CAL U
Tourism Research Center
CALIFORNIA UNIVERSITY OF PENNSYLVANIA

2014 Gettysburg Intercept Visitor Survey
Summary Report

Submitted June 2015 by:
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Cal U Tourism Research Center

Professor Sean Hayes, Contributing Faculty Member, Statistics Specialist

Submitted to:
Mr. Norris Flowers, President
Destination Gettysburg
The official destination marketing organization for Gettysburg and Adams County, Pennsylvania.

California University of Pennsylvania is an affiliate member of the World Tourism Organization Education Council, which is compromised of worldwide leading tourism education institutions.

Introduction

The following report summarizes findings from the 2014 Gettysburg Visitor Study conducted by Dr. Susan Ryan and a study team from California University of Pennsylvania's Tourism Research Center.

The Gettysburg Intercept Project was initiated in the fall of 2006. Previous report submissions include the 2007–2013 Gettysburg Intercept Survey Summary Reports. This report presents a summary of the 2014 visitation year for Gettysburg, Pennsylvania.

The 2014 report summary includes demographics, trip characteristics, destination choice resources, spending estimates, and trip experience and satisfaction ratings. In addition to the narrative sections that comprise most of this report, Appendix A contains summarizing tables for reference and review.

It is the expectation of the 2014 Study Team that these results will assist Destination Gettysburg in promoting Gettysburg as a premier travel destination for the betterment of the community, Bureau members, and Gettysburg visitors.

The 2014 Study Team

Study Team members for 2014 include Angelique Holmes and Katelyn Klenk as Lead Fieldworkers. Other Project and Research Specialists for the 2014 visitor year included Richard Bolinger, Shannon Eagan, Samantha Jenkins, Allison Ruber, and Erin Scanlon. All Project and Research Specialists were also majors in the Bachelor of Arts in Geography: Tourism Studies Program at California University of Pennsylvania (see Figures 1 and 11). Jacquelyn Pierce served as the GIS Specialist for this report. Professor Sean Hayes continued with this now longitudinal study as a Contributing Faculty Member, Statistics Specialist, and Report Co-author.

Appropriate on-site permissions were obtained for the 2014 study year. As in prior years, the study team established approval of the Gettysburg Intercept Survey through the California University of Pennsylvania Institutional Review Board for the ethical treatment of human subjects in research (see Appendix B).

Surveys were conducted throughout the destination of Gettysburg. Survey locations included:

- American Civil War Wax Museum;
- Devil's Den;
- East Cemetery Hill and Culp's Hill ;
- Eternal Light Peace Light Memorial;
- High Water Mark Monument;
- Intersection of Baltimore St. and Steinwehr Ave.;

- Lincoln Square;
- Little Round Top Monument;
- National Park's Service Visitor's Center;
- Outlet Shoppes at Gettysburg; and,
- The Pennsylvania State Memorial.

The information obtained in the survey was analyzed using Techneos Entryware and Statistical Package for the Social Sciences. The following sections summarize the results of the 2014 Gettysburg Visitor Study. This study represents all 2014 tourist seasons in geographically representative locations throughout the destination. Furthermore, the data represent visitors of all types to Gettysburg including those that stay for less than one day and those that stay multiple nights. The 2014 database, consisting of 959 useable responses, was analyzed and the results were compiled for this report.

Figure 1 Cal U Students at work in the Cal U Tourism Research Center in Eberly Hall 261, California University of PA.

Analysis for 2014

From 2010 on, the study team has used an approach that applies simple methods to produce quality results and reduce error probability. One way that this is accomplished is through a more frequent use of median as a central tendency measure (mean/average, median, and mode are measures of central tendency). Median describes the middle value in a dataset, meaning that approximately half the values within the set are positioned above and below the calculated median number. By using median as a measure of central tendency the need to remove outliers (extremely high or low values that are rare within a group of data) is eliminated.

As in previous reports, the 2014 summary report includes a categorization method for some of the figures. The figures present some variables using a natural breaks categorization method. Natural break category figures can prevent the misrepresentation of data for situations in which one single number cannot adequately describe a group of visitor responses. Both median values and natural break figures are presented for some variables within this report to provide an in-depth examination of visitor behavior.

Explanation for Use of Median

Median is appropriate when data have one mode (most common value), but are not normally distributed (a normal distribution would approximate a bell-shaped curve). When there are many low values or high values in a dataset, the distribution of values does not approximate a curve that is considered normal (statistically). In cases where the data are normally distributed (for example, visitor *age*), an average describes the entire set in an acceptable manner. Average values tend to be less than optimal when a group of responses contains rare and abnormally high values, as is the case with many Gettysburg Intercept Survey variables.

Prior year reports sometimes described visitor group responses in averages. In some cases, it has been determined that median is a more appropriate descriptive method. In cases where a new descriptive technique has been applied, the value for each past year has been calculated and included for comparison (see Appendix A).

Explanation for Natural Breaks Figures

Another phenomenon that occasionally occurs within data is the presence of more than one most common value (also called *mode*). For example, if 10% of visitors report a total spending estimate of $100 and a separate 10% report a total spending estimate of $200, then the distribution can be considered non-normal and bimodal. In situations such as the aforementioned example, a single summarizing value (such as median or average) can misrepresent a large portion of visitor group information.

In theory, multiple modes could indicate the presence of multiple subpopulations within the primary population of interest. For example, the total Gettysburg Visitor Population might consist of two primary total spending subpopulations. One of these subpopulations might possess spending habits that would approximate a $100 total spending estimate, while the other subpopulation would possess spending habits that would approximate a $200 total spending estimate. To address this challenge, the 2014 summary of Gettysburg Visitors (and several prior years) makes use of natural breaks categorical figures to describe non-normal and multimodal data. Natural breaks categories are established using the top-ranked visitor values as separation points in the data. This method results in a visual representation of non-normal multimodal data that is more inclusive and presumably more useful than central tendency measures alone. Although natural breaks is the primary method for analyzing non-normal multimodal variables, median is provided for some of these variables as a reference to compare to past study years.

While using averages to describe *spending estimates* has been determined to be less than optimal, spending estimate averages are included in Appendix A. However, the research study team has determined that *average values are highly volatile with respect to spending estimates* and thus, average spending figures should be used cautiously in the decision-making process. When extremely high values are present in a dataset, an average can represent the extreme scores more than the majority of the dataset. Charts such as those included in the spending estimates section of this report describe spending practices of the survey group more completely than single values like averages can (refer to Figures 16 through 20).

Visitors to Gettysburg in 2014

Demographic Information

The following section summarizes the key demographic characteristics of visitors to Gettysburg in 2014. These include visitor point of origin, age, education, income, and gender.

Visitor Point of Origin

In order to represent tourist visitation accurately, the study team defined a geographical threshold surrounding Gettysburg. Thus, respondents within a twenty-mile threshold of Gettysburg were not included in the survey. These visitors would be considered local visitors (or recreationalists), which would not meet the definition of tourists with respect to the informational needs of Destination Gettysburg (see Figure 2). While the industry standard is a fifty-mile threshold from usual places of work or home, the unique geographical and market characteristics of Gettysburg were taken into account in the delineation of a twently-mile threshold.

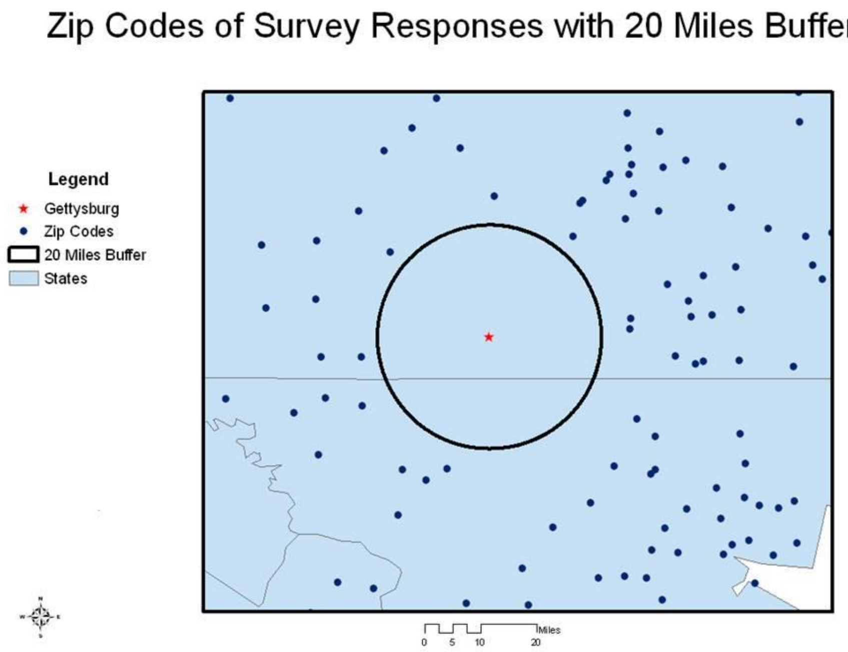


Figure 2

The majority of visitors to Gettysburg in 2014 were from the United States (95.8%; a 1.7% decrease from 2013). The most frequent domestic states of origin were Pennsylvania, Maryland, Virginia, and Ohio (Figures 3, 4, and 5).

Gettysburg did experience international visitation (4.2%); however, the rates of international visitation were relatively low. Each international point of origin occurred with a frequency rate below 1.5%. Over the past 8 years of data, the median rate of international visitation to Gettysburg is 2.7%. For the past 8 years, international visitation has never exceeded 4.2% (occurring in 2014) and it has never been lower than 1.5%. Overall, visitor point of origin data has remained relatively stable over the 8-year life of the survey.

Age

The average age of visitors to Gettysburg was 53 (no change from 2013). Ages ranged from 18 to 87 in 2014. The distribution of age approximates a normal curve in this sample and, thus, the average age value adequately describes visitor age. Median age over the 8-year life of the survey is 51 years.

As in prior years, ethical constraints do not allow the study team to survey respondents under 18 years of age. Therefore, this study does not include characteristics of visitors under this age.

Education
Visitors were also asked about educational attainment. 61.8% indicated the achievement of at least a Bachelor's Degree (2.0% decrease from 2013). 27.1% of visitors claim to have completed some college or an Associate's Degree (1.4% increase from 2013). 88.9% of visitors claim to have pursued some form of post-secondary education (0.6% decrease from 2013). Table 1 displays the visitors' educational attainment distribution for 2014.

Throughout the life of the Gettysburg Intercept Survey, visitors with some college have always outnumbered visitors with no college. Median values for the prior seven years of data across education level categories are listed in Table 1 for comparison.

Level of Education	Percentage of 2013 Respondents	Median % of Prior Seven Years
Bachelor's Degree	**38.6%**	**32.8%**
Graduate or Professional Degree	**23.2%**	**25.0%**
Some College (no degree)	**17.1%**	**15.7%**
Associates Degree	**10.0%**	**14.5%**
High School Diploma	**9.8%**	**12.1%**
Some High School (no diploma)	**0.8%**	**0.8%**
Less than 9^{th} Grade	**0.6%**	**0.2%**

Table 1

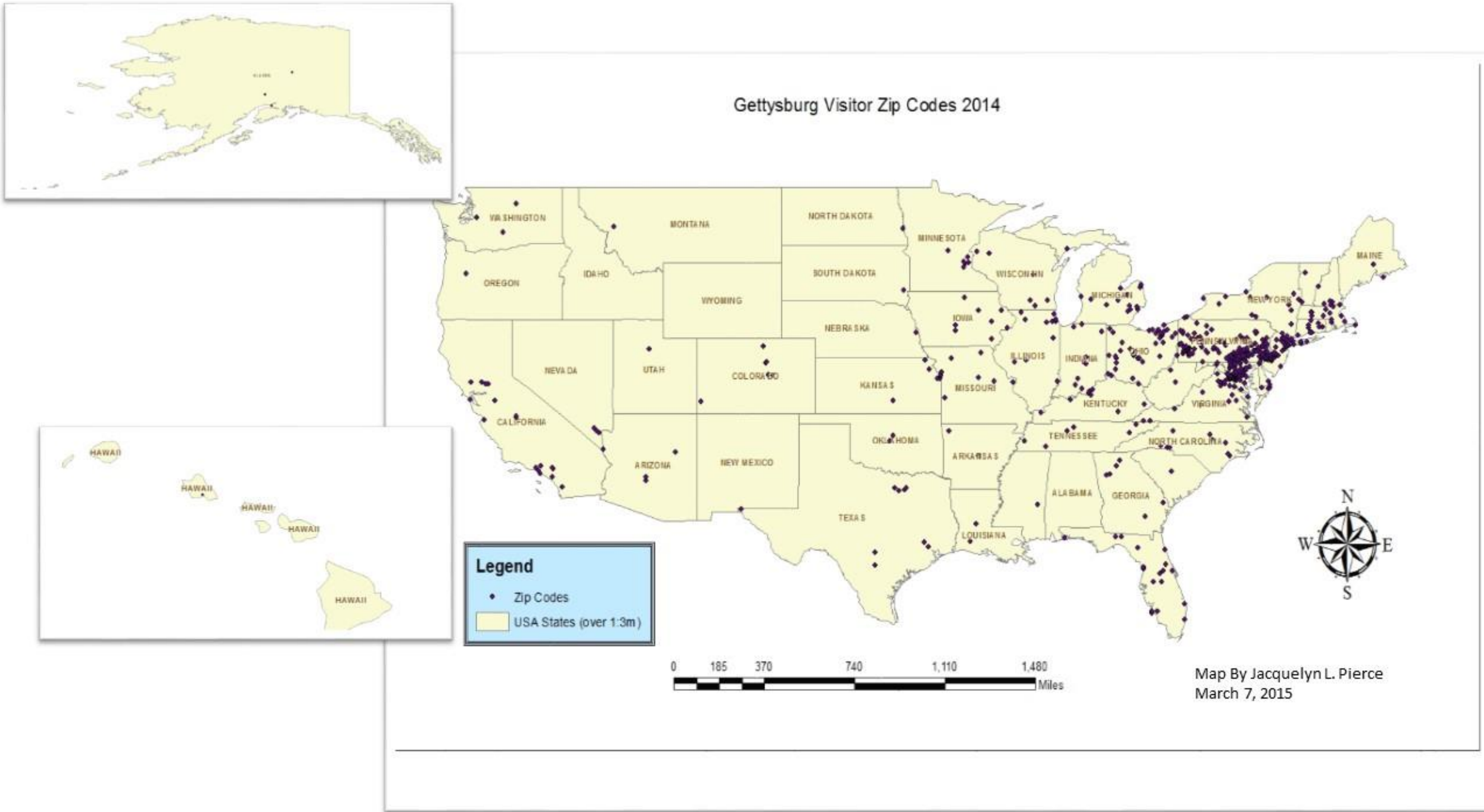
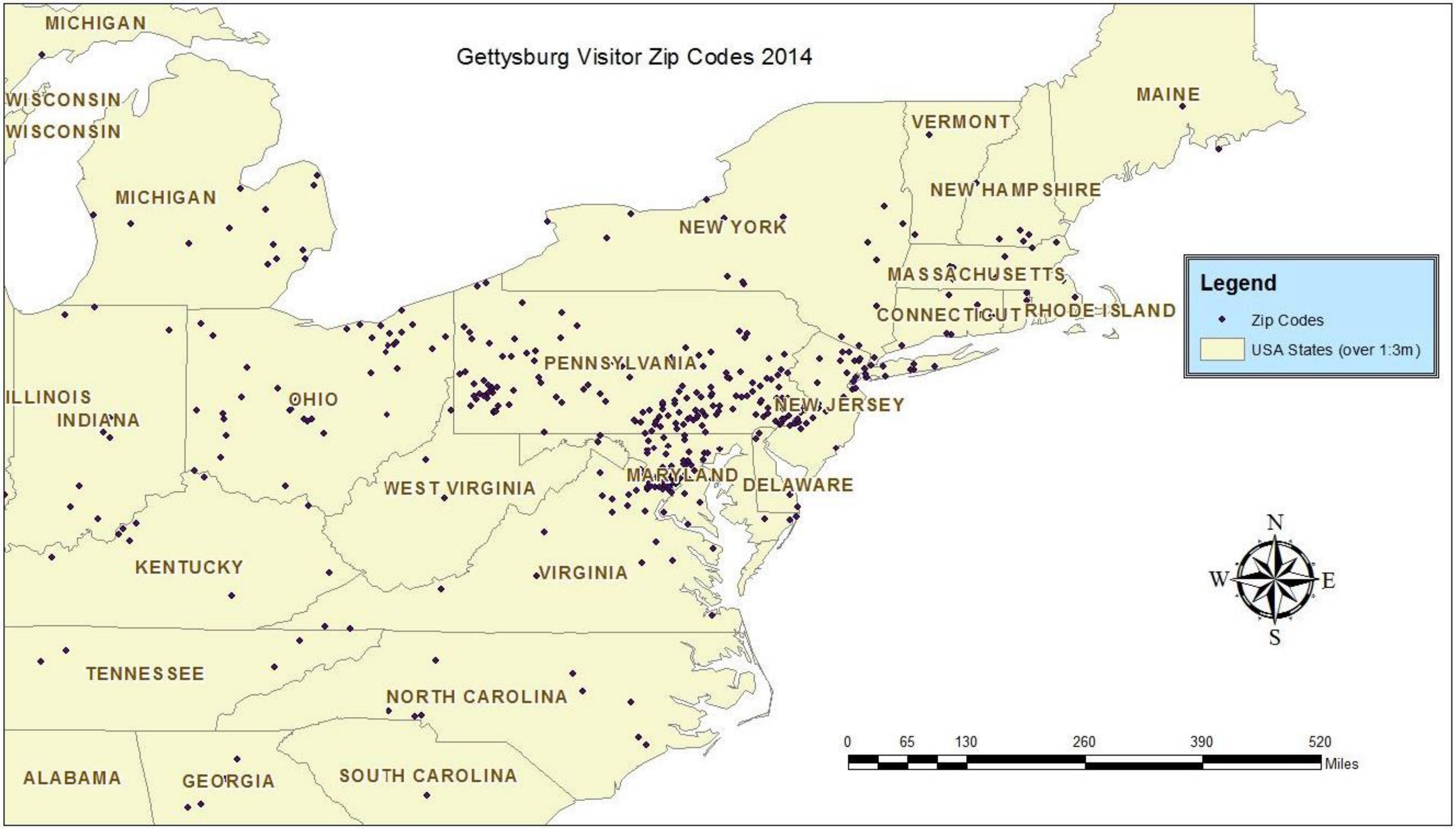

Gettysburg Visitor Zip Codes 2014
WASHINGTON
OREGON
CALIFORNIA
NEVADA
IDAHO
MONTANA
WYOMING
UTAH
ARIZONA
COLORADO
NEW MEXICO
NORTH DAKOTA
SOUTH DAKOTA
NEBRASKA
KANSAS
OKLAHOMA
TEXAS
MINNESOTA
IOWA
MISSOURI
ARKANSAS
LOUISIANA
WISCONSIN
ILLINOIS
MICHIGAN
INDIANA
OHIO
KENTUCKY
TENNESSEE
ALABAMA
GEORGIA
NORTH CAROLINA
VIRGINIA
PENNSYLVANIA
NEW YORK
MAINE
HAWAII
Legend
Zip Codes
USA States (over 1:3m)
0
185
370
740
1,110
1,480
Miles
N
S
E
W
Map By Jacquelyn L. Pierce
March 7, 2015

Figure 3


Gettysburg Visitor Zip Codes 2014
MICHIGAN
WISCONSIN
WISCONSIN
MICHIGAN
ILLINOIS
INDIANA
OHIO
KENTUCKY
TENNESSEE
ALABAMA
GEORGIA
SOUTH CAROLINA
NORTH CAROLINA
VIRGINIA
WEST VIRGINIA
MARYLAND
DELAWARE
NEW JERSEY
PENNSYLVANIA
NEW YORK
CONNECTICUT
RHODE ISLAND
MASSACHUSETTS
NEW HAMPSHIRE
VERMONT
MAINE
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Zip Codes
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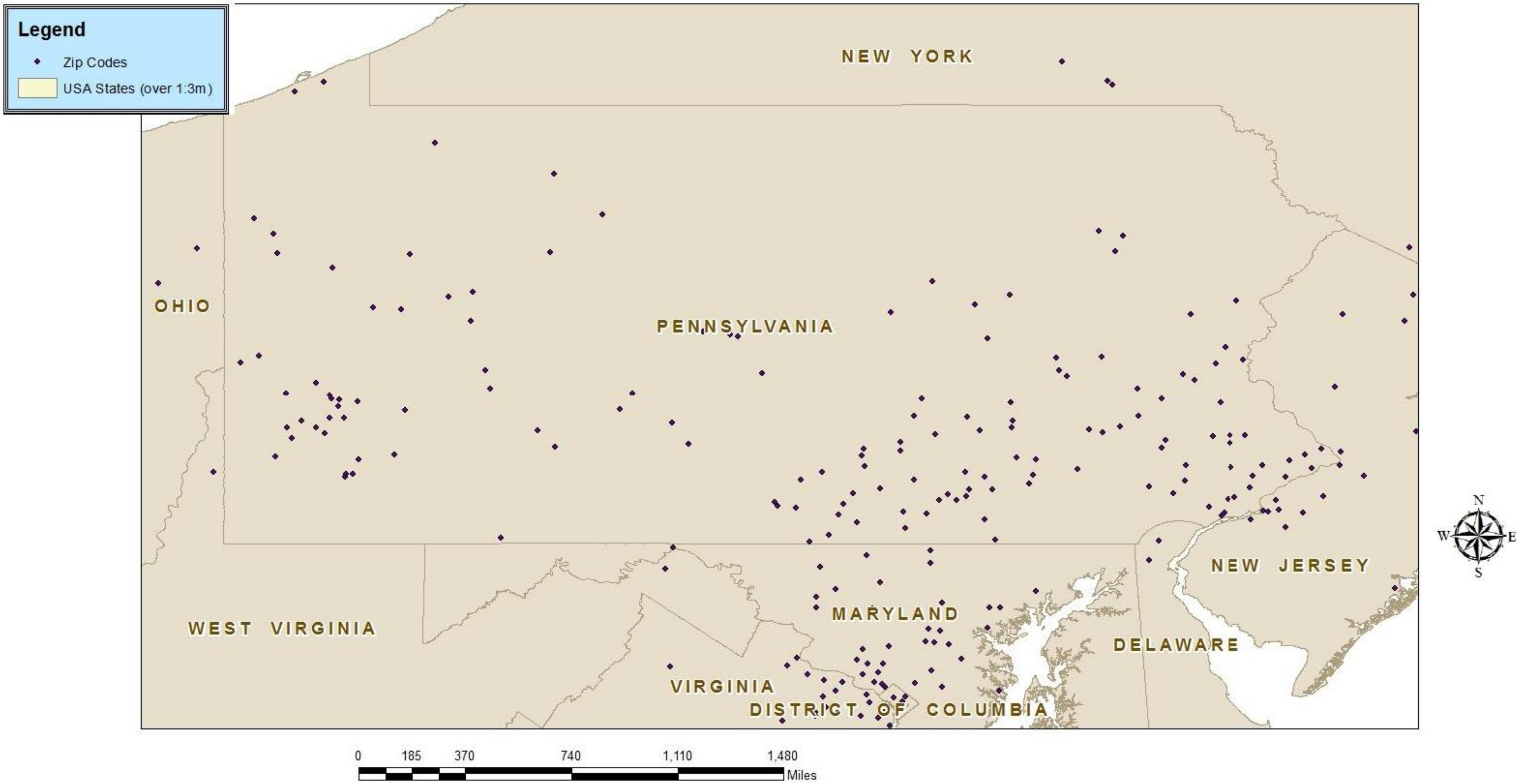
390
520
Miles

Figure 4


Legend
Zip Codes
USA States (over 1:3m)
NEW YORK
OHIO
PENNSYLVANIA
NEW JERSEY
WEST VIRGINIA
MARYLAND
DELAWARE
VIRGINIA
DISTRICT OF COLUMBIA
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370
740
1,110
1,480
Miles

Figure 5

Income
In 2014, 13.7% of visitors to Gettysburg reported a total annual income ranging of $75,000-$99,999 (no change from last year). Another 13.7% of visitors reported an annual income of $100,000-$124,999, which is a slight increase for this income category (see Table 2). 12.2% reported an annual income of $60,000-$74,999, a slight decrease of 0.5%. With respect to larger categories, the $50,000 to $99,999 income group represents 36.8% of visitors (slightly more than in 2013). Furthermore, 29.9% reported an income range from $100,000-$199,999 (almost the same as in 2013). 8.2% of respondents reported an income range in excess of $200,000 (a 3.5% decrease from 2013). 28.3% reported income less than $50,000 (6.2% increase from 2013).

Over the seven years of data, the $50,000-$59,999 income category has registered a higher response rate than all other categories (14.5% was the median value across all seven prior years of data, with this year of data added in the median falls only slightly to 14.3%, which is still the leading category across all years). The $75,000-$99,999 income category ranked second over the past seven years with a median value of 13.7% (with this year of data the value remains at 13.7%). The third category over the past seven years is the $60,000-$74,999 category (with this year of data the median value falls only slightly to 13.1%; still third over the life of the survey). Table 2 compares the current year value to the median value of all previous study years.

Income Range	Percentage of 2014 Respondents	Median Value for this Category Over Prior 7 Years
$75,000-$99,999	13.7%	13.7%
$100,000-$124,999	13.7%	11.9%
$60,000-$74,999	12.2%	13.5%
$50,000-$59,999	10.9%	14.5%
$40,000-$49,999	9.1%	12.3%
$125,000-$149,999	8.4%	5.3%
$150,000-$199,999	7.8%	5.1%
Less than $10,000	6.3%	1.9%
$30,000-$39,999	5.8%	5.9%
$200,000 or more	5.0%	4.9%
$20,000-$29,999	4.6%	9.3%
$10,000-$19,999	2.5%	2.5%

Table 2

Gender
Information regarding gender characteristics of visitors was also gathered (see Figure 6). In 2014, 51.2% of respondents were male (a 2.9% decrease from 2013). 48.8% of respondents were female (a 2.9% increase from last year). Over eight years of data, females have outnumbered males slightly in most years (51.5% median for females versus 48.5% median for males).

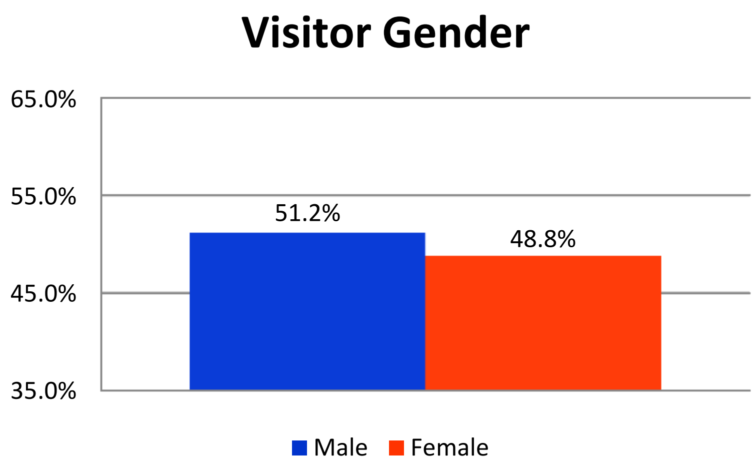

Figure 6

Trip Characteristics

The following section reports results from the 2014 Visitor Study that questioned the characteristics of the visitor's current trip. These included repeat visitation, purpose of visit, primary destination choices, length of stay, party composition, and group size.

Repeat Visitation

Gettysburg continues to experience moderate to high levels of repeat visitation. In 2014, Gettysburg experienced a slight increase in first time visitors compared to last year. When asked if this was the respondent's first trip to Gettysburg, 53.8% indicated that it was not (a 5.0% decrease from 2013). 46.2% indicated it was their first visit (an increase of 5.0%; see Figure 7).

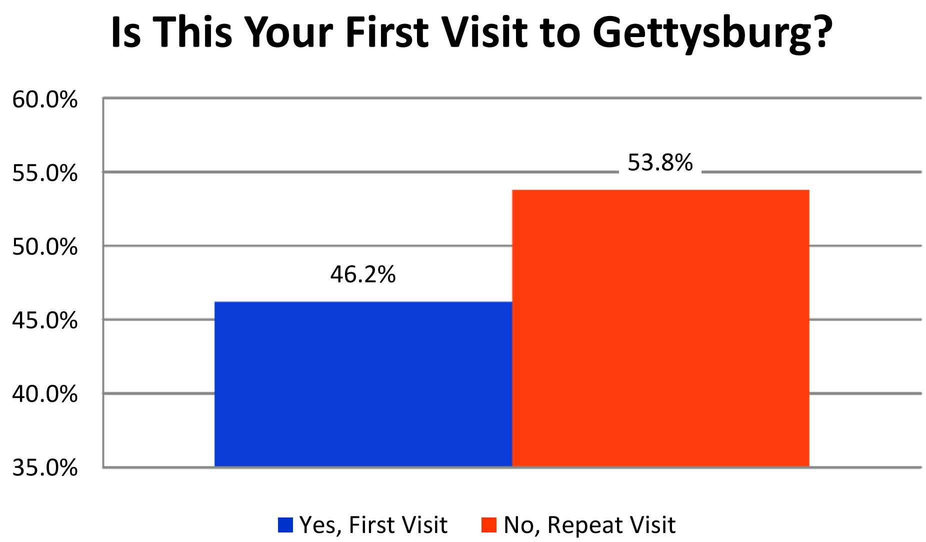

Figure 7

Number of Previous Trips

For this survey question, the responses were highly variable meaning that values tended to vary considerably from one to the next. When this and other statistical conditions are present, median can be a more effective method for describing an entire group of respondents. In 2014, the median number of previous trips to Gettysburg was 4.00 (an increase of 1.00 trip compared to 2013). Table 3 displays number of previous trips categorically.

Previous Visits to Gettysburg	Percentage of Respondents
1 to 5 Previous Visits	**65.7%**
6 to 10 Previous Visits	**12.4%**
11 to 20 Previous Visits	**13.4%**
21 to 100 Previous Visits	**7.9%**
101 or more Previous Visits	**0.6%**

Table 3

Purpose of visit

Although visitors may be motivated by multiple trip purposes, respondents were asked to identify the primary purpose of their visit. The majority of visitors in 2014 traveled to Gettysburg for the primary purpose of pleasure. Visitors also indicated traveling to visit friends and relatives (VFR) and business travel (see Figure 8). In comparison to 2013, business as a trip motivator increased to 5.6%; an increase of 1.7% (business visitation has remained fairly stable over the past eight years centering around 4.5%). Visiting friends and relatives is variable ranging from 2.0% to 11.3% over the past eight years with an 8-year median value of 7.5%. Visiting friends and relatives was reported in 11.3% of 2014 cases. In 2014, pleasure as a trip motivator was reported by 83.1% of respondents (a decrease of 4.1%). The 8-year median for pleasure as a trip motivator is 87.7%.

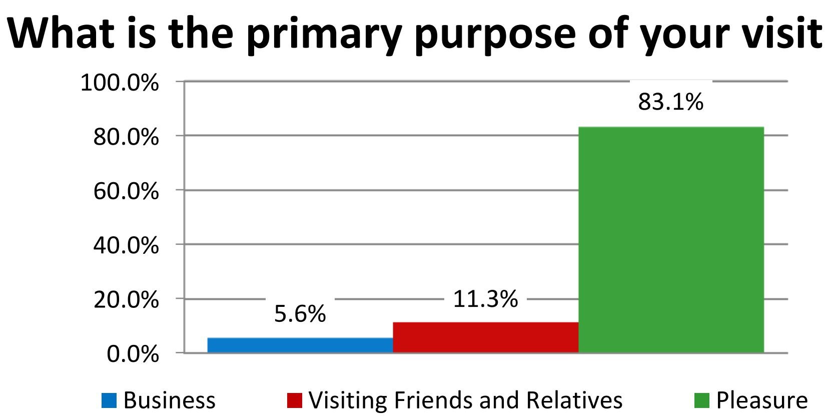

Figure 8

When visitors were questioned about their primary destination, 84.5% indicated that Gettysburg was the primary destination (a 5.5% increase from 2013). 13.7% indicated Gettysburg was one of several destinations (a 3.3% decrease from 2013). 1.8% indicated that Gettysburg was not a planned destination (a decrease of 2.2% from 2013; see Figure 9).

Over the past eight years, Gettysburg has been the primary destination for most visitors. The median value for visitors claiming Gettysburg as their primary destination is 84.1% across all eight years. Gettysburg as one of several destinations was reported with a median value of 13.0% across all eight years. Those reporting that Gettysburg was not a planned destination occurred with a median value of 3.8% over the life of the survey.

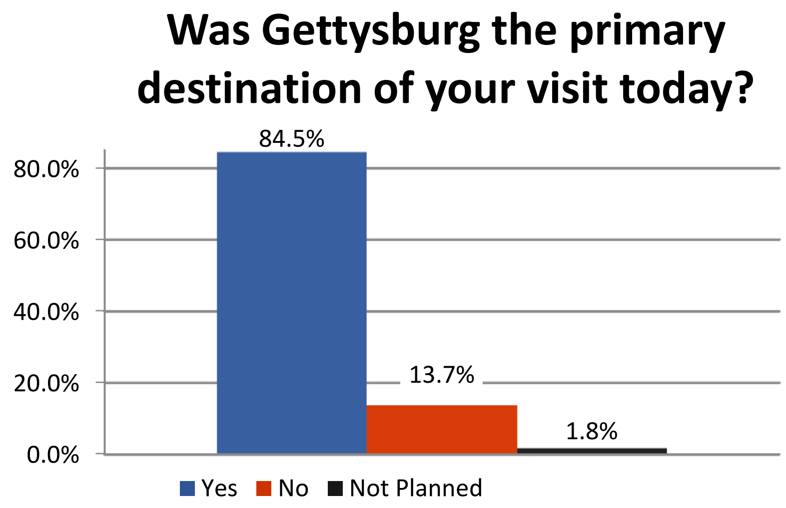

Figure 9

Respondents who did not intend to visit Gettysburg as a primary destination were asked to identify a destination they considered primary, within the course of their trip. Within this group of respondents, the most commonly identified destinations were within the state of Pennsylvania. Popular destination *regions* for visitors whose primary destination was not Gettysburg included Washington D.C., other Pennsylvania cities, and various other destinations along the United States East Coast. The most commonly identified destination city was Washington D.C. (the same as in 2013; see Figure 10).

As noted in prior years, the data appear to infer that 2014 visitors not identifying Gettysburg as a primary destination may choose to visit Gettysburg because transportation routes make it convenient to do so. Thus, the major transportation routes that surround Gettysburg (Interstates 81, 83, 70, and 76) may be worthy marketing targets.

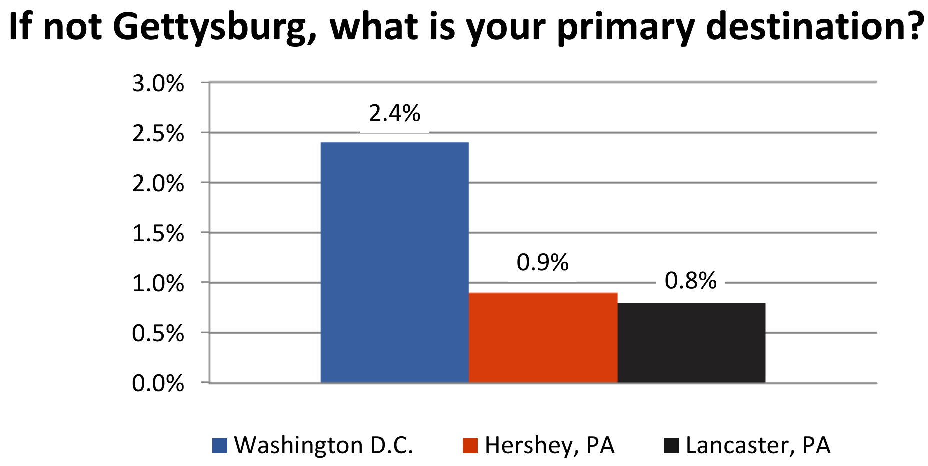

Figure 10

Figure 11 Katelyn Klenk surveys a visitor at Little Round Top

Length of Stay
Visitors were also questioned about length of stay. In 2014, most visitors intended to stay in Gettysburg for *one day or less* (50.4%; a 10.1% increase from 2013). Another group of visitors indicated that they would be staying *more than one night* (34.8%; a 1.1% increase from 2013). 14.8% were planning to stay one night (a 9.5% increase from 2013).

In 2014, day trips were most common, while the most common length of stay *for those staying overnight* was 2.00 nights (an unprecedented increase of 1.00 night). The most reliable central tendency measure for describing trip duration is the median (because the distribution of responses is not normal from a statistical perspective).

Recent measures indicate that median trip duration has increased from 1.00 night in past years to 2.00 nights in 2014. This year is the only study year out of eight that median trip duration has not been 1.00 night. This could indicate that overnight Gettysburg visitors are choosing to stay longer. It is also important to note that day trips increased considerably this year (10.1%). Similar results in future study years will be necessary to claim with confidence that Gettysburg visitor length of stay has increased. Even so, median does not shift easily, which clearly indicates a set of responses dissimilar to those from prior years for this variable. Figure 12 presents Trip Duration Estimates.

In past years, average length of stay was calculated to describe this variable; however, in the third year of study, the study team determined that average was not ideal. Since average was presented in past years, it (1.19 days) is listed below the median value in Appendix A, for your review.

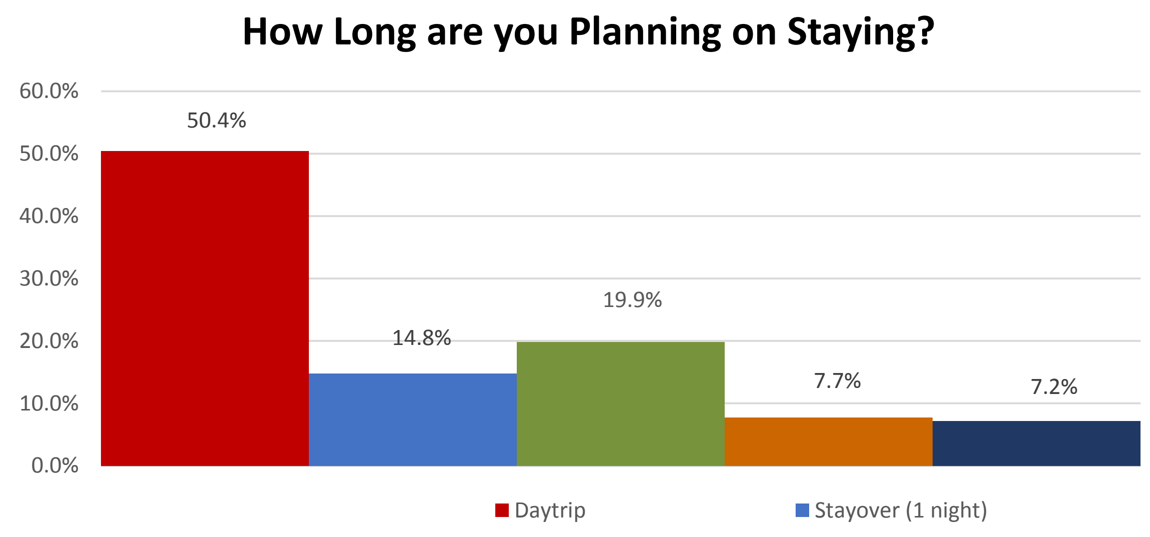

Figure 12

Length of Stay	Current Year 2014	Median Value for this Category for Prior 7 Years
Day trip	**50.4%**	**43.4%**
Stayover (1 night)	**14.8%**	**21.0%**
Stayover (2 nights)	**19.9%**	**17.3%**
Stayover (3 nights)	**7.7%**	**8.5%**
Stayover (More than 3 nights)	**7.2%**	**8.1%**

Table 4

Visitors were also asked about Gettysburg accommodations. Of those who provided information about accommodation practices, the majority indicated a hotel or motel as their accommodation choice (72.7%; an increase of 6.4% from 2013). Campground as an accommodation was selected with a frequency of 11.3% (a 0.2% increase from 2013). Bed and breakfast as an accommodation decreased to a 6.8% selection frequency (decreasing by 10.4% compared to 2013). Staying with friends or family increased to 6.8% (see Figure 13).

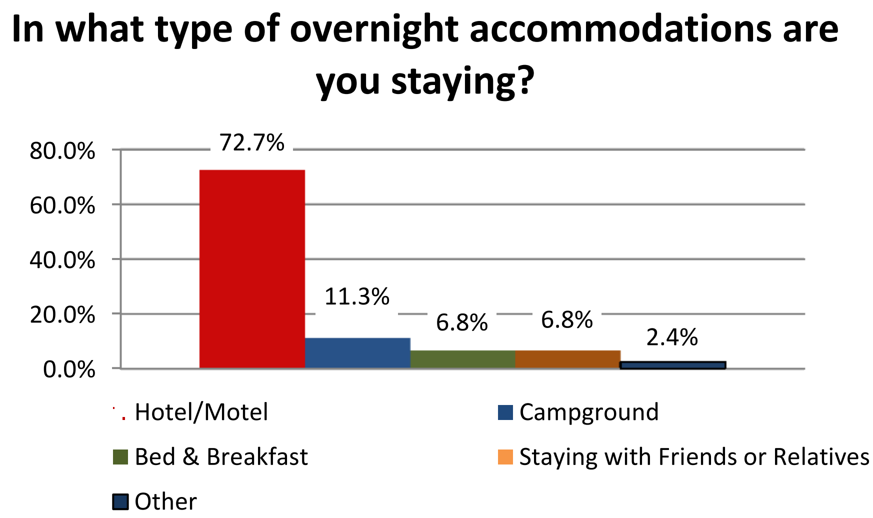

Figure 13

Party Composition

Visitors were asked, "How many people, including yourself, are traveling with you on your current trip?" For this variable, most responses indicated less than 10 group members per group (94.4%). In the earlier years of this survey, lower category values only revealed that most visitor groups contain low numbers of visitors. For an improved view of group composition, categorical representations of groups have been adjusted to reflect the distribution of group size in a more specific manner.

The most common group consisted of *two* visitors (39.7%; 2.00 is the mode for this variable). Groups consisting of two visitors have been most common over the past eight years of data. Visitor groups composed of *four* people were second most common in 2014 (17.2%; a 6.3% increase from last year). Groups consisting of *three* people were found in 15.8% of cases (no change from last year). In the 2013 Gettysburg Intercept (last year's report), groups of three overtook groups of four as the second most common group size. This appears to have been a one-year anomaly since groups of four has reclaimed second place this year. Figure 14 visually presents party size frequencies categorically. Group size for the current year is compared to the median value of the prior seven years in Table 5.

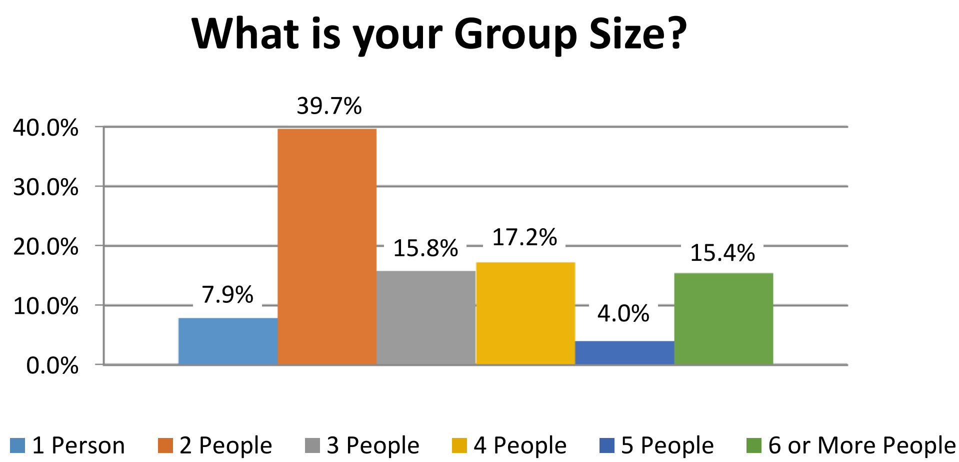

Figure 14

Group Size	Current Year 2014	Median Value for this Category for 7 Prior Years
1 Person	**7.9%**	**6.8%**
2 People	**39.7%**	**44.2%**
3 People	**15.8%**	**14.6%**
4 People	**17.2%**	**14.9%**
5 People	**4.0%**	**6.0%**
6 or More People	**15.4%**	**12.8%**

Table 5

In 2014, 72.7% of visitor groups consisted of 2, 3, or 4 individual visitors (down 6.8% from last year). In 2014, the majority of visitor groups included children. Groups with children increased to 58.8% this year (a 10.0% increase from 2013). *Of the visitor groups with children*, 76.0% included 1 or 2 children within the group (increasing by 1.0% in 2014). Note that the median for prior years only includes data for six prior years. This is because the study did not consider groups with or without children in 2007.

Children or No Children	Current Year 2014	Median Value for this Category for Prior Six Years
Groups with at least 1 Child	**58.8%**	**34.0%**
Groups without Children	**41.2%**	**66.0%**

Table 6

The data from 2014 appear to indicate that groups including children are increasing. For the past two years, groups with children have increased. Further, the current year percentage of 58.8% is considerably higher than the median percentage from prior years (34.0%).

Destination Choice Resources

The following section summarizes how visitors chose Gettysburg for their current trip in 2014. This includes their use of marketing resources in a variety of categories related to destination choice.

Use of Marketing Resources for Choosing Gettysburg as a Destination

Visitors were questioned about the methods they used to make their decision to choose Gettysburg for their current trip. Respondents were offered several potential marketing resources and were asked to choose the methods that applied to their 2014 trip. 37.3% identified that a *previous visit* was the reason for this decision (7.0% decrease from 2013). 35.4% used the *internet or a website* (a decrease of nearly 6.1%). This is the third consecutive year that *internet or a website* has exceeded *word of mouth/referral*. 21.4% identified *word of mouth or a referral* (a 1.8% decrease from last year). *Educational Institution* was selected in 6.5% of cases. *Travelbook/Guide* was selected in 5.6% of cases. *Information/Welcome Center* was selected in 5.5% of cases. Other marketing resources were mentioned by less than 5.0% of all respondents. Figure 15 presents the top six marketing resource choices.

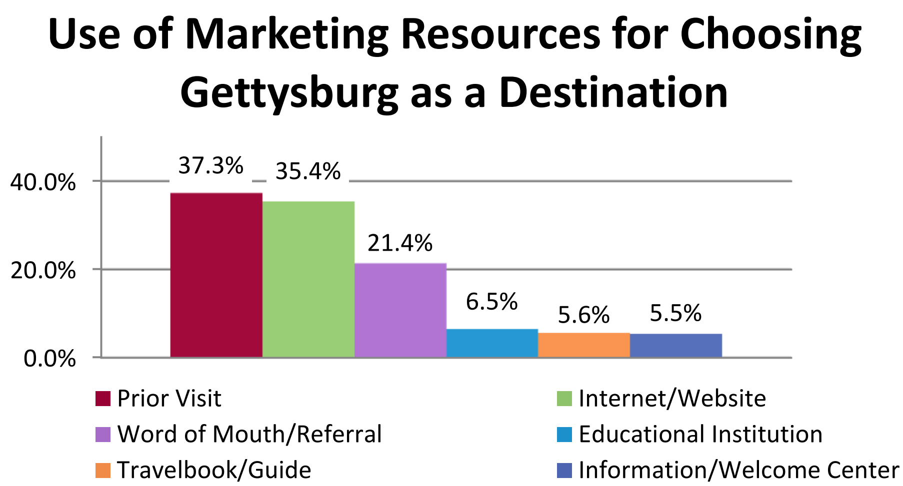

Figure 1511

Marketing resources with identification rates less than 5.0% included the following:

- Tour operator (3.9%),
- Brochures (3.6%),
- Documentary (2.3%),
- Special Offers (2.1%),
- Billboards/Signs (0.9%),
- Newspaper ads (0.8%),
- Newspaper articles (0.6%),
- Magazine ads (0.5%),
- Magazine Articles (0.3%),
- Newsletter/posters (0.3%).

The *Other* category consisted of incomprehensible responses or responses that would not fit into any particular established category (such as the responses Family or Work). The most prominent listing in the other category was Family, but this was an open-ended question, so determining the aspects of family that led to visitation is not easy to establish. The *Other* category was chosen in 10.6% of cases.

Table 7 presents the current year marketing resource response rate and compares it to the median value for each respective category over the life of the survey.

Marketing Resource	Current Year 2014	Median Value for this Category Across Prior Years
Prior Visit	**37.3%**	**41.4%**
Internet	**35.4%**	**30.5%**
Word of Mouth/Referral	**21.4%**	**23.1%**
Educational Institution	**6.5%**	**8.7%**
Travel Book	**5.6%**	**7.2%**
Information/Welcome Center	**5.5%**	**9.3%**

Table 7

Visitor Spending

In the third year of data, the research team was able to review spending data with a greater frame of reference. Spending data presentation was changed a few years ago based on two factors. First, the high variability of spending data weakens the usability of average or median spending estimates. Second, the possibility of bimodal data creates a challenge with respect to presenting only central tendency measures as representations of data.

To resolve the variability problem, spending data are presented in figures that divide spending estimates into categories (where *natural breaks* occur). Figures 16 through 20 present categorical natural breaks for each spending estimate observation in the Gettysburg Intercept Study.

While using averages to describe spending estimates has been determined to be less than optimal, spending estimate averages are included in Appendix A (adjusted for inflation). However, *the research study team has determined that the average values are highly volatile with respect to spending estimates and thus, average spending figures should be considered carefully if involved in any decision-making process*. Figures such as those included in the spending estimates section of this report describe spending practices of the survey group more completely than single values like average or median.

Total Spending

Throughout the life of the Gettysburg Intercept Survey, Total Spending has been divided between two main groups. The first group spends near the $0 side of the distribution and the second group spends beyond the $500 level, according to their respective reports. In 2014, total spending follows this pattern with many visitors reporting spending below $300 for the lower group and above $300 for the higher group. Across the entire distribution, it is within reasonable limits to describe the entire Total Spending variable using median. All spending categories for 2014 are of one mode and they follow a standard skewed distribution pattern. *Median total spending in 2014 is $200 per visitor group*. This value is a middle number not subjected to the influence of extremely high or low values.

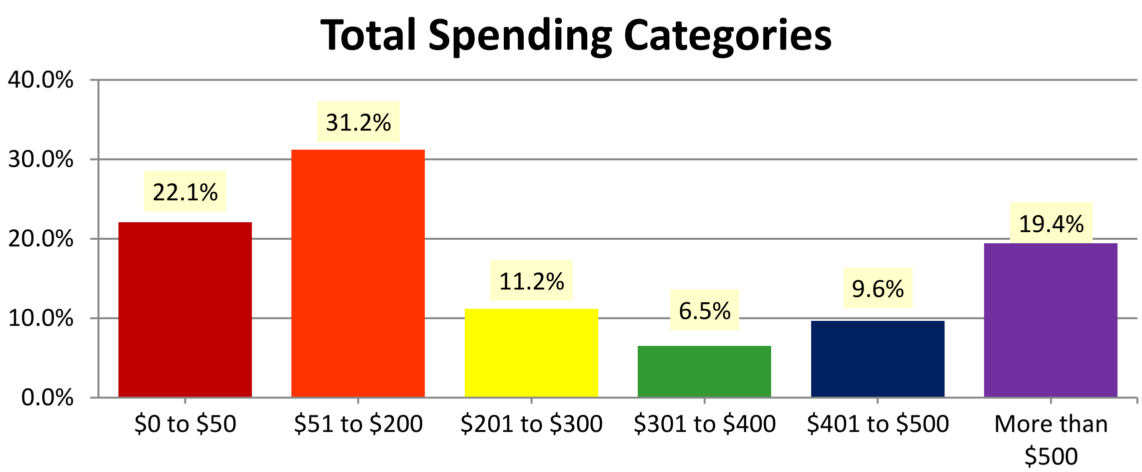

Figure 16

Accommodation Spending

Figure 17 presents visitor spending estimates for accommodations using natural breaks categories. In 2014, 20.4% of visitors estimated spending $100 or less on accommodations (7.4% lower than the same category last year). Many visitors reported spending over $300 on accommodations (27.5%; 5.1% higher than the same category last year). Accommodation spending appears to be leveling with respect to comparing the categories shown in Figure 17. The range between the highest and lowest category for this variable is a relatively low 9.0%. Median accommodation spending was $200 in 2014 (no change from last year).

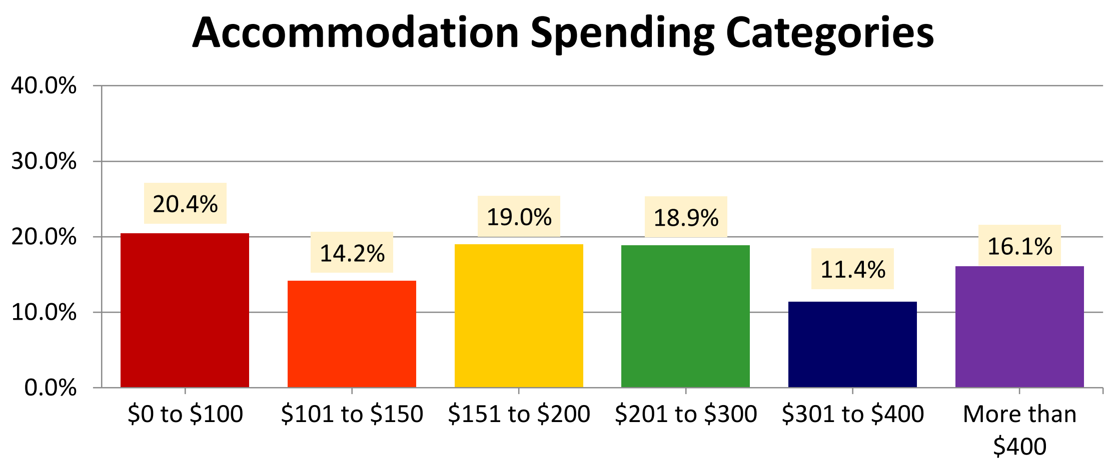

Figure 17

Attraction Spending
The median attraction spending estimate can be useful in this particular case because the effect of extreme values are controlled by using median. For 2014, the median attraction spending estimate is $60 (no change from last year). The current year median value of $60 is $35 higher than median attraction spending in 2011, and $25 higher than median attraction spending in 2012. Attraction spending growth is holding at $60 for the second consecutive year, future data will be necessary to determine if this is a plateau in the data or a temporary pause in growth. Figure 18 presents attraction spending in natural breaks categories. Natural breaks categories for this year were similar to natural breaks categories for last year further supporting the similarity between visitors from both respective years.

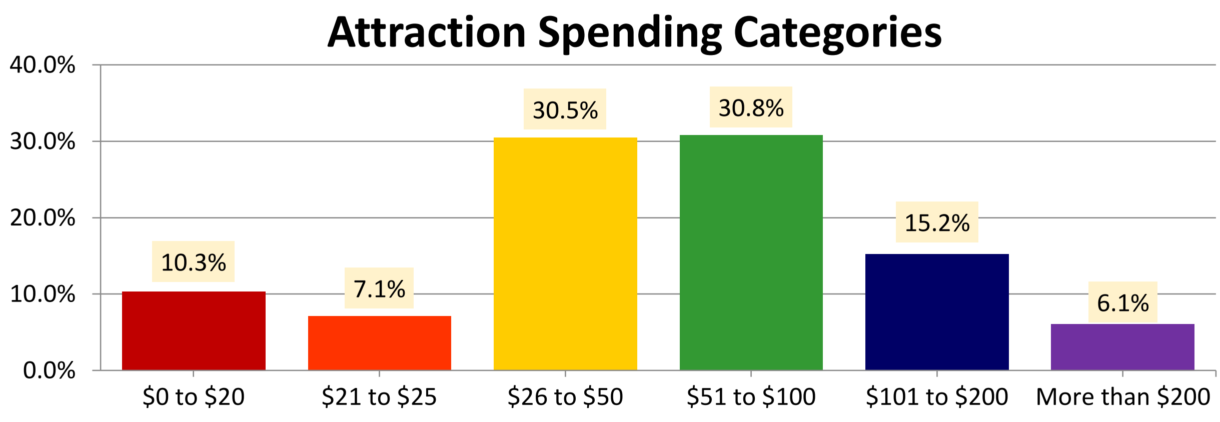

Figure 18

Shopping Spending

In 2014, most visitors reported spending $50 on shopping ($50 was the mode and median). Last year median shopping spending was $50. Also in 2014, 57.5% of respondents indicated shopping spending ranging from $25 to $100. Shopping spending estimates fall near the middle of all reported shopping spending this year with fewer reports in the extreme high or low areas of the distribution (see Figure 19). In past years, shopping spending was divided into two clearly identifiable groups. In 2014, shopping spending is less variable across the entire distribution compared to past years.

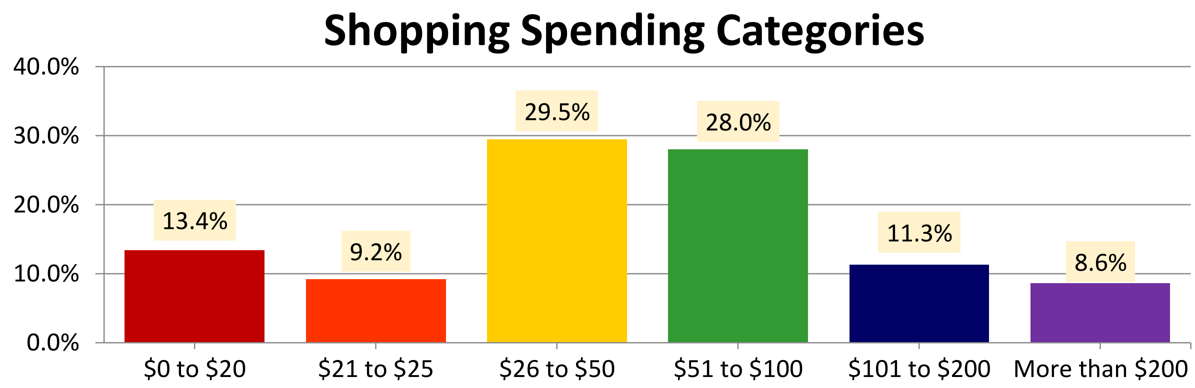

Figure 19

Food and Beverage Spending

In 2014, median spending on food and beverages was $75 ($25 lower than last year's $100 median, and the same as the 2012 median). Over the past three years, median spending on food and beverage has shifted between $75 and $100. However, the majority of responses for this category are less than $100 (74.1%). Figure 20 presents food and beverage spending estimates in natural breaks categories.

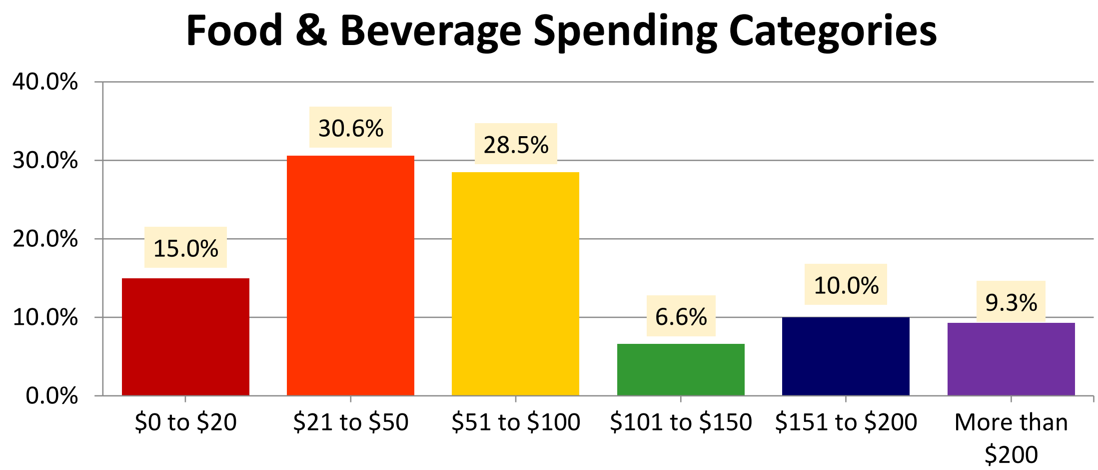

Figure 20

Highlighting Spending

With respect to spending, it is worth noting the value of calculating median and using median within one year, and across several visitation years. Median is a “heavy” number for one individual response to move, as it were. For example, if we add one visitor to our sample and she estimates her spending to be $1 million by the conclusion of her trip, it will not change the median value for total spending. However, it will change ***average*** total spending considerably. This example demonstrates the reason that the study team has remained distant from average as a descriptive value. Average can be changed without much effort by the addition of one extreme number. In comparison, median requires the addition of many higher or lower numbers before a change registers in median value. A single number, no matter how large or small, will not have much of an effect on median value.

The point is that any change in median is noteworthy because it requires many higher or lower individual reports before a shift in median value is detected. Even if the change is an increase of only $10, it demonstrates that many more visitors are reporting a higher number across the entire group. An increase in median spending is likely to be a valid indicator that all visitors are spending more (not just within the study sample, but also all actual visitors to Gettysburg during the visitation year in question).

Visitor Experience and Satisfaction

The following section summarizes overall visitor experiences and satisfaction levels. The survey questioned what attracted the visitor to Gettysburg, their visitation to Gettysburg National Military Park, their overall satisfaction, their propensity to return, and their willingness to recommend Gettysburg as a destination.

Attraction to Gettysburg

Visitors were asked to describe what attracted them to Gettysburg. This was an open and qualitative question, which provided different feedback on what motivated the visitor to select Gettysburg as a destination. The most popular response was Gettysburg’s historical value. In 2014, 11.0% of respondents did not visit or intend to visit the Gettysburg National Military Park on their current trip (a 7.4% increase in the “No” category; see Figure 21).

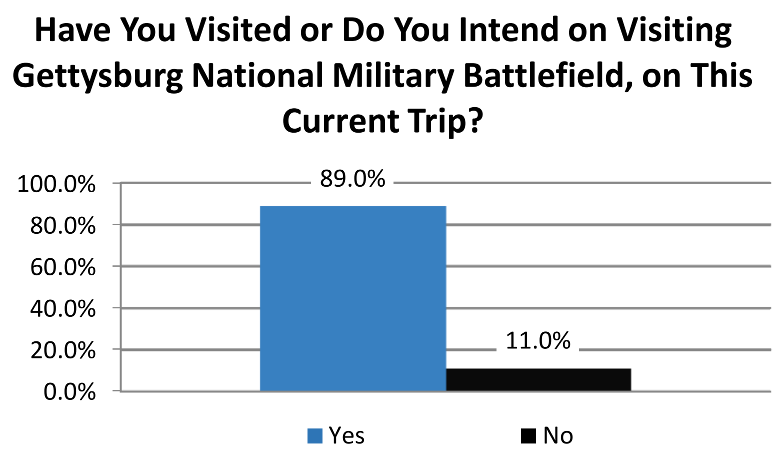

Figure 21

When describing the attractiveness of Gettysburg, or reasons that visitors were attracted to the destination, most responses could be categorized as:

- Historical value (73.3%);
- Area Attractions or Events (12.0%);
- Friends, Family, or Heritage (7.5%);
- Convenience (3.3%);
- Curiosity (1.6%); and,
- *Indiscernible Responses* (2.3%).

Satisfaction Levels

Visitors were asked to rate their current trip to Gettysburg on a scale of one to five. The options for the respondent were “very poor,” “poor,” “average,” “good,” and “excellent.” Once this question was scaled, visitors rated Gettysburg an average of 4.70 out of a possible 5.00 points (almost no change from last year). This means the majority of visitors (97.7%) rated their experience as “good” or “excellent,” but more frequently “excellent” thus indicating very high levels of visitor satisfaction in 2014.

Furthermore, visitors were asked their likelihood of returning to Gettysburg in the future. Respondents were asked to choose one response from “not at all likely,” “somewhat likely,” “maybe,” “likely,” and “very likely.” On average visitors rated their propensity to return as 4.17 out of 5 points. This means that the majority of visitors (77.8%; a decrease of 3.4% from last year) claim to be “likely” or “very likely” to return to Gettysburg for a repeat visit.

Visitors were also asked if they would recommend Gettysburg to others as a destination. 99.5% of visitors indicated that they would recommend Gettysburg to others (a decrease of 0.4% from last year; see Figure 22).

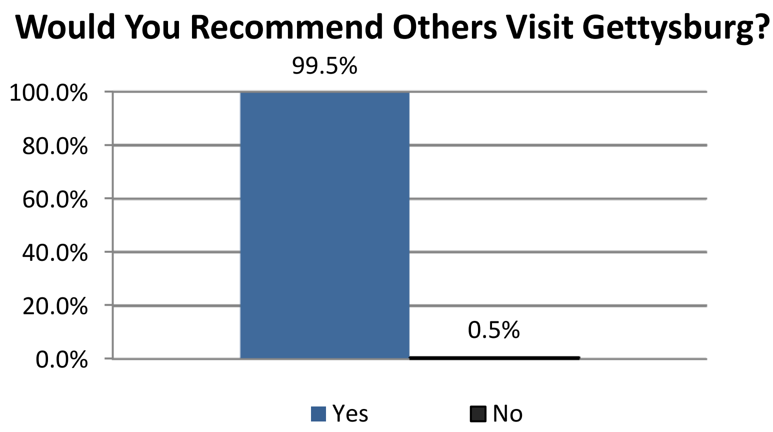

Figure 22

Conclusions

This report has summarized the data collected for the 2014 Gettysburg Visitor Study. The 2014 study has included the collection and analysis of data from 959 Gettysburg visitor questionnaires. The data have been summarized in the categories of demographics, trip characteristics, destination choice resources, spending, and trip experience and satisfaction. This year's study has also presented current-year values and compared those values to measures that describe variables across the entire life of this 8-year survey. The California University of Pennsylvania Tourism Research Center Team is confident that this year's data report will assist Destination Gettysburg in achieving its goals and promoting Gettysburg as a premier travel destination for the betterment of visitors, its members, and the community. The Team looks forward to providing continued support to Destination Gettysburg in future efforts.

Appendix A: Table for Comparison by Year (Section 1)

For some variables, average values are provided for your review only. Such information is identified using italics in the tables below. Italicized values have been determined to be less than optimal relative to the variable each italicized value describes. These values should be used cautiously in the decision-making process.

Descriptor	**2014 Value**	2013 Value	2012 Value	2011 Value	2010 Value	2009 Value	2008 Value	2007 Value
Visitors from the US	**95.8%**	97.5%	96.7%	97.3%	98.5%	96.6%	97.3%	98.0%
International Visitors	**4.2%**	2.5%	3.3%	2.7%	1.5%	3.4%	2.7%	2.0%
Average Age (years)	**53**	53	53	52	49	51	48	47
Less than 9th Grade	**0.6%**	0.2%	0.5%	0.2%	1.1%	0%	0.2%	0.2%
Some High School	**0.8%**	0%	1.0%	0.8%	2.8%	0.8%	1.0%	0.0%
High Sch. Grad only	**9.8%**	10.3%	14.5%	14.4%	11.5%	14.2%	12.1%	6.5%
Some College no degree	**17.1%**	15.4%	15.7%	14.3%	17.2%	20.0%	16.5%	11.7%
Associate Degree	**10.0%**	10.3%	14.5%	9.7%	15.5%	11.1%	14.5%	18.9%
Bachelor's Degree	**38.6%**	27.7%	32.8%	33.5%	26.9%	26.6%	33.5%	43.8%
Grad/Prof. Degree	**23.2%**	36.1%	21.0%	27.0%	25.0%	27.3%	22.2%	18.8%
Some college or more	**88.9%**	89.5%	84.0%	84.5%	84.6%	85.0%	86.7%	93.2%
Degree > HS Diploma	**71.8%**	74.1%	68.3%	70.2%	67.4%	65.0%	70.2%	81.5%
$75,000-$99,999	**13.7%**	13.7%	19.3%	18.8%	10.4%	11.3%	16.3%	12.0%
$100,000-$124,999	**13.7%**	12.9%	11.9%	13.5%	8.0%	8.5%	13.8%	9.1%
$60,000-$74,999	**12.2%**	12.7%	14.5%	15.9%	13.5%	12.0%	10.1%	16.3%
$50,000-$59,999	**10.9%**	9.8%	14.5%	11.9%	18.9%	14.8%	14.1%	14.8%
$40,000-$49,999	**9.1%**	8.1%	9.6%	9.9%	14.0%	14.4%	12.3%	14.3%
$125,000-$149,999	**8.4%**	8.2%	6.3%	5.3%	6.1%	5.2%	4.0%	5.1%
$150,000-$199,999	**7.8%**	8.9%	6.6%	5.1%	3.7%	5.2%	3.2%	2.3%
Less than $10,000	**6.3%**	1.6%	2.6%	2.7%	1.9%	3.7%	1.9%	0.5%
$30,000-$39,999	**5.8%**	6.7%	4.6%	5.9%	7.9%	6.6%	2.2%	1.0%
$200,000 or more	**5.0%**	11.7%	4.8%	4.9%	2.9%	4.2%	6.3%	9.8%
$20,000-$29,999	**4.6%**	3.4%	4.6%	4.2%	9.6%	9.3%	9.9%	12.4%
$10,000-$19,999	**2.5%**	2.3%	0.7%	1.9%	3.0%	5.0%	5.9%	2.5%
< $50,000	**28.3%**	22.1%	22.1%	24.6%	36.4%	35.1%	40.1%	25.1%
$50,000-$99,999	**36.8%**	36.2%	48.3%	46.6%	42.8%	26.8%	36.5%	45.4%
$100,000-$199,999	**29.9%**	30.0%	24.8%	23.9%	17.8%	18.7%	20.2%	27.3%

Appendix A: Table for Comparison by Year (Section 2)

Descriptor	**2014 Value**	2013 Value	2012 Value	2011 Value	2010 Value	2009 Value	2008 Value	2007 Value
Female visitors	**48.8%**	54.1%	51.6%	41.8%	47.2%	53.4%	51.5%	52.1%
Male visitors	**51.2%**	45.9%	48.4%	58.2%	52.8%	46.6%	48.5%	47.9%
1st Gettysburg Trip	**46.2%**	41.2%	46.7%	48.1%	43.3%	41.0%	37.0%	45.3%
Not 1st Gettysburg Trip	**53.8%**	58.8%	53.3%	51.9%	56.7%	59.0%	63.0%	54.5%
Median prior visits to GB	**4.00**	3.00	3.00	3.00	4.00	4.00	4.00	5.00
Purpose: Pleasure	**83.1%**	87.2%	88.6%	88.2%	82.7%	90.8%	89.0%	86.7%
Purpose: Friends/Relatives	**11.3%**	8.9%	6.4%	7.8%	10.3%	6.5%	7.2%	2.0%
Purpose: Business	**5.6%**	3.9%	5.0%	4.0%	7.0%	2.6%	3.8%	10.5%
Gettysb. Main Destination	**84.5%**	79.0%	70.0%	71.7%	87.3%	85.8%	86.5%	83.7%
Gettysb. One of many Dest.	**13.7%**	17.0%	26.6%	23.0%	9.2%	11.0%	7.8%	12.2%
Gettysb. Not a planned Dest.	**1.8%**	4.0%	3.4%	5.3%	3.5%	3.2%	5.7%	4.1%
Median Length of Stay*	**2.00**	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Average Length of Stay	***1.19***	*1.32*	*1.44*	*1.50*	*1.25*	*1.30*	*1.07*	*1.23*
Stay: Day Trip (not overnight)	**50.4%**	40.3%	38.8%	38.5%	43.6%	43.4%	51.0%	51.8%
Stay: Stayover (one night)	**14.8%**	25.3%	19.9%	21.0%	22.2%	17.3%	16.9%	23.9%
Stay: Stayover (two nights)	**19.9%**	17.0%	19.0%	17.8%	15.4%	19.4%	17.3%	11.0%
Stay: Stayover (three nights)	**7.7%**	8.5%	12.7%	10.6%	8.1%	11.3%	8.5%	7.3%
Stay: Stayover (> 3 nights)	**7.2%**	8.1%	9.6%	12.0%	9.2%	7.7%	5.5%	5.8%
Gettysburg accommodation[1]	**38.5%**	45.7%	21.2%	49.7%	63.2%	N/V	N/V	42.6%
Staying, % hotel/motel	**72.7%**	66.3%	70.3%	69.2%	65.2%	75.5%	67.2%	56.5%
Staying, % campground	**11.3%**	11.1%	10.3%	13.3%	9.2%	14.6%	14.0%	5.3%
Staying, % bed & breakfast	**6.8%**	17.2%	12.4%	10.9%	18.0%	7.5%	14.0%	31.7%
Staying, % friends/relatives	**6.8%**	4.2%	4.7%	4.5%	6.6%	2.2%	4.3%	6.3%
Of those staying, % Other	**2.4%**	1.1%	2.4%	2.0%	0.9%	0.2%	0.5%	0.2%
Median Party Size	**3.00**	2.00	2.00	3.00	2.00	2.00	3.00	3.00
Group size of: 1 person	**7.9%**	6.8%	5.0%	8.2%	7.7%	7.3%	6.3%	4.8%
Group size of: 2 people	**39.7%**	48.6%	55.8%	40.4%	44.2%	49.0%	39.3%	38.2%
Group size of: 3 people	**15.8%**	15.8%	12.2%	13.7%	14.6%	15.3%	13.7%	15.3%
Group size of: 4 people	**17.2%**	10.9%	12.6%	15.6%	14.9%	14.0%	18.2%	18.7%
Group size of: 5 people	**4.0%**	4.2%	4.4%	7.1%	5.8%	6.0%	7.7%	9.3%
Group size: 6 or more	**15.4%**	13.7%	10.0%	15.0%	12.8%	8.4%	9.4%	13.7%

Appendix A: Table for Comparison by Year (Section 3)

Descriptor	**2014 Value**	2013 Value	2012 Value	2011 Value	2010 Value	2009 Value	2008 Value	2007 Value
Groups with at least 1 child[2]	**58.8%**	47.7%	21.7%	32.4%	35.6%	28.5%	38.1%	N/C
Groups without children[2]	**41.2%**	52.3%	79.3%	67.6%	64.4%	71.5%	61.9%	N/C
Median under age 18[2]	**1.00**	0.00	0.00	0.00	0.00	0.00	0.00	N/C
Med. <18 (w/children only)[2]	**2.00**	2.00	2.00	2.00	2.00	2.00	2.00	N/C
Decision: Prior visit	**37.3%**	44.3%	36.2%	36.8%	38.5%	45.1%	50.7%	Q/C
Internet/website	**35.4%**	41.5%	23.6%	19.7%	36.8%	35.9%	25.0%	Q/C
Referral	**21.4%**	23.2%	22.9%	20.4%	23.9%	26.7%	20.3%	Q/C
Edu. Institution	**6.5%**	4.2%	8.7%	13.3%	8.4%	13.1%	C/A	Q/C
Travel book/guide	**5.6%**	13.2%	3.7%	4.0%	8.7%	13.7%	5.6%	Q/C
Avg. spent total trip[3]	***$351.39***	*$492.73*	*$559.53*	*$492.04*	*$378.47*	*$361.74*	*$331.76*	*$376.49*
Avg. spent accommodation[3]	***$275.83***	*$265.24*	*$302.18*	*$168.73*	*$126.63*	*$148.21*	*$132.31*	*$97.50*
Avg. spent attractions[3]	***$95.51***	*$98.37*	*$79.93*	*$143.79*	*$59.34*	*$78.73*	*$69.22*	*$38.69*
Avg. food and beverage[3]	***$104.11***	*$130.79*	*$120.90*	*$116.13*	*$103.31*	*$105.46*	*$97.64*	*$95.44*
Avg. shopping purchases[3]	***$118.12***	*$87.93*	*$100.38*	*$69.98*	*$66.11*	*$97.48*	*$87.68*	*$67.62*
Visiting Military Park	**89.0%**	96.4%	94.5%	97.2%	94.3%	90.4%	89.5%	Q/C
Avg. GB satisfaction score	**4.70**	4.71	4.63	4.71	4.58	4.62	4.63	4.85
Avg. Returning? (1 to 5 scale)	**4.17**	4.28	4.10	4.13	4.23	4.15	4.24	4.16
Recommend to others	**99.5**	99.8%	99.7%	99.8%	99.7%	99.9%	99.9%	99.6%

[1] To get a more valuable figure, this calculation is based on all surveys, missing and not answered were included in this estimate. For this value, we know that at least 45.7% of respondents are staying in overnight accommodations. While the actual value within the population could be higher, we cannot identify any other number with greater certainty.

[2] Group composition data did not include number of children within each group for the 2007 survey.

[3] All values are shown in 2014 dollars - appropriately adjusted for inflation. Please note that extremely high spending estimates in only a few respondents can have a considerable influence on these values. Figures 16 through 20 are a clearer representation of spending practices.

N/A = Not applicable N/V = Not valid N/C = Not conducted
Q/C = Question Changed (Comparison not appropriate.) C/A = Category Added

Appendix B: Approvals

Cal U Institutional Review Board Application – Approved
Proposal #06 – 047

National Parks Service Permit #: DIST GETT 2520-112

National Parks Service Permit #: DIST GETT 2520-177

Appendix C: Paper Version of Visitor Survey

Appendix C: Paper Version of Visitor Survey--<u>Gettysburg Visitor Study</u>-- Approved by the California University of Pennsylvania IRB

Interviewer Script- *Could you please take a few moments to complete this survey? This is a visitors survey being conducted for Destination Gettysburg. All responses are voluntary, anonymous, and risk free. Completion of this survey is an indication of consent to use the data. The data will be kept in a secure location at California University of Pennsylvania*

Interviewer Script- *In the first few questions, we want to know a little about you.*

1. What is your postal/zip code? ☐ (If postal code answer 1b) 1b.What is your country of origin? ☐
2. What year were you born? ☐

Interviewer Script- *Next, we want to know about your current trip to Gettysburg.*

3a. Is this your first visit to Gettysburg? ○ **Yes** (skip to Q4) ○ **No**
3b.Please specify your # of previous trips to Gettysburg? ☐

4. What is your primary purpose of your visit today? *(please check one)*

○ **Business** ○ **Pleasure** ○ **Visiting friends and/or relatives**

5a. Was Gettysburg the primary destination of your visit today? ○ **Yes** ○ **No, one of several** ○ **No, it was not a planned destination**
5b. What is your primary destination? ___________

6a. How long are you planning on staying? ○ **One day or less** (go to Q 7) ○ **One night** (go to Q 6C) ○ **More than one night** (go to Q 6B) ○ **Undecided** (go to Q 7)

6b. If staying more than one night, please specify how many nights___________

6c. Are you staying in an overnight accommodation within a 15 mile radius of Gettysburg? ○ **No** (proceed to question 7) ○ **Yes** (proceed to question 6d)

6d. At what type of overnight accommodation in Gettyburg are you staying?
○ **Hotel/Motel** ○ **Bed and Breakfast** ○ **Campground** ○ **Staying with Friends or Family** ○ **Other** (please Specify)__________

6e. How many days have elapsed since you arrived in Gettysburg? ___________days

7. How many people, including yourself, are traveling with you on your current trip? ___________people
8. How many people in your party are under the age of 18? ___________people
9. What is the group size? ○ **1-5** ○ **6-10** ○ **11-15** ○ **16-24** ○ **25+**

10. What method(s) did you use to make your decision about choosing Gettysburg for your current trip? (please look at the orange card)

○ **Billboard** ○ **Internet** ○ **Magazine Ads** ○ **Magazine Articles** ○ **Newspaper ads** ○ **Newspaper Articles**
○ **Travel book/guide** ○ **Documentary** ○ **Brochures** ○ **TourOperator** ○ **Educational Institution** ○ **Return Visit**
○ **Word of Mouth/referral** ○ **Newsletters/Posters** ○ **Information/Welcome center** ○ **special Coupons/Offers** ○ **Other** ______

11. What attracted you to choose Gettysburg as a destination for your current trip? ______

12. What, if any, technology (i.e mobile device, tablet, etc.) have you utilized during your trip? ______

13. Have you visited or do you intend on visiting the Gettysburg National Military Battlefield on this current trip? ○ **Yes** ○ **No**

Interviewer Script- Now I am going to ask you some questions about your spending on your current trip.

14. Upon the conclusion of your current trip, what will be the best estimate of U.S dollars you will have spent total here in Gettysburg? ______

15. What will you have spent to stay in overnight accomodations? ______

16. What will you have spent on things to see and do? ______

17. What will you have spent on shopping purchases? ______

18. What will you have spent to eat and drink? ______

19. Do you plan to spend money in Gettysburg on anything else not previously mentioned in the spending questions? ______

Interviwer script: *In the next few questions, I am going to ask you about your experience in Gettysburg.*

20. How would you rate your current trip to Gettysburg? ○ **Very Poor** ○ **Poor** ○ **Average** ○ **Good** ○ **Excellent**

21. How likely are you to visit Gettysburg in the future? ○ **Not at all likely** ○ **Somewhat likely** ○ **Maybe** ○ **Likely** ○ **Very likely**

22. Would you recommend others to visit Gettysburg? ○ **Yes** ○ **No**

Interviewer Script- *When the respondent reaches questions 24 and 25 they will be handed a set of colored index cards with the question and responses.*
Interviewer script *– The last 2 questions of the survey are for classification purposes only. I remind you that your responses are voluntary and anonymous.*

23. Please look at the green card. Which of the following letters best describes you?

○ **A. Less than 9th grade** ○ **B. Some High School** (no diploma) ○ **C. High School Diploma** ○ **D. Some College** (no degree)

○ **E. Associate Degree** ○ **F. Bachelors Degree** ○ **G. Graduate/Professional Degree**

24. Please look at the yellow card. Which of the following letters best describes you?

○ **A. Less than $10,000** ○ **B. $10,000-19,999** ○ **C.$20,000-$29,999** ○ **D.$30,000-$39,999** ○ **E.$40,000- $49,999**

○ **F. $50,000-$59,999** ○ **G.$60,000-$74,999** ○ **H. $75,000- $99,999** ○ **I. $100,000-$124,999** ○ **J. $125,000-$149,999**

○ **K. $150,000-$ 199,999** ○ **L. $200,000 or more**

Interviewer script-Thank you for participating in the Gettysburg Visitors Study. Do you need to Contact anyone regarding this survey? *(if yes, hand out the follow up card. Any Questions regarding this survey can be directed to Dr., Susan Ryan by email or by telephone, which is specified on the card.)*

Gender ○ Female ○ Male Time _____________ Site/Location:__________ Date: ___________ Interviewer name_____________