Pennsylvania’s Annual Traveler Profile
2013 Travel Year

December 2014
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>4</td>
</tr>
<tr>
<td>Research Method</td>
<td>5</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>7</td>
</tr>
<tr>
<td>Detailed Findings</td>
<td>23</td>
</tr>
<tr>
<td>Size &amp; Structure of the U.S. Overnight Travel Market</td>
<td>24</td>
</tr>
<tr>
<td>Size &amp; Structure of Pennsylvania’s Travel Market</td>
<td>30</td>
</tr>
<tr>
<td>Pennsylvania Marketable Overnight Trips</td>
<td>45</td>
</tr>
<tr>
<td>Origin Markets</td>
<td>46</td>
</tr>
<tr>
<td>Traveler Profile</td>
<td>55</td>
</tr>
<tr>
<td>Trip Planning &amp; Booking</td>
<td>67</td>
</tr>
<tr>
<td>Trip Characteristics</td>
<td>87</td>
</tr>
<tr>
<td>Trip Experiences</td>
<td>96</td>
</tr>
<tr>
<td>Activities by Origin Market of Traveler</td>
<td>102</td>
</tr>
<tr>
<td>Activities by Absence/Presence of Children in Household</td>
<td>108</td>
</tr>
</tbody>
</table>
# Table of Contents (cont’d)

**Marketable Overnight Trips (cont’d)**

- Regional Attractions Visited ........................................................................................................ 110
- Importance of Factors In Choice of Pennsylvania Tourism Region ........................................ 140
- Product Delivery .......................................................................................................................... 163
- Trip Benefits ............................................................................................................................... 184

**Pennsylvania Marketable Day-Trips** ......................................................................................... 187

- Origin Markets ............................................................................................................................ 188
- Traveler Profile ........................................................................................................................... 191
- Trip Planning & Booking .............................................................................................................. 202
- Trip Characteristics .................................................................................................................... 219
- Trip Experiences ........................................................................................................................ 224
- Trip Benefits ............................................................................................................................... 230
Introduction

2013 OVERVIEW

• Travel and tourism is an important industry for Pennsylvania, providing tens of thousands of jobs for the state’s residents and generating hundreds of millions in tax revenues for the state and local communities.

• In 2013, Pennsylvania hosted an estimated 189.8 million visitors (as measured in person-trips) – a slight increase (+0.3%) from the previous year’s total of 189.2 million.

• The 0.6 million increase in PA’s total visitor volume was derived from the day-trip segment, which posted a 0.6% increase in the number of travelers compared to the slight decrease (-0.3%) for the overnight segment.

• Nationally, total overnight visitor volume grew 2%, reaching a new record high level.
The research for this report was conducted by Longwoods International.

The results consist of:

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

The results are based on results from the Travel USA® annual survey of US travelers. Each quarter, a random cross-section of panel members is sent an e-mail invitation to participate in the survey with a reminder e-mail sent several days later to non-responders.

For the 2013 travel year, this produced 229,726 trips for analysis nationally – 153,730 for the overnight segment and 75,996 for day trips.
Research Method (cont’d)

• The *Travel USA*® program identified 5,658 survey respondents who visited Pennsylvania on an overnight trip in 2013 and 4,577 on a day-trip.

• A follow-up survey was sent to a representative sample of these visitors to augment the information from *Travel USA*®, providing more in-depth information on visitor spending and visitor activity, as well as strategic data on trip characteristics, planning and booking, and visitor impressions of Pennsylvania’s tourism product.

• There were 2,367 total responses for the overnight segment and 1,054 total responses for the day-trip segment from this return sample.

• Estimates of Pennsylvania’s overnight and day-trip volume were based on a number of sources, including Travel USA®, the customized return-to-sample research, and consultations with Tourism Economics.
EXECUTIVE SUMMARY
Executive Summary

PENNSYLVANIA VISITOR VOLUME

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

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

Main Purpose for Pennsylvania Overnight Travel
2009 - 2013

VFR
- 2009: 49%
- 2010: 48%
- 2011: 51%

Marketable
- 2009: 37%
- 2010: 37%
- 2011: 40%

Business
- 2009: 10%
- 2010: 12%
- 2011: 12%

Business-Leisure
- 2010: 8%
- 2011: 9%
- 2012: 4%

- 2010: 3%
- 2011: 3%
- 2012: 3%
Pennsylvania hosted an estimated 125.0 million day-trip travelers in 2013 – a 0.6% increase from 2012.

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

ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Maryland, and Ohio remain the top five origin states for Pennsylvania marketable overnight and day-trip travelers, together accounting for 75% and 86%, respectively, of PA’s total in 2013.

- Pennsylvania was the top origin market for PA’s leisure travelers accounting for 35% of marketable overnight travelers; 46% of marketable day-trip travelers; 28% of overnight VFR travelers; and 46% of the state’s day-trip VFR travelers.

- PA residents comprised a slightly smaller share of the state’s leisure travel in 2013 for each of the main leisure segments than in recent years, indicating travelers are once again traveling further as the effects from the recession continue to fall.

- Pennsylvania was also the top origin state for PA business overnight travelers continuing to account for 30% of the state total in 2013, with New York, New Jersey, and Ohio together accounting for an additional 26% of PA’s overnight business travelers.
Executive Summary

PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region remained the leading region for total overnight visitation (i.e., includes business, leisure and VFR travelers) of the state’s 11 tourism regions, with an estimated 14.7 million person-trips in 2013, followed by Pittsburgh and Its Countryside (11.0 million), Dutch Country Roads (10.4 million), and the Pocono Mountains region (8.6 million) region.

- These four regions accounted for 59% of Pennsylvania’s total overnight person-trips in 2013, a two percentage increase from the previous year.

- The Dutch Country Roads and Philadelphia and The Countryside regions were the state’s two leading regions for marketable overnight leisure trips in 2013, followed by the Pocono Mountains and Pittsburgh and Its Countryside regions.

- With their relatively large population bases, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions remained the leading destinations for both PA overnight business and VFR (visiting friends and relatives) travel in 2013.
Why Pennsylvania?

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

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

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

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

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

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

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

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

Use of Social Media by Pennsylvania’s Marketable Overnight Travelers

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

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

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

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

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

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

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

Trip Experiences

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

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

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

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

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

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

Not surprisingly, Pennsylvania’s resident travelers, on average, viewed the state more favorably on each of the priorities than non-resident travelers who visited the state.
Executive Summary

Benefits from a Pennsylvania Overnight or Day Trip

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

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

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

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

DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

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

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

TRAVELER CHARACTERISTICS BY AGE

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

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

<table>
<thead>
<tr>
<th>Traveler’s Age</th>
<th>Percent With Children Under Age 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>49%</td>
</tr>
<tr>
<td>25-34</td>
<td>64%</td>
</tr>
<tr>
<td>35-44</td>
<td>81%</td>
</tr>
<tr>
<td>45-54</td>
<td>57%</td>
</tr>
<tr>
<td>55-64</td>
<td>19%</td>
</tr>
<tr>
<td>65+</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

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

- Pennsylvania’s marketable overnight travelers in the youngest age group (18-24) were overwhelmingly single (79%).
- There was a distinct shift to married/with a partner (63%) for the 25-34 age group, with a third still reporting as single.
- The vast majority of the state’s marketable overnight travelers aged 35 or above were married/living with a partner (above 70% for each group).
- While the overwhelming majority of travelers in the 65+ age group were married or living with a partner (76%), not surprisingly they had the highest proportion who were widowed while travelers in the age 55-64 age demographic had the highest proportion reporting they were divorced or separated.
Detailed Findings
Size & Structure of US Overnight Travel Market
Overnight travel by Americans increased 2% in 2013 vs. 2012.

Of the nearly 1.5 billion trips taken, 87% were taken for leisure purposes.

Almost half of leisure trips were to visit friends and relatives (VFR), with about 43% were of a trip type that can be influenced by marketing, and approximately 3% were business-leisure trips.

The top six marketable trip types were touring trips, special event travel, outdoor trips, casino trips, city trips, and resort trips.
Size of the US Overnight Travel Market
2010 to 2013

In millions of Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1,367</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>1,413</td>
<td>+3%</td>
</tr>
<tr>
<td>2012</td>
<td>1,451</td>
<td>+3%</td>
</tr>
<tr>
<td>2013</td>
<td>1,480</td>
<td>+2%</td>
</tr>
</tbody>
</table>

Base: Total Overnight Trips
Structure of the US Overnight Travel Market — Trends

Base: Overnight Trips

Percent of Total

- **Visiting friends/relatives**
  - 2013: 44%
  - 2012: 44%
  - 2011: 44%
  - 2010: 43%
  - 2009: 43%
  - 2008: 44%

- **Marketable**
  - 2013: 46%
  - 2012: 46%
  - 2011: 43%
  - 2010: 44%
  - 2009: 45%
  - 2008: 44%

- **Business**
  - 2013: 10%
  - 2012: 10%
  - 2011: 12%
  - 2010: 12%
  - 2009: 12%
  - 2008: 13%

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

Base: Adult Overnight Trips

- Marketable Leisure: 43%
- Visits to Friends/Relatives: 44%
- Business: 10%
- Business-Leisure: 3%
Main Purpose of US Overnight Trips in 2013

Marketable Trips

- Visiting friends/relatives: 44%
- Touring: 7%
- Special event: 7%
- Outdoors: 6%
- Casino: 6%
- City trip: 5%
- Resort: 4%
- Theme park: 4%
- Cruise: 2%
- Golf Trip: 1%
- Ski/Snowboarding: 1%
- Other business trip: 7%
- Conference/Convention: 3%
- Business-Leisure: 3%
Size & Structure of Pennsylvania’s Travel Market
Pennsylvania’s Travel Market

- An estimated 189.8 million trips were taken to and/or within Pennsylvania by US residents in 2013.
  
  *34% were overnight trips and 66% were day trips.*

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

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

- Key marketable day-trip types in 2013 included touring, special events, and shopping.
Total Trips To/Within Pennsylvania in 2013

Total Person-Trips = 189.8 Million

- Day Trips: 125.0 Million (66%)
- Overnight Trips: 64.8 Million (34%)

Total Trips To/Within Pennsylvania in 2013

[Diagram showing the breakdown of total trips into overnight and day trips, with percentages and numbers.]
Pennsylvania’s Overnight Travel Segments
Pennsylvania’s Overnight Trip Market Segments

- Marketable Leisure: 40%
- Visits to Friends/Relatives: 48%
- Business: 9%
- Business-Leisure: 3%

Base: Adult Overnight Trips to Pennsylvania
Pennsylvania’s Leisure Overnight Market Segments by Age of Adult Traveler

Adult travelers from the youngest and oldest generations were far more likely to travel to/within PA to visit friends and family in 2013 than those in the middle age ranges.
Pennsylvania and U.S. Overnight Leisure Segments
By Presence of Children in Household

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

- **Pennsylvania**
  - Visiting Friends/Relatives: 43% Any children, 57% No children under age 18
  - Marketable: 53% Any children, 47% No children under age 18

- **U.S. Average**
  - Visiting Friends/Relatives: 45% Any children, 55% No children under age 18
  - Marketable: 50% Any children, 50% No children under age 18
Main Purpose of Overnight Trips to Pennsylvania in 2013

Base: Adult Overnight Trips

- Visiting friends/relatives: 48%
- Special event: 9%
- Touring: 8%
- Outdoors: 7%
- City trip: 5%
- Theme park: 4%
- Casino: 4%
- Resort: 2%
- Ski/Snowboarding: 1%
- Golf Trip: 1%
- Other business trip: 6%
- Conference/Convention: 3%
- Business-Leisure: 3%

Marketable Trips

Percent of Total
# Regions Visited on Overnight Trips*

*Spent time in region

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

<table>
<thead>
<tr>
<th>Region</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>14.7</td>
<td>14.4</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>11.0</td>
<td>10.9</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>10.4</td>
<td>9.2</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>8.6</td>
<td>9.1</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>5.9</td>
<td>6.6</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>4.8</td>
<td>4.4</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>4.4</td>
<td>4.4</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>4.2</td>
<td>4.6</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>3.7</td>
<td>4.4</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>2.5</td>
<td>2.8</td>
</tr>
</tbody>
</table>

In millions of trips

*2013
*2012
Pennsylvania’s Day-Trip Travel Segments
Pennsylvania’s Day-Trip Market Segments

Base: Adult Day-Trips to Pennsylvania

- Marketable Leisure: 55%
- Visiting Friends/Relatives: 36%
- Business: 7%
- Business-Leisure: 2%

Base: Adult Day-Trips to Pennsylvania
Main Purpose of Pennsylvania 2013 Day-Trips

Marketable Trips

- Visiting friends/relatives: 36%
- Touring: 12%
- Special event: 10%
- Shopping: 9%
- Casino: 6%
- City trip: 5%
- Outdoors: 5%
- Theme park: 4%
- Resort: 2%
- Ski/Snowboarding: 1%
- Golf trip: 1%
- Other business trip: 6%
- Conference/convention: 1%
- Business-leisure: 2%
PA’s day-trip leisure travelers were more likely to visit the state on marketable trips than the state’s overnight travelers and U.S. travelers, on average.
<table>
<thead>
<tr>
<th>Region</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>26.1</td>
<td>25.4</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>17.8</td>
<td>17.1</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>17.6</td>
<td>17.9</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>15.7</td>
<td>15.9</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>11.4</td>
<td>12.0</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>10.8</td>
<td>12.2</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>9.4</td>
<td>10.5</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>8.5</td>
<td>9.6</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>7.5</td>
<td>7.0</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>7.4</td>
<td>7.2</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>6.7</td>
<td>6.5</td>
</tr>
</tbody>
</table>

*Spent time in region
Total will add to more than State total as some tourists visit more than one region.
Pennsylvania 2013 Marketable Overnight Trips

- Main Origin Markets
- Demographic Profile
- Trip Planning & Booking
- Trip Characteristics/Experiences
Origin Markets for Pennsylvania Marketable Overnight Trips
Main Origin States for Pennsylvania’s Marketable Overnight Travelers

Base: Marketable Overnight Trips

Pennsylvania: 35%
New York: 16%
New Jersey: 15%
Maryland: 5%
Ohio: 5%
Virginia: 4%
Florida: 2%
California: 2%
Michigan: 1%

Percent of Total
Main Urban Markets for Pennsylvania’s Marketable Overnight Travelers

Base: Marketable Overnight Trips

In-State DMA’s:
- Philadelphia, PA: 16
- Pittsburgh, PA: 8
- Wilkes Barre-Scranton, PA: 6
- Harrisburg-Lncstr-Leb-York, PA: 5
- Johnstown-Altoona, PA: 3
- Erie, PA: 2

Out-of-State DMA’s:
- New York, NY: 21
- Washington, DC: 6
- Baltimore, MD: 3
- Buffalo, NY: 3
- Cleveland, OH: 2
Main Origin States for Pennsylvania’s Business Overnight Travelers

Base: Business Overnight Trips

- Pennsylvania: 30
- New York: 11
- New Jersey: 8
- Ohio: 7
- California: 5
- Florida: 4
- Maryland: 4
- Texas: 3
- North Carolina: 3
- Michigan: 2

Percent of Total: 49
PA Tourism Regions Visited by Travelers’ State of Residence
Pennsylvania Tourism Regions Visited by New York Residents

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

Percent of Total

- Philadelphia & The Countryside: 22%
- Dutch Country Roads: 22%
- Pocono Mountains: 17%
- Pennsylvania's Great Lakes Region: 10%
- Pennsylvania Wilds: 9%
- Upstate PA/Northeast Pennsylvania Mountains: 8%
- Pittsburgh & Its Countryside: 5%
- Lehigh Valley: 3%
- The Alleghenies: 2%
- Laurel Highlands: 2%
- Valleys of the Susquehanna: 1%
The Pocono Mountains remained the most popular PA destination for marketable overnight travelers from New Jersey in 2013, followed by the Philadelphia & the Countryside.
Pennsylvania Tourism Regions Visited by Ohio Residents

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

- Pittsburgh & Its Countryside: 38%
- Pennsylvania's Great Lakes Region: 15%
- Dutch Country Roads: 8%
- Pennsylvania Wilds: 7%
- The Alleghenies: 7%
- Upstate PA/Northeast Pennsylvania: 5%
- Laurel Highlands: 5%
- Lehigh Valley: 5%
- Valleys of the Susquehanna: 2%
- Poconos Mountains: 2%
- Philadelphia & The Countryside: 2%

Caution – Low Sample Size
Pennsylvania Tourism Regions Visited by Maryland Residents

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dutch Country Roads</td>
<td>34</td>
</tr>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>22</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>10</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>7</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>6</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>3</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>2</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>2</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>2</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>2</td>
</tr>
<tr>
<td>Upstate Pennsylvania/ Northeast Pennsylvania Mountains</td>
<td>1</td>
</tr>
</tbody>
</table>

Caution: Low Sample Size
Traveler Profile — Marketable Overnight Trips
Gender

Base: Marketable Overnight Trips

Percent of Total

Male
- Pennsylvania: 52%
- US Average: 53%

Female
- Pennsylvania: 48%
- US Average: 47%
Age

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>25-34 years</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>35-44 years</td>
<td>20</td>
<td>21</td>
</tr>
<tr>
<td>45-54 years</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>55-64 years</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>65+</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

Average Age

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Age</td>
<td>42.9</td>
<td>42.7</td>
</tr>
</tbody>
</table>
### Race

**Base: Marketable Overnight Trips**

<table>
<thead>
<tr>
<th>Race</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>84</td>
</tr>
<tr>
<td>African-American</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
</tr>
</tbody>
</table>

**Pennsylvania**

- White: 79
- African-American: 9
- Other: 9

**US Average**

- White: 79
- African-American: 9
- Other: 12
Hispanic Background

Base: Marketable Overnight Trips

Percent of Total

- No: 93% (Pennsylvania), 89% (US Average)
- Yes: 7% (Pennsylvania), 11% (US Average)
Marital Status

Base: Marketable Overnight Trips

Percent of Total

- Married/With partner: Pennsylvania 63%, US Average 62%
- Never married: Pennsylvania 26%, US Average 26%
- Divorced/Widowed/ Separated: Pennsylvania 11%, US Average 12%

Pennsylvania
US Average
## Household Size

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>2 members</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>3 members</td>
<td>20</td>
<td>19</td>
</tr>
<tr>
<td>4+ members</td>
<td>31</td>
<td>30</td>
</tr>
</tbody>
</table>

**Average Household Size:**
- **Pennsylvania:** 3.0
- **United States:** 3.0
Presence of Children in Household

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

- No children under 18: Pennsylvania 47%, US Average 50%
- Any child between 13-17: Pennsylvania 22%, US Average 23%
- Any child between 6-12: Pennsylvania 26%, US Average 26%
- Any child under 6: Pennsylvania 22%, US Average 20%

Base: Marketable Overnight Trips
Presence of Children in Household by Age of Adult Traveler

Base: Marketable Overnight Trips

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td>25-34</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>35-44</td>
<td>81%</td>
<td>75%</td>
</tr>
<tr>
<td>45-54</td>
<td>57%</td>
<td>52%</td>
</tr>
<tr>
<td>55-64</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>65 or older</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Education

Base: Marketable Overnight Trips

Percent of Total

- **Post-graduate**
  - Pennsylvania: 16
  - US Average: 17

- **College graduate**
  - Pennsylvania: 41
  - US Average: 40

- **Some college**
  - Pennsylvania: 23
  - US Average: 25

- **High school or less**
  - Pennsylvania: 19
  - US Average: 17

- **Other**
  - Pennsylvania: 1
  - US Average: 1
Employment

Base: Marketable Overnight Trips

Percent of Total

- Full time/self-employed: 52%
- Part time: 12%
- Not employed/retired/other: 36%

Pennsylvania
US Average

65
Income

Base: Marketable Overnight Trips

Percent of Total

- **$150K+**
  - Pennsylvania: 5
  - US Average: 6

- **$100K-$149.9K**
  - Pennsylvania: 18
  - US Average: 16

- **$75K-$99.9k**
  - Pennsylvania: 16
  - US Average: 17

- **$50K-$74.9K**
  - Pennsylvania: 24
  - US Average: 23

- **$30K-$49.9K**
  - Pennsylvania: 20
  - US Average: 19

- **Under $30K**
  - Pennsylvania: 17
  - US Average: 19
Trip Planning & Booking Pennsylvania Marketable Overnight Trips
Main Reason for Choosing Pennsylvania

Base: Marketable Overnight Trips

Percent of Total

- Visited before and wanted to see more: 47% (2013), 47% (2012)
- Live nearby: 21% (2013), 17% (2012)
- Recommendation from friend: 18% (2013), 17% (2012)
- Read an article/Heard a news story: 6% (2013), 8% (2012)
- Saw/heard advertisement: 6% (2013), 8% (2012)
- Read a recommendation on social media: 2% (2013), 3% (2012)
Planning Cycle

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Planning Cycle</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Months or More</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>3-5 Months</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>2 Months</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>1 Month or Less</td>
<td>31</td>
<td>42</td>
</tr>
</tbody>
</table>
Information Sources Used for Planning the Trip

Base: Marketable Overnight Trips

Percent of Total

- **Online/Internet**: 44% (2013), 50% (2012)
- **Personal experience**: 17% (2013), 17% (2012)
- **Advice from friends/relatives**: 12% (2013), 11% (2012)
- **Books**: 12% (2013), 17% (2012)
- **Travel guide**: 9% (2013), 14% (2012)
- **Hotel/resort**: 8% (2013), 11% (2012)
- **Auto club**: 7% (2013), 13% (2012)
- **Social Media**: 7% (2013), 7% (2012)
- **Local visitors bureaus/CoC**: 5% (2013), 3% (2012)
- **Magazines**: 5% (2013), 6% (2012)
## Information Sources Used for Planning the Trip (Cont’d)

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>State tourism office</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Association/club</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Radio</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Newspapers</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Electronic newsletter</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Blogs</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Use of Pennsylvania Tourism Office Trip Planning Tools

Base: Marketable Overnight Trips

Percent of Total

- Pennsylvania travel guide: 24% (2013), 29% (2012)
- Pennsylvania Facebook page: 13% (2013), 16% (2012)
- Blog about Pennsylvania: 12% (2013), 14% (2012)
- PURSUIT magazine: 7% (2013), 9% (2012)
- Pennsylvania Twitter page: 7% (2013), 9% (2012)
Base: Marketable Overnight Trips

2013
Not Very Useful: 1%
Somewhat Useful: 28%
Very Useful: 71%

2012
Not Very Useful: 1%
Somewhat Useful: 21%
Very Useful: 78%

3-Pt. Scale: ◯ Not Very Useful ◇ Somewhat Useful □ Very Useful
Pennsylvania Travel Guide Usefulness

Base: Marketable Overnight Trips

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1</td>
<td>33</td>
<td>65</td>
</tr>
<tr>
<td>2013</td>
<td></td>
<td>35</td>
<td>65</td>
</tr>
</tbody>
</table>

Percent
Websites Used for Planning Pennsylvania Trip

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of Total 2013</th>
<th>Percent of Total 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel websites</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>23</td>
<td>27</td>
</tr>
<tr>
<td>Online booking engines</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Car rental websites</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Airline websites</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
Trip Elements Planned Using Internet

Base: Marketable Overnight Trips

Percent of Total

- Accommodation: 46% (2013), 48% (2012)
- Car route/locations/map: 35% (2013), 37% (2012)
- Local activities/attractions/things to see and do: 30% (2013), 29% (2012)
- Restaurants: 24% (2013), 24% (2012)
- Flight/train/bus/rental car: 9% (2013), 12% (2012)
- Packages tours/cruises: 3% (2013), 6% (2012)
Reasons for Visiting www.visitpa.com

Base: Marketable Overnight Trips

Percent of Total

- To help me decide which Pennsylvania destination to visit
  - 2013: 33%
  - 2012: 37%

- To learn more about Pennsylvania
  - 2013: 28%
  - 2012: 33%

- To obtain more information after I decided to visit
  - 2013: 21%
  - 2012: 32%

- To help me decide to visit Pennsylvania
  - 2013: 16%
  - 2012: 24%
www.visitpa.com Influence on Planning

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>No Influence</th>
<th>Very little Influence</th>
<th>Some Influence</th>
<th>Large Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>3</td>
<td>23</td>
<td>46</td>
<td>28</td>
</tr>
<tr>
<td>2012</td>
<td>3</td>
<td>15</td>
<td>51</td>
<td>32</td>
</tr>
</tbody>
</table>

Percent

- No Influence
- Very little Influence
- Some Influence
- Large Influence

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

Base: Marketable Overnight Trips

2013
- No Influence: 7
- Very little Influence: 9
- Some Influence: 51
- Large Influence: 33

2012
- No Influence: 1
- Very little Influence: 10
- Some Influence: 52
- Large Influence: 37

4-Pt. Scale: No Influence, Very Little Influence, Some Influence, A Large Influence
Technology Used by Travelers

Base: Marketable Overnight Trips

Percent of Total

- Laptop computer: Planning the trip - 47%, During the trip - 32%
- Desktop computer: Planning the trip - 46%, During the trip - 4%
- Smartphone: Planning the trip - 16%, During the trip - 53%
- Tablet computer: Planning the trip - 13%, During the trip - 24%
Social Media Visited by Travelers

Base: Marketable Overnight Trips

Percent of Total

- Facebook: 71%
- Twitter: 23%
- Trip Advisor: 18%
- Pinterest: 18%
- LinkedIn: 16%
- Google+: 16%
- Foursquare: 4%
- Virtual Tourist: 1%
- Xanga: 1%
- Tripl: 1%
- Couchsurfing: 1%
- Trip Say: 1%
Planning Considerations Beyond Cost

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Consideration</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>33</td>
<td>34</td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>18</td>
<td>13</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>16</td>
<td>20</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>12</td>
<td>16</td>
</tr>
<tr>
<td>Nearby destination</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Visit family/friends</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Percent of Total
Percent of Travelers Booking In Advance

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>85</td>
</tr>
<tr>
<td>2013</td>
<td>77</td>
</tr>
</tbody>
</table>
Booking Cycle

Base: Marketable Overnight Trips

Percent of Total

- **6 Months or More**
  - **2012**: 6
  - **2013**: 8

- **3-5 Months**
  - **2012**: 21
  - **2013**: 18

- **2 Months**
  - **2012**: 28
  - **2013**: 18

- **1 Month or Less**
  - **2012**: 44
  - **2013**: 55
Use of Vacation Packages and Group Travel

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Percent of Total</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td>16</td>
<td>24</td>
</tr>
</tbody>
</table>
Trip Characteristics of Pennsylvania’s Marketable Overnight Travelers
Distance Traveled to Pennsylvania

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Distance Traveled to Pennsylvania</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 1,000 Miles</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>500-1,000 Miles</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>300-499 Miles</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>100-299 Miles</td>
<td>54</td>
<td>57</td>
</tr>
<tr>
<td>50-99 Miles</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Under 50 Miles</td>
<td>9</td>
<td>7</td>
</tr>
</tbody>
</table>
Transportation Used to Enter Pennsylvania

Base: Marketable Overnight Trips starting outside Pennsylvania

Percent of Total

**Own car**
- 2013: 84%
- 2012: 82%

**Rental car**
- 2013: 8%
- 2012: 8%

**Truck/Van/RV**
- 2013: 5%
- 2012: 6%

**Bus**
- 2013: 4%
- 2012: 5%

**Plane**
- 2013: 4%
- 2012: 5%

**Train**
- 2013: 3%
- 2012: 1%

**Taxi**
- 2013: 3%
- 2012: 2%

**Shuttle van**
- 2013: 2%
- 2012: 2%

**Personal**

**Commercial**
Transportation Used Inside Pennsylvania

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Personal</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>84%</td>
</tr>
<tr>
<td>Rental car</td>
<td>9%</td>
</tr>
<tr>
<td>Truck/Van/RV</td>
<td>7%</td>
</tr>
<tr>
<td>Bicycle/Motorcycle</td>
<td>1%</td>
</tr>
<tr>
<td>Motor/sailboat</td>
<td>1%</td>
</tr>
<tr>
<td>Bus</td>
<td>9%</td>
</tr>
<tr>
<td>Taxi</td>
<td>6%</td>
</tr>
<tr>
<td>Train</td>
<td>5%</td>
</tr>
<tr>
<td>Shuttle van</td>
<td>3%</td>
</tr>
<tr>
<td>Plane</td>
<td>2%</td>
</tr>
<tr>
<td>Ferry/cruise ship/boat</td>
<td>2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Commercial</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>84%</td>
<td>79%</td>
</tr>
<tr>
<td>Rental car</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Truck/Van/RV</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Bicycle/Motorcycle</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Motor/sailboat</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Bus</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Taxi</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Train</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Shuttle van</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Plane</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Ferry/cruise ship/boat</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>
Total Nights Away

Base: Marketable Overnight Trips

Percent of Total

- 1 Night: 32% (2013), 28% (2012)
- 2 Nights: 33% (2013), 32% (2012)
- 3-6 Nights: 26% (2013), 31% (2012)
- 7+ Nights: 9% (2013), 8% (2012)

Average Number of Nights:

- 2013: 3.1
- 2012: 3.1
Length of Stay

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Pennsylvania</th>
<th>Other Places</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>2.0</td>
<td>0.1</td>
<td>2.1</td>
</tr>
<tr>
<td>2012</td>
<td>2.7</td>
<td>0.2</td>
<td>2.9</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

Percent of Total

- **Hotel**: 42% (2013), 49% (2012)
- **Friends/Relatives House/Cottage/Cabin**: 5% (2013), 10% (2012)
- **Motel**: 7% (2013), 9% (2012)
- **Wilderness Campsite**: 6% (2013), 6% (2012)
- **Rented Campground/trailer park site**: 6% (2013), 7% (2012)
- **Other Accommodation**: 3% (2013), 4% (2012)
- **Bed & Breakfast**: 4% (2013), 3% (2012)
- **Country Inn/Lodge**: 3% (2013), 3% (2012)
- **Own House/Cottage/Cabin**: 1% (2013), 3% (2012)
- **Time Sharing Unit**: 5% (2013), 3% (2012)
- **Seasonally Rented House/Cottage/Cabin**: 2% (2013), 2% (2012)
- **Other Rented House/Cottage/Cabin**: 2% (2013), 3% (2012)
- **Rented Condominium**: 2% (2013), 2% (2012)
- **Indoor water park**: 2% (2013), 2% (2012)
- **State Park Lodge**: 1% (2013), 2% (2012)
- **Working Farm**: <1% (2013), 1% (2012)

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

Base: Marketable Overnight Trips

2013
- Adults: 2.5
- Children under 18: 0.9
Total = 3.4

2012
- Adults: 2.5
- Children under 18: 0.9
Total = 3.4

Average No. of People

- Adults
- Children under 18

Total = 3.4
Composition of Travel Party

Base: Marketable Overnight Trips

Percent of Total

- **Spouse/Partner**
  - 2013: 58%
  - 2012: 66%

- **Child(ren)**
  - 2013: 35%
  - 2012: 39%

- **Friend(s)**
  - 2013: 18%
  - 2012: 16%

- **Just Myself**
  - 2013: 12%
  - 2012: 8%

- **Parent(s)**
  - 2013: 11%
  - 2012: 10%

- **Other Relative(s)**
  - 2013: 10%
  - 2012: 10%

- **Grandparents**
  - 2013: 3%
  - 2012: 1%

- **Business Associates**
  - 2013: 1%
  - 2012: <1%
Trip Experiences — Marketable Overnight Trips
Things Seen and Experienced on Trip

Base: Marketable Overnight Trips

Percent of Total

- Scenic drive: 17% (2013), 17% (2012)
- Historic House/Museum: 17% (2013), 17% (2012)
- Outlet shopping: 15% (2013), 17% (2012)
- Farmer’s market: 11% (2013), 17% (2012)
- Other shopping: 11% (2013), 14% (2012)
- State/national park: 11% (2013), 11% (2012)
- Other historical sites: 9% (2013), 8% (2012)
- Art museum/exhibit: 7% (2013), 7% (2012)
- Civil war site: 6% (2013), 5% (2012)
- Other museums: 6% (2013), 6% (2012)
- Zoo: 13% (2013), 6% (2012)
- Local artist: 6% (2013), 5% (2012)
- Unique shopping: 5% (2013), 5% (2012)
- Historic house tour: 7% (2013), 5% (2012)
Things Seen and Experienced on Trip (Cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Winery/vineyard 4 4
- Brewery 3 3
- Revolutionary war site 3 4
- Guided tour 3 4
- Aquarium 2 5
- Historical re-enactments 2 4
- Pennsylvania-made art or craft work 2 4
- Historic village/re-creation 2
- Caves 2 1
- Bird/Wildlife watching 2 4
- Underground railroad site 1 3
- Coal mine 1 2
- Botanical gardens 1 2

2013
2012
Sports and Recreation

Base: Marketable Overnight Trips

Percent of Total

- Amusement/waterpark: 22% (2013), 14% (2012)
- Camping: 10% (2013), 9% (2012)
- Hiking: 10% (2013), 9% (2012)
- Other outdoor sport/activity: 10% (2013), 8% (2012)
- Swam in a pool: 13% (2013), 7% (2012)
- Professional/collegiate sports event: 6% (2013), 6% (2012)
- Fishing: 5% (2013), 5% (2012)
- Amateur sporting event: 4% (2013), 3% (2012)
- Golfing: 5% (2013), 3% (2012)
- Snow skiing/snowboarding: 5% (2013), 3% (2012)
- Biking: 3% (2013), 3% (2012)
- Swam in a lake/river: 3% (2013), 3% (2012)
Sports and Recreation (Cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Jogging/running: 2013 - 2, 2012 - 4
- Extreme sports: 2013 - 1, 2012 - 1
- Hunting: 2013 - 1, 2012 - 1
- Beach at lake/river: 2013 - 1, 2012 - 2
- Indoor fitness/yoga: 2013 - 1, 2012 - 4
- Horseback riding: 2013 - 1, 2012 - 1
- Spiritual/meditation center: 2013 - 1, 2012 - 1
- Powerboating/sailing: 2013 - 1, 2012 - 1
- Car race: 2013 - 1, 2012 - 2
- Snowmobiling: 2013 - 1, 2012 - 1
- Canoe/kayaking: 2013 - 1, 2012 - 1
Activities by Origin Market of Marketable Overnight Travelers
Pennsylvania had a distinct advantage over other US destinations in attracting NY travelers who were interested in theme parks, historic sites, and museums in 2013.
Main Activities of Travelers from New Jersey on Marketable Overnight Trips to Pennsylvania vs to All US Destinations

Pennsylvania had an advantage over other US destinations in attracting NJ travelers who were interested in historic sites, camping, and skiing/snowboarding in 2013.
Pennsylvania had an advantage over other US destinations in attracting OH travelers who were interested in historic sites, casinos, museums, and sports events in 2013.
Pennsylvania had an advantage over other US destinations in attracting MD travelers who were interested in theme parks, historic sites, zoos, and wineries in 2013.
Pennsylvania’s outdoor recreational opportunities remained a big draw for the state’s resident travelers who took at least one in-state marketable overnight trip in 2013.
Activities by 
Presence/Absence of Children in 
Travelers’ Household
Travelers with children were far more likely to visit a theme park, museum, or national/state park, while those without children were more likely to visit fine dining, casino, or historic site in 2013.
Regional Attractions Visited on 2013 Marketable Overnight Trips
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

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

City of Erie — 31%
Presque Isle State Park — 14%
Erie Zoo & Botanical Gardens — 10%
Splash Lagoon/Waldameer Water Parks — 7%
Erie Art Museum — 7%
Presque Isle Downs & Casino — 6%
Tom Ridge Environmental Center — 5%
Covered Bridges — 4%
Historic House/Museum — 4%
Lake Erie Speedway — 3%
Golf course — 2%
US Brig Niagara/Erie Maritime Museum — 2%
Winery/Vineyard — 2%
Underground Railroad — 2%

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

**Base: Overnight Trips**

### Percent of Total

- **Grove City Shopping Outlets**: 9
- **Cook Forest**: 6
- **Pymatuning State Park**: 6
- **Conneaut Lake**: 5
- **Conneaut Lake Park**: 5
- **Historic House/Museum**: 5
- **Erie National Wildlife Refuge**: 4
- **Oil Creek & Titusville Railroad**: 3
- **Winery/Vineyard**: 3
- **Oil City**: 3
- **Oil Creek State Park**: 2
- **Golf course**: 1
- **Oil Heritage Region**: 1
- **Covered Bridges**: 1

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

Base: Marketable Overnight Trips

Percent of Total

City of Pittsburgh: 33%
Pittsburg Zoo & PPG Aquarium: 13%
Pittsburgh Cultural District: 11%
Kennywood Amusement Park: 11%
Fort Pitt Museum: 10%
Cathedral of Learning: 9%
Carnegie Museums: 8%
Andy Warhol Museum: 8%
Historic House/Museum: 8%
Children’s Museum of Pittsburgh: 6%

*Pittsburgh/Allegheny County
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region* (Cont’d)

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duquesne Incline</td>
<td>5</td>
</tr>
<tr>
<td>Phipps Conservatory &amp; Gardens</td>
<td>5</td>
</tr>
<tr>
<td>College Sports Event</td>
<td>4</td>
</tr>
<tr>
<td>Professional Sports Game (Pittsburgh Steelers/Pirates/Penguins)</td>
<td>4</td>
</tr>
<tr>
<td>National Aviary</td>
<td>3</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>3</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Pittsburgh International Children's Festival</td>
<td>1</td>
</tr>
<tr>
<td>Professional Cultural Performance (Pittsburgh Symphony/Ballet/Opera/Theater)</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Meadows Casino</td>
<td>6</td>
</tr>
<tr>
<td>Moraine State Park</td>
<td>5</td>
</tr>
<tr>
<td>Slippery Rock</td>
<td>4</td>
</tr>
<tr>
<td>Zelienople</td>
<td>3</td>
</tr>
<tr>
<td>A Covered Bridge</td>
<td>3</td>
</tr>
<tr>
<td>Robena Mine Memorial</td>
<td>3</td>
</tr>
<tr>
<td>Meadowcroft Rockshelter and Museum of Rural Life</td>
<td>2</td>
</tr>
<tr>
<td>Bushy Run Battlefield</td>
<td>2</td>
</tr>
<tr>
<td>Crooked Creek State Park/Environmental Learning Center</td>
<td>2</td>
</tr>
<tr>
<td>Greensboro Historic District</td>
<td>2</td>
</tr>
<tr>
<td>Lenape Heights</td>
<td>2</td>
</tr>
</tbody>
</table>

*Remainder of Region
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region* (Cont’d)

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Museum/Activity</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>McConnell's Mill State Park</td>
<td>2</td>
</tr>
<tr>
<td>Jimmy Stewart Museum</td>
<td>2</td>
</tr>
<tr>
<td>Historic Harmony/Harmony Museum</td>
<td>1</td>
</tr>
<tr>
<td>Amish Farms/Countryside</td>
<td>1</td>
</tr>
<tr>
<td>Old Economy Village</td>
<td>1</td>
</tr>
<tr>
<td>Kiski Junction Railroad</td>
<td>1</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>1</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>1</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

Percent of Total

- Fort Ligonier: 17%
- Historic House/Museum: 15%
- Fallingwater/Frank Lloyd Wright House: 13%
- Uniontown: 12%
- Golf course: 11%
- Shanksville/Stonycreek/Flight 93 Memorial: 11%
- Fort Necessity National Battlefield: 10%
- Friendship Hill National Historic Site: 8%
- Nemacolin: 7%
- Seven Springs: 7%
- Meyersdale: 6%
- Idlewild Amusement Park: 6%
- Ohiopyle/Ohiopyle State Park: 5%
- Connellsville: 5%
- Bushy Run Battlefield: 5%
- Other Frank Lloyd Wright Houses: 4%
- Underground Railroad: 3%
- Winery/Vineyard: 3%
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Overnight Trips

Percent of Total

- Historic House/Museum: 11%
- Little Pine State Park: 8%
- Millionaires' Row (Historic Homes): 5%
- Golf course: 5%
- Winery/Vineyard: 4%
- Underground Railroad: 4%
- Peter J. McGovern Little League Museum: 2%
- Piper Aviation Museum: 1%
- Little League World Series & Related Events: 1%

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

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook Forest State Park</td>
<td>14</td>
</tr>
<tr>
<td>Allegheny National Forest</td>
<td>12</td>
</tr>
<tr>
<td>Pine Creek Gorge/Pennsylvania Grand Canyon</td>
<td>6</td>
</tr>
<tr>
<td>Cherry Springs/Dark Sky Preserve</td>
<td>6</td>
</tr>
<tr>
<td>Pennsylvania's Elk Herd/Elk State Park</td>
<td>6</td>
</tr>
<tr>
<td>Golf Course</td>
<td>5</td>
</tr>
<tr>
<td>Kinzua State Park/Kinzua Bridge/Kinzua Dam</td>
<td>5</td>
</tr>
<tr>
<td>Clarion River</td>
<td>5</td>
</tr>
<tr>
<td>Kettle Creek State Park</td>
<td>4</td>
</tr>
<tr>
<td>Punxsutawney/Groundhog Phil</td>
<td>4</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>4</td>
</tr>
<tr>
<td>Black Moshannon State Park</td>
<td>3</td>
</tr>
<tr>
<td>Penn Brad Oil Museum</td>
<td>3</td>
</tr>
</tbody>
</table>

*Remainder of Region
Pennsylvania Attractions/Events — Pennsylvania Wilds Region* (Cont’d)

Base: Overnight Trips

Percent of Total

Pennsylvania Lumber Museum 2
Smethport 2
Winery/Vineyard 2
Eldred World War II Museum & Learning Center 1
The Woolrich Store & Outlet 1
Historic Curtin Village/Eagle Ironworks 1
Quehanna 1
Bucktail State Park 1
American Golf Hall of Fame 1
Red Hill Fish Fossil Site 1
Zippo/Case Museum 1
S.B. Elliott State Park 1
Straub Brewery 1

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

Base: Overnight Trips

Percent of Total

- Knoebels Amusement Park & Resort: 21
- Covered Bridges: 19
- Joseph Priestley House: 13
- Historic Home/Museum: 12
- Winery/Vineyard: 11
- Ricketts Glen State Park: 9
- Underground Railroad: 9
- Shikellamy State Park: 9
- Golf Course: 7
- Bloomsburg Fair: 3

*Caution: low base
Pennsylvania Attractions/Events — The Alleghenies Region*

Base: Overnight Trips

Percent of Total

- Penn State University: 26%
- Penn State Sports Event: 6%
- Covered Bridges: 6%
- Underground Railroad: 4%
- Pennsylvania Military Museum: 4%
- Penn State All Sports Museum: 3%
- Toftrees Golf Resort: 2%
- American Philatelic Society: 2%
- Golf course: 2%
- Historic Home/Museum: 1%
- Bellefonte Museum: 1%
- Tussey Mountain Ski Resort: 1%
- Shavers Creek Environmental Center: 1%
- Central Pennsylvania Festival of the Arts: 1%
- Winery/Vineyard: 1%

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

Base: Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction/Museum/Event</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Bedford Village</td>
<td>5</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>4</td>
</tr>
<tr>
<td>Thunder in the Valley</td>
<td>4</td>
</tr>
<tr>
<td>Altoona Railroad Museum</td>
<td>3</td>
</tr>
<tr>
<td>Johnstown Inclined Plane</td>
<td>3</td>
</tr>
<tr>
<td>Horseshoe Curve</td>
<td>3</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>3</td>
</tr>
<tr>
<td>Bedford Springs</td>
<td>3</td>
</tr>
<tr>
<td>Boyer Candy Company</td>
<td>3</td>
</tr>
<tr>
<td>Allegheny Portage Railroad National Historic Site</td>
<td>2</td>
</tr>
<tr>
<td>Blue Knob State Park</td>
<td>2</td>
</tr>
<tr>
<td>DelGrosso's Amusement Park</td>
<td>2</td>
</tr>
</tbody>
</table>

*Remainder of Region
Pennsylvania Attractions/Events — The Alleghenies Region* (Cont’d)

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Museum/Place</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indian Caverns/Lincoln Caverns</td>
<td>2</td>
</tr>
<tr>
<td>Windber Coal Heritage Center</td>
<td>2</td>
</tr>
<tr>
<td>Johnstown Flood Museum/Memorial</td>
<td>2</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
<tr>
<td>Penn's Cave &amp; Wildlife Park</td>
<td>1</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>1</td>
</tr>
<tr>
<td>Lakemont Park</td>
<td>1</td>
</tr>
<tr>
<td>Raystown Lake</td>
<td>1</td>
</tr>
<tr>
<td>Shawnee State Park</td>
<td>1</td>
</tr>
<tr>
<td>Prince Gallitzin Chapel House</td>
<td>1</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

Percent of Total
- Covered Bridges: 6
- Historic Home/Museum: 4
- Loyalsock State Forest: 4
- Eagle's Mere Historic Village: 2
- Endless Mountains Nature Center: 1
- Underground Railroad: 1
- Golf course: 1
- Old Mill Village Museum: 1
- Ricketts Glen State Park: 1
- Center For Anti-Slavery Studies: 1
- Winery/Vineyard: 1
- Pennsylvania Anthracite Coal Miners Memorial: 1

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

**Base:** Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mohegan Sun at Pocono Downs</td>
<td>12</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>10</td>
</tr>
<tr>
<td>Steamtown National Historic Site</td>
<td>10</td>
</tr>
<tr>
<td>Hickory Run State Park</td>
<td>6</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>6</td>
</tr>
<tr>
<td>Lackawanna Electric Trolley Museum</td>
<td>6</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>5</td>
</tr>
<tr>
<td>The Downs at Hazleton</td>
<td>4</td>
</tr>
<tr>
<td>Lackawanna Coal Mine Tour</td>
<td>4</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>4</td>
</tr>
<tr>
<td>PA Anthracite Coal Museum</td>
<td>4</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Ricketts Glen State Park</td>
<td>2</td>
</tr>
<tr>
<td>Houdini Tour &amp; Museum</td>
<td>1</td>
</tr>
<tr>
<td>Pioneer Tunnel Coal Mine</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight 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>Caesar's Resort</td>
<td>12</td>
</tr>
<tr>
<td>Great Wolf Lodge</td>
<td>10</td>
</tr>
<tr>
<td>The Crossings Premium Outlets</td>
<td>10</td>
</tr>
<tr>
<td>Jim Thorpe</td>
<td>9</td>
</tr>
<tr>
<td>Bushkill Falls</td>
<td>9</td>
</tr>
<tr>
<td>Delaware Water Gap</td>
<td>8</td>
</tr>
<tr>
<td>Pocono Indian Museum</td>
<td>8</td>
</tr>
<tr>
<td>Pocono Raceway</td>
<td>7</td>
</tr>
<tr>
<td>Hickory Run State Park &amp; Big Boulder Field</td>
<td>6</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>5</td>
</tr>
<tr>
<td>Camelback Waterpark</td>
<td>5</td>
</tr>
<tr>
<td>Lake Wallenpaupack</td>
<td>4</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Pocono Mountains Region (Cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Tobyhanna State Park: 4
- Winery/Vineyard: 4
- Historic Home/Museum: 3
- Promised Land State Park: 3
- Gray Towers: 3
- Upper Delaware Scenic & Recreation River: 2
- Old Jail Museum: 2
- Eckley Miners’ Village: 2
- Golf course: 2
- No. 9 Mine & Museum: 2
- Carousel Water & Fun Park: 1
- The Downs at East Stroudsburg: 1
- Underground Railroad: 1
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gettysburg Battlefield/National Military Park</td>
<td>19</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>14</td>
</tr>
<tr>
<td>Gettysburg National Military Park &amp; Museum</td>
<td>13</td>
</tr>
<tr>
<td>Gettysburg Diorama</td>
<td>8</td>
</tr>
<tr>
<td>General Lee's Headquarters</td>
<td>8</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>6</td>
</tr>
<tr>
<td>Eisenhower National Historic Site</td>
<td>5</td>
</tr>
<tr>
<td>Outlet Malls at Gettysburg Village</td>
<td>5</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>3</td>
</tr>
<tr>
<td>Hall of Presidents &amp; First Ladies</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>1</td>
</tr>
<tr>
<td>Land of Little Horses</td>
<td>1</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
</tbody>
</table>

*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net combined attendance of 21%.
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Marketable Overnight Trips

Percent of Total

- HersheyPark: 22%
- The Hershey Story, The Museum on Chocolate Avenue: 11%
- Hershey Gardens: 9%
- Outlets at Hershey: 8%
- Hershey Theater: 5%
- Pennsylvania State Capitol: 3%
- Covered Bridges: 3%
- Historic Home/Museum: 3%
- Indian Echo Caverns: 3%
- Hollywood Casino at Penn National Race Course: 2%
- National Civil War Museum: 2%
- Antique Auto Museum at Hershey: 2%
- Lake Tobias Wildlife Park: 1%
- The State Museum of Pennsylvania: 1%
- Little Buffalo State Park: 1%
- Whitaker Center for Science & the Arts: 1%
- Golf course: 1%

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amish Farms/Countryside</td>
<td>25</td>
</tr>
<tr>
<td>Outlet Mall (Rockvale, Tanger)</td>
<td>19</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>11</td>
</tr>
<tr>
<td>Strasburg Railroad/Traintown</td>
<td>9</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>7</td>
</tr>
<tr>
<td>Dutch Wonderland Family Amusement Park</td>
<td>7</td>
</tr>
<tr>
<td>Lancaster Central Market</td>
<td>6</td>
</tr>
<tr>
<td>People’s Place Quilt Museum</td>
<td>5</td>
</tr>
<tr>
<td>Railroad Museum of Pennsylvania</td>
<td>3</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>3</td>
</tr>
<tr>
<td>Historic Lancaster Walking Tour</td>
<td>2</td>
</tr>
<tr>
<td>National Toy Train Museum</td>
<td>1</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
<tr>
<td>National Watch &amp; Clock Museum</td>
<td>1</td>
</tr>
<tr>
<td>Ephrata Cloister</td>
<td>1</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>1</td>
</tr>
<tr>
<td>Landis Valley Museum</td>
<td>1</td>
</tr>
<tr>
<td>Cherry Crest Adventure Farm</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

Percent of Total

- Utz Quality Foods Factory: 3
- Harley-Davidson Factory: 3
- Gifford Pinchot State Park: 2
- Hanover Shoe Farms: 1
- Wolfgang Candy Company: 1
- Martin's Potato Chip Factory: 1

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

Base: Marketable Overnight Trips

Percent of Total

- Covered Bridges: 2
- Cabela's: 1
- Cornwall Iron Furnace: 1
- VF Outlet Village: 1
- Kings Gap Environmental Education & Training Center: 1
- Union Canal: 1
- Historic Home/Museum: 1
- Underground Railroad: 1
- Hawk Mountain: 1

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

**Base:** Overnight Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bethlehem Sands Casino Resort</td>
<td>20</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>14</td>
</tr>
<tr>
<td>Dorney Park &amp; Wildwater Kingdom</td>
<td>11</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>11</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>6</td>
</tr>
<tr>
<td>Museum of Indian Culture</td>
<td>5</td>
</tr>
<tr>
<td>Crayola Factory</td>
<td>5</td>
</tr>
<tr>
<td>Martin Guitars</td>
<td>4</td>
</tr>
<tr>
<td>The Downs at Lehigh Valley</td>
<td>4</td>
</tr>
<tr>
<td>National Museum of Industrial History</td>
<td>3</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>3</td>
</tr>
<tr>
<td>National Canal Museum</td>
<td>2</td>
</tr>
<tr>
<td>Mack Trucks</td>
<td>2</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberty Bell/Liberty Bell Center</td>
<td>29</td>
</tr>
<tr>
<td>Independence Hall/Independence Visitor Center</td>
<td>23</td>
</tr>
<tr>
<td>Philadelphia Museum of Art</td>
<td>14</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>11</td>
</tr>
<tr>
<td>The Franklin (institute)</td>
<td>10</td>
</tr>
<tr>
<td>National Constitution Center</td>
<td>10</td>
</tr>
<tr>
<td>Philadelphia Zoo</td>
<td>8</td>
</tr>
<tr>
<td>Reading Terminal Market</td>
<td>7</td>
</tr>
<tr>
<td>US Mint</td>
<td>7</td>
</tr>
<tr>
<td>Eastern State Penitentiary Historic Site</td>
<td>6</td>
</tr>
<tr>
<td>African American Museum in Philadelphia</td>
<td>6</td>
</tr>
<tr>
<td>Edgar Allan Poe National Historic Site</td>
<td>4</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please Touch Museum</td>
<td>4</td>
</tr>
<tr>
<td>Independence Seaport Museum</td>
<td>4</td>
</tr>
<tr>
<td>Academy of Natural Sciences</td>
<td>3</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Rodin Museum</td>
<td>3</td>
</tr>
<tr>
<td>Philadelphia Premium Outlets</td>
<td>3</td>
</tr>
<tr>
<td>Pennsylvania Academy of the Fine Arts</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>1</td>
</tr>
<tr>
<td>Thaddeus Kosciuszko National Memorial</td>
<td>1</td>
</tr>
</tbody>
</table>

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

*Base: Marketable Overnight Trips*

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harrah's Chester Casino &amp; Racetrack</td>
<td>2</td>
</tr>
<tr>
<td>Longwood Gardens</td>
<td>2</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>1</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>1</td>
</tr>
<tr>
<td>Marsh Creek State Park</td>
<td>1</td>
</tr>
<tr>
<td>Brandywine Battlefield Park</td>
<td>1</td>
</tr>
<tr>
<td>Hopewell Furnace National Historic Site</td>
<td>1</td>
</tr>
<tr>
<td>American Helicopter Museum</td>
<td>1</td>
</tr>
<tr>
<td>Brandywine River Museum</td>
<td>1</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
<tr>
<td>French Creek State Park</td>
<td>1</td>
</tr>
<tr>
<td>Herr's Snack Factory Tour</td>
<td>1</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

Percent of Total

- King of Prussia Mall: 5
- Covered Bridges: 4
- Sesame Place: 3
- Peddler's Village: 2
- Philadelphia Park Casino & Racetrack: 2
- Delaware Canal State Park: 1
- Prime Outlets: 1
- The Barnes Foundation (art museum): 1
- Historic Home/Museum: 1
- Golf course: 1
- Washington Crossing: 1
- Underground Railroad: 1

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination
- Convenient access by car
- Affordable attractions/events
- Lots of things for adults to see and do
- Within a two-to-four-hour drive from home
- Having family or friends who live in the region
- Unique or local food and cuisine
- Availability of economy or budget accommodations
- Great shopping
- A fun place for couples
- Being at a place I’ve never seen before

* 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*

- Lots of information about the destination on the Internet: 2013 - 48, 2012 - 57
- Lots of things for children to see and do: 2013 - 48, 2012 - 54
- Availability of mid-range accommodations: 2013 - 48, 2012 - 63
- Lots of historic things to see or experience: 2013 - 42, 2012 - 45
- Lots of cultural things to see or experience: 2013 - 39, 2012 - 45
- A great rural/agricultural area: 2013 - 38, 2012 - 40
- Availability of camping or RV facilities: 2013 - 36, 2012 - 42
- Different or unique local artwork/craftwork: 2013 - 35, 2012 - 43
- Focus on “green travel”: 2013 - 32, 2012 - 34

* 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*

- Feeling safe at the destination: 67% (2013), 74% (2012)
- Convenient access by car: 61% (2013), 63% (2012)
- Affordable attractions/events: 57% (2013), 59% (2012)
- Having family or friends who live in the region: 54% (2013), 62% (2012)
- A fun city environment: 51% (2013), 51% (2012)
- Lots of things for adults to see and do: 50% (2013), 56% (2012)
- Unique or local food and cuisine: 47% (2013), 55% (2012)
- Being at a place I've never seen before: 44% (2013), 55% (2012)
- Lots of cultural things to see or experience: 43% (2013), 52% (2012)
- Availability of mid-range accommodations: 42% (2013), 53% (2012)
- Lots of historic things to see or experience: 41% (2013), 42% (2012)
- A fun place for couples: 40% (2013), 45% (2012)

* 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*

- Great shopping: 39% (2013), 43% (2012)
- Availability of economy or budget accommodations: 38% (2013), 48% (2012)
- Within a two-hour drive from home: 36% (2013), 39% (2012)
- Lots of information about the destination on the Internet: 36% (2013), 40% (2012)
- Within a two-to-four-hour drive from home: 36% (2013), 44% (2012)
- Lots of things for children to see and do: 34% (2013), 37% (2012)
- A great rural/agricultural area: 31% (2013), 41% (2012)
- Different or unique local artwork/craftwork: 29% (2013), 39% (2012)
- Great opportunities for nature/eco-travel: 26% (2013), 32% (2012)
- Availability of luxury accommodations: 25% (2013), 39% (2012)
- Focus on “green travel”: 21% (2013), 24% (2012)
- Availability of camping or RV facilities: 17% (2013), 28% (2012)

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>79</td>
<td>74</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>69</td>
<td>75</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>68</td>
<td>75</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>68</td>
<td>73</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>59</td>
<td>64</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>58</td>
<td>64</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>57</td>
<td>64</td>
</tr>
<tr>
<td>Great shopping</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>55</td>
<td>55</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>54</td>
<td>56</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>51</td>
<td>53</td>
</tr>
</tbody>
</table>

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

*Caution: low base
Importance of Factors In Choosing to Visit Laurel Highlands Region (Cont’d)

- Different or unique local artwork/craftwork: 51% (2013), 49% (2012)
- A fun place for couples: 51% (2013), 51% (2012)
- Great opportunities for nature/eco-travel: 50% (2013), 49% (2012)
- Availability of camping or RV facilities: 50% (2013), 49% (2012)
- A great rural/agricultural area: 50% (2013), 49% (2012)
- Lots of information about the destination on the Internet: 47% (2013), 47% (2012)
- Focus on “green travel”**: 46% (2013), 45% (2012)
- Within a two-hour drive from home: 45% (2013), 45% (2012)
- Availability of economy or budget accommodations: 45% (2013), 44% (2012)
- Availability of luxury accommodations: 52% (2013), 51% (2012)
- Lots of things for children to see and do: 56% (2013), 56% (2012)
- Availability of mid-range accommodations: 56% (2013), 56% (2012)

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

*Caution: low base
Importance of Factors In Choosing to Visit Pennsylvania Wilds

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 67% (2013), 69% (2012)
- Affordable attractions/events: 61% (2013), 61% (2012)
- Convenient access by car: 61% (2013), 64% (2012)
- Having family or friends who live in the region: 64% (2013), 64% (2012)
- Being at a place I’ve never seen before: 66% (2013), 68% (2012)
- Lots of things for adults to see and do: 66% (2013), 67% (2012)
- Within a two-to-four-hour drive from home: 54% (2013), 58% (2012)
- Within a two-hour drive from home: 41% (2013), 54% (2012)
- Great opportunities for nature/eco-travel: 55% (2013), 58% (2012)
- Unique or local food and cuisine: 51% (2013), 51% (2012)
- Lots of historic things to see or experience: 58% (2013), 67% (2012)
- A great rural/agricultural area: 57% (2013), 67% (2012)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of things for children to see and do: 33% (2013), 55% (2012)
- Availability of camping or RV facilities: 32% (2013), 49% (2012)
- Different or unique local artwork/craftwork: 32% (2013), 52% (2012)
- Great shopping: 30% (2013), 55% (2012)
- Availability of mid-range accommodations: 30% (2013), 57% (2012)
- Lots of information about the destination on the Internet: 30% (2013), 61% (2012)
- Availability of economy or budget accommodations: 30% (2013), 62% (2012)
- Focus on “green travel”: 29% (2013), 60% (2012)
- A fun place for couples: 28% (2013), 63% (2012)
- Lots of cultural things to see or experience: 28% (2013), 59% (2012)
- A fun city environment: 22% (2013), 56% (2012)
- Availability of luxury accommodations: 17% (2013), 51% (2012)

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

*Caution: low base
Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 70% (2013), 75% (2012)
- Having family or friends who live in the region: 61% (2013), 69% (2012)
- Convenient access by car: 60% (2013), 68% (2012)
- Lots of things for adults to see and do: 49% (2013), 61% (2012)
- Being at a place I’ve never seen before: 48% (2013), 57% (2012)
- Affordable attractions/events: 45% (2013), 68% (2012)
- Lots of historic things to see or experience: 43% (2013), 60% (2012)
- Lots of cultural things to see or experience: 42% (2013), 45% (2012)
- Unique or local food and cuisine: 41% (2013), 56% (2012)
- Availability of mid-range accommodations: 40% (2013), 41% (2012)
- Great shopping: 38% (2013), 41% (2012)
- A great rural/agricultural area: 38% (2013), 46% (2012)

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

*Caution: low base
Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region (Cont’d)

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-hour drive from home</td>
<td>38</td>
<td>50</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>38</td>
<td>46</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>37</td>
<td>49</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>36</td>
<td>40</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>35</td>
<td>51</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>35</td>
<td>51</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>33</td>
<td>47</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>30</td>
<td>55</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>27</td>
<td>35</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>25</td>
<td>46</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>23</td>
<td>36</td>
</tr>
</tbody>
</table>

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

*Caution: low base
## Importance of Factors in Choosing to Visit The Alleghenies Region

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>45</td>
<td>52</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>45</td>
<td>60</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>36</td>
<td>56</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>36</td>
<td>54</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>41</td>
<td>49</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Great shopping</td>
<td>36</td>
<td>41</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>45</td>
<td>45</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: 2013 35%, 2012 40%
- Within a two-hour drive from home: 2013 35%, 2012 37%
- Lots of information about the destination on the Internet: 2013 31%, 2012 35%
- A fun place for couples: 2013 29%, 2012 31%
- Availability of mid-range accommodations: 2013 32%, 2012 37%
- Different or unique local artwork/craftwork: 2013 31%, 2012 37%
- Lots of things for children to see and do: 2013 26%, 2012 31%
- Great opportunities for nature/eco-travel: 2013 30%, 2012 37%
- A fun city environment: 2013 29%, 2012 31%
- Availability of camping or RV facilities: 2013 29%, 2012 40%
- Focus on “green travel”: 2013 25%, 2012 23%
- Availability of luxury accommodations: 2013 19%, 2012 26%

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 2013 - 83%, 2012 - 71%
- Convenient access by car: 2013 - 70%, 2012 - 70%
- Affordable attractions/events: 2013 - 60%, 2012 - 74%
- Lots of things for adults to see and do: 2013 - 52%, 2012 - 71%
- Having family or friends who live in the region: 2013 - 50%, 2012 - 62%
- Availability of mid-range accommodations: 2013 - 48%, 2012 - 56%
- Within a two-to-four-hour drive from home: 2013 - 47%, 2012 - 56%
- Availability of economy or budget accommodations: 2013 - 45%, 2012 - 48%
- Being at a place I've never seen before: 2013 - 42%, 2012 - 48%
- Lots of cultural things to see or experience: 2013 - 42%, 2012 - 55%
- Unique or local food and cuisine: 2013 - 41%, 2012 - 53%
- A fun place for couples: 2013 - 40%, 2012 - 48%

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of information about the destination on the Internet
  - 2012: 37
  - 2013: 42
- Great shopping
  - 2012: 37
  - 2013: 50
- Lots of historic things to see or experience
  - 2012: 37
  - 2013: 54
- Lots of things for children to see and do
  - 2012: 37
  - 2013: 41
- Within a two-hour drive from home
  - 2012: 36
  - 2013: 41
- Great opportunities for nature/eco-travel
  - 2012: 35
  - 2013: 38
- A great rural/agricultural area
  - 2012: 35
  - 2013: 44
- A fun city environment
  - 2012: 33
  - 2013: 46
- Availability of camping or RV facilities
  - 2012: 31
  - 2013: 34
- Availability of luxury accommodations
  - 2012: 30
  - 2013: 33
- Different or unique local artwork/craftwork
  - 2012: 29
  - 2013: 45
- Focus on “green travel”
  - 2012: 24
  - 2013: 30

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 77% (2013), 74% (2012)
- Convenient access by car: 70% (2013), 71% (2012)
- Affordable attractions/events: 66% (2013), 63% (2012)
- Lots of things for adults to see and do: 65% (2013), 60% (2012)
- A fun place for couples: 55% (2013), 48% (2012)
- Availability of mid-range accommodations: 54% (2013), 48% (2012)
- Having family or friends who live in the region: 48% (2013), 48% (2012)
- Within a two-to-four-hour drive from home: 55% (2013), 47% (2012)
- Being at a place I've never seen before: 55% (2013), 46% (2012)
- Lots of information about the destination on the Internet: 49% (2013), 47% (2012)
- Within a two-hour drive from home: 52% (2013), 45% (2012)
- Lots of cultural things to see or experience: 46% (2013), 44% (2012)

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

% Rating Factor As Very Important*

- Unique or local food and cuisine: 49% (2013), 44% (2012)
- Great shopping: 44% (2013), 44% (2012)
- Availability of economy or budget accommodations: 43% (2013), 44% (2012)
- Lots of historic things to see or experience: 40% (2013), 43% (2012)
- Lots of things for children to see and do: 42% (2013), 38% (2012)
- A fun city environment: 39% (2013), 38% (2012)
- A great rural/agricultural area: 37% (2013), 38% (2012)
- Availability of luxury accommodations: 37% (2013), 37% (2012)
- Great opportunities for nature/eco-travel: 40% (2013), 37% (2012)
- Different or unique local artwork/craftwork: 36% (2013), 32% (2012)
- Focus on “green travel”: 27% (2013), 29% (2012)
- Availability of camping or RV facilities: 30% (2013), 21% (2012)

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

**Base:** Marketable Overnight Trips

#### % Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>78</td>
<td>80</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>75</td>
<td>75</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>71</td>
<td>71</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>59</td>
<td>70</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>49</td>
<td>57</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>48</td>
<td>56</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>47</td>
<td>57</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>47</td>
<td>64</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>47</td>
<td>52</td>
</tr>
<tr>
<td>Being at a place I've never seen before</td>
<td>43</td>
<td>51</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>42</td>
<td>55</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>40</td>
<td>60</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

% Rating Factor As Very Important*

- Great shopping: 2013 - 40, 2012 - 57
- Lots of things for children to see and do: 2013 - 38, 2012 - 57
- A fun city environment: 2013 - 37, 2012 - 57
- A fun place for couples: 2013 - 36, 2012 - 45
- Different or unique local artwork/craftwork: 2013 - 27, 2012 - 45
- Availability of luxury accommodations: 2013 - 23, 2012 - 45
- Great opportunities for nature/eco-travel: 2013 - 21, 2012 - 40
- Having family or friends who live in the region: 2013 - 20, 2012 - 36
- Availability of camping or RV facilities: 2013 - 19, 2012 - 30
- Focus on “green travel”: 2013 - 17, 2012 - 38

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

**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>79/75</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>67/79</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>58/61</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>56/70</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>46/53</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>47/51</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>46/52</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>46/57</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>44/53</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>43/56</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>42/46</td>
</tr>
<tr>
<td>Great shopping</td>
<td>41/43</td>
</tr>
</tbody>
</table>

* 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*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>40</td>
<td>42</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>39</td>
<td>42</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>38</td>
<td>46</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>36</td>
<td>49</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>35</td>
<td>49</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>33</td>
<td>42</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>33</td>
<td>42</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>27</td>
<td>26</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>26</td>
<td>30</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>25</td>
<td>41</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>20</td>
<td>26</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination
  - 2013: 74%
  - 2012: 71%

- Affordable attractions/events
  - 2013: 69%
  - 2012: 63%

- Convenient access by car
  - 2013: 67%
  - 2012: 60%

- Lots of things for adults to see and do
  - 2013: 61%
  - 2012: 57%

- A fun city environment
  - 2013: 59%
  - 2012: 54%

- Lots of historic things to see or experience
  - 2013: 57%
  - 2012: 56%

- Unique or local food and cuisine
  - 2013: 54%
  - 2012: 49%

- Being at a place I’ve never seen before
  - 2013: 52%
  - 2012: 45%

- Lots of cultural things to see or experience
  - 2013: 51%
  - 2012: 44%

- Availability of mid-range accommodations
  - 2013: 53%
  - 2012: 46%

- Lots of information about the destination on the Internet
  - 2013: 47%
  - 2012: 46%

- Within a two-hour drive from home
  - 2013: 47%
  - 2012: 45%

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

#### Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>42</td>
<td>41</td>
</tr>
<tr>
<td>Great shopping</td>
<td>36</td>
<td>40</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>40</td>
<td>46</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>37</td>
<td>36</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>31</td>
<td>44</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>29</td>
<td>28</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>22</td>
<td>29</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>13</td>
<td>20</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
Product Delivery — Marketable Overnight Trips
Traveler Priorities

- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.

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

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

- To motivate Pennsylvania visitors to return, it is important that the state be perceived as a destination that is exciting, attractive for adult vacation, while at the same time safe and worry-free and family-friendly.
Traveler Priorities

Base: Overnight Trips

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

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

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

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

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

Pennsylvania’s image strengths among recent visitors include proximity, beautiful scenery, well-known landmarks, a good place for adults and for families to visit and it’s history. Pennsylvania is also seen as a fun, relaxing, welcoming place with lots to see and do.
Pennsylvania’s Product Delivery

Base: Marketable Overnight Trips

*Percent Who Strongly Agree*

- Exciting: 68%
- Adult Atmosphere: 71%
- Worry Free: 71%
- Family Destination: 70%
- Climate: 67%
- Affordable: 70%
- Sightseeing: 66%
- Unique: 60%
- Entertainment: 53%
- Luxurious: 56%
- Sports and Recreation: 56%
Pennsylvania’s Product Delivery — Exciting

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Exciting: 68%
- A fun place for a vacation/getaway: 73%
- Exciting destination: 64%
Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Adult Atmosphere: 71%
- Good for adult vacation/getaway: 74%
- A good place for couples to visit: 67%
Pennsylvania’s Product Delivery — Worry Free

**Base: Marketable Overnight Trips**

**Percent Who Strongly Agree**

- **Worry Free**: 71%
- **A place I would feel welcome**: 72%
- **Good place to get away and relax**: 73%
- **Safe place to travel in tourist areas**: 74%
- **Warm/friendly people**: 67%
Pennsylvania’s Product Delivery — Family Destination

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Family Destination: 70%
- Good place for families to visit: 74%
- A place welcoming for children: 70%
- A fun place for kids: 67%
Climate was perfect for what we wanted to do

Percent Who Strongly Agree

Base: Marketable Overnight Trips

Climate

Climate was perfect for what we wanted to do
Pennsylvania’s Product Delivery — Affordable

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Affordable: 70
- Affordable accommodations: 67
- Great value for the money: 66
- Very affordable vacation destination: 66
- Very affordable for a getaway weekend: 66
- Easy to get to: 75
- Not too far away for a vacation: 74
- Close enough for a weekend getaway: 74
## Pennsylvania’s Product Delivery — Sightseeing

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>66</td>
</tr>
<tr>
<td>Lots to see and do</td>
<td>73</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>75</td>
</tr>
<tr>
<td>Great place for walking/strolling about</td>
<td>68</td>
</tr>
<tr>
<td>Well-known landmarks</td>
<td>74</td>
</tr>
<tr>
<td>Interesting cities</td>
<td>64</td>
</tr>
<tr>
<td>Interesting festivals/ fairs</td>
<td>63</td>
</tr>
<tr>
<td>Beautiful gardens &amp; parks</td>
<td>65</td>
</tr>
<tr>
<td>Interesting small towns/villages</td>
<td>68</td>
</tr>
<tr>
<td>Great shopping</td>
<td>62</td>
</tr>
<tr>
<td>Excellent State/National parks</td>
<td>67</td>
</tr>
<tr>
<td>Great farm stands/farmers’ markets</td>
<td>65</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>62</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>73</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>71</td>
</tr>
<tr>
<td>Authentic &amp; exciting historical re-enactments</td>
<td>62</td>
</tr>
<tr>
<td>Great place for antiquing</td>
<td>60</td>
</tr>
<tr>
<td>Too much to do and see in just one visit</td>
<td>63</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>62</td>
</tr>
<tr>
<td>Great place for birding/nature viewing</td>
<td>61</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Unique

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Unique: 60%
- Unique & Interesting customs/traditions: 62%
- Lots of unique local cuisine: 60%
- Talented artisans: 59%
Pennsylvania’s Product Delivery — Entertainment

Percent Who Strongly Agree

- Entertainment: 53
- Great live music: 52
- Great for theater and the arts: 55

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

Percent Who Strongly Agree

- Luxurious: 56%
- First-class hotels: 58%
- Good place to find elegant, sophisticated restaurants: 57%
- First-class resorts: 53%

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports and Recreation</td>
<td>56</td>
</tr>
<tr>
<td>Great leisure biking</td>
<td>59</td>
</tr>
<tr>
<td>Great camping</td>
<td>60</td>
</tr>
<tr>
<td>Excellent fishing</td>
<td>58</td>
</tr>
<tr>
<td>Great mountain/off-road bicycling</td>
<td>53</td>
</tr>
<tr>
<td>Good place for extreme/adventure sports</td>
<td>55</td>
</tr>
<tr>
<td>Fun &amp; challenging golf courses</td>
<td>50</td>
</tr>
<tr>
<td>Good place for skiing/winter sports</td>
<td>58</td>
</tr>
<tr>
<td>Excellent hunting</td>
<td>57</td>
</tr>
</tbody>
</table>
Pennsylvania’s Top 20 Image Attributes

Percent Who Strongly Agree

- Easy to get to: 75%
- Truly beautiful scenery: 75%
- Well-known landmarks: 74%
- Not too far away for a vacation: 74%
- Good place for families to visit: 74%
- Safe place to travel in tourist areas: 74%
- Good for adult vacation/getaway: 74%
- Close enough for a weekend getaway: 74%
- Authentic historical sites: 73%
- A fun place for a vacation/getaway: 73%

Base: Marketable Overnight Trips
Pennsylvania’s Top 20 Image Attributes (Cont’d)

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Good place to get away and relax: 73%
- Lots to see and do: 73%
- A place I would feel welcome: 72%
- Noted for its history: 71%
- A place welcoming for children: 70%
- Great place for walking/strolling about: 68%
- Interesting small towns/villages: 68%
- A good place for couples to visit: 67%
- Affordable accommodations: 67%
- Warm/friendly people: 67%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents

Base: Marketable Overnight Trips

Percent who strongly agree

- Not too far away for a vacation: 80% (PA Residents), 71% (Non-Residents)
- Truly beautiful scenery: 80% (PA Residents), 72% (Non-Residents)
- Good for adult vacation/getaway: 78% (PA Residents), 72% (Non-Residents)
- Easy to get to: 78% (PA Residents), 74% (Non-Residents)
- Close enough for a weekend getaway: 77% (PA Residents), 72% (Non-Residents)
- Good place to get away and relax: 77% (PA Residents), 71% (Non-Residents)
- Well-known landmarks: 77% (PA Residents), 72% (Non-Residents)
- Safe place to travel in tourist areas: 77% (PA Residents), 72% (Non-Residents)
- A fun place for a vacation/getaway: 77% (PA Residents), 71% (Non-Residents)
- Good place for families to visit: 77% (PA Residents), 72% (Non-Residents)
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents (Cont’d)

Base: Marketable Overnight Trips

Percent who strongly agree

- Lots to see and do: PA Residents 76, Non-Residents 71
- Authentic historical sites: PA Residents 74, Non-Residents 73
- A place welcoming for children: PA Residents 74, Non-Residents 68
- A place I would feel welcome: PA Residents 74, Non-Residents 71
- Warm/friendly people: PA Residents 74, Non-Residents 64
- Climate was perfect for what we…: PA Residents 73, Non-Residents 63
- Great wilderness areas: PA Residents 72, Non-Residents 57
- A fun place for kids: PA Residents 72, Non-Residents 64
- Excellent State/National parks: PA Residents 71, Non-Residents 64
- Great value for the money: PA Residents 71, Non-Residents 63
Trip Benefits — Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percent of Total 2013</th>
<th>Percent of Total 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxed/relieved stress</td>
<td>65</td>
<td>65</td>
</tr>
<tr>
<td>Break from the day-to-day</td>
<td>52</td>
<td>46</td>
</tr>
<tr>
<td>Created lasting memories</td>
<td>39</td>
<td>37</td>
</tr>
<tr>
<td>Enriched relationship with family/friends</td>
<td>35</td>
<td>34</td>
</tr>
<tr>
<td>No fixed schedule</td>
<td>33</td>
<td>34</td>
</tr>
<tr>
<td>Improved family ties</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Renewed personal connections</td>
<td>20</td>
<td>15</td>
</tr>
<tr>
<td>Visited a place I've never seen before</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>Arrived home with great stories</td>
<td>19</td>
<td>18</td>
</tr>
</tbody>
</table>
Benefits From Pennsylvania Overnight Trip

Base: Marketable Overnight Trips

Percent of Total

- Enhanced knowledge of history: 2013 (17%), 2012 (17%)
- Enhanced cultural experiences: 2013 (16%), 2012 (14%)
- Try new things: 2013 (15%), 2012 (15%)
- Physically challenged and energized: 2013 (11%), 2012 (11%)
- Better outlook on life: 2013 (9%), 2012 (11%)
- Intellectually challenged and energized: 2013 (8%), 2012 (8%)
- Was pampered: 2013 (6%), 2012 (8%)
- Gained new skill(s): 2013 (4%), 2012 (3%)
Pennsylvania Day-Trips
Origin Markets — Pennsylvania Day-Trips
State Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania: 48%
- New Jersey: 19%
- New York: 10%
- Maryland: 6%
- Ohio: 5%
- Virginia: 2%
- Delaware: 2%
- West Virginia: 2%
Urban Origin Markets – Marketable Day-Trips

In-State DMA’s
- Philadelphia, PA: 23%
- Pittsburgh, PA: 10%
- Harrisburg-Lncstr-Leb-York, PA: 8%
- Wilkes Barre-Scranton, PA: 7%
- Johnstown-Altoona, PA: 4%
- Erie, PA: 2%

Out-of-State DMA’s
- New York, NY: 19%
- Washington, DC: 5%
- Baltimore, MD: 4%
- Cleveland, OH: 3%
- Buffalo, NY: 2%
- Youngstown, OH: 2%
Traveler Profile — Marketable Day-Trips
Gender

Base: Marketable Day-Trips

Percent of Total

Male
- Pennsylvania: 48%
- US Average: 49%

Female
- Pennsylvania: 52%
- US Average: 51%
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>12</td>
<td>14</td>
</tr>
<tr>
<td>25-34</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>35-44</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>45-54</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>55-64</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>65+</td>
<td>15</td>
<td>13</td>
</tr>
</tbody>
</table>

Average Age: Pennsylvania - 45.1, US Average - 43.7
Race

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Race</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>87</td>
<td>82</td>
</tr>
<tr>
<td>African-American</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>11</td>
</tr>
</tbody>
</table>

Pennsylvania

US Average
Hispanic Background

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>95</td>
<td>91</td>
</tr>
<tr>
<td>Yes</td>
<td>5</td>
<td>9</td>
</tr>
</tbody>
</table>

Pennsylvania
US Average
Marital Status

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/With partner</td>
<td>Pennsylvania: 64</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Never married</td>
<td>Pennsylvania: 24</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Divorced/Widowed/ Separated</td>
<td>Pennsylvania: 12</td>
</tr>
</tbody>
</table>

196
Household Size

Base: Marketable Day-Trips

Percent of Total

1 member: Pennsylvania 18, US Average 18
2 members: Pennsylvania 36, US Average 34
3 members: Pennsylvania 18, US Average 19
4+ members: Pennsylvania 28, US Average 29

Average Household Size:
- Pennsylvania: 2.8
- United States: 2.9
Children in Household

Base: Marketable Day-Trips

Percent of Total

- No children under 18: Pennsylvania 54%, US Average 52%
- Any child between 13-17: Pennsylvania 21%, US Average 22%
- Any child between 6-12: Pennsylvania 21%, US Average 24%
- Any child under 6: Pennsylvania 19%, US Average 19%

Pennsylvania
US Average
Education

Base: Marketable Day-Trips

Percent of Total

- **Post-graduate**: Pennsylvania = 15%, US Average = 15%
- **College graduate**: Pennsylvania = 38%, US Average = 37%
- **Some college**: Pennsylvania = 26%, US Average = 28%
- **High school or less**: Pennsylvania = 20%, US Average = 19%
- **Other**: Pennsylvania = 1%, US Average = 1%

Pennsylvania

US Average
Employment

Base: Marketable Day-Trips

Percent of Total

- Full time/self-employed: 47%
- Part time: 11%
- Not employed/retired/other: 42%

Pennsylvania vs. US Average

- Pennsylvania: 47%
- US Average: 47%
- Pennsylvania: 11%
- US Average: 11%
- Pennsylvania: 42%
- US Average: 42%

200
### Income

**Base: Marketable Day-Trips**

#### Percent of Total

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $30K</td>
<td>20</td>
<td>24</td>
</tr>
<tr>
<td>$30K-$49.9K</td>
<td>20</td>
<td>21</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>24</td>
<td>23</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>$100K-$149.9K</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>$150K+</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

**Pennsylvania**

- Under $30K: 20%
- $30K-$49.9K: 20%
- $50K-$74.9K: 24%
- $75K-$99.9K: 14%
- $100K-$149.9K: 13%
- $150K+: 5%

**US Average**

- Under $30K: 24%
- $30K-$49.9K: 21%
- $50K-$74.9K: 23%
- $75K-$99.9K: 14%
- $100K-$149.9K: 17%
- $150K+: 5%
Trip Planning & Booking — Marketable Day-Trips
Main Reason for Choosing Pennsylvania

Base: Marketable Day-Trips

Percent of Total

- Visited before and wanted to see more: 2013 - 41%, 2012 - 44%
- Live nearby: 2013 - 33%, 2012 - 34%
- Recommendation from friend: 2013 - 10%, 2012 - 11%
- Read an article/Heard a news story: 2013 - 8%, 2012 - 4%
- Saw/heard advertisement: 2013 - 7%, 2012 - 7%
- Read a recommendation on social media: 2013 - 1%, 2012 - <1%
Planning Cycle

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month or More</td>
<td>28</td>
<td>21</td>
</tr>
<tr>
<td>3 weeks</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>2 weeks</td>
<td>22</td>
<td>26</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>13</td>
<td>16</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>18</td>
<td>23</td>
</tr>
<tr>
<td>Same day</td>
<td>8</td>
<td>4</td>
</tr>
</tbody>
</table>
Information Sources Used for Planning

Base: Marketable Day-Trips

Percent of Total

- Personal experience: 2013 - 24%, 2012 - 15%
- Online/Internet: 2013 - 26%, 2012 - 20%
- Advice from friends/relatives: 2013 - 13%, 2012 - 9%
- Radio: 2013 - 9%, 2012 - 3%
- Auto club: 2013 - 7%, 2012 - 6%
- Books: 2013 - 6%, 2012 - 9%
- Television: 2013 - 6%, 2012 - 6%
- Magazines: 2013 - 5%, 2012 - 6%
- State tourism office: 2013 - 4%, 2012 - 5%
Information Sources Used for Planning (Cont’d)

Base: Marketable Day-Trips

Percent of Total

- **Travel guide**
  - 2013: 4
  - 2012: 13

- **Newspapers**
  - 2013: 4
  - 2012: 5

- **Hotel/resort**
  - 2013: 3
  - 2012: 5

- **Social Media**
  - 2013: 3
  - 2012: 6

- **Local visitors bureaus/CoC**
  - 2013: 3
  - 2012: 5

- **Electronic newsletter**
  - 2013: 2
  - 2012: 1

- **A toll-free number**
  - 2013: 1
  - 2012: 3

- **Association/club**
  - 2013: 1
  - 2012: 1

- **Travel Agent**
  - 2013: <1
  - 2012: 1

206
Use of Pennsylvania Trip Planning Tools

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania travel guide: 16% (2013), 14% (2012)
- PURSUITS magazine: 8% (2013), 6% (2012)
- Blog about Pennsylvania: 7% (2013), 7% (2012)
- Pennsylvania Facebook page: 7% (2013), 7% (2012)
- Pennsylvania Twitter page: 4% (2013), 3% (2012)
www.visitpa.com Usefulness

Base: Marketable Day-Trips

2013

- Very Useful: 84%
- Somewhat Useful: 14%
- Not Very Useful: 2%

2012

- Very Useful: 69%
- Somewhat Useful: 31%

* Caution - low base size.
Travel Guide Usefulness

Base: Marketable Day-Trips

Percent

Very Useful Somewhat Useful Not Very Useful

2013

2012

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

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Element</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local activities/attractions/</td>
<td>31</td>
<td>22</td>
</tr>
<tr>
<td>things to see and do</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car route/locations/map</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Restaurants</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Accommodation</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Flight/train/bus/rental car</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Packages tours/cruises</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
Reasons for Visiting [link: www.visitpa.com]

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Reason</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>To help me decide which Pennsylvania destination to visit</td>
<td>55</td>
<td>49</td>
</tr>
<tr>
<td>To help me decide to visit Pennsylvania</td>
<td>18</td>
<td>24</td>
</tr>
<tr>
<td>To learn more about Pennsylvania</td>
<td>14</td>
<td>15</td>
</tr>
<tr>
<td>To obtain more information after I decided to visit</td>
<td>13</td>
<td>11</td>
</tr>
</tbody>
</table>

Percent of Total
www.visitpa.com Influence on Planning

Base: Marketable Day-Trips

Percent

2013

2012

Large Influence  Some Influence  Very Little Influence  No Influence

2013:
- 20% Large Influence
- 50% Some Influence
- 25% Very Little Influence
- 5% No Influence

2012:
- 25% Large Influence
- 56% Some Influence
- 15% Very Little Influence
- 3% No Influence

Total 212 marketable day-trips.
Influence on Visitation

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Large Influence</th>
<th>Some Influence</th>
<th>Very Little Influence</th>
<th>No Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>30</td>
<td>59</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>2013</td>
<td>29</td>
<td>49</td>
<td>14</td>
<td>8</td>
</tr>
</tbody>
</table>

Percent

- Large Influence
- Some Influence
- Very Little Influence
- No Influence
Technology Used by Travelers

Base: Marketable Day-Trips

Percent of Total

- Desktop computer: 3% (Planning the trip), 48% (During the trip)
- Laptop computer: 20% (Planning the trip), 35% (During the trip)
- Smartphone: 17% (Planning the trip), 53% (During the trip)
- Tablet computer: 14% (Planning the trip), 17% (During the trip)
Planning Considerations Beyond Cost

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Percent of Total</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>30</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>25</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>12</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>12</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Near by destination</td>
<td>8</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Visit Family/friends</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
Percent Who Booked In Advance

Base: Marketable Day-Trips

Percent of Total

- 2012: 52%
- 2013: 53%

2012

2013
Booking Cycle

Base: Marketable Day-Trips Booked in Advance

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 1 month in advance</td>
<td>24</td>
<td>27</td>
</tr>
<tr>
<td>3 weeks</td>
<td>18</td>
<td>8</td>
</tr>
<tr>
<td>2 weeks</td>
<td>24</td>
<td>6</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>10</td>
<td>21</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>14</td>
<td>24</td>
</tr>
<tr>
<td>Same day</td>
<td>11</td>
<td>14</td>
</tr>
</tbody>
</table>
Use of Vacation Packages and Group Travel

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Service Type</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Escort Group Tour</td>
<td>14</td>
<td>12</td>
</tr>
</tbody>
</table>

2013: 14% 2012: 12%
Marketable Day-Trip Characteristics
Distance Traveled for Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Under 100 Miles: 58% (2013), 63% (2012)
- 100-149 Miles: 24% (2013), 22% (2012)
- 150-199 Miles: 10% (2013), 9% (2012)
- Over 200 Miles: 8% (2013), 6% (2012)
Transportation Used to Enter Pennsylvania

Base: Marketable Day-Trips

Personal

<table>
<thead>
<tr>
<th>Transportation Used</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>86</td>
<td>82</td>
</tr>
<tr>
<td>Bicycle/Motorcycle</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>Rental car</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Truck/Van/RV</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Bus</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Train</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Plane</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Shuttle van</td>
<td>&lt;1</td>
<td>1</td>
</tr>
<tr>
<td>Taxi</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

Commercial
Composition of Travel Party

Base: Marketable Day-Trips

Percent of Total

- **Spouse/Partner**
  - 2013: 62%
  - 2012: 57%

- **Child(ren)**
  - 2013: 28%
  - 2012: 33%

- **Friend(s)**
  - 2013: 17%
  - 2012: 21%

- **Other Relative(s)**
  - 2013: 13%
  - 2012: 10%

- **Just Myself**
  - 2013: 12%
  - 2012: 10%

- **Parent(s)**
  - 2013: 12%
  - 2012: 10%

- **Grandparents**
  - 2013: 2%
  - 2012: 1%
Trip Experiences — Marketable Day-Trips
## Things Seen and Experienced on Pennsylvania Day-Trip

**Base: Marketable Day-Trips**

### Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenic drive</td>
<td>20</td>
<td>15</td>
</tr>
<tr>
<td>Local artist</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Historical house museum</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>Farmer's market</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>Outlet shopping</td>
<td>9</td>
<td>14</td>
</tr>
<tr>
<td>Other shopping</td>
<td>8</td>
<td>22</td>
</tr>
<tr>
<td>State/national park</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Art museum/exhibit</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Other historical sites</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Zoo</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Unique shopping</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Civil war site</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Winery/vineyard</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Guided tour</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>
Things Seen and Experienced on Pennsylvania Day-Trip (Cont’d)

Base: Marketable Day-Trips

Percent of Total

- Other museums: 2013 = 4, 2012 = 2
- Historic house tour: 2013 = 3, 2012 = 2
- Mine Tour: 2013 = 1, 2012 = 1
- Caves: 2013 = 2, 2012 = 2
- Pennsylvania-made art or craft work: 2013 = 1, 2012 = 1
- Brewery: 2013 = 3, 2012 = 2
- Historical re-enactments: 2013 = 2, 2012 = 2
- Historic village/recreation: 2013 = 1, 2012 = 1
- Revolutionary war site: 2013 = 4, 2012 = 2
- Birdwatching: 2013 = 2, 2012 = 2
- Botanical gardens: 2013 = 2, 2012 = 1
- Aquarium: 2013 = 2, 2012 = 1
- Underground railroad site: 2013 = 1, 2012 = 1

226
Dining/Entertainment

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique local foods</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Local music</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>Up-scale restaurants</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Casino/racetrack</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Other live performance</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Theater/dance/symphony/opera</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Jazz/rock concert</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Dance performance</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Auto show</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Professional theater</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Shows/entertainment</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Sports and Recreation

Base: Marketable Day-Trips

Percent of Total

- Hiking: 13% (2013), 6% (2012)
- Other outdoor sport/activity: 12% (2013), 6% (2012)
- Amusement/waterpark: 11% (2013), 6% (2012)
- Golfing: 8% (2013), 2% (2012)
- Fishing: 7% (2013), 4% (2012)
- Backpacking: 6% (2013), 2% (2012)
- Biking: 6% (2013), 3% (2012)
- Camping: 6% (2013), 3% (2012)
- Professional/college sports event: 4% (2013), 3% (2012)
- Amateur sporting event: 3% (2013), <1% (2012)
- Swam in a lake/river: 3% (2013), 2% (2012)
Sports and Recreation (Cont’d)

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mountain/Off-road biking</td>
<td>3</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Swim in a pool</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Horseback riding</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Canoe/kayaking</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Meditation center</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>River rafting</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Snow skiing/snowboarding</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Indoor fitness/yoga</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Extreme sports</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Powerboating/sailing</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Trip Benefits — Marketable Day-Trips
Benefits From Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Relaxed and relieved stress: 64% (2013), 59% (2012)
- A break from the day-to-day environment: 53% (2013), 54% (2012)
- Enjoyed life with no fixed schedule: 36% (2013), 28% (2012)
- Created lasting memories: 26% (2013), 26% (2012)
- Got to try new things: 17% (2013), 11% (2012)
- Renewed personal connections: 17% (2013), 7% (2012)
- Got to visit a place I've never seen: 16% (2013), 14% (2012)
- Improved family ties: 15% (2013), 15% (2012)
Benefits From Pennsylvania Day-Trip (Cont’d)

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrived home with great stories to share</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Enhanced cultural experiences</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>Enhanced knowledge of history</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Was physically challenged and energized</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Better outlook on life</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Was intellectually challenged and energized</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Gained new skill(s)</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Was pampered</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>