



RESEARCH REPORT

Durham Day Trippers

Activities and Impact of Visitors
From Within 50 Miles

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Data provided by D.K. Shifflet & Associates Ltd.



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Visitors who came to Durham for just the day infused \$374 million into Durham's economy in 2012.¹ The largest share of these visitors comes for leisure and 95% of them participate in some activity while they are here. They care most about finding good value for the money they spend, being able to find their way around, and feeling safe. Dining, shopping, and visiting friends and relatives are the activities they participate in most often while they are here; shopping and visiting friends and relatives are the two most common reasons for their day trip.

These facts are some of the highlights from a research study the Durham Convention & Visitors Bureau (DCVB) contracted from D.K. Shifflet, a leading travel and tourism research company. The study investigated Durham's day trip market – that is, the impact of visitors who live in a zip code that is within a 50-mile radius of Durham County and who visited Durham without staying overnight.²

This white paper aims to better understand the needs, demographics, and opinions of Durham's day trippers by putting this study in a practical context so its findings can be put to use.

Durham Day Tripper Analysis

Why day trippers? And furthermore, why a 50-mile radius?

Many destination marketing organizations focus only on overnight visitors or in getting “heads in beds.” After all, DCVB, like most convention and visitors bureaus, is funded by an occupancy tax levied on hotel rooms. So, one might think, if DCVB needs to fill hotel rooms to even have an operating budget, why would it bother spending any time on visitors who only come to Durham for the day?

Others might wonder why only visitors from within a 50-mile radius are studied: don't day trippers drive in from Winston-Salem or places outside that range?

The answer is that DCVB does also study both overnight visitors and day trippers from more than 50 miles away. That just happens in a separate study, also contracted with D.K. Shifflet. However, that study does not include day trippers from within a 50-mile radius, which left a large gap in DCVB's understanding of day trippers from these close areas.

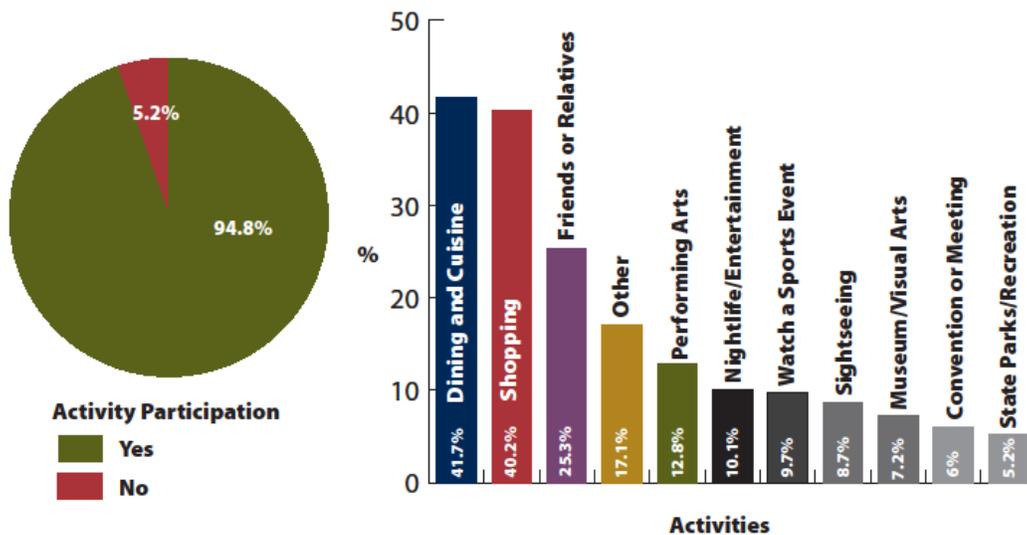
This study measures that segment and will demonstrate that day trippers from within 50 miles are incredibly important, for two main reasons.

(1) They come often and spend a lot

Of people who took at least one day trip to Durham in the past three months, nearly 75% took more than one. In other words, if visitors come here for one day trip, that means they are very likely to keep coming back, again and again.

Of course, DCVB’s goal is boosting Durham’s economy through visitor spending, so luring day trippers only matters if they spend money while they are here. This study shows that they do. It revealed that 95% of day trippers participated in some activity while they were here. The three most popular activities were dining out, shopping, and visiting friends or relatives.

Day Trippers: Activity Participation



Source: DCVB and D.K. Shifflet (2012)



That means day trippers spend money while they are here, even if it doesn’t amount to quite as much as overnight visitors. In a different, more recent study of all Durham visitors, it was estimated that a day tripper spends, on average, about \$110 when visiting for leisure purposes and about \$61 when here for business.³

It may seem counterintuitive to some that a leisure day visitor spends more than a business day visitor: aren’t business travelers here with big expense accounts? Not necessarily. A business visitor may drive to Durham and leave without doing anything more than filling up his gas tank or grabbing a quick lunch between sales calls, whereas a leisure day tripper might buy tickets to a show, have dinner, and go shopping all in the same trip.

In short, these day trippers represent a population easily within striking distance who only need to be convinced to make a short drive in order to add a substantial amount of revenue into the Durham economy - \$374 million in 2012.⁴ This figure has increased by 420% in the past five years.

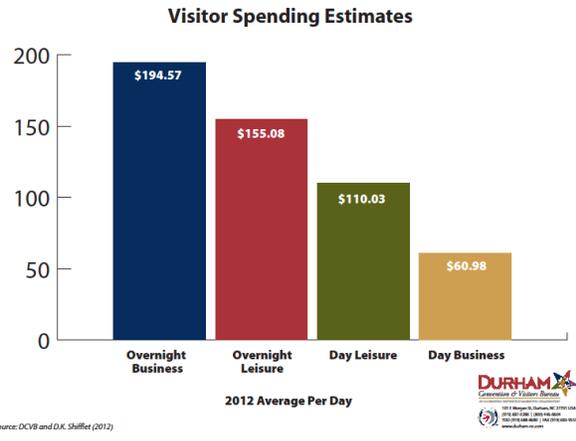
Each dollar spent also includes sales tax which reduces the tax burden on residents. These are visitors who are outside of the Durham tax base that can be turned into regular customers that regularly contribute to Durham through their consumption.

(2) A day trip is the first step in a long journey

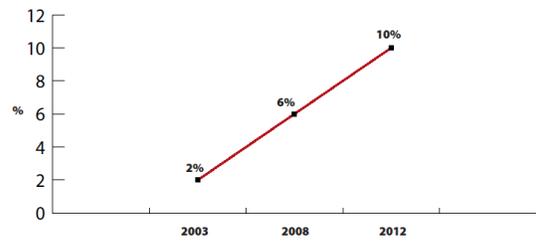
The other reason DCVB considers day trippers highly valuable is that targeting day trippers will likely lead to overnight visits eventually. Think about it this way: a visitor comes to Durham and has a fantastic meal while visiting a relative. Then, a few weeks later, she hears about a new musical coming to Durham and thinks about making a weekend out of the next trip to try out some of the things she did not have time for the first time around.

It can be hard to convince people to invest in an overnight stay in a place they do not know all that well, especially on the tail-end of a recession. So if visitors come to Durham for a day and have a good experience, then they will likely be more confident that an overnight stay is worth it.

This is something that has been happening more and more. According to the survey, almost 10% of day trippers also took an overnight trip to Durham in the same month, up from 2% in 2003 and 6% in 2008. It is the snowball effect of travel, and it is a big reason why annual visitor spending in Durham has grown \$152 million in the past five years, largely due to an increase in day trippers.⁵



Day Trippers Who Also Visited Durham Overnight

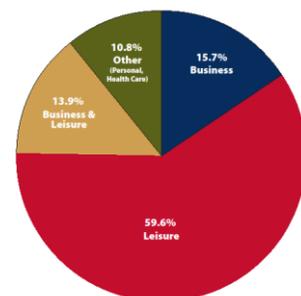


Reasons for Travel

Why do day trippers come to Durham? What influences them? What do they do once they get here?

Why they come

Day Trippers: Why They Come



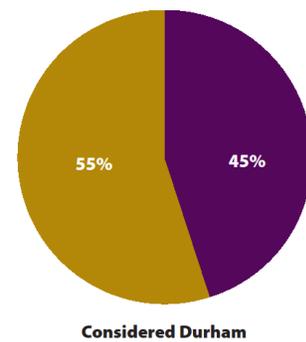
According to the study, leisure trips, at 60%, make up a majority of all day trips to Durham. A comparison with the 2008 day trip study also shows that leisure travel has taken an even larger share of the market, up from 51% in that year.

Though business and personal travel is a smaller portion of the market, both segments are significant. These travelers include individuals coming for healthcare, meetings, and other business purposes, and they typically spend money on food and beverage, retail, and transportation, according to the survey. Additionally, if those experiences are pleasant, they can be more easily persuaded to come back for future leisure trips.

Key influences

But what makes these day trippers, especially those who come for leisure purposes, choose Durham over other cities in the area?

Perhaps the most interesting statistic is that only 55% of day trippers claimed that they considered visiting Durham. That is, almost half of these trips were made with little planning beforehand, as evidenced by the fact that only 59% used any sources (such as internet searches, visitors guides, etc.) to guide their trip.

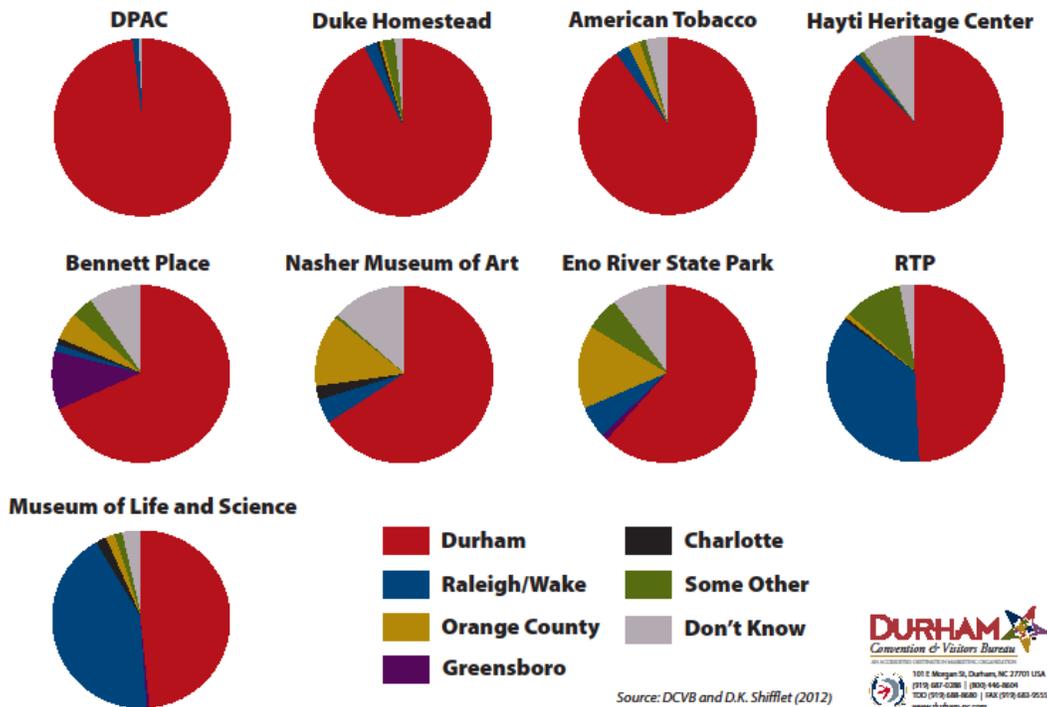


Source: DCVB and D.K. Shaffer (2012)

Two possible reasons for this are: (1) In a region such as the Triangle, many people live in one community and work in another, so they are already familiar with the areas they take day trips to.

(2) Many people do not associate all of Durham's assets with the destination, so they may consider Durham without realizing they were doing so by planning a trip to a Durham attraction. For instance, in this study, only 48% of the respondents placed the Museum of Life and Science in Durham. More than 42% thought it was in Raleigh. Likewise, only 49% knew Research Triangle Park was primarily in Durham; 36% placed it in Raleigh. Only two-thirds of respondents thought the Nasher Museum of Art was in Durham, while more than 13% thought it was in Chapel Hill.

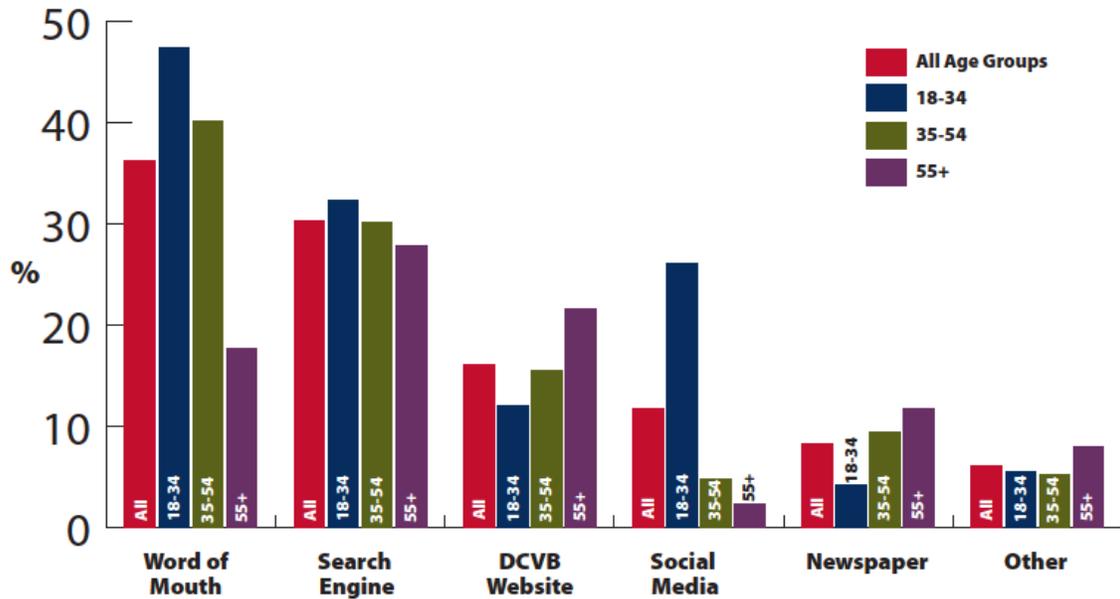
Day Trippers: Perceived Location of Venue



As a side note, thankfully, when DPAC – the Durham Performing Arts Center opened in 2008, the City did not sell its naming rights, contributing to the fact that 98% of the respondents know it is in Durham. The same is likely not true for Lowes Motor Speedway (Concord), the PNC Arena (Raleigh), or Bank of America Stadium (Charlotte).

Another interesting point about the sources used to plan trips is that younger respondents reported using sources more often, and they claimed to use social media – reported by 26% of 18-34 year olds – more than other age groups: social media was listed as a source by only 5% of 35-54 year olds and 2% of 55+ year olds. Additionally, word of mouth was a much more common source for 18-34 and 35-54 years olds – used by 47% and 40% respectively – than for the 55+ age group (18%). In fact, in all but the 55+ age group, word of mouth was the number one source used. Day trippers 55+ reported using a search engine for information most often, followed by information from DCVB or a Durham attraction.

Day Trippers: Sources for Trip Planning



Source: DCVB and D.K. Shifflet (2012)

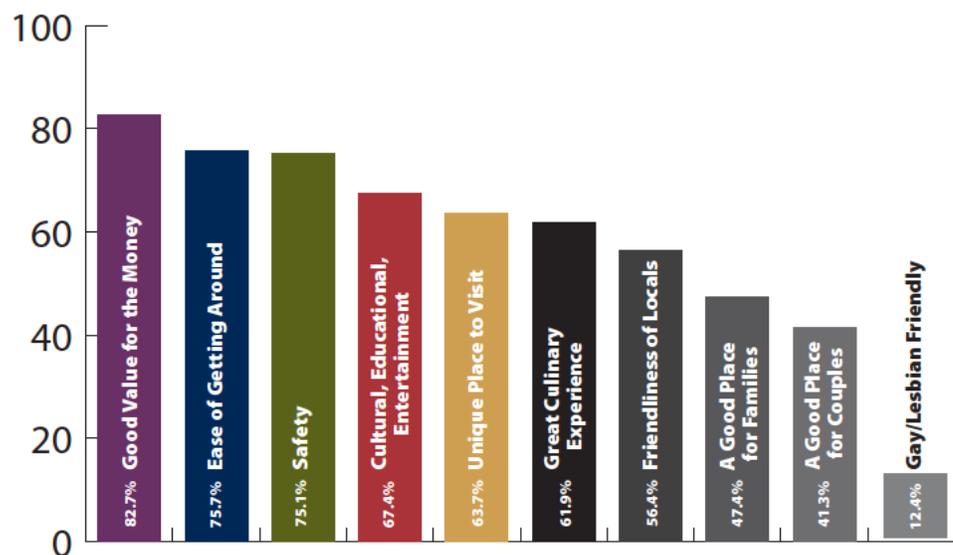


Important attributes in selecting a destination

Understanding the attributes that are most important to day visitors when selecting a destination, along with how well Durham delivers on those attributes, is important in understanding the way in which Durham can increase the number of day trippers and improve their overall experience.

This study shows that getting good value for the money was the factor most commonly rated as important or very important, with ease of getting around and safety being the next most common.

Day Trippers: Important Attributes in Selecting a Destination



Source: DCVB and D.K. Shifflet (2012)



Note that getting good value for the money is not the same as getting things cheap. In fact, we know from other studies that Durham's visitors tend to be both older and have higher household incomes than both US travelers as a whole and visitors to other destinations in Durham's competitive set.⁶ The most important takeaway is that businesses and organizations should ensure that their price points match the services offered. This is something only individual businesses and organizations can control and impact, and it is the surest way to respond to day trippers' concerns.

Ease of getting around, however, is not within the control of each business and organization. This area is one that is typically addressed by the municipal government. Since ease of getting around affects the way day trippers view Durham – and therefore what they will tell friends and family who may consider a visit – shows that aiding visitors along Durham's sometimes confusing street name changes would be an aid in building future business. This finding suggests that a comprehensive wayfinding system, a high priority of residents in other scientific, generalizable surveys,⁷ would have great benefits for visitors.

How to best implement this information about important attributes is different depending on the type of business or service offered. For DCVB, it informs future projects and focus areas, some of which are mentioned below. Restaurants, museums, and other visitor-centric businesses and organizations can use the information to inform everything from specials to advertising plans to potentially unexplored markets with room for growth.

Main Reasons versus Activities Participated In

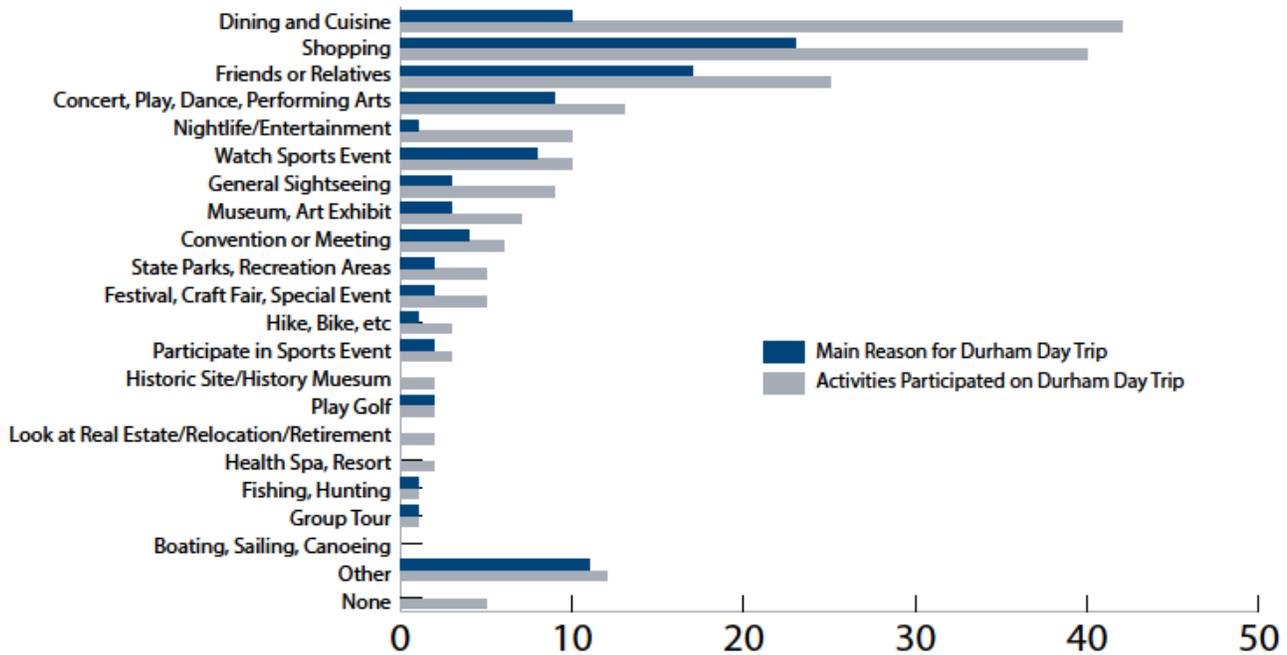
What was the main reason day trippers came to Durham and what did they do while they were here?

Dining, shopping, and friends

When respondents were asked the main reason for their trip, the two most common responses were shopping and visiting friends and relatives, reported by 23% and 17% of respondents respectively. However, many other visitors who came for a different reason also participated in these two activities: 40% of all day trippers shopped and 25% of all day trippers visited friends or relatives. Perhaps unsurprisingly, those who took frequent day trips to Durham were significantly more likely to cite visiting friends and relatives as their main reason for coming than those who took infrequent trips.

The activity most commonly participated in was dining, listed by 42% of day trippers as something they did while in Durham. However, it was only the main reason for visiting for 10% of day trippers. This finding shows that while dining is an area that touches nearly half of day trippers, it is not something which will likely bring day trippers to Durham in the first place. More evidence for this understanding can be seen in the fact that frequent day trippers were significantly more likely to cite dining both as the main reason for a visit and as an activity they participated in (11% and 45%, respectively). Only 4% of infrequent day trippers listed dining as the main reason for their visit, and only 32% dined out at some point in their trip.

Day Trippers: Main Reason vs. Activities Participated in



Source: DCVB and D.K. Shifflet (2012)

Another interesting point is that watching a sporting event was the main reason given by 8% of day trippers and was an activity participated in by 10%. The small gap between these two figures implies that sporting events are not attracting visitors who come for other purposes very often – at least, not as often as shopping, nightlife, and dining.

Overall, though, the responses to these questions show that day trippers to Durham are often doing more than just the thing that provided the impetus for their trip. Such a finding is good news because it means that once visitors get to Durham, they find more to do, leading to increased tax revenues. Additionally, the more Durham can convince day trippers that there is a lot that they want to do in here, the easier it will be to convert their day trips to overnight trips.

Satisfaction

Are Durham day trippers satisfied with their experiences in Durham?

Day trippers are positive

Overall, Durham is doing quite well. Visitors were asked to rate their satisfaction with some of the major features in Durham (like museums, parks, and other visitor-centric sites) on a scale of 1 (very dissatisfied) to 5 (very satisfied). Durham's visitor features averaged 4.13. When asked about some of Durham's districts, the responses averaged 3.94. These findings show that, on the whole, day trippers are happy with what they find in Durham.

But we also know now that finding good value for their money is the most important factor for day trippers. And while the responses were slightly less positive, the results were still comparable: 4.07 for attractions and 3.71 for districts.

We also asked respondents about some individual sites; the responses were by and large quite positive. For example, some organizations received satisfaction ratings as high as 83.3%, 85.9%, and 89.5%. The percentage of respondents satisfied with the value for the money was slightly lower for each organization, but, again, still quite high.

When asked about Durham as a whole, 61% of respondents said they were satisfied or very satisfied with the value for the money they found here. While raising this number is of course a goal, how to do so is not entirely clear because it is not clear why the other 39% are ambivalent or unsatisfied. Three possible explanations are that:

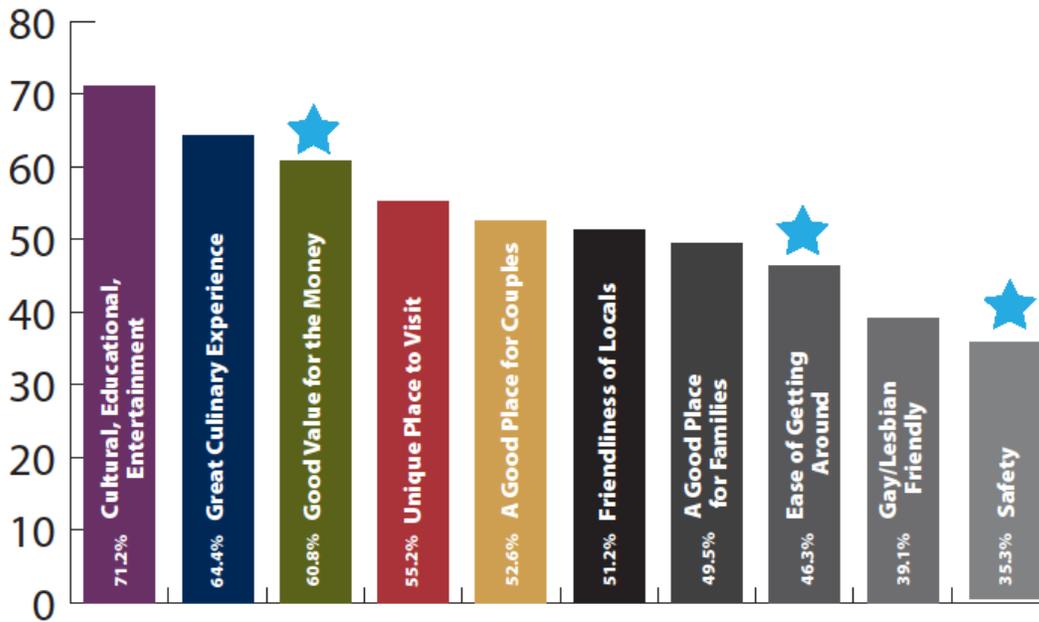
- (1) Day trippers to Durham are not visiting business and organizations that would boost their satisfaction with value for the money. The survey did find that some attractions with satisfaction ratings near 80% or 90% had only been visited by 64%, 53%, and 38% of respondents.
- (2) Visitors are not finding their way to the areas in Durham that appeal to them most. The prevalence of problems with wayfinding (discussed below) gives evidence to this explanation.
- (3) Durham may just pull a large share of visitors from demographics that are harder to please. This survey, and previous studies DCVB has commissioned, gives evidence that groups that make up a larger share of Durham's day trippers than they do in other destinations may tend to give lower satisfaction ratings.

However, none of these explanations is conclusive and how to increase day trippers' satisfaction with value for the money changes depending on which is true. In fact, it may even be that there is little Durham could do, aside from bringing in more visitors from other demographics.

The two biggest target areas for improvement

However, there are some areas in which Durham has room to improve in order to better serve visitors' needs. We will focus on the two biggest visitor concerns that we found in the last part: safety and ease of getting around.

Day Trippers: Durham's Ability to Offer Benefits



 **Biggest Visitor Concerns**

Source: DCVB and D.K. Shifflet (2012)

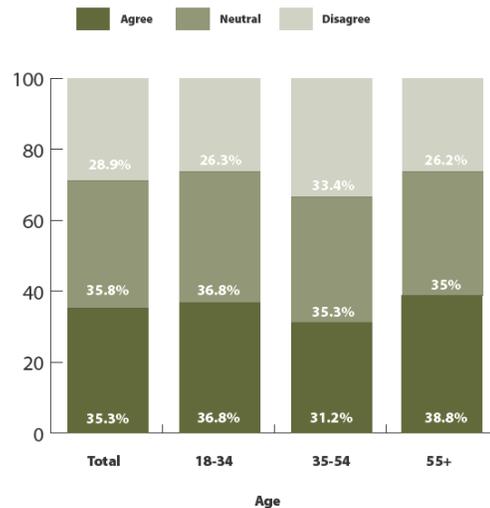


(1) Perception of Safety

First, only 35.3% of day trippers to Durham were satisfied or very satisfied with their feelings about the level of safety in Durham. More telling is that 35.8% were ambivalent about how safe they were here. Such a finding is likely to arise when visitors who had a good experience have also been negatively biased about safety problems by media and word of mouth. These respondents then report feeling ambivalent due to rumors they heard that don't fit with what they actually saw in Durham.

These results likely reflect a perception of safety based on many things other than the actual experience these visitors had on their trip. This fact can be seen when these results are put in context with another report that DCVB compiles annually comparing crime rates between Durham and similar benchmark cities, both nationally and within the Southeast. These reports show that crime in Durham is just about average and has been on a downward trend for the past decade.⁸

Day Trippers: Perception of Safety



Source: DCVB and D.K. Shifflet (2012)



The percentage of people who reported feeling safe while taking a day trip to Durham for personal reasons, at 51%, and for leisure purposes, at 37%, were significantly higher than the percentage of business day trippers who reported feeling safe (25%). In fact, 35.1% of business travelers disagreed or strongly disagreed with the claim that they felt safe.

The number of males who reported feeling safe (37%) and unsafe (27.6%) was not significantly different than females, 33.5% of whom agreed or strongly agreed that they felt safe and 30.2% of whom disagreed or strongly disagreed.

While lowering crime further is certainly still a goal, these findings show that the issue here is more about the perception of crime and of Durham's image than about the reality. And while image is a difficult beast to tackle, Durham's image is becoming more positive every day, especially in the communities these day trippers are coming from.⁹

(2) Ease of getting around

Unfortunately, only 46.5% of day trippers were satisfied or very satisfied with the ease of getting around in Durham. That finding is unsurprising given the lack of a city grid system and the prevalence of roads whose names often change in the middle of heavily trafficked areas.

DCVB has many programs to try and overcome this, such as training for frontline staff and providing direction cards to lodging properties and visitor features to assist them in directing visitors. However, this issue will likely continue until Durham gets serious about a community-wide wayfinding system.

In the meantime, offering the best customer service will go a long way toward minimizing this issue while we continue to advocate for long-term fixes.

Demographics

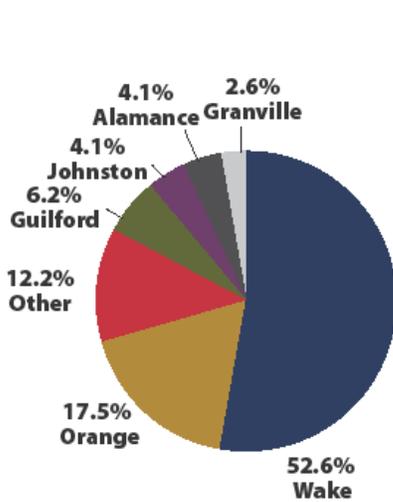
Since our aim is to better communicate with Durham's potential visitors in order to ensure Durham's continued success as a visitor destination and to address the areas in which Durham could improve, it will be helpful to look more closely at who Durham's day trippers are. We will break down the demographics of Durham's day trippers in order to (1) provide information that businesses can use in their own marketing and (2) look for underrepresented markets.

The basic demographics

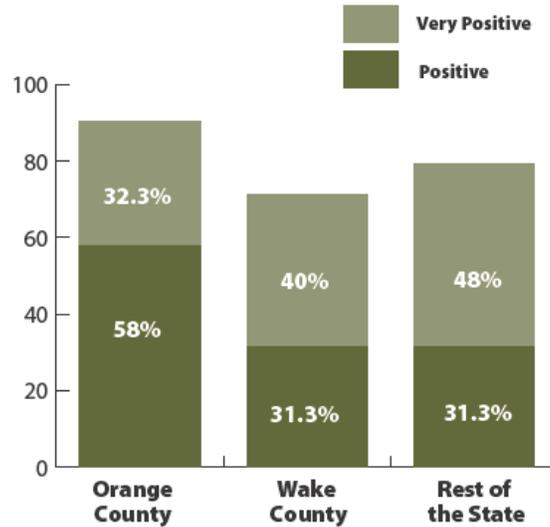
In terms of age, Durham day trippers do not provide many surprises. The most represented age group were the 35-54 year olds, who accounted for 36% of all day trippers, followed by 18-34 year olds at 35%, and 55+ at 29% of all trips.

In terms of income, the proportion of day trippers making less than \$25,000 annually was just about equal to the proportion making more than \$150,000, and almost half made between \$50,000 and \$149,000.

Day Trippers: Durham's Image



Where Day Trippers Come From



Positive Image of Durham

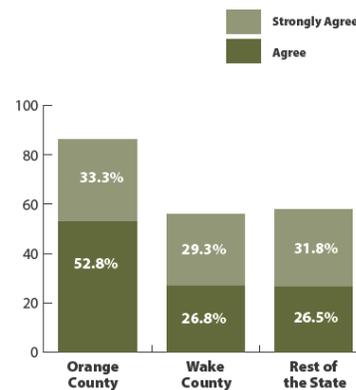
Source: DCVB and D.K. Shifflet (2012)



The breakdown between these two counties is especially interesting given the results from a separate survey DCVB commissions annually concerning Durham's image. That study found that Orange County day trippers have a more positive image of Durham and is much more likely to think highly of Durham as a visitor destination. In fact, almost 30% of Wake County day trippers said they would *not* consider Durham a favorable visitor destination.¹⁰

The fact that Wake County day trippers are less positive and yet visit more often needs comment. Much of that difference is probably because of Wake County's population size – it is seven times the size of Orange County, but provides three times the number of visitors, so Orange County is actually the source of more day trips per capita.

Day Trippers: Durham as a Favorable Destination



Source: DCVB and D.K. Shifflet (2012)



A related fact is that Durham County is the closest major shopping destination to Orange County, and thus is a natural draw. Because Wake County has Raleigh and the surrounding areas, the draw to Durham is lessened. It is more difficult to explain Durham’s benefit to Wake County because they have more competitive resources. This point means that finding a way to articulate Durham’s relative benefit for Wake County residents – what it has that Wake County does not – could greatly boost visitation. But it also means that it will be more difficult to draw more visitors from Wake County, and could prove not to be cost effective.

Who didn’t come

One way to attract more day trippers to Durham is to look at the reasons why potential visitors did not come and see if their concerns are ones that can easily be addressed. As part of this survey, respondents who had not made a day trip to Durham were asked their reasons for staying away.

Generally speaking, most of what is on this list are things that neither DCVB nor individual businesses and organizations in Durham can impact.

Other obligations

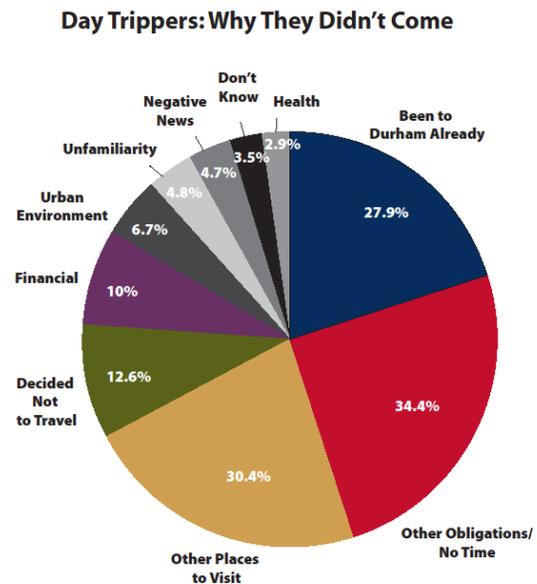
Unlike those who said they could not afford to travel or decided to stay at home, the 34% of potential day trippers who said they had no time or more pressing obligations are implying that they would like to come to Durham but just cannot quite work out how they can do so. In other words, taking a day trip to Durham is already on their list of things to do – it is just behind other things. These individuals are not a cost-effective market segment to try to attract.

Other places to visit

The group that claimed they had other places to visit is very similar to the ones who had other obligations. Their response implies that they would have visited Durham, only there was another destination which appealed to them more. Durham is very possibly on the list of places to see once again – it is just not close enough to the top. Typically, this suggests that they have less familiarity with the destination, which is something DCVB is addressing through its marketing programs.

Been to Durham too many times

One of the areas in which DCVB can have the most success is with the 28% who said they work in Durham or had been too many times to make another day trip. This group is especially important given



Source: DCVB and D.K. Shifflet (2012)



the high number of people who work in Durham and live in other counties – over 110,000 in our last count (and 50,000 from Wake County, which is interesting concerning the findings from Part 5).¹¹

What needs to be communicated to this group is how much more there is to see in Durham. With special events and performances happening on an almost daily basis, with pop-up shops and new restaurants coming regularly, with the continual spirit of innovation here, there is more than enough to make regular trips to Durham worthwhile. Moreover, the fact that so many of these people are in Durham every day for work means that highlighting these developments is easily within our reach.

Other reasons

Some of the respondents – such as those who said they decided not to travel anywhere and those who claimed financial reasons kept them away – could possibly be persuaded if they knew of some of the cheaper options that are available in Durham. But it is also quite likely that they could not afford to travel at all or could not afford a trip in addition to one they had already committed to. It is also probable that as the economy improves, this segment will become smaller.

Refining the message

The takeaway from all of the information presented here all comes down to communication. By better understanding these factors, the audience, and the audience's desires, we can craft pointed messages to clearly and persuasively explain the benefits of a trip to Durham. How individual businesses and organizations are able to utilize this information will vary depending on who their core customer base is, their location, and the product offered. But all Durham business can learn something from these findings which can inform how and to whom their marketing is directed.

¹ Durham Convention & Visitors Bureau and D.K. Shifflet, *2012 Volume Estimates*.

² The study was completed by online survey. Participants were 18 years or older and had taken a day trip to Durham in the past month. The study factored out both commuters who traveled to Durham to work and students who were attending classes at Durham schools and universities, unless these individuals made an explicit effort to stay or come back to Durham for leisure purposes. Surveys were completed each month throughout 2011 and responses were weighted demographically to represent the day trip population. A quota of at least 50 completed surveys was aimed for each month – the final report included 1,248 respondents.

³ Durham Convention & Visitors Bureau and D.K. Shifflet, *2012 Volume Estimates*.

⁴ Durham Convention & Visitors Bureau and D.K. Shifflet, *2012 Durham Volume Estimates*.

⁵ Durham Convention & Visitors Bureau, *24 Year Durham NC Scorecard*, accessed January 30, 2014, http://www.durham-nc.com/images/visitor_research_stat/fullsize//dcvb-scorecard-1989-2012.pdf

⁶ Durham Convention & Visitors Bureau and D.K. Shifflet, *2008-2010 Visitor Profile*.

⁷ Durham Convention & Visitors Bureau and NanoPhrades, *Image Study, 2006-2013*.

⁸ Durham Convention & Visitors Bureau, *2012 Durham Crime Comparative*, accessed January 30, 2014, http://www.durham-nc.com/images/visitor_research_stat/fullsize//2012_Crime_Comparative.pdf

⁹ Durham Convention & Visitors Bureau and NanoPhrades, *Percentage of People in Wake and Orange Counties with a Positive Image of Durham*, accessed January 30, 2014, http://www.durham-nc.com/images/visitor_research_stat/fullsize//image_wake_orange11-2.pdf

¹⁰ Durham Convention & Visitors Bureau and NanoPhrades, *2012 Image Survey*.

¹¹ Durham Convention & Visitors Bureau, *Durham is a Job Engine for the Entire Region*, accessed January 30, 2014,