

**Pennsylvania
Annual Traveler Profile
2014 Travel Year**

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Introduction



2014 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 of dollars in tax revenues for the state and local communities.
- In 2014, Pennsylvania hosted an estimated 190.4 million travelers (as measured in person-trips) from throughout the U.S. – a number that was little changed (+0.3%) from the estimated 189.8 million travelers in 2013.
- The 0.6 million increase in PA's total visitor volume was derived completely from the overnight segment, specifically the VFR (visiting friends/relatives) component, while the total number of day-trip travelers was unchanged.
- Nationally, total overnight visitor volume grew 3.5%, reaching a new record high of over 1.5 billion travelers.

Research Method



The research for this report was conducted by Longwoods International.

The results consist of:

- *Estimates of the volume of overnight travel for the U.S.*
- *Estimates of the volume of overnight and day-trip 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 U.S. 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 2014 travel year, this produced 302,910 trips for analysis nationally – 206,720 for the overnight segment and 96,190 for day trips.

Research Method (cont'd)



- The **Travel USA**[®] program identified 7,756 survey respondents who visited Pennsylvania on an overnight trip in 2014 and 5,876 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 impressions of Pennsylvania's tourism product.
- There were 2,300 total responses for the overnight segment and 1,119 for the day-trip segment from this return sample.
- Estimates of Pennsylvania's 2014 overnight and day-trip visitor 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's proximity to major population centers and its unique mix of major historic, cultural, outdoor, and recreation/entertainment events, attractions, and amenities appeal to a wide range of travelers from throughout the U.S.

- Pennsylvania hosted an estimated 190.4 million travelers in total in 2014, a slight increase (0.3%) from 2013.
- Roughly a third of travelers (65.4 million) stayed overnight during their PA trip, also a small increase (0.9%) from 2013. This was well below the 3.5% growth rate in overnight travel nationwide.
- Pennsylvania's growth rate for overnight travel has underperformed the U.S. average for many of the past several years, growing at a rate (9%) roughly half that of the U.S. average (17%) between 2009 and 2014.
- The remaining 125.0 million travelers to and/or within Pennsylvania in 2014 were on a day-trip – the same number as in 2013.

Executive Summary – Overnight Totals



People visit Pennsylvania for a variety of reasons, but for those who stayed overnight, visiting friends and relatives (VFR) was the most popular reason.

- VFR travel accounted for nearly half (49%) of the state's overnight total – or approximately 32 million travelers. This was above the 43% average for U.S. travelers nationwide.
- Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second main reason for travel to and/or within PA in 2014, accounting for 39% of overnight travel, or close to 26 million travelers – below the U.S. average of 44%.
- Business and business-leisure travelers accounted for the remaining 8 million of Pennsylvania's overnight travelers, or 12% of the state total for overnight travel and just below the 13% U.S. average.

Executive Summary – Day Trip Totals



Travelers visiting the state on a day-trip were far more likely to be traveling for purely leisure purposes than the overnight segment.

- Marketable trips (i.e., leisure trips that may be influenced by marketing) was the main reason for day-trip travel to and/or within PA in 2014 accounting for 55%, or an estimated 69 million, of day-trip travelers, which was well above the percentage (39%) for the state's overnight travel segment .
- VFR travel accounted for 36% of the state's day-trip total, or an estimated 45 million travelers, vs. 49% for the overnight segment.
- Business and business-leisure travelers accounted for the remaining 10.9 million, or 9% of the state's 125 million day-trip total.

Executive Summary – Who Visits PA?



PA travelers in the marketable overnight segment were typically middle-aged, well-educated, married, and had children under age 18 living at home in 2014.

- Pennsylvania's marketable overnight travelers had a median age of 42.7 years, which was slightly above the U.S. median (41.9), but below that of the state's marketable day-trip travelers (45.2).
- Almost two-thirds of PA's overnight and day-trip travelers were married or with a partner – essentially equal to the U.S. averages.
- The vast majority of the state's marketable overnight and day-trip travelers held at least a college degree or had attended college.
- The median household income of the state's 2014 marketable overnight travelers was \$62,750 – down from 2013 and below the \$64,620 U.S. median. Close to one-fifth of PA travelers reported household incomes of at least \$100,000.

Executive Summary –Travelers with Children



A majority of Pennsylvania’s travelers had children under 18 years of age living at home, but the actual percentage varied greatly depending on the age of the traveler.

- Not surprisingly, travelers under the age of 55 were likely to have children under 18 years of age living at home, but especially travelers in the 35-44 age range.
- Even travelers in the older age ranges had children living with them albeit at much lower rates than younger travelers.

<u>Traveler’s Age</u>	<u>Percent With Children Under 18 Years of Age</u>
18-24	56%
25-34	60%
35-44	80%
45-54	58%
55-64	15%
65+	9%

Executive Summary – Why Vacation in Pennsylvania?



Pennsylvania's tourism industry has cultivated a very positive image and experience among travelers with a majority choosing to vacation in PA because they had traveled here before and wanted to see more.

- The primary reason marketable overnight visitors visited Pennsylvania in 2014 was because they had visited before and wanted to see more (51%).
- Recommendations from friends/relatives were responsible for an additional 16% of the state's marketable overnight visitors in 2014.
- Proximity was also a factor in deciding where to travel with an additional 16% primarily choosing Pennsylvania because they lived nearby.
- While still small, recommendations from social media sites are becoming an increasingly important factor in people's decisions of where to travel, influencing 4.1% of PA's marketable overnight travelers in 2014 – up from 1.7% in 2013.

Executive Summary – Where Do PA Travelers Come From?



Pennsylvania is largely a “drive-to” destination and, as in prior years, the majority of travelers were PA residents or from neighboring states.

- Pennsylvania residents are clearly fond of their home state, accounting for a third of the state’s Marketable Overnight segment and close to 50% of Marketable Day-Trippers.
- New York, New Jersey, Ohio, and Maryland together accounted for nearly 45% of the state’s Marketable Overnight travelers in 2014.
- Pennsylvania and these four states also accounted for almost 90% of the state’s Marketable Day-Trip travelers.
- Pennsylvania’s overnight business travelers came from a wider geographic area than the state’s leisure travelers, with Pennsylvania residents accounting for 26% of the segment’s total and Maryland, New York, New Jersey, and Ohio together accounting for an additional 31%.

Executive Summary – Where Do PA Travelers Go Once In The State?



The major urban centers of Philadelphia and Pittsburgh were the leading destinations for both overnight and day-trip travelers in 2014.

- Philadelphia and The Countryside remained PA's top destination region for total (i.e., business, leisure and VFR) overnight and day-trip travel among the state's 11 tourism regions, followed by Pittsburgh and Its Countryside, Dutch Country Roads, and the Pocono Mountains regions, together accounting for 59% of Pennsylvania's total overnight person-trips in 2014.
- The Dutch Country Roads and Philadelphia and The Countryside regions remained PA's leading destinations for marketable overnight leisure trips, followed by the Pocono Mountains and Pittsburgh and Its Countryside.
- With their large population bases and business hubs, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions once again hosted the largest number of business and VFR (visiting friends and relatives) travelers in 2014.

Executive Summary – What Do Travelers Like to Do on Their PA Trip?



Pennsylvania’s vacation travelers enjoyed a wide range of activities in 2014, but historic sites, shopping, cultural activities and attractions, and scenic drives were among the most popular.

- Almost 40% of Pennsylvania’s marketable overnight travelers visited a historic site or landmark, while a third went shopping (including outlet and “unique” shopping), 30% enjoyed a cultural activity or attraction, and 15% took a scenic drive.
- There were clear differences in the types of activities depending on the presence or absence of children on the trip. Marketable overnight and day-trip travelers without children along were far more likely to enjoy fine dining experiences, visit a casino, or go to a bar or club than those traveling with children, who were far more likely to visit an amusement park or zoo, or swim, fish, and/or camp.

Executive Summary – When and How Travelers Plan and Book Their PA Trip



The trip planning cycle for today's time-pressed consumers continues to be short and the internet remains the top planning tool.

- Forty percent of Pennsylvania's marketable overnight travelers planned their PA trip within a month or less of traveling and an additional 22% one to two months before.
- Almost 50% of PA's marketable overnight travelers used the internet to plan their 2014 PA trip, while 16% relied on their personal experience and 12% received advice from friends/relatives.
- Planning where to stay was by far the most common reason PA's marketable overnight travelers used the internet in 2014 with 46% using the internet to research lodging options. A third of travelers used the internet to find out about local activities/attractions, 31% for maps/directions, and 25% for info on restaurants.
- In terms of technology, PA's marketable overnight travelers were far more likely to use a desktop (46%) or laptop (48%) in planning their 2014 PA trip, but turned to their smartphone (60%) and, to a lesser extent, tablet (26%) while on their trip.

Executive Summary – Travelers and Social Media Use



Travelers are highly engaged in social media but with clear differences based on age, i.e., younger travelers tend to post their travel experiences while older travelers seek travel advice and read reviews.

- Nearly 80% of PA's marketable overnight leisure travelers used social media in some capacity in 2014 – essentially mirroring the nationwide average.
- As in prior years, travelers in the younger age groups were far more likely to use social media before, during, and after their trips than older travelers, i.e., 86% of travelers below 35 years of age vs. 59% of those aged 65 or older. It is important to note that there has been a sharp increase in the proportion of travelers in the older age group using social media with their usage nearly doubling since 2012.
- PA's younger marketable overnight leisure travelers (i.e., below the age of 45) most commonly turned to social media to post their travel photos and/or videos online in 2014, while older travelers – including those in the 65+ age group – were far more likely to use social media to read online travel reviews.

Executive Summary – Main Trip Features



Short getaways at hotels/motels with family or close friends were some of the most common features of trips taken by Pennsylvania’s marketable overnight travelers in 2014.

- Pennsylvania continued to be a “drive-to” destination in 2014 with the vast majority of the state’s out-of-state visitors arriving by car, van, truck, or RV.
- Short stays continued to be the norm of PA’s marketable overnight travelers in 2014 with 64% spending just one or two nights on their PA trip – a far higher percentage than the 53% US average.
- A majority of these travelers chose to stay in hotels or motels (51%), although 20% stayed at their second home or in housing owned by friends or relatives – a 7 percentage point increase from 2013.
- A majority of PA’s marketable overnight leisure visitors traveled with a spouse/partner (60%) in 2014 and 31% traveled with children – down from 35% in 2013.

Executive Summary – What Travelers Look For in a Vacation Destination



Travelers have certain priorities and expectations when deciding where to go on vacation or weekend getaway. U.S. overnight travelers listed “exciting, adult atmosphere, worry free, family friendly, and with sightseeing opportunities” as their five top priorities in 2014 .

- Pennsylvania scored well on each of the top five priorities, with half to two-thirds of marketable overnight travelers agreeing that their 2014 Pennsylvania trip experience largely met each of these top priorities.
- Travelers also perceive Pennsylvania as a safe and very affordable destination with lots to see and do and good for both an adult vacation or weekend getaway and as a place for families to visit.
- In addition to a list of travel priorities, there are certain images that come to mind about a destination. Pennsylvania’s image is as a safe, affordable, and easy place to travel to, a good place for an adult vacation/getaway but also family friendly, and very scenic, with PA residents largely rating the state more favorably than non-resident travelers who visited the state.

Executive Summary – Main Benefits from PA Leisure Trip



Research has shown that taking a leisure trip purely for fun offers a number of benefits to individuals' overall health and well-being.

- As in prior years, PA's marketable overnight and day-trip leisure travelers believed relaxation/stress relief to be the primary benefit of travel in 2014. This was cited by nearly two-thirds of overnight travelers and 56% of day-trippers, with "a break from day-to-day responsibilities" ranking second.
- Creating lasting memories and improving and enriching personal relationships with family and/or friends were also key benefits, as well as having no fixed schedule.
- visiting places never seen before, arriving home with great stories, and being either physically or intellectually challenged were of somewhat lesser importance for the state's marketable overnight and day-trip travelers in 2014.

Detailed Findings

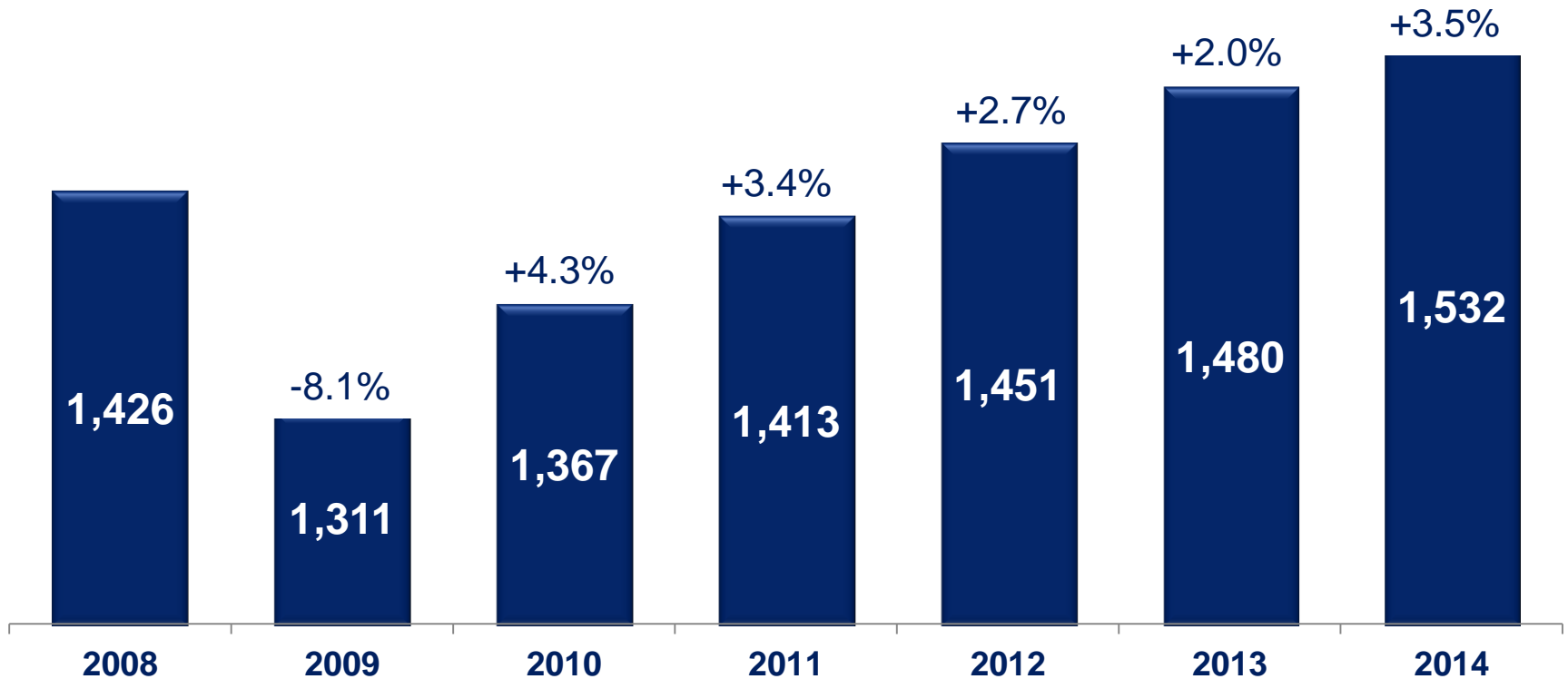
Size & Structure of US Overnight Travel Market

U.S. Overnight Visitor Volume 2008 to 2014



Base: Total Overnight Trips

In millions of trips



Size and Structure of the U.S. Domestic Overnight Travel Market



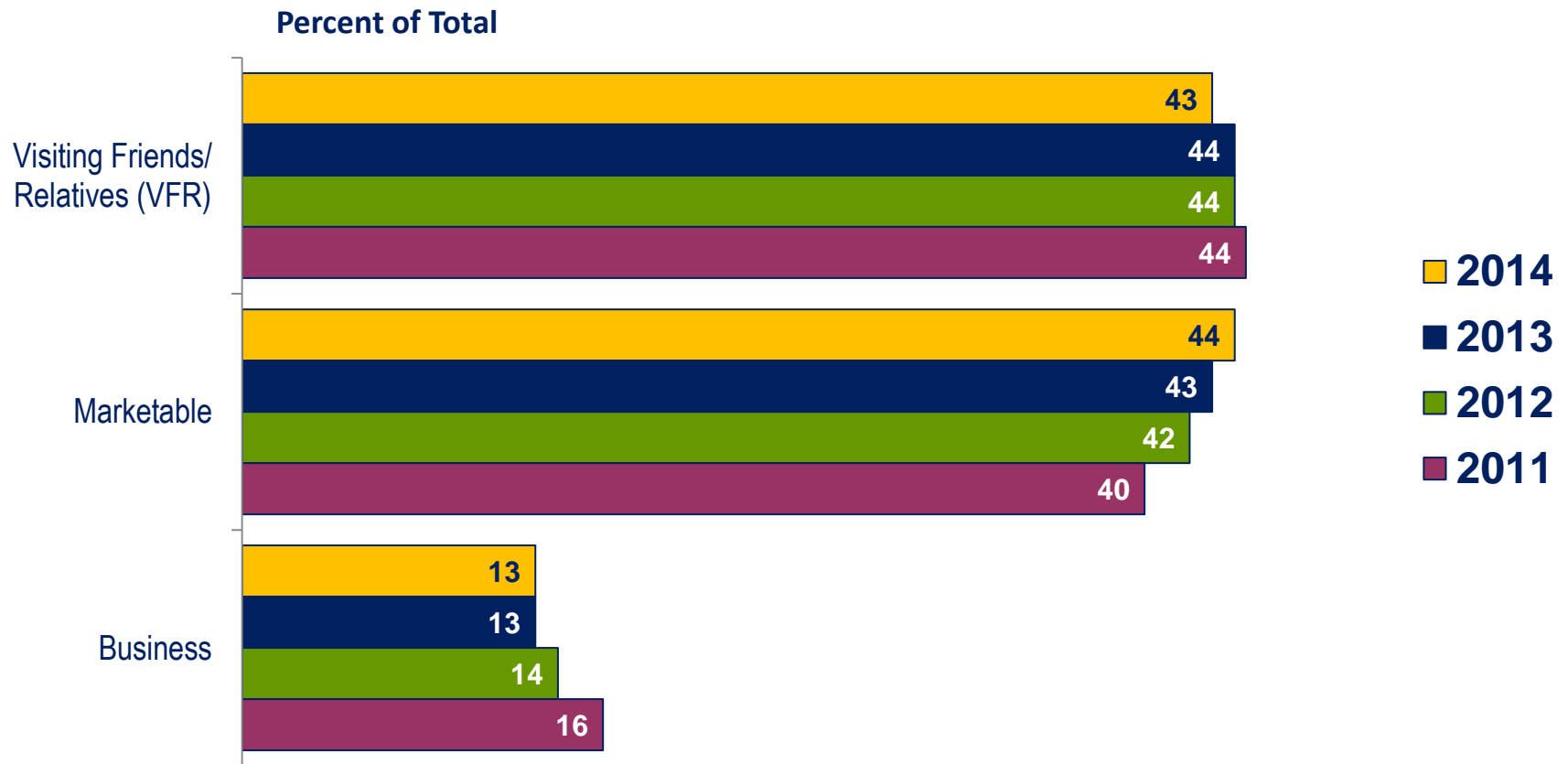
U.S. overnight visitor volume continued to show a steady increase in 2014, reaching a record high 1.53 billion travelers.

- Overnight travel by U.S. residents rose 3.5% to 1.53 billion in 2014.
- Of the more than 1.5 billion overnight trips taken by U.S. travelers in 2014, 87% were for leisure purposes – either to visit friends and/or relatives (VFR) or for purely vacation/getaway weekend trips (i.e., “marketable”) that may be influenced by marketing.
- An additional 10% were for strictly business purposes; and approximately 3% were business-leisure trips.
- The top six marketable overnight trip types were touring trips, special event travel, outdoor trips, city trips, casino trips, and resort trips.

Structure of the U.S. Overnight Travel Market — Trends



Base: Overnight Trips

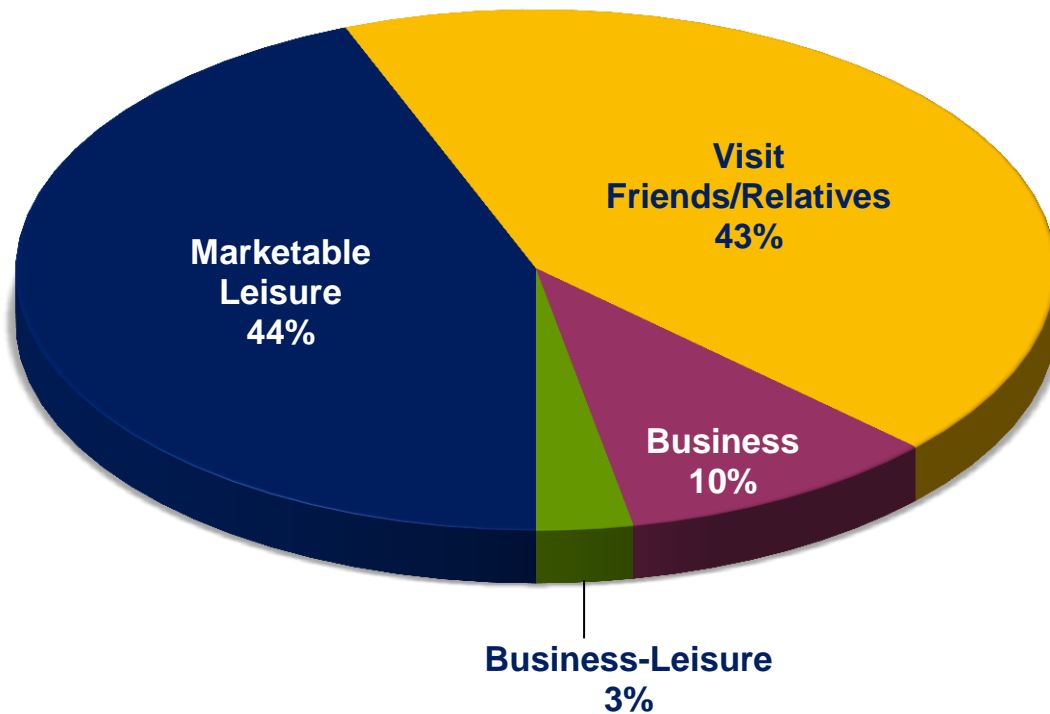


Business = Business + Business-Leisure trips in this slide

U.S. Overnight Market Segments



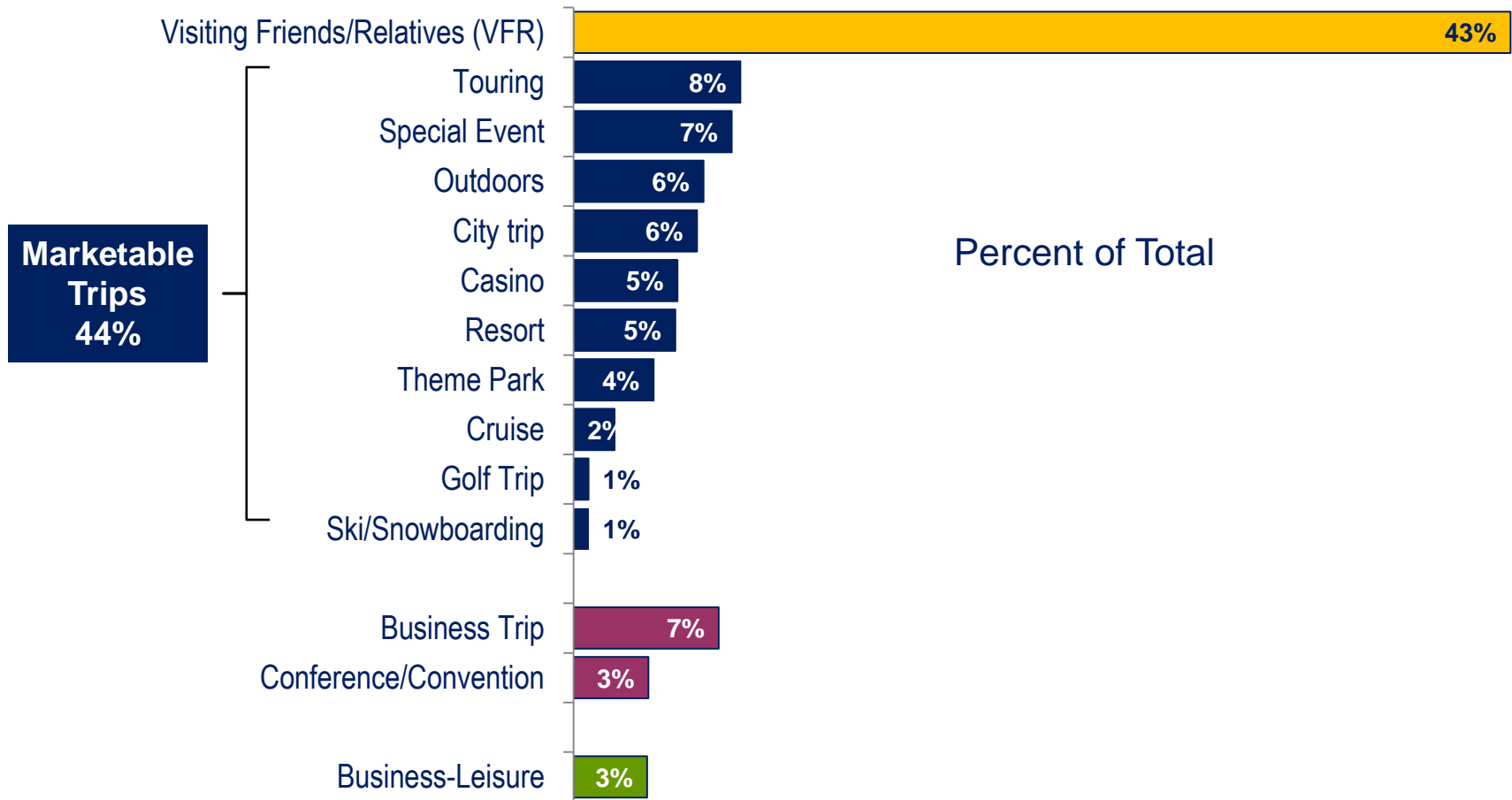
Base: Adult Overnight Trips



Main Purpose of U.S. Overnight Trips in 2014



Base: Adult Overnight Trips



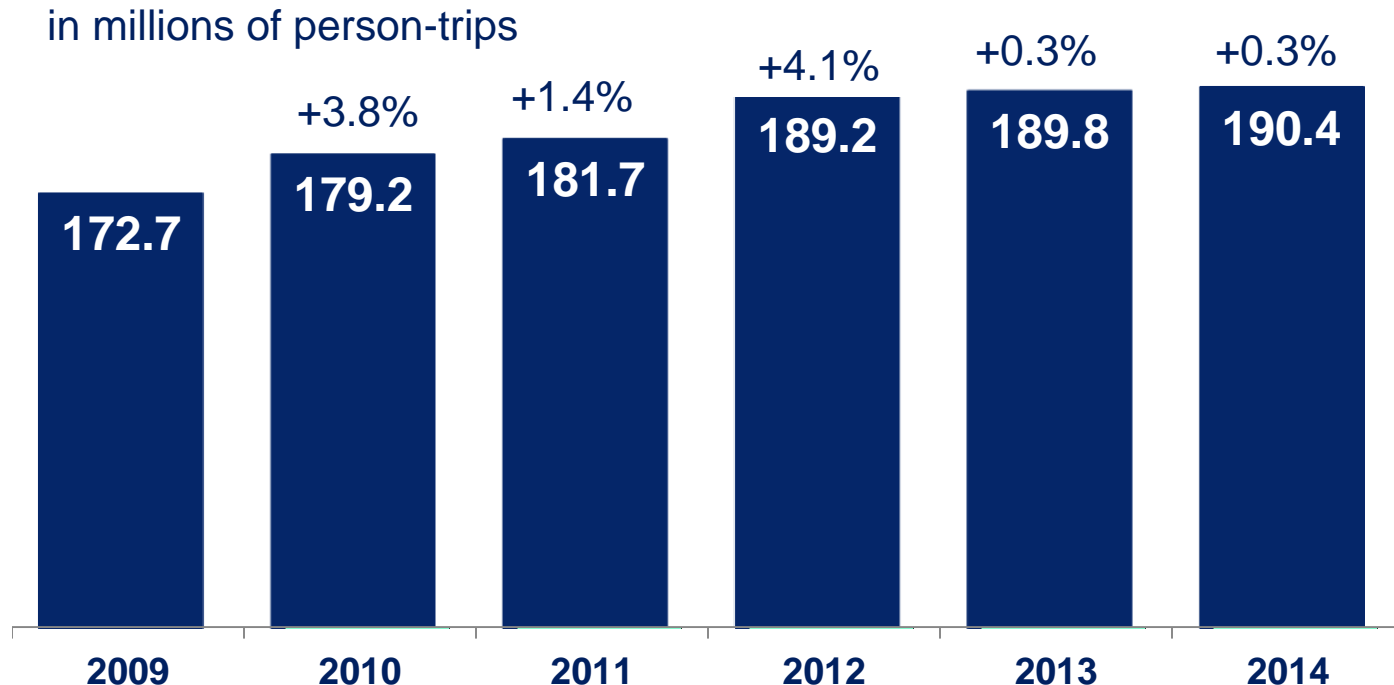
Size & Structure of Pennsylvania Travel Market

Pennsylvania Total Visitor Volume 2009 to 2014



Base: Total Overnight + Day-Trips

Pennsylvania hosted a record number of travelers in 2014, but the rate of growth remained low, especially compared to the U.S. average.

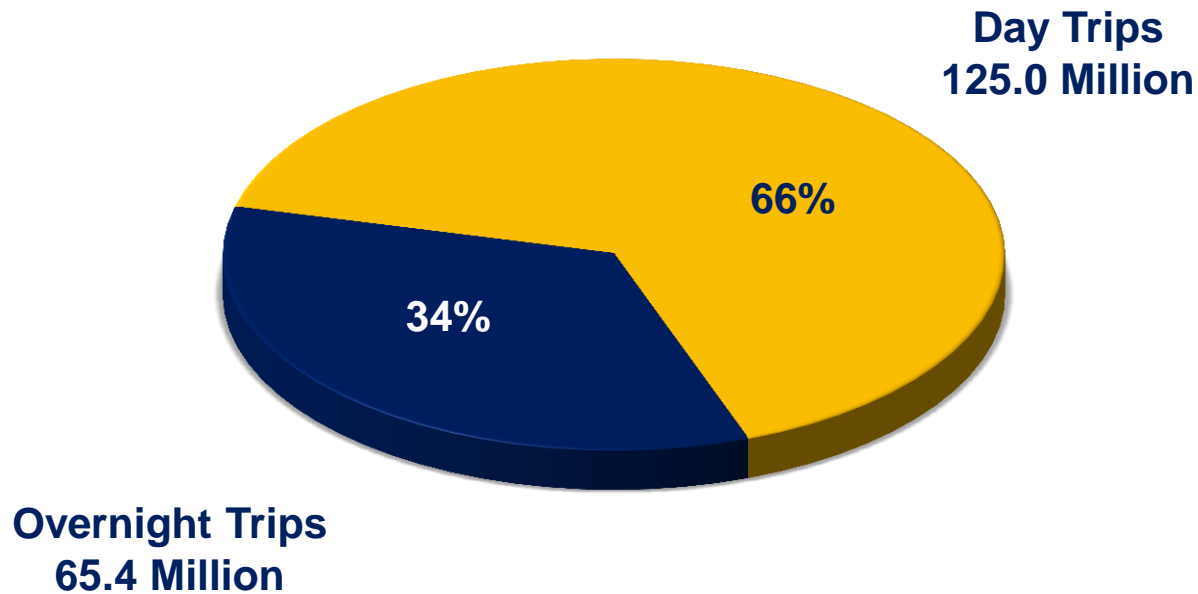


PA 2014 Overnight & Day-Trip Visitor Volume



Base: Adult Overnight Trips to Pennsylvania

Total Person-Trips = 190.4 Million



Pennsylvania Visitor Volume



- Pennsylvania hosted an estimated 190.4 million travelers in total (as measured in person-trips) from throughout the U.S. in 2014.

Of these, 65.4 million (or 34%) were overnight trips.

- Of the estimated 65.4 million overnight trips, close to 39% could be considered marketable trips – down slightly from the prior two years and five percentage points below the U.S. average.

Marketable trip types are trips that can be influenced by marketing, i.e., leisure trips excluding visits to friends/relatives (VFR).

- Special events, touring, and outdoors were the top three marketable trip types for Pennsylvania overnight travelers in 2014.
- Visiting friends/relatives (VFR) accounted for 49% of PA's overnight travel in 2014, up slightly from 2013 and well above the 43% U.S. average.

Pennsylvania 2014 Visitor Volume Day-Trips

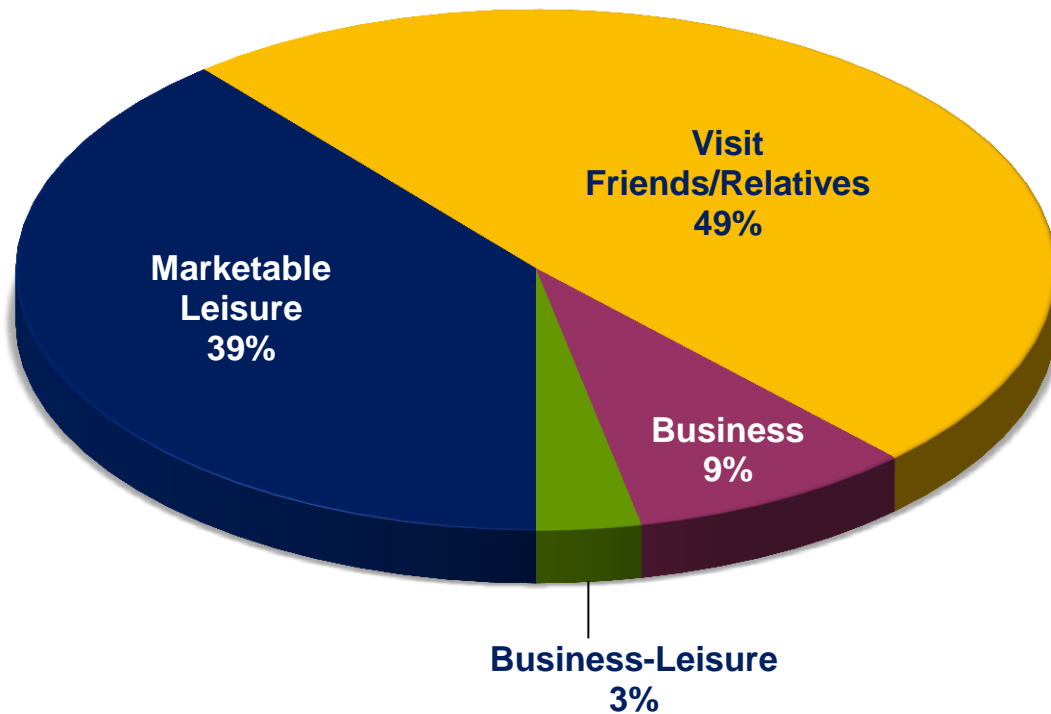


- Pennsylvania hosted an estimated 125 million day-trip travelers to and within Pennsylvania in 2014.
- Of these, 55% were marketable trip types (a much higher percentage than the overnight segment).
- Key marketable day-trip types included touring, special events, and shopping.

Pennsylvania's Overnight Trip Market Segments



Base: Adult Overnight Trips to Pennsylvania

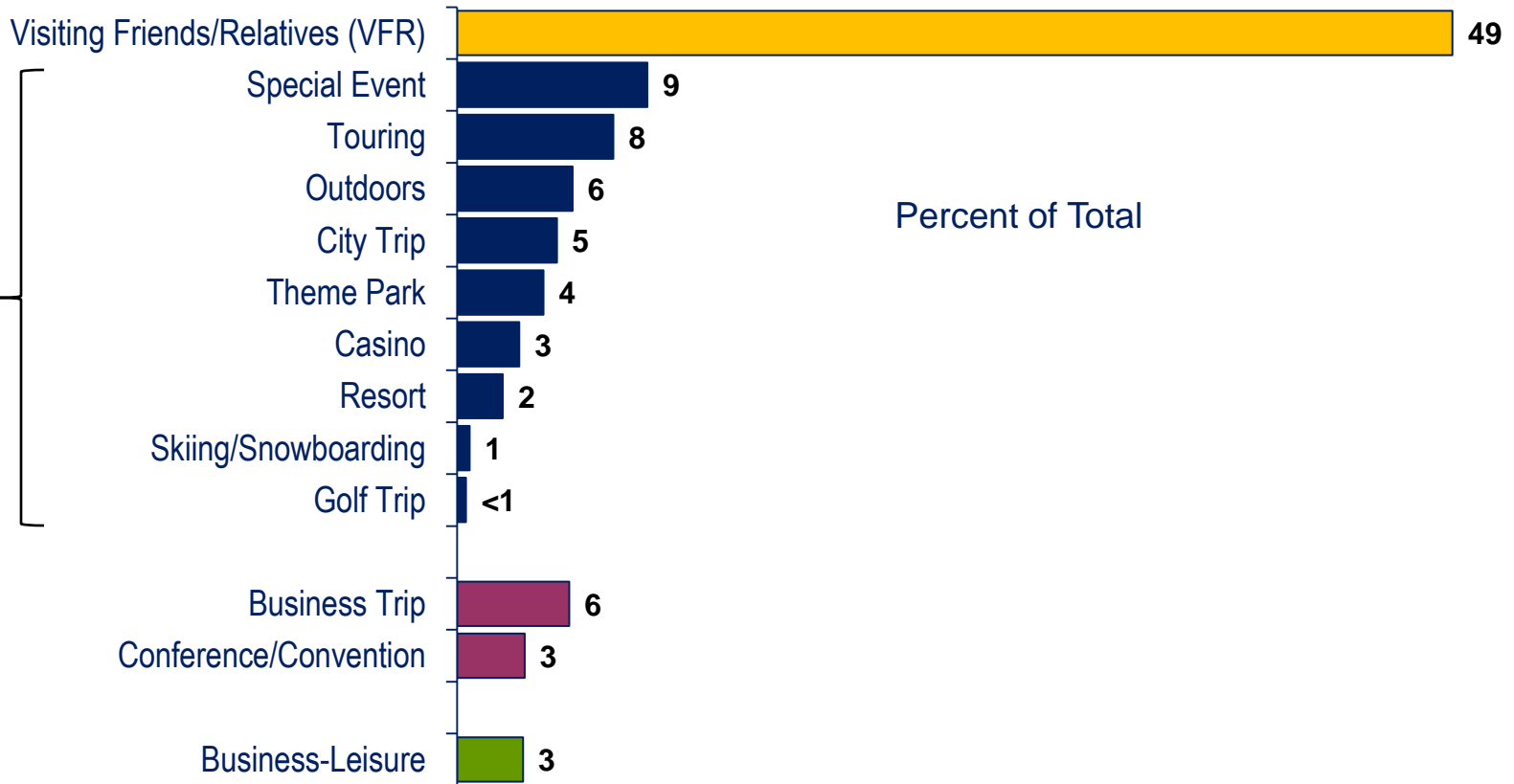


Main Purpose of Stay 2014 Pennsylvania Overnight Trips



Base: Adult Overnight Trips

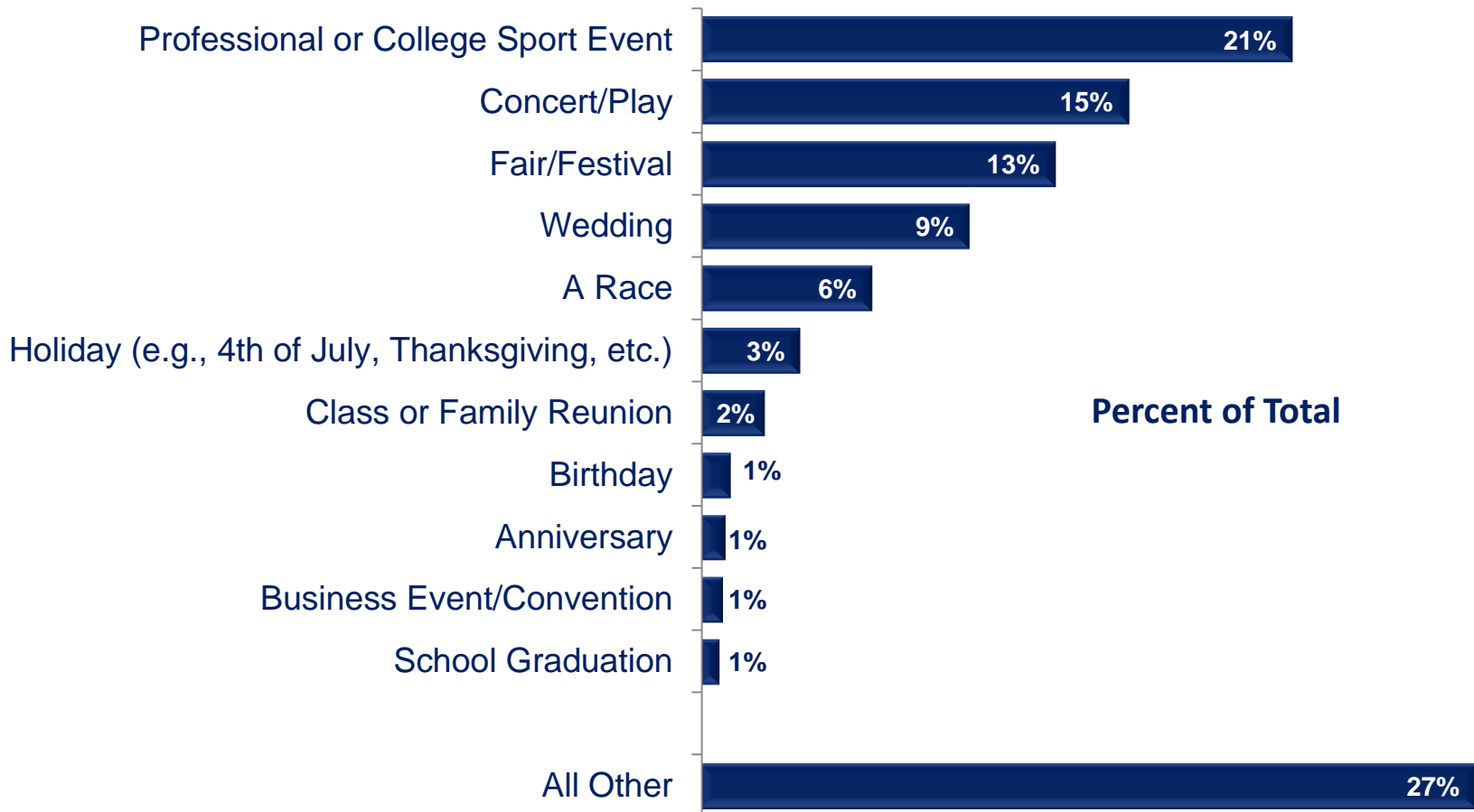
**Marketable
Trips
39%**



Pennsylvania Overnight Travel Special Event Trip Types



Base: Adult Overnight Trips to Pennsylvania

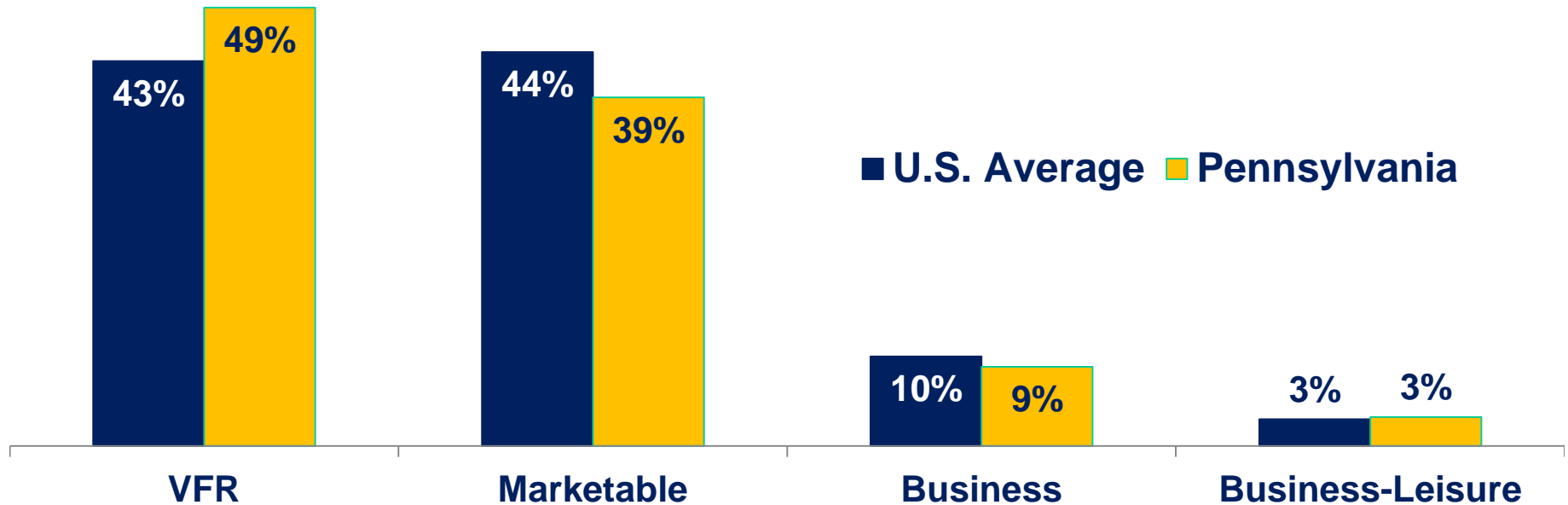


Comparison of Pennsylvania and U.S. Overnight Market Segments, 2014



Travelers were more likely to travel to and within Pennsylvania to visit friends and family than travelers nationwide.

2014 Overnight Travel, Main Purpose of Stay
Pennsylvania vs. U.S. Average, Percent of Total Travelers

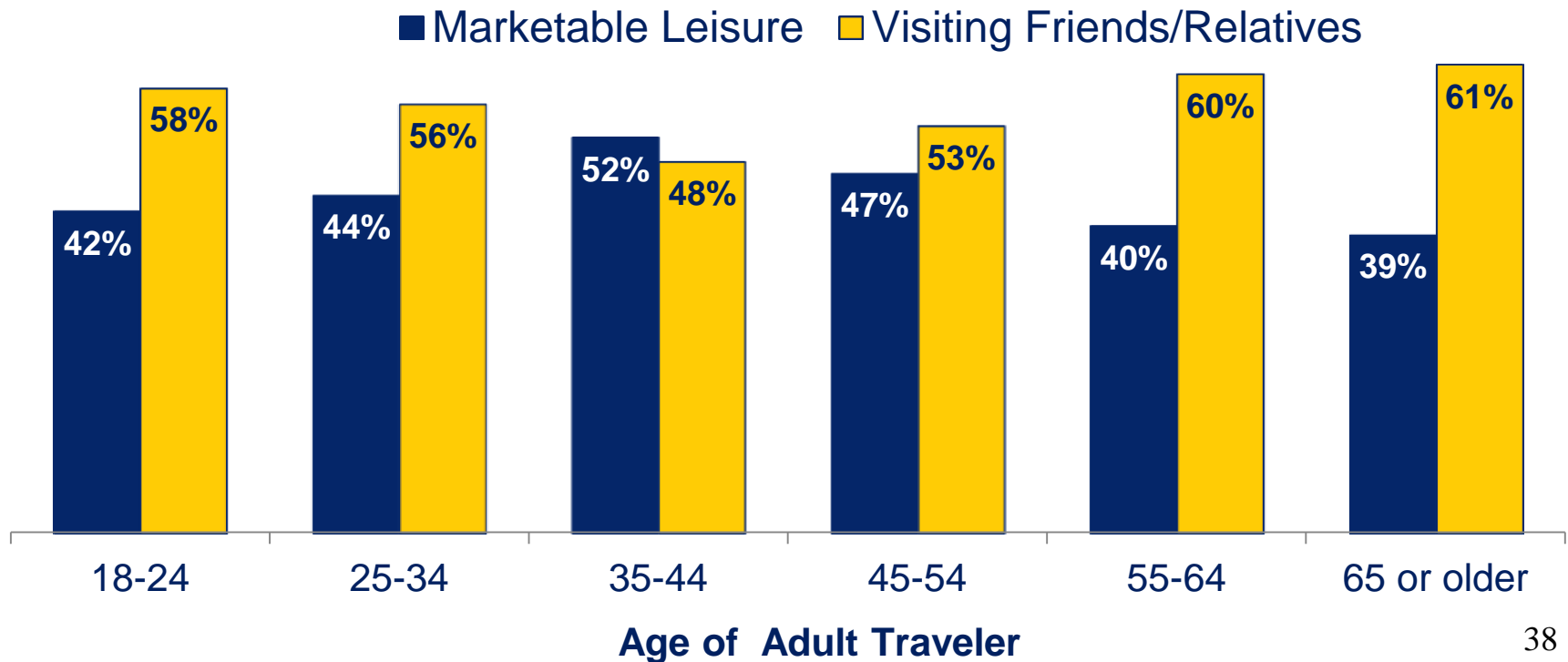


Pennsylvania Overnight Leisure Market Segments by Age of Adult Traveler



Base: Adult Overnight Trips to Pennsylvania

Travel to visit friends/relatives (VFR) was the primary reason for PA overnight travel in 2014 for every age group except those in the 35-44 age range. This group was far more likely to visit Pennsylvania for purely leisure/vacation purposes than any other age group.



PA & U.S. Marketable Overnight Leisure Segments by Age of Adult Traveler



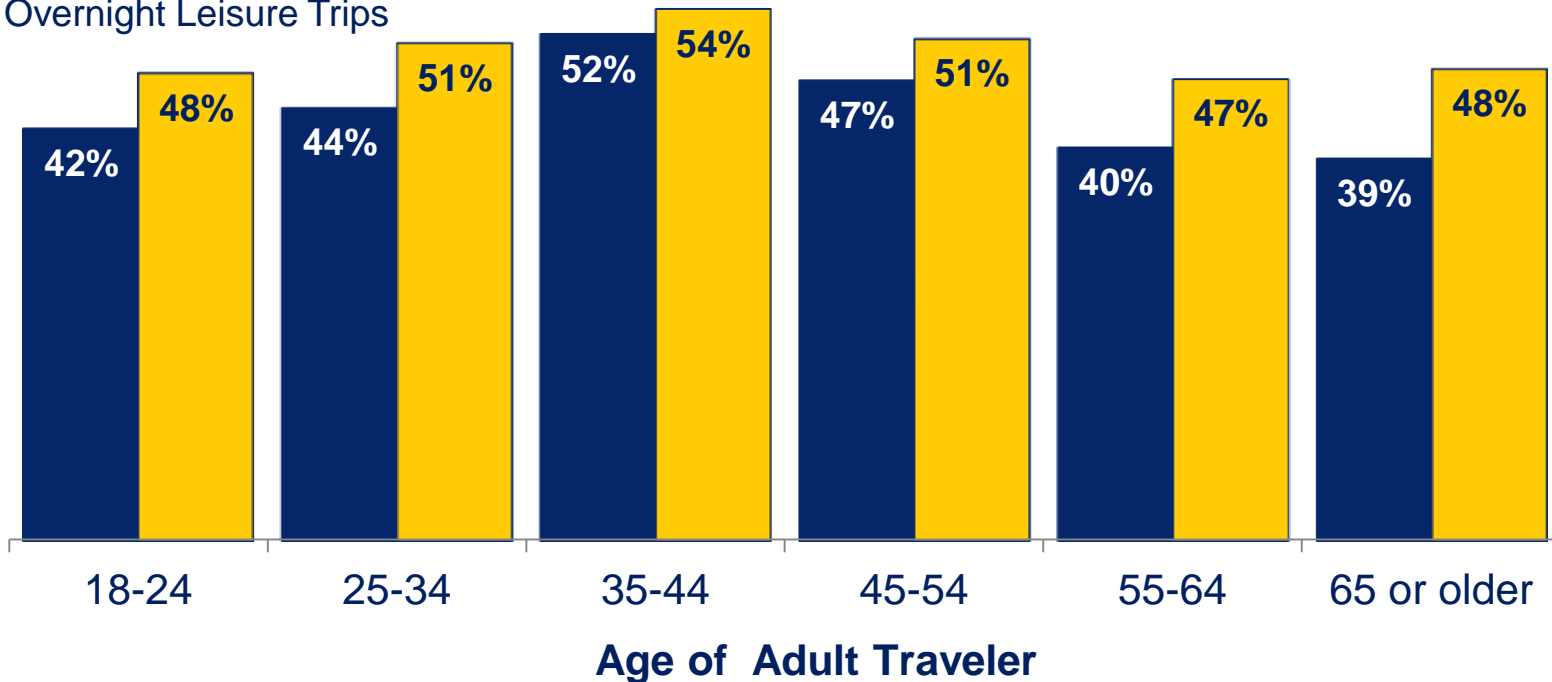
Base: Adult Overnight Trips to Pennsylvania

Travelers were less likely to visit Pennsylvania for purely leisure (marketable) purposes compared to the U.S. average in 2014, regardless of age.

Marketable Trips as Percent of Total Overnight Leisure Trips

■ Pennsylvania

■ United States

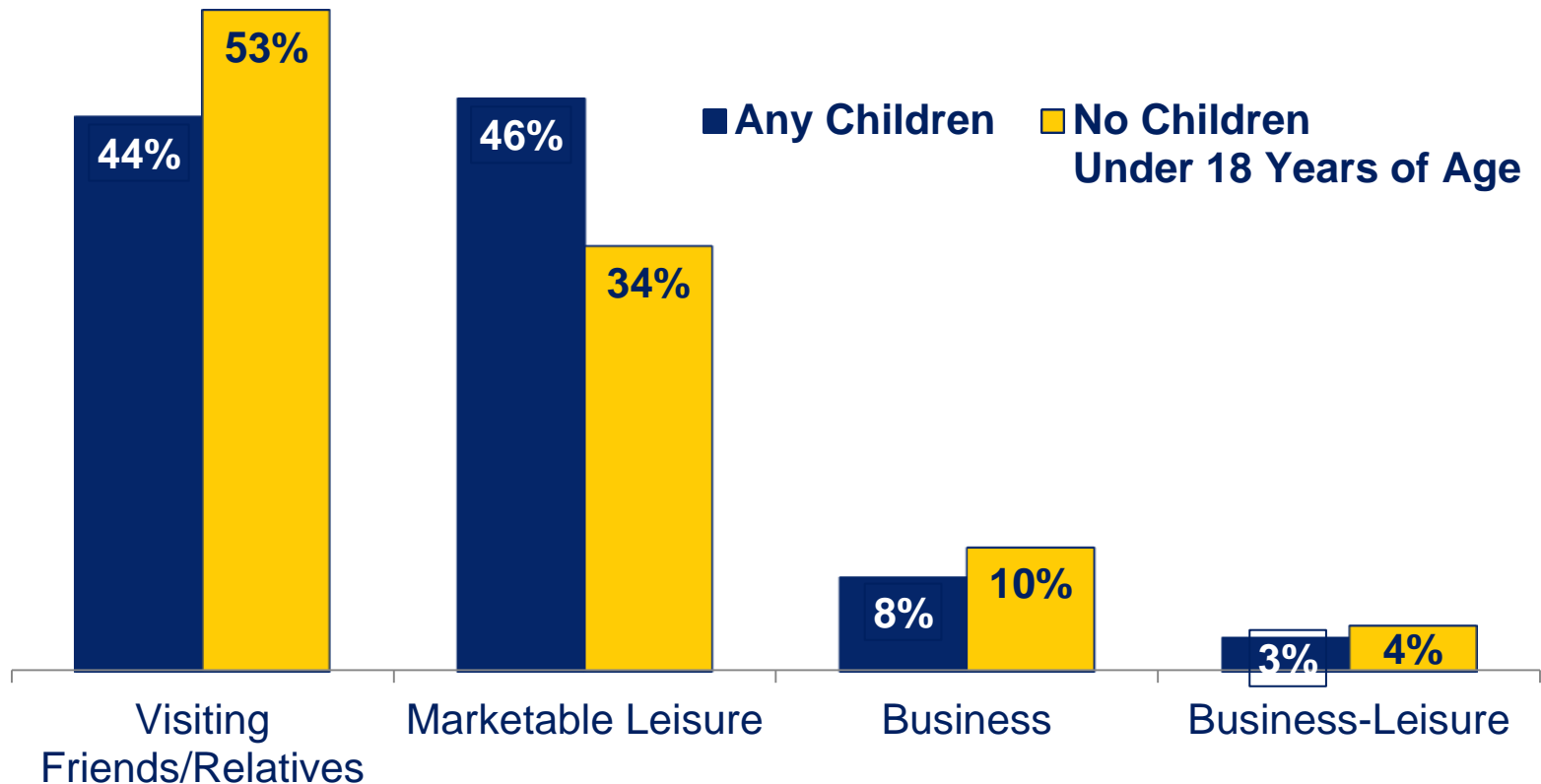


Pennsylvania's Overnight Market Segments by Presence of Children in Household



Base: Adult Overnight Trips to Pennsylvania

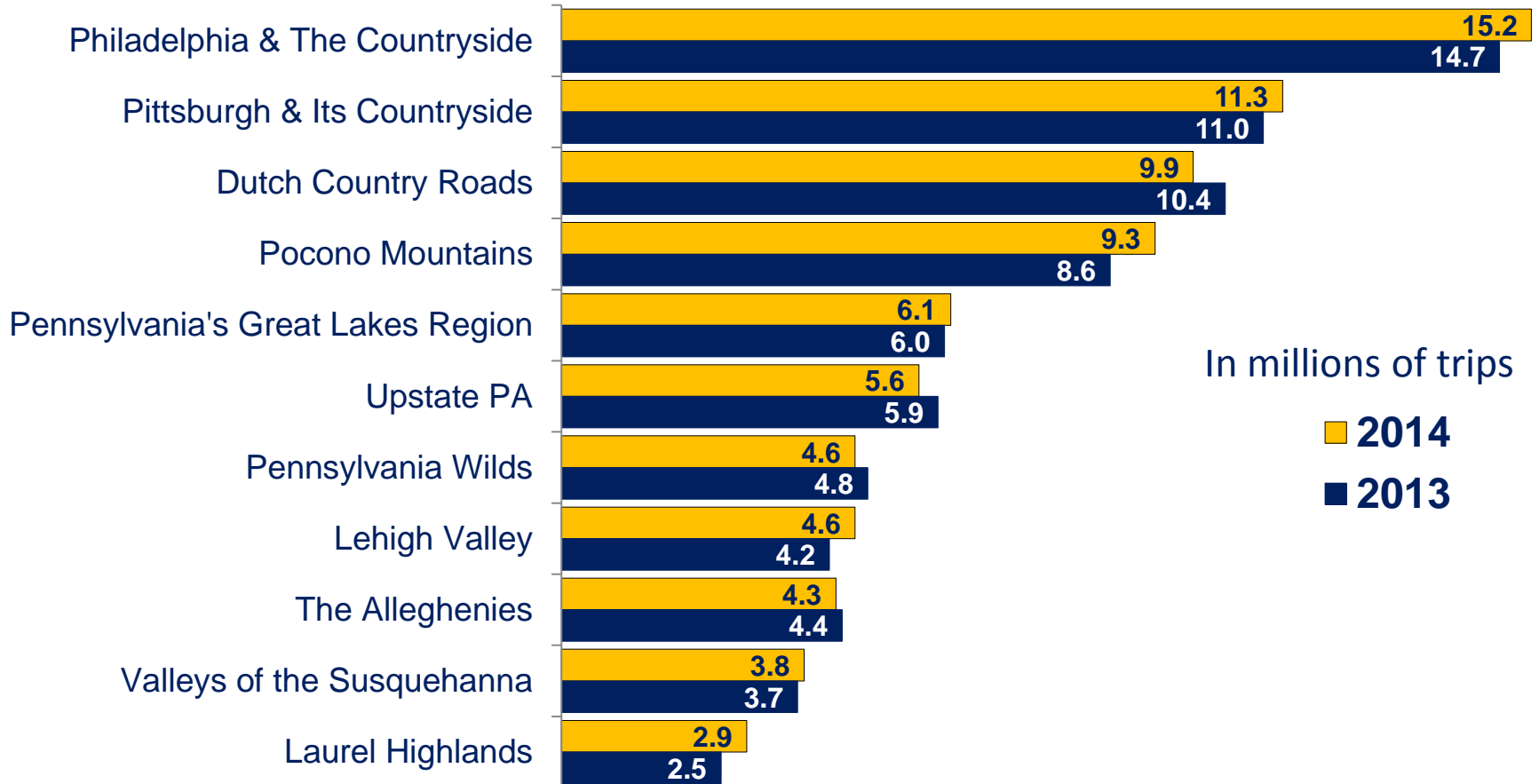
Travelers with children living at home were far more likely to take a PA overnight trip for purely leisure (marketable) purposes than those without children.



2014 Estimated Visitor Volume Pennsylvania Overnight Trips By Region*



Base: Adult Overnight Trips to Pennsylvania



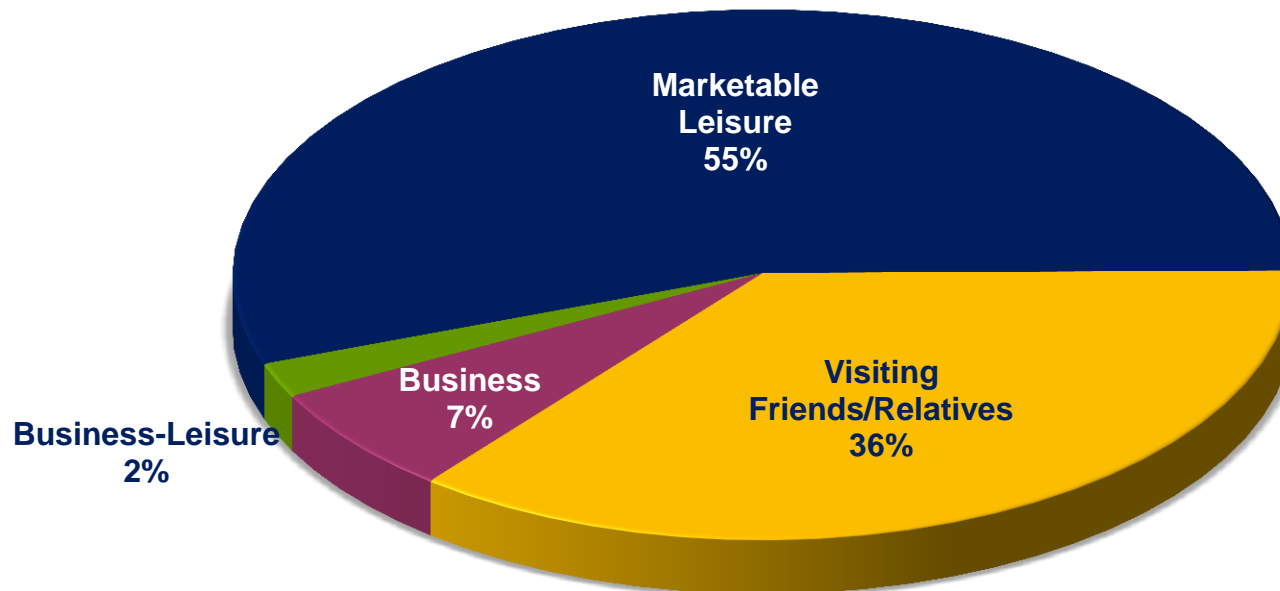
*Spent time in region

Note: Total will add to more than State total as a number of travelers visited more than one region on a single trip.

2014 Pennsylvania Day-Trip Market Segments



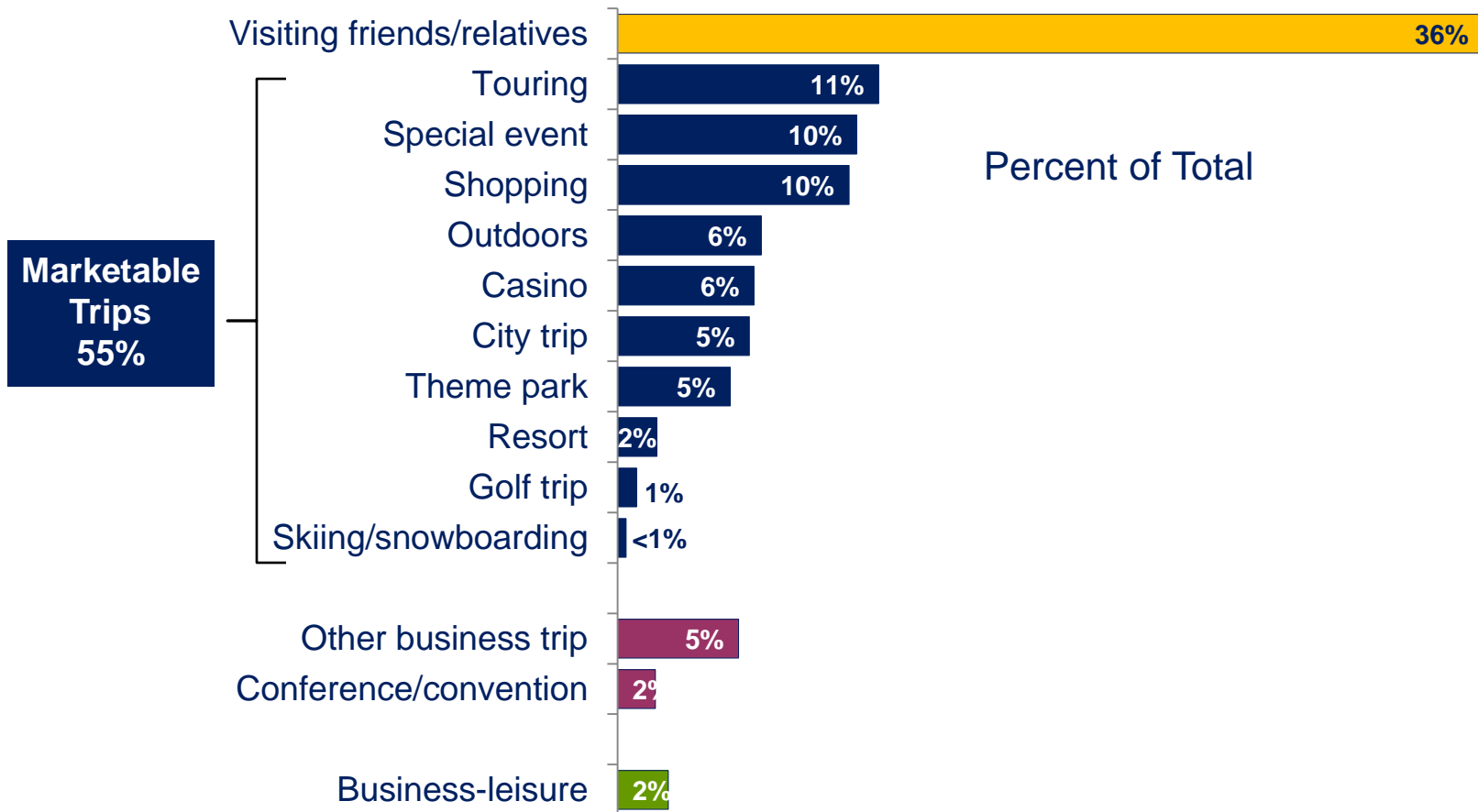
Base: Adult Day Trips to Pennsylvania



Main Purpose of Stay 2014 Pennsylvania Day Trips



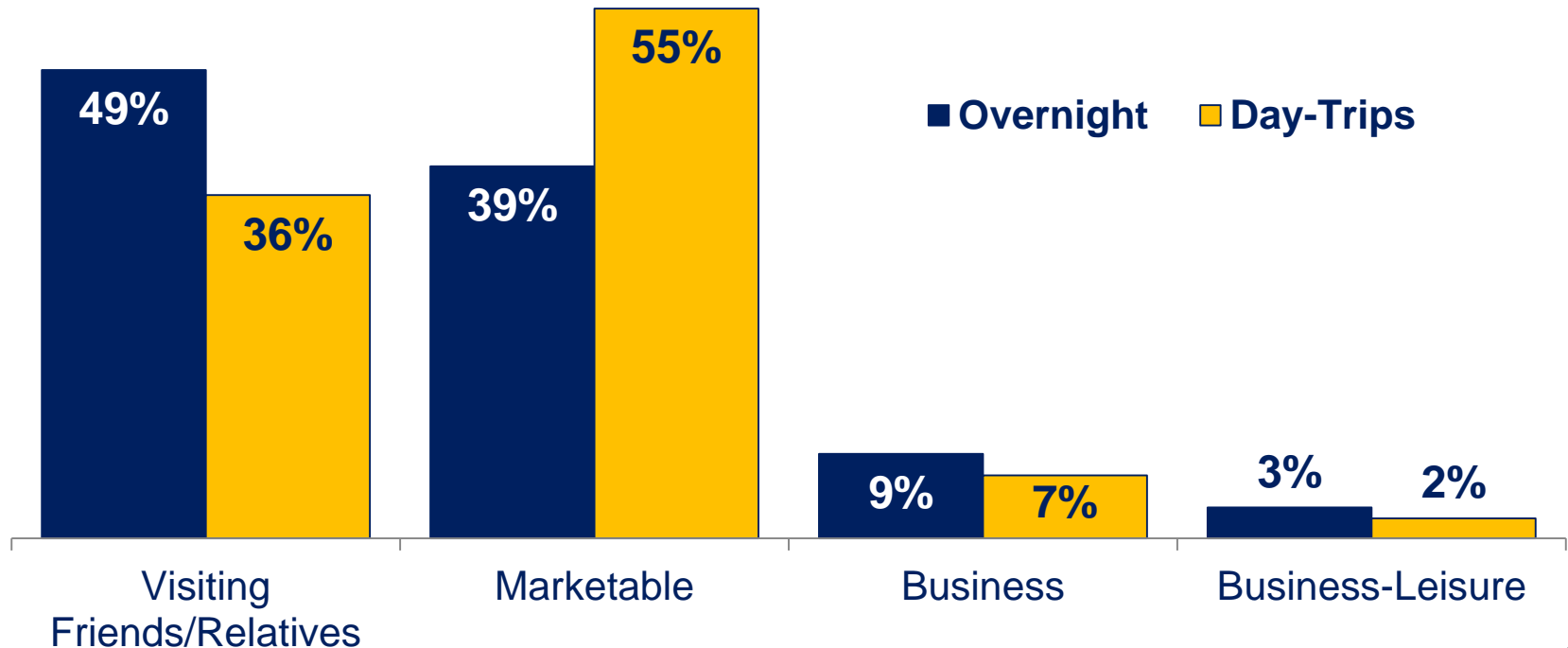
Base: Adult Day Trips



Pennsylvania 2014 Purpose of Stay Comparison between Overnight and Day-trip



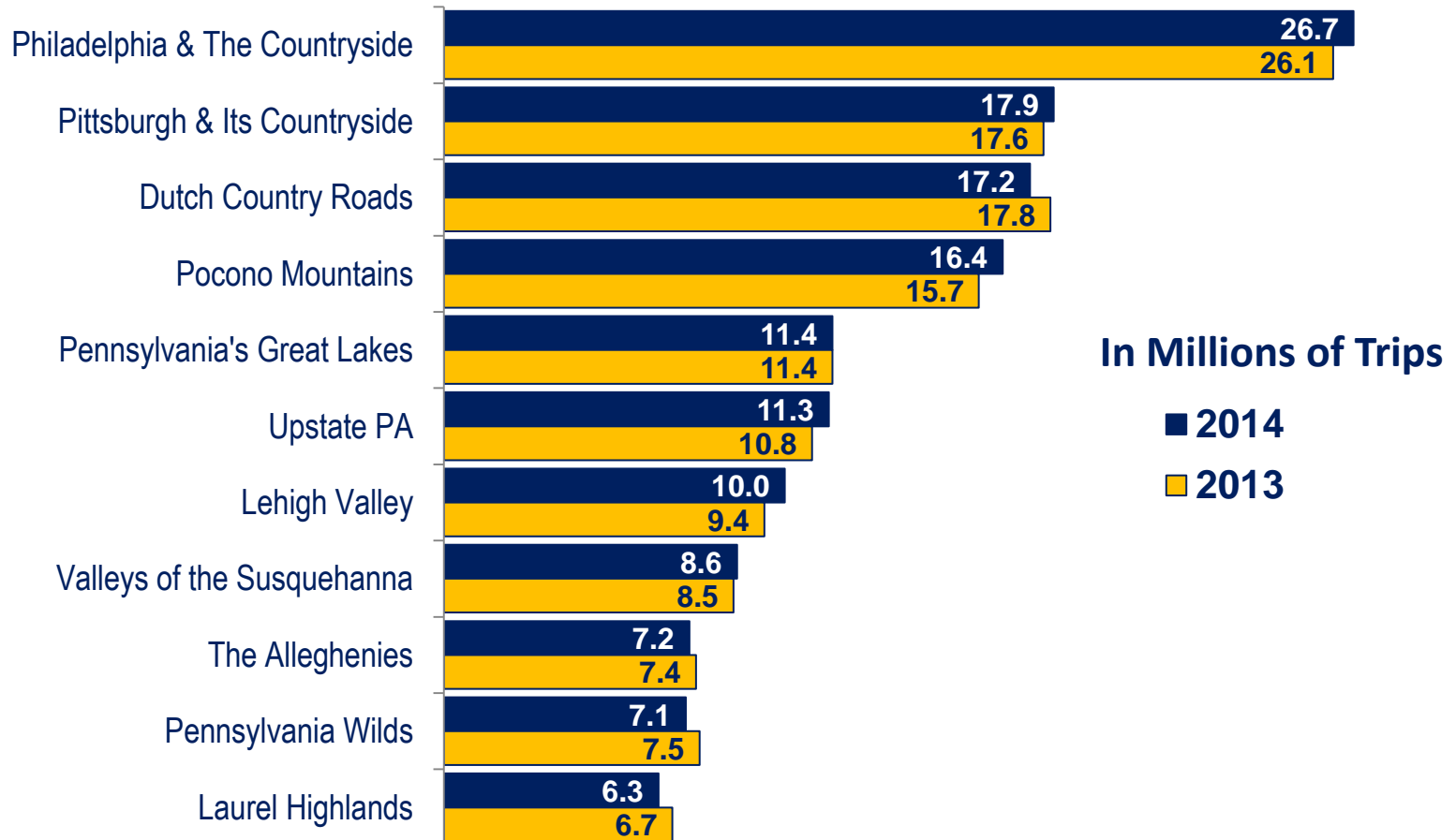
The graph below illustrates the differences in the purpose of stay between PA's overnight and day-trip travelers in 2014. As in prior years, overnight travelers were more likely to travel to and/or within PA to visit friends/family, while day-trip travelers were far more likely to visit the state for purely leisure reasons.



Estimated Visitor Volume Pennsylvania Day-Trips by Region*



Base: Adult Day Trips



*Spent time in region

Total will add to more than State total as some tourists visit more than one region on a single trip.

Pennsylvania

2014 Marketable Overnight Trips

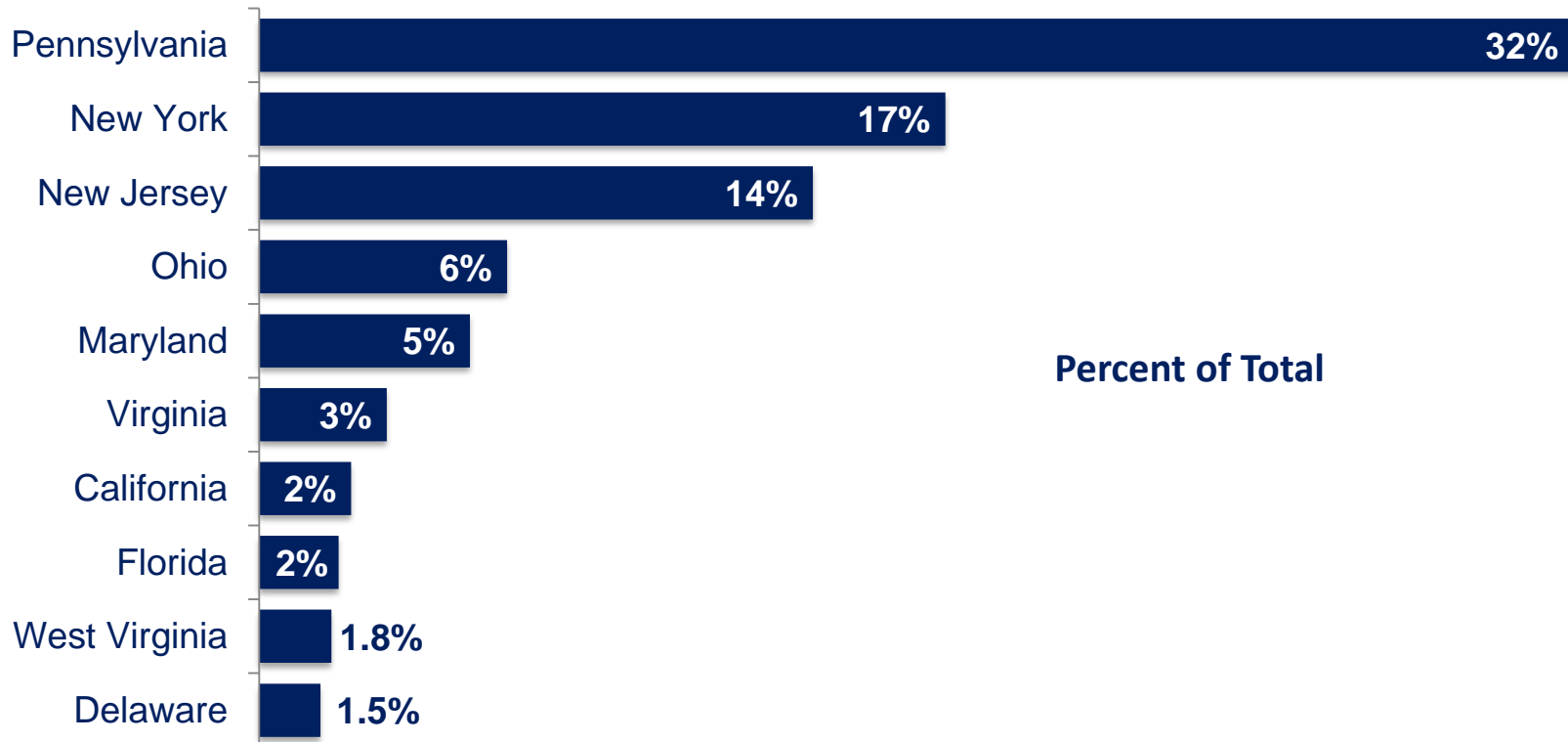
Origin Markets for Pennsylvania Overnight Trips

Main Origin States for Pennsylvania's Marketable Overnight Travelers



Base: Marketable Overnight Trips

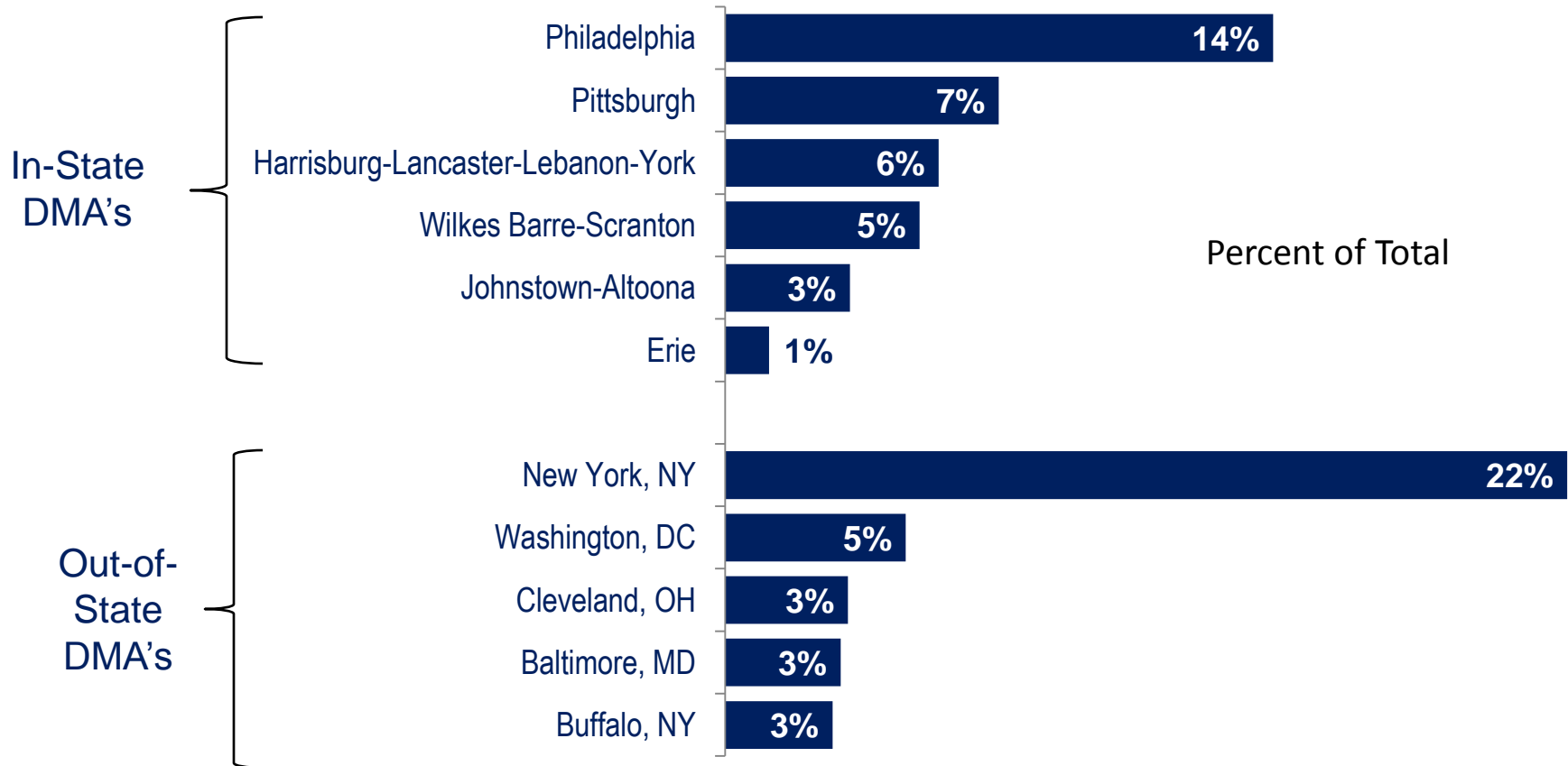
Pennsylvania residents accounted for nearly a third of the state's Marketable Overnight travel segment, while New York, New Jersey, Ohio, and Maryland together accounted for an additional 45% of PA travelers in 2014.



Main Urban Origin Markets for Pennsylvania's 2014 Marketable Overnight Travelers



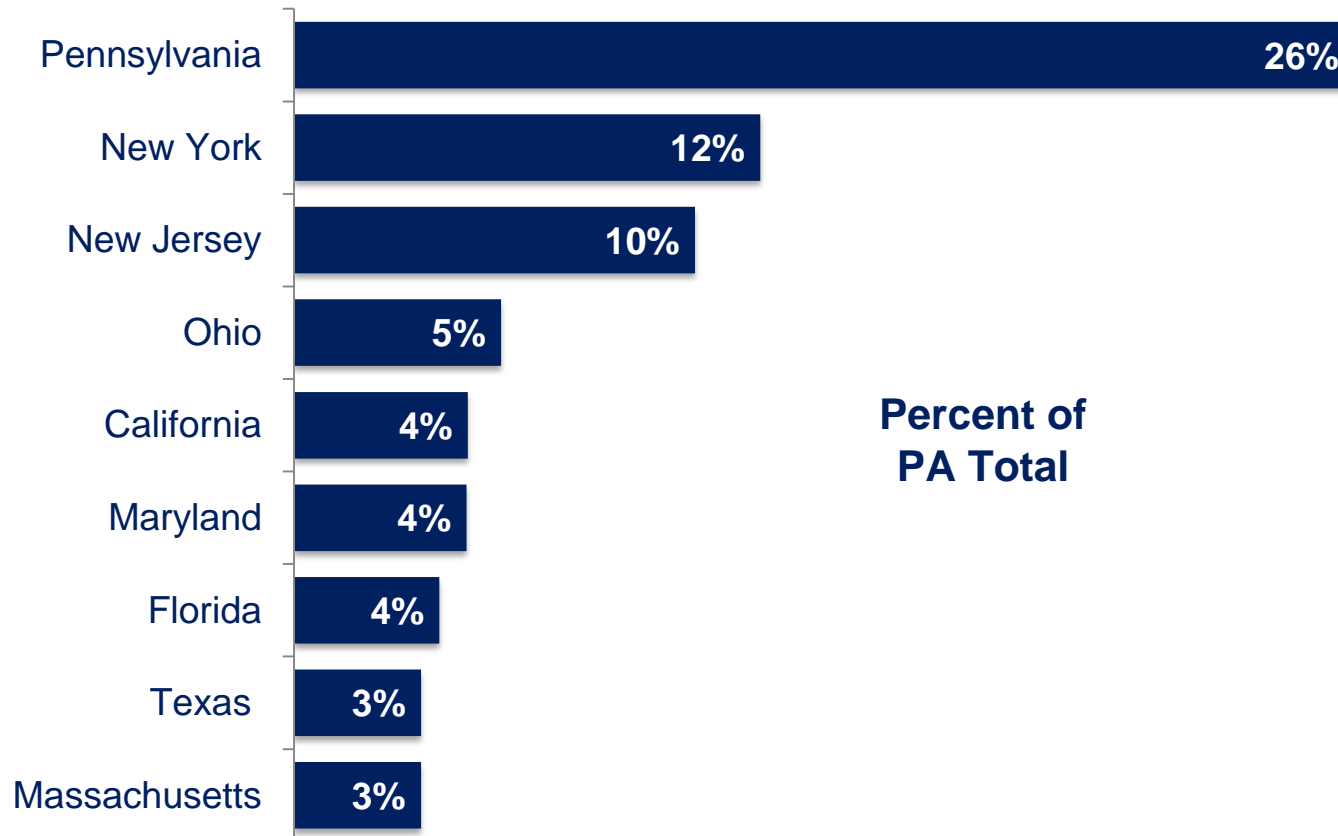
Base: Marketable Overnight Trips



Main Origin States for Pennsylvania's 2014 Business Overnight Travelers



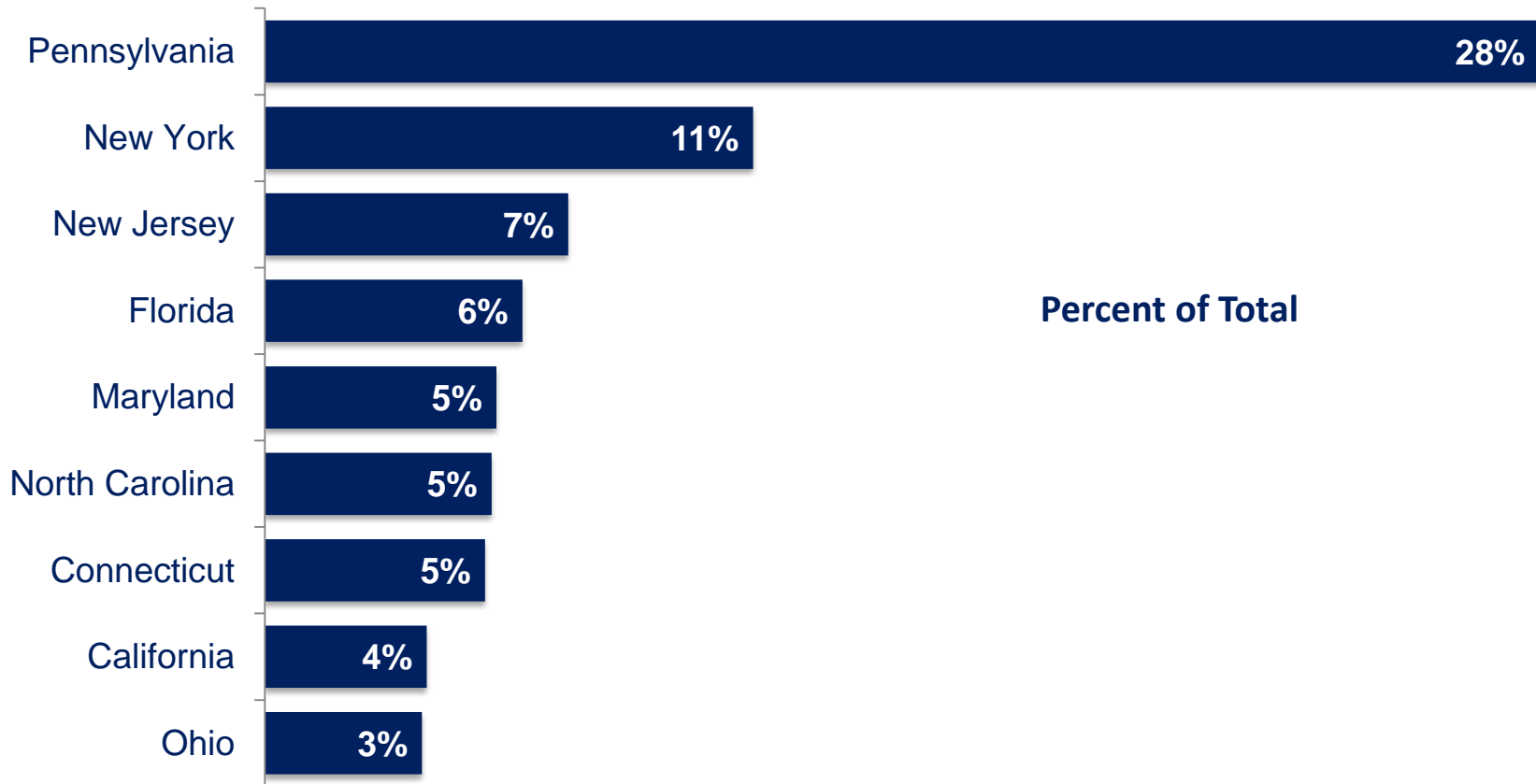
Base: Business Overnight Trips



Main Origin States for Pennsylvania's 2014 Business-Leisure Overnight Trips



Base: Business-Leisure Overnight Trips



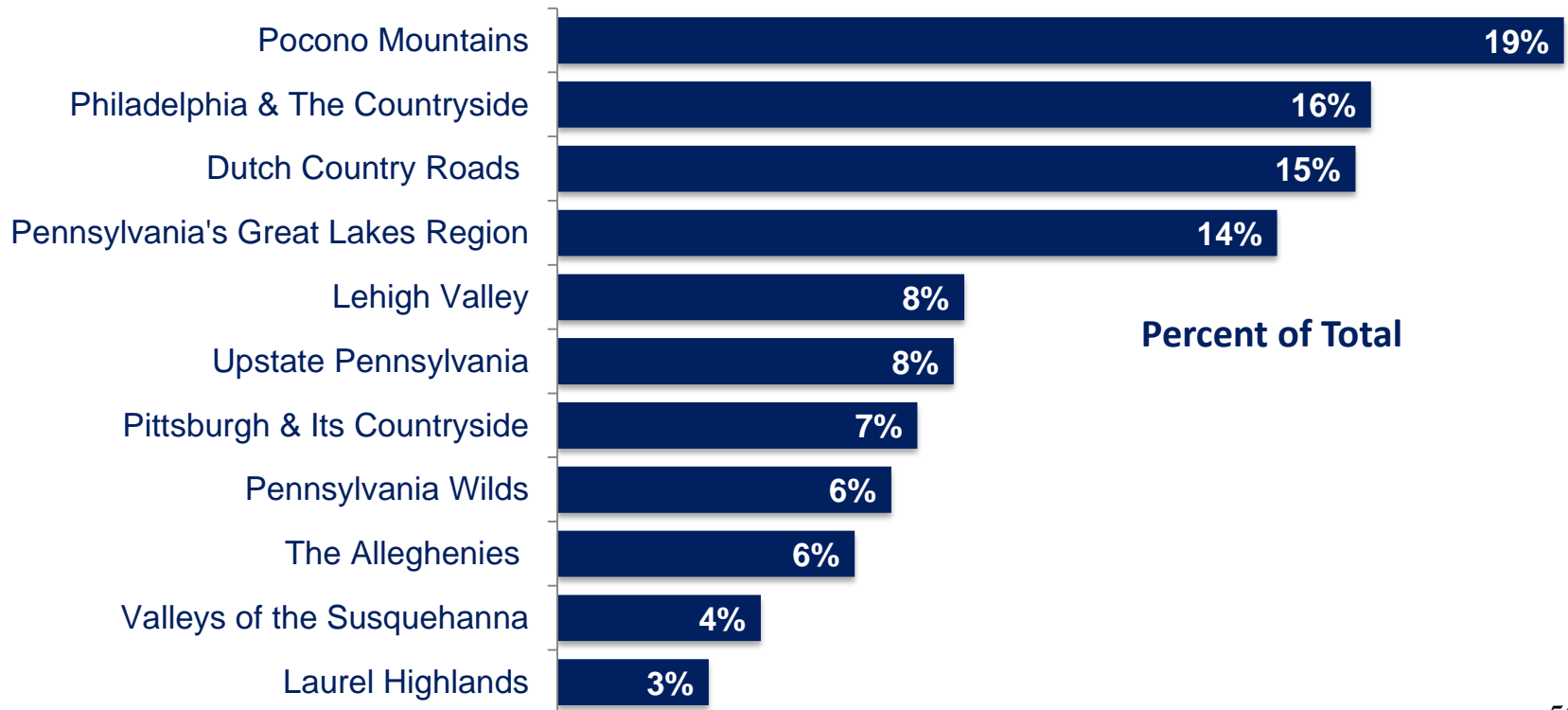
Pennsylvania Tourism Regions Visited by Travelers' State of Residence

Pennsylvania Tourism Regions Visited by New York Residents



Base: Marketable Overnight Trips

For marketable overnight travelers from New York state, the Pocono Mountains region was once again the most popular PA destination in 2014.

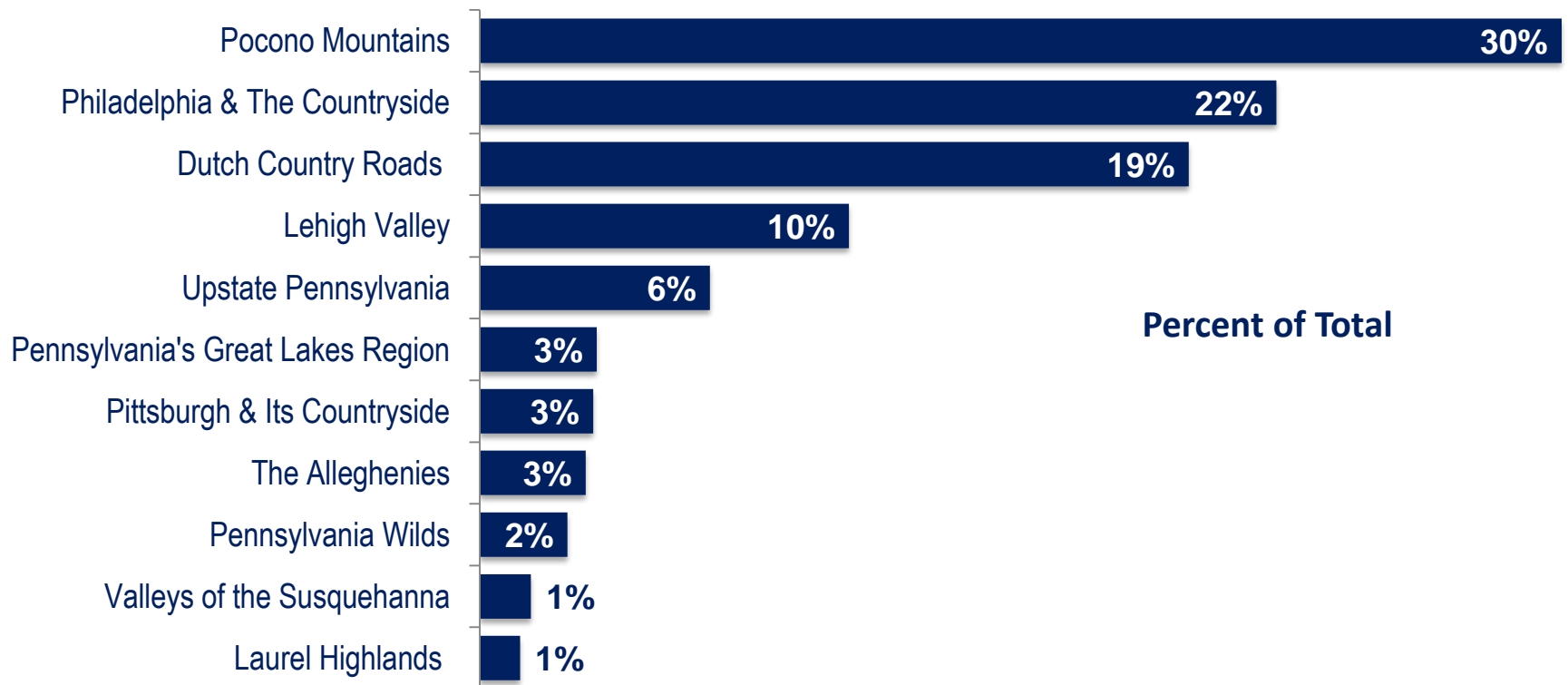


Pennsylvania Tourism Regions Visited by New Jersey Residents



Base: Marketable Overnight Trips

The Pocono Mountains has remained the most popular PA destination for marketable overnight travelers from New Jersey for at least the past four years.

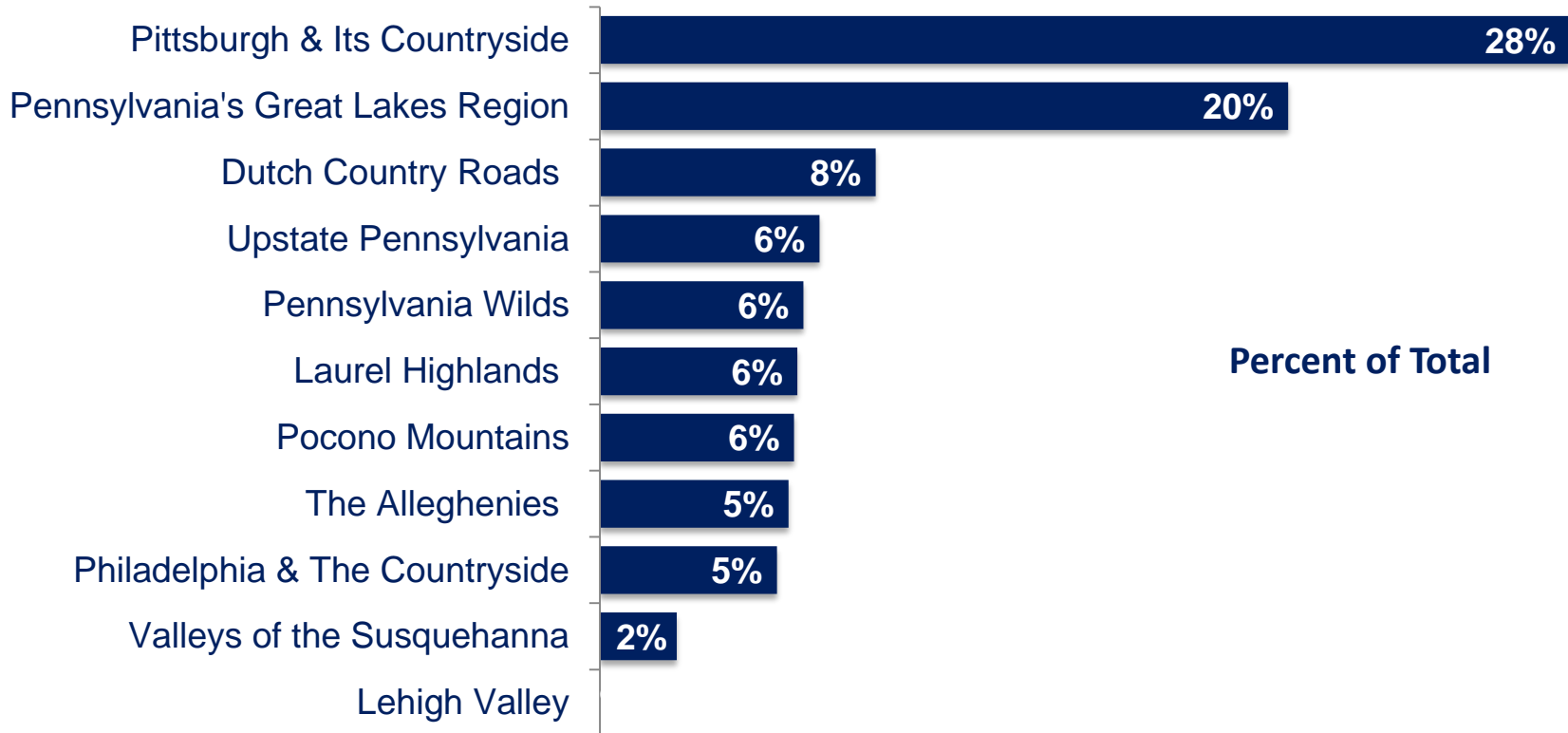


Pennsylvania Tourism Regions Visited by Ohio Residents



Base: Marketable Overnight Trips

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

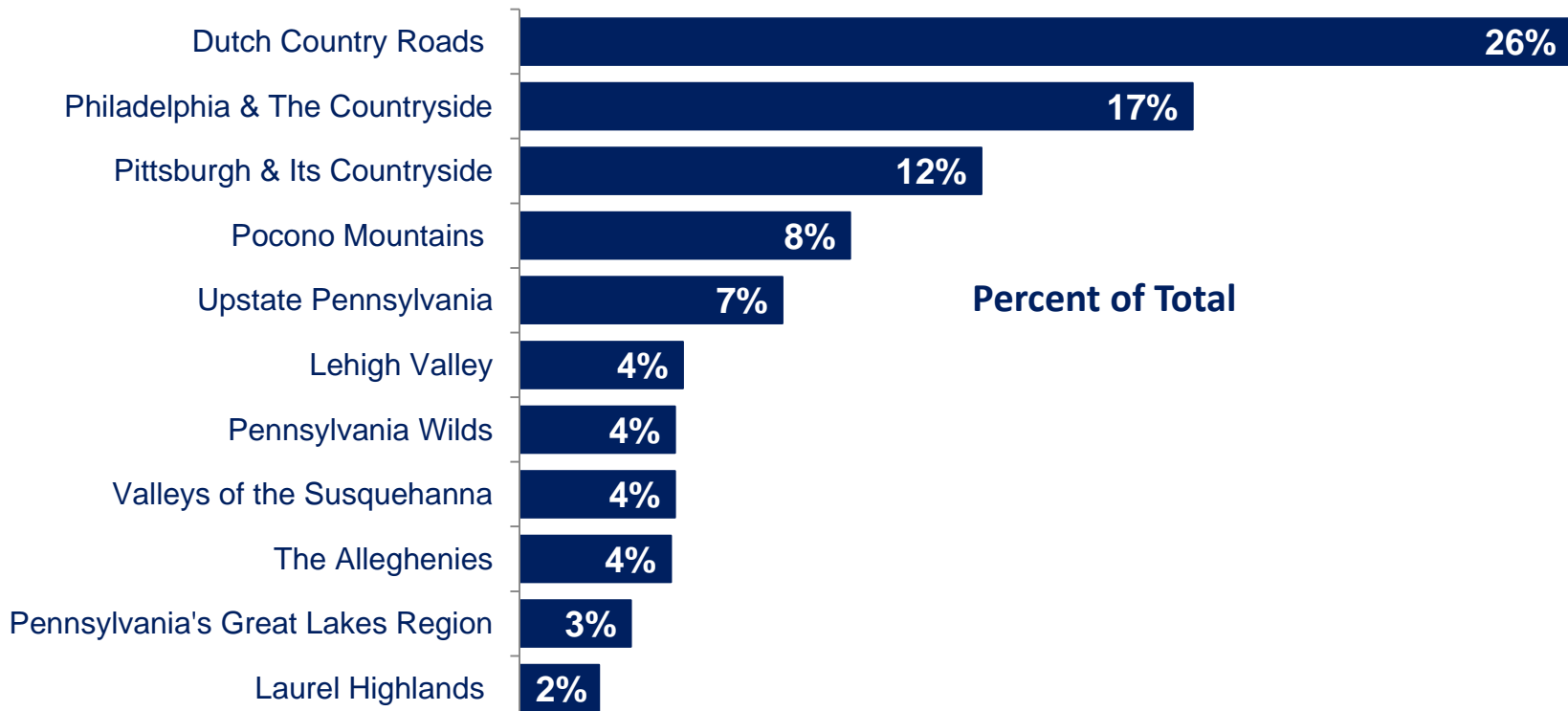


Pennsylvania Tourism Regions Visited by Maryland Residents



Base: Marketable Overnight Trips

The Dutch Country Roads region continued to be the most popular PA destination for marketable overnight travelers from the Washington, D.C.-Delaware-Maryland-Virginia market in 2014.



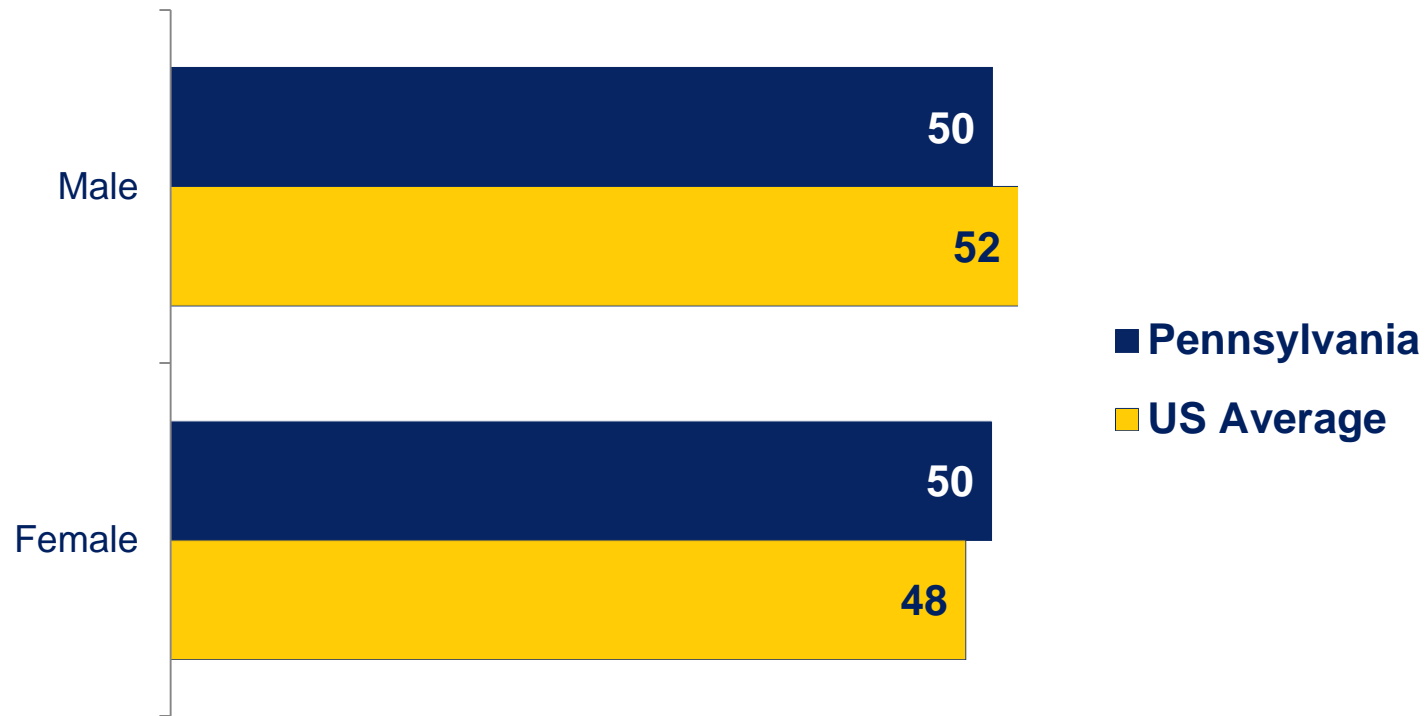
Traveler Profile — PA Marketable Overnight Trips

Gender



Base: Overnight Marketable Trips

Percent of Total

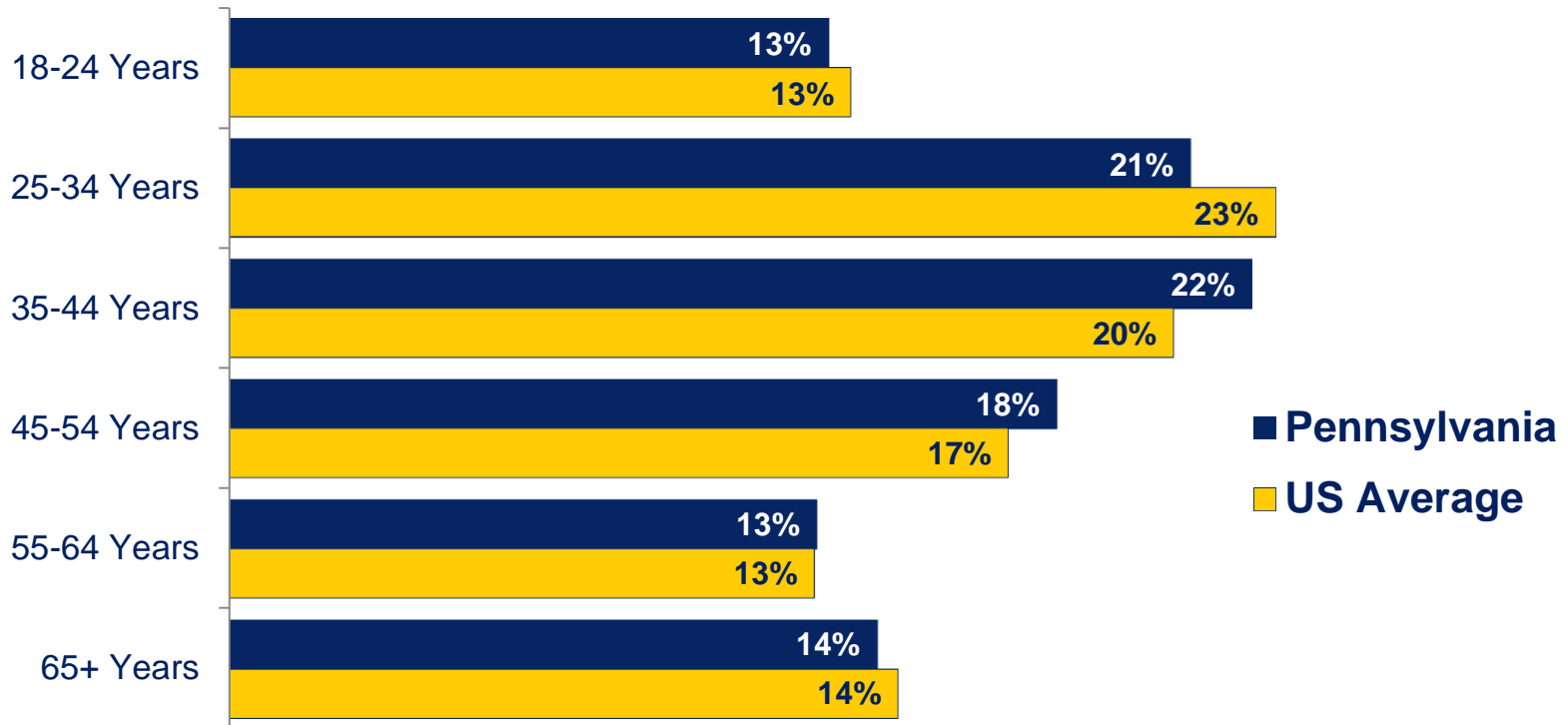


Age of Adult Travelers



Base: Overnight Marketable Trips

Percent of Total



■ Pennsylvania
■ US Average

Pennsylvania US Average
Median Age 42.7 42.1

Race



Base: Overnight Marketable Trips

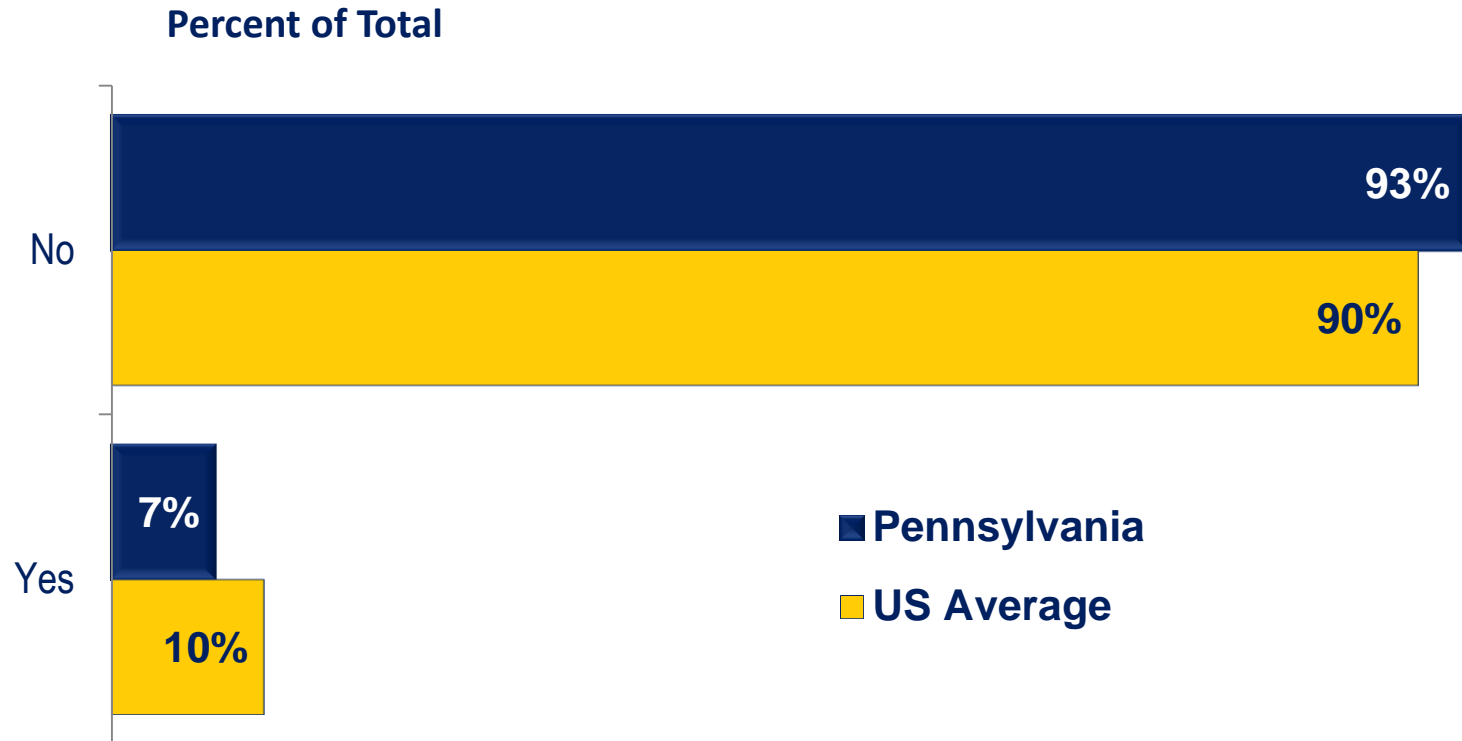
Percent of Total



Hispanic Background



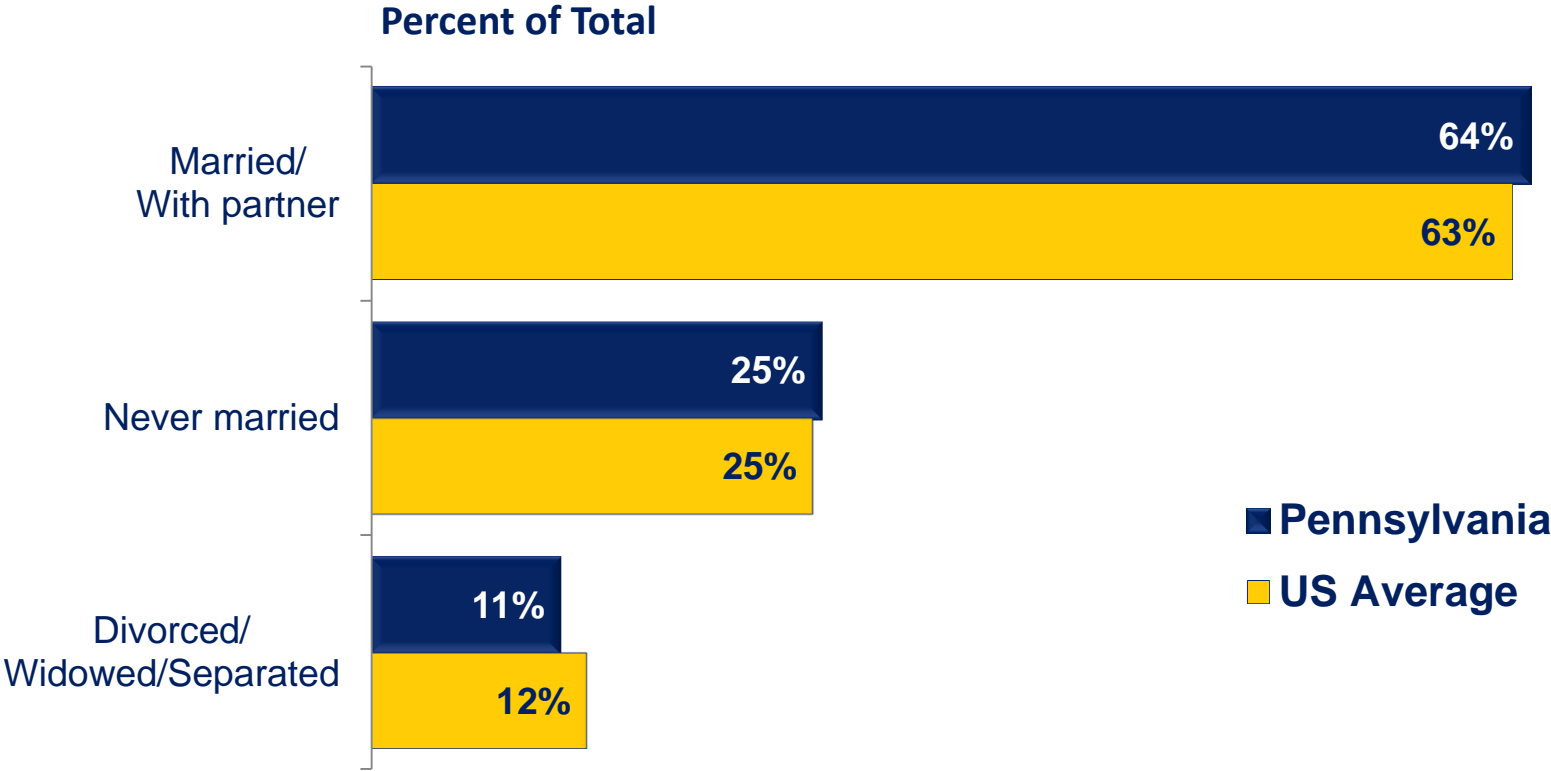
Base: Overnight Marketable Trips



Marital Status



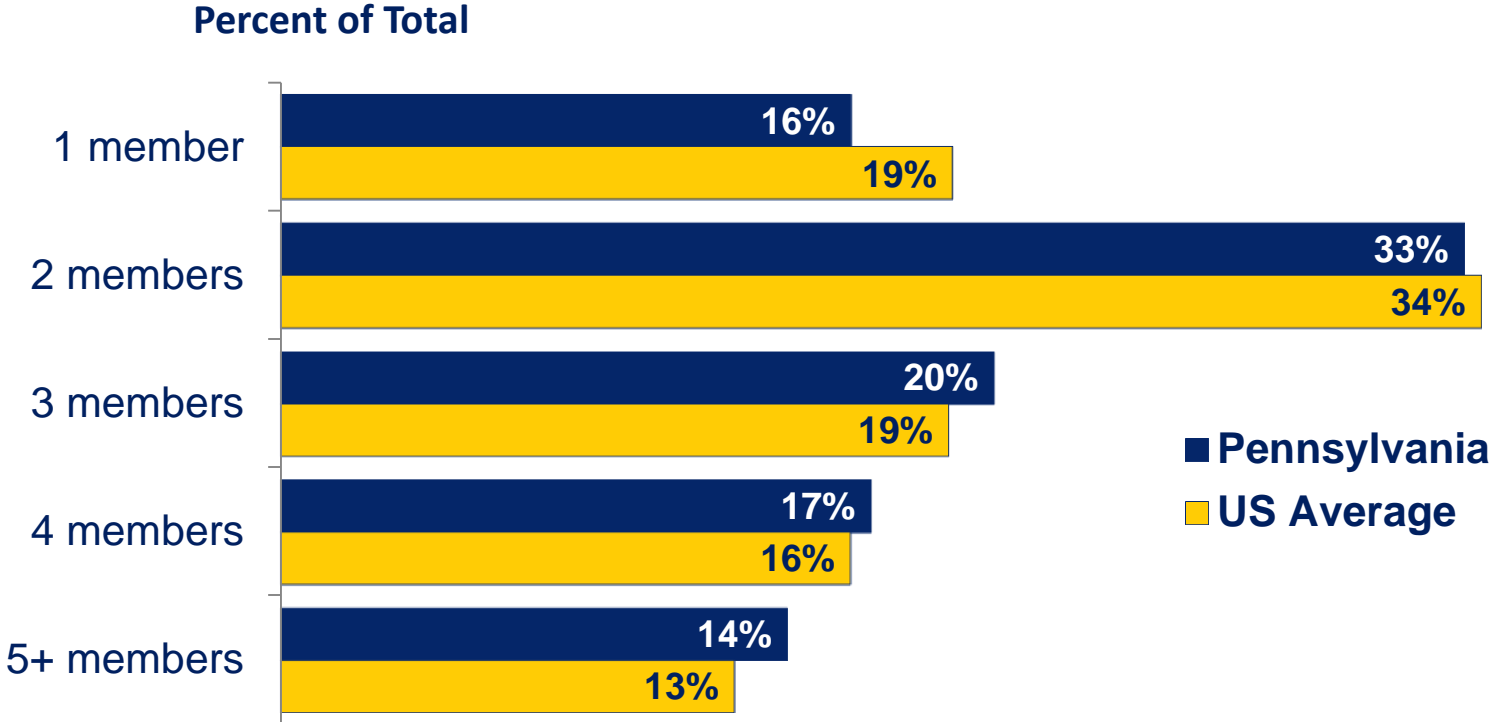
Base: Overnight Marketable Trips



Household Size



Base: Overnight Marketable Trips



Average Household Size: Pennsylvania 3.0 United States 2.9

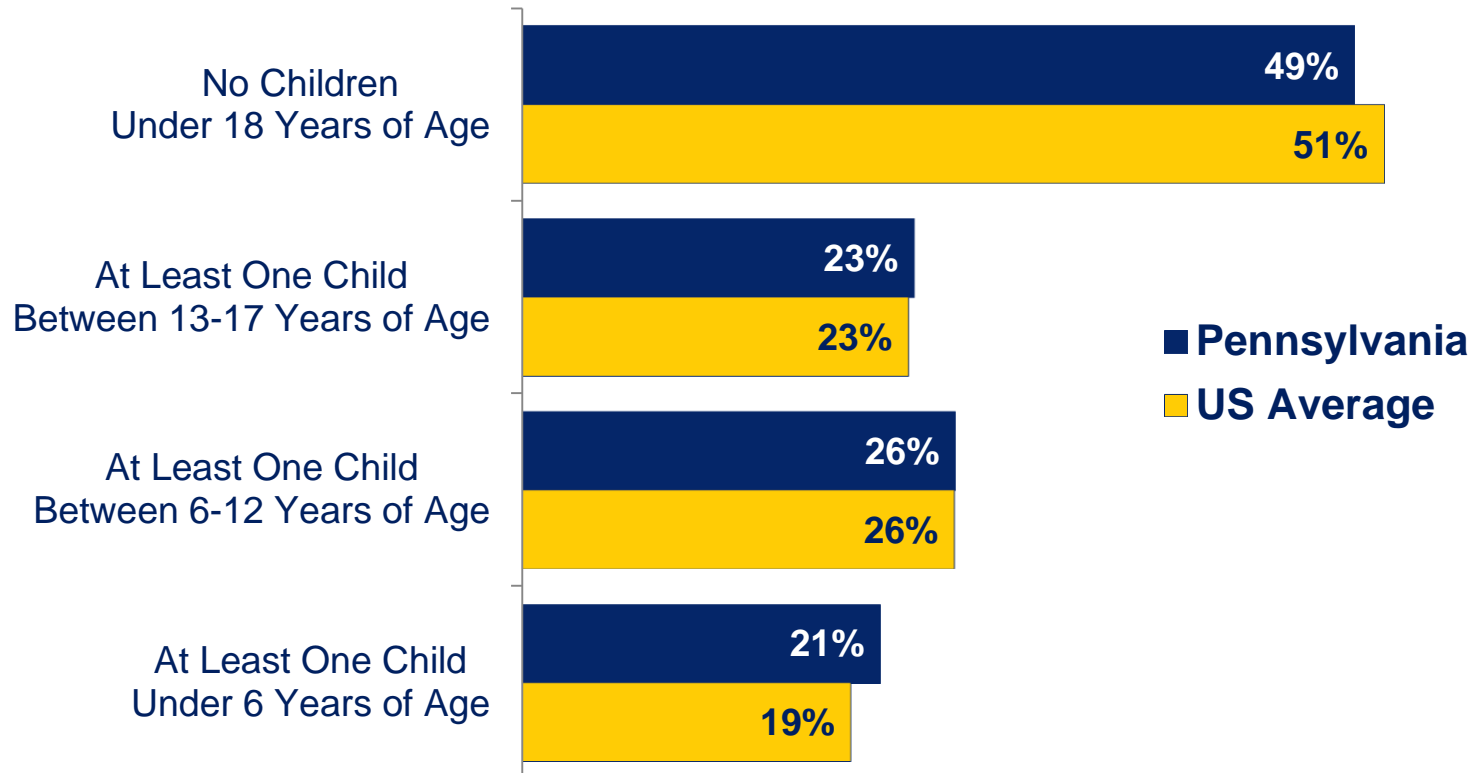
Presence of Children in Household



Base: Overnight Marketable Trips

On average, Pennsylvania travelers were more likely to have young children.

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

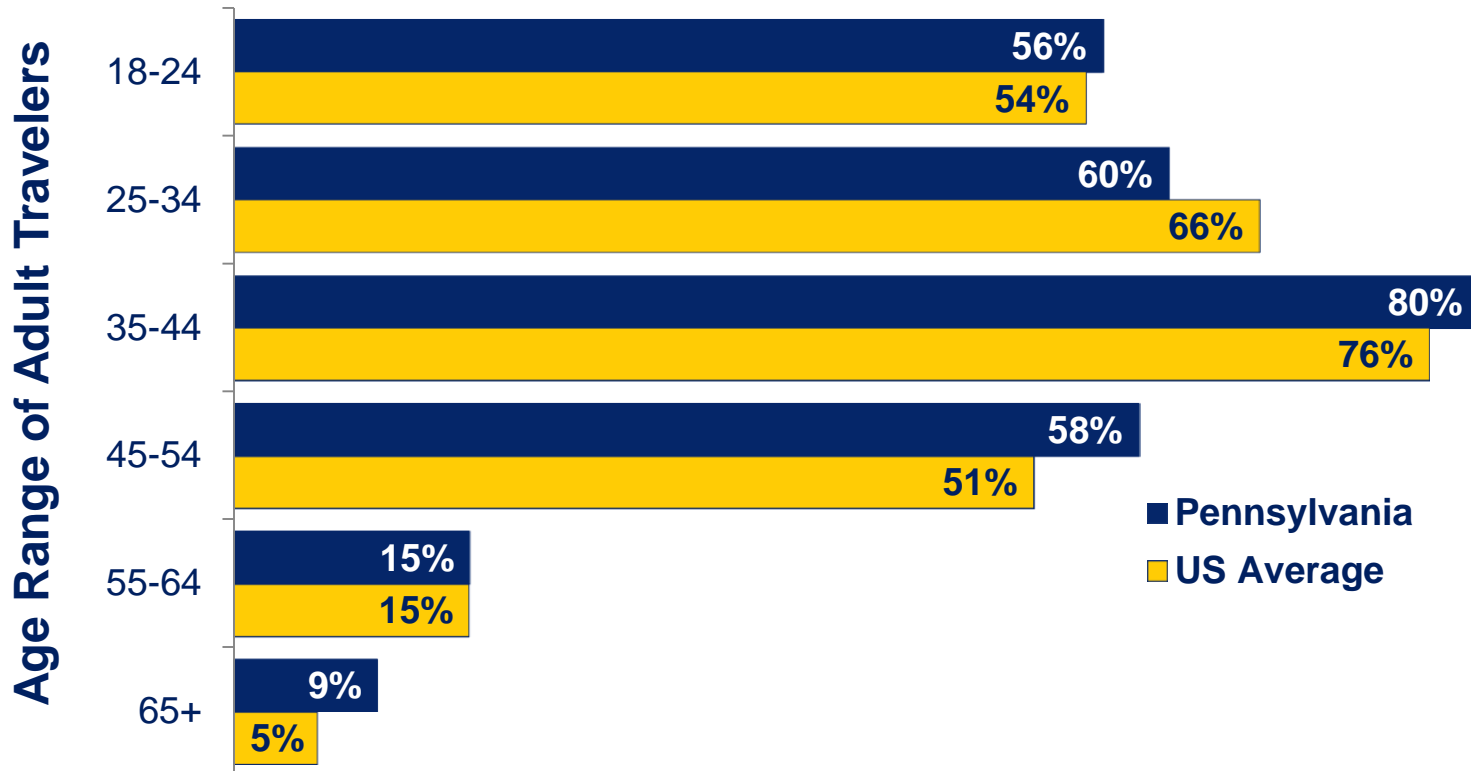


Presence of Children in Household by Age of Adult Traveler



Base: Overnight Marketable Trips

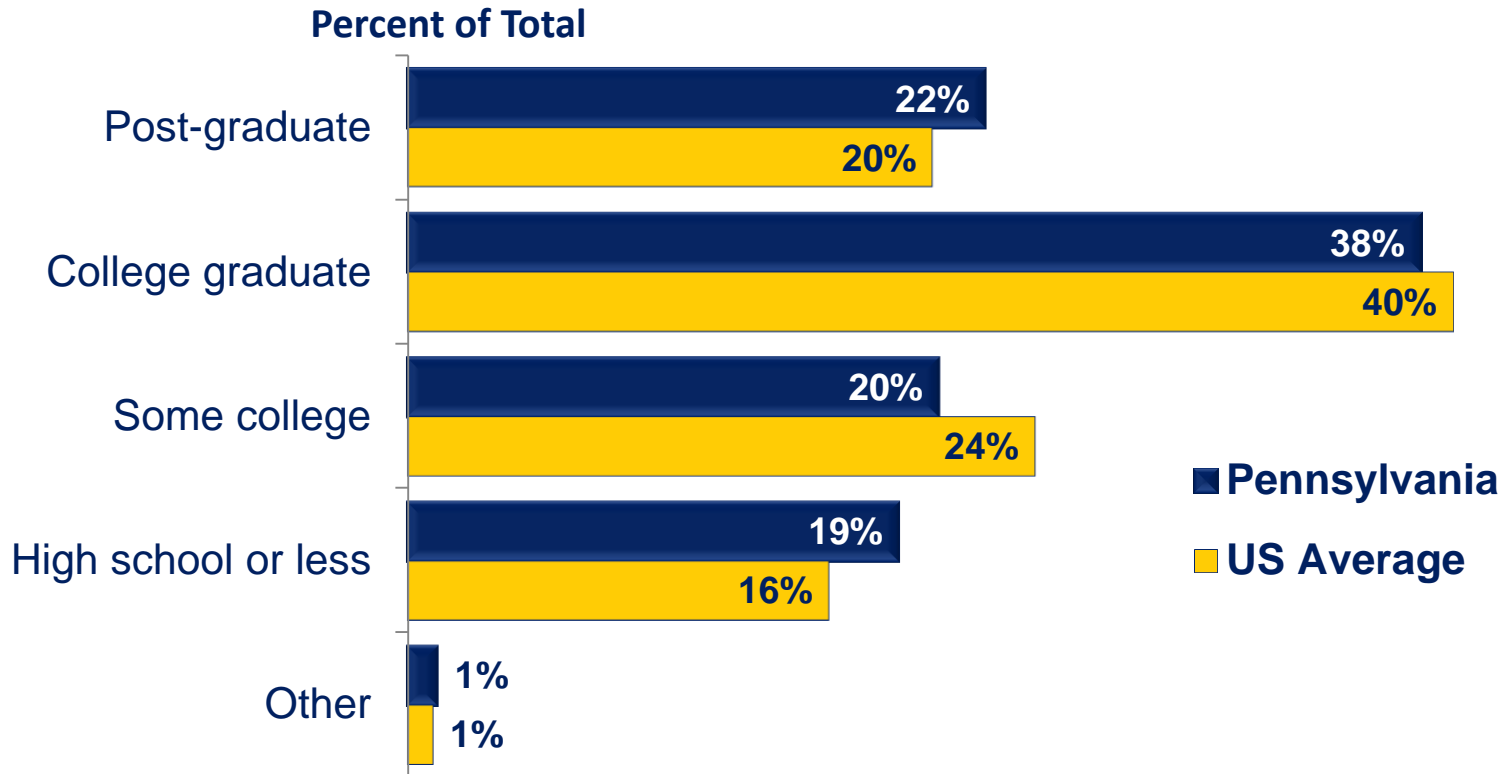
Percent of Adult Travelers with Children Under Age 18 Living at Home



Education



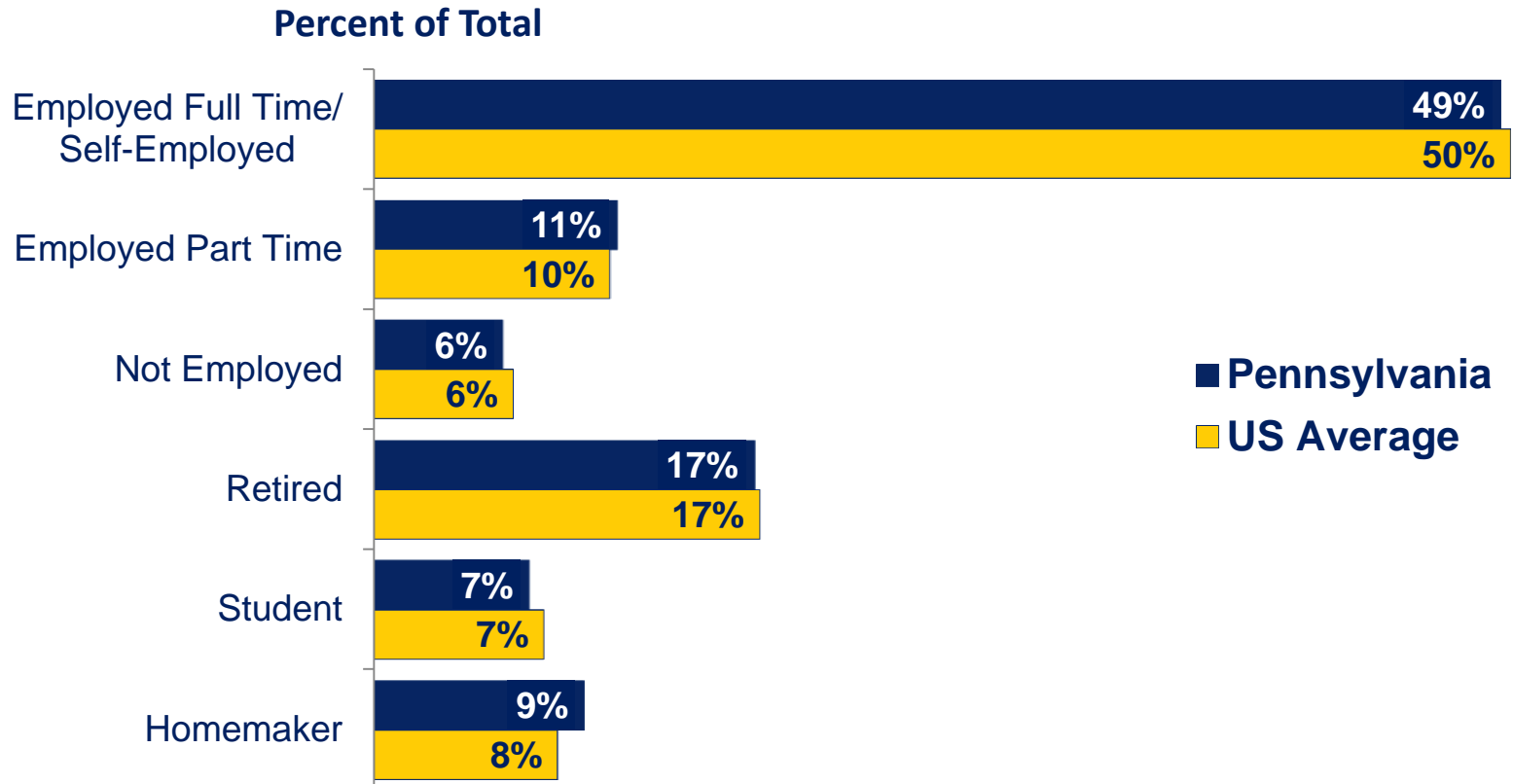
Base: Overnight Marketable Trips



Employment



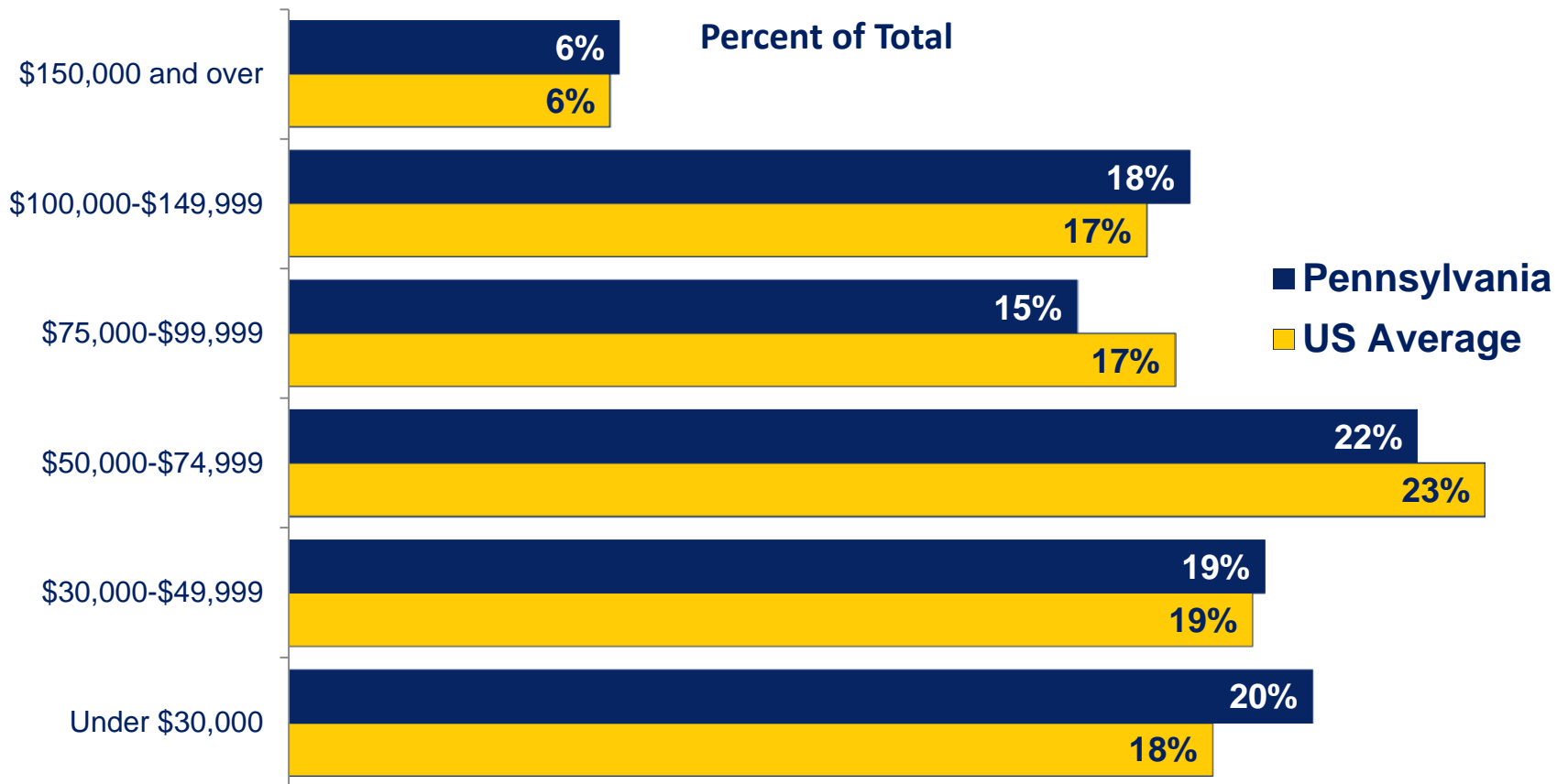
Base: Overnight Marketable Trips



Income



Base: Overnight Marketable Trips



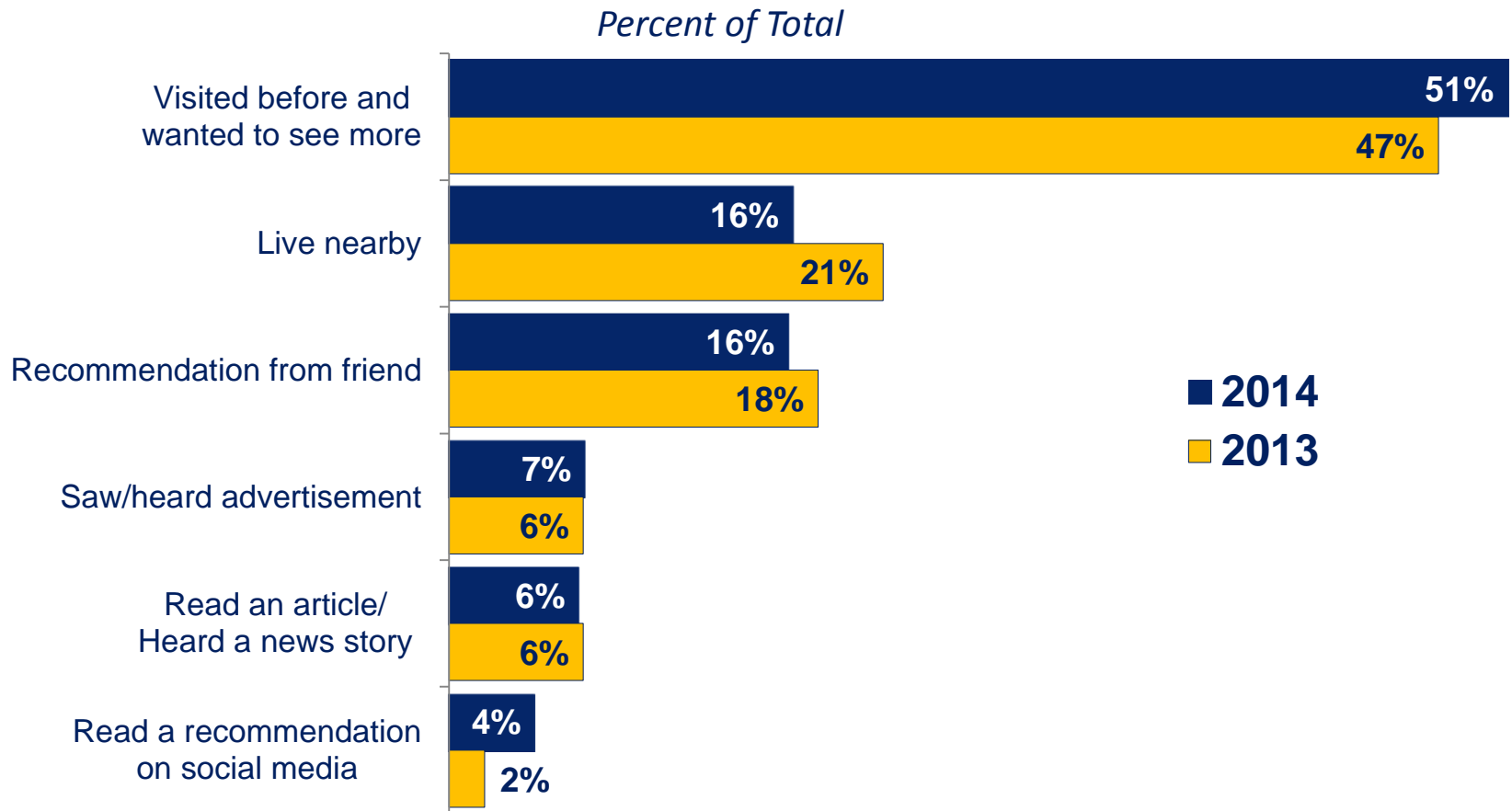
Trip Planning & Booking

2014 Marketable Overnight Trips

Main Reason for Choosing Pennsylvania



Base: Overnight Marketable Trips

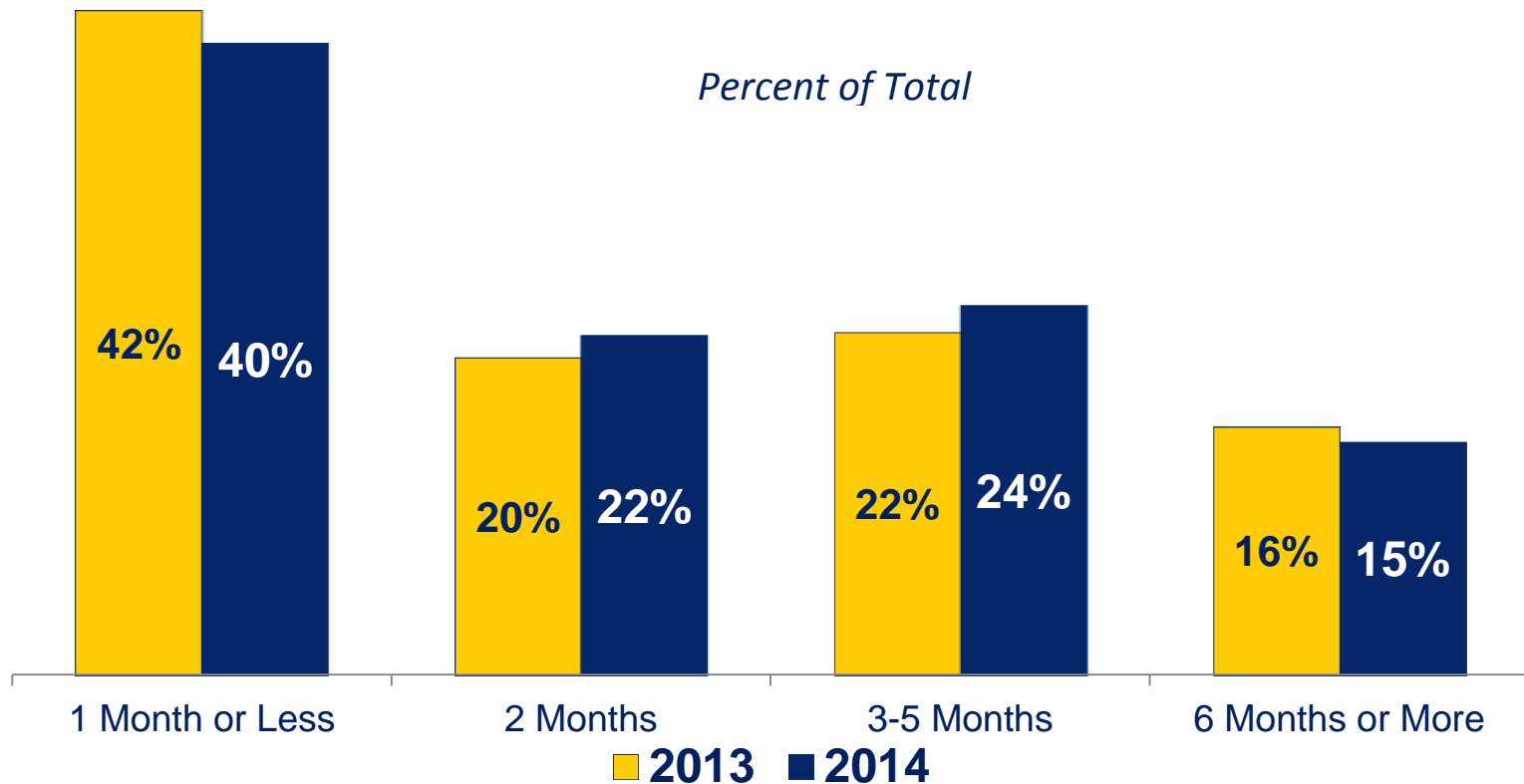


Pennsylvania 2014 Trip Planning Horizon



Base: Overnight Marketable Trips

Travelers most often planned their PA trip within a month or less of hitting the road.

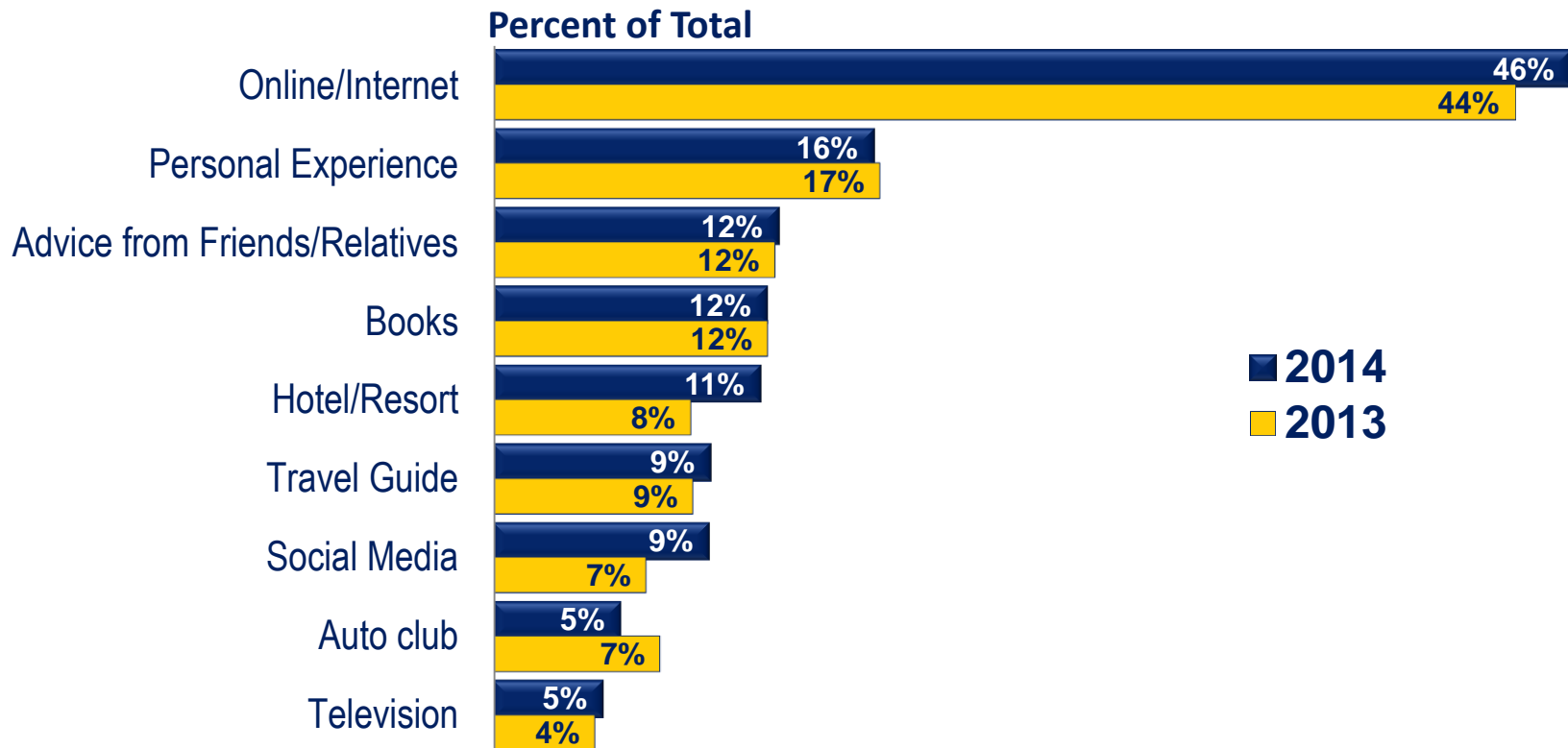


Information Sources Used for Planning the Trip



Base: Overnight Marketable Trips

The Internet continues to gain dominance as the main trip planning tool and information source for travelers.

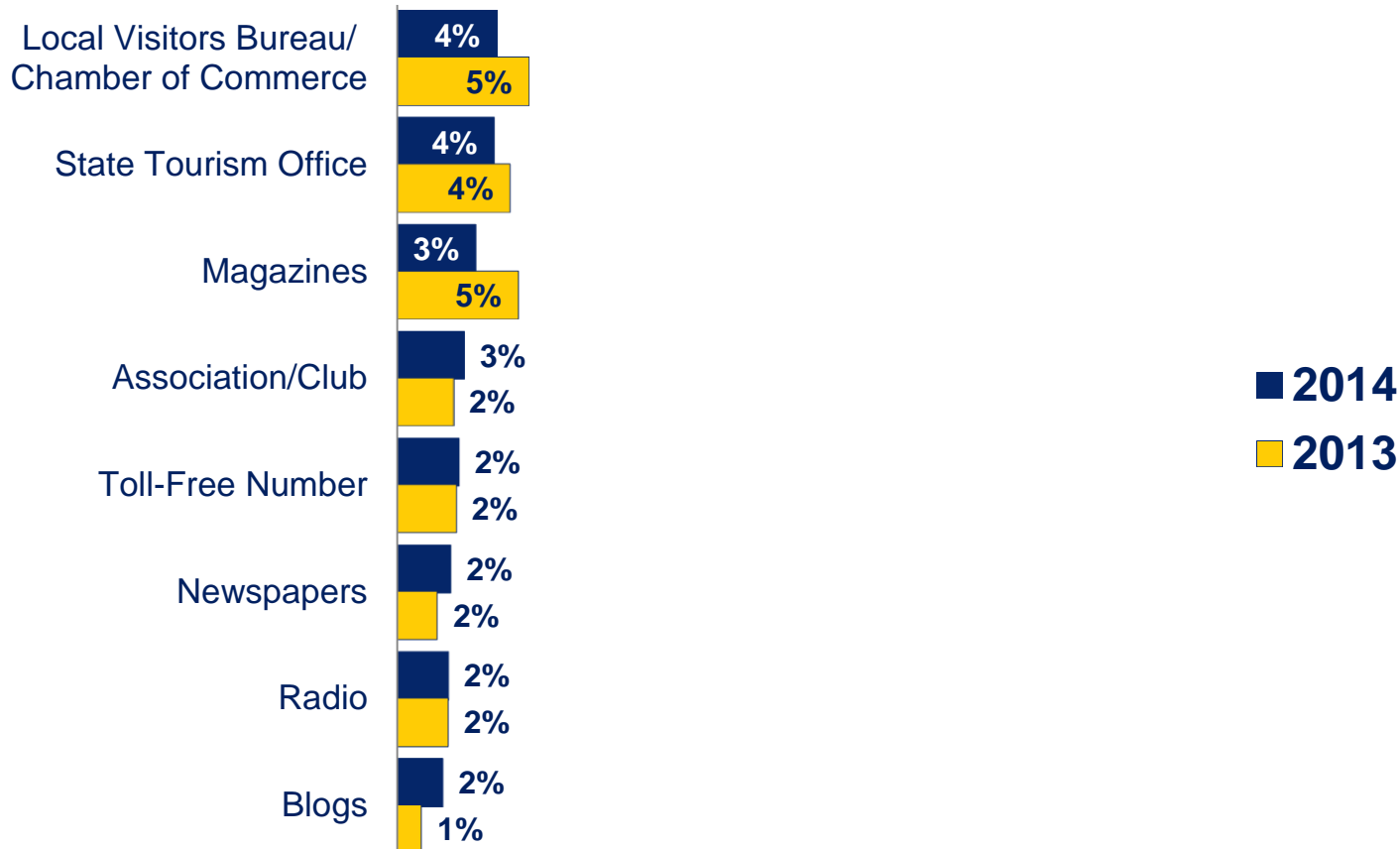


Information Sources Used for Planning the Trip (Cont'd)



Base: Overnight Marketable Trips

Percent of Total

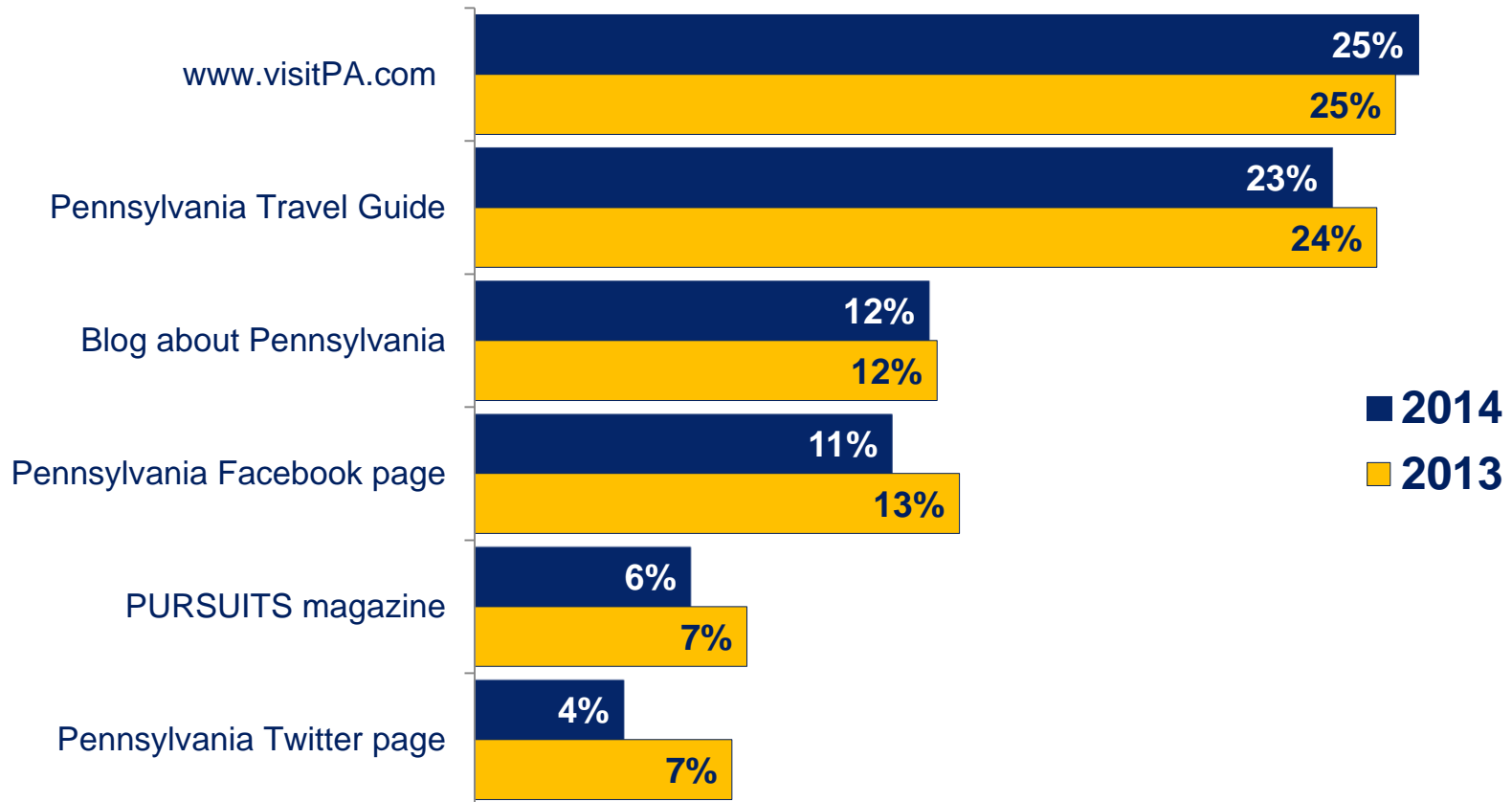


Use of Pennsylvania Tourism Office Trip Planning Tools



Base: Overnight Marketable Trips

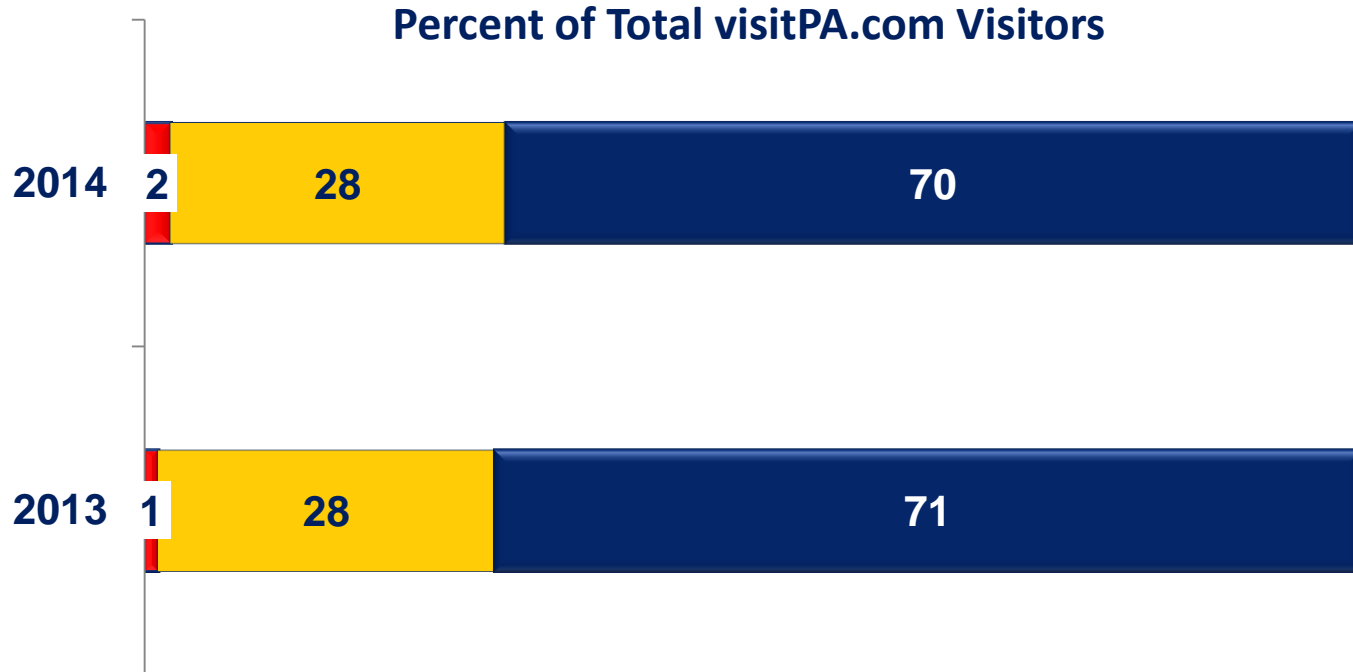
Percent of Total



www.visitPA.com Usefulness



Base: Overnight Marketable Trips



3-Pt. Scale:

■ Not Very Useful

■ Somewhat Useful

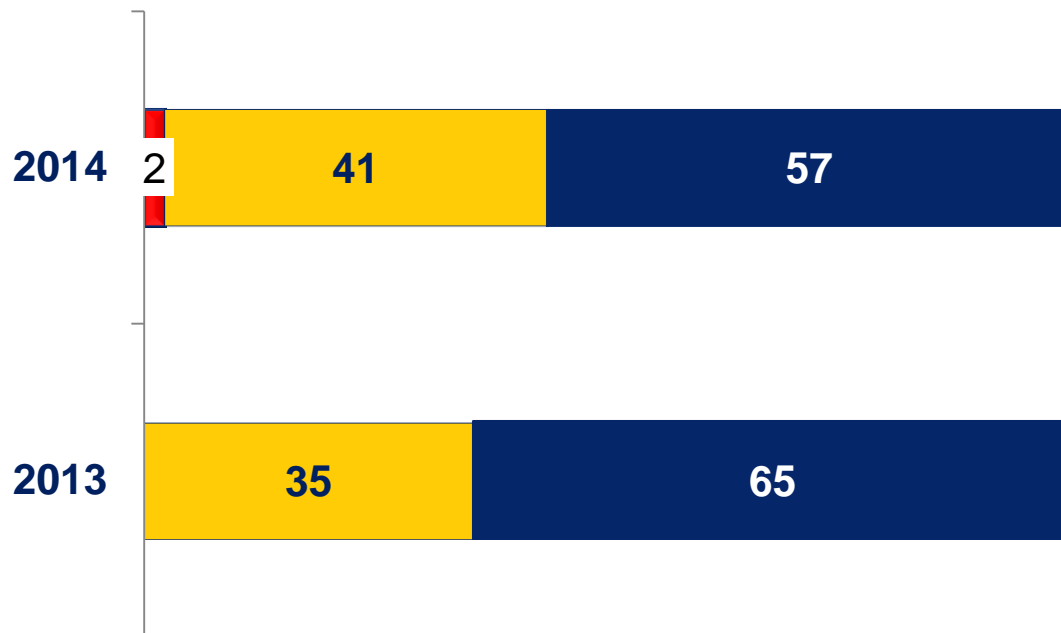
■ Very Useful

Pennsylvania Travel Guide Usefulness



Base: Overnight Marketable Trips

Percent of Total Pennsylvania Travel Guide Users

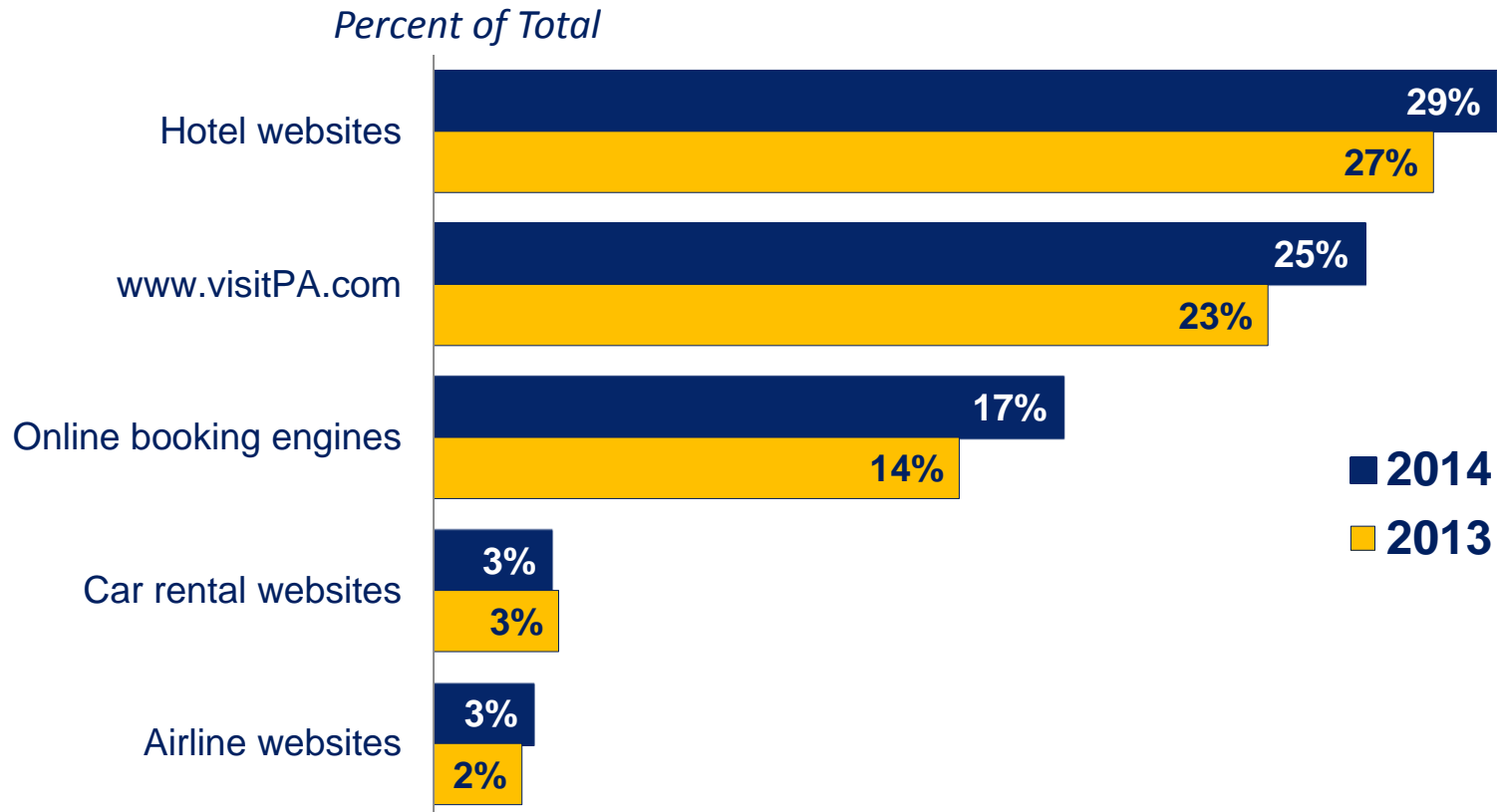


3-Pt. Scale: ■ Not Very Useful ■ Somewhat Useful ■ Very Useful

Websites Used for Planning Pennsylvania Trip



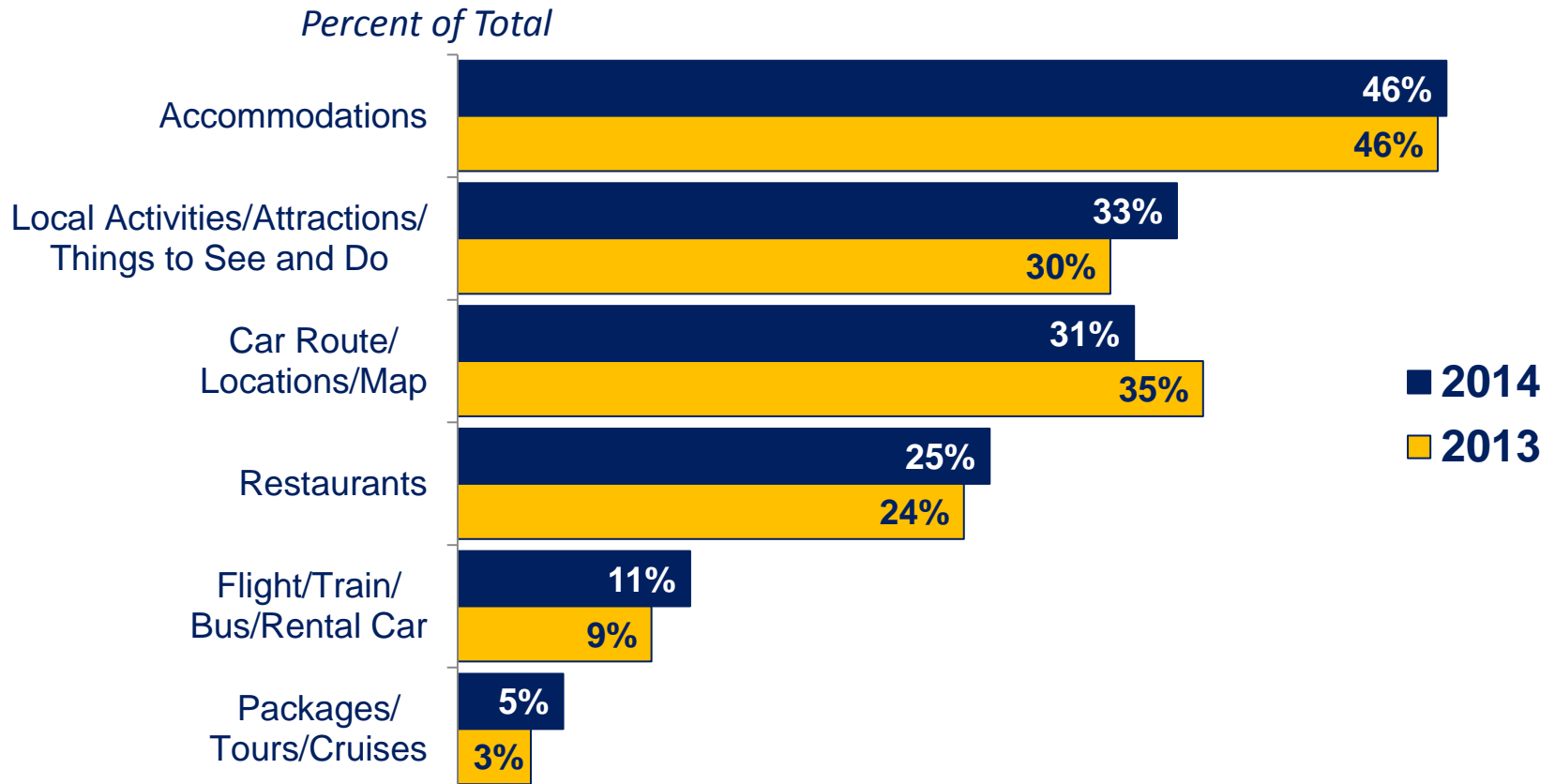
Base: Overnight Marketable Trips



Trip Elements Planned Using Internet



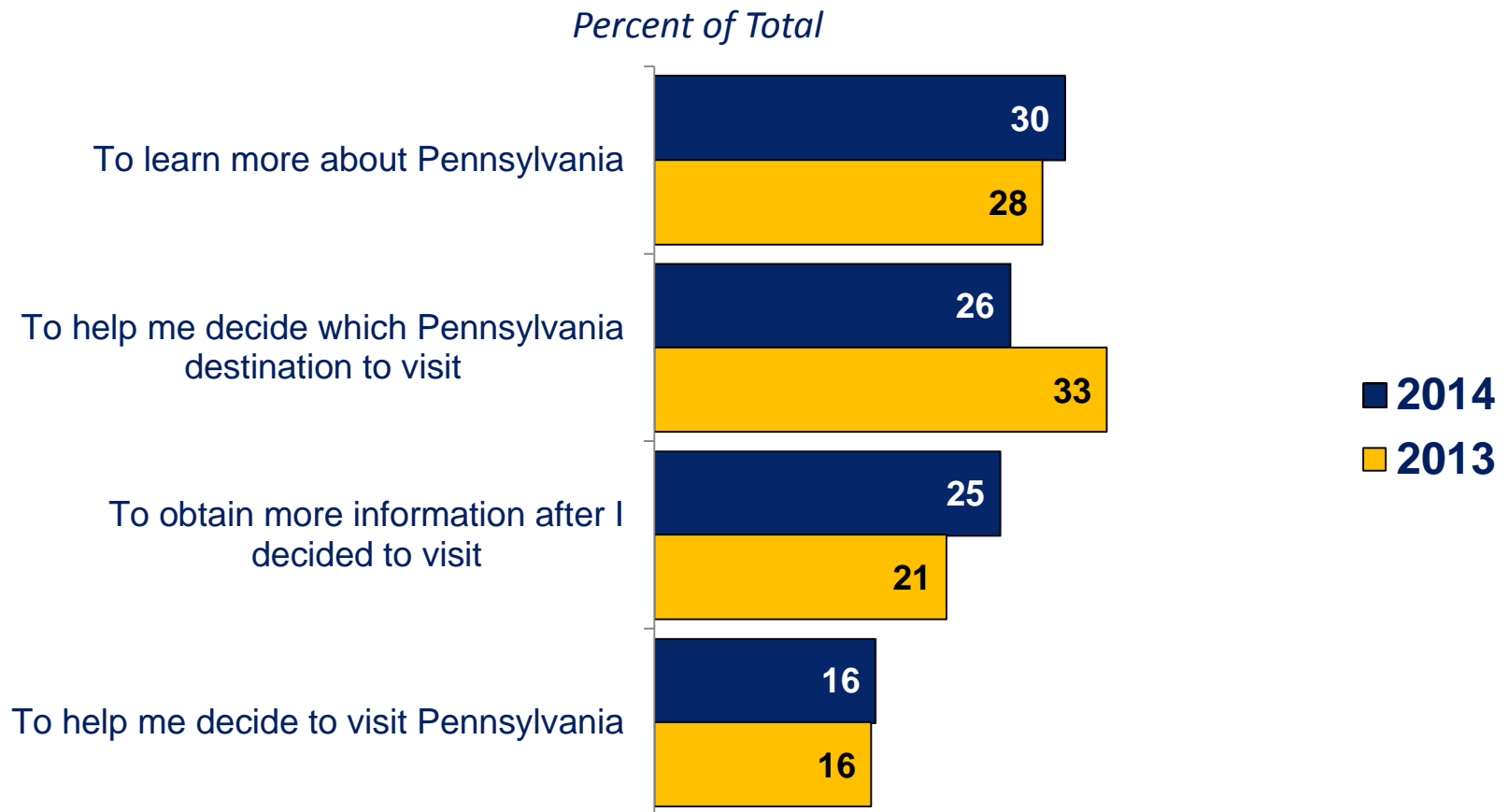
Base: Overnight Marketable Trips



Reasons for Visiting www.visitpa.com



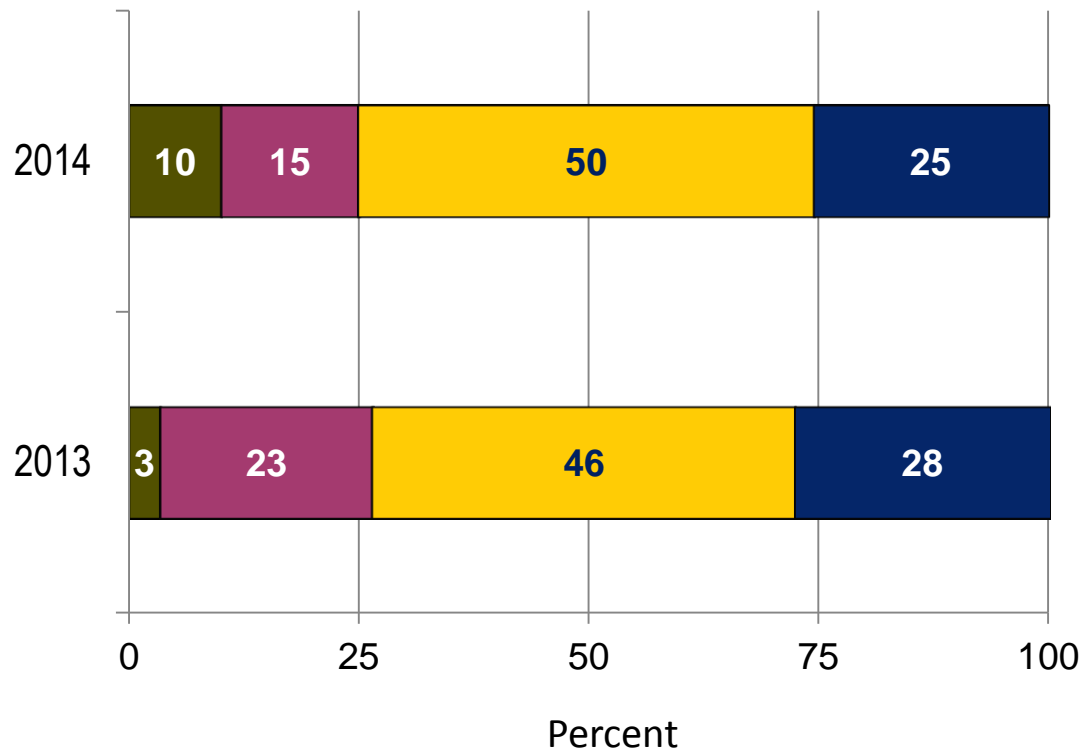
Base: Overnight Marketable Trips



www.visitpa.com Influence on Planning



Base: Overnight Marketable Trips

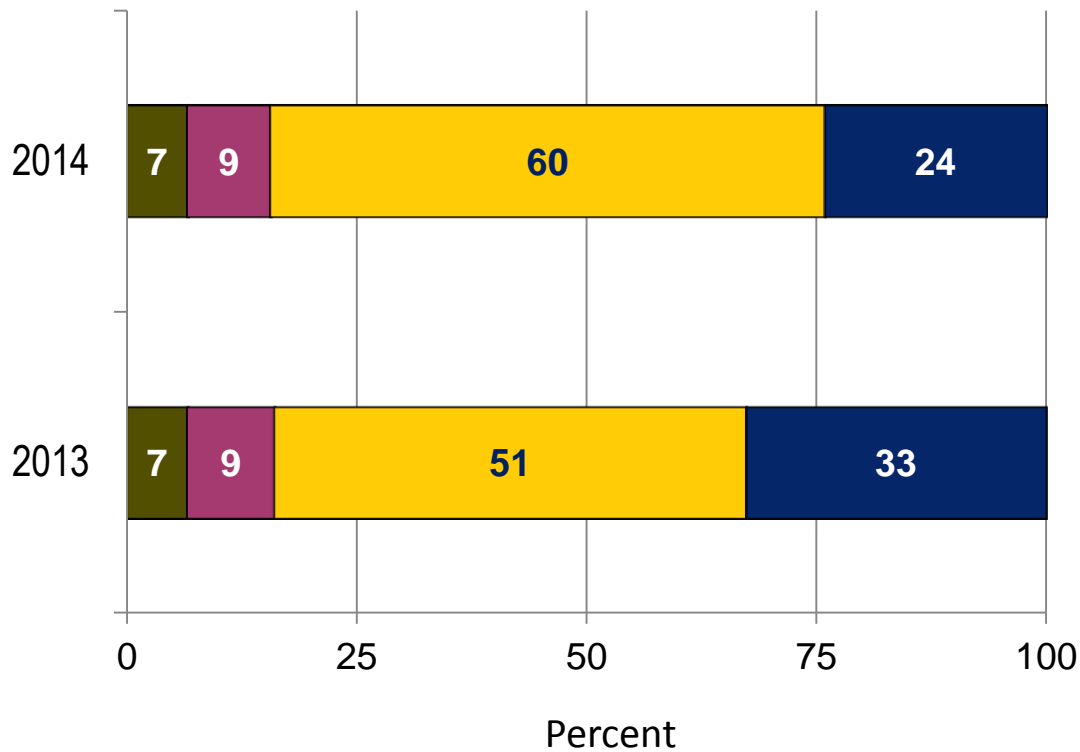


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

www.visitpa.com Influence on Visitation



Base: Overnight Marketable Trips

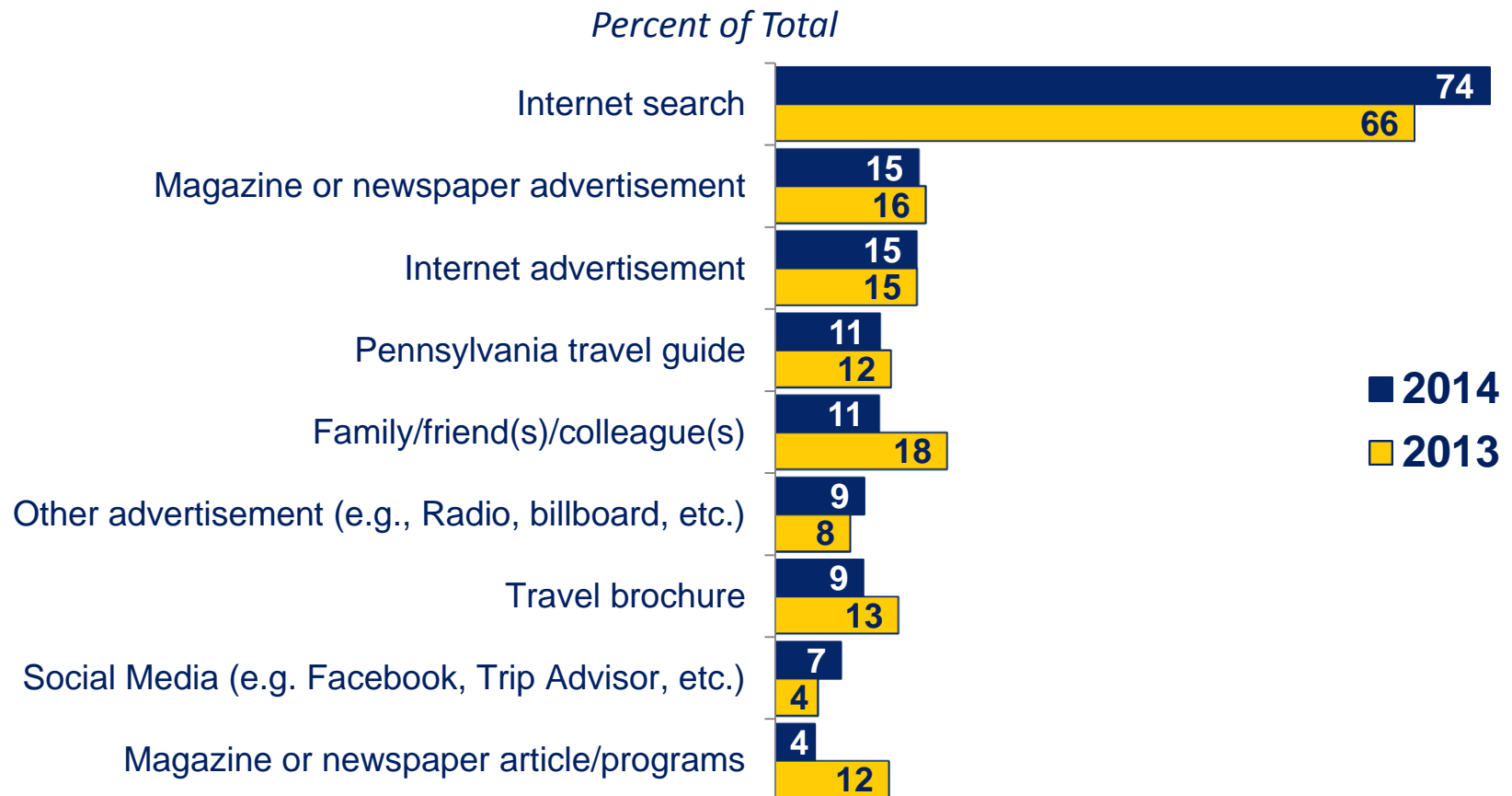


■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

Channels to www.visitpa.com



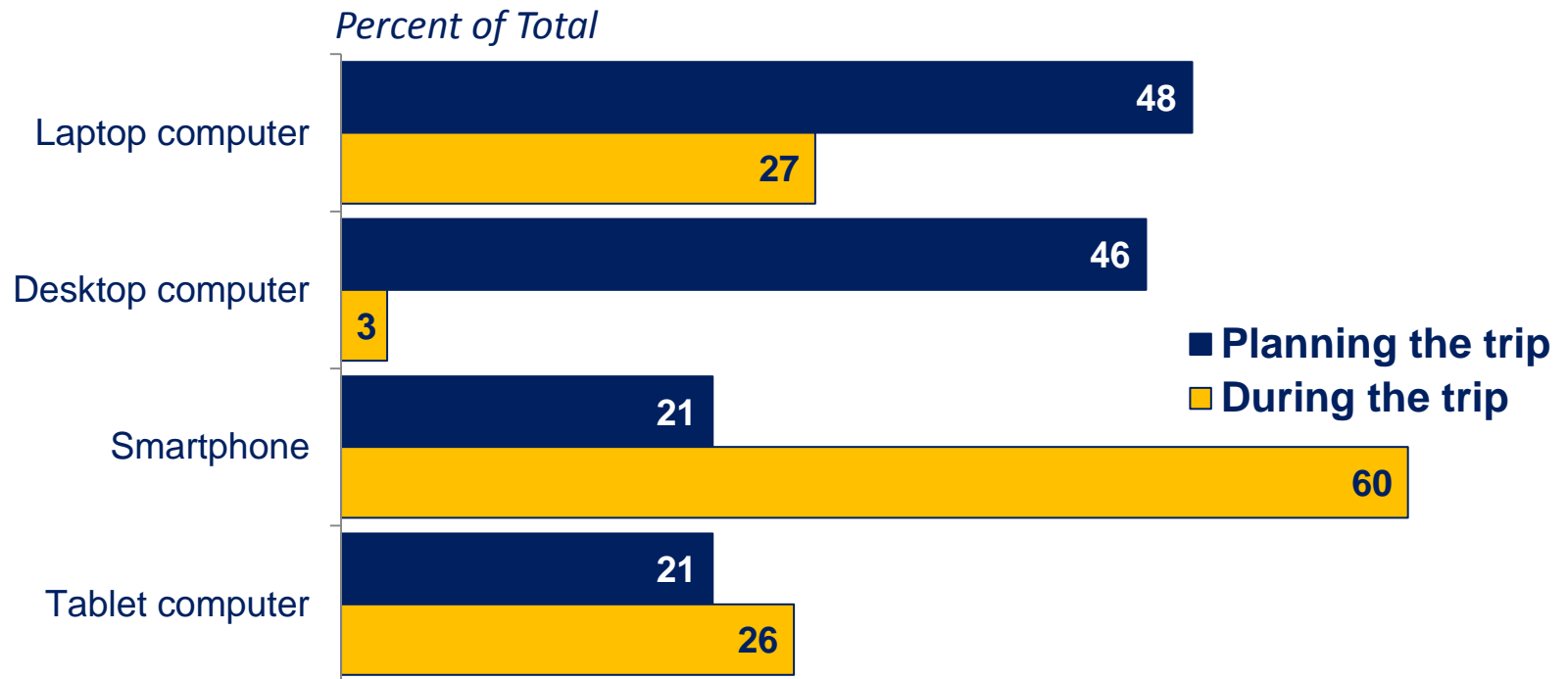
Base: Overnight Marketable Trips



Technology Used by Travelers



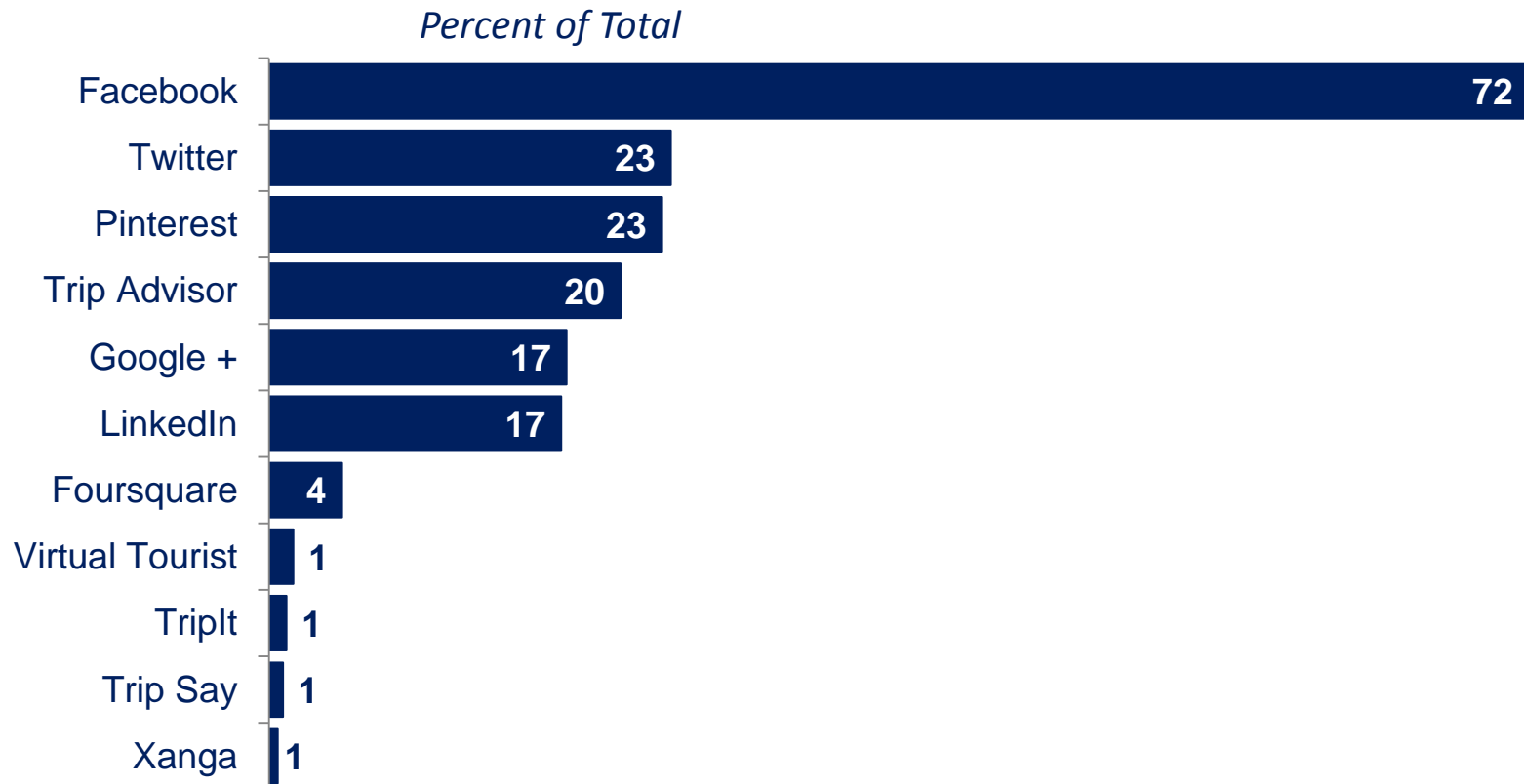
Base: Overnight Marketable Trips



Social Media Sites Used by Travelers



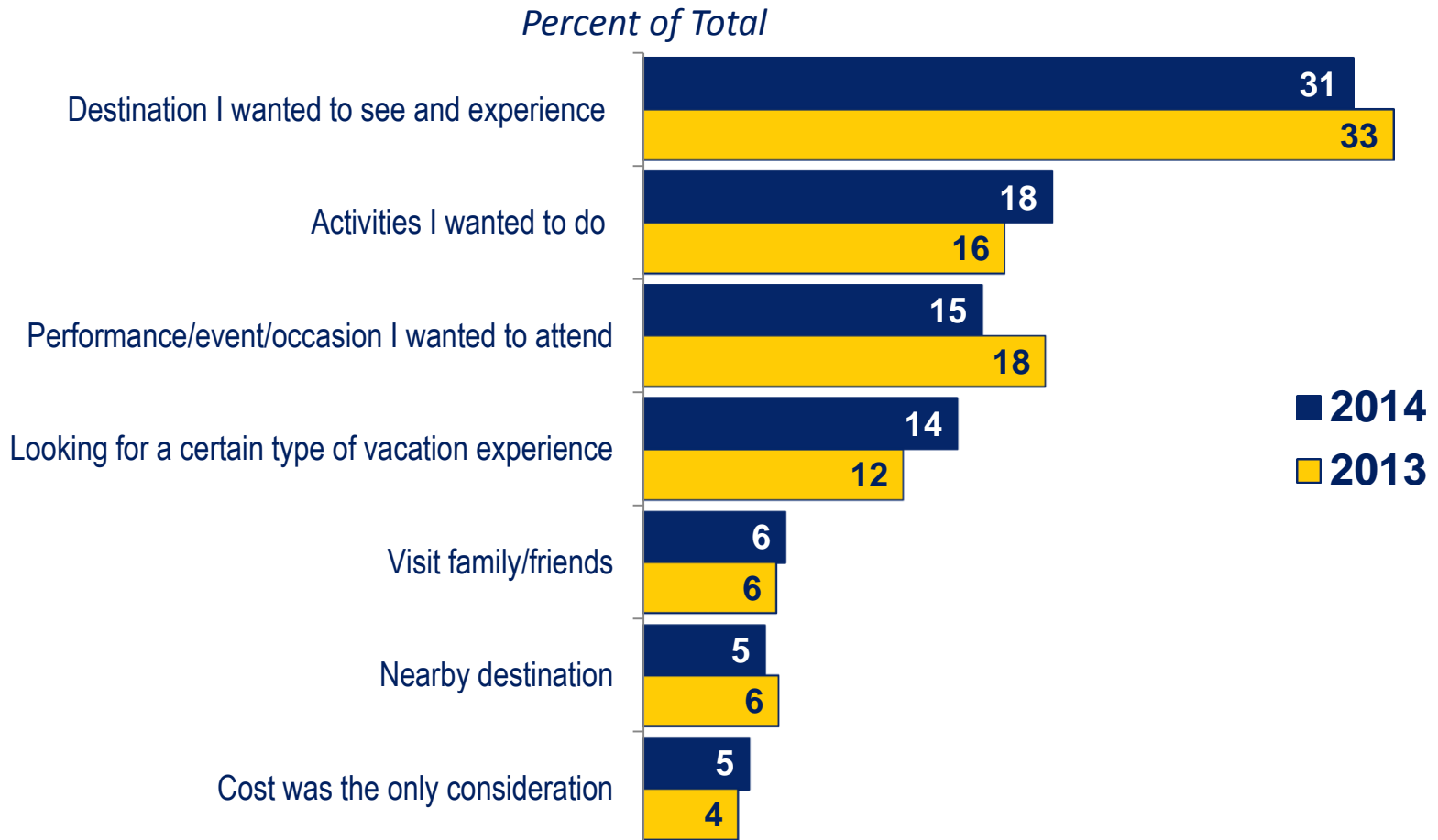
Base: Overnight Marketable Trips



Planning Considerations Beyond Cost



Base: Overnight Marketable Trips

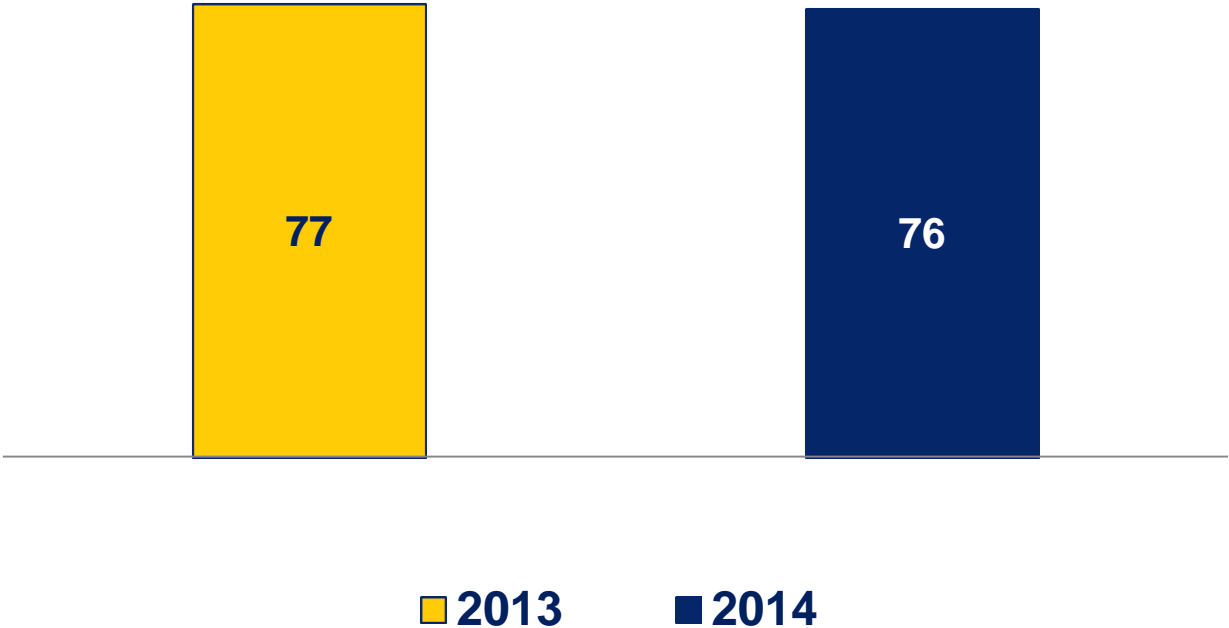


Percent of Travelers Booking In Advance



Base: Overnight Marketable Trips

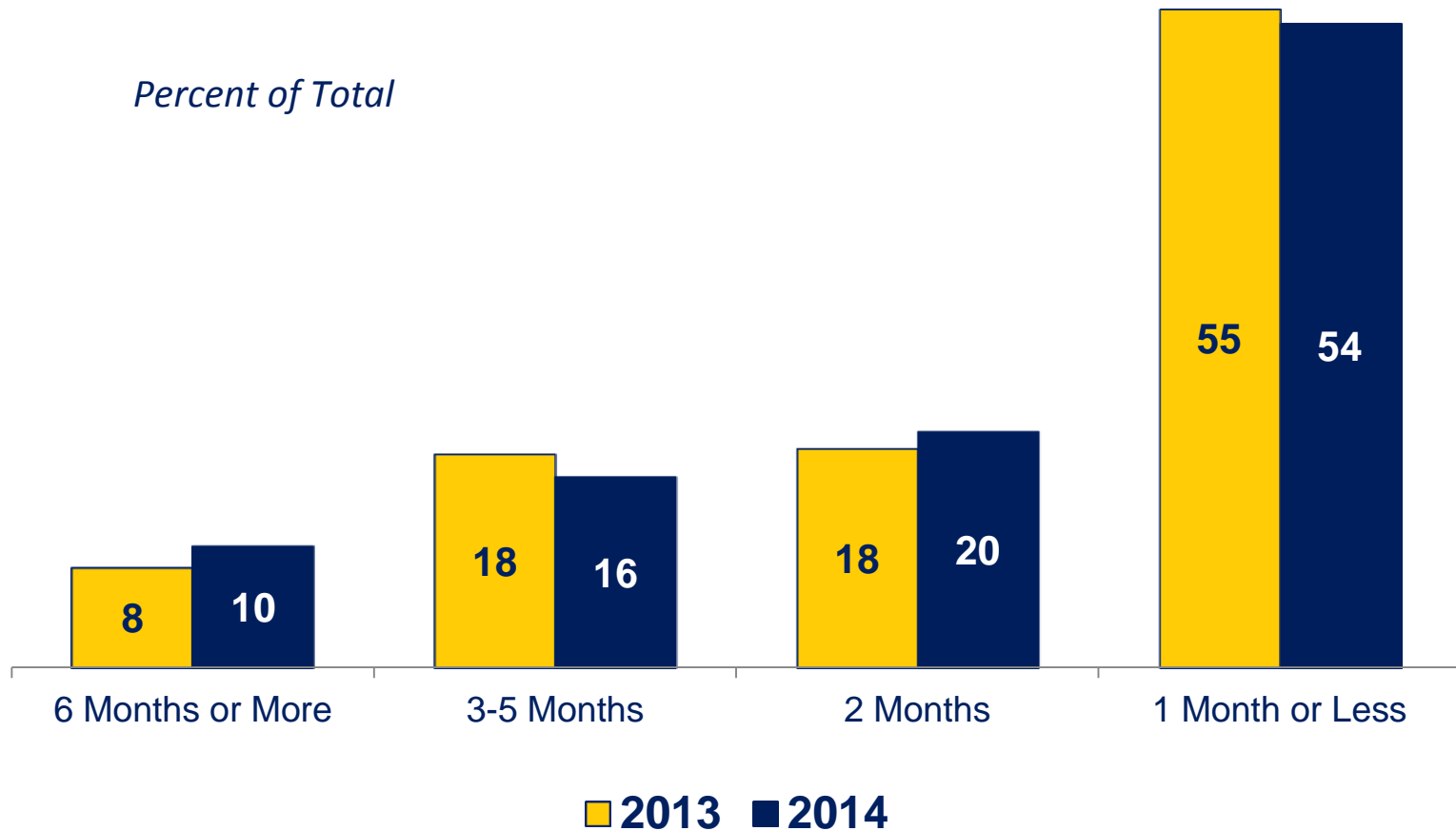
Percent of Total



Booking Cycle



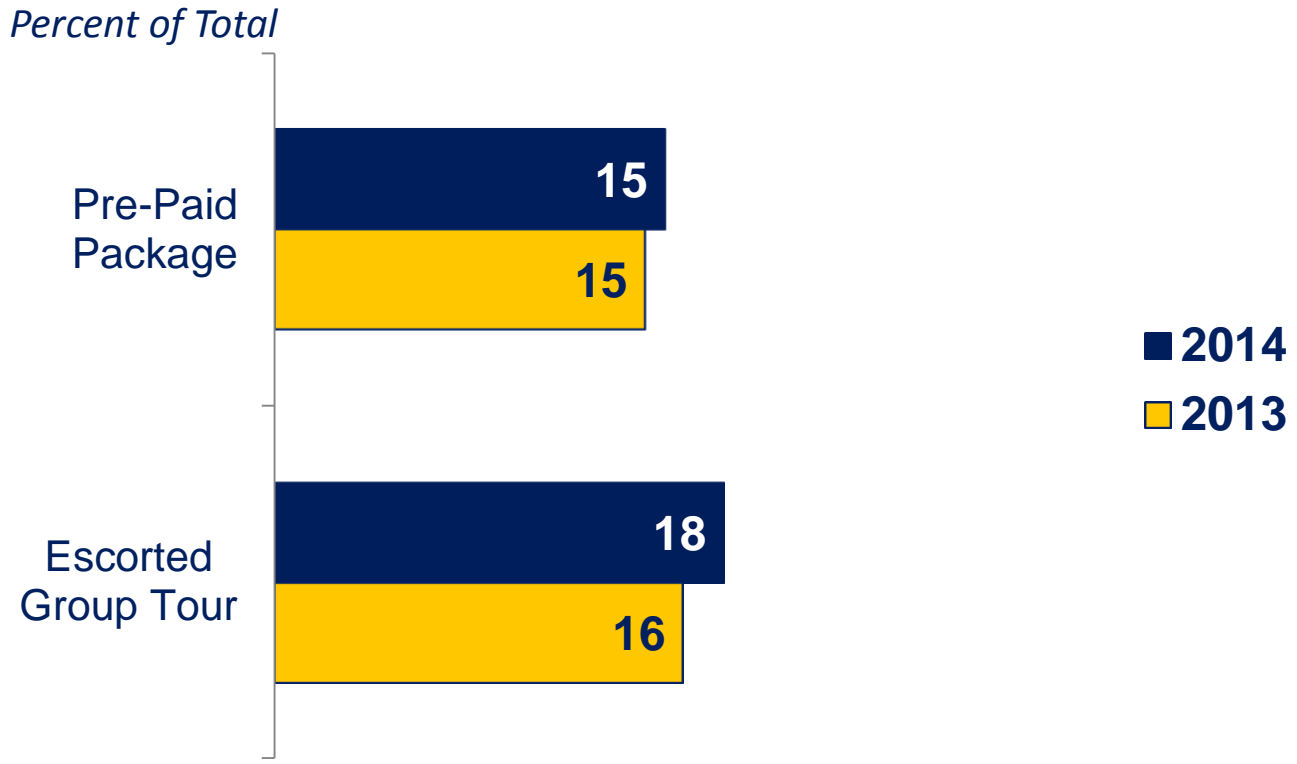
Base: Overnight Marketable Trips



Use of Vacation Packages and Group Tours



Base: Overnight Marketable Trips



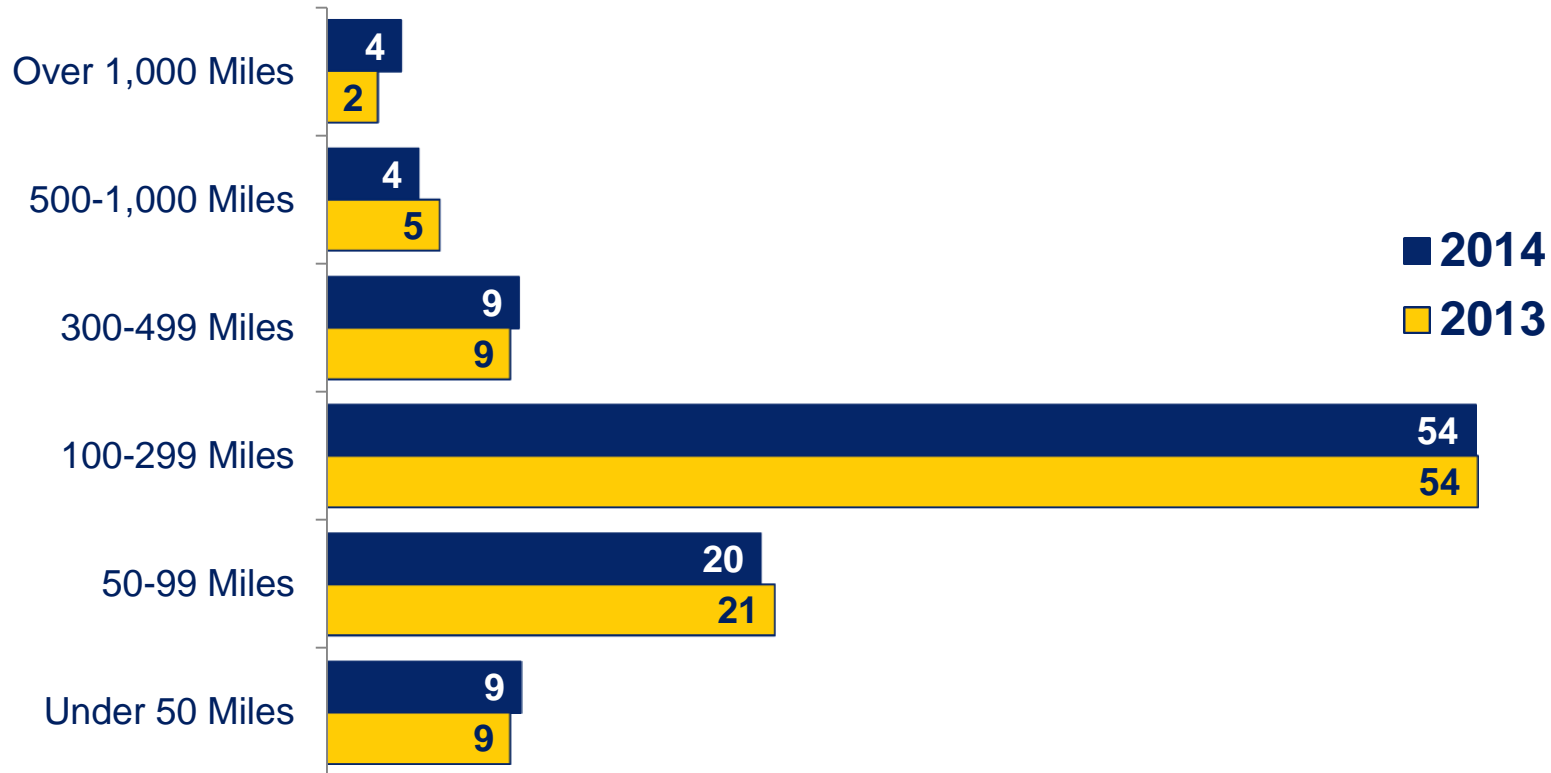
Trip Characteristics of Pennsylvania's Marketable Overnight Travelers

Distance Traveled to Pennsylvania



Base: Overnight Marketable Trips

Percent of Total

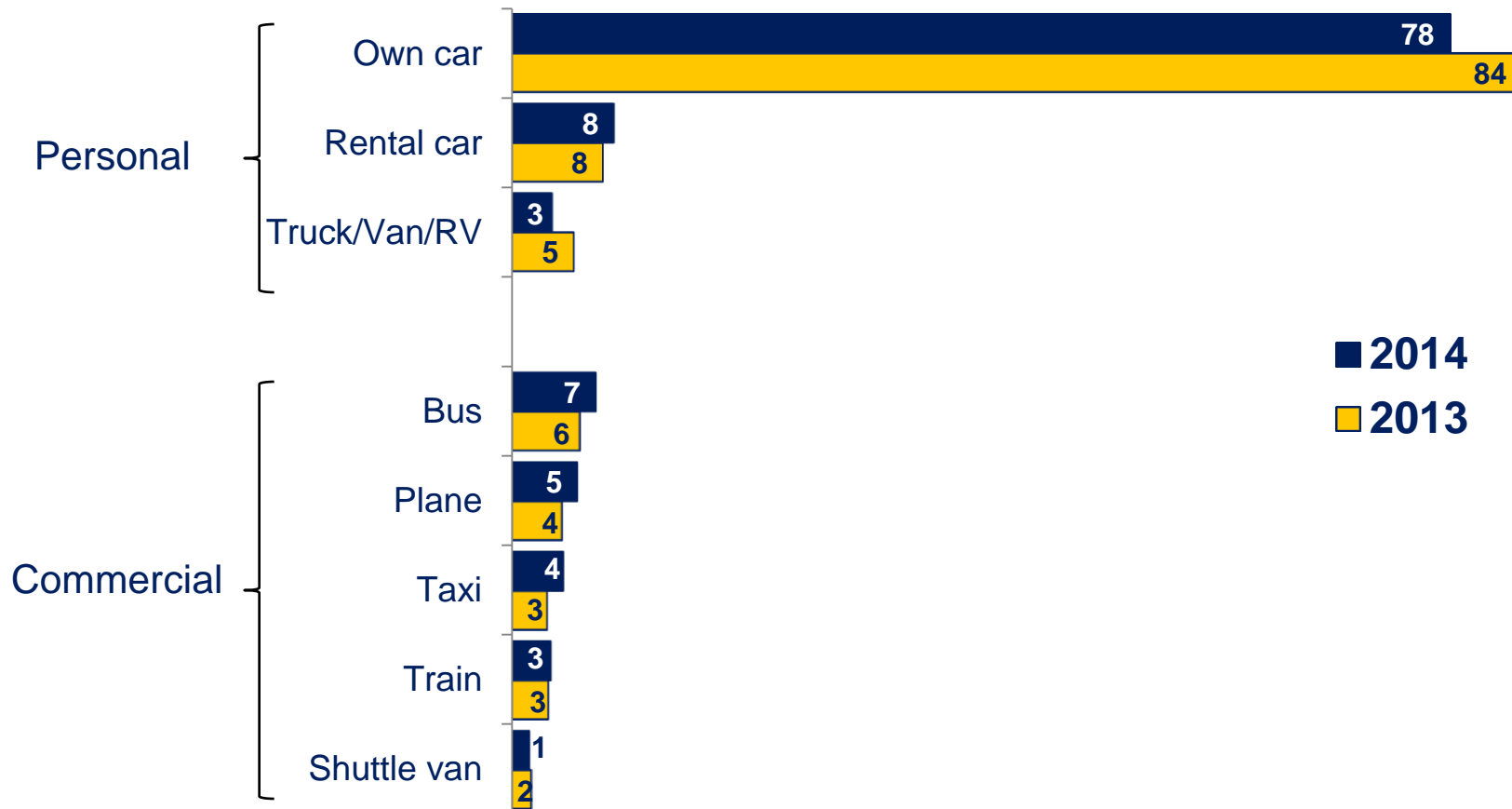


Transportation Used to Enter Pennsylvania



Base: Overnight Marketable Trips starting outside of Pennsylvania

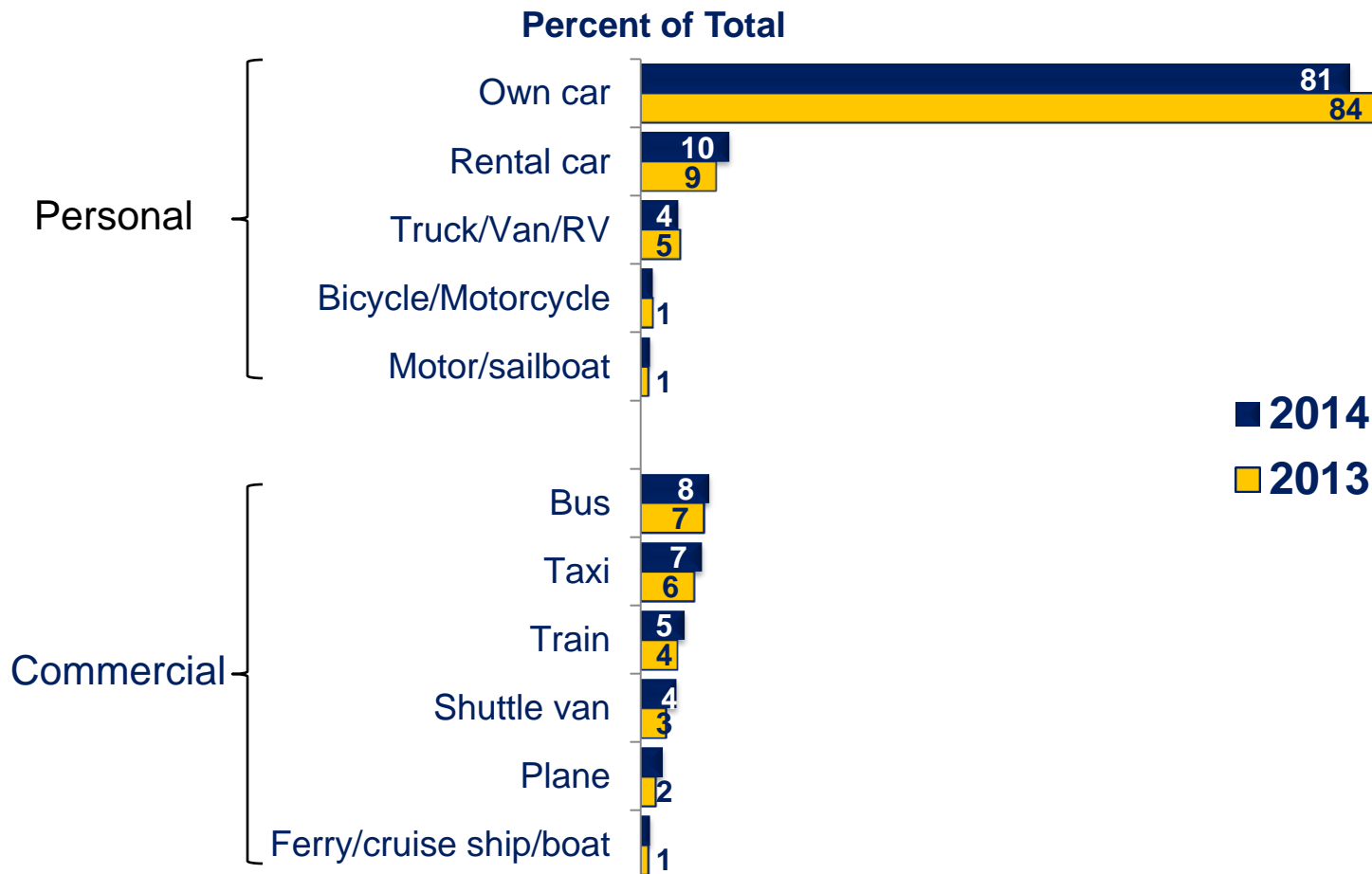
Percent of Total



Transportation Used Inside Pennsylvania



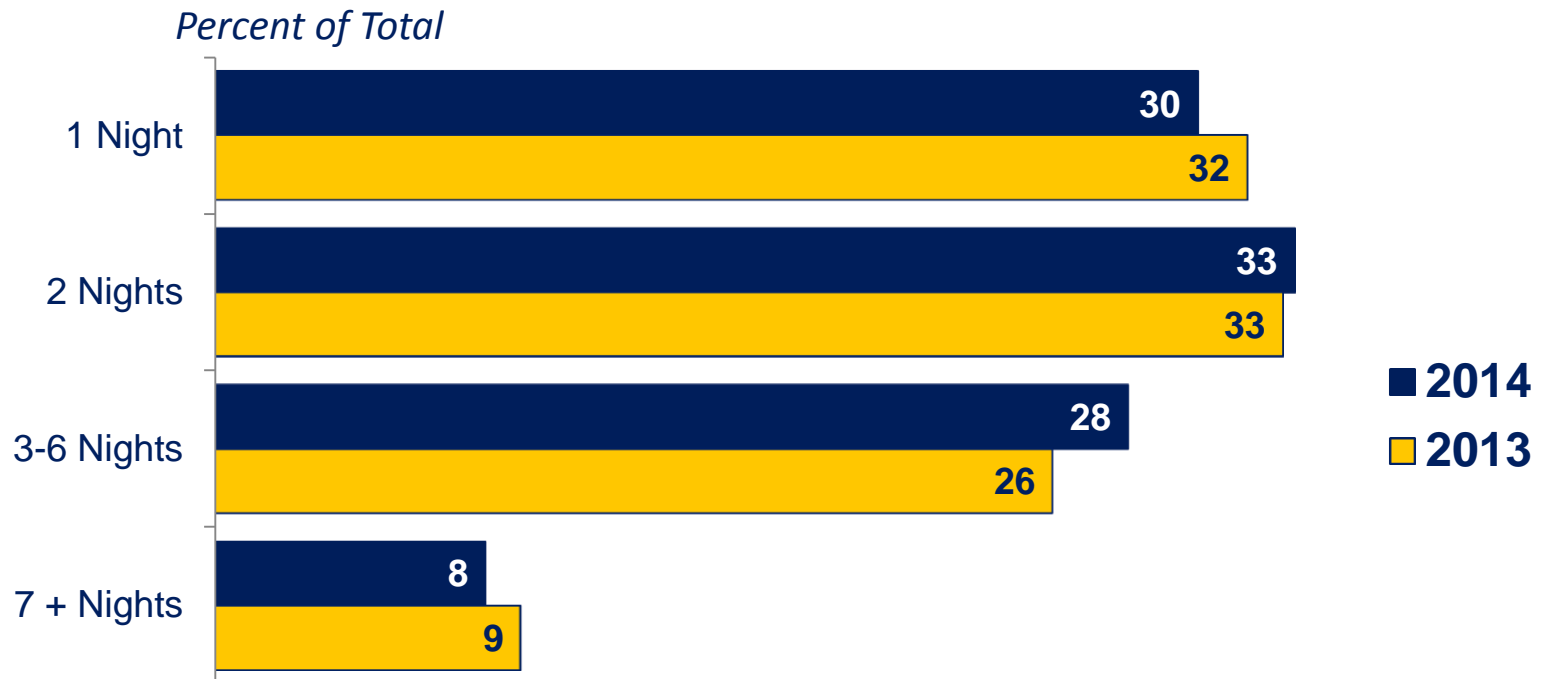
Base: Overnight Marketable Trips



Total Nights Away



Base: Overnight Marketable Trips

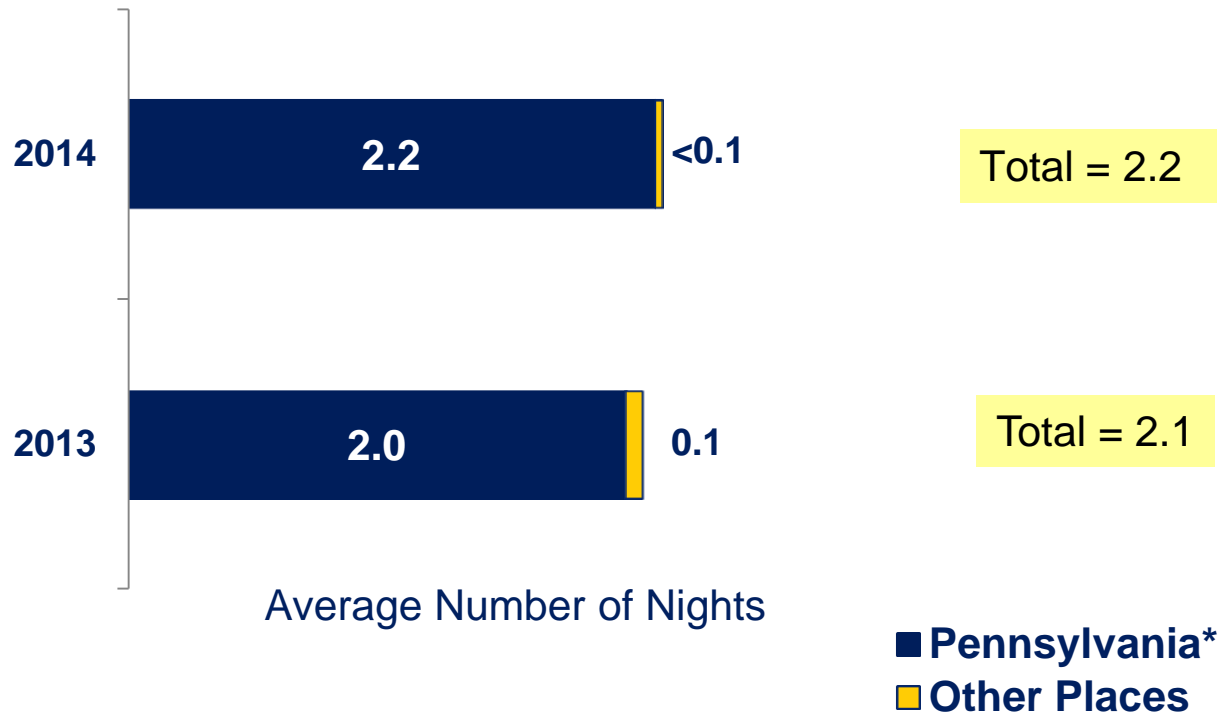


Average Number of Nights	<u>2014</u>	<u>2013</u>
	3.0	3.1

Length of Stay



Base: Overnight Marketable Trips



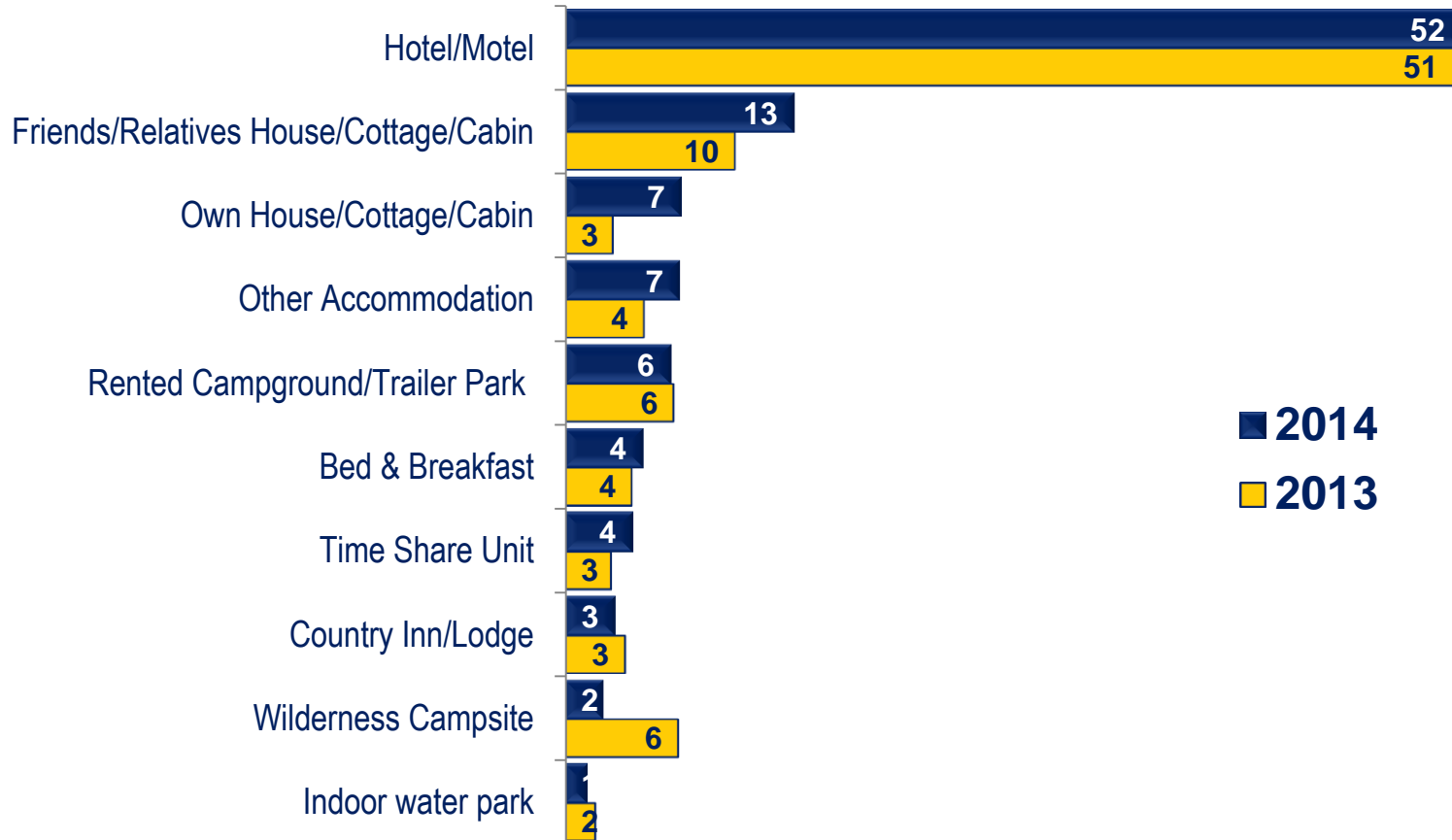
* Those who spent at least one night anywhere in Pennsylvania

Accommodations*



Base: Overnight Marketable Trips

Percent of Total



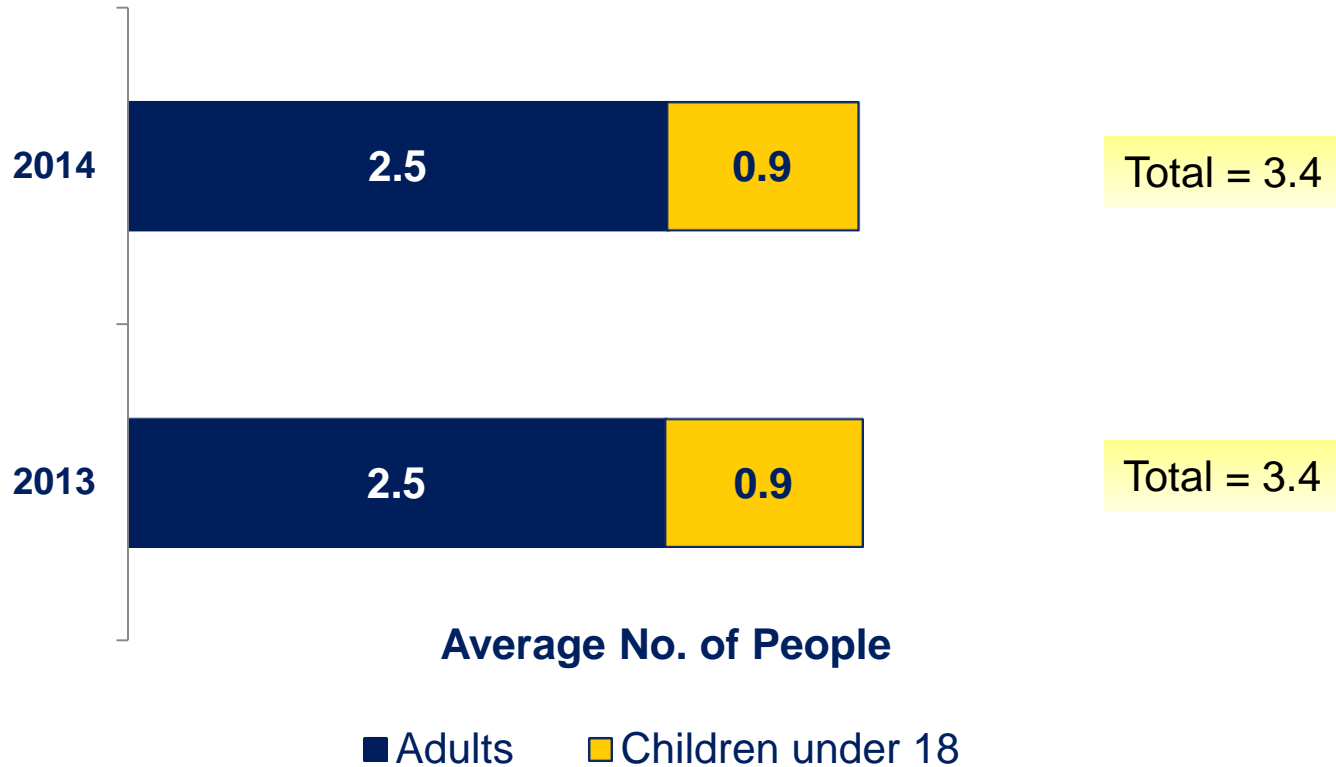
■ 2014
■ 2013

* Percent of trip nights spent in each type of accommodation

Size of Travel Party



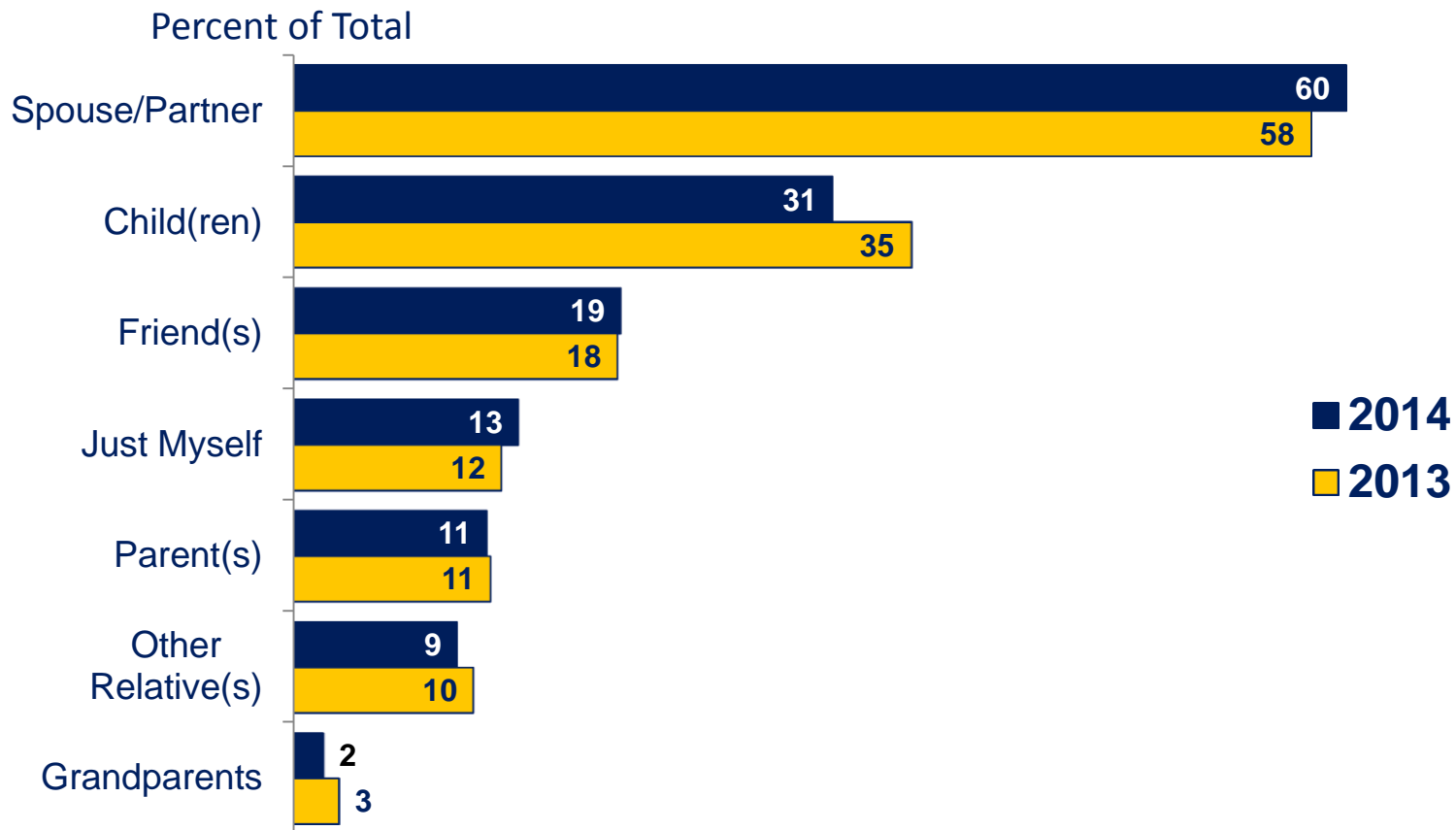
Base: Overnight Marketable Trips



Composition of Travel Party



Base: Overnight Marketable Trips

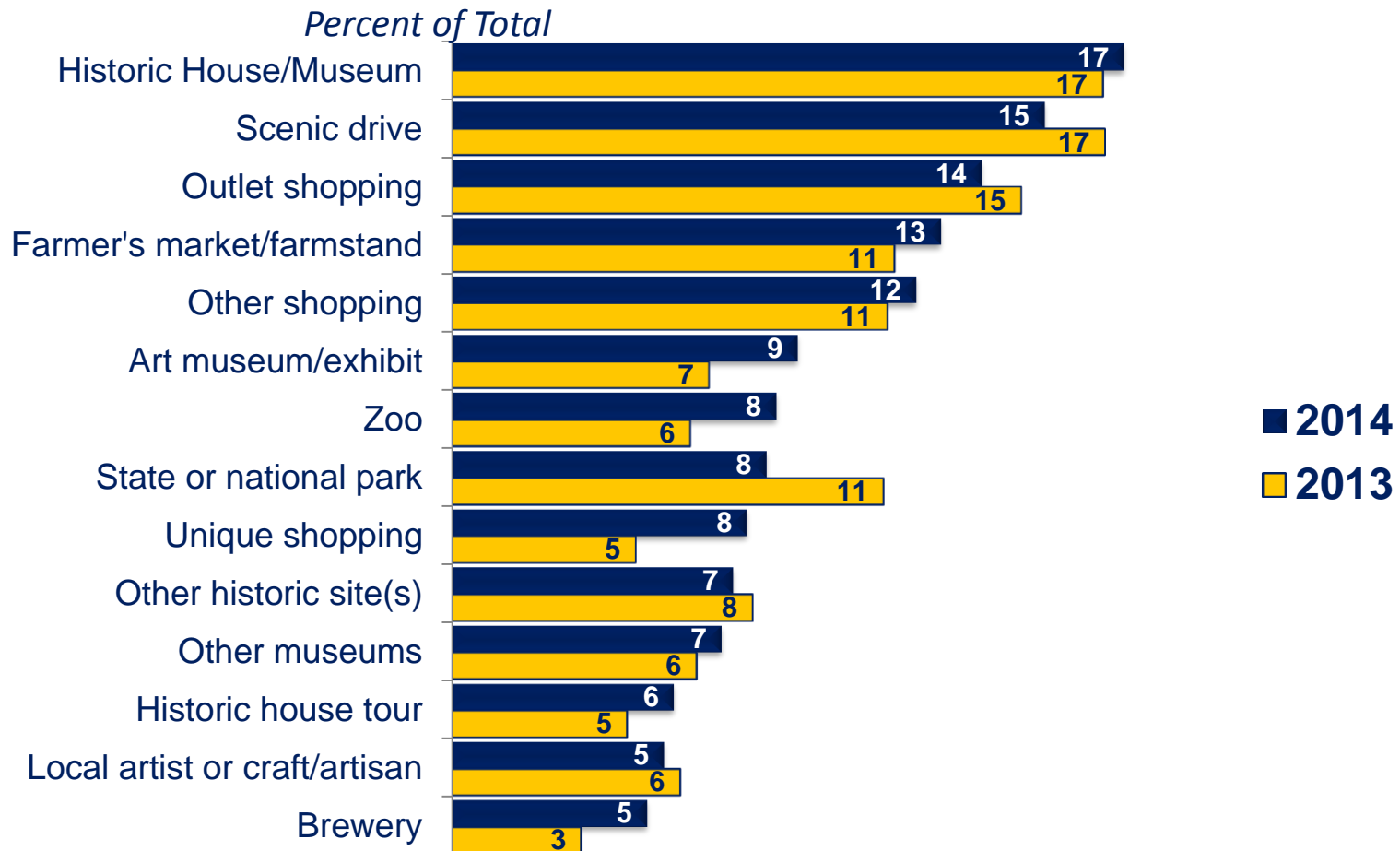


**Trip Experiences —
Overnight Marketable Trips**

Things Seen and Experienced on PA Trip



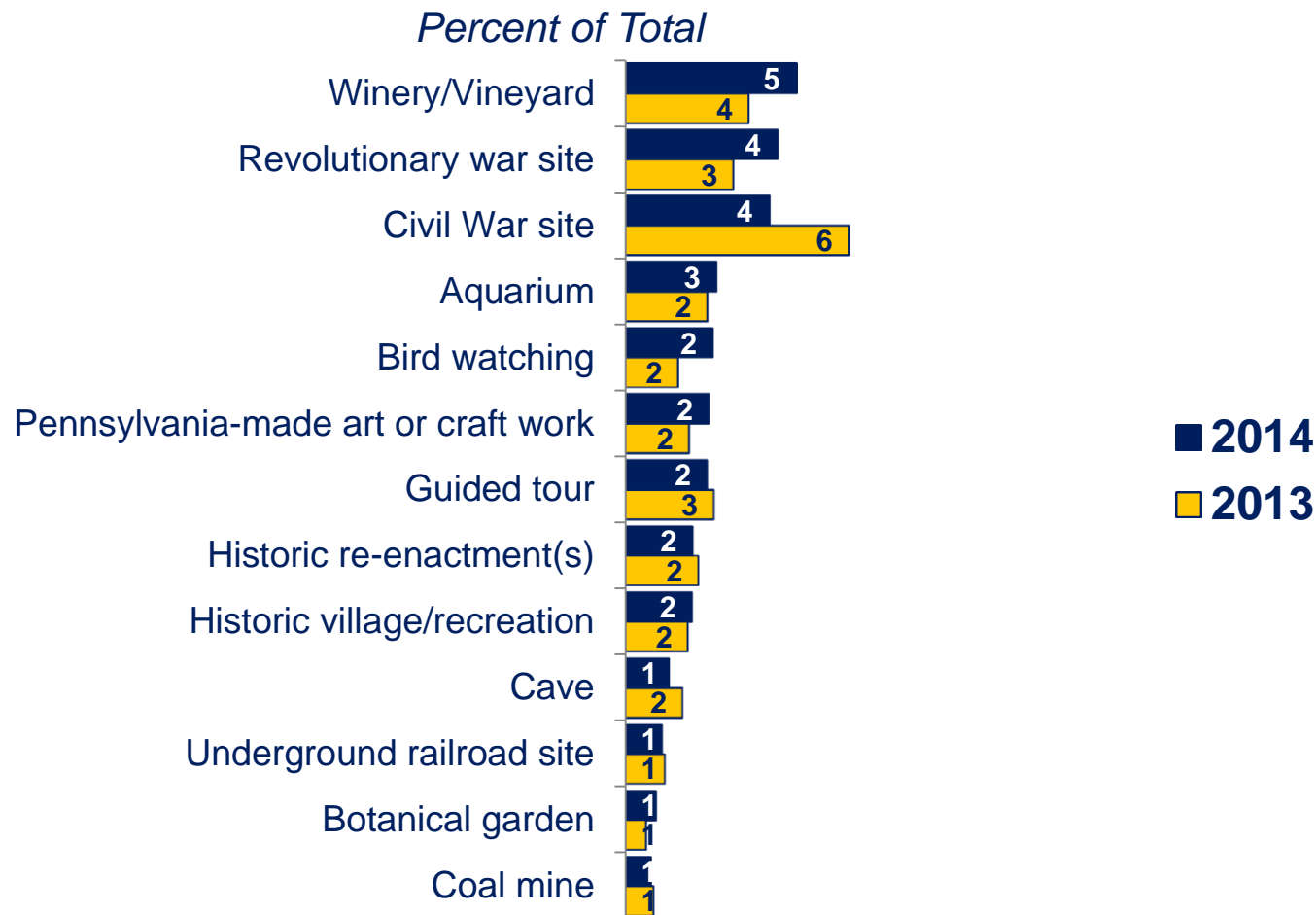
Base: Overnight Marketable Trips



Things Seen and Experienced on Trip (Cont'd)



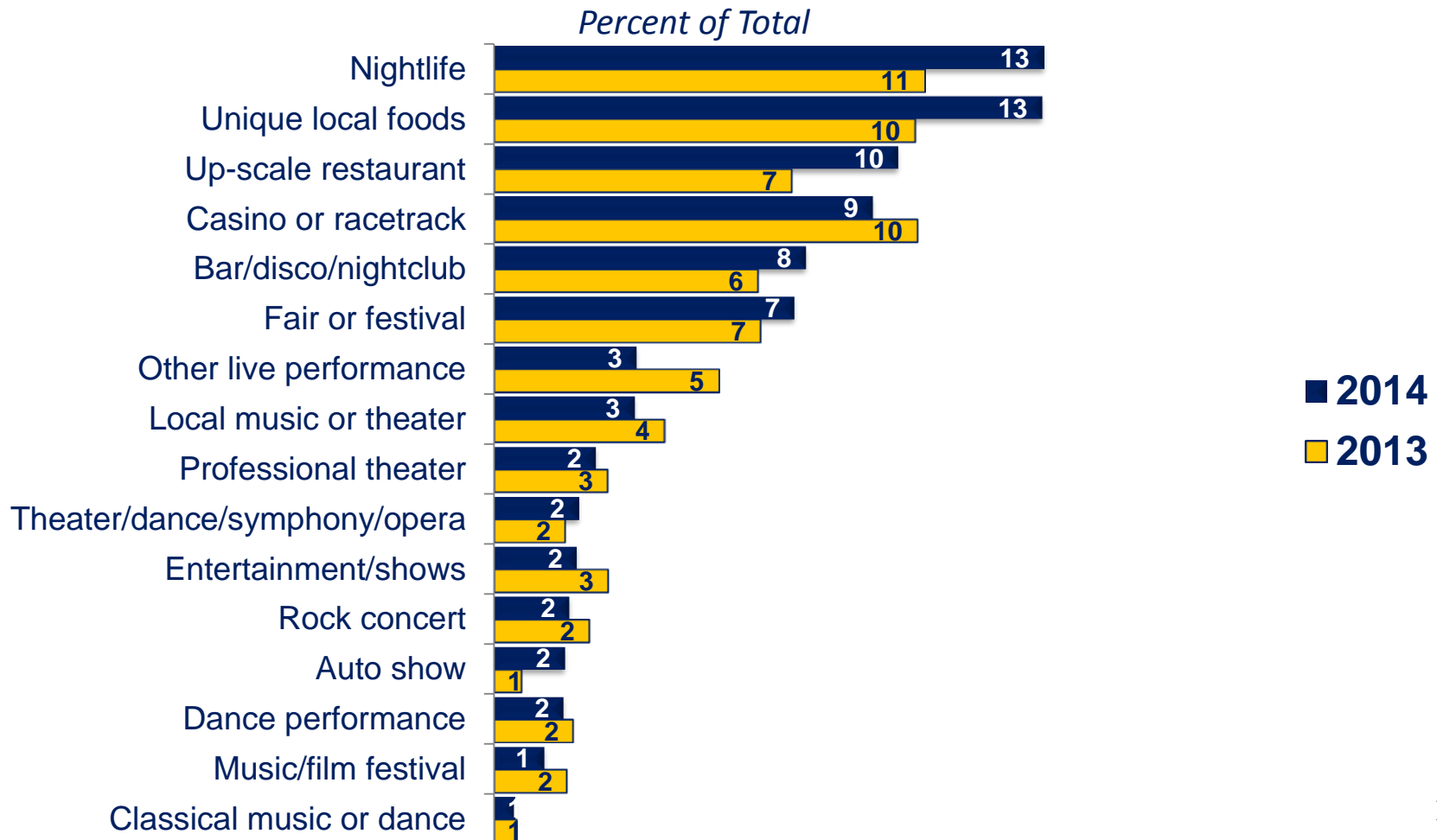
Base: Overnight Marketable Trips



Dining/Entertainment



Base: Overnight Marketable Trips

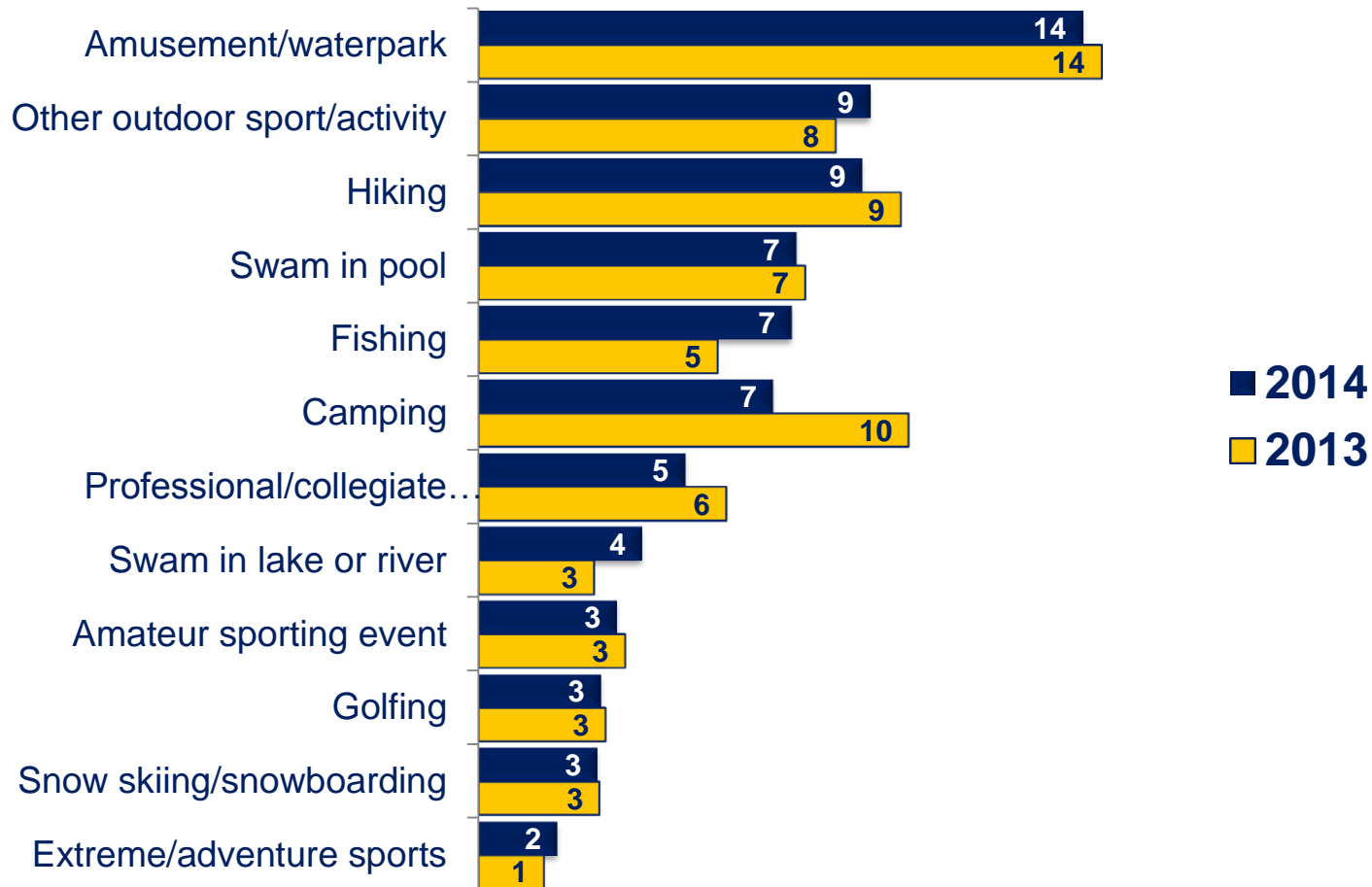


Sports and Recreation



Base: Overnight Marketable Trips

Percent of Total



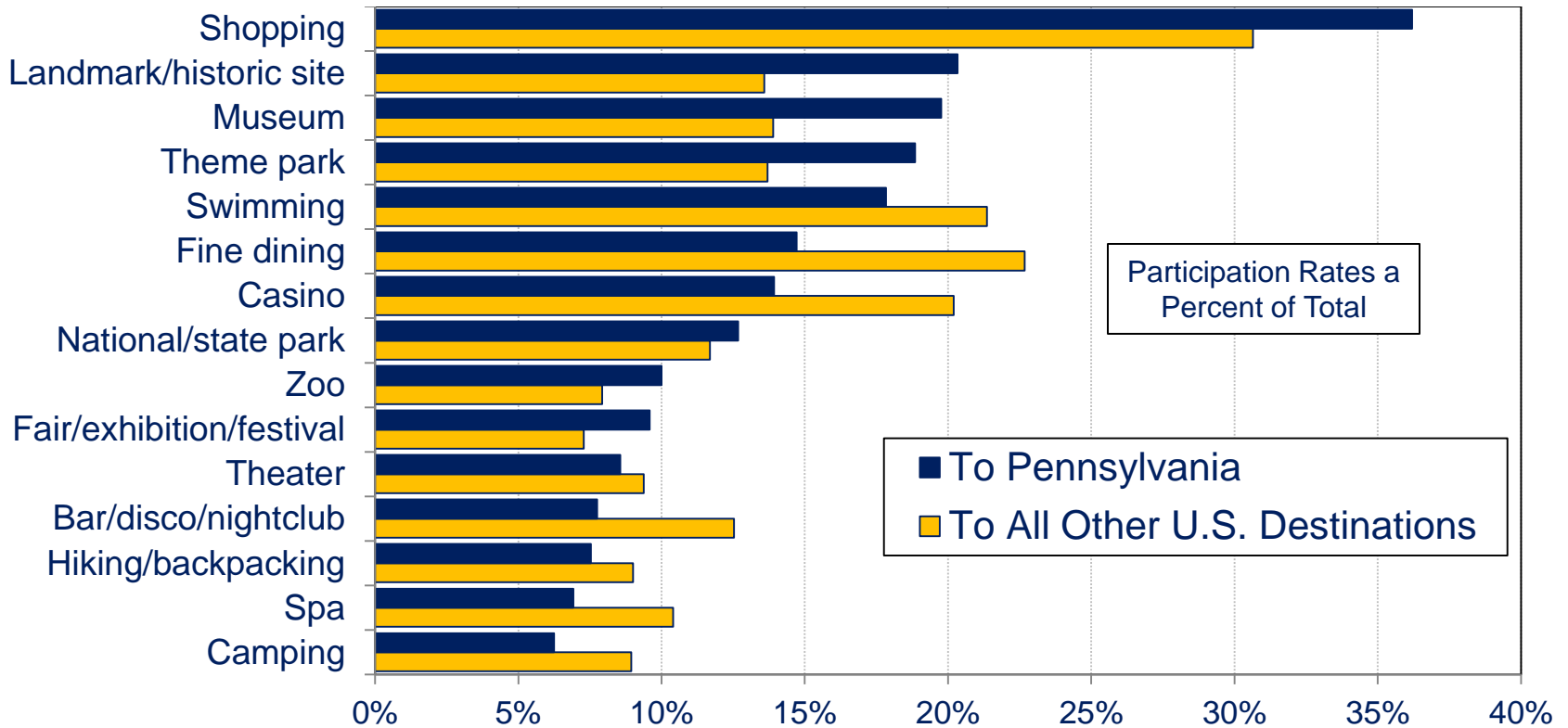
Activities by Origin Market of Marketable Overnight Travelers

Main Activities of New York Travelers Visiting PA vs. All Other U.S. Destinations



Base: Overnight Marketable Trips

Pennsylvania was a top destination for NY travelers interested in shopping, historic sites, museums and amusement parks, but less so for those interested in swimming, fine dining or casinos.

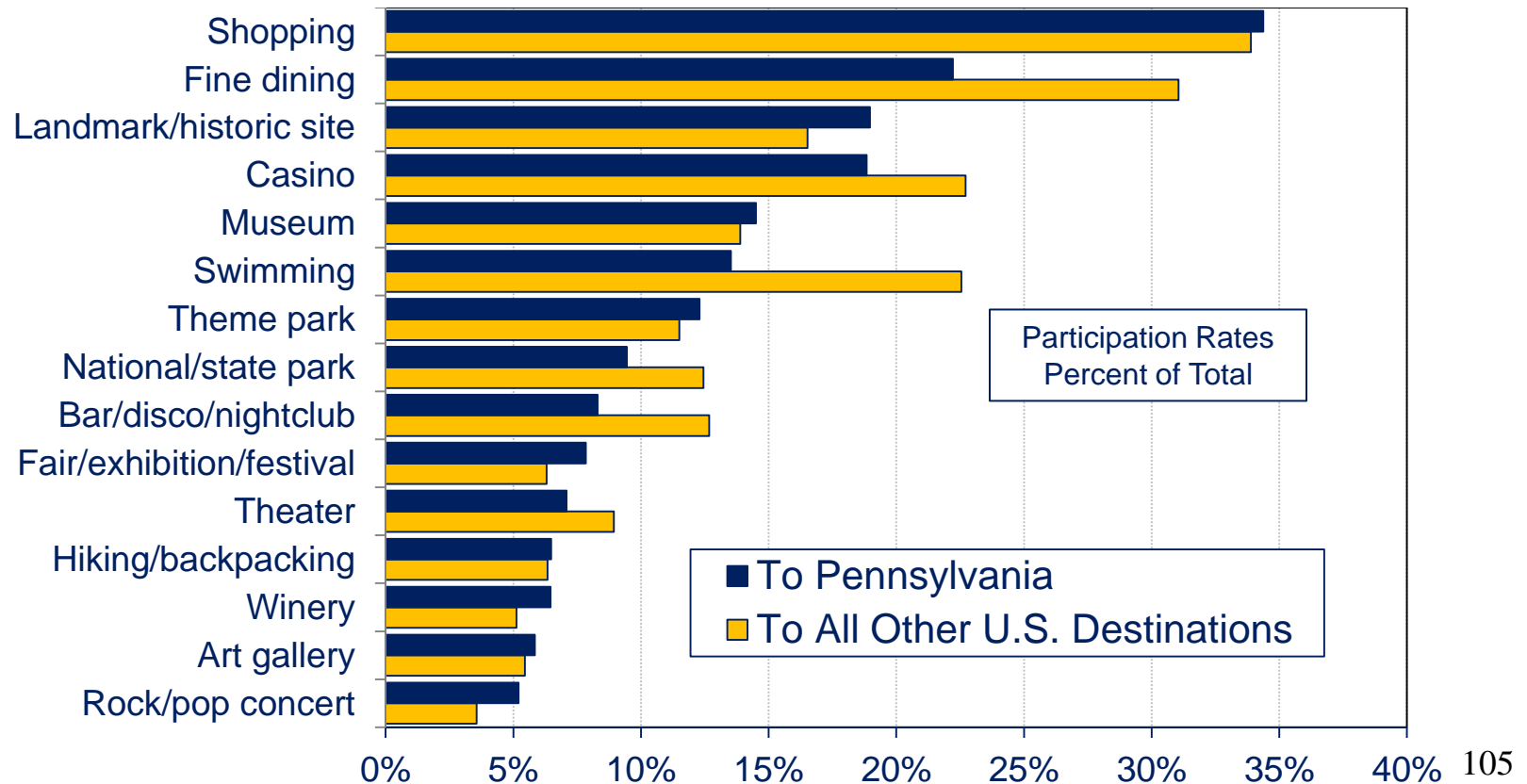


Main Activities of New Jersey Travelers Visiting PA vs. All Other U.S. Destinations



Base: Overnight Marketable Trips

Pennsylvania has a slight advantage over other U.S. destinations in attracting NJ travelers interested in shopping, historic sites, museums, theme parks, fairs/festivals, and wineries.

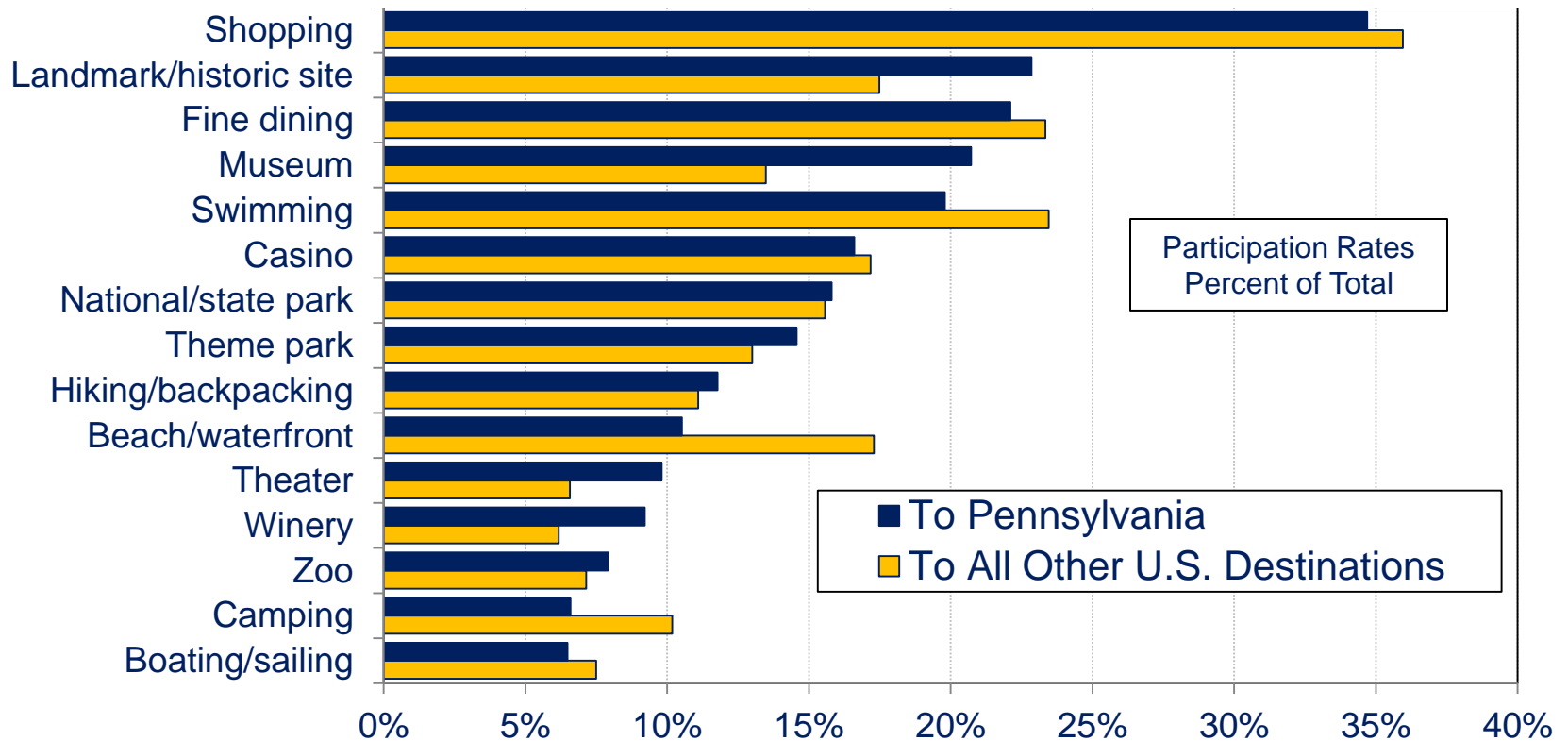


Main Activities of Ohio Travelers Visiting PA vs. All Other U.S. Destinations



Base: Overnight Marketable Trips

Pennsylvania has a clear advantage over other US destinations in attracting Ohio travelers interested in history and culture, especially for historic sites, museums, and the theater.

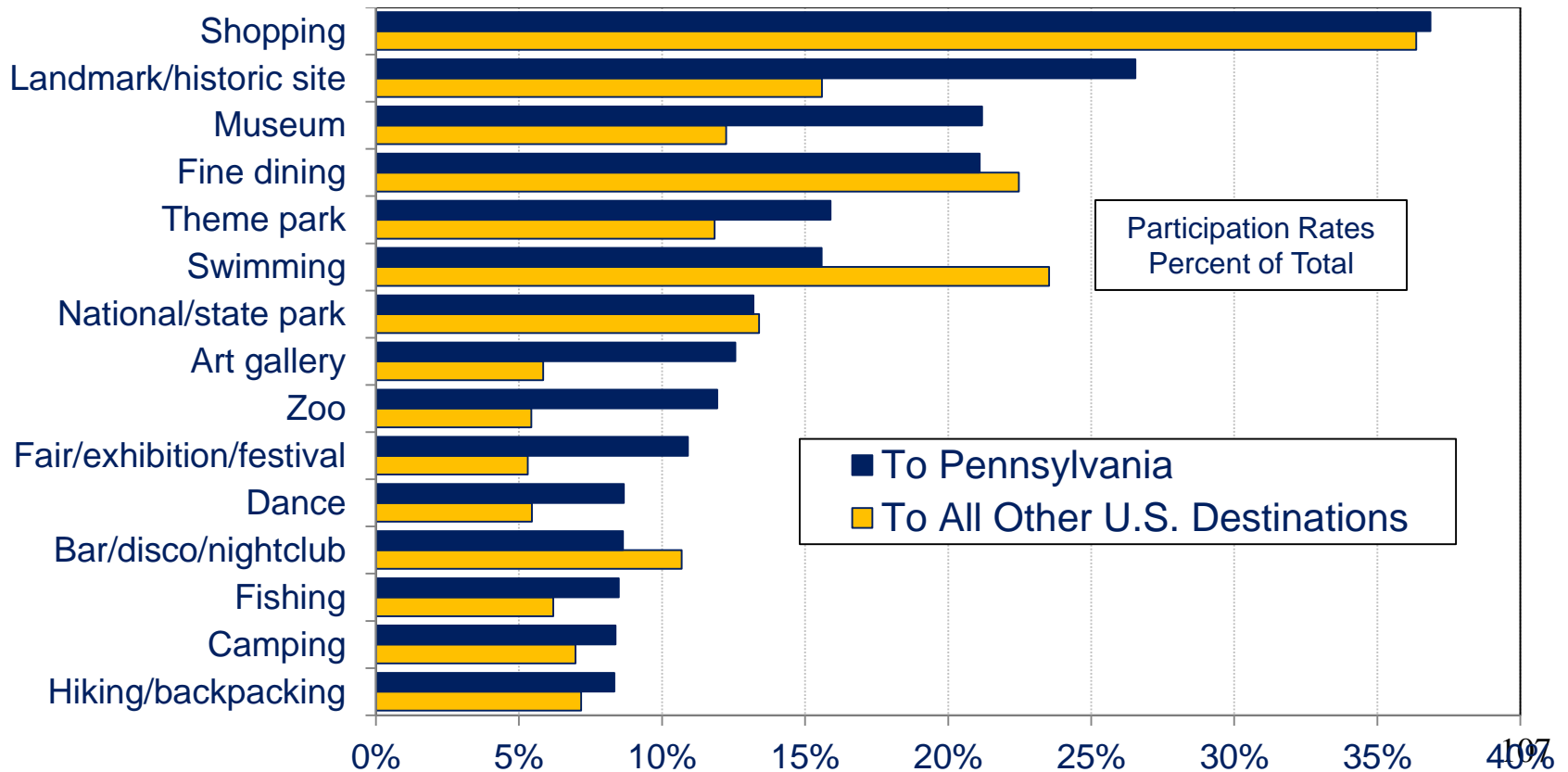


Main Activities of Maryland Travelers Visiting PA vs. All Other U.S. Destinations



Base: Overnight Marketable Trips

Pennsylvania has a clear advantage over other U.S. destinations in attracting MD travelers interested in historic sites, museums, theme parks, art galleries, and many outdoor activities.

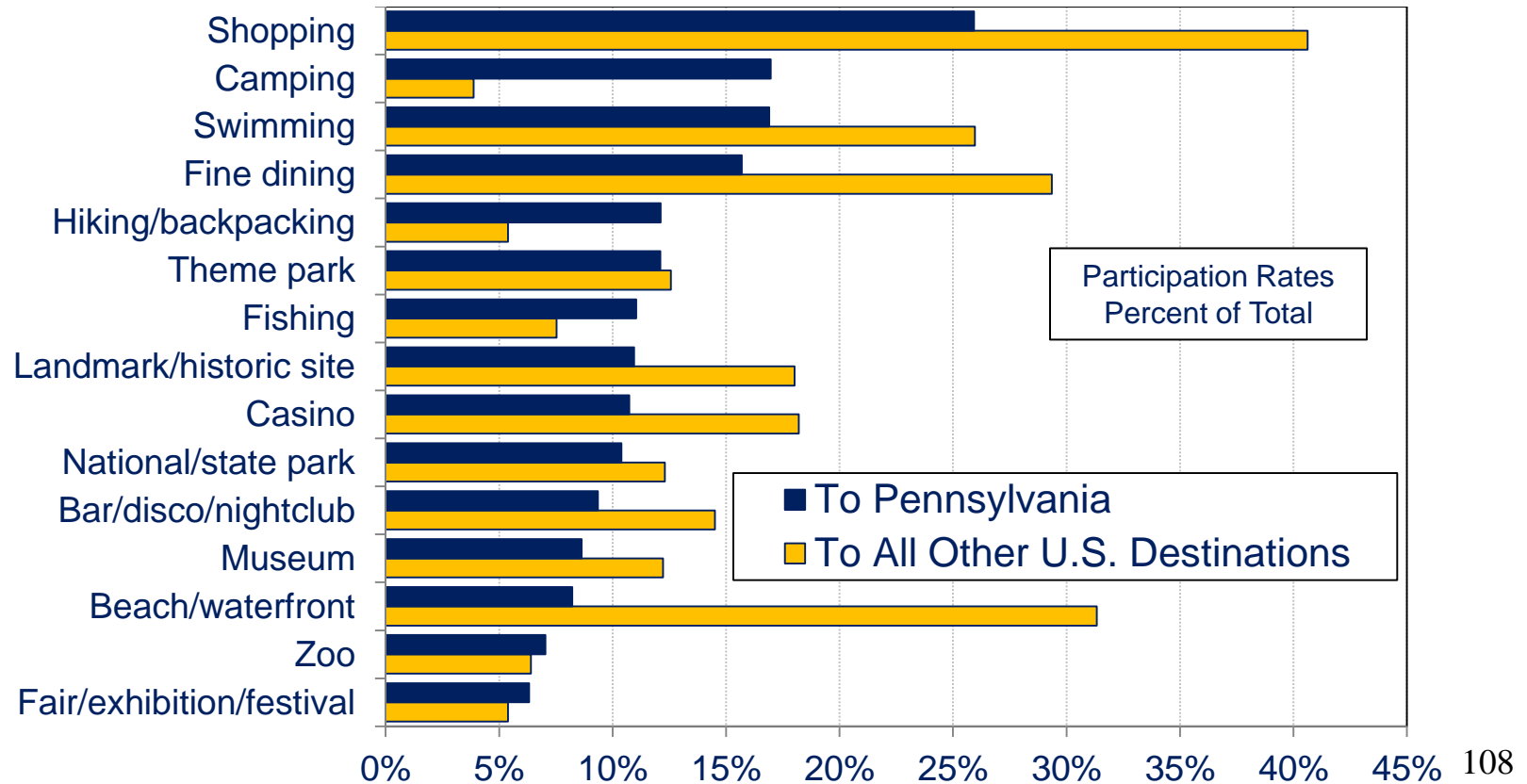


Main Activities of Pennsylvania Travelers Visiting PA vs. All Other U.S. Destinations



Base: Overnight Marketable Trips

Pennsylvania's outdoor recreational opportunities, i.e., camping, hiking/backpacking, and fishing are a big draw for the state's resident travelers relative to other destinations.



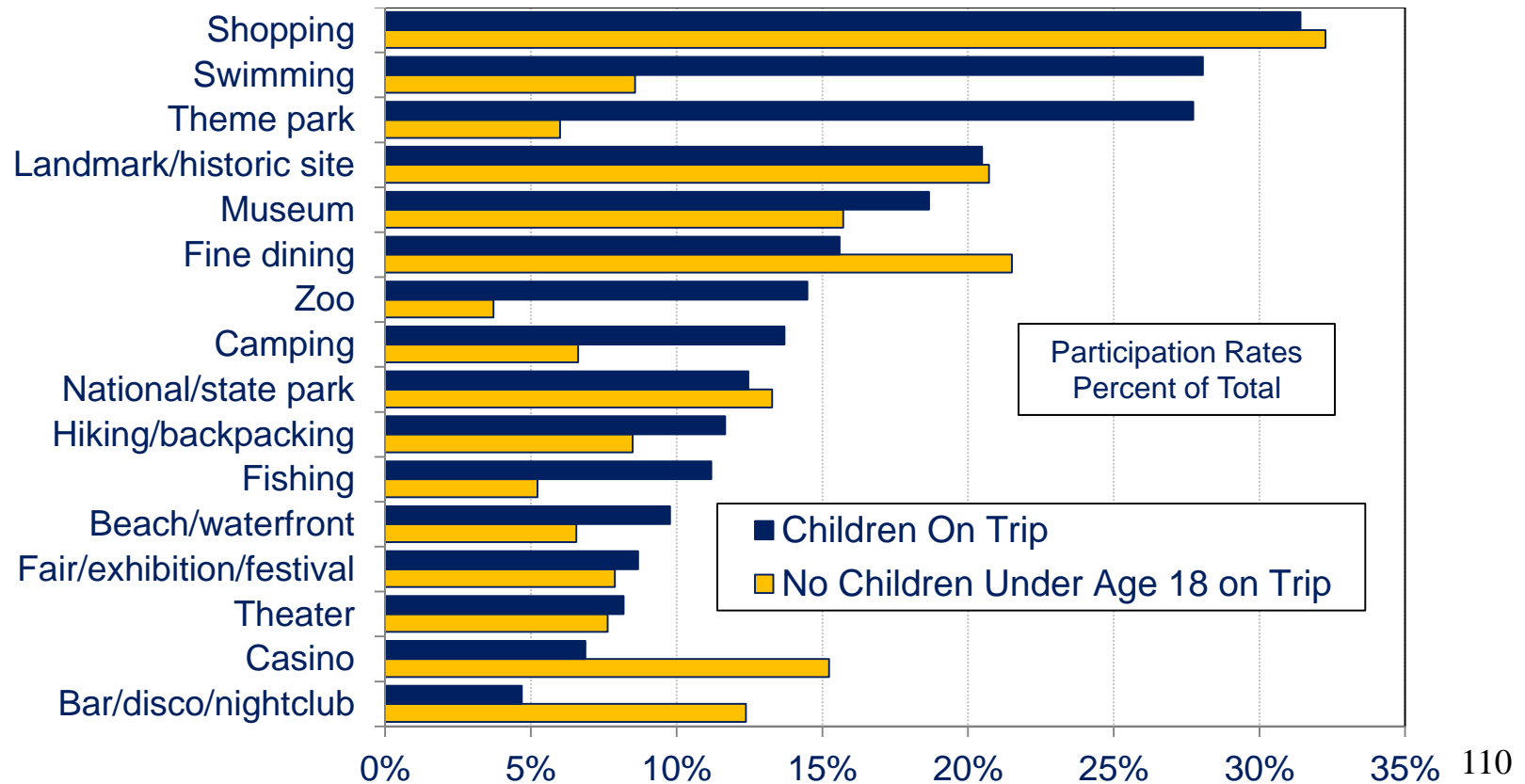
**Comparison of
Main Activities of Marketable Overnight Travelers
According to Traveler's Age
and Presence of Children on Trip**

Comparison of Activity Levels for Travelers With and Without Children on PA Trip



Base: Overnight Marketable Trips

Travelers with children are far more likely to visit a theme park or participate in outdoor activities than those without children, who are more likely to enjoy fine dining experiences and casinos.

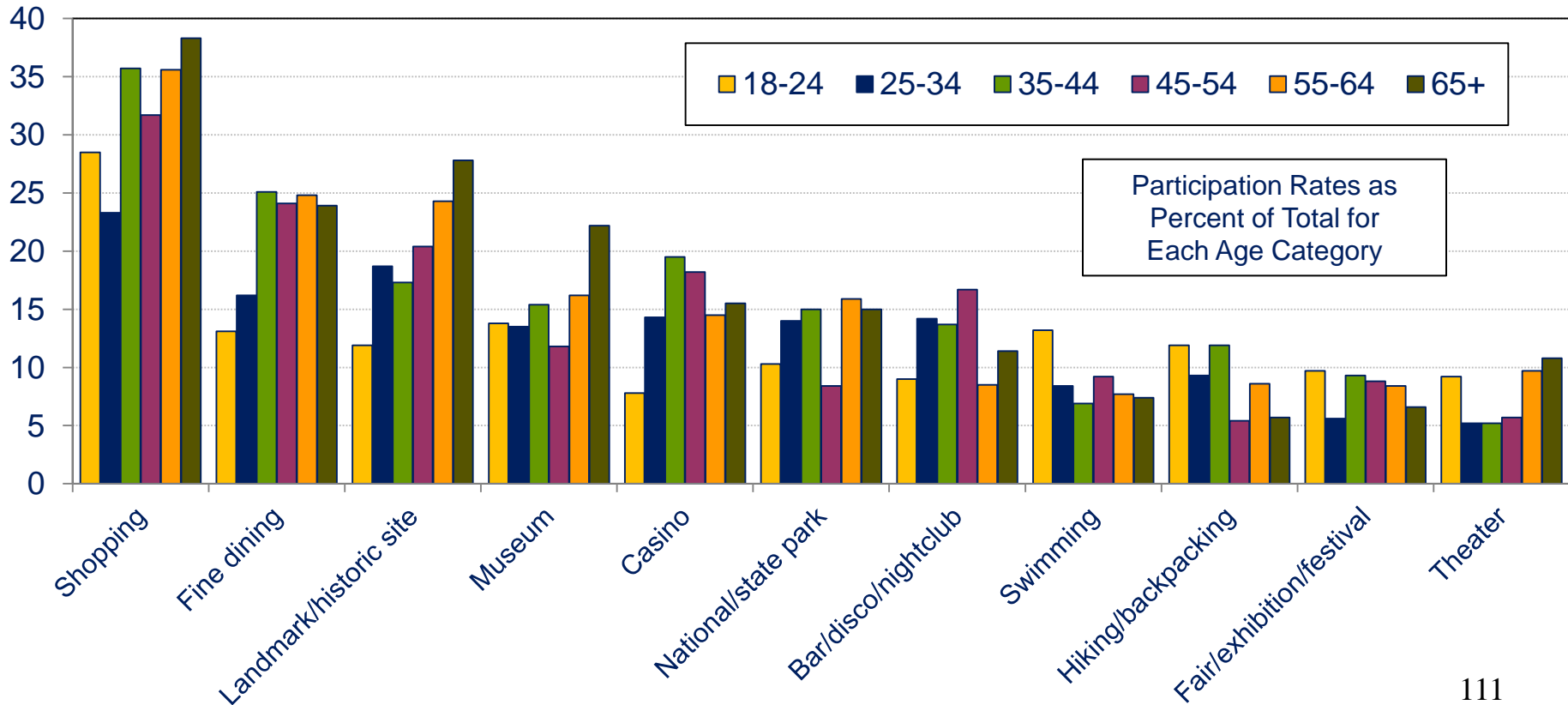


Main Activities - Travelers With No Children on Trip, By Age of Adult Traveler



Base: Overnight Marketable Trips

Older PA travelers without children along on the trip were more likely to shop and visit historic sites and museums than middle-age and younger travelers.

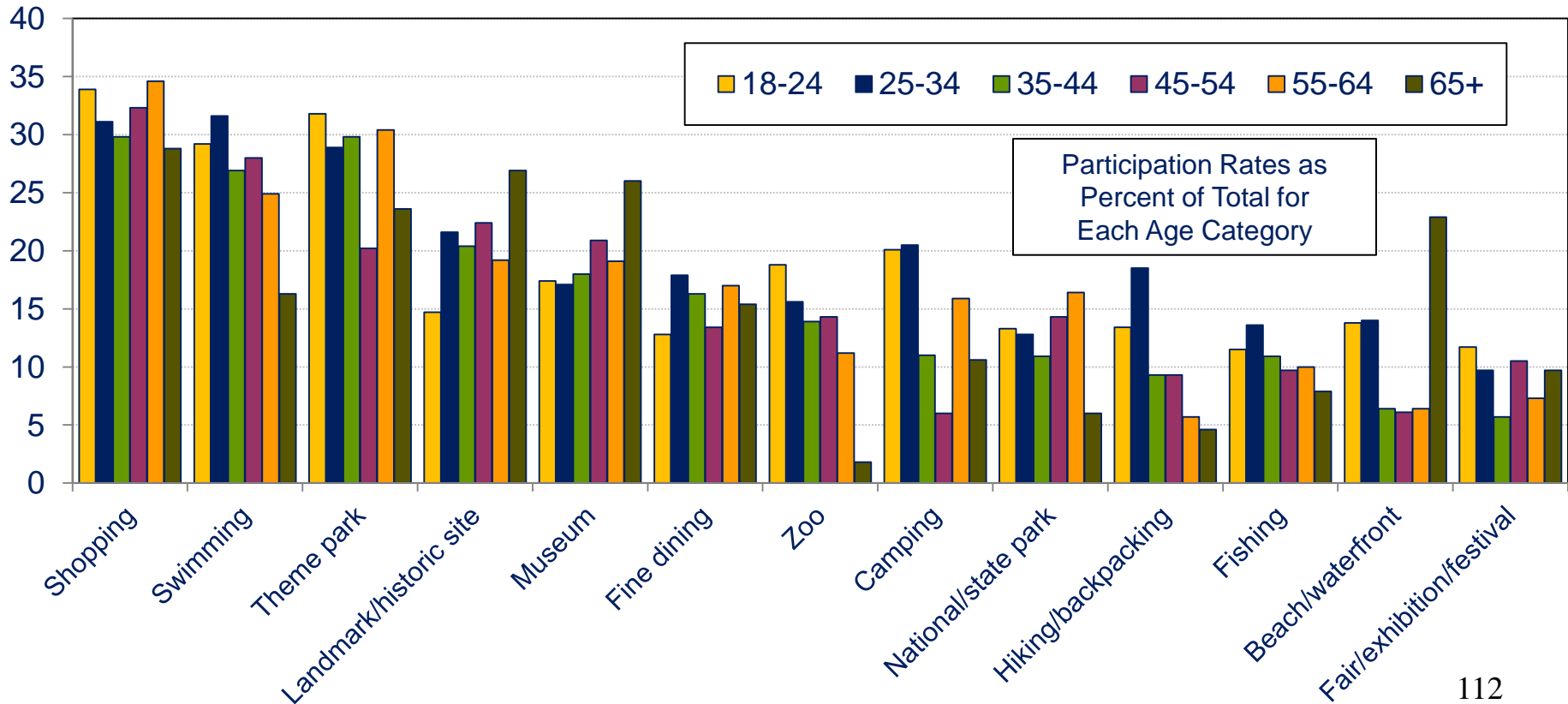


Main Activities - Travelers With Children on Trip, By Age of Adult Traveler



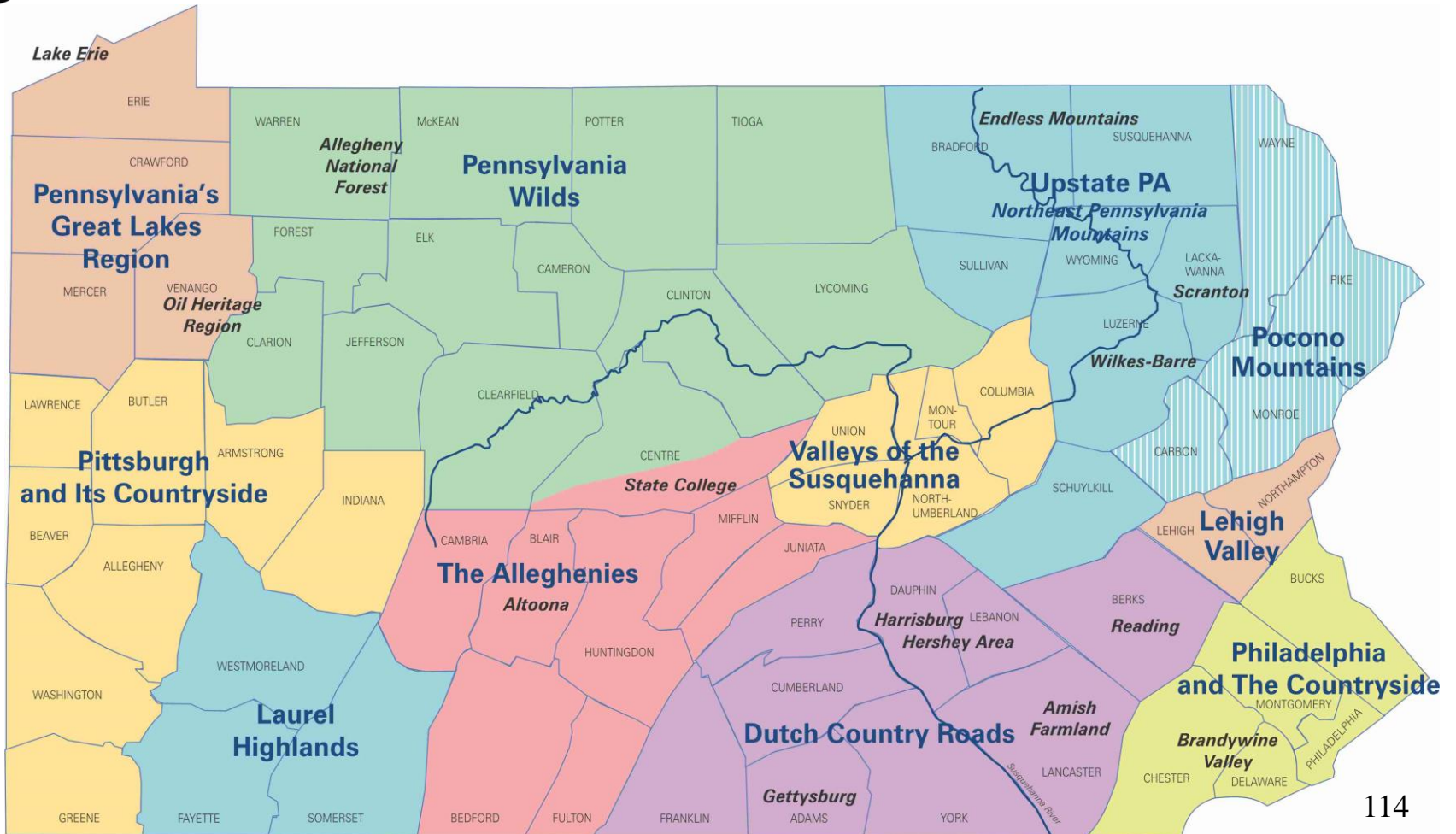
Base: Overnight Marketable Trips

Older travelers with children on the trip are more likely to visit museums and historic sites, while younger travelers are more likely to take them camping and other outdoor activities.



Regional Attractions Visited 2014 Marketable Overnight Trips

Pennsylvania Regional Map

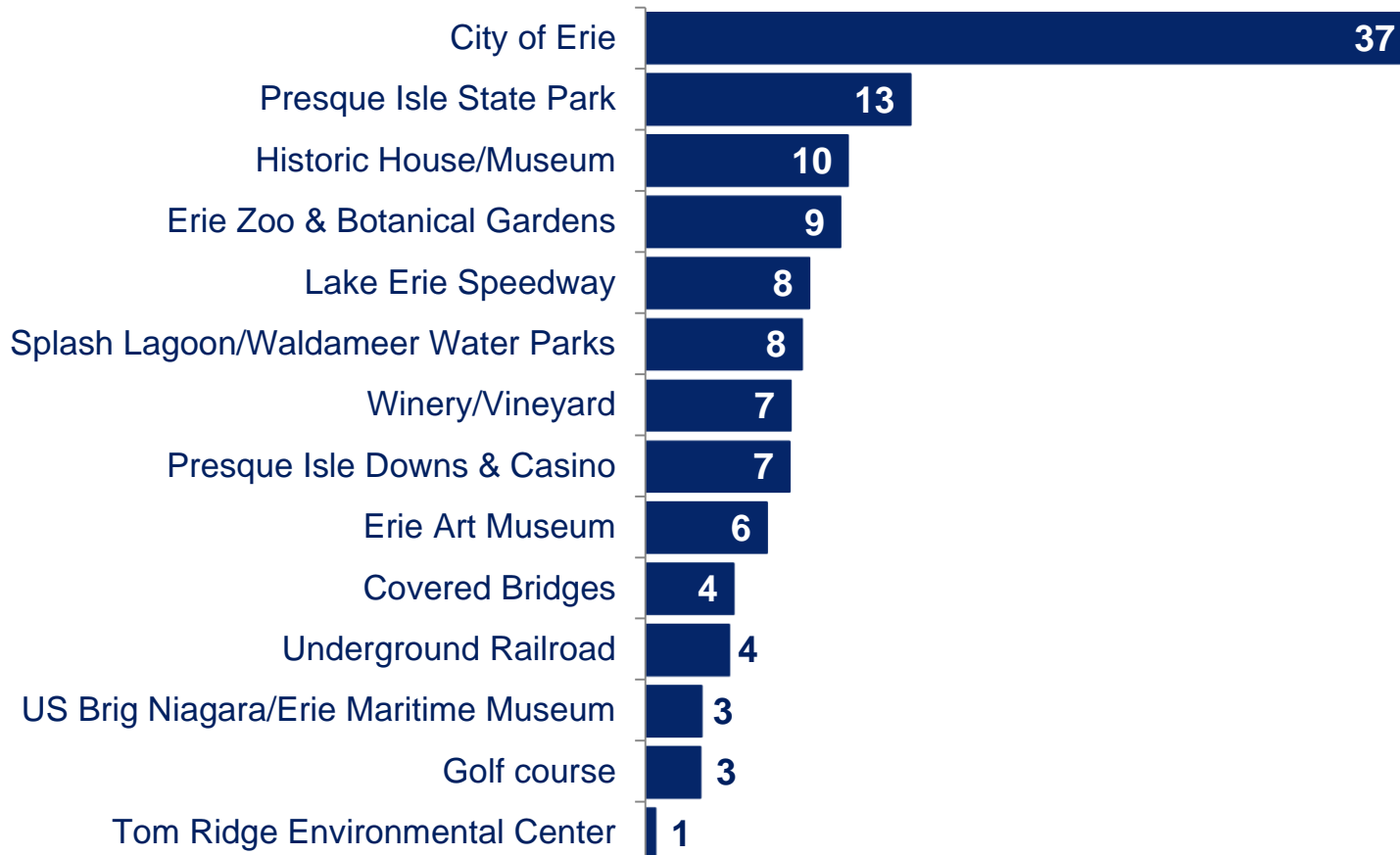


Pennsylvania Attractions/Events — Pennsylvania's Great Lakes Region*



Base: Overnight Trips

Percent of Total



*Erie Region

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



Base: Overnight Trips

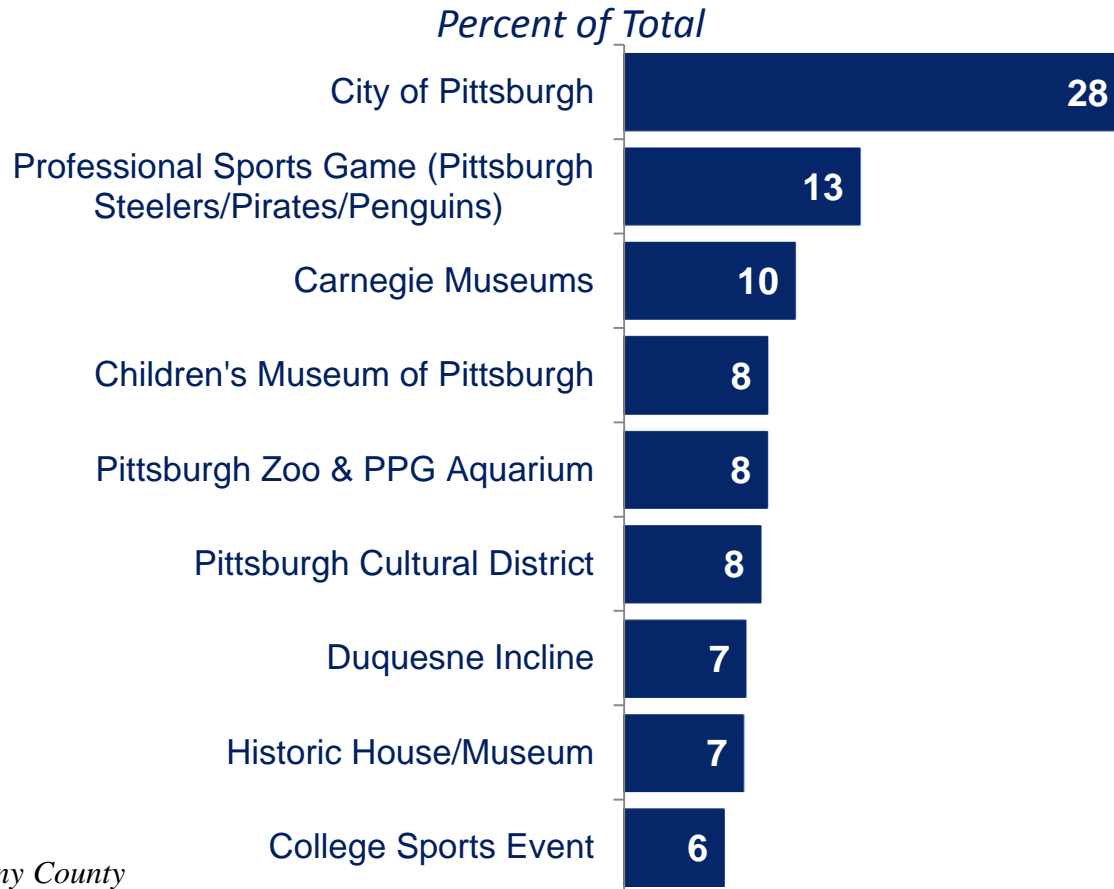


*Remainder of Region

Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



Base: Overnight Marketable Trips

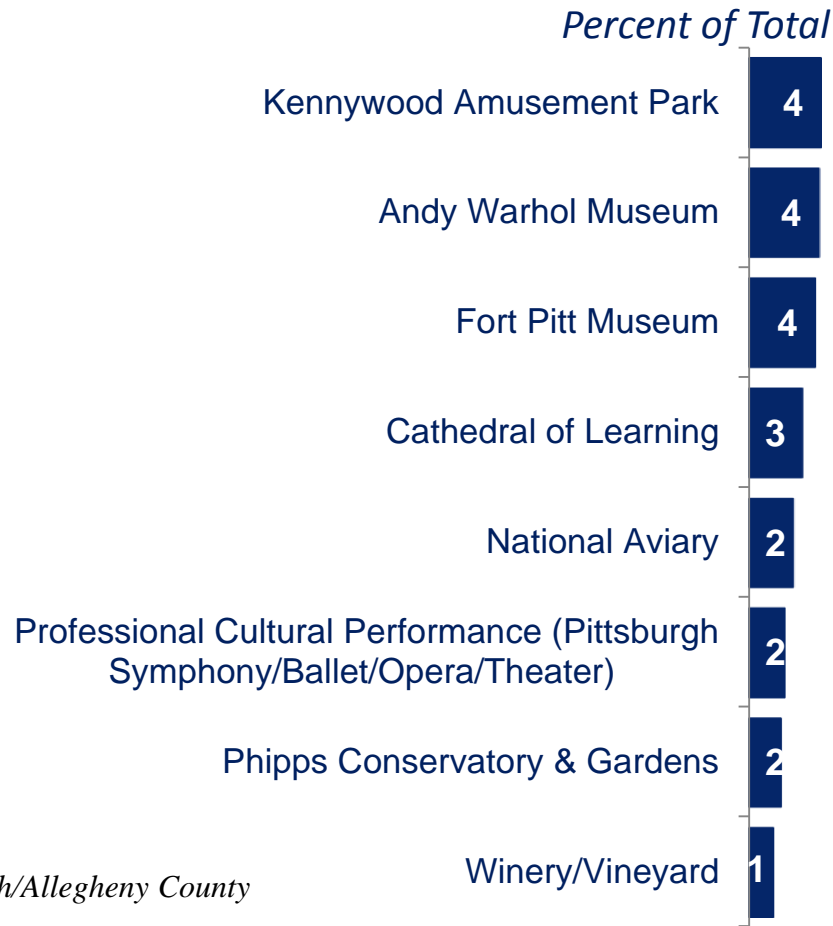


*Pittsburgh/Allegheny County

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



Base: Overnight Marketable Trips



*Pittsburgh/Allegheny County

Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*



Base: Overnight Marketable Trips

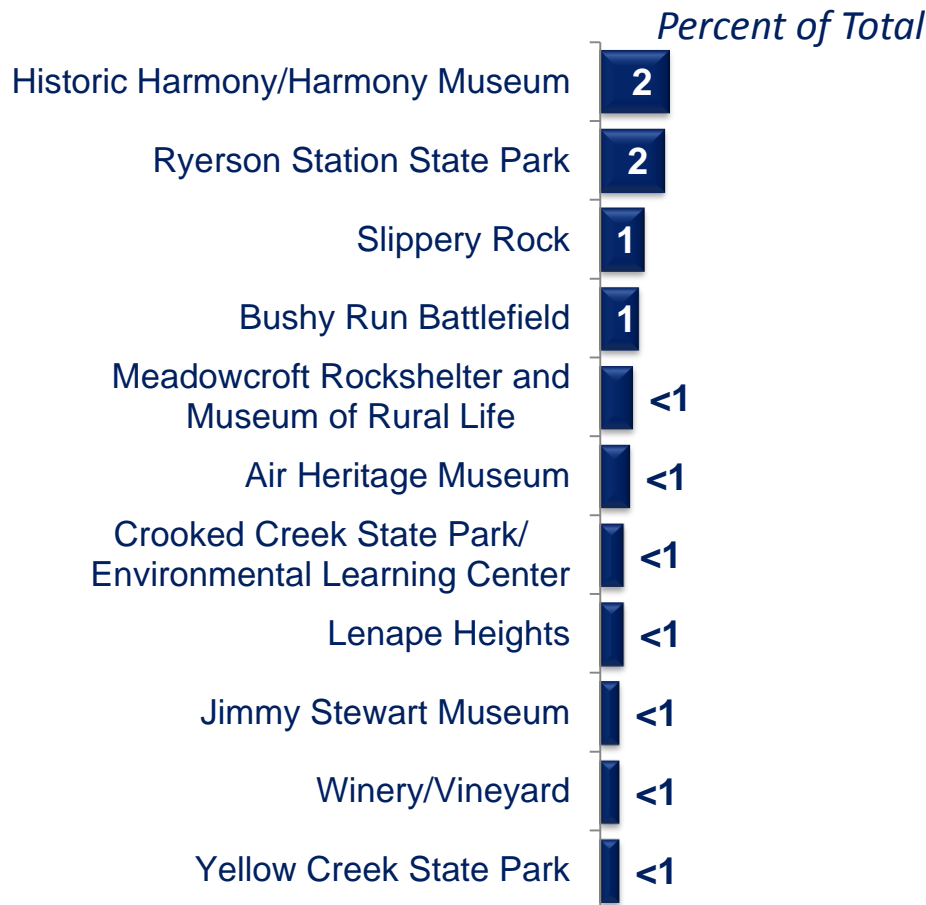


**Remainder of Region*

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



Base: Overnight Marketable Trips

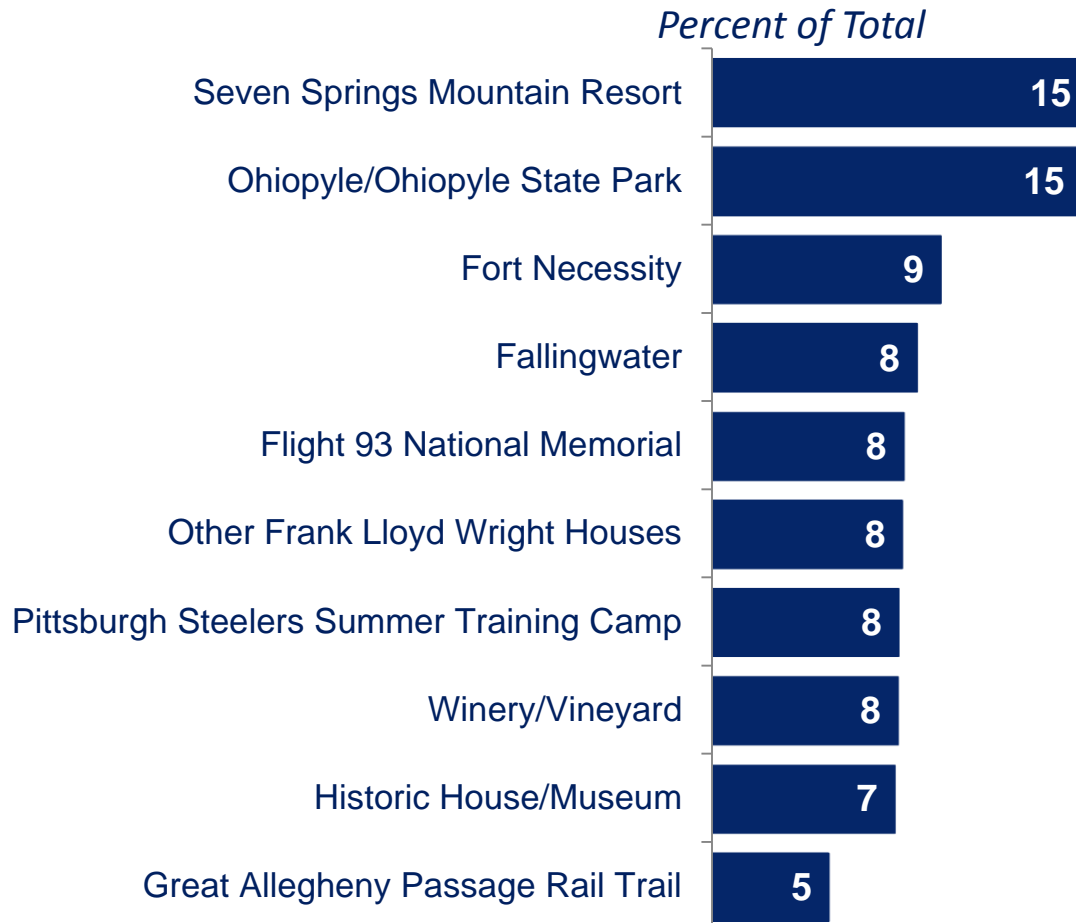


**Remainder of Region*

Pennsylvania Attractions/Events — Laurel Highlands Region



Base: Overnight Trips



Pennsylvania Attractions/Events — Laurel Highlands Region (cont'd)



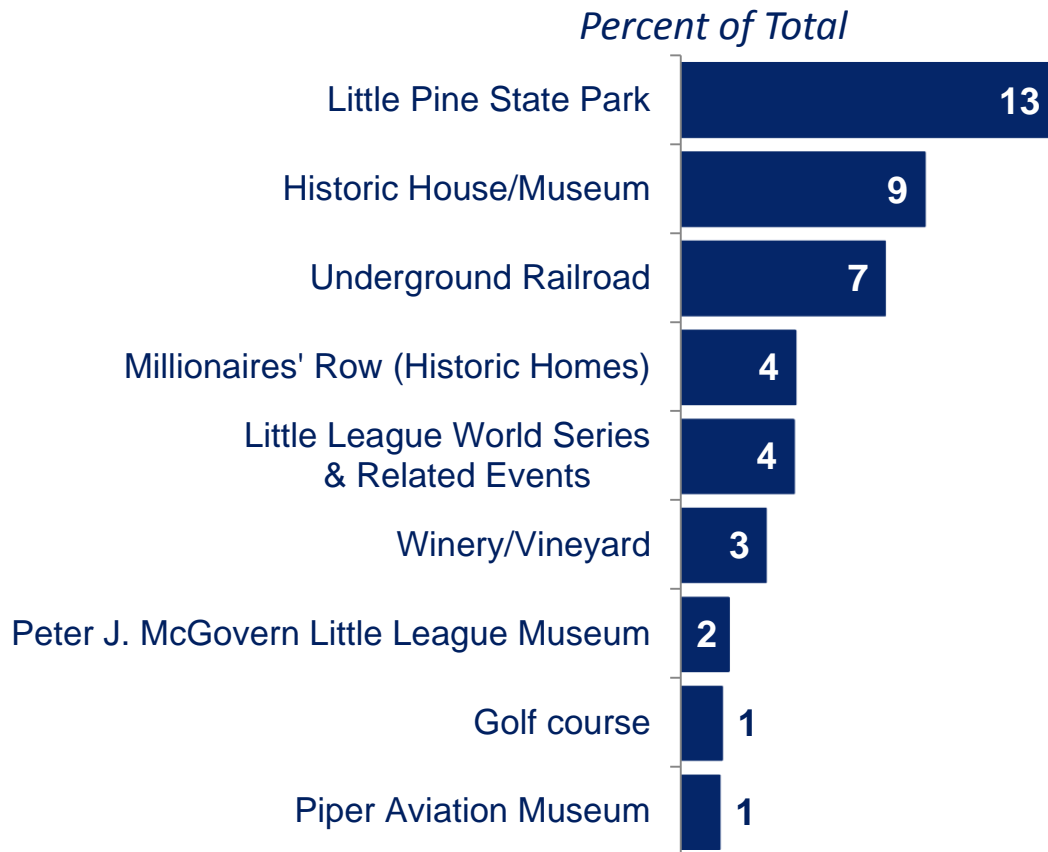
Base: Overnight Trips



Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



Base: Overnight Trips

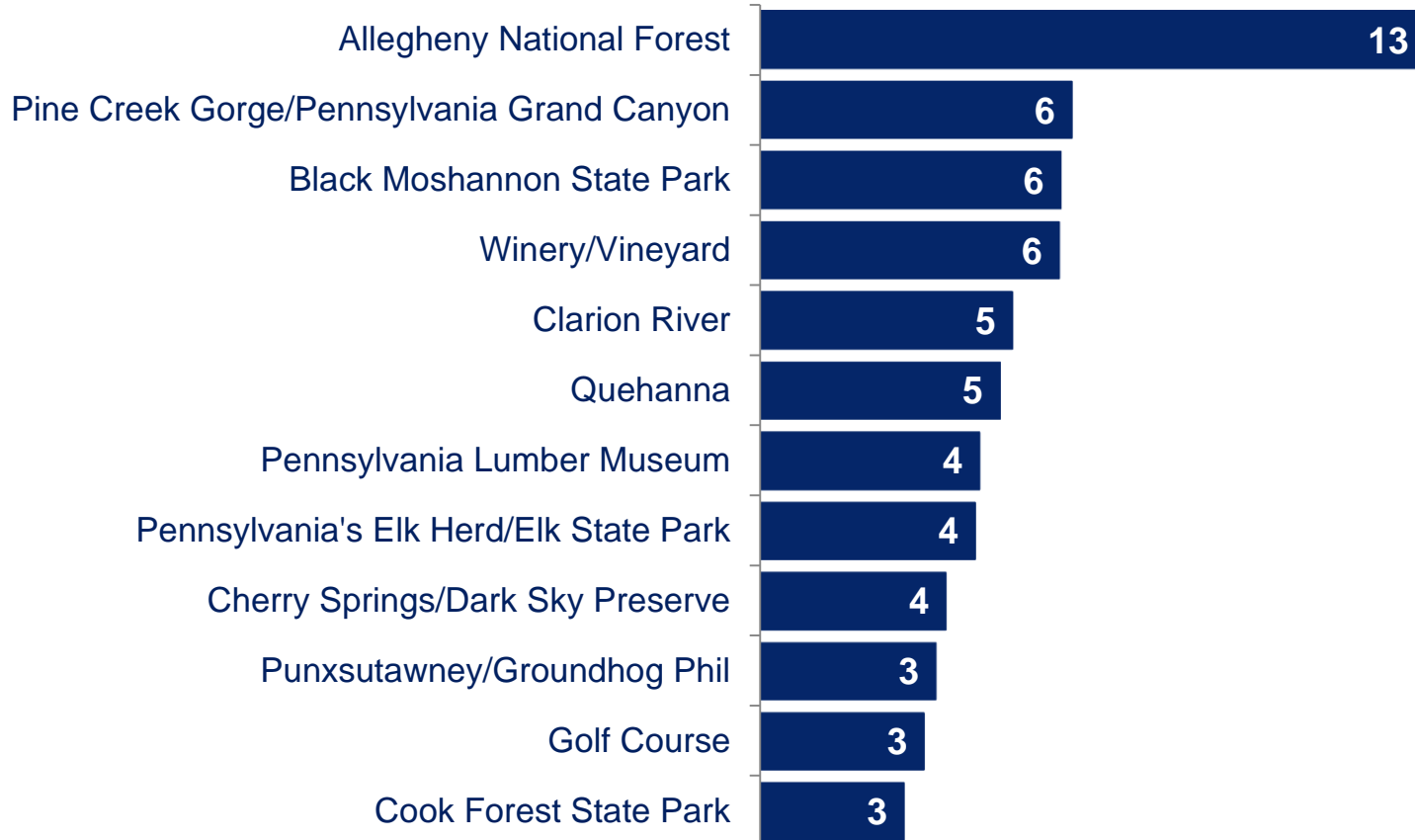


Pennsylvania Attractions/Events — Pennsylvania Wilds Region*



Base: Overnight Trips

Percent of Total



**Remainder of Region*

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



Base: Overnight Trips

Percent of Total



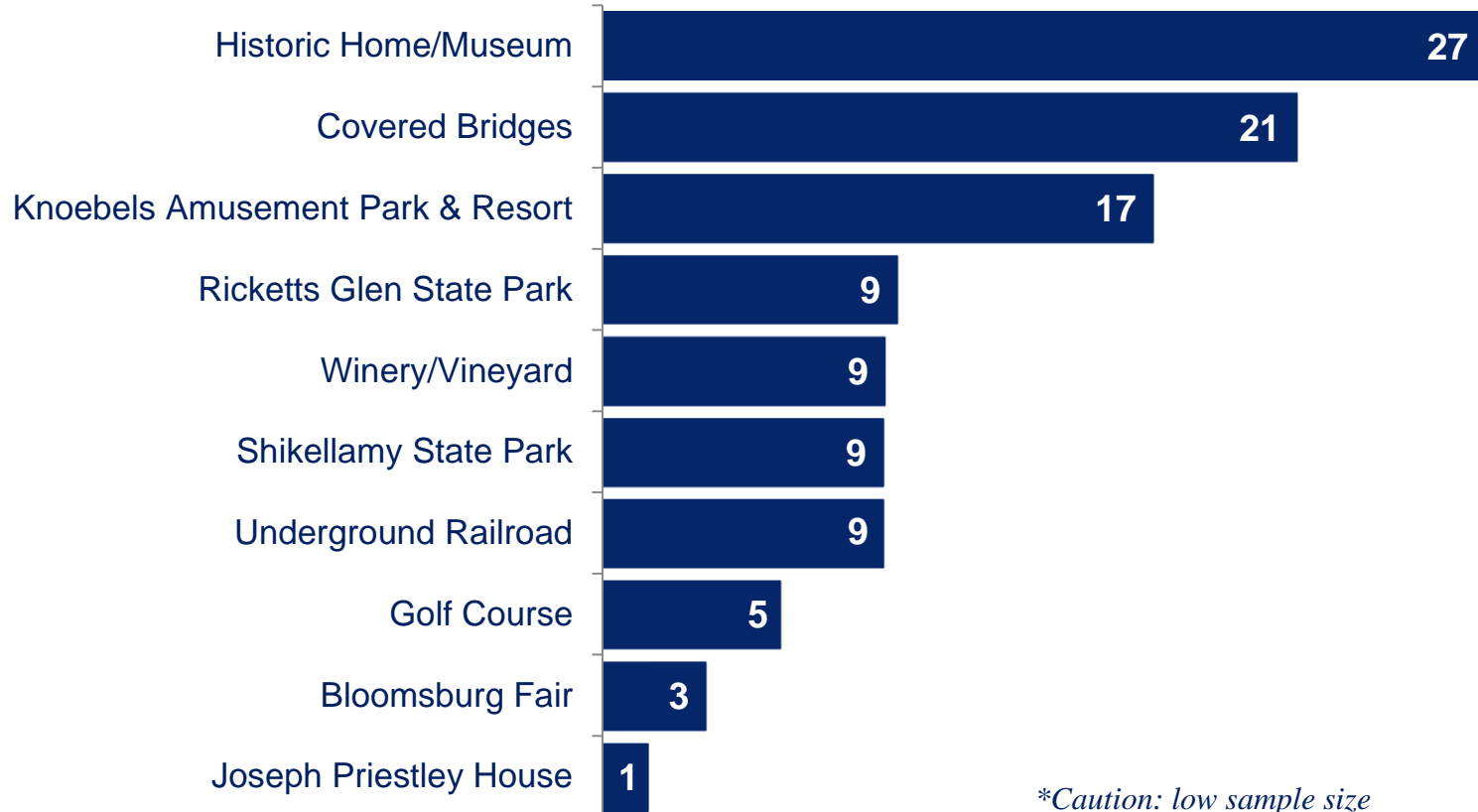
**Remainder of Region*

Pennsylvania Attractions/Events — Valleys of the Susquehanna Region*



Base: Overnight Trips

Percent of Total

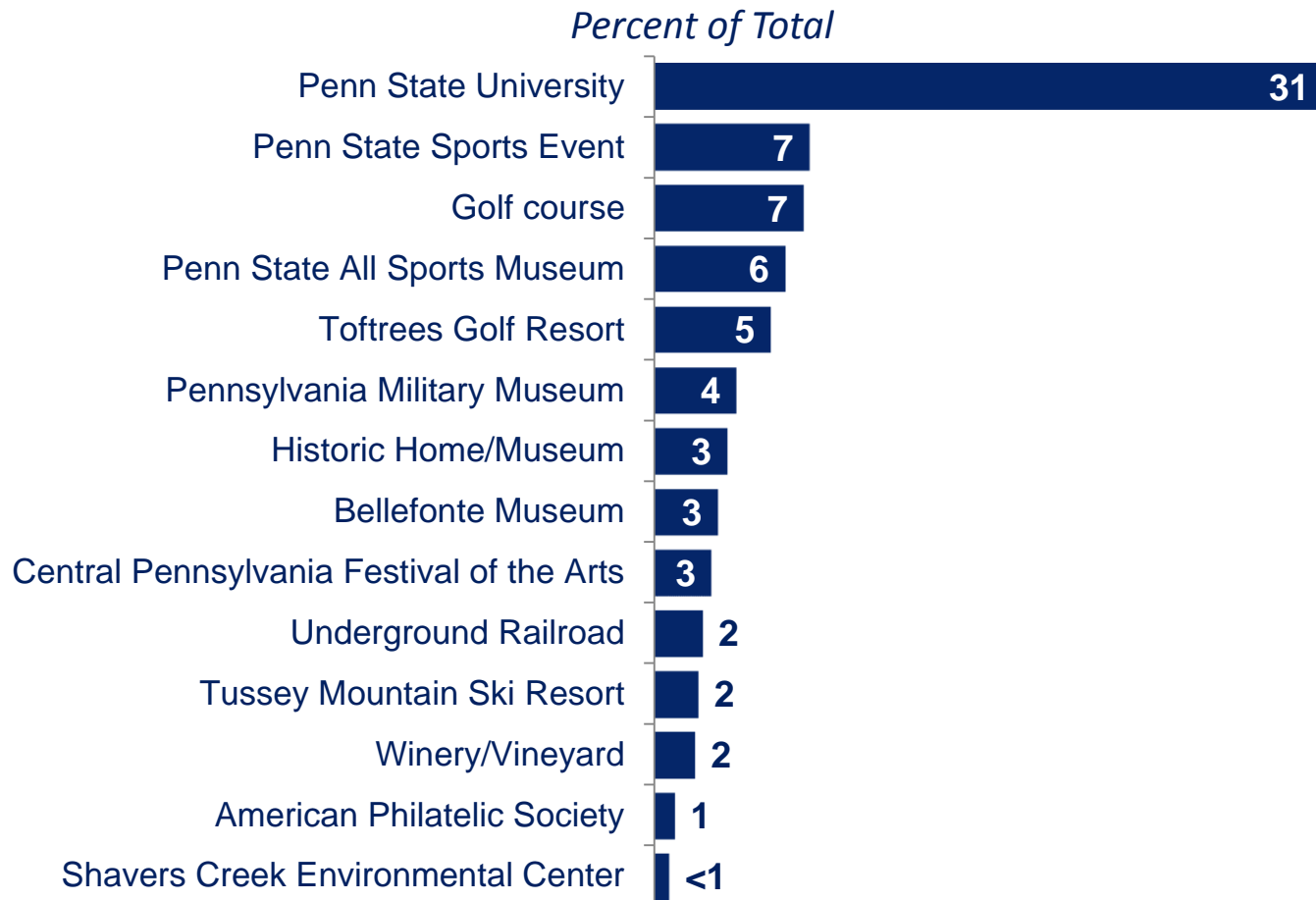


**Caution: low sample size*

Pennsylvania Attractions/Events — The Alleghenies Region*



Base: Overnight Trips

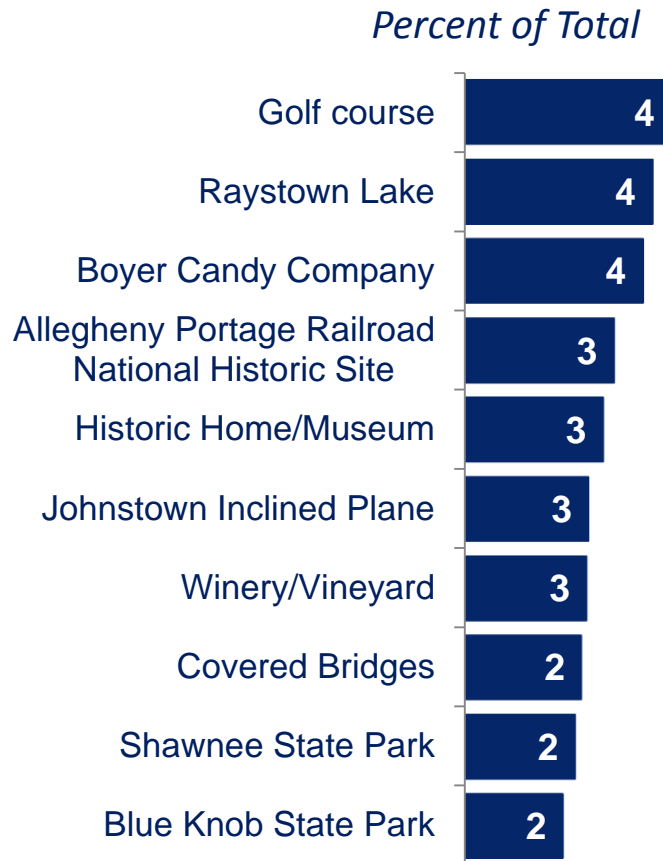


*State College Region

Pennsylvania Attractions/Events — The Alleghenies Region*



Base: Overnight Trips



**Remainder of Region*

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



Base: Overnight Trips

Percent of Total

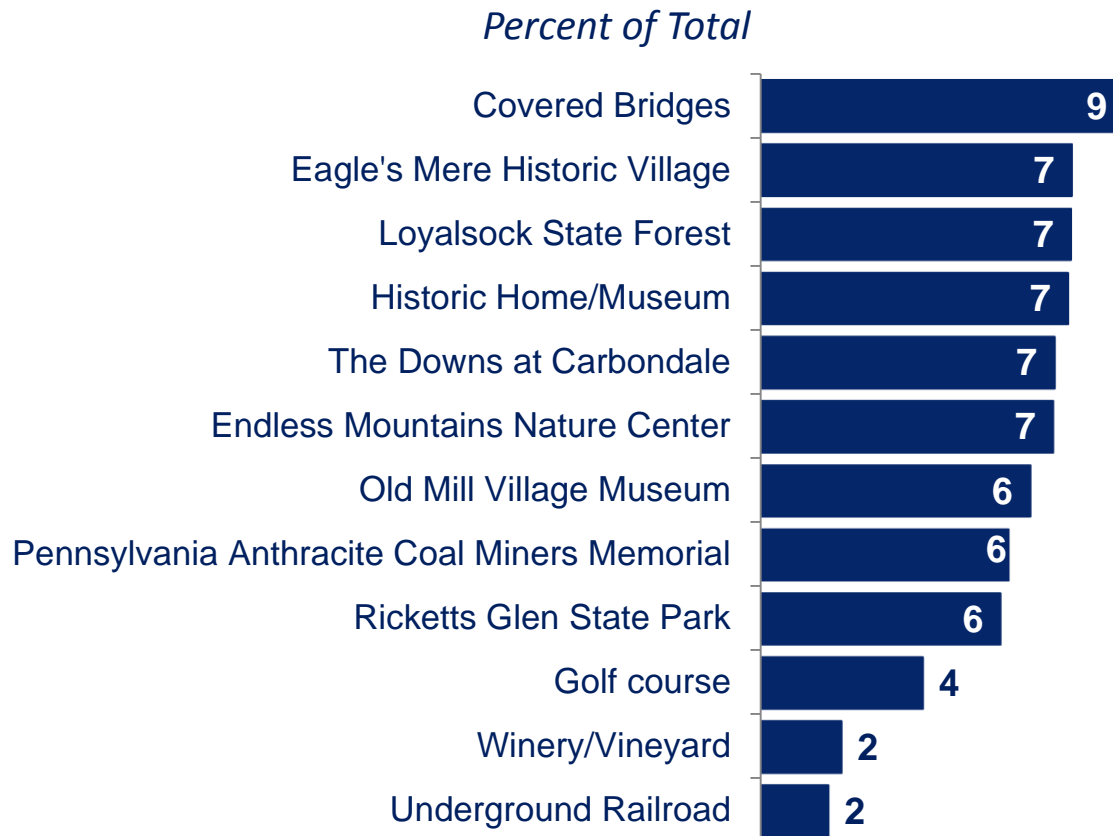


**Remainder of Region*

Pennsylvania Attractions/Events — Upstate PA Region*



Base: Overnight Trips

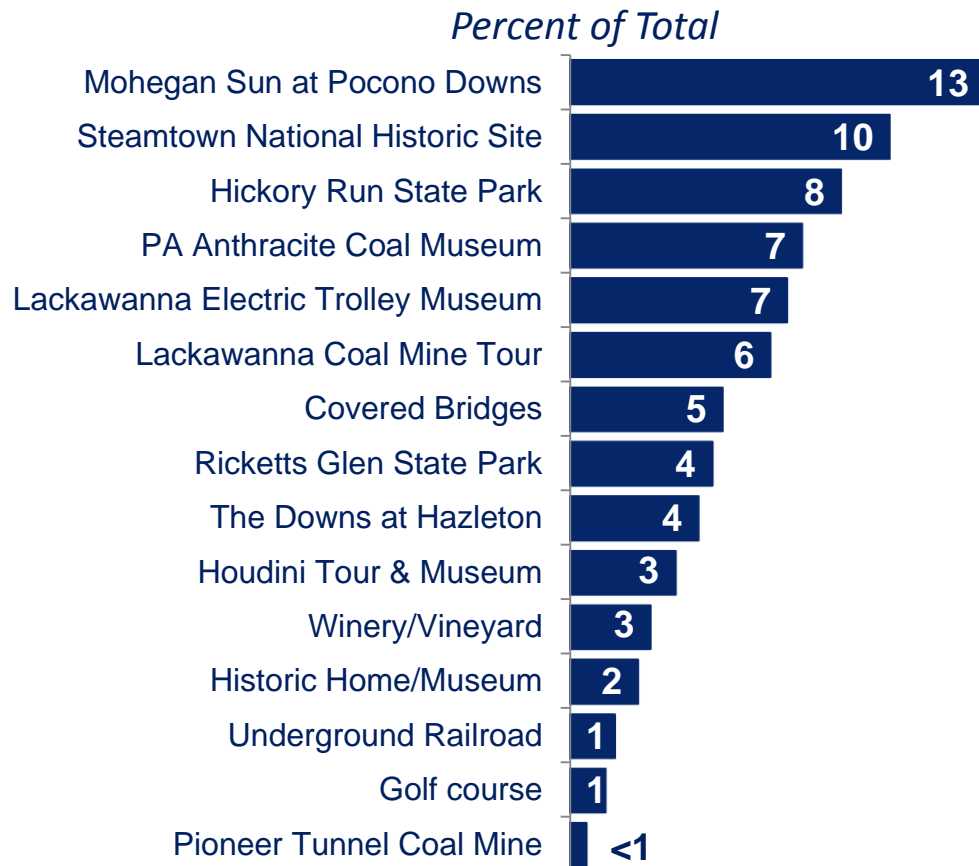


**Endless Mountains*

Pennsylvania Attractions/Events — Upstate PA Region*



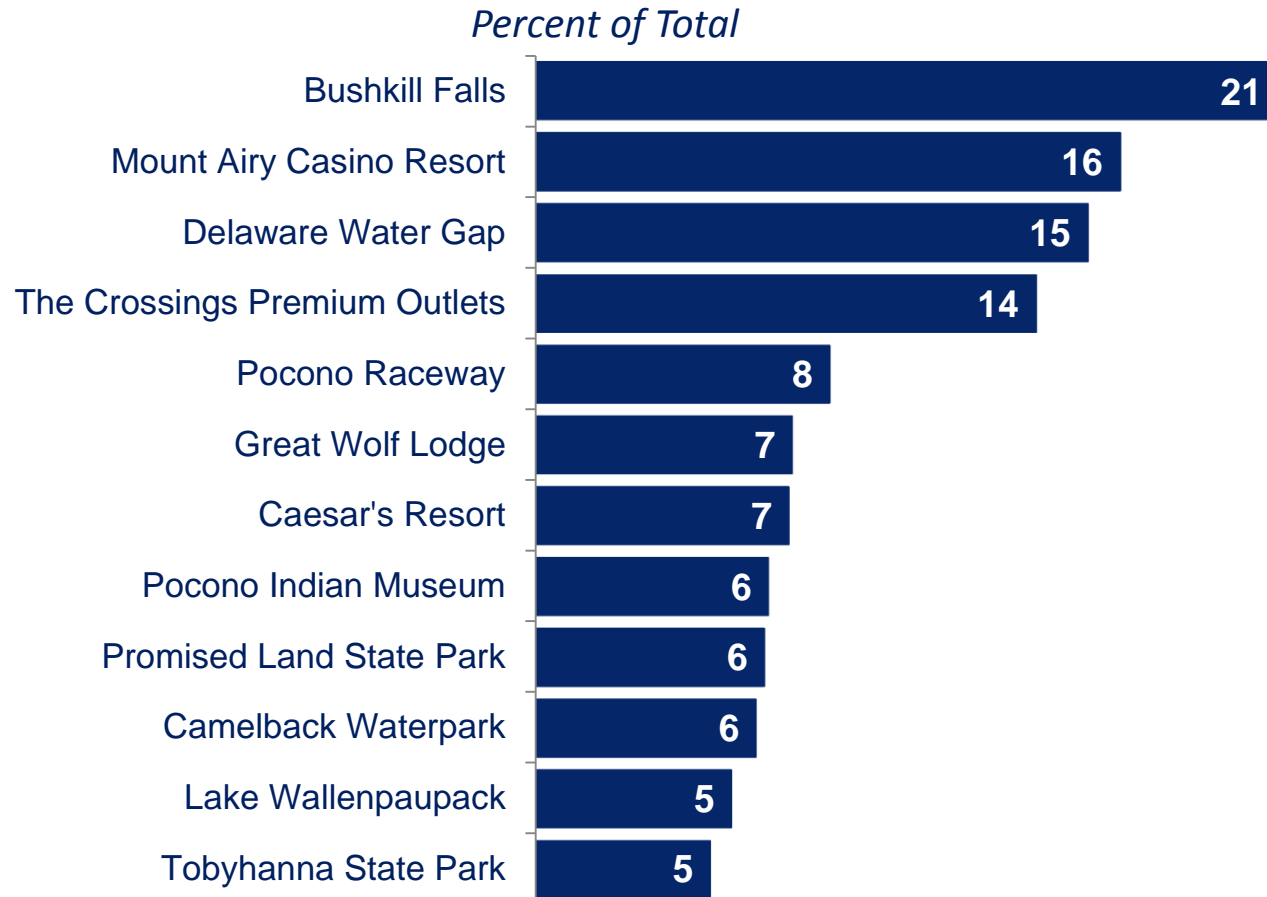
Base: Overnight Trips



Pennsylvania Attractions/Events — Pocono Mountains Region



Base: Overnight Marketable Trips

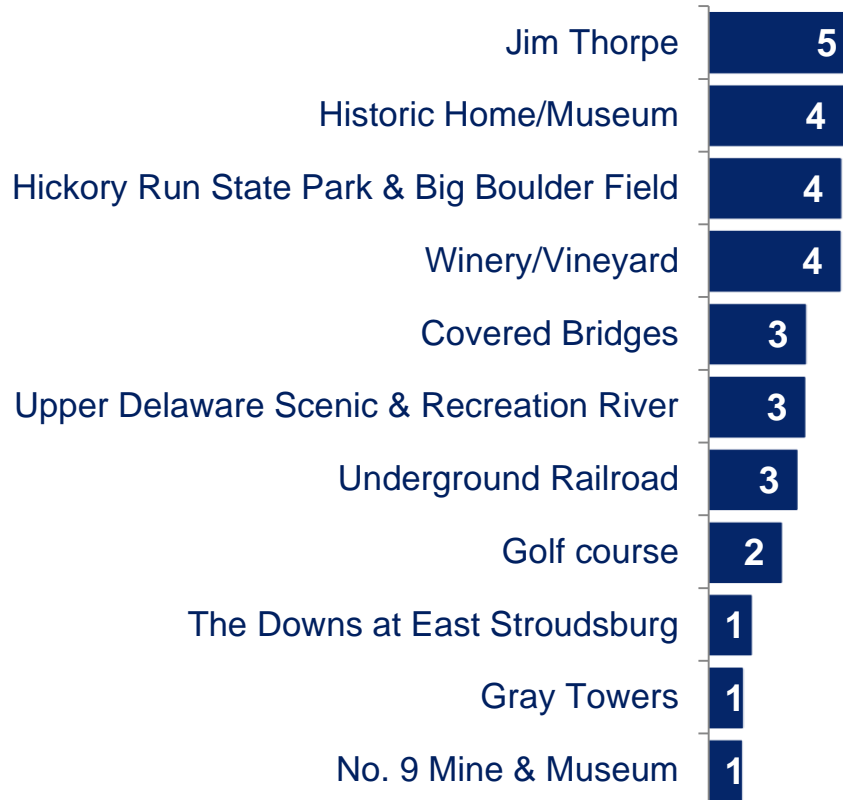


Pennsylvania Attractions/Events — Pocono Mountains Region (cont'd)



Base: Overnight Marketable Trips

Percent of Total



Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

Percent of Total



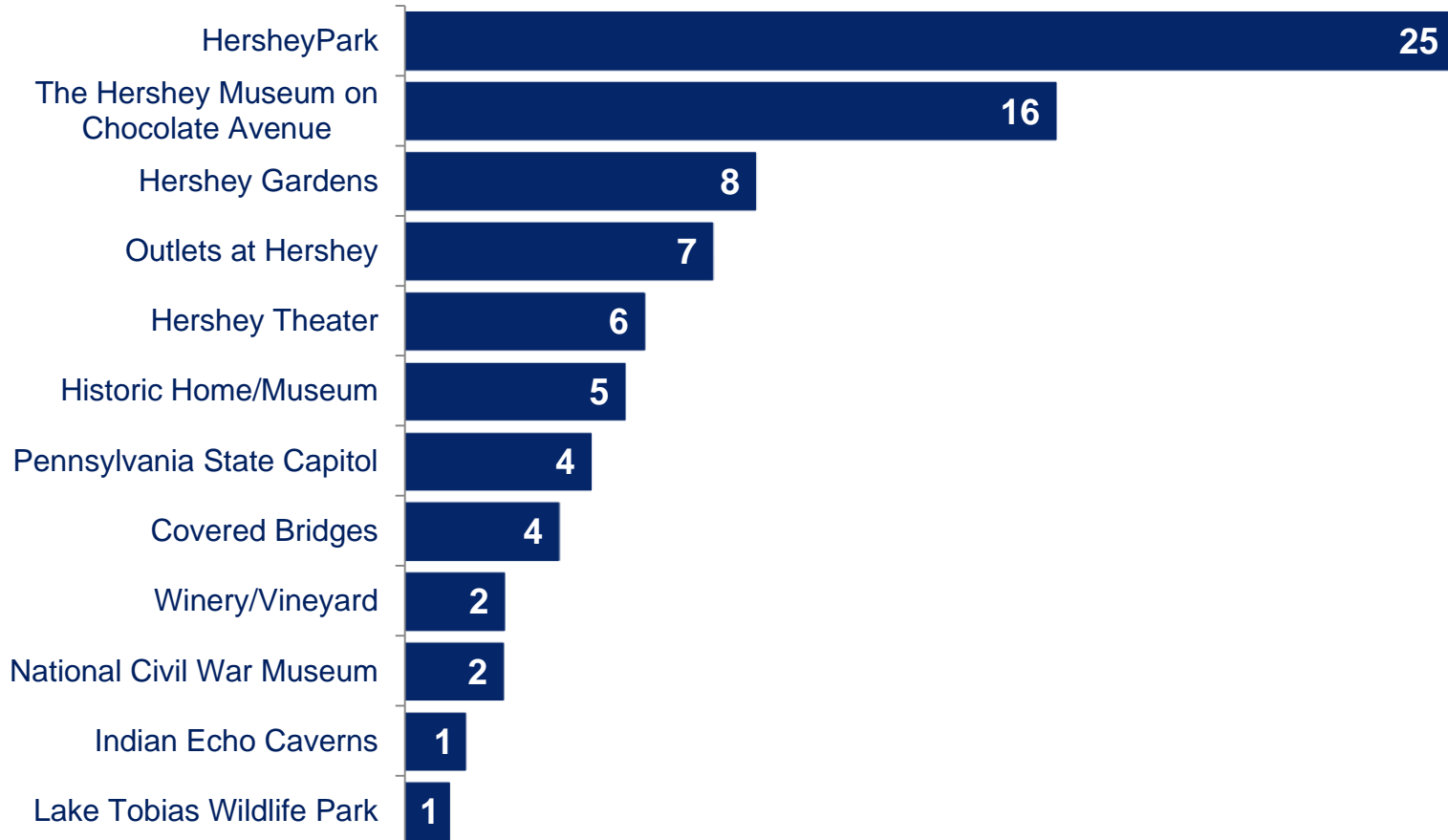
*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have a combined net participation rate of 13%.

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

Percent of Total

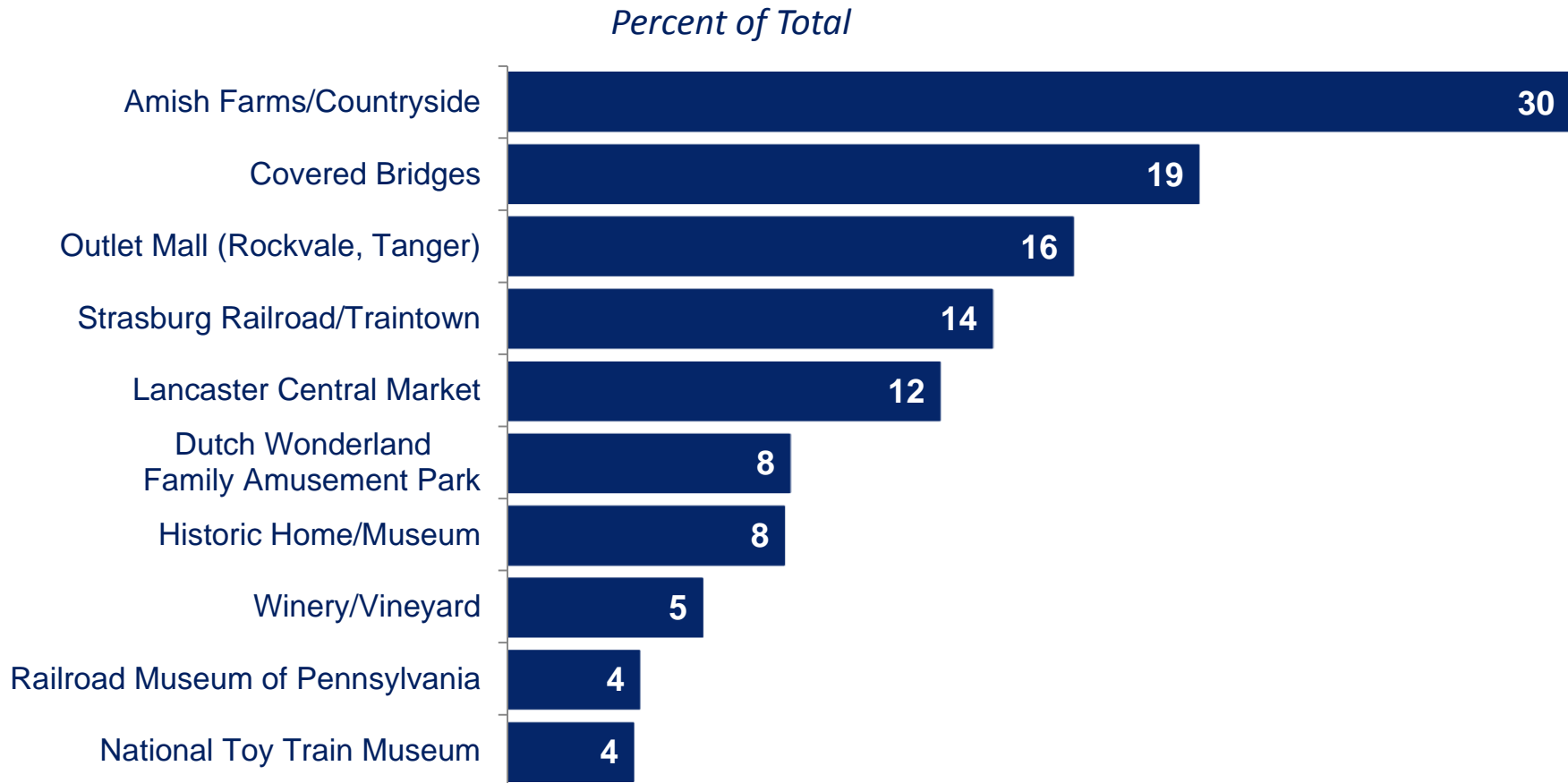


* Hershey-Harrisburg Area

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips



Pennsylvania Attractions/Events — Dutch Country Roads Region* (cont'd)



Base: Overnight Marketable Trips

Percent of Total



**Lancaster Amish Farmland*

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

Percent of Total

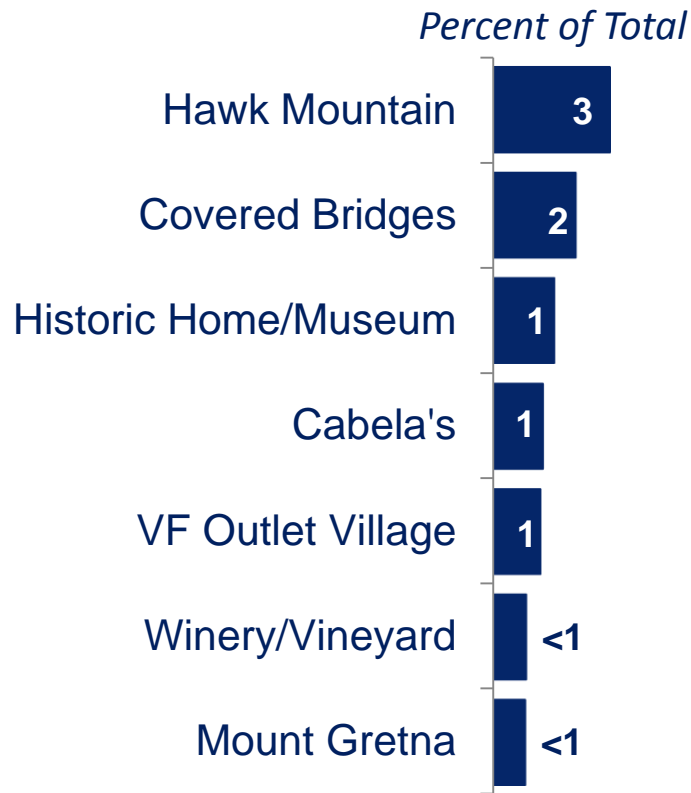


*York Region

Pennsylvania Attractions/Events — Dutch Country Roads Region*



Base: Overnight Marketable Trips

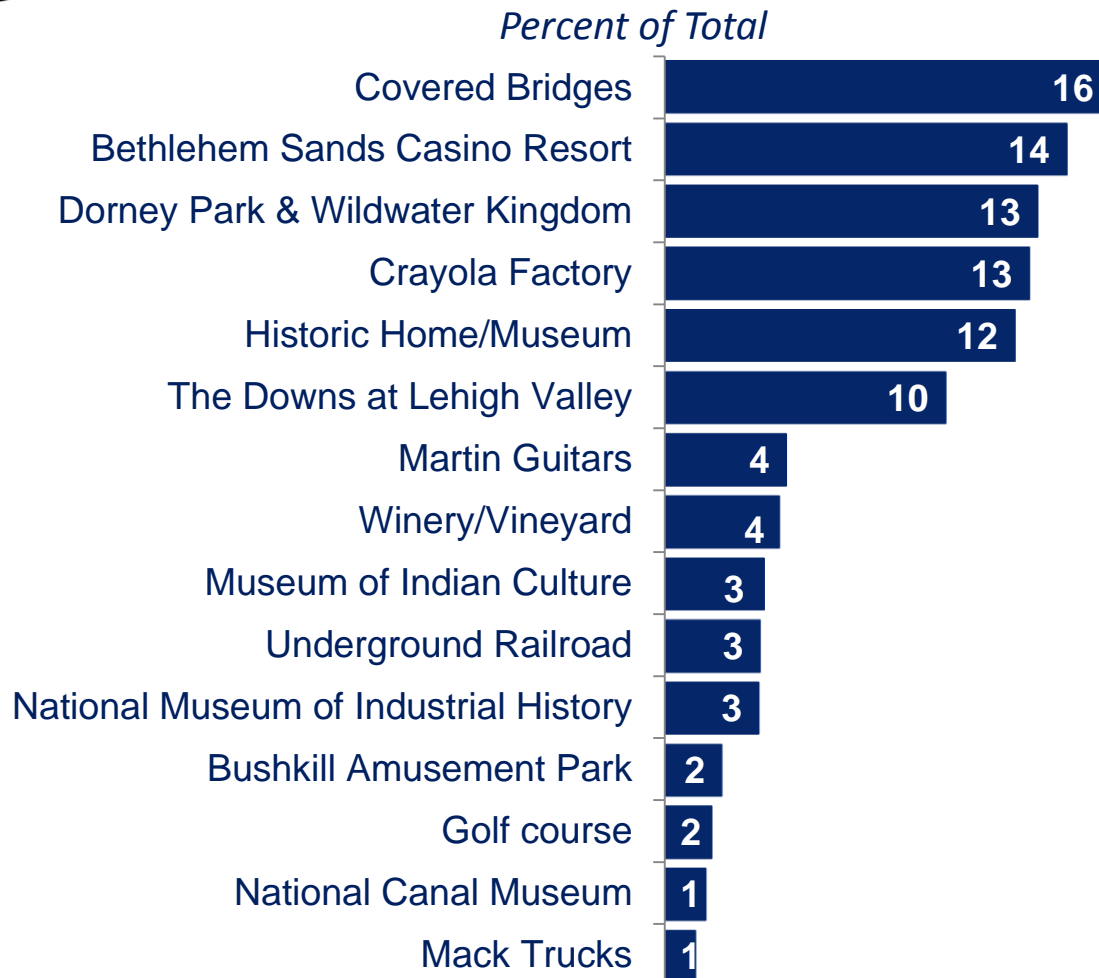


**Remainder of region*

Pennsylvania Attractions/Events — Lehigh Valley Region



Base: Overnight Trips



Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips

Percent of Total



*Philadelphia

Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips



*Philadelphia

Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips

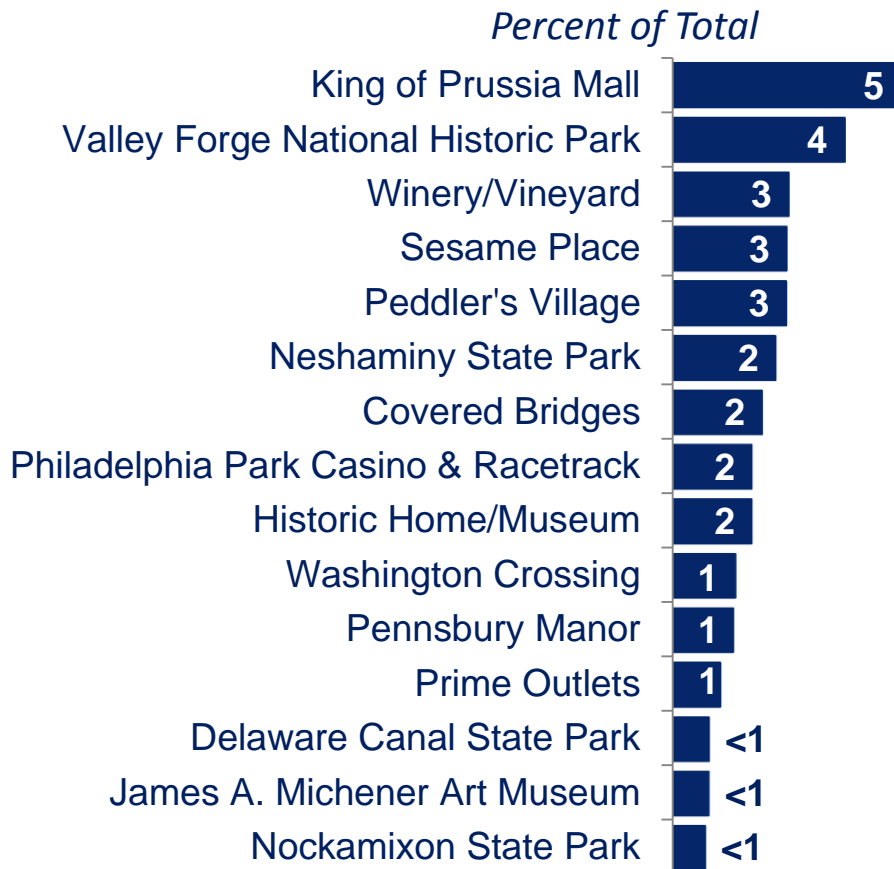


*Brandywine Valley

Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*



Base: Overnight Marketable Trips



*Remainder of Region

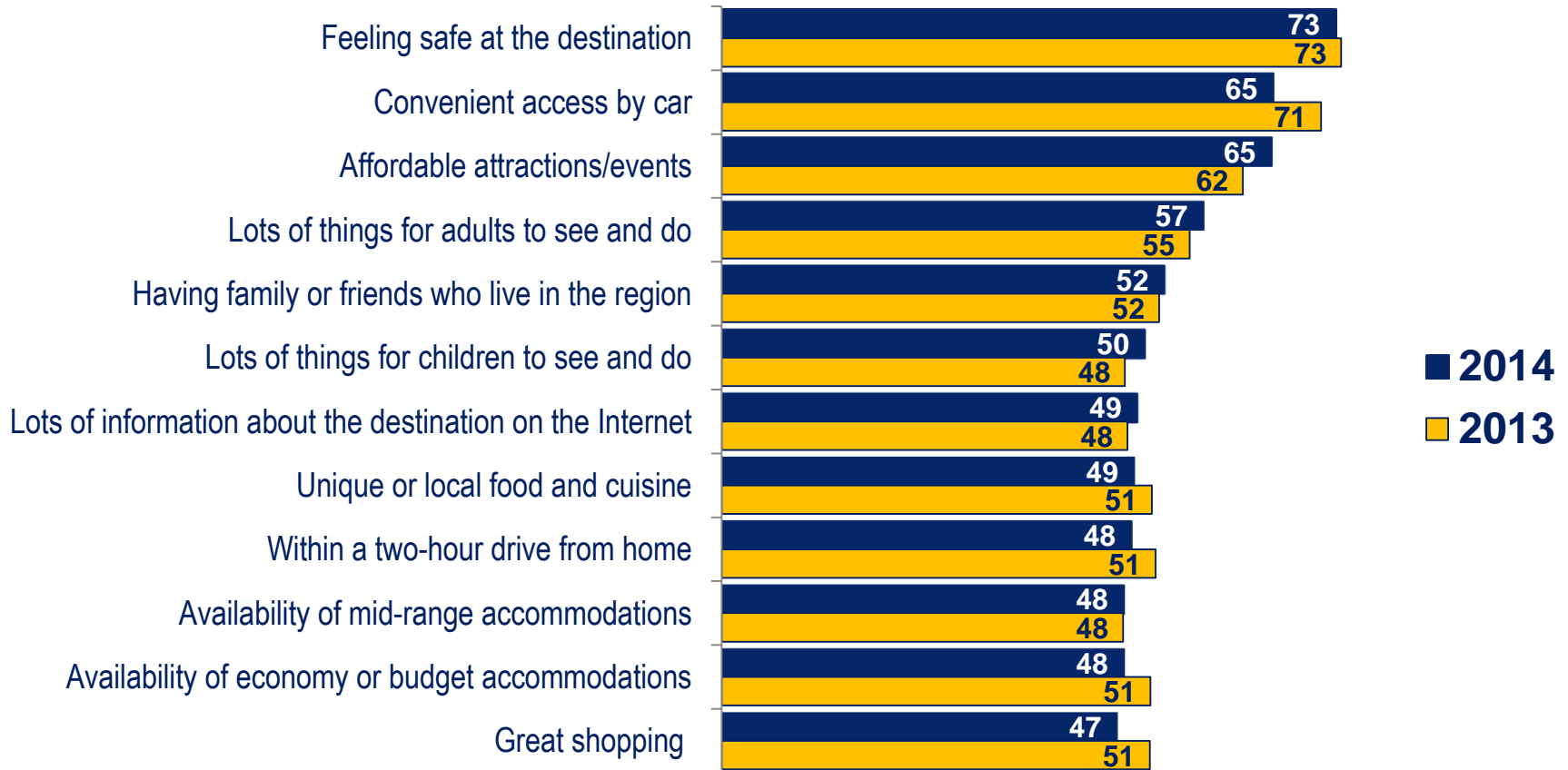
Importance of Factors in Choice of Pennsylvania Tourism Region

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



Base: Overnight Trips

*% Rating Factor As Very Important**



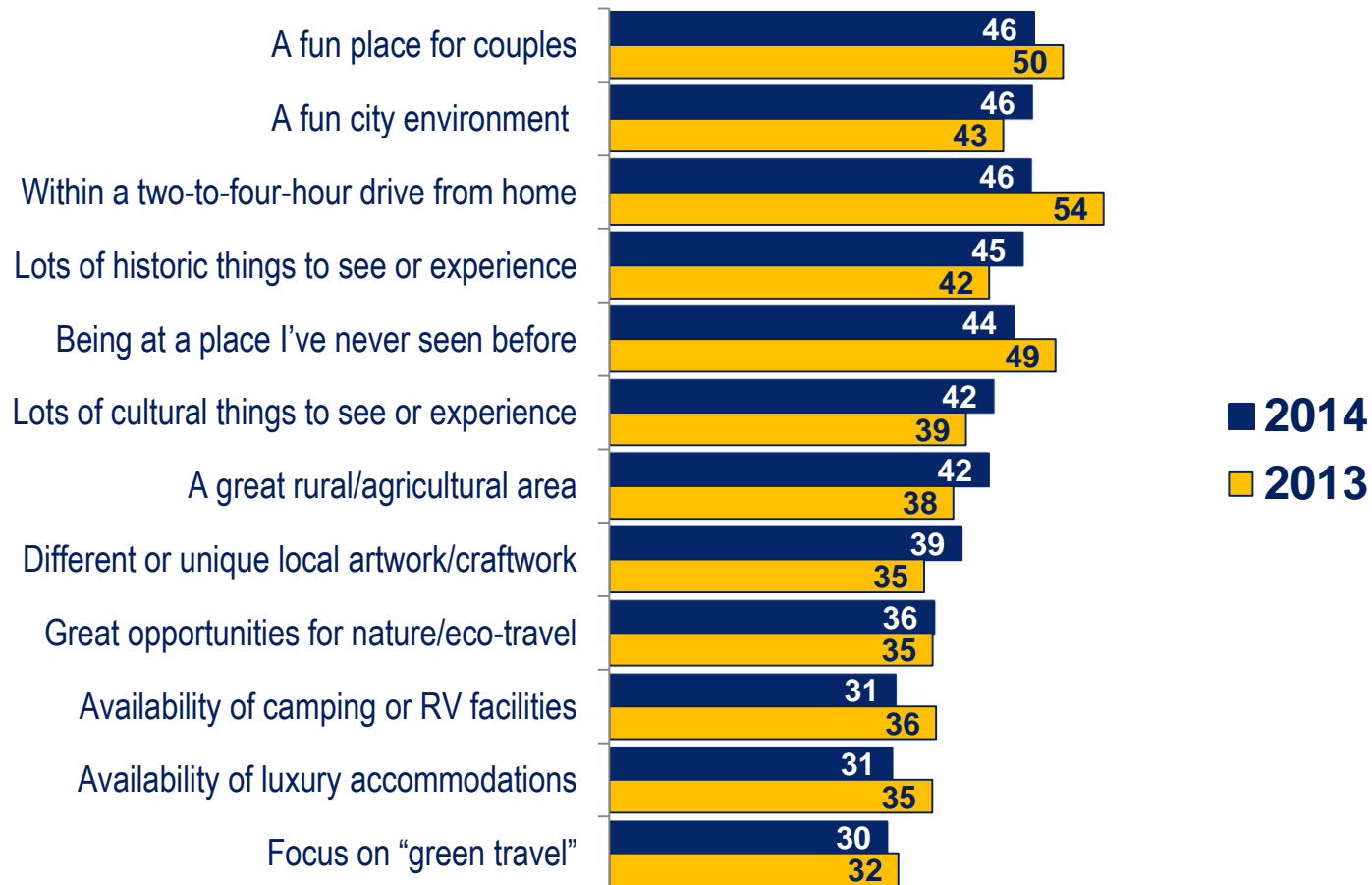
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

*Percent 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**



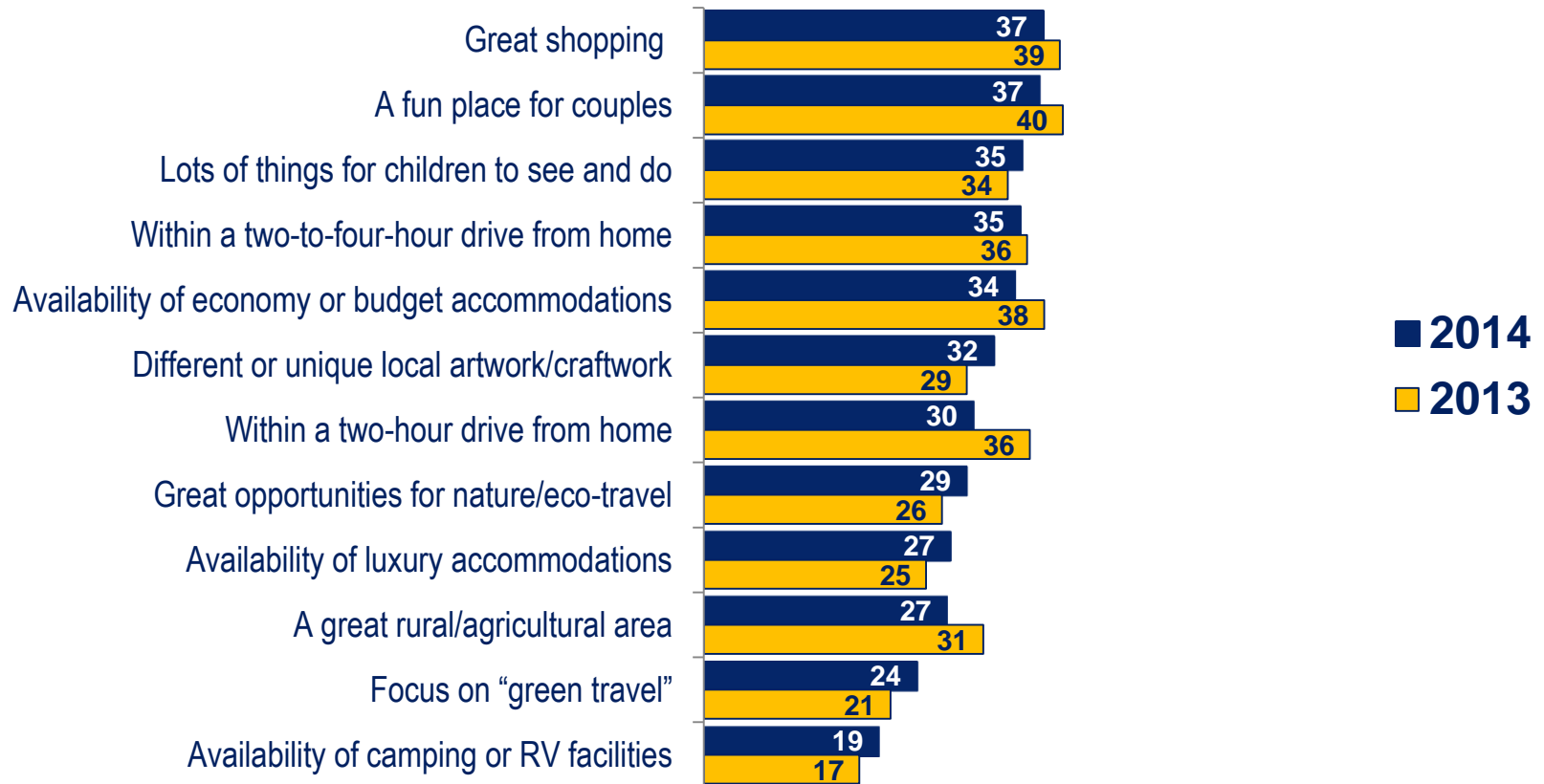
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important*



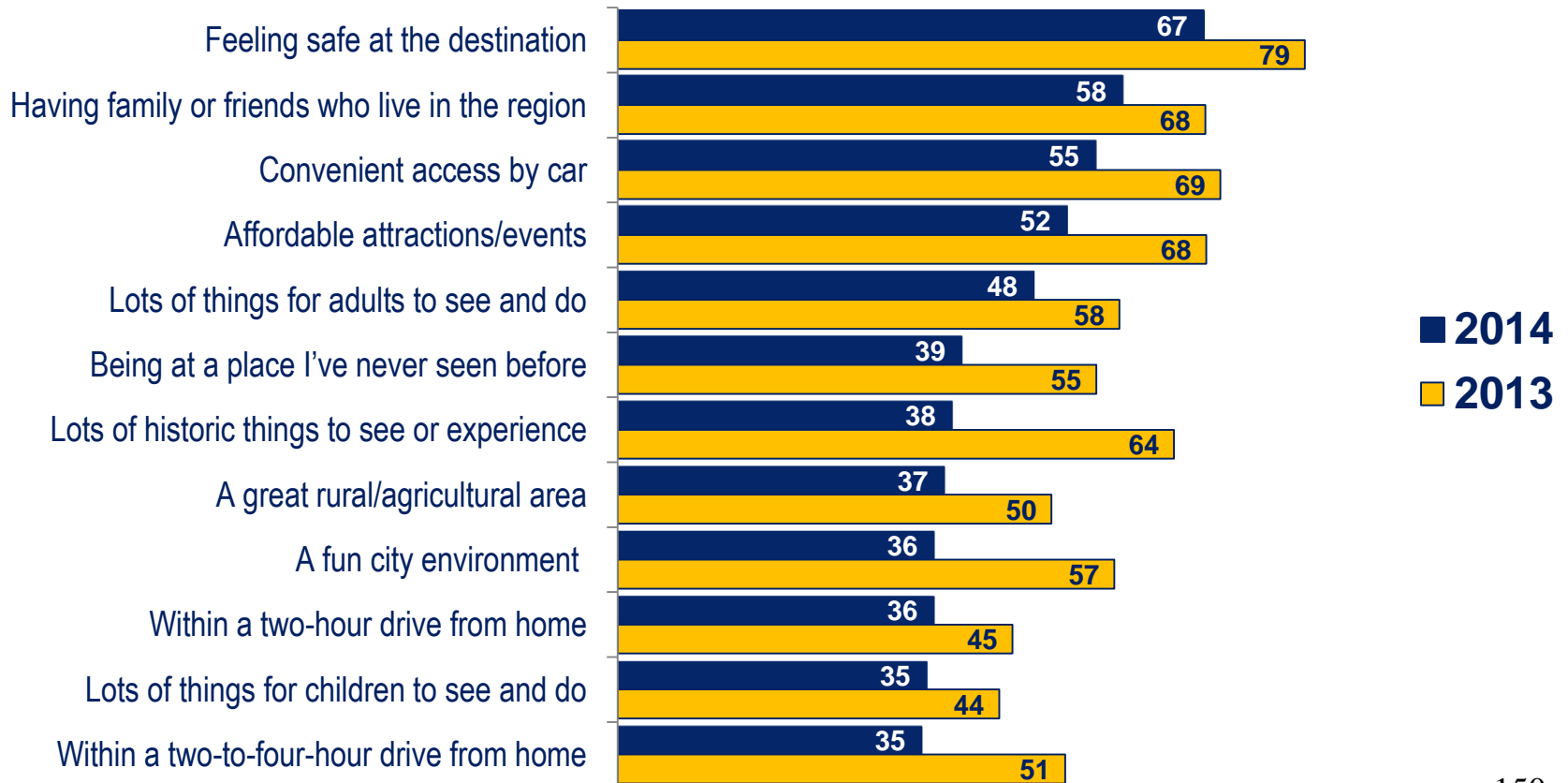
* Rated 8, 9 or 10 on 10-pt. Importance scale

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**



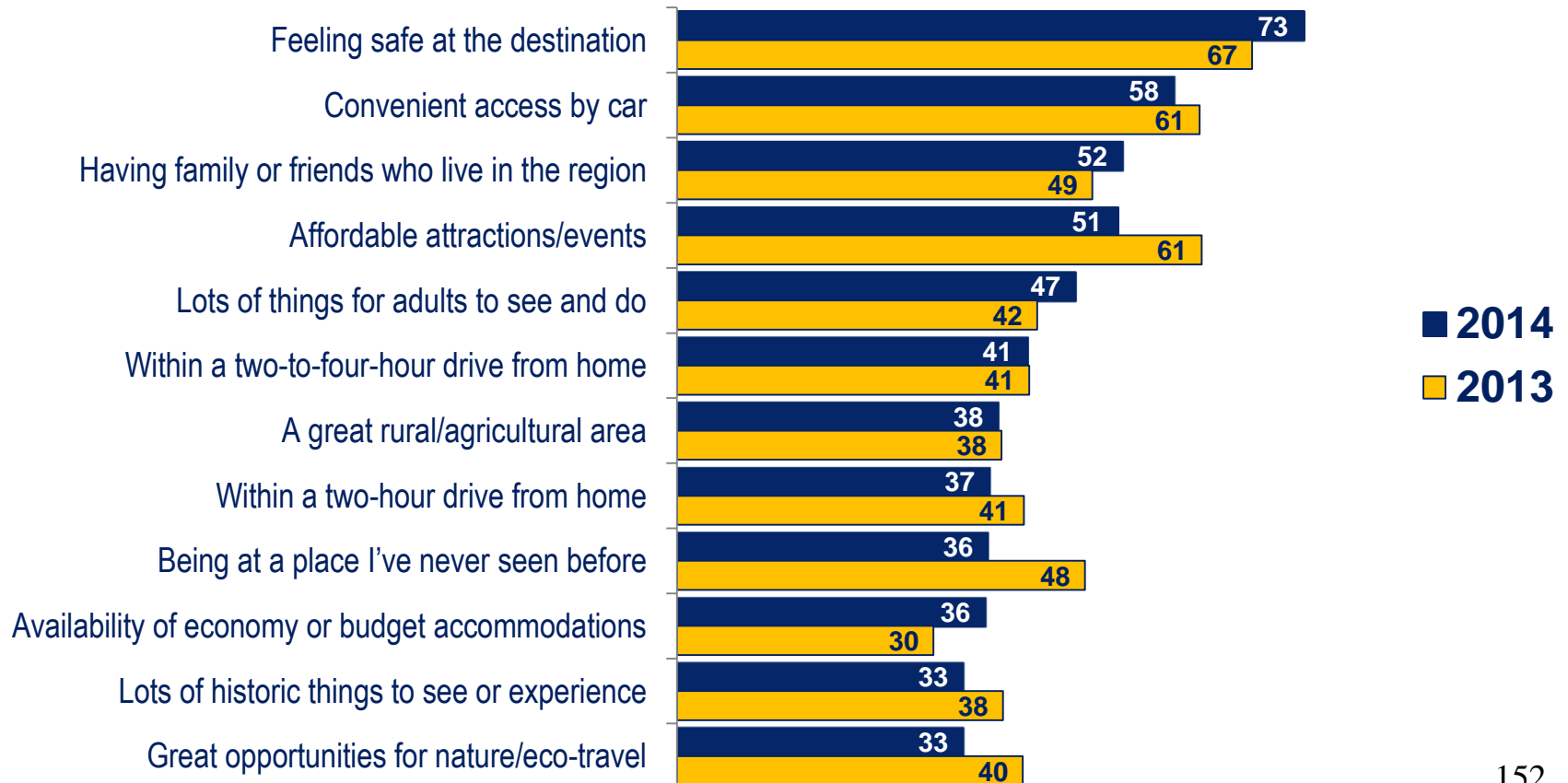
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Pennsylvania Wilds



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2014
■ 2013

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

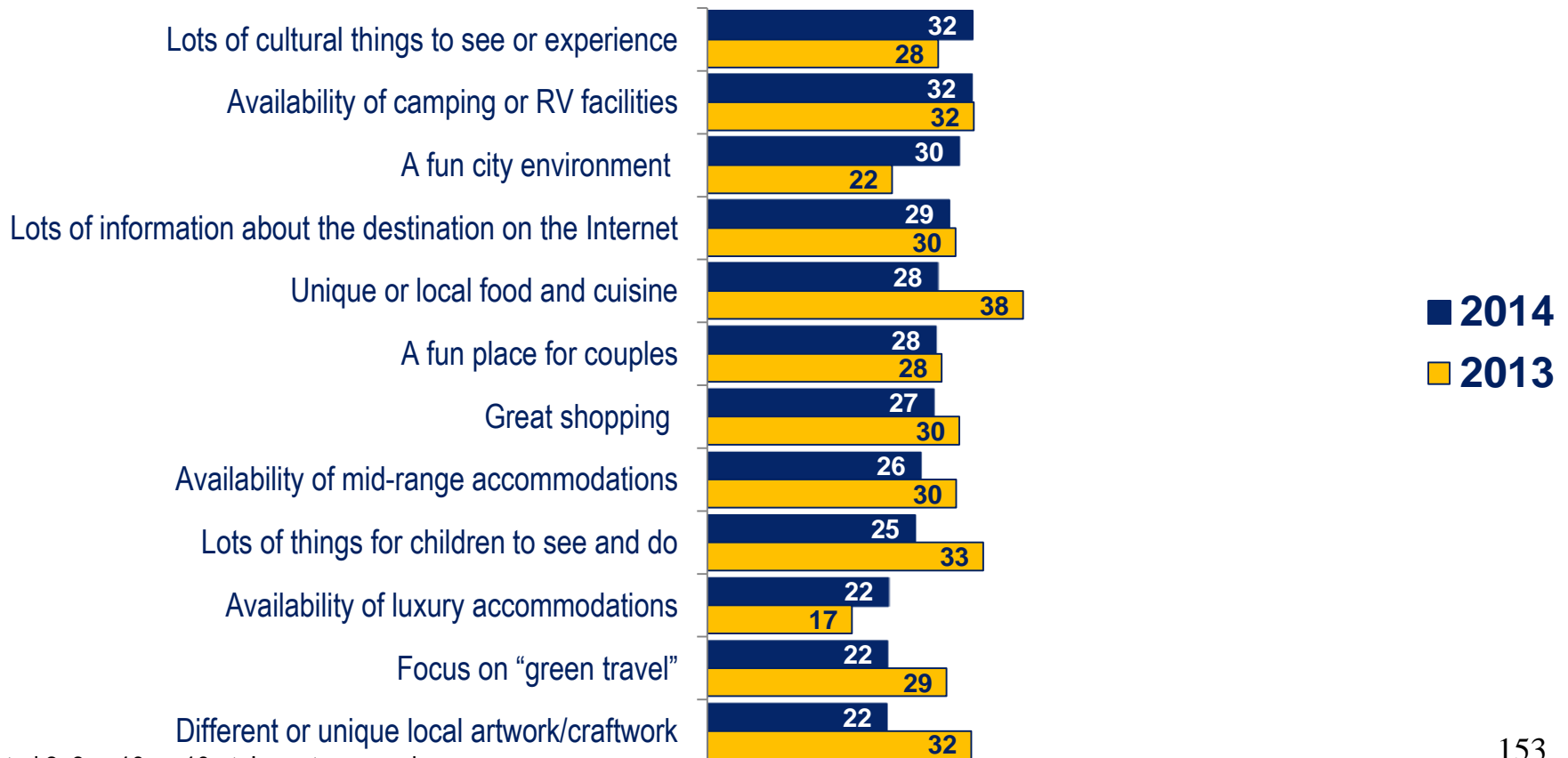
*Caution: low sample size

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



Base: Overnight Trips

% Rating Factor As Very Important*



■ 2014
■ 2013

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

*Caution: low sample 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

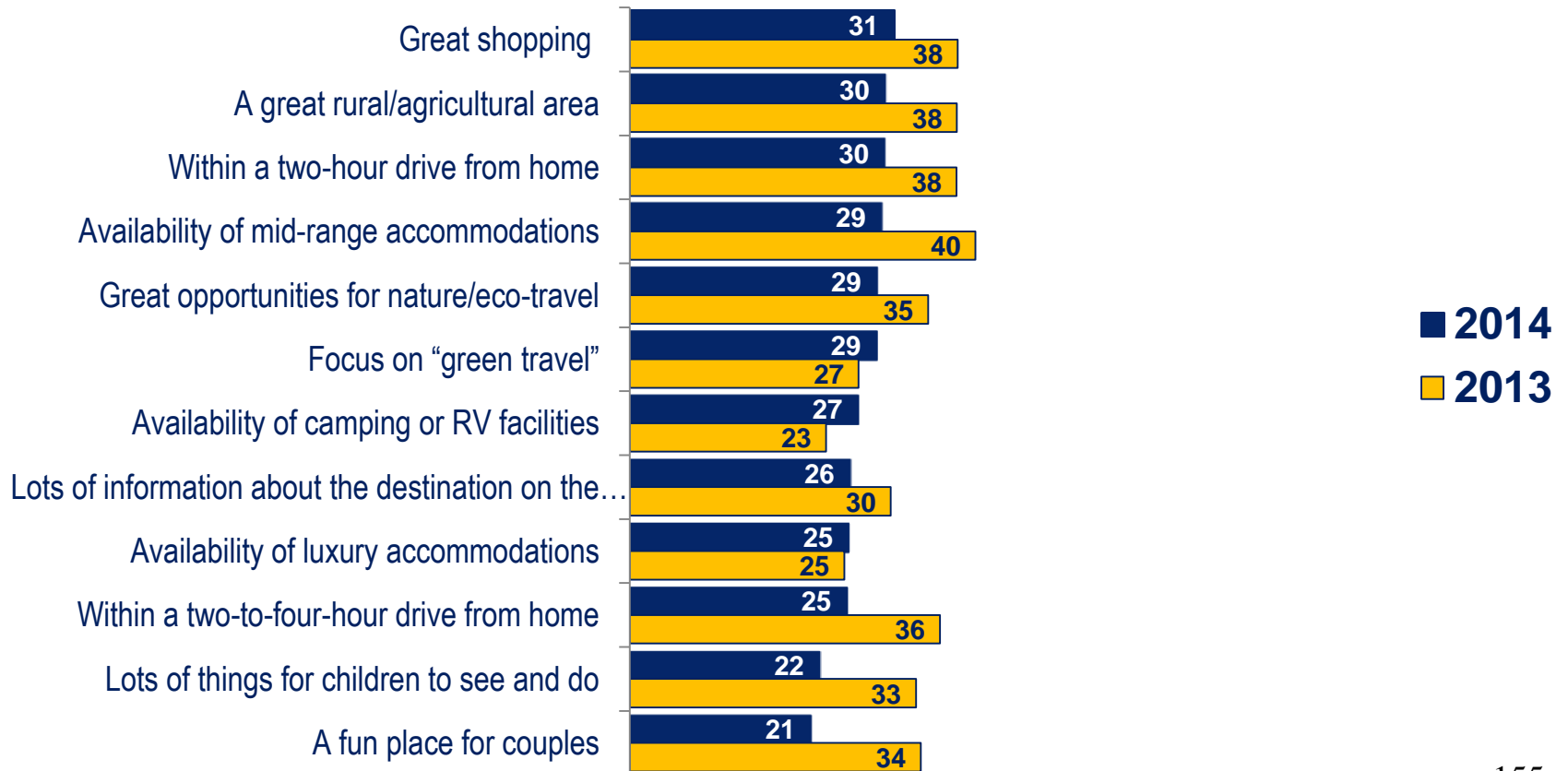
*Caution: low sample size

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

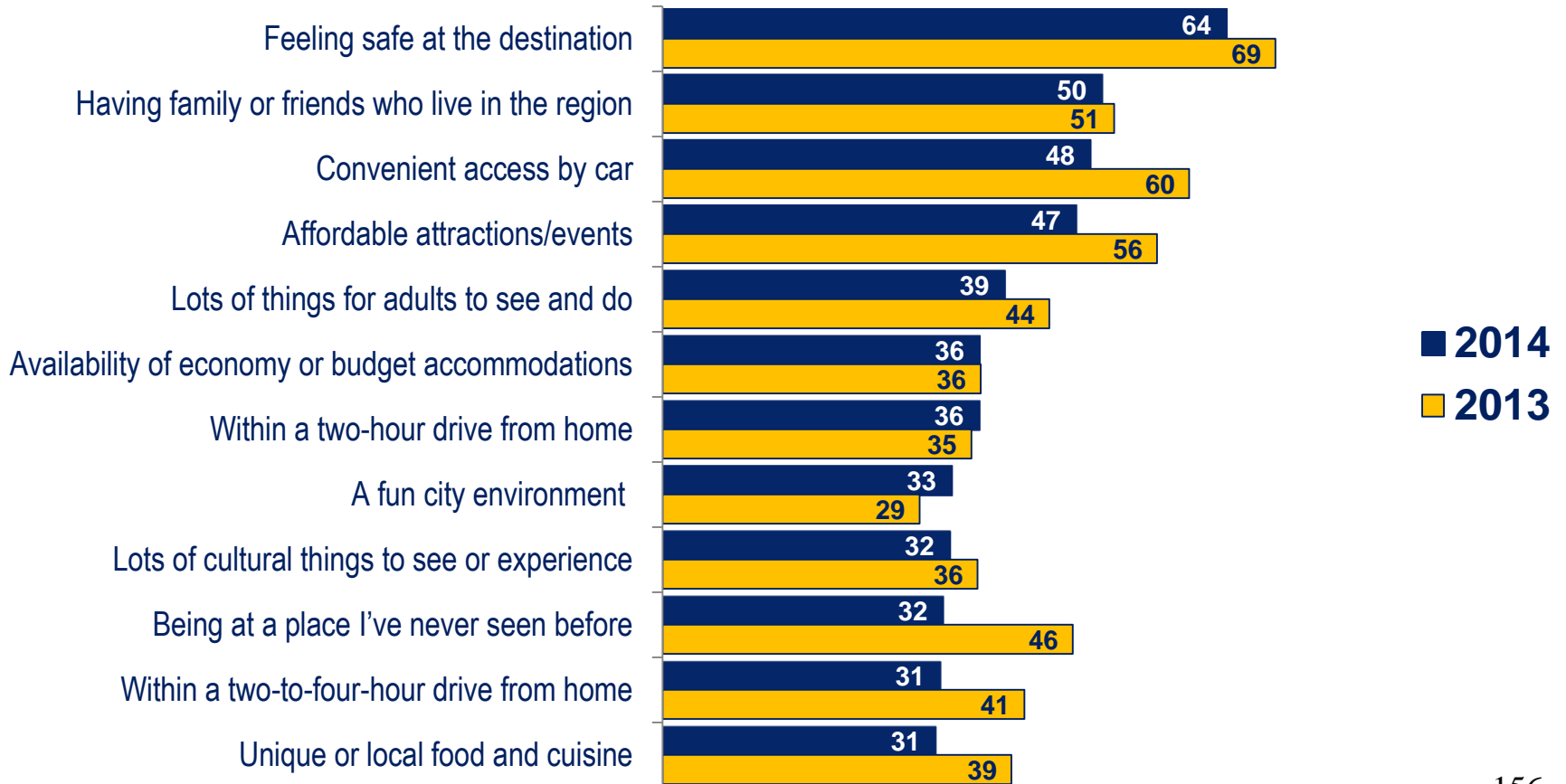
*Caution: low sample size

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**



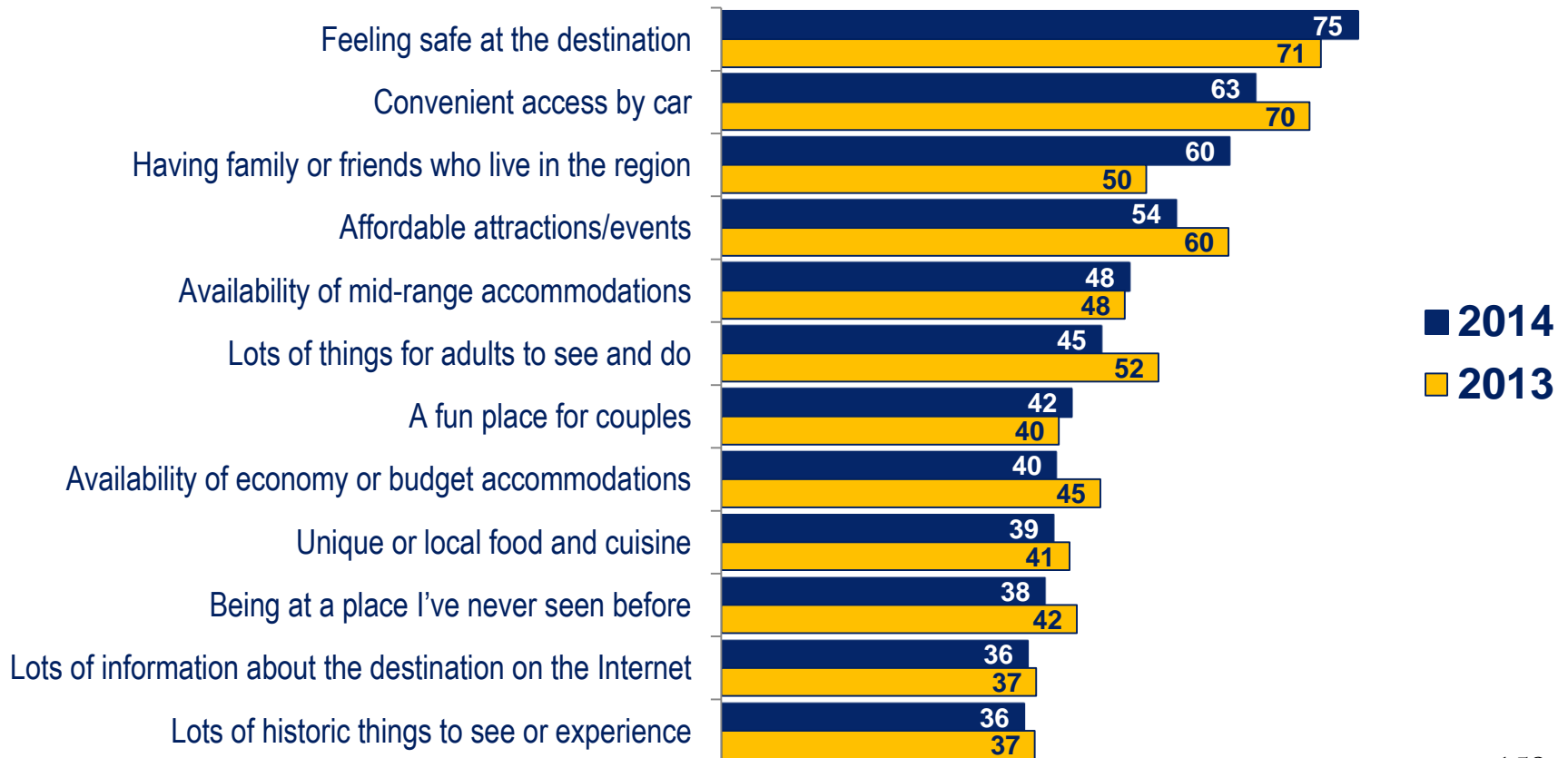
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Upstate PA



Base: Overnight Trips

*% Rating Factor As Very Important**



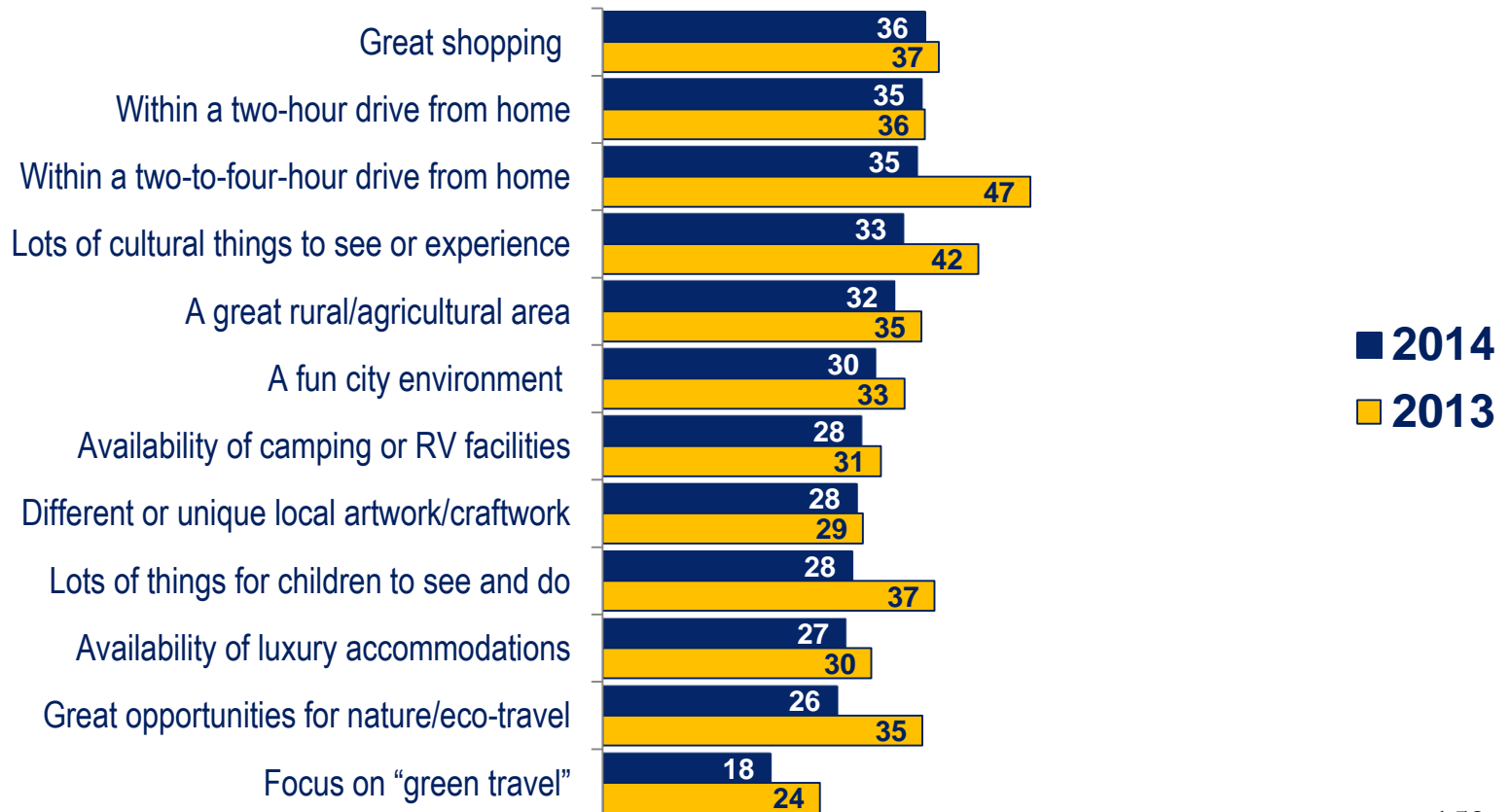
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

*% Rating Factor As Very Important**



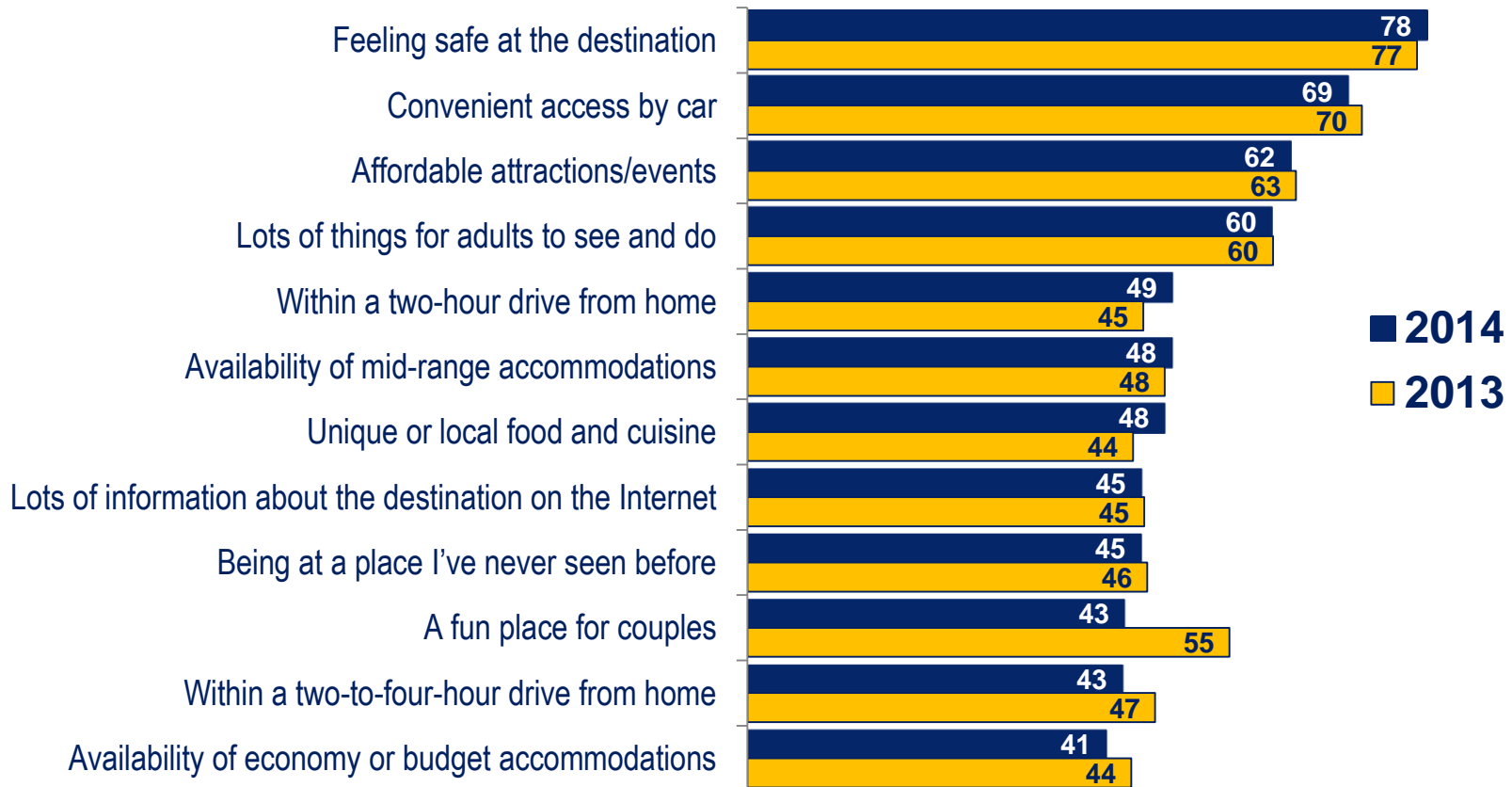
* Rated 8, 9 or 10 on 10-pt. Importance scale

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: Overnight Marketable Trips

*% Rating Factor As Very Important**



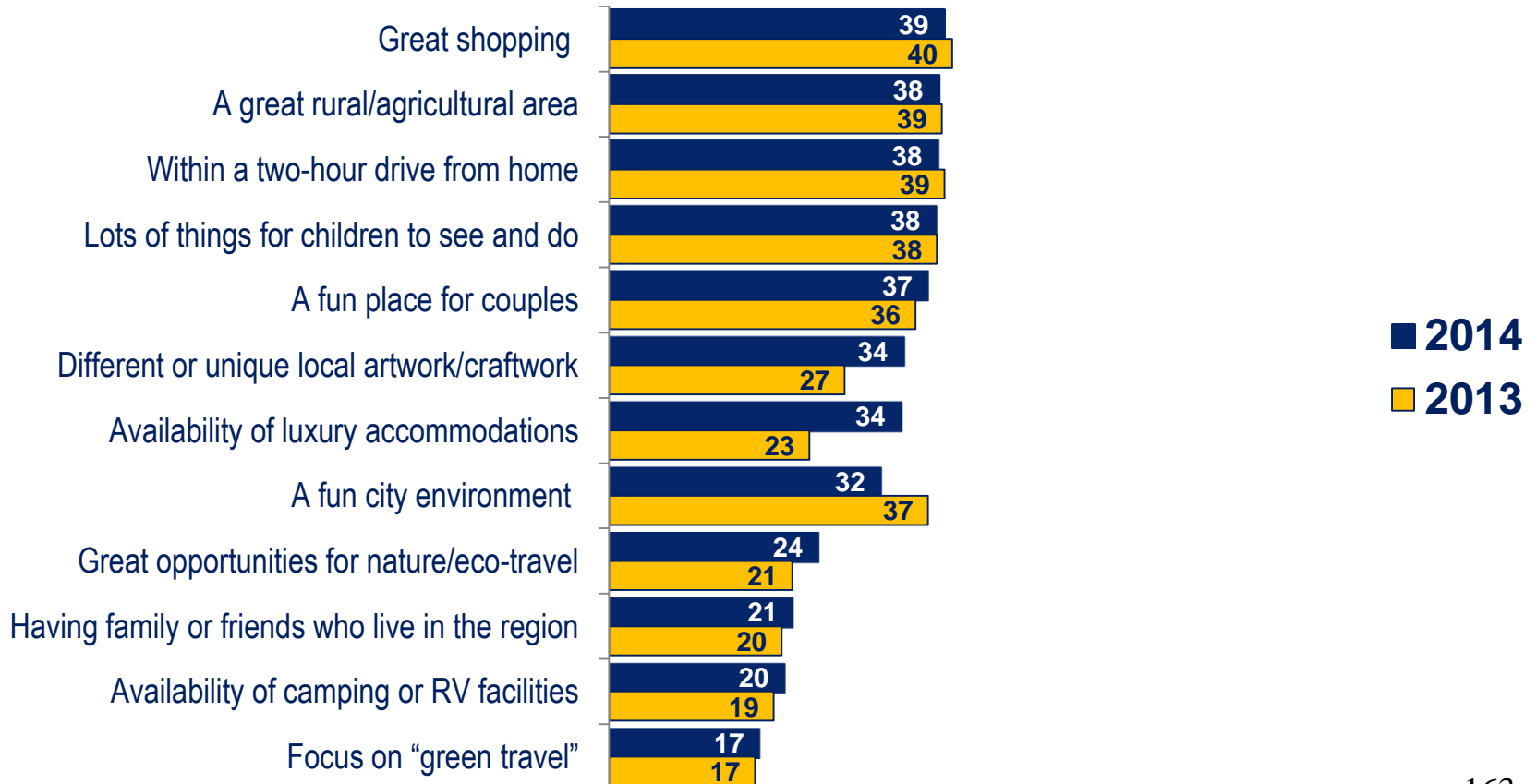
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Marketable Trips

*% Rating Factor As Very Important**



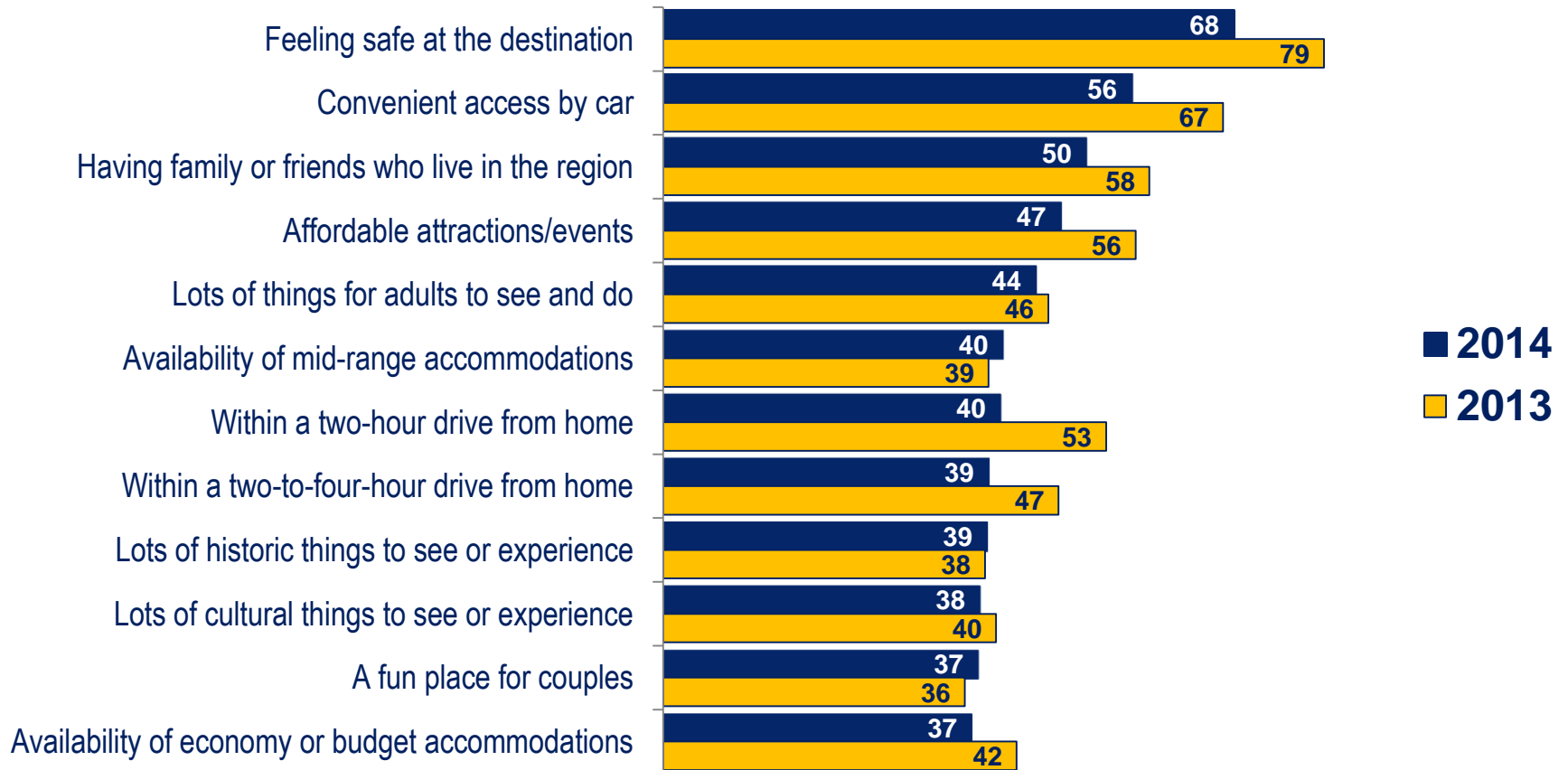
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Lehigh Valley



Base: Overnight Trips

*% Rating Factor As Very Important**



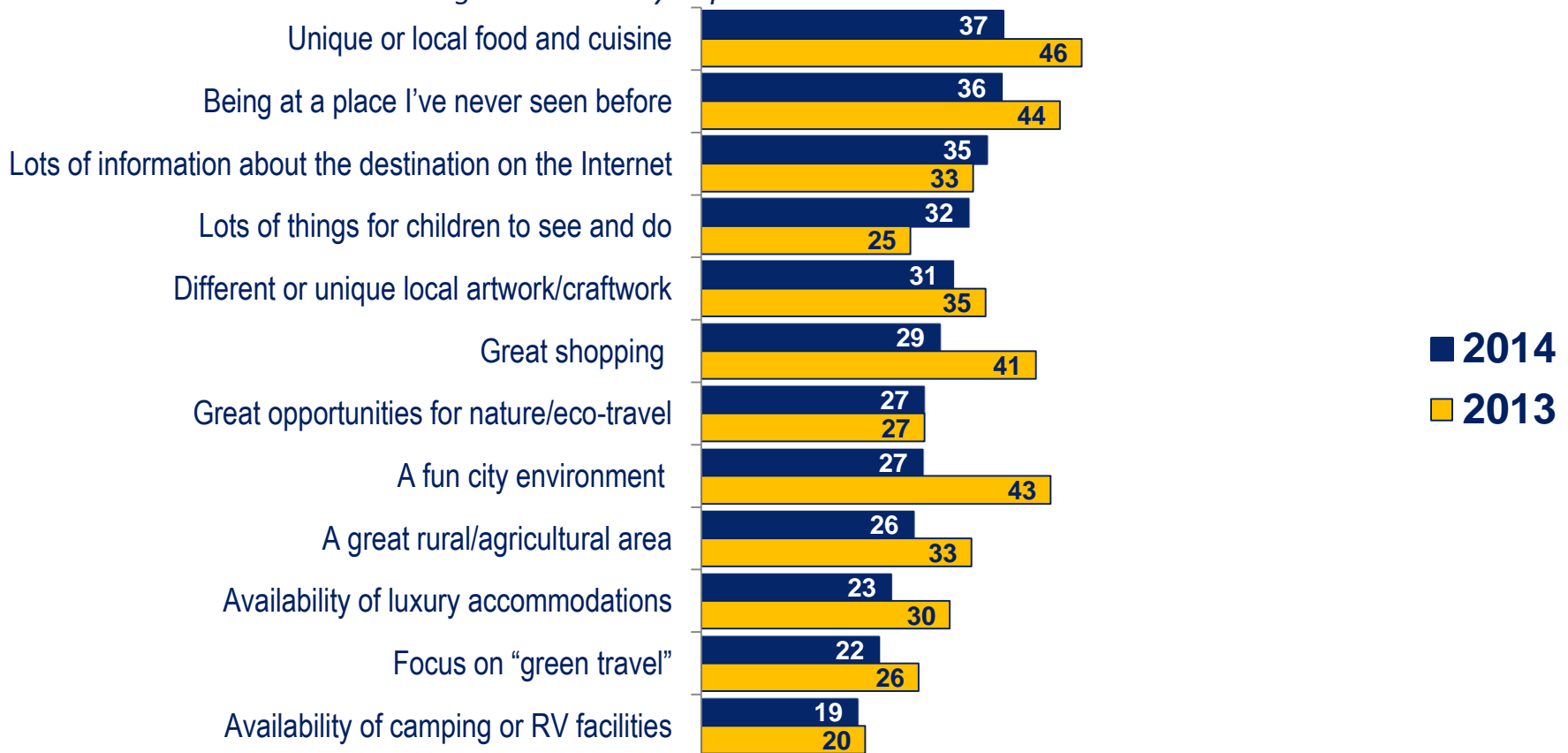
* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

*% Rating Factor As Very Important**



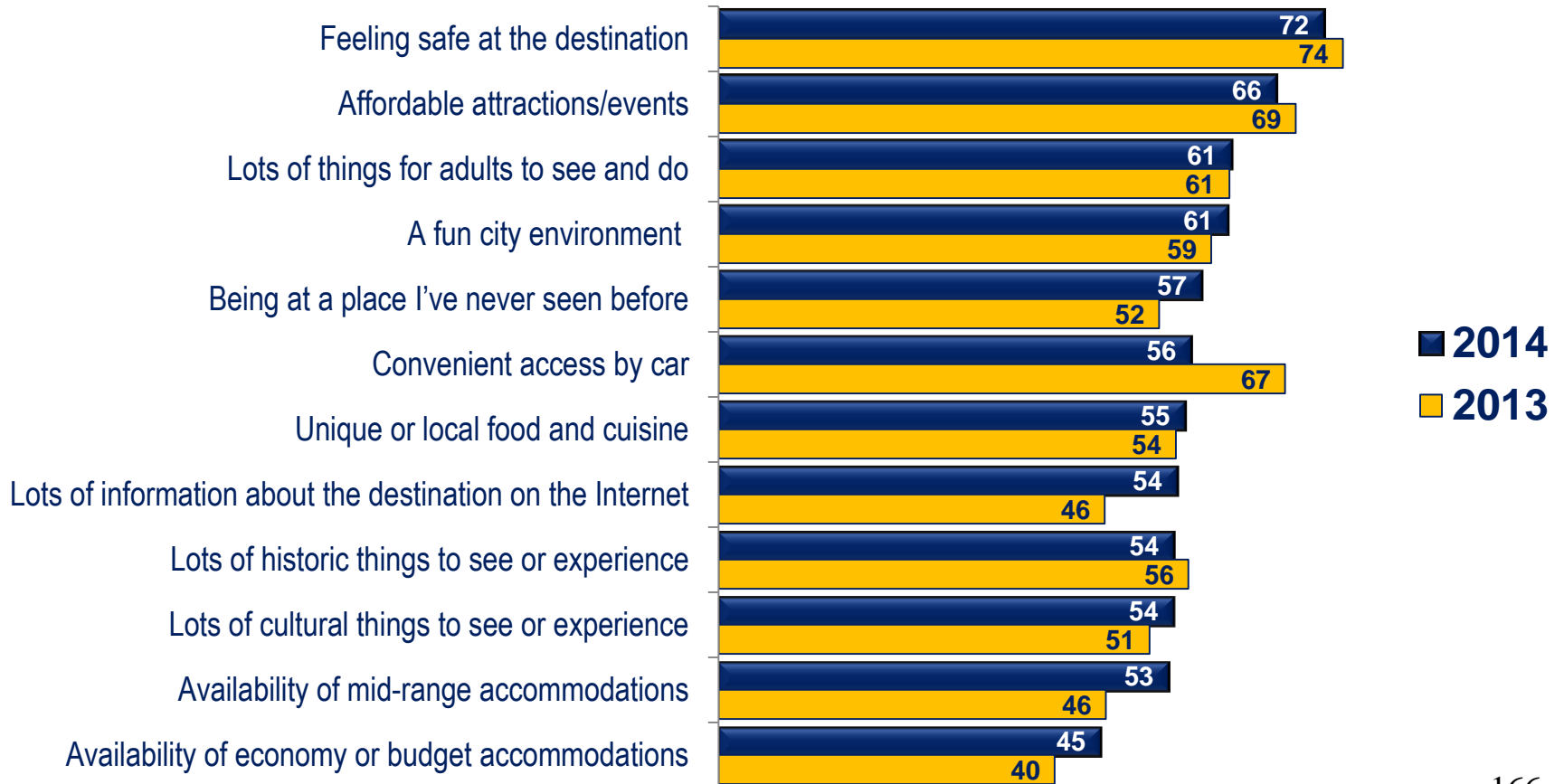
* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Philadelphia & The Countryside



Base: Overnight Marketable Trips

*% Rating Factor As Very Important**



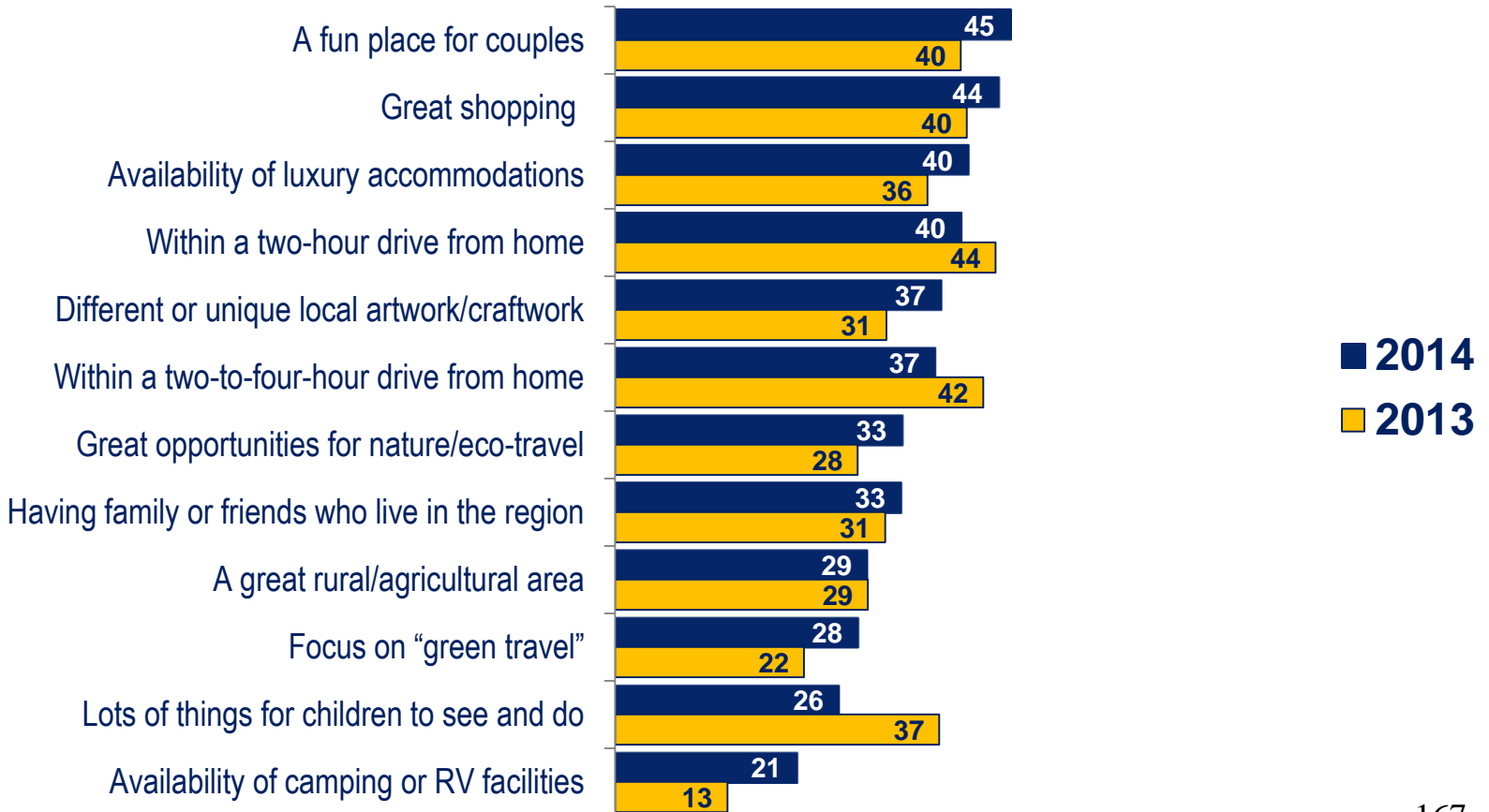
* Rated 8, 9 or 10 on 10-pt. Importance scale

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**

Traveler Priorities



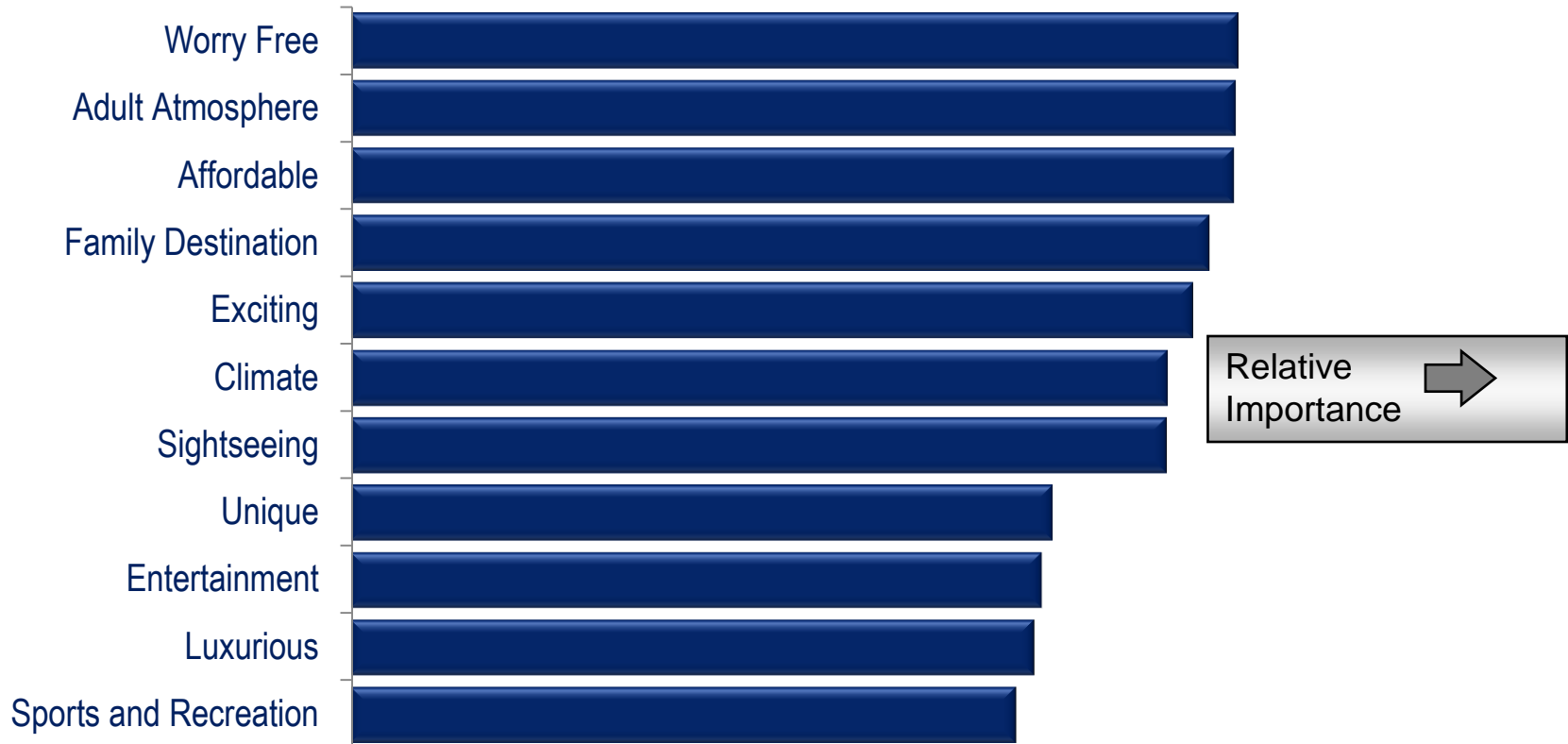
- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- The degree of association between each factor was then measured 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 Good place for families to visit

3 A good place for couples to visit

4 Good for adult vacation/getaway

5 A place I would feel welcome

6 Good place to get away and relax

7 Lots to see and do

8 Well-known landmarks

9 Safe place to travel in tourist areas

10 Must-see destination

11 Great value for the money

12 Exciting destination

13 Beautiful gardens and parks

14 Excellent State/National Parks

15 Interesting small towns/villages

16 Very affordable vacation destination

Product Delivery



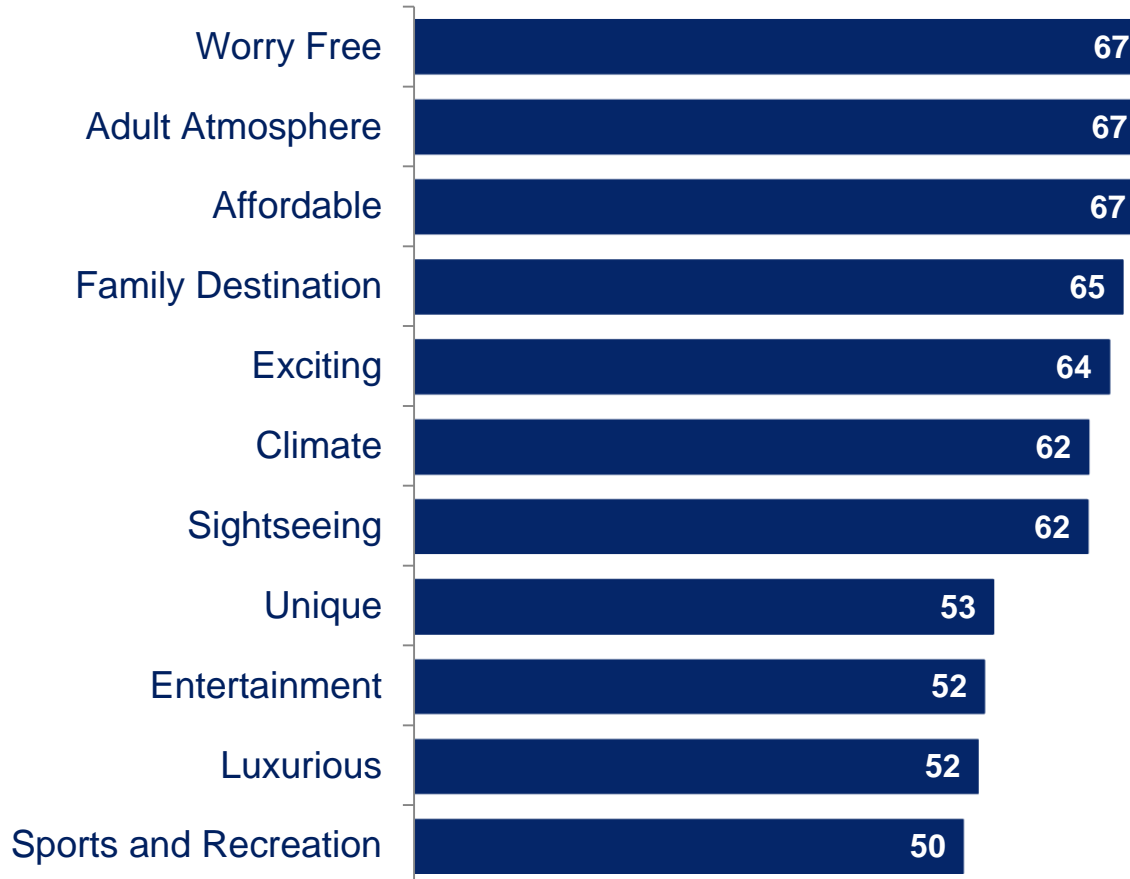
- Image ratings by recent visitors can be viewed as product ratings such that recent visitors are, presumably, rating Pennsylvania based on their personal experience.
- Pennsylvania's image strengths among recent visitors include safety, proximity, affordability, beautiful scenery, a good place for adults and families to visit and its history. Pennsylvania is also seen as a fun, relaxing, welcoming place with lots to see and do.

Pennsylvania's Product Delivery



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Exciting



Base: Overnight Marketable Trips

Percent Who Strongly Agree

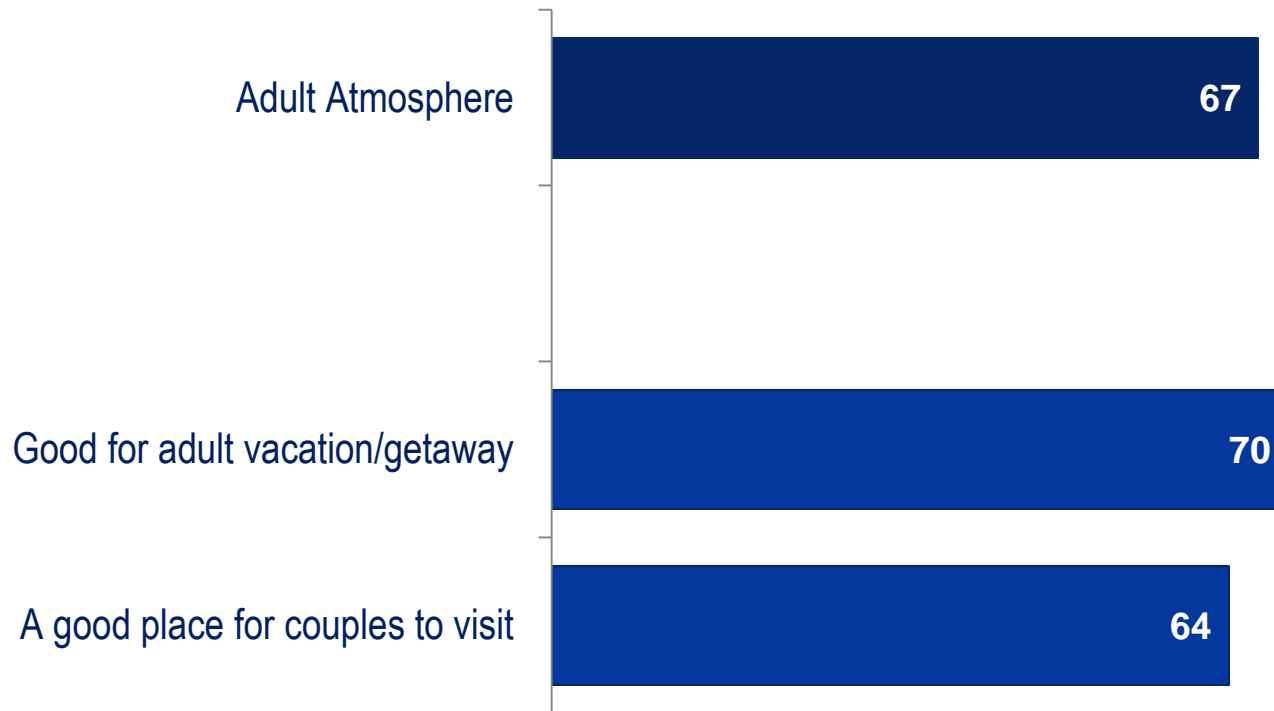


Pennsylvania's Product Delivery — Adult Atmosphere



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Worry Free



Base: Overnight Marketable Trips

Percent Who Strongly Agree

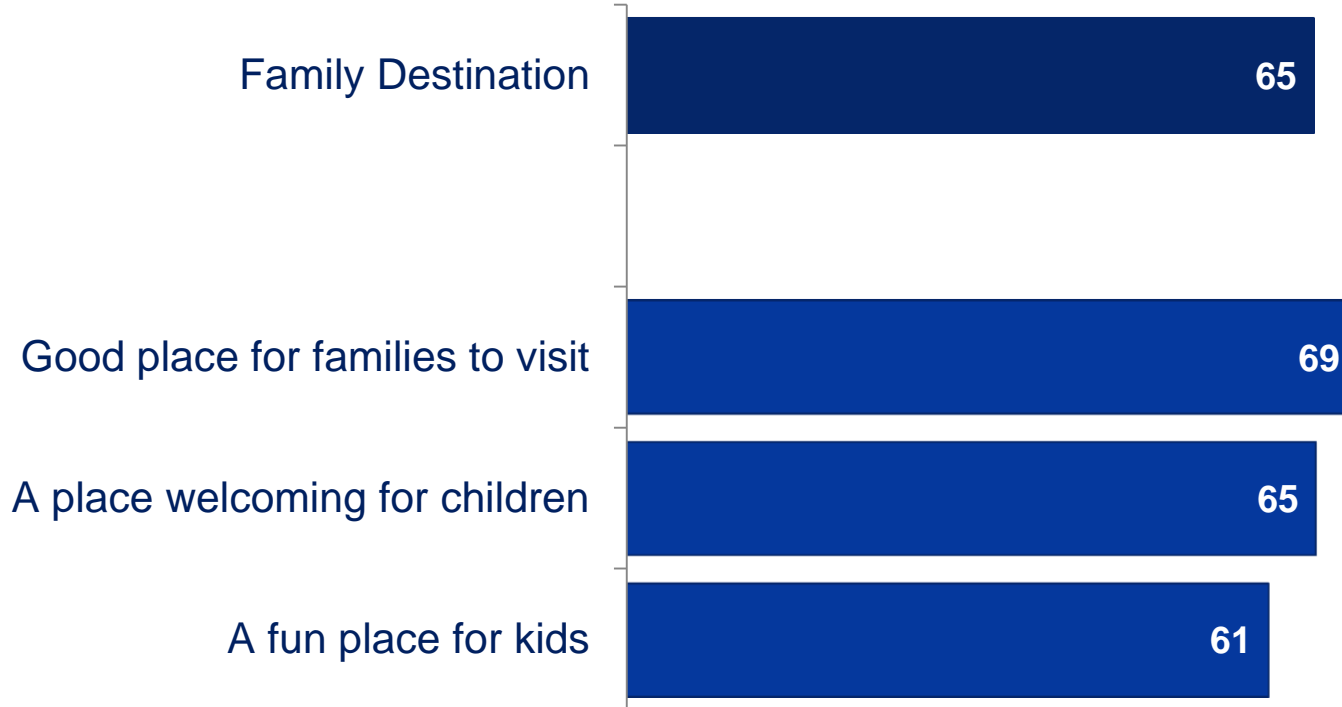


Pennsylvania's Product Delivery — Family Destination



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Sightseeing



Base: Overnight Marketable Trips

Percent Who Strongly Agree



Pennsylvania's Product Delivery — Affordable



Base: Overnight Marketable Trips

Percent Who Strongly Agree

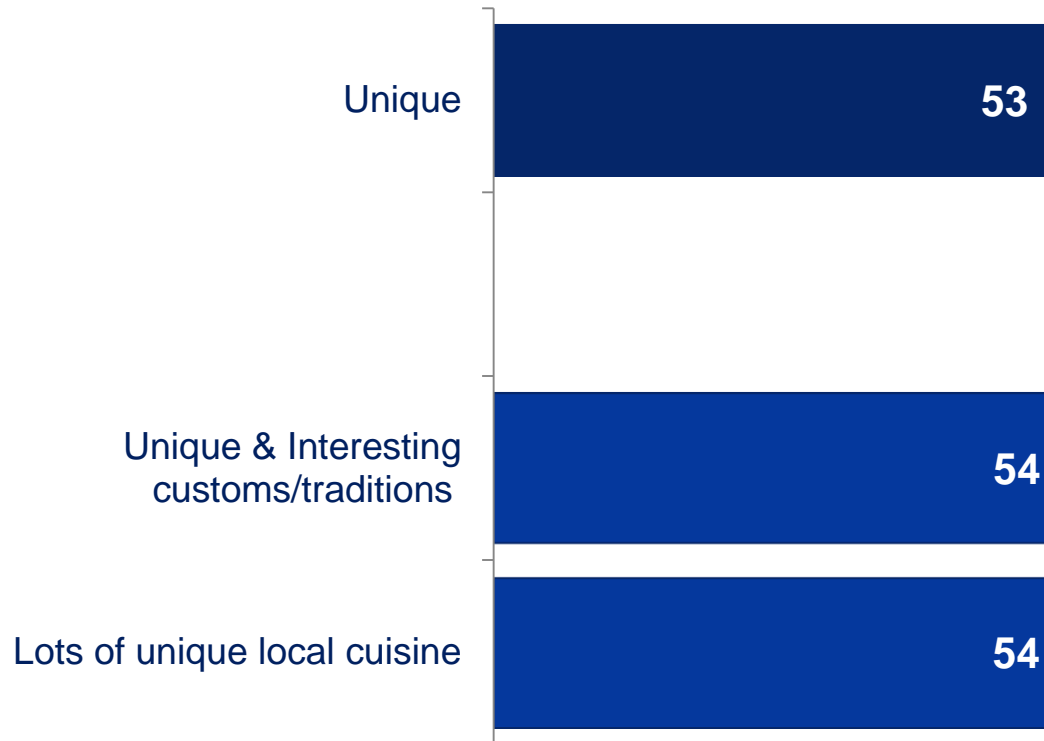


Pennsylvania's Product Delivery — Unique



Base: Overnight Marketable Trips

Percent Who Strongly Agree

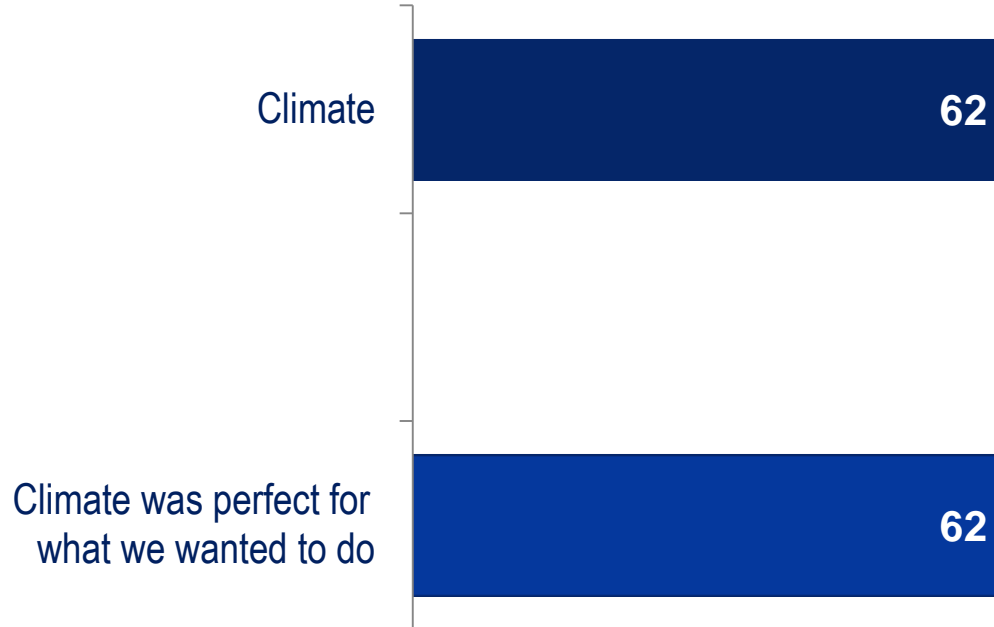


Pennsylvania's Product Delivery — Climate



Base: Overnight Marketable Trips

Percent Who Strongly Agree

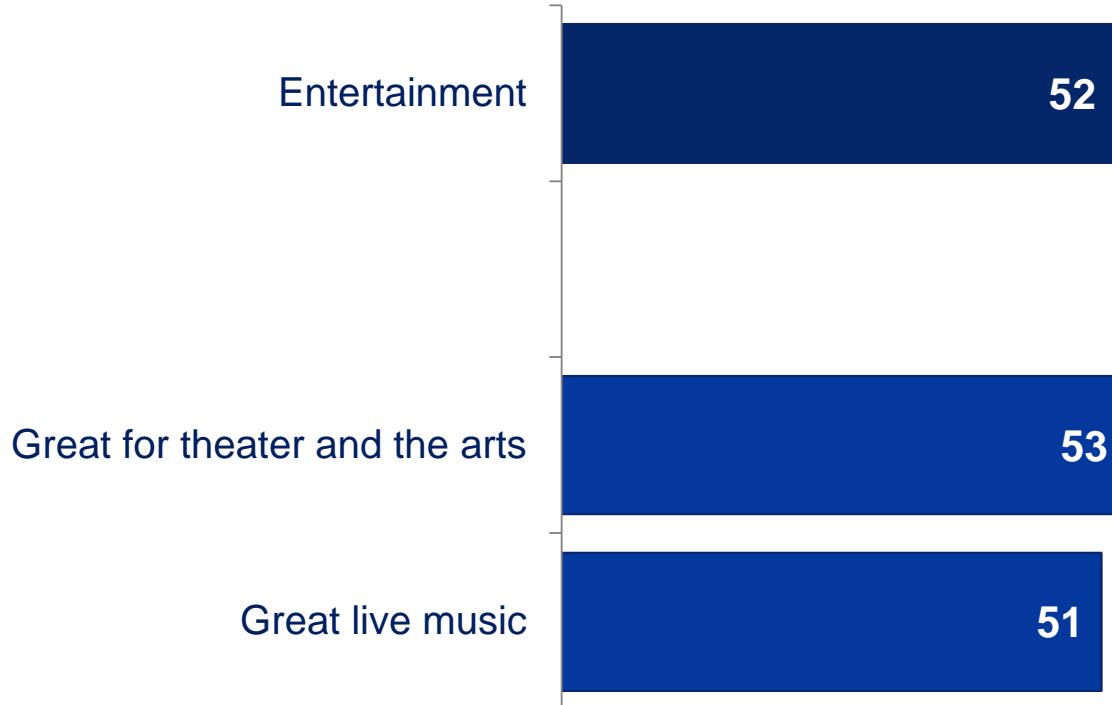


Pennsylvania's Product Delivery — Entertainment



Base: Overnight Marketable Trips

Percent Who Strongly Agree

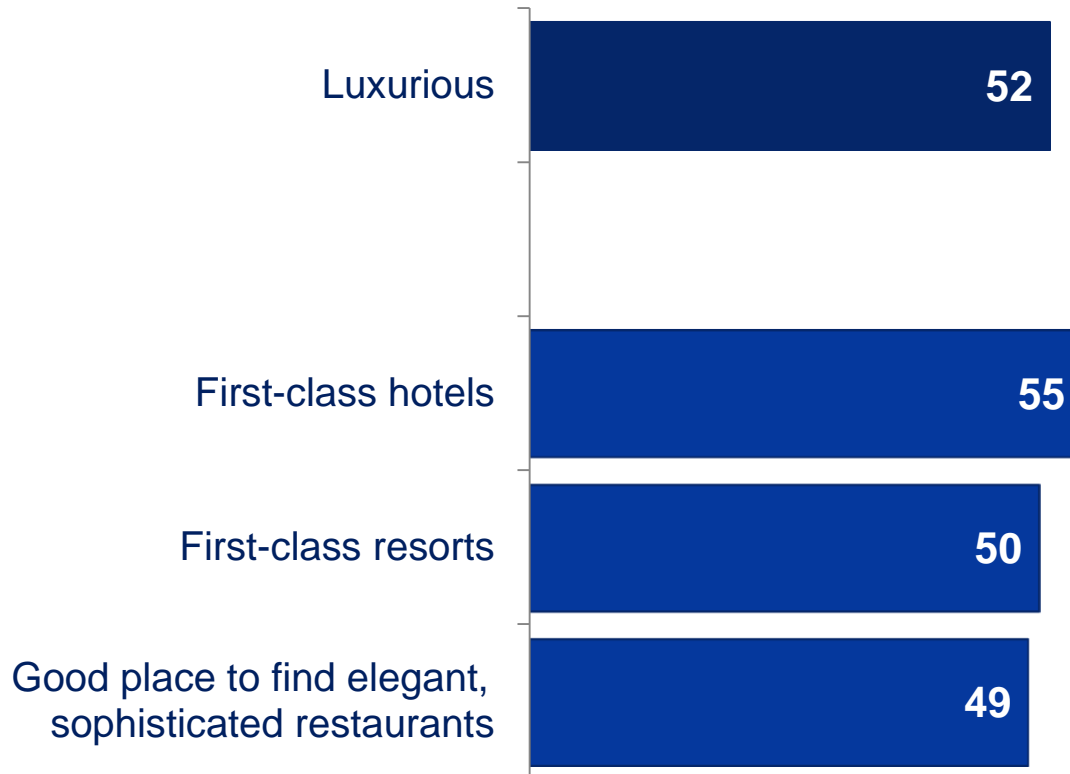


Pennsylvania's Product Delivery — Luxurious



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

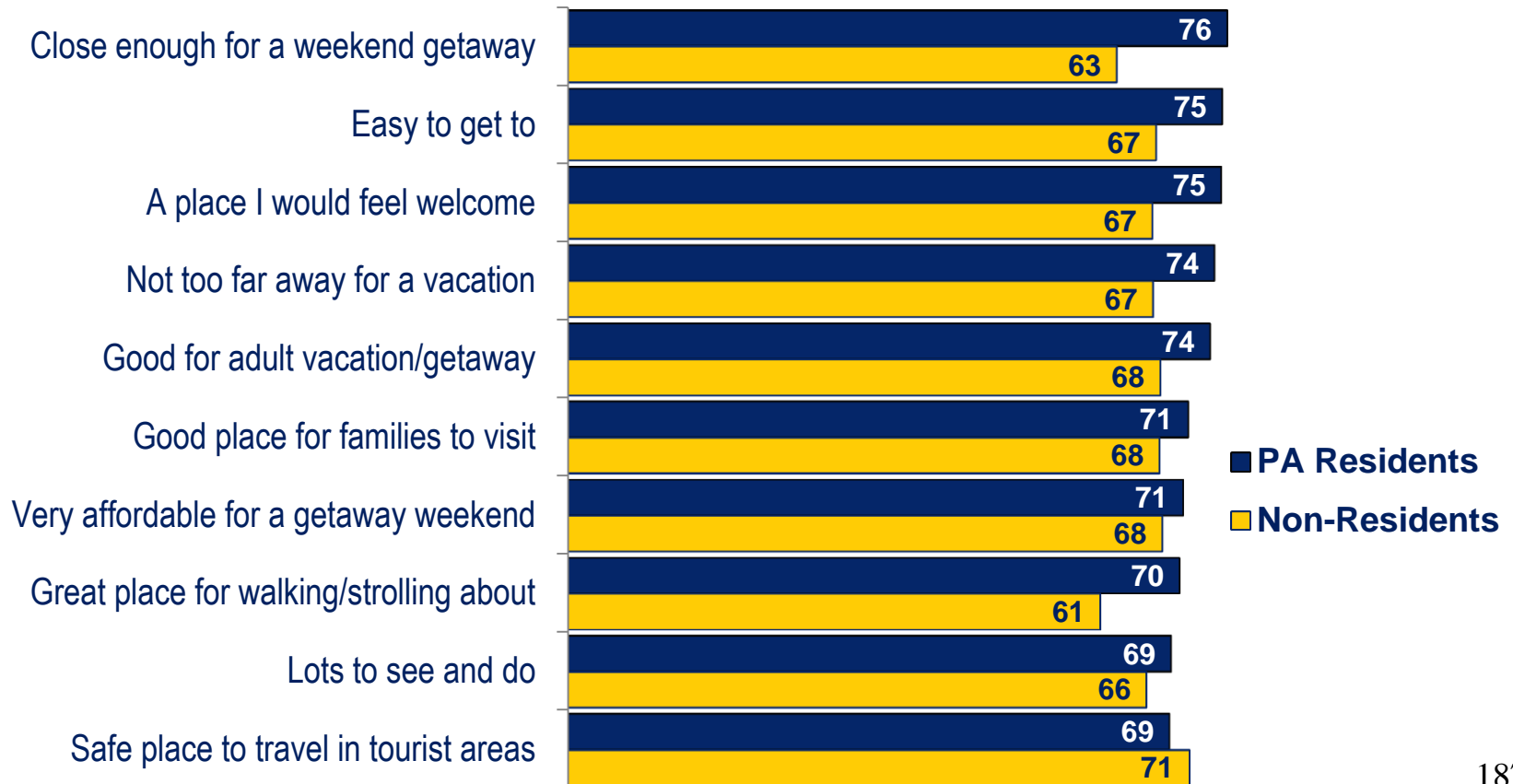


Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents



Base: Overnight Marketable Trips

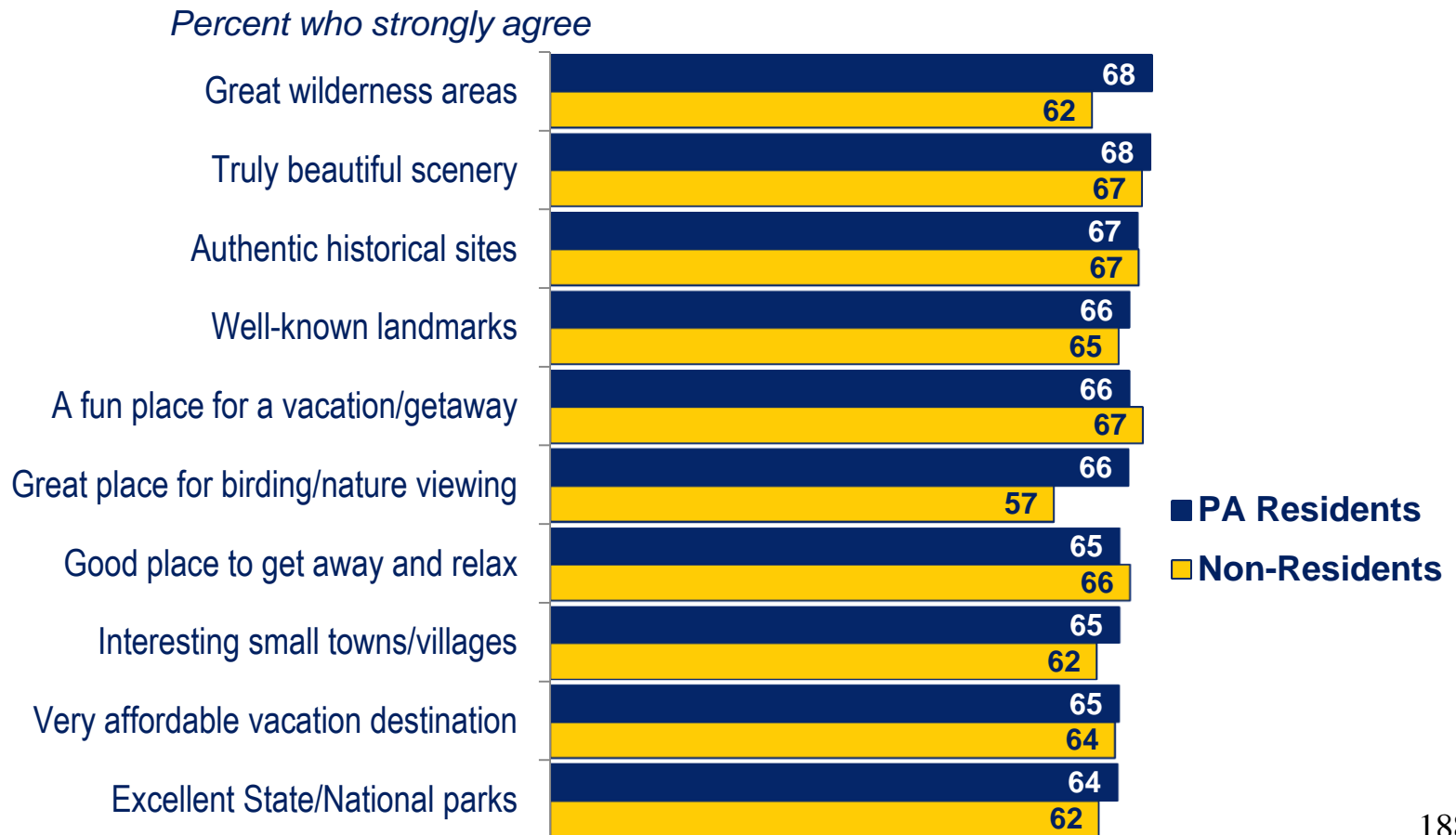
Percent who strongly agree



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



Base: Overnight Marketable Trips



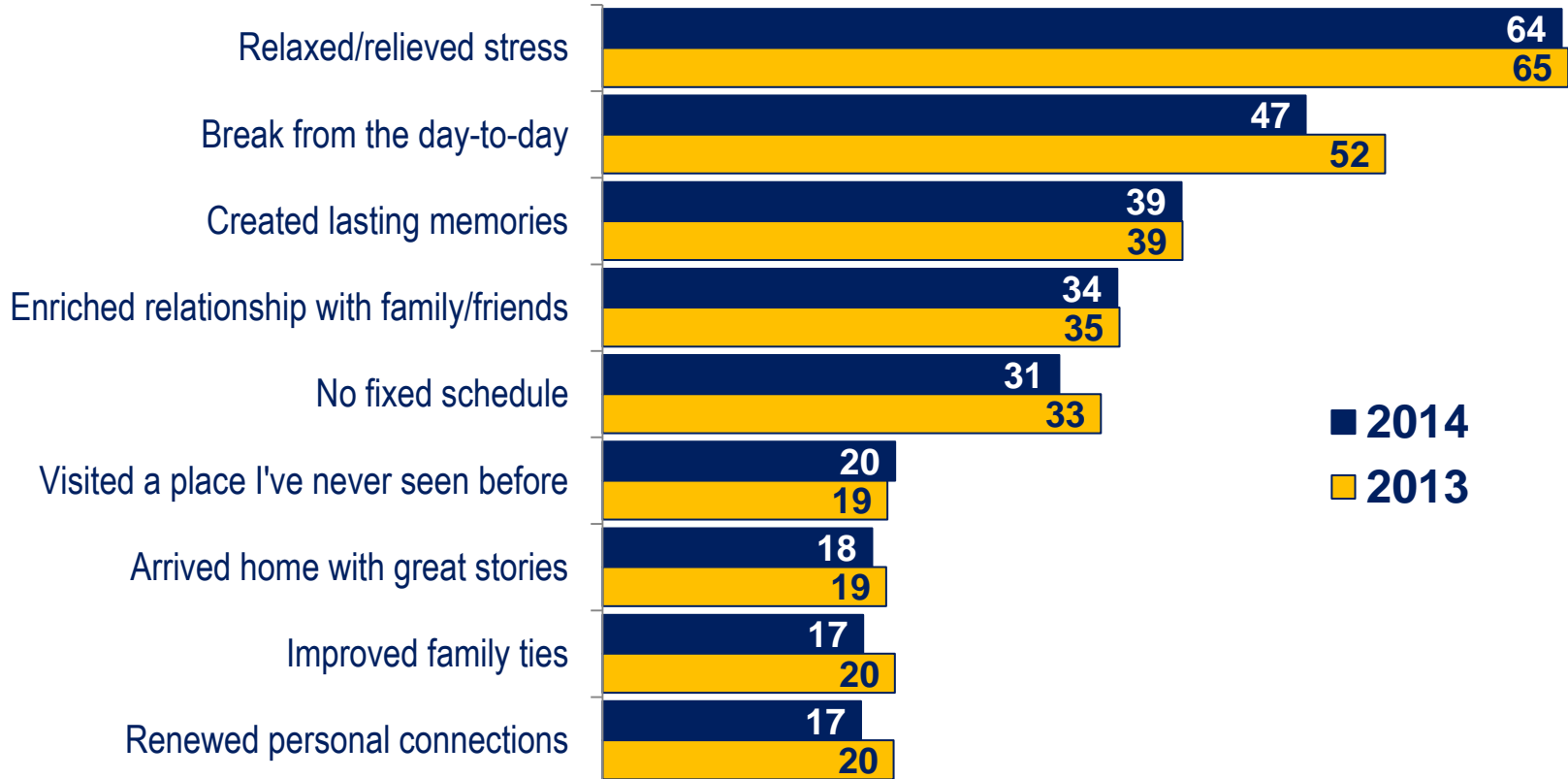
Trip Benefits — Marketable Overnight Trips

Benefits From Pennsylvania Overnight Trip



Base: Overnight Marketable Trips

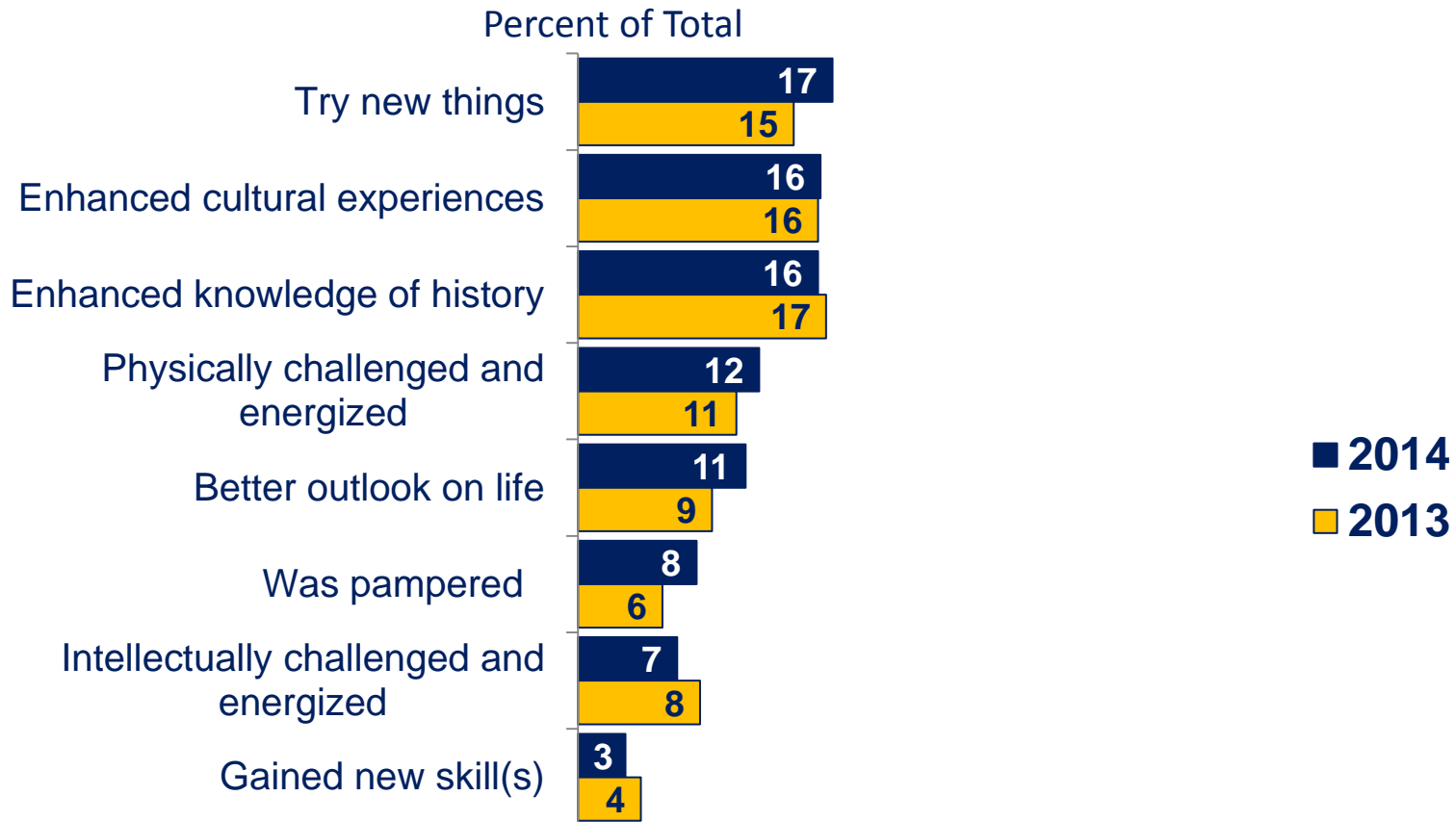
Percent of Total



Benefits From Pennsylvania Overnight Trip (Cont'd)



Base: Overnight Marketable Trips



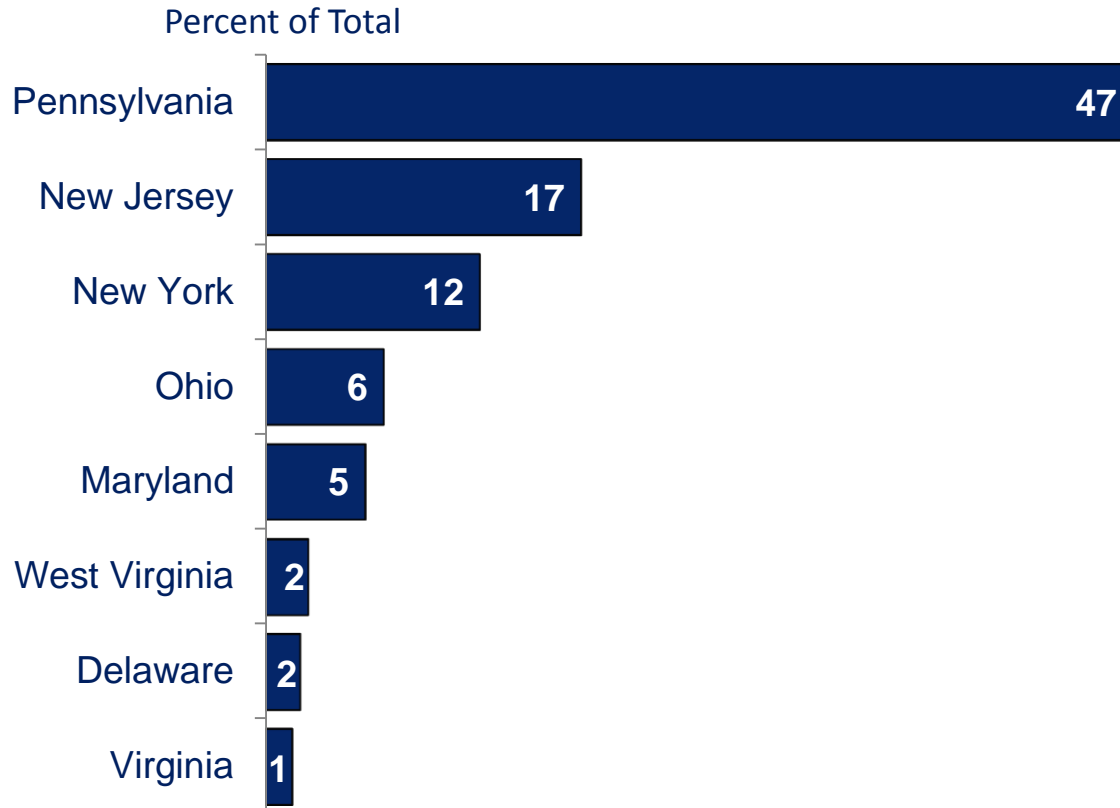
Pennsylvania Day-Trips

Origin Markets — Pennsylvania Day-Trips

State Origin Markets – Marketable Day-Trips



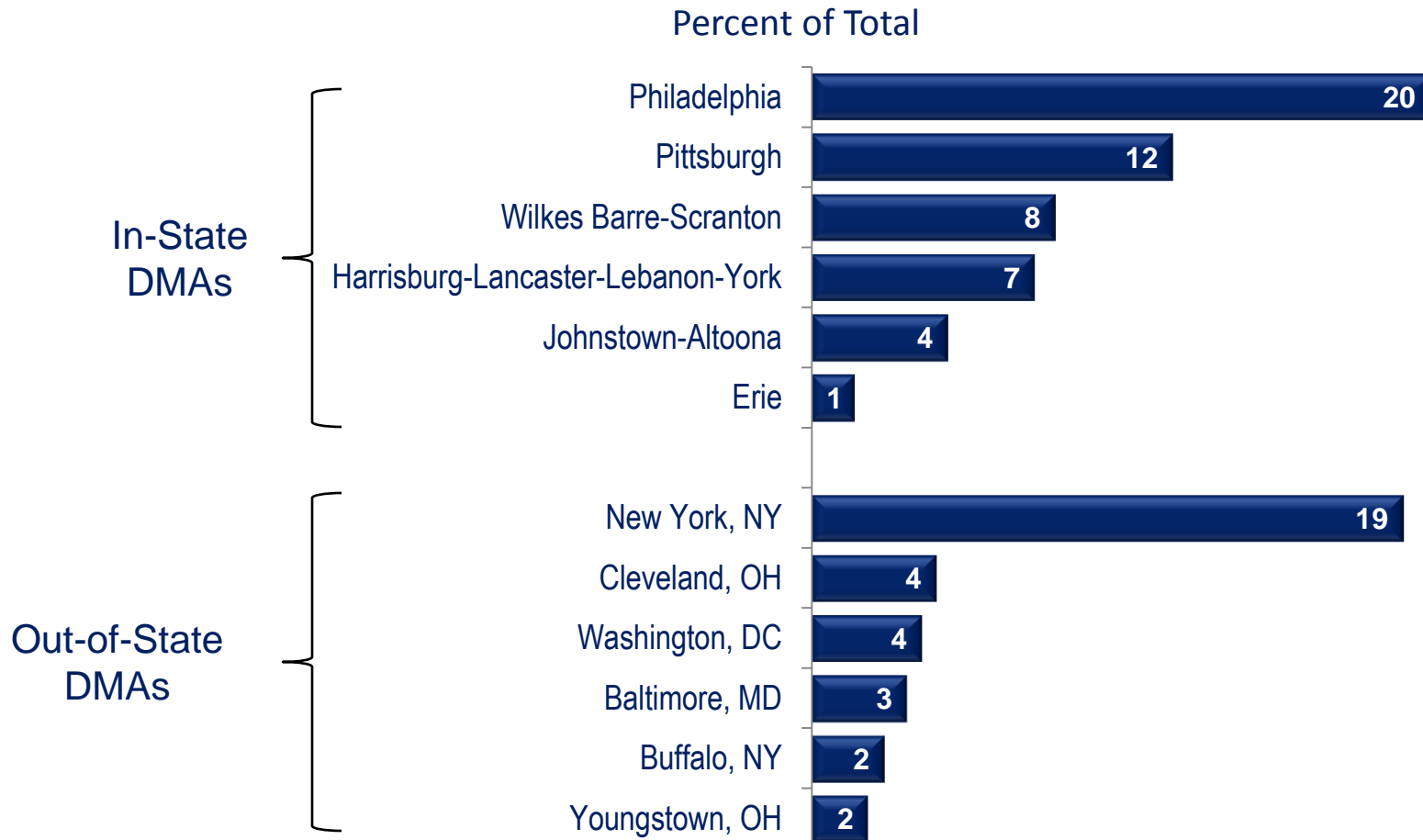
Base: Marketable Day-Trips



Urban Origin Markets – Marketable Day-Trips



Base: Marketable Day-Trips

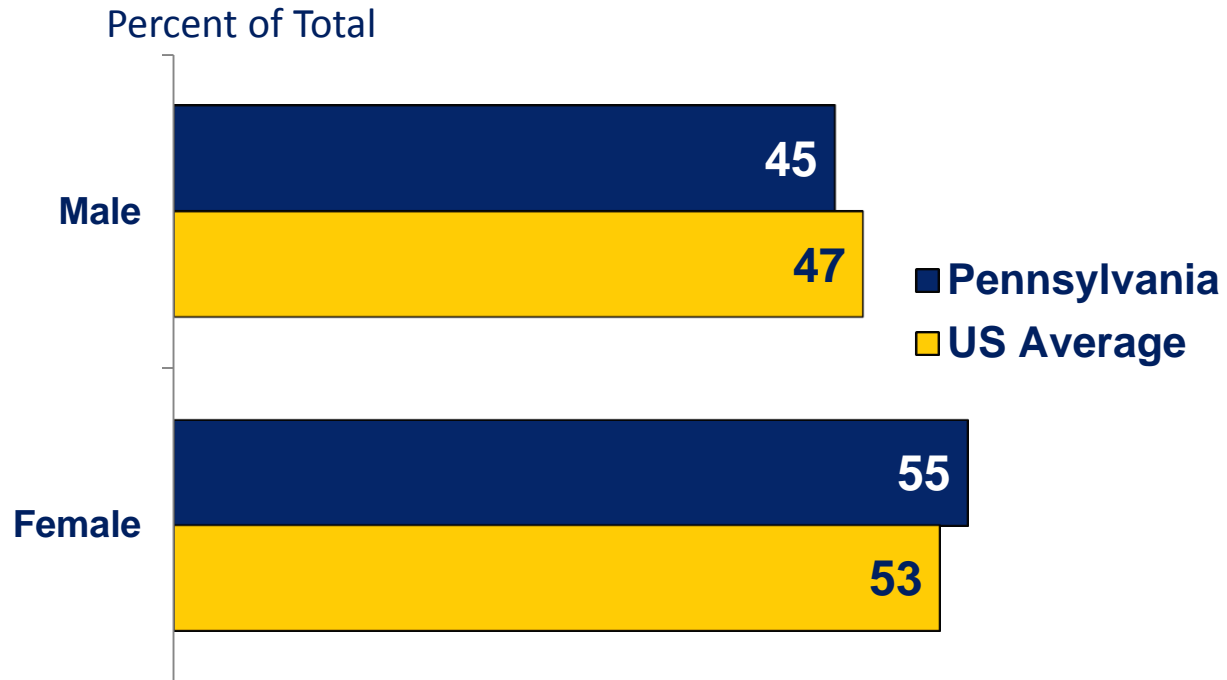


Traveler Profile — Marketable Day-Trips

Gender



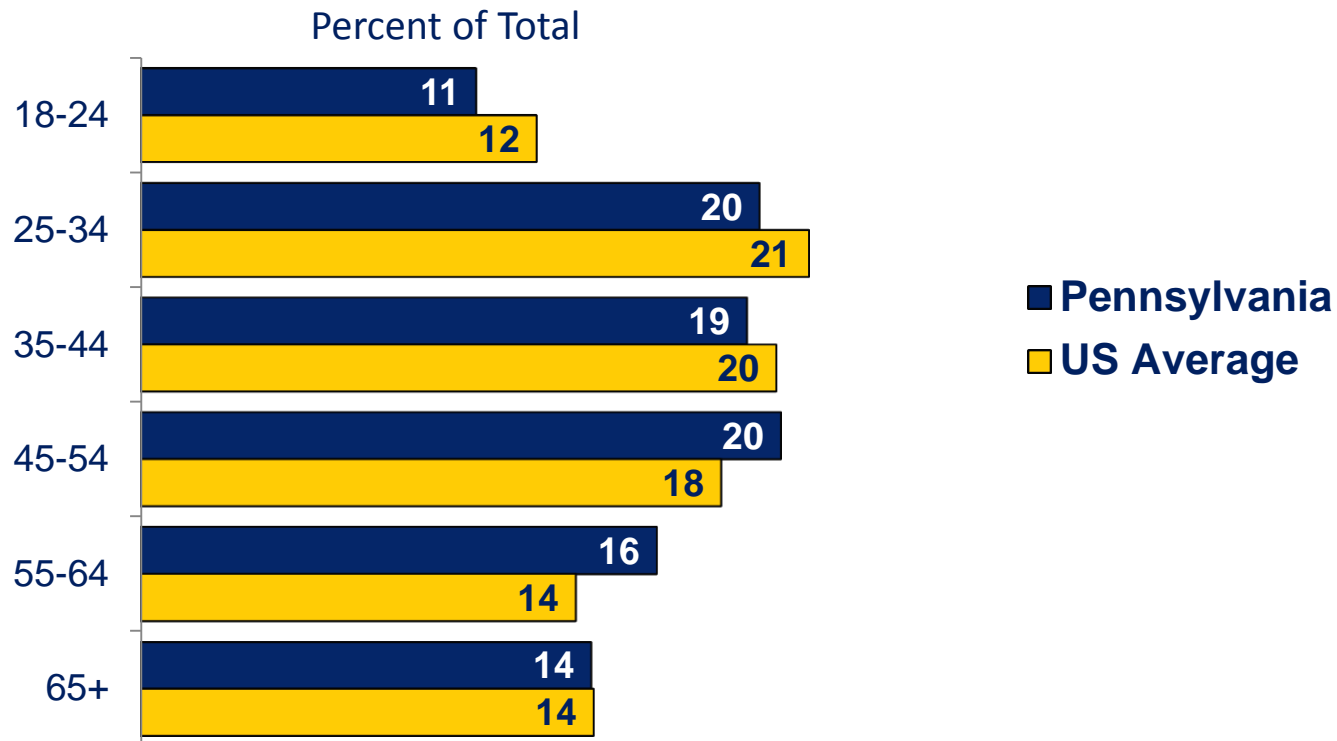
Base: Marketable Day-Trips



Age



Base: Marketable Day-Trips



Average

Average Age

Pennsylvania

45.6

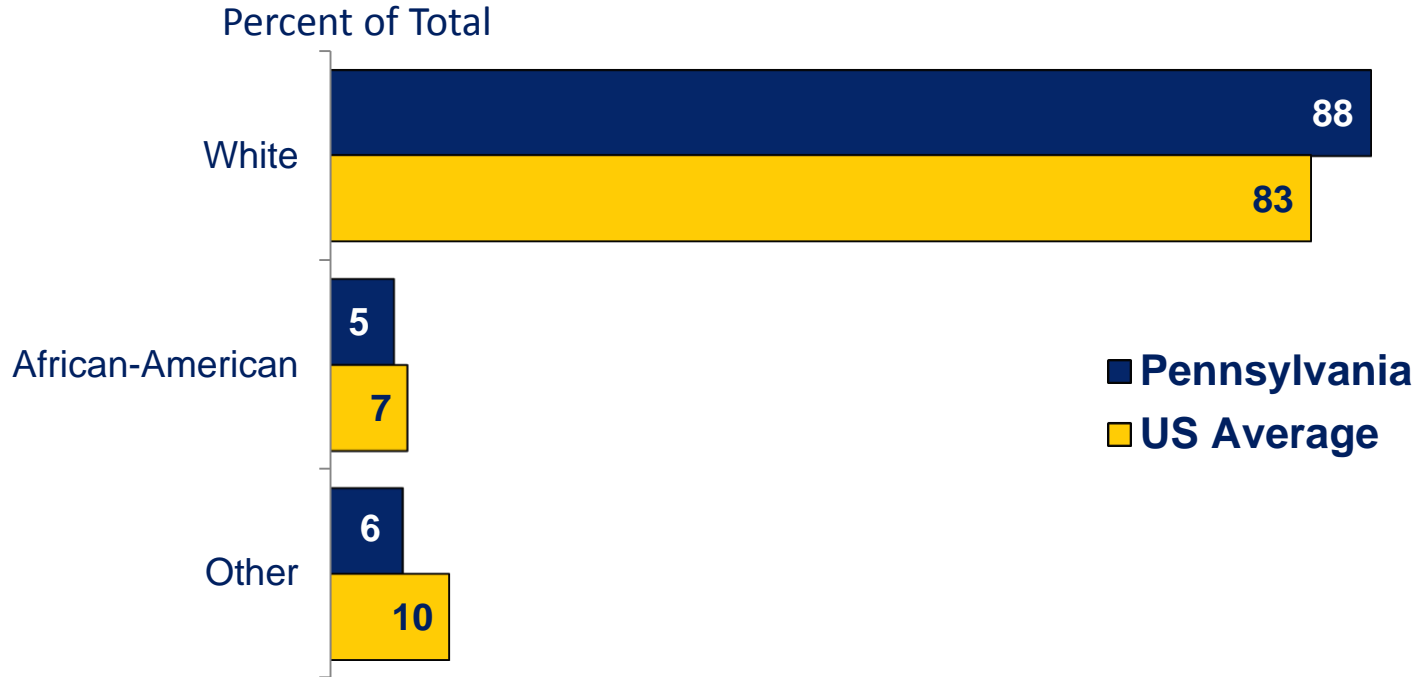
US

44.4

Race



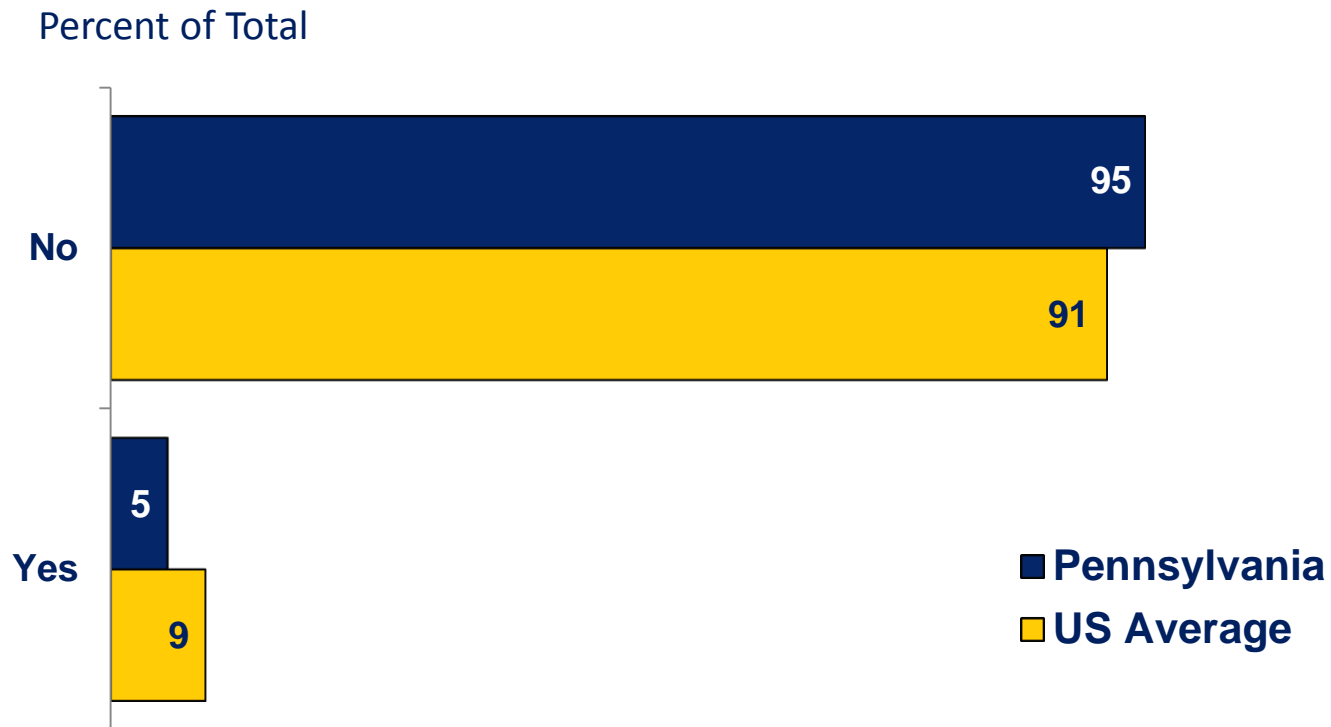
Base: Marketable Day-Trips



Hispanic Background



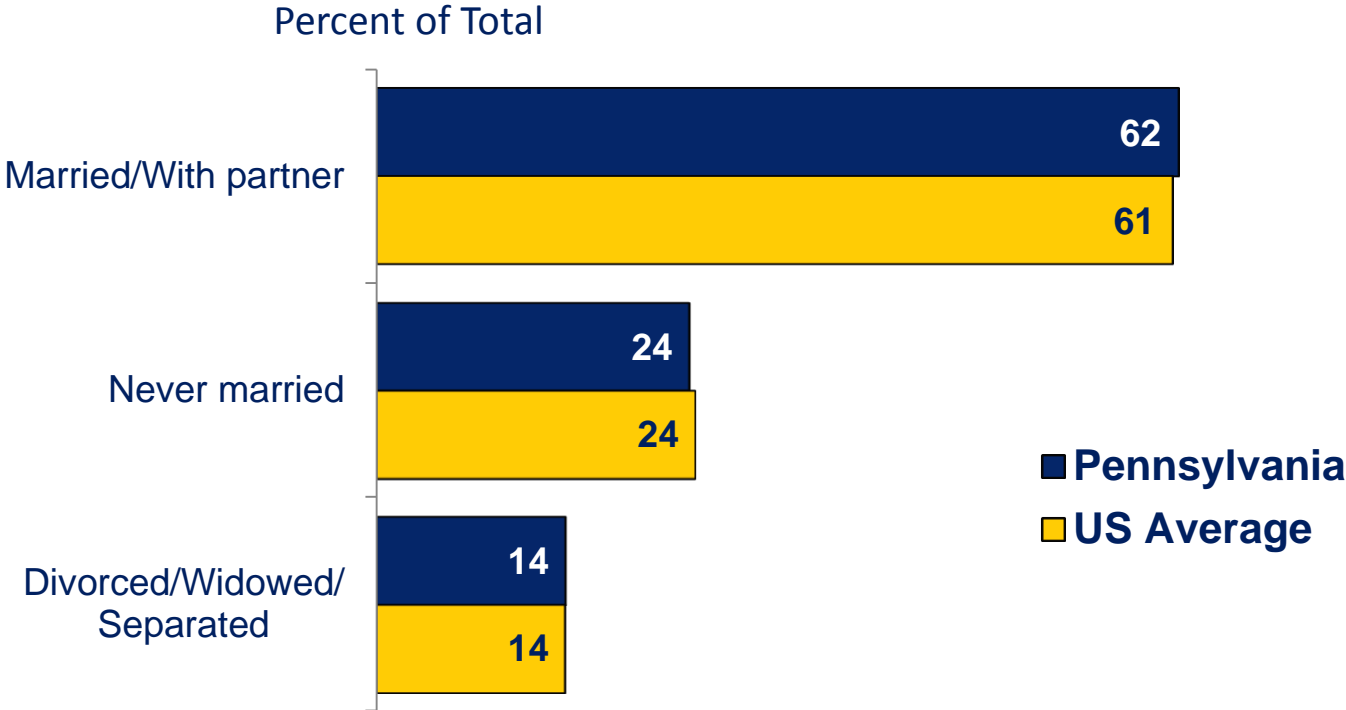
Base: Marketable Day-Trips



Marital Status



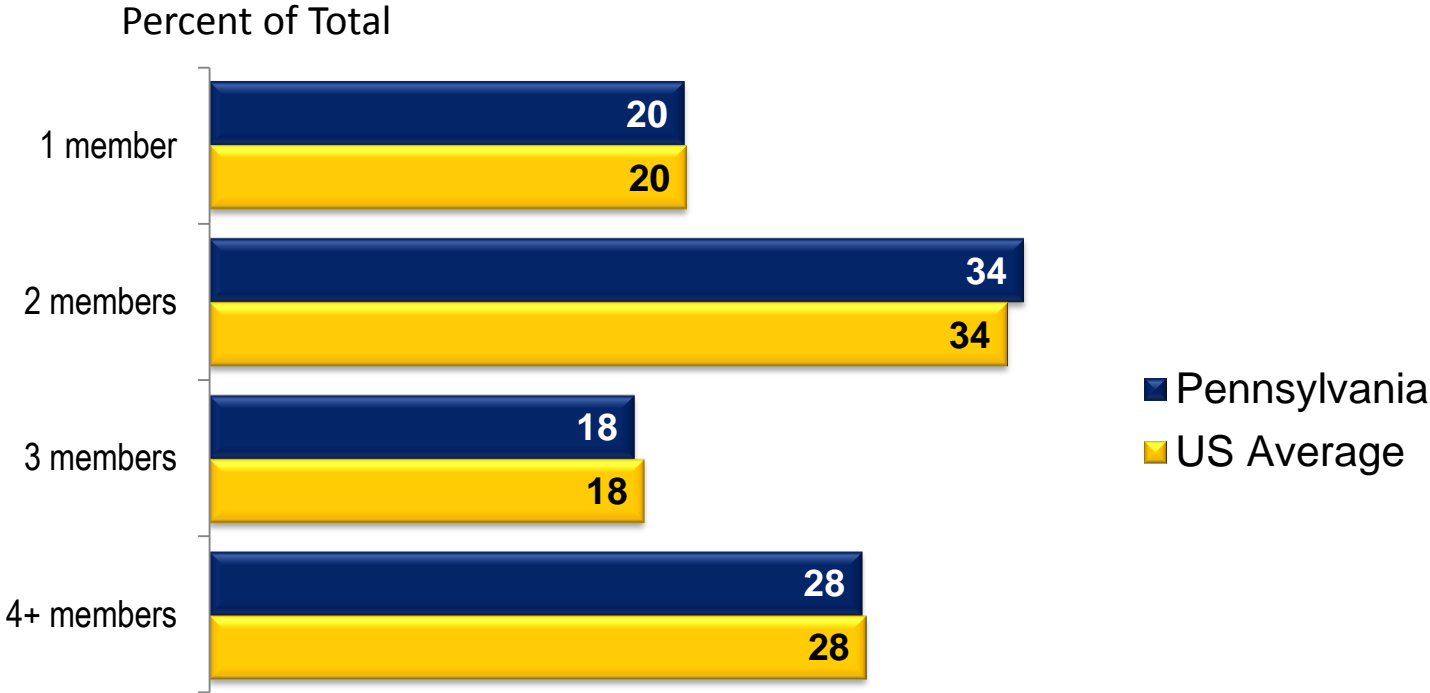
Base: Marketable Day-Trips



Household Size



Base: Marketable Day-Trips

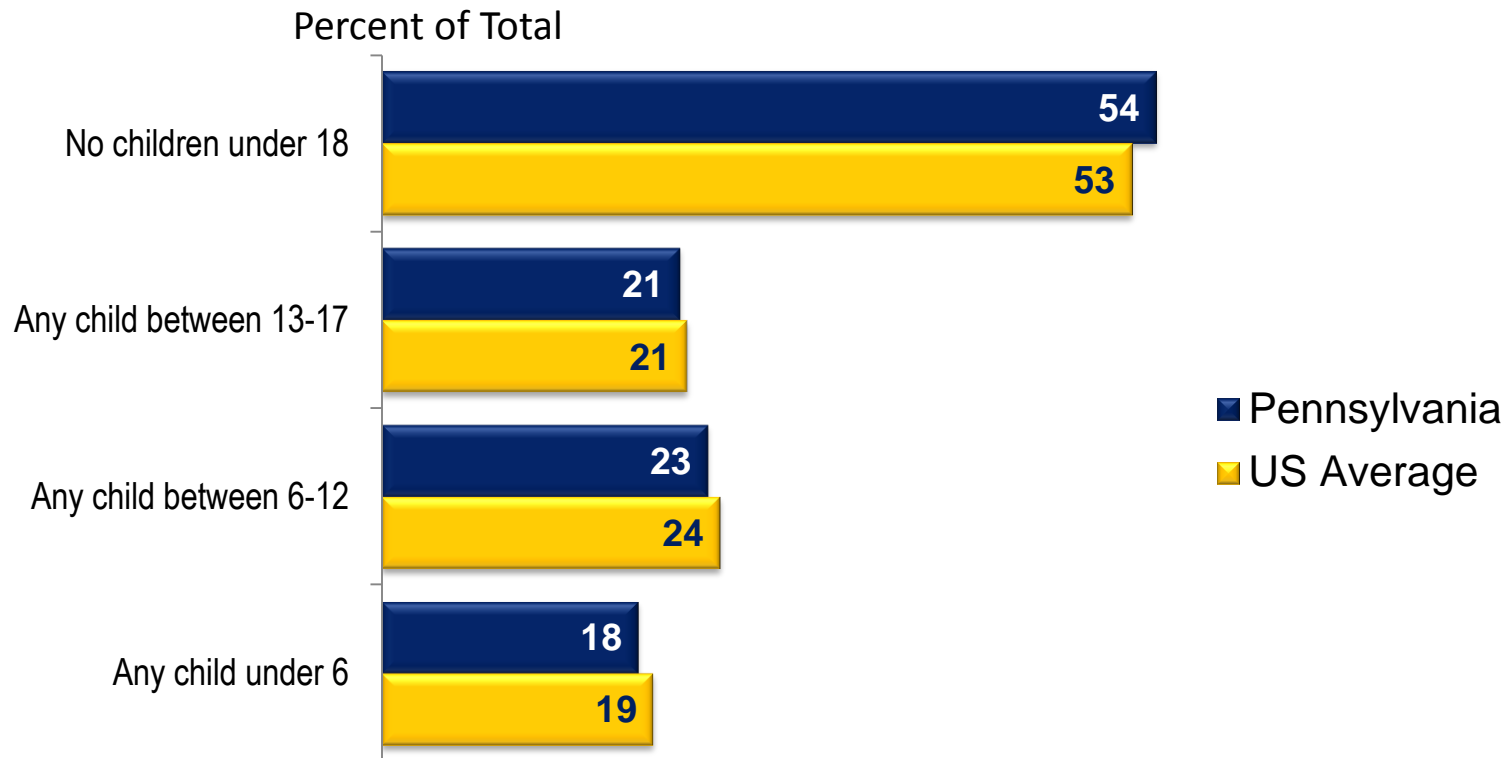


Average Household Size: Pennsylvania 2.8 United States 2.8

Children in Household



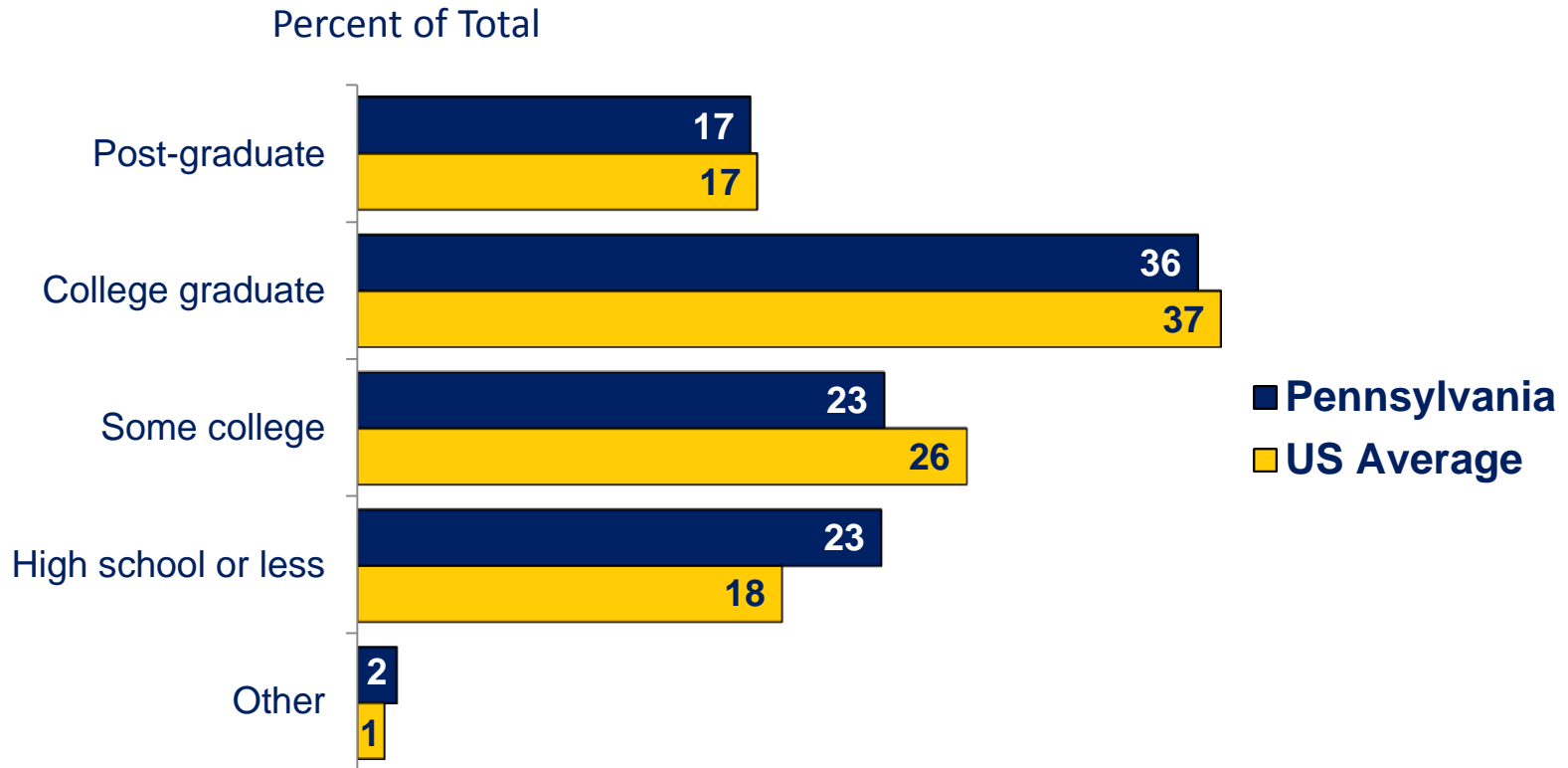
Base: Marketable Day-Trips



Education



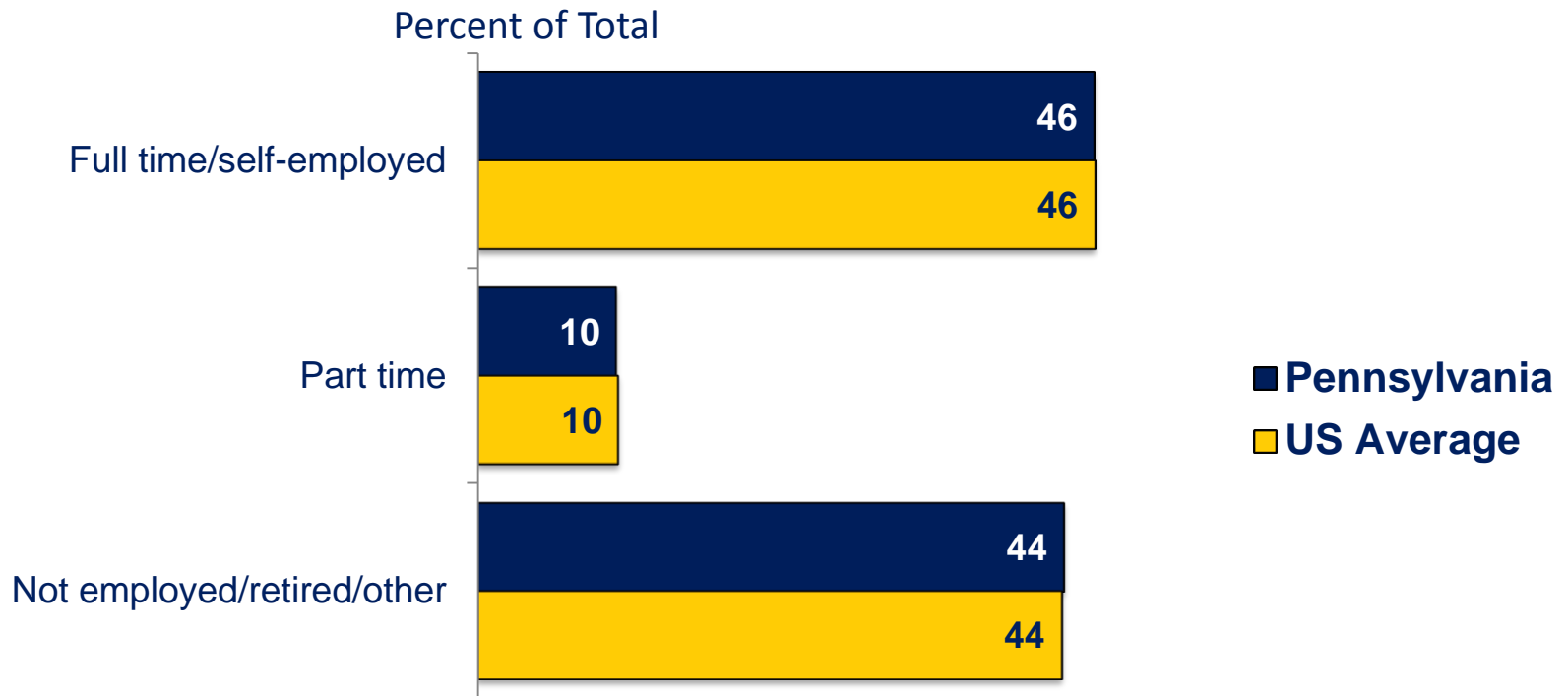
Base: Marketable Day-Trips



Employment



Base: Marketable Day-Trips

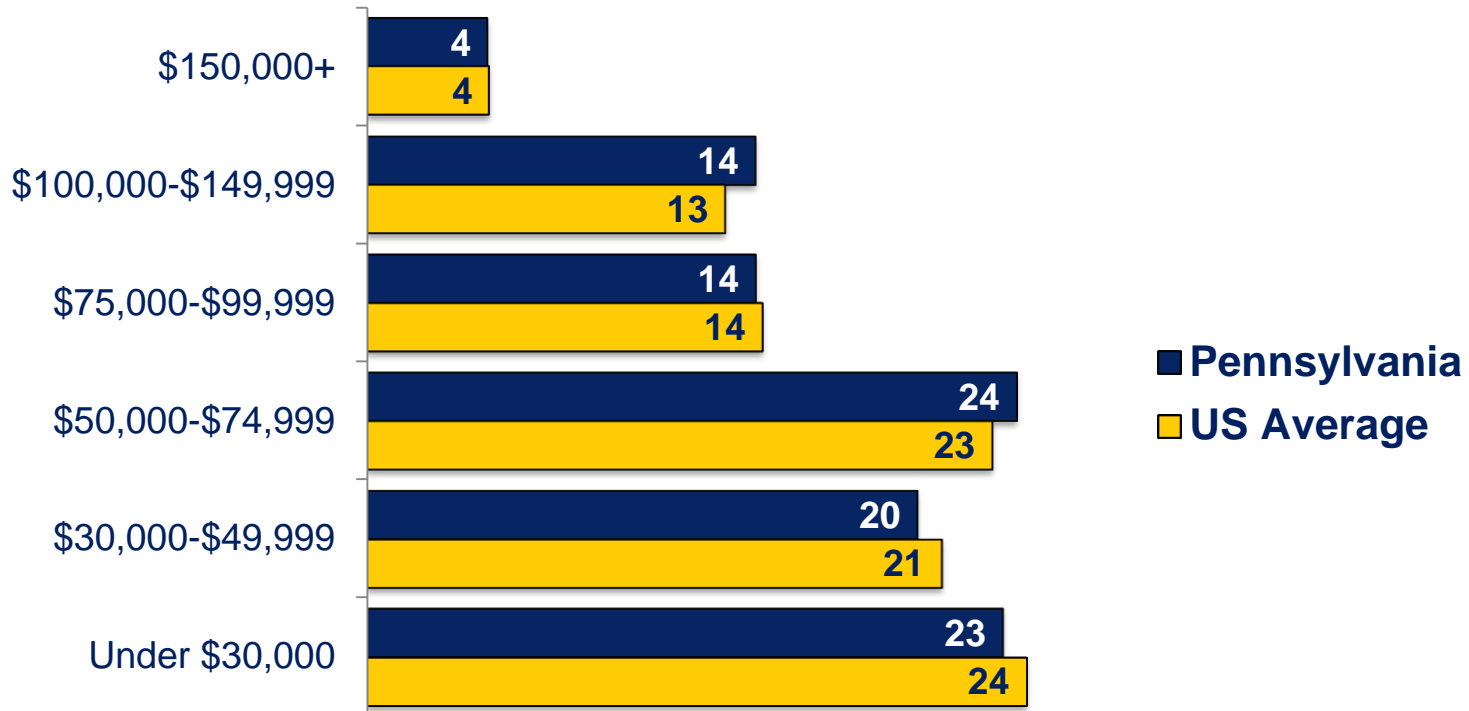


Income



Base: Marketable Day-Trips

Percent of Total

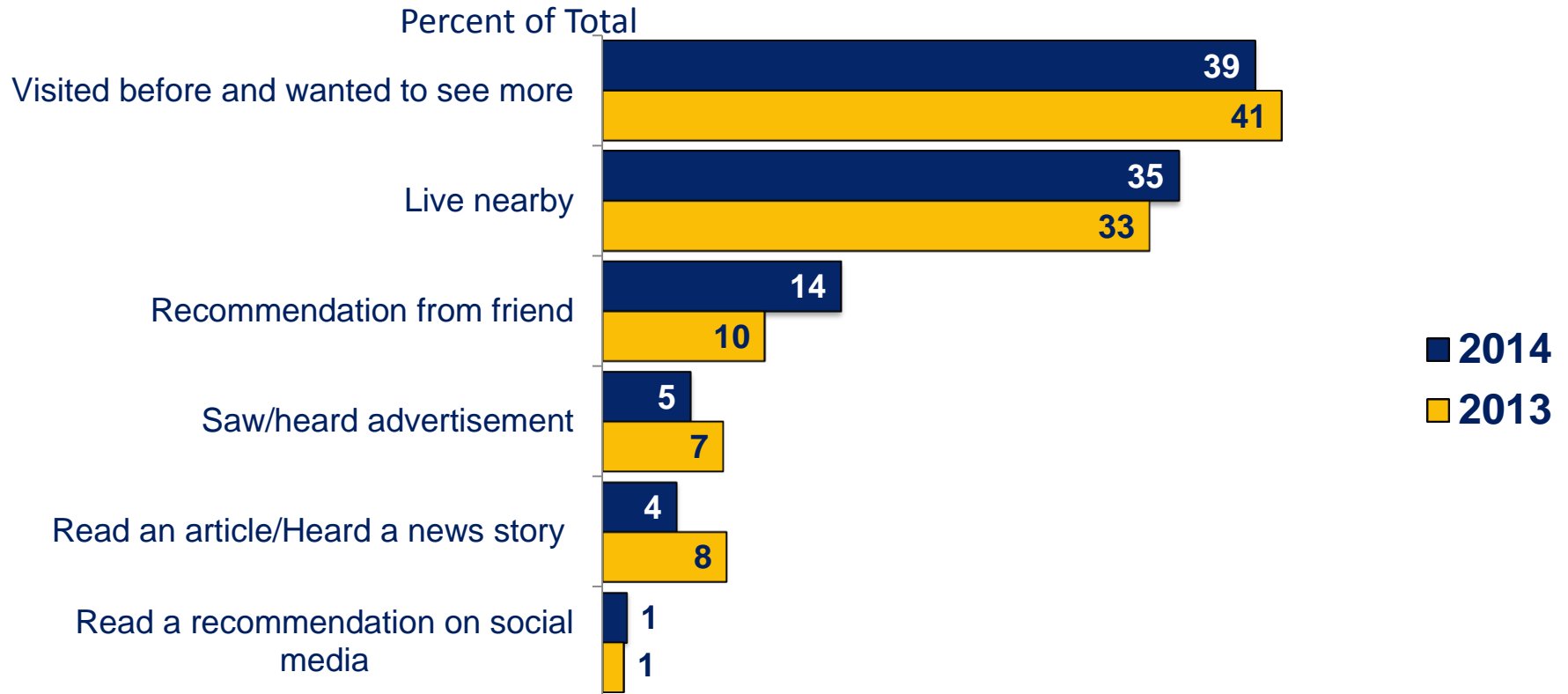


Trip Planning & Booking — Marketable Day-Trips

Main Reason for Choosing Pennsylvania



Base: Marketable Day-Trips



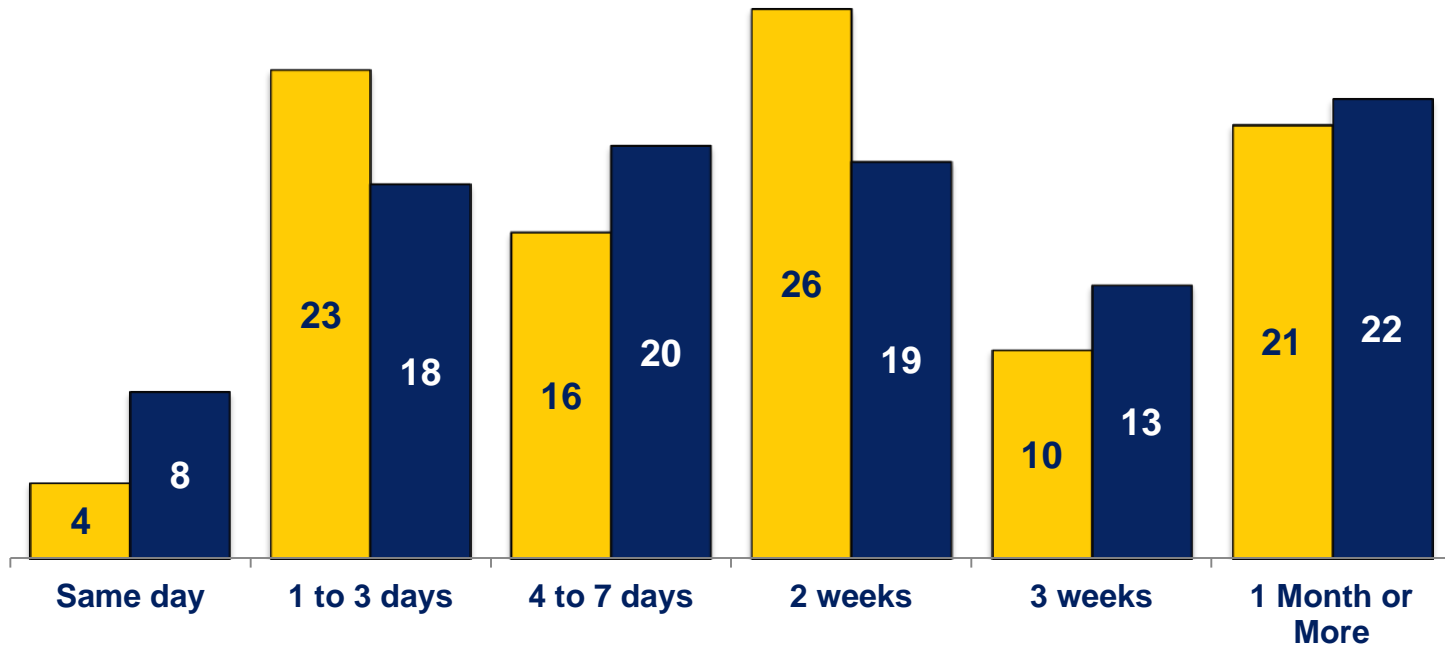
Planning Cycle



Base: Marketable Day-Trips

Percent of Total

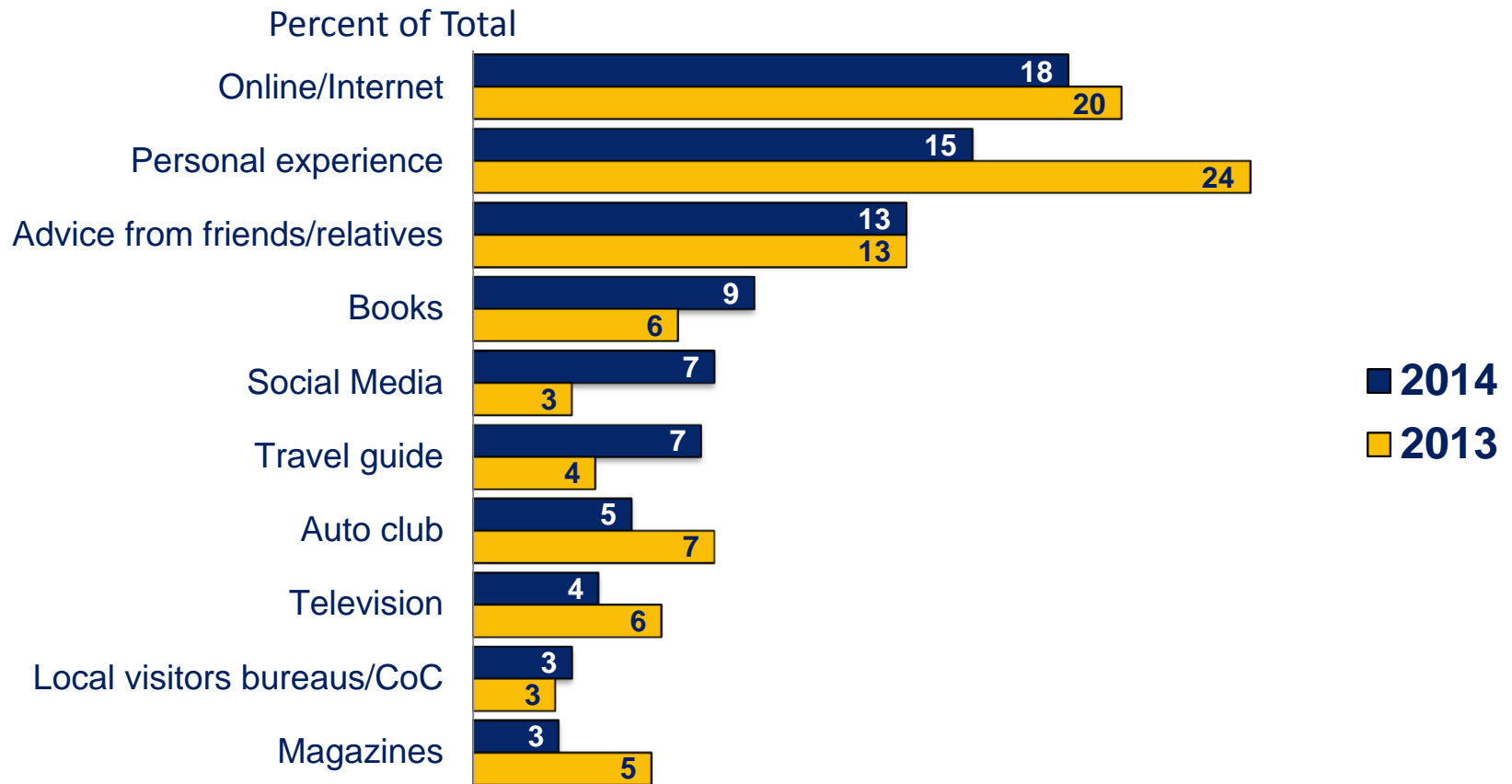
■ 2013 ■ 2014



Information Sources Used for Planning



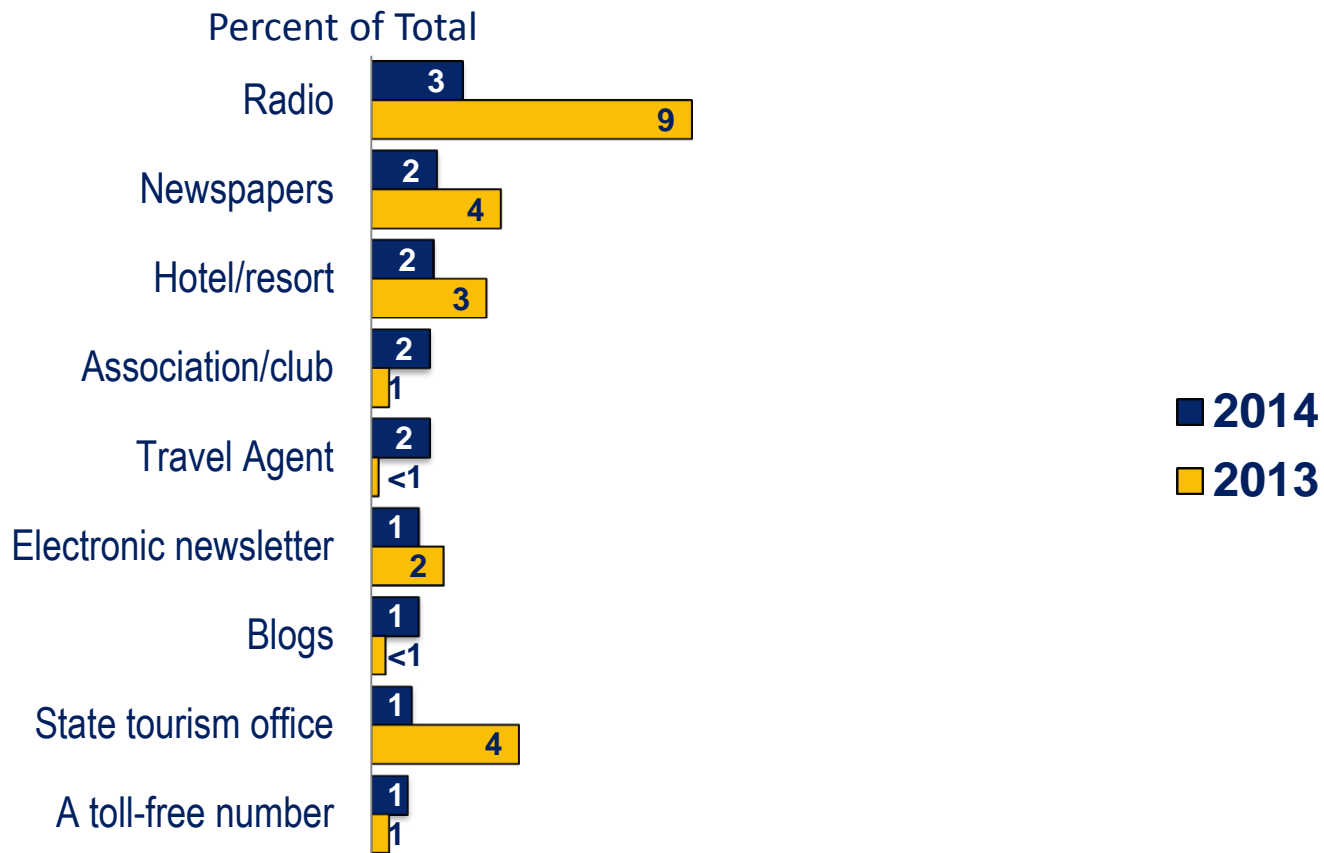
Base: Marketable Day-Trips



Information Sources Used for Planning (Cont'd)



Base: Marketable Day-Trips

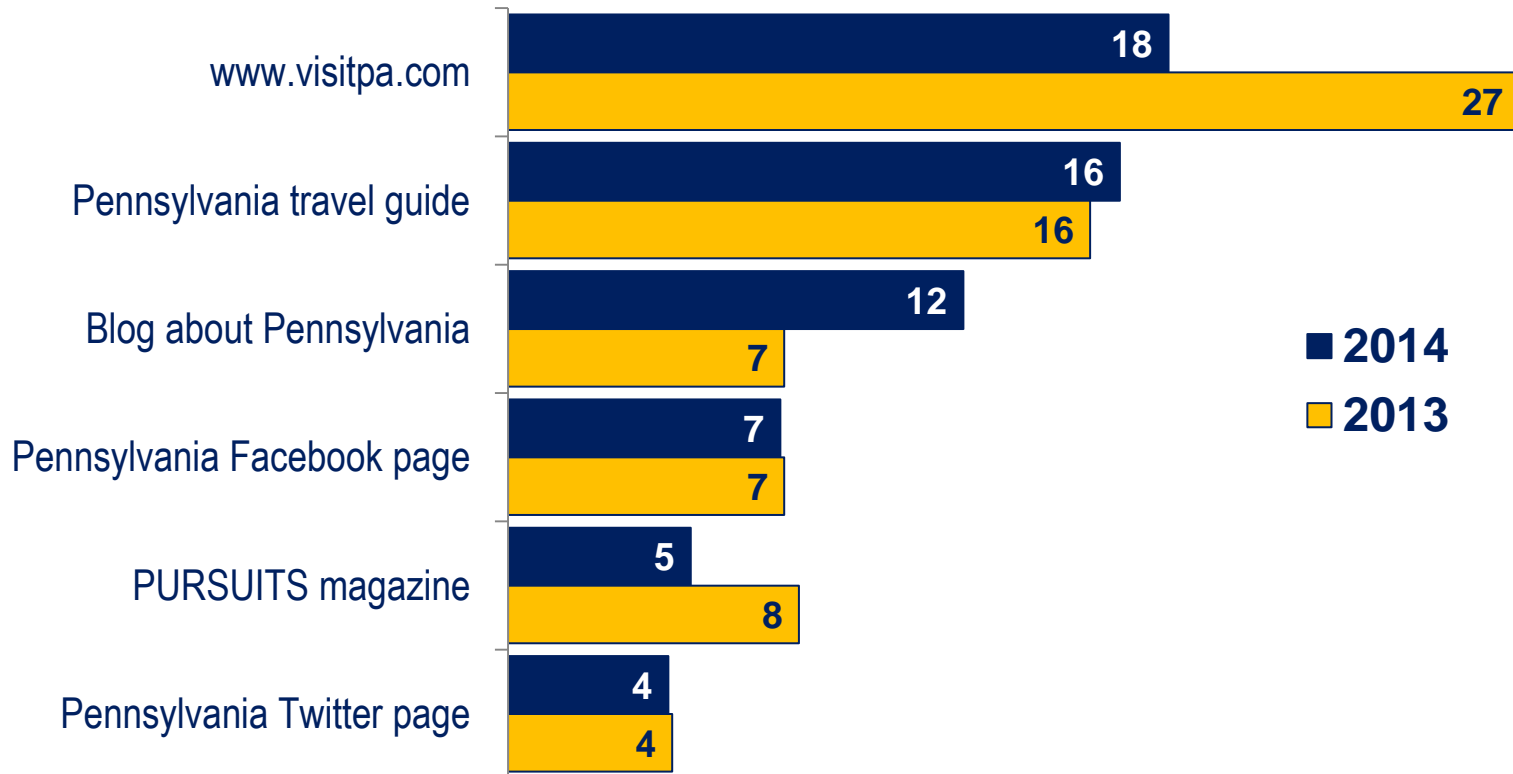


Use of Pennsylvania Trip Planning Tools



Base: Marketable Day-Trips

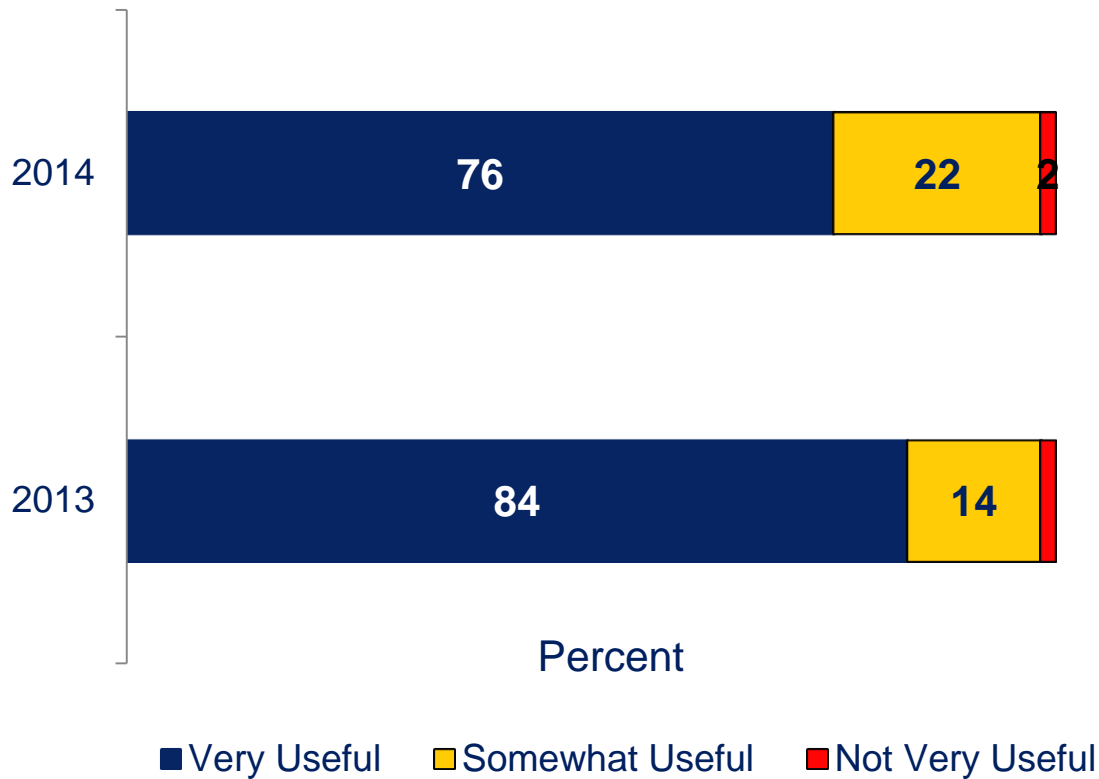
Percent of Total



www.visitpa.com Usefulness



Base: Marketable Day-Trips

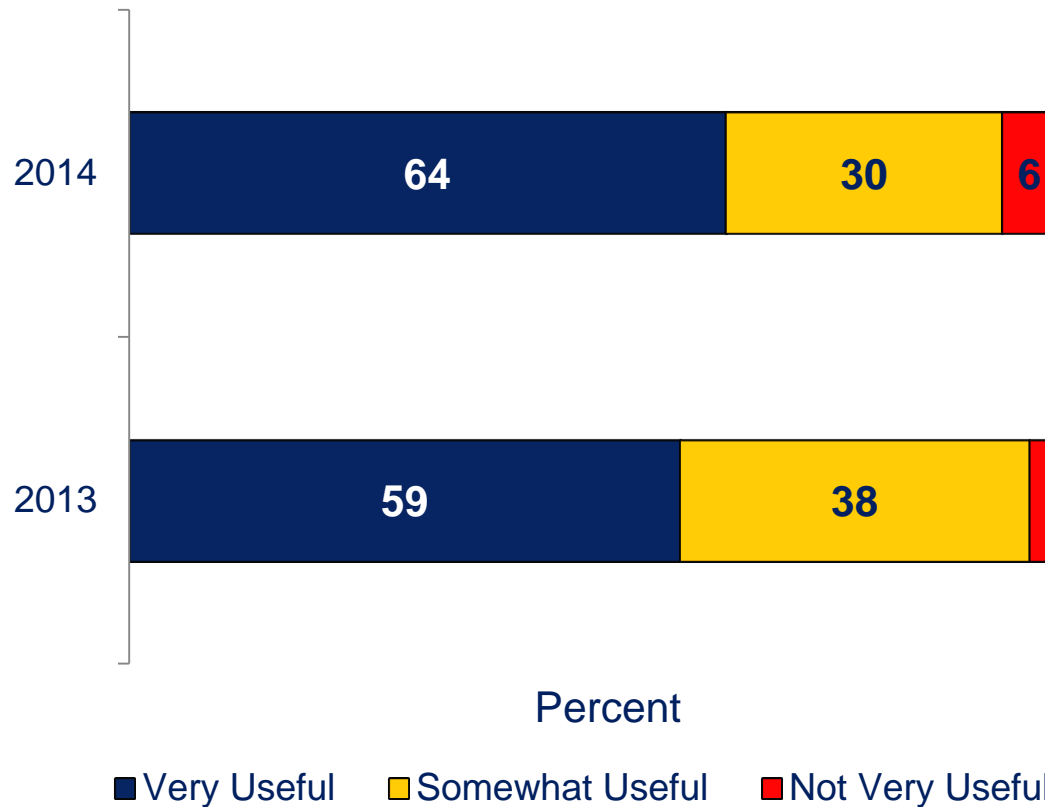


**Caution: low sample size*

Travel Guide Usefulness



Base: Marketable Day-Trips



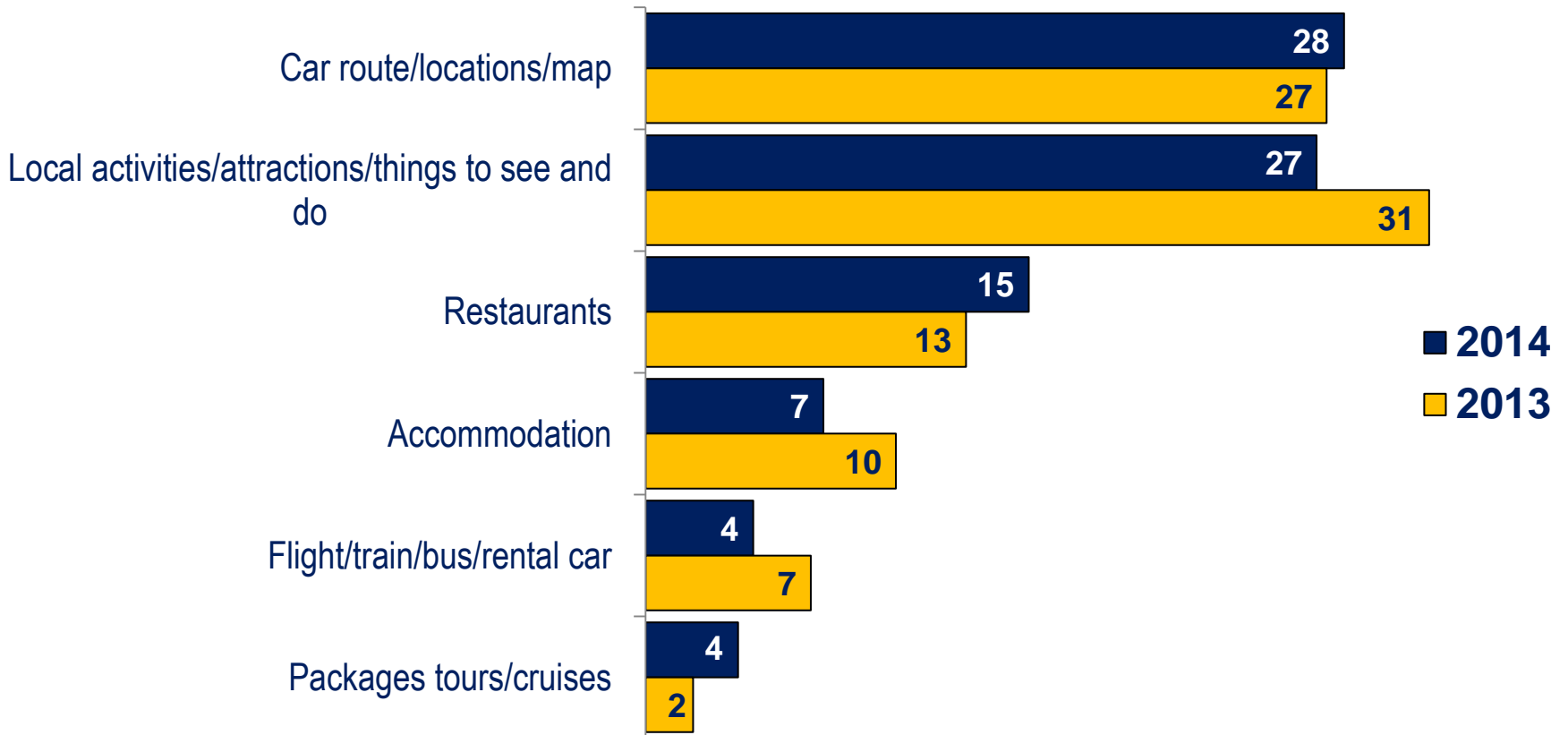
**Caution: low sample size*

Trip Elements Planned Using Internet



Base: Marketable Day-Trips

Percent of Total

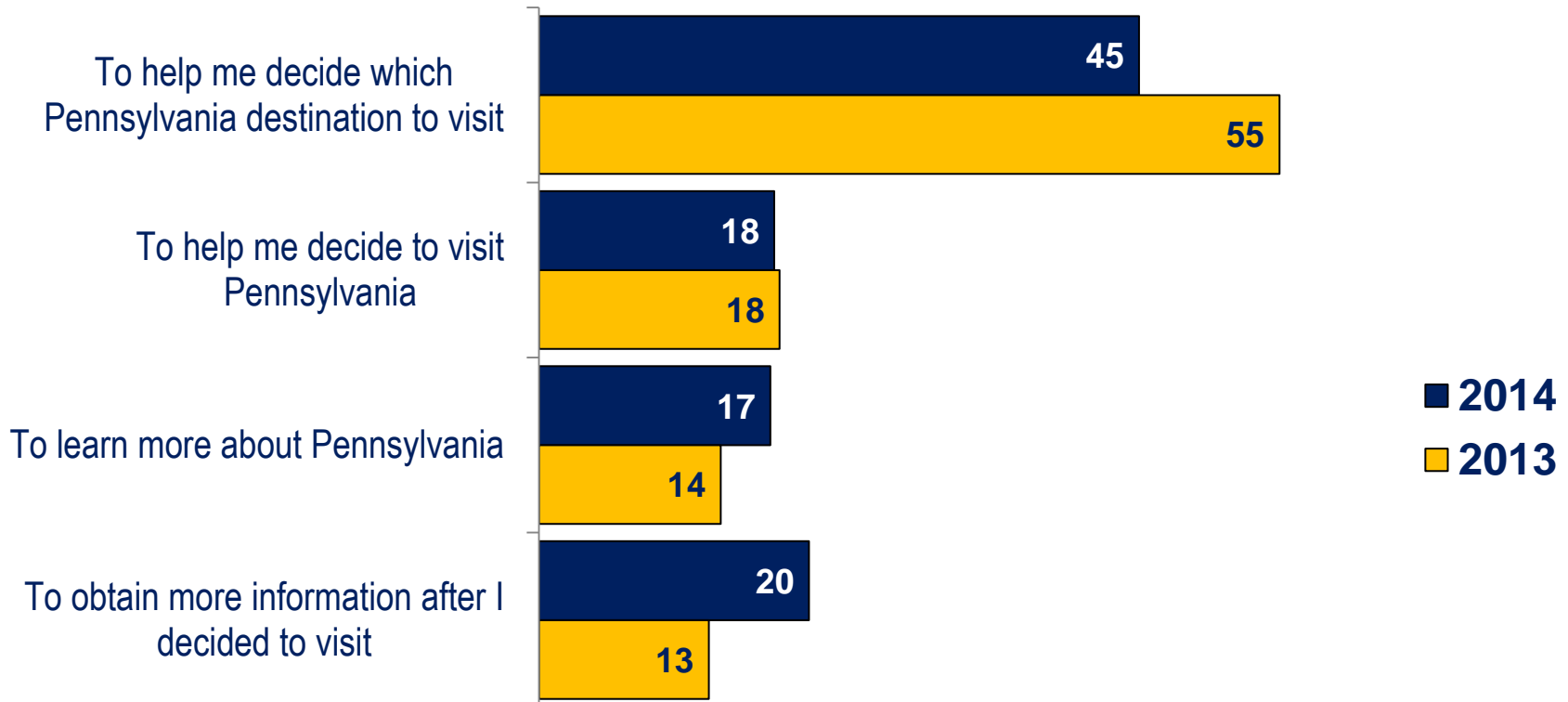


Reasons for Visiting www.visitpa.com



Base: Marketable Day-Trips

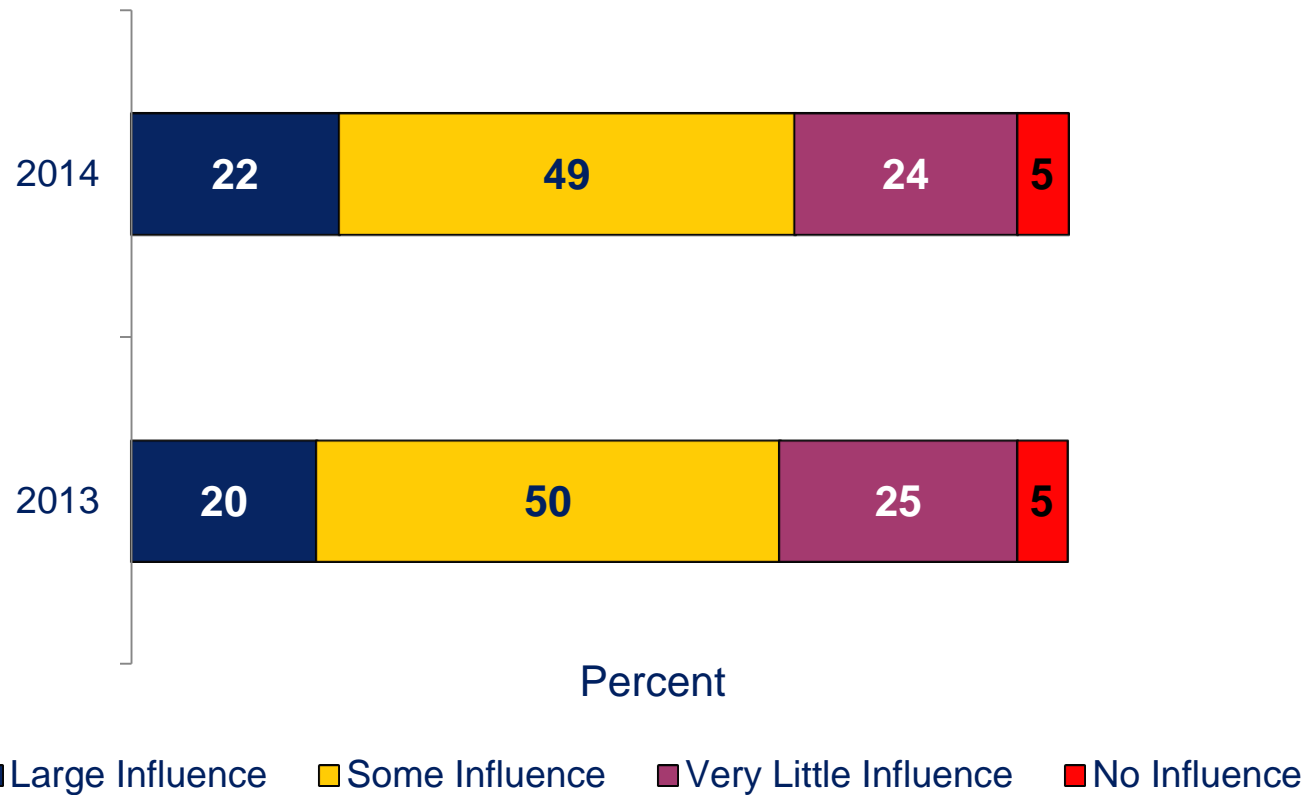
Percent of Total



www.visitpa.com Influence on Planning



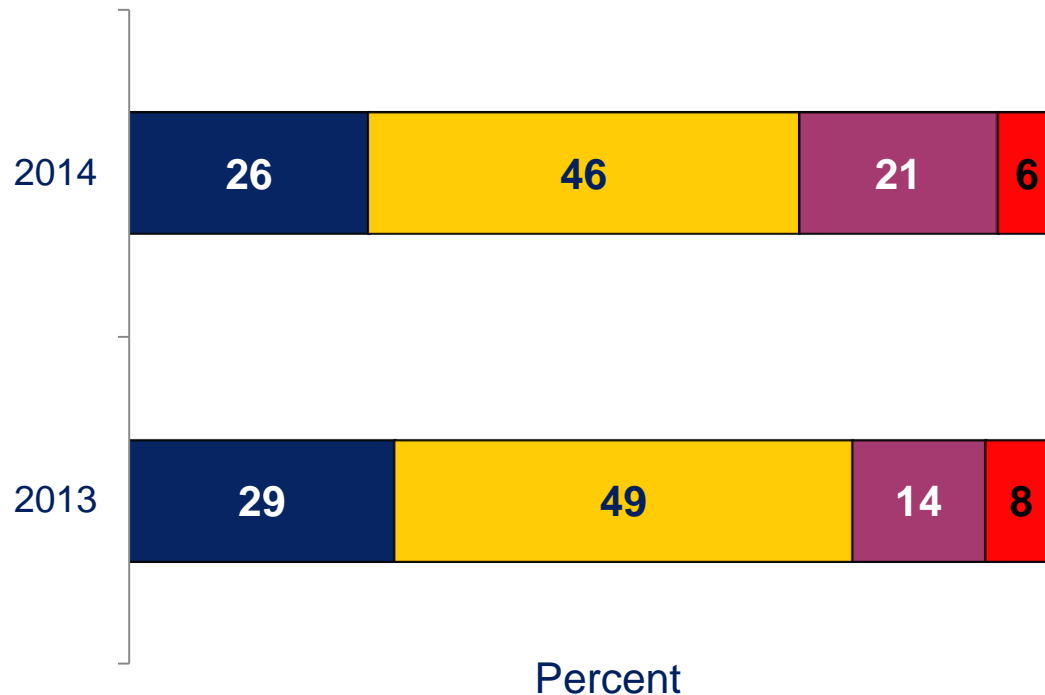
Base: Marketable Day-Trips



www.visitpa.com Influence on Visitation



Base: Marketable Day-Trips

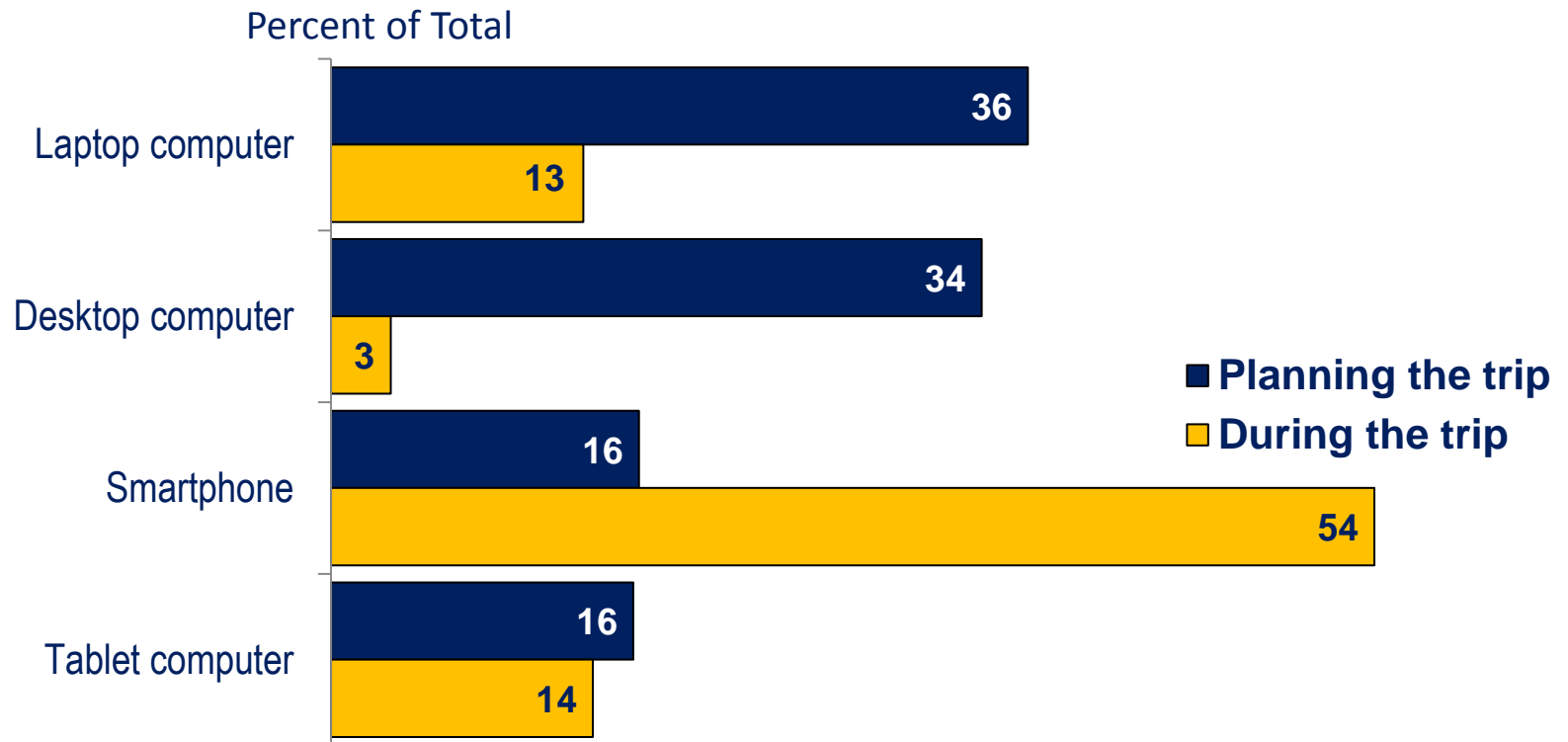


■ Large Influence ■ Some Influence ■ Very Little Influence ■ No Influence

Technology Used by Day-Trip Travelers



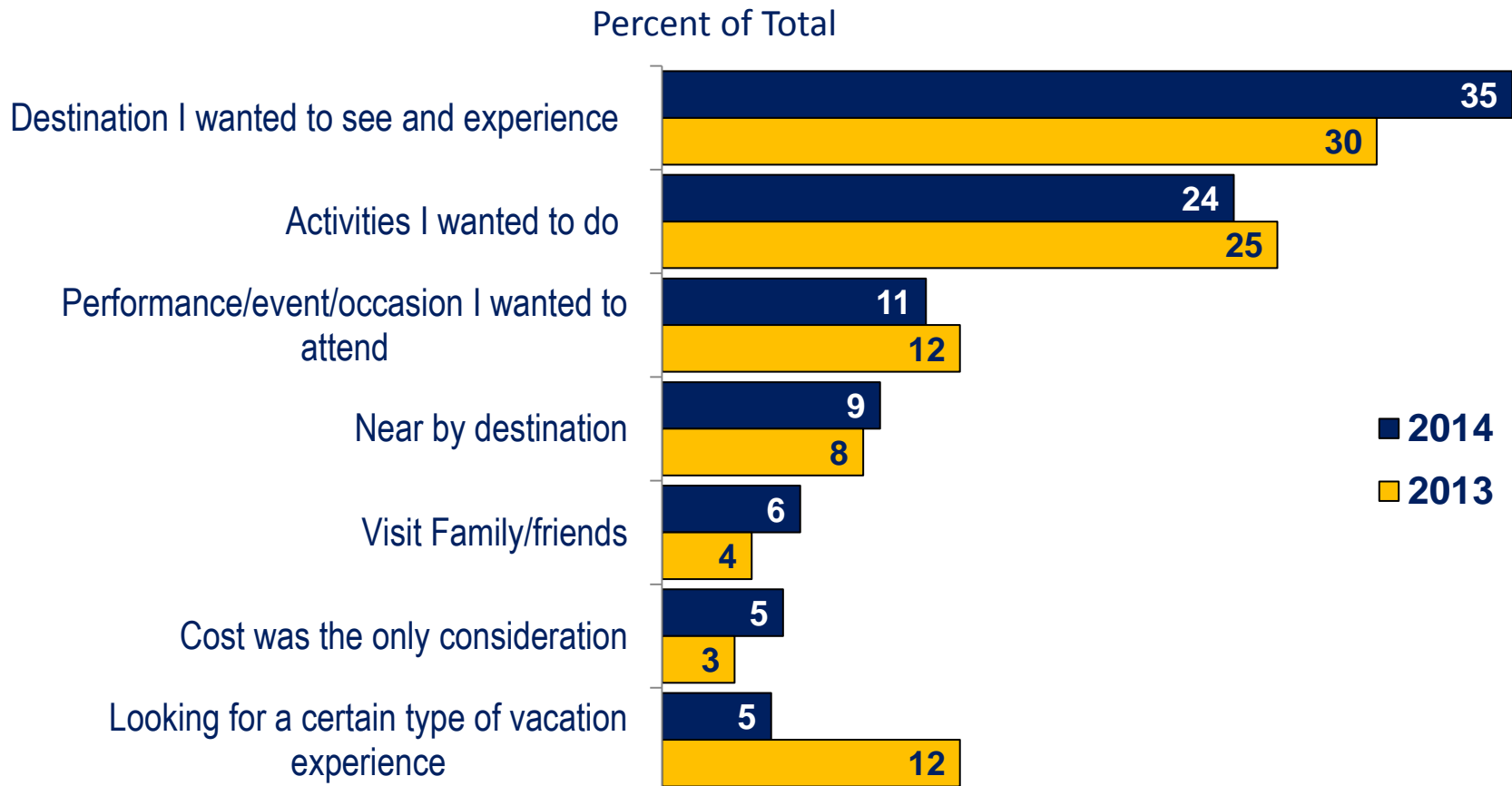
Base: Marketable Day-Trips



Planning Considerations Beyond Cost



Base: Marketable Day-Trips

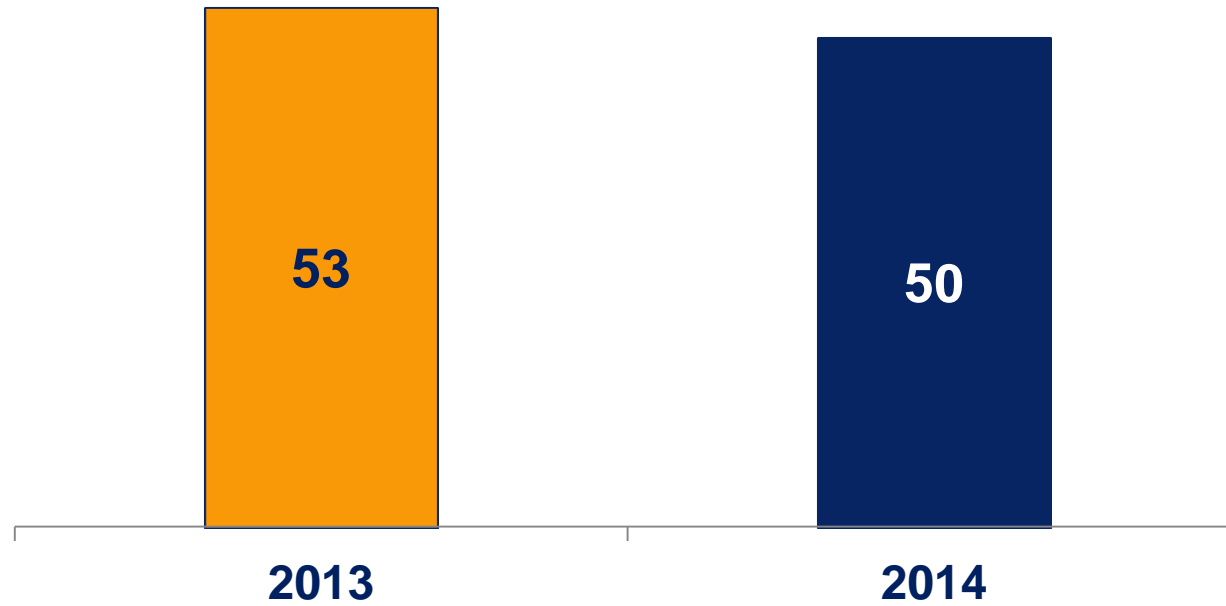


Percent Who Booked In Advance



Base: Marketable Day-Trips

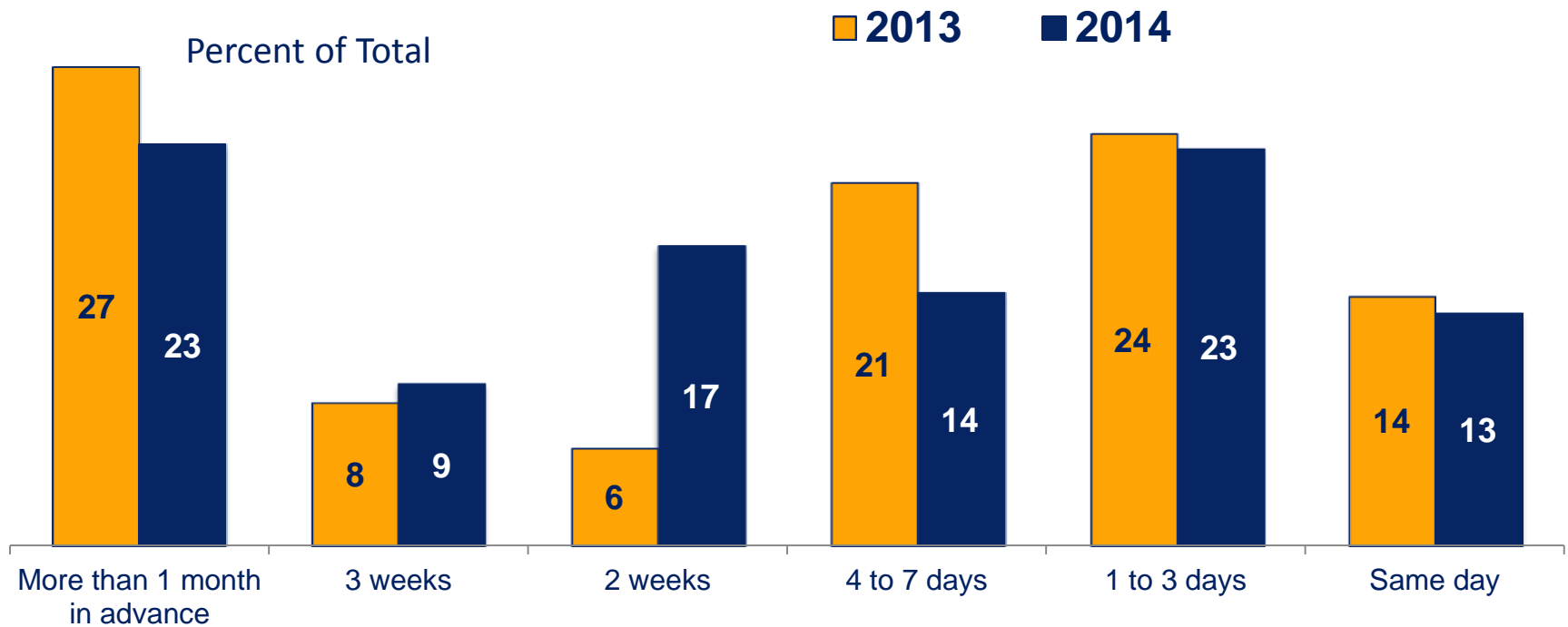
Percent of Total



Booking Cycle



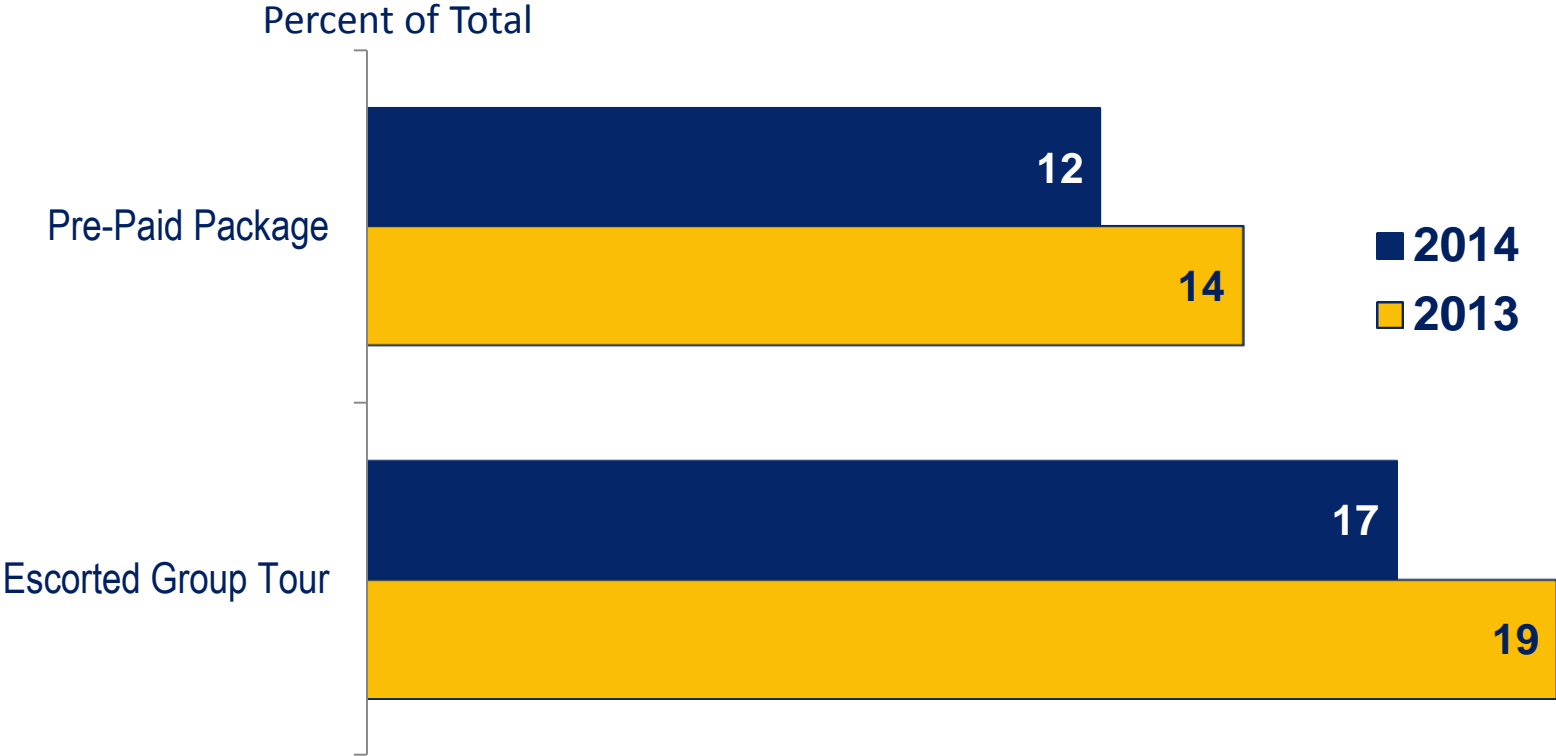
Base: Marketable Day-Trips Booked in Advance



Use of Vacation Packages and Group Travel



Base: Marketable Day-Trips

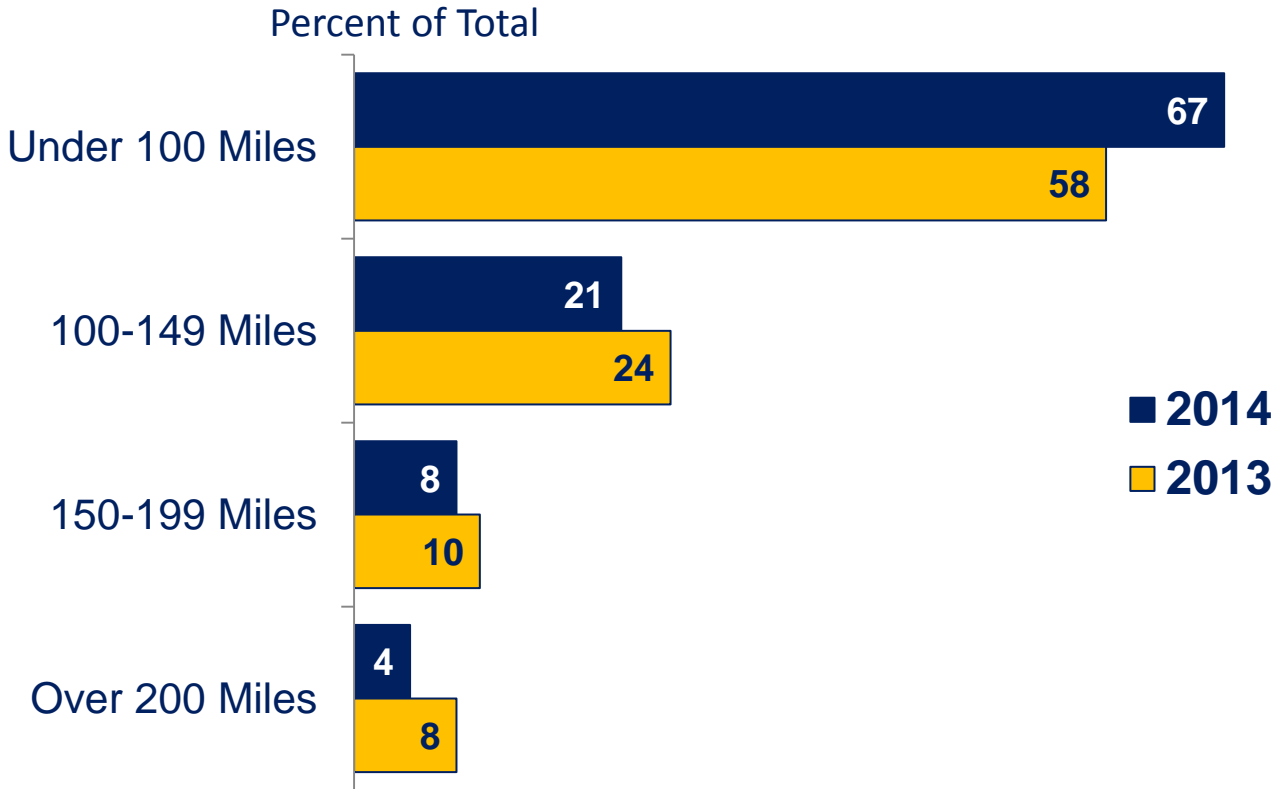


Marketable Day-Trip Characteristics

Distance Traveled for Pennsylvania Day-Trip



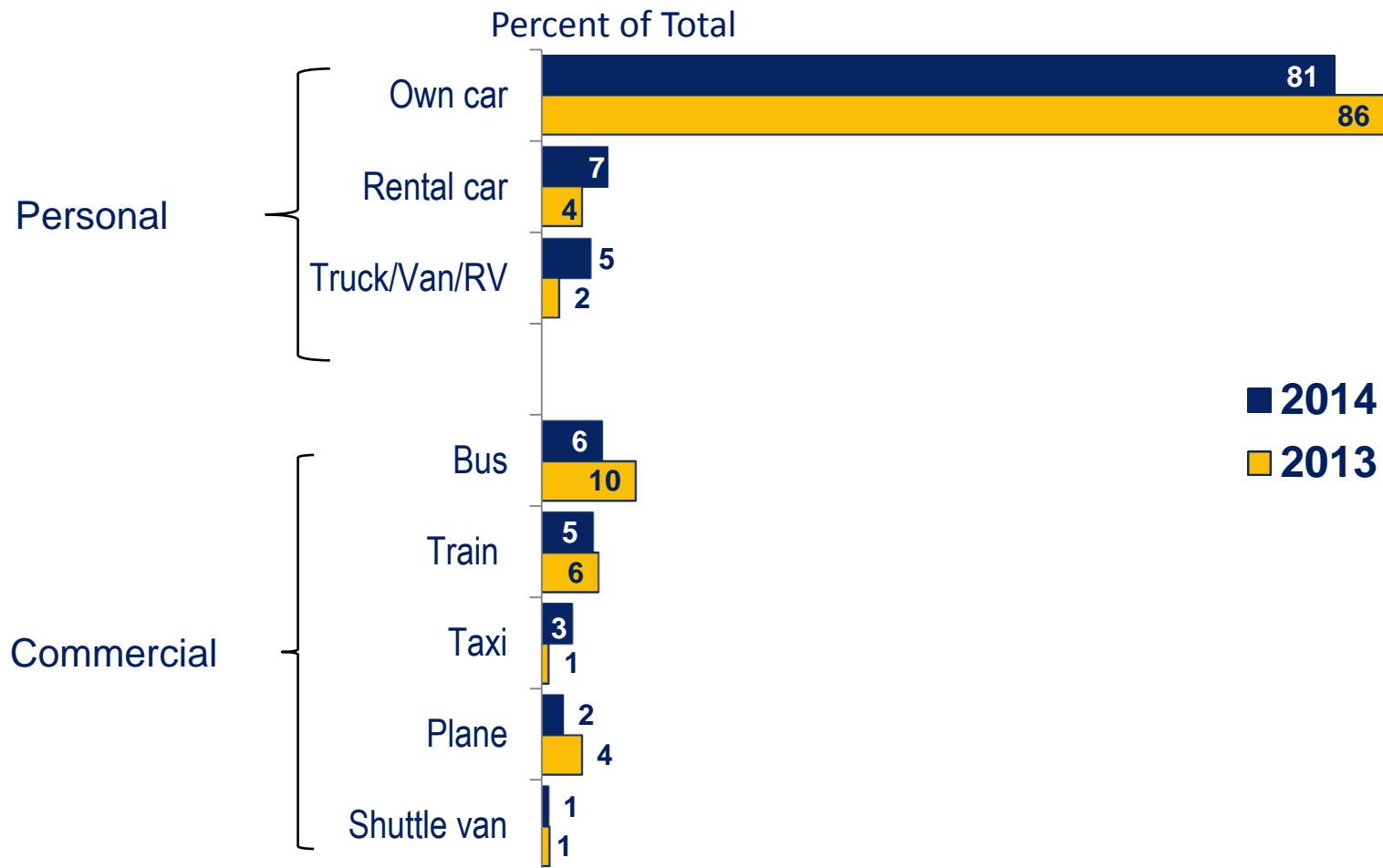
Base: Marketable Day-Trips



Transportation Used to Enter Pennsylvania



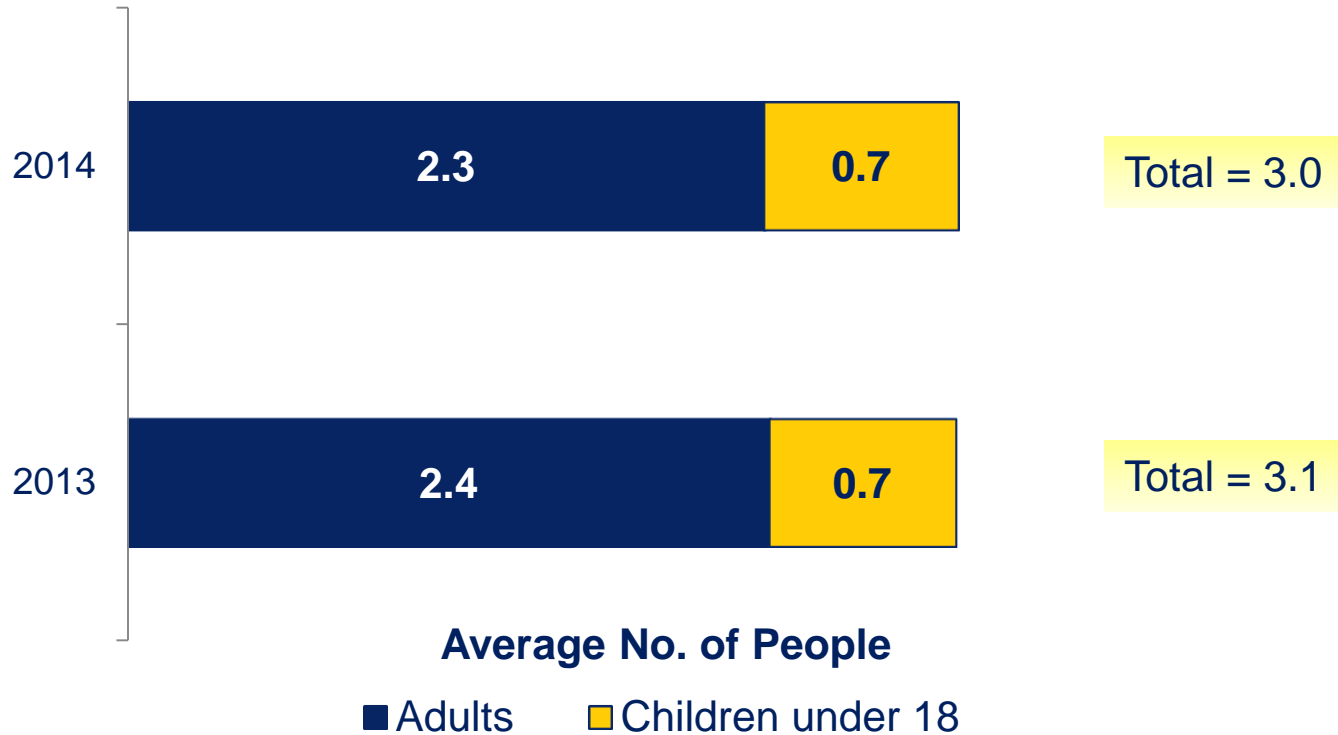
Base: Marketable Day-Trips



Size of Day-Trip Travel Party



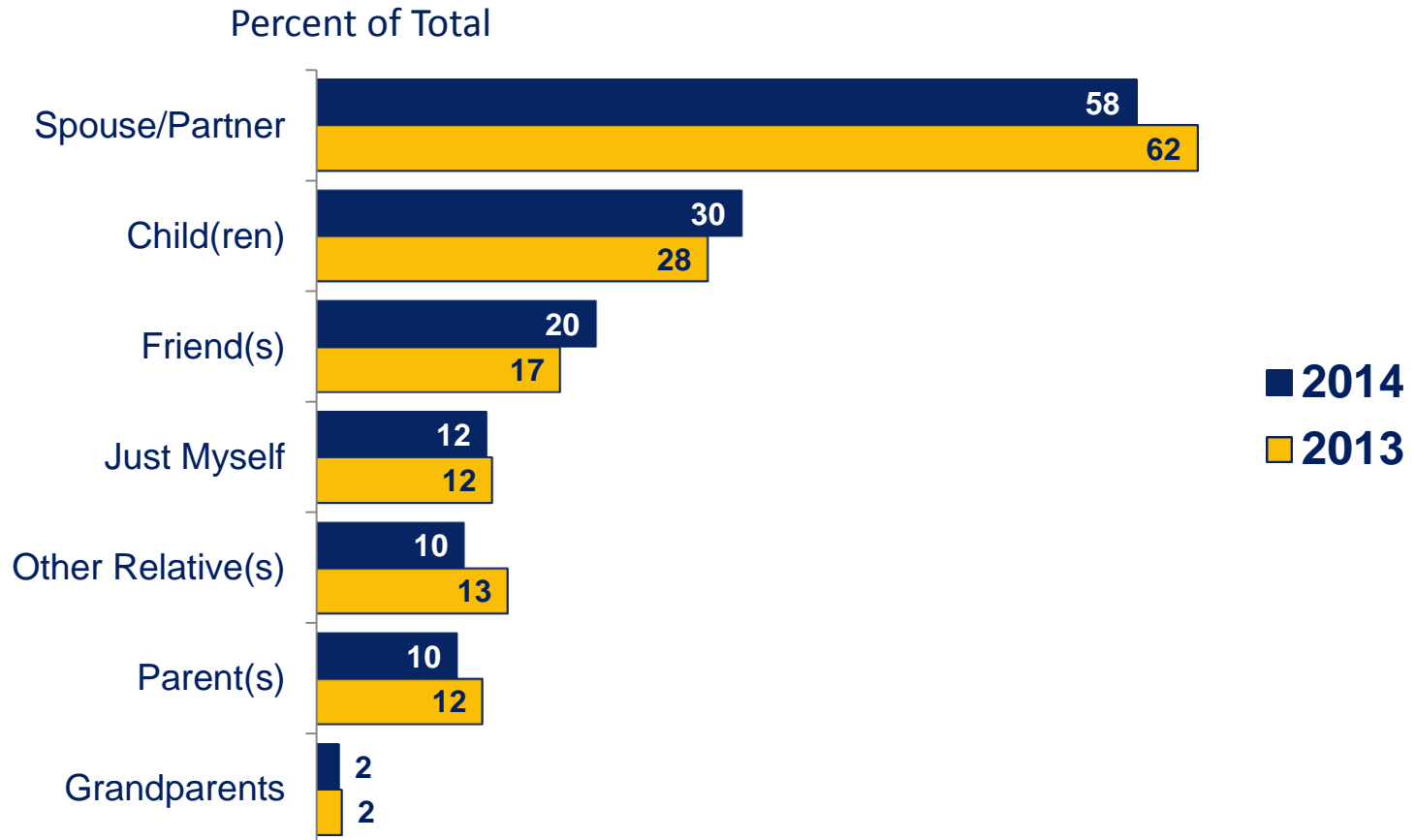
Base: Marketable Day-Trips



Composition of Day-Trip Travel Party



Base: Marketable Day-Trips



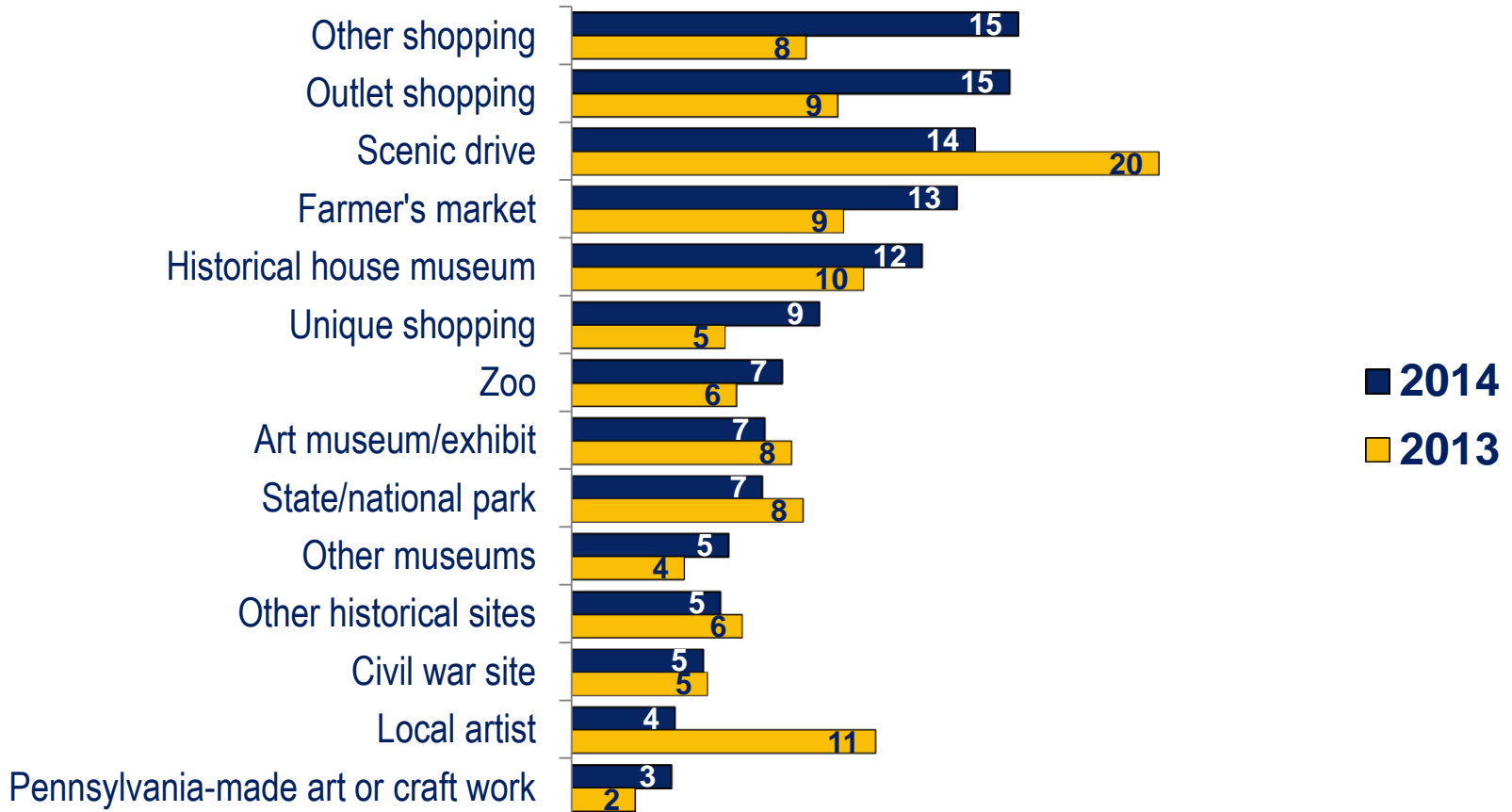
**Trip Experiences —
Marketable Day-Trips**

Things Seen and Experienced on Pennsylvania Day-Trip



Base: Marketable Day-Trips

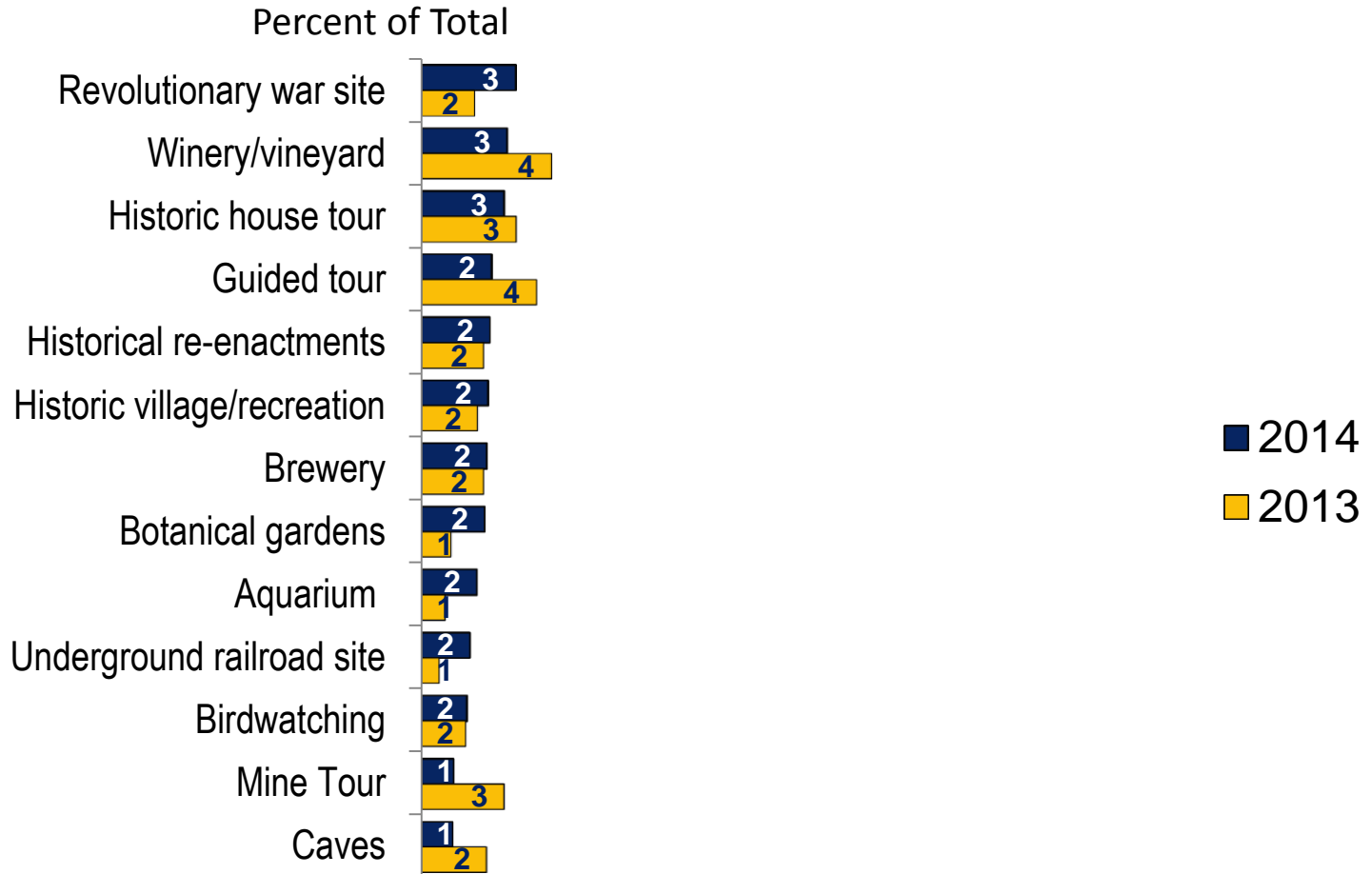
Percent of Total



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



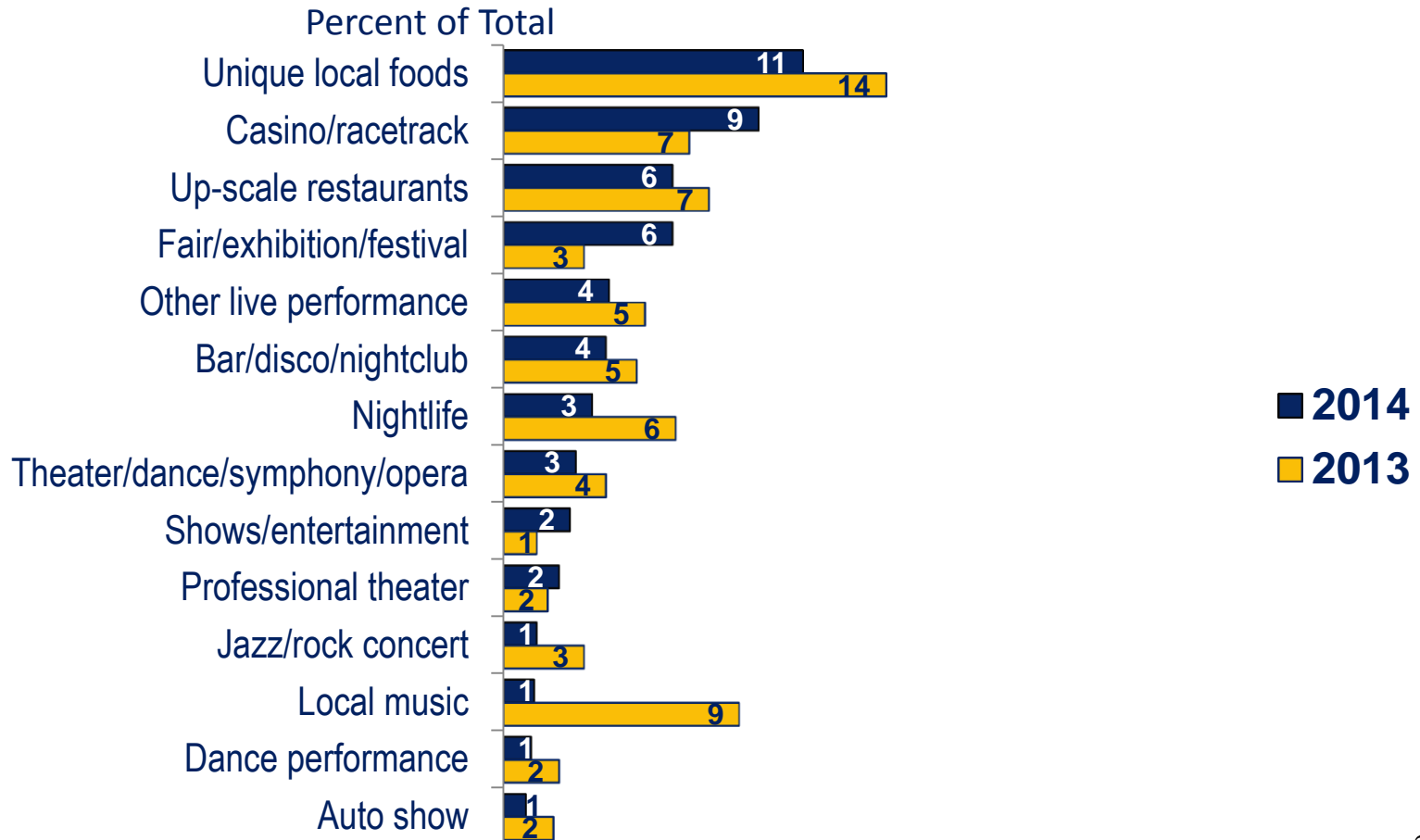
Base: Marketable Day-Trips



Dining/Entertainment



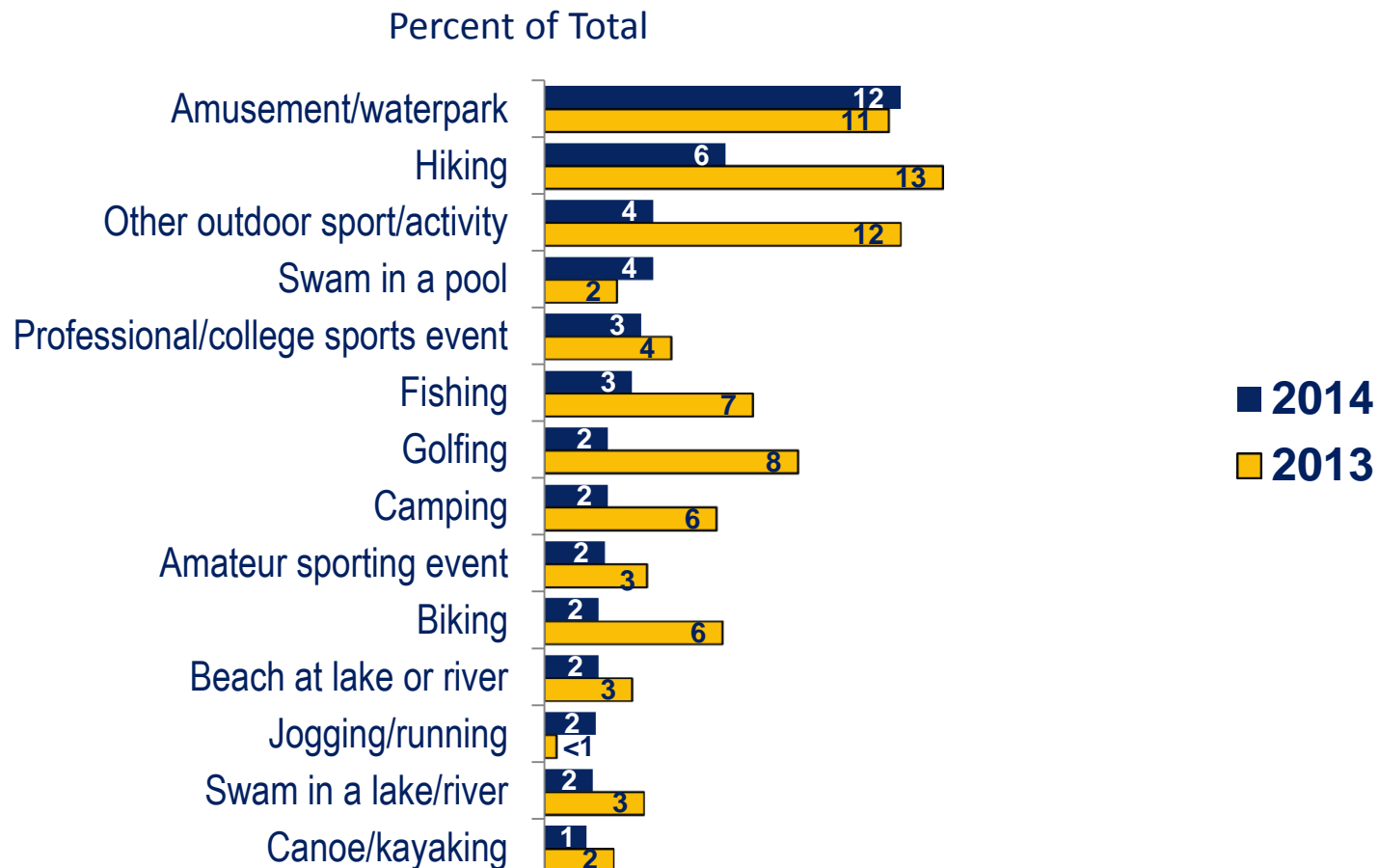
Base: Marketable Day-Trips



Sports and Recreation



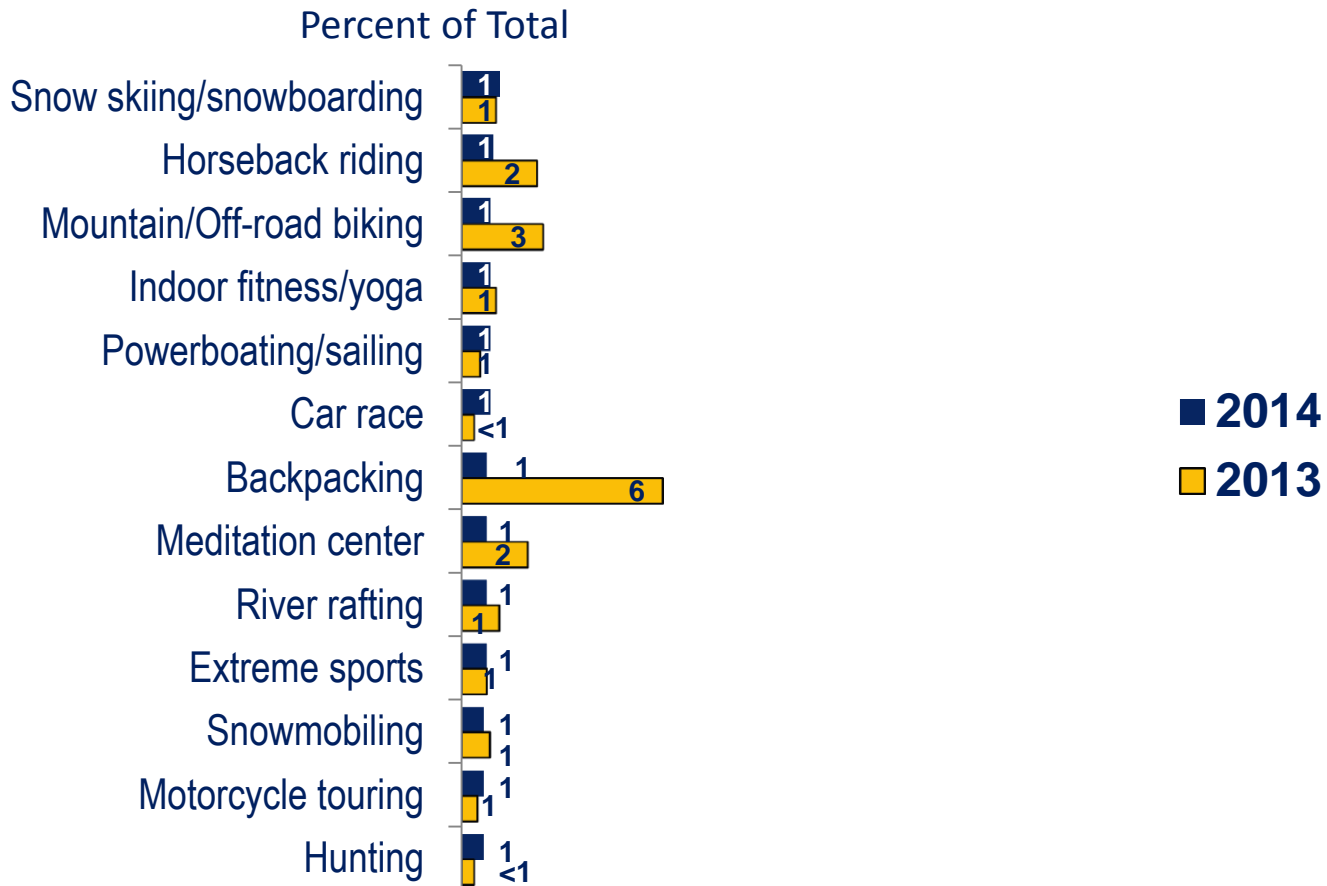
Base: Marketable Day-Trips



Sports and Recreation (Cont'd)



Base: Marketable Day-Trips

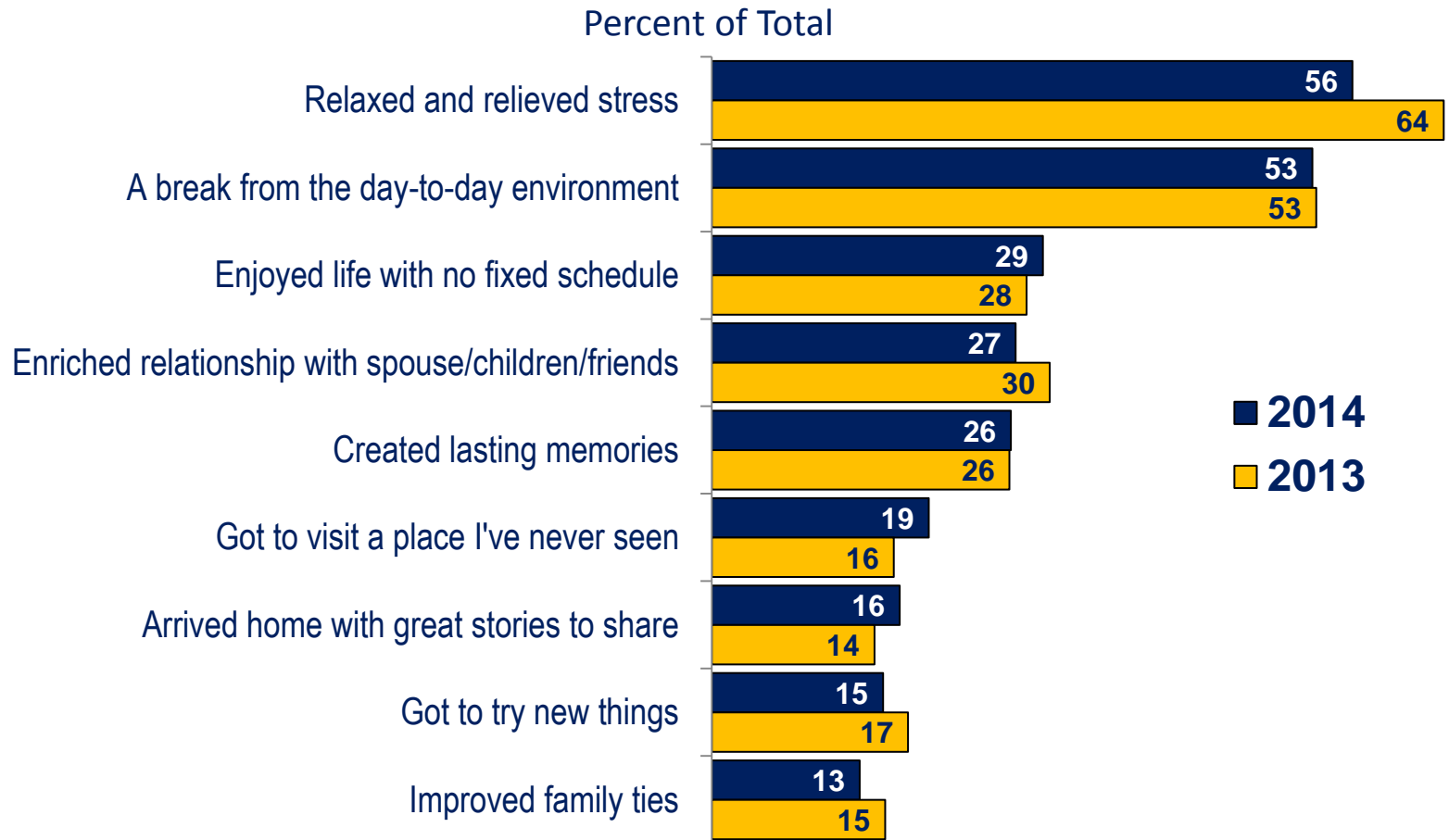


Trip Benefits — Marketable Day-Trips

Benefits From Pennsylvania Day-Trip



Base: Marketable Day-Trips



Benefits From Pennsylvania Day-Trip (Cont'd)



Base: Marketable Day-Trips

