

Pennsylvania's Annual Traveler Profile 2011 Travel Year

December 2012

Table of Contents



| | <u>Page</u> |
|--|-------------|
| Introduction..... | 4 |
| Research Method..... | 5 |
| Executive Summary | 8 |
| Size & Structure of the U.S. Travel Market..... | 26 |
| Size & Structure of Pennsylvania’s Travel Market | 32 |
| Pennsylvania Marketable Overnight Trips..... | 45 |
| Origin Markets | 46 |
| Traveler Profile | 56 |
| Trip Planning & Booking | 68 |
| Trip Characteristics | 89 |
| Trip Experiences | 98 |
| Activities by Origin Market of Traveller..... | 104 |
| Activities by Absence/Presence of Children in Household..... | 110 |

Table of Contents (cont'd)



| | <u>Page</u> |
|--|-------------|
| Overnight Marketable Trips (cont'd) | |
| Regional Attractions Visited..... | 112 |
| Importance of Factors In Choice of Pennsylvania Tourism Region | 137 |
| Product Delivery | 160 |
| Trip Benefits | 181 |
| Pennsylvania Marketable Day-Trips..... | 184 |
| Origin Markets..... | 185 |
| Traveller Profile | 188 |
| Trip Planning & Booking | 199 |
| Trip Characteristics | 218 |
| Trip Experiences | 223 |
| Trip Benefits | 228 |

Introduction



Travel and tourism is an important industry for the commonwealth of Pennsylvania. The state hosted an estimated 181.7 million visitors (as measured in person-trips) in 2011, 62% of whom were residents of other states. The state's ability to attract travelers from outside the state's boundaries is directly linked with the amount of money travelers spend in the state and the state and local tax revenues generated from visitor spending since travelers from out-of-state are more likely to stay overnight in paid lodging and spend more than in-state travelers.

The focus of this report is on "marketable" travelers, which are defined as travelers destination for purely leisure purposes (i.e., non-business) and whose stay can be influenced by marketing (i.e., travel to a destination for purposes other than to visit friends and family).

Pennsylvania ranked 7th among the states in 2011 with a 3.5% market share of US overnight marketable travelers and 3rd in the share (6.4%) of US marketable day-trip travelers. The state's rankings and market shares of marketable travelers were both down compared to 2010.

Research Methodology



The research for this report was conducted by Longwoods International.

The results consist of:

- *Estimates of the domestic volume of overnight travel on a nationwide level.*
- *Estimates of the volume of overnight and day travel to Pennsylvania and its tourism regions.*
- *Characteristics and profile of overnight and day trips to the state and the individual tourism regions.*

The results are based on results from the Travel USA® annual survey of US travelers. Each quarter, a random cross-section of approximately 1 million panel members is sent an e-mail invitation to participate in the survey, or over 5 million annually.

For the 2011 travel year, this yielded: 207,014 trips for analysis nationally – 138,771 overnight trips and 68,243 day trips.

Research Methodology (cont'd)



- ⦿ The **Travel USA**[®] program identified 5,790 survey respondents who visited Pennsylvania on an overnight trip and 4,530 on a day-trip in 2011.
- ⦿ A follow-up survey was sent to a representative sample of these visitors to augment the information from **Travel USA**[®], providing more in-depth information on visitor spending and visitor activity, as well as strategic data on trip characteristics, planning and booking, and visitor impressions of Pennsylvania's tourism product.
- ⦿ There were 1,883 total responses for the overnight segment and 990 total responses for the day-trip segment from this return sample.
- ⦿ Estimates of Pennsylvania's overnight and day-trip volume were based on a number of sources, including **Travel USA**[®], the customized return-to-sample research, and consultations with Tourism Economics.

Research Methodology (cont'd)



- Estimates of Pennsylvania's overnight and day-trip travel volume are based on a number of sources including Travel USA®, the custom return-to-sample research discussed above, historic data from previous research conducted for the Pennsylvania Tourism Office, and consultations with Tourism Economics, the contractor responsible for Pennsylvania's annual economic impact of travel and tourism estimates.

Executive Summary



PENNSYLVANIA VISITOR VOLUME

Pennsylvania hosted 181.7 million travelers in 2011 (as measured in “person-trips”), a 1.4% increase from 2010.

- More than one-third (64.2 million) of travelers included an overnight stay, up 3.7% from 2010 – slightly above the 3.4% increase for the US, with the trip types presented below shifting a bit from 2011 away from marketable leisure travel.
 - Visiting friends/relatives (VFR) was by far the top reason for an overnight stay in PA in 2011, accounting for 51% of the overnight total, which was well above the US average of 44% (unchanged from 2010).
 - Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second leading category with a 35% share of PA’s overnight travel market, or an estimated 22 million travelers – both down from 2010.
 - Business and Business-Leisure trips accounted for 12% and 2%, respectively, of PA’s 2010 overnight total.

Executive Summary (cont'd)



PENNSYLVANIA DAY-TRIP VISITOR VOLUME

- Pennsylvania hosted an estimated 117.5 million day-trip travelers in 2011, accounting for slightly less than two-thirds of the state total, and essentially unchanged from 2010.
 - Marketable trips accounted for 56% of PA's day-trip travel, or an estimated 61 million travelers, a proportion well above the US average of 52% and the state average for overnight travel (35%) .
 - Visiting friends/relatives (VFR) was the second leading reason for a PA day-trip in 2011, accounting for 34% of the day-trip total – slightly below the 36% US average and well below the state average (51%) for overnight travel.
 - Business trips and Business-Leisure accounted for 8% and 2%, respectively, of PA's 2011 day-trip total.
 - The relative distribution of PA's overnight trip types was little unchanged from 2010.

Executive Summary (cont'd)



PENNSYLVANIA'S MARKET SHARE – Overnight Trips

- Pennsylvania ranked 5th among the states in total overnight leisure travel with a 4.0% market share in 2011, behind California, Florida, Texas, and New York.
- Pennsylvania's ranking slipped to 7th in terms of marketable overnight travelers in 2011, with a 3.5% market share behind Florida, California, Nevada, New York, Texas, and New Jersey – compared to ranking 6th and a 3.8% market share in 2010.
- Visiting Friends/Relatives (VFR) accounted for 51% of the travelers who took an overnight leisure trip in Pennsylvania in 2011 – a far higher average than the 44% average for the US. Pennsylvania ranked 5th among the states for US overnight VFR travel in 2011 with a 4.6% market share.
- Pennsylvania remained the 7th leading destination state for US overnight business travel behind California, Texas, Florida, Illinois, New York, and Georgia with a 3.7% market share in 2011.

Executive Summary (cont'd)



PENNSYLVANIA'S MARKET SHARE – Day-Trips

- Pennsylvania continued to 3rd among the states for total US day-trip leisure travel behind California and Florida in 2011, with the 6.2% market share marking a slight decline from 2010.
- Pennsylvania's ranking dipped to 3rd behind California and Florida for marketable day-trip leisure travelers in 2011, with the 6.5% market share down slightly from 2010.
- Pennsylvania's day-trip leisure travelers were far less likely to visit friends/relatives (VFR) than overnight travelers, ranking 5th among the states for US day-trip VFR travel and a 5.8% market share in 2011.
- Pennsylvania was the 5th leading destination state for US day-trip business travel in 2011 with a 5.0% market share, behind California, Texas, Florida, and New York – down from 4th and a 5.3% market share in 2010.

Executive Summary (cont'd)



ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Ohio, Maryland, and Virginia were among the leading origin markets for Pennsylvania's marketable overnight and day-trip travelers in 2011, together accounting for 83% and 91%, respectively, of the total.
- Pennsylvania was the top origin market for PA's leisure travelers accounting for 38% of marketable overnight travelers; 49% of marketable day-trip travelers; 34% of overnight VFR travelers; and 52% of the state's day-trip VFR travelers.
- Pennsylvania was also the top origin market for PA business overnight travelers, accounting for 33% of the state total, with New York, New Jersey, and Maryland, together accounting for an additional 20%.
- New York was an important origin market for business travelers who combined some leisure travel with their business trip, accounting for 15% of PA's overnight business-leisure travel segment – second only to PA business travelers (22%).

Executive Summary (cont'd)



PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region had the highest total overnight visitation numbers of the state's 11 tourism regions, with 14.7 million person-trips in 2011, followed by Pittsburgh and Its Countryside and Dutch Country Roads regions.
- These three regions accounted for nearly half of Pennsylvania's total overnight person-trips in 2011.
- The Dutch Country Roads region was the state's leading region for marketable overnight leisure trips, followed by the Pocono Mountains and Philadelphia and the Countryside regions.
- With their relatively large population bases, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions were the leading destinations for the state's business and VFR (visiting friends and relatives) travel.

Executive Summary (cont'd)



Why Pennsylvania?

Nearly two-thirds (62%) of Pennsylvania's overnight marketable visitors traveled to/within the state because they had visited before and wanted to see more.

Living nearby was the second most popular reason for those in the overnight marketable segment to visit Pennsylvania in 2011 – cited by 15% of survey respondents, an 8 percentage point decrease from 2010 indicating the recession was no longer having a large affect on discretionary leisure travel.

A recommendation from friends or relatives was responsible for 13% of the state's overnight marketable visitors in 2011. When viewed together with the large percentage of travelers who had visited Pennsylvania before and wanted to see more, the importance of cultivating a positive image and experience for travelers cannot be overstated.

Advertising influenced 7% of marketable overnight travelers' decision to visit Pennsylvania, a 5 percentage point increase from 2010.

Executive Summary (cont'd)



Planning and Booking by Marketable Overnight Travelers

The planning cycle for many of today's time-pressed travel consumers is relatively short, with 33% of Pennsylvania's marketable overnight travelers planning their trip in a month or less and 24% within two months. Less than one-fifth (i.e., 19%) of travelers planned their Pennsylvania trip 6 months or more in advance in 2011.

The internet remained the single, most important planning source – used by 43% of Pennsylvania's marketable overnight travelers in 2011, with personal experience a distant second relied on by 19% of travelers.

Over half of Pennsylvania's marketable overnight travelers used the internet to research and plan their accommodations (51%), while roughly a third relied on the internet for maps and directions (32%) and to find out about local attractions and activities (26%), and for information on restaurants (14%) in 2011.

In terms of the technology used, over half used a desktop computer (51%) to plan their trip. Only 8% used a smartphone to plan their trip, but usage soared to 31% during the trip.

Executive Summary (cont'd)



Use of Social Media by Pennsylvania's Marketable Overnight Travelers

A little more than 50% of Pennsylvania's marketable overnight leisure travelers used social media in some capacity surrounding their trip(s) in 2011.

Reading online travel reviews (16%) was the most heavily used social media tool, followed by posting travel photos and/or videos online (16%) and viewing photos and/or videos online posted by other travelers (12%).

Not surprisingly, travelers in the younger age groups were far more likely to use social media before, during, and after their trips than older travelers, with almost two-thirds of travelers 18 - 34 years of age using travel-related social media compared to less than 40% of travelers aged 55 - 64.

There was with one notable exception. Older travelers were more likely to read travel reviews online (approximately 20% of travelers aged 35-54) than younger travelers (15%).

Executive Summary (cont'd)



Trip Experiences

Shopping, scenic drives, and visiting historical houses/museums remained the top three trip experiences of Pennsylvania's marketable overnight travelers in 2011.

With the exception of non-outlet shopping, participation rates for most types of trip experiences by Pennsylvania's marketable overnight travelers were little changed from 2010, with non-outlet shopping down 4 percentage points.

The participation rates for Pennsylvania's marketable day-trip travelers were generally below those of the overnight segment in 2011.

Executive Summary (cont'd)



Trip Characteristics

Pennsylvania is largely a “drive-to” destination, with 93% of the state’s marketable overnight travelers from out of state arriving by car, van, truck, or RV in 2011.

Short stays were the norm for the majority of marketable overnight travelers in 2010, with nearly two-thirds (64%) staying just one or two nights on their Pennsylvania trip in 2010 – a far higher percentage than the 55% US average.

Pennsylvania’s marketable overnight travelers largely preferred to stay in hotels or motels (67%), with 11% opting for a rented campground. Both percentages were 2 percentage points above the US average.

Two-thirds of the state’s marketable overnight visitors traveled with a spouse or partner, while more than a third (38%) had children along on their trip.

Executive Summary (cont'd)



Traveler Priorities and Expectations

Travelers have certain priorities and expectations when choosing to visit a destination.

For Pennsylvania's marketable overnight leisure travelers, their top 10 priorities for a travel destination in 2011 were (in descending order): exciting, worry free, adult atmosphere, family friendly, climate, unique, affordable, luxurious, the entertainment, and sports and recreation.

Pennsylvania scored extremely well on each of these priorities, with the proportion of travelers agreeing that their Pennsylvania trip experience largely met each of the priorities.

Not surprisingly, Pennsylvania's resident travelers viewed the state more favorably on each of the priorities than non-resident travelers who visited the state.

Executive Summary (cont'd)



Benefits from a Pennsylvania Overnight or Day Trip

It is well documented that taking a leisure trip purely for fun offers a number of benefits to travelers' overall health and well-being.

As in 2010, the benefits for Pennsylvania's marketable overnight and day-trip leisure travelers largely reflect a break from people's day-to-day responsibilities and stress and providing a time to focus on others who are significant to them.

The top five trip benefits cited by Pennsylvania's 2011 marketable overnight and day-trip travelers were: relaxed/relieved stress, a break from the day-to-day routine, no fixed schedule, an opportunity to create lasting memories, and enrich relationships.

Executive Summary (cont'd)



DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

As in prior years, Pennsylvania's 2011 marketable overnight travelers were generally higher income, well-educated, married adults with no children living at home.

- Pennsylvania's marketable overnight travelers had a median age of 44.9 years, matching the US average, and below the median age of the state's marketable day-trip travelers (47.4 years).
- The majority were married or with a partner (73%) – slightly above the US average of 70% and that of marketable day-trip travelers (69%).
- A small majority (56%) also had no children under 18 years of age living at home – a proportion well below that of the state's marketable day-trip travelers (63%).
- The median household income of the state's marketable overnight travelers was \$72,710, with roughly a quarter (27%) with an annual household income of at least \$100,000. The median household income of the state's marketable day-trip travelers was lower than the state's overnight travel segment at \$66,860.

Executive Summary (cont'd)



DEMOGRAPHIC CHARACTERISTICS BY AGE OF TRAVELER

The averages noted on the previous slide mask key differences based on age.

- Pennsylvania's marketable overnight travelers under the age of 45 were more likely to hold at least an associate's degree than those 45 years of age or older, i.e., 67% vs 58%, respectively.
- The proportion of travelers with children under 18 years of age differed markedly based on the age of the traveler:

| <u>Traveler's Age</u> | <u>Percent With Children Under Age 18</u> |
|-----------------------|---|
| 25-34 | 45% |
| 35-44 | 51% |
| 45-54 | 75% |
| 55-64 | 6% |

Executive Summary (cont'd)



HOUSEHOLD INCOME BY AGE

Income also shows a differentiation based on age.

- Not surprisingly, older travelers had the highest incomes – both on average and as a percentage of travelers with an annual household income over \$100,000.
- Travelers in the 45-54 age demographic had the highest median annual household income at \$88,630 in 2011, compared to \$59,830 for those age 25-34.
- Travelers aged 45 or above accounted for nearly 60% of Pennsylvania's marketable overnight travelers with an annual household income of \$100,000 or more.
- In contrast, travelers below age 45 represented nearly 60% of the state's marketable overnight travelers with incomes below \$50,000.
- The median income of travelers 45 years of age or older was \$80,500 compared to \$64,700 for travelers under age 45.

Executive Summary (cont'd)



Marital Status by Age

Younger travelers were far more likely to be single than older travelers.

- Pennsylvania's marketable overnight travelers in the youngest age group (18-24) were overwhelmingly single (78%).
- There was a distinct shift to married (47%) or with partner (15%) for the 25-34 age group, but with roughly a third still reporting as single.
- The vast majority of the state's marketable overnight travelers in the 45-54 and 55-64 age ranges were married/living with a partner (~80% for each group).
- The vast majority (85%) of travelers in the 65+ age group were married or living with a partner – the highest proportion of any age group.

Detailed Findings

Size & Structure of US Overnight Travel Market

Size and Structure of the US Domestic Travel Market



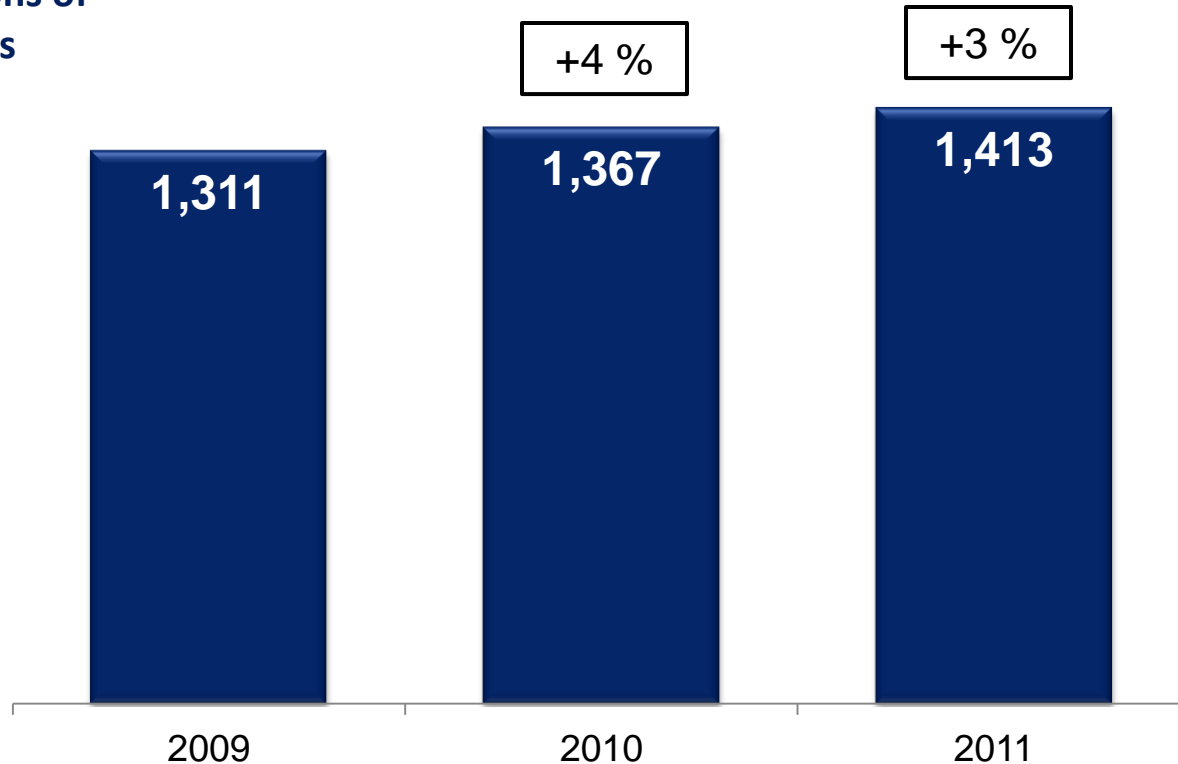
- Overnight travel by Americans increased by 3% in 2011 vs. 2010.
- Of the almost 1.4 billion trips taken, 80% were adults and 88% were taken for leisure purposes.
- Approximately half of the leisure trips were for the purpose of visiting friends and relatives, approximately 4% were business leisure trips and about 40% were of a trip type that can be influenced by marketing.
- The top six marketable trip types were special event travel, touring trips, outdoor trips, casino trips, resort trips and city trips.

Size of the US Overnight Travel Market 2009 to 2011



Base: Total Overnight Trips

In millions of
Trips

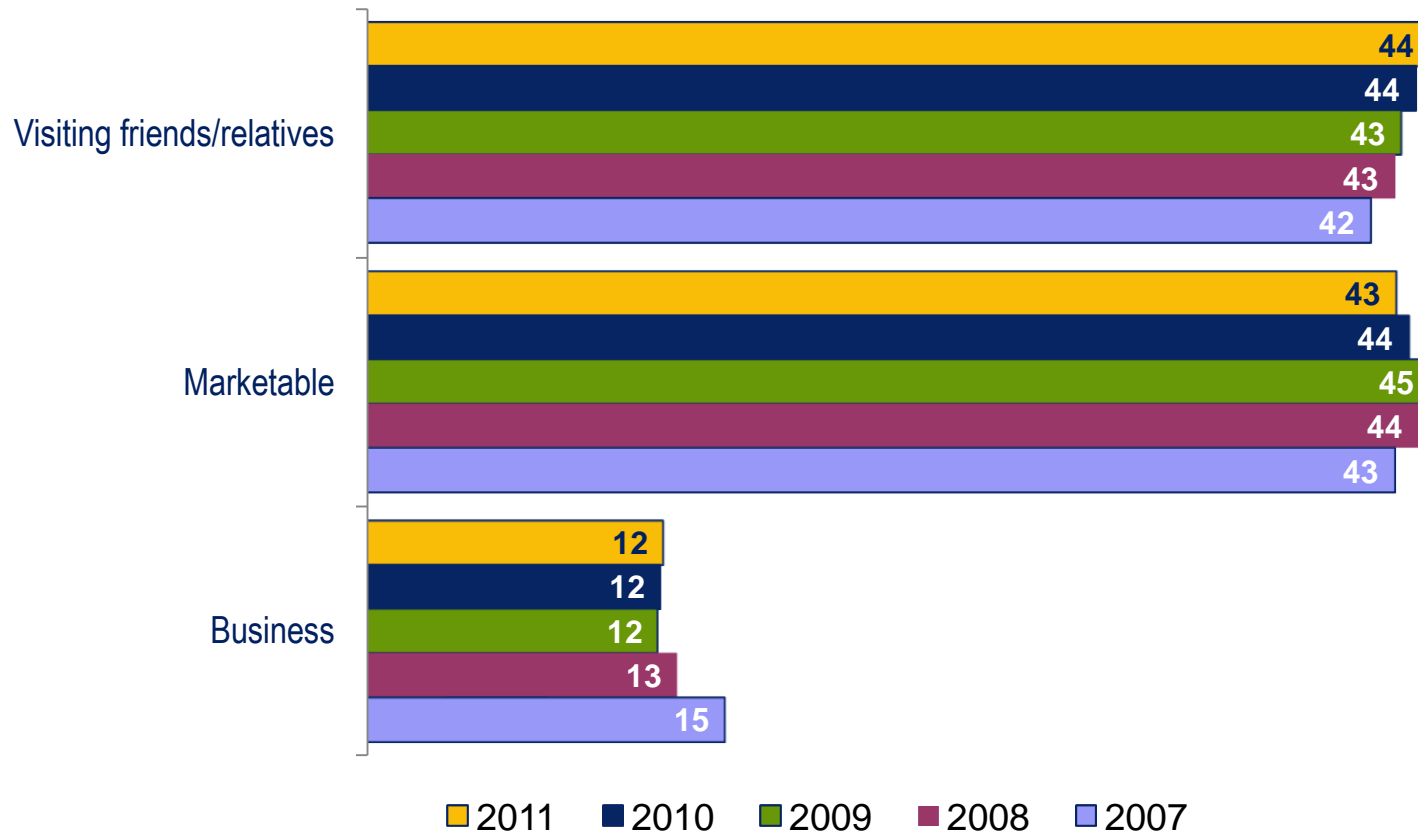


Structure of the US Overnight Travel Market – Trends



Base: Overnight Trips

Percent of Total

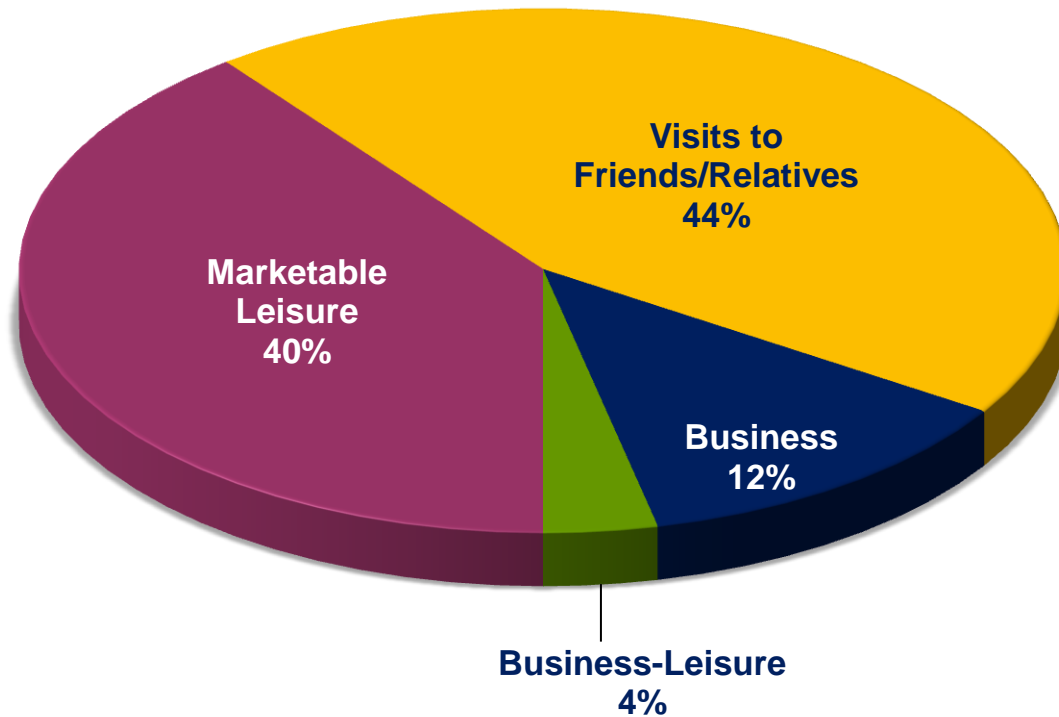


Business-Leisure trips are included in Marketable trips in this slide

US Overnight Market Segments



Base: Adult Overnight Trips

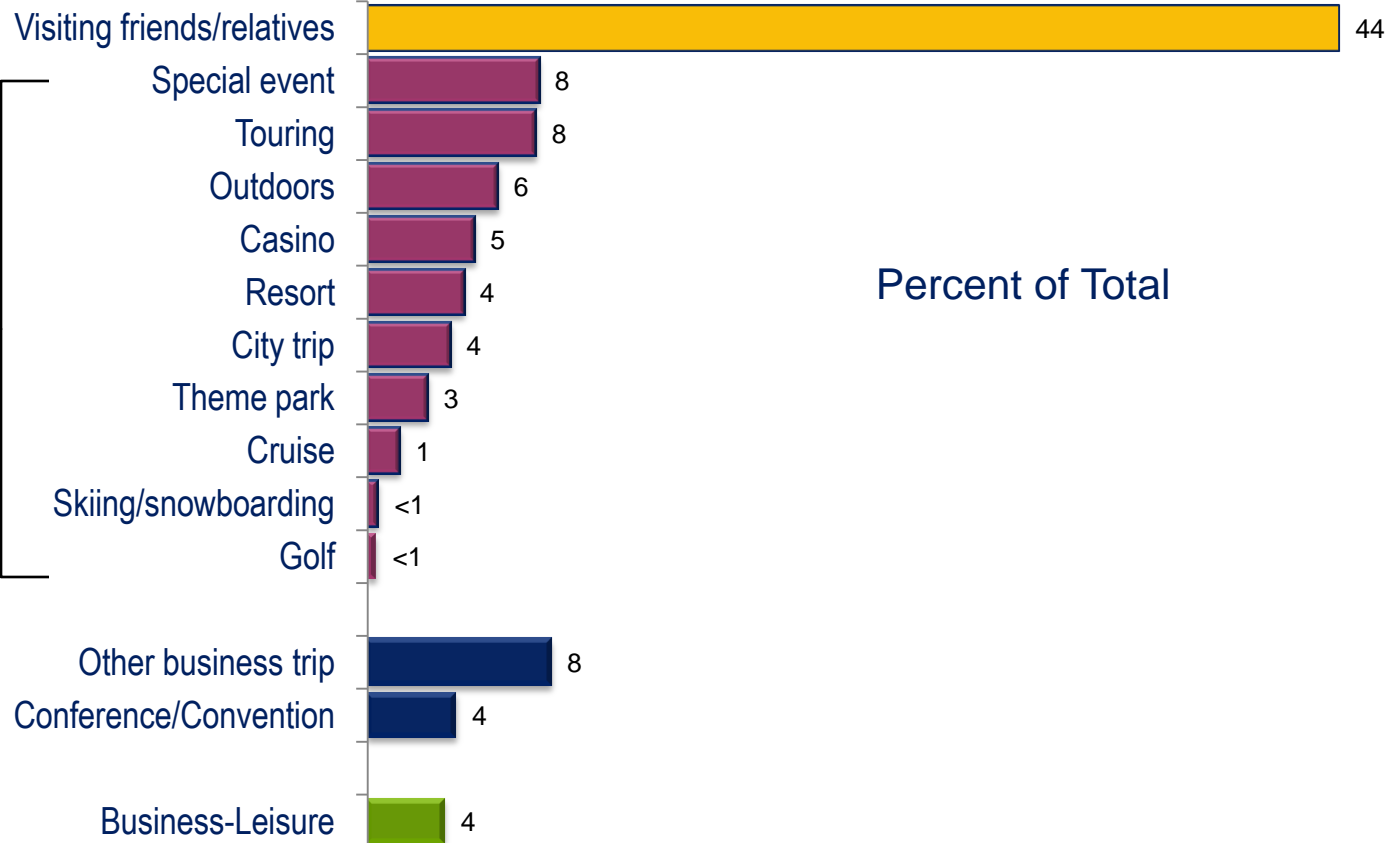


Main Purpose of US Overnight Trips in 2011



Base: Adult Overnight Trips

**Marketable
Trips**



Size & Structure of Pennsylvania's Travel Market

Pennsylvania's Travel Market



- We estimate that 181.7 million trips were taken to and in Pennsylvania by Americans in 2011:
35% were overnight trips and 65% were day trips
- Of the 64.2 million overnight trips:
 - *35% were marketable trip types (somewhat less than the national norms).*
 - *Marketable trip types are trips that can be influenced by marketing, or, in other words, leisure trips excluding visits to friends and relatives.*
- Key marketable trip types for Pennsylvania included special events, touring and outdoors.

Pennsylvania Day Travelers

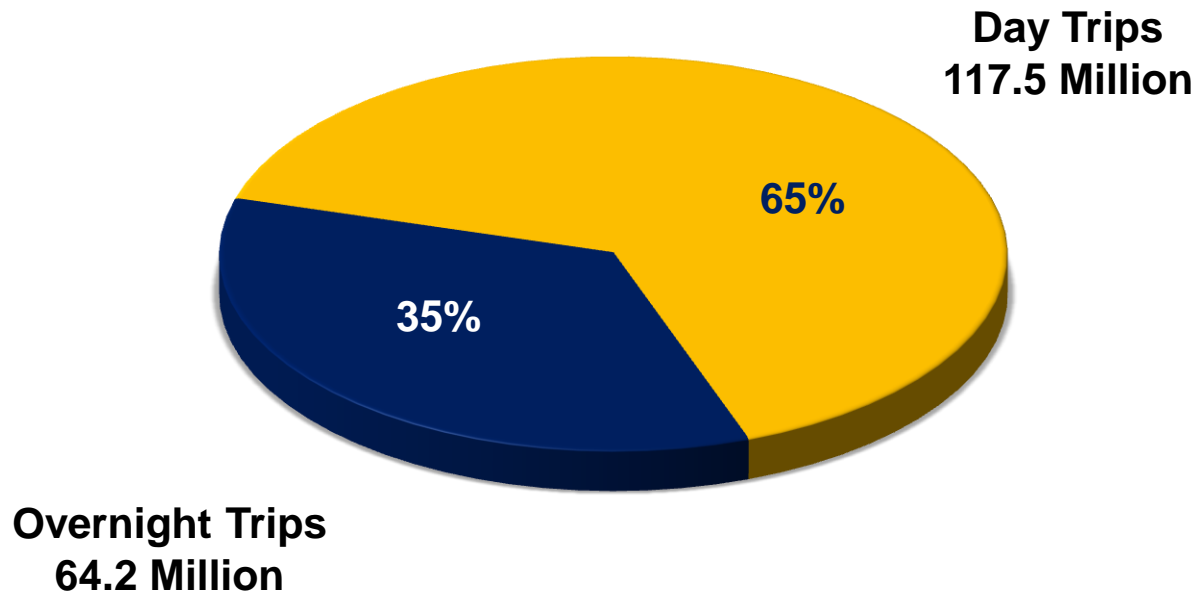


- Of the estimated 117.5 million day travelers to and in Pennsylvania :
56% were marketable trip types (a much higher percentage than we saw in overnight travel).
- Key marketable day trip types included special events, shopping, and touring.

Total Trips to Pennsylvania in 2011



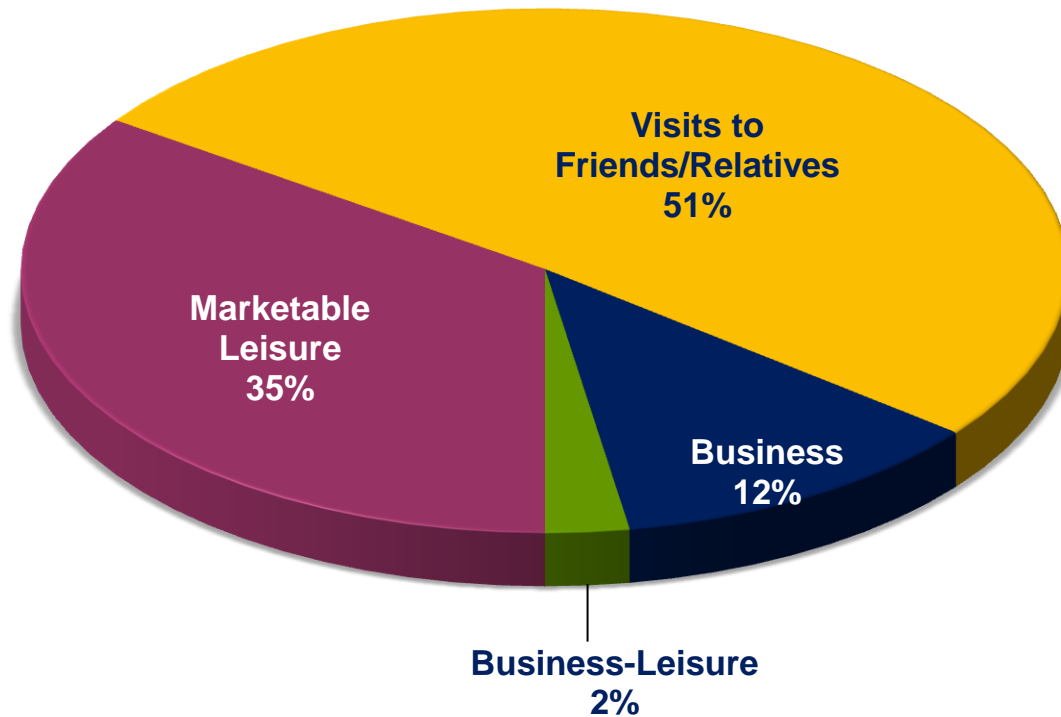
Total Person-Trips = 181.7 Million



Pennsylvania's Overnight Trip Market Segments



Base: Adult Overnight Trips to Pennsylvania

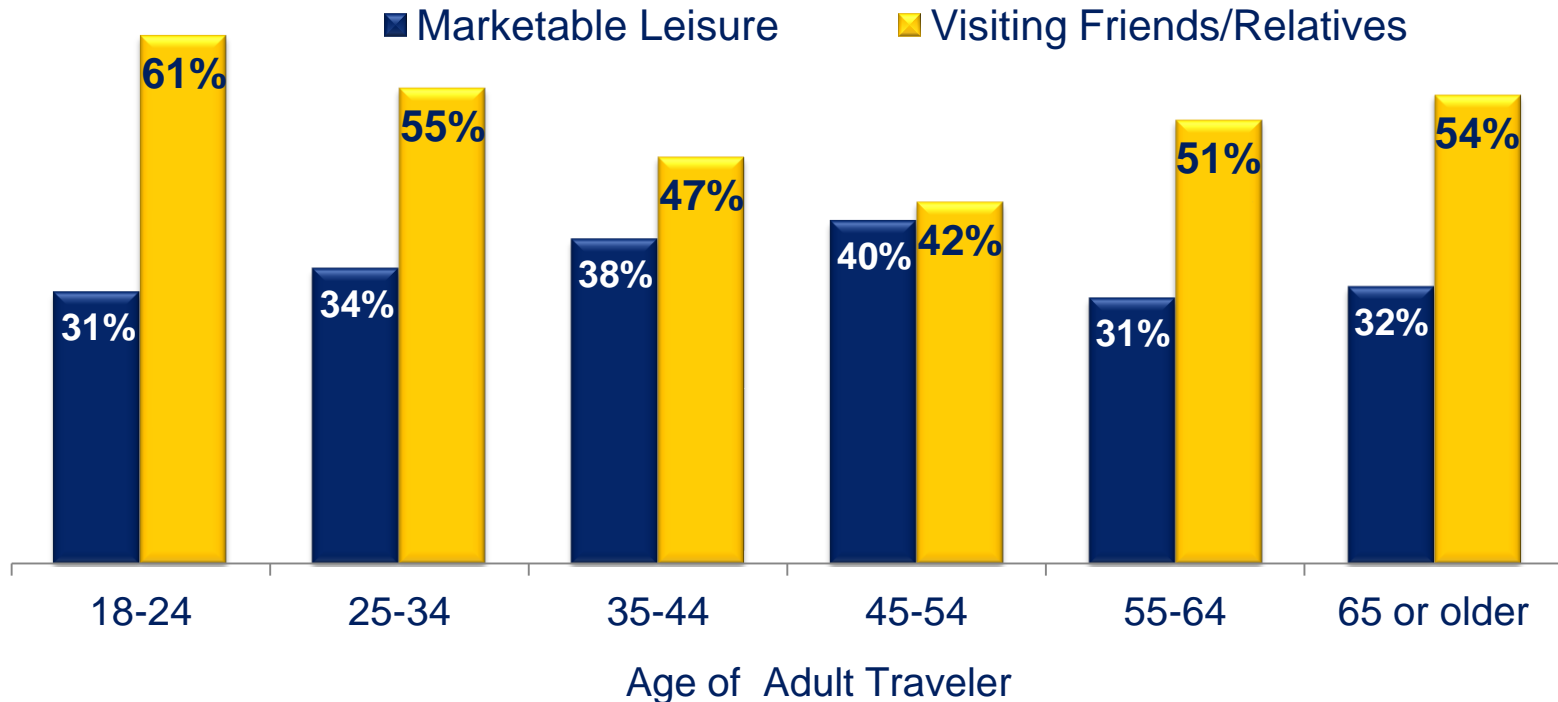


Pennsylvania's Leisure Overnight Travelers Purpose of Stay by Age of Adult Traveler



Base: Adult Overnight Trips to Pennsylvania

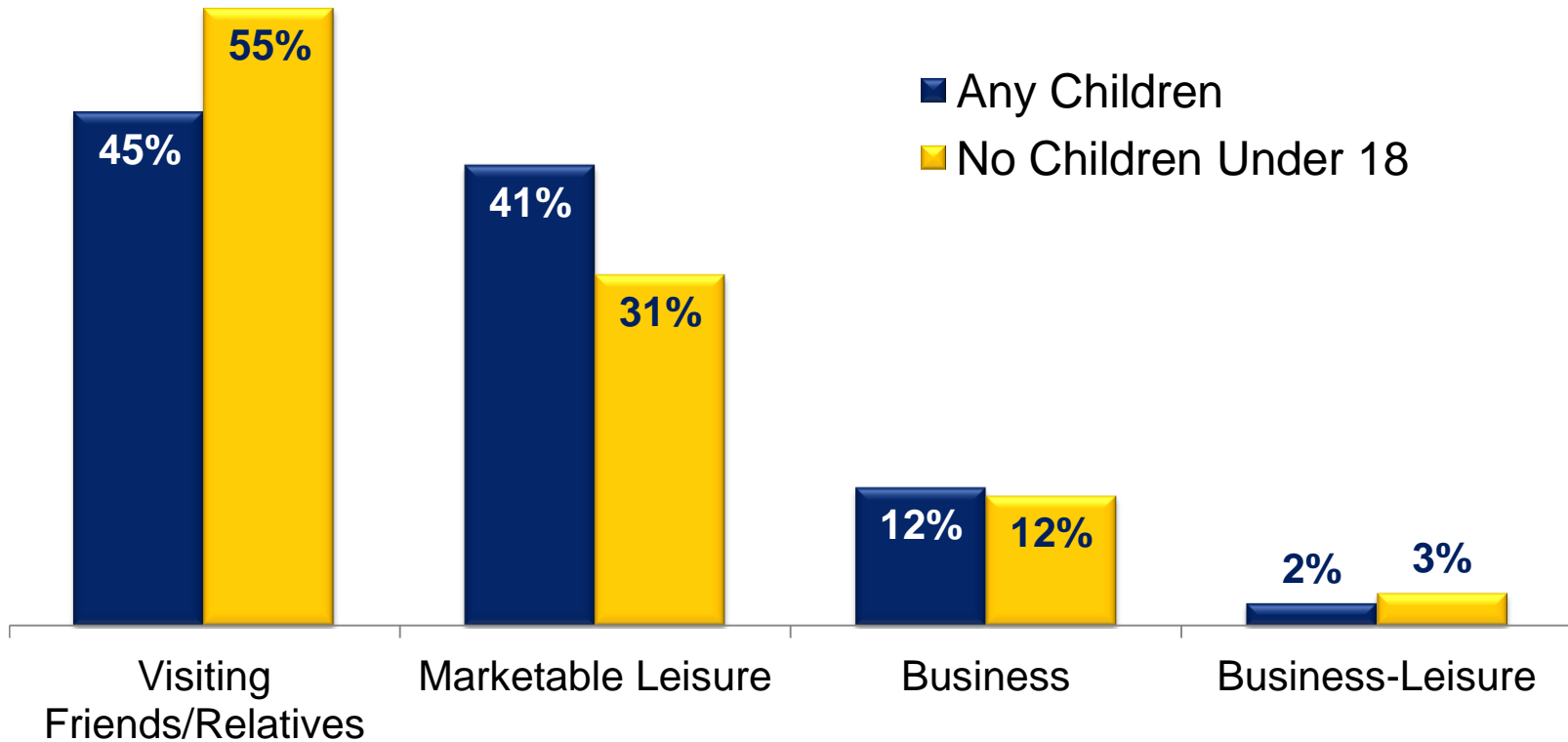
Travelers in the 35-54 age cohorts are more likely to travel for marketable leisure purposes, younger and older travelers are far more likely to visit friends/family.



Pennsylvania's Overnight Trip Market Segments by Presence of Children in Household



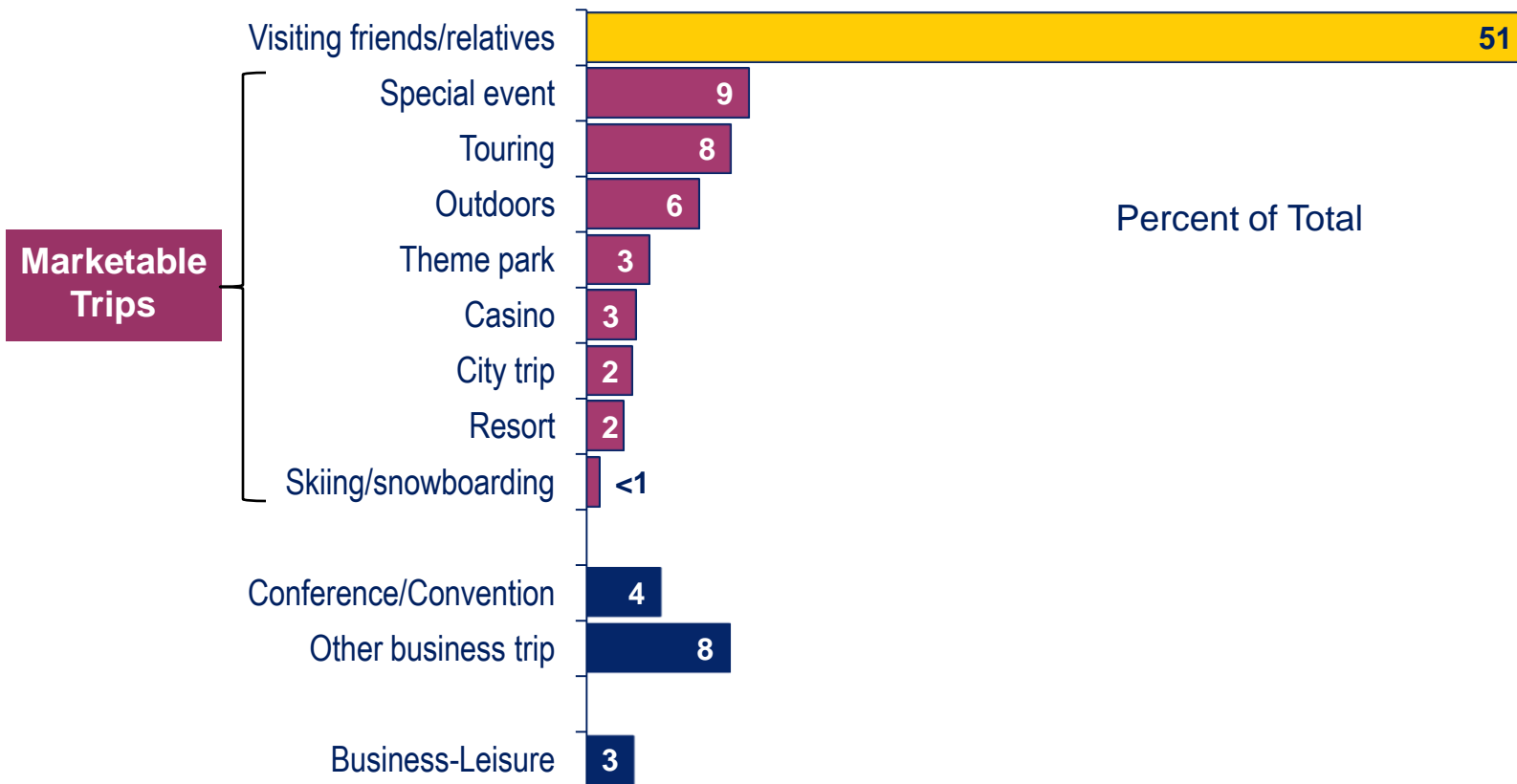
Base: Adult Overnight Trips to Pennsylvania



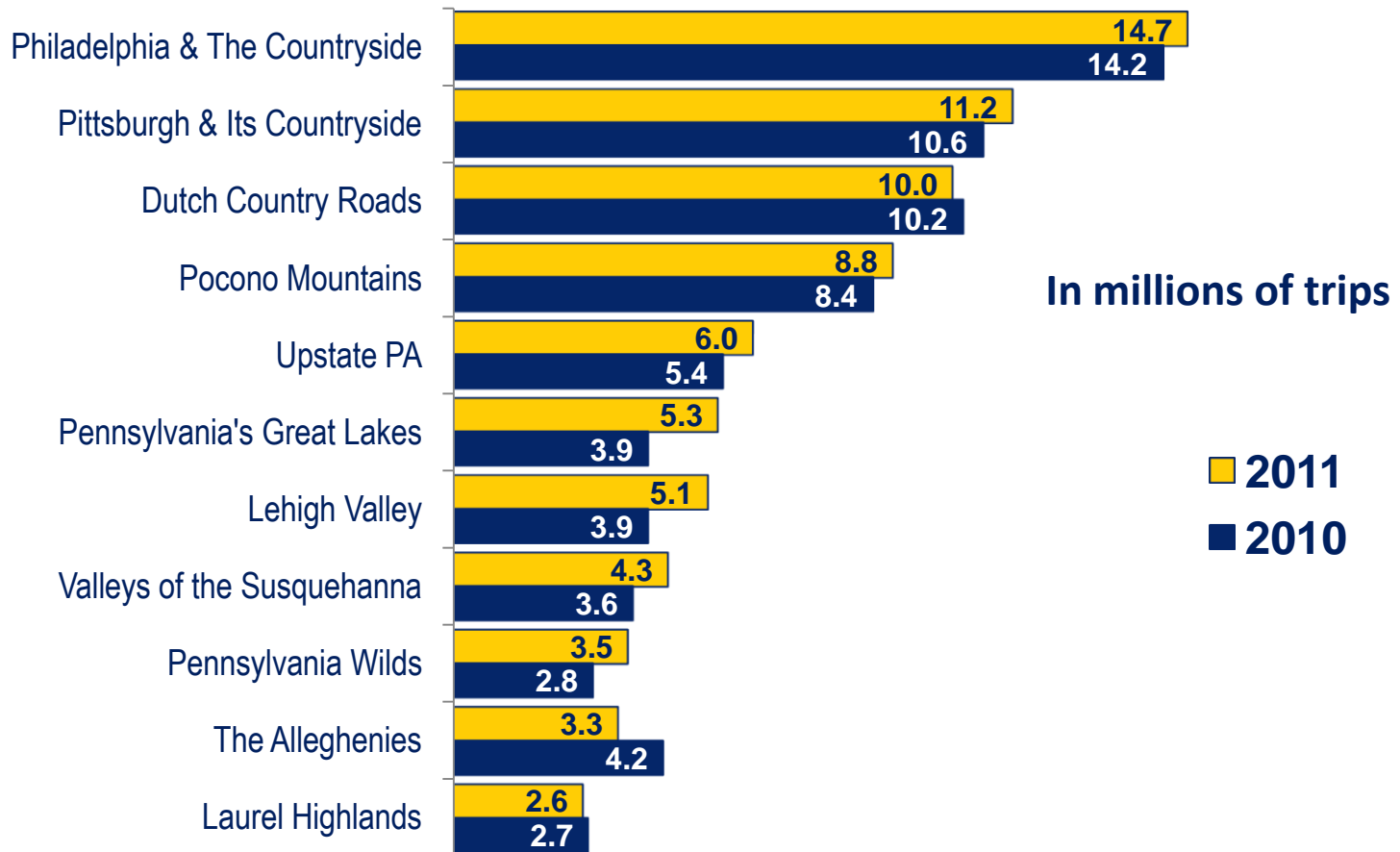
Main Purpose of Overnight Trips to Pennsylvania in 2011



Base: Adult Overnight Trips



Estimated Number of Overnight Travelers By Regions Visited*



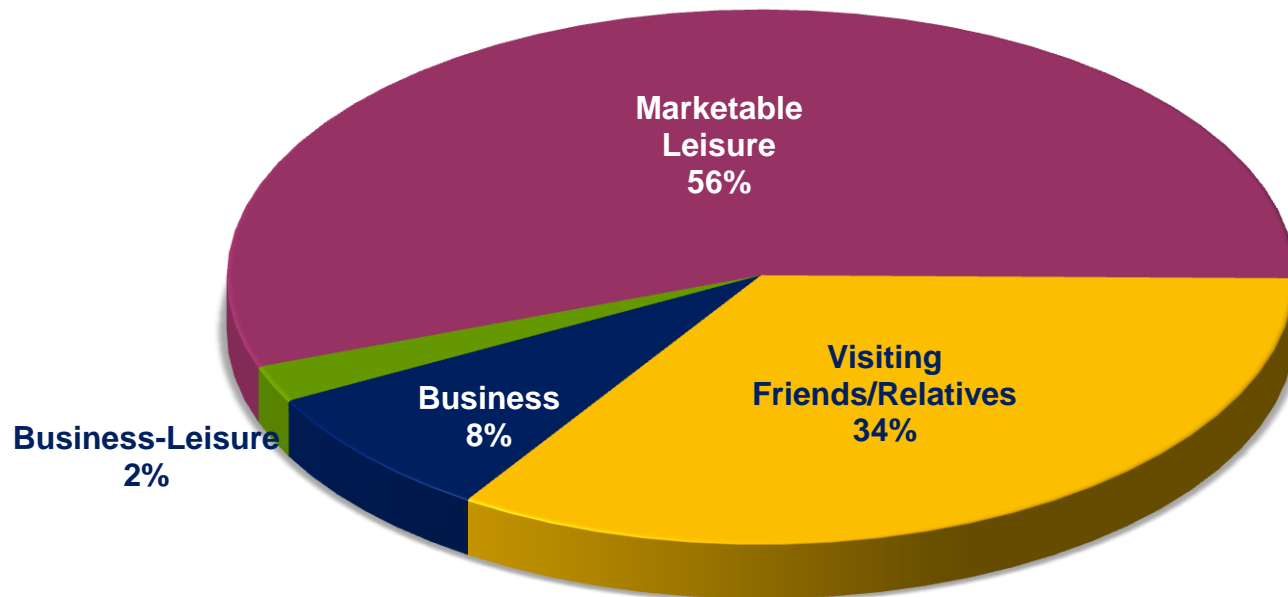
*Spent time in region

Total will add to more than State total as a number of travelers visited more than one region.

Pennsylvania's Day-Trip Market Segments



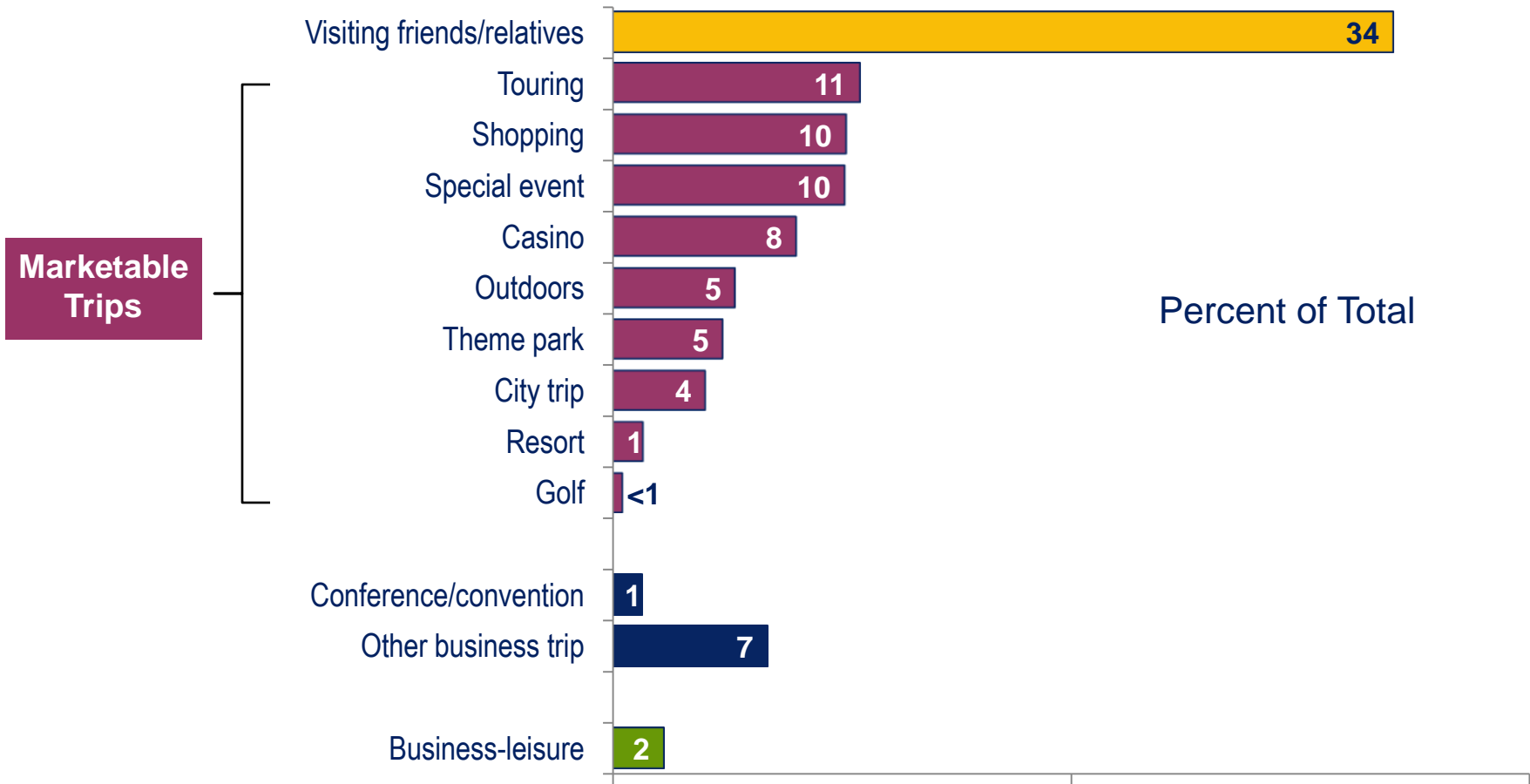
Base: Adult Day Trips to Pennsylvania



Main Purpose of Pennsylvania 2011 Day-Trips



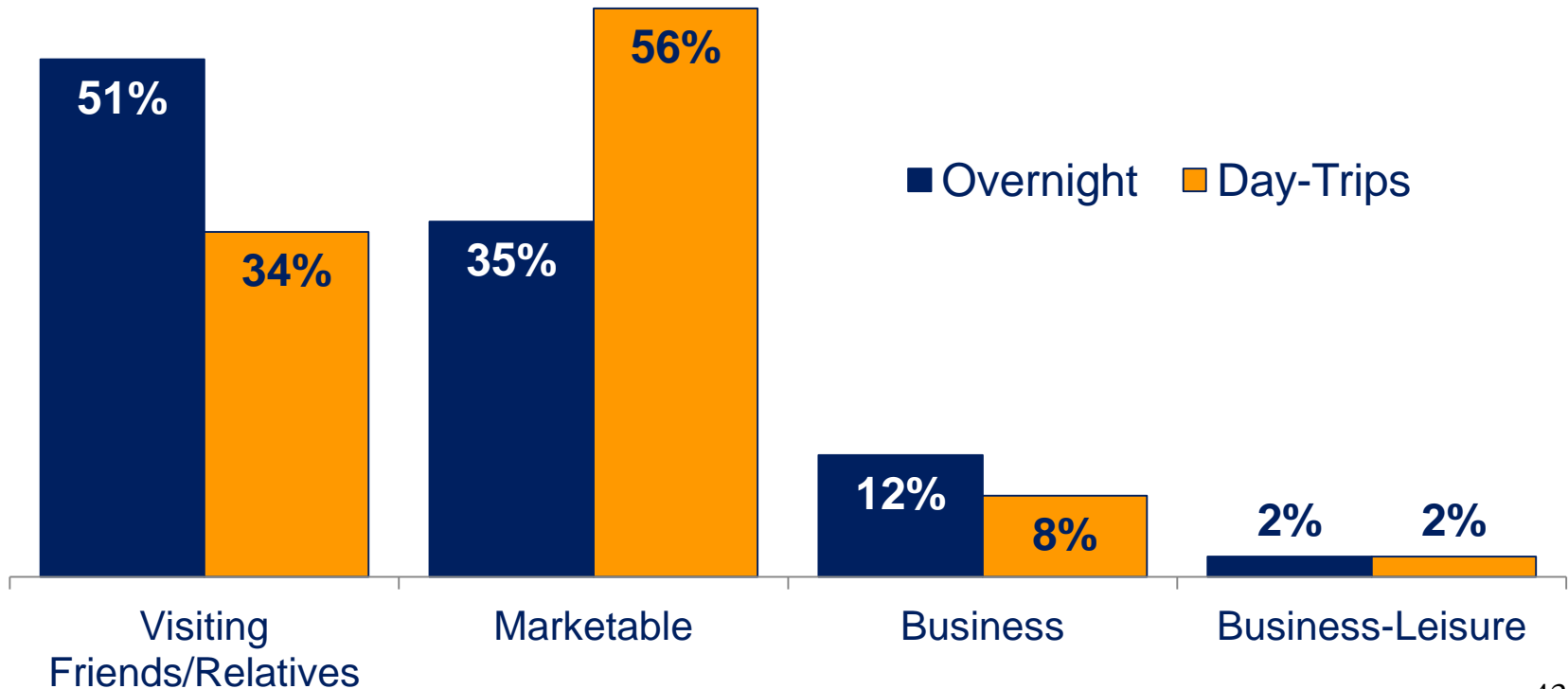
Base: Adult Day Trips



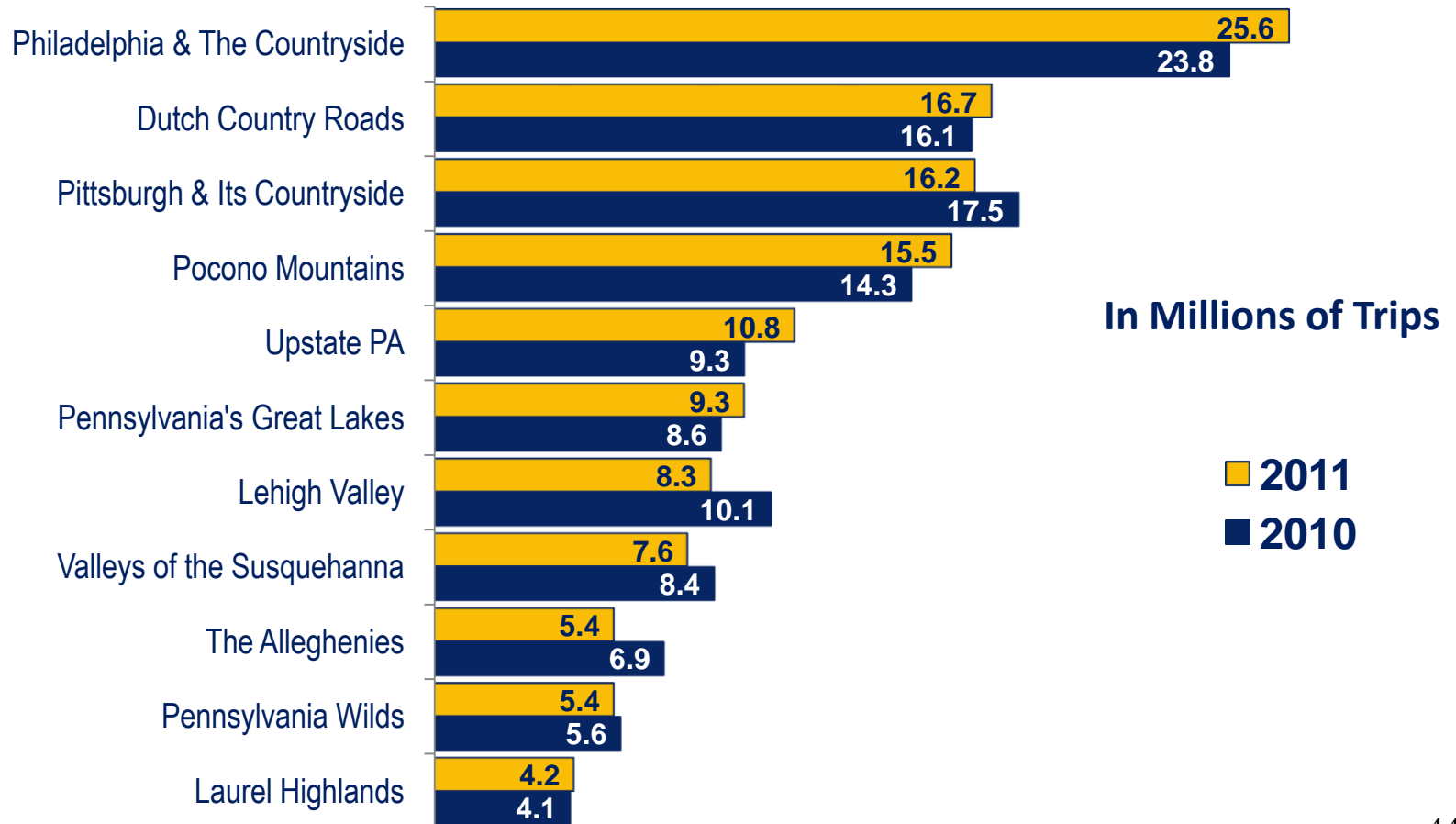
Pennsylvania 2011 Purpose of Stay Comparison between Overnight and Day-trip



The graph below illustrates the differences in the purpose of stay of PA's overnight and day-trip travelers in 2011.



Regions Visited on Day-Trips*



*Spent time in region

Total will add to more than State total as some tourists visit more than one region.

Pennsylvania Overnight Trips

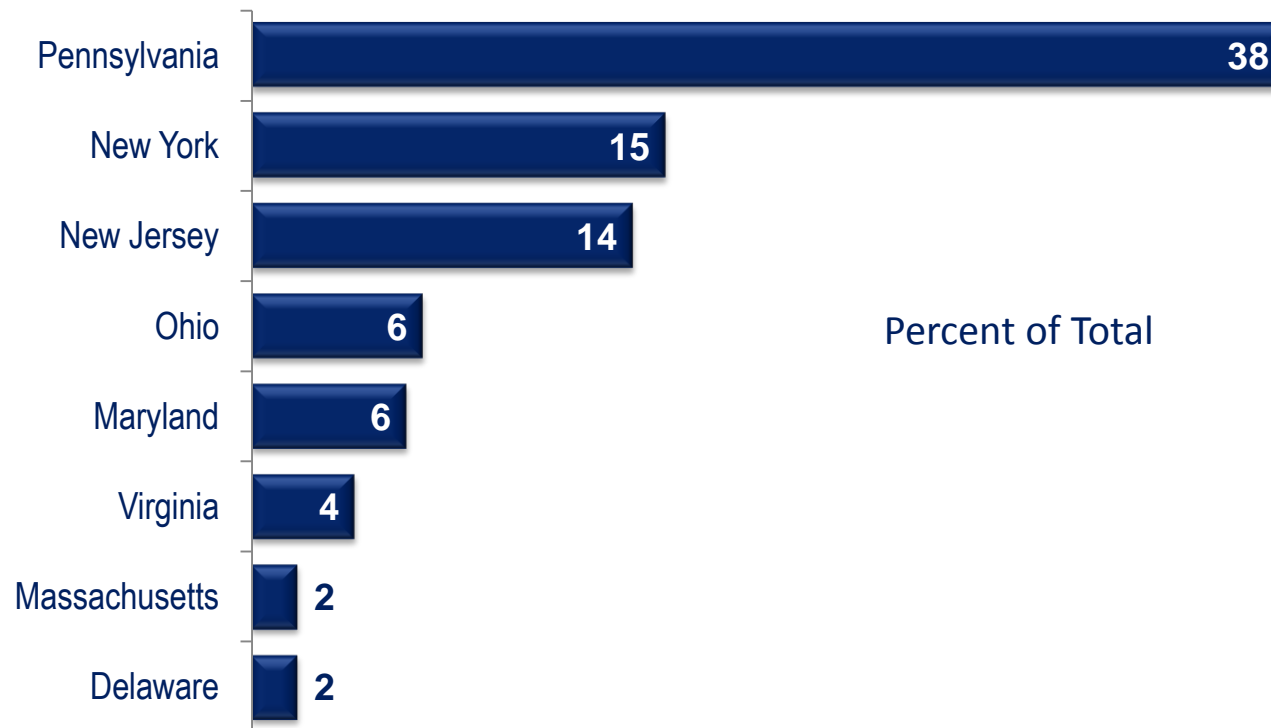
Origin Markets for Pennsylvania Overnight Trips

Main Origin States for Pennsylvania's Marketable Overnight Travelers



Base: Marketable Overnight Trips

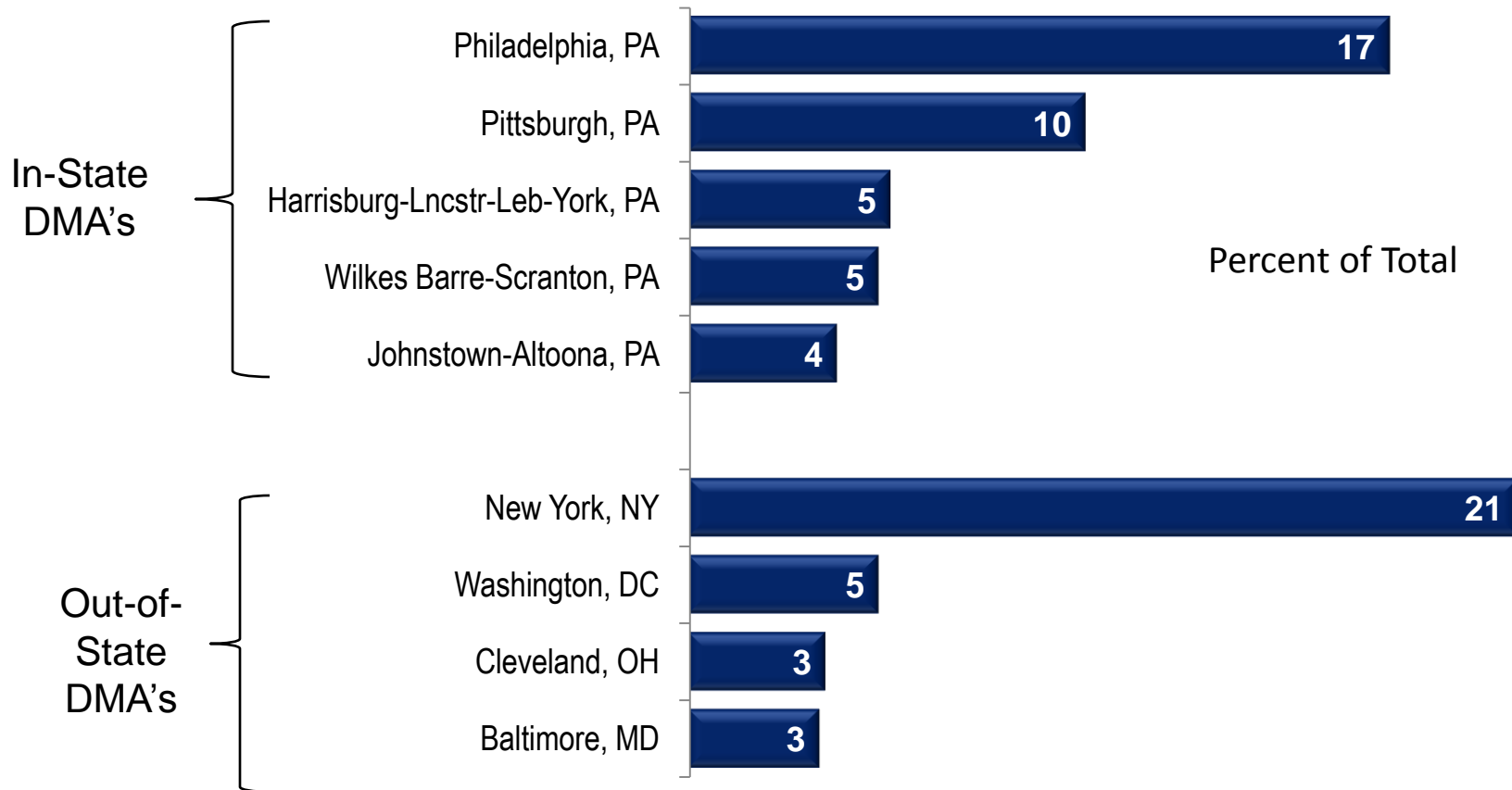
Consistent with past trends, over two-thirds of Pennsylvania's marketable overnight travelers in 2011 were from Pennsylvania, New York or New Jersey.



Main Urban Markets for Pennsylvania's Marketable Overnight Travelers



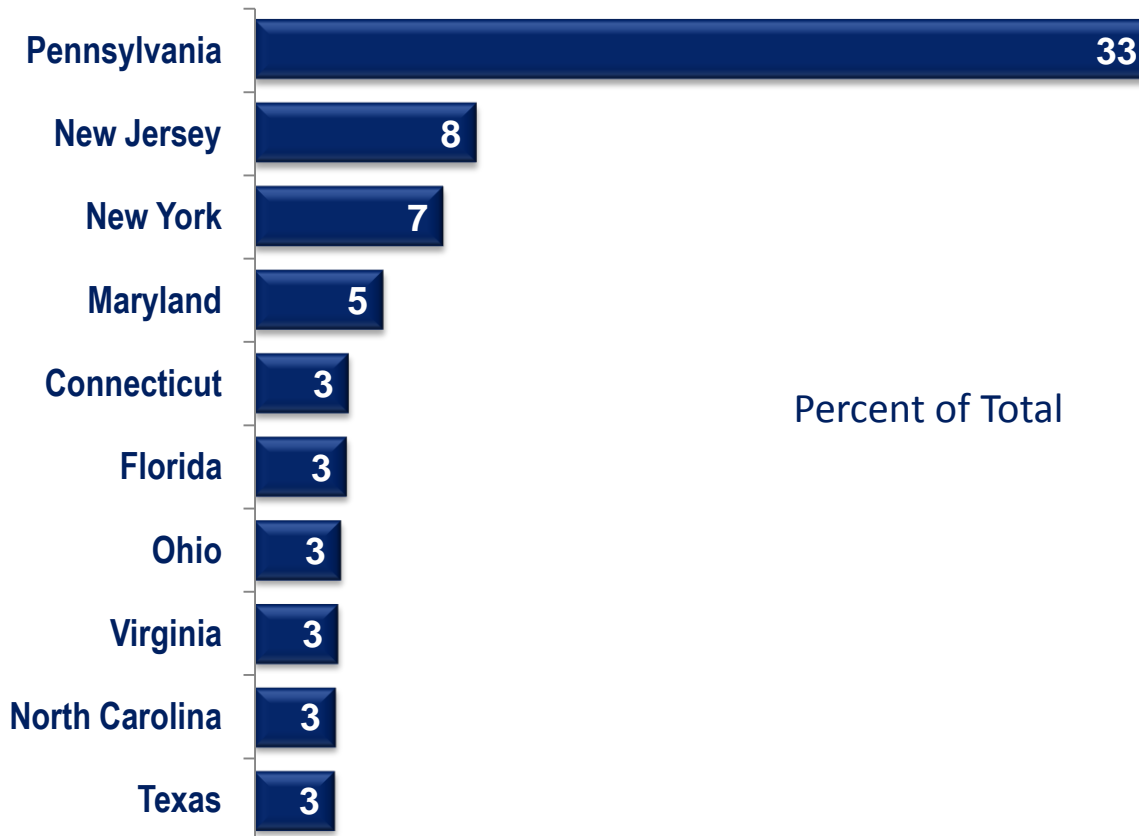
Base: Marketable Overnight Trips



Main Origin States for Pennsylvania's Business Overnight Travelers



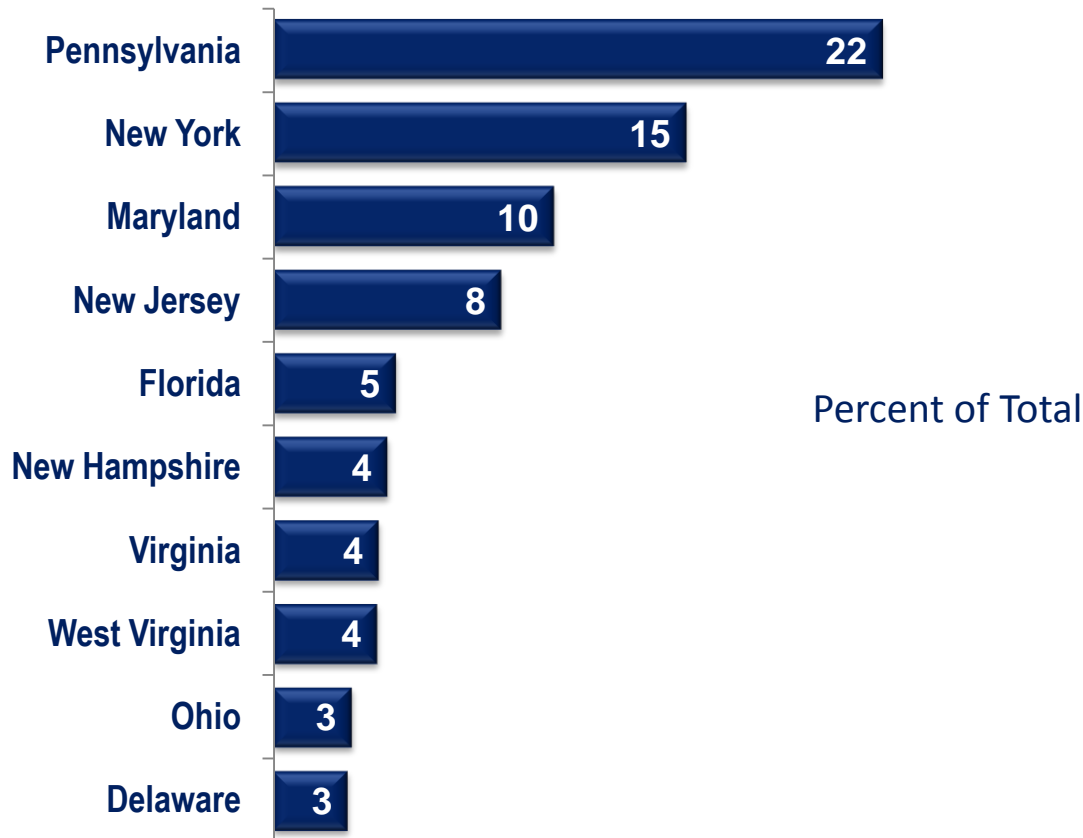
Base: Business Overnight Trips



Main Origin States for Pennsylvania's Overnight Business-Leisure Trips



Base: Business-Leisure Overnight Trips



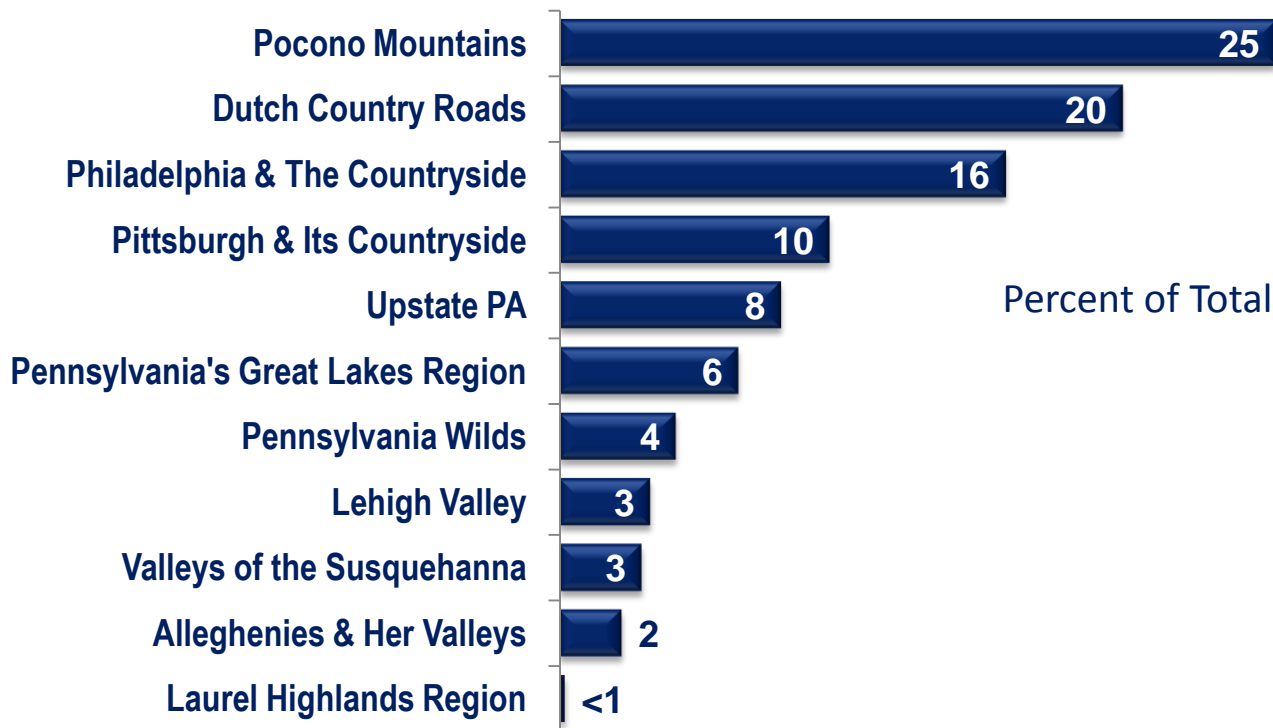
Pennsylvania Tourism Regions Visited by Travelers' State of Residence

Pennsylvania Tourism Regions Visited by New York Residents



Base: Marketable Overnight Trips

The Pocono Mountains region was the most popular PA destination for marketable overnight travelers from New York state in 2011, followed by Dutch Country Roads.



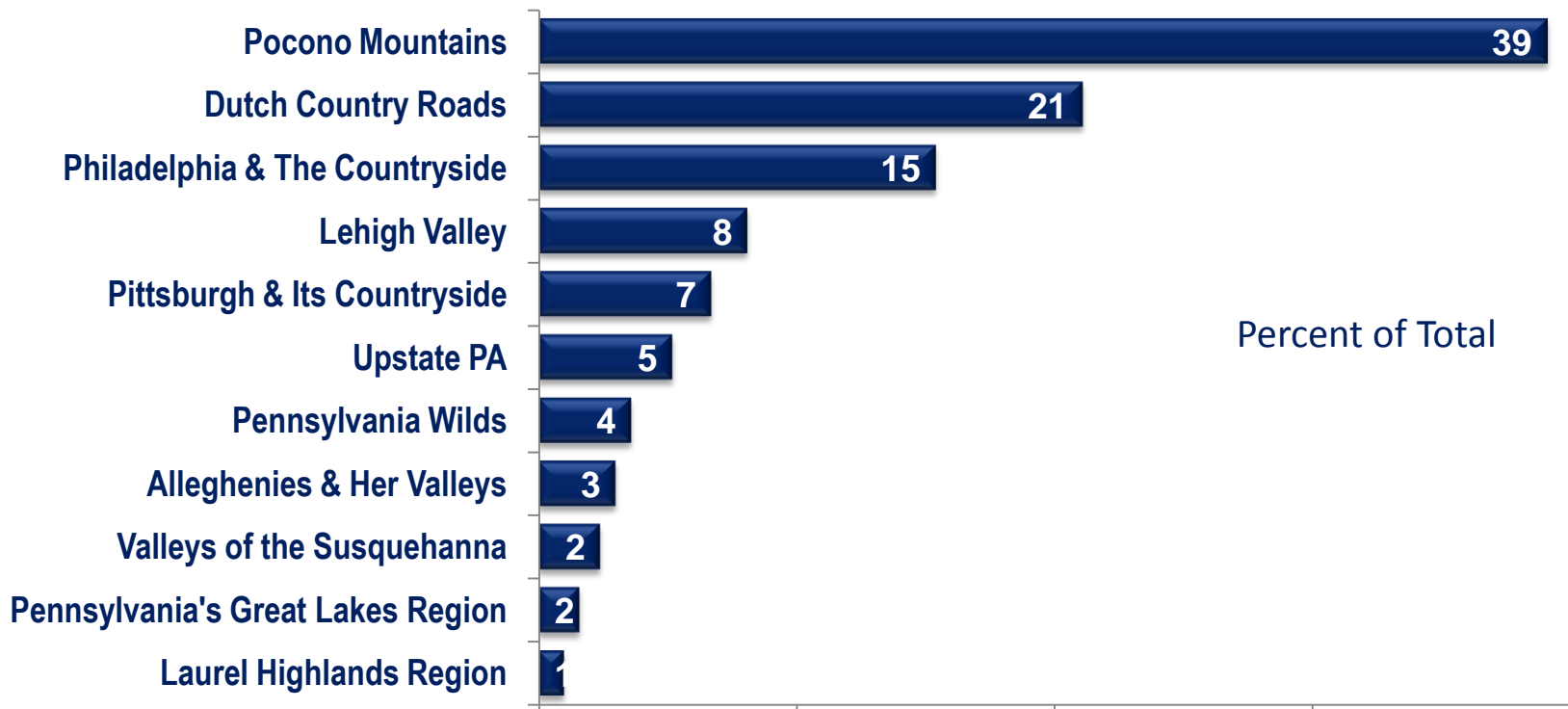
Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.

Pennsylvania Tourism Regions Visited by New Jersey Residents



Base: Marketable Overnight Trips

The Pocono Mountains was also the most popular PA destination for marketable overnight travelers from New Jersey in 2011, followed by Dutch Country Roads.



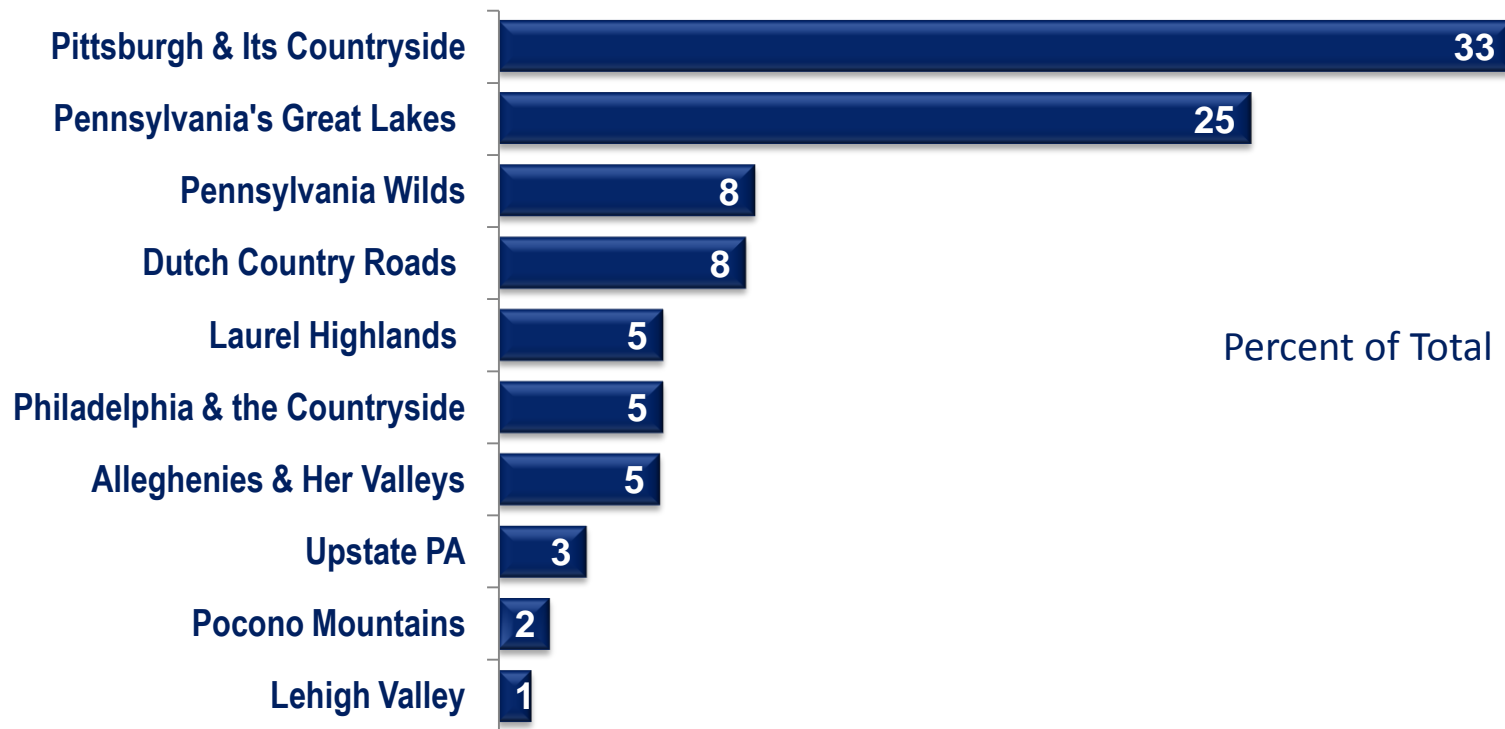
Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.

Pennsylvania Tourism Regions Visited by Ohio Residents



Base: Marketable Overnight Trips

Pittsburgh & Its Countryside region was the most popular PA destination for marketable overnight travelers from Ohio in 2011, followed by Pennsylvania's Great Lakes Region.



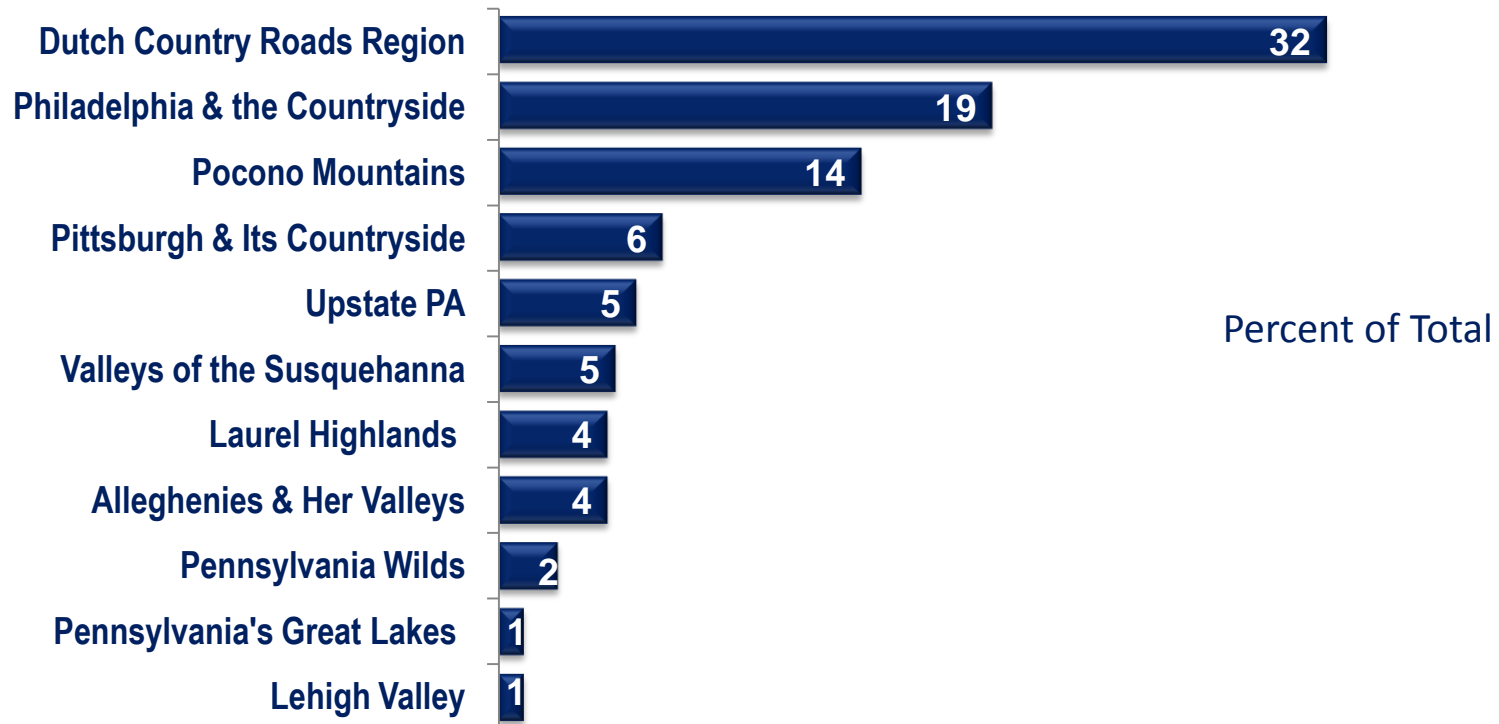
Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.

Pennsylvania Tourism Regions Visited by Maryland Residents



Base: Marketable Overnight Trips

The Dutch Country Roads region was, by far, the most popular PA destination for marketable overnight travelers from Maryland in 2011.



Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.

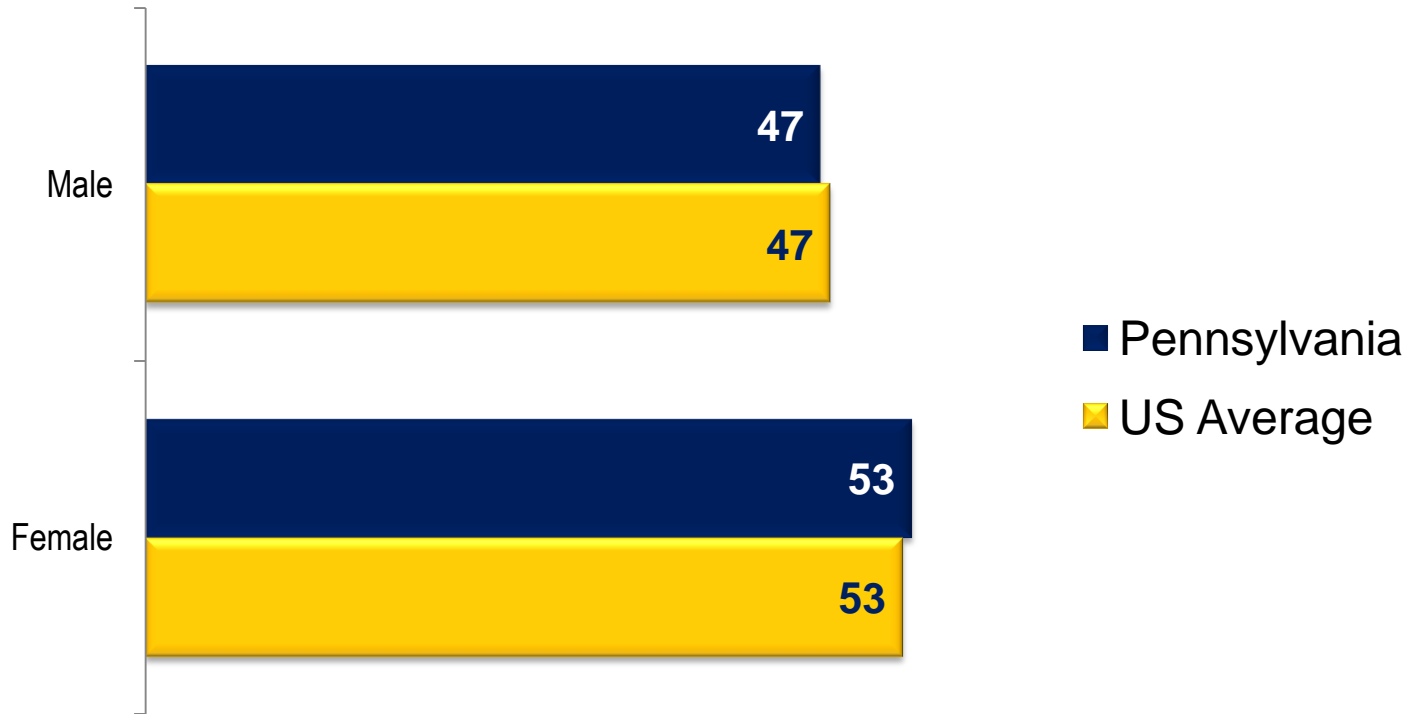
Traveler Profile — Overnight Marketable Trips

Gender



Base: Overnight Marketable Trips

Percent of Total

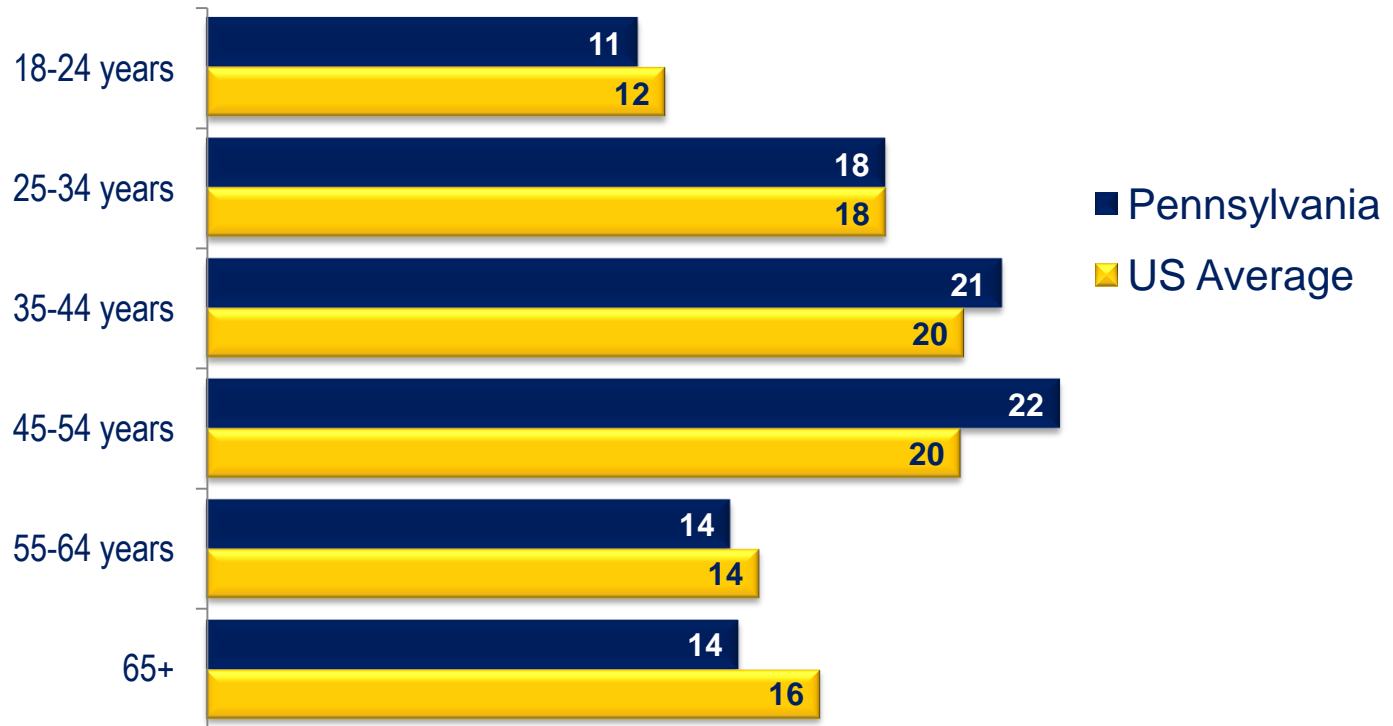


Age



Base: Overnight Marketable Trips

Percent of Total



Pennsylvania

US

Median Age

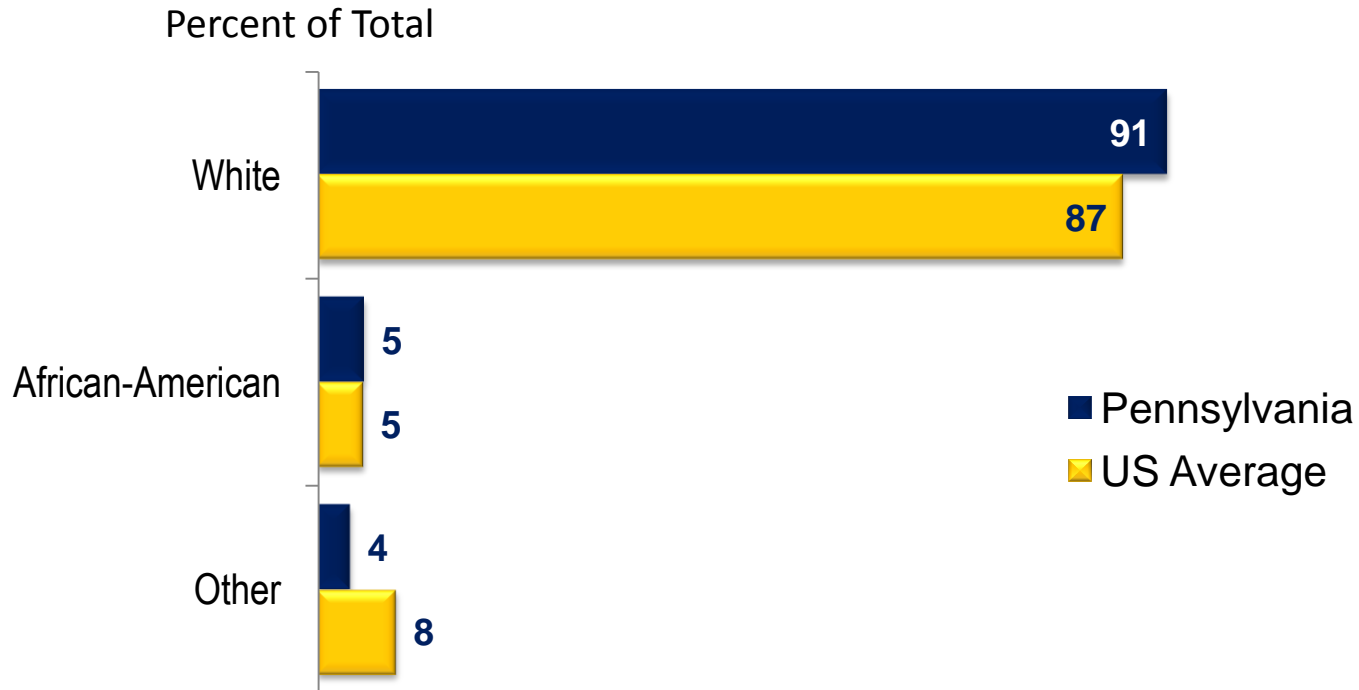
44.9

44.9

Race



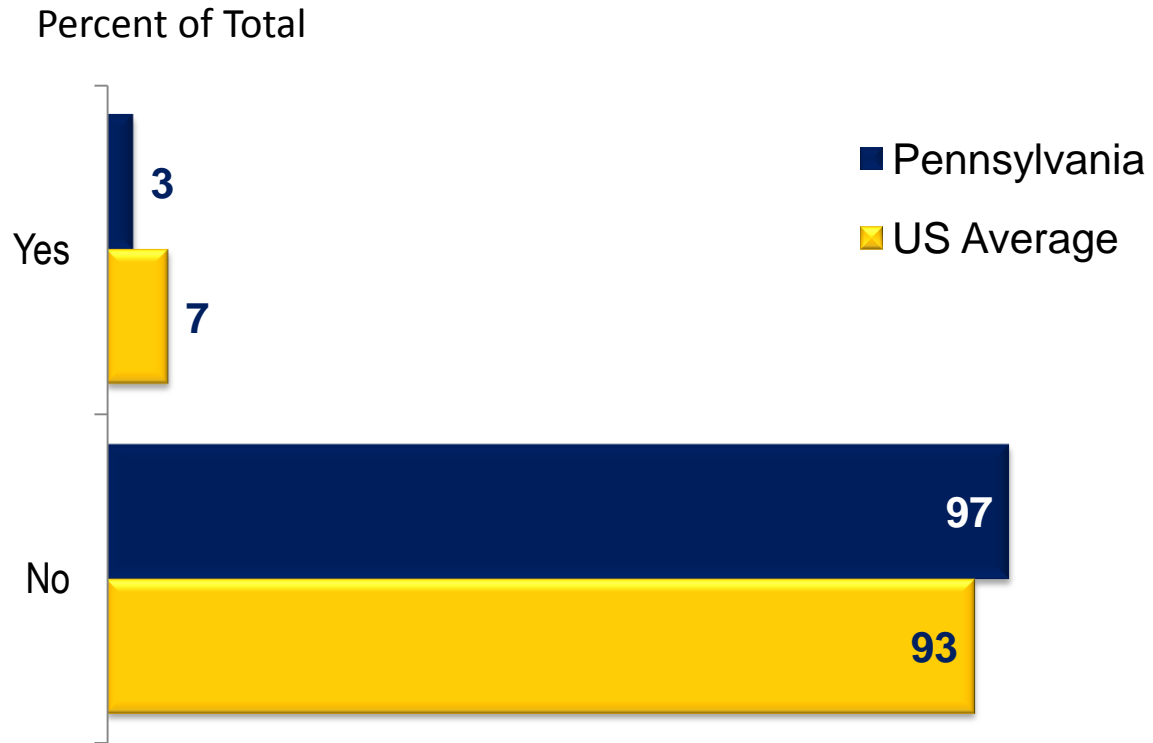
Base: Overnight Marketable Trips



Hispanic Background



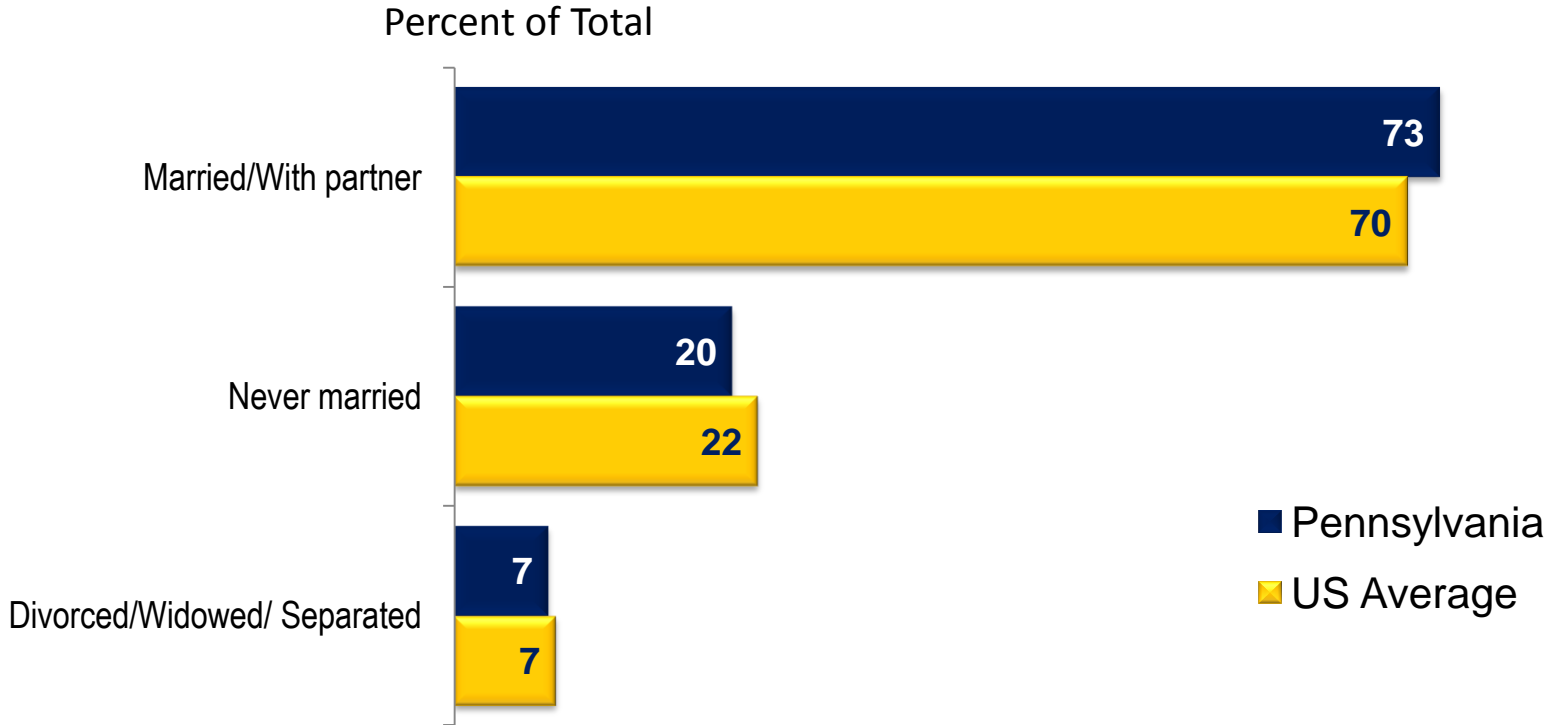
Base: Overnight Marketable Trips



Marital Status



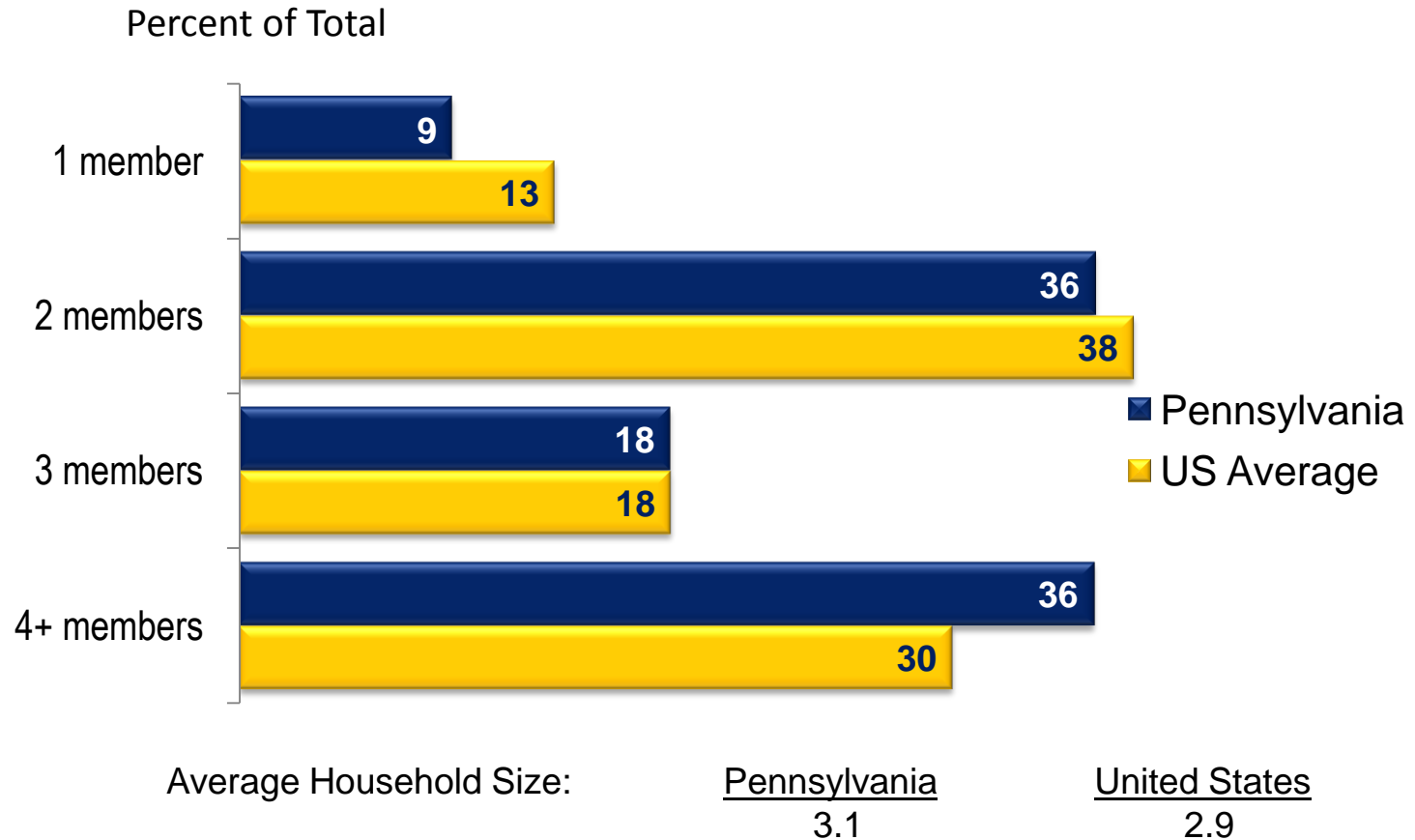
Base: Overnight Marketable Trips



Household Size



Base: Overnight Marketable Trips

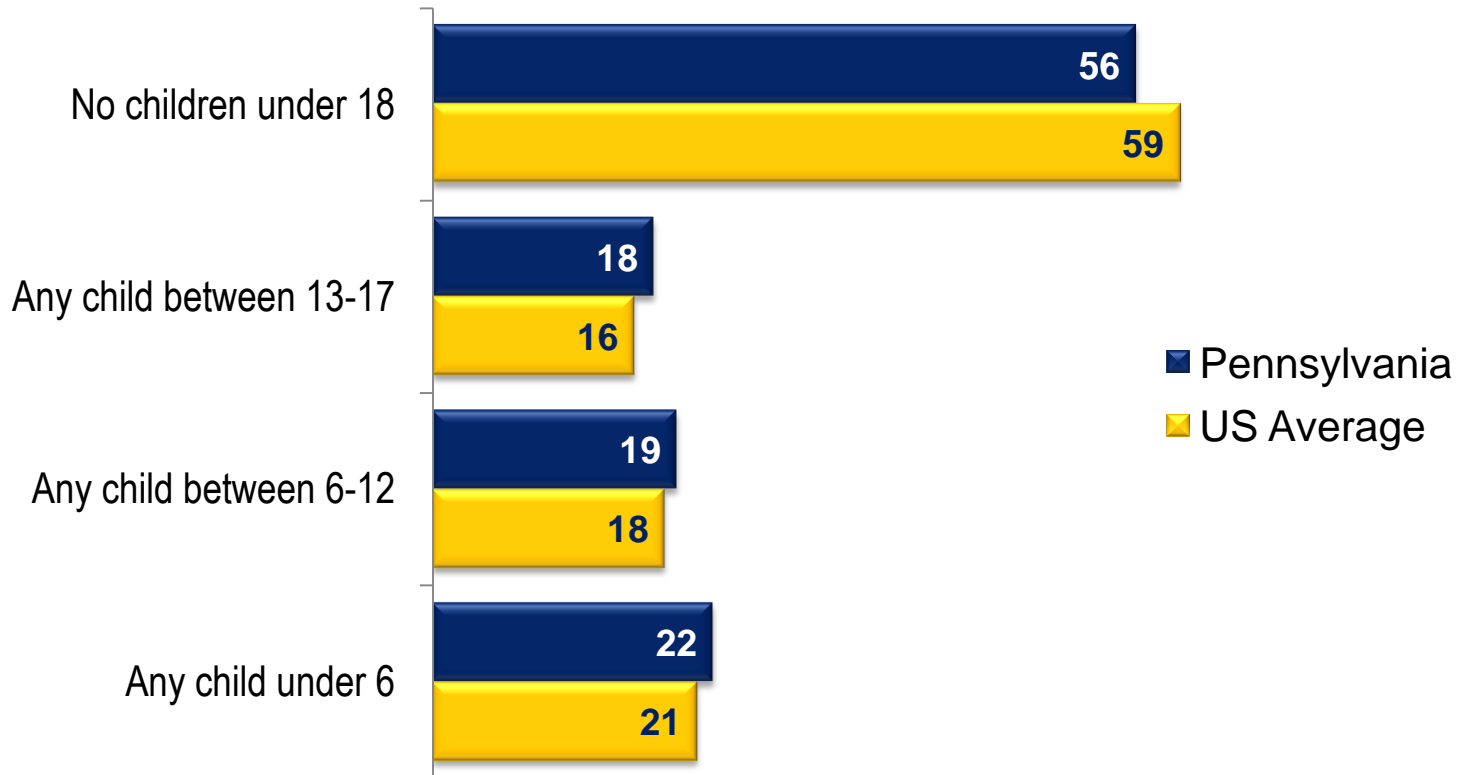


Presence of Children in Household



Base: Overnight Marketable Trips

Percent of Adult Travelers with Children Under Age 18 Living at Home



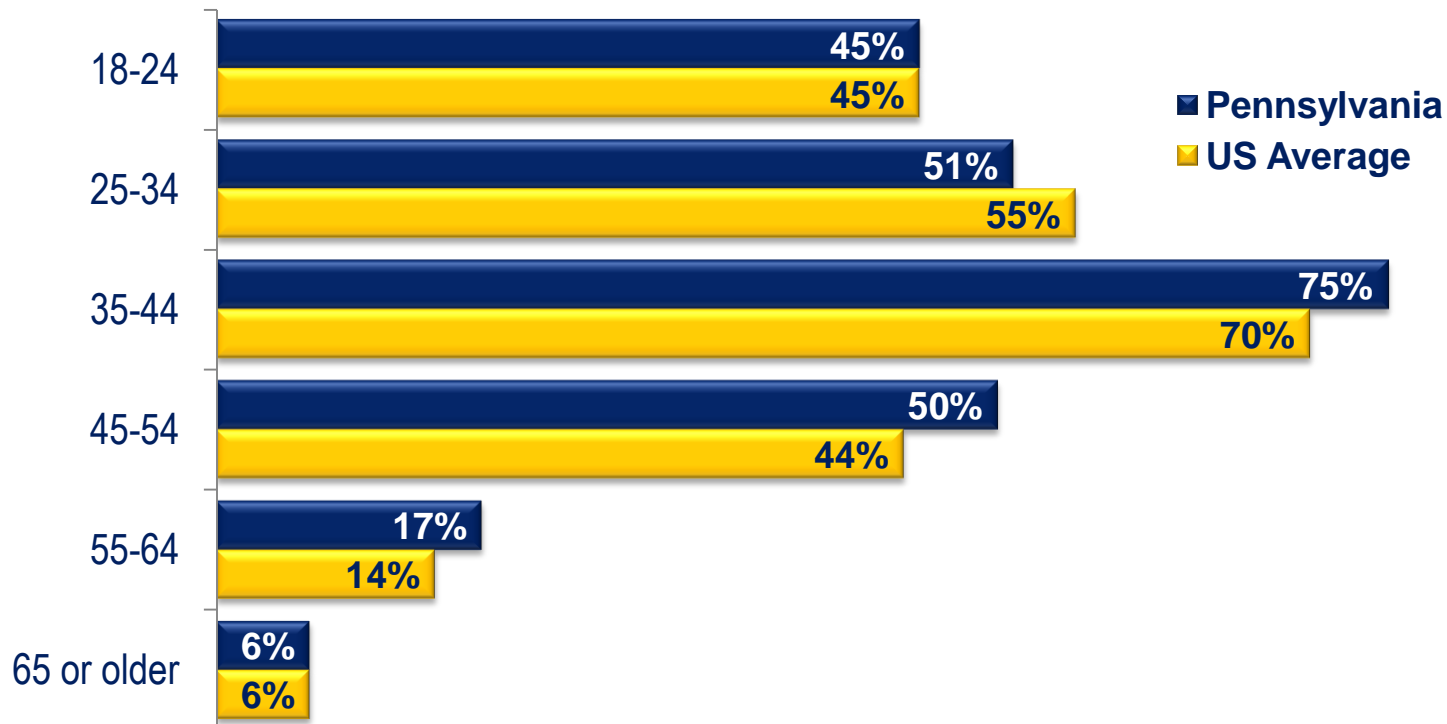
Presence of Children in Household by Age of Adult Traveler



Base: Overnight Marketable Trips

Three out of four PA adult travelers in the 35-44 age group have children under age 18 living at home – a substantially higher proportion than the other age groups.

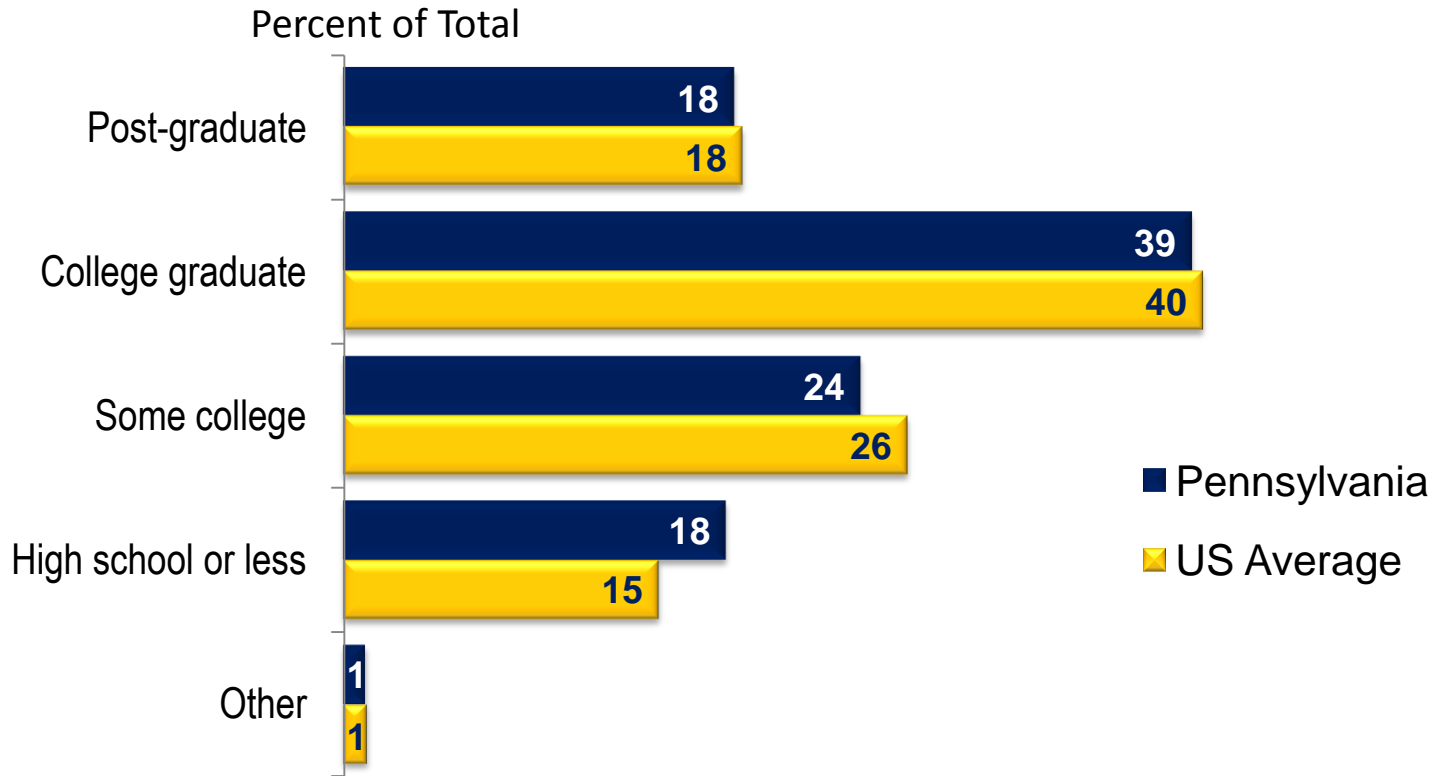
Percent of Adult Travelers with Children Under Age 18 Living at Home



Education



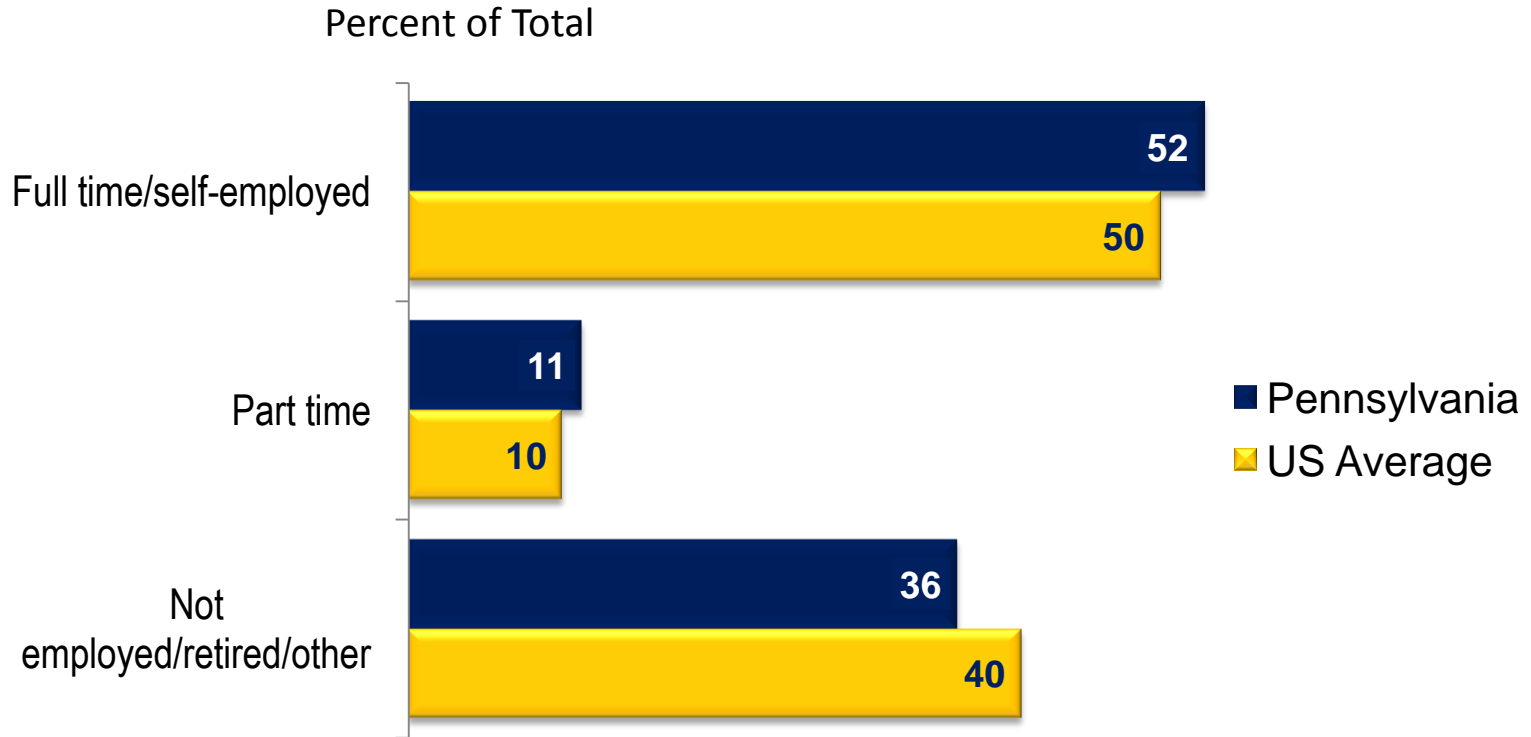
Base: Overnight Marketable Trips



Employment



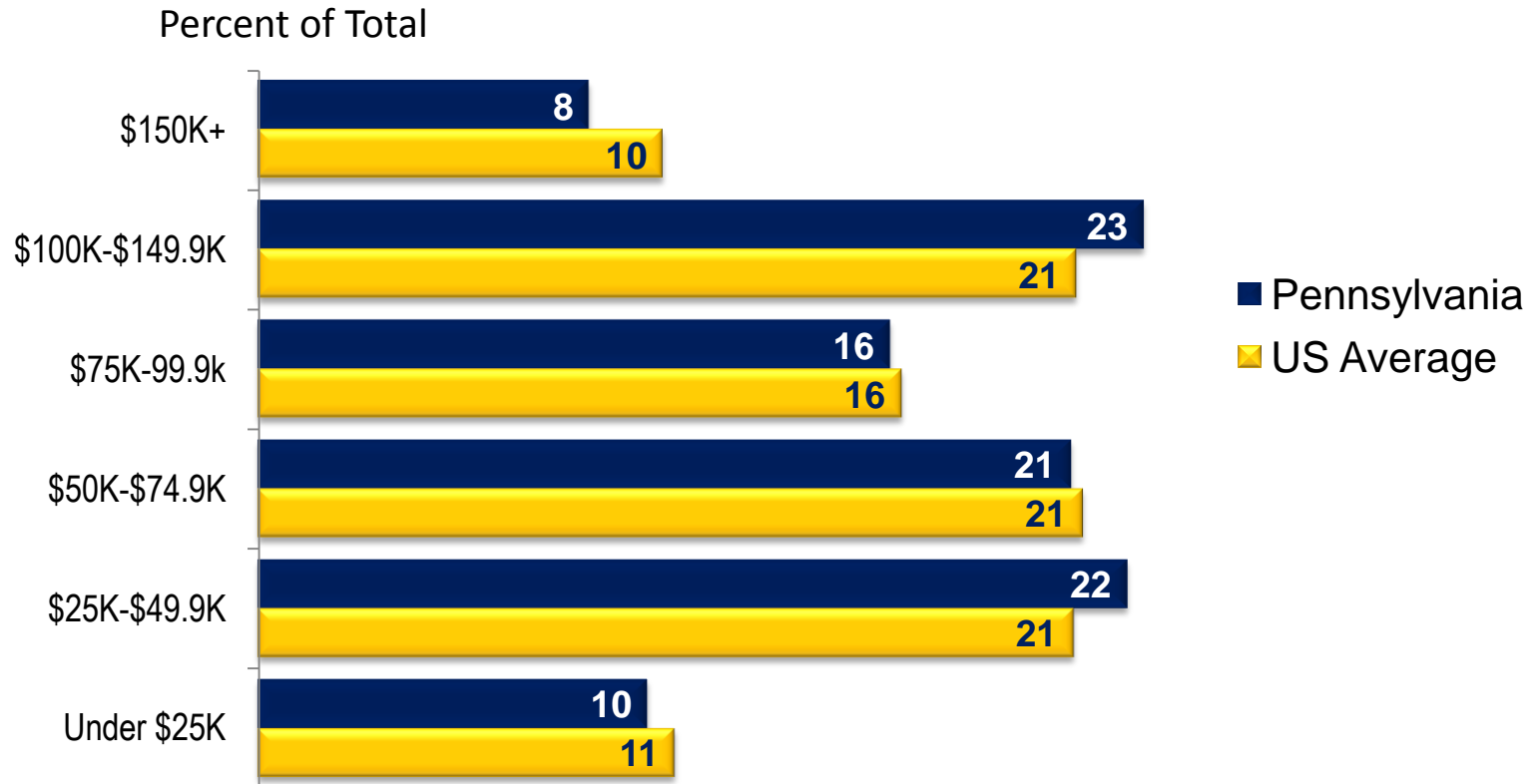
Base: Overnight Marketable Trips



Income



Base: Overnight Marketable Trips



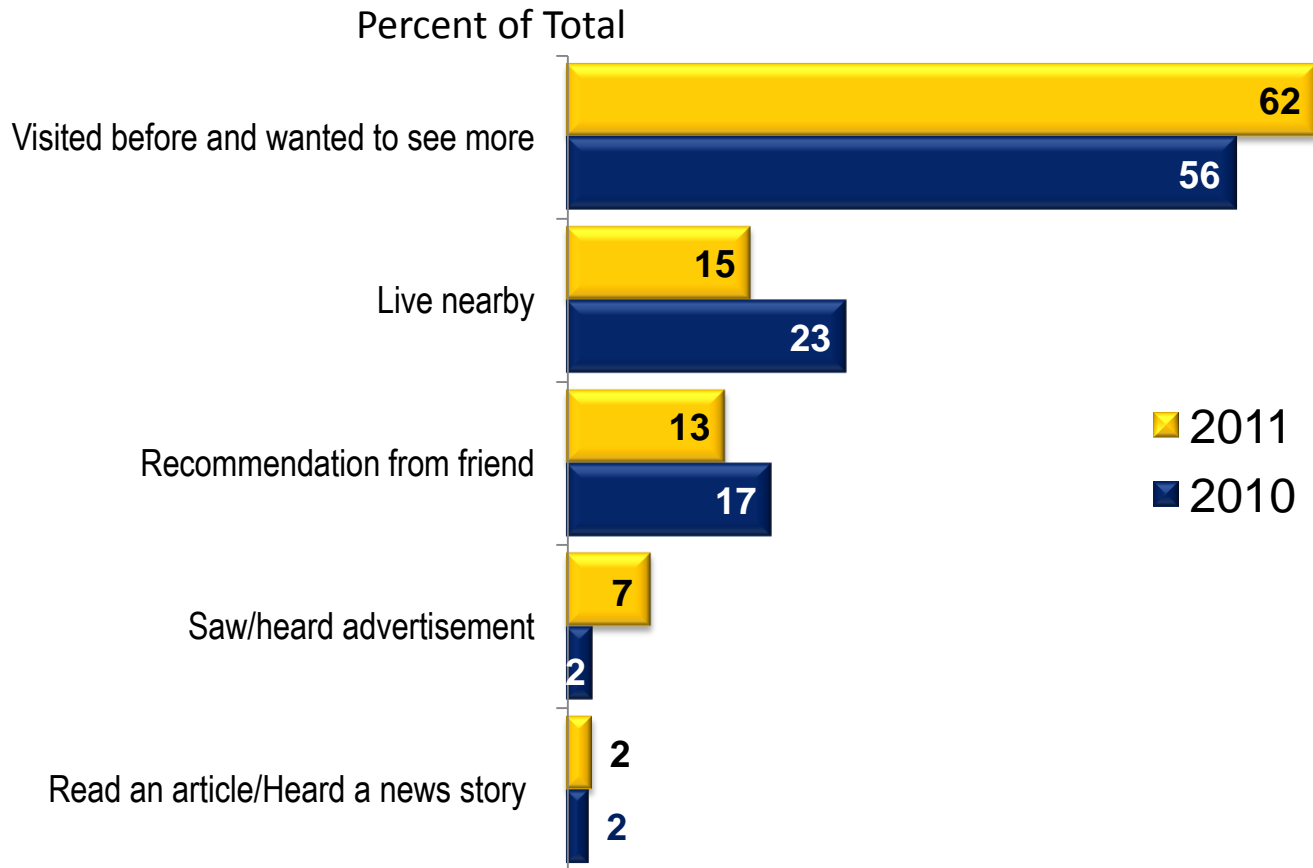
Trip Planning & Booking

Pennsylvania Overnight Marketable Trips

Main Reason for Choosing Pennsylvania



Base: Overnight Marketable Trips



Planning Cycle



Base: Overnight Marketable Trips

Percent of Total

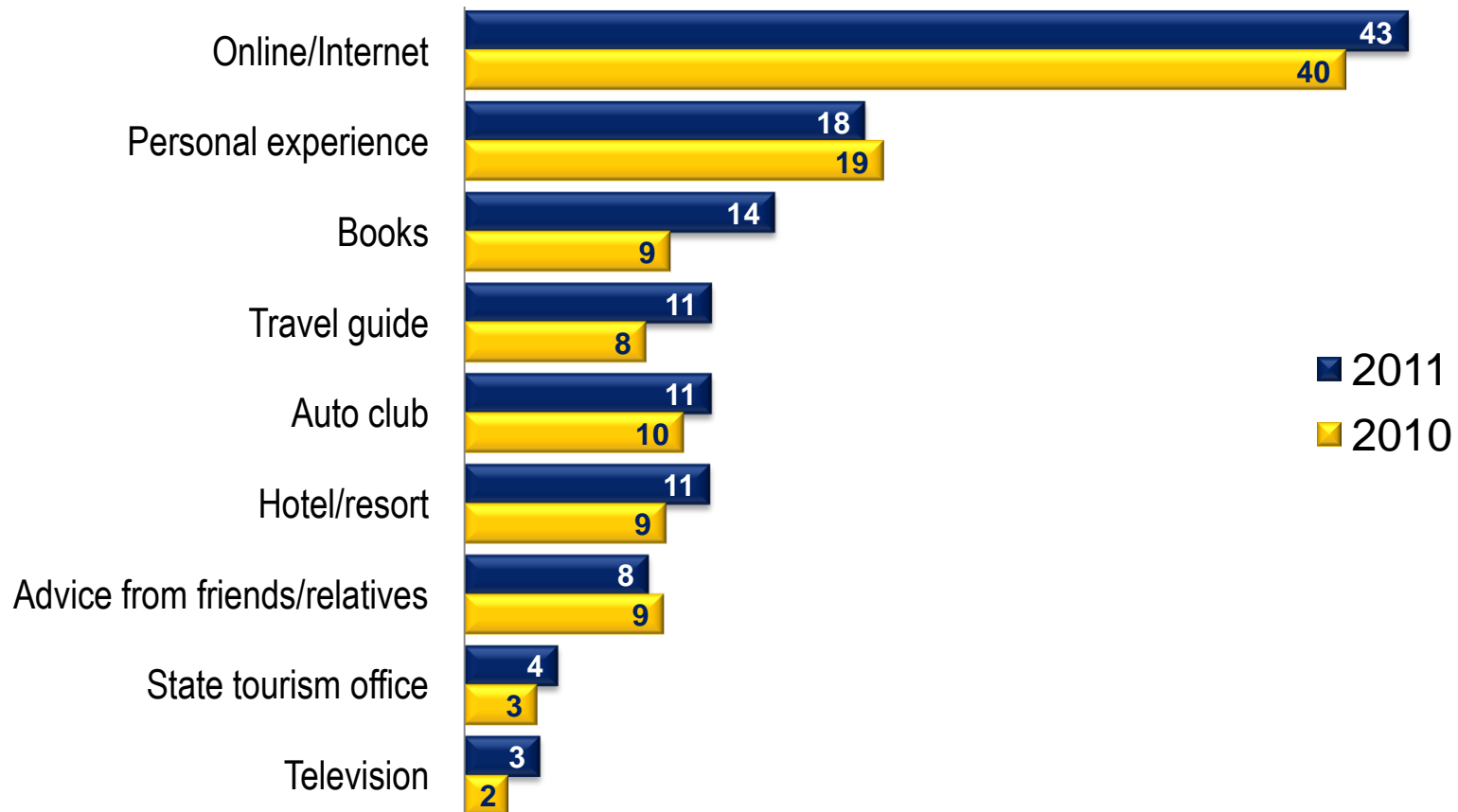


Information Sources Used for Planning the Trip



Base: Overnight Marketable Trips

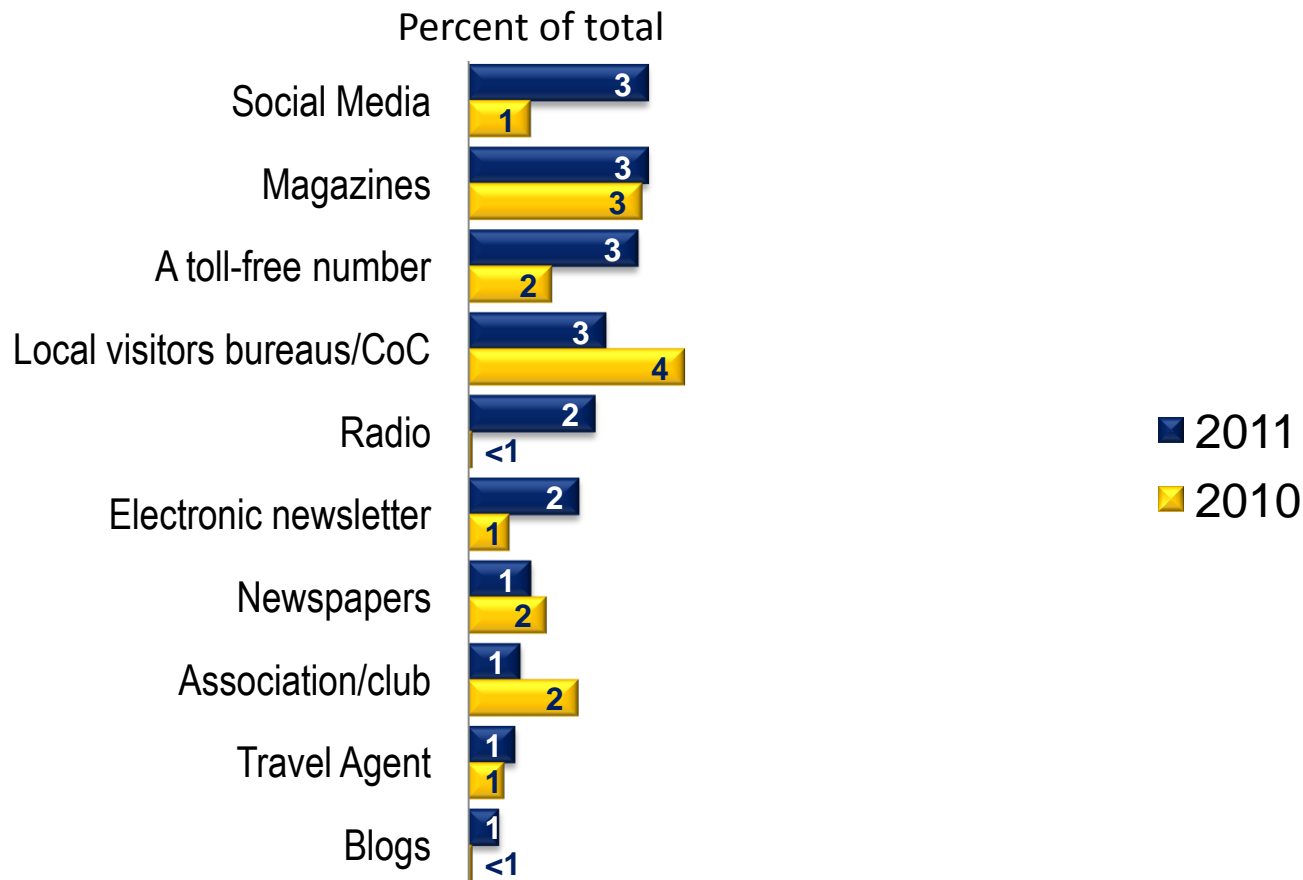
Percent of Total



Information Sources Used for Planning the Trip (cont'd)



Base: Overnight Marketable Trips

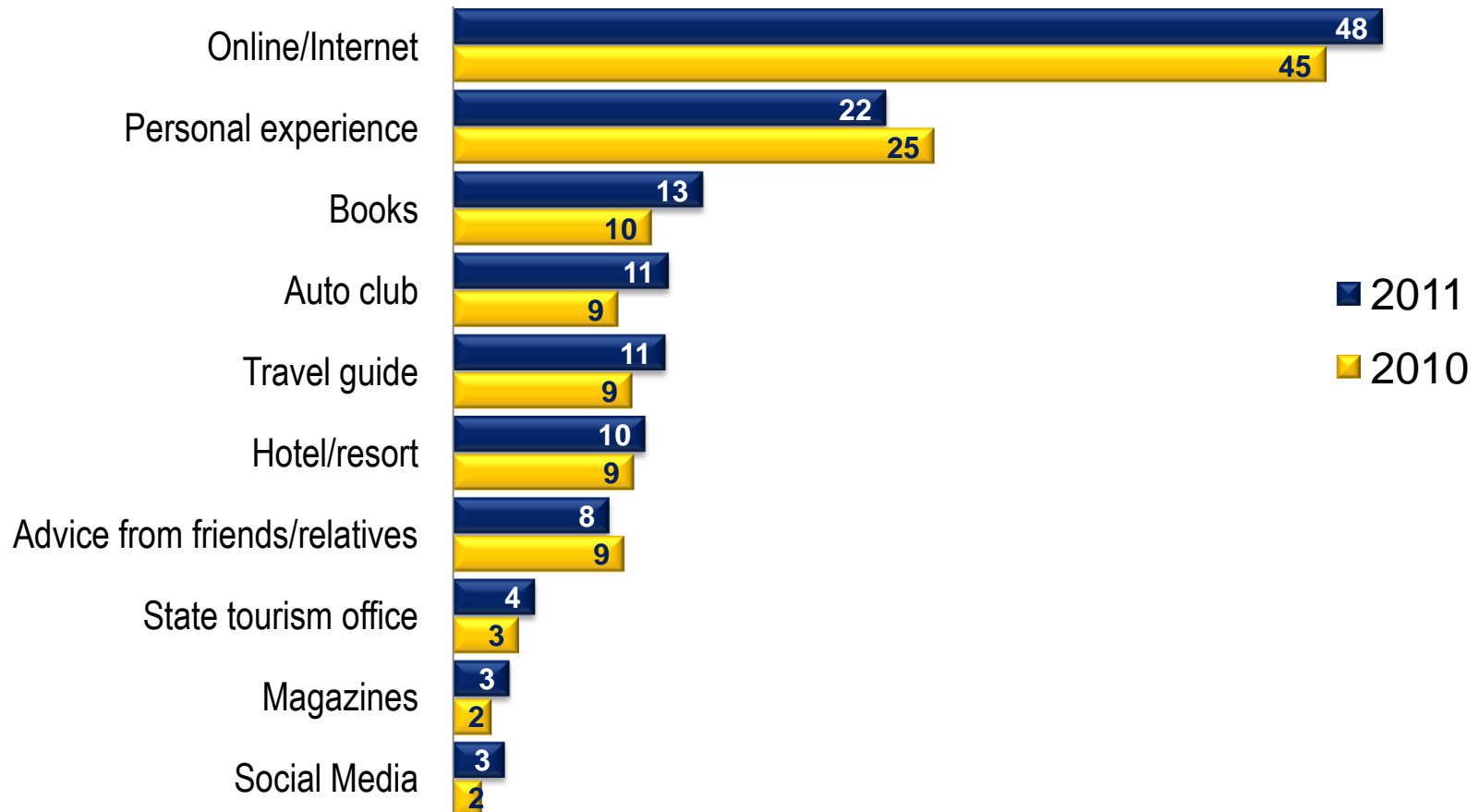


Information Sources Considered Useful for Planning the Trip



Base: Overnight Marketable Trips

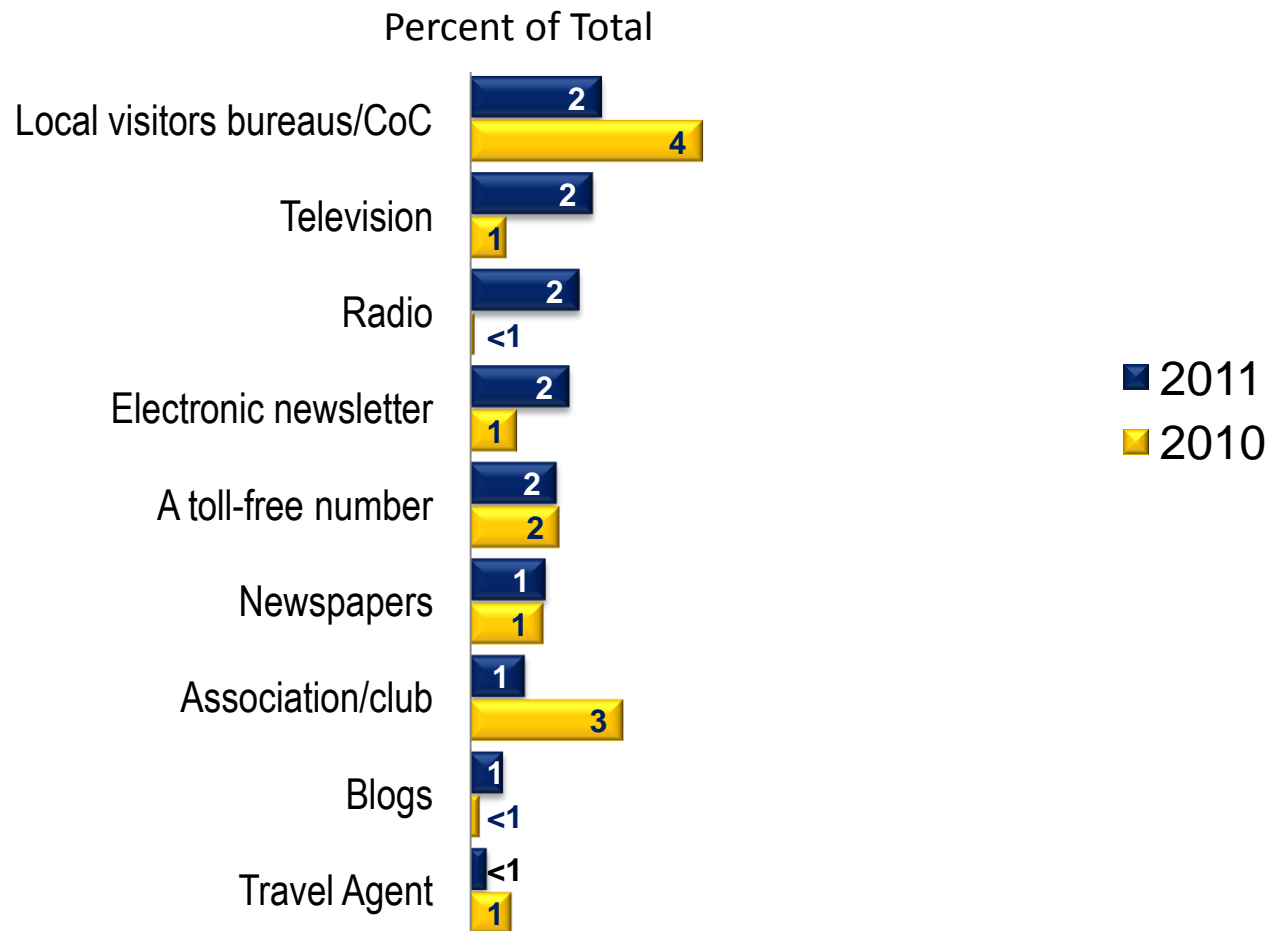
Percent of Total



Information Sources Considered Useful for Planning the Trip (cont'd)



Base: Overnight Marketable Trips

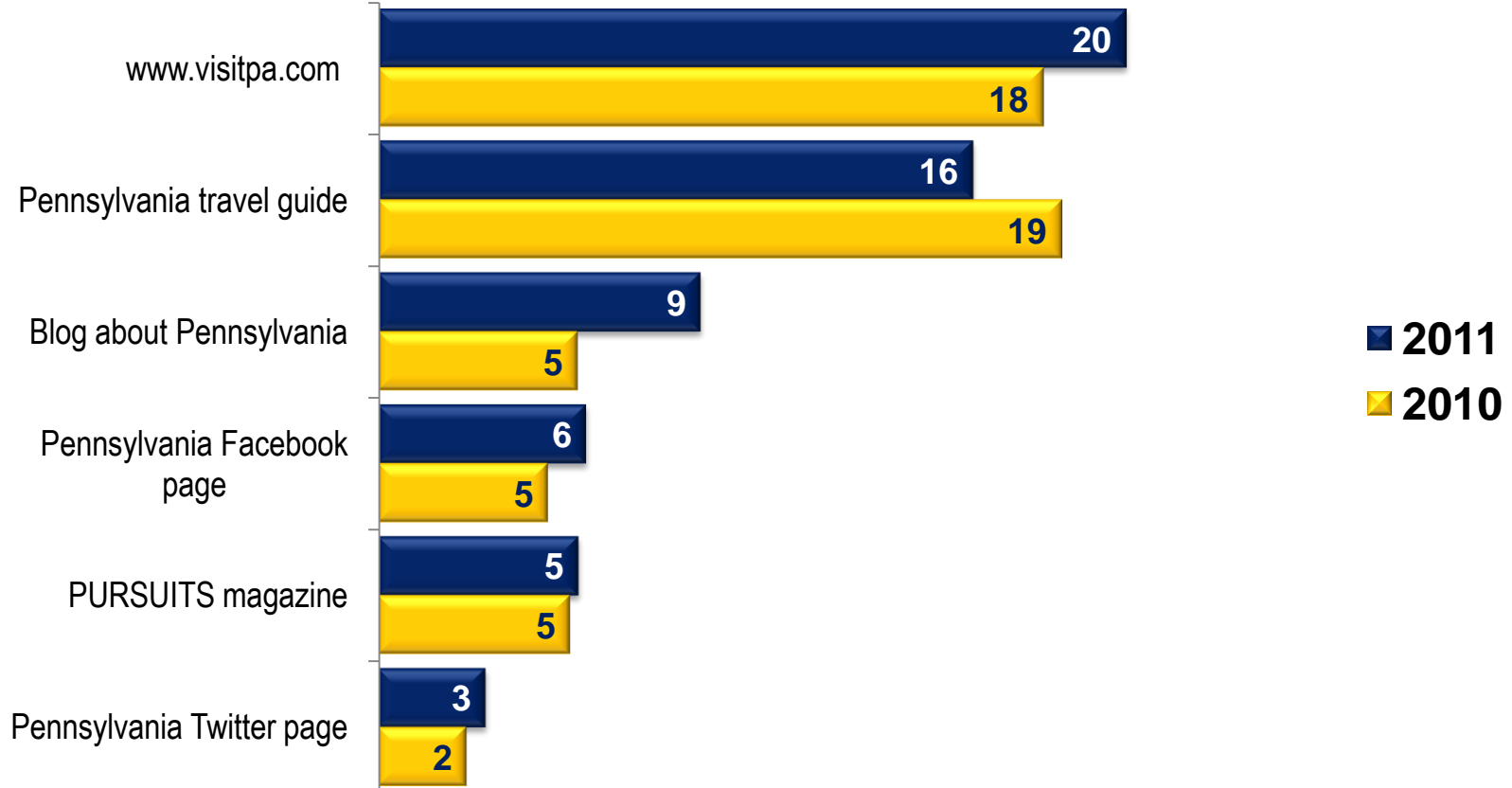


Use of Pennsylvania Tourism Office Trip Planning Tools



Base: Overnight Marketable Trips

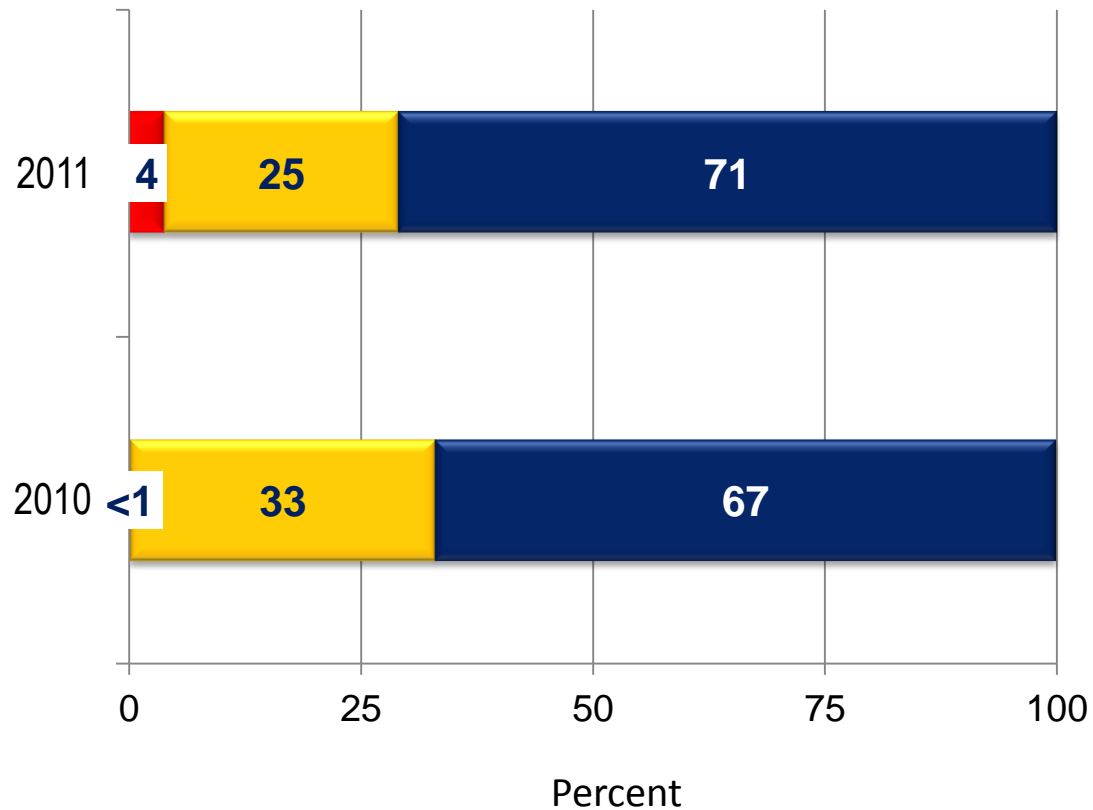
Percent of Total



www.visitpa.com Usefulness



Base: Overnight Marketable Trips



3-Pt. Scale: ■ Not Very Useful

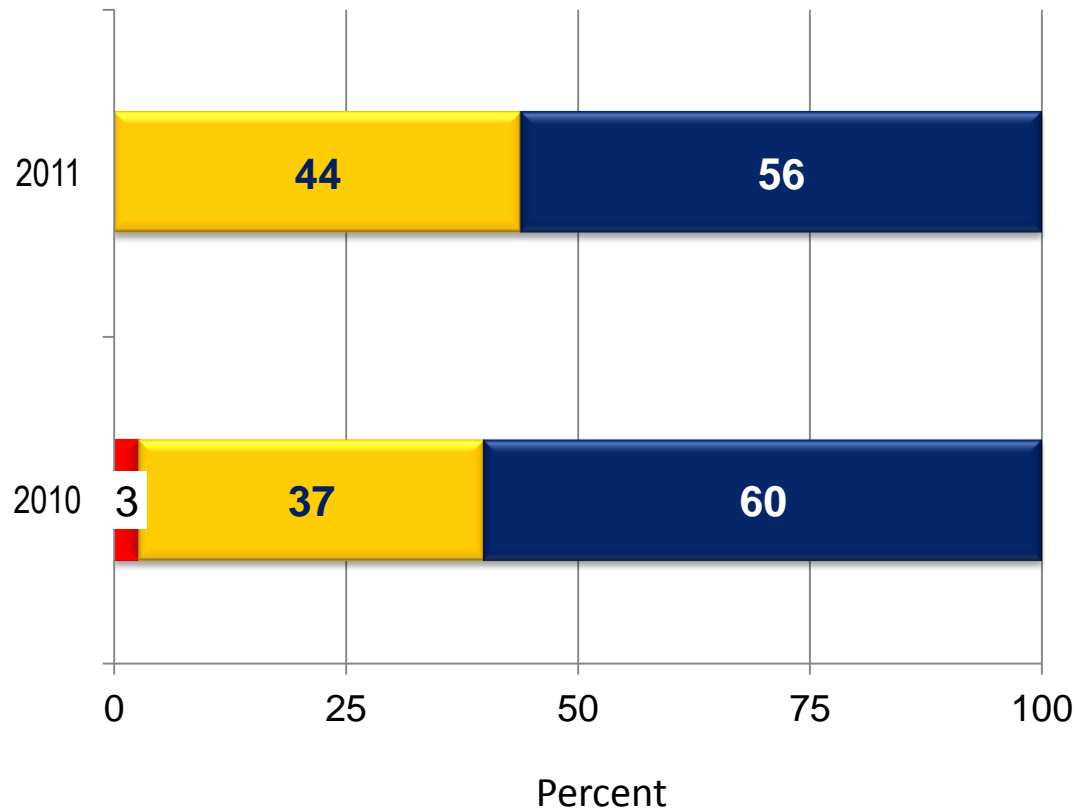
■ Somewhat Useful

■ Very Useful

Pennsylvania Travel Guide Usefulness



Base: Overnight Marketable Trips



3-Pt. Scale: ■ Not Very Useful

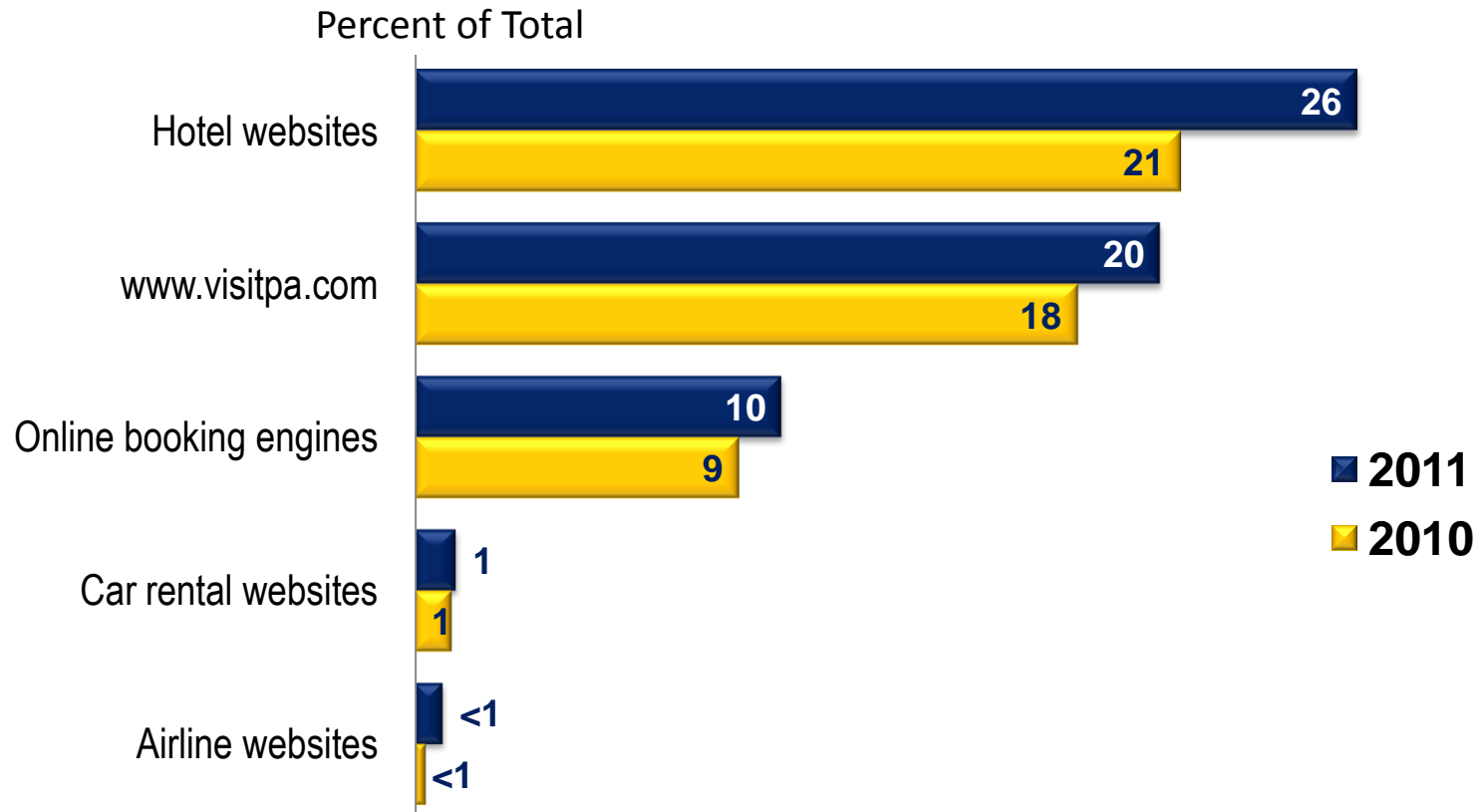
■ Somewhat Useful

■ Very Useful

Websites Used for Planning Pennsylvania Trip



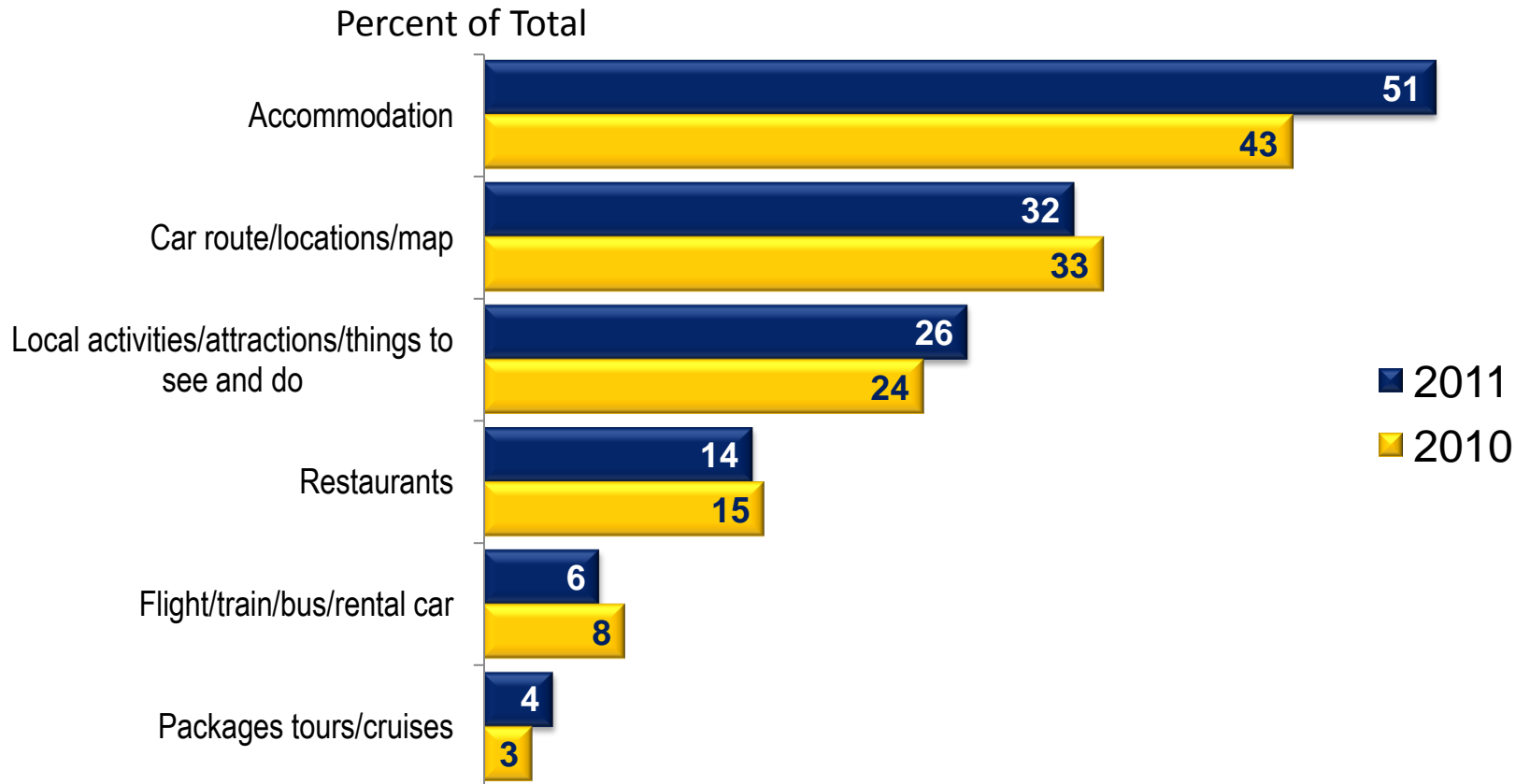
Base: Overnight Marketable Trips



Trip Elements Planned Using Internet



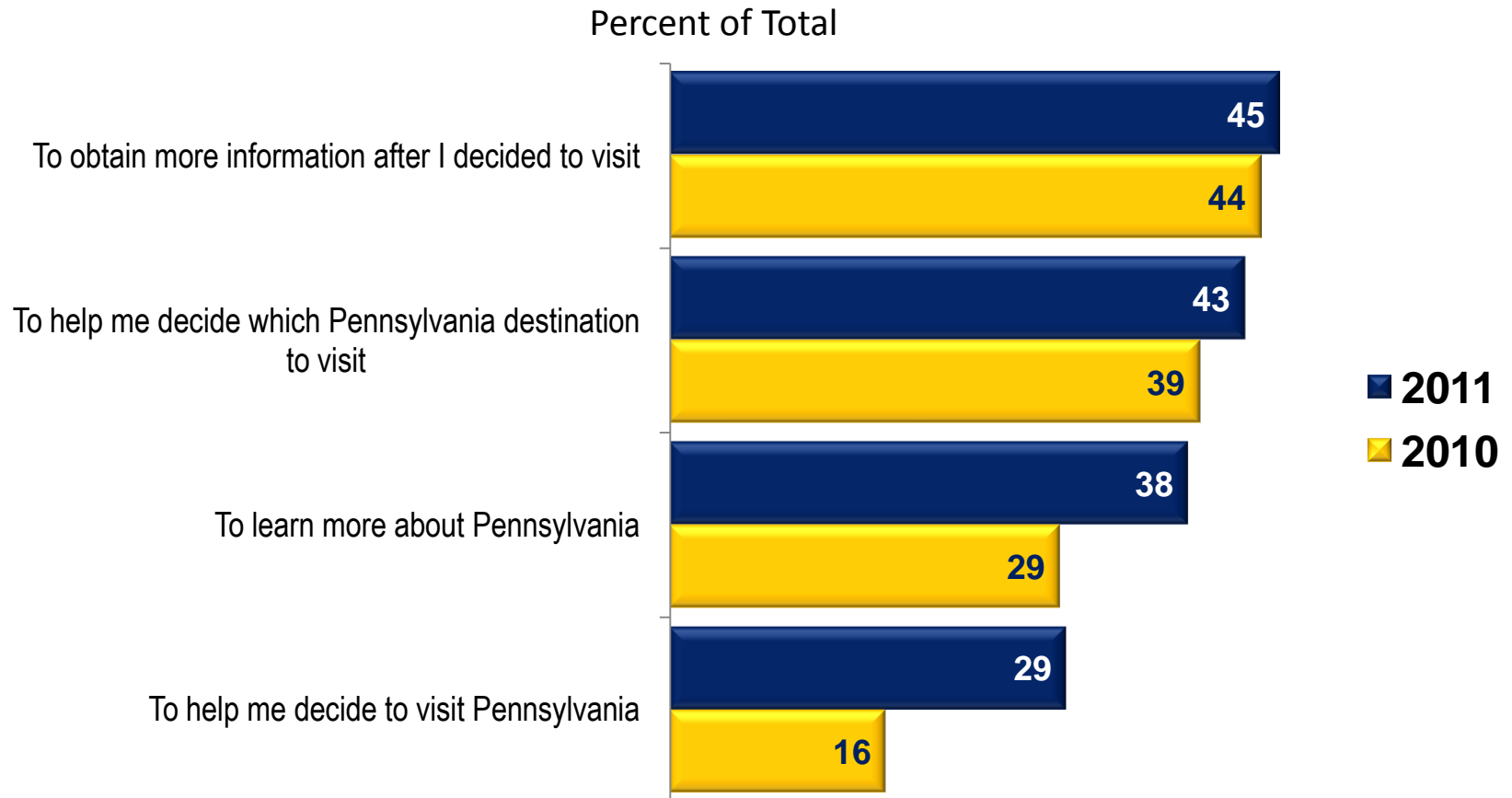
Base: Overnight Marketable Trips



Reasons for Visiting www.visitpa.com



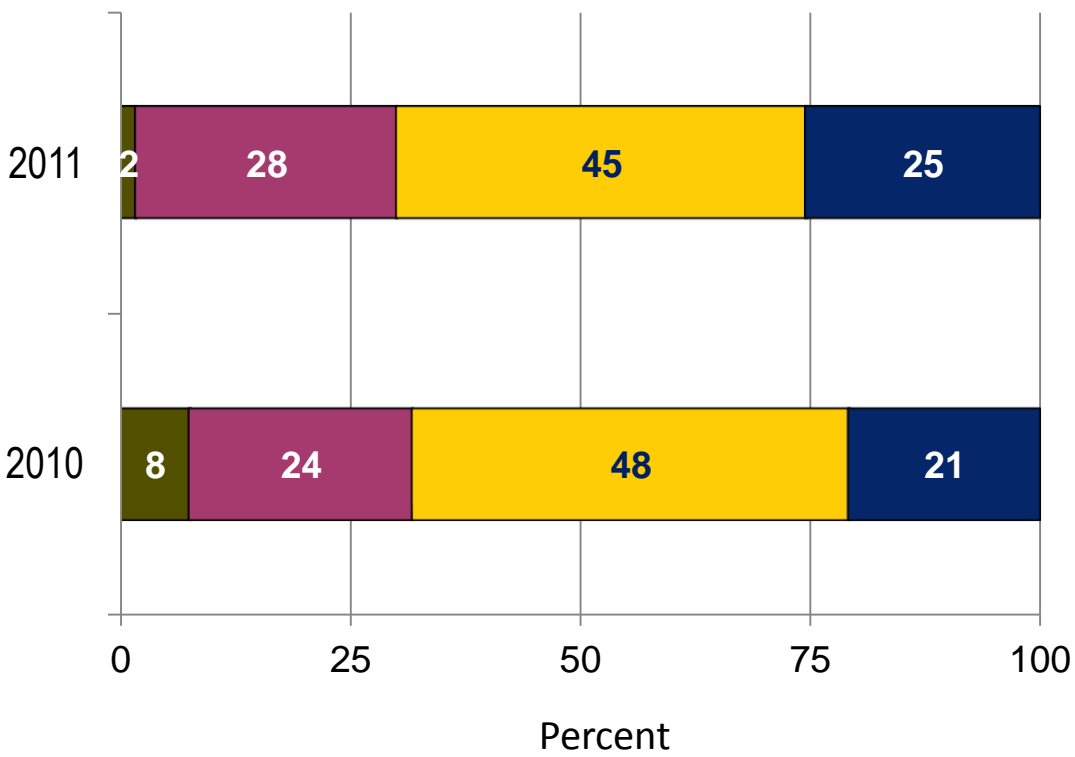
Base: Overnight Marketable Trips



www.visitpa.com Influence on Planning



Base: Overnight Marketable Trips

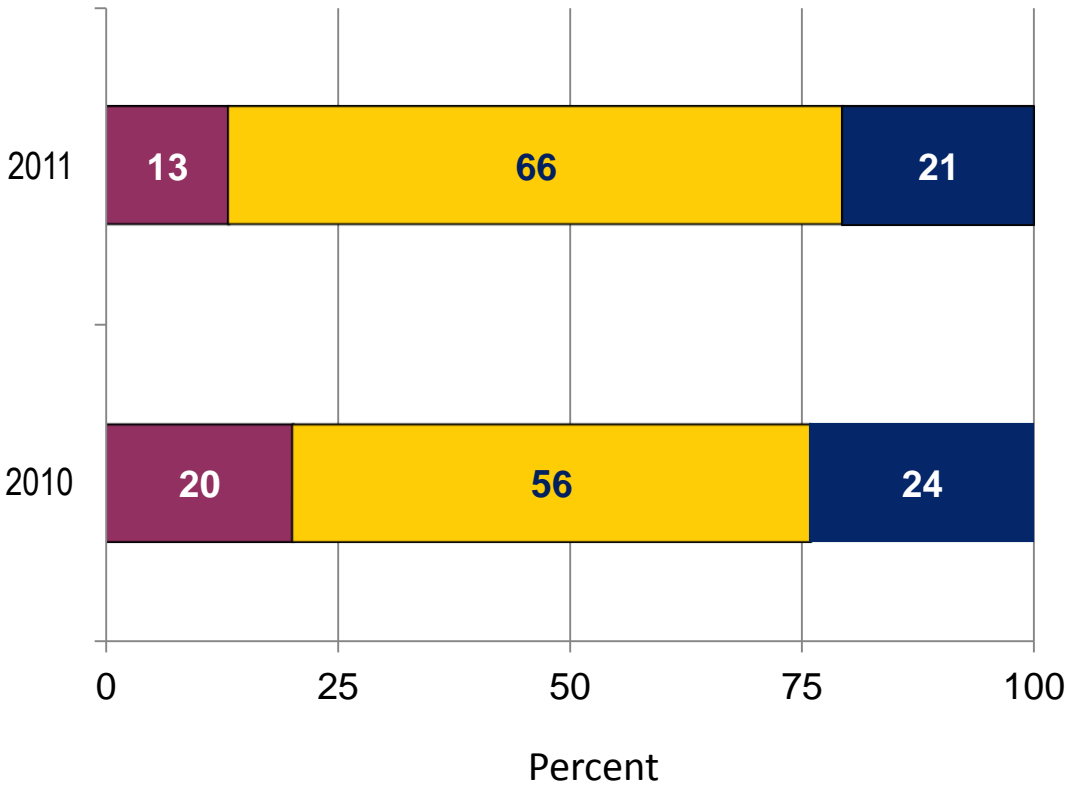


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

www.visitpa.com Influence on Visitation



Base: Overnight Marketable Trips



■ Very little Influence ■ Some Influence ■ Large Influence

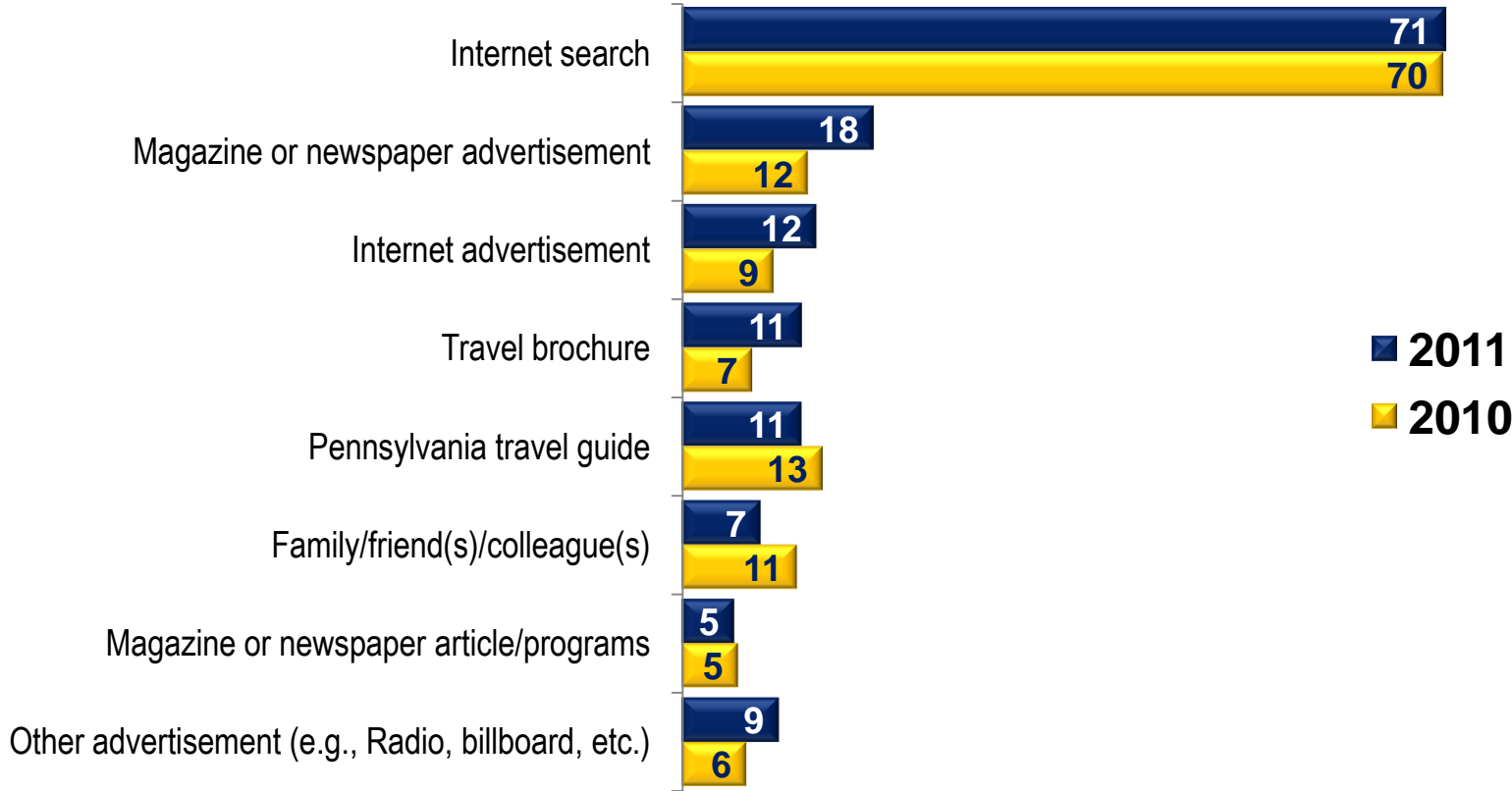
4-Pt. Scale: No Influence, Very Little Influence, Some Influence, A Large Influence

Channels to www.visitpa.com



Base: Overnight Marketable Trips

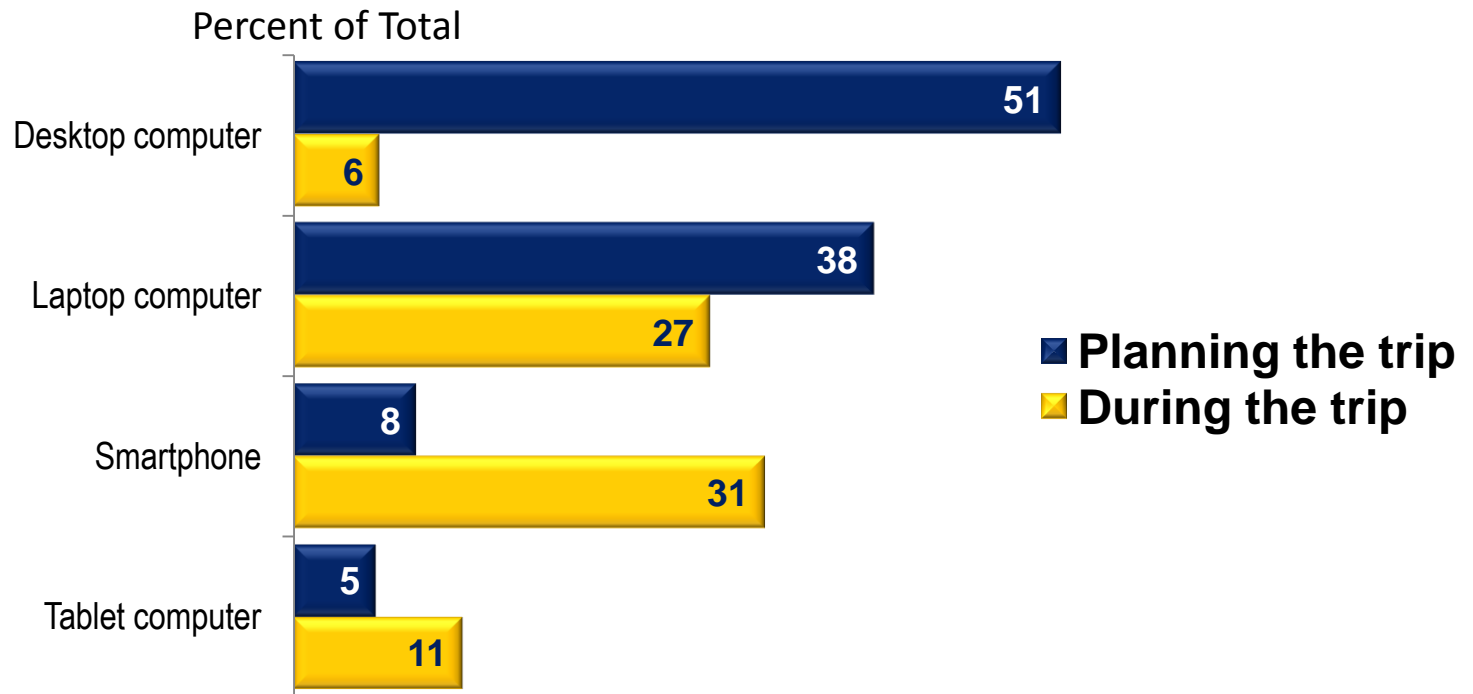
Percent of Total



Technology Used by Travelers



Base: Overnight Marketable Trips

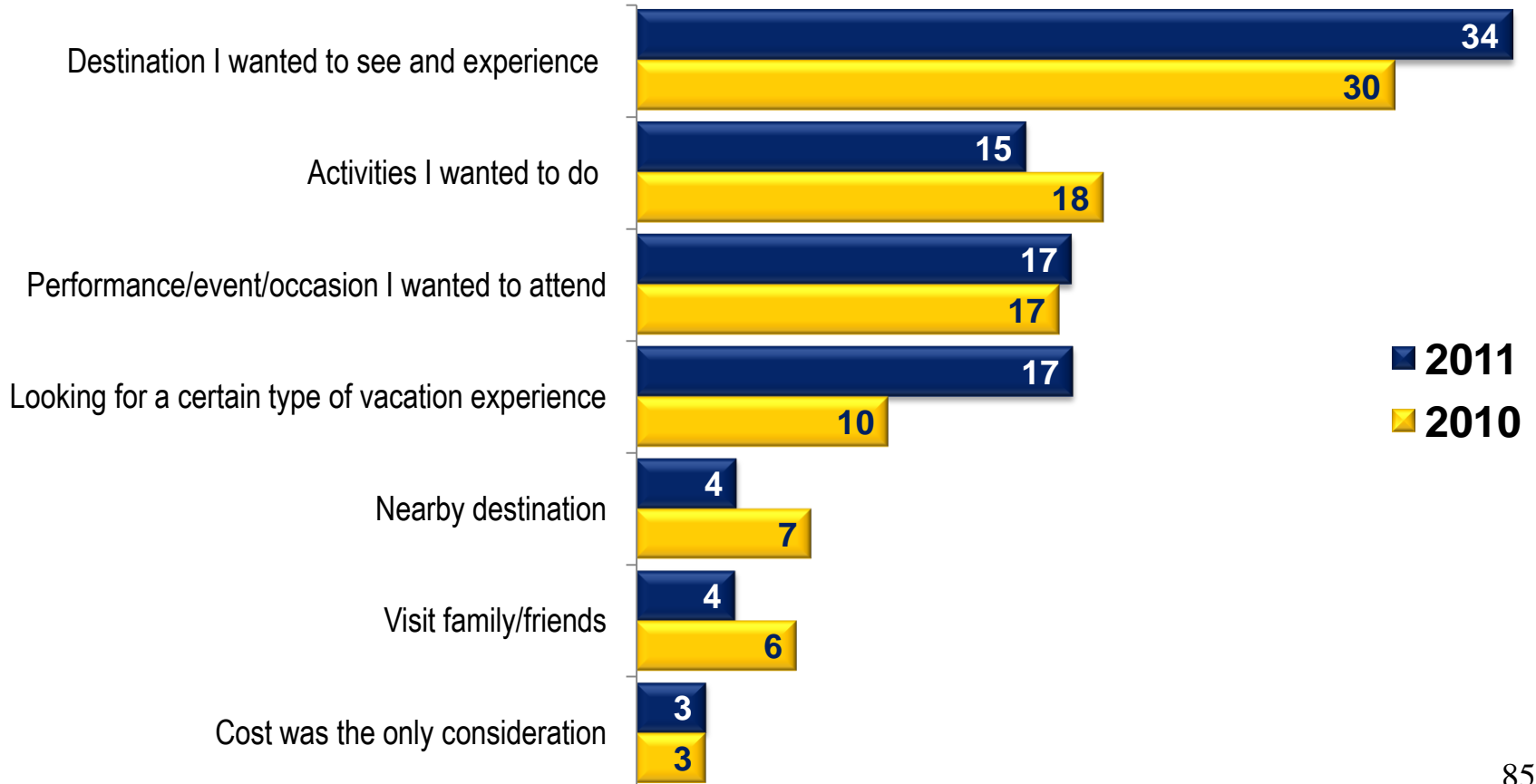


Planning Considerations Beyond Cost



Base: Overnight Marketable Trips

Percent of Total

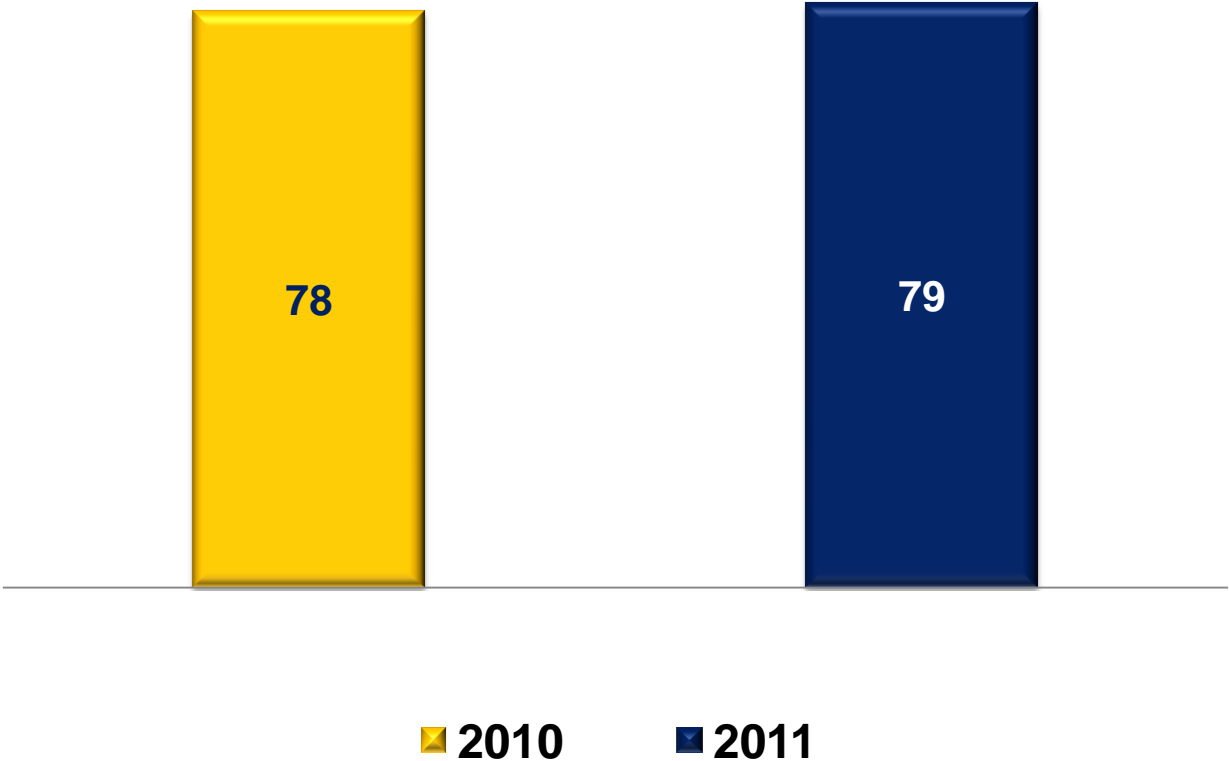


Percent of Travelers Booking In Advance



Base: Overnight Marketable Trips

Percent of Total

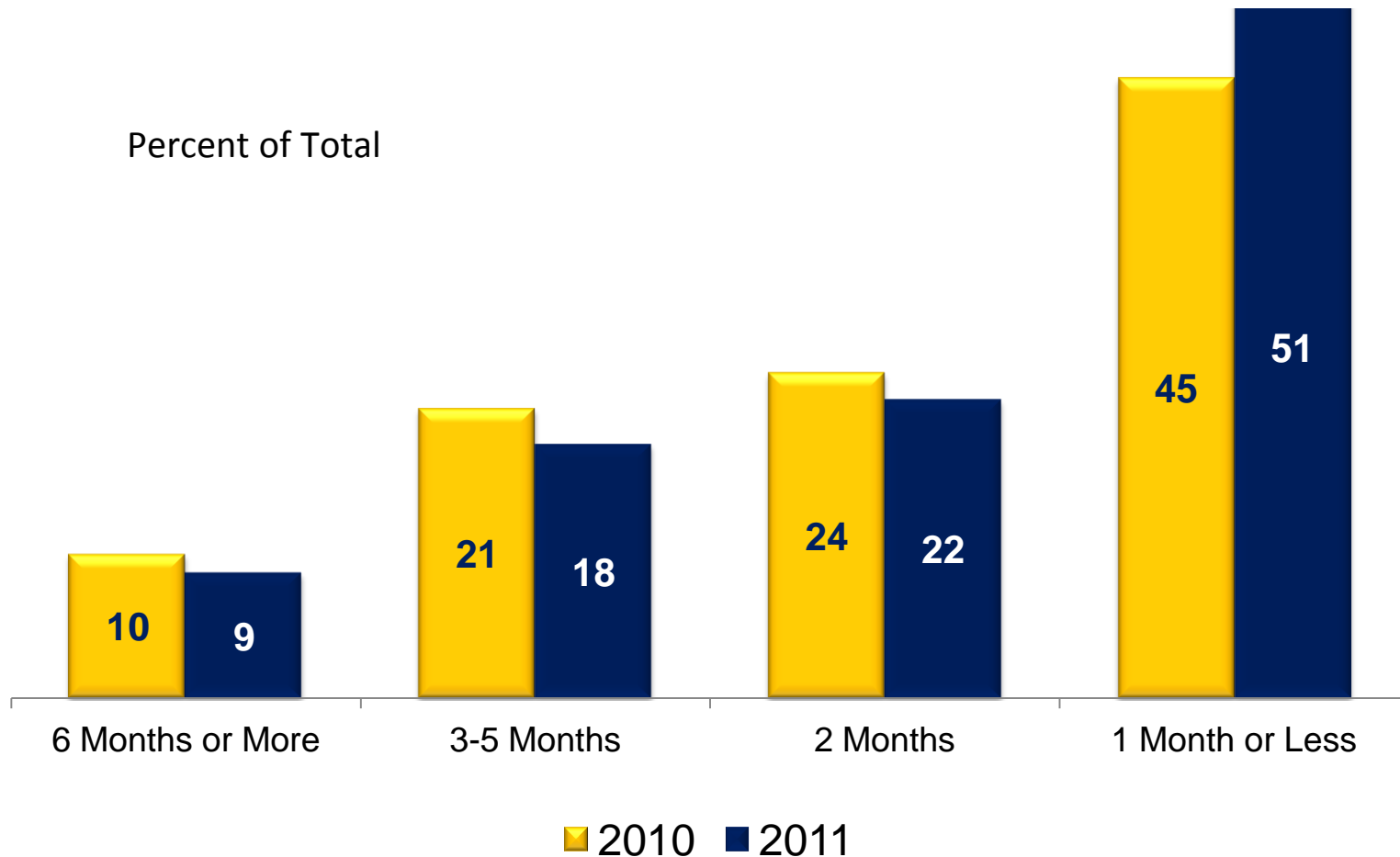


Booking Cycle



Base: Overnight Marketable Trips

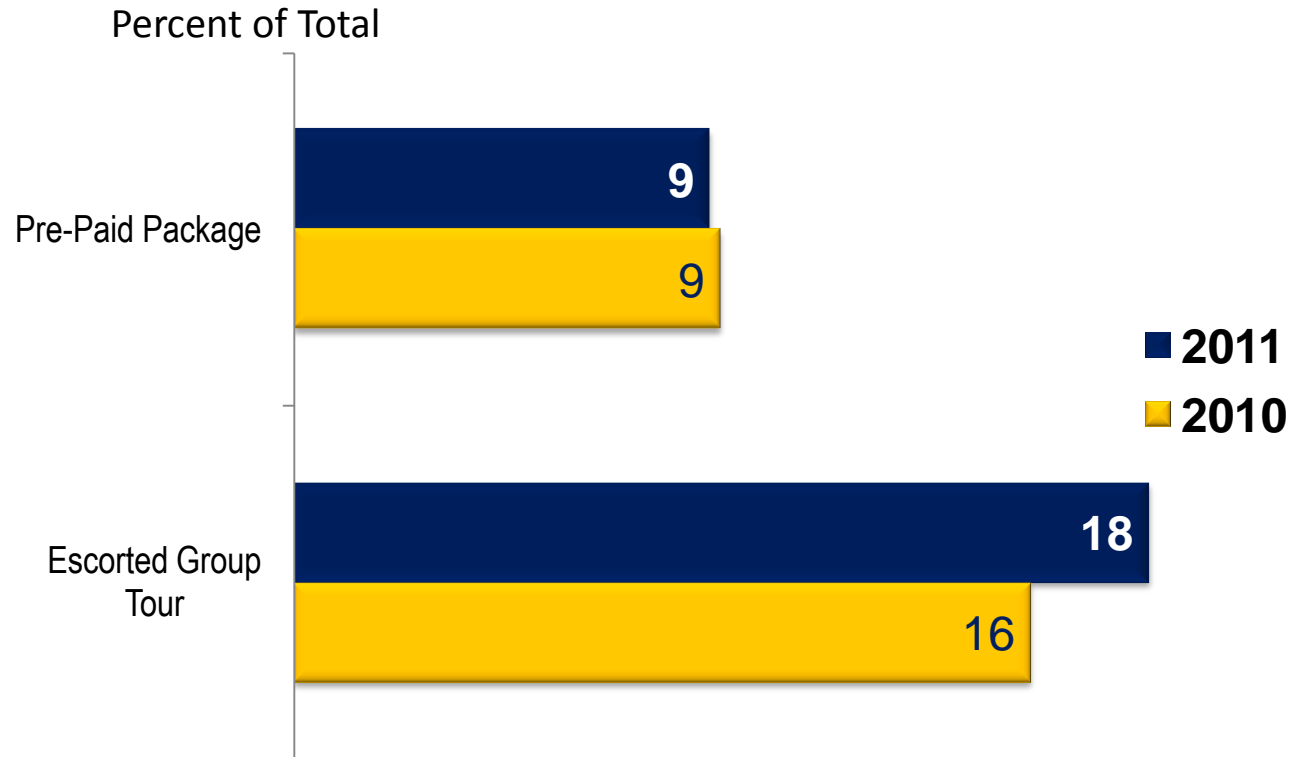
Percent of Total



Use of Vacation Packages and Group Travel



Base: Overnight Marketable Trips

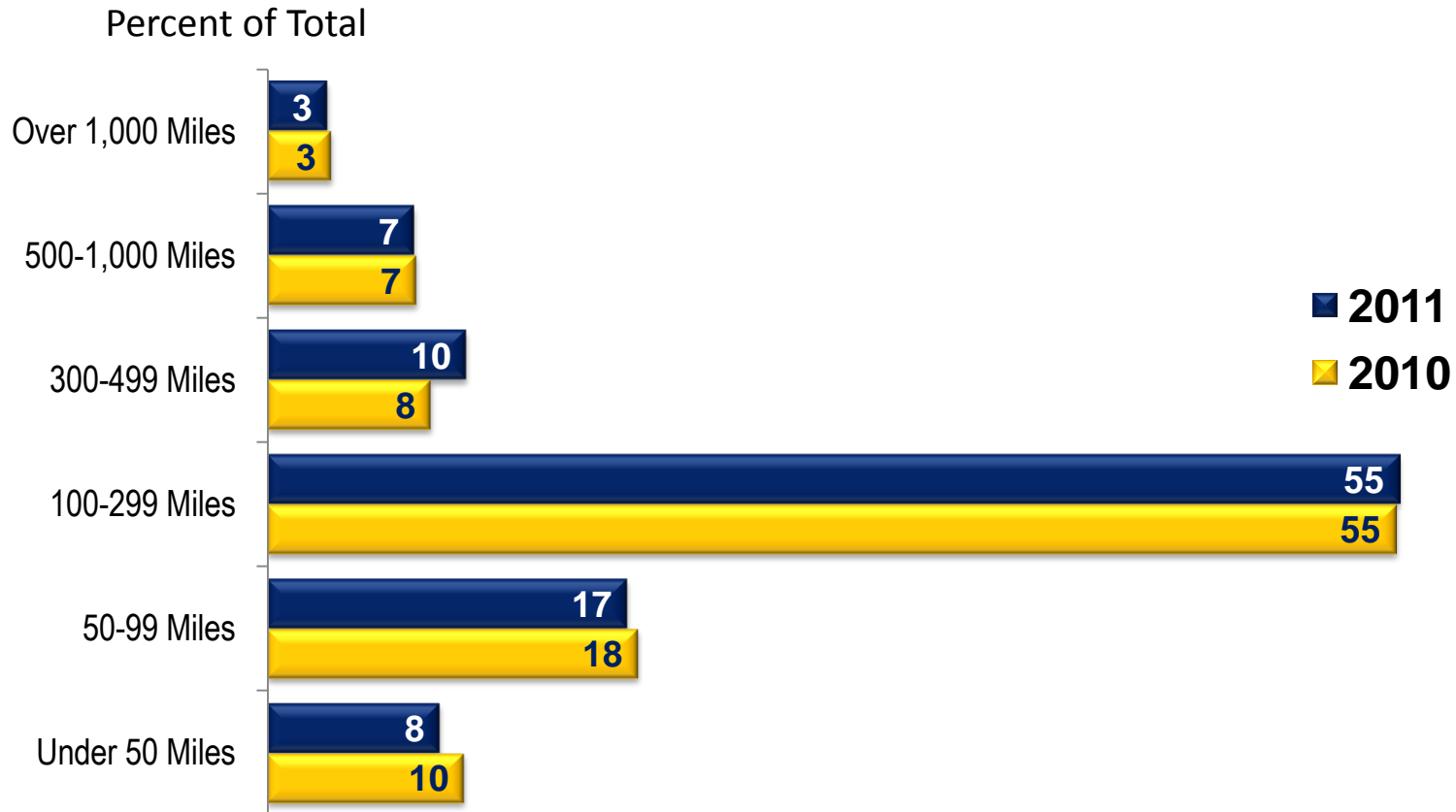


Trip Characteristics of Pennsylvania's Marketable Overnight Travelers

Distance Traveled to Pennsylvania



Base: Overnight Marketable Trips

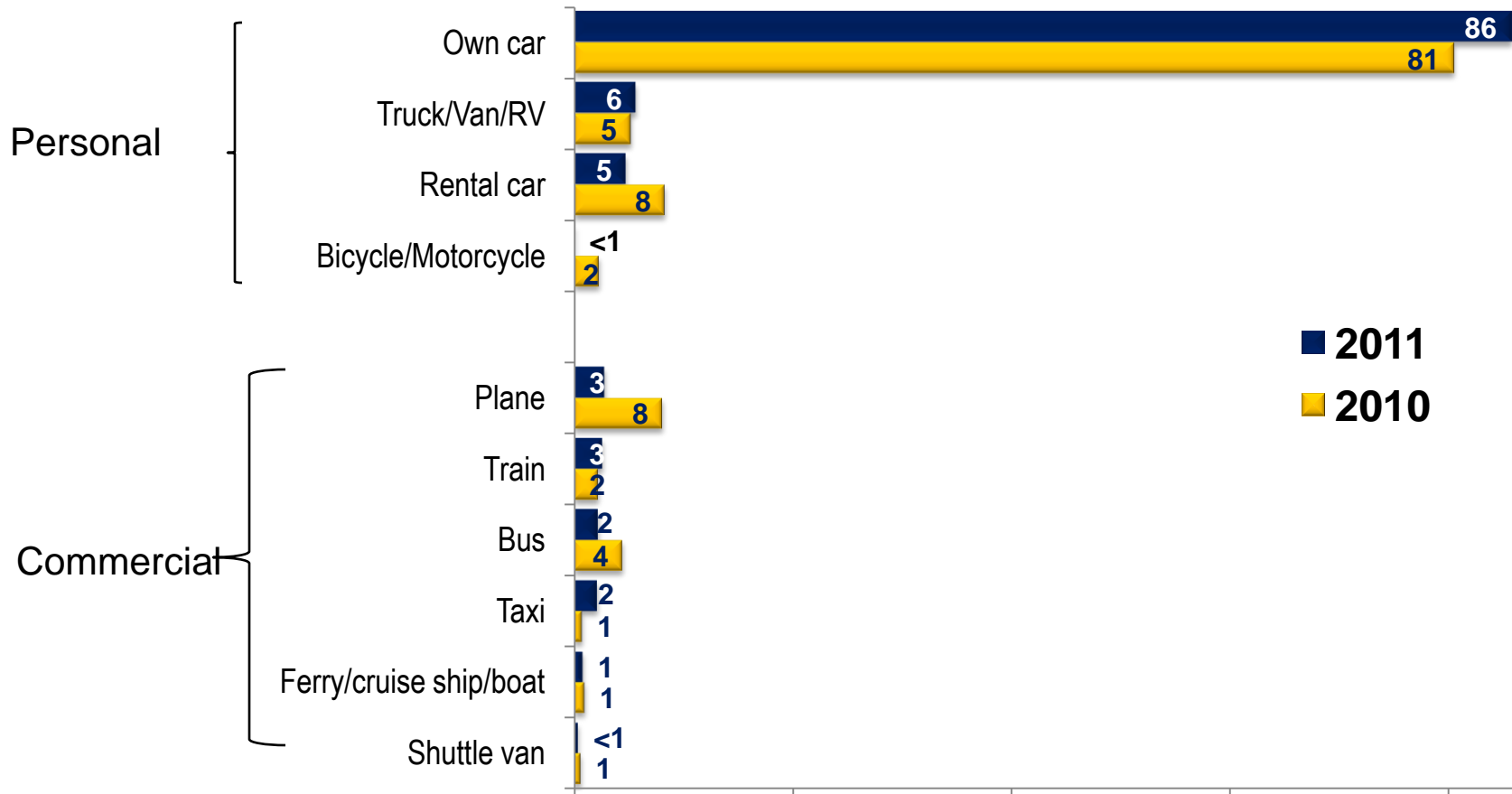


Transportation Used to Enter Pennsylvania



Base: Overnight Marketable Trips starting outside of Pennsylvania

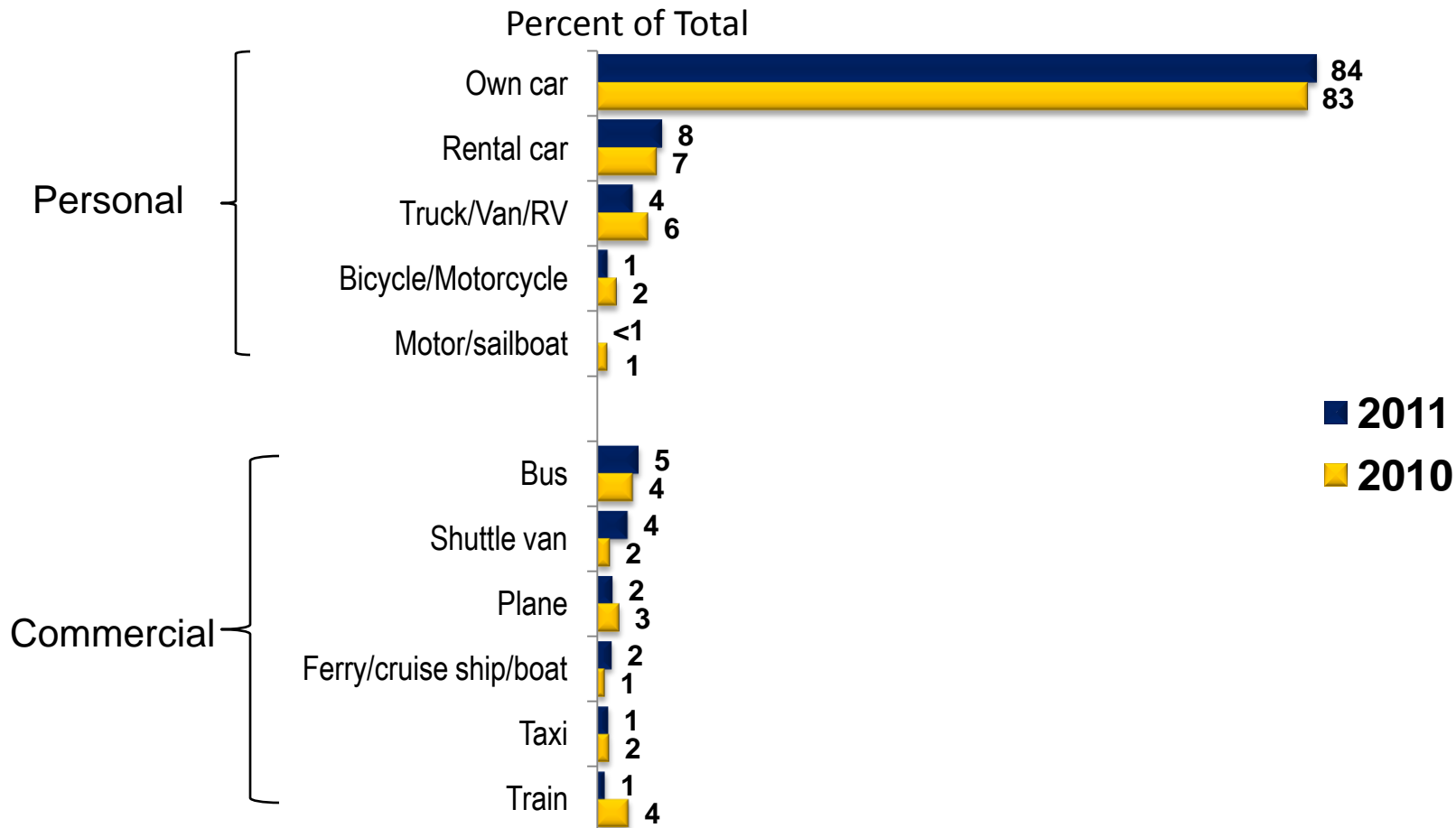
Percent of Total



Transportation Used Inside Pennsylvania



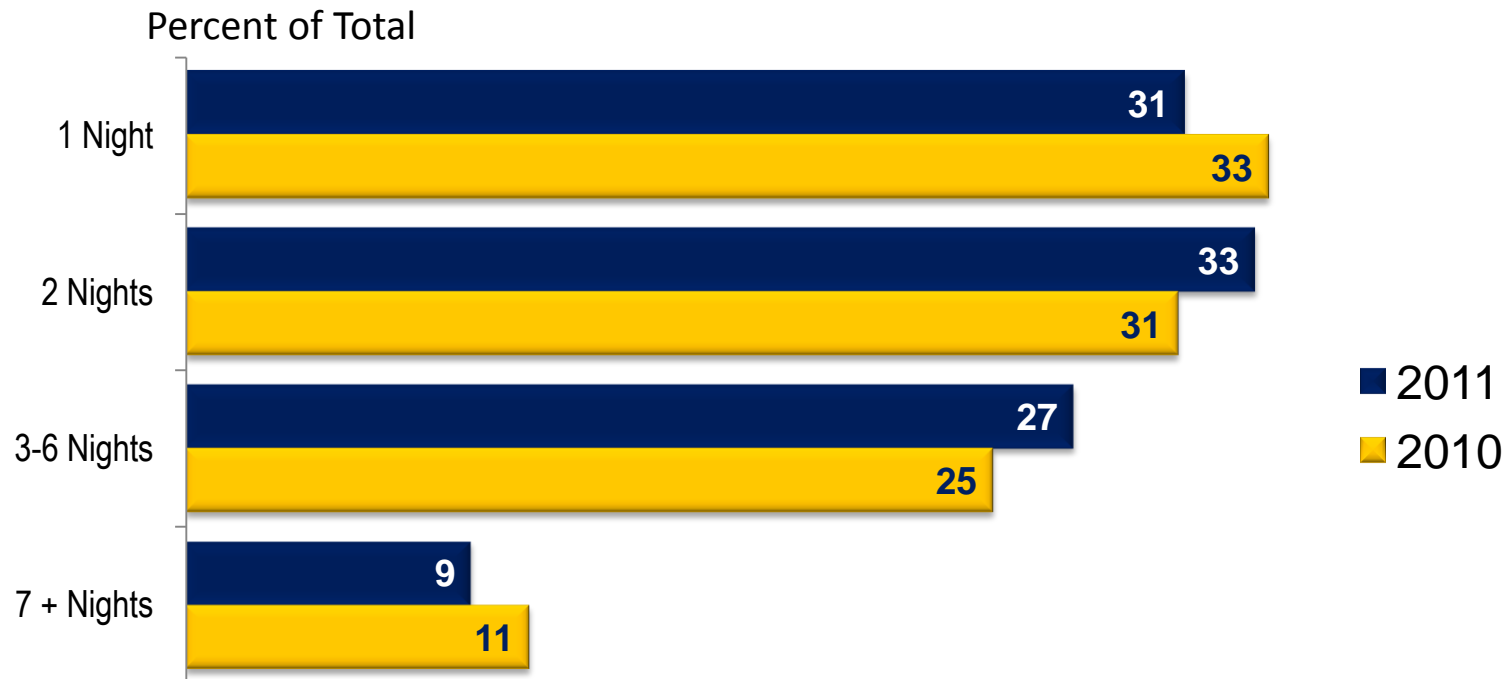
Base: Overnight Marketable Trips



Total Nights Away



Base: Overnight Marketable Trips

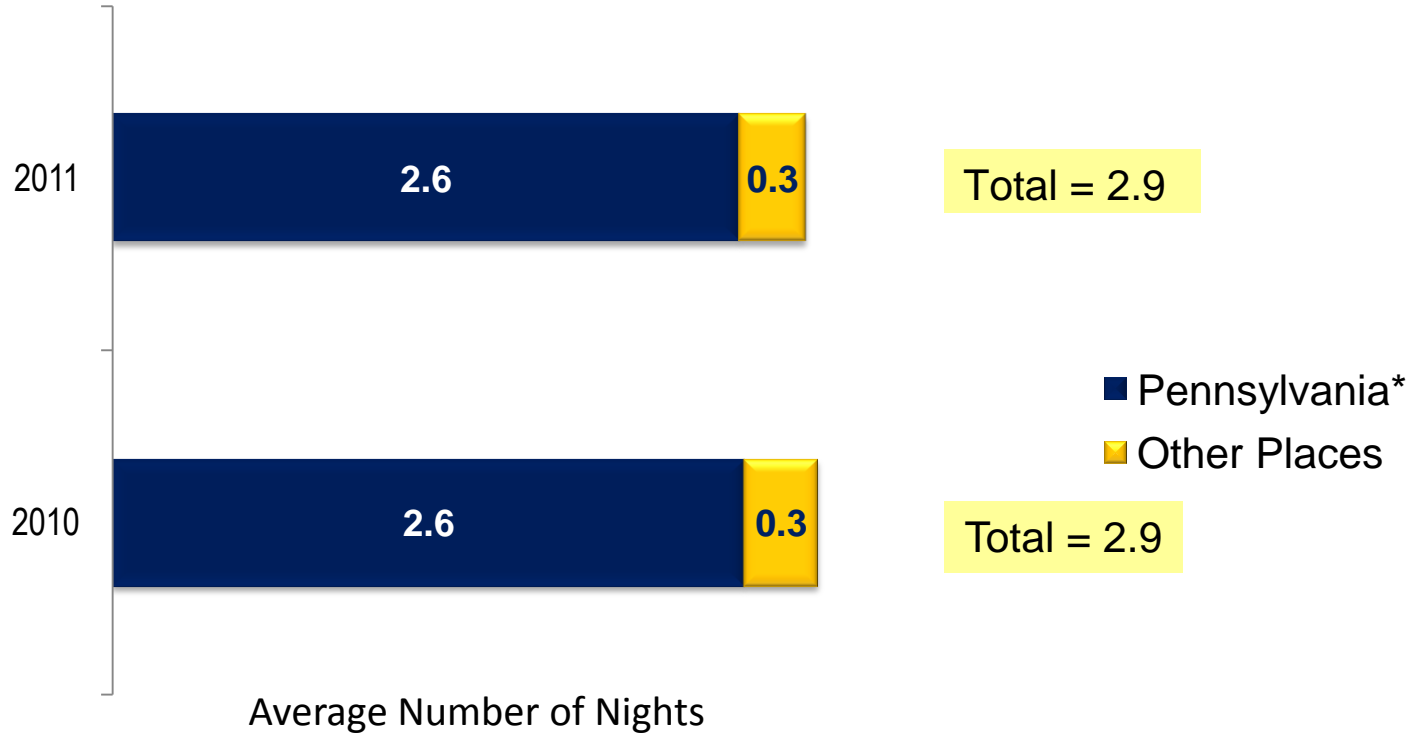


| Average Number of Nights | 2011 | 2010 |
|--------------------------|------|------|
| | 3.1 | 3.2 |

Length of Stay



Base: Overnight Marketable Trips

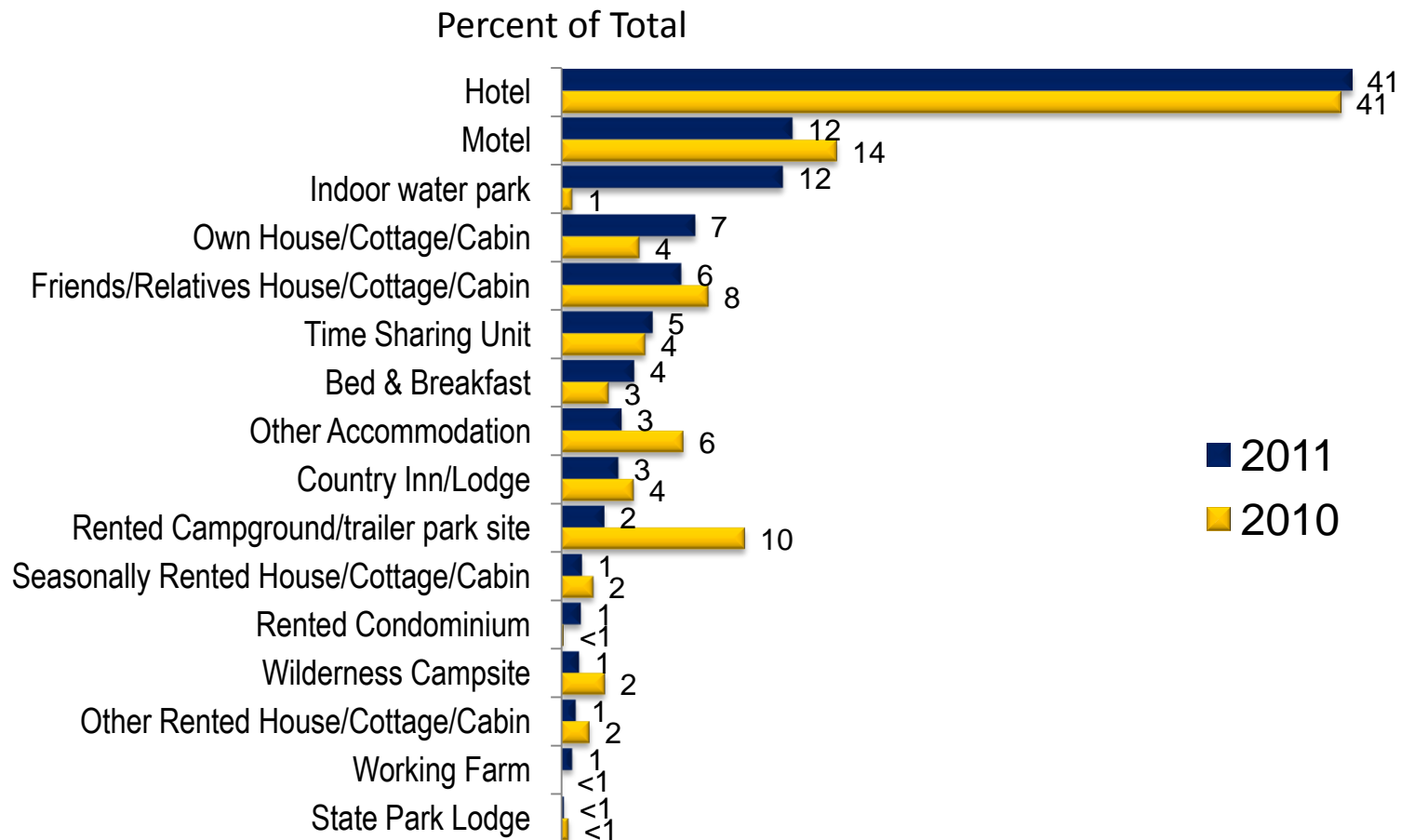


* Those who spent 1+ nights anywhere in Pennsylvania

Accommodations*



Base: Overnight Marketable Trips

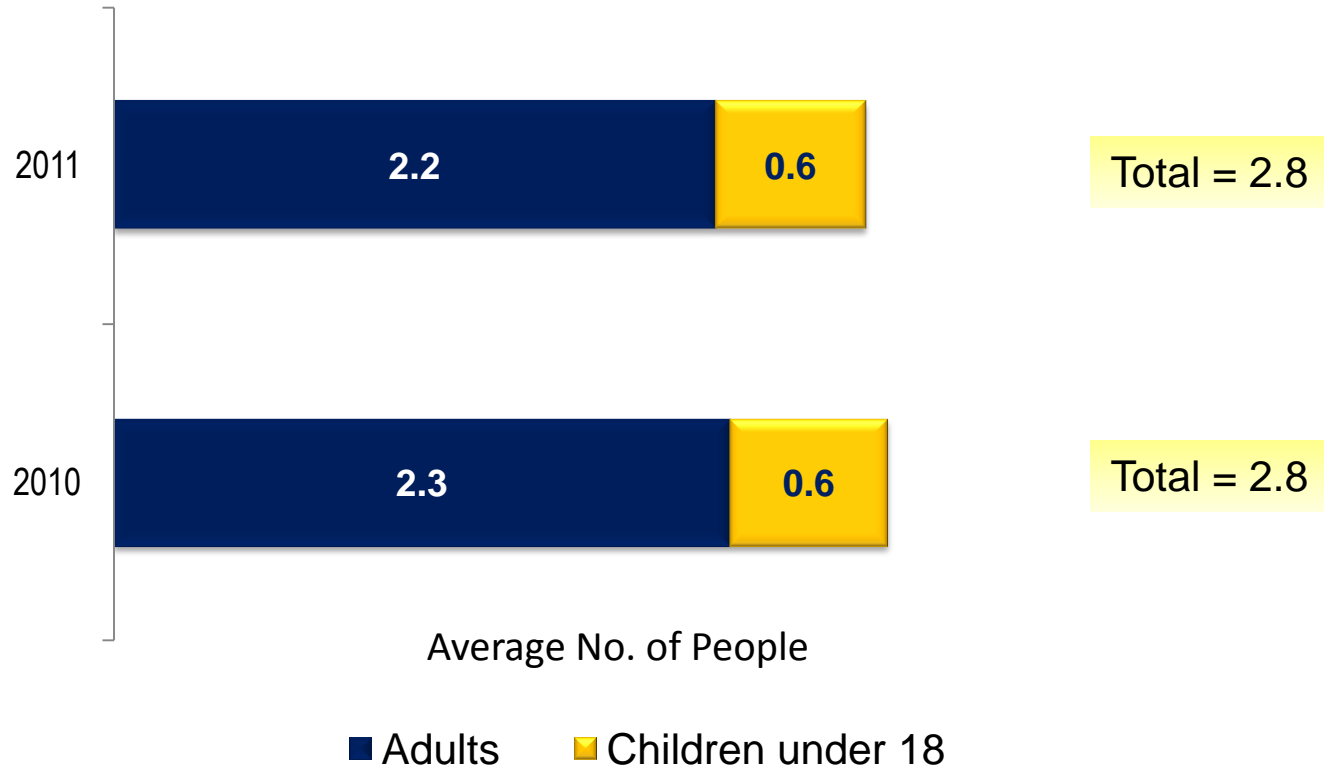


* Percent of trip nights spent in each type of accommodation

Size of Travel Party



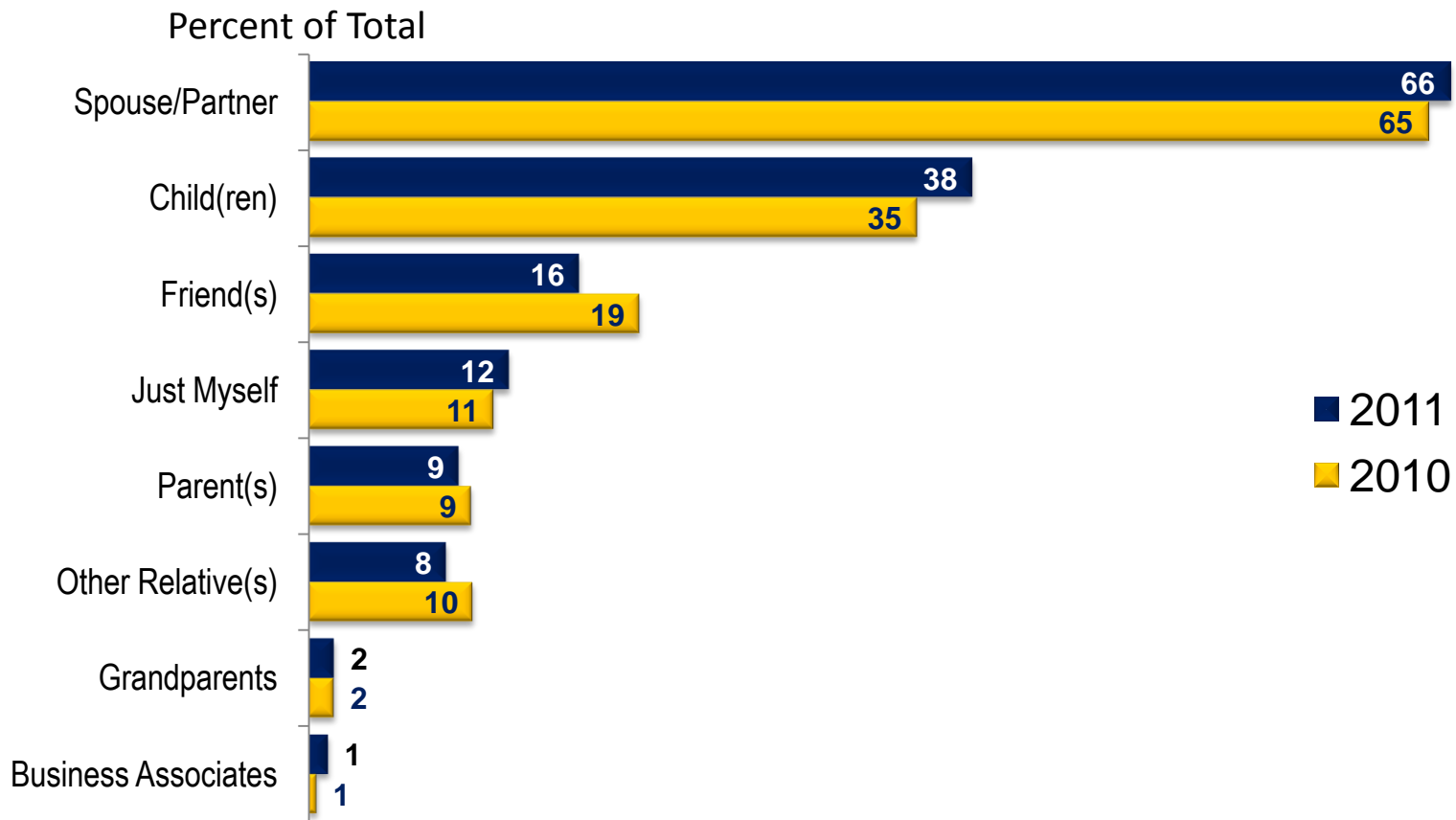
Base: Overnight Marketable Trips



Composition of Travel Party



Base: Overnight Marketable Trips

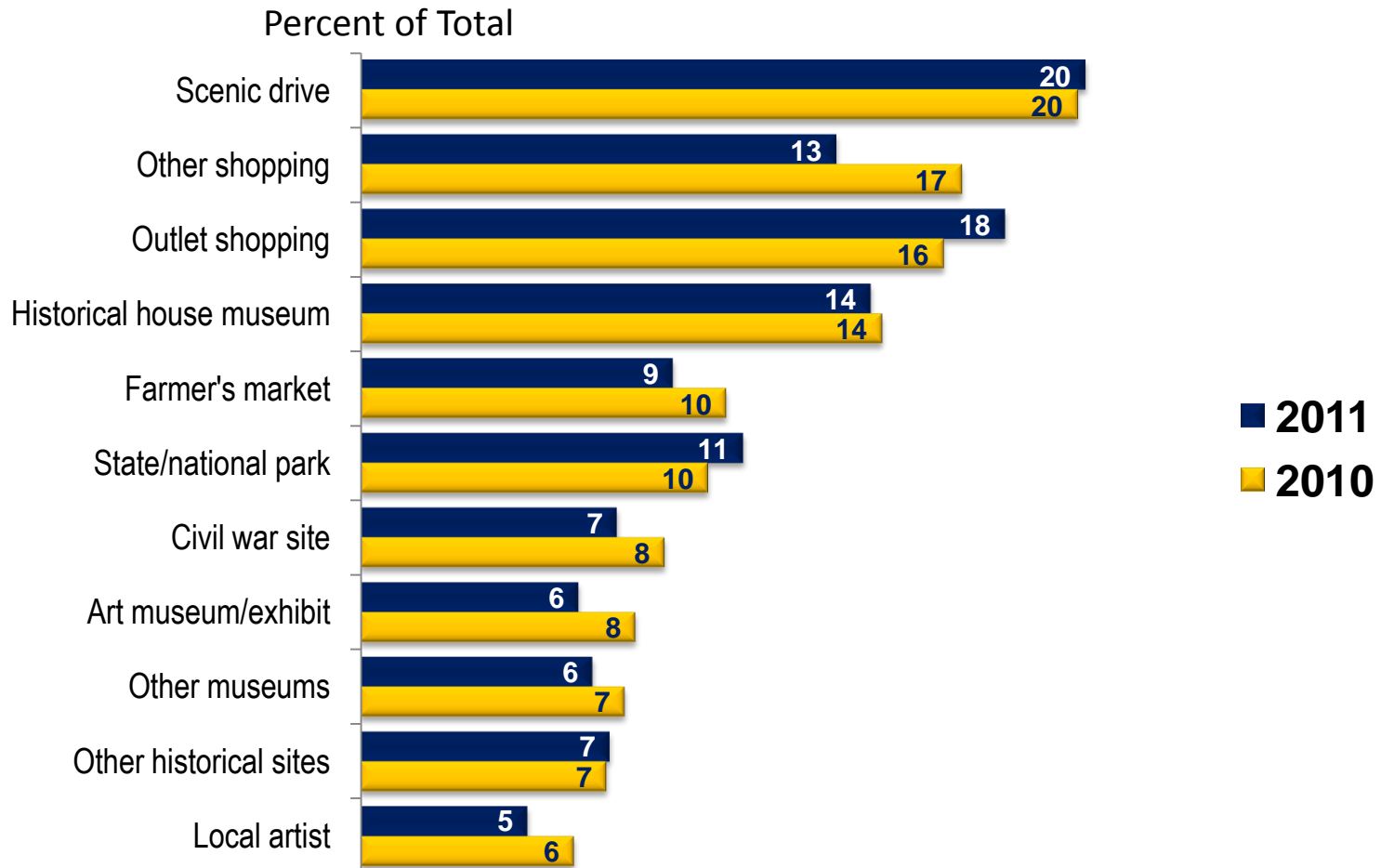


Trip Experiences — Overnight Marketable Trips

Things Seen and Experienced on Trip



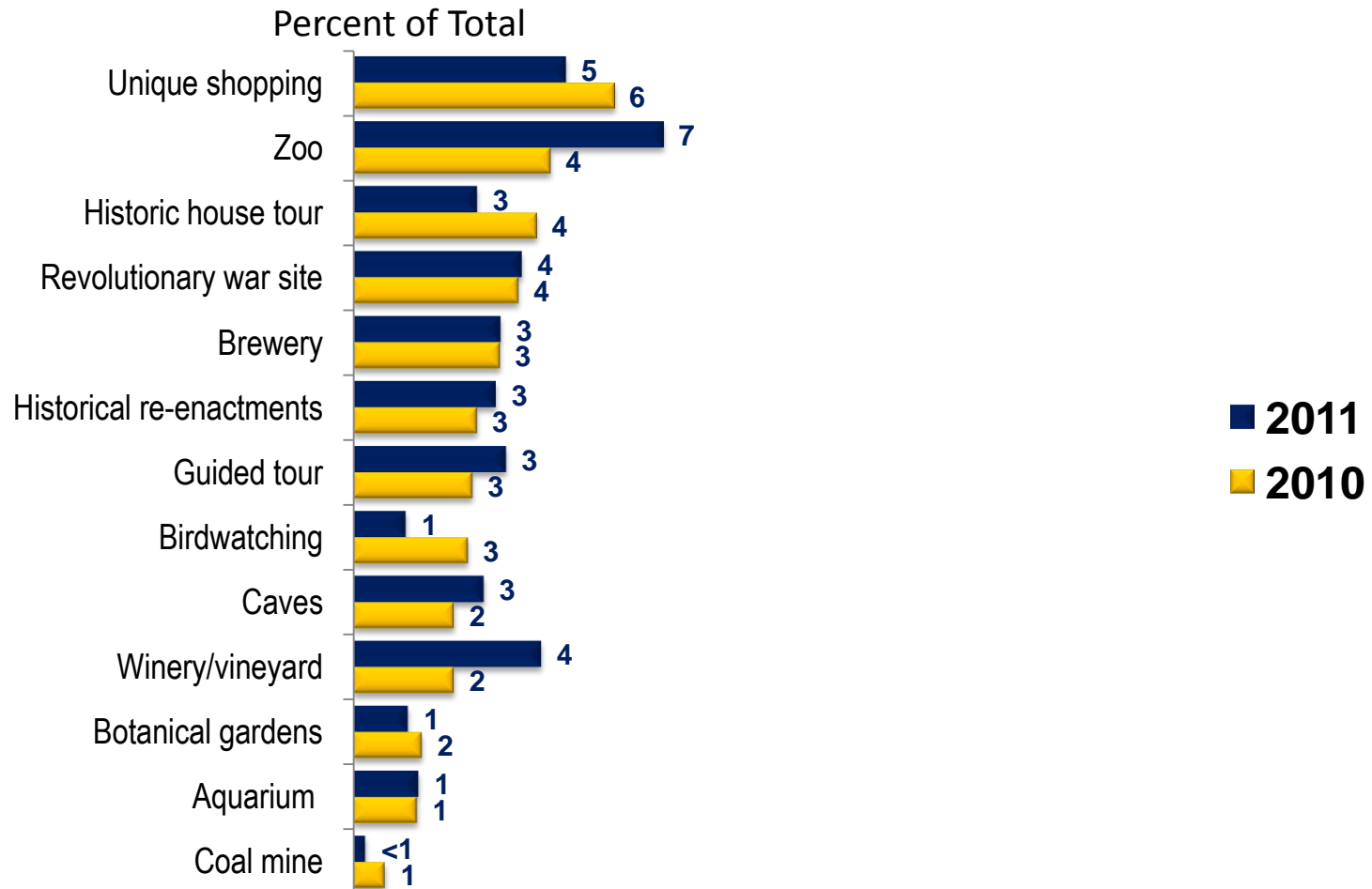
Base: Overnight Marketable Trips



Things Seen and Experienced on Trip (cont'd)



Base: Overnight Marketable Trips

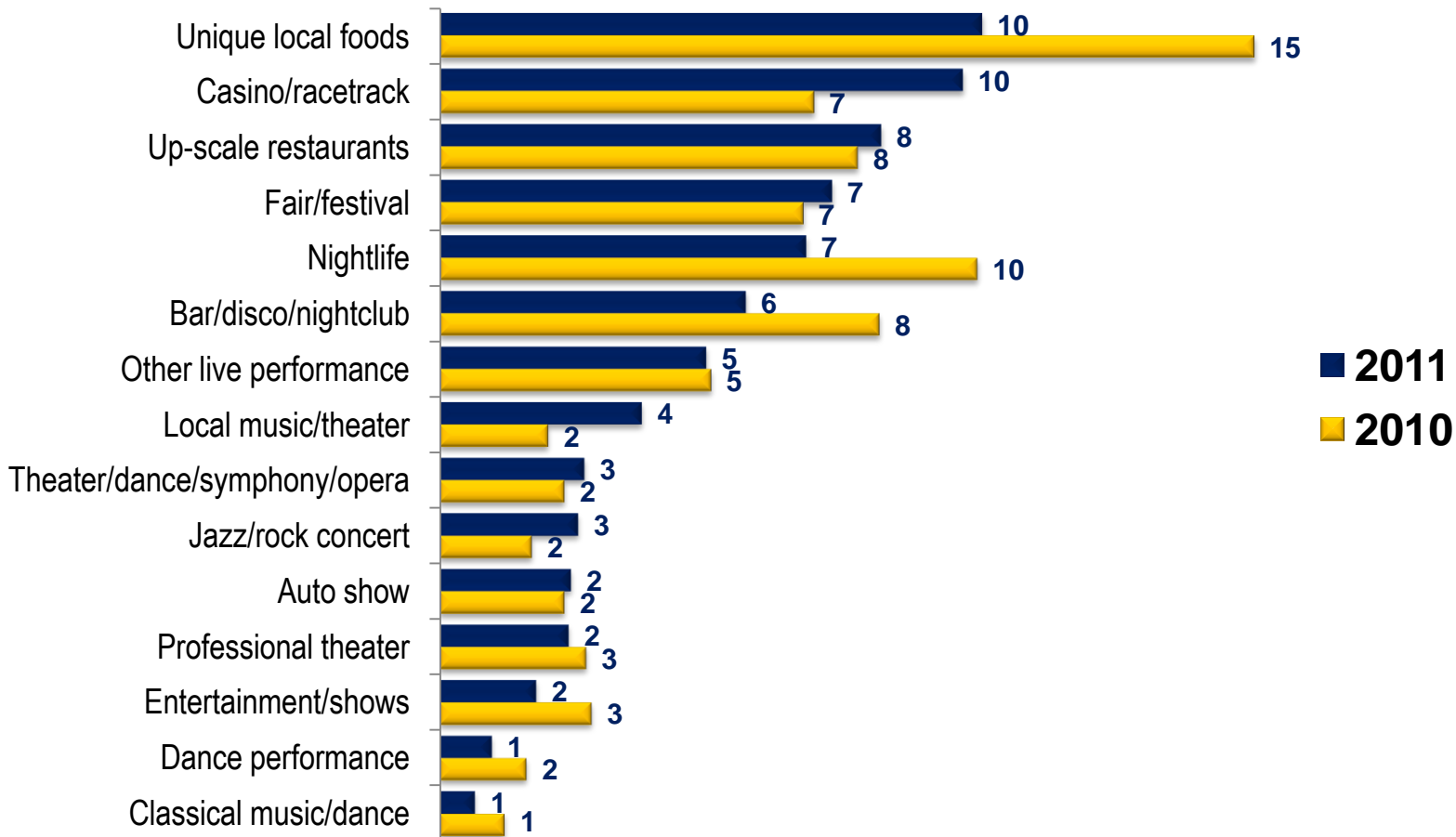


Dining/Entertainment



Base: Overnight Marketable Trips

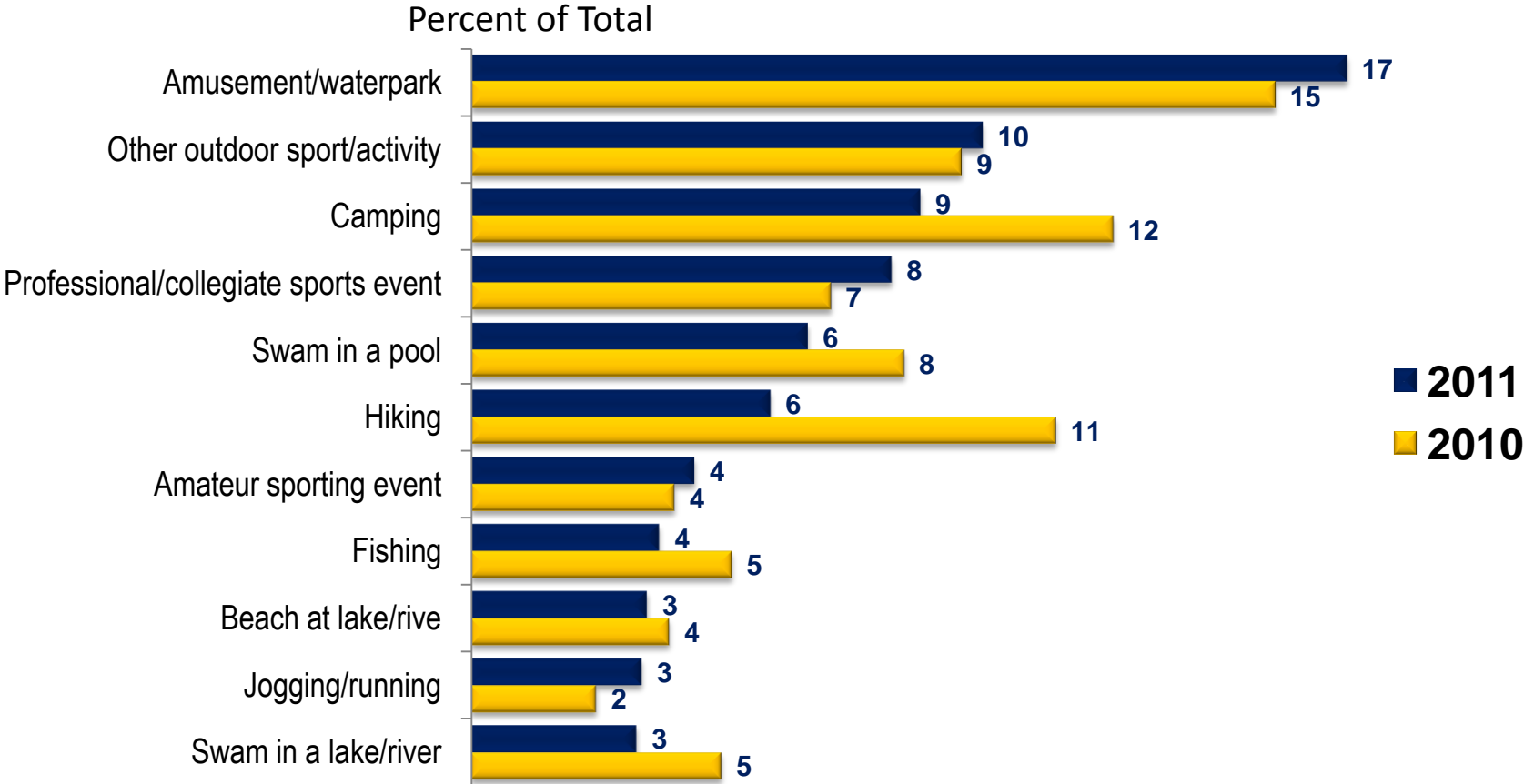
Percent of Total



Sports and Recreation



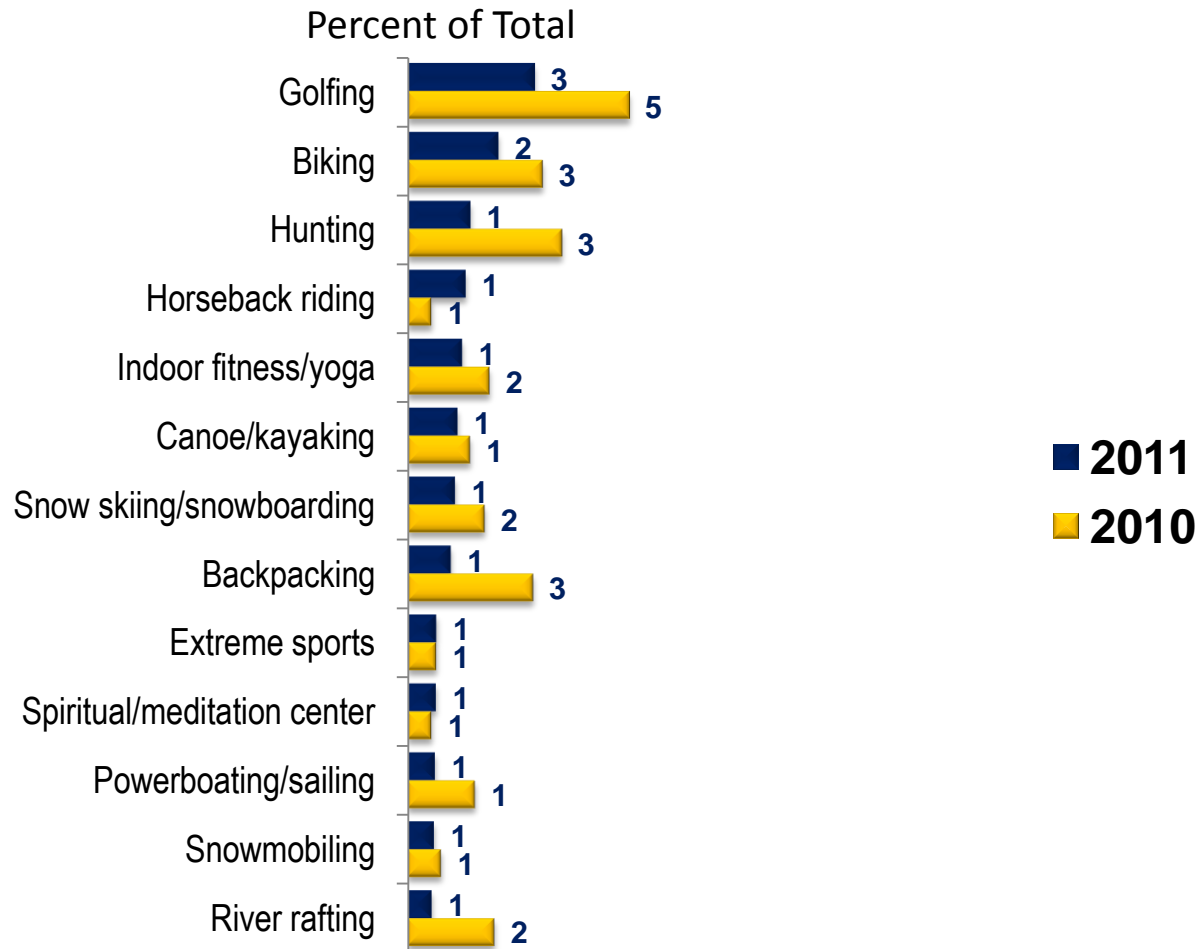
Base: Overnight Marketable Trips



Sports and Recreation (cont'd)



Base: Overnight Marketable Trips



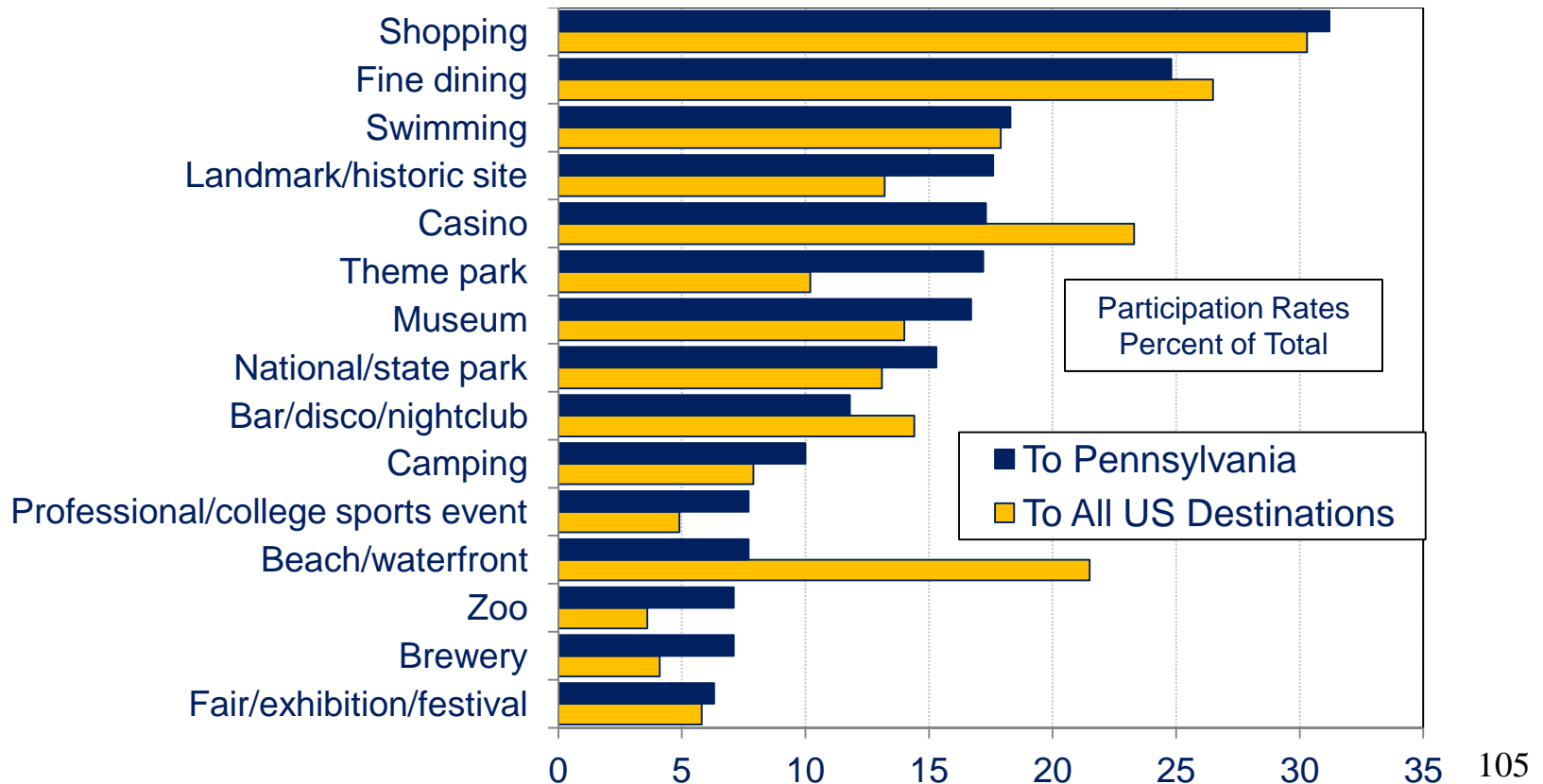
Activities by Origin Market of Marketable Overnight Travelers

Main Activities of Travelers from New York on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

Pennsylvania has a distinct advantage over other US destinations in attracting NY travelers interested in theme parks, historic sites, and zoos.

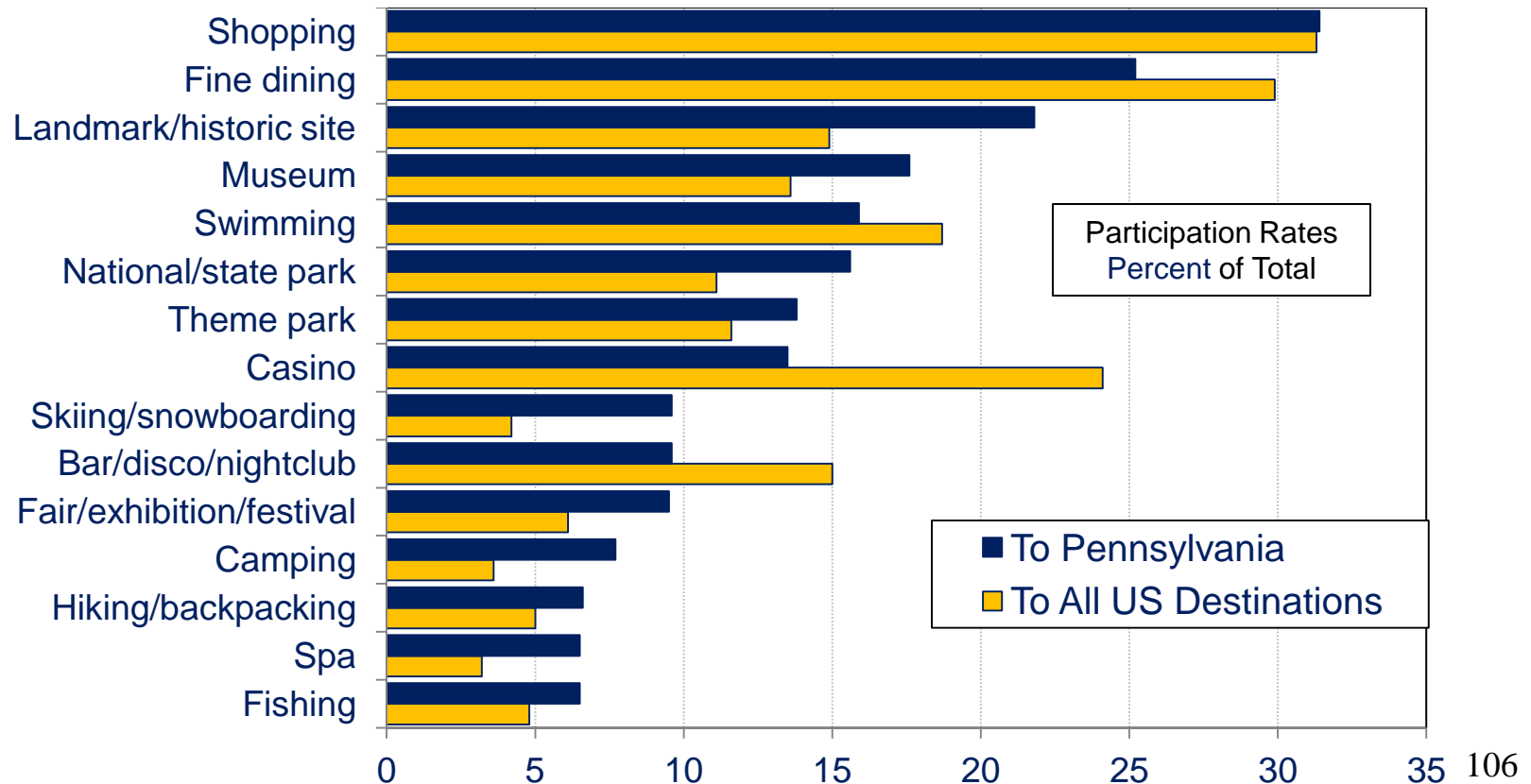


Main Activities of Travelers from New Jersey on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

Pennsylvania has an advantage over other US destinations in attracting NJ travelers interested in historic sites, museums, outdoor activities, and national/state parks.

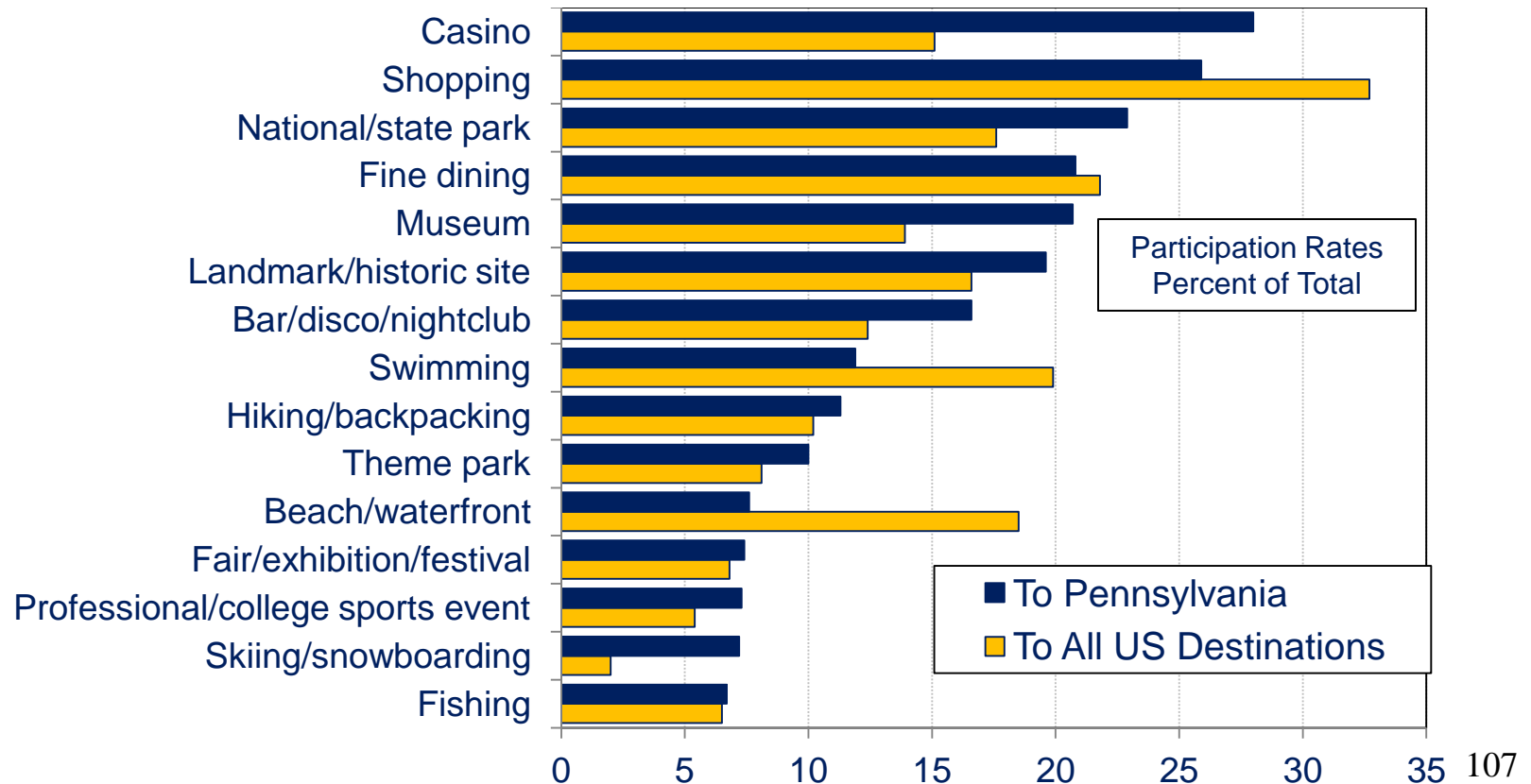


Main Activities of Travelers from Ohio on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

Pennsylvania has an advantage over other US destinations in attracting travelers from Ohio interested in casinos, museums, national/state parks, sports events, and night life.

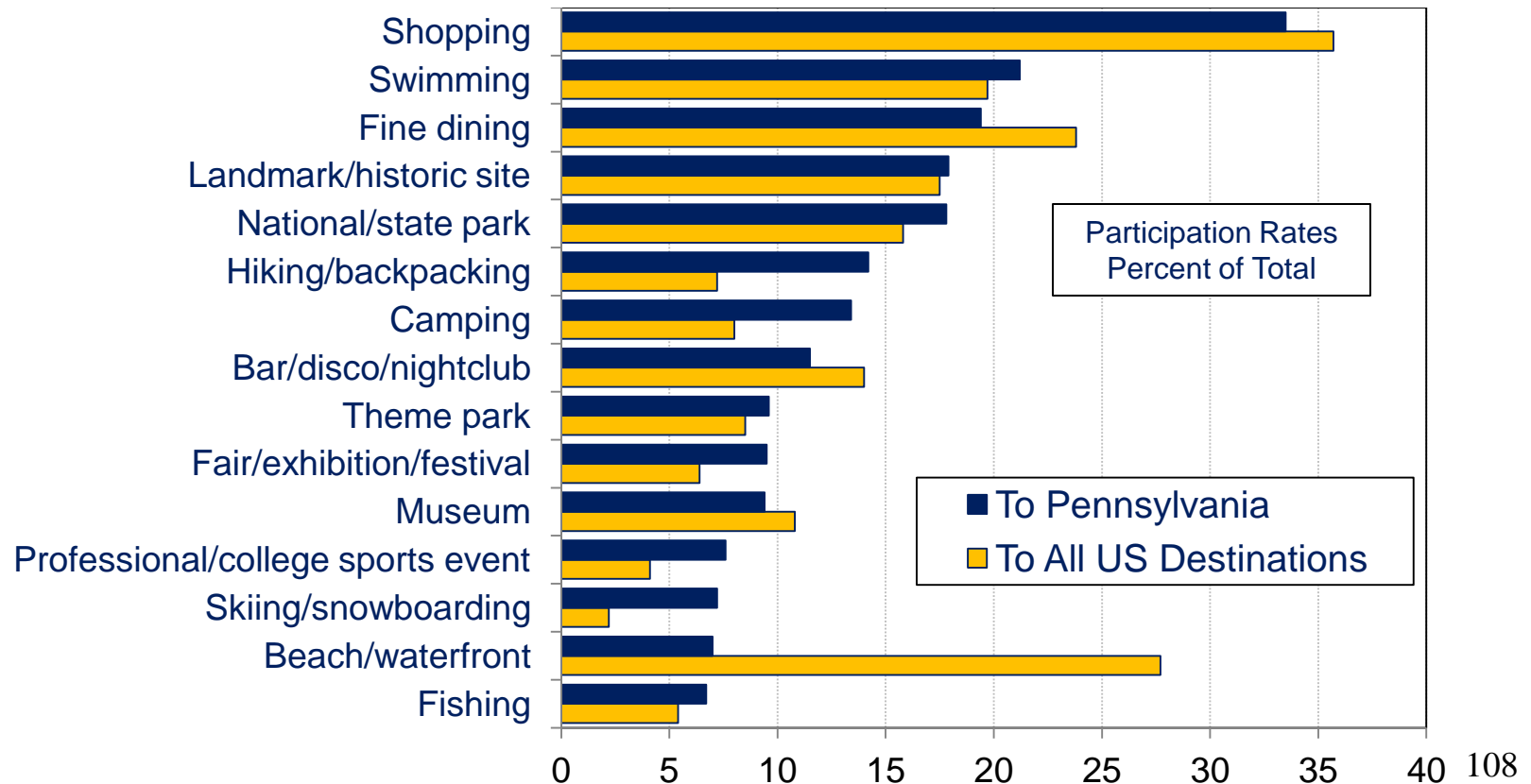


Main Activities of Travelers from Maryland on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

Pennsylvania has an advantage over other US destinations in attracting travelers from Maryland interested in outdoor activities, sports events, and fair/exhibition/festivals.

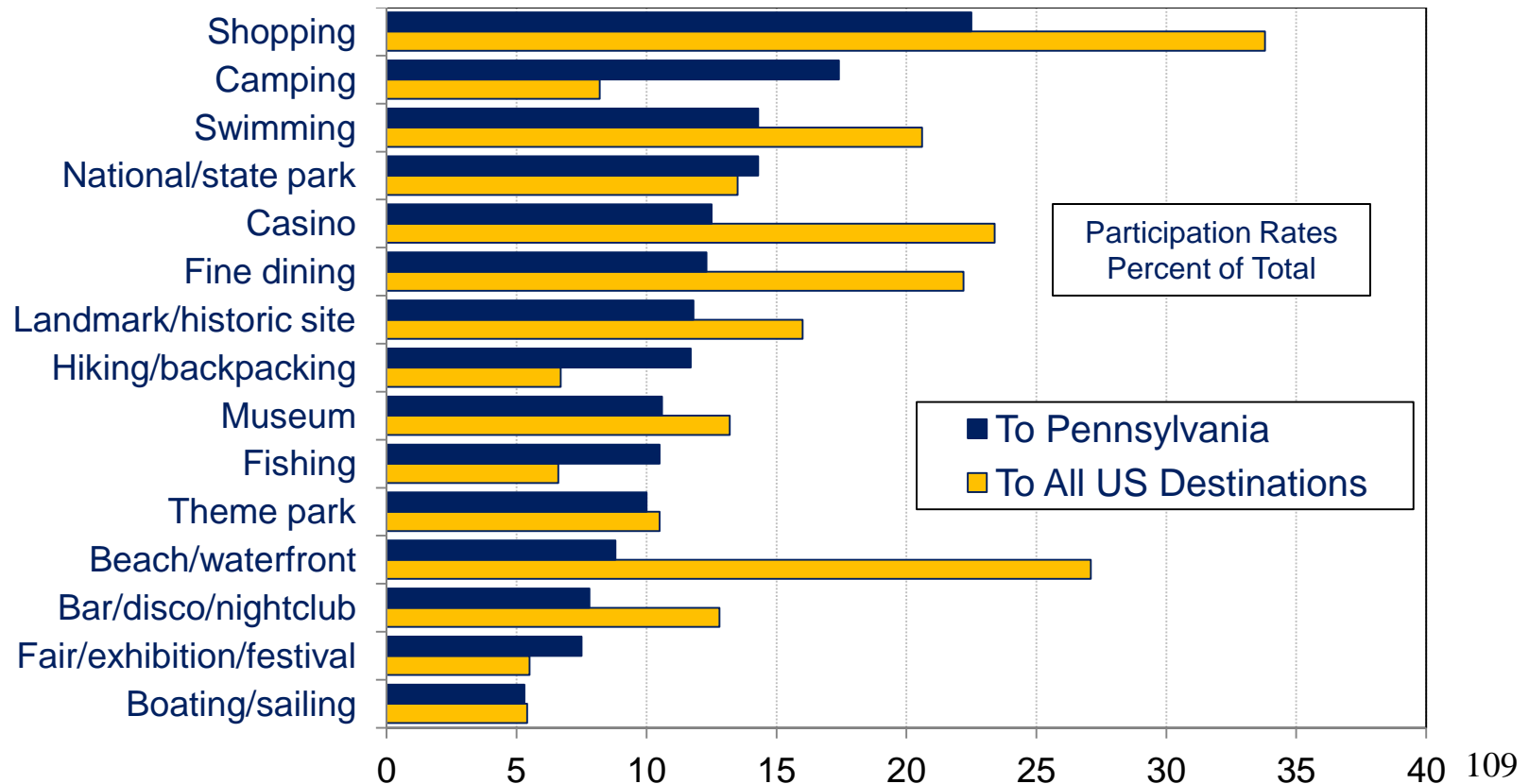


Main Activities of Travelers from Pennsylvania on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

Pennsylvania's outdoor recreational opportunities are a big draw for the state's resident travelers.



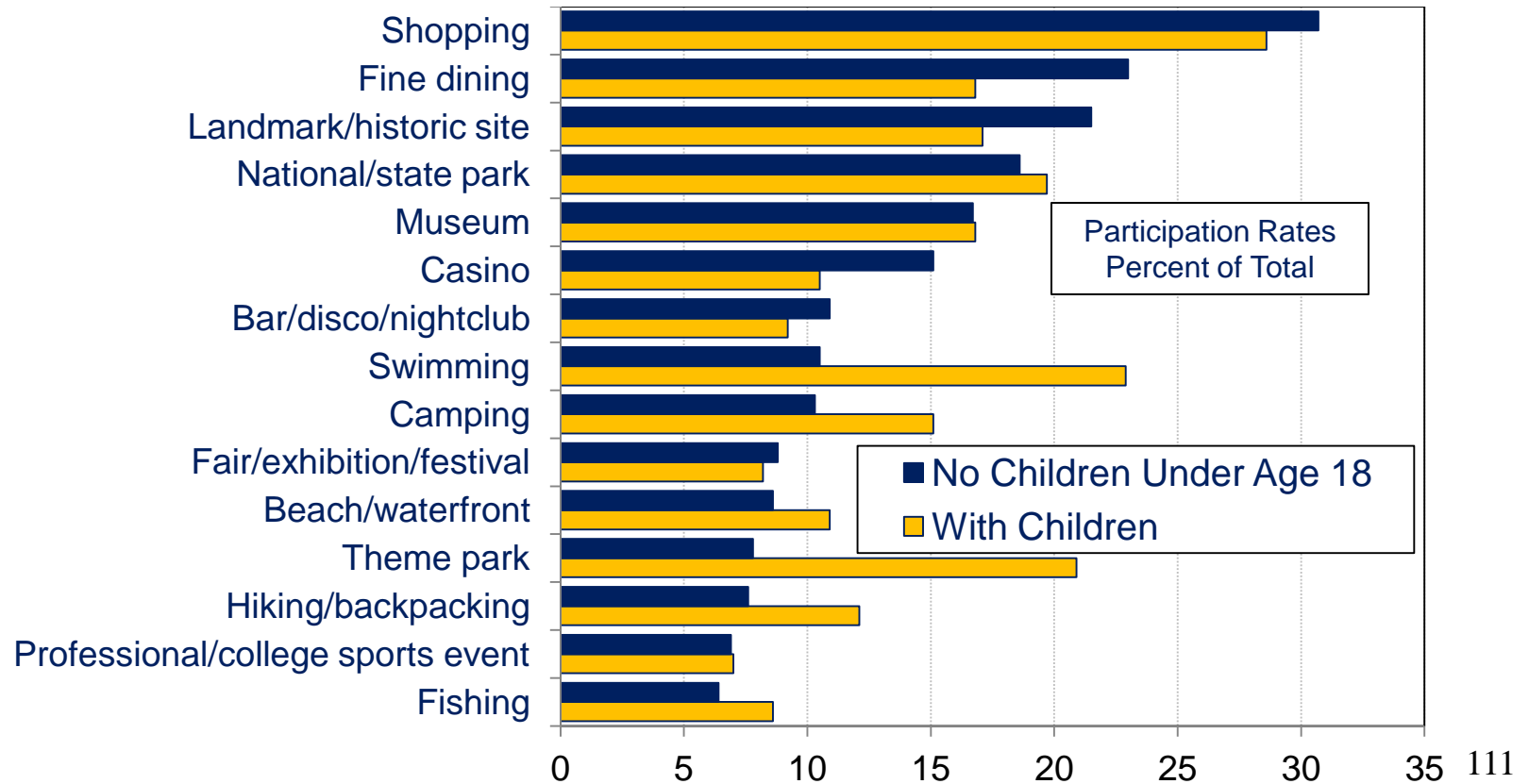
Activities by Presence/Absence of Children in Travelers' Household

Main Activities of Travelers to Pennsylvania on Marketable Overnight Trips With Children and Without Children



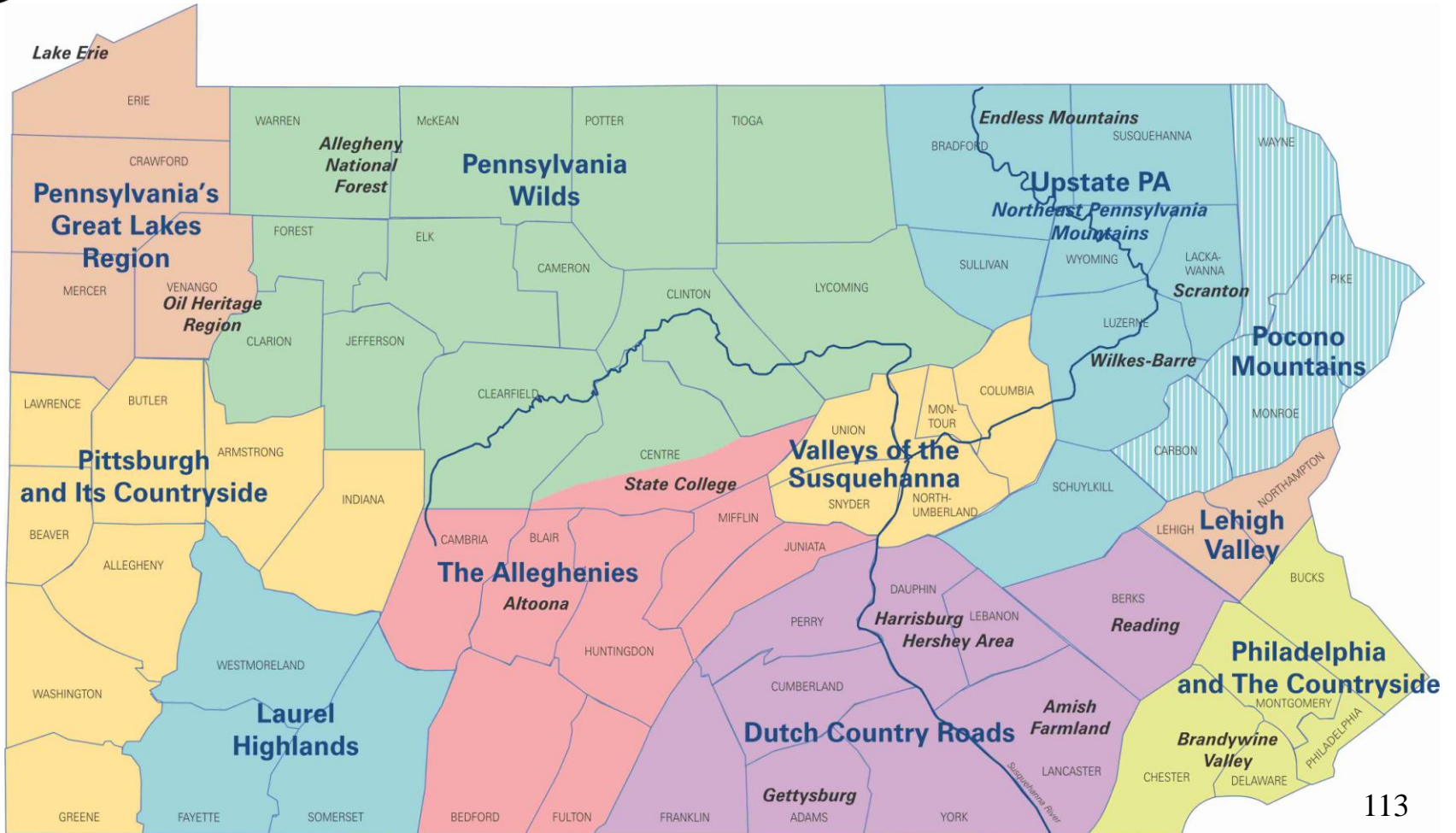
Base: Overnight Marketable Trips

Travelers with children are far more likely to visit a theme park or participate in outdoor activities, while those without children are more likely to visit fine dining, a casino, and historic sites.



**Regional Attractions Visited
2011 Marketable Overnight Trips**

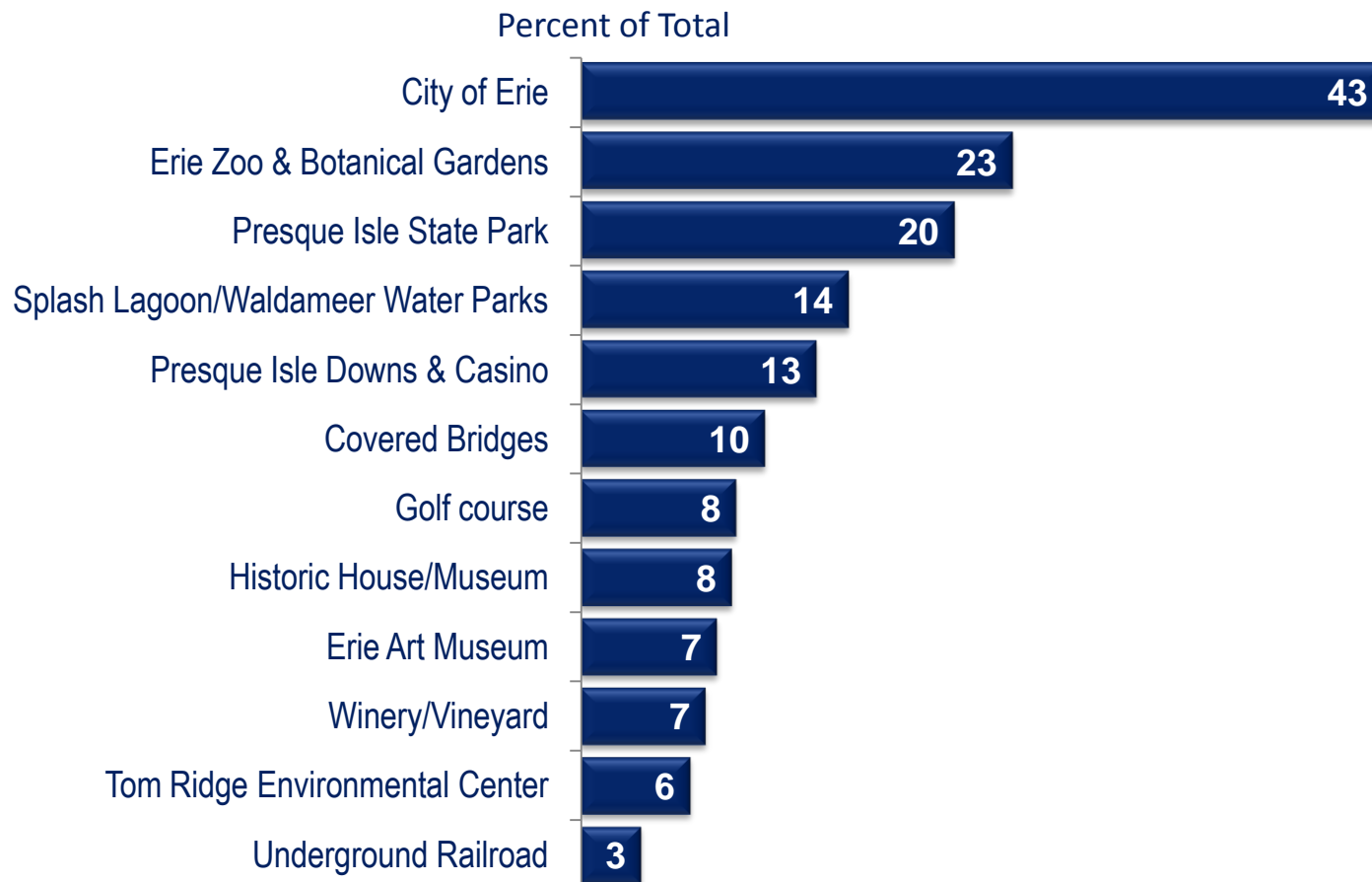
Pennsylvania Regional Map



Pennsylvania Attractions/Events — Pennsylvania's Great Lakes Region*



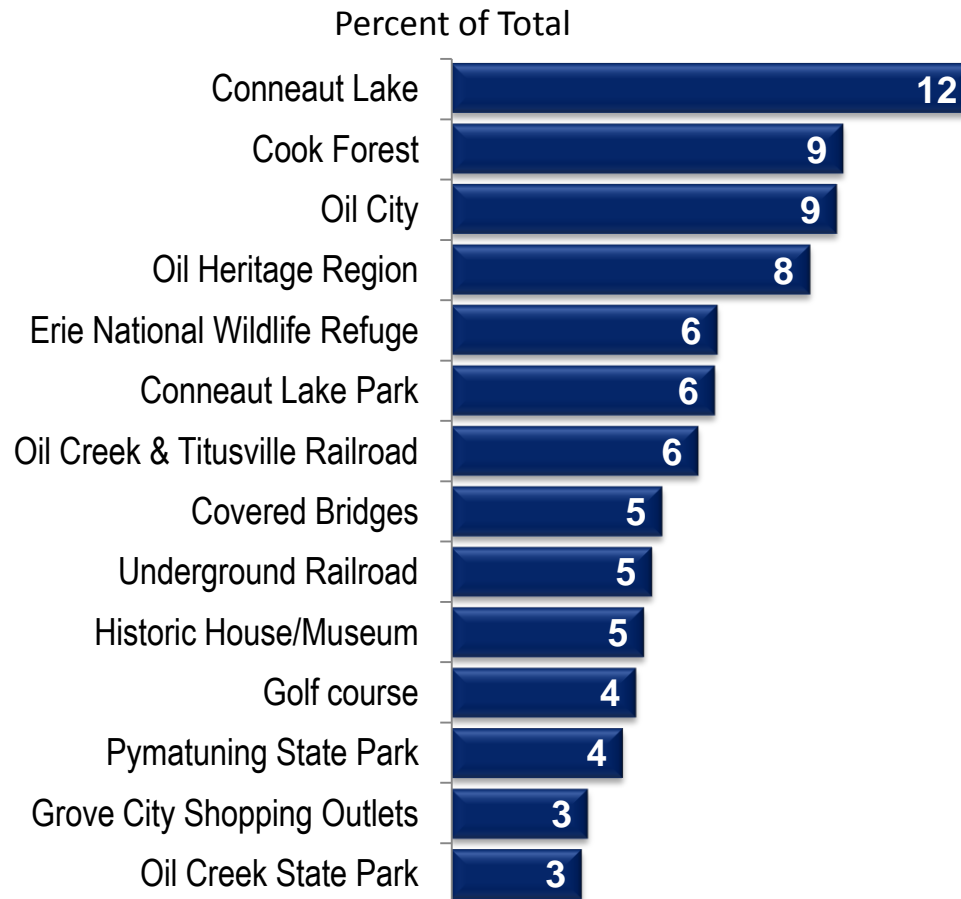
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania's Great Lakes Region*



Base: Overnight Trips

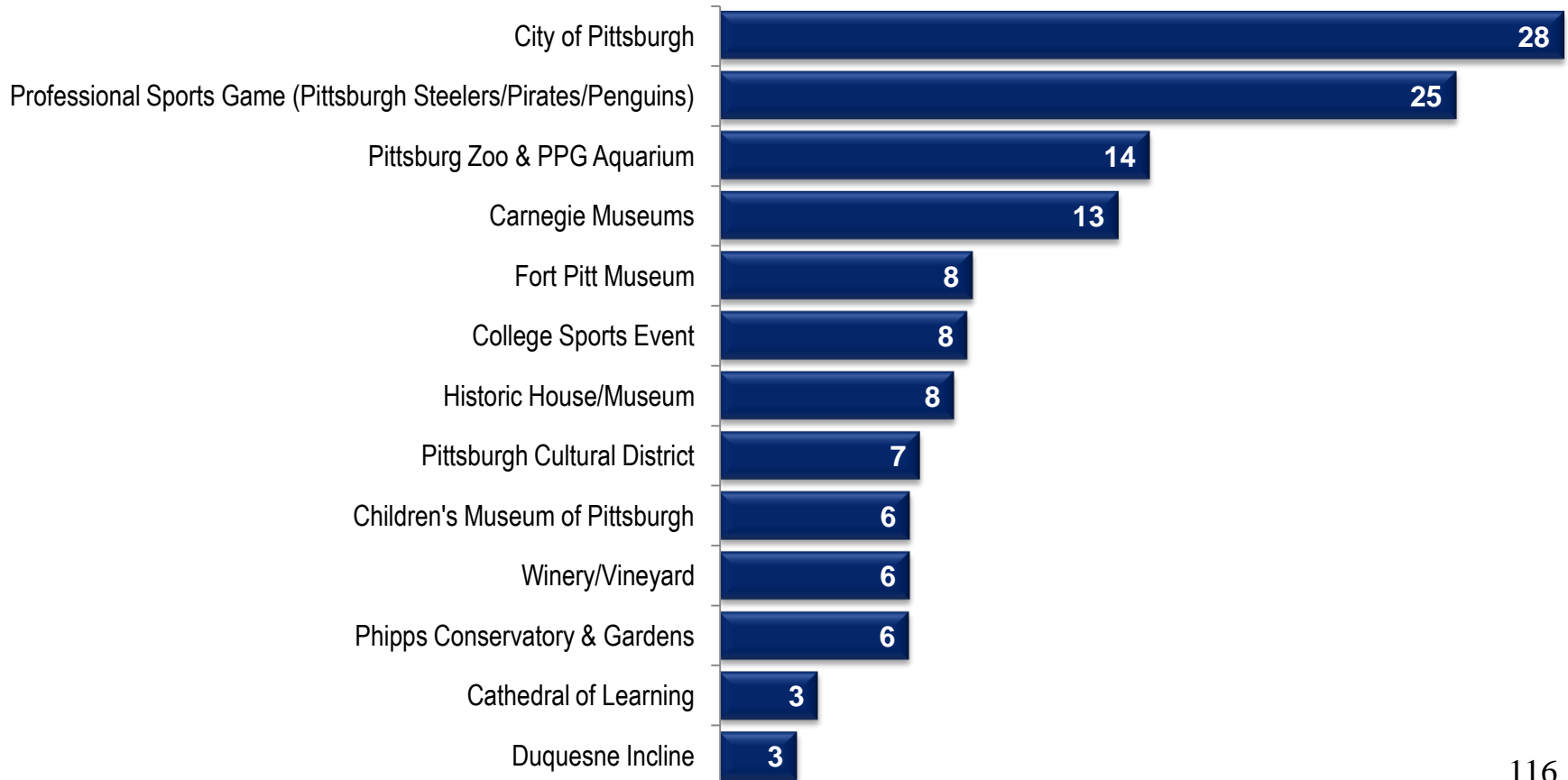


Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



Base: Overnight Marketable Trips

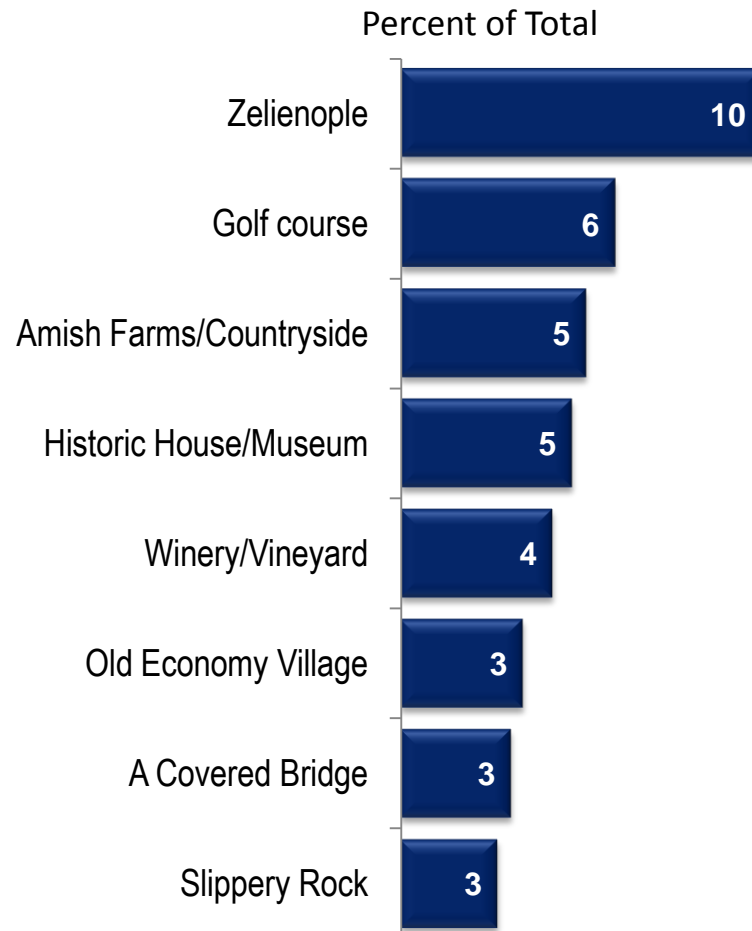
Percent of Total



Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



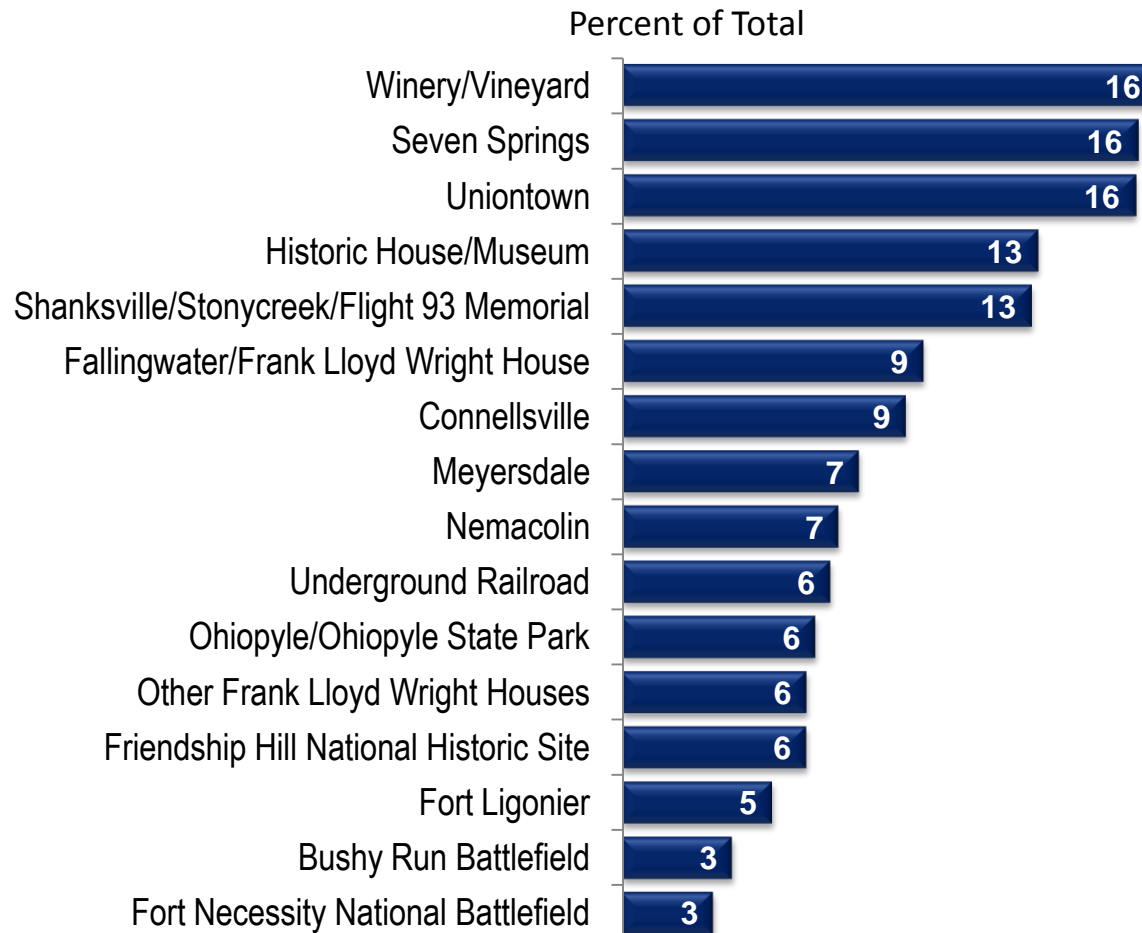
Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Laurel Highlands Region*



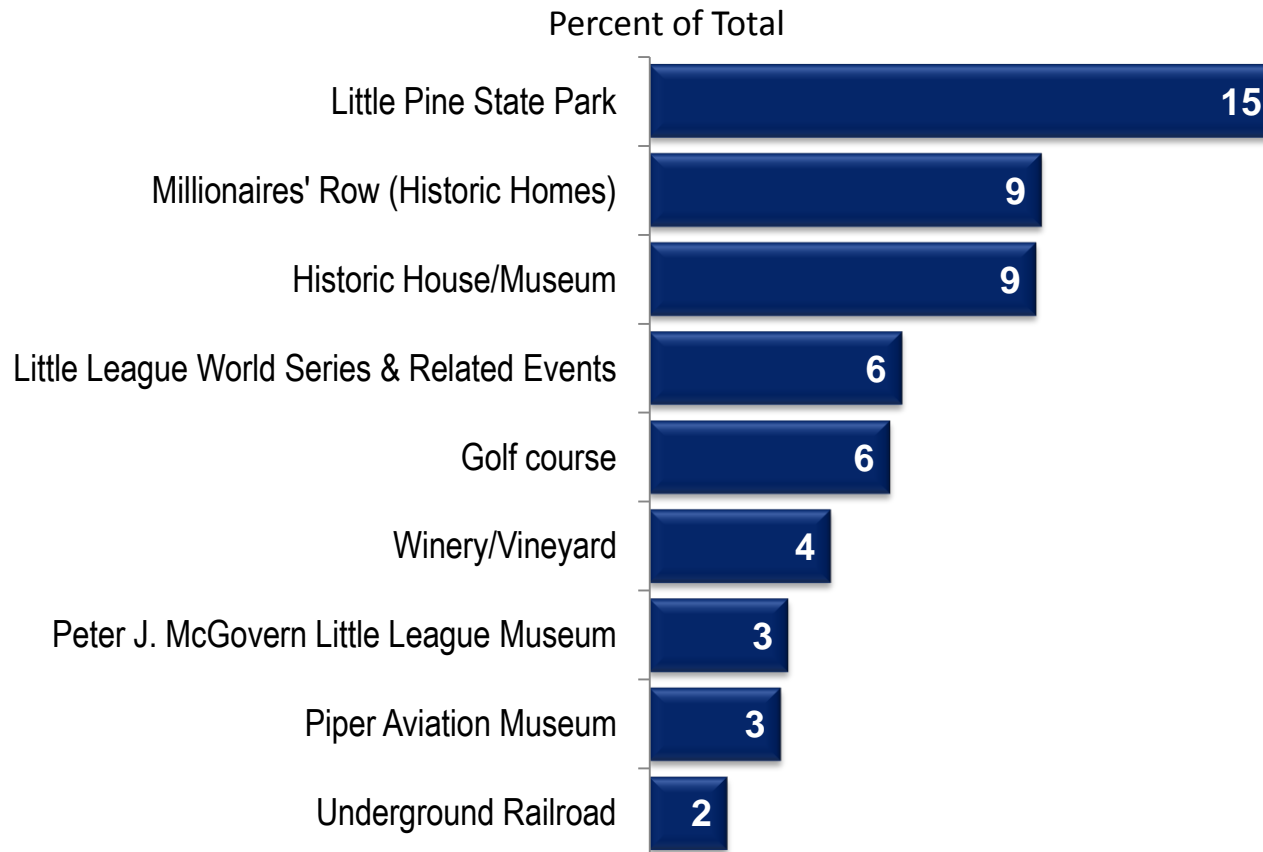
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



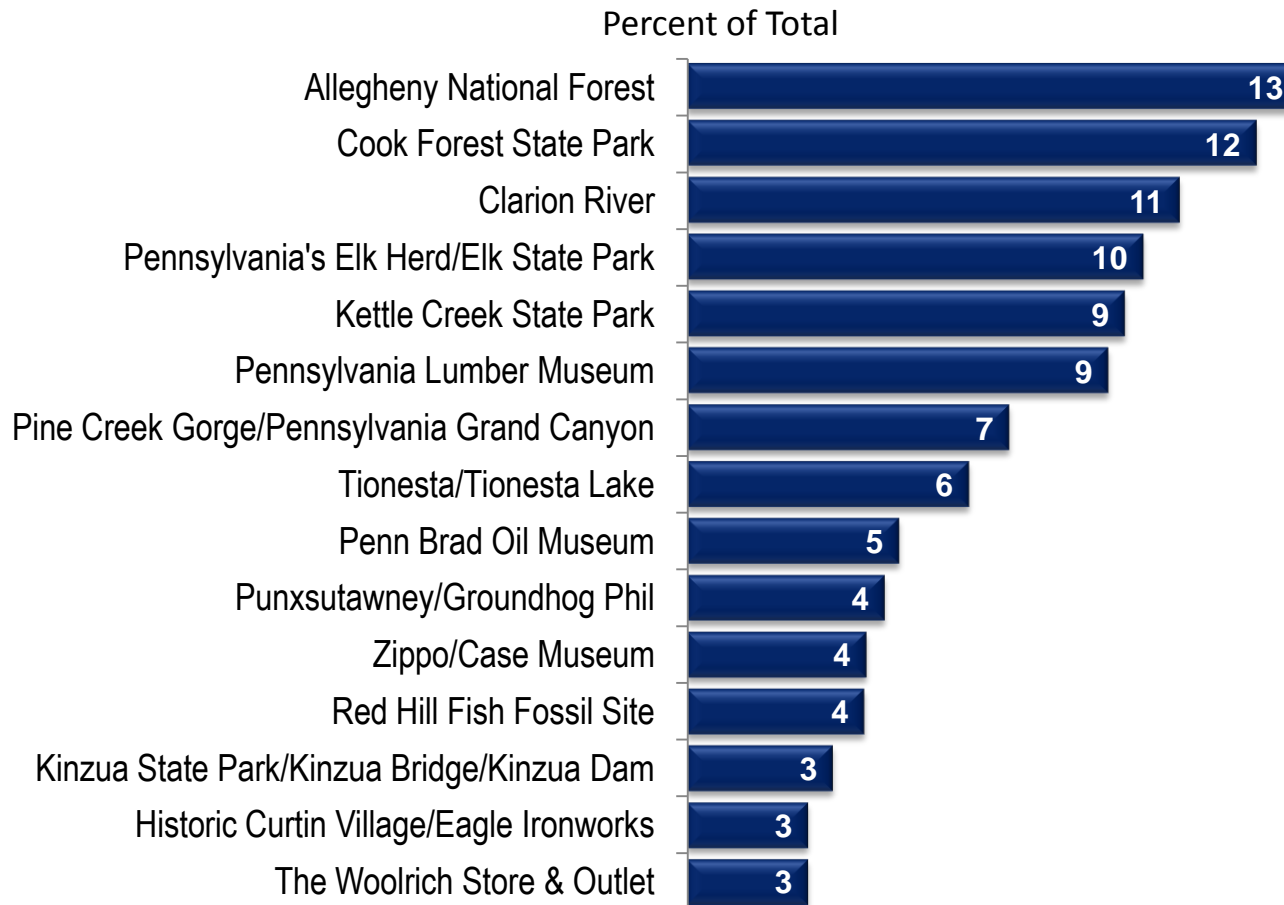
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



Base: Overnight Trips

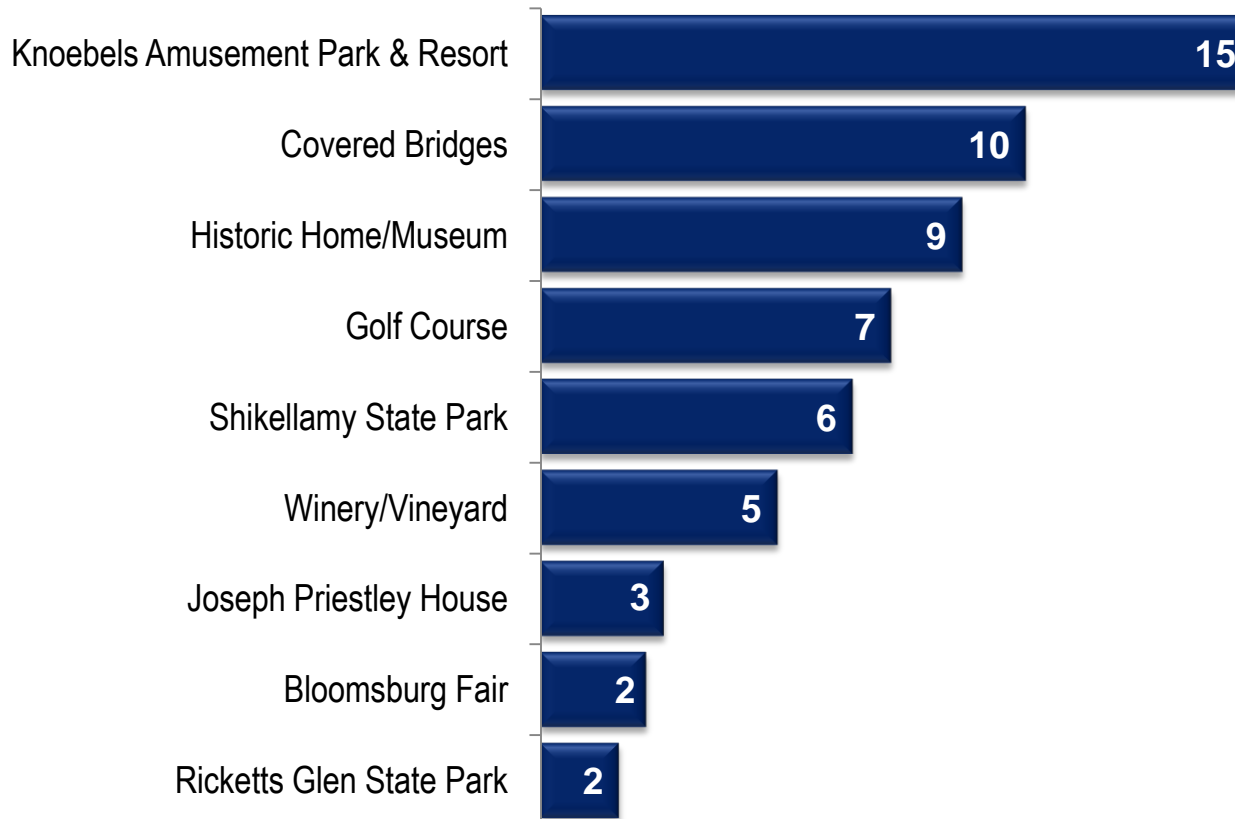


Pennsylvania Attractions/Events — Valleys of the Susquehanna Region*



Base: Overnight Trips

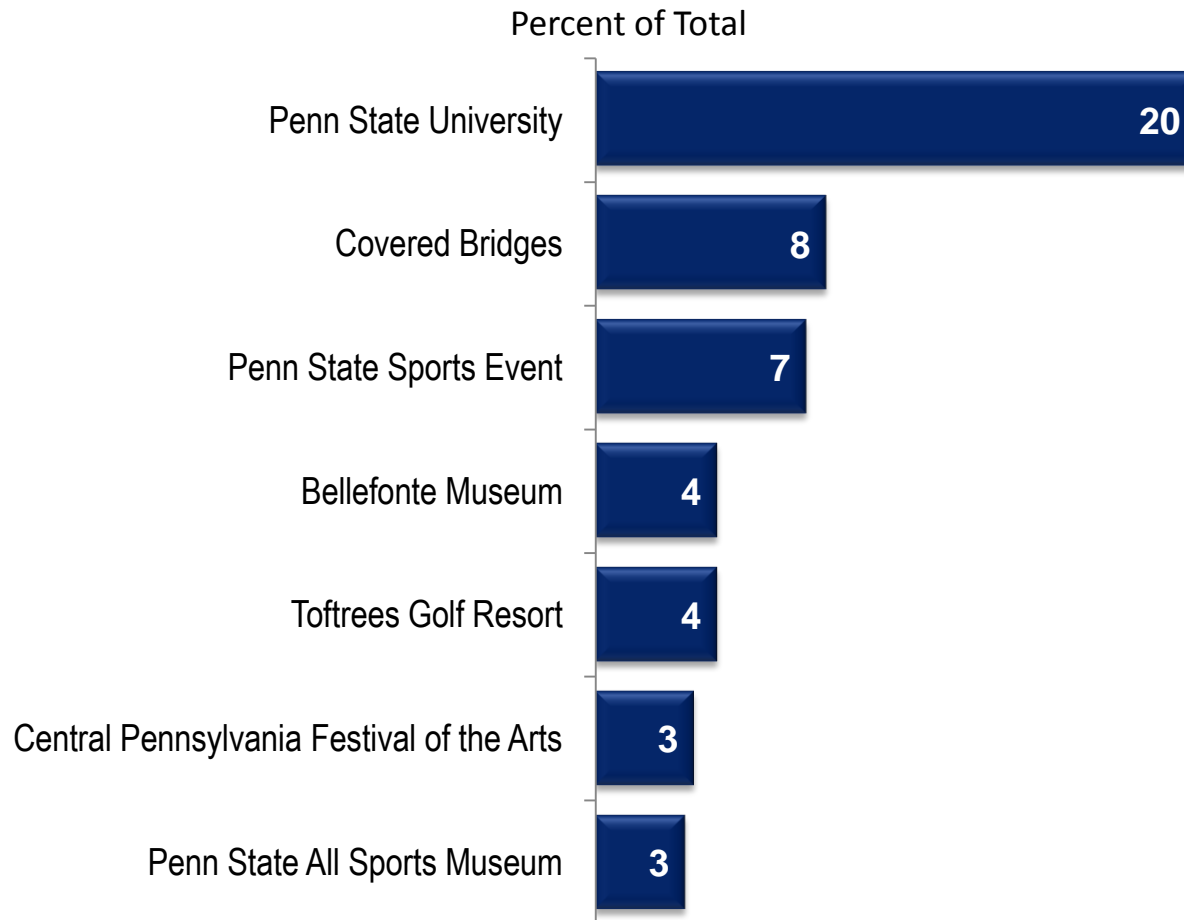
Percent of Total



Pennsylvania Attractions/Events — The Alleghenies Region*



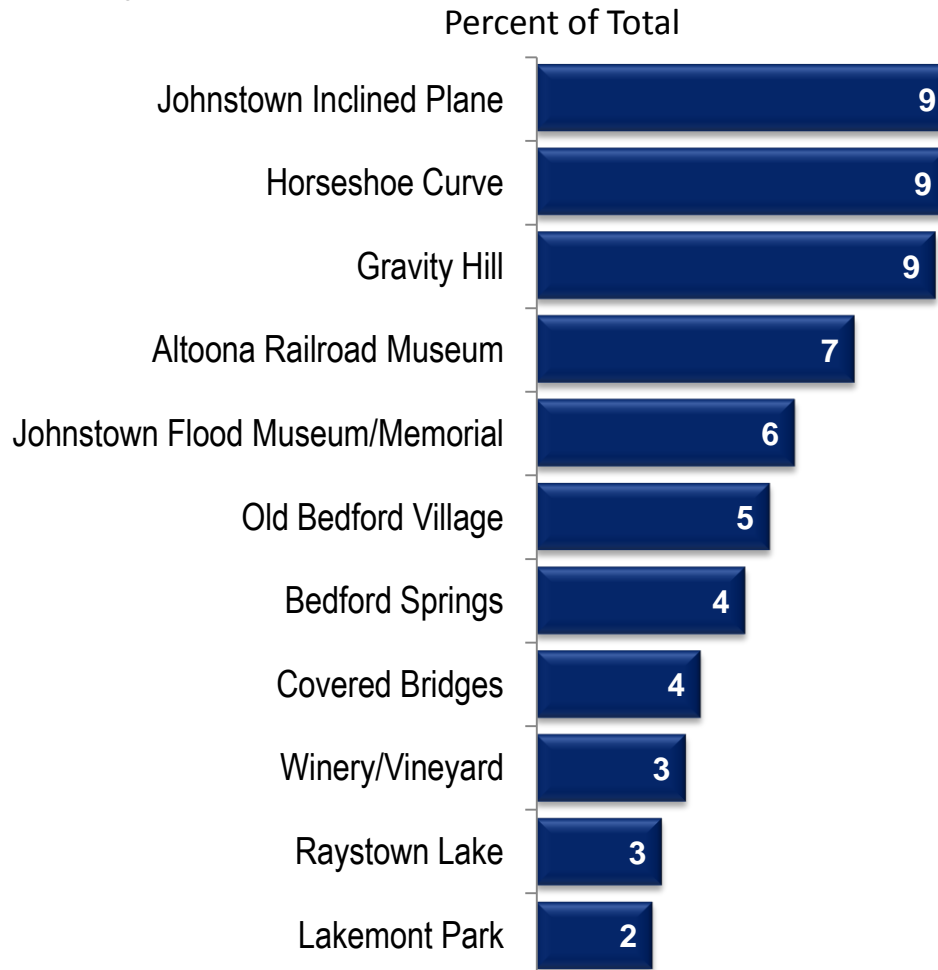
Base: Overnight Trips



Pennsylvania Attractions/Events — The Alleghenies Region*



Base: Overnight Trips

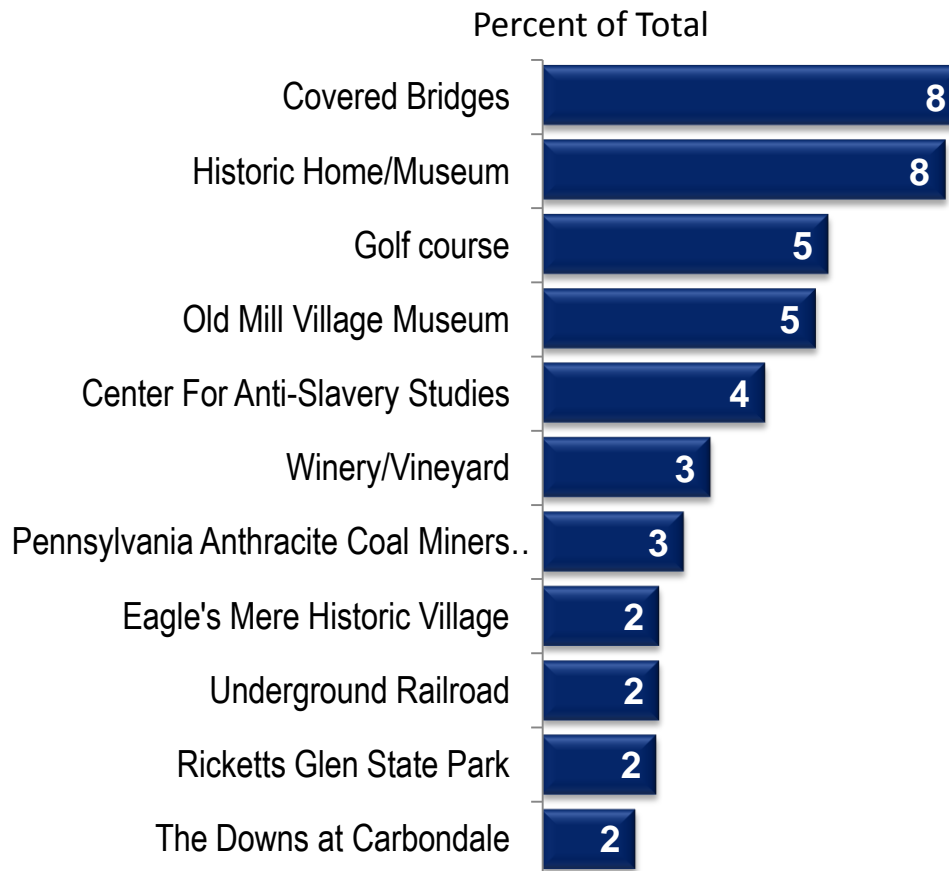


*Remainder of Region

Pennsylvania Attractions/Events — Upstate PA Region*



Base: Overnight Trips



Pennsylvania Attractions/Events — Upstate PA Region*



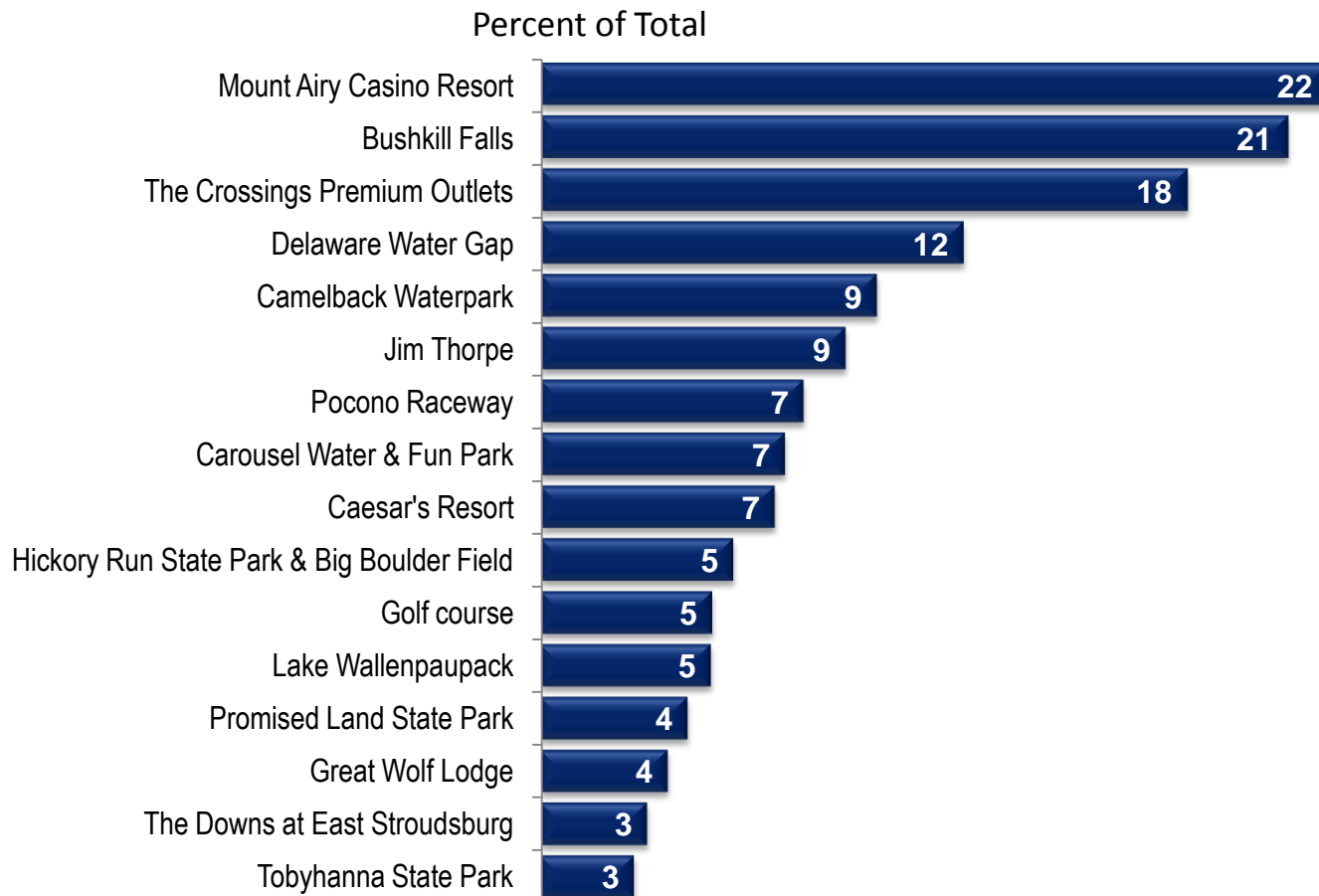
Base: Overnight Trips



Pennsylvania Attractions/Events — Pocono Mountains Region



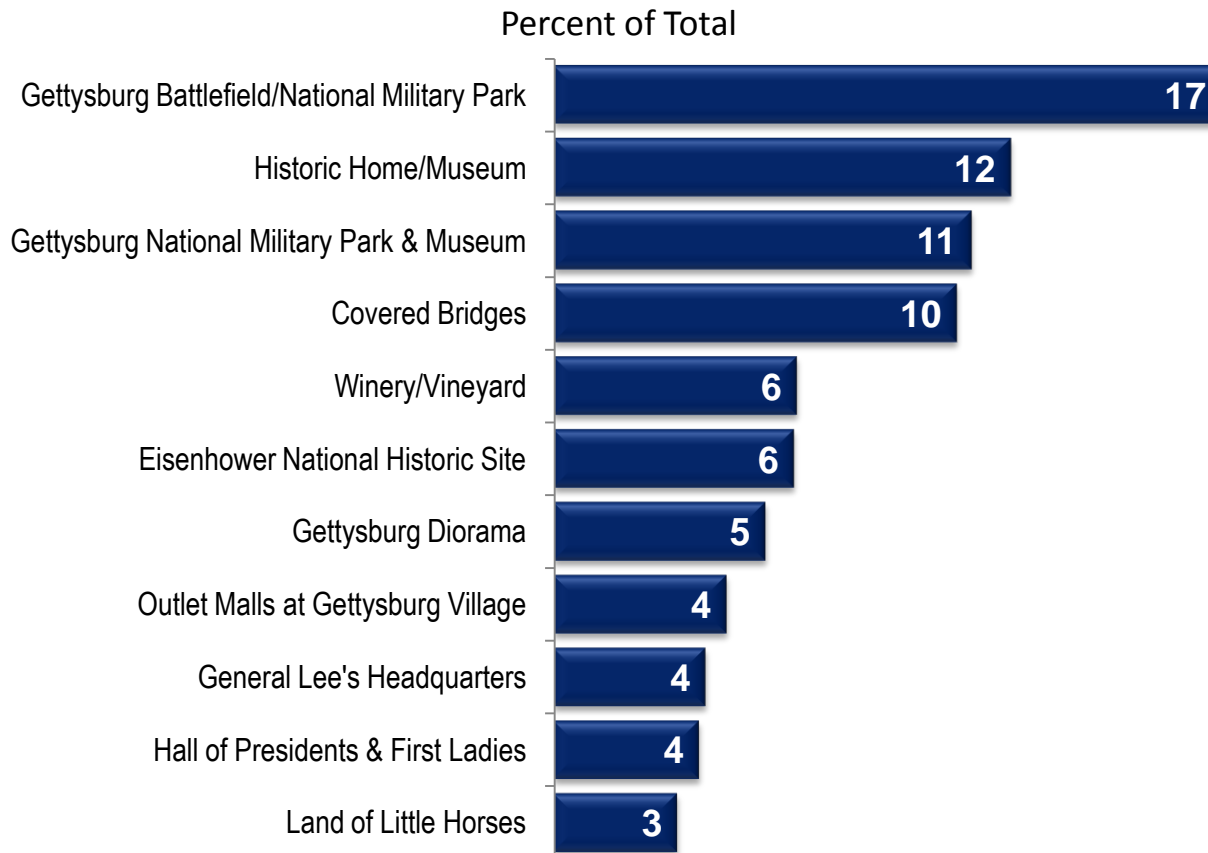
Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

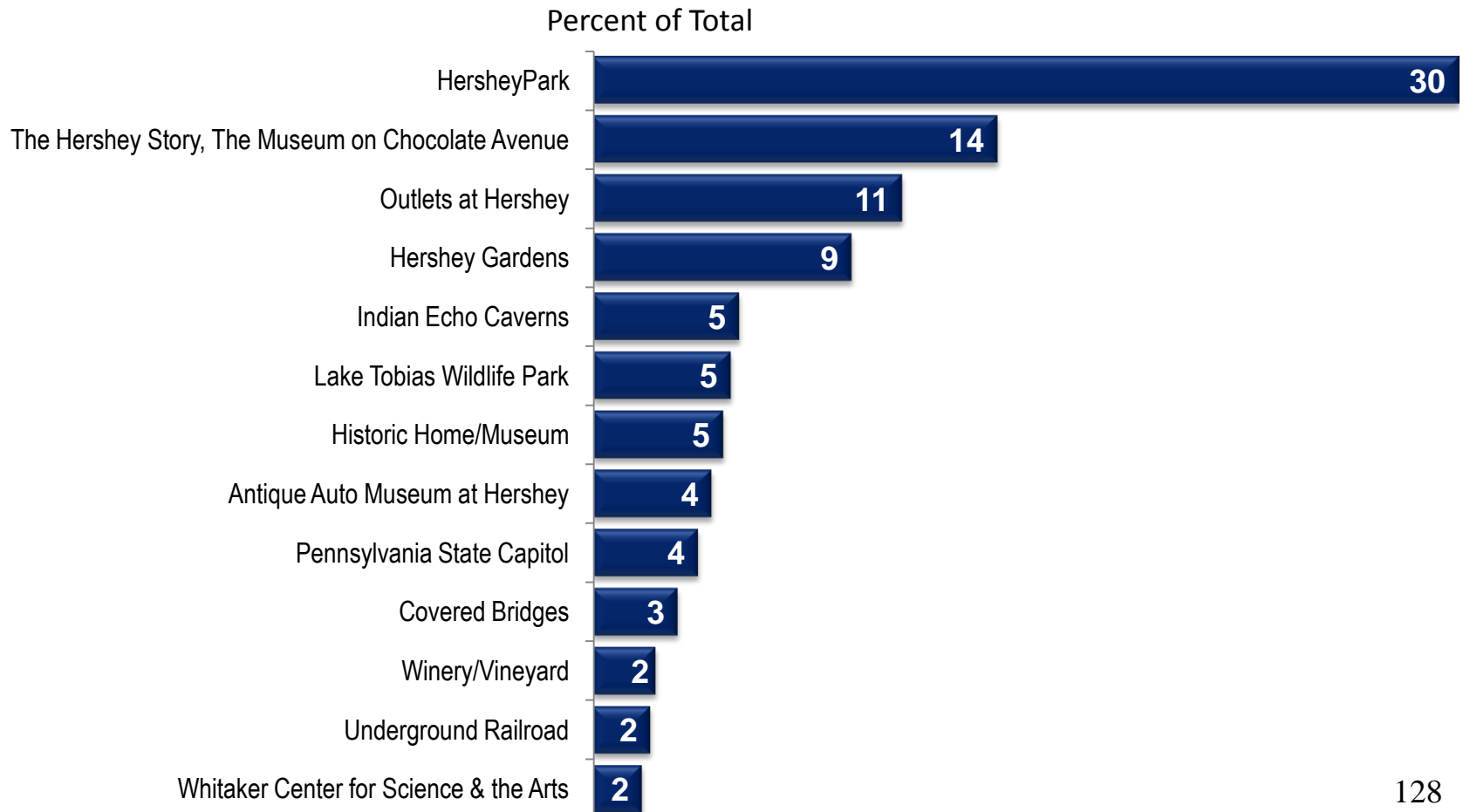


*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net attendance of 18%

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

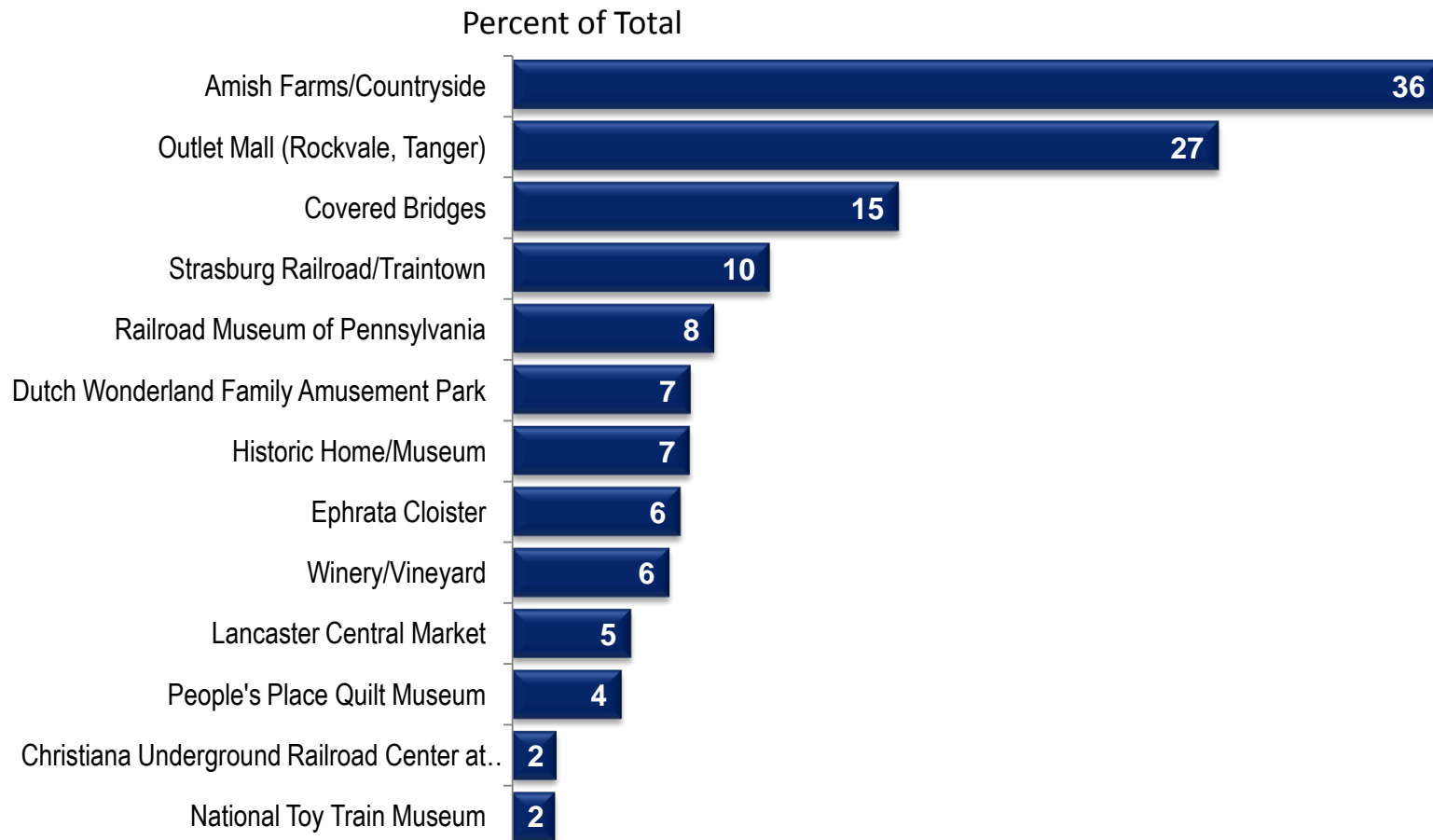


* Harrisburg/Hershey Area

Pennsylvania Attractions/Events — Dutch Country Roads Region*



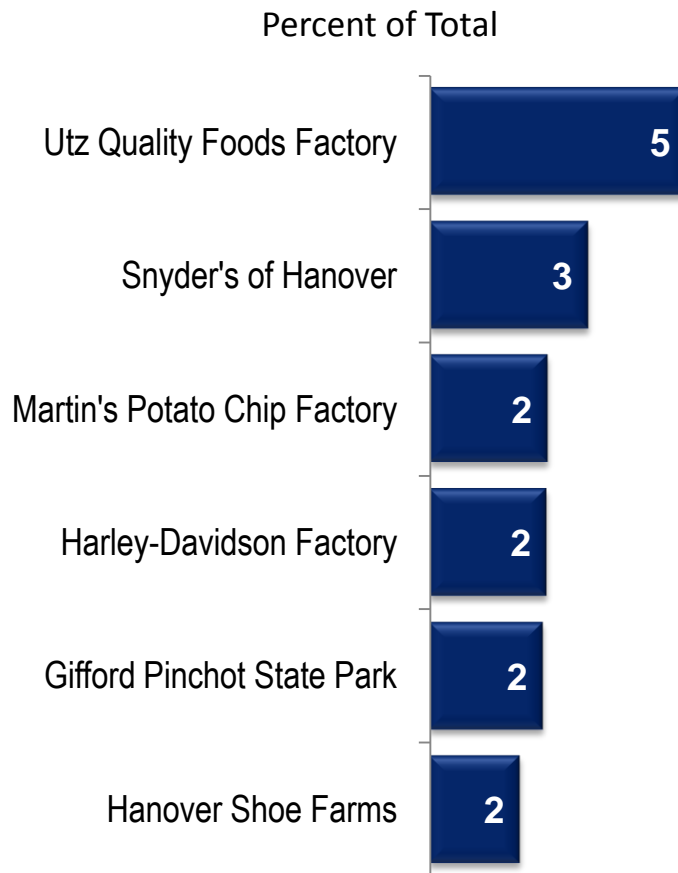
Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

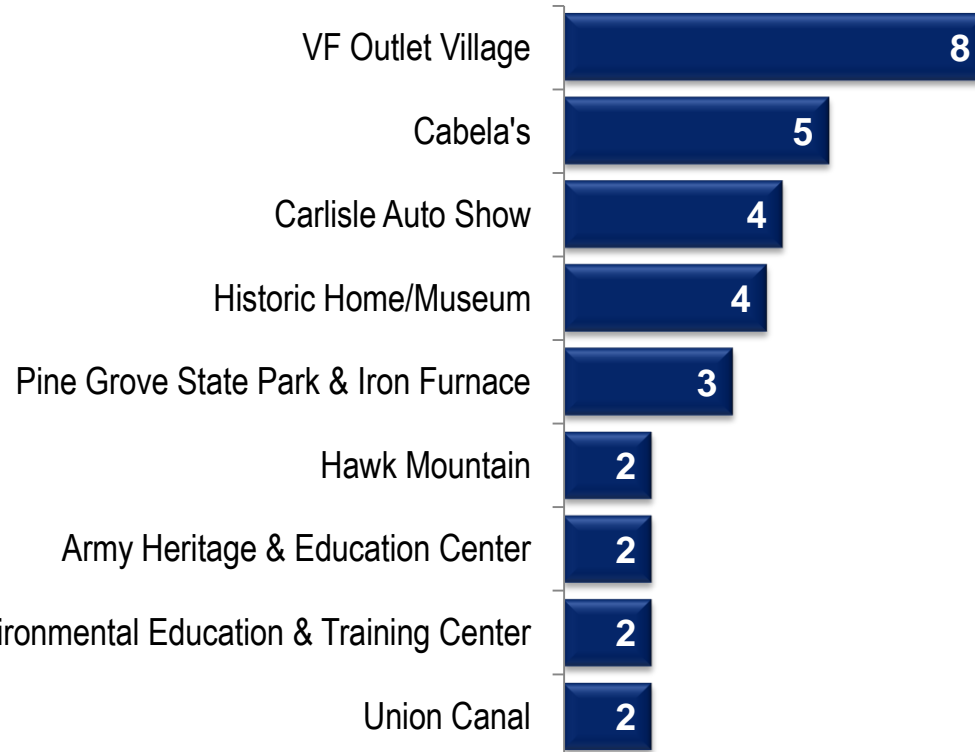


Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

Percent of Total

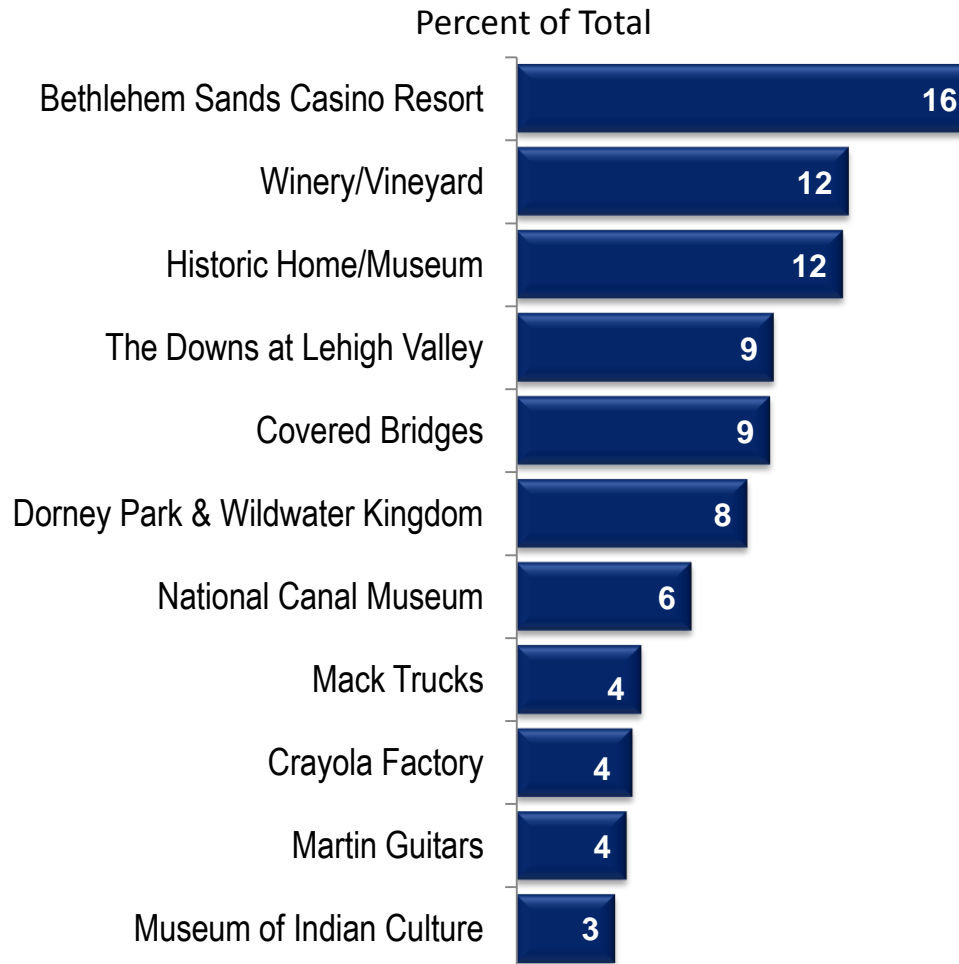


*Remainder of region

Pennsylvania Attractions/Events — Lehigh Valley Region



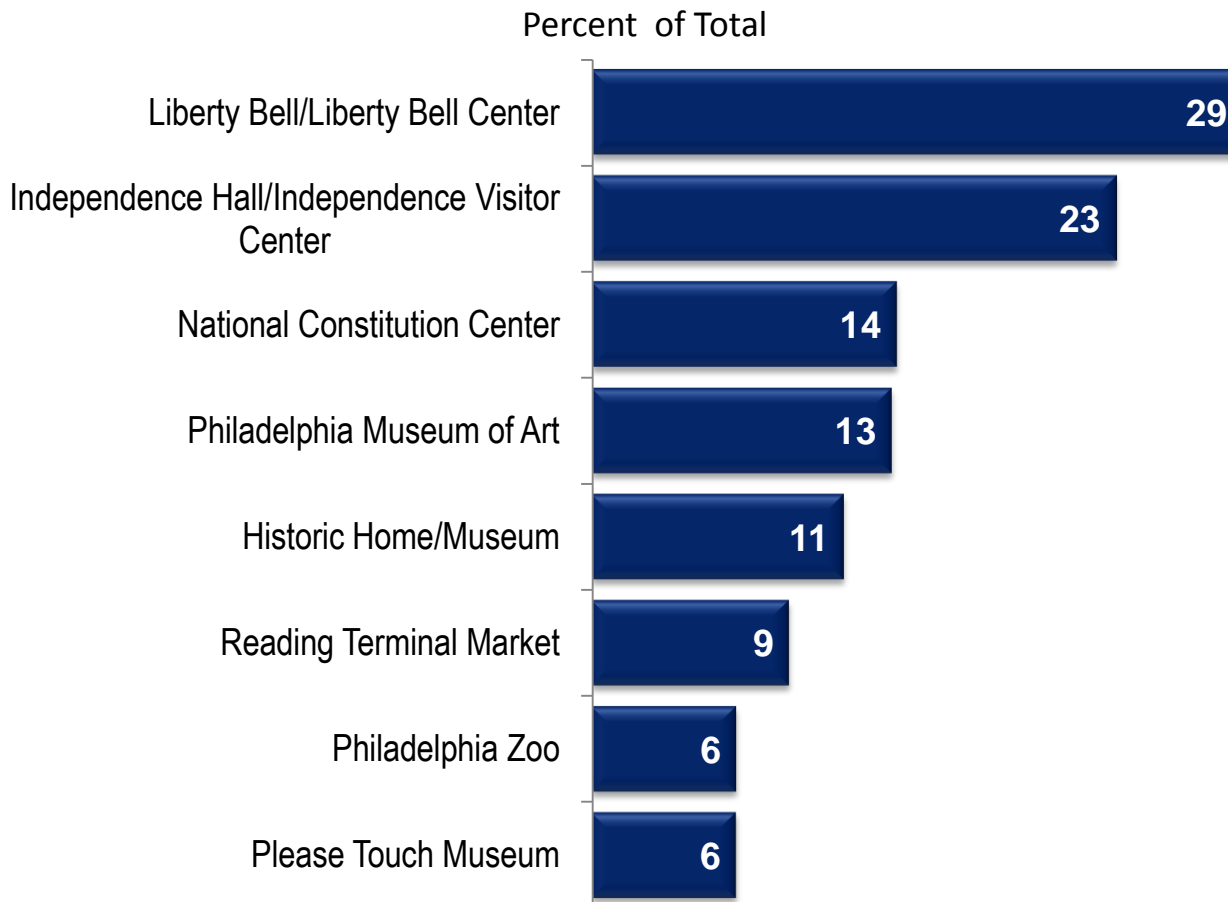
Base: Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region* (cont'd)



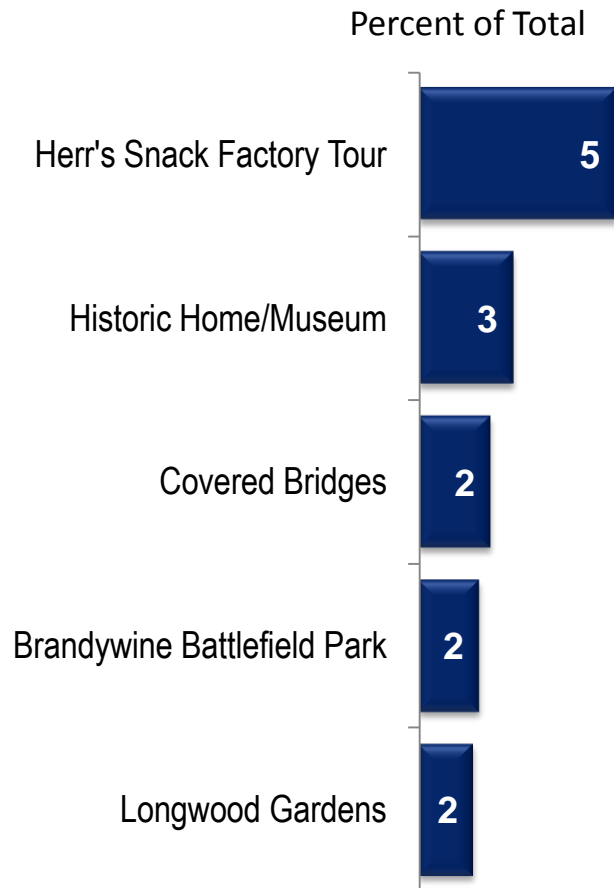
Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



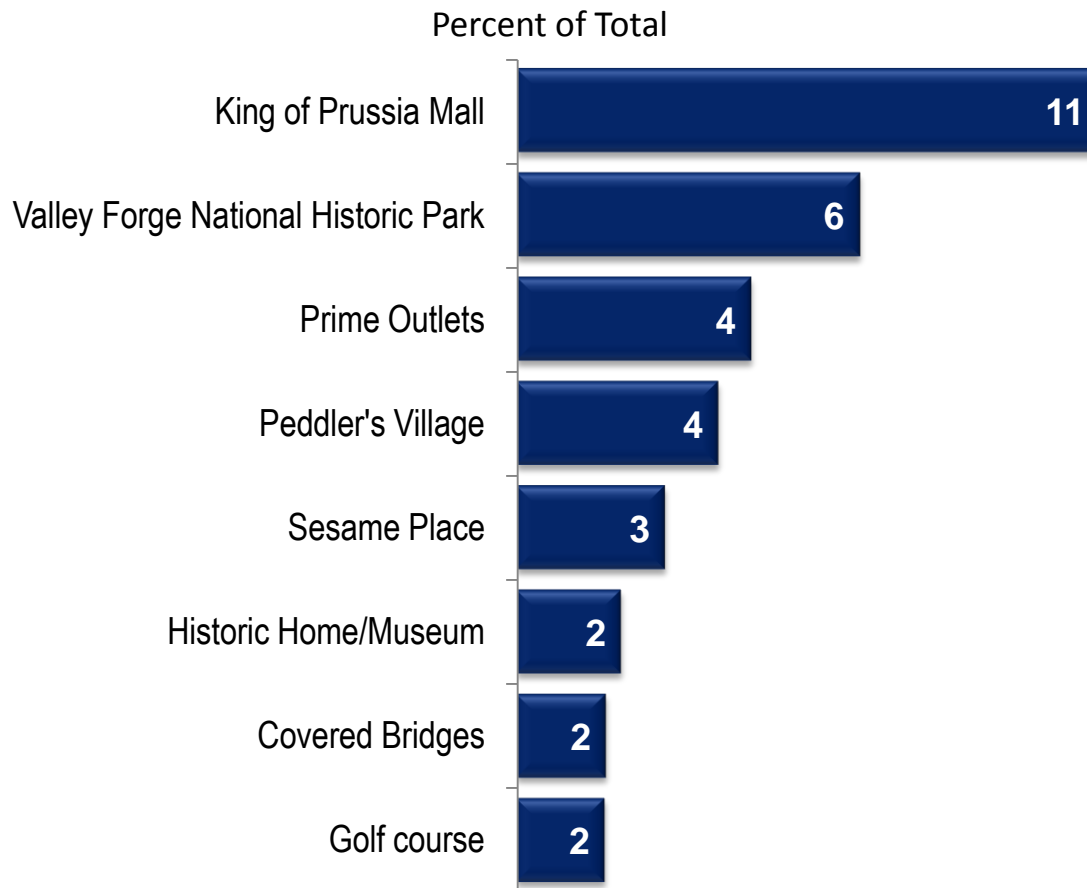
Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips



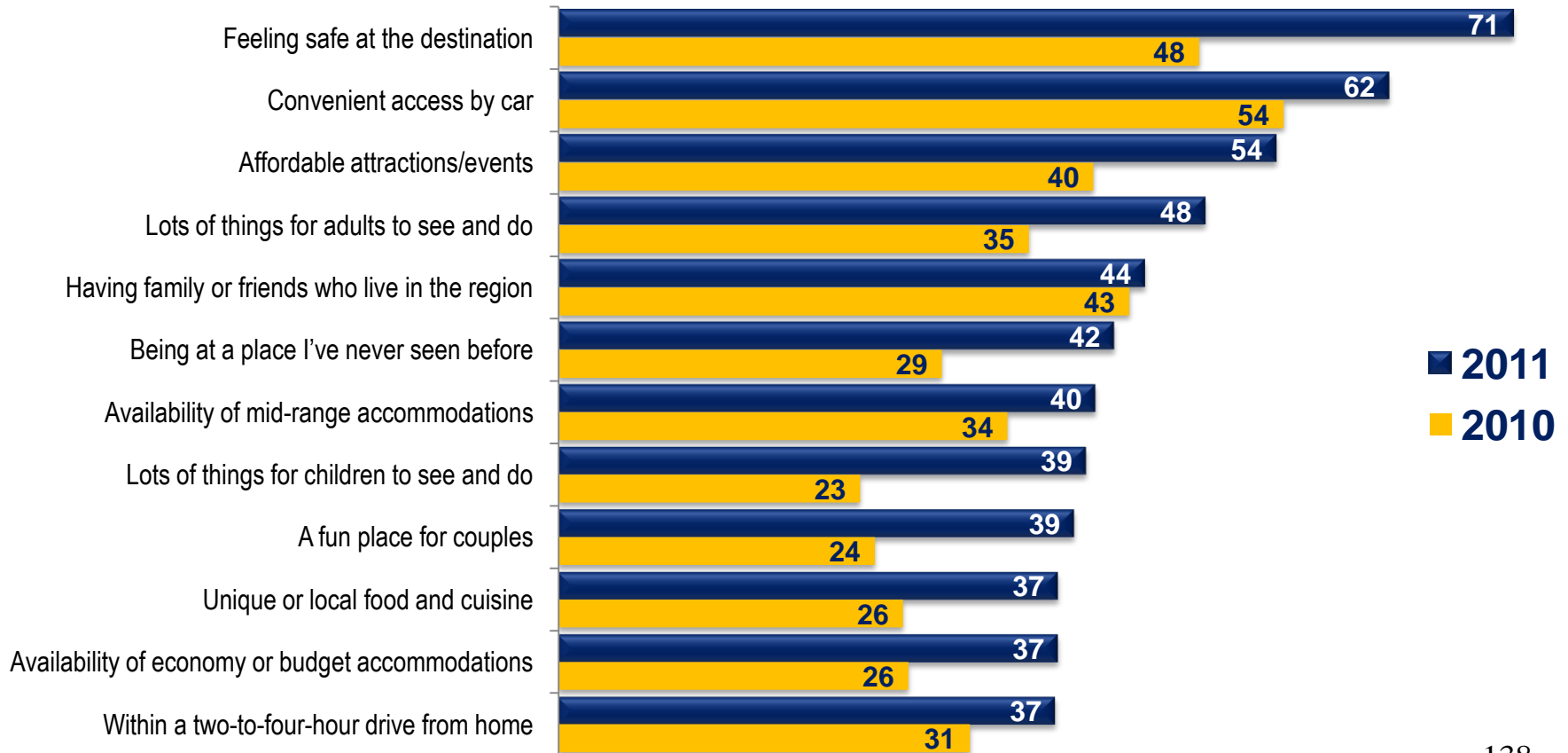
Importance of Factors in Choice of Pennsylvania Tourism Region

Importance of Factors In Choosing to Visit Pennsylvania's Great Lakes Region



Base: Overnight Trips

% Rating Factor As Very Important*



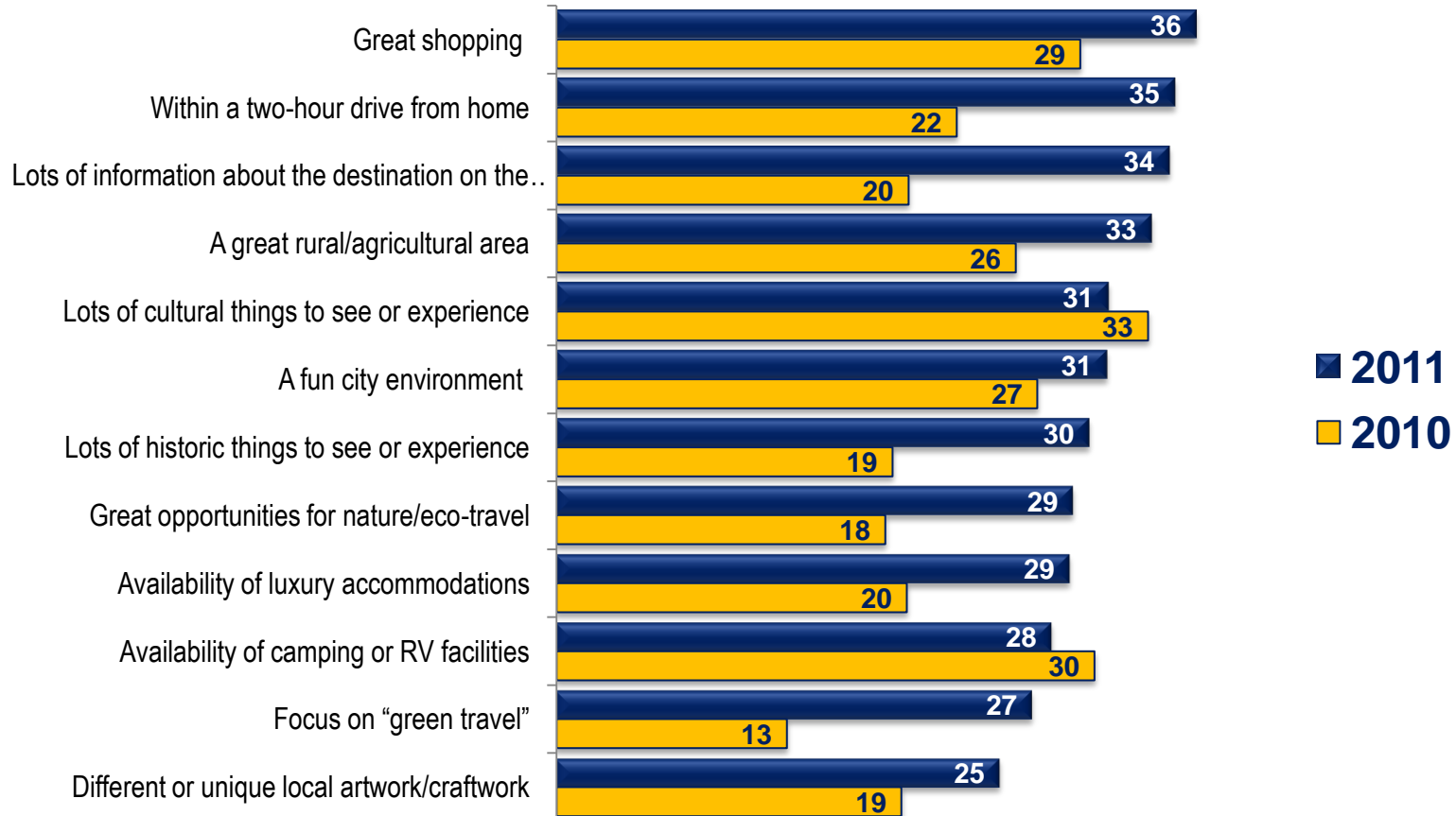
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pennsylvania's Great Lakes Region (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



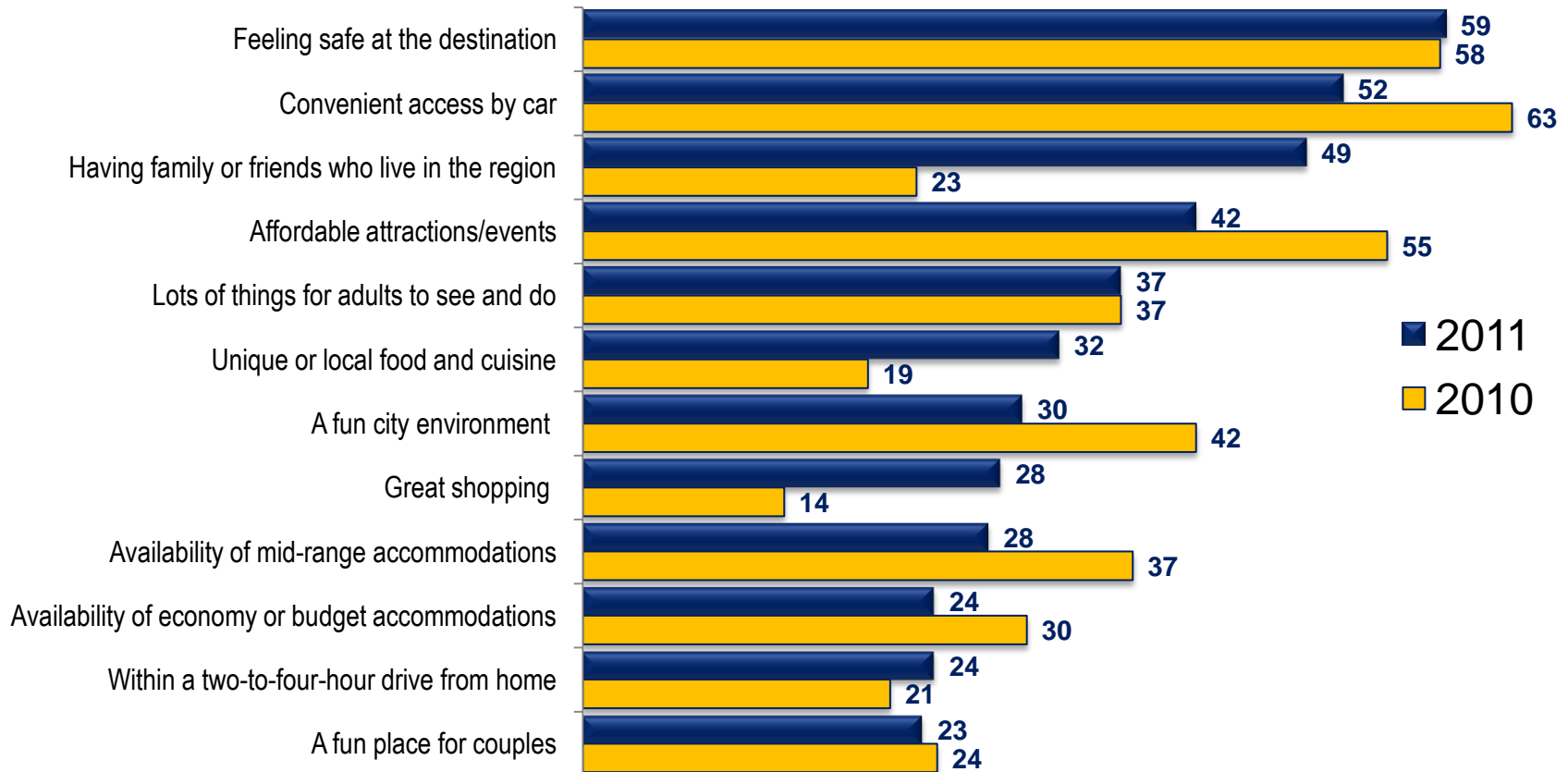
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pittsburgh & Its Countryside



Base: Overnight Trips

% Rating Factor As Very Important*



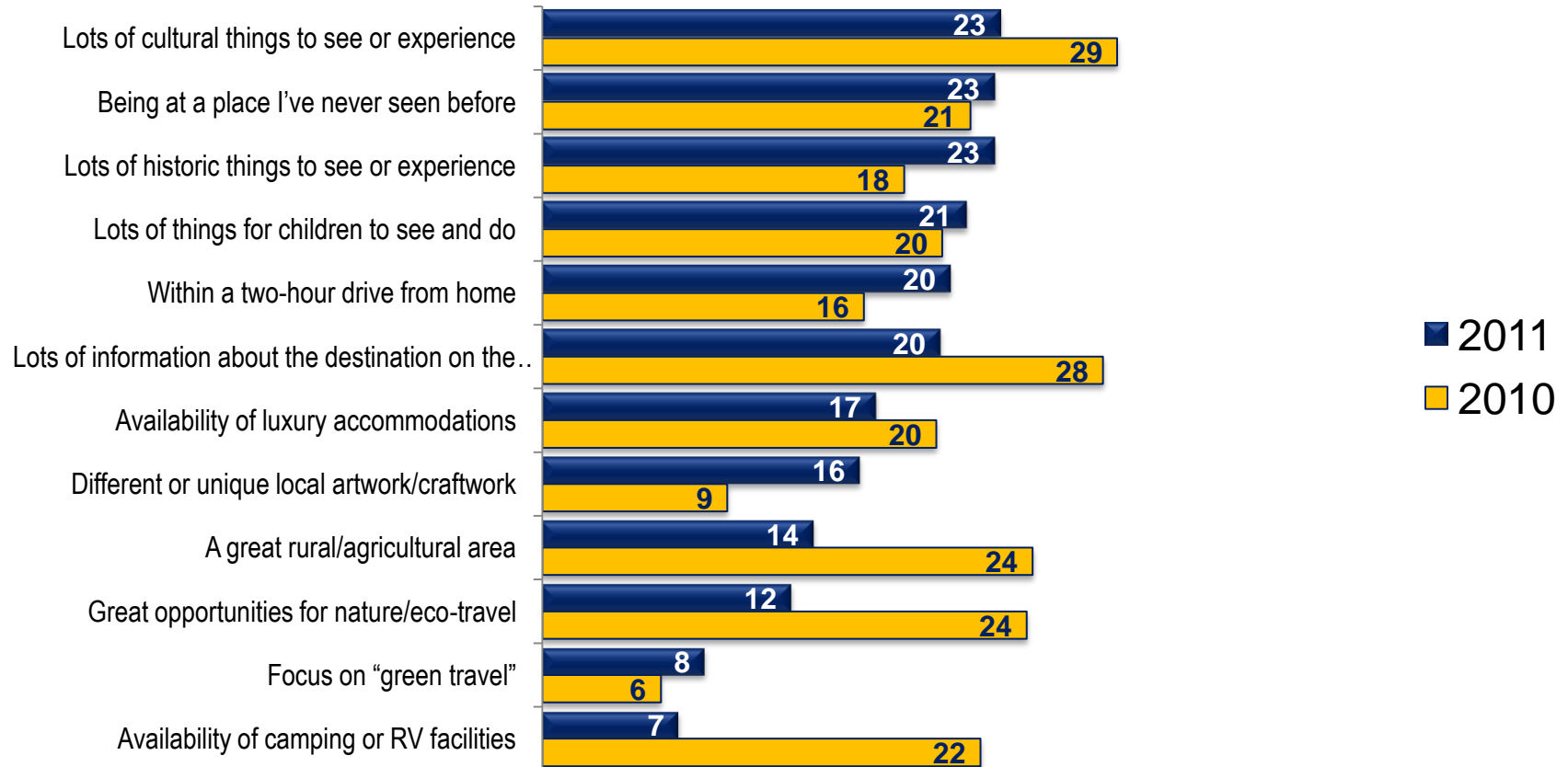
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pittsburgh & Its Countryside (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



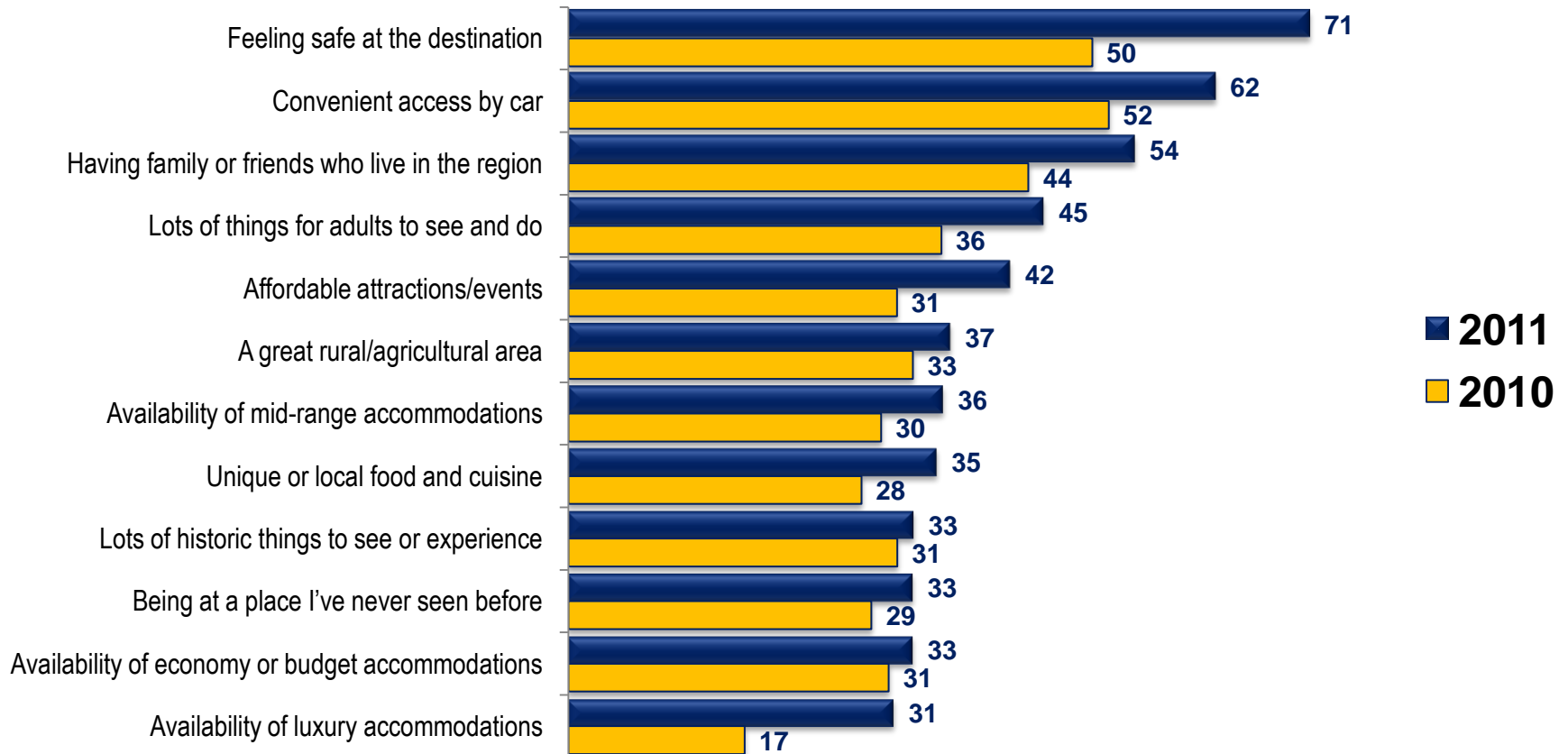
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Laurel Highlands Region



Base: Overnight Trips

% Rating Factor As Very Important*



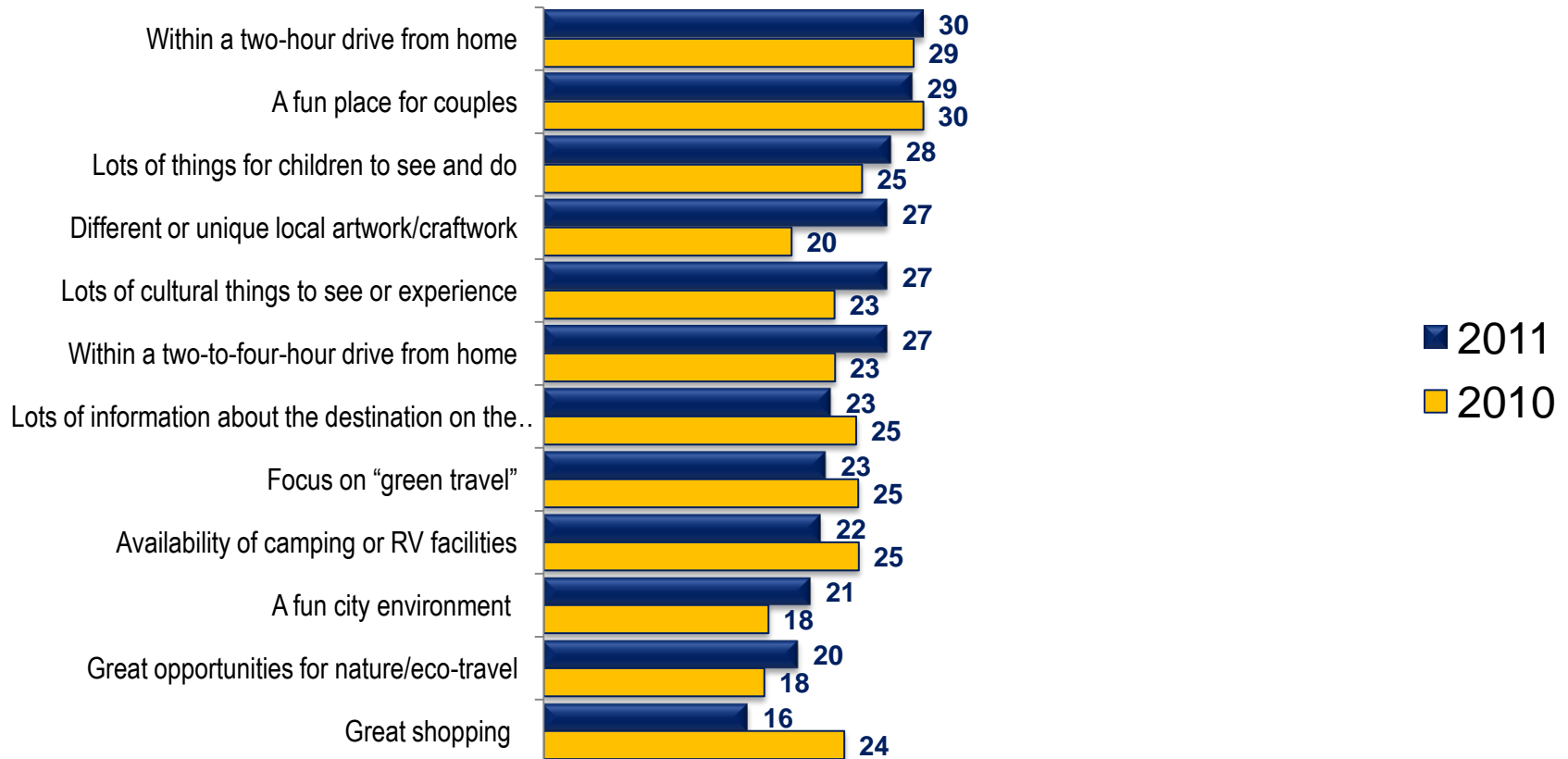
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Laurel Highlands Region (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



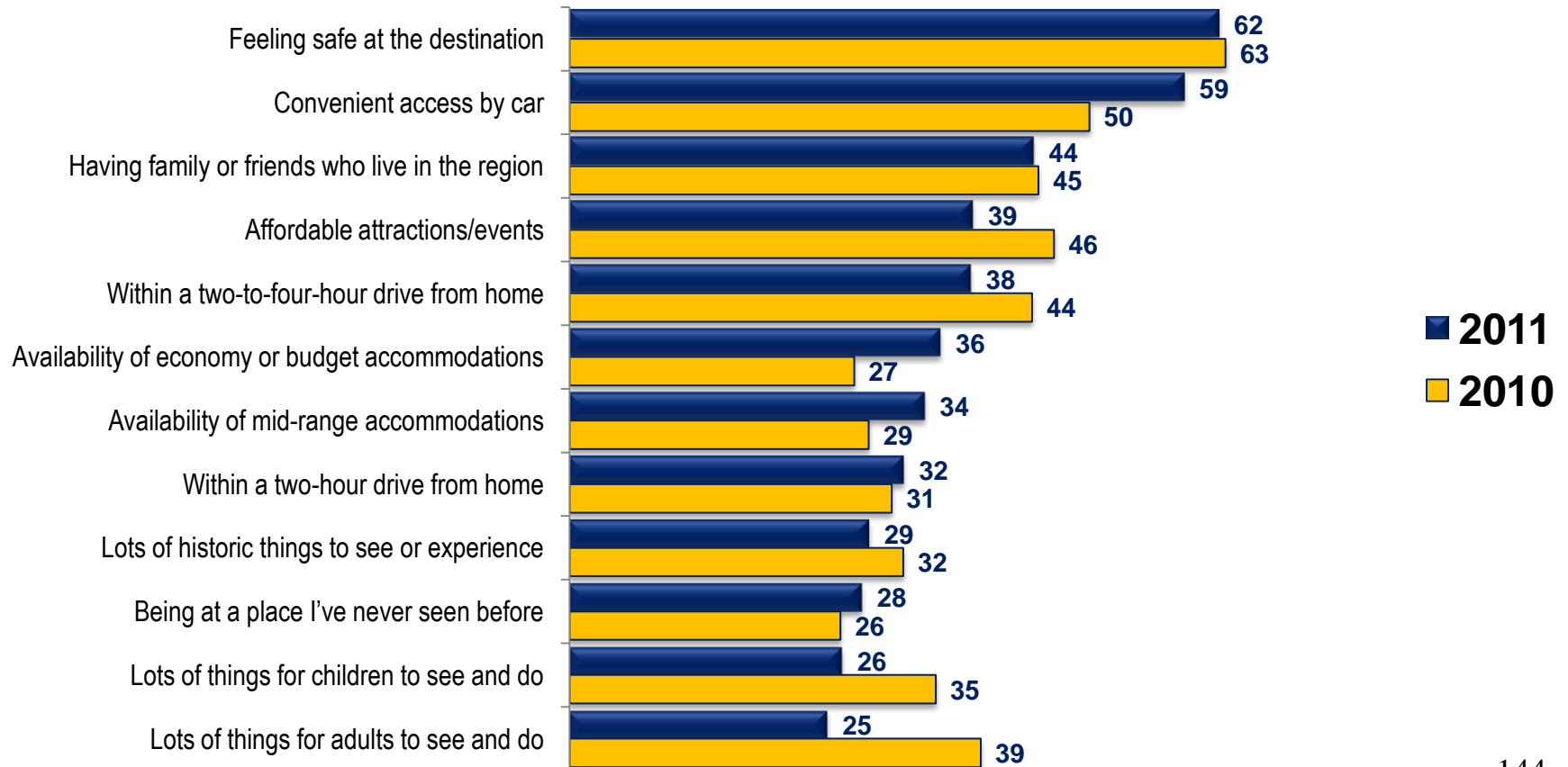
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pennsylvania Wilds



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2011
■ 2010

* Rated 8, 9 or 10 on 10-pt. Importance scale

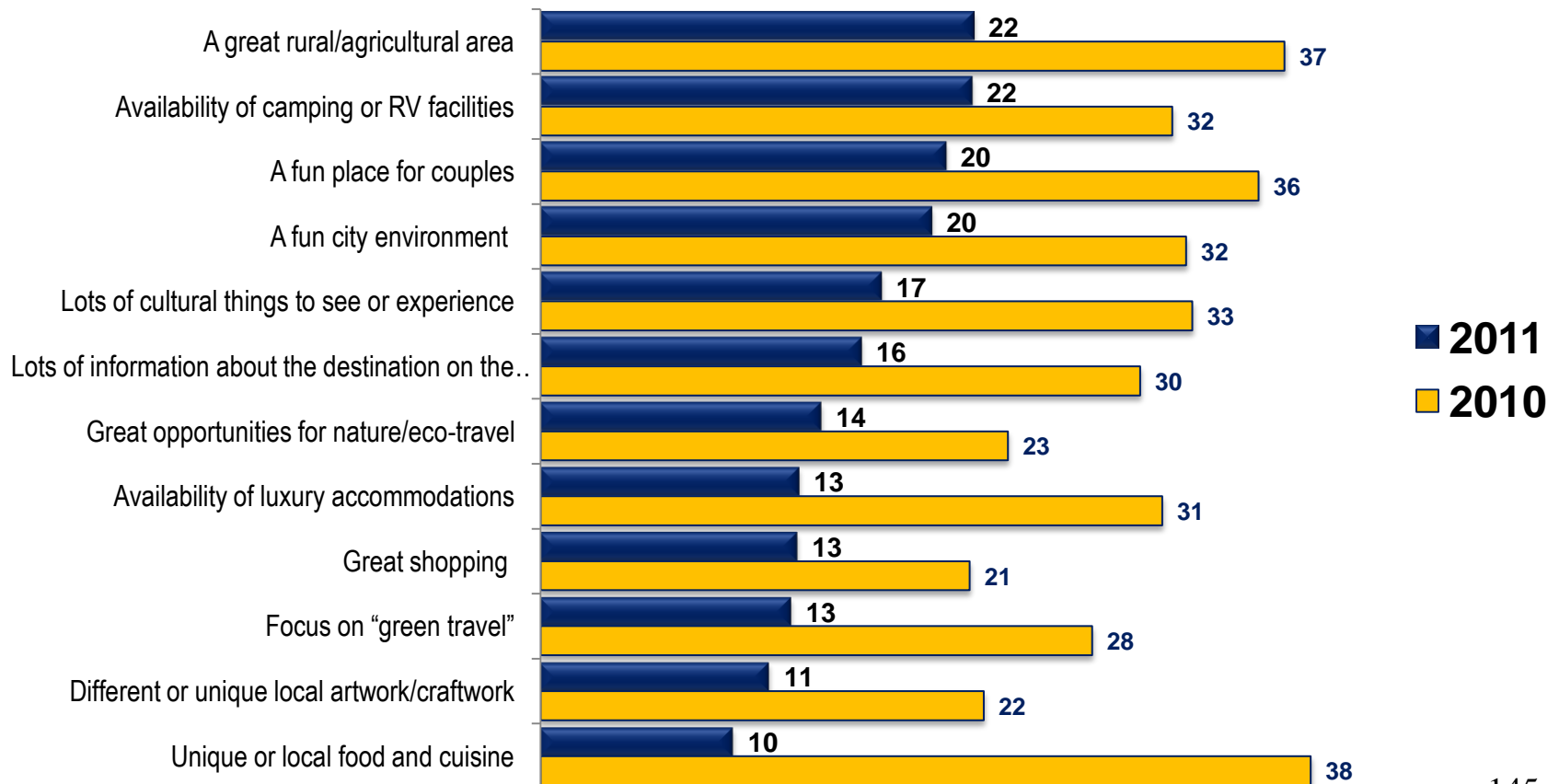
* Caution - low base size.

Importance of Factors In Choosing to Visit Pennsylvania Wilds (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2011
■ 2010

* Rated 8, 9 or 10 on 10-pt. Importance scale

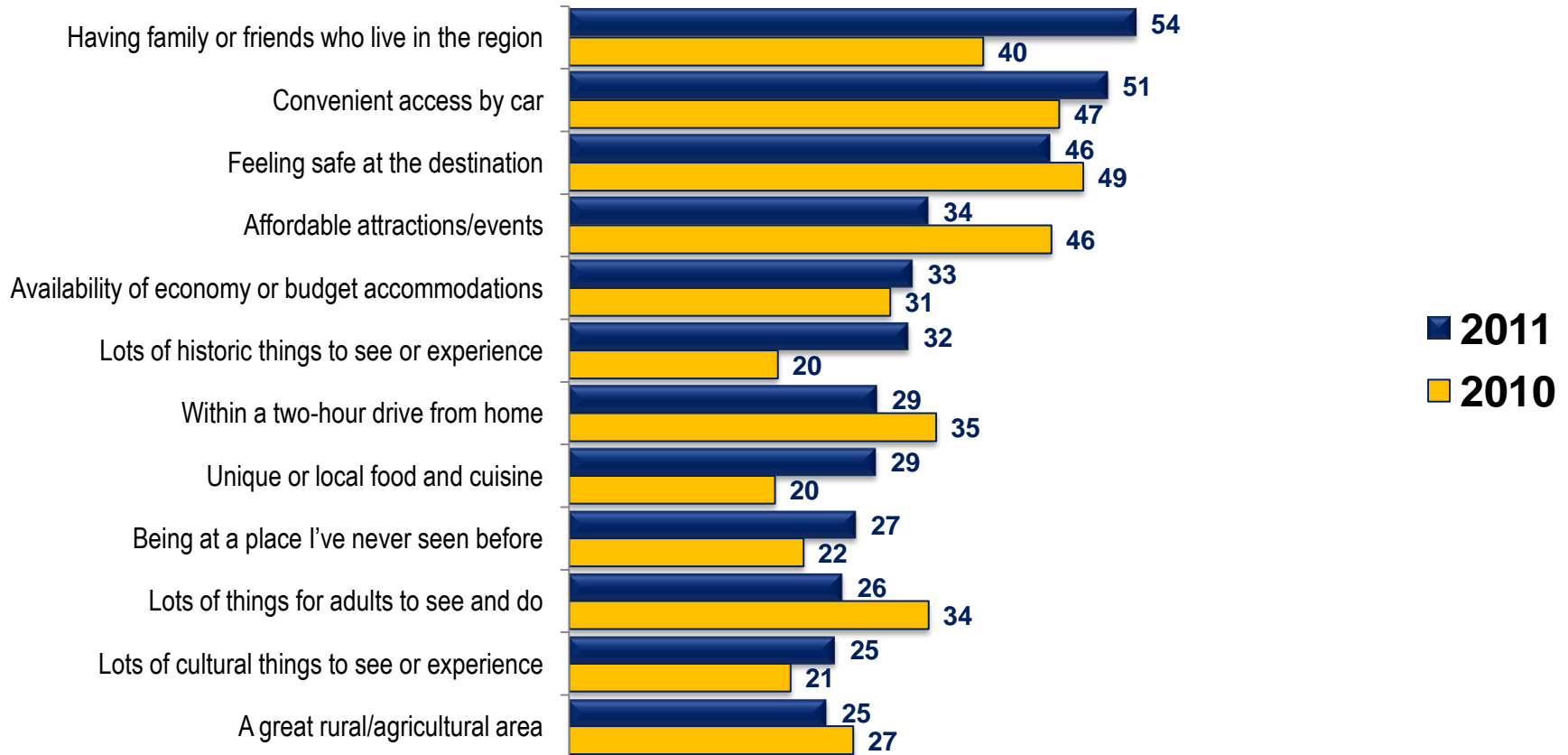
* Caution - low base size.

Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region



Base: Overnight Trips

% Rating Factor As Very Important*



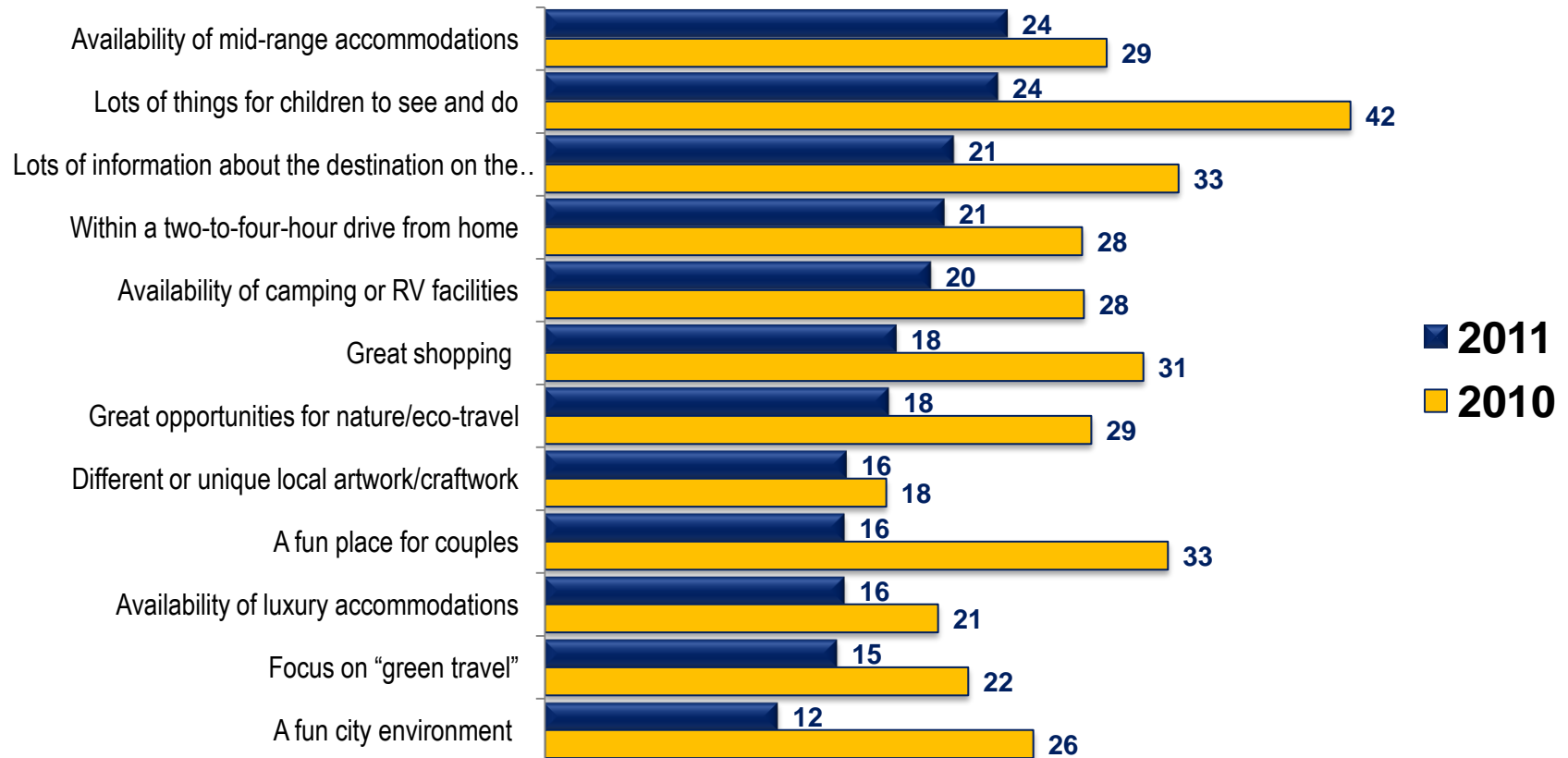
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region Cont'd



Base: Overnight Trips

% Rating Factor As Very Important*



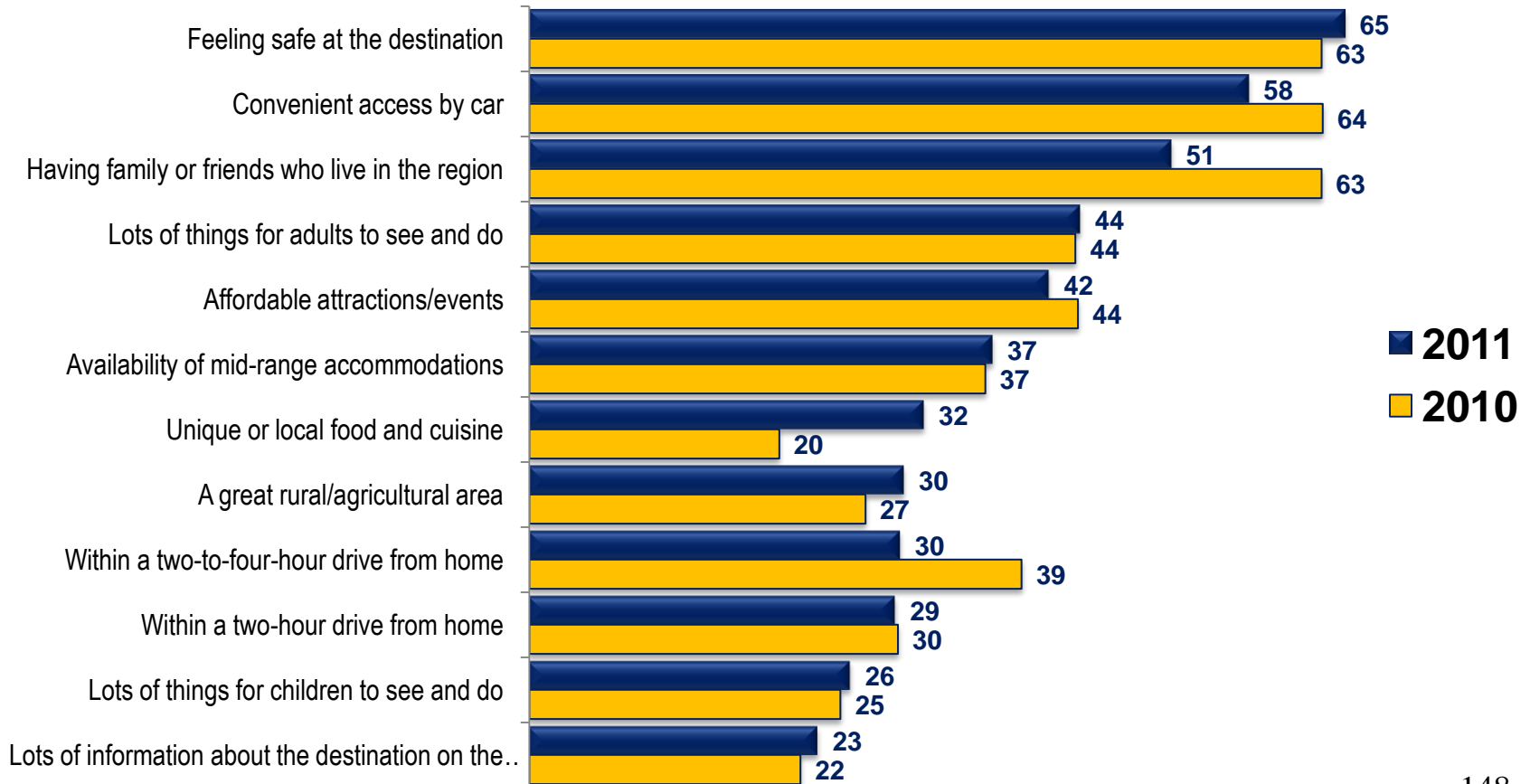
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit The Alleghenies Region



Base: Overnight Trips

% Rating Factor As Very Important*



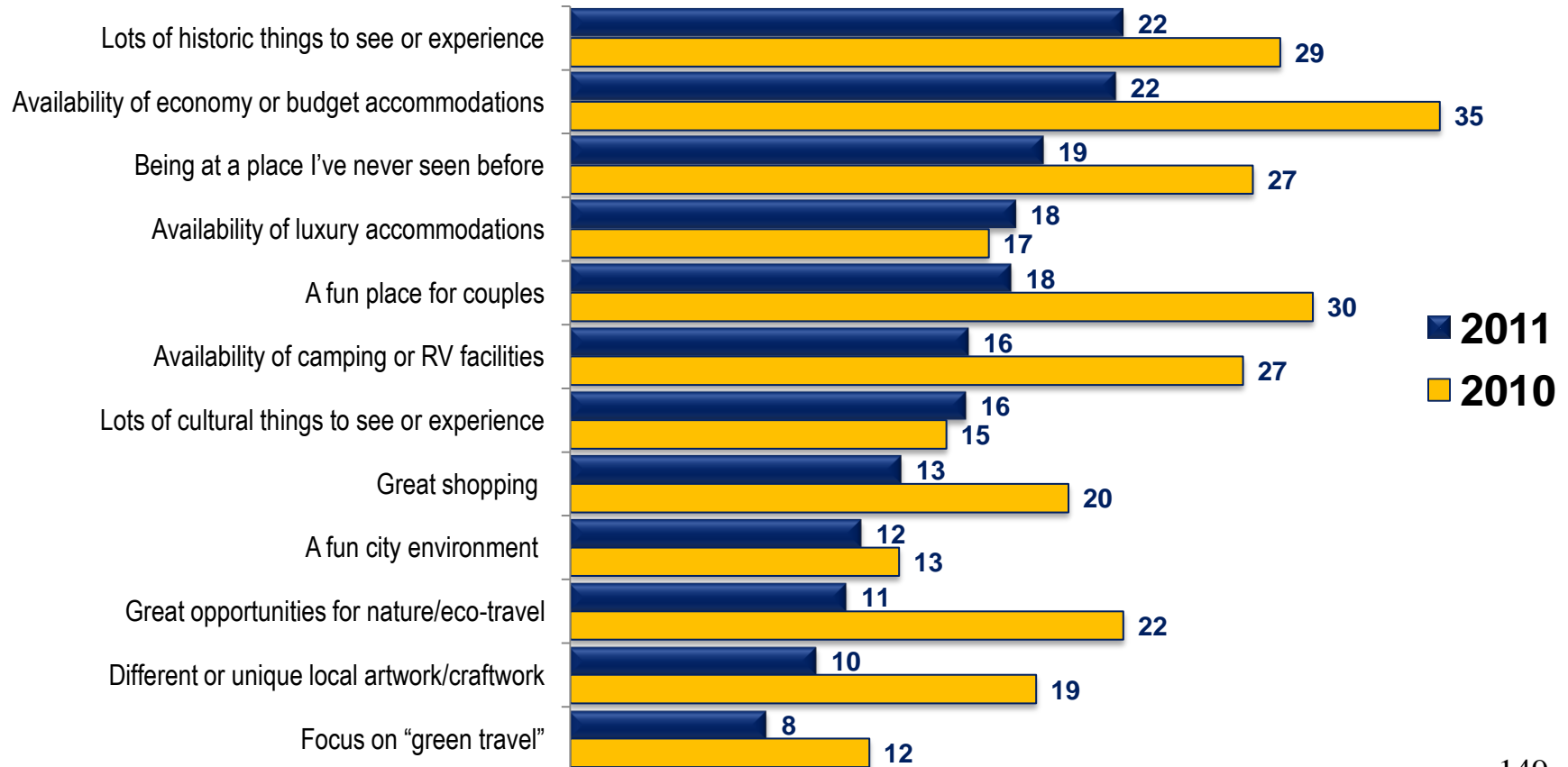
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit The Alleghenies Region (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



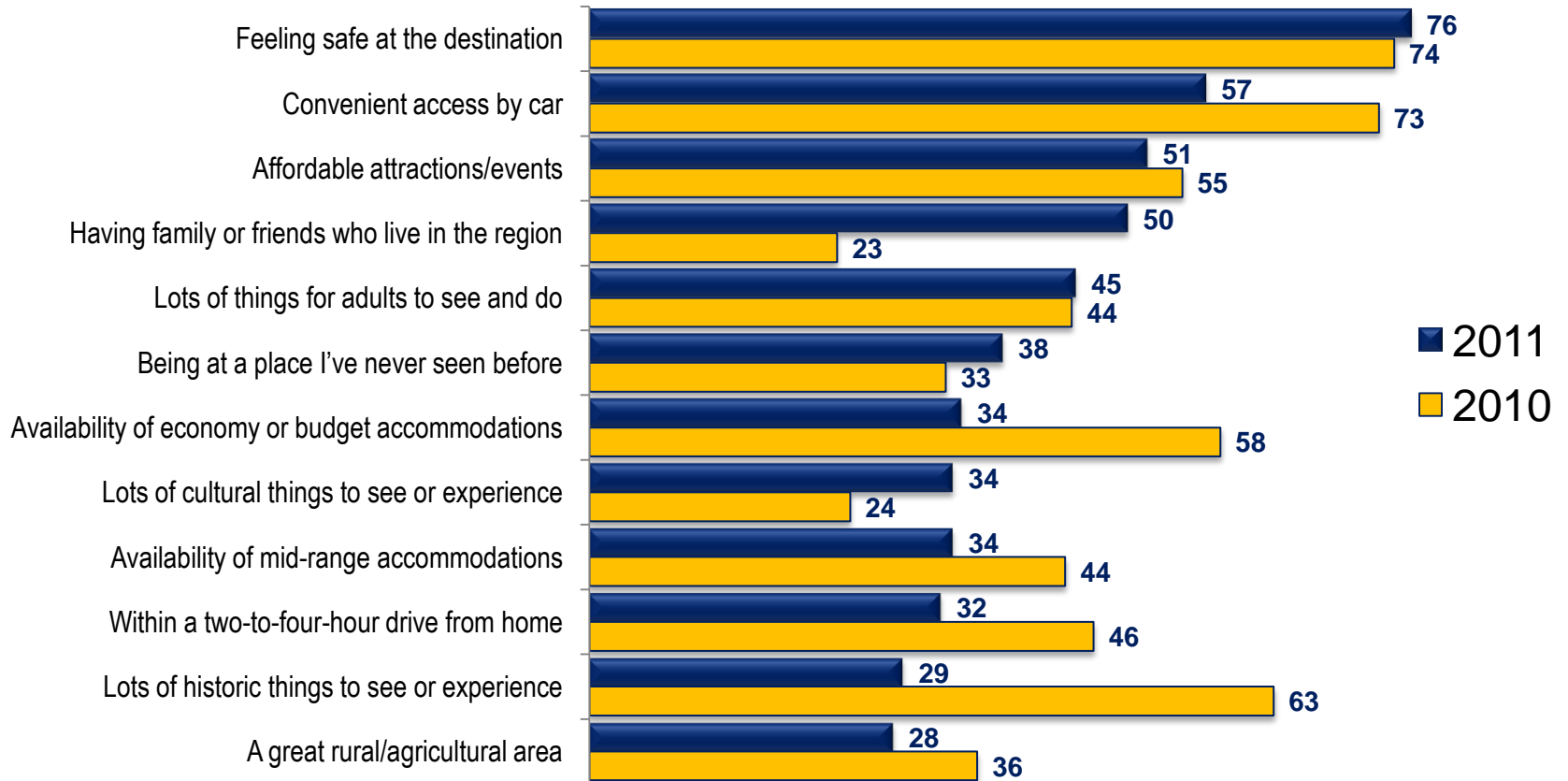
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Upstate PA



Base: Overnight Trips

% Rating Factor As Very Important*



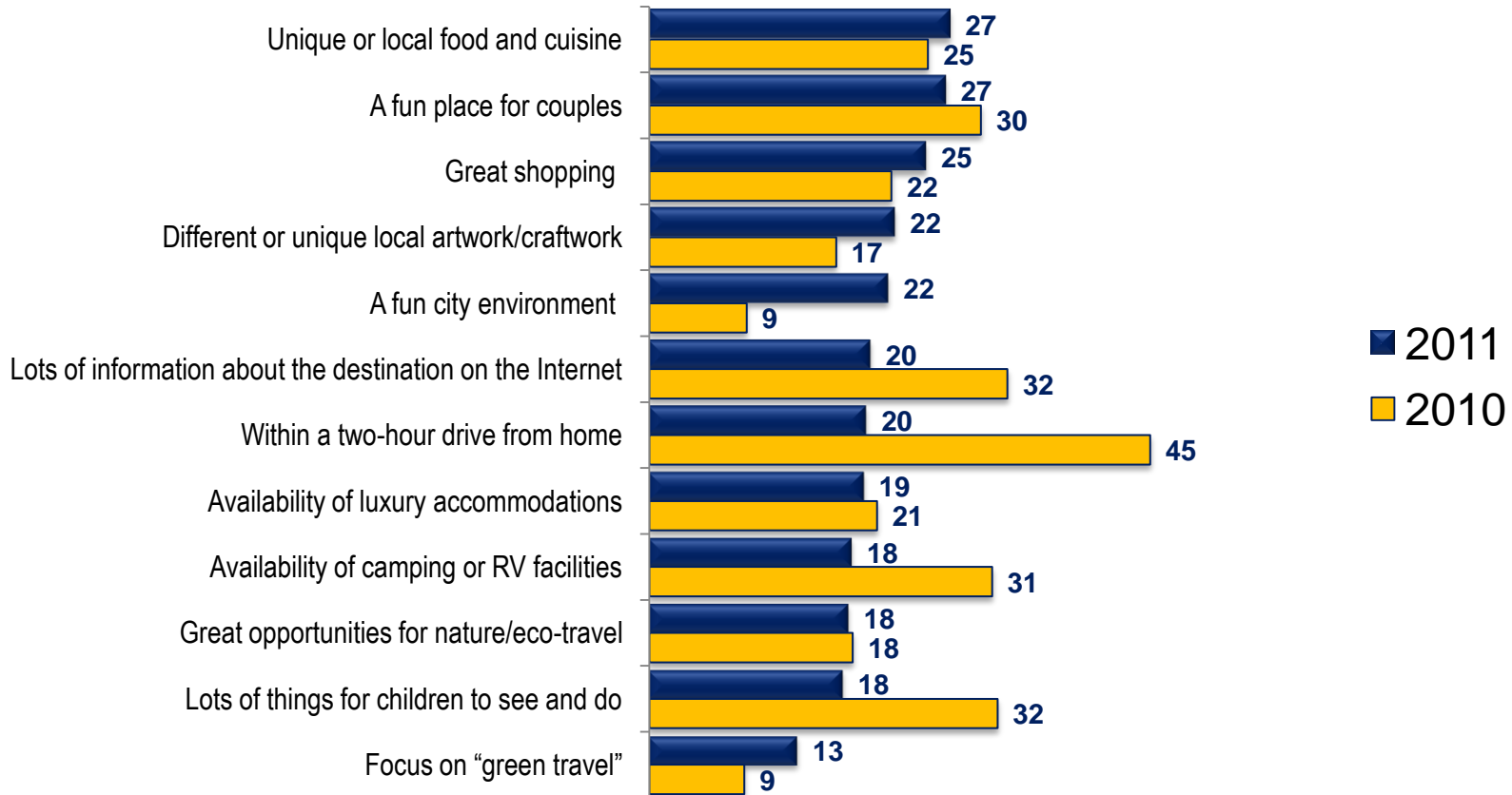
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Upstate PA (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



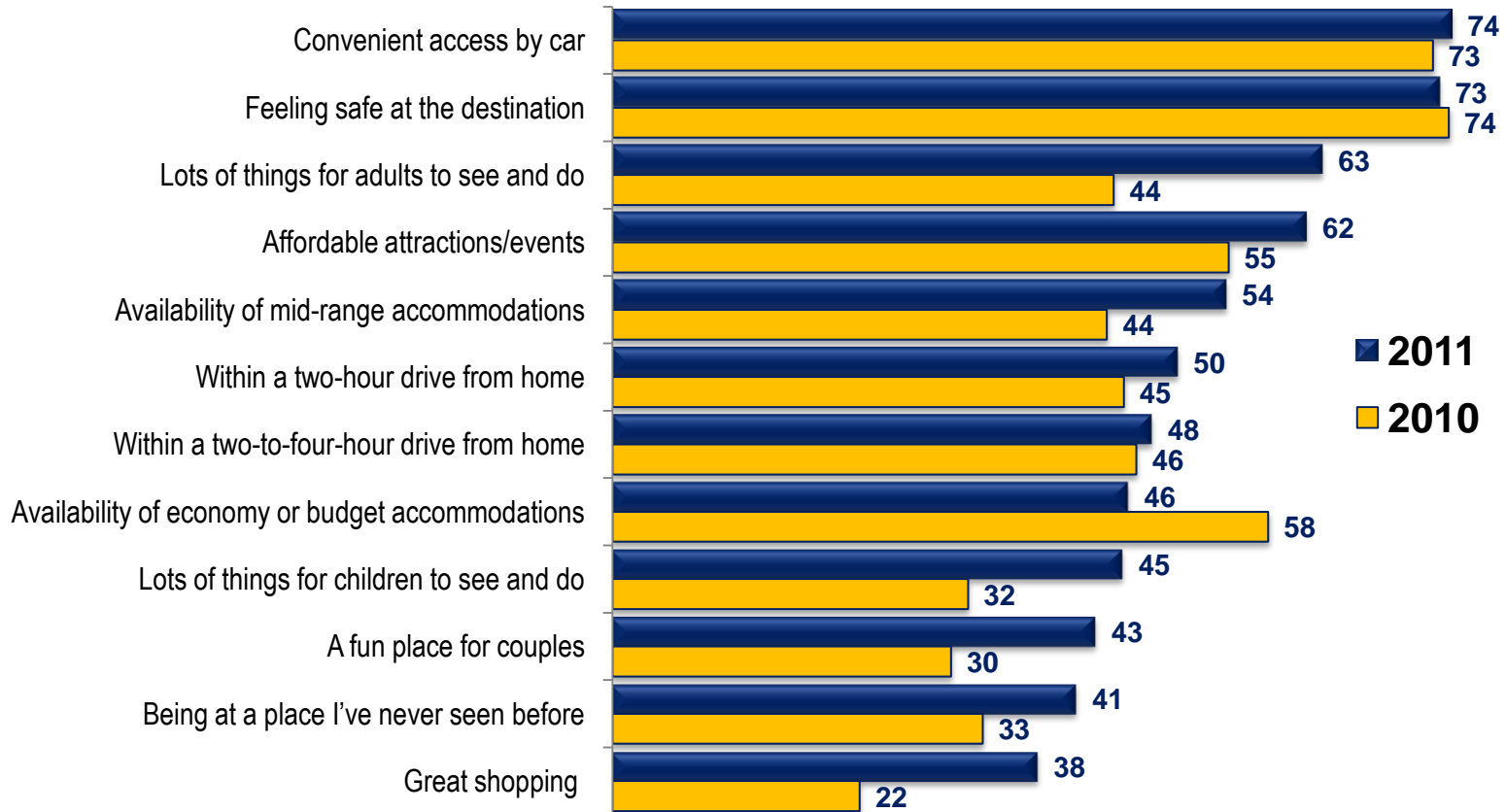
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pocono Mountains



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



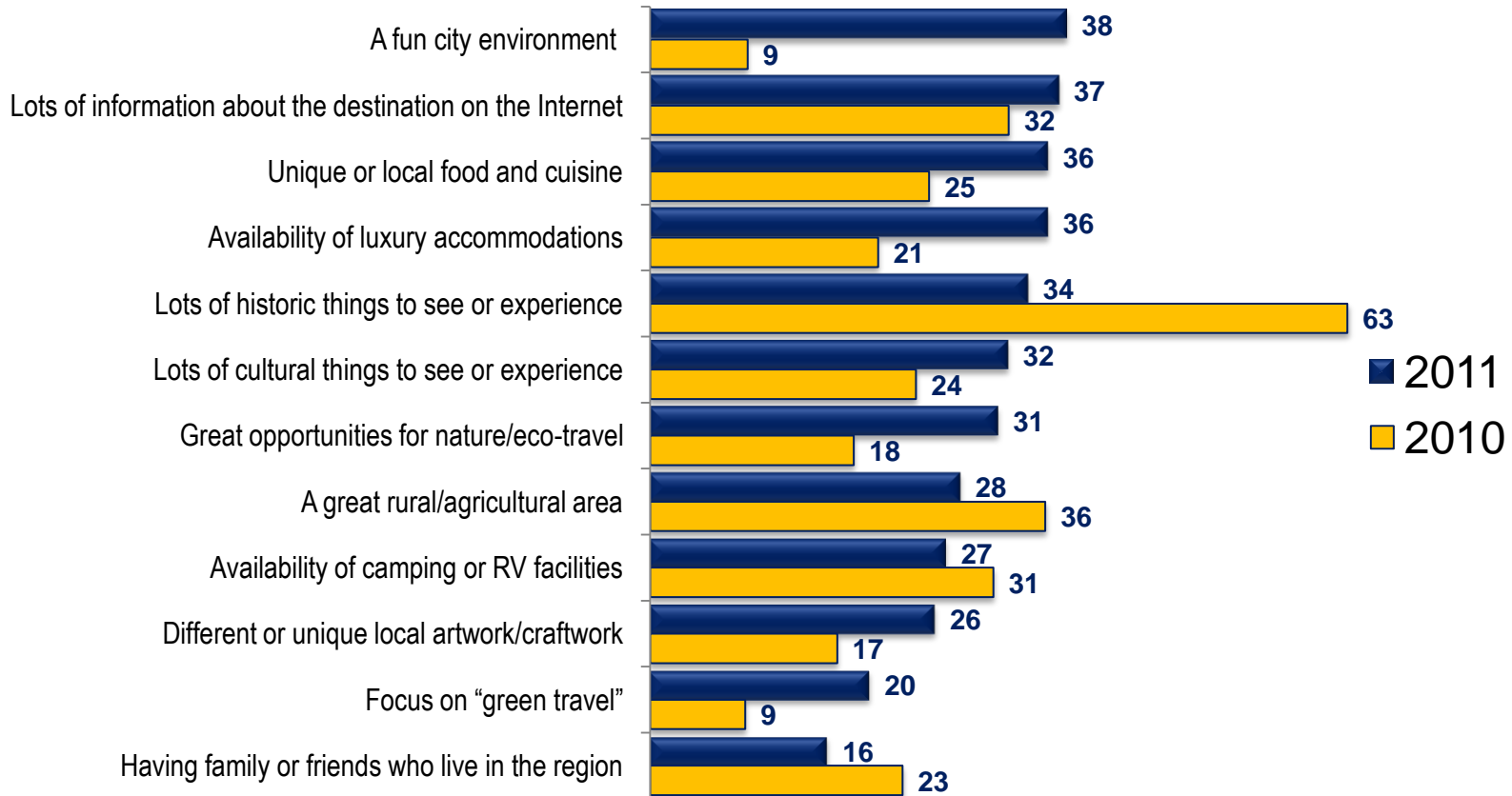
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pocono Mountains (cont'd)



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



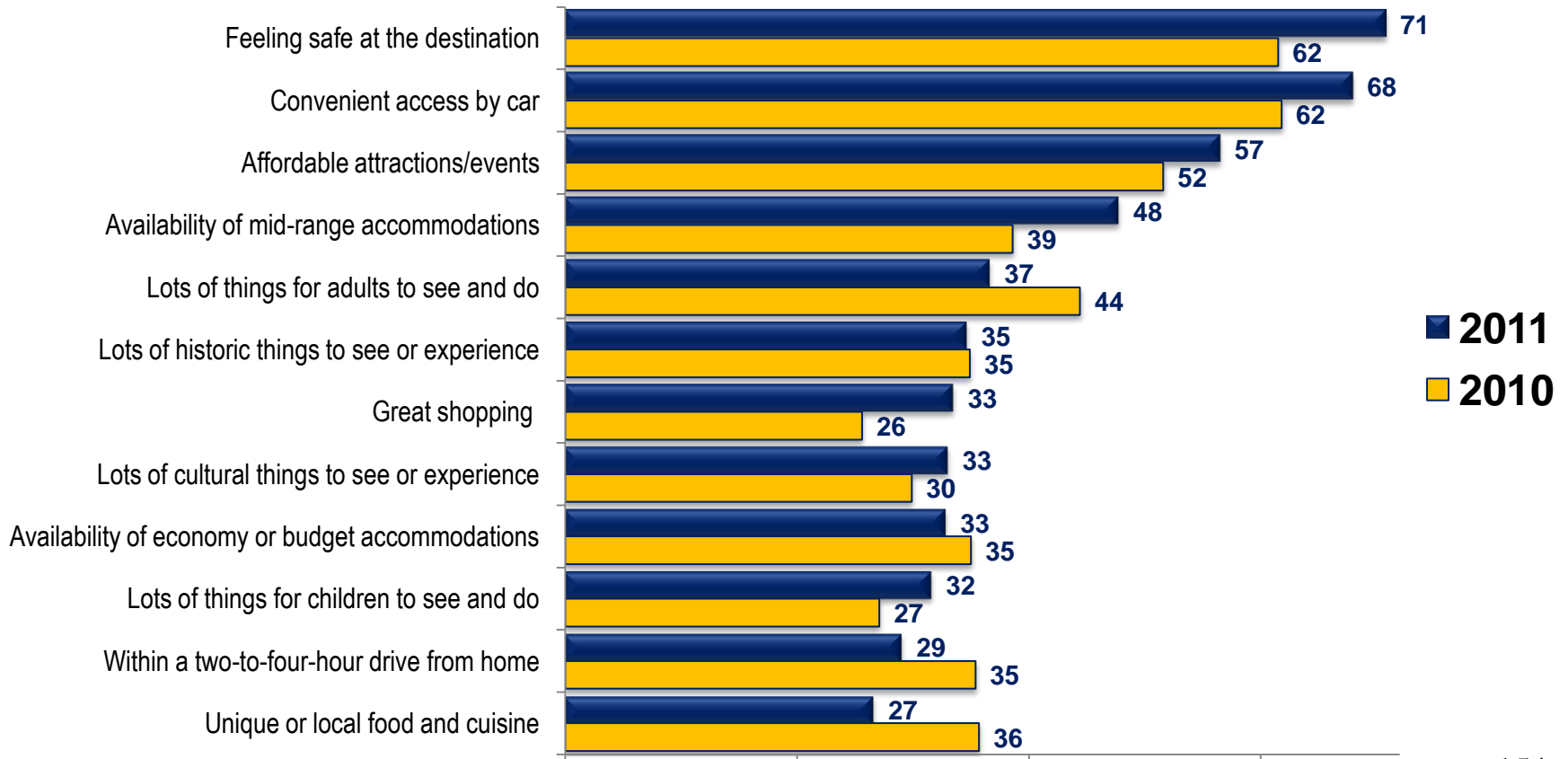
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Dutch Country Roads



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



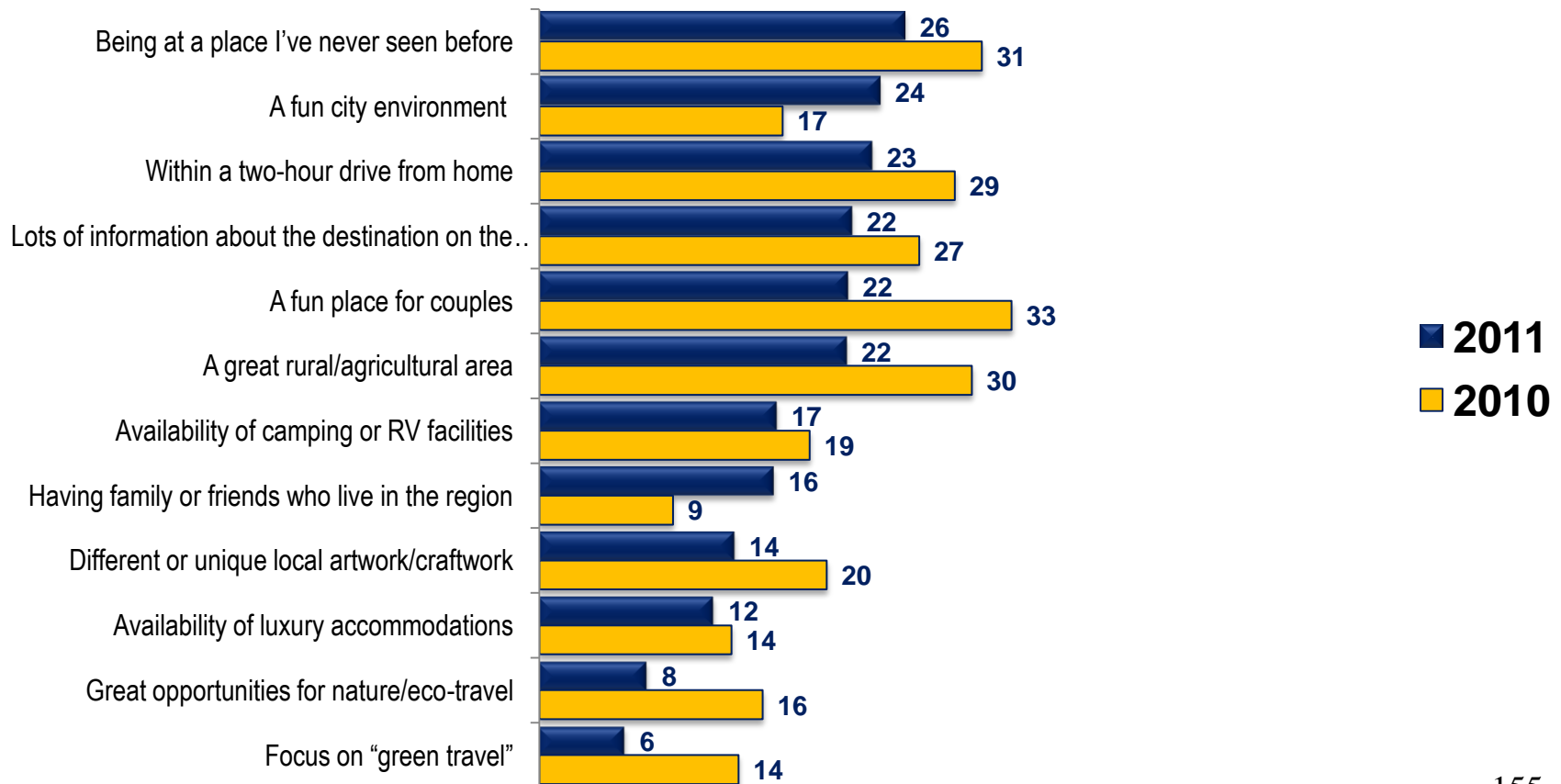
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Dutch Country Roads (cont'd)



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



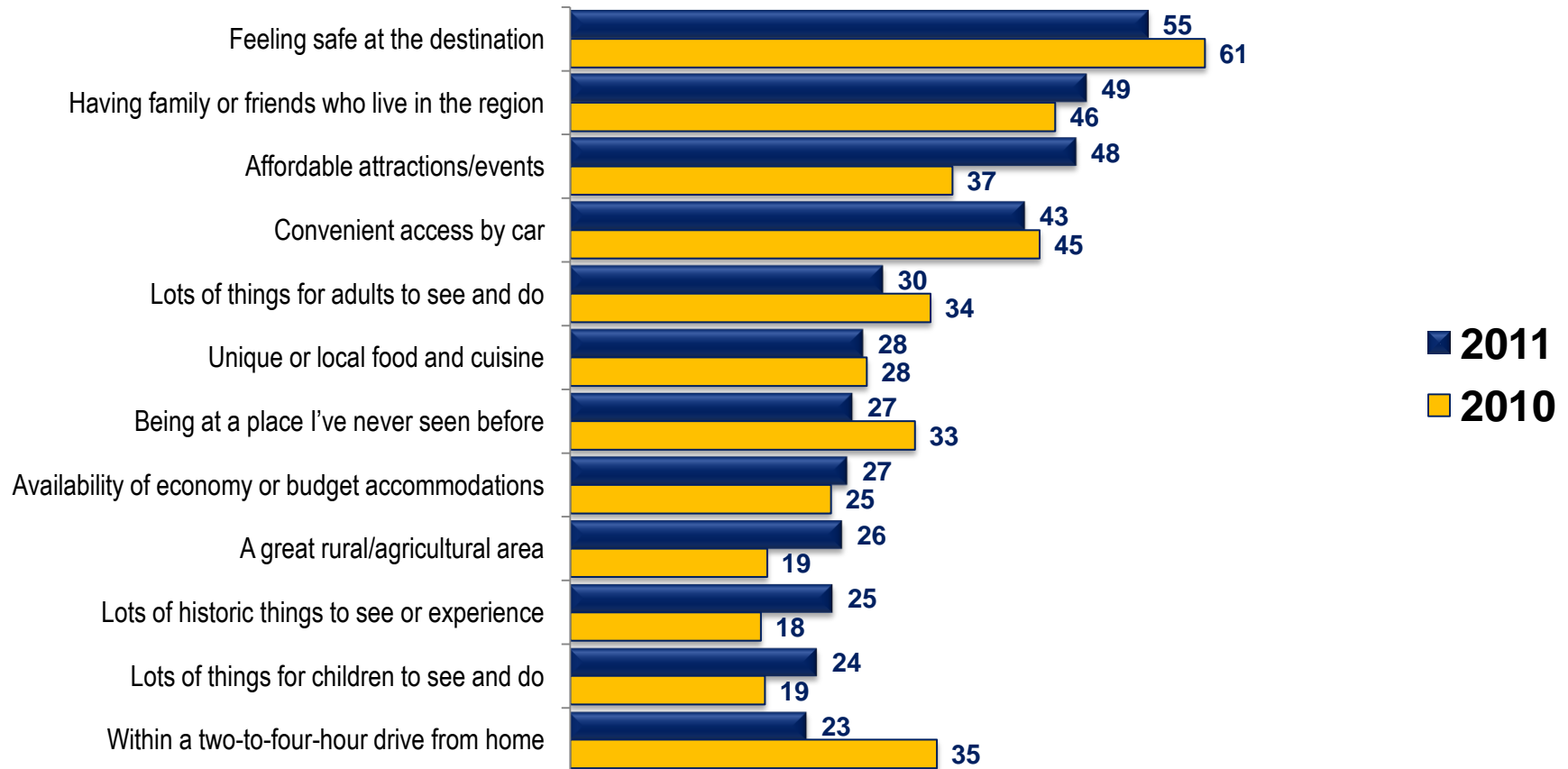
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Lehigh Valley



Base: Overnight Trips

% Rating Factor As Very Important*



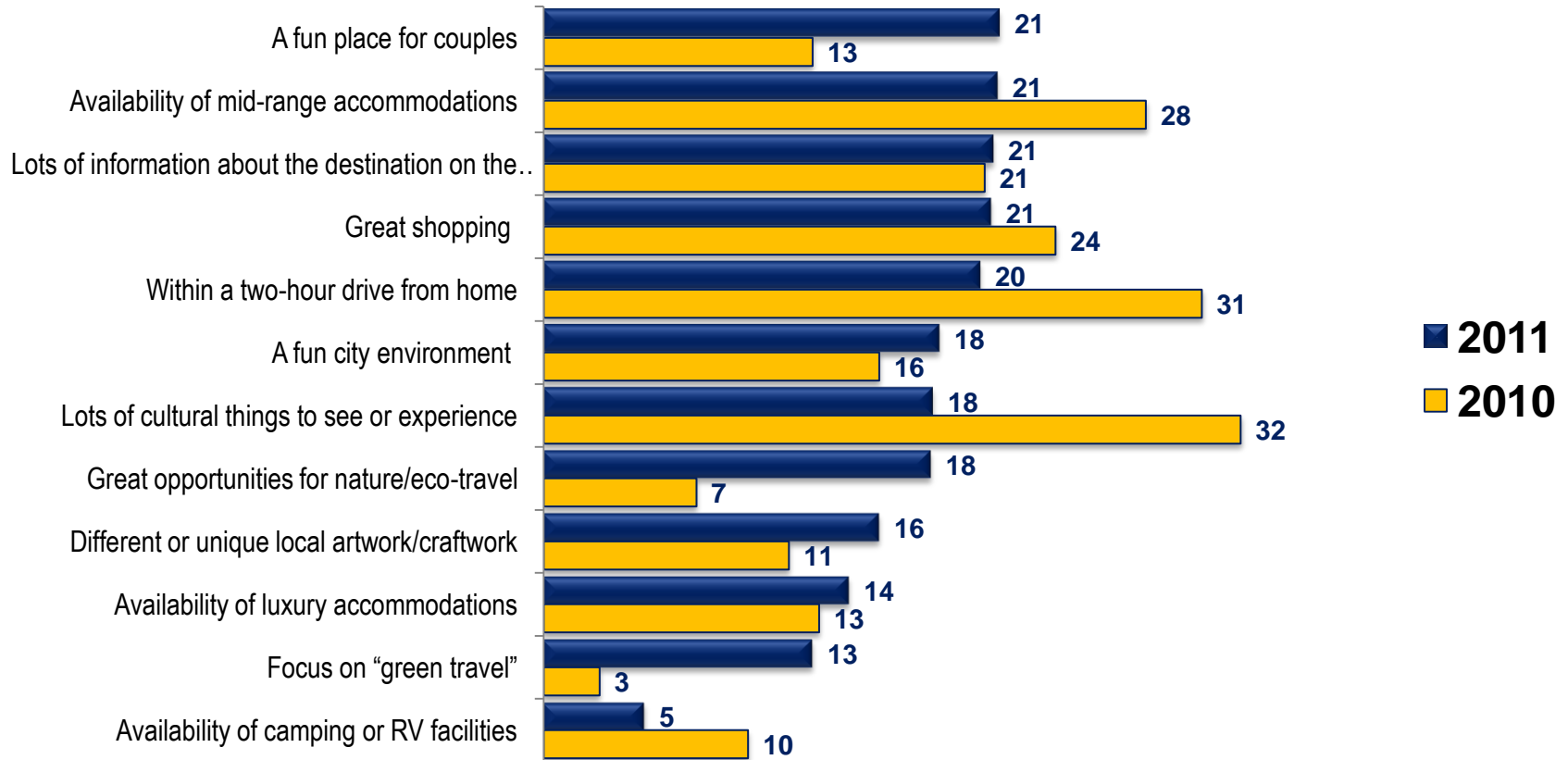
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Lehigh Valley (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important*



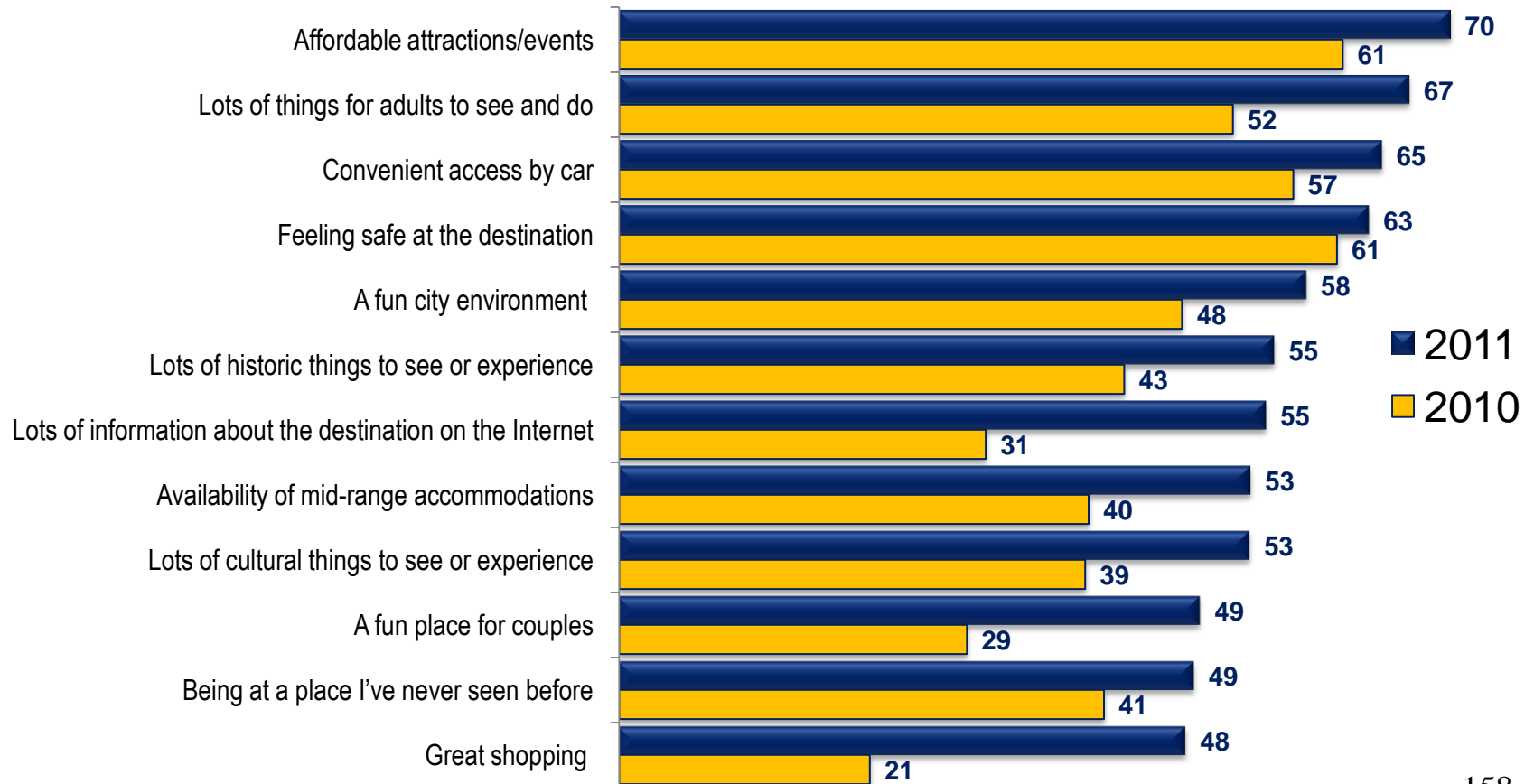
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Philadelphia & The Countryside



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



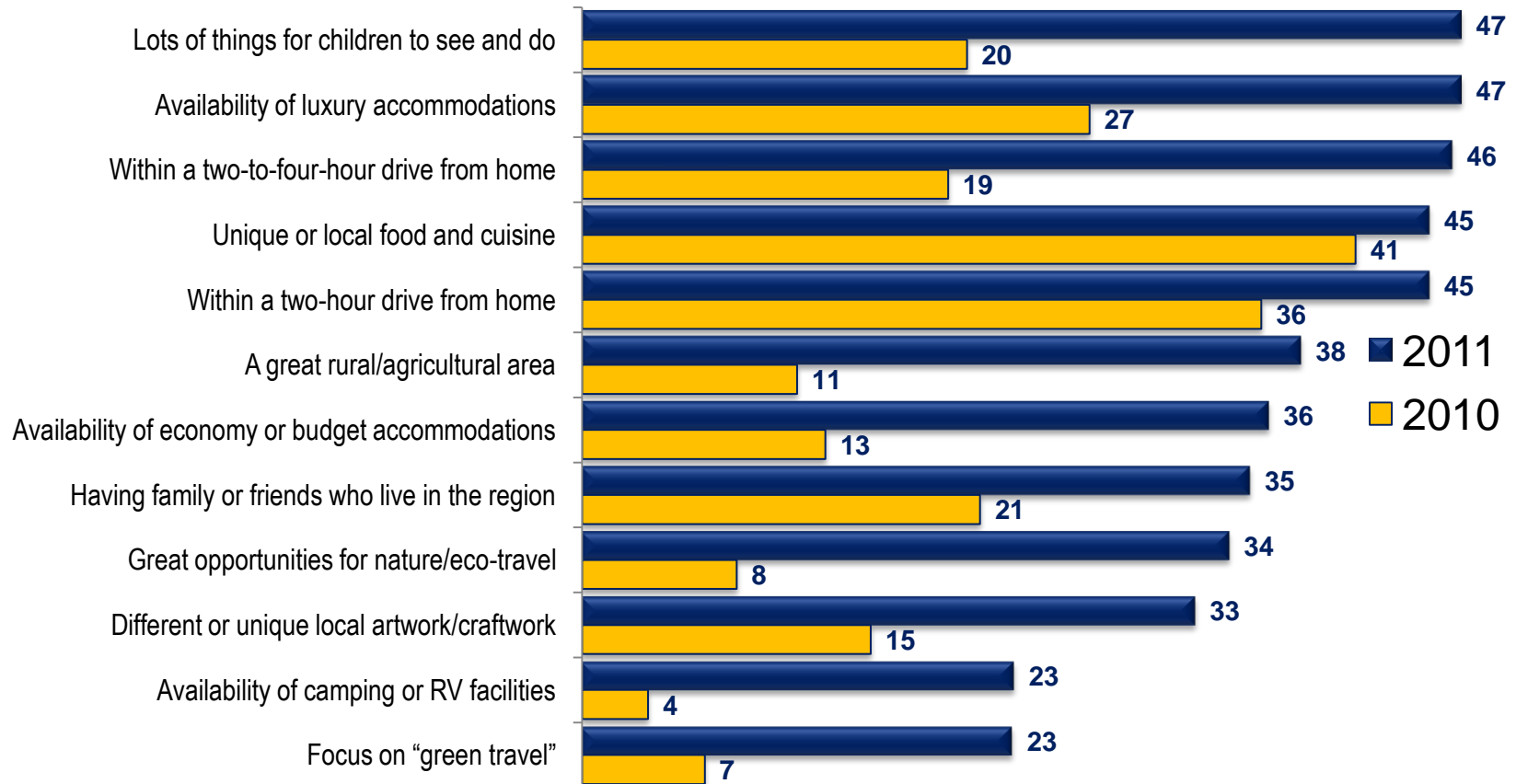
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Philadelphia & The Countryside (cont'd)



Base: Overnight Marketable Trips

% Rating Factor As Very Important*



* Rated 8, 9 or 10 on 10-pt. Importance scale

**Product Delivery —
Marketable Overnight Trips**

Traveller Priorities

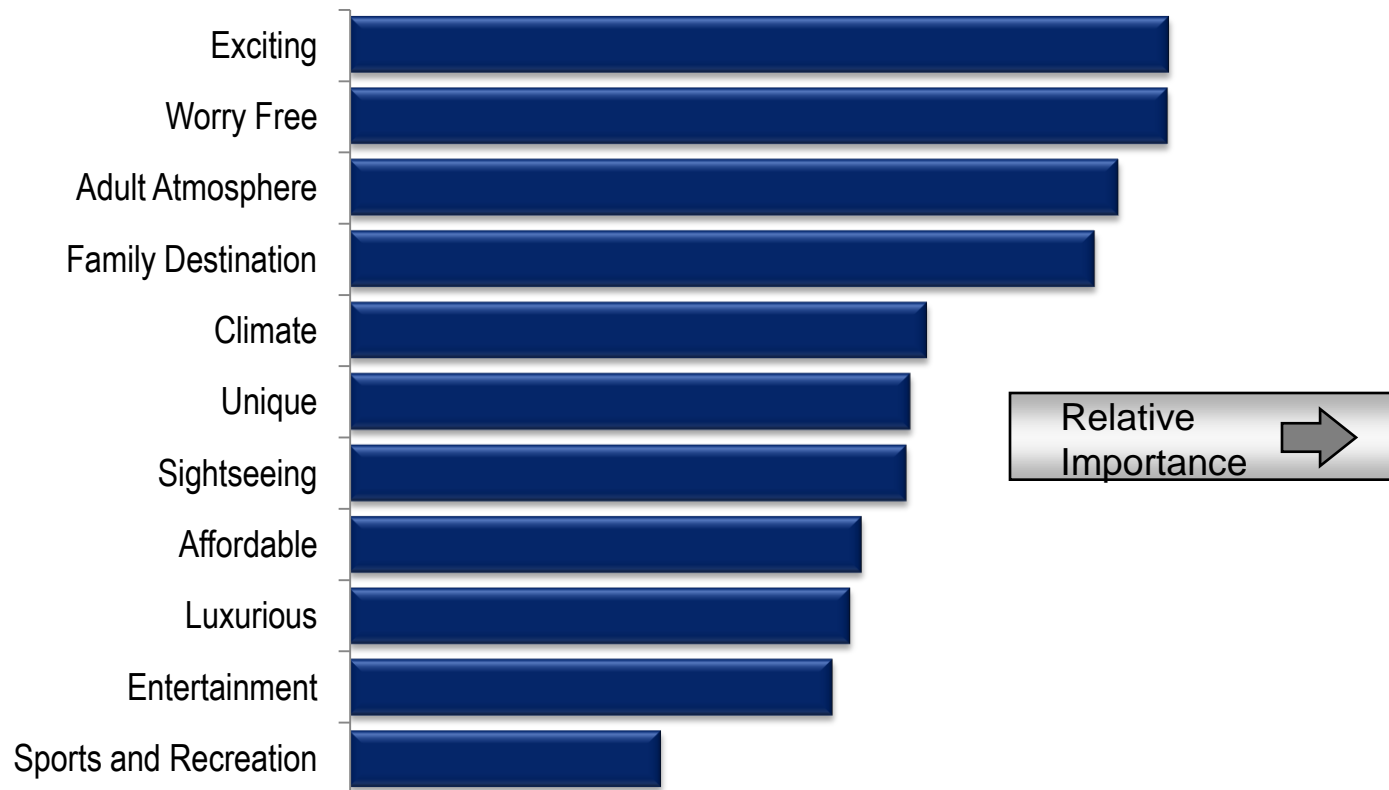


- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- The degree of association between each factor was then measured on whether Pennsylvania is a place “I would really enjoy visiting.”
- In order to get the recent Pennsylvania visitor interested in returning, it is important that the state be perceived as a destination that is exciting, while at the same time is safe, welcoming, attractive to adults, and good for the whole family.

Traveler Priorities



Base: Overnight Marketable Trips



*A measure of the degree of association between each factor and whether Destination is a place "I would really enjoy visiting."

Hot Buttons



1 A place I would feel welcome

2 Lots to see and do

3 Good place to get away and relax

4 A fun place for a vacation/getaway

5 Good place for families to visit

6 Good for adult vacation/getaway

7 Warm/friendly people

8 Exciting destination

9 Very affordable vacation destination

10 Great place for walking/strolling about

11 A good place for couples to visit

12 A place welcoming for children

13 Great value for the money

14 Safe place to travel in tourist areas

15 A fun place for kids

16 Great shopping

Product Delivery



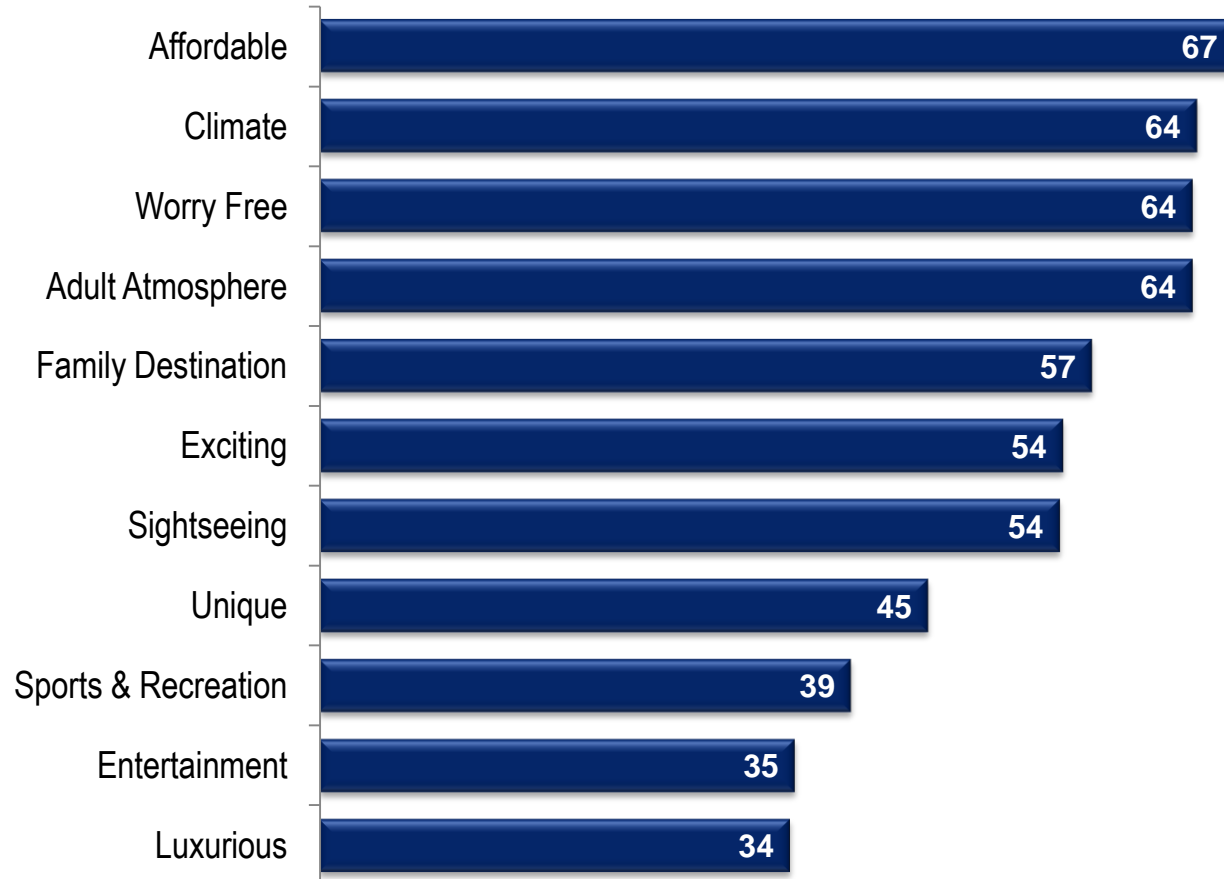
- ◉ Image ratings by recent visitors can be viewed as product ratings such that the recent visitor is, presumably, rating Pennsylvania from his/her experience.
- ◉ Recent visitors to Pennsylvania feel that its image's strengths include a travel experience that offers great live music, is a place they would feel welcome, is good place for families, is welcoming for children, and has wilderness areas.

Pennsylvania's Product Delivery



Base: Overnight Marketable Trips

Percent Who Strongly Agree

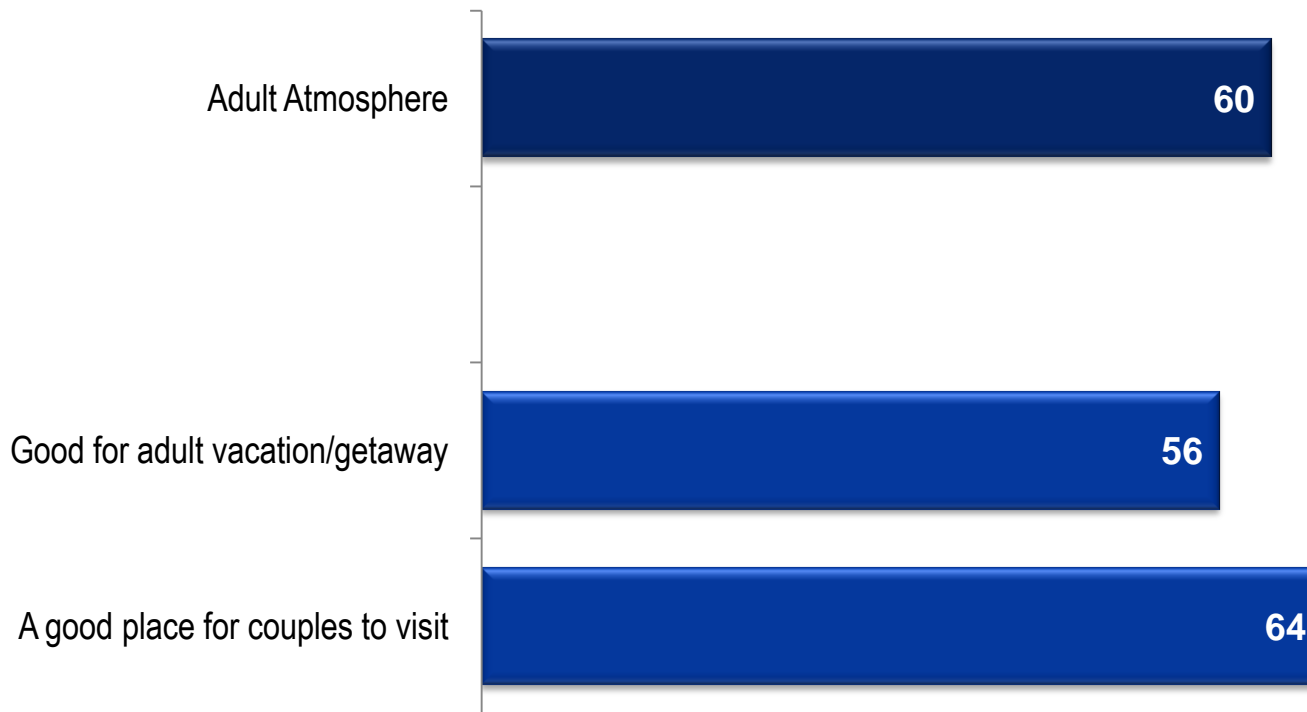


Pennsylvania's Product Delivery — Adult Atmosphere



Base: Overnight Marketable Trips

Percent Who Strongly Agree

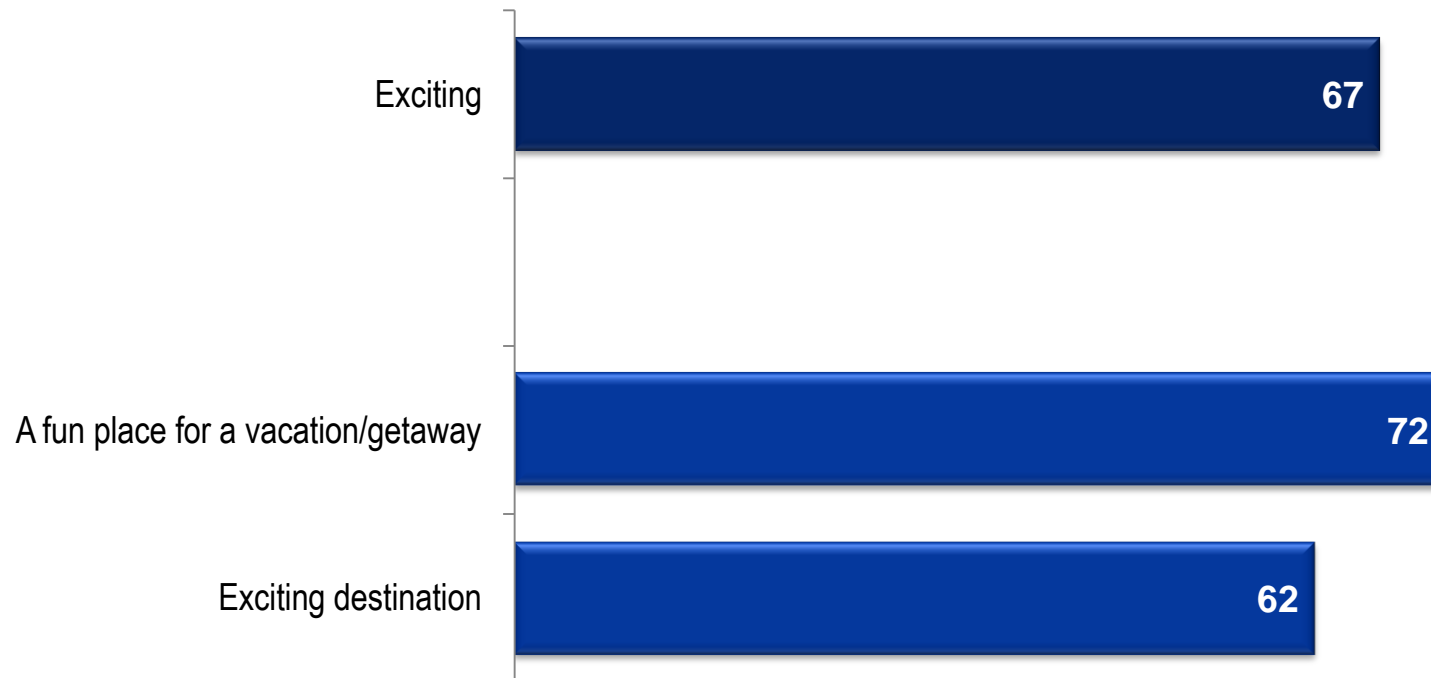


Pennsylvania's Product Delivery — Exciting



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Worry Free



Base: Overnight Marketable Trips

Percent Who Strongly Agree

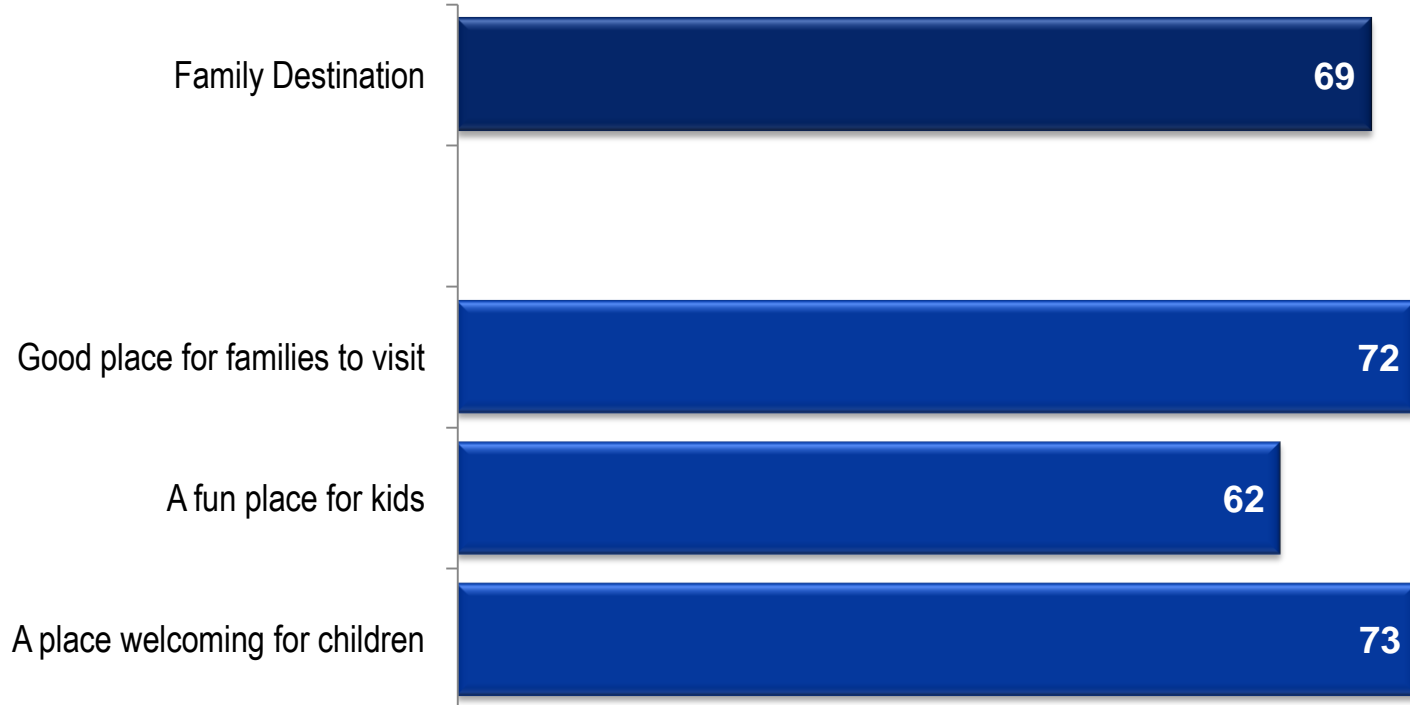


Pennsylvania's Product Delivery — Family Destination



Base: Overnight Marketable Trips

Percent Who Strongly Agree

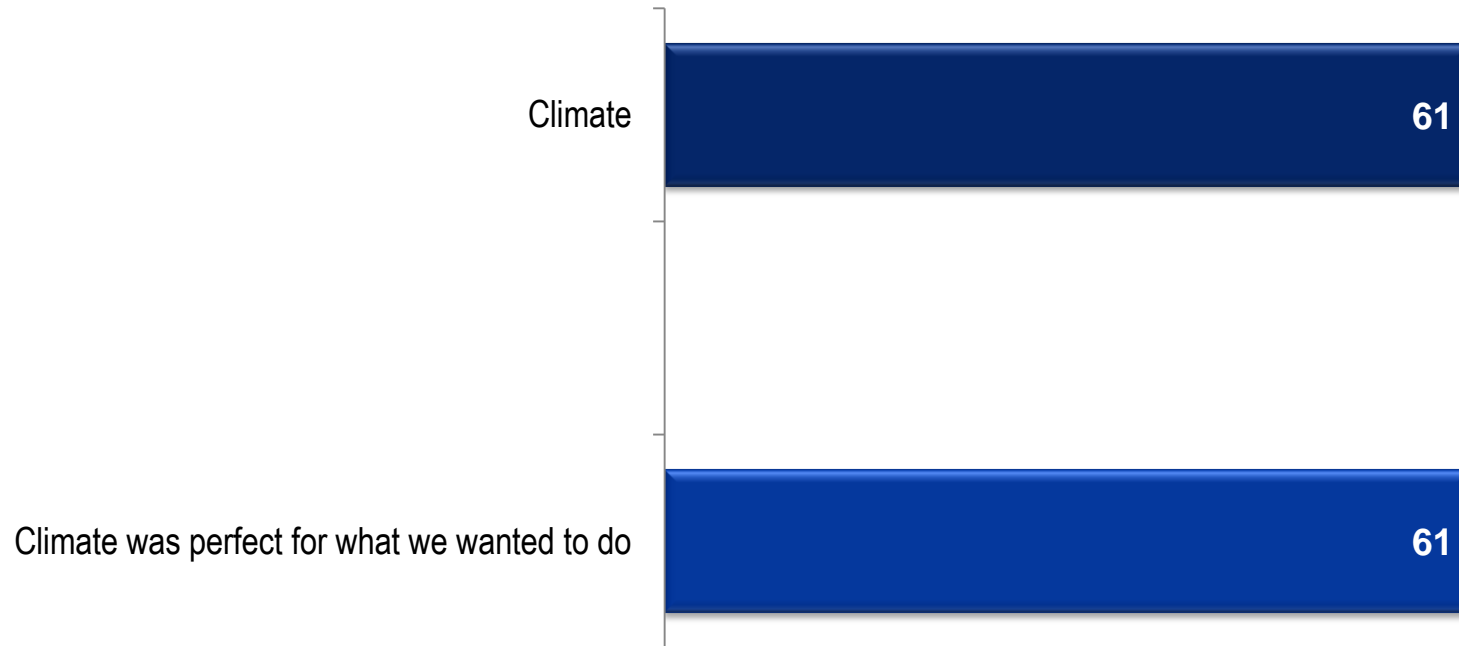


Pennsylvania's Product Delivery — Climate



Base: Overnight Marketable Trips

Percent Who Strongly Agree

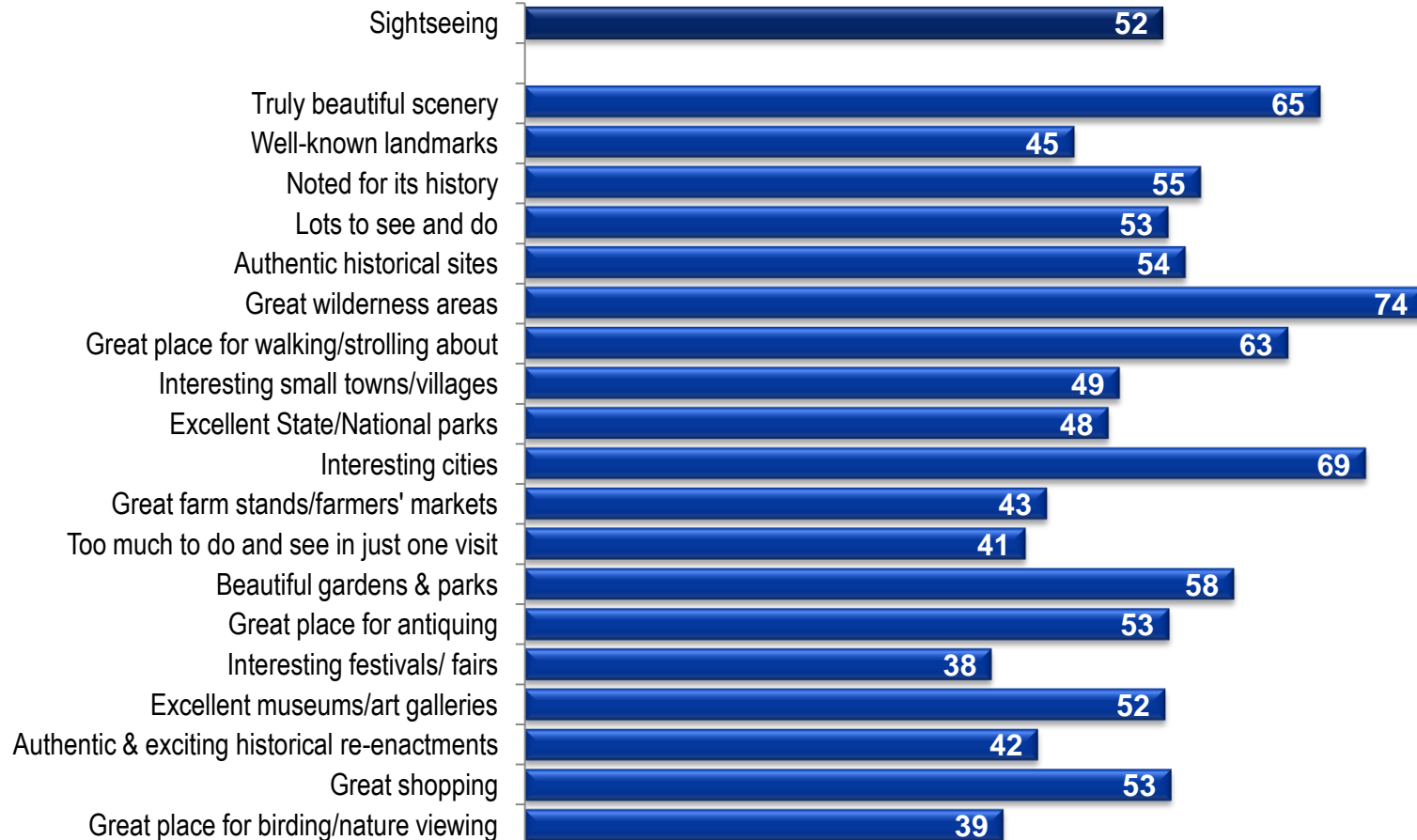


Pennsylvania's Product Delivery — Sightseeing



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Affordable



Base: Overnight Marketable Trips

Percent Who Strongly Agree

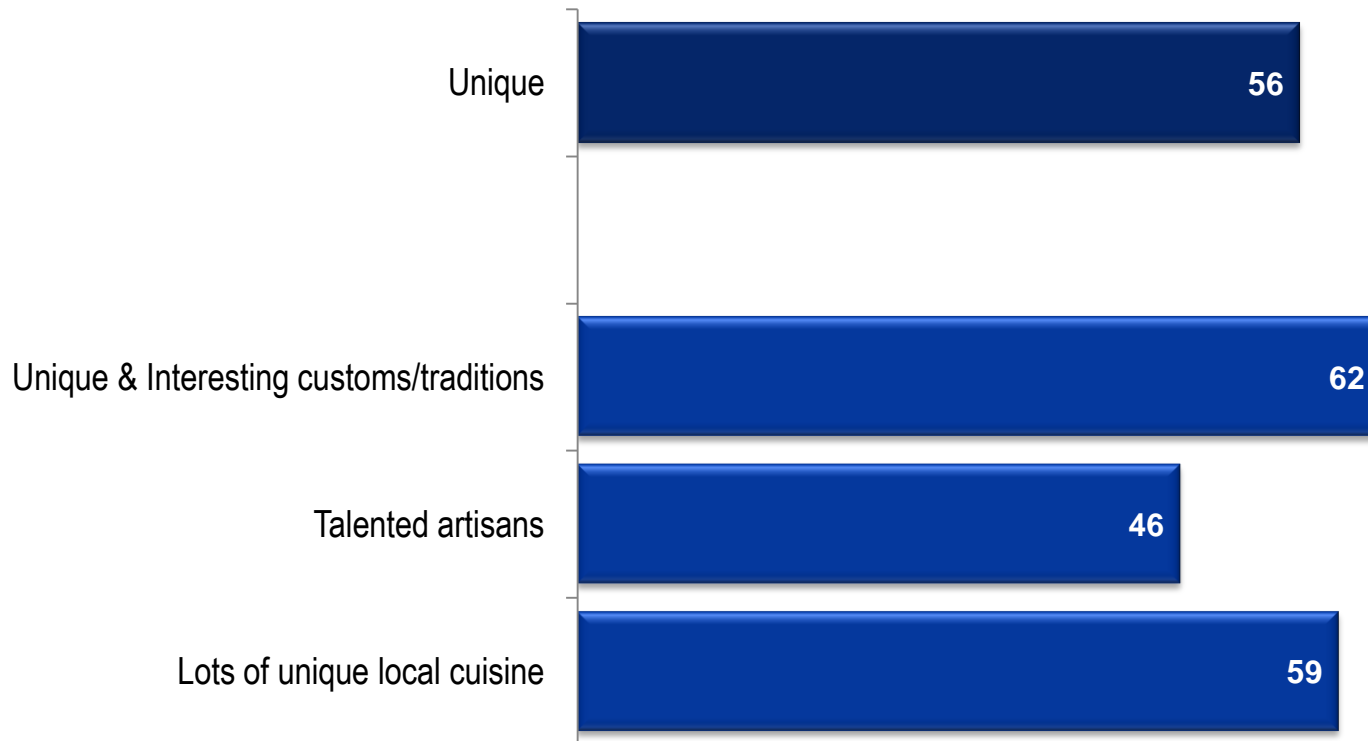


Pennsylvania's Product Delivery — Unique



Base: Overnight Marketable Trips

Percent Who Strongly Agree

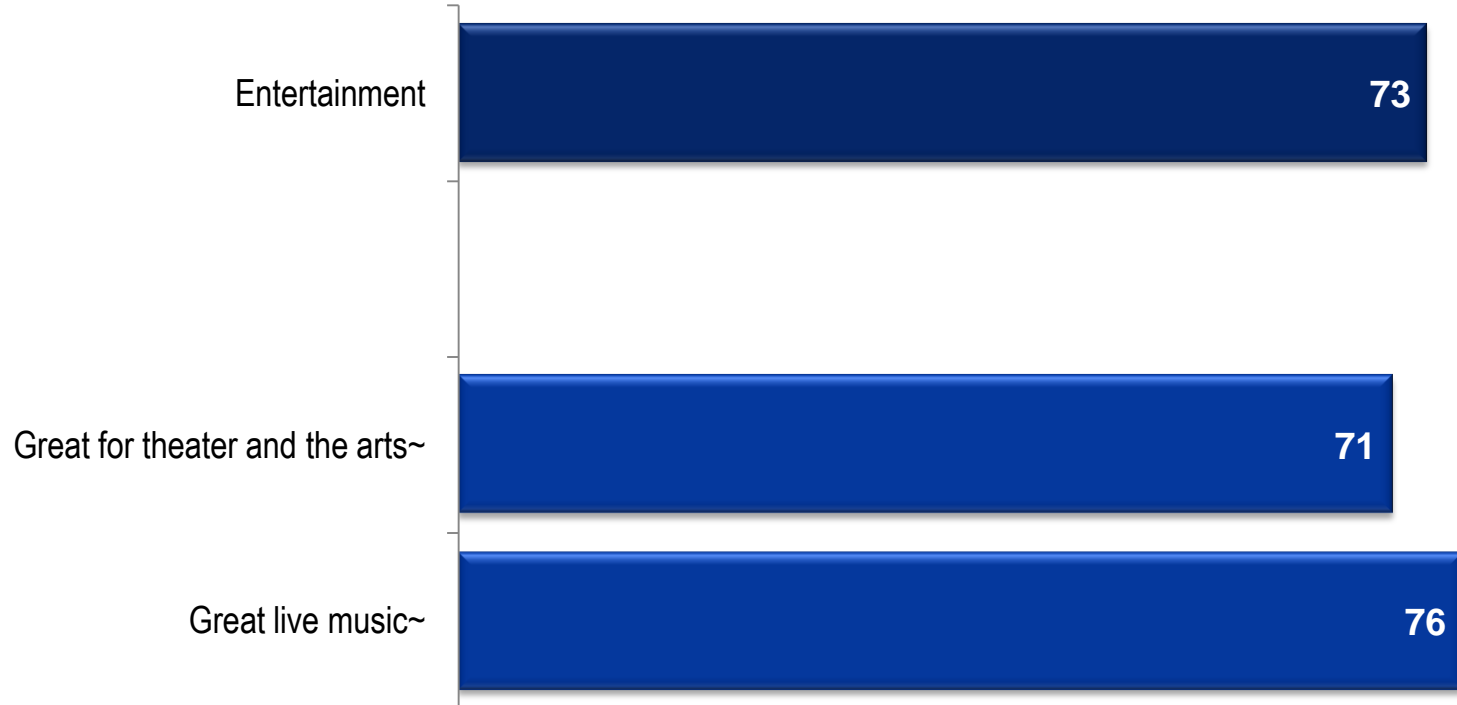


Pennsylvania's Product Delivery — Entertainment



Base: Overnight Marketable Trips

Percent Who Strongly Agree

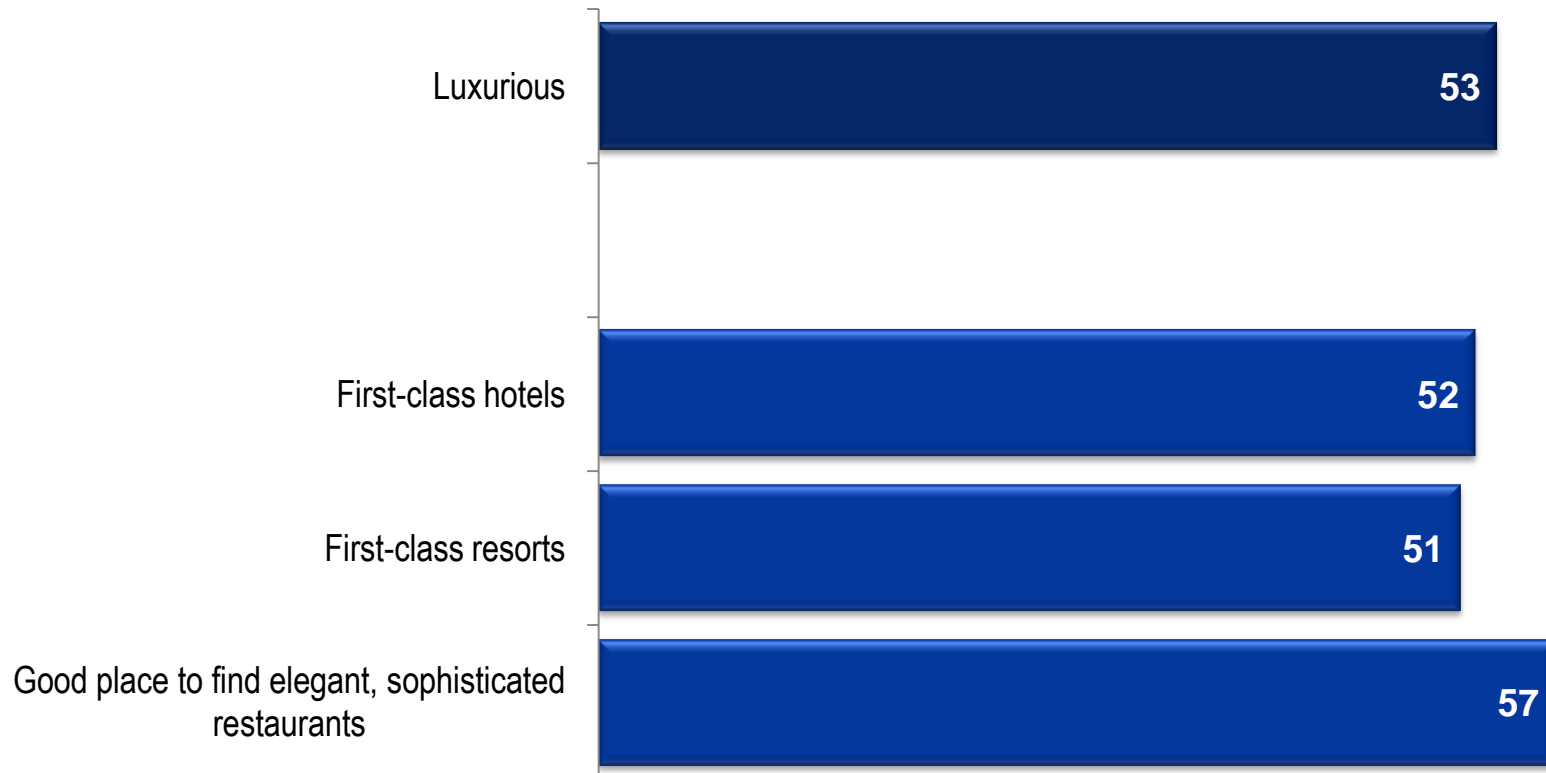


Pennsylvania's Product Delivery — Luxurious



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Sports & Recreation



Base: Overnight Marketable Trips

Percent Who Strongly Agree

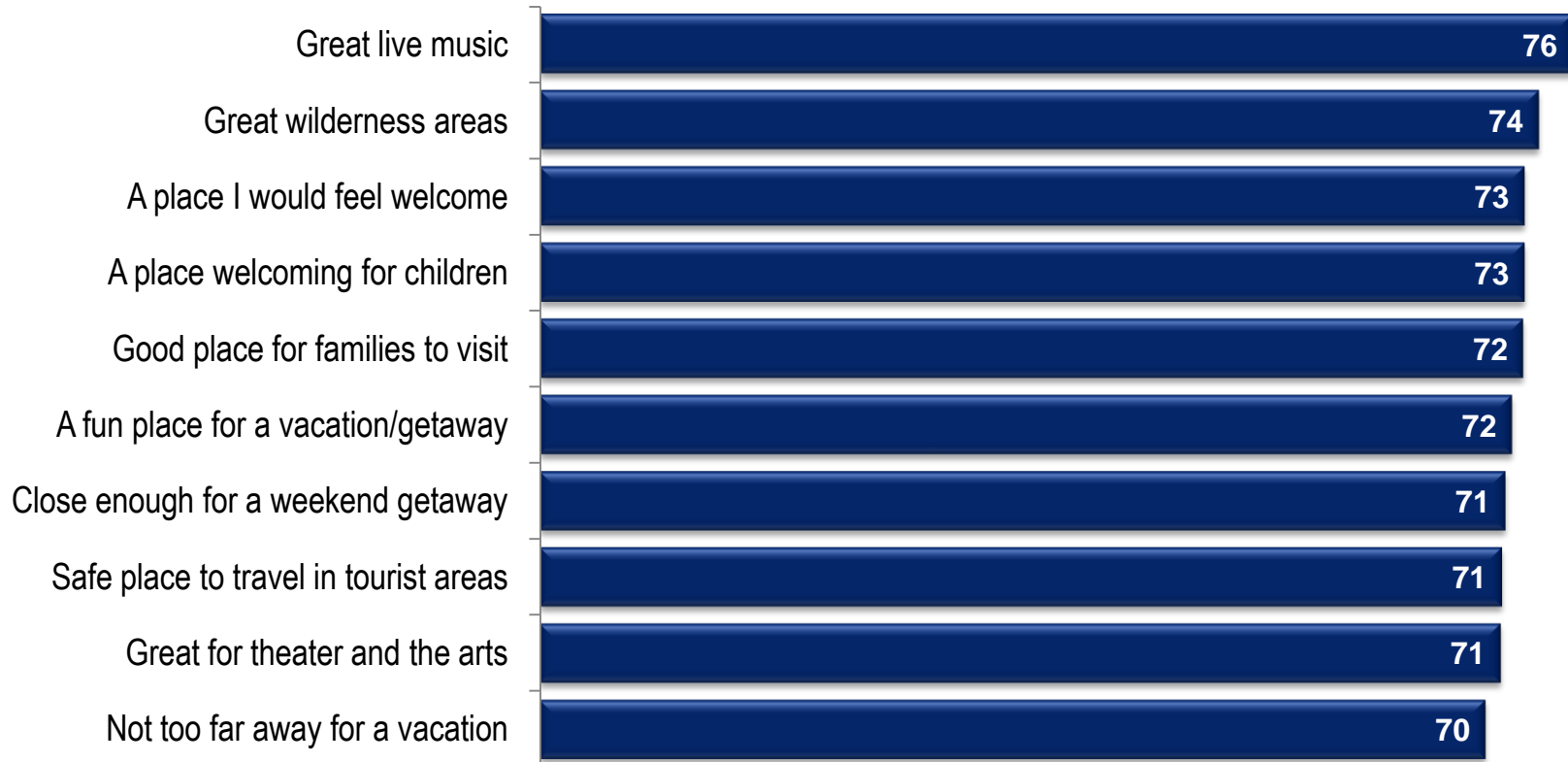


Pennsylvania's Top 20 Image Attributes



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Top 20 Image Attributes (cont'd)



Base: Overnight Marketable Trips

Percent Who Strongly Agree

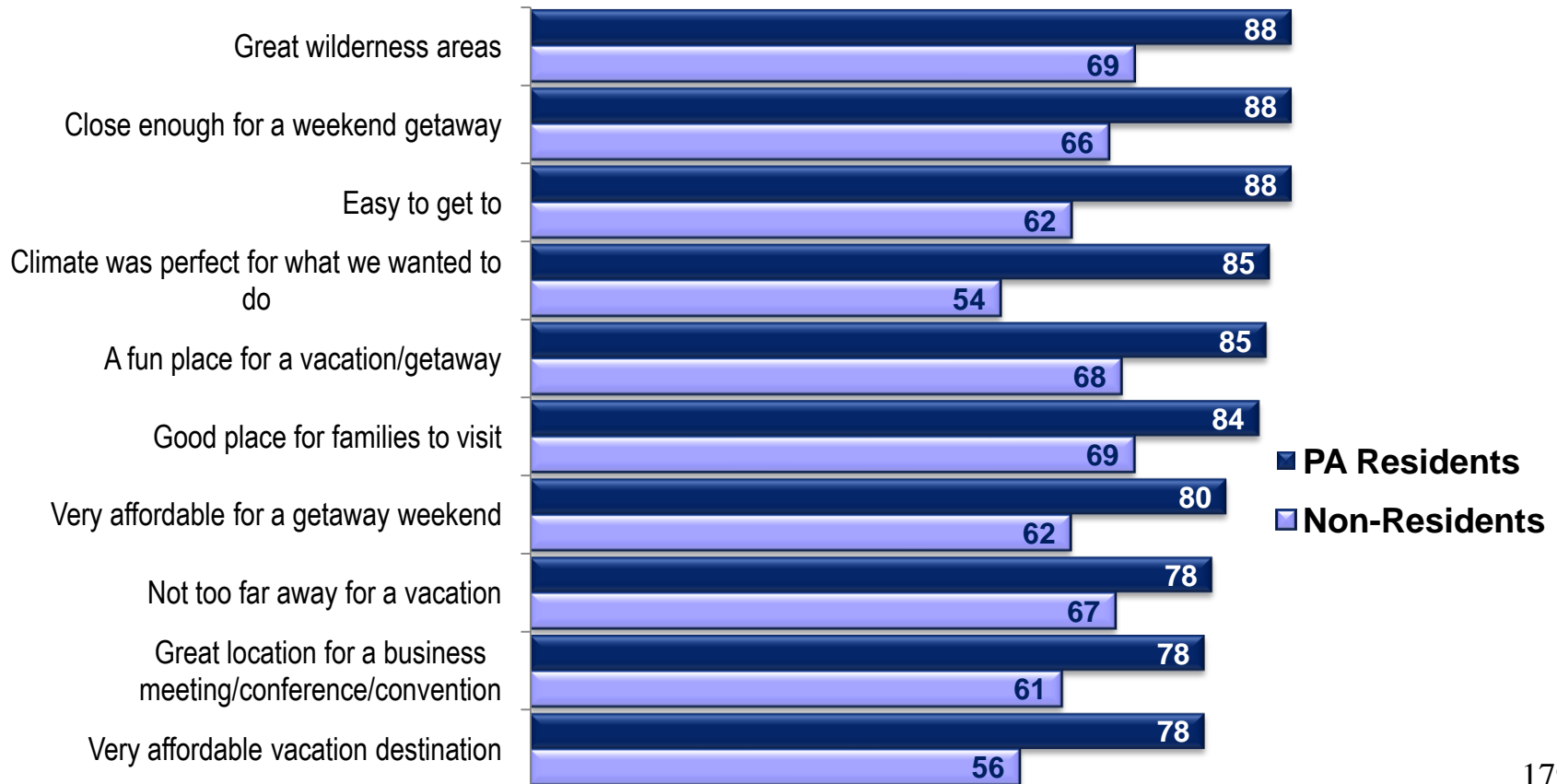


Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents



Base: Overnight Marketable Trips

Percent who strongly agree

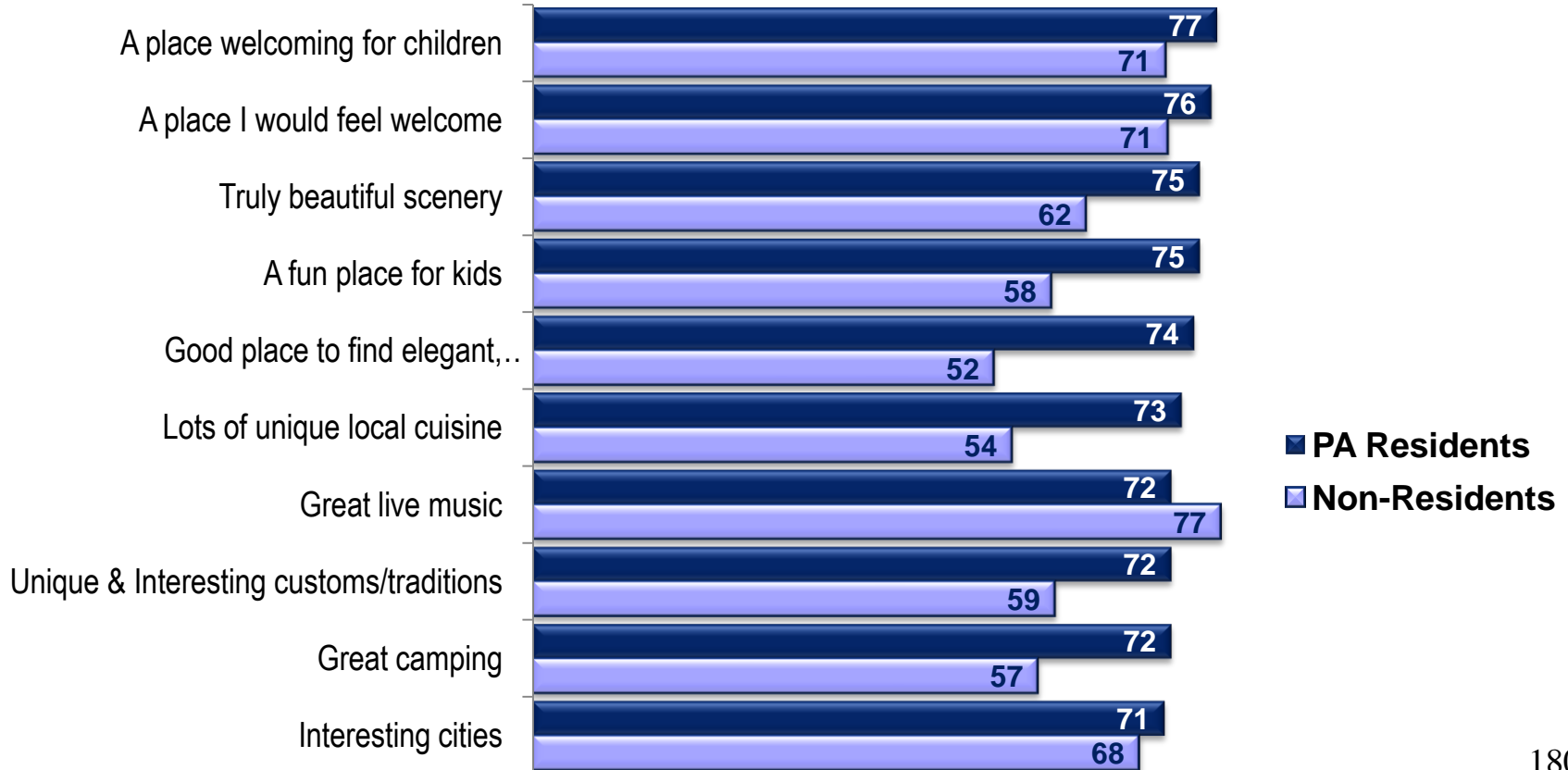


Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents (cont'd)



Base: Overnight Marketable Trips

Percent who strongly agree

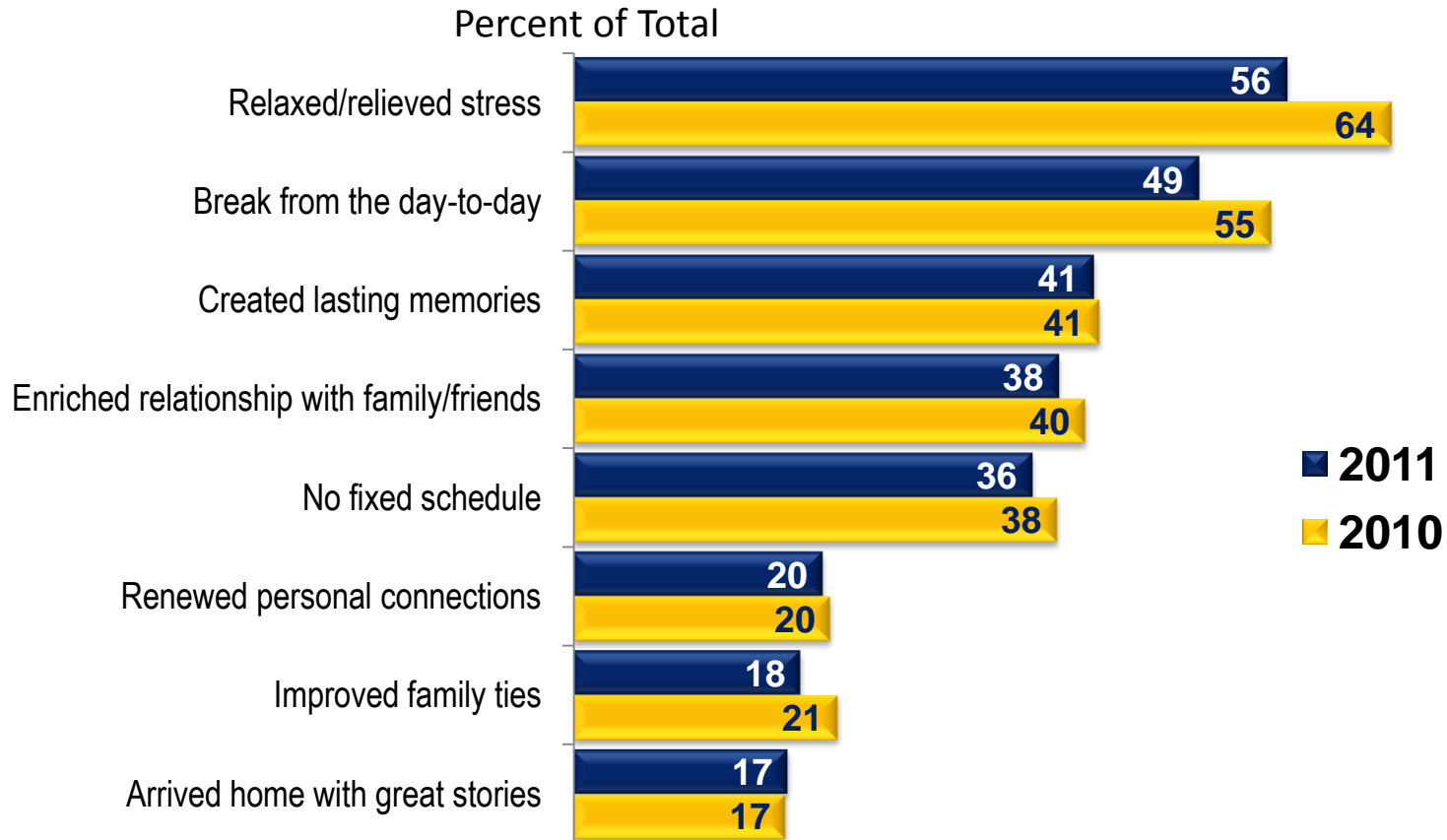


Trip Benefits — Marketable Overnight Trips

Benefits From Pennsylvania Overnight Trip



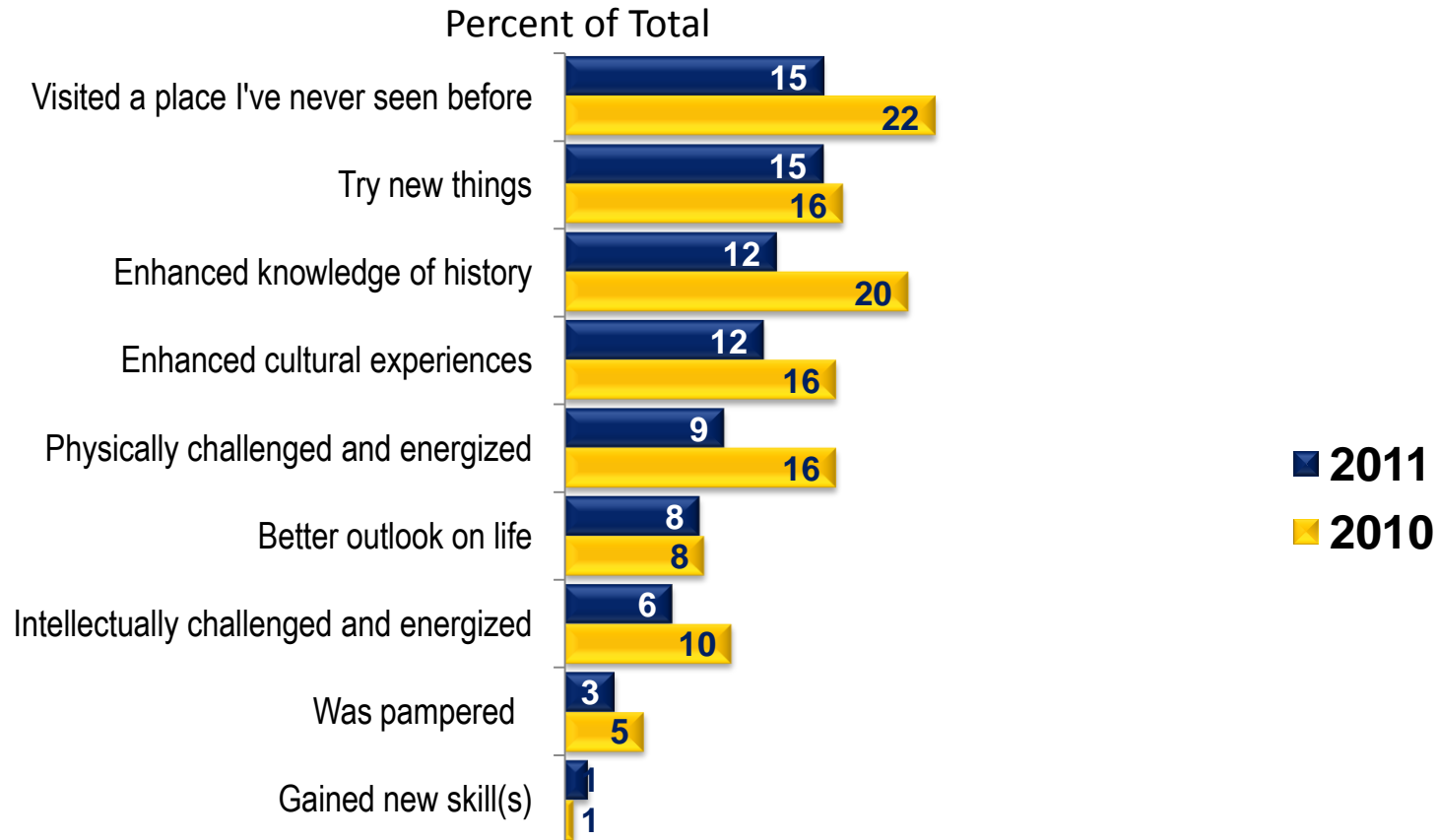
Base: Overnight Marketable Trips



Benefits From Pennsylvania Overnight Trip (cont'd)



Base: Overnight Marketable Trips



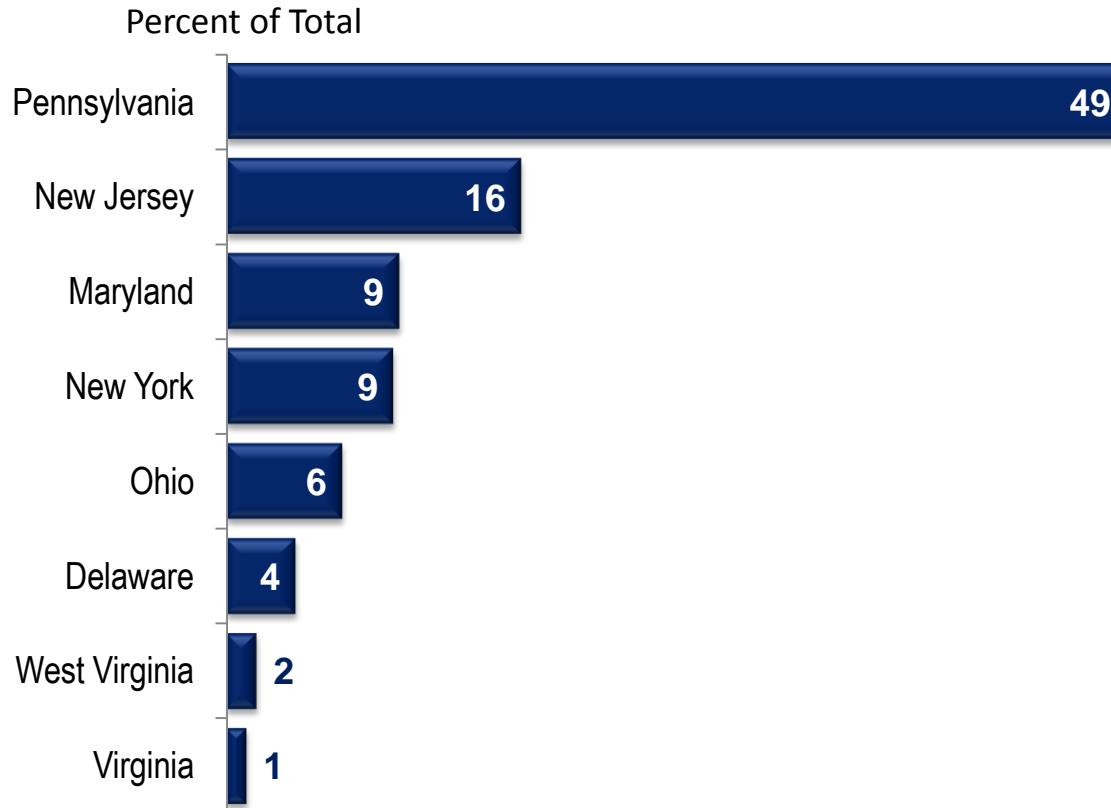
Pennsylvania Day-Trips

Origin Markets — Pennsylvania Day-Trips

State Origin Markets – Marketable Day-Trips



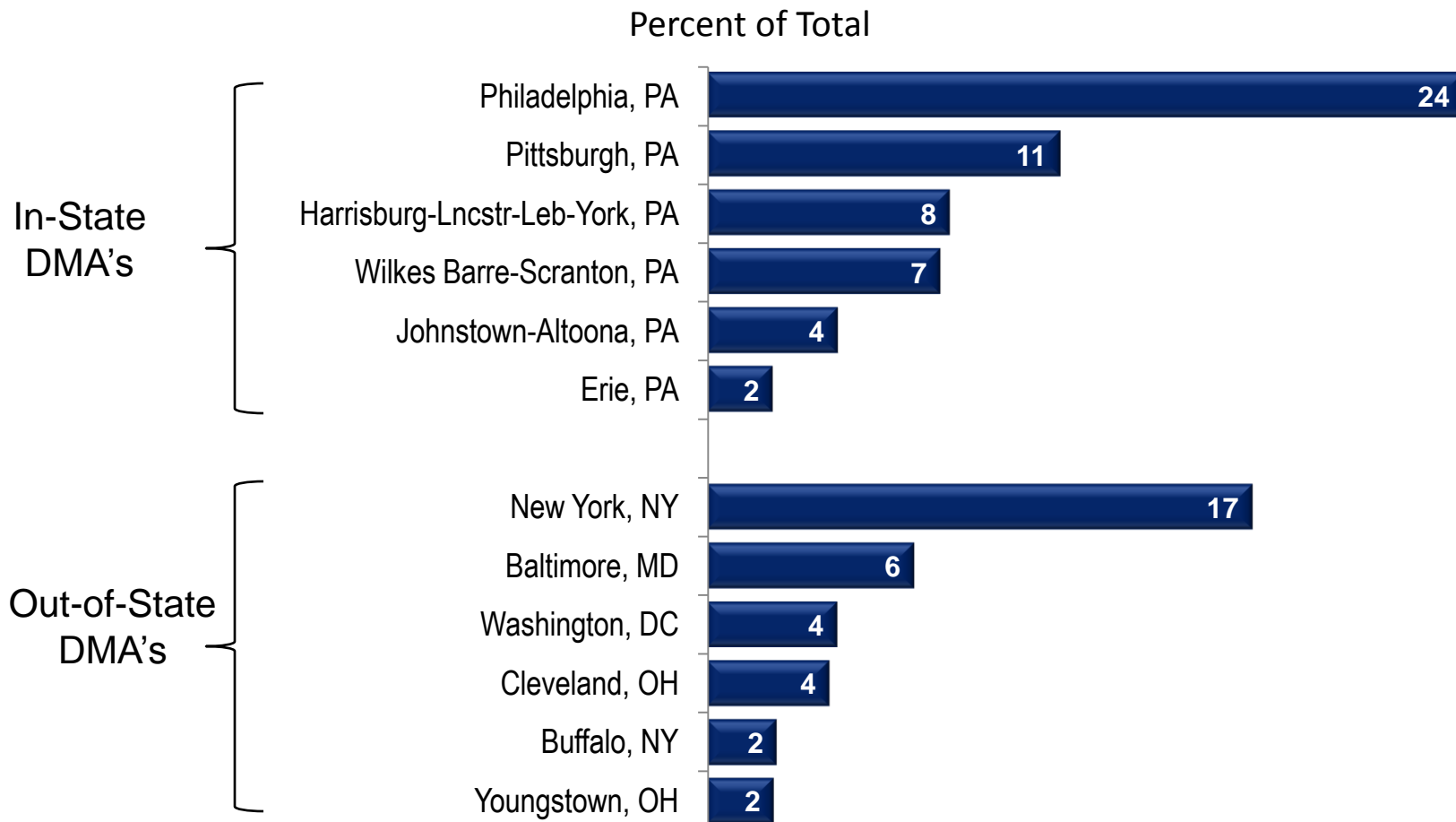
Base: Marketable Day-Trips



Urban Origin Markets – Marketable Day-Trips



Base: Marketable Day-Trips

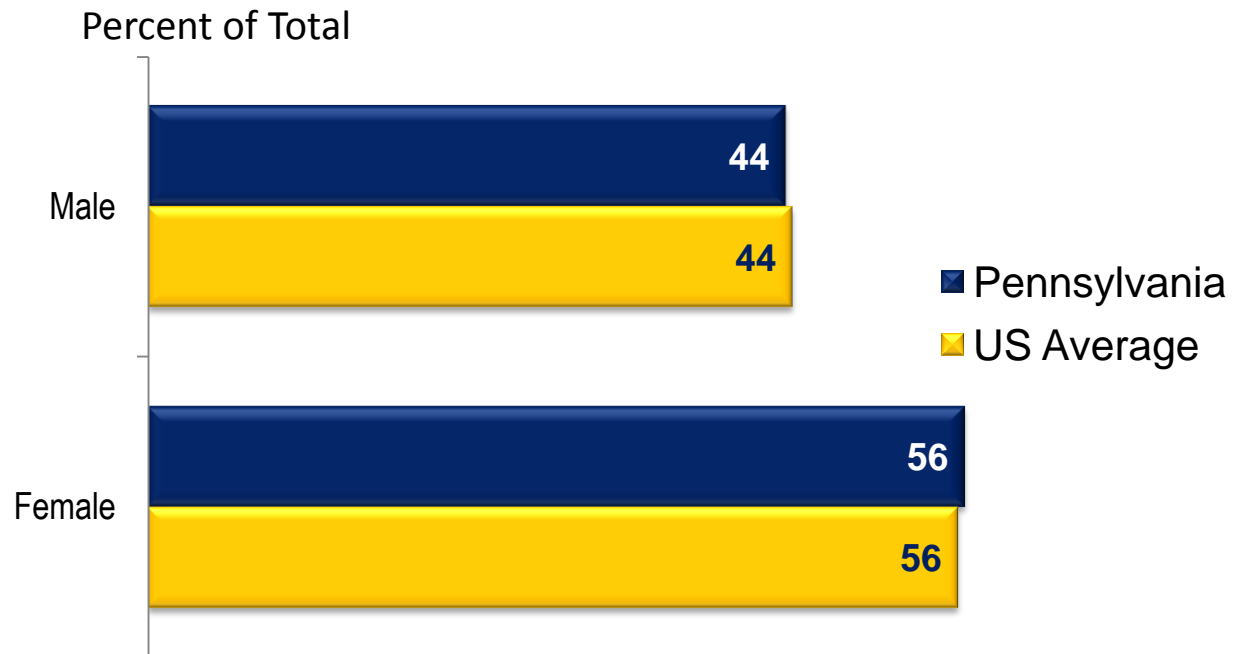


Traveler Profile — Marketable Day-Trips

Gender



Base: Marketable Day-Trips

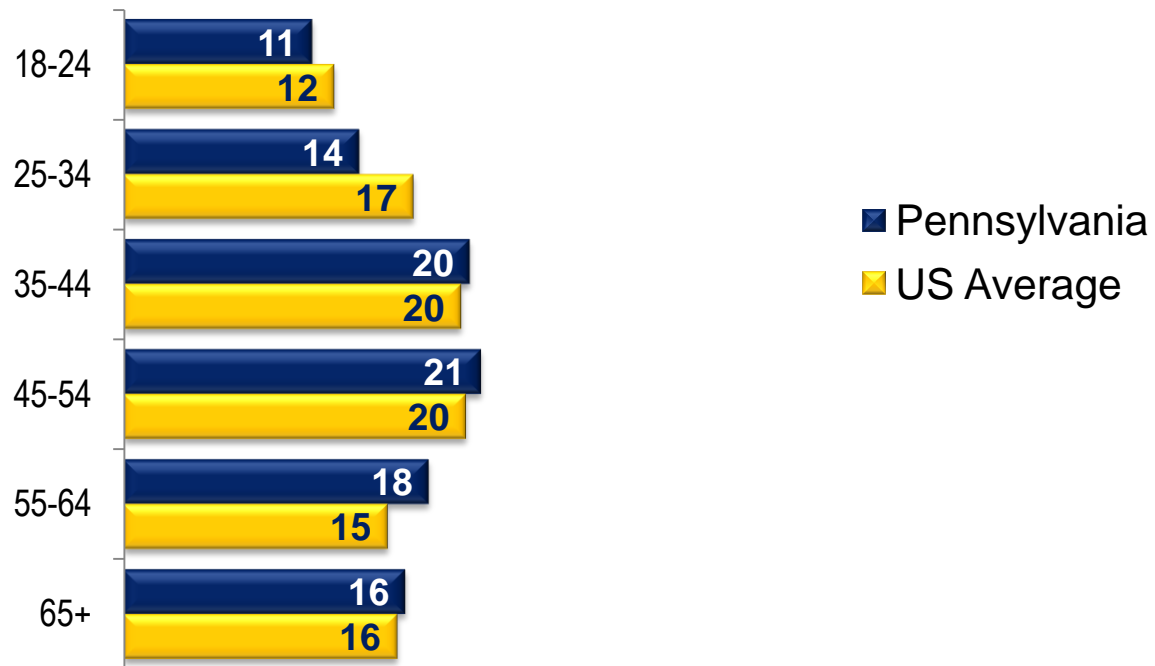


Age



Base: Marketable Day-Trips

Percent of Total



Pennsylvania

US Average

Average Age

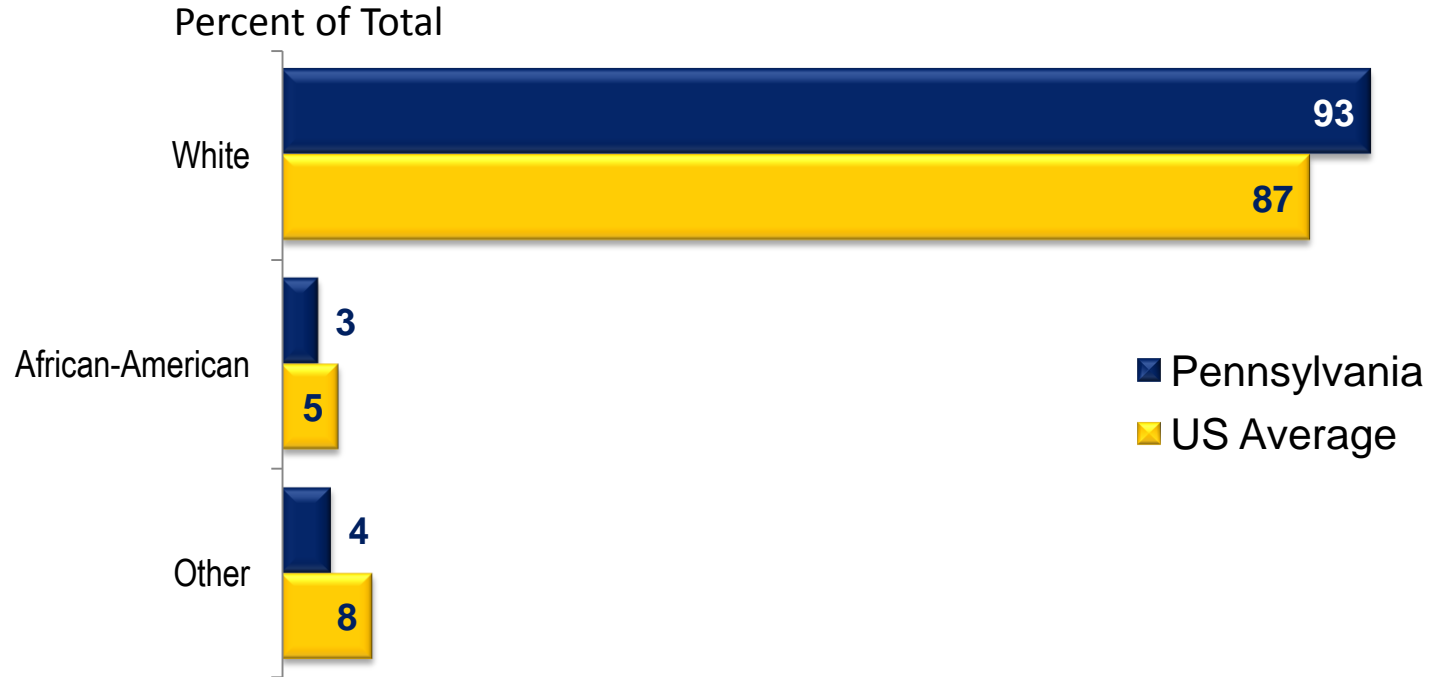
47.1

45.8

Race



Base: Marketable Day-Trips



Hispanic Background



Base: Marketable Day-Trips

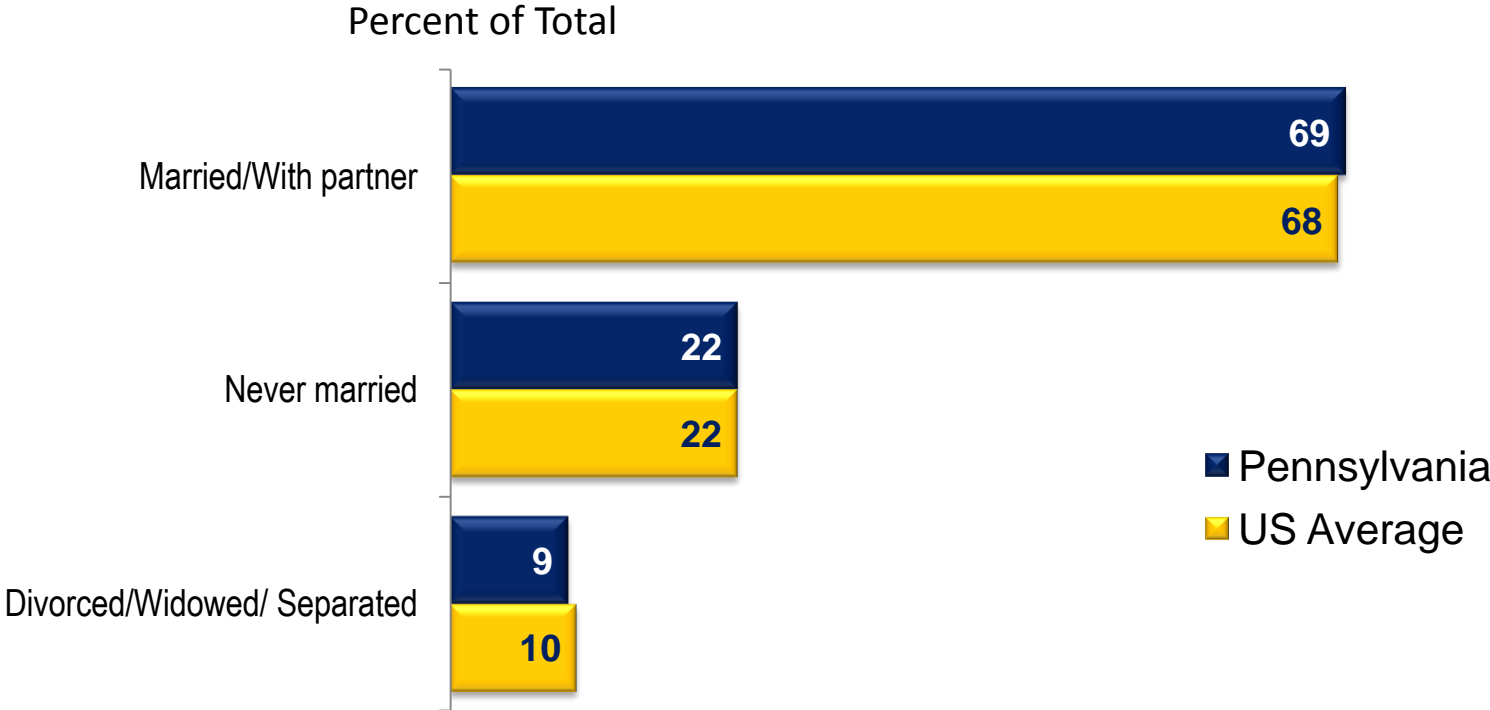
Percent of Total



Marital Status



Base: Marketable Day-Trips

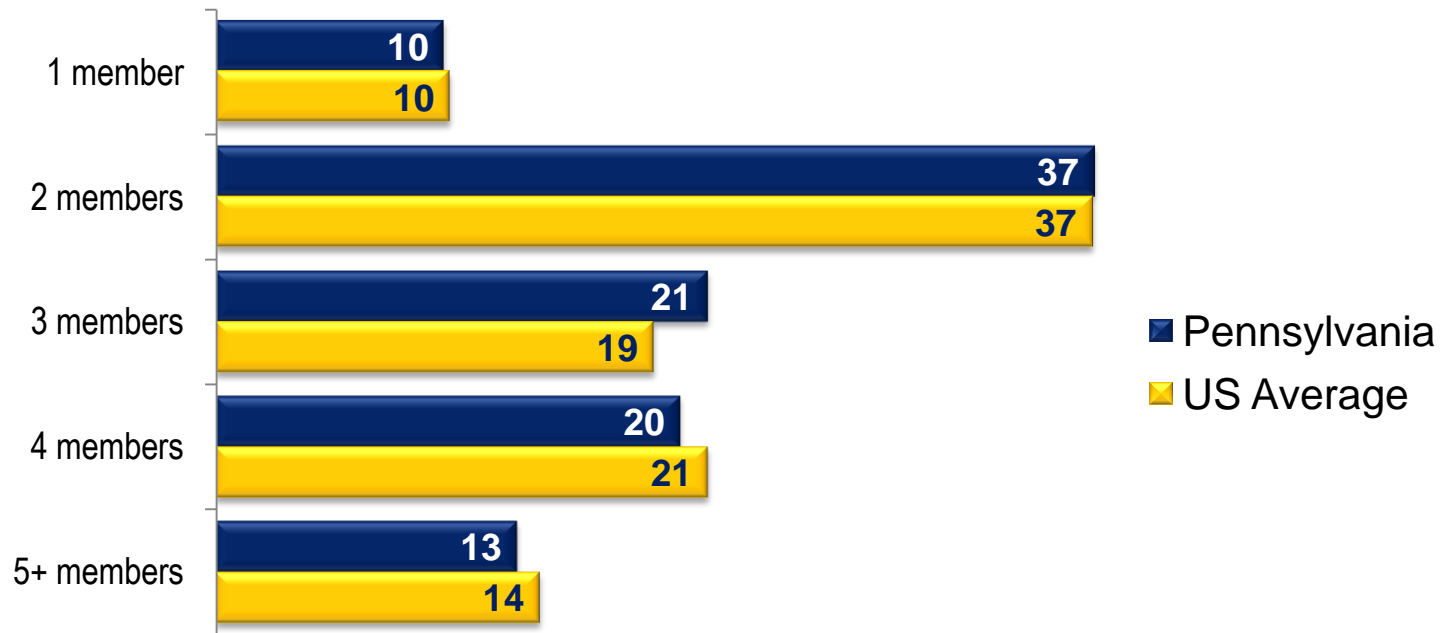


Household Size



Base: Marketable Day-Trips

Percent of Total



Average Household Size:

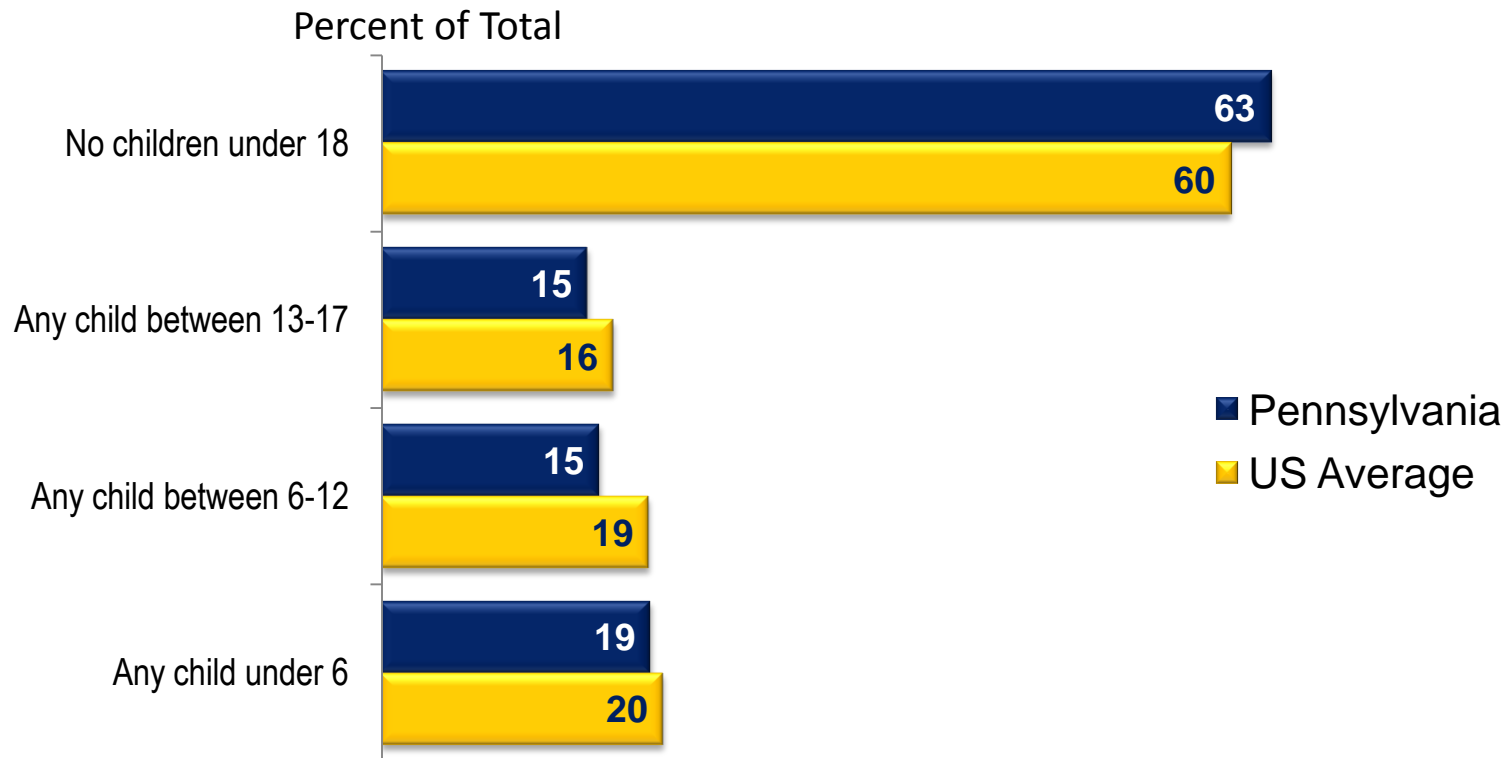
Pennsylvania
3.0

United States
3.0

Children in Household



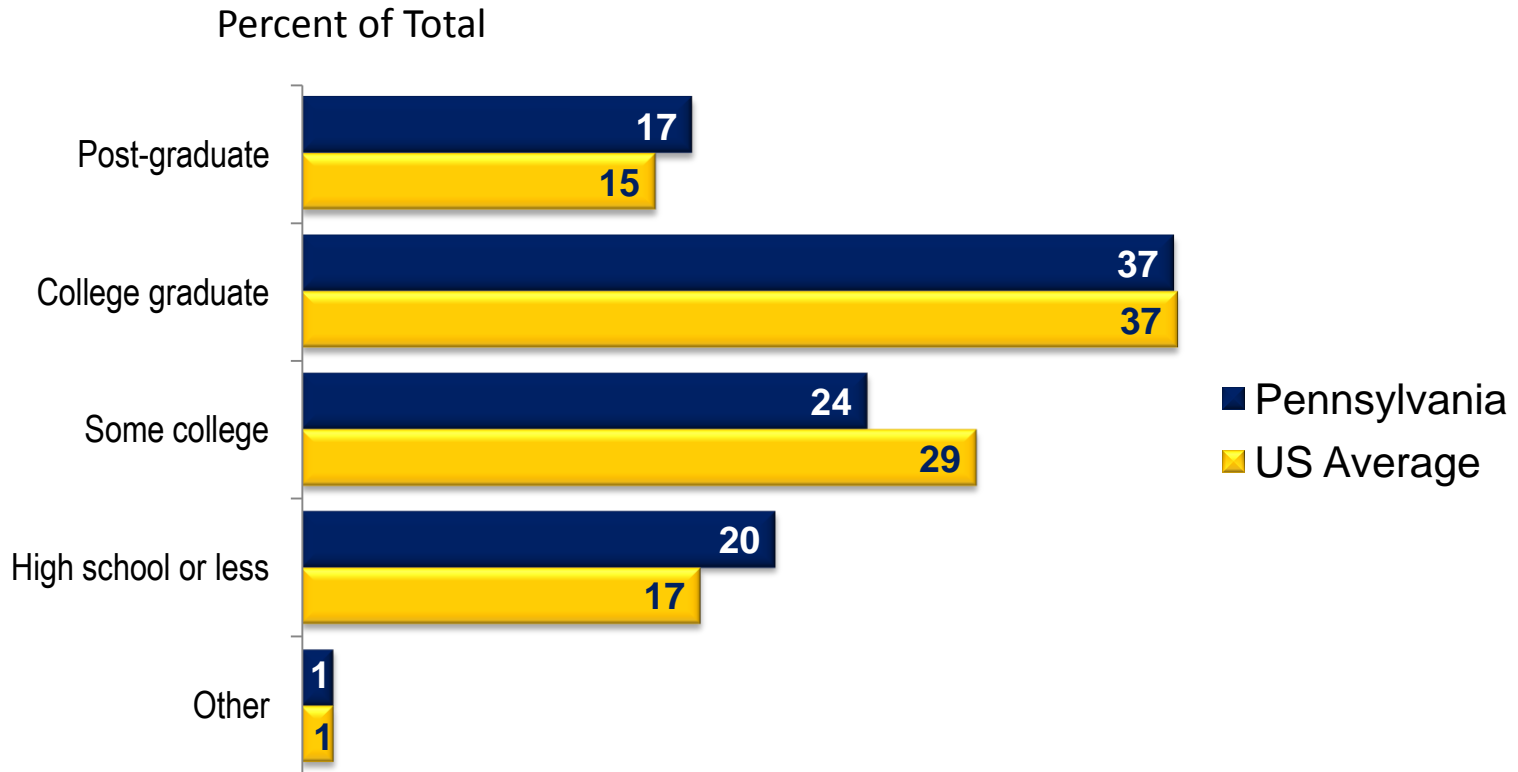
Base: Marketable Day-Trips



Education



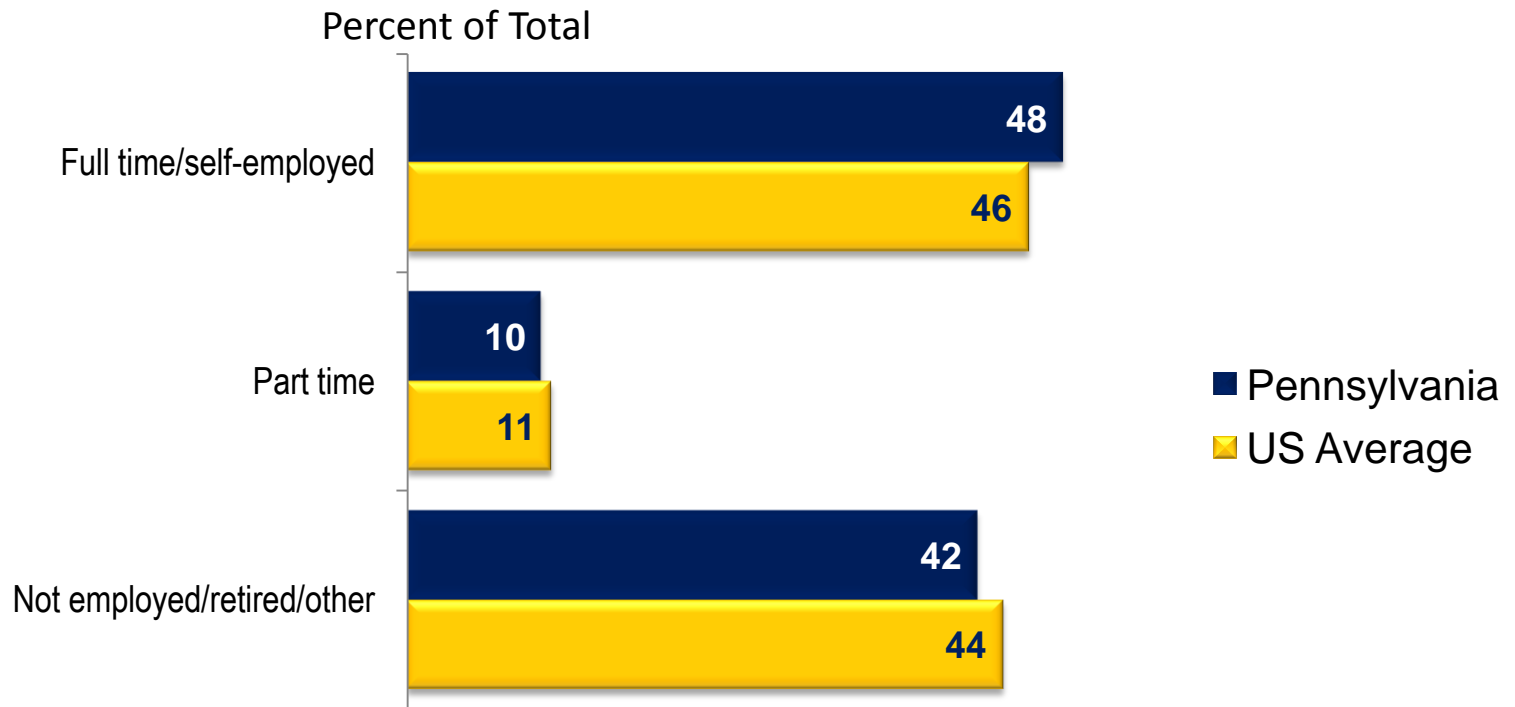
Base: Marketable Day-Trips



Employment



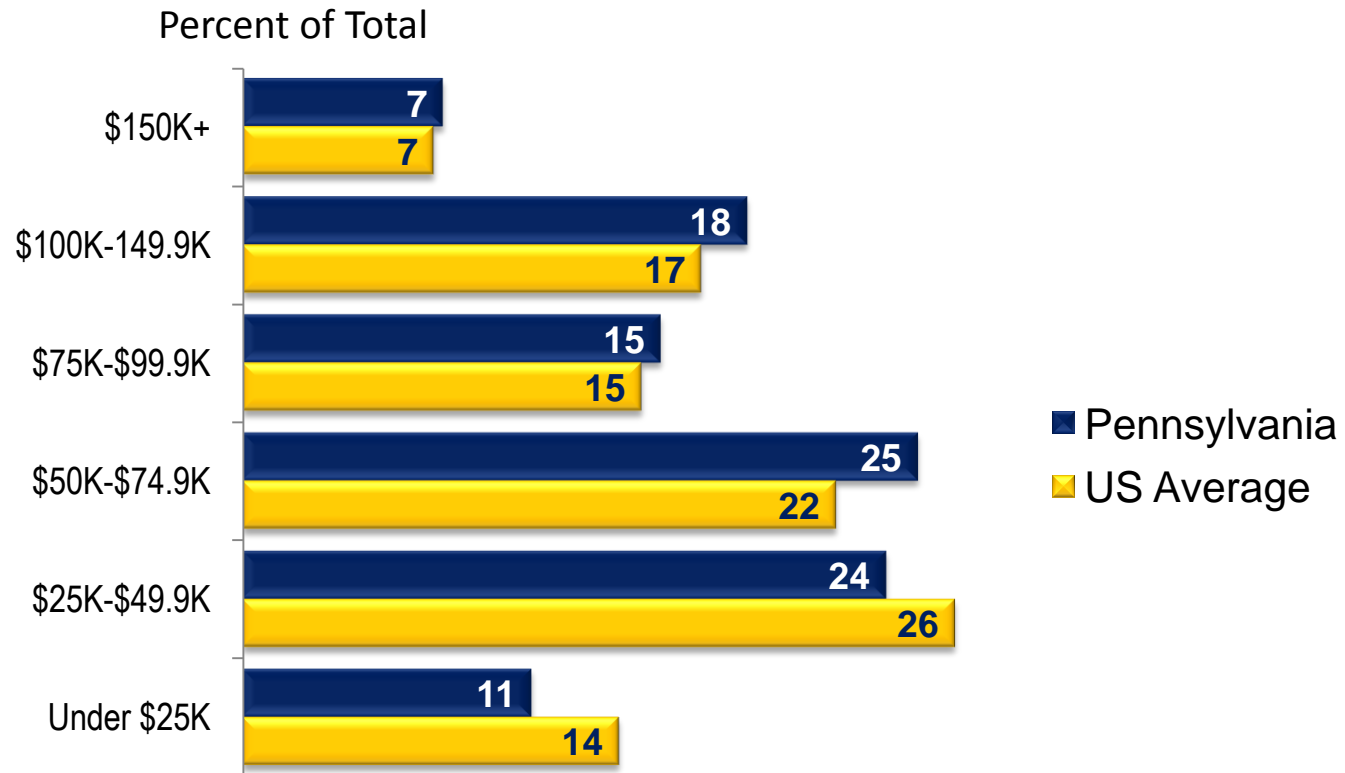
Base: Marketable Day-Trips



Income



Base: Marketable Day-Trips

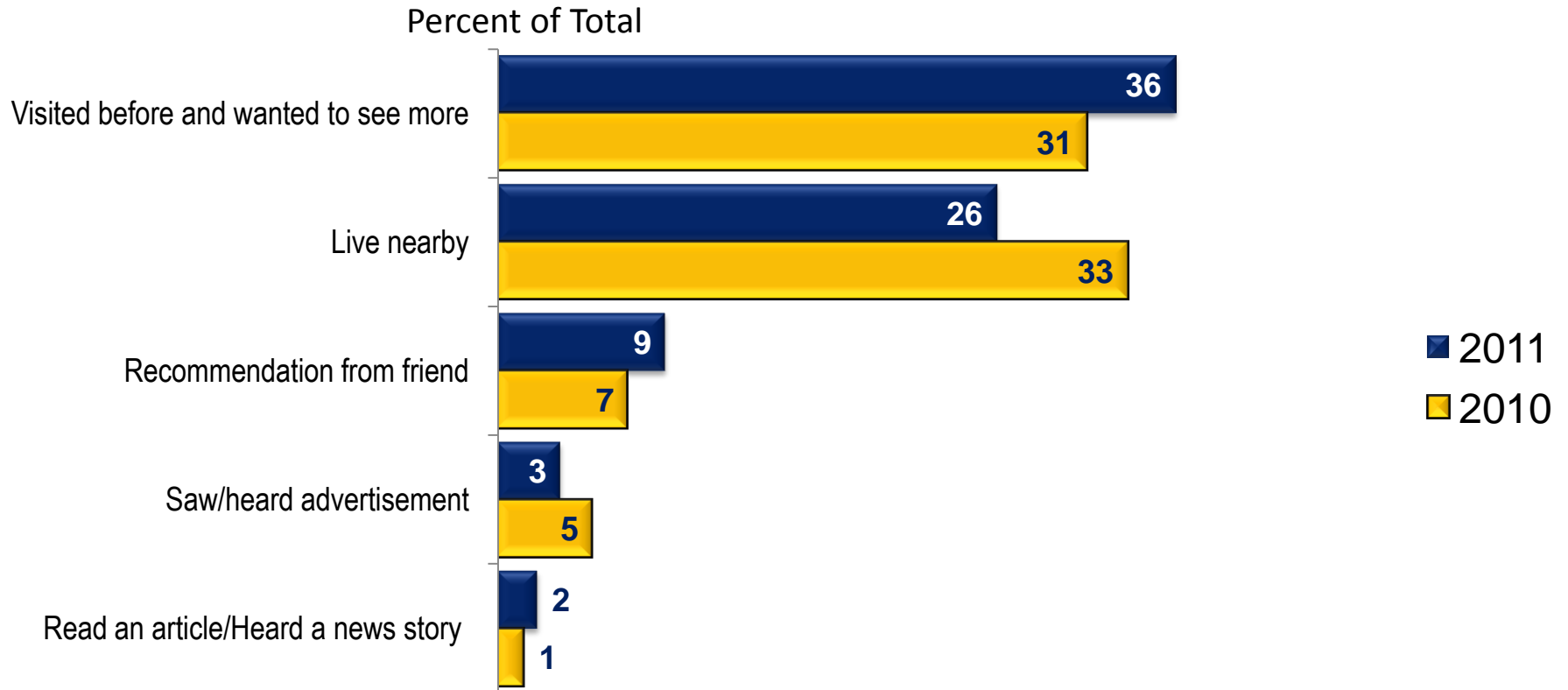


Trip Planning & Booking — Marketable Day-Trips

Main Reason for Choosing Pennsylvania



Base: Marketable Day-Trips

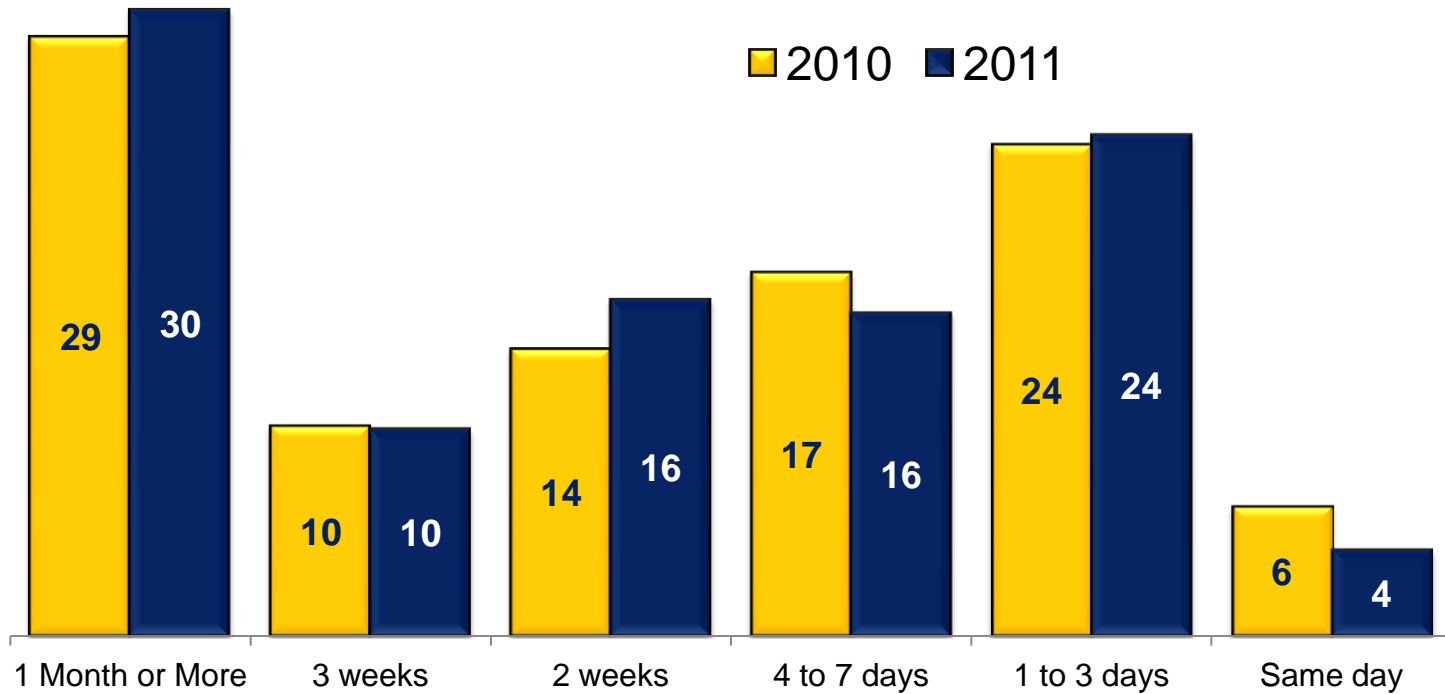


Planning Cycle



Base: Marketable Day-Trips

Percent of Total

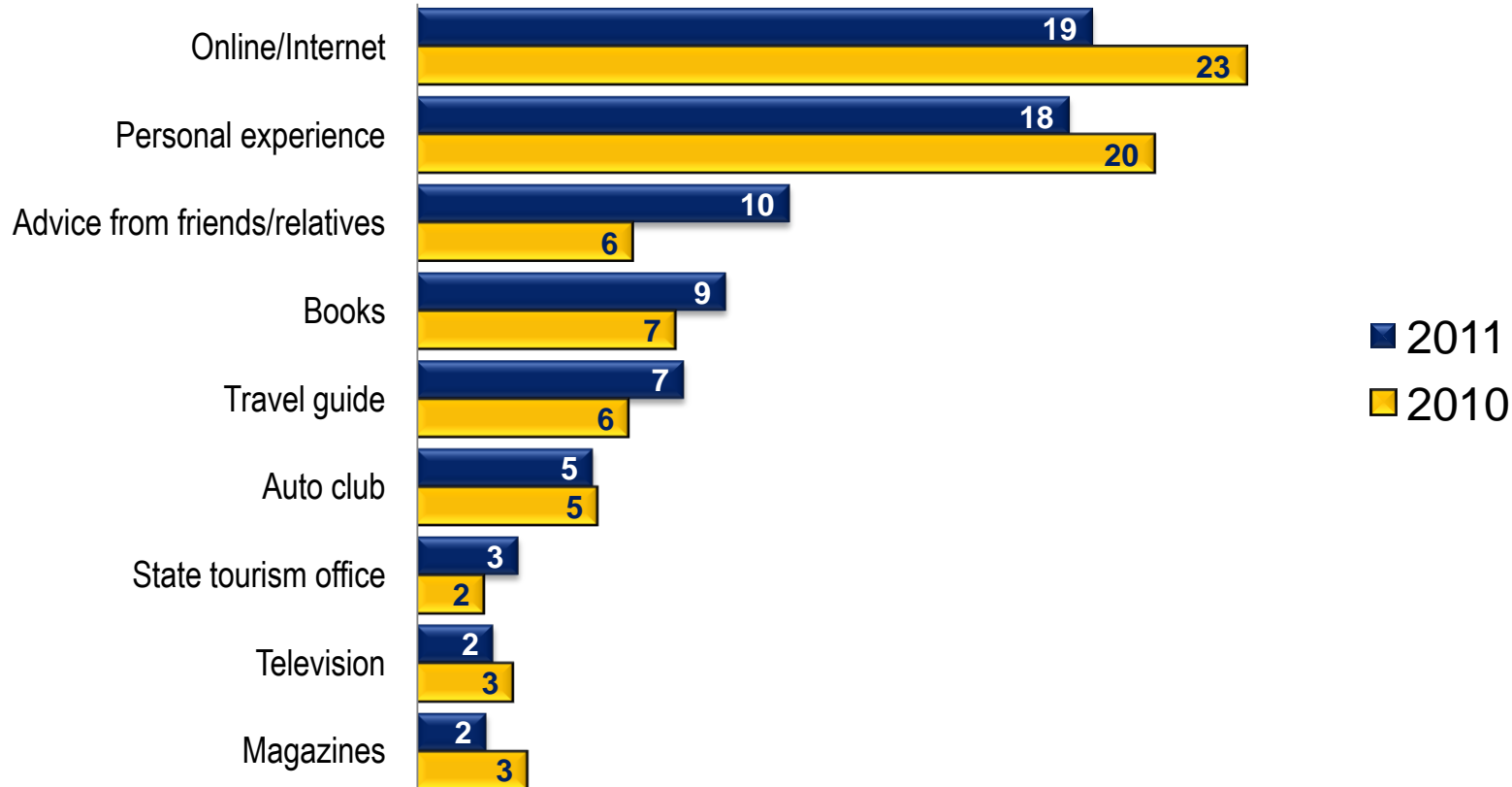


Information Sources Used for Planning



Base: Marketable Day-Trips

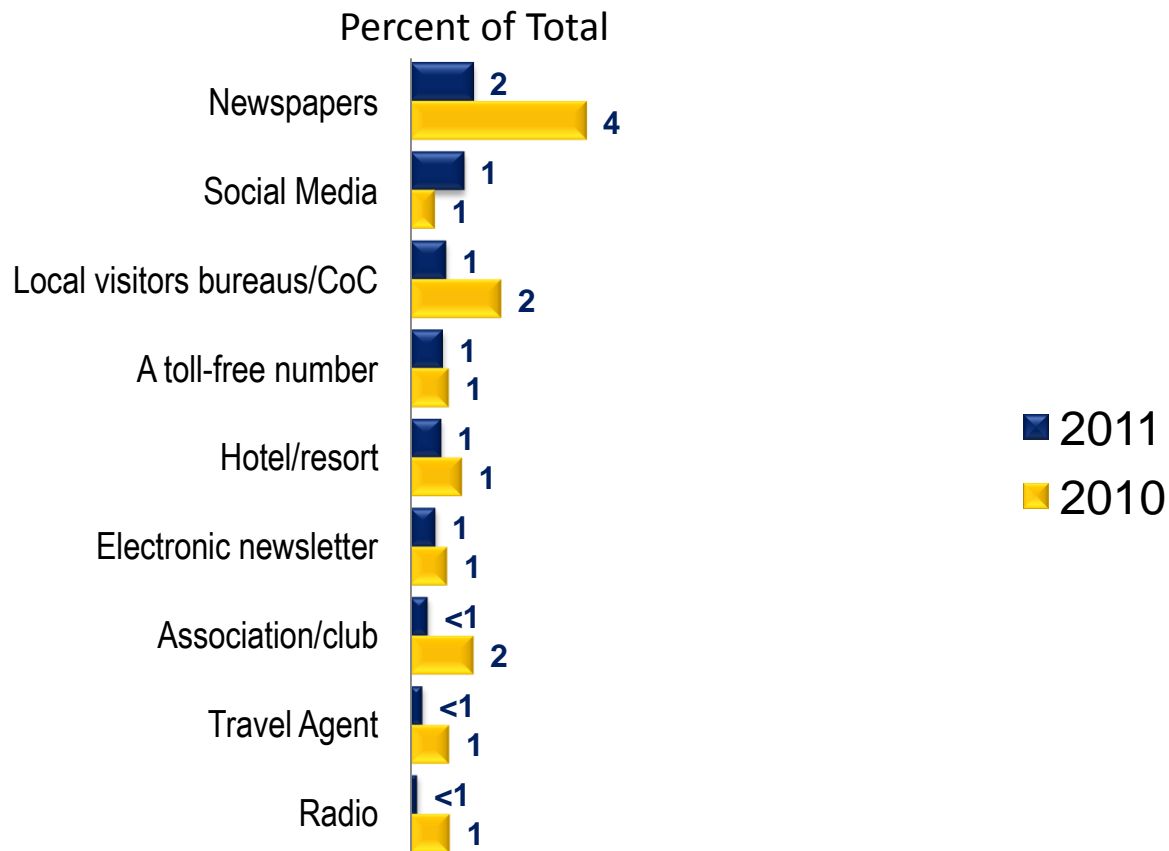
Percent of Total



Information Sources Used for Planning (cont'd)



Base: Marketable Day-Trips

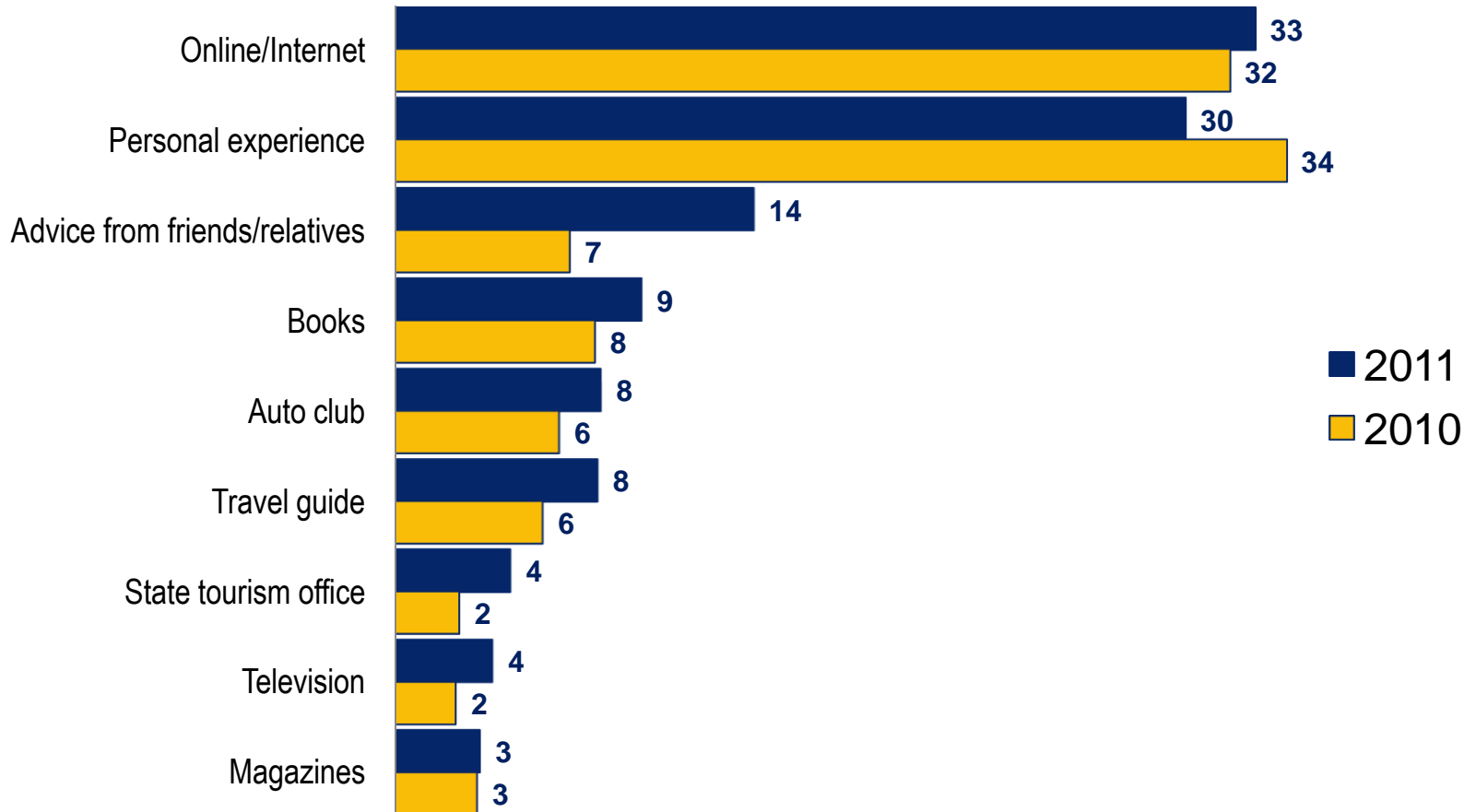


Information Sources Considered Useful for Planning Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total

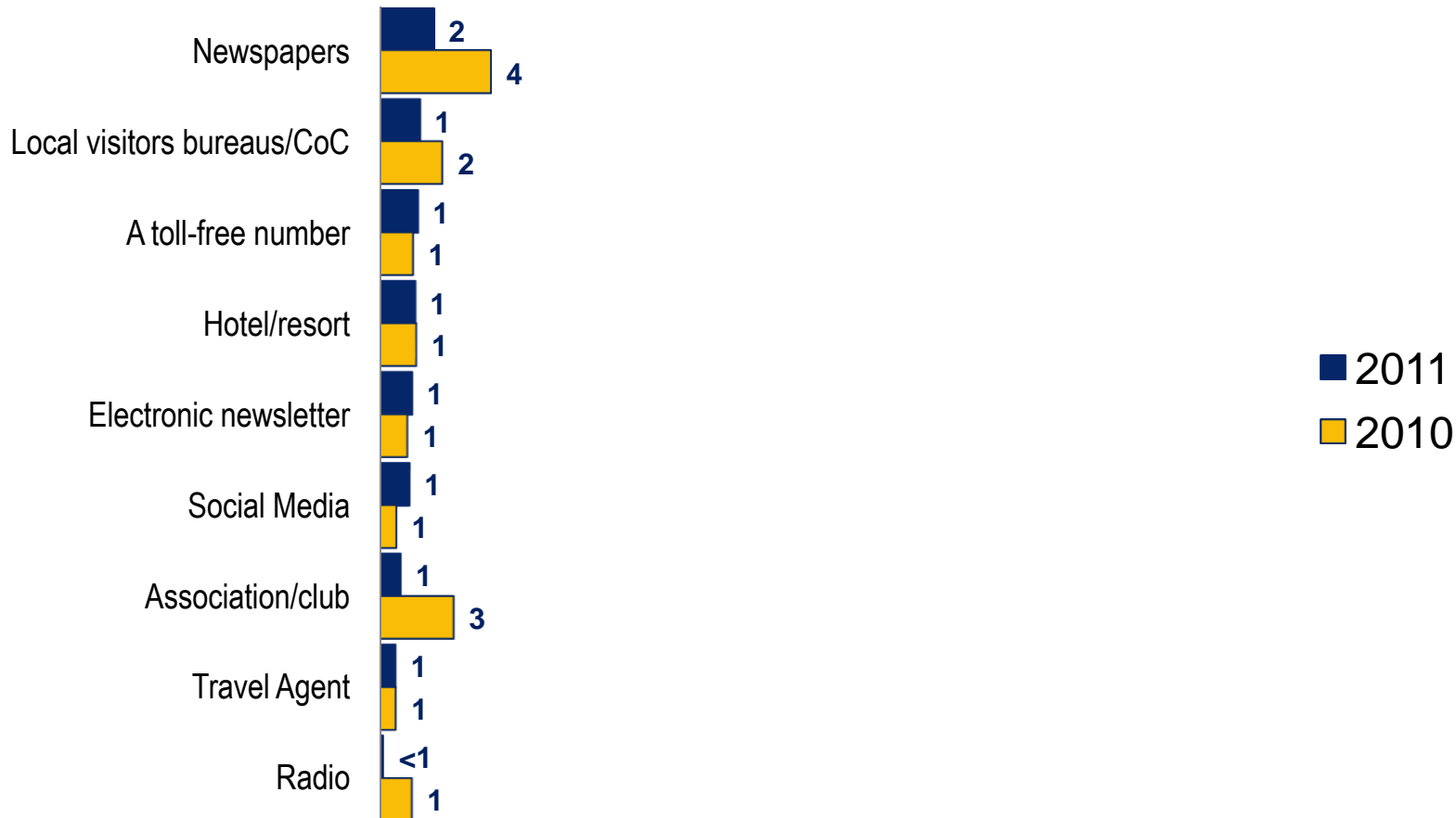


Information Sources Considered Useful for Planning Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

Percent of Total

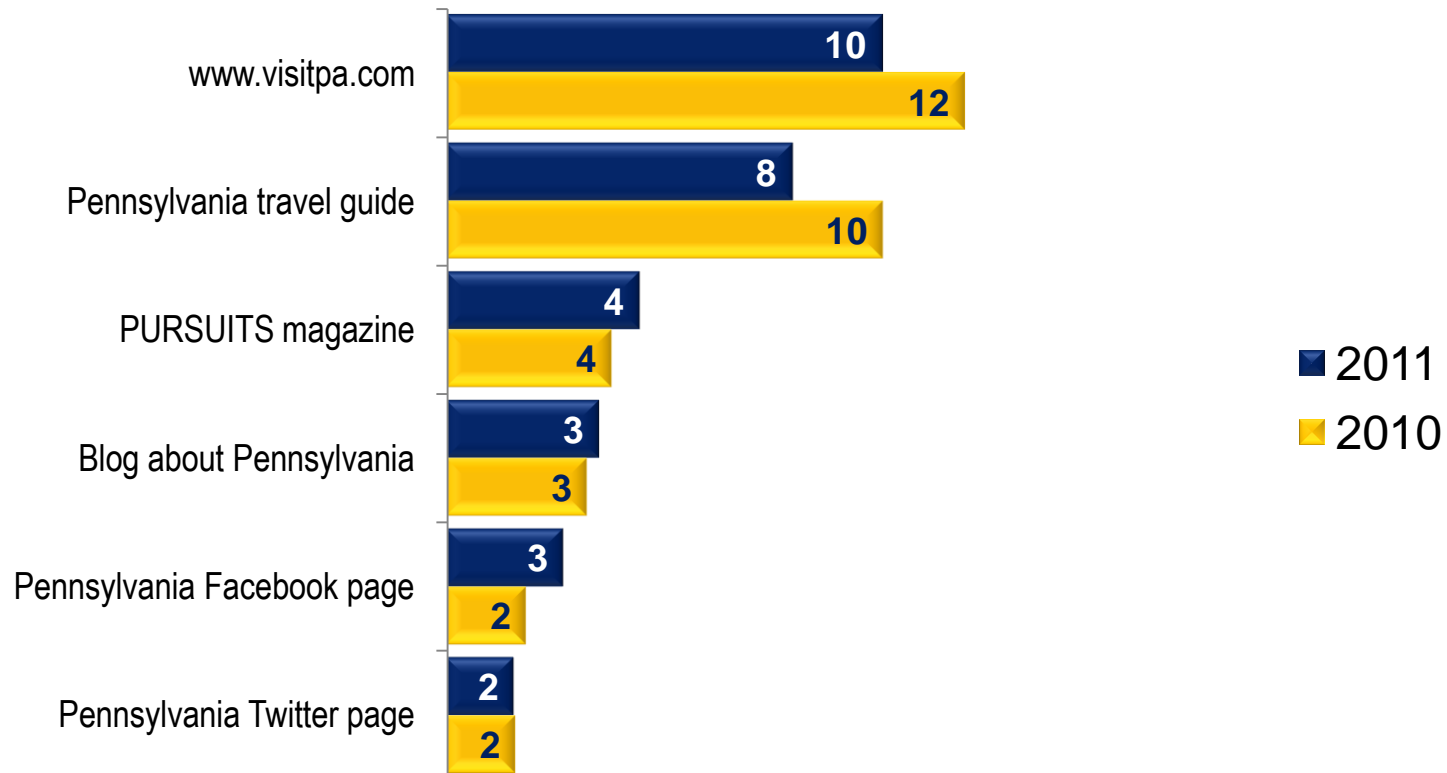


Use of Pennsylvania Trip Planning Tools



Base: Marketable Day-Trips

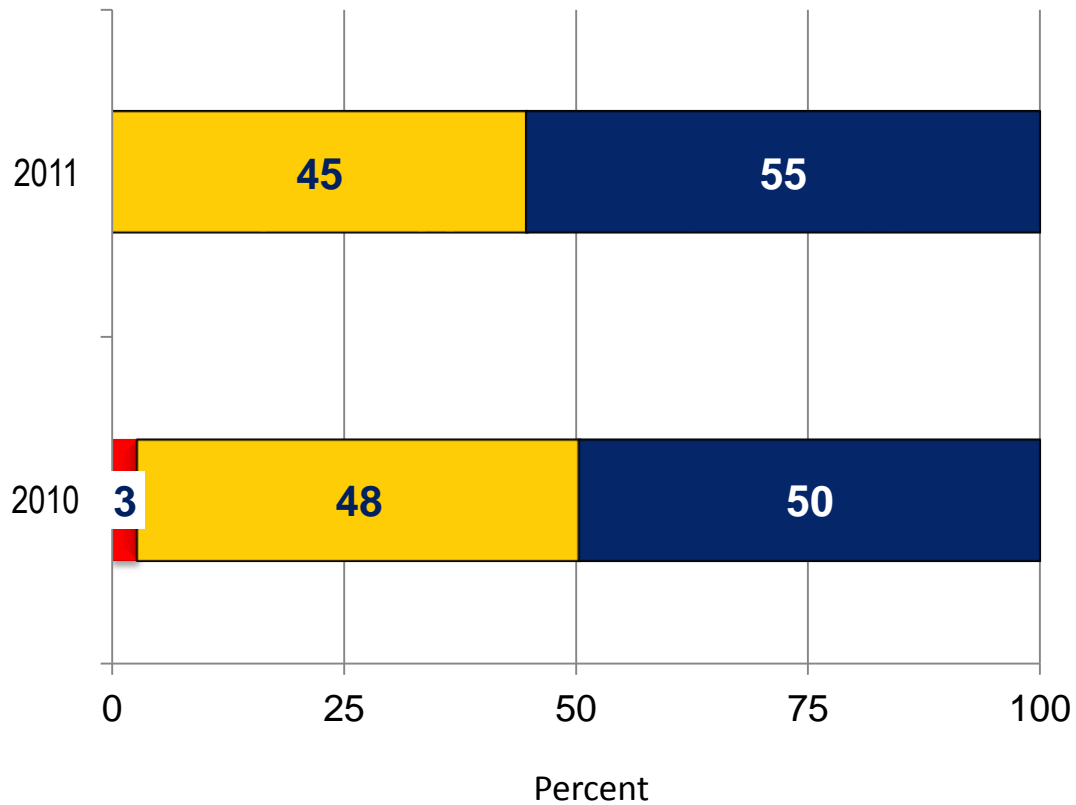
Percent of Total



www.visitpa.com Usefulness



Base: Marketable Day-Trips



■ Not Very Useful

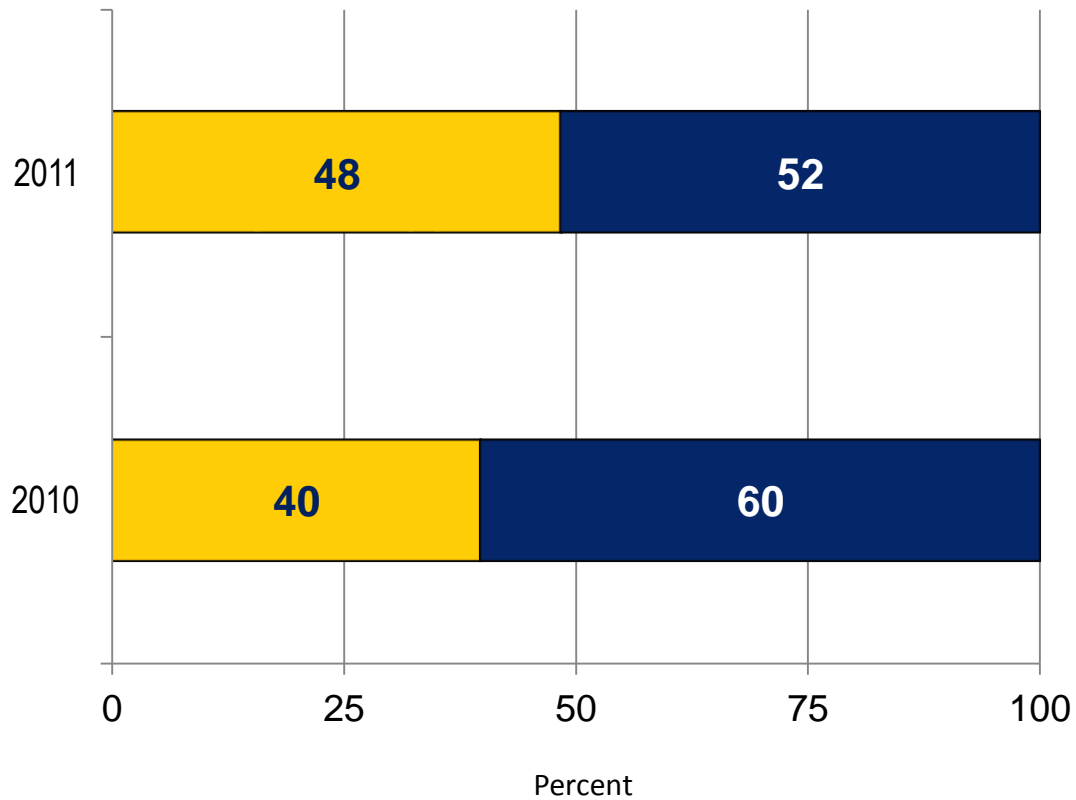
■ Somewhat Useful

■ Very Useful

Travel Guide Usefulness



Base: Marketable Day-Trips



■ Not Very Useful

■ Somewhat Useful

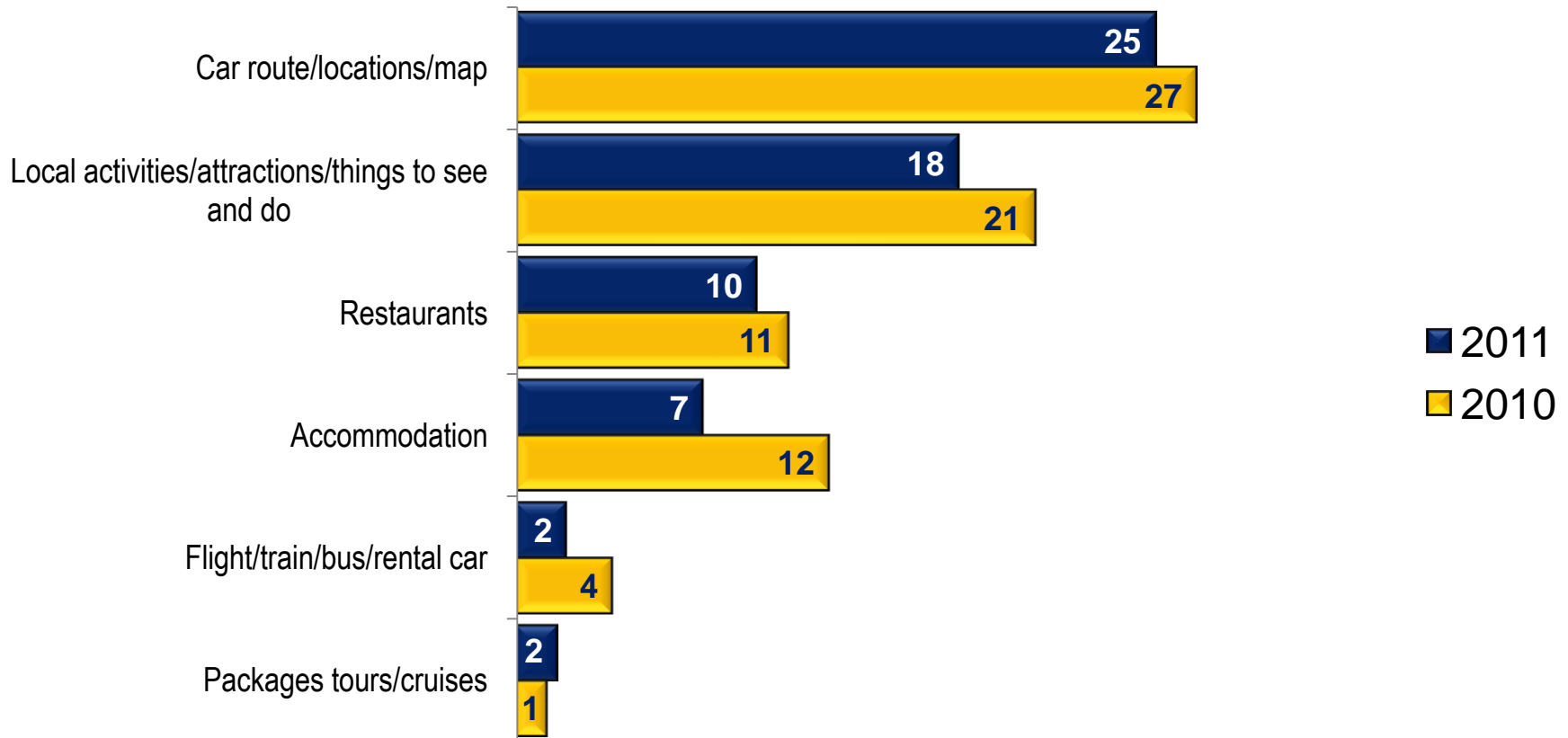
■ Very Useful

Trip Elements Planned Using Internet



Base: Marketable Day-Trips

Percent of Total

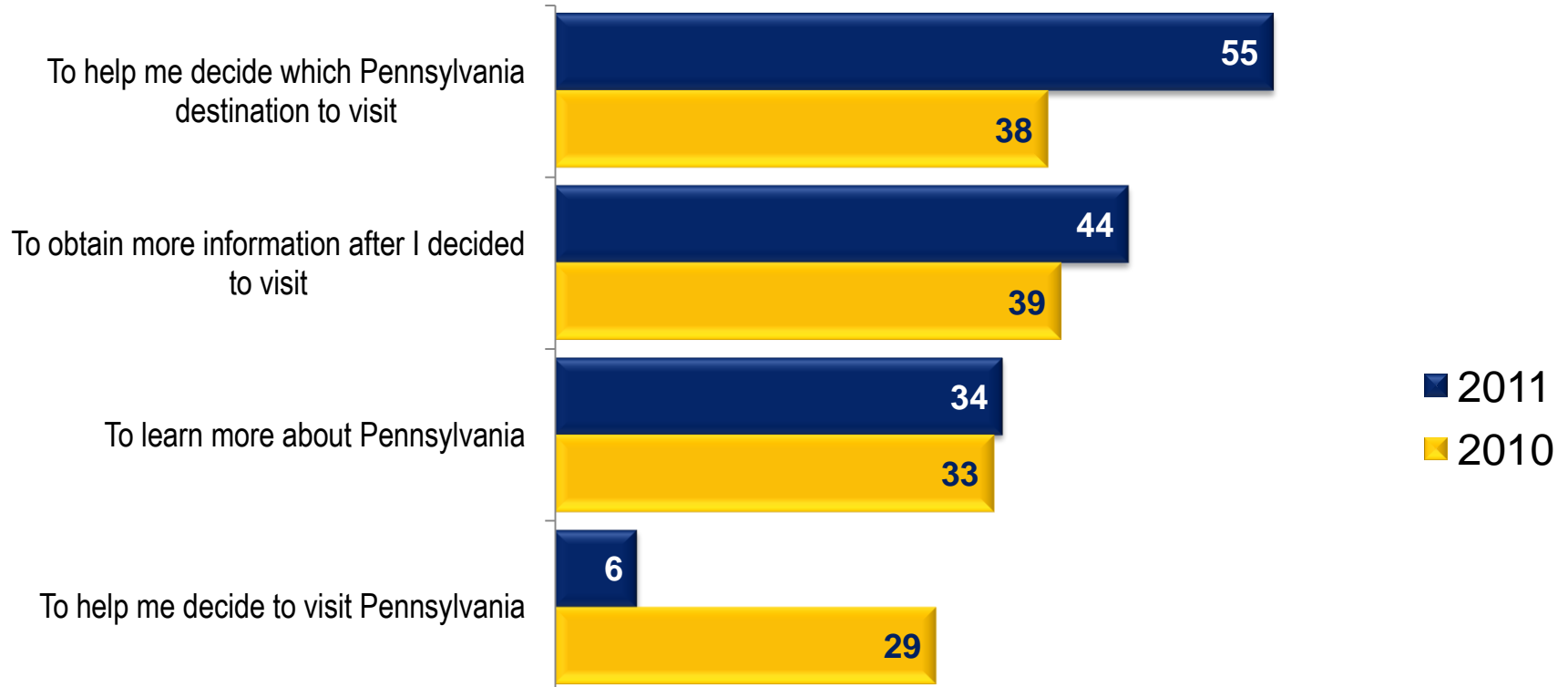


Reasons for Visiting www.visitpa.com



Base: Marketable Day-Trips

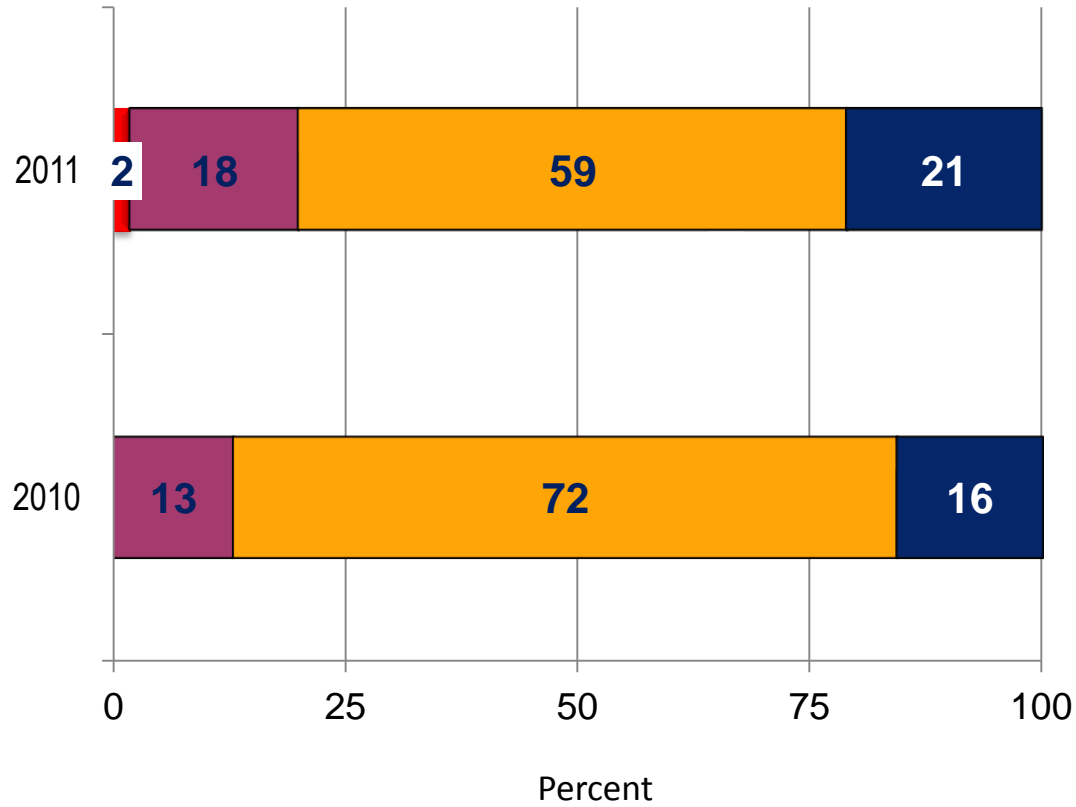
Percent of Total



www.visitpa.com Influence on Planning



Base: Marketable Day-Trips

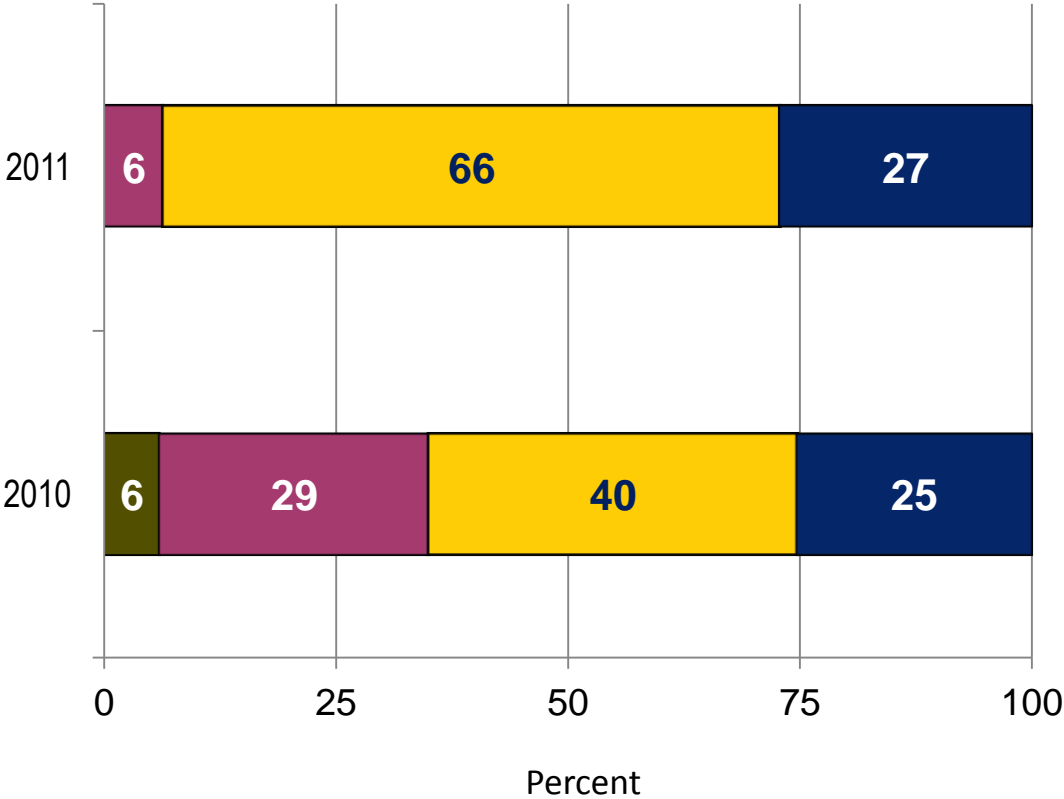


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

www.visitpa.com Influence on Visitation



Base: Marketable Day-Trips

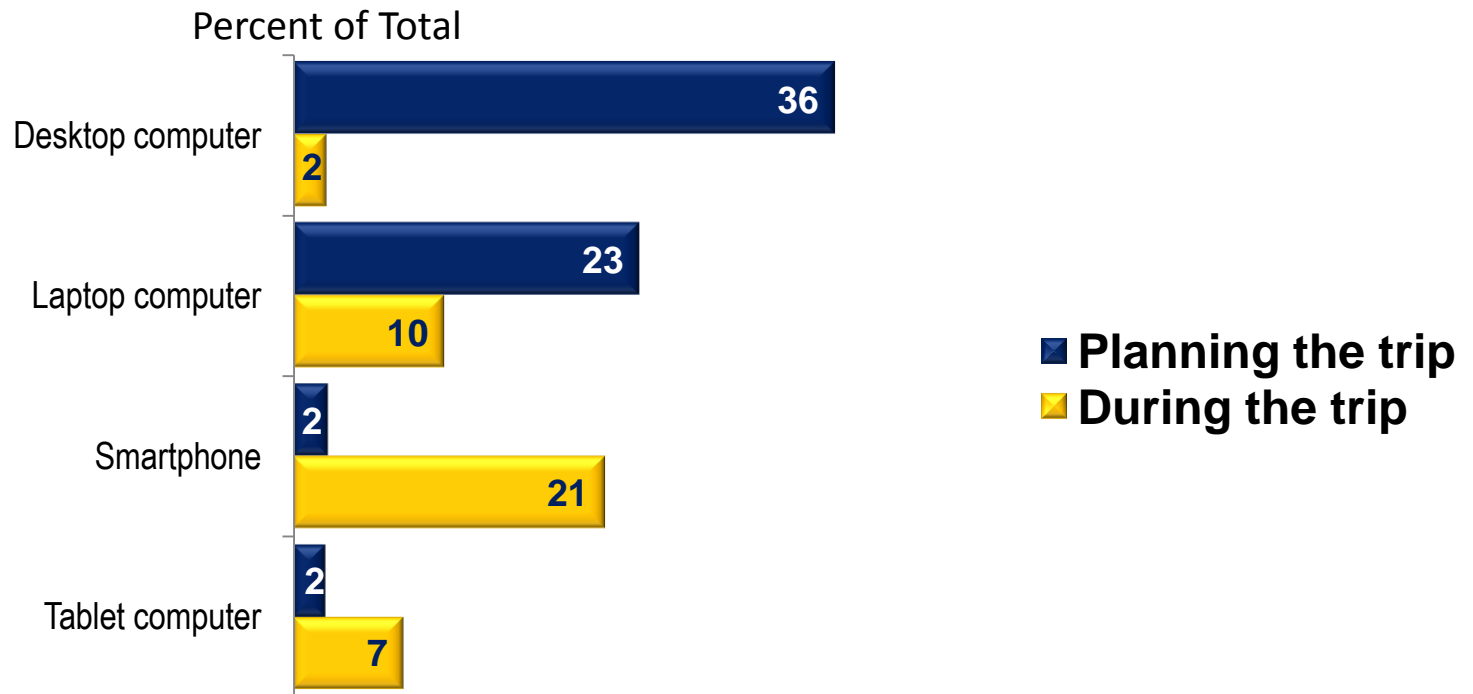


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

Technology Used by Travelers



Base: Marketable Day-Trips

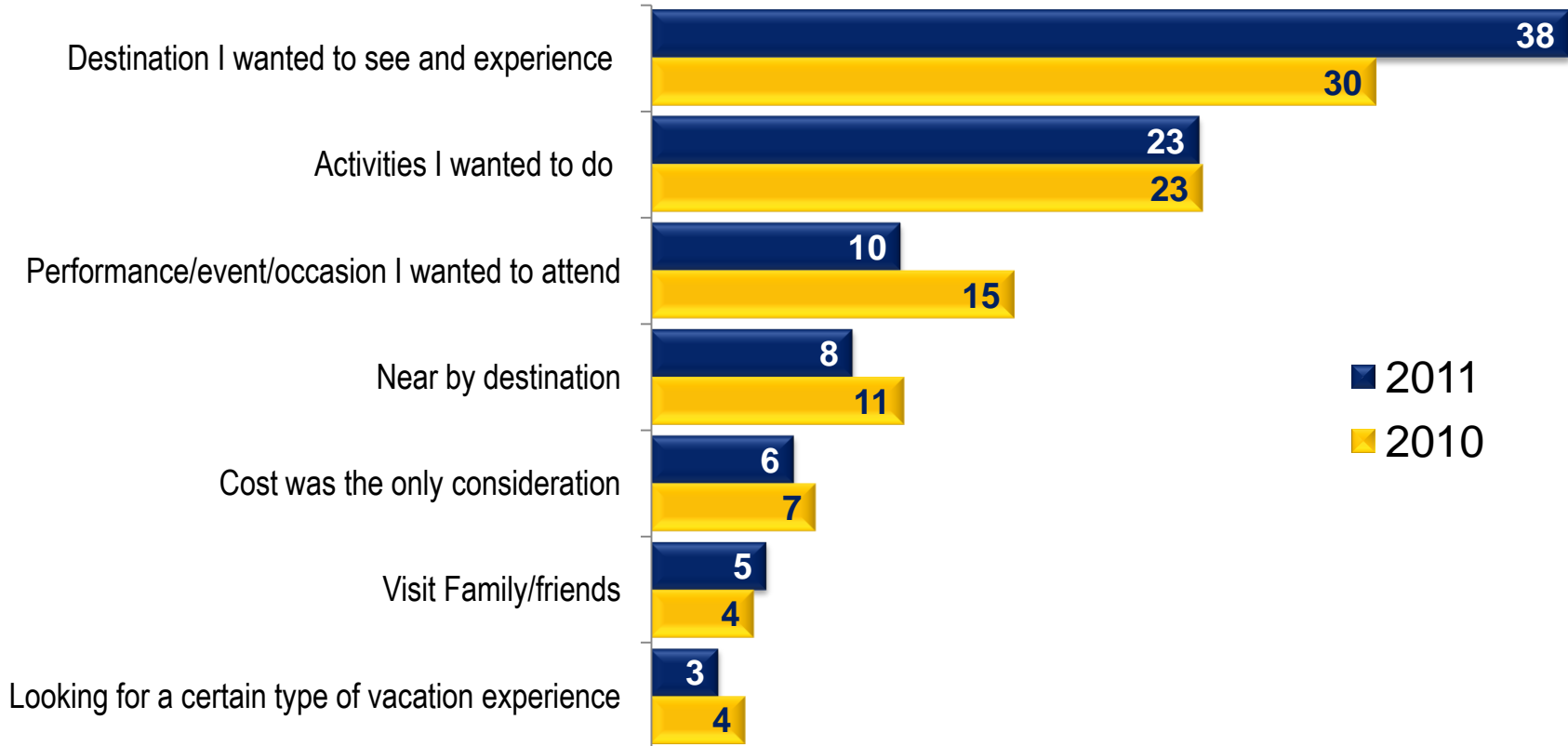


Planning Considerations Beyond Cost



Base: Marketable Day-Trips

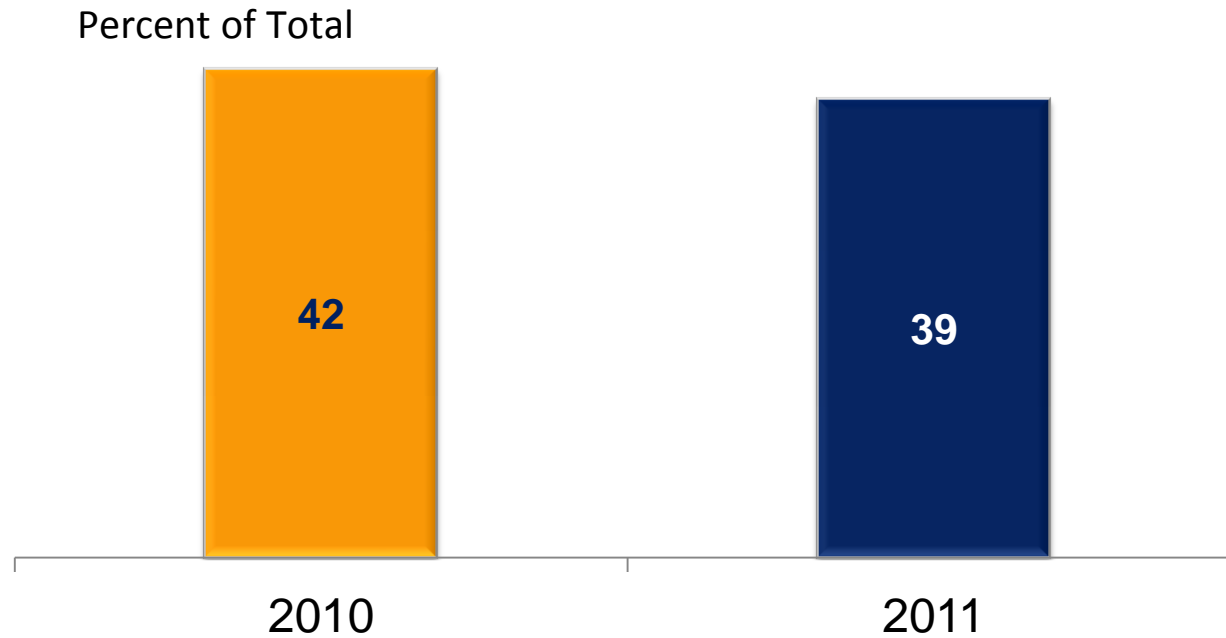
Percent of Total



Percent Who Booked In Advance



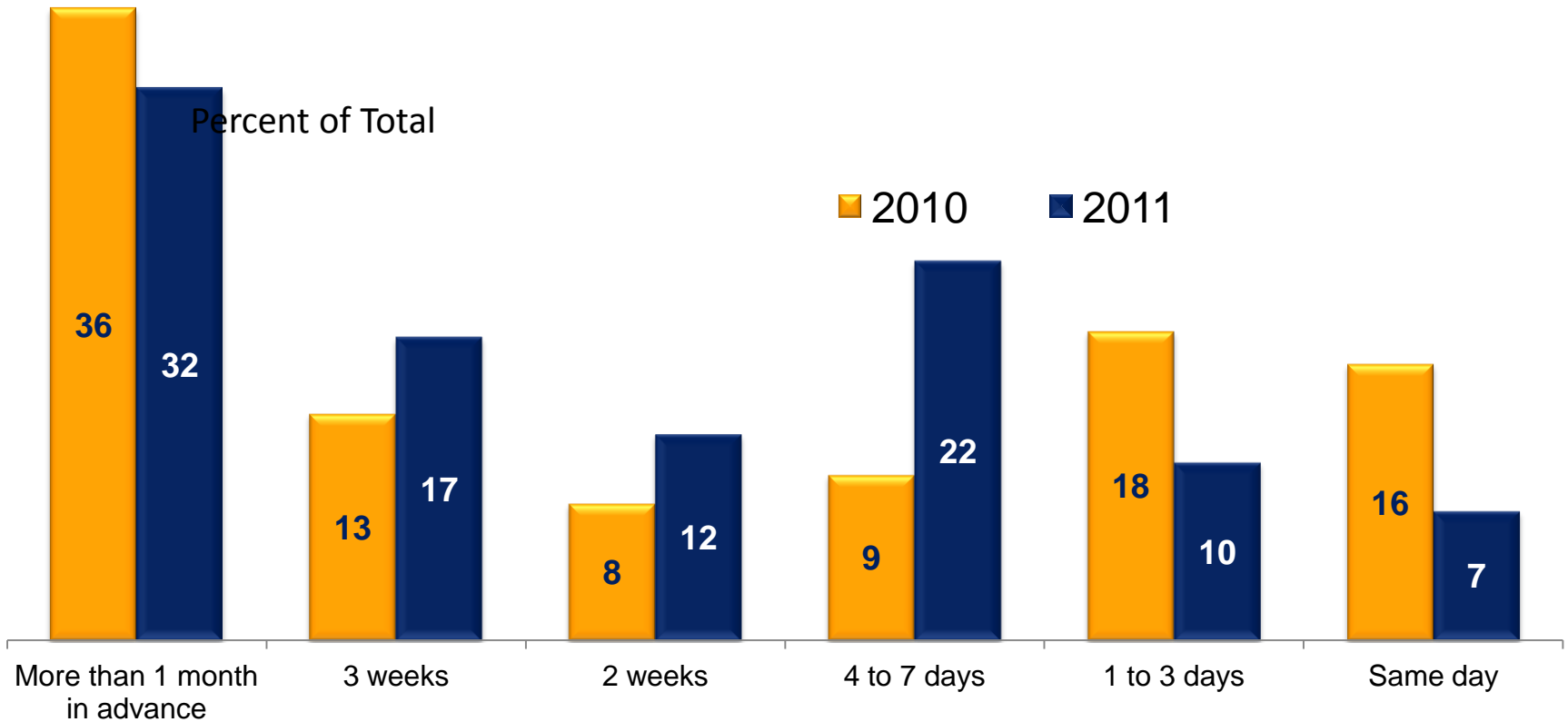
Base: Marketable Day-Trips



Booking Cycle



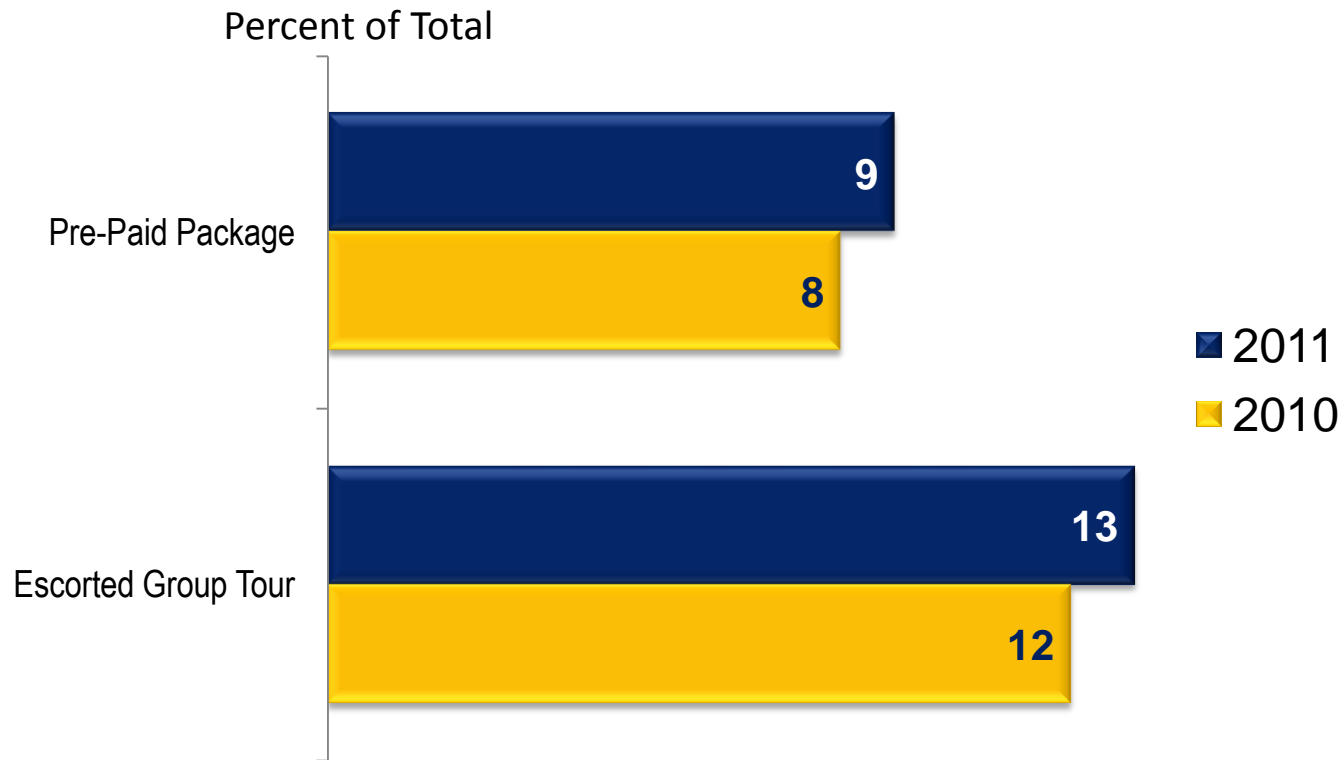
Base: Marketable Day-Trips Booked in Advance



Use of Vacation Packages and Group Travel



Base: Marketable Day-Trips

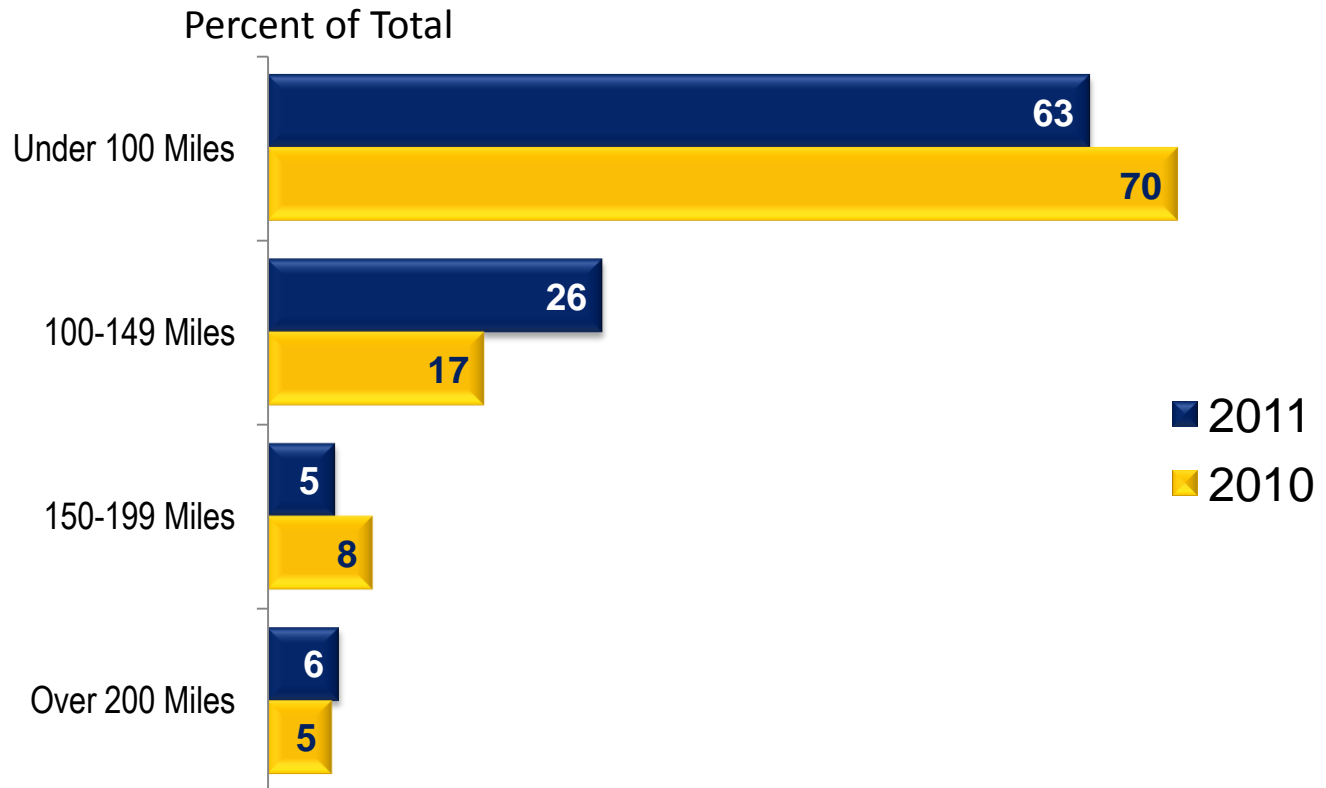


Marketable Day-Trip Characteristics

Distance Traveled for Pennsylvania Day-Trip



Base: Marketable Day-Trips

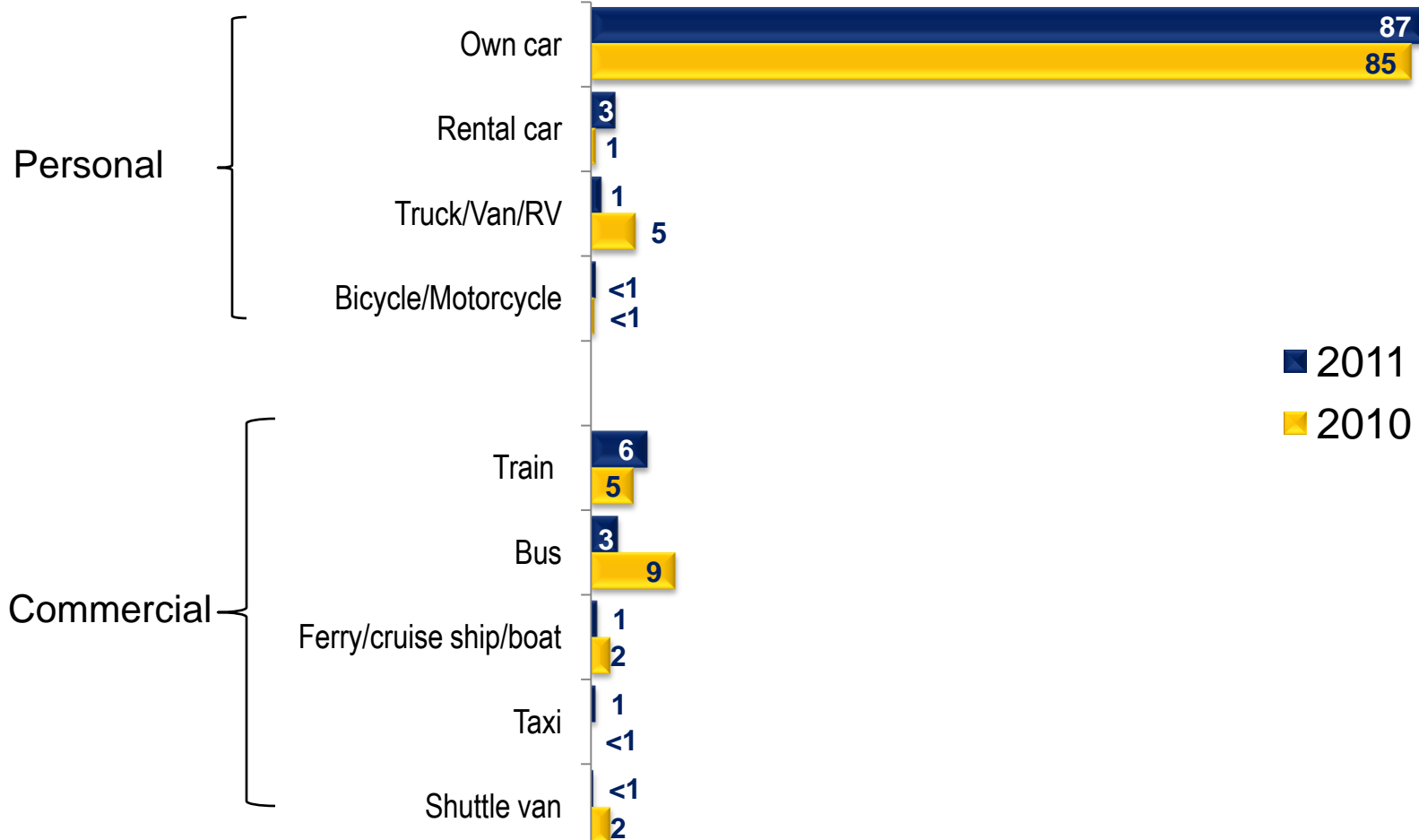


Transportation Used to Enter Pennsylvania



Base: Marketable Day-Trips

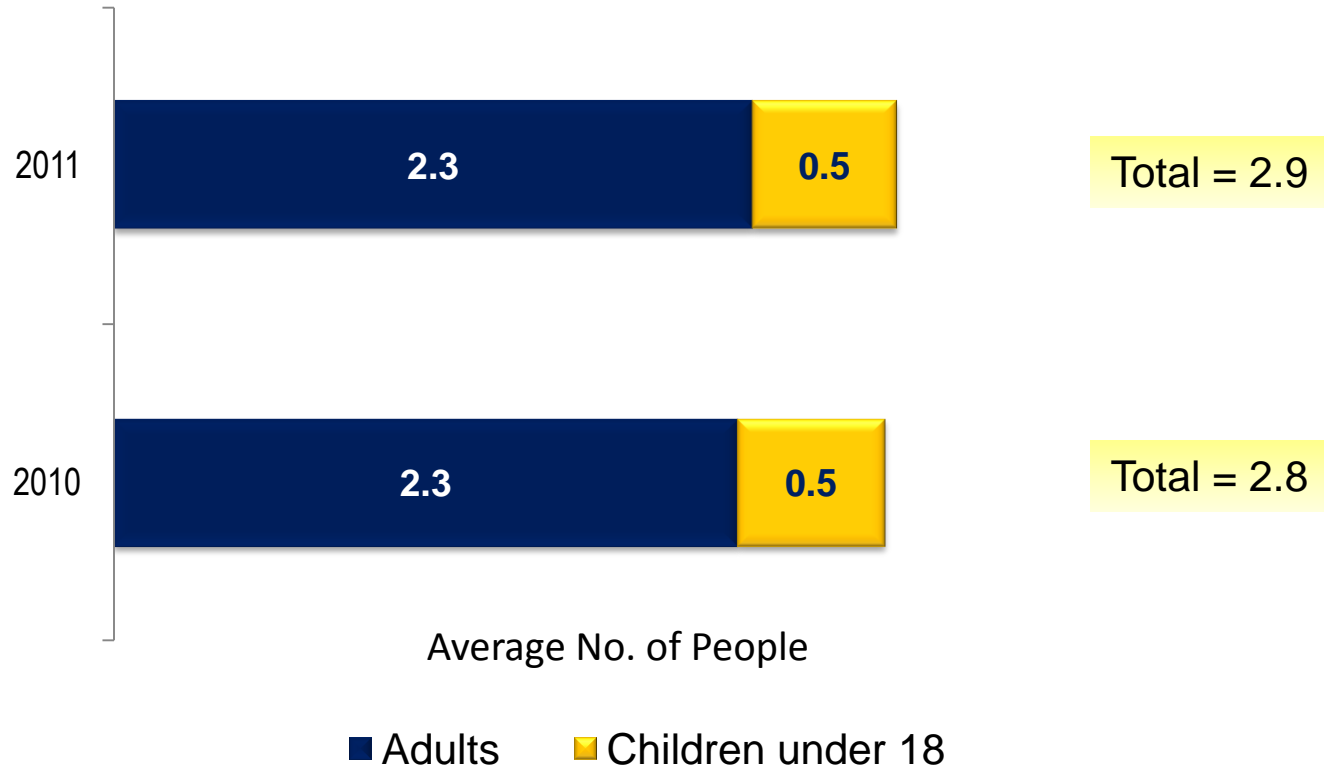
Percent of Total



Size of Travel Party



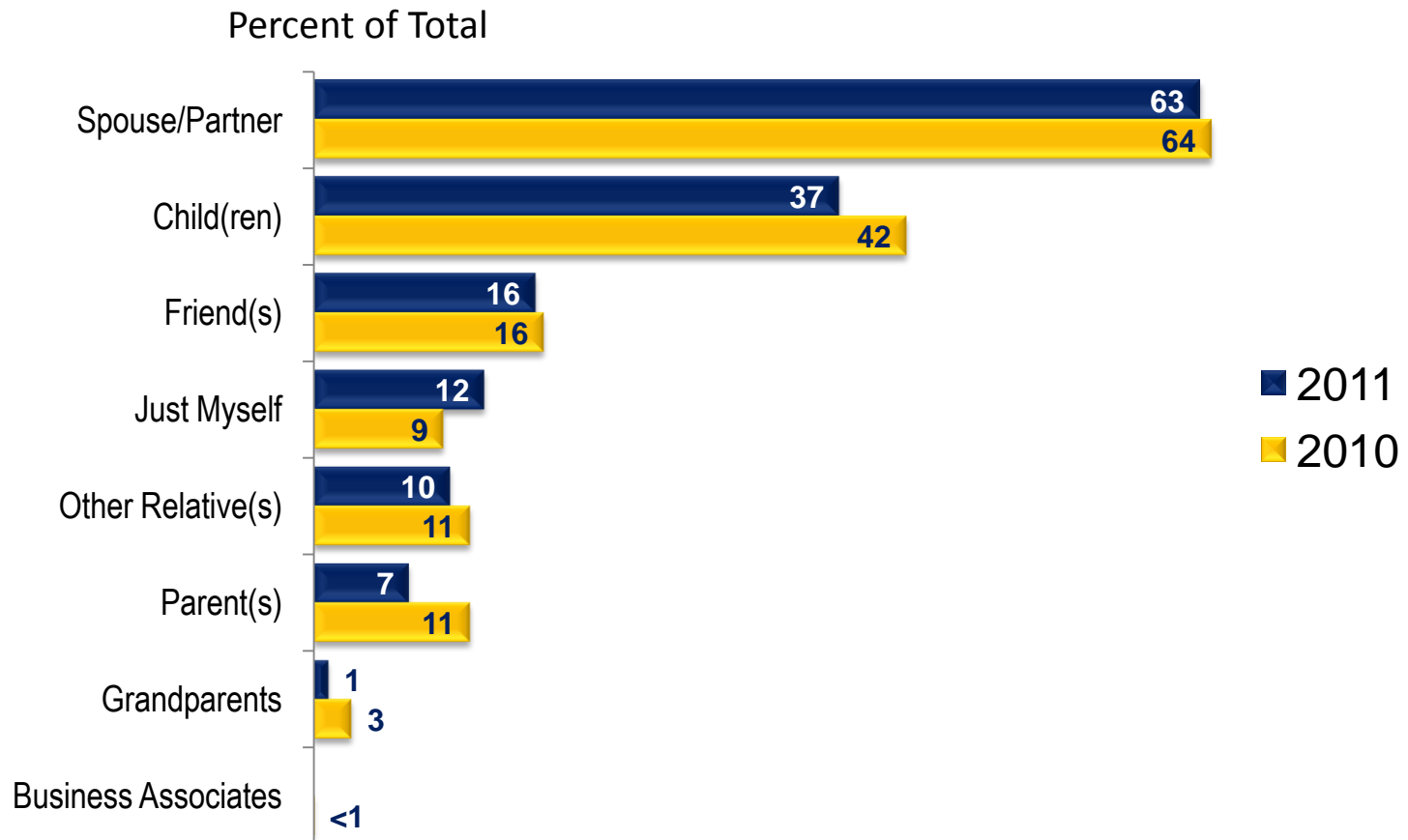
Base: Marketable Day-Trips



Composition of Travel Party



Base: Marketable Day-Trips



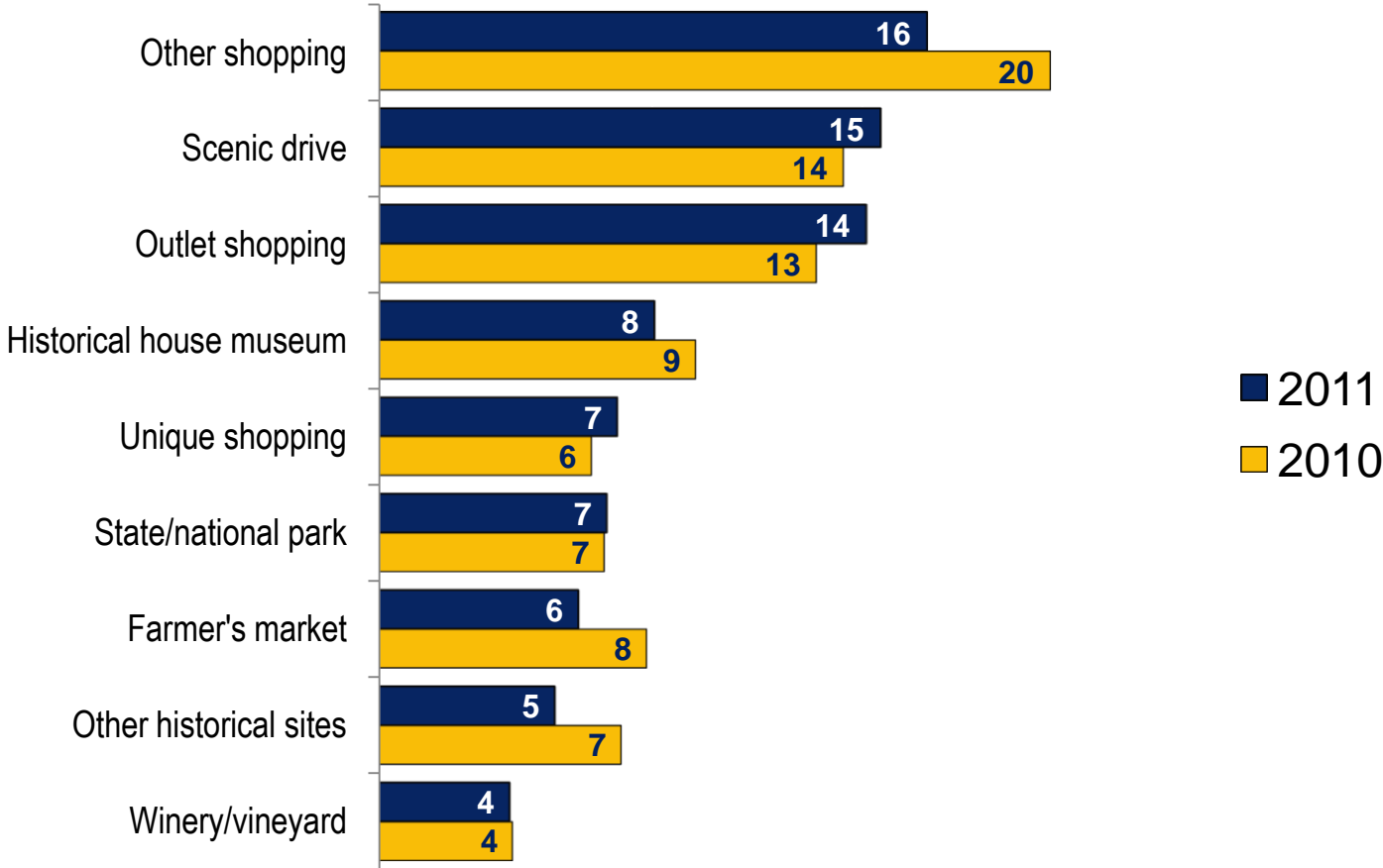
Trip Experiences — Marketable Day-Trips

Things Seen and Experienced on Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total

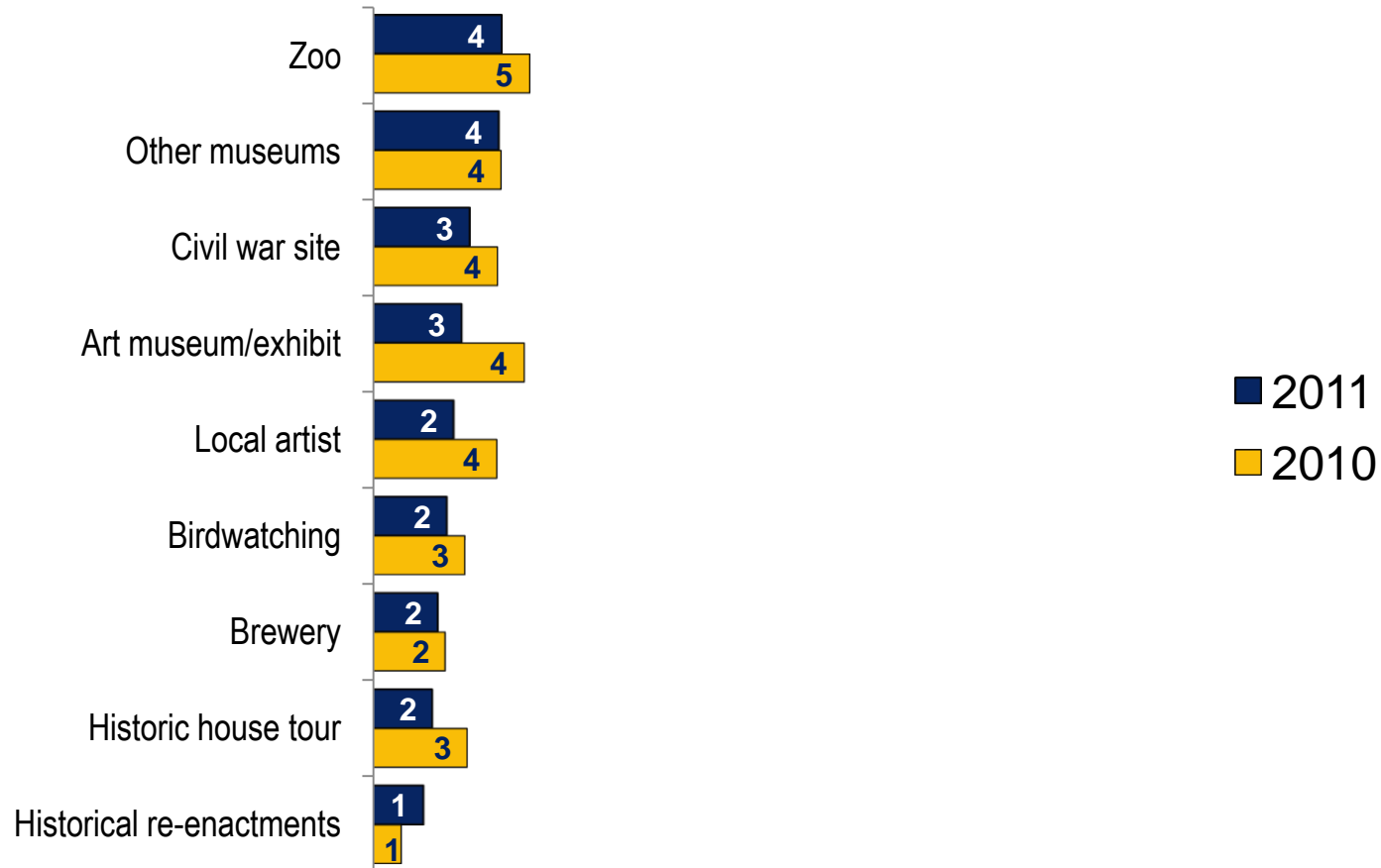


Things Seen and Experienced on Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

Percent of Total

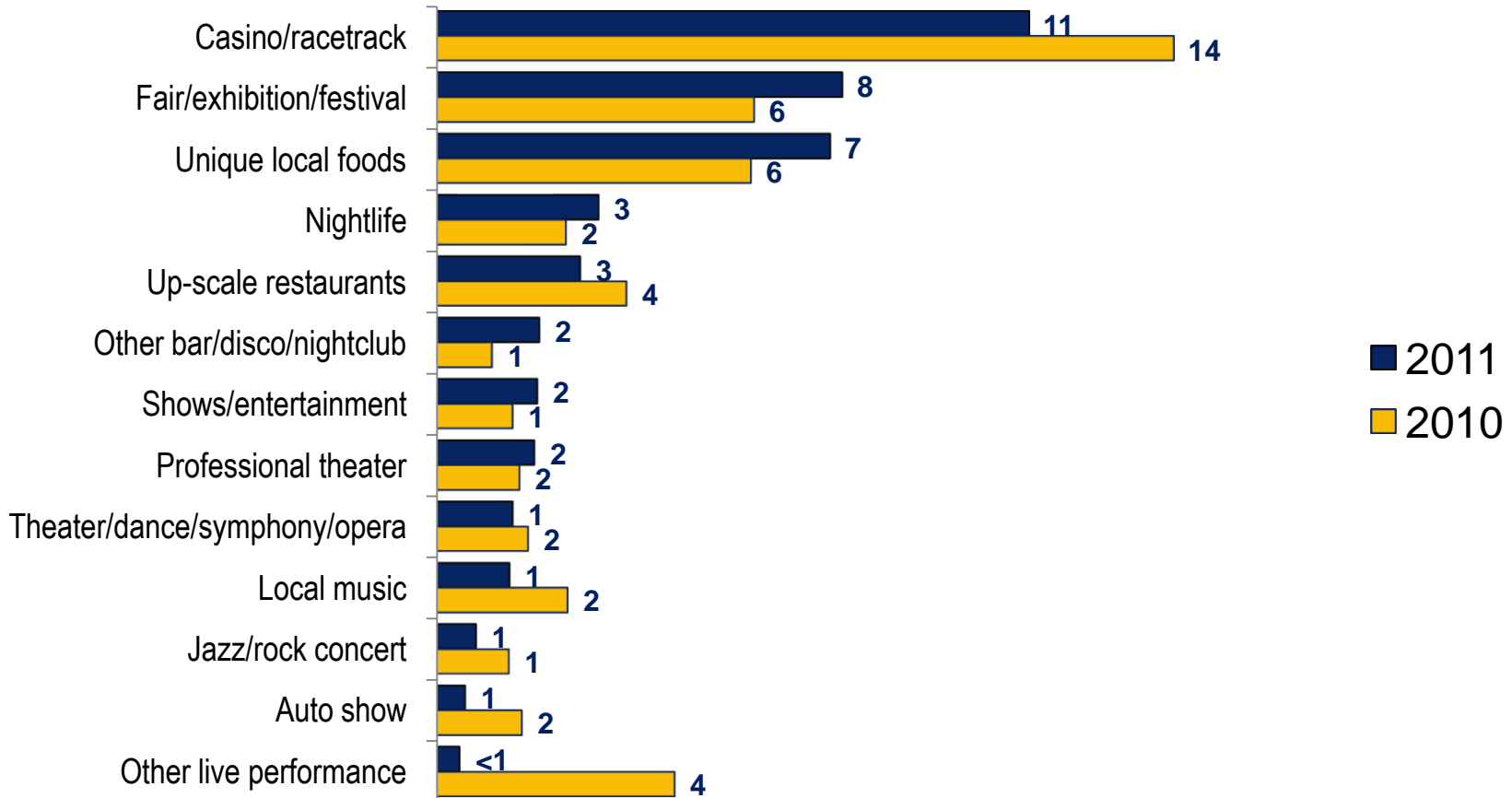


Dining/Entertainment



Base: Marketable Day-Trips

Percent of Total

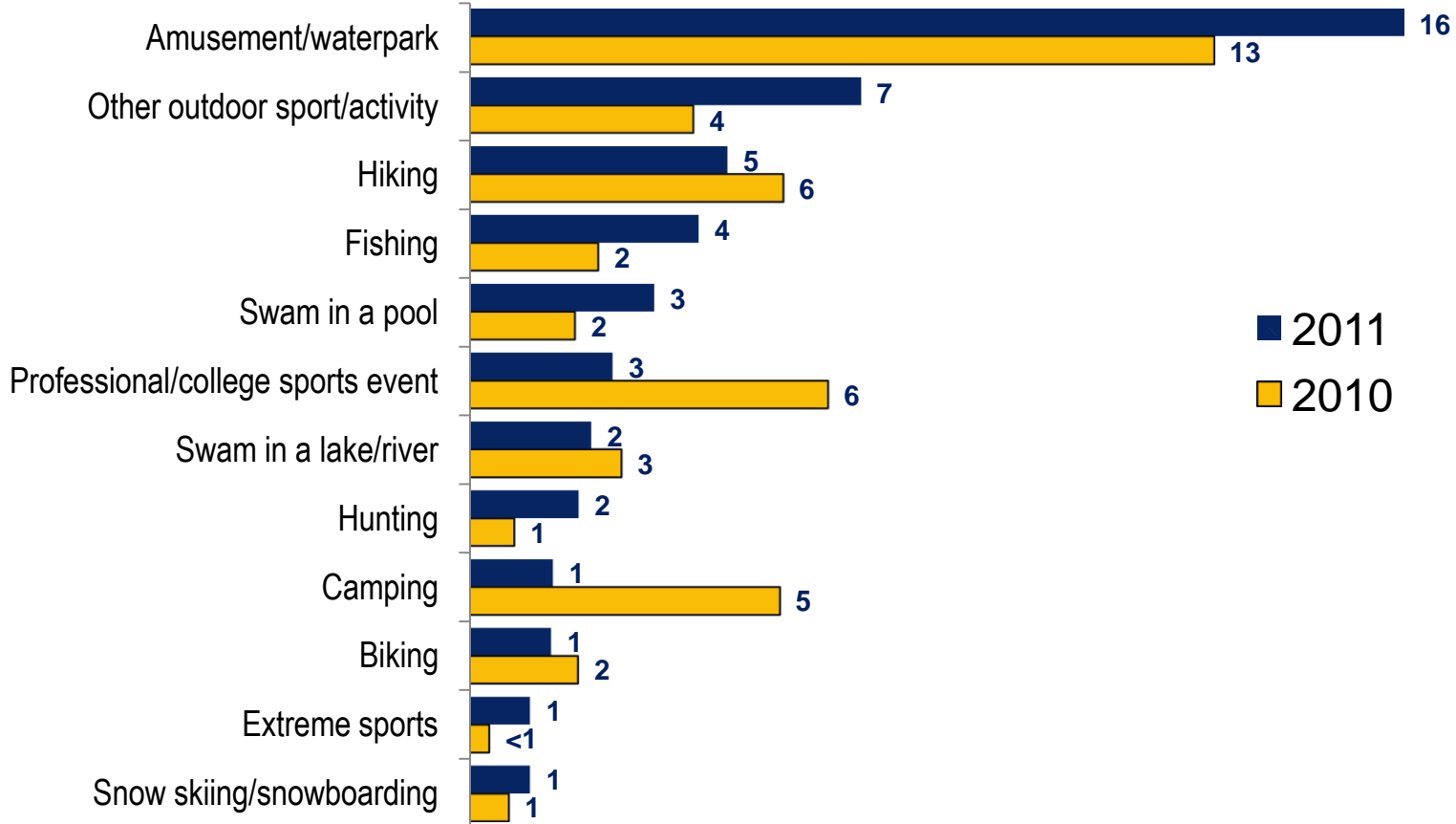


Sports and Recreation



Base: Marketable Day-Trips

Percent of Total



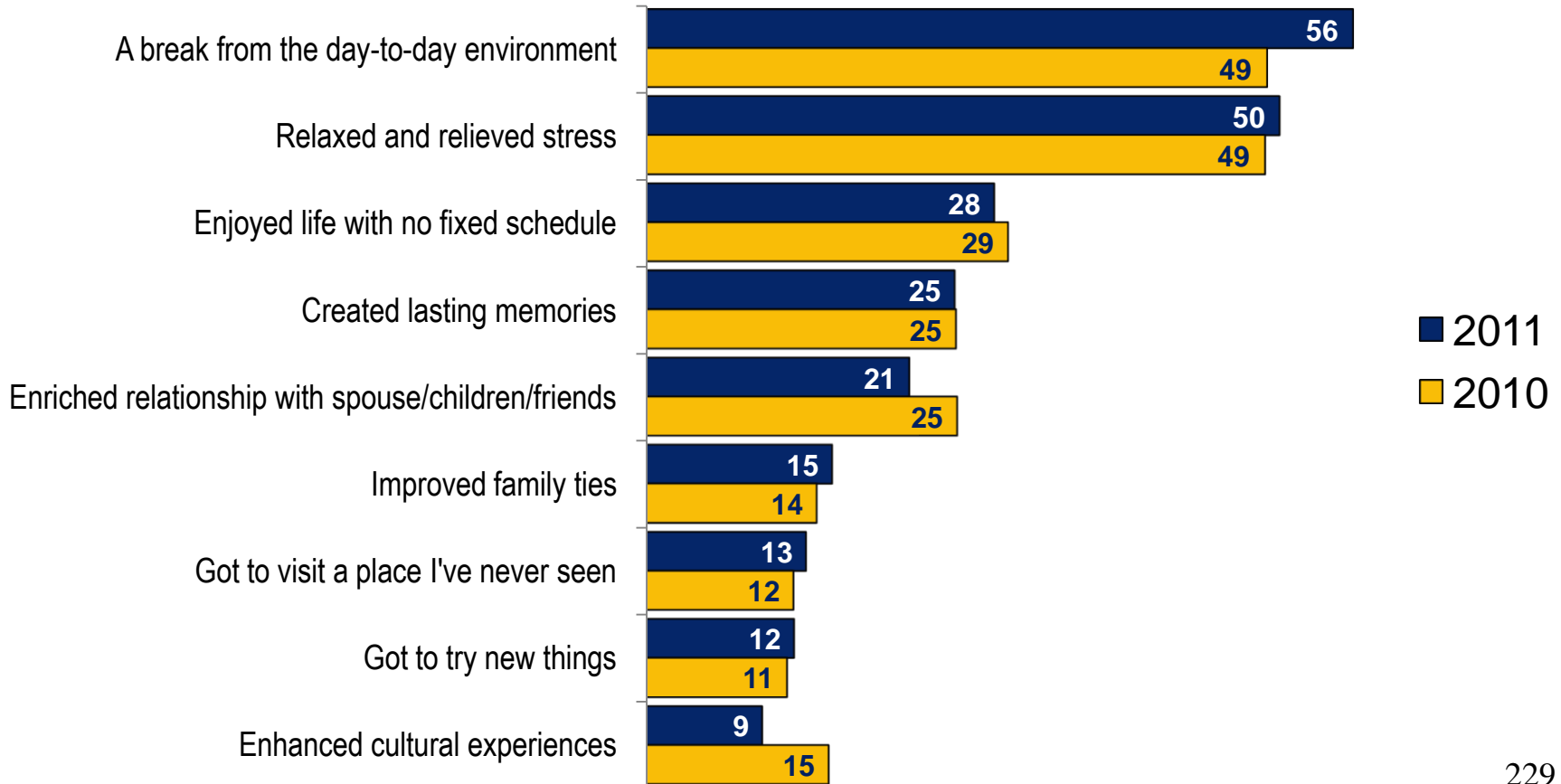
Trip Benefits — Marketable Day-Trips

Benefits From Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total



Benefits From Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

