

# **Bus Tours and Bus Passengers: Impact on Local Economies**

**American Bus Association**

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Washington, D.C.

February 2002





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## **TABLE OF CONTENTS**

**EXECUTIVE SUMMARY, 5**

**INTRODUCTION, 10**

**SURVEY FINDINGS, 10**

**Survey One: Bus Company Survey Findings, 10**

**Survey Two: Local Business Survey Findings, 14**

**Tour Passenger Surveys, 16**

*Survey Three: Day Passenger Survey Findings, 16*

*Survey Four: Overnight Passenger Survey Findings, 24*

**Survey Five: Bus Terminal Survey Findings, 32**

**ECONOMIC IMPACT ANALYSIS, 38**

**Summary of Findings by Trip Type and Destination, 38**

*Average Package Price, 38*

*Percent Remaining in Local Area, 39*

*Number of Passengers Per Bus, 39*

*Additional Amount Spent Per Passenger, 39*

**Overall Economic Impact on the Destinations Surveyed, 39**

**Impact of Passengers on Regularly Scheduled Bus Service, 40**

**ANALYSIS, 41**

**Estimating Economic Impact on Other Destinations, 41**

**Conclusion, 43**



# Executive Summary

## INTRODUCTION

Destination marketers and travel industry suppliers have long known that a significant share of their visitors either arrive by motorcoach or join a group for sightseeing or transportation at some point in their visit. Now, with the publication of this report on a series of surveys performed by a research team from The George Washington University (GWU), tourism stakeholders can better quantify the nature and economic impact of those visitors on the places they visit. The GWU team conducted five separate surveys to profile the nature and scope of bus tour expenditures among five distinct groups:

- Motorcoach operators
- Local businesses that serve travelers
- Overnight tour passengers
- Single-day charter passengers
- Passengers in scheduled intercity bus terminals

The primary objectives of the study were to:

- Identify bus tour characteristics including frequency, duration, type of accommodations, local attractions, tour size, and average price of package.
- Create three distinct formulas based on the data collected that cities can use to determine the economic impact of bus tours in their specific area.
- Determine the impact of bus tours on local businesses in the areas studied.
- Estimate the economic impact of bus passengers on regular scheduled bus service.

## METHODOLOGY

All work for the study was done in the field in New York City, Washington, D.C., and Lancaster, Pa., three tourism destinations with unique attractions and characteristics. The study, commissioned by the American Bus Association, was implemented between January 2001 and July 2001.

Data for this study was collected from nine major bus companies primarily located in the North East, over 900 bus tour passengers on day and over night tours in Washington, D.C., Lancaster, Pa. and New York, N.Y., 394 bus passengers on regular scheduled bus service from either Washington, D.C. or New York City and 28 local businesses. Surveys were mailed to the bus companies with follow-up phone interviews. Trained data collectors met bus tours at specific points in their itineraries and distributed surveys to individual bus tour passengers. These same data collectors

were assigned to bus terminals to collect data from regular service passengers. Local businesses were mailed surveys and also interviewed in person.<sup>1</sup>

## **SURVEY RESULTS**

### **Survey One: Bus Company Profile**

Bus companies—that is, operators of motorcoach charters or tours—were asked to provide information on tour itineraries, passenger loads, and costs in each of the destinations studied. The average total hours spent by bus tours were reported to be 20.4 hours in Washington, 14.1 hours in Lancaster, and 14.6 hours in New York. The average total number of nights spent in each destination was reported to be 1.3 in Washington, 0.7 in Lancaster, and 1.0 in New York. The average number of day passengers per bus was 39.1 for Washington, 45.7 for Lancaster, and 45.0 for New York. The average number of overnight passengers was 45.4 for Washington, 38.1 for Lancaster, and 38.4 for New York.

For overnight tours, the bus companies tended to stay in three and four star accommodations with Best Western, Choice Hotels, Hampton Inn, Holiday Inn, and Travelodge being cited most frequently. For meals, most of the bus companies reported using full-service restaurants that were unique to the area versus chain establishments.

The average amount spent per bus on accommodations, meals, attractions, fuel and additional fees in each of the destinations was \$4,780.31 in Washington, \$4302.01 in Lancaster, and \$7,107.47 in New York. The average price of tours ranged from \$58.80 for a Washington, day tour to \$900.00 for a 3-day trip to New York City. Of this price, approximately 63.9% remained in Washington, 62.1% remained in Lancaster, and 47.1% remained in New York.

### **Survey Two: Local Business Survey**

Local restaurants, retailers, hotels, and attractions were surveyed in each of the three destinations to determine the importance of bus tours to their individual businesses. The estimated share of total business generated from bus tours per quarter ranged from a low of 18.3 percent January through March to a high of 40% April through June. The estimated amount spent per bus passenger at each of these establishments was \$15 at restaurants, \$35 at retail locations, \$268.12 at hotels and \$35 at attractions. Ninety percent of the businesses rated the importance of bus tours to their business as “Very Important” or “Somewhat Important.”

### **Survey Three: Day Trip Passenger Survey**

Day trip bus passengers were asked to complete a survey regarding their expenditures and demographics. The average price paid for a day-trip bus tour was \$74.34. Sixty-

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<sup>1</sup> All data was analyzed using StatView, a statistical software package.

two percent reported that lunch was included and 21% reported that dinner was included. Passengers spent an additional \$22.69 on meals, retail, transportation and tourist attractions. More females (62%) than males (38%) completed the survey. The majority of passengers fell between 45-74 years in age, 58% were married, 47% were retired, 16% were students, 42% completed college, and 37% made less than \$50,000 per year. Ninety-two percent (92%) of the passengers said that they would like to return to the destination and 98% would recommend the destination to their friends and family.

#### **Survey Four: Overnight Passenger Survey**

Passengers on overnight bus tours (tours including one or more overnight stays) were asked to complete a survey regarding their expenditures and demographics. The average price paid for an overnight bus tour was \$448.71 with the average length of stay being 3.1 nights. Most of the tours included some meals in the package price with the average including 2.3 breakfasts, 2.4 lunches, and 2.1 dinners. Passengers spent an additional \$75.84 on meals, retail, transportation and tourist attractions. More females (61%) than males (39%) completed the survey. Approximately half of the respondents were 17 years old or under representing school groups, 56% were single (never married) and 47% had an income level of \$50,000 or less. Ninety-five percent (95%) of the passengers said that they would like to return to the destination and 99% would recommend the destination to their friends and family.

#### **Survey Five: Bus Terminal Survey**

Passengers traveling independently on regularly scheduled buses were asked to complete a survey regarding their expenditures, travel behaviors, and demographics. The majority of passengers (51%) were traveling between Washington, DC and New York City with the other passengers traveling to various destinations across the United States but primarily on the East Coast. The main reason for traveling by bus was cost (63%), followed by ease of travel (21%). The main reason for selecting a particular bus company was also cited as cost. Twenty-eight percent (28%) said that they travel by bus “very often” or “fairly often” with 15% reporting this to be their first time traveling by scheduled bus service. The average amount spent on a bus ticket was \$67.14. The amount spent in the travel destination was \$91.71. Of the 43.4% that reported staying in paid accommodations (not staying with family or friend), the average amount spent on accommodations was \$46.47. The largest percent of passengers were between 18-24 years old (45%) followed by 20% in the 25-34 year old category. More males (58%) than females (42%) responded to the bus terminal survey. Thirty-six percent were students and 33% had finished college. Fifty-four percent (54%) had an income level of \$50,000 or less.

## **ANALYSIS**

Based on the figures reported by bus companies and tour passengers, there is little doubt that the economic impact of bus travel is significant, and that charter and tour bus passengers experience a high level of satisfaction with both individual tour components and the destinations visited. The local businesses studied proved well aware of the economic importance of bus visits to their own business, in terms of both the revenues taken in from bus groups and their relative share of overall business.

By applying the survey data to a mathematical formula that takes into account these new findings (average package price, the percent that remains in the local area, the number of passengers per bus, and the additional amount spent per passenger), the total economic impact of a bus visit can be estimated for each of the three destinations studied. In addition, though every destination has its own unique mix of attractions and hospitality offerings, the new data yielded by these formulas offers a starting point for other destinations to estimate their own local stake in the motorcoach tourism market.

To use the formulas, local data will still be required. Specifically, local businesses that serve travelers must be surveyed to determine how many overall bus visits they receive on either a weekly, monthly, quarterly or other relevant seasonal basis. Because obtaining specific revenue data traditionally has been the biggest barrier to bus impact data collection in the past, destination marketing organizations may find their data collection burden substantially eased by the formulas in this report.

Next, it will be necessary to determine the average trip duration to the local destination. Annual bus visit data from local lodging businesses can be compared to annual bus visit data from the destination's major local attraction(s) to roughly determine the overall percentage of local bus visits that remain overnight. An inquiry should be made to local lodging businesses as to what rough percentage of motorcoach groups stay for more than one night, as this figure varies most from place to place based on the nature and number of nearby attractions that support it as a motorcoach tour "hub." A general U.S. and Canadian finding has been that 72 percent of bus visits are day trips and 28 percent of bus visits are by groups staying one night or more.<sup>2</sup>

Motorcoach operators can utilize this data to support their efforts for enhanced bus amenities such as access and parking and more informed oversight at the local level. In addition, destinations can use this data to help shape their own marketing efforts and determine the appropriate level of attention and investment to dedicate to bus tour operators and the group travel segment. To aid in this analysis and planning, the full report offers a formula for calculating the overall economic impact of bus tours on the three surveyed destinations. Destinations interested in applying this formula to their own situation should consider which of the three studied sites most closely matches their own and use or adapt the data provided for that destination. To use the model

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<sup>2</sup> Breakout of day trips versus overnights is based on an October 1996 survey of 33 million U.S. and Canadian motorcoach travelers by Longwoods International, sponsored by the American Bus Association.

below, choose a “destination type” and combine the products of the three corresponding columns to estimate annual economic impact.

<b>Destination Type:</b>	Multiply the number of <b>day-trip</b> buses by this number	Multiply the number of <b>one-night bus tours</b> per year by this number	Multiply the number of <b>two-night bus tours</b> per year by this number
<b>Historical/ Cultural Destination</b> , like Washington D.C., with a number of popular monuments, museums, and places of historical interest, use these per-bus value figures:	\$2,536	\$7,685	\$12,199
<b>Rural/ Ethnic Destination</b> like Lancaster, Pa., in a more rural setting, with outlet shopping, local food and flavor, and an emphasis on cultural heritage and ethnic tourism, use these per-bus value figures:	\$2,415	\$5,094	\$9,021
<b>Major Cosmopolitan Destination</b> like New York City, in or close to a major city, dense with restaurants and lots of entertainment and shopping, use these per-bus value figures	\$4,563	\$11,264	\$16,080

## CONCLUSION

No two travel destinations are the same. The characteristics of local geography, regional populations, attractions, weather, accessibility, history and cultural relevance make it difficult to precisely assign dollar values and estimate impacts to the diverse motorcoach tourism that may be experienced in various locales. Still, the survey findings demonstrate that motorcoach tour groups comprise a dynamic and powerful economic force that should be considered when formulating public policy, transportation and overall city planning. Destination marketers can now engage in more informed planning and budgeting in order to both attract motorcoach tour groups, and serve them successfully, so that tour operators will be encouraged to return, ultimately as partners in their success.

# Bus Tours and Bus Passengers: Impact on Local Economies

## INTRODUCTION

The American Bus Association commissioned the George Washington University to conduct a study to determine the economic impact of bus tours on first and second tier cities, specifically New York City, Washington, D.C. and Lancaster, PA. These cities were selected for their unique tourism characteristics and sampling convenience. The objectives of this study were to:

1. Create three distinct formulas based on the data collected that cities can use to determine the economic impact of bus tours in their specific area.
2. Estimate the economic impact of bus tours in the three cities studied.
3. Determine the impact of bus tours on local businesses in the areas studied.
4. Identify bus tour characteristics including frequency, duration, type of accommodations, local attractions, tour size and average price of package.
5. Estimate the economic impact of bus passengers on regular scheduled bus routes from Washington, D.C. and New York City.

To achieve these objectives, five different surveys were created and disseminated:

- Bus company survey
- Local business survey
- Overnight passenger survey
- Day passenger survey
- Bus terminal surveys

Findings from these surveys are included in this report.

## SURVEY FINDINGS

### Survey One: Bus Company Survey

The “Bus Company Survey” (see appendix A) collected data on tour characteristics and bus company expenditures in local areas. A list of bus companies conducting day trip and overnight business in each of the three study areas was received from the ABA. The companies conducting the most tours in each area were selected to participate in the study. A total of 20 bus companies were mailed the survey at the end of January 2001. Follow-up phone calls and e-mails were made every two weeks in an attempt to increase the response rate. Nine companies ultimately responded for a 45% response rate.

The sample included three companies that took day and night trips to all three cities, two companies that took just day trips to all three cities, one company that took just night trips to all three cities, one company that took just night trips to Washington and just day trips to Lancaster and New York, one company that took just day trips to Washington and Lancaster and just night trips to New York and one company that took just night trips to Washington and New York and both day and night trips to Lancaster.

On average, the companies reported taking 69.3 day trips to Washington, 33.0 to Lancaster and 14.6 to New York. The average overnight trips reported by these companies were 25.4 to Washington, 18.9 to Lancaster and 8.3 to New York.

The bus companies reported traveling an average of 458 miles to Washington, 327 miles to Lancaster and 433 miles to New York.

The average number of nights spent in each destination was 1.3 for Washington, 0.7 for Lancaster and 1.0 for New York.

The average total hours spent in each destination were reported to be 20.4 hours in Washington, 14.1 hours in Lancaster and 14.6 hours in New York.

The average number of day passengers per bus was 39.1 for Washington, 45.7 for Lancaster and 45.0 for New York. The average number of overnight passengers was 45.4 for Washington, 38.1 for Lancaster and 38.4 for New York.

As far as the **type of hotels** used in each of the destinations:

- **Washington:** four companies (44%) reported using four star hotels, three (33%) reported using three star hotels, one (11%) company reported using less than three star hotels and one company did not answer this question.
- **Lancaster:** three companies (43%) reported using four star hotels, three (43%) reported using three star hotels and one (14%) reported using less than three star hotels.
- **New York:** three companies (43%) reported using four star hotels, three (43%) reported using three star hotels and one (14%) reported using less than three star hotels.

The **hotels most commonly visited** by the bus companies:

- **Washington:** Best Western, Holiday Inn, Days Inn, Econolodge, Hampton Inn, Comfort Inn, Howard Johnson, Quality Inn, Ramada Inn, Choice Hotels, Fairfield Inn and Travelodge.
- **Lancaster:** Best Western, Choice Hotels, Comfort Inn, Holiday Inn, Hampton Inn, Travelodge, Milford Plaza and Your Place Country Inn.
- **New York:** Best Western, Choice Hotels, Days Inn, Hampton Inn, Quality Inn, Ramada Inn, Holiday Inn, Travelodge and La Quinta Inn.

The **restaurants most commonly visited** by the bus companies:

- **Washington:** Old Country Buffet, Phillips Seafood, Filomena, Hogate's, Union Station, Hard Rock Café, Pier 7, Tony & Joe's and Odyssey Cruise. Of restaurants listed for Washington, one was fast food while the rest were full-service restaurants.
- **Lancaster:** Amish Experience, Hershey Farms, Miller's Smorgasbord, Strasberg Inn, Willow Valley, Plain and Fancy, Bird in the Hand, Cracker Barrel, Good & Plenty, Stoltzfus Restaurant and Your Place Country Inn. Of restaurants listed for Lancaster, all were full-service restaurants.
- **New York:** Crust-On Own, Lisa's Catering, Tavern on the Green, Carmine's, Ernie's, Marriott Marquis, Tutto Bene, World Yacht Lunch, Bradigano, Hard Rock Café and Sparks. Of restaurants listed for New York, all were full-service restaurants.

The **attractions most commonly** visited by bus companies:

- **Washington:** Ford's Theater, The Smithsonian, Step-on-Guide, Washington Monument, Arlington Cemetery, Lincoln Memorial, the White House, the Air and Space Museum, Capitol Hill, the Holocaust Museum, the Kennedy Center, the Vietnam War Memorial and Odyssey Cruise
- **Lancaster:** the American Music Theater, Millennium Theater, Rainbow Theater, Dutch Apple Dinner Theater, Amish Country, Dutch Country, Rockvale Mall, Outlet Center, Sturgis Pretzel, Kitchen Kettle Village, Strasberg Railroad and Moravian Church Tour.
- **New York:** Broadway, the Theater District, NASDAQ, Ellis Island, Yankee Stadium, Empire State Building, Museum of Natural History, Radio City Music Hall, United Nations and World Yacht Cruise.

The **shopping areas most commonly** visited by bus companies:

- **Washington:** Union Station, Georgetown and the Old Post Office Pavillion
- **Lancaster:** Outlet Centers, Rackvale Square, Tangiers Mall and Kitchen Kettle Village.
- **New York:** Grand Central Station, South Street Seaport, 5<sup>th</sup> Avenue and Macy's.

The **average amount spent per bus (by bus companies) on hotel accommodations:**

- **Washington:** \$2,547.14
- **Lancaster:** \$2,089.17
- **New York:** \$3,655.83

The **average meal spending per bus (by bus companies):**

- **Washington:** \$1,059.50
- **Lancaster:** \$898.13
- **New York:** \$1,437.14

The **average spent on attractions per bus (by bus companies):**

- **Washington:** \$1,000.00
- **Lancaster:** \$1,170.71
- **New York:** \$1,891.00

The average spending on fuel per bus (by the bus companies):

- **Washington:** \$98.67
- **Lancaster:** \$69.00
- **New York:** \$91.00

And for **additional fees**, the bus companies reported spending an average of \$75.00 in Washington, \$75.00 in Lancaster and \$32.50 in New York.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>
<b>Accommodations</b>	\$2,547.14	\$2,089.17	\$3,655.83
<b>Meals</b>	\$1,059.50	\$898.13	\$1,437.14
<b>Attractions</b>	\$1,000.00	\$1,170.71	\$1,891.00
<b>Fuel</b>	\$98.67	\$69.00	\$91.00
<b>Fees</b>	\$75.00	\$75.00	\$32.50

Table 1. Amounts spent, listed by city

In terms of the **total bus tour package price** (see table 2 below), the average price reported for a day trip was \$58.80 to Washington, \$64.17 to Lancaster and \$81.38 to New York. The average price for a one-night trip was \$179.00 to Washington, \$171.00 to Lancaster and \$316.00 to New York. The average price for a two-night trip was \$334.60 to Washington, \$337.00 to Lancaster and \$579.00 to New York. The only company reporting to have a three-night trip to New York reported \$900.00.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>
<b>Day Trip</b>	\$58.80	\$64.17	\$81.38
<b>One Night Trip</b>	\$179.00	\$171.00	\$316.00
<b>Two Night Trip</b>	\$334.60	\$337.00	\$579.00
<b>Three Night Trip</b>	N/A	N/A	\$900.00

Table 2. Amount spent on specified number of days, listed by city

When asked what percentage of the total tour package price per person remains in the local area, the bus companies reported that 63.9% remained in Washington, 62.1% remained in Lancaster and 47.1% remained in New York.

## Survey Two: Local Business Survey Findings

Local businesses were surveyed in each of the three destinations to determine the importance of bus tours to their individual business. Of the 50 local businesses asked to participate, 33 responded. In Washington, the responses were from eight hotels, three restaurants and two retailers. In Lancaster, the responses were from two attractions, two hotels, four restaurants and two retailers. In New York, the responses were from six hotels, two restaurants and one retailer. This constitutes a 66 percent response rate. The businesses that responded were restaurants, hotels, retailers and attractions. From those that responded from each of the three tourism destinations, the following data was collected.

On average, the **percent of business** (see tables 3-6 below) attributed to bus tour passengers per quarter in Washington was 20.5% for January to March and 33% for April to June, 21.3% for July to September and 18.8% for October to December. In Lancaster, the business attributed to bus passengers per quarter was 15.6% for January to March, 49.8% from April to June, 49.7% for July to September and 49.8% for October to December. In New York, the business attributed to bus passengers per quarter was 18.1% for January to March, 17.5% for April to June, 11.9% for July to September and 19.1% for October to December. The total average of all three destinations combined was 18.3% for January to March, 40.0% for April to June, 27.7% for July to September and 28.9% for October to December.

The businesses were asked **how many buses** frequented their place of business per quarter. On average, the number of buses stopping at businesses in Washington was 55.6 from January to March, 144.5 from April to June, 106.3 from July to September and 57.9 from October to December. In Lancaster the average was 94.9 from January to March, 694.8 from April to June, 737.4 from July to September and 753.7 from October to December. In New York the average number of stops per quarter were 70.3 from January to March, 151.4 from April to June, 69.6 from July to September and 70.8 from October to December. The total average of all stops in all three destinations was 71.6 from January to March, 323.3 from April to June, 298.7 from July to September and 285.2 from October to December.

	Jan – Mar	April - June	July - Sept	Oct - Dec
<b>% business</b>	18.3	40.0	27.7	28.9
<b># of stops</b>	71.6	323.3	298.7	285.2

Table 3. Quarterly percentages of business attributed to bus tours for Washington, Lancaster, and New York combined and number of buses stopping at businesses

	Jan – Mar	April - June	July - Sept	Oct - Dec
% business	20.5	33.0	21.3	18.8
# of stops	55.6	144.5	106.3	57.9

Table 4. Quarterly percentages of business attributed to bus tours and numbers of buses stopping at businesses for Washington

	Jan - Mar	April – June	July - Sept	Oct - Dec
% business	15.6	49.8	49.7	49.8
# of stops	94.9	694.8	737.4	753.7

Table 5. Quarterly percentages of business attributed to bus tours for Lancaster

	Jan - Mar	April – June	July - Sept	Oct – Dec
% business	18.1	17.5	11.9	19.1
# of stops	70.3	151.4	69.6	70.8

Table 6. Quarterly percentages of business attributed to bus tours for New York

The average amount that each passenger spent at their place of business reported for all three destinations was \$192.34. This average was \$167.46 in Washington, \$53.28 in Lancaster and \$310.50 in New York. When broken down into the different types of businesses, the resulting averages for Washington were \$225.38 for hotels, \$13.00 for restaurants and \$32.50 for retailers. In Lancaster, the averages were \$30.00 for attractions, \$170.00 for hotels, \$15.90 for restaurants and \$40 for retailers. In New York, the averages were \$409.00 for hotels, \$15.00 for restaurants and \$45 for retailers.

When asked to rate the **importance of bus tours to their business** (see table 7 below), 21 companies (64%) reported that they were very important, seven (21%) considered them somewhat important, four (12%) remained neutral and one (3%) reported that buses were not very important to their business. From the businesses in Washington, seven considered buses very important to business, five considered buses somewhat important and one was neutral. In Lancaster, all of the businesses reported that buses were very important to their business except one that was neutral. In New York, four businesses considered buses very important, two reported somewhat important, two remained neutral and one said that buses are not very important to their business.

	<b>Very Important</b>	<b>Somewhat Important</b>	<b>Neutral</b>	<b>Not Very Important</b>	<b>Not Important At All</b>
<b>Washington</b>	7	5	1	0	0
<b>Lancaster</b>	10	0	1	0	0
<b>New York</b>	4	2	2	1	0
<b>Total</b>	21	7	4	1	0

Table 7. Importance of bus tours as reported by local businesses, by city

The final question on the survey asked the business to report **the dollar figure that each bus contributes to their business**. The average from all three destinations was \$6,381.25. The average was \$6,525.90 in Washington, \$2,232.22 in Lancaster and \$10,850.00 in New York. When broken down into the different types of businesses, the resulting averages for Washington were \$8,768.75 for hotels and \$545.00 for restaurants. One food court with 22 vendors reported that the bus business contributed \$2 million dollars worth of business and was very important. In Lancaster the averages were \$1,200.00 for attractions, \$7,250.00 for hotels and \$638.00 for restaurants. In New York the averages were \$14,250.00 for hotels and \$650.00 for restaurants.

### Tour Passenger Survey Findings

Surveys were collected from bus tour passengers on both day and overnight tours. These surveys were designed to determine the amount spent by each passenger in the local area. Demographic information was also gathered to learn more about the people traveling to each destination. A total of 900 surveys were collected from all three cities. The breakdown is shown in table 8 below.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>	<b>Total</b>
<b>Day Surveys</b>	56	200	142	398
<b>Overnight Surveys</b>	244	100	158	502

Table 8. Total number of surveys collected, listed by city

### *Survey Three: Day Passengers*

In the “Day Passenger Survey,” passengers were asked **which meals were included** in their tour package price (see table 9 below). In the combined destinations, 247 (62%) reported that lunch was included and 83 (21%) reported that dinner was included. In the individual destinations, 14 (25%) passengers reported receiving lunch in Washington, in Lancaster 186 (93%) passengers received lunch and 18 (9%) passengers received dinner, in New York 46 (32%) passengers received lunch and 65 (46%) passengers received dinner. No snacks were reported as included for any of the three destinations.

	Washington	Lancaster	New York	Total
<b>Breakfast</b>	0	0	0	0
<b>Lunch</b>	14	186	46	247
<b>Dinner</b>	0	18	65	83
<b>Snacks</b>	0	0	0	0

Table 9. Total number of meals included, listed by city

Passengers were also asked the **additional amount spent on each meal** (see table 10 below). The total average amount spent in the three destinations combined was \$0.91 on breakfast, \$4.73 on lunch, \$2.04 on dinner and \$1.60 on snacks. When broken down into destinations, those visiting Washington reported spending an additional \$1.09 on lunch, \$6.07 on dinner and \$0.80 on snacks, Lancaster passengers spent \$0.10 on breakfast, \$0.27 on lunch and \$2.01 on snacks and New York passengers spent \$2.42 on breakfast, \$11.43 on lunch, \$1.98 on dinner and \$1.33 on snacks. This comes to a total average spending of \$7.96 for Washington, \$4.23 for Lancaster and \$17.16 for New York.

	Washington	Lancaster	New York	All Destinations
<b>Breakfast</b>	\$0.00	\$0.10	\$2.42	\$0.91
<b>Lunch</b>	\$1.09	\$0.27	\$11.43	\$4.73
<b>Dinner</b>	\$6.07	\$0.00	\$1.98	\$2.04
<b>Snacks</b>	\$0.80	\$2.01	\$1.33	\$1.60
<b>Total</b>	\$7.96	\$4.23	\$17.16	\$9.28

Table 10. Additional amounts spent by passengers on meals, listed by city

Questions were also asked about other spending in the local areas such as groceries and necessities bought at retail outlets, gifts and souvenirs, sports equipment rental and antiques and crafts (see table 11 below). The averages spent on these categories for all three destinations were \$0.34 in retail outlets, \$9.64 on gifts/souvenirs, \$0.73 on sport rental and \$1.05 on antiques/crafts. The averages for Washington were \$0.00 in retail outlets, \$16.00 on gifts/souvenirs, \$1.43 on sport rental and \$0.00 on antiques/crafts. The averages for Lancaster were \$0.00 in retail outlets, \$7.08 on gifts/souvenirs, \$0.05 on sport rental and \$1.59 on antiques/crafts. The averages for New York were \$0.97 in retail outlets, \$11.72 on gifts/souvenirs, \$1.40 on sport rental and \$ 0.70 on antiques/crafts.

	Washington	Lancaster	New York	All Destinations
<b>Retail Outlets</b>	\$0.00	\$0.00	\$0.97	\$0.34
<b>Gifts/Souvenirs</b>	\$16.00	\$7.08	\$11.72	\$9.64
<b>Sport Rental</b>	\$1.43	\$0.05	\$1.40	\$0.73
<b>Antiques/Crafts</b>	\$0.00	\$1.59	\$0.70	\$1.05
<b>Total</b>	\$17.43	\$8.72	\$14.79	\$11.76

Table 11. Additional amounts spent on meals, listed by city

**Spending on transportation** while in the destination was reported (see table 12 below). For all day passengers an average of \$0.07 was spent on taxis and \$0.11 was spent on metro buses. No additional spending on transportation was reported for Washington. In Lancaster, the averages were \$0.04 on taxis and \$0.01 on buses. The averages for New York were \$0.14 on taxis and \$0.28 on buses.

	Washington	Lancaster	New York	Total
<b>Taxi</b>	\$0.00	\$0.04	\$0.14	\$0.07
<b>Metro</b>	\$0.64	\$0.01	\$0.28	\$0.11
<b>Total</b>	\$0.64	\$0.05	\$0.42	\$0.18

Table 12. Amount spent on additional transportation, by city

Additional **spending on tourist attractions** was reported (see table 13 below). The combined averages were \$0.10 for sightseeing, \$0.01 for attractions and \$1.14 for theatre. In both Washington and Lancaster no additional tourist spending was reported. The averages for New York were \$0.27 for sightseeing and \$3.10 for theatre.

	Washington	Lancaster	New York	All Destinations
<b>Sightseeing</b>	\$0.00	\$0.00	\$0.27	\$0.10
<b>Attractions</b>	\$0.00	\$0.00	\$0.01	\$0.00
<b>Theatre</b>	\$0.00	\$0.00	\$3.10	\$1.14
<b>Sports Activity</b>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Tips (Total)</b>	\$1.25	\$0.00	\$2.89	\$1.21
<b>Total</b>	\$1.25	\$0.00	\$6.27	\$2.45

Table 13. Amount spent at additional attractions, by city

The **amount spent on tips** was also gathered (see table 14 below). The averages from all three destinations were \$1.17 in restaurants and \$0.04 for taxis. In Washington the average was \$1.25 in restaurants. In Lancaster no additional tips were reported. In New York the averages were \$2.78 in restaurants and \$0.11 for taxis.

	Washington	Lancaster	New York
<b>Tips in Restaurants</b>	\$1.25	\$0.00	\$2.78
<b>Tips in Taxis</b>	\$0.00	\$0.00	\$0.11

Table 14. Average passenger amounts spent on tips, by city

Passengers were asked to report the **price of their tour package** (see table 15 below). The average price for all three destinations was reported to be \$74.34. The individual averages were \$52.38 for Washington, \$54.02 for Lancaster and \$111.63 for New York.

	Washington	Lancaster	New York
<b>Price averages</b>	\$52.38	\$54.02	\$111.63

Table 15. Average passenger tour package prices, by city

	Washington	Lancaster	New York	Total
<b>Would Return</b>	56 (100%)	177 (87%)	131 (92%)	364 (95%)
<b>Would Not Return</b>	0 (0%)	23 (13%)	11 (8%)	34 (5%)

Table 16. Visitors choosing to return to destination, by city

Passengers were asked if they would **recommend the destination that they visited to their friends and families** (see table 17 below). Of those who visited Washington, all 56 said that they would recommend the city. Of those who visited Lancaster, two passengers reported that they would not recommend Lancaster while 298 said that they would. Ninety-nine percent would recommend Lancaster. Of those who visited New York, 136 reported that they would recommend New York, while six reported that they would not. This is a 96% recommendation rate. Overall 390 said that they would recommend the destination that they visited while eight would not. This is a 98% recommendation rate.

	Washington	Lancaster	New York	Total
<b>Would Recommend</b>	56 (100%)	298 (99%)	136 (96%)	390 (98%)
<b>Would Not Recommend</b>	0 (0%)	2 (1%)	6 (4%)	8 (2%)

Table 17. Visitors who would recommend the destination, by city

## Day Passenger Demographic Information

### *Gender*

(See table 18 below.) Of all day passengers, 245 (62%) were female and 153 (48%) were male. Of those traveling to Washington, 31 (55%) were female and 25 (45%) were male. Of those traveling to Lancaster, 124 (62%) were female and 67 (38%) were male. Of those traveling to New York, 90 (63%) were female and 52 (47%) were male.

	Male	Female
<b>Washington</b>	25 (45%)	31 (55%)
<b>Lancaster</b>	124 (62%)	67 (38%)
<b>New York</b>	90 (63%)	52 (47%)
<b>Total</b>	153 (38%)	245 (62%)

Table 18. Visitor gender by city

### *Age*

(See table 19 below.) Of all day passengers, 30 were under 14, 13 were between 14 and 17, 23 were between 18 and 24, 15 were between 25 and 34, 42 were between 35 and 44, 62 were between 45 and 54, 61 were between 55 and 64, 112 were between 65 and 74 and 40 were older than 74 years old. Of the day travelers to Washington, 28 were under 14 years old, three were between ages 14 to 17, 12 were between 18 and 24, four were between 25 and 34, six were between 35 to 44 and three were between 45 to 54. Of those traveling to Lancaster, two were under 14, seven were between 14 and 17, five were between 18 and 24, three were between 25 and 34, 13 were between 35 and 44, 31 were between 45 and 54, 31 were between 55 and 64, 82 were between 65 and 74 and 26 were older than 74. Of those traveling to New York, three were between 14 and 17, six were between 18 and 24, eight were between 25 and 34, 23 were between 35 and 44, 28 were between 45 and 54, 30 were between 55 and 64 and 30 were older than 74.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>	<b>Total</b>
<b>Under 14</b>	28 (50%)	2 (1%)	0 (0%)	30 (8%)
<b>14 to 17</b>	3 (5%)	7 (4%)	3 (2%)	13 (3%)
<b>18 to 24</b>	12 (22%)	5 (3%)	6 (4%)	23 (6%)
<b>25 to 34</b>	4 (7%)	3 (2%)	8 (6%)	15 (4%)
<b>35 to 44</b>	6 (11%)	13 (6%)	23 (16%)	42 (11%)
<b>45 to 54</b>	3 (5%)	31 (15%)	28 (20%)	62 (16%)
<b>55 to 64</b>	0 (0%)	31 (15%)	30 (21%)	61 (15%)
<b>65 to 74</b>	0 (0%)	82 (41%)	30 (21%)	112 (28%)
<b>75 or older</b>	0 (0%)	26 (13%)	14 (10%)	40 (9%)

Table 19. Visitor age by city

***Marital Status***

(See table 20 below.) Of the combined destinations, 80 (20%) were single, 230 (58%) were married and 88 (22%) were divorced, separated, or widowed. Of those visiting Washington, 44 (79%) were single, 12 (21%) were married and none were divorced. Of those traveling to Lancaster, 17 (9%) were single, 118 (59%) were married and 65 (32%) were divorced. Of the passengers to New York, 19 (13%) were single, 100 (71%) were married and 23 (16%) were divorced, separated, or widowed.

	Washington	Lancaster	New York	Total
<b>Single</b>	44 (79%)	17 (9%)	19 (13%)	80 (20%)
<b>Married</b>	12 (21%)	118 (59%)	100 (71%)	230 (58%)
<b>Divorced/ separated/ widowed</b>	0 (0%)	65 (32%)	23 (16%)	88 (22%)

Table 20. Visitor marital status by city

***Employment***

(See table 21 below.) Of the combined destinations, 2 (0.5%) were executives, 120 (30%) were professionals, 18 (5%) were labor/service workers, 189 (47%) were retired, 65 (16%) were students and 4 (1%) reported having no job. Of the day passengers that visited Washington, 12 (21%) were professionals, 42 (75%) were students and 2 (4%) reported no job. Of those visiting Lancaster, 48 (24%) were professionals, 7 (4%) were labor/service workers, 128 (64%) were retired, 15 (7%) were students and 2 (1%) reported no job. Of those in New York, 2 (1%) were executives, 60 (42%) were professionals, 11 (8%) were labor/service worker, 61 (43%) were retired and 8 (6%) were students.

	Washington	Lancaster	New York	Total
<b>Executive</b>	0 (0%)	0 (0%)	2 (1%)	2 (0.5%)
<b>Professional</b>	12 (21%)	48 (24%)	60 (42%)	120 (30%)
<b>Labor/Service Worker</b>	0 (0%)	7 (4%)	11 (8%)	18 (5%)
<b>Retired</b>	0 (0%)	128 (64%)	61 (43%)	189 (47%)
<b>Student</b>	42 (75%)	15 (7%)	8 (6%)	65 (16%)
<b>None</b>	2 (4%)	2 (1%)	0 (0%)	4 (1%)

Table 21. Visitor work status by city

***Highest Educational Level***

(See table 22 below.) Of all three destinations combined, 38 (10%) reported grade school, 27 (7%) reported some high school, 153 (38%) reported high school, 11 (3%) reported technical school, 60 (32%) reported college or university and 40 (10%) reported master or Ph.D. Of those visiting Washington, 28 (50%) reported grade school, 3 (5%) reported some high school, 15 (27%) reported high school, 4 (7%) reported college or university and 6 (11%) reported master or Ph.D. Of those passengers in Lancaster, 10 (5%) reported grade school, 17 (9%) reported some high school, 82 (41%) reported high school, 7 (3%) reported technical school, 65 (32%) reported college or university and 19 (10%) reported master or Ph.D. Of those who traveled to New York, 7 (10%) reported some high school, 56 (39%) reported high school, 4 (3%) reported technical school, 60 (42%) reported college or university and 15 (11%) reported master or Ph.D.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>	<b>Total</b>
<b>Grade School</b>	28 (50%)	10 (5%)	0 (0%)	38 (10%)
<b>Some High School</b>	3 (5%)	17 (9%)	7 (10%)	27 (7%)
<b>High School</b>	15 (27%)	82 (41%)	56 (39%)	153 (38%)
<b>Technical School</b>	0 (0%)	7 (3%)	4 (3%)	11 (3%)
<b>College or University</b>	4 (7%)	65 (32%)	60 (42%)	129 (32%)
<b>Master or Ph.D.</b>	6 (11%)	19 (10%)	15 (11%)	40 (10%)

Table 22. Visitor education level by city

***Income Level***

(See table 23 below.) Of the combined destinations, 146 (37%) reported less than \$50,000, 47 (12%) reported between \$50,000 and \$74,000, 25 (6%) reported between \$75,000 and \$99,999, 18 (4%) reported between \$100,000 and \$124,999, 1 (0.3%) reported more than \$150,000 and 162 (41%) did not know or refused. Of those visiting Washington, 8 (15%) reported less than \$50,000, 3 (5%) reported between \$50,000 and \$74,000, 3 (5%) reported between \$75,000 and \$99,999, 3 (5%) reported between \$100,000 and \$124,999 and 39 (70%) did not know or refused. Of those that traveled to Lancaster, 99 (49%) reported less than \$50,000, 22 (11%) reported between \$50,000 and \$74,000, 6 (3%) reported between \$75,000 and \$99,999, 9 (5%) reported between \$100,000 and \$124,999 and 64 (32%) did not know or refused. Of those in New York, 39 (27%) reported less than \$50,000, 22 (15%) reported between \$50,000 and \$74,000, 15 (11%) reported between \$75,000 and \$99,999, 6 (4%) reported between \$100,000 and \$124,999, one (1%) reported more than \$150,000 and 59 (42%) did not know or refused.

	Washington	Lancaster	New York	Total
<b>Less than \$50,000</b>	8 (15%)	99 (49%)	39 (27%)	146 (37%)
<b>Between \$50,000 and \$74,999</b>	3 (5 %)	22 (11%)	22 (15%)	47 (12%)
<b>Between \$75, 000 and \$99,999</b>	3 (5%)	6 (3%)	15 (11%)	25 (6%)
<b>Between \$100,000 and \$124,999</b>	3 (5%)	9 (5%)	6 (4%)	18 (4%)
<b>Between \$125,000 and \$149,999</b>	0 (0%)	0 (0%)	0 (0%)	0 (0%)
<b>More than \$150,000</b>	0 (0%)	0 (0%)	1 (1%)	1 (0.3%)
<b>Don't Know/Refused</b>	39 (70%)	64 (32%)	59 (42%)	162 (41%)

Table 23. Visitor income by city

When asked how many people contributed to their household income, the averages were 1.36 from Washington, 1.32 from Lancaster and 1.45 from New York. The average from all three combined was 1.37.

#### *Survey Four: Overnight Passenger Survey*

Visitors staying in their destination overnight completed a separate survey that contained the same basic questions as those asked of day passengers, but solicited additional information regarding hotel spending.

The average number of nights that all overnight passengers stayed in their destination was 3.1. The averages for the individual destinations were 3.6 for Washington, 2.0 for Lancaster and 3.0 for New York.

Passengers were asked **which meals were included in their tour package price** (see table 24 below). The number of people responding that received a meal indicates that they received at least one of that type of meal during their stay. In the combined destinations 378 (75%) reported that breakfast was included, 360 (72%) reported that lunch was included and 435 (86%) reported that dinner was included. In Washington, 221 (91%) passengers reported receiving breakfast, 196 (80%) received lunch and 220 (90%) received dinner. In Lancaster 100 (100%) received breakfast, 100 (100%) passengers received lunch and 100 (100%) passengers received dinner. In New York 57 (36%) received breakfast, 64 (40%) passengers received lunch and 114 (72%) passengers received dinner. No snacks were reported as included for any of the three destinations.

	Washington	Lancaster	New York	Total
<b>Breakfast</b>	221 (91%)	100 (100%)	57 (36%)	378 (75%)
<b>Lunch</b>	196 (80%)	100 (100%)	64 (40%)	360 (72%)
<b>Dinner</b>	220 (90%)	100 (100%)	114 (72%)	435 (86%)
<b>Snacks</b>	0 (0%)	0 (0%)	0 (0%)	0 (0%)

Table 24. Passengers w/ meals included in their tour package price, by city

The **average number of meals included in the three destinations combined** (see table 25 below) was 2.3 breakfasts, 2.4 lunches and 2.1 dinners. In Washington the average was 3.0 breakfasts, 2.8 lunches and 2.7 lunches. The average in Lancaster was 1.0 breakfast, 2.0 lunches and 1.8 dinners. In New York the average was 2.0 breakfasts, 1.8 lunches and 1.0 dinner.

	Washington	Lancaster	New York	Total
<b>Breakfast</b>	3.0	1.0	2.0	2.3
<b>Lunch</b>	2.8	2.0	1.8	2.4
<b>Dinner</b>	2.7	1.8	1.0	2.1
<b>Snacks</b>	0.0	0.0	0.0	0.0

Table 25. Average number of included meals, by city

Of all passengers taking overnight trips 125 (25%) did not receive breakfast, 143 (28%) did not receive lunch, 69 (14%) did not receive dinner and 503 (100%) did not receive snacks. Of those visiting Washington 23 (9%) did not receive breakfast, 48 (20%) did not receive lunch, 24 (10%) did not receive dinner and 244 (100%) did not receive snacks. Of those visiting Lancaster at least one breakfast, lunch and dinner were included but no snacks were included in their package. Of those traveling to New York 102 (64%) did not receive breakfast, 95 (60%) did not receive lunch, 45 (28%) did not receive dinner and 158 (100%) did not receive snacks.

Information on **additional meal spending was also gathered** (see table 26 below). The averages for all three destinations combined were \$3.39 for breakfast, \$5.93 for lunch, \$12.26 for dinner and \$3.74 for snacks. The averages for Washington were \$1.16 for breakfast, \$8.62 for lunch, \$8.10 for dinner and \$3.79 for snacks. The averages for Lancaster were \$0.22 for breakfast, \$0.00 for lunch, \$0.00 for dinner and \$2.27 for snacks. The averages for New York were \$8.91 for breakfast, \$12.53 for lunch, \$26.51 for dinner and \$4.59 for snacks.

	Washington	Lancaster	New York	Total
<b>Breakfast</b>	\$1.16	\$0.22	\$8.91	\$3.39
<b>Lunch</b>	\$8.62	\$0.00	\$12.53	\$5.93
<b>Dinner</b>	\$8.10	\$0.00	\$26.51	\$12.26
<b>Snacks</b>	\$3.79	\$2.27	\$4.59	\$3.74
<b>Total</b>	\$21.67	\$2.49	\$52.54	\$25.32

Table 26. Additional amounts spent by passengers on meals, by city

Questions were also asked about **other spending in the local areas such as groceries and necessities bought at retail outlets, gifts and souvenirs, sports equipment rental and antiques and crafts** (see table 27 below). The averages spent on these categories for all three destinations were \$2.71 in retail outlets, \$27.87 on gifts/souvenirs, \$1.04 on antiques/crafts and \$5.09 on other shopping. The averages for Washington were \$0.23 in retail outlets, \$28.06 on gifts/souvenirs and \$0.16 on antiques/crafts. The averages for Lancaster were \$0.20 in retail outlets, \$19.96 on gifts/souvenirs and \$4.85 on antiques/crafts. The averages for New York were \$2.71 in retail outlets, \$27.87 on gifts/souvenirs, \$1.04 on antiques/crafts and \$5.09 on other shopping.

	Washington	Lancaster	New York	All Destinations
<b>Retail Outlets</b>	\$0.23	\$0.20	\$8.08	\$2.71
<b>Gifts/Souvenirs</b>	\$28.06	\$19.96	\$32.69	\$27.87
<b>Antiques/Crafts</b>	\$0.16	\$4.85	\$0.00	\$1.04
<b>Other Shopping</b>	\$0.00	\$0.00	\$16.10	\$5.09
<b>Total</b>	\$28.45	\$25.01	\$56.87	\$36.71

Table 27. Amount spent on gifts, by city

**Spending on transportation while in the destination** was reported (see table 28 below). Of all overnight passengers an average of \$0.34 was spent on taxis and \$0.34 was spent on the metro. In Washington an average of \$0.64 was reported spent on the metro. In Lancaster no additional transportation was reported. The averages for New York were \$1.05 on taxis and \$0.10 on the metro.

	Washington	Lancaster	New York	Total
<b>Taxi</b>	\$0.00	\$0.00	\$1.05	\$0.34
<b>Metro</b>	\$0.64	\$0.00	\$0.10	\$0.34
<b>Total</b>	\$0.64	\$0.00	\$1.15	\$0.68

Table 28. Amount spent on transportation, by city

Additional **spending on tourist attractions** was reported (see table 29 below). The combined averages were \$1.53 for sightseeing, \$0.86 for attractions, \$0.04 for sports activities and \$5.65 for theatre. In Washington the only additional average spending for tourist activities was \$0.92 for theatre. There was no reported additional spending in Lancaster on tourist activities. The averages for New York were \$4.83 for sightseeing, \$2.72 for attractions, \$0.13 for sports activities and \$16.35 for theatre.

	Washington	Lancaster	New York	All Destinations
<b>Sightseeing</b>	\$0.00	\$0.00	\$4.83	\$1.53
<b>Attractions</b>	\$0.00	\$0.00	\$2.72	\$0.86
<b>Theatre</b>	\$0.92	\$0.00	\$16.35	\$5.64
<b>Sports Activity</b>	\$0.00	\$0.00	\$0.13	\$0.04
<b>Tips (total)</b>	\$3.21	\$0.00	\$11.46	\$5.06
<b>Total</b>	\$4.13	\$0.00	\$35.49	\$13.13

Table 29. Additional amounts spent by passengers on tourist attractions, by city

The **amount spent on tips was also gathered** (see table 30 below). The averages from all three destinations were \$0.18 in hotels, \$4.52 in restaurants, \$0.13 for taxis and \$0.23 on local guides. In Washington the average was \$3.21 in restaurants. In New York the average was \$0.59 for hotels, \$9.27 for restaurants, \$0.42 for taxi, \$0.72 for guides and \$0.46 on other tips. There were no additional tips reported for Lancaster.

	Washington	Lancaster	New York
<b>Tips in Restaurants</b>	\$3.21	\$0.00	\$9.27
<b>Tips in hotels</b>	\$0.00	\$0.00	\$0.59
<b>Tips in taxis</b>	\$0.00	\$0.00	\$0.42
<b>Tips for guides</b>	\$0.00	\$0.00	\$0.72
<b>Other tips</b>	\$0.00	\$0.00	\$0.46

Table 30. Average passenger amounts spent on tips, by city

Passengers were asked to **report the price of their tour package** (see table 31 below). The average price for all three destinations was reported to be \$448.71. The individual averages were \$524.59 for Washington, \$162.94 for Lancaster and \$503.21 for New York.

	Washington	Lancaster	New York
<b>Price averages</b>	\$524.59	\$162.94	\$503.21

Table 31. Average passenger tour package prices, by city

**Occupancy numbers were also reported** (see table 32). The package prices were based on nine single occupancies, 450 double occupancies, 17 triple occupancies and 27 quadruple occupancies. In Washington, there were three single occupancies, 237 double occupancies and four triple occupancies. In Lancaster, there were two single occupancies and 98 doubles. In New York, there were four single occupancies, 115 doubles, 13 triples and 27 quadruple occupancies.

	Washington	Lancaster	New York
<b>Single occupancy</b>	3	2	4
<b>Double occupancy</b>	237	98	115
<b>Triple occupancy</b>	0	0	13
<b>Quadruple occupancy</b>	4	0	27

Table 32. Room occupancy numbers, by city

When asked **if the passengers would like to return to the destination they had visited** (see table 33 below), overall 476 passengers said that they would like to return while 27 said that they would not like to return. This is a 95% return rate. Of the passengers that traveled to Washington, 242 said that they would return while two said that they would not. This is a 99% return rate. Of the passengers visiting Lancaster, 83 reported that they would like to return, while 17 would not. This is an 83% return rate. Of the passengers visiting New York, 151 said that they would return while eight said that they would not return. This is a 95% return rate.

	Washington	Lancaster	New York	Total
<b>Would Return</b>	242 (99%)	83 (83%)	151 (95%)	476 (95%)
<b>Would Not Return</b>	2 (1%)	17 (17%)	8 (5%)	27 (5%)

Table 33. Visitors who would return to destinations, by city

Passengers were asked **if they would recommend the destination that they visited to their friends and families** (see table 34 below). Of those who visited Washington, all 244 said that they would recommend the city. Of those who visited Lancaster, four passengers reported that they would not recommend Lancaster while 96 said that they would. This is a 96% recommendation rate for Lancaster. Of those who visited New York, 156 reported that they would recommend New York while three reported that they would not. This is a 98% recommendation rate. Overall 496 said that they would recommend the destination that they visited while seven would not. This is a 99% recommendation rate.

	Washington	Lancaster	New York	Total
<b>Would Recommend</b>	244 (100%)	96 (96%)	156 (98%)	496 (99%)
<b>Would Not Recommend</b>	0 (0%)	4 (4%)	3 (2%)	7 (1%)

Table 34. Visitors who would recommend destinations, by city

## Overnight Passenger Demographic Information

### *Gender*

(See table 35 below.) Of all the overnight passengers combined, 305 (61%) were females and 198 (39%) were males. Of those traveling to Washington, 156 (64%) were females and 88 (36%) were males. Of those traveling to Lancaster, 50 (50%) were females and 50 (50%) were males. Of those traveling to New York, 99 (62%) were females and 60 (38%) were males.

	Male	Female
<b>Washington</b>	88 (36%)	156(64%)
<b>Lancaster</b>	50 (50%)	50 (50%)
<b>New York</b>	60 (38%)	99 (62%)
<b>Total</b>	198 (39%)	305 (61%)

Table 35. Visitors, by gender and city

### *Age*

(See table 36 below.) Of all the overnight passengers combined, 138 were under 14, 117 were between 14 and 17, 18 were between 18 and 24, 19 were between 25 and 34, 48 were between 35 and 44, 69 were between 45 and 54, 52 were between 55 and 64, 35 were between 65 and 74 and seven were older than 74 years old.

Of those traveling to Washington, 136 were under 14 years old, 50 were between ages 14 to 17, one was between 18 and 24, six were between 25 and 34, 21 were between 35 and 44, 23 were between 45 and 54, five were between 55 and 64, one was between 65 and 74 and one was older than 74. Of those traveling to Lancaster, two were under 14, 61 were between 14 and 17, two were between 18 and 24, one was between 25 and 34, five were between 35 and 44, nine were between 45 and 54, 10 were between 55 and 64, nine were between 65 and 74 and one was older than 74. Of those traveling to New York, six were between 14 and 17, 15 were between 18 and 24, 12 were between 25 and 34, 22 were between 35 and 44, 37 were between 45 and 54, 37 were between 55 and 64, 25 were between 65 and 74 and 30 were older than 74.

	Washington	Lancaster	New York	Total
<b>Under 14</b>	136 (56%)	2 (2%)	0 (0%)	138 (27%)
<b>14 to 17</b>	50 (20%)	61 (61%)	6 (4%)	117 (23%)
<b>18 to 24</b>	1 (0.5%)	2 (2%)	15 (9%)	18 (4%)
<b>25 to 34</b>	6 (0.5%)	1 (1%)	12 (8%)	19 (4%)
<b>35 to 44</b>	21 (9%)	5 (5%)	22 (14%)	48 (10%)
<b>45 to 54</b>	23 (9%)	9 (9%)	37 (23%)	69 (14%)
<b>55 to 64</b>	5 (2%)	10 (10%)	37 (23%)	52 (10%)
<b>65 to 74</b>	1 (0.5%)	9 (9%)	25 (16%)	35 (7%)
<b>75 or older</b>	1 (0.5%)	1 (1%)	5 (3%)	7 (1%)

Table 36. Visitor age, by city

### *Marital Status*

(See table 37 below.) Of the combined destinations, 284 (56%) were single, 166 (33 %) were married and 53 (11%) were divorced, separated, or widowed. Of those visiting Washington, 192 (79%) were single, 40 (16%) were married and 12 (5%) were divorced, separated or widowed. Of those traveling to Lancaster, 64 (64%) were single, 20 (20%) were married and 16 (16%) were divorced, separated, or widowed. Of the passengers to New York, 28 (18%) were single, 107 (67%) were married and 24 (15%) were divorced, separated, or widowed.

	Washington	Lancaster	New York	Total
<b>Single (never married)</b>	192 (79%)	64 (64%)	28 (18%)	284 (56%)
<b>Married</b>	40 (16%)	20 (20%)	107 (67%)	166 (33%)
<b>Divorced/separated/widowed</b>	12 (5%)	16 (16%)	24 (15%)	53 (11%)

Table 37. Visitor marital status, by city

### *Employment*

(See table 38 below.) Of the destinations combined, 0 (0.0%) were executives, 114 (22.7%) were professionals, 22 (4.4%) were labor/service workers, 75 (14.9%) were retired, 273 (54.3%) were students and 4 (0.8%) reported having no job. Of the passengers that visited Washington, 44 (18%) were professionals, 2 (1%) were labor/service workers, 2 (1%) were retired, 189 (77%) were students and 1 (0.5%) reported no job. Of those visiting Lancaster, 15 (15%) were professionals, 21 (21%) were retired and 62 (62%) were students. Of those in New York, 56 (35%) were professionals, 20

(12%) were labor/service worker, 52 (33%) were retired, 22 (14%) were students, 1 (1%) was military and three (2%) reported having no job.

	Washington	Lancaster	New York	Total
<b>Executive</b>	0 (0%)	0 (0%)	0 (0%)	0 (0%)
<b>Professional</b>	44 (18%)	15 (15%)	56 (35%)	114 (22.7%)
<b>Labor/Service Worker</b>	2 (1%)	0 (0%)	20 (12%)	22 (4.4%)
<b>Retired</b>	2 (1%)	21 (21%)	52 (32%)	75 (14.9%)
<b>Student</b>	189 (77%)	62 (62%)	22 (14%)	273 (54.3%)
<b>None</b>	1 (0.5%)	0 (0%)	3 (2%)	4 (0.8%)

Table 38. Visitor employment status, by city

### *Highest Educational Level*

(See table 39 below.) Of the destinations combined 140 (28%) reported grade school, 121 (24%) reported some high school, 98 (20%) reported high school, 13 (3%) reported technical school, 89 (18%) reported college or university and 36 (7%) reported master or Ph.D. Of those visiting Washington, 139 (57%) reported grade school, 49 (20%) reported some high school, 11 (5%) reported high school, 26 (11%) reported college or university and 16 (7%) reported master or Ph.D. Of those passengers in Lancaster, 3 (3%) reported grade school, 63 (63%) reported some high school, 13 (13%) reported high school, 3 (3%) reported technical school, 13 (13%) reported college or university and 5 (5%) reported master or Ph.D. Of those who traveled to New York, 1 (1%) reported grade school, 9 (6%) reported some high school, 74 (47%) reported high school, 10 (6%) reported technical school, 50 (31%) reported college or university and 15 (9%) reported master or Ph.D.

	Washington	Lancaster	New York	Total
<b>Grade School</b>	139 (57%)	3 (3%)	1 (1%)	143 (28%)
<b>Some High School</b>	49 (20%)	63 (63%)	9 (6%)	121 (24%)
<b>High School</b>	11 (5%)	13 (13%)	74 (47%)	98 (20%)
<b>Technical School</b>	0 (0%)	3 (3%)	10 (6%)	13 (3%)
<b>College or University</b>	26 (11%)	13 (13%)	50 (31%)	89(18%)
<b>Master or Ph.D.</b>	16 (7%)	5 (5%)	15 (9%)	36 (7%)

Table 39. Visitor education status, by city

***Income Level***

(See table 40 below.) Of the combined destinations, 238 (47%) reported less than \$50,000, 69 (14%) reported between \$50,000 and \$74,000, 35 (7%) reported between \$75,000 and \$99,999, 16 (3%) reported between \$100,000 and \$124,999, six (1%), 1 (0.2%) reported more than \$150,000 and 138 (27%) did not know or refused.

Of those visiting Washington, 139 (57%) reported less than \$50,000, 17 (7%) reported between \$50,000 and \$74,000, 11 (4%) reported between \$75,000 and \$99,999, 7 (3%) reported between \$100,000 and \$124,999, 4 (2%) reported between \$125,000 and \$149,000 and 66 (27%) did not know or refused. Of those that traveled to Lancaster, 19 (19%) reported less than \$50,000, 13 (13%) reported between \$50,000 and \$74,000, 7 (7%) reported between \$75,000 and \$99,999, 4 (4%) reported between \$100,000 and \$124,999 and 57 (57%) did not know or refused. Of those in New York, 80 (50%) reported less than \$50,000, 39 (24%) reported between \$50,000 and \$74,000, 17 (11%) reported between \$75,000 and \$99,999, 5 (3%) reported between \$100,000 and \$124,999, 2 (2%) reported between \$125,000 and \$149,999, 1 (1%) reported more than \$150,000 and 15 (9%) did not know or refused.

	Washington	Lancaster	New York	Total
<b>Less than \$50,000</b>	139 (57%)	19 (19%)	80 (50%)	238 (47%)
<b>\$50,000 - \$74,999</b>	17 (7 %)	13 (13%)	39 (24%)	69 (14%)
<b>\$75, 000 - \$99,999</b>	11 (4%)	7 (7%)	17 (11%)	35 (7%)
<b>\$100,000 - \$124,999</b>	7 (3%)	4 (4%)	5 (3%)	16 (3%)
<b>\$125,000 - \$149,999</b>	4 (2%)	0 (0%)	2 (2%)	6 (1%)
<b>More than \$150,000</b>	0 ( %)	0 (0%)	1 (1%)	1 (0.2%)
<b>Don't Know/Refused</b>	66 (27%)	57 (57%)	15 (9%)	138 (27%)

Table 40. Visitor income level, by city

When asked how many people contributed to their household income. The averages were 1.2 from Washington, 1.4 from Lancaster and 1.5 from New York. The average from all three combined was 1.4.

**SURVEY FIVE: BUS TERMINAL SURVEY FINDINGS**

The final survey, called the “Bus Terminal Survey” (See Appendix A), was completed by passengers who were traveling independently on **regularly scheduled buses**. Again, this survey was to establish the economic impact of passengers arriving on regularly scheduled buses. Data was collected from passengers waiting in the main bus terminals in Washington, D.C. and in New York City (Port Authority).

A total of 394 surveys were collected from all destinations. In the two individual cities being focused on, 84 surveys were collected in Washington and 108 in New York. The majority of travelers were traveling to Washington, D.C. (84) or to New York (108) with the other passengers traveling to various destinations including Albany, N.Y. (10), Albuquerque, N.M. (2), Atlanta, Ga. (6), Arlington, Va. (2), Baltimore, Md. (15), Becket, Mass. (2), Brooklyn, N.Y. (5), Burlington, Vt. (2), Calhoun, Ga. (4), Canada (2), Chicago, Ill. (4), Cincinnati, Ohio (3), Colo. (1), Del. (2), Elizabeth City, N.Y. (2), Fall River, Mass. (1), Fla. (2), Fredericksburg, Va. (1), Harrisburg, Pa. (1), Harrisonburg, Va. (2), Houston, TX (2), Indianapolis, Ind. (1), In transit (1), JFK Airport (3), Knoxville, Tenn. (1), Lee, Mass. (2), Lexington, Ky. (2), Long Island, N.Y. (2), Manhattan, N.Y. (7), Md. (1), Mass. (4), Memphis, Tenn. (2), Mount Pocono, Pa. (6), N.J. (6), Newark, N.J. (2), Norfolk, Va. (1), Ocean City, Md. (16), Ohio (4), Orlando, Fla. (2), Pa. (2), Philadelphia, Pa. (3), Pittsburgh, Pa. (4), Plattsburgh, N.Y. (4), Queens, N.Y. (5), Raleigh, N.C. (5), Richmond, Va. (4), Roanoke, Va. (1), Shepherdstown, W.Va. (1), Va. (1), Virginia Beach, Va. (5) and Wis. (1).

Passengers were asked about other destinations that they have traveled to and the following were listed: Atlantic City, N.J., Austin, Texas, Bloomsburg, Pa., Boston, Ma., Buffalo, N.Y., Cape Cod, Mass., Cleveland, Ohio, Cincinnati, Ohio, Coeburn, Va., Columbus, Ohio, Dallas, Texas, Ithaca, N.Y., Kansas City, Key West, Fla., Lakeland, Fla., Los Angeles, Calif., Maryland, Meridian, Miss., Miami, Fla., North Carolina, San Francisco, Calif., Seattle, Wash., St. Louis, Mo. and Toronto, Ont.

When asked the **reason for choosing to travel by bus**, 249 (63%) said cost, 84 (21%) said ease of travel and 61 (16%) said it was because they had no reliable personal vehicle. Of those traveling to Washington, 59 (70%) said cost, 11 (13%) said ease of travel and 14 (17%) said it was because they had no reliable personal vehicle. Of those traveling to New York, 52 (48%) said cost, 34 (32%) said ease of travel and 22 (20%) said it was because of no reliable personal vehicle.

The **average number of nights that passengers stayed** at their destination was 9.7 for all passengers, 4.4 for Washington visitors, and 5.5 for New York visitors.

Passengers were asked **how much they spent in the local area** (see table 41 below). The averages for all passengers combined were \$19.29 for food and beverages, \$20.17 for accommodations, \$8.61 for local transportation, \$9.17 on attractions, \$10.37 for theatre, \$3.34 for sports events, \$1.58 for recreation and \$11.31 on other expenditure (gifts, shopping and camping). The averages for those traveling to Washington were \$15.56 for food and beverages, \$12.14 for accommodations, \$5.76 for local transportation, \$2.37 on attractions, \$8.79 for theatre, \$2.14 for sports events, \$2.56 for recreation and \$5.56 on other expenditure (gifts and shopping). The averages for those traveling to New York were \$21.94 for food and beverages, \$30.80 for accommodations, \$13.33 for local transportation, \$17.82 on attractions, \$10.03 for theatre, \$2.50 for sports events, \$2.22 for recreation and \$5.54 on other expenditure (gifts and shopping).

	Washington	New York	Total
<b>Food and Beverages</b>	\$15.56	\$21.94	\$19.29
<b>Accommodations</b>	\$12.14	\$30.80	\$20.17
<b>Local Transportation</b>	\$5.76	\$13.33	\$8.61
<b>Attractions</b>	\$2.37	\$17.82	\$9.17
<b>Theatre</b>	\$8.79	\$10.03	\$10.37
<b>Sports Events</b>	\$2.14	\$2.50	\$3.34
<b>Recreation</b>	\$2.56	\$2.22	\$1.58
<b>Other Expenditure</b>	\$5.54	\$5.56	\$11.31
<b>Tips (total)</b>	\$5.83	\$12.87	\$7.87
<b>Total</b>	\$60.69	\$117.07	\$91.71

Table 41. Passenger amounts spent in local areas, by category and city

The **amount spent on tips was also recorded** (see table 42 below). The averages for all passengers combined were \$5.06 in restaurants, \$2.29 for taxis and \$0.52 for guides. Of those traveling to Washington the averages were \$4.32 in restaurants, \$1.21 for taxis and \$0.30 for guides. Of those traveling to New York the averages were \$6.11 in restaurants, \$6.11 for taxis and \$0.65 for guides.

	Washington	New York
<b>Tips in Restaurants</b>	\$4.32	\$6.11
<b>Tips in taxis</b>	\$1.21	\$6.11
<b>Tips for guides</b>	\$0.30	\$0.65

Table 42. Average passenger amounts spent on tips, by city

Further analysis of just those individuals that reported staying in paid accommodations (not staying with family or friend) showed that the average amount spent on accommodations by passengers to all destinations (171 of 394 or 43.4% of the entire sample) was \$46.47. Of those traveling to Washington, DC (23 of 84 or 27%) the average spent on accommodations was \$44.35. And of those traveling to NY (53 of 108 or 49%) the average spent on accommodations was \$62.76.

Passengers were asked to report which bus company they traveled with. Of all bus passengers 78% traveled Greyhound 9% traveled Peter Pan Lines and 13% rode other buses. Of those visiting Washington 88% traveled with Greyhound, 12% traveled with Peter Pan Lines. Of those visiting New York 62% traveled with Greyhound, 14% traveled with Peter Pan Lines and 24% rode other buses. The bus companies that were listed as “other” were Carl Bieber, Bonanza, Delta, Martz, Susquehanna, Trailways and Trans-Bridge.

The passengers were asked **why they chose the particular bus companies that they did** (see table 43 below). Passengers were allowed to choose more than one reason. Of all passengers, 19 said movies offered, 34 said comfort, 225 said cost and 71 said they were satisfied with previous use. Of those traveling to Washington one said movies, four said comfort, 64 said cost and seven said they were satisfied with previous use. Of those visiting New York four said movies, 15 said comfort, 57 said cost and 18 said that they were satisfied with previous use. Other reasons given were location (5%), route (1%) and that it was their only choice (9%).

	Washington	New York	Total
<b>Movies</b>	1	4	19
<b>Comfort</b>	4	15	34
<b>Cost</b>	64	57	225
<b>Previous Use</b>	7	18	71

Table 43. Number of passengers choosing particular bus companies, by reason by city

The **frequency of travel by bus outside of the passenger's home city was also reported** (see table 44 below). All combined, 11% reported very often, 17% fairly often, 25% sometimes, 32% almost never and 15% first time. Of those visiting Washington, 4% reported very often, 7% fairly often, 14% sometimes, 54% almost never and 20% reported that it was their first time. Of those visiting New York, 14% reported very often, 27% fairly often, 27% sometimes, 20% almost never and 12% reported that it was their first time.

	Washington	New York	Total
<b>Very Often</b>	4%	14%	11%
<b>Fairly Often</b>	7%	27%	17%
<b>Sometimes</b>	14%	27%	25%
<b>Almost Never</b>	54%	20%	32%
<b>First Time</b>	20%	12%	15%

Table 44. Frequency of travel by bus (outside passenger's home city), by city

The average price of bus tickets was also gathered. The averages were \$67.14 for all passengers, \$62.45 to Washington and \$60.30 to New York.

Of all passengers 35% had one-way tickets and 65% had round-trip tickets. Individually, Washington had 14% one-way and 86% round-trip and New York had 42% one-way and 58% round-trip.

## Bus Terminal Passenger Demographic Information

### *Gender*

(See table 45 below.) Of all passenger 42% were female and 58% were male. Of just those traveling to Washington 30% were female and 70% were males. Of those visiting New York 45% were female and 55% were male.

	Washington	New York	Total
<b>Male</b>	70%	55%	58%
<b>Female</b>	30%	45%	42%

Table 45. Passengers gender, by city

### *Age*

(See table 46 below.) Of all passengers 2% were 14 to 17, 45% were 18 to 24, 20% were 25 to 34, 14% were 35 to 44, 11% were 45 to 54, 7% were 55 to 64, 1% was 65 to 74 and 1% was 75 or older. Of only Washington passengers 53% were 18 to 24, 11% were 25 to 34, 11% were 35 to 44, 16% were 45 to 54, 5% were 55 to 64 and 4% was 65 to 74. Of those visiting New York 6% were 14 to 17, 34% were 18 to 24, 21% were 25 to 34, 19% were 35 to 44, 8% were 45 to 54, 9% were 55 to 64 and 3% was 65 to 74.

	Washington	New York	Total
<b>Under 14</b>	0%	0%	0%
<b>14 to 17</b>	0%	6%	2%
<b>18 to 24</b>	53%	34%	45%
<b>25 to 34</b>	11%	21%	20%
<b>35 to 44</b>	11%	19%	14%
<b>45 to 54</b>	16%	8%	11%
<b>55 to 64</b>	5%	9%	7%
<b>65 to 74</b>	4%	3%	1%
<b>75 and Older</b>	0%	0%	1%

Table 46. Passenger age, by city

### *Employment*

(See table 47 below.) Of all passengers 7% were executive, 32% were professionals, 12% were labor/service workers, 6% were military, 6% were retired, 36% were students and 1% reported no job. Of those traveling to Washington 8% were executive, 25% were professionals, 6% were labor/service workers, 21% were military, 9% were retired, 27% were students and 2% reported no job. Of those traveling to New York 8% were

executive, 37% were professionals, 15% were labor/service workers, 1% was military, 6% were retired and 33% were students.

	Washington	New York	Total
<b>Executive</b>	8%	8%	7%
<b>Professional</b>	25%	36%	32%
<b>Labor/Service Worker</b>	6%	15%	12%
<b>Military</b>	21%	2%	6%
<b>Retired</b>	9%	6%	6%
<b>Student</b>	27%	33%	36%
<b>No Job</b>	2%	0%	1%

Table 47. Passenger employment status, by city

### *Highest Educational Level*

(See table 48 below.) When asked their level of education 4% of all passengers reported grade school, 4% reported some high school, 38% high school, 5% reported technical school, 17% reported college or university and 8% reported master or Ph.D. Of those traveling to Washington reported high school, 5% reported technical school, 17% reported college or university and 8% reported master or Ph.D. Of those traveling to New York 6% reported grade school, 6% reported some high school, 19% reported high school, 12% reported technical school, 45% reported college or university and 11% reported master or Ph.D.

	Washington	New York	Total
<b>Grade School</b>	0%	6%	4%
<b>Some High School</b>	0%	6%	4%
<b>High School</b>	70%	19%	38%
<b>Technical School</b>	5%	12%	11%
<b>College/University</b>	17%	45%	34%
<b>Master or Ph.D.</b>	8%	11%	9%

Table 48. Passenger education level, by city

### *Income Level*

(See table 49 below.) Of all bus passengers 54% reported less than \$50,00, 16% reported between \$50,00 and \$74,999, 10% reported between \$75,000 and \$99,999, 3% reported between \$100,000 and \$124,999, 1% reported between \$125,000 and \$149,999, 2% reported more than \$150,000 and 14% either did not know or refused. Of those passenger traveling to Washington 64% reported less than \$50,00, 13% reported between \$50,00 and \$74,999,

7% reported between \$75,000 and \$99,999, 3% reported between \$100,000 and \$124,999 and 14% either did not know or refused. Of just those passengers traveling to New York 51% reported less than \$50,00, 16% reported between \$50,00 and \$74,999, 15% reported between \$75,000 and \$99,999, 4% reported between \$100,000 and \$124,999, 3% reported more than \$150,000 and 11% either did not know or refused.

	Washington	New York	Total
<b>Less Than \$50,000</b>	64%	51%	54%
<b>Between \$50,000 and \$74,999</b>	13%	16%	16%
<b>Between \$75,000 and \$99,999</b>	7%	15%	10%
<b>Between \$100,000 and \$124,999</b>	3%	4%	3%
<b>Between \$125,000 and \$149,999</b>	0%	0%	1%
<b>More Than \$150,000</b>	0%	3%	2%
<b>Don't Know/Refused</b>	13%	11%	14%

Table 49. Passenger income level, by city

When asked how many people contributed to the household income, passengers to all destinations reported 69% one contributor, 25% two contributors, 3% three contributors and 3% for or more contributors. Of just those visiting Washington 88% reported one, 8% reported two and 4% reported three. Of those traveling to New York, 71% reported one, 20% reported two, 3% reported three and 6% reported four or more.

## ECONOMIC IMPACT ANALYSIS

### Summary of Findings by Trip Type and Destination

The following tables summarize, by destination, the findings presented earlier in this report.

#### A. Average Package Price

	Washington	Lancaster	New York
<b>Day Trip</b>	\$58.80	\$64.17	\$81.38
<b>One Night Trip</b>	\$179.00	\$171.00	\$316.00
<b>Two Night Trip</b>	\$334.60	\$337.00	\$579.00
<b>Three Night Trip</b>	N/A	N/A	\$900.00

Table 50. Average per passenger cost for bus tour, for all three destinations

*B. Percent Remaining in Local Area*

Washington	Lancaster	New York
63.9%	62.1%	47.1%

Table 51. Percent of package price that remains in local area, by city

*C. Number of Passengers Per Bus*

	Washington	Lancaster	New York
<b>Day Trip</b>	39.1	45.7	45
<b>Over Night Trip</b>	45.4	38.1	38.4

Table 52. Average number of passengers per bus, by city

*D. Additional Amount Spent Per Passenger<sup>\*3</sup>*

	Washington	Lancaster	New York
<b>Day Trip</b>	\$27.28	\$13.00	\$63.07
<b>One Night Trip</b>	\$54.89	\$27.50	\$146.05

Table 53. Total additional spent per bus tour passenger, by city

**Overall Impact of Various Bus Trip Types on the Destinations Surveyed**

By taking the figures summarized above and applying them to a simple formula, the overall impact of various types of bus visitors to the three destinations studied can be calculated (Table 54).

<p><i>Economic Impact Per Bus = A x B x C + (D x C)</i></p> <p><b>A</b> = average package price</p> <p><b>B</b> = percent remaining in local area</p> <p><b>C</b> = number of passengers per bus</p> <p><b>D</b> = additional amount spent per passenger</p>
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<sup>3</sup> The total number of bus tours to Washington, Lancaster and New York City was not measured for this study. Additional data must be provided by individual destinations.

	<b>Washington</b>	<b>Lancaster</b>	<b>New York</b>
<b>Day Trip</b>	$\$58.80 \times 63.9\% \times 39.1 +$ $(\$27.28 \times 39.1) =$ <b>\\$2,535.77</b>	$\$64.17 \times 62.1\% \times 45.7 +$ $(\$13 \times 45.7) =$ <b>\\$2,415.23</b>	$\$81.38 \times 47.1\% \times 45 +$ $(\$63.07 \times 45) =$ <b>\\$4,563.00</b>
<b>One Night Trip</b>	$\$179.00 \times 63.9\% \times 45.4 +$ $(54.89 \times 45.4) =$ <b>\\$7,684.90</b>	$\$171.00 \times 62.1\% \times 38.1 +$ $(27.50 \times 38.1) =$ <b>\\$5,093.63</b>	$\$316.00 \times 47.1\% \times 38.4 +$ $(146.05 \times 38.4) =$ <b>\\$11,264.10</b>
<b>Two Night Trip</b>	$\$334.60 \times 63.9\% \times 45.4 +$ $(54.89 \times 45.4) =$ <b>\\$12,198.95</b>	$\$337.00 \times 62.1\% \times 38.1 +$ $(27.50 \times 38.1) =$ <b>\\$9,021.20</b>	$\$579.00 \times 47.1\% \times 38.4 +$ $(146.05 \times 38.4) =$ <b>\\$16,080.35</b>
<b>Three Night Trip</b>	N/A	N/A	$\$900.00 \times 47.1\% \times 38.4 +$ $(146.05 \times 38.4) =$ <b>\\$21,886.08</b>

Table 54. Per bus economic impact cost calculations, by city

By combining the aggregate data from all three destinations, Table 55 provides an average per-bus revenue figure by each trip type.

<b>Average impact per bus tour, for all three destinations</b>	
<b>Day Trip</b>	\$3,171.33
<b>One Night Trip</b>	\$8,014.21
<b>Two Night Trip</b>	\$12,433.50
<b>Three Night Trip</b>	N/A

Table 55. Average economic impact per bus tour, for all three destinations

### **Impact of Passengers on Regularly Scheduled Bus Service**

Based upon the data collected in the Washington and New York City bus terminals, passengers traveling on regularly scheduled buses spend on average \$91.71 in their destination city. Those passengers traveling specifically to Washington reported spending \$60.69 and those traveling to New York City reported a total spending of \$117.07.

<b>Bus Terminal Passenger</b>	
<b>Washington</b>	\$60.69
<b>New York</b>	\$117.07
<b>All Destinations</b>	\$91.71

Table 56. Economic impact per passenger on regular scheduled bus service, by city

An area therefore can estimate the economic impact of regularly scheduled bus passengers by multiplying the number of bus passengers arriving in their destination by one of the figures above most representative of their destination.

## **ANALYSIS**

Based on the figures reported by bus companies and tour passengers, there is little doubt that the economic impact of bus travel is significant, and that charter and tour bus passengers experience a high level of satisfaction with both individual tour components and the destinations visited. The local businesses studied proved well aware of the economic importance of bus visits to their own business, in terms of both the revenues taken in from bus groups and their relative share of overall business.

By applying the survey data to a mathematical formula that takes into account these new findings (average package price, the percent that remains in the local area, the number of passengers per bus, and the additional amount spent per passenger), the total economic impact of a bus visit can be estimated for each of the three destinations studied.

To use the formulas, local data will still be required. Specifically, local businesses that serve travelers must be surveyed to determine how many overall bus visits they receive on either a weekly, monthly, quarterly or other relevant seasonal basis. Because obtaining specific revenue data traditionally has been the biggest barrier to bus impact data collection in the past, destination marketing organizations may find their data collection burden substantially eased by the formulas in this report.

Next, it will be necessary to determine the average trip duration to the local destination. Annual bus visit data from local lodging businesses can be compared to annual bus visit data from the destination's major local attraction(s) to roughly determine the overall percentage of local bus visits that remain overnight. An inquiry should be made to local lodging businesses as to what rough percentage of motorcoach groups stay for more than one night, as this figure varies most from place to place based on the nature and number of nearby attractions that support it as a motorcoach tour "hub." A general U.S. and Canadian finding has been that 72 percent of bus visits are day trips and 28 percent of bus visits are by groups staying one night or more.<sup>4</sup>

Motorcoach operators can utilize this data to support their efforts for enhanced bus amenities such as access and parking and more informed oversight at the local level. In addition, destinations can use this data to help shape their own marketing efforts and determine the appropriate level of attention and investment to dedicate to bus tour operators and the group travel segment.

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<sup>4</sup> Breakout of day trips versus overnights is based on an October 1996 survey of 33 million U.S. and Canadian motorcoach travelers by Longwoods International, sponsored by the American Bus Association.

## Estimating Economic Impact on Other Destinations

While every destination has its own unique mix of attractions and hospitality offerings, the new data yielded by these formulas offers a starting point for other destinations to estimate their own local stake in the motorcoach tourism market.

To aide in this analysis and planning, the full report offers a formula for calculating the economic impact of bus tours on the three survey sites. Destinations interested in applying these formulas locally should consider which of the three study sites most closely matches their area and use the data provided for that city:

1. **Historical/Cultural Destinations:** Destinations with a number of national monuments, museums, and places of historical interest should use the following formula, based on the study's **Washington D.C.** findings, to determine the economic impact of bus tours on their specific destination:

# of day-trip buses per year x \$2,536	\$ _____
# of one-night bus tours per year x \$7,685	\$ _____
# of two-night bus tours per year x \$12,199	\$ _____

Add these three figures to estimate the total economic impact of motorcoach visits to this type of destination.

2. **Rural/ Ethnic Heritage Destinations:** Destinations in a more rural setting, with outlet shopping, local food and flavor, and an emphasis on cultural heritage and ethnic tourism should use the following formula, based on the study's **Lancaster, Pa.** findings, to determine the economic impact of bus tours on their specific destination:

# of day trip buses per year x \$2,415	\$ _____
# of one-night bus tours per year x \$5,094	\$ _____
# of two-night bus tours per year x \$9,021	\$ _____

Add these three figures to estimate the total economic impact of motorcoach visits to this type of destination.

3. **Major Cosmopolitan Destinations:** Destinations in or close to a major city, dense with restaurants and lots of entertainment and shopping should use the following formula, based on the study's **New York City** findings, to determine the economic impact of bus tours on their specific destination:

# of day trip buses per year x \$4,563	\$ _____
# of one-night bus tours per year x \$11,264	\$ _____
# of two-night bus tours per year x \$16,080	\$ _____

Add these three figures to estimate the total economic impact of motorcoach visits to this type of destination.

## **CONCLUSION**

No two tourism destinations are the same. The characteristics of local geography, regional populations, attractions, weather, accessibility, history and cultural relevance make it difficult to precisely assign dollar values and estimate impacts to the diverse motorcoach tourism that may be experienced in various locales.

The formulas offered in this summary are intended to outline helpful rules of thumb that take into account the many types of expenditures that bus visitors make. Still, the precise ranges of expenditures catalogued through the implementation of these surveys speak for themselves: at a minimum, bus groups spend readily and are relied upon considerably by local businesses that serve travelers. The survey findings demonstrate that motorcoach groups comprise a dynamic and powerful economic force that should be considered when formulating public policy, transportation and overall city planning. Destination marketers can now engage in more informed planning and budgeting in order to both attract motorcoach groups, and serve them successfully, so that tour operators will be encouraged to return, ultimately as partners in their success.