Pennsylvania
Annual Traveler Profile
2014 Travel Year
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Introduction

2014 OVERVIEW

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

• In 2014, Pennsylvania hosted an estimated 190.4 million travelers (as measured in person-trips) from throughout the U.S. – a number that was little changed (+0.3%) from the estimated 189.8 million travelers in 2013.

• The 0.6 million increase in PA’s total visitor volume was derived completely from the overnight segment, specifically the VFR (visiting friends/relatives) component, while the total number of day-trip travelers was unchanged.

• Nationally, total overnight visitor volume grew 3.5%, reaching a new record high of over 1.5 billion travelers.
Research Method

The research for this report was conducted by Longwoods International.

The results consist of:

- Estimates of the volume of overnight travel for the U.S.
- Estimates of the volume of overnight and day-trip travel to Pennsylvania and its tourism regions.
- Characteristics and profile of overnight and day trips to the state and the individual tourism regions.

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

For the 2014 travel year, this produced 302,910 trips for analysis nationally – 206,720 for the overnight segment and 96,190 for day trips.
The *Travel USA®* program identified 7,756 survey respondents who visited Pennsylvania on an overnight trip in 2014 and 5,876 on a day trip.

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

There were 2,300 total responses for the overnight segment and 1,119 for the day-trip segment from this return sample.

Estimates of Pennsylvania’s 2014 overnight and day-trip visitor volume were based on a number of sources, including *Travel USA®*, the customized return-to-sample research, and consultations with Tourism Economics.
EXECUTIVE SUMMARY
Pennsylvania’s proximity to major population centers and its unique mix of major historic, cultural, outdoor, and recreation/entertainment events, attractions, and amenities appeal to a wide range of travelers from throughout the U.S.

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

- VFR travel accounted for nearly half (49%) of the state’s overnight total – or approximately 32 million travelers. This was above the 43% average for U.S. travelers nationwide.

- Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second main reason for travel to and/or within PA in 2014, accounting for 39% of overnight travel, or close to 26 million travelers – below the U.S. average of 44%.

- Business and business-leisure travelers accounted for the remaining 8 million of Pennsylvania’s overnight travelers, or 12% of the state total for overnight travel and just below the 13% U.S. average.
Executive Summary – Day Trip Totals

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

- Marketable trips (i.e., leisure trips that may be influenced by marketing) was the main reason for day-trip travel to and/or within PA in 2014 accounting for 55%, or an estimated 69 million, of day-trip travelers, which was well above the percentage (39%) for the state’s overnight travel segment.

- VFR travel accounted for 36% of the state’s day-trip total, or an estimated 45 million travelers, vs. 49% for the overnight segment.

- Business and business-leisure travelers accounted for the remaining 10.9 million, or 9% of the state’s 125 million day-trip total.
**Executive Summary – Who Visits PA?**

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

- Pennsylvania’s marketable overnight travelers had a median age of 42.7 years, which was slightly above the U.S. median (41.9), but below that of the state’s marketable day-trip travelers (45.2).
- Almost two-thirds of PA’s overnight and day-trip travelers were married or with a partner – essentially equal to the U.S. averages.
- The vast majority of the state’s marketable overnight and day-trip travelers held at least a college degree or had attended college.
- The median household income of the state’s 2014 marketable overnight travelers was $62,750 – down from 2013 and below the $64,620 U.S. median. Close to one-fifth of PA travelers reported household incomes of at least $100,000.
A majority of Pennsylvania’s travelers had children under 18 years of age living at home, but the actual percentage varied greatly depending on the age of the traveler.

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

<table>
<thead>
<tr>
<th>Traveler’s Age</th>
<th>Percent With Children Under 18 Years of Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>56%</td>
</tr>
<tr>
<td>25-34</td>
<td>60%</td>
</tr>
<tr>
<td>35-44</td>
<td>80%</td>
</tr>
<tr>
<td>45-54</td>
<td>58%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>9%</td>
</tr>
</tbody>
</table>
Pennsylvania’s tourism industry has cultivated a very positive image and experience among travelers with a majority choosing to vacation in PA because they had traveled here before and wanted to see more.

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

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

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

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

- Philadelphia and The Countryside remained PA’s top destination region for total (i.e., business, leisure and VFR) overnight and day-trip travel among the state’s 11 tourism regions, followed by Pittsburgh and Its Countryside, Dutch Country Roads, and the Pocono Mountains regions, together accounting for 59% of Pennsylvania’s total overnight person-trips in 2014.

- The Dutch Country Roads and Philadelphia and The Countryside regions remained PA’s leading destinations for marketable overnight leisure trips, followed by the Pocono Mountains and Pittsburgh and Its Countryside.

- With their large population bases and business hubs, Philadelphia and The Countryside and Pittsburgh and Its Countryside regions once again hosted the largest number of business and VFR (visiting friends and relatives) travelers in 2014.
Executive Summary – What Do Travelers Like to Do on Their PA Trip?

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

- Almost 40% of Pennsylvania’s marketable overnight travelers visited a historic site or landmark, while a third went shopping (including outlet and “unique” shopping), 30% enjoyed a cultural activity or attraction, and 15% took a scenic drive.

- There were clear differences in the types of activities depending on the presence or absence of children on the trip. Marketable overnight and day-trip travelers without children along were far more likely to enjoy fine dining experiences, visit a casino, or go to a bar or club than those traveling with children, who were far more likely to visit an amusement park or zoo, or swim, fish, and/or camp.
Executive Summary – When and How Travelers Plan and Book Their PA Trip

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

- Forty percent of Pennsylvania’s marketable overnight travelers planned their PA trip within a month or less of traveling and an additional 22% one to two months before.

- Almost 50% of PA’s marketable overnight travelers used the internet to plan their 2014 PA trip, while 16% relied on their personal experience and 12% received advice from friends/relatives.

- Planning where to stay was by far the most common reason PA’s marketable overnight travelers used the internet in 2014 with 46% using the internet to research lodging options. A third of travelers used the internet to find out about local activities/attractions, 31% for maps/directions, and 25% for info on restaurants.

- In terms of technology, PA’s marketable overnight travelers were far more likely to use a desktop (46%) or laptop (48%) in planning their 2014 PA trip, but turned to their smartphone (60%) and, to a lesser extent, tablet (26%) while on their trip.
Travelers are highly engaged in social media but with clear differences based on age, i.e., younger travelers tend to post their travel experiences while older travelers seek travel advice and read reviews.

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

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

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

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

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

- As in prior years, PA’s marketable overnight and day-trip leisure travelers believed relaxation/stress relief to be the primary benefit of travel in 2014. This was cited by nearly two-thirds of overnight travelers and 56% of day-trippers, with “a break from day-to-day responsibilities” ranking second.

- Creating lasting memories and improving and enriching personal relationships with family and/or friends were also key benefits, as well as having no fixed schedule.

- Visiting places never seen before, arriving home with great stories, and being either physically or intellectually challenged were of somewhat lesser importance for the state’s marketable overnight and day-trip travelers in 2014.
Detailed Findings
Size & Structure of US Overnight Travel Market
## U.S. Overnight Visitor Volume 2008 to 2014

### In millions of trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Change</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>1,426</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>1,311</td>
<td>-115</td>
<td>-8.1%</td>
</tr>
<tr>
<td>2010</td>
<td>1,367</td>
<td>56</td>
<td>+4.3%</td>
</tr>
<tr>
<td>2011</td>
<td>1,413</td>
<td>46</td>
<td>+3.4%</td>
</tr>
<tr>
<td>2012</td>
<td>1,451</td>
<td>38</td>
<td>+2.7%</td>
</tr>
<tr>
<td>2013</td>
<td>1,480</td>
<td>29</td>
<td>+2.0%</td>
</tr>
<tr>
<td>2014</td>
<td>1,532</td>
<td>52</td>
<td>+3.5%</td>
</tr>
</tbody>
</table>

Base: Total Overnight Trips
Size and Structure of the U.S. Domestic Overnight Travel Market

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

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

Base: Overnight Trips

Percent of Total

- Visiting Friends/Relatives (VFR)
  - 2014: 44%
  - 2013: 44%
  - 2012: 44%
  - 2011: 44%

- Marketable
  - 2014: 40%
  - 2013: 42%
  - 2012: 43%
  - 2011: 43%

- Business
  - 2014: 13%
  - 2013: 13%
  - 2012: 14%
  - 2011: 16%

Business = Business + Business-Leisure trips in this slide

Business = Business + Business-Leisure trips in this slide
U.S. Overnight Market Segments

Base: Adult Overnight Trips

- Marketable Leisure: 44%
- Visit Friends/Relatives: 43%
- Business: 10%
- Business-Leisure: 3%
Main Purpose of U.S. Overnight Trips in 2014

- **Marketable Trips 44%**
  - Visiting Friends/Relatives (VFR) 43%
  - Touring 8%
  - Special Event 7%
  - Outdoors 6%
  - City trip 6%
  - Casino 5%
  - Resort 5%
  - Theme Park 4%
  - Cruise 2%
  - Golf Trip 1%
  - Ski/Snowboarding 1%
  - Business Trip 7%
  - Conference/Convention 3%
  - Business-Leisure 3%

Base: Adult Overnight Trips
Size & Structure of Pennsylvania Travel Market
Pennsylvania hosted a record number of travelers in 2014, but the rate of growth remained low, especially compared to the U.S. average.
PA 2014 Overnight & Day-Trip Visitor Volume

Base: Adult Overnight Trips to Pennsylvania

Total Person-Trips = 190.4 Million

- Overnight Trips: 65.4 Million
- Day Trips: 125.0 Million
Pennsylvania Visitor Volume

- Pennsylvania hosted an estimated 190.4 million travelers in total (as measured in person-trips) from throughout the U.S. in 2014.
  
  Of these, 65.4 million (or 34%) were overnight trips.

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

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

- Special events, touring, and outdoors were the top three marketable trip types for Pennsylvania overnight travelers in 2014.

- Visiting friends/relatives (VFR) accounted for 49% of PA’s overnight travel in 2014, up slightly from 2013 and well above the 43% U.S. average.
Pennsylvania hosted an estimated 125 million day-trip travelers to and within Pennsylvania in 2014.

Of these, 55% were marketable trip types (a much higher percentage than the overnight segment).

Key marketable day-trip types included touring, special events, and shopping.
Pennsylvania’s Overnight Trip Market Segments

Base: Adult Overnight Trips to Pennsylvania

- Visit Friends/Relatives: 49%
- Marketable Leisure: 39%
- Business: 9%
- Business-Leisure: 3%
Main Purpose of Stay
2014 Pennsylvania Overnight Trips

Visiting Friends/Relatives (VFR)
- Special Event: 9
- Touring: 8
- Outdoors: 6
- City Trip: 5
- Theme Park: 4
- Casino: 3
- Resort: 2
- Skiing/Snowboarding: 1
- Golf Trip: <1
- Business Trip: 6
- Conference/Convention: 3
- Business-Leisure: 3

Percent of Total

Marketable Trips 39%

Base: Adult Overnight Trips
Pennsylvania Overnight Travel
Special Event Trip Types

Base: Adult Overnight Trips to Pennsylvania

- Professional or College Sport Event: 21%
- Concert/Play: 15%
- Fair/Festival: 13%
- Wedding: 9%
- A Race: 6%
- Holiday (e.g., 4th of July, Thanksgiving, etc.): 3%
- Class or Family Reunion: 2%
- Birthday: 1%
- Anniversary: 1%
- Business Event/Convention: 1%
- School Graduation: 1%
- All Other: 27%

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

2014 Overnight Travel, Main Purpose of Stay
Pennsylvania vs. U.S. Average, Percent of Total Travelers
Travel to visit friends/relatives (VFR) was the primary reason for PA overnight travel in 2014 for every age group except those in the 35-44 age range. This group was far more likely to visit Pennsylvania for purely leisure/vacation purposes than any other age group.
PA & U.S. Marketable Overnight Leisure Segments by Age of Adult Traveler

Base: Adult Overnight Trips to Pennsylvania

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

Marketable Trips as Percent of Total Overnight Leisure Trips
Pennsylvania’s Overnight Market Segments by Presence of Children in Household

Base: Adult Overnight Trips to Pennsylvania

Travelers with children living at home were far more likely to take a PA overnight trip for purely leisure (marketable) purposes than those without children.
2014 Estimated Visitor Volume
Pennsylvania Overnight Trips By Region*

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>15.2</td>
<td>14.7</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>11.3</td>
<td>11.0</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>9.9</td>
<td>10.4</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>9.3</td>
<td>8.6</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>6.1</td>
<td>6.0</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>5.6</td>
<td>5.9</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>4.6</td>
<td>4.8</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>4.2</td>
<td>4.4</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>4.3</td>
<td>4.4</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>3.8</td>
<td>3.7</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>2.9</td>
<td>2.5</td>
</tr>
</tbody>
</table>

*Spent time in region
Note: Total will add to more than State total as a number of travelers visited more than one region on a single trip.
2014 Pennsylvania Day-Trip Market Segments

Base: Adult Day Trips to Pennsylvania

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

---

Marketable Leisure: 55%
Visiting Friends/Relatives: 36%
Business Leisure: 7%
Business-Leisure: 2%
Main Purpose of Stay
2014 Pennsylvania Day Trips

Marketable Trips 55%

- Visiting friends/relatives: 36%
- Touring: 11%
- Special event: 10%
- Shopping: 10%
- Outdoors: 6%
- Casino: 6%
- City trip: 5%
- Theme park: 5%
- Resort: 2%
- Golf trip: 1%
- Skiing/snowboarding: <1%
- Other business trip: 5%
- Conference/convention: 2%
- Business-leisure: 2%

Percent of Total
The graph below illustrates the differences in the purpose of stay between PA’s overnight and day-trip travelers in 2014. As in prior years, overnight travelers were more likely to travel to and/or within PA to visit friends/family, while day-trip travelers were far more likely to visit the state for purely leisure reasons.
Estimated Visitor Volume
Pennsylvania Day-Trips by Region*

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>26.1</td>
<td>26.7</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>17.6</td>
<td>17.9</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>17.8</td>
<td>17.2</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>15.7</td>
<td>16.4</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>11.4</td>
<td>11.3</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>10.8</td>
<td>11.4</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>9.4</td>
<td>10.0</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>8.5</td>
<td>8.6</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>7.4</td>
<td>7.2</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>7.5</td>
<td>7.1</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>6.7</td>
<td>6.3</td>
</tr>
</tbody>
</table>

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

In Millions of Trips

Base: Adult Day Trips
Pennsylvania
2014 Marketable Overnight Trips
Origin Markets for Pennsylvania Overnight Trips
Pennsylvania residents accounted for nearly a third of the state’s Marketable Overnight travel segment, while New York, New Jersey, Ohio, and Maryland together accounted for an additional 45% of PA travelers in 2014.
Main Urban Origin Markets for Pennsylvania’s 2014 Marketable Overnight Travelers

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>In-State DMA's</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia</td>
<td>14%</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>7%</td>
</tr>
<tr>
<td>Harrisburg-Lancaster-Lebanon-York</td>
<td>6%</td>
</tr>
<tr>
<td>Wilkes Barre-Scranton</td>
<td>5%</td>
</tr>
<tr>
<td>Johnstown-Altoona</td>
<td>3%</td>
</tr>
<tr>
<td>Erie</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Out-of-State DMA's</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York, NY</td>
<td>22%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>5%</td>
</tr>
<tr>
<td>Cleveland, OH</td>
<td>3%</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>3%</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>3%</td>
</tr>
</tbody>
</table>
Main Origin States for Pennsylvania’s 2014 Business Overnight Travelers

Base: Business Overnight Trips

- Pennsylvania: 26%
- New York: 12%
- New Jersey: 10%
- Ohio: 5%
- California: 4%
- Maryland: 4%
- Florida: 4%
- Texas: 3%
- Massachusetts: 3%

Percent of PA Total
Main Origin States for Pennsylvania’s 2014 Business-Leisure Overnight Trips

Base: Business-Leisure Overnight Trips

- Pennsylvania: 28%
- New York: 11%
- New Jersey: 7%
- Florida: 6%
- Maryland: 5%
- North Carolina: 5%
- Connecticut: 5%
- California: 4%
- Ohio: 3%
Pennsylvania Tourism Regions Visited by Travelers’ State of Residence
Pennsylvania Tourism Regions Visited by New York Residents

For marketable overnight travelers from New York state, the Pocono Mountains region was once again the most popular PA destination in 2014.
Pennsylvania Tourism Regions Visited by New Jersey Residents

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

- Pocono Mountains: 30%
- Philadelphia & The Countryside: 22%
- Dutch Country Roads: 19%
- Lehigh Valley: 10%
- Upstate Pennsylvania: 6%
- Pennsylvania's Great Lakes Region: 3%
- Pittsburgh & Its Countryside: 3%
- The Alleghenies: 3%
- Pennsylvania Wilds: 2%
- Valleys of the Susquehanna: 1%
- Laurel Highlands: 1%

Base: Marketable Overnight Trips
Pennsylvania Tourism Regions Visited by Ohio Residents

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

- Pittsburgh & Its Countryside: 28%
- Pennsylvania's Great Lakes Region: 20%
- Dutch Country Roads: 8%
- Upstate Pennsylvania: 6%
- Pennsylvania Wilds: 6%
- Laurel Highlands: 6%
- Pocono Mountains: 6%
- The Alleghenies: 5%
- Philadelphia & The Countryside: 5%
- Valleys of the Susquehanna: 2%
- Lehigh Valley: 2%

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

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

- **Dutch Country Roads**: 26%
- **Philadelphia & The Countryside**: 17%
- **Pittsburgh & Its Countryside**: 12%
- **Pocono Mountains**: 8%
- **Upstate Pennsylvania**: 7%
- **Lehigh Valley**: 4%
- **Pennsylvania Wilds**: 4%
- **Valleys of the Susquehanna**: 4%
- **The Alleghenies**: 4%
- **Pennsylvania’s Great Lakes Region**: 3%
- **Laurel Highlands**: 2%
Traveler Profile —
PA Marketable Overnight Trips
Gender

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>50</td>
<td>52</td>
</tr>
<tr>
<td>Female</td>
<td>50</td>
<td>48</td>
</tr>
</tbody>
</table>
Age of Adult Travelers

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 Years</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>25-34 Years</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>35-44 Years</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>45-54 Years</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>55-64 Years</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>65+ Years</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Median Age:
- Pennsylvania: 42.7
- US Average: 42.1
Race

Base: Overnight Marketable Trips

Percent of Total

- White: 85% (Pennsylvania), 81% (US Average)
- African-American: 6% (Pennsylvania), 8% (US Average)
- Other: 9% (Pennsylvania), 11% (US Average)

Base: Overnight Marketable Trips
Hispanic Background

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Response</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>93%</td>
<td>90%</td>
</tr>
<tr>
<td>Yes</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Pennsylvania
US Average
Marital Status

Base: Overnight Marketable Trips

Percent of Total

- Married/With partner: 64% (Pennsylvania), 63% (US Average)
- Never married: 25% (both Pennsylvania and US Average)
- Divorced/Widowed/Separated: 11% (Pennsylvania), 12% (US Average)

Pennsylvania
US Average
Household Size

Base: Overnight Marketable Trips

Percent of Total

1 member: Pennsylvania 16%, US Average 19%
2 members: Pennsylvania 33%, US Average 34%
3 members: Pennsylvania 20%, US Average 19%
4 members: Pennsylvania 17%, US Average 16%
5+ members: Pennsylvania 14%, US Average 13%

Average Household Size: Pennsylvania 3.0, United States 2.9
On average, Pennsylvania travelers were more likely to have young children.

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

- **No Children Under 18 Years of Age**
  - Pennsylvania: 49%
  - US Average: 51%

- **At Least One Child Between 13-17 Years of Age**
  - Pennsylvania: 23%
  - US Average: 23%

- **At Least One Child Between 6-12 Years of Age**
  - Pennsylvania: 26%
  - US Average: 26%

- **At Least One Child Under 6 Years of Age**
  - Pennsylvania: 21%
  - US Average: 19%
Presence of Children in Household by Age of Adult Traveler

Base: Overnight Marketable Trips

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

<table>
<thead>
<tr>
<th>Age Range of Adult Travelers</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>56%</td>
<td>54%</td>
</tr>
<tr>
<td>25-34</td>
<td>60%</td>
<td>66%</td>
</tr>
<tr>
<td>35-44</td>
<td>76%</td>
<td>80%</td>
</tr>
<tr>
<td>45-54</td>
<td>58%</td>
<td>51%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>9%</td>
<td>5%</td>
</tr>
</tbody>
</table>
### Education

**Base: Overnight Marketable Trips**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Percent of Total</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>22%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>College graduate</td>
<td>38%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>Some college</td>
<td>20%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>High school or less</td>
<td>19%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

- **Pennsylvania**
- **US Average**
Employment

Base: Overnight Marketable Trips

Percent of Total

- Employed Full Time/Self-Employed: 49% (Pennsylvania), 50% (US Average)
- Employed Part Time: 11% (Pennsylvania), 10% (US Average)
- Not Employed: 6% (Pennsylvania), 6% (US Average)
- Retired: 17% (Pennsylvania), 17% (US Average)
- Student: 7% (Pennsylvania), 7% (US Average)
- Homemaker: 9% (Pennsylvania), 8% (US Average)
Income

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $30,000</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>$30,000-$49,999</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>$50,000-$74,999</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>$75,000-$99,999</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>$100,000-$149,999</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>$150,000 and over</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Trip Planning & Booking
2014 Marketable Overnight Trips
Main Reason for Choosing Pennsylvania

Base: Overnight Marketable Trips

Percent of Total

- Visited before and wanted to see more: 51% (2014), 47% (2013)
- Live nearby: 16% (2014), 21% (2013)
- Recommendation from friend: 16% (2014), 18% (2013)
- Saw/heard advertisement: 7% (2014), 6% (2013)
- Read an article/Heard a news story: 6% (2014), 6% (2013)
- Read a recommendation on social media: 4% (2014), 2% (2013)

2014

2013
Pennsylvania 2014 Trip Planning Horizon

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

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month or Less</td>
<td>42%</td>
<td>40%</td>
</tr>
<tr>
<td>2 Months</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>3-5 Months</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>6 Months or More</td>
<td>16%</td>
<td>15%</td>
</tr>
</tbody>
</table>
The Internet continues to gain dominance as the main trip planning tool and information source for travelers.
Information Sources Used for Planning the Trip (Cont’d)

Percent of Total

- **Local Visitors Bureau/Chamber of Commerce**: 4% (2014), 5% (2013)
- **State Tourism Office**: 4% (2014), 4% (2013)
- **Magazines**: 3% (2014), 5% (2013)
- **Association/Club**: 3% (2014), 2% (2013)
- **Toll-Free Number**: 2% (2014), 2% (2013)
- **Newspapers**: 2% (2014), 2% (2013)
- **Blogs**: 1% (2014), 2% (2013)

Base: Overnight Marketable Trips
Use of Pennsylvania Tourism Office Trip Planning Tools

Base: Overnight Marketable Trips

Percent of Total

- www.visitPA.com
  - 2014: 25%
  - 2013: 25%

- Pennsylvania Travel Guide
  - 2014: 23%
  - 2013: 24%

- Blog about Pennsylvania
  - 2014: 12%
  - 2013: 12%

- Pennsylvania Facebook page
  - 2014: 11%
  - 2013: 13%

- PURSUITIS magazine
  - 2014: 6%
  - 2013: 7%

- Pennsylvania Twitter page
  - 2014: 4%
  - 2013: 7%
Percent of Total visitPA.com Visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2</td>
<td>28</td>
<td>70</td>
</tr>
<tr>
<td>2013</td>
<td>1</td>
<td>28</td>
<td>71</td>
</tr>
</tbody>
</table>

3-Pt. Scale:  
- Red: Not Very Useful  
- Orange: Somewhat Useful  
- Blue: Very Useful
Pennsylvania Travel Guide Usefulness

Base: Overnight Marketable Trips

Percent of Total Pennsylvania Travel Guide Users

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2</td>
<td>41</td>
<td>57</td>
</tr>
<tr>
<td>2013</td>
<td>35</td>
<td>65</td>
<td></td>
</tr>
</tbody>
</table>

3-Pt. Scale:  
- Red: Not Very Useful  
- Yellow: Somewhat Useful  
- Blue: Very Useful
## Websites Used for Planning Pennsylvania Trip

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of Total 2014</th>
<th>Percent of Total 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel websites</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td><a href="http://www.visitPA.com">www.visitPA.com</a></td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Online booking engines</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Car rental websites</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Airline websites</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: Overnight Marketable Trips
Trip Elements Planned Using Internet

Base: Overnight Marketable Trips

Percent of Total

- Accommodations: 46% (2014), 46% (2013)
- Local Activities/Attractions/Things to See and Do: 33% (2014), 30% (2013)
- Car Route/Locations/Map: 31% (2014), 35% (2013)
- Restaurants: 25% (2014), 24% (2013)
- Flight/Train/Bus/Rental Car: 11% (2014), 9% (2013)
- Packages/Tours/Cruises: 5% (2014), 3% (2013)
Reasons for Visiting [www.visitpa.com](http://www.visitpa.com)

Base: Overnight Marketable Trips

**Percent of Total**

- To learn more about Pennsylvania: 2014 - 30%, 2013 - 28%
- To help me decide which Pennsylvania destination to visit: 2014 - 26%, 2013 - 33%
- To obtain more information after I decided to visit: 2014 - 25%, 2013 - 21%
- To help me decide to visit Pennsylvania: 2014 - 16%, 2013 - 16%
www.visitpa.com Influence on Planning

Base: Overnight Marketable Trips

2014
- No Influence: 10
- Very little Influence: 15
- Some Influence: 50
- Large Influence: 25

2013
- No Influence: 3
- Very little Influence: 23
- Some Influence: 46
- Large Influence: 28

Percent

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

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>No Influence</th>
<th>Very little Influence</th>
<th>Some Influence</th>
<th>Large Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>7</td>
<td>9</td>
<td>60</td>
<td>24</td>
</tr>
<tr>
<td>2013</td>
<td>7</td>
<td>9</td>
<td>51</td>
<td>33</td>
</tr>
</tbody>
</table>

4-Point Scale: No Influence, Very Little Influence, Some Influence, A Large Influence
<table>
<thead>
<tr>
<th>Channel</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet search</td>
<td>74</td>
<td>66</td>
</tr>
<tr>
<td>Magazine or newspaper advertisement</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>Internet advertisement</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Pennsylvania travel guide</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Family/friend(s)/colleague(s)</td>
<td>11</td>
<td>18</td>
</tr>
<tr>
<td>Other advertisement (e.g., Radio, billboard, etc.)</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Travel brochure</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>Social Media (e.g. Facebook, Trip Advisor, etc.)</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Magazine or newspaper article/programs</td>
<td>4</td>
<td>12</td>
</tr>
</tbody>
</table>

Base: Overnight Marketable Trips
Technology Used by Travelers

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Device</th>
<th>Planning the trip</th>
<th>During the trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop computer</td>
<td>48</td>
<td>27</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>46</td>
<td>3</td>
</tr>
<tr>
<td>Smartphone</td>
<td>21</td>
<td>60</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>21</td>
<td>26</td>
</tr>
</tbody>
</table>
Social Media Sites Used by Travelers

Percent of Total

- Facebook: 72%
- Twitter: 23%
- Pinterest: 23%
- Trip Advisor: 20%
- Google +: 17%
- LinkedIn: 17%
- Foursquare: 4%
- Virtual Tourist: 1%
- Triplt: 1%
- Trip Say: 1%
- Xanga: 1%

Base: Overnight Marketable Trips
Planning Considerations Beyond Cost

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Consideration</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>18</td>
<td>16</td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Visit family/friends</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Nearby destination</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>5</td>
<td>4</td>
</tr>
</tbody>
</table>

Percent of Total
Percent of Travelers Booking In Advance

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>77</td>
</tr>
<tr>
<td>2014</td>
<td>76</td>
</tr>
</tbody>
</table>

2013: 77%  
2014: 76%
Booking Cycle

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 Months or More</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>3-5 Months</td>
<td>18</td>
<td>16</td>
</tr>
<tr>
<td>2 Months</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>1 Month or Less</td>
<td>55</td>
<td>54</td>
</tr>
</tbody>
</table>
Use of Vacation Packages and Group Tours

Base: Overnight Marketable Trips

**Percent of Total**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td>18</td>
<td>16</td>
</tr>
</tbody>
</table>
Trip Characteristics of Pennsylvania’s Marketable Overnight Travelers
Distance Traveled to Pennsylvania

Base: Overnight Marketable Trips

**Percent of Total**

- **Over 1,000 Miles**
  - 2014: 4
  - 2013: 2

- **500-1,000 Miles**
  - 2014: 4
  - 2013: 5

- **300-499 Miles**
  - 2014: 9
  - 2013: 9

- **100-299 Miles**
  - 2014: 54
  - 2013: 54

- **50-99 Miles**
  - 2014: 20
  - 2013: 21

- **Under 50 Miles**
  - 2014: 9
  - 2013: 9
Transportation Used to Enter Pennsylvania

Base: Overnight Marketable Trips starting outside of Pennsylvania

Percent of Total

Personal
- Own car: 78% (2014) 84% (2013)
- Rental car: 8% (2014) 8% (2013)
- Truck/Van/RV: 3% (2014) 5% (2013)

Commercial
- Bus: 7% (2014) 6% (2013)
- Plane: 5% (2014) 4% (2013)
- Taxi: 4% (2014) 3% (2013)
- Train: 3% (2014) 3% (2013)
- Shuttle van: 1% (2014) 2% (2013)
Transportation Used Inside Pennsylvania

Base: Overnight Marketable Trips

Percent of Total

Personal
- Own car: 81% (2014), 84% (2013)
- Rental car: 10% (2014), 9% (2013)
- Truck/Van/RV: 4% (2014), 5% (2013)
- Bicycle/Motorcycle: 1% (2014), 1% (2013)
- Motor/sailboat: 1% (2014), 1% (2013)

Commercial
- Bus: 8% (2014), 7% (2013)
- Taxi: 7% (2014), 6% (2013)
- Train: 5% (2014), 4% (2013)
- Shuttle van: 4% (2014), 4% (2013)
- Plane: 3% (2014), 2% (2013)
- Ferry/cruise ship/boat: 1% (2014), 1% (2013)
Total Nights Away

Base: Overnight Marketable Trips

Percent of Total

- 1 Night: 2014 - 30%, 2013 - 32%
- 2 Nights: 2014 - 28%, 2013 - 33%
- 3-6 Nights: 2014 - 26%, 2013 - 28%
- 7+ Nights: 2014 - 8%, 2013 - 9%

Average Number of Nights

- 2014: 3.0
- 2013: 3.1
Length of Stay

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Average Number of Nights</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2.2</td>
<td>2.2</td>
</tr>
<tr>
<td>2013</td>
<td>2.0</td>
<td>2.1</td>
</tr>
</tbody>
</table>

* Those who spent at least one night anywhere in Pennsylvania

Pennsylvania
Other Places

Total = 2.2
Total = 2.1
Accommodations*

* Percent of trip nights spent in each type of accommodation

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/Motel</td>
<td>52</td>
<td>51</td>
</tr>
<tr>
<td>Friends/Relatives House/Cottage/Cabin</td>
<td>13</td>
<td>10</td>
</tr>
<tr>
<td>Own House/Cottage/Cabin</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Other Accommodation</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Rented Campground/Trailer Park</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Time Share Unit</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Country Inn/Lodge</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Wilderness Campsite</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Indoor water park</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
Composition of Travel Party

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Relationship</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>60</td>
<td>58</td>
</tr>
<tr>
<td>Child(ren)</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>Friend(s)</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>Just Myself</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Parent(s)</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Other Relative(s)</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Grandparents</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

97
Trip Experiences — Overnight Marketable Trips
Things Seen and Experienced on PA Trip

Base: Overnight Marketable Trips

Percent of Total

- Scenic drive: 15% (2014) 17% (2013)
- Outlet shopping: 14% (2014) 15% (2013)
- Other shopping: 12% (2014) 11% (2013)
- Art museum/exhibit: 9% (2014) 7% (2013)
- Zoo: 8% (2014) 6% (2013)
- State or national park: 8% (2014) 6% (2013)
- Unique shopping: 8% (2014) 5% (2013)
- Other historic site(s): 7% (2014) 8% (2013)
- Other museums: 7% (2014) 8% (2013)
- Historic house tour: 6% (2014) 5% (2013)
- Local artist or craft/artisan: 6% (2014) 5% (2013)
- Brewery: 5% (2014) 3% (2013)
Things Seen and Experienced on Trip (Cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Revolutionary war site: 2014 - 4, 2013 - 3
- Civil War site: 2014 - 4, 2013 - 6
- Historic re-enactment(s): 2014 - 2, 2013 - 2
- Underground railroad site: 2014 - 1, 2013 - 1
- Botanical garden: 2014 - 1, 2013 - 1
- Coal mine: 2014 - 1, 2013 - 1

2014
2013
Dining/Entertainment

Percent of Total

- Up-scale restaurant: 10 (2014), 7 (2013)
- Casino or racetrack: 9 (2014), 10 (2013)
- Fair or festival: 7 (2014), 7 (2013)
- Classical music or dance: 1 (2014), 1 (2013)

Base: Overnight Marketable Trips

Percent of Total Base: Overnight Marketable Trips
Sports and Recreation

Percent of Total

- Amusement/waterpark: 14% (2014) vs 14% (2013)
- Other outdoor sport/activity: 9% (2014) vs 8% (2013)
- Hiking: 9% (2014) vs 9% (2013)
- Swam in pool: 7% (2014) vs 7% (2013)
- Fishing: 5% (2014) vs 7% (2013)
- Camping: 7% (2014) vs 10% (2013)
- Professional/collegiate...: 5% (2014) vs 6% (2013)
- Swam in lake or river: 4% (2014) vs 6% (2013)
- Amateur sporting event: 3% (2014) vs 3% (2013)
- Golfing: 3% (2014) vs 3% (2013)
- Snow skiing/snowboarding: 3% (2014) vs 3% (2013)
- Extreme/adventure sports: 2% (2014) vs 1% (2013)
Activities by Origin Market of Marketable Overnight Travelers
Main Activities of New York Travelers Visiting PA vs. All Other U.S. Destinations

Pennsylvania was a top destination for NY travelers interested in shopping, historic sites, museums and amusement parks, but less so for those interested in swimming, fine dining or casinos.
Pennsylvania has a slight advantage over other U.S. destinations in attracting NJ travelers interested in shopping, historic sites, museums, theme parks, fairs/festivals, and wineries.
Pennsylvania has a clear advantage over other US destinations in attracting Ohio travelers interested in history and culture, especially for historic sites, museums, and the theater.
Pennsylvania has a clear advantage over other U.S. destinations in attracting MD travelers interested in historic sites, museums, theme parks, art galleries, and many outdoor activities.
Pennsylvania’s outdoor recreational opportunities, i.e., camping, hiking/backpacking, and fishing are a big draw for the state’s resident travelers relative to other destinations.
Comparison of Main Activities of Marketable Overnight Travelers According to Traveler’s Age and Presence of Children on Trip
Travelers with children are far more likely to visit a theme park or participate in outdoor activities than those without children, who are more likely to enjoy fine dining experiences and casinos.
**Main Activities - Travelers With No Children on Trip, By Age of Adult Traveler**

*Base: Overnight Marketable Trips*

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
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<tbody>
<tr>
<td>Shopping</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td>Fine dining</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Landmark/historic site</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Museum</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Casino</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National/state park</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Swimming</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theater</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Participation Rates as Percent of Total for Each Age Category
Older travelers with children on the trip are more likely to visit museums and historic sites, while younger travelers are more likely to take them camping and other outdoor activities.
Regional Attractions Visited
2014 Marketable Overnight Trips
Pennsylvania Regional Map
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Erie</td>
<td>37</td>
</tr>
<tr>
<td>Presque Isle State Park</td>
<td>13</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>10</td>
</tr>
<tr>
<td>Erie Zoo &amp; Botanical Gardens</td>
<td>9</td>
</tr>
<tr>
<td>Lake Erie Speedway</td>
<td>8</td>
</tr>
<tr>
<td>Splash Lagoon/Waldameer Water Parks</td>
<td>8</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>7</td>
</tr>
<tr>
<td>Presque Isle Downs &amp; Casino</td>
<td>7</td>
</tr>
<tr>
<td>Erie Art Museum</td>
<td>6</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>4</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>4</td>
</tr>
<tr>
<td>US Brig Niagara/Erie Maritime Museum</td>
<td>3</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Tom Ridge Environmental Center</td>
<td>1</td>
</tr>
</tbody>
</table>

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

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th><strong>Percent of Total</strong></th>
<th><strong>Attraction</strong></th>
<th><strong>Percent</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grove City Shopping Outlets</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Conneaut Lake</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Erie National Wildlife Refuge</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Pymatuning State Park</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Oil City</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Cook Forest</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Conneaut Lake Park</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Oil Creek State Park</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Oil Creek &amp; Titusville Railroad</td>
<td>2</td>
<td></td>
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<tr>
<td>Golf course</td>
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<td></td>
</tr>
<tr>
<td>Wendell August Forge</td>
<td>&lt;1</td>
<td></td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Pittsburgh</td>
<td>28</td>
</tr>
<tr>
<td>Professional Sports Game (Pittsburgh Steelers/Pirates/Penguins)</td>
<td>13</td>
</tr>
<tr>
<td>Carnegie Museums</td>
<td>10</td>
</tr>
<tr>
<td>Children's Museum of Pittsburgh</td>
<td>8</td>
</tr>
<tr>
<td>Pittsburgh Zoo &amp; PPG Aquarium</td>
<td>8</td>
</tr>
<tr>
<td>Pittsburgh Cultural District</td>
<td>8</td>
</tr>
<tr>
<td>Duquesne Incline</td>
<td>7</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>7</td>
</tr>
<tr>
<td>College Sports Event</td>
<td>6</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

Kennywood Amusement Park 4
Andy Warhol Museum 4
Fort Pitt Museum 4
Cathedral of Learning 3
National Aviary 2
Professional Cultural Performance (Pittsburgh Symphony/Ballet/Opera/Theater) 2
Phipps Conservatory & Gardens 2
Winery/Vineyard 1

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

Base: Overnight Marketable Trips

Percent of Total

- Amish Farms/Countryside: 7%
- Historic House/Museum: 6%
- A Covered Bridge: 6%
- LeMoyne House/Underground Railroad: 4%
- The Meadows Casino: 3%
- Underground Railroad: 3%
- Golf course: 3%
- Moraine State Park: 3%
- Kiski Junction Railroad: 3%
- McConnell's Mill State Park: 2%
- Robena Mine Memorial: 2%

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic Harmony/Harmony Museum</td>
<td>2</td>
</tr>
<tr>
<td>Ryerson Station State Park</td>
<td>2</td>
</tr>
<tr>
<td>Slippery Rock</td>
<td>1</td>
</tr>
<tr>
<td>Bushy Run Battlefield</td>
<td>1</td>
</tr>
<tr>
<td>Meadowcroft Rockshelter and Museum of Rural Life</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Air Heritage Museum</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Crooked Creek State Park/Environmental Learning Center</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Lenape Heights</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Jimmy Stewart Museum</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Yellow Creek State Park</td>
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</tbody>
</table>

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

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seven Springs Mountain Resort</td>
<td>15</td>
</tr>
<tr>
<td>Ohiopyle/Ohiopyle State Park</td>
<td>15</td>
</tr>
<tr>
<td>Fort Necessity</td>
<td>9</td>
</tr>
<tr>
<td>Fallingwater</td>
<td>8</td>
</tr>
<tr>
<td>Flight 93 National Memorial</td>
<td>8</td>
</tr>
<tr>
<td>Other Frank Lloyd Wright Houses</td>
<td>8</td>
</tr>
<tr>
<td>Pittsburgh Steelers Summer Training Camp</td>
<td>8</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>8</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>7</td>
</tr>
<tr>
<td>Great Allegheny Passage Rail Trail</td>
<td>5</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Laurel Highlands Region (cont’d)

Base: Overnight Trips

Percent of Total

- Nemacolin Woodlands Resort: 4%
- Underground Railroad site: 4%
- Fort Ligonier: 4%
- Idlewild & SoakZone: 3%
- Ligonier/Fort Ligonier Days: 1%
- Westmoreland Museum of American Art: 1%
- Golf: 1%
- Mountain Playhouse: <1%
- Bushy Run Battlefield: <1%
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Overnight Trips

Percent of Total

- Little Pine State Park: 13%
- Historic House/Museum: 9%
- Underground Railroad: 7%
- Millionaires' Row (Historic Homes): 4%
- Little League World Series & Related Events: 4%
- Winery/Vineyard: 3%
- Peter J. McGovern Little League Museum: 2%
- Golf course: 1%
- Piper Aviation Museum: 1%

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

Base: Overnight Trips

Percent of Total

- Allegheny National Forest: 13%
- Pine Creek Gorge/Pennsylvania Grand Canyon: 6%
- Black Moshannon State Park: 6%
- Winery/Vineyard: 6%
- Clarion River: 5%
- Quehanna: 5%
- Pennsylvania Lumber Museum: 4%
- Pennsylvania's Elk Herd/Elk State Park: 4%
- Cherry Springs/Dark Sky Preserve: 4%
- Punxsutawney/Groundhog Phil: 3%
- Golf Course: 3%
- Cook Forest State Park: 3%

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

Percent of Total

- Kinzua State Park/Kinzua Bridge/Kinzua Dam: 3
- Historic House/Museum: 3
- Historic Curtin Village/Eagle Ironworks: 3
- Underground Railroad: 2
- Kettle Creek State Park: 2
- Bucktail State Park: 2
- Smethport: 2
- S.B. Elliott State Park: 1
- Zippo/Case Museum: 1

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic Home/Museum</td>
<td>27</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>21</td>
</tr>
<tr>
<td>Knoebels Amusement Park &amp; Resort</td>
<td>17</td>
</tr>
<tr>
<td>Ricketts Glen State Park</td>
<td>9</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>9</td>
</tr>
<tr>
<td>Shikellamy State Park</td>
<td>9</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>9</td>
</tr>
<tr>
<td>Golf Course</td>
<td>5</td>
</tr>
<tr>
<td>Bloomsburg Fair</td>
<td>3</td>
</tr>
<tr>
<td>Joseph Priestley House</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penn State University</td>
<td>31</td>
</tr>
<tr>
<td>Penn State Sports Event</td>
<td>7</td>
</tr>
<tr>
<td>Golf course</td>
<td>7</td>
</tr>
<tr>
<td>Penn State All Sports Museum</td>
<td>6</td>
</tr>
<tr>
<td>Toftrees Golf Resort</td>
<td>5</td>
</tr>
<tr>
<td>Pennsylvania Military Museum</td>
<td>4</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>3</td>
</tr>
<tr>
<td>Bellefonte Museum</td>
<td>3</td>
</tr>
<tr>
<td>Central Pennsylvania Festival of the Arts</td>
<td>3</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Tussey Mountain Ski Resort</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
<tr>
<td>American Philatelic Society</td>
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</tr>
<tr>
<td>Shavers Creek Environmental Center</td>
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</tr>
</tbody>
</table>

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

Base: Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golf course</td>
<td>4</td>
</tr>
<tr>
<td>Raystown Lake</td>
<td>4</td>
</tr>
<tr>
<td>Boyer Candy Company</td>
<td>4</td>
</tr>
<tr>
<td>Allegheny Portage Railroad</td>
<td>3</td>
</tr>
<tr>
<td>National Historic Site</td>
<td>3</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>3</td>
</tr>
<tr>
<td>Johnstown Inclined Plane</td>
<td>3</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>2</td>
</tr>
<tr>
<td>Shawnee State Park</td>
<td>2</td>
</tr>
<tr>
<td>Blue Knob State Park</td>
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</tr>
</tbody>
</table>

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

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altoona Railroad Museum</td>
<td>2</td>
</tr>
<tr>
<td>Horseshoe Curve</td>
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</tr>
<tr>
<td>Johnstown Flood Museum/Memorial</td>
<td>1</td>
</tr>
<tr>
<td>Bedford Springs</td>
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<tr>
<td>Lakemont Park</td>
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</tr>
<tr>
<td>Creation Festival</td>
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<tr>
<td>Underground Railroad</td>
<td>&lt;1</td>
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<tr>
<td>DelGrosso's Amusement Park</td>
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<tr>
<td>Gravity Hill</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Thunder in the Valley</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

*Endless Mountains

Percent of Total

- Covered Bridges: 9
- Eagle's Mere Historic Village: 7
- Loyalsock State Forest: 7
- Historic Home/Museum: 7
- The Downs at Carbondale: 7
- Endless Mountains Nature Center: 7
- Old Mill Village Museum: 6
- Pennsylvania Anthracite Coal Miners Memorial: 6
- Ricketts Glen State Park: 6
- Golf course: 4
- Winery/Vineyard: 2
- Underground Railroad: 2
Pennsylvania Attractions/Events — Upstate PA Region*

Base: Overnight Trips

Percent of Total

1. Mohegan Sun at Pocono Downs - 13%
2. Steamtown National Historic Site - 10%
3. Hickory Run State Park - 8%
4. PA Anthracite Coal Museum - 7%
5. Lackawanna Electric Trolley Museum - 7%
6. Lackawanna Coal Mine Tour - 6%
7. Covered Bridges - 5%
8. Ricketts Glen State Park - 4%
9. The Downs at Hazleton - 4%
10. Houdini Tour & Museum - 3%
11. Winery/Vineyard - 3%
12. Historic Home/Museum - 2%
13. Underground Railroad - 1%
14. Golf course - 1%
15. Pioneer Tunnel Coal Mine - <1%

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
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<tbody>
<tr>
<td>Bushkill Falls</td>
<td>21</td>
</tr>
<tr>
<td>Mount Airy Casino Resort</td>
<td>16</td>
</tr>
<tr>
<td>Delaware Water Gap</td>
<td>15</td>
</tr>
<tr>
<td>The Crossings Premium Outlets</td>
<td>14</td>
</tr>
<tr>
<td>Pocono Raceway</td>
<td>8</td>
</tr>
<tr>
<td>Great Wolf Lodge</td>
<td>7</td>
</tr>
<tr>
<td>Caesar’s Resort</td>
<td>7</td>
</tr>
<tr>
<td>Pocono Indian Museum</td>
<td>6</td>
</tr>
<tr>
<td>Promised Land State Park</td>
<td>6</td>
</tr>
<tr>
<td>Camelback Waterpark</td>
<td>6</td>
</tr>
<tr>
<td>Lake Wallenpaupack</td>
<td>5</td>
</tr>
<tr>
<td>Tobyhanna State Park</td>
<td>5</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Pocono Mountains Region (cont’d)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
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<tbody>
<tr>
<td>Jim Thorpe</td>
<td>5</td>
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<tr>
<td>Historic Home/Museum</td>
<td>4</td>
</tr>
<tr>
<td>Hickory Run State Park &amp; Big Boulder Field</td>
<td>4</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>4</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Upper Delaware Scenic &amp; Recreation River</td>
<td>3</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>3</td>
</tr>
<tr>
<td>Golf course</td>
<td>2</td>
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<tr>
<td>The Downs at East Stroudsburg</td>
<td>1</td>
</tr>
<tr>
<td>Gray Towers</td>
<td>1</td>
</tr>
<tr>
<td>No. 9 Mine &amp; Museum</td>
<td>1</td>
</tr>
</tbody>
</table>
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

Percent of Total

- Gettysburg Battlefield/National Military Park: 11
- Gettysburg National Military Park & Museum: 9
- Gettysburg Diorama: 7
- Outlet Malls at Gettysburg Village: 7
- Historic Home/Museum: 7
- Covered Bridges: 4
- Eisenhower National Historic Site: 4
- Hall of Presidents & First Ladies: 3
- Land of Little Horses: 3
- Golf course: 2
- General Lee's Headquarters: 2
- Underground Railroad: 1
- Winery/Vineyard: 1

*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have a combined net participation rate of 13%.
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

Percent of Total

- Hershey Park: 25%
- The Hershey Museum on Chocolate Avenue: 16%
- Hershey Gardens: 8%
- Outlets at Hershey: 7%
- Hershey Theater: 6%
- Historic Home/Museum: 5%
- Pennsylvania State Capitol: 4%
- Covered Bridges: 4%
- Winery/Vineyard: 2%
- National Civil War Museum: 2%
- Indian Echo Caverns: 1%
- Lake Tobias Wildlife Park: 1%

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

Base: Overnight Marketable Trips

Percent of Total

- Amish Farms/Countryside: 30
- Covered Bridges: 19
- Outlet Mall (Rockvale, Tanger): 16
- Strasburg Railroad/Traintown: 14
- Lancaster Central Market: 12
- Dutch Wonderland Family Amusement Park: 8
- Historic Home/Museum: 8
- Winery/Vineyard: 5
- Railroad Museum of Pennsylvania: 4
- National Toy Train Museum: 4

*Lancaster Amish Farmland
## Pennsylvania Attractions/Events — Dutch Country Roads Region* (cont’d)

**Base: Overnight Marketable Trips**

### Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ephrata Cloister</td>
<td>3</td>
</tr>
<tr>
<td>Christiana Underground Railroad Center at Historic Zercher's Hotel</td>
<td>2</td>
</tr>
<tr>
<td>People's Place Quilt Museum</td>
<td>2</td>
</tr>
<tr>
<td>Historic Lancaster Walking Tour</td>
<td>2</td>
</tr>
<tr>
<td>National Watch &amp; Clock Museum</td>
<td>2</td>
</tr>
<tr>
<td>Landis Valley Museum</td>
<td>1</td>
</tr>
<tr>
<td>Cherry Crest Adventure Farm</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Wheatland (President John Buchanan Home)</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

- Harley-Davidson Factory: 2
- Snyder's of Hanover: 1
- Martin's Potato Chip Factory: 1
- Utz Quality Foods Factory: <1
- Hanover Shoe Farms: <1

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

*Remainder of region

Base: Overnight Marketable Trips

Percent of Total

- Hawk Mountain: 3%
- Covered Bridges: 2%
- Historic Home/Museum: 1%
- Cabela's: 1%
- VF Outlet Village: 1%
- Winery/Vineyard: <1%
- Mount Gretna: <1%
Pennsylvania Attractions/Events — Lehigh Valley Region

Percent of Total

- Covered Bridges: 16%
- Bethlehem Sands Casino Resort: 14%
- Dorney Park & Wildwater Kingdom: 13%
- Crayola Factory: 13%
- Historic Home/Museum: 12%
- The Downs at Lehigh Valley: 10%
- Martin Guitars: 4%
- Winery/Vineyard: 4%
- Museum of Indian Culture: 3%
- Underground Railroad: 3%
- National Museum of Industrial History: 3%
- Bushkill Amusement Park: 2%
- Golf course: 2%
- National Canal Museum: 1%
- Mack Trucks: 1%

Base: Overnight Trips
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*

Base: Overnight Marketable Trips

Percent of Total

- Liberty Bell/Liberty Bell Center: 25%
- Independence Hall/…: 24%
- Philadelphia Museum of Art: 19%
- Reading Terminal Market: 15%
- Historic Home/Museum: 15%
- National Constitution Center: 11%
- Philadelphia Zoo: 9%
- The Franklin (Institute): 8%
- Eastern State Penitentiary…: 8%
- Academy of Natural Sciences: 6%
- US Mint: 5%

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

Base: Overnight Marketable Trips

**Percent of Total**

- Independence Seaport Museum: 5
- African American Museum in Philadelphia: 5
- Pennsylvania Academy of the Fine Arts: 4
- Philadelphia Premium Outlets: 3
- Covered Bridges: 3
- Golf course: 3
- Rodin Museum: 2
- Edgar Allan Poe National Historic Site: 2
- Thaddeus Kosciuszko National Memorial: 2
- Please Touch Museum: 1
- Underground Railroad: <1

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

Base: Overnight Marketable Trips

Percent of Total

Longwood Gardens 3
Herr's Snack Factory Tour 2
Covered Bridges 1
American Helicopter Museum 1
French Creek State Park <1
Brandywine Battlefield Park <1
Winery/Vineyard <1
Brandywine River Museum <1
Harrah's Chester Casino & Racetrack <1
QVC Studio <1

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

Base: Overnight Marketable Trips

Percent of Total

- King of Prussia Mall: 5
- Valley Forge National Historic Park: 4
- Winery/Vineyard: 3
- Sesame Place: 3
- Peddler's Village: 3
- Neshaminy State Park: 2
- Covered Bridges: 2
- Philadelphia Park Casino & Racetrack: 2
- Historic Home/Museum: 2
- Washington Crossing: 1
- Pennsbury Manor: 1
- Prime Outlets: 1
- Delaware Canal State Park: <1
- James A. Michener Art Museum: <1
- Nockamixon State Park: <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*

- Lots of things for adults to see and do: 57 (2014), 55 (2013)
- Having family or friends who live in the region: 52 (2014), 52 (2013)
- Lots of things for children to see and do: 50 (2014), 51 (2013)
- Unique or local food and cuisine: 49 (2014), 51 (2013)
- Within a two-hour drive from home: 48 (2014), 51 (2013)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Pennsylvania’s Great Lakes Region (Cont’d)

Base: Overnight Trips

Percent rating factor as very important*

- A fun place for couples: 50% (2014), 46% (2013)
- Within a two-to-four-hour drive from home: 54% (2014), 46% (2013)
- Lots of historic things to see or experience: 45% (2014), 42% (2013)
- Being at a place I’ve never seen before: 49% (2014), 44% (2013)
- Lots of cultural things to see or experience: 42% (2014), 39% (2013)
- A great rural/agricultural area: 38% (2014), 42% (2013)
- Different or unique local artwork/craftwork: 39% (2014), 35% (2013)
- Great opportunities for nature/eco-travel: 35% (2014), 36% (2013)
- Availability of camping or RV facilities: 36% (2014), 31% (2013)
- Availability of luxury accommodations: 35% (2014), 31% (2013)
- Focus on “green travel”: 32% (2014), 30% (2013)

* 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% (2014), 65% (2013)
- Convenient access by car: 61% (2014), 56% (2013)
- Affordable attractions/events: 57% (2014), 54% (2013)
- Having family or friends who live in the region: 54% (2014), 53% (2013)
- Lots of things for adults to see and do: 50% (2014), 51% (2013)
- A fun city environment: 51% (2014), 49% (2013)
- Availability of mid-range accommodations: 47% (2014), 44% (2013)
- Unique or local food and cuisine: 47% (2014), 44% (2013)
- Lots of cultural things to see or experience: 43% (2014), 41% (2013)
- Being at a place I’ve never seen before: 44% (2014), 39% (2013)
- Lots of historic things to see or experience: 41% (2014), 38% (2013)
- Lots of information about the destination on the Internet: 36% (2014), 38% (2013)

* 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*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great shopping</td>
<td>37</td>
<td>39</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>37</td>
<td>40</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>35</td>
<td>34</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>35</td>
<td>36</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>34</td>
<td>38</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>32</td>
<td>29</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>30</td>
<td>36</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>26</td>
<td>27</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>27</td>
<td>31</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>24</td>
<td>19</td>
</tr>
</tbody>
</table>

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

% Rating Factor As Very Important*

- Feeling safe at the destination: 67% (2014), 79% (2013)
- Having family or friends who live in the region: 58% (2014), 68% (2013)
- Convenient access by car: 55% (2014), 69% (2013)
- Affordable attractions/events: 52% (2014), 68% (2013)
- Lots of things for adults to see and do: 48% (2014), 58% (2013)
- Being at a place I’ve never seen before: 39% (2014), 58% (2013)
- Lots of historic things to see or experience: 38% (2014), 64% (2013)
- A great rural/agricultural area: 37% (2014), 50% (2013)
- A fun city environment: 36% (2014), 57% (2013)
- Within a two-hour drive from home: 36% (2014), 45% (2013)
- Lots of things for children to see and do: 35% (2014), 44% (2013)
- Within a two-to-four-hour drive from home: 35% (2014), 51% (2013)

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

% Rating Factor As Very Important*

- Lots of cultural things to see or experience: 34% (2014), 56% (2013)
- A fun place for couples: 33% (2014), 51% (2013)
- Great shopping: 33% (2014), 56% (2013)
- Availability of mid-range accommodations: 32% (2014), 43% (2013)
- Unique or local food and cuisine: 32% (2014), 54% (2013)
- Availability of economy or budget accommodations: 29% (2014), 44% (2013)
- Lots of information about the destination on the…: 27% (2014), 47% (2013)
- Different or unique local artwork/craftwork: 27% (2014), 47% (2013)
- Availability of luxury accommodations: 25% (2014), 51% (2013)
- Great opportunities for nature/eco-travel: 25% (2014), 50% (2013)
- Focus on “green travel”*: 23% (2014), 46% (2013)
- Availability of camping or RV facilities: 20% (2014), 50% (2013)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of things for adults to see and do: 2014 - 47, 2013 - 61
- Within a two-to-four-hour drive from home: 2014 - 42, 2013 - 41
- Within a two-hour drive from home: 2014 - 37, 2013 - 41
- Lots of historic things to see or experience: 2014 - 33, 2013 - 38

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

*Caution: low sample size
Importance of Factors In Choosing to Visit Pennsylvania Wilds (Cont’d)

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of cultural things to see or experience: 2014-32, 2013-28
- Availability of camping or RV facilities: 2014-32, 2013-32
- Unique or local food and cuisine: 2014-28, 2013-38
- Availability of mid-range accommodations: 2014-26, 2013-30
- Lots of things for children to see and do: 2014-25, 2013-33
- Availability of luxury accommodations: 2014-17, 2013-22
- Focus on “green travel”: 2014-22, 2013-29
- Different or unique local artwork/craftwork: 2014-22, 2013-32

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

*Caution: low sample size
### Importance of Factors In Choosing to Visit Valleys of the Susquehanna Region

**Base: Overnight Trips**

#### % Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>57</td>
<td>60</td>
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<tr>
<td>Affordable attractions/events</td>
<td>45</td>
<td>52</td>
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<tr>
<td>Having family or friends who live in the region</td>
<td>49</td>
<td>61</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>43</td>
<td>61</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>38</td>
<td>49</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>38</td>
<td>49</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
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<td>42</td>
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<tr>
<td>Availability of economy or budget accommodations</td>
<td>35</td>
<td>43</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>Being at a place I've never seen before</td>
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<td>48</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>33</td>
<td>38</td>
</tr>
</tbody>
</table>

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

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

% Rating Factor As Very Important*

- Great shopping: 31% (2014), 38% (2013)
- A great rural/agricultural area: 30% (2014), 38% (2013)
- Within a two-hour drive from home: 30% (2014), 38% (2013)
- Availability of mid-range accommodations: 29% (2014), 40% (2013)
- Great opportunities for nature/eco-travel: 29% (2014), 35% (2013)
- Focus on “green travel”: 29% (2014), 35% (2013)
- Availability of camping or RV facilities: 27% (2014), 30% (2013)
- Lots of information about the destination on the…: 26% (2014), 30% (2013)
- Availability of luxury accommodations: 25% (2014), 25% (2013)
- Within a two-to-four-hour drive from home: 25% (2014), 36% (2013)
- Lots of things for children to see and do: 22% (2014), 33% (2013)
- A fun place for couples: 21% (2014), 34% (2013)

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

*Caution: low sample size
Importance of Factors In Choosing to Visit The Alleghenies Region

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 64% (2014), 69% (2013)
- Having family or friends who live in the region: 50% (2014), 51% (2013)
- Convenient access by car: 48% (2014), 60% (2013)
- Affordable attractions/events: 47% (2014), 56% (2013)
- Lots of things for adults to see and do: 39% (2014), 44% (2013)
- Availability of economy or budget accommodations: 36% (2014), 36% (2013)
- Within a two-hour drive from home: 36% (2014), 35% (2013)
- A fun city environment: 33% (2014), 29% (2013)
- Lots of cultural things to see or experience: 32% (2014), 36% (2013)
- Being at a place I’ve never seen before: 32% (2014), 46% (2013)
- Within a two-to-four-hour drive from home: 31% (2014), 41% (2013)
- Unique or local food and cuisine: 31% (2014), 39% (2013)

* 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*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great rural/agricultural area</td>
<td>30</td>
<td>39</td>
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<tr>
<td>Lots of historic things to see or experience</td>
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<td>35</td>
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<tr>
<td>A fun place for couples</td>
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<td>Great opportunities for nature/eco-travel</td>
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<tr>
<td>Great shopping</td>
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<tr>
<td>Lots of information about the destination on the…</td>
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</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>26</td>
<td>32</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>22</td>
<td>31</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>21</td>
<td>31</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>14</td>
<td>25</td>
</tr>
</tbody>
</table>

* 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: 75% (2014), 71% (2013)
- Convenient access by car: 63% (2014), 70% (2013)
- Having family or friends who live in the region: 60% (2014), 60% (2013)
- Affordable attractions/events: 54% (2014), 60% (2013)
- Availability of mid-range accommodations: 48% (2014), 52% (2013)
- Lots of things for adults to see and do: 45% (2014), 52% (2013)
- A fun place for couples: 40% (2014), 52% (2013)
- Availability of economy or budget accommodations: 40% (2014), 45% (2013)
- Unique or local food and cuisine: 39% (2014), 41% (2013)
- Being at a place I’ve never seen before: 38% (2014), 42% (2013)
- Lots of information about the destination on the Internet: 36% (2014), 37% (2013)
- Lots of historic things to see or experience: 36% (2014), 37% (2013)

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

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>% Rating Factor As Very Important*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-hour drive from home</td>
<td>35 (2014) 36 (2013)</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>35 (2014) 47 (2013)</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>33 (2014) 42 (2013)</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>28 (2014) 31 (2013)</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>28 (2014) 29 (2013)</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>28 (2014) 37 (2013)</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>27 (2014) 30 (2013)</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>18 (2014) 24 (2013)</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 78% (2014) vs. 77% (2013)
- Convenient access by car: 69% (2014) vs. 70% (2013)
- Affordable attractions/events: 62% (2014) vs. 63% (2013)
- Lots of things for adults to see and do: 60% (2014) vs. 60% (2013)
- Within a two-hour drive from home: 49% (2014) vs. 45% (2013)
- Availability of mid-range accommodations: 48% (2014) vs. 48% (2013)
- Unique or local food and cuisine: 44% (2014) vs. 45% (2013)
- Lots of information about the destination on the Internet: 45% (2014) vs. 45% (2013)
- Being at a place I’ve never seen before: 45% (2014) vs. 46% (2013)
- A fun place for couples: 43% (2014) vs. 46% (2013)
- Within a two-to-four-hour drive from home: 43% (2014) vs. 47% (2013)
- Availability of economy or budget accommodations: 41% (2014) vs. 44% (2013)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Having family or friends who live in the region: 48% (2014), 40% (2013)
- Lots of things for children to see and do: 42% (2014), 38% (2013)
- Lots of cultural things to see or experience: 44% (2014), 36% (2013)
- Lots of historic things to see or experience: 43% (2014), 35% (2013)
- Great shopping: 44% (2014), 35% (2013)
- A fun city environment: 38% (2014), 35% (2013)
- Availability of luxury accommodations: 37% (2014), 32% (2013)
- Great opportunities for nature/eco-travel: 37% (2014), 32% (2013)
- A great rural/agricultural area: 38% (2014), 31% (2013)
- Different or unique local artwork/craftwork: 32% (2014), 31% (2013)
- Focus on “green travel”: 29% (2014), 23% (2013)
- Availability of camping or RV facilities: 21% (2014), 21% (2013)

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

161
Importance of Factors In Choosing to Visit Dutch Country Roads

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>70%</td>
<td>71%</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>67%</td>
<td>61%</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>47%</td>
<td>52%</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>49%</td>
<td>45%</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>48%</td>
<td>41%</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: Overnight Marketable Trips

% Rating Factor As Very Important*

- Great shopping: 39% in 2014, 40% in 2013
- A great rural/agricultural area: 38% in 2014, 39% in 2013
- Within a two-hour drive from home: 38% in 2014, 39% in 2013
- Lots of things for children to see and do: 38% in 2014, 38% in 2013
- A fun place for couples: 37% in 2014, 36% in 2013
- Different or unique local artwork/craftwork: 27% in 2014, 34% in 2013
- Availability of luxury accommodations: 23% in 2014, 34% in 2013
- A fun city environment: 23% in 2014, 32% in 2013
- Great opportunities for nature/eco-travel: 24% in 2014, 37% in 2013
- Having family or friends who live in the region: 21% in 2014, 21% in 2013
- Availability of camping or RV facilities: 20% in 2014, 20% in 2013
- Focus on “green travel”: 17% in 2014, 17% in 2013

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 68% (2014), 79% (2013)
- Convenient access by car: 56% (2014), 67% (2013)
- Having family or friends who live in the region: 50% (2014), 58% (2013)
- Affordable attractions/events: 47% (2014), 56% (2013)
- Lots of things for adults to see and do: 44% (2014), 46% (2013)
- Availability of mid-range accommodations: 40% (2014), 39% (2013)
- Within a two-hour drive from home: 40% (2014), 53% (2013)
- Within a two-to-four-hour drive from home: 39% (2014), 47% (2013)
- Lots of historic things to see or experience: 39% (2014), 38% (2013)
- Lots of cultural things to see or experience: 38% (2014), 40% (2013)
- A fun place for couples: 37% (2014), 36% (2013)
- Availability of economy or budget accommodations: 37% (2014), 42% (2013)

* 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*

- Unique or local food and cuisine: 37 (2014), 46 (2013)
- Being at a place I’ve never seen before: 36 (2014), 44 (2013)
- Lots of things for children to see and do: 25 (2014), 32 (2013)
- Different or unique local artwork/craftwork: 31 (2014), 35 (2013)
- Focus on “green travel”: 22 (2014), 26 (2013)
- Availability of camping or RV facilities: 19 (2014), 20 (2013)

Base: Overnight Trips

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

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 72% (2014), 74% (2013)
- Affordable attractions/events: 66% (2014), 69% (2013)
- Lots of things for adults to see and do: 61% (2014), 61% (2013)
- A fun city environment: 61% (2014), 59% (2013)
- Being at a place I’ve never seen before: 57% (2014), 52% (2013)
- Convenient access by car: 56% (2014), 67% (2013)
- Unique or local food and cuisine: 55% (2014), 54% (2013)
- Lots of information about the destination on the Internet: 54% (2014), 46% (2013)
- Lots of historic things to see or experience: 54% (2014), 46% (2013)
- Lots of cultural things to see or experience: 54% (2014), 51% (2013)
- Availability of mid-range accommodations: 53% (2014), 46% (2013)
- Availability of economy or budget accommodations: 45% (2014), 40% (2013)

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

Base: Overnight Marketable Trips

% Rating Factor As Very Important*

- A fun place for couples
- Great shopping
- Availability of luxury accommodations
- Within a two-hour drive from home
- Different or unique local artwork/craftwork
- Within a two-to-four-hour drive from home
- Great opportunities for nature/eco-travel
- Having family or friends who live in the region
- A great rural/agricultural area
- Focus on “green travel”
- Lots of things for children to see and do
- Availability of camping or RV facilities

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

2014
2013

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Product Delivery — Marketable Overnight Trips
Traveler Priorities

- Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- The degree of association between each factor was then measured on whether Pennsylvania is a place “I would really enjoy visiting.”
- To motivate Pennsylvania visitors to return, it is important that the state be perceived as a destination that is exciting, attractive for adult vacation, while at the same time safe and worry-free and family-friendly.
Traveler Priorities

Base: Overnight Trips

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

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

Relative Importance
### Hot Buttons

**Base: Overnight Trips**

<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>Good place for families to visit</td>
</tr>
<tr>
<td>3</td>
<td>A good place for couples to visit</td>
</tr>
<tr>
<td>4</td>
<td>Good for adult vacation/getaway</td>
</tr>
<tr>
<td>5</td>
<td>A place I would feel welcome</td>
</tr>
<tr>
<td>6</td>
<td>Good place to get away and relax</td>
</tr>
<tr>
<td>7</td>
<td>Lots to see and do</td>
</tr>
<tr>
<td>8</td>
<td>Well-known landmarks</td>
</tr>
<tr>
<td>9</td>
<td>Safe place to travel in tourist areas</td>
</tr>
<tr>
<td>10</td>
<td>Must-see destination</td>
</tr>
<tr>
<td>11</td>
<td>Great value for the money</td>
</tr>
<tr>
<td>12</td>
<td>Exciting destination</td>
</tr>
<tr>
<td>13</td>
<td>Beautiful gardens and parks</td>
</tr>
<tr>
<td>14</td>
<td>Excellent State/National Parks</td>
</tr>
<tr>
<td>15</td>
<td>Interesting small towns/villages</td>
</tr>
<tr>
<td>16</td>
<td>Very affordable vacation destination</td>
</tr>
</tbody>
</table>

*A measure of the degree of association between each attribute and whether a destination is a place “I would really enjoy visiting.”*
Image ratings by recent visitors can be viewed as product ratings such that recent visitors are, presumably, rating Pennsylvania based on their personal experience.

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

Base: Overnight Marketable Trips

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percent Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worry Free</td>
<td>67</td>
</tr>
<tr>
<td>Adult Atmosphere</td>
<td>67</td>
</tr>
<tr>
<td>Affordable</td>
<td>67</td>
</tr>
<tr>
<td>Family Destination</td>
<td>65</td>
</tr>
<tr>
<td>Exciting</td>
<td>64</td>
</tr>
<tr>
<td>Climate</td>
<td>62</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>62</td>
</tr>
<tr>
<td>Unique</td>
<td>53</td>
</tr>
<tr>
<td>Entertainment</td>
<td>52</td>
</tr>
<tr>
<td>Luxurious</td>
<td>52</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>50</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Exciting

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Exciting: 64%
- A fun place for a vacation/getaway: 67%
- Exciting destination: 60%
Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 67%
- Good for adult vacation/getaway: 70%
- A good place for couples to visit: 64%
Pennsylvania’s Product Delivery — Worry Free

Percent Who Strongly Agree

- Worry Free: 67%
- Safe place to travel in tourist areas: 71%
- A place I would feel welcome: 69%
- Good place to get away and relax: 66%
- Warm/friendly people: 63%

Base: Overnight Marketable Trips
Pennsylvania’s Product Delivery — Family Destination

Percent Who Strongly Agree

- Family Destination: 65%
- Good place for families to visit: 69%
- A place welcoming for children: 65%
- A fun place for kids: 61%

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Percent Who Strongly Agree</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>62</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>68</td>
</tr>
<tr>
<td>Lots to see and do</td>
<td>67</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>67</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>67</td>
</tr>
<tr>
<td>Well-known landmarks</td>
<td>65</td>
</tr>
<tr>
<td>Great place for walking/strolling about</td>
<td>64</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>64</td>
</tr>
<tr>
<td>Excellent State/National parks</td>
<td>63</td>
</tr>
<tr>
<td>Interesting small towns/villages</td>
<td>63</td>
</tr>
<tr>
<td>Beautiful gardens &amp; parks</td>
<td>62</td>
</tr>
<tr>
<td>Too much to do and see in just one visit</td>
<td>62</td>
</tr>
<tr>
<td>Great place for birding/nature viewing</td>
<td>60</td>
</tr>
<tr>
<td>Great farm stands/farmers’ markets</td>
<td>59</td>
</tr>
<tr>
<td>Interesting festivals/ fairs</td>
<td>58</td>
</tr>
<tr>
<td>Great shopping</td>
<td>58</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>58</td>
</tr>
<tr>
<td>Interesting cities</td>
<td>57</td>
</tr>
<tr>
<td>Authentic &amp; exciting historical re-enactments</td>
<td>57</td>
</tr>
<tr>
<td>Great place for antiquing</td>
<td>52</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Affordable

*Percent Who Strongly Agree*

- Affordable: 67%
- Easy to get to: 70%
- Not too far away for a vacation: 69%
- Very affordable for a getaway weekend: 69%
- Close enough for a weekend getaway: 67%
- Very affordable vacation destination: 64%
- Great value for the money: 64%
- Affordable accommodations: 64%

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

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Unique
  - 53%

- Unique & Interesting customs/traditions
  - 54%

- Lots of unique local cuisine
  - 54%
Pennsylvania’s Product Delivery — Climate

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Climate: 62
- Climate was perfect for what we wanted to do: 62
Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Entertainment: 52%
- Great for theater and the arts: 53%
- Great live music: 51%
Pennsylvania’s Product Delivery — Luxurious

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th></th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxurious</td>
<td>52</td>
</tr>
<tr>
<td>First-class hotels</td>
<td>55</td>
</tr>
<tr>
<td>First-class resorts</td>
<td>50</td>
</tr>
<tr>
<td>Good place to find elegant, sophisticated restaurants</td>
<td>49</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

*Percent Who Strongly Agree*

- Sports and Recreation: 50%
- Great camping: 57%
- Great leisure biking: 53%
- Excellent fishing: 52%
- Good place for skiing/winter sports: 52%
- Excellent hunting: 49%
- Great mountain/off-road bicycling: 48%
- Good place for extreme/adventure sports: 48%
- Fun & challenging golf courses: 43%
Pennsylvania’s Top 20 Image Attributes

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Safe place to travel in tourist areas: 71
- Easy to get to: 70
- Good for adult vacation/getaway: 70
- A place I would feel welcome: 69
- Not too far away for a vacation: 69
- Very affordable for a getaway: 69
- Good place for families to visit: 69
- Truly beautiful scenery: 68
- Lots to see and do: 67
- A fun place for a vacation/getaway: 67
Pennsylvania’s Top 20 Image Attributes (Cont’d)

*Percent Who Strongly Agree*

- Noted for its history: 67%
- Authentic historical sites: 67%
- Close enough for a weekend: 67%
- Good place to get away and relax: 66%
- A place welcoming for children: 65%
- Well-known landmarks: 65%
- Very affordable vacation destination: 64%
- Great value for the money: 64%
- A good place for couples to visit: 64%
- Affordable accommodations: 64%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents

Base: Overnight Marketable Trips

Percent who strongly agree

- Close enough for a weekend getaway
  - PA Residents: 63%
  - Non-Residents: 76%

- Easy to get to
  - PA Residents: 67%
  - Non-Residents: 75%

- A place I would feel welcome
  - PA Residents: 67%
  - Non-Residents: 75%

- Not too far away for a vacation
  - PA Residents: 67%
  - Non-Residents: 74%

- Good for adult vacation/getaway
  - PA Residents: 68%
  - Non-Residents: 74%

- Good place for families to visit
  - PA Residents: 68%
  - Non-Residents: 71%

- Very affordable for a getaway weekend
  - PA Residents: 68%
  - Non-Residents: 71%

- Great place for walking/strolling about
  - PA Residents: 61%
  - Non-Residents: 70%

- Lots to see and do
  - PA Residents: 69%
  - Non-Residents: 66%

- Safe place to travel in tourist areas
  - PA Residents: 69%
  - Non-Residents: 71%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents (Cont’d)

Base: Overnight Marketable Trips

Percent who strongly agree

- Great wilderness areas: 68 (PA Residents), 62 (Non-Residents)
- Truly beautiful scenery: 68 (PA Residents), 67 (Non-Residents)
- Authentic historical sites: 67 (PA Residents), 67 (Non-Residents)
- Well-known landmarks: 66 (PA Residents), 65 (Non-Residents)
- A fun place for a vacation/getaway: 66 (PA Residents), 67 (Non-Residents)
- Great place for birding/nature viewing: 66 (PA Residents), 57 (Non-Residents)
- Good place to get away and relax: 65 (PA Residents), 66 (Non-Residents)
- Interesting small towns/villages: 65 (PA Residents), 62 (Non-Residents)
- Very affordable vacation destination: 65 (PA Residents), 64 (Non-Residents)
- Excellent State/National parks: 64 (PA Residents), 62 (Non-Residents)
Trip Benefits — Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip

Base: Overnight Marketable Trips

Percent of Total

- Relaxed/relieved stress: 64% (2014), 65% (2013)
- Break from the day-to-day: 47% (2014), 52% (2013)
- Created lasting memories: 39% (2014), 39% (2013)
- Enriched relationship with family/friends: 34% (2014), 35% (2013)
- No fixed schedule: 31% (2014), 33% (2013)
- Visited a place I've never seen before: 20% (2014), 19% (2013)
- Arrived home with great stories: 18% (2014), 19% (2013)
- Improved family ties: 17% (2014), 20% (2013)
- Renewed personal connections: 17% (2014), 20% (2013)
Benefits From Pennsylvania Overnight Trip (Cont’d)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Try new things</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>Enhanced cultural experiences</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Enhanced knowledge of history</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Physically challenged and energized</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>Better outlook on life</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>Was pampered</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Intellectually challenged and energized</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Gained new skill(s)</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>
Pennsylvania Day-Trips
Origin Markets — Pennsylvania Day-Trips
State Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania: 47%
- New Jersey: 17%
- New York: 12%
- Ohio: 6%
- Maryland: 5%
- West Virginia: 2%
- Delaware: 2%
- Virginia: 1%
Urban Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

In-State DMAs

Percent of Total

Philadelphia: 20
Pittsburgh: 12
Wilkes Barre-Scranton: 8
Harrisburg-Lancaster-Lebanon-York: 7
Johnstown-Altoona: 4
Erie: 1

Out-of-State DMAs

New York, NY: 19
Cleveland, OH: 4
Washington, DC: 4
Baltimore, MD: 3
Buffalo, NY: 2
Youngstown, OH: 2
Traveler Profile — Marketable Day-Trips
Gender

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Gender</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>45</td>
<td>47</td>
</tr>
<tr>
<td>Female</td>
<td>55</td>
<td>53</td>
</tr>
</tbody>
</table>
Age

Base: Marketable Day-Trips

Percent of Total

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

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>45.6</td>
<td>44.4</td>
</tr>
</tbody>
</table>
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>88</td>
<td>83</td>
</tr>
<tr>
<td>African-American</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>10</td>
</tr>
</tbody>
</table>
Hispanic Background

Base: Marketable Day-Trips

Percent of Total

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

Pennsylvania
US Average
Marital Status

Base: Marketable Day-Trips

Percent of Total

- Married/With partner: 62% (Pennsylvania), 61% (US Average)
- Never married: 24% (Pennsylvania), 24% (US Average)
- Divorced/Widowed/Separated: 14% (Pennsylvania), 14% (US Average)
Household Size

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Members</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>2 members</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>3 members</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>4+ members</td>
<td>28</td>
<td>28</td>
</tr>
</tbody>
</table>

Average Household Size: 2.8

Pennsylvania

United States
Children in Household

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Category</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>No children under 18</td>
<td>54</td>
<td>53</td>
</tr>
<tr>
<td>Any child between 13-17</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Any child between 6-12</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>Any child under 6</td>
<td>18</td>
<td>19</td>
</tr>
</tbody>
</table>

Percent of Total

203
Education

Base: Marketable Day-Trips

Percent of Total

- Post-graduate: 17% Pennsylvania, 17% US Average
- College graduate: 36% Pennsylvania, 37% US Average
- Some college: 23% Pennsylvania, 26% US Average
- High school or less: 23% Pennsylvania, 18% US Average
- Other: 2% Pennsylvania, 1% US Average

Pennsylvania vs US Average

204
Employment

Base: Marketable Day-Trips

Percent of Total

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

Base: Marketable Day-Trips

Percent of Total

- $150,000+: 4 Pennsylvania, 4 US Average
- $100,000-$149,999: 14 Pennsylvania, 13 US Average
- $75,000-$99,999: 14 Pennsylvania, 14 US Average
- $50,000-$74,999: 24 Pennsylvania, 23 US Average
- $30,000-$49,999: 20 Pennsylvania, 21 US Average
- Under $30,000: 23 Pennsylvania, 24 US Average
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: 39% (2014), 41% (2013)
- Live nearby: 35% (2014), 33% (2013)
- Recommendation from friend: 14% (2014), 10% (2013)
- Saw/heard advertisement: 5% (2014), 7% (2013)
- Read an article/Heard a news story: 4% (2014), 8% (2013)
- Read a recommendation on social media: 1% (2014), 1% (2013)
Planning Cycle

Percent of Total

<table>
<thead>
<tr>
<th>Planning Cycle</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same day</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>23</td>
<td>18</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>16</td>
<td>20</td>
</tr>
<tr>
<td>2 weeks</td>
<td>26</td>
<td>19</td>
</tr>
<tr>
<td>3 weeks</td>
<td>10</td>
<td>13</td>
</tr>
<tr>
<td>1 Month or More</td>
<td>21</td>
<td>22</td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Information Sources Used for Planning

Base: Marketable Day-Trips

Percent of Total

- Online/Internet: 2014 - 18%, 2013 - 20%
- Personal experience: 2014 - 15%, 2013 - 24%
- Advice from friends/relatives: 2014 - 13%, 2013 - 13%
- Books: 2014 - 9%, 2013 - 6%
- Social Media: 2014 - 7%, 2013 - 3%
- Travel guide: 2014 - 7%, 2013 - 4%
- Auto club: 2014 - 7%, 2013 - 5%
- Television: 2014 - 6%, 2013 - 4%
- Local visitors bureaus/CoC: 2014 - 5%, 2013 - 3%
- Magazines: 2014 - 5%, 2013 - 3%
Information Sources Used for Planning (Cont’d)

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Source</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td>Newspapers</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Hotel/resort</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Association/club</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>2</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Electronic newsletter</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Blogs</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>State tourism office</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Use of Pennsylvania Trip Planning Tools

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania travel guide: 16% (2013), 16% (2014)
- Blog about Pennsylvania: 7% (2013), 12% (2014)
- Pennsylvania Facebook page: 7% (2013), 7% (2014)
- PURSUITs magazine: 8% (2013), 5% (2014)
- Pennsylvania Twitter page: 4% (2013), 4% (2014)
www.visitpa.com Usefulness

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Useful</th>
<th>Somewhat Useful</th>
<th>Not Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>76</td>
<td>22</td>
<td>2</td>
</tr>
<tr>
<td>2013</td>
<td>84</td>
<td>14</td>
<td></td>
</tr>
</tbody>
</table>

*Caution: low sample size
Travel Guide Usefulness

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Useful</th>
<th>Somewhat Useful</th>
<th>Not Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>64</td>
<td>30</td>
<td>6</td>
</tr>
<tr>
<td>2013</td>
<td>59</td>
<td>38</td>
<td></td>
</tr>
</tbody>
</table>

*Caution: low sample size*
Trip Elements Planned Using Internet

<table>
<thead>
<tr>
<th>Element</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car route/locations/map</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>Local activities/attractions/things to see and do</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Restaurants</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Accommodation</td>
<td>7</td>
<td>10</td>
</tr>
<tr>
<td>Flight/train/bus/rental car</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Packages tours/cruises</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Reasons for Visiting www.visitpa.com

Percent of Total

- To help me decide which Pennsylvania destination to visit: 45% (2014), 55% (2013)
- To help me decide to visit Pennsylvania: 18% (2014), 18% (2013)
- To learn more about Pennsylvania: 17% (2014), 14% (2013)
- To obtain more information after I decided to visit: 20% (2014), 13% (2013)

Base: Marketable Day-Trips
www.visitpa.com Influence on Planning

Base: Marketable Day-Trips

2014

- Large Influence: 22%
- Some Influence: 49%
- Very Little Influence: 24%
- No Influence: 5%

2013

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

Percent
## Influence on Visitation

![Bar chart showing influence on visitation in 2013 and 2014](chart.png)

### 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>2013</td>
<td>29</td>
<td>49</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>2014</td>
<td>26</td>
<td>46</td>
<td>21</td>
<td>6</td>
</tr>
</tbody>
</table>
Technology Used by Day-Trip Travelers

Base: Marketable Day-Trips

Percent of Total

- **Laptop computer**: 36%
  - Planning the trip: 36
  - During the trip: 13
- **Desktop computer**: 34%
  - Planning the trip: 34
  - During the trip: 3
- **Smartphone**: 54%
  - Planning the trip: 16
  - During the trip: 54
- **Tablet computer**: 16%
  - Planning the trip: 16
  - During the trip: 14

Legend:
- Planning the trip
- During the trip
Planning Considerations Beyond Cost

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>35</td>
<td>30</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Near by destination</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Visit Family/friends</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>5</td>
<td>12</td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Percent Who Booked In Advance

Base: Marketable Day-Trips

Percent of Total

2013: 53%
2014: 50%
Booking Cycle

Base: Marketable Day-Trips Booked in Advance

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percent of Total</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 1 month in advance</td>
<td>27</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>3 weeks</td>
<td>8</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>2 weeks</td>
<td>6</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>21</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>24</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Same day</td>
<td>14</td>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>
Use of Vacation Packages and Group Travel

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td>17</td>
<td>19</td>
</tr>
</tbody>
</table>
Marketable Day-Trip Characteristics
Distance Traveled for Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Under 100 Miles: 67% (2014) vs. 58% (2013)
- 100-149 Miles: 21% (2014) vs. 24% (2013)
- 150-199 Miles: 8% (2014) vs. 10% (2013)
- Over 200 Miles: 4% (2014) vs. 8% (2013)
Transportation Used to Enter Pennsylvania

Base: Marketable Day-Trips

Percent of Total

- **Own car**: 81% (2014), 86% (2013)
- **Rental car**: 7% (2014), 4% (2013)
- **Truck/Van/RV**: 5% (2014), 2% (2013)
- **Bus**: 6% (2014), 10% (2013)
- **Train**: 5% (2014), 6% (2013)
- **Taxi**: 3% (2014), 1% (2013)
- **Plane**: 2% (2014), 4% (2013)
- **Shuttle van**: 1% (2014), 1% (2013)
Size of Day-Trip Travel Party

Base: Marketable Day-Trips

2014:
- Adults: 2.3
- Children under 18: 0.7
- Total: 3.0

2013:
- Adults: 2.4
- Children under 18: 0.7
- Total: 3.1

Average No. of People
- Adults
- Children under 18
Composition of Day-Trip Travel Party

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Relation</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse/Partner</td>
<td>58</td>
<td>62</td>
</tr>
<tr>
<td>Child(ren)</td>
<td>30</td>
<td>28</td>
</tr>
<tr>
<td>Friend(s)</td>
<td>20</td>
<td>17</td>
</tr>
<tr>
<td>Just Myself</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Other Relative(s)</td>
<td>10</td>
<td>13</td>
</tr>
<tr>
<td>Parent(s)</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Grandparents</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
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>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other shopping</td>
<td>15</td>
<td>8</td>
</tr>
<tr>
<td>Outlet shopping</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Scenic drive</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>Farmer's market</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>Historical house museum</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>Unique shopping</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Zoo</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Art museum/exhibit</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>State/national park</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Other museums</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Other historical sites</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Civil war site</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Local artist</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Pennsylvania-made art or craft work</td>
<td>11</td>
<td>2</td>
</tr>
</tbody>
</table>

230
Things Seen and Experienced on Pennsylvania Day-Trip (Cont’d)

Base: Marketable Day-Trips

Percent of Total

- Revolutionary war site: 3 (2014), 2 (2013)
- Historical re-enactments: 2 (2014)
- Historic village/recreation: 2 (2013)
- Brewery: 2 (2013)
- Botanical gardens: 1 (2013)
- Aquarium: 1 (2013)
- Underground railroad site: 2 (2013)
- Birdwatching: 2 (2013)
## Dining/Entertainment

<table>
<thead>
<tr>
<th>Activity</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique local foods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Casino/racetrack</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Up-scale restaurants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other live performance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nightlife</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theater/dance/symphony/opera</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shows/entertainment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional theater</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jazz/rock concert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local music</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dance performance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auto show</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Sports and Recreation

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amusement/waterpark</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>Hiking</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>Other outdoor sport/activity</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>Swam in a pool</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Professional/college sports event</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Fishing</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Golfing</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>Camping</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Amateur sporting event</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Biking</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Beach at lake or river</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Jogging/running</td>
<td>&lt;1</td>
<td></td>
</tr>
<tr>
<td>Swam in a lake/river</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Canoe/kayaking</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
Trip Benefits — Marketable Day-Trips
Benefits From Pennsylvania Day-Trip

- Relaxed and relieved stress: 56% (2014) vs. 64% (2013)
- A break from the day-to-day environment: 53% (2014) vs. 53% (2013)
- Enjoyed life with no fixed schedule: 29% (2014) vs. 28% (2013)
- Created lasting memories: 26% (2014) vs. 26% (2013)
- Got to visit a place I've never seen: 19% (2014) vs. 16% (2013)
- Arrived home with great stories to share: 16% (2014) vs. 16% (2013)
- Got to try new things: 15% (2014) vs. 17% (2013)
- Improved family ties: 13% (2014) vs. 15% (2013)

Base: Marketable Day-Trips
### Benefits From Pennsylvania Day-Trip (Cont’d)

**Base: Marketable Day-Trips**

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced cultural experiences</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Renewed personal connections</td>
<td>10</td>
<td>17</td>
</tr>
<tr>
<td>Enhanced knowledge of history</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Better outlook on life</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Was physically challenged and energized</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Was intellectually challenged and energized</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Was pampered</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Gained new skill(s)</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>

Percent of Total