Pennsylvania’s Annual Traveler Profile 2011 Travel Year

December 2012
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Travel and tourism is an important industry for the commonwealth of Pennsylvania. The state hosted an estimated 181.7 million visitors (as measured in person-trips) in 2011, 62% of whom were residents of other states. The state’s ability to attract travelers from outside the state’s boundaries is directly linked with the amount of money travelers spend in the state and the state and local tax revenues generated from visitor spending since travelers from out-of-state are more likely to stay overnight in paid lodging and spend more than in-state travelers.

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

Pennsylvania ranked 7th among the states in 2011 with a 3.5% market share of US overnight marketable travelers and 3rd in the share (6.4%) of US marketable day-trip travelers. The state’s rankings and market shares of marketable travelers were both down compared to 2010.
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.
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.
 Estimates of Pennsylvania’s overnight and day-trip travel volume are based on a number of sources including Travel USA®, the custom return-to-sample research discussed above, historic data from previous research conducted for the Pennsylvania Tourism Office, and consultations with Tourism Economics, the contractor responsible for Pennsylvania’s annual economic impact of travel and tourism estimates.
Executive Summary

PENNSYLVANIA VISITOR VOLUME

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

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

Pennsylvania hosted an estimated 117.5 million day-trip travelers in 2011, accounting for slightly less than two-thirds of the state total, and essentially unchanged from 2010.

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

PENNSYLVANIA’S MARKET SHARE – Overnight Trips

- Pennsylvania ranked 5th among the states in total overnight leisure travel with a 4.0% market share in 2011, behind California, Florida, Texas, and New York.
- Pennsylvania’s ranking slipped to 7th in terms of marketable overnight travelers in 2011, with a 3.5% market share behind Florida, California, Nevada, New York, Texas, and New Jersey – compared to ranking 6th and a 3.8% market share in 2010.
- Visiting Friends/Relatives (VFR) accounted for 51% of the travelers who took an overnight leisure trip in Pennsylvania in 2011 – a far higher average than the 44% average for the US. Pennsylvania ranked 5th among the states for US overnight VFR travel in 2011 with a 4.6% market share.
- Pennsylvania remained the 7th leading destination state for US overnight business travel behind California, Texas, Florida, Illinois, New York, and Georgia with a 3.7% market share in 2011.
Pennsylvania’s ranking dipped to 3rd behind California and Florida for marketable day-trip leisure travelers in 2011, with the 6.5% market share down slightly from 2010.

Pennsylvania’s day-trip leisure travelers were far less likely to visit friends/relatives (VFR) than overnight travelers, ranking 5th among the states for US day-trip VFR travel and a 5.8% market share in 2011.

Pennsylvania was the 5th leading destination state for US day-trip business travel in 2011 with a 5.0% market share, behind California, Texas, Florida, and New York – down from 4th and a 5.3% market share in 2010.
Executive Summary (cont’d)

ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Ohio, Maryland, and Virginia were among the leading origin markets for Pennsylvania’s marketable overnight and day-trip travelers in 2011, together accounting for 83% and 91%, respectively, of the total.

- Pennsylvania was the top origin market for PA’s leisure travelers accounting for 38% of marketable overnight travelers; 49% of marketable day-trip travelers; 34% of overnight VFR travelers; and 52% of the state’s day-trip VFR travelers.

- Pennsylvania was also the top origin market for PA business overnight travelers, accounting for 33% of the state total, with New York, New Jersey, and Maryland, together accounting for an additional 20%.

- New York was an important origin market for business travelers who combined some leisure travel with their business trip, accounting for 15% of PA’s overnight business-leisure travel segment – second only to PA business travelers (22%).
Executive Summary (cont’d)

PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region had the highest total overnight visitation numbers of the state’s 11 tourism regions, with 14.7 million person-trips in 2011, followed by Pittsburgh and Its Countryside and Dutch Country Roads regions.

- These three regions accounted for nearly half of Pennsylvania’s total overnight person-trips in 2011.

- The Dutch Country Roads region was the state’s leading region for marketable overnight leisure trips, followed by the Pocono Mountains and Philadelphia and the Countryside regions.

- With their relatively large population bases, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions were the leading destinations for the state’s business and VFR (visiting friends and relatives) travel.
Why Pennsylvania?

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

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

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

Advertising influenced 7% of marketable overnight travelers’ decision to visit Pennsylvania, a 5 percentage point increase from 2010.
Planning and Booking by Marketable Overnight Travelers

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

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

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

In terms of the technology used, over half used a desktop computer (51%) to plan their trip. Only 8% used a smartphone to plan their trip, but usage soared to 31% during the trip.
Use of Social Media by Pennsylvania’s Marketable Overnight Travelers

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

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

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

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

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

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

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

Pennsylvania is largely a “drive-to” destination, with 93% of the state’s marketable overnight travelers from out of state arriving by car, van, truck, or RV in 2011. Short stays were the norm for the majority of marketable overnight travelers in 2010, with nearly two-thirds (64%) staying just one or two nights on their Pennsylvania trip in 2010 – a far higher percentage than the 55% US average.

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

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

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

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

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

Not surprisingly, Pennsylvania’s resident travelers viewed the state more favorably on each of the priorities than non-resident travelers who visited the state.
Benefits from a Pennsylvania Overnight or Day Trip

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

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

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

DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

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

- Pennsylvania’s marketable overnight travelers had a median age of 44.9 years, matching the US average, and below the median age of the state’s marketable day-trip travelers (47.4 years).

- The majority were married or with a partner (73%) – slightly above the US average of 70% and that of marketable day-trip travelers (69%).

- A small majority (56%) also had no children under 18 years of age living at home – a proportion well below that of the state’s marketable day-trip travelers (63%).

- The median household income of the state’s marketable overnight travelers was $72,710, with roughly a quarter (27%) with an annual household income of at least $100,000. The median household income of the state’s marketable day-trip travelers was lower than the state’s overnight travel segment at $66,860.
DEMOGRAPHIC CHARACTERISTICS BY AGE OF TRAVELER

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

- Pennsylvania’s marketable overnight travelers under the age of 45 were more likely to hold at least an associate’s degree than those 45 years of age or older, i.e., 67% vs 58%, respectively.

- The proportion of travelers with children under 18 years of age differed markedly based on the age of the traveler:

<table>
<thead>
<tr>
<th>Traveler’s Age</th>
<th>Percent With Children Under Age 18</th>
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</thead>
<tbody>
<tr>
<td>25-34</td>
<td>45%</td>
</tr>
<tr>
<td>35-44</td>
<td>51%</td>
</tr>
<tr>
<td>45-54</td>
<td>75%</td>
</tr>
<tr>
<td>55-64</td>
<td>6%</td>
</tr>
</tbody>
</table>
Executive Summary (cont’d)

HOUSEHOLD INCOME BY AGE

Income also shows a differentiation based on age.

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

Marital Status by Age

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

- Pennsylvania’s marketable overnight travelers in the youngest age group (18-24) were overwhelmingly single (78%).
- There was a distinct shift to married (47%) or with partner (15%) for the 25-34 age group, but with roughly a third still reporting as single.
- The vast majority of the state’s marketable overnight travelers in the 45-54 and 55-64 age ranges were married/living with a partner (~80% for each group).
- The vast majority (85%) of travelers in the 65+ age group were married or living with a partner – the highest proportion of any age group.
Detailed Findings
Size & Structure of US Overnight Travel Market
Overnight travel by Americans increased by 3% in 2011 vs. 2010.

Of the almost 1.4 billion trips taken, 80% were adults and 88% were taken for leisure purposes.

Approximately half of the leisure trips were for the purpose of visiting friends and relatives, approximately 4% were business leisure trips and about 40% were of a trip type that can be influenced by marketing.

The top six marketable trip types were special event travel, touring trips, outdoor trips, casino trips, resort trips and city trips.
Size of the US Overnight Travel Market 2009 to 2011

Base: Total Overnight Trips

In millions of Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips</th>
<th>Change</th>
<th>Percentage</th>
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<tr>
<td>2009</td>
<td>1,311</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>1,367</td>
<td>+4 %</td>
<td>+4 %</td>
</tr>
<tr>
<td>2011</td>
<td>1,413</td>
<td></td>
<td>+3 %</td>
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</table>
Structure of the US Overnight Travel Market — Trends

Base: Overnight Trips

Percent of Total

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<th></th>
</tr>
</thead>
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<td>Visiting friends/relatives</td>
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<td>43</td>
<td>43</td>
<td>42</td>
</tr>
<tr>
<td>Marketable</td>
<td>43</td>
<td>44</td>
<td>45</td>
<td>44</td>
<td>43</td>
</tr>
<tr>
<td>Business</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>13</td>
<td>15</td>
</tr>
</tbody>
</table>

Business-Leisure trips are included in Marketable trips in this slide.
US Overnight Market Segments

Base: Adult Overnight Trips

- Visits to Friends/Relatives: 44%
- Marketable Leisure: 40%
- Business: 12%
- Business-Leisure: 4%
Main Purpose of US Overnight Trips in 2011

- Visiting friends/relatives: 44%
- Special event: 8%
- Touring: 8%
- Outdoors: 6%
- Casino: 5%
- Resort: 4%
- City trip: 4%
- Theme park: 3%
- Cruise: 1%
- Skiing/snowboarding: <1%
- Golf: <1%
- Other business trip: 8%
- Conference/Convention: 4%
- Business-Leisure: 4%

Base: Adult Overnight Trips
Size & Structure of Pennsylvania’s Travel Market
We estimate that 181.7 million trips were taken to and in Pennsylvania by Americans in 2011:

35% were overnight trips and 65% were day trips

Of the 64.2 million overnight trips:

- 35% were marketable trip types (somewhat less than the national norms).
  - Marketable trip types are trips that can be influenced by marketing, or, in other words, leisure trips excluding visits to friends and relatives.

Key marketable trip types for Pennsylvania included special events, touring and outdoors.
Pennsylvania Day Travelers

- Of the estimated 117.5 million day travelers to and in Pennsylvania:
  - 56% were marketable trip types (a much higher percentage than we saw in overnight travel).
- Key marketable day trip types included special events, shopping, and touring.
Total Trips to Pennsylvania in 2011

Total Person-Trips = 181.7 Million

Day Trips
117.5 Million

Overnight Trips
64.2 Million

35%

65%
Pennsylvania’s Overnight Trip Market Segments

Base: Adult Overnight Trips to Pennsylvania

- **Visits to Friends/Relatives**: 51%
- **Marketable Leisure**: 35%
- **Business**: 12%
- **Business-Leisure**: 2%
Pennsylvania’s Leisure Overnight Travelers
Purpose of Stay by Age of Adult Traveler

Base: Adult Overnight Trips to Pennsylvania

Travelers in the 35-54 age cohorts are more likely to travel for marketable leisure purposes, younger and older travelers are far more likely to visit friends/family.
Pennsylvania’s Overnight Trip Market Segments by Presence of Children in Household

Base: Adult Overnight Trips to Pennsylvania

- **Visiting Friends/Relatives**
  - Any Children: 45%
  - No Children Under 18: 55%

- **Marketable Leisure**
  - Any Children: 41%
  - No Children Under 18: 31%

- **Business**
  - Any Children: 12%
  - No Children Under 18: 12%

- **Business-Leisure**
  - Any Children: 2%
  - No Children Under 18: 3%
Main Purpose of Overnight Trips to Pennsylvania in 2011

Base: Adult Overnight Trips

Marketable Trips

- Visiting friends/relatives: 51%
- Special event: 9%
- Touring: 8%
- Outdoors: 6%
- Theme park: 3%
- Casino: 3%
- City trip: 2%
- Resort: 2%
- Skiing/snowboarding: <1%
- Conference/Convention: 4%
- Other business trip: 8%
- Business-Leisure: 3%

Percent of Total
<table>
<thead>
<tr>
<th>Region</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>14.7</td>
<td>14.2</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>11.2</td>
<td>10.6</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>10.0</td>
<td>10.2</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>8.8</td>
<td>8.4</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>6.0</td>
<td>5.4</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>5.3</td>
<td>3.9</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>5.1</td>
<td>3.9</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>4.3</td>
<td>3.6</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>3.5</td>
<td>2.8</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>3.3</td>
<td>4.2</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>2.6</td>
<td>2.7</td>
</tr>
</tbody>
</table>

*Spent time in region
Total will add to more than State total as a number of travelers visited more than one region.
Pennsylvania’s Day-Trip Market Segments

Base: Adult Day Trips to Pennsylvania

- Marketable Leisure (56%)
- Visiting Friends/Relatives (34%)
- Business (8%)
- Business-Leisure (2%)

41
Main Purpose of Pennsylvania 2011 Day-Trips

Base: Adult Day Trips

Marketable Trips

- Visiting friends/relatives: 34%
- Touring: 11%
- Shopping: 10%
- Special event: 10%
- Casino: 8%
- Outdoors: 5%
- Theme park: 5%
- City trip: 4%
- Resort: 1%
- Golf: <1%
- Conference/convention: 1%
- Other business trip: 7%
- Business-leisure: 2%
Pennsylvania 2011 Purpose of Stay Comparison between Overnight and Day-trip

The graph below illustrates the differences in the purpose of stay of PA’s overnight and day-trip travelers in 2011.
Regions Visited on Day-Trips*

Philadelphia & The Countryside
- 2011: 25.6
- 2010: 23.8

Dutch Country Roads
- 2011: 16.7
- 2010: 16.1

Pittsburgh & Its Countryside
- 2011: 16.2
- 2010: 17.5

Pocono Mountains
- 2011: 15.5
- 2010: 14.3

Upstate PA
- 2011: 10.8
- 2010: 9.3

Pennsylvania's Great Lakes
- 2011: 9.3
- 2010: 8.6

Lehigh Valley
- 2011: 8.3
- 2010: 10.1

Valleys of the Susquehanna
- 2011: 7.6
- 2010: 8.4

The Alleghenies
- 2011: 5.4
- 2010: 6.9

Pennsylvania Wilds
- 2011: 5.4
- 2010: 5.6

Laurel Highlands
- 2011: 4.2
- 2010: 4.1

*Spent time in region
Total will add to more than State total as some tourists visit more than one region.
Pennsylvania
Overnight Trips
Origin Markets for Pennsylvania Overnight Trips
Main Origin States for Pennsylvania’s Marketable Overnight Travelers

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

- Pennsylvania: 38%
- New York: 15%
- New Jersey: 14%
- Ohio: 6%
- Maryland: 6%
- Virginia: 4%
- Massachusetts: 2%
- Delaware: 2%

Base: Marketable Overnight Trips
Main Urban Markets for Pennsylvania’s Marketable Overnight Travelers

In-State DMA’s
- Philadelphia, PA: 17%
- Pittsburgh, PA: 10%
- Harrisburg-Lncstr-Leb-York, PA: 5%
- Wilkes Barre-Scranton, PA: 5%
- Johnstown-Altoona, PA: 4%

Out-of-State DMA’s
- New York, NY: 21%
- Washington, DC: 5%
- Cleveland, OH: 3%
- Baltimore, MD: 3%

Base: Marketable Overnight Trips
Main Origin States for Pennsylvania’s Business Overnight Travelers

Base: Business Overnight Trips

<table>
<thead>
<tr>
<th>State</th>
<th>Percent of Total</th>
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</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>33</td>
</tr>
<tr>
<td>New Jersey</td>
<td>8</td>
</tr>
<tr>
<td>New York</td>
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<td>Maryland</td>
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<tr>
<td>Ohio</td>
<td>3</td>
</tr>
<tr>
<td>Virginia</td>
<td>3</td>
</tr>
<tr>
<td>North Carolina</td>
<td>3</td>
</tr>
<tr>
<td>Texas</td>
<td>3</td>
</tr>
</tbody>
</table>
Main Origin States for Pennsylvania’s Overnight Business-Leisure Trips

Base: Business-Leisure Overnight Trips

- Pennsylvania: 22%
- New York: 15%
- Maryland: 10%
- New Jersey: 8%
- Florida: 5%
- New Hampshire: 4%
- Virginia: 4%
- West Virginia: 4%
- Ohio: 3%
- Delaware: 3%

Percent of Total
Pennsylvania Tourism Regions Visited by Travelers’ State of Residence
The Pocono Mountains region was the most popular PA destination for marketable overnight travelers from New York state in 2011, followed by Dutch Country Roads.

### Pennsylvania Tourism Regions Visited by New York Residents

**Base: Marketable Overnight Trips**

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocono Mountains</td>
<td>25</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>20</td>
</tr>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>16</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>10</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>8</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>6</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>4</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>3</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>3</td>
</tr>
<tr>
<td>Alleghenies &amp; Her Valleys</td>
<td>2</td>
</tr>
<tr>
<td>Laurel Highlands Region</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.
Pennsylvania Tourism Regions Visited by New Jersey Residents

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

Percent of Total

- Pocono Mountains: 39%
- Dutch Country Roads: 21%
- Philadelphia & The Countryside: 15%
- Lehigh Valley: 8%
- Pittsburgh & Its Countryside: 7%
- Upstate PA: 5%
- Pennsylvania Wilds: 4%
- Alleghenies & Her Valleys: 3%
- Valleys of the Susquehanna: 2%
- Pennsylvania's Great Lakes Region: 2%
- Laurel Highlands Region: 1%

Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.
# Pennsylvania Tourism Regions Visited by Ohio Residents

**Base:** Marketable Overnight Trips

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>33</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>25</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>8</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>8</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>5</td>
</tr>
<tr>
<td>Philadelphia &amp; the Countryside</td>
<td>5</td>
</tr>
<tr>
<td>Alleghenies &amp; Her Valleys</td>
<td>5</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>3</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>2</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>1</td>
</tr>
</tbody>
</table>

Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.
Pennsylvania Tourism Regions Visited by Maryland Residents

Base: Marketable Overnight Trips

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

<table>
<thead>
<tr>
<th>Pennsylvania Tourism Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dutch Country Roads Region</td>
<td>32</td>
</tr>
<tr>
<td>Philadelphia &amp; the Countryside</td>
<td>19</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>14</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>6</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>5</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>5</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>4</td>
</tr>
<tr>
<td>Alleghenies &amp; Her Valleys</td>
<td>4</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>2</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>1</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>1</td>
</tr>
</tbody>
</table>

Does not sum to 100% since some survey respondents did not indicate the Pennsylvania tourism region(s) they visited.
Traveler Profile — Overnight Marketable Trips
Gender

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Female</td>
<td>53</td>
<td>53</td>
</tr>
</tbody>
</table>

57
Median Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>12</td>
<td>18</td>
</tr>
<tr>
<td>25-34 years</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>35-44 years</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>45-54 years</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>55-64 years</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>65+</td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>

Base: Overnight Marketable Trips

Percent of Total

Median Age: 44.9 years
Race

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Race Category</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>91</td>
<td>87</td>
</tr>
<tr>
<td>African-American</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>8</td>
</tr>
</tbody>
</table>
Hispanic Background

Base: Overnight Marketable Trips

Percent of Total

Yes

No

Pennsylvania

US Average

60
Marital Status

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/With partner</td>
<td>73</td>
<td>70</td>
</tr>
<tr>
<td>Never married</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>Divorced/Widowed/Separated</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

Percent of Total

61
Household Size

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Members</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>2 members</td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>3 members</td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>4+ members</td>
<td>30</td>
<td>36</td>
</tr>
</tbody>
</table>

Average Household Size: Pennsylvania 3.1 United States 2.9
Presence of Children in Household

Base: Overnight Marketable Trips

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

- No children under 18: Pennsylvania 56%, US Average 59%
- Any child between 13-17: Pennsylvania 18%, US Average 16%
- Any child between 6-12: Pennsylvania 19%, US Average 18%
- Any child under 6: Pennsylvania 22%, US Average 21%
Presence of Children in Household by Age of Adult Traveler

Base: Overnight Marketable Trips

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percent of Total</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>College graduate</td>
<td>39</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Some college</td>
<td>24</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>High school or less</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Employment

Base: Overnight Marketable Trips

Percent of Total

- Full time/self-employed: Pennsylvania 52%, US Average 50%
- Part time: Pennsylvania 11%, US Average 10%
- Not employed/retired/other: Pennsylvania 36%, US Average 40%
Income

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>$150K+</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>$100K-$149.9K</td>
<td>23</td>
<td>21</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>22</td>
<td>21</td>
</tr>
<tr>
<td>Under $25K</td>
<td>10</td>
<td>11</td>
</tr>
</tbody>
</table>
Trip Planning & Booking

Pennsylvania Overnight Marketable Trips
Base: Overnight Marketable Trips

Main Reason for Choosing Pennsylvania

Percent of Total

- Visited before and wanted to see more: 2011 - 62%, 2010 - 56%
- Live nearby: 2011 - 15%, 2010 - 23%
- Recommendation from friend: 2011 - 13%, 2010 - 17%
- Saw/heard advertisement: 2011 - 7%, 2010 - 2%
- Read an article/Heard a news story: 2011 - 2%, 2010 - 2%
Planning Cycle

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Planning Cycle</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Months or More</td>
<td>22</td>
<td>19</td>
</tr>
<tr>
<td>3-5 Months</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>2 Months</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td>1 Month or Less</td>
<td>36</td>
<td>33</td>
</tr>
</tbody>
</table>
## Information Sources Used for Planning the Trip

**Base:** Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online/Internet</td>
<td>43</td>
<td>40</td>
</tr>
<tr>
<td>Personal experience</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>Books</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>Travel guide</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Auto club</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Hotel/resort</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>Advice from friends/relatives</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>State tourism office</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Television</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>
Information Sources Used for Planning the Trip (cont’d)

Base: Overnight Marketable Trips

Percent of total

- Social Media: 3%
- Magazines: 3%
- A toll-free number: 3%
- Local visitors bureaus/CoC: 4%
- Radio: 2%
- Electronic newsletter: 2%
- Newspapers: 2%
- Association/club: 2%
- Travel Agent: 1%
- Blogs: <1%

2011
2010
# Information Sources Considered Useful for Planning the Trip

**Base:** Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>Percent of Total 2011</th>
<th>Percent of Total 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online/Internet</td>
<td>48%</td>
<td>45%</td>
</tr>
<tr>
<td>Personal experience</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>Books</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Auto club</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Travel guide</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Hotel/resort</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Advice from friends/relatives</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>State tourism office</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Magazines</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Social Media</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

---

Note: The data above represents the percent of total sources considered useful for planning trips in 2011 and 2010.
Information Sources Considered Useful for Planning the Trip (cont’d)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percent of Total</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local visitors bureaus/CoC</td>
<td>2</td>
<td>4</td>
<td>-</td>
</tr>
<tr>
<td>Television</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Radio</td>
<td>&lt;1</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>Electronic newsletter</td>
<td>1</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>2</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>Newspapers</td>
<td>1</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Association/club</td>
<td>1</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>Blogs</td>
<td>&lt;1</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>&lt;1</td>
<td>1</td>
<td>-</td>
</tr>
</tbody>
</table>
Use of Pennsylvania Tourism Office Trip Planning Tools

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Tool</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Pennsylvania travel guide</td>
<td>16</td>
<td>19</td>
</tr>
<tr>
<td>Blog about Pennsylvania</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Pennsylvania Facebook page</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>PURSUITS magazine</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Pennsylvania Twitter page</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

www.visitpa.com: Pennsylvania travel guide
Blog about Pennsylvania: Pennsylvania Facebook page
PURSUITS magazine: Pennsylvania Twitter page
www.visitpa.com Usefulness

Base: Overnight Marketable Trips

2011

Not Very Useful: 4%
Somewhat Useful: 25%
Very Useful: 71%

2010

Not Very Useful: <1%
Somewhat Useful: 33%
Very Useful: 67%

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

Percent
Websites Used for Planning Pennsylvania Trip

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Category</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel websites</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Online booking engines</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Car rental websites</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Airline websites</td>
<td>&lt;1</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>
Trip Elements Planned Using Internet

Base: Overnight Marketable Trips

Percent of Total

- Car route/locations/map: 32% (2011), 33% (2010)
- Local activities/attractions/things to see and do: 26% (2011), 24% (2010)
Reasons for Visiting [www.visitpa.com](http://www.visitpa.com)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Reason</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>To obtain more information after I decided to visit</td>
<td>45</td>
<td>44</td>
</tr>
<tr>
<td>To help me decide which Pennsylvania destination to visit</td>
<td>43</td>
<td>39</td>
</tr>
<tr>
<td>To learn more about Pennsylvania</td>
<td>38</td>
<td>29</td>
</tr>
<tr>
<td>To help me decide to visit Pennsylvania</td>
<td>29</td>
<td>29</td>
</tr>
</tbody>
</table>

Percent of Total
www.visitpa.com Influence on Planning

Base: Overnight Marketable Trips

2011
- No Influence: 2
- Very little Influence: 28
- Some Influence: 45
- Large Influence: 25

2010
- No Influence: 8
- Very little Influence: 24
- Some Influence: 48
- Large Influence: 21

Percent

No Influence | Very little Influence | Some Influence | Large Influence

4-Pt. Scale: No Influence, Very Little Influence, Some Influence, A Large Influence
www.visitpa.com Influence on Visitation

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Very little Influence</th>
<th>Some Influence</th>
<th>Large Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>13</td>
<td>66</td>
<td>21</td>
</tr>
<tr>
<td>2010</td>
<td>20</td>
<td>56</td>
<td>24</td>
</tr>
</tbody>
</table>

4-Pt. Scale: No Influence, Very Little Influence, Some Influence, A Large Influence
Channels to **www.visitpa.com**

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percent of Total 2011</th>
<th>Percent of Total 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet search</td>
<td>71</td>
<td>70</td>
</tr>
<tr>
<td>Magazine or newspaper advertisement</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Internet advertisement</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>Travel brochure</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Pennsylvania travel guide</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>Family/friend(s)/colleague(s)</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Magazine or newspaper article/programs</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Other advertisement (e.g., Radio, billboard, etc.)</td>
<td>9</td>
<td>6</td>
</tr>
</tbody>
</table>
Technology Used by Travelers

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Device</th>
<th>Planning the trip</th>
<th>During the trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop computer</td>
<td>51</td>
<td>6</td>
</tr>
<tr>
<td>Laptop computer</td>
<td>38</td>
<td>27</td>
</tr>
<tr>
<td>Smartphone</td>
<td>8</td>
<td>31</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>5</td>
<td>11</td>
</tr>
</tbody>
</table>
Planning Considerations Beyond Cost

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>34/30</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>15/18</td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>17/17</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>10/17</td>
</tr>
<tr>
<td>Nearby destination</td>
<td>4/7</td>
</tr>
<tr>
<td>Visit family/friends</td>
<td>4/6</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>3/3</td>
</tr>
</tbody>
</table>

85
Percent of Travelers Booking In Advance

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>78</td>
</tr>
<tr>
<td>2011</td>
<td>79</td>
</tr>
</tbody>
</table>
Booking Cycle

Base: Overnight Marketable Trips

Percent of Total

- **6 Months or More**
  - 2010: 10
  - 2011: 9

- **3-5 Months**
  - 2010: 21
  - 2011: 18

- **2 Months**
  - 2010: 24
  - 2011: 22

- **1 Month or Less**
  - 2010: 45
  - 2011: 51

87
Use of Vacation Packages and Group Travel

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td>18</td>
<td>16</td>
</tr>
</tbody>
</table>
Trip Characteristics of Pennsylvania’s Marketable Overnight Travelers
Distance Traveled to Pennsylvania

Base: Overnight Marketable Trips

Distance Traveled to Pennsylvania

Percent of Total

- Over 1,000 Miles: 3% (2011), 3% (2010)
- 500-1,000 Miles: 7% (2011), 7% (2010)
- 300-499 Miles: 10% (2011), 8% (2010)
- 100-299 Miles: 17% (2011), 18% (2010)
- 50-99 Miles: 8% (2011), 10% (2010)
- Under 50 Miles: 8% (2011), 10% (2010)
Transportation Used to Enter Pennsylvania

Base: Overnight Marketable Trips starting outside of Pennsylvania

Percent of Total

Personal

- Own car: 86%
- Truck/Van/RV: 5%
- Rental car: 8%
- Bicycle/Motorcycle: <1%

Commercial

- Plane: 3%
- Train: 2%
- Bus: 4%
- Taxi: 2%
- Ferry/cruise ship/boat: <1%
- Shuttle van: <1%
Transportation Used Inside Pennsylvania

Base: Overnight Marketable Trips

Personal
- Own car
- Rental car
- Truck/Van/RV
- Bicycle/Motorcycle
- Motor/sailboat

Commercial
- Bus
- Shuttle van
- Plane
- Ferry/cruise ship/boat
- Taxi
- Train

Percent of Total

Base: Overnight Marketable Trips

Personal
- Own car: 84% (2011), 83% (2010)
- Rental car: 8% (2011), 7% (2010)
- Truck/Van/RV: 4% (2011), 6% (2010)
- Bicycle/Motorcycle: 1% (2011), 2% (2010)

Commercial
- Bus: 5% (2011), 4% (2010)
- Shuttle van: 4% (2011), 2% (2010)
- Plane: 2% (2011), 3% (2010)
- Ferry/cruise ship/boat: 2% (2011), 1% (2010)
- Train: 1% (2011), 4% (2010)
Total Nights Away

Base: Overnight Marketable Trips

Percent of Total

- **1 Night**
  - 2011: 31%
  - 2010: 33%
  - 2011: 33
  - 2010: 31

- **2 Nights**
  - 2011: 31%
  - 2010: 33%
  - 2011: 31
  - 2010: 33

- **3-6 Nights**
  - 2011: 27%
  - 2010: 25%
  - 2011: 27
  - 2010: 25

- **7+ Nights**
  - 2011: 9%
  - 2010: 11%
  - 2011: 9
  - 2010: 11

**Average Number of Nights**

- **2011**: 3.1
- **2010**: 3.2

93
Length of Stay

Base: Overnight Marketable Trips

2011
- Pennsylvania: 2.6
- Other Places: 0.3
Total = 2.9

2010
- Pennsylvania: 2.6
- Other Places: 0.3
Total = 2.9

Average Number of Nights

* Those who spent 1+ nights anywhere in Pennsylvania
Accommodations*

Base: Overnight Marketable Trips

Percent of Total

- **Hotel**: 41% (2011), 41% (2010)
- **Motel**: 14% (2011), 12% (2010)
- **Indoor water park**: 12% (2011), 12% (2010)
- **Own House/Cottage/Cabin**: 7% (2011), 4% (2010)
- **Friends/Relatives House/Cottage/Cabin**: 6% (2011), 4% (2010)
- **Time Sharing Unit**: 8% (2011), 6% (2010)
- **Bed & Breakfast**: 4% (2011), 4% (2010)
- **Country Inn/Lodge**: 6% (2011), 4% (2010)
- **Rented Campground/trailer park site**: 10% (2011)
- **Seasonally Rented House/Cottage/Cabin**: 4% (2011), 2% (2010)
- **Wilderness Campsite**: 1% (2011), 2% (2010)
- **Other Rented House/Cottage/Cabin**: 1% (2011), 1% (2010)
- **Working Farm**: <1% (2011), <1% (2010)
- **State Park Lodge**: <1% (2011)

* Percent of trip nights spent in each type of accommodation
Size of Travel Party

Base: Overnight Marketable Trips

Average No. of People

- 2011: 2.2 Adults + 0.6 Children under 18 = 2.8 Total
- 2010: 2.3 Adults + 0.6 Children under 18 = 2.9 Total

**Total = 2.8**
Composition of Travel Party

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Relationship</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>66</td>
<td>65</td>
</tr>
<tr>
<td>Child(ren)</td>
<td>38</td>
<td>35</td>
</tr>
<tr>
<td>Friend(s)</td>
<td>16</td>
<td>19</td>
</tr>
<tr>
<td>Just Myself</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>Parent(s)</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Other Relative(s)</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Grandparents</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Business Associates</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Percent of Total
Trip Experiences — Overnight Marketable Trips
Things Seen and Experienced on Trip

Base: Overnight Marketable Trips

Percent of Total

- Scenic drive: 20% (2011), 20% (2010)
- Other shopping: 13% (2011), 17% (2010)
- Outlet shopping: 16% (2011), 18% (2010)
- Farmer's market: 9% (2011), 10% (2010)
- Civil war site: 7% (2011), 8% (2010)
- Art museum/exhibit: 6% (2011), 8% (2010)
- Other museums: 6% (2011), 7% (2010)
- Other historical sites: 7% (2011), 7% (2010)
- Local artist: 5% (2011), 6% (2010)
Things Seen and Experienced on Trip (cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Unique shopping: 6% (2011), 7% (2010)
- Zoo: 4% (2011), 7% (2010)
- Historic house tour: 3% (2011), 4% (2010)
- Revolutionary war site: 4% (2011), 4% (2010)
- Brewery: 3% (2011), 3% (2010)
- Historical re-enactments: 3% (2011)
- Guided tour: 3% (2011)
- Caves: 3% (2011), 3% (2010)
- Winery/vineyard: 2% (2011), 4% (2010)
- Aquarium: 1% (2011), 1% (2010)
- Coal mine: <1% (2011), 1% (2010)
### Dining/Entertainment

**Base: Overnight Marketable Trips**

**Percent of Total**

<table>
<thead>
<tr>
<th>Activity</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique local foods</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Casino/racetrack</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Up-scale restaurants</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Fair/festival</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Nightlife</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Other live performance</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Local music/theater</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Theater/dance/symphony/opera</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Jazz/rock concert</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Auto show</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Professional theater</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Entertainment/shows</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Dance performance</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Classical music/dance</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
Sports and Recreation

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent of Total</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amusement/waterpark</td>
<td>17</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>Other outdoor sport/activity</td>
<td></td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Camping</td>
<td></td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Professional/collegiate sports event</td>
<td></td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Swam in a pool</td>
<td></td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Hiking</td>
<td></td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>Amateur sporting event</td>
<td></td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Fishing</td>
<td></td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Beach at lake/river</td>
<td></td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Jogging/running</td>
<td></td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Swam in a lake/river</td>
<td></td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>
Sports and Recreation (cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Golfing: 2011 (3), 2010 (5)
- Biking: 2011 (2), 2010 (3)
- Hunting: 2011 (1), 2010 (3)
- Horseback riding: 2011 (1), 2010 (1)
- Indoor fitness/yoga: 2011 (1), 2010 (2)
- Canoe/kayaking: 2011 (1), 2010 (1)
- Snow skiing/snowboarding: 2011 (1), 2010 (2)
- Backpacking: 2011 (1), 2010 (3)
- Extreme sports: 2011 (1), 2010 (1)
- Spiritual/meditation center: 2011 (1), 2010 (1)
- Powerboating/sailing: 2011 (1), 2010 (1)
- Snowmobiling: 2011 (1), 2010 (1)
- River rafting: 2011 (1), 2010 (2)
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

Pennsylvania has a distinct advantage over other US destinations in attracting NY travelers interested in theme parks, historic sites, and zoos.
Main Activities of Travelers from New Jersey on Marketable Overnight Trips to Pennsylvania vs to All US Destinations

Pennsylvania has an advantage over other US destinations in attracting NJ travelers interested in historic sites, museums, outdoor activities, and national/state parks.
Pennsylvania has an advantage over other US destinations in attracting travelers from Ohio interested in casinos, museums, national/state parks, sports events, and nightlife.
Pennsylvania has an advantage over other US destinations in attracting travelers from Maryland interested in outdoor activities, sports events, and fair/exhibition/festivals.
Pennsylvania’s outdoor recreational opportunities are a big draw for the state’s resident travelers.
Activities by Presence/Absence of Children in Travelers’ Household
Main Activities of Travelers to Pennsylvania on Marketable Overnight Trips With Children and Without Children

Travelers with children are far more likely to visit a theme park or participate in outdoor activities, while those without children are more likely to visit fine dining, a casino, and historic sites.
Regional Attractions Visited
2011 Marketable Overnight Trips
Pennsylvania Regional Map
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

Base: Overnight Trips

Percent of Total

- City of Erie: 43%
- Erie Zoo & Botanical Gardens: 23%
- Presque Isle State Park: 20%
- Splash Lagoon/Waldameer Water Parks: 14%
- Presque Isle Downs & Casino: 13%
- Covered Bridges: 10%
- Golf course: 8%
- Historic House/Museum: 8%
- Erie Art Museum: 7%
- Winery/Vineyard: 7%
- Tom Ridge Environmental Center: 6%
- Underground Railroad: 3%

*Erie Region
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

Base: Overnight Trips

Percent of Total

- Conneaut Lake: 12%
- Cook Forest: 9%
- Oil City: 9%
- Oil Heritage Region: 8%
- Erie National Wildlife Refuge: 6%
- Conneaut Lake Park: 6%
- Oil Creek & Titusville Railroad: 6%
- Covered Bridges: 5%
- Underground Railroad: 5%
- Historic House/Museum: 5%
- Golf course: 4%
- Pymatuning State Park: 4%
- Grove City Shopping Outlets: 3%
- Oil Creek State Park: 3%

*Remainder of Region
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*

Base: Overnight Marketable Trips

Percent of Total

- City of Pittsburgh: 28%
- Professional Sports Game (Pittsburgh Steelers/Pirates/Penguins): 25%
- Pittsburg Zoo & PPG Aquarium: 14%
- Carnegie Museums: 13%
- Fort Pitt Museum: 8%
- College Sports Event: 8%
- Historic House/Museum: 8%
- Pittsburgh Cultural District: 7%
- Children’s Museum of Pittsburgh: 6%
- Winery/Vineyard: 6%
- Phipps Conservatory & Gardens: 6%
- Cathedral of Learning: 3%
- Duquesne Incline: 3%

*Pittsburgh/Allegheny County
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zelienople</td>
<td>10</td>
</tr>
<tr>
<td>Golf course</td>
<td>6</td>
</tr>
<tr>
<td>Amish Farms/Countryside</td>
<td>5</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>5</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>4</td>
</tr>
<tr>
<td>Old Economy Village</td>
<td>3</td>
</tr>
<tr>
<td>A Covered Bridge</td>
<td>3</td>
</tr>
<tr>
<td>Slippery Rock</td>
<td>3</td>
</tr>
</tbody>
</table>

*Remainder of Region
Pennsylvania Attractions/Events — Laurel Highlands Region*

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winery/Vineyard</td>
<td>16</td>
</tr>
<tr>
<td>Seven Springs</td>
<td>16</td>
</tr>
<tr>
<td>Uniontown</td>
<td>16</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>13</td>
</tr>
<tr>
<td>Shanksville/Stonycreek/Flight 93 Memorial</td>
<td>13</td>
</tr>
<tr>
<td>Fallingwater/Frank Lloyd Wright House</td>
<td>9</td>
</tr>
<tr>
<td>Connellsville</td>
<td>9</td>
</tr>
<tr>
<td>Meyersdale</td>
<td>7</td>
</tr>
<tr>
<td>Nemacolin</td>
<td>7</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>6</td>
</tr>
<tr>
<td>Ohiopyle/Ohiopyle State Park</td>
<td>6</td>
</tr>
<tr>
<td>Other Frank Lloyd Wright Houses</td>
<td>6</td>
</tr>
<tr>
<td>Friendship Hill National Historic Site</td>
<td>6</td>
</tr>
<tr>
<td>Fort Ligonier</td>
<td>5</td>
</tr>
<tr>
<td>Bushy Run Battlefield</td>
<td>3</td>
</tr>
<tr>
<td>Fort Necessity National Battlefield</td>
<td>3</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Overnight Trips

Percent of Total

- Little Pine State Park: 15%
- Millionaires' Row (Historic Homes): 9%
- Historic House/Museum: 9%
- Little League World Series & Related Events: 6%
- Golf course: 6%
- Winery/Vineyard: 4%
- Peter J. McGovern Little League Museum: 3%
- Piper Aviation Museum: 3%
- Underground Railroad: 2%

*Williamsport/Lycoming County
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Overnight Trips

Percent of Total

- Allegheny National Forest: 13%
- Cook Forest State Park: 12%
- Clarion River: 11%
- Pennsylvania's Elk Herd/Elk State Park: 10%
- Kettle Creek State Park: 9%
- Pennsylvania Lumber Museum: 9%
- Pine Creek Gorge/Pennsylvania Grand Canyon: 7%
- Tionesta/Tionesta Lake: 6%
- Penn Brad Oil Museum: 5%
- Punxsutawney/Groundhog Phil: 4%
- Zippo/Case Museum: 4%
- Red Hill Fish Fossil Site: 4%
- Kinzua State Park/Kinzua Bridge/Kinzua Dam: 3%
- Historic Curtin Village/Eagle Ironworks: 3%
- The Woolrich Store & Outlet: 3%

*Remainder of Region
Pennsylvania Attractions/Events — Valleys of the Susquehanna Region*

Base: Overnight Trips

Percent of Total

- Knoebels Amusement Park & Resort: 15
- Covered Bridges: 10
- Historic Home/Museum: 9
- Golf Course: 7
- Shikellamy State Park: 6
- Winery/Vineyard: 5
- Joseph Priestley House: 3
- Bloomsburg Fair: 2
- Ricketts Glen State Park: 2
Pennsylvania Attractions/Events — The Alleghenies Region*

- Penn State University: 20%
- Covered Bridges: 8%
- Penn State Sports Event: 7%
- Bellefonte Museum: 4%
- Toftrees Golf Resort: 4%
- Central Pennsylvania Festival of the Arts: 3%
- Penn State All Sports Museum: 3%

Base: Overnight Trips

*State College Region
Pennsylvania Attractions/Events — The Alleghenies Region*

Base: Overnight Trips

Percent of Total

- Johnstown Inclined Plane: 9%
- Horseshoe Curve: 9%
- Gravity Hill: 9%
- Altoona Railroad Museum: 7%
- Johnstown Flood Museum/Memorial: 6%
- Old Bedford Village: 5%
- Bedford Springs: 4%
- Covered Bridges: 4%
- Winery/Vineyard: 3%
- Raystown Lake: 3%
- Lakemont Park: 2%

*Remainder of Region
Pennsylvania Attractions/Events —
Upstate PA Region*

Base: Overnight Trips

Percent of Total

- Covered Bridges: 8
- Historic Home/Museum: 8
- Golf course: 5
- Old Mill Village Museum: 5
- Center For Anti-Slavery Studies: 4
- Winery/Vineyard: 3
- Pennsylvania Anthracite Coal Miners: 3
- Eagle's Mere Historic Village: 2
- Underground Railroad: 2
- Ricketts Glen State Park: 2
- The Downs at Carbondale: 2

*Endless Mountains
Pennsylvania Attractions/Events — Upstate PA Region*

Base: Overnight Trips

- Lackawanna Coal Mine Tour: 6%
- Winery/Vineyard: 5%
- Historic Home/Museum: 5%
- Covered Bridges: 4%
- Golf course: 4%
- Mohegan Sun at Pocono Downs: 3%
- Pioneer Tunnel Coal Mine: 3%
- Underground Railroad: 2%
- Steamtown National Historic Site: 2%
- Houdini Tour & Museum: 2%
- Lackawanna Electric Trolley: 2%
- The Downs at Hazleton: 2%
- PA Anthracite Coal Museum: 2%

*Wilkes-Barre/Scranton
Pennsylvania Attractions/Events — Pocono Mountains Region

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mount Airy Casino Resort</td>
<td>22</td>
</tr>
<tr>
<td>Bushkill Falls</td>
<td>21</td>
</tr>
<tr>
<td>The Crossings Premium Outlets</td>
<td>18</td>
</tr>
<tr>
<td>Delaware Water Gap</td>
<td>12</td>
</tr>
<tr>
<td>Camelback Waterpark</td>
<td>9</td>
</tr>
<tr>
<td>Jim Thorpe</td>
<td>9</td>
</tr>
<tr>
<td>Pocono Raceway</td>
<td>7</td>
</tr>
<tr>
<td>Carousel Water &amp; Fun Park</td>
<td>7</td>
</tr>
<tr>
<td>Caesar's Resort</td>
<td>7</td>
</tr>
<tr>
<td>Hickory Run State Park &amp; Big Boulder Field</td>
<td>5</td>
</tr>
<tr>
<td>Golf course</td>
<td>5</td>
</tr>
<tr>
<td>Lake Wallenpaupack</td>
<td>5</td>
</tr>
<tr>
<td>Promised Land State Park</td>
<td>4</td>
</tr>
<tr>
<td>Great Wolf Lodge</td>
<td>4</td>
</tr>
<tr>
<td>The Downs at East Stroudsburg</td>
<td>3</td>
</tr>
<tr>
<td>Tobyhanna State Park</td>
<td>3</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

Percent of Total

- Gettysburg Battlefield/National Military Park: 17%
- Historic Home/Museum: 12%
- Gettysburg National Military Park & Museum: 11%
- Covered Bridges: 10%
- Winery/Vineyard: 6%
- Eisenhower National Historic Site: 6%
- Gettysburg Diorama: 5%
- Outlet Malls at Gettysburg Village: 4%
- General Lee's Headquarters: 4%
- Hall of Presidents & First Ladies: 4%
- Land of Little Horses: 3%

*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net attendance of 18%
### Pennsylvania Attractions/Events — Dutch Country Roads Region*

**Base: Overnight Marketable Trips**

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>HersheyPark</td>
<td>30</td>
</tr>
<tr>
<td>The Hershey Story, The Museum on Chocolate Avenue</td>
<td>14</td>
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<tr>
<td>Outlets at Hershey</td>
<td>11</td>
</tr>
<tr>
<td>Hershey Gardens</td>
<td>9</td>
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<tr>
<td>Indian Echo Caverns</td>
<td>5</td>
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<tr>
<td>Lake Tobias Wildlife Park</td>
<td>5</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>5</td>
</tr>
<tr>
<td>Antique Auto Museum at Hershey</td>
<td>4</td>
</tr>
<tr>
<td>Pennsylvania State Capitol</td>
<td>4</td>
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<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Whitaker Center for Science &amp; the Arts</td>
<td>2</td>
</tr>
</tbody>
</table>

* Harrisburg/Hershey Area
Pennsylvania Attractions/Events — Dutch Country Roads Region

Base: Overnight Marketable Trips

Percent of Total

- Amish Farms/Countryside: 36%
- Outlet Mall (Rockvale, Tanger): 27%
- Covered Bridges: 15%
- Strasburg Railroad/Traintown: 10%
- Railroad Museum of Pennsylvania: 8%
- Dutch Wonderland Family Amusement Park: 7%
- Historic Home/Museum: 7%
- Ephrata Cloister: 6%
- Winery/Vineyard: 6%
- Lancaster Central Market: 5%
- People's Place Quilt Museum: 4%
- Christiana Underground Railroad Center at…: 2%
- National Toy Train Museum: 2%

*Lancaster Amish Farmland*
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

Percent of Total

- Utz Quality Foods Factory: 5
- Snyder's of Hanover: 3
- Martin's Potato Chip Factory: 2
- Harley-Davidson Factory: 2
- Gifford Pinchot State Park: 2
- Hanover Shoe Farms: 2

*York Region
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

Percent of Total

- VF Outlet Village: 8
- Cabela's: 5
- Carlisle Auto Show: 4
- Historic Home/Museum: 4
- Pine Grove State Park & Iron Furnace: 3
- Hawk Mountain: 2
- Army Heritage & Education Center: 2
- Kings Gap Environmental Education & Training Center: 2
- Union Canal: 2

*Remainder of region
Pennsylvania Attractions/Events — Lehigh Valley Region

Base: Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bethlehem Sands Casino Resort</td>
<td>16</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>12</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>12</td>
</tr>
<tr>
<td>The Downs at Lehigh Valley</td>
<td>9</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>9</td>
</tr>
<tr>
<td>Dorney Park &amp; Wildwater Kingdom</td>
<td>8</td>
</tr>
<tr>
<td>National Canal Museum</td>
<td>6</td>
</tr>
<tr>
<td>Mack Trucks</td>
<td>4</td>
</tr>
<tr>
<td>Crayola Factory</td>
<td>4</td>
</tr>
<tr>
<td>Martin Guitars</td>
<td>4</td>
</tr>
<tr>
<td>Museum of Indian Culture</td>
<td>3</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region* (cont’d)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independence Seaport Museum</td>
<td>5</td>
</tr>
<tr>
<td>US Mint</td>
<td>4</td>
</tr>
<tr>
<td>The Franklin (institute)</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>2</td>
</tr>
<tr>
<td>Eastern State Penitentiary Historic Site</td>
<td>2</td>
</tr>
<tr>
<td>Philadelphia Premium Outlets</td>
<td>2</td>
</tr>
<tr>
<td>Rodin Museum</td>
<td>2</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

- Herr’s Snack Factory Tour: 5%
- Historic Home/Museum: 3%
- Covered Bridges: 2%
- Brandywine Battlefield Park: 2%
- Longwood Gardens: 2%

*Brandywine Valley
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*

*Remainder of Region

Base: Overnight Marketable Trips

Percent of Total

- King of Prussia Mall: 11
- Valley Forge National Historic Park: 6
- Prime Outlets: 4
- Peddler's Village: 4
- Sesame Place: 3
- Historic Home/Museum: 2
- Covered Bridges: 2
- Golf course: 2

*Remainder of Region
Importance of Factors in Choice of Pennsylvania Tourism Region
# Importance of Factors In Choosing to Visit Pennsylvania’s Great Lakes Region

**Base:** Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>71</td>
<td>62</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>54</td>
<td>54</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>44</td>
<td>43</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>42</td>
<td>43</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>37</td>
<td>37</td>
</tr>
</tbody>
</table>

* 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*

- Great shopping
  - 2010: 29
  - 2011: 36

- Within a two-hour drive from home
  - 2010: 22
  - 2011: 35

- Lots of information about the destination on the...
  - 2010: 20
  - 2011: 34

- A great rural/agricultural area
  - 2010: 26
  - 2011: 33

- Lots of cultural things to see or experience
  - 2010: 27
  - 2011: 33

- A fun city environment
  - 2010: 27
  - 2011: 31

- Lots of historic things to see or experience
  - 2010: 19
  - 2011: 30

- Great opportunities for nature/eco-travel
  - 2010: 18
  - 2011: 29

- Availability of luxury accommodations
  - 2010: 20
  - 2011: 29

- Availability of camping or RV facilities
  - 2010: 20
  - 2011: 28

- Focus on “green travel”
  - 2010: 19
  - 2011: 27

- Different or unique local artwork/craftwork
  - 2010: 19
  - 2011: 25

* 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*

- Unique or local food and cuisine: 37 (2011), 32 (2010)

* 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*

- Lots of cultural things to see or experience: 29% (2011), 23% (2010)
- Being at a place I’ve never seen before: 21% (2011), 23% (2010)
- Lots of historic things to see or experience: 23% (2011), 18% (2010)
- Lots of things for children to see and do: 20% (2011), 21% (2010)
- Within a two-hour drive from home: 20% (2011), 16% (2010)
- Lots of information about the destination on the…: 28% (2011), 20% (2010)
- Availability of luxury accommodations: 20% (2011), 17% (2010)
- Different or unique local artwork/craftwork: 16% (2011), 9% (2010)
- A great rural/agricultural area: 24% (2011), 14% (2010)
- Great opportunities for nature/eco-travel: 24% (2011), 12% (2010)
- Focus on “green travel”: 22% (2011), 8% (2010)
- Availability of camping or RV facilities: 22% (2011), 7% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Laurel Highlands Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 50% (2011) vs 50% (2010)
- Convenient access by car: 52% (2011) vs 44% (2010)
- Having family or friends who live in the region: 44% (2011) vs 45% (2010)
- Lots of things for adults to see and do: 36% (2011) vs 37% (2010)
- Affordable attractions/events: 31% (2011) vs 42% (2010)
- A great rural/agricultural area: 33% (2011) vs 33% (2010)
- Availability of mid-range accommodations: 30% (2011) vs 36% (2010)
- Unique or local food and cuisine: 28% (2011) vs 35% (2010)
- Lots of historic things to see or experience: 33% (2011) vs 31% (2010)
- Being at a place I’ve never seen before: 33% (2011) vs 33% (2010)
- Availability of economy or budget accommodations: 33% (2011) vs 31% (2010)
- Availability of luxury accommodations: 17% (2011) vs 31% (2010)

Base: Overnight Trips

* Rated 8, 9 or 10 on 10-pt. Importance scale
### Importance of Factors In Choosing to Visit Laurel Highlands Region (cont’d)

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-hour drive from home</td>
<td>30</td>
<td>29</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>30</td>
<td>29</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>27</td>
<td>23</td>
</tr>
<tr>
<td>Lots of information about the destination on the...</td>
<td>25</td>
<td>23</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>25</td>
<td>23</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>25</td>
<td>21</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Great shopping</td>
<td>24</td>
<td>16</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Pennsylvania Wilds

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 62% (2011), 63% (2010)
- Convenient access by car: 59% (2011), 50% (2010)
- Having family or friends who live in the region: 45% (2011), 44% (2010)
- Affordable attractions/events: 46% (2011), 46% (2010)
- Within a two-to-four-hour drive from home: 44% (2011), 44% (2010)
- Availability of economy or budget accommodations: 44% (2011), 44% (2010)
- Availability of mid-range accommodations: 36% (2011), 34% (2010)
- Within a two-hour drive from home: 32% (2011), 31% (2010)
- Lots of historic things to see or experience: 32% (2011), 32% (2010)
- Being at a place I've never seen before: 28% (2011), 26% (2010)
- Lots of things for children to see and do: 26% (2011), 26% (2010)
- Lots of things for adults to see and do: 25% (2011), 39% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
* Caution - low base size.
Importance of Factors In Choosing to Visit Pennsylvania Wilds (cont’d)

Base: Overnight Trips

% Rating Factor As Very Important*

- A great rural/agricultural area: 22% (2011), 37% (2010)
- Availability of camping or RV facilities: 22% (2011), 32% (2010)
- A fun place for couples: 20% (2011), 36% (2010)
- Lots of cultural things to see or experience: 17% (2011), 33% (2010)
- Lots of information about the destination on the…: 16% (2011), 30% (2010)
- Availability of luxury accommodations: 13% (2011), 23% (2010)
- Great shopping: 13% (2011), 21% (2010)
- Focus on “green travel”: 13% (2011), 21% (2010)
- Different or unique local artwork/craftwork: 11% (2011), 22% (2010)
- Unique or local food and cuisine: 10% (2011), 38% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
* Caution - low base size.
## Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having family or friends who live in the region</td>
<td>54</td>
<td>40</td>
</tr>
<tr>
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<td>51</td>
<td>47</td>
</tr>
<tr>
<td>Feeling safe at the destination</td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>49</td>
<td>46</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>46</td>
<td>33</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>32</td>
<td>31</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>35</td>
<td>29</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>29</td>
<td>20</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>27</td>
<td>21</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>27</td>
<td>25</td>
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</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
### Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region Cont’d

<table>
<thead>
<tr>
<th>Factor</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of mid-range accommodations</td>
<td>24</td>
<td>29</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>24</td>
<td>42</td>
</tr>
<tr>
<td>Lots of information about the destination on the..</td>
<td>21</td>
<td>33</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>21</td>
<td>28</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>20</td>
<td>28</td>
</tr>
<tr>
<td>Great shopping</td>
<td>18</td>
<td>31</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>16</td>
<td>29</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>16</td>
<td>33</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>16</td>
<td>21</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>12</td>
<td>26</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips
Importance of Factors In Choosing to Visit The Alleghenies Region

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td></td>
<td>65</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td></td>
<td>64</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td></td>
<td>63</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td></td>
<td>44</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td></td>
<td>44</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td></td>
<td>37</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td></td>
<td>37</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td></td>
<td>39</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td></td>
<td>29</td>
</tr>
<tr>
<td>Lots of information about the destination on the...</td>
<td></td>
<td>22</td>
</tr>
</tbody>
</table>

* 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*

- Lots of historic things to see or experience: 22% (2011), 29% (2010)
- Availability of economy or budget accommodations: 22% (2011), 22% (2010)
- Being at a place I’ve never seen before: 19% (2011), 27% (2010)
- Availability of luxury accommodations: 18% (2011), 17% (2010)
- A fun place for couples: 18% (2011), 15% (2010)
- Availability of camping or RV facilities: 16% (2011), 27% (2010)
- Lots of cultural things to see or experience: 16% (2011), 15% (2010)
- Different or unique local artwork/craftwork: 10% (2011), 19% (2010)
- Focus on “green travel”: 8% (2011), 12% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
# Importance of Factors In Choosing to Visit Upstate PA

**Base:** Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>% Rating Factor As Very Important*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>76/74</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>57/73</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>51/55</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>23/50</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>45/44</td>
</tr>
<tr>
<td>Being at a place I've never seen before</td>
<td>33/38</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>34/58</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>24/34</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>34/44</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>32/46</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>29/46</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>28/36</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
### Importance of Factors In Choosing to Visit Upstate PA (cont’d)

**Base:** Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique or local food and cuisine</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>Great shopping</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>22</td>
<td>17</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>9</td>
<td>17</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>32</td>
<td>20</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>20</td>
<td>45</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>18</td>
<td>32</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>13</td>
<td>9</td>
</tr>
</tbody>
</table>

*Rated 8, 9 or 10 on 10-pt. Importance scale*
Importance of Factors In Choosing to Visit Pocono Mountains

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Convenient access by car: 74% (2011) vs. 73% (2010)
- Feeling safe at the destination: 73% (both years)
- Lots of things for adults to see and do: 63% (2011) vs. 74% (2010)
- Affordable attractions/events: 62% (2011) vs. 64% (2010)
- Availability of mid-range accommodations: 54% (2011) vs. 55% (2010)
- Within a two-hour drive from home: 50% (2011) vs. 45% (2010)
- Within a two-to-four-hour drive from home: 48% (2011) vs. 46% (2010)
- Availability of economy or budget accommodations: 46% (2011) vs. 46% (2010)
- Lots of things for children to see and do: 45% (both years)
- A fun place for couples: 43% (2011) vs. 30% (2010)
- Being at a place I've never seen before: 41% (2011) vs. 33% (2010)
- Great shopping: 38% (2011) vs. 32% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Pocono Mountains (cont’d)

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Lots of information about the destination on the Internet: 32% (2011), 36% (2010)
- Unique or local food and cuisine: 25% (2011), 32% (2010)
- Availability of luxury accommodations: 21% (2011), 36% (2010)
- Lots of historic things to see or experience: 34% (2011), 63% (2010)
- Lots of cultural things to see or experience: 24% (2011), 32% (2010)
- A great rural/agricultural area: 28% (2011), 36% (2010)
- Availability of camping or RV facilities: 27% (2011), 31% (2010)
- Different or unique local artwork/craftwork: 17% (2011), 26% (2010)
- Focus on “green travel”: 9% (2011), 20% (2010)
- Having family or friends who live in the region: 16% (2011), 23% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Dutch Country Roads

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 2011 - 71, 2010 - 62
- Convenient access by car: 2011 - 68, 2010 - 62
- Affordable attractions/events: 2011 - 57, 2010 - 52
- Availability of mid-range accommodations: 2011 - 48, 2010 - 39
- Lots of things for adults to see and do: 2011 - 37, 2010 - 37
- Lots of historic things to see or experience: 2011 - 44, 2010 - 44
- Great shopping: 2011 - 39, 2010 - 33
- Lots of cultural things to see or experience: 2011 - 35, 2010 - 35
- Availability of economy or budget accommodations: 2011 - 35, 2010 - 33
- Lots of things for children to see and do: 2011 - 32, 2010 - 27
- Within a two-to-four-hour drive from home: 2011 - 35, 2010 - 35
- Unique or local food and cuisine: 2011 - 27, 2010 - 36

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Dutch Country Roads (cont’d)

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Being at a place I’ve never seen before: 26% (2011), 31% (2010)
- Within a two-hour drive from home: 22% (2011), 23% (2010)
- Lots of information about the destination on the…: 22% (2011), 27% (2010)
- A great rural/agricultural area: 22% (2011), 30% (2010)
- Availability of camping or RV facilities: 17% (2011), 19% (2010)
- Having family or friends who live in the region: 16% (2011), 16% (2010)
- Different or unique local artwork/craftwork: 14% (2011), 20% (2010)
- Availability of luxury accommodations: 12% (2011), 14% (2010)
- Great opportunities for nature/eco-travel: 8% (2011), 16% (2010)
- Focus on “green travel” 6% (2011), 14% (2010)

* 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*

- Feeling safe at the destination: 55% (2011), 61% (2010)
- Having family or friends who live in the region: 49% (2011), 46% (2010)
- Affordable attractions/events: 43% (2011), 48% (2010)
- Convenient access by car: 45% (2011), 43% (2010)
- Lots of things for adults to see and do: 34% (2011), 30% (2010)
- Unique or local food and cuisine: 28% (2011), 28% (2010)
- Being at a place I've never seen before: 33% (2011), 27% (2010)
- Availability of economy or budget accommodations: 27% (2011), 25% (2010)
- A great rural/agricultural area: 26% (2011), 19% (2010)
- Lots of historic things to see or experience: 25% (2011), 18% (2010)
- Lots of things for children to see and do: 24% (2011), 19% (2010)
- Within a two-to-four-hour drive from home: 35% (2011), 23% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Lehigh Valley (cont’d)

% Rating Factor As Very Important*

- Availability of mid-range accommodations: 21% (2011), 21% (2010)
- Lots of information about the destination on the..: 21% (2011), 21% (2010)
- Great shopping: 20% (2011), 24% (2010)
- Within a two-hour drive from home: 31% (2011), 32% (2010)
- A fun city environment: 18% (2011), 16% (2010)
- Lots of cultural things to see or experience: 18% (2011), 16% (2010)
- Great opportunities for nature/eco-travel: 18% (2011), 7% (2010)
- Different or unique local artwork/craftwork: 16% (2011), 11% (2010)
- Availability of luxury accommodations: 14% (2011), 13% (2010)
- Focus on “green travel”: 13% (2011), 3% (2010)
- Availability of camping or RV facilities: 10% (2011), 5% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Philadelphia & The Countryside

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Affordable attractions/events: 70% in 2011, 61% in 2010
- Lots of things for adults to see and do: 67% in 2011, 65% in 2010
- Convenient access by car: 65% in 2011, 63% in 2010
- Feeling safe at the destination: 63% in 2011, 61% in 2010
- A fun city environment: 58% in 2011, 58% in 2010
- Lots of historic things to see or experience: 55% in 2011, 48% in 2010
- Lots of information about the destination on the Internet: 55% in 2011, 55% in 2010
- Availability of mid-range accommodations: 53% in 2011, 53% in 2010
- Lots of cultural things to see or experience: 53% in 2011, 53% in 2010
- A fun place for couples: 49% in 2011, 49% in 2010
- Being at a place I’ve never seen before: 49% in 2011, 49% in 2010
- Great shopping: 48% in 2011, 48% in 2010

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Philadelphia & The Countryside (cont’d)

% Rating Factor As Very Important*

- Lots of things for children to see and do: 2011 - 47, 2010 - 20
- Availability of luxury accommodations: 2011 - 47, 2010 - 27
- Within a two-to-four-hour drive from home: 2011 - 46, 2010 - 19
- Unique or local food and cuisine: 2011 - 45, 2010 - 41
- Within a two-hour drive from home: 2011 - 45, 2010 - 36
- A great rural/agricultural area: 2011 - 38, 2010 - 11
- Availability of economy or budget accommodations: 2011 - 36, 2010 - 13
- Having family or friends who live in the region: 2011 - 35, 2010 - 21
- Great opportunities for nature/eco-travel: 2011 - 34, 2010 - 8
- Different or unique local artwork/craftwork: 2011 - 33, 2010 - 15
- Availability of camping or RV facilities: 2011 - 23, 2010 - 4
- Focus on “green travel”:

* Rated 8, 9 or 10 on 10-pt. Importance scale
Product Delivery — Marketable Overnight Trips
Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.

A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.

The degree of association between each factor was then measured on whether Pennsylvania is a place “I would really enjoy visiting.”

In order to get the recent Pennsylvania visitor interested in returning, it is important that the state be perceived as a destination that is exciting, while at the same time is safe, welcoming, attractive to adults, and good for the whole family.
Traveler Priorities

Base: Overnight Marketable Trips

- **Exciting**
- **Worry Free**
- **Adult Atmosphere**
- **Family Destination**
- **Climate**
- **Unique**
- **Sightseeing**
- **Affordable**
- **Luxurious**
- **Entertainment**
- **Sports and Recreation**

*A measure of the degree of association between each factor and whether Destination is a place “I would really enjoy visiting.”*
## Hot Buttons

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A place I would feel welcome</td>
</tr>
<tr>
<td>2</td>
<td>Lots to see and do</td>
</tr>
<tr>
<td>3</td>
<td>Good place to get away and relax</td>
</tr>
<tr>
<td>4</td>
<td>A fun place for a vacation/getaway</td>
</tr>
<tr>
<td>5</td>
<td>Good place for families to visit</td>
</tr>
<tr>
<td>6</td>
<td>Good for adult vacation/getaway</td>
</tr>
<tr>
<td>7</td>
<td>Warm/friendly people</td>
</tr>
<tr>
<td>8</td>
<td>Exciting destination</td>
</tr>
<tr>
<td>9</td>
<td>Very affordable vacation destination</td>
</tr>
<tr>
<td>10</td>
<td>Great place for walking/strolling about</td>
</tr>
<tr>
<td>11</td>
<td>A good place for couples to visit</td>
</tr>
<tr>
<td>12</td>
<td>A place welcoming for children</td>
</tr>
<tr>
<td>13</td>
<td>Great value for the money</td>
</tr>
<tr>
<td>14</td>
<td>Safe place to travel in tourist areas</td>
</tr>
<tr>
<td>15</td>
<td>A fun place for kids</td>
</tr>
<tr>
<td>16</td>
<td>Great shopping</td>
</tr>
</tbody>
</table>

*A measure of the degree of association between each attribute and whether Destination is a place “I would really enjoy visiting.”*
Product Delivery

- Image ratings by recent visitors can be viewed as product ratings such that the recent visitor is, presumably, rating Pennsylvania from his/her experience.

- Recent visitors to Pennsylvania feel that its image’s strengths include a travel experience that offers great live music, is a place they would feel welcome, is good place for families, is welcoming for children, and has wilderness areas.
Pennsylvania’s Product Delivery

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Affordable: 67%
- Climate: 64%
- Worry Free: 64%
- Adult Atmosphere: 64%
- Family Destination: 57%
- Exciting: 54%
- Sightseeing: 54%
- Unique: 45%
- Sports & Recreation: 39%
- Entertainment: 35%
- Luxurious: 34%
Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%

Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 60%
- Good for adult vacation/getaway: 56%
- A good place for couples to visit: 64%
Pennsylvania’s Product Delivery — Exciting

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Exciting: 67%
- A fun place for a vacation/getaway: 72%
- Exciting destination: 62%
Pennsylvania’s Product Delivery — Worry Free

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Worry Free: 62%
- A place I would feel welcome: 73%
- Good place to get away and relax: 53%
- Safe place to travel in tourist areas: 71%
- Warm/friendly people: 53%
Pennsylvania’s Product Delivery — Family Destination

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Family Destination: 69%
- Good place for families to visit: 72%
- A fun place for kids: 62%
- A place welcoming for children: 73%

Pennsylvania's Product Delivery
Pennsylvania’s Product Delivery — Climate

Base: Overnight Marketable Trips

Percent Who Strongly Agree

Climate was perfect for what we wanted to do

Climate

61

Climate was perfect for what we wanted to do

61
Pennsylvania’s Product Delivery — Sightseeing

Base: Overnight Marketable Trips

**Percent Who Strongly Agree**

- Sightseeing: 52%
- Truly beautiful scenery: 45%
- Well-known landmarks: 55%
- Noted for its history: 55%
- Lots to see and do: 53%
- Authentic historical sites: 54%
- Great wilderness areas: 74%
- Great place for walking/strolling about: 63%
- Interesting small towns/villages: 49%
- Excellent State/National parks: 48%
- Interesting cities: 69%
- Great farm stands/farmers' markets: 43%
- Too much to do and see in just one visit: 41%
- Beautiful gardens & parks: 58%
- Great place for antiquing: 58%
- Interesting festivals/fairs: 38%
- Excellent museums/art galleries: 52%
- Authentic & exciting historical re-enactments: 42%
- Great shopping: 53%
- Great place for birding/nature viewing: 39%
Pennsylvania’s Product Delivery — Affordable

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Affordable: 63%
- Great value for the money: 58%
- Very affordable vacation destination: 61%
- Affordable accommodations: 48%
- Very affordable for a getaway weekend: 66%
- Easy to get to: 68%
- Not too far away for a vacation: 70%
- Close enough for a weekend getaway: 71%
Pennsylvania’s Product Delivery — Unique

Percent Who Strongly Agree

- Unique: 56%
- Unique & Interesting customs/traditions: 62%
- Talented artisans: 46%
- Lots of unique local cuisine: 59%

Base: Overnight Marketable Trips
Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%

Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%

Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%

Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%

Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%

Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 73%
- Great for theater and the arts: 71%
- Great live music: 76%
Pennsylvania’s Product Delivery — Luxurious

Percent Who Strongly Agree

- Luxurious: 53%
- First-class hotels: 52%
- First-class resorts: 51%
- Good place to find elegant, sophisticated restaurants: 57%

Base: Overnight Marketable Trips
Pennsylvania’s Product Delivery — Sports & Recreation

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Sports and Recreation: 43%
- Great leisure biking: 37%
- Great camping: 60%
- Great mountain/off-road bicycling: 41%
- Excellent fishing: 41%
- Good place for skiing/winter sports: 35%
- Fun & challenging golf courses: 44%
- Excellent hunting: 47%
- Good place for extreme/adventure sports: 42%
Pennsylvania’s Top 20 Image Attributes

Percent Who Strongly Agree

- Great live music: 76
- Great wilderness areas: 74
- A place I would feel welcome: 73
- A place welcoming for children: 73
- Good place for families to visit: 72
- A fun place for a vacation/getaway: 72
- Close enough for a weekend getaway: 71
- Safe place to travel in tourist areas: 71
- Great for theater and the arts: 71
- Not too far away for a vacation: 70
Pennsylvania’s Top 20 Image Attributes (cont’d)

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Interesting cities: 69%
- Easy to get to: 68%
- A place I'd really enjoy visiting: 66%
- Very affordable for a getaway weekend: 66%
- Truly beautiful scenery: 65%
- Great location for a business: 65%
- A good place for couples to visit: 64%
- Great place for walking/strolling about: 63%
- A fun place for kids: 62%
- Unique & Interesting customs/traditions: 62%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents

Percent who strongly agree

- Great wilderness areas: PA Residents 88%, Non-Residents 69%
- Close enough for a weekend getaway: PA Residents 88%, Non-Residents 66%
- Easy to get to: PA Residents 88%, Non-Residents 62%
- Climate was perfect for what we wanted to do: PA Residents 85%, Non-Residents 54%
- A fun place for a vacation/getaway: PA Residents 85%, Non-Residents 68%
- Good place for families to visit: PA Residents 84%, Non-Residents 69%
- Very affordable for a getaway weekend: PA Residents 80%, Non-Residents 62%
- Not too far away for a vacation: PA Residents 78%, Non-Residents 67%
- Great location for a business meeting/conference/convention: PA Residents 78%, Non-Residents 61%
- Very affordable vacation destination: PA Residents 78%, Non-Residents 56%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents (cont’d)

Base: Overnight Marketable Trips

Percent who strongly agree

- A place welcoming for children: PA Residents 77, Non-Residents 71
- A place I would feel welcome: PA Residents 76, Non-Residents 71
- Truly beautiful scenery: PA Residents 62, Non-Residents 75
- A fun place for kids: PA Residents 75, Non-Residents 58
- Good place to find elegant,..: PA Residents 74, Non-Residents 52
- Lots of unique local cuisine: PA Residents 73, Non-Residents 54
- Great live music: PA Residents 77, Non-Residents 72
- Unique & Interesting customs/traditions: PA Residents 72, Non-Residents 59
- Great camping: PA Residents 72, Non-Residents 57
- Interesting cities: PA Residents 71, Non-Residents 68
Trip Benefits — Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip

Base: Overnight Marketable Trips

Percent of Total

- Relaxed/relieved stress: 56% (2011), 64% (2010)
- Break from the day-to-day: 49% (2011), 55% (2010)
- Created lasting memories: 41% (2011), 41% (2010)
- Enriched relationship with family/friends: 38% (2011), 40% (2010)
- No fixed schedule: 36% (2011), 38% (2010)
- Improved family ties: 18% (2011), 21% (2010)
- Arrived home with great stories: 17% (2011), 17% (2010)
Benefits From Pennsylvania Overnight Trip (cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Visited a place I've never seen before: 15% (2011), 22% (2010)
- Try new things: 15% (2011), 16% (2010)
- Enhanced knowledge of history: 12% (2011), 20% (2010)
- Enhanced cultural experiences: 12% (2011), 16% (2010)
- Physically challenged and energized: 9% (2011), 16% (2010)
- Better outlook on life: 8% (2011), 16% (2010)
- Was pampered: 3% (2011), 5% (2010)
- Gained new skill(s): 1% (2011), 5% (2010)
Pennsylvania Day-Trips
Origin Markets — Pennsylvania Day-Trips
State Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania: 49
- New Jersey: 16
- Maryland: 9
- New York: 9
- Ohio: 6
- Delaware: 4
- West Virginia: 2
- Virginia: 1

Pennsylvania
New Jersey
Maryland
New York
Ohio
Delaware
West Virginia
Virginia
Urban Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

In-State DMA’s

<table>
<thead>
<tr>
<th>Market</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia, PA</td>
<td>24</td>
</tr>
<tr>
<td>Pittsburgh, PA</td>
<td>11</td>
</tr>
<tr>
<td>Harrisburg-Lncstr-Leb-York, PA</td>
<td>8</td>
</tr>
<tr>
<td>Wilkes Barre-Scranton, PA</td>
<td>7</td>
</tr>
<tr>
<td>Johnstown-Altoona, PA</td>
<td>4</td>
</tr>
<tr>
<td>Erie, PA</td>
<td>2</td>
</tr>
</tbody>
</table>

Out-of-State DMA’s

<table>
<thead>
<tr>
<th>Market</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York, NY</td>
<td>17</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>6</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>4</td>
</tr>
<tr>
<td>Cleveland, OH</td>
<td>4</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>2</td>
</tr>
<tr>
<td>Youngstown, OH</td>
<td>2</td>
</tr>
</tbody>
</table>
Traveler Profile — Marketable Day-Trips
Gender

Base: Marketable Day-Trips

Percent of Total

Male
- Pennsylvania: 44%
- US Average: 44%

Female
- Pennsylvania: 56%
- US Average: 56%
Age

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>25-34</td>
<td>14%</td>
<td>17%</td>
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<tr>
<td>35-44</td>
<td>20%</td>
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<tr>
<td>45-54</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>55-64</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Average Age

- Pennsylvania: 47.1
- US Average: 45.8
Race

Base: Marketable Day-Trips

Percent of Total

- **White**: 93% (Pennsylvania), 87% (US Average)
- **African-American**: 3% (Pennsylvania), 5% (US Average)
- **Other**: 4% (Pennsylvania), 8% (US Average)
Hispanic Background

Base: Marketable Day-Trips

Percent of Total

Yes

Pennsylvania: 2
US Average: 6

No

Pennsylvania: 98
US Average: 94
Marital Status

Base: Marketable Day-Trips

Percent of Total

- Married/With partner:
  - Pennsylvania: 69%
  - US Average: 68%

- Never married:
  - Pennsylvania: 22%
  - US Average: 22%

- Divorced/Widowed/ Separated:
  - Pennsylvania: 9%
  - US Average: 10%
Household Size

Base: Marketable Day-Trips

Percent of Total

1 member

2 members

3 members

4 members

5+ members

Average Household Size:

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>2 members</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>3 members</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>4 members</td>
<td>20</td>
<td>21</td>
</tr>
<tr>
<td>5+ members</td>
<td>13</td>
<td>14</td>
</tr>
</tbody>
</table>

Average Household Size: Pennsylvania 3.0 United States 3.0
Children in Household

Base: Marketable Day-Trips

Percent of Total

- No children under 18: 63%
- Any child between 13-17: 15%
- Any child between 6-12: 15%
- Any child under 6: 19%

Pennsylvania
US Average

Any child between 13-17
Any child between 6-12
Any child under 6
Employment

Base: Marketable Day-Trips

Percent of Total

- Full time/self-employed: Pennsylvania 48%, US Average 46%
- Part time: Pennsylvania 10%, US Average 11%
- Not employed/retired/other: Pennsylvania 42%, US Average 44%
Income

Base: Marketable Day-Trips

Percent of Total

- $150K+:
  - Pennsylvania: 7
  - US Average: 7

- $100K-149.9K:
  - Pennsylvania: 18
  - US Average: 17

- $75K-99.9K:
  - Pennsylvania: 15
  - US Average: 15

- $50K-74.9K:
  - Pennsylvania: 25
  - US Average: 22

- $25K-49.9K:
  - Pennsylvania: 24
  - US Average: 26

- Under $25K:
  - Pennsylvania: 11
  - US Average: 14
Trip Planning & Booking — Marketable Day-Trips
Main Reason for Choosing Pennsylvania

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Reason</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited before and wanted to see more</td>
<td>36</td>
<td>31</td>
</tr>
<tr>
<td>Live nearby</td>
<td>26</td>
<td>33</td>
</tr>
<tr>
<td>Recommendation from friend</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>Saw/heard advertisement</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Read an article/Heard a news story</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Planning Cycle

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Planning Cycle</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month or More</td>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td>3 weeks</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>2 weeks</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>17</td>
<td>16</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Same day</td>
<td>6</td>
<td>4</td>
</tr>
</tbody>
</table>
### Information Sources Used for Planning

**Base:** Marketable Day-Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online/Internet</td>
<td>19</td>
<td>23</td>
</tr>
<tr>
<td>Personal experience</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>Advice from friends/relatives</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Books</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Travel guide</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Auto club</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>State tourism office</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Television</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Magazines</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Note: Percentages of the total number of sources used for planning.
Information Sources Used for Planning (cont’d)

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local visitors bureaus/CoC</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Hotel/resort</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Electronic newsletter</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Association/club</td>
<td>&lt;1</td>
<td>2</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>&lt;1</td>
<td>1</td>
</tr>
<tr>
<td>Radio</td>
<td>&lt;1</td>
<td>1</td>
</tr>
</tbody>
</table>
Information Sources Considered Useful for Planning Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Information Source</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online/Internet</td>
<td>33</td>
<td>32</td>
</tr>
<tr>
<td>Personal experience</td>
<td>30</td>
<td>34</td>
</tr>
<tr>
<td>Advice from friends/relatives</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>Books</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Auto club</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Travel guide</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>State tourism office</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Television</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Magazines</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>
Information Sources Considered Useful for Planning Pennsylvania Day-Trip (cont’d)

Base: Marketable Day-Trips

Percent of Total

- **Social Media**: 1 (2011), 1 (2010)

205
Use of Pennsylvania Trip Planning Tools

Percent of Total

- Pennsylvania travel guide: 8% (2011), 10% (2010)
- PURSUITS magazine: 4% (2011), 4% (2010)
- Pennsylvania Facebook page: 3% (2011), 2% (2010)

Base: Marketable Day-Trips
www.visitpa.com Usefulness

Base: Marketable Day-Trips

Percent

- Not Very Useful
- Somewhat Useful
- Very Useful

* Caution - low base size.
Travel Guide Usefulness

Base: Marketable Day-Trips

* Caution - low base size.
Trip Elements Planned Using Internet

Base: Marketable Day-Trips

Percent of Total

- Car route/locations/map: 25% (2011) vs. 27% (2010)
- Local activities/attractions/things to see and do: 18% (2011) vs. 21% (2010)
- Restaurants: 10% (2011) vs. 11% (2010)
- Accommodation: 7% (2011) vs. 12% (2010)
- Flight/train/bus/rental car: 2% (2011) vs. 4% (2010)
- Packages tours/cruises: 2% (2011) vs. 1% (2010)
Reasons for Visiting www.visitpa.com

Base: Marketable Day-Trips

Percent of Total

- To help me decide which Pennsylvania destination to visit:
  - 2011: 55%
  - 2010: 38%

- To obtain more information after I decided to visit:
  - 2011: 44%
  - 2010: 39%

- To learn more about Pennsylvania:
  - 2011: 34%
  - 2010: 33%

- To help me decide to visit Pennsylvania:
  - 2011: 6%
  - 2010: 29%
www.visitpa.com Influence on Planning

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Influence</td>
<td>13</td>
<td>2</td>
</tr>
<tr>
<td>Very little Influence</td>
<td>72</td>
<td>18</td>
</tr>
<tr>
<td>Some Influence</td>
<td>21</td>
<td>59</td>
</tr>
<tr>
<td>Large Influence</td>
<td>16</td>
<td>21</td>
</tr>
</tbody>
</table>

Percent

- No Influence
- Very little Influence
- Some Influence
- Large Influence
Base: Marketable Day-Trips

2011
- No Influence: 6%
- Very little Influence: 66%
- Some Influence: 27%

2010
- No Influence: 6%
- Very little Influence: 29%
- Some Influence: 40%
- Large Influence: 25%

Influence on Visitation
Technology Used by Travelers

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Device</th>
<th>Planning the trip</th>
<th>During the trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop computer</td>
<td>36</td>
<td>2</td>
</tr>
<tr>
<td>Laptop computer</td>
<td>23</td>
<td>10</td>
</tr>
<tr>
<td>Smartphone</td>
<td>10</td>
<td>21</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>2</td>
<td>7</td>
</tr>
</tbody>
</table>
Planning Considerations Beyond Cost

Base: Marketable Day-Trips

Percent of Total

- Destination I wanted to see and experience: 2011 - 38%, 2010 - 30%
- Activities I wanted to do: 2011 - 23%, 2010 - 23%
- Performance/event/occasion I wanted to attend: 2011 - 10%, 2010 - 15%
- Near by destination: 2011 - 8%, 2010 - 11%
- Cost was the only consideration: 2011 - 6%, 2010 - 7%
- Visit Family/friends: 2011 - 5%, 2010 - 4%
- Looking for a certain type of vacation experience: 2011 - 3%, 2010 - 4%
Percent Who Booked In Advance

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>42</td>
</tr>
<tr>
<td>2011</td>
<td>39</td>
</tr>
</tbody>
</table>
Base: Marketable Day-Trips Booked in Advance

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 weeks</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>2 weeks</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>9</td>
<td>22</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Same day</td>
<td>16</td>
<td>7</td>
</tr>
</tbody>
</table>
Use of Vacation Packages and Group Travel

Pre-Paid Package

- 2011: 9%
- 2010: 8%

Escorted Group Tour

- 2011: 13%
- 2010: 12%

Base: Marketable Day-Trips
Marketable Day-Trip Characteristics
Distance Traveled for Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Under 100 Miles: 63% (2011) vs. 70% (2010)
- 100-149 Miles: 26% (2011) vs. 17% (2010)
- 150-199 Miles: 5% (2011) vs. 8% (2010)
- Over 200 Miles: 6% (2011) vs. 5% (2010)

2011 vs. 2010
Transportation Used to Enter Pennsylvania

Base: Marketable Day-Trips

Percent of Total

Personal
- Own car: 87% (2011), 85% (2010)
- Rental car: 3% (2011), 1% (2010)
- Truck/Van/RV: 1% (2011), 5% (2010)
- Bicycle/Motorcycle: <1% (2011), <1% (2010)

Commercial
- Train: 6% (2011), 5% (2010)
- Bus: 3% (2011), 9% (2010)
- Taxi: 1% (2011), <1% (2010)
- Shuttle van: <1% (2011), 2% (2010)
Size of Travel Party

Base: Marketable Day-Trips

Average No. of People

- Adults
- Children under 18

2010:
- Total = 2.8
- Adults = 2.3
- Children under 18 = 0.5

2011:
- Total = 2.9
- Adults = 2.3
- Children under 18 = 0.5

Total = 2.8

Total = 2.9
Composition of Travel Party

Base: Marketable Day-Trips

Percent of Total

- Spouse/Partner: 2011 - 63%, 2010 - 64%
- Child(ren): 2011 - 37%, 2010 - 42%
- Friend(s): 2011 - 16%, 2010 - 16%
- Just Myself: 2011 - 12%, 2010 - 9%
- Other Relative(s): 2011 - 10%, 2010 - 11%
- Parent(s): 2011 - 11%, 2010 - 11%
- Grandparents: 2011 - 1%, 2010 - 3%
- Business Associates: <1
Trip Experiences — Marketable Day-Trips
Things Seen and Experienced on Pennsylvania Day-Trip

Base: Marketable Day-Trips
Percent of Total

- Other shopping: 16% (2011), 20% (2010)
- Scenic drive: 15% (2011), 14% (2010)
- Historical house museum: 8% (2011), 9% (2010)
- Unique shopping: 7% (2011), 6% (2010)
- Farmer's market: 6% (2011), 8% (2010)
- Other historical sites: 5% (2011), 7% (2010)
- Winery/vineyard: 4% (2011), 4% (2010)
Things Seen and Experienced on Pennsylvania Day-Trip (cont’d)

Base: Marketable Day-Trips

Percent of Total

Sports and Recreation

Base: Marketable Day-Trips

Percent of Total

- **Amusement/waterpark**: 16% in 2011, 13% in 2010
- **Other outdoor sport/activity**: 7% in 2011, 4% in 2010
- **Hiking**: 6% in 2011, 5% in 2010
- **Fishing**: 6% in 2011, 4% in 2010
- **Swam in a pool**: 3% in 2011, 2% in 2010
- **Professional/college sports event**: 6% in 2011, 3% in 2010
- **Swam in a lake/river**: 3% in 2011, 2% in 2010
- **Hunting**: 2% in 2011, 1% in 2010
- **Camping**: 5% in 2011, 1% in 2010
- **Biking**: 2% in 2011, 1% in 2010
- **Extreme sports**: <1% in 2011, 1% in 2010
- **Snow skiing/snowboarding**: 1% in 2011, 1% in 2010
Trip Benefits — Marketable Day-Trips
Benefits from Pennsylvania Day-Trip

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percent of Total 2011</th>
<th>Percent of Total 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>A break from the day-to-day environment</td>
<td>56</td>
<td>49</td>
</tr>
<tr>
<td>Relaxed and relieved stress</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>Enjoyed life with no fixed schedule</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Created lasting memories</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Enriched relationship with spouse/children/friends</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Improved family ties</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>Got to visit a place I've never seen</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Got to try new things</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>Enhanced cultural experiences</td>
<td>9</td>
<td>15</td>
</tr>
</tbody>
</table>

Percentages are based on the number of marketable day-trips.
Enhanced knowledge of history
Renewed personal connections
Arrived home with great stories to share
Better outlook on life
Was physically challenged and energized
Was intellectually challenged and energized
Gained new skill(s)
Was pampered

Benefits From Pennsylvania Day-Trip (cont’d)

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced knowledge of history</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>Renewed personal connections</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Arrived home with great stories to share</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Better outlook on life</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Was physically challenged and energized</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Was intellectually challenged and energized</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Gained new skill(s)</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Was pampered</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>