# Table of Contents

- Introduction ........................................................................................................... 3
- Research Objectives ................................................................................................. 4
- Research Method ....................................................................................................... 5
- Travel Market Size & Structure ............................................................................... 6
- Overnight Expenditures ............................................................................................ 11
- Overnight Trip Characteristics .................................................................................. 15
- Demographic Profile of Overnight Visitors to West Virginia ................................. 39
- Appendix: Key Terms Defined ................................................................................... 50
Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.

In 2007, our proprietary Longwoods Travel USA® program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.

It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.

This report provides an overview for West Virginia domestic tourism business in 2013.
Research Objectives

- The visitor research program is designed to provide:
  - estimates of domestic overnight visitor volumes to West Virginia
  - a profile of West Virginia’s performance within its overnight travel market
  - Domestic visitor expenditures in West Virginia
  - profiles of West Virginia’s overnight trips and travelers.
Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders. For the 2013 travel year, this yielded 229,726 overnight trips for analysis nationally. For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets. For West Virginia, a sample of 1,168 overnight trips the following sample was achieved in 2013. For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.
Travel Market Size & Structure
Total Size of the U.S. Travel Market — 2009-2013

Base: Total Overnight Trips

- 2009: 1,312
- 2010: 1,367
- 2011: 1,413
- 2012: 1,451
- 2013: 1,480

Growth: 2.0%
Size of the West Virginia Travel Market* — 2009-2013

Base: Total Overnight Trips

* Estimates include adults and children
Size of West Virginia Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 15.2 Million

- Adults 77% (11.8 Million)
- Children 23% (3.4 Million)
Total Overnight Adult Trips to West Virginia

Base: Adult Overnight Person-Trips to West Virginia

Millions of Trips

- '04: 10.5
- '05: 11.2
- '06: 11.4
- '07: 11.7
- '08: 11.0
- '09: 10.6
- '10: 11.6
- '11: 12.0
- '12: 12.0
- '13: 11.8

Years: '04 to '13
Overnight Expenditures
Total Domestic West Virginia Overnight Spending — by Sector

- Lodging: 36%
- Food & Beverage: 23%
- Recreation/Entertainment: 14%
- Transportation: 14%
- Retail: 14%
Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Total Overnight Person-Trips to West Virginia

- Lodging: $156
- Restaurant Food & Beverage: $100
- Retail Purchases: $61
- Recreation/Sightseeing/Entertainment: $60
- Transportation at Destination: $60
Average Per Party Expenditures on Overnight Trips — Leisure vs. Business

Base: Total Overnight Person-Trips to West Virginia

<table>
<thead>
<tr>
<th>Category</th>
<th>Leisure</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$142</td>
<td>$260</td>
</tr>
<tr>
<td>Restaurant Food &amp; Beverages</td>
<td>$95</td>
<td>$133</td>
</tr>
<tr>
<td>Retail Purchases</td>
<td>$59</td>
<td>$72</td>
</tr>
<tr>
<td>Recreation/Sightseeing/Entertainment</td>
<td>$67</td>
<td>$18</td>
</tr>
<tr>
<td>Transportation at Destination</td>
<td>$58</td>
<td>$72</td>
</tr>
</tbody>
</table>
Main Purpose of Trip

Base: Overnight Person-Trips to West Virginia

- Visiting friends/relatives: 46%
- Touring: 9%
- Outdoors: 8%
- Special event: 7%
- Casino: 3%
- Resort: 2%
- City trip: 2%
- Skiing/snowboarding: 8%
- Other business trip: 2%
- Conference/Convention: 2%
- Business-leisure: 4%

Marketable Trips: 40%
Main Purpose of Leisure Trip — West Virginia vs. National Norm

Base: Overnight Person-Trips

<table>
<thead>
<tr>
<th>Purpose</th>
<th>West Virginia</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting friends/relatives</td>
<td>44</td>
<td>46</td>
</tr>
<tr>
<td>Touring</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Outdoors</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Special event</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Casino</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Resort</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>City trip</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Skiing/Snowboarding</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

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

Base: Overnight Person-Trips

Other business trip

Conference/Convention

Percent

West Virginia | U.S. Norm

0 10 20 30 40 50 60
State Origin Of Trip

Base: Overnight Person-Trips to West Virginia

- West Virginia: 14%
- Virginia: 13%
- Ohio: 7%
- North Carolina: 7%
- Pennsylvania: 5%
- Maryland: 5%
- Florida: 3%
- New York: 2%
- Kentucky: 2%
- Georgia: 2%
- New Jersey: 2%
- Texas: 0%

Percent
DMA Origin Of Trip

Base: Overnight Person-Trips to West Virginia

- Washington, DC: 12%
- Charleston-Huntington, KY/OH/WV: 8%
- Cleveland, OH: 6%
- Pittsburgh, PA: 5%
- New York, NY/NJ/PA/CT: 4%
- Clarksburg-Weston, WV: 4%
- Beckley-Bluefield-Oak Hill, WV: 3%
- Charlotte, NC: 3%
- Columbus, OH: 3%
- Roanoke-Lynchburg, VA: 2%
- Baltimore, MD: 2%
- Norfork-Portsmouth-Newpt News, VA/NC: 2%
- Philadelphia, PA: 2%
- Greensboro-H. Point-W. Salem, NC: 2%

Percent
Sources of Business

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

BASE: Overnight Person-Trips to West Virginia
West Virginia Overnight Travel Market - Seasonality

Base: Overnight Person-Trips to West Virginia

- January-March: 21%
- April-June: 26%
- July-September: 28%
- October-December: 25%
Method of Planning Trip

Base: Overnight Person-Trips

- Internet: 42% (West Virginia), 54% (U.S. Norm)
- Travel Agent: 7% (West Virginia), 8% (U.S. Norm)
- Other: 10% (West Virginia), 7% (U.S. Norm)
- None: 51% (West Virginia), 39% (U.S. Norm)
Method of Booking Trip

Base: Overnight Person-Trips

- **Internet**: 40% (West Virginia), 53% (U.S. Norm)
- **Travel Agent**: 7% (West Virginia), 7% (U.S. Norm)
- **Other**: 7% (West Virginia), 4% (U.S. Norm)
- **None**: 54% (West Virginia), 40% (U.S. Norm)
Use of Devices for Trip Planning

Base: Overnight Person Trips

- **Used Any Device (Net):**
  - West Virginia: 69%
  - U.S. Norm: 76%

- **Laptop/ Tablet Computer:**
  - West Virginia: 39%
  - U.S. Norm: 42%

- **Home (Desktop) Computer:**
  - West Virginia: 37%
  - U.S. Norm: 43%

- **Smartphone:**
  - West Virginia: 18%
  - U.S. Norm: 20%

**Base:** Overnight Person Trips

**West Virginia** vs. **U.S. Norm**
Use of Devices During Trip

Base: Overnight Person-Trips

- Used Any Device (Net)
  - West Virginia: 70%
  - U.S. Norm: 73%
- Smartphone
  - West Virginia: 51%
  - U.S. Norm: 53%
- Laptop/Tablet Computer
  - West Virginia: 42%
  - U.S. Norm: 43%
- Home (Desktop) Computer
  - West Virginia: 7%
  - U.S. Norm: 7%
Total Nights Away on Trip

Base: Overnight Person-Trips

Average
West Virginia = 3.0 Nights

Average
U.S. Norm = 3.6 Nights

<table>
<thead>
<tr>
<th></th>
<th>West Virginia</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>24</td>
<td>31</td>
</tr>
<tr>
<td>2 nights</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>3-4 nights</td>
<td>24</td>
<td>26</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>7-13 nights</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>14+ nights</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

West Virginia Average = 3.0 Nights
U.S. Norm Average = 3.6 Nights

Base: Overnight Person-Trips
Number of Nights Spent in West Virginia

Average Nights Spent in West Virginia = 2.6

- 1 night: 35
- 2 nights: 29
- 3-4 nights: 24
- 5-6 nights: 6
- 7+ nights: 6

Base: Overnight Person-Trips with 1+ Nights Spent In West Virginia
Size of Travel Party

Base: Overnight Person-Trips

West Virginia
- Adults: 2.4
- Children: 0.8
- Total = 3.2

U.S. Norm
- Adults: 2.2
- Children: 0.7
- Total = 2.9

Average No. of People
- Adults
- Children
Transportation

Base: Adult Overnight Person-Trips

Personal Vehicles

- Own car/truck
- Rental car
- Camper, R.V
- Taxi Cab
- Bicycle
- Motorcycle

Commercial Vehicles

- Plane
- Train
- Bus
- Ship/Boat

Percent

West Virginia
US Norm
Accommodations

Base: Overnight Person-Trips

- Friends/relatives’ dwelling (not paid for)
- Hotel
- Motel
- Resort hotel
- Campground/trailer park/RV park
- Rented cottage/cabin
- Bed & breakfast
- Country inn/lodge
- Own home/condo/apt/second home
- Rented home/condo/apartment
- Time share

Percent
0 10 20 30 40
West Virginia
U.S. Norm

1. Friends/relatives’ dwelling (not paid for): 33%
2. Hotel: 25%
3. Motel: 18%
4. Resort hotel: 15%
5. Campground/trailer park/RV park: 7%
6. Rented cottage/cabin: 6%
7. Bed & breakfast: 6%
8. Country inn/lodge: 5%
9. Own home/condo/apt/second home: 4%
10. Rented home/condo/apartment: 3%
11. Time share: 3%
Activities and Experiences

Base: Overnight Person-Trips

- Shopping: West Virginia 30%, U.S. Norm 34%
- Landmark/Historic site: West Virginia 17%, U.S. Norm 17%
- National/State Park: West Virginia 14%, U.S. Norm 16%
- Swimming: West Virginia 14%, U.S. Norm 17%
- Fine dining: West Virginia 12%, U.S. Norm 17%
- Fishing: West Virginia 7%, U.S. Norm 10%
- Casino: West Virginia 14%, U.S. Norm 12%
- Hiking/Backpacking: West Virginia 7%, U.S. Norm 10%
- Museum: West Virginia 10%, U.S. Norm 11%
- Camping: West Virginia 11%, U.S. Norm 10%
- Bar/Disco/Nightclub: West Virginia 12%, U.S. Norm 13%

Base: Overnight Person-Trips - Trips
Activities and Experiences (Cont’d)

Base: Overnight Person-Trips

- Theme park: West Virginia 8, U.S. Norm 8
- Theater: West Virginia 8, U.S. Norm 8
- Zoo: West Virginia 6, U.S. Norm 8
- Business meeting: West Virginia 5, U.S. Norm 7
- Fair/Exhibition/Festival: West Virginia 2, U.S. Norm 7
- Hunting: West Virginia 1, U.S. Norm 7
- Beach/Waterfront: West Virginia 14, U.S. Norm 5
- Art gallery: West Virginia 6, U.S. Norm 6
- Boating/Sailing: West Virginia 6, U.S. Norm 6
- Brewery: West Virginia 5, U.S. Norm 6
- Dance: West Virginia 5, U.S. Norm 6
- Spa: West Virginia 6, U.S. Norm 5
Activities and Experiences (Cont’d)

Base: Overnight Person-Trips

- Biking: 6% (West Virginia), 6% (U.S. Norm)
- Mountain climbing: 2% (West Virginia), 4% (U.S. Norm)
- Convention/conference: 6% (West Virginia), 4% (U.S. Norm)
- Golf: 6% (West Virginia), 4% (U.S. Norm)
- Rafting: 1% (West Virginia), 5% (U.S. Norm)
- Skiing/Snowboarding: 2% (West Virginia), 5% (U.S. Norm)
- Winery: 4% (West Virginia), 5% (U.S. Norm)
- Participate in sports event for kids: 2% (West Virginia), 3% (U.S. Norm)
- Pro/College sports event: 5% (West Virginia), 5% (U.S. Norm)
- Participate in sports event for adults: 1% (West Virginia), 3% (U.S. Norm)

Percent

Base: Overnight Person-Trips

West Virginia U.S. Norm

Biking
Mountain climbing
Convention/conference
Golf
Rafting
Skiing/Snowboarding
Winery
Participate in sports event for kids
Pro/College sports event
Participate in sports event for adults

Percent

0 10 20 30 40
Activities and Experiences (Cont’d)

Base: Overnight Person-Trips

- Watch Amateur/Youth Sports: 5 West Virginia, 4 U.S. Norm
- Tennis: 4 West Virginia, 3 U.S. Norm
- Rock/Pop concert: 4 West Virginia, 3 U.S. Norm
- Birding: 3 West Virginia, 2 U.S. Norm
- Trade show: 4 West Virginia, 3 U.S. Norm
- Rodeo: 3 West Virginia, 1 U.S. Norm
- Motorcycle touring: 1 West Virginia, 1 U.S. Norm
- Opera: 3 West Virginia, 1 U.S. Norm
- Participate in Amateur/Youth Sports: 1 West Virginia, 3 U.S. Norm
- Symphony: 1 West Virginia, 1 U.S. Norm

West Virginia U.S. Norm
Activities of Special Interest

Base: Overnight Person-Trips

- Historic places: 33% (West Virginia), 25% (U.S. Norm)
- Cultural activities/attractions: 23% (West Virginia), 21% (U.S. Norm)
- Exceptional culinary experiences: 16% (West Virginia), 14% (U.S. Norm)
- Traveling with grandchildren: 8% (West Virginia), 7% (U.S. Norm)
- Winery tours/Wine tasting: 7% (West Virginia), 6% (U.S. Norm)
- Eco-tourism: 6% (West Virginia), 8% (U.S. Norm)

Percent
Online Social Media Use by Travelers

- Used any social media for travel: 72% (West Virginia), 70% (U.S. Norm)
- Used Smartphone while traveling: 43% (West Virginia), 43% (U.S. Norm)
- Posted travel photos/video online: 29% (West Virginia), 24% (U.S. Norm)
- Read travel reviews: 20% (West Virginia), 20% (U.S. Norm)
- Looked at travel photos/video online: 18% (West Virginia), 18% (U.S. Norm)
- Accessed travel news/events/deals/promotions: 13% (West Virginia), 13% (U.S. Norm)
- Connected with others interested in travel: 8% (West Virginia), 12% (U.S. Norm)
- "Followed" a destination/attraction: 18% (West Virginia), 13% (U.S. Norm)

Base: Overnight Person-Trips
Online Social Media Use by Travelers (Cont’d)

Base: Overnight Person-Trips

- Used any social media for travel: 70% (West Virginia) vs. 72% (U.S. Norm)
- Read a travel blog: 12% (West Virginia) vs. 12% (U.S. Norm)
- Contributed travel reviews: 9% (West Virginia) vs. 11% (U.S. Norm)
- Gave travel advice: 8% (West Virginia) vs. 10% (U.S. Norm)
- Got travel advice: 10% (West Virginia) vs. 10% (U.S. Norm)
- Tweeted about a trip: 9% (West Virginia) vs. 8% (U.S. Norm)
- Subscribed to a travel e-newsletter: 6% (West Virginia) vs. 7% (U.S. Norm)
- Blogged about a trip: 10% (West Virginia) vs. 12% (U.S. Norm)
Demographic Profile of Overnight Visitors to West Virginia
Gender

Base: Total Person-Trips to West Virginia

Female: 51%
Male: 49%

Percent

Base: Total Person-Trips to West Virginia
Base: Total Person-Trips to West Virginia

Average = 42

- 18-24: 14
- 25-44: 31
- 45-64: 45
- 65 or older: 10

Age

Percent
Household Size

Base: Total Person-Trips to West Virginia

Average = 3.4

- 1 member: 19
- 2 members: 27
- 3 members: 19
- 4 members: 21
- 5+ members: 0

Percent

Average = 3.4
Household Income

Base: Total Person-Trips to West Virginia

- $150K+: 4%
- $100-$149.9K: 11%
- $75K-$99.9K: 23%
- Under $49.9K: 51%
Marital Status

Base: Total Person-Trips to West Virginia

- Married/ with partner: 60%
- Single/Never Married: 25%
- Separated/Divorced/Widowed: 15%

Percent
Children in Household

Base: Total Person-Trips to West Virginia

- No Children Under 18: 47%
- Any child between 13-17: 27%
- Any child between 6-12: 28%
- Any child under 6: 22%

Percent

Base: Total Person-Trips to West Virginia
Base: Total Person-Trips to West Virginia

- Post-graduate: 14%
- College graduate: 32%
- Some college: 26%
- High school or less: 27%
- Other: 1%
Employment

Base: Total Person-Trips to West Virginia

- Full-time/Self-employed: 45%
- Part-time: 10%
- Not employed/Retired/ Other: 45%
Race

Base: Total Person-Trips to West Virginia

- White: 88%
- African-American: 6%
- Other: 6%

Percent: Base: Total Person-Trips to West Virginia
Hispanic Background

Base: Total Person-Trips to West Virginia

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6</td>
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</table>
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 **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:** includes 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:** includes
  - 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:** Includes all leisure trips, with the exception of visits to friends/relatives