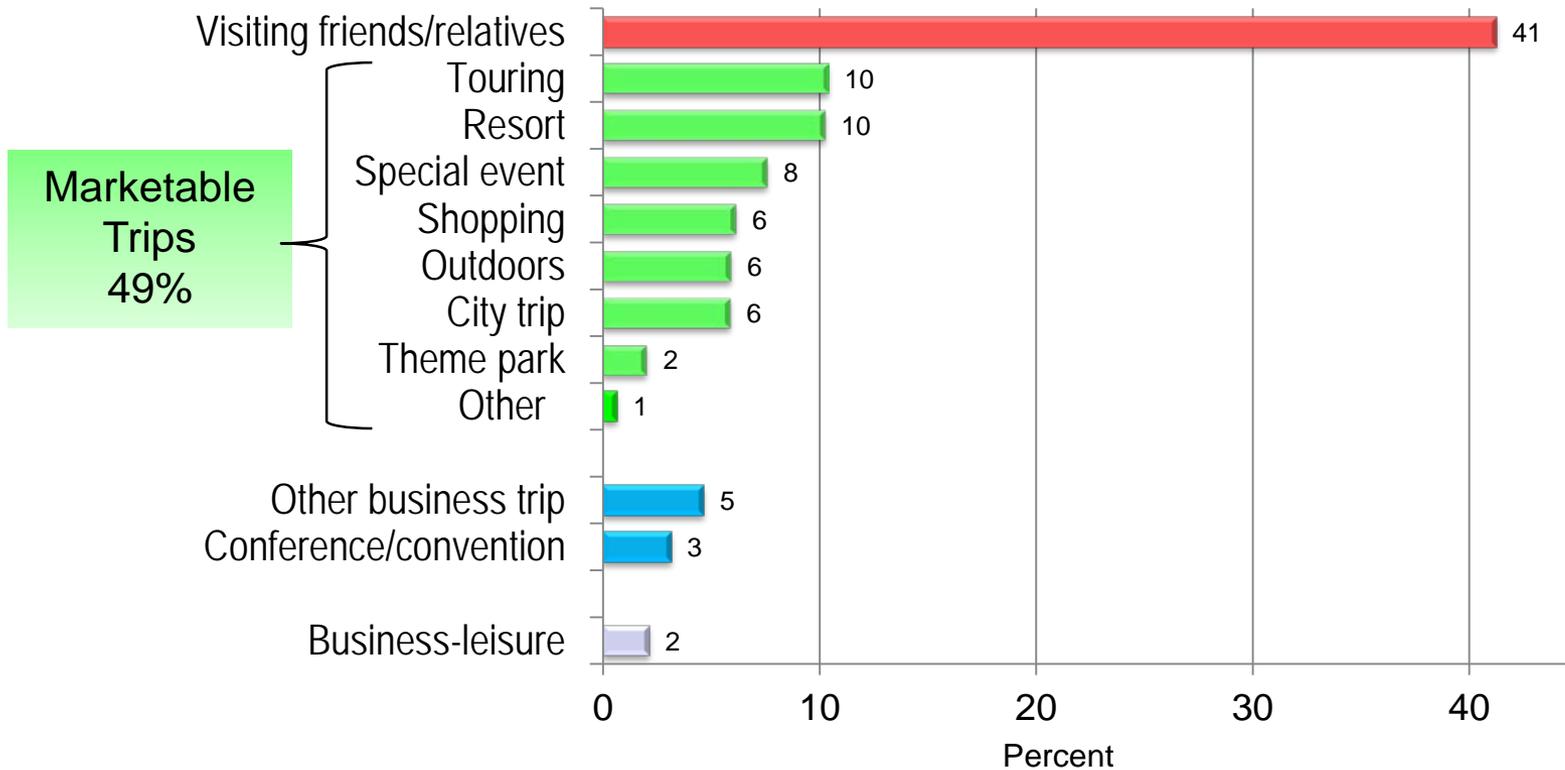


## Day Trip Characteristics

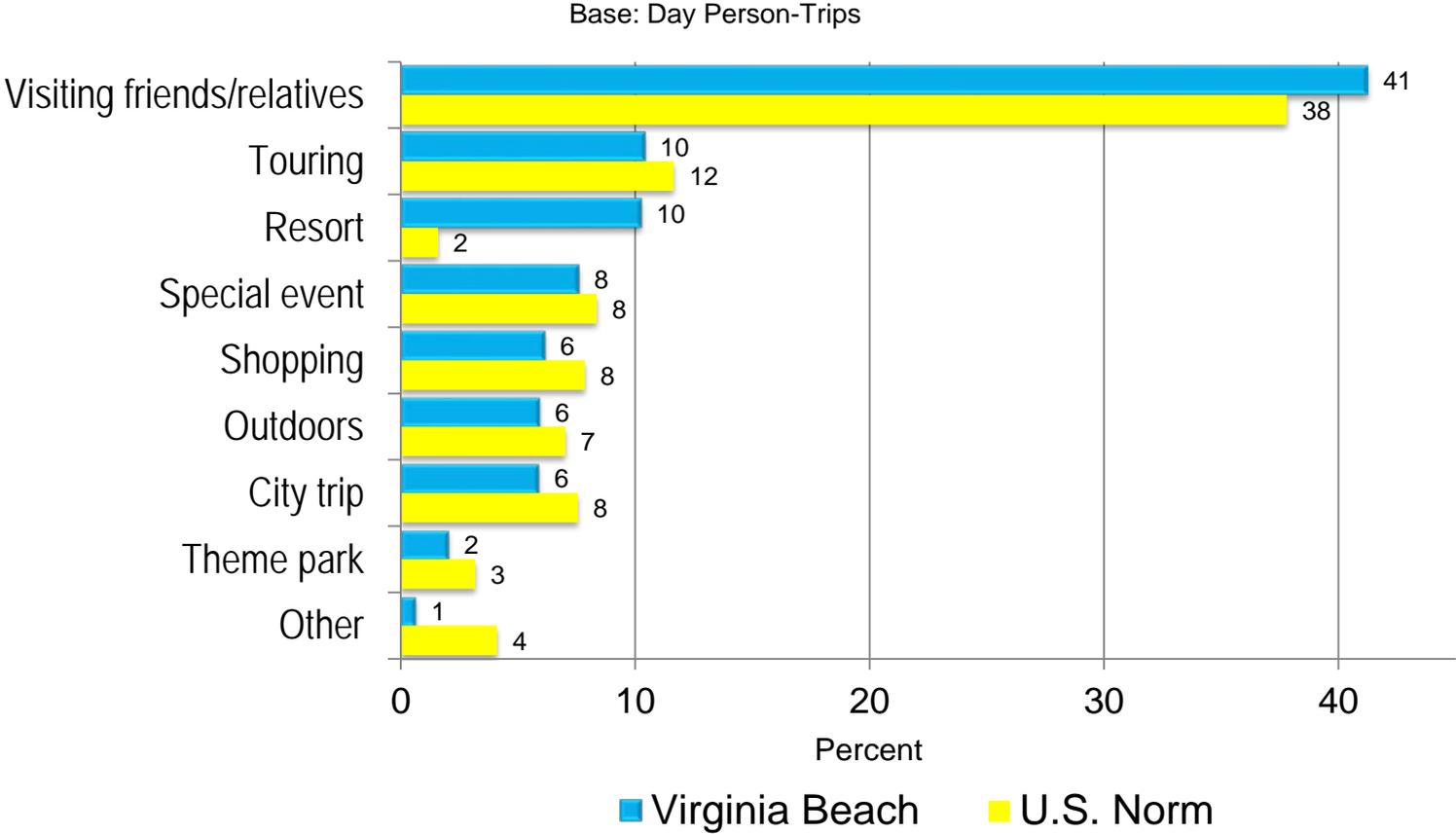


# Main Purpose of Trip

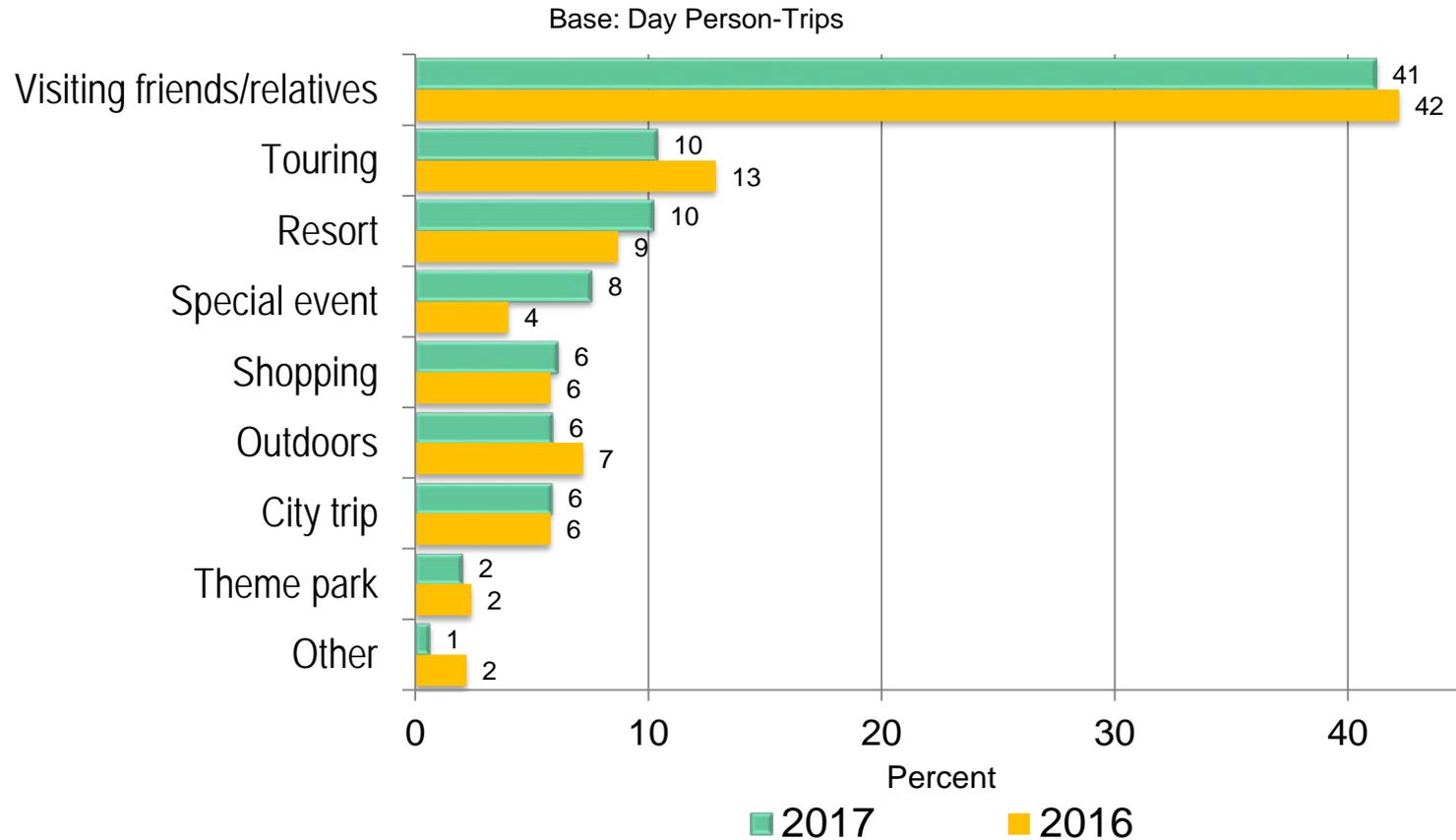
Base: Day Person-Trips



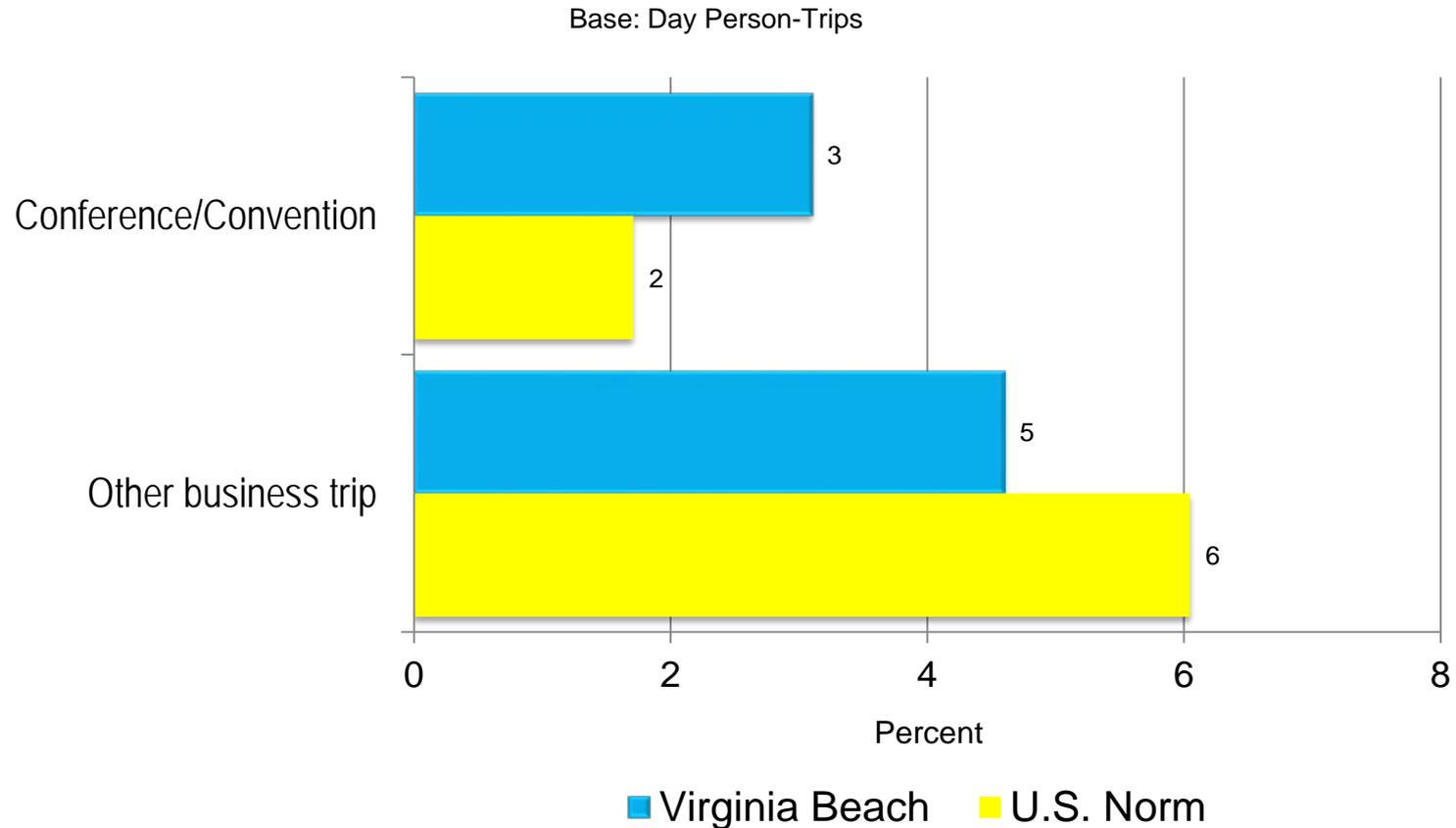
# Main Purpose of Leisure Trip — Virginia Beach vs. National Norm



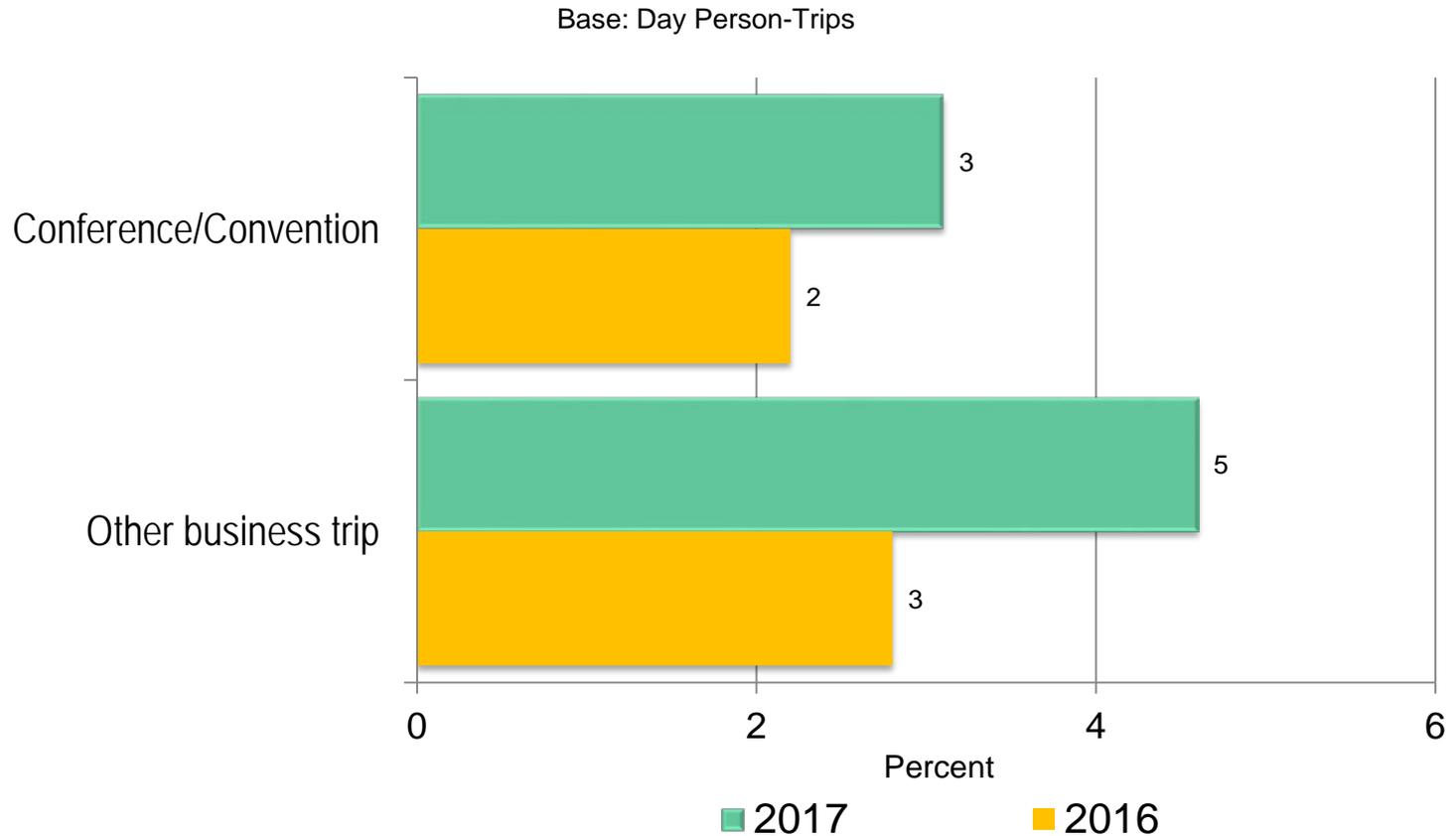
# Main Purpose of Day Leisure Trip — 2017 vs. 2016



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

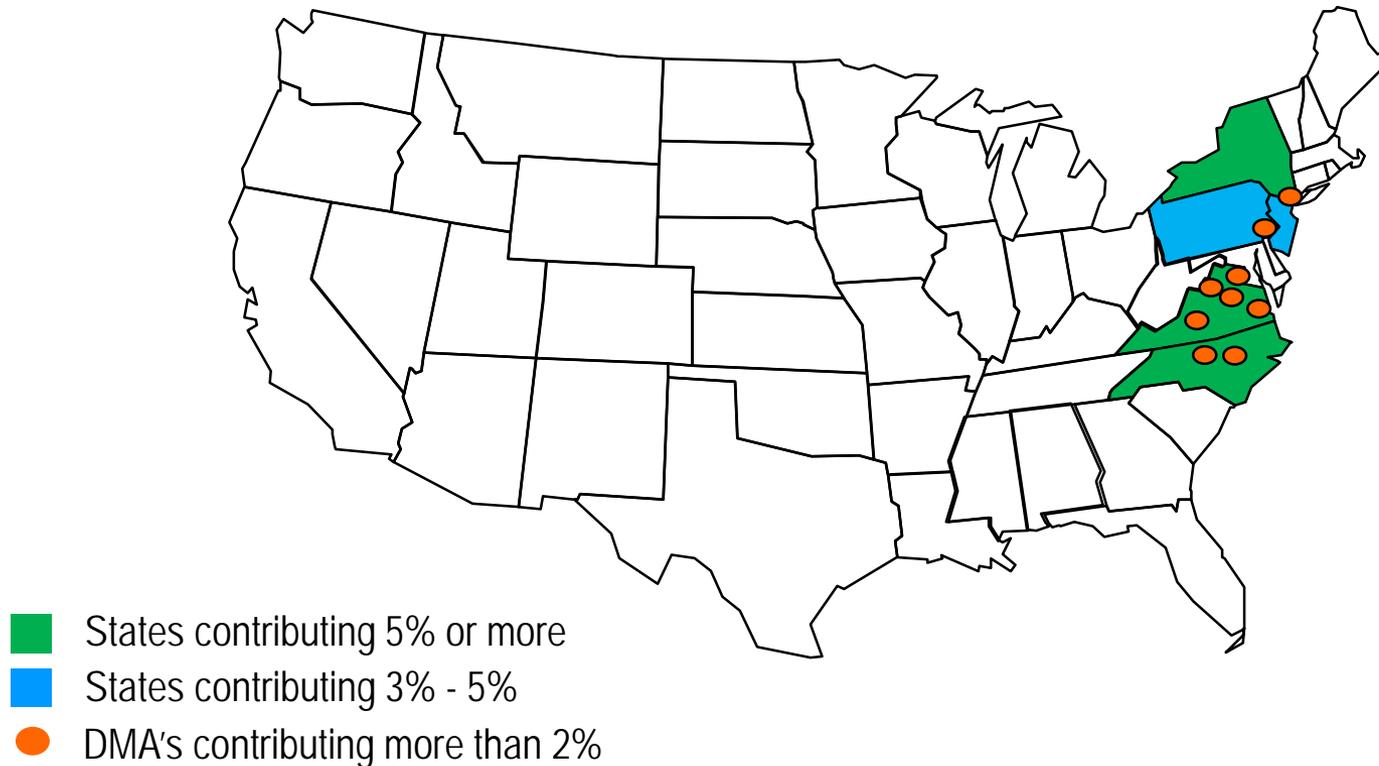


# Main Purpose of Day Business Trip — 2017 vs. 2016

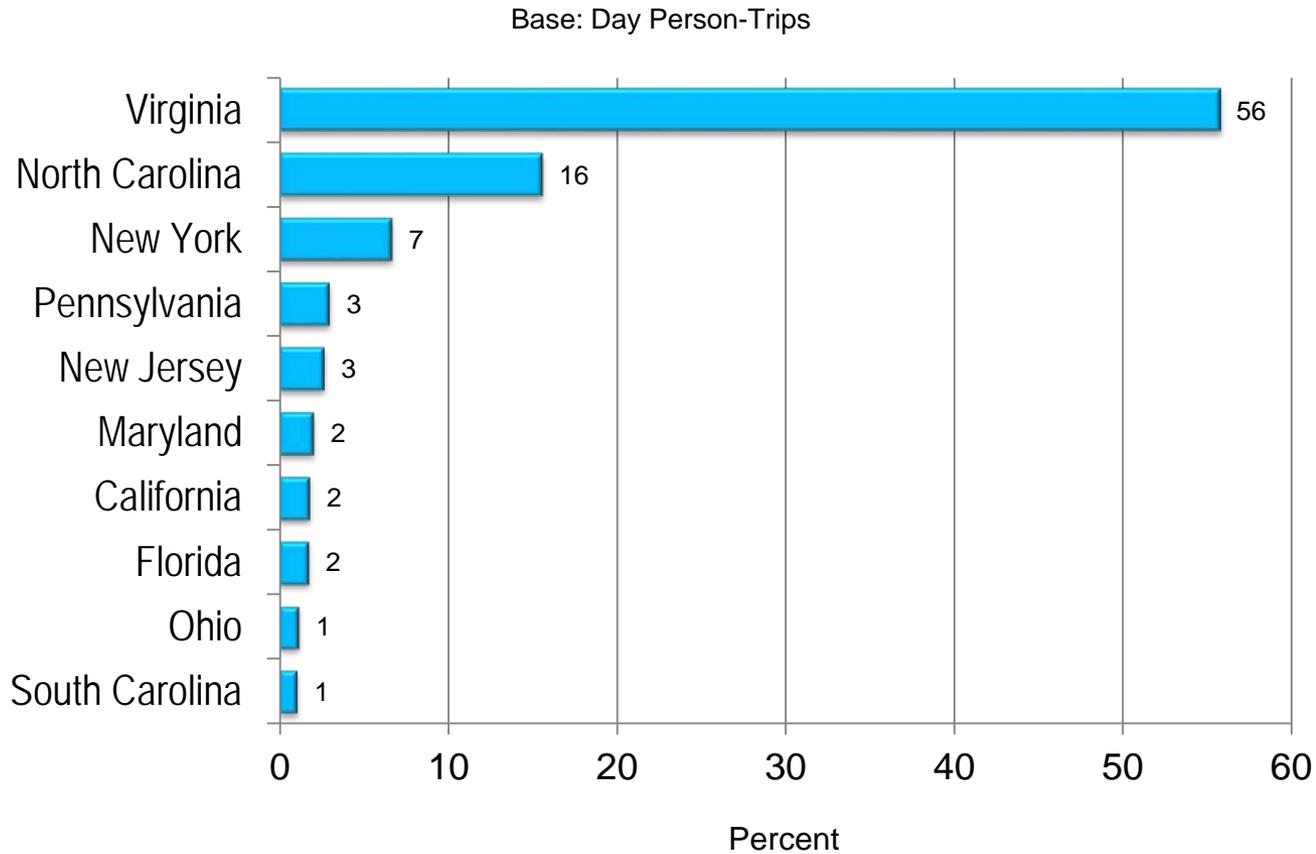


# Sources of Business

Base: Day Person-Trips

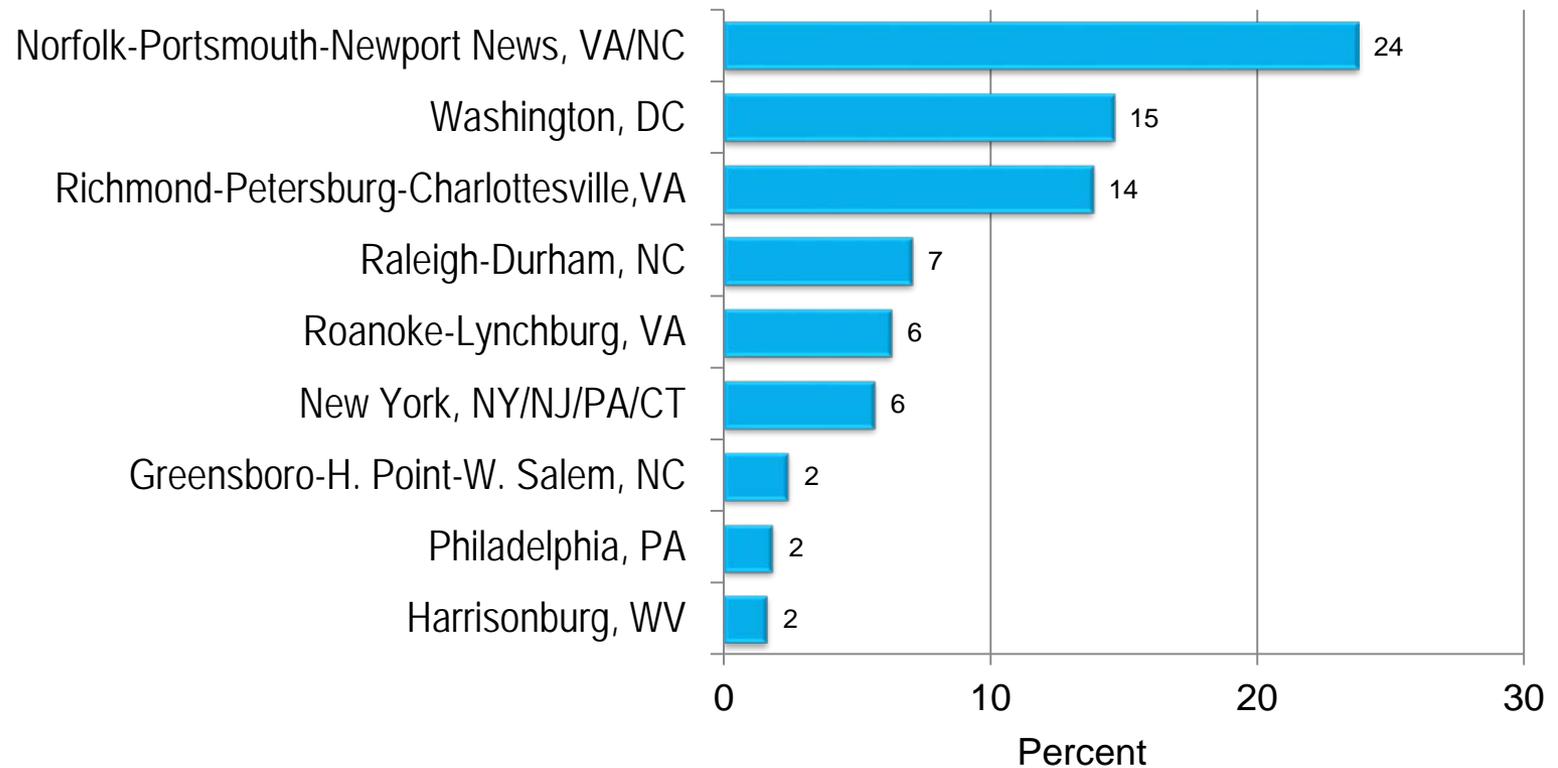


# State Origin Of Trip

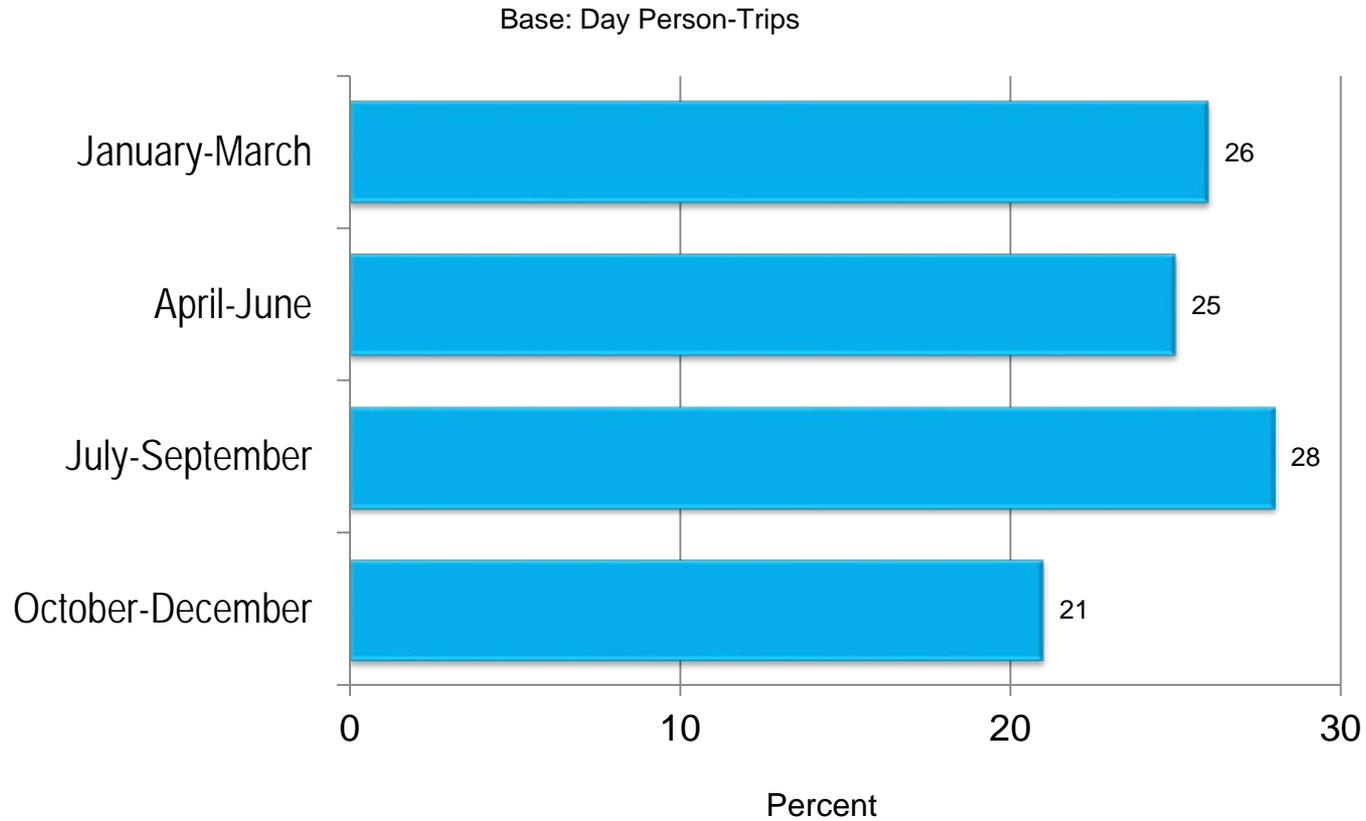


# DMA Origin Of Trip

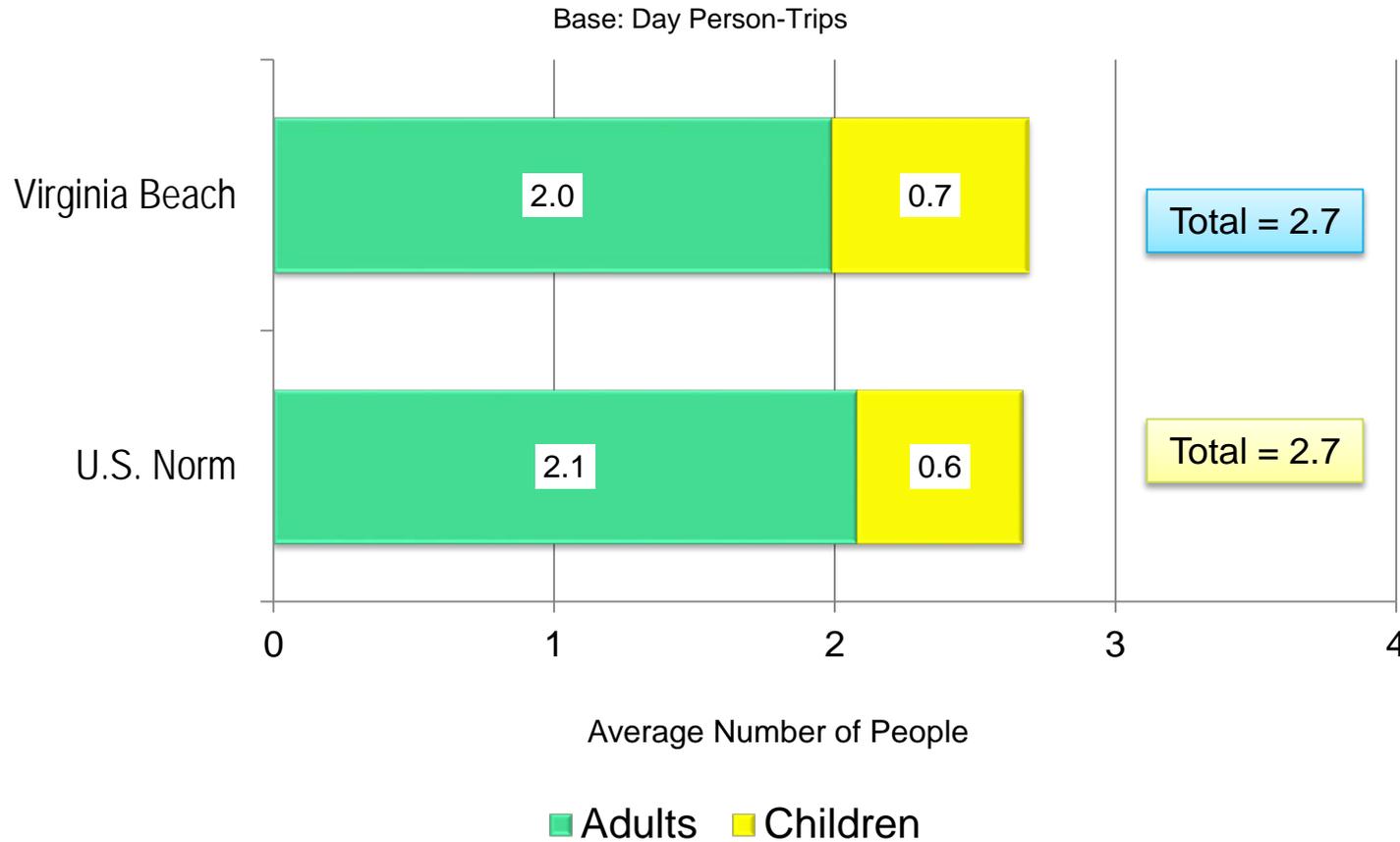
Base: Day Person-Trips



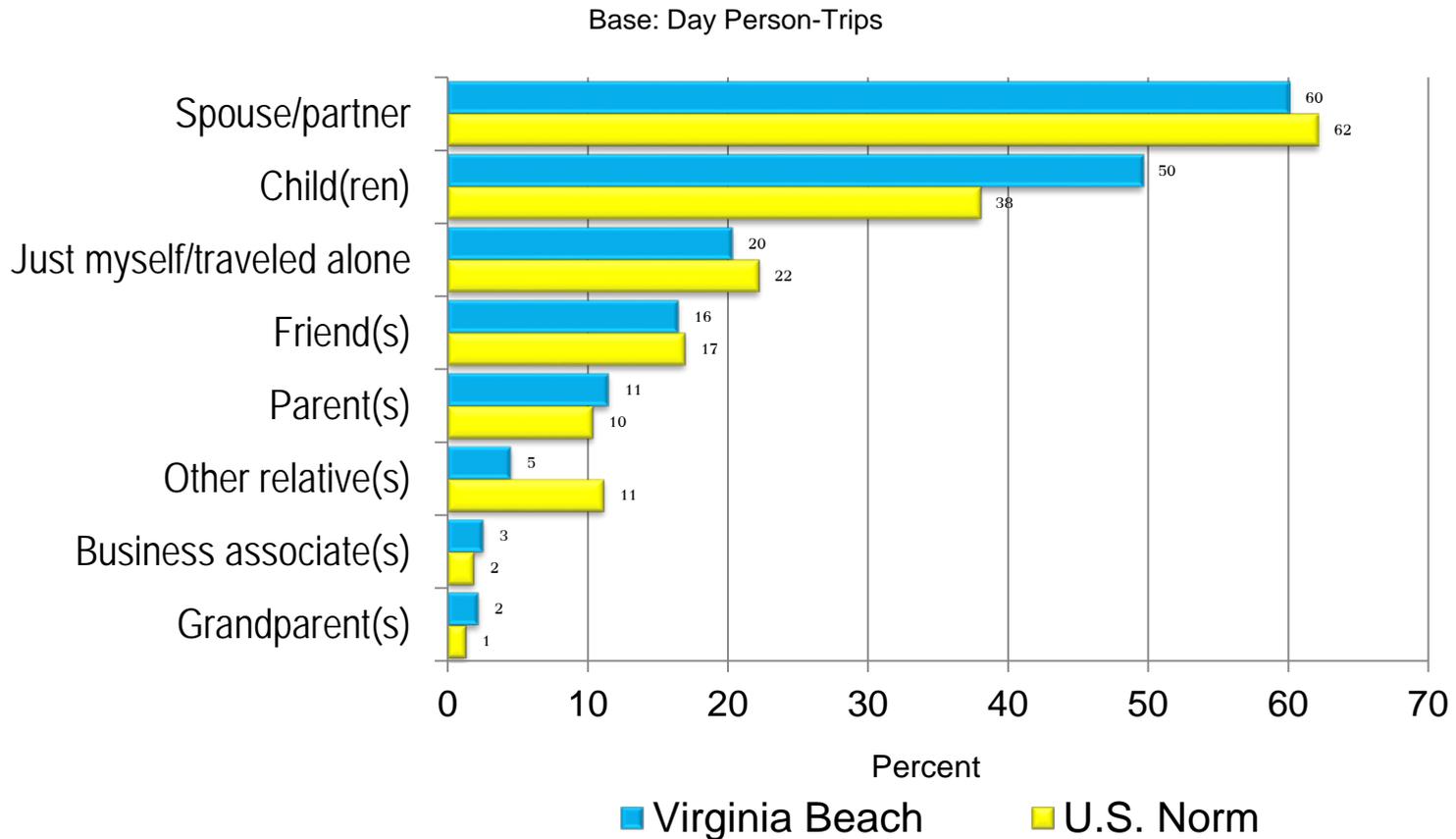
# Season of Trip



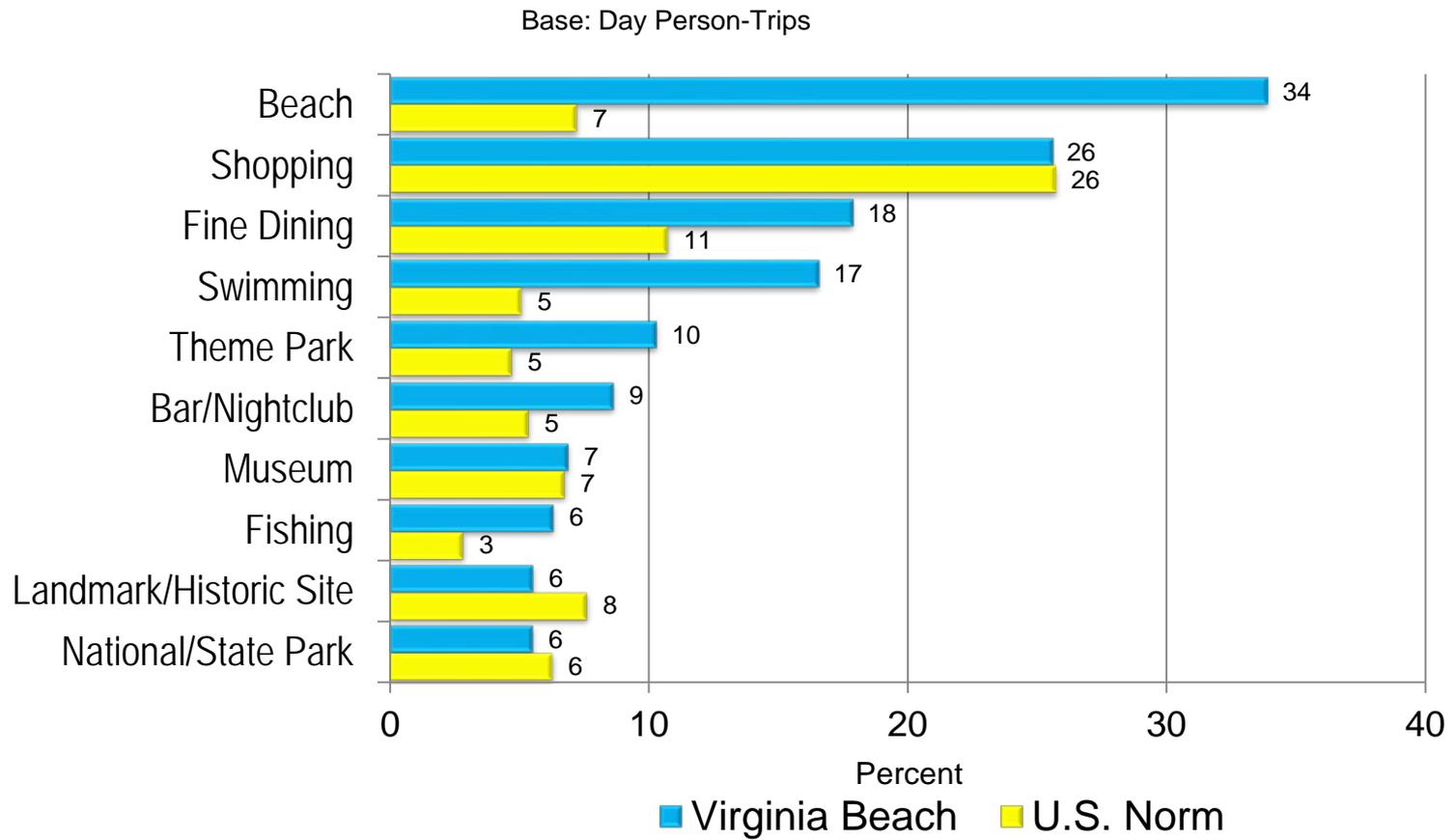
# Size of Travel Party



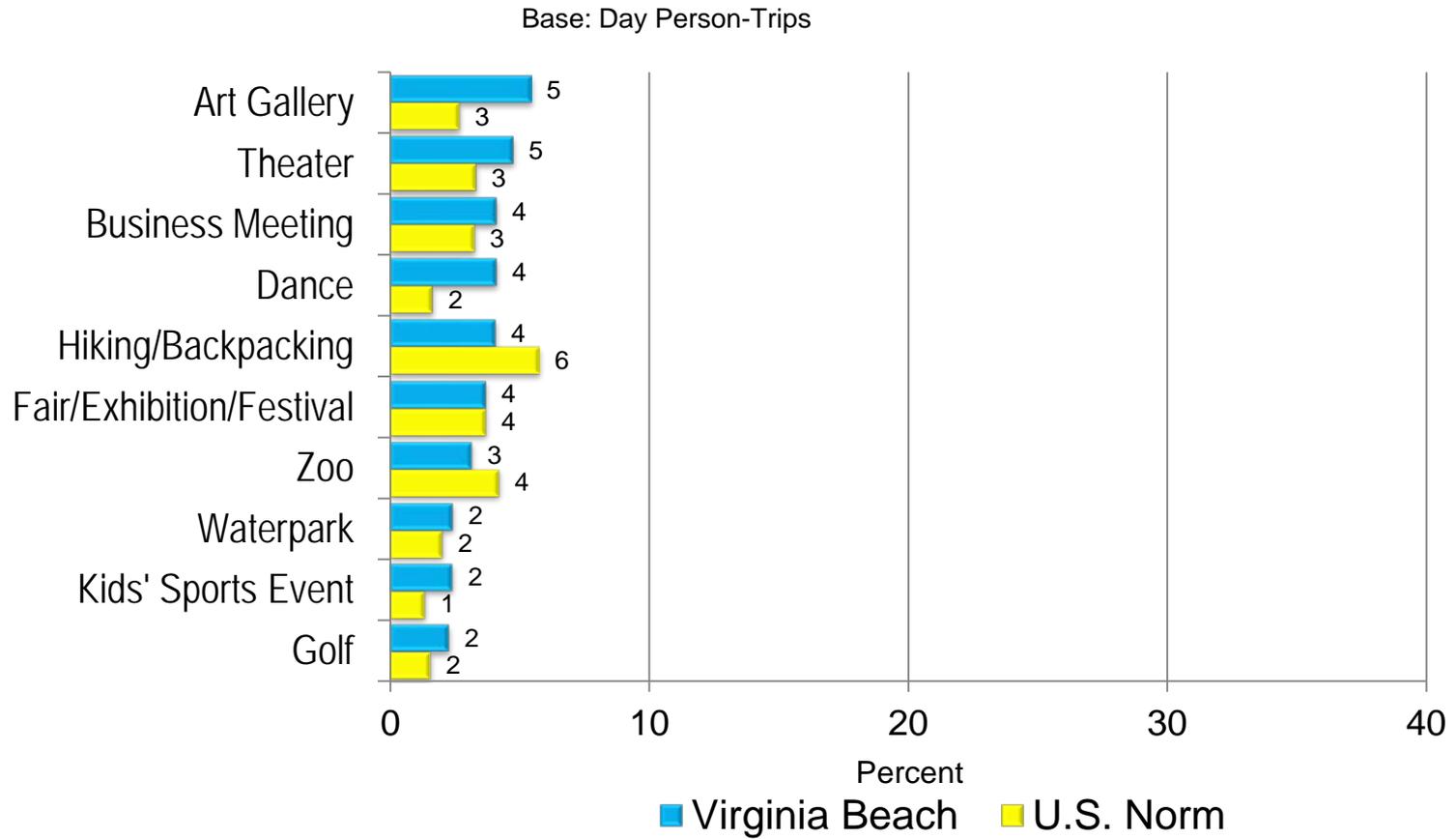
# Composition of Immediate Travel Party



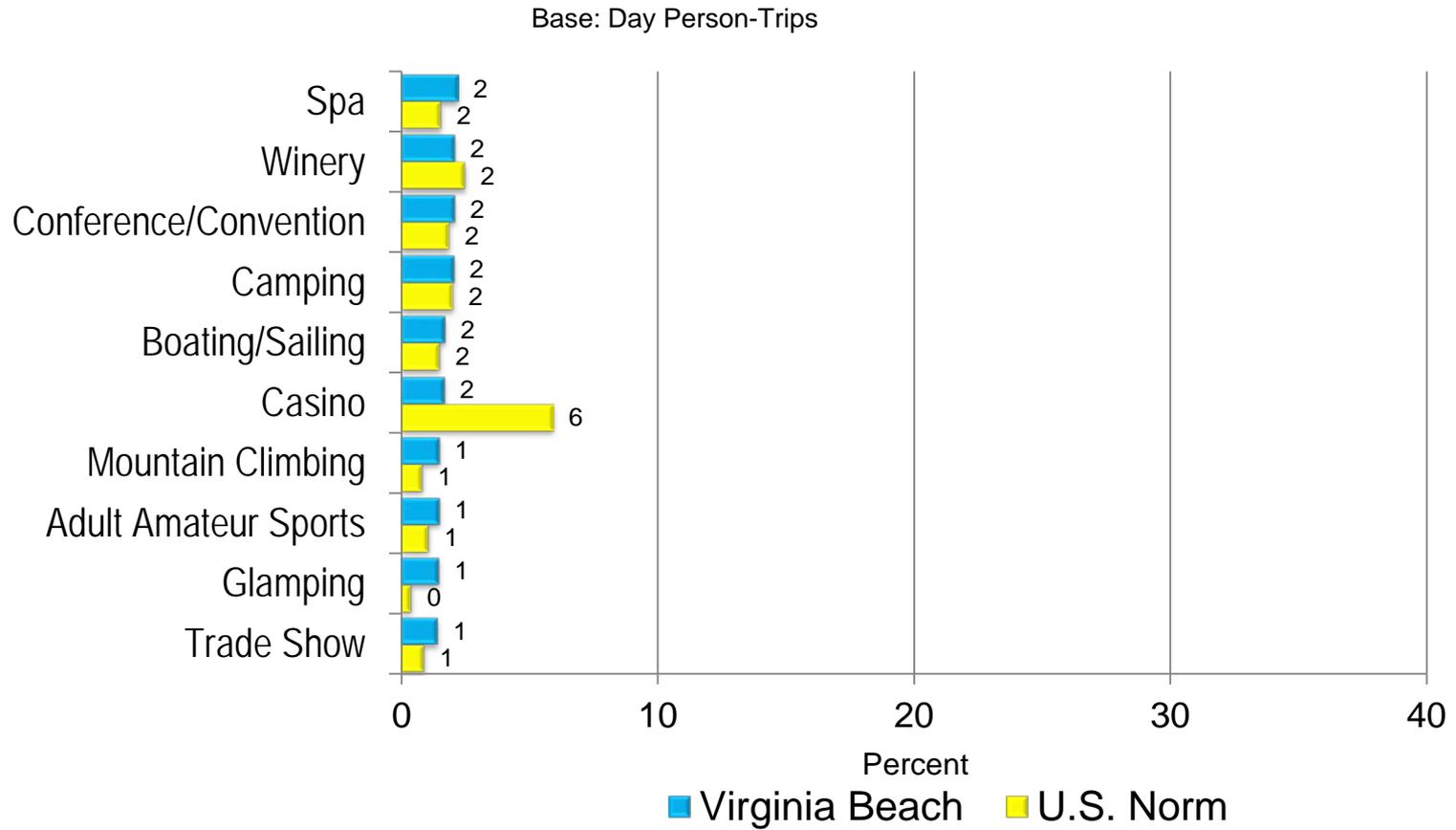
# Activities and Experiences



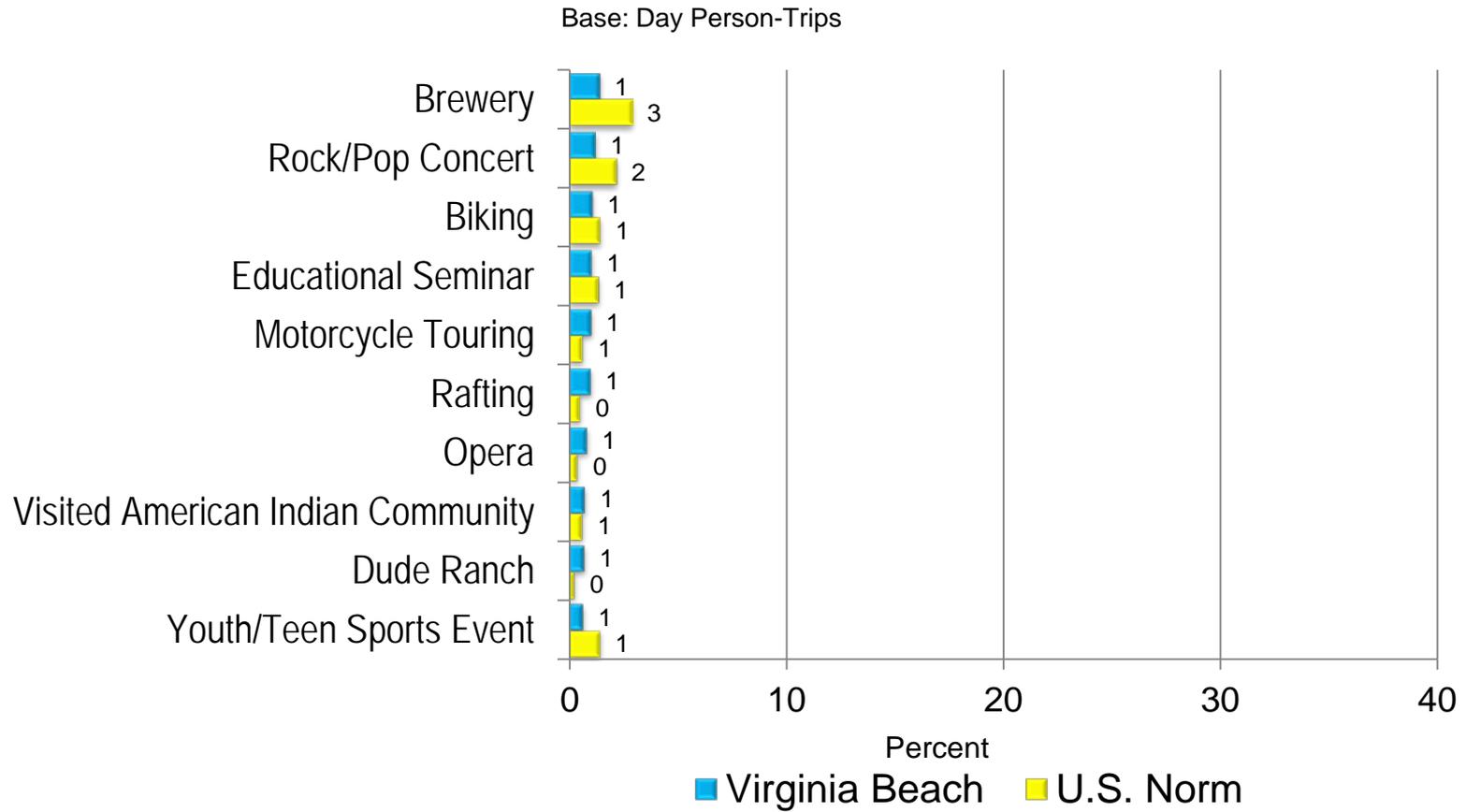
# Activities and Experiences (Cont'd)



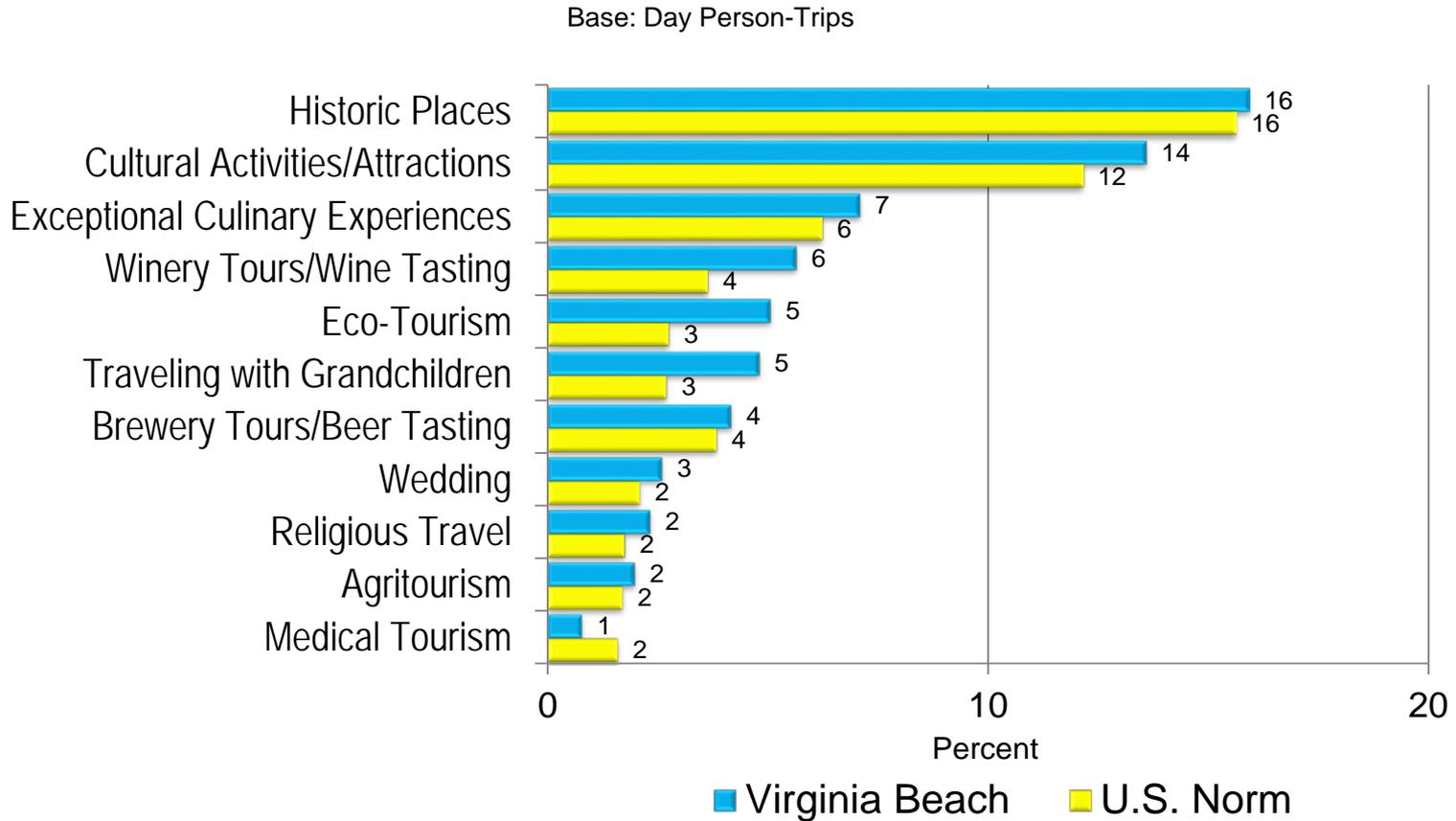
# Activities and Experiences (Cont'd)



# Activities and Experiences (Cont'd)

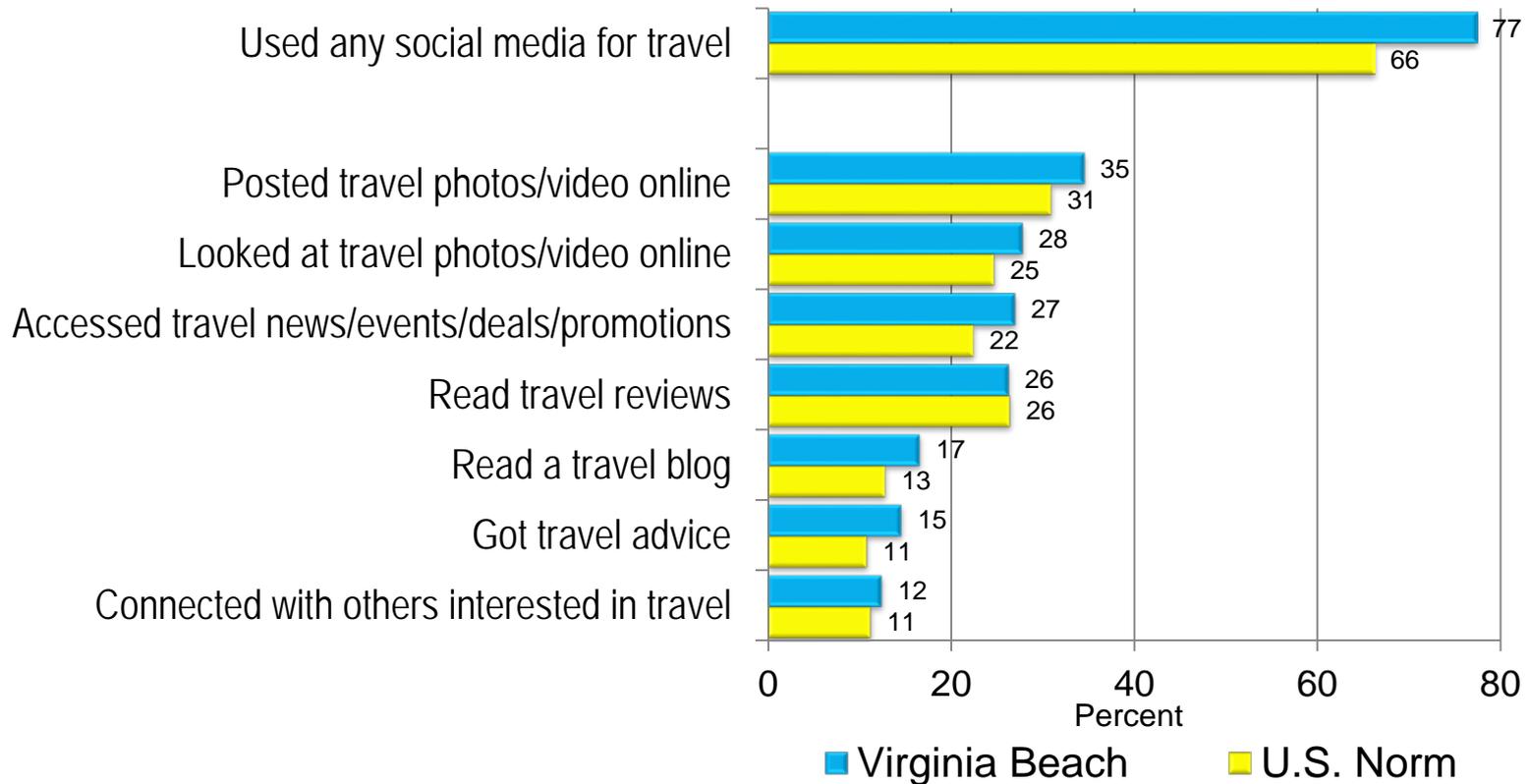


# Activities of Special Interest

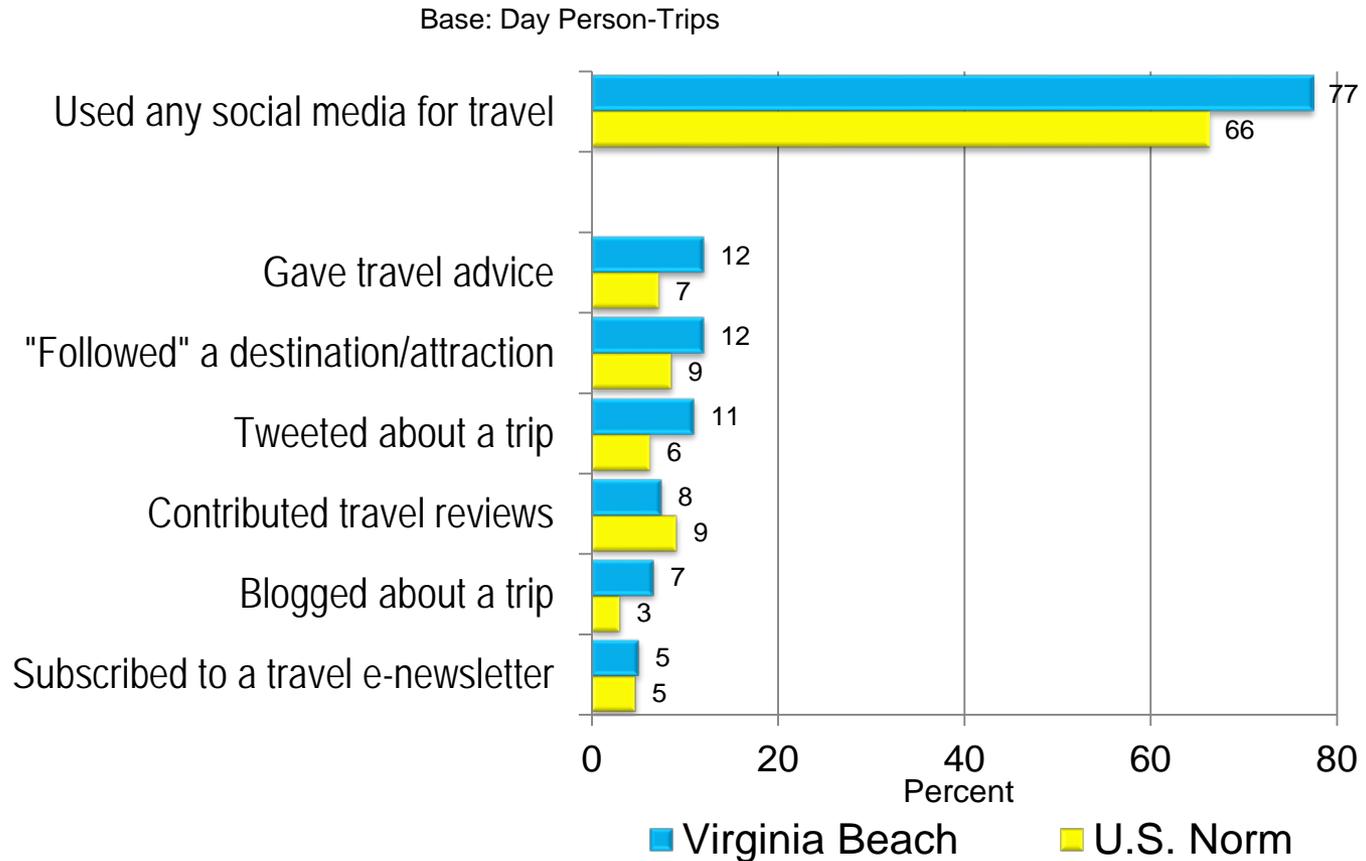


# Online Social Media Use by Travelers

Base: Day Person-Trips



# Online Social Media Use by Travelers



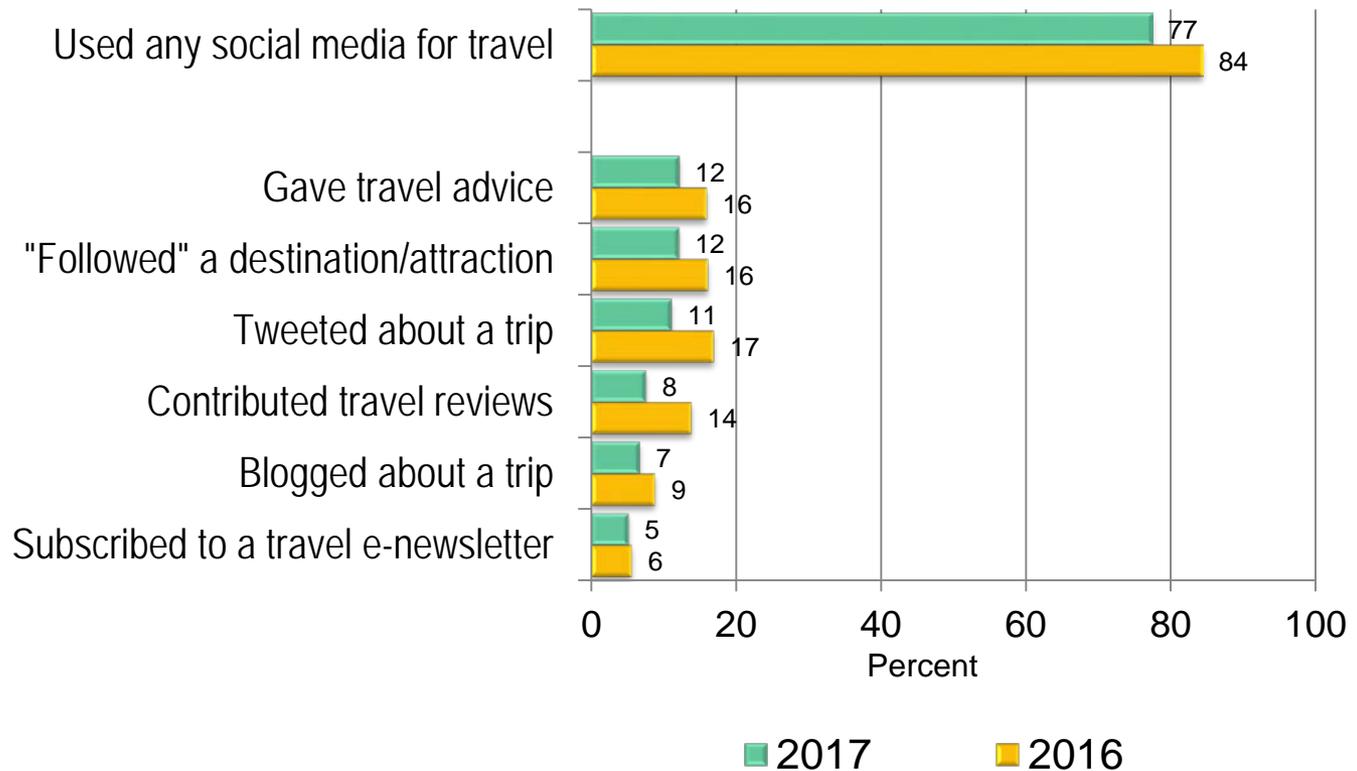
# Online Social Media Use by Travelers – 2017 vs. 2016

Base: Day Person-Trips

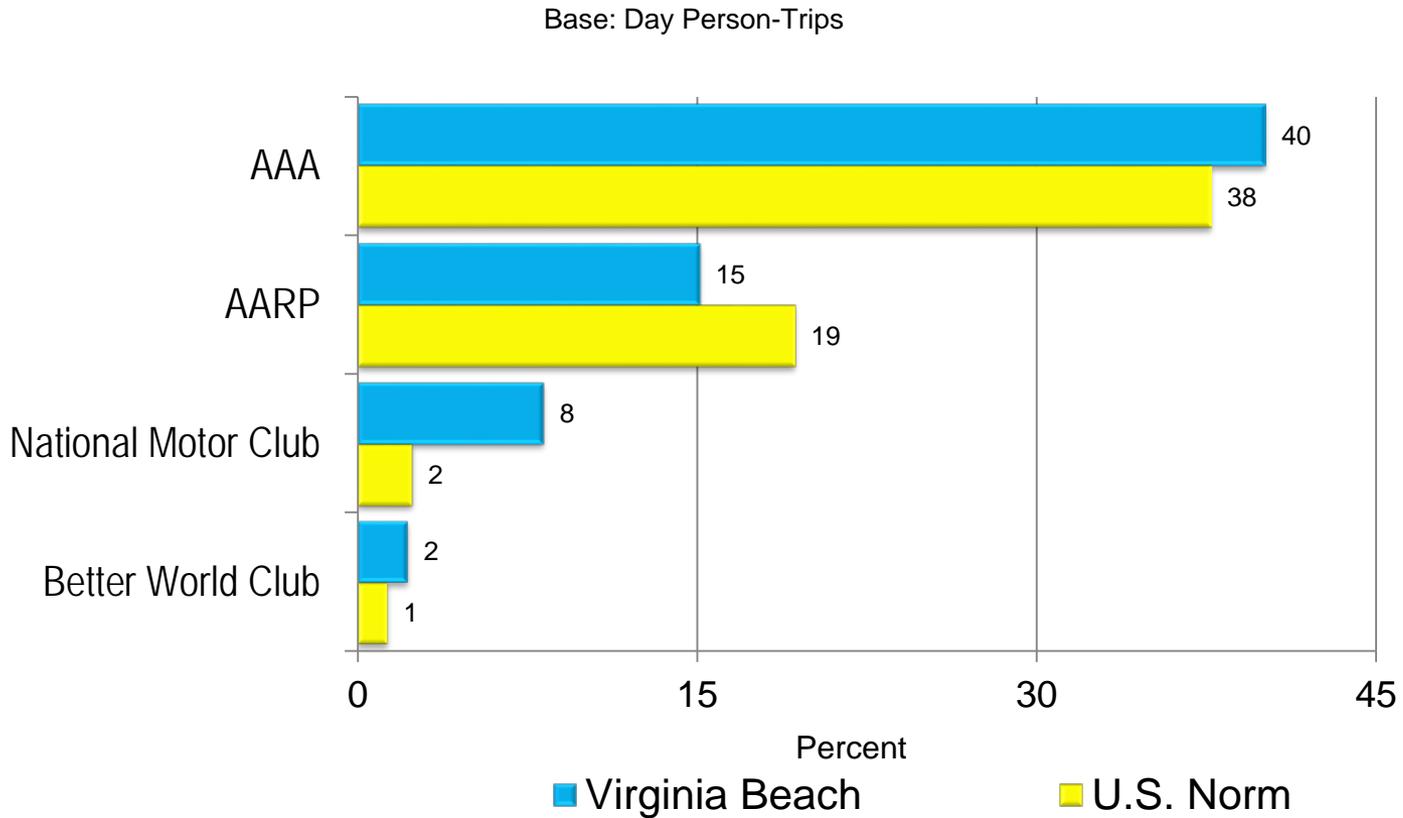


# Online Social Media Use by Travelers – 2017 vs. 2016

Base: Day Person-Trips



# Organization Membership

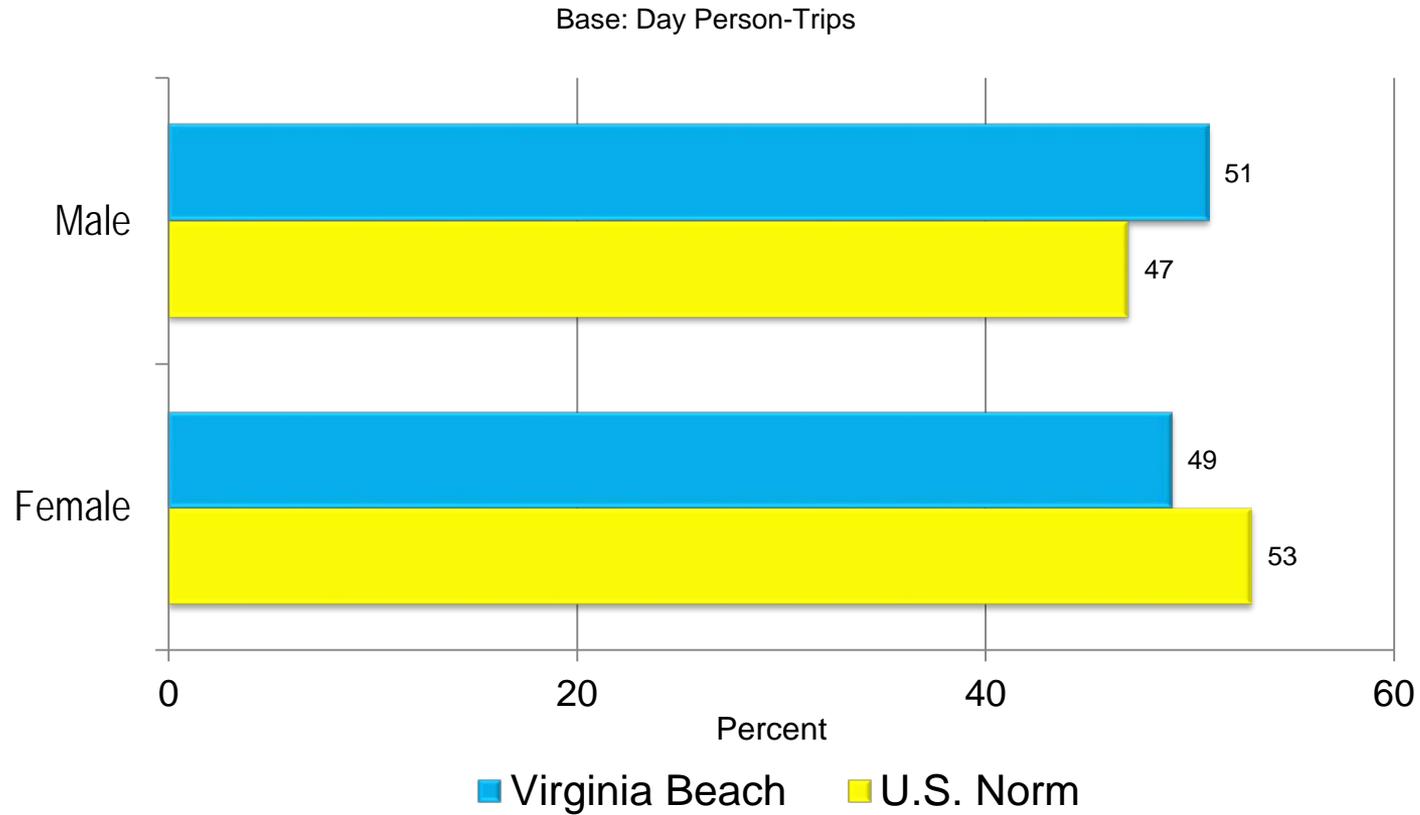




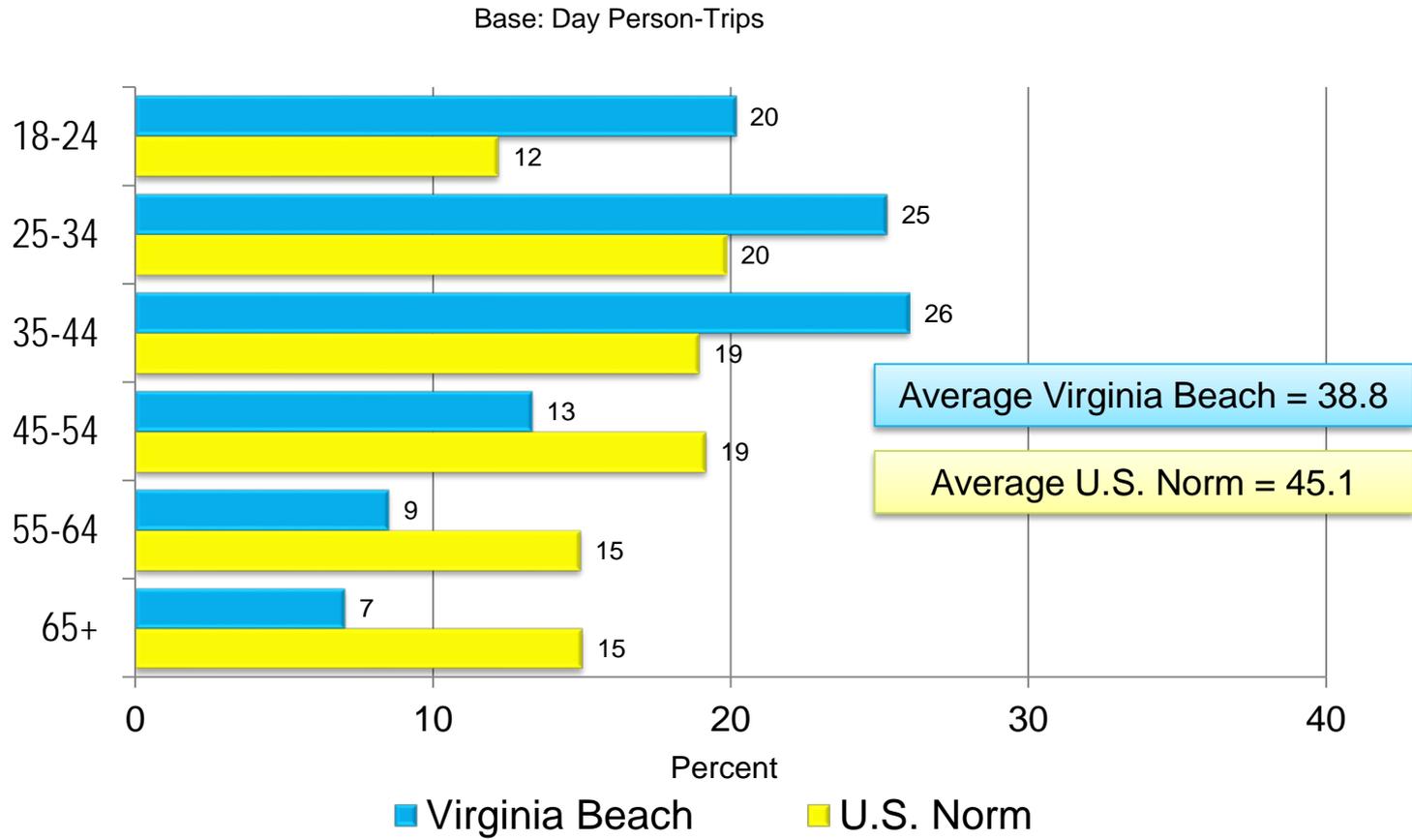
## Demographic Profile of Day Visitors



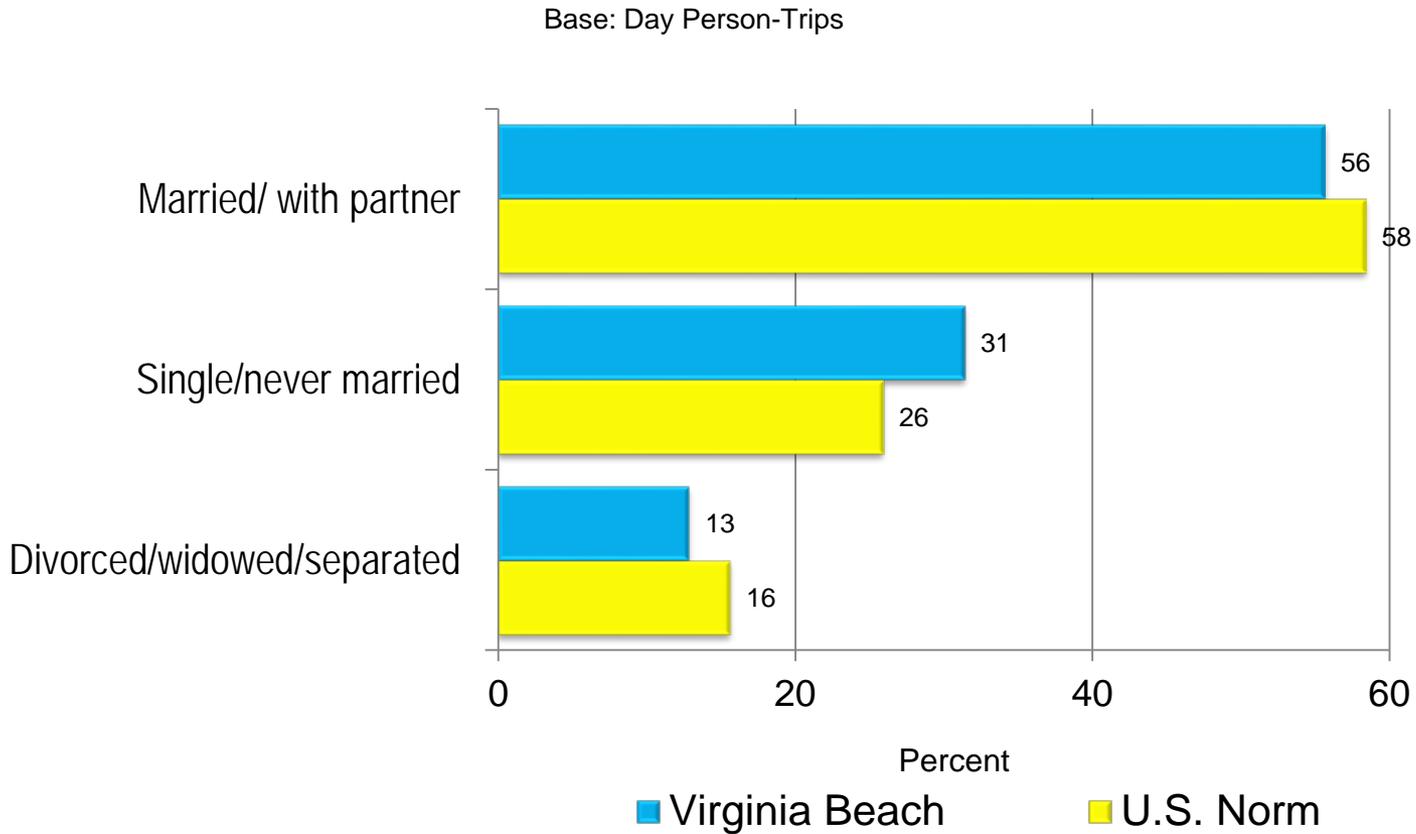
# Gender



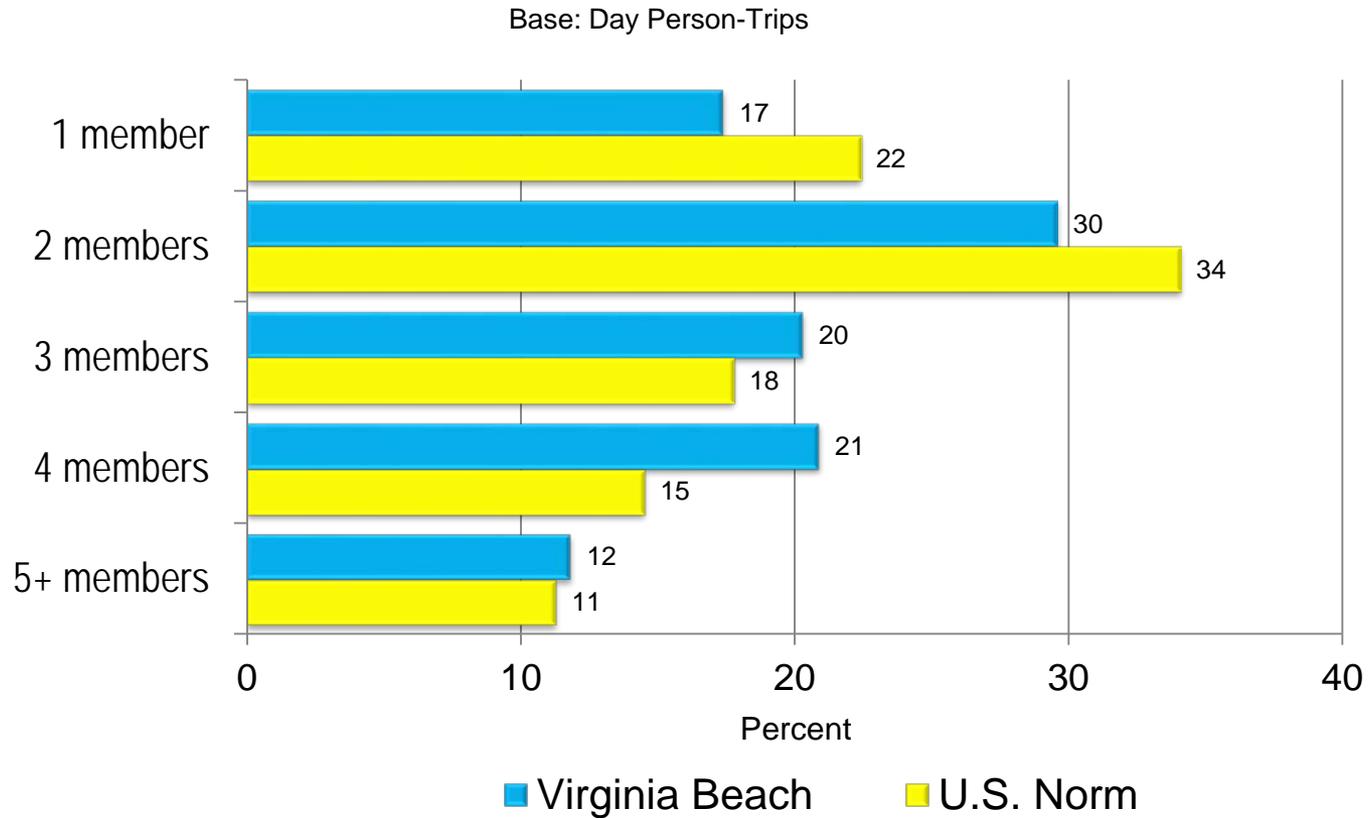
# Age



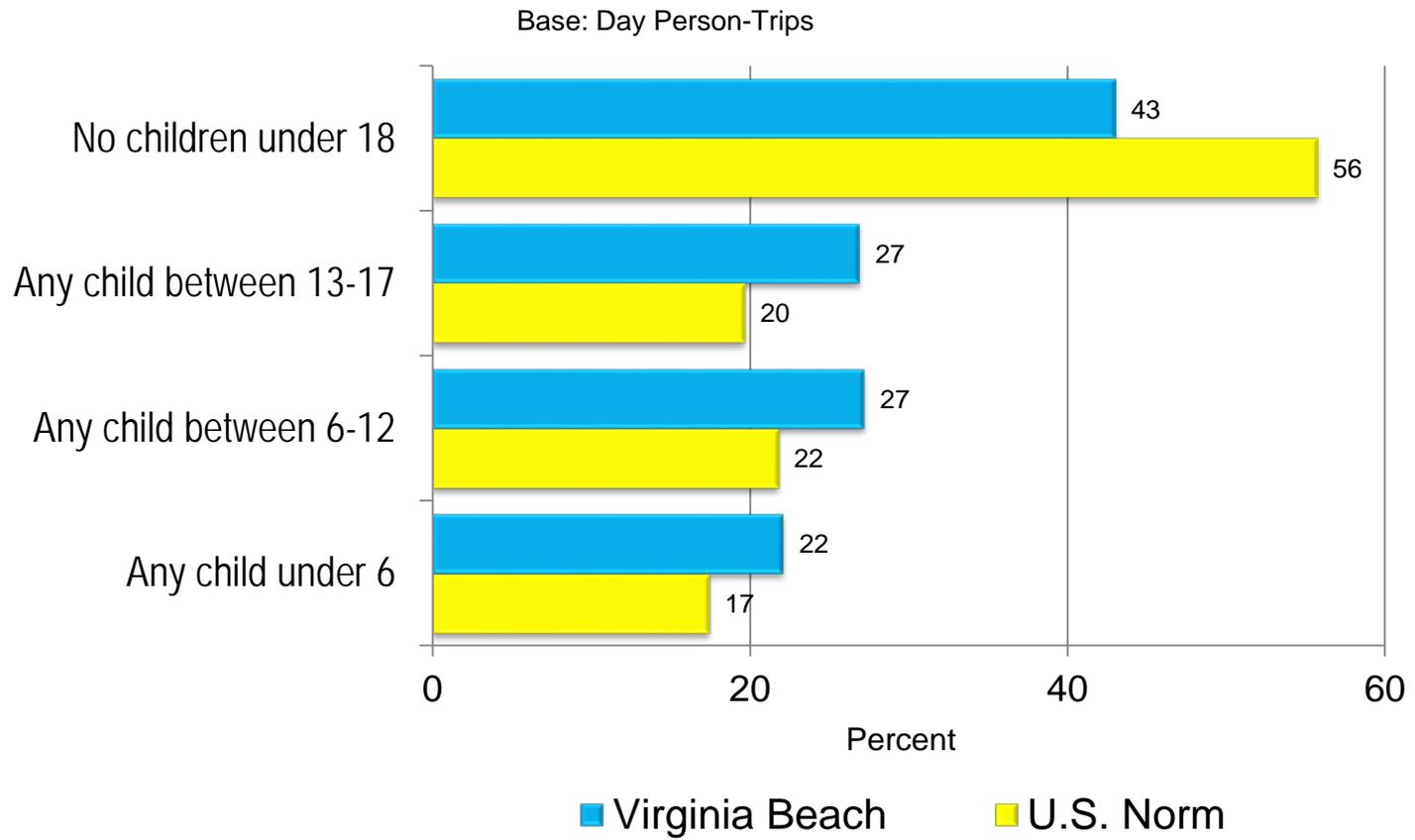
# Marital Status



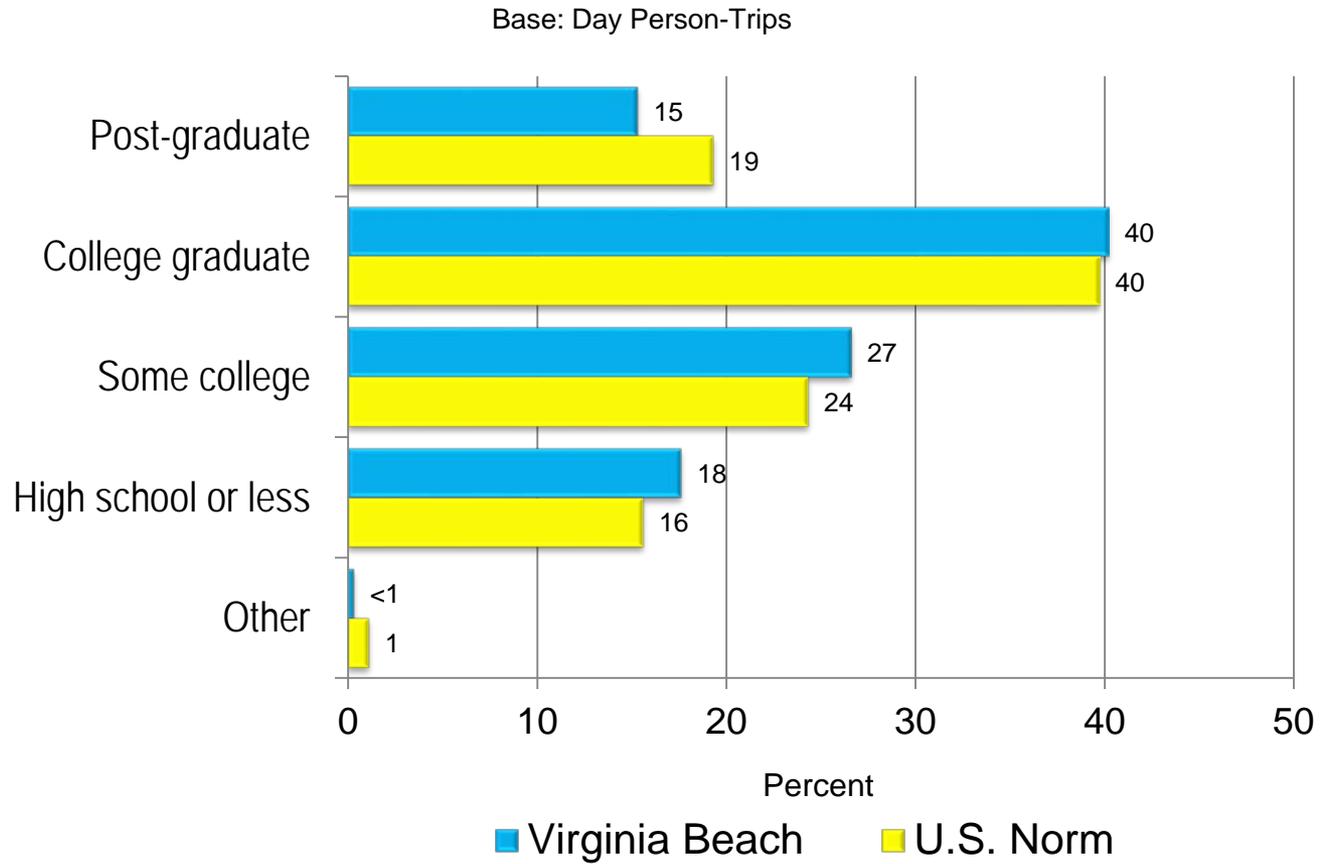
# Household Size



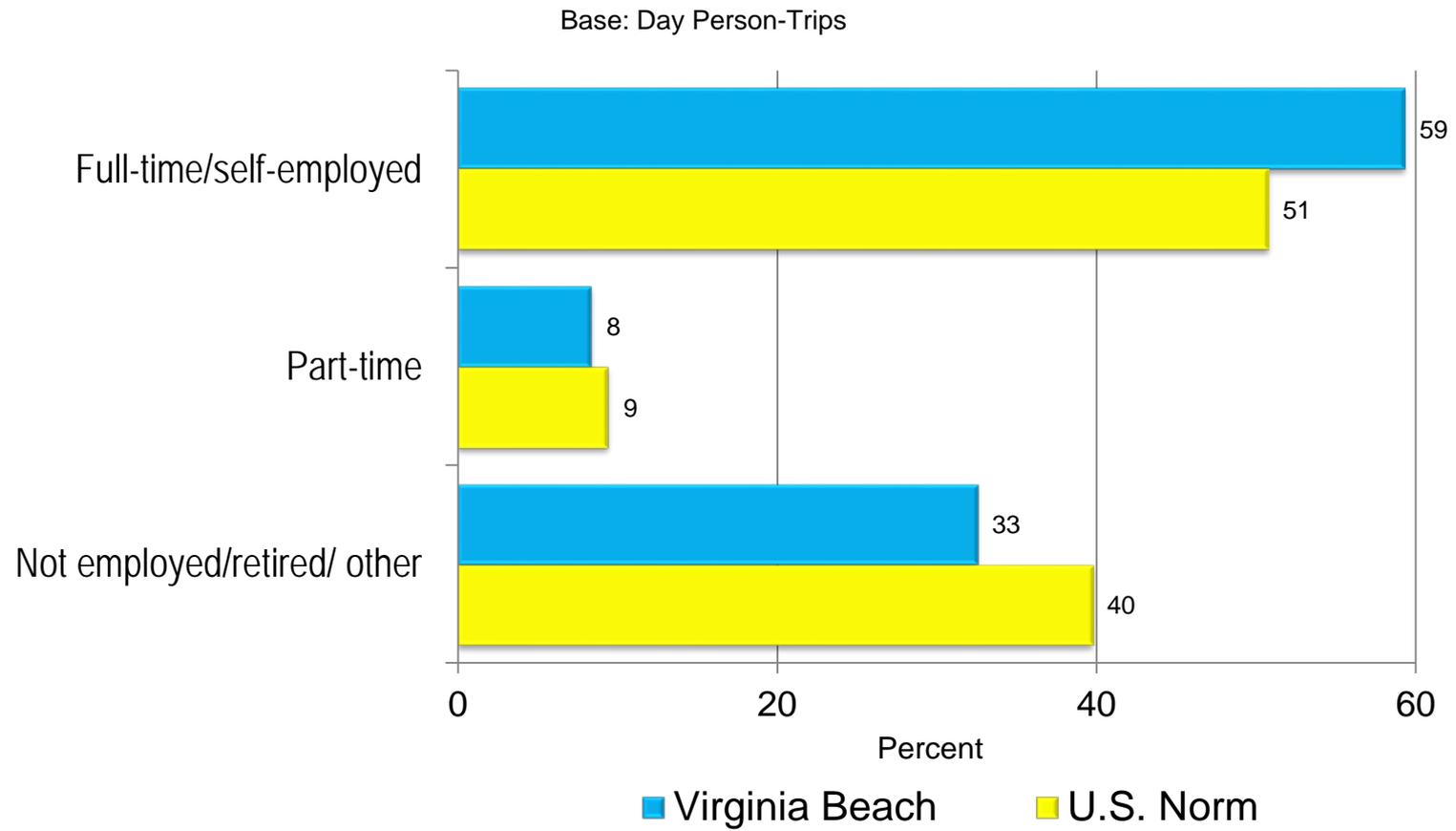
# Children in Household



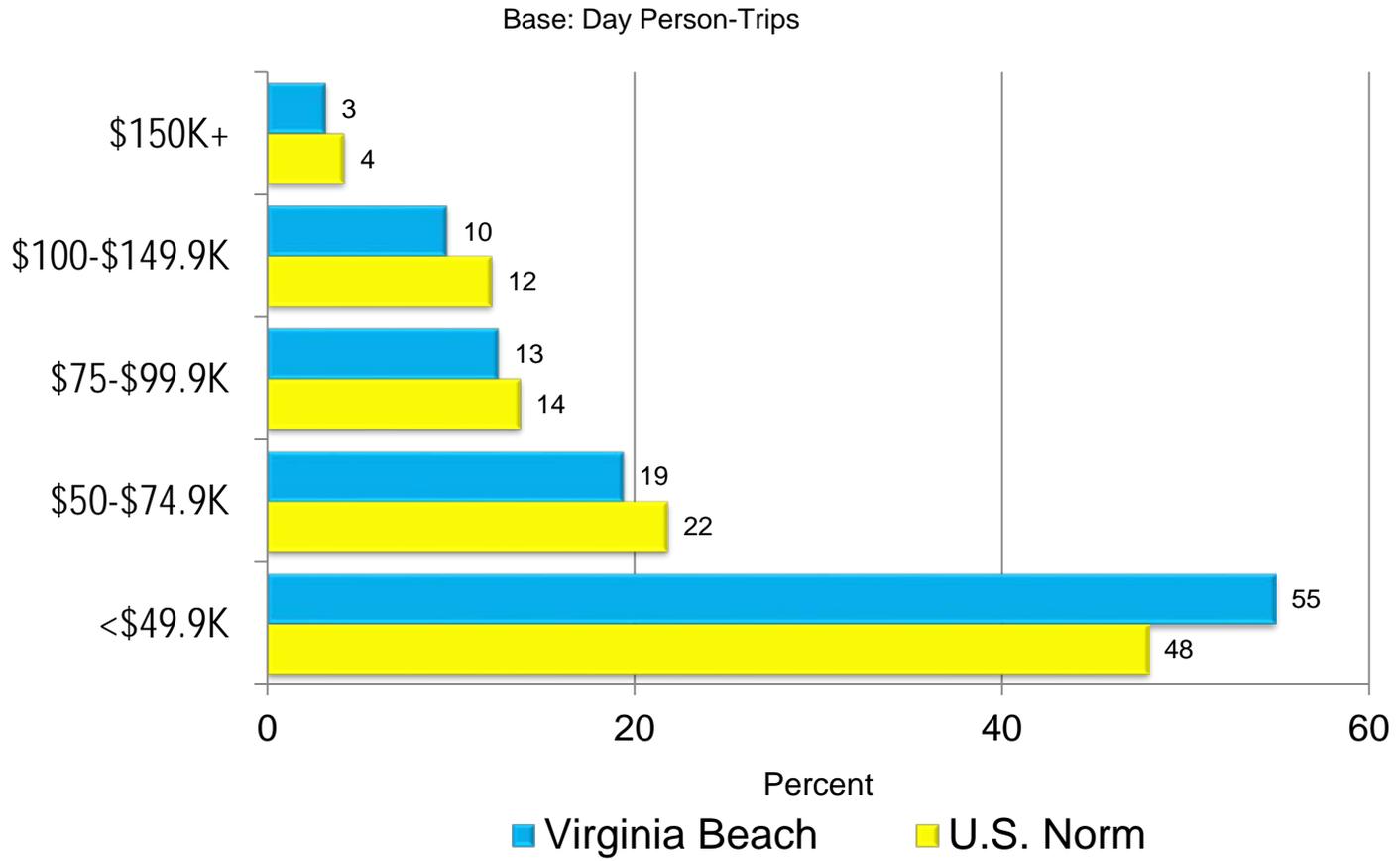
# Education



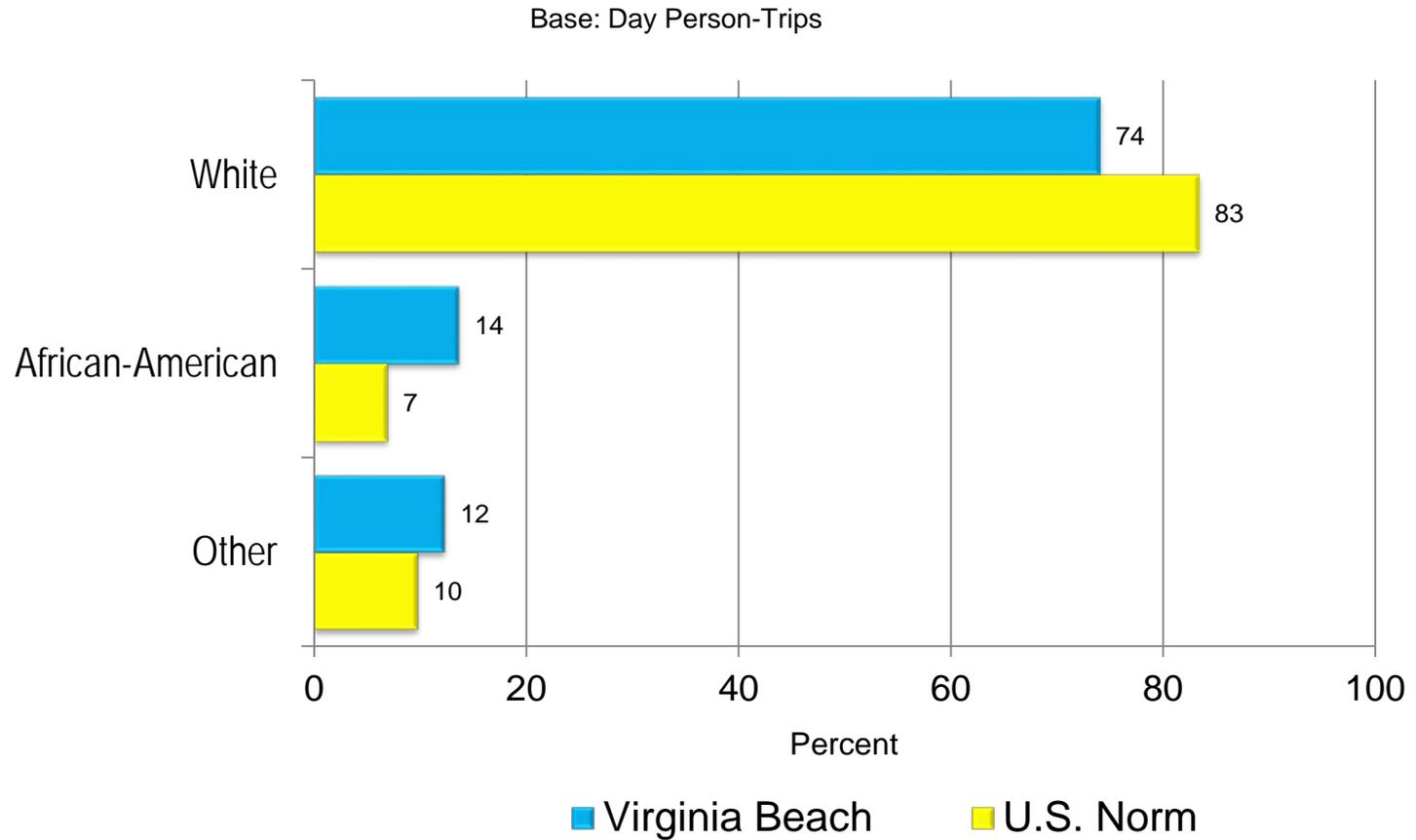
# Employment



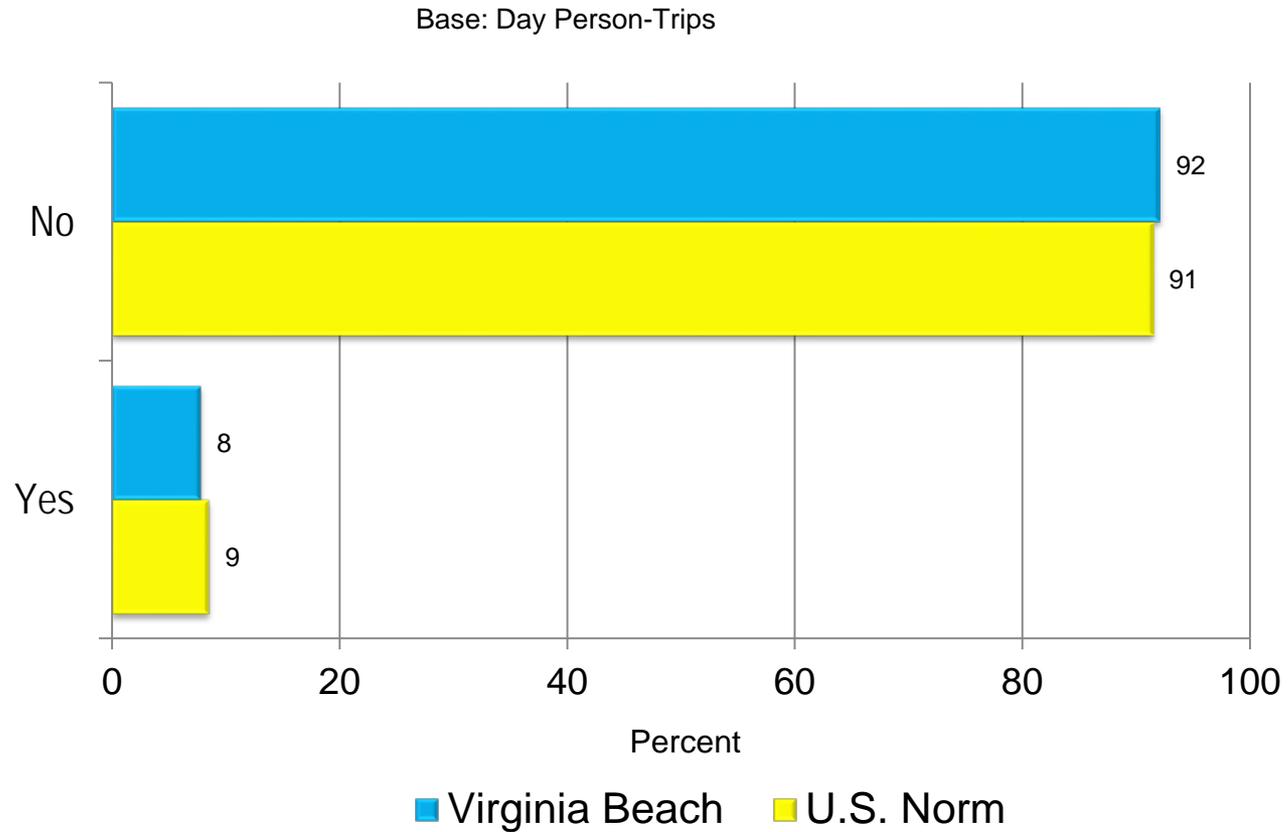
# Household Income



# Race



# Hispanic Background



## Appendix A: 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

## Appendix B: How Visitation to Virginia Beach is Calculated



# How Visitation to Virginia Beach is Calculated

- The Virginia Beach CVB's visitation research provider, Longwoods International, is a leading international hospitality research firm headquartered in Toronto. The Longwoods Travel USA® program is currently the largest ever ongoing survey of American leisure and business travel. Virginia Beach visitors were identified using Longwoods' Travel USA®, our syndicated study of American travel behavior:
- 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. They are selected to be representative of the U.S. adult population
- In 2017, for example, Longwoods collected data on 329,470 trips for analysis nationally, comprised of 232,317 overnight trips and 97,153 day trips.:
- Destination detail includes all 50 states and the District of Columbia, selected U.S. cities and regions, and foreign destinations.
- While acknowledged to be estimates, Longwoods data is accepted globally throughout the hospitality industry as accurate and authoritative. And since the company's data is so widely used and calculated consistently across clients, Virginia Beach data can be accurately compared with other destinations. When we present our Longwoods reports to hotel companies, hospitality consultants, developers and other interested private-sector entities, they are not questioned.

# How Visitation to Virginia Beach is Calculated

- In the main report. We present visitation data from Longwoods' Travel USA® for the 5 years from 2013 through 2017. Full-year, citywide overnight visitation is reported to us in “overnight person-trips,” which is defined as an adult or child staying overnight in any location – in Virginia Beach or in some other destination – but still visiting Virginia Beach at some point. All types of visitation are counted.
- Longwoods further estimates that Virginia Beach captures about 7 in 10 of these adults and children (74% in 2017) who stayed in some type of overnight accommodation, including private residences, military accommodations, rental homes, hotels, motels, condos, time shares, campgrounds, etc. So these 74% are, in fact, all **overnight visitors** to Virginia Beach. Of these people, 64% in 2017 stayed in a hotel or motel. Thus, for the past 5 years, Longwoods estimated data for Virginia Beach shows:

	<u>Total Overnight VB Person-Trips</u>	<u>Overnight Visitors In VB</u>	<u>Hotel Or Motel In VB</u>
2013	8.4 million	5.9 million	3.6 million
2014	8.6 million	6.0 million	3.8 million
2015	8.7 million	6.4 million	4.0 million
2016	9.6 million	7.1 million	4.5 million
2017	10.1 million	7.4 million	4.7 million

# How Visitation to Virginia Beach is Calculated

- Additional and more complicated calculations could be applied to the second and third column values to estimate actual room nights by commercial accommodation type, but this would require precise unit rental information, party size information, and length of stay information across all accommodation types during all 12 months of the year. We do not have this information at this time.
- Longwoods International also estimates day visitors to Virginia Beach. A day visitor is someone who doesn't spend a night away from home and whose residence is located more than 50 miles away from Virginia Beach, so "locals" are not counted. The day visitors, adults and children, for the past 5 years are reported to be:

2013	6.9 million
2014	7.2 million
2015	7.5 million
2016	8.1 million
2017	8.9 million

# How Visitation to Virginia Beach is Calculated

- Finally, estimates for the main purpose of visit for adults only, expressed as a percentage of total, are provided below as well as in the main part of the report. For the past 5 years, these values are:

	<u>Leisure Trip</u>	<u>Business Trip</u>	<u>Combined Business-Leisure</u>
2013	88%	7%	4%
2014	89%	7%	4%
2015	90%	7%	3%
2016	89%	7%	4%
2017	92%	5%	3%