

# **Pennsylvania's Annual Traveler Profile 2012 Travel Year**

**August 2013**

# Table of Contents



	<u>Page</u>
Introduction.....	4
Research Method.....	5
Executive Summary.....	8
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.....	48
Origin Markets .....	49
Traveler Profile .....	59
Trip Planning & Booking .....	71
Trip Characteristics .....	91
Trip Experiences .....	100
Activities by Origin Market of Traveler.....	106
Activities by Absence/Presence of Children in Household.....	113

# Table of Contents (cont'd)



	<u>Page</u>
Overnight Marketable Trips (cont'd)	
Regional Attractions Visited.....	115
Importance of Factors In Choice of Pennsylvania Tourism Region.....	139
Product Delivery.....	162
Trip Benefits .....	183
Pennsylvania Marketable Day-Trips.....	186
Origin Markets.....	187
Traveler Profile .....	190
Trip Planning & Booking.....	201
Trip Characteristics .....	218
Trip Experiences.....	223
Trip Benefits .....	228

# Introduction



## 2012 OVERVIEW

- Travel and tourism is an important industry for Pennsylvania, providing thousands of jobs for the state's residents and generating millions in tax revenues for the state and local communities.
- In 2012, Pennsylvania hosted an estimated 189.2 million visitors (as measured in person-trips) – a 4% increase from 2011. The increase in visitor volume was almost totally derived from the “marketable” segment, namely those travelers who visit a destination for purely leisure purposes (i.e., non-business) and whose stay can be influenced by marketing (e.g., travel to a destination for purposes other than visiting friends and family).
- The increase in marketable travelers was from both the overnight and day-trip segments, clearly showing that consumers are feeling more confident about their personal financial situation and willing to once again spend a portion of their discretionary dollars on travel.

# Research Methodology



The research for this report was conducted by Longwoods International.

The results consist of:

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

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

For the 2012 travel year, this produced 223,271 trips for analysis nationally – 148,056 for the overnight segment and 75,215 for day trips.

# Research Methodology (cont'd)



- The **Travel USA**® program identified 5,513 survey respondents who visited Pennsylvania on an overnight trip in 2012 and 4,606 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 1,253 total responses for the overnight segment and 779 total responses for the day-trip segment from this return sample.
- Estimates of Pennsylvania's overnight and day-trip volume were based on a number of sources, including Travel USA®, the customized return-to-sample research, and consultations with Tourism Economics.

# Research Methodology (cont'd)



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

# Executive Summary



## PENNSYLVANIA VISITOR VOLUME

Pennsylvania hosted an estimated 189.2 million travelers in 2012 (as measured in “person-trips”), a 4.1% increase from 2011.

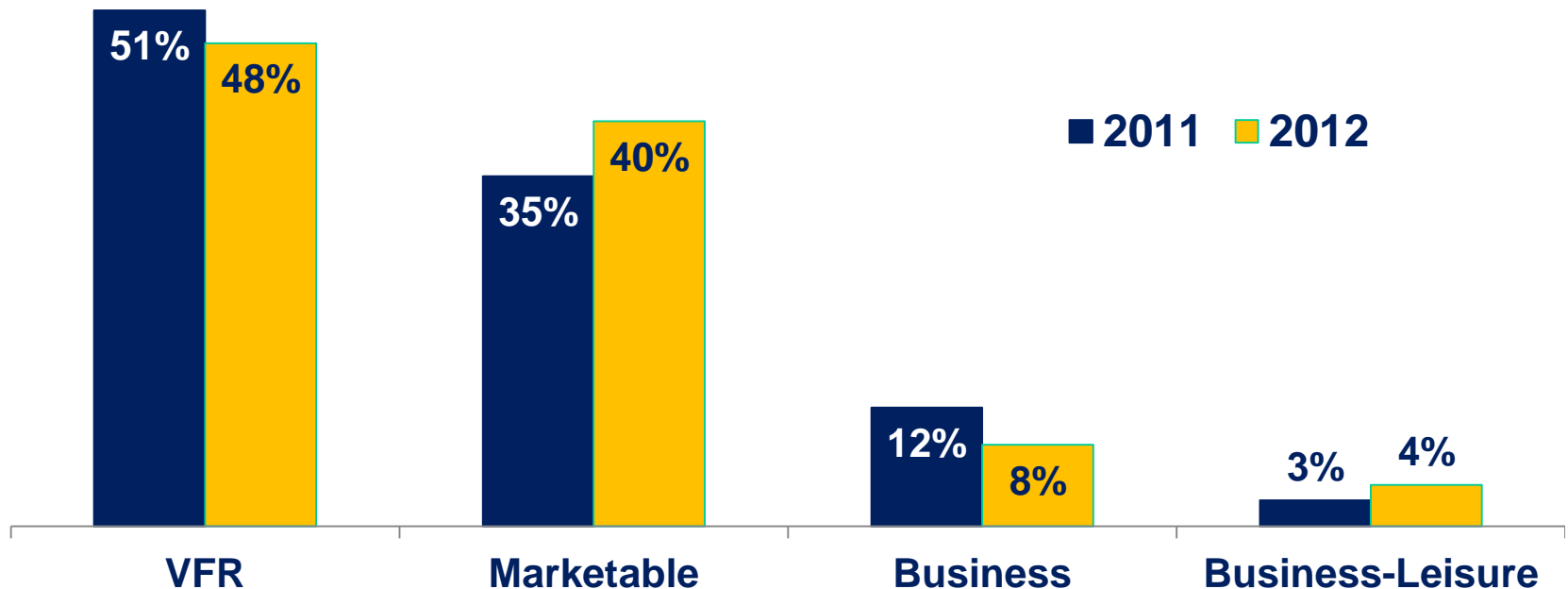
- More than a third of travelers (65 million) included an overnight stay, a 1.2% increase from 2011.
  - Visiting friends/relatives (VFR) remained the primary reason for an overnight stay in PA accounting for 48% of the overnight total (well above the 44% US average).
  - Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second leading category accounting for 40% of PA’s overnight travel, or an estimated 26 million travelers – a 17% increase from 2011.
  - PA experienced a clear shift away from VFR travel to marketable travel in 2012. The share of marketable overnight travel rose 5 percentage points from 2011, as illustrated in the graph on the following slide. In contrast, the US average share of VFR travel was unchanged from 2011 at 44%, while marketable overnight rose 2 percentage points to 42% due to a shift in the proportion of business travel.



# Executive Summary



## Main Purpose of Trip for Pennsylvania Overnight Travel 2011 and 2012



# Executive Summary (cont'd)



## PENNSYLVANIA DAY-TRIP VISITOR VOLUME

- Pennsylvania hosted an estimated 124.2 million day-trip travelers in 2012 – a 5.7% increase from 2011.
  - Marketable trips accounted for 55% of PA's day-trip travel, or an estimated 68 million travelers, a proportion exceeding the US average of 52% and the state average for overnight travel (40%) .
  - Visiting friends/relatives (VFR) was the second leading reason for a PA day-trip in 2012, accounting for 34% of the day-trip total (unchanged from 2011) and slightly below the 37% US average and well below the state average for overnight travel (48%).
  - Business trips and Business-Leisure accounted for 8% and 3%, respectively, of PA's 2012 day-trip total.
  - When compared with 2011, the relative distribution of PA's major day-trip travel types was essentially unchanged.

# Executive Summary (cont'd)



## ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Ohio, and Maryland remained the top five origin states for Pennsylvania marketable overnight and day-trip travelers in 2012, together accounting for 78% and 87%, respectively, of the total.
- Pennsylvania was the top origin market for PA's leisure travelers accounting for 36% of marketable overnight travelers; 49% of marketable day-trip travelers; 34% of overnight VFR travelers; and 47% of the state's day-trip VFR travelers.
- Pennsylvania was also the top origin state for PA business overnight travelers accounting for 30% of the state total, with New York, Ohio, New Jersey, and Maryland, together accounting for an additional 33% of PA's overnight business travelers.
- New York continued to be an important origin market for business travelers combining leisure travel with a business trip, accounting for 18% of PA's overnight business-leisure travel segment – second only to Pennsylvania (23%).

# Executive Summary (cont'd)



## PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region had the highest total overnight visitation numbers of the state's 11 tourism regions, with 14.4 million person-trips in 2012, followed by Pittsburgh and Its Countryside and Dutch Country Roads regions.
- These three regions accounted for 57% of Pennsylvania's total overnight person-trips in 2012.
- The Dutch Country Roads and Pocono Mountains regions were essentially tied as the state's leading region for marketable overnight leisure trips in 2012, followed by the Philadelphia and The Countryside and Pittsburgh and Its Countryside regions.
- With their large population bases, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions were the leading destinations for the state's overnight business and VFR (visiting friends and relatives) travel.

# Executive Summary (cont'd)



## Why Pennsylvania?

Nearly half (47%) of Pennsylvania's overnight marketable visitors traveled to/within the state because they had visited before and wanted to see more in 2012 – down from 62% the prior year.

A recommendation from friends/relatives was responsible for 17% of the state's overnight marketable visitors in 2012 – up 4 percentage points from 2011. When viewed together with the large percentage of travelers who had visited Pennsylvania before and wanted to see more, the importance of cultivating a positive image and experience for travelers cannot be overstated.

Living nearby was essentially tied with personal recommendation as the main reason to visit Pennsylvania in 2012 – cited by 17% of survey respondents.

Advertising influenced 8% of marketable overnight travelers' decision to visit Pennsylvania in 2012, the same proportion who were influenced by a tourism article or news story they heard or read.

# Executive Summary (cont'd)



## Planning and Booking by Marketable Overnight Travelers

The planning cycle for today's time-pressed travel consumers is relatively short with slightly more than half of Pennsylvania's marketable overnight travelers planning their trip in a month or less (31%) or within two months (21%) in 2012.

The internet is the single most important planning source – used by 50% of Pennsylvania's marketable overnight travelers in 2012, with books and personal experience tying for second with each used by 17% of travelers.

Nearly half of Pennsylvania's marketable overnight travelers used the internet to research and plan their accommodations (48%), while more than a third relied on the internet for maps or directions (37%), close to 30% to find out about local attractions and activities (29%), and a quarter for information on restaurants (24%) in 2012.

In terms of the technology used, more than half used a desktop computer (56%) or laptop (48%) in planning their PA trip. While 20% used a smartphone to plan their trip, usage soared to 46% during the trip.

# Executive Summary (cont'd)



## **Use of Social Media by Pennsylvania's Marketable Overnight Travelers**

Approximately 70% of Pennsylvania's marketable overnight leisure travelers used social media in some capacity in 2012 – just below the 72% 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 just 33% of those 65 year of age or older.

Posting travel photos and/or videos online was the most common social media activity of PA's marketable overnight leisure travelers below the age of 45 in 2012, while reading online travel reviews was the most common social media activity of travelers 45 years of age or older, including those in the 65+ age group.

# Executive Summary (cont'd)



## Trip Experiences

Scenic drives, shopping, and visiting historical houses/museums remained the top three trip experiences of Pennsylvania's marketable overnight travelers in 2012.

With the exception of visits to zoos, participation rates for most types of trip experiences by Pennsylvania's marketable overnight travelers in 2012 were little changed from 2011, with the proportion of travelers visiting zoos up 6 percentage points to 13%.

The participation rates for Pennsylvania's marketable day-trip travelers were generally below those of the overnight segment in 2012, although there were strong increases for a number of activities, most notably non-outlet shopping, farmers markets, historic houses/museums, and art-related experiences.



# Executive Summary (cont'd)



## Trip Characteristics

Pennsylvania is largely 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 2012.

Short stays were the norm for the majority of marketable overnight travelers with 60% staying just one or two nights on their Pennsylvania trip in 2012 – a far higher percentage than the 54% US average. However, there was a 4 percentage point increase in the proportion of PA travelers staying for 3-6 days to 31%.

Pennsylvania’s marketable overnight travelers largely preferred to stay in hotels or motels (56%), with 7% opting for a rented campground in 2012.

As in prior years, two-thirds of the state’s marketable overnight leisure visitors traveled with a spouse or partner, while well over a third (39%) had children along on their trip.

# Executive Summary (cont'd)



## Traveler Priorities and Expectations

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

For Pennsylvania's marketable overnight leisure travelers, their top priorities for a travel destination in 2012 were (in descending order): exciting, adult atmosphere, family friendly, worry free, climate, sightseeing opportunities, luxurious, affordable, unique, the entertainment, 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 viewed the state more favorably on each of the priorities than non-resident travelers who visited the state.

# Executive Summary (cont'd)



## Benefits from a Pennsylvania Overnight or Day Trip

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

As in the previous two years, the benefits of travel for PA's marketable overnight and day-trip leisure visitors largely reflect a break from people's day-to-day responsibilities and stress and provide a time to create lasting memories with those who are most important to them, namely family and friends.

The top five trip benefits cited by Pennsylvania's 2012 marketable overnight and day-trip travelers were: relaxed/relieved stress, a break from the day-to-day routine, no fixed schedule, an opportunity to create lasting memories, and enrich relationships.

Visiting a place never seen before ranked just out of the top five benefits of travel, cited by nearly a quarter of survey respondents – a 7 percentage point increase from 2011.

# Executive Summary (cont'd)



## DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

As in prior years, Pennsylvania's 2012 marketable overnight travelers were generally higher income, well-educated, married adults.

- Pennsylvania's marketable overnight travelers had a median age of 41.7 years, slightly above the US median of 40.4 years of age, and below the median age of the state's marketable day-trip travelers (44.9 years).
- The majority were married or with a partner (64%) – slightly above the US average of 61% and that of marketable day-trip travelers (62%) in 2012.
- A majority of travelers (54%) had children under 18 years of age living at home – a proportion well above that of the state's marketable day-trip travelers (46%).
- The median household income of the state's marketable overnight travelers was \$65,420, with close to a quarter (24%) with an annual household income of at least \$100,000. The median household income of the state's marketable day-trip travelers was lower than the state's overnight travel segment at \$59,650.

# Executive Summary (cont'd)



## DEMOGRAPHIC CHARACTERISTICS BY AGE OF TRAVELER

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

- Pennsylvania's marketable overnight travelers under the age of 45 were more likely to hold at least a bachelor's degree or higher than those 45-64 years of age, i.e., 48% vs 40%, respectively.
- The proportion of travelers with children under 18 years of age differed markedly based on the age of the traveler:

<u>Traveler's Age</u>	<u>Percent With Children Under Age 18</u>
18-24	54%
25-34	65%
35-44	77%
45-54	60%
55-64	22%
65+	9%

# Executive Summary (cont'd)



## Marital Status by Age

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

- Pennsylvania's marketable overnight travelers in the youngest age group (18-24) were overwhelmingly single (76%).
- There was a distinct shift to married or with partner (60%) for the 25-34 age group, but with roughly a third still reporting as single.
- The vast majority of the state's marketable overnight travelers in the 45-54 and 55-64 age ranges were married/living with a partner (above 70% for each group).
- While the overwhelming majority of travelers in the 65+ age group were married or living with a partner (70%), not surprisingly they had the highest proportion that were widowed.

# Detailed Findings

# **Size & Structure of US Overnight Travel Market**



# Size and Structure of the US Domestic Travel Market



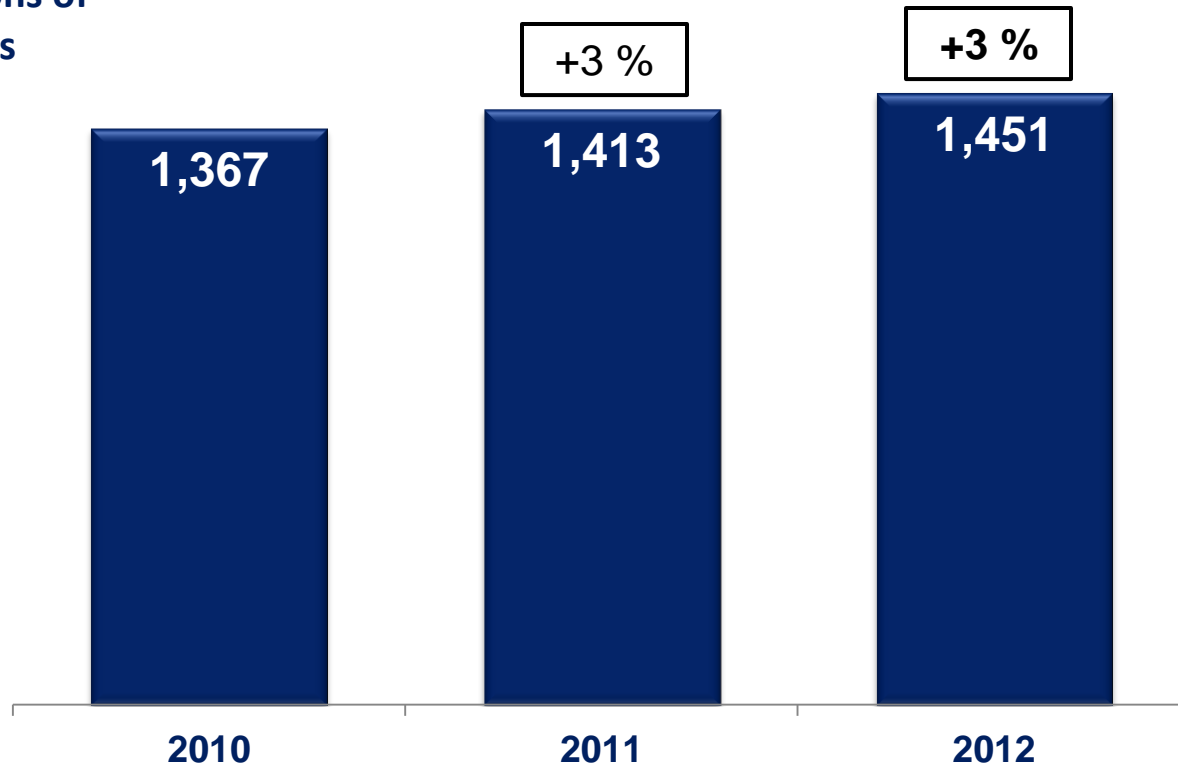
- Overnight travel by Americans increased by 3% in 2012 vs. 2011.
- Of the almost 1.5 billion trips taken, 80% were adults and 86% were taken for leisure purposes.
- Approximately half of the leisure trips were for the purpose of visiting friends and relatives, approximately 4% were business leisure trips and about 43% were of a trip type that can be influenced by marketing.
- 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 2012



Base: Total Overnight Trips

In millions of  
Trips

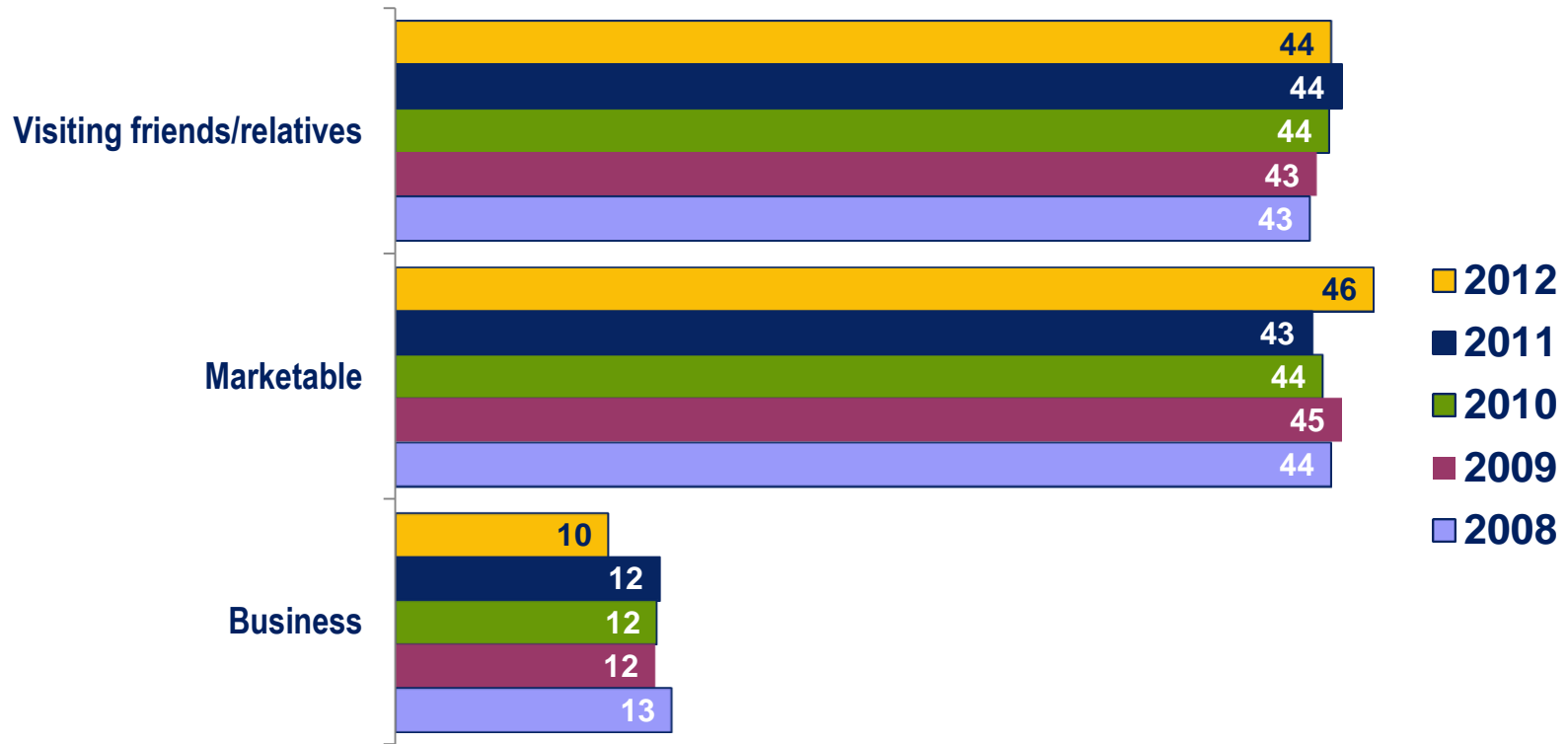


# Structure of the US Overnight Travel Market — Trends



Base: Overnight Trips

Percent of Total

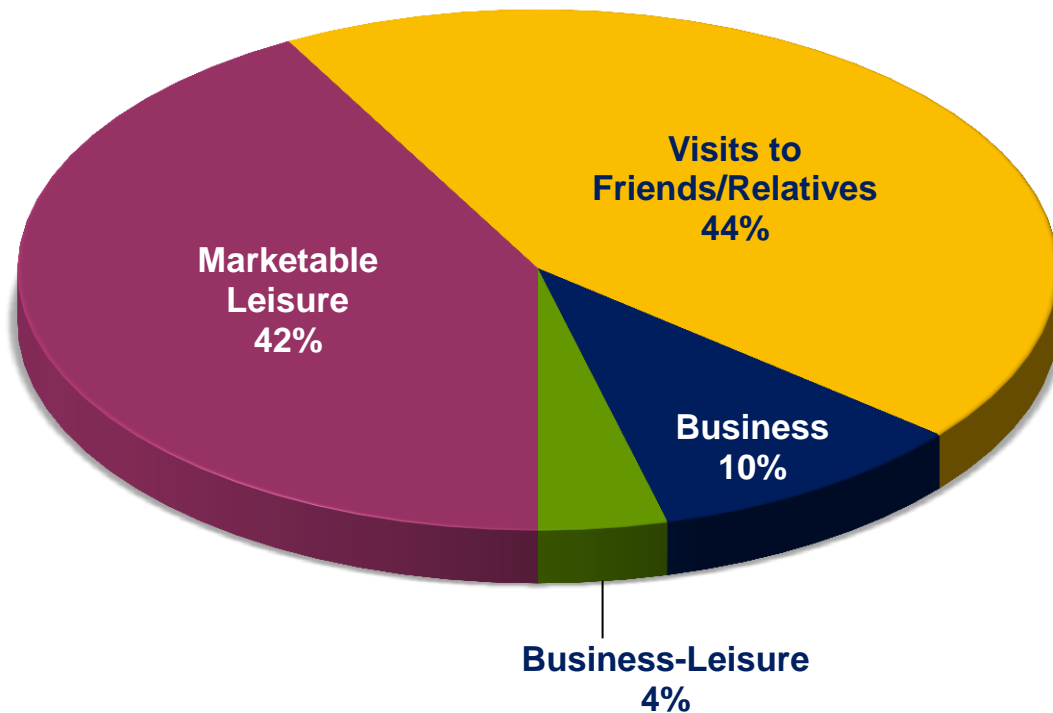


Business-Leisure trips are included in Marketable trips in this slide

# US Overnight Market Segments



Base: Adult Overnight Trips

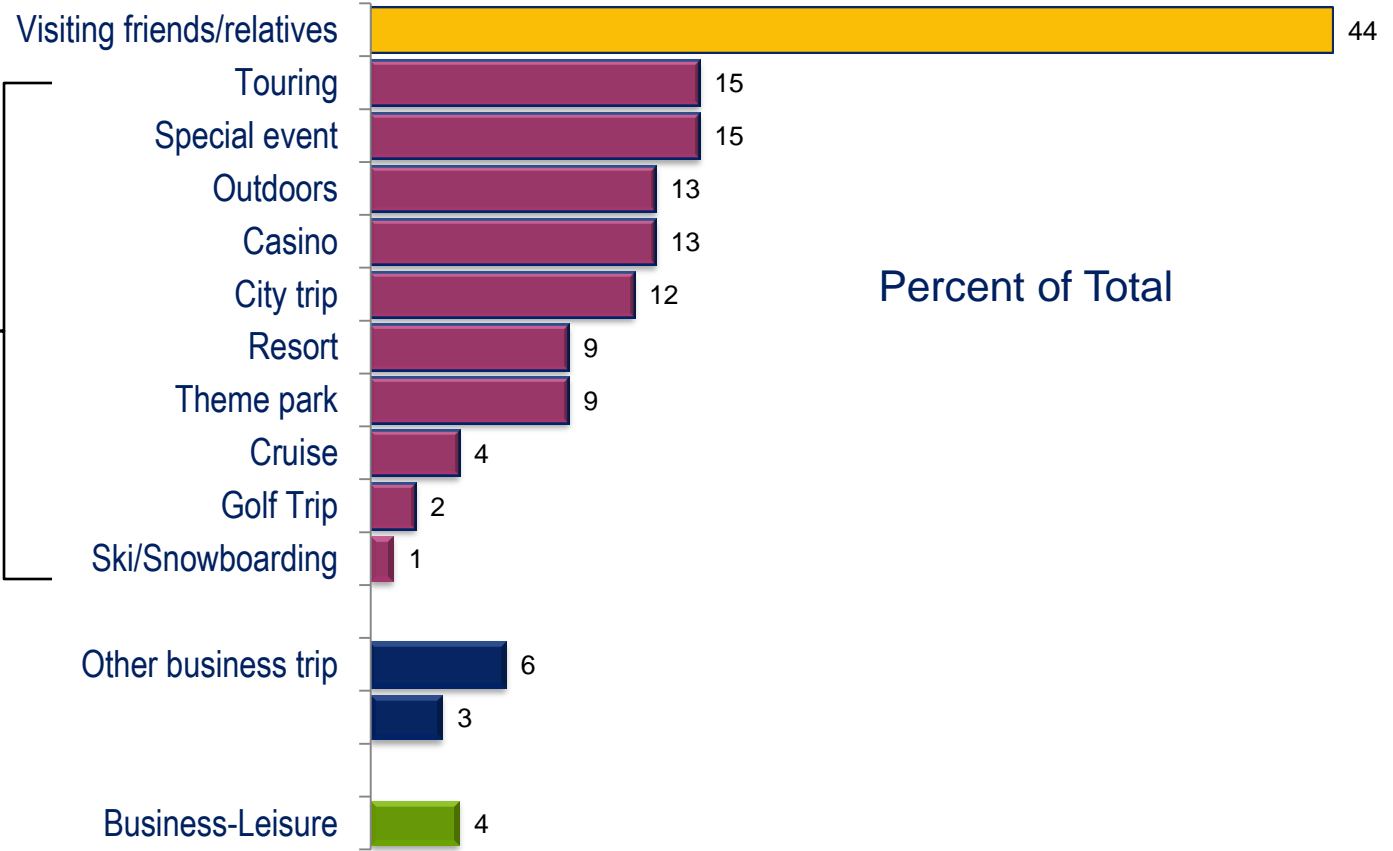


# Main Purpose of US Overnight Trips in 2012



Base: Adult Overnight Trips

**Marketable  
Trips**



# **Size & Structure of Pennsylvania's Travel Market**

# Pennsylvania's Travel Market



- An estimated 189.2 million trips were taken to and/or within Pennsylvania by US residents in 2012:

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

- Of the 65 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 include touring, special events, and outdoors.*

# Pennsylvania Day-Trip Travelers



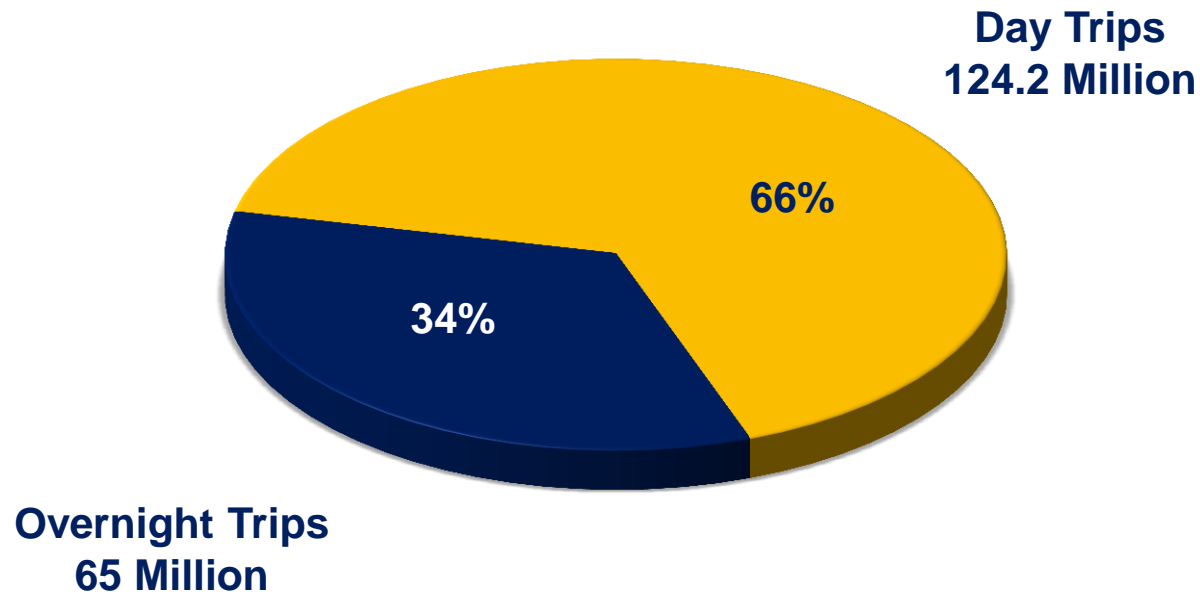
- Of Pennsylvania's estimated 124.2 million day-trip travelers:  
55% were marketable trip types (a much higher percentage than for overnight travel).
- Key marketable day-trip types include touring, special events, and shopping.



# Total Trips to Pennsylvania in 2012



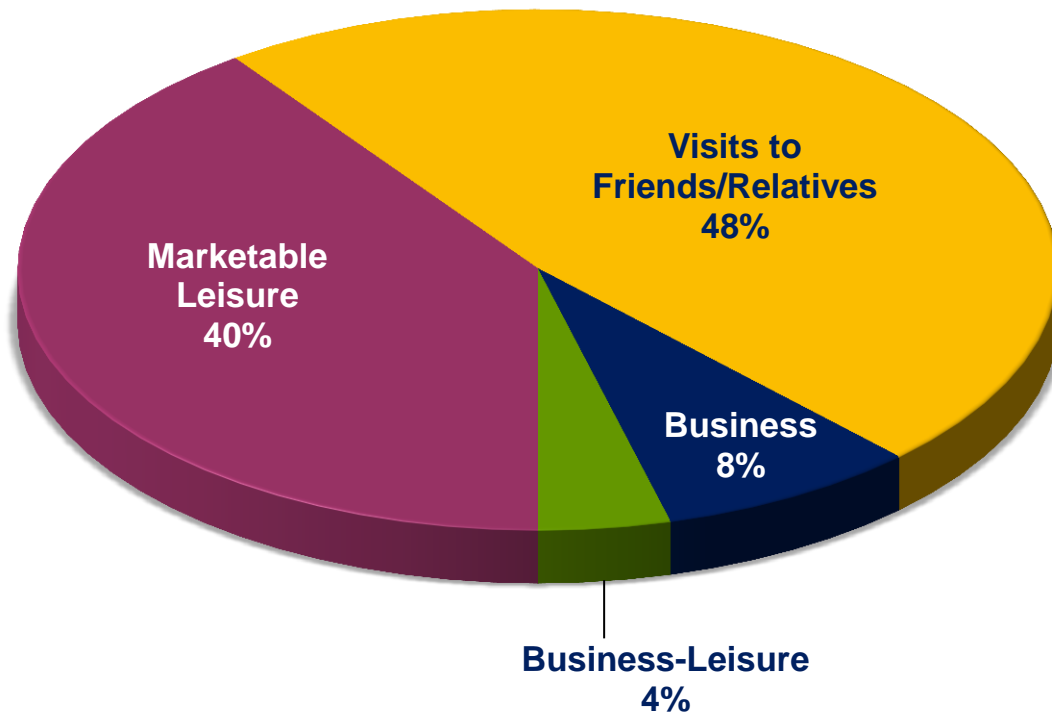
Total Person-Trips = 189.2 Million



# Pennsylvania's Overnight Trip Market Segments



Base: Adult Overnight Trips to Pennsylvania

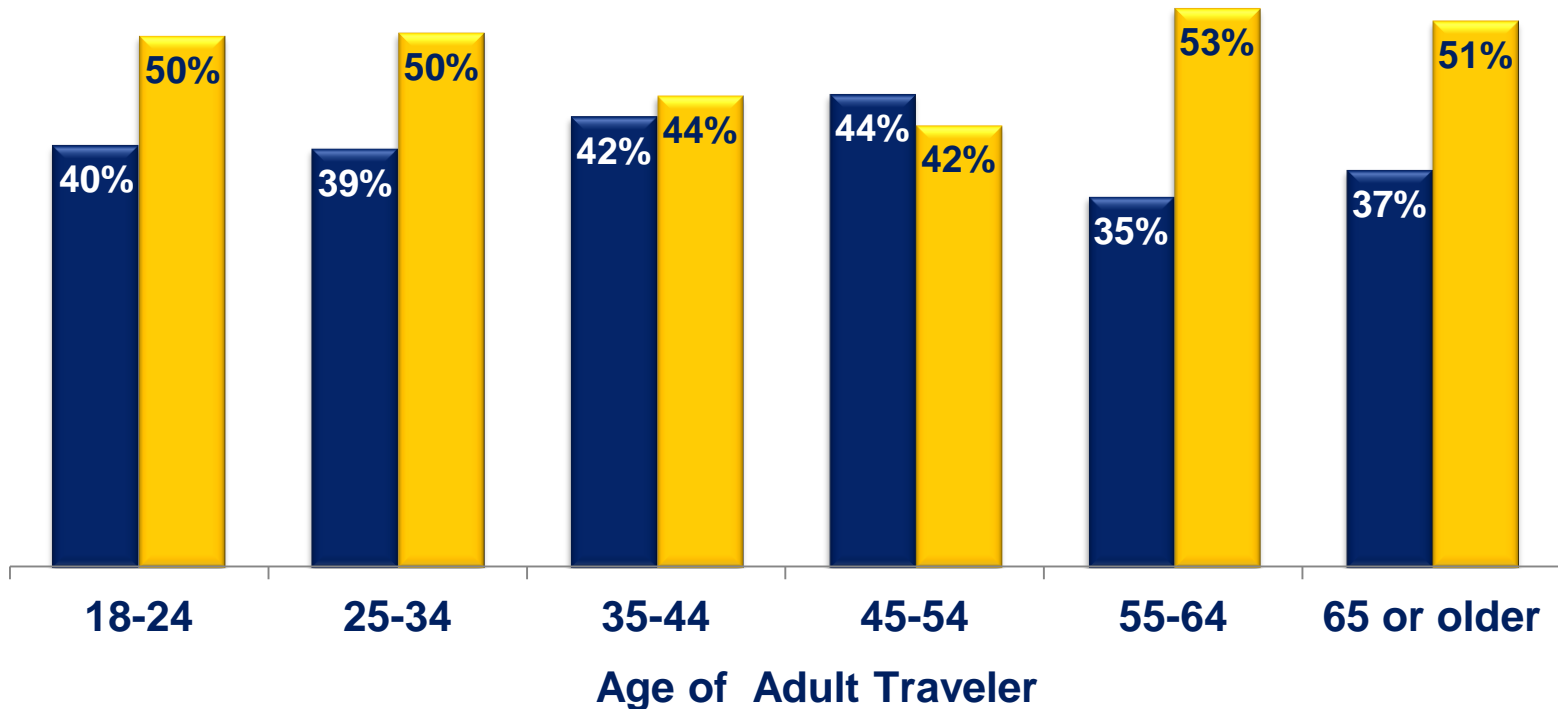


# Pennsylvania's Leisure Overnight Market Segments by Age of Adult Traveler



Base: Adult Overnight Trips to Pennsylvania

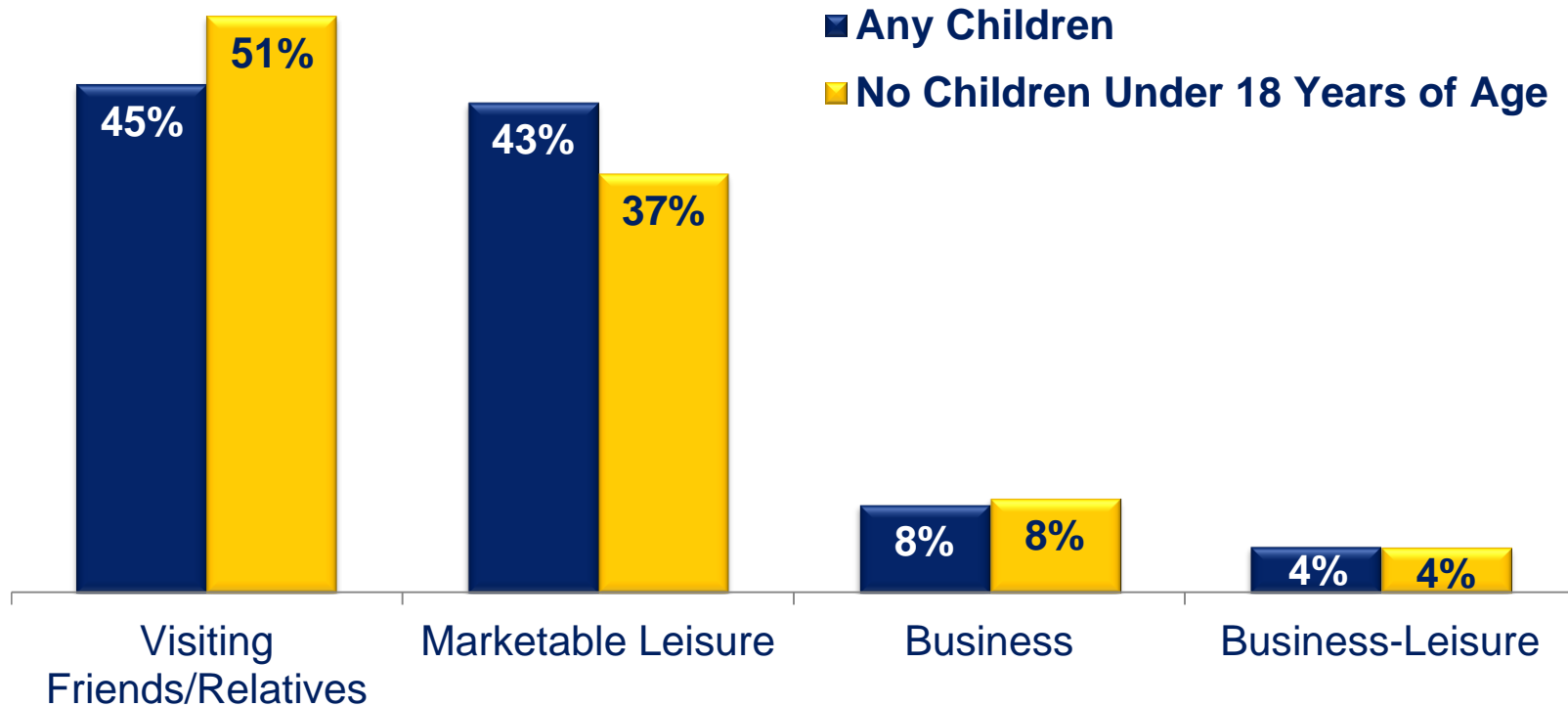
■ Marketable Leisure    ■ Visiting Friends/Relatives



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



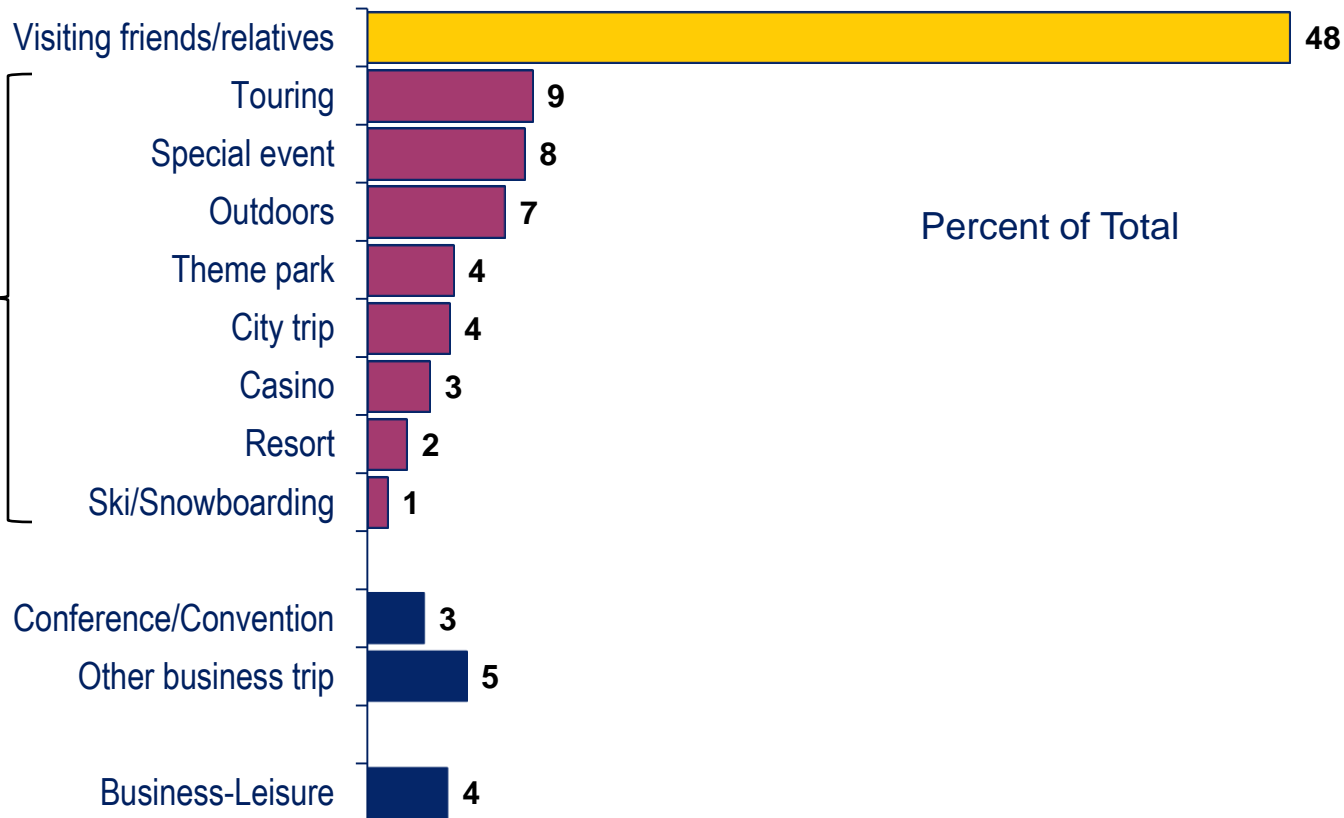
Base: Adult Overnight Trips to Pennsylvania



# Main Purpose of Overnight Trips to Pennsylvania in 2012



Base: Adult Overnight Trips

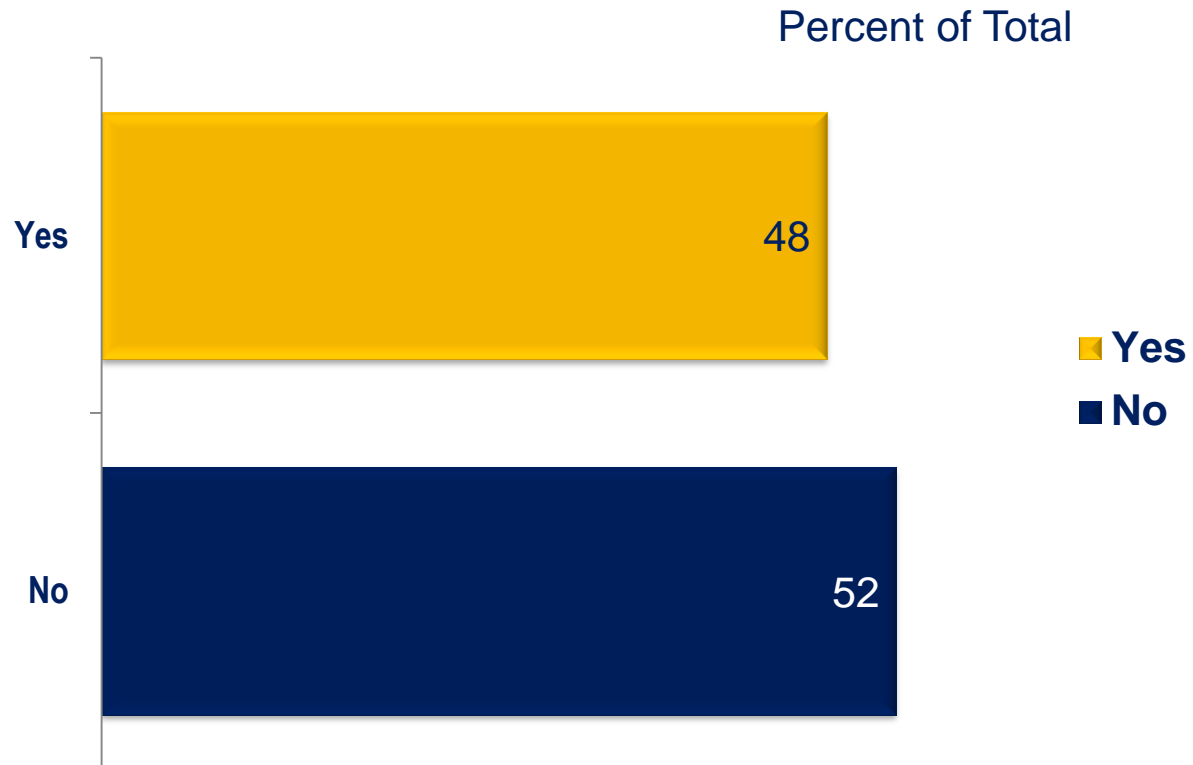


**Marketable Trips**

# Special Event Trip



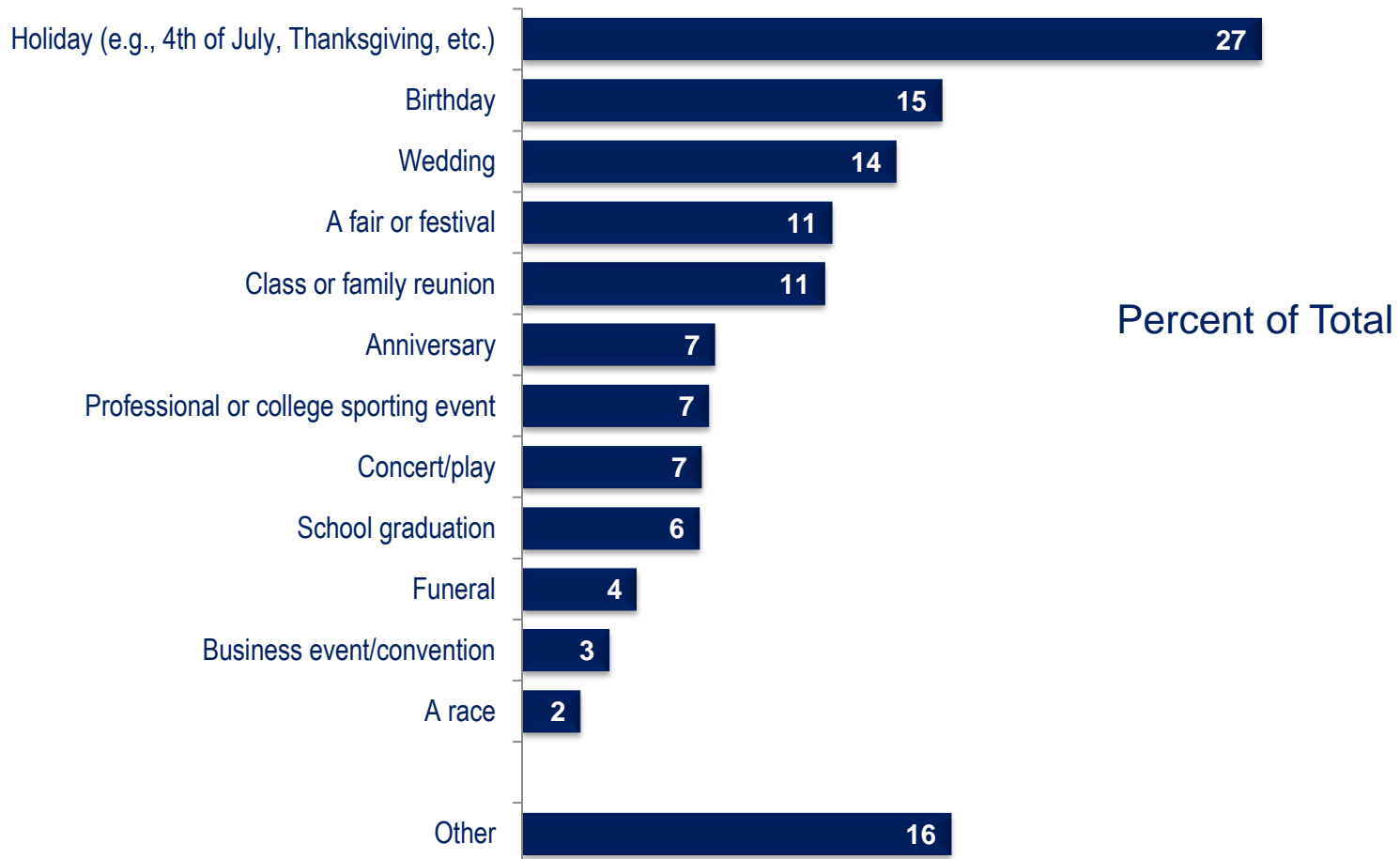
Base: Adult Overnight Trips to Pennsylvania



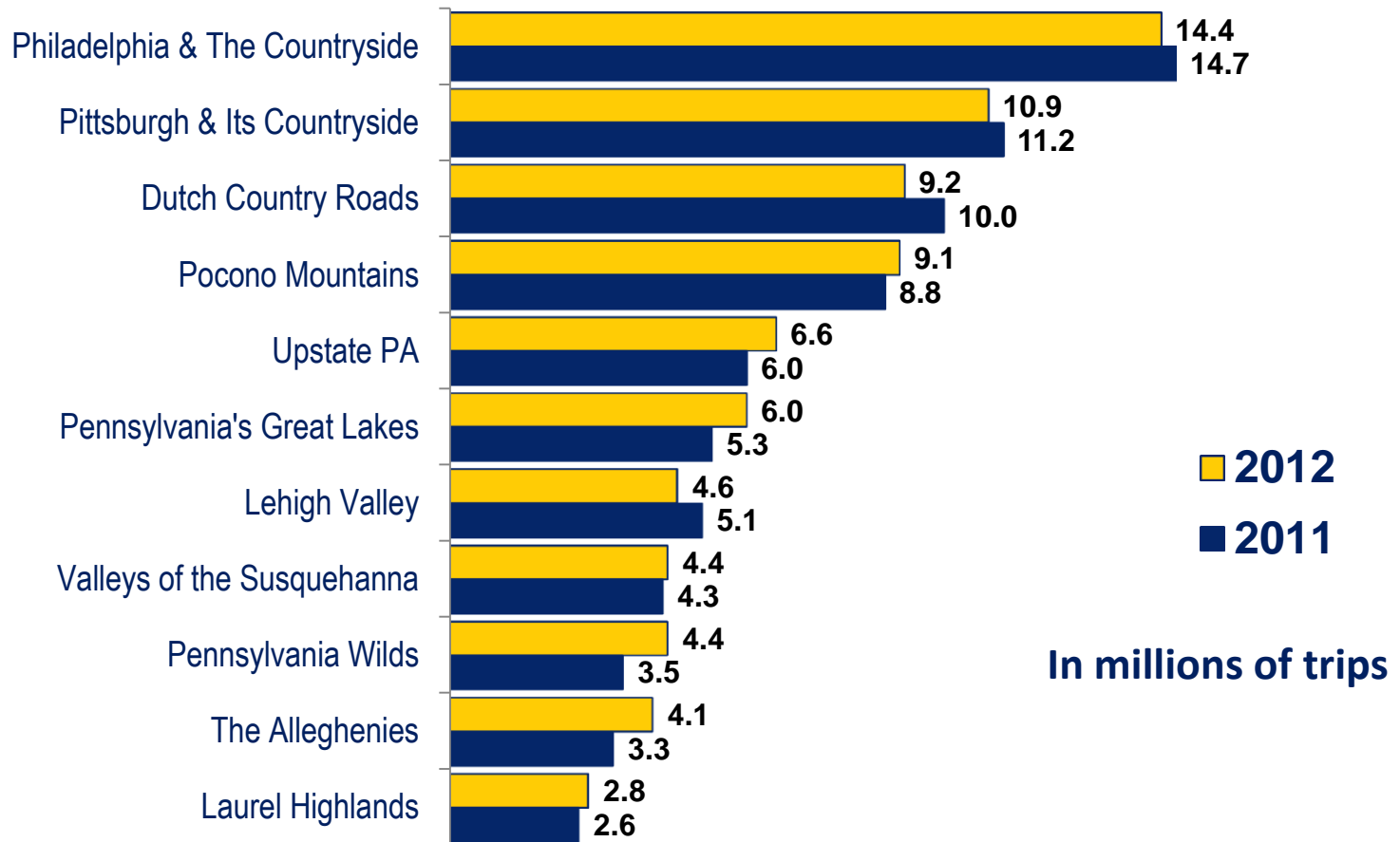
# Special Event Trip



Base: Adult Overnight Trips to Pennsylvania



# Regions Visited on Overnight Trips\*



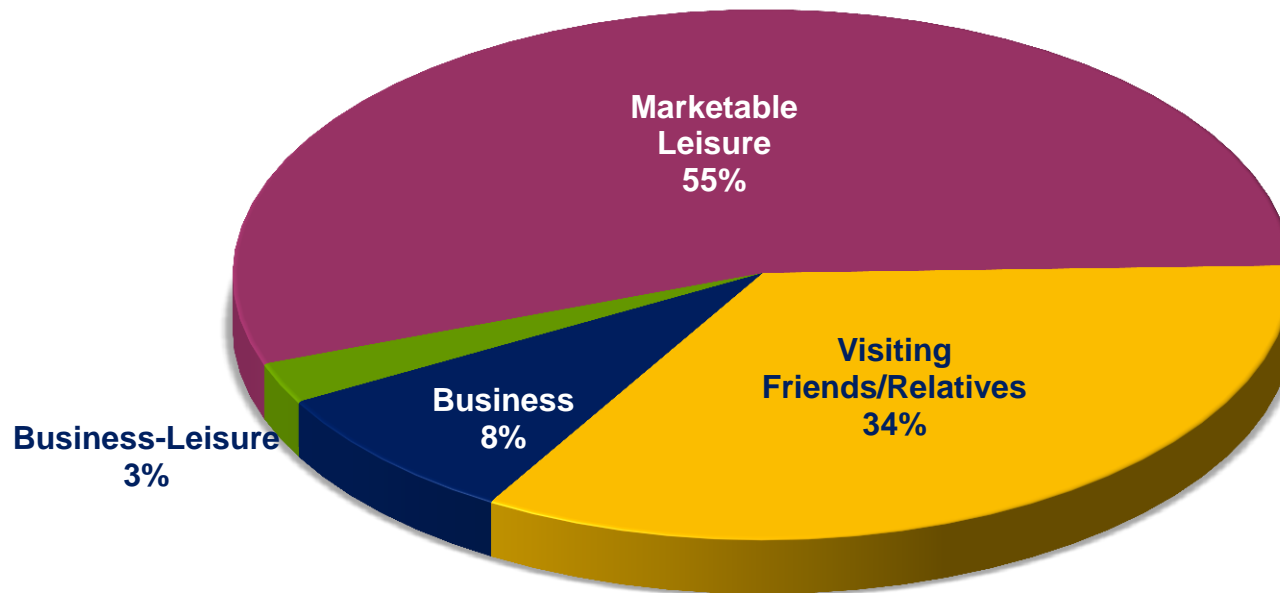
\*Spent time in region  
 Total will add to more than State total as a number of travelers visit more than one region.



# Pennsylvania's Day-Trip Market Segments



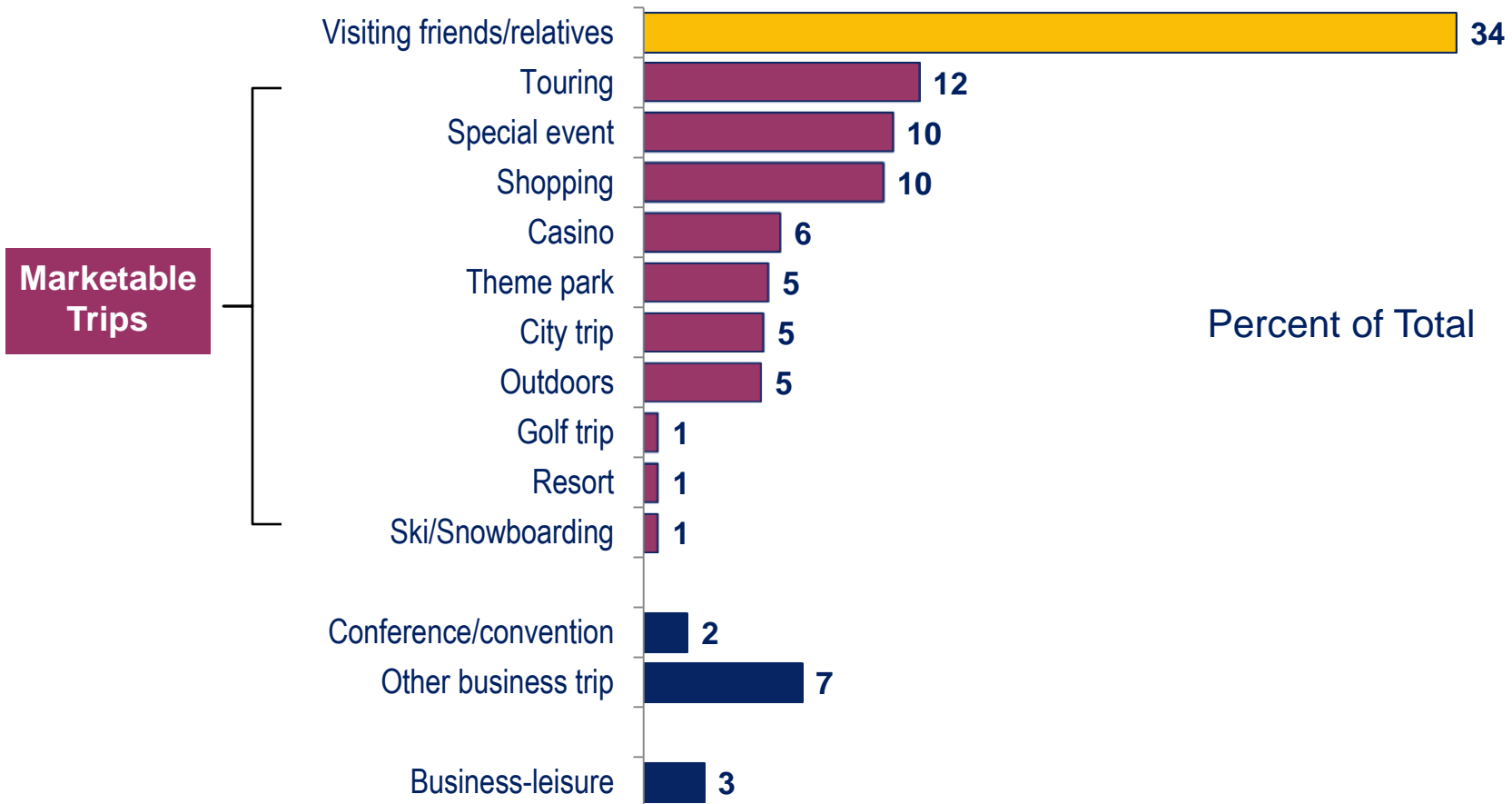
Base: Adult Day Trips to Pennsylvania



# Main Purpose of Pennsylvania 2012 Day-Trips



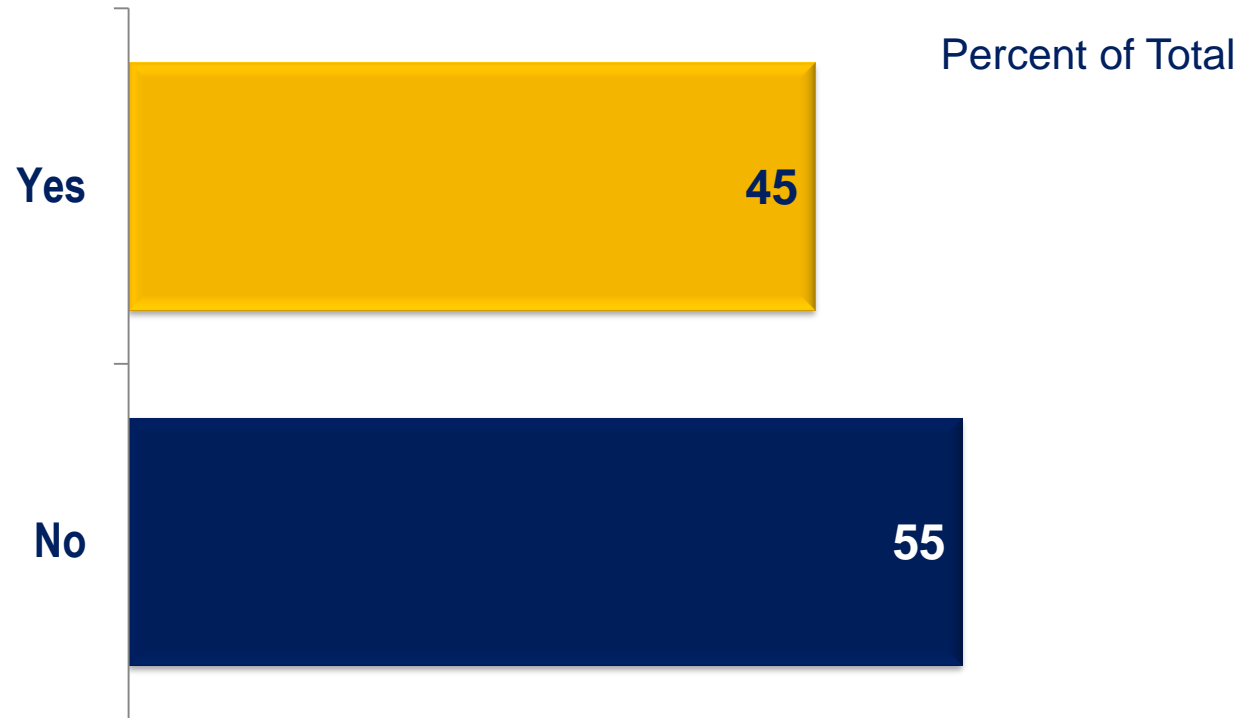
Base: Adult Day Trips



# Special Event Trip



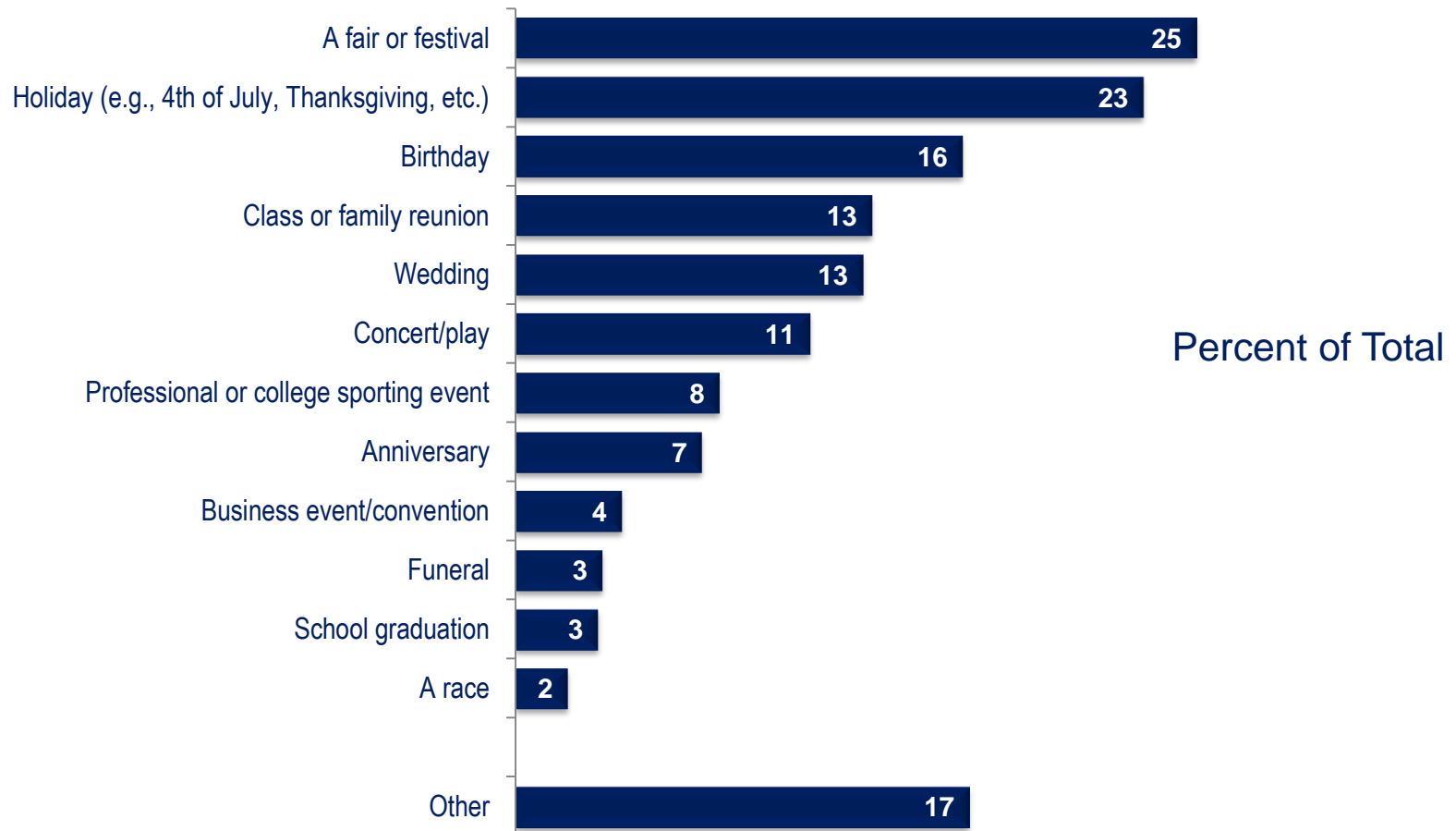
Base: Adult Day-Trips to Pennsylvania



# Special Event Trip



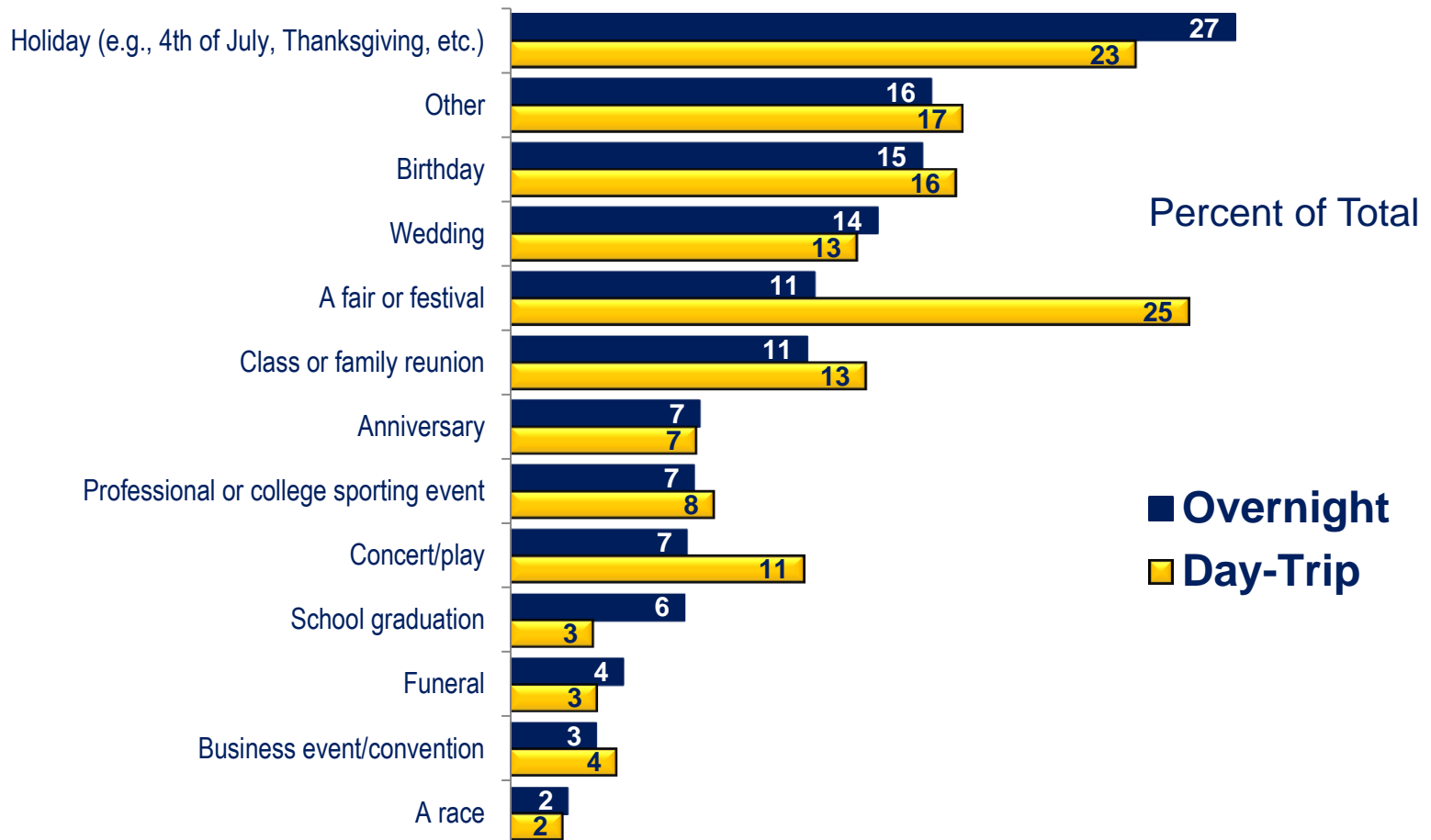
Base: Adult Day-Trips to Pennsylvania



# Special Event Trip



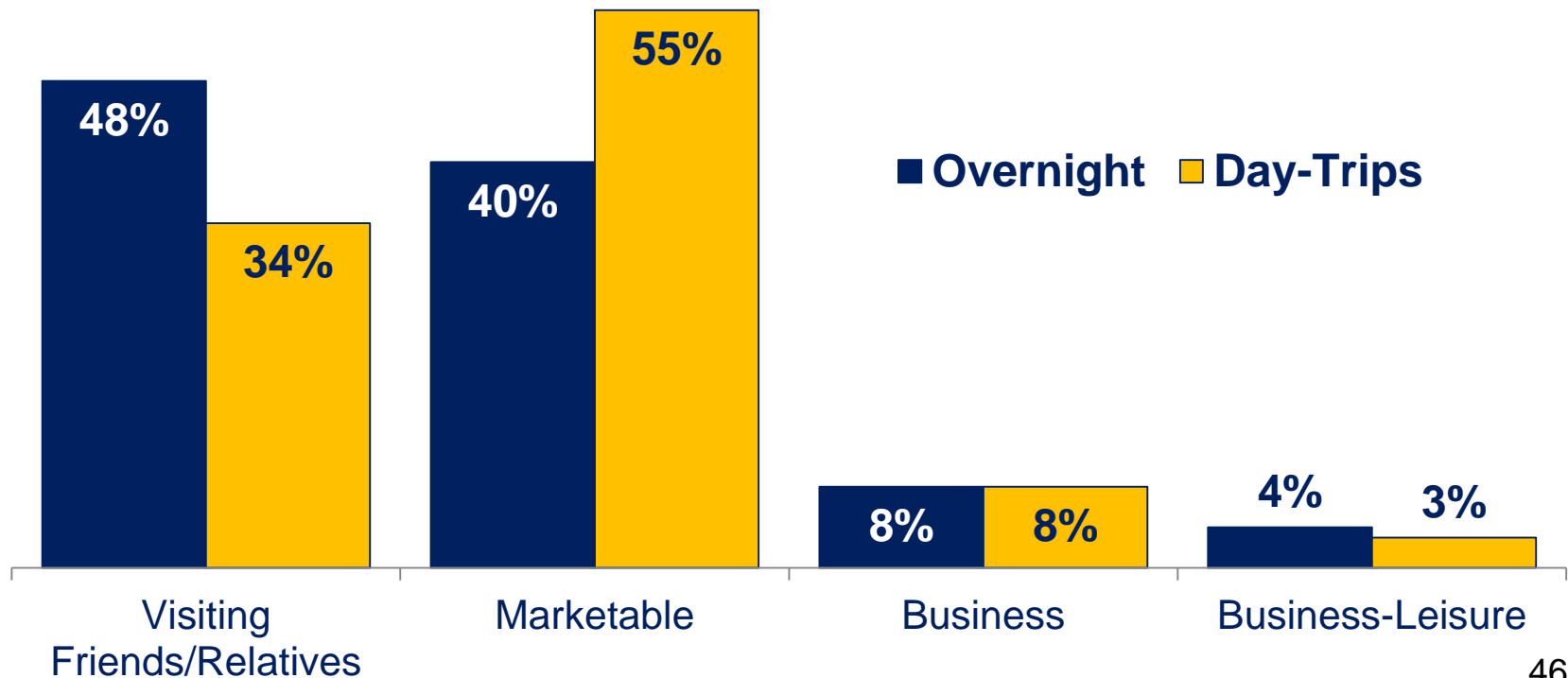
Base: Adult Overnight Trips to Pennsylvania



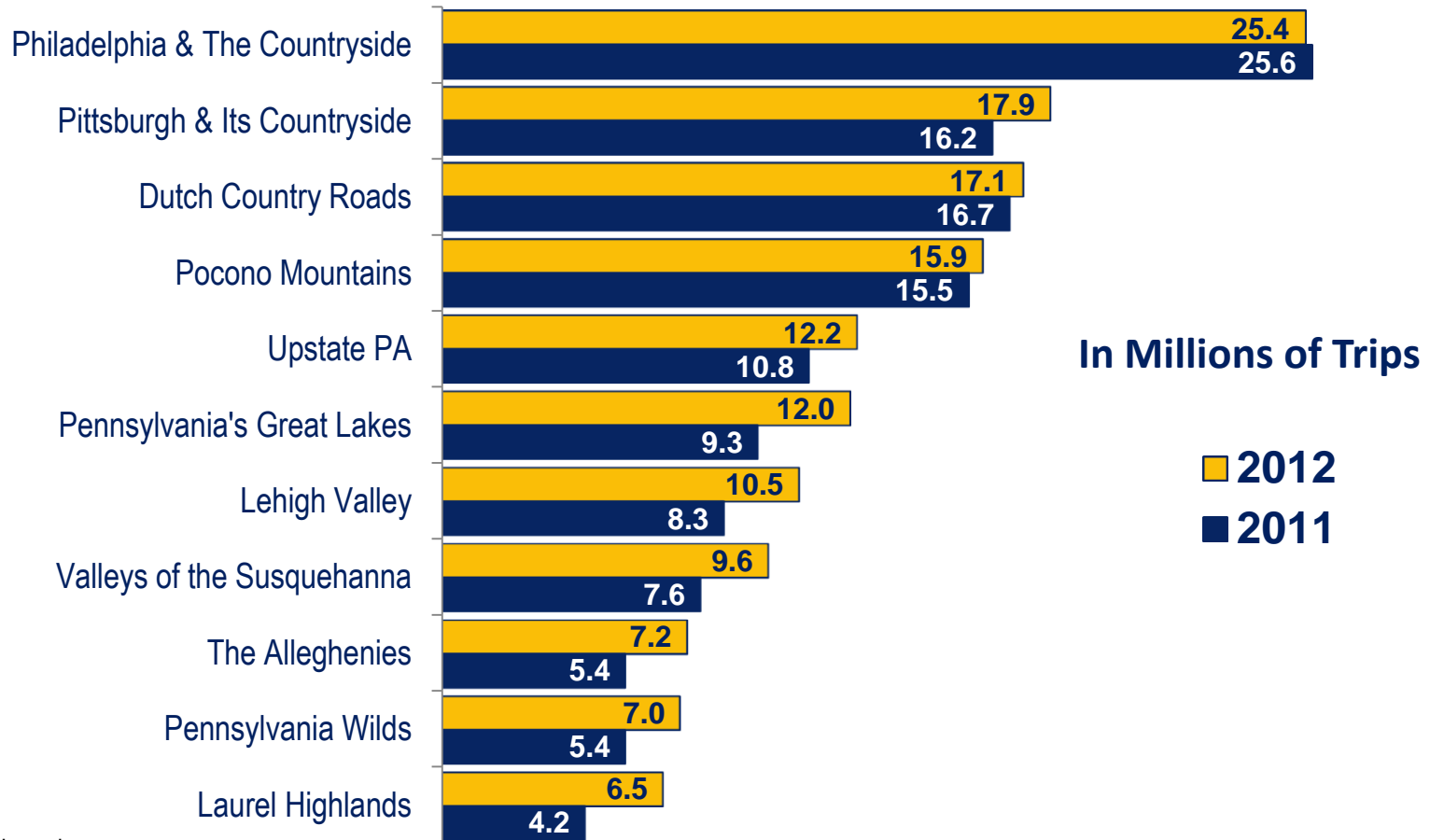
# Pennsylvania 2012 Purpose of Stay Comparison between Overnight and Day-trip



The graph below illustrates the differences in the purpose of stay between PA's overnight and day-trip travelers in 2012, with day-trip travelers far more likely to travel for “marketable” leisure purposes, while overnight travelers were more likely to visit friends/relatives.



# 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 Marketable Overnight Trips**

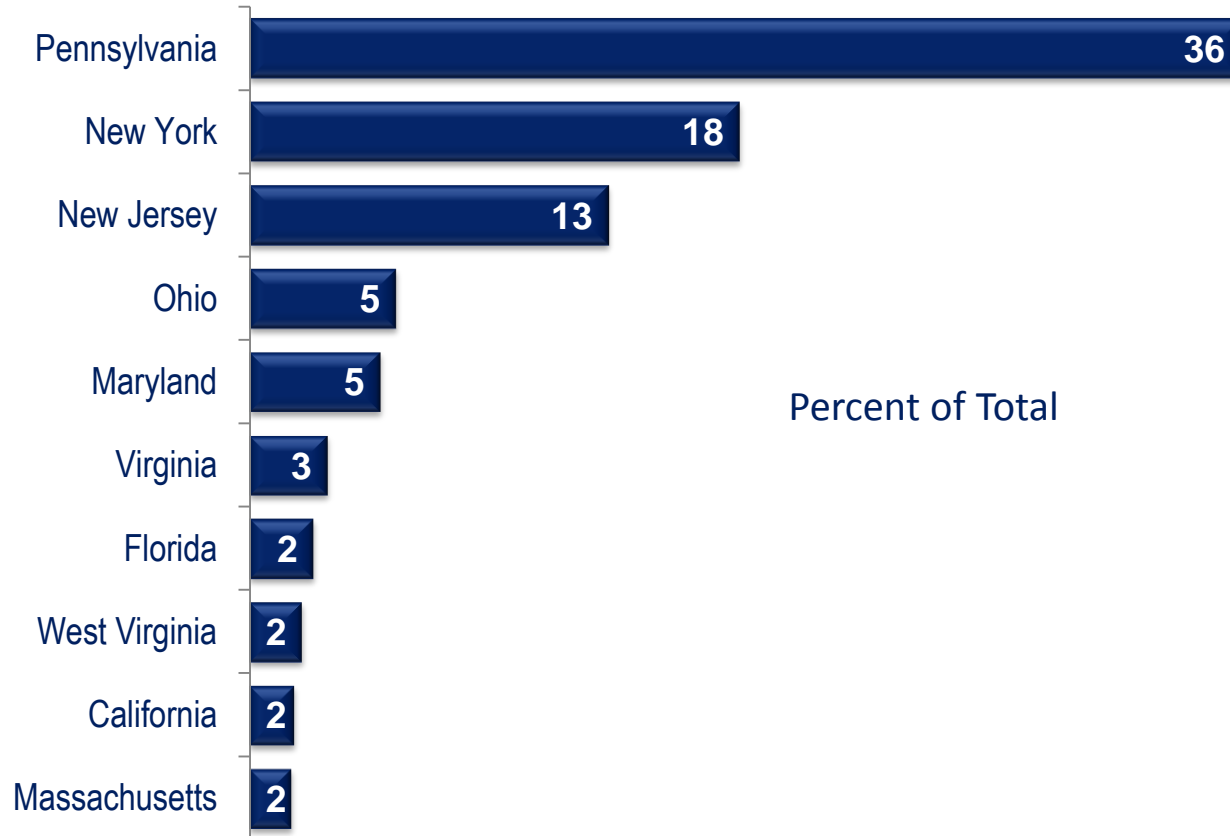


**Main Origin Markets for Pennsylvania  
Marketable Overnight Trips  
Business and Business/Leisure Trips**

# Main Origin States for Pennsylvania's Marketable Overnight Travelers



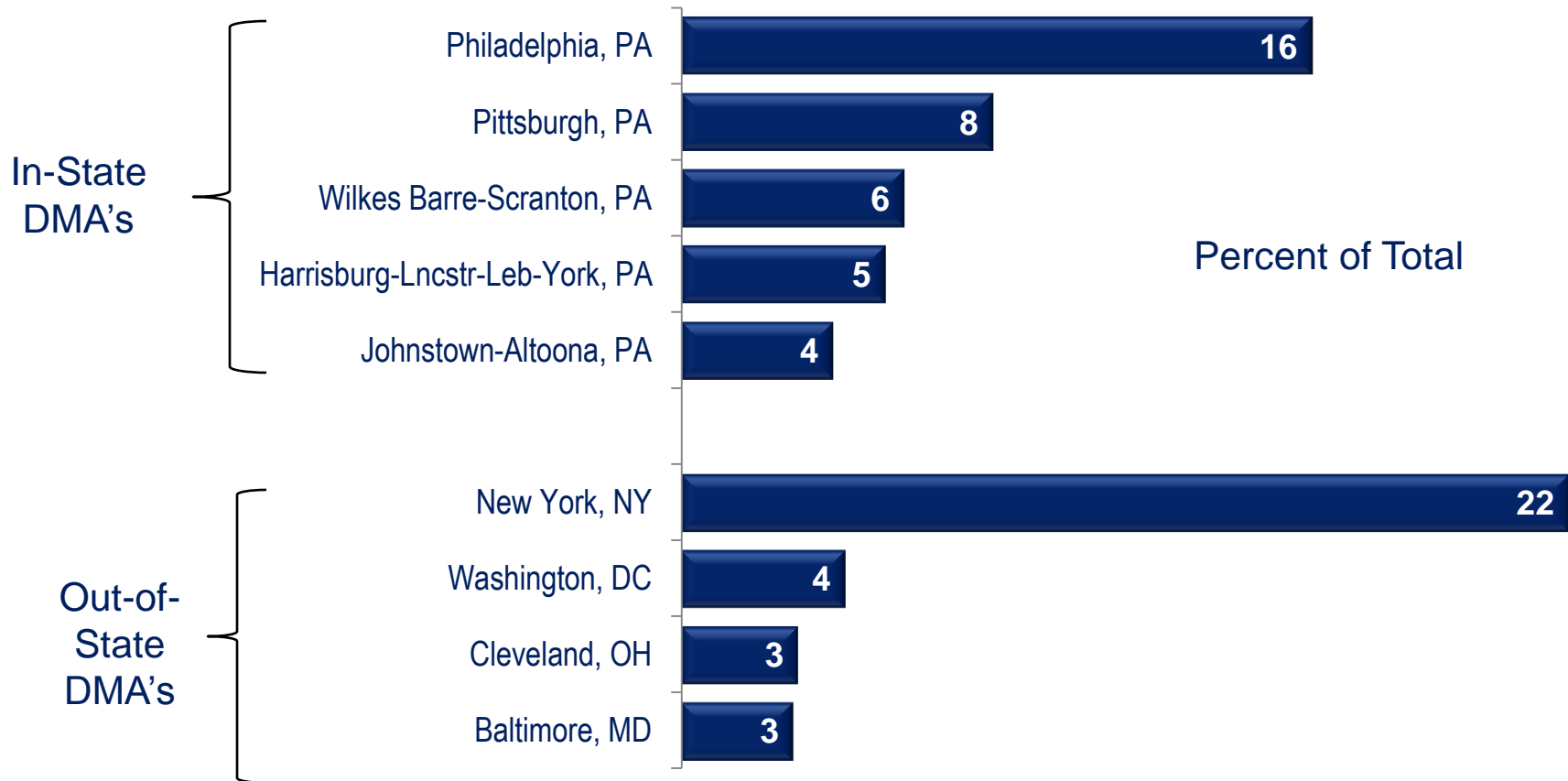
Base: Marketable Overnight Trips



# Main Urban Markets for Pennsylvania's Marketable Overnight Travelers



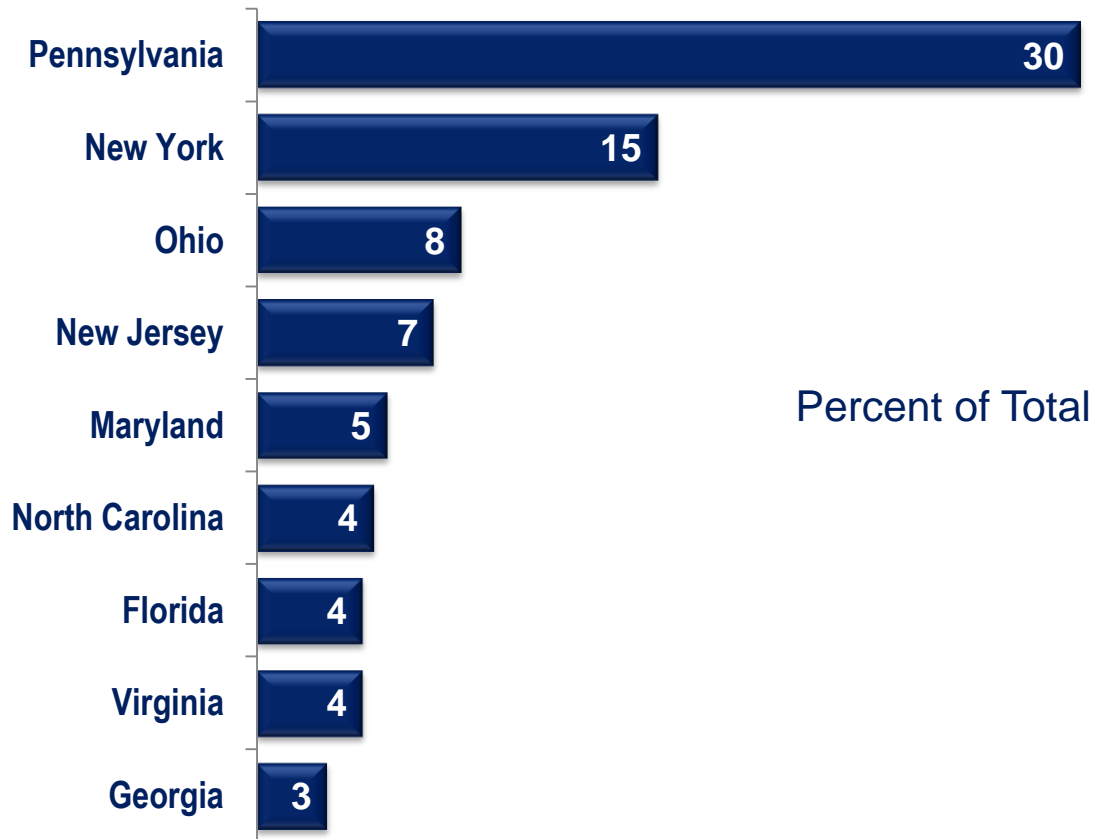
Base: Marketable Overnight Trips



# Main Origin States for Pennsylvania's Business Overnight Travelers



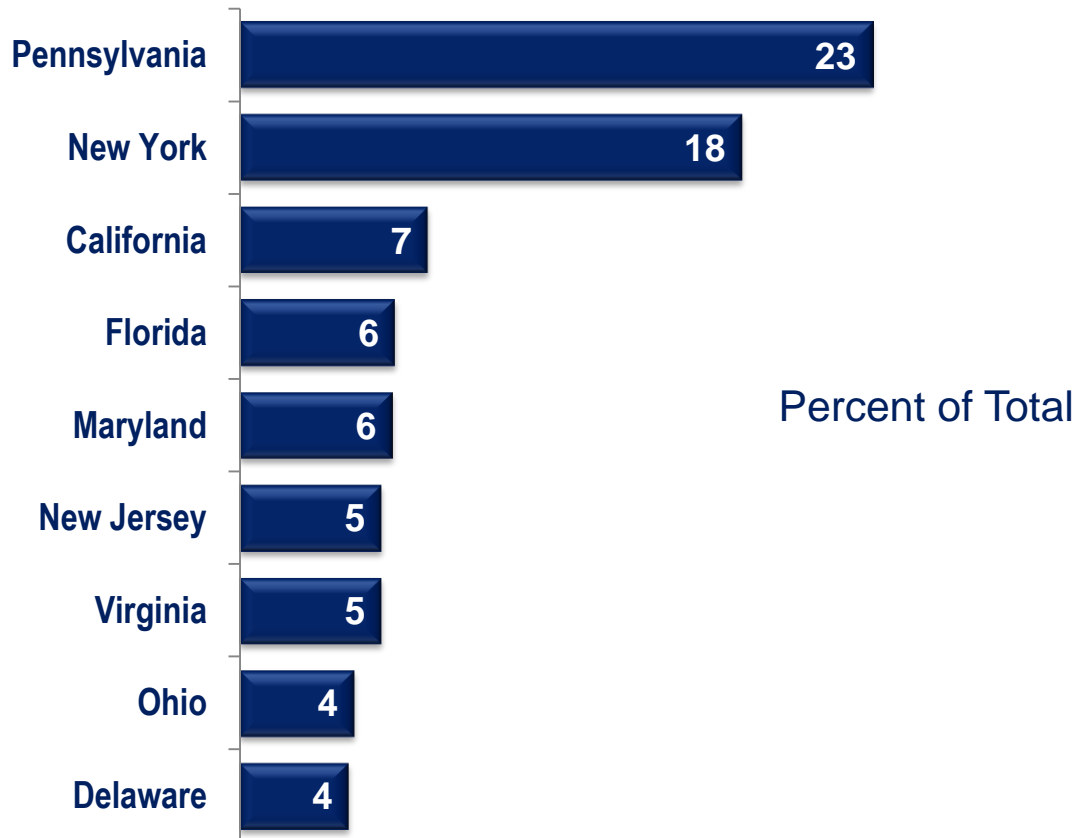
Base: Business Overnight Trips



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



Base: Business-Leisure Overnight Trips



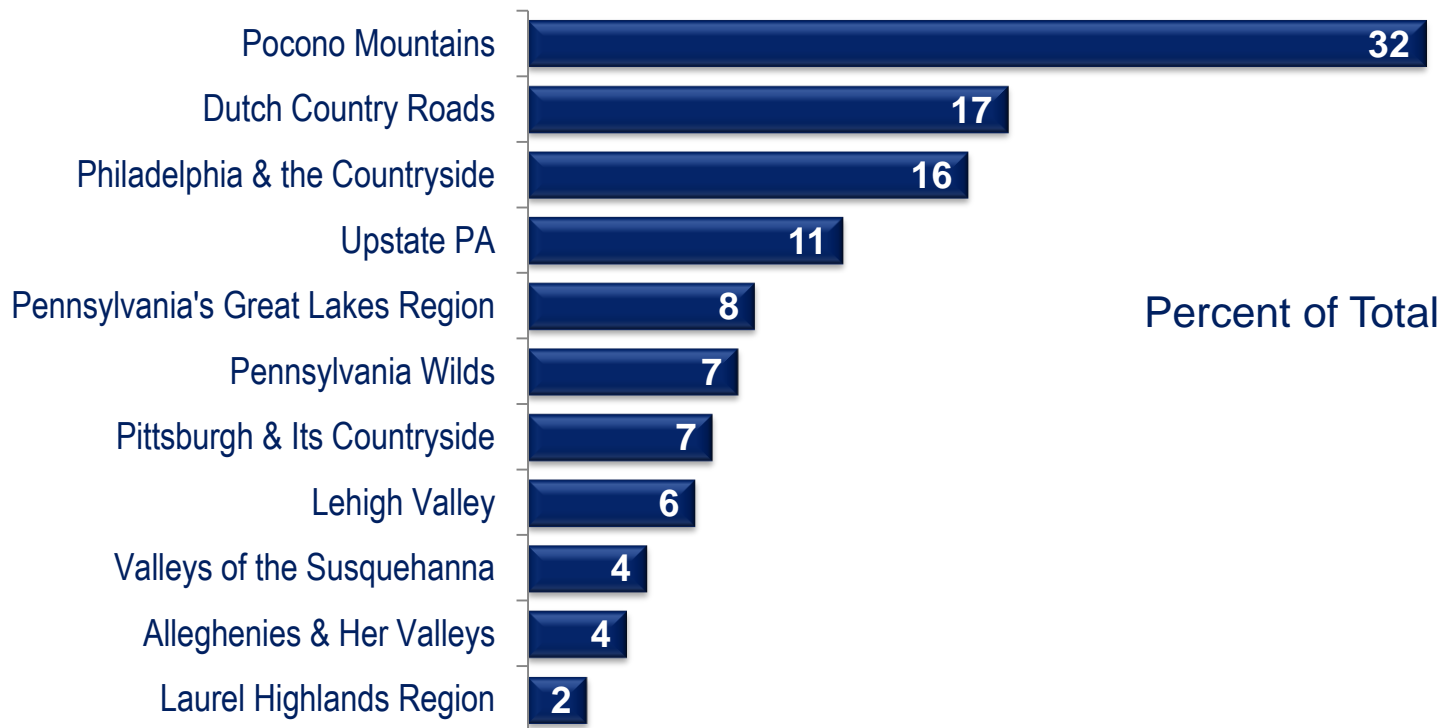
# **Pennsylvania Tourism Regions Visited by Origin Market**

# Pennsylvania Tourism Regions Visited by New York Residents



Base: Marketable Overnight Trips

*The Pocono Mountains region was the most popular PA destination for marketable overnight travelers from New York state in 2012, followed by Dutch Country Roads.*

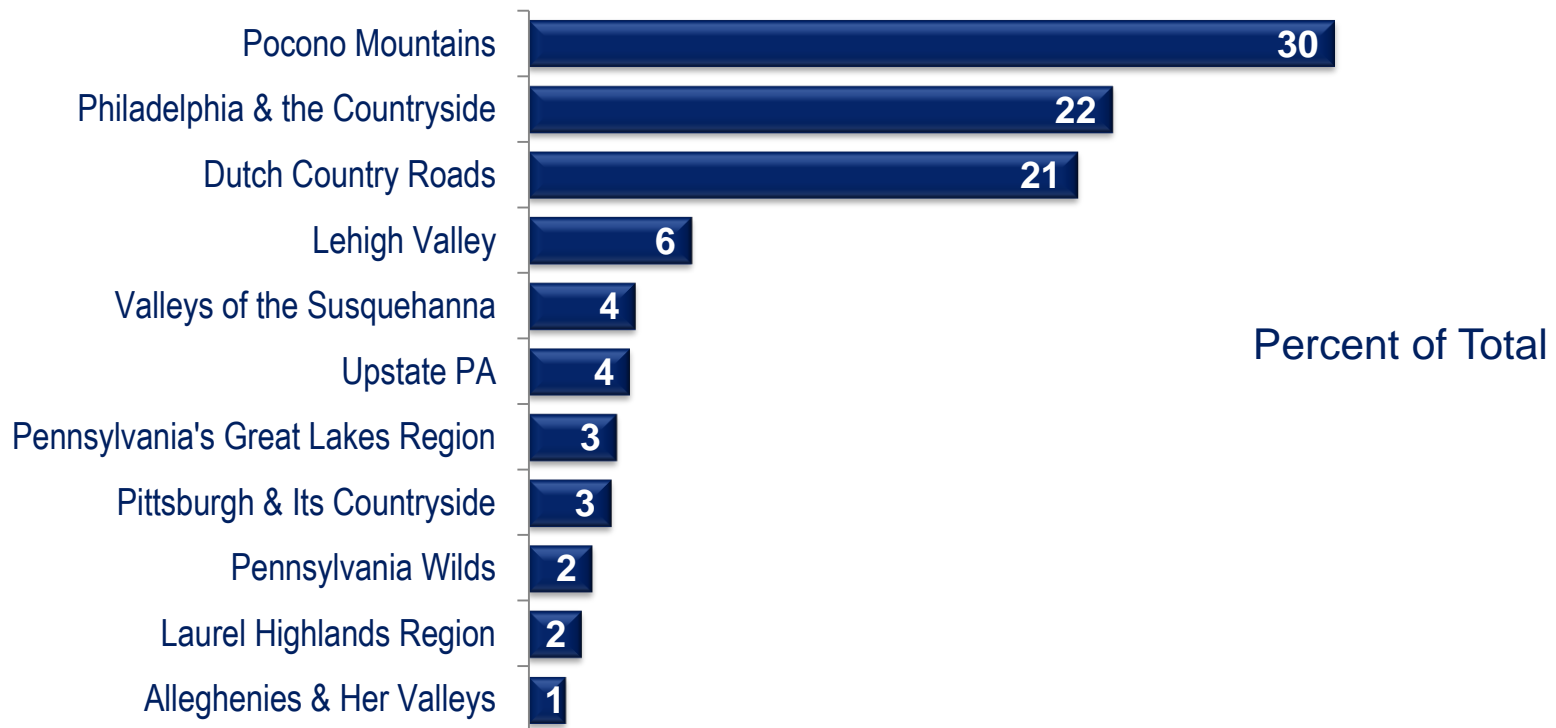


# Pennsylvania Tourism Regions Visited by New Jersey Residents



Base: Marketable Overnight Trips

*The Pocono Mountains was the most popular PA destination for marketable overnight travelers from New Jersey in 2012, followed by the Philadelphia & the Countryside region.*



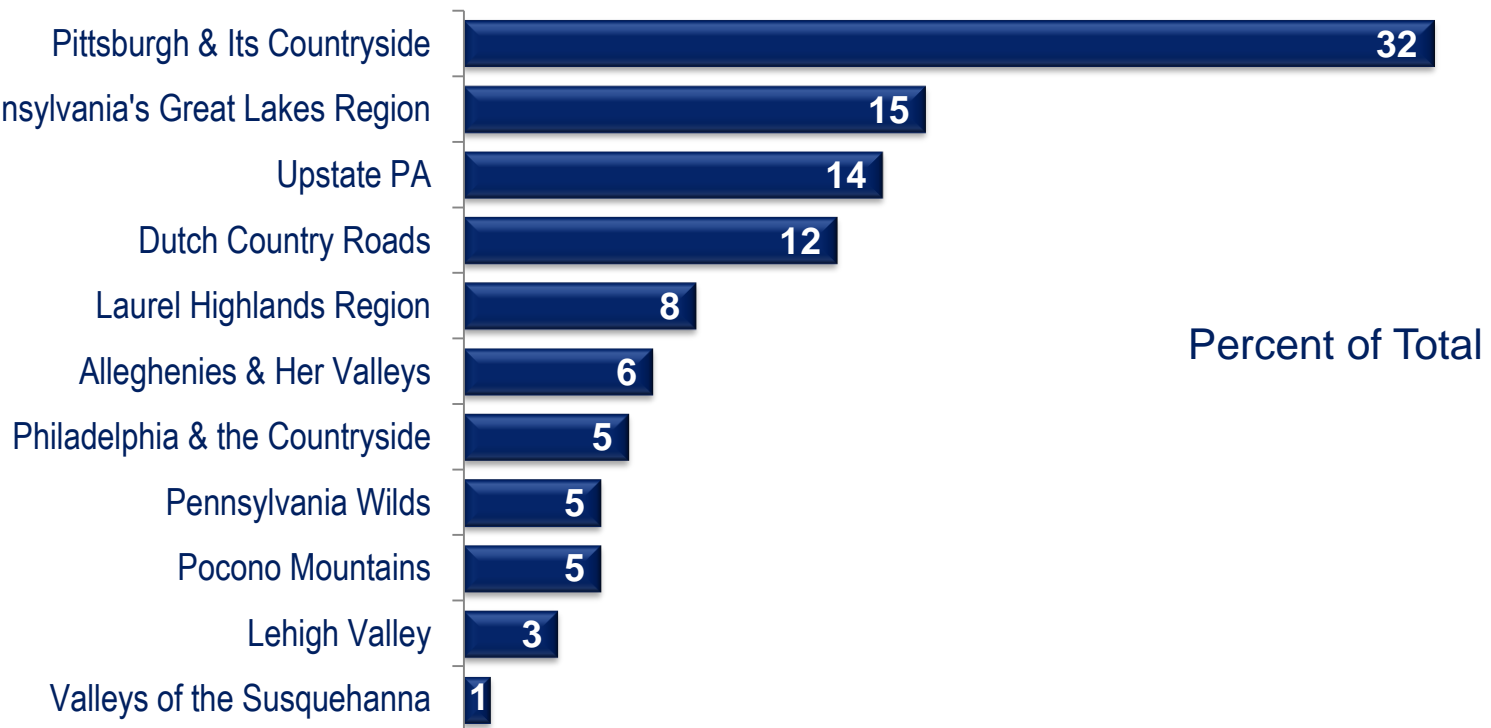


# Pennsylvania Tourism Regions Visited by Ohio Residents



Base: Marketable Overnight Trips

*Pittsburgh & Its Countryside region was the most popular PA destination for marketable overnight travelers from Ohio in 2012, followed by Pennsylvania's Great Lakes Region.*

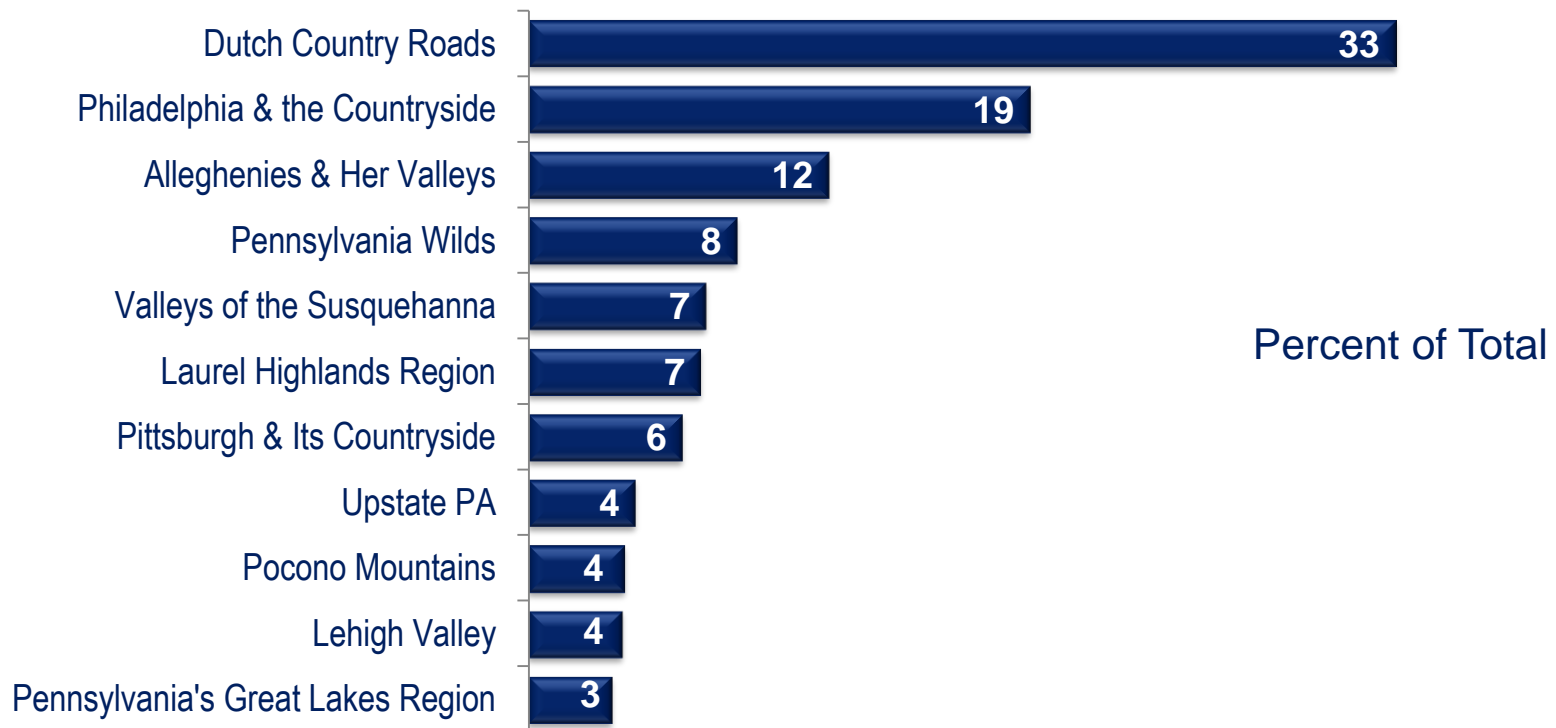


# Pennsylvania Tourism Regions Visited by Maryland Residents



Base: Marketable Overnight Trips

*The Dutch Country Roads region was, by far, the most popular PA destination for marketable overnight travelers from Maryland in 2012.*

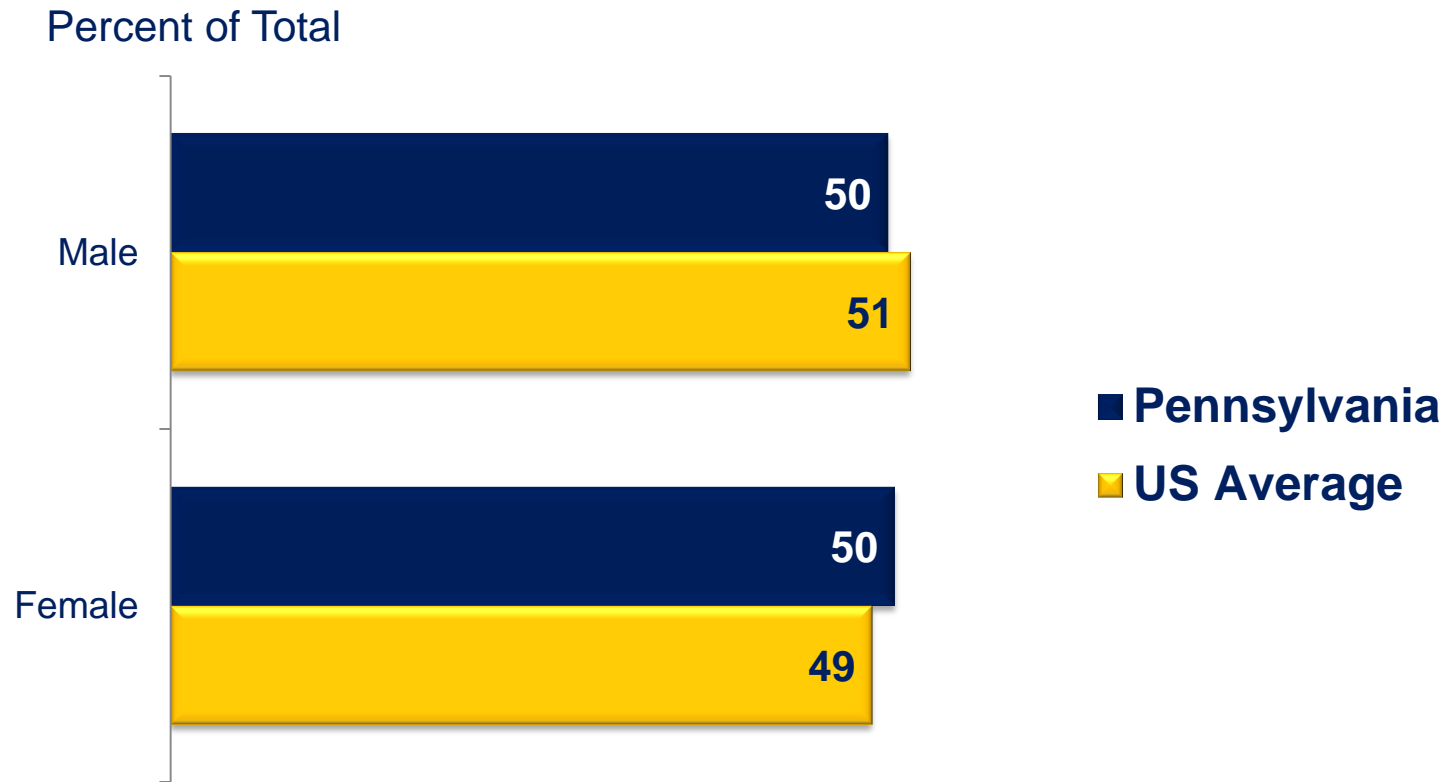


# **Traveler Profile — Overnight Marketable Trips**

# Gender



Base: Overnight Marketable Trips

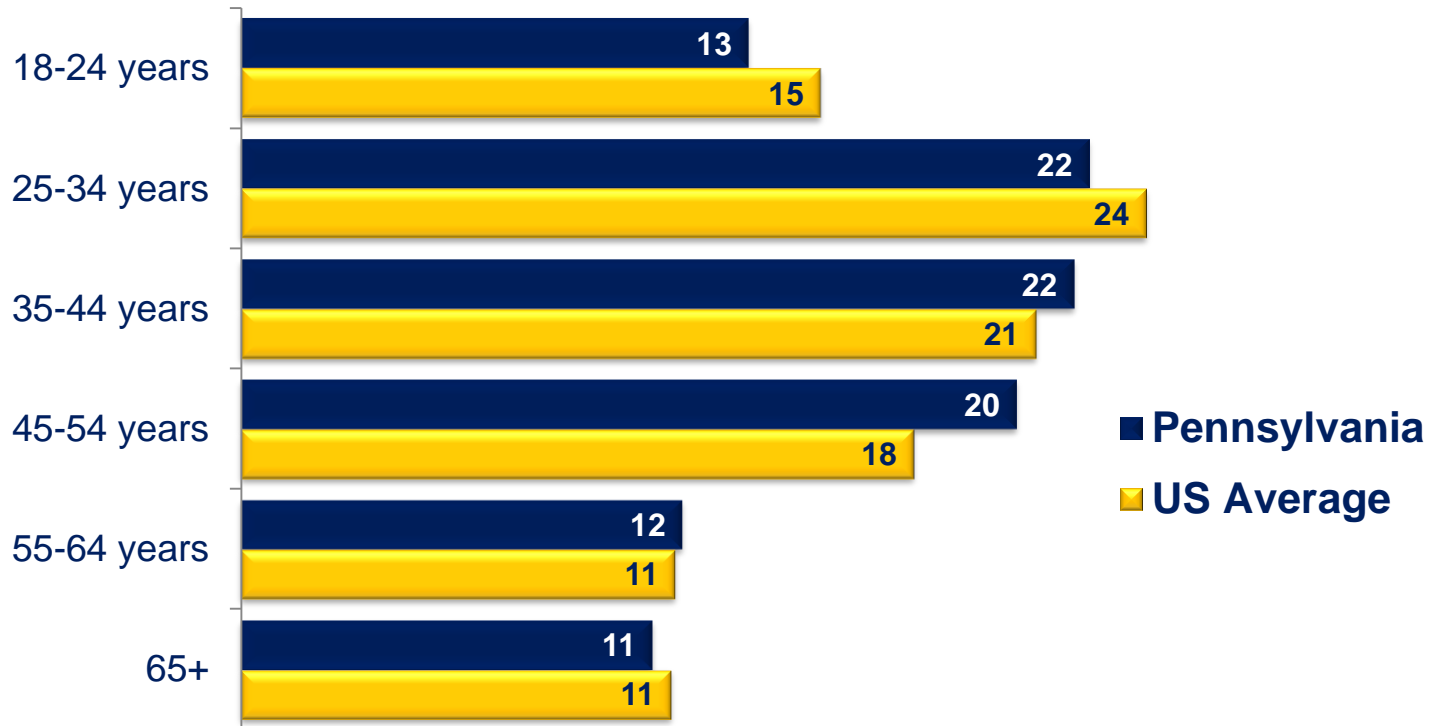


# Age



Base: Overnight Marketable Trips

## Percent of Total



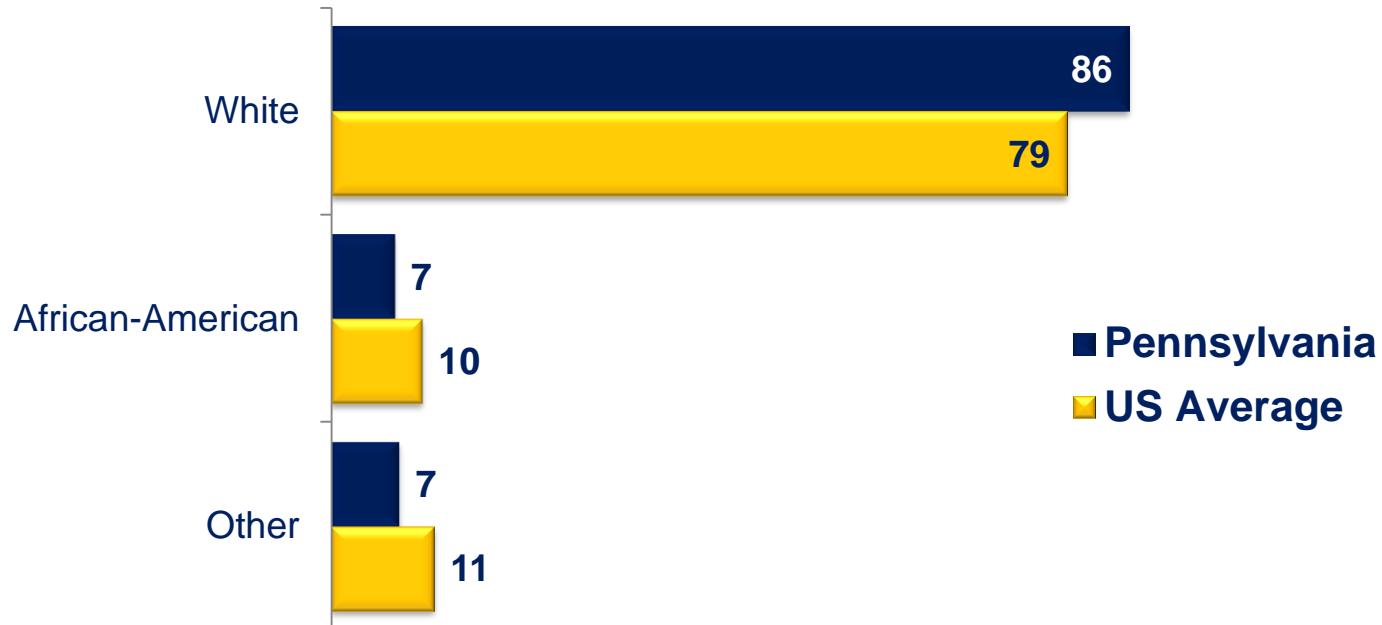
Average Age      Pennsylvania      US  
42.8      42.2

# Race



Base: Overnight Marketable Trips

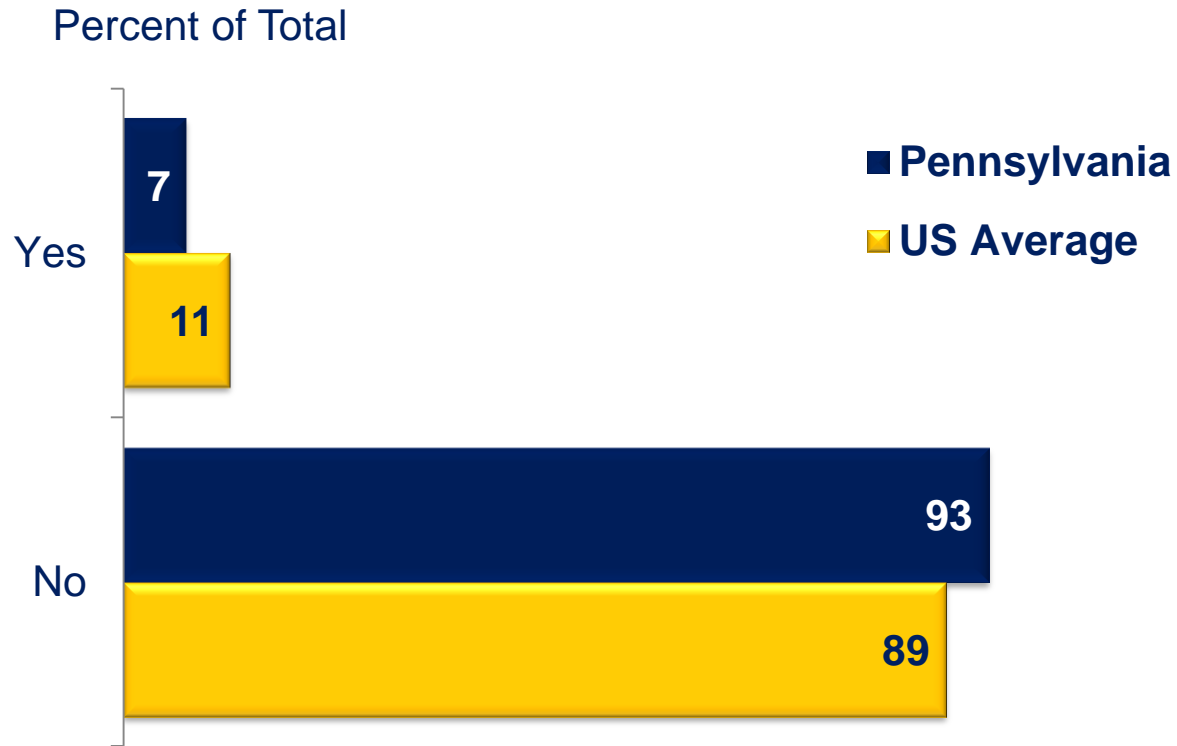
## Percent of Total



# Hispanic Background



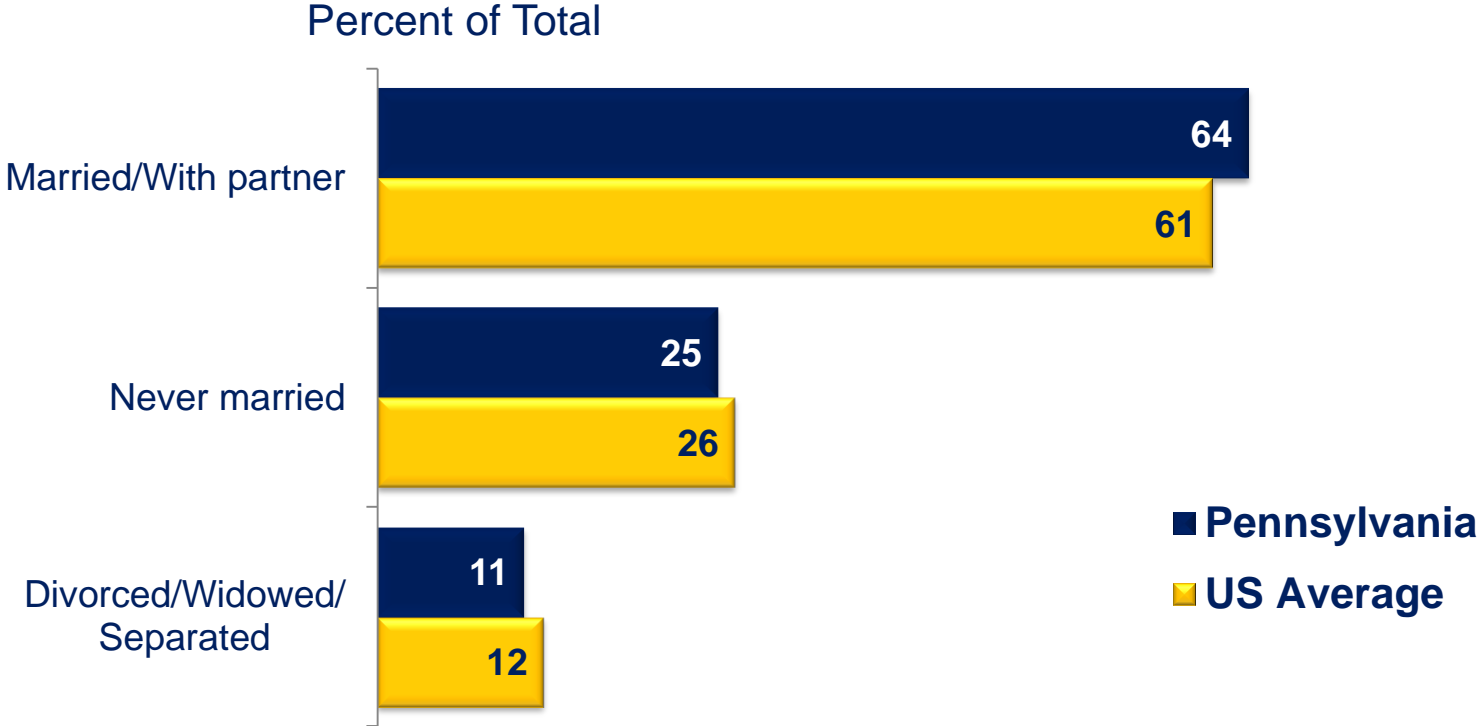
Base: Overnight Marketable Trips



# Marital Status



Base: Overnight Marketable Trips



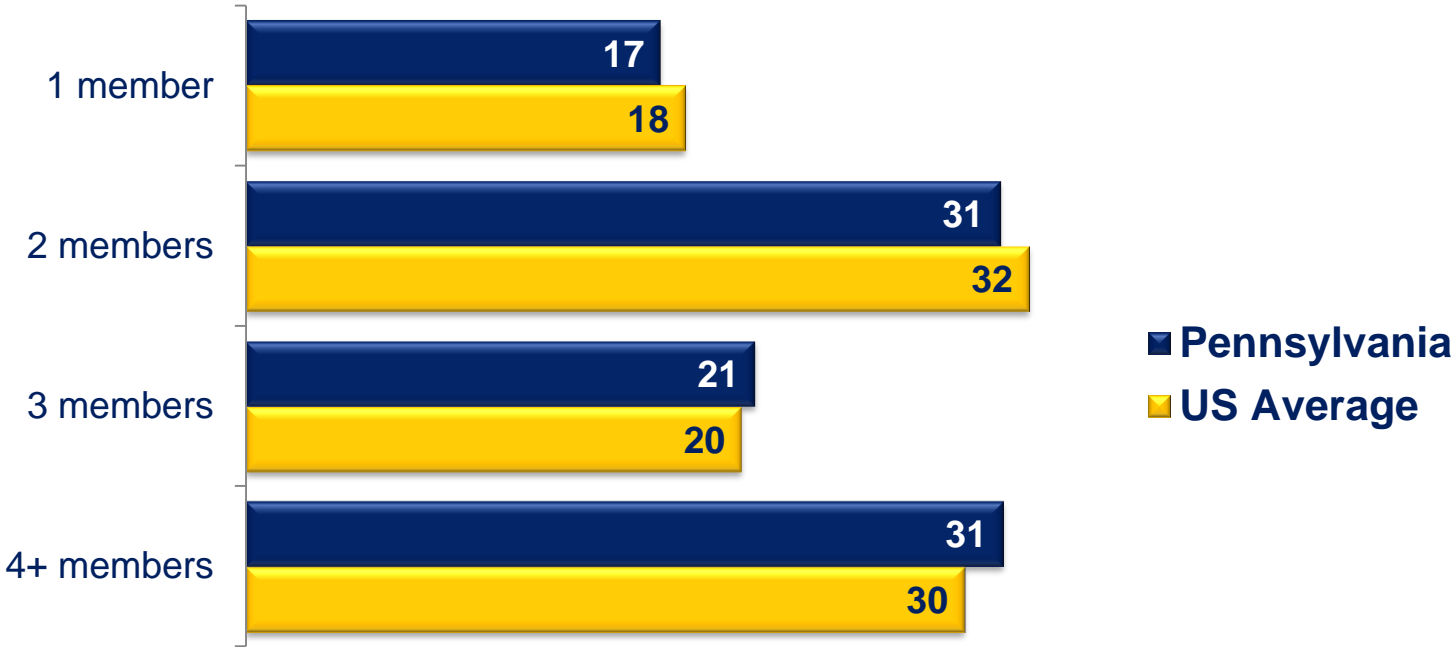


# Household Size



Base: Overnight Marketable Trips

Percent of Total



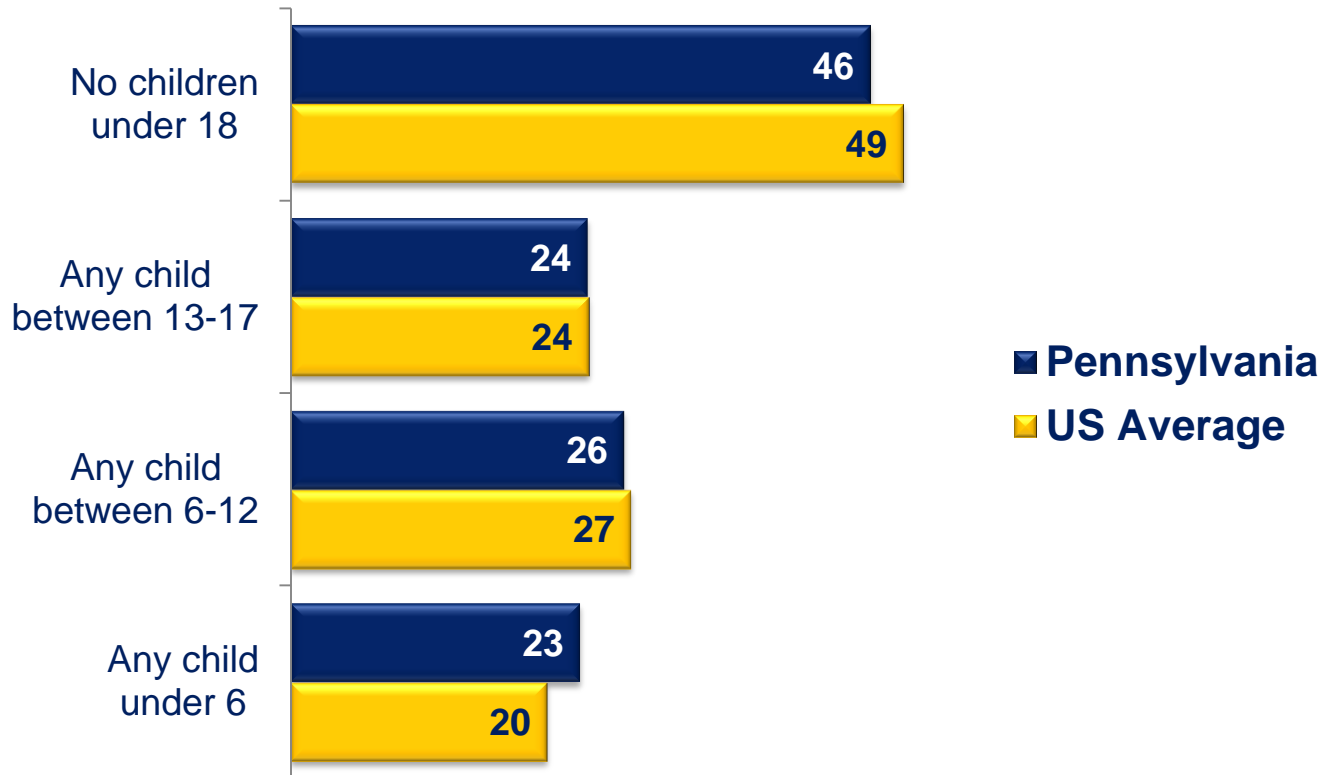
Average Household Size: Pennsylvania 3.0      United States 3.0

# Presence of Children in Household



Base: Overnight Marketable Trips

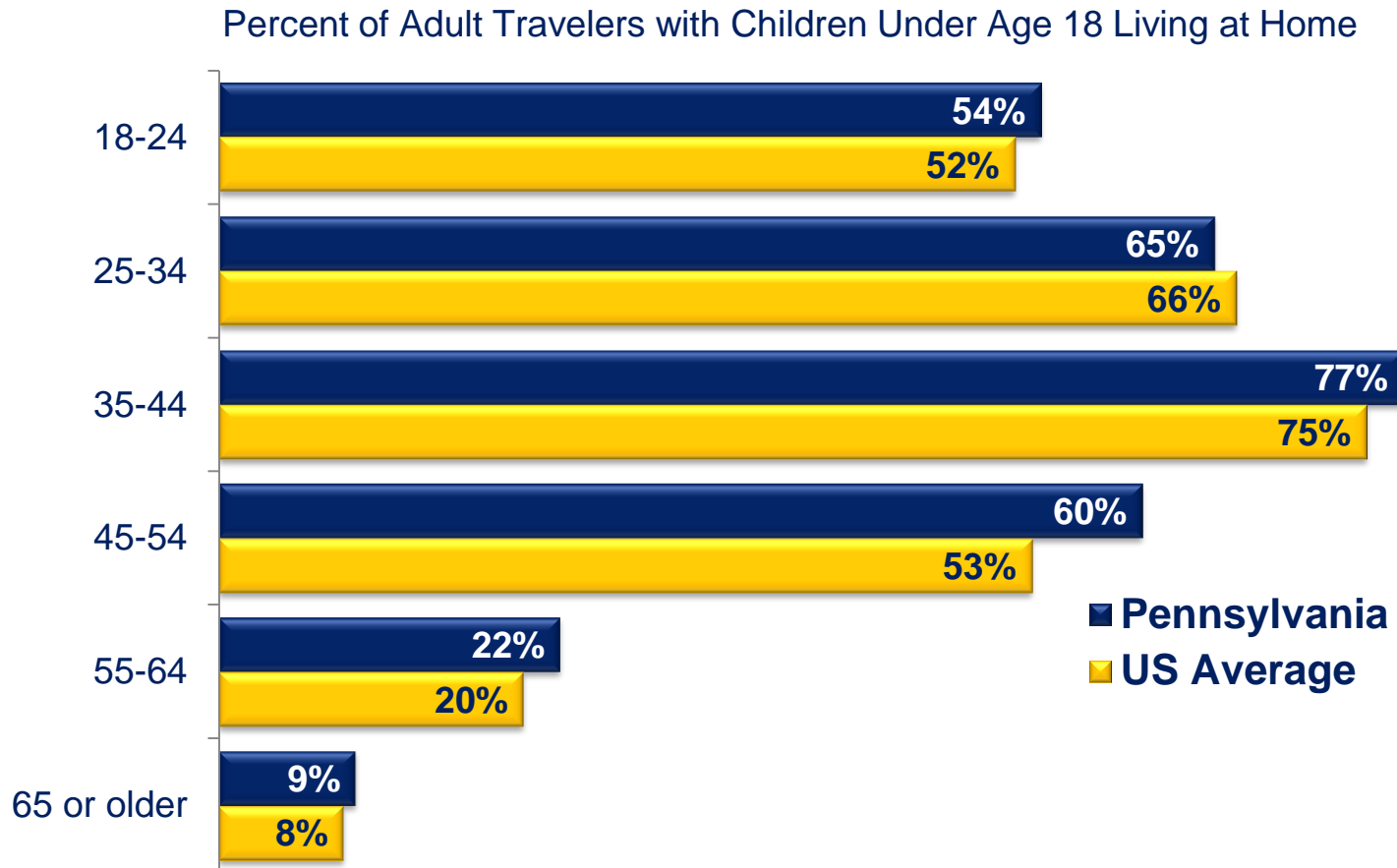
Percent of Adult Travelers with Children Under Age 18 Living at Home



# Presence of Children in Household by Age of Adult Traveler



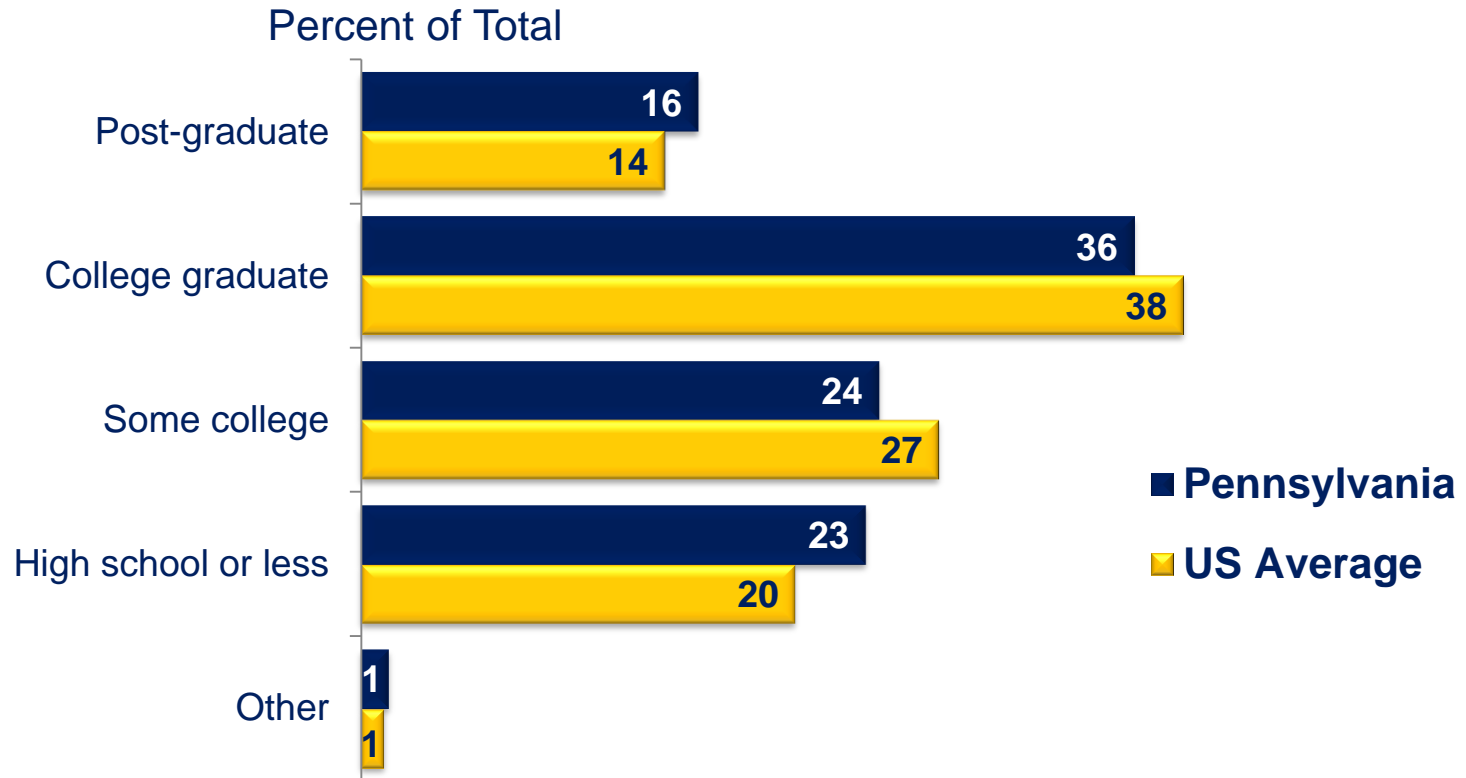
Base: Overnight Marketable Trips



# Education



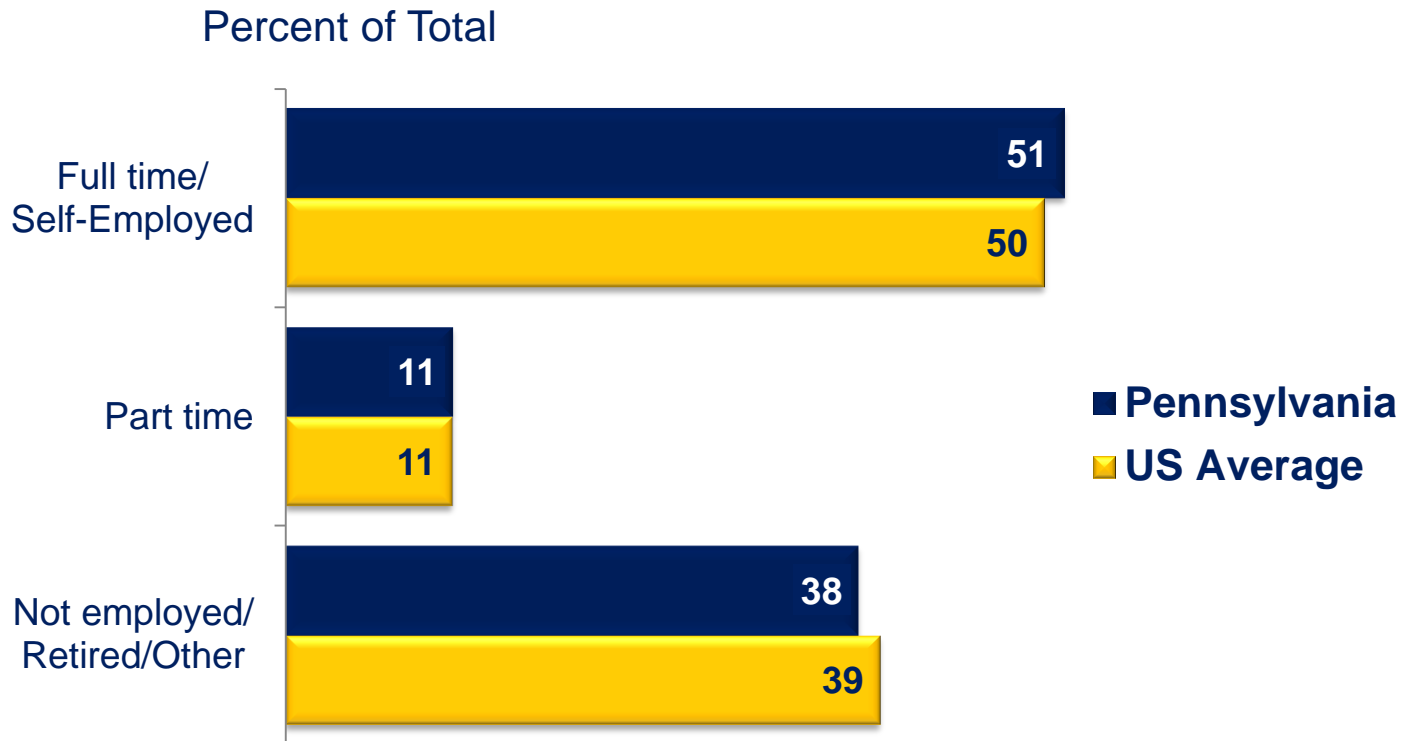
Base: Overnight Marketable Trips



# Employment



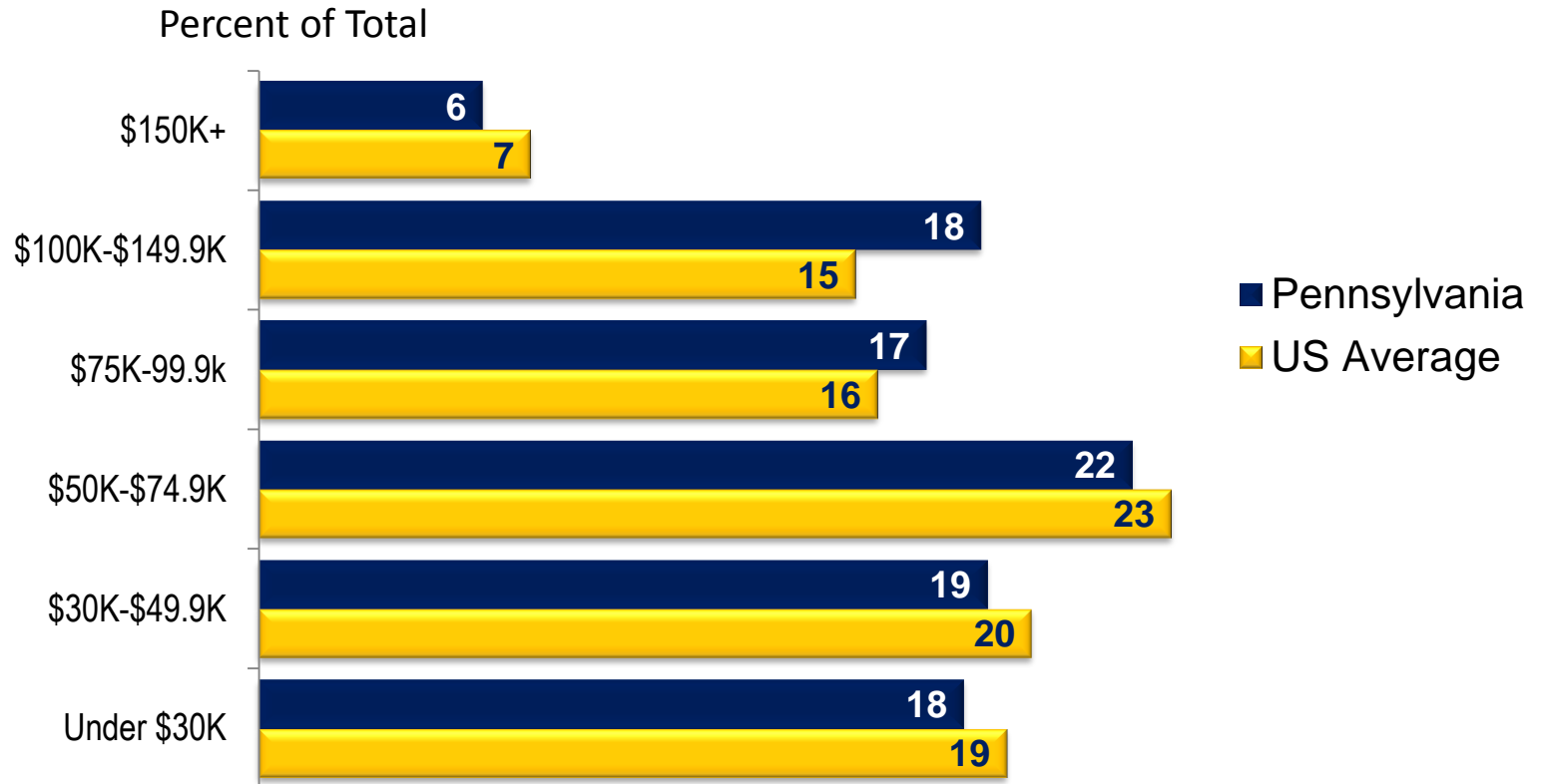
Base: Overnight Marketable Trips



# Income



Base: Overnight Marketable Trips



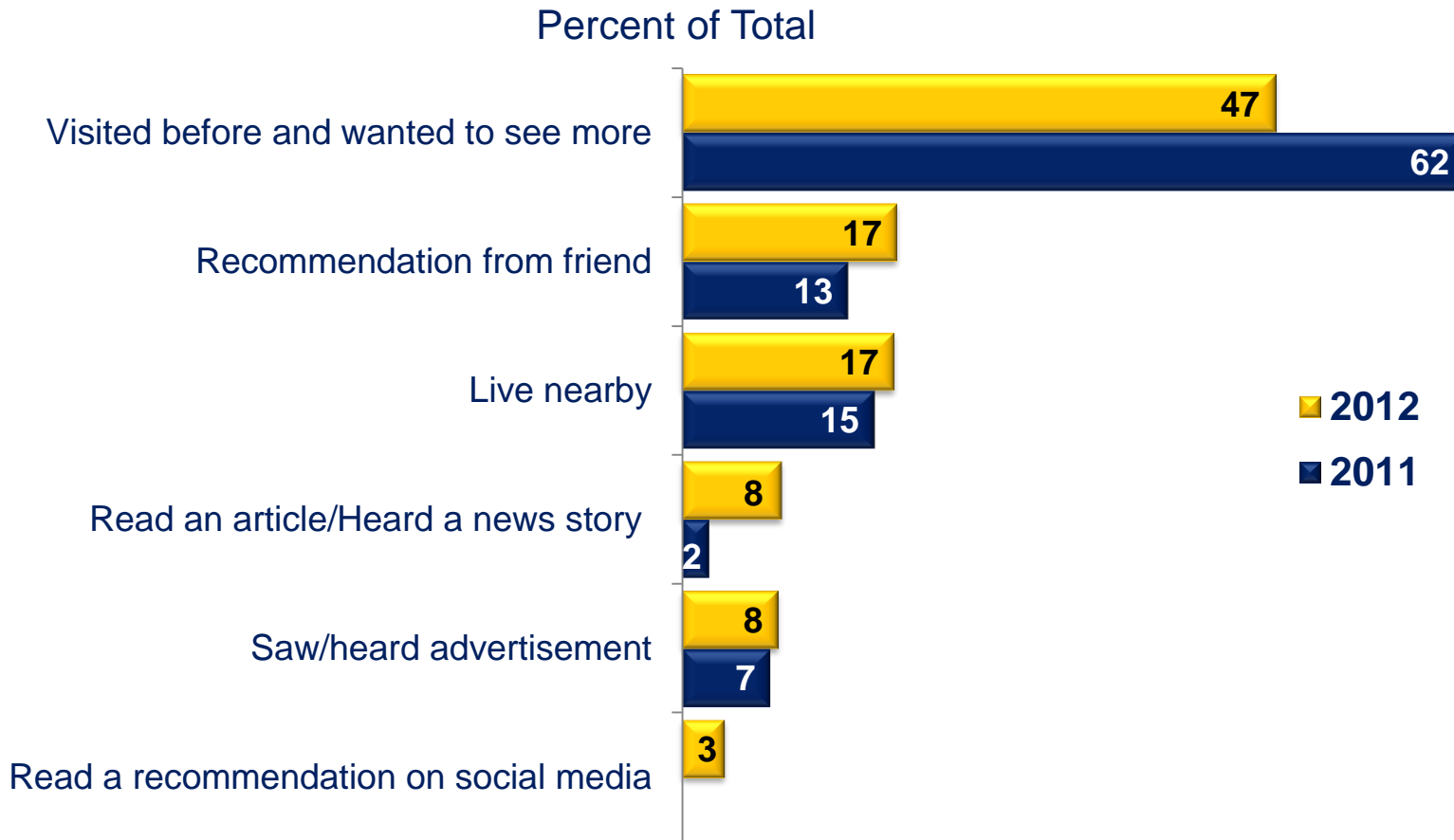
# **Trip Planning & Booking**

## **Pennsylvania Overnight Marketable Trips**

# Main Reason for Choosing Pennsylvania



Base: Overnight Marketable Trips



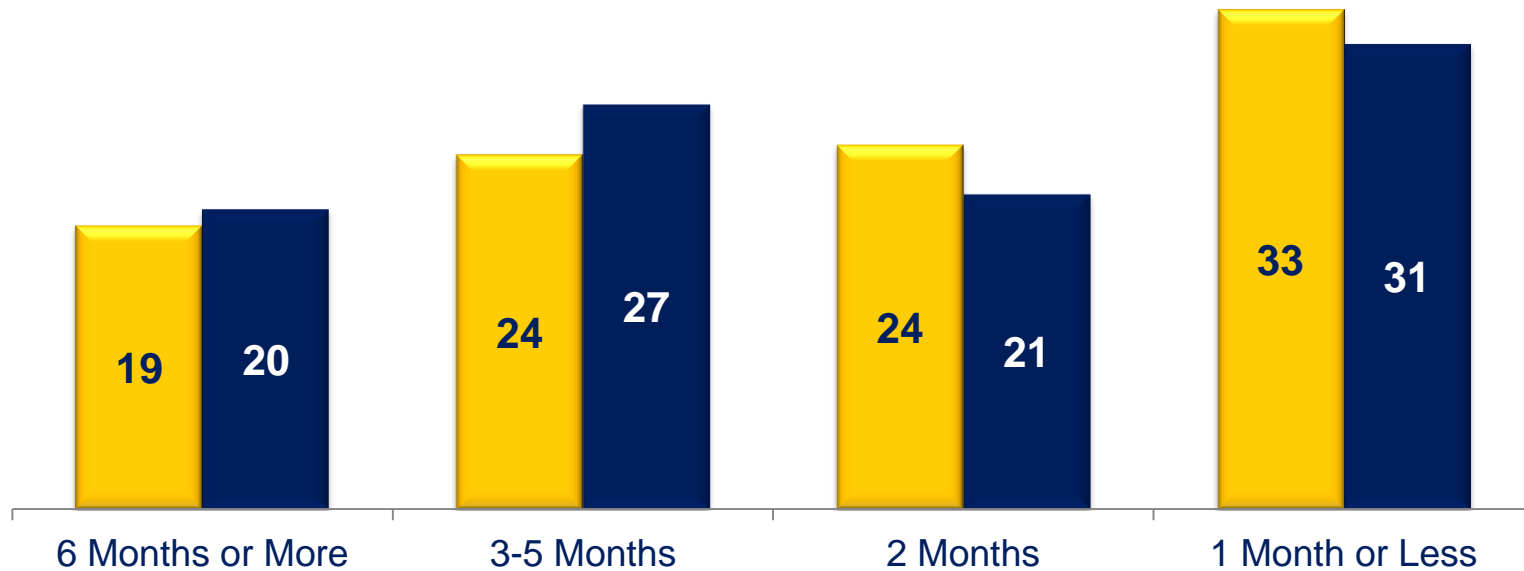


# Planning Cycle



Base: Overnight Marketable Trips

Percent of Total



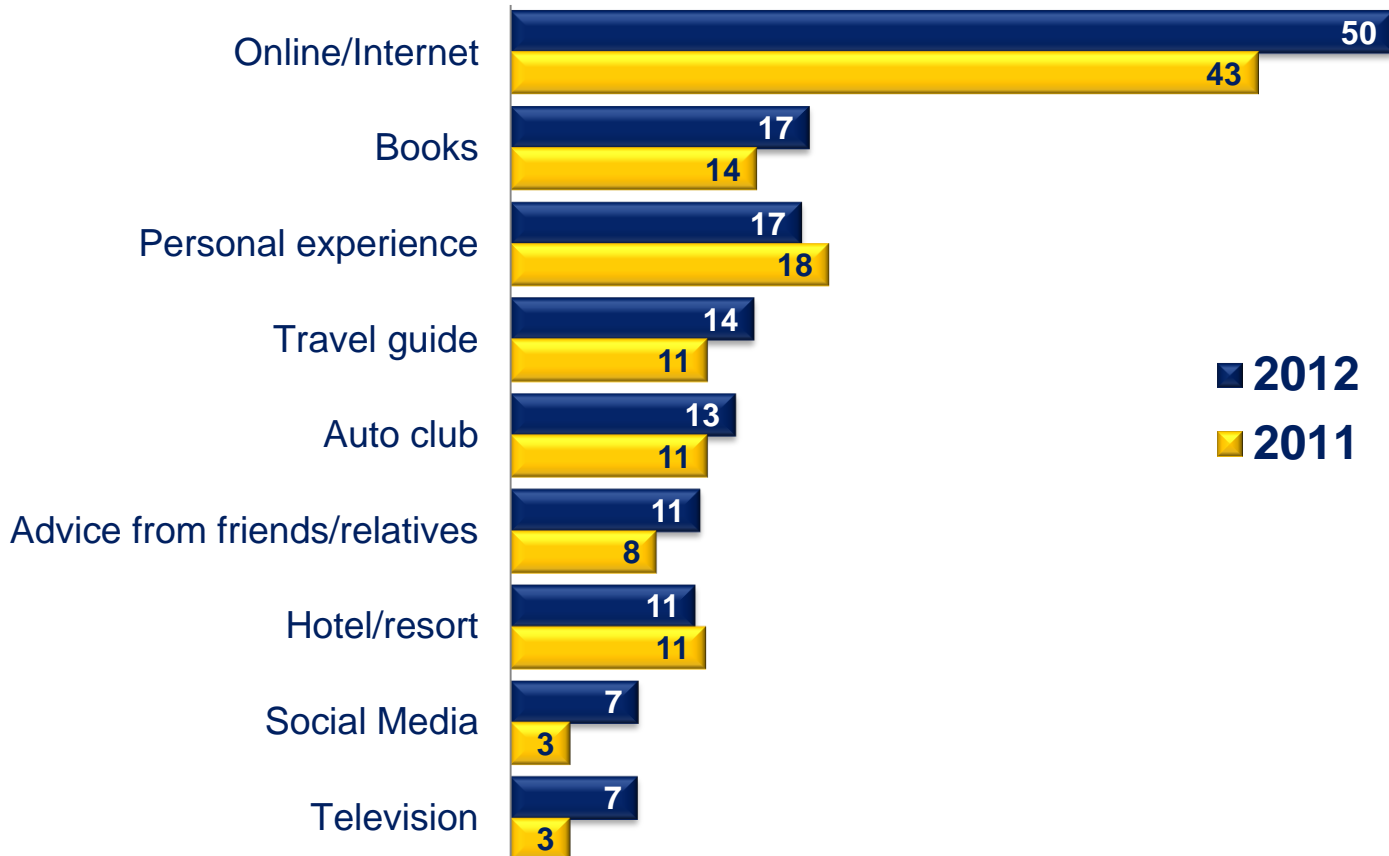
■ 2011 ■ 2012

# Information Sources Used for Planning the Trip



Base: Overnight Marketable Trips

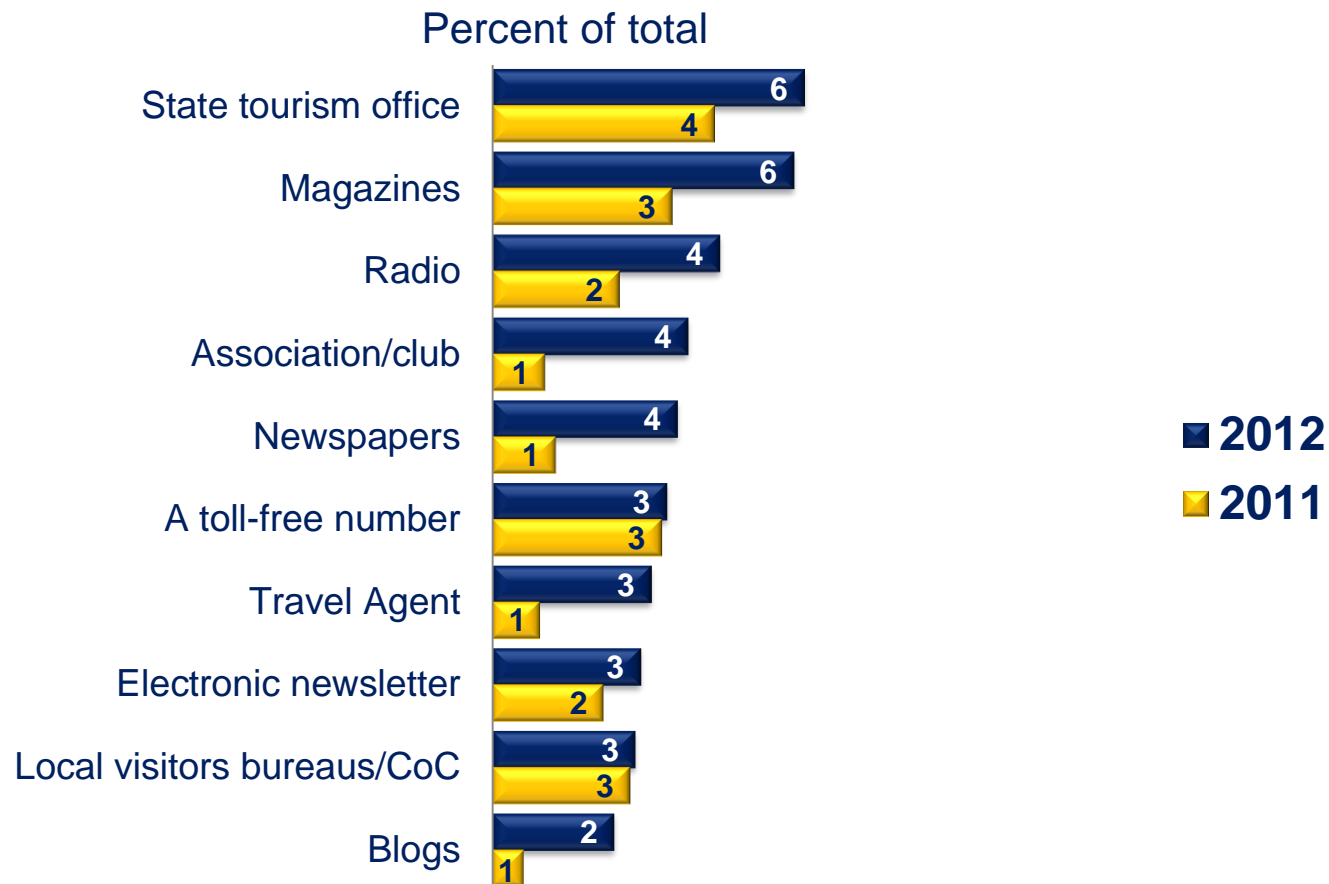
Percent of Total



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



Base: Overnight Marketable Trips

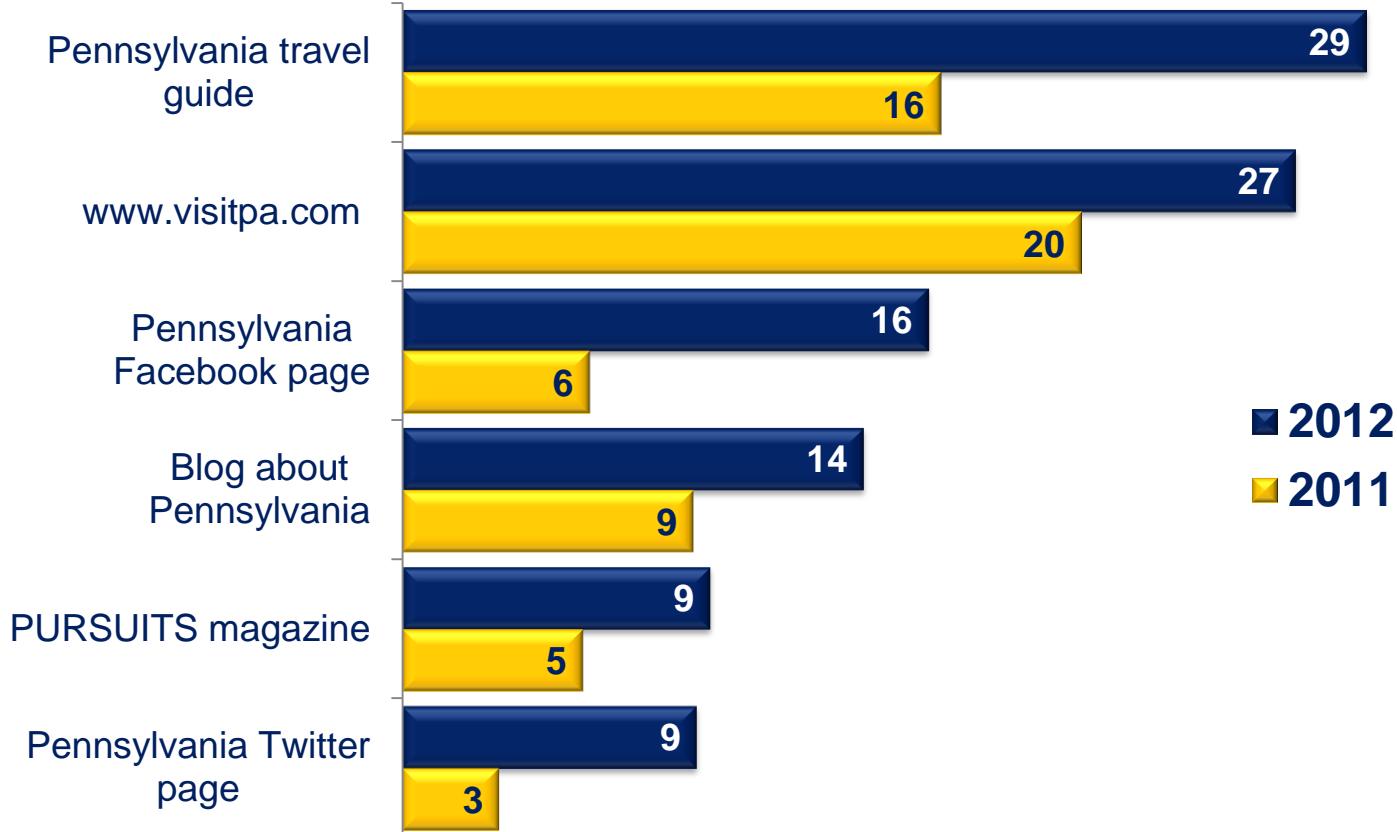


# Use of Pennsylvania Tourism Office Trip Planning Tools



Base: Overnight Marketable Trips

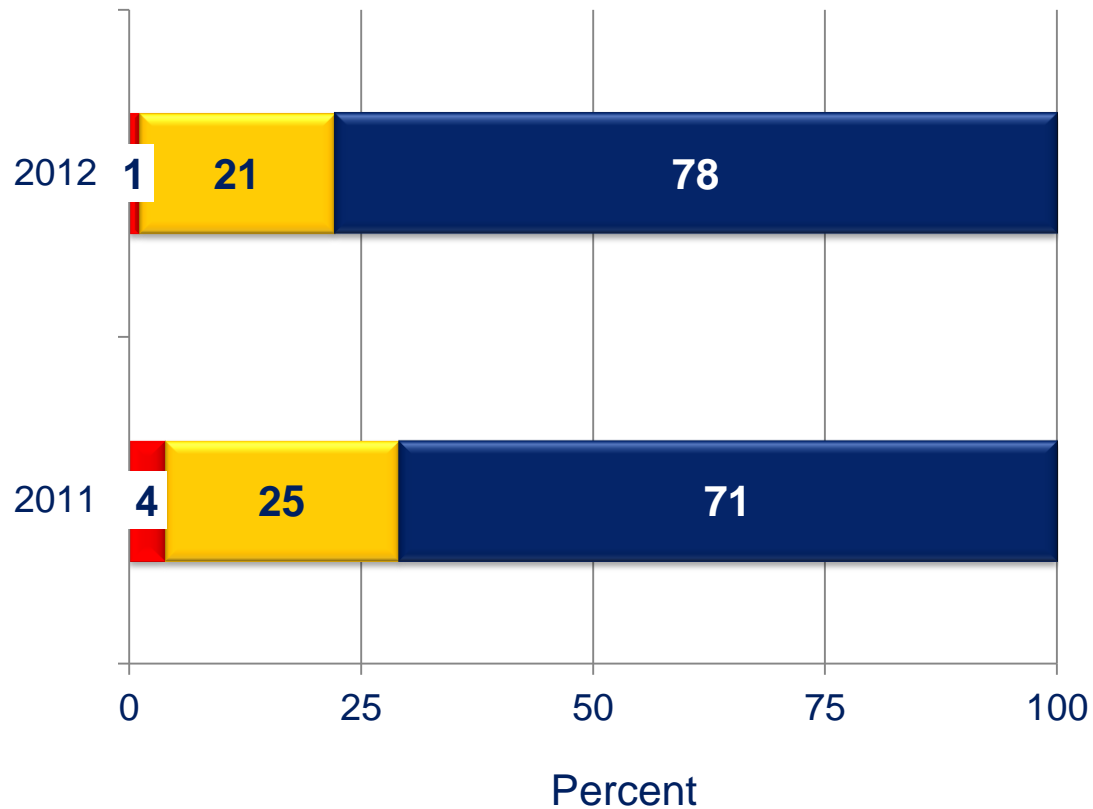
Percent of Total



# www.visitpa.com Usefulness



Base: Overnight Marketable Trips

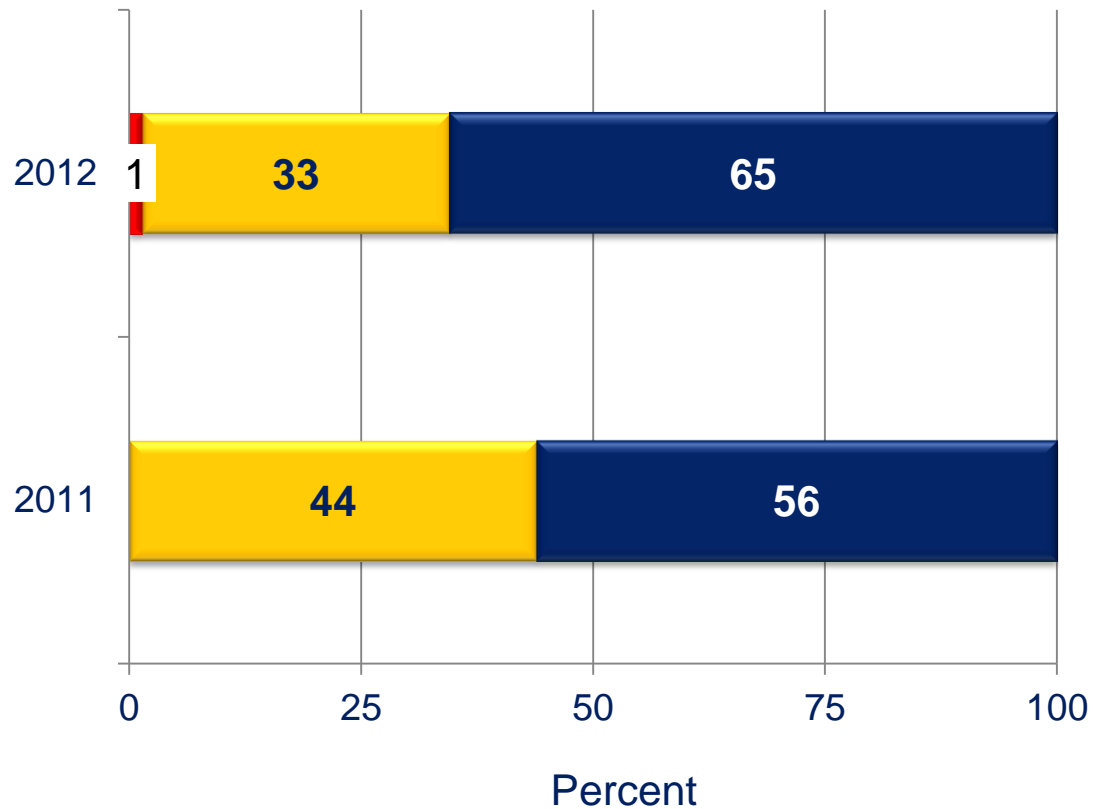


**3-Pt. Scale:** ■ Not Very Useful    ■ Somewhat Useful    ■ Very Useful

# Pennsylvania Travel Guide Usefulness



Base: Overnight Marketable Trips

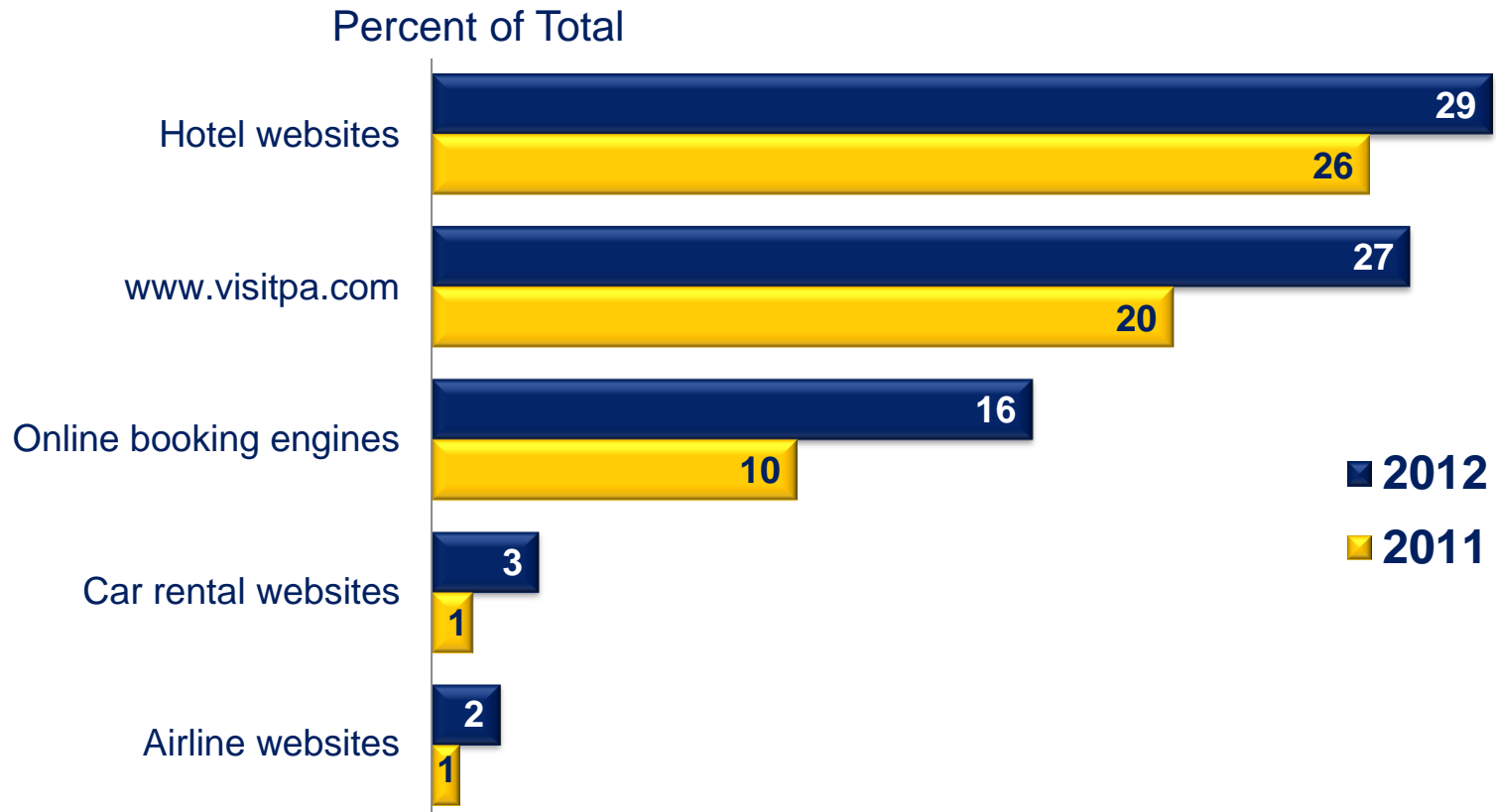


**3-Pt. Scale:** ■ Not Very Useful ■ Somewhat Useful ■ Very Useful

# Websites Used for Planning Pennsylvania Trip



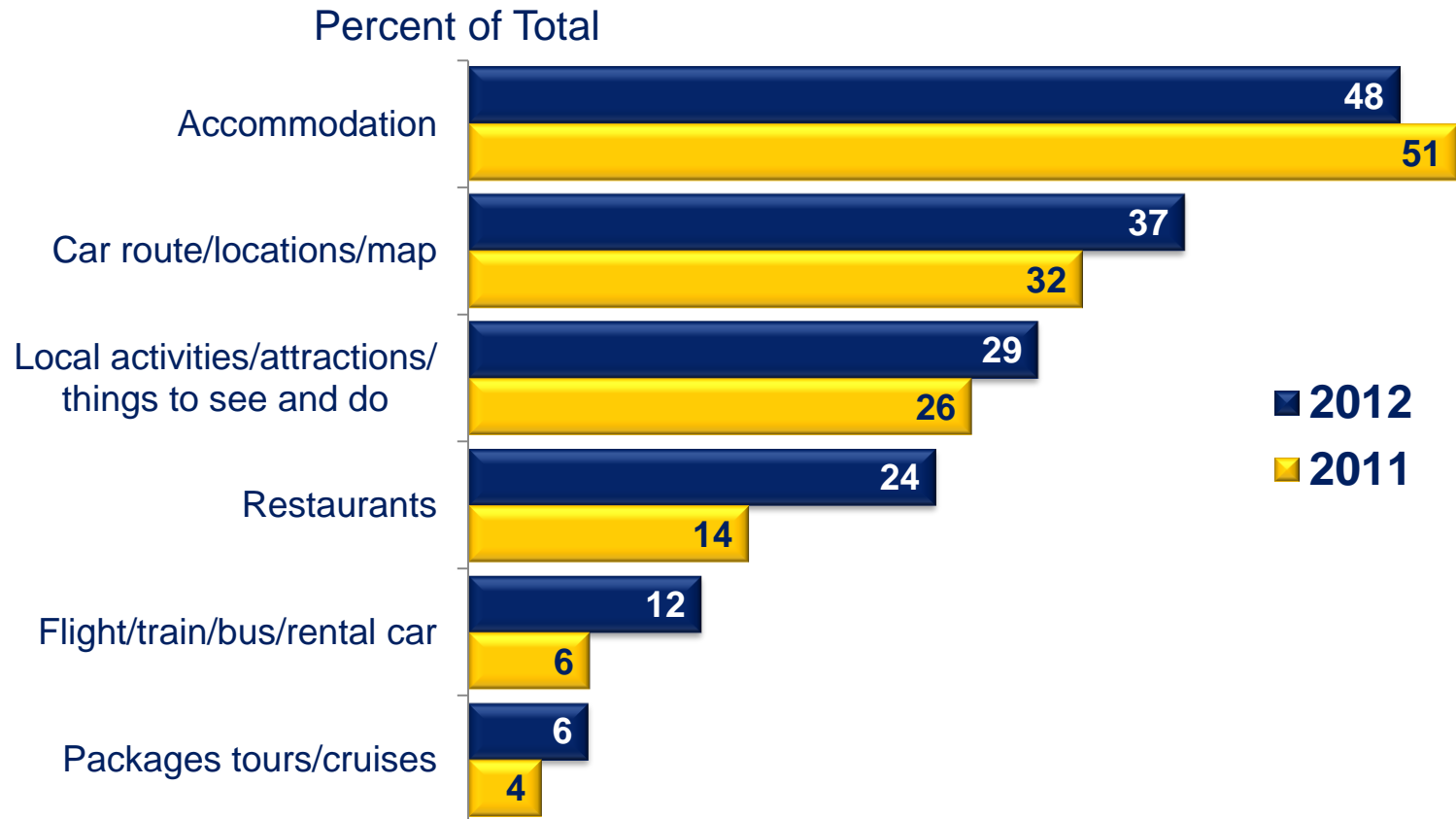
Base: Overnight Marketable Trips



# Trip Elements Planned Using Internet



Base: Overnight Marketable Trips

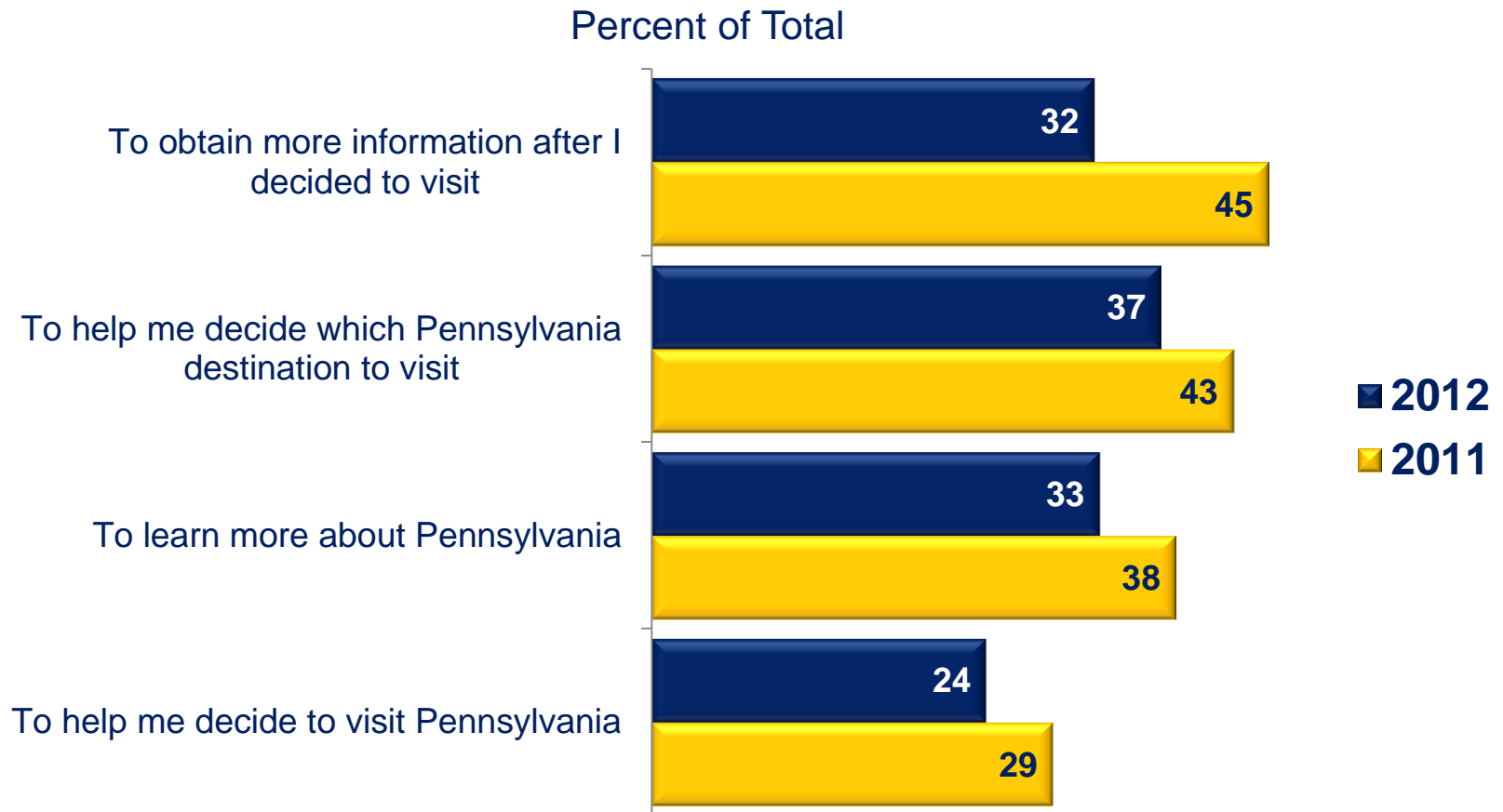




# Reasons for Visiting [www.visitpa.com](http://www.visitpa.com)



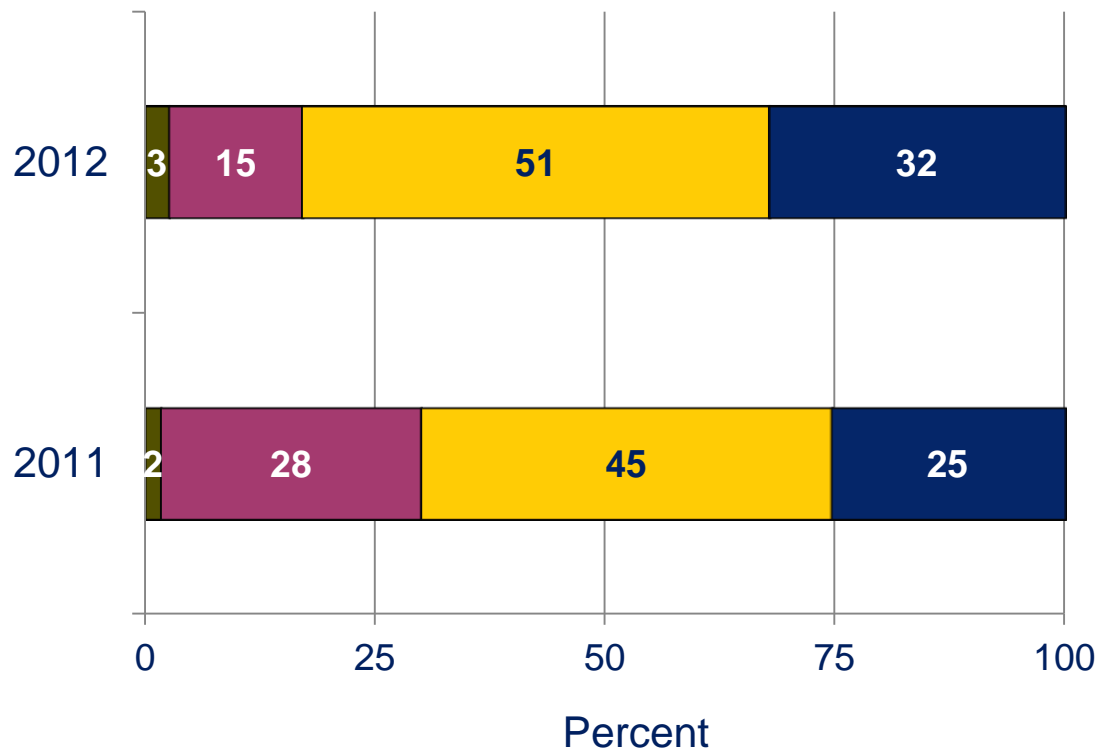
Base: Overnight Marketable Trips



# www.visitpa.com Influence on Planning



Base: Overnight Marketable Trips

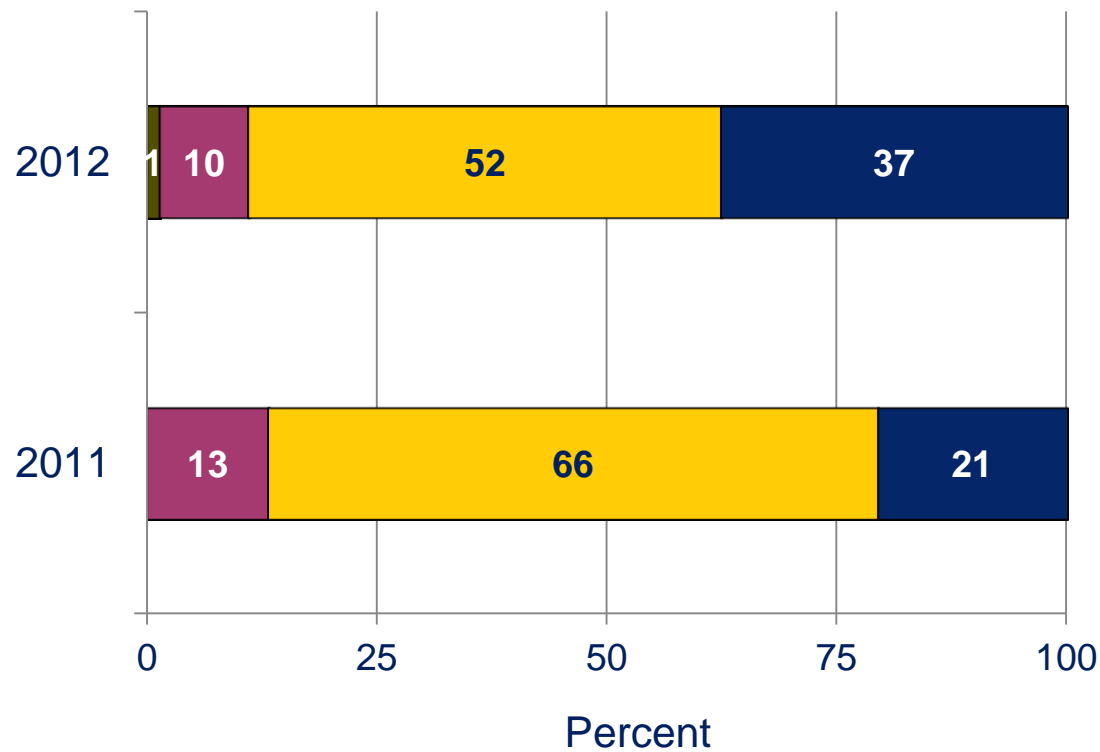


■ No Influence   ■ Very little Influence   ■ Some Influence   ■ Large Influence

# [www.visitpa.com](http://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

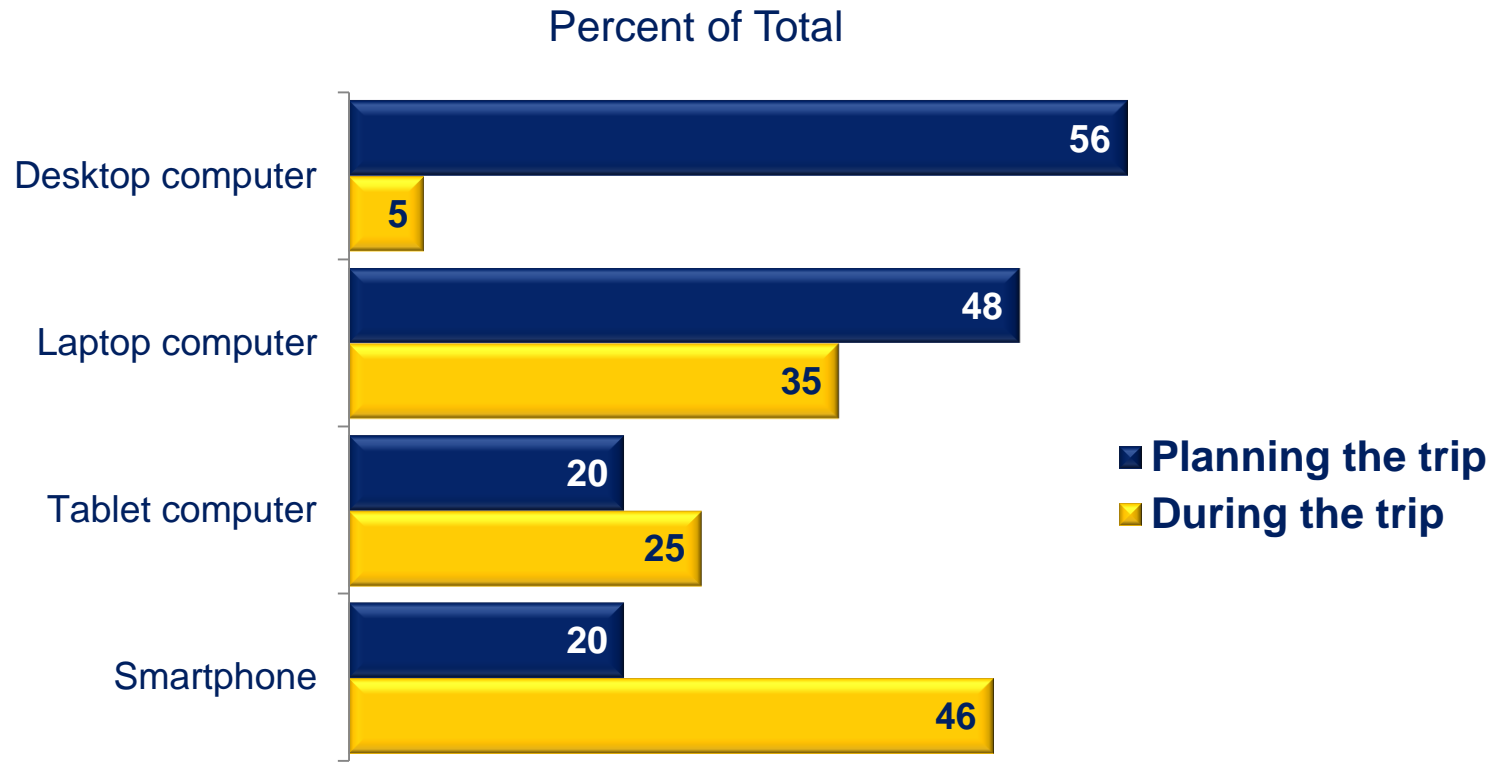
## Percent of Total



# Technology Used by Travelers



Base: Overnight Marketable Trips

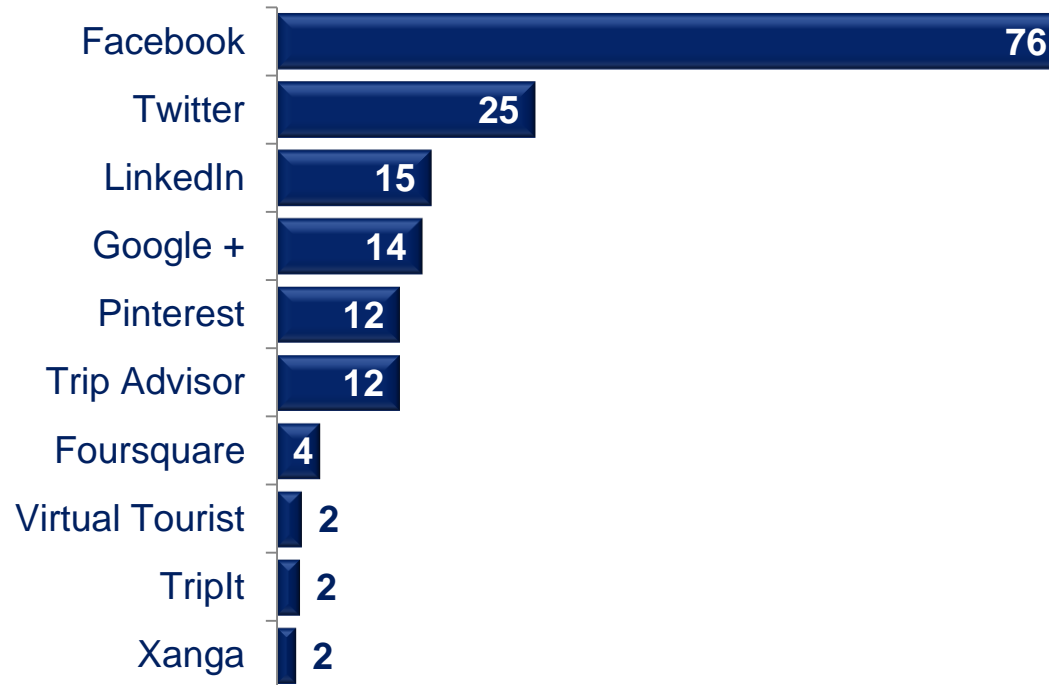


# Social Media Used by Travelers



Base: Overnight Marketable Trips

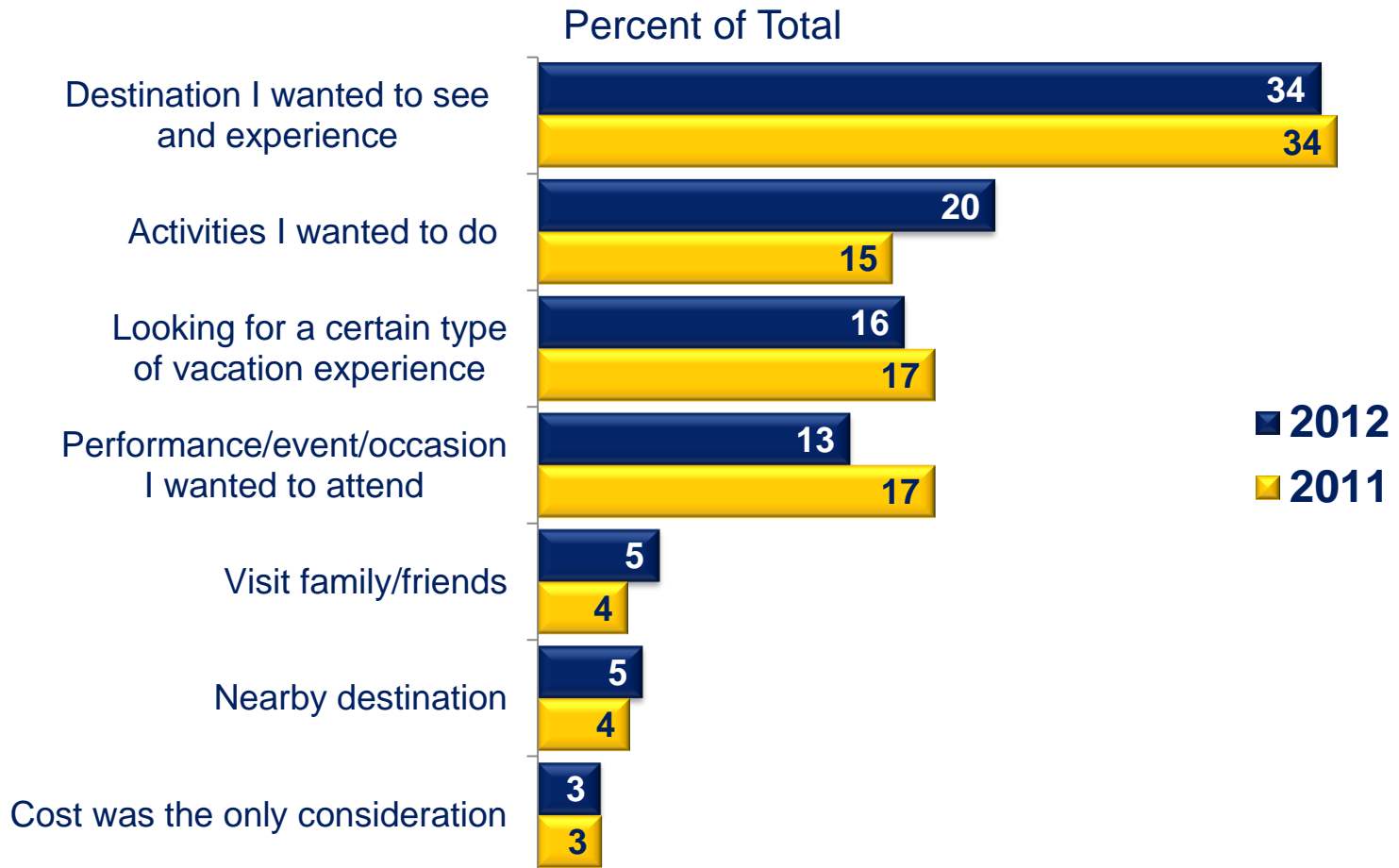
Percent of Total



# Planning Considerations Beyond Cost



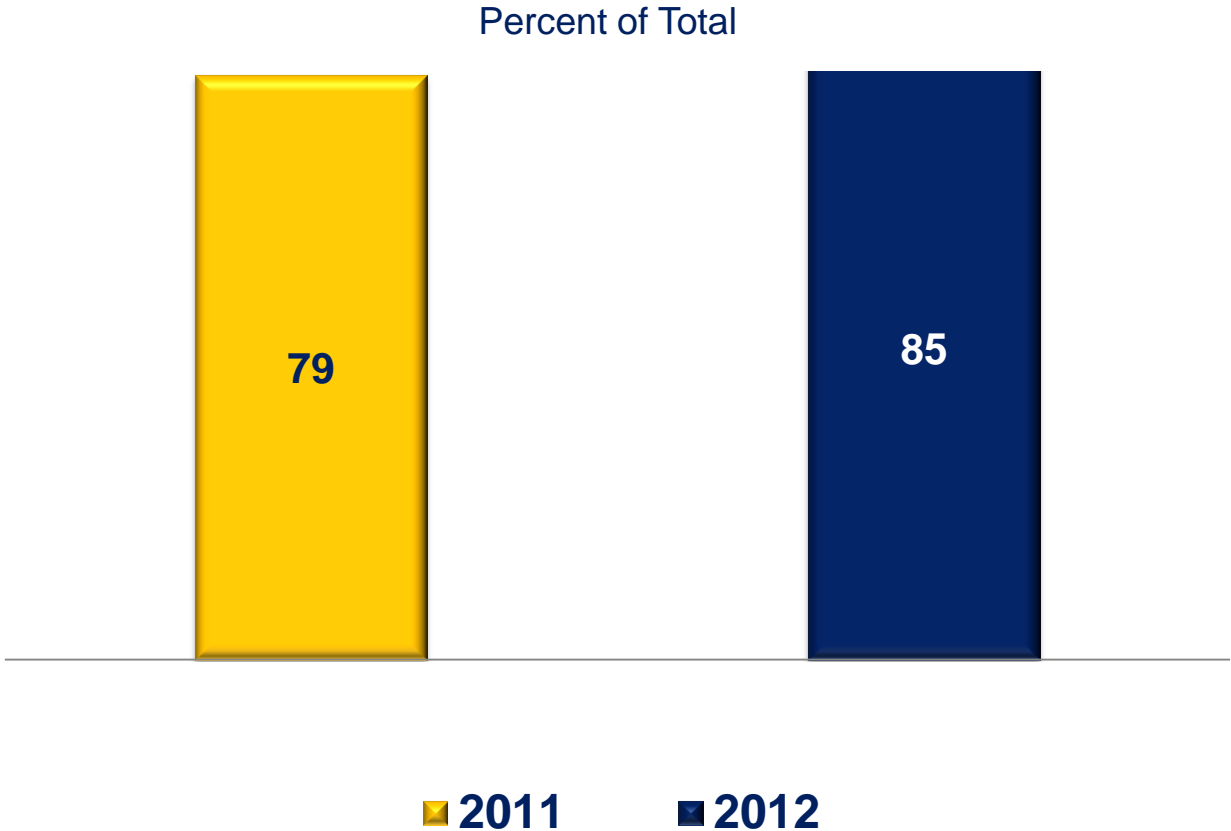
Base: Overnight Marketable Trips



# Percent of Travelers Booking In Advance



Base: Overnight Marketable Trips



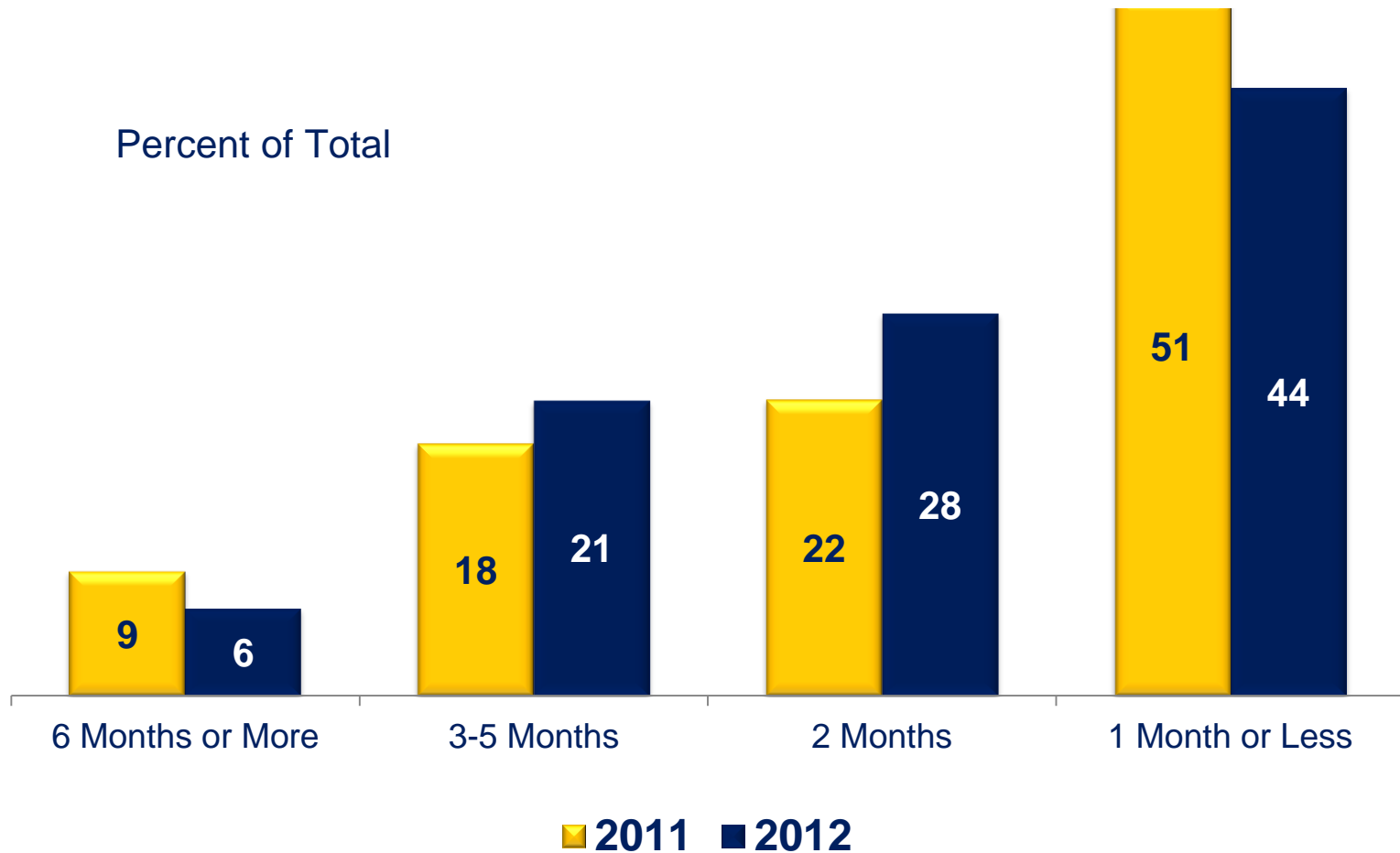


# Booking Cycle



Base: Overnight Marketable Trips

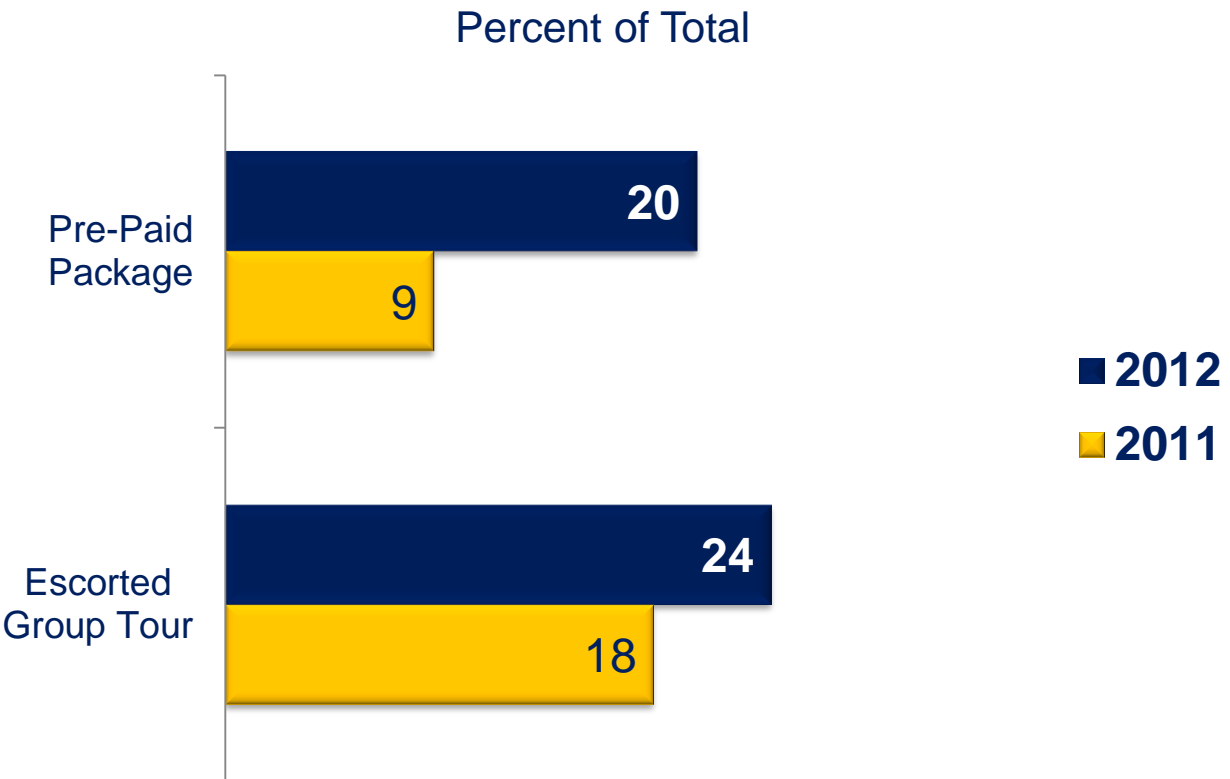
Percent of Total



# Use of Vacation Packages and Group Travel



Base: Overnight Marketable Trips



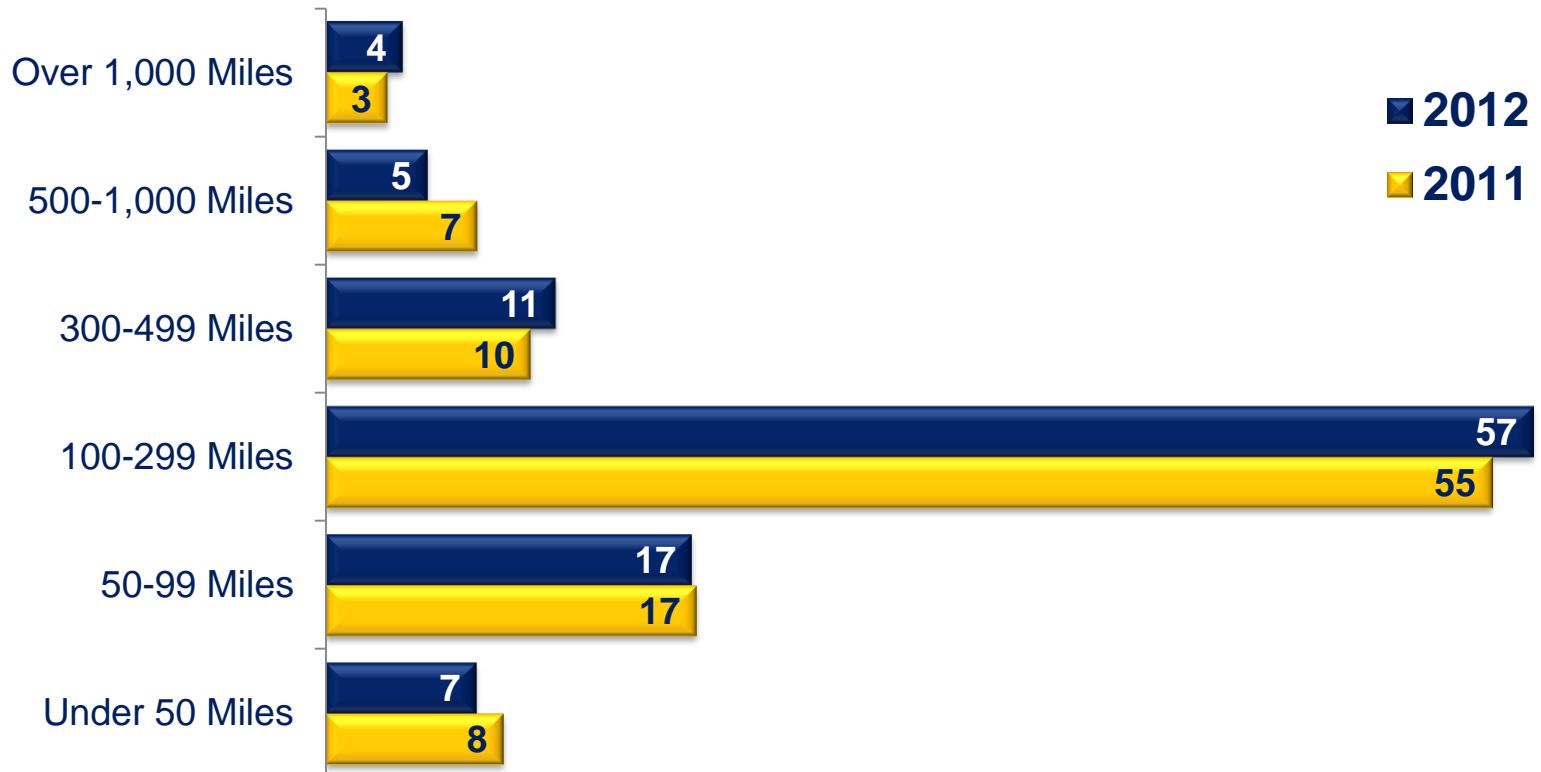
**Trip Characteristics of  
Pennsylvania's  
Marketable Overnight Travelers**

# Distance Traveled to Pennsylvania



Base: Overnight Marketable Trips

Percent of Total

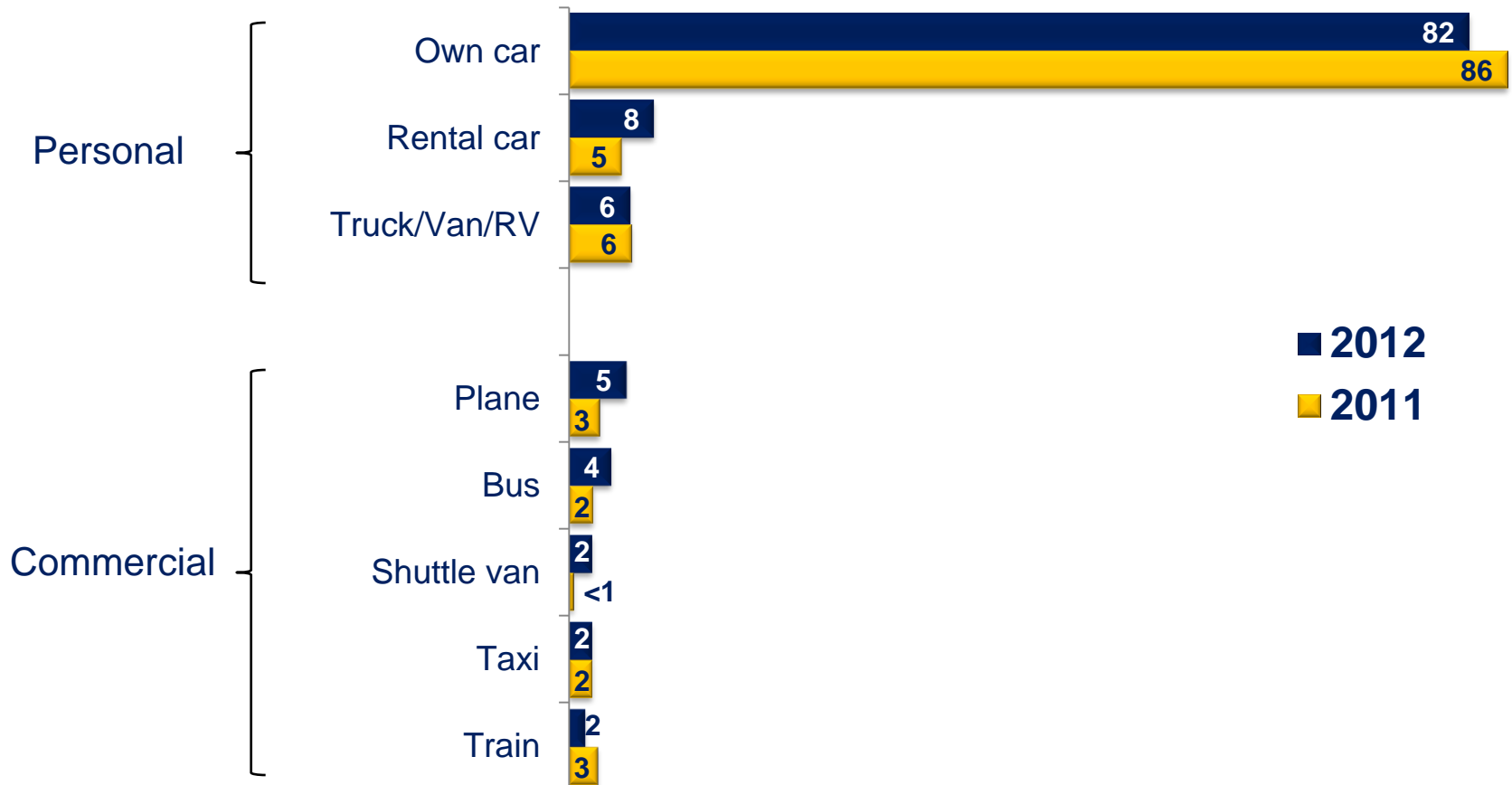


# Transportation Used to Enter Pennsylvania



Base: Overnight Marketable Trips Starting Outside Pennsylvania

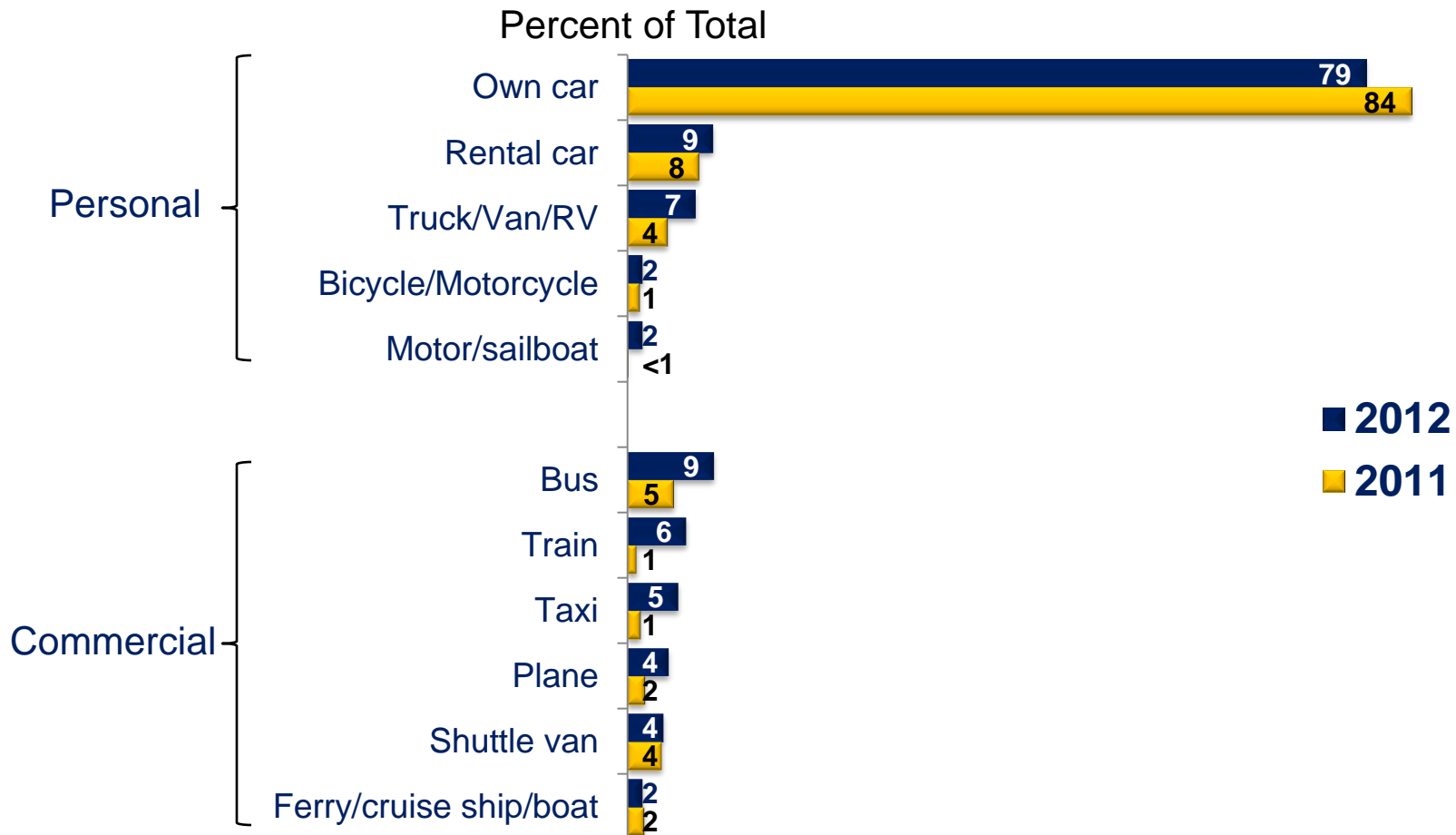
Percent of Total



# Transportation Used Inside Pennsylvania



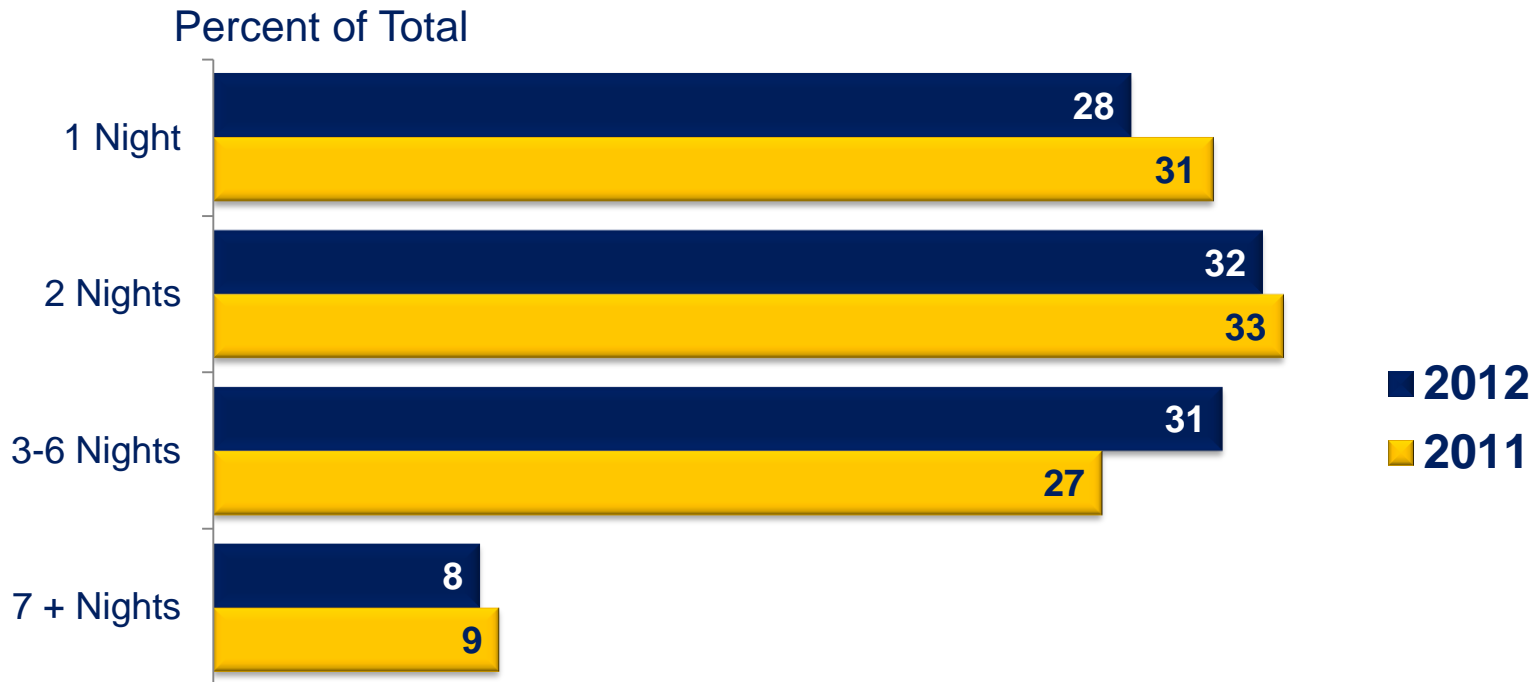
Base: Overnight Marketable Trips



# Total Nights Away



Base: Overnight Marketable Trips

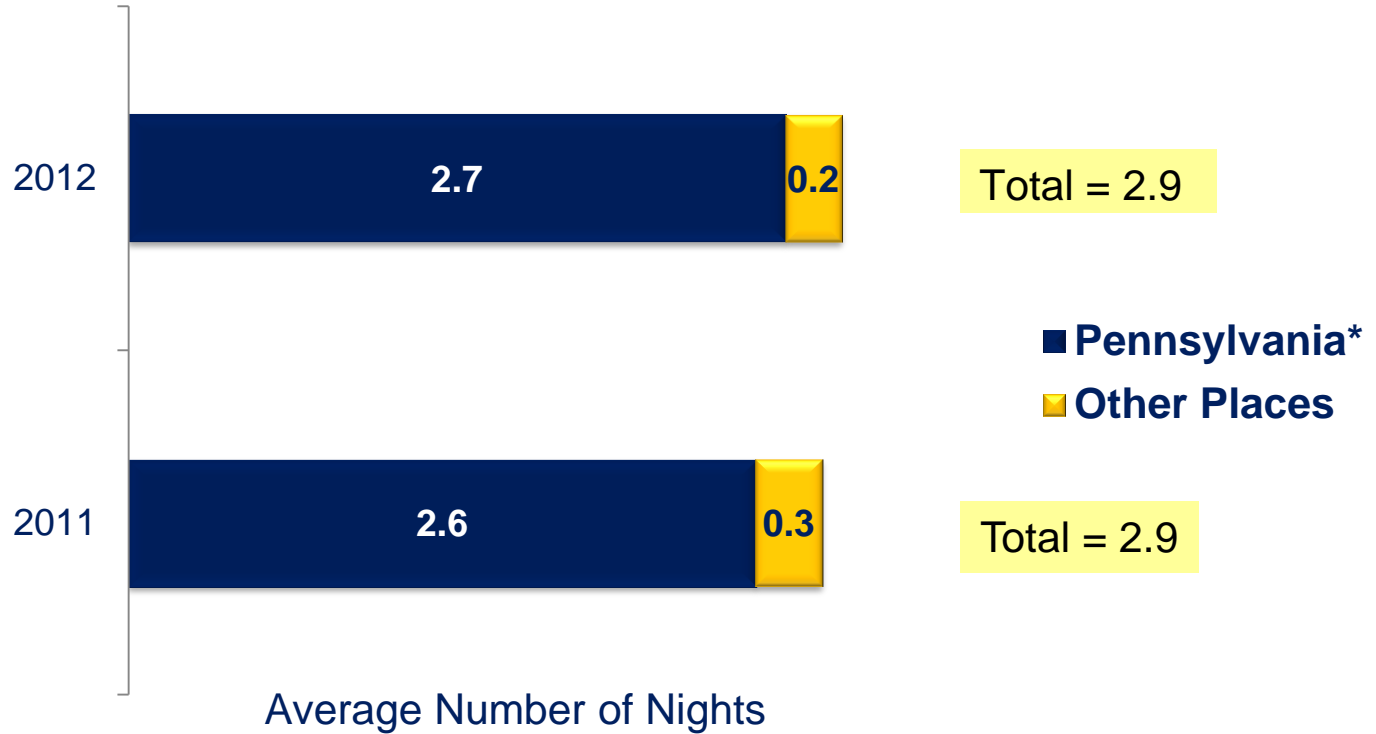


Average Number of Nights	2012	2011
	3.1	3.1

# Length of Stay



Base: Overnight Marketable Trips



\* Those who spent 1 or more nights anywhere in Pennsylvania

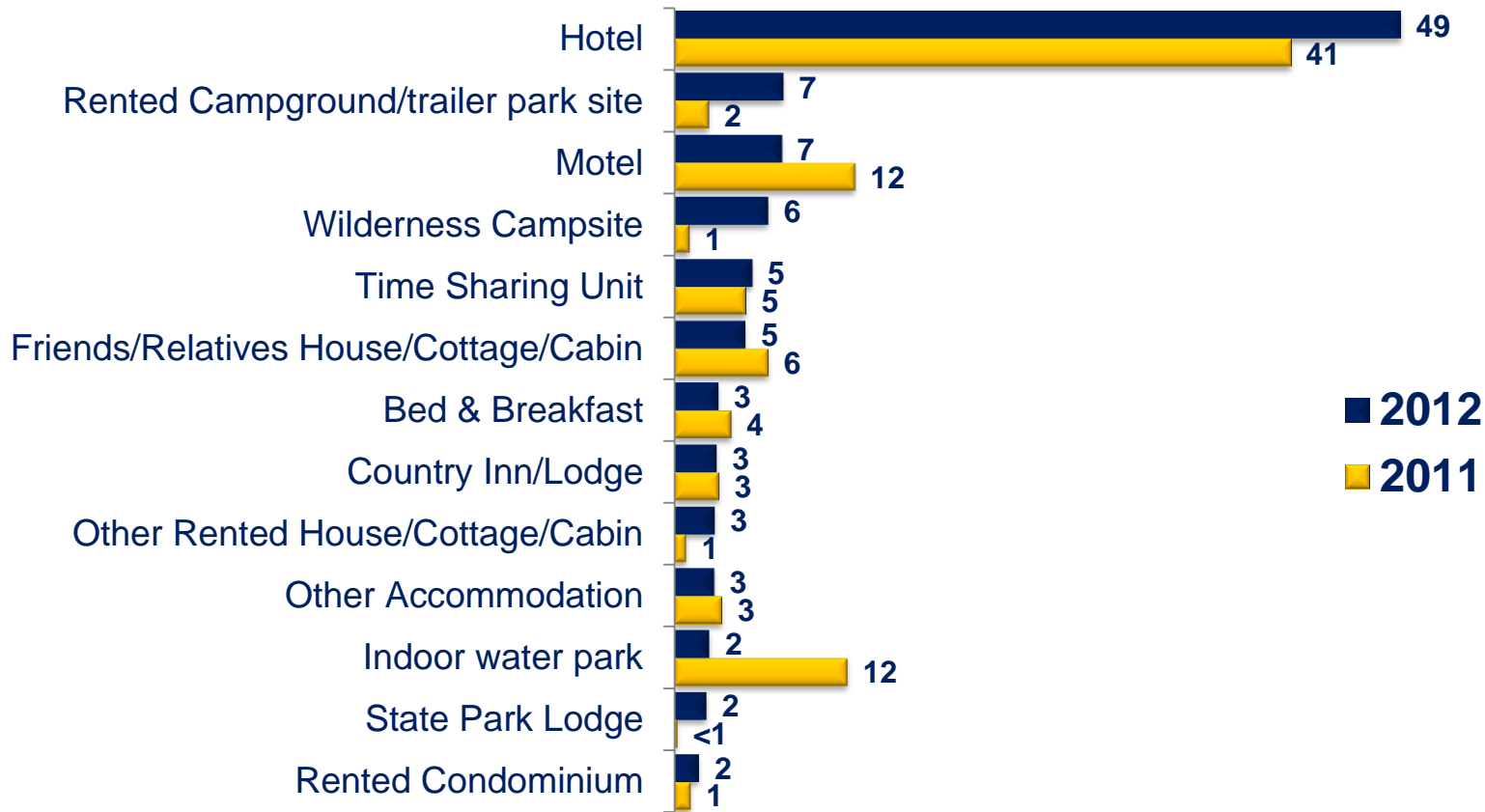


# Accommodations\*



Base: Overnight Marketable Trips

## Percent of Total

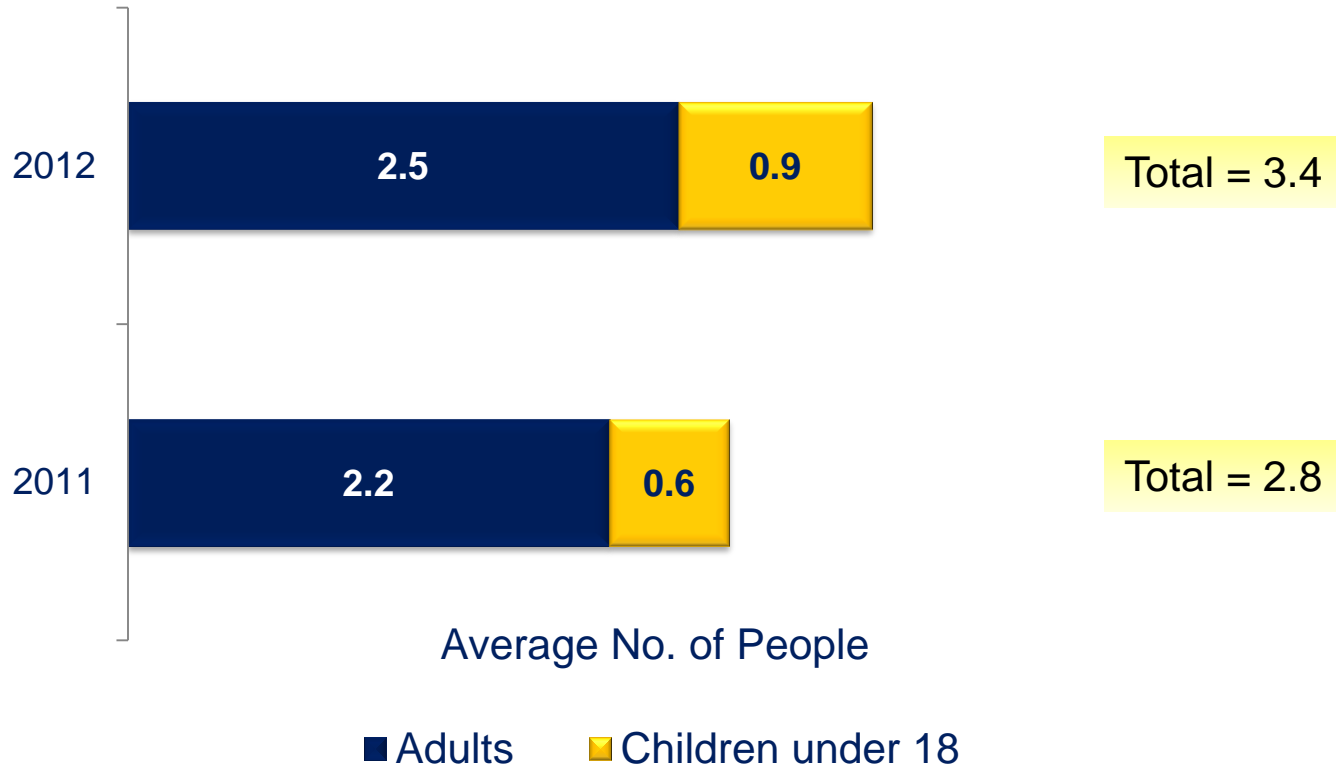


\* Percent of trip nights spent in each type of accommodation

# Size of Travel Party



Base: Overnight Marketable Trips

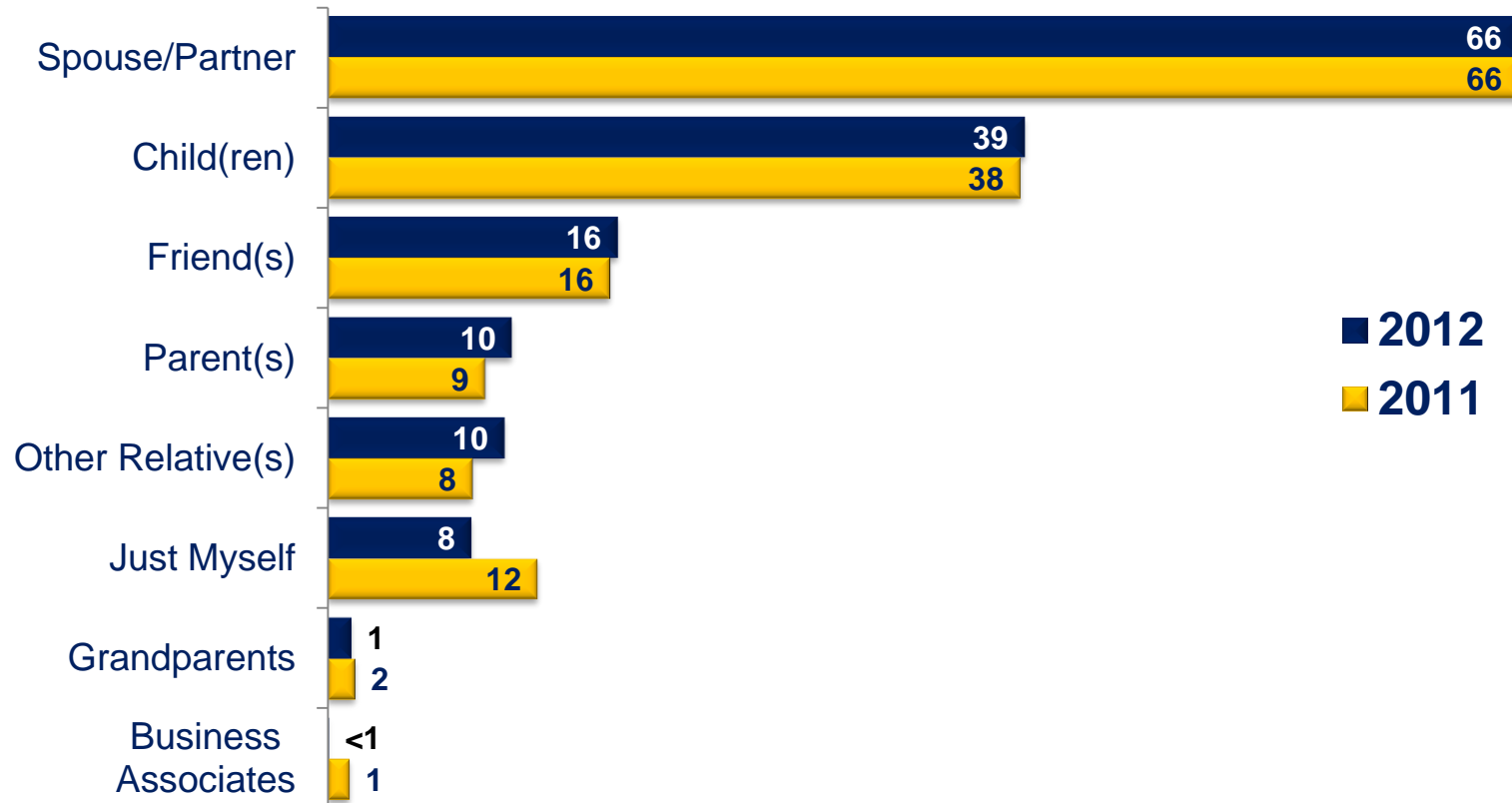


# Composition of Travel Party



Base: Overnight Marketable Trips

Percent of Total

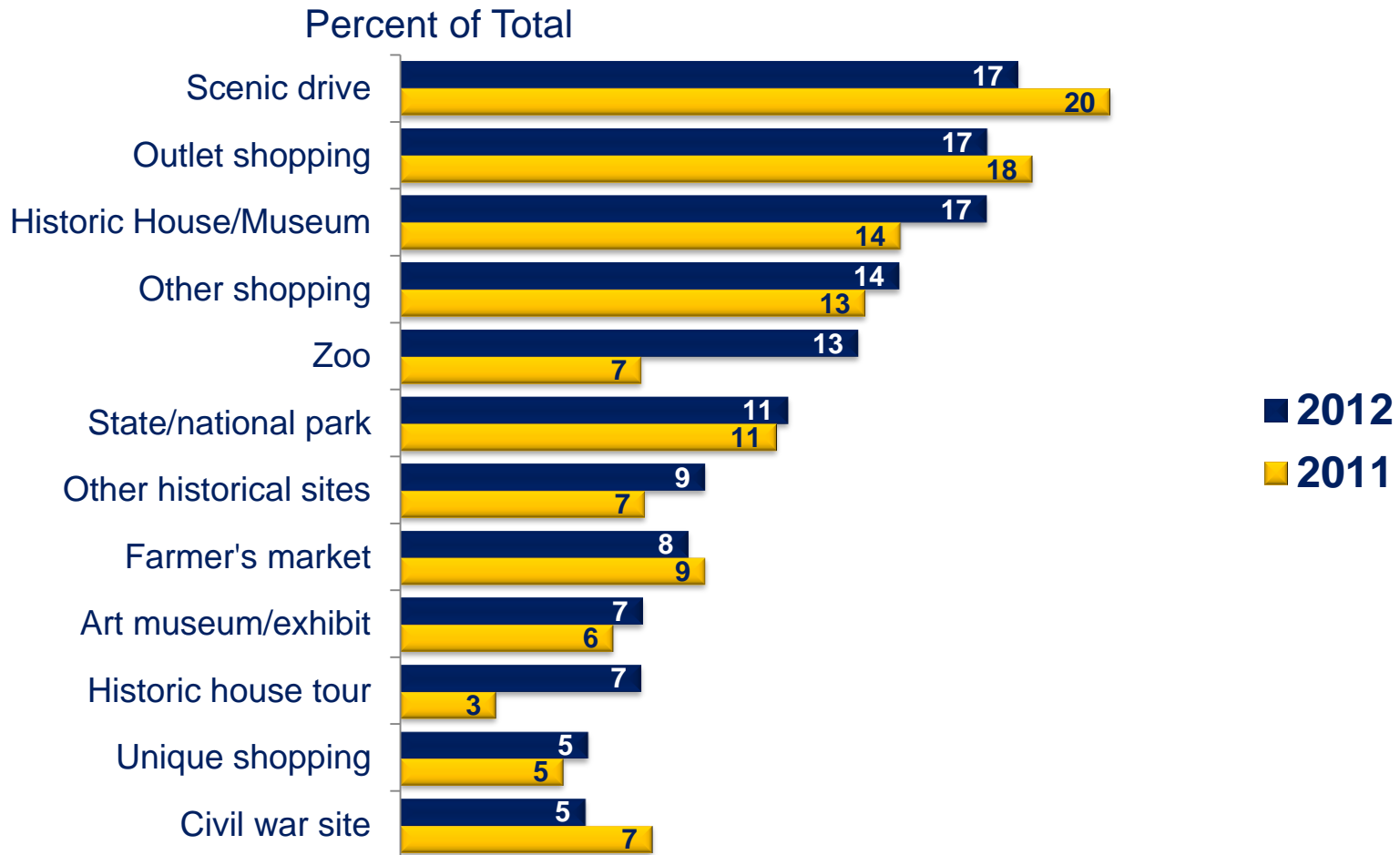


# **Trip Experiences — Overnight Marketable Trips**

# Things Seen and Experienced on Trip



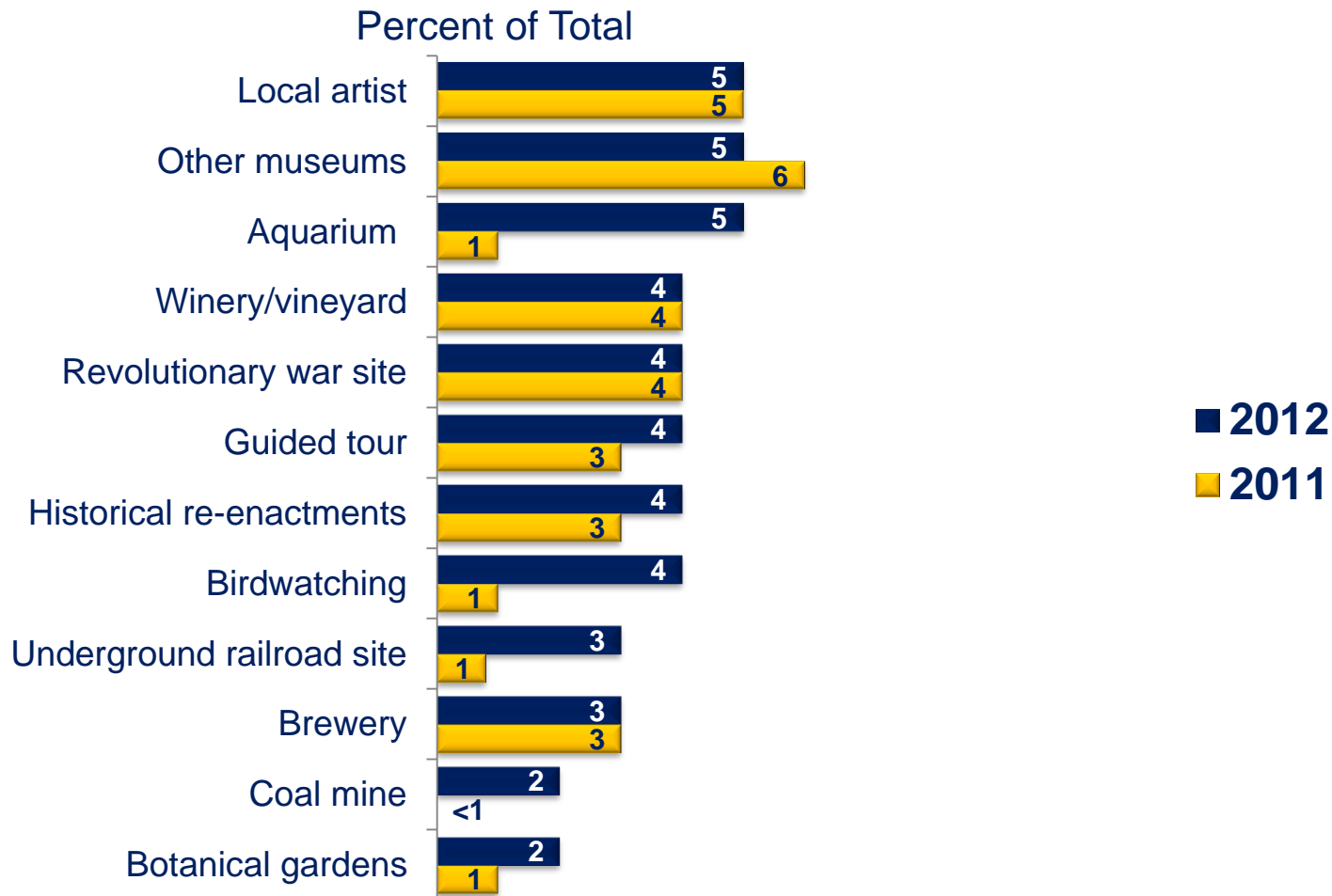
Base: Overnight Marketable Trips



# Things Seen and Experienced on Trip (cont'd)



Base: Overnight Marketable Trips

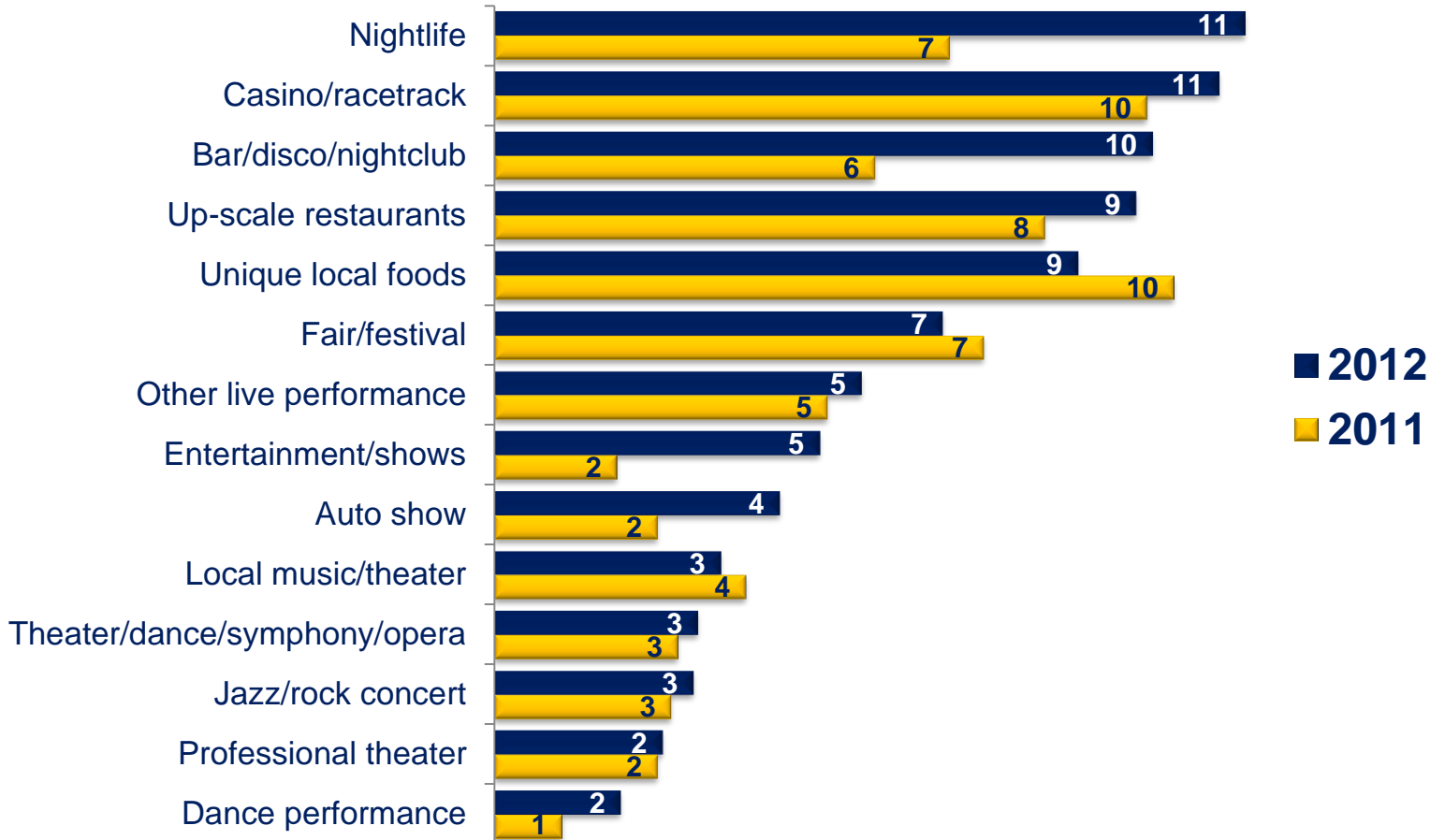


# Dining/Entertainment



Base: Overnight Marketable Trips

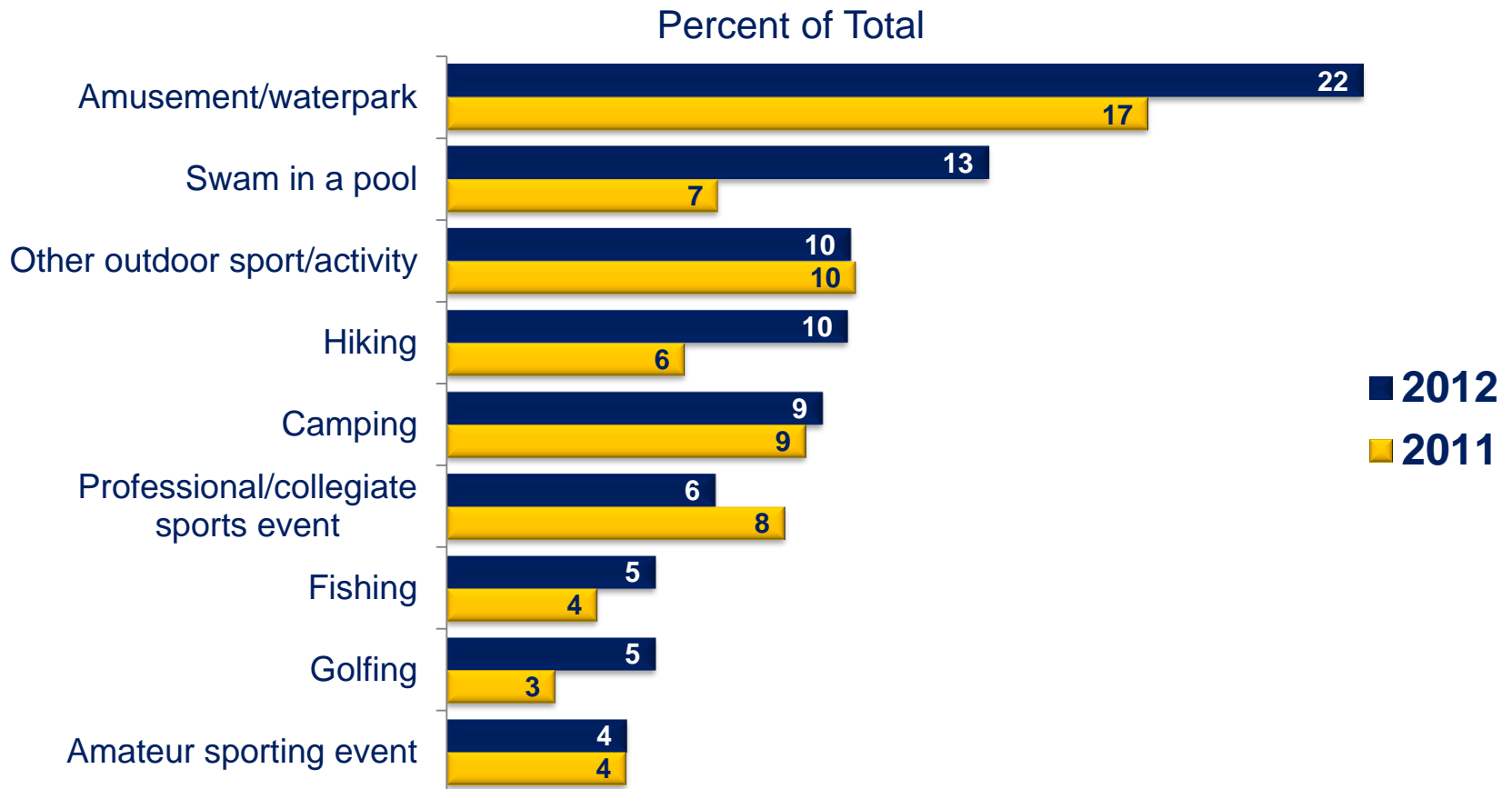
## Percent of Total



# Sports and Recreation



Base: Overnight Marketable Trips



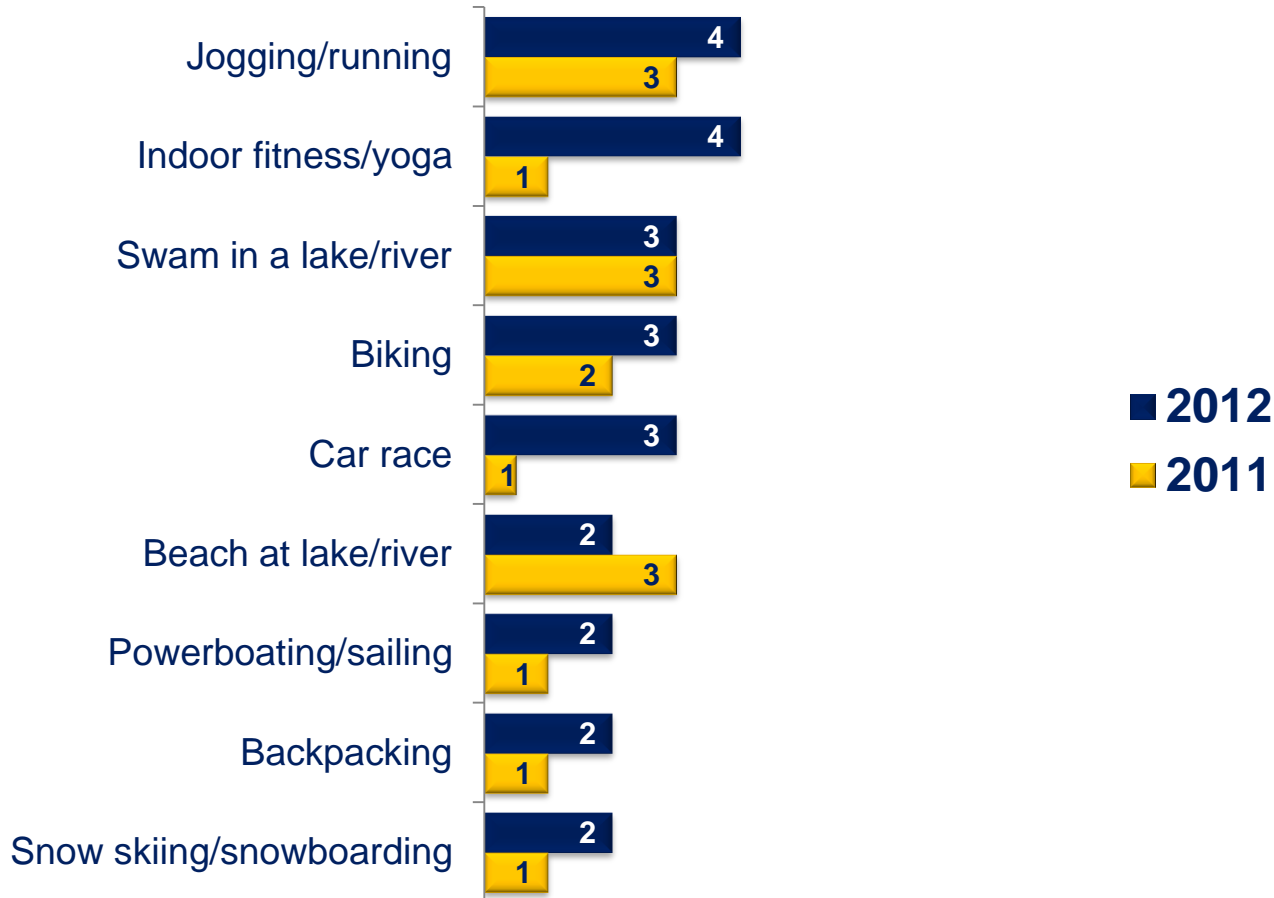


# Sports and Recreation (cont'd)



Base: Overnight Marketable Trips

## Percent of Total



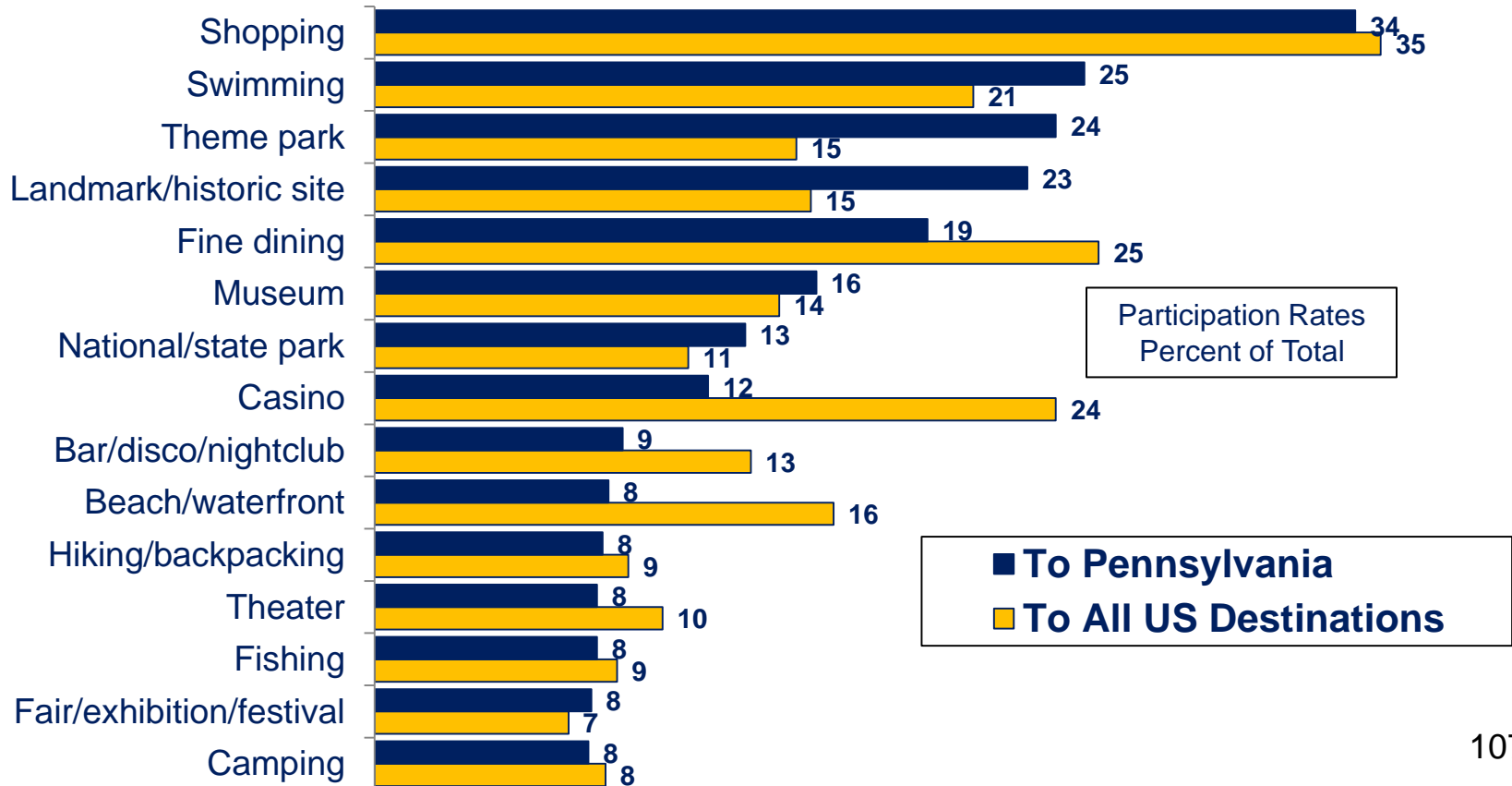
# **Activities by Origin Market of Marketable Overnight Travelers**

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



Base: Overnight Marketable Trips

*Pennsylvania has a distinct advantage over other US destinations in attracting NY travelers who are interested in theme parks, historic sites, and to a lesser extent, museums.*

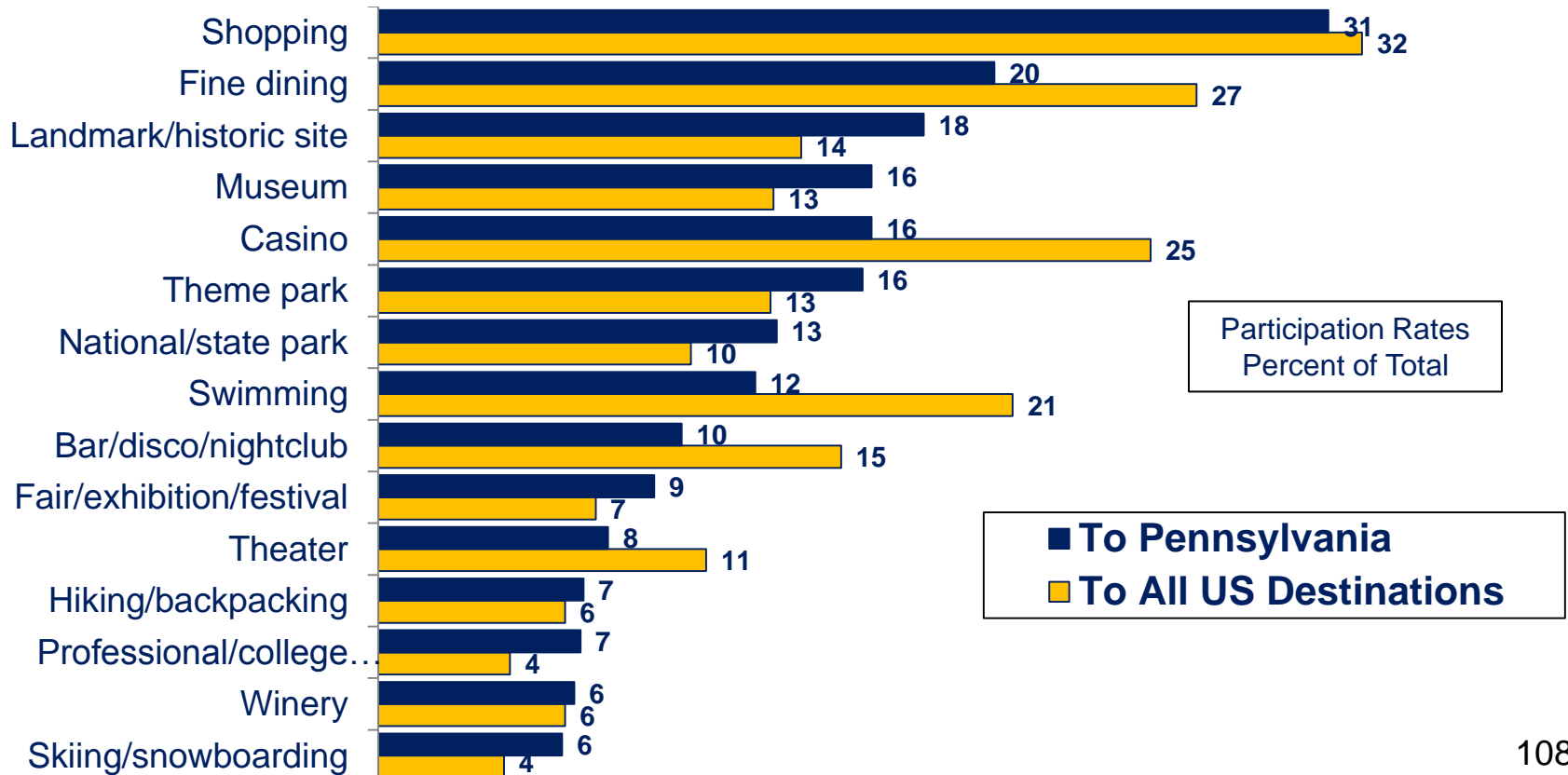


# Main Activities of Travelers from New Jersey on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

*Pennsylvania has an advantage over other US destinations in attracting NJ travelers who are interested in historic sites, museums, theme parks, and national/state parks.*

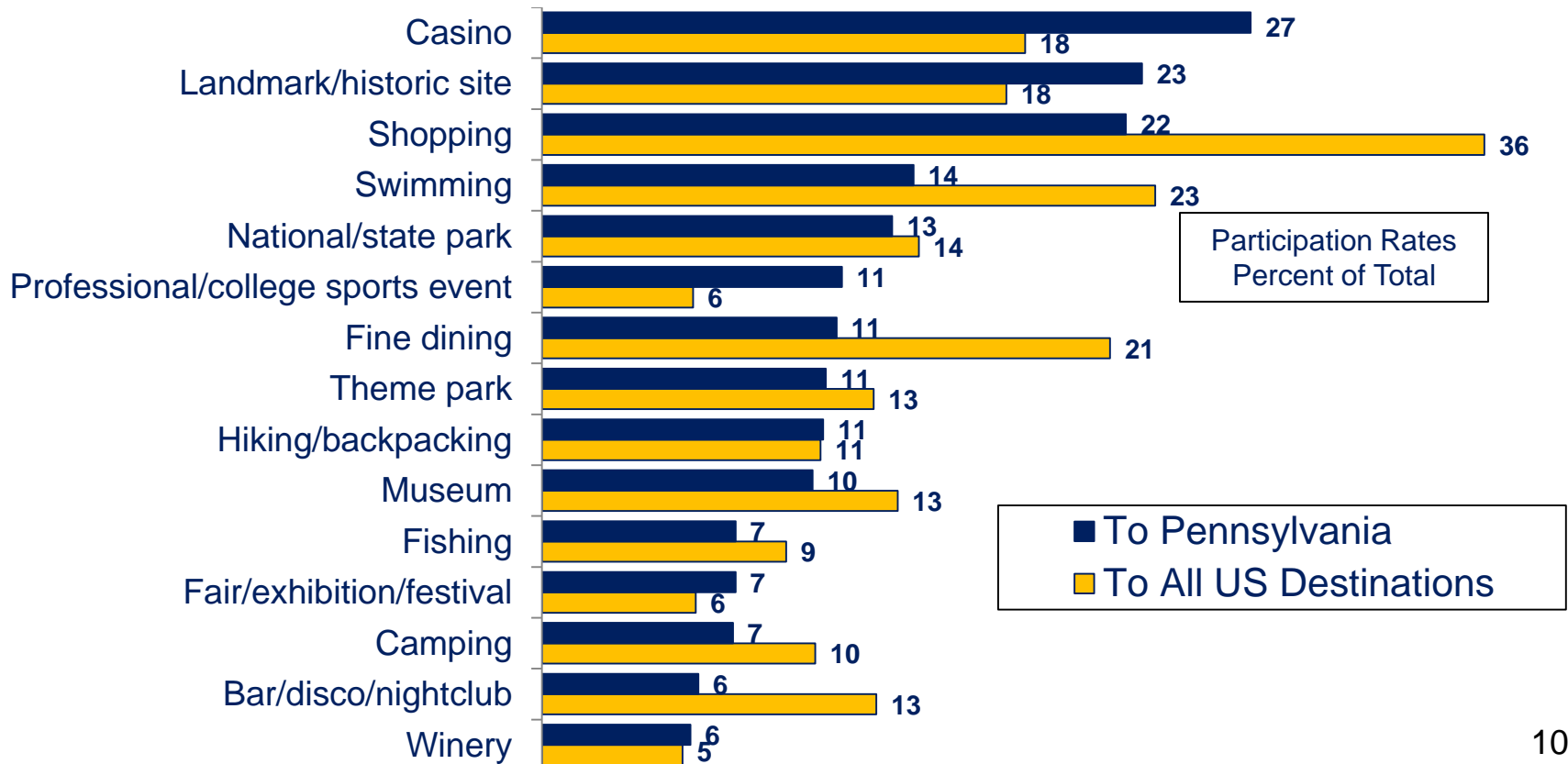


# Main Activities of Travelers from Ohio on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

*Pennsylvania has an advantage over other US destinations in attracting OH travelers who are interested in casinos, sports events, historic sites, and fair/exhibition/festivals.*

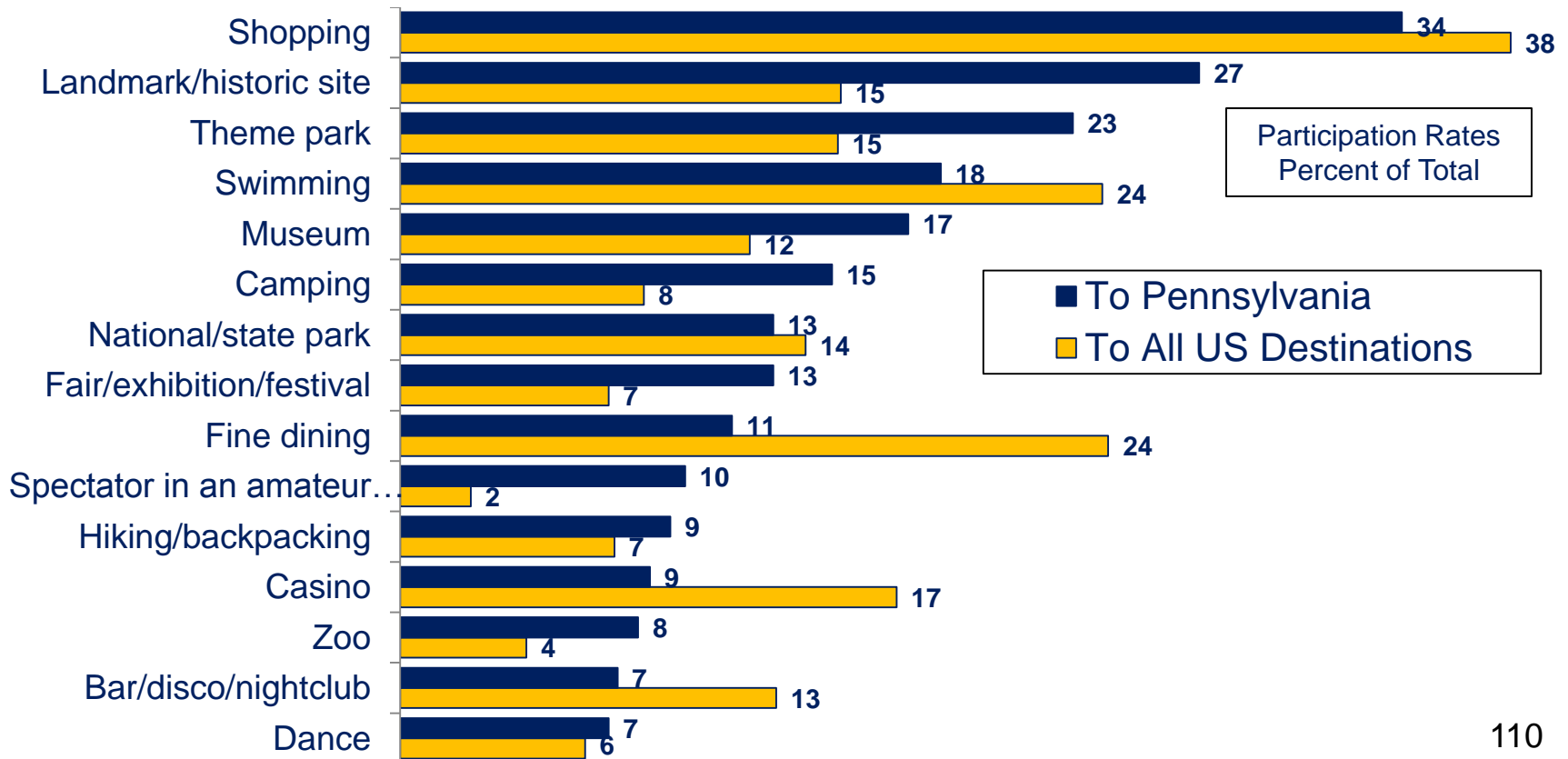


# Main Activities of Travelers from Maryland on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

*Pennsylvania has an advantage over other US destinations in attracting MD travelers who are interested in historic sites, theme parks, and sports events.*

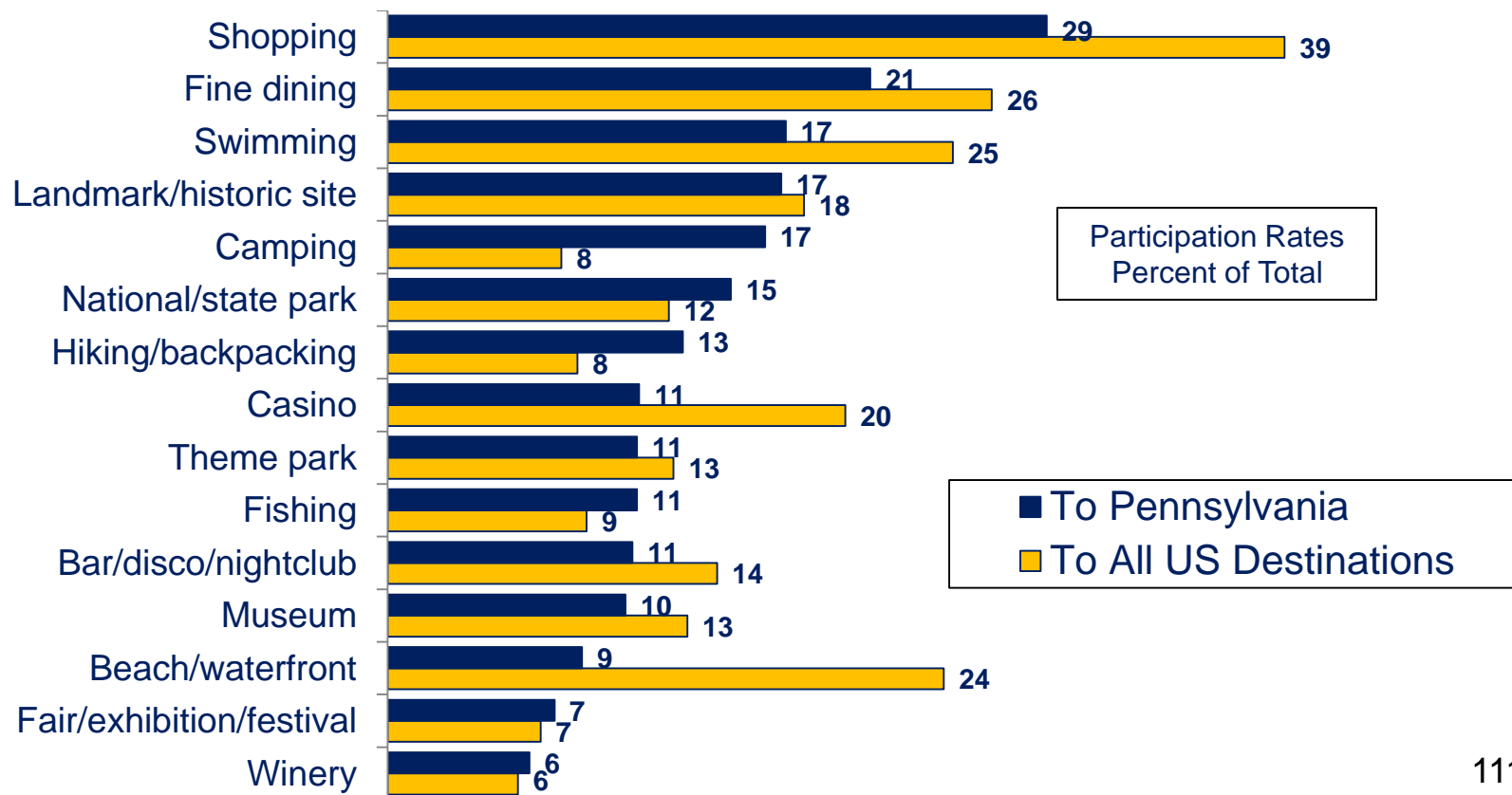


# Main Activities of Travelers from Pennsylvania on Marketable Overnight Trips to Pennsylvania vs to All US Destinations



Base: Overnight Marketable Trips

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

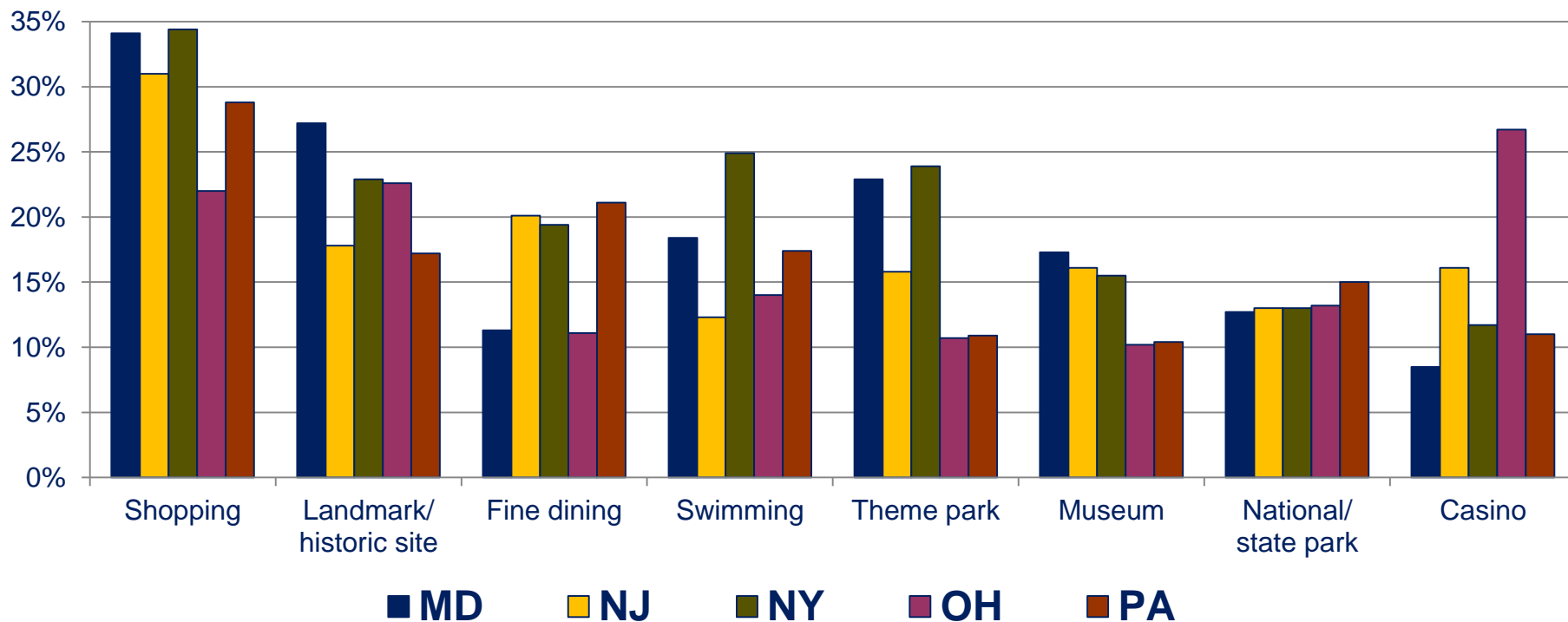


# Comparison of Participation Rates for Main Activities of Marketable Overnight Travelers from PA's Top Markets



Base: Overnight Marketable Trips

Travelers from Ohio are far more likely to visit a PA casino compared to travelers from other states, while travelers from New York and Maryland clearly prefer visiting PA's theme parks and swimming activities.





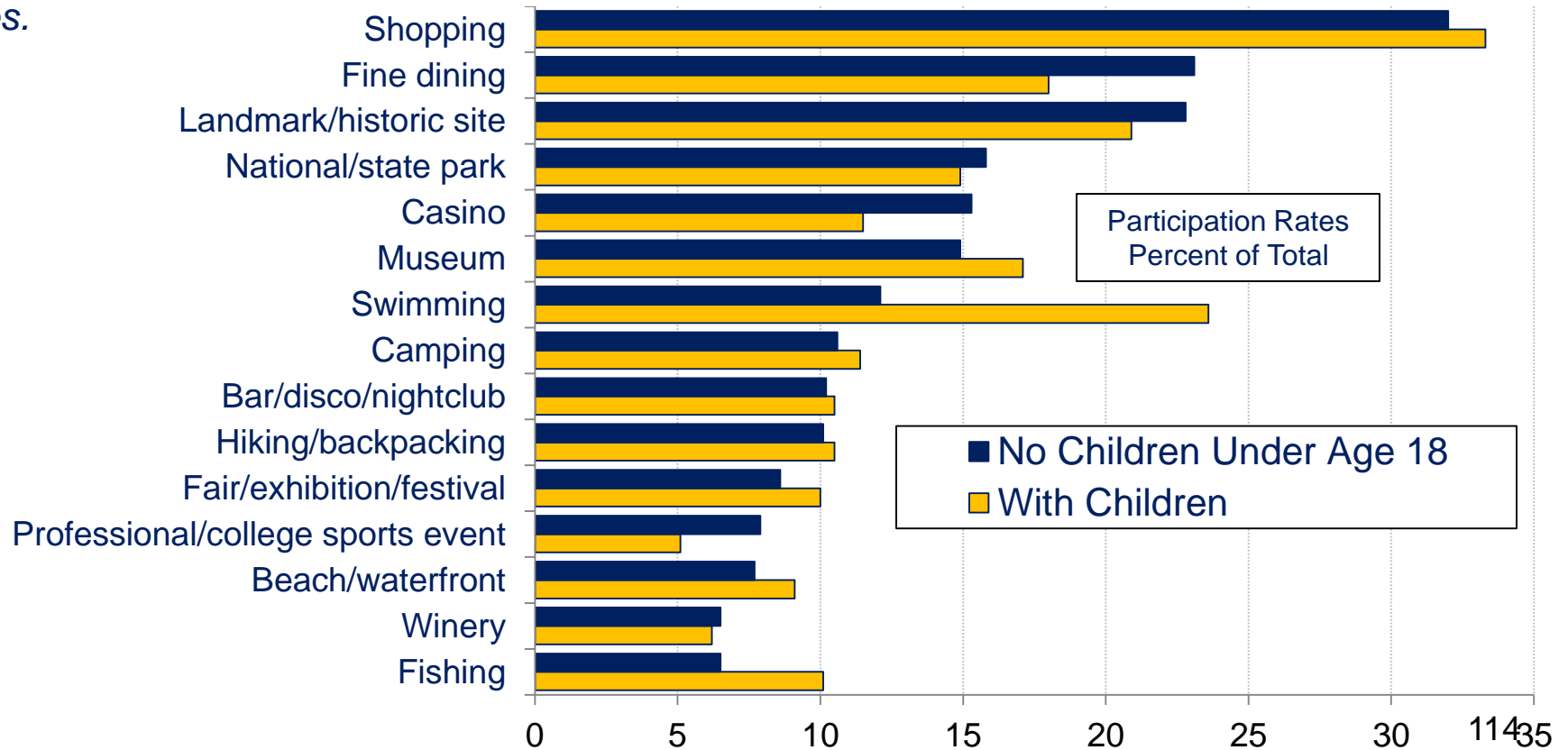
# **Activities by Presence/Absence of Children in Travelers' Households**

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



Base: Overnight Marketable Trips

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



**Regional Attractions Visited  
2012 Marketable Overnight Trips**

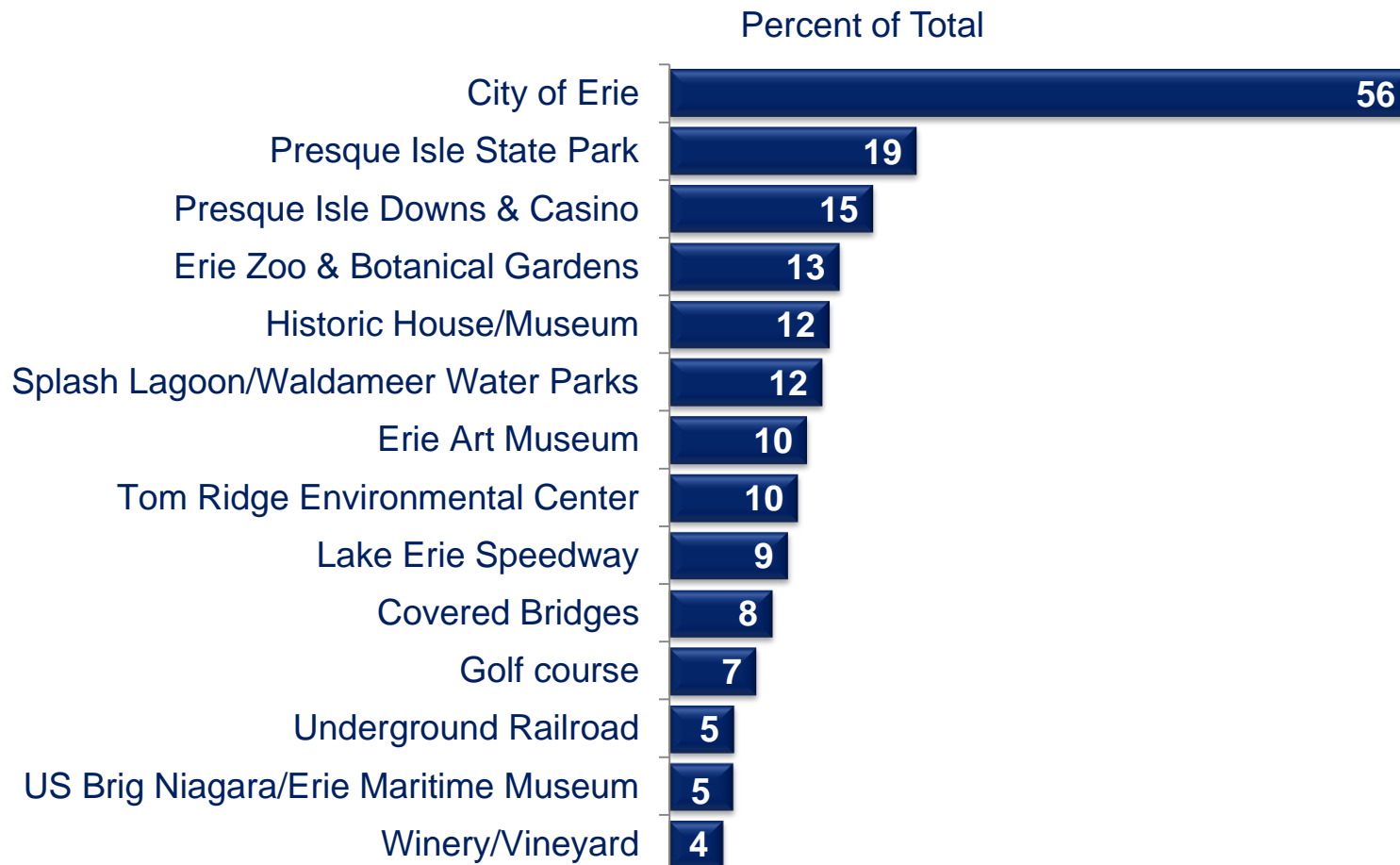
# Pennsylvania Regional Map



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



Base: Overnight Trips



\*Erie Region

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



Base: Overnight Trips



# Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region\*



Base: Overnight Marketable Trips

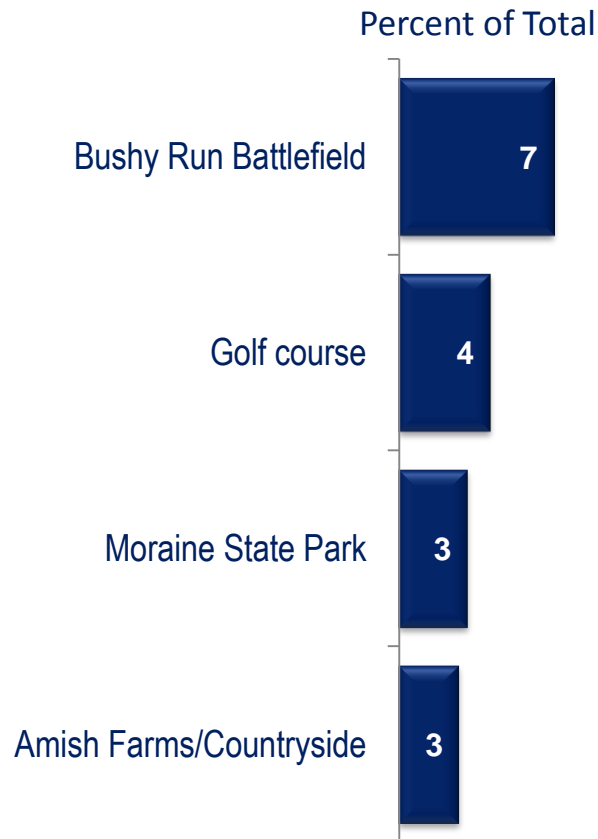
Percent of Total



# Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region\*



Base: Overnight Marketable Trips





# Pennsylvania Attractions/Events — Laurel Highlands Region\*



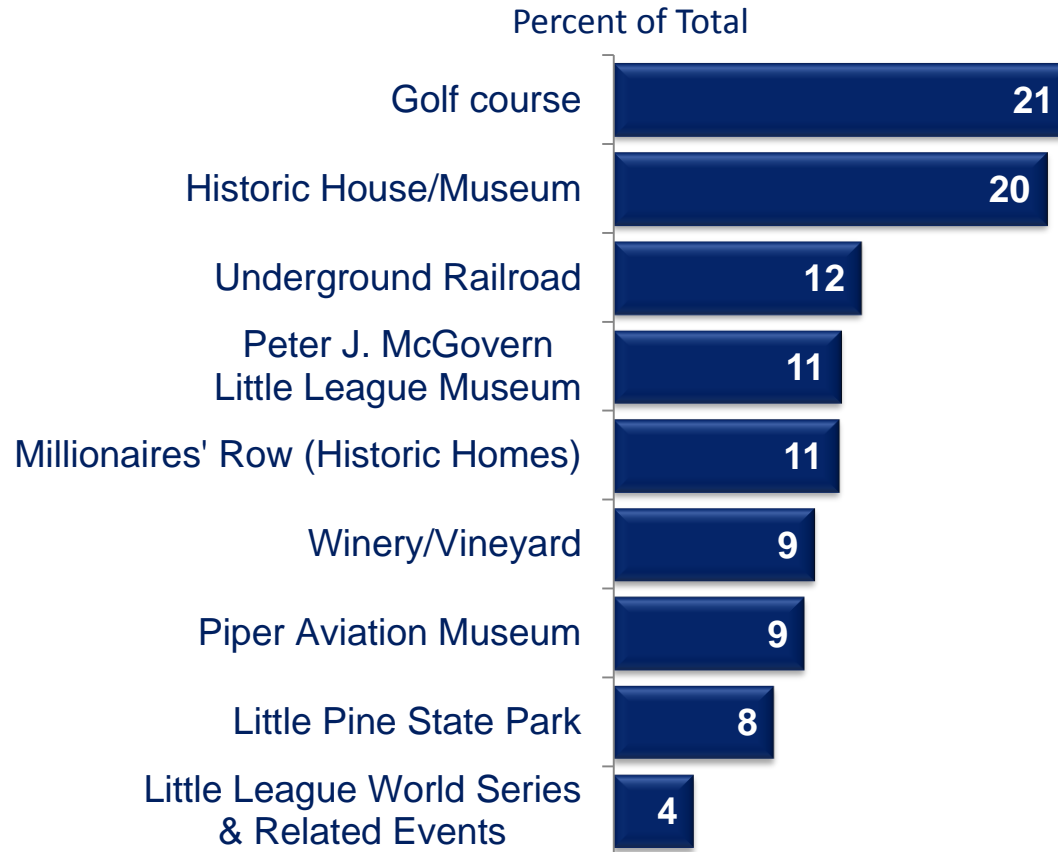
Base: Overnight Trips



# Pennsylvania Attractions/Events — Pennsylvania Wilds Region\*



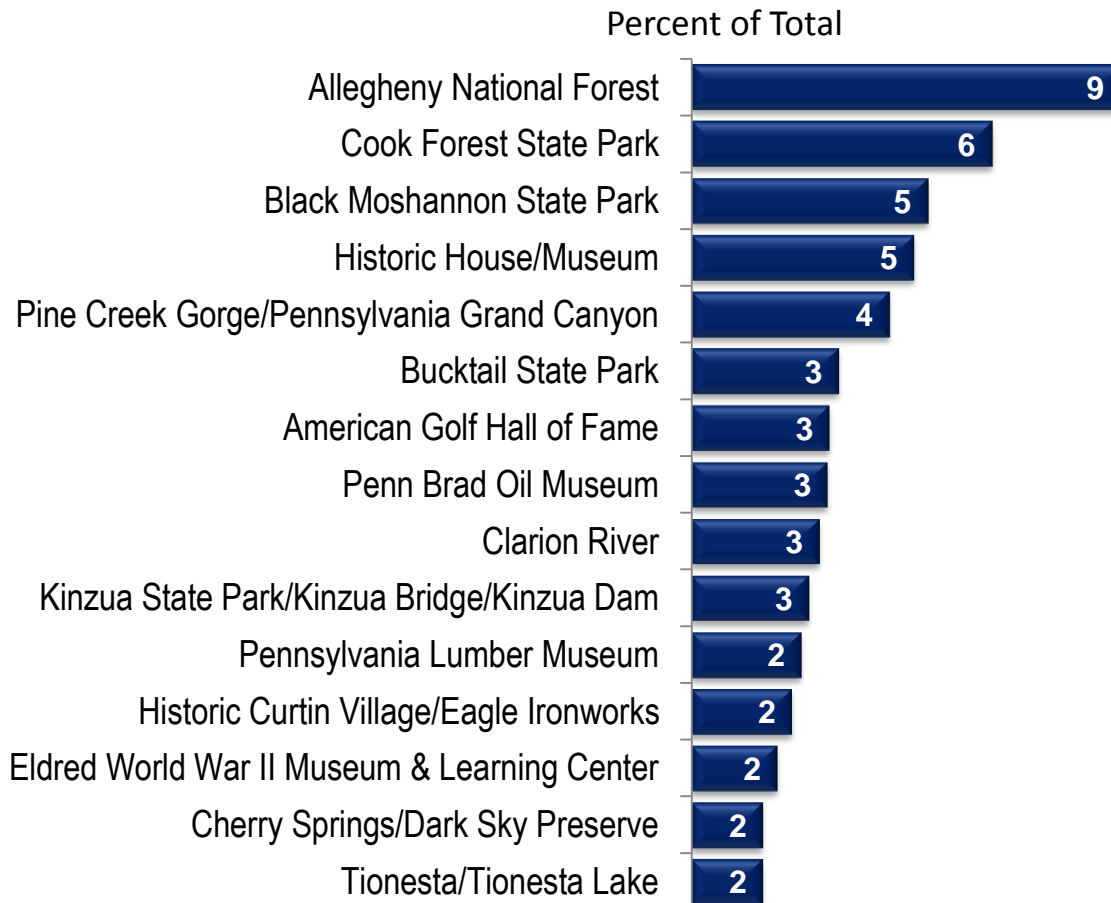
Base: Overnight Trips



# Pennsylvania Attractions/Events — Pennsylvania Wilds Region\*



Base: Overnight Trips

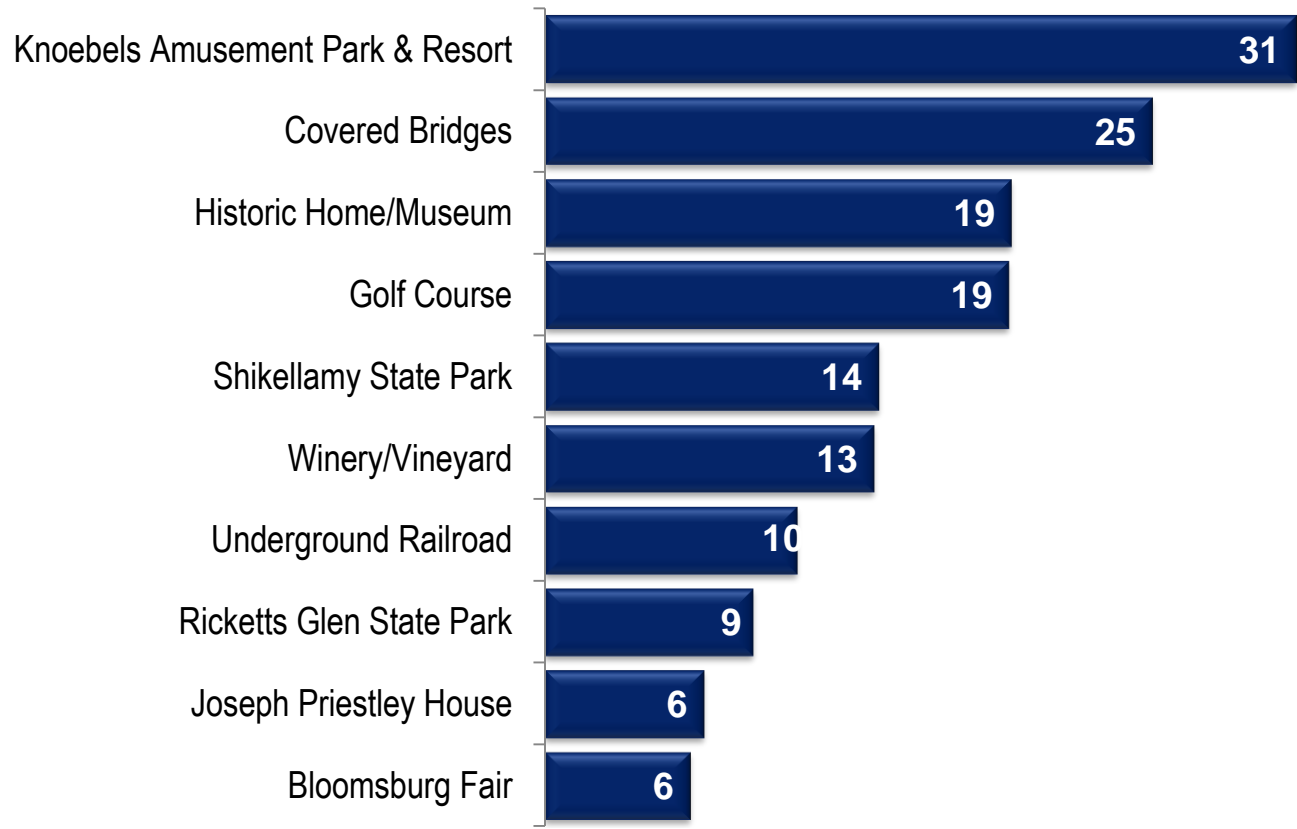


# Pennsylvania Attractions/Events — Valleys of the Susquehanna Region\*



Base: Overnight Trips

Percent of Total

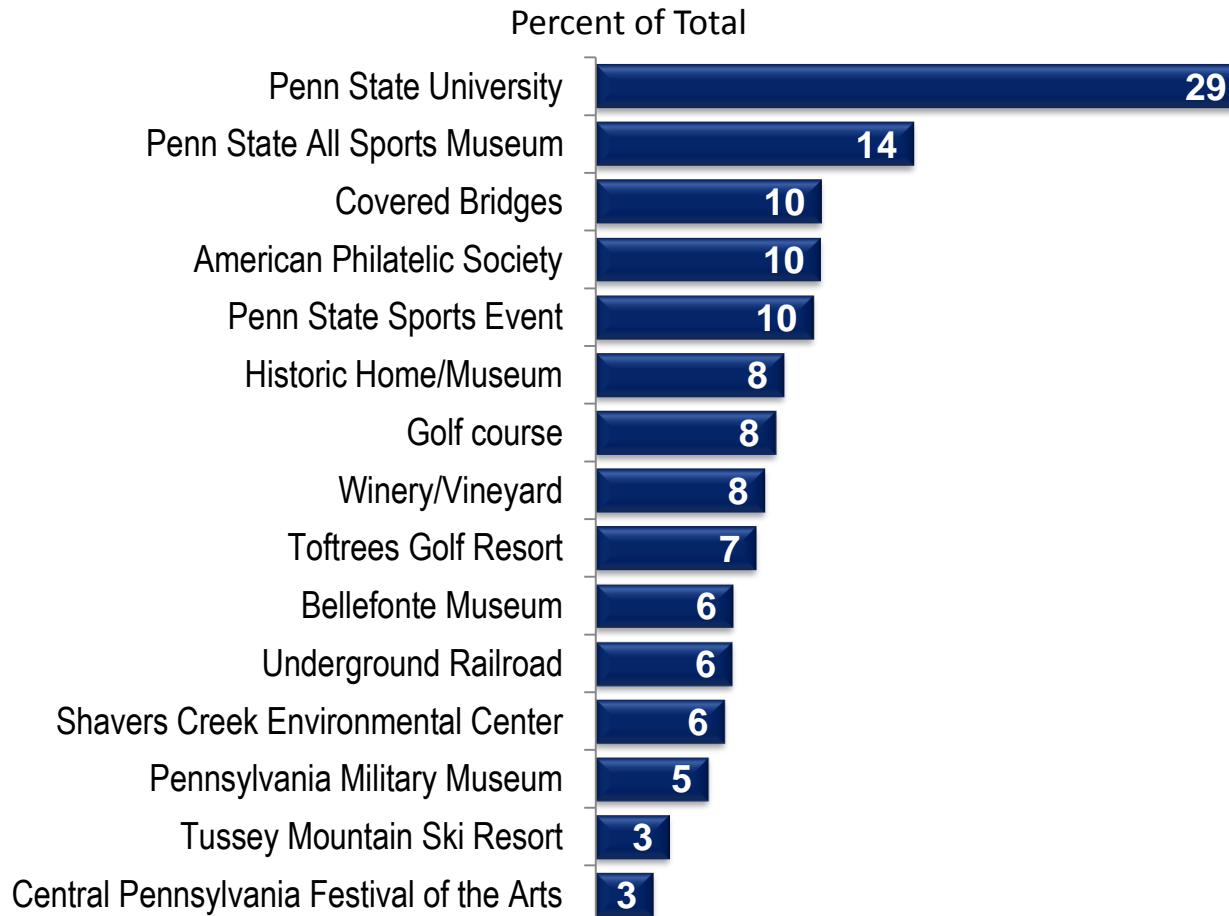


\*Caution: low base

# Pennsylvania Attractions/Events — The Alleghenies Region\*



Base: Overnight Trips

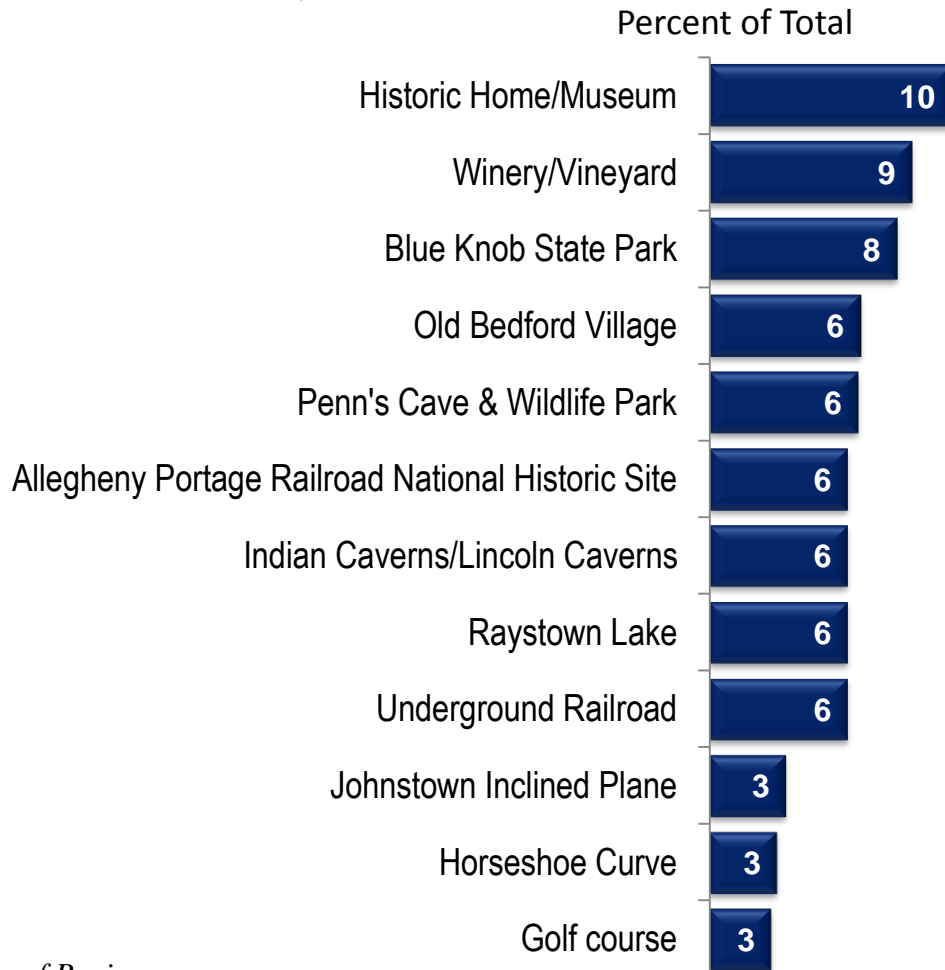


\*State College Region

# Pennsylvania Attractions/Events — The Alleghenies Region\*



Base: Overnight Trips



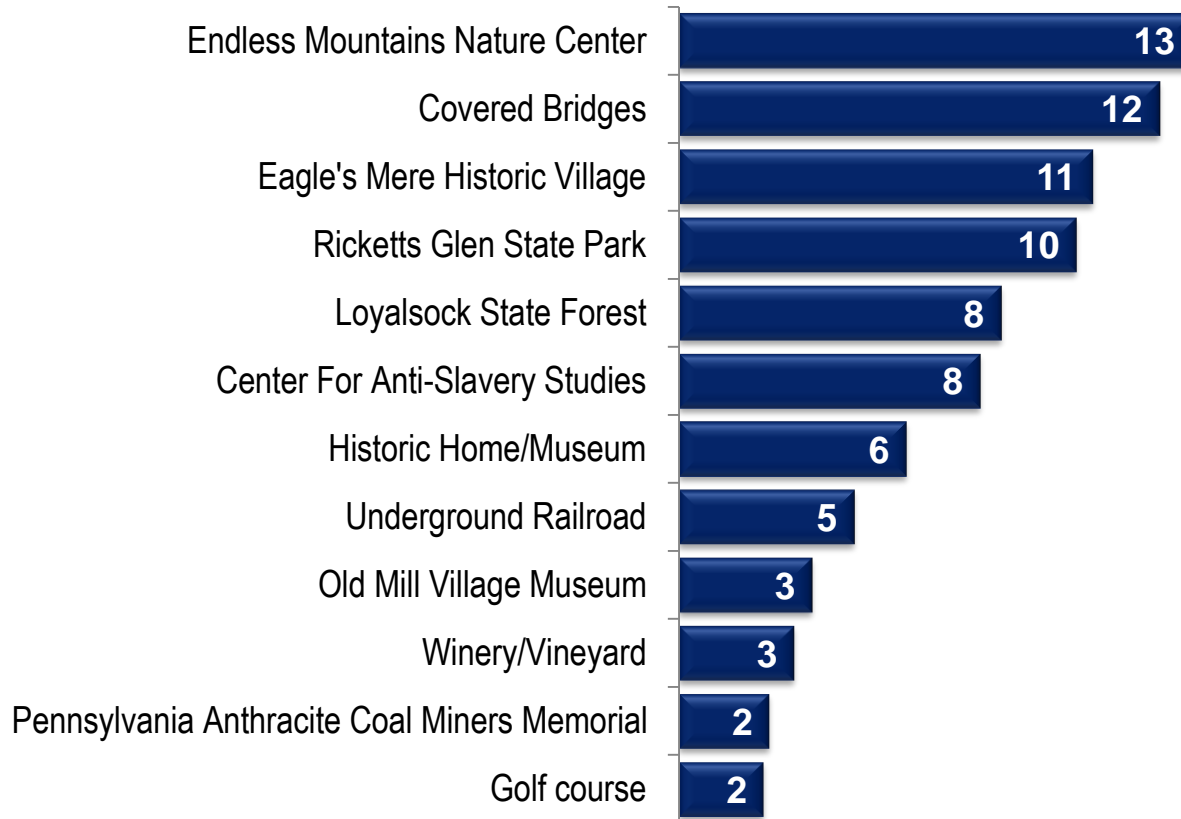
\*Remainder of Region

# Pennsylvania Attractions/Events — Upstate PA Region\*



Base: Overnight Trips

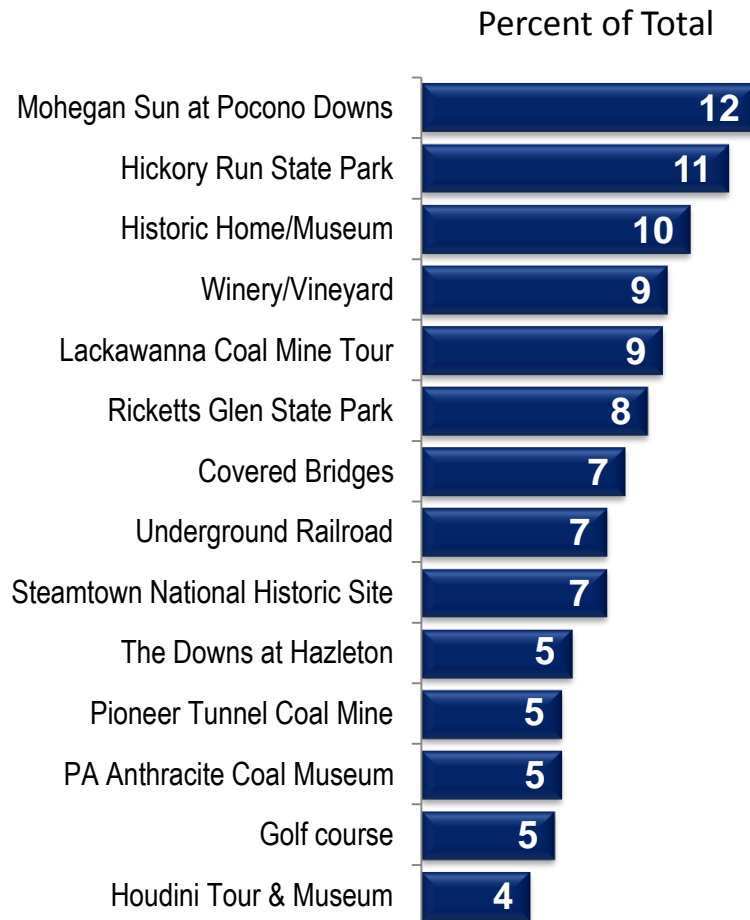
Percent of Total



# Pennsylvania Attractions/Events — Upstate PA Region\*



Base: Overnight Trips

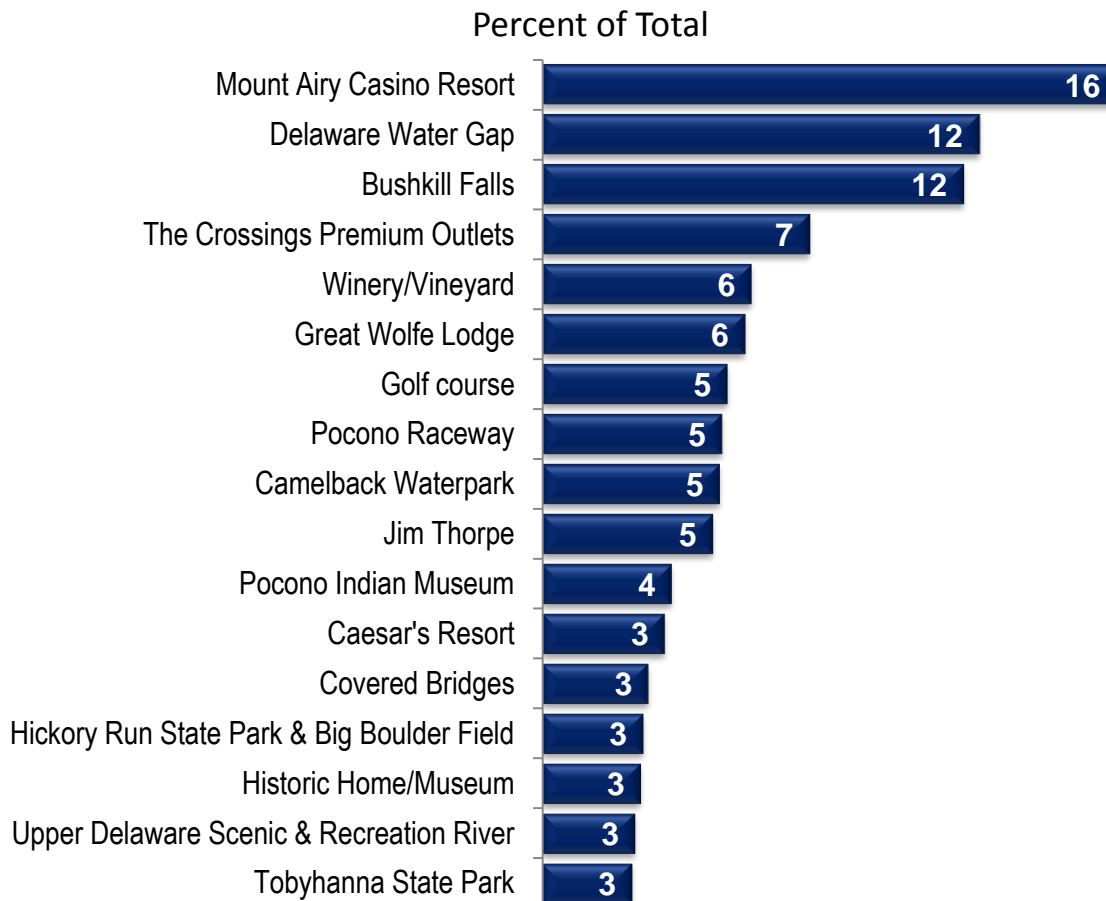




# Pennsylvania Attractions/Events — Pocono Mountains Region



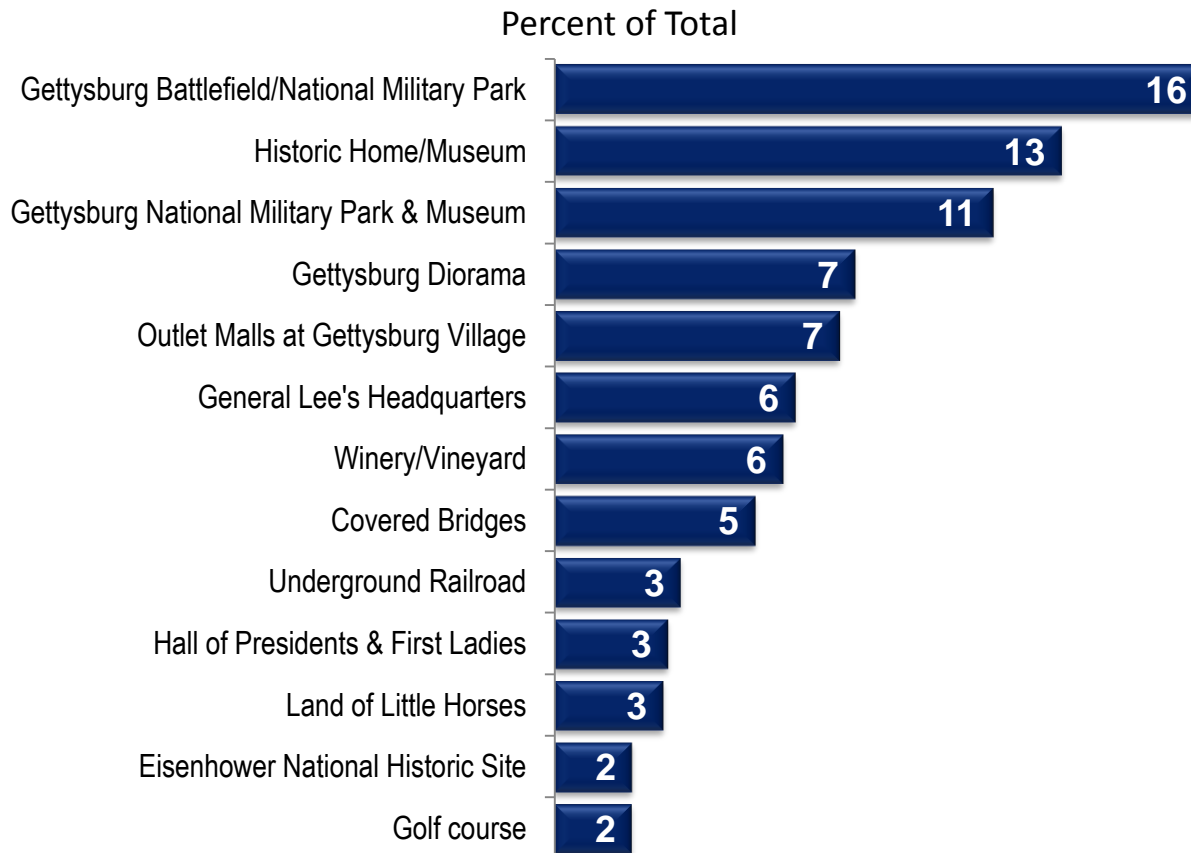
Base: Overnight Marketable Trips



# Pennsylvania Attractions/Events — Dutch Country Roads Region\*



Base: Overnight Marketable Trips

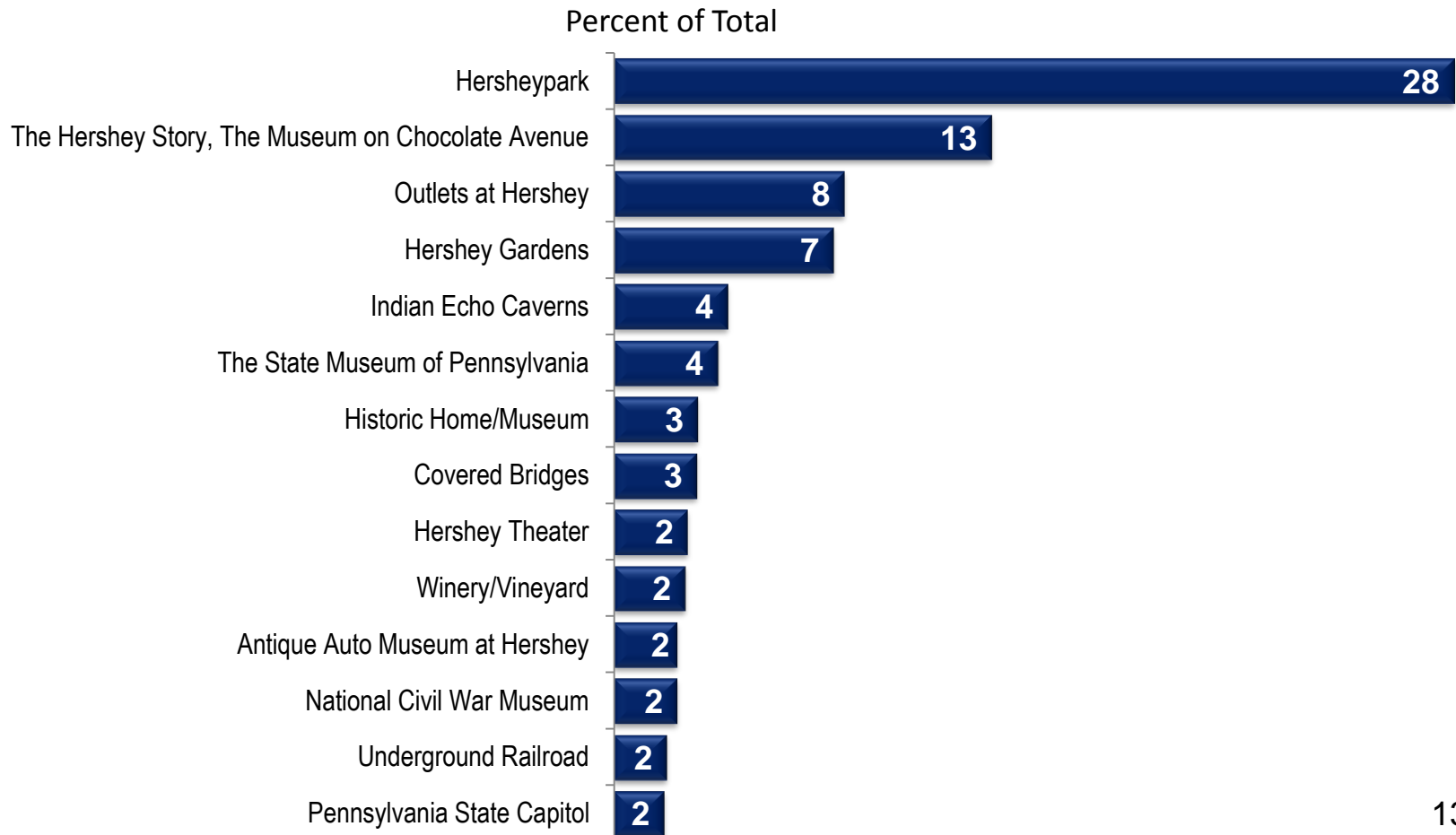


\*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net attendance of 19%

# Pennsylvania Attractions/Events — Dutch Country Roads Region\*



Base: Overnight Marketable Trips



\* Harrisburg/Hershey Area

# Pennsylvania Attractions/Events — Dutch Country Roads Region\*



Base: Overnight Marketable Trips

Percent of Total

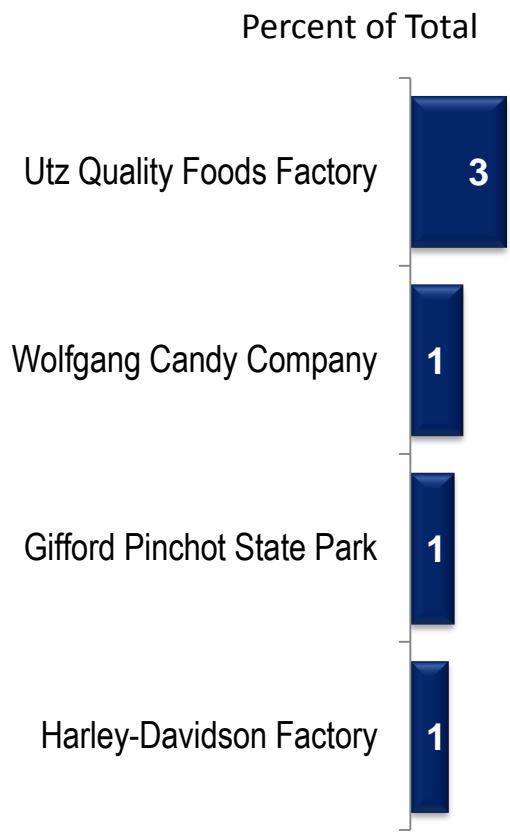


\*Lancaster Amish Farmland

# Pennsylvania Attractions/Events — Dutch Country Roads Region\*



Base: Overnight Marketable Trips

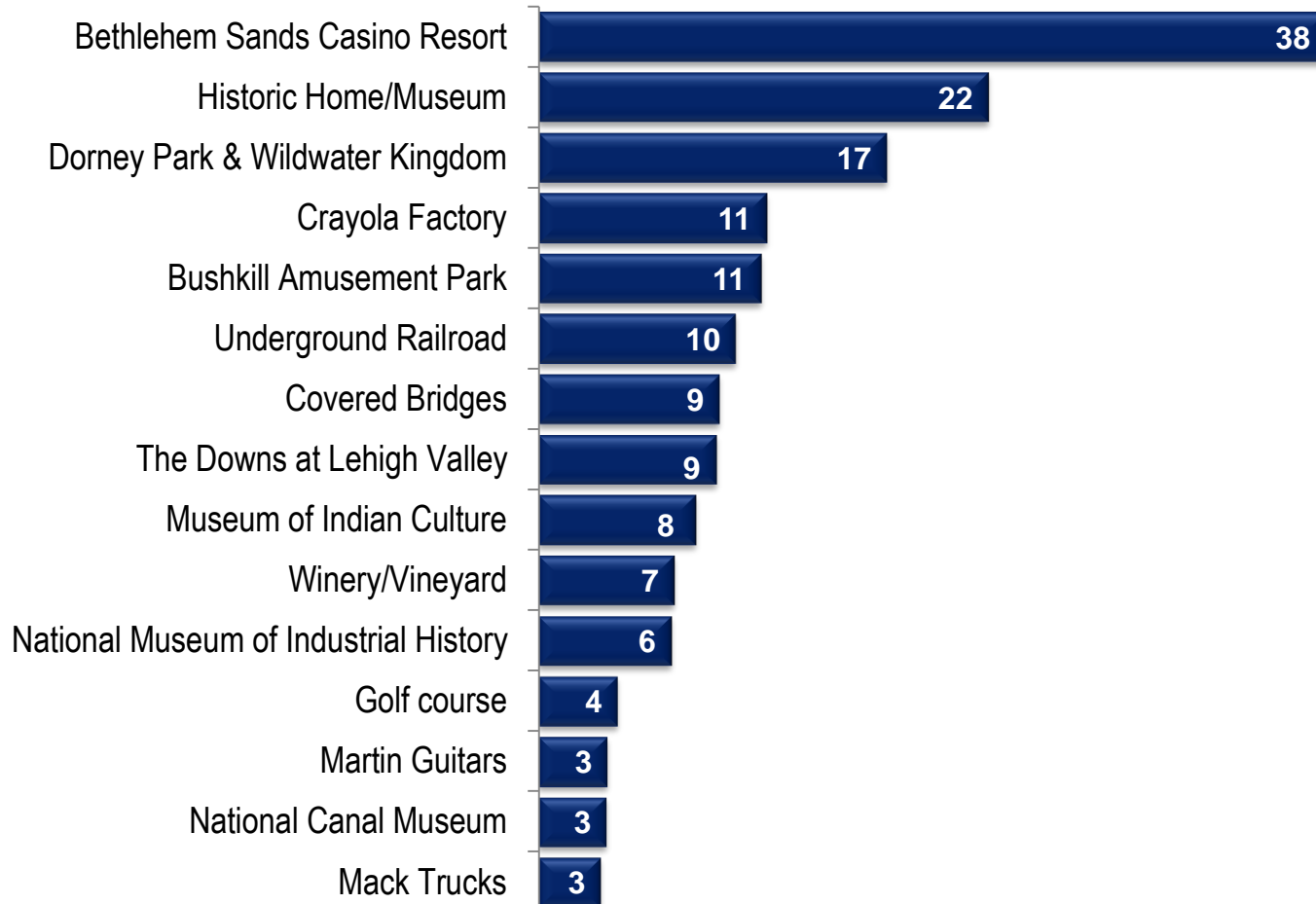


# Pennsylvania Attractions/Events — Lehigh Valley Region\*



Base: Overnight Trips

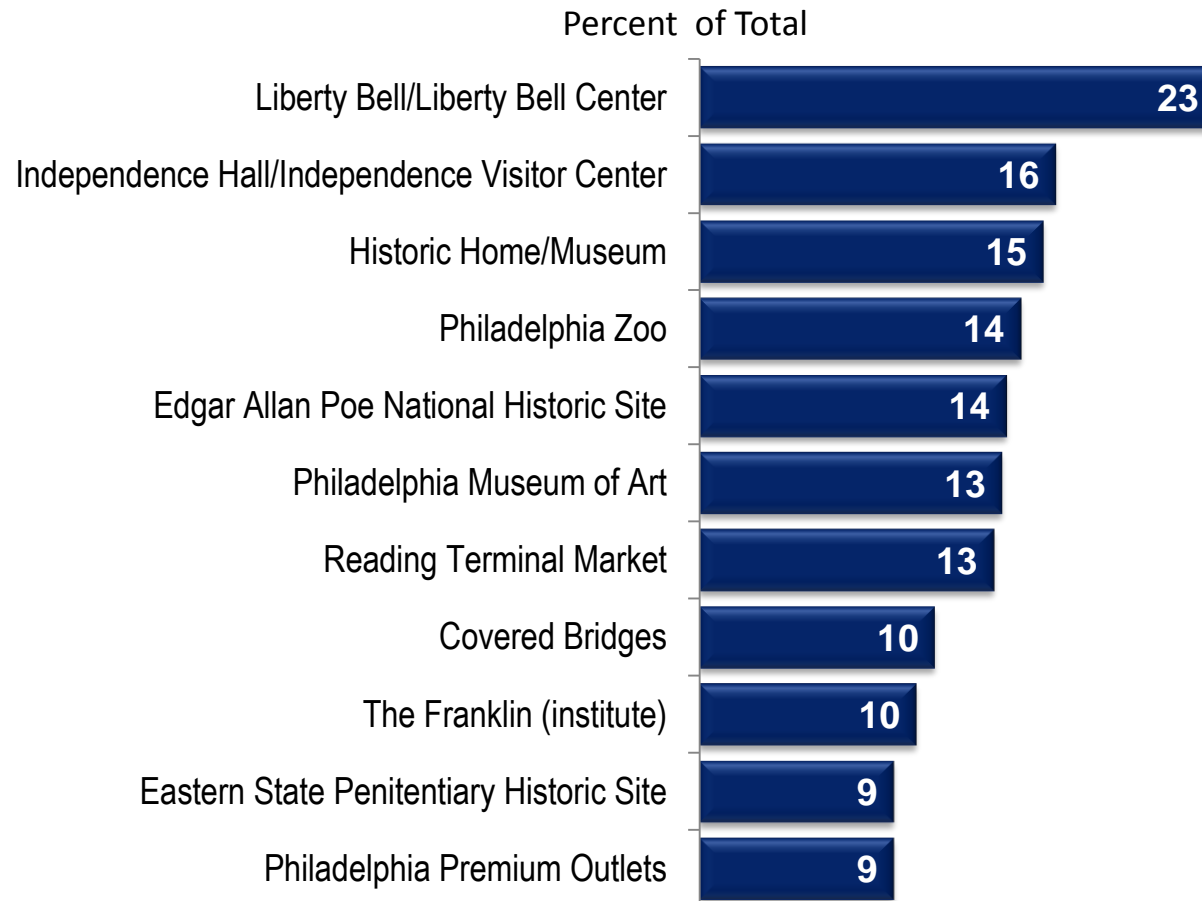
Percent of Total



# Pennsylvania Attractions/Events — Philadelphia & The Countryside Region\*



Base: Overnight Marketable Trips



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



Base: Overnight Marketable Trips

Percent of Total



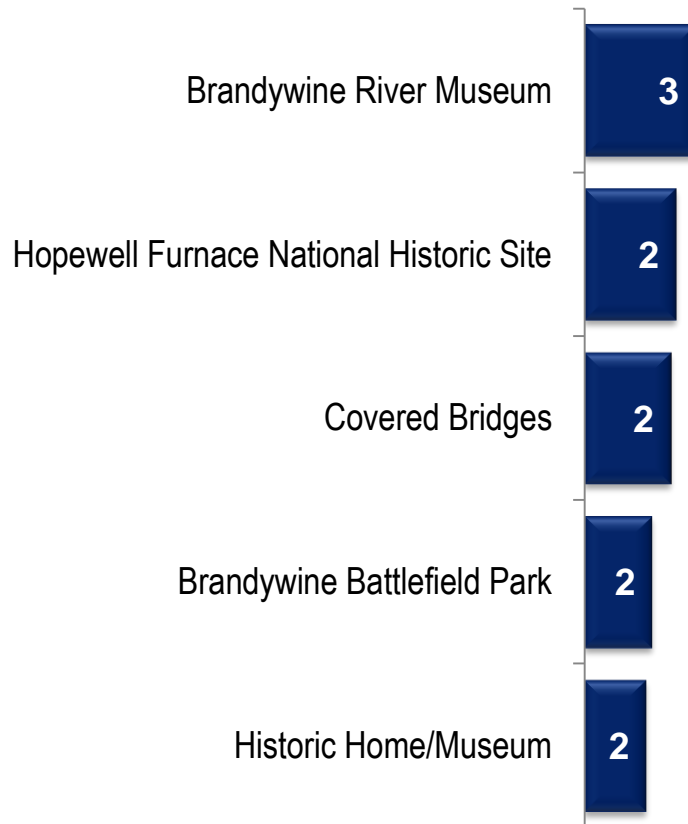


# Pennsylvania Attractions/Events — Philadelphia & The Countryside Region\*



Base: Overnight Marketable Trips

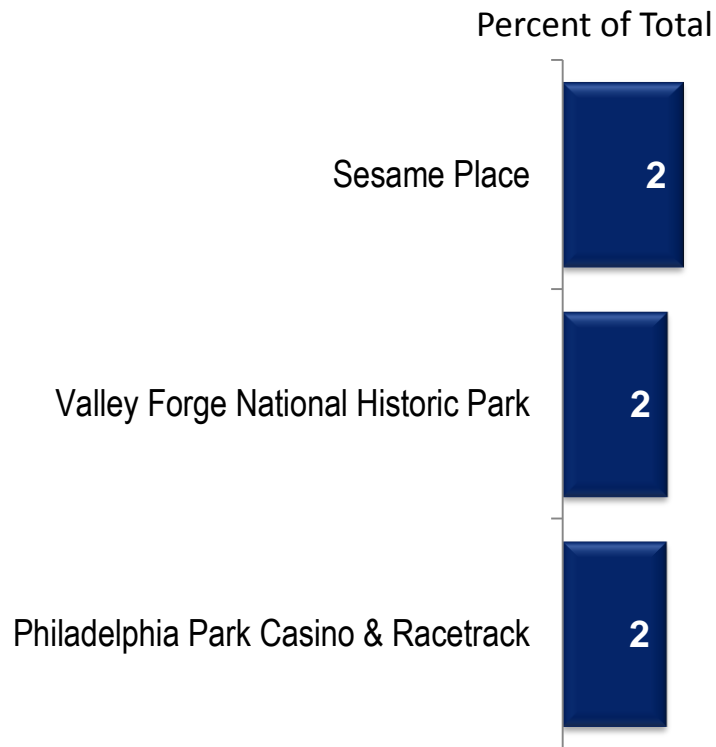
Percent of Total



# Pennsylvania Attractions/Events — Philadelphia & The Countryside Region\*



Base: Overnight Marketable Trips



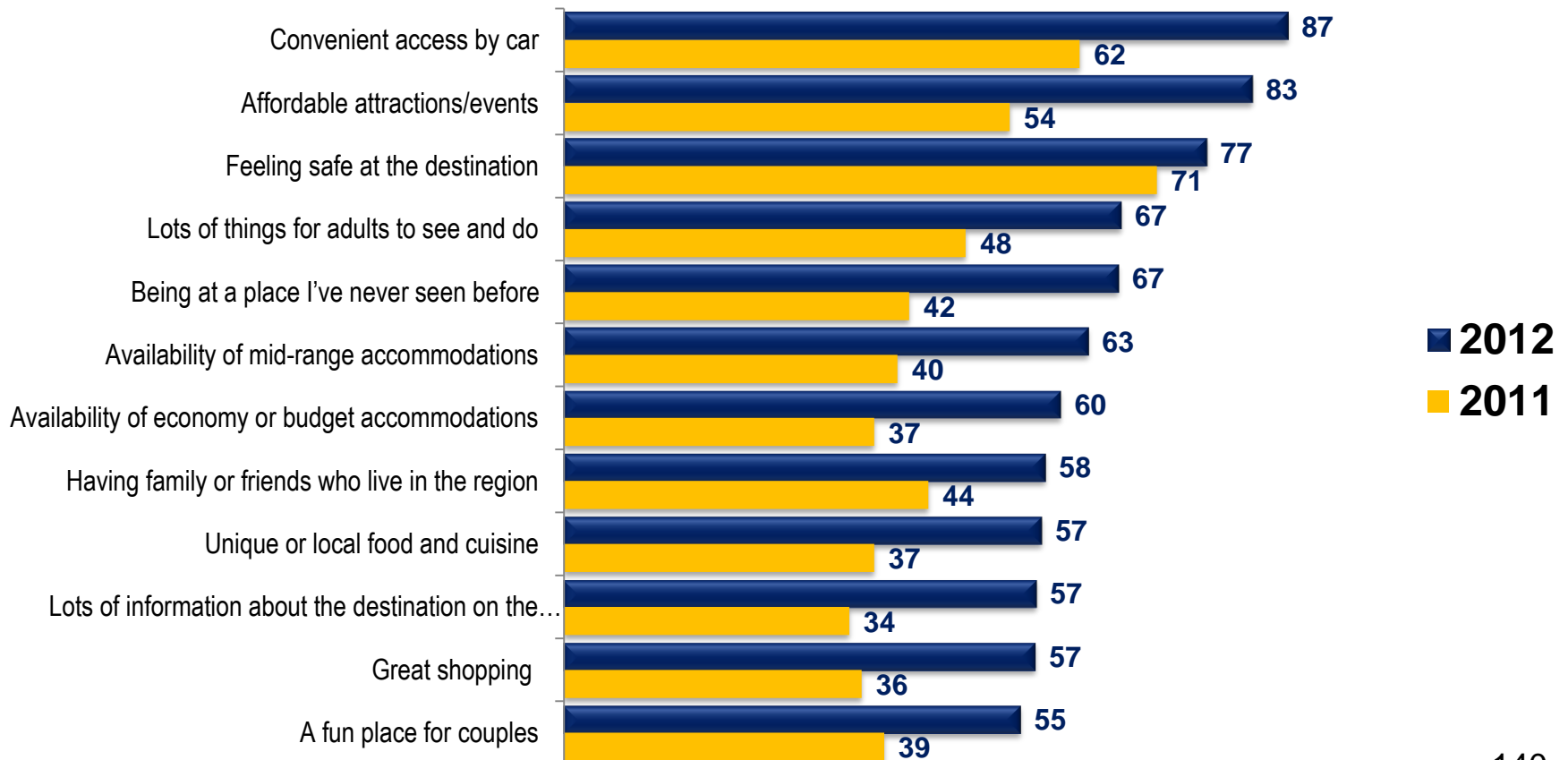
# **Importance of Factors in Choice of Pennsylvania Tourism Region**

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



Base: Overnight Trips

% Rating Factor As Very Important\*



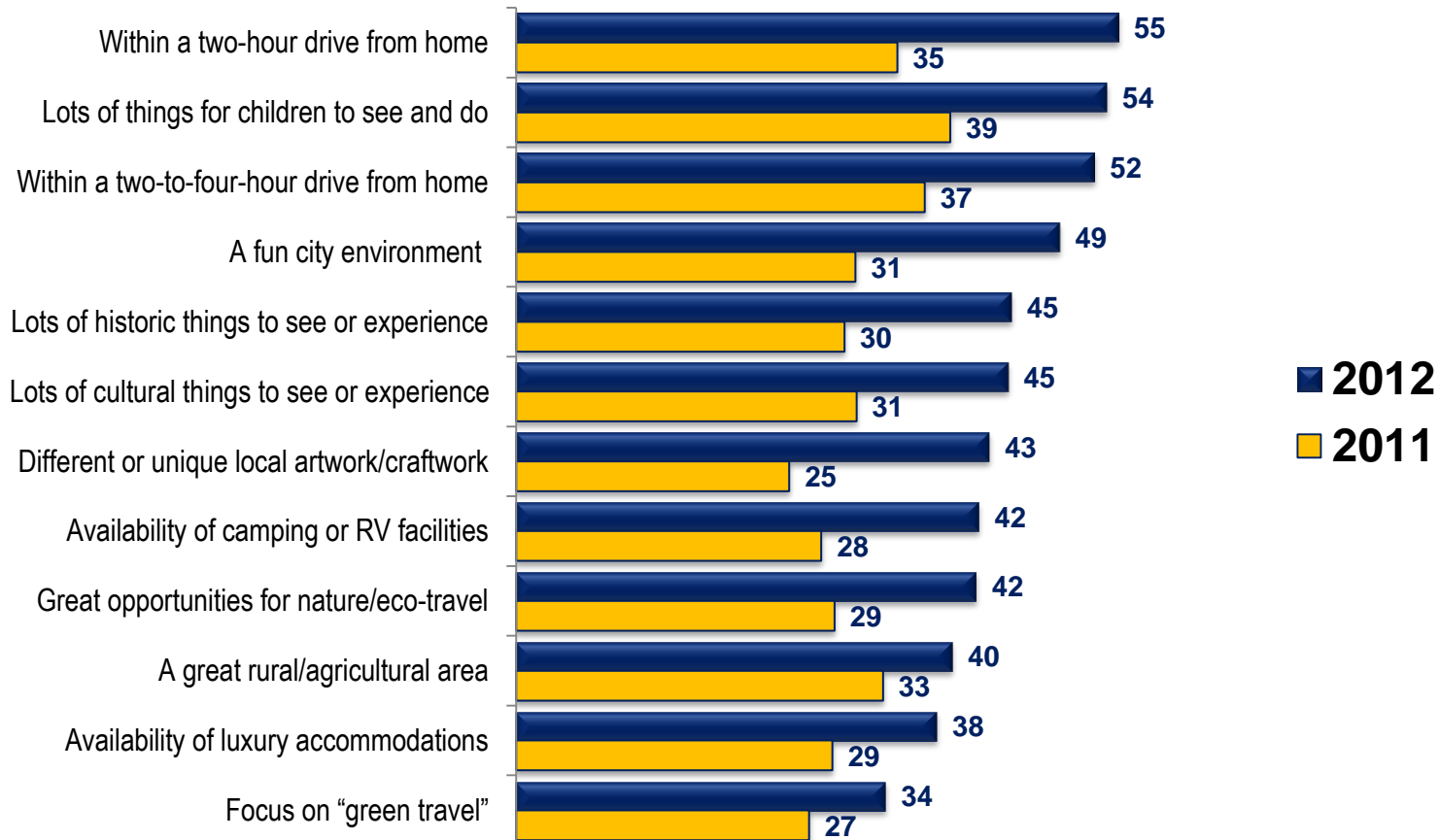
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



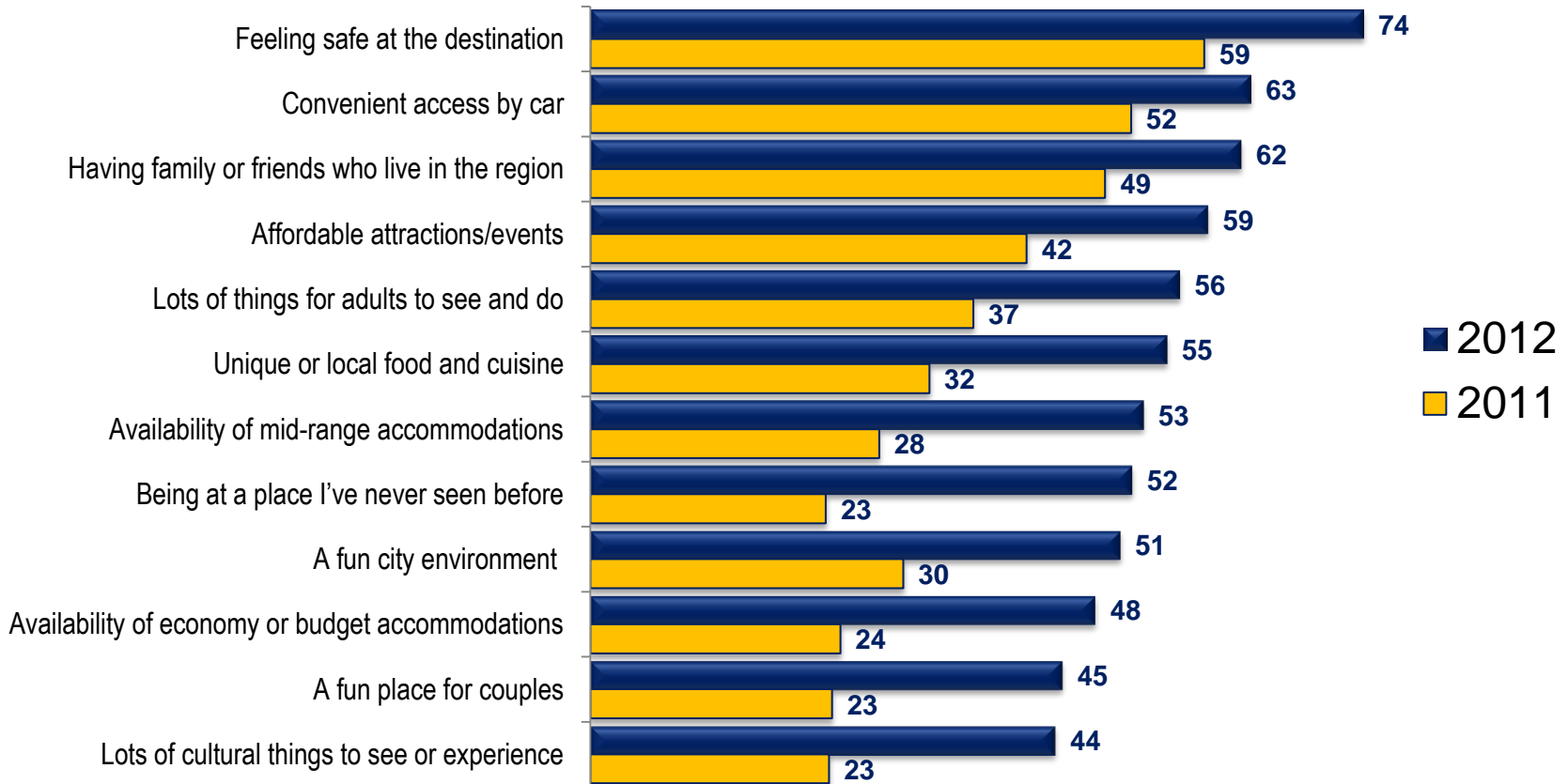
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Pittsburgh & Its Countryside



Base: Overnight Trips

% Rating Factor As Very Important\*



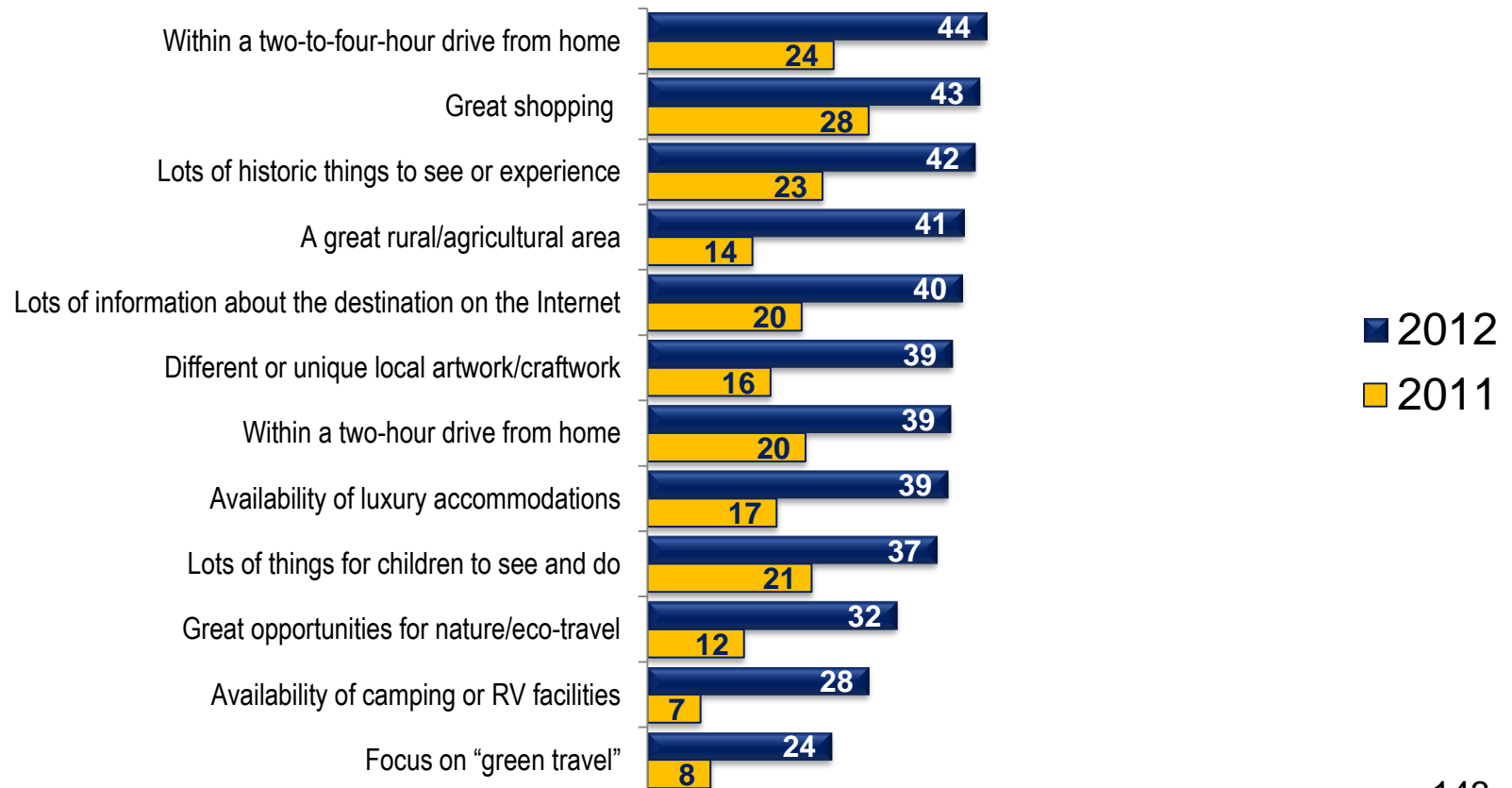
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



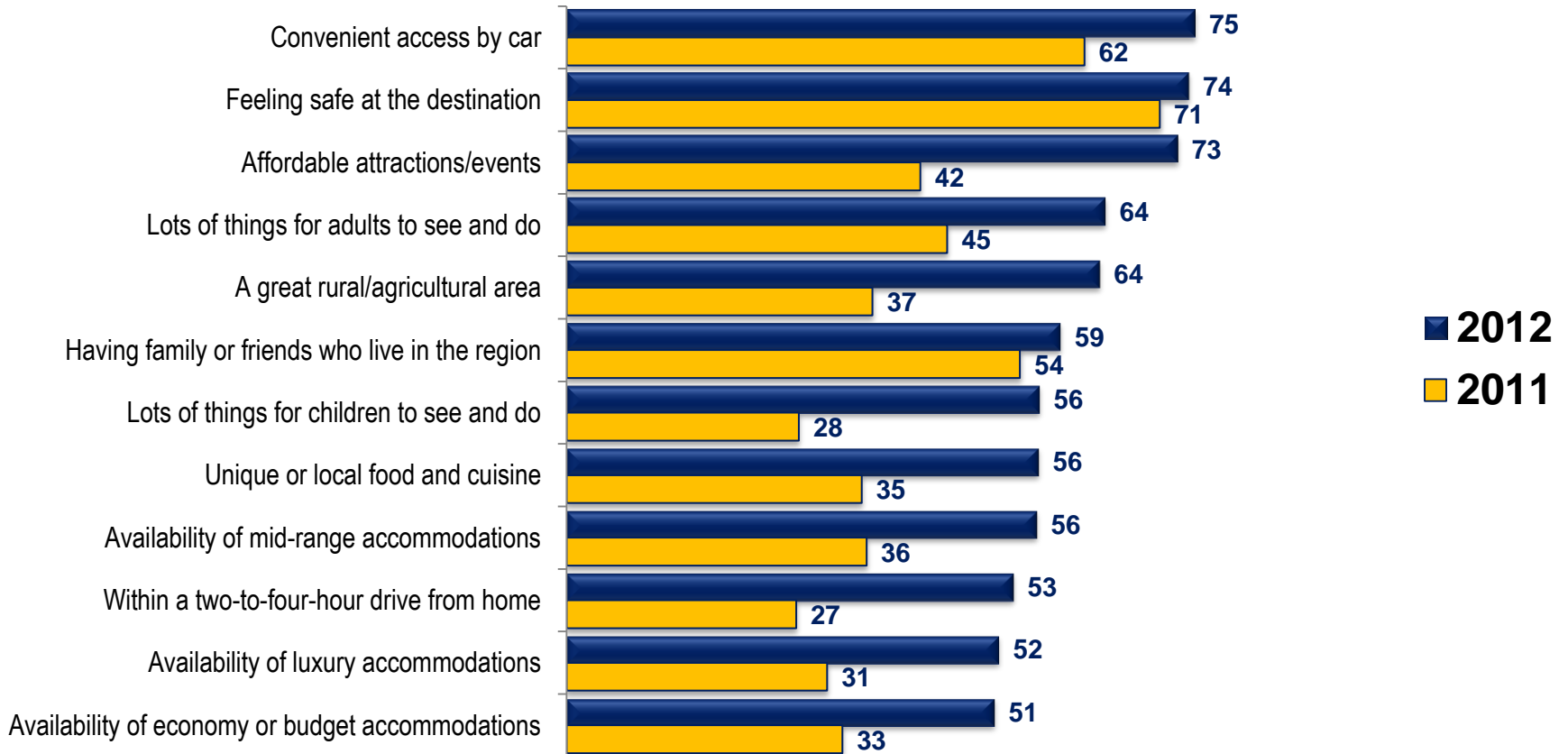
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Laurel Highlands Region



Base: Overnight Trips

% Rating Factor As Very Important\*



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

*\*Caution: low base*

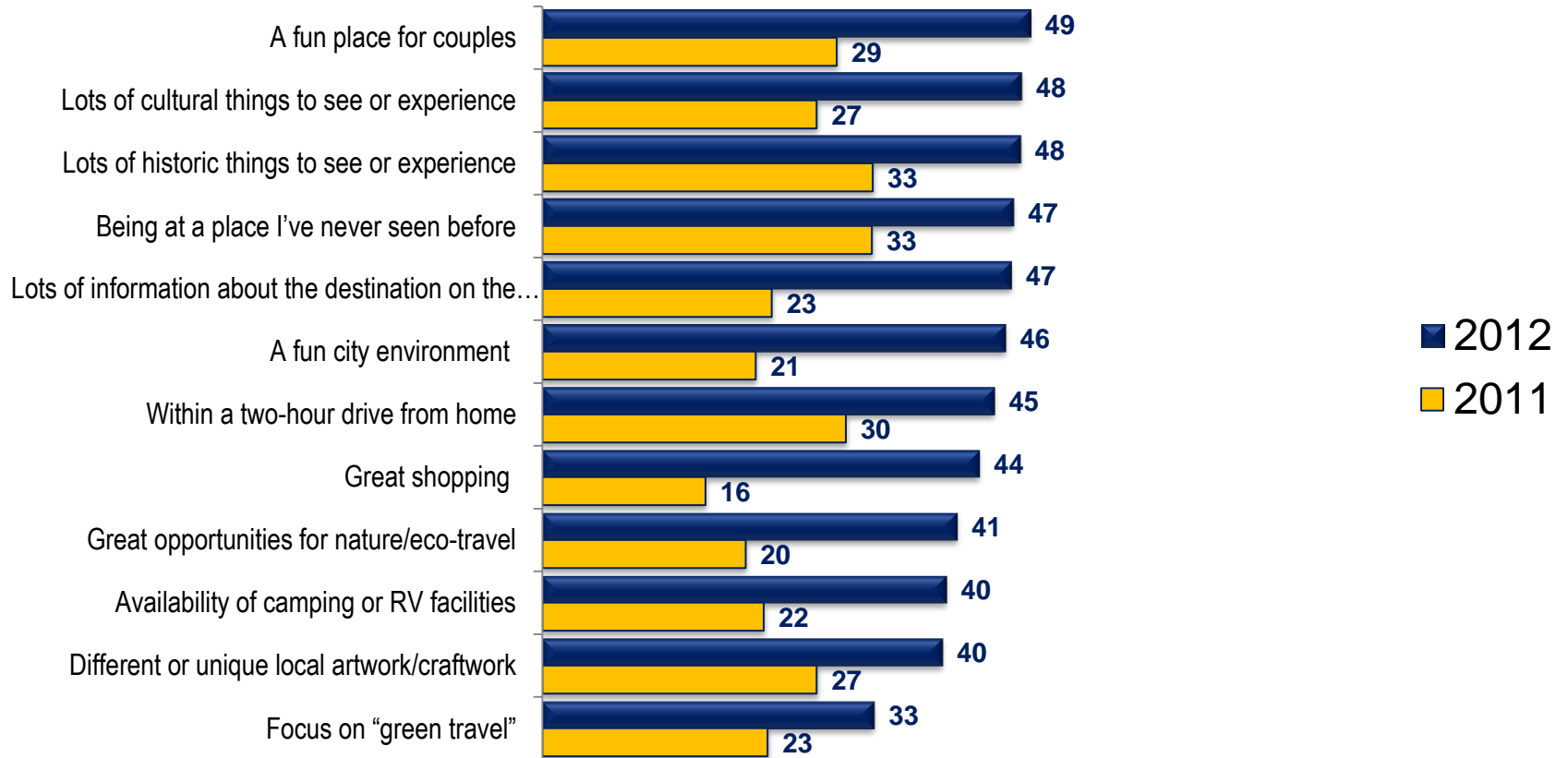


# Importance of Factors In Choosing to Visit Laurel Highlands Region (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important\*



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

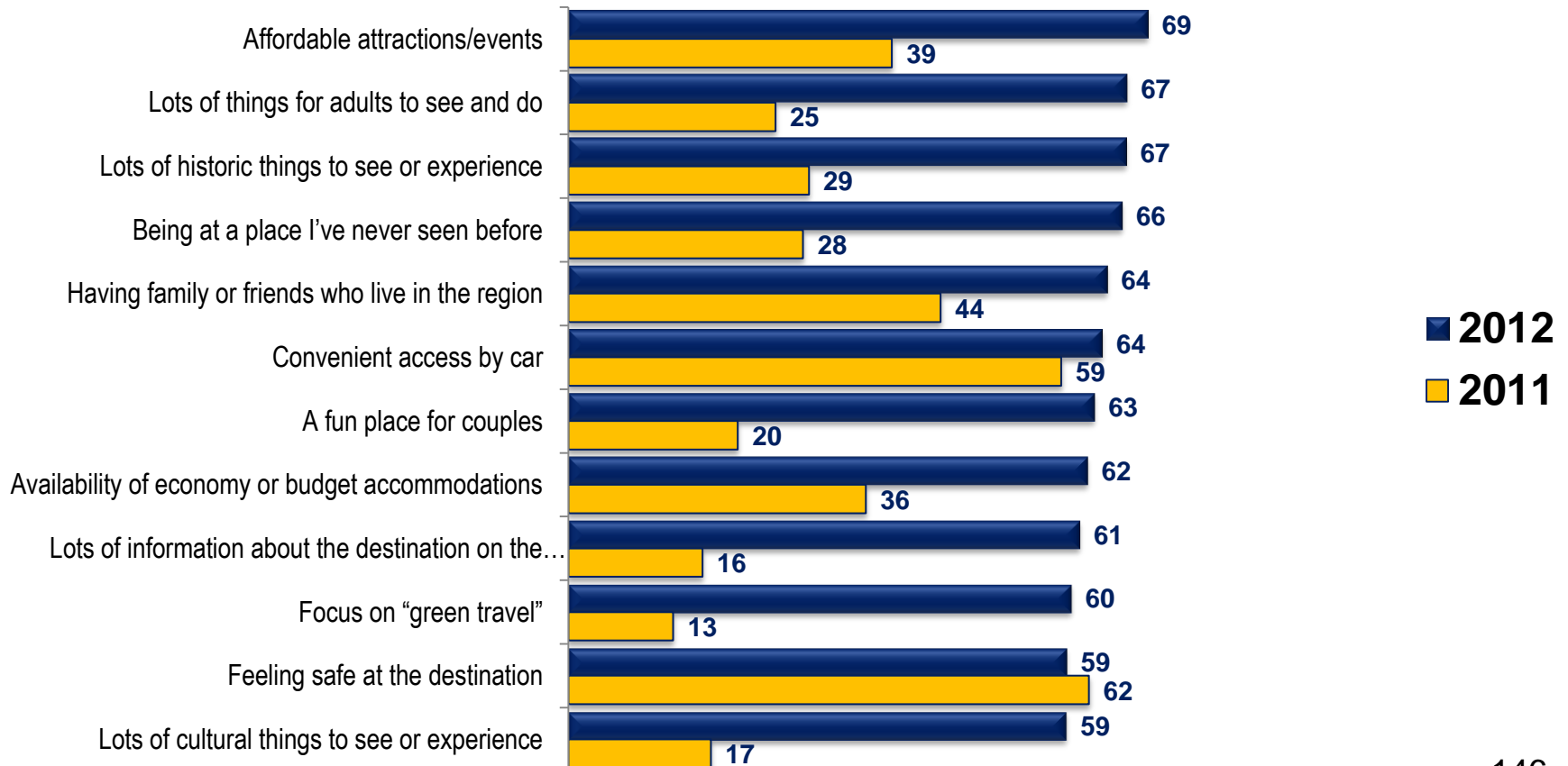
*\*Caution: low base*

# Importance of Factors In Choosing to Visit Pennsylvania Wilds



Base: Overnight Trips

% Rating Factor As Very Important\*



■ 2012  
■ 2011

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

\* Caution - low base size.

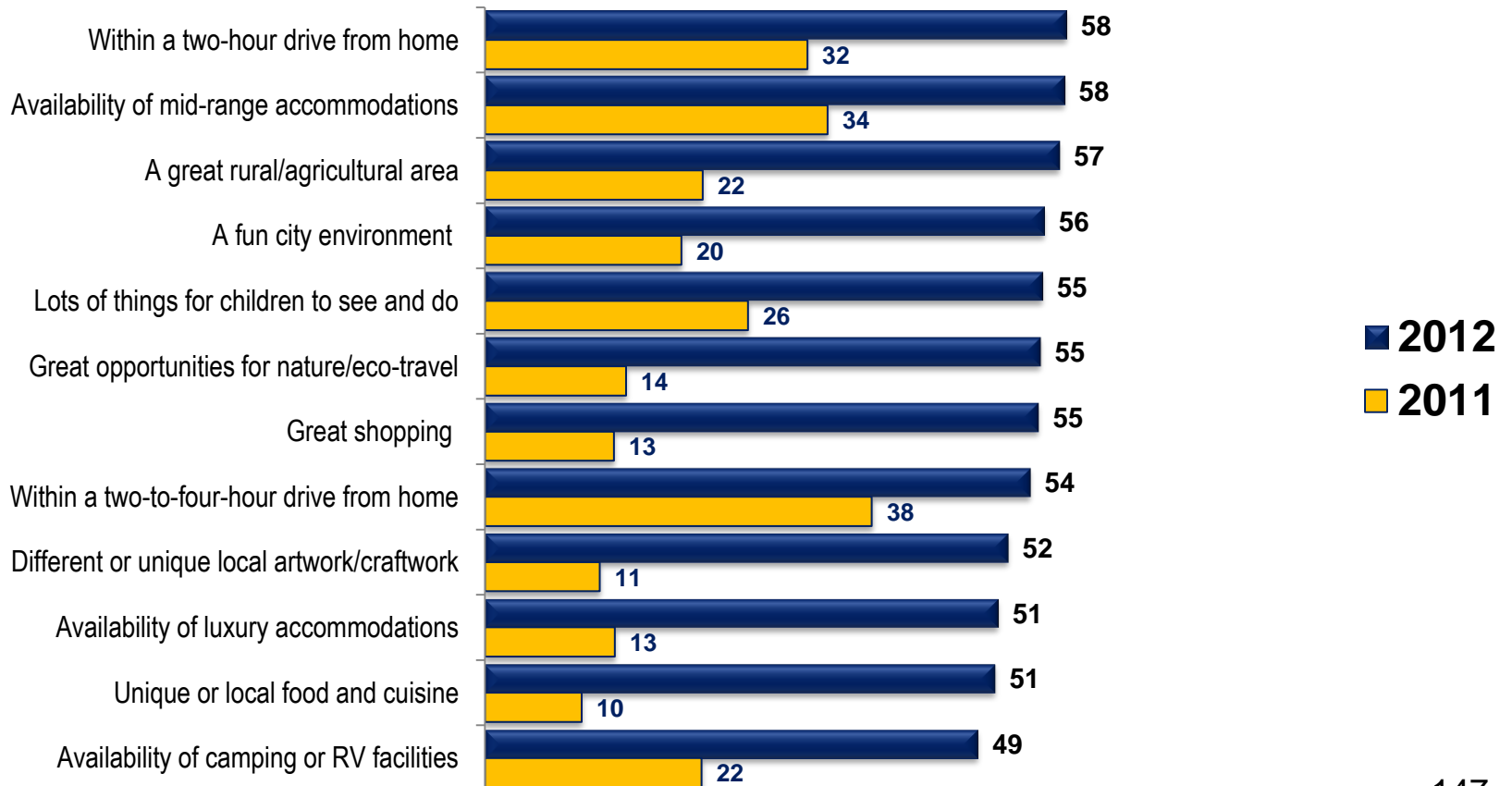
*\*Caution: low base*

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



Base: Overnight Trips

% Rating Factor As Very Important\*



■ 2012  
■ 2011

\* Rated 8, 9 or 10 on 10-pt. Importance scale  
\* Caution - low base size.

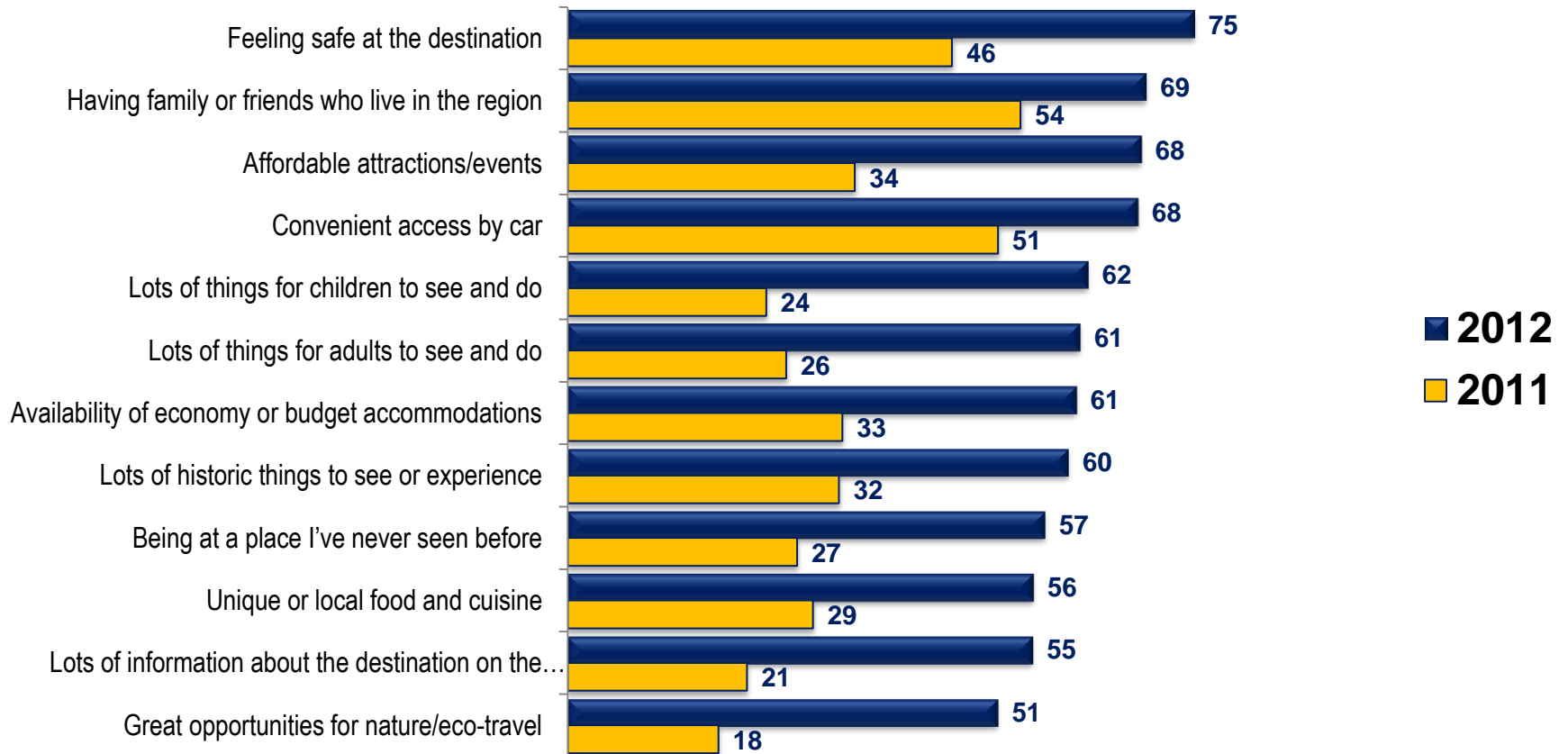
*\*Caution: low base*

# 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

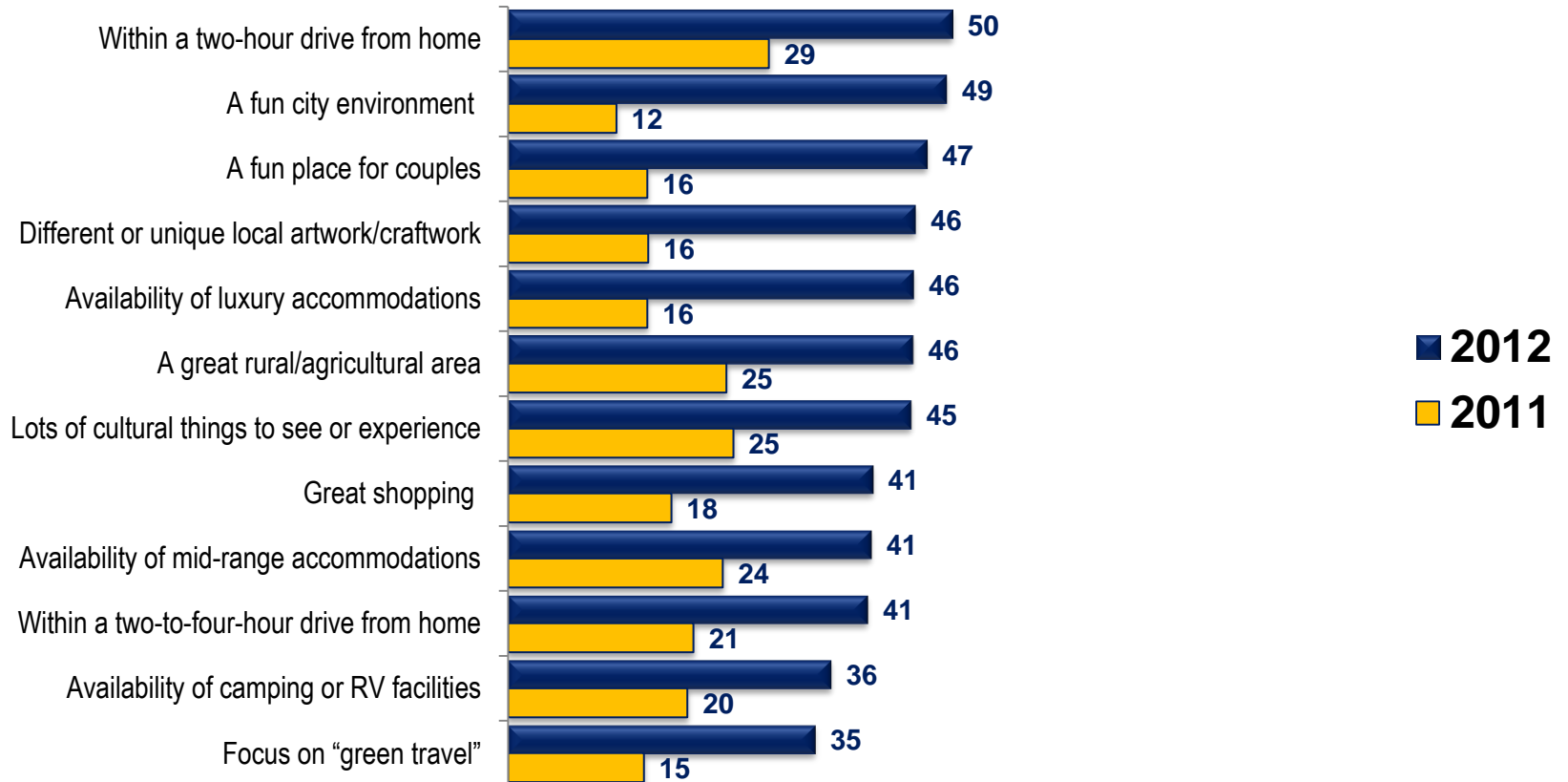
*\*Caution: low base*

# 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

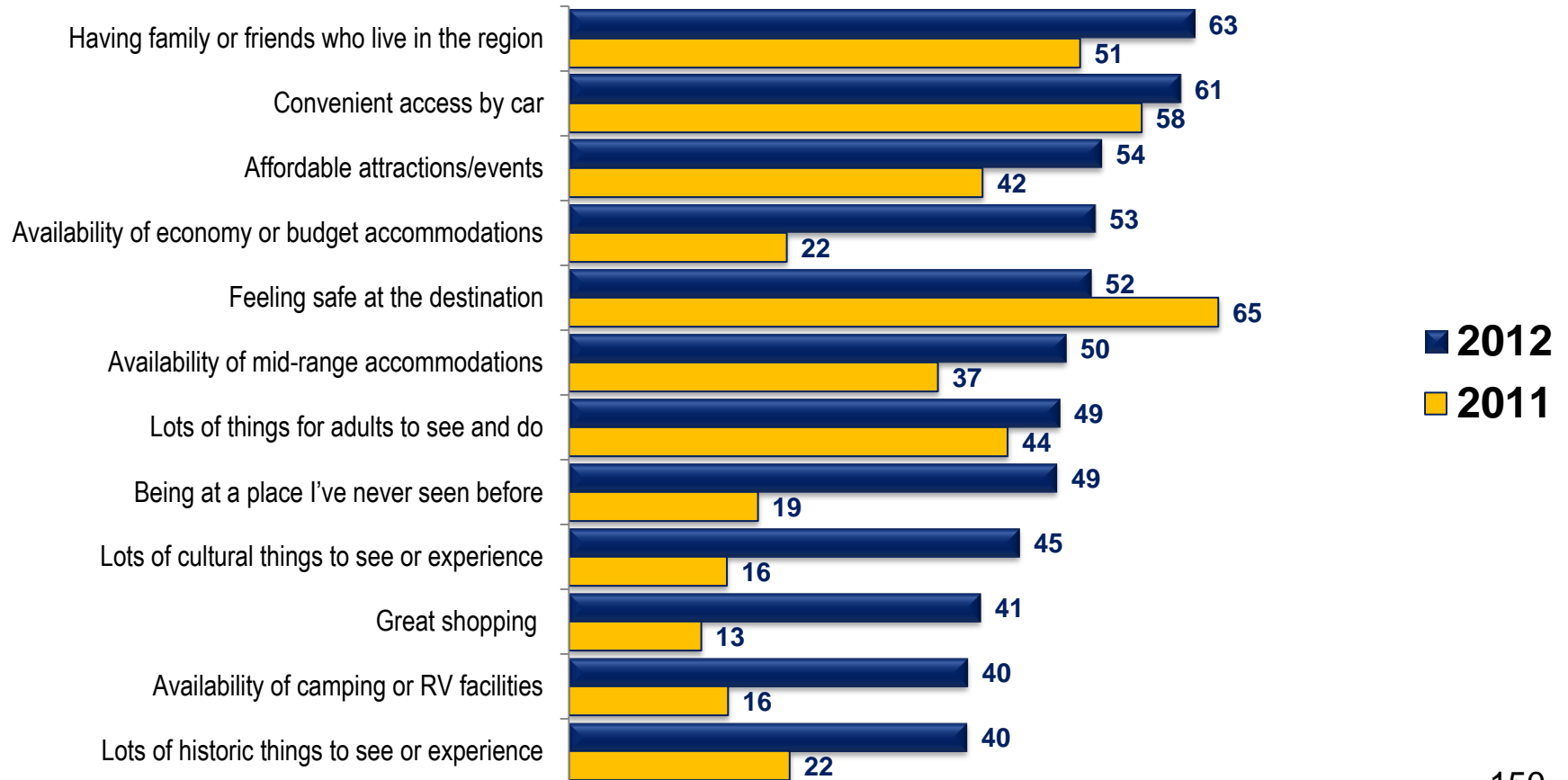
*\*Caution: low base*

# Importance of Factors In Choosing to Visit The Alleghenies Region



Base: Overnight Trips

% Rating Factor As Very Important\*



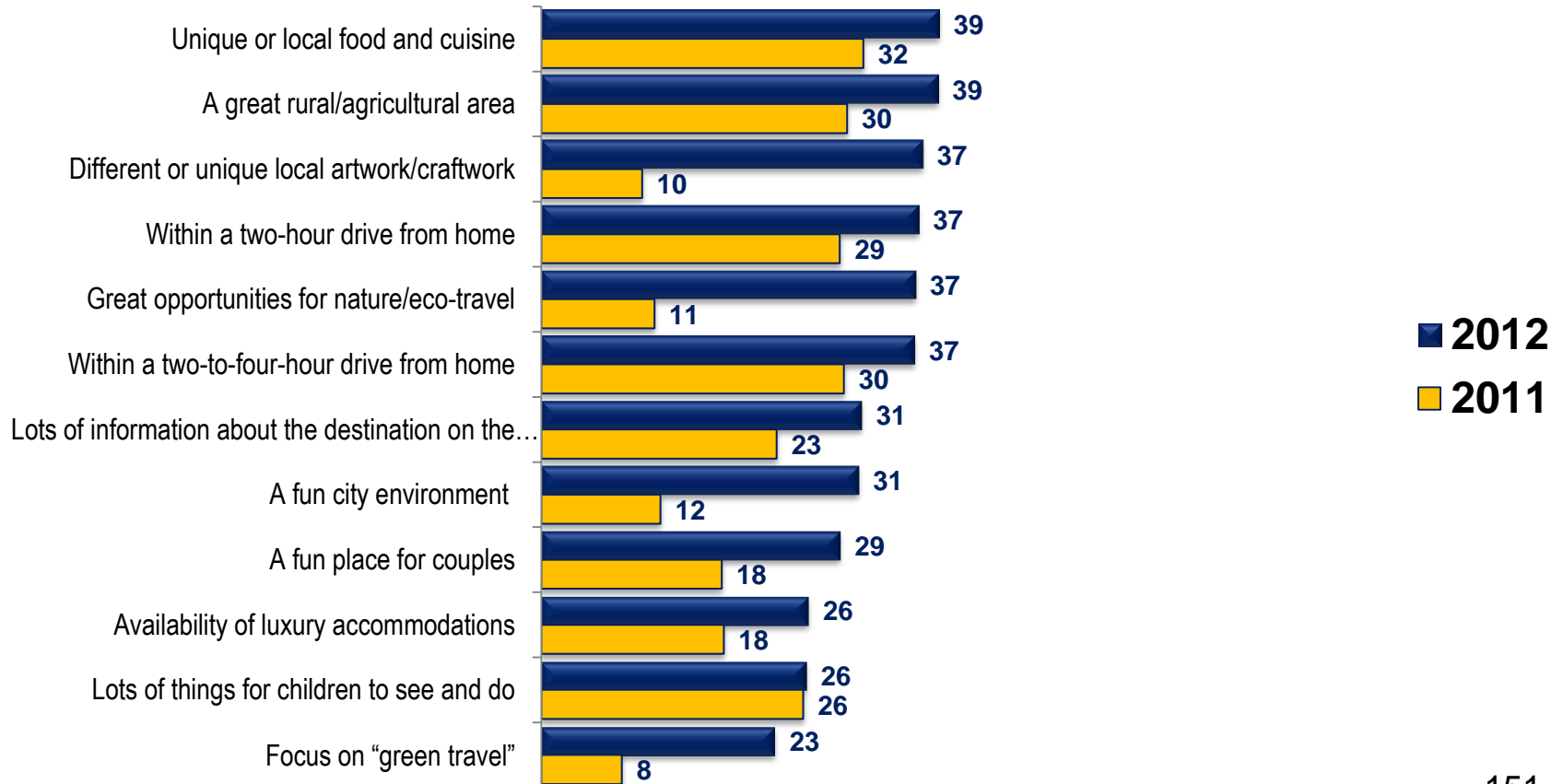
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



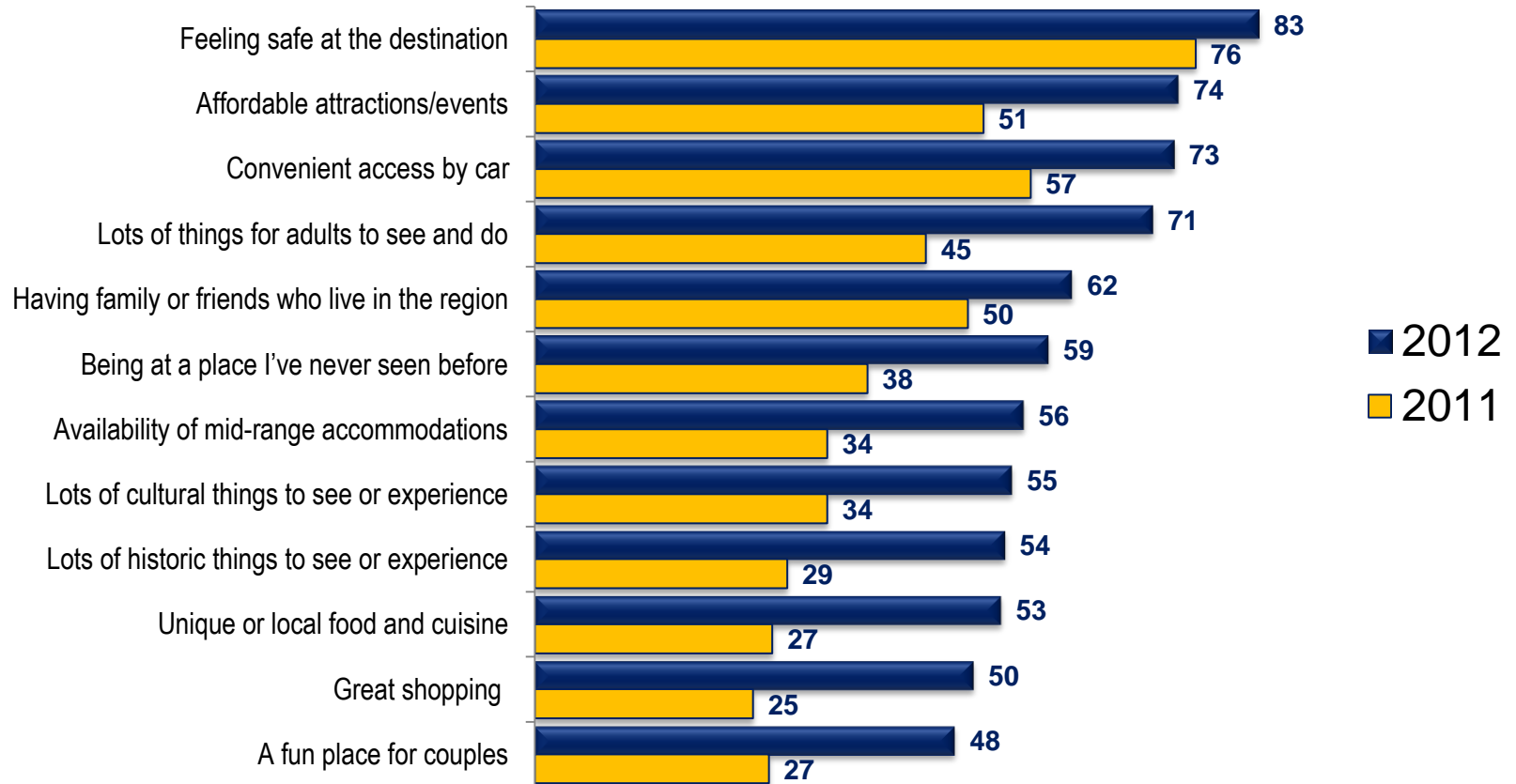
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# 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

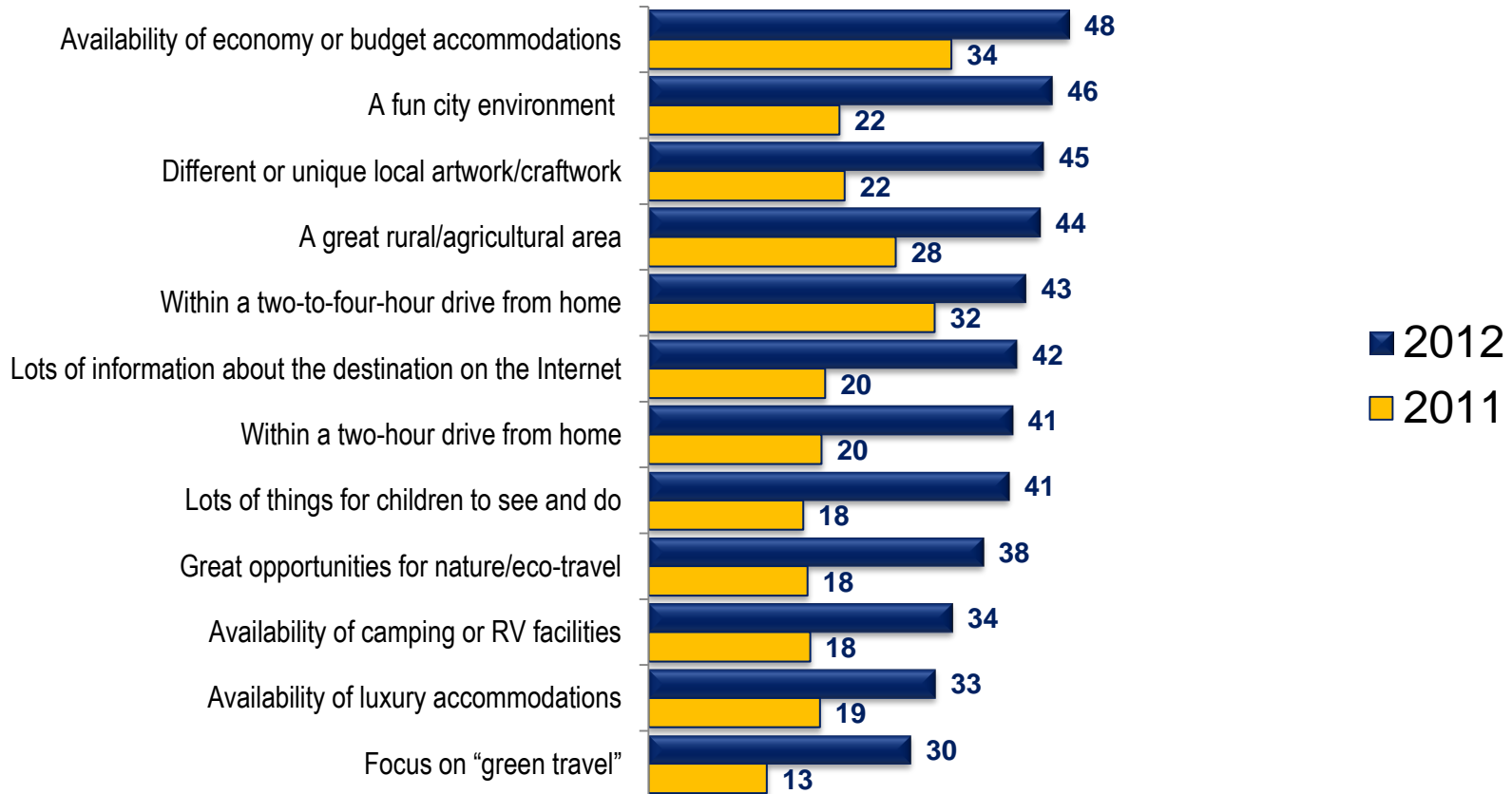


# Importance of Factors In Choosing to Visit Upstate PA (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important\*



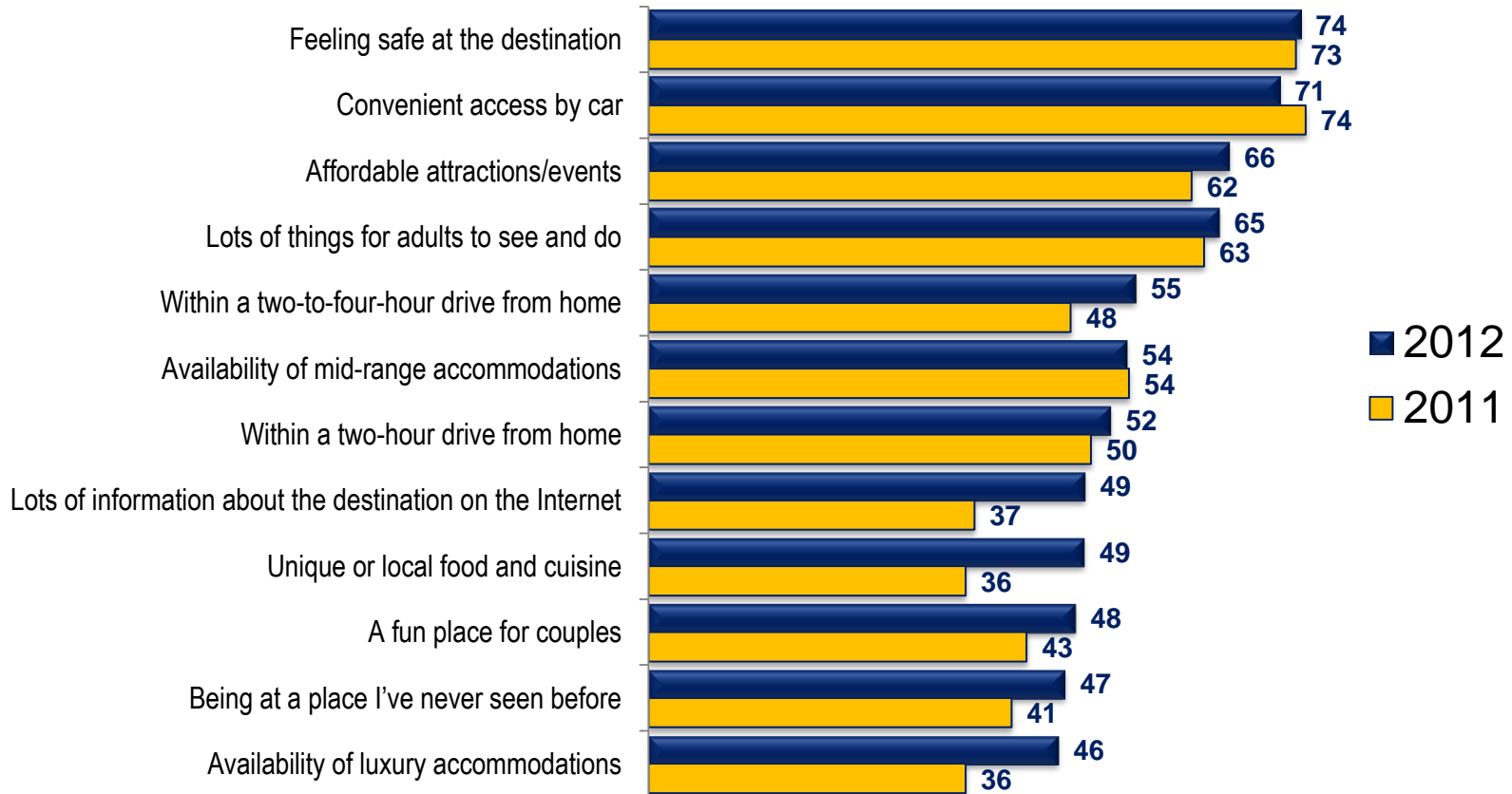
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Pocono Mountains



Base: Overnight Trips

% Rating Factor As Very Important\*



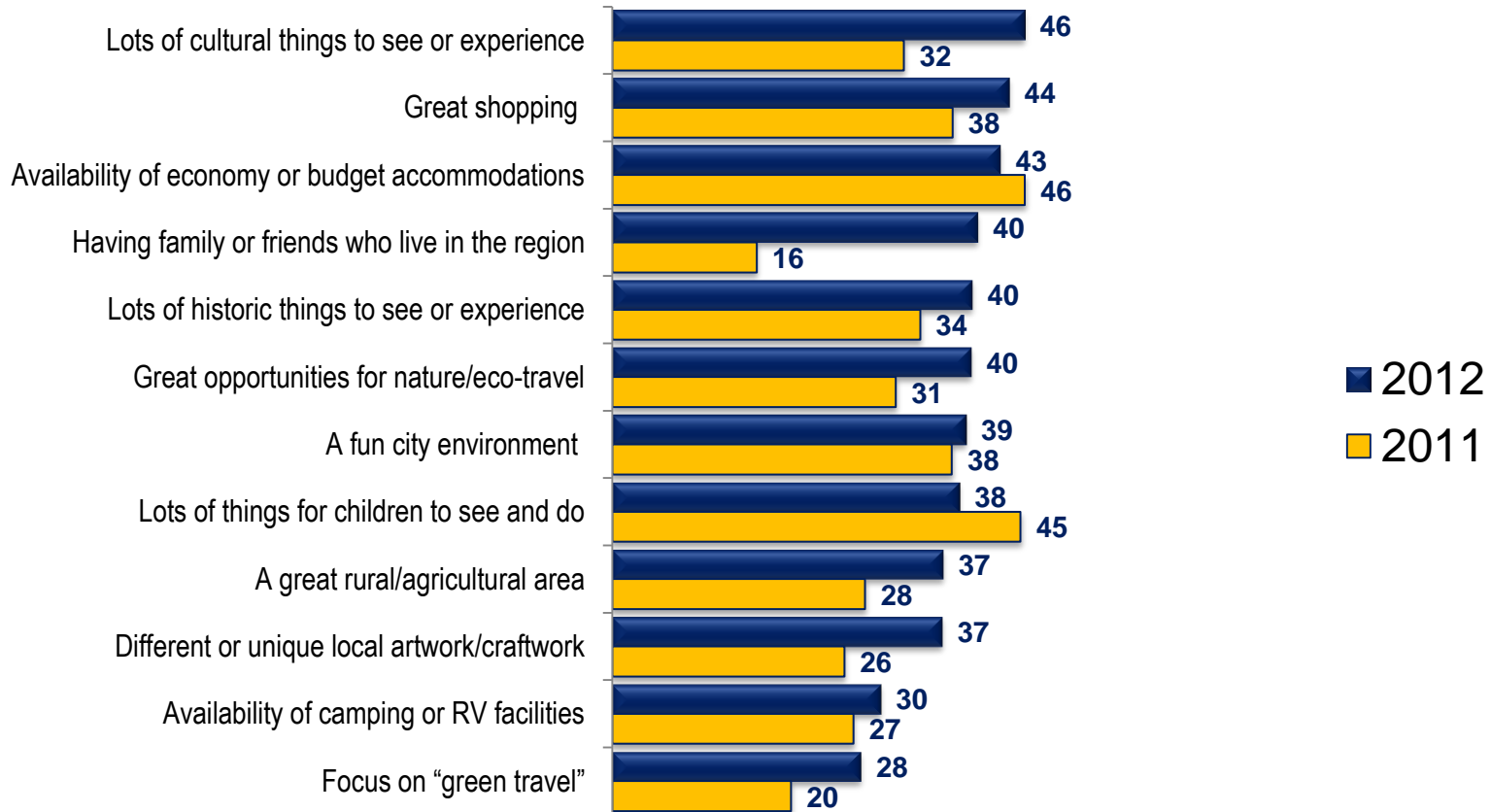
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



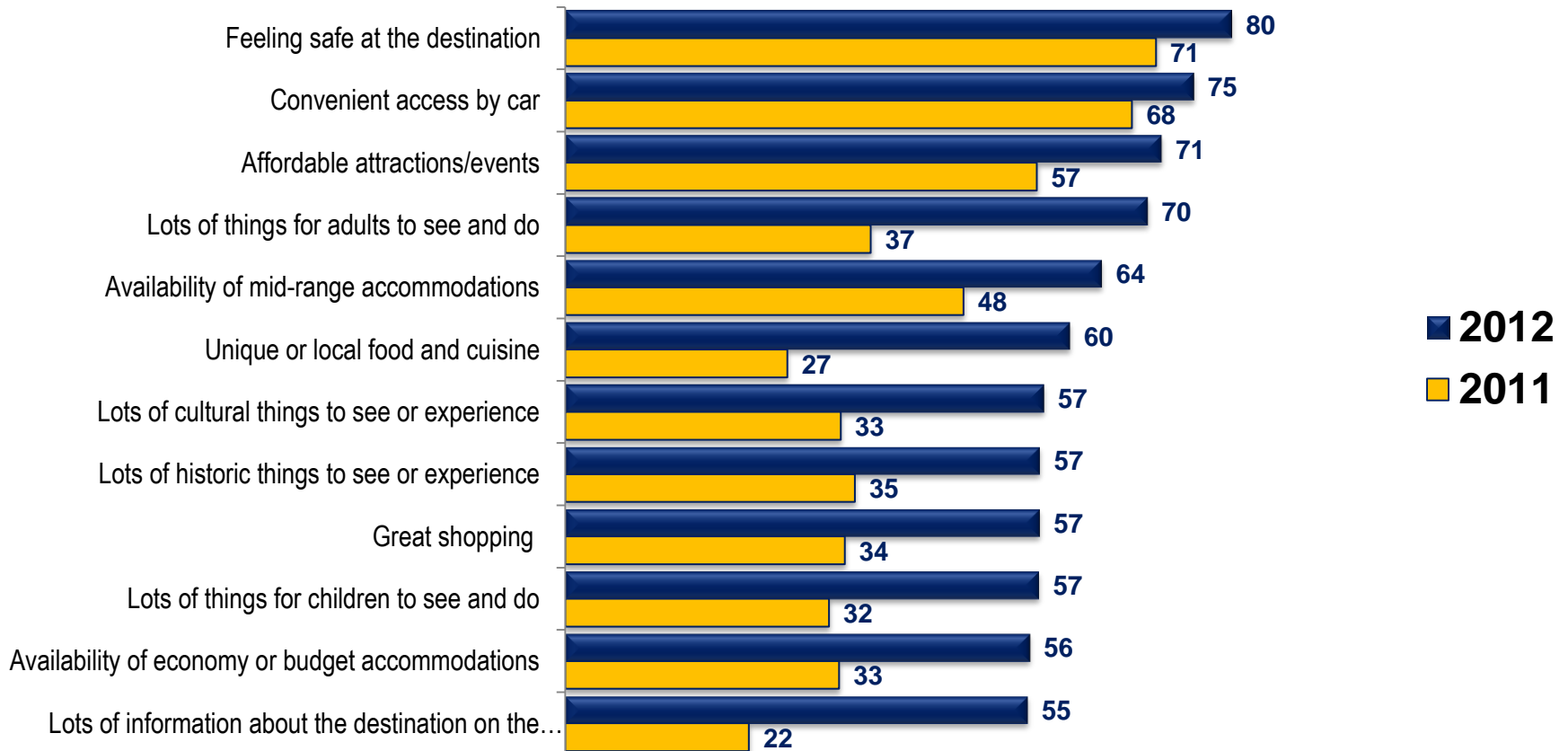
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Dutch Country Roads



Base: Overnight Trips

% Rating Factor As Very Important\*



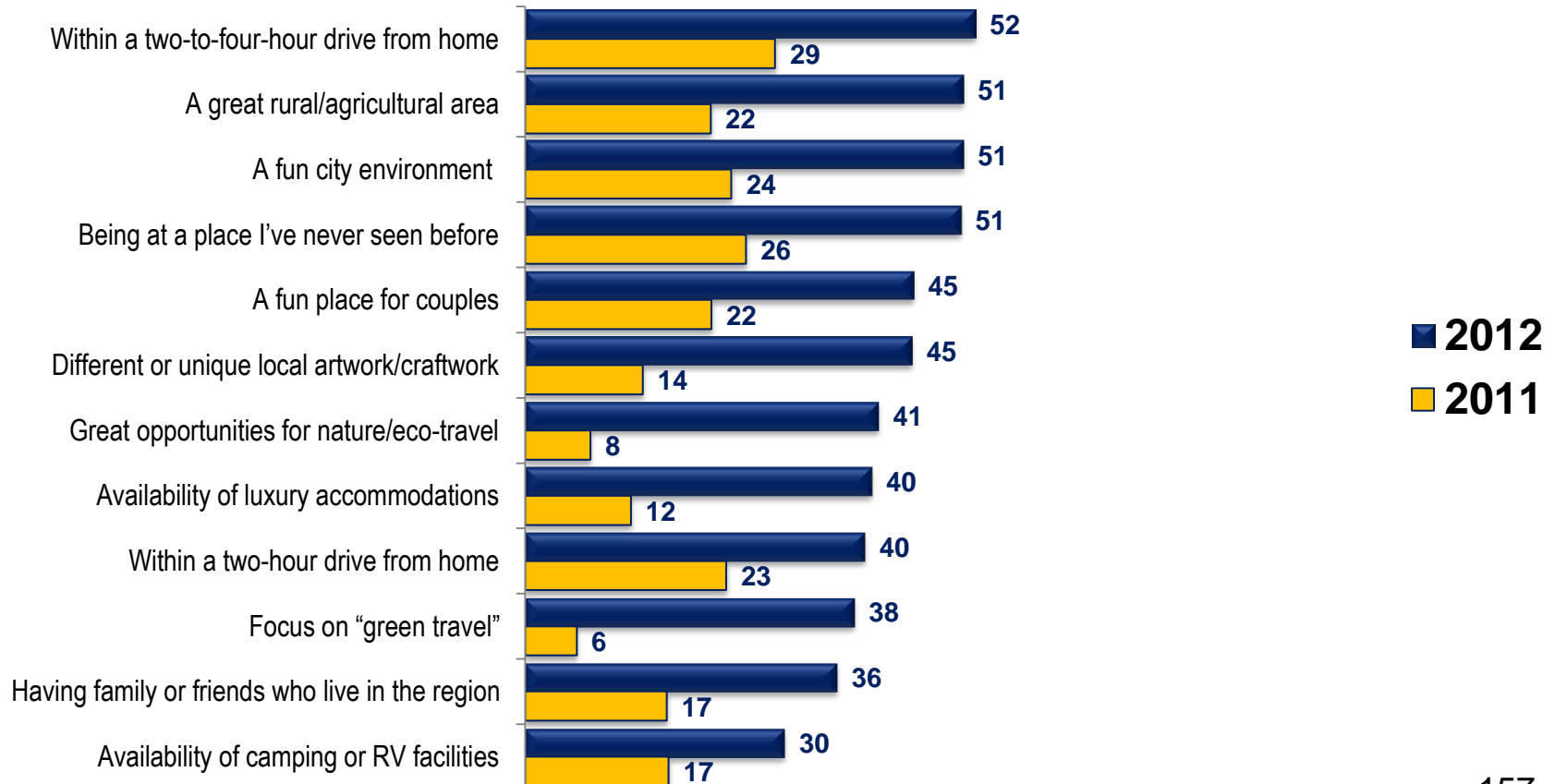
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



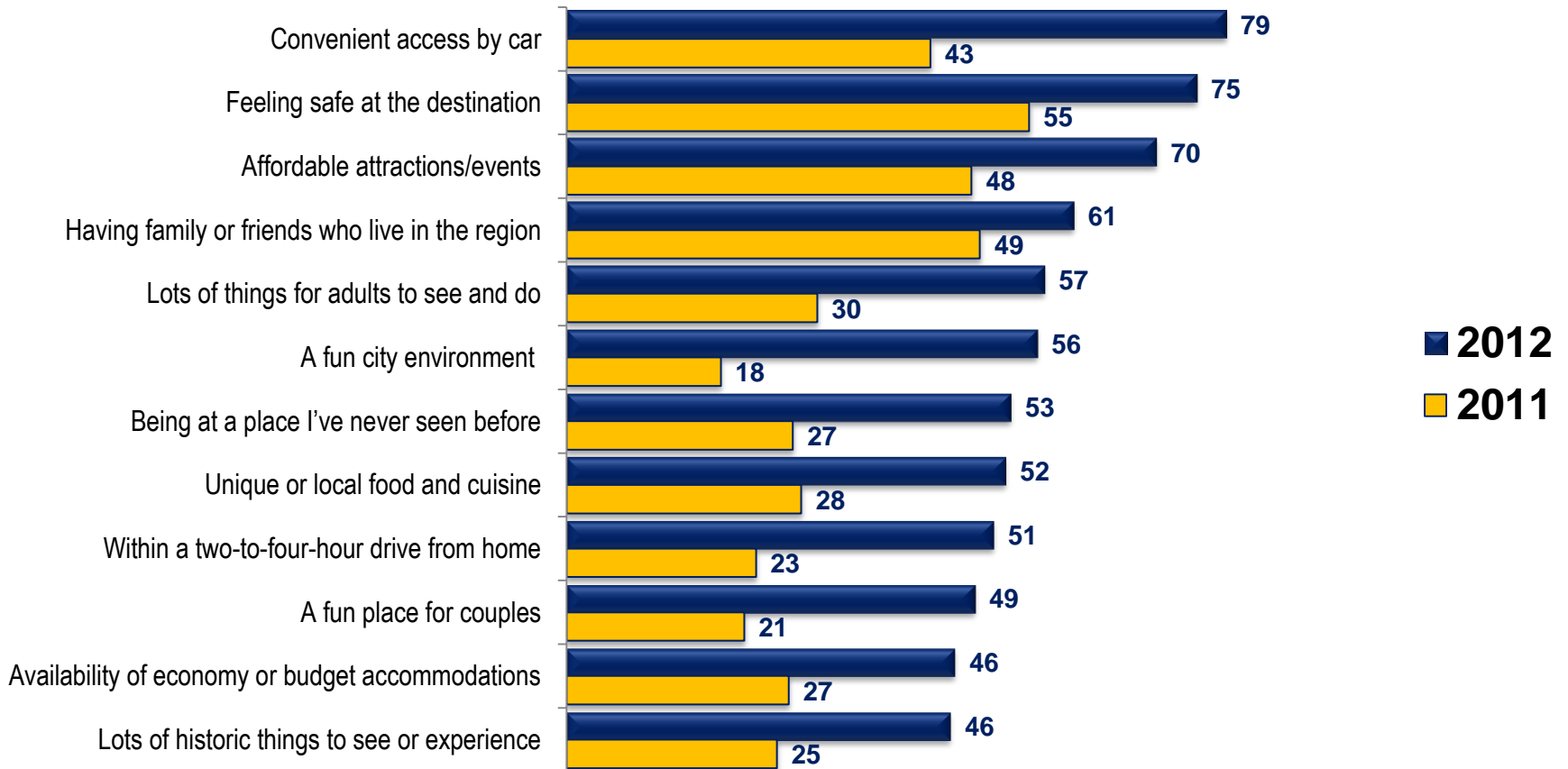
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Lehigh Valley



Base: Overnight Trips

% Rating Factor As Very Important\*



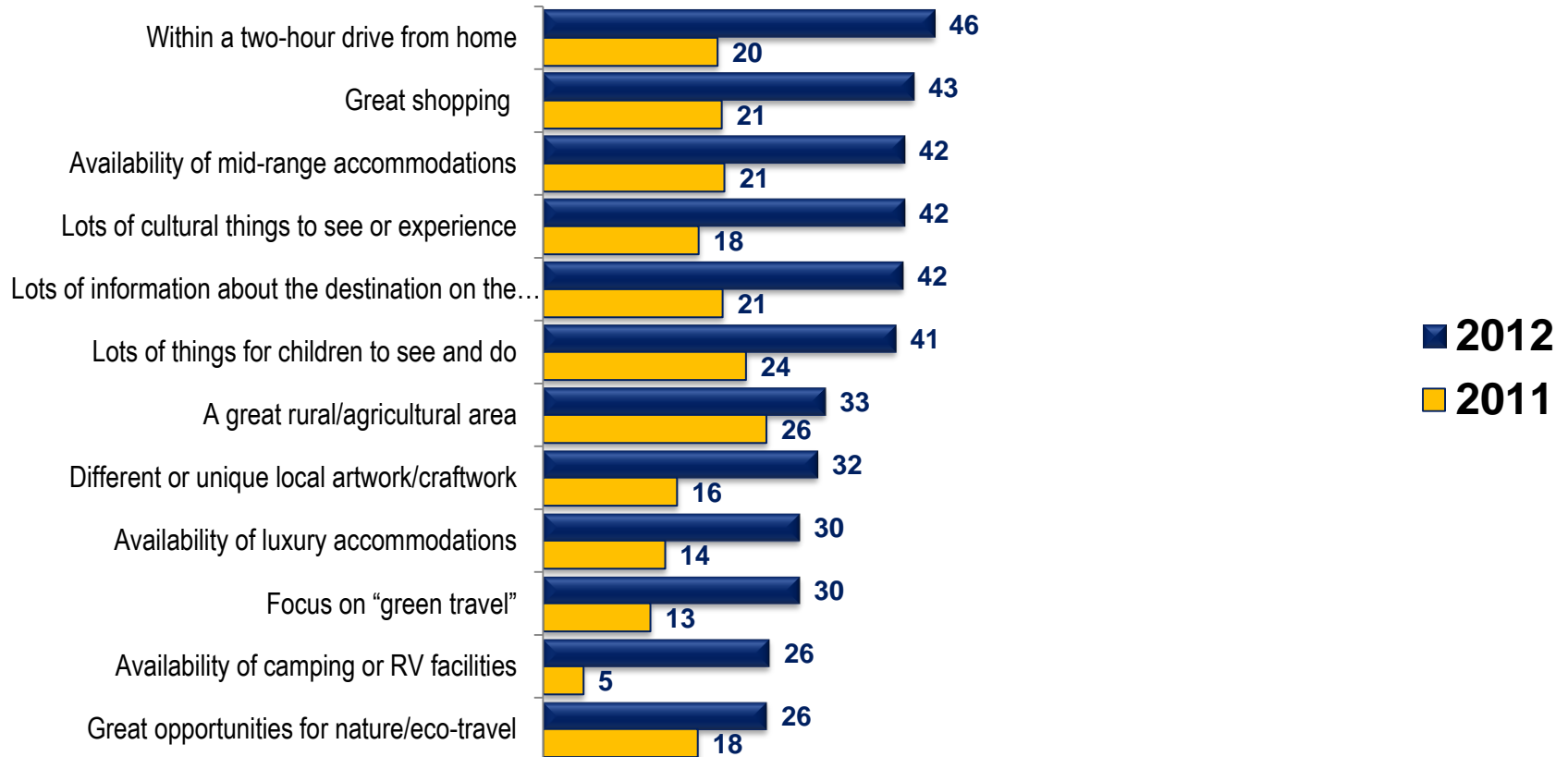
\* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Trips

% Rating Factor As Very Important\*



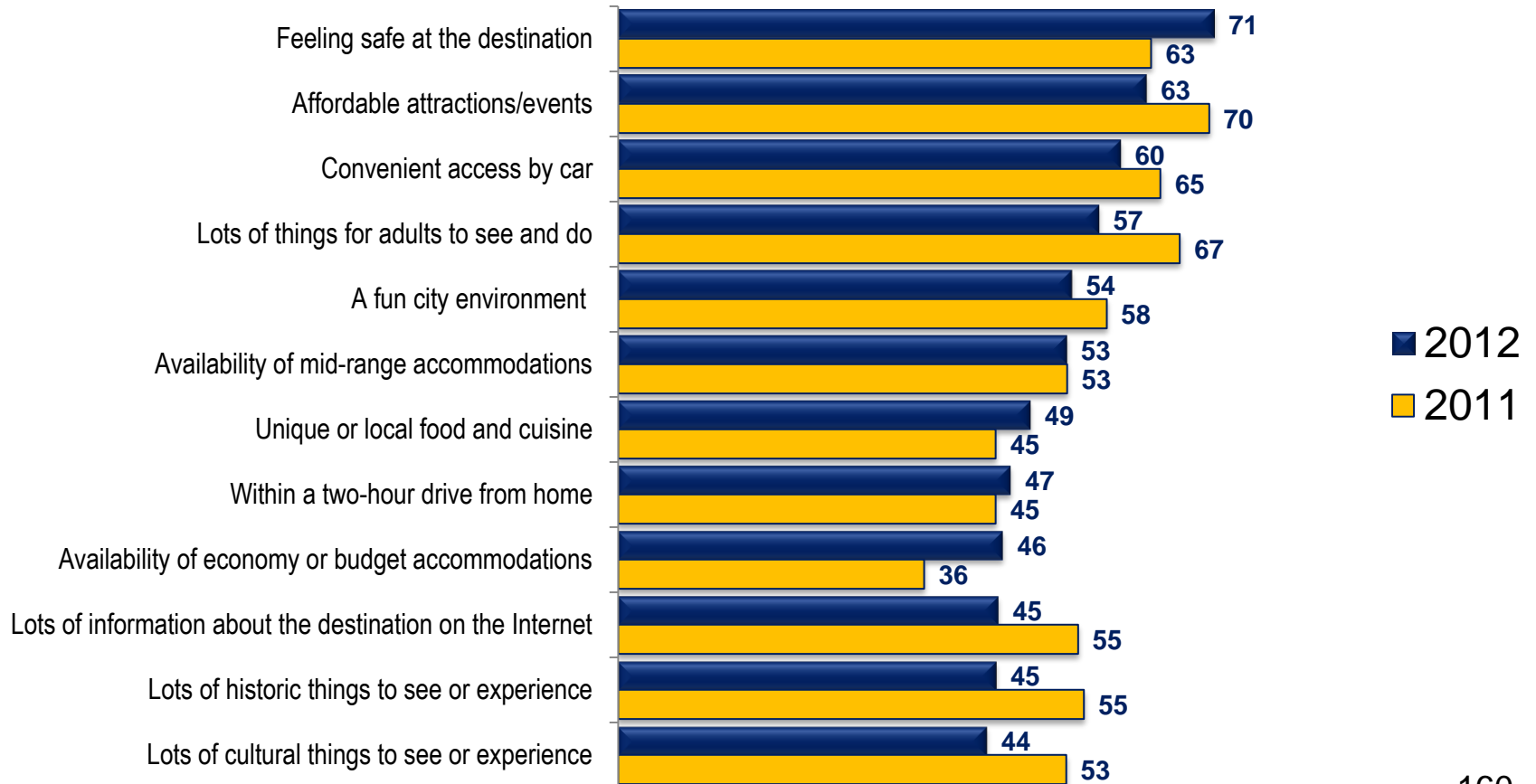
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Importance of Factors In Choosing to Visit Philadelphia & The Countryside



Base: Overnight Trips

% Rating Factor As Very Important\*



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

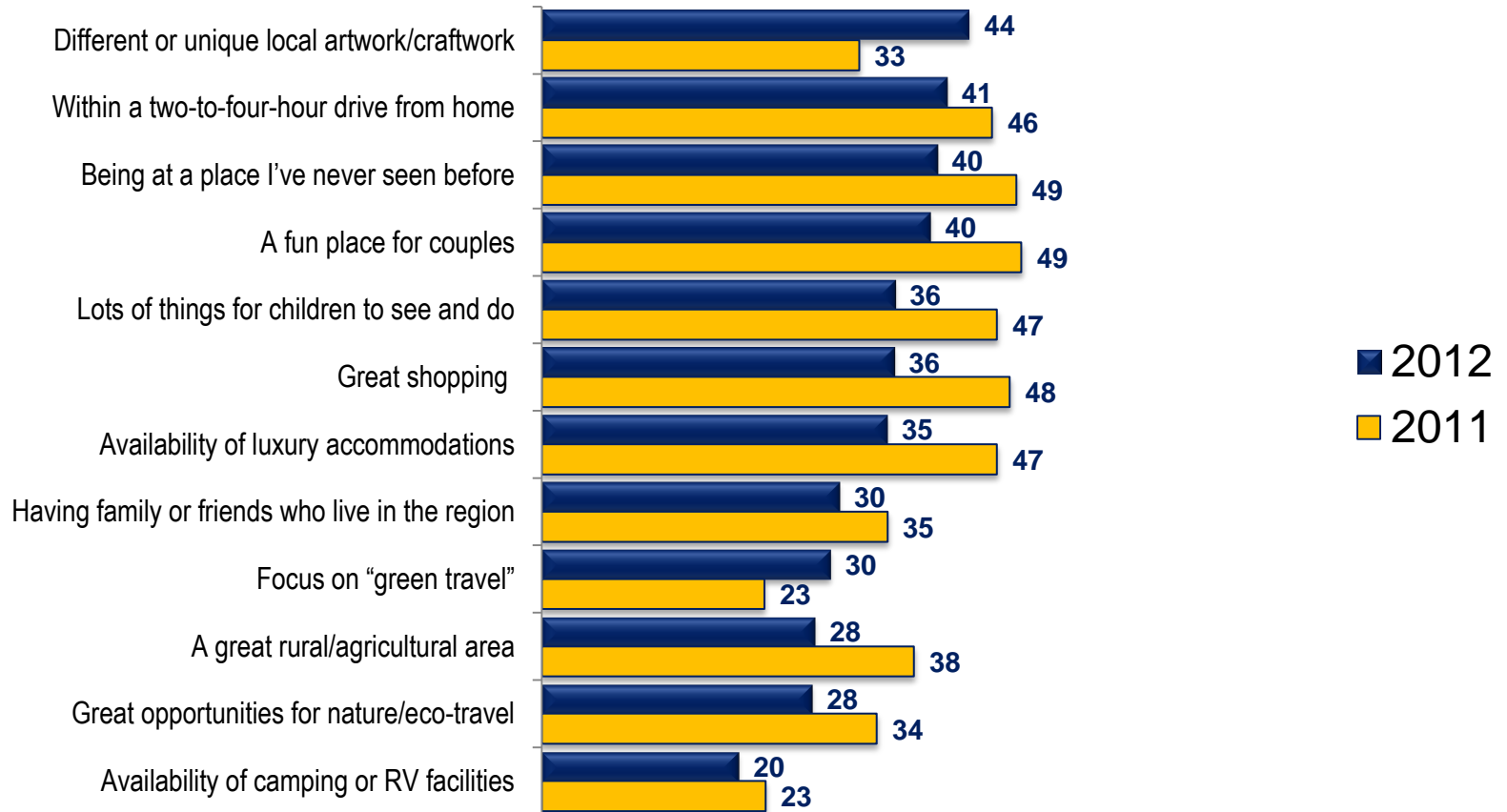


# Importance of Factors In Choosing to Visit Philadelphia & The Countryside (cont'd)



Base: Overnight Trips

% Rating Factor As Very Important\*



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

**Product Delivery —  
Marketable Overnight Trips**

# Traveler Priorities

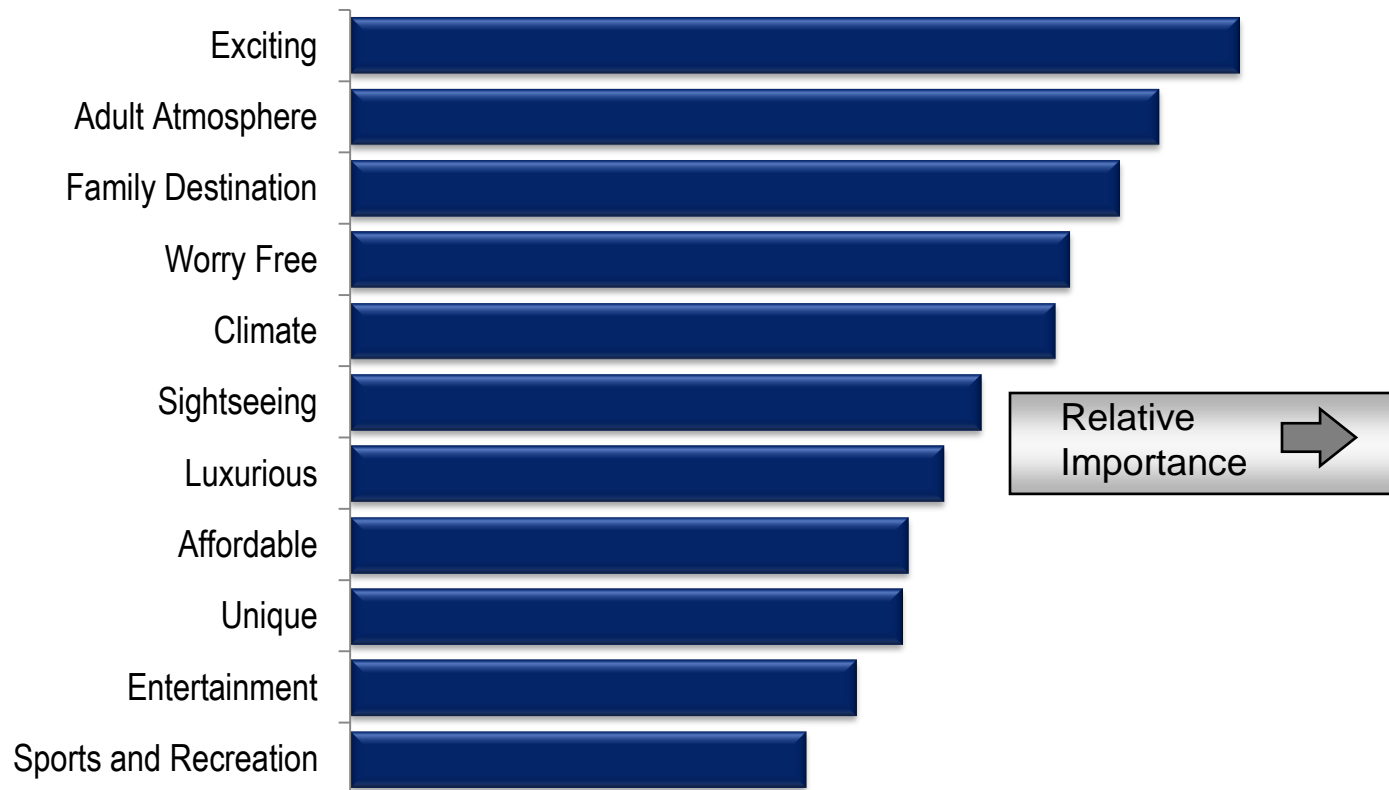


- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- The degree of association between each factor was then measured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

# Traveler Priorities



Base: Overnight Marketable Trips



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

# Hot Buttons



**1 A fun place for a vacation/getaway**

**2 Exciting destination**

**3 Good for adult vacation/getaway**

**4 Lots to see and do**

**5 A good place for couples to visit**

**6 Good place for families to visit**

**7 Must-see destination**

**8 Truly beautiful scenery**

**9 A place I would feel welcome**

**10 Good place to get away and relax**

**11 A fun place for kids**

**12 Great place for walking/strolling about**

**13 Great shopping**

**14 Interesting cities**

**15 A place welcoming for children**

**16 Warm/friendly people**

# Product Delivery



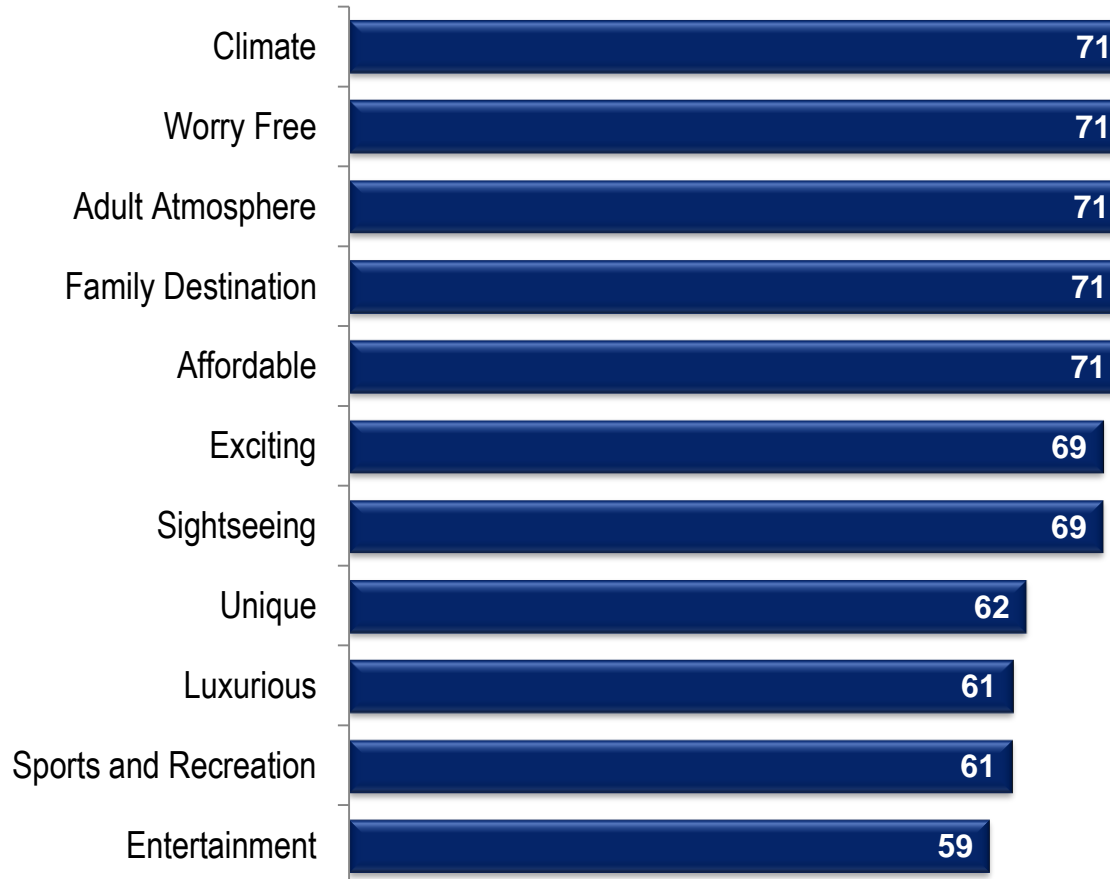
- ◉ Image ratings by recent visitors can be viewed as product ratings such that the recent visitor is, presumably, rating Pennsylvania from his/her experience.
- ◉ Pennsylvania image's strengths among recent visitors include well-known landmarks, lots of things to see and do, and being a fun place for a vacation. Also, its proximity to visitors and family friendly atmosphere are among Pennsylvania's strengths.

# Pennsylvania's Product Delivery



Base: Overnight Marketable Trips

## *Percent Who Strongly Agree*

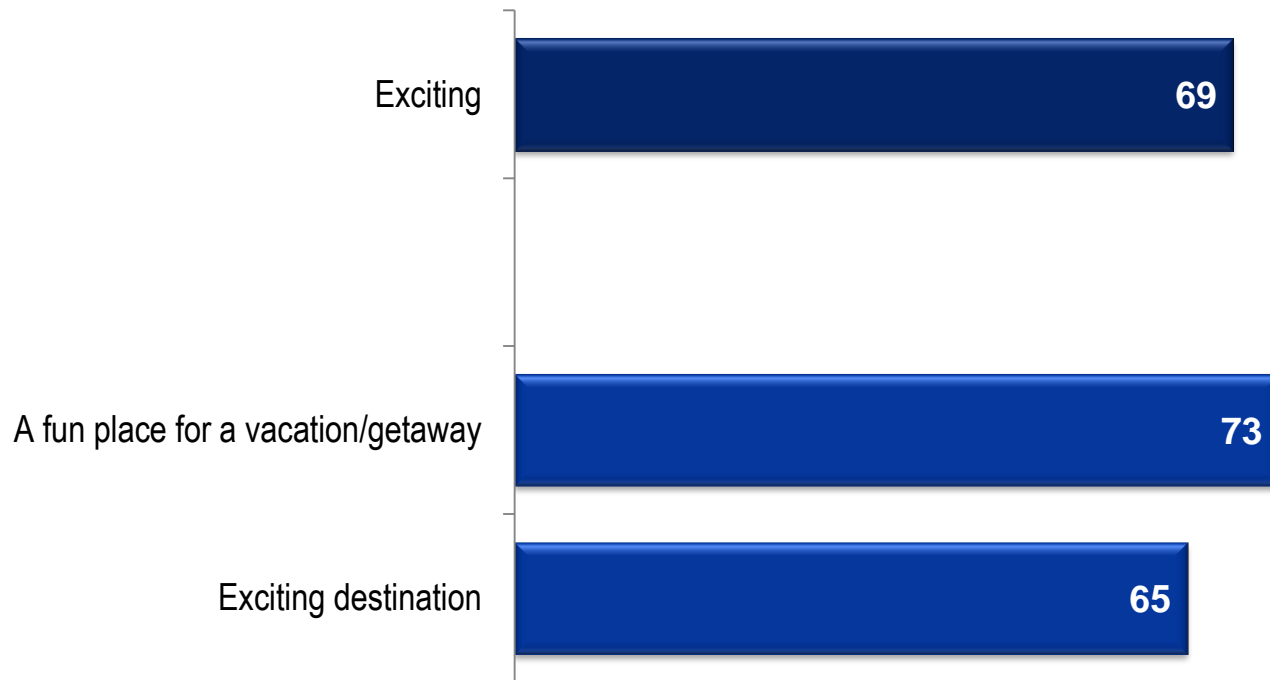


# Pennsylvania's Product Delivery — Exciting



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



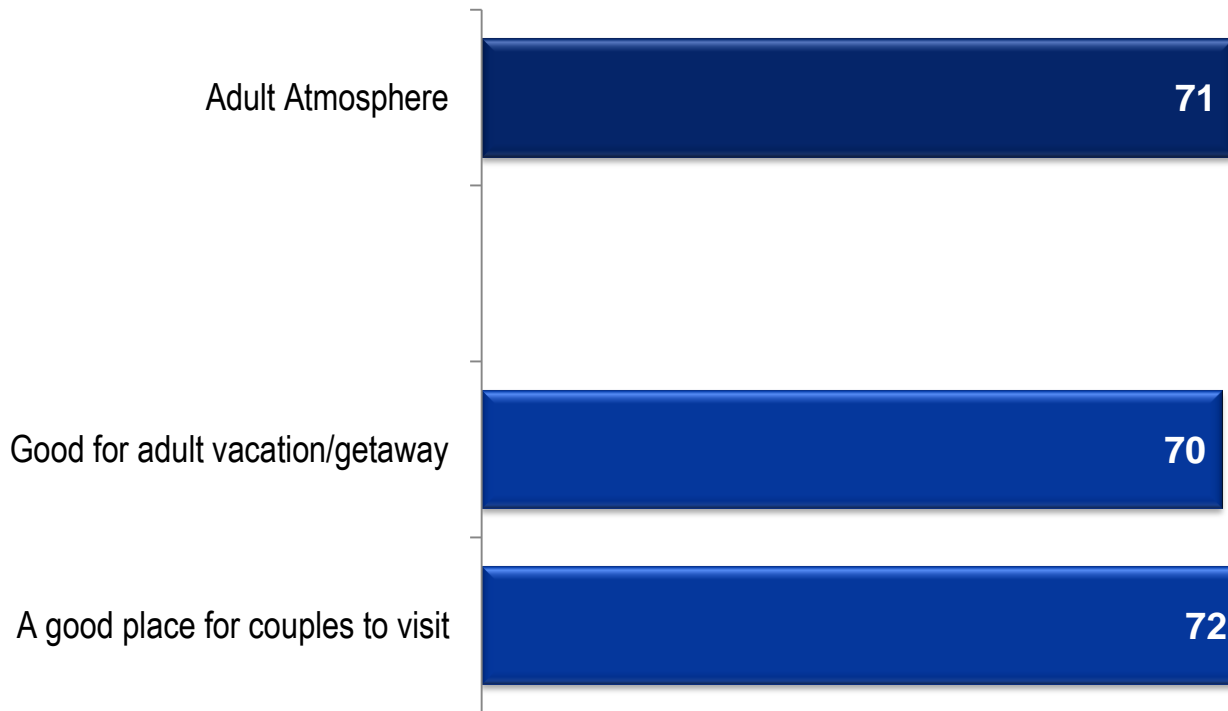


# Pennsylvania's Product Delivery — Adult Atmosphere



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*

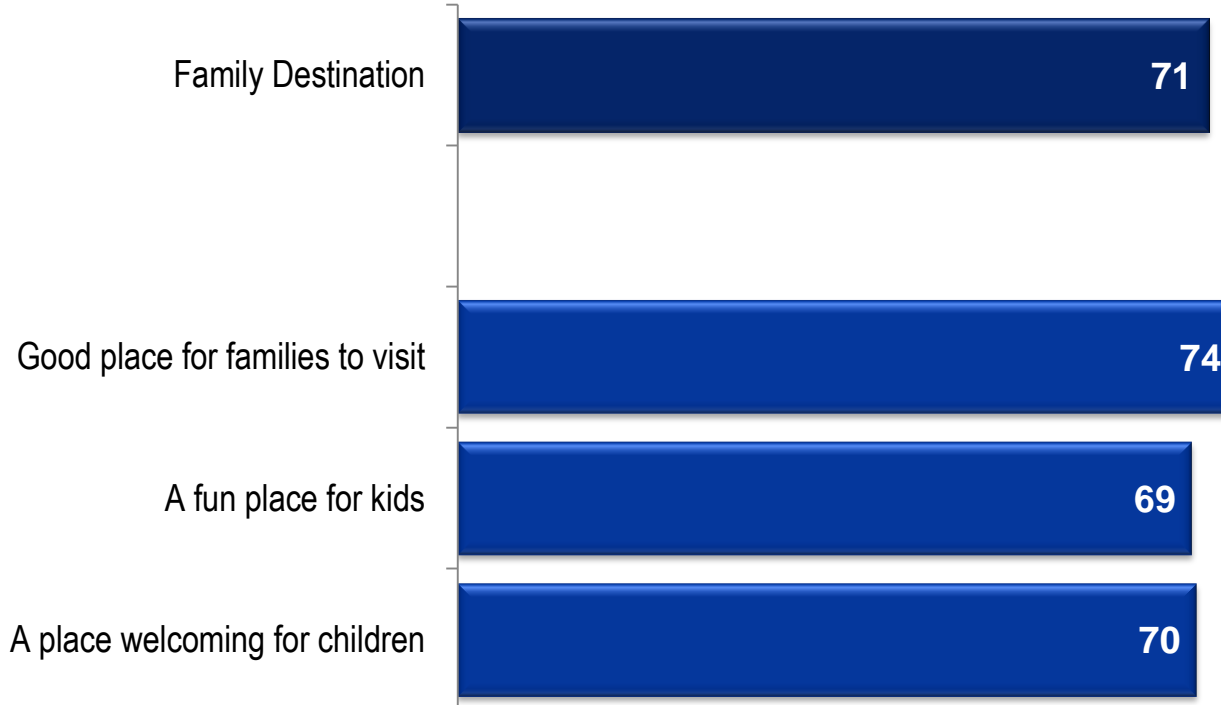


# Pennsylvania's Product Delivery — Family Destination



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Worry Free



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*

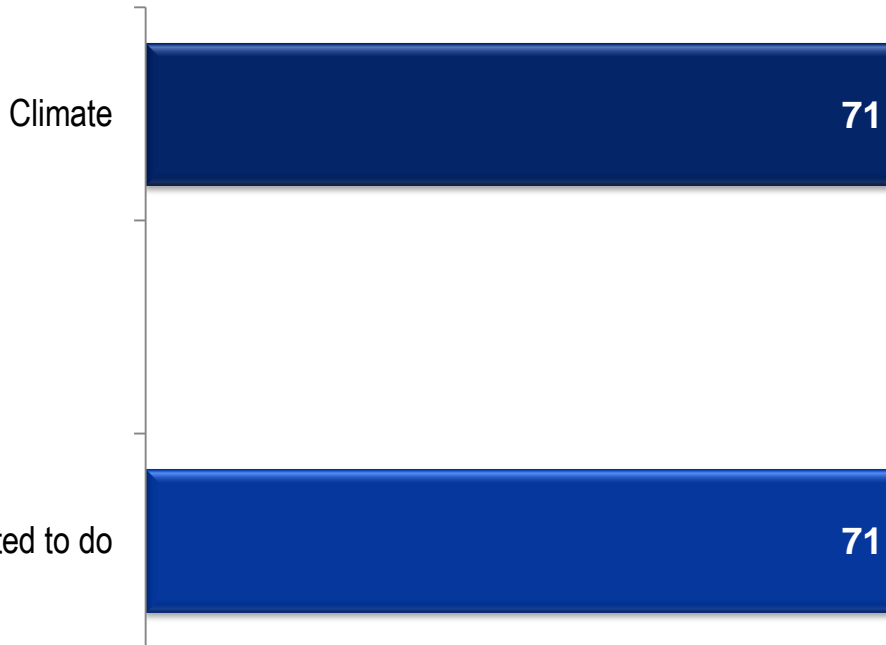


# Pennsylvania's Product Delivery — Climate



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



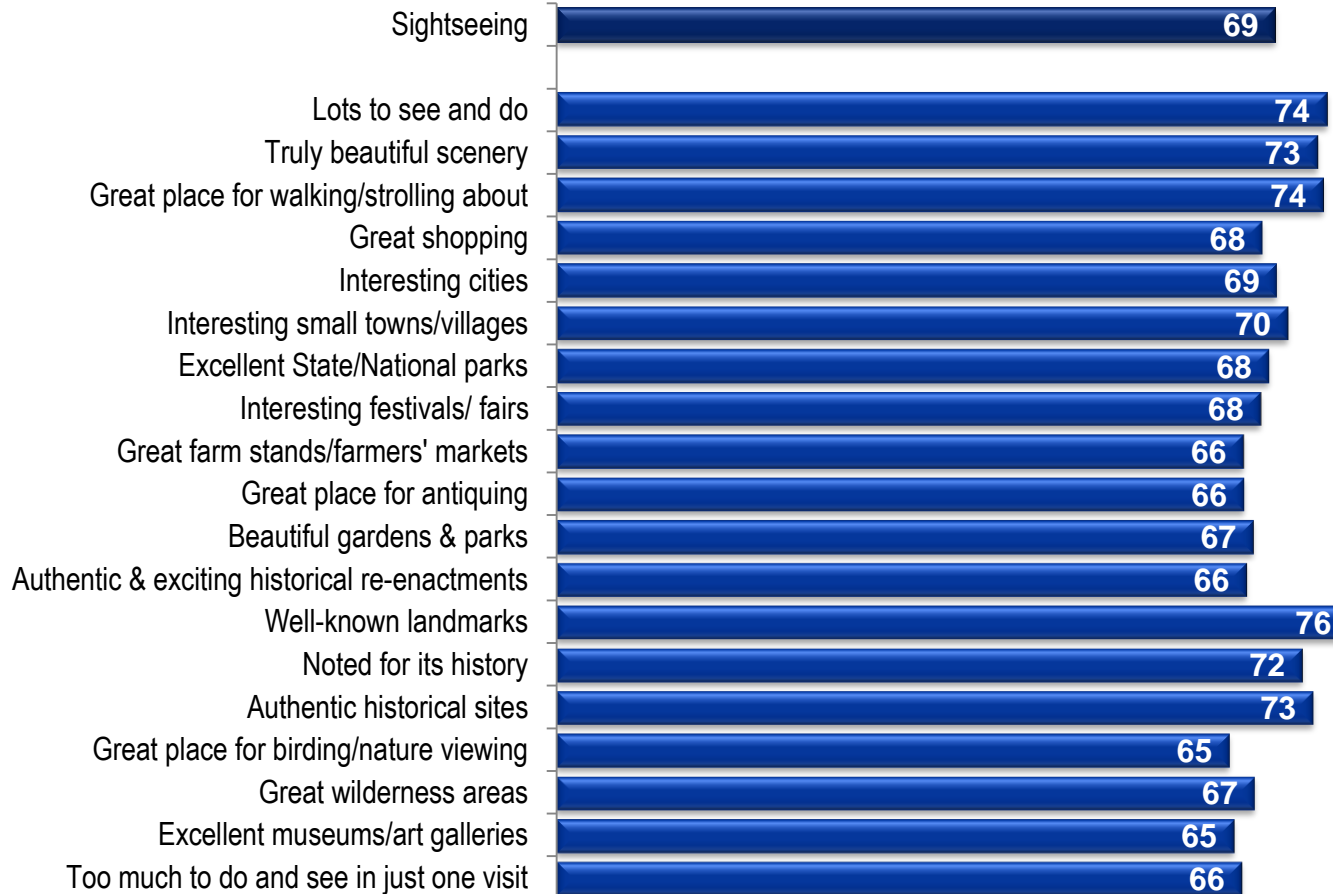
Climate was perfect for what we wanted to do

# Pennsylvania's Product Delivery — Sightseeing



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*

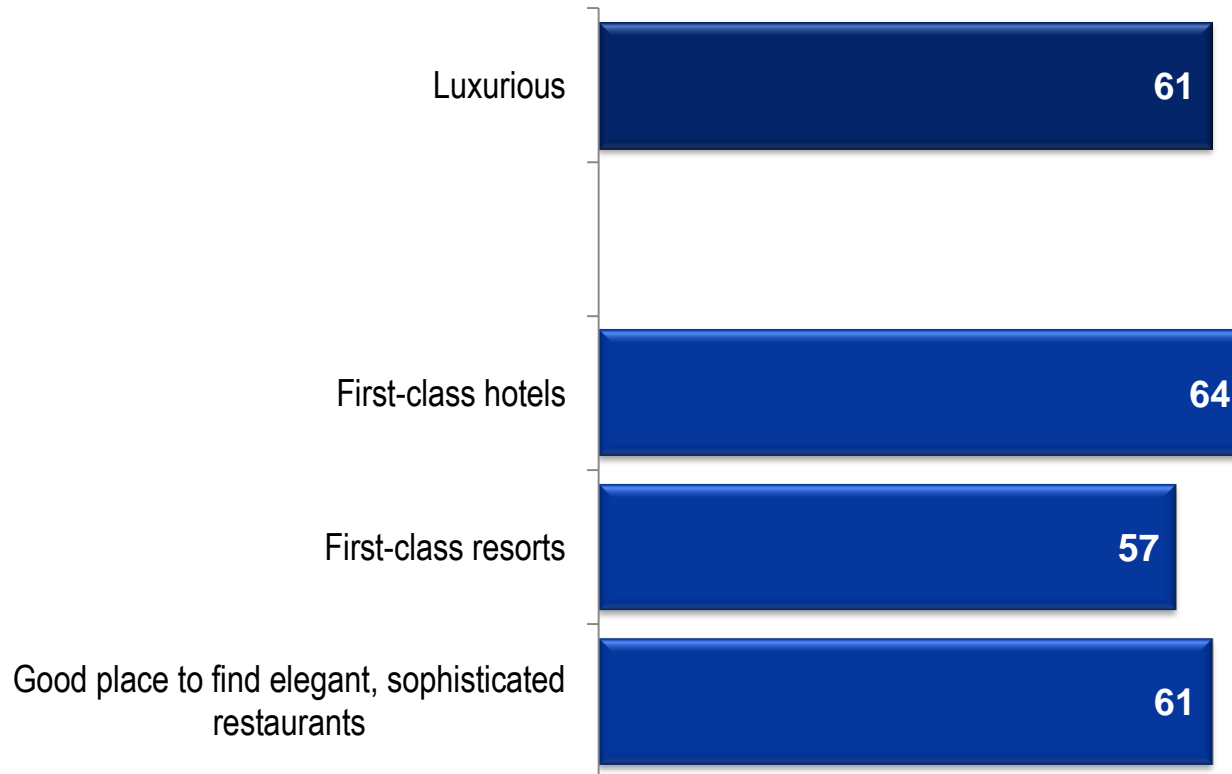


# Pennsylvania's Product Delivery — Luxurious



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Affordable



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*

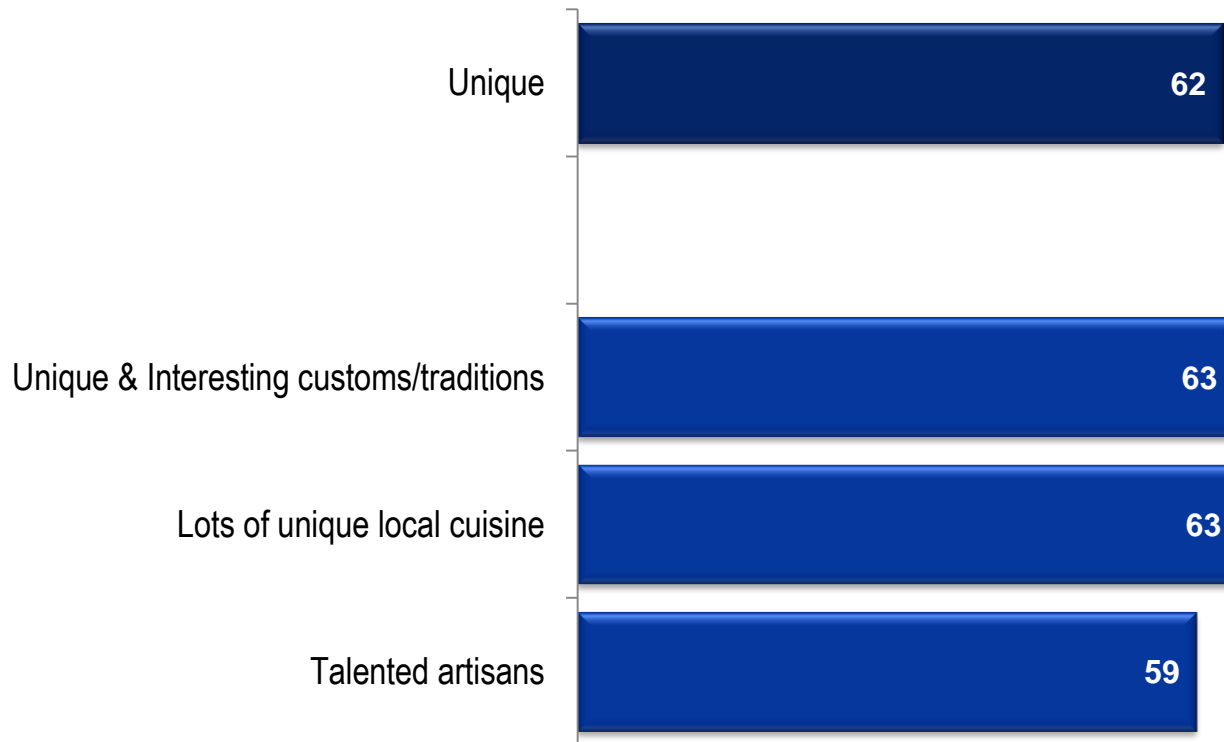


# Pennsylvania's Product Delivery — Unique



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



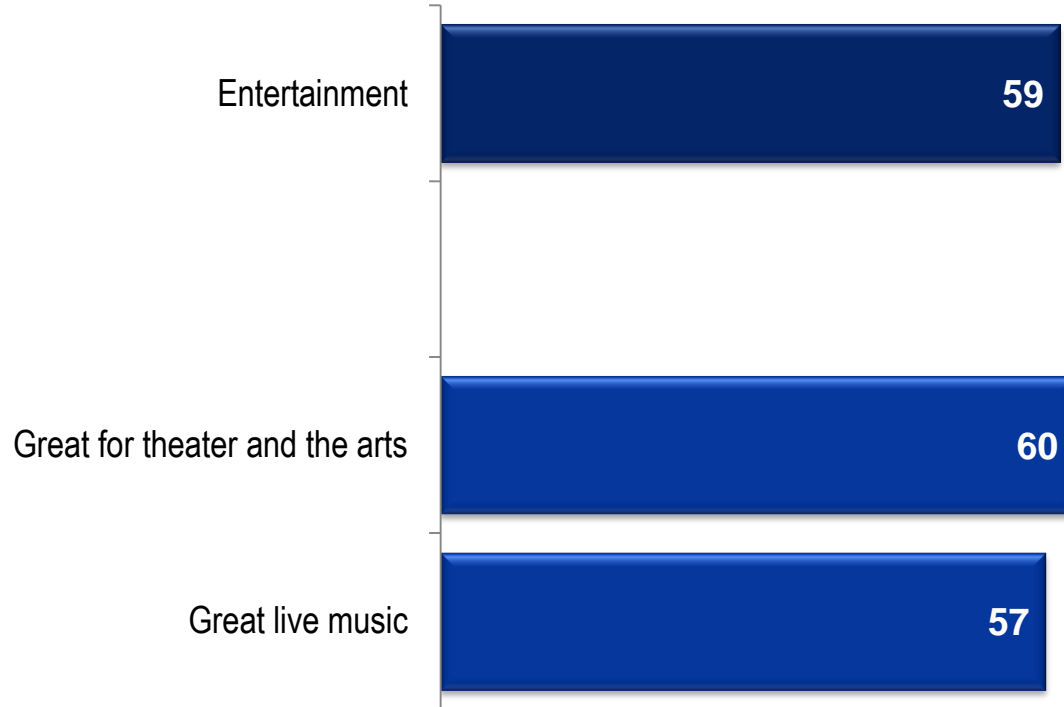


# Pennsylvania's Product Delivery — Entertainment



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Sports & Recreation



Base: Overnight Marketable Trips

## *Percent Who Strongly Agree*



# Pennsylvania's Top 20 Image Attributes



Base: Overnight Marketable Trips

## *Percent Who Strongly Agree*



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



Base: Overnight Marketable Trips

*Percent Who Strongly Agree*



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



Base: Overnight Marketable Trips

*Percent who strongly agree*

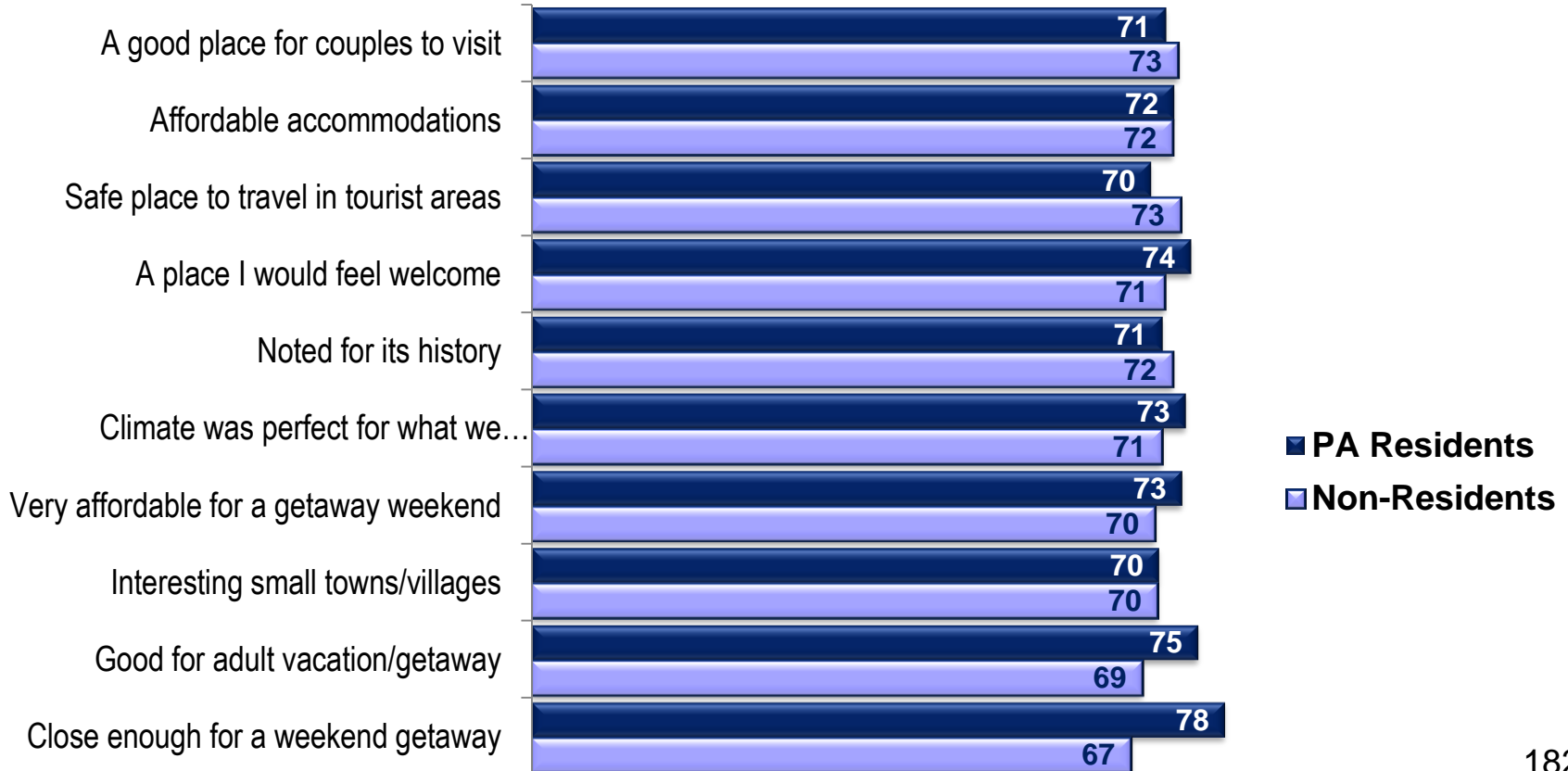


# Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents (cont'd)



Base: Overnight Marketable Trips

*Percent who strongly agree*

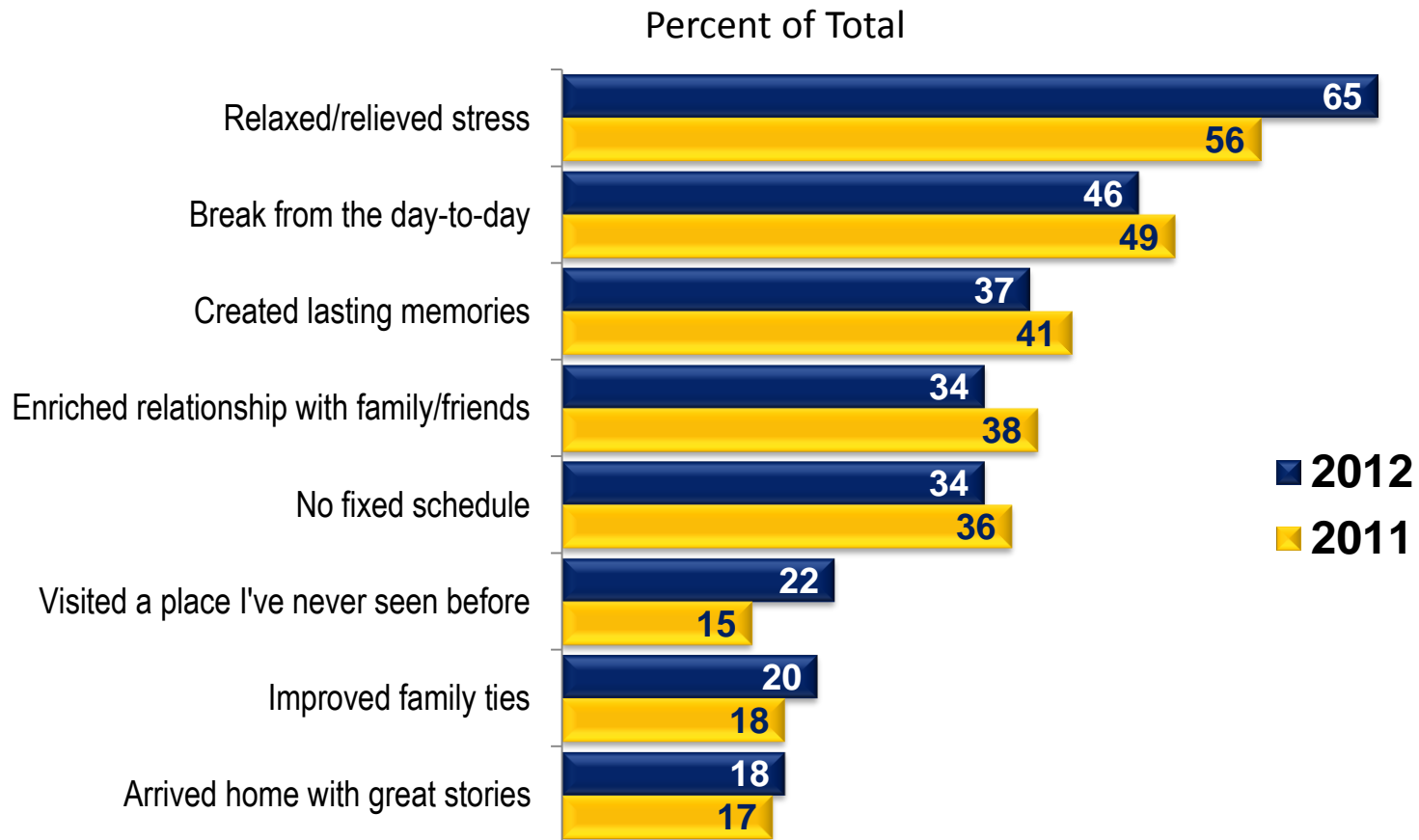


# **Trip Benefits — Marketable Overnight Trips**

# Benefits From Pennsylvania Overnight Trip



Base: Overnight Marketable Trips

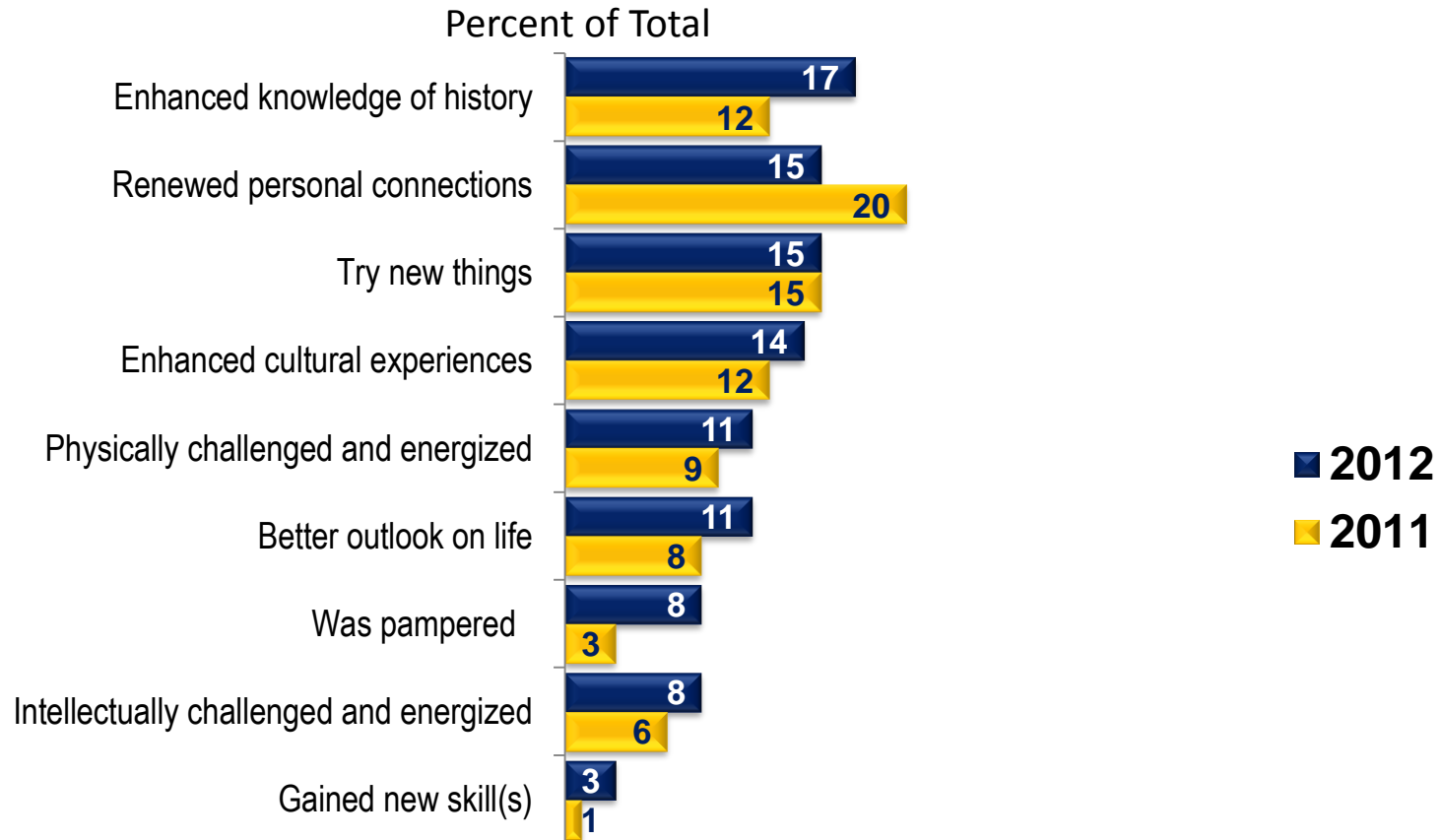




# Benefits From Pennsylvania Overnight Trip (cont'd)



Base: Overnight Marketable Trips



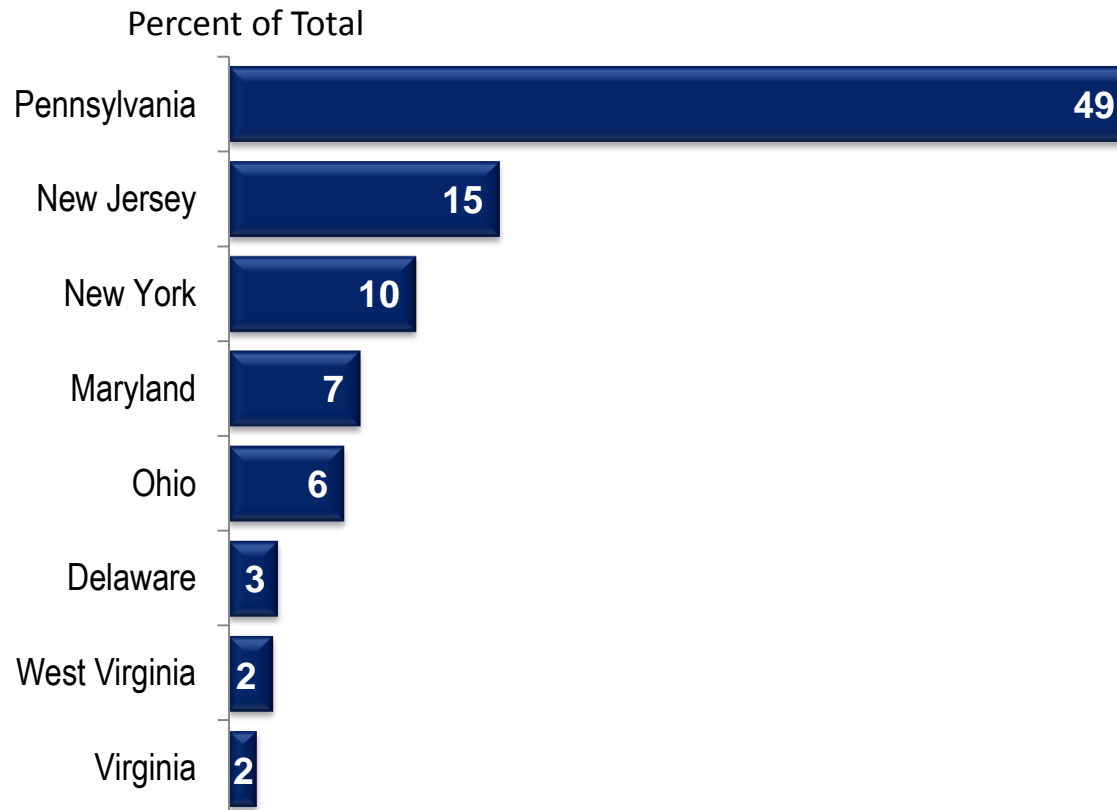
# **Pennsylvania Day-Trips**

# Origin Markets — Pennsylvania Day-Trips

# State Origin Markets – Marketable Day-Trips



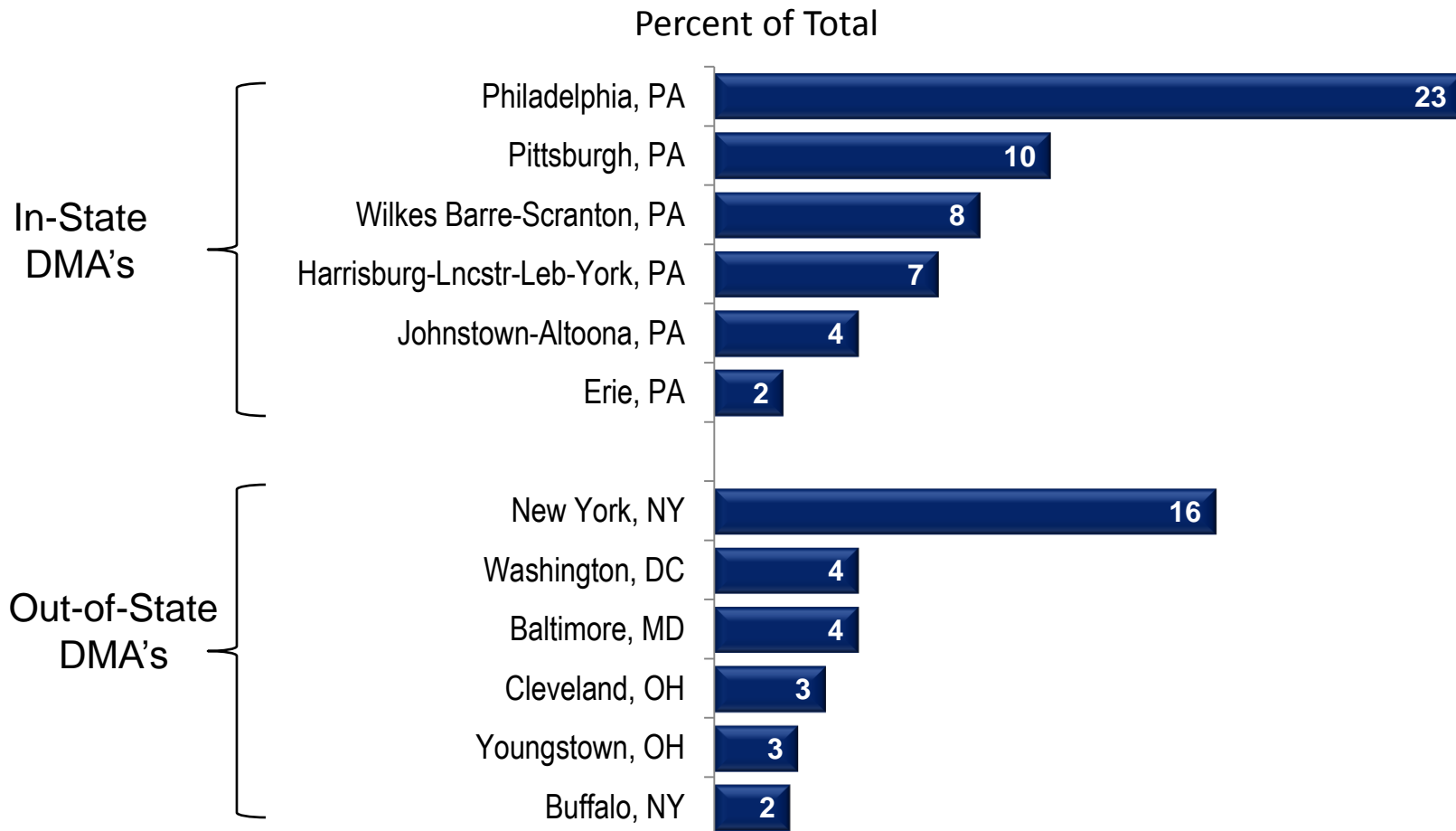
Base: Marketable Day-Trips



# Urban Origin Markets – Marketable Day-Trips



Base: Marketable Day-Trips

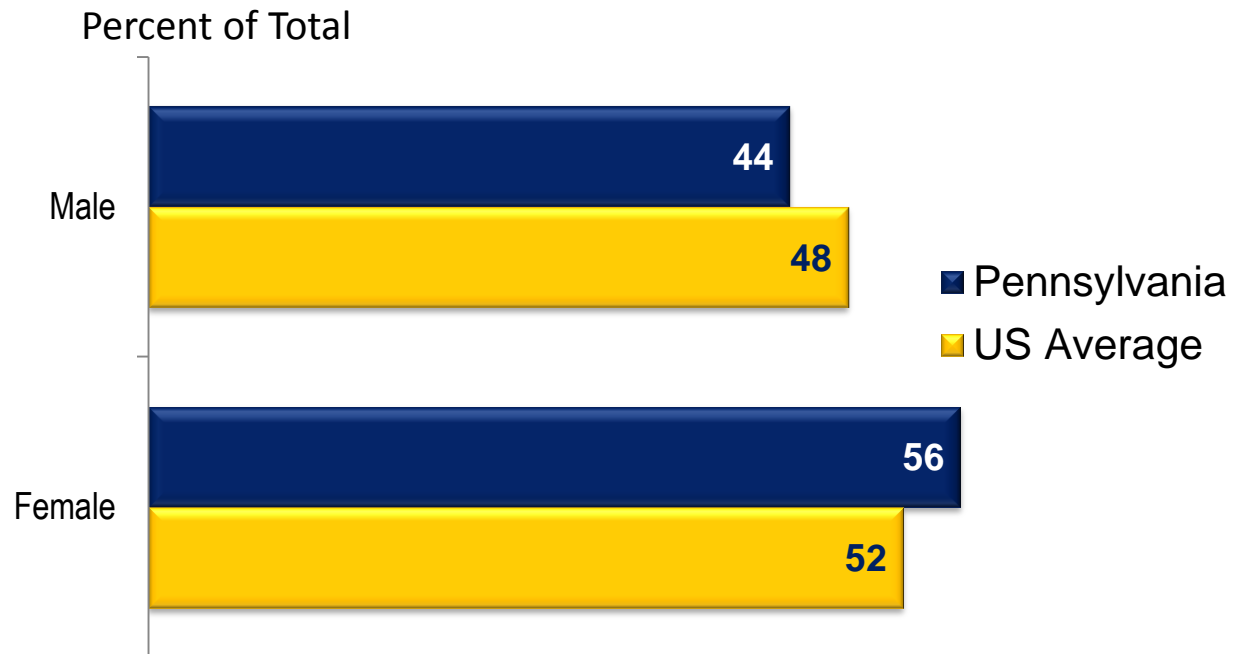


# **Traveler Profile — Marketable Day-Trips**

# Gender



Base: Marketable Day-Trips

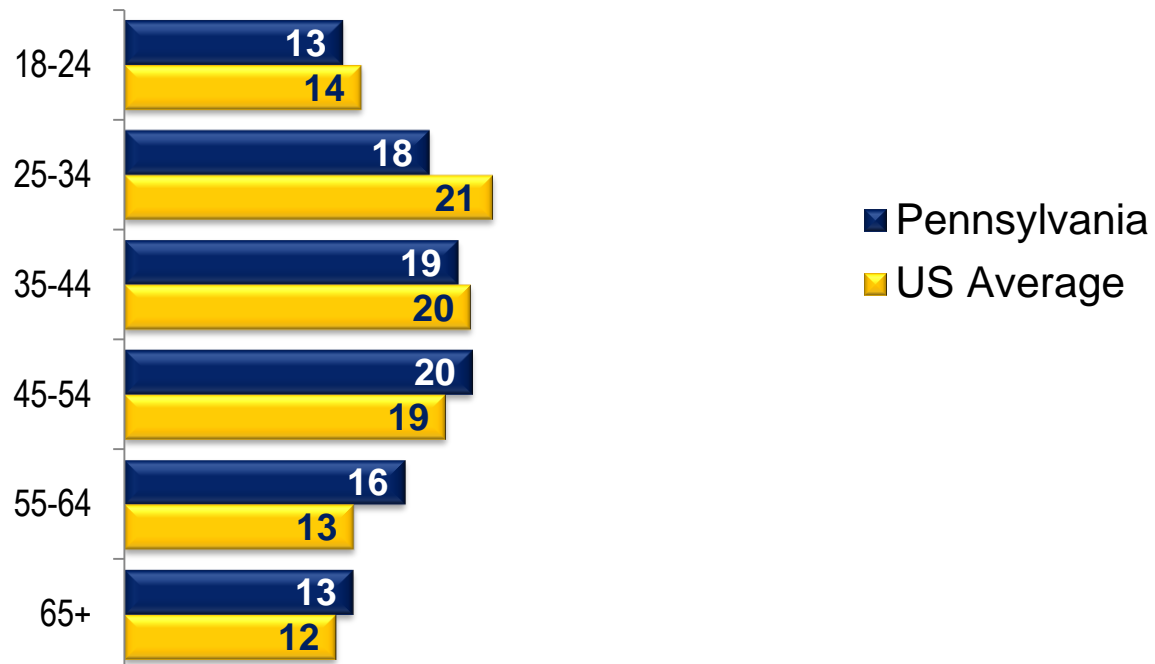


# Age



Base: Marketable Day-Trips

Percent of Total



■ Pennsylvania  
■ US Average

Pennsylvania

US Average

Average Age

45.1

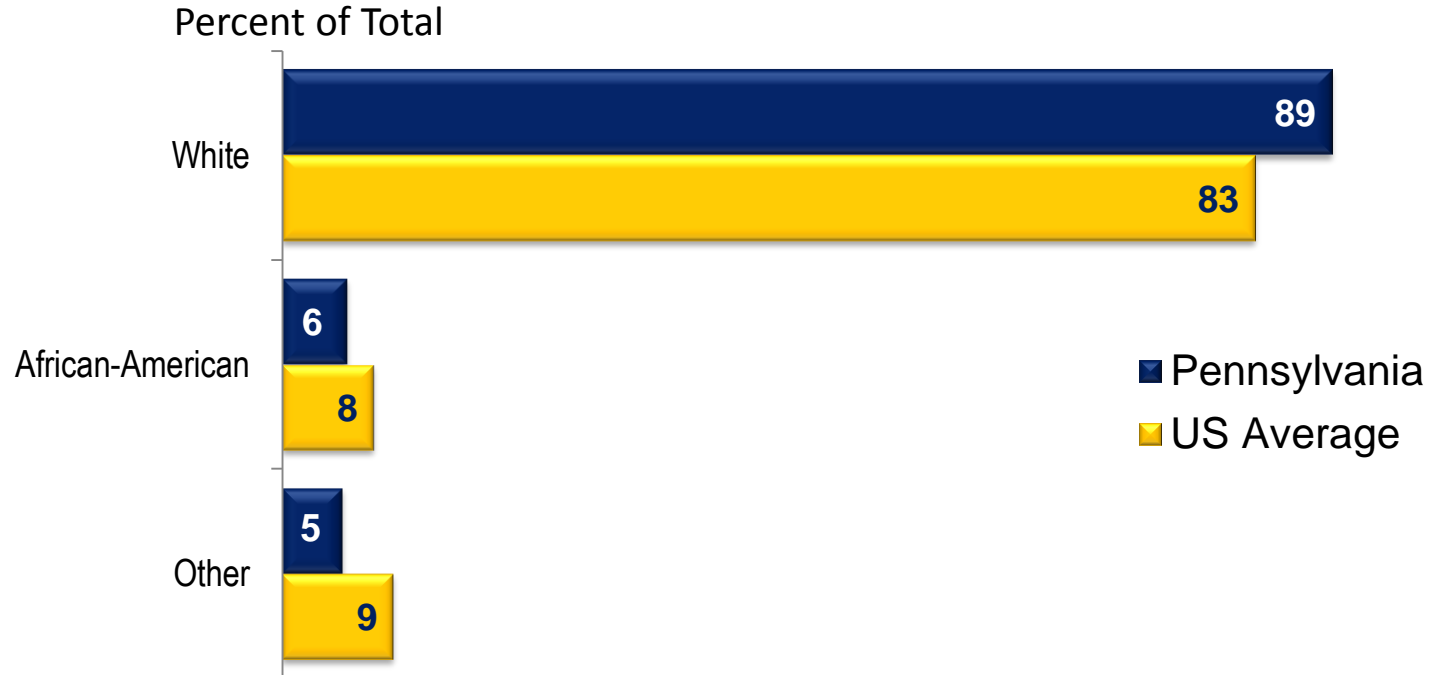
43.5



# Race



Base: Marketable Day-Trips



# Hispanic Background



Base: Marketable Day-Trips

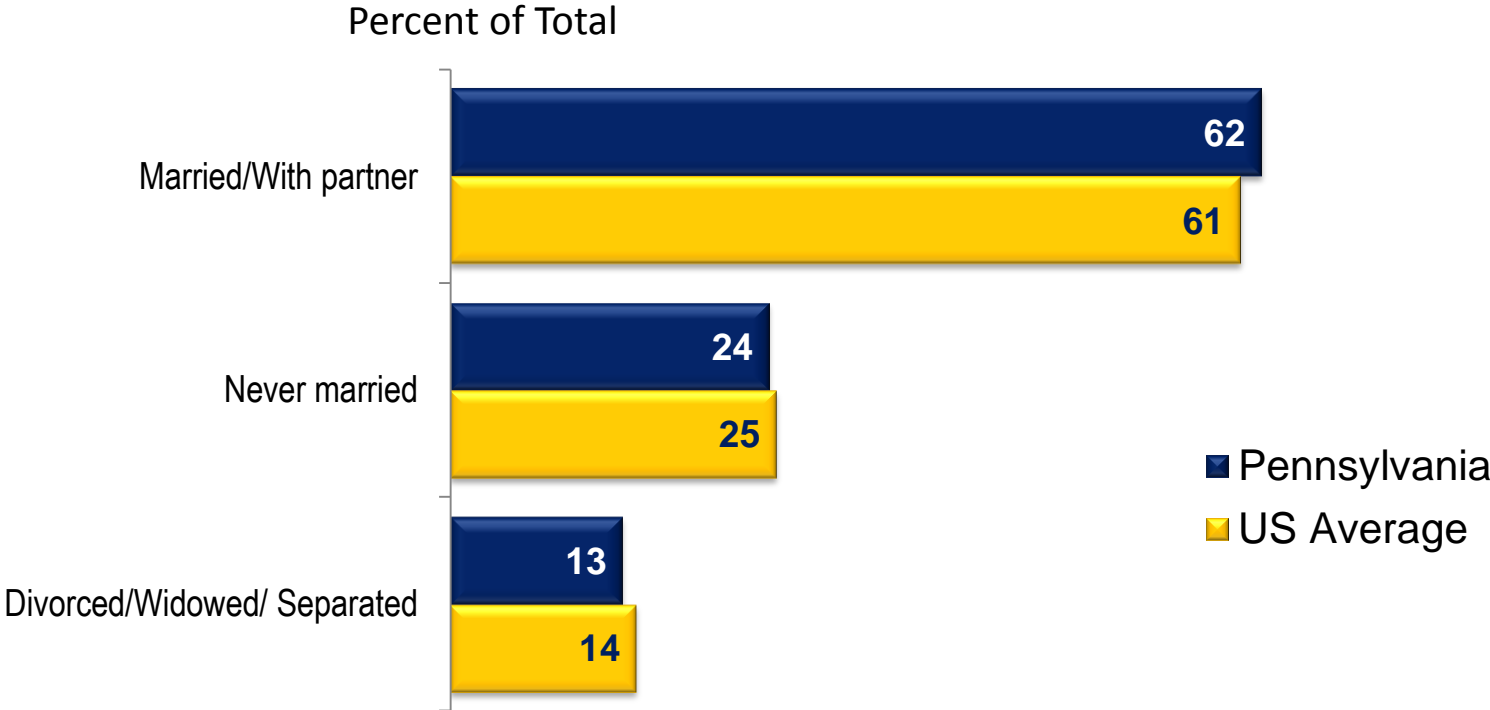
Percent of Total



# Marital Status



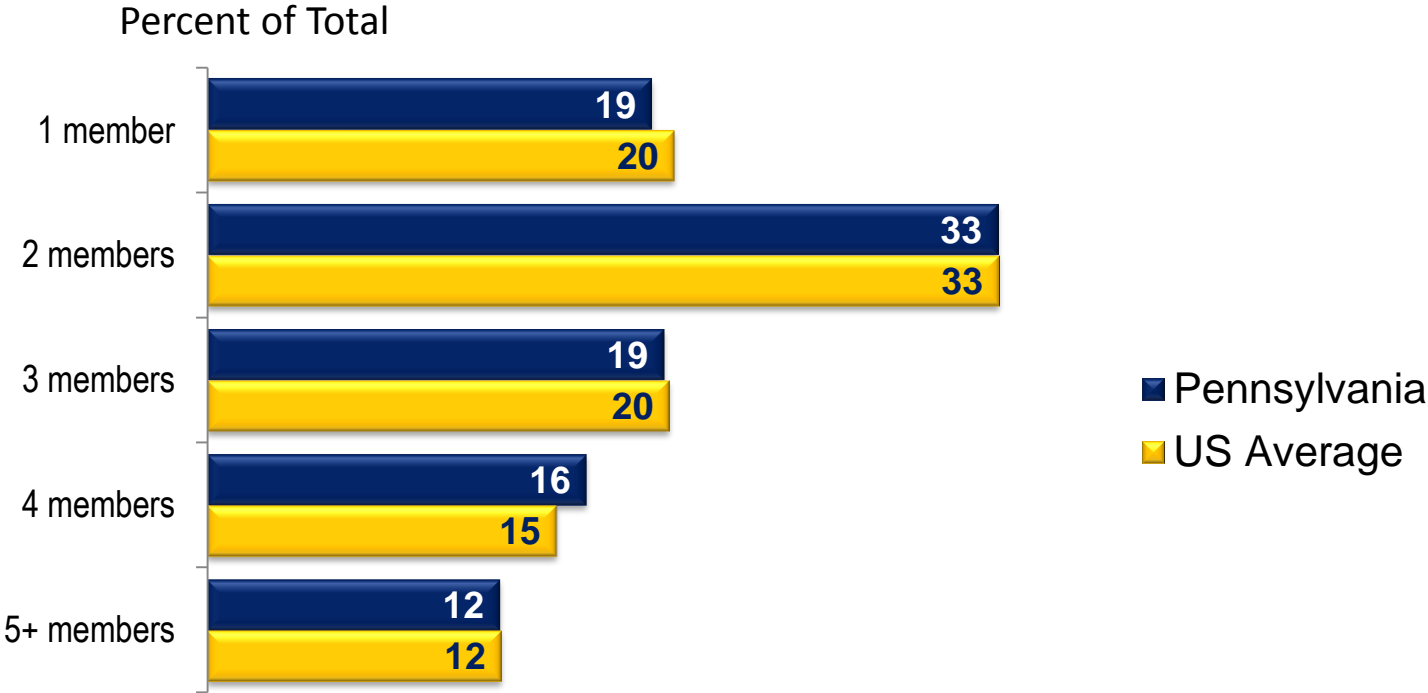
Base: Marketable Day-Trips



# Household Size



Base: Marketable Day-Trips



Average Household Size:

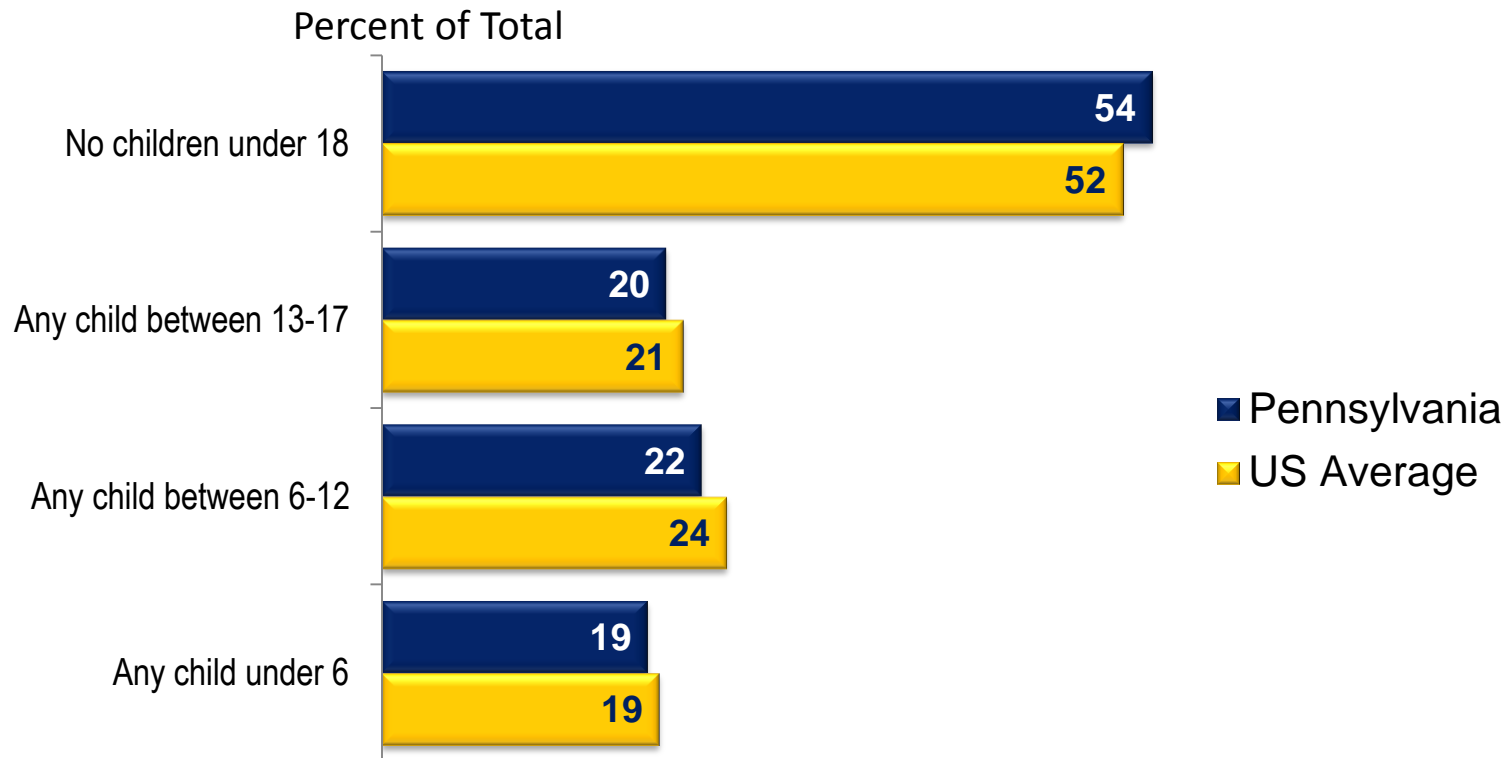
Pennsylvania  
2.8

United States  
2.8

# Children in Household



Base: Marketable Day-Trips

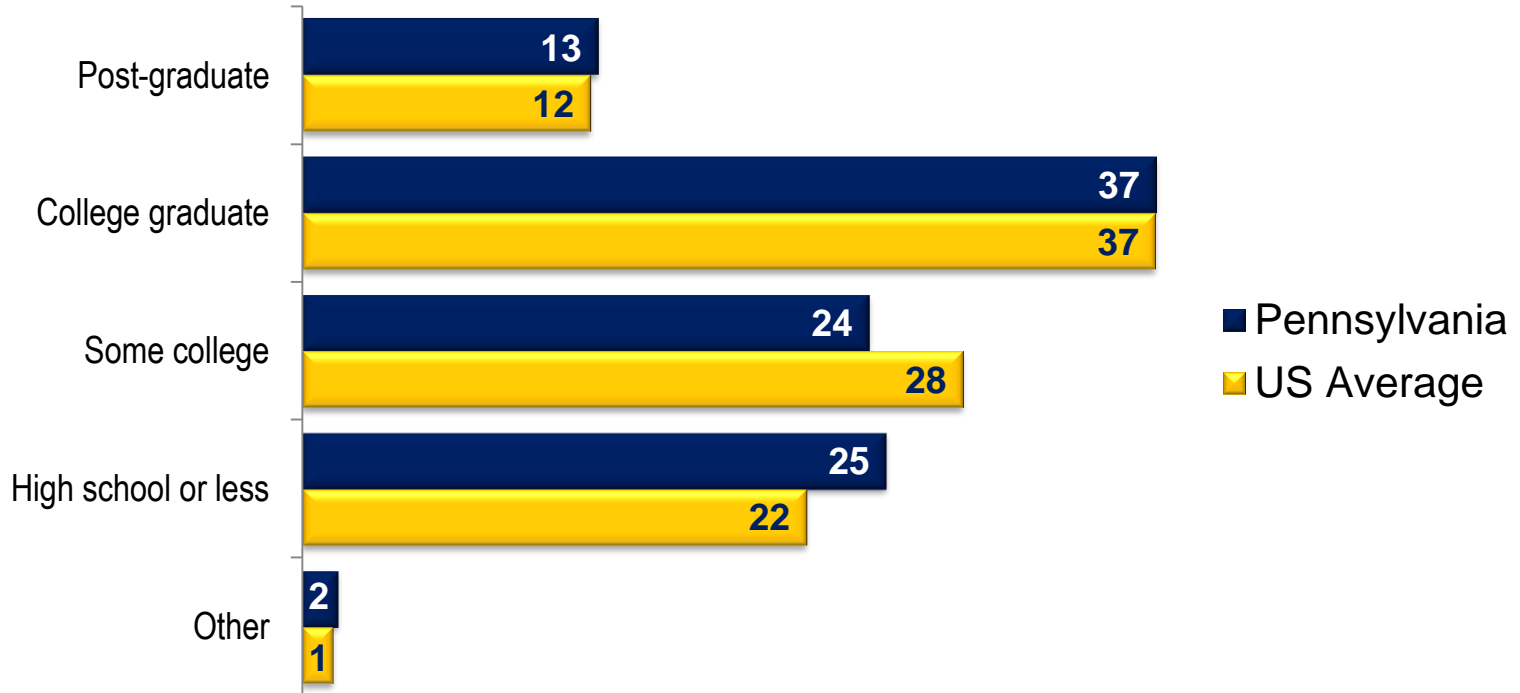


# Education



Base: Marketable Day-Trips

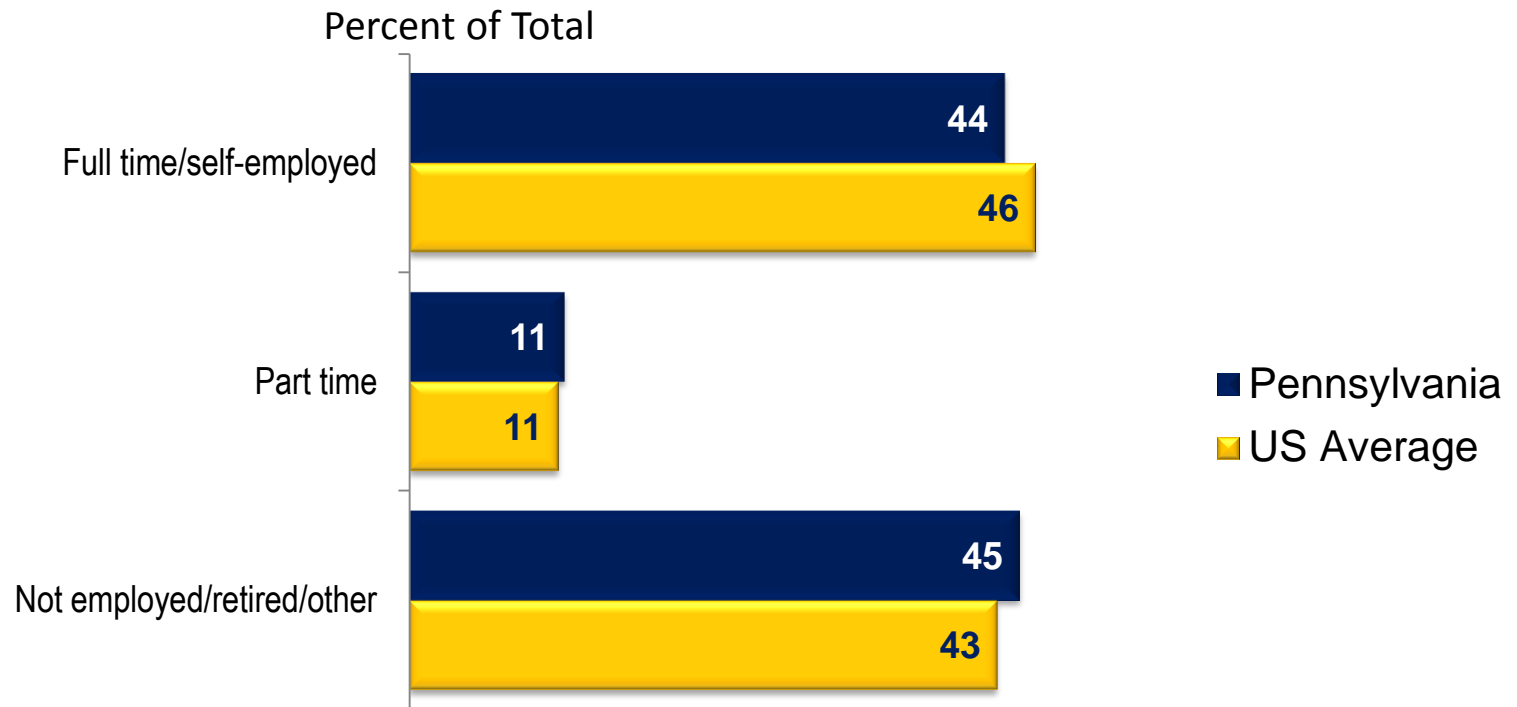
Percent of Total



# Employment



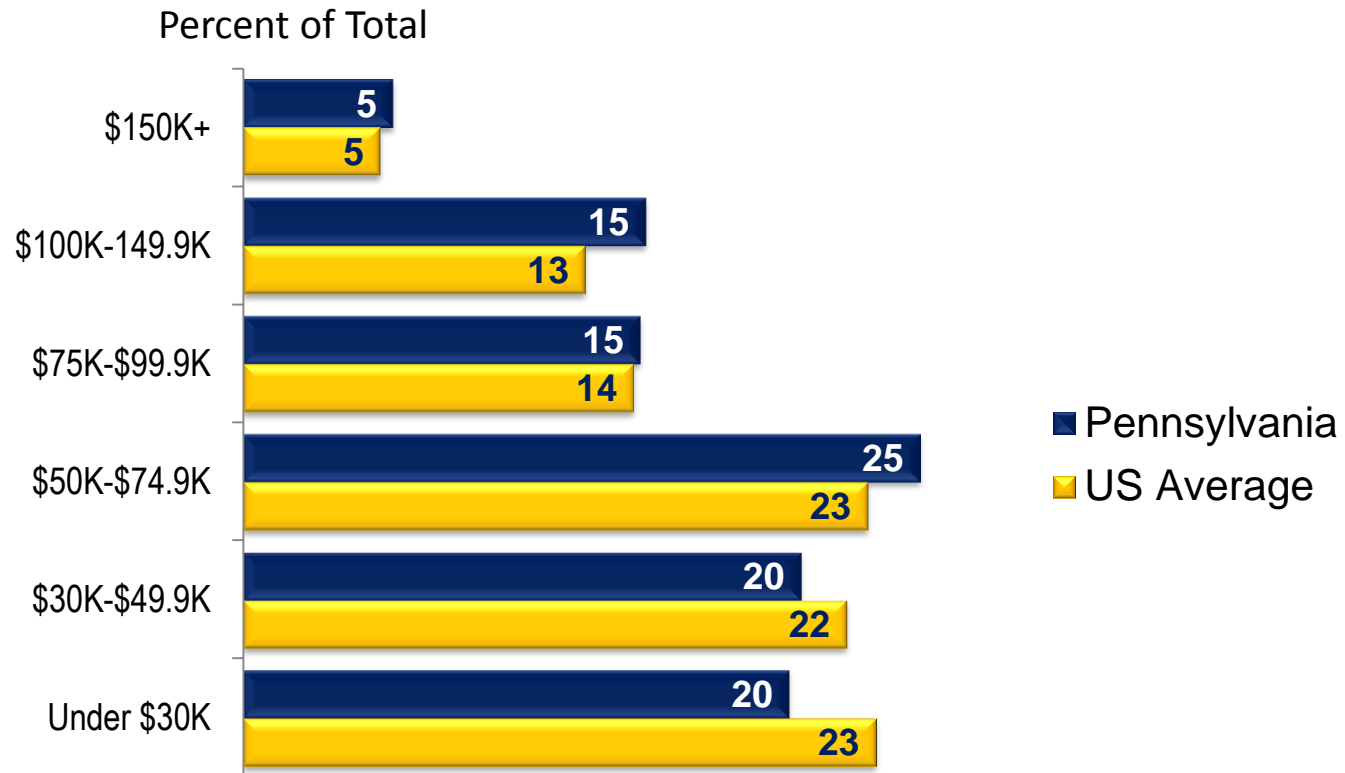
Base: Marketable Day-Trips



# Income



Base: Marketable Day-Trips



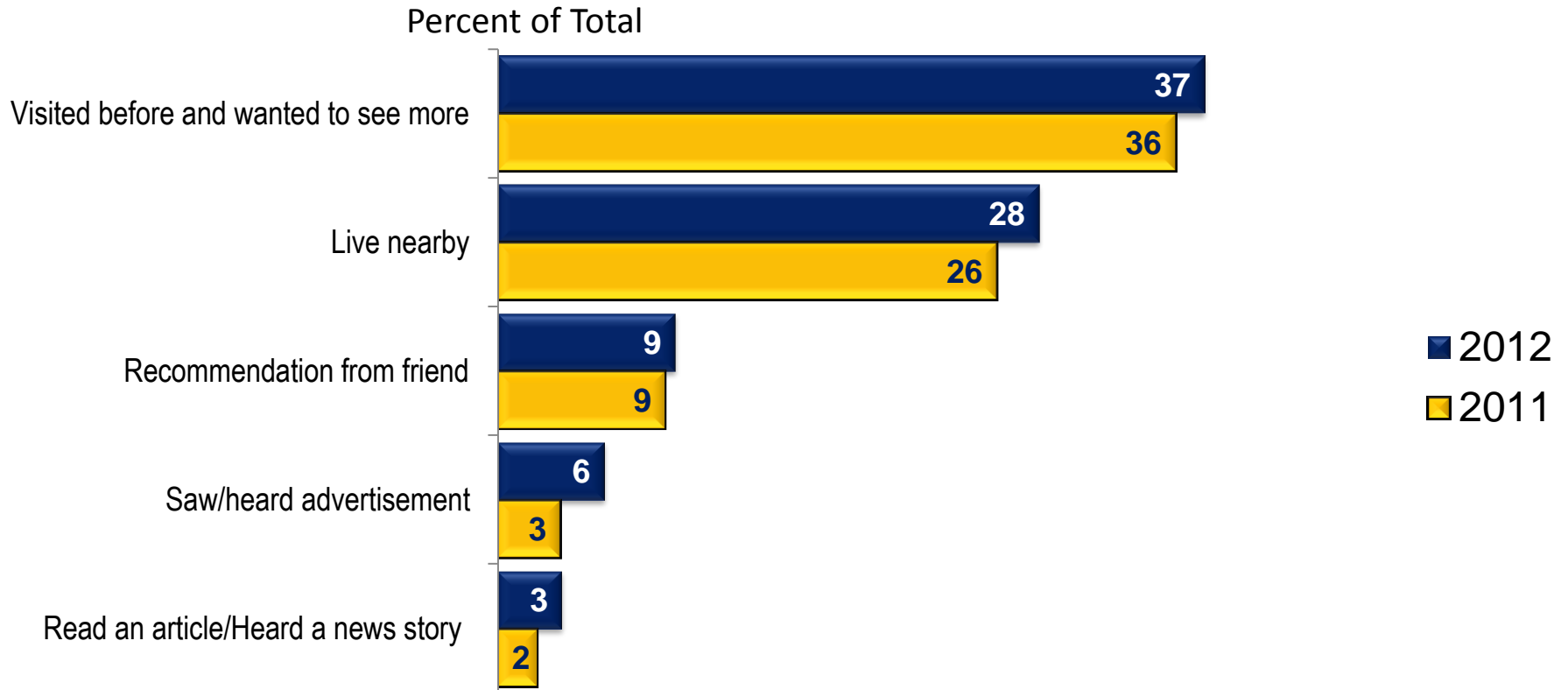


# **Trip Planning & Booking — Marketable Day-Trips**

# Main Reason for Choosing Pennsylvania



Base: Marketable Day-Trips

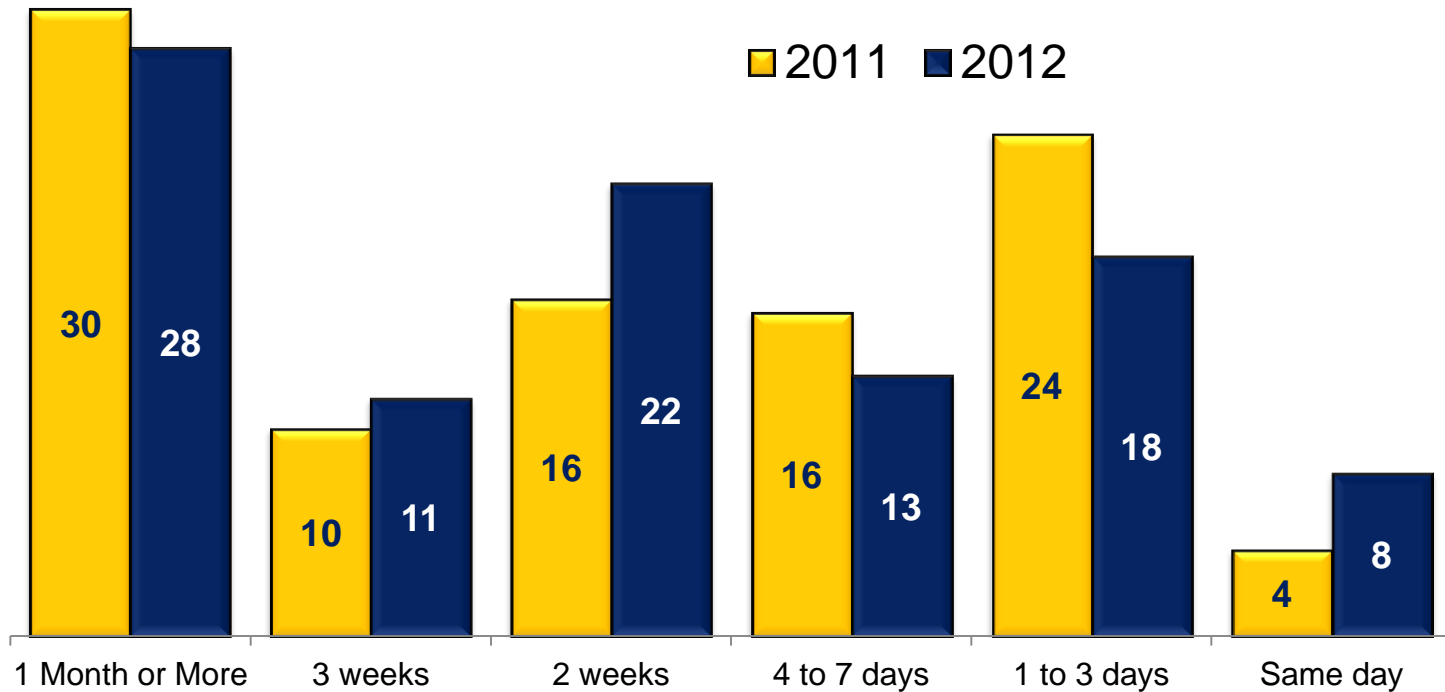


# Planning Cycle



Base: Marketable Day-Trips

Percent of Total

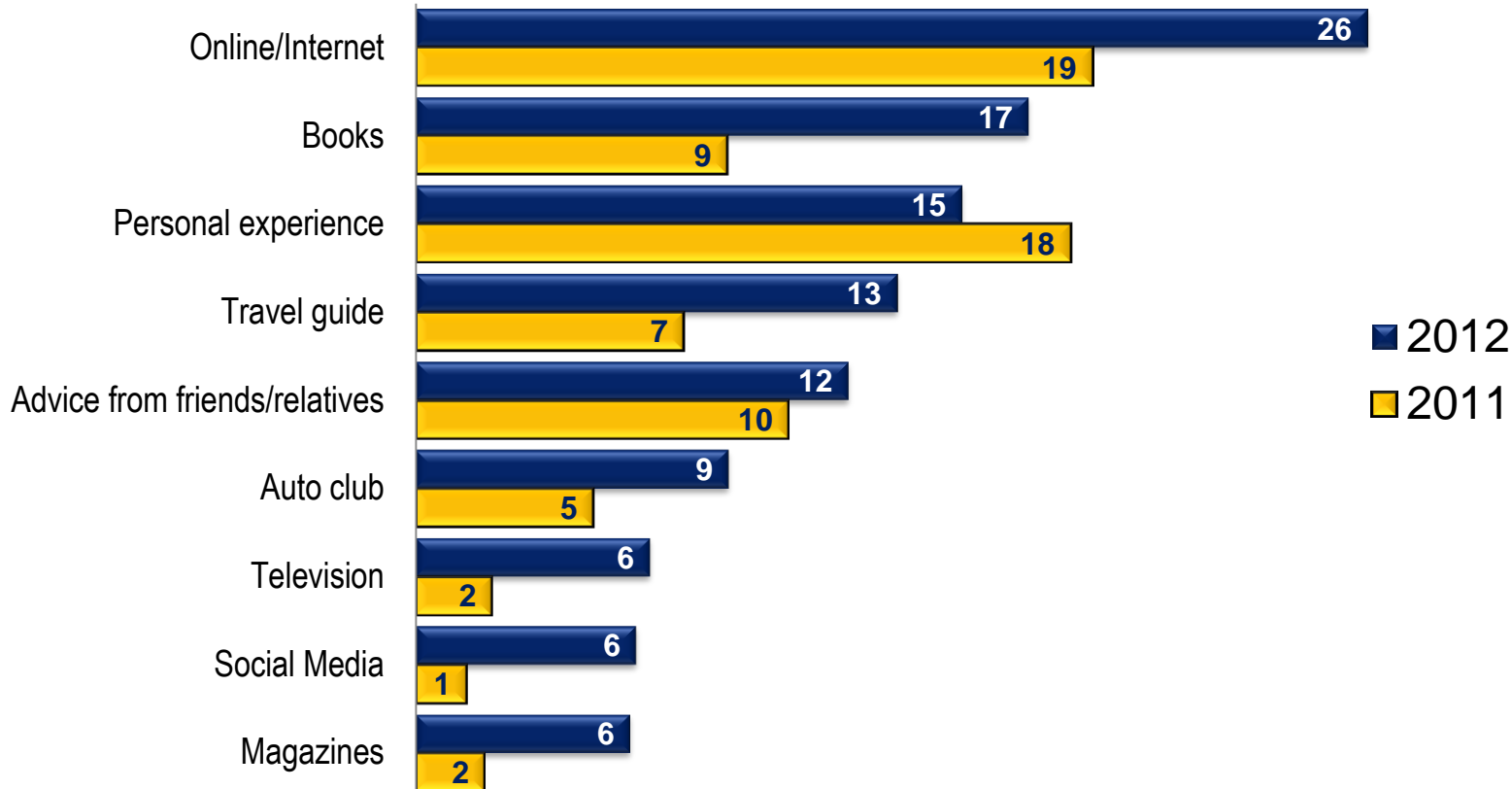


# Information Sources Used for Planning



Base: Marketable Day-Trips

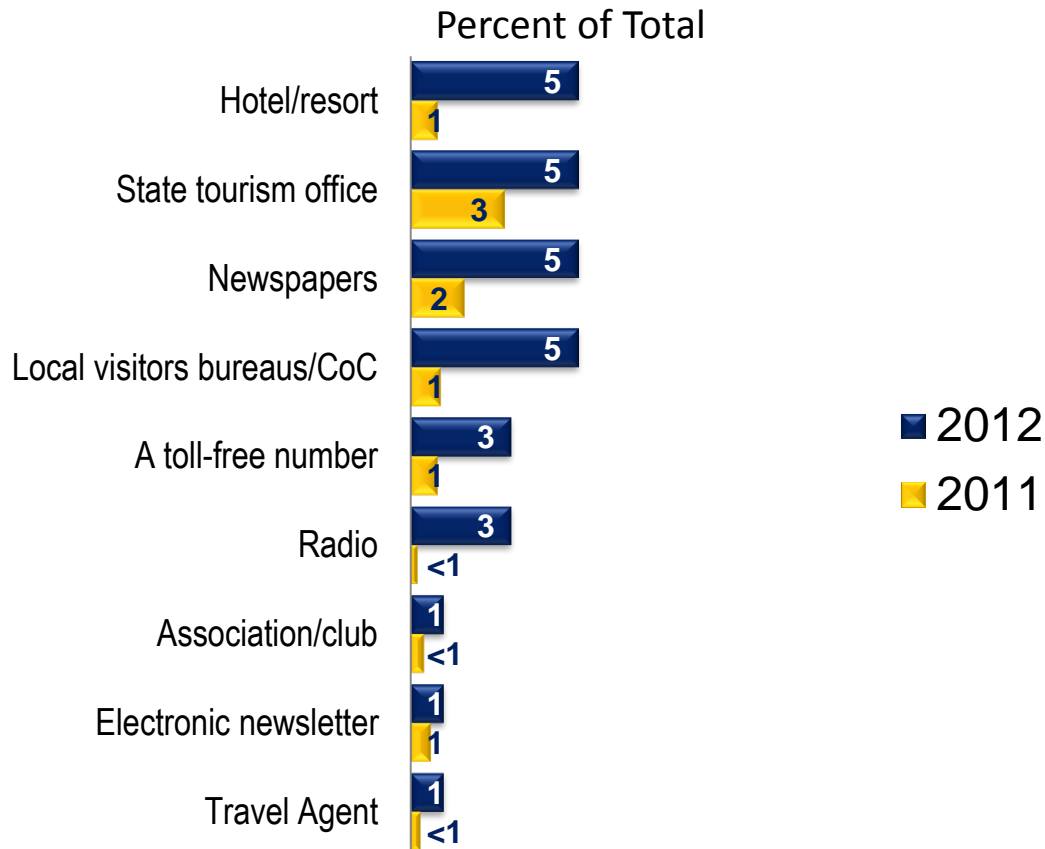
Percent of Total



# Information Sources Used for Planning (cont'd)



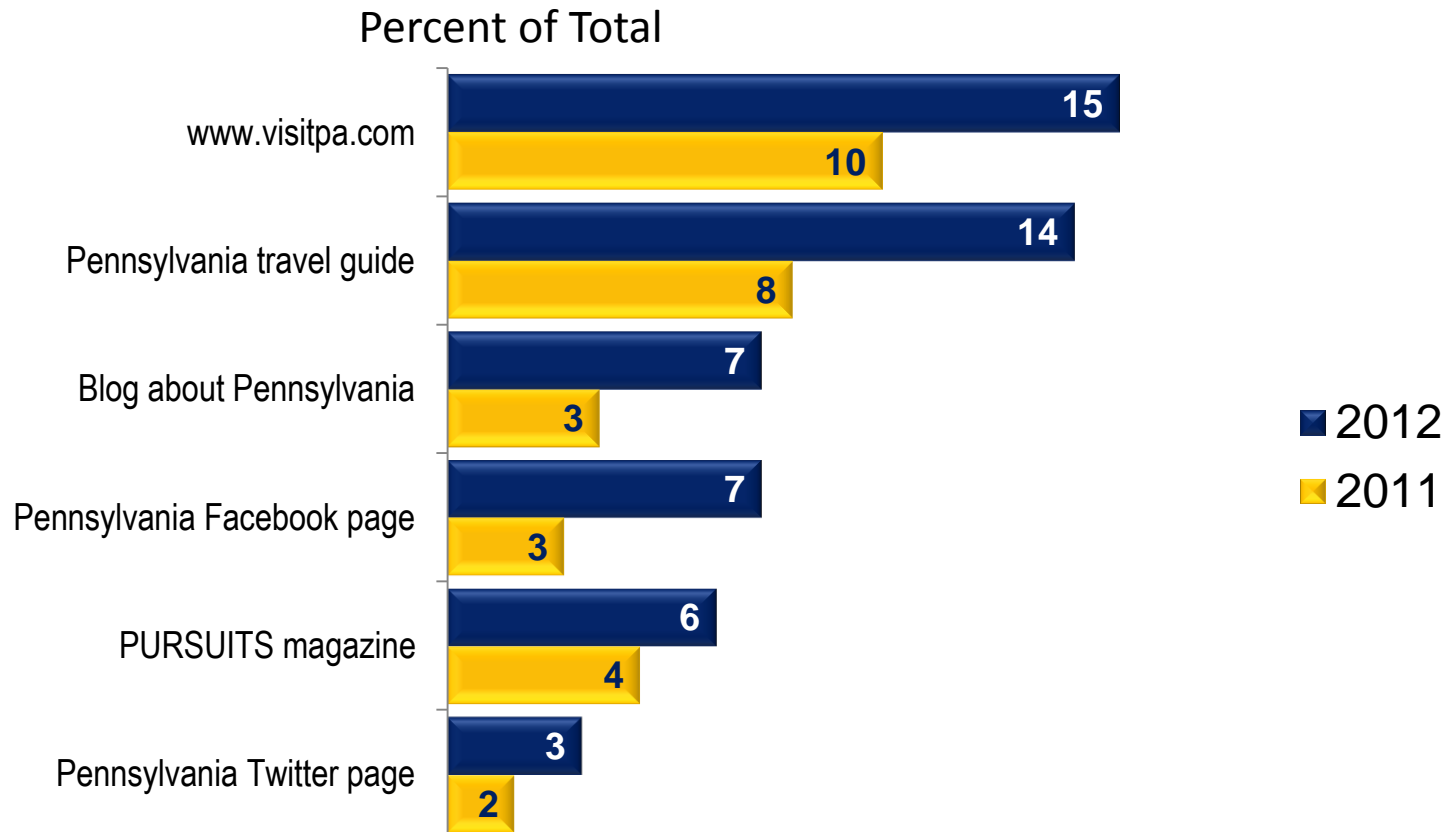
Base: Marketable Day-Trips



# Use of Pennsylvania Trip Planning Tools



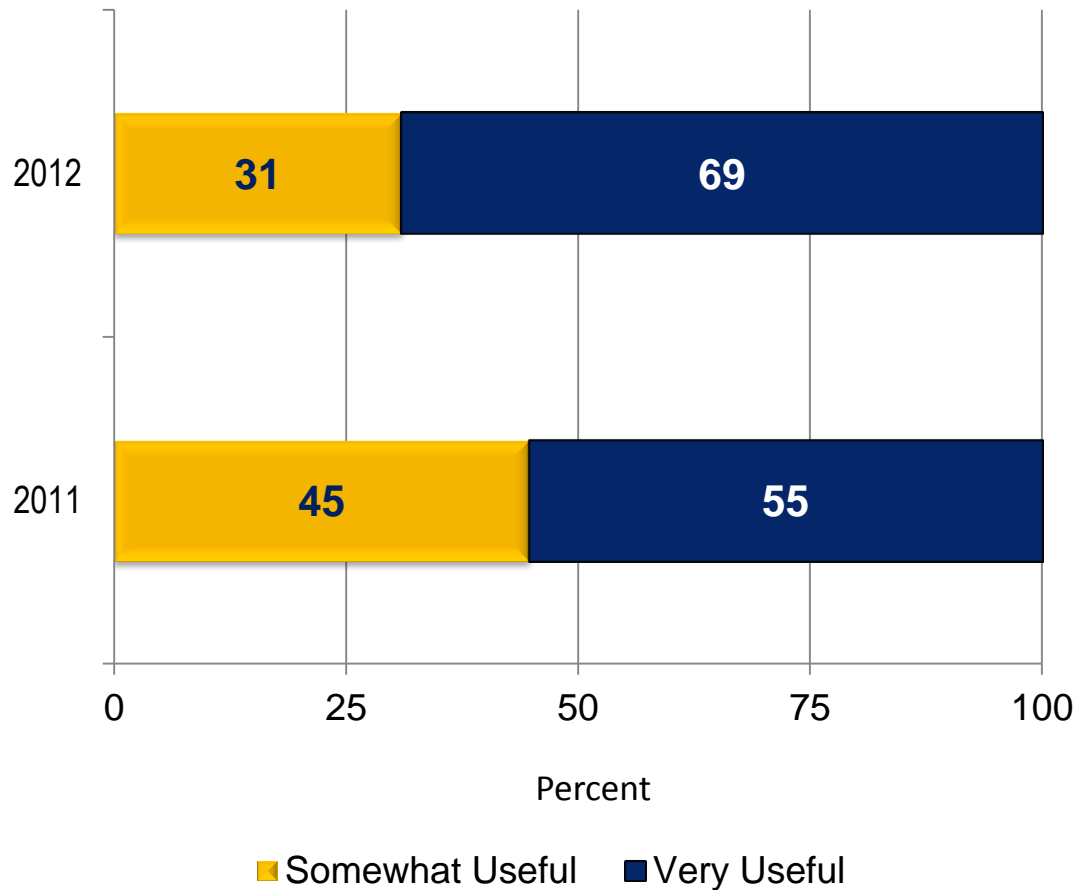
Base: Marketable Day-Trips



# www.visitpa.com Usefulness



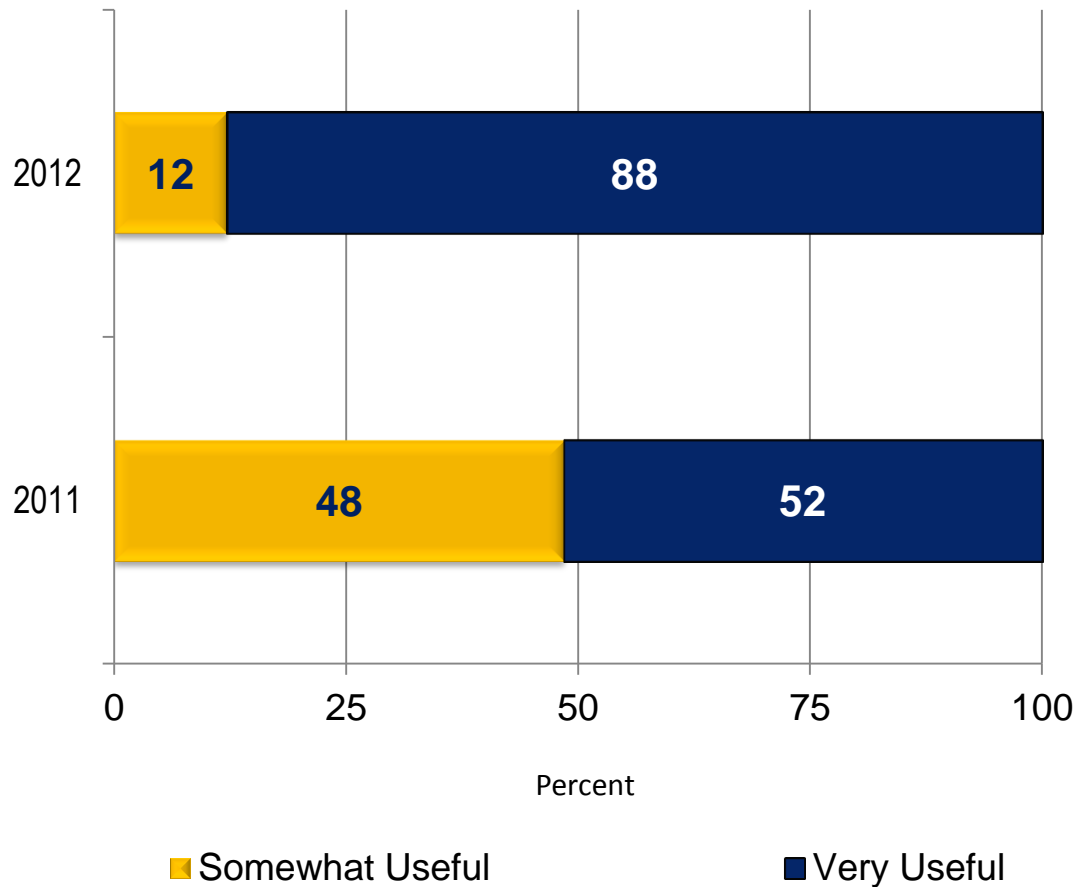
Base: Marketable Day-Trips



# Travel Guide Usefulness



Base: Marketable Day-Trips



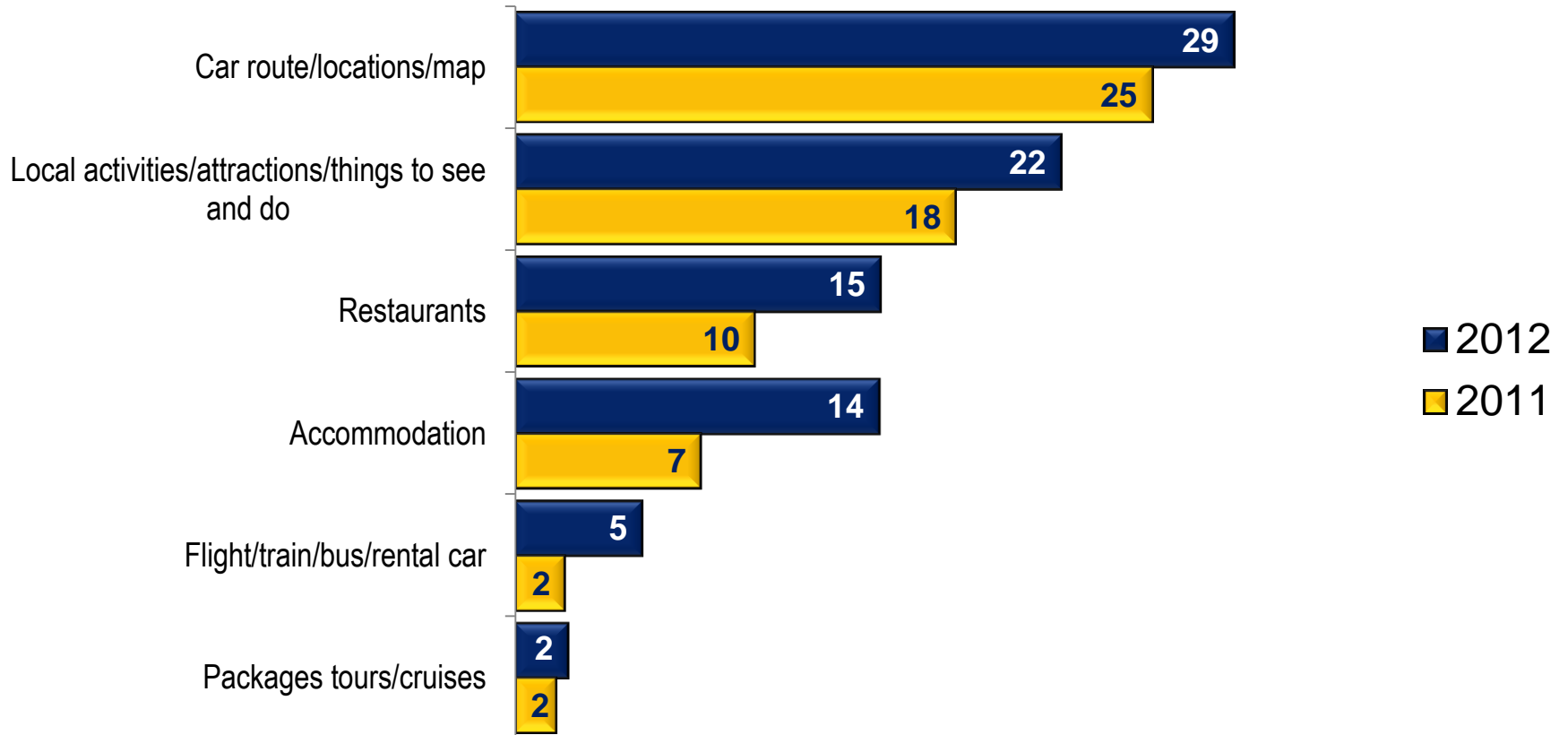


# Trip Elements Planned Using Internet



Base: Marketable Day-Trips

Percent of Total

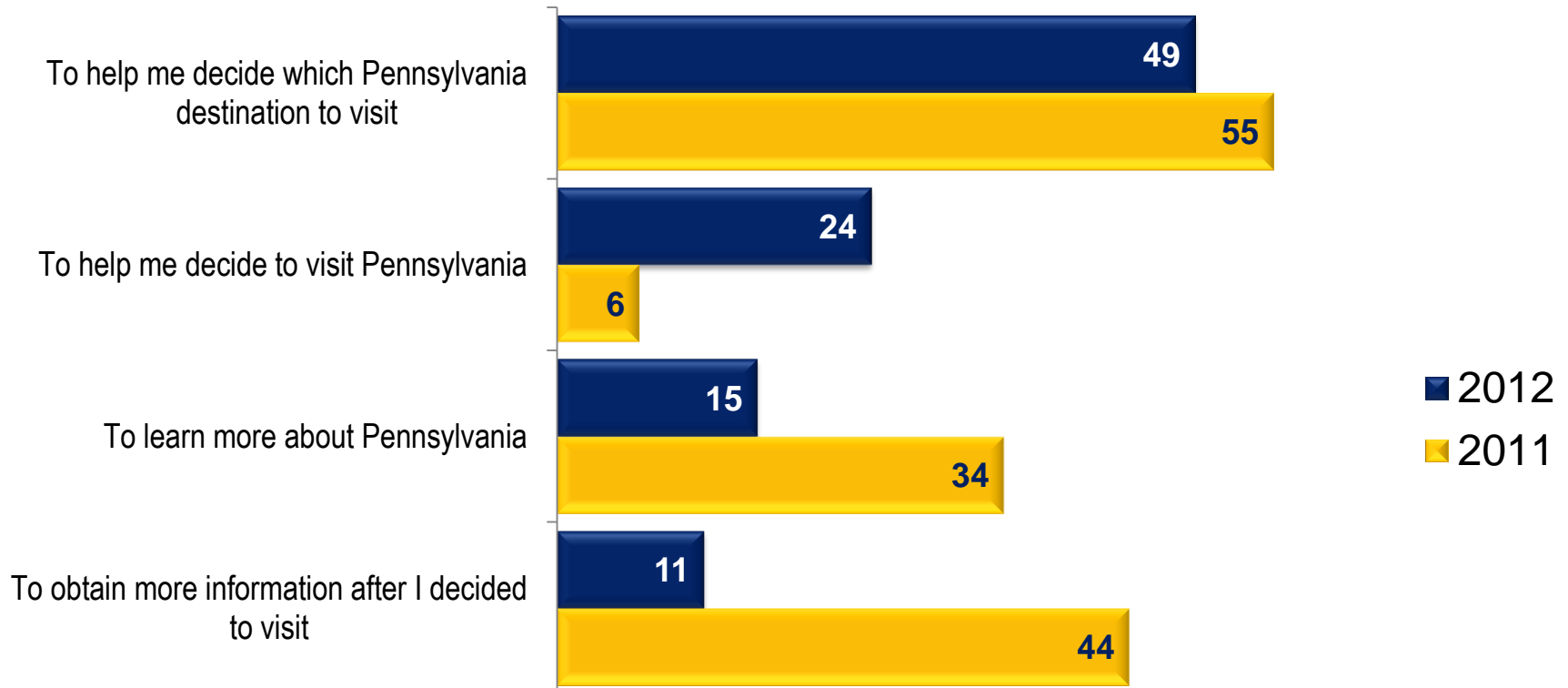


# Reasons for Visiting [www.visitpa.com](http://www.visitpa.com)



Base: Marketable Day-Trips

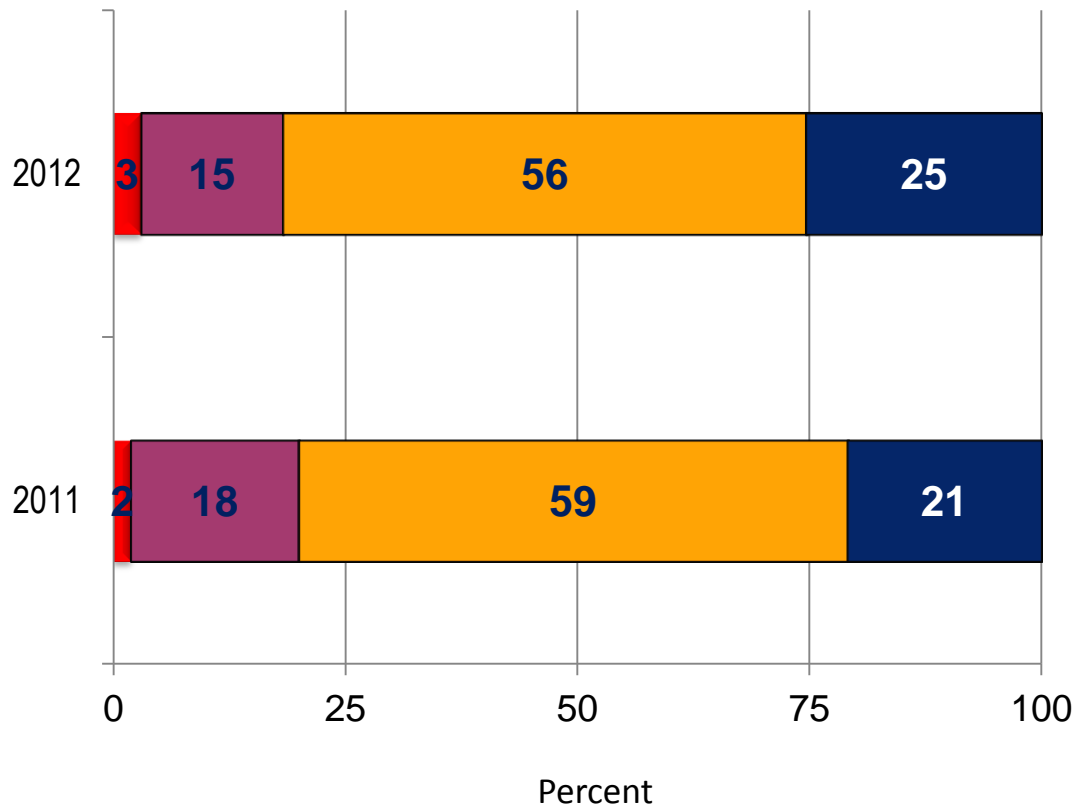
Percent of Total



# www.visitpa.com Influence on Planning



Base: Marketable Day-Trips

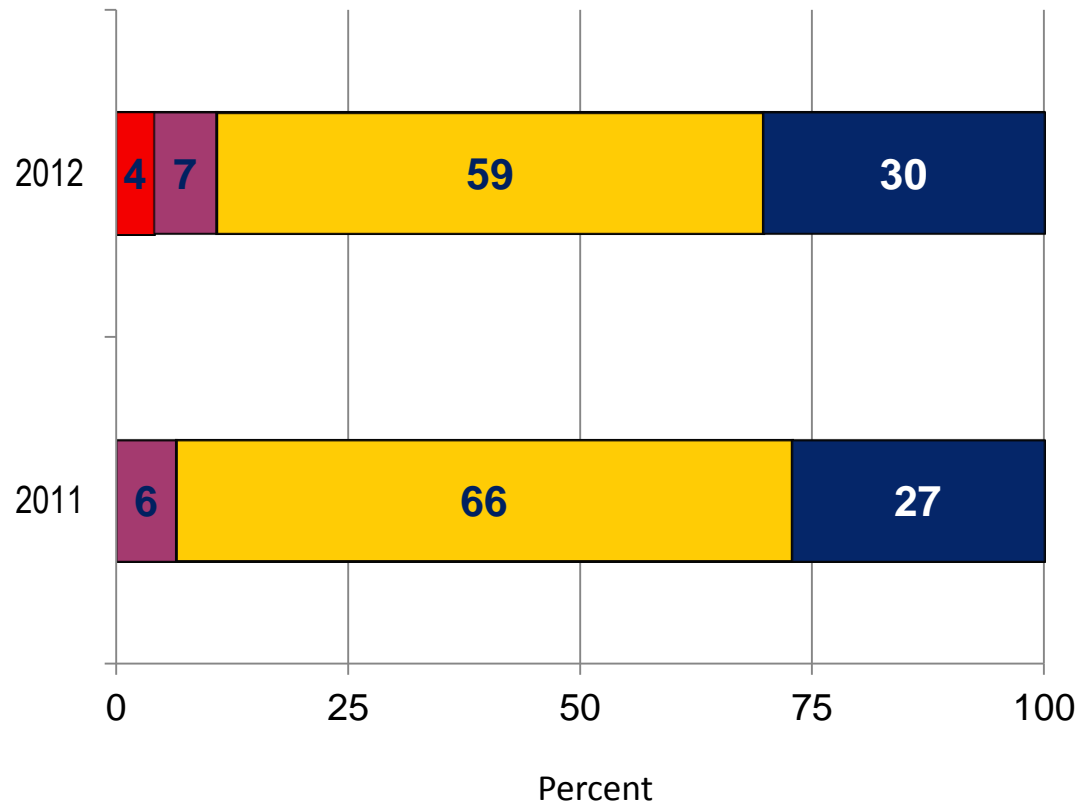


■ No Influence   ■ Very little Influence   ■ Some Influence   ■ Large Influence

# [www.visitpa.com](http://www.visitpa.com) Influence on Visitation



Base: Marketable Day-Trips

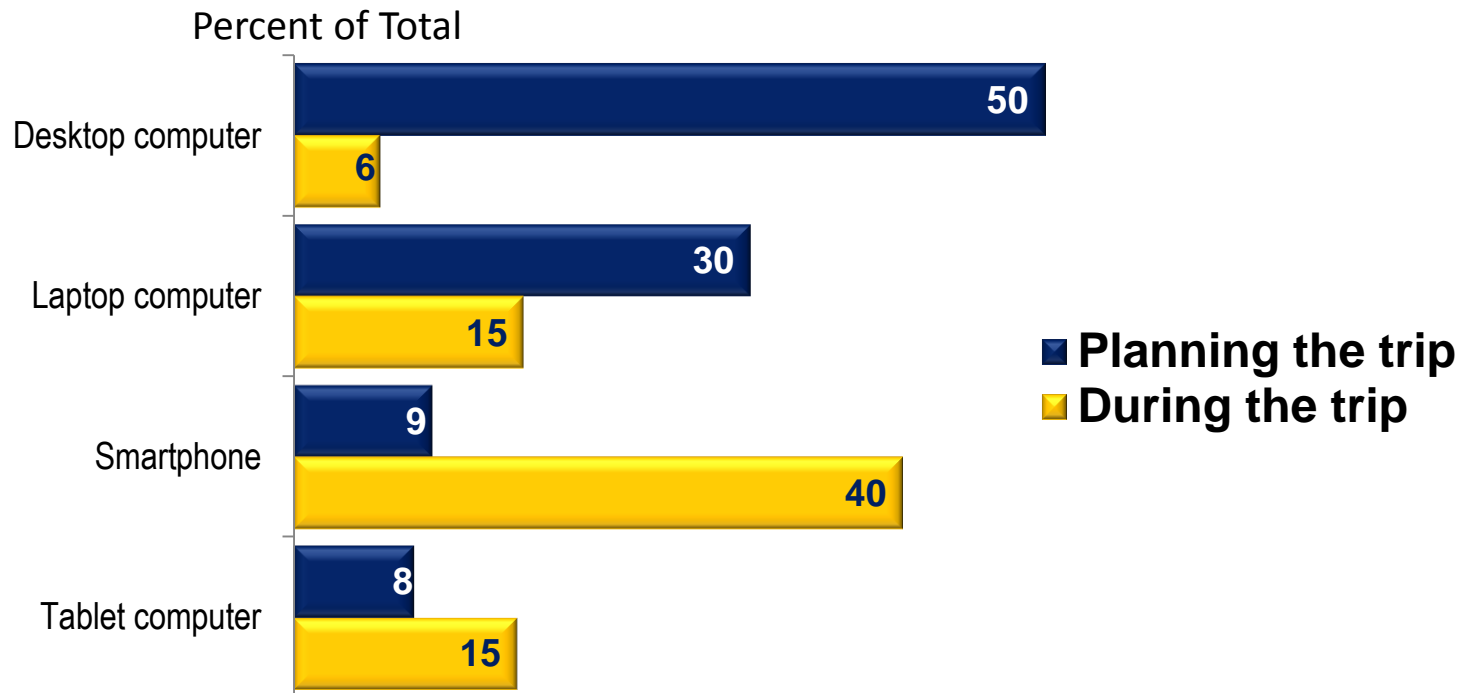


■ No Influence   ■ Very little Influence   ■ Some Influence   ■ Large Influence

# Technology Used by Travelers



Base: Marketable Day-Trips

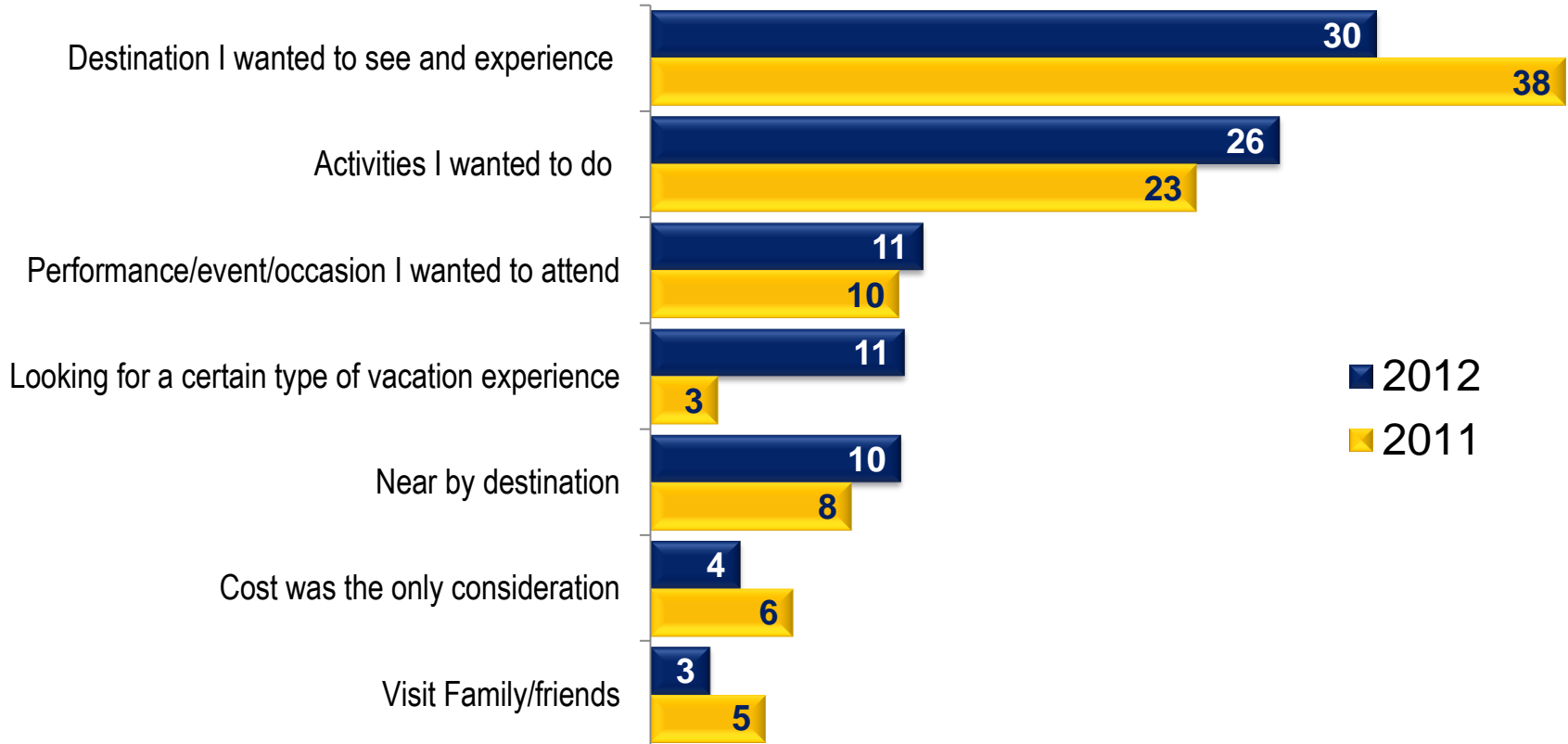


# Planning Considerations Beyond Cost



Base: Marketable Day-Trips

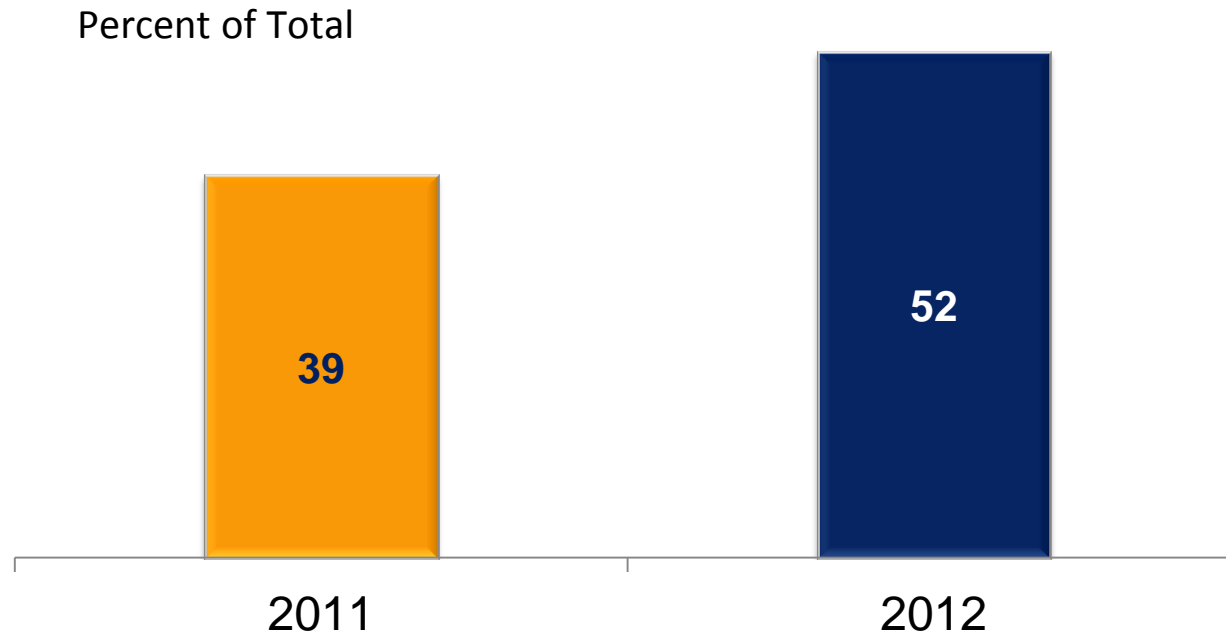
Percent of Total



# Percent Who Booked In Advance



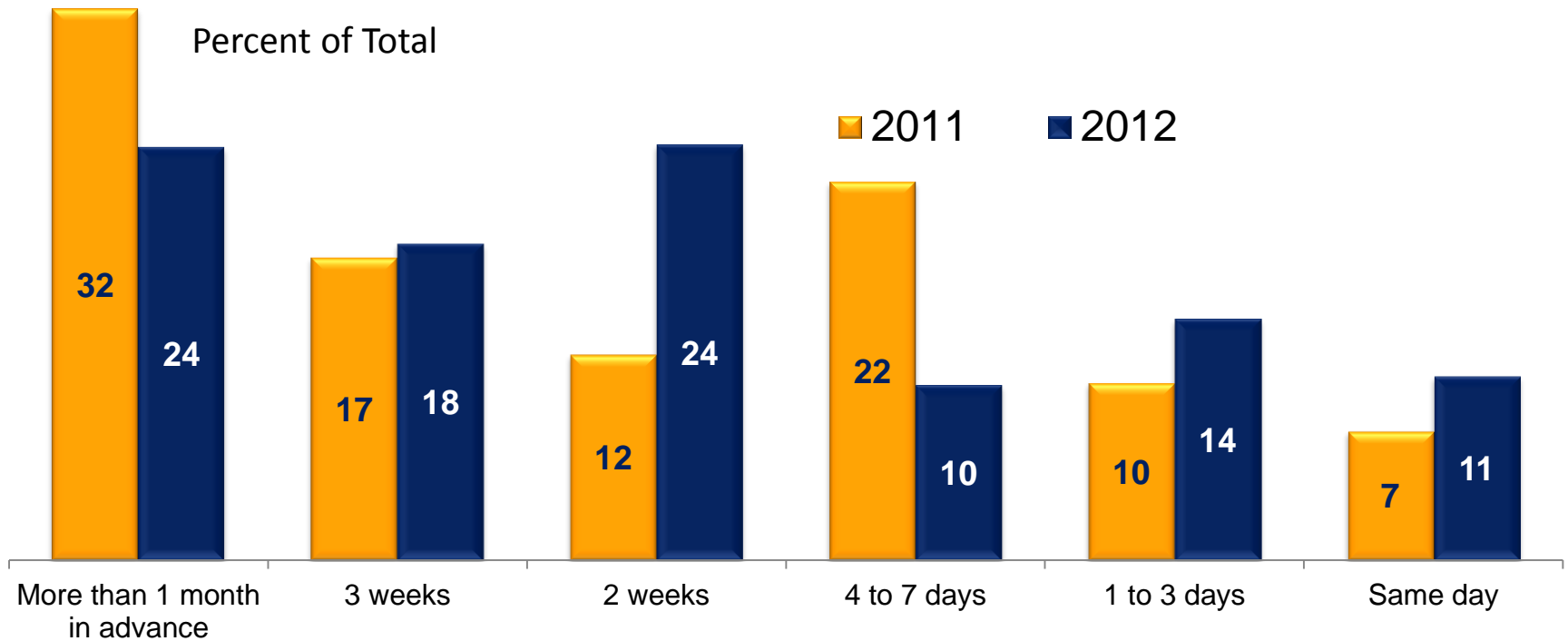
Base: Marketable Day-Trips



# Booking Cycle



Base: Marketable Day-Trips Booked in Advance

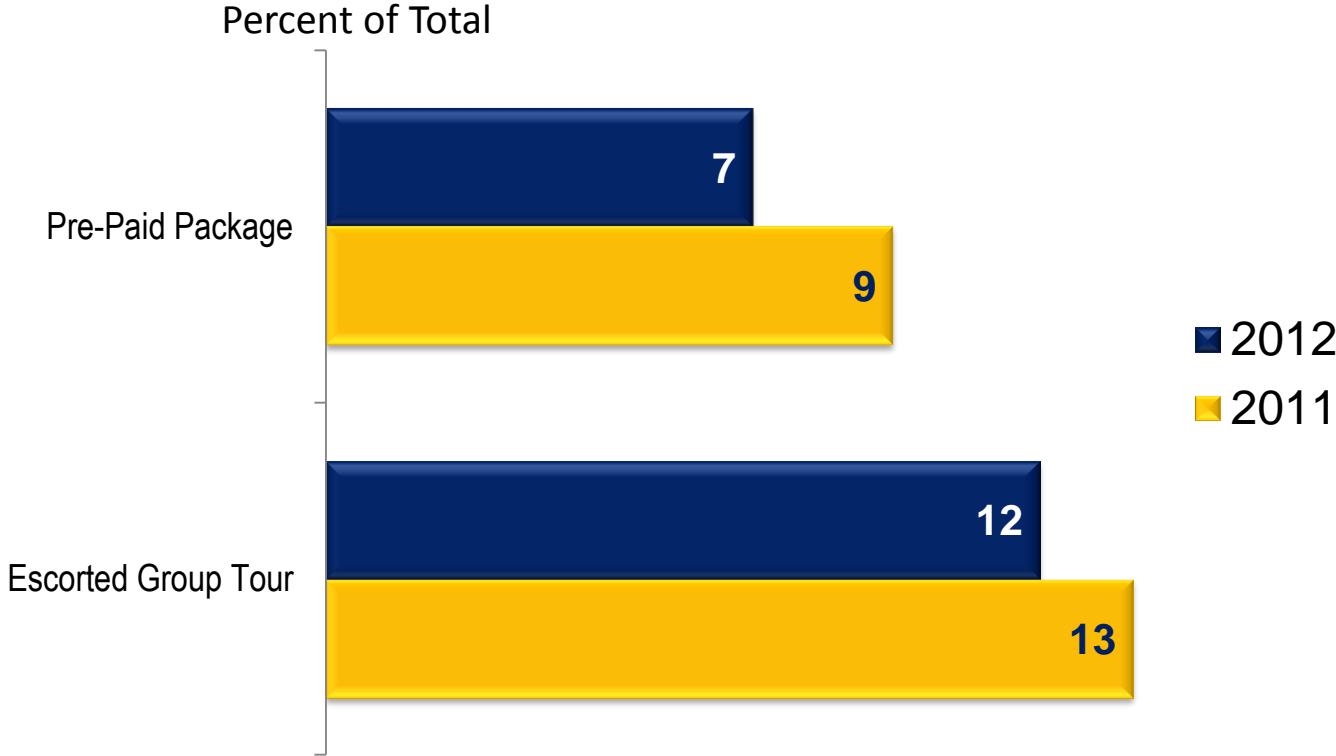




# Use of Vacation Packages and Group Travel



Base: Marketable Day-Trips

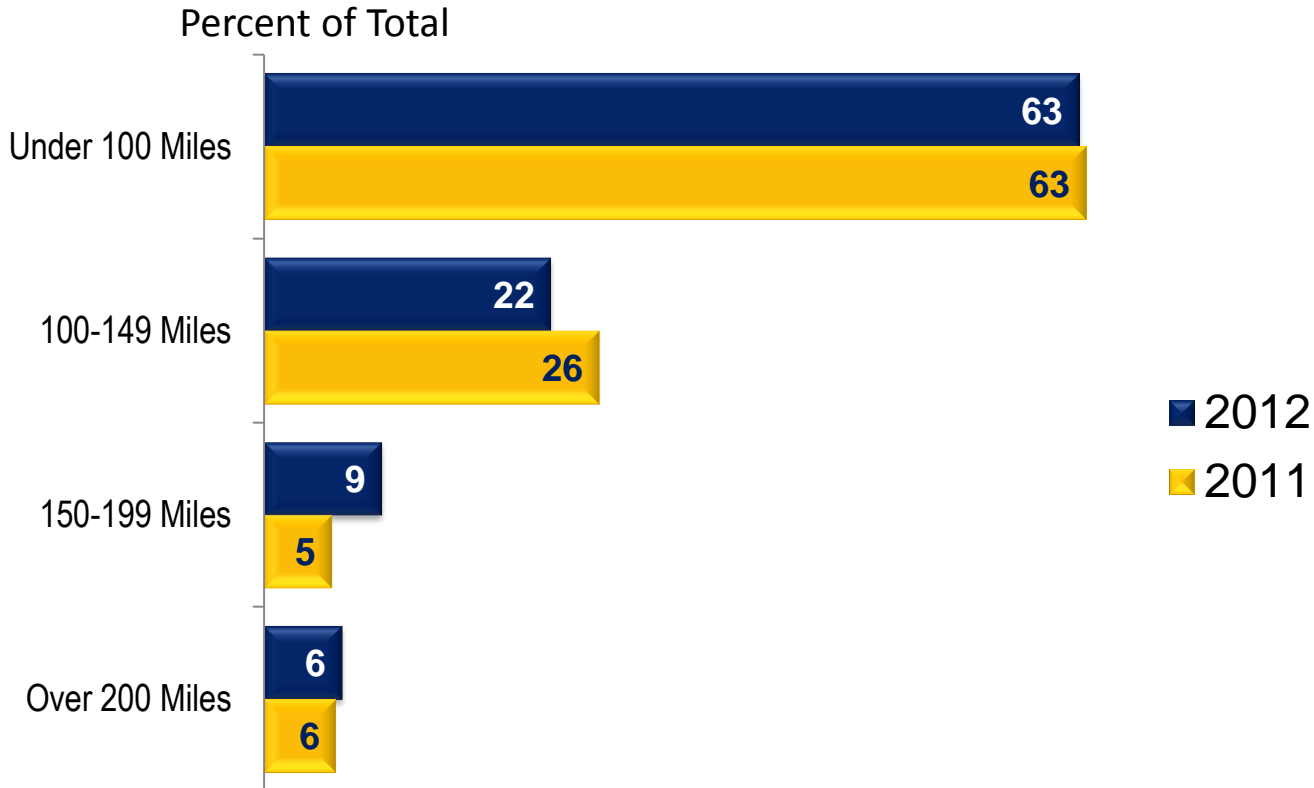


# Marketable Day-Trip Characteristics

# Distance Traveled for Pennsylvania Day-Trip



Base: Marketable Day-Trips

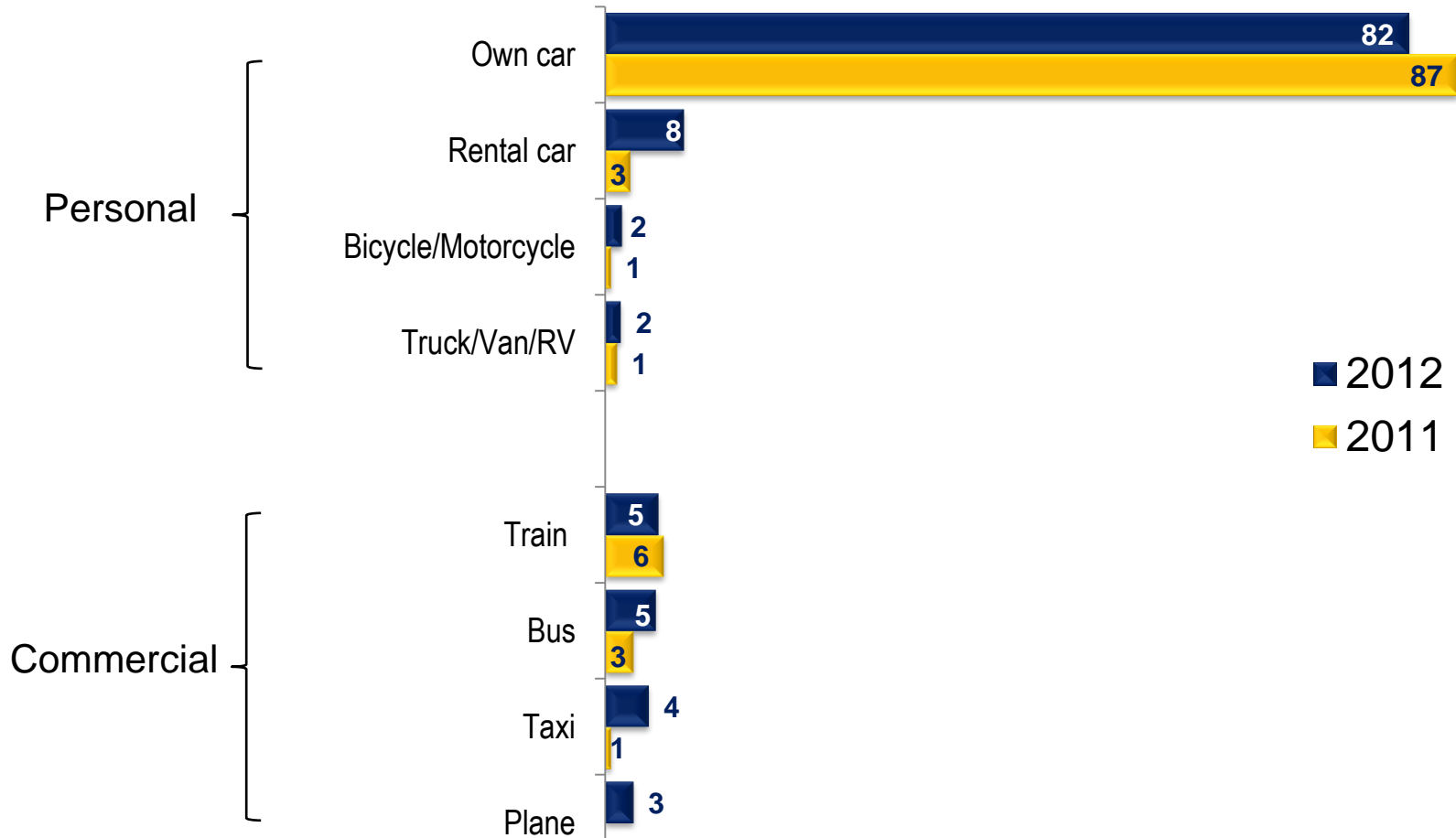


# Transportation Used to Enter Pennsylvania



Base: Marketable Day-Trips

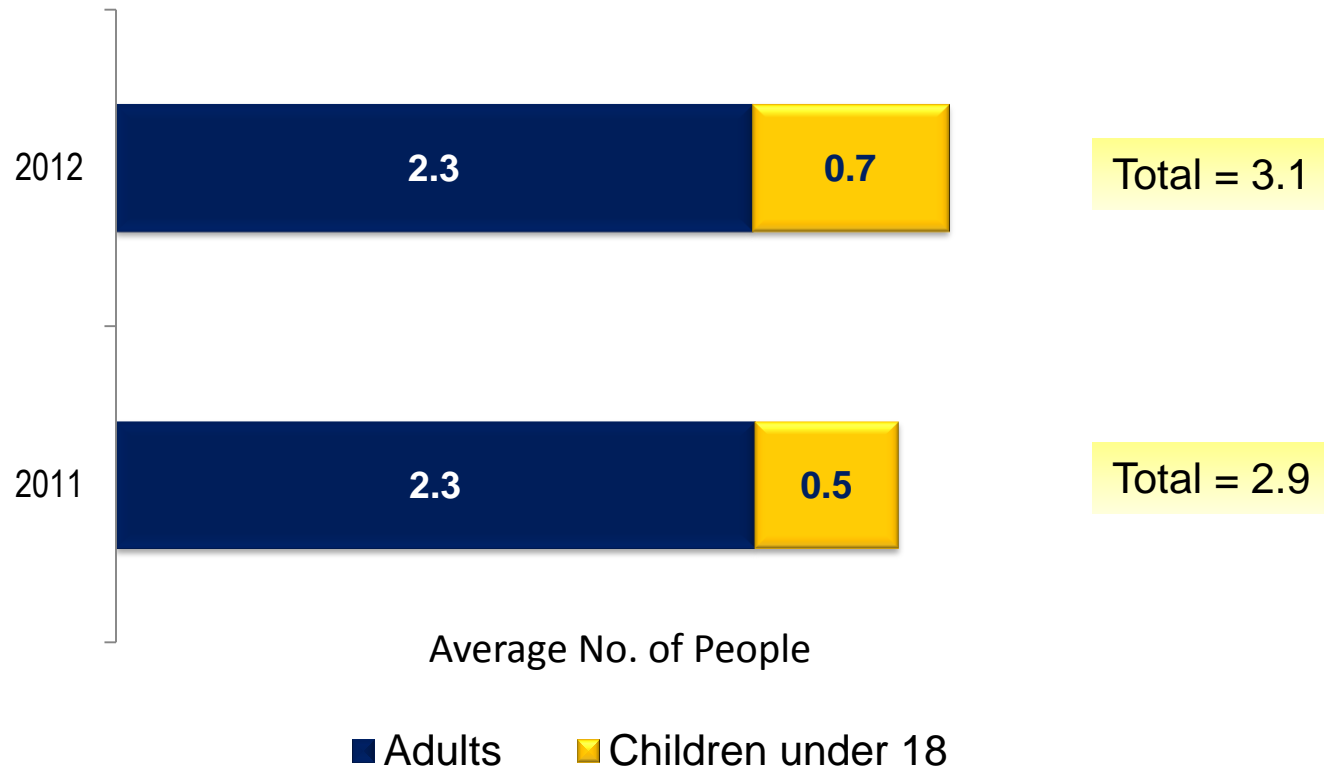
Percent of Total



# Size of Travel Party



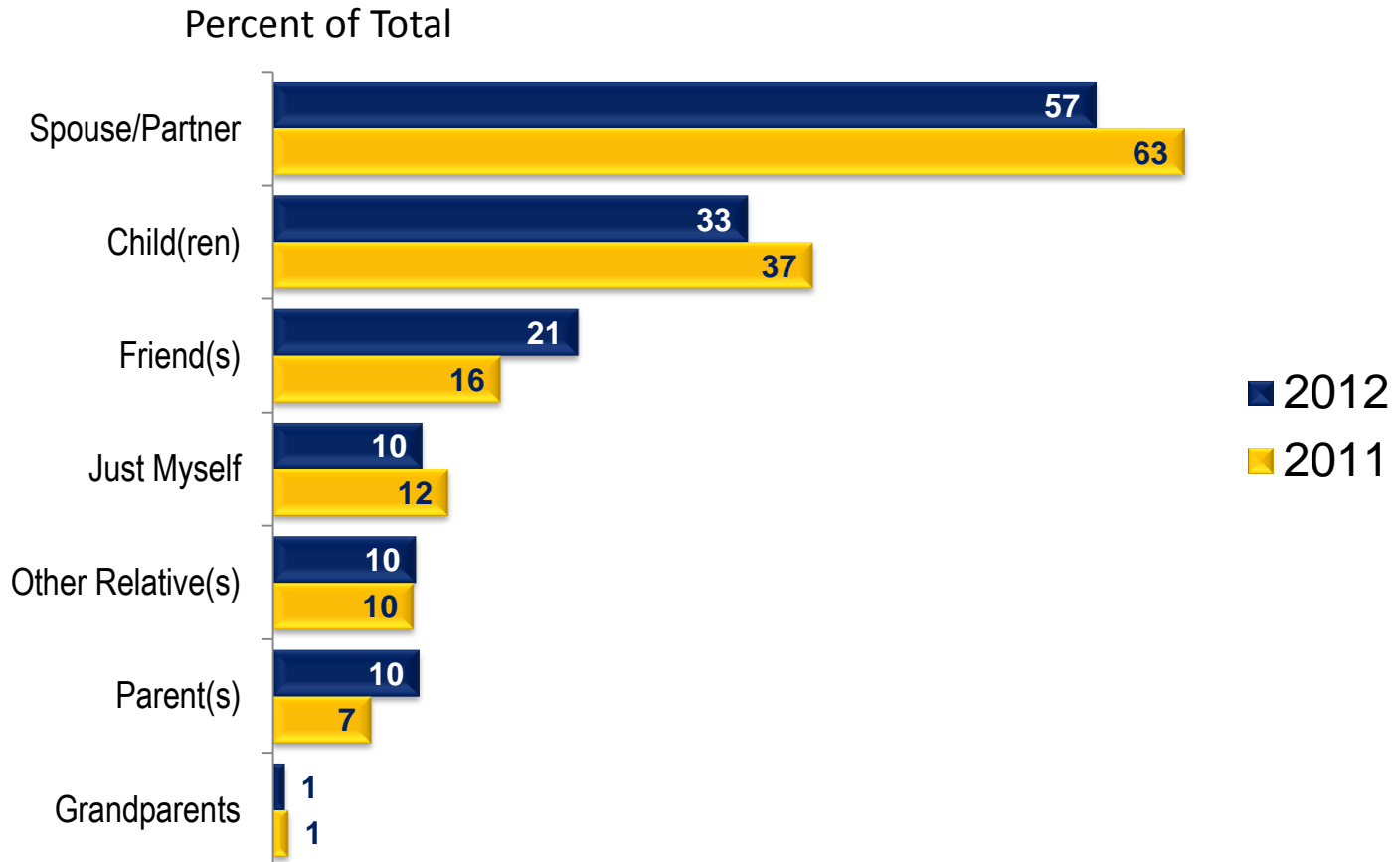
Base: Marketable Day-Trips



# Composition of Travel Party



Base: Marketable Day-Trips



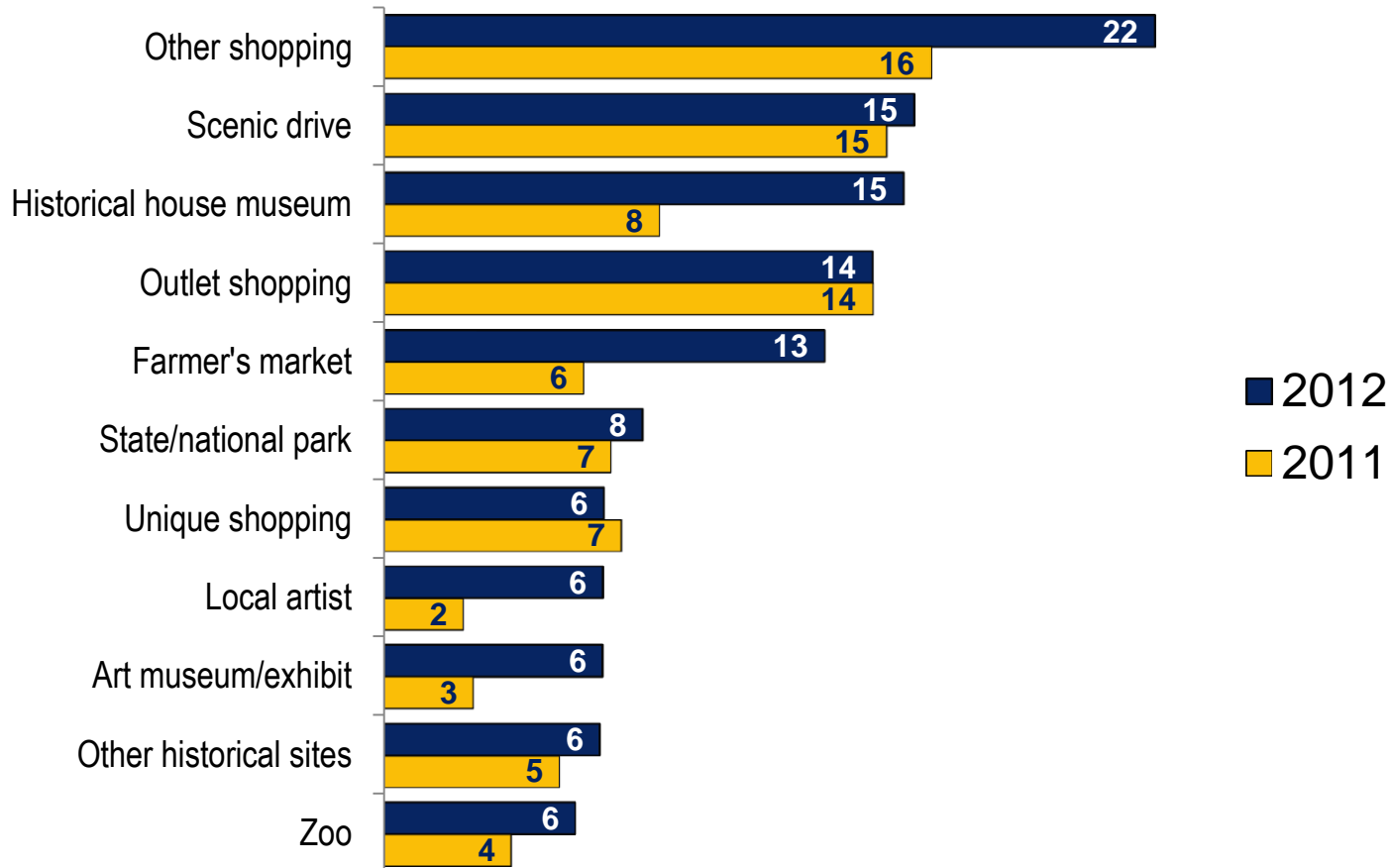
**Trip Experiences —  
Marketable Day-Trips**

# Things Seen and Experienced on Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total



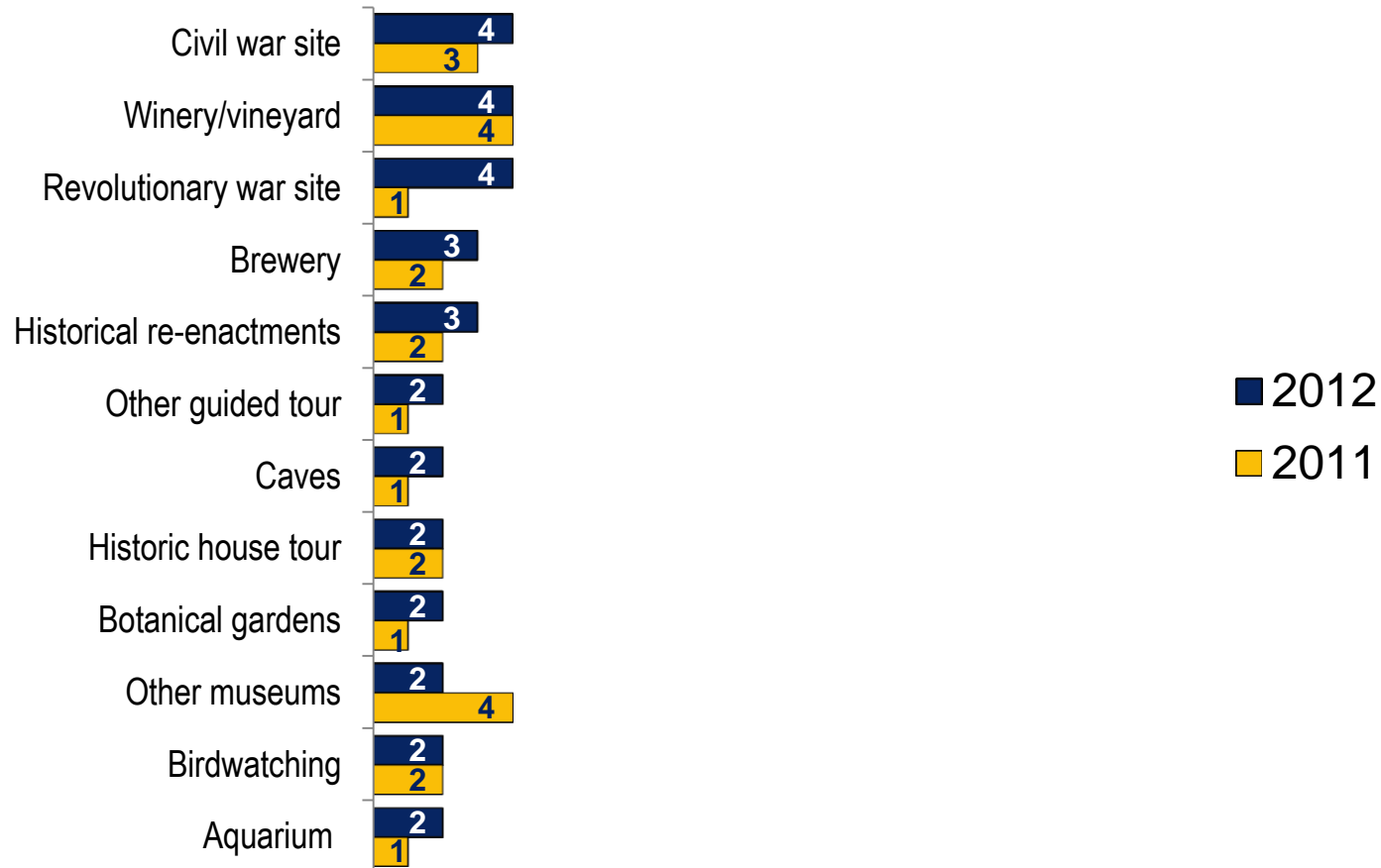


# Things Seen and Experienced on Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

Percent of Total

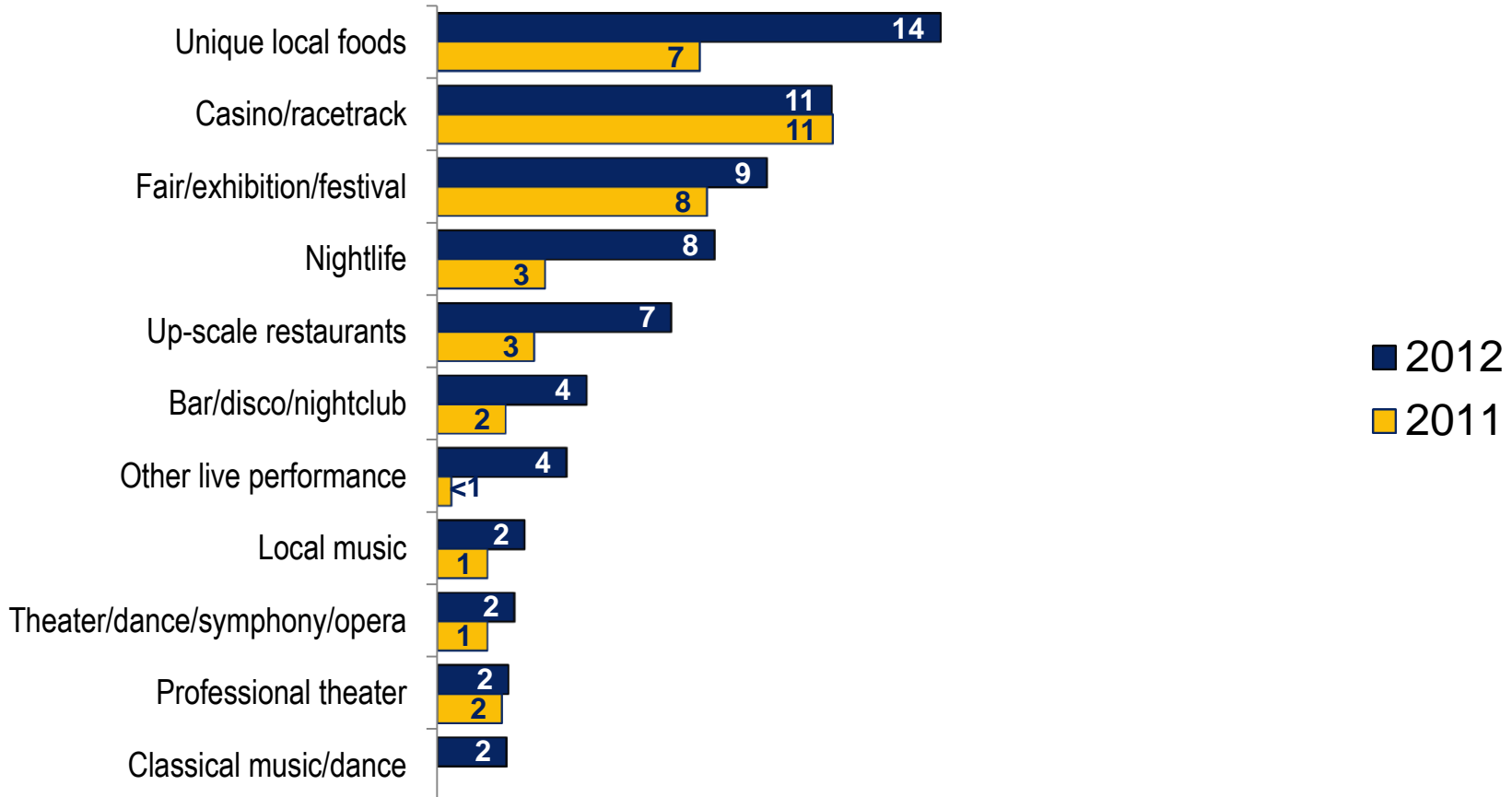


# Dining/Entertainment



Base: Marketable Day-Trips

Percent of Total

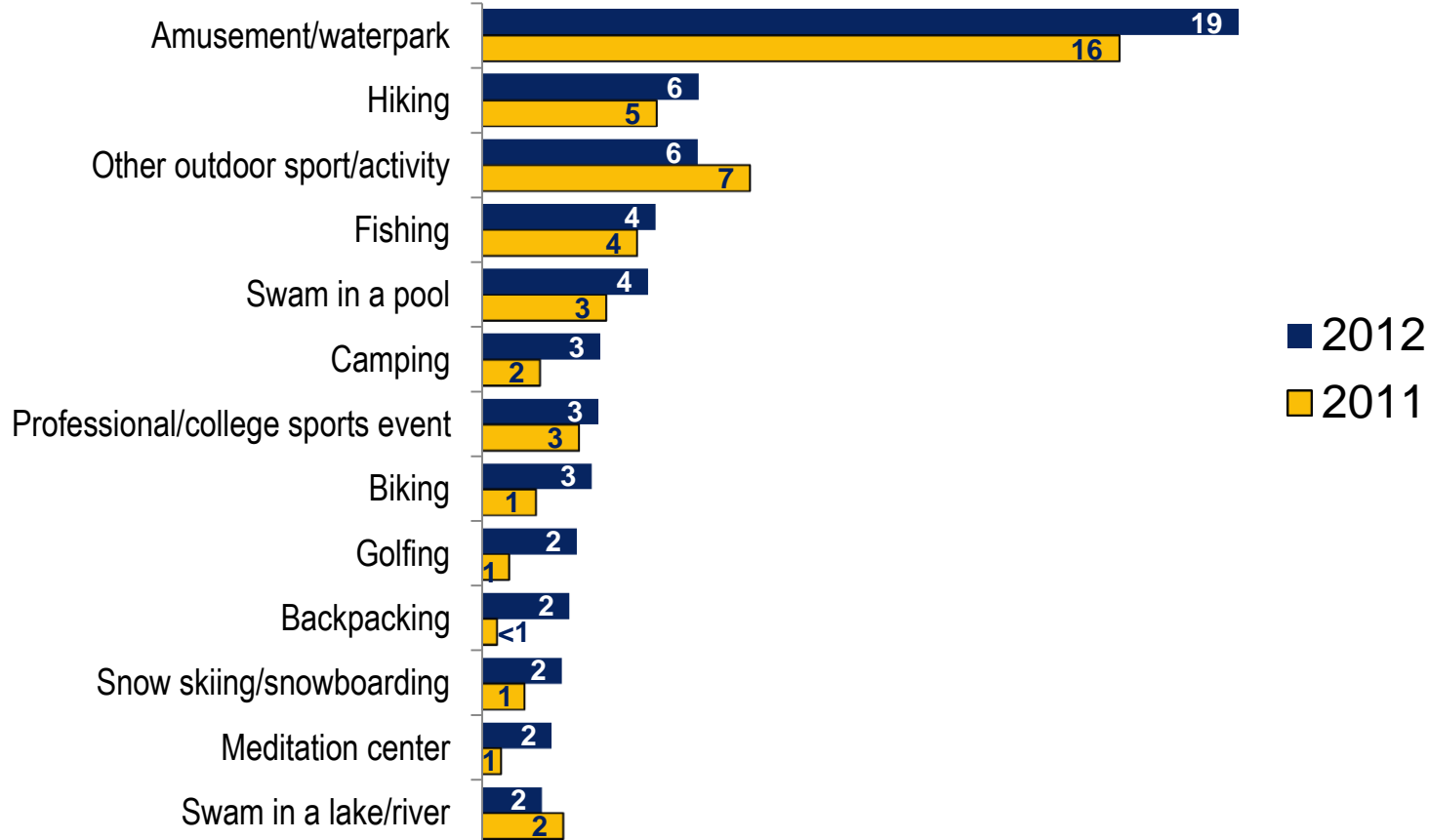


# Sports and Recreation



Base: Marketable Day-Trips

Percent of Total



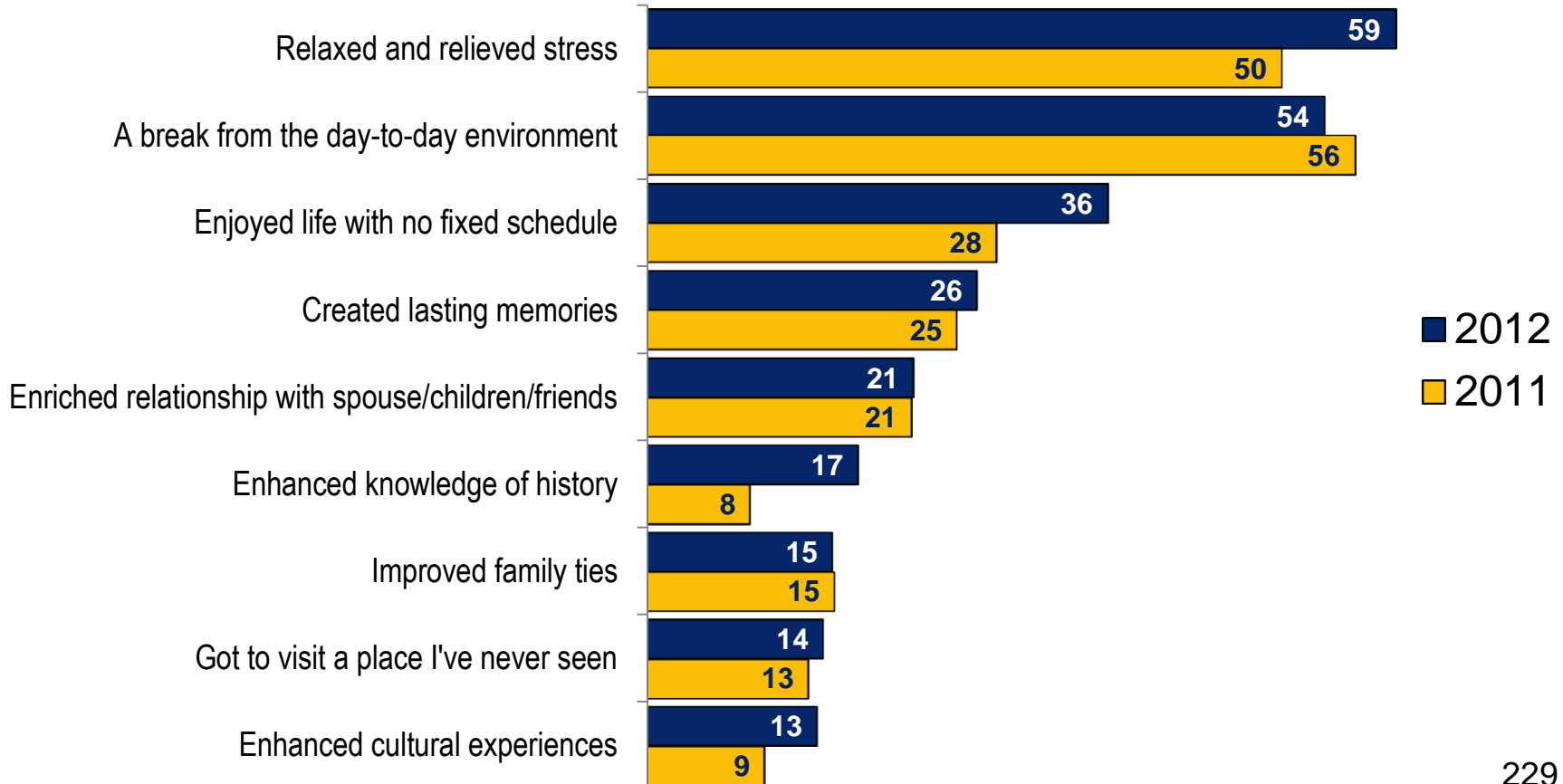
# **Trip Benefits — Marketable Day-Trips**

# Benefits From Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total



# Benefits From Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

