

Centre County Visitor Intercept Study Complete Sample

5/28/2019-2/29/2020



PennState
College of Health and
Human Development

Recreation, Park, and Tourism Management

A 10-Month Investigation of Visitors to Centre County, PA

Prepared for The Happy Valley Adventure Bureau

July 2020



PennState
College of Health and
Human Development

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Recreation, Park, and Tourism Management

EXECUTIVE SUMMARY

What is the demographic profile of visitors to Centre County?

- A majority of visitors to Centre County were 38-72 years old, made over \$75,000 per year, worked full time, and were highly educated. A majority were from Pennsylvania, with most other visitors coming from bordering destinations. At the metro area level, most visitors were from Pittsburgh, Philadelphia, New York City, Harrisburg, and Washington D.C.

What is the main purpose of visitors' travel to Centre County?

- Almost one-third of all visitors stated that their main purpose was to visit friends and family. Two-thirds of visitors stated that their visitation to Centre County was related to Penn State.

What attractions do visitors frequent in Centre County?

- The main attractions frequented by visitors were Penn State sporting events, concerts, and natural areas.

EXECUTIVE SUMMARY

What activities do visitors participate in while visiting Centre County?

- The most common activities that visitors participated in included culinary experiences, sightseeing, and shopping. Nature-based activities also represented a significant portion of activity participation.

What perceptions do visitors have of Centre County (e.g., destination image, relative friendliness of people)?

- Visitors perceived Centre County as the home of Penn State and Penn State football, but also as the home of family. Furthermore, visitors also perceived the area as beautiful and filled with mountainous geography. Common imagery visitors associated with Centre County were related to Penn State, such as the Nittany Lion Shrine, Beaver Stadium, and Old Main.

EXECUTIVE SUMMARY

What sources of information do visitors use to make decisions about their trips to Centre County?

- The most common online information sources used were search engines, mapping websites, and event websites. A majority of visitors did not use offline information sources. The most common offline information source used was friends and family.

What are the travel patterns/trip characteristics of visitors to Centre County (e.g., length of stay, revisit intentions)?

- Visitors had a high level of past travel experience, with over half stating that they have visited Centre County more than 6 times. On average, visitors spent around 2 nights in Centre County in a group of 2 adults and 0 children.

EXECUTIVE SUMMARY

What is the satisfaction level of visitors to Centre County?

- On average, visitors rated every aspect of their current visit to Centre County as satisfactory.
- The most satisfied aspects of their visits to Centre County were the feeling of safety, attractiveness of natural areas, and quality of sporting events.
- Out of the 26 aspects rated by visitors, nature-based aspects were rated within the top 7 most satisfied aspects.

STUDY OVERVIEW

STUDY OVERVIEW

The Happy Valley Adventure Bureau (hereafter referred to as *HVAB*) promotes visitation to all of Centre County, Pennsylvania. The leadership team at *HVAB* is interested in better understanding visitors to the area, specifically:

1. Evaluating visitation composition and spending associated with travel in the targeted area throughout the year;
2. Evaluating visitors' perceptions of Centre County as a tourism destination.

Penn State's Department of Recreation, Park and Tourism Management (hereafter referred to as *PSU*) was commissioned to conduct a visitor intercept study.

STUDY OVERVIEW

The purpose of the visitor intercept study was to investigate the demographic background, behavioral profile, and satisfaction of visitors to Centre County. This study can be used to establish a benchmark for comparative purposes in the future.

PSU designed and executed a comprehensive data collection strategy that spanned a 12-month period and was representative of tourism demand in Centre County. Due to the COVID-19 pandemic, data collection was suspended in early March of 2020. Accordingly, the results are based on 10-months of data collection. The research team worked with *HVAB* to finalize the survey instrument and select the sampling sites. Visitors were surveyed on-site about their current trip.

STUDY OVERVIEW

The primary objectives of the visitor intercept study were to answer the following questions:

- › What is the demographic profile of visitors to Centre County?
- › What is the main purpose of visitors' travel to Centre County?
- › What attractions do visitors frequent in Centre County?
- › What activities do visitors participate in Centre County?
- › What benefits do visitors seek when they participate in activities in Centre County?
- › What perceptions do visitors have of Centre County (e.g., destination image, relative friendliness of people)?
- › What sources of information do visitors use to make decisions about their trips to Centre County?
- › What are the travel patterns/trip characteristics of visitors to Centre County (e.g., length of stay)?
- › What is the satisfaction level of visitors to Centre County?

STUDY OVERVIEW

This study can be used to establish a benchmark for comparative purposes in the future. The results from this study provide *HVAB* with up-to-date information needed to position the county and provide guidance for a comprehensive marketing plan focused on specific market segments. More specifically, the visitor intercept data can help uncover areas of opportunity and assist with formulating marketing strategies. It will enable *HVAB* to have an ongoing evaluation of tourism trends and identify potential growth markets or market segments.

DATA COLLECTION

DATA COLLECTION

Data was collected between May 28th, 2019 and February 29th, 2020.

Trained surveyors administered the surveys at accommodations, attractions, and special events that represented different geographic locations in Centre County.

The data collection shifts occurred during both weekends (Friday-Sunday) and weekdays (Monday-Thursday), as well as during both mornings and afternoons.

One standardized survey instrument was used at all sites. The survey instrument included well-structured closed-ended questions and a liberal dose of open-ended questions.

The survey was administered via the Qualtrics Offline Surveys App on iPads.

NUMBER OF COMPLETED SURVEYS



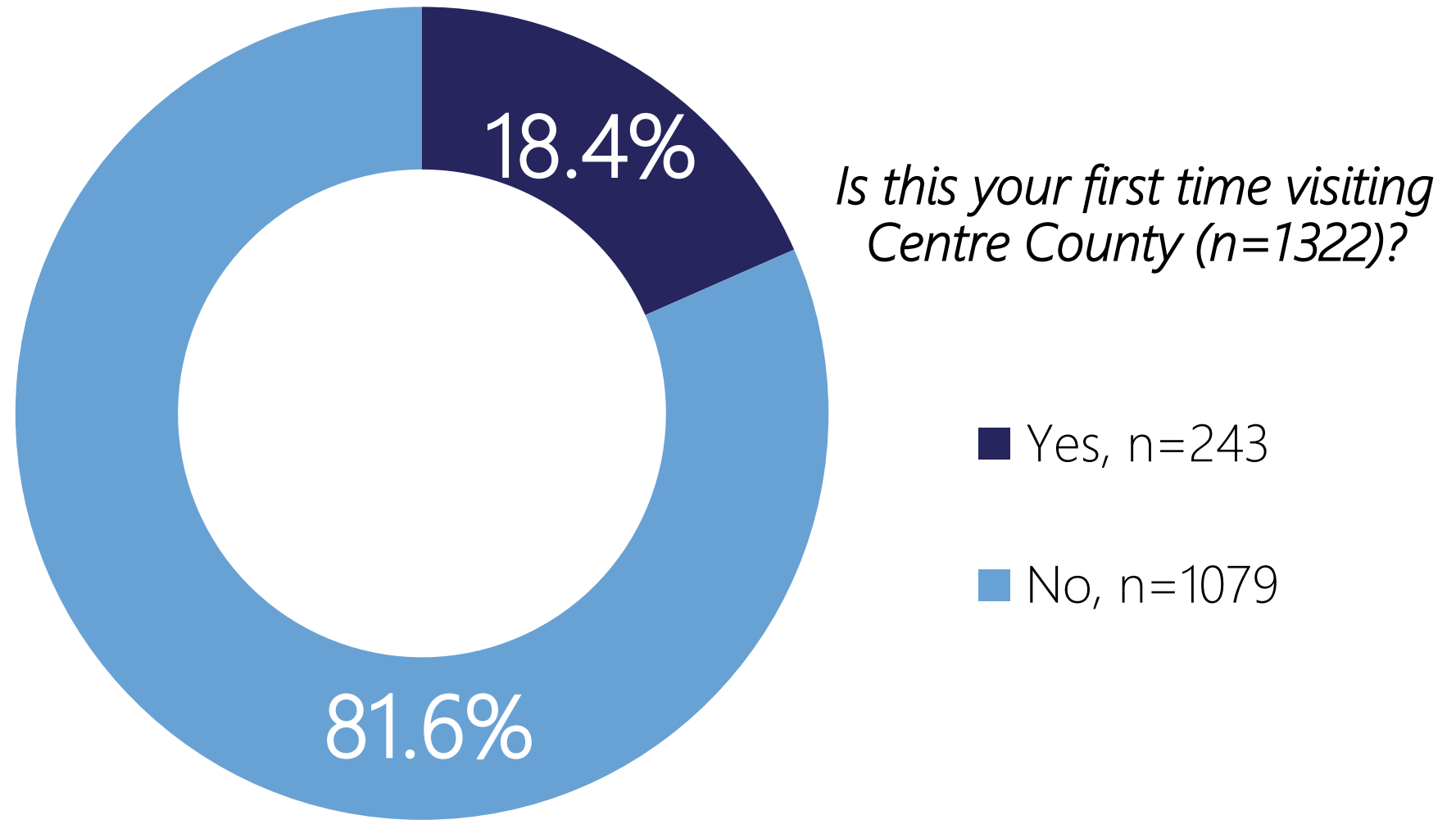
Total Sample Size = 1,334

DATA COLLECTION SITES

ATTRACTIONS	EVENTS	ACCOMMODATIONS
Bellefonte Satellite Visitor Center	Central PA 4th Fest	Days Inn
Centre County/Penn State Visitor Center	Central PA Festival of the Arts	Hilton Garden Inn
Downtown State College	Centre County Grange Fair	Nittany Lion Inn
Penn State Berkey Creamery	Father's Day Weekend	The Penn Stater Hotel & Conference Center
The Arboretum at Penn State	Happy Valley Music Fest	Wyndham Garden
The Nittany Lion Shrine	Outdoor Adventure Expo	
The Palmer Museum of Art	Penn State Football	
Snow Shoe Trail	People's Choice Festival	
Tussey Mountain	Philipsburg Heritage Days	

PAST TRAVEL EXPERIENCE

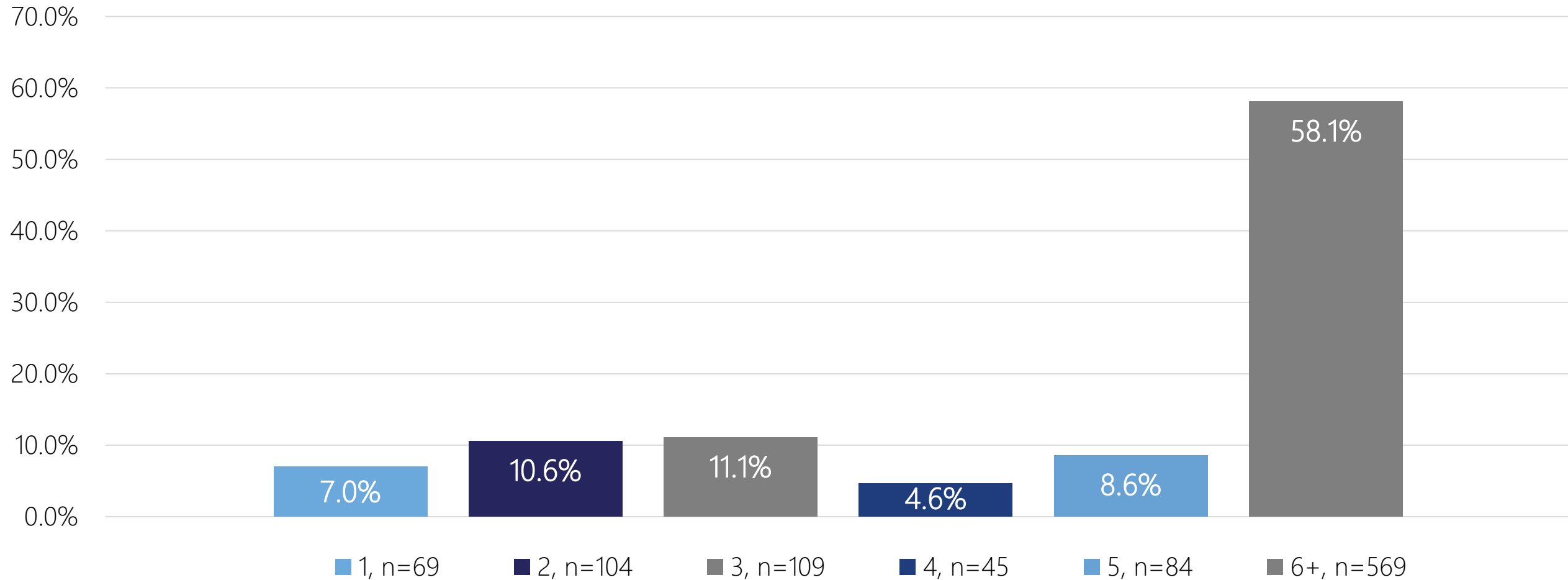
PAST TRAVEL EXPERIENCE



Over three-quarters (81.6%) of visitors were repeat visitors.

EXTENT OF REPEAT VISITATION

In the past 3 years, how many other times have you visited Centre County (n=980)?



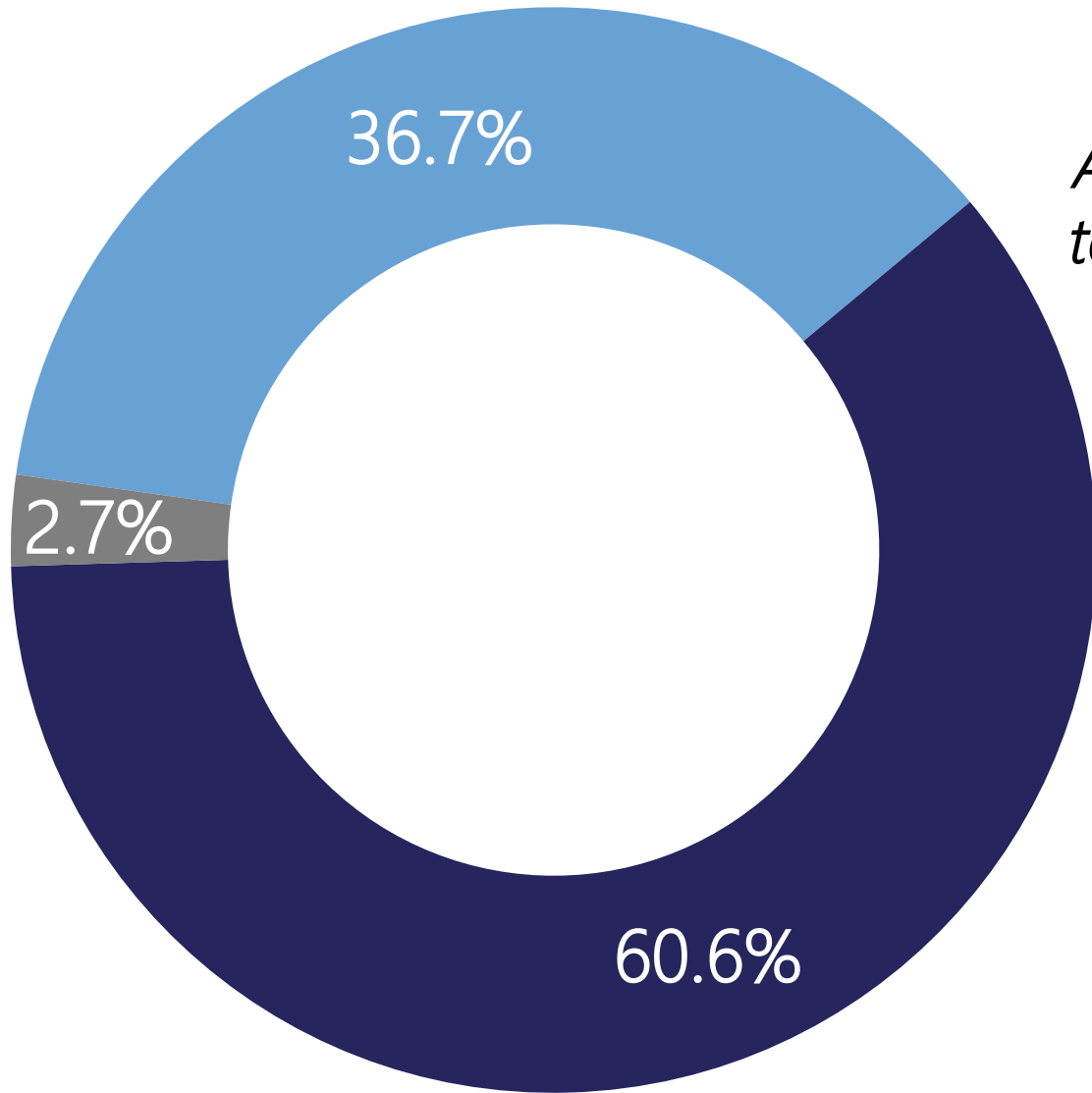
More than half (58.1%) of visitors had visited Centre County 6 times or more.

DESTINATION IMAGE

**DAY TRIP &
OVERNIGHT
VISITORS**

DAY TRIP VS. OVERNIGHT VISITS

Are you in Centre County on a day trip, with plans to return home today? Or are you spending one or more nights in Centre County (n=1227)?

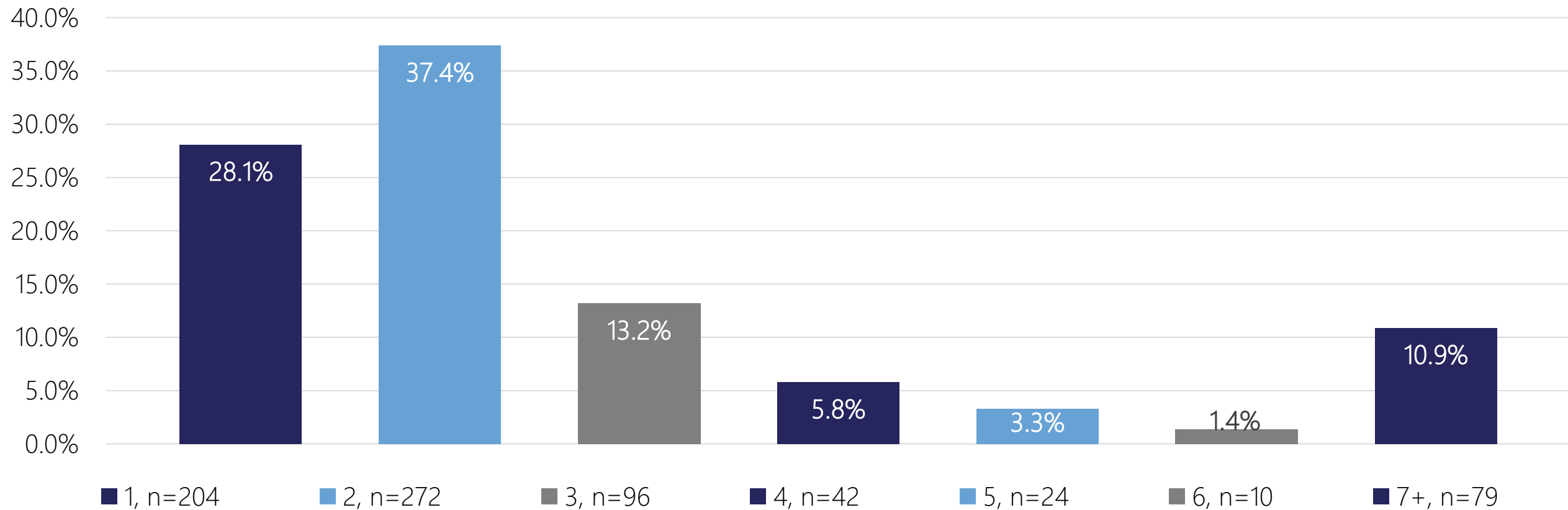


- Day Trip, n=450
- Staying Overnight, n=744
- Not Sure / Prefer Not To Answer, n=33

A majority of visitors (60.6%) were overnight visitors.

NIGHTS AWAY FROM HOME – OVERNIGHT VISITORS

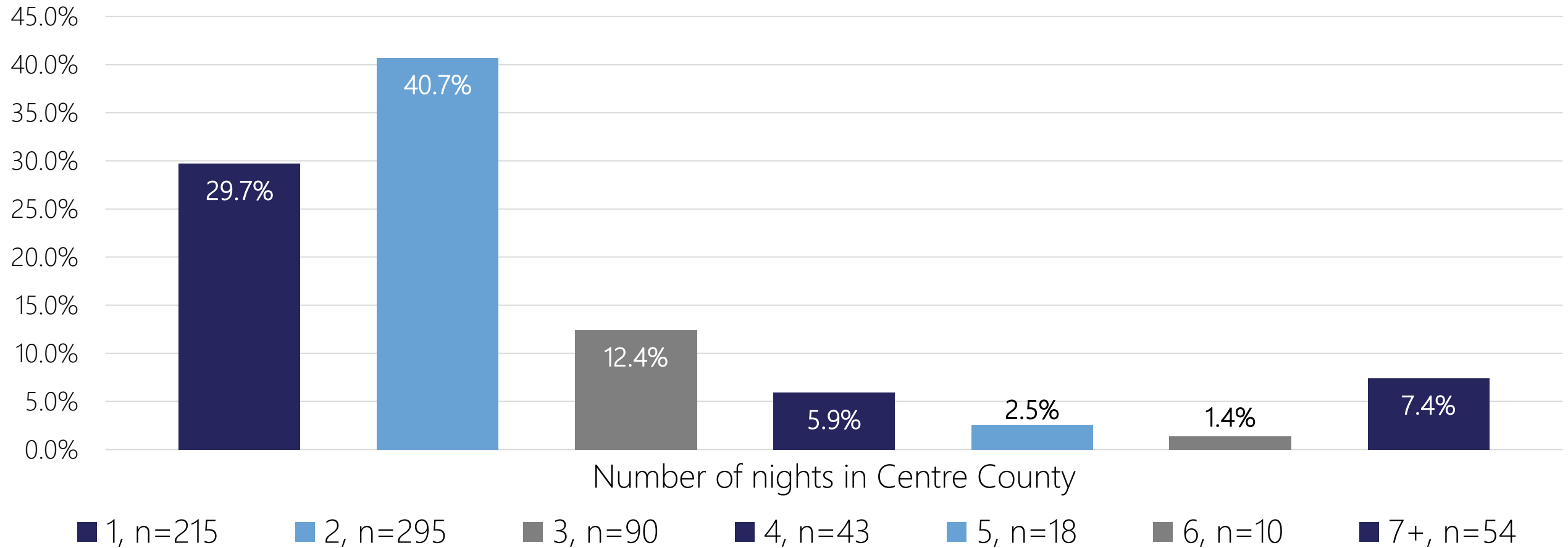
On this trip, how many total nights will you spend away from home? Please include nights you spent traveling to Centre County, even if they were in other states or regions (n=727).



Excluding day trippers, 65.5% of visitors were spending 1 or 2 nights away from home.

NIGHTS SPENT IN CENTRE COUNTY – OVERNIGHT VISITORS

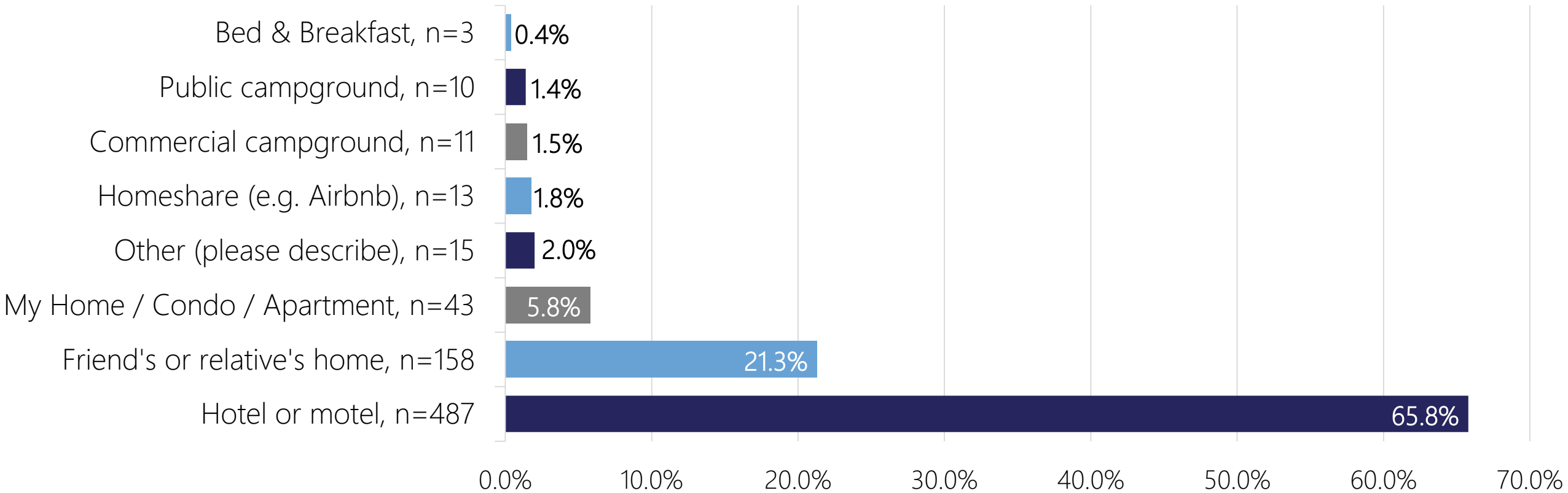
On this trip, how many nights will you spend in Centre County (n=725)?



Excluding day trippers, 70.4% of visitors were spending 1 or 2 nights in Centre County.

ACCOMMODATIONS USED BY OVERNIGHT VISITORS

*What type of lodging or accommodations are you using in Centre County?
Please mark ALL that apply.*

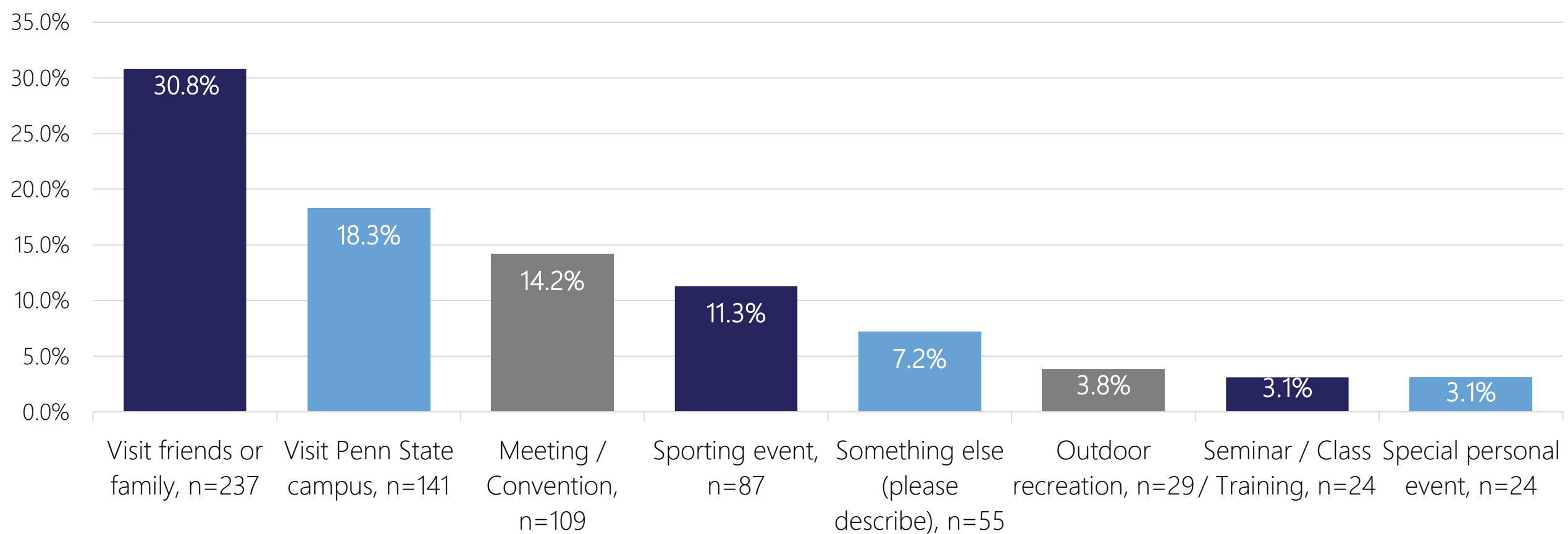


Excluding day trippers, when visiting Centre County, about two-thirds (65.8%) of visitors stayed in a hotel or motel.

PRIMARY PURPOSE OF VISIT

MAIN PURPOSE OF VISIT

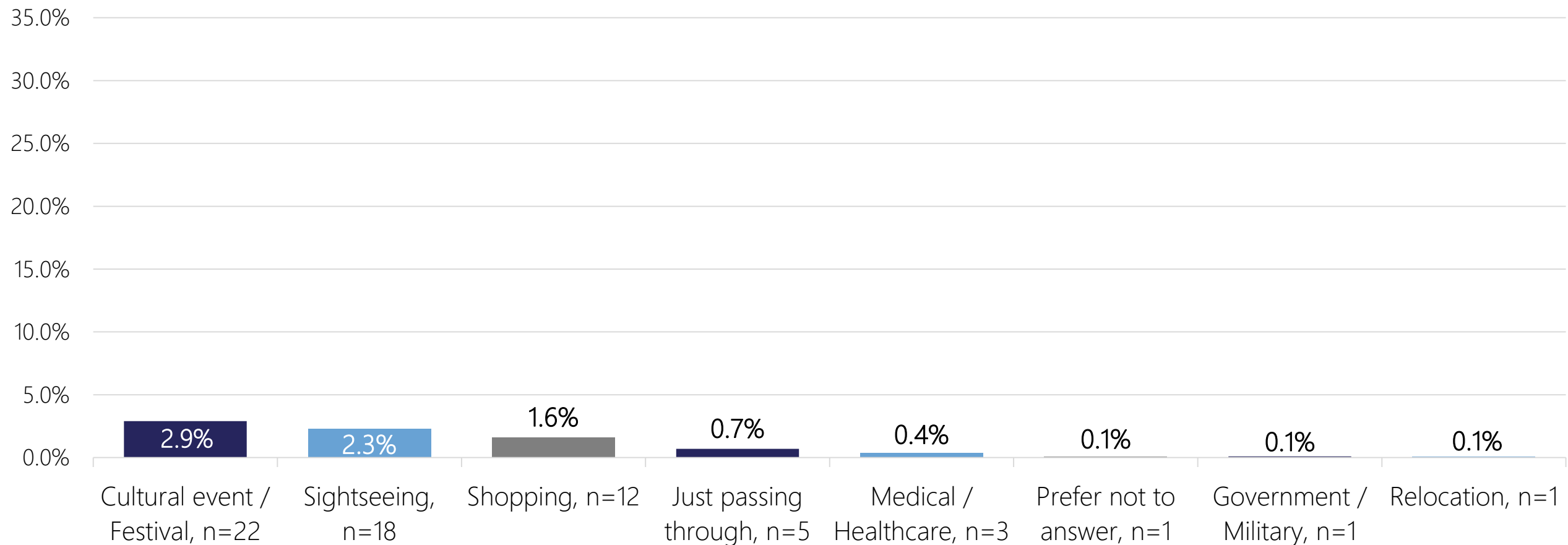
What is the most important purpose of your visit to Centre County? Please select the purpose without which this trip would not take place (n=769).



Excluding visitors intercepted at an event, the main purpose of visiting Centre County was to visit friends or family (30.8%).

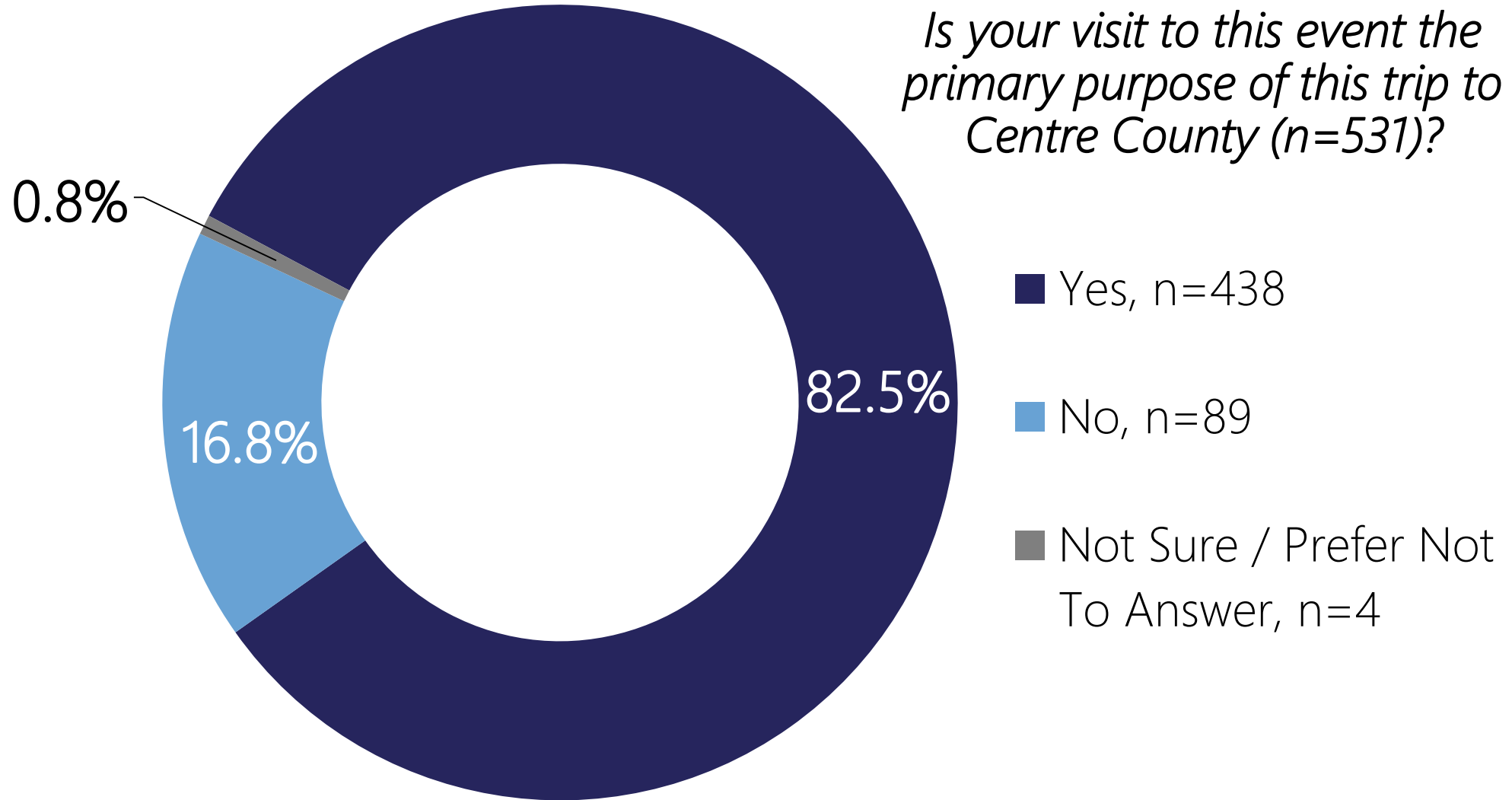
MAIN PURPOSE OF VISIT

What is the most important purpose of your visit to Centre County? Please select the purpose without which this trip would not take place (n=769).



MAIN PURPOSE OF VISIT FOR EVENT RESPONDENTS

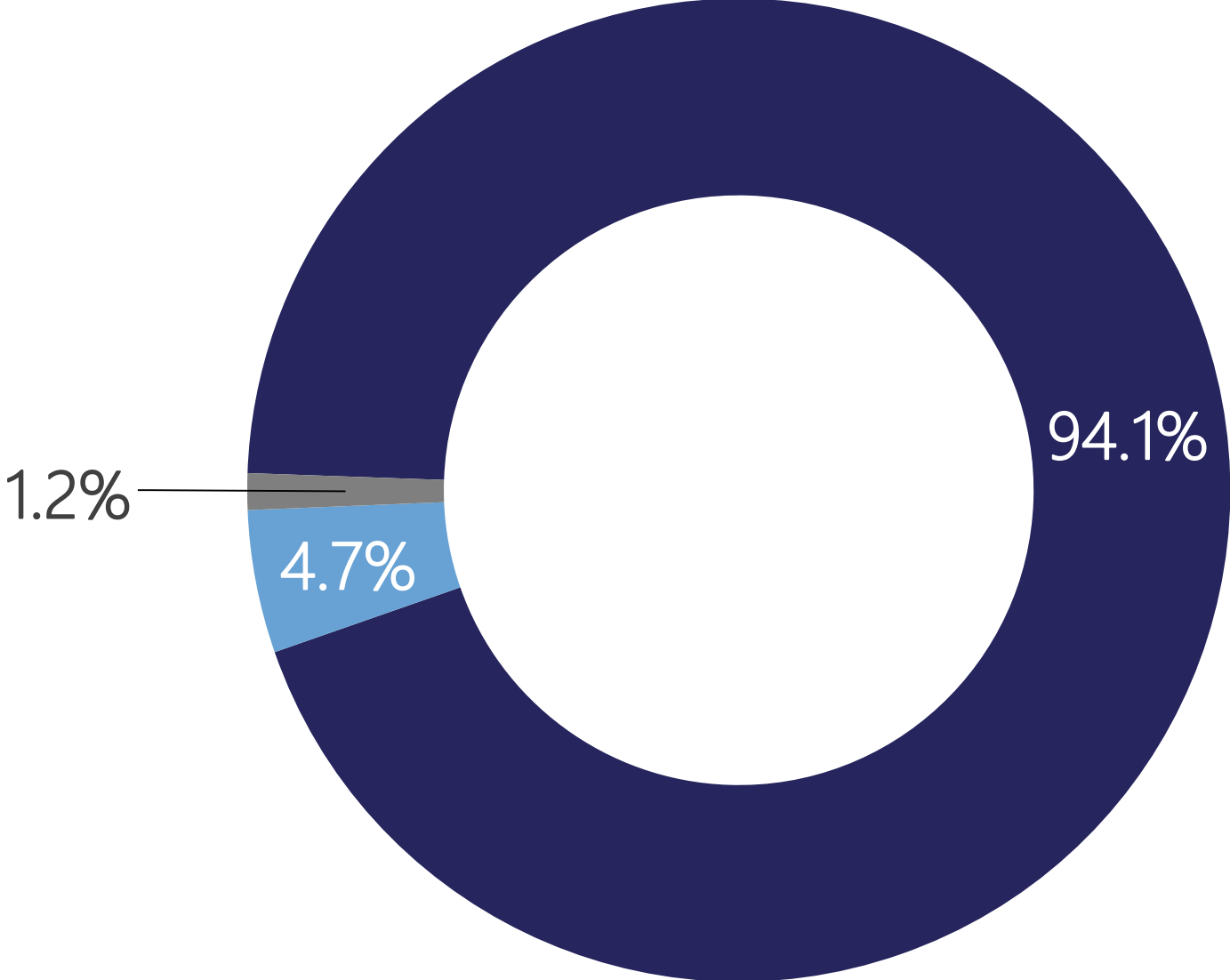
*Is your visit to this event the
primary purpose of this trip to
Centre County (n=531)?*



For visitors intercepted at an event,
82.5% indicated that the event was the primary purpose of their trip to Centre County.

**PRIMARY
DESTINATION
VISITED &
CONSIDERED**

PRIMARY DESTINATION



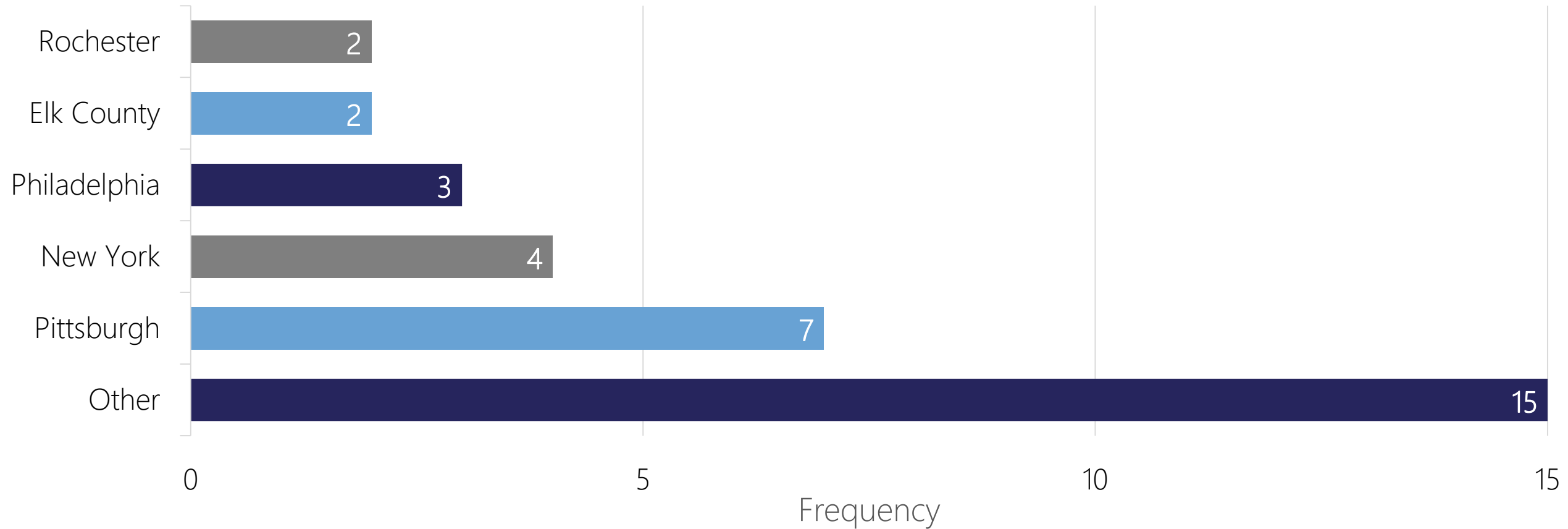
Is Centre County your primary destination on this trip (n=1204)?

- Yes, n=1133
- No, n=56
- Not Sure / Prefer Not To Answer, n=15

Almost all (94.1%) visitors indicated that Centre County was their primary destination.

PRIMARY DESTINATION OTHER THAN CENTRE COUNTY

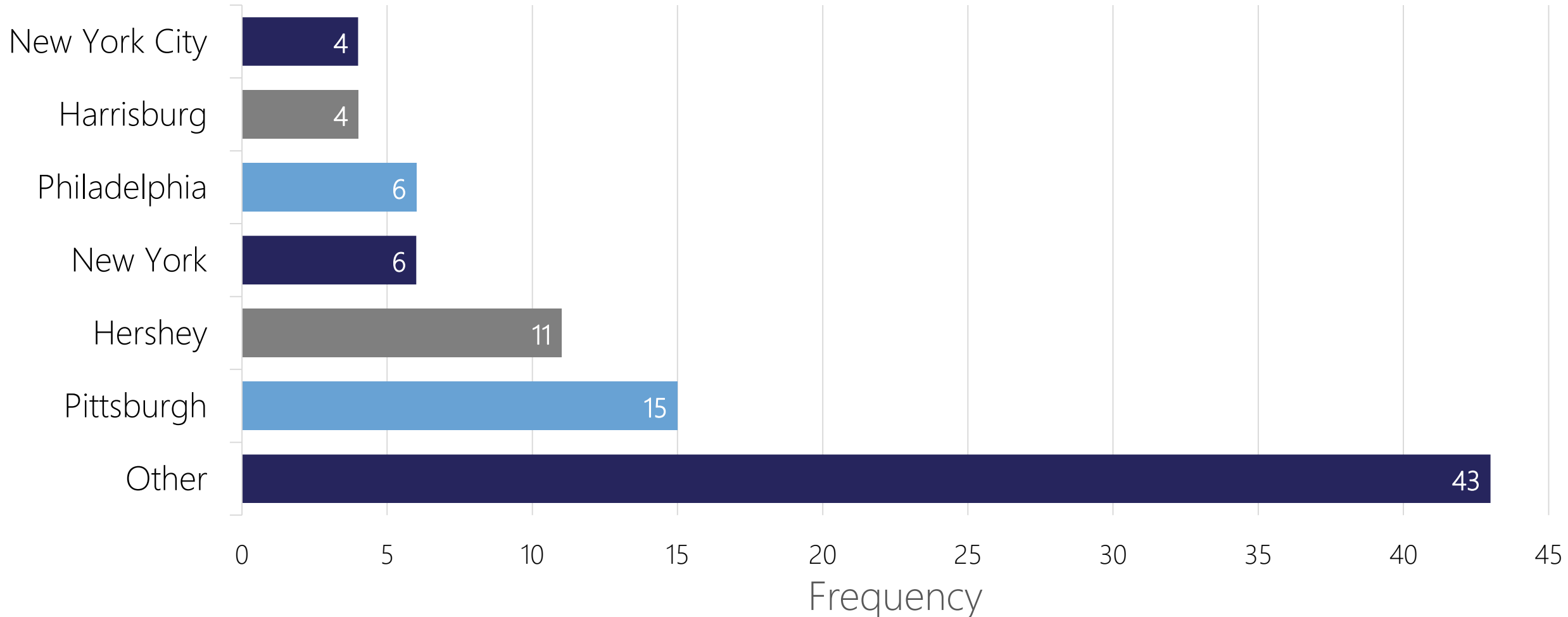
What is your primary destination in this trip (other than Centre County, n=33)?



For those who indicated that their primary destination was NOT Centre County, Pittsburgh was the most common primary destination (n=7).

OTHER DESTINATIONS CONSIDERED

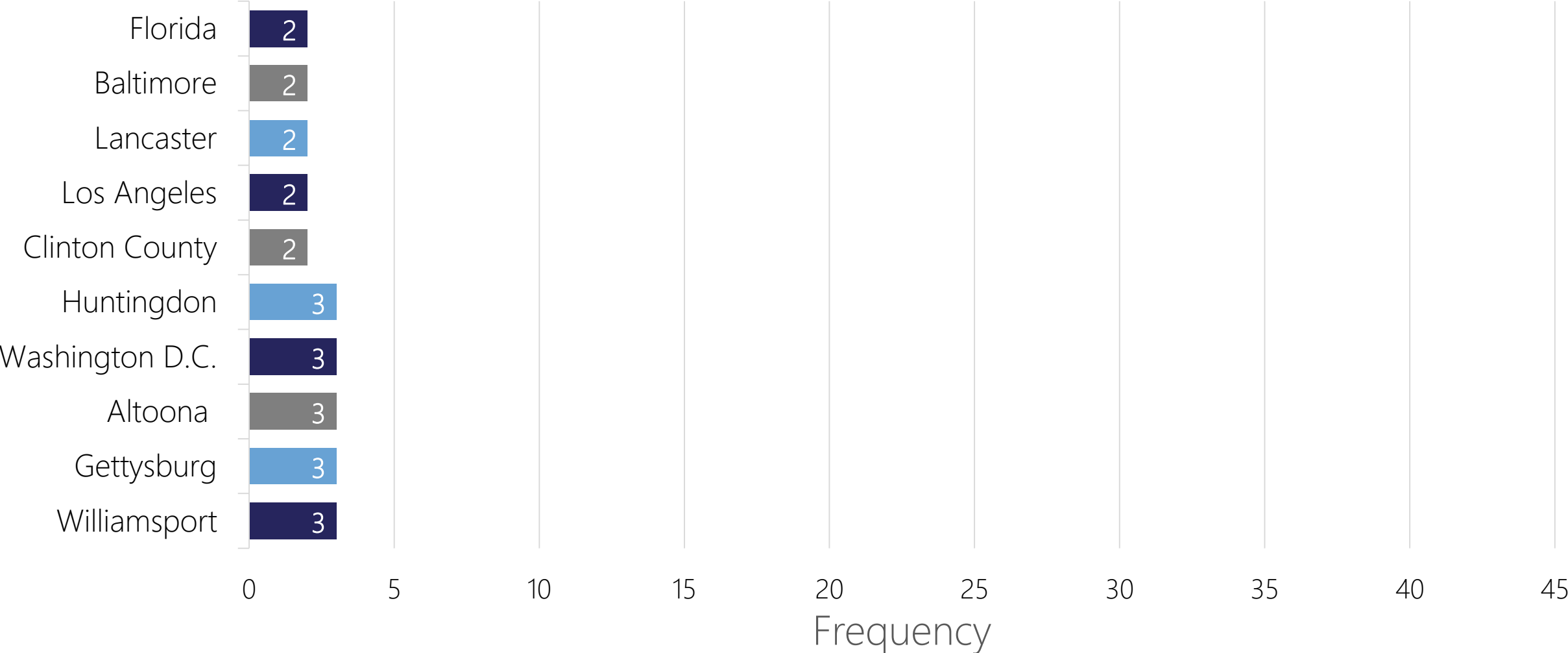
Did you consider traveling to a destination other than Centre County on this trip (n=79)?



Of the other destinations considered, Pittsburgh was the most popular (n=15).

OTHER DESTINATIONS CONSIDERED

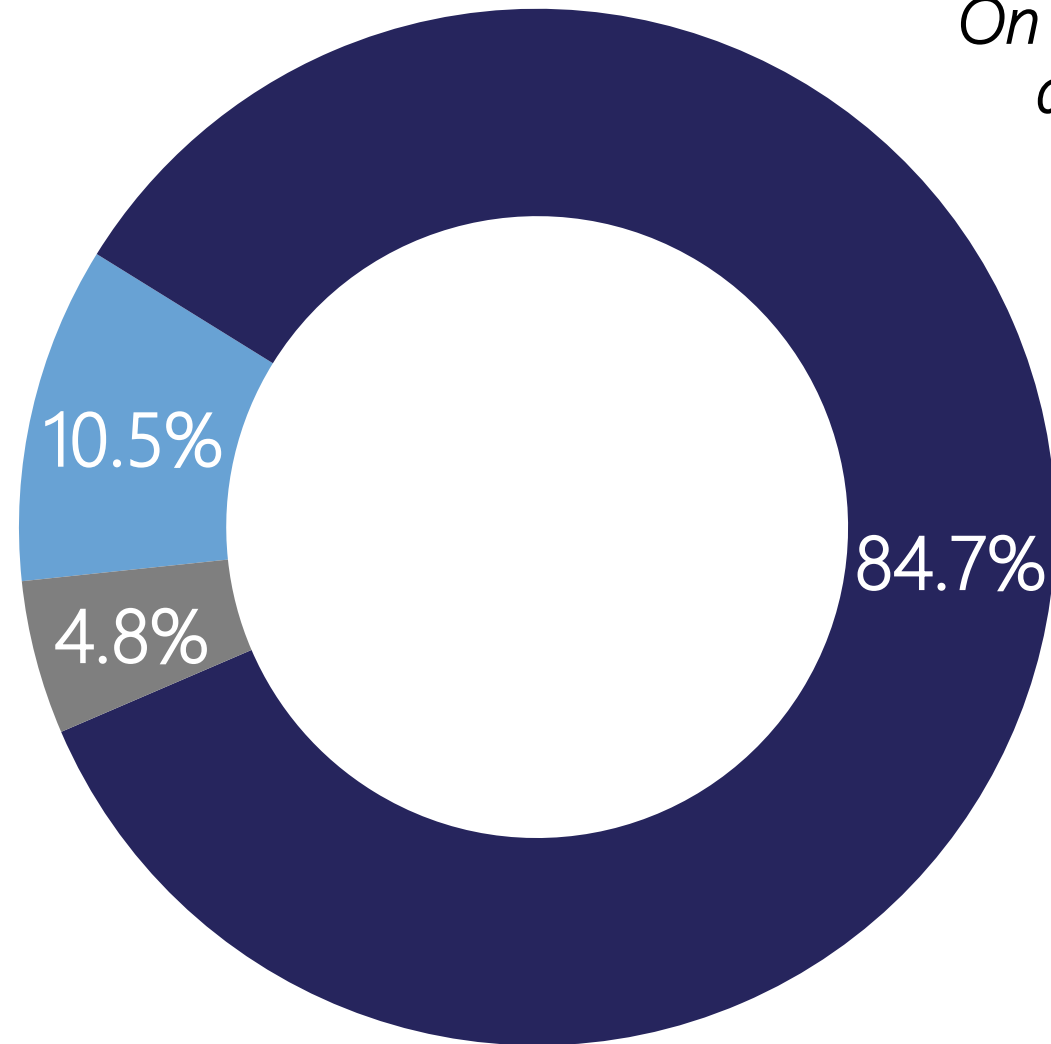
Did you consider traveling to a destination other than Centre County on this trip (n=79)?



**VISITATION TO
OTHER AREAS OF
CENTRE COUNTY**

PLANS TO VISIT OTHER AREAS OF CENTRE COUNTY

On this trip, do you plan to visit any other areas of Centre County besides this one (n=1195)?



■ Yes, n=126

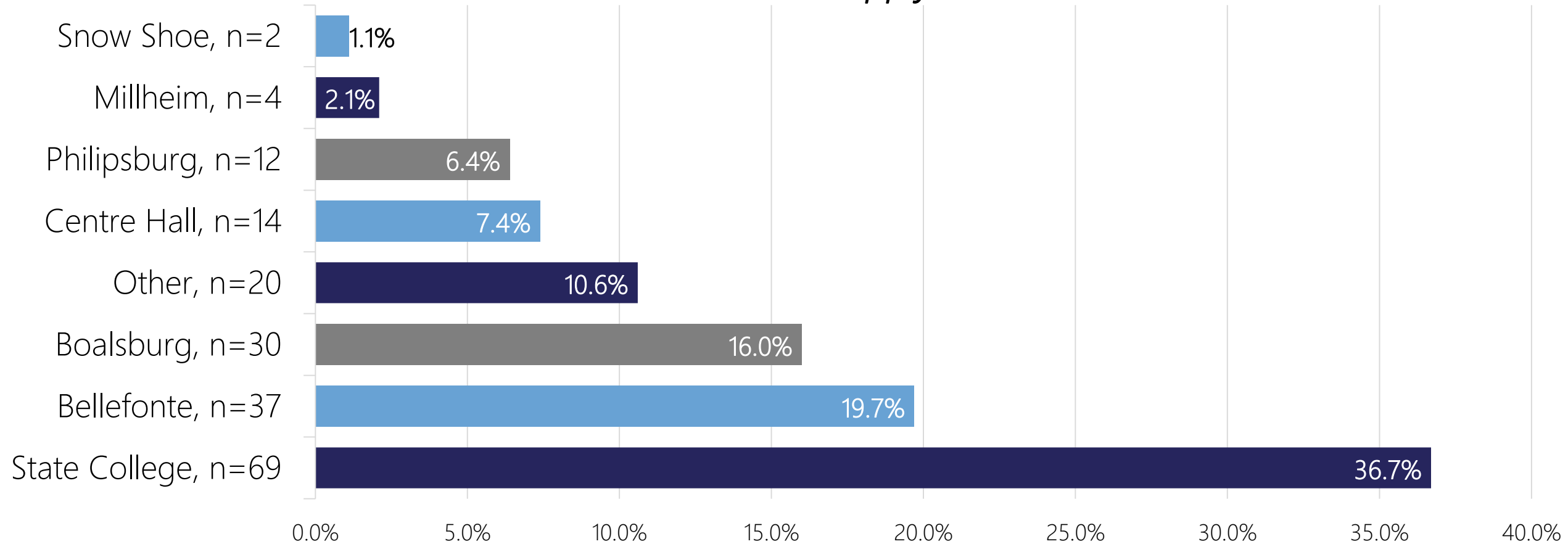
■ No, n=1012

■ Not Sure / Prefer Not To Answer, n=57

A majority (84.7%) of visitors indicated that they did not plan to visit any other areas of Centre County besides the one where they were intercepted.

PLANS TO VISIT OTHER AREAS OF CENTRE COUNTY*

*What other areas of Centre County do you plan to visit on this trip?
Please mark ALL that apply (n=188)?*

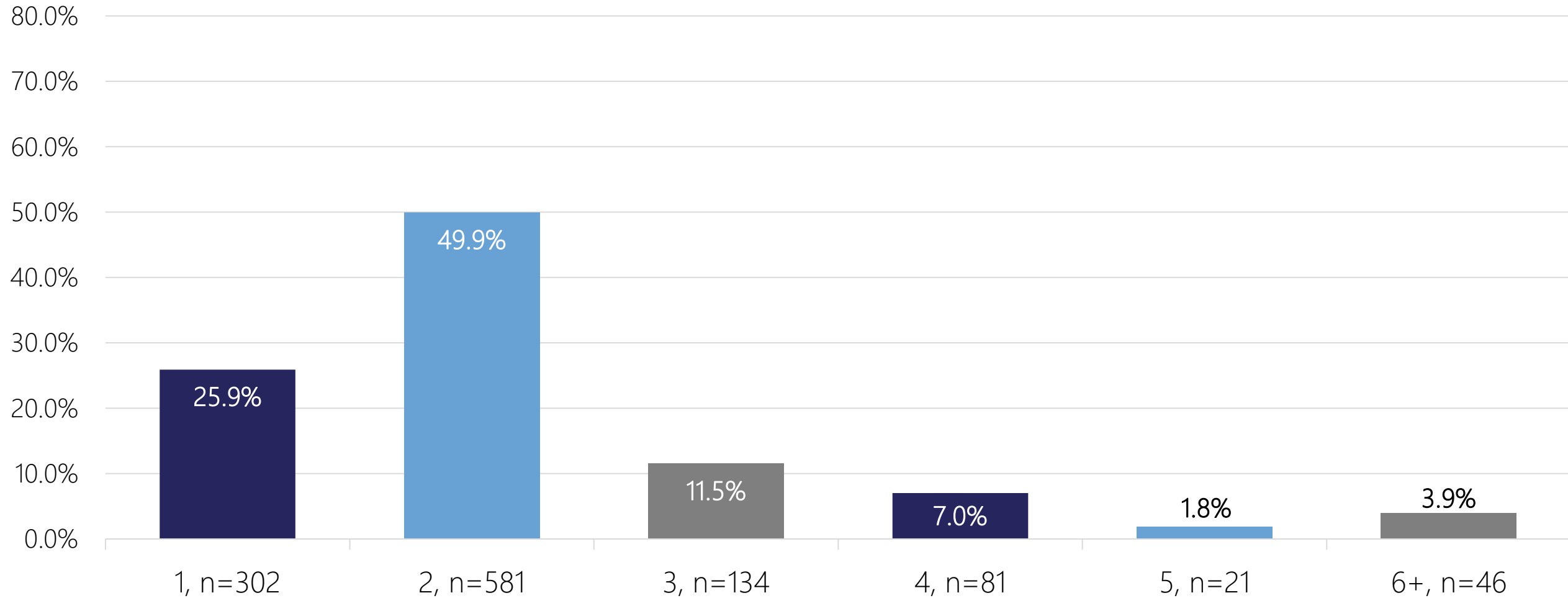


Those who indicated they planned to visit any other areas of Centre County were most likely to plan to visit State College (36.7%), Bellefonte (19.7%), or Boalsburg (16.0%).

TRAVEL PARTY COMPOSITION

TRAVEL PARTY COMPOSITION – NUMBER OF ADULTS

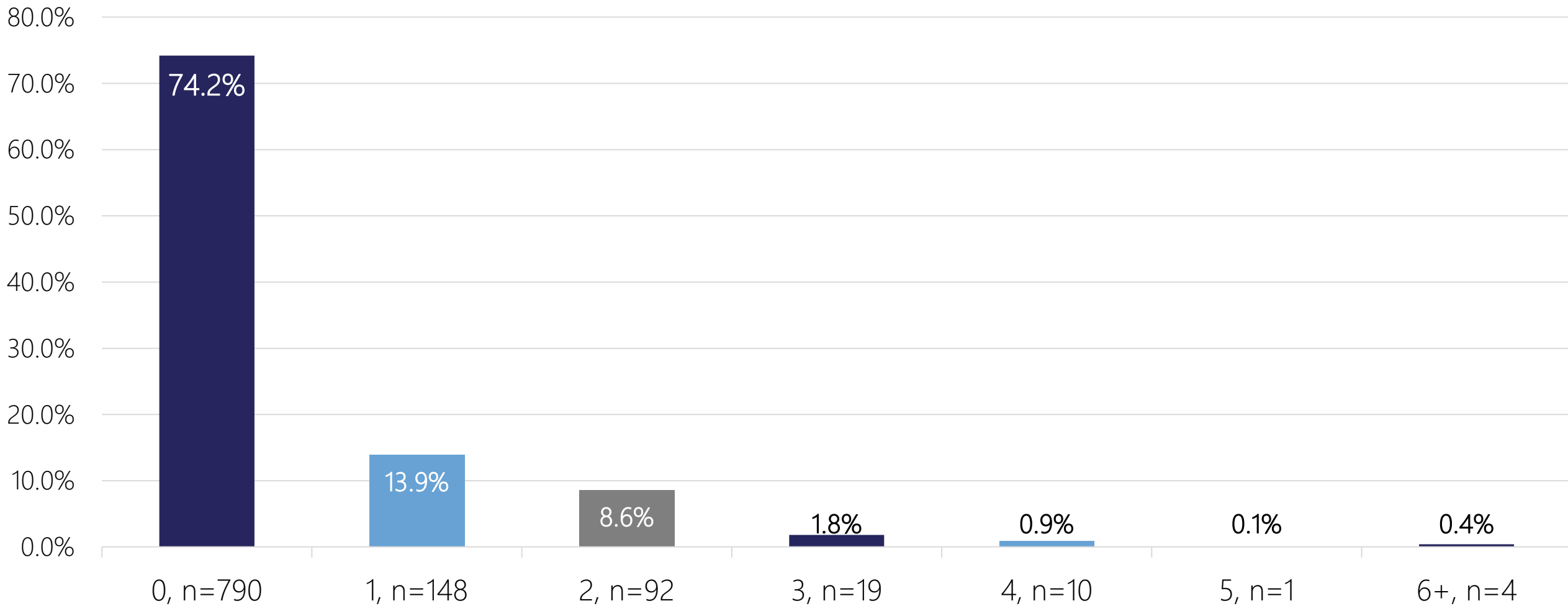
How many adults, including yourself, are you traveling with (n=1165)?



Half (49.9%) of visitors came to Centre County with another adult.

TRAVEL PARTY COMPOSITION – NUMBER OF CHILDREN

How many children under 18 are you traveling with (n=1064)?

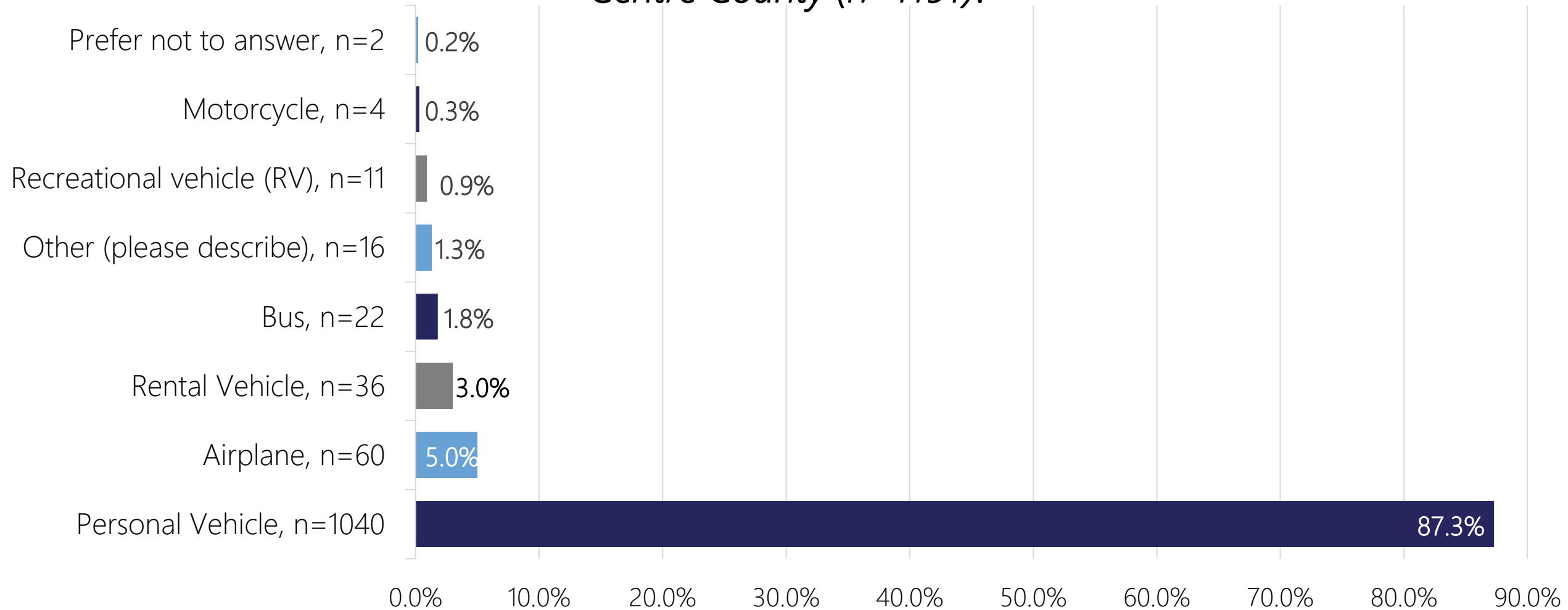


Nearly three-quarters (74.2%) of visitors did not travel with any children under 18.

MODE OF TRANSPORTATION

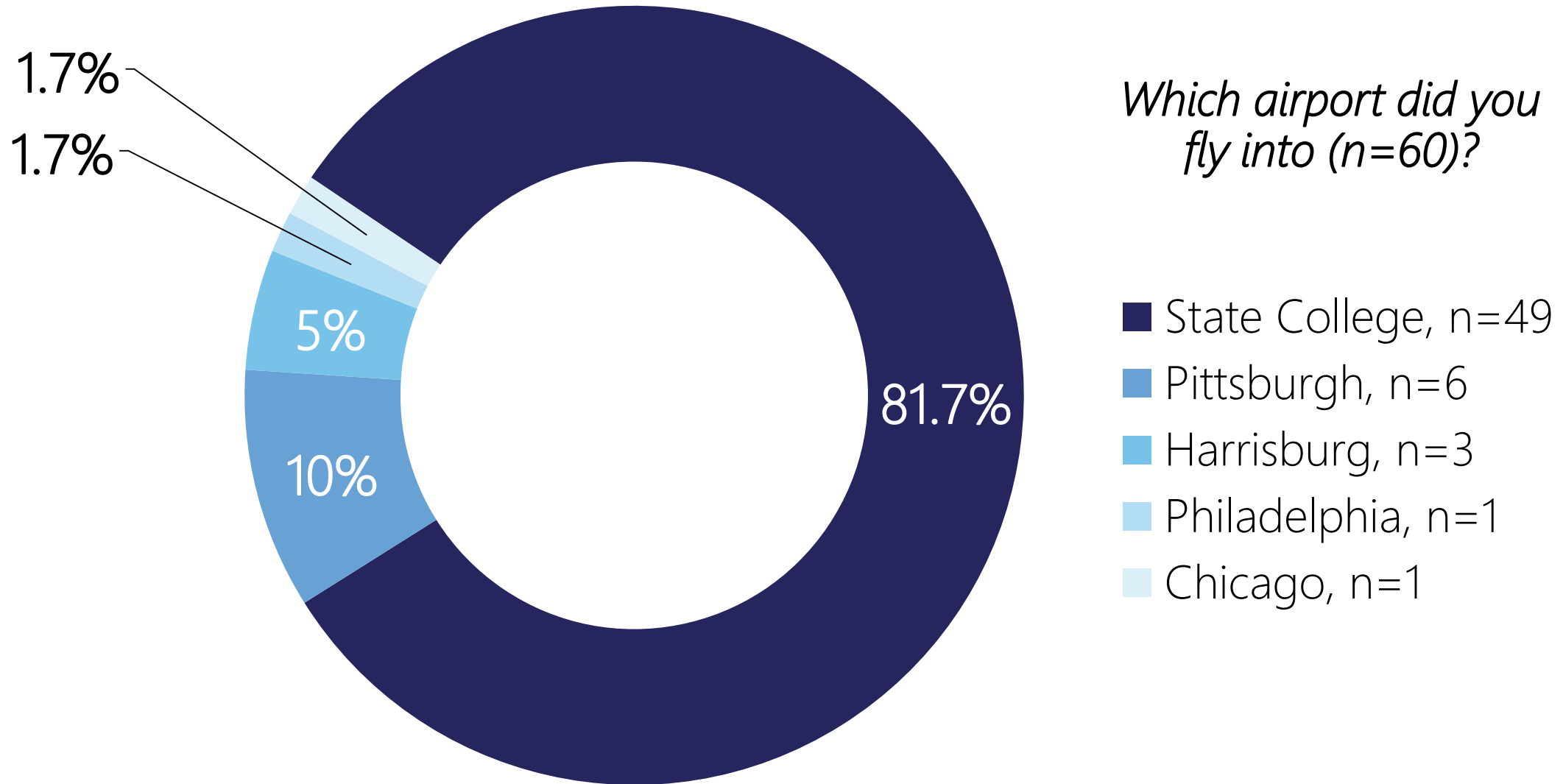
EN ROUTE TRANSPORTATION

On this trip, what was your primary mode of transportation when you traveled into Centre County (n=1191)?



The primary mode of transportation for 87.3% of visitors was their own personal vehicle.

AIRPORT FLOWN INTO

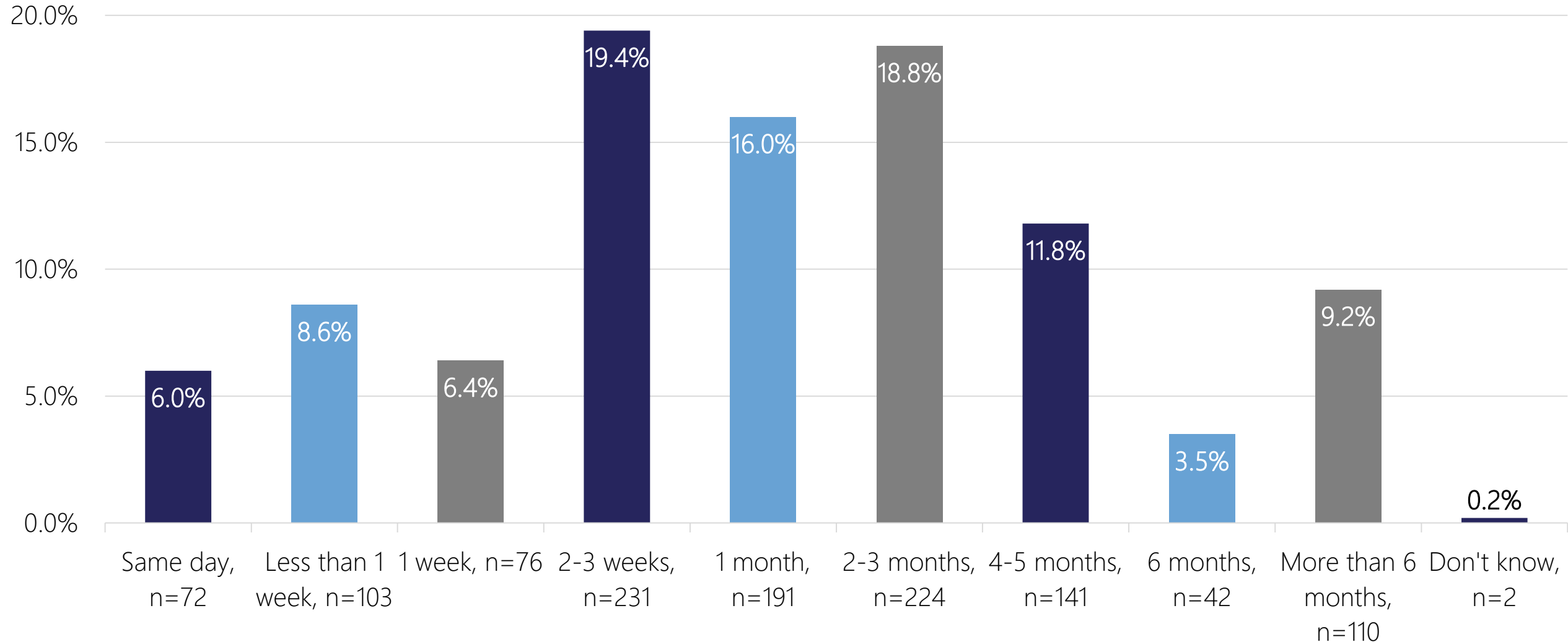


For those who indicated that an airplane was their primary mode of transportation, 81.7% of visitors flew into the University Park Airport (SCE).

TRAVEL PLANNING

TRAVEL PLANNING

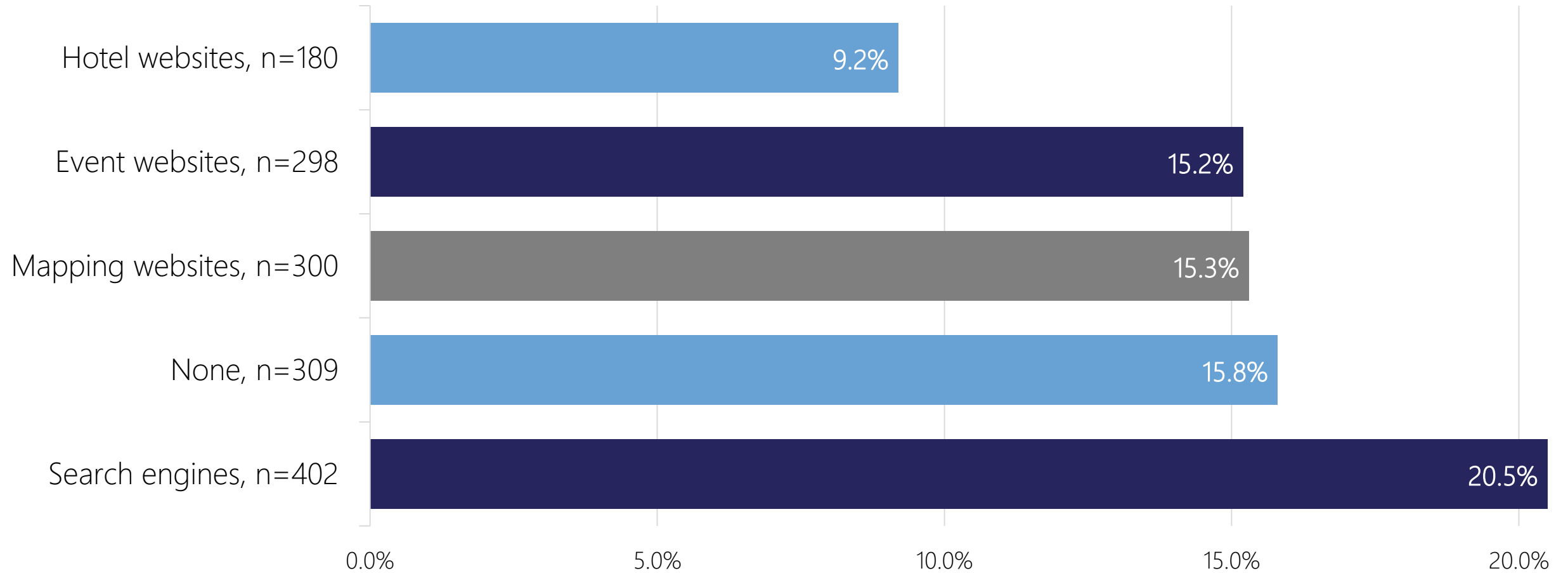
How far in advance did you plan this trip (n=1192)?



The length of time between planning a trip and visiting Centre County varied greatly.

ONLINE INFORMATION SOURCES

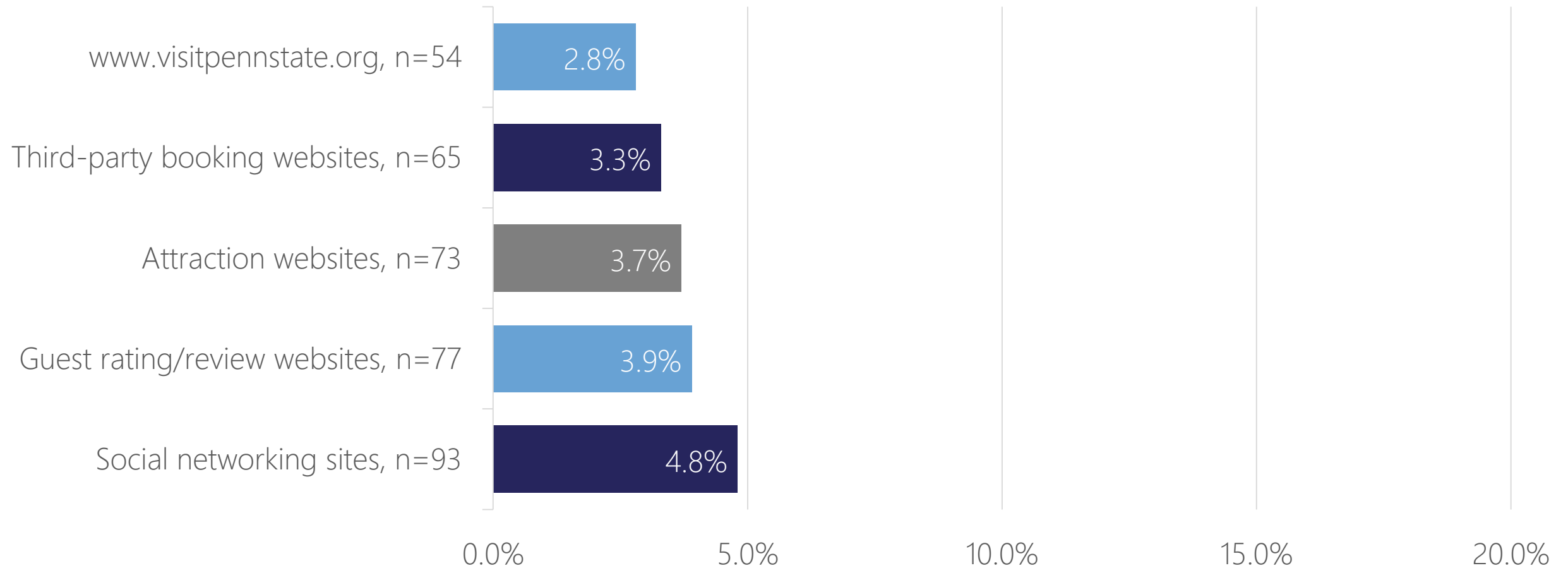
*What online information sources did you use to help with travel decisions for this visit?
Please select ALL that apply (n=1961)?*



One-in-five visitors (20.5%) used search engines to help with travel decisions for their visit to Centre County, while 15.8% did not use any online information sources.

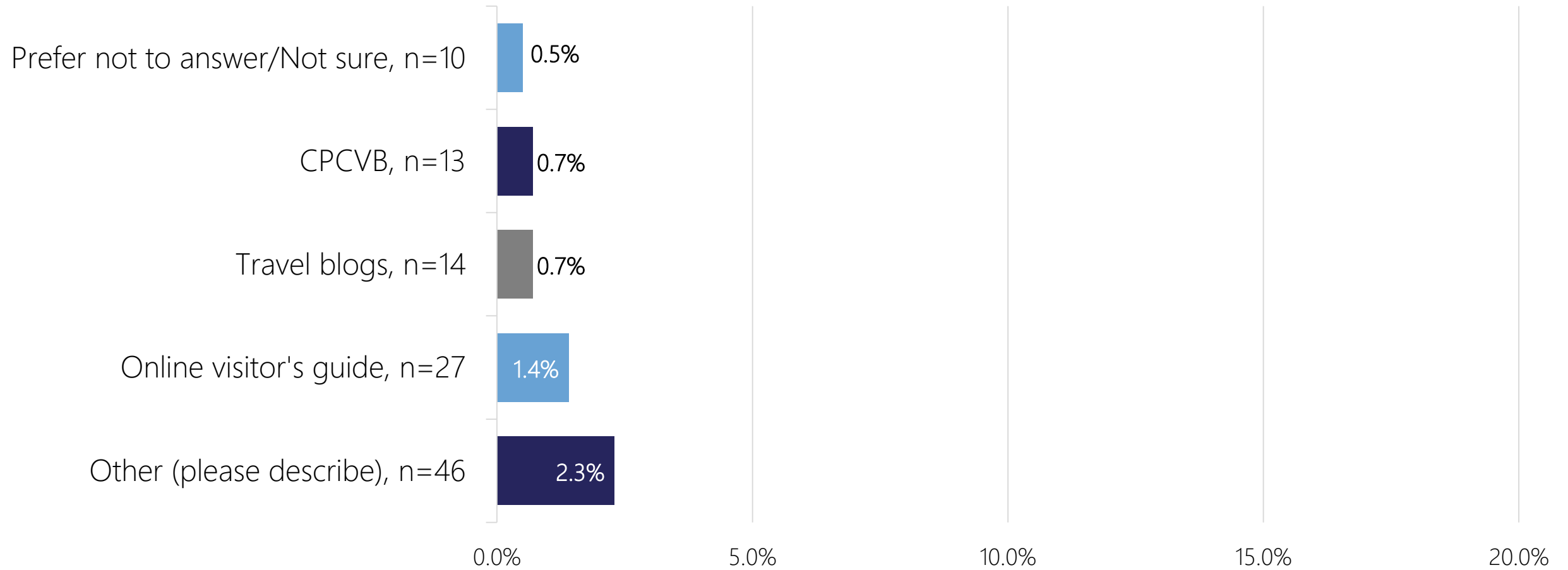
ONLINE INFORMATION SOURCES

*What online information sources did you use to help with travel decisions for this visit?
Please select ALL that apply (n=1961)?*



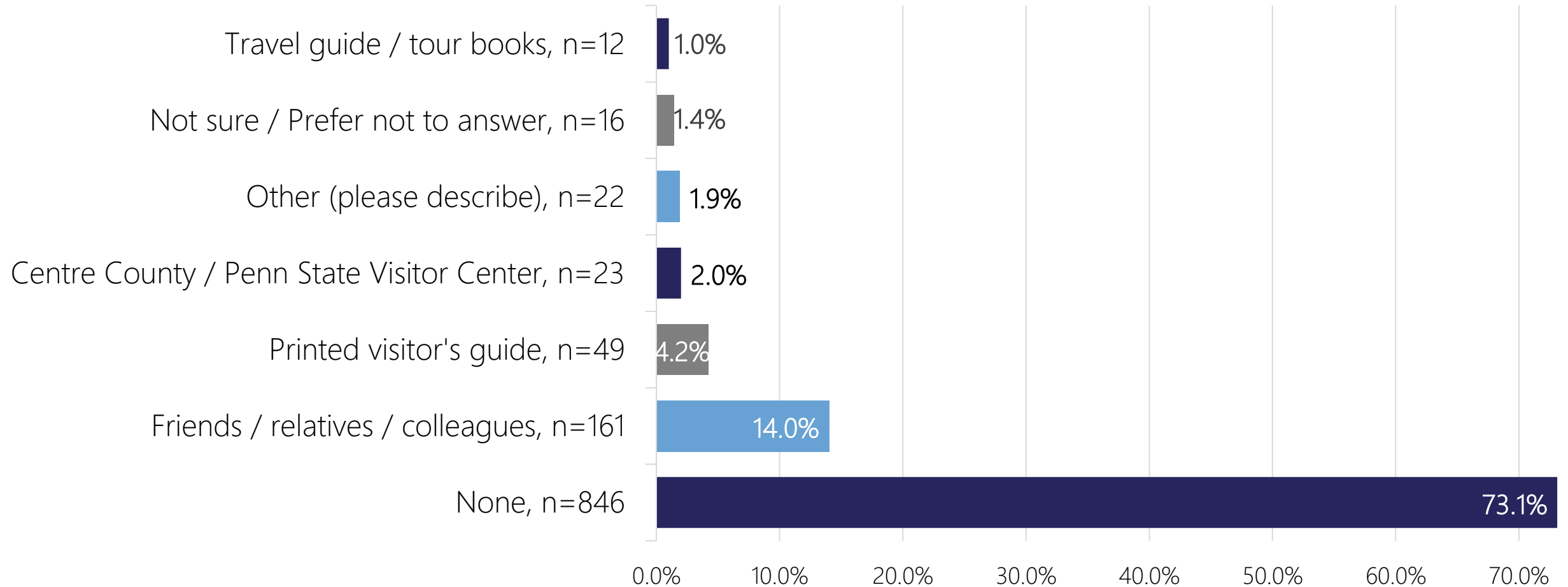
ONLINE INFORMATION SOURCES

*What online information sources did you use to help with travel decisions for this visit?
Please select ALL that apply (n=1961)?*



OFFLINE INFORMATION SOURCES

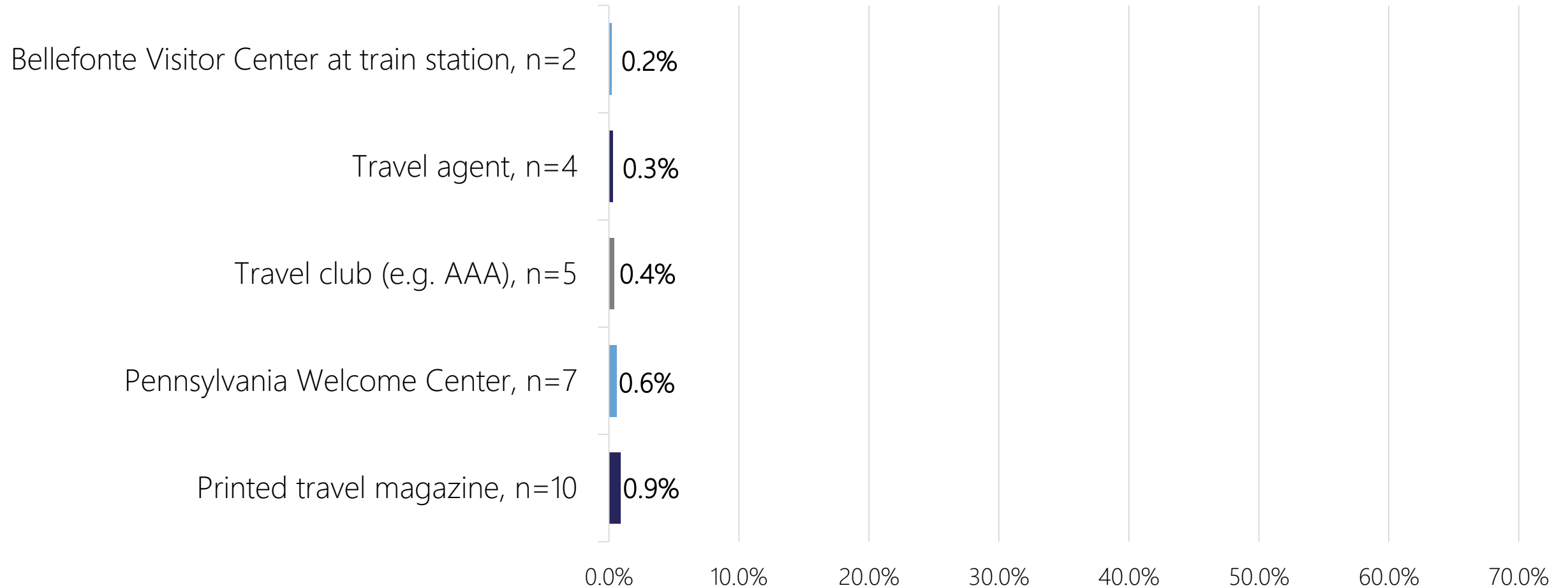
*What offline information sources did you use to help with travel decisions for this visit?
Please select ALL that apply (n=1157)?*



Approximately three-quarters (73.1%) of visitors did not use an offline information source to help with their travel decisions.

OFFLINE INFORMATION SOURCES

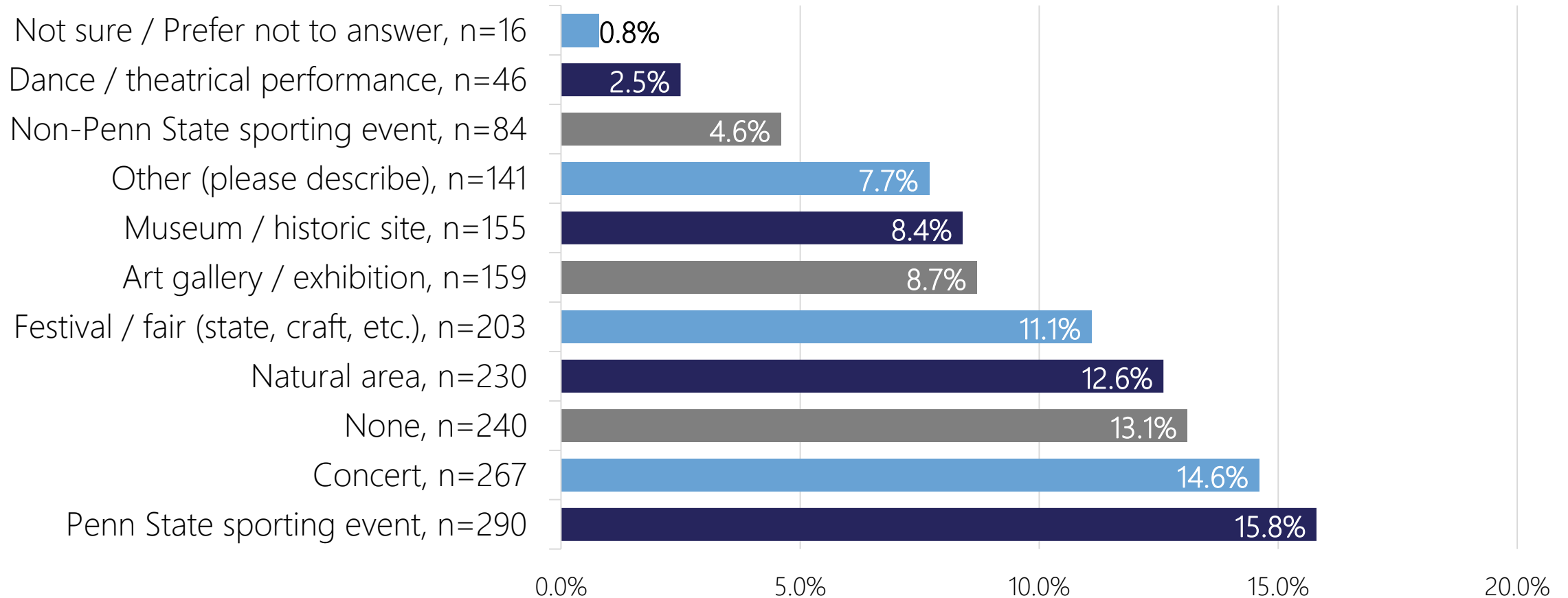
*What offline information sources did you use to help with travel decisions for this visit?
Please select ALL that apply (n=1157)?*



**PARTICIPATION
IN EVENTS,
ATTRACTIONS, &
ACTIVITIES**

EVENT AND ATTRACTION PARTICIPATION

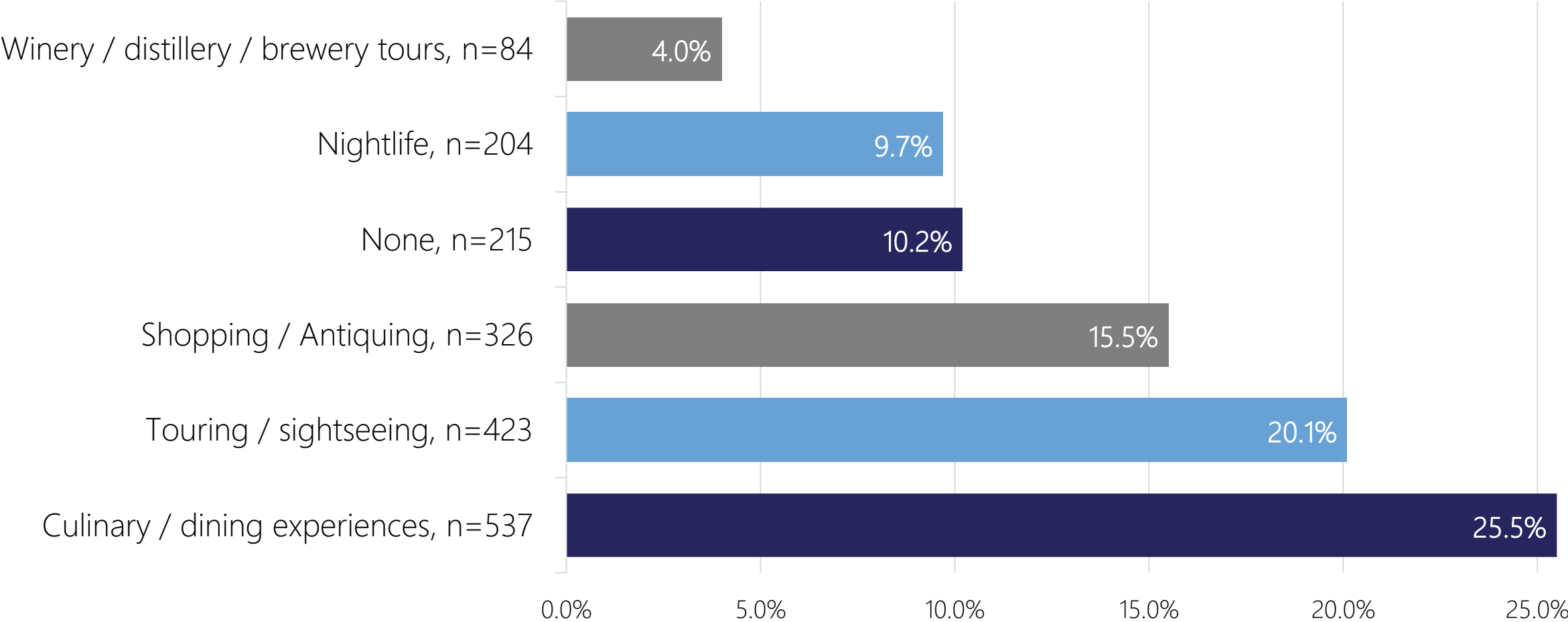
Please select ALL of the events or attractions that you have already or plan to visit in during your stay in Centre County (n=1831)?



The 2 most common events or attractions visitors participated in were Penn State sporting events (15.8%) and concerts (14.6%).

ACTIVITY PARTICIPATION

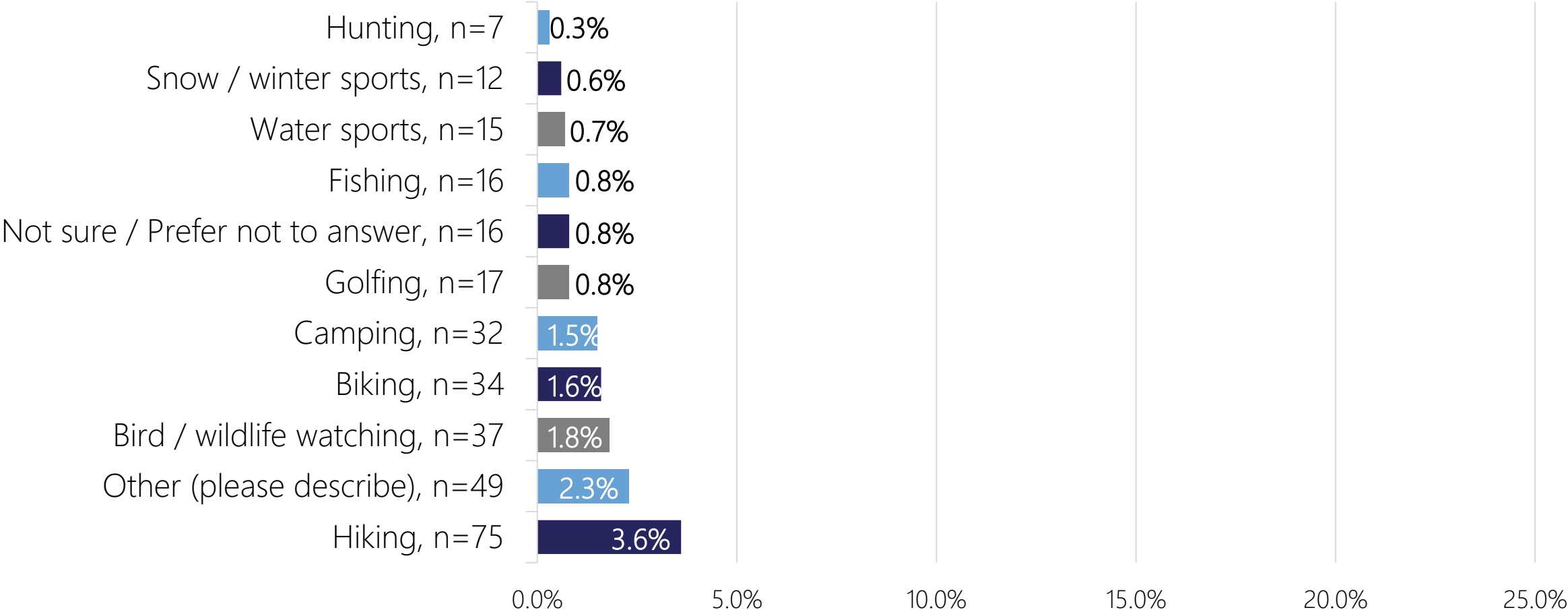
Please select ALL of the activities that you have already or plan to participate in during your stay in Centre County (n=2099)?



The 3 most common activities visitors participated in were culinary experiences (25.5%), sightseeing (20.1%), and shopping (15.5%).

ACTIVITY PARTICIPATION

Please select ALL of the activities that you have already or plan to participate in during your stay in Centre County (n=2099)?



In total, outdoor activities accounted for 11.7% of activities participated in.

THINGS ENJOYED MOST



Please describe the 3 things that you enjoyed most about your current visit to Centre County (n=953).

The 4 most common things that visitors enjoyed most about their visit to Centre County were Penn State's campus, family, concerts, and Penn State.

**SATISFACTION
WITH VISIT TO
CENTRE COUNTY**

SUMMARY OF SATISFACTION

On a scale of 1-5 (where 1= extremely dissatisfied, 5= extremely satisfied), please rate how satisfied you are with the following aspects of your current visit to Centre County?

Aspect	Mean
Feeling of safety	4.79
Attractiveness of natural areas	4.77
Quality of sporting events	4.76
Friendliness of people	4.69
Helpfulness of people	4.67
Quality of natural areas	4.67
Availability of outdoor activities & experiences	4.58
The location as a place for a day trip	4.54
The location as a place for a weekend getaway	4.52

Out of the 26 aspects rated by visitors, all nature-related aspects measured were rated within the top 7 aspects that visitors were most satisfied with.

SUMMARY OF SATISFACTION

On a scale of 1-5 (where 1= extremely dissatisfied, 5= extremely satisfied), please rate how satisfied you are with the following aspects of your current visit to Centre County?

Aspect	Mean
Quality of lodging	4.48
Quality of attractions	4.47
Variety of things to see and do	4.45
Quality of cultural events	4.44
Quality of performing arts	4.43
Availability of authentic & unique attractions and entertainment opportunities	4.42
Attractiveness of downtown areas	4.42
Availability of unique & vibrant neighborhoods/towns	4.41
Quality of restaurants	4.40

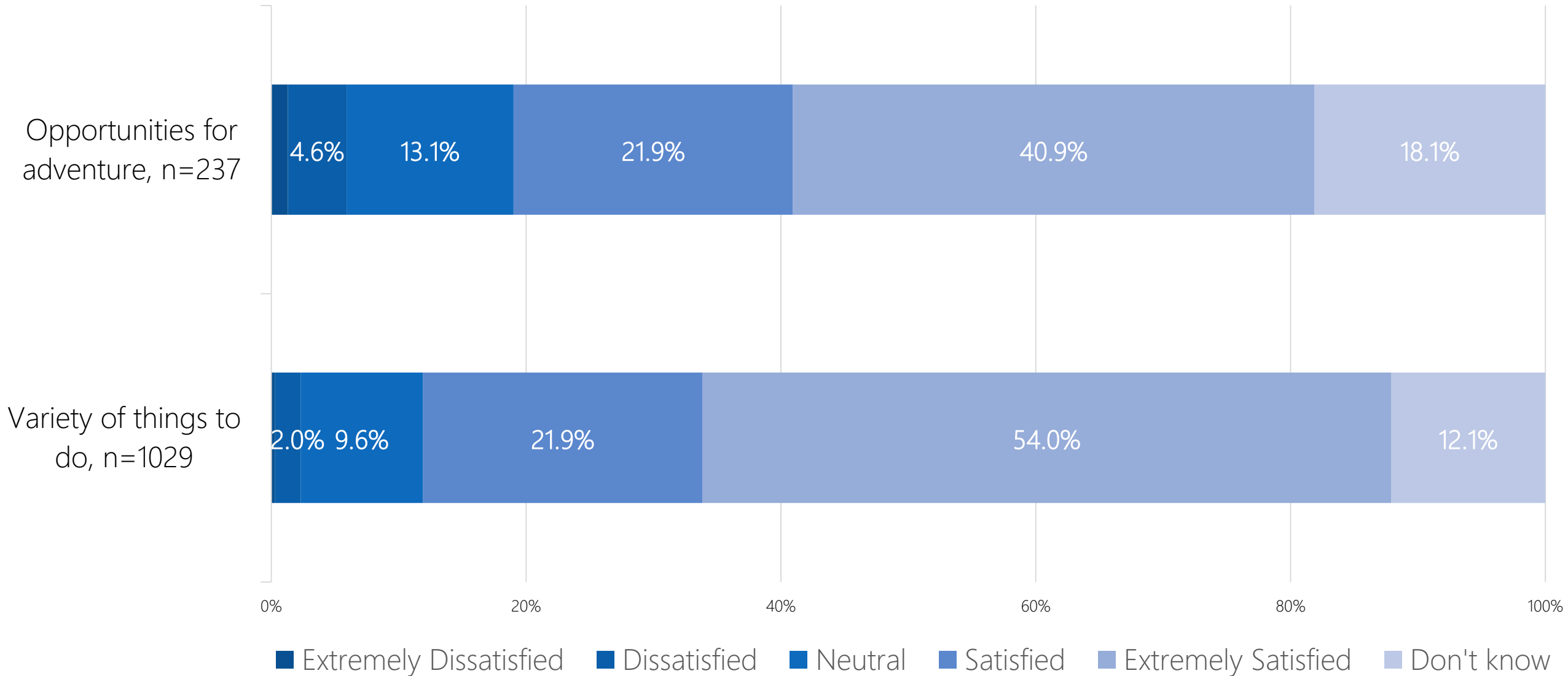
SUMMARY OF SATISFACTION

On a scale of 1-5 (where 1= extremely dissatisfied, 5= extremely satisfied), please rate how satisfied you are with the following aspects of your current visit to Centre County?

Aspect	Mean
The location as a destination for business meetings	4.39
Availability of cultural events	4.37
Availability of cultural & historical sites	4.36
Availability of unique dining opportunities	4.32
The location as a value for money spent	4.31
Opportunities for adventure	4.18
Availability of diverse & high quality shopping opportunities	4.09
The location as a place for a family vacation	4.00

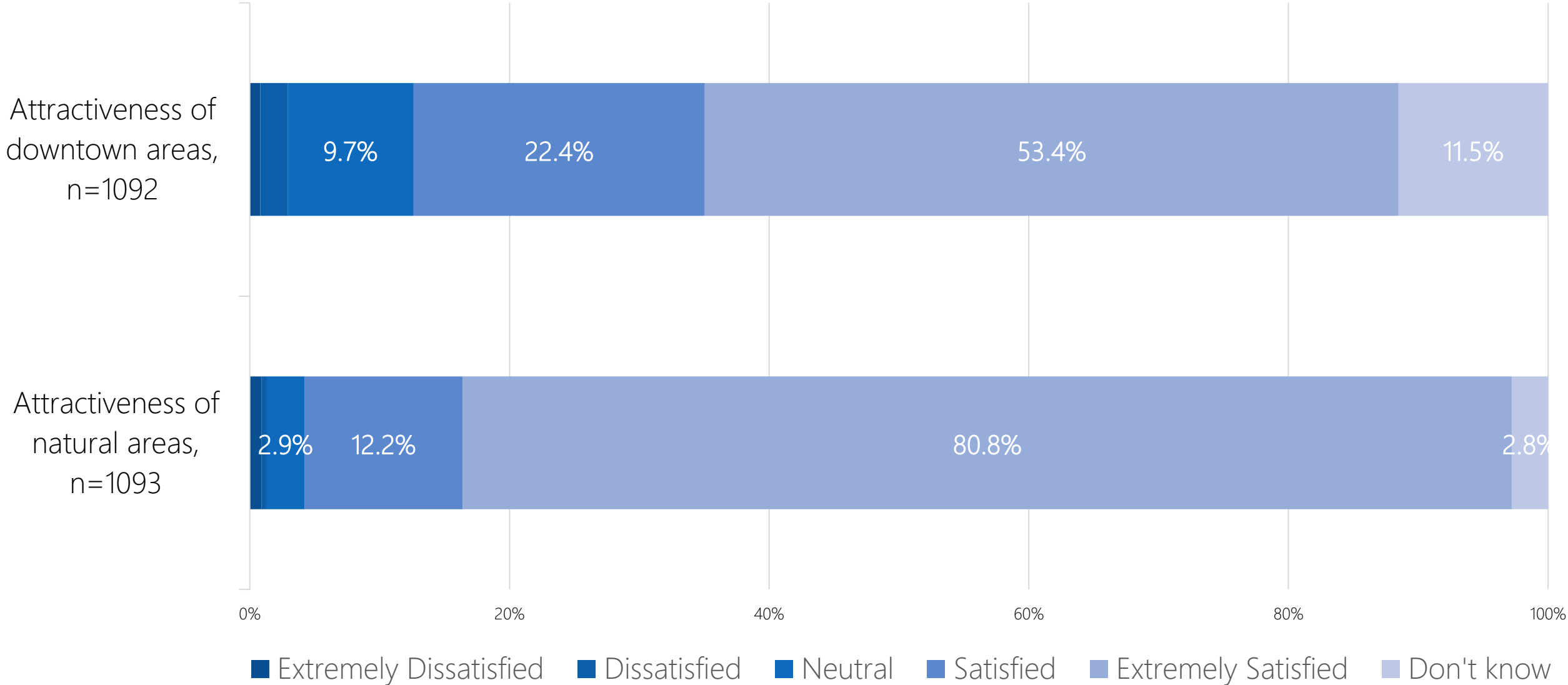
Overall, visitors on average rated every aspect of their current visit to Centre County as at least satisfactory.

SATISFACTION



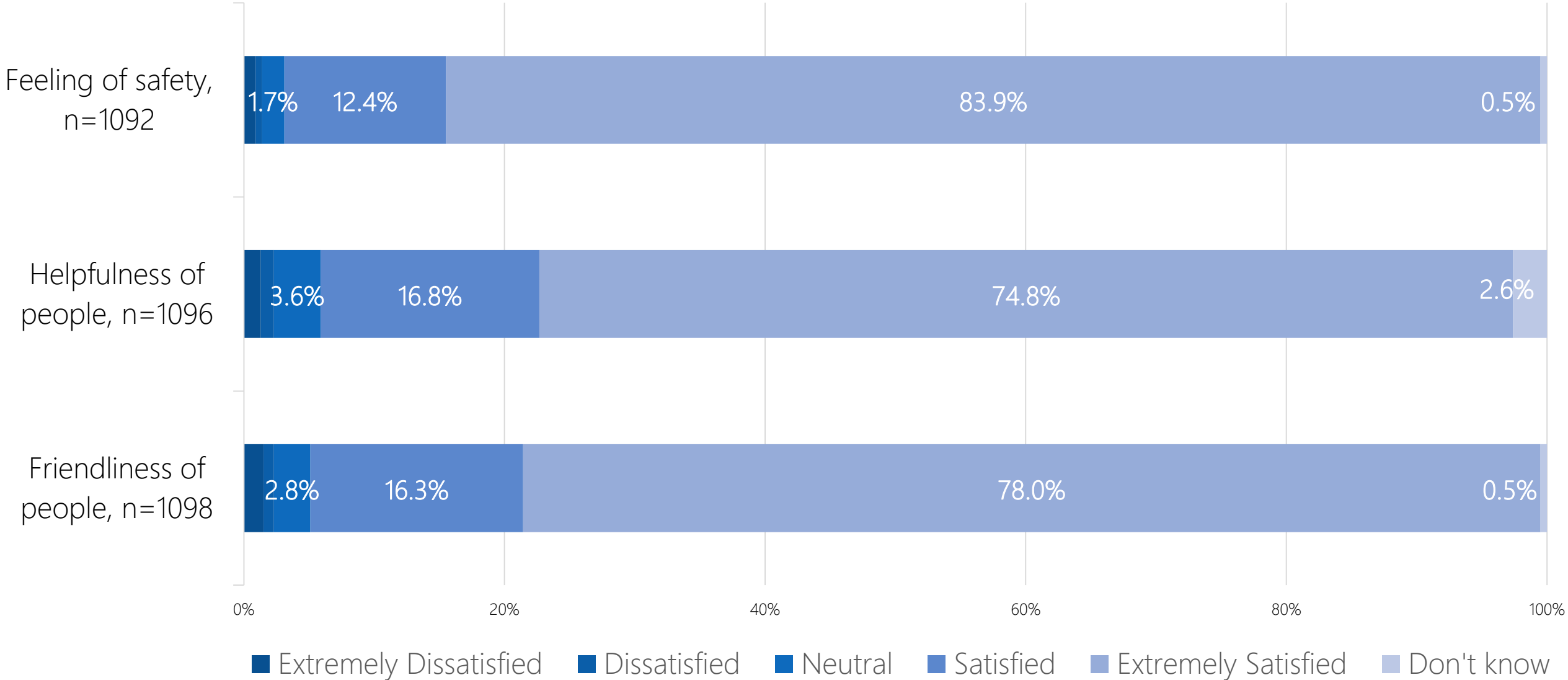
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SATISFACTION



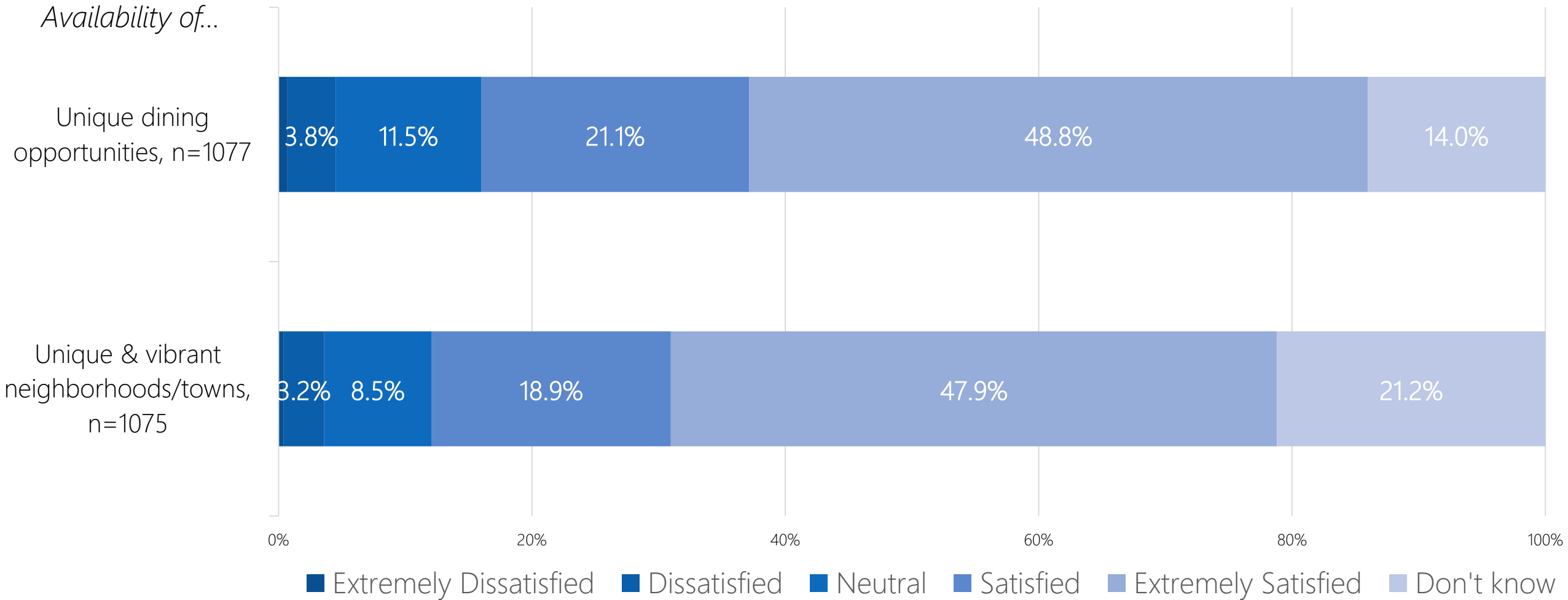
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SATISFACTION



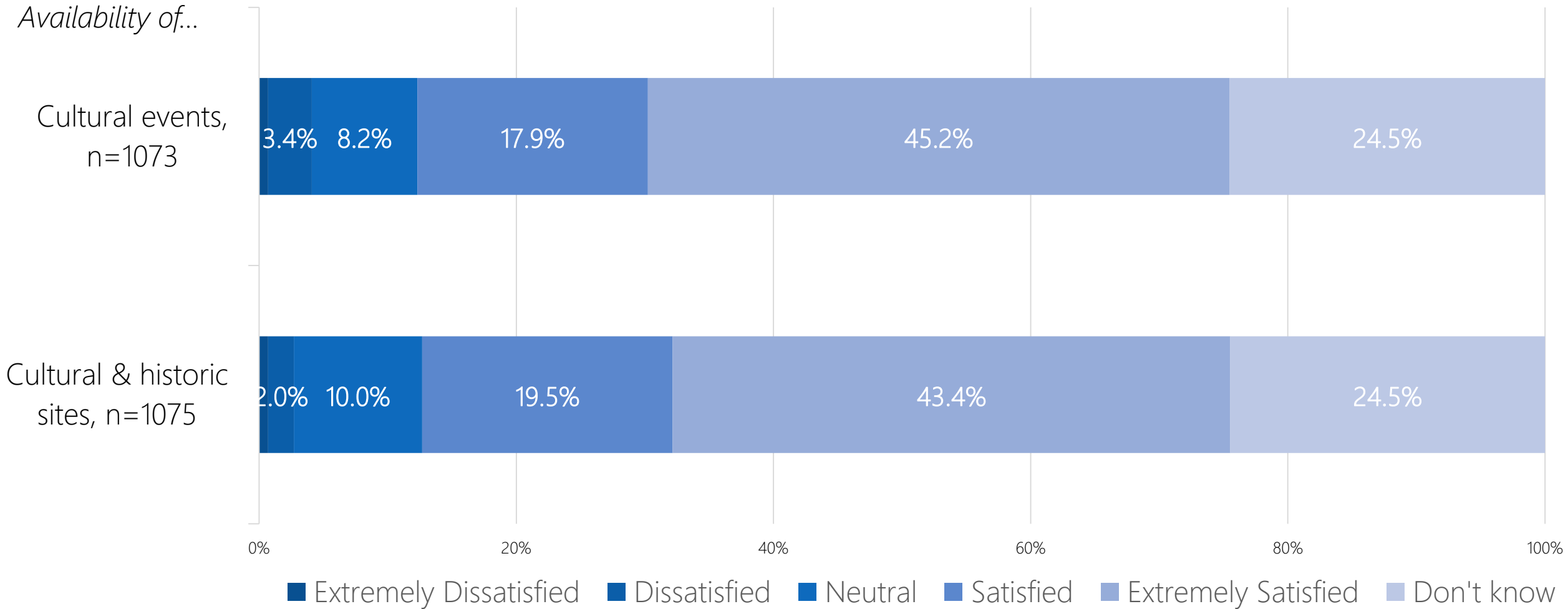
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SATISFACTION



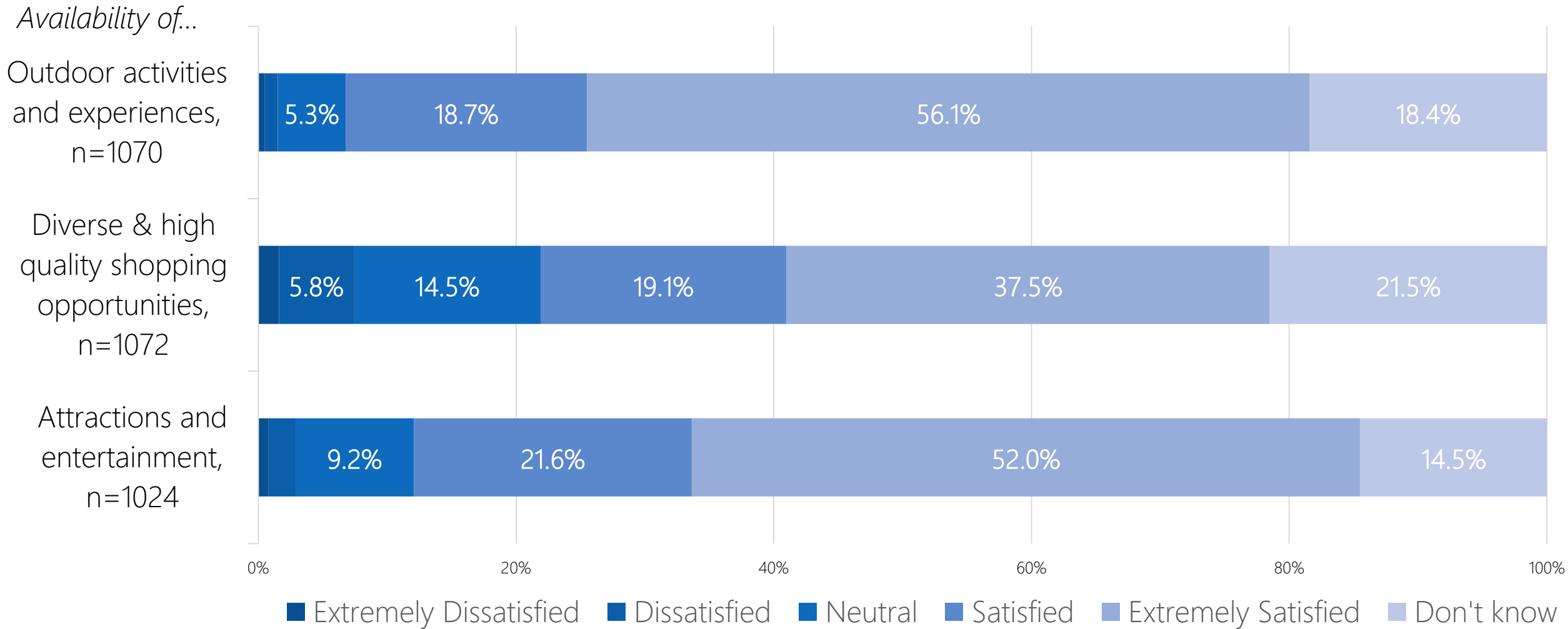
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SATISFACTION



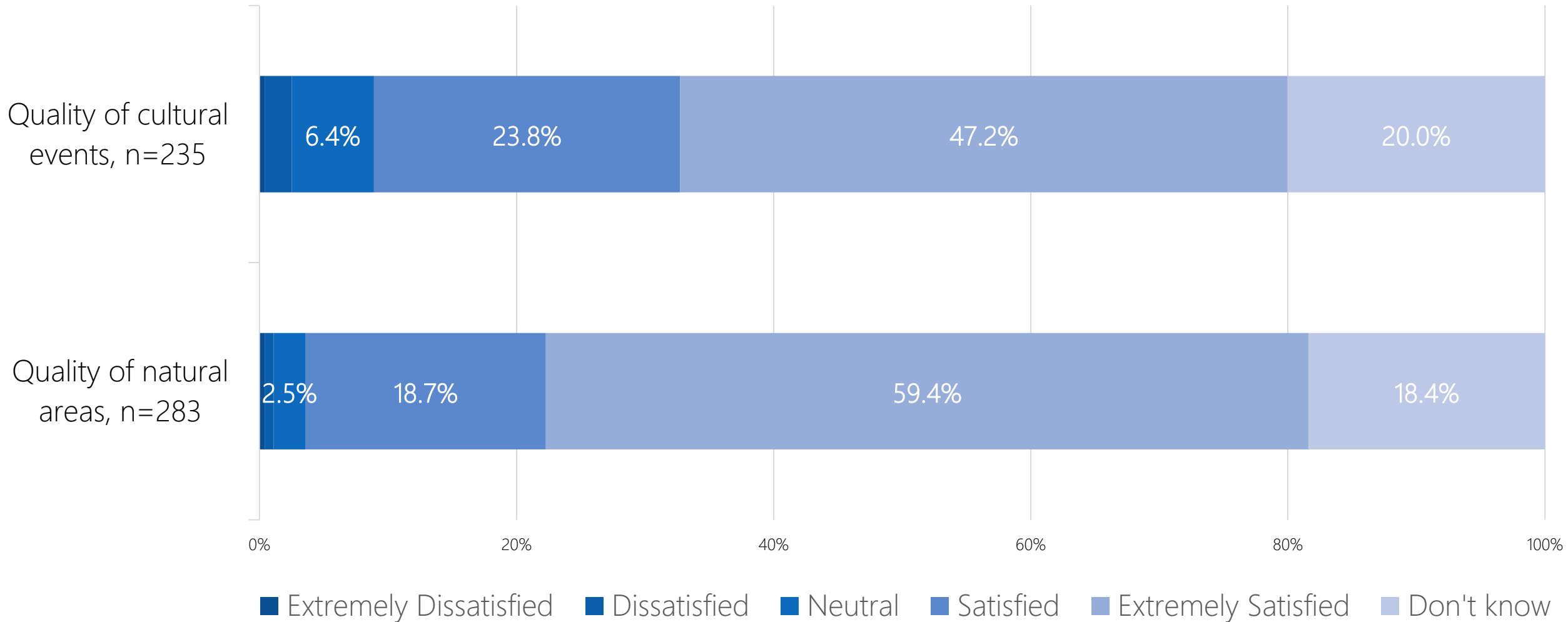
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SATISFACTION



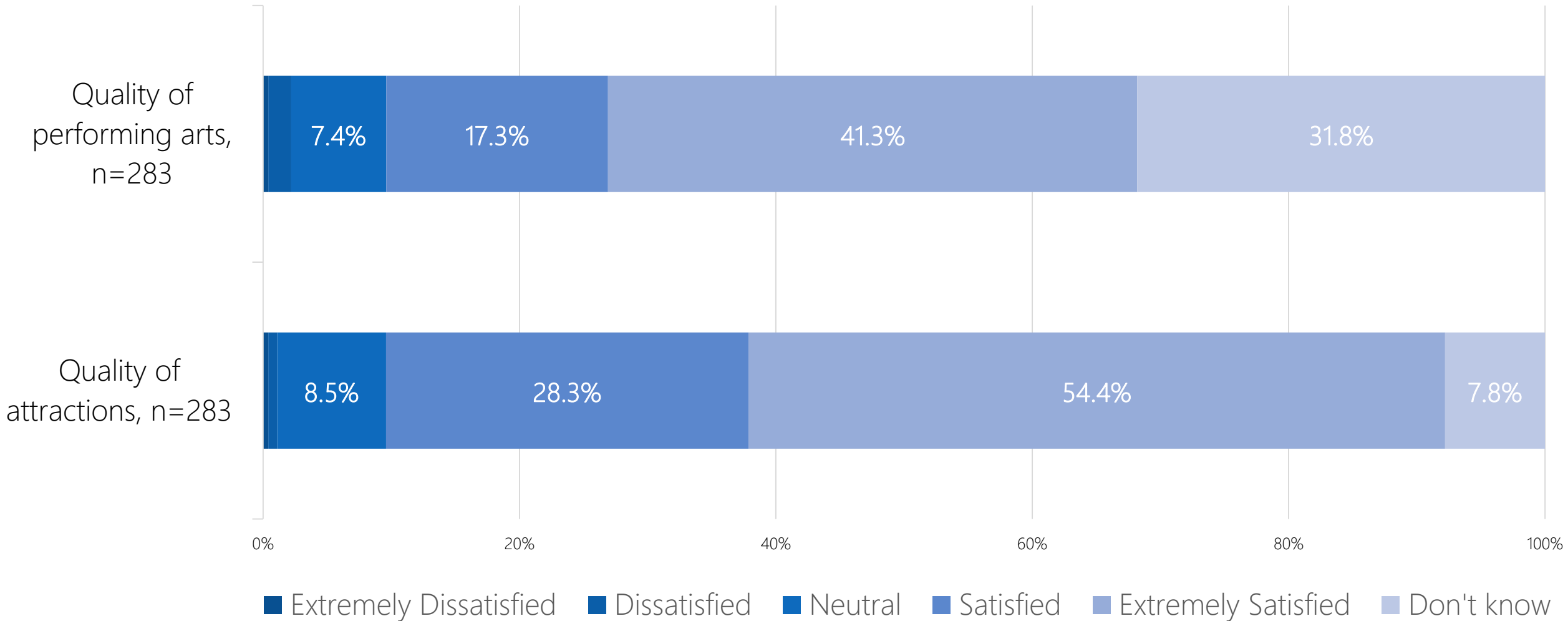
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SATISFACTION



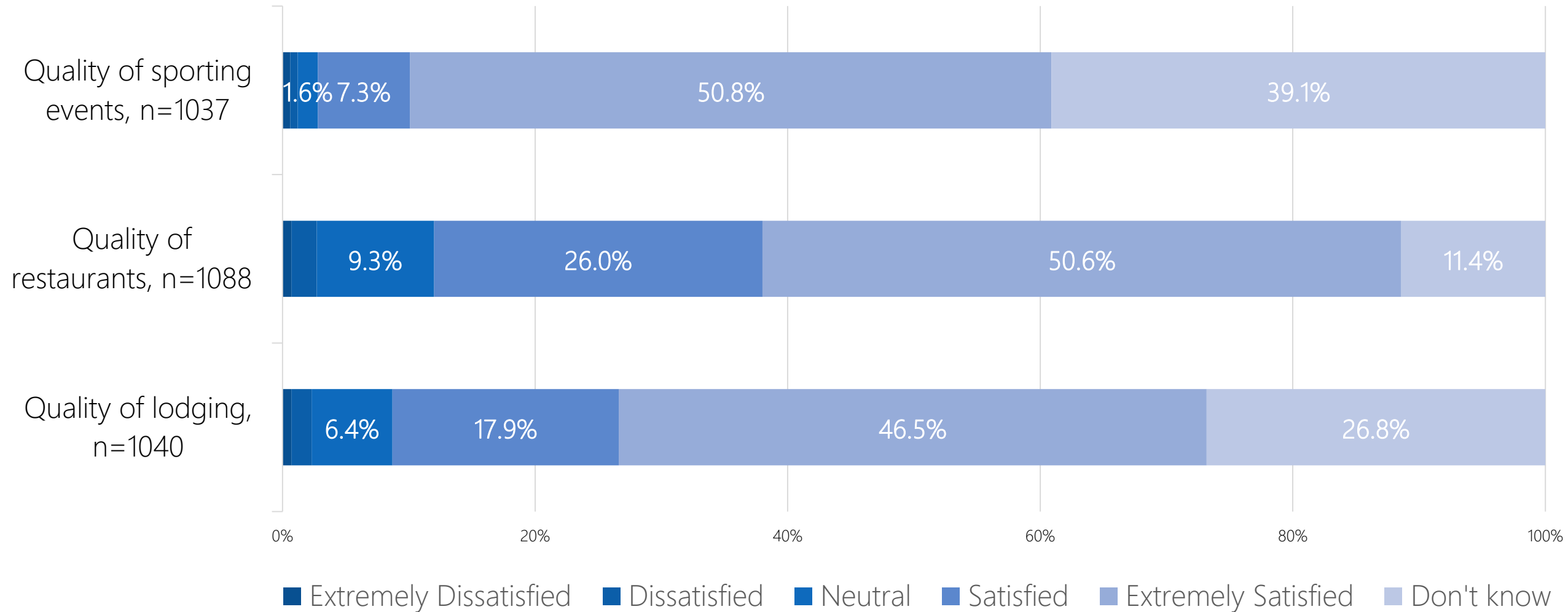
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SATISFACTION



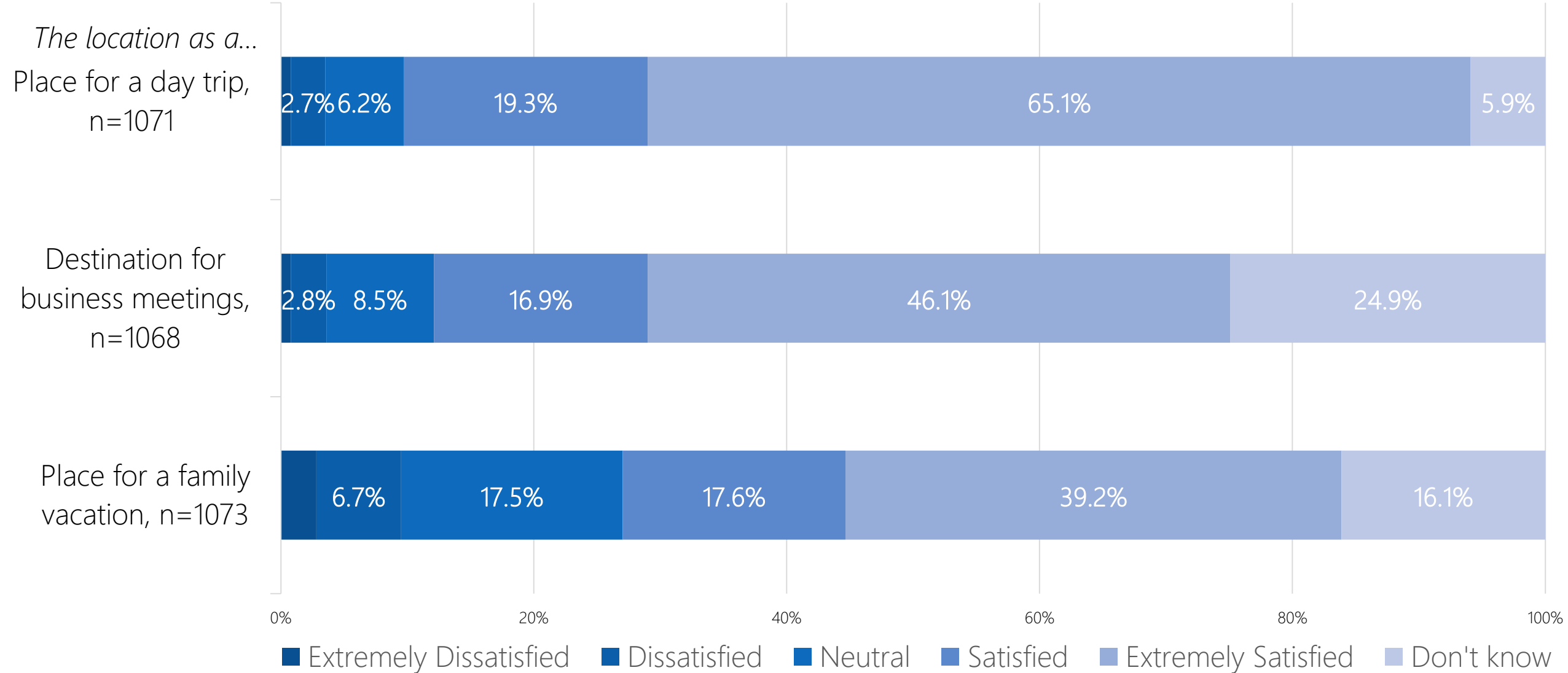
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SATISFACTION



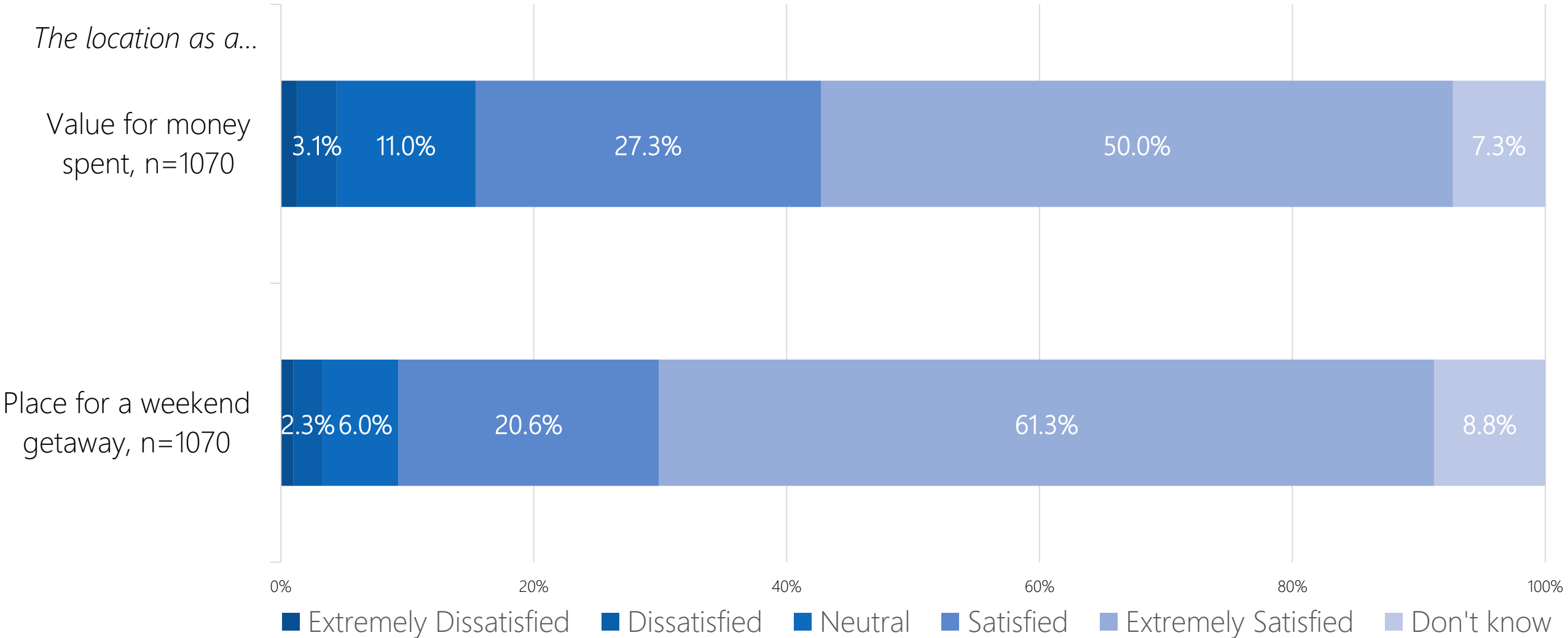
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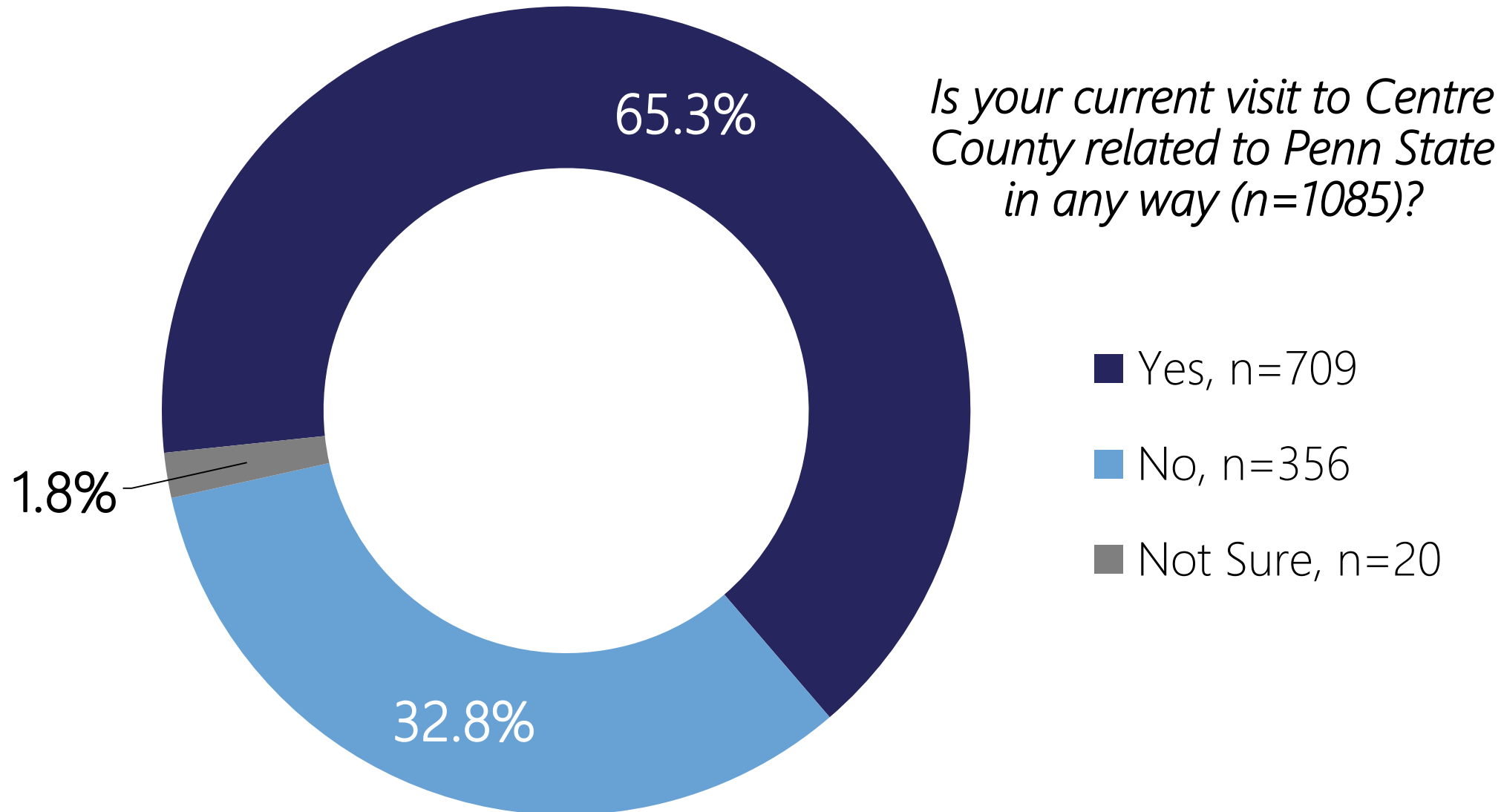
SATISFACTION



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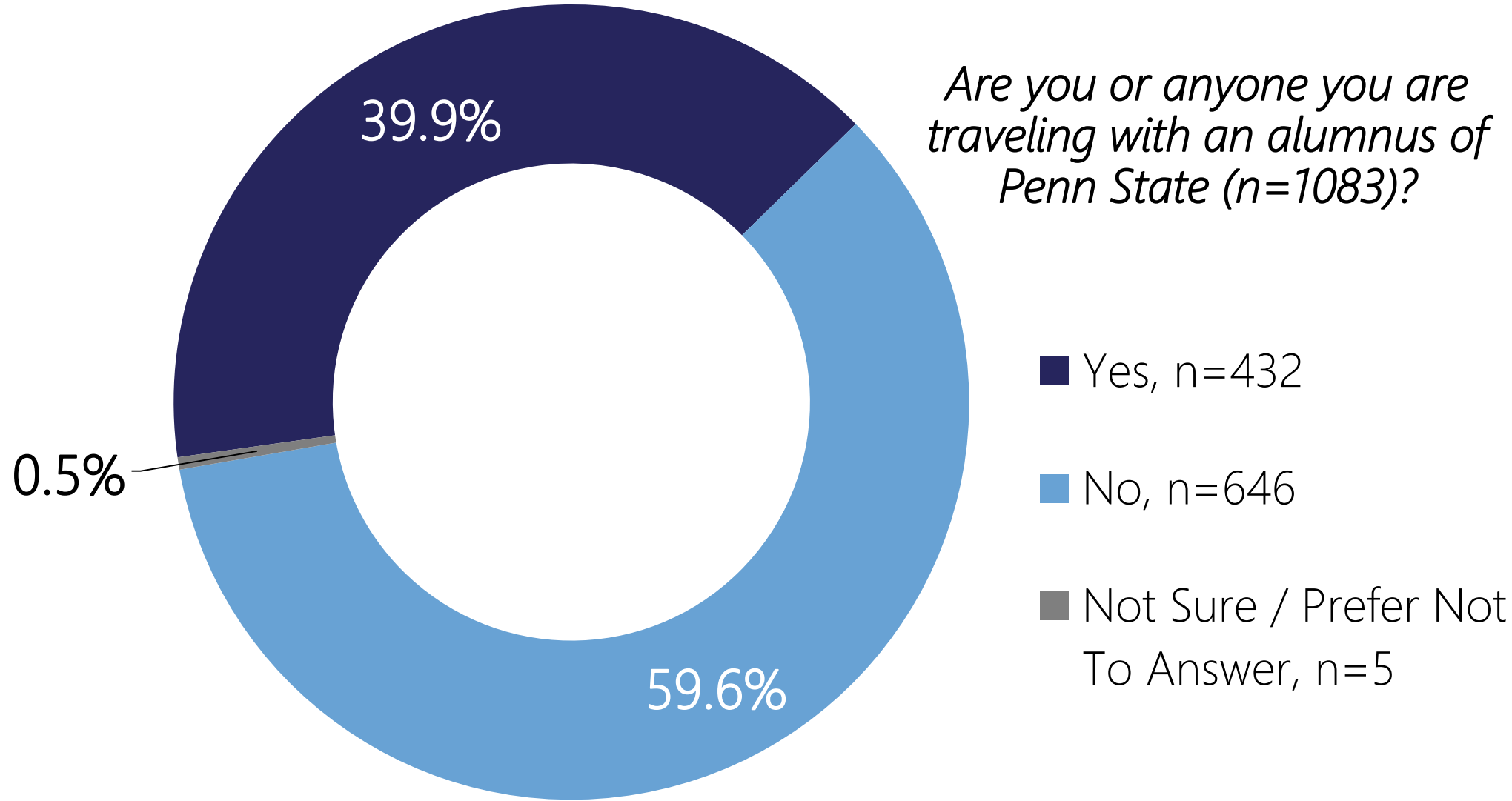
PENN STATE- RELATED TRAVEL

VISIT RELATED TO PENN STATE



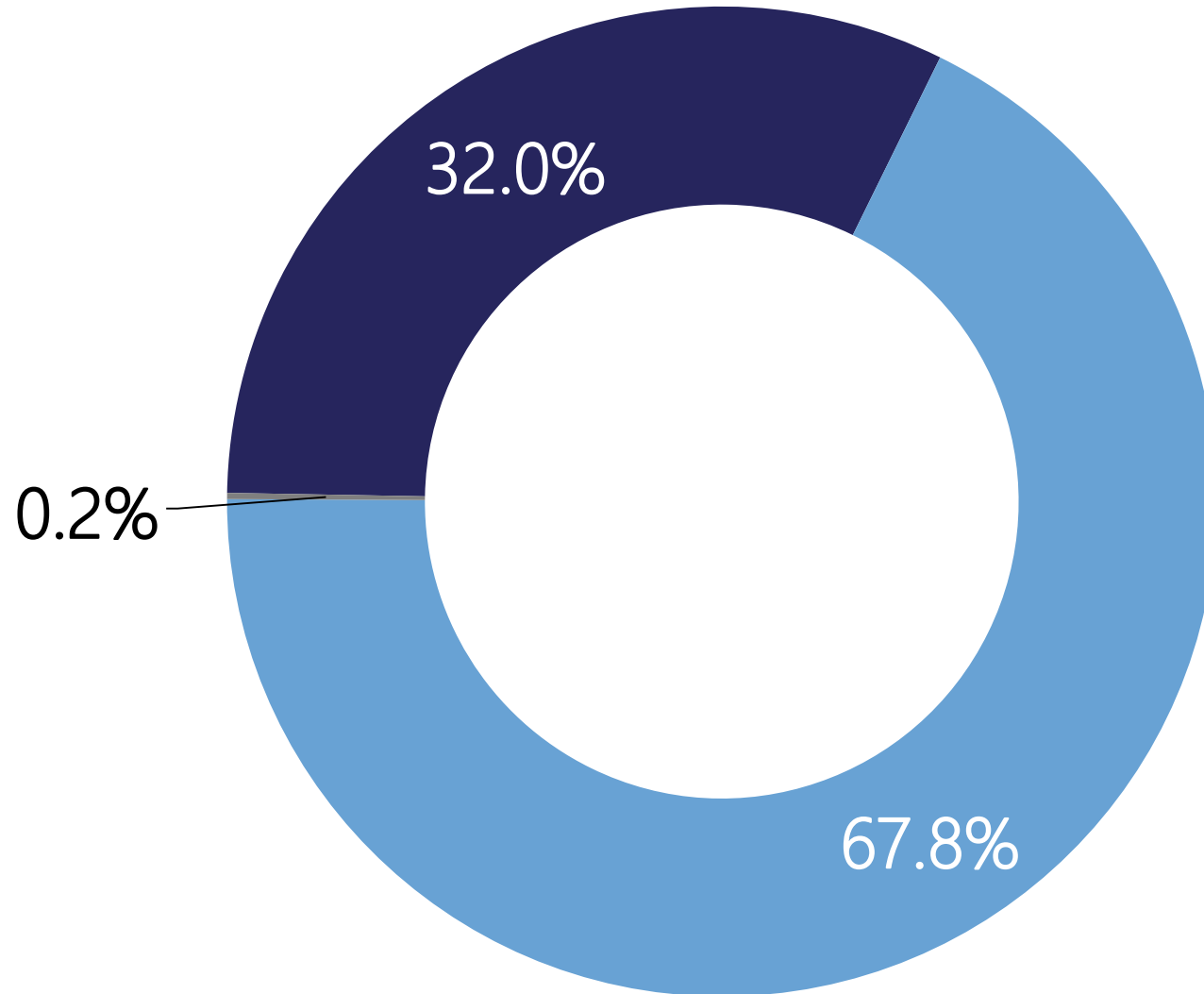
Approximately two-thirds (65.3%) of visitors indicated that their trip was related to Penn State.

PENN STATE ALUMNI



About two-fifths (39.9%) of visitors had at least one Penn State alum in their travel party.

PENN STATE CONNECTION



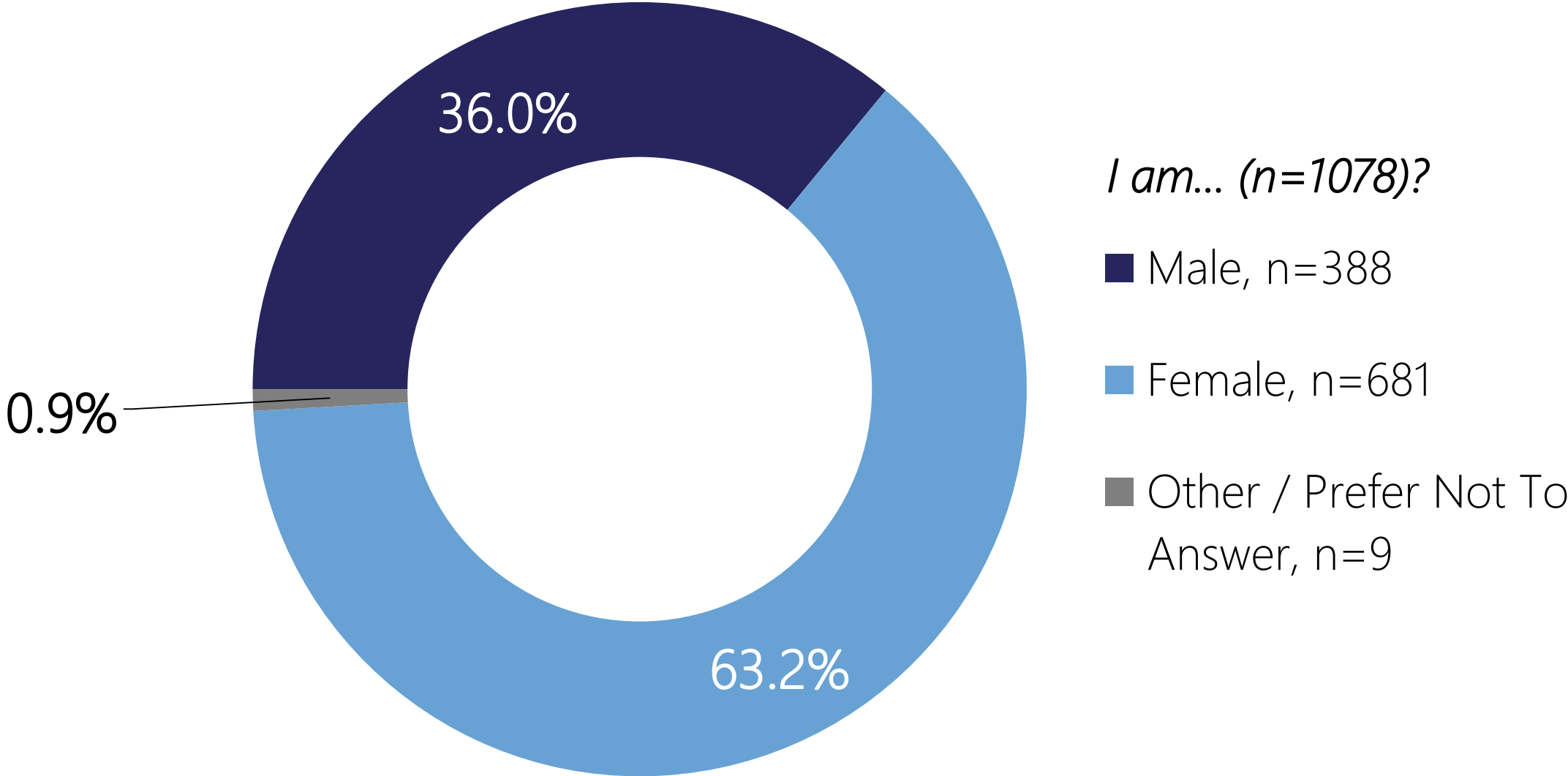
Do you or anyone you are traveling with have a family member who is currently enrolled at Penn State (n=1082)?

- Yes, n=346
- No, n=734
- Not Sure, n=2

About one-third (32%) of travel parties had a family member who was currently enrolled at Penn State.

DEMOGRAPHICS

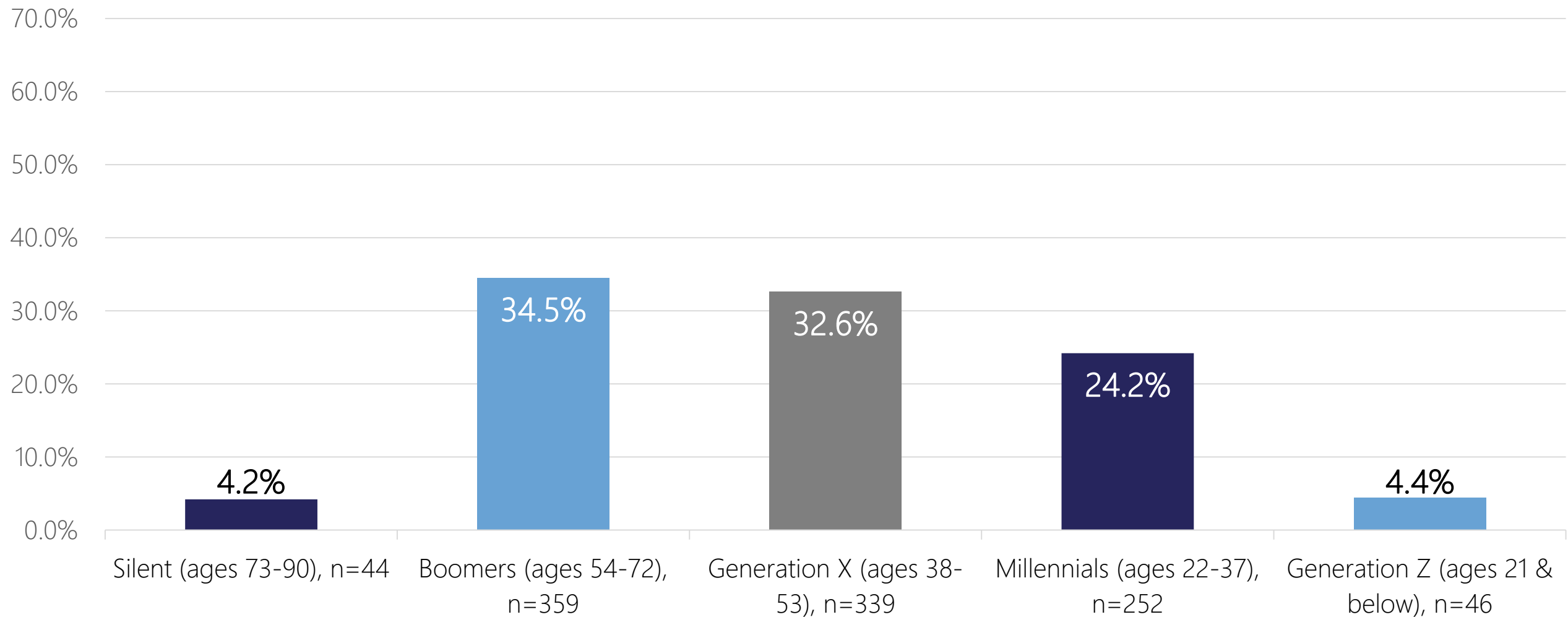
GENDER



More than three-in-five (63.2%) visitors were female.

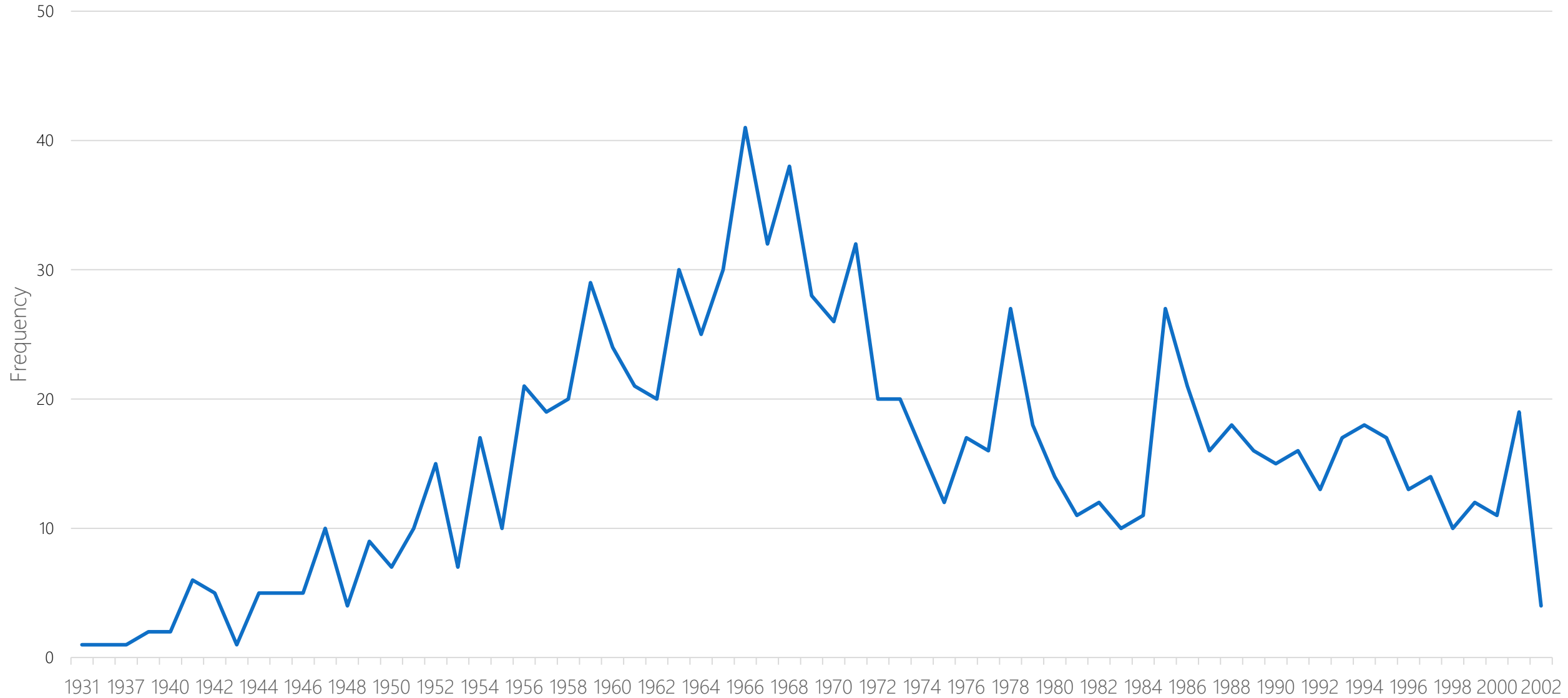
AGE – BY GENERATION

In what year were you born (n=1040)?



The most common generations of visitors were Boomers (34.5%) and Generation X (32.6%).

AGE – BY BIRTH YEAR



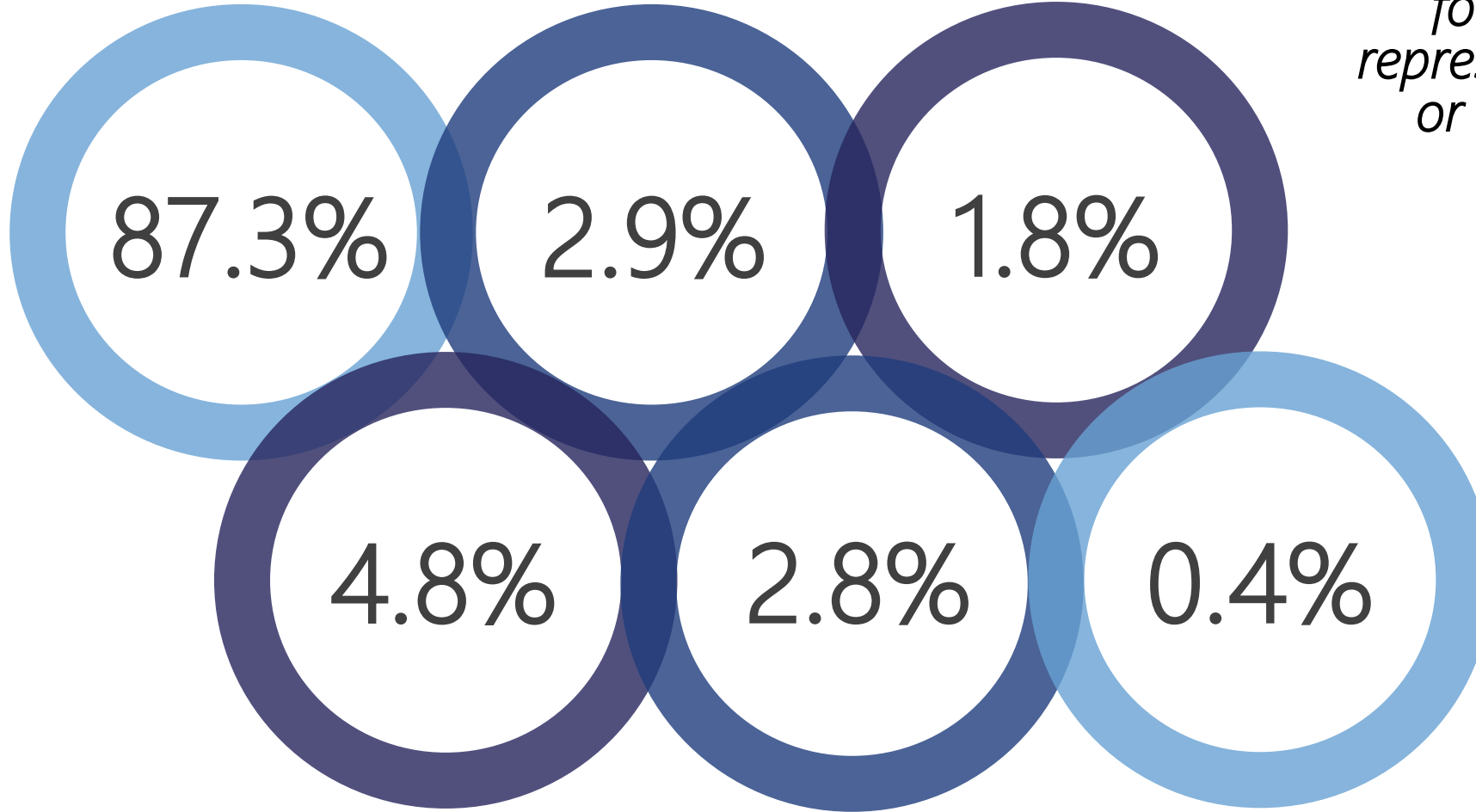
RACE/ETHNICITY

White / Caucasian, n=943

Black / African American, n=31

Hispanic, n=20

Which of the following best represents your race or ethnic origin (n=1080)?



Asian, n=52

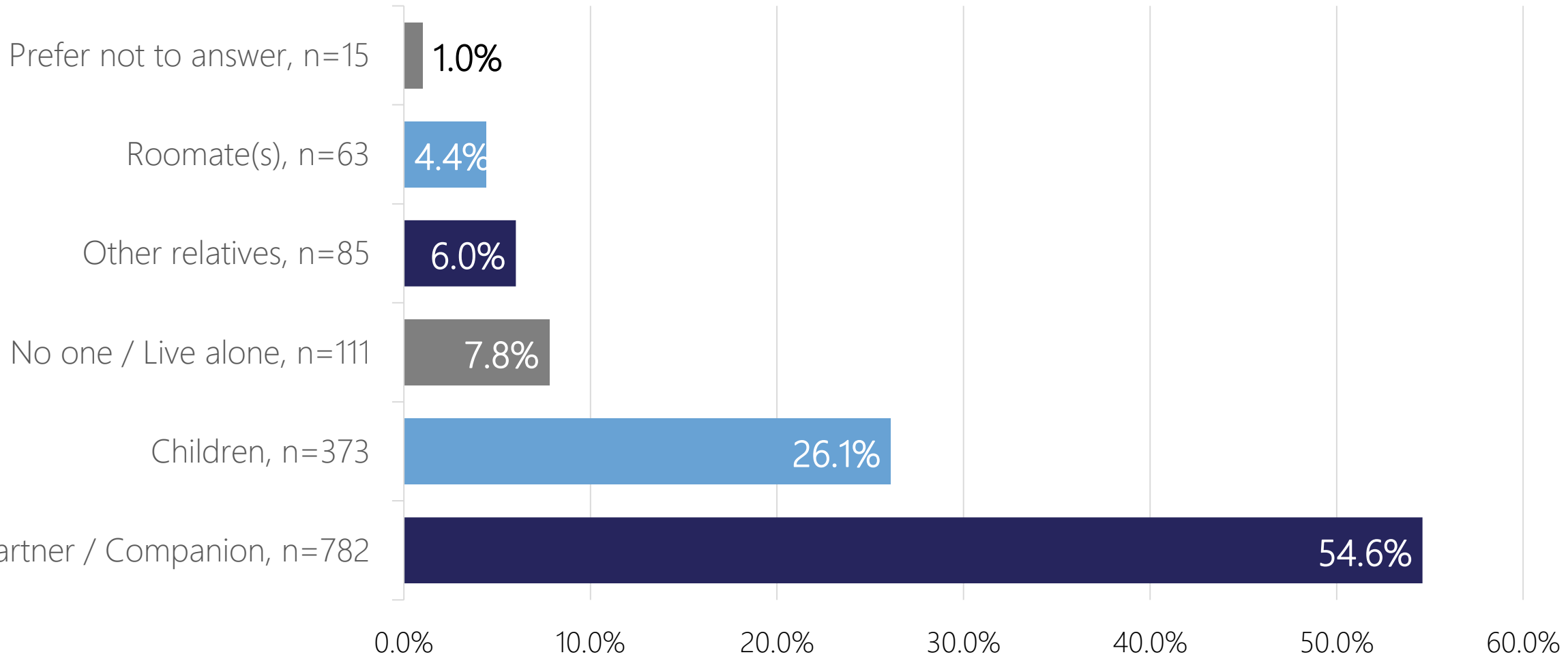
Other / Prefer Not To Answer, n=30

American Indian / Alaska Native, n=4

A majority (87.3%) of visitors identified as White / Caucasian.

HOUSEHOLD COMPOSITION

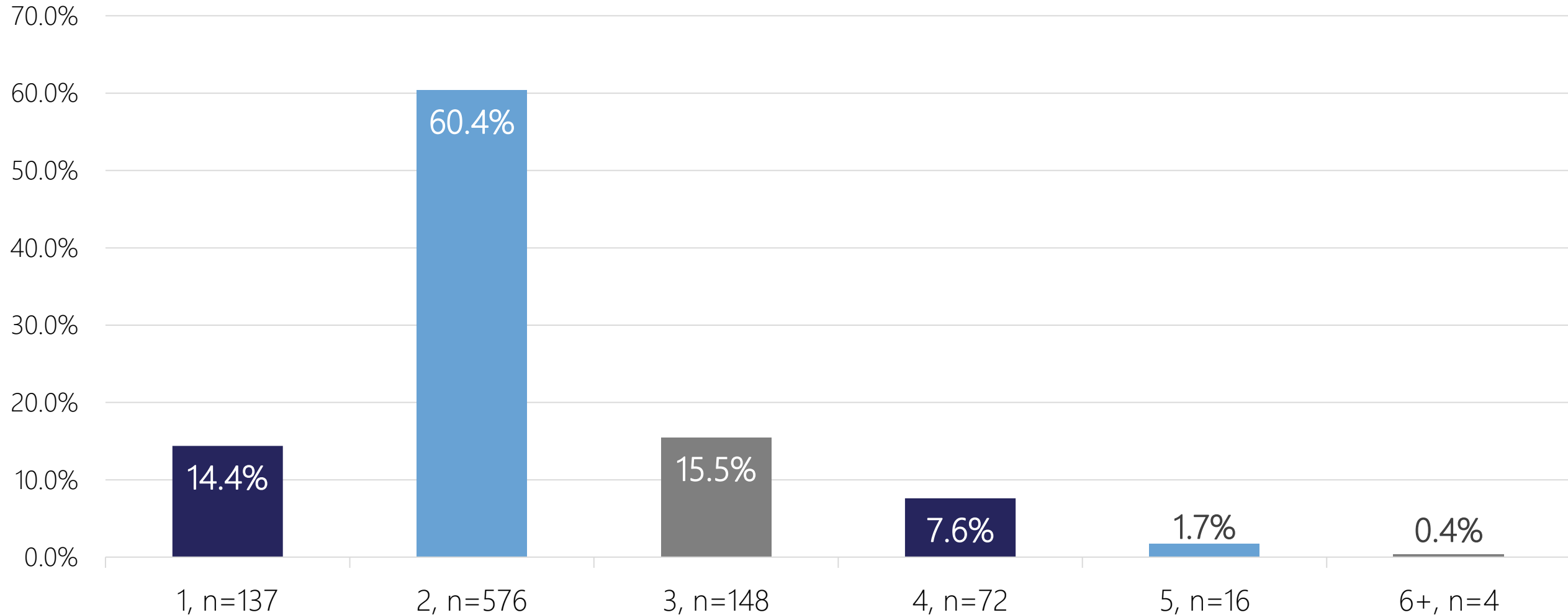
Who currently lives in your household with you? Please mark ALL that apply?



Over half (54.6%) of visitors had a significant other living in the household.

HOUSEHOLD COMPOSITION – NUMBER OF ADULTS

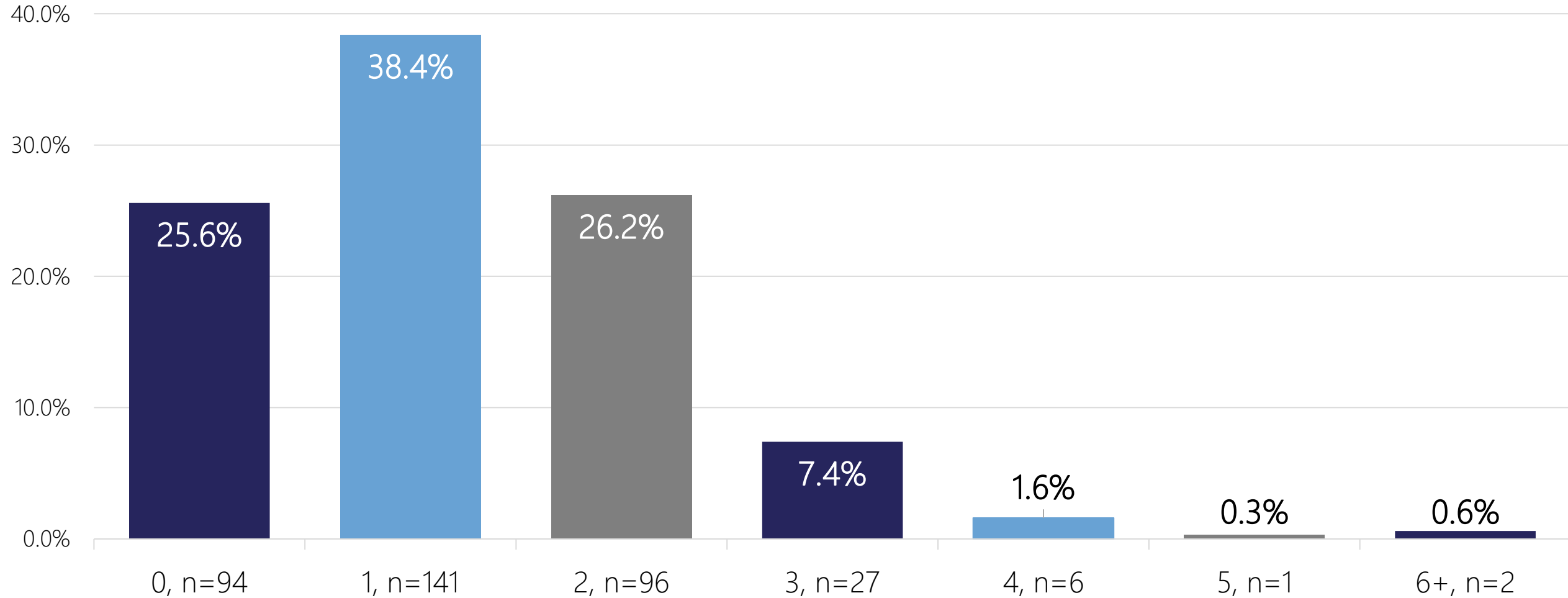
How many adults, including yourself, live in your household (n=953)?



Over half (60.4%) of visitors had 2 adults living in the household.

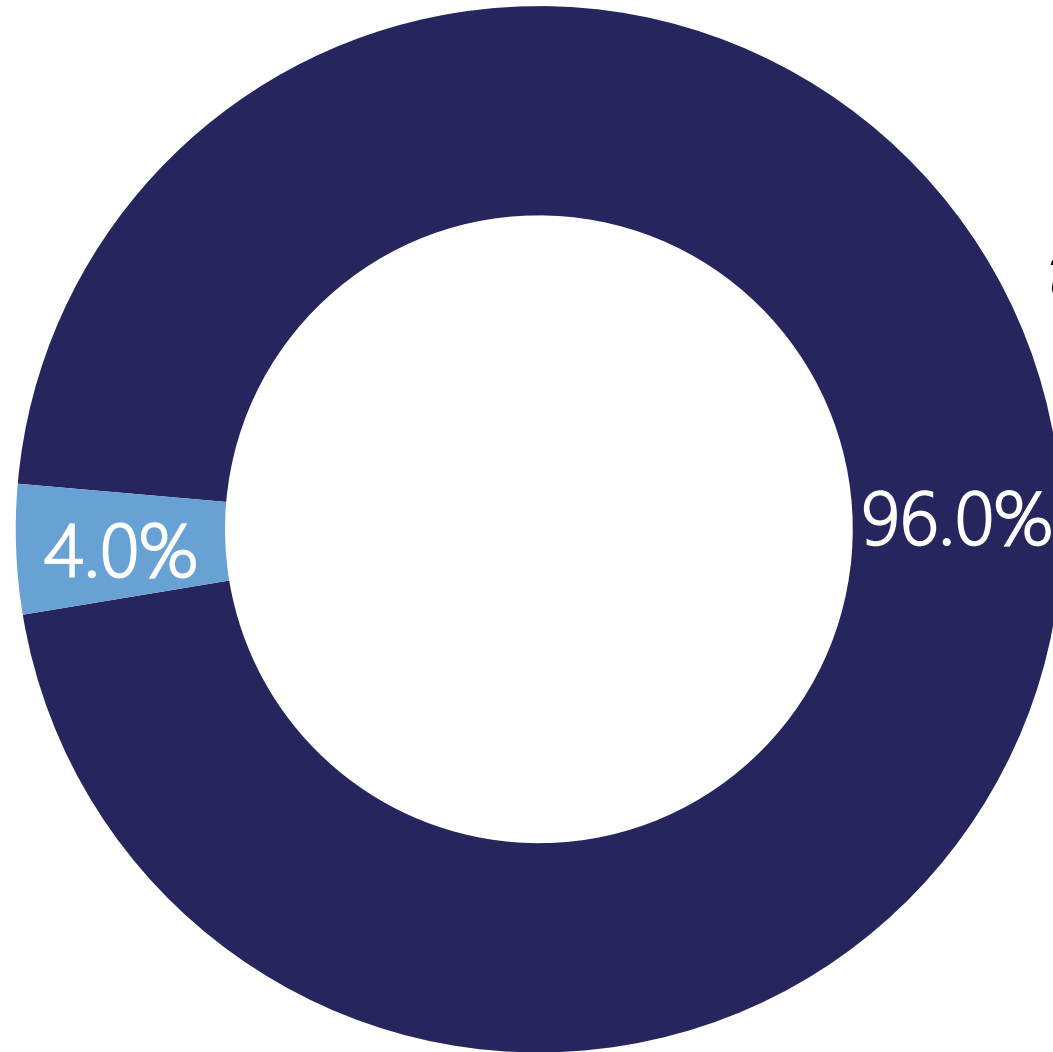
HOUSEHOLD COMPOSITION – PRESENCE OF CHILDREN

How many children under 18 live in your household (n=367)?



Over one-third (38.4%) of visitors had 1 child living in the household.

COUNTRY OF RESIDENCE



Do you currently reside in the United States of America (n=1085)?

■ Yes, n=1042

■ No, n=43

An overwhelming majority (96.0%) of visitors resided in the United States.

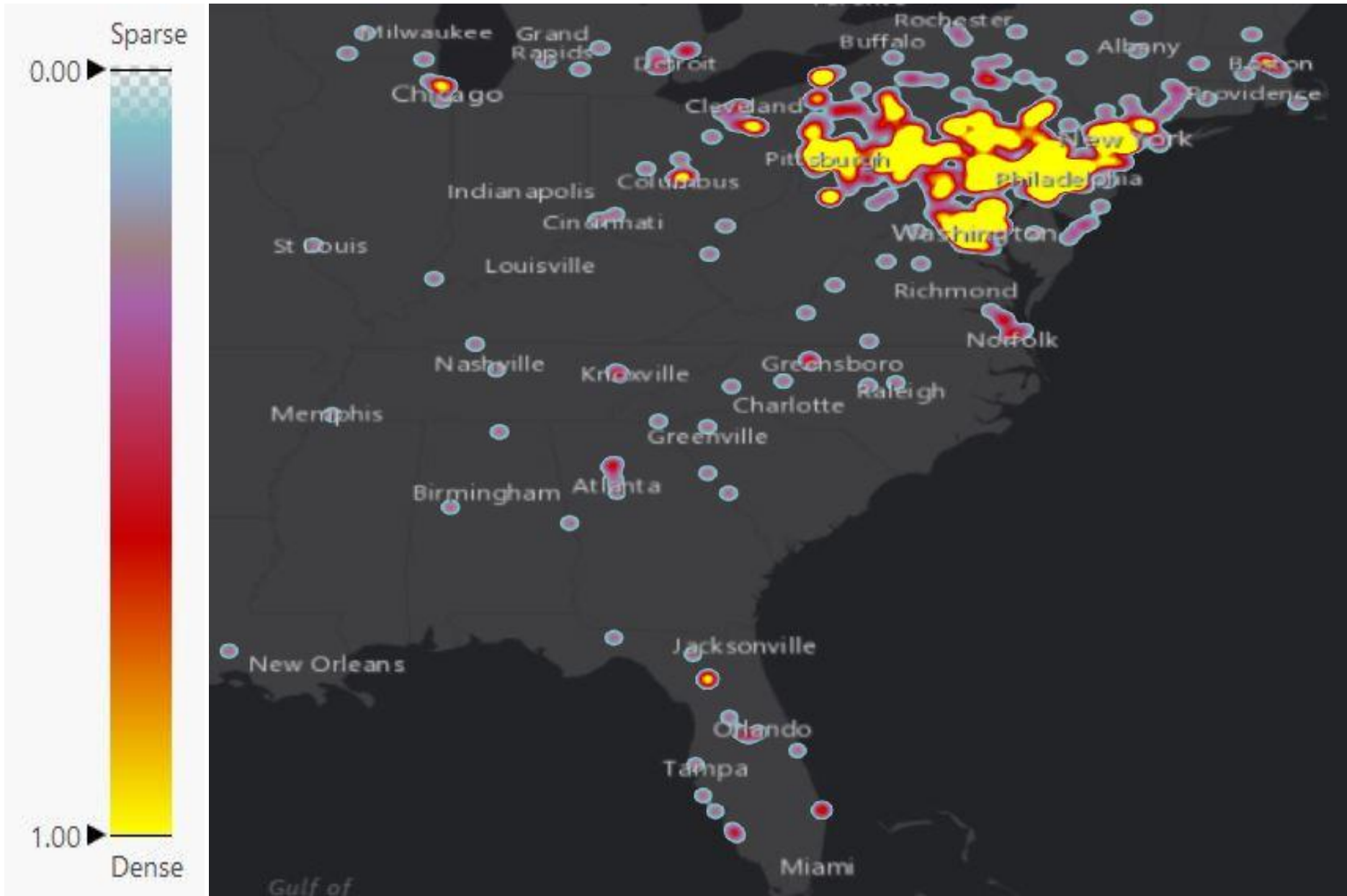
U.S. RESIDENCE BY STATE

State	Frequency	Percent
Pennsylvania	668	64.7%
New Jersey	48	4.7%
Maryland	46	4.4%
New York	39	3.8%
Virginia	38	3.7%
Ohio	23	2.2%
Florida	20	1.9%
Michigan	17	1.6%
California	11	1.1%
West Virginia	11	1.1%
Delaware	10	1.0%
Connecticut	10	1.0%
Other	91	8.8%
Total	1035	100%

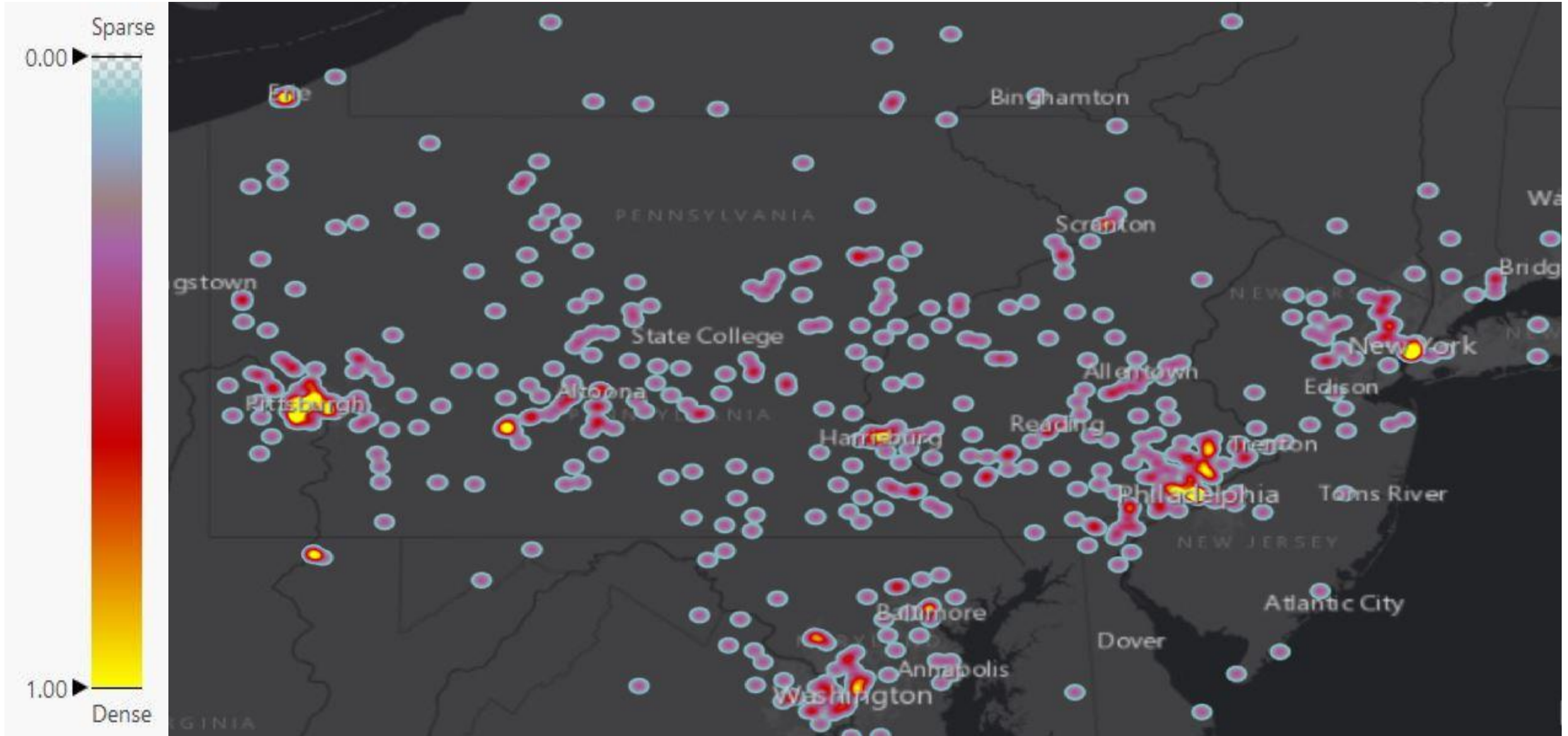
In which state do you currently reside (n=1032)?

The most common state of residence for visitors was Pennsylvania (64.7%).

U.S. RESIDENCE BY ZIP CODE – EAST COAST HEAT MAP



U.S. RESIDENCE BY ZIP CODE – REGIONAL HEAT MAP



COUNTRY OF RESIDENCE FOR INTERNATIONAL VISITORS

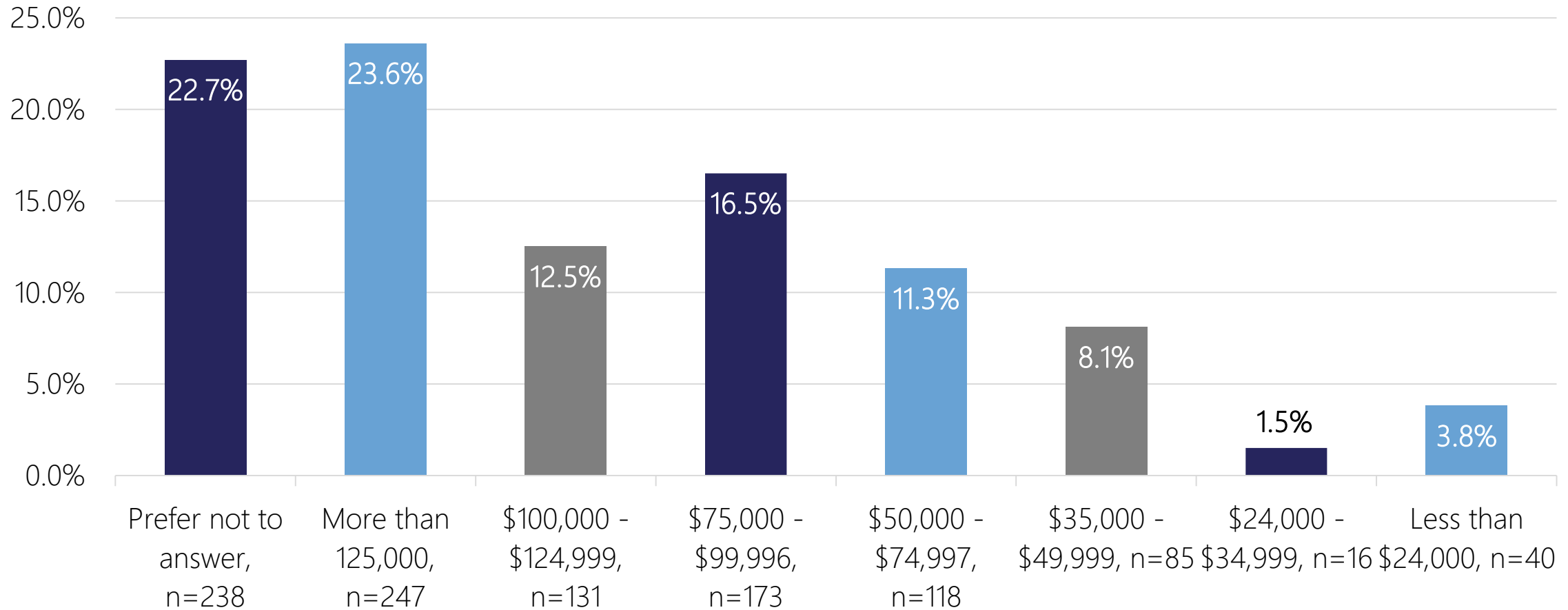
Country	Frequency	Percent
China	12	30.8%
Japan	5	12.8%
Canada	3	7.7%
Mexico	3	7.7%
France	2	5.1%
Zambia	2	5.1%
South Africa	2	5.1%
United Kingdom	2	5.1%
Other	8	20.8%
Total	39	100.0%

In which country do you currently reside (n=39)?

The most common country of residence for international visitors was China (30.8%).

ANNUAL HOUSEHOLD INCOME

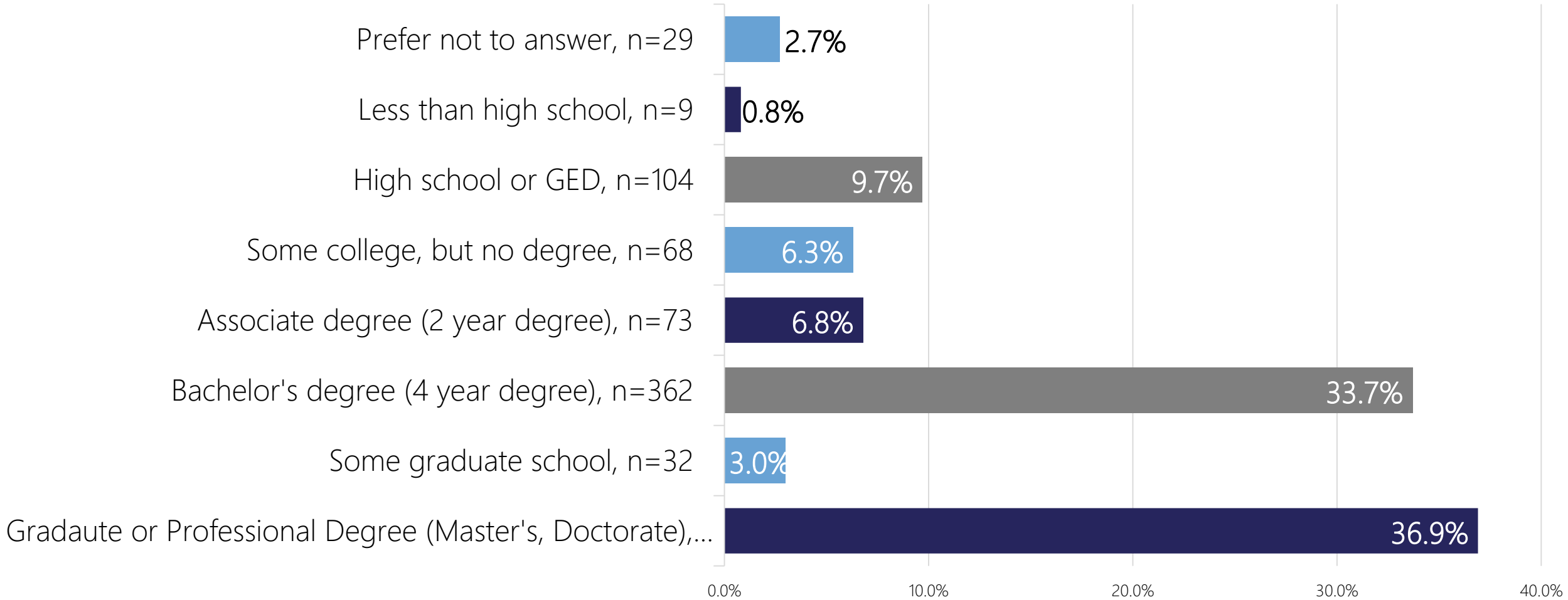
Which of the following categories contains your 2018 household income from all sources before taxes (n=1048)?



Visitors tended to have a high socio-economic status, with almost one-quarter (23.6%) earning more than \$125,000 in 2018.

EDUCATION LEVEL

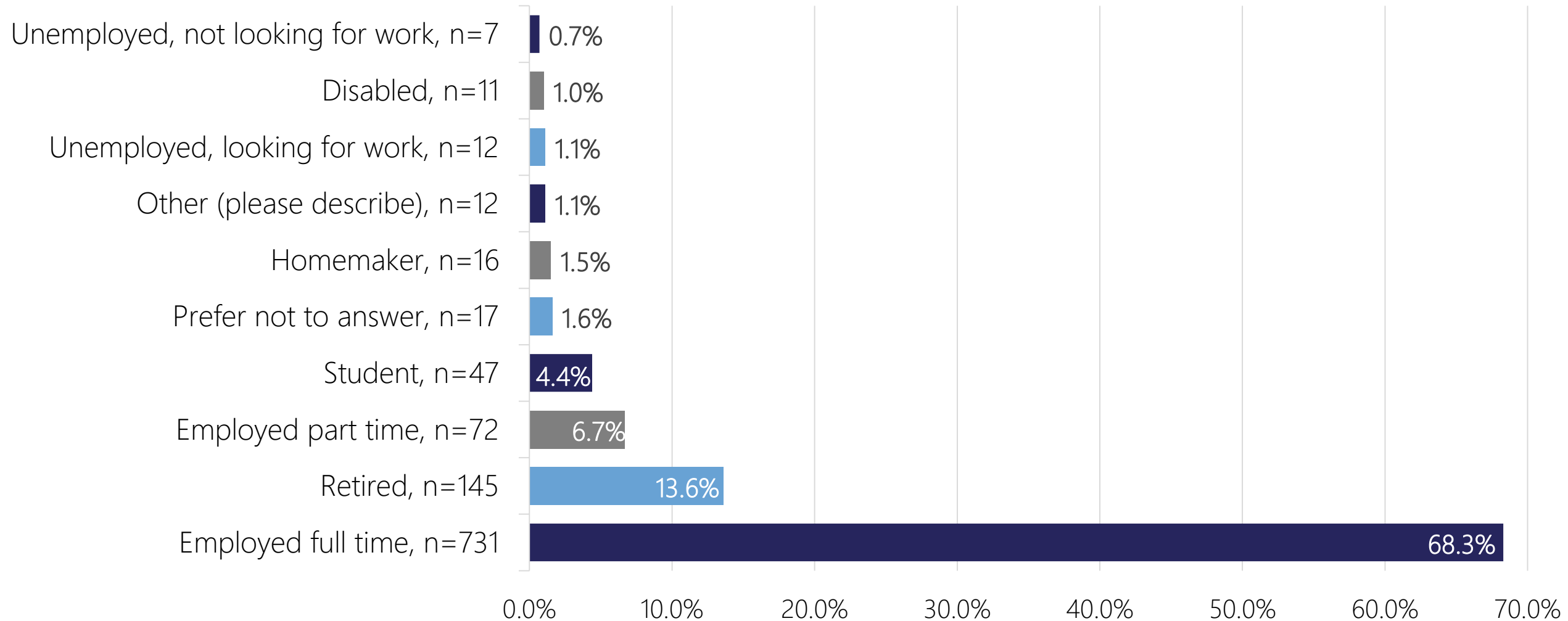
What is the highest level of education you have completed (n=1073)?



Visitors were highly educated, with over one-third each earning a Bachelor's (33.7%) or Graduate/Professional (36.9%) degree.

EMPLOYMENT STATUS

What best describes your employment status (n=1070)?



Over two-thirds (68.3%) of visitors were employed full time.