

# 2019

# Gettysburg Intercept Visitor Survey

## A Summary Report

Submitted May/2020



Submitted to: Mr. Norris Flowers , President and CEO Destination Gettysburg  
Submitted by: Dr. Susan Ryan, Director Cal U Tourism Research Center

## INTRODUCTION

The following report summarizes findings from the 2019 Gettysburg Visitor Study conducted by Dr. Susan Ryan and a study team from California University of Pennsylvania's Tourism Research Center.

The 2019 report summary includes demographics, trip characteristics, destination choice resources, spending estimates, trip experience, and satisfaction ratings. In addition to the narrative sections that comprise most of this report, Appendix A contains summarizing year-to-year tables for reference and review.

The 2019 Study Team expects that these results will assist Destination Gettysburg to make informed decisions for promoting Gettysburg as a premier travel destination for the betterment of the community, its members, and Gettysburg visitors.

## THE 2019 STUDY TEAM

Study Team members for 2019 included Katelyn Klenk (Lead Project and Research Specialist), Taylor Krause, Mark Myers, Daevonne Nickens, Megan Schmidt, Dillon Shash (Fieldworkers and Project and Research Specialists ), Ashley O'Hern (GIS Specialist), and Sean Hayes (Statistical Research Consultant and Report Co-author).

Appropriate on-site permissions were obtained for the 2019 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).

This visitation year's survey intercept locations included:

- Devil's Den;
- Culps Hill Observation Tower;
- Eternal Light Peace Light Memorial;
- Gettysburg Heritage Center;
- Gettysburg National Military Park Museum and Visitors Center;
- High Water Mark of the Rebellion Monument;
- Intersection of Baltimore Street and Steinwehr Avenue;
- Lincoln Square;
- Little Round Top;
- Pennsylvania State Memorial; and,
- Spangler's Spring.

The study represents all 2019 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 study team has analyzed 734 useable surveys for this report using ESRI ArcGIS and IBM Statistical Package for the Social Sciences. The following sections summarize the results of the 2019 Gettysburg Visitor Study.

## ANALYSIS FOR 2019

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 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 the median as a measure of central tendency, the need to control outliers (extremely high or low values that are rare within a group of data) is eliminated.

As in previous reports, the 2019 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.

In 2019, most variables were compared to the median value for the past 10 years of data. This allows for a comparison between the current year of data and the middle value out of all measures of a given variable over the past ten years. Comparing against the 10-year median provides a method to evaluate whether the current year has a higher or lower response rate compared to measures conducted in other visitor years. This method was also applied in 2018. As an example, in 2019, 29.5% of visitor groups included at least 1 child. Reviewing measures for groups with at least 1 child over the past 10 years reveals that the 2019 measure is slightly less than the middle point for all measures of visitor groups including at least one child in the current decade (34.4% is the 10-year median). This would seem to indicate that the value for groups with children in 2019 is a measure slightly below the middle value, but not extreme compared to other visitation years.

## 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 acceptably describes the entire set. 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 the 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 example above, 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 2019 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, the 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*. 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 Figure 12).

## VISITORS TO GETTYSBURG IN 2019

### DEMOGRAPHIC INFORMATION

The following section summarizes the key demographic characteristics of visitors to Gettysburg in 2019. 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 1). 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 twenty-mile threshold.

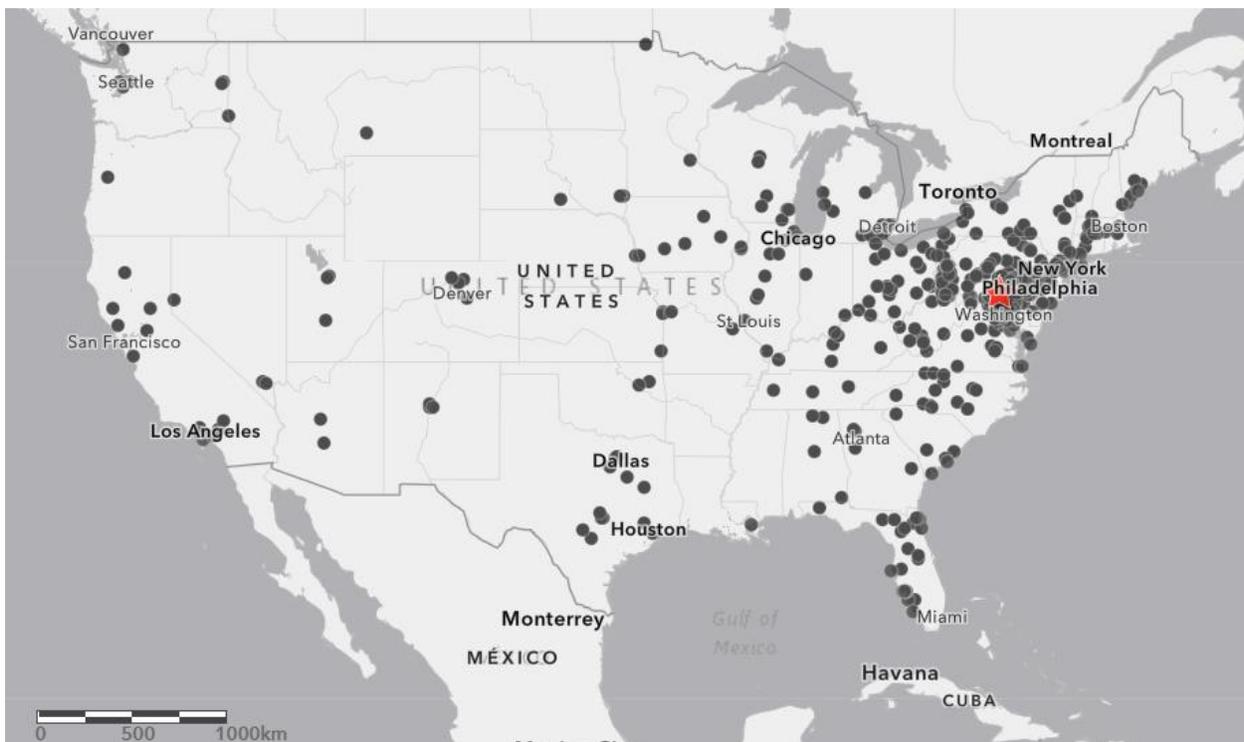


Figure 1

Most visitors to Gettysburg in 2019 were from the United States (98.1%). The most frequent domestic states of origin were Pennsylvania, Maryland, New York, Virginia, Ohio, and Florida (Figures 1 and 2).

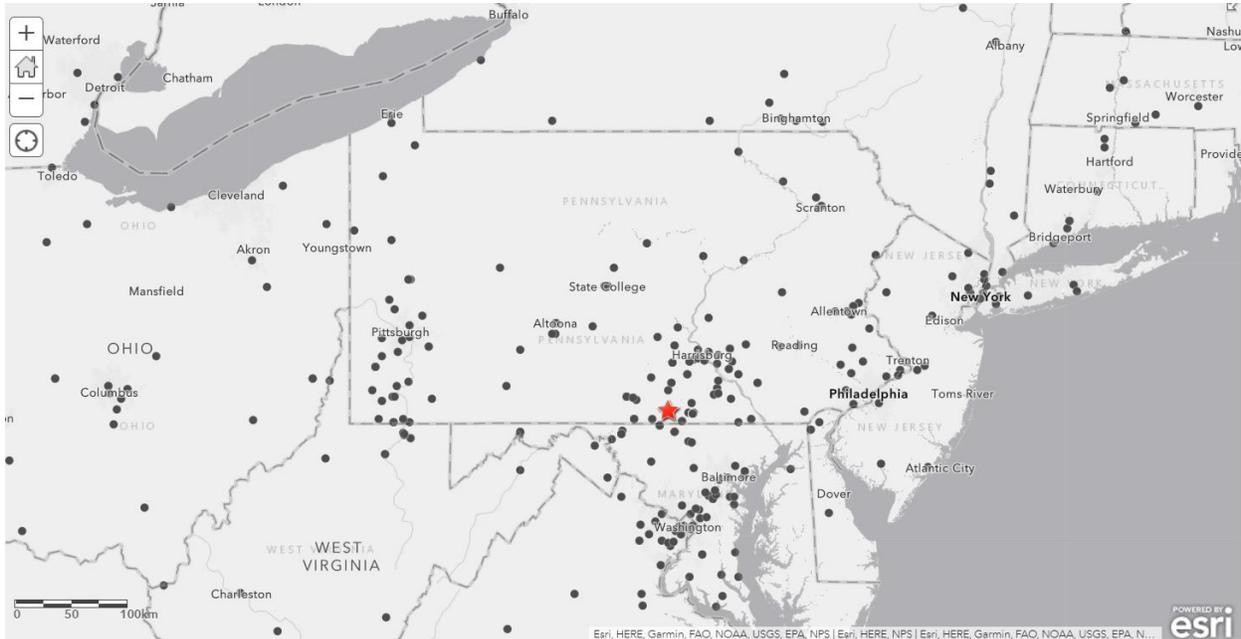


Figure 2

Gettysburg did experience international visitation (1.9%); however, the rates of international visitation were relatively low. Each international point of origin occurred with a frequency rate below 0.6%. The median rate of international visitation to Gettysburg throughout the last 10 years of data is 2.75%. International visitation has never exceeded 4.2% (occurring in 2014) and it has never been lower than 1.5% (2010) since the beginning of the Gettysburg Intercept Visitor Study. Overall, visitor point of origin data has remained stable throughout the life of the survey.

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#### AGE

The average age of visitors to Gettysburg in 2019 was 51 years. The average age has most commonly been 52 or 53 over the life of the survey. In 2019, ages ranged from 21 to 94. For 2019, the distribution of age approximates a normal curve in this sample and, thus, average appropriately describes visitor age for this visitor year.

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

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## EDUCATION

Visitors were also asked about educational attainment. 67.5% indicated the achievement of at least a Bachelor's Degree (7.8% increase from 2018). 18.0% of visitors claim to have completed some college or an Associate's Degree (5.8% decrease from 2018). 85.5% of visitors claim to have pursued some form of post-secondary education (2.0% increase from 2018). Table 1 displays the visitor educational attainment distribution for 2019.

Throughout the life of the Gettysburg Intercept Survey, visitors with some college have always outnumbered visitors with no college. Median values for the most recent 10 years of data across education level categories are listed in Table 1 for comparison. Visitors in 2019 were more likely to have obtained a Graduate or Professional degree in comparison to visitors from prior survey years (the 2019 survey recorded the highest percentage of Graduate or Professional Degree respondents in the most recent 10 survey years).

Level of Education	Percentage of 2019 Respondents	Median % for 10 Years
Graduate or Professional Degree	<b>38.2%</b>	<b>26.0%</b>
Bachelor's Degree	<b>29.3%</b>	<b>31.1%</b>
Some College (no degree)	<b>11.6%</b>	<b>15.6%</b>
High School Diploma	<b>11.6%</b>	<b>12.4%</b>
Associates Degree	<b>6.4%</b>	<b>10.4%</b>
Some High School (no diploma)	<b>2.9%</b>	<b>1.1%</b>
Less than 9 <sup>th</sup> Grade	<b>0.0%</b>	<b>0.2%</b>

Table 1

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## INCOME

In 2019, 23.7% of visitors to Gettysburg reported a total annual income ranging from \$75,000-\$99,999 (an increase of 4.5% from 2018; the 10-year median is 17.8% for this category). In 2019, the 10-year median for the \$75,000 to \$99,999 income category increased by 2.5%. Similarly, 19.5% of visitors reported an annual income of \$60,000-\$74,999 (a 6.8% increase from 2018; the 10-year median for this category increased by 6.6%). 12.0% reported

an annual income of \$100,000-\$124,999 (11.8% is the 10-year median for this group; almost no change in the median for this category).

With respect to larger categories, 17.6% reported annual income less than \$50,000 (a decrease of 12.0% compared to 2018; the 10-year median for this income range also decreased to 25.8% compared to 2018 [a median decrease of 1.7%]). The \$50,000 to \$99,999 income group represents 54.8% of 2019 visitors (a 10.4% increase compared to 2018; 43.1% is the 10-year median). 24.2% reported an income range from \$100,000-\$199,999 (10-year median is 24.5%). 3.5% of respondents reported an income range above \$200,000 (10-year median is 4.9%). Appendix A provides a comparison between study years within each of the different categories.

Within the most recent 10 years of data, the \$75,000-\$99,999 income category has a higher median response rate compared to all other categories, and the median value for this category increased by 2.5% in 2019 (17.8% was the median response rate across all years of data for this income category). The 2nd highest median response rate category for the past 10 years is the \$60,000-\$74,999 category (with a median value of 13.3%; also an increased compared to the 2018 median). This year, the \$100,000-\$124,999 category became the 3<sup>rd</sup> most commonly reported income category, moving ahead of the \$50,000-\$59,999 income category. However, over the last 10 years of data, the \$50,000-\$59,999 income category remains the 3<sup>rd</sup> most common with a median frequency of 12.3%. Shifting median values this year and in data collected over the past decade would seem to indicate increasing visitation from visitors in the \$60,000-\$124,999 range, compared to other income categories. Table 2 compares the current year income frequency to the median frequency of all study years.

Income Range	Percentage of 2019 Respondents	Median Value for this Category Last 10 Years
\$75,000-\$99,999	23.7%	17.8%
\$60,000-\$74,999	19.5%	13.3%
\$100,000-\$124,999	12.0%	11.8%
\$50,000-\$59,999	11.7%	12.2%
\$125,000-\$149,999	10.2%	7.1%
\$40,000-\$49,999	8.7%	9.8%

\$30,000-\$39,000	4.0%	6.7%
\$200,000 or more	3.5%	4.9%
\$20,000-\$29,999	2.3%	4.4%
\$10,000-\$19,999	2.0%	2.4%
\$150,000-\$199,999	2.0%	5.7%
Less than \$10,000	0.6%	2.9%

Table 2

## GENDER

The study team also gathers information about the observable gender characteristics of visitors (see Figure 3). In 2019, 48.9% of respondents were male (a 5.2% decrease from 2018). 51.1% of respondents were female (a 5.2% increase from last year). Over the life of the survey, the male to female ratio has consistently remained near an even 50:50 balance.

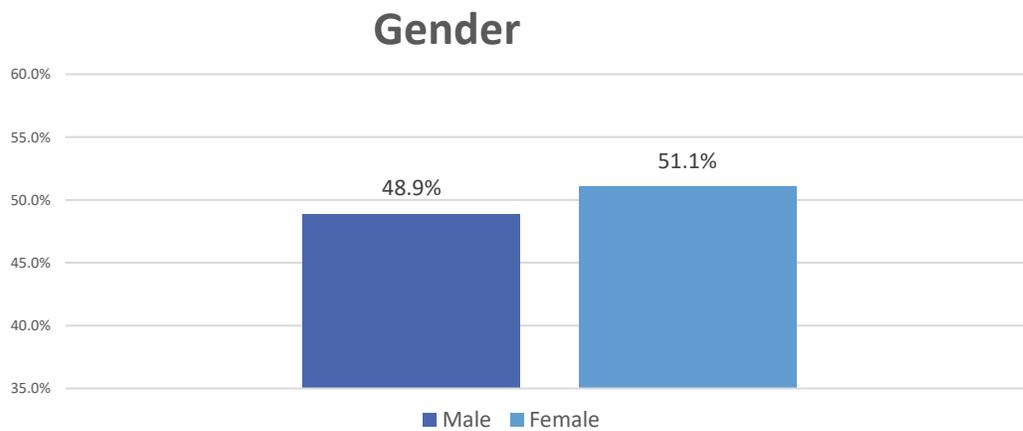


Figure 3

## TRIP CHARACTERISTICS

The following section reports results from the 2019 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 2019, the repeat visitation rate was 49.0%. 51.0% indicated it was their first visit (see Figure 4). New visitors were more common than repeat visitors for the first time in 2019.

### Is This Your First Visit to Gettysburg?

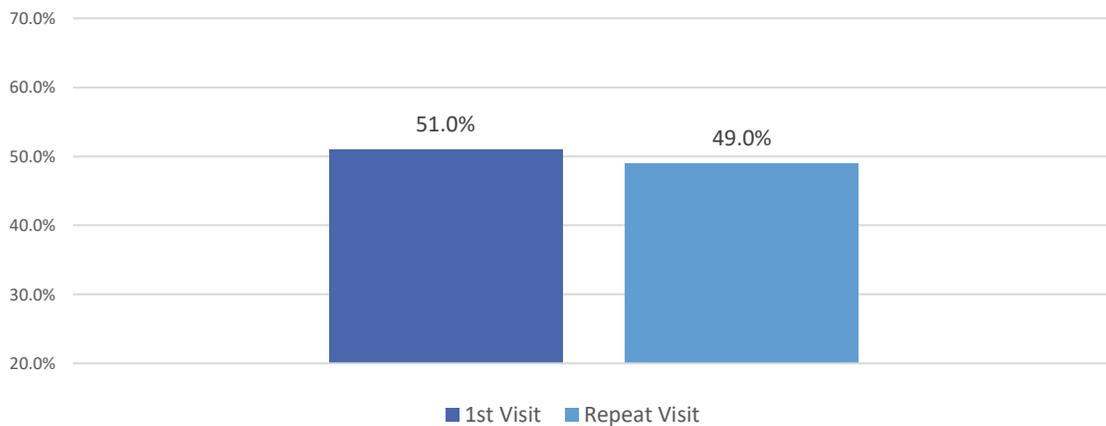


Figure 4

### CURRENT YEAR REPEAT VISITATION VERSUS MEDIAN REPEAT VISITATION RATE

Table 3 compares the repeat visitation rate for the current year to the median repeat visitation rate over the past 10 study years.

Previous Visits to Gettysburg	Percentage of Respondents	10-Year Median
1 <sup>st</sup> Trip to Gettysburg	51.0%	44.8%
Not 1 <sup>st</sup> Trip to Gettysburg	49.0%	55.2%

Table 3

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## 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 2019 traveled to Gettysburg for the primary purpose of pleasure. Visitors also indicated traveling to visit friends and relatives (VFR) and business travel (see Figure 5). In 2019, business as a trip motivator was indicated by 5.1% of respondents; an increase of 1.4% from last year. Visiting friends and relatives was reported in 7.7% of 2019 cases (a 0.9% decrease from last year). In 2019, pleasure as a trip motivator was reported by 87.3% of respondents (a decrease of 0.4%).

### What is the primary purpose of your visit today?

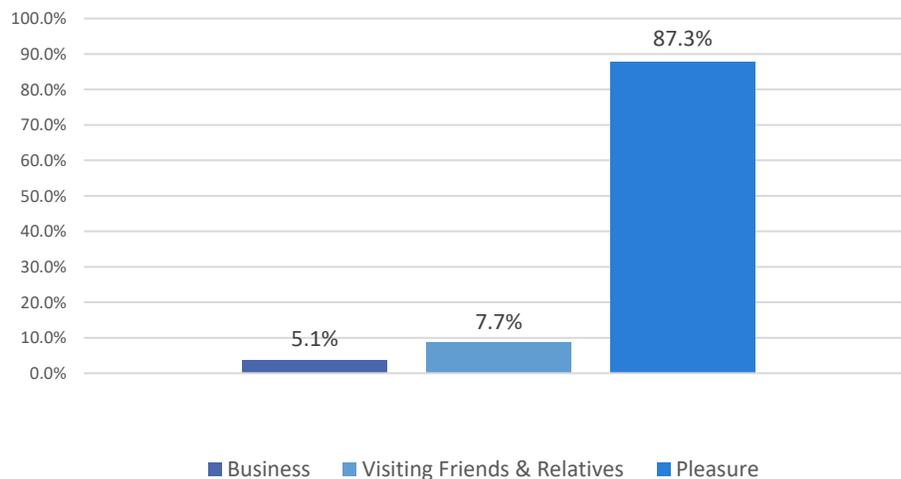


Figure 5

When visitors were questioned about their primary destination, 81.7% indicated that Gettysburg was the primary destination (a 1.4% increase from 2018). 13.9% indicated Gettysburg was one of several destinations (a 1.2% decrease from 2018). 4.4% indicated that Gettysburg was not a planned destination (a 0.2% decrease; see Figure 9).

Since the first year of this survey, Gettysburg has been the primary destination for the majority of visitors each year. Over the past 10 years of data, the median value for visitors claiming Gettysburg as their primary destination is 80.7%. The median value for Gettysburg as one of several destinations is 14.8% for the last 10 years of data. Those reporting that Gettysburg was not a planned destination occurred with a median value of 3.8% in the past 10 years.

## Was Gettysburg the primary destination of your visit today?

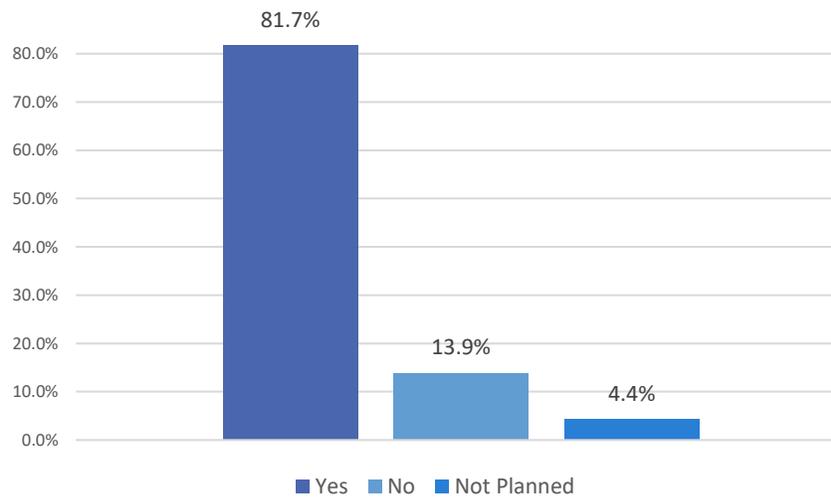


Figure 6

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 Washington D.C., Philadelphia, and New York. The destinations that were identified in 2019 were more variable than in past years, meaning that the differences between the least mentioned categories were not substantial. Washington D.C. was the most commonly identified city (identified by 7.4% of respondents not claiming Gettysburg as their primary destination; this was the most clearly identifiable alternative destination without contest; see Figure 7).

The data in 2019 continue to imply that 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) continue to be supportive of Gettysburg's marketing success.

Washington D.C. has been mentioned as a primary destination often over the years. National history is an important attractive feature that Gettysburg and Washington D.C. have in common. This could indicate that both destinations draw visitors from a market interested in travel convenience, but also interested in national historical sites as attractions.

## If not Gettysburg, what is your primary destination?

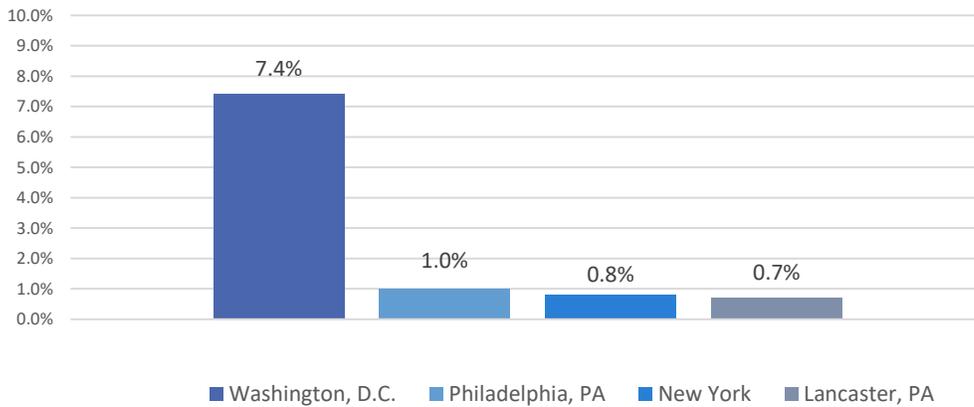


Figure 7

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### LENGTH OF STAY

Visitors were also questioned about length of stay. In 2019, one group of visitors indicated that they would be staying *one day or less* (45.7%; a 4.6% increase from 2018). A second group of visitors intended to stay in Gettysburg for *more than one night* (31.9%; a 5.1% decrease from 2018). 22.4% were planning to stay one night (a 0.6% increase from 2018).

In 2019, overnight stays were most common (54.3%). The median length of stay *for those staying overnight* was 2.00 nights (the same since 2014). Since the distribution of responses for this variable is not normal from a statistical perspective, the most reliable central tendency measure for describing trip duration is median. Figure 8 presents trip duration estimates.

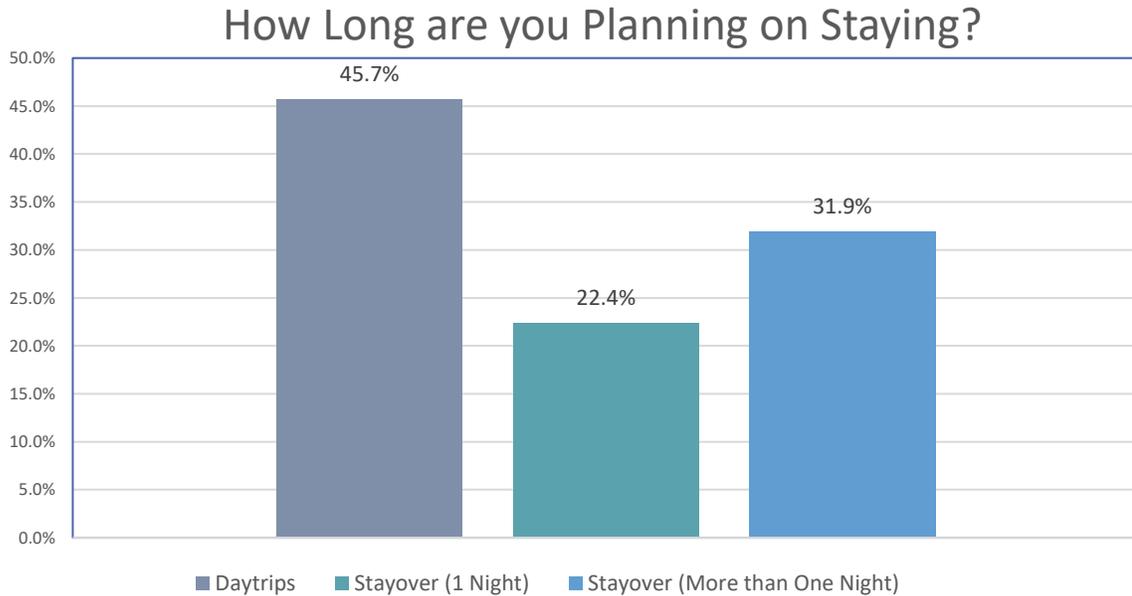


Figure 8

Length of Stay	Current Year 2019	Median Value in this Category Last 10 Years
Daytrip	45.7%	42.4%
Stayover (1 night)	22.4%	20.5%
Stayover (2 nights)	19.7%	18.0%
Stayover (3 nights)	6.6%	9.6%
Stayover (More than 3 nights)	5.6%	8.7%

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 (77.7%; an increase of 6.7% from 2018). Campground as accommodation was selected with a frequency of 11.5% (a 1.1% decrease from 2018). Bed and breakfast as an accommodation decreased to a 5.8% selection frequency (a 3.1% decrease from 2018). Staying with friends or family also decreased to 3.3% (1.3% less than 2018; see Figure 9).

## In what type of overnight accommodations are you staying?

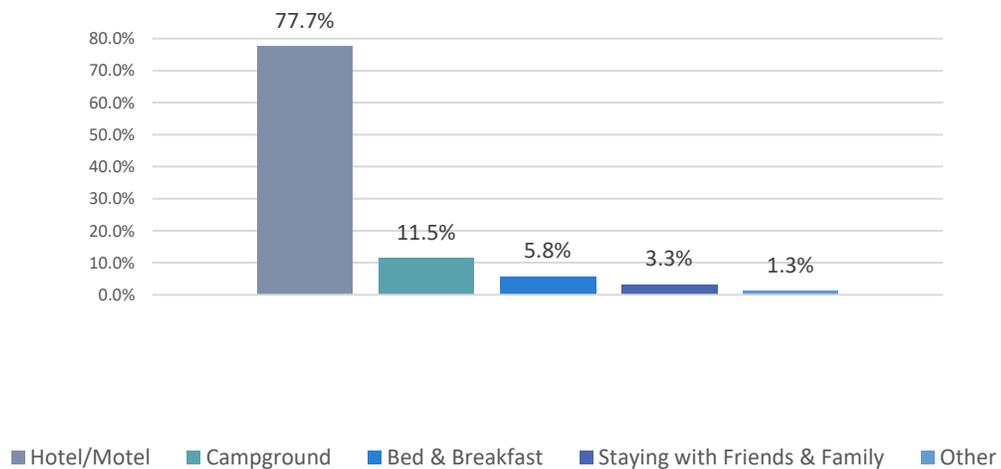


Figure 9

### 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 (97.0%; a 1.1% increase from last year). 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 (47.5%; 2.00 is the mode for this variable) (see Figure 10). Groups consisting of two visitors have been most common over the past 13 years of data. Visitor groups composed of *four* people were the second most common in 2019 (15.8%; a decrease of 1.8% compared to 2018). Groups consisting of *three* people were found in 13.5% of cases (a decrease of 1.6% from 2018). Figure 10 visually presents party size frequencies categorically. Group size for the current year is compared to the median value of all years in Table 5.

## What is your Group Size?

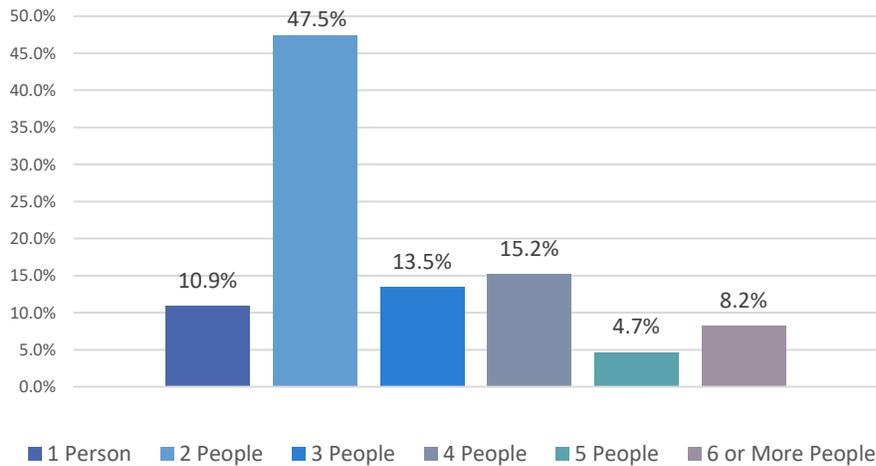


Figure 10

Group Size	Current Year 2019	Median Value for this Category Last 10 Years
1 Person	10.9%	6.7%
2 People	47.5%	44.5%
3 People	13.5%	14.2%
4 People	15.2%	15.3%
5 People	4.7%	6.1%
6 or More People	8.2%	13.6%

Table 5

In 2019, 76.2% of visitor groups consisted of 2, 3, or 4 individual visitors (0.6% increase from 2018). In 2019, 29.5% of *all* visitor groups reported having at least 1 child in the group. *Of the visitor groups with children*, 74.2% included 1 or 2 children (a 7.4% increase from 2018) (see Table 6).

Children or No Children	Current Year 2019	Median Value for this Category for 10 Years
Groups with at least 1 Child	29.5%	34.4%
Groups not reporting Children	70.5%	65.6%

Table 6

## DESTINATION CHOICE RESOURCES

The following section summarizes how visitors chose Gettysburg for their current trip in 2019. 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 or their current trip. Respondents were offered several potential marketing resources and were asked to choose the methods that applied to their 2019 trip. 43.4% identified *word of mouth or a referral* (a 19.9% increase from 2018). 40.7% identified a *previous visit* as the reason for this decision (a 1.9% decrease from 2018). 25.5% claimed to have used an *Information/Welcome Center* as a destination choice resource (an increase of 21.6% compared to the 3.9% who reported using an *Information or Welcome Center* in 2018). 13.8% used the *internet or a website* (a decrease of 5.9%). *Educational Institution* was selected as a destination choice resource in 6.7% of 2019 cases (5.2% less than in 2018). All other destination choice resources were identified in less than 5.0% of cases. Figure 11 presents the top five marketing resource choices.

## Use of Marketing Resources for Choosing Gettysburg as a Destination

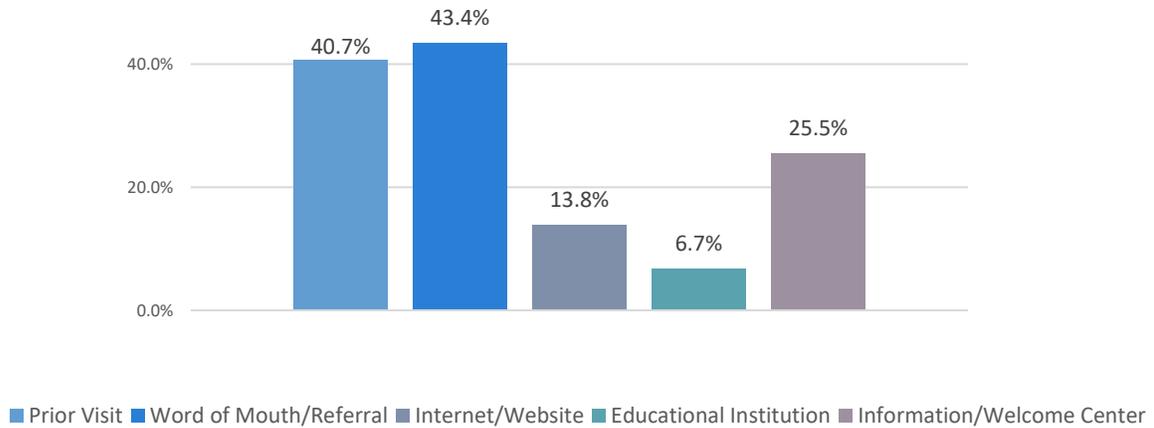


Figure 11

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

- Travel Book/Guide (3.5%),
- Social Media (2.2%),
- Billboards/Signs (1.2%),
- Brochures (1.2%),
- Magazine Articles (0.1%),
- Magazine Ads (0.1%).

The *Other* category consisted of that would not fit into any particular category. Common items mentioned in this category included Historical Interests, Convenience, or Work.

Table 7 presents the top five current year marketing resource response rates and compares them to the median value for each respective category over the past 10 years.

Marketing Resource	Current Year 2019	Median Value for this Category Last 10 Years
Prior Visit	40.7%	38.8%
Word of Mouth/Referral	43.4%	23.4%
Information/Welcome Center	25.5%	4.9%
Internet/Website	13.8%	23.2%
Educational Institution	6.7%	7.6%

Table 7

VISITOR SPENDING

In the third year of study, the research team was able to review spending data with a greater frame of reference. Spending data presentation was restructured based on two factors. First, the high variability of spending data weakened the usability of average and median spending estimates. Second, the frequency of bimodal data created a challenge where central tendency measures could not adequately represent a full set of data from a respective study year.

To resolve the variability problem, spending data are presented in figures that divide spending estimates into categories where *natural breaks* occur. Figure 12 presents categorical natural breaks for spending 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 such as average or median.

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## TOTAL SPENDING

Total spending, as a variable, follows a standard skewed distribution pattern. *The median total spending is \$175 per visitor group in 2019.* The median from 2016 to 2018 was \$200 per group. As previously mentioned, the median is a middle number not subjected to the influence of extremely high or low values (spending reports ranged from \$0 to \$2,500 per group in 2019).

In previous study years, Total Spending was divided between two groups. While the second spending group appears to be less visible this year, both groups are still present. There also seems to be some indication that a third spending group might be emerging beyond the \$400 spending level. Figure 12 displays all spending groups.

Visitor spending of \$400 or less was reported by 80.9% of all visitor groups (an increase of 8.3% compared to 2018).

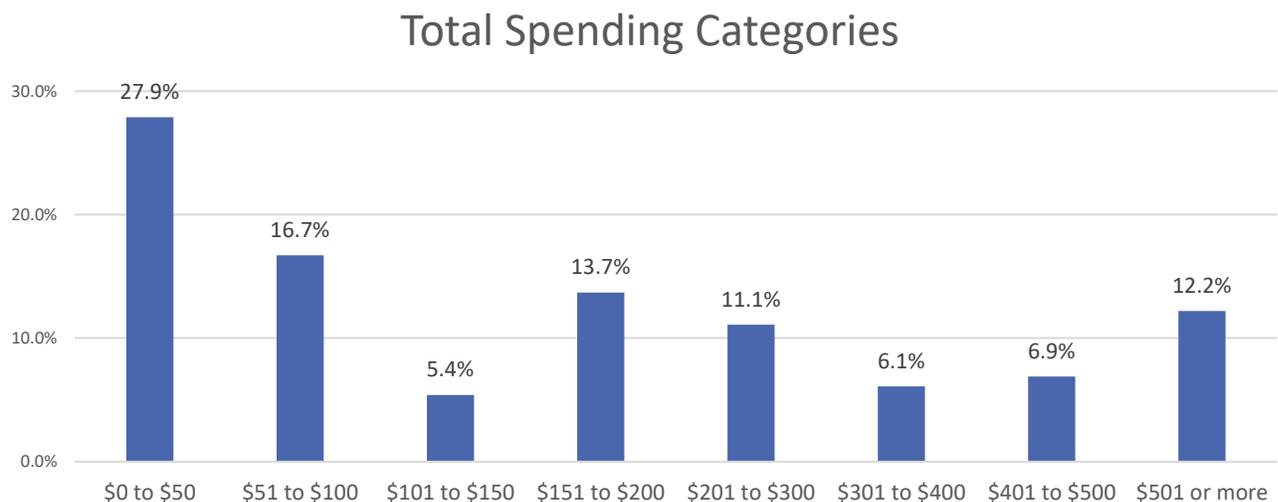


Figure 12

## 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, by far, was Gettysburg's

historical value. The list that follows contains a categorization of this open-ended question on visitor motivation. Each categorization is listed in order of response rate. The *Other* category consisted of the few responses that did not fit into any of the other categories. When describing the attractiveness of Gettysburg, or reasons that visitors were attracted to the destination, the top responses could be categorized as:

- Historical value (78.2%);
- Area Attractions or Events (12.2%);
- Friends, Family, or Heritage (4.2%);
- Convenience (1.8%);
- Curiosity (1.4%);
- Work (0.4%);
- Other (1.6%).

In 2019, interest in visiting the Gettysburg National Military Park was found in 95.2% of responses (a 4.5% increase compared to 2018). 4.8% of respondents did not visit or intend to visit the Gettysburg National Military Park on their current trip (see Figure 13).

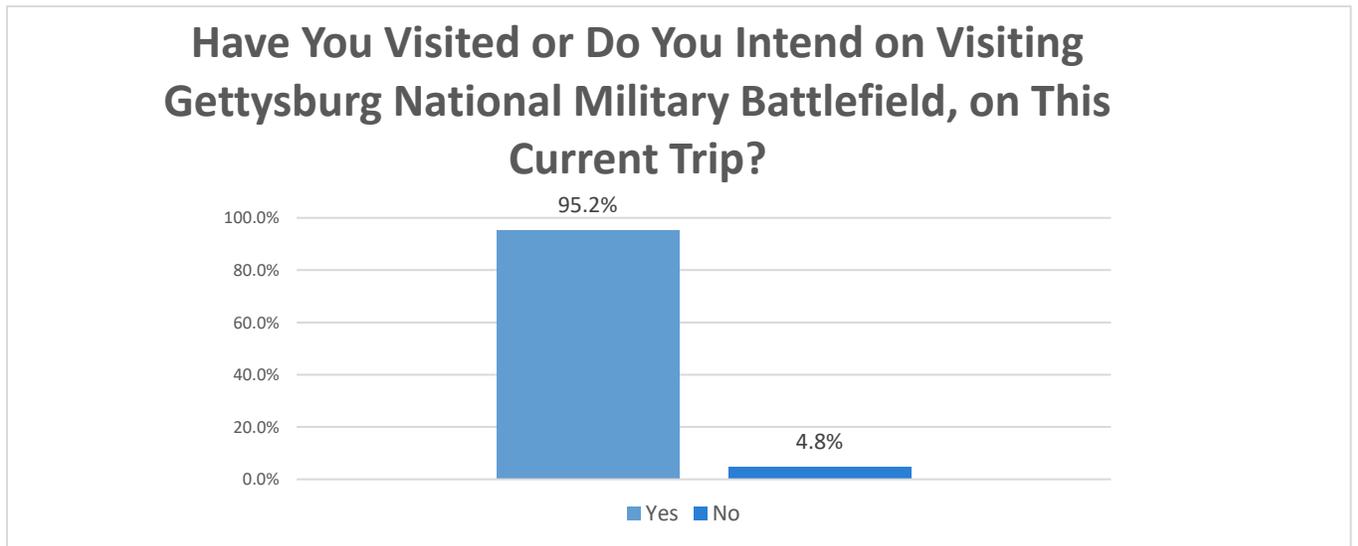


Figure 13

## 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 4.72 out of a possible 5.00 points (0.13 higher than in 2018). This means the majority of visitors (99.2%) rated their experience as “good” or “excellent,” but more frequently “excellent” thus indicating very high levels of visitor satisfaction in 2019.

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 4.26 out of 5 points (0.12 higher than in 2018). This means that the majority of visitors (81.4%) claim to be “likely” or “very likely” to return to Gettysburg for a repeat visit (an increase of 3.8% compared to 2018).

Visitors were also asked if they would recommend Gettysburg to others as a destination. 99.9% of visitors indicated that they would recommend Gettysburg to others (no change from last year; see Figure 14).

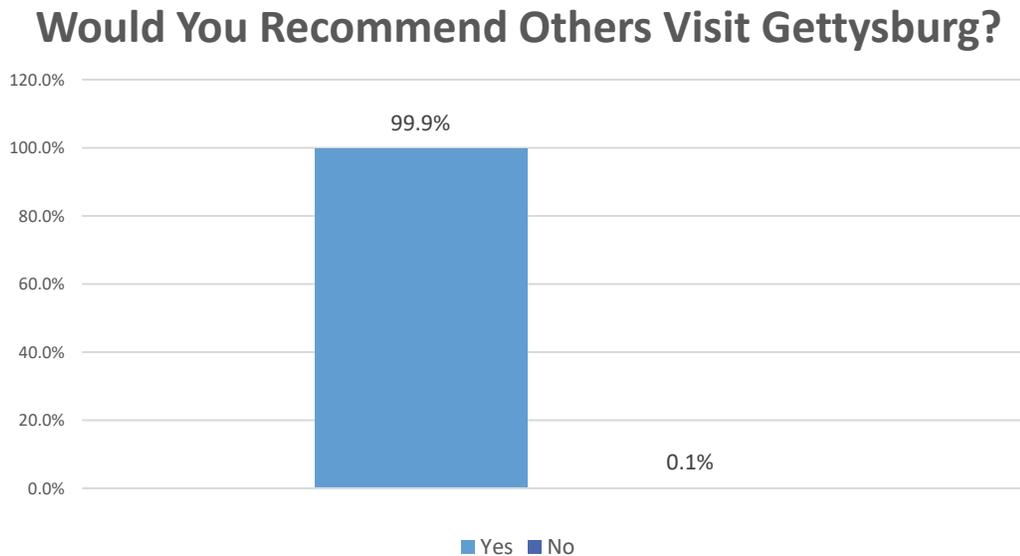


Figure 14

## CONCLUSIONS

This report has summarized the data collected for the 2019 Gettysburg Visitor Study. The 2019 study has included the collection and analysis of data from 734 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 median measures across several years of data. The California University of Pennsylvania Tourism Research Team is confident that this year's data report will assist the 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 the Destination Gettysburg in future efforts.

## APPENDIX A: TABLE FOR COMPARISON BY YEAR (SECTION 1)

In most cases except for average age, average values can be misleading. Average spending has been provided as a comparison to previous study years, when the average calculation was requested. Also, the **median value** of all study years is highlighted in bold print as a quick method for comparing the current year value to the middle value of all study years. Ten study years are shown in the tables below except for the specific exceptions listed after Section 3.

Descriptor	2019 Value	2018 Value	2017 Value	2016 Value	2015 Value	2014 Value	2013 Value	2012 Value	2011 Value	2010 Value
US Visitors <b>(97.25%)</b>	98.1%	97.2%	96.8%	97.4%	96.8%	95.8%	97.5%	96.7%	97.3%	98.5%
Non-US Visitors <b>(2.75%)</b>	1.9%	2.8%	3.2%	2.6%	3.2%	4.2%	2.5%	3.3%	2.7%	1.5%
Avg. Age	51	48	<b>52</b>	<b>52</b>	53	53	53	53	<b>52</b>	49
< 9th Grade <b>(0.15%)</b>	0.0%	0.1%	0.0%	0.1%	0.0%	0.6%	0.2%	0.5%	0.2%	1.1%
Some HS <b>(1.1%)</b>	2.9%	1.6%	1.5%	1.2%	0.7%	0.8%	0.0%	1.0%	0.8%	2.8%
HS Grad only <b>(12.4%)</b>	11.6%	14.7%	13.2%	13.5%	11.2%	9.8%	10.3%	14.5%	14.4%	11.5%
College no deg. <b>(15.6%)</b>	11.6%	15.3%	17.7%	17.1%	12.8%	17.1%	15.4%	15.7%	14.3%	17.2%
Associate Deg. <b>(10.4%)</b>	6.4%	8.5%	<b>10.4%</b>	11.3%	13.8%	10.0%	10.3%	14.5%	9.7%	15.5%
Bachelor's Deg. <b>(31.1%)</b>	29.3%	38.7%	27.3%	27.8%	40.1%	38.6%	27.7%	32.8%	33.5%	26.9%
Grad/Pro. Deg. <b>(26.0%)</b>	38.2%	21.0%	29.9%	29.1%	20.4%	23.2%	36.1%	21.0%	27.0%	25.0%
Some college + <b>(85.3%)</b>	85.5%	83.5%	<b>85.3%</b>	<b>85.3%</b>	87.1%	88.9%	89.5%	84.0%	84.5%	84.6%
Degree >HS Dip. <b>(69.3%)</b>	73.9%	68.2%	67.6%	66.7%	74.3%	71.8%	74.1%	68.3%	70.2%	67.4%
\$75,000-\$99,999 <b>(17.8%)</b>	23.7%	19.2%	20.3%	16.8%	11.2%	13.7%	13.7%	19.3%	18.8%	10.4%
\$60,000-\$74,999 <b>(13.3%)</b>	19.4%	12.7%	11.3%	14.0%	13.0%	12.2%	12.7%	14.5%	15.9%	13.5%
\$100K-\$124,999 <b>(11.8%)</b>	12.0%	11.7%	11.0%	10.8%	6.4%	13.7%	12.9%	11.9%	13.5%	8.0%
\$50,000-\$59,999 <b>(12.2%)</b>	11.7%	12.5%	9.3%	12.5%	13.4%	10.9%	9.8%	14.5%	11.9%	18.9%

\$125K-\$149,999 (7.1%)	10.2%	6.4%	8.4%	7.7%	4.0%	8.4%	8.2%	6.3%	5.3%	6.1%
\$40,000-\$49,999 (9.8%)	8.6%	11.2%	7.9%	10.3%	17.4%	9.1%	8.1%	9.6%	9.9%	14.0%
\$30,000-\$39,999 (6.7%)	4.0%	7.3%	6.6%	8.5%	17.3%	5.8%	6.7%	4.6%	5.9%	7.9%
\$200K or more (4.9%)	3.5%	3.1%	6.8%	5.5%	1.6%	5.0%	11.7%	4.8%	4.9%	2.9%
\$20,000-\$29,999 (4.4%)	2.3%	2.4%	4.9%	2.3%	5.8%	4.6%	3.4%	4.6%	4.2%	9.6%
\$10,000-\$19,999 (2.4%)	2.0%	5.0%	2.4%	1.8%	3.5%	2.5%	2.3%	0.7%	1.9%	3.0%
\$150K-\$199,999 (5.7%)	2.0%	4.6%	8.0%	6.2%	2.0%	7.8%	8.9%	6.6%	5.1%	3.7%
Less than \$10,000 (2.9%)	0.6%	3.7%	3.1%	3.7%	4.4%	6.3%	1.6%	2.6%	2.7%	1.9%
< \$50,000 (25.8%)	17.5%	29.6%	24.9%	26.6%	48.3%	28.3%	22.1%	22.1%	24.6%	36.4%
\$50,000-\$99,999 (43.1%)	54.8%	44.4%	40.9%	43.3%	37.6%	36.8%	36.2%	48.3%	46.6%	42.8%
\$100K-\$199,999 (24.5%)	24.2%	22.7%	27.4%	24.7%	12.4%	29.9%	30.0%	24.8%	23.9%	17.8%

APPENDIX A: TABLE FOR COMPARISON BY YEAR (SECTION 2)

Descriptor	2019 Value	2018 Value	2017 Value	2016 Value	2015 Value	2014 Value	2013 Value	2012 Value	2011 Value	2010 Value
Female visitors <b>(48.2%)</b>	51.1%	45.9%	48.8%	47.5%	47.3%	48.8%	54.1%	51.6%	41.8%	47.2%
Male visitors <b>(51.9%)</b>	48.9%	54.1%	51.2%	52.5%	52.7%	51.2%	45.9%	48.4%	58.2%	52.8%
1st GB Trip <b>(42.5%)</b>	51.0%	39.3%	40.0%	41.8%	47.1%	46.2%	41.2%	46.7%	48.1%	43.3%
Not 1st GB Trip <b>(57.5%)</b>	49.0%	60.7%	60.0%	58.2%	52.9%	53.8%	58.8%	53.3%	51.9%	56.7%
Purpose: Pleasure <b>(87.4%)</b>	81.7%	87.7%	85.6%	87.6%	88.5%	83.1%	87.2%	88.6%	88.2%	82.7%
Purpose: Family <b>(8.8%)</b>	13.9%	8.6%	9.6%	8.7%	6.7%	11.3%	8.9%	6.4%	7.8%	10.3%
Purpose: Business <b>(4.8%)</b>	4.4%	3.7%	4.8%	3.7%	4.8%	5.6%	3.9%	5.0%	4.0%	7.0%
GB Main Dest. <b>(80.7%)</b>	81.7%	80.3%	79.6%	81.0%	86.1%	84.5%	79.0%	70.0%	71.7%	87.3%
GB One/many Dest. <b>(14.8%)</b>	13.9%	15.1%	17.3%	14.4%	12.0%	13.7%	17.0%	26.6%	23.0%	9.2%
GB Not planned De. <b>(3.8%)</b>	4.4%	4.6%	3.1%	4.6%	1.9%	1.8%	4.0%	3.4%	5.3%	3.5%
<b>Median Length of Stay*</b>	2.00	2.00	2.00	2.00	2.00	2.00	1.00	1.00	1.00	1.00
Stay: Day <b>(42.4%)</b>	45.7%	41.1%	44.3%	35.1%	59.4%	50.4%	40.3%	38.8%	38.5%	43.6%
Stay: 1 Night <b>(20.5%)</b>	22.4%	21.8%	13.7%	13.3%	13.1%	14.8%	25.3%	19.9%	21.0%	22.2%
Stay: 2 Nights <b>(18.0%)</b>	19.7%	17.4%	18.1%	27.5%	15.8%	19.9%	17.0%	19.0%	17.8%	15.4%
Stay: 3 Nights <b>(9.6%)</b>	6.6%	11.7%	14.0%	12.5%	6.4%	7.7%	8.5%	12.7%	10.6%	8.1%
Stay: (> 3 nights) <b>(8.7%)</b>	5.6%	7.9%	9.9%	10.4%	5.3%	7.2%	8.1%	9.6%	12.0%	9.2%
GB accommodation <b>(56.5%)</b>	90.2%	90.9%	91.0%	90.2%	10.9%	38.5%	45.7%	21.2%	49.7%	63.2%
Staying, % hotel <b>(69.8%)</b>	77.7%	71.0%	70.8%	66.6%	68.7%	72.7%	66.3%	70.3%	69.2%	65.2%

Staying, % camp <b>(12.2%)</b>	11.5%	12.9%	12.9%	14.9%	17.3%	11.3%	11.1%	10.3%	13.3%	9.2%
Staying, % bed & breakfast	5.8%	<b>8.9%</b>	8.8%	8.7%	6.1%	6.8%	17.2%	12.4%	10.9%	18.0%
Staying, % friends/relatives	3.3%	<b>4.6%</b>	2.9%	3.7%	4.9%	6.8%	4.2%	4.7%	4.5%	6.6%
Of those staying, % Other	1.6%	3.0%	4.5%	6.7%	4.0%	<b>2.4%</b>	1.1%	<b>2.4%</b>	2.0%	0.9%
<b>Median Party Size</b>	<b>2.00</b>	3.00	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	3.00	<b>2.00</b>	<b>2.00</b>	3.00	<b>2.00</b>
Group size of: 1 <b>(6.7%)</b>	10.9%	5.6%	6.2%	5.5%	6.6%	7.9%	6.8%	5.0%	8.2%	7.7%
Group size of: 2 <b>(44.5%)</b>	47.5%	43.5%	43.9%	44.7%	45.4%	39.7%	48.6%	55.8%	40.4%	44.2%
Group size of: 3 <b>(14.2%)</b>	13.5%	15.1%	14.8%	12.6%	12.0%	15.8%	15.8%	12.2%	13.7%	14.6%
Group size of: 4 <b>(15.3%)</b>	15.2%	17.0%	15.1%	15.4%	15.7%	17.2%	10.9%	12.6%	15.6%	14.9%
Group size of: 5 <b>(6.1%)</b>	4.7%	7.4%	6.3%	8.0%	6.8%	4.0%	4.2%	4.4%	7.1%	5.8%
Group size: 6 or more	8.2%	11.4%	<b>13.6%</b>	13.9%	13.5%	15.4%	13.7%	10.0%	15.0%	12.8%

APPENDIX A: TABLE FOR COMPARISON BY YEAR (SECTION 3)

Descriptor	2019 Value	2018 Value	2017 Value	2016 Value	2015 Value	2014 Value	2013 Value	2012 Value	2011 Value	2010 Value
Groups with at least 1 child	29.5%	<b>34.4%</b>	34.3%	65.7%	27.3%	58.8%	47.7%	21.7%	32.4%	35.6%
Groups without children	70.5%	65.6%	<b>65.7%</b>	34.3%	72.7%	41.2%	52.3%	79.3%	67.6%	64.4%
Median under age 18	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	1.00	<b>0.00</b>	1.00	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Med.<18(w/children only)	<b>2.00</b>									
Decision: Referral ( <b>23.4%</b> )	43.4%	23.5%	19.7%	25.1%	31.3%	21.4%	23.2%	22.9%	20.4%	23.9%
Prior visit ( <b>38.8%</b> )	40.7%	42.8%	38.2%	44.2%	39.0%	37.3%	44.3%	36.2%	36.8%	38.5%
Information/Welc Ctr ( <b>4.9%</b> )	25.5%	3.9%	2.2%	2.4%	0.5%	5.5%	16.7%	8.4%	4.2%	9.2%
Internet/website ( <b>23.2%</b> )	13.8%	19.7%	15.2%	22.7%	26.7%	35.4%	41.5%	23.6%	19.7%	36.8%
Edu. Institution ( <b>7.6%</b> )	6.7%	11.9%	8.8%	6.0%	3.6%	6.5%	4.2%	8.7%	13.3%	8.4%
<i>Avg. Spent on Total Trip<sup>1</sup></i>	<i>\$267.60</i>	<i>\$372.97</i>	<i>\$336.28</i>	<i>\$272.84</i>	<i>\$375.77</i>	<i>\$535.46</i>	<i>\$616.97</i>	<i>\$553.76</i>	<i>\$439.39</i>	<i>\$426.86</i>
Visiting Military Park	95.2%	90.7%	92.5%	94.4%	97.4%	89.0%	96.4%	<b>94.5%</b>	97.2%	94.3%
Avg. GB satisfaction*	4.72	4.59	4.69	4.70	4.65	4.70	4.71	4.63	4.71	4.58
Returning? (1-5 scale)**	4.26	4.14	4.17	4.07	4.07	4.17	4.28	4.10	4.13	4.23
Recommend to others	99.9%	99.9%	<b>99.8%</b>	<b>99.8%</b>	99.9%	99.5%	<b>99.8%</b>	99.7%	<b>99.8%</b>	99.7%

<sup>1</sup> All values are shown in 2020 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.

\*GB Median Satisfaction last 10 years is 4.70.

\*\*Median for Returning? (1-5 scale) last 10 years is 4.16.

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: COPY OF VISITOR SURVEY



**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. You may discontinue at anytime. 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. In what year were you born?

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

3. Is this your first visit to Gettysburg?  Yes  No
4. What is the primary purpose of your visit today?  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?  More than one night (go to Q6B)  One night (go to Q6C)  One day or less (go to Q7)  
 Undecided (go to Q7)
- 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?  Yes (go to Q6D)  No (go to Q7)
- 6d. At what type of overnight accommodation in Gettysburg are you staying?  Hotel/Motel  Bed and Breakfast  Campground  
 Staying with Friends or Family  Other (please specify) \_\_\_\_\_
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 (do not ask, use Q8 info to complete)?  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  Brochure  Travel Book/Guide  Magazine Ad  Magazine Article  Social Media (if checked, go to Q10B)  
 Internet  Word of Mouth/Referral  Return Visit  Educational Institution  Information/Welcome Center  
 Special Coupons/Offer  Other (please specific) \_\_\_\_\_

10b. If you used social media to make your decision, please specify which network(s) you used \_\_\_\_\_

11. What attracted you to choose Gettysburg as the destination for your current trip? \_\_\_\_\_

12. Have you visited or do you intend on visiting the Gettysburg National Military Battlefield on this current trip (do not ask if intercept point is NMP)?  Yes  No

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

13. 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? \_\_\_\_\_

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

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

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

16. 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.*

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

- A. Less than 9<sup>th</sup> 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

18. 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: \_\_\_\_\_



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