

2011 ANNUAL TRAVEL PROFILE

Dutch Country Roads Region

Research Methodology



The research for this report was conducted by Longwoods International.

The results consist of:

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

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

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

Research Methodology (cont'd)



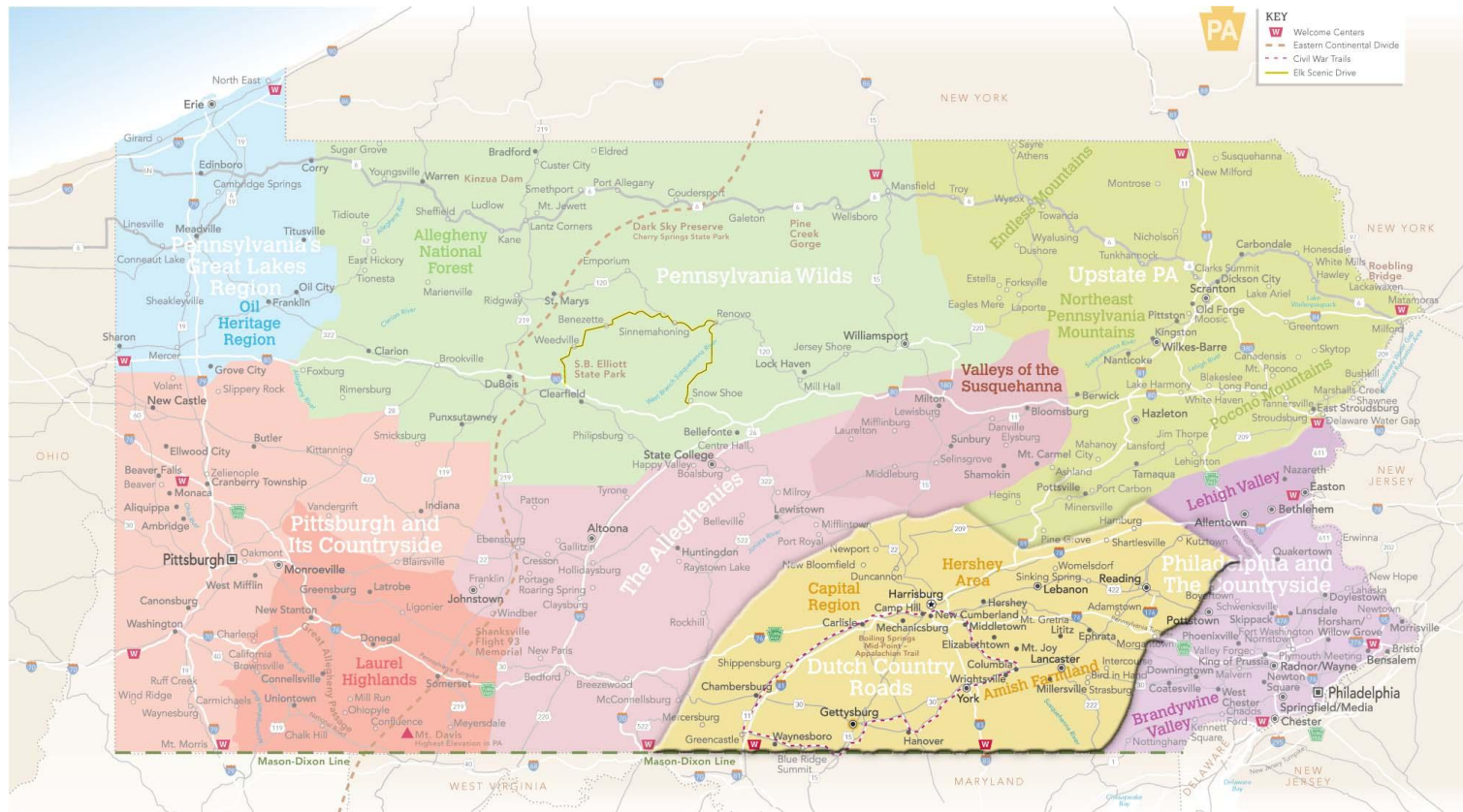
- ⦿ The **Travel USA**[®] program identified 5,790 survey respondents who visited Pennsylvania on an overnight trip and 4,530 on a day-trip in 2011.
- ⦿ A follow-up survey was sent to a representative sample of these visitors to augment the information from **Travel USA**[®], providing more in-depth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

Research Methodology (cont'd)



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

Dutch Country Roads Region

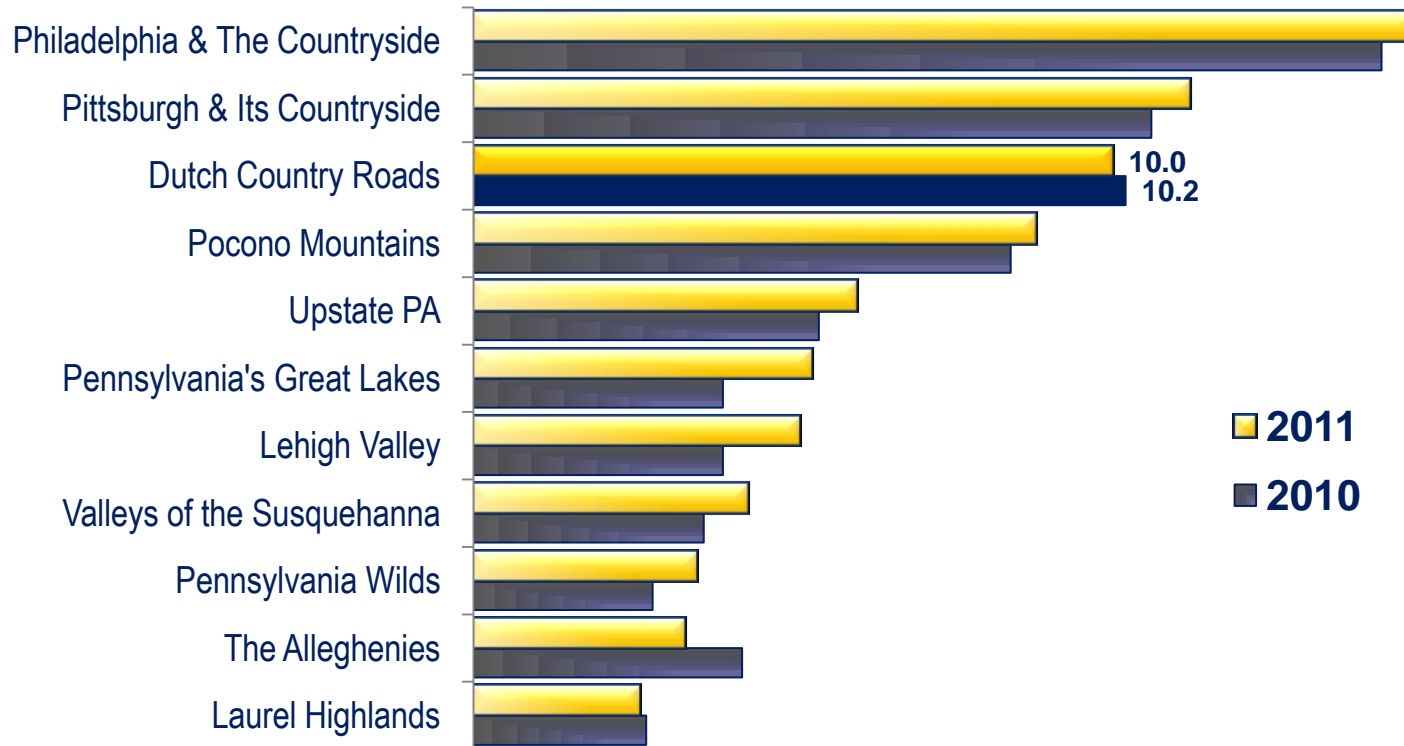


Dutch Country Roads Region Visitor Volume

Region Visited on Overnight Trips*

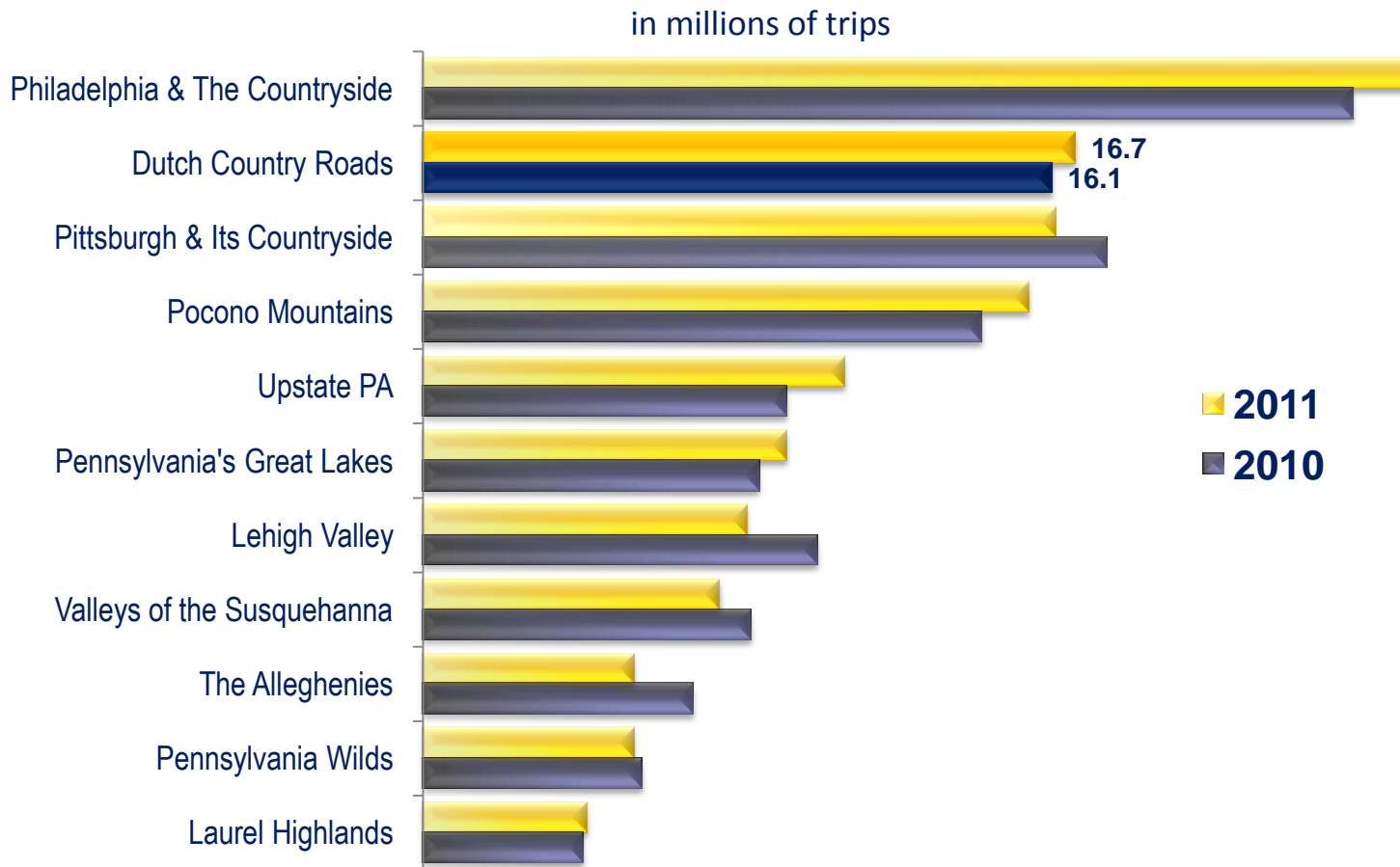


in millions of trips



*Spent time in region
Sum of regions will exceed State total as a number of travelers visited more than one region.

Region Visited on Day Trips*



*Spent time in region
Sum of regions will exceed State total as a number of travelers visited more than one region.

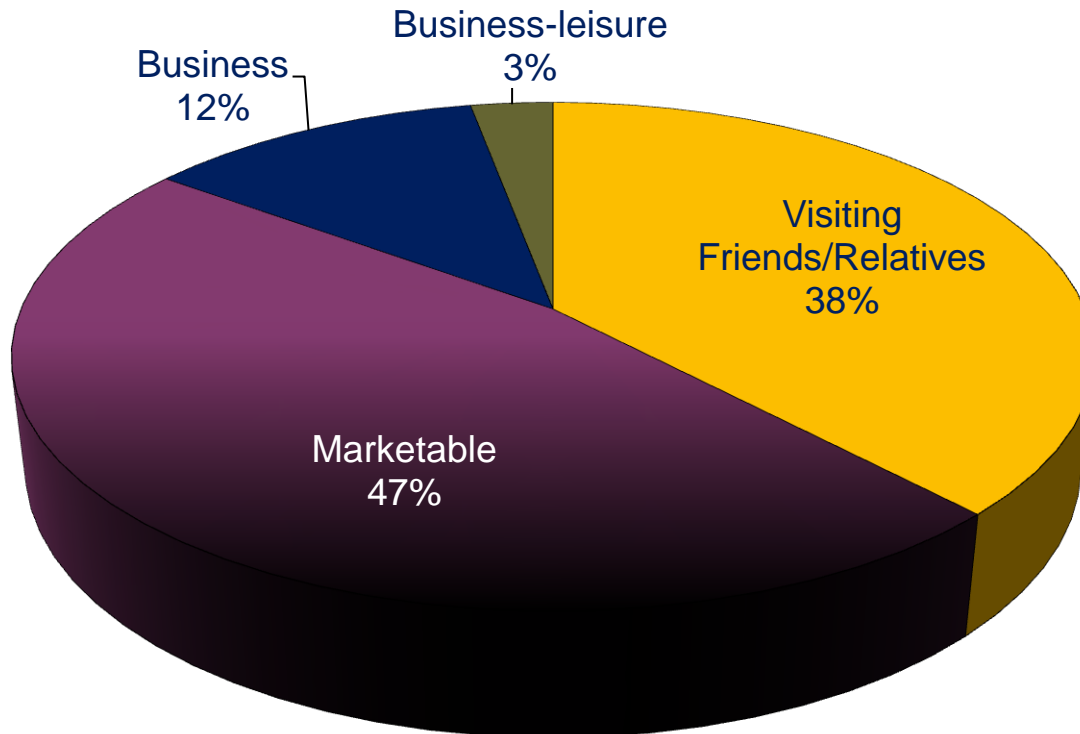
**Dutch Country Roads Region
Main Reason for Trip**

Main Reason for Overnight Trip



Base: Total Overnight Trips

The Dutch Country Roads region had the second highest proportion of overnight travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011.

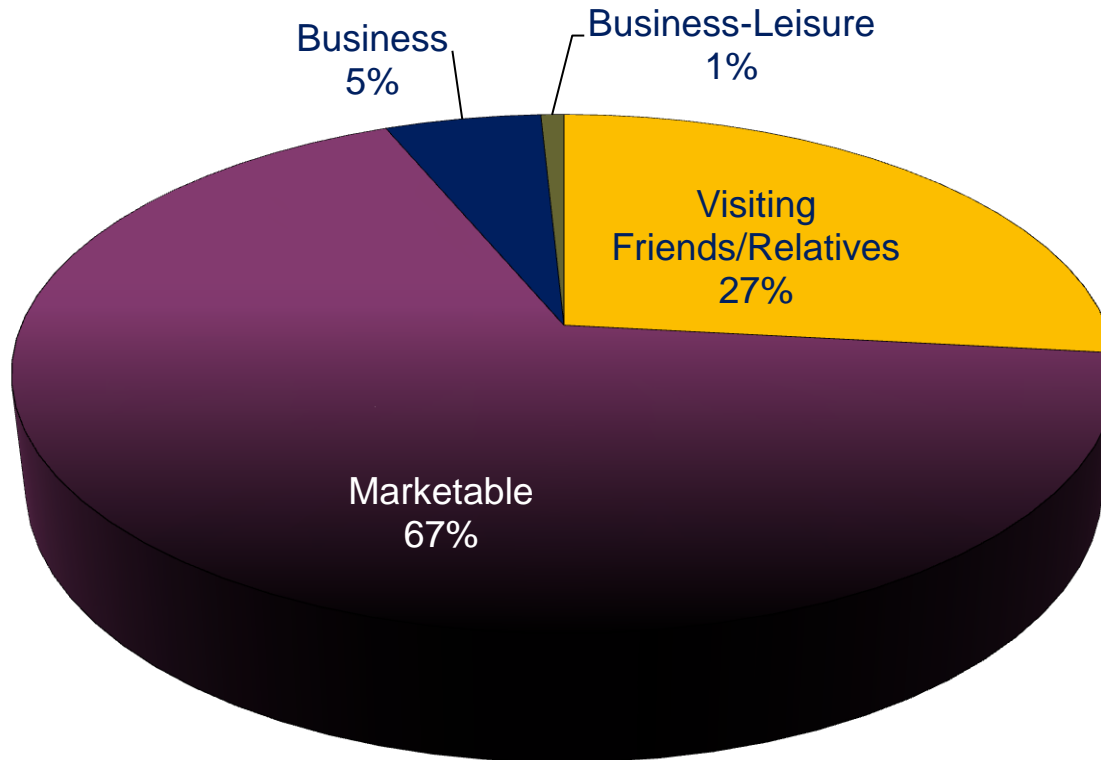


Main Reason for Day-Trip



Base: Total Day-Trips

The Dutch Country Roads region had the highest proportion of day-travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011.

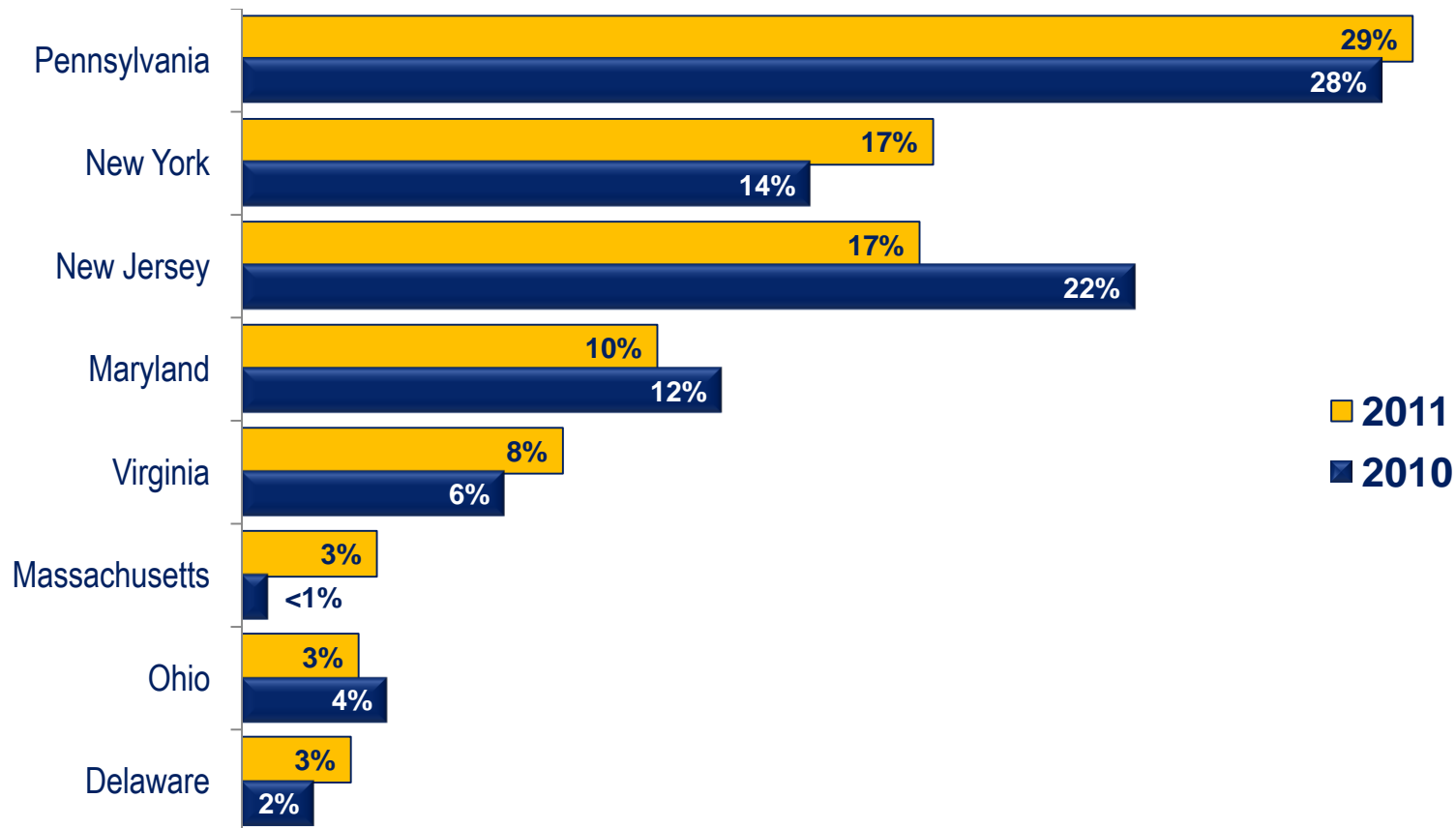


**Dutch Country Roads Region
Main Origin Markets – Marketable
Overnight Leisure Trips**

Main Origin States for Marketable Overnight Leisure Trips



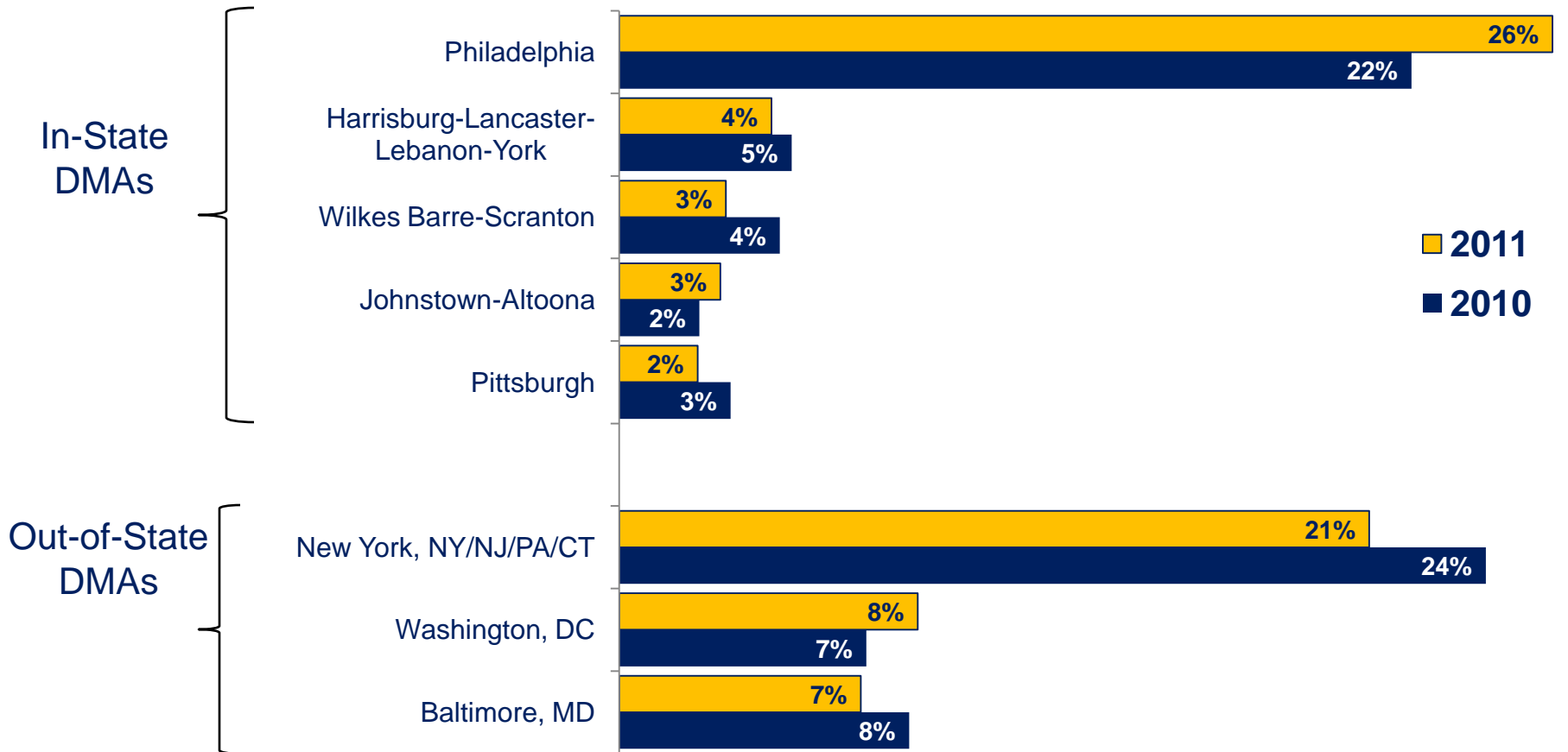
Base: Total Marketable Overnight Leisure Trips



Main Origin Markets for Marketable Overnight Leisure Trips



Base: Total Marketable Overnight Leisure Trips

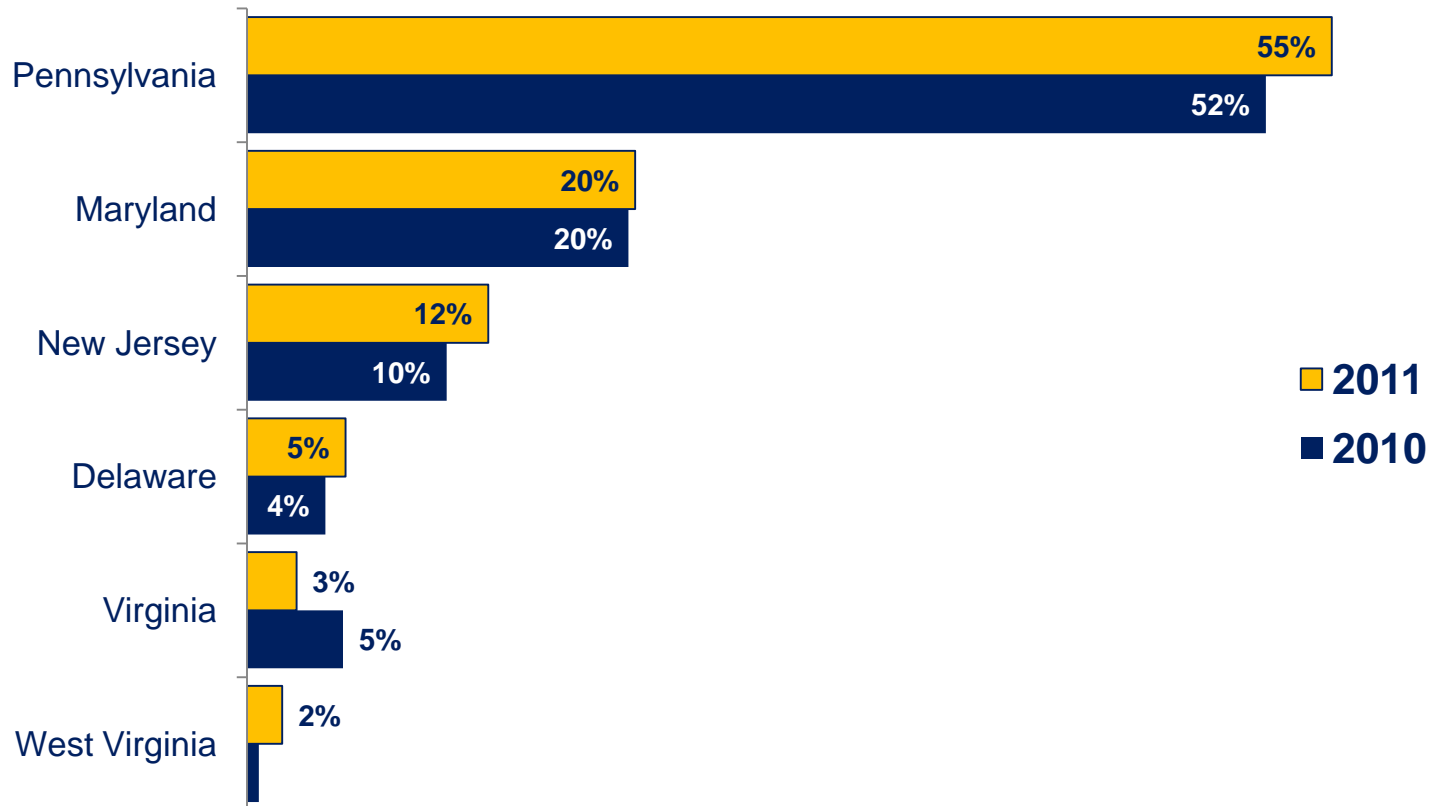


**Dutch Country Roads Region
Origin Markets – Marketable
Leisure Day-Trips**

Main Origin States for Marketable Leisure Day-Trips



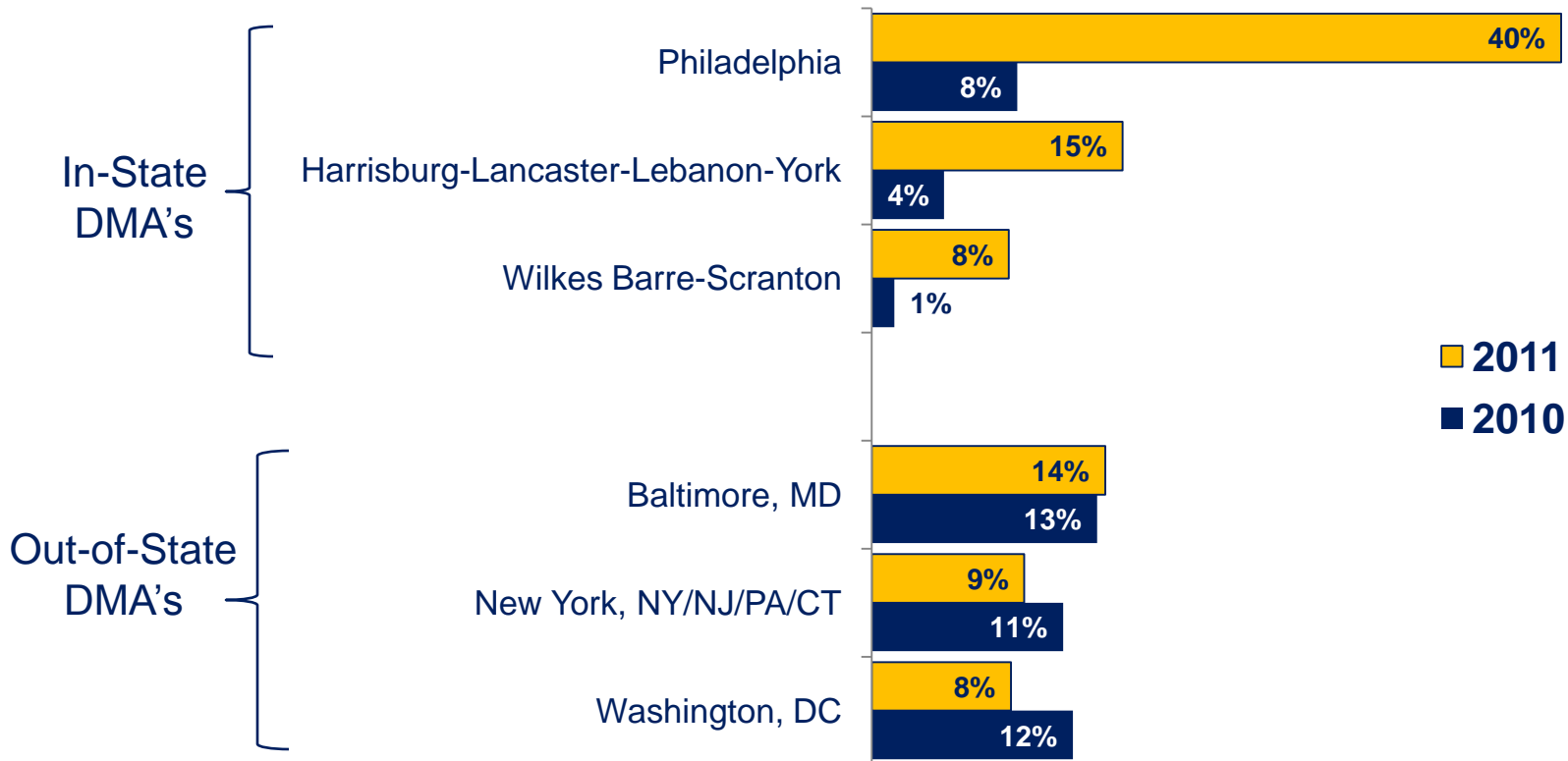
Base: Total Marketable Leisure Day-Trips



Main Urban Origin Markets for Marketable Leisure Day-Trips



Base: Total Marketable Leisure Day-Trips



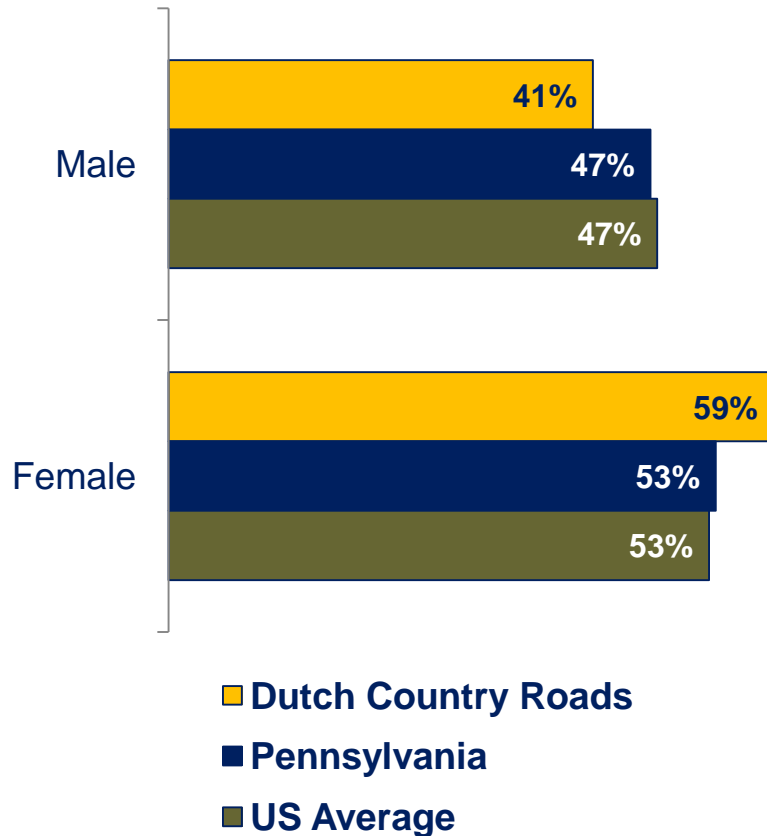
Dutch Country Roads Region Traveler Profile

Gender



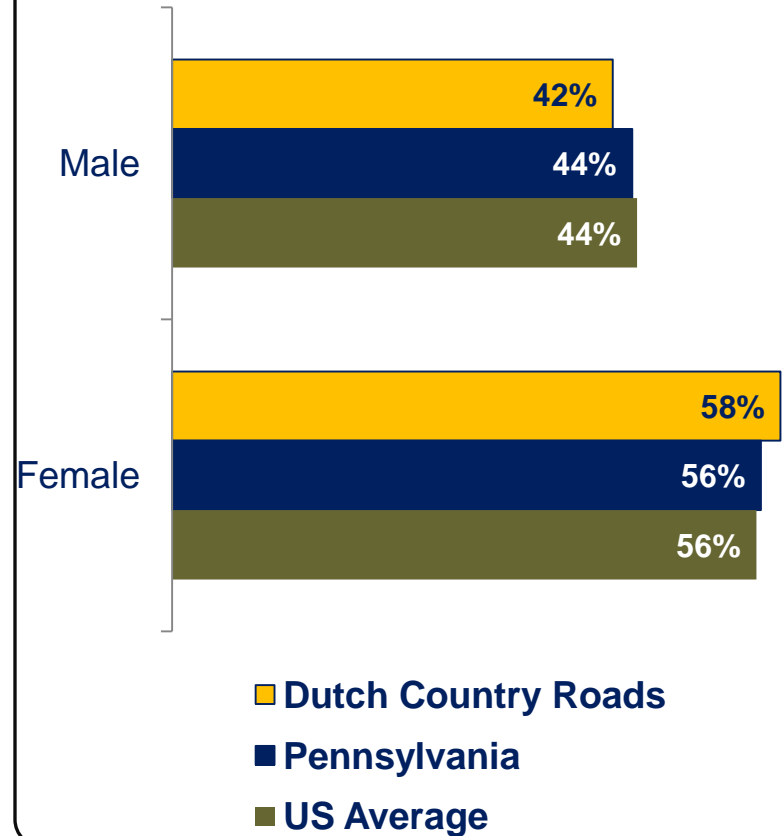
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

Base: Total Marketable Day-Trips

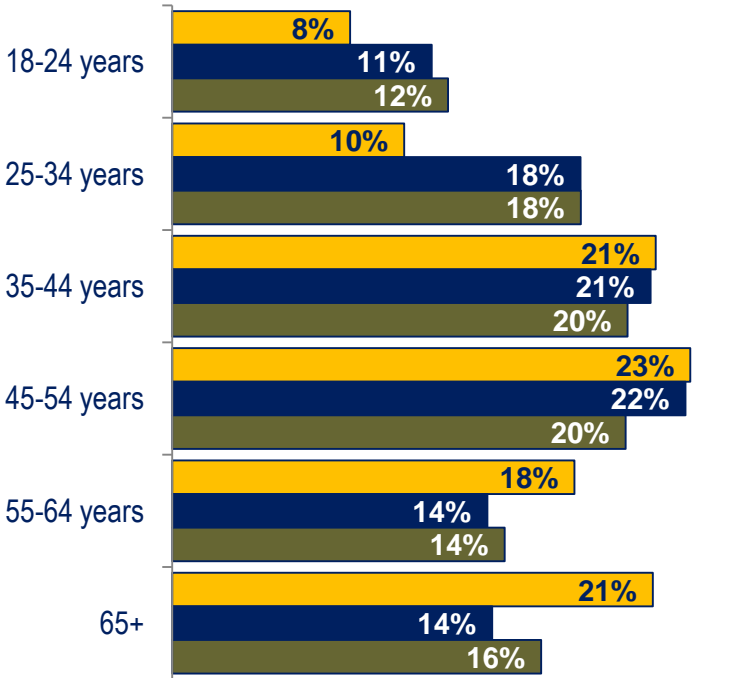


Age



OVERNIGHT

Base: Total Marketable Overnight Trips

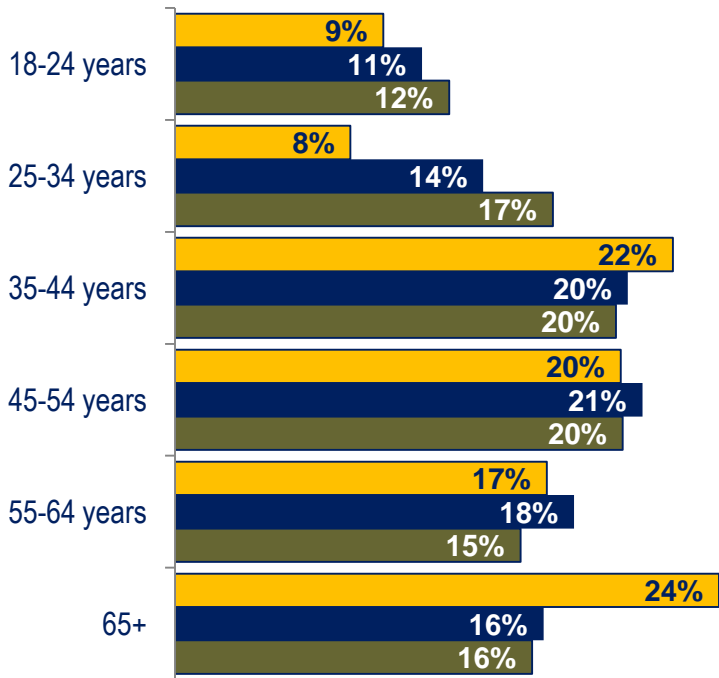


■ Region
■ PA
■ US

Median Age: 50.0 44.9 44.9

DAY-TRIPS

Base: Total Marketable Day-Trips



■ Region
■ PA
■ US

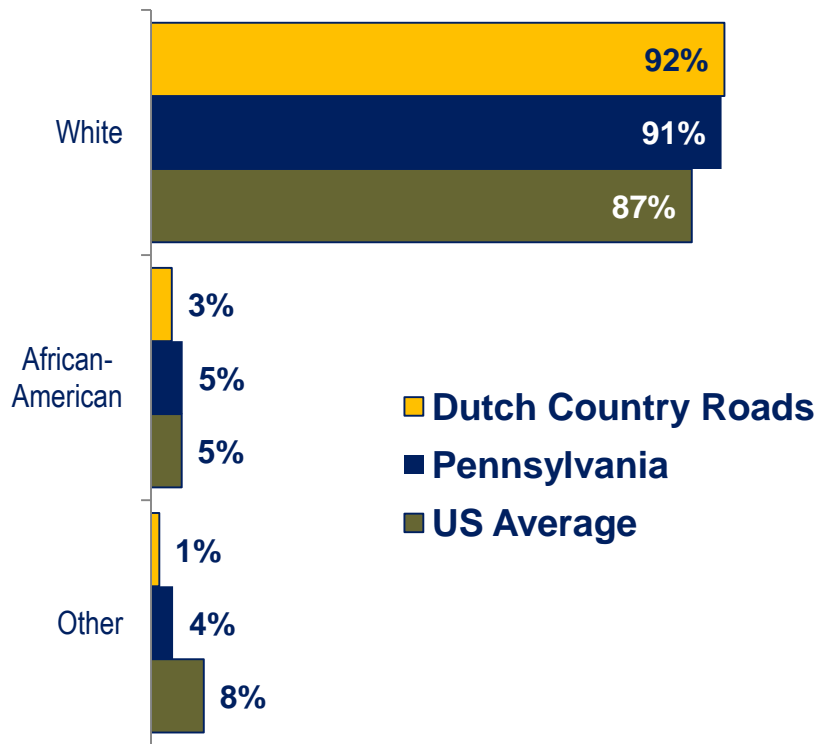
Median Age: 50.4 47.4 45.6

Race



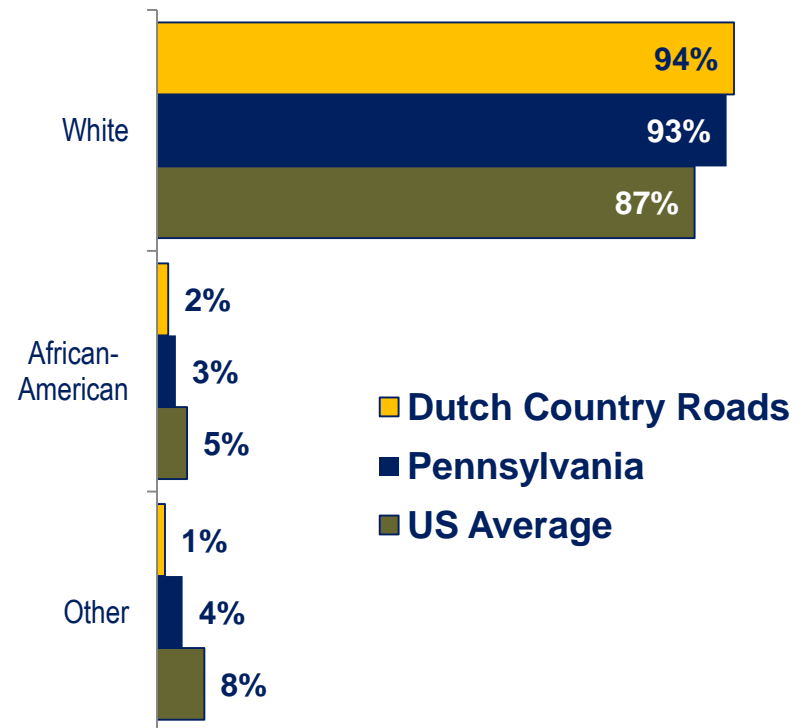
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

Base: Total Marketable Day-Trips

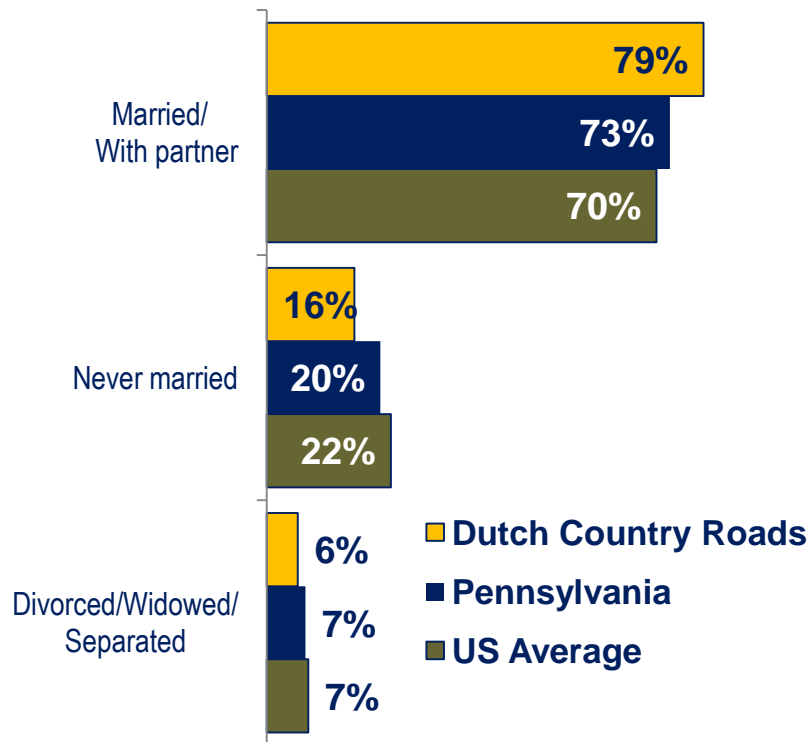


Marital Status



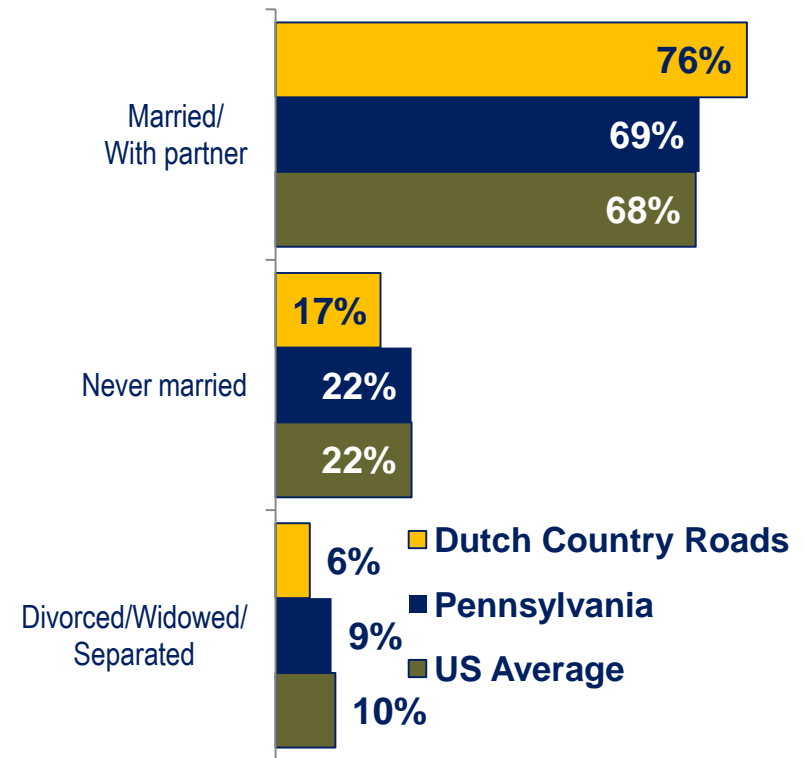
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

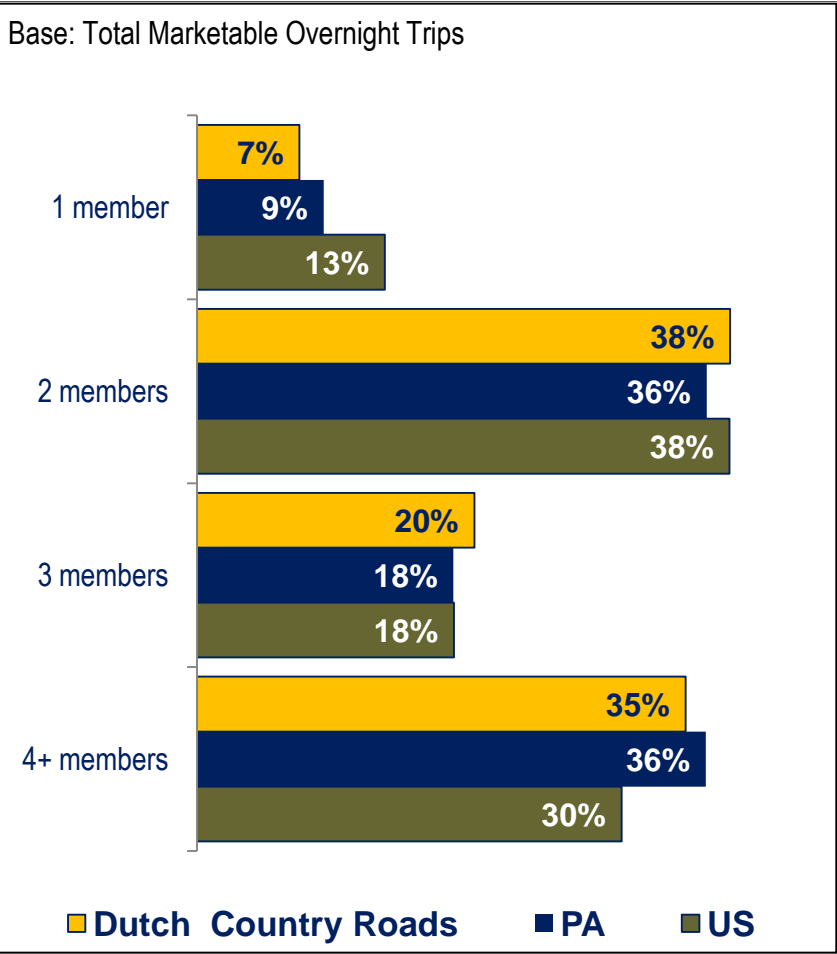
Base: Total Marketable Day-Trips



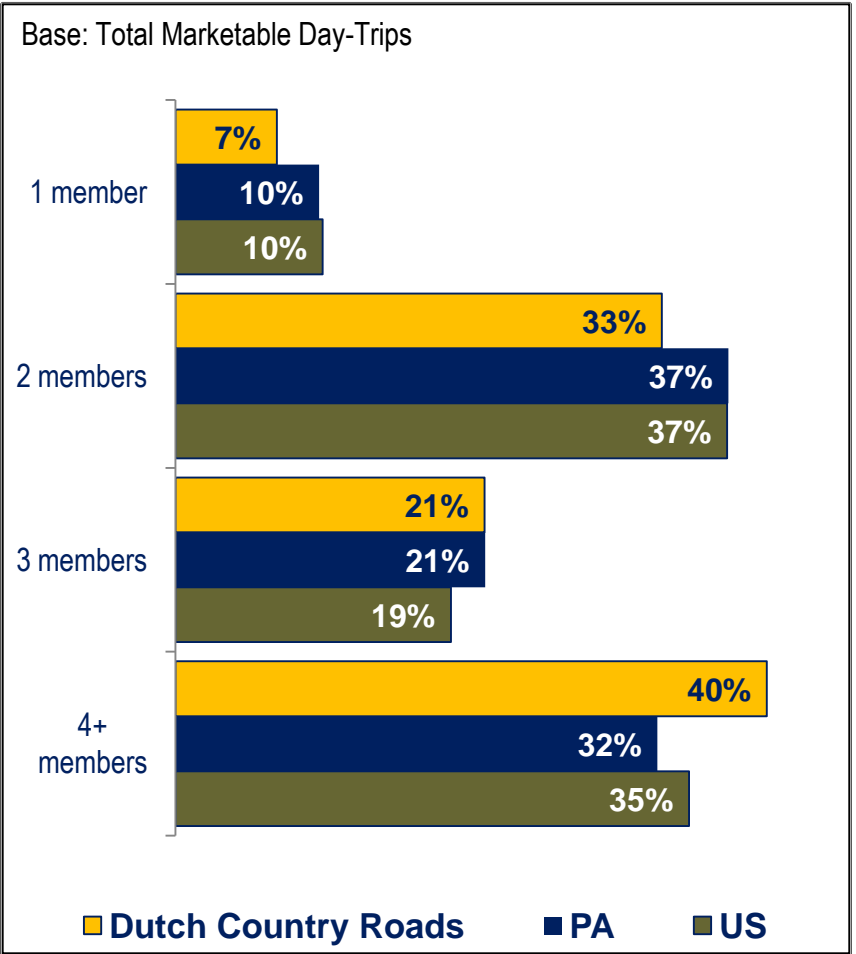
Household Size



OVERNIGHT



DAY-TRIPS

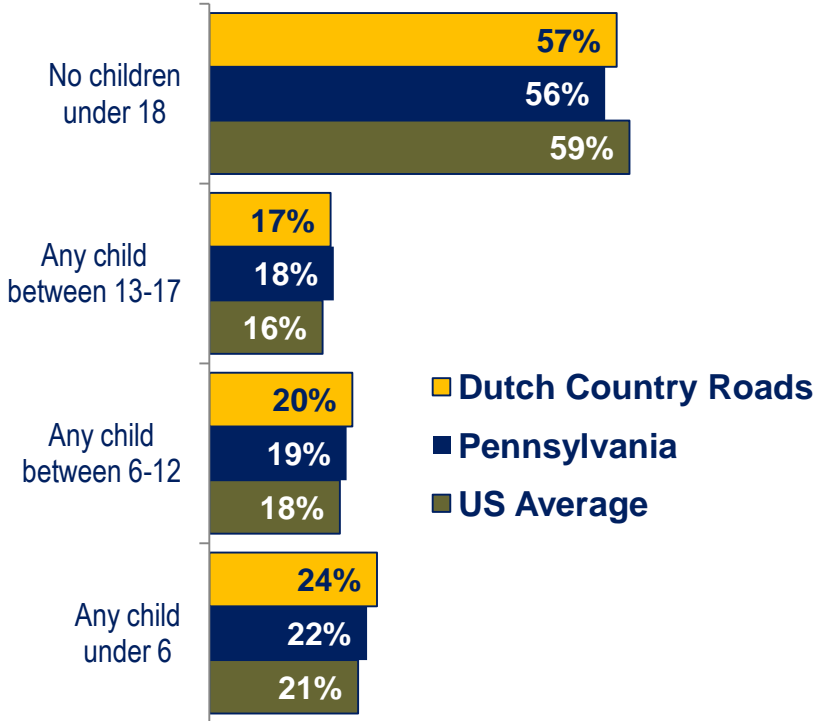


Children in Household



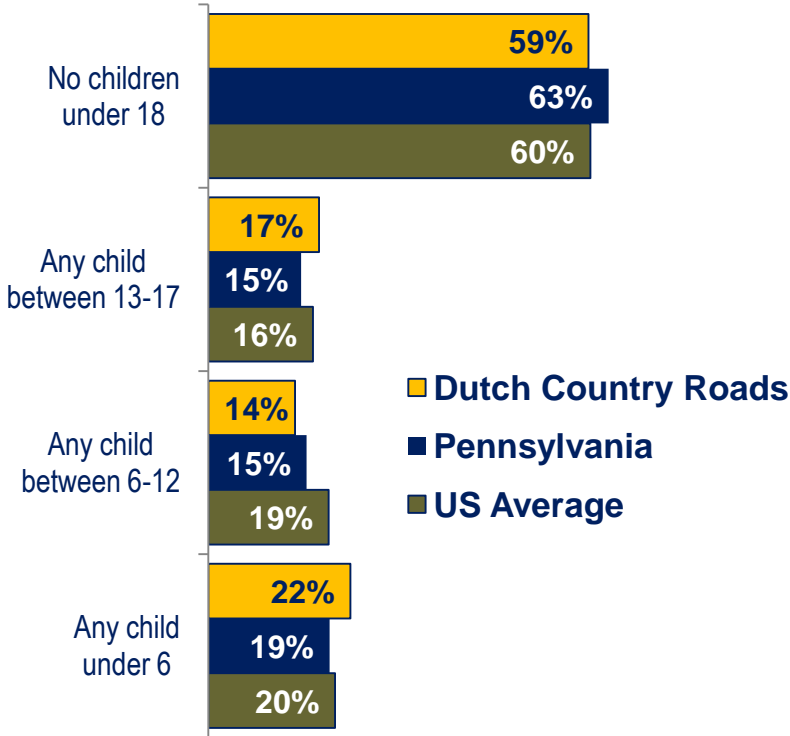
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

Base: Total Marketable Day-Trips

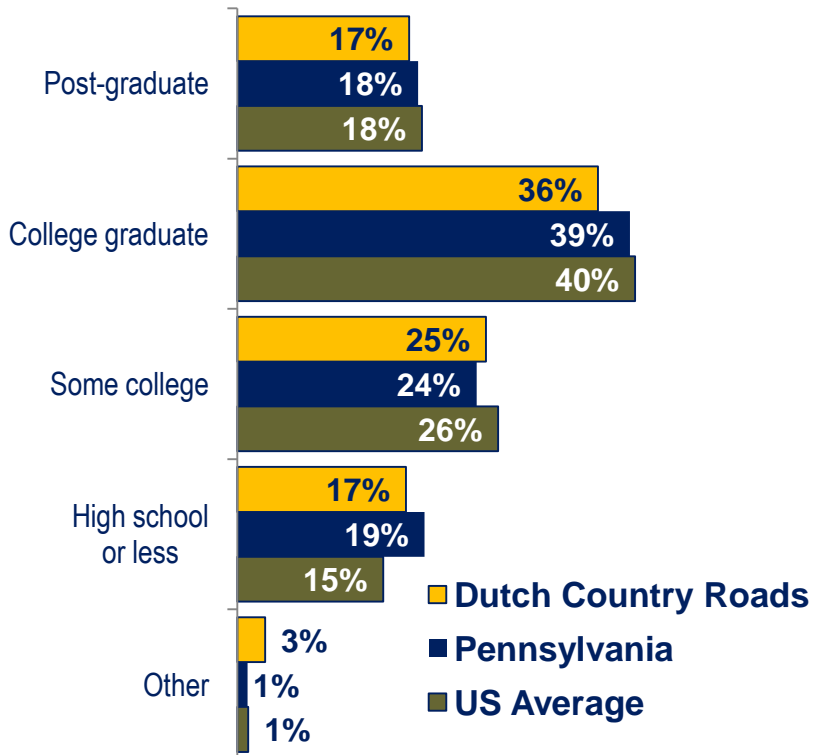


Education



OVERNIGHT

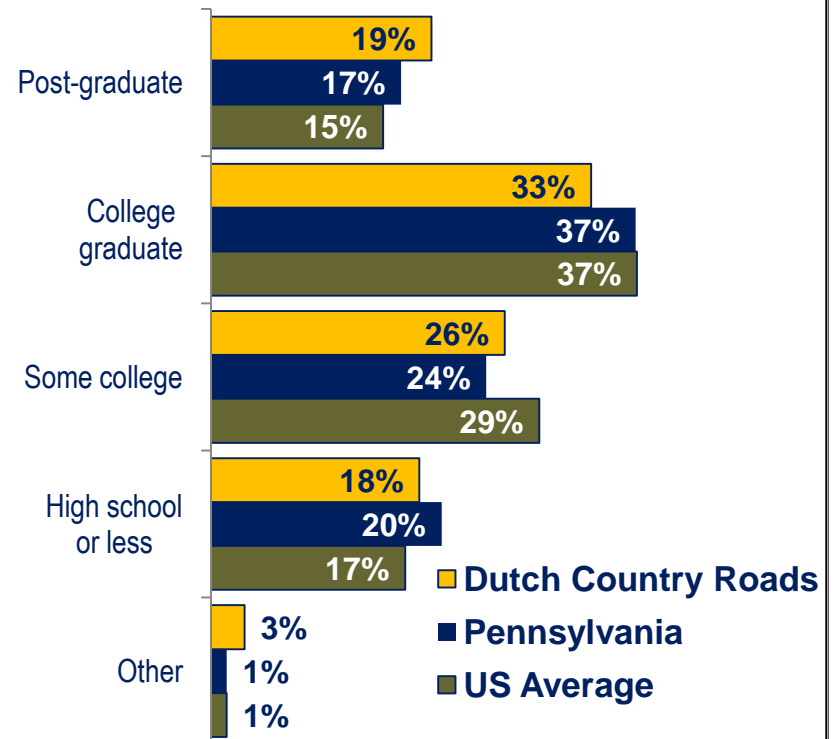
Base: Total Marketable Overnight Trips



College graduate includes both bachelor's and associate's degree holders.

DAY-TRIPS

Base: Total Marketable Day-Trips



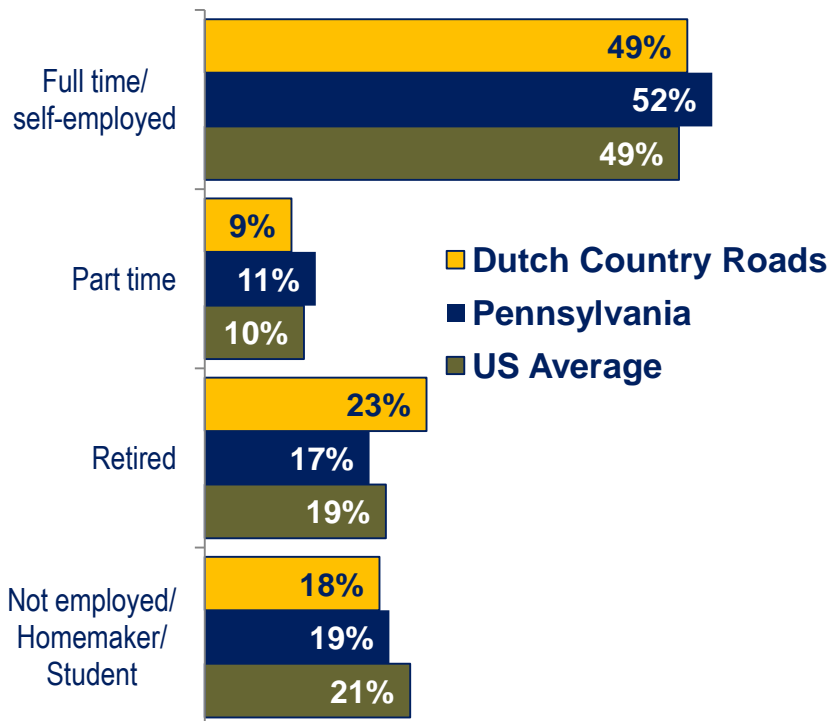
College graduate includes both bachelor's and associate's degree holders.

Employment



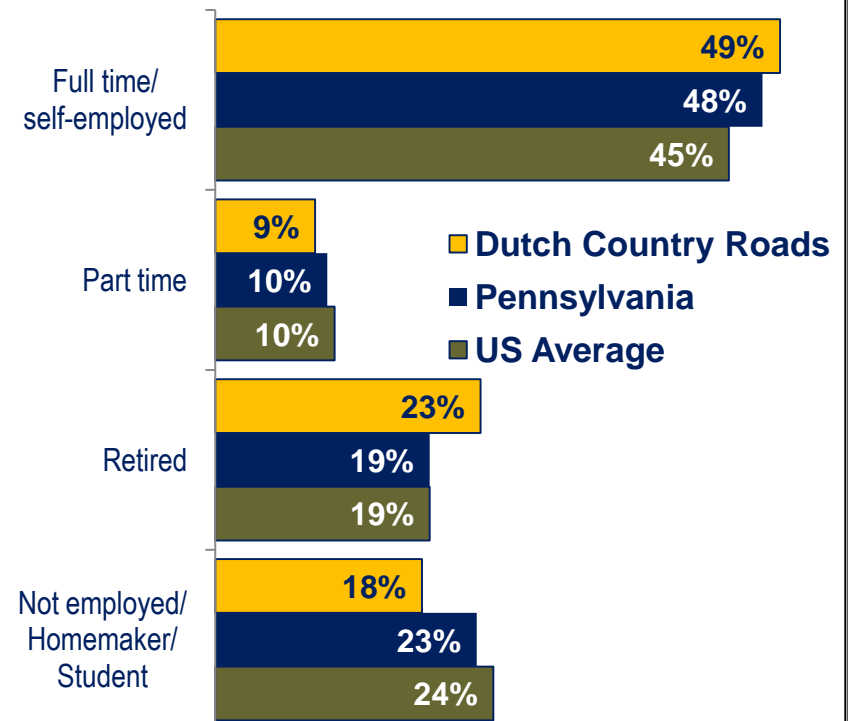
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

Base: Total Marketable Day-Trips

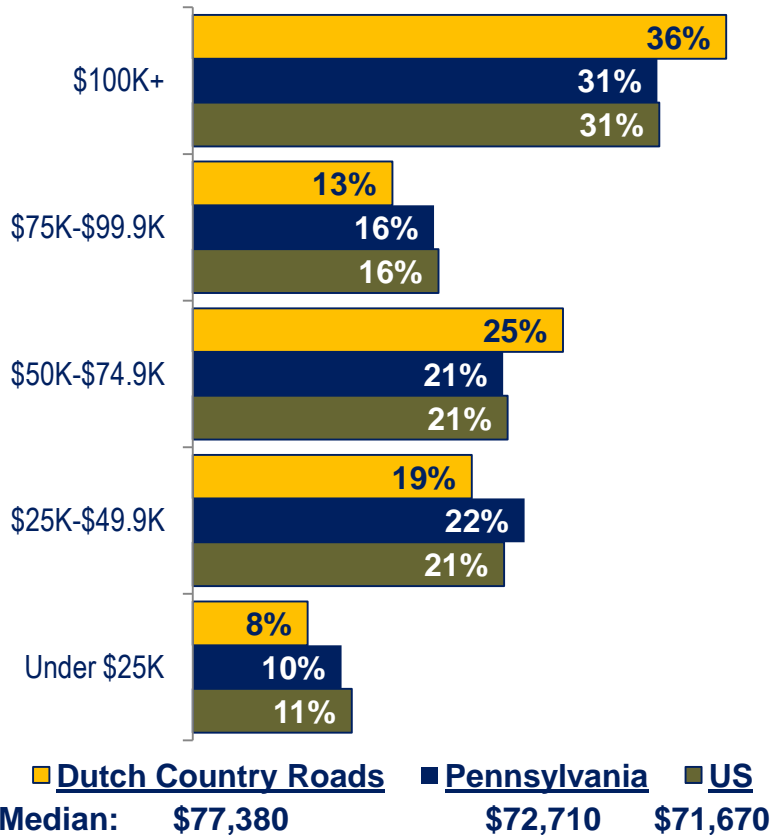


Household Income



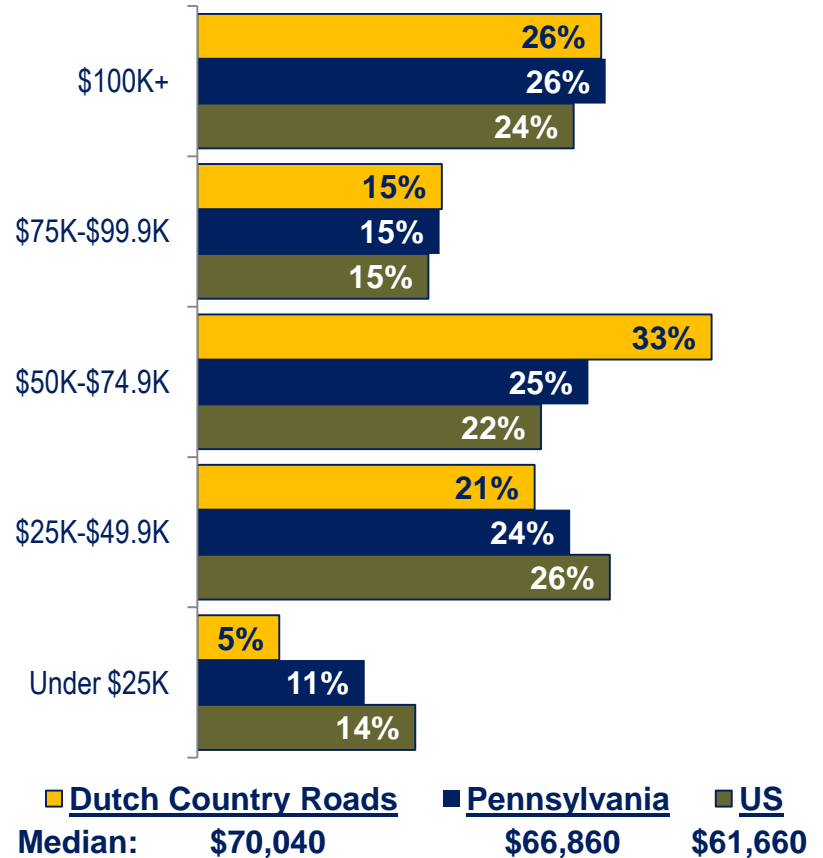
OVERNIGHT

Base: Total Marketable Overnight Trips



DAY-TRIPS

Base: Total Marketable Day-Trips

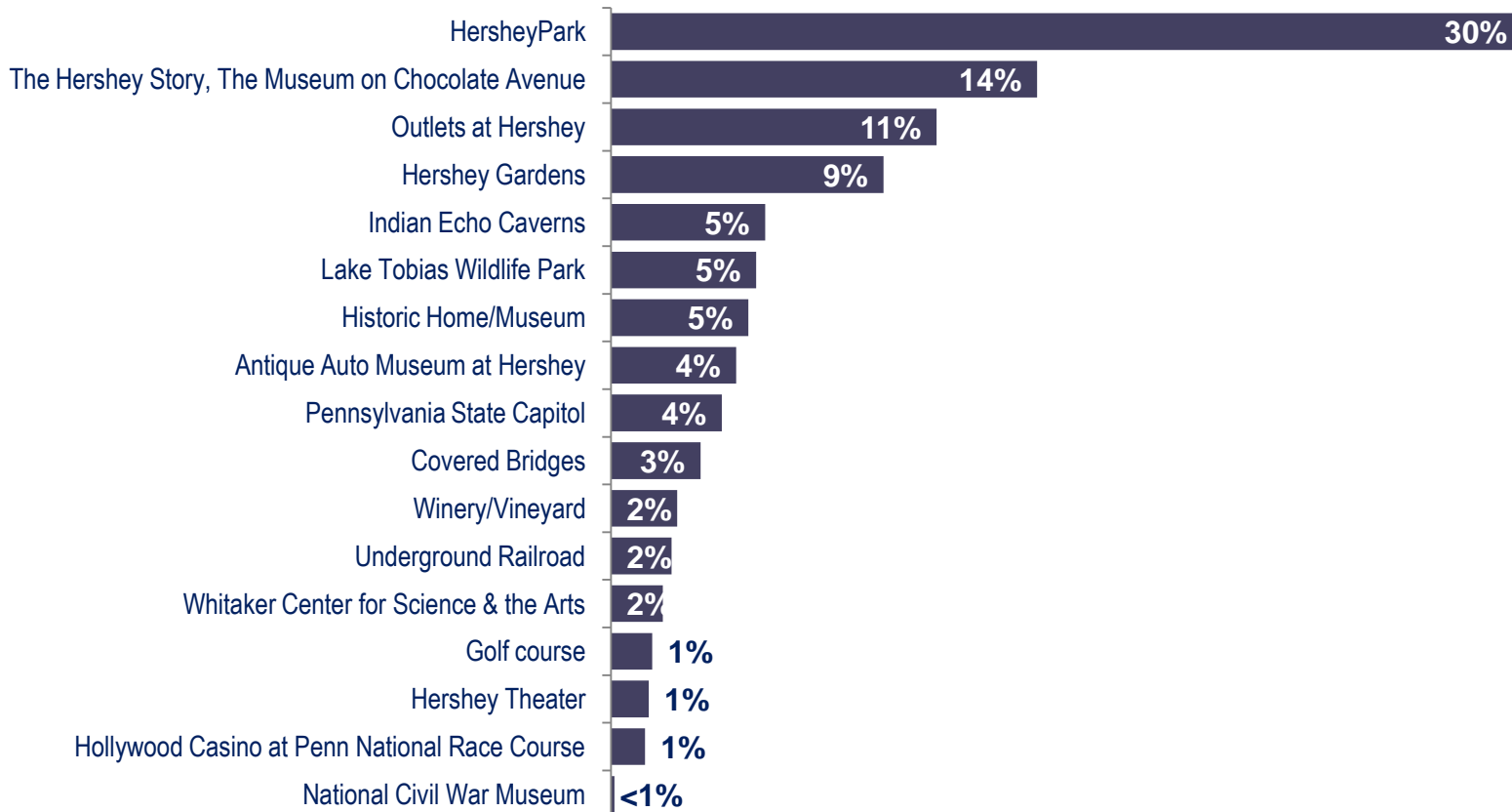


**Dutch Country Roads Region
Attractions Visited
— Overnight Marketable Trips**

Attractions/Events Visited Dutch Country Roads Region*



Base: Overnight Marketable Trips

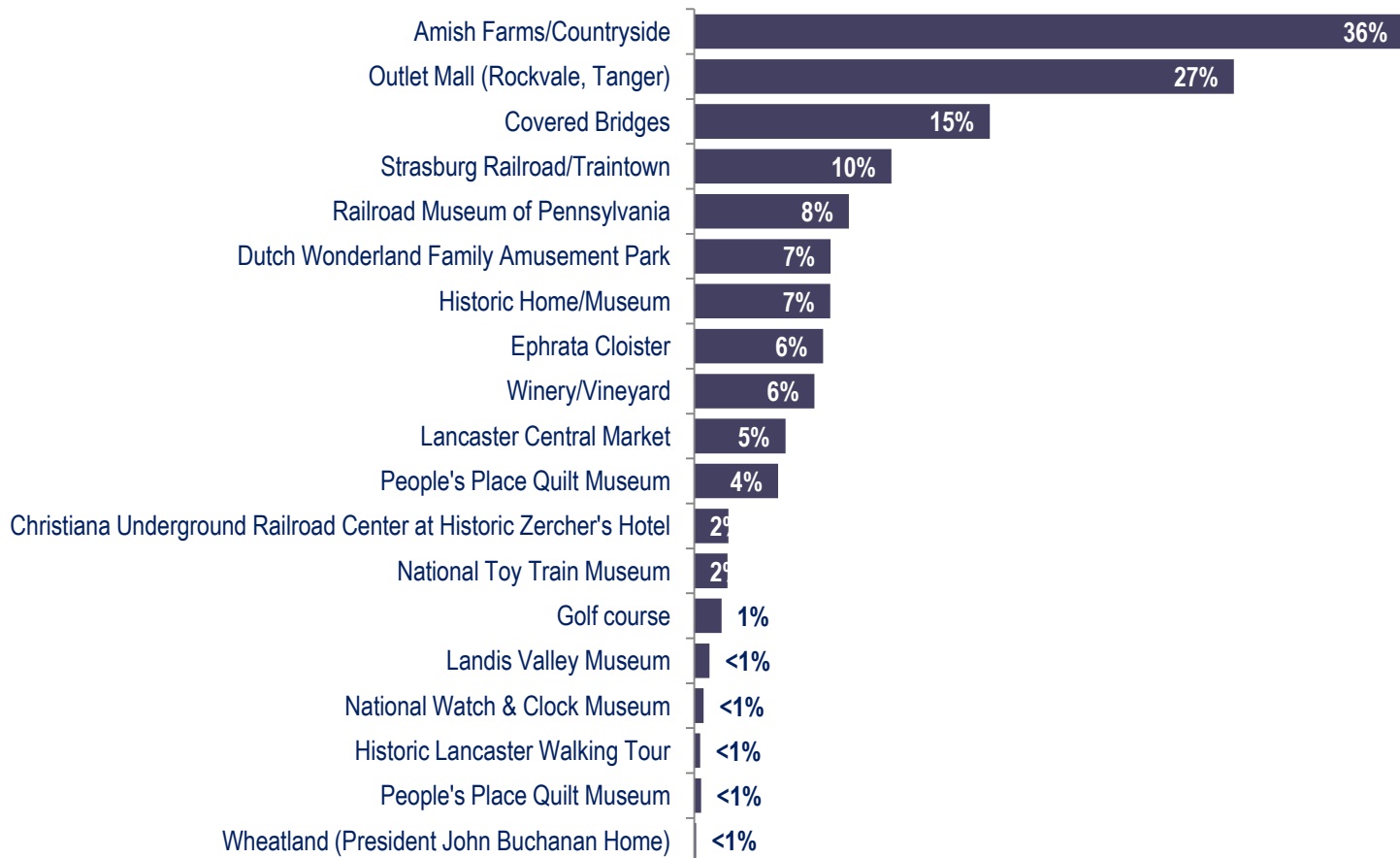


* Harrisburg-Hershey area

Attractions/Events Visited Dutch Country Roads Region*



Base: Overnight Marketable Trips

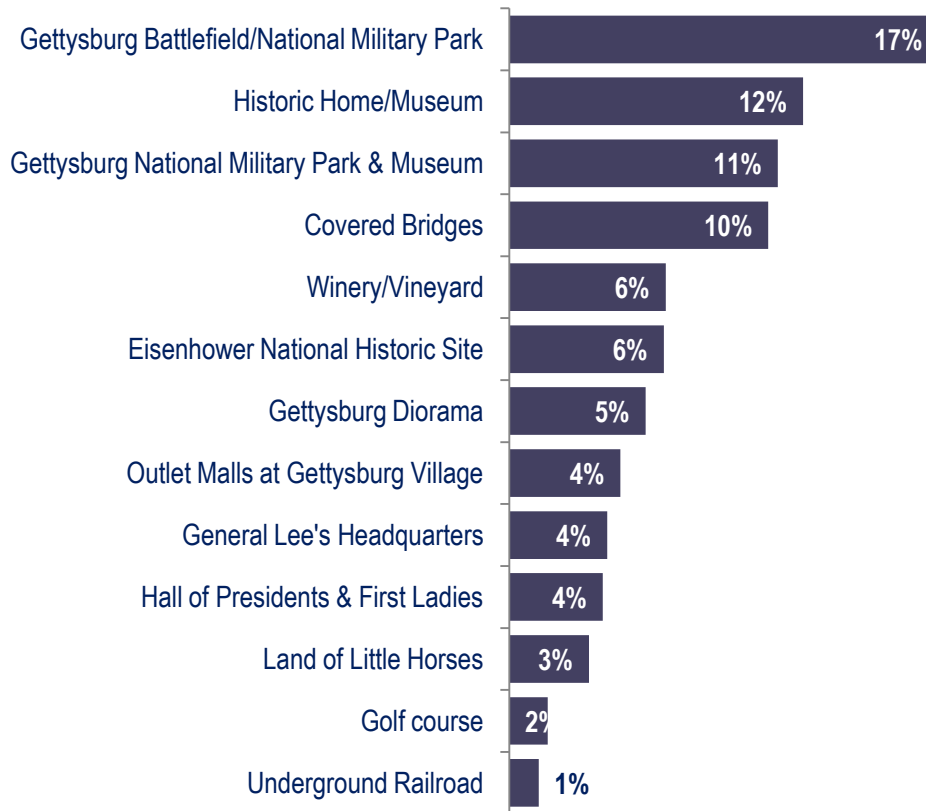


*Lancaster and Amish farmland

Attractions/Events Visited Dutch Country Roads Region*



Base: Overnight Marketable Trips

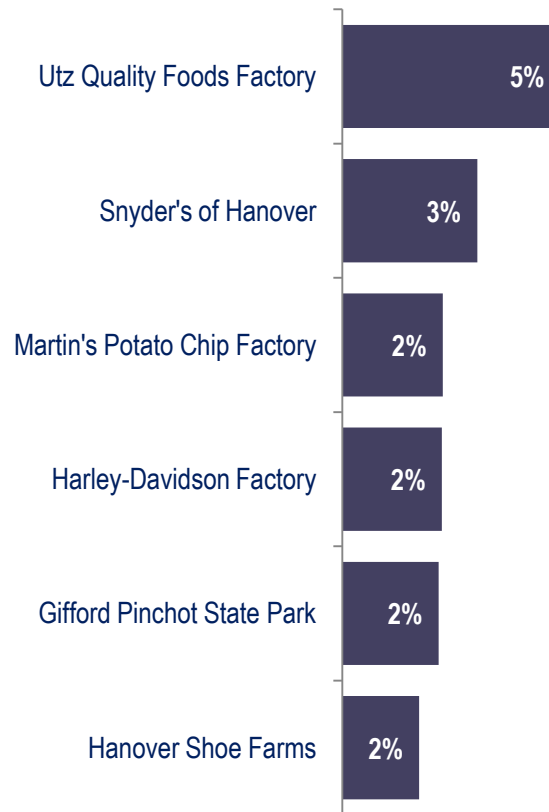


*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum had net attendance of 18%

Attractions/Events Visited Dutch Country Roads Region*



Base: Overnight Marketable Trips

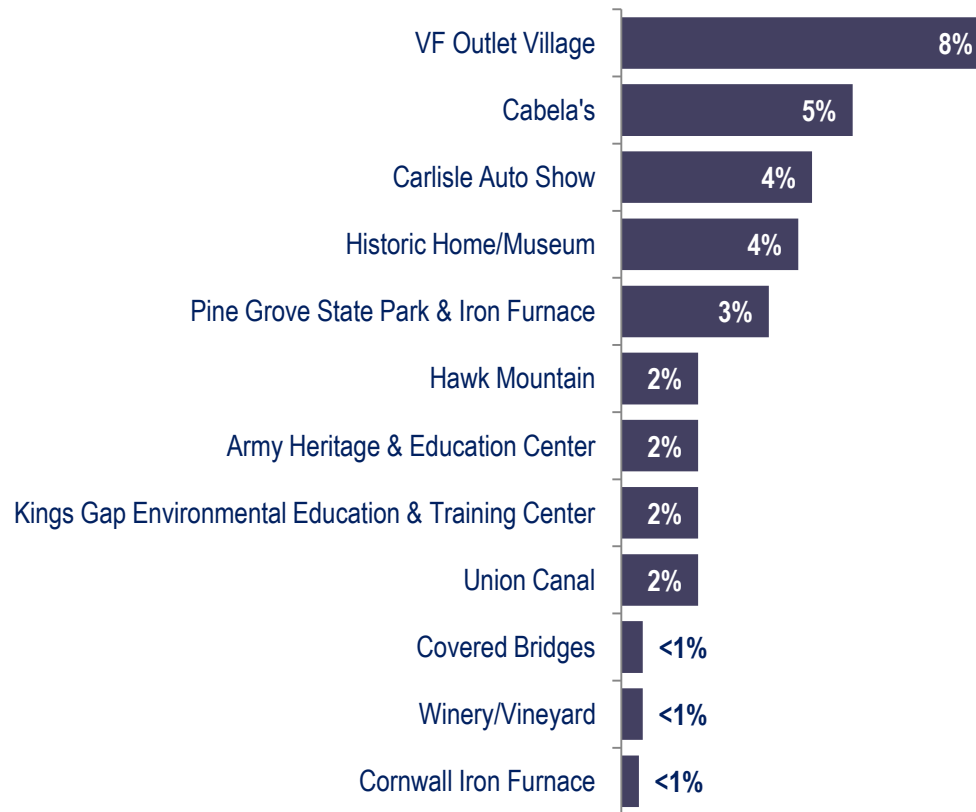


*York Region

Attractions/Events Visited Dutch Country Roads Region*



Base: Overnight Marketable Trips



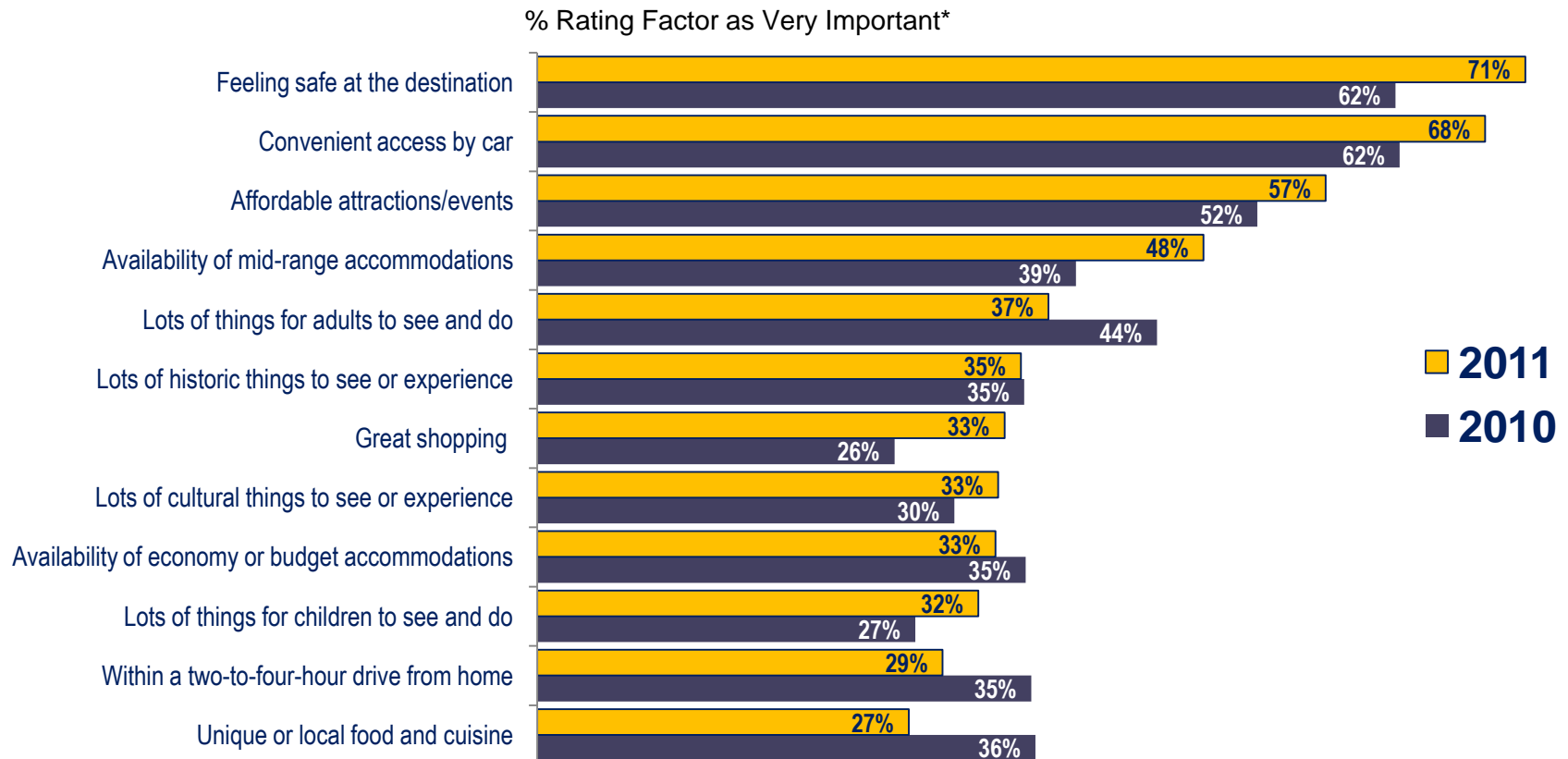
*Remainder of Region

**Dutch Country Roads Region
Importance of Factors
In Choosing to Visit the Region**

Importance of Factors In Choosing to Visit Dutch Country Roads Region



Base: Overnight Marketable Trips

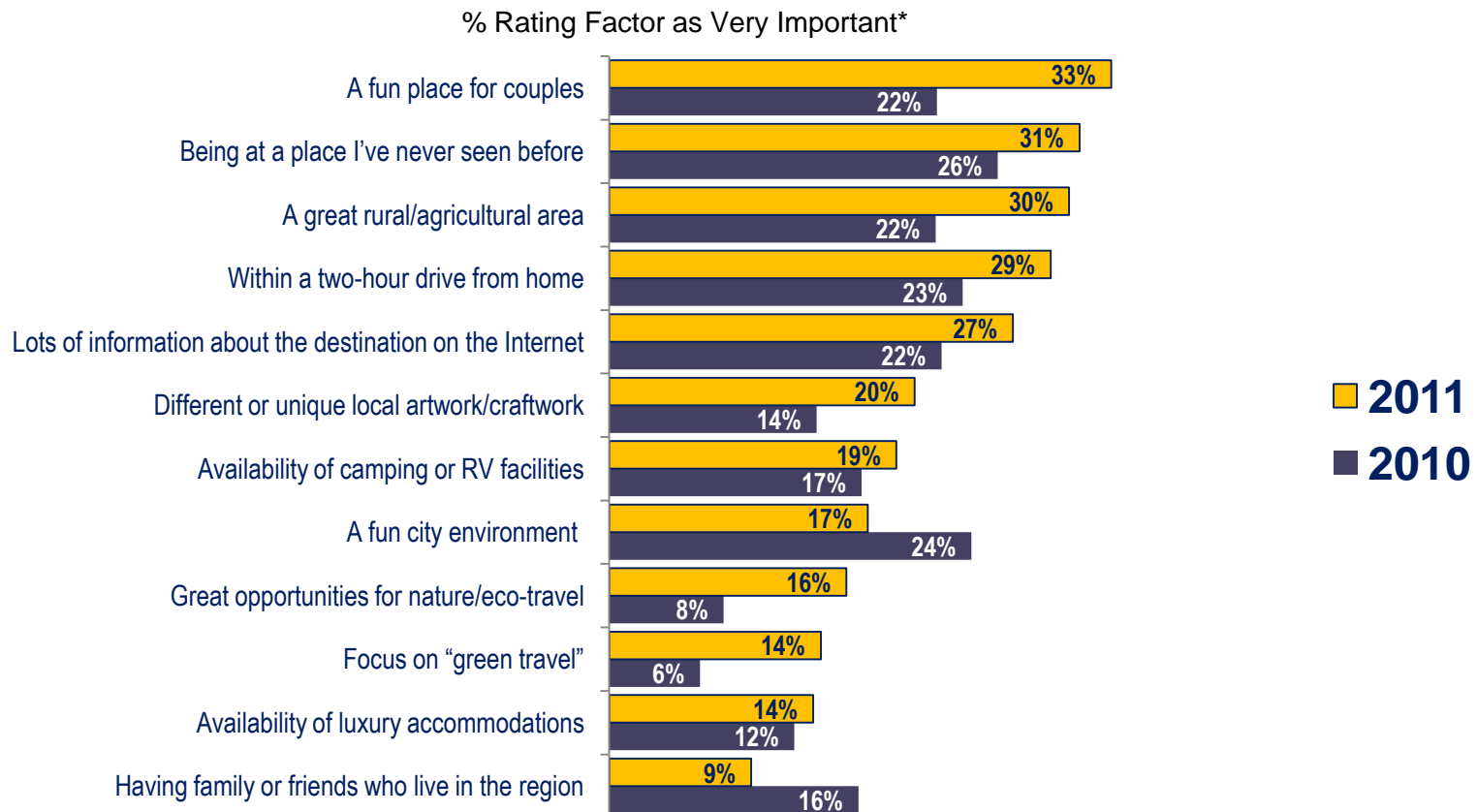


* Rated 8, 9 or 10 on 10-pt. Importance scale

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



Base: Overnight Marketable Trips



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