

Pennsylvania's Annual Traveler Profile 2013 Travel Year

December 2014

Table of Contents



	<u>Page</u>
Introduction.....	4
Research Method.....	5
Executive Summary.....	7
Detailed Findings.....	23
Size & Structure of the U.S. Overnight Travel Market.....	24
Size & Structure of Pennsylvania’s Travel Market	30
Pennsylvania Marketable Overnight Trips.....	45
Origin Markets	46
Traveler Profile	55
Trip Planning & Booking	67
Trip Characteristics	87
Trip Experiences	96
Activities by Origin Market of Traveler.....	102
Activities by Absence/Presence of Children in Household.....	108

Table of Contents (cont'd)



	<u>Page</u>
Marketable Overnight Trips (cont'd)	
Regional Attractions Visited.....	110
Importance of Factors In Choice of Pennsylvania Tourism Region.....	140
Product Delivery.....	163
Trip Benefits	184
Pennsylvania Marketable Day-Trips.....	187
Origin Markets.....	188
Traveler Profile	191
Trip Planning & Booking.....	202
Trip Characteristics	219
Trip Experiences.....	224
Trip Benefits	230

Introduction



2013 OVERVIEW

- Travel and tourism is an important industry for Pennsylvania, providing tens of thousands of jobs for the state's residents and generating hundreds of millions in tax revenues for the state and local communities.
- In 2013, Pennsylvania hosted an estimated 189.8 million visitors (as measured in person-trips) – a slight increase (+0.3%) from the previous year's total of 189.2 million.
- The 0.6 million increase in PA's total visitor volume was derived from the day-trip segment, which posted a 0.6% increase in the number of travelers compared to the slight decrease (-0.3%) for the overnight segment.
- Nationally, total overnight visitor volume grew 2%, reaching a new record high level.

Research Method



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 panel members is sent an e-mail invitation to participate in the survey with a reminder e-mail sent several days later to non-responders.

For the 2013 travel year, this produced 229,726 trips for analysis nationally – 153,730 for the overnight segment and 75,996 for day trips.

Research Method (cont'd)



- The **Travel USA**[®] program identified 5,658 survey respondents who visited Pennsylvania on an overnight trip in 2013 and 4,577 on a day-trip.
- 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 2,367 total responses for the overnight segment and 1,054 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.



EXECUTIVE SUMMARY

Executive Summary



PENNSYLVANIA VISITOR VOLUME

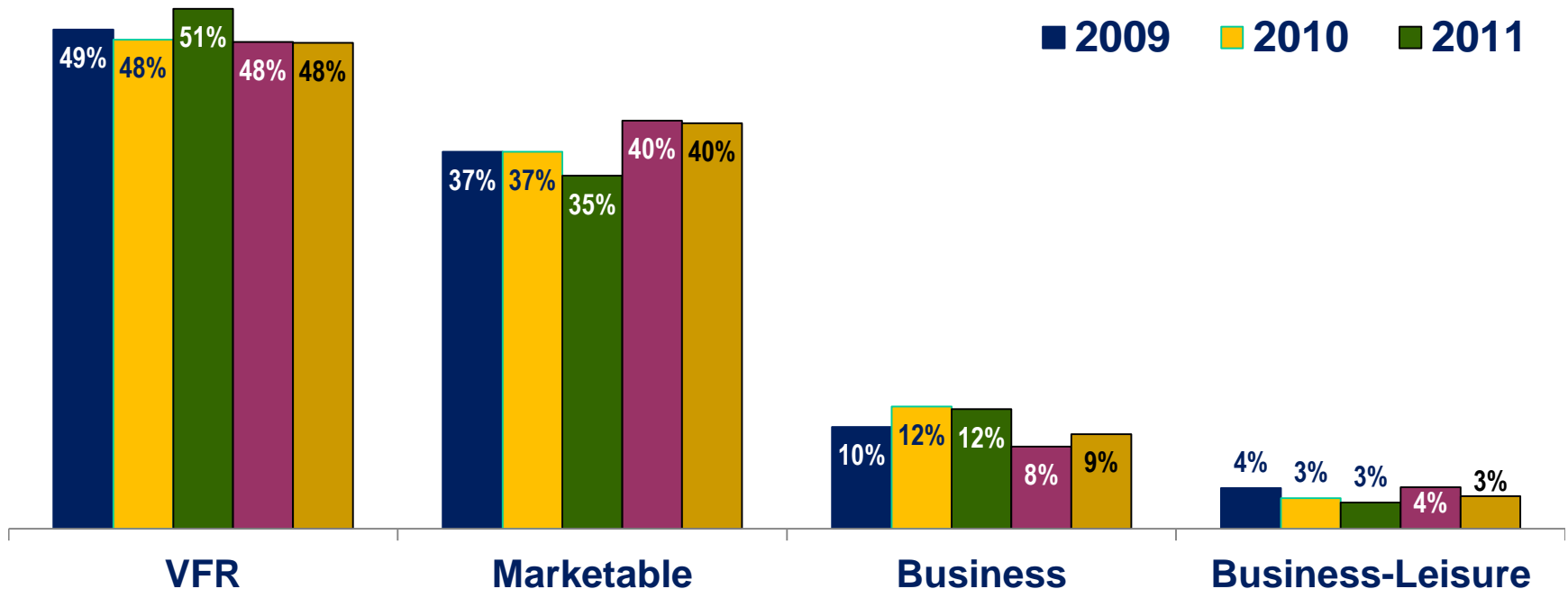
Pennsylvania hosted an estimated 189.8 million travelers in 2013 (measured in “person-trips”), a 0.3% increase from 2012.

- As in prior years, slightly more than a third of travelers (64.8 million) stayed overnight, a small decrease from 2012 (-0.3%).
 - Visiting friends/relatives (VFR) remained the primary reason for an overnight stay in PA accounting for 48% of the overnight total (well above the 44% US average).
 - Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second leading category accounting for 40% of PA’s overnight travel, or an estimated 25.8 million travelers – down 1% from 2012.
 - Nevertheless, the share of PA overnight travel attributable to marketable trips remained well above the 37% average for the years following the recession.
 - For comparison, the marketable overnight segment was responsible for 43% of total US overnight travel in 2013 – a nearly 0.7 percentage point increase in the segment’s overall share of total overnight travel from 2012.

Executive Summary



Main Purpose for Pennsylvania Overnight Travel 2009 - 2013



Executive Summary



PENNSYLVANIA DAY-TRIP VISITOR VOLUME

- Pennsylvania hosted an estimated 125.0 million day-trip travelers in 2013 – a 0.6% increase from 2012.
 - Marketable trips continued to account for 55% of PA's day-trip travel, or an estimated 68.8 million travelers, a proportion exceeding the 51% US average and the 40% state average for overnight travel.
 - Visiting friends/relatives (VFR) was the second leading reason for a PA day-trip in 2013, accounting for 36% of the day-trip total (up 1.5 percentage points from 2012) – below the 38% US average and well below the 48% average for PA's overnight travel segment.
 - Business and Business-Leisure travel accounted for 7% and 2%, respectively, of PA's 2013 day-trip total – each down roughly a percentage point from 2012.
 - Overall, the relative distribution of PA's major day-trip travel types in 2013 was little changed from 2011 and 2012.

Executive Summary



ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Maryland, and Ohio remain the top five origin states for Pennsylvania marketable overnight and day-trip travelers, together accounting for 75% and 86%, respectively, of PA's total in 2013.
- Pennsylvania was the top origin market for PA's leisure travelers accounting for 35% of marketable overnight travelers; 46% of marketable day-trip travelers; 28% of overnight VFR travelers; and 46% of the state's day-trip VFR travelers.
- PA residents comprised a slightly smaller share of the state's leisure travel in 2013 for each of the main leisure segments than in recent years, indicating travelers are once again traveling further as the effects from the recession continue to fall.
- Pennsylvania was also the top origin state for PA business overnight travelers continuing to account for 30% of the state total in 2013, with New York, New Jersey, and Ohio together accounting for an additional 26% of PA's overnight business travelers.

Executive Summary



PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region remained the leading region for total overnight visitation (i.e., includes business, leisure and VFR travelers) of the state's 11 tourism regions, with an estimated 14.7 million person-trips in 2013, followed by Pittsburgh and Its Countryside (11.0 million), Dutch Country Roads (10.4 million), and the Pocono Mountains region (8.6 million) region.
- These four regions accounted for 59% of Pennsylvania's total overnight person-trips in 2013, a two percentage increase from the previous year.
- The Dutch Country Roads and Philadelphia and The Countryside regions were the state's two leading regions for marketable overnight leisure trips in 2013, followed by the Pocono Mountains and Pittsburgh and Its Countryside regions.
- With their relatively large population bases, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions remained the leading destinations for both PA overnight business and VFR (visiting friends and relatives) travel in 2013. 12

Executive Summary



Why Pennsylvania?

Nearly half (47%) of Pennsylvania's marketable overnight visitors traveled to/within the state because they had visited before and wanted to see more in 2013 or lived nearby (21%), which was a 4 percentage point increase from 2012.

A recommendation from friends/relatives was responsible for 18% of the state's marketable overnight visitors in 2013 – a 1 percentage point increase from 2012 and 5 percentage point increase compared to 2011.

PA's tourism industry is clearly cultivating a positive image and experience for travelers evidenced by the fact that nearly two-thirds of marketable overnight travelers were either return visitors or had traveled to/within the state in 2013 based on a personal recommendation from someone they trusted.

Advertising influenced 6% of marketable overnight travelers' decision to visit Pennsylvania in 2013, the same proportion who were influenced by a tourism article or news story they heard or read with both down two percentage points from 2012.

Executive Summary



Planning and Booking by Marketable Overnight Travelers

The planning cycle for today's time-pressed travel consumers is short with 42% of PA's 2013 marketable overnight travelers planning their trip in a month or less – an 11 percentage point increase from 2012 – and another 20% within two months.

The internet remains the single most important planning source – used by 44% of PA's marketable overnight travelers in 2013, followed by personal experience (17% of travelers) and advice from friends/relatives (12%).

Nearly half of PA's marketable overnight travelers (46%) used the internet to research and plan their accommodations in 2013, while more than a third relied on the internet for maps or directions (35%); close to a third to find out about local activities and attractions (30%); and a quarter for information on restaurants (24%).

In terms of technology used, nearly half of PA's marketable overnight travelers used a desktop (47%) or laptop (46%) computer in planning their 2013 PA trip. While only 16% used a smartphone to plan their trip, usage soared to 53% during the trip.

Executive Summary



Use of Social Media by Pennsylvania's Marketable Overnight Travelers

Almost three-quarters of PA's marketable overnight leisure travelers (72%) used social media in some capacity in 2013 – a bit below the 77% nationwide average.

Not surprisingly, PA travelers in the younger age groups are far more likely to use social media before, during, and after their trips than older travelers, i.e., 84% of travelers below the age of 35 compared to 50% of those 65 year of age or older, although the share of travelers in the older age group utilizing social media has grown dramatically over the past few years.

Posting travel photos and/or videos online remained the most common social media activity in 2013 for PA's marketable overnight leisure travelers below the age of 45, while reading online travel reviews was the most common social media activity for travelers 45 years of age or older, including those in the 65+ age group.

Executive Summary



Trip Characteristics

Pennsylvania is primarily a “drive-to” destination, with the vast majority of the state’s marketable overnight travelers from out of state arriving by car, van, truck, or RV in 2013.

Short stays were the norm for the majority of marketable overnight travelers with 65% staying just one or two nights on their Pennsylvania trip in 2013 – a far higher percentage than the 52% US average. However, there was a small 1 percentage point increase in the proportion of PA travelers (9%) staying for 7 days or longer.

Pennsylvania’s marketable overnight travelers largely preferred to stay in hotels or motels (51%) in 2013, although 10% opted for housing owned by friends or relatives – a 5 percentage point increase from 2012.

A majority of PA’s marketable overnight leisure visitors traveled with a spouse or partner (58%) in 2013, with 35% traveling with children.

Executive Summary



Trip Experiences

Shopping (both outlet and “other” shopping), scenic drives, and visiting historical houses/museums remained the top three trip experiences of PA’s marketable overnight travelers in 2013.

Participation rates for most types of trip experiences by PA’s marketable overnight travelers in 2013 were little changed from the prior year, except for the proportion of travelers visiting zoos returning to a level more consistent with the 6% long-term trend.

Shopping, scenic drives, and visiting historical houses/museums were also popular with the state’s marketable day-trip travelers in 2013.

Executive Summary



Traveler Priorities and Expectations

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

The top travel destination priorities of PA's marketable overnight leisure travelers in 2013 were in descending order: exciting, adult atmosphere, worry free, family friendly, climate, affordable, sightseeing opportunities, unique, the entertainment, luxurious, and sports and recreation.

As in prior years, 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, on average, viewed the state more favorably on each of the priorities than non-resident travelers who visited the state.

Executive Summary



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 prior years, the primary benefit of travel for PA's marketable overnight and day-trip leisure visitors in 2013 was to relax and relieve stress – cited by nearly two-thirds of the survey's respondents – followed by a break from people's day-to-day responsibilities.

Creating lasting memories and improving and enriching personal relationships with family and/or friends was also a key benefit for PA's marketable overnight and day-trip travelers in 2013. Having no fixed schedule rounded out the top 5 list of benefits from their PA trip.

Of lesser importance was visiting places never seen before and trying new things, which were cited by slightly under 20% of overnight and day-trip survey respondents.

Executive Summary



DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

As in prior years, Pennsylvania's 2013 marketable overnight travelers were generally higher income, well-educated, married adults.

- Pennsylvania's marketable overnight travelers had a median age of 41.7 years – unchanged from 2012 and slightly above the US median of 40.9 years of age, but below the median age of the state's marketable day-trip travelers (44.5 years).
- The majority were married or with a partner (63%) – slightly above the 62% US average and below that of marketable day-trip travelers (64%) in 2013.
- A majority of travelers (53%) had children under 18 years of age living at home – a proportion above the US average of 50% and well above that of the state's marketable day-trip travelers (46%).
- The median household income of the state's marketable overnight travelers was \$63,330 or slightly above the \$62,660 US median in 2013, with close to a quarter (23%) of PA travelers with an annual household income of at least \$100,000.

Executive Summary



TRAVELER CHARACTERISTICS BY AGE

The averages noted on the previous slide mask key differences based on age, most notably the presence of children in the household.

- The proportion of marketable overnight 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>
18-24	49%
25-34	64%
35-44	81%
45-54	57%
55-64	19%
65+	8%

- Pennsylvania's marketable overnight travelers were far more likely to travel with children than the U.S. average for every age demographic except the youngest.

Executive Summary



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 (79%).
- There was a distinct shift to married/with a partner (63%) for the 25-34 age group, with a third still reporting as single.
- The vast majority of the state's marketable overnight travelers aged 35 or above were married/living with a partner (above 70% for each group).
- While the overwhelming majority of travelers in the 65+ age group were married or living with a partner (76%), not surprisingly they had the highest proportion who were widowed while travelers in the age 55-64 age demographic had the highest proportion reporting they were divorced or separated.

Detailed Findings

Size & Structure of US Overnight Travel Market

Size and Structure of US Domestic Travel Market



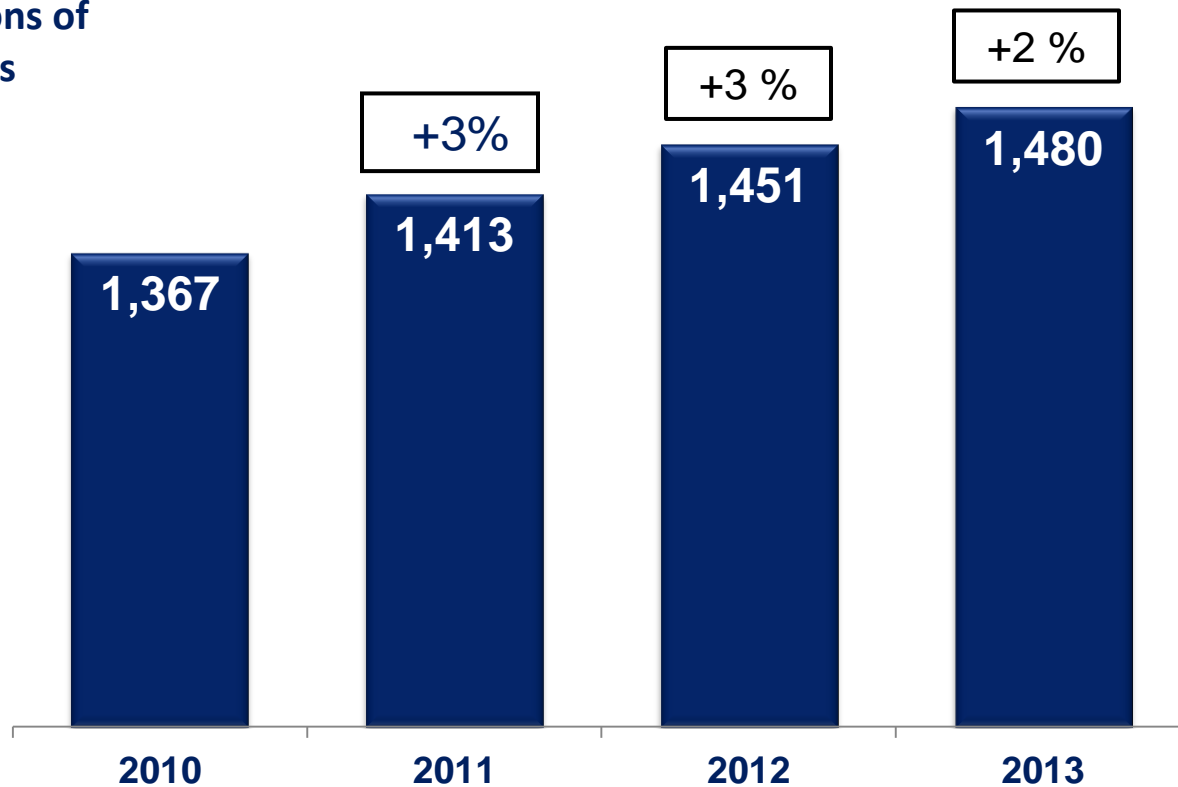
- Overnight travel by Americans increased 2% in 2013 vs. 2012.
- Of the nearly 1.5 billion trips taken, 87% were taken for leisure purposes.
- Almost half of leisure trips were to visit friends and relatives (VFR), with about 43% were of a trip type that can be influenced by marketing, and approximately 3% were business-leisure trips,.
- The top six marketable trip types were touring trips, special event travel, outdoor trips, casino trips, city trips, and resort trips.

Size of the US Overnight Travel Market 2010 to 2013



Base: Total Overnight Trips

In millions of
Trips

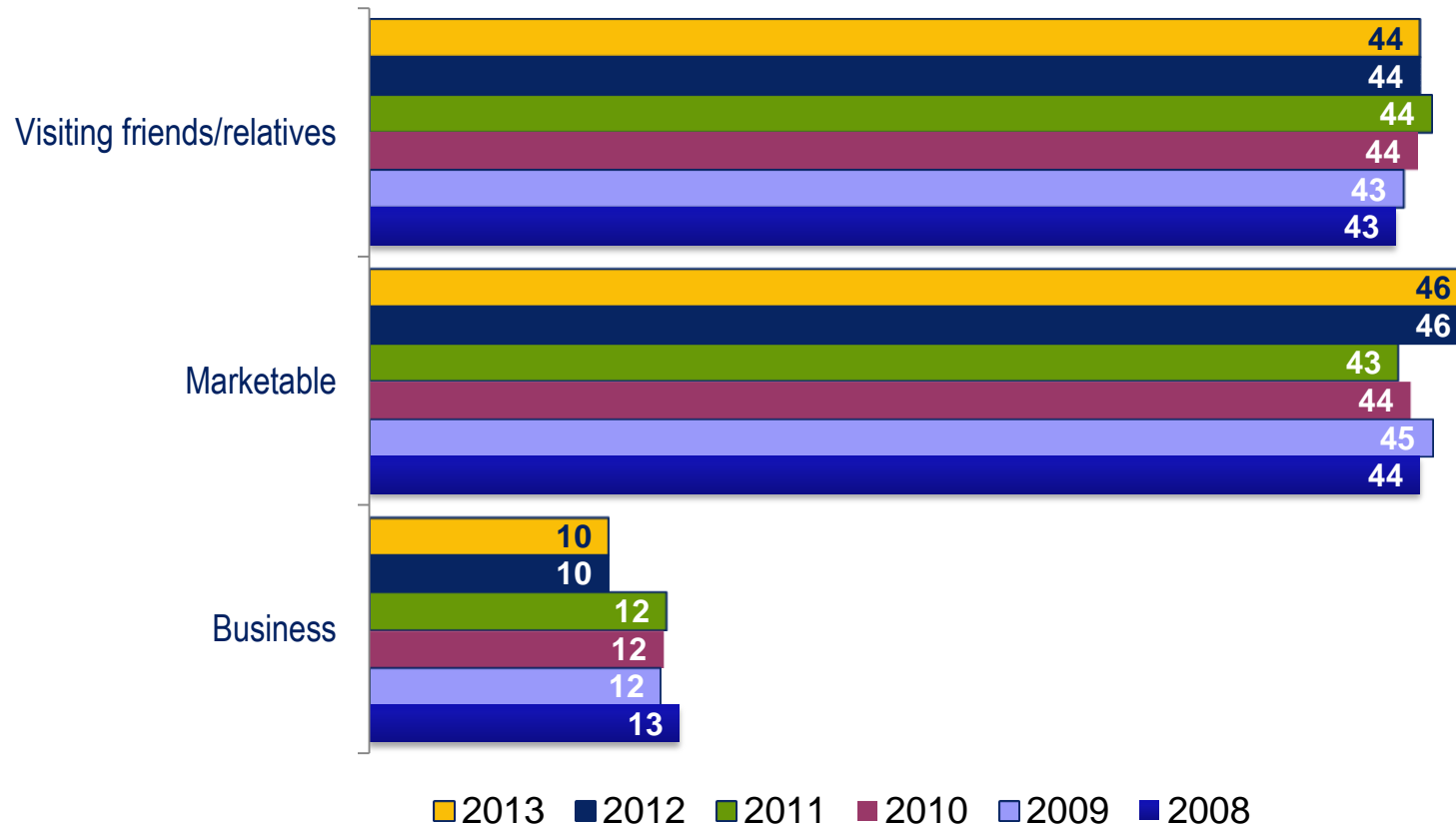


Structure of the US Overnight Travel Market — Trends



Base: Overnight Trips

Percent of Total

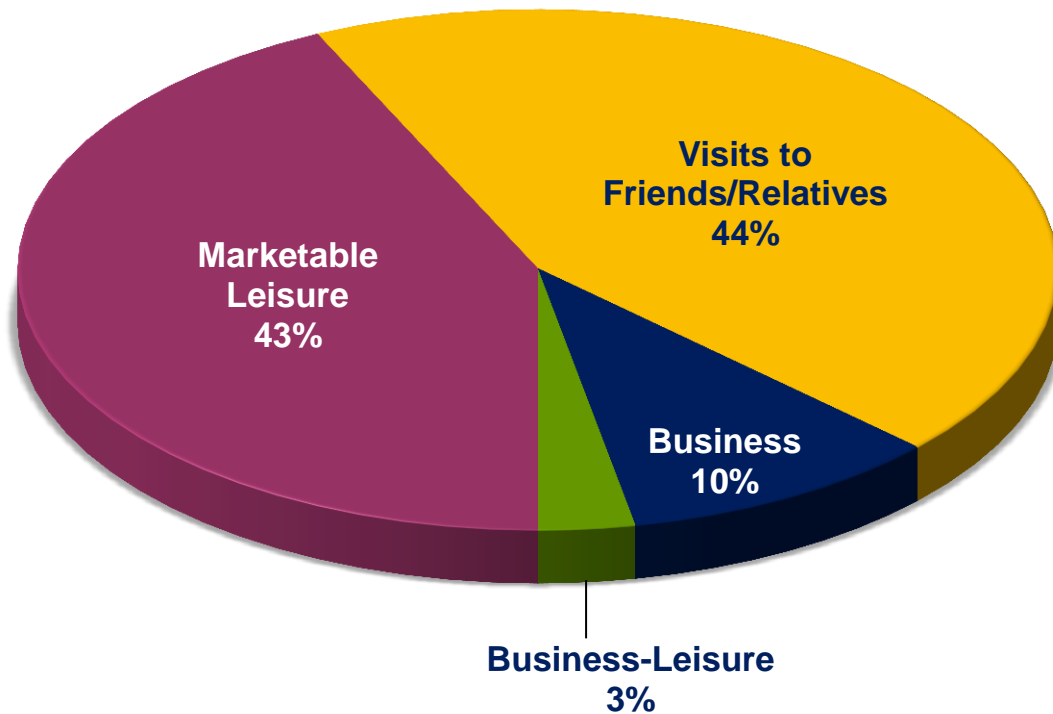


Business-Leisure trips are included in Marketable trips in this slide

US Overnight Market Segments



Base: Adult Overnight Trips

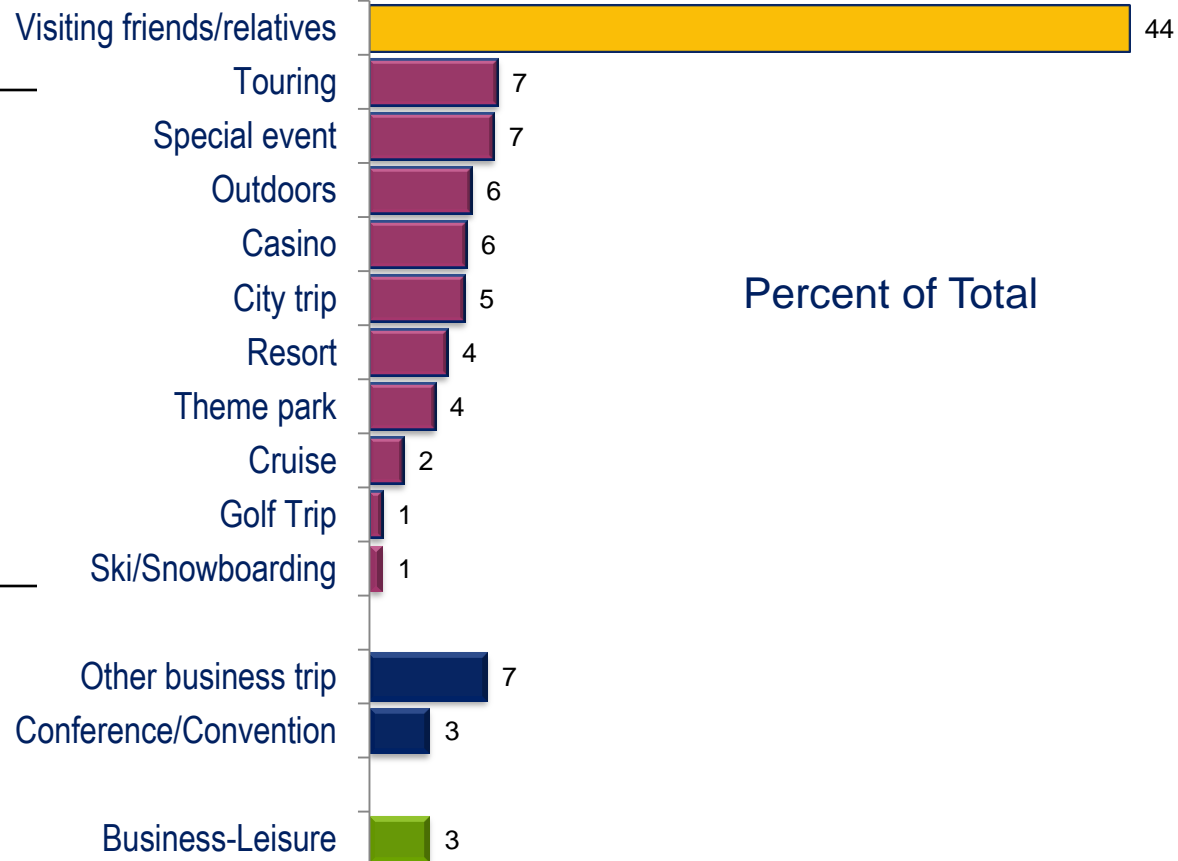


Main Purpose of US Overnight Trips in 2013



Base: Adult Overnight Trips

Marketable Trips



Size & Structure of Pennsylvania's Travel Market

Pennsylvania's Travel Market



- An estimated 189.8 million trips were taken to and/or within Pennsylvania by US residents in 2013.

34% were overnight trips and 66% were day trips.

- Of the 64.8 million overnight trips:
 - ❖ *40% were marketable trip types (trips that can be influenced by marketing, i.e., leisure trips excluding visits to friends and relatives).*
 - ❖ *Key marketable trip types for Pennsylvania in 2013 included touring, special events, and outdoors.*

Pennsylvania Day Travelers

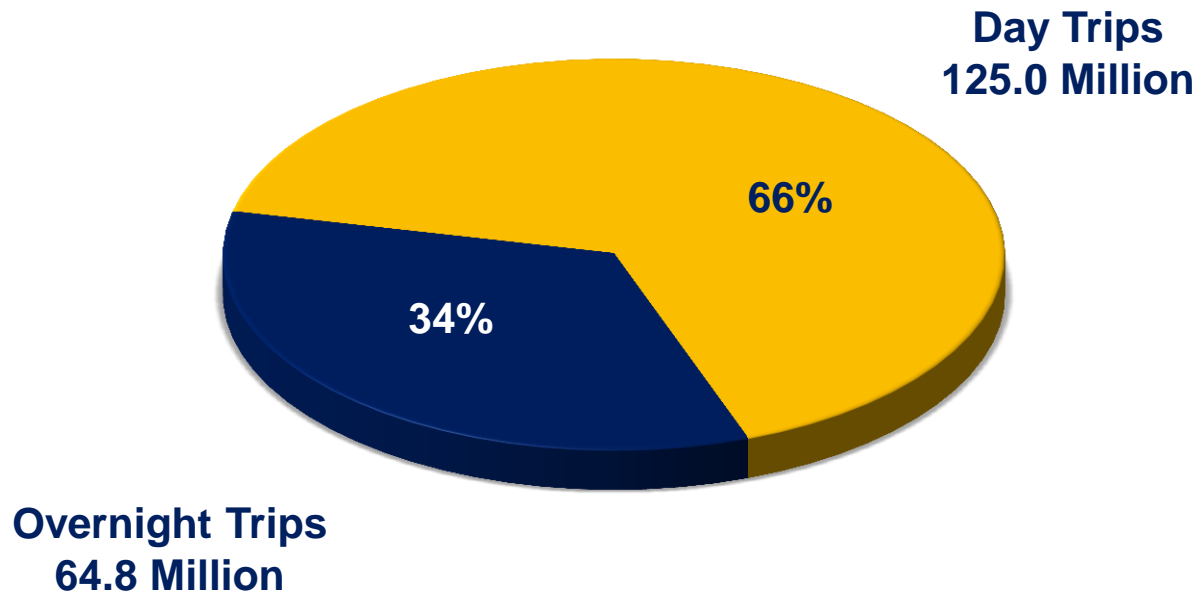


- Of the estimated 125 million day-trip travelers to and/or within Pennsylvania in 2013:
 - 55% were marketable trip types (a much higher percentage than for overnight travel).
- Key marketable day-trip types in 2013 included touring, special events, and shopping.

Total Trips To/Within Pennsylvania in 2013



Total Person-Trips = 189.8 Million

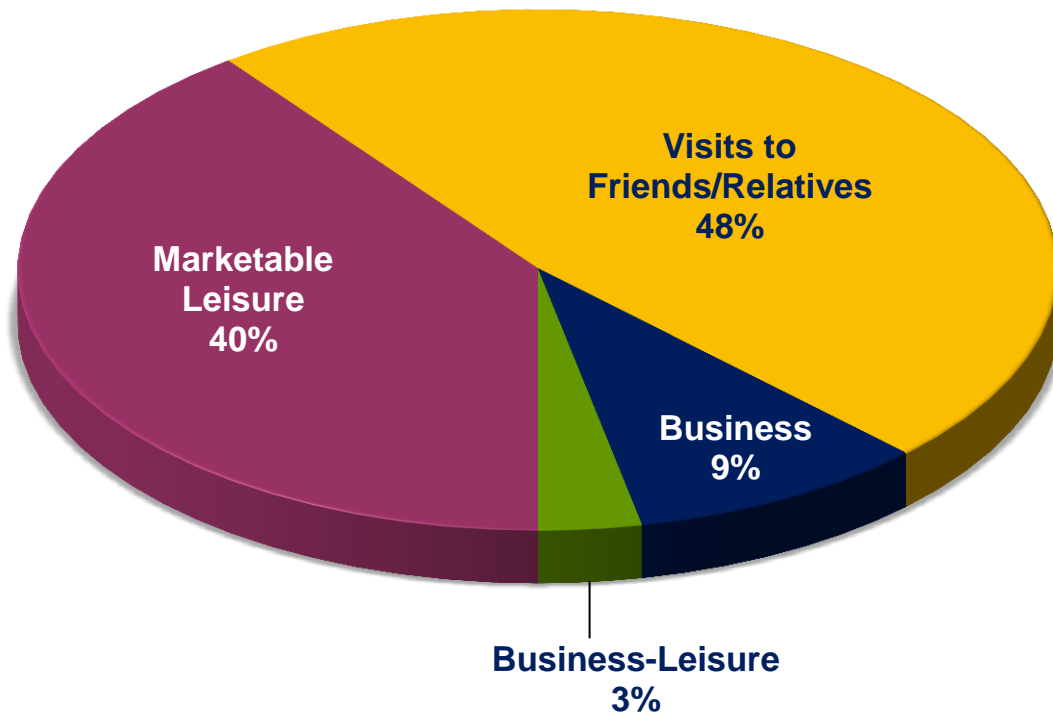


Pennsylvania's Overnight Travel Segments

Pennsylvania's Overnight Trip Market Segments



Base: Adult Overnight Trips to Pennsylvania

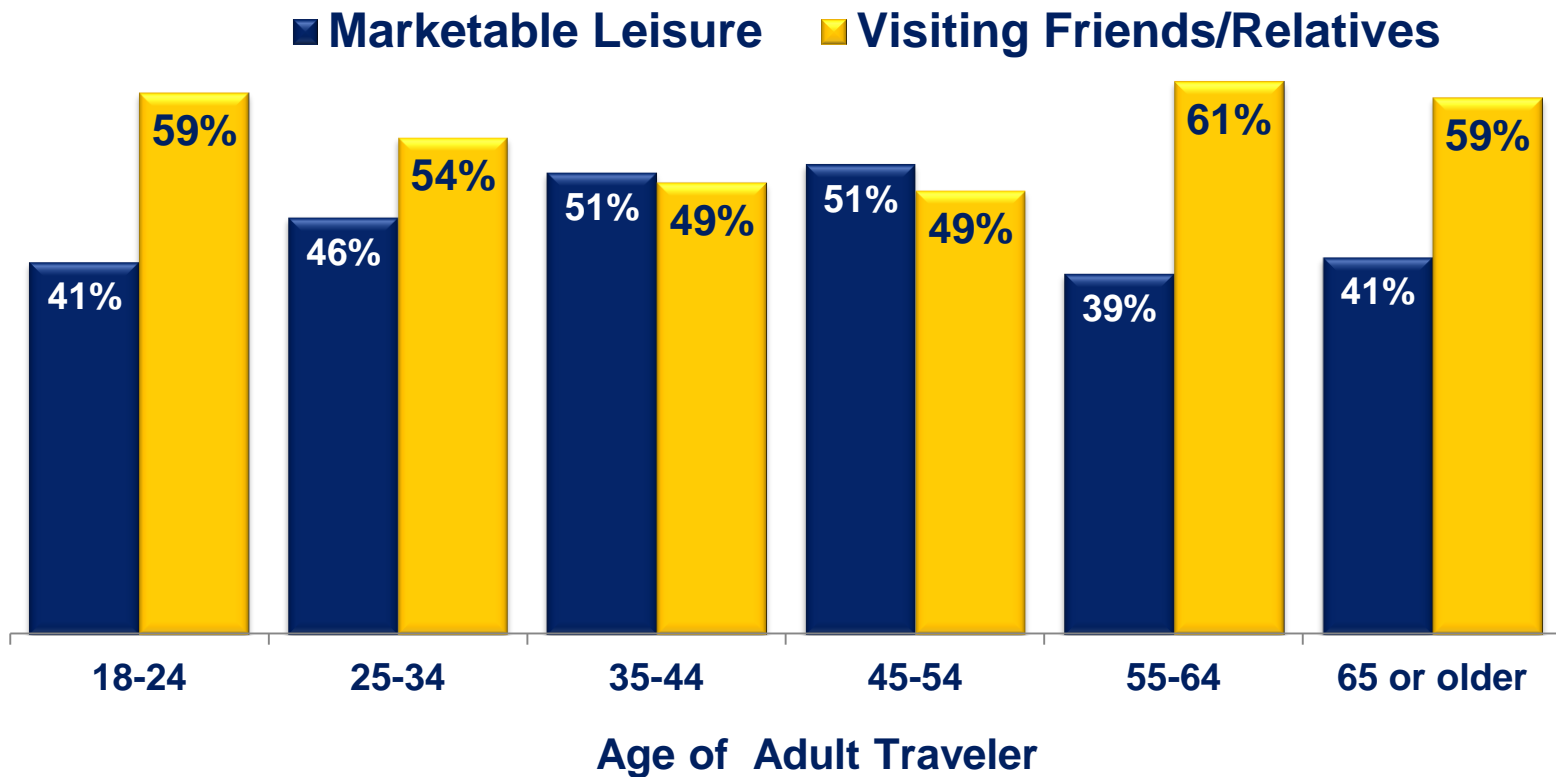


Pennsylvania's Leisure Overnight Market Segments by Age of Adult Traveler



Base: Adult Overnight Trips to Pennsylvania

Adult travelers from the youngest and oldest generations were far more likely to travel to/within PA to visit friends and family in 2013 than those in the middle age ranges.

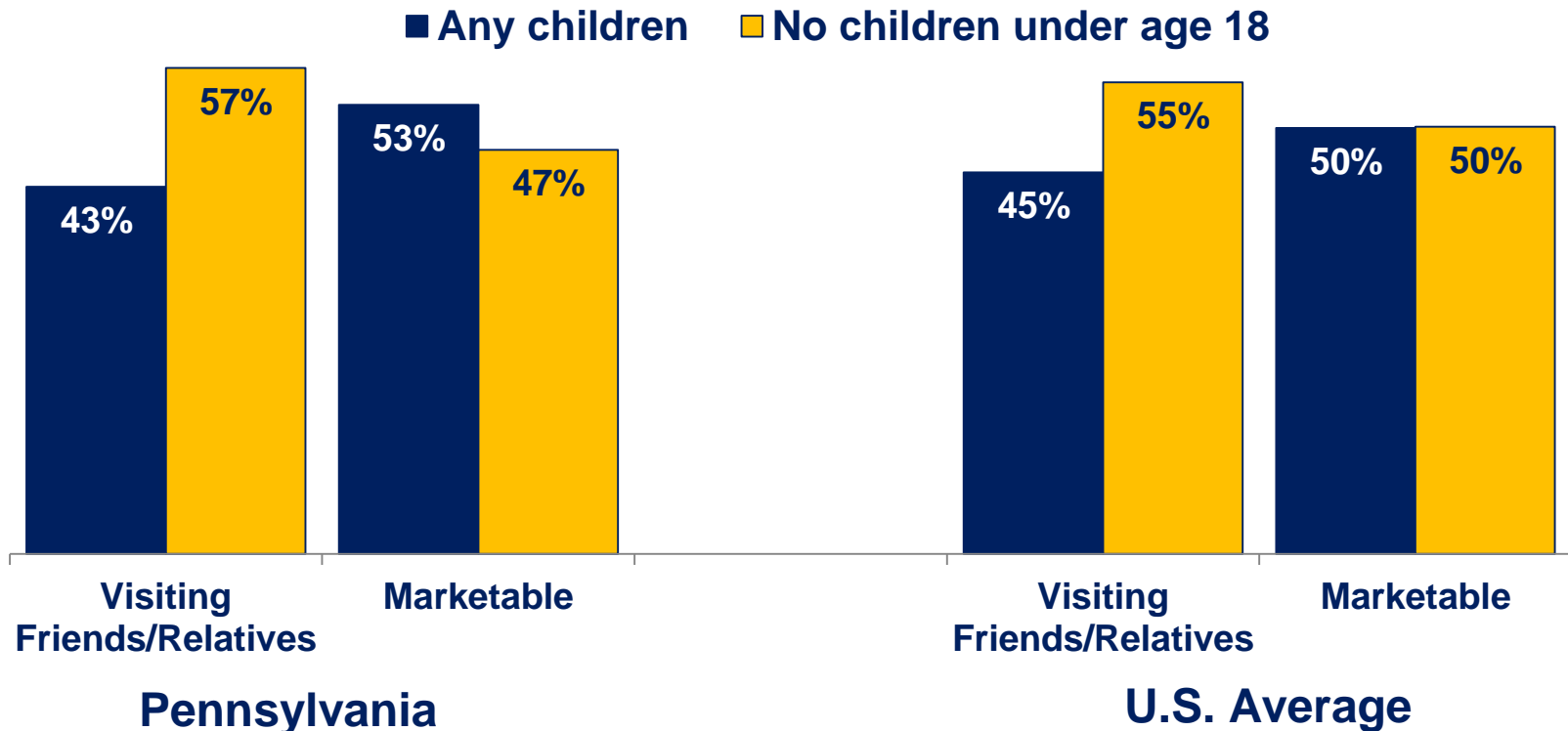


Pennsylvania and U.S. Overnight Leisure Segments By Presence of Children in Household



Base: Adult Overnight Leisure Trips

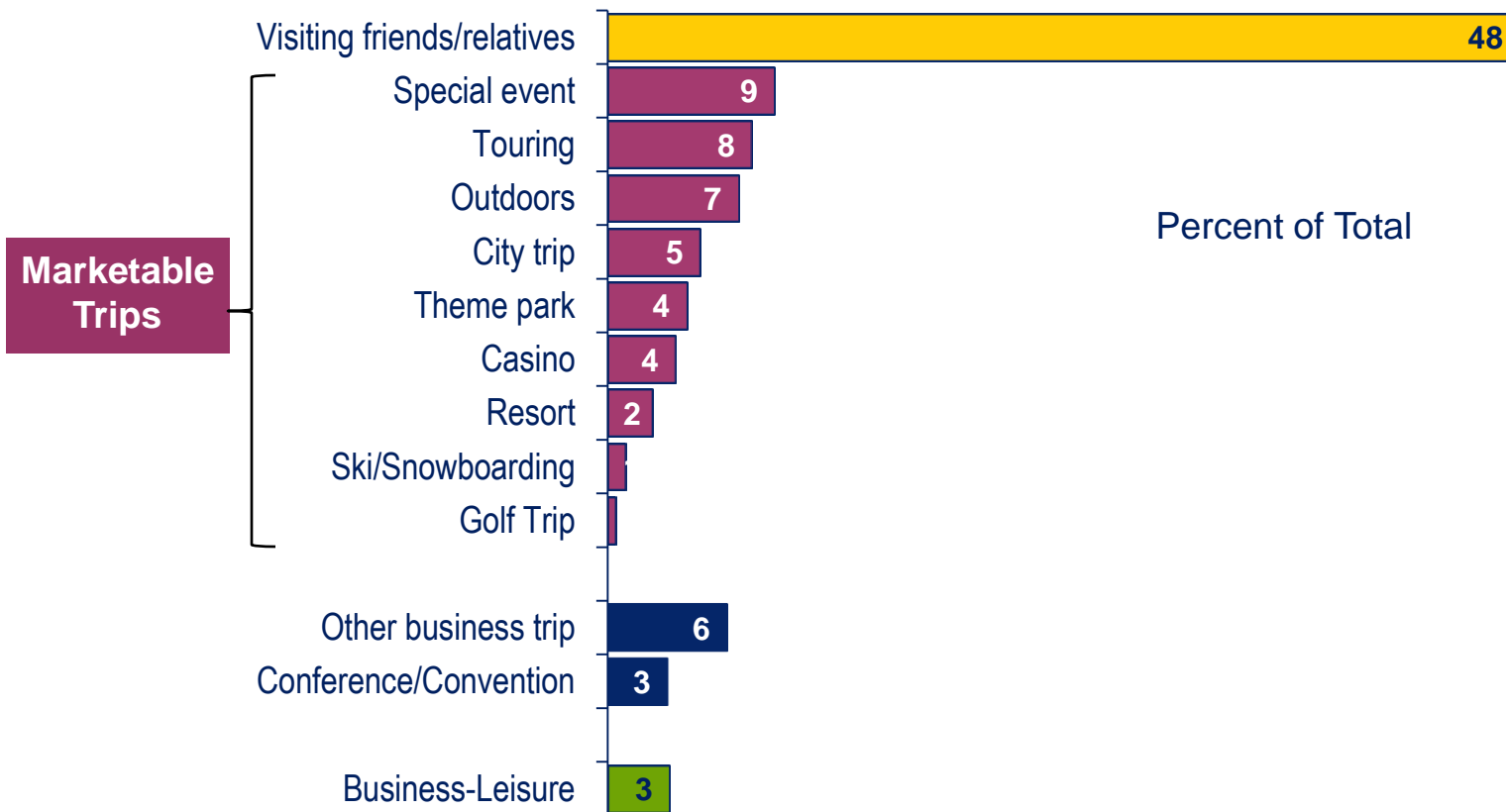
PA's marketable overnight leisure travelers were far more likely to have children under age 18 than those traveling to visit friends/relatives.



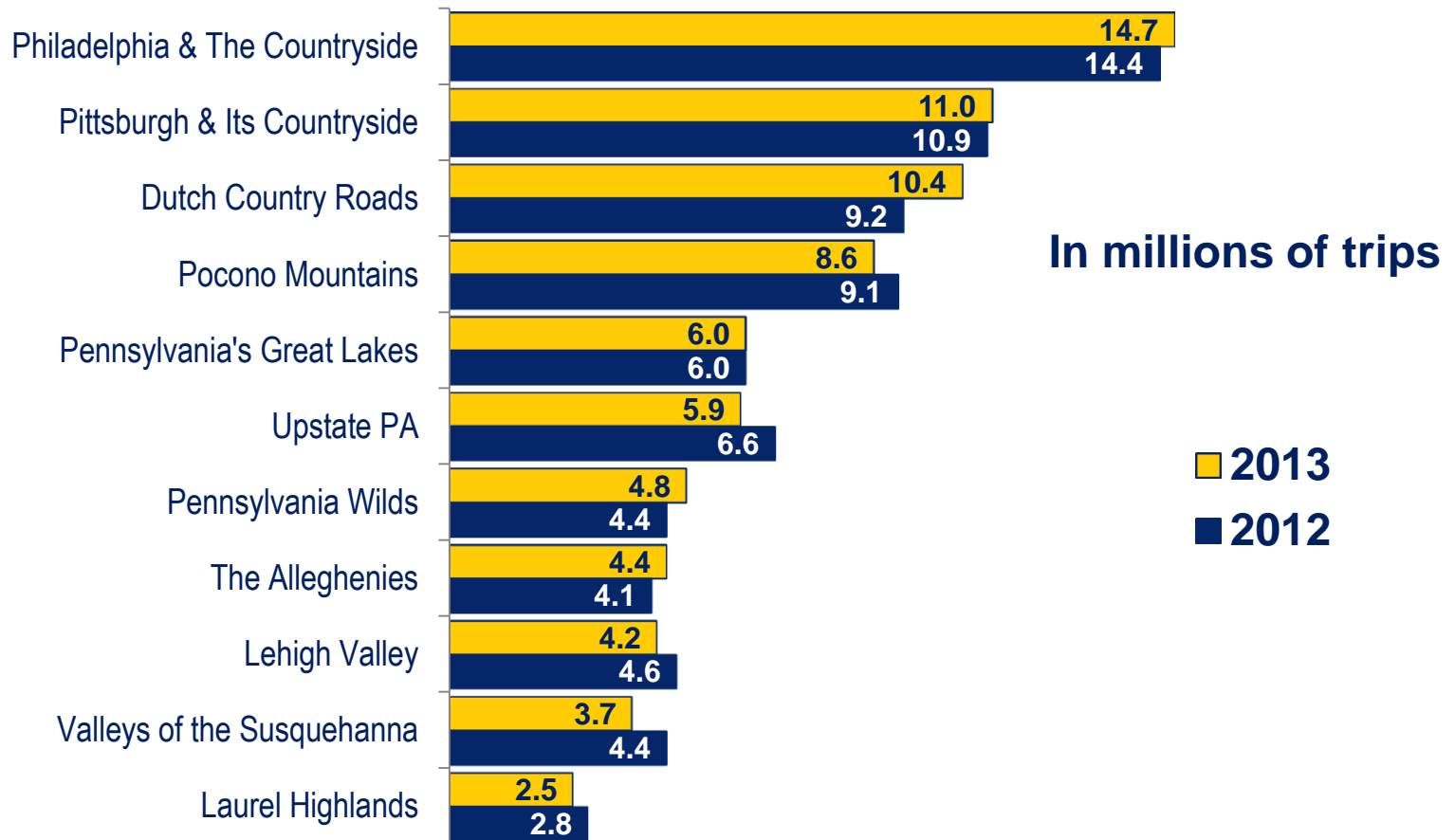
Main Purpose of Overnight Trips to Pennsylvania in 2013



Base: Adult Overnight Trips



Regions Visited on Overnight Trips*



*Spent time in region

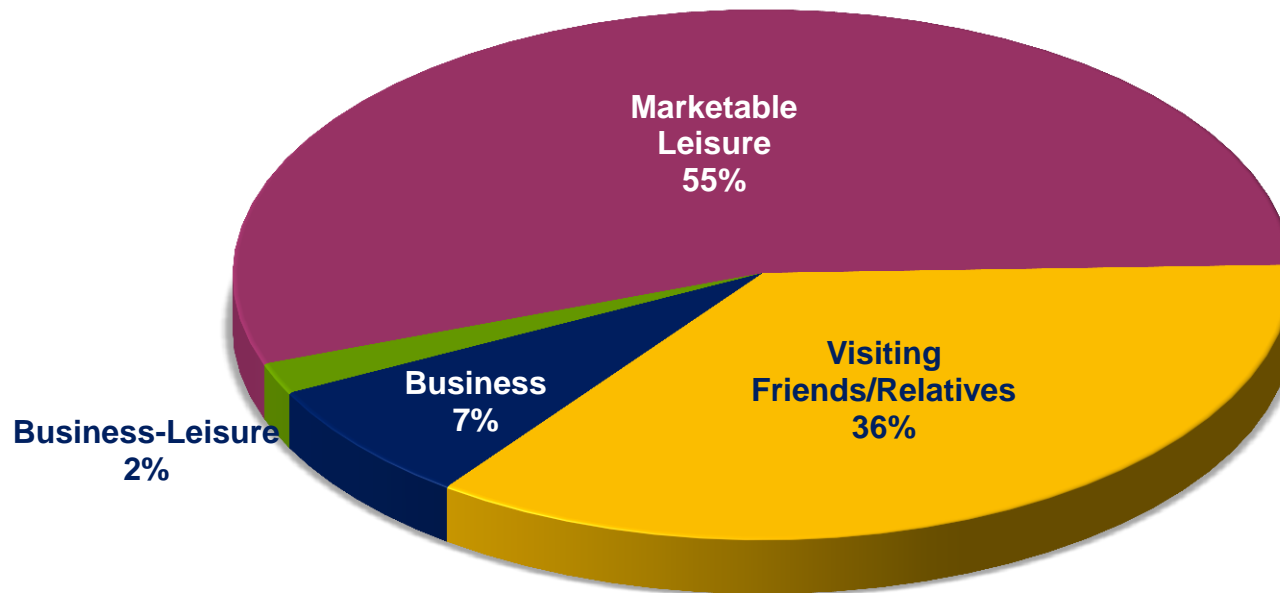
Total will add to more than State total as a number of travelers visited more than one region.

Pennsylvania's Day-Trip Travel Segments

Pennsylvania's Day-Trip Market Segments



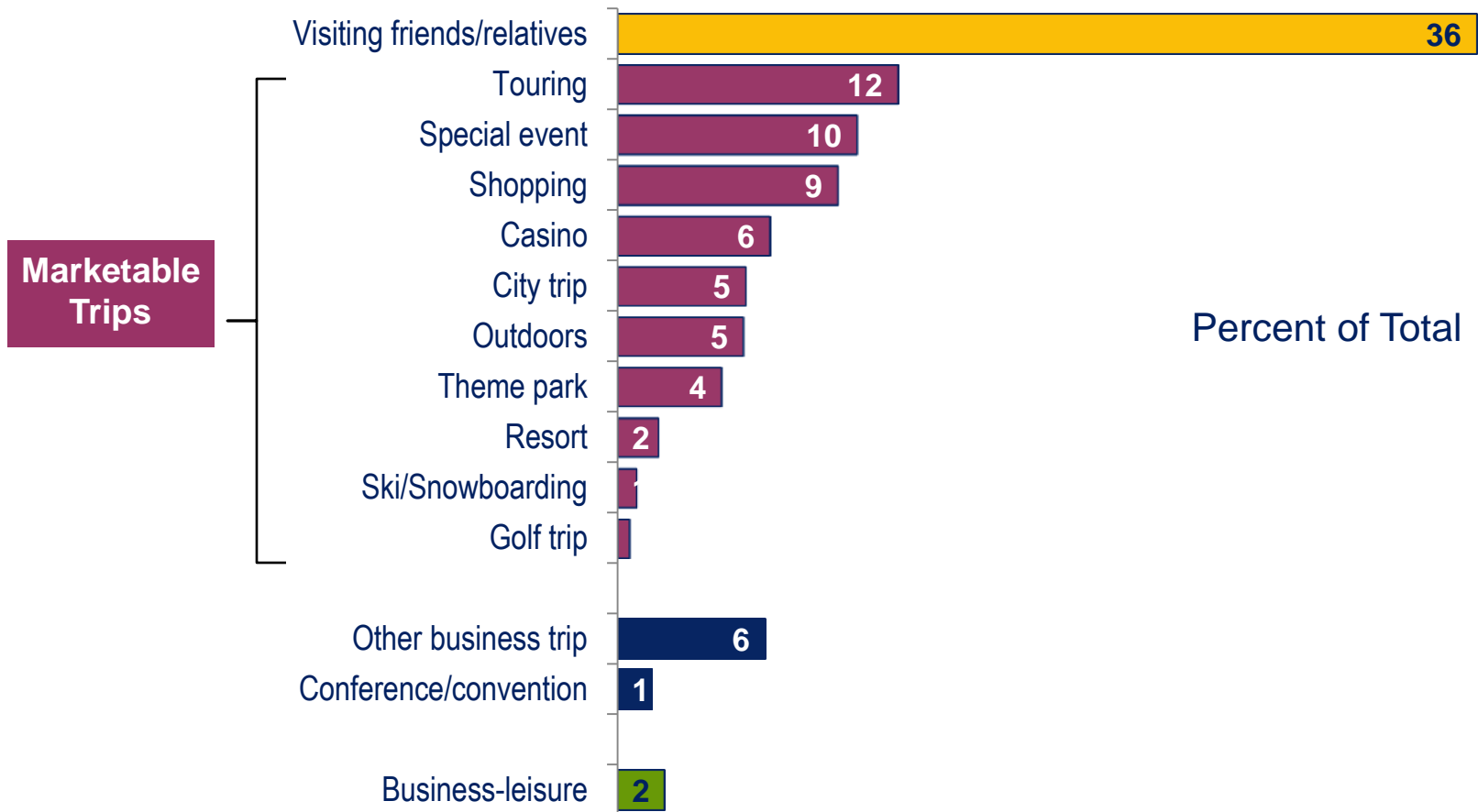
Base: Adult Day-Trips to Pennsylvania



Main Purpose of Pennsylvania 2013 Day-Trips



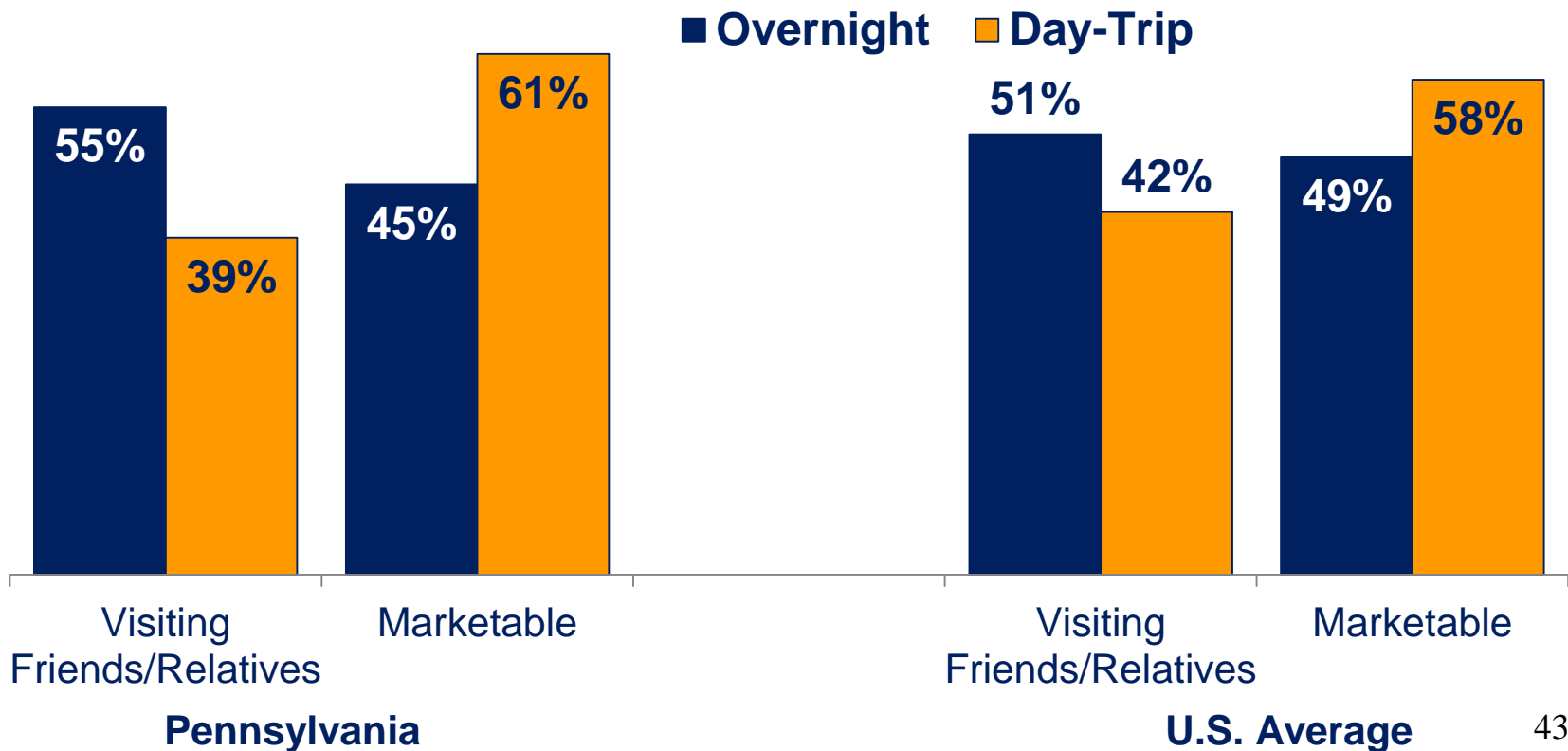
Base: Adult Day Trips



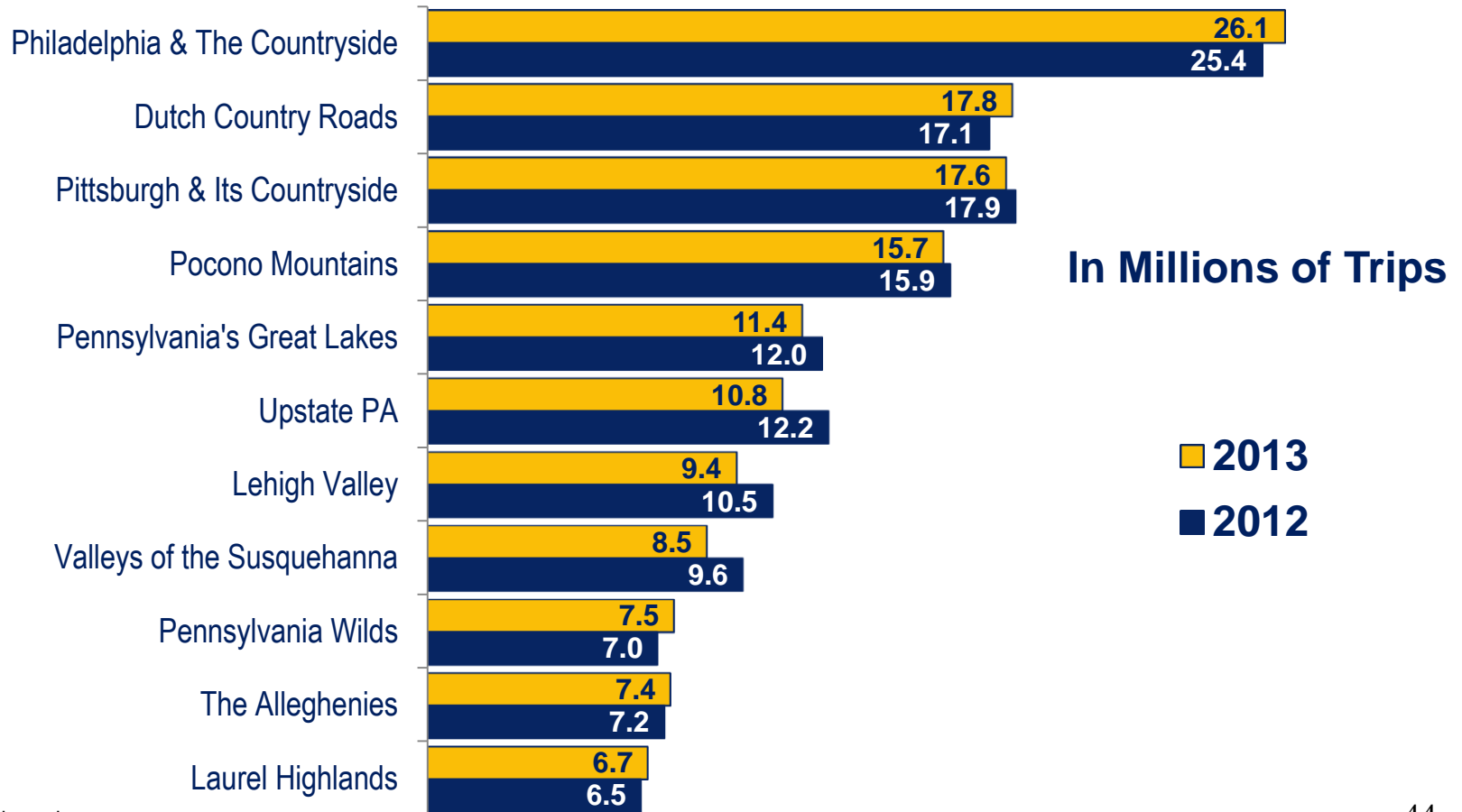
Pennsylvania and U.S. 2013 Leisure Travel Purpose of Stay Overnight vs. Day-trip



PA's day-trip leisure travelers were more likely to visit the state on marketable trips than the state's overnight travelers and U.S. travelers, on average.



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

2013 Marketable Overnight Trips

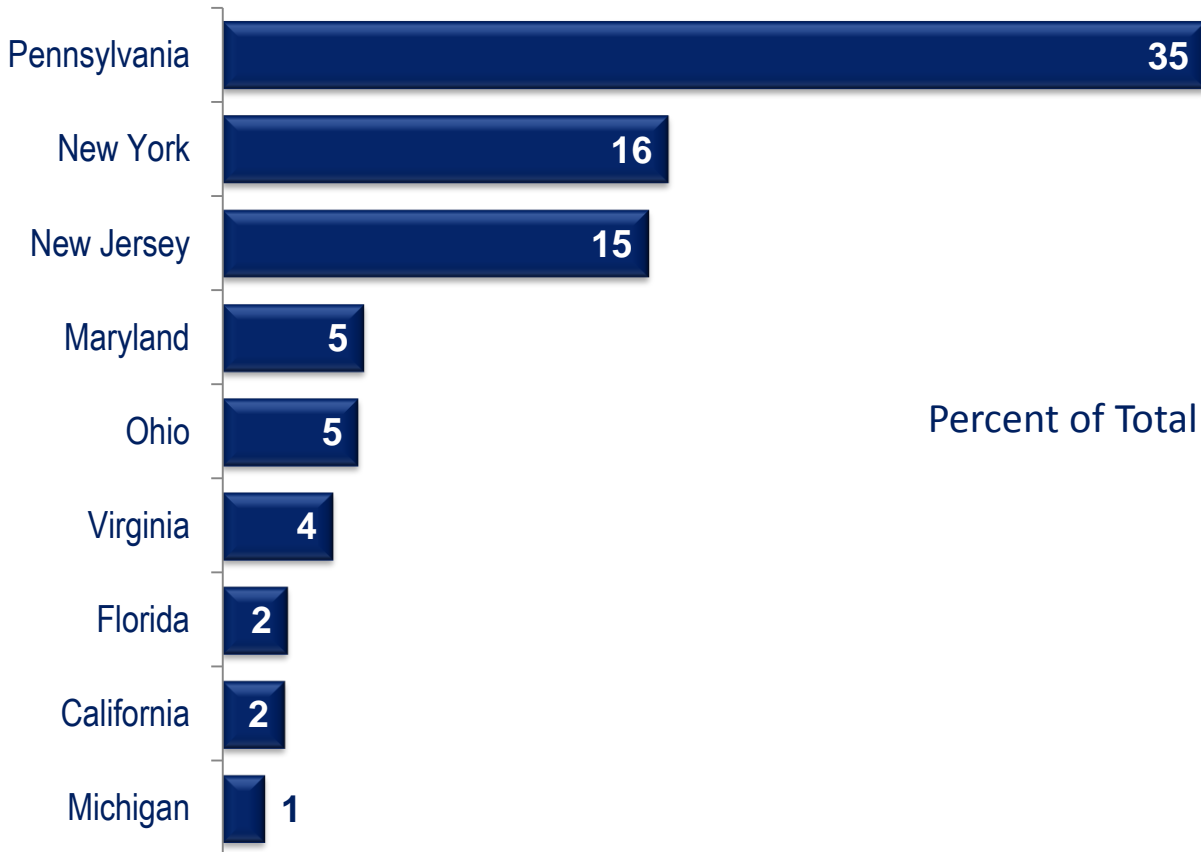
- Main Origin Markets**
- Demographic Profile**
- Trip Planning & Booking**
- Trip Characteristics/Experiences**

Origin Markets for Pennsylvania Marketable Overnight Trips

Main Origin States for Pennsylvania's Marketable Overnight Travelers



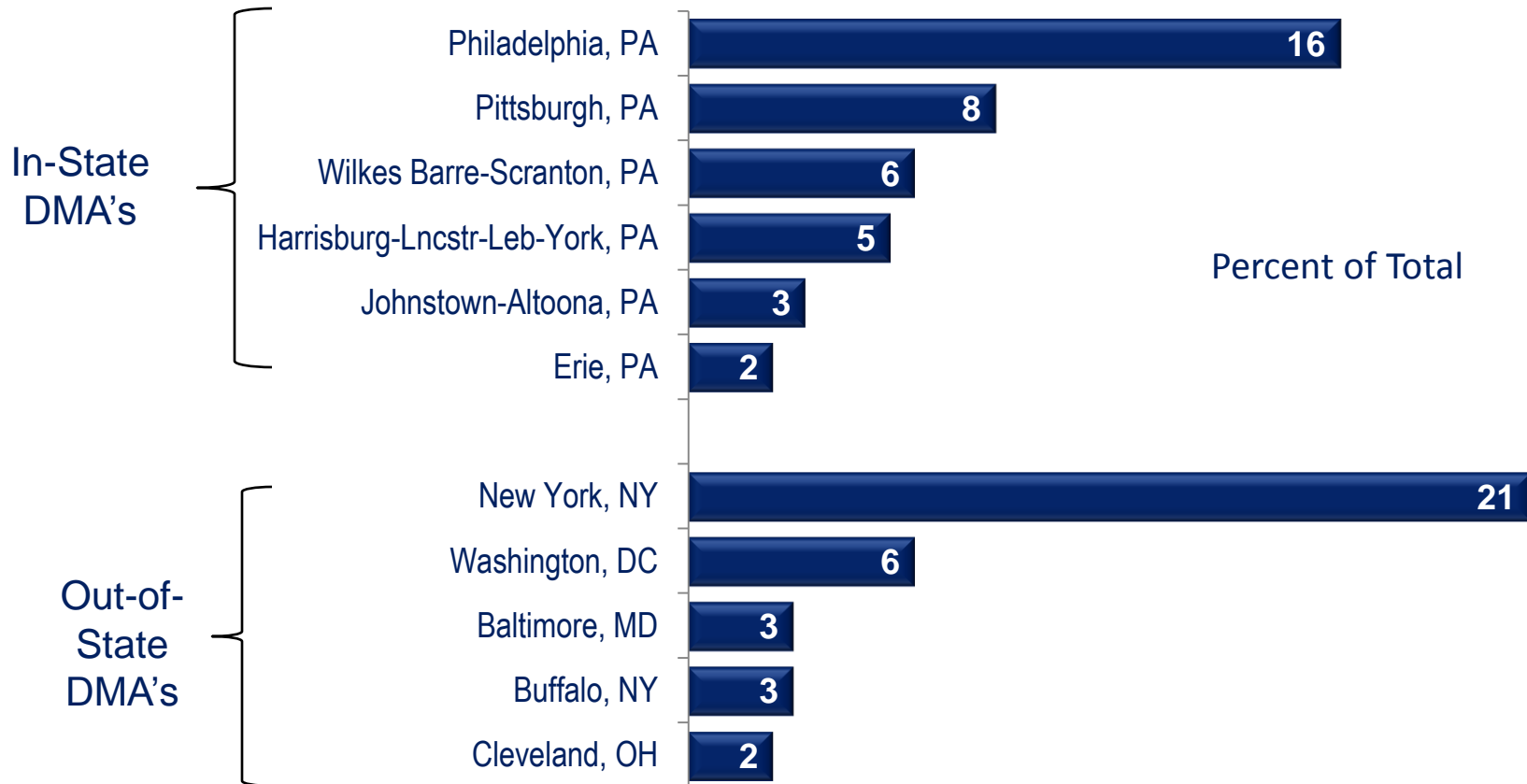
Base: Marketable Overnight Trips



Main Urban Markets for Pennsylvania's Marketable Overnight Travelers



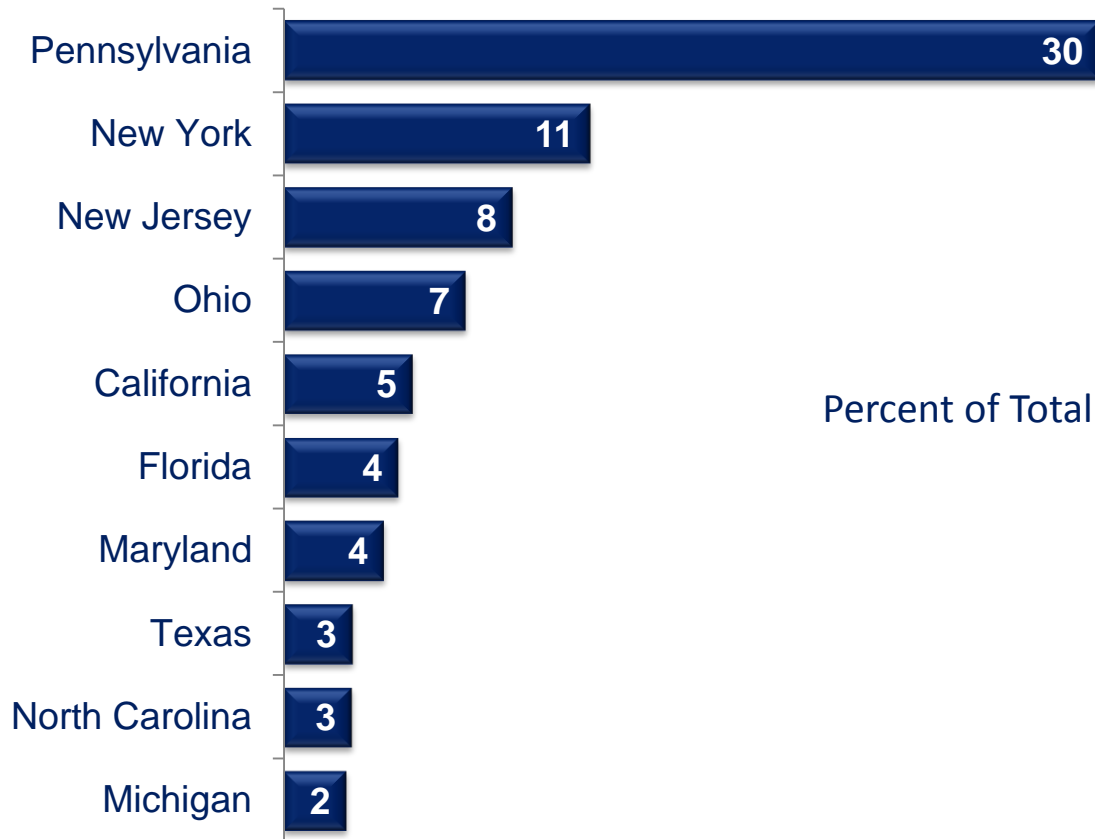
Base: Marketable Overnight Trips



Main Origin States for Pennsylvania's Business Overnight Travelers



Base: Business Overnight Trips



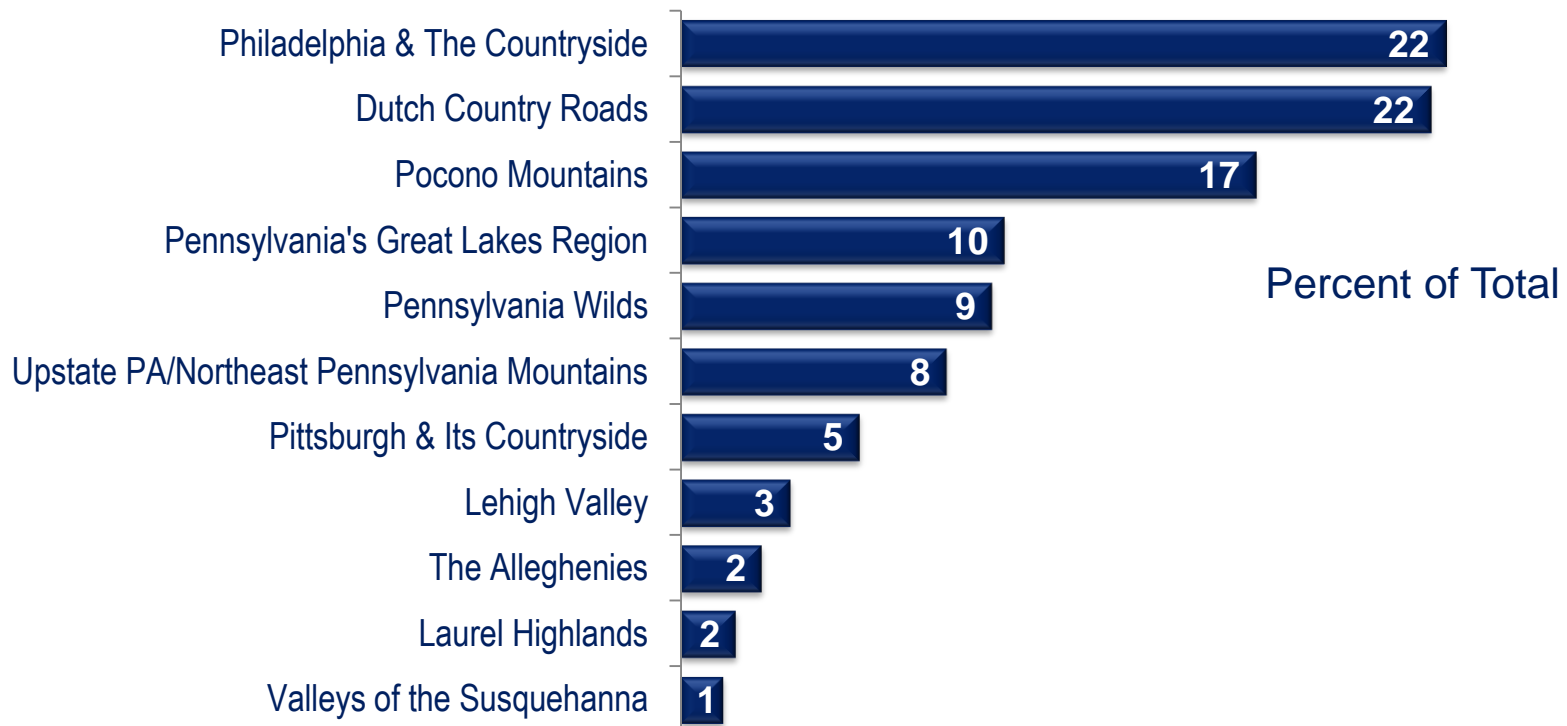
PA Tourism Regions Visited by Travelers' State of Residence

Pennsylvania Tourism Regions Visited by New York Residents



Base: Marketable Overnight Trips

In a change from prior years, Philadelphia and The Countryside and the Dutch Country Roads regions were the top destinations for travelers from New York.

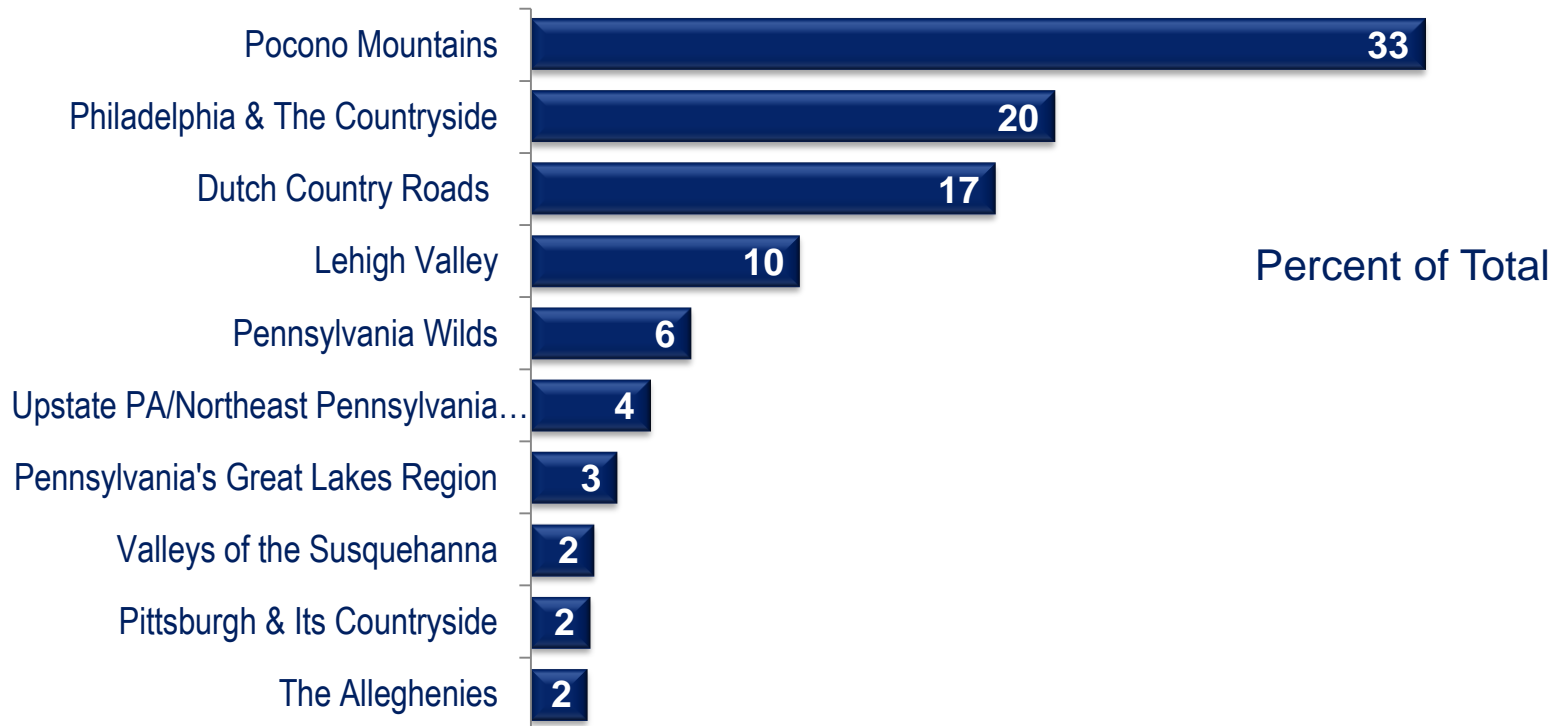


Pennsylvania Tourism Regions Visited by New Jersey Residents



Base: Marketable Overnight Trips

The Pocono Mountains remained the most popular PA destination for marketable overnight travelers from New Jersey in 2013, followed by the Philadelphia & the Countryside.

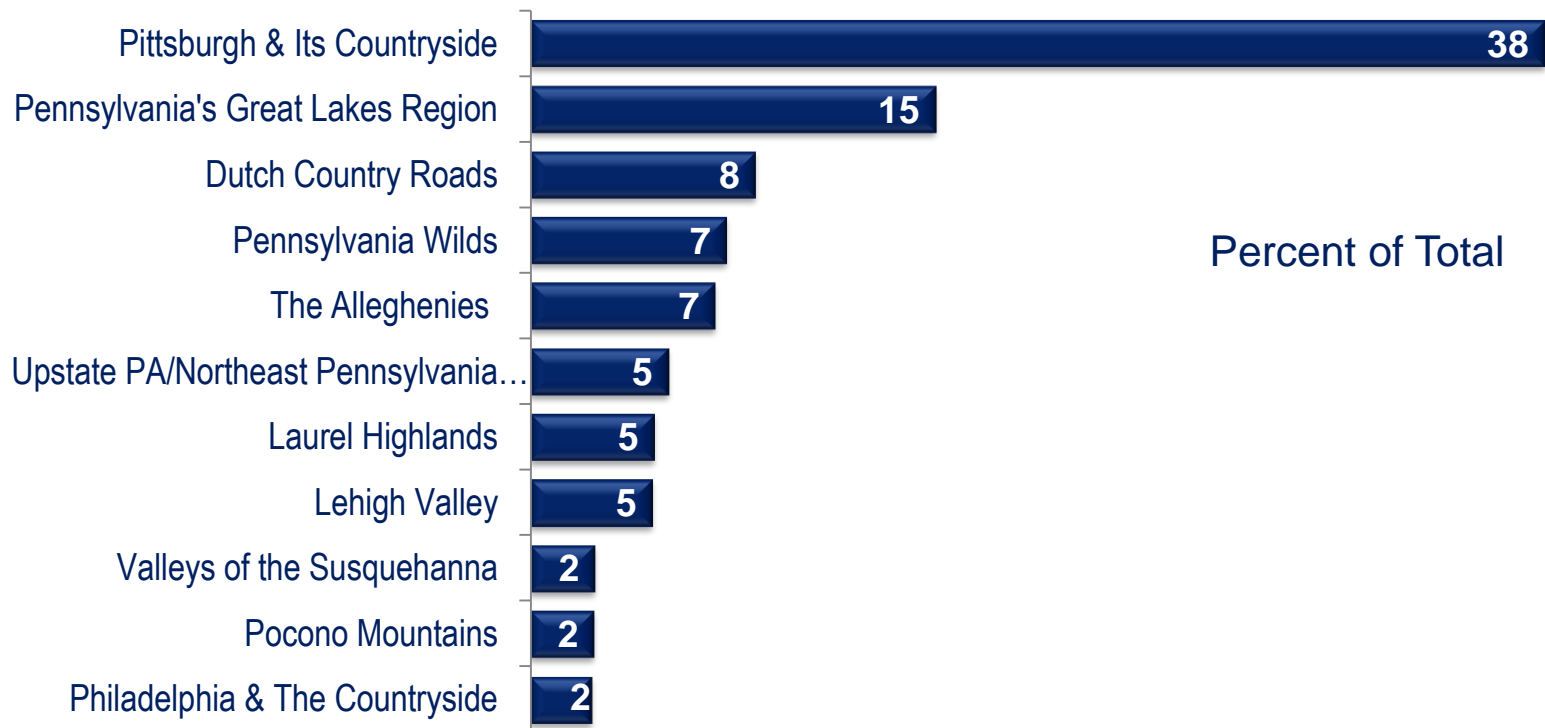


Pennsylvania Tourism Regions Visited by Ohio Residents



Base: Marketable Overnight Trips

Pittsburgh & Its Countryside region remained the most popular PA destination for marketable overnight travelers from Ohio in 2013, followed by Pennsylvania's Great Lakes.



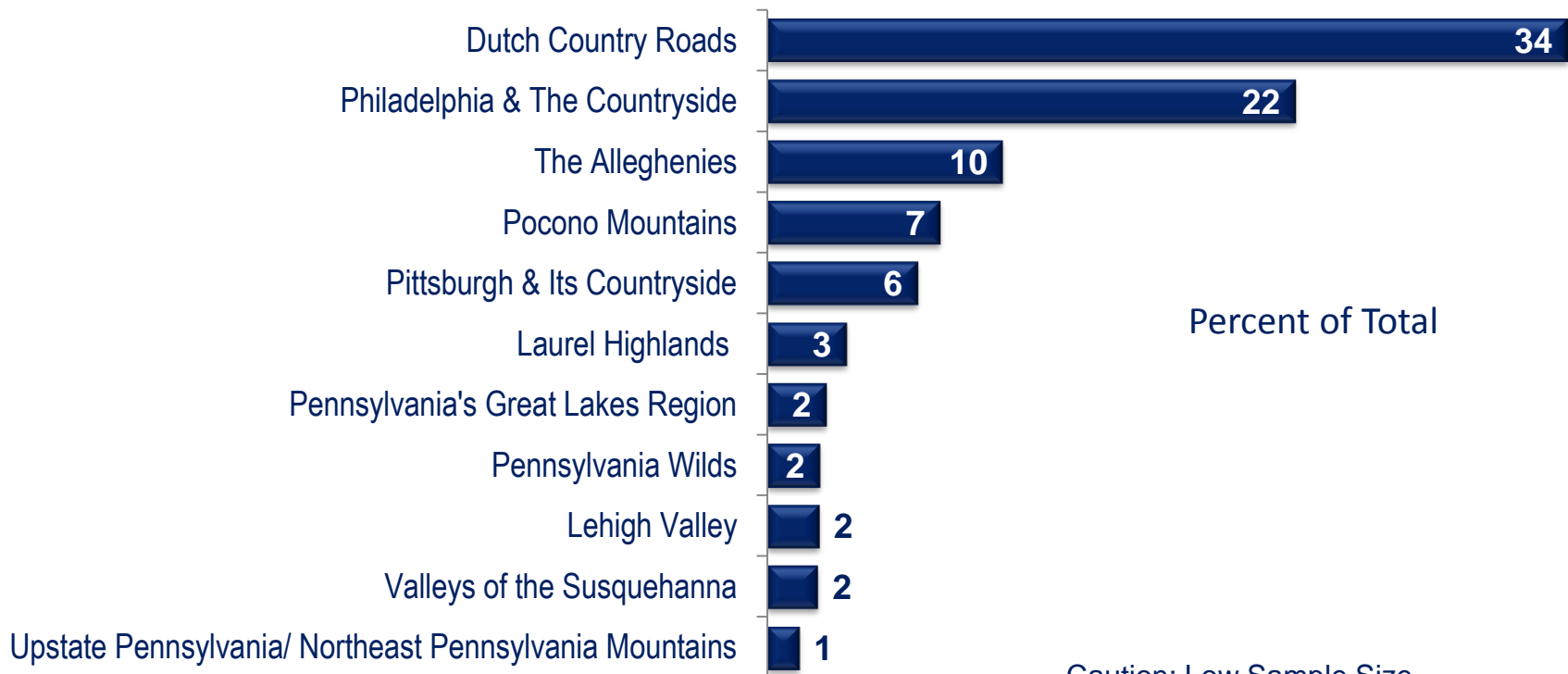
Caution – Low Sample Size

Pennsylvania Tourism Regions Visited by Maryland Residents



Base: Marketable Overnight Trips

The Dutch Country Roads region remained the most popular PA destination for marketable overnight travelers from Maryland in 2013.



Caution: Low Sample Size

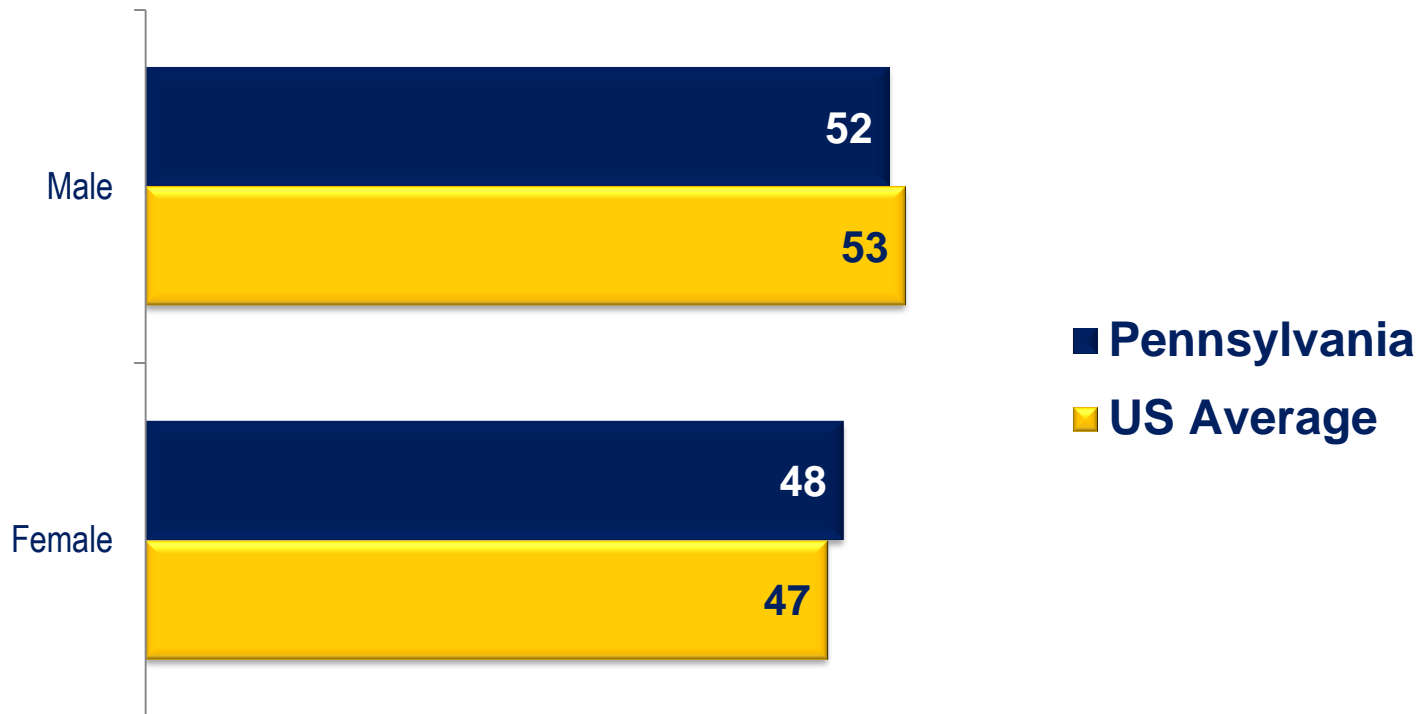
Traveler Profile — Marketable Overnight Trips

Gender



Base: Marketable Overnight Trips

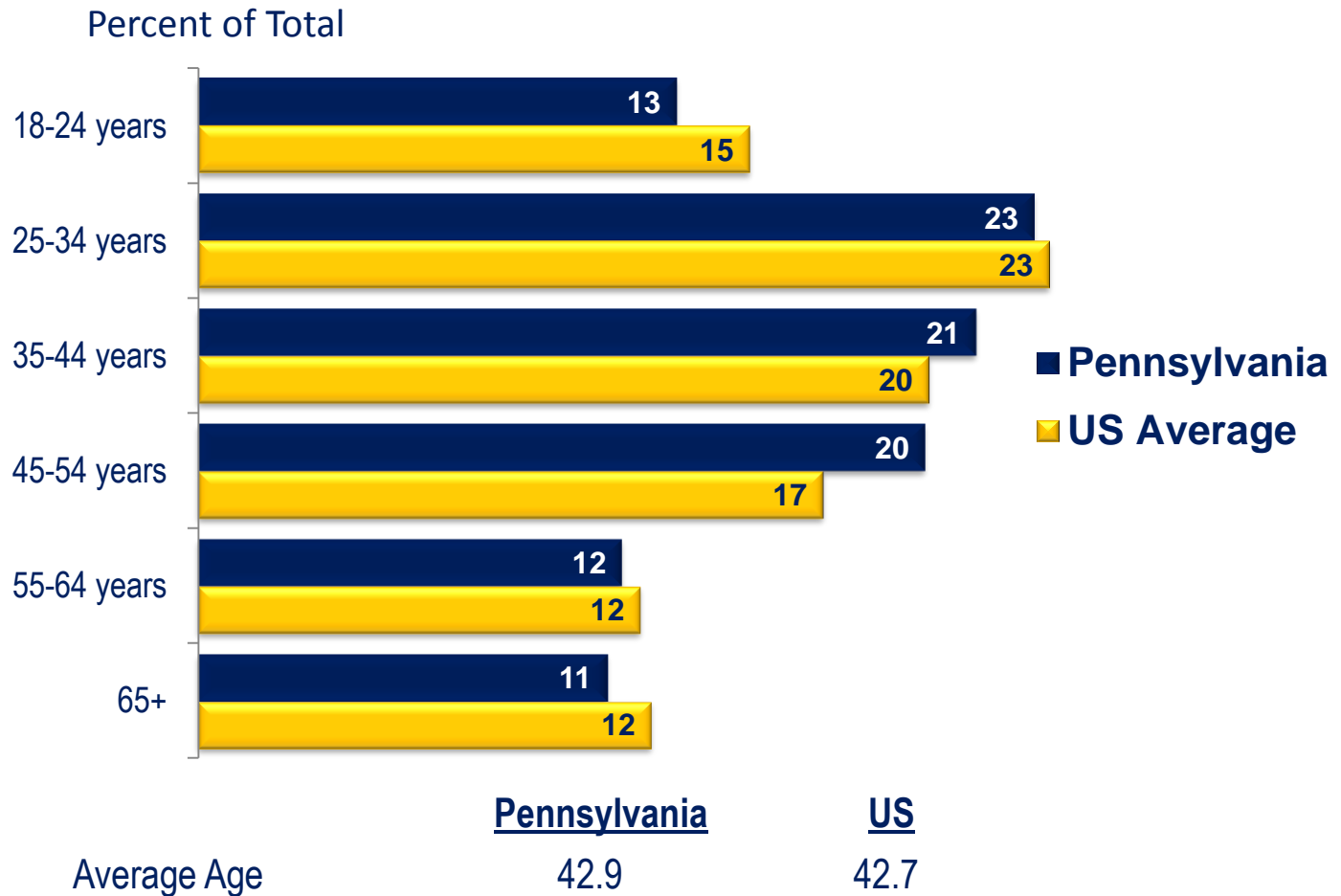
Percent of Total



Age



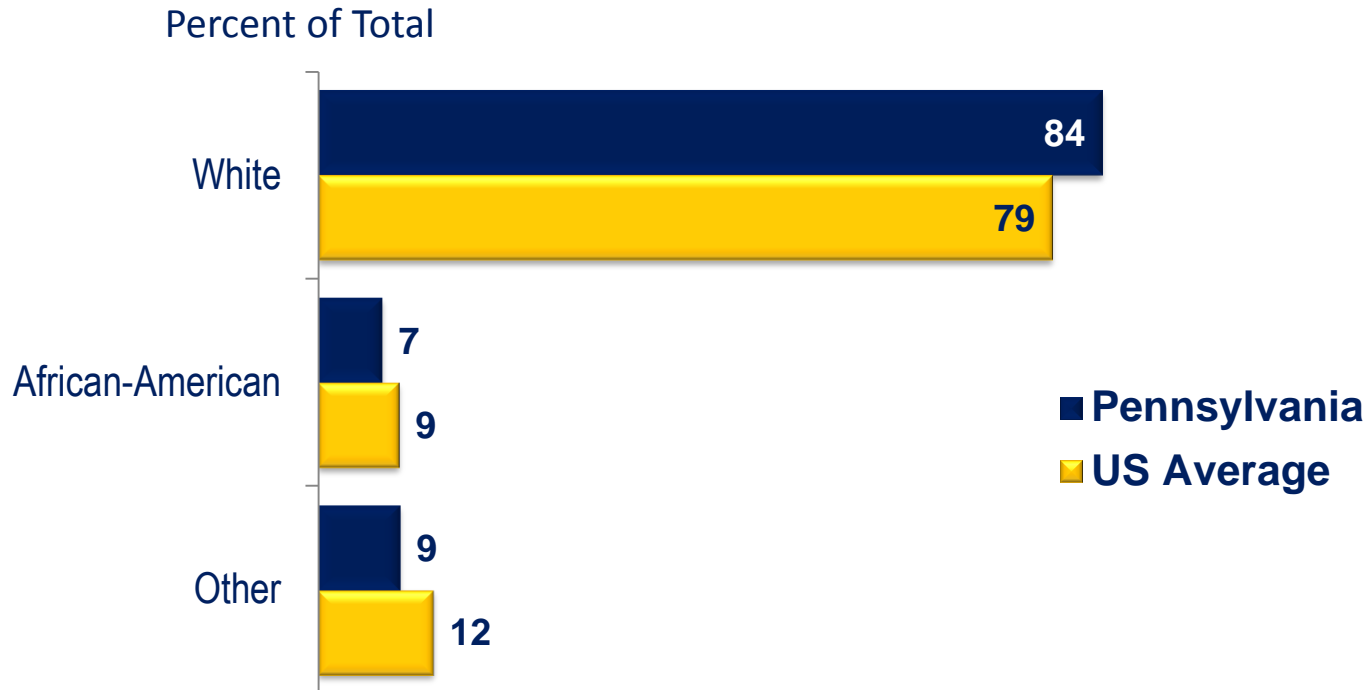
Base: Marketable Overnight Trips



Race



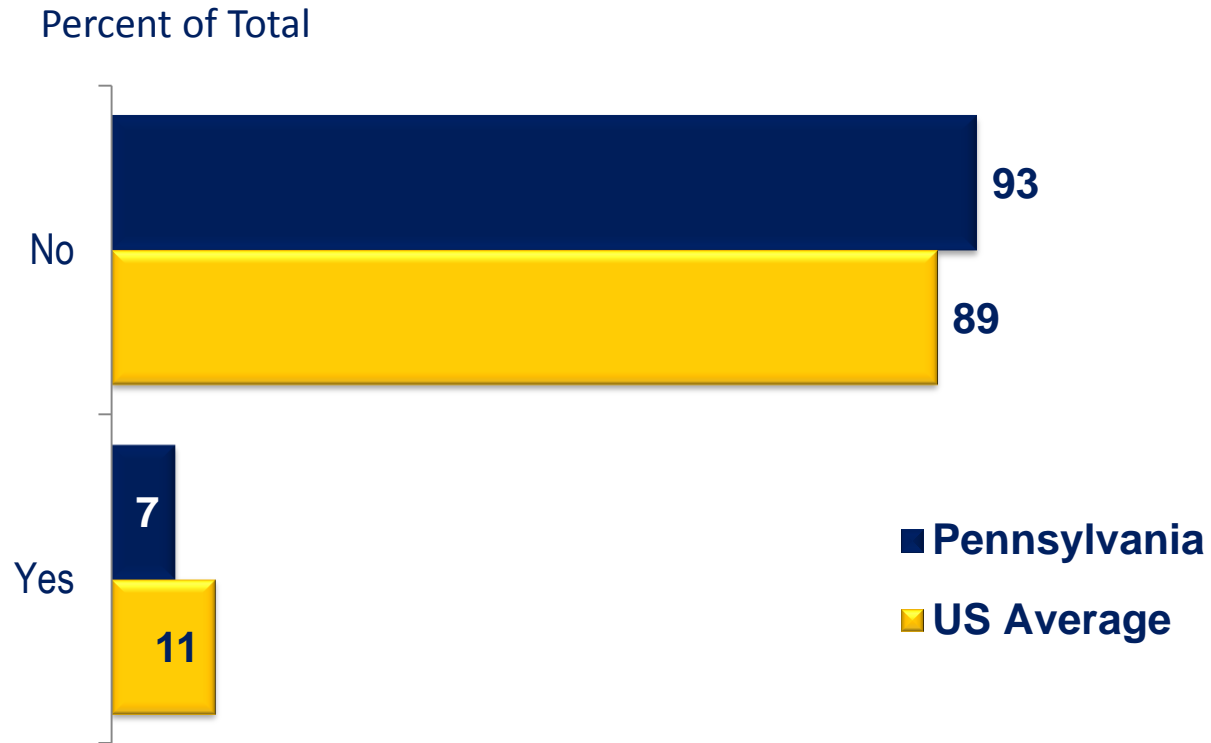
Base: Marketable Overnight Trips



Hispanic Background



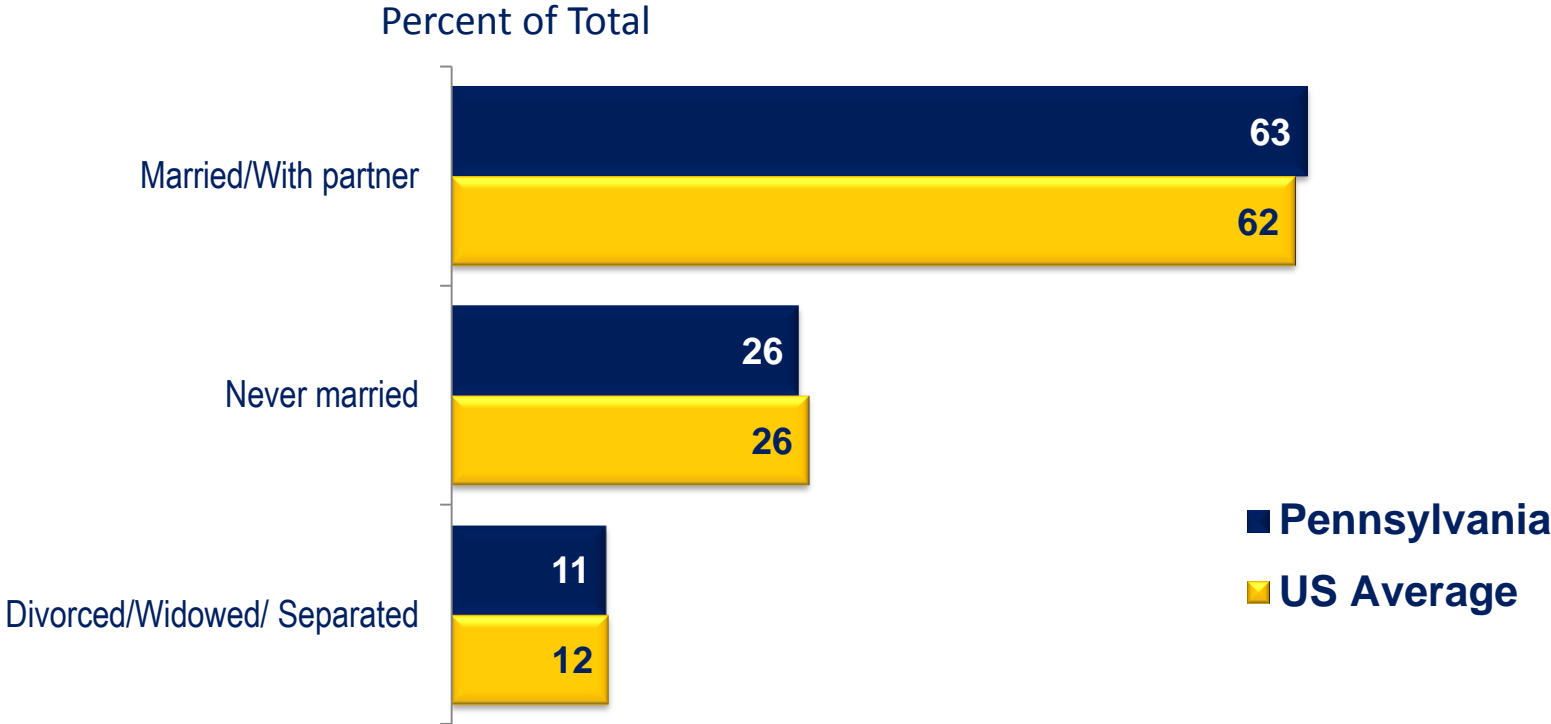
Base: Marketable Overnight Trips



Marital Status



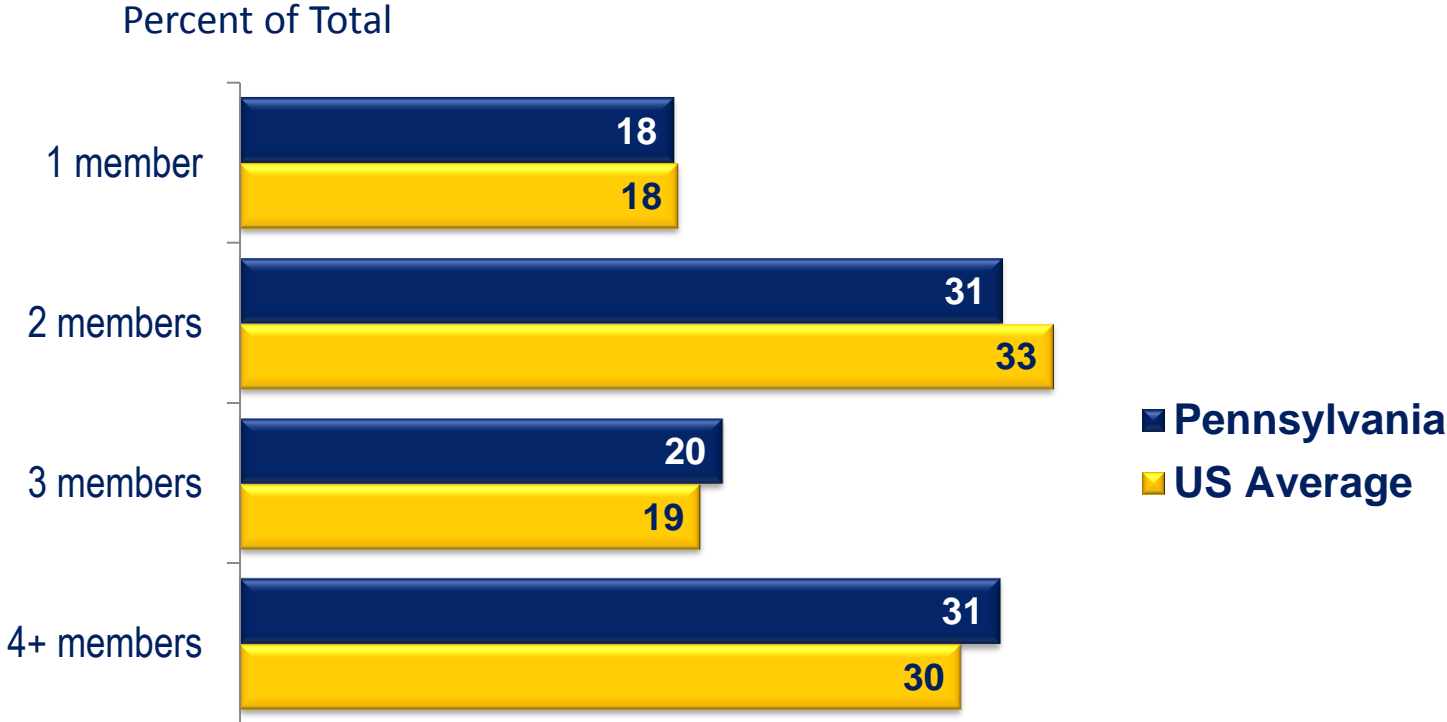
Base: Marketable Overnight Trips



Household Size



Base: Marketable Overnight Trips



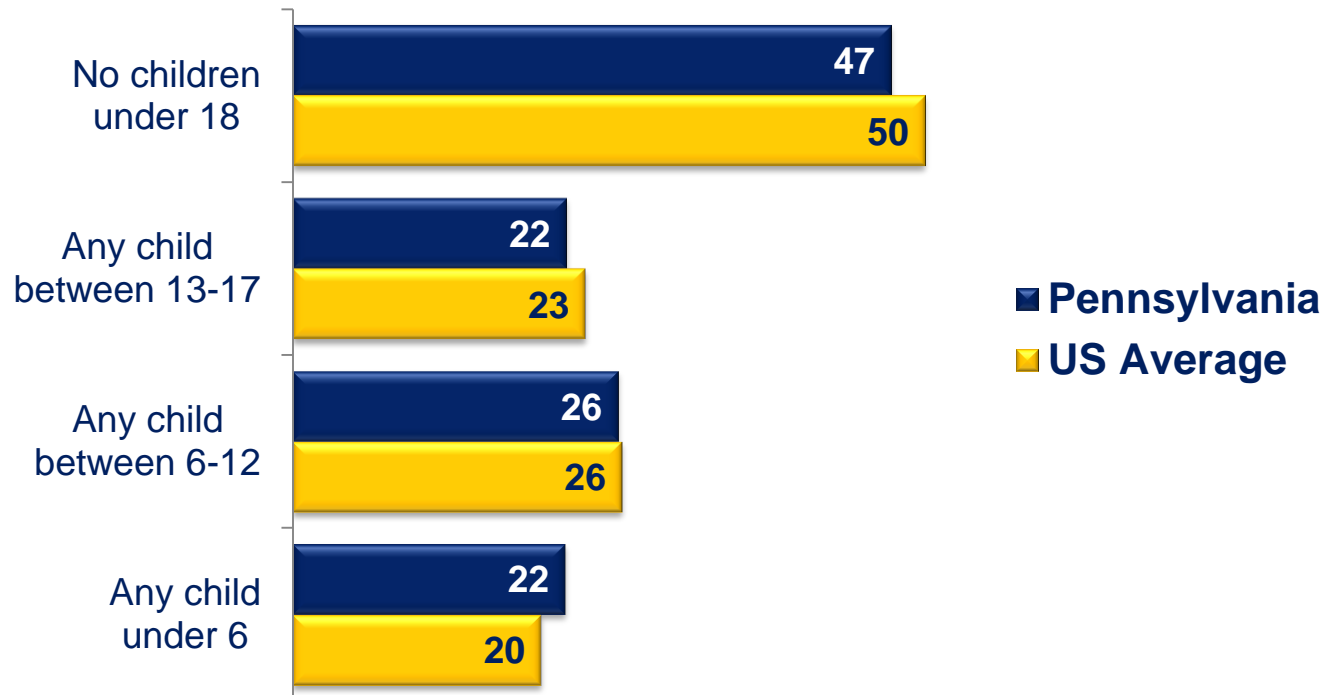
Average Household Size: Pennsylvania 3.0 United States 3.0

Presence of Children in Household



Base: Marketable Overnight Trips

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

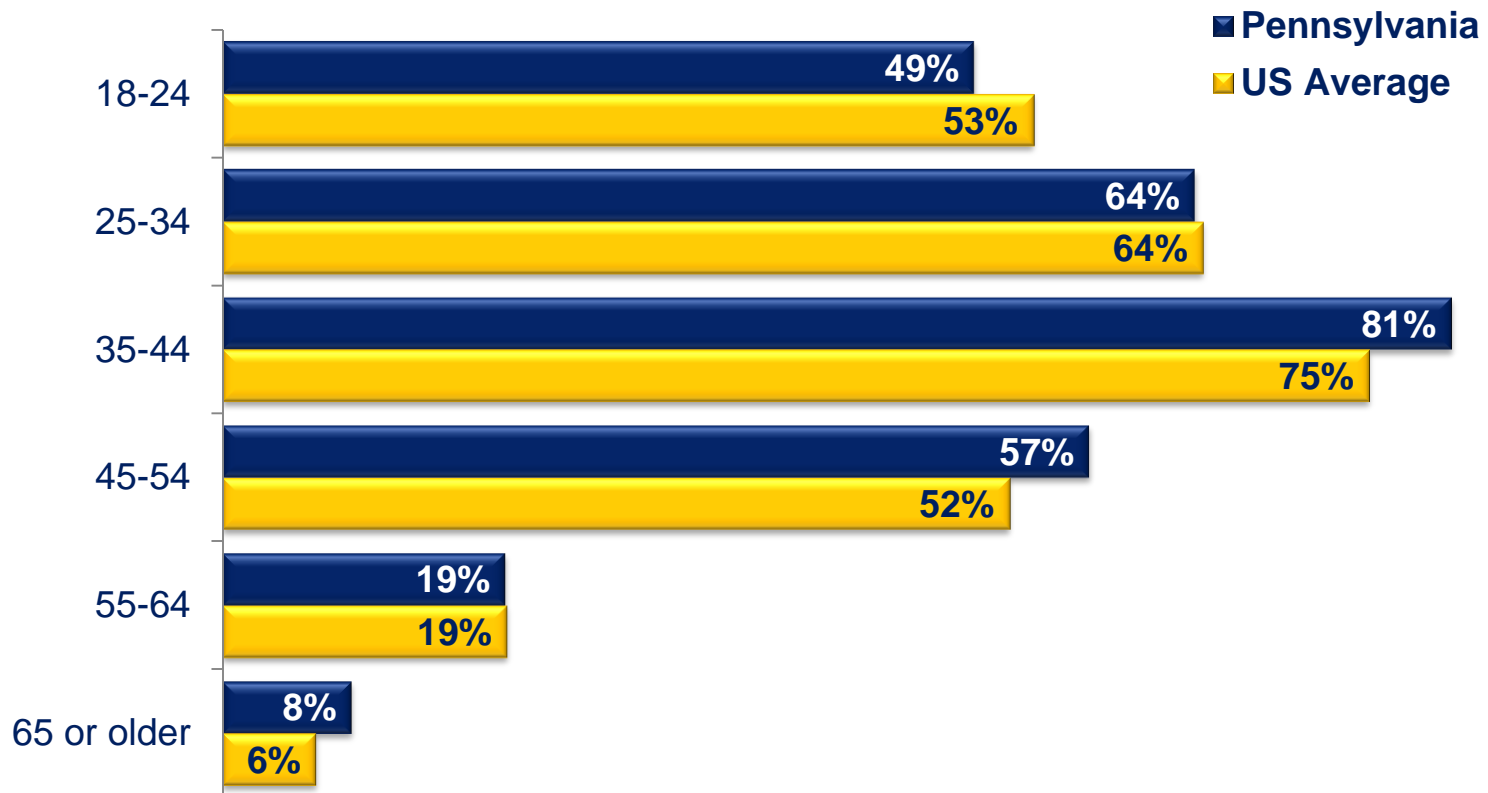


Presence of Children in Household by Age of Adult Traveler



Base: Marketable Overnight Trips

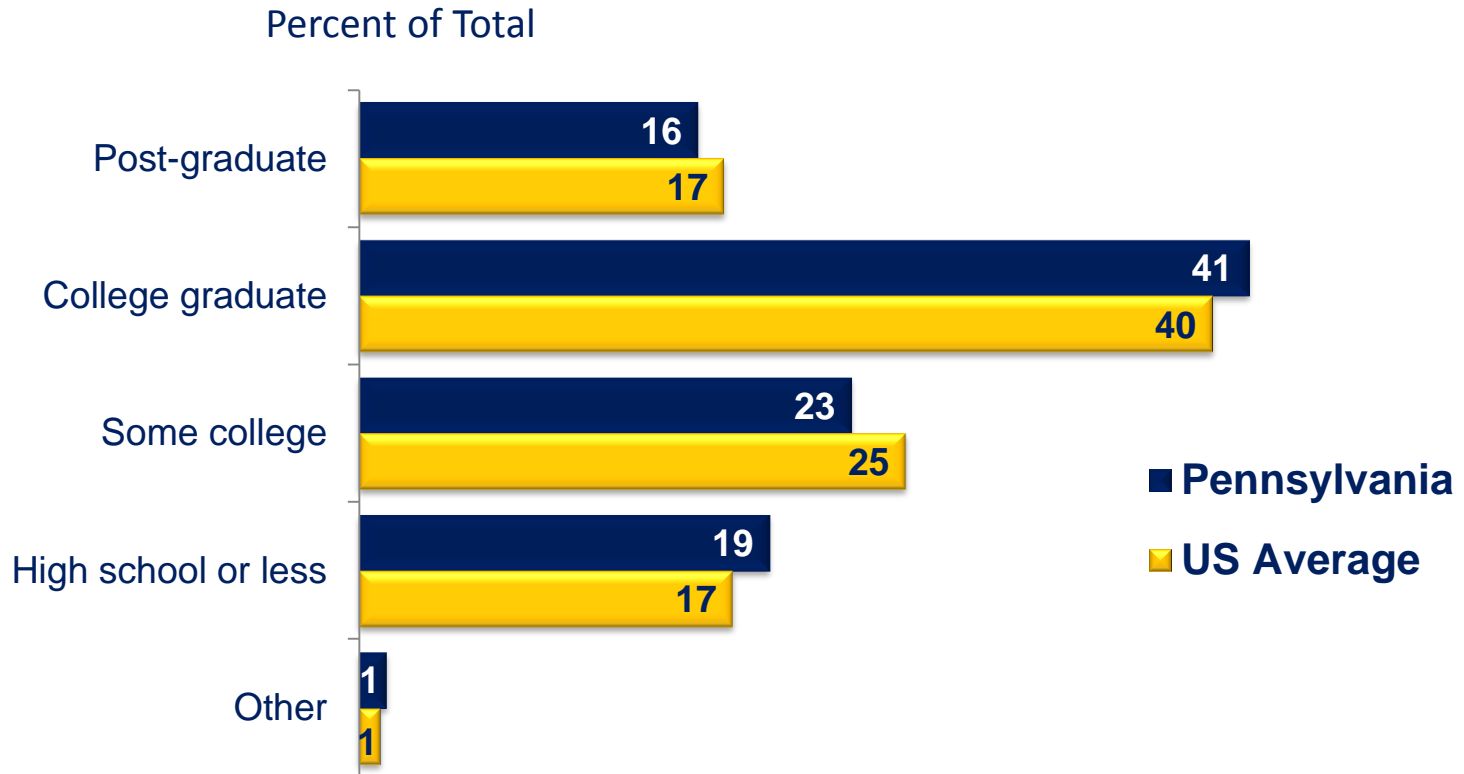
Percent of Adult Travelers with Children Under Age 18 Living at Home



Education



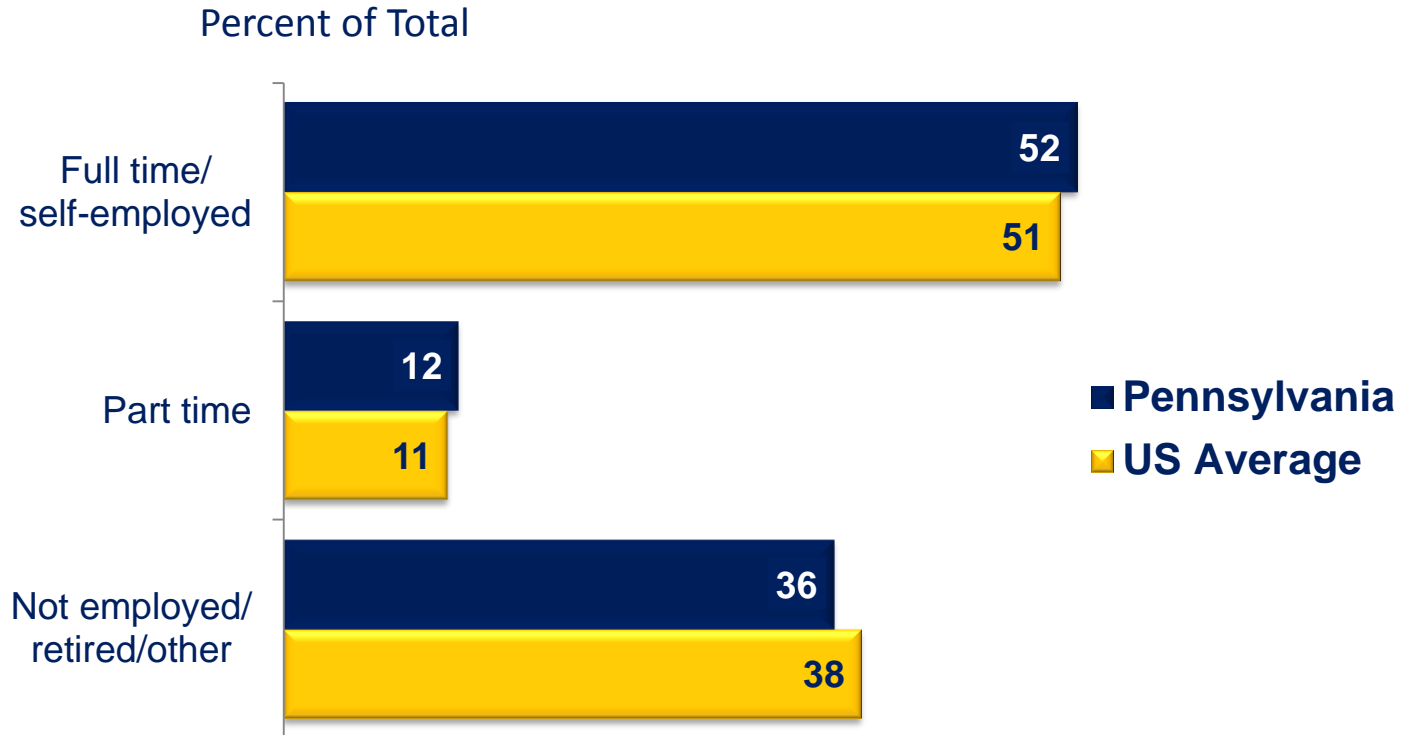
Base: Marketable Overnight Trips



Employment



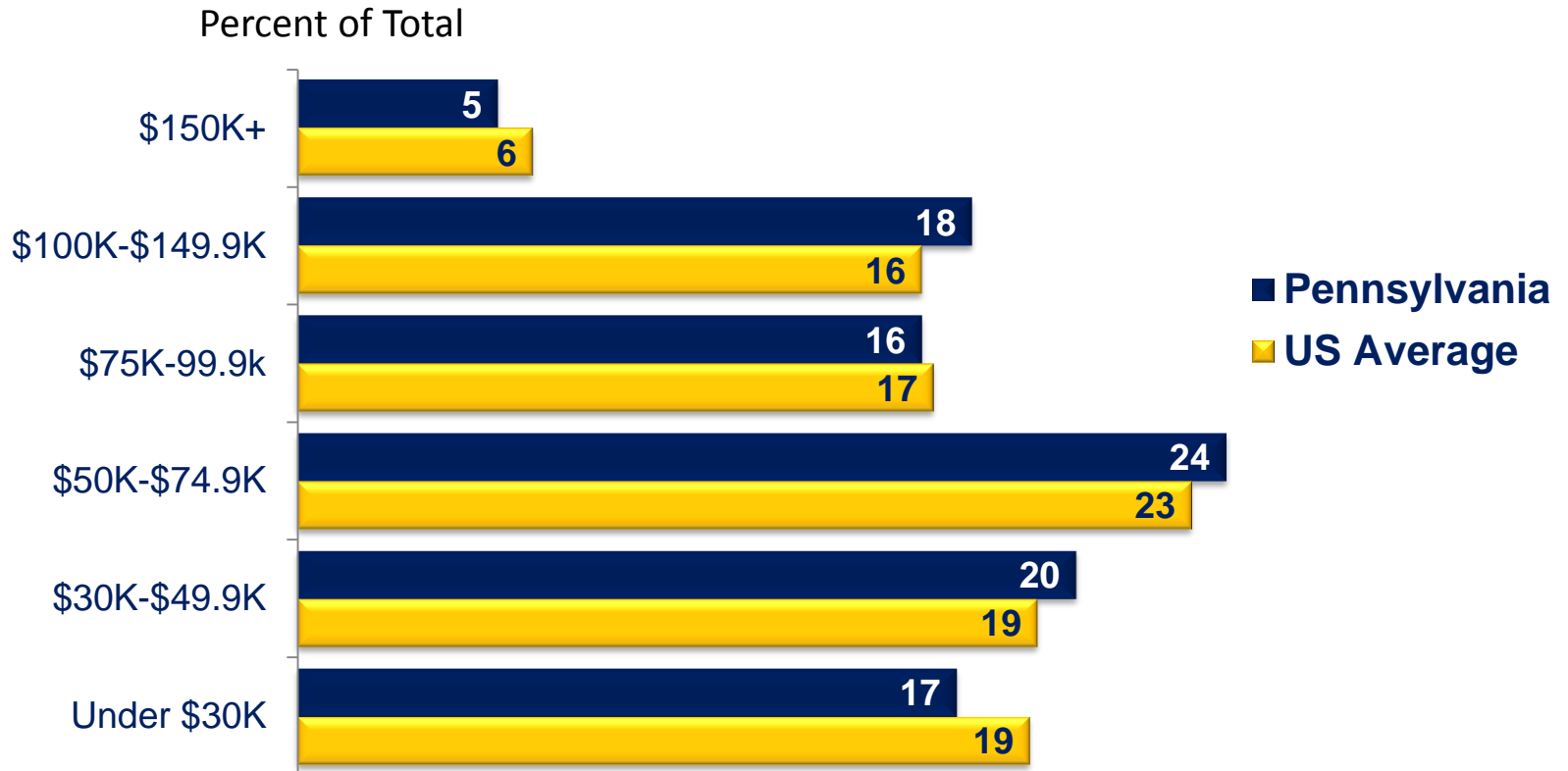
Base: Marketable Overnight Trips



Income



Base: Marketable Overnight Trips

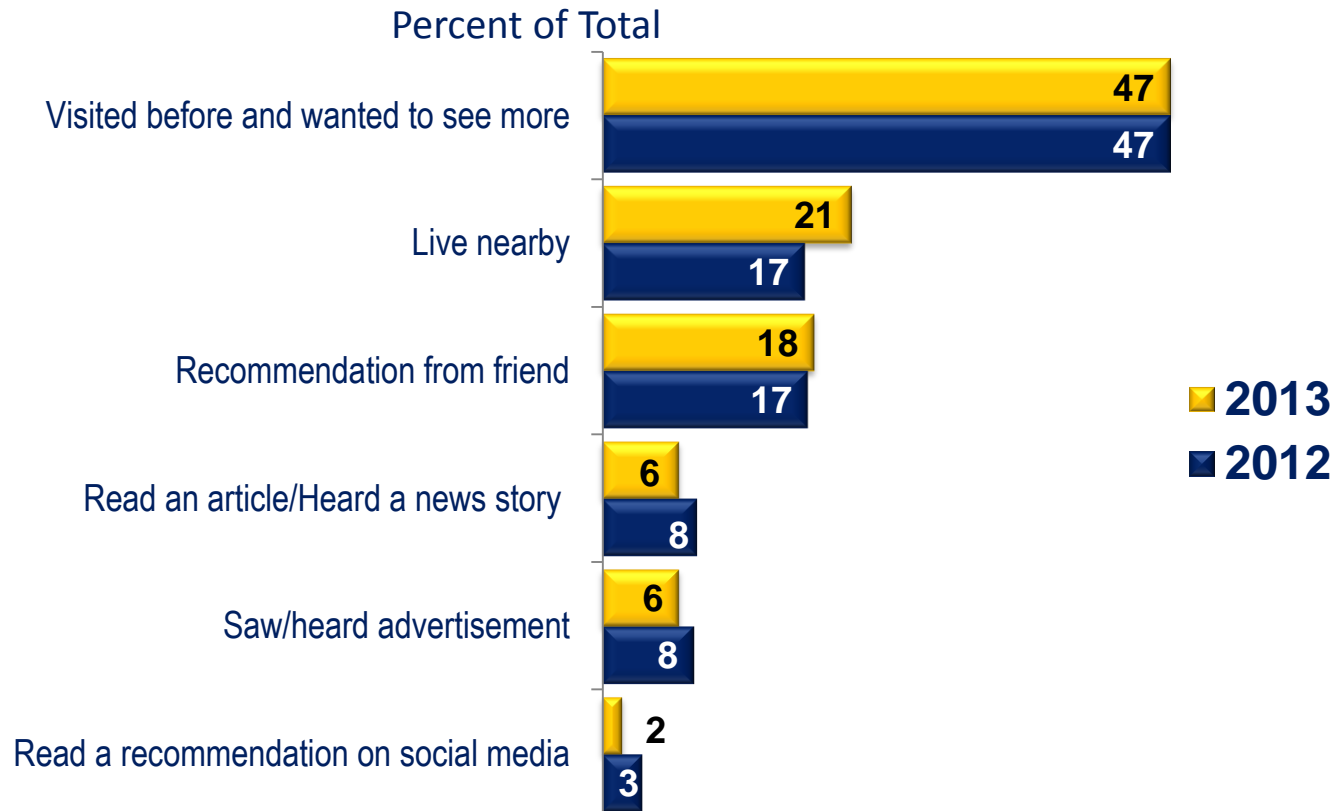


**Trip Planning & Booking
Pennsylvania
Marketable Overnight Trips**

Main Reason for Choosing Pennsylvania



Base: Marketable Overnight Trips



Planning Cycle



Base: Marketable Overnight Trips

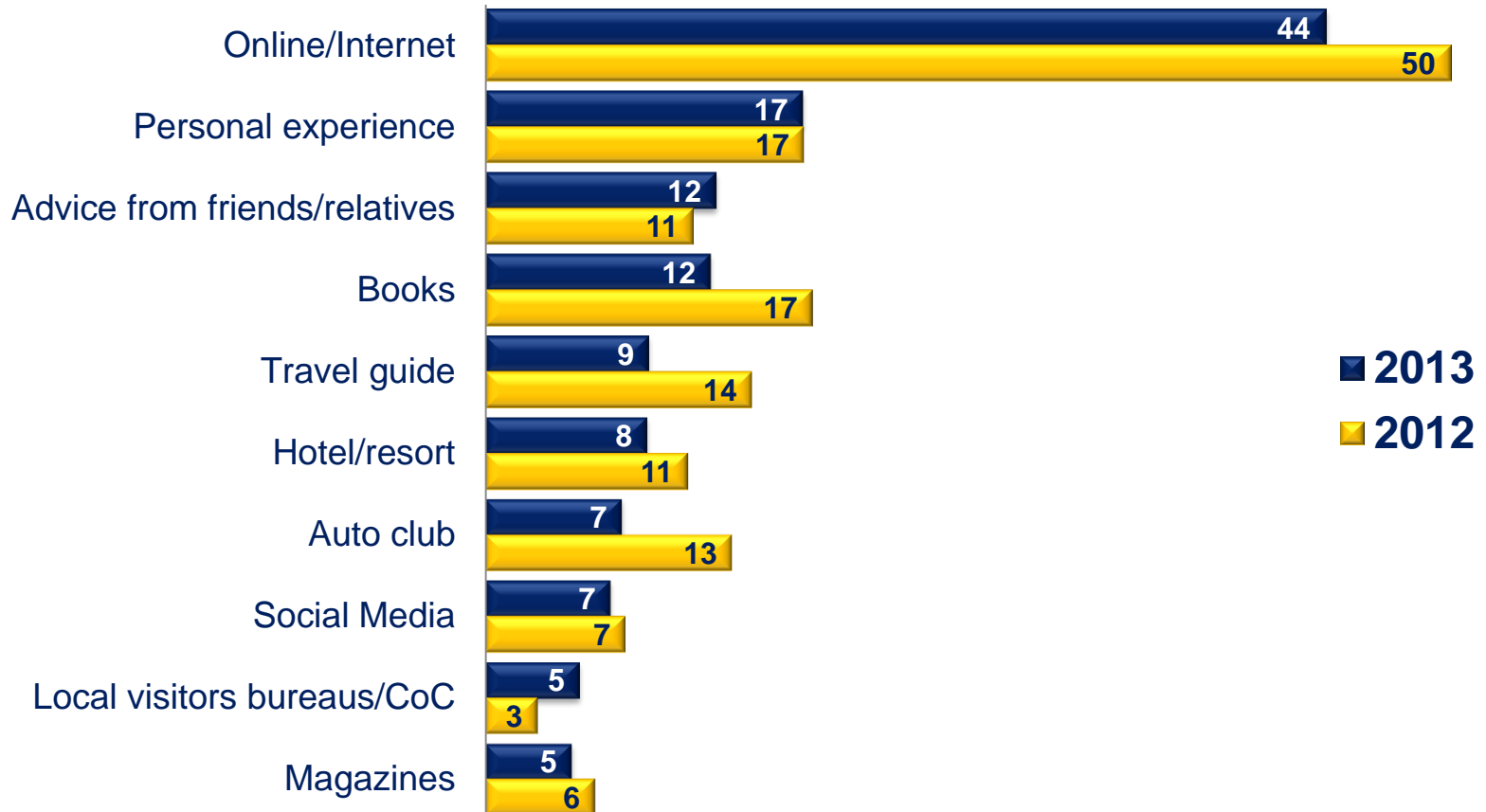


Information Sources Used for Planning the Trip



Base: Marketable Overnight Trips

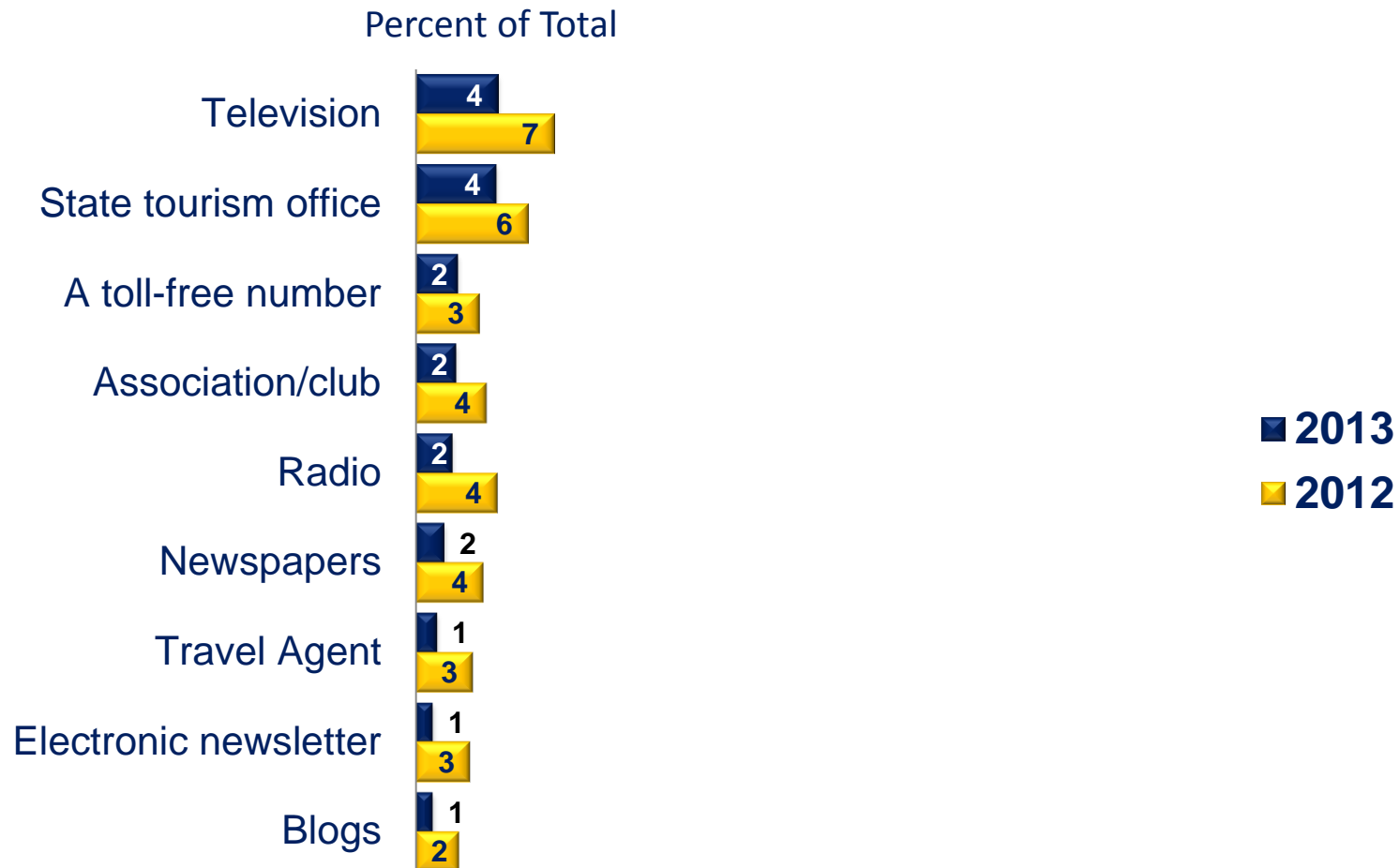
Percent of Total



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



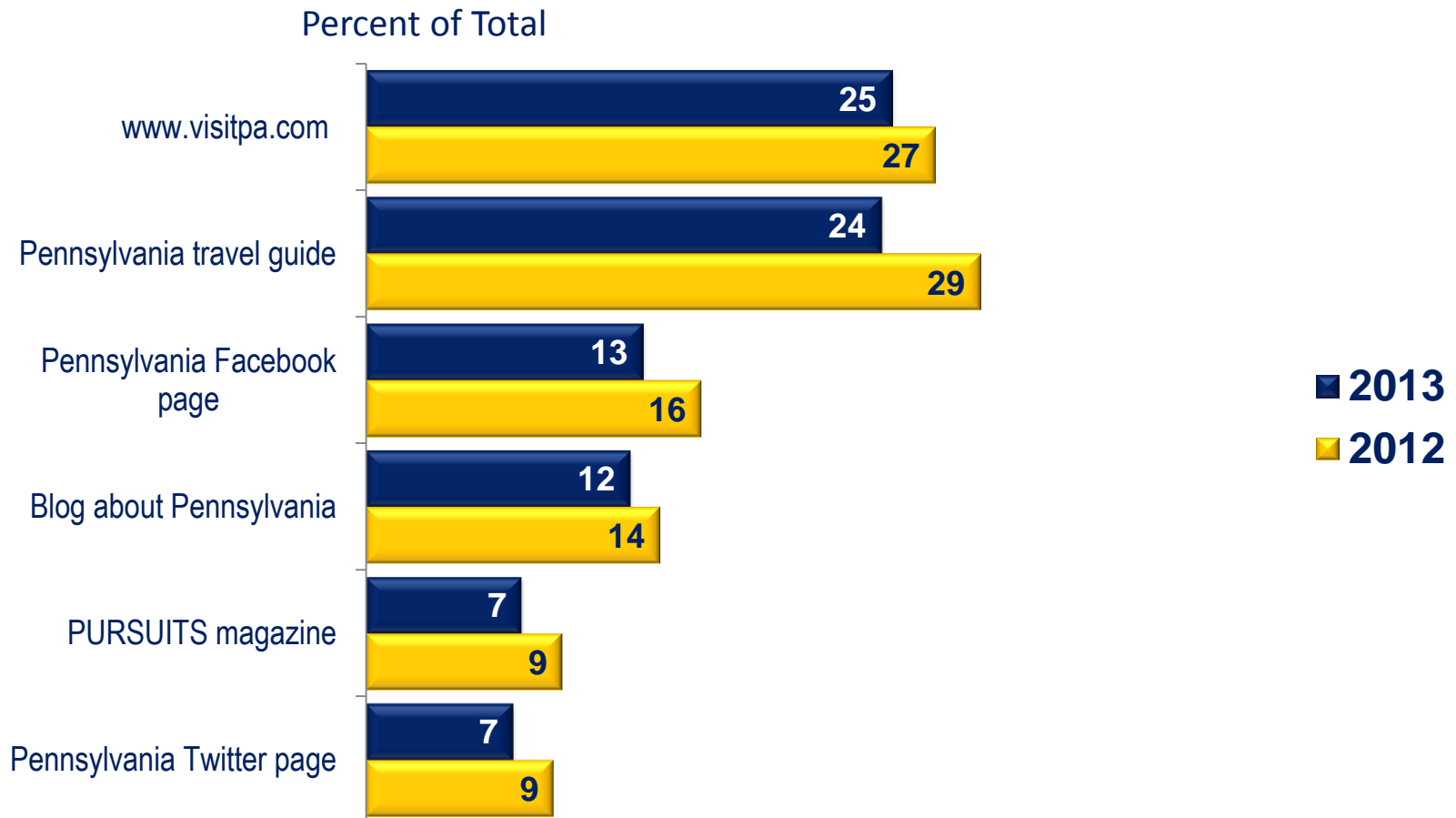
Base: Marketable Overnight Trips



Use of Pennsylvania Tourism Office Trip Planning Tools



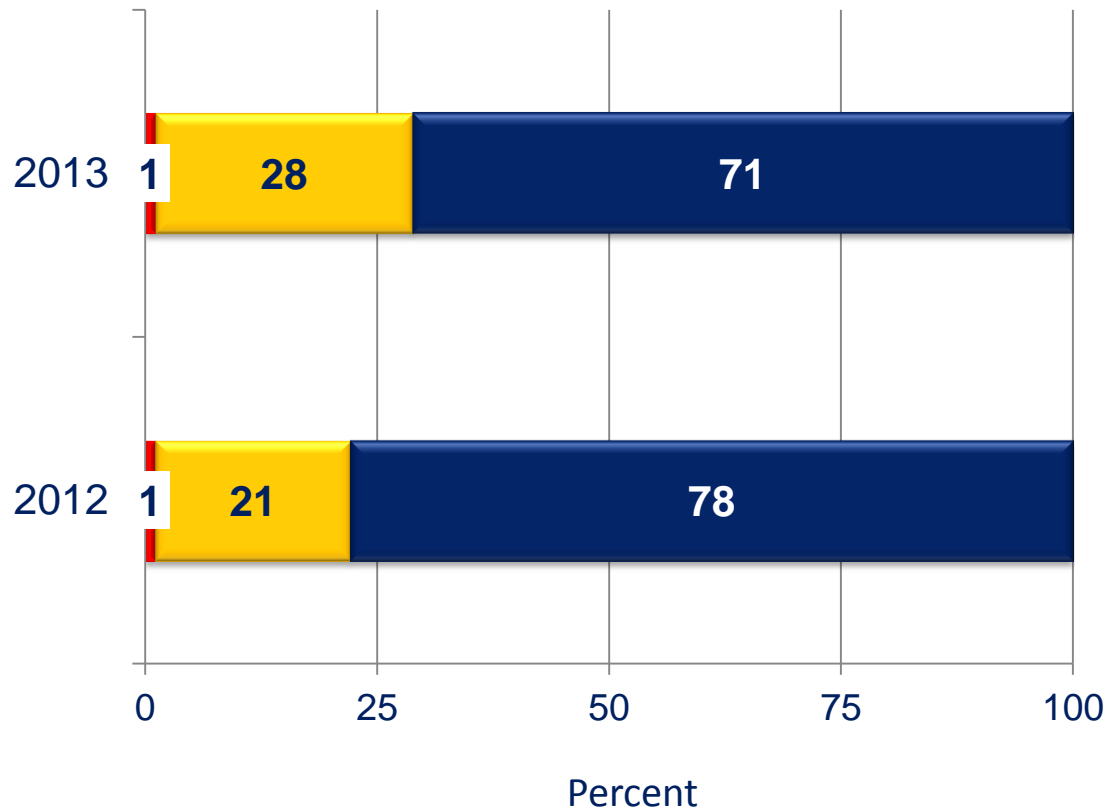
Base: Marketable Overnight Trips



www.visitpa.com Usefulness



Base: Marketable Overnight Trips



3-Pt. Scale: ■ Not Very Useful

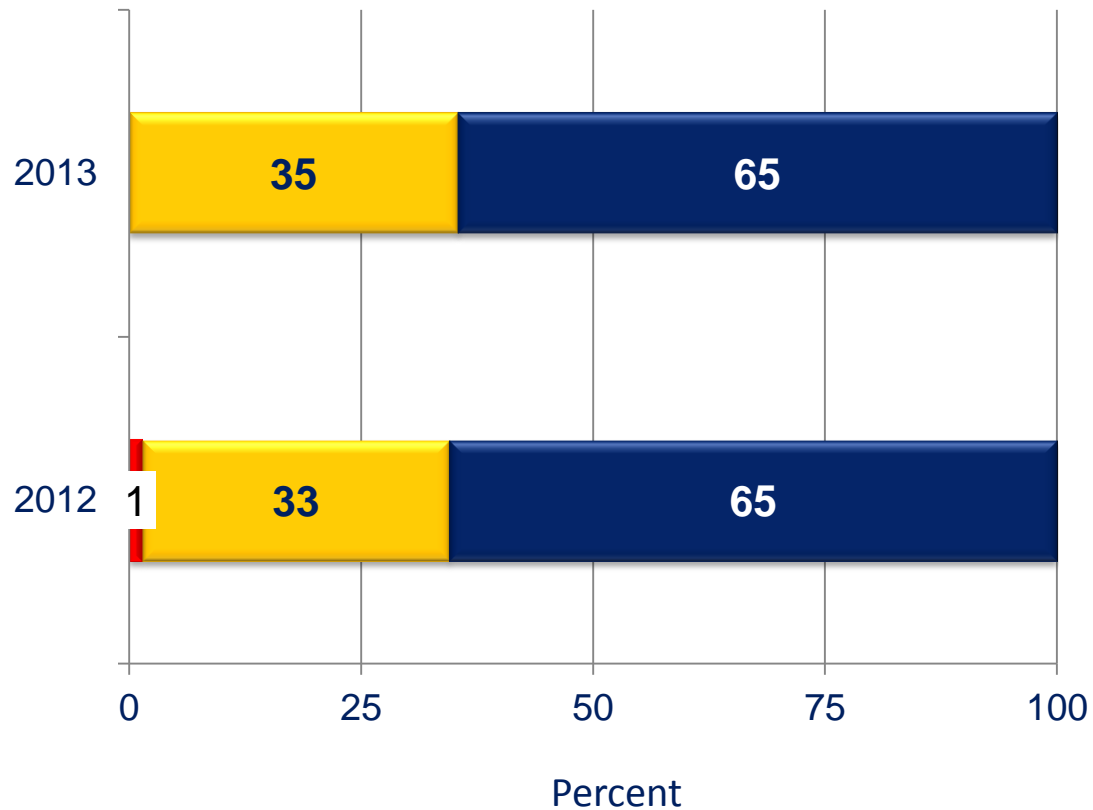
■ Somewhat Useful

■ Very Useful

Pennsylvania Travel Guide Usefulness



Base: Marketable Overnight Trips



3-Pt. Scale: ■ Not Very Useful

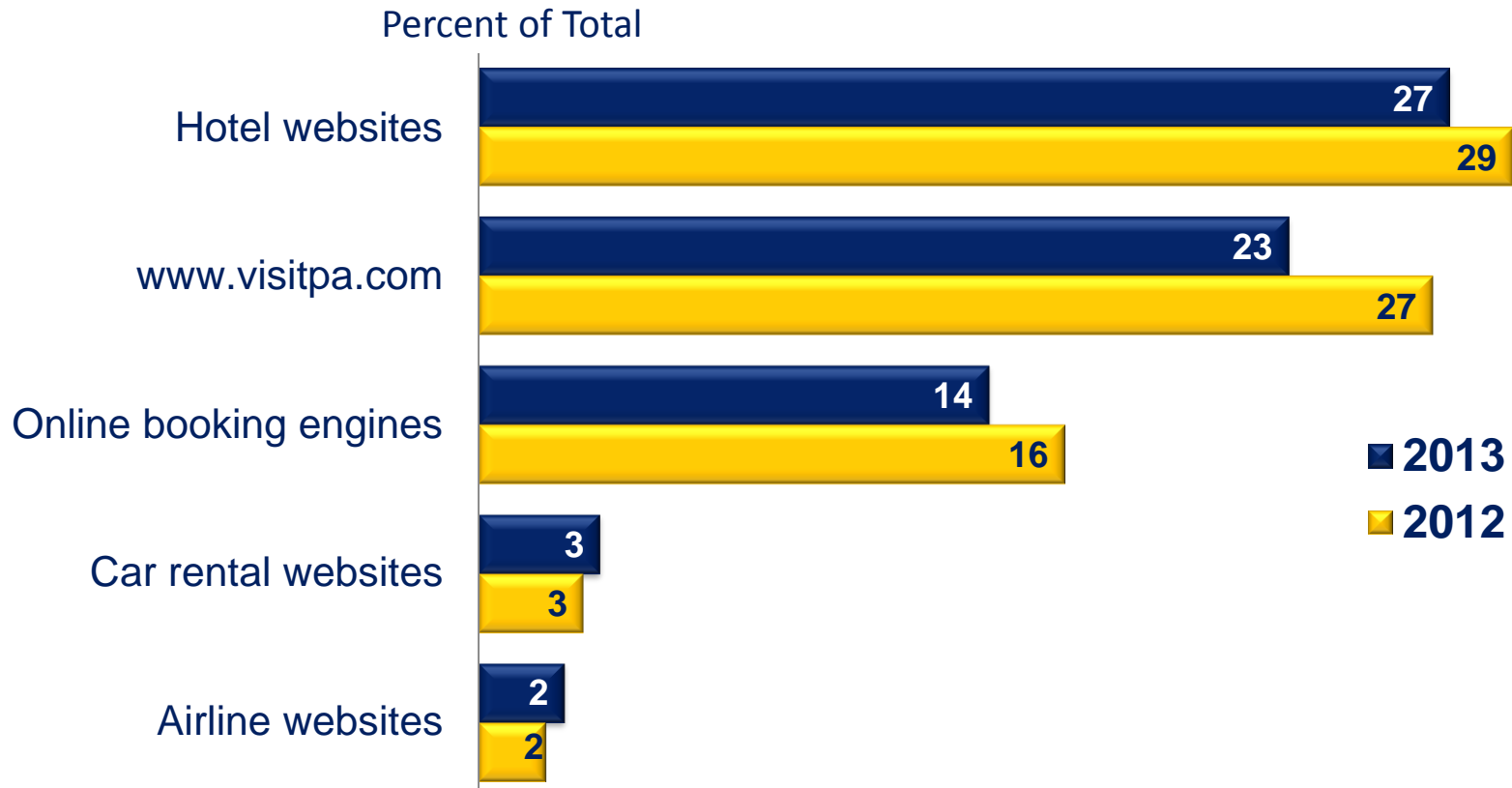
■ Somewhat Useful

■ Very Useful

Websites Used for Planning Pennsylvania Trip



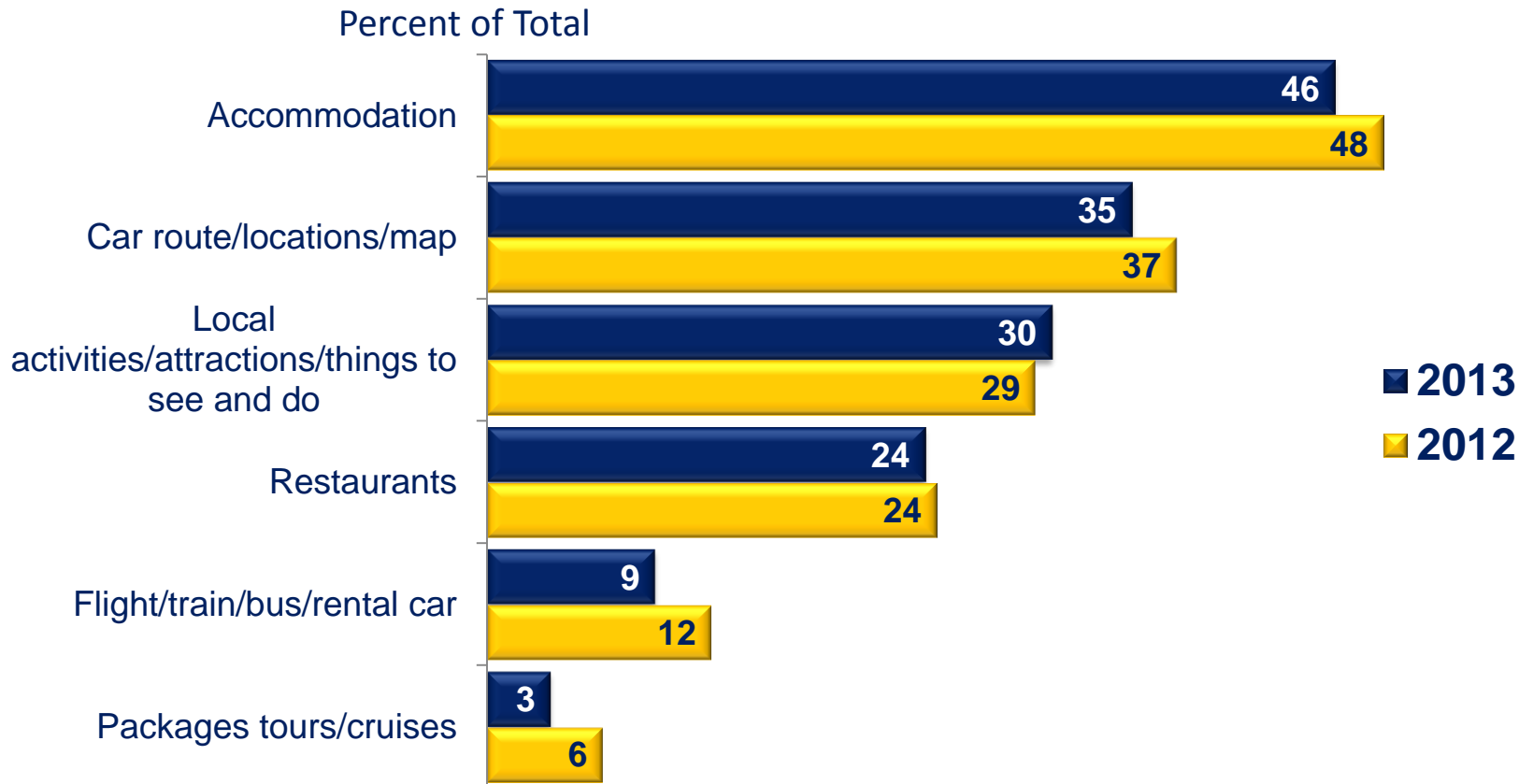
Base: Marketable Overnight Trips



Trip Elements Planned Using Internet



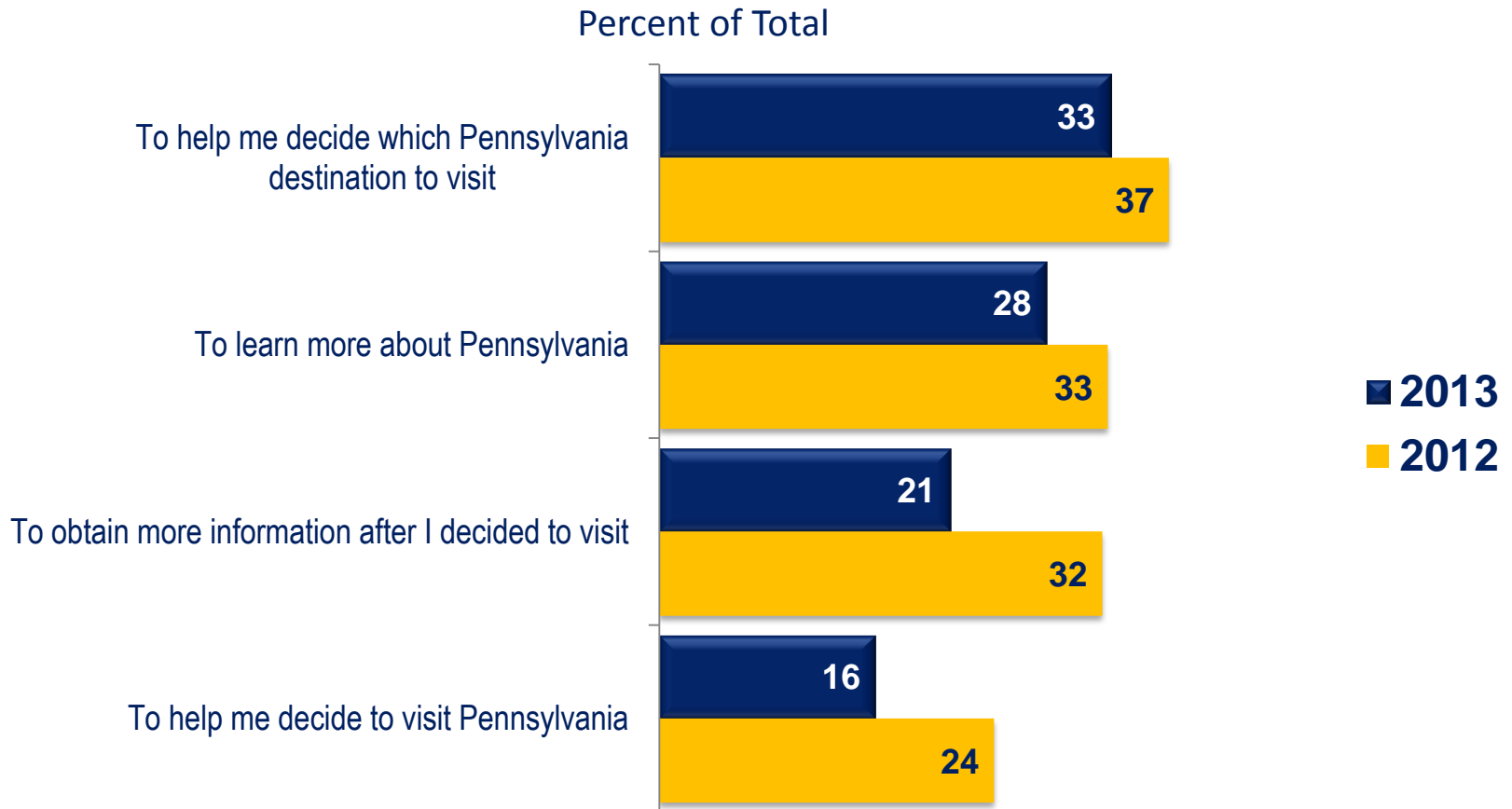
Base: Marketable Overnight Trips



Reasons for Visiting www.visitpa.com



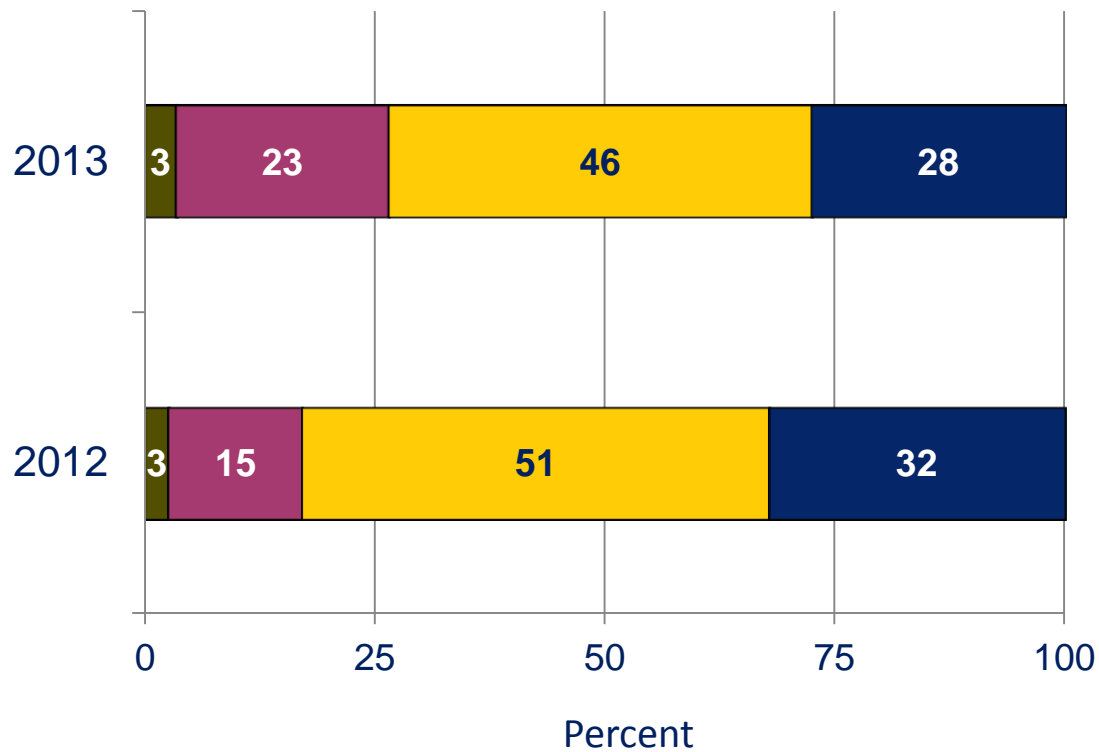
Base: Marketable Overnight Trips



www.visitpa.com Influence on Planning



Base: Marketable Overnight Trips

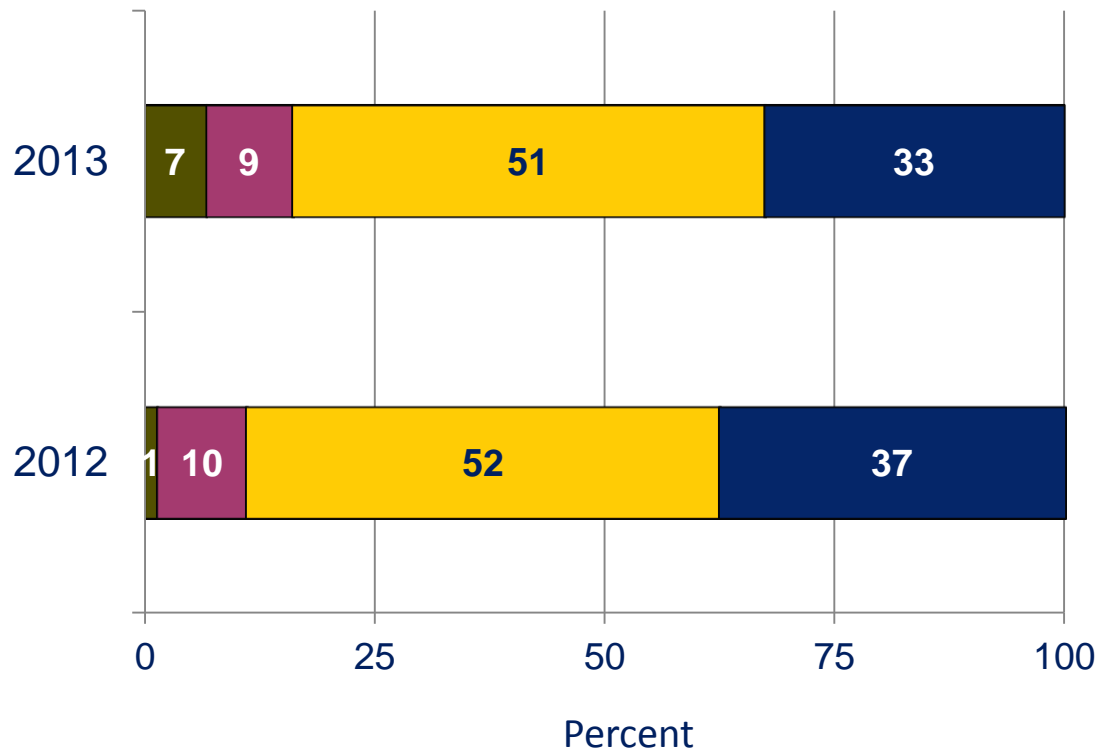


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

www.visitpa.com Influence on Visitation



Base: Marketable Overnight Trips

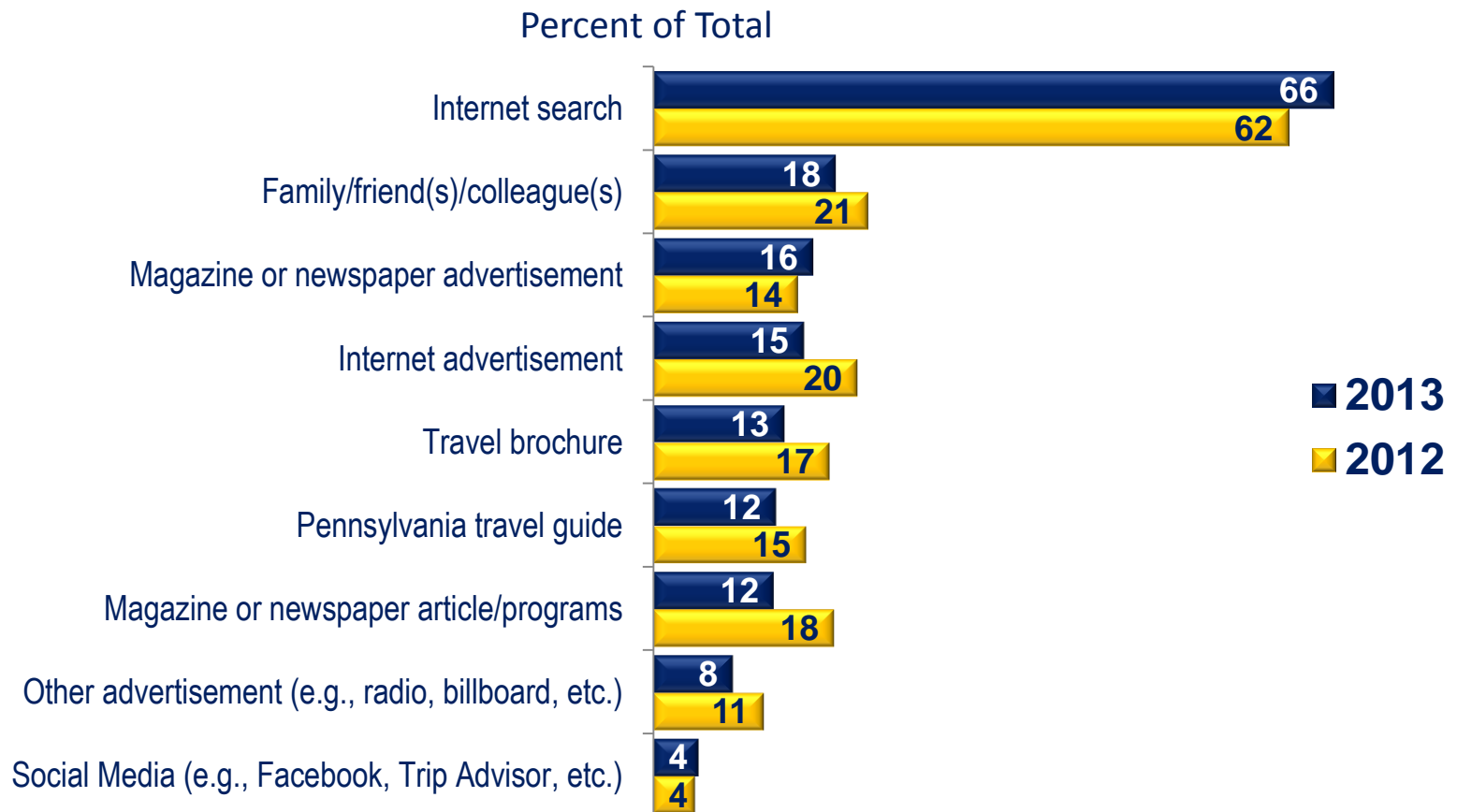


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

Channels to www.visitpa.com



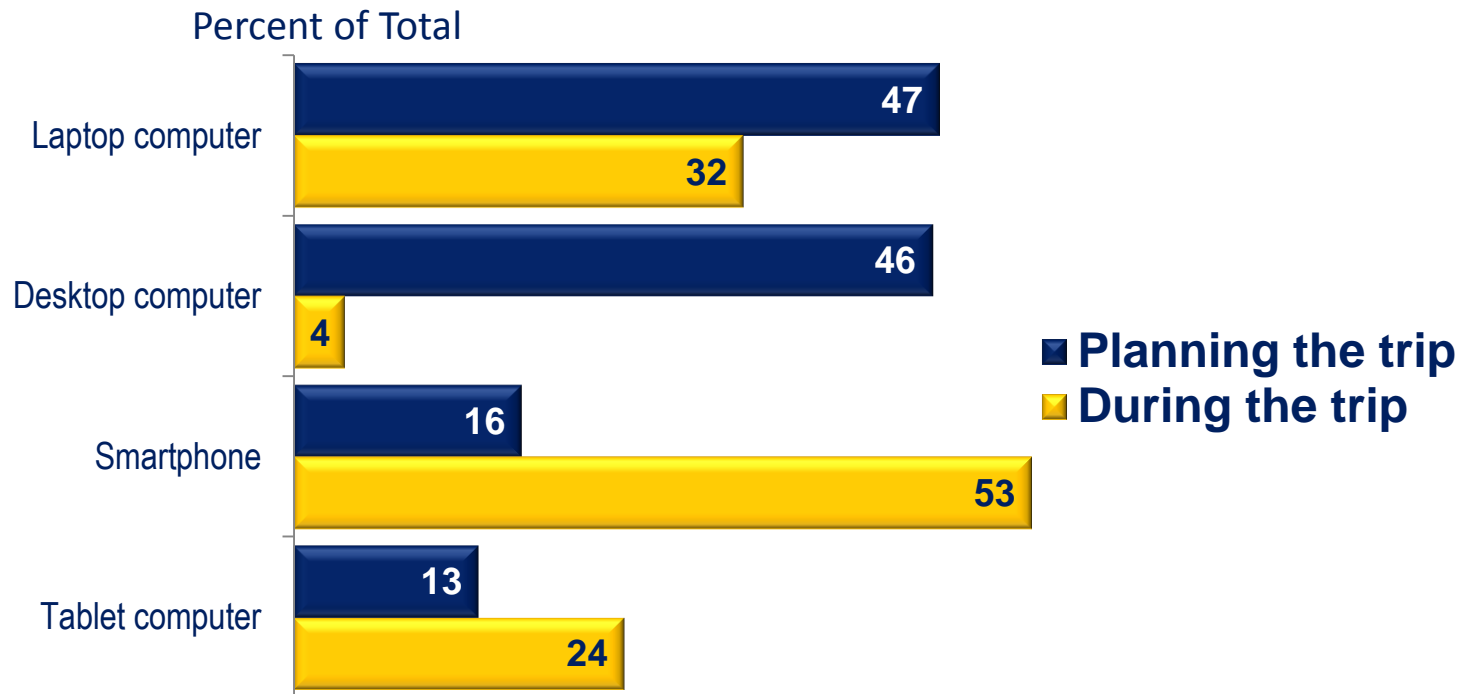
Base: Marketable Overnight Trips



Technology Used by Travelers



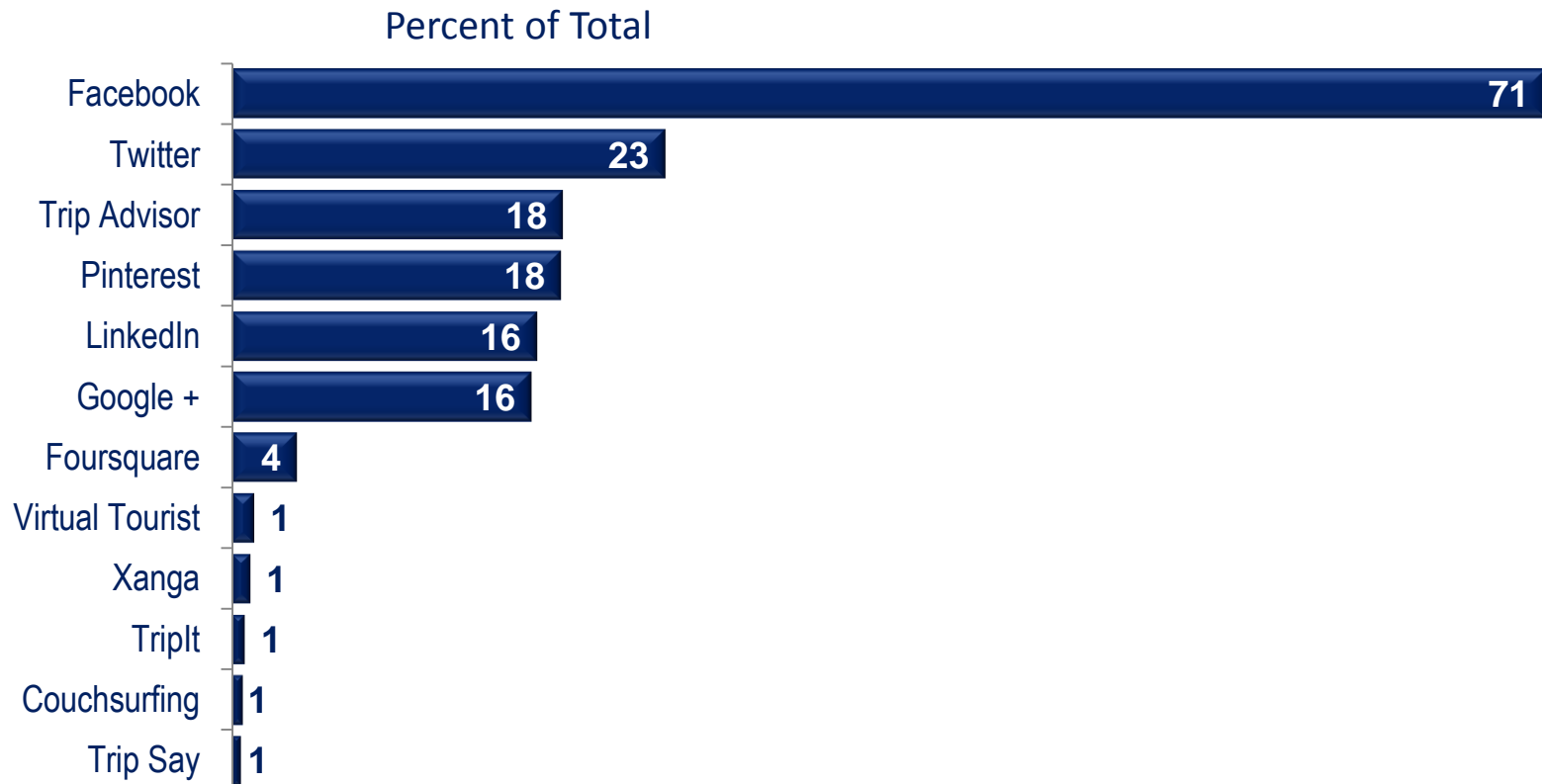
Base: Marketable Overnight Trips



Social Media Visited by Travelers



Base: Marketable Overnight Trips



Planning Considerations Beyond Cost



Base: Marketable Overnight Trips

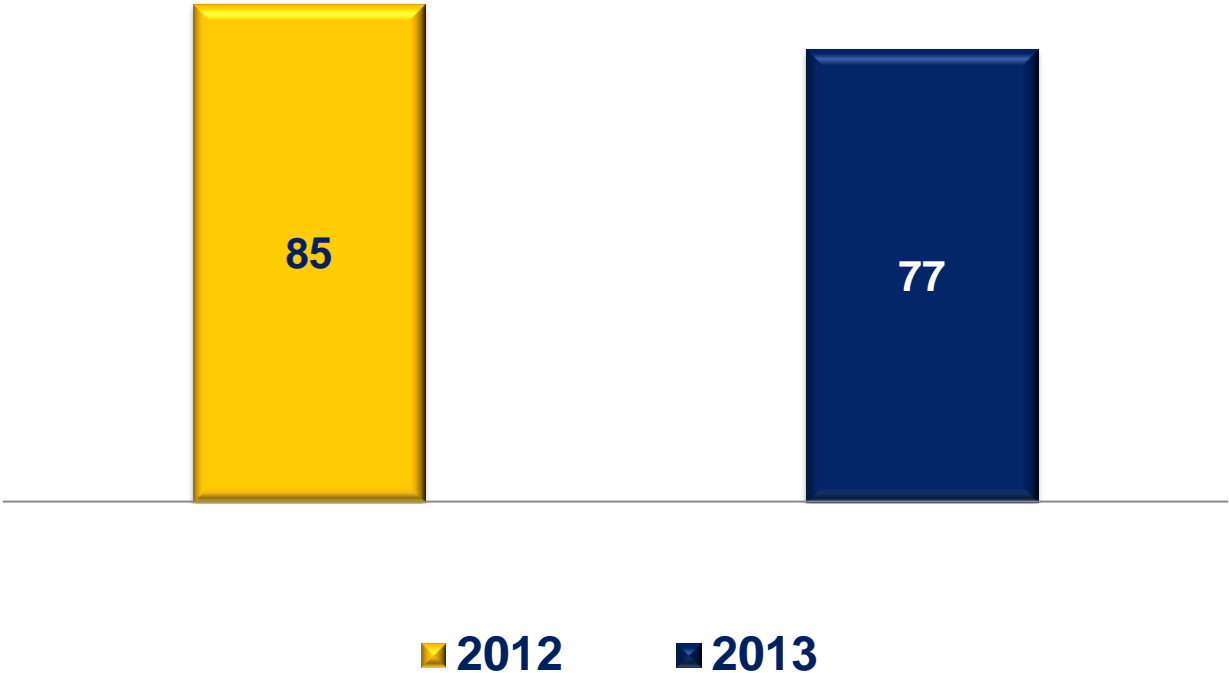


Percent of Travelers Booking In Advance



Base: Marketable Overnight Trips

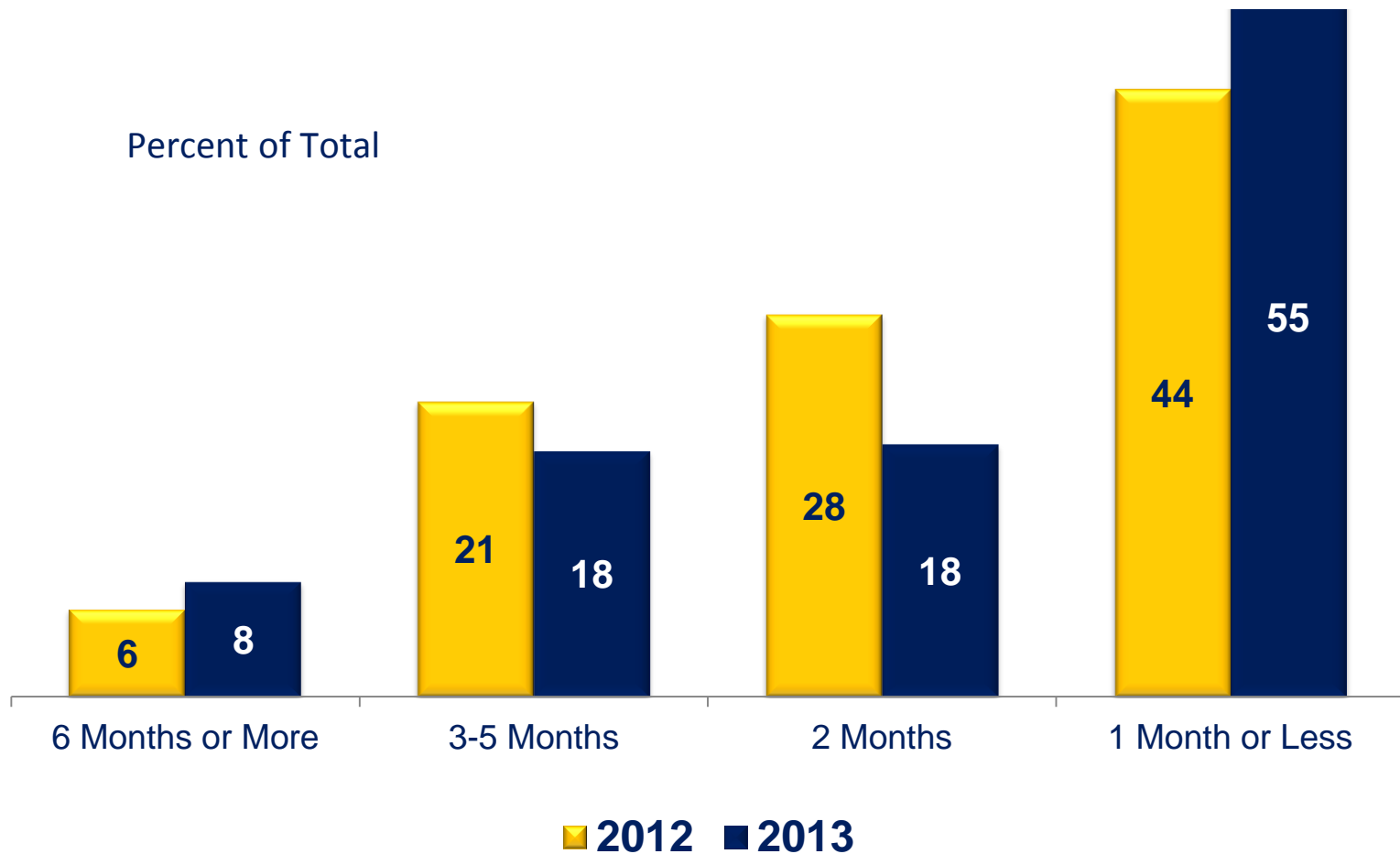
Percent of Total



Booking Cycle



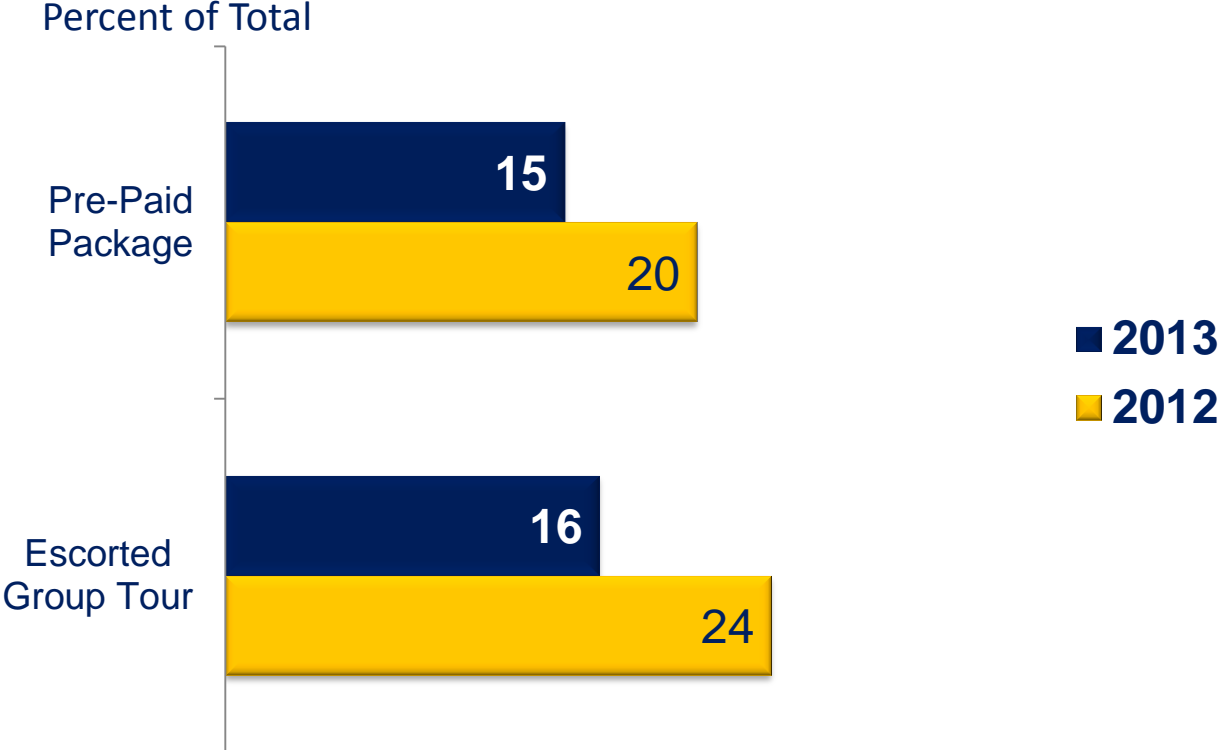
Base: Marketable Overnight Trips



Use of Vacation Packages and Group Travel



Base: Marketable Overnight Trips

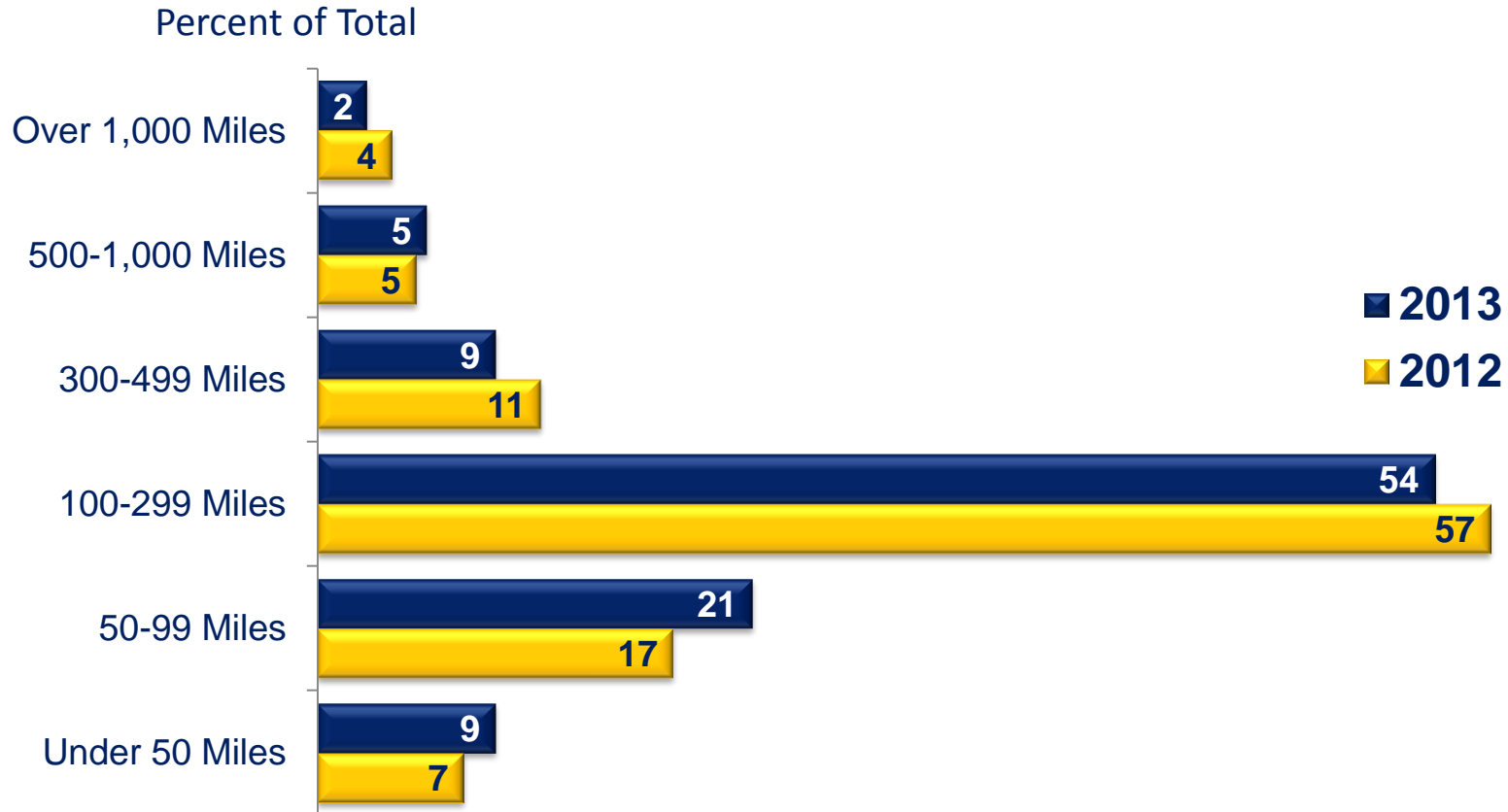


Trip Characteristics of Pennsylvania's Marketable Overnight Travelers

Distance Traveled to Pennsylvania



Base: Marketable Overnight Trips

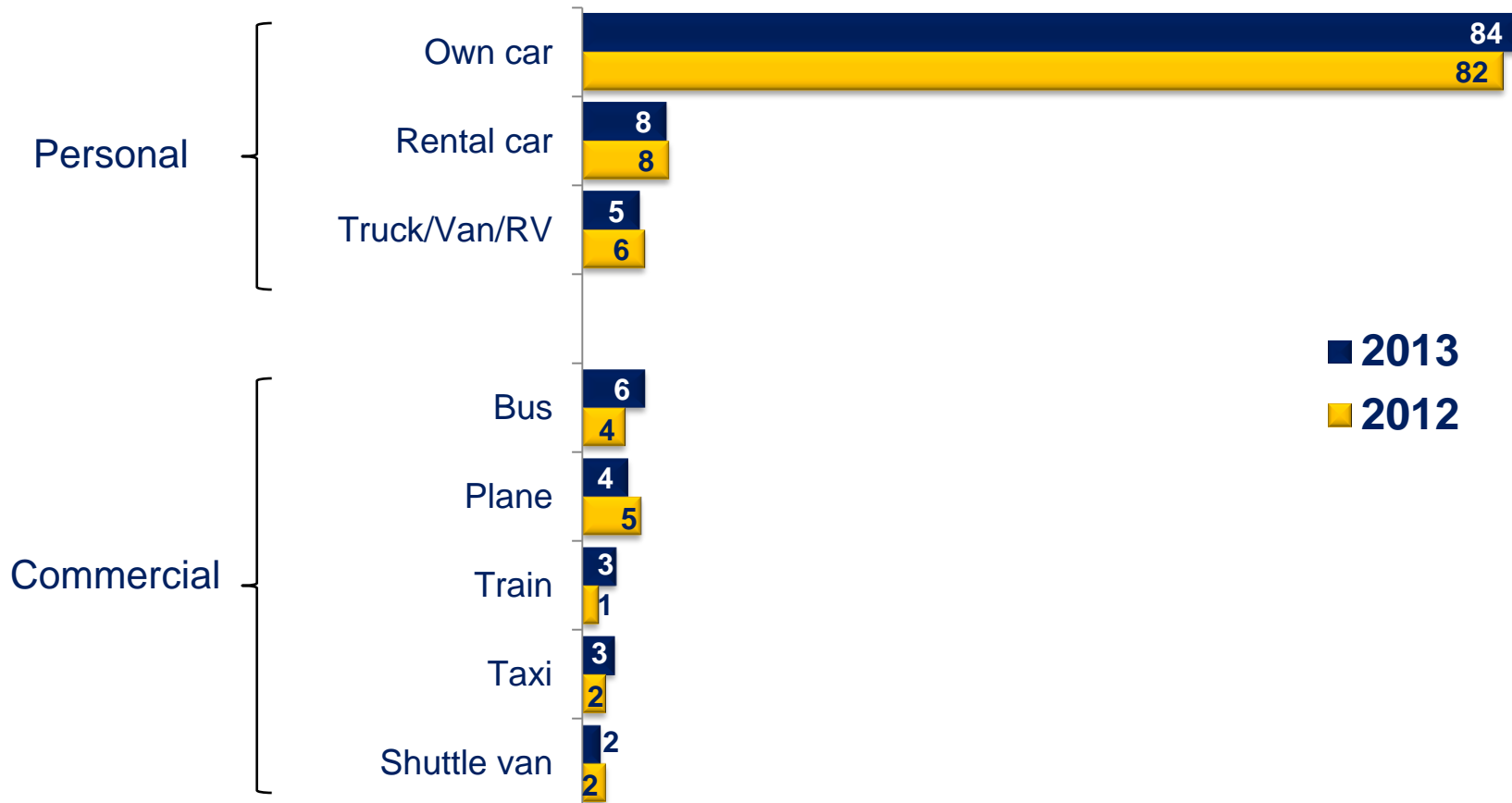


Transportation Used to Enter Pennsylvania



Base: Marketable Overnight Trips starting outside Pennsylvania

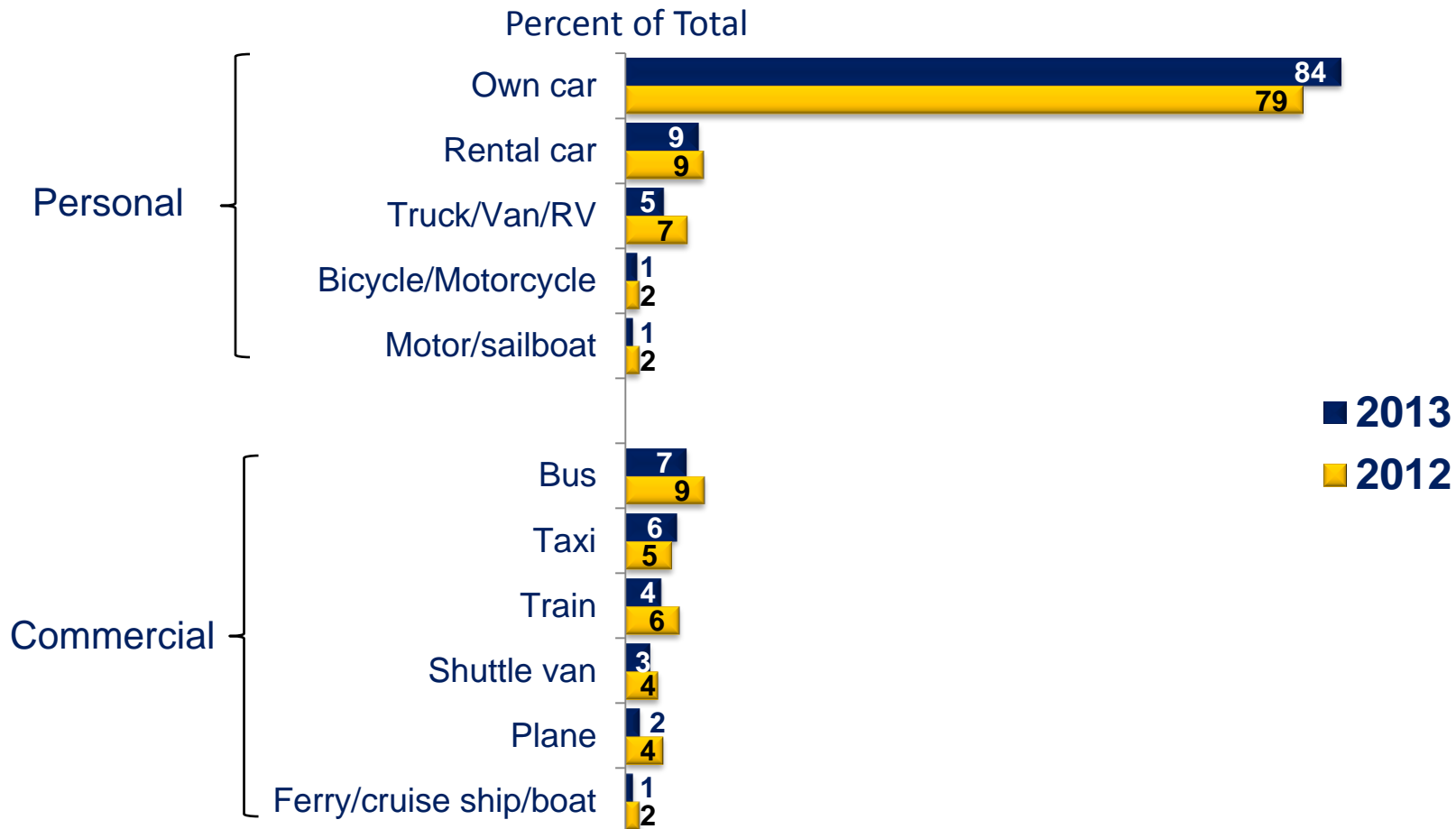
Percent of Total



Transportation Used Inside Pennsylvania



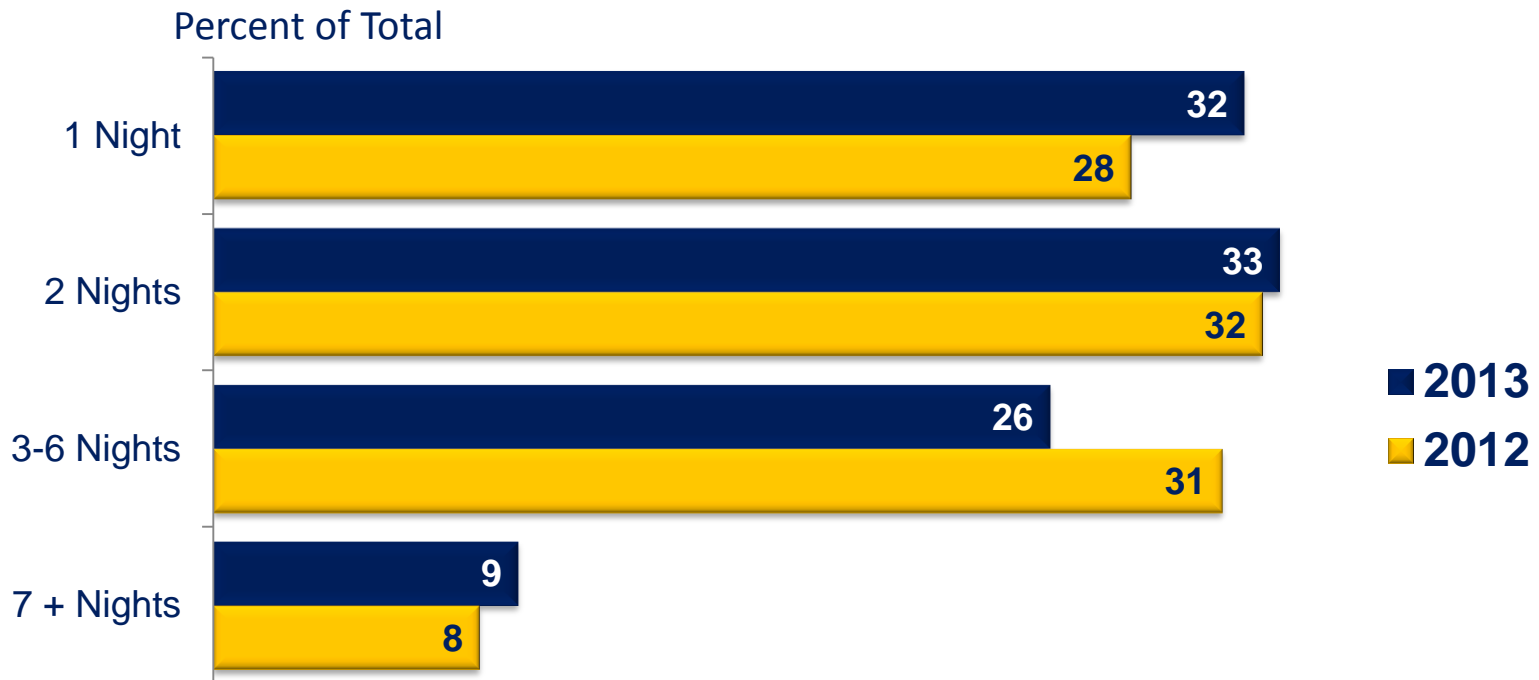
Base: Marketable Overnight Trips



Total Nights Away



Base: Marketable Overnight Trips

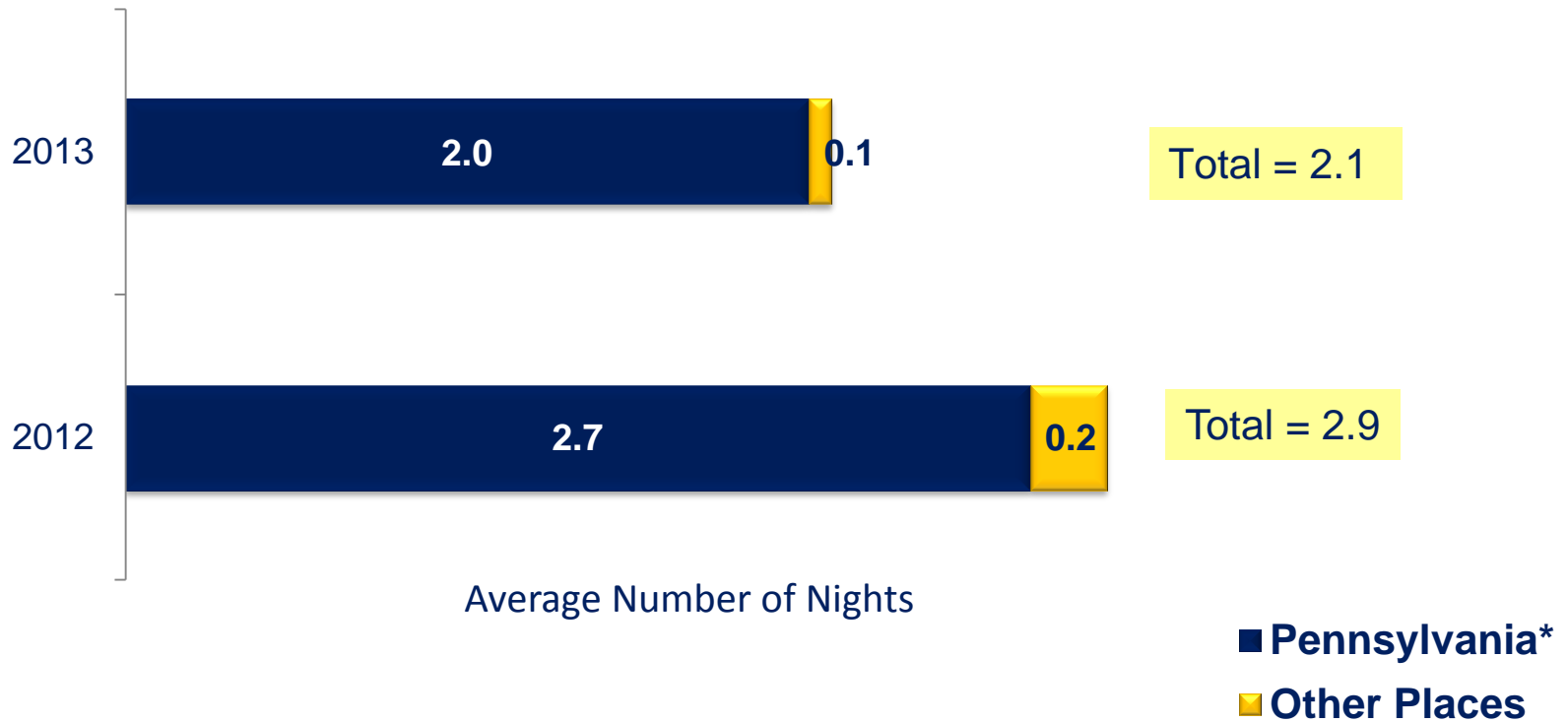


Average Number of Nights: $\frac{2013}{3.1}$ $\frac{2012}{3.1}$

Length of Stay



Base: Marketable Overnight Trips



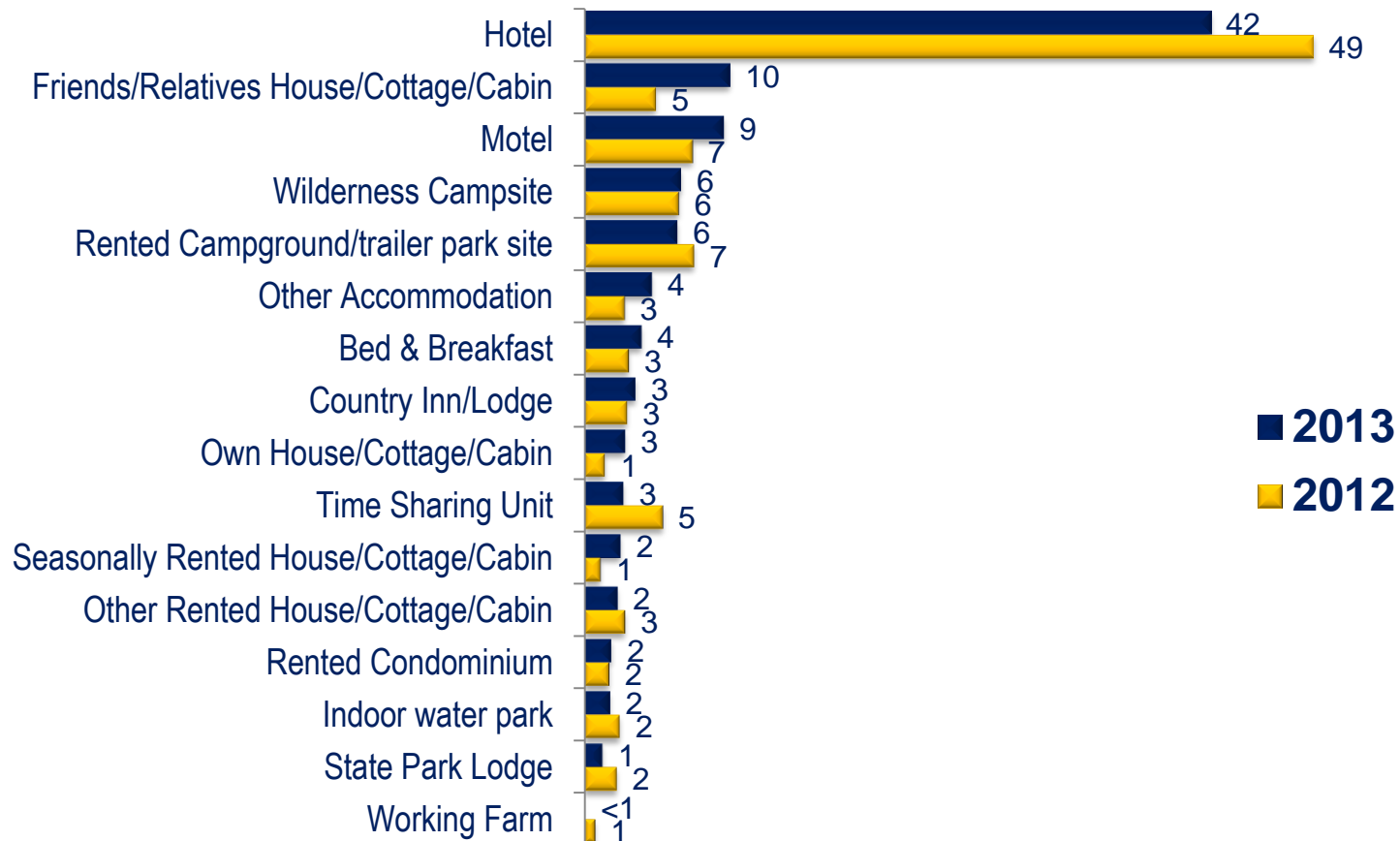
* Those who spent 1+ nights anywhere in Pennsylvania

Accommodations*



Base: Marketable Overnight Trips

Percent of Total

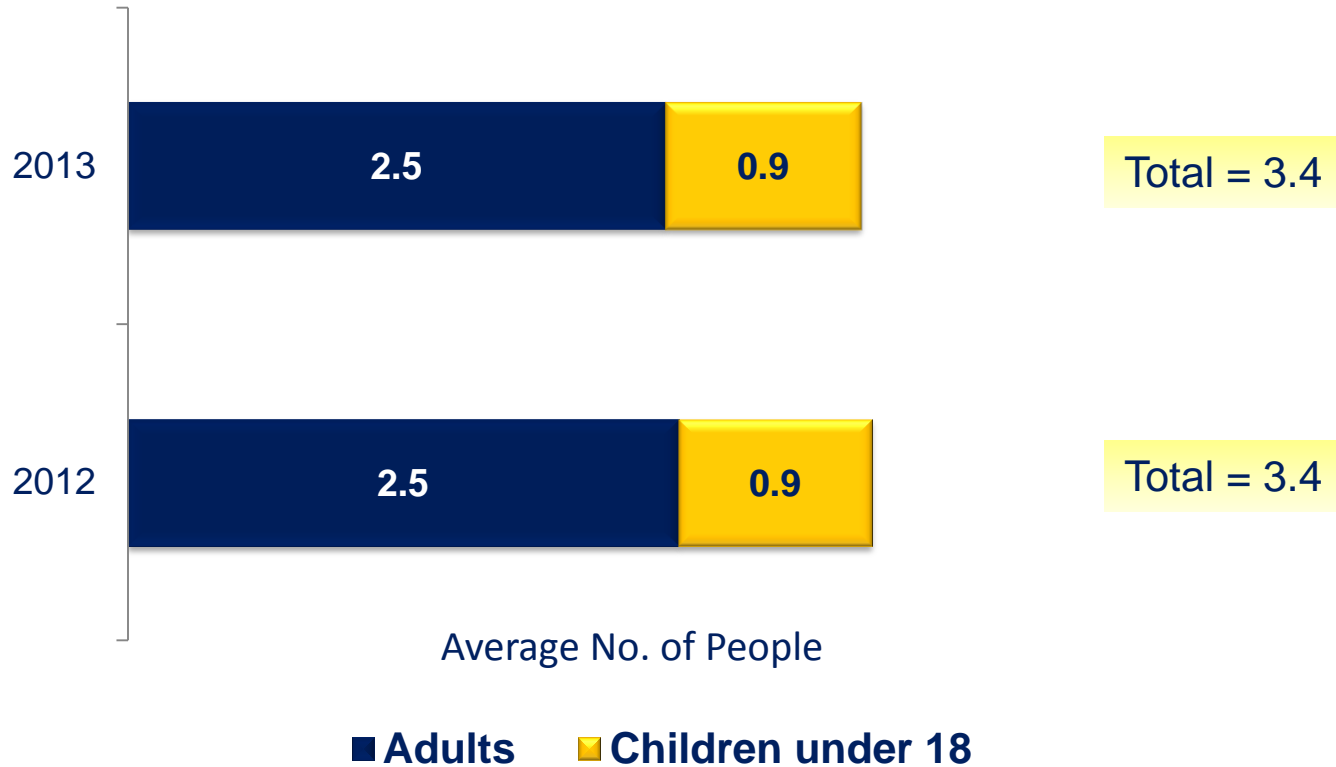


* Percent of trip nights spent in each type of accommodation

Size of Travel Party



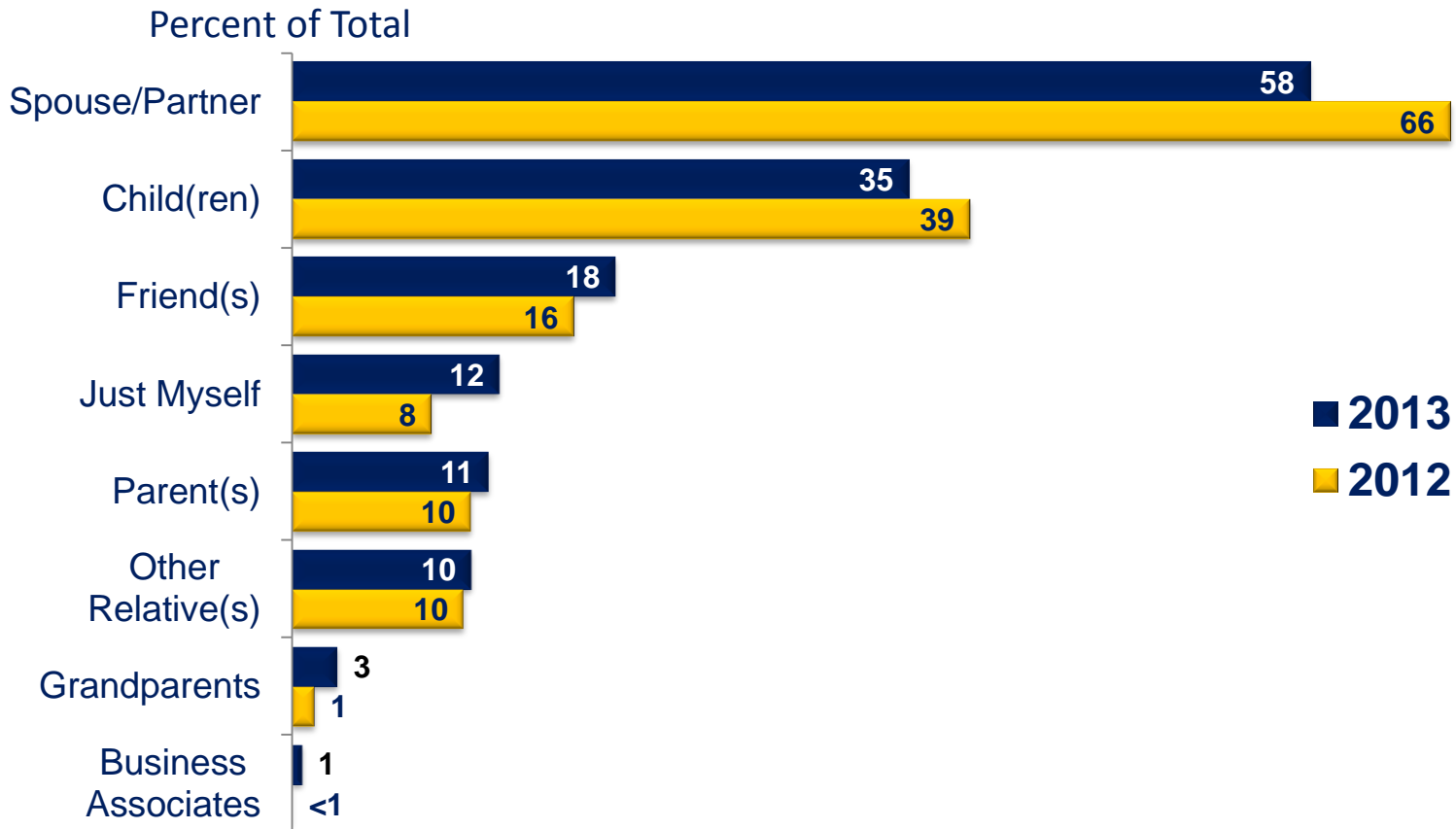
Base: Marketable Overnight Trips



Composition of Travel Party



Base: Marketable Overnight Trips

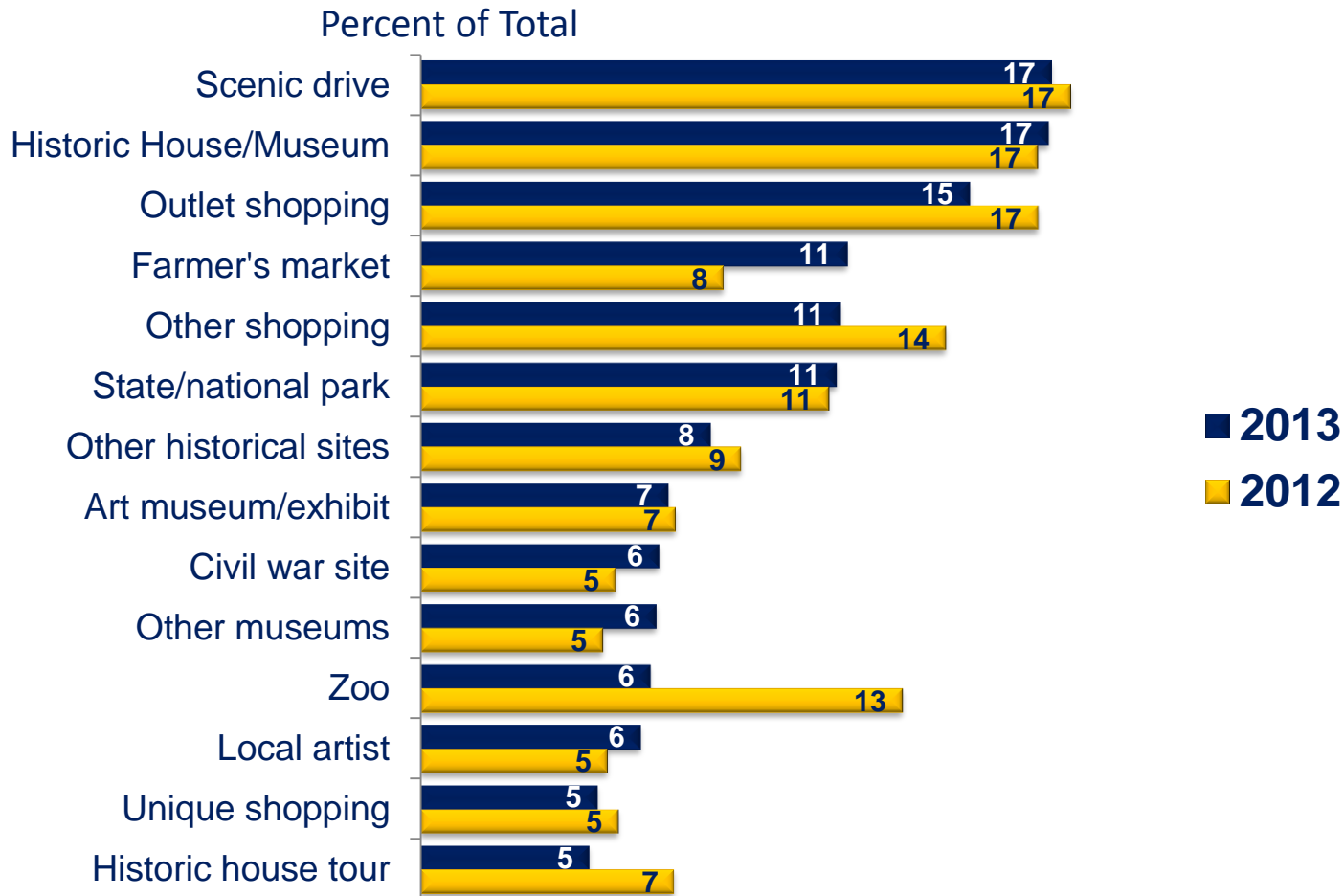


**Trip Experiences —
Marketable Overnight Trips**

Things Seen and Experienced on Trip



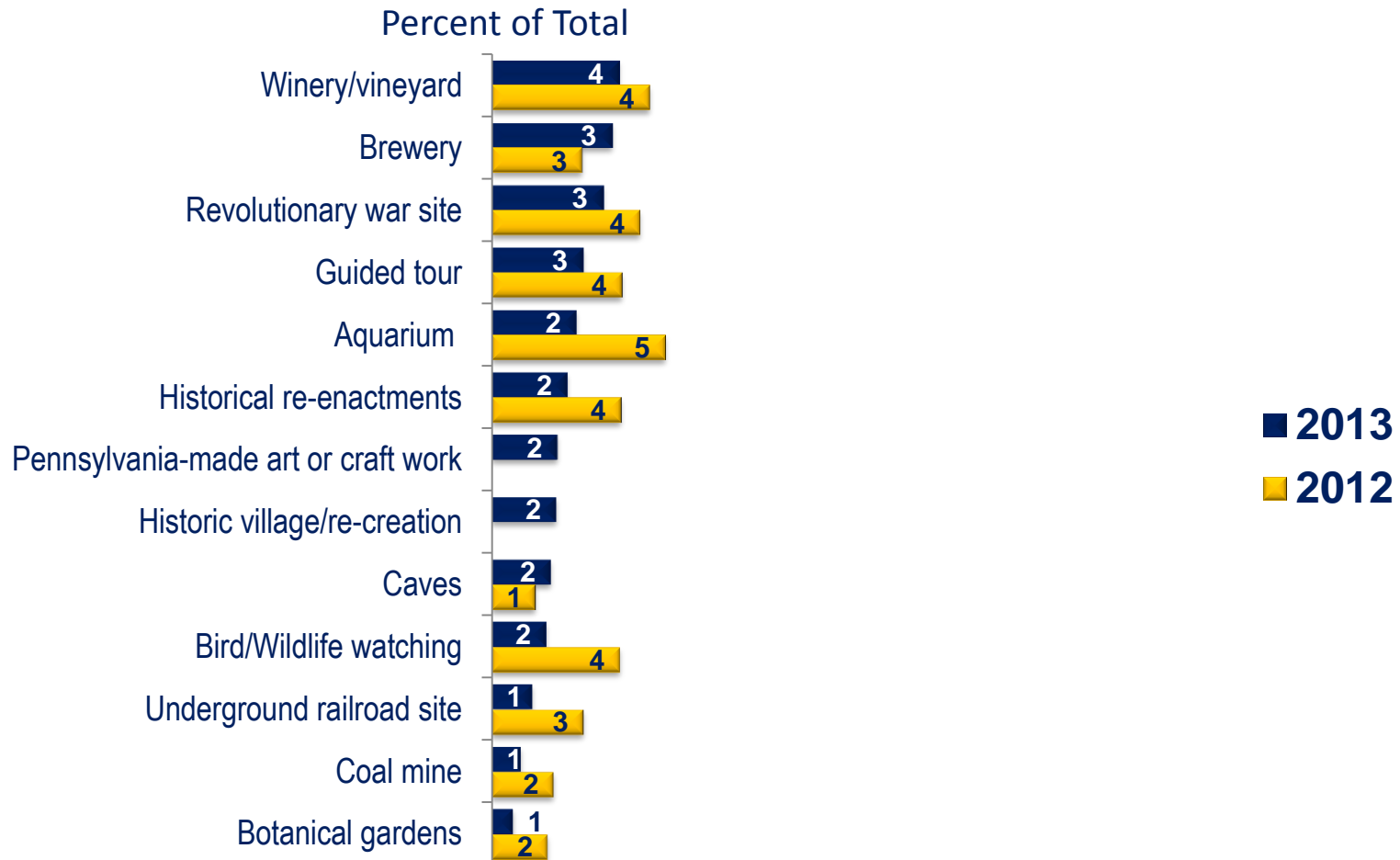
Base: Marketable Overnight Trips



Things Seen and Experienced on Trip (Cont'd)



Base: Marketable Overnight Trips

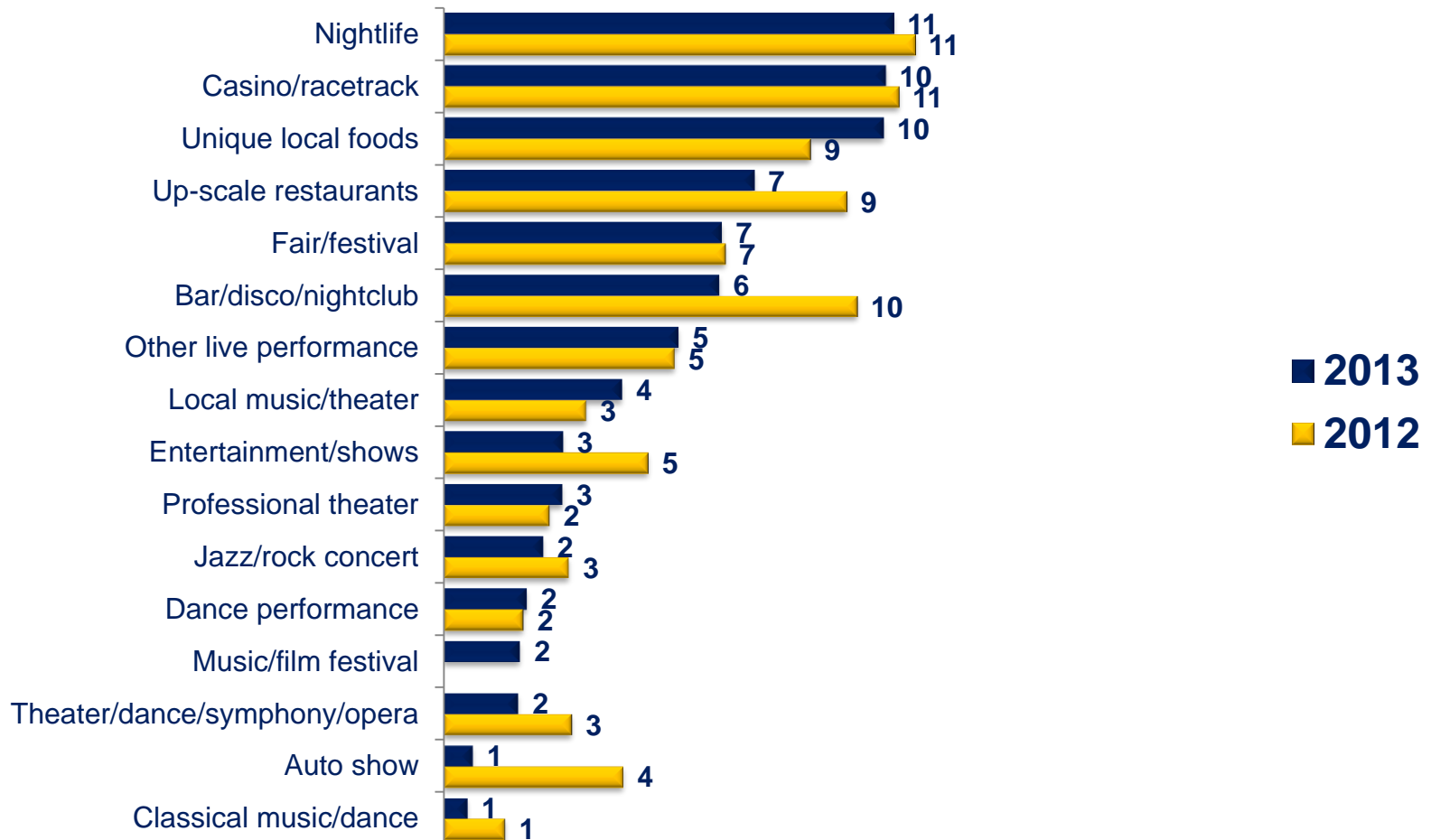


Dining/Entertainment



Base: Marketable Overnight Trips

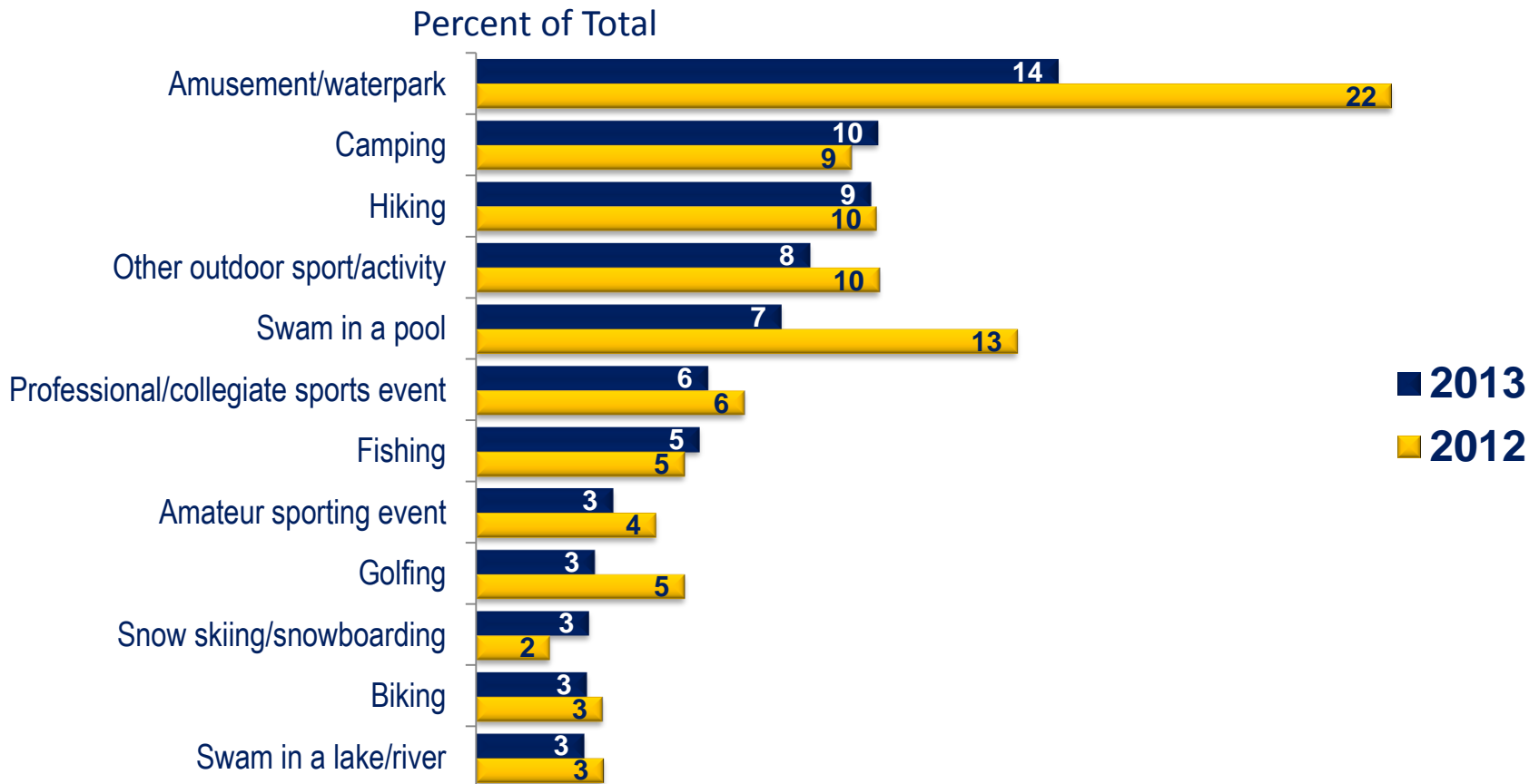
Percent of Total



Sports and Recreation



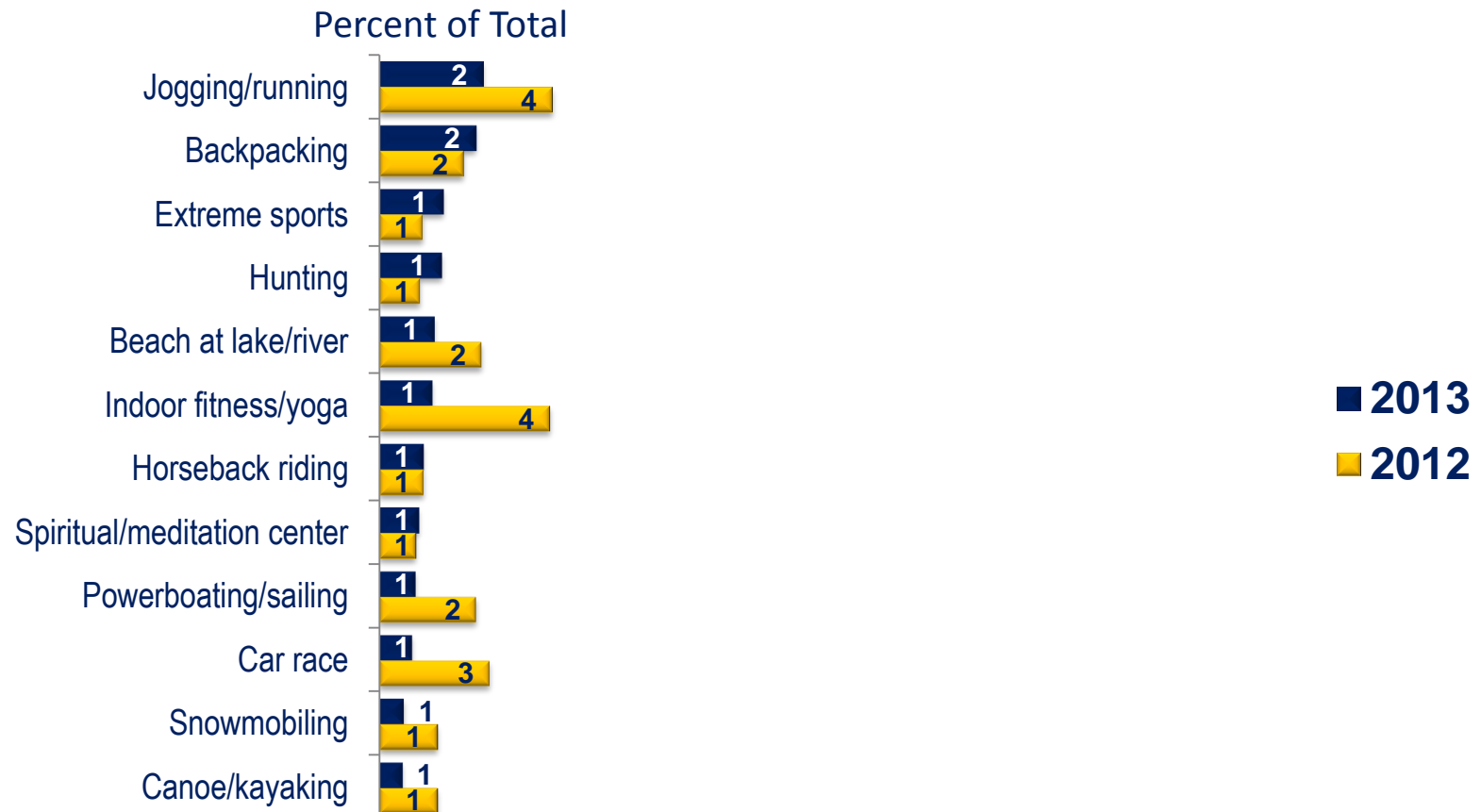
Base: Marketable Overnight Trips



Sports and Recreation (Cont'd)



Base: Marketable Overnight Trips



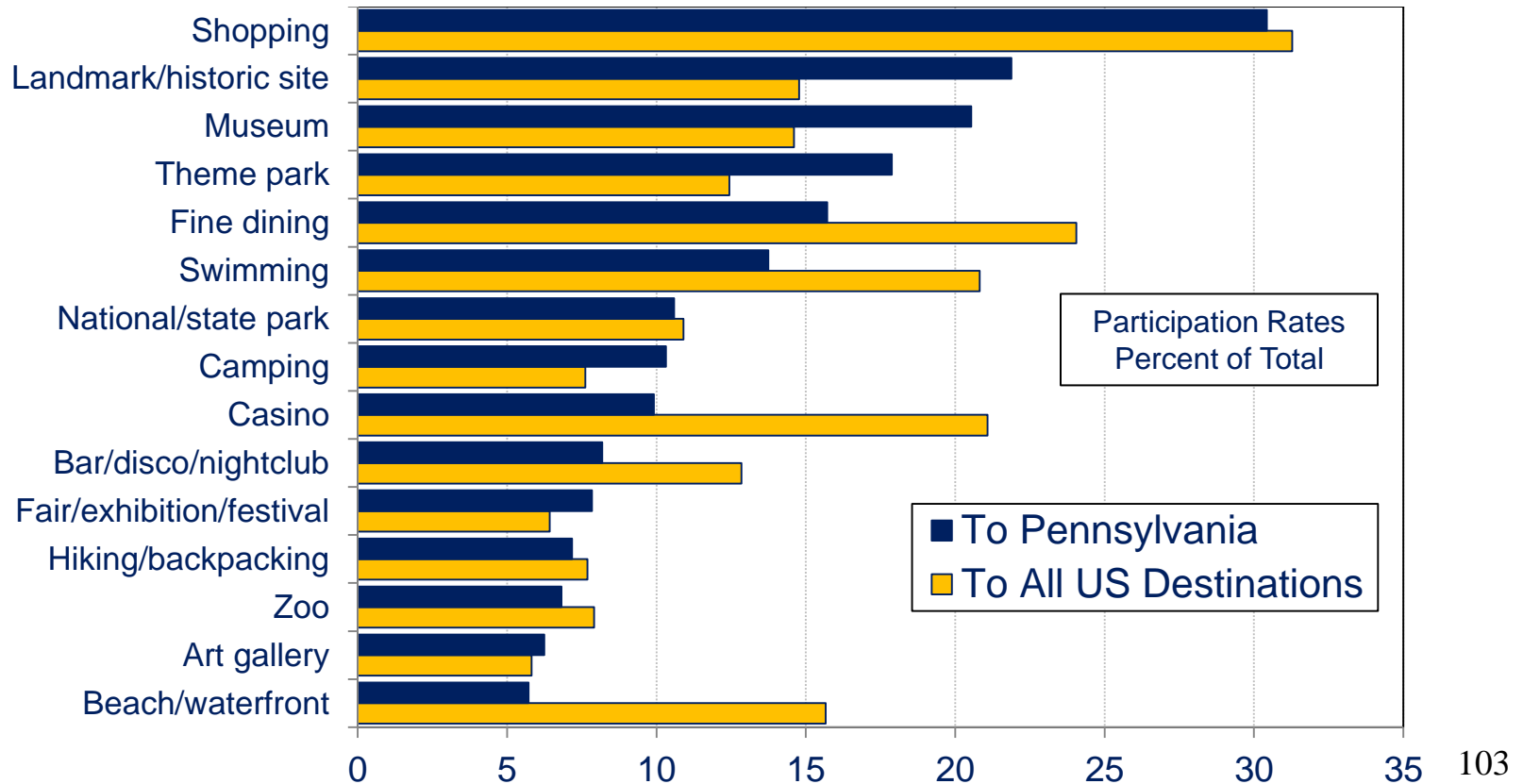
Activities by Origin Market of Marketable Overnight Travelers

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



Base: Marketable Overnight Trips

Pennsylvania had a distinct advantage over other US destinations in attracting NY travelers who were interested in theme parks, historic sites, and museums in 2013.

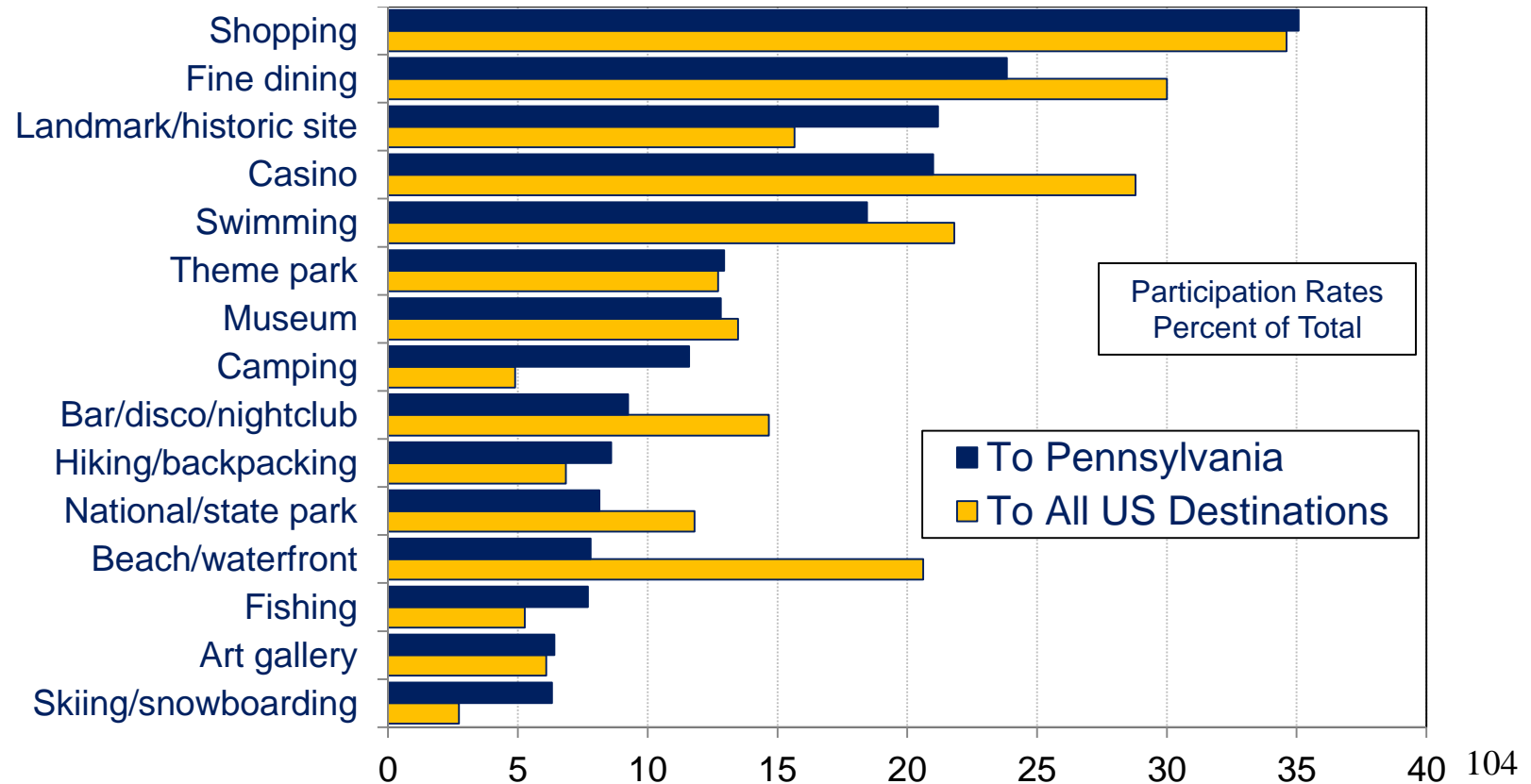


Main Activities of Travelers from New Jersey on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Marketable Overnight Trips

Pennsylvania had an advantage over other US destinations in attracting NJ travelers who were interested in historic sites, camping, and skiing/snowboarding in 2013.

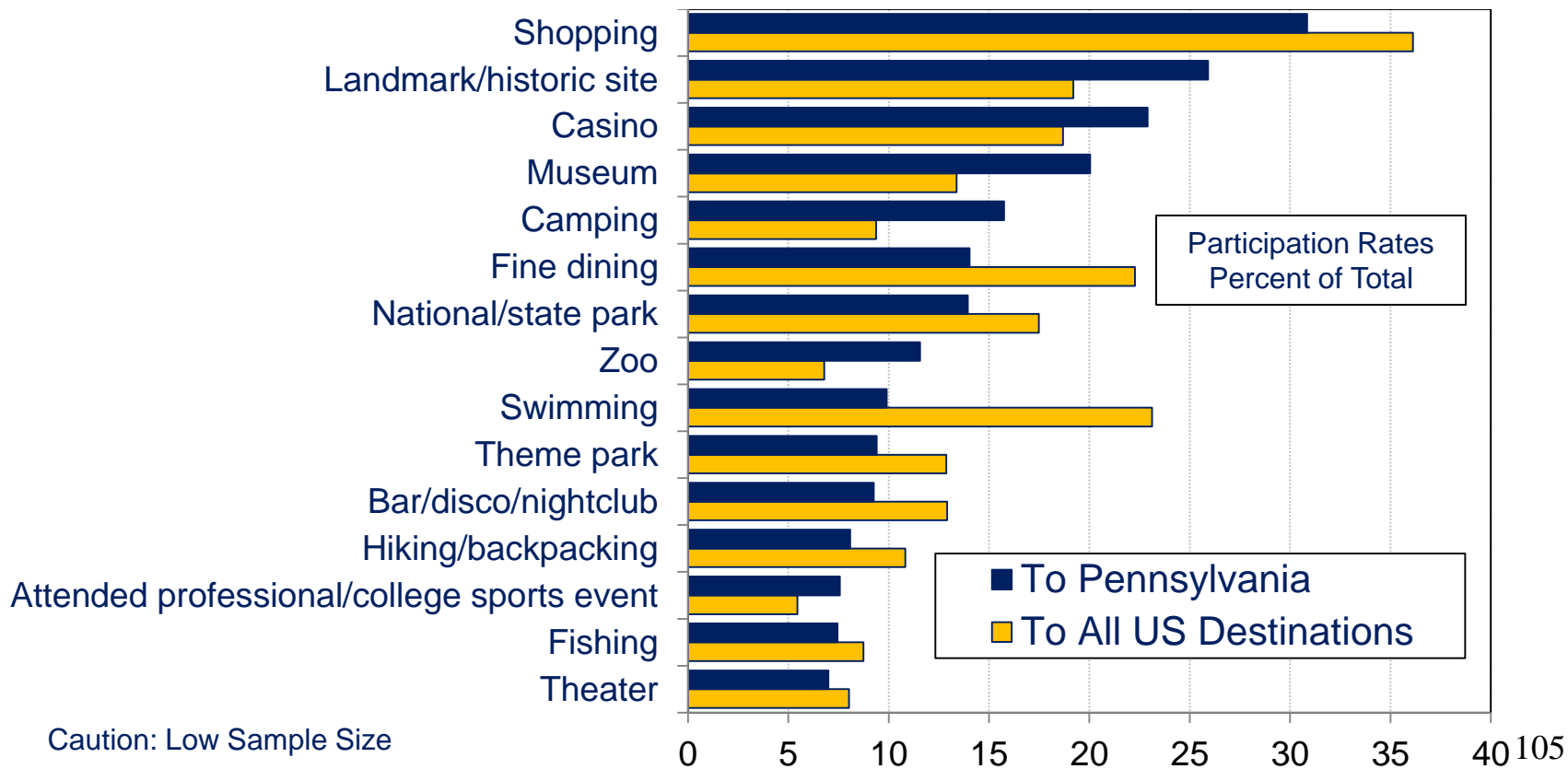


Main Activities of Travelers from Ohio on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Marketable Overnight Trips

Pennsylvania had an advantage over other US destinations in attracting OH travelers who were interested in historic sites, casinos, museums, and sports events in 2013.



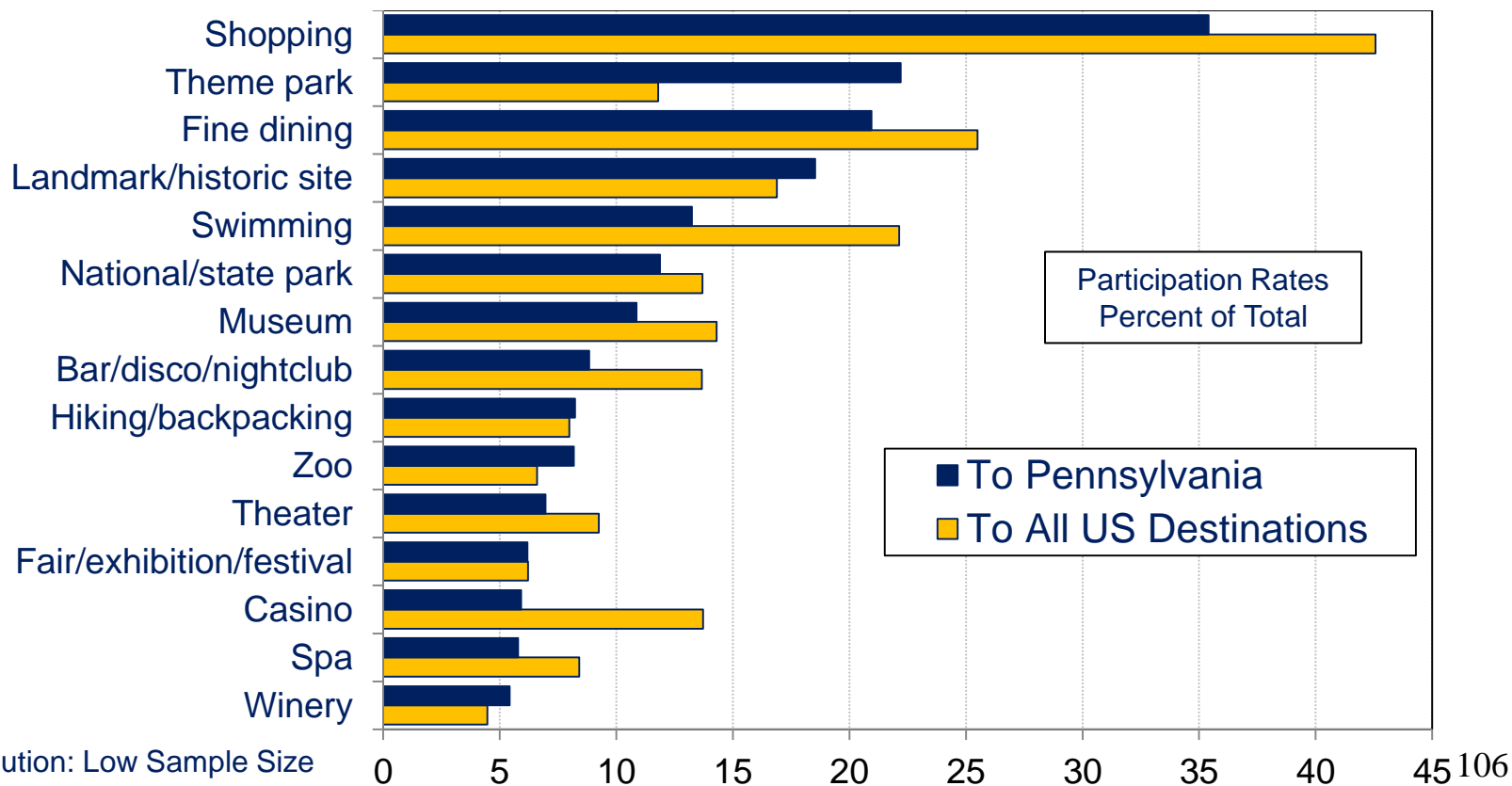
Caution: Low Sample Size

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



Base: Marketable Overnight Trips

Pennsylvania has an advantage over other US destinations in attracting MD travelers who were interested in theme parks, historic sites, zoos, and wineries in 2013.

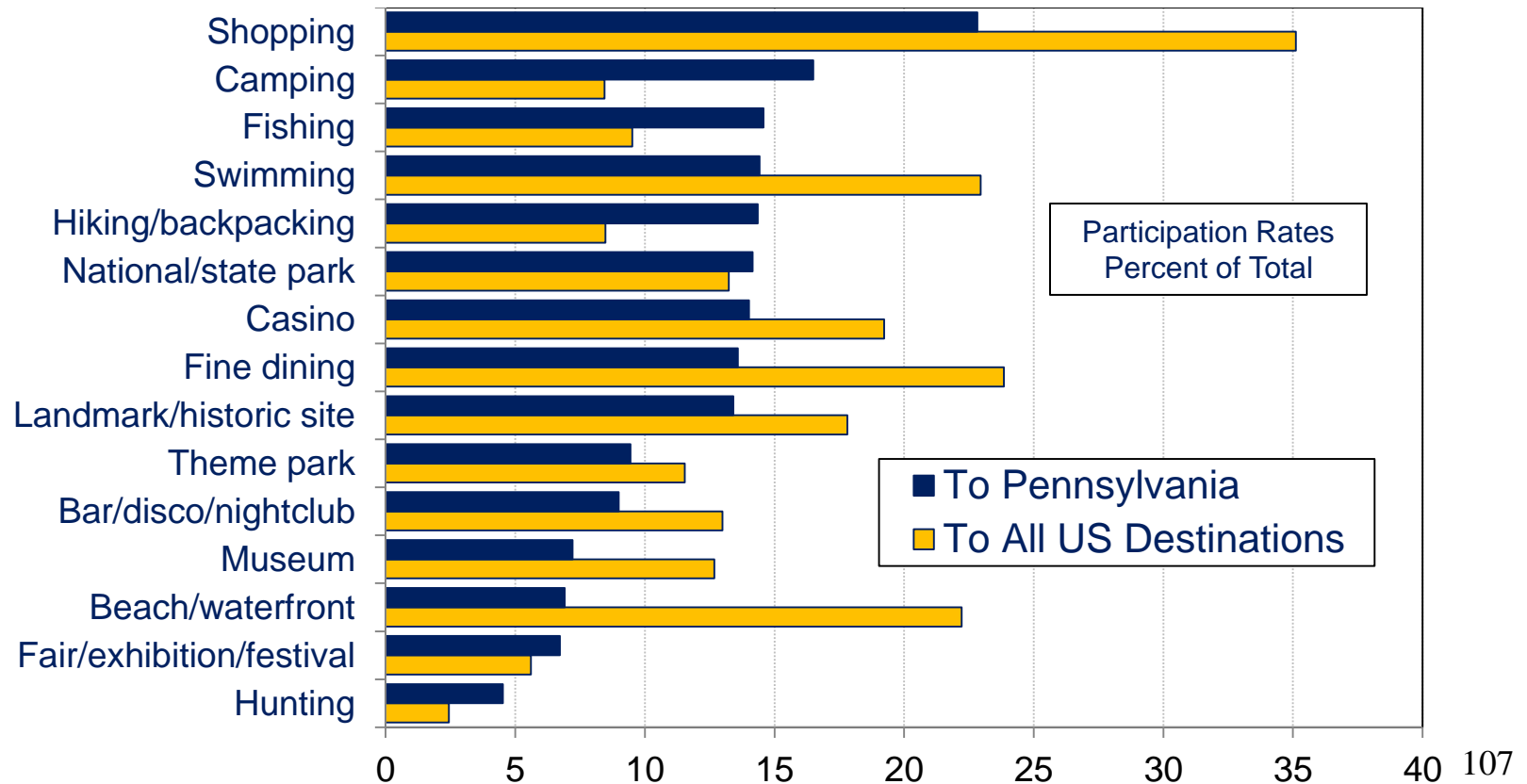


Main Activities of Travelers from Pennsylvania on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Marketable Overnight Trips

Pennsylvania's outdoor recreational opportunities remained a big draw for the state's resident travelers who took at least one in-state marketable overnight trip in 2013



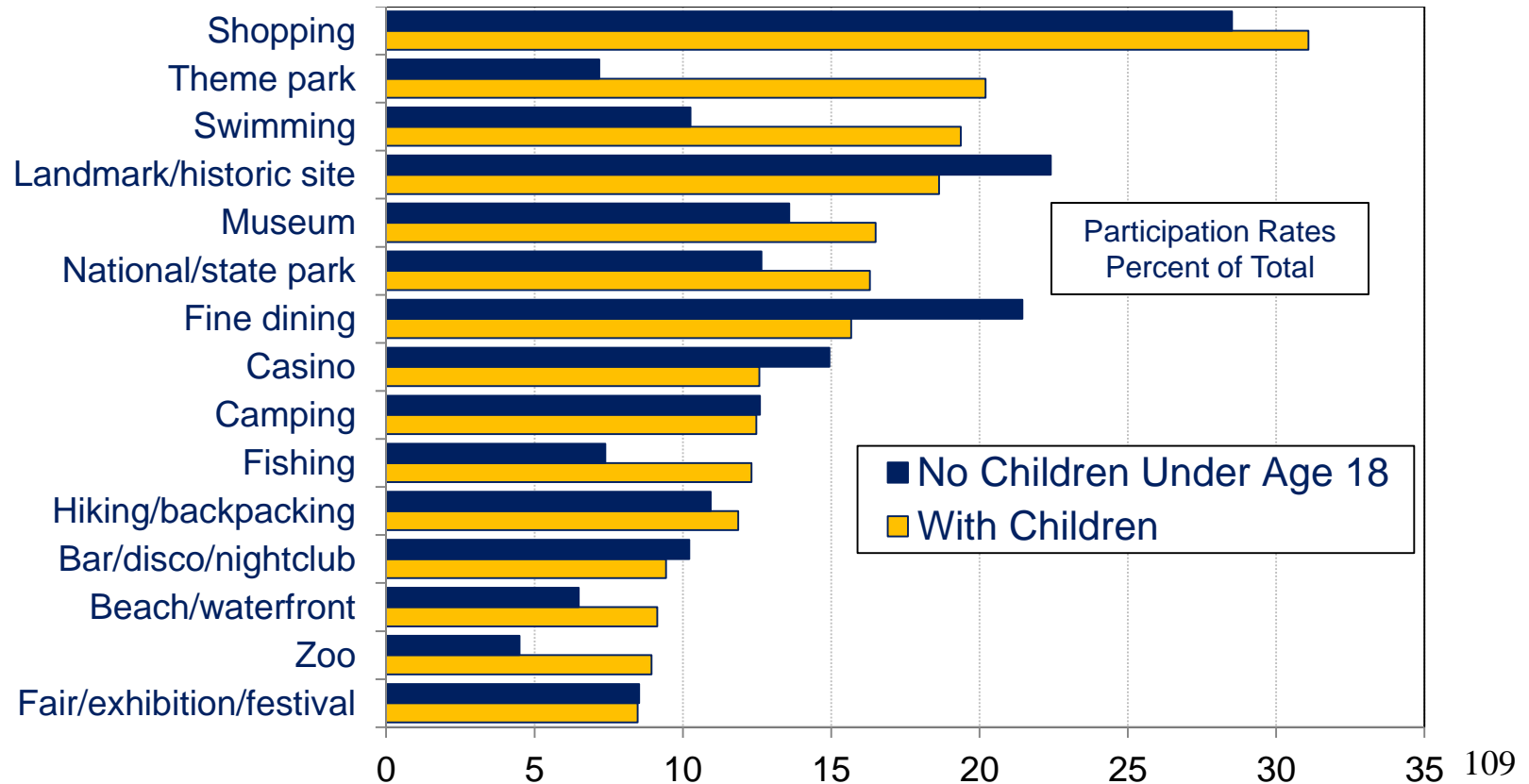
**Activities by
Presence/Absence of Children in
Travelers' Household**

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



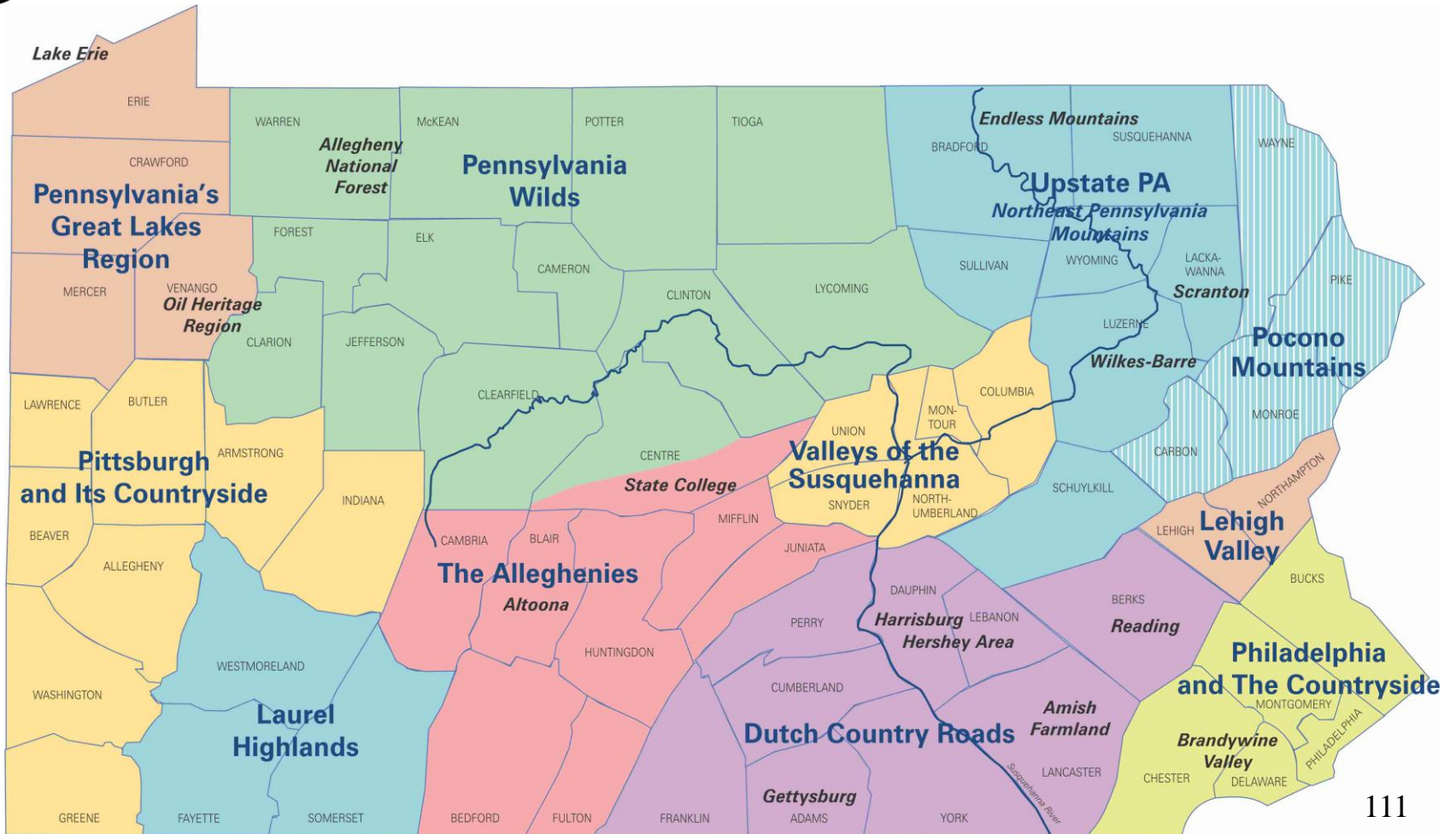
Base: Marketable Overnight Trips

Travelers with children were far more likely to visit a theme park, museum, or national/state park, while those without children were more likely to visit fine dining, casino, or historic site in 2013.



Regional Attractions Visited on 2013 Marketable Overnight Trips

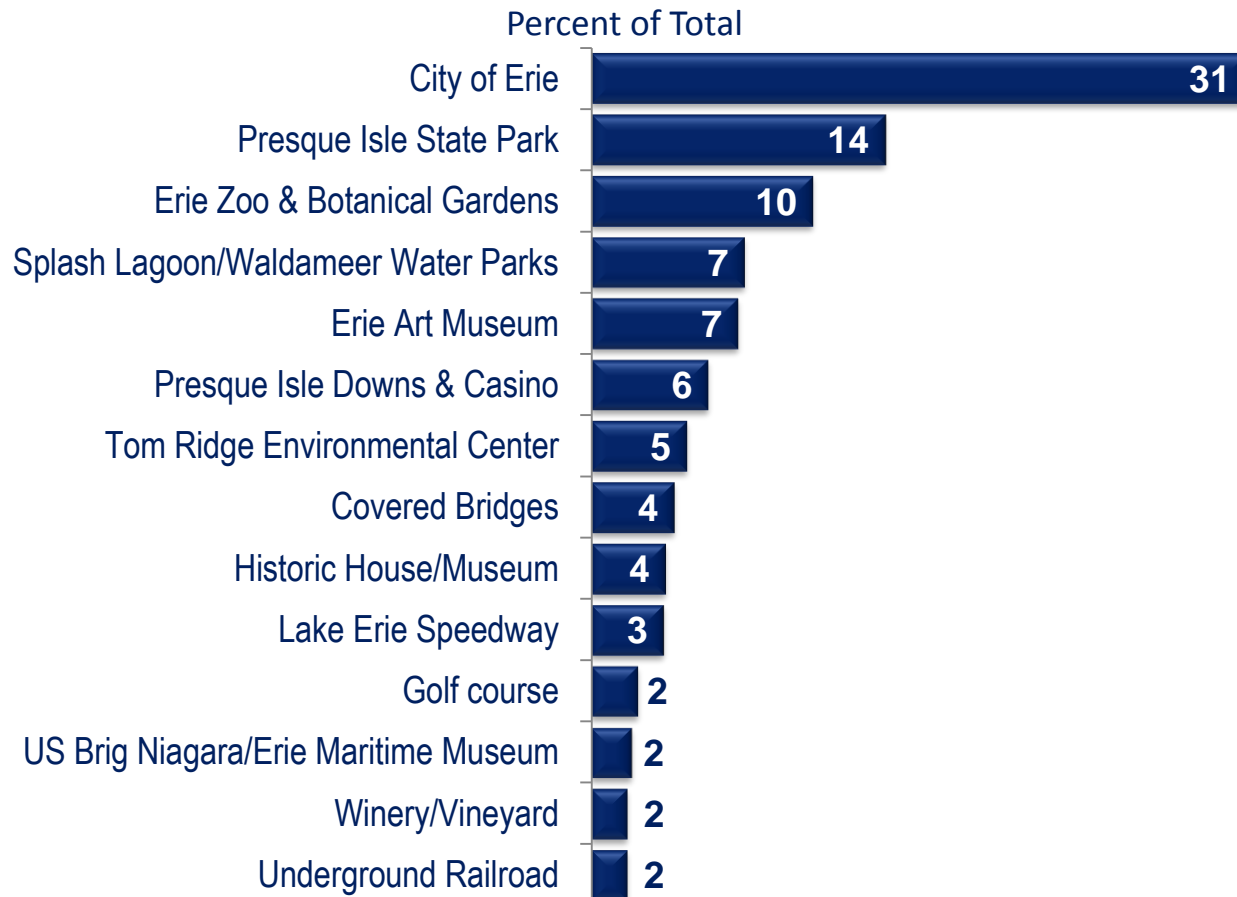
Pennsylvania Regional Map



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



Base: Overnight Trips

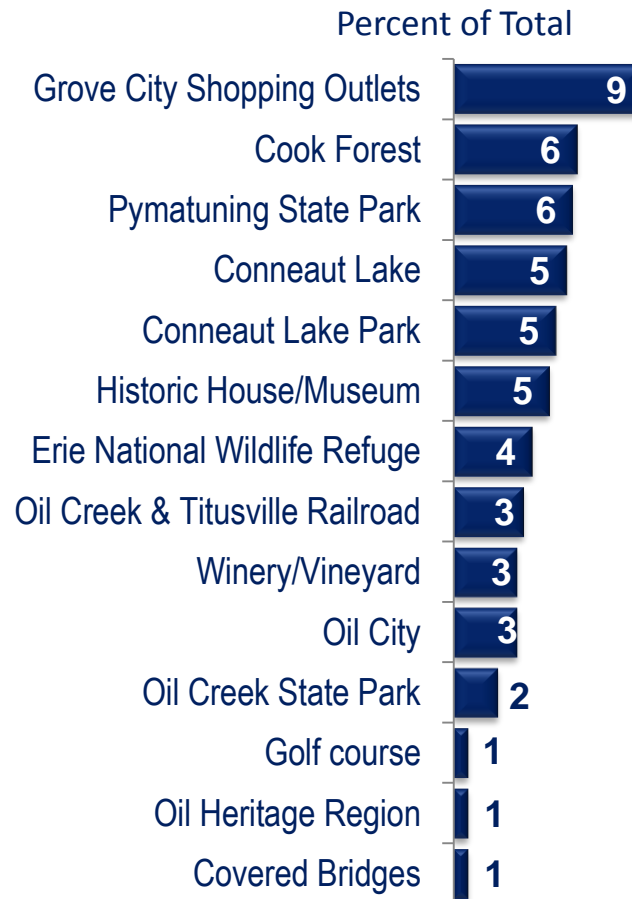


*Erie City area

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



Base: Overnight Trips

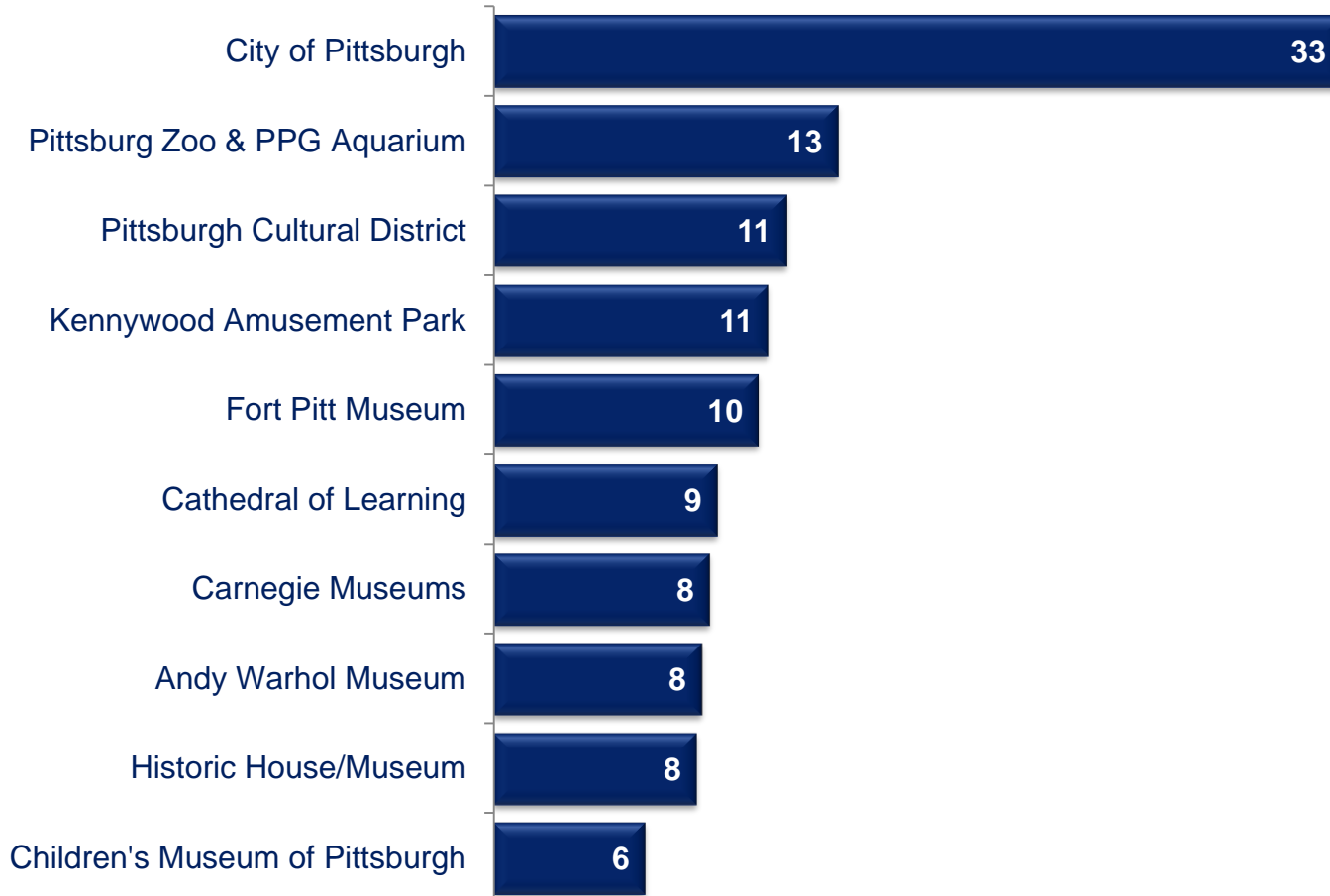


Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



Base: Marketable Overnight Trips

Percent of Total



Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region* (Cont'd)



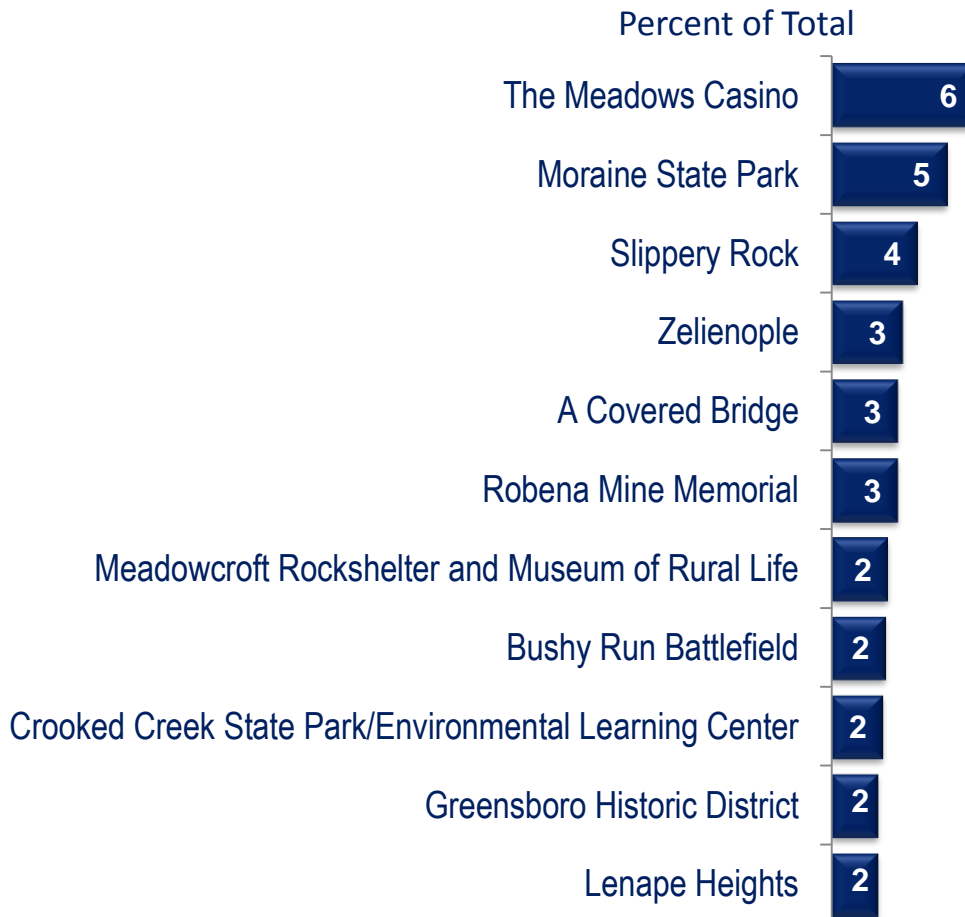
Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



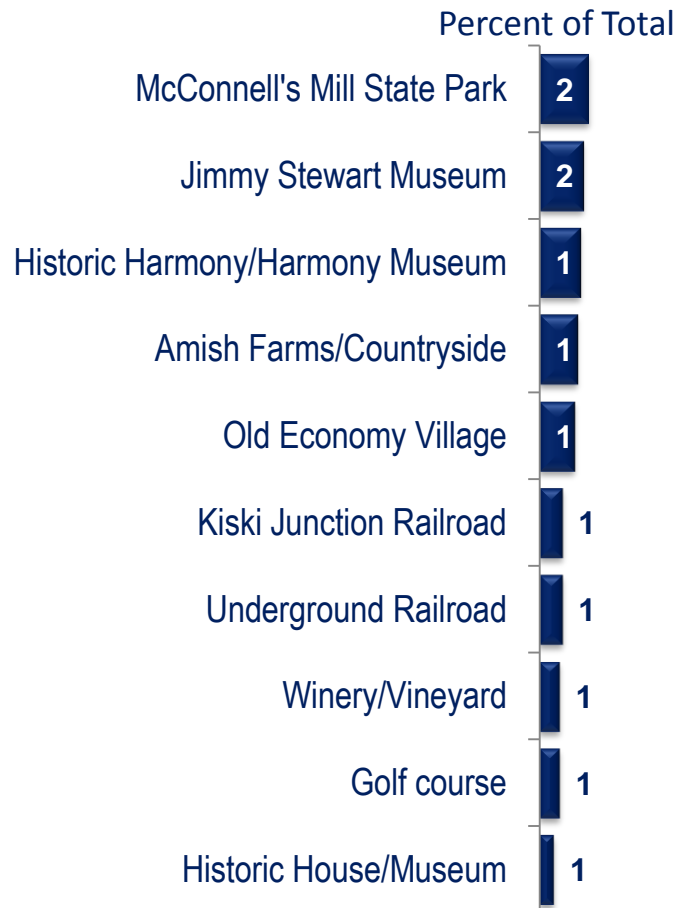
Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region* (Cont'd)



Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Laurel Highlands Region



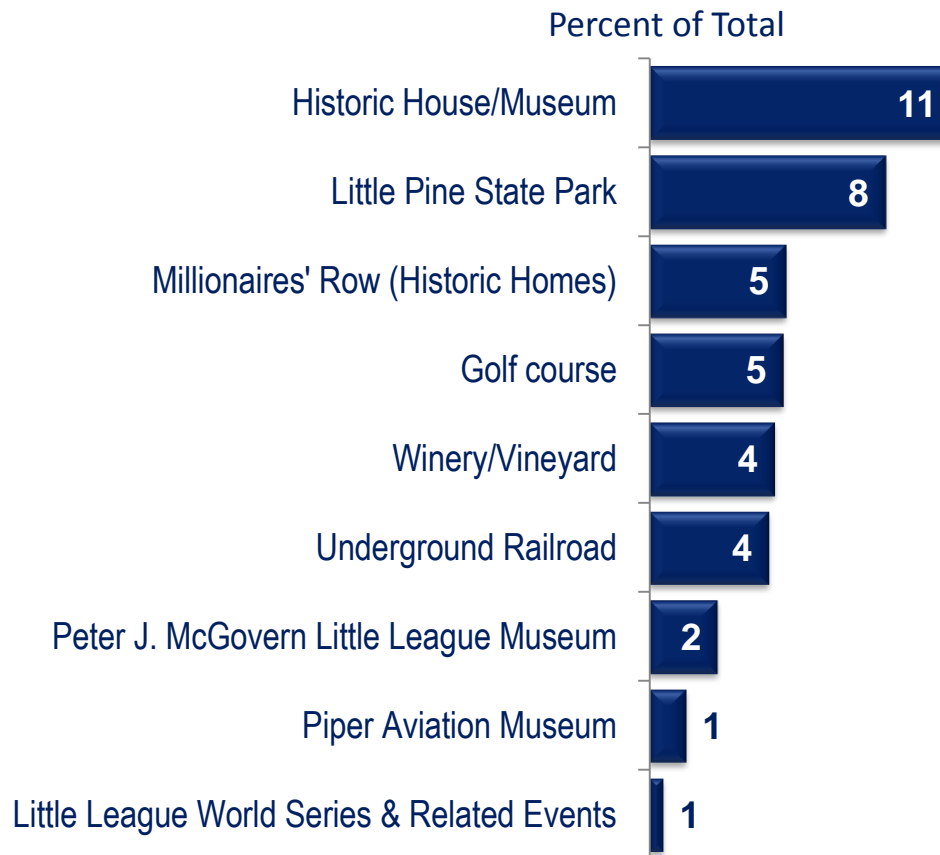
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



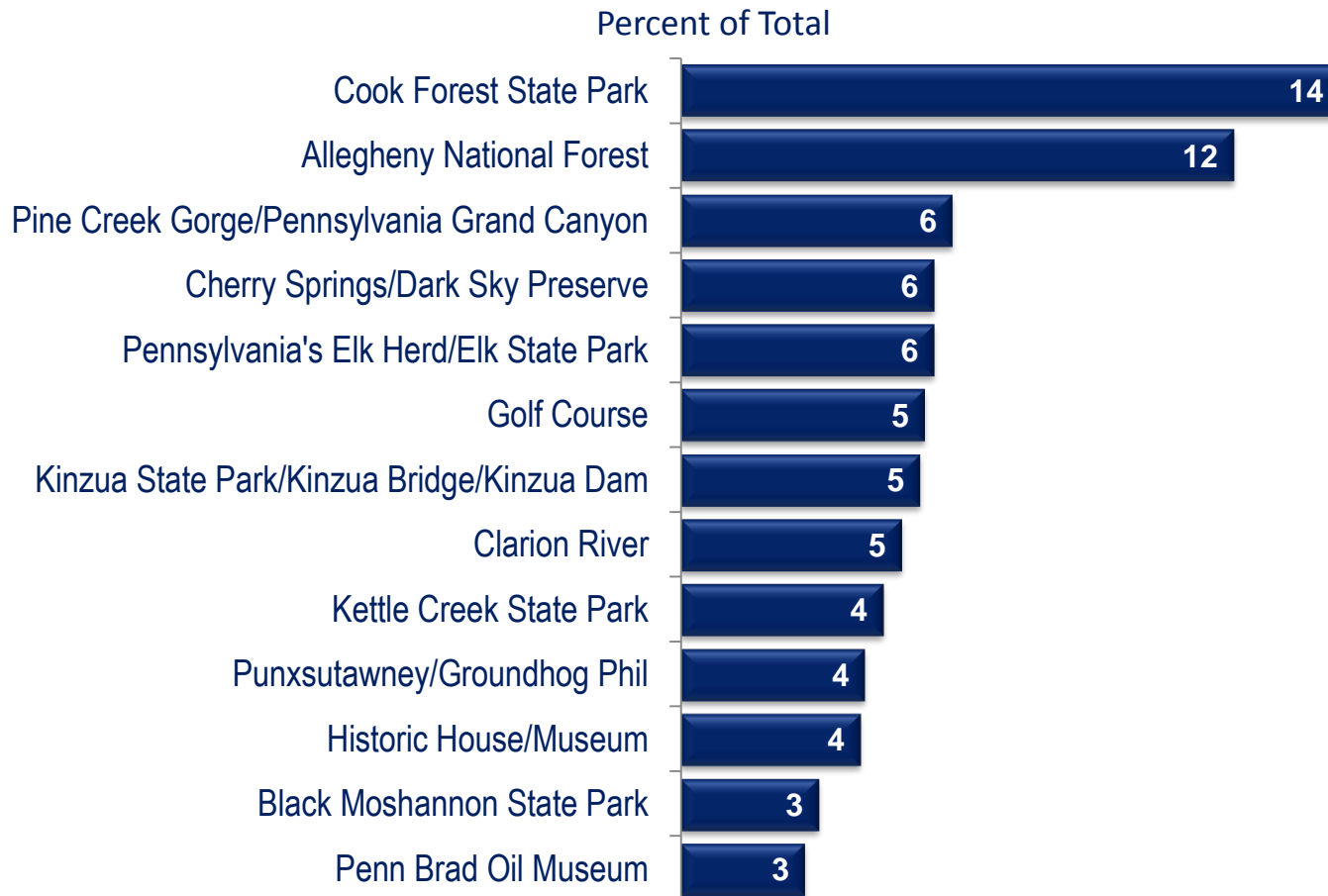
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region* (Cont'd)



Base: Overnight Trips



Pennsylvania Attractions/Events — Valleys of the Susquehanna Region*



Base: Overnight Trips

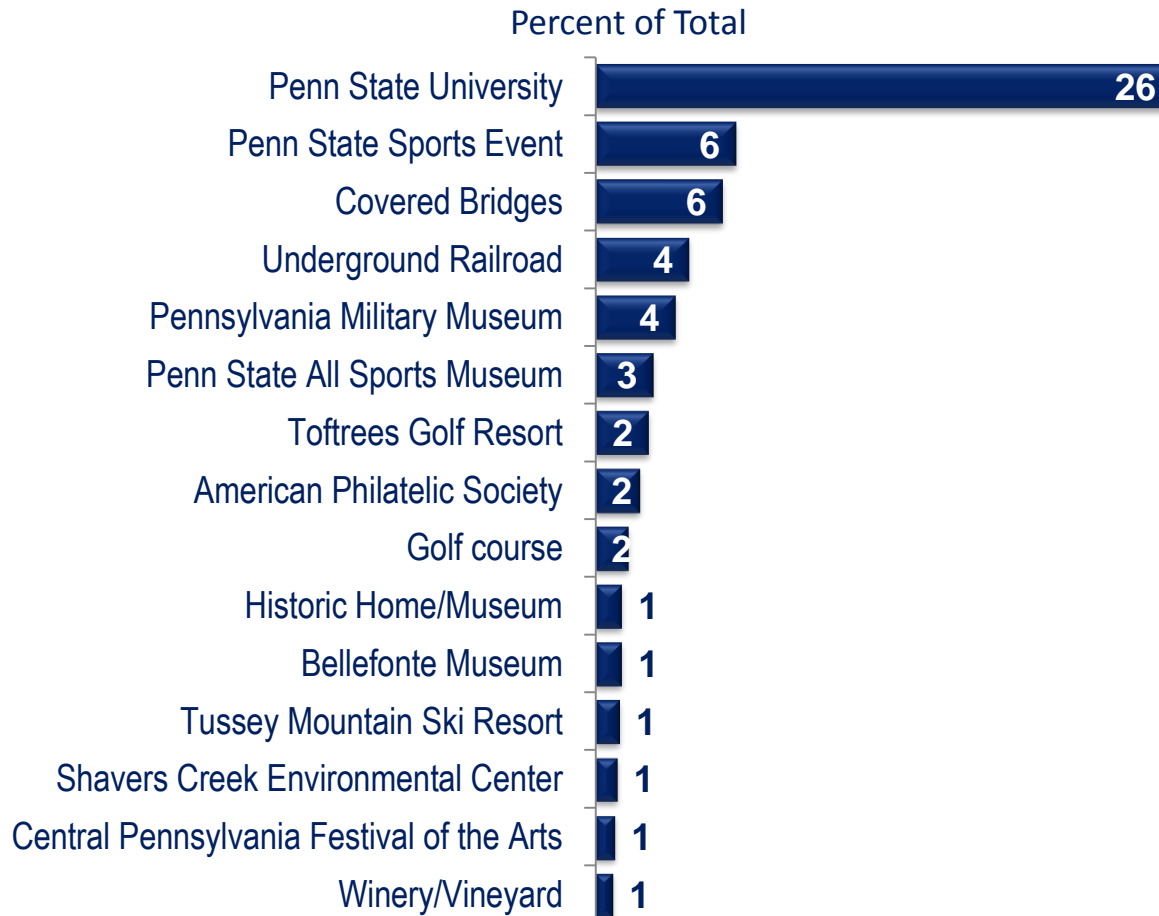
Percent of Total



Pennsylvania Attractions/Events — The Alleghenies Region*



Base: Overnight Trips

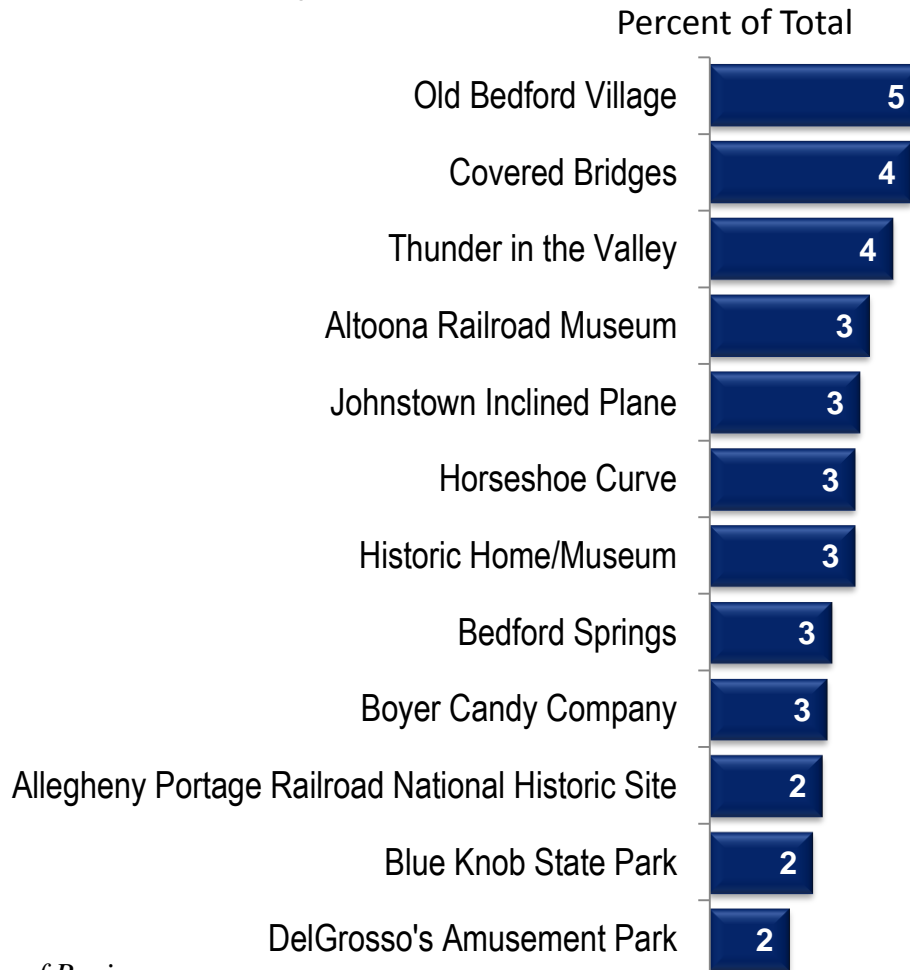


*State College Region

Pennsylvania Attractions/Events — The Alleghenies Region*



Base: Overnight Trips



*Remainder of Region

Pennsylvania Attractions/Events — The Alleghenies Region* (Cont'd)



Base: Overnight Trips

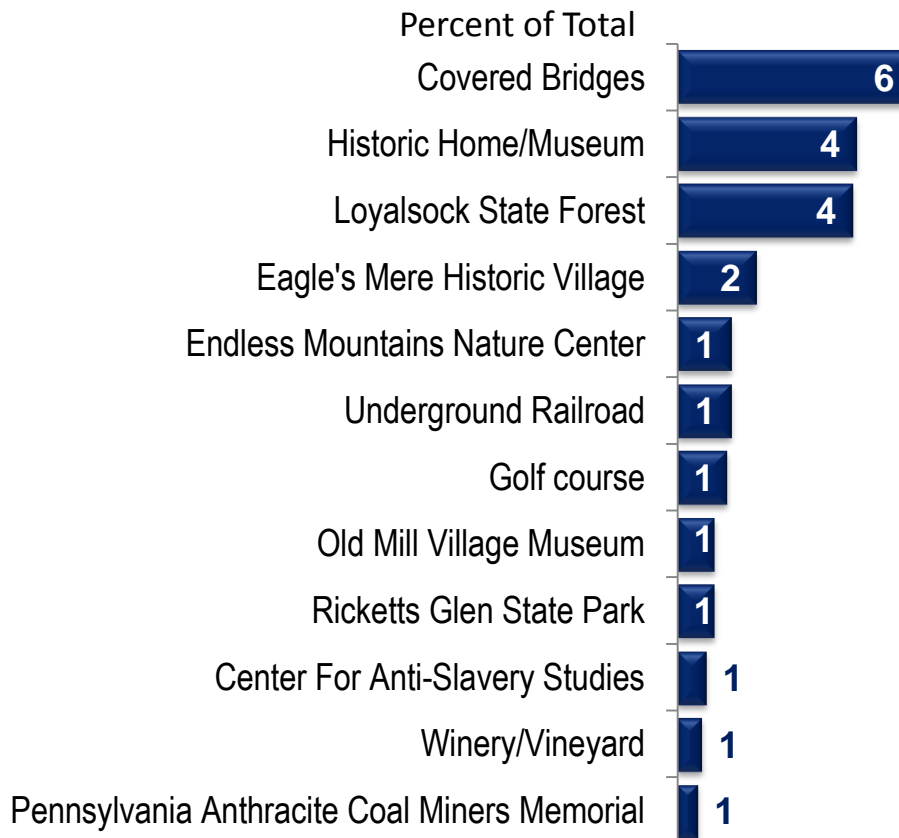


**Remainder of Region*

Pennsylvania Attractions/Events — Upstate PA Region*



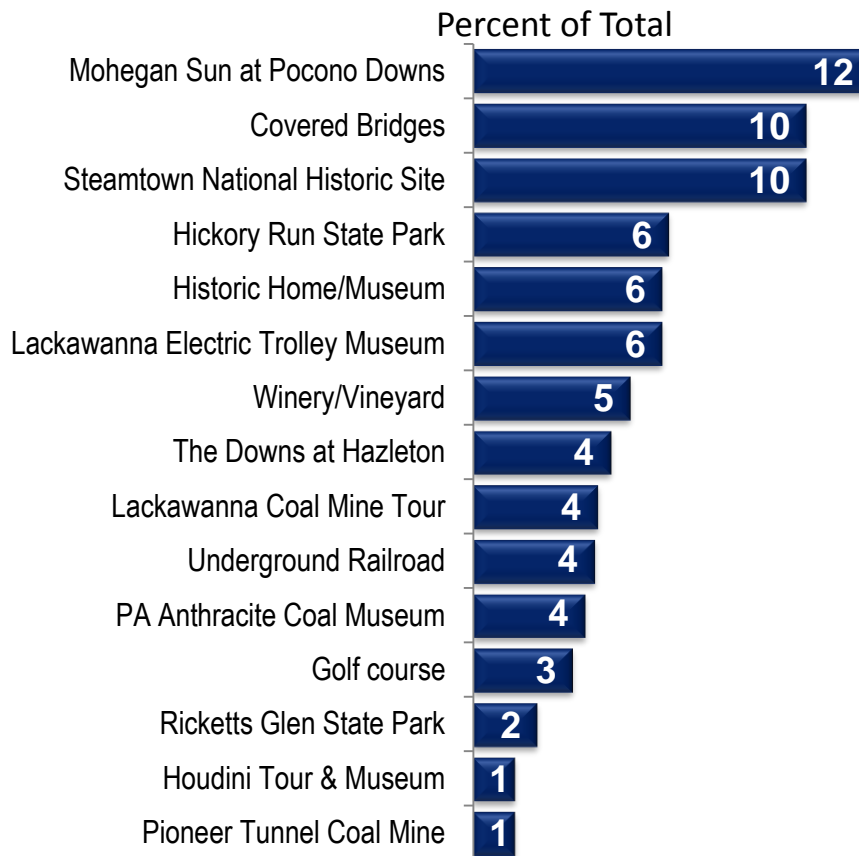
Base: Overnight Trips



Pennsylvania Attractions/Events — Upstate PA Region*



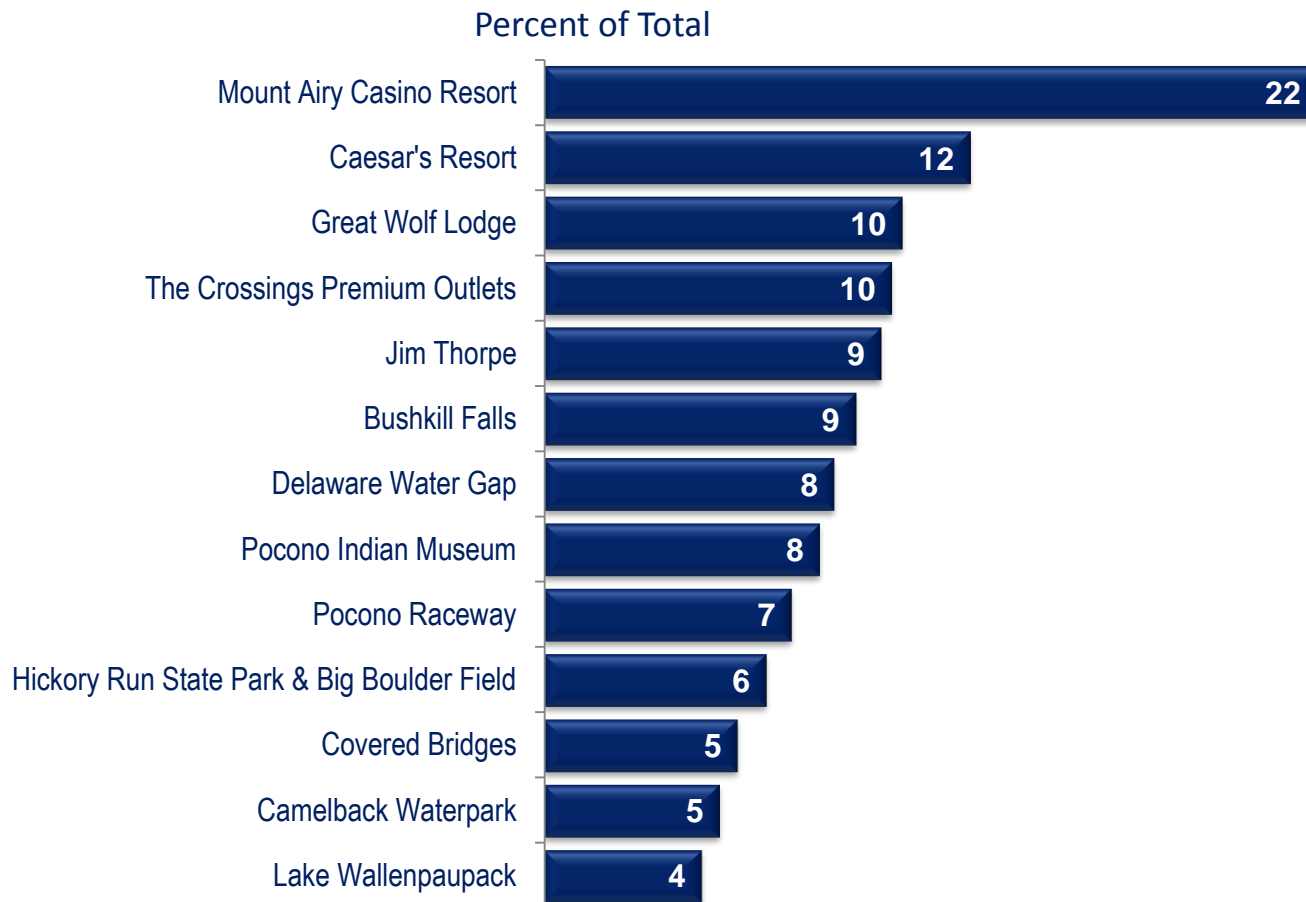
Base: Overnight Trips



Pennsylvania Attractions/Events — Pocono Mountains Region



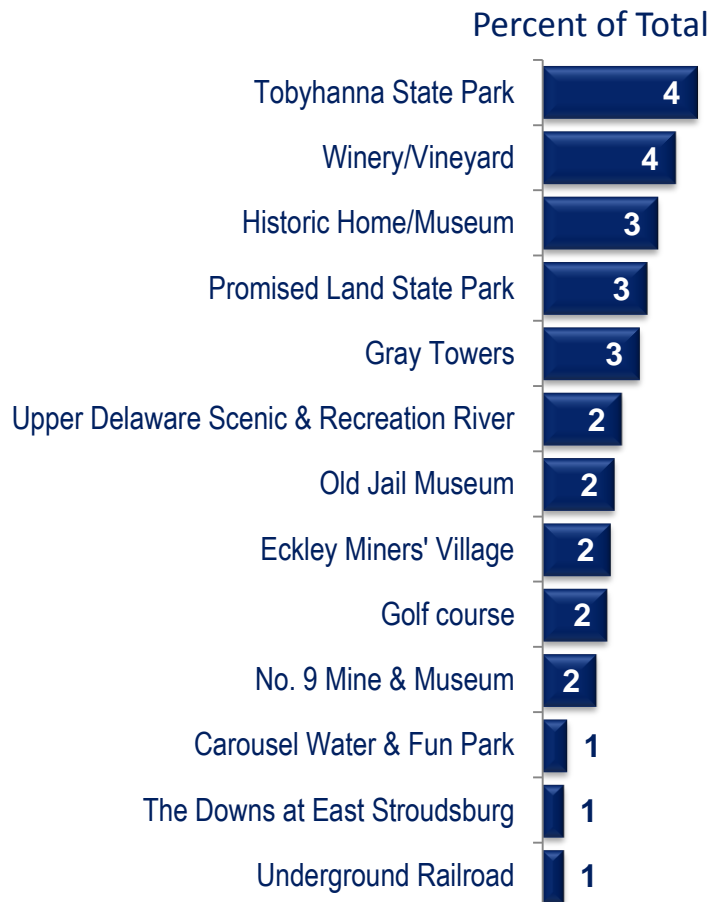
Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Pocono Mountains Region (Cont'd)



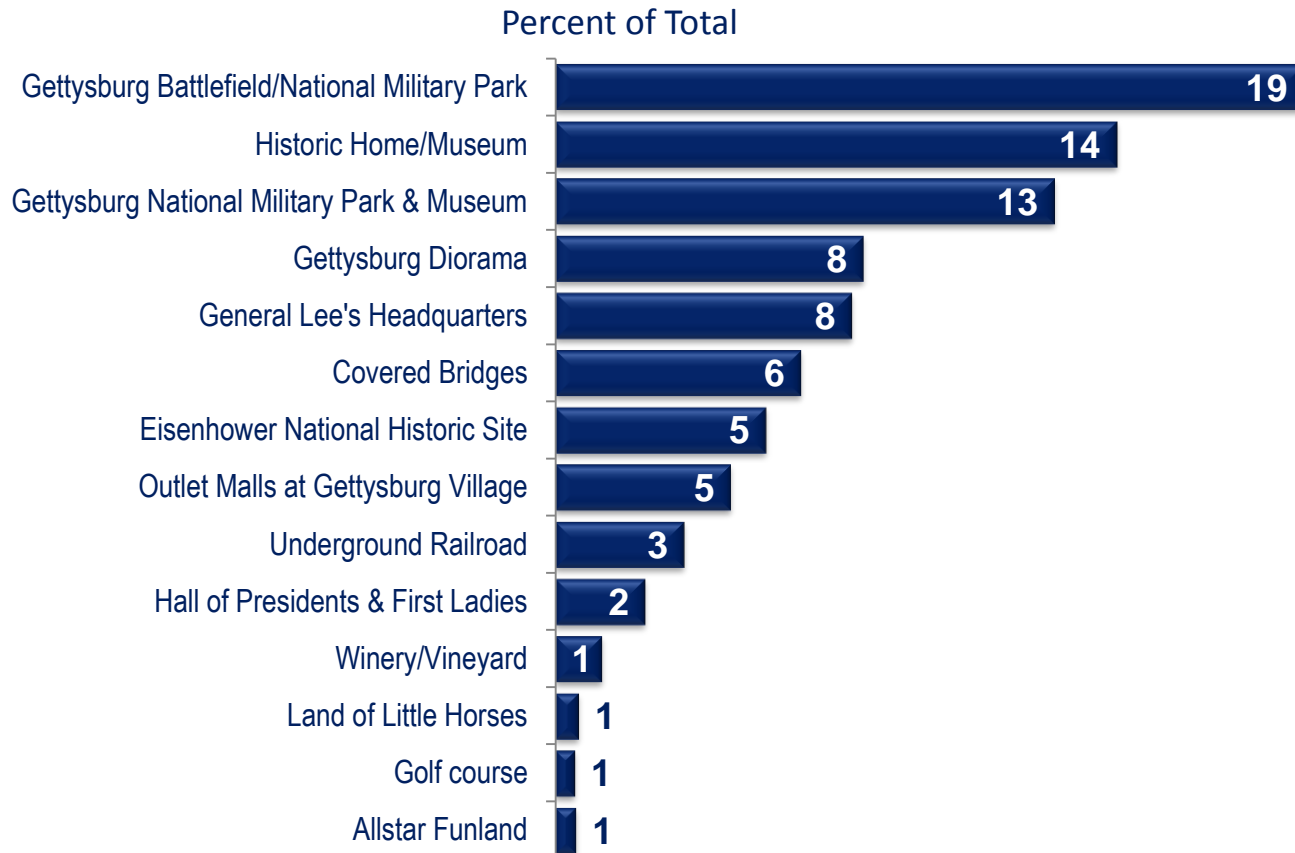
Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Marketable Overnight Trips

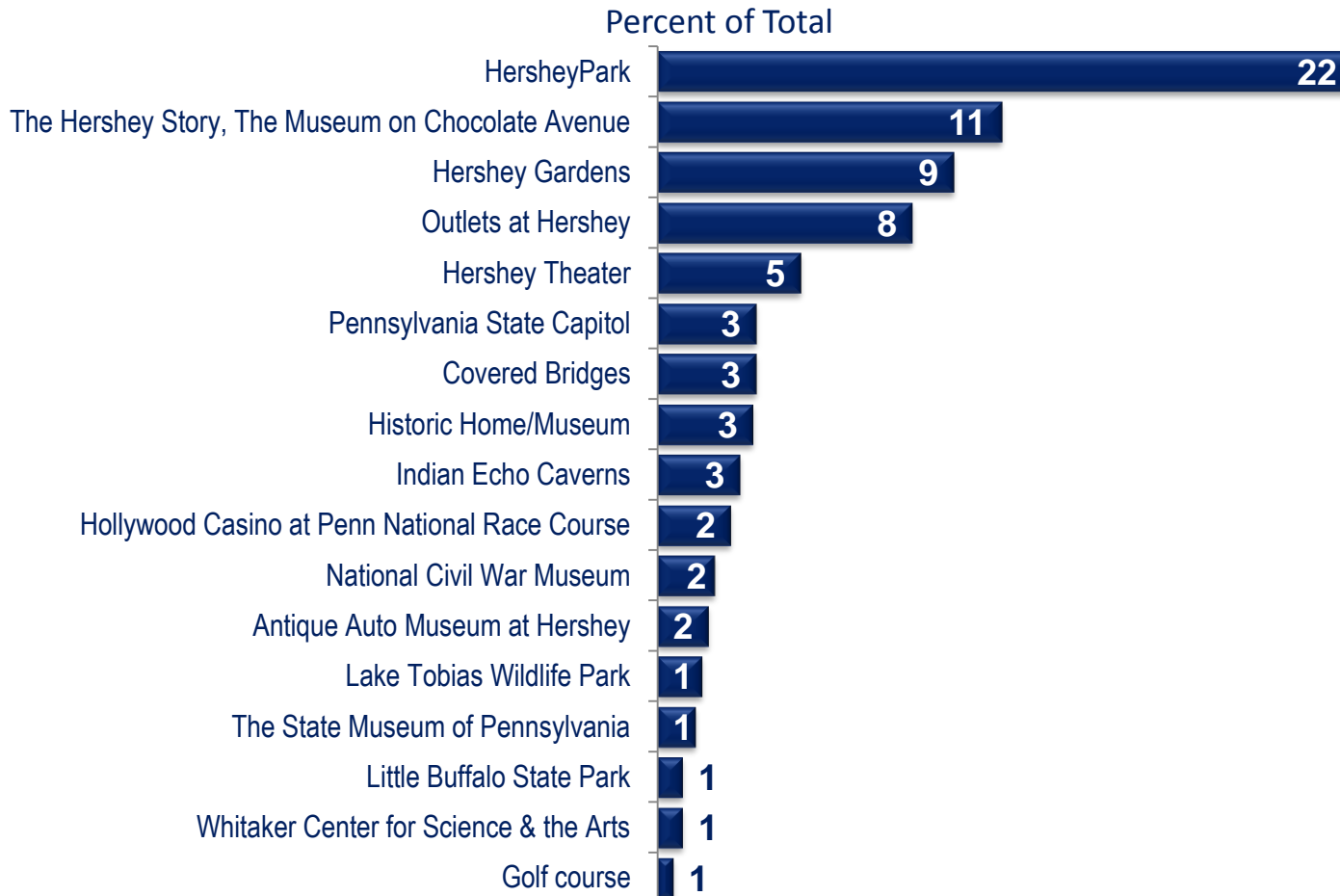


*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net combined attendance of 21%.

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Marketable Overnight Trips

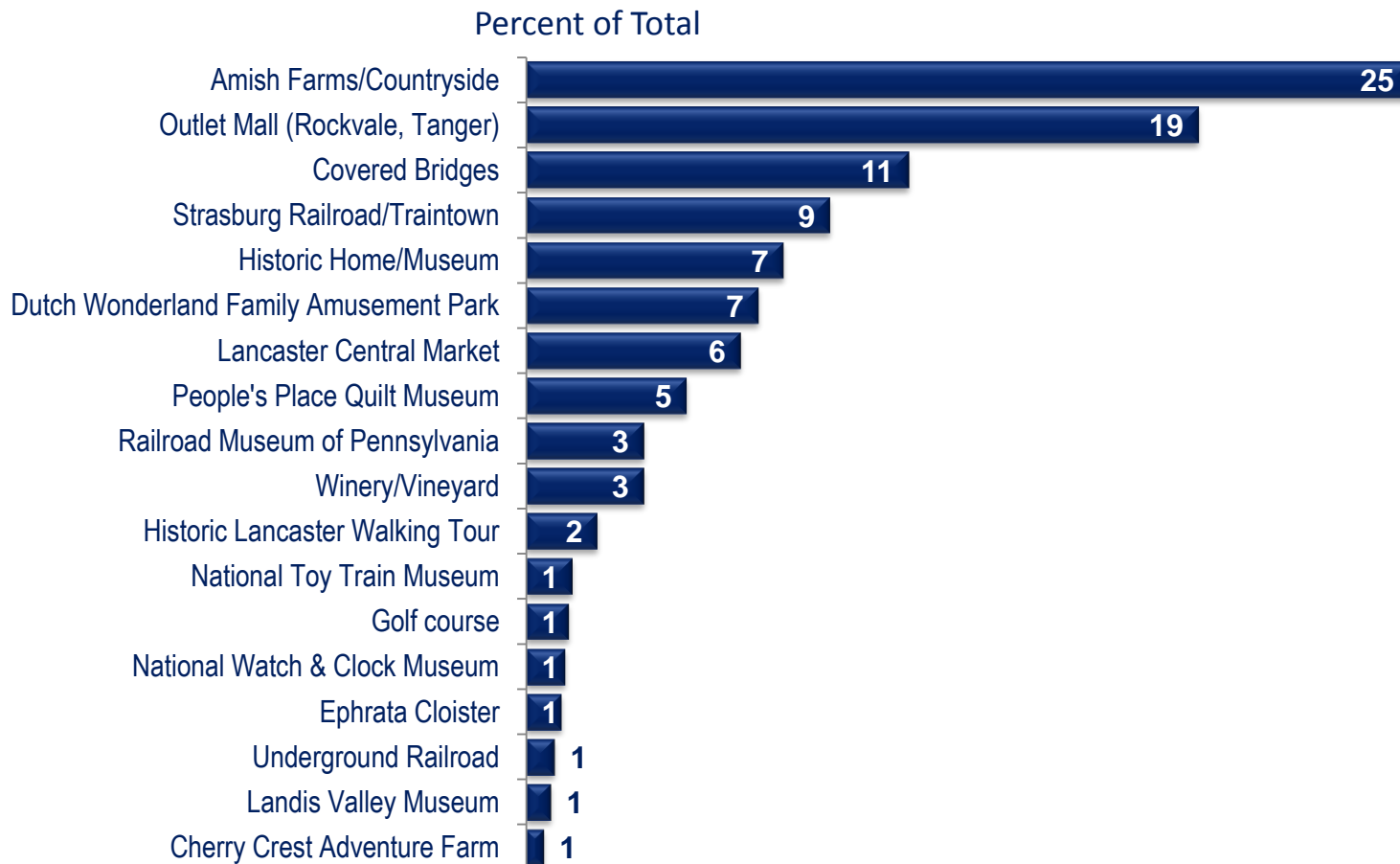


* Harrisburg/Hershey Area

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region*



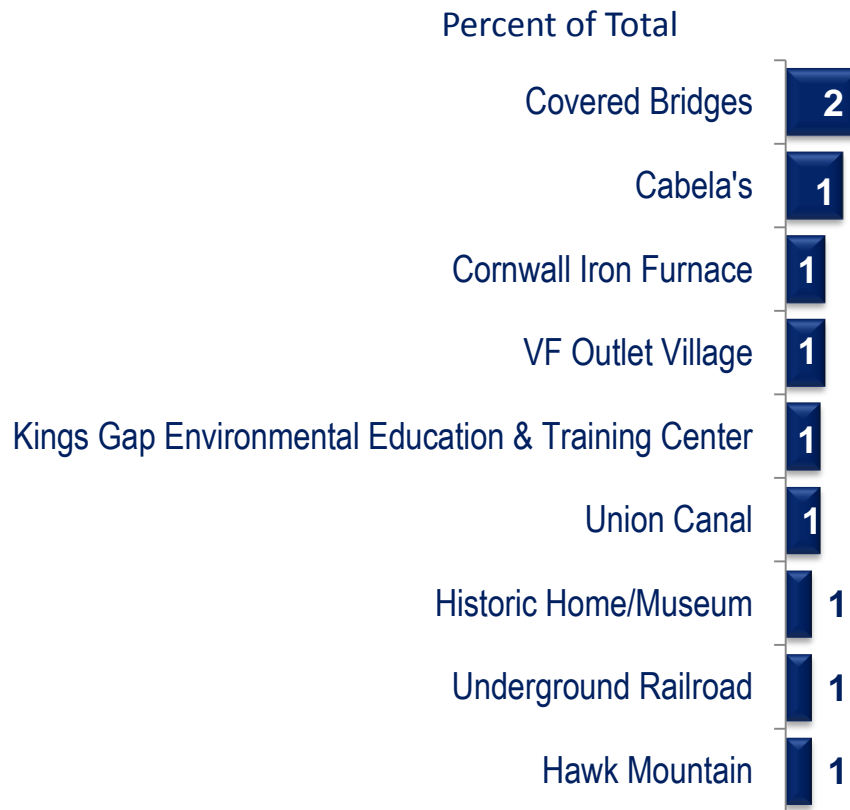
Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Marketable Overnight Trips

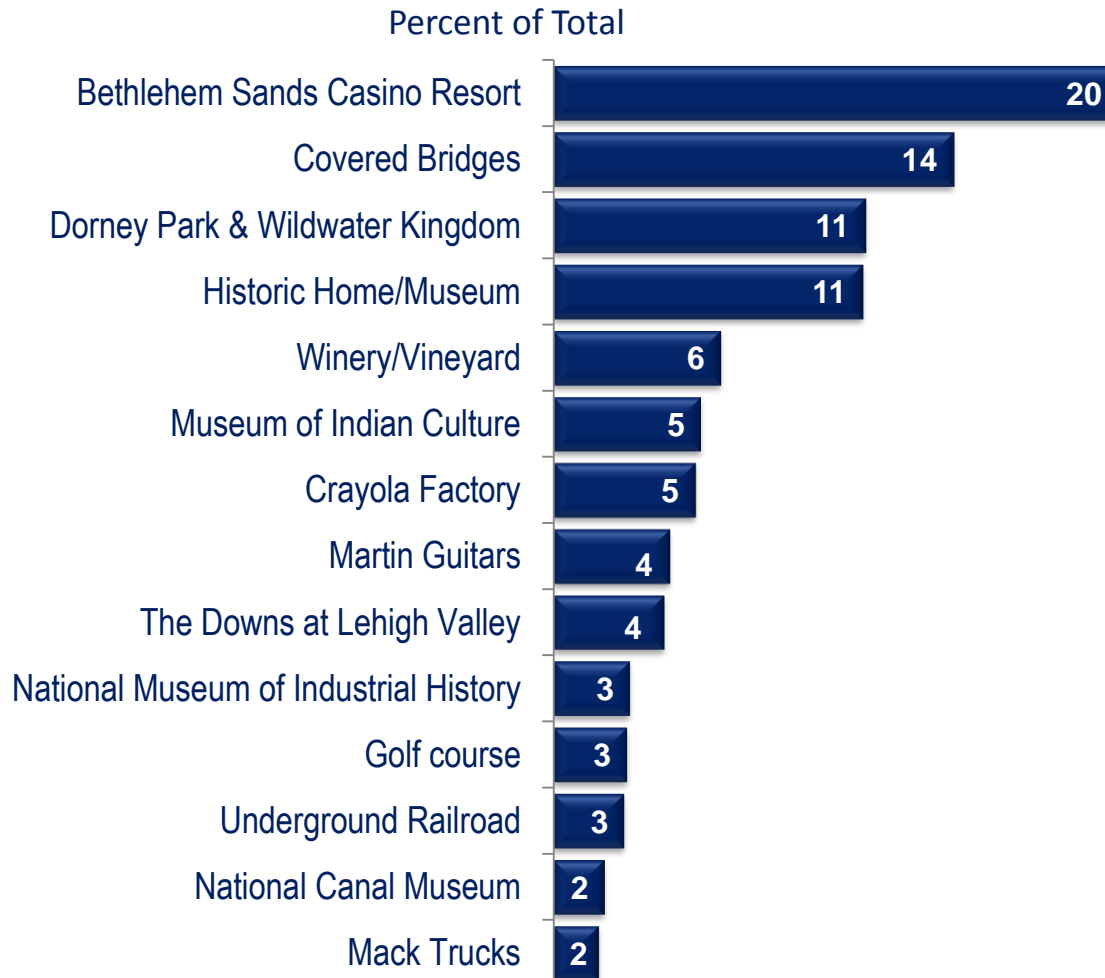


*Remainder of region

Pennsylvania Attractions/Events — Lehigh Valley Region



Base: Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Marketable Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Marketable Overnight Trips

Percent of Total



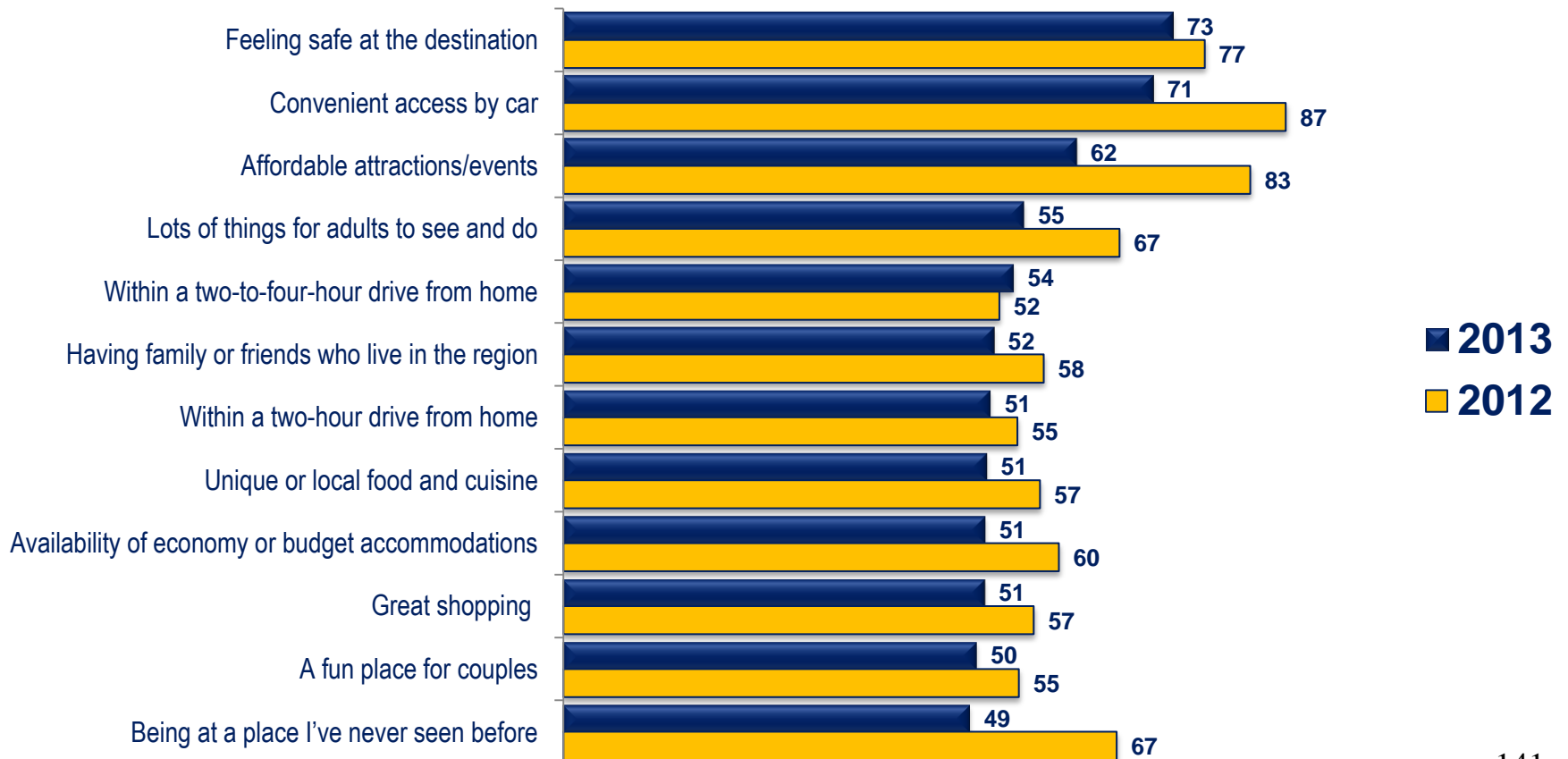
Importance of Factors in Choice of Pennsylvania Tourism Region

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



Base: Overnight Trips

% Rating Factor As Very Important*



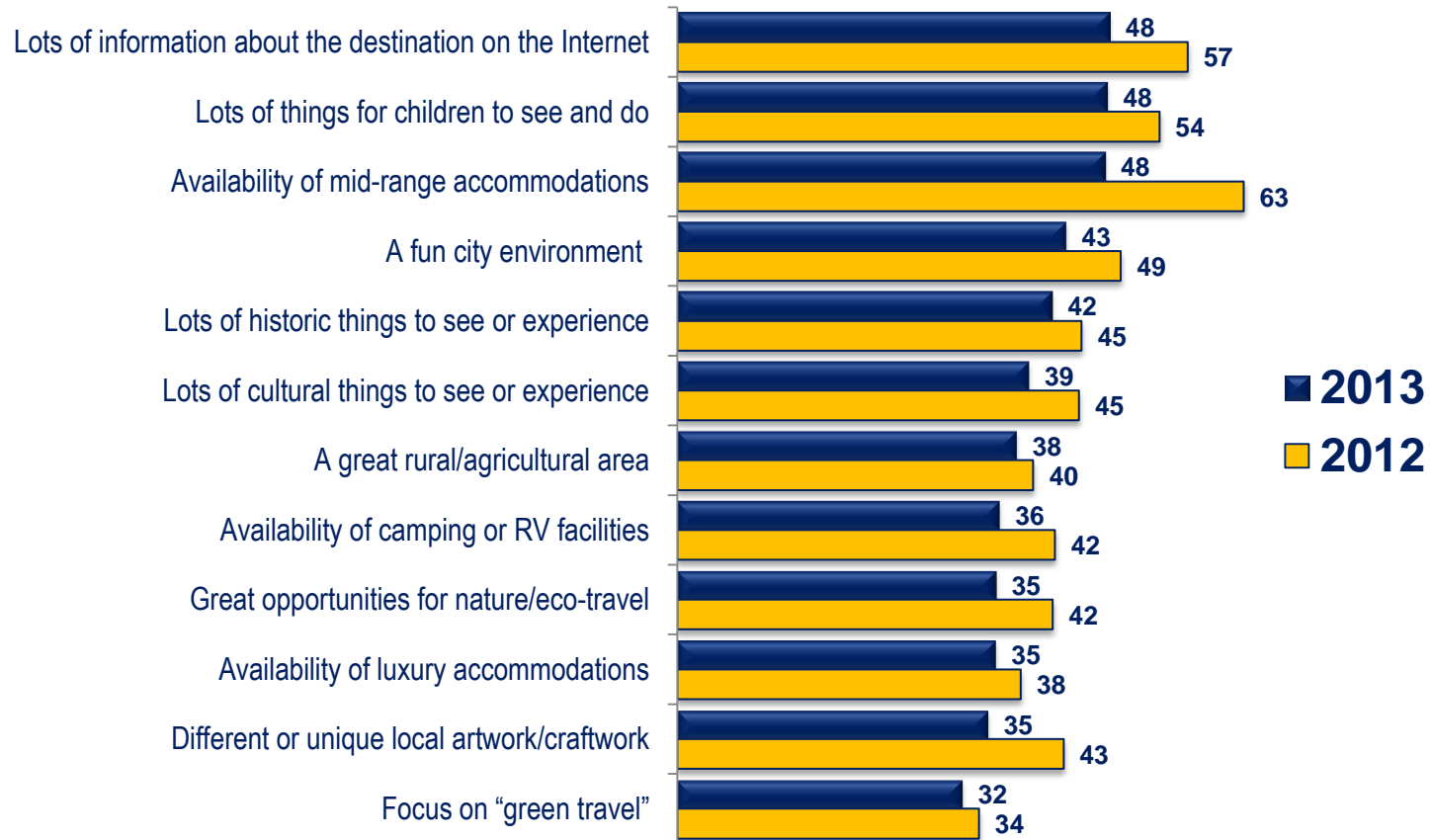
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



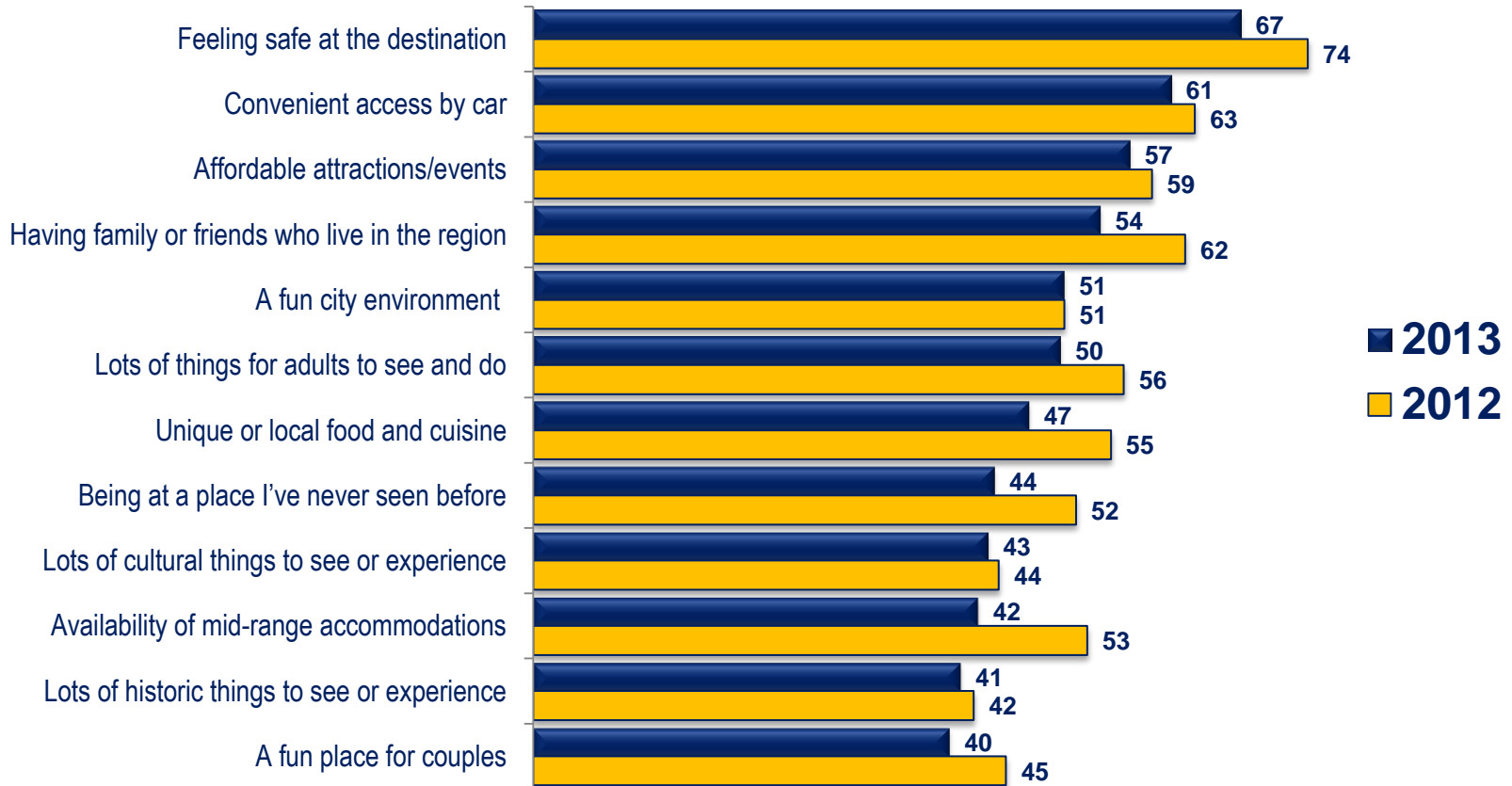
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pittsburgh & Its Countryside



Base: Overnight Trips

% Rating Factor As Very Important*



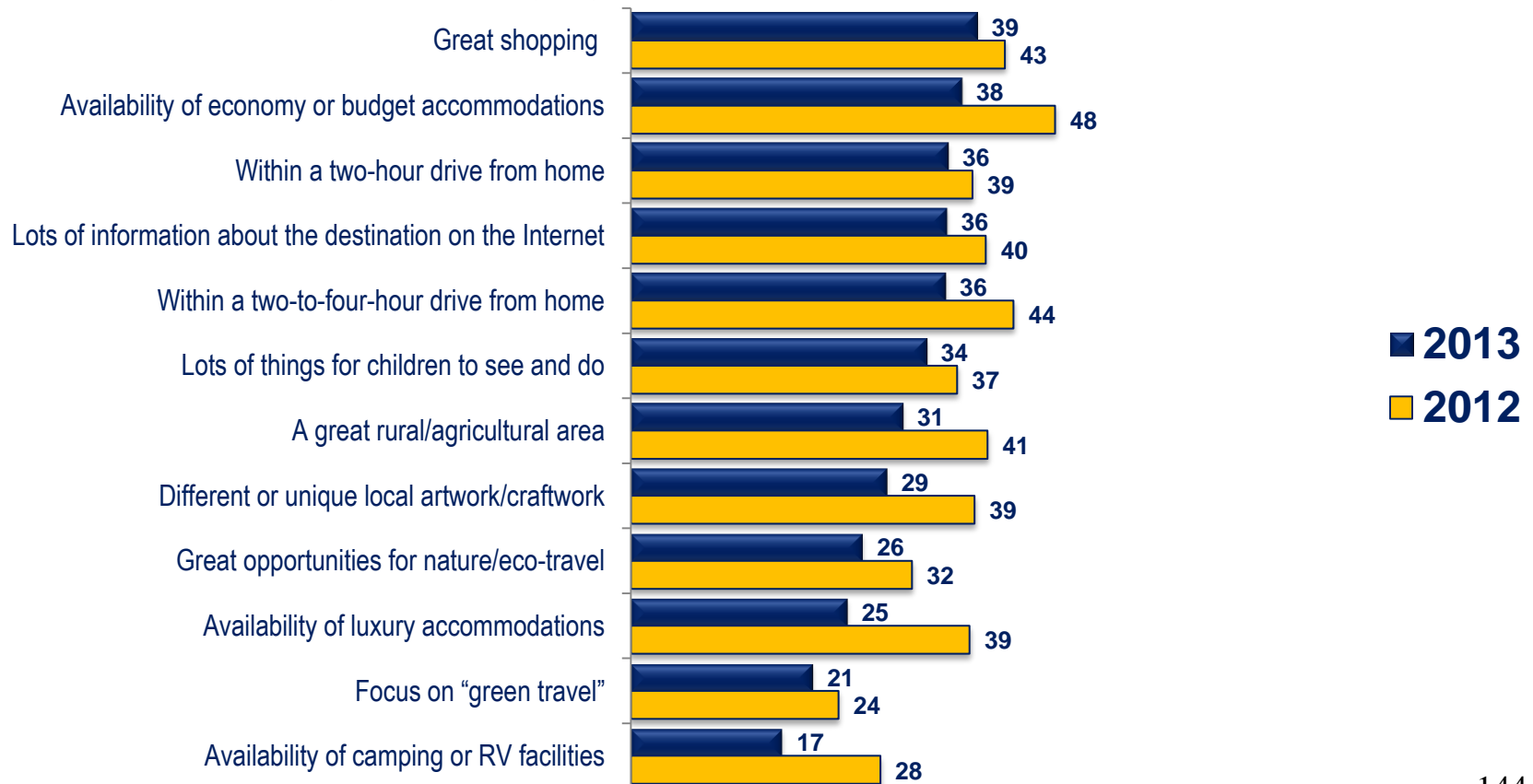
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



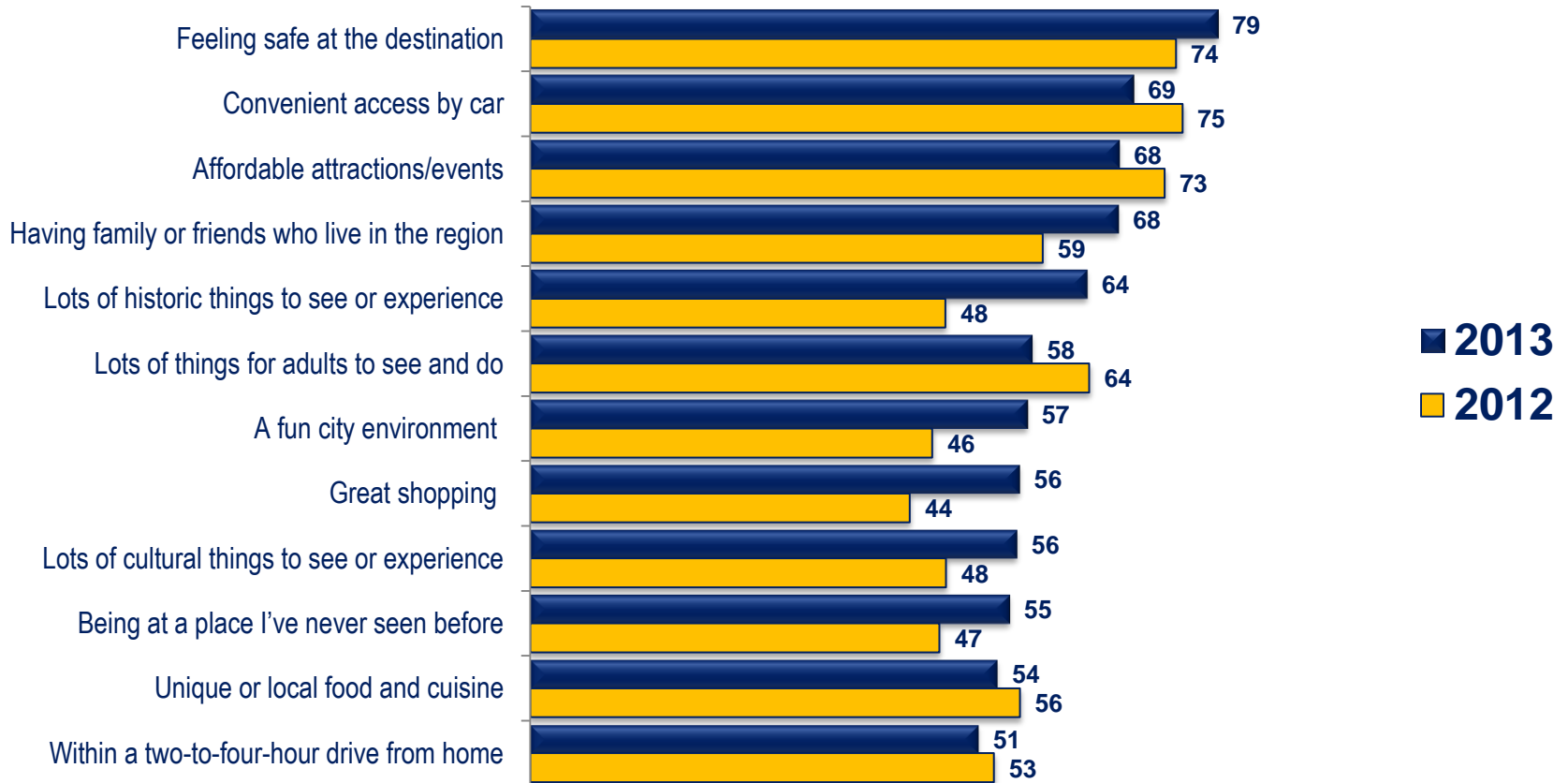
* Rated 8, 9 or 10 on 10-pt. Importance scale

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

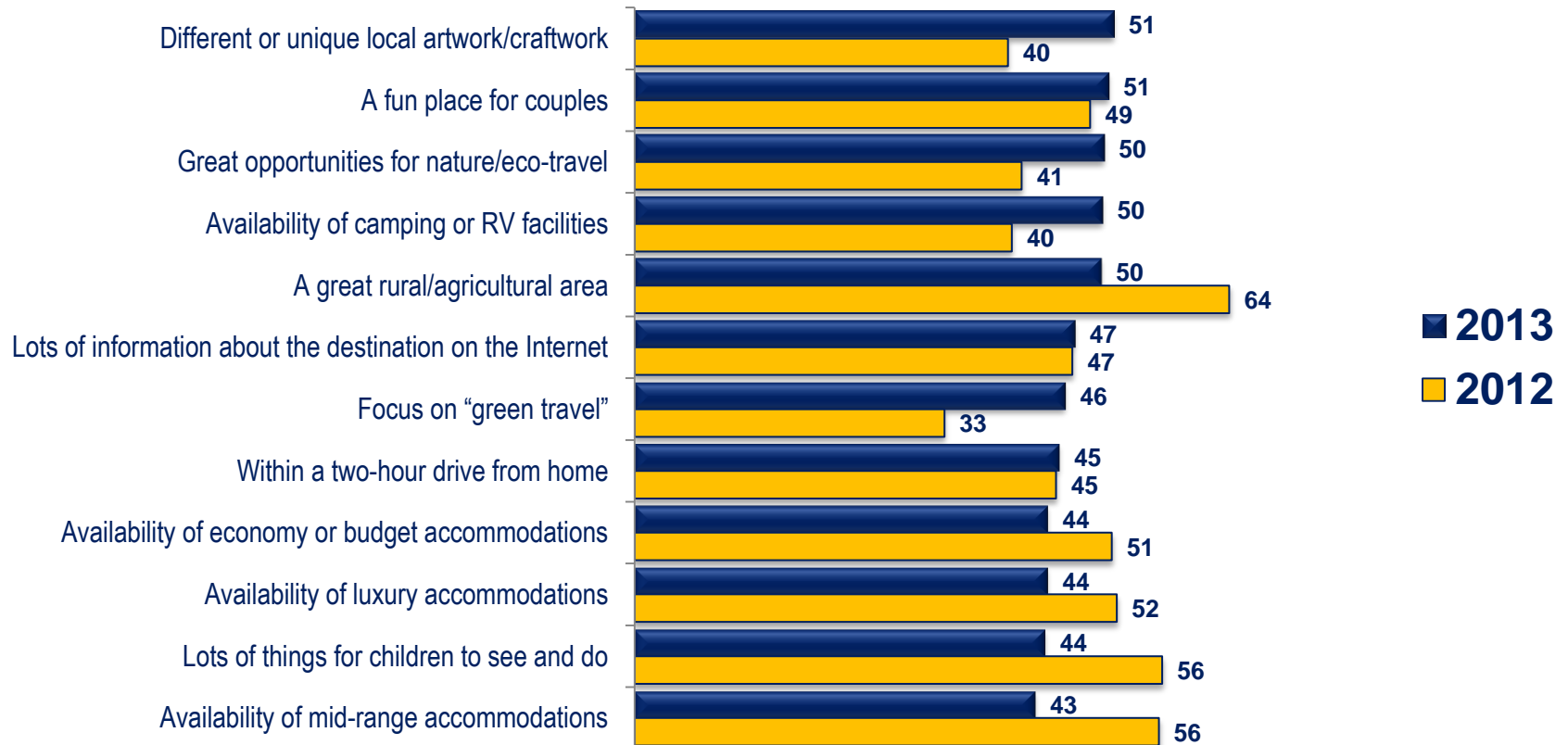
**Caution: low base*

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

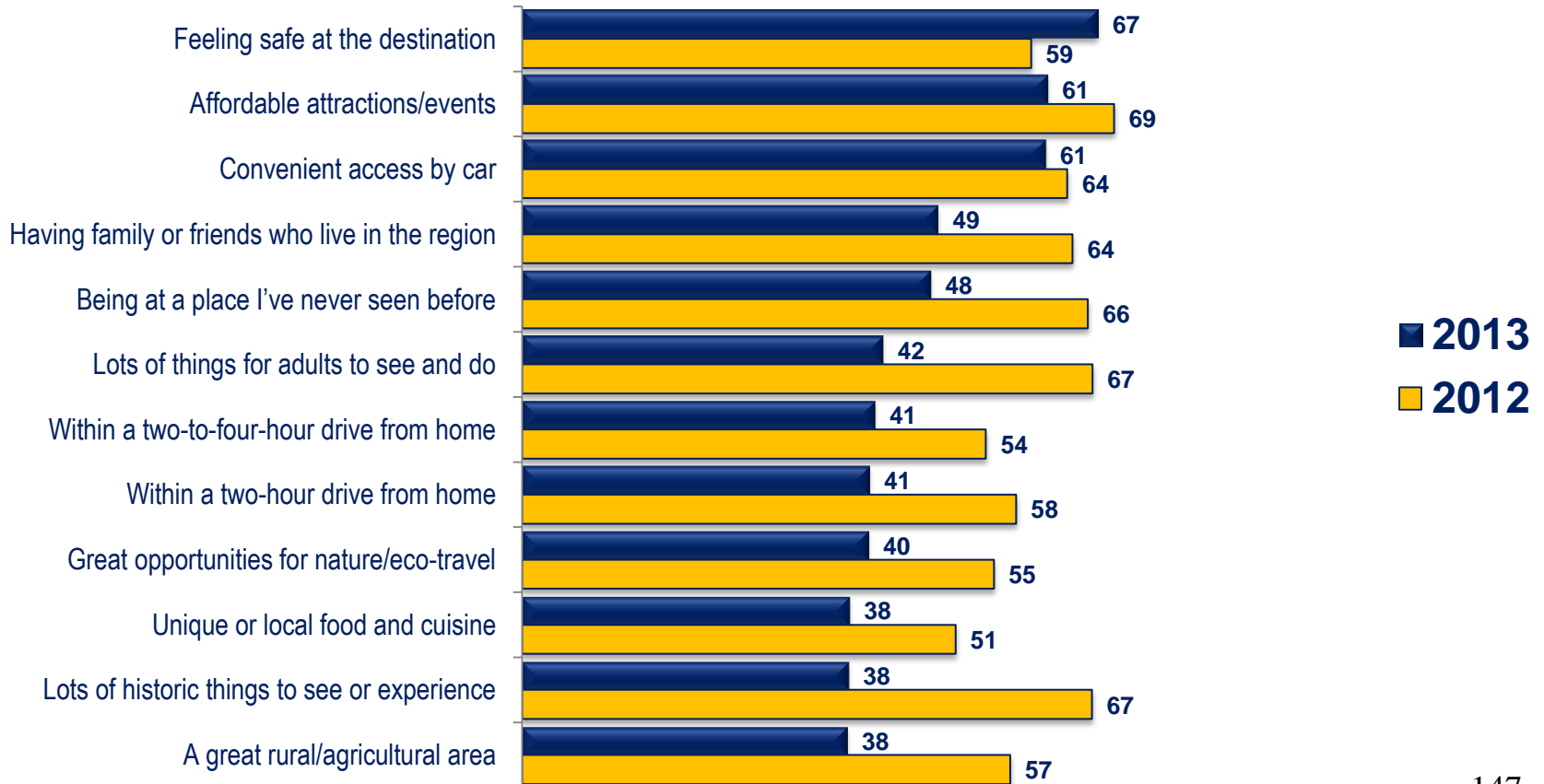
**Caution: low base*

Importance of Factors In Choosing to Visit Pennsylvania Wilds



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2013
■ 2012

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

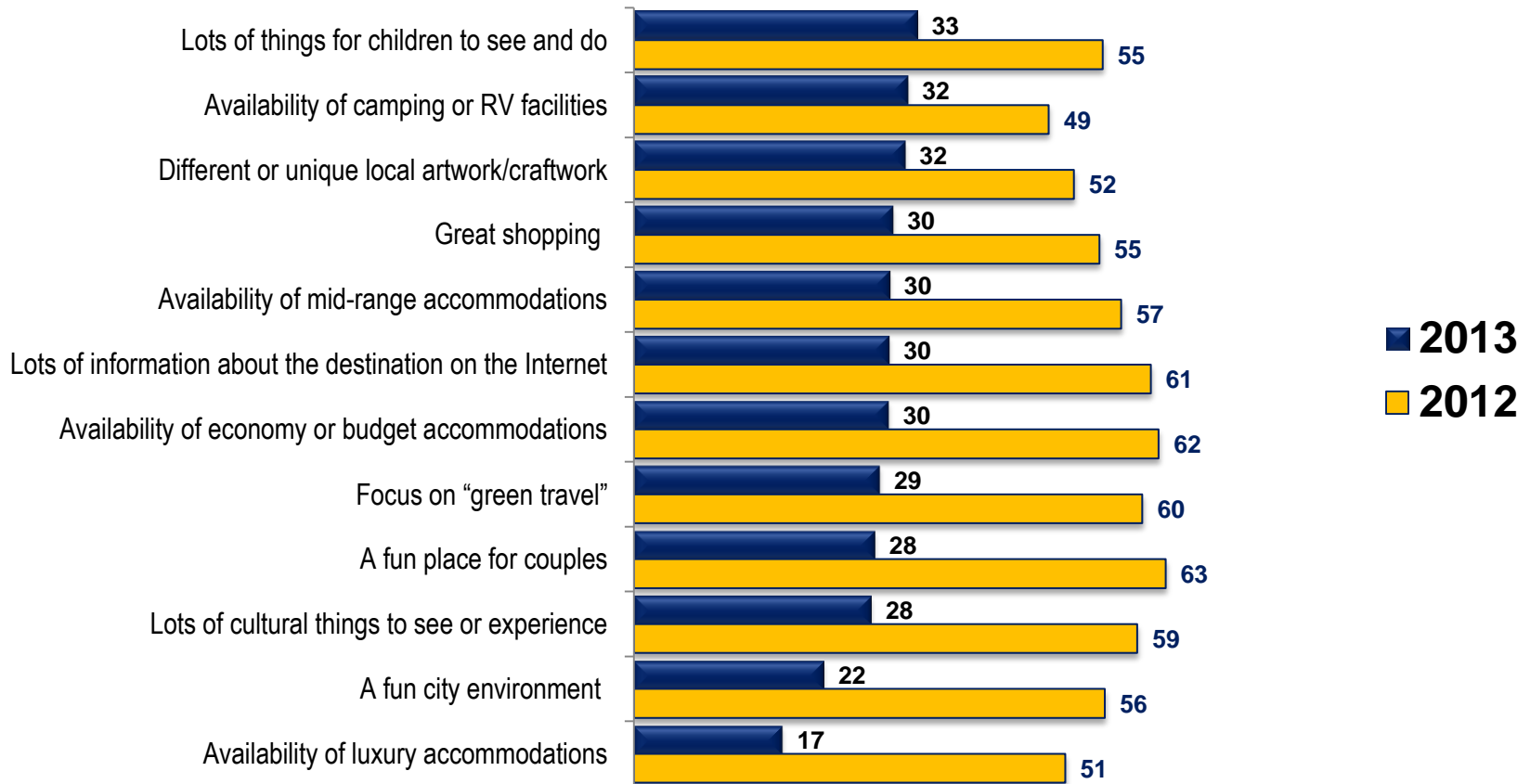
* Caution - low base size.

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



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2013
■ 2012

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

* Caution - low base size.

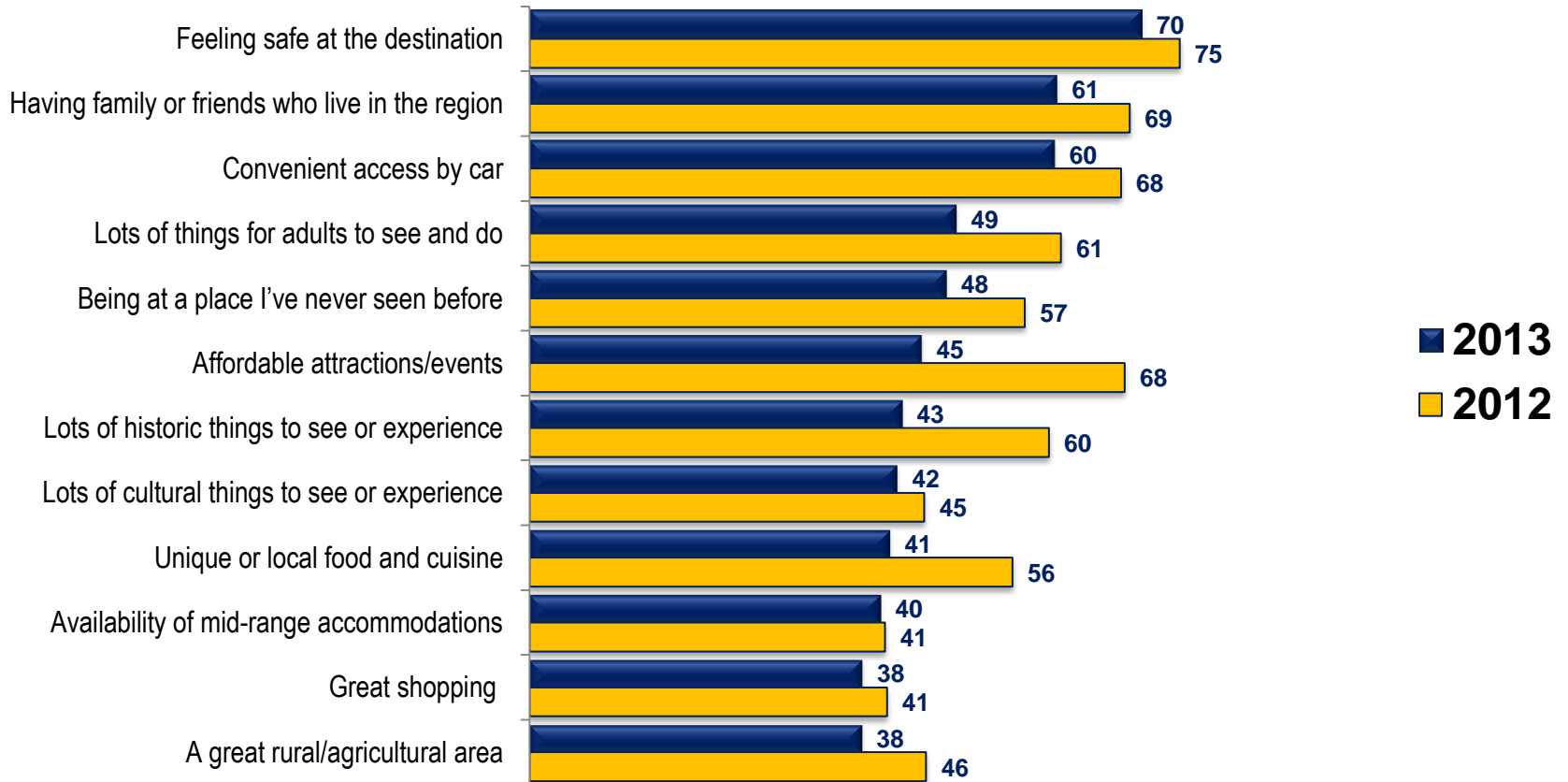
**Caution: low base*

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

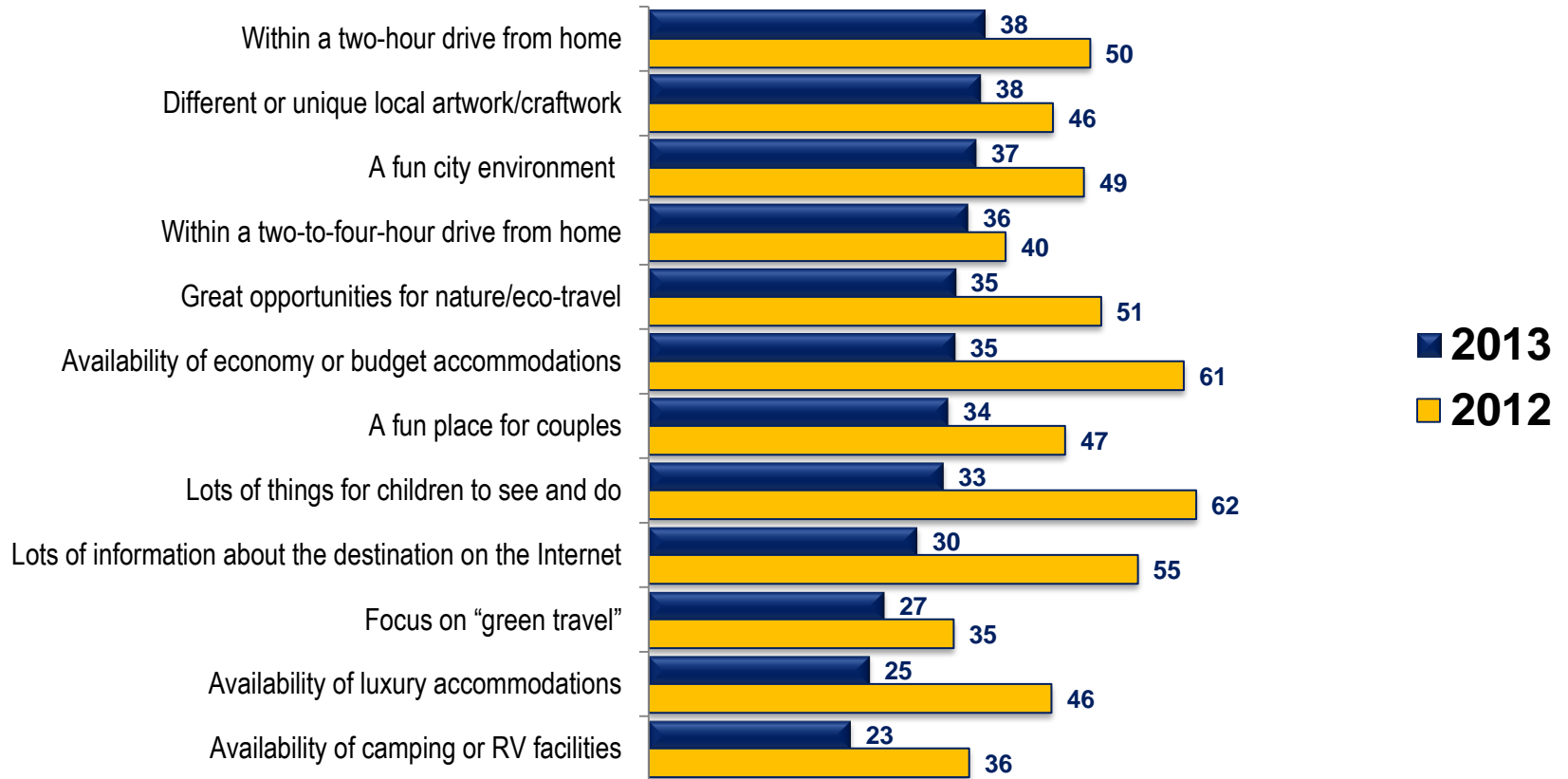
**Caution: low base*

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

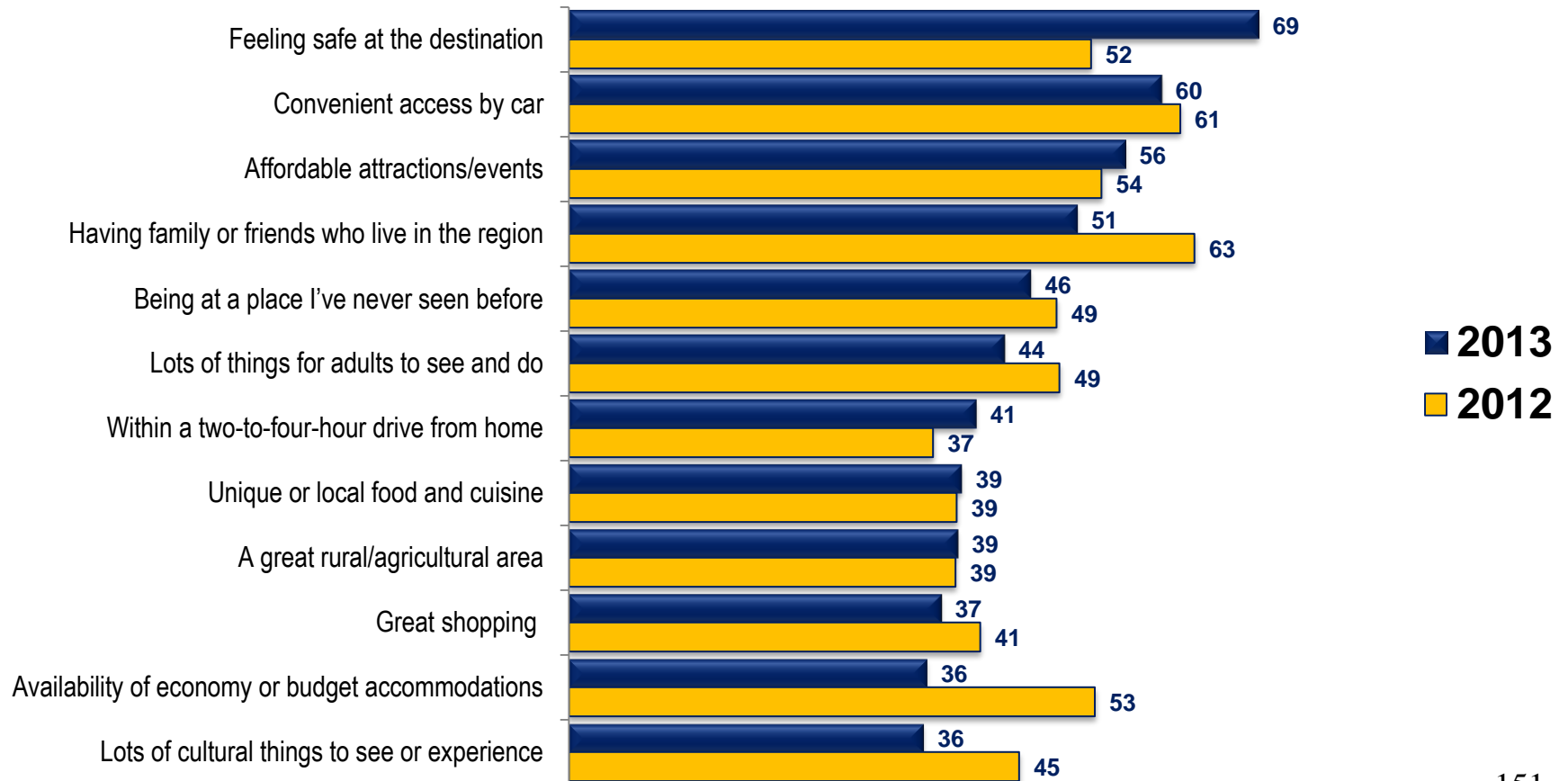
**Caution: low base*

Importance of Factors In Choosing to Visit The Alleghenies Region



Base: Overnight Trips

% Rating Factor As Very Important*



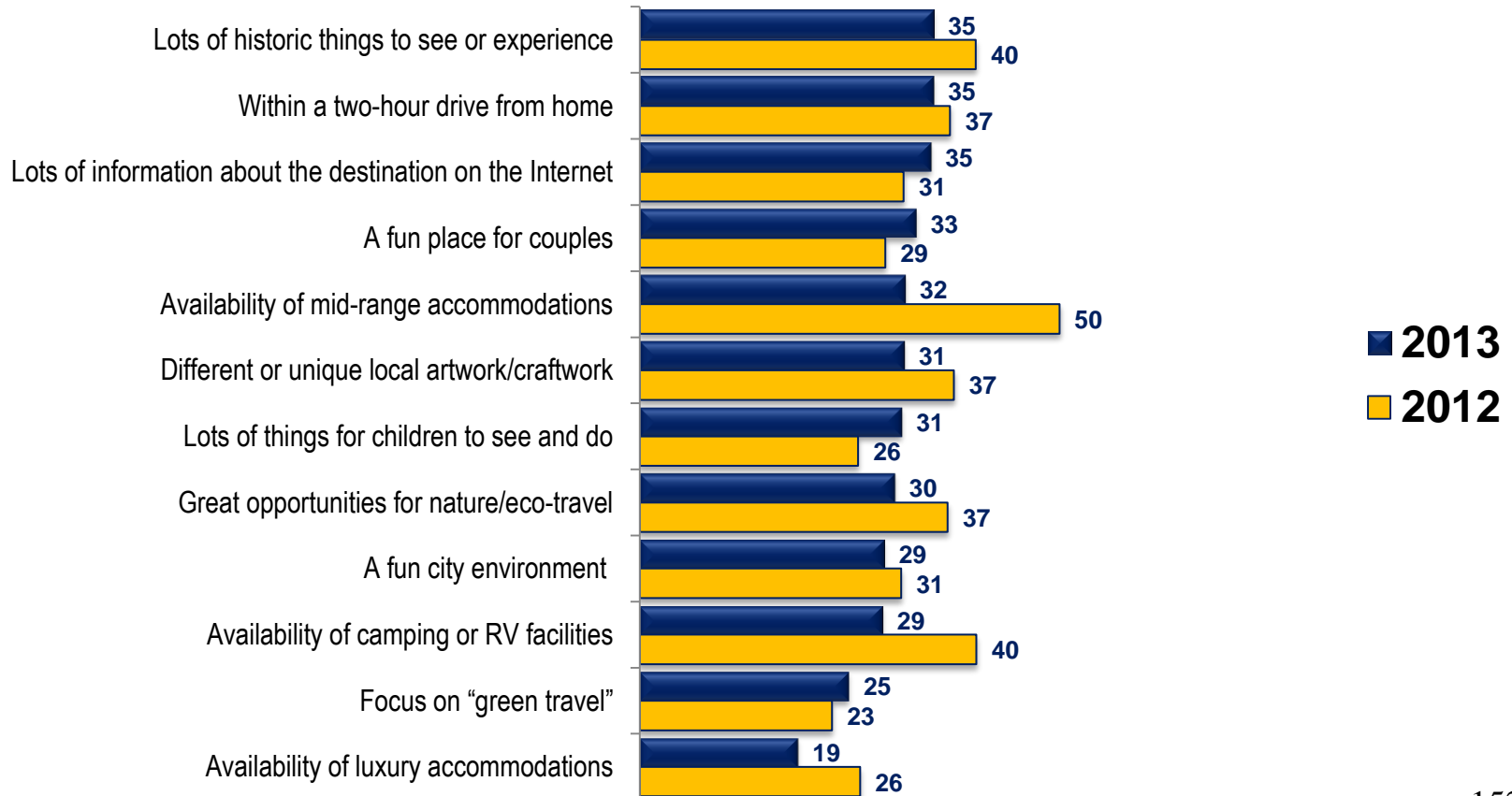
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



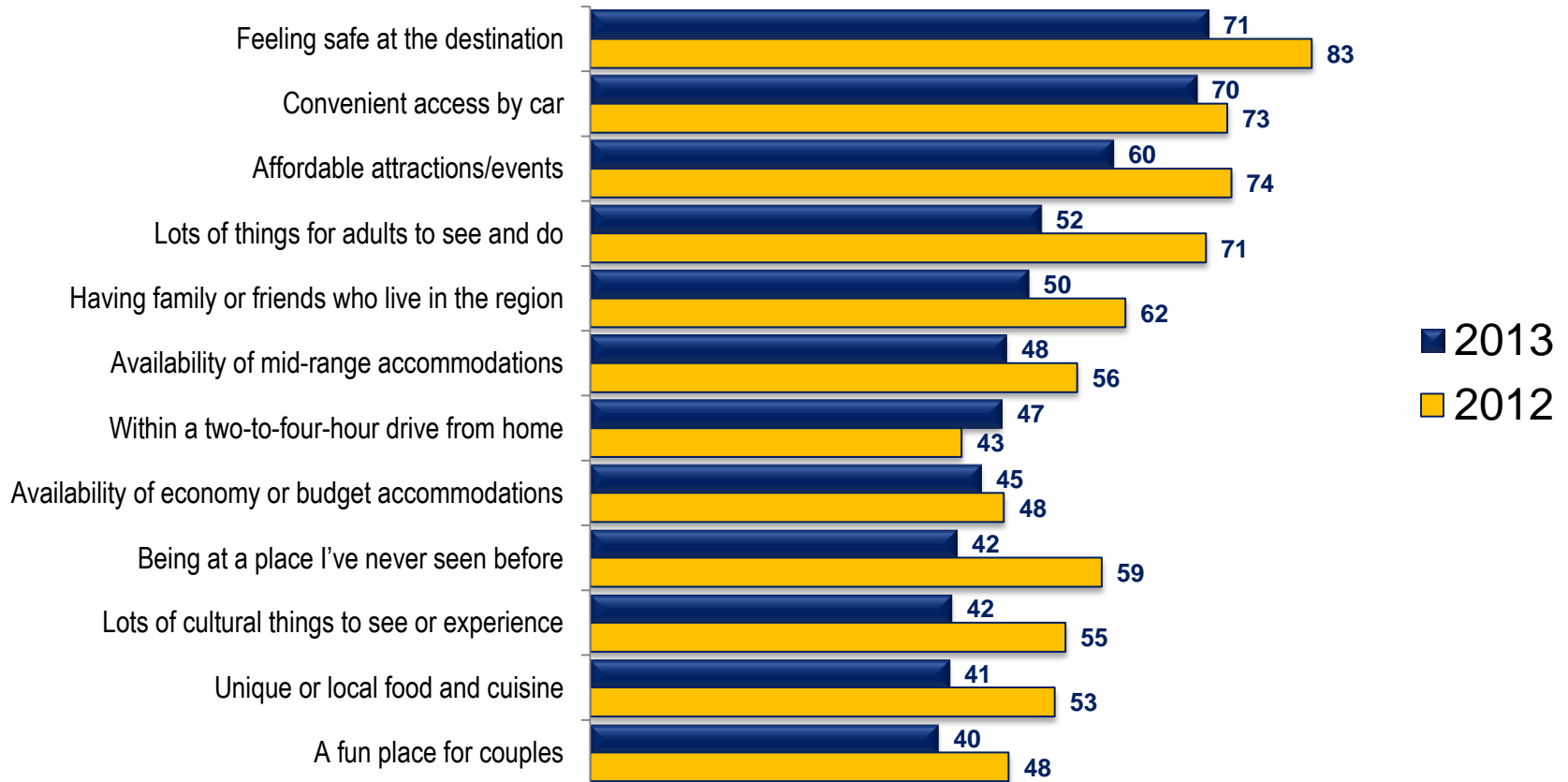
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Upstate PA



Base: Overnight Trips

% Rating Factor As Very Important*



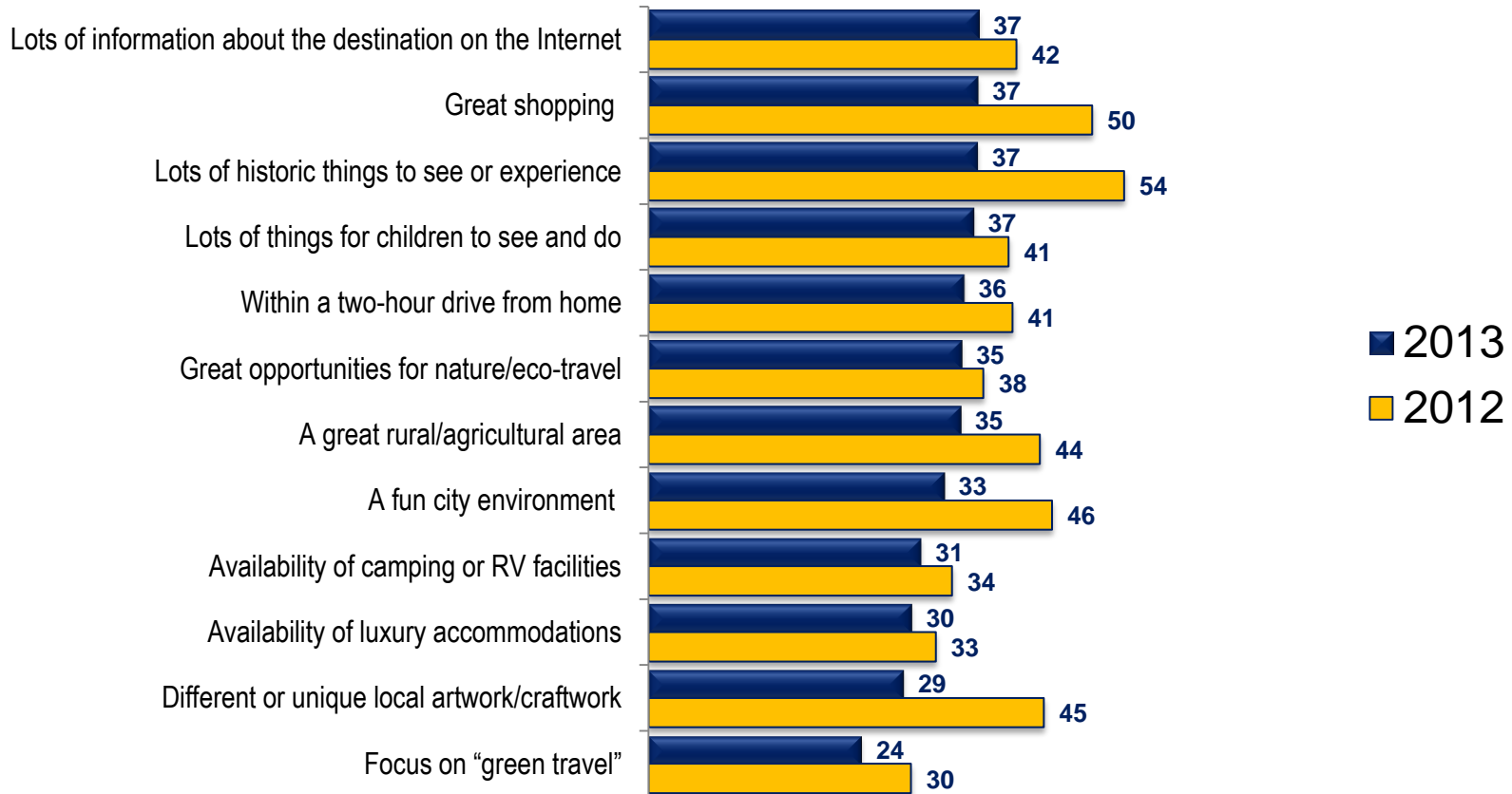
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



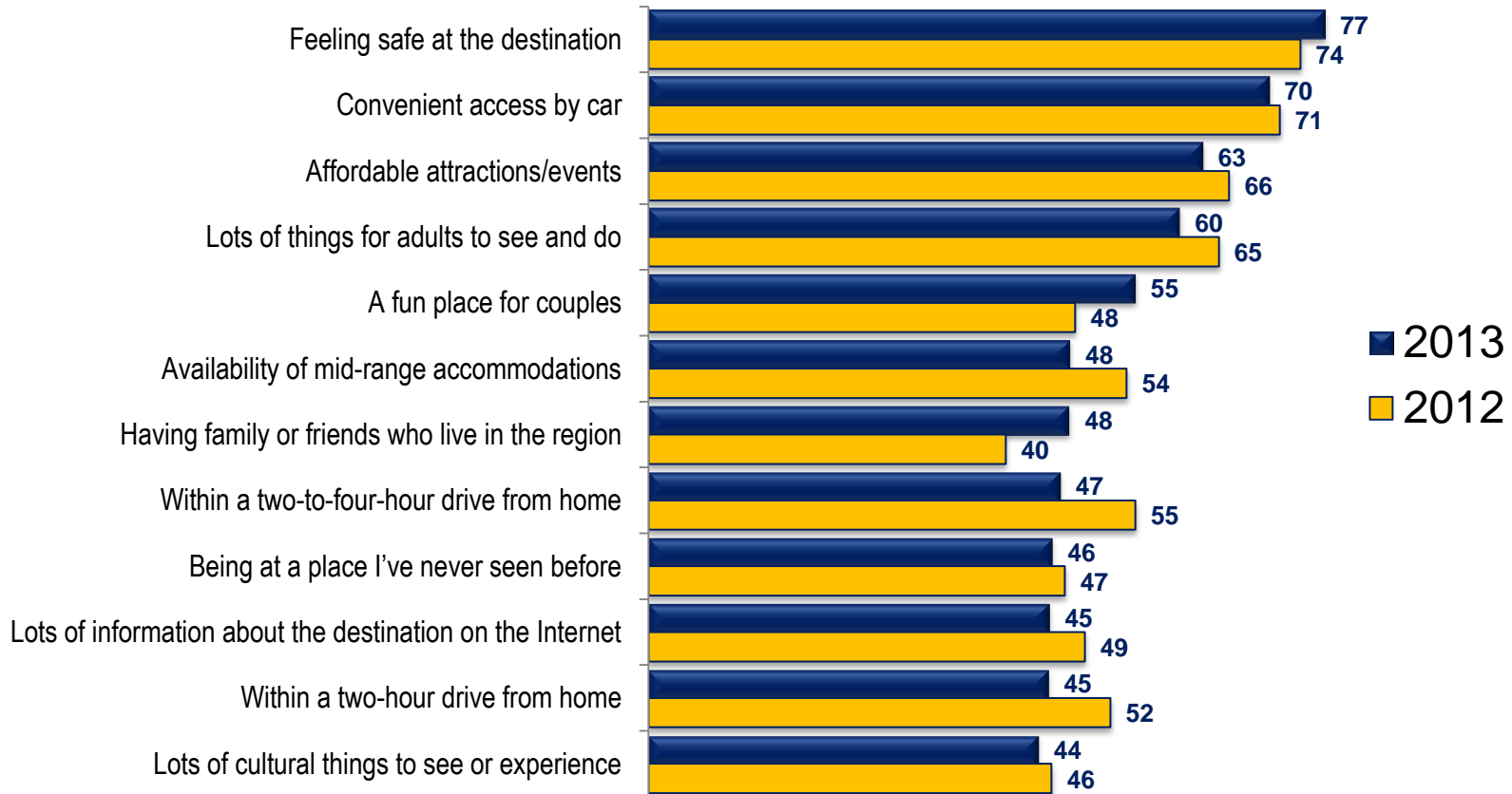
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pocono Mountains



Base: Overnight Trips

% Rating Factor As Very Important*



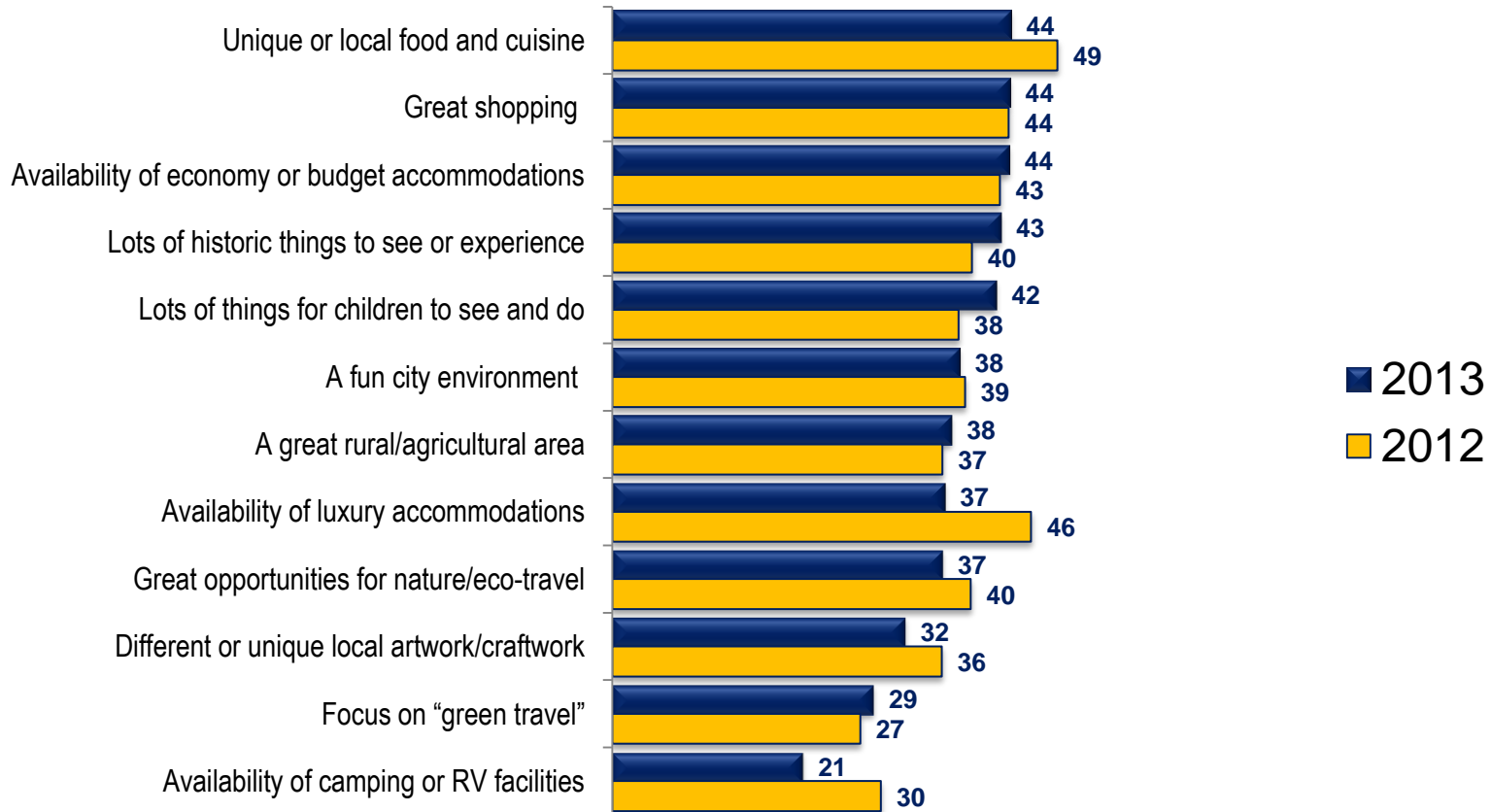
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



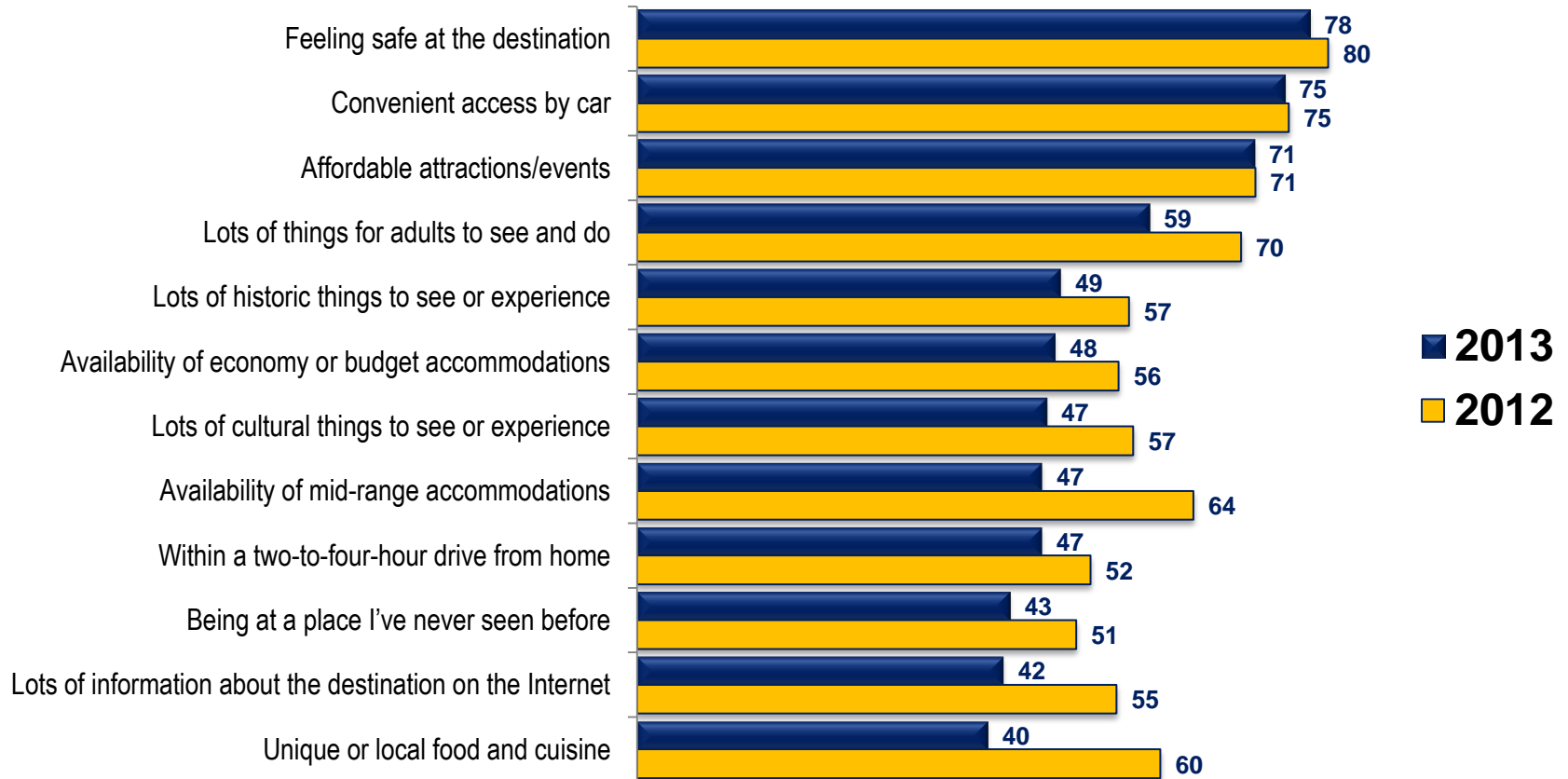
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Dutch Country Roads



Base: Marketable Overnight Trips

% Rating Factor As Very Important*



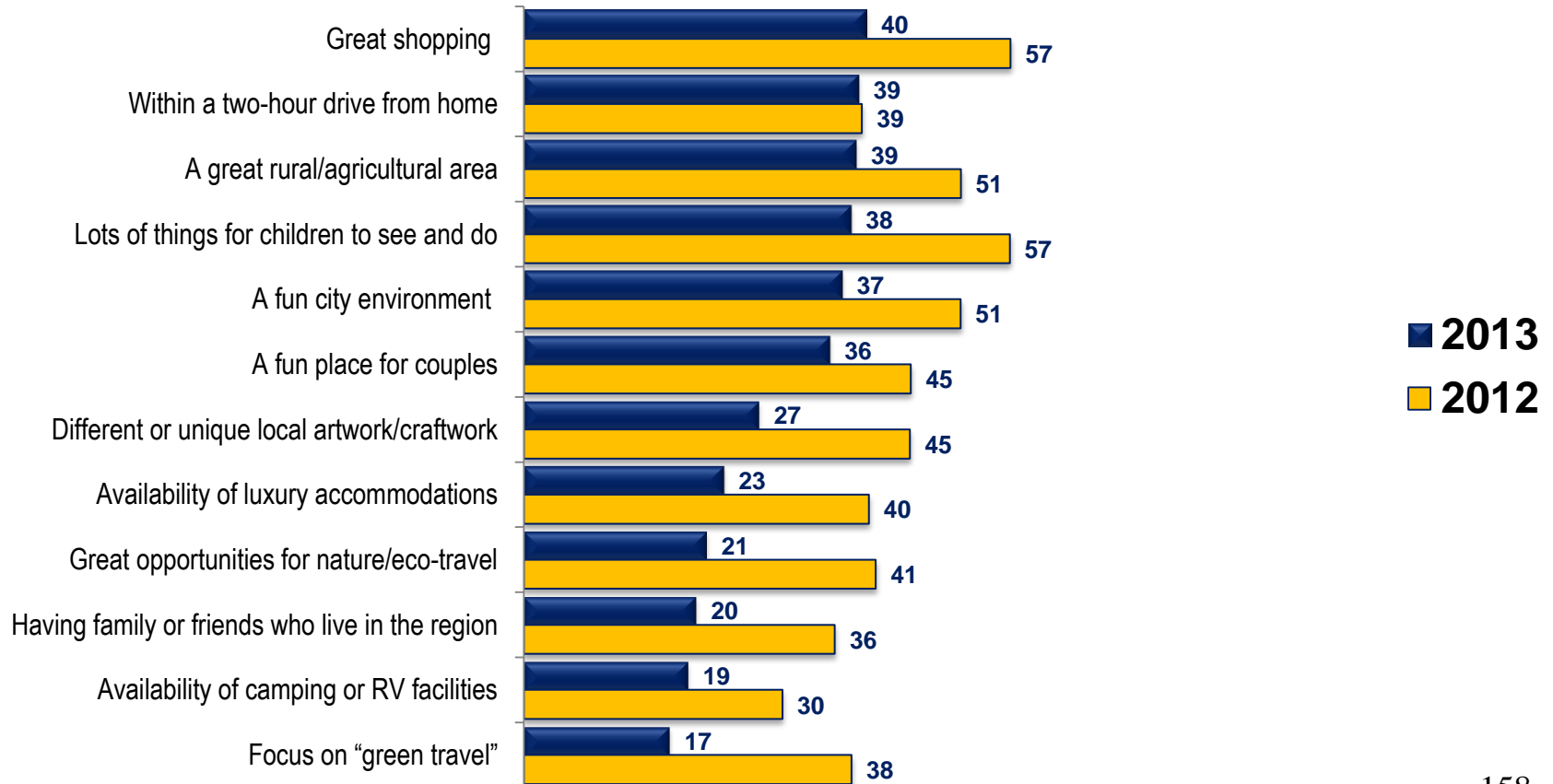
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Marketable Overnight Trips

% Rating Factor As Very Important*



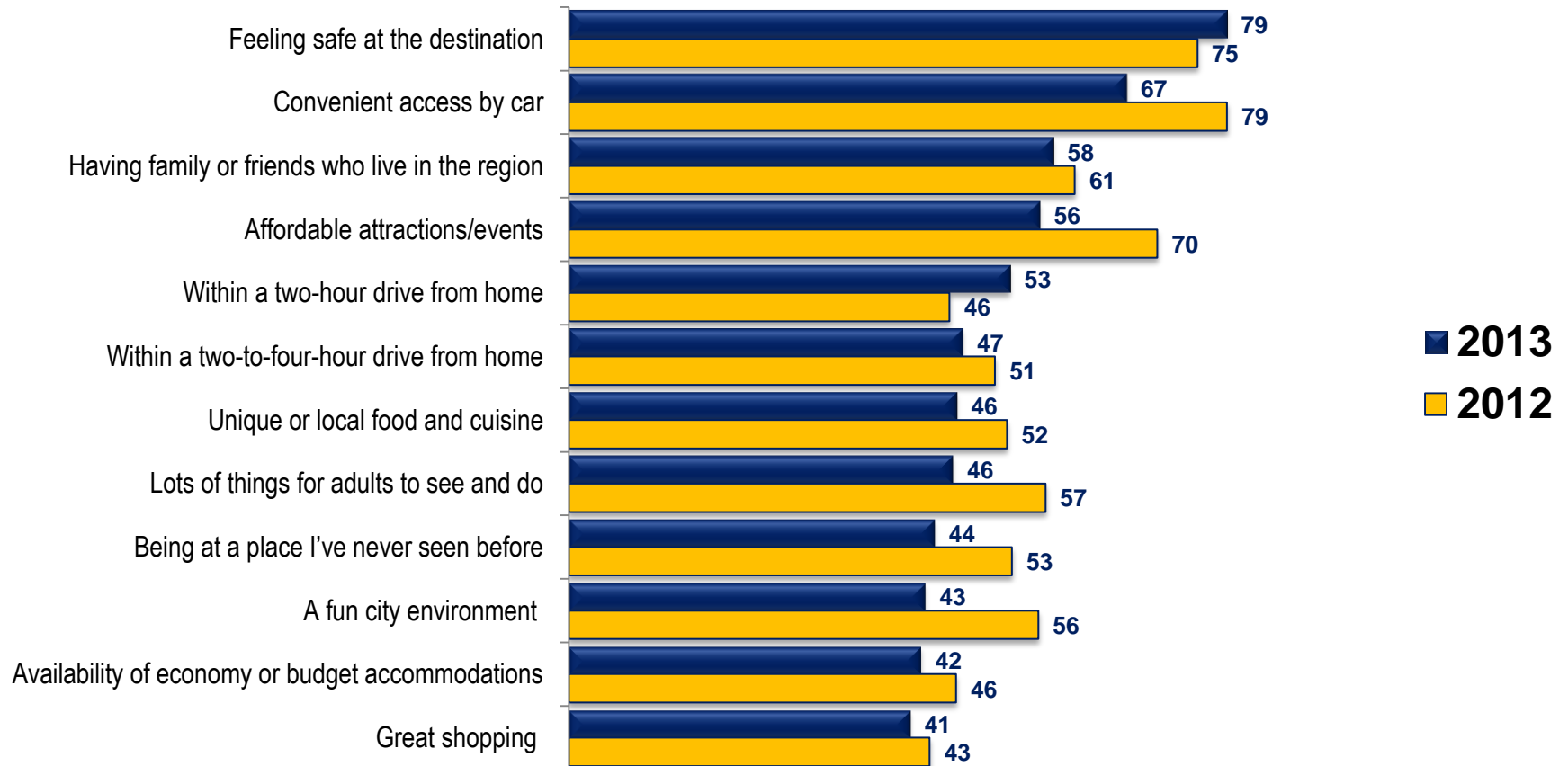
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Lehigh Valley



Base: Overnight Trips

% Rating Factor As Very Important*



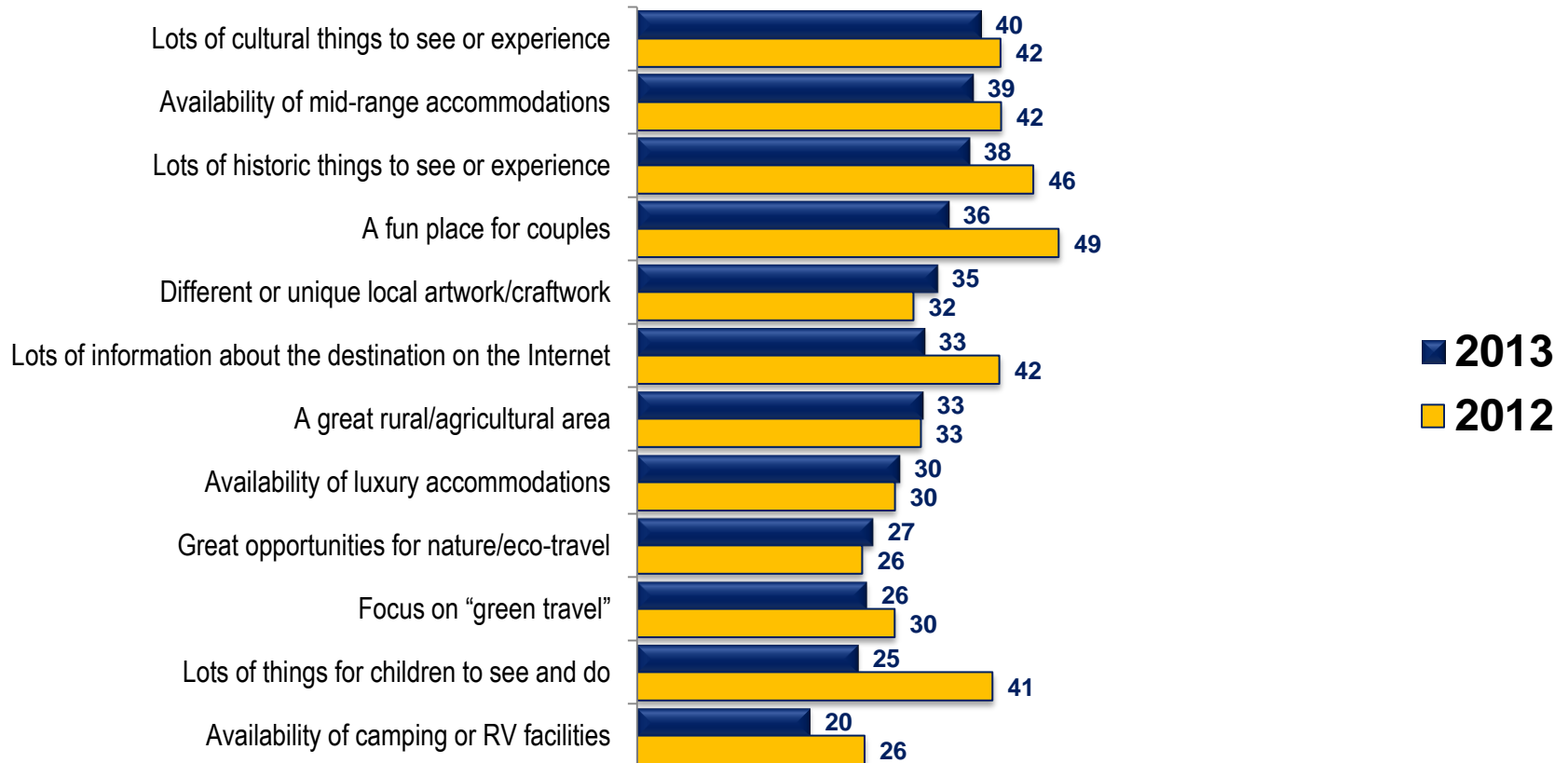
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



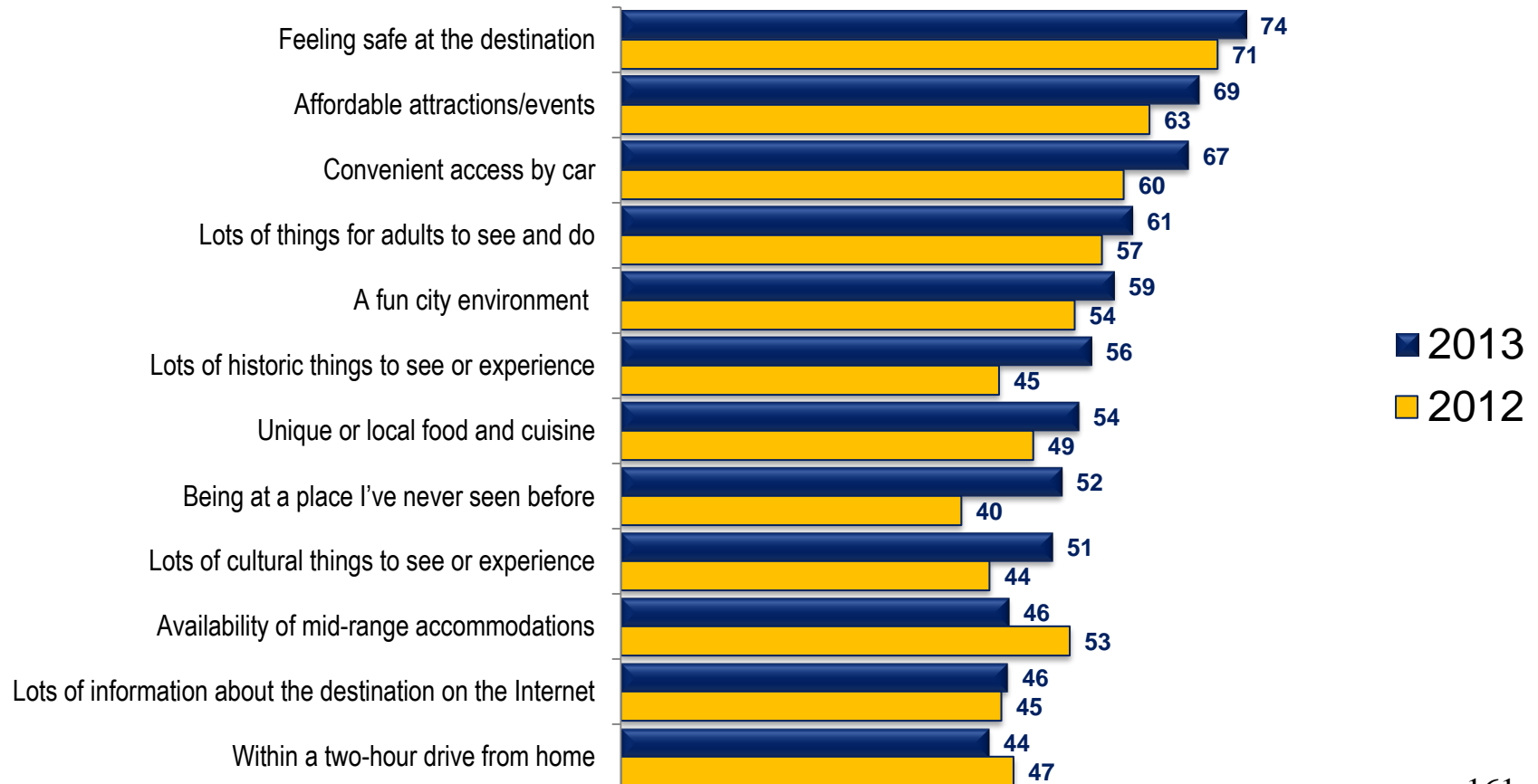
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Philadelphia & The Countryside



Base: Marketable Overnight Trips

% Rating Factor As Very Important*



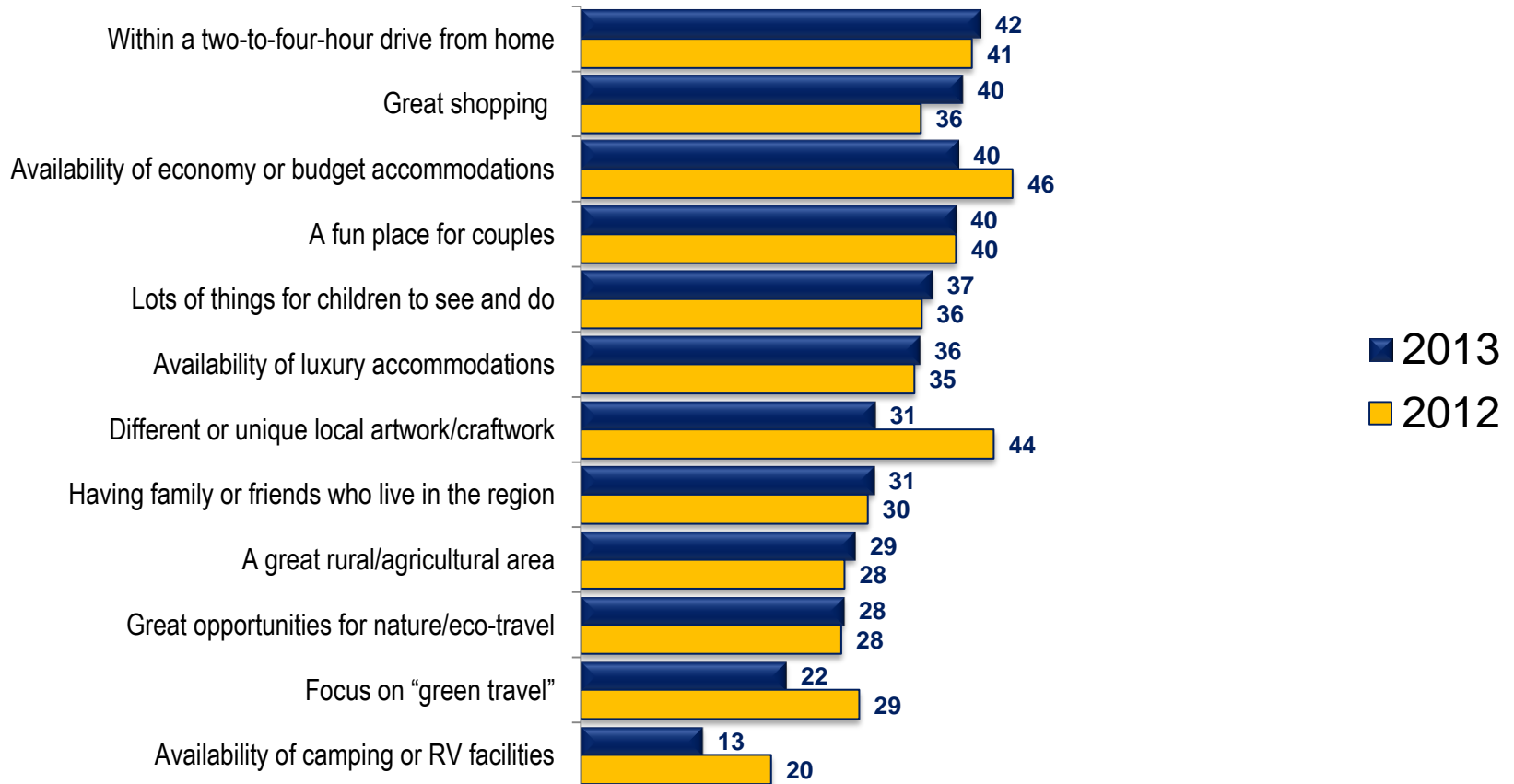
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Marketable Overnight Trips

% Rating Factor As Very Important*



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

**Product Delivery —
Marketable Overnight Trips**

Traveler Priorities

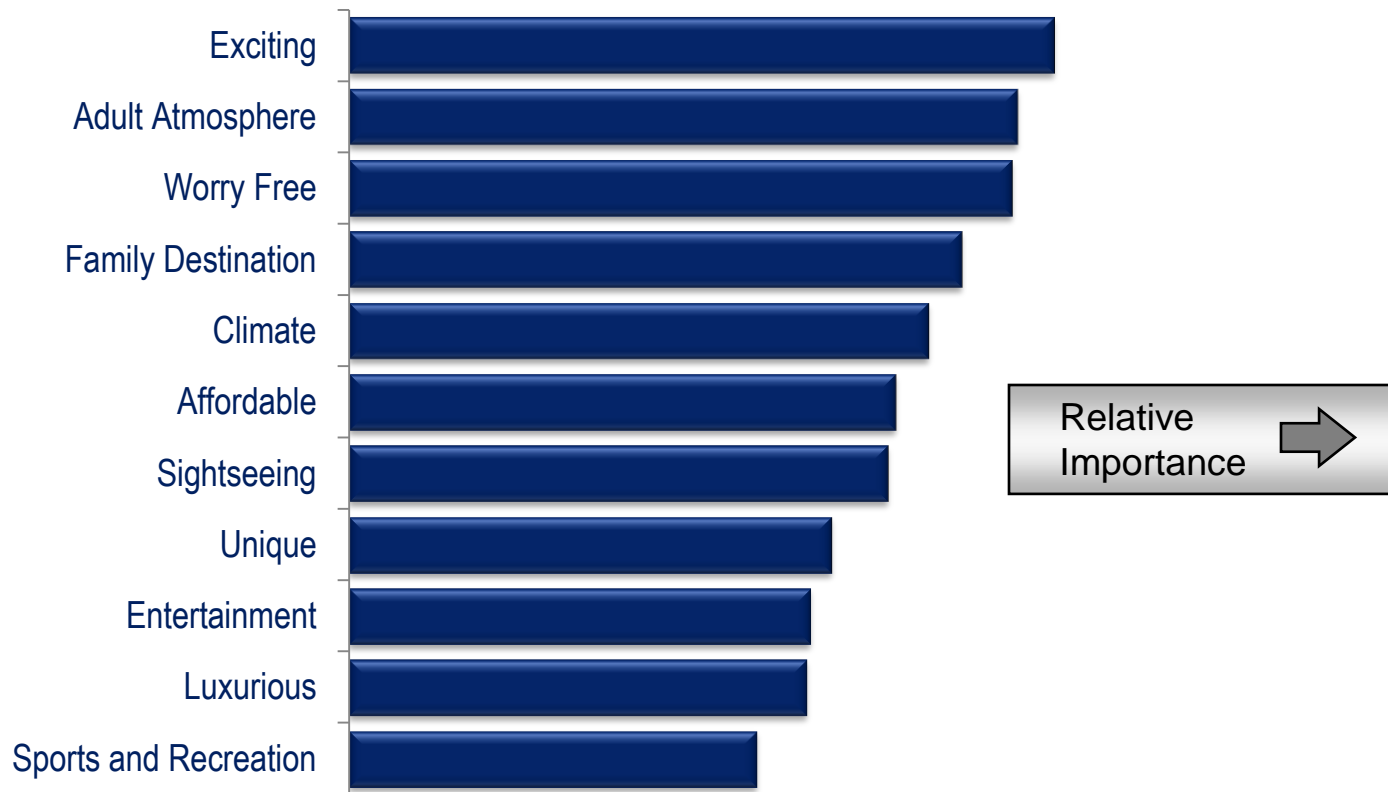


- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- The degree of association between each factor was then measured on whether Pennsylvania is a place “I would really enjoy visiting.”
- To motivate Pennsylvania visitors to return, it is important that the state be perceived as a destination that is exciting, attractive for adult vacation, while at the same time safe and worry-free and family-friendly.

Traveler Priorities



Base: Overnight Trips



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

Hot Buttons



Base: Overnight Trips

1 A fun place for a vacation/getaway

2 A place I would feel welcome

3 Good place to get away and relax

4 Lots to see and do

5 Good for adult vacation/getaway

6 Truly beautiful scenery

7 A good place for couples to visit

8 Affordable accommodations

9 Exciting destination

10 Great value for the money

11 Safe place to travel in tourist areas

12 Good place for families to visit

13 Very affordable vacation destination

14 Must-see destination

15 Great place for walking/strolling about

16 A place welcoming for children

Product Delivery



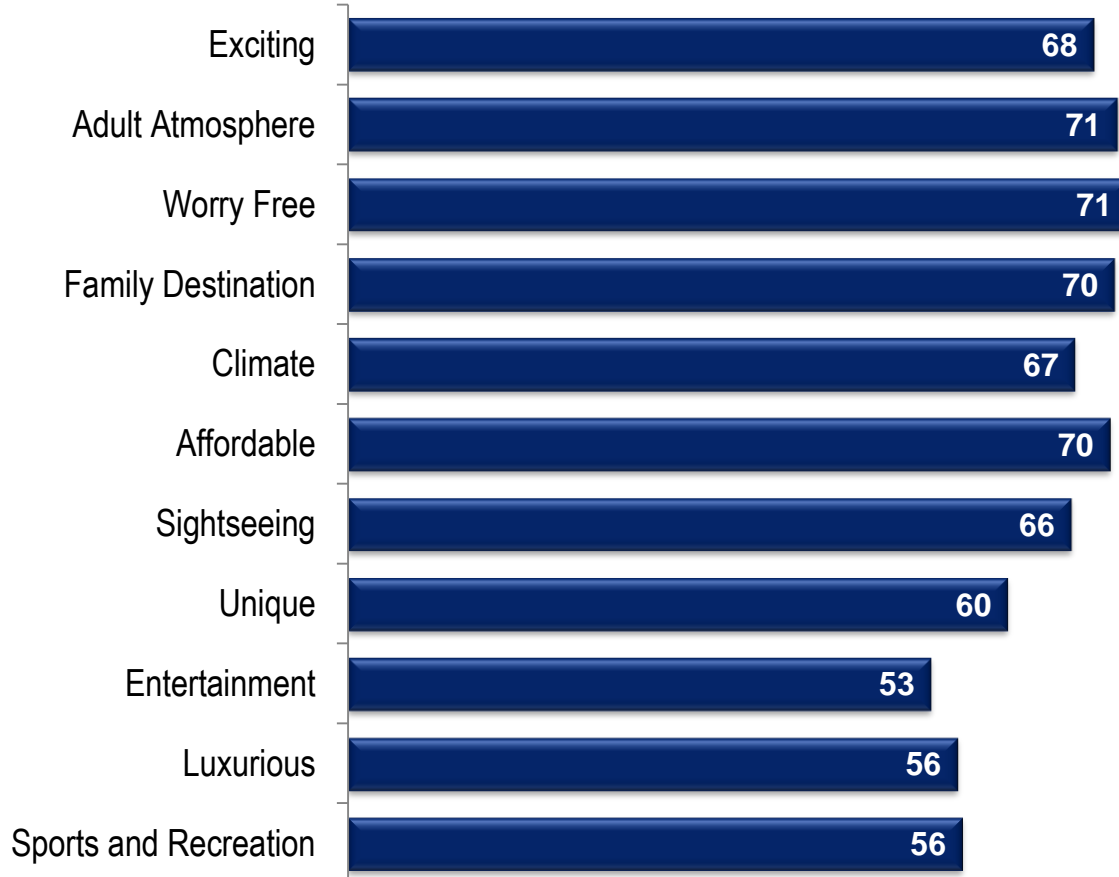
- ◉ Image ratings by recent visitors can be viewed as product ratings such that the recent visitor is, presumably, rating Pennsylvania from his/her experience.
- ◉ Pennsylvania's image strengths among recent visitors include proximity, beautiful scenery, well-known landmarks, a good place for adults and for families to visit and it's history. Pennsylvania is also seen as a fun, relaxing, welcoming place with lots to see and do.

Pennsylvania's Product Delivery



Base: Marketable Overnight Trips

Percent Who Strongly Agree

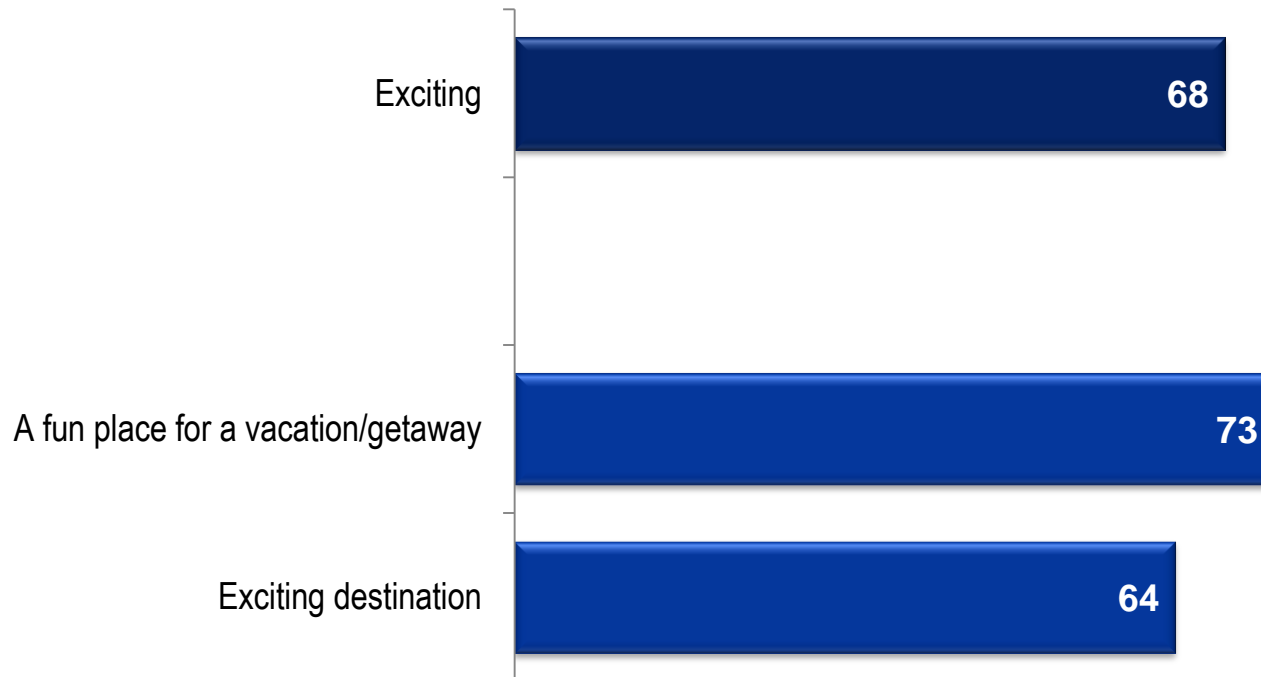


Pennsylvania's Product Delivery — Exciting



Base: Marketable Overnight Trips

Percent Who Strongly Agree

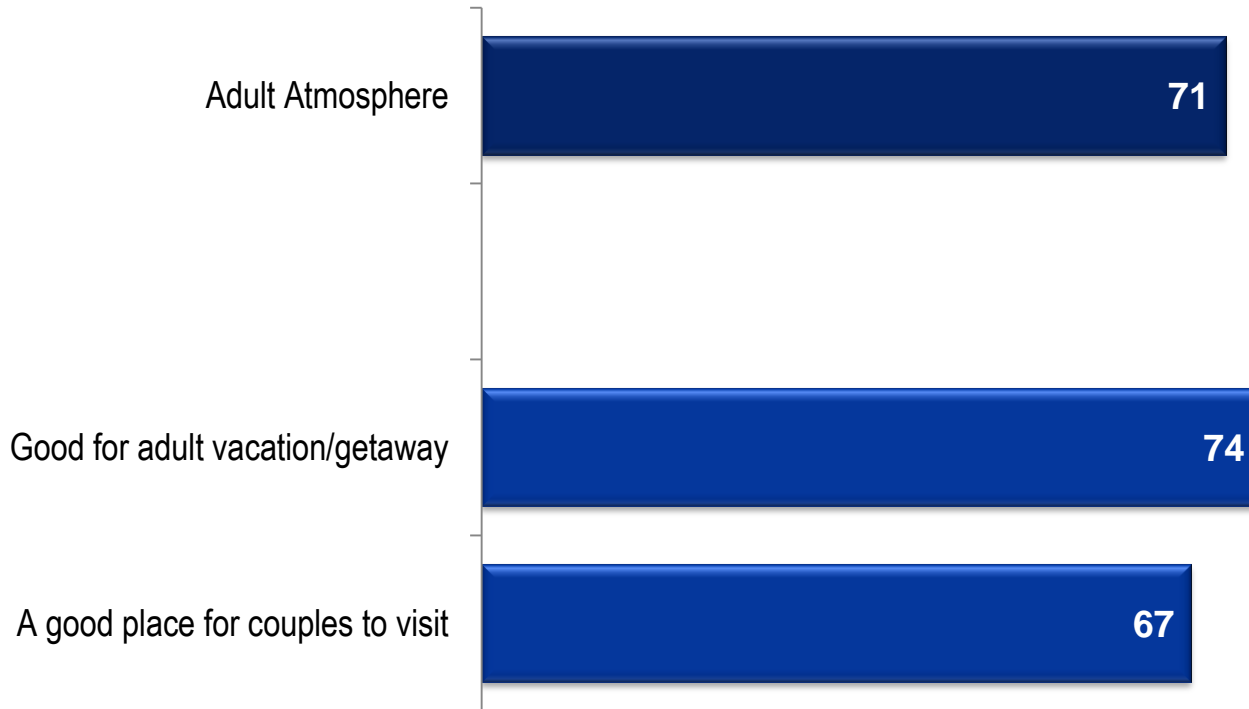


Pennsylvania's Product Delivery — Adult Atmosphere



Base: Marketable Overnight Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Worry Free



Base: Marketable Overnight Trips

Percent Who Strongly Agree

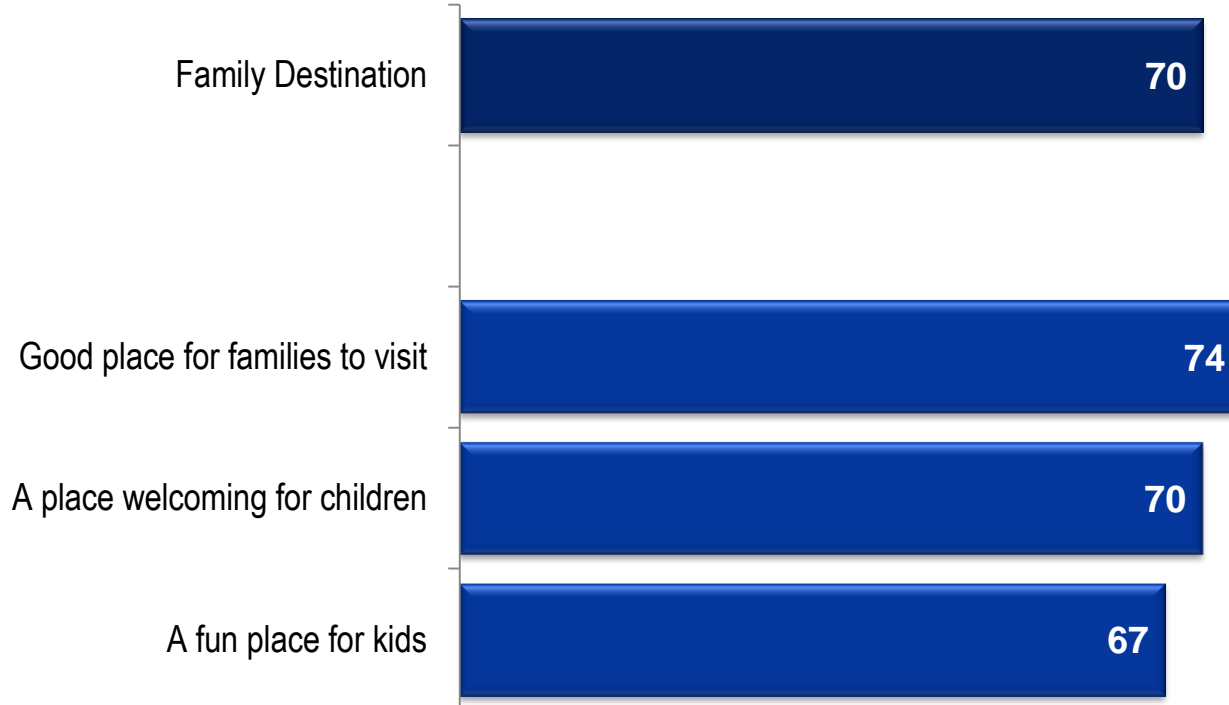


Pennsylvania's Product Delivery — Family Destination



Base: Marketable Overnight Trips

Percent Who Strongly Agree

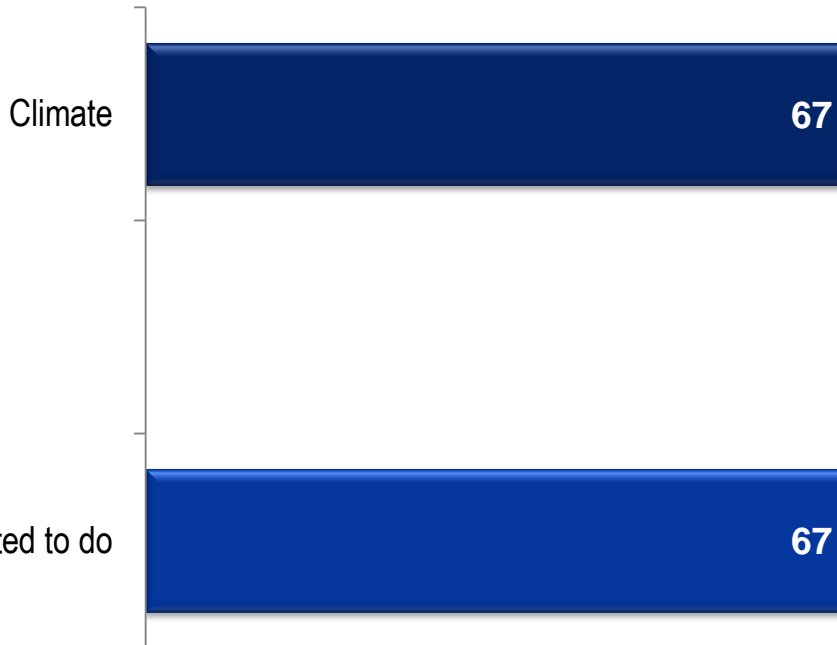


Pennsylvania's Product Delivery — Climate



Base: Marketable Overnight Trips

Percent Who Strongly Agree



Climate was perfect for what we wanted to do

Pennsylvania's Product Delivery — Affordable



Base: Marketable Overnight Trips

Percent Who Strongly Agree

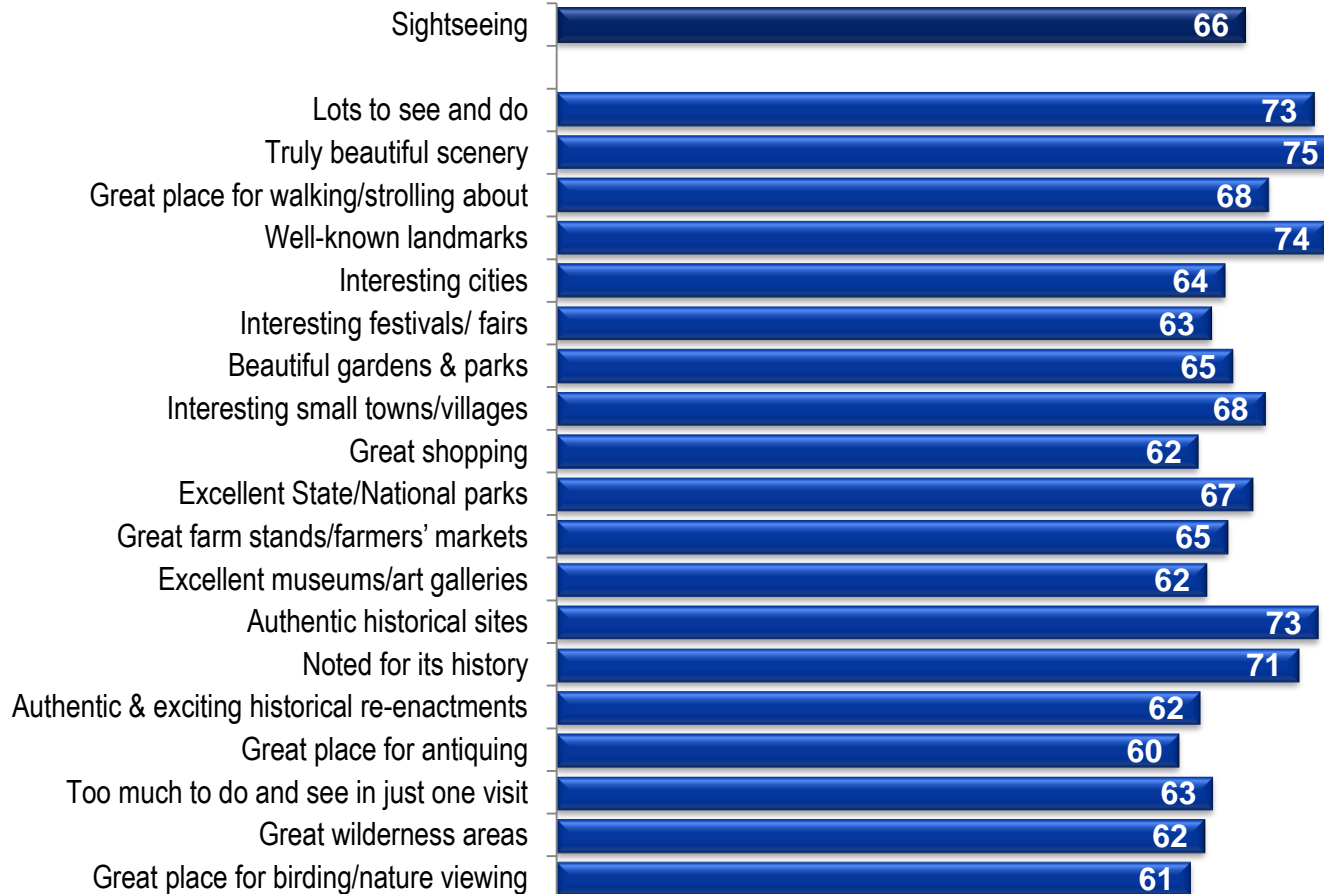


Pennsylvania's Product Delivery — Sightseeing



Base: Marketable Overnight Trips

Percent Who Strongly Agree

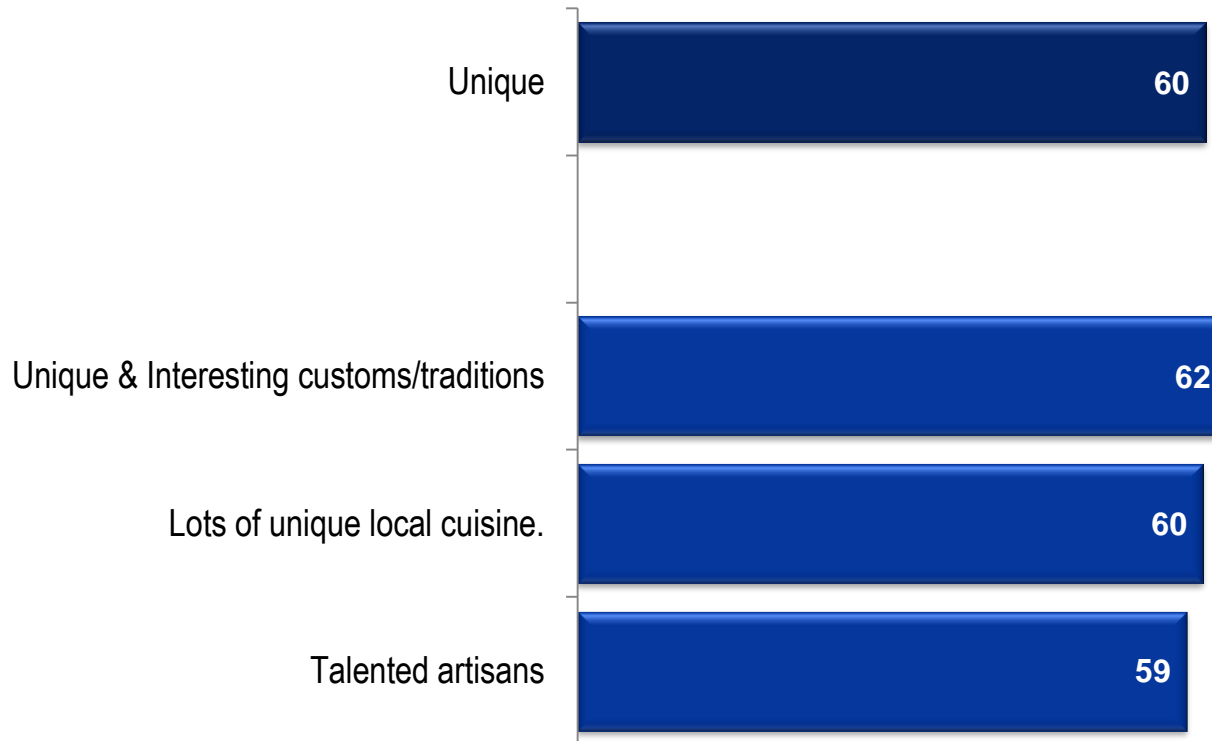


Pennsylvania's Product Delivery — Unique



Base: Marketable Overnight Trips

Percent Who Strongly Agree

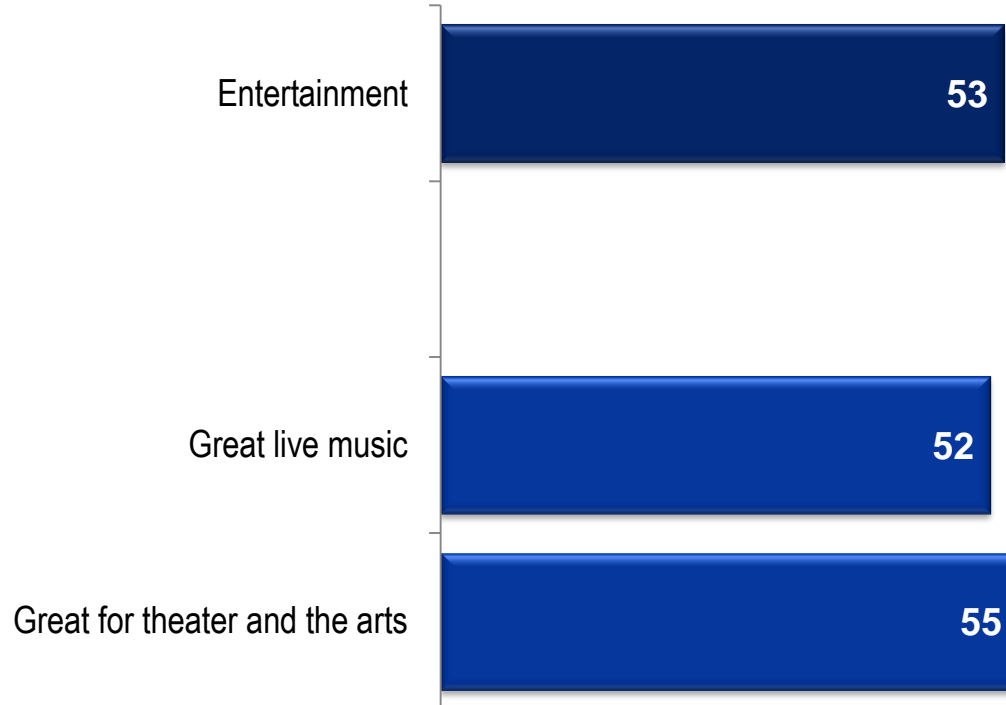


Pennsylvania's Product Delivery — Entertainment



Base: Marketable Overnight Trips

Percent Who Strongly Agree

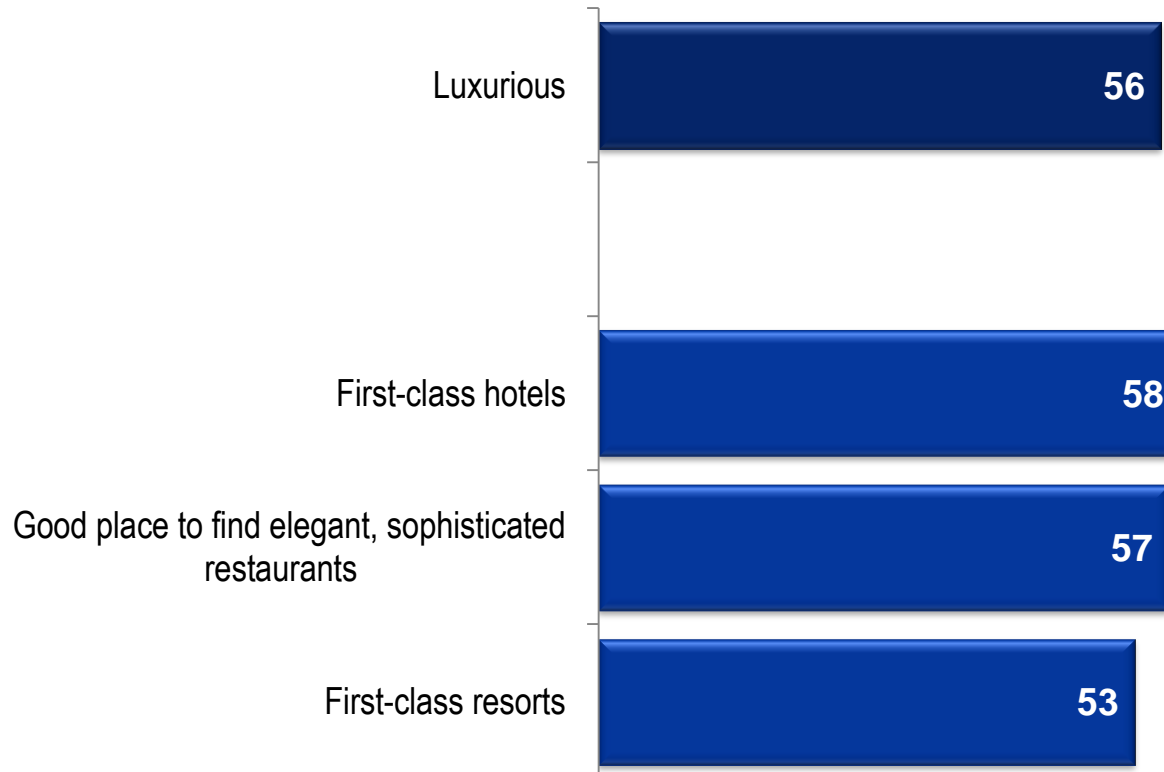


Pennsylvania's Product Delivery — Luxurious



Base: Marketable Overnight Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Sports & Recreation



Base: Marketable Overnight Trips

Percent Who Strongly Agree



Pennsylvania's Top 20 Image Attributes



Base: Marketable Overnight Trips

Percent Who Strongly Agree



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



Base: Marketable Overnight Trips

Percent Who Strongly Agree

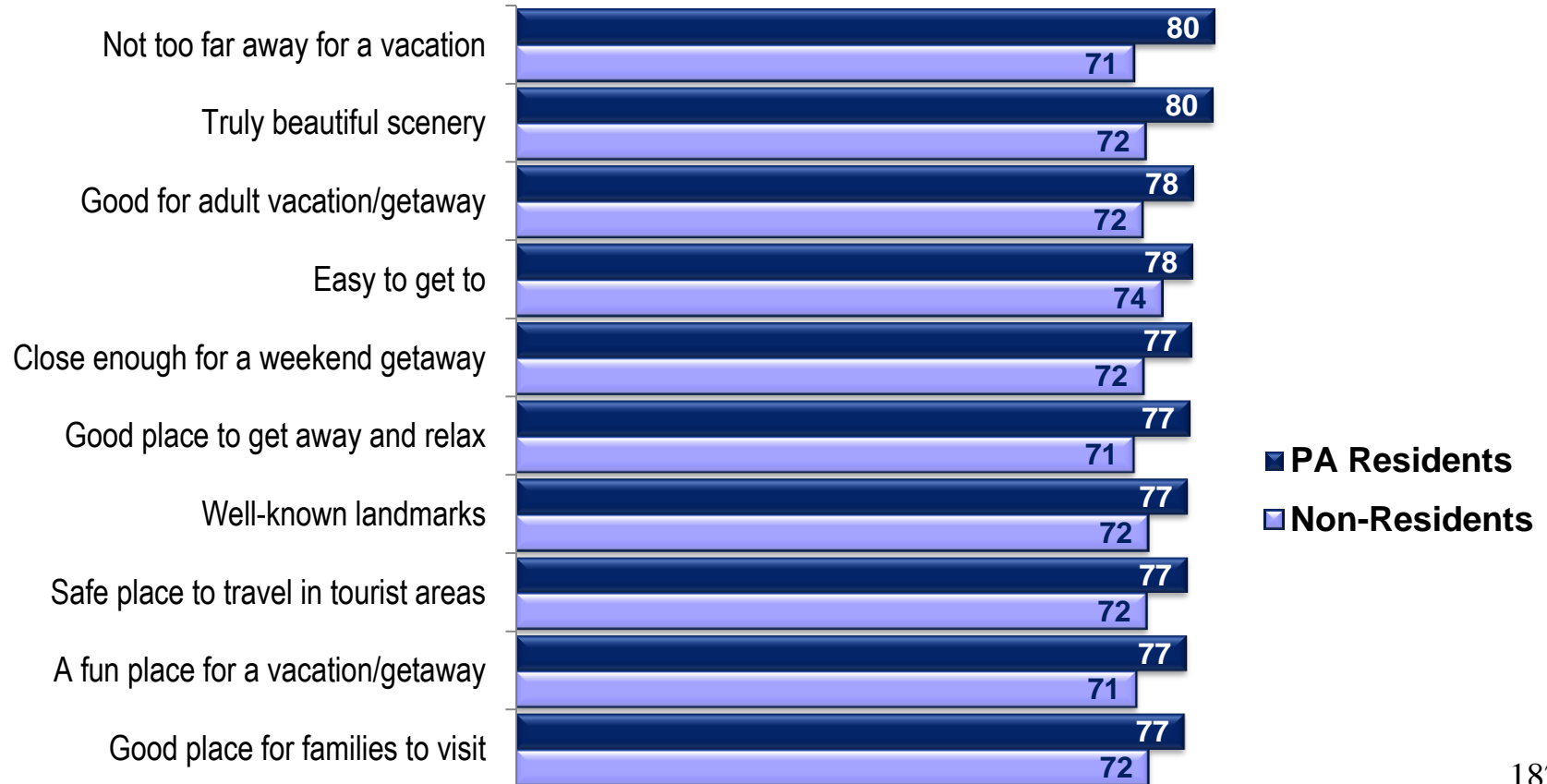


Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents



Base: Marketable Overnight Trips

Percent who strongly agree

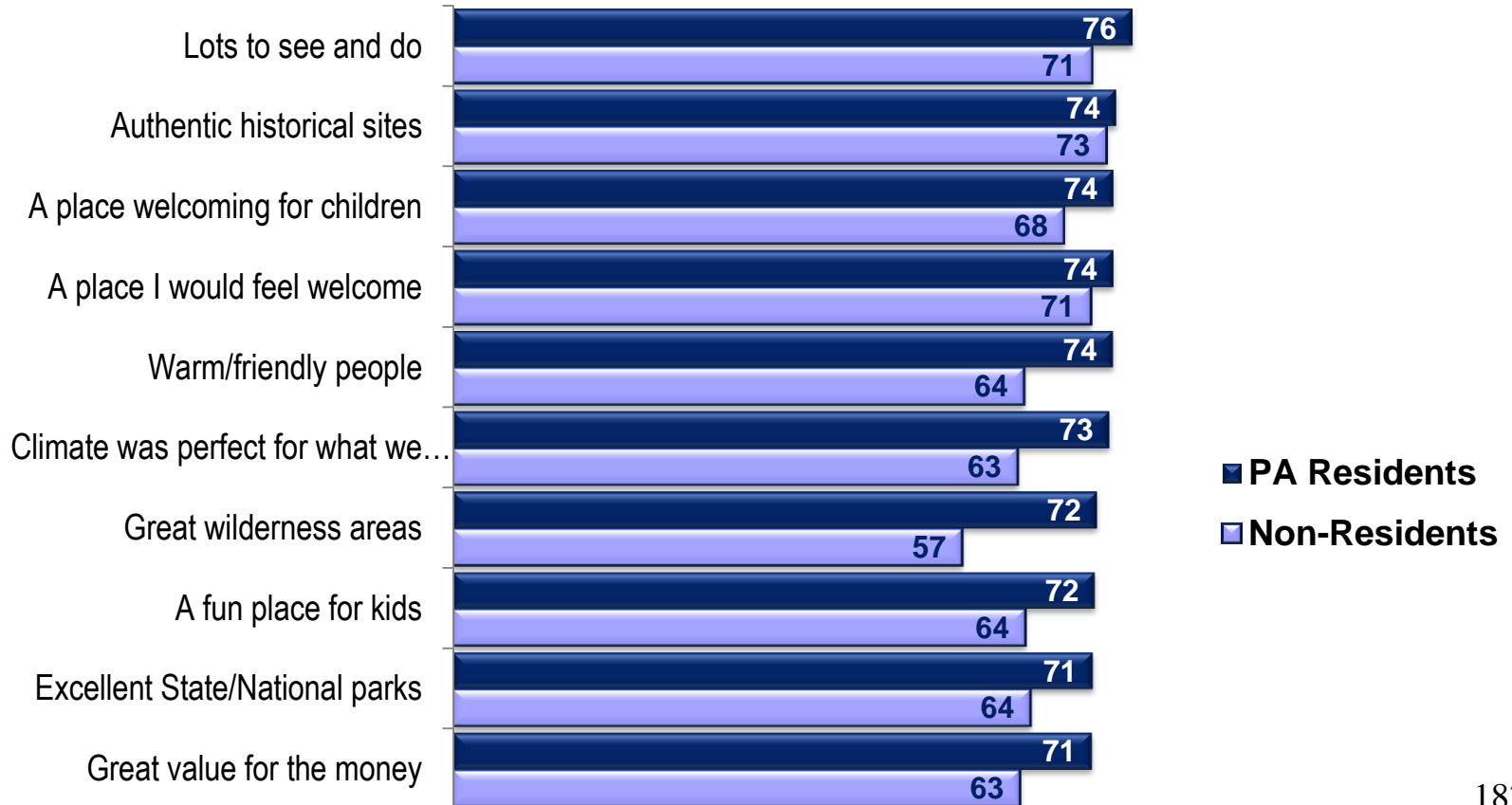


Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents (Cont'd)



Base: Marketable Overnight Trips

Percent who strongly agree

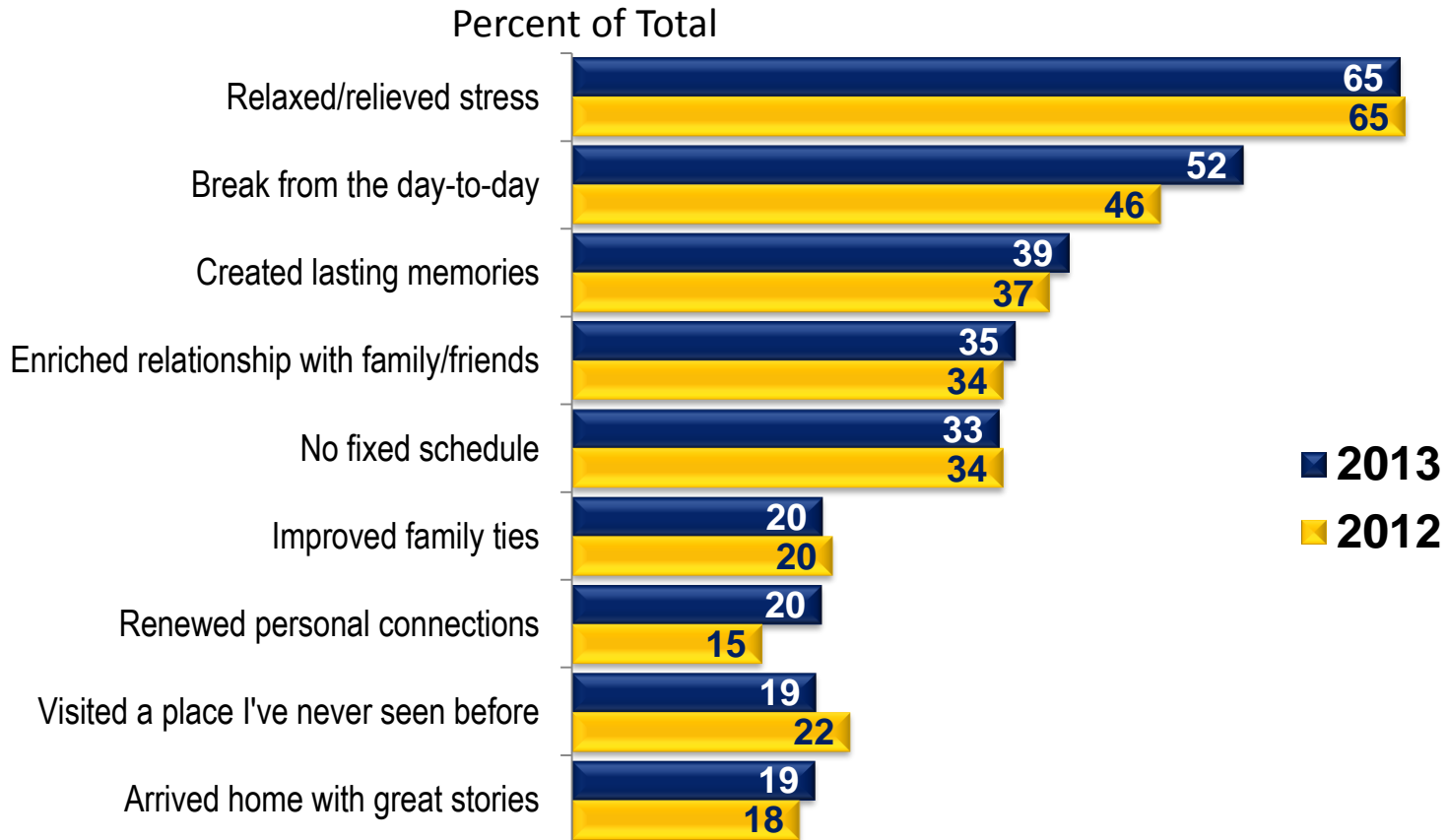


Trip Benefits — Marketable Overnight Trips

Benefits From Pennsylvania Overnight Trip



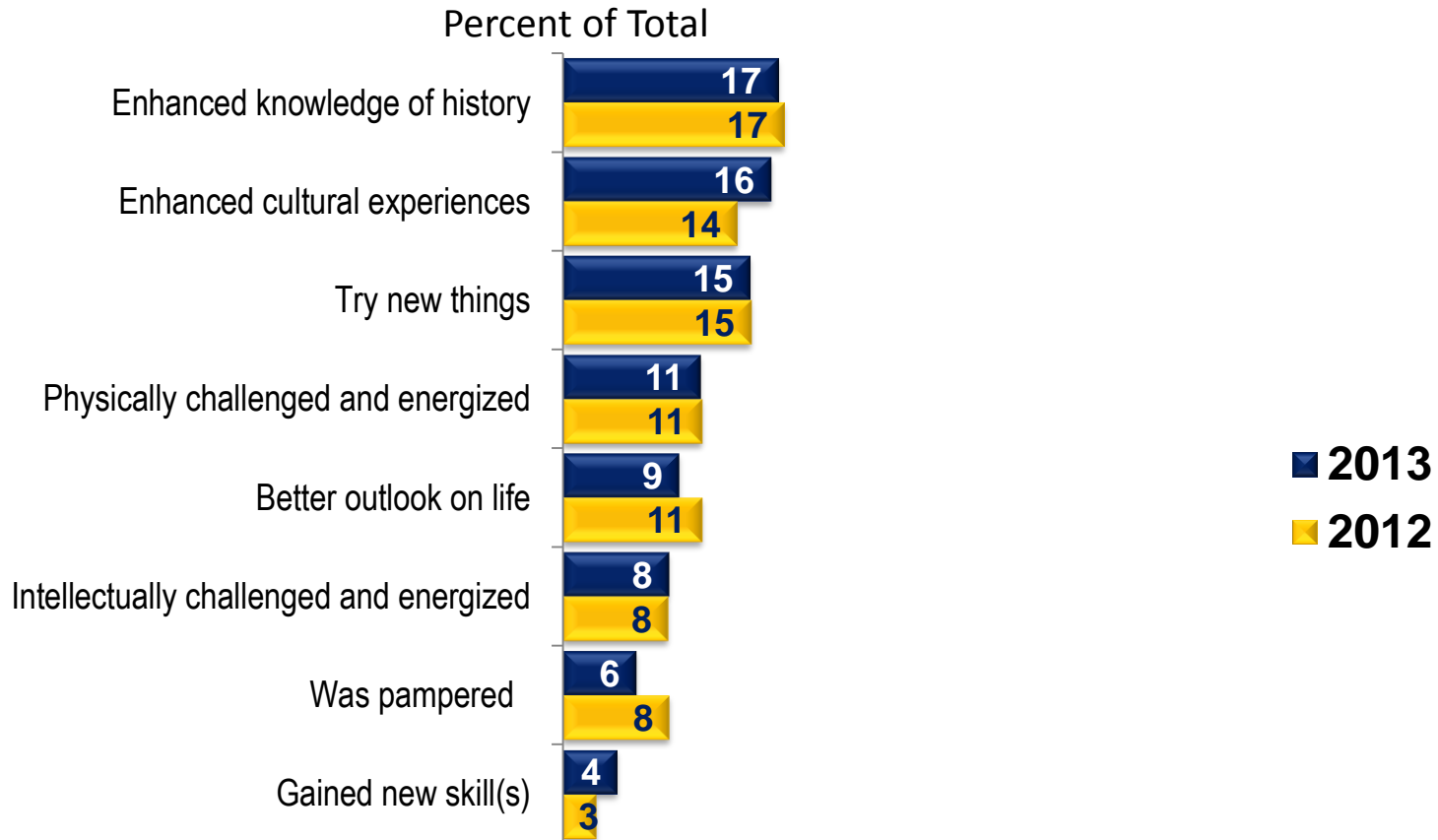
Base: Marketable Overnight Trips



Benefits From Pennsylvania Overnight Trip



Base: Marketable Overnight Trips



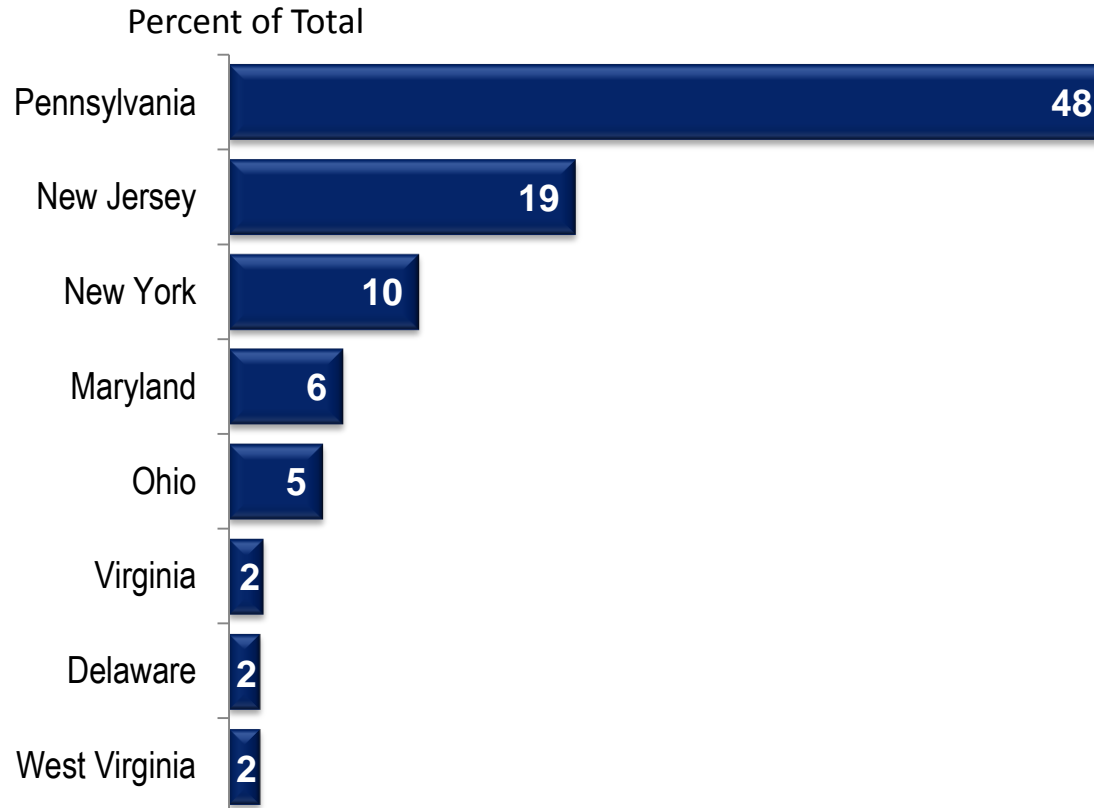
Pennsylvania Day-Trips

Origin Markets — Pennsylvania Day-Trips

State Origin Markets – Marketable Day-Trips



Base: Marketable Day-Trips

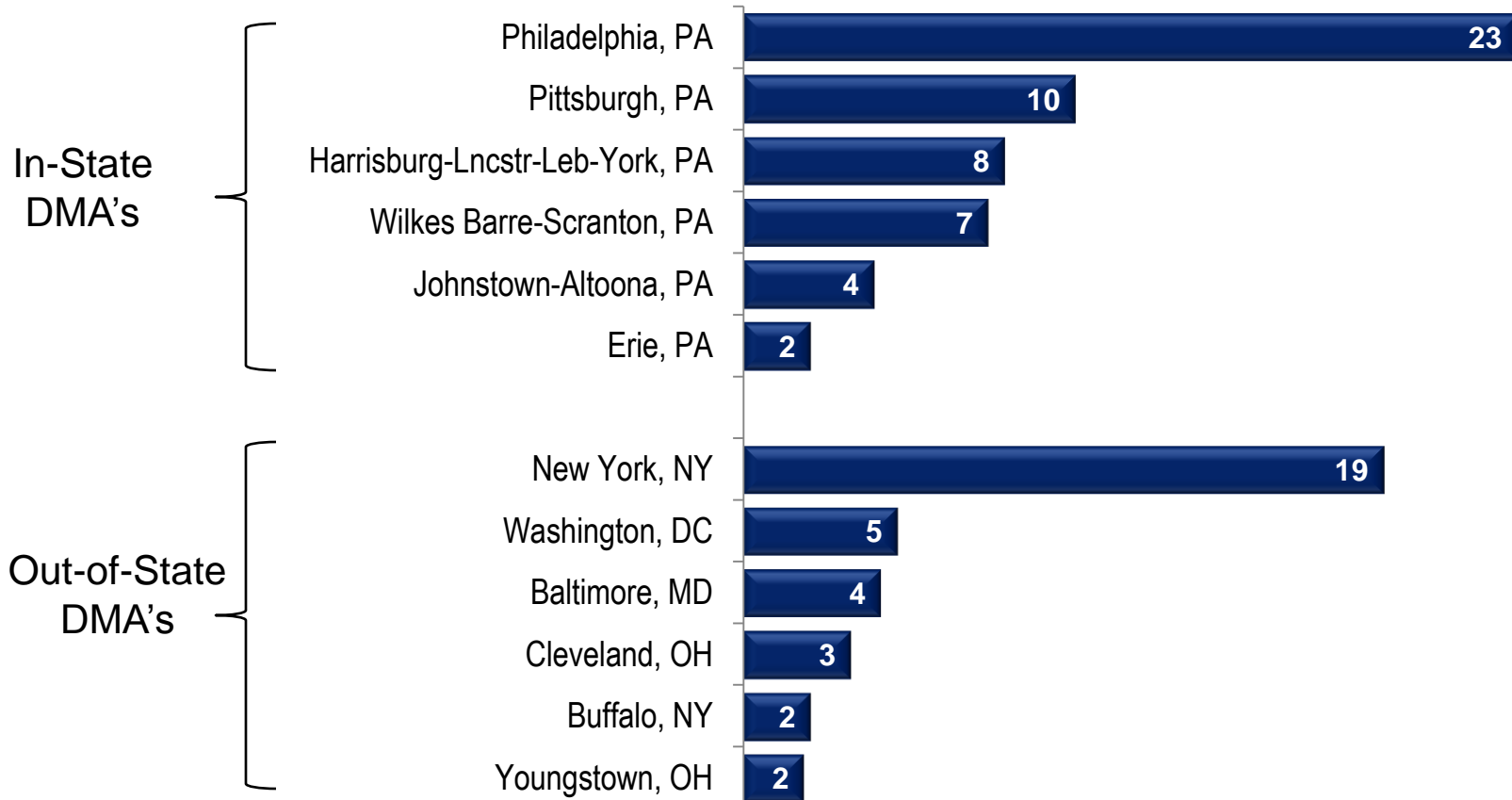


Urban Origin Markets – Marketable Day-Trips



Base: Marketable Day-Trips

Percent of Total

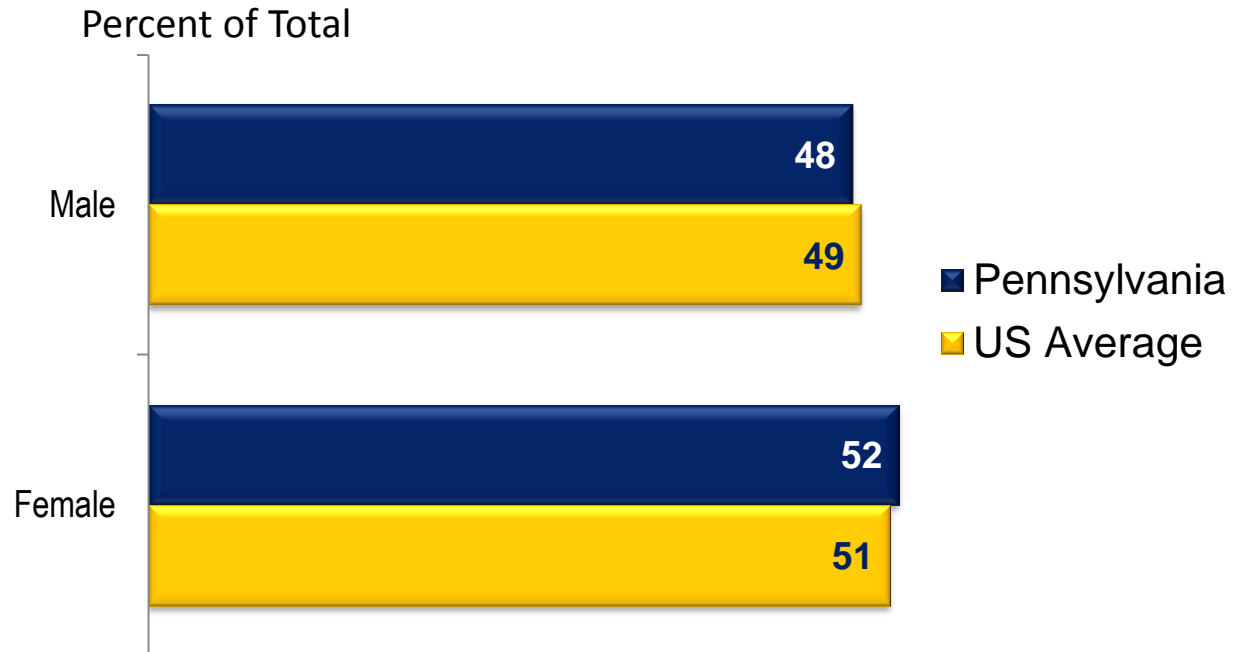


Traveler Profile — Marketable Day-Trips

Gender



Base: Marketable Day-Trips

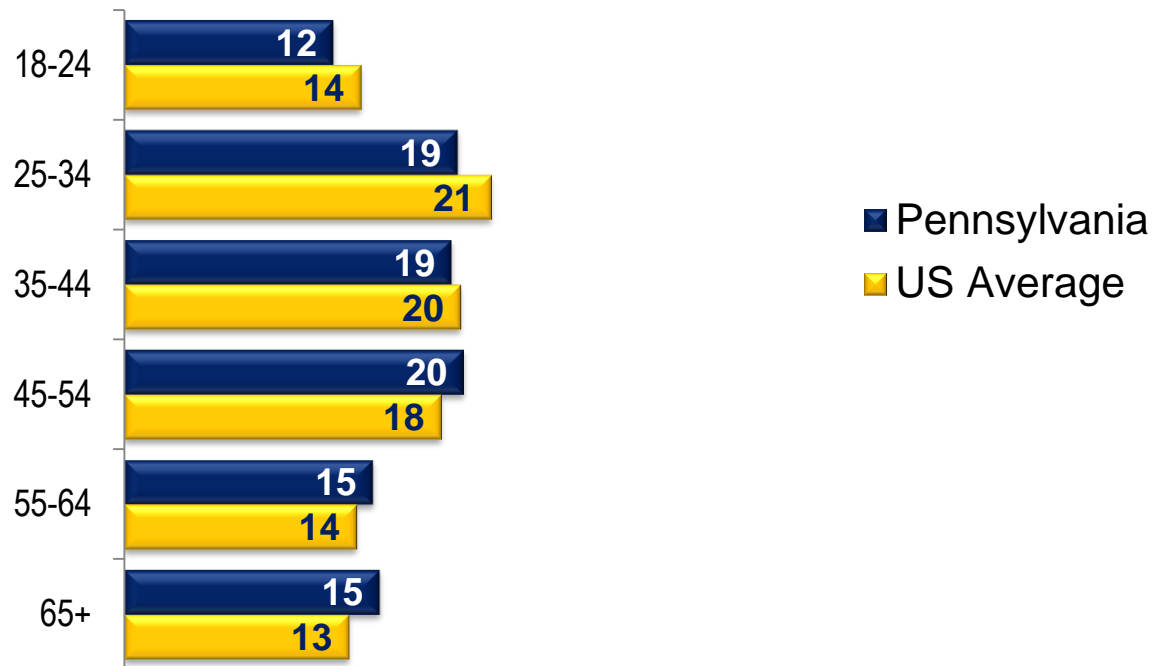


Age



Base: Marketable Day-Trips

Percent of Total



Pennsylvania

US Average

Average Age

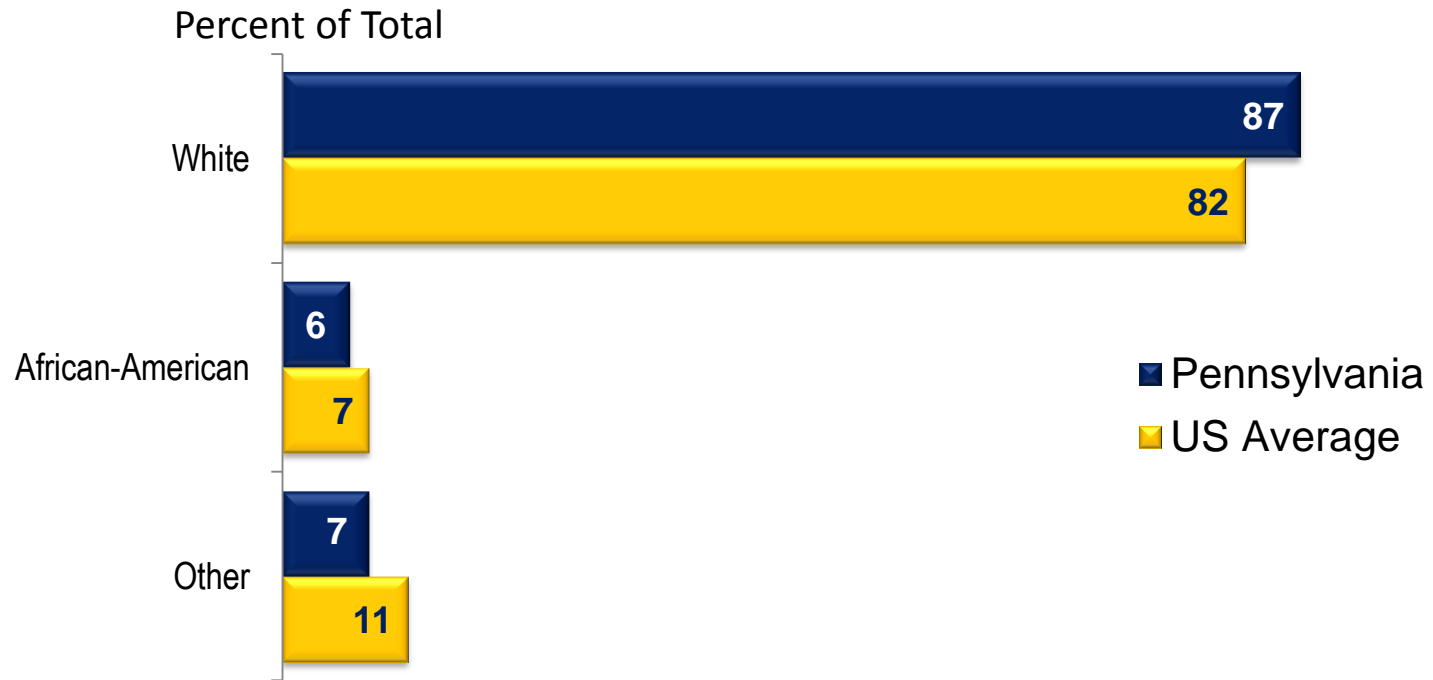
45.1

43.7

Race



Base: Marketable Day-Trips



Hispanic Background



Base: Marketable Day-Trips

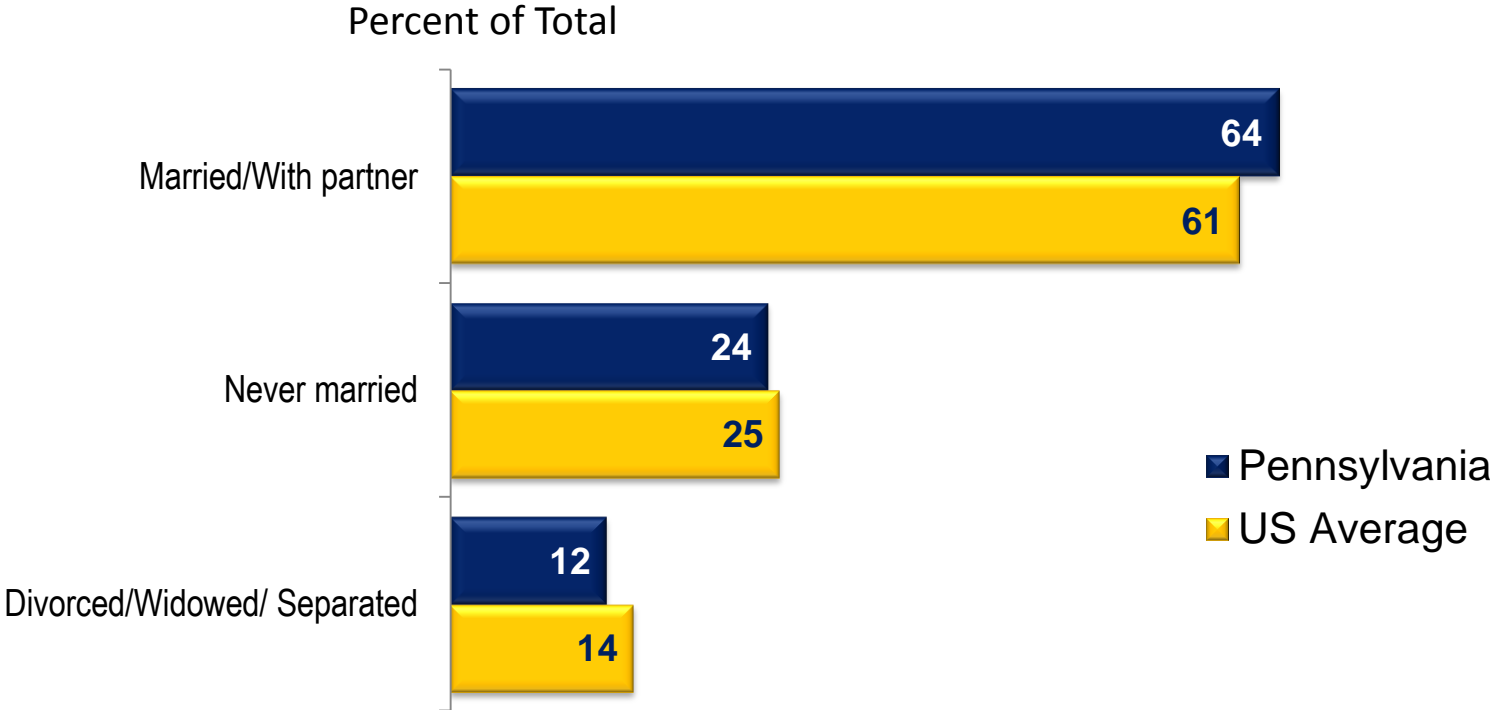
Percent of Total



Marital Status



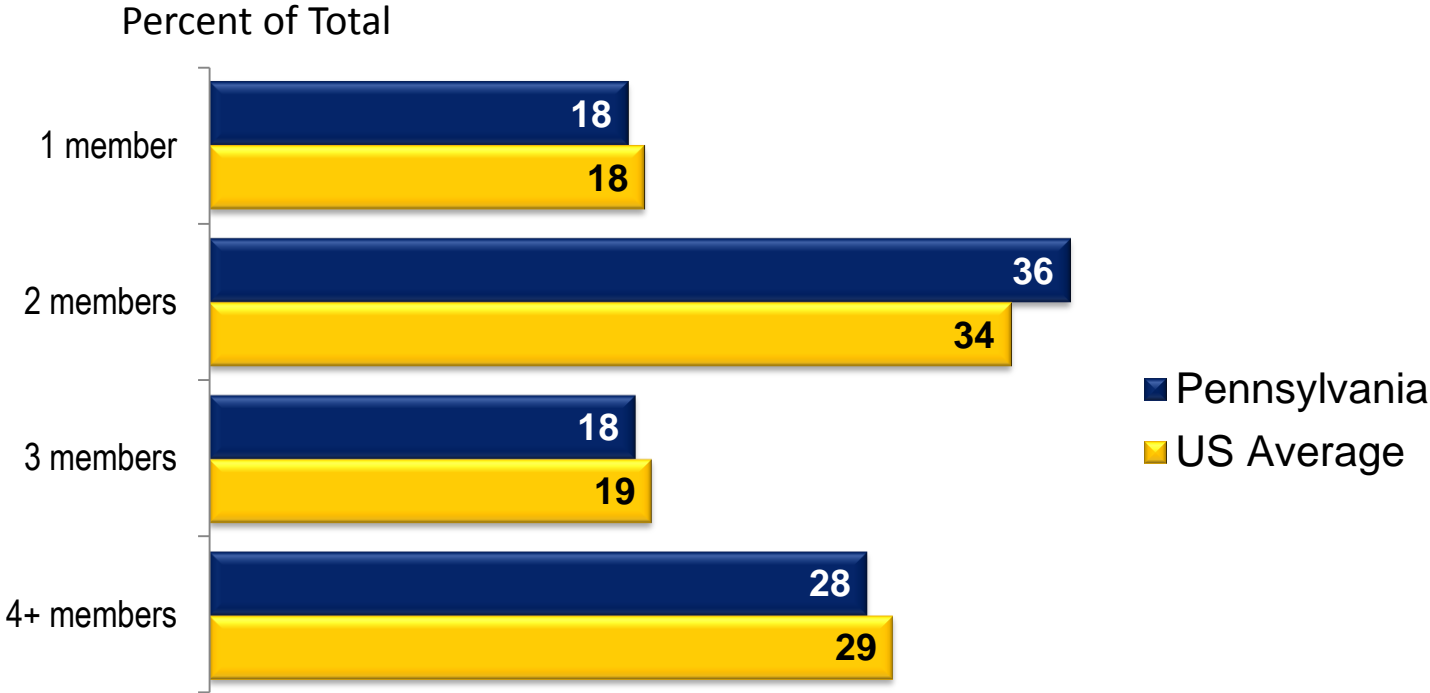
Base: Marketable Day-Trips



Household Size



Base: Marketable Day-Trips

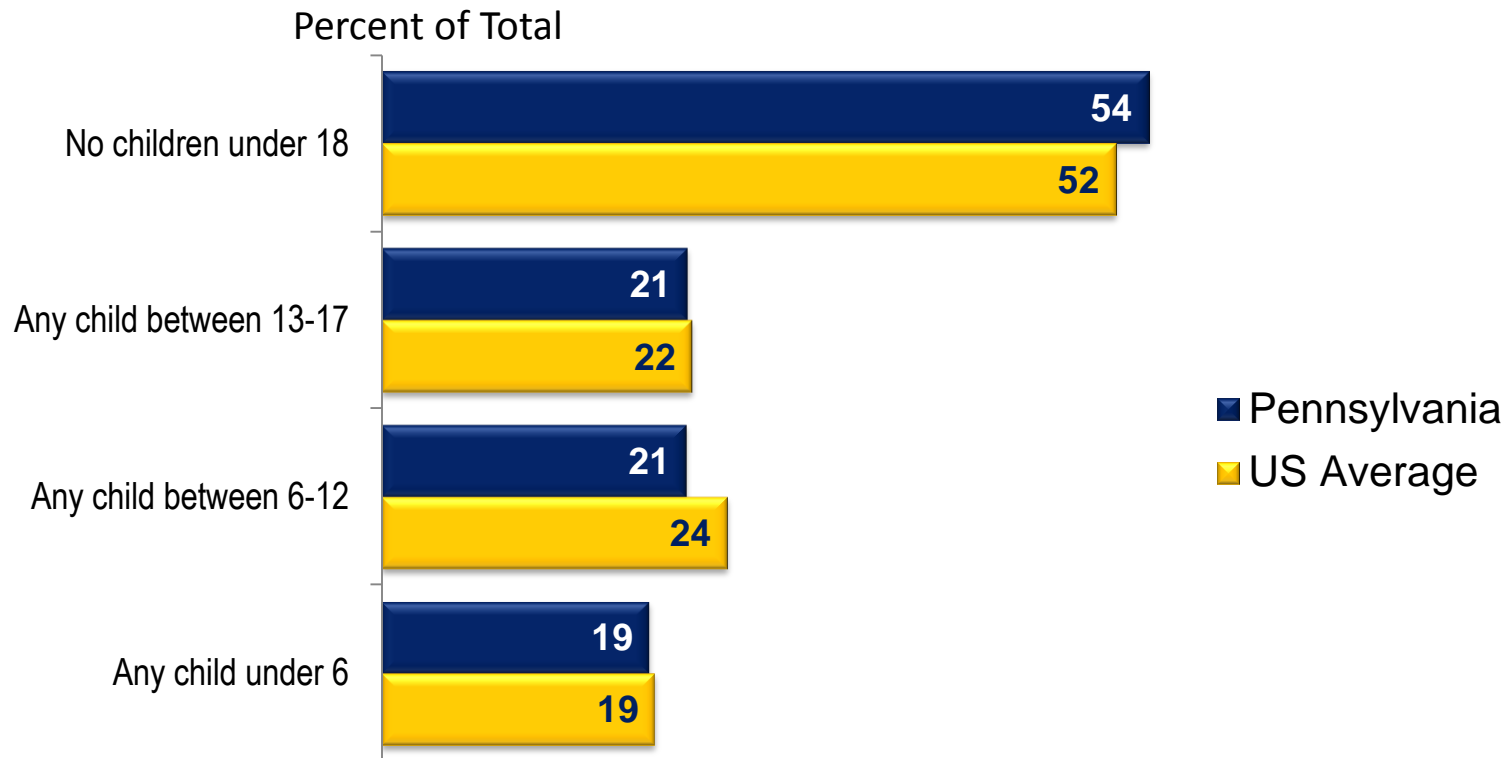


Average Household Size: Pennsylvania 2.8 United States 2.9

Children in Household



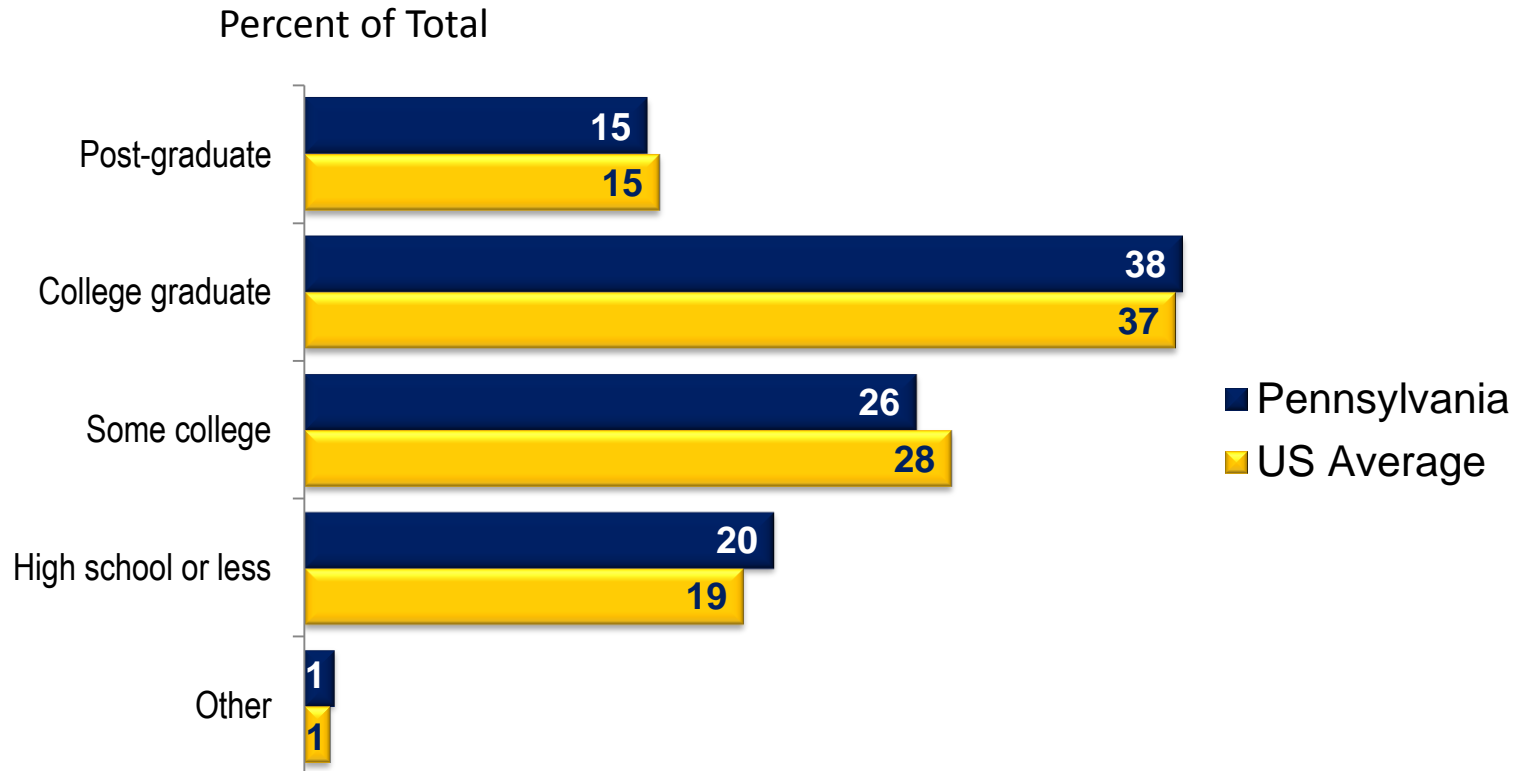
Base: Marketable Day-Trips



Education



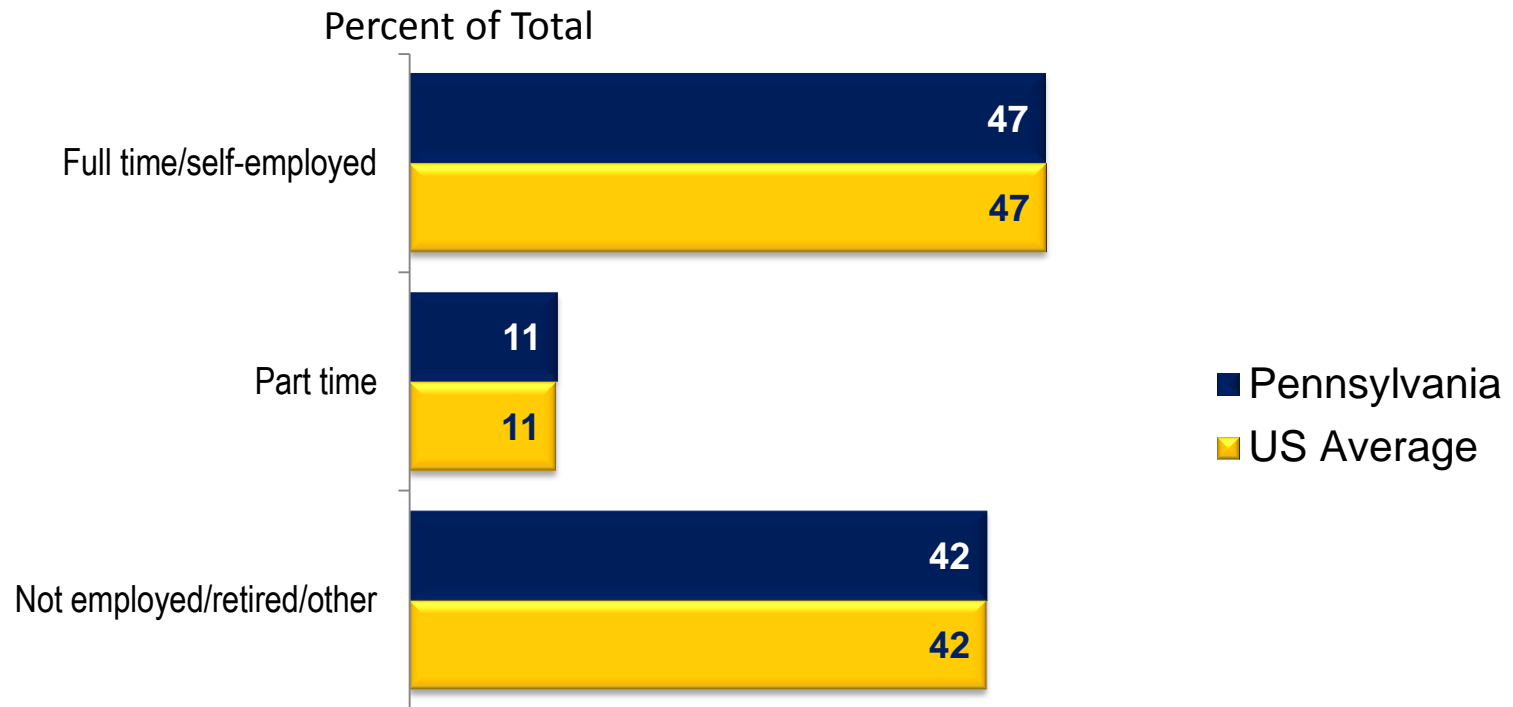
Base: Marketable Day-Trips



Employment



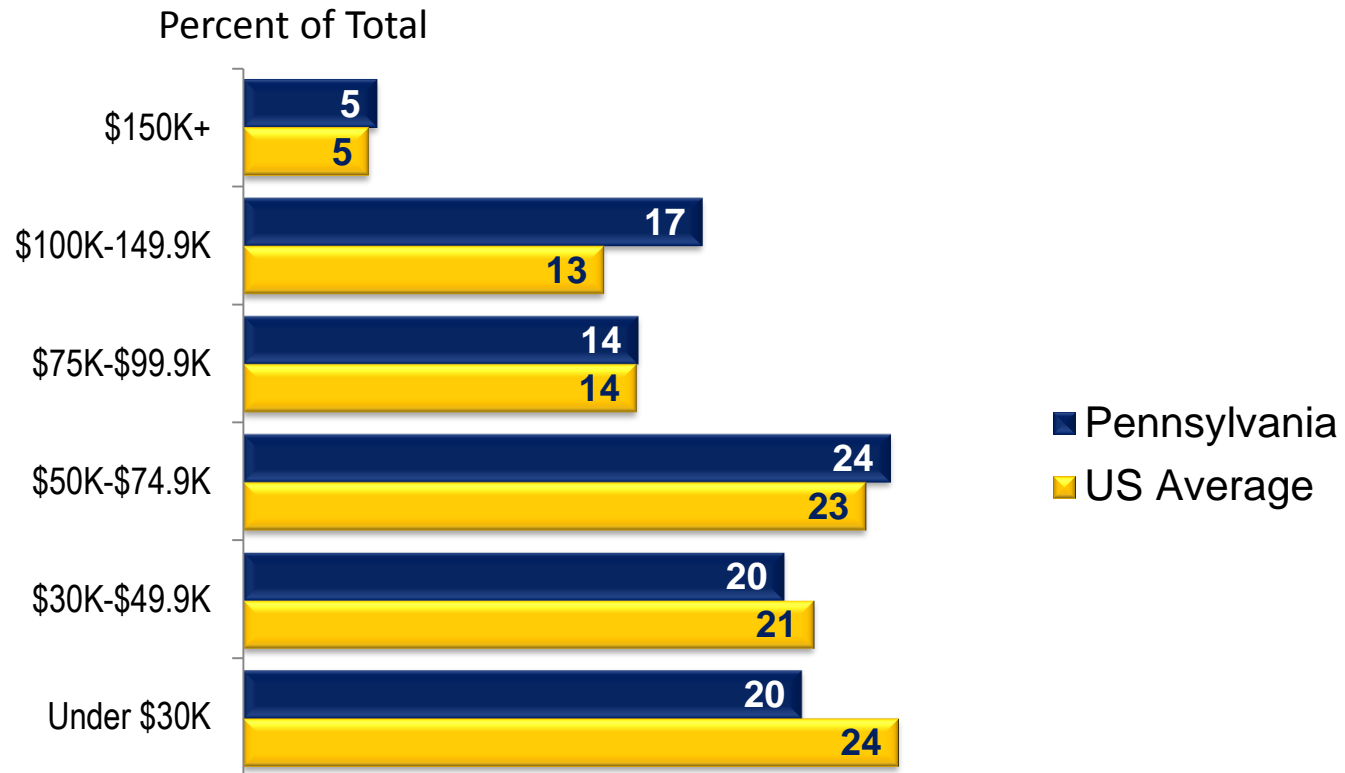
Base: Marketable Day-Trips



Income



Base: Marketable Day-Trips

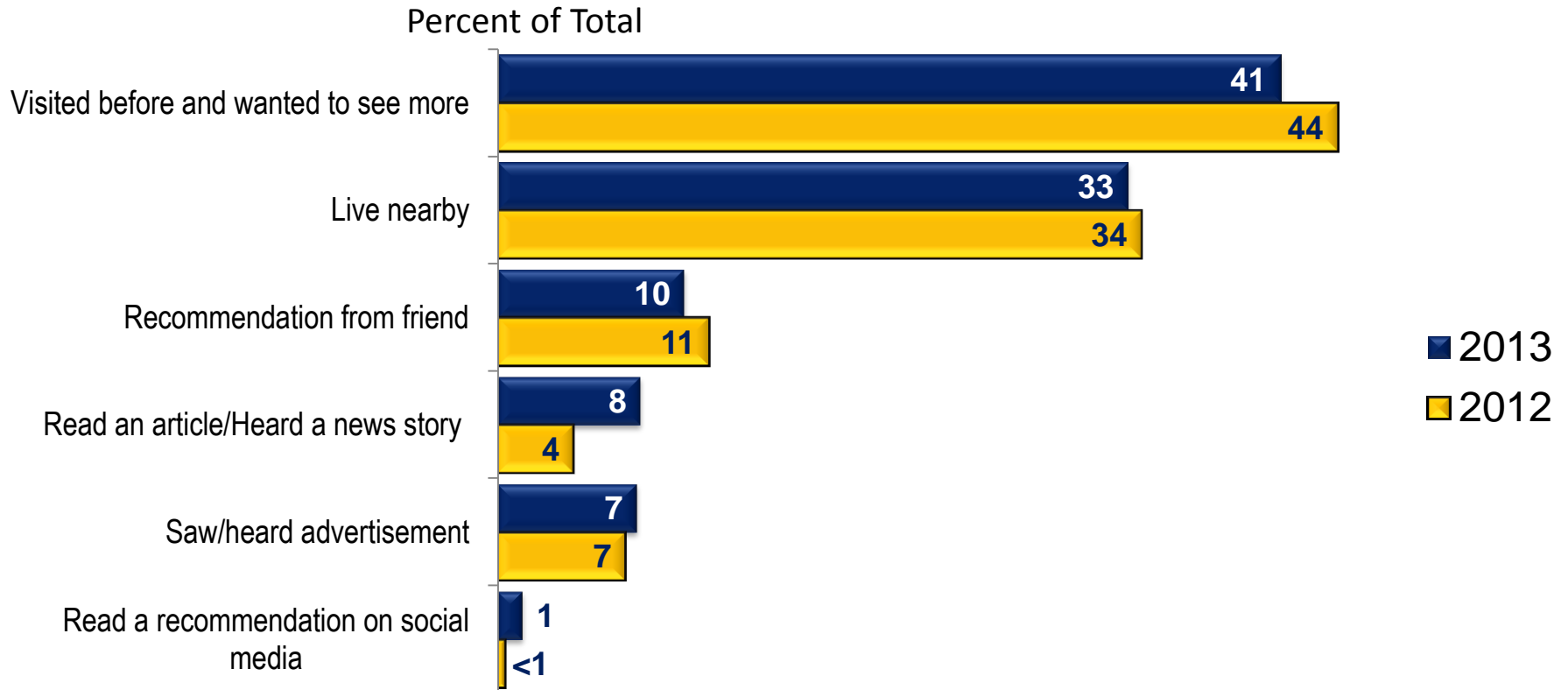


Trip Planning & Booking — Marketable Day-Trips

Main Reason for Choosing Pennsylvania



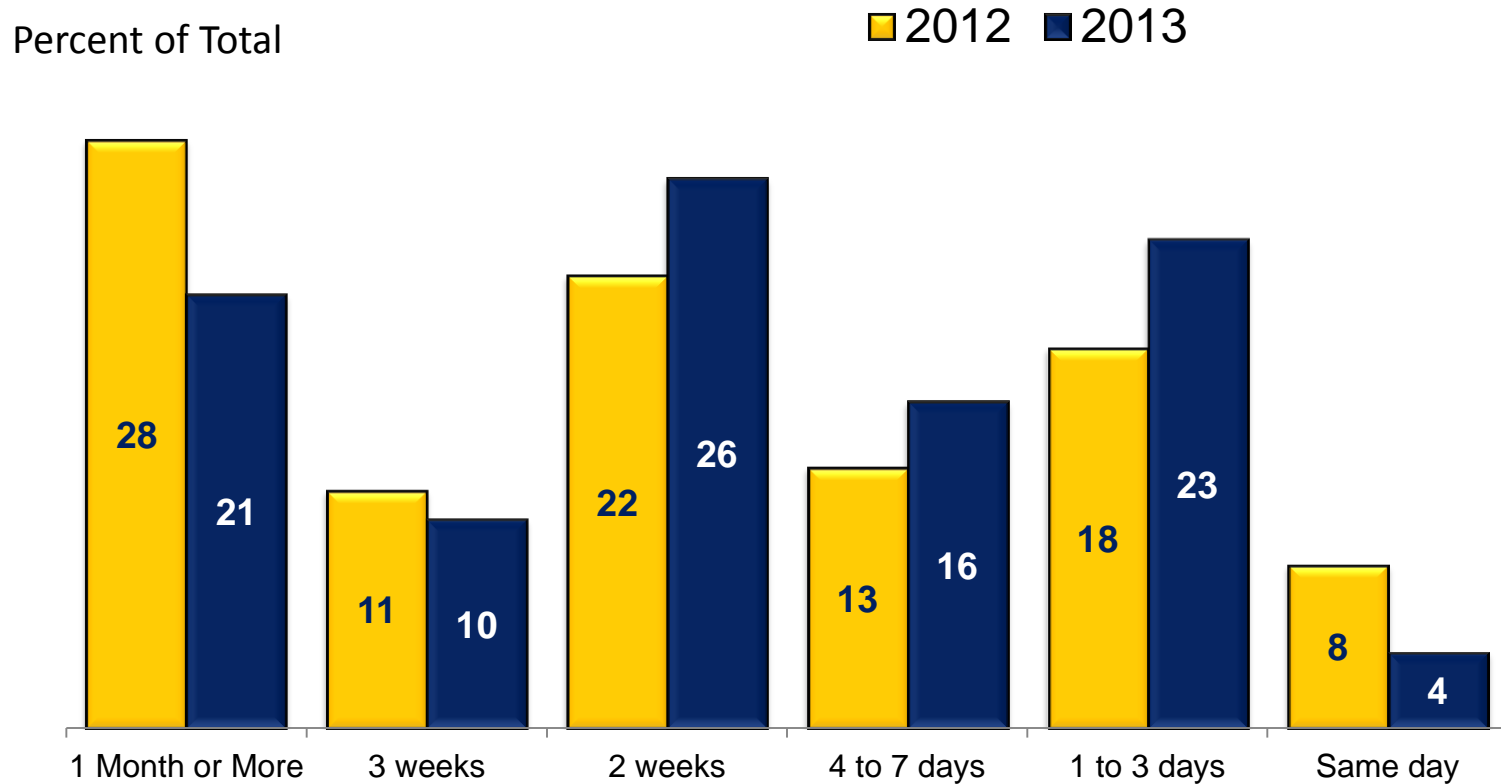
Base: Marketable Day-Trips



Planning Cycle



Base: Marketable Day-Trips

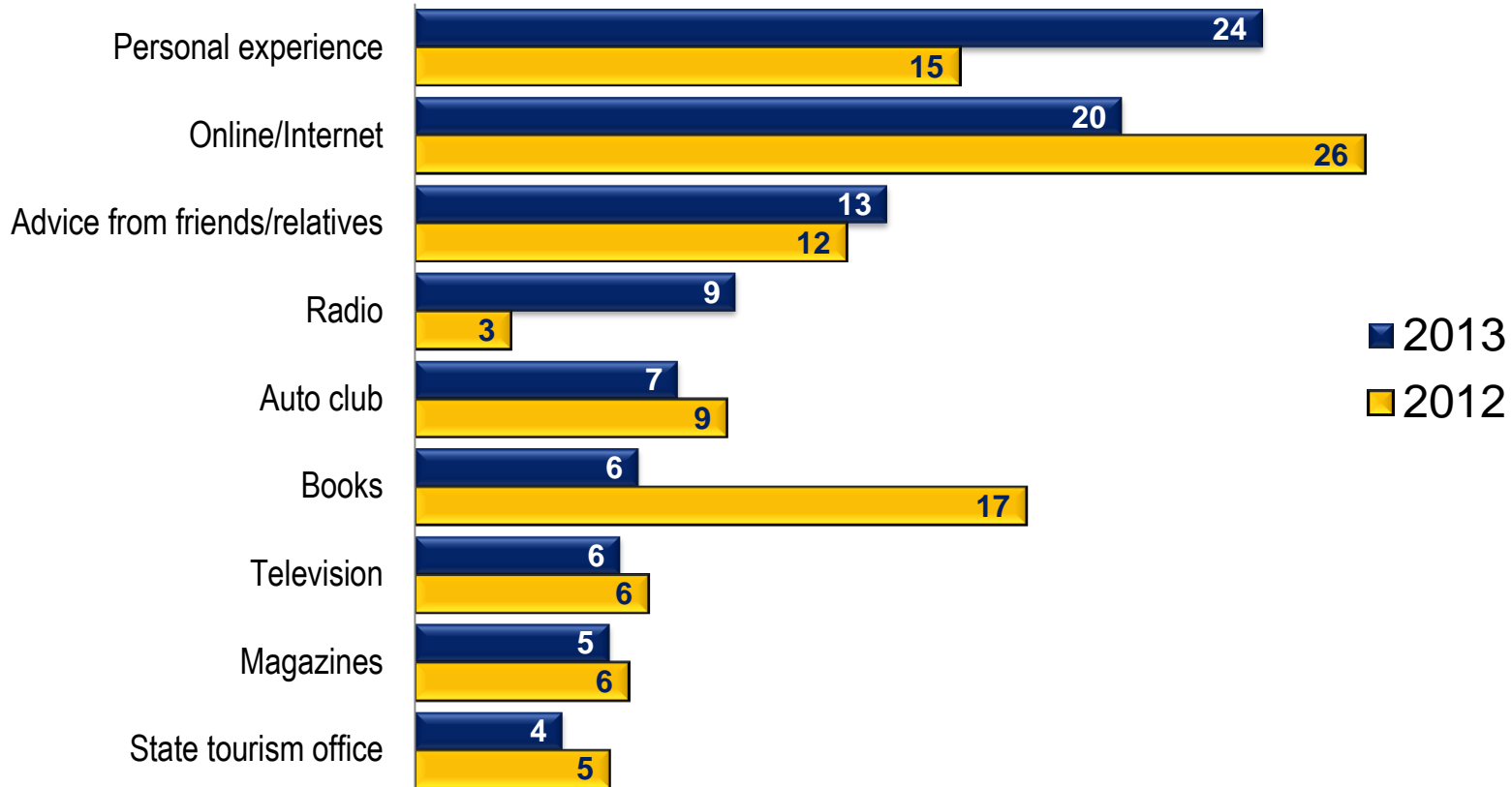


Information Sources Used for Planning



Base: Marketable Day-Trips

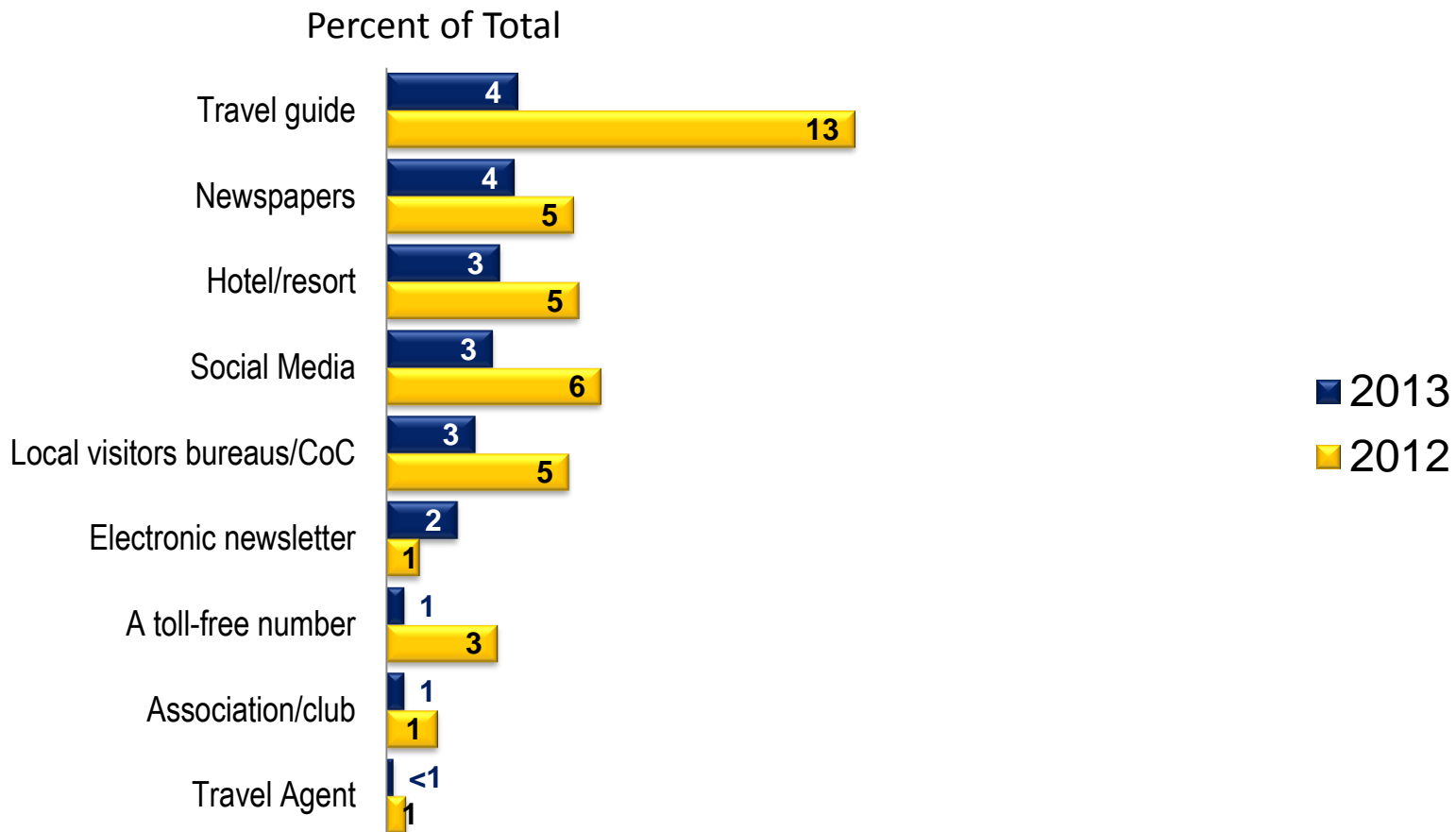
Percent of Total



Information Sources Used for Planning (Cont'd)



Base: Marketable Day-Trips

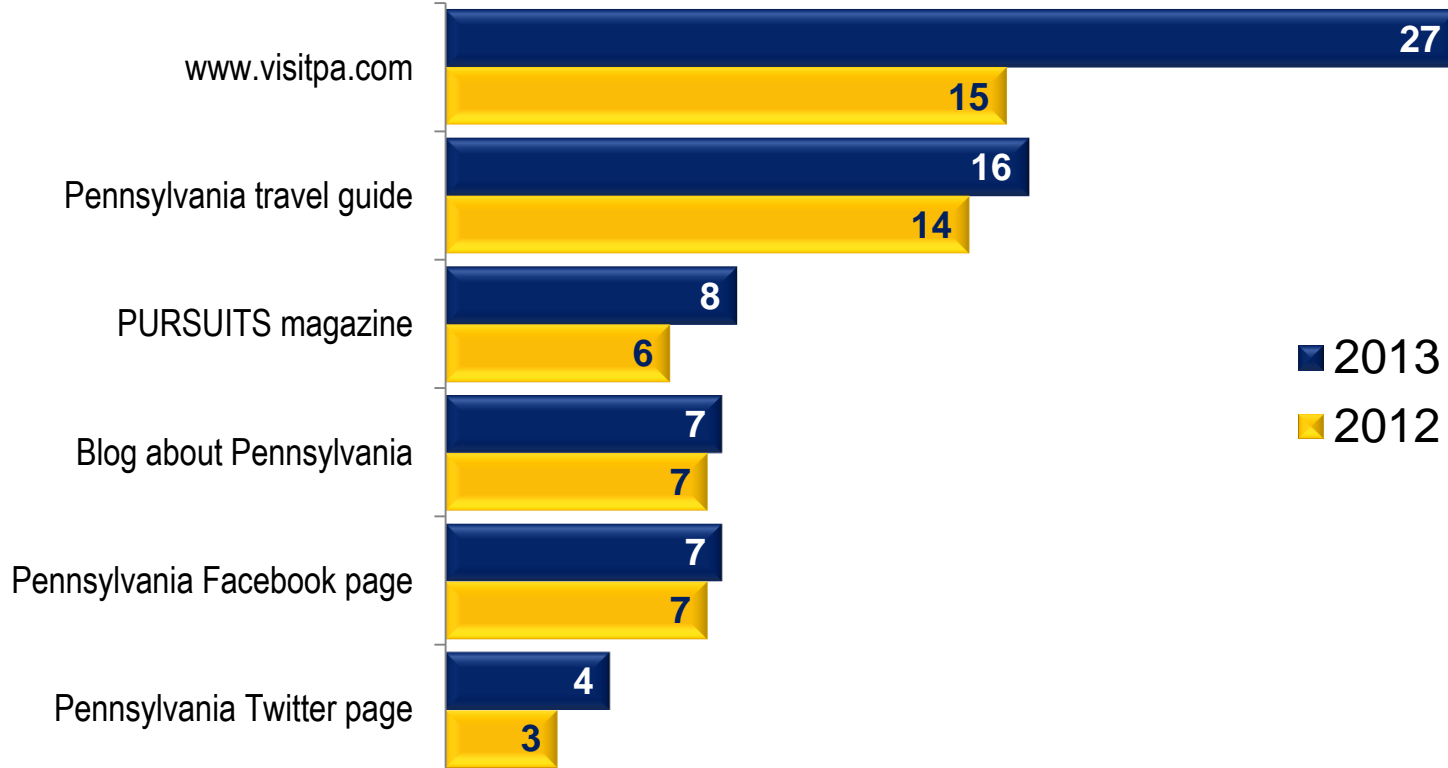


Use of Pennsylvania Trip Planning Tools



Base: Marketable Day-Trips

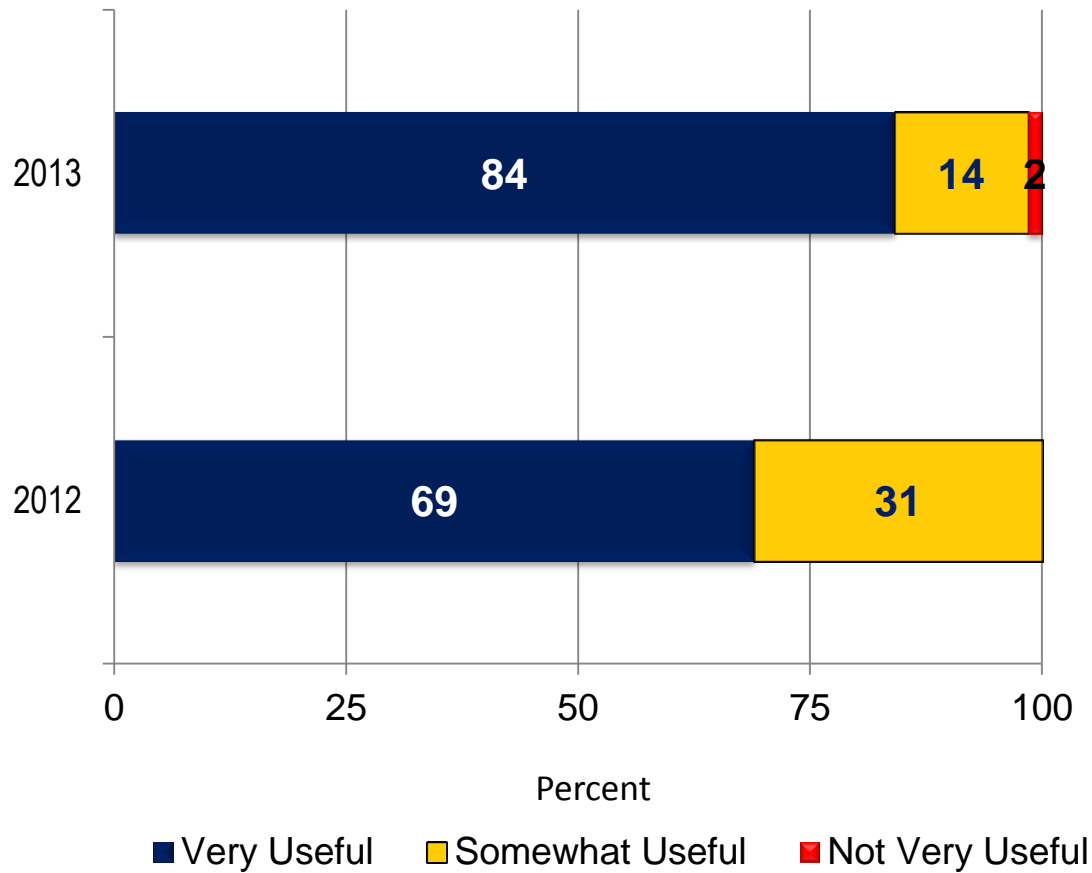
Percent of Total



www.visitpa.com Usefulness



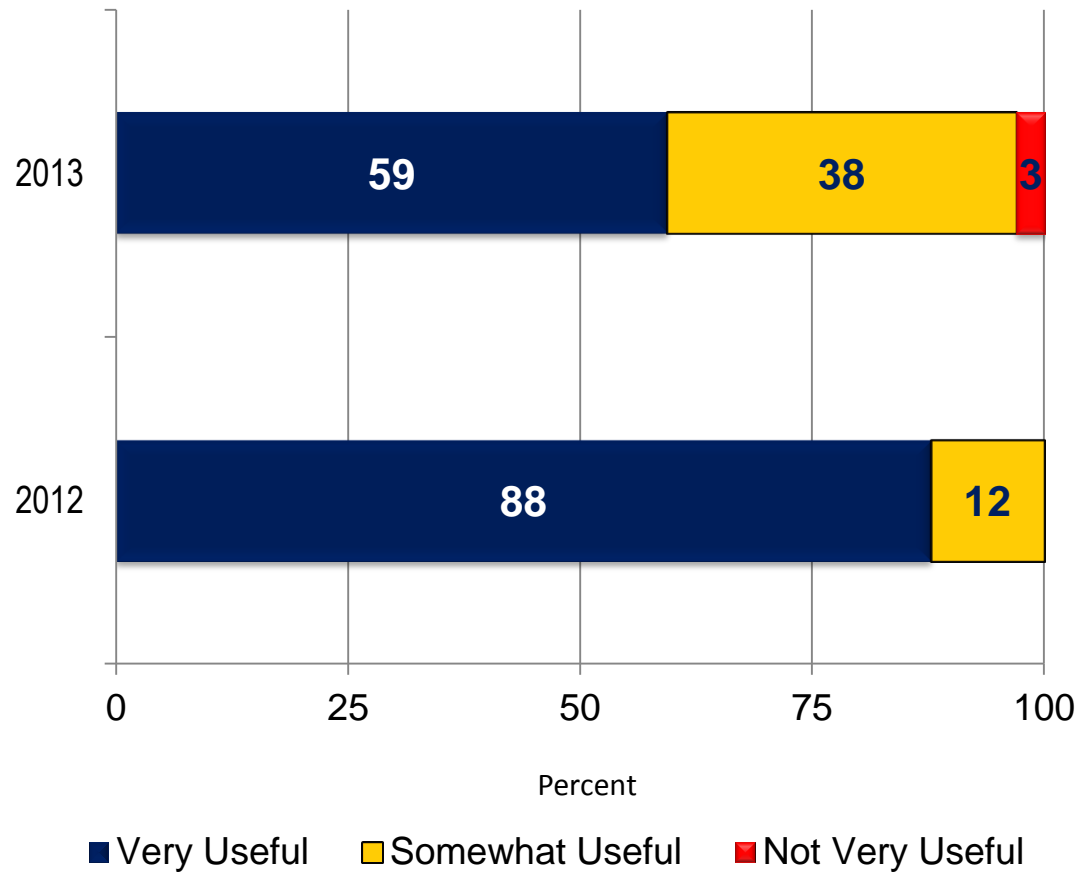
Base: Marketable Day-Trips



Travel Guide Usefulness



Base: Marketable Day-Trips

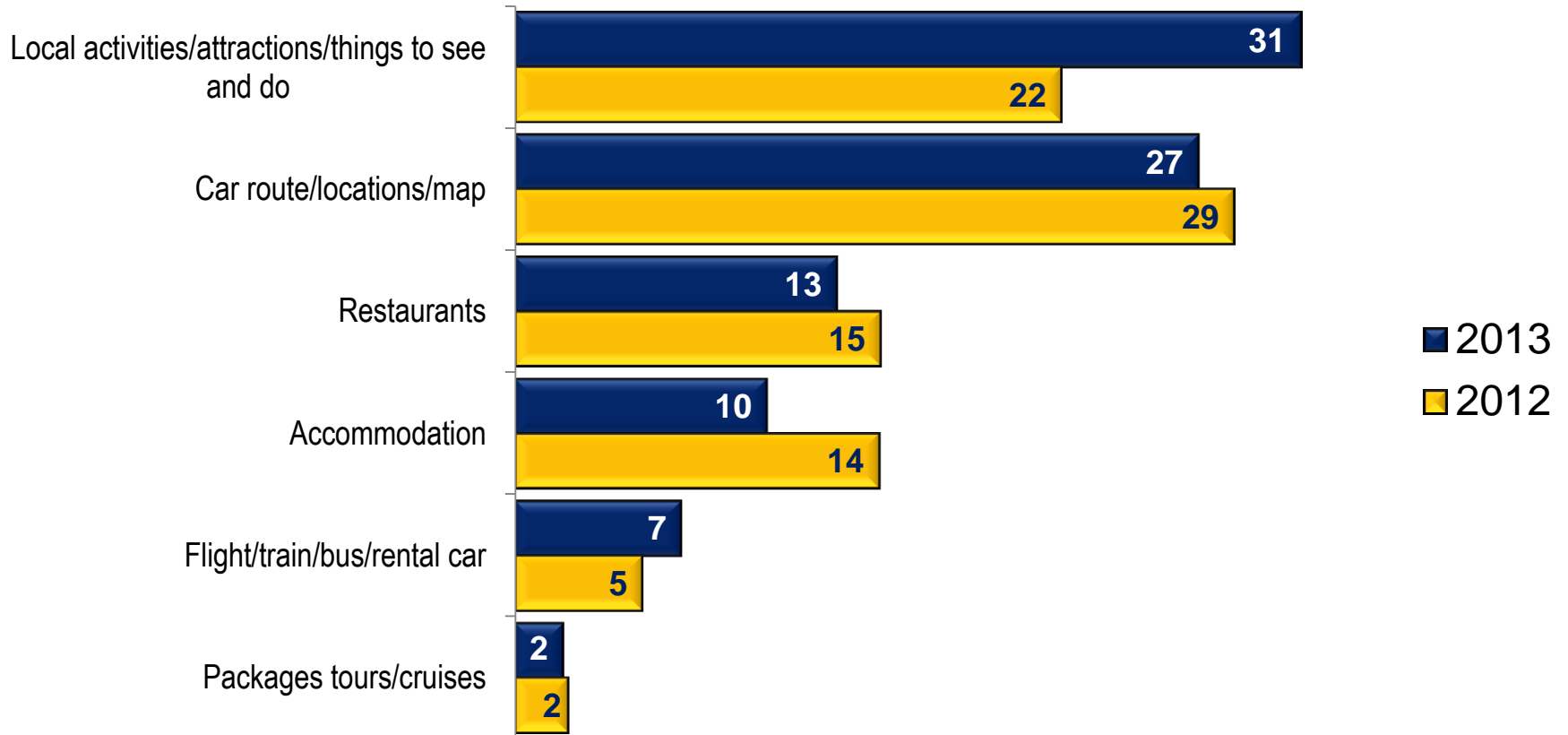


Trip Elements Planned Using Internet



Base: Marketable Day-Trips

Percent of Total

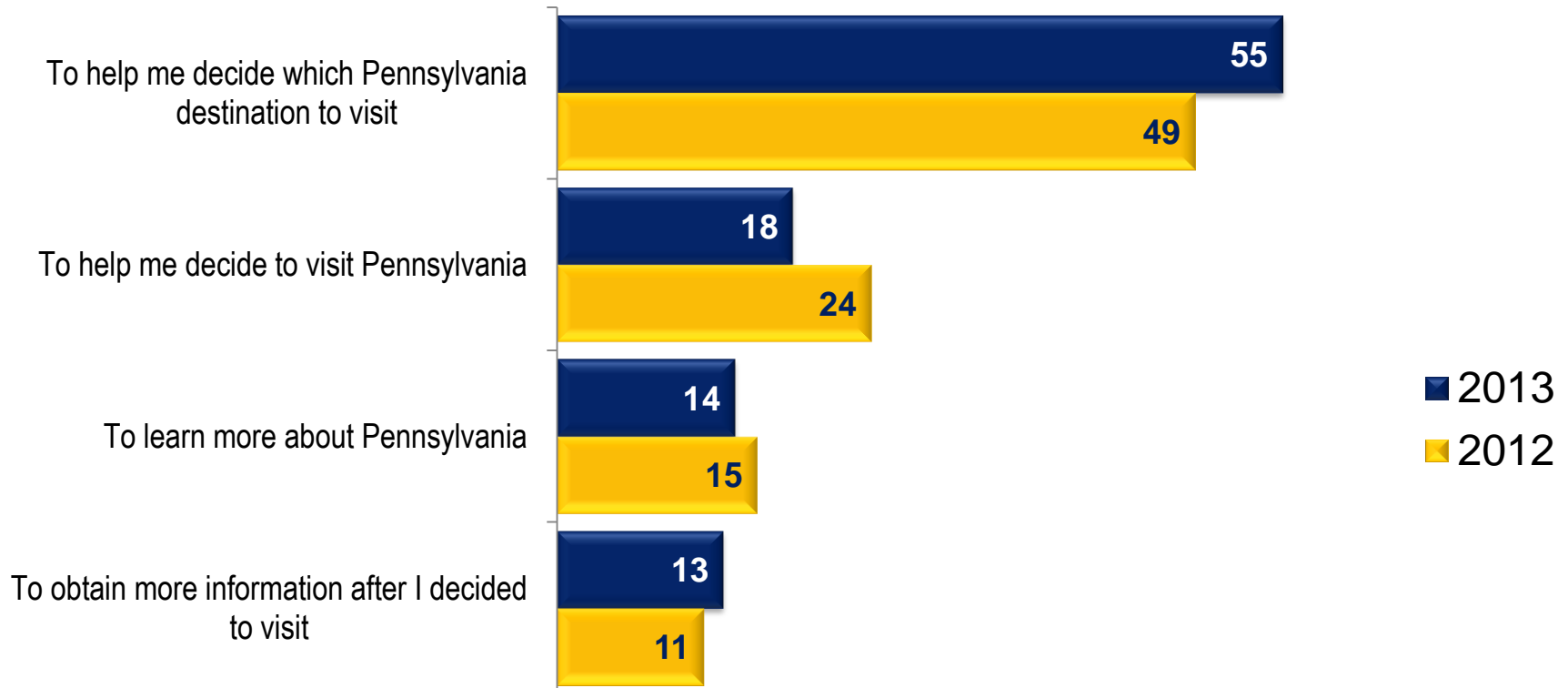


Reasons for Visiting www.visitpa.com



Base: Marketable Day-Trips

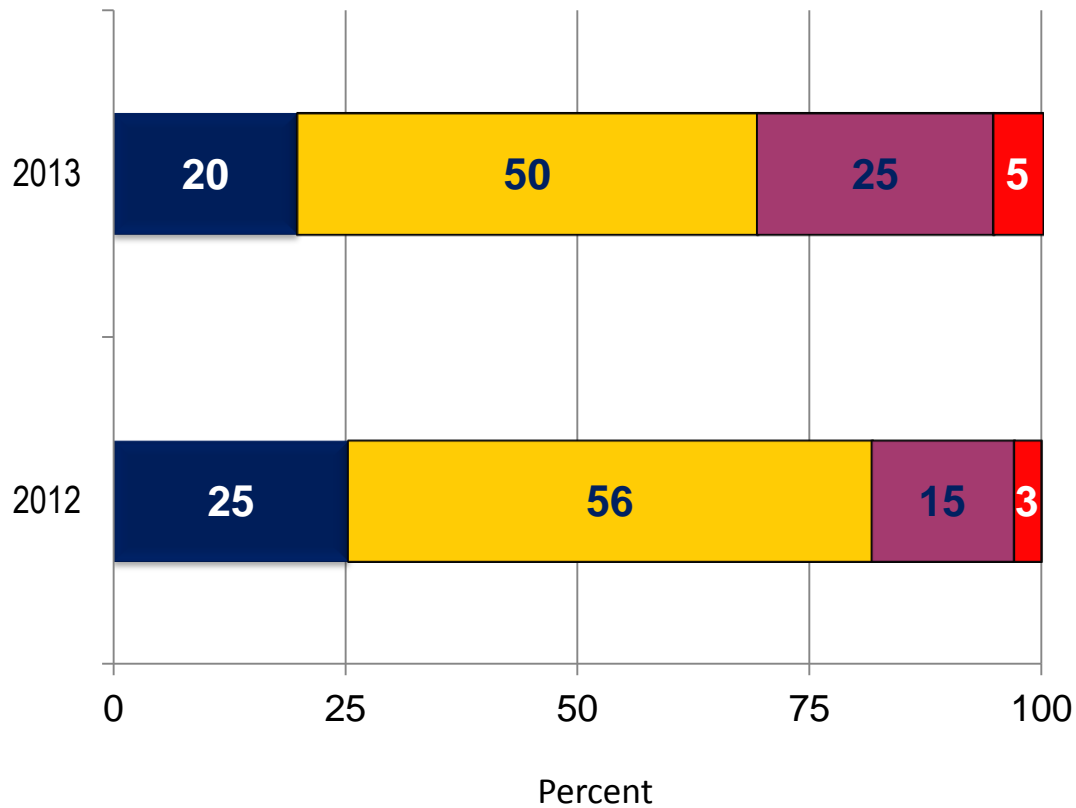
Percent of Total



www.visitpa.com Influence on Planning



Base: Marketable Day-Trips

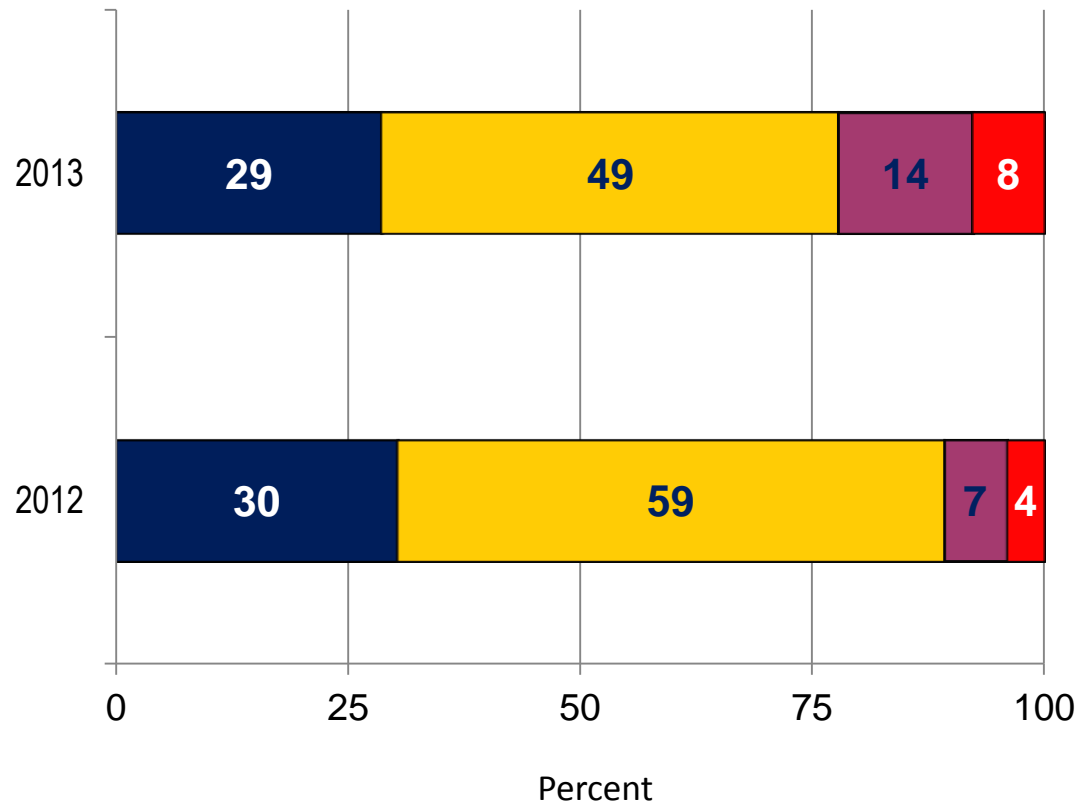


■ Large Influence ■ Some Influence ■ Very Little Influence ■ No Influence

www.visitpa.com Influence on Visitation



Base: Marketable Day-Trips

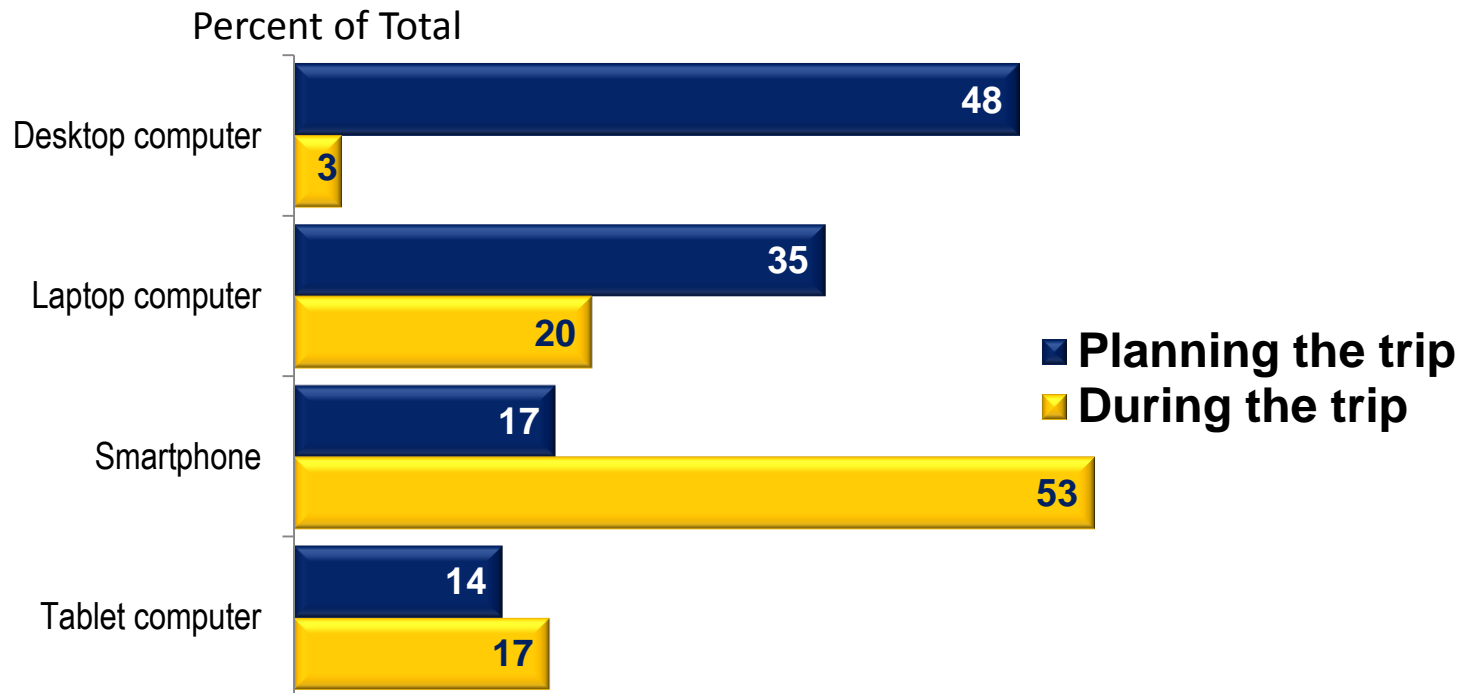


■ Large Influence ■ Some Influence ■ Very Little Influence ■ No Influence

Technology Used by Travelers



Base: Marketable Day-Trips

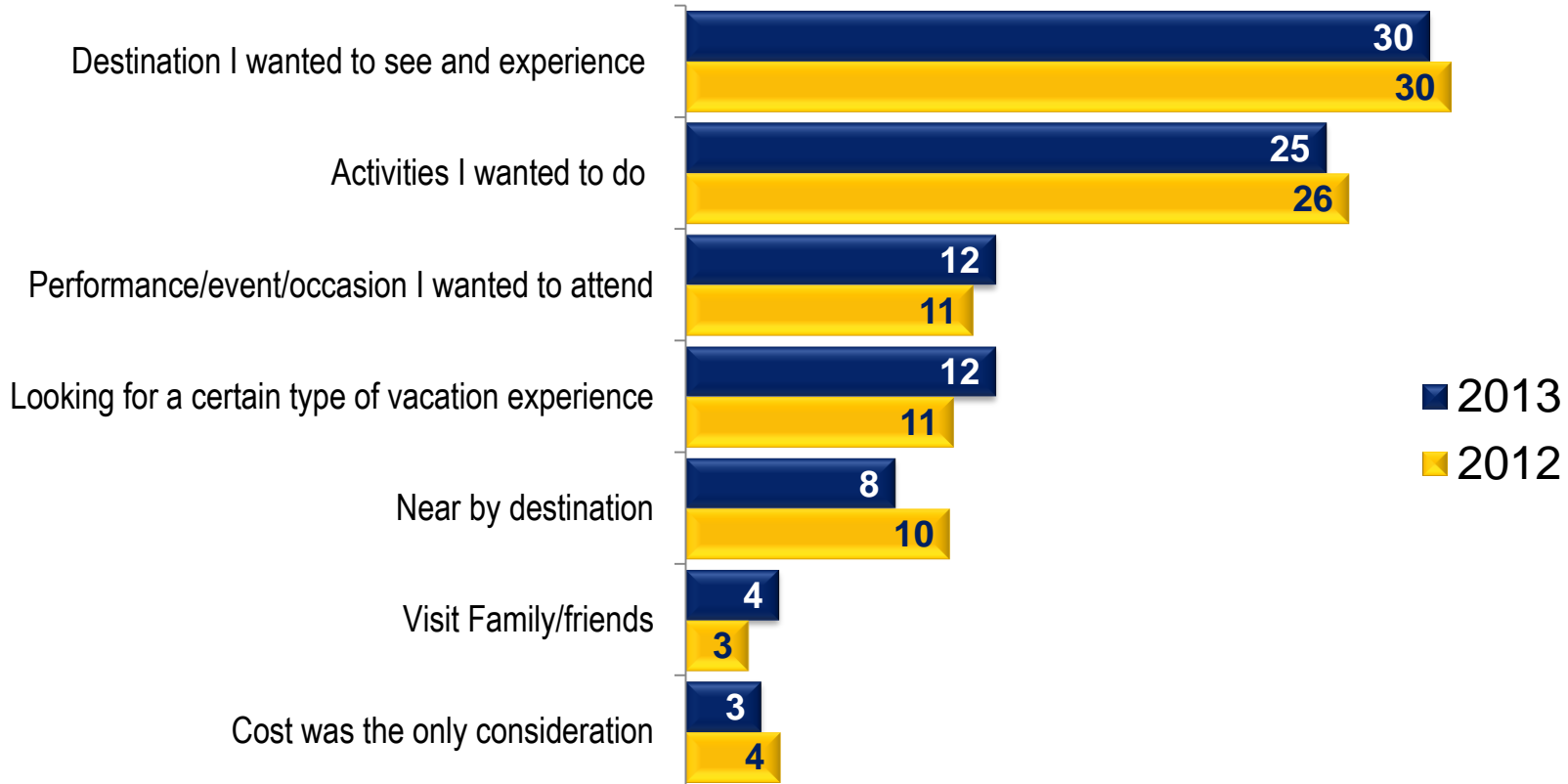


Planning Considerations Beyond Cost



Base: Marketable Day-Trips

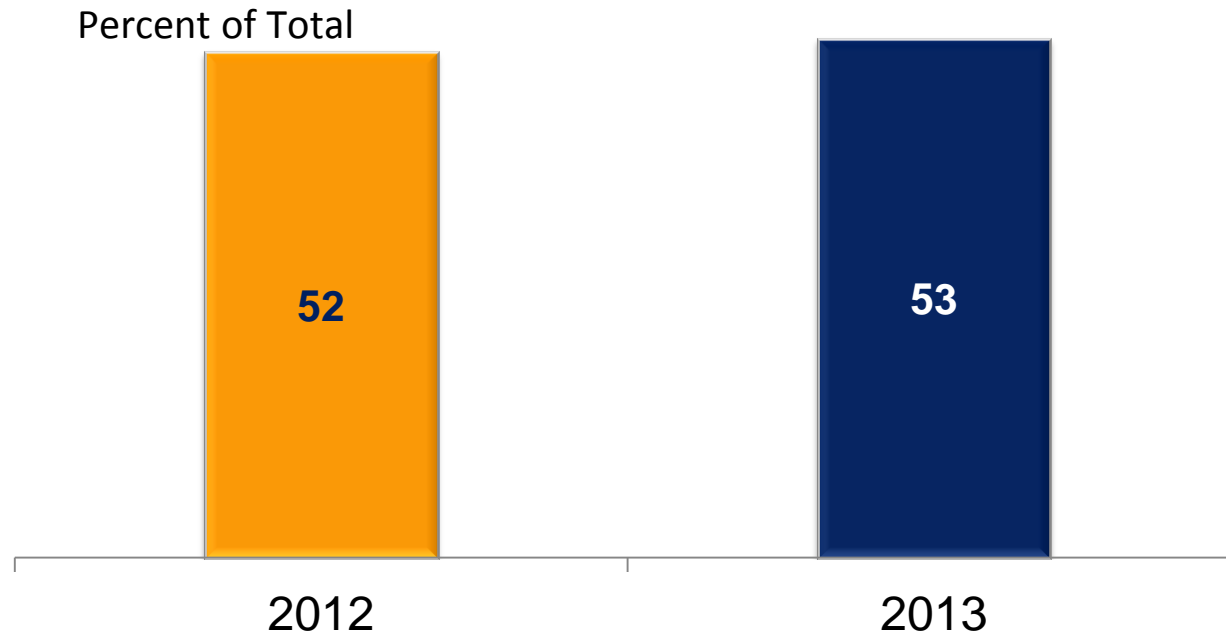
Percent of Total



Percent Who Booked In Advance



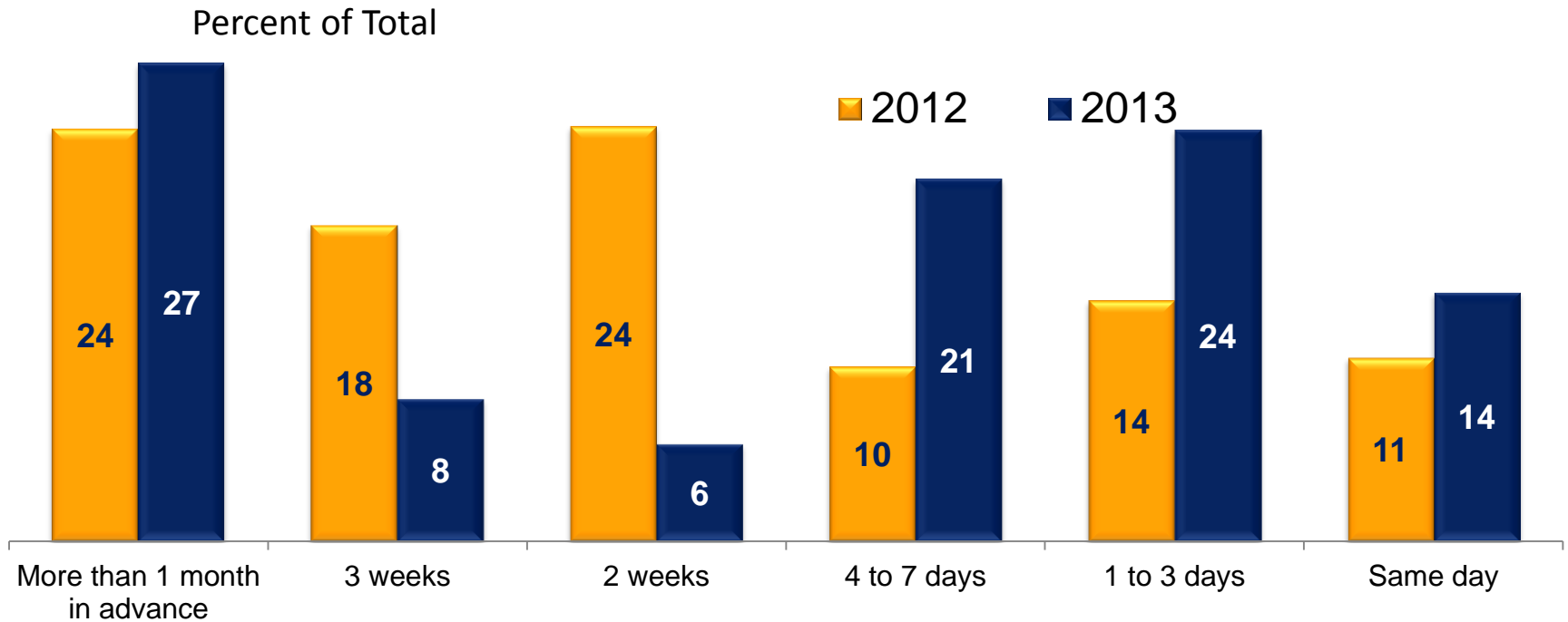
Base: Marketable Day-Trips



Booking Cycle



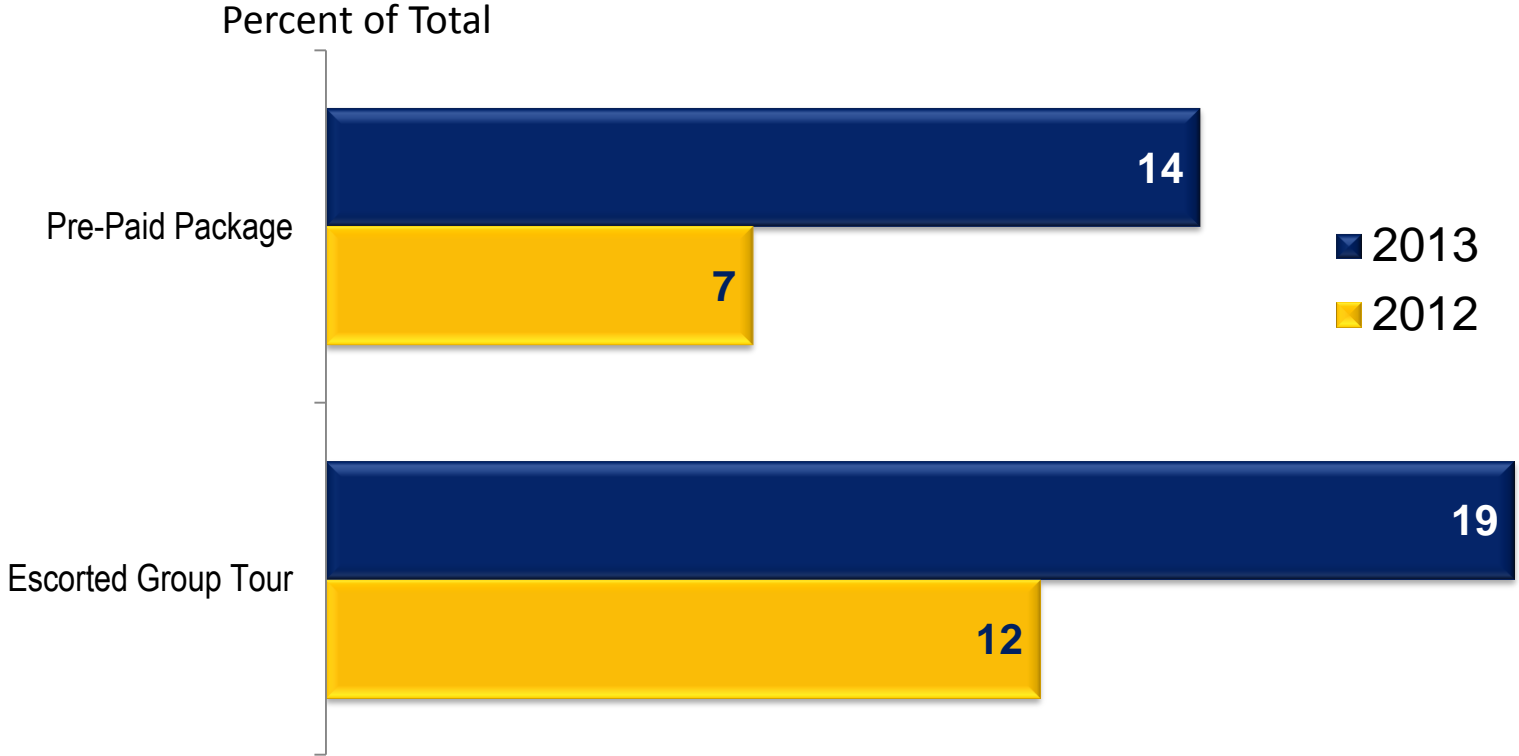
Base: Marketable Day-Trips Booked in Advance



Use of Vacation Packages and Group Travel



Base: Marketable Day-Trips

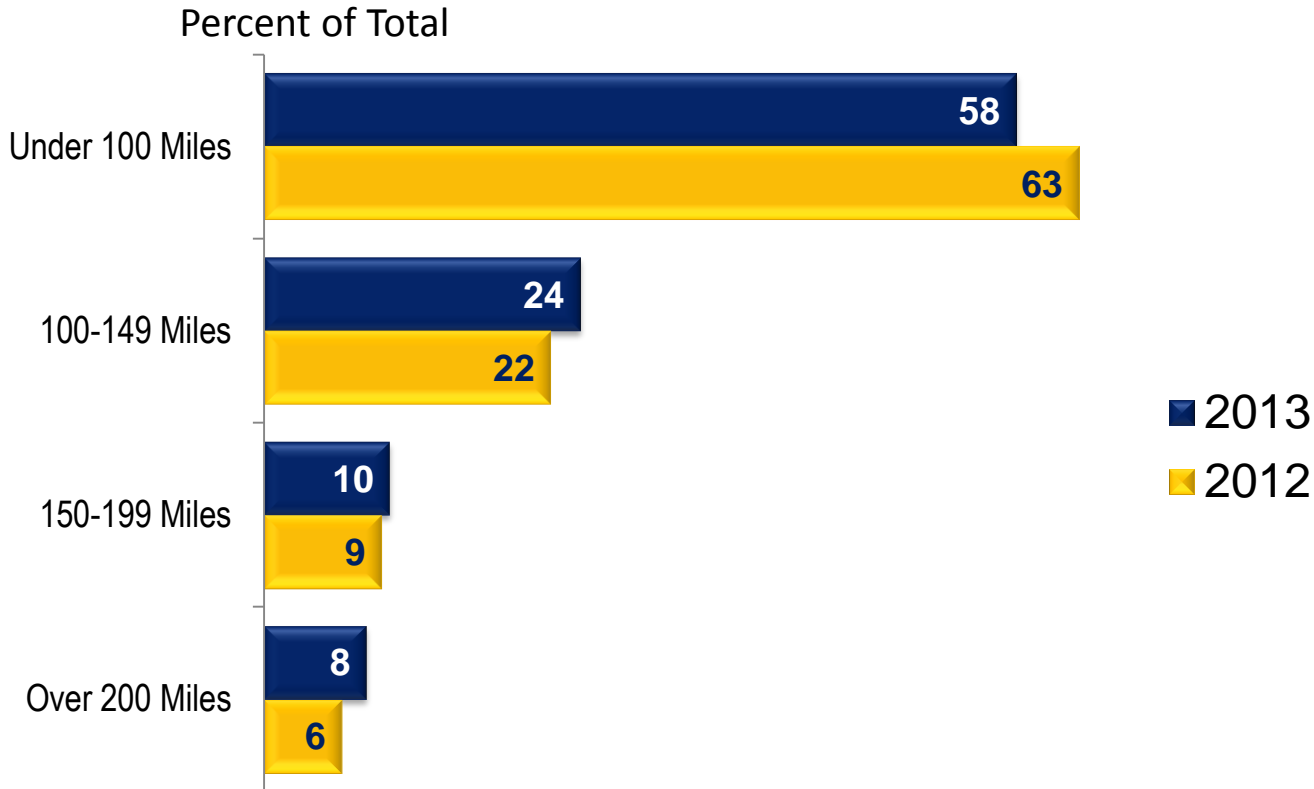


Marketable Day-Trip Characteristics

Distance Traveled for Pennsylvania Day-Trip



Base: Marketable Day-Trips

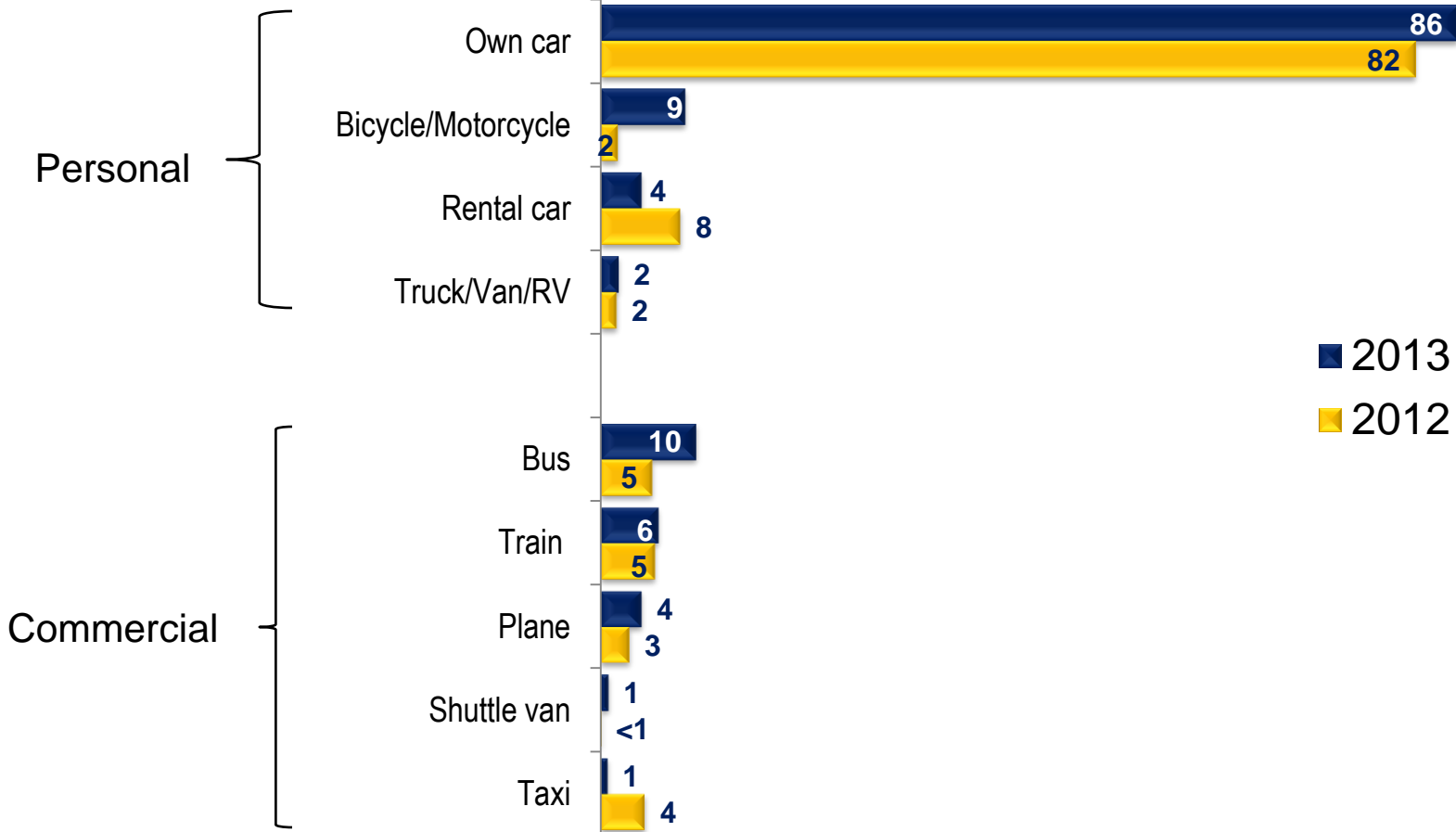


Transportation Used to Enter Pennsylvania



Base: Marketable Day-Trips

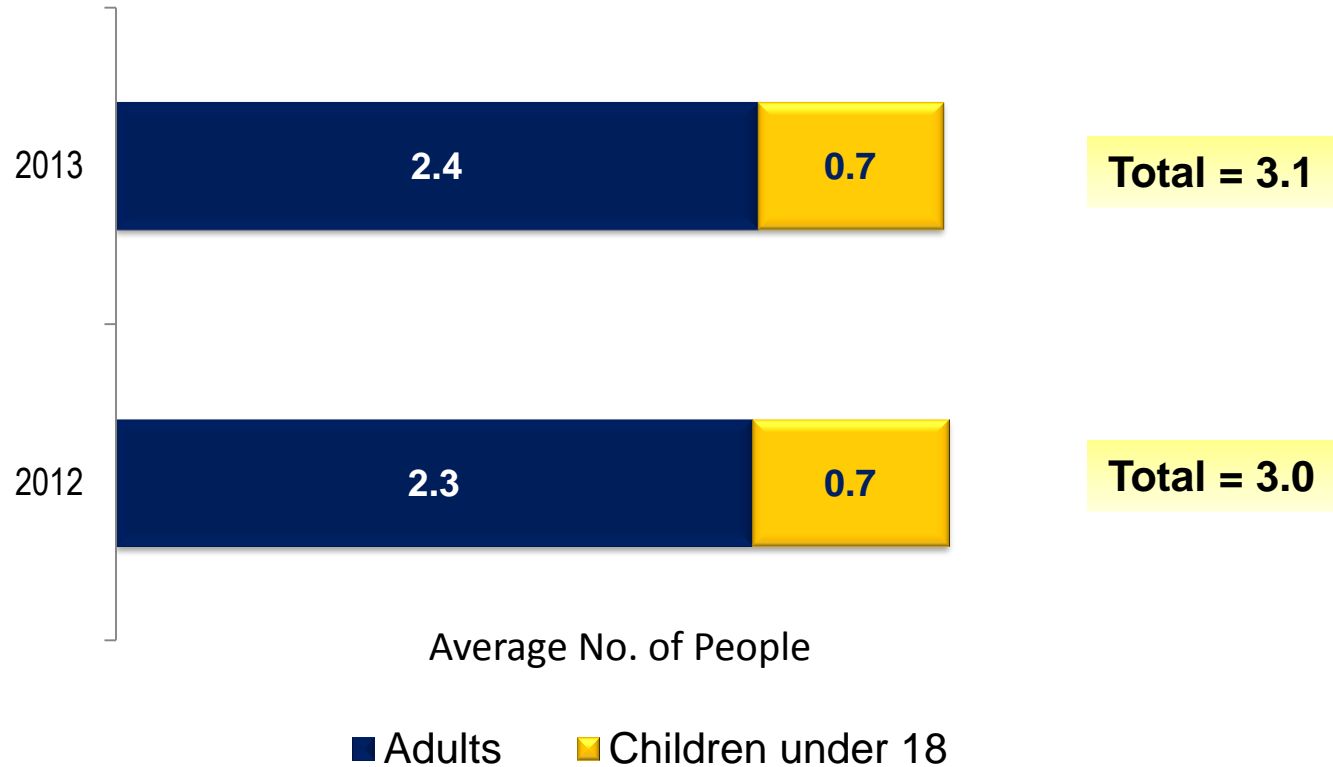
Percent of Total



Size of Travel Party



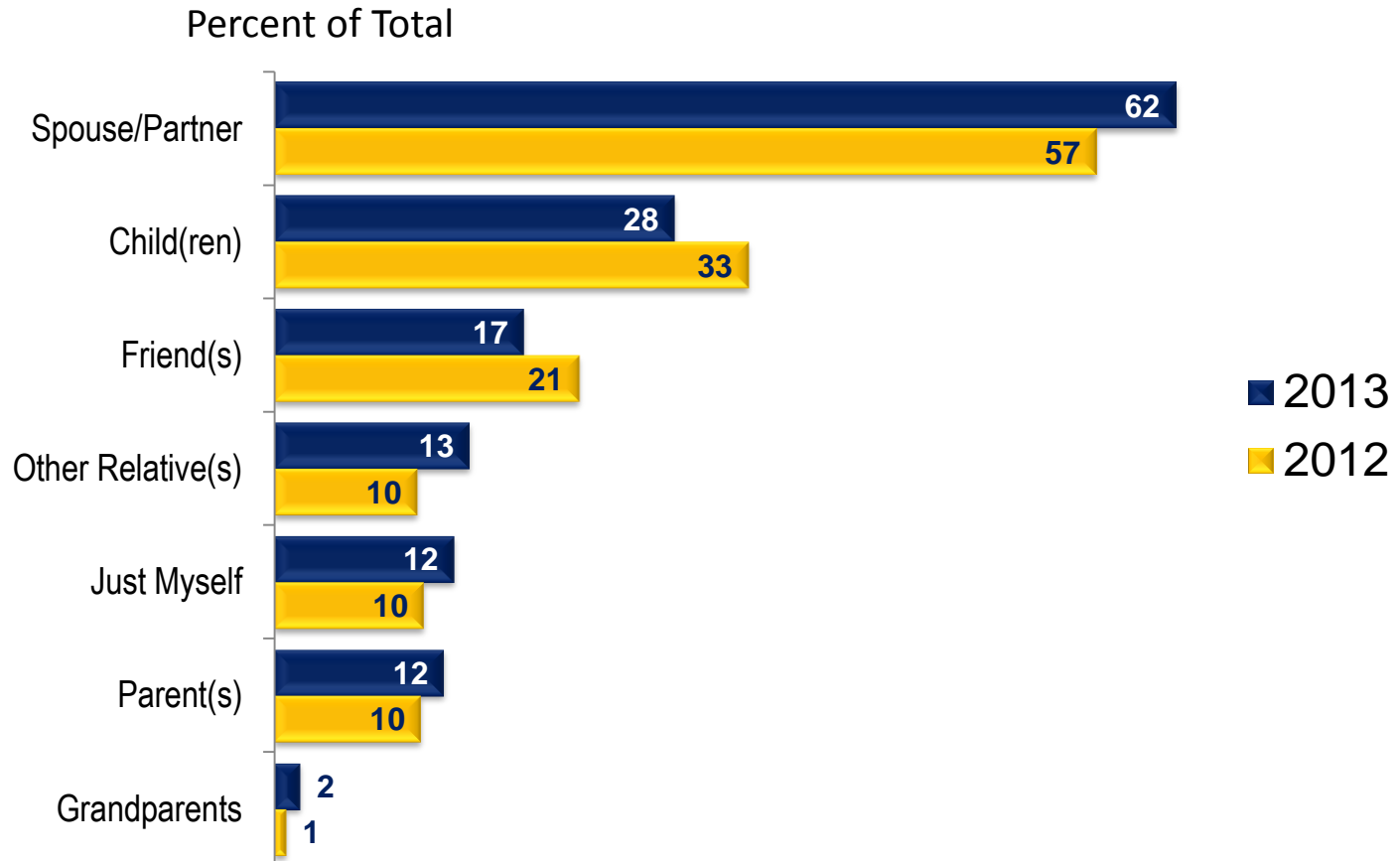
Base: Marketable Day-Trips



Composition of Travel Party



Base: Marketable Day-Trips



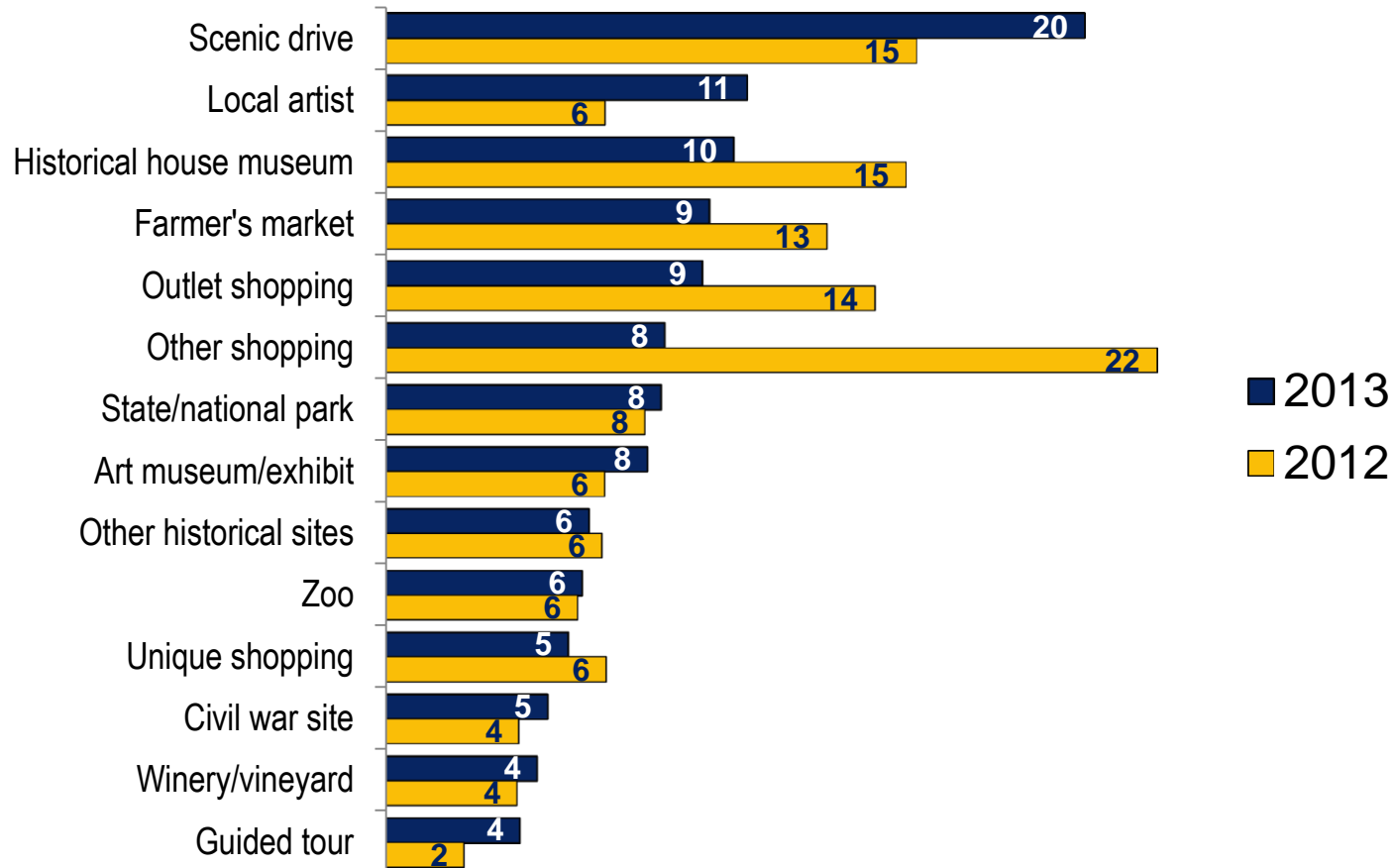
Trip Experiences — Marketable Day-Trips

Things Seen and Experienced on Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total

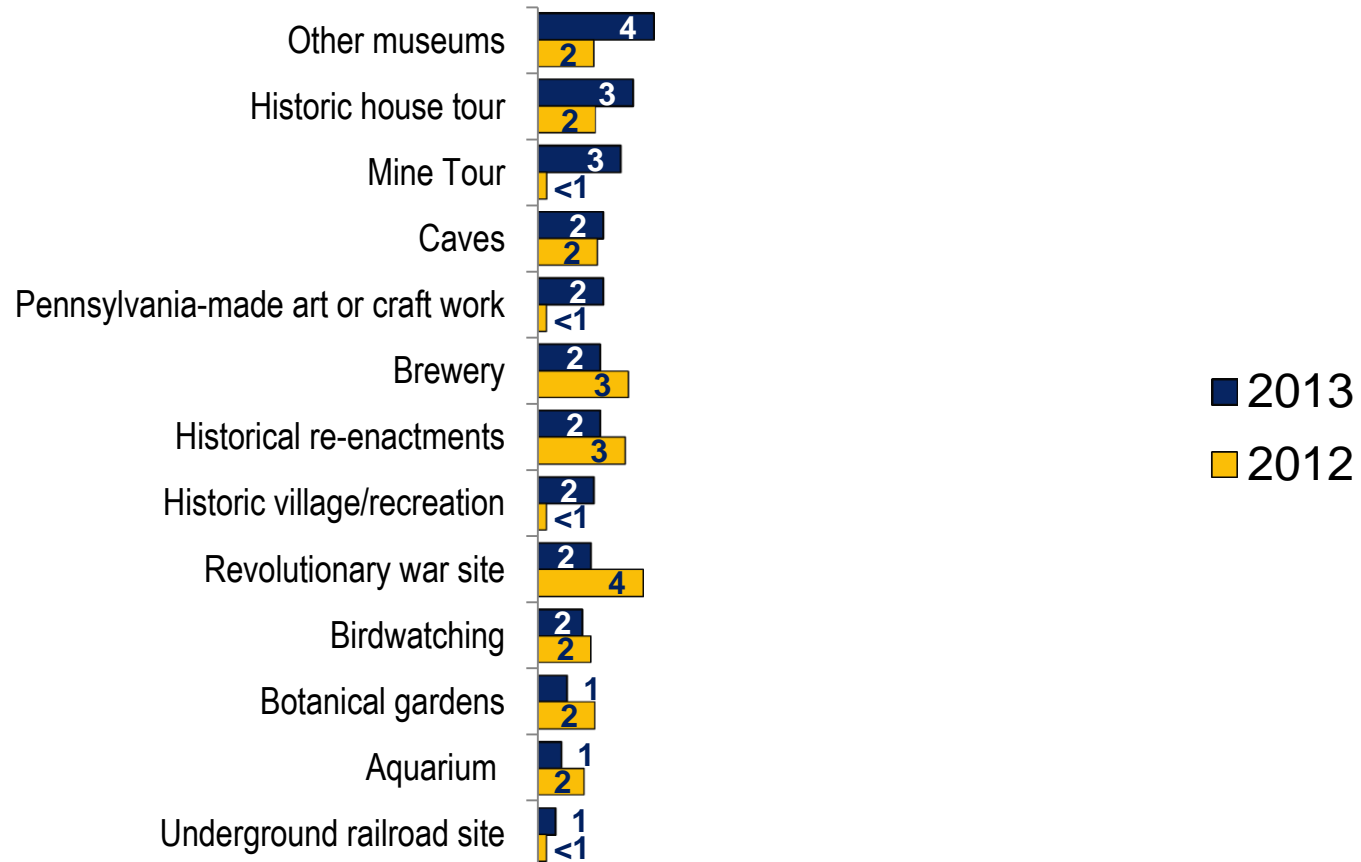


Things Seen and Experienced on Pennsylvania Day-Trip (Cont'd)



Base: Marketable Day-Trips

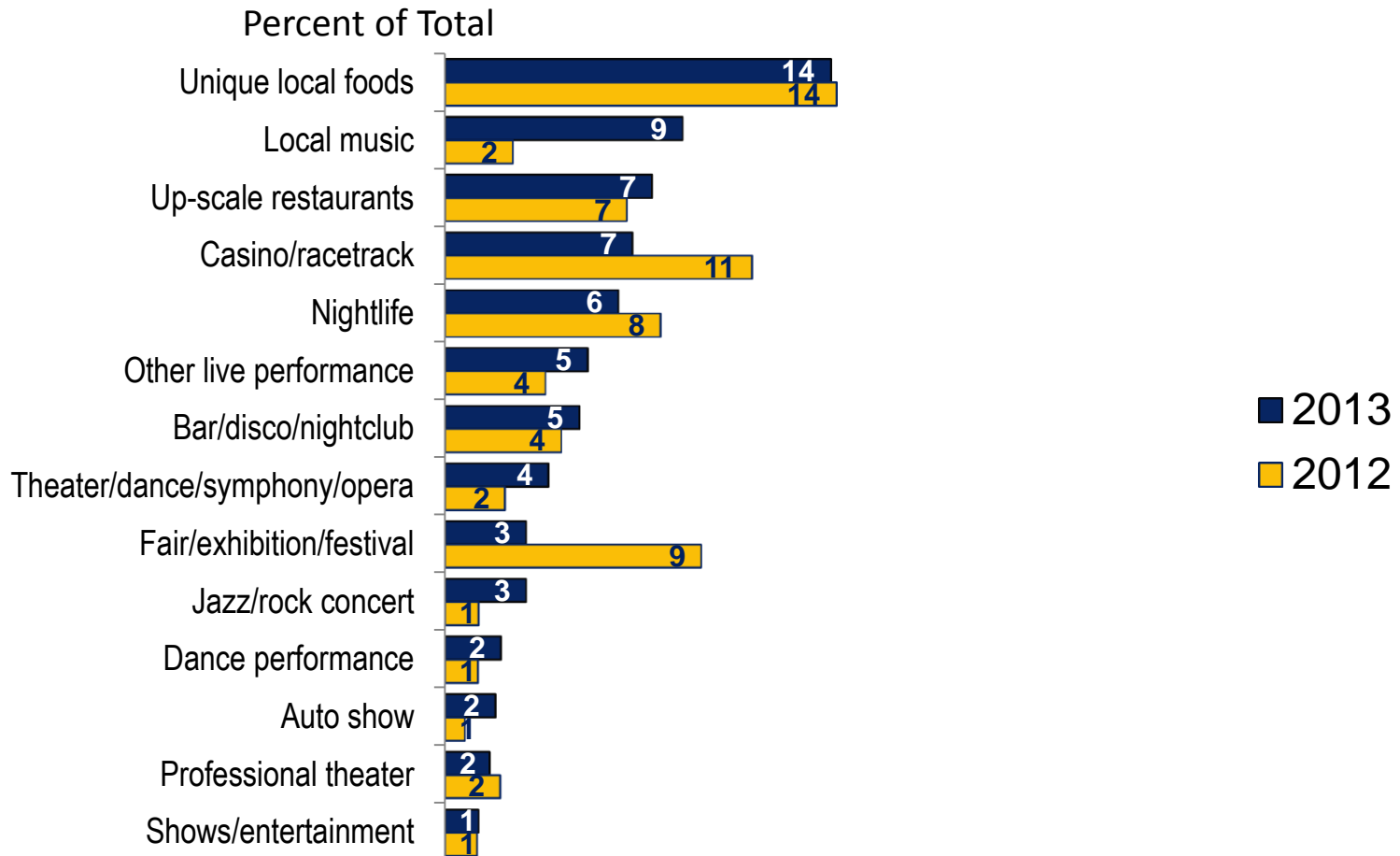
Percent of Total



Dining/Entertainment



Base: Marketable Day-Trips

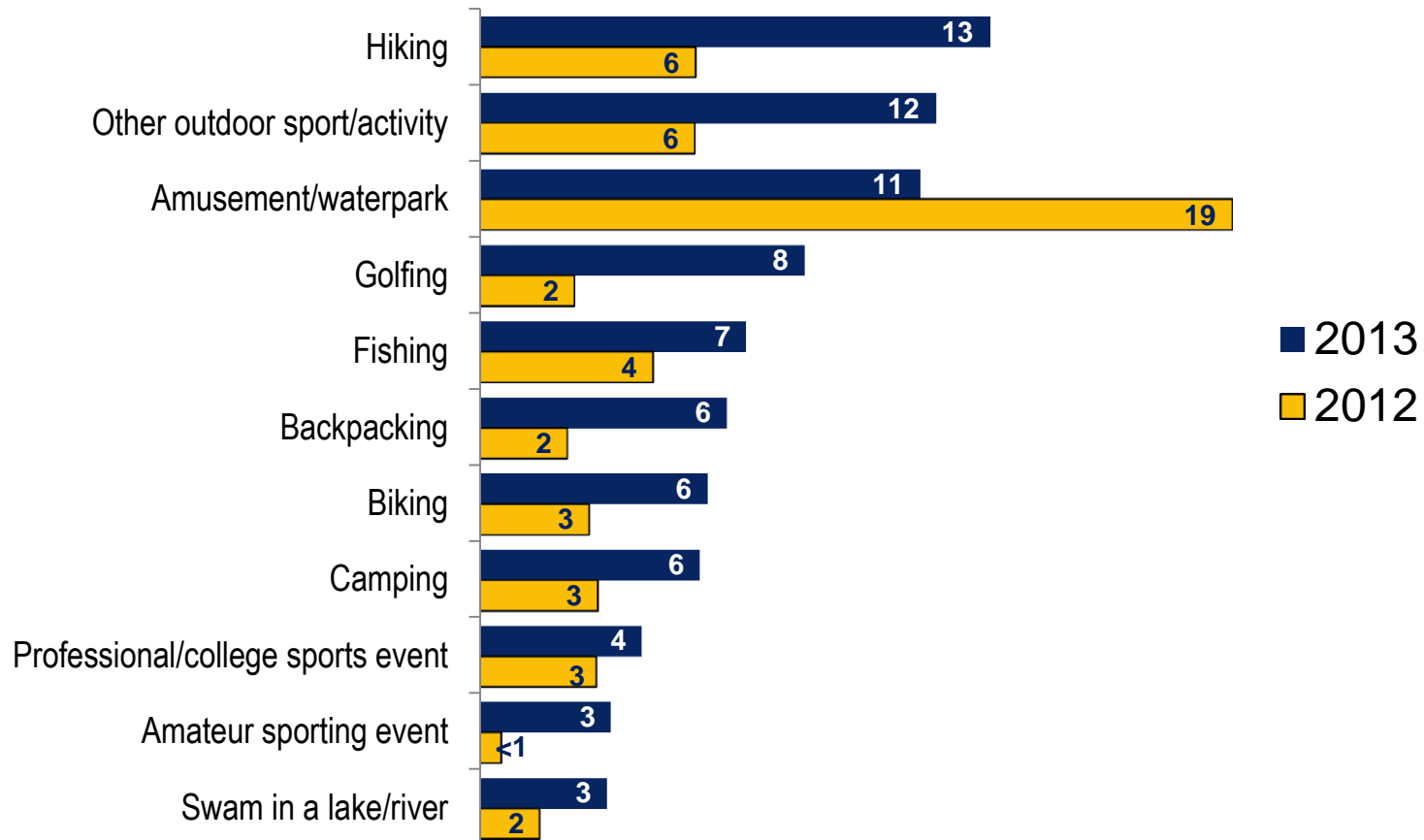


Sports and Recreation



Base: Marketable Day-Trips

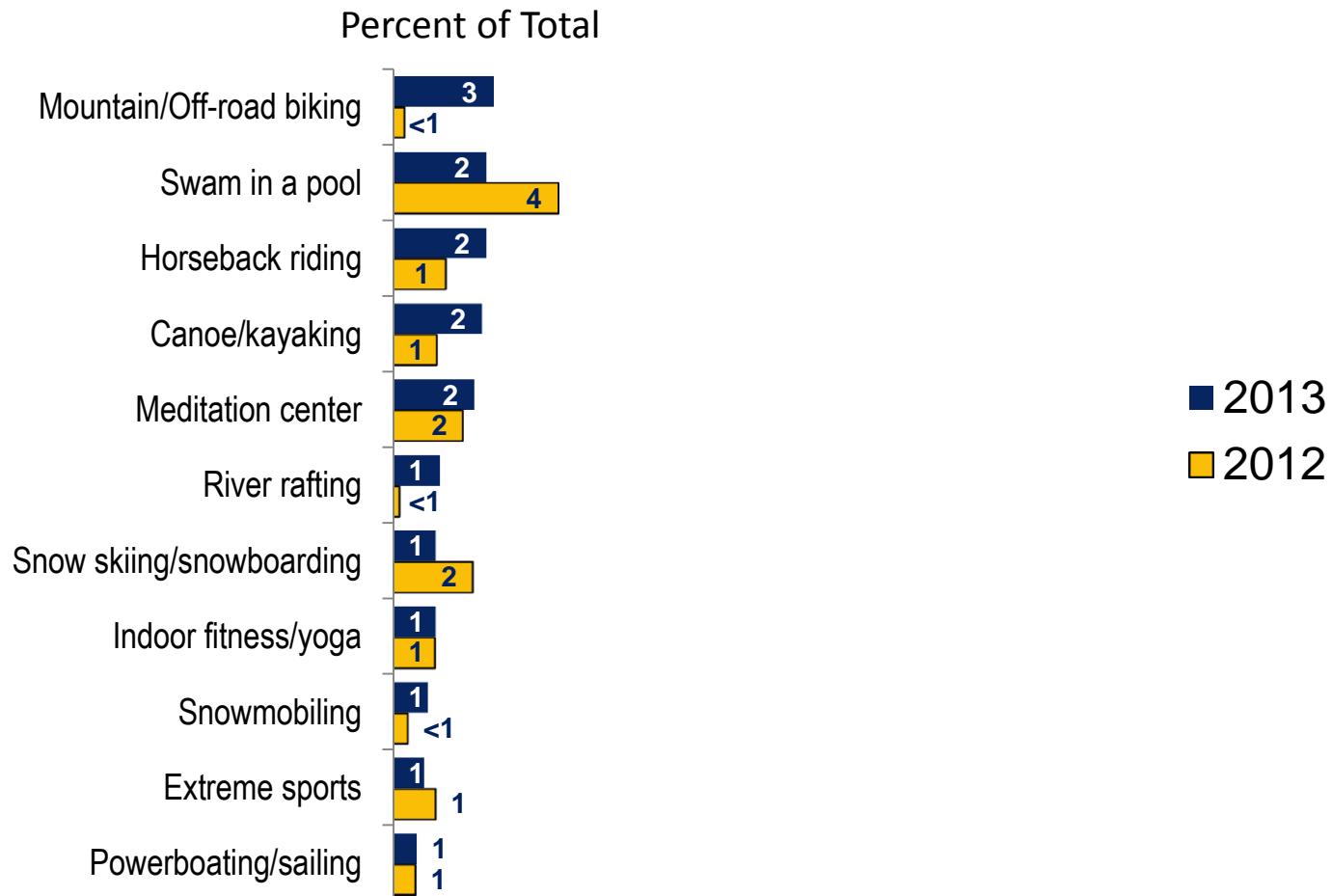
Percent of Total



Sports and Recreation (Cont'd)



Base: Marketable Day-Trips



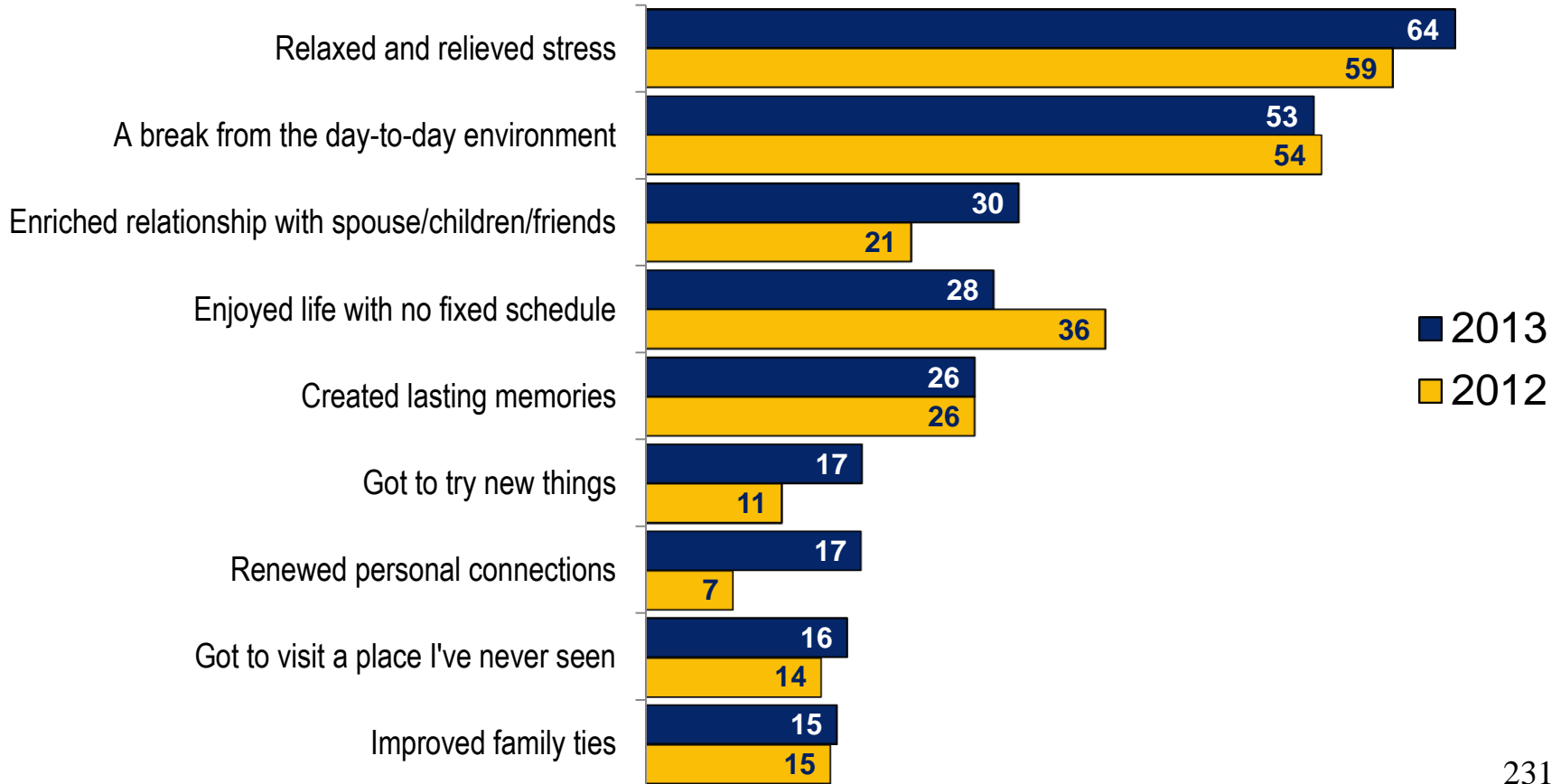
Trip Benefits — Marketable Day-Trips

Benefits From Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total



Benefits From Pennsylvania Day-Trip (Cont'd)



Base: Marketable Day-Trips

Percent of Total

