Pennsylvania
Annual Travel Profile
2015 Travel Year
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Overnight Marketable Trips (cont’d)

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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 2015, Pennsylvania hosted an estimated 193.3 million travelers (as measured in person-trips) from throughout the U.S. – a 1.5% increase from 2014.

The 2.9 million increase in PA’s total visitor volume was largely derived from the day-trip segment, which was responsible for almost 80% of the increase in the state’s person-trips between 2014 and 2015.

Nationally, total overnight visitor volume grew 2.4%, reaching a new record high of nearly 1.6 billion travelers.
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 2015 travel year, this produced 337,160 trips for analysis nationally – 237,550 for the overnight segment and 99,610 for day trips.
• The *Travel USA®* program identified 8,822 survey respondents who visited Pennsylvania on an overnight trip in 2015 and 6,456 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 2,280 total responses for the overnight segment and 1,260 for the day-trip segment from this return sample.

• Estimates of Pennsylvania’s 2015 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 continues to attract a wide range of travelers from throughout the U.S.

- Pennsylvania hosted an estimated 193.3 million travelers in 2015, a 1.6% increase from 2014 and well above the 0.3% rate of increase in the previous two years.
- Roughly a third of travelers (66.0 million) stayed overnight during their PA trip with a 0.8% rate of increase that was just below the (0.9%) growth rate in 2014. This was well below the 2.4% growth rate in U.S. overnight travel.
- Pennsylvania’s growth rate for overnight travel has underperformed the U.S. average for the past several years, growing at half the rate (10%) of the U.S. average (20%) between 2009 and 2015.
- An estimated 127.3 million day-trips were taken to and/or within Pennsylvania in 2015 – a 1.8% increase from 2014.
People visit Pennsylvania for a variety of reasons, but for those who stayed overnight, visiting friends and relatives (VFR) remained the most popular reason in 2015.

- VFR travel accounted for slightly less than half (47%) of the state’s overnight total – or an estimated 31 million travelers. While down from 2014, it remained well above the 43% U.S. average.

- 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 2015, accounting for 40% of overnight travel, or an estimated 26.4 million travelers and compared to the 43% average for the U.S. in total.

- Business and business-leisure travelers accounted for the remaining 8 million Pennsylvania overnight travelers in 2015, or 13% of the state total and essentially equal to the U.S. average.
As in prior years, Pennsylvania’s Day-Trip Travelers were far more likely to be traveling for purely leisure purposes than the state’s overnight segment.

- An estimated 127.3 million day-trips were taken to and/or within Pennsylvania in 2015.
- 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 accounting for 55%, or an estimated 70 million day-trip travelers in 2015, which was well above the percentage (40%) for the state’s overnight travel segment.
- VFR travel accounted for 36% of the state’s day-trip total, or an estimated 46 million travelers, vs. 47% for the overnight segment in 2015.
- Business and business-leisure travelers accounted for the remaining 11.5 million, or 9% of the state’s 127.3 million day-trip total.
PA travelers in the marketable overnight segment in 2015 were typically middle-aged, educated, married, and roughly half had children under age 18 living at home.

- Pennsylvania’s marketable overnight travelers had a median age of 44.9 years – the same as that of the state’s marketable day-trip travelers, but slightly above the U.S. median (44.2).
- Almost two-thirds of PA’s overnight and day-trip travelers were married or with a partner – essentially equal to the U.S. average.
- 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 2015 marketable overnight travelers was $60,810 – down from 2013 and 2014 and below the $63,200 U.S. median. Twenty percent of PA travelers reported household incomes of at least $100,000.
Executive Summary –
Travelers with Children

Approximately half of Pennsylvania’s marketable overnight 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>55%</td>
</tr>
<tr>
<td>25-34</td>
<td>62%</td>
</tr>
<tr>
<td>35-44</td>
<td>79%</td>
</tr>
<tr>
<td>45-54</td>
<td>64%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>6%</td>
</tr>
</tbody>
</table>
Pennsylvania’s tourism industry has cultivated a very positive image and experience among travelers with a majority of marketable overnight travelers choosing to spend their leisure time in PA because they had traveled here before and wanted to see more.

- The primary reason marketable overnight visitors visited Pennsylvania in 2015 was because they had visited before and wanted to see more (47%).
- Proximity was also a factor in deciding where to travel with an additional 19% primarily choosing Pennsylvania because they lived nearby.
- Recommendations from friends/relatives were responsible for an additional 19% of the state’s marketable overnight visitors in 2015.
- While still small, recommendations from social media sites are becoming an increasingly important factor in people’s decisions of where to travel, influencing 4.5% of PA’s marketable overnight travelers in 2015 – up from 1.7% in 2013.
Pennsylvania is largely a “drive-to” destination and, as in prior years, the majority of travelers were PA residents or from neighboring states.

- The proportion of Pennsylvania residents who traveled in-state for marketable overnight travel purposes (28%) in 2015 was down 5 percentage points from 2014, with Marketable Day-Trippers down 3 percentage points to 44%.
- As in 2014, New York, New Jersey, Ohio, and Maryland together accounted for nearly 40% of the state’s Marketable Overnight travelers in 2015.
- Pennsylvania and these four states accounted for 85% of the state’s Marketable Day-Trip travelers in 2015, down from almost 90% in 2014.
- Pennsylvania’s overnight business travelers came from a wider geographic area than the state’s leisure travelers, with Pennsylvania residents accounting for 24% of the segment’s total and Maryland, New York, New Jersey, and Ohio together accounting for another 24% in 2015.
Executive Summary – Where Do Travelers Like to Go In Pennsylvania?

The major urban centers of Philadelphia and Pittsburgh were the leading destinations for both overnight and day-trip travelers in 2015.

- As in prior years, 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 nearly 60% of Pennsylvania’s total overnight person-trips in 2015.

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

- With their large population bases and as economically diverse business hubs, the Philadelphia and The Countryside and Pittsburgh and Its Countryside regions once again hosted the largest number of VFR (visiting friends and relatives) and business travelers in 2015.
Pennsylvania’s vacation travelers enjoyed a wide range of activities in 2015, with shopping, historic sites, scenic drives, and cultural activities and attractions remaining among the most popular.

- A third of Pennsylvania’s marketable overnight travelers in 2015 went shopping (including outlet and “unique” shopping), while almost 25% visited a historic site or landmark, over 20% enjoyed a cultural activity or attraction, and 16% took a scenic drive.

- As in previous years, 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 Their PA Trip

As in prior years, the trip planning cycle continues to be short and the internet remains the top planning tool.

- Forty-two percent of Pennsylvania’s overnight leisure travelers planned their PA trip within a month or less of traveling and an additional 19% one to two months before hitting the road.
- Almost 45% of overnight leisure travelers used the internet to plan their 2015 PA trip, while 14% received advice from friends/relatives and an equal percentage relied on their own personal experience.
- Planning where to stay was by far the main reason PA’s overnight leisure travelers used the internet in 2015 with 46% using the internet to research lodging options. About a third of travelers used the internet to find out about local activities/attractions, 30% for maps/directions, and 27% for info on restaurants.
- In terms of technology, PA’s marketable overnight travelers were far more likely to use a desktop (45%) or laptop (48%) to plan their 2015 PA trip, but turned to their smartphone (67%) and, to a lesser extent, tablet (28%) while on their trip.
Executive Summary – Travelers and Social Media Use

Travelers are highly engaged in social media but with clear differences based on age, i.e., younger travelers tend to post pictures and their travel experiences while older travelers seek travel advice and read reviews.

- More than three-quarters of PA’s marketable overnight leisure travelers used social media in some capacity in 2015 – 5 percentage points below the U.S. average.
- As in prior years, travelers in the younger age groups were far more likely to “tweet” and use other social media before, during, and after their trips than older travelers, i.e., 87% of travelers below 45 years of age vs. 62% of those aged 65 or older. Nevertheless, social media use by travelers age 65+ continues to grow, and essentially doubled since 2012.
- Travelers in all age groups used their smartphone while on the road to decide where to stay, eat, and/or go, but usage was highest by far for those in the 35-44 age group, i.e., those most likely to be traveling with children.
- PA’s overnight leisure travelers below age 45 used social media to post their travel photos/videos, view those of others, and find deals, while older travelers were more likely to use social media to read and post online travel reviews.
Short getaways with family or close friends and stays at hotels/motels were among the most common features of trips taken by Pennsylvania’s marketable overnight travelers in 2015.

- 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.
- While shorter stays continued to be the norm for PA’s marketable overnight travelers in 2015 with 54% spending just one or two nights on their PA trip, there was a 5 percentage point increase in the share of travelers (33%) spending 3-6 nights.
- Over two-thirds of the state’s travelers chose to stay in hotels or motels, with an additional 16% staying at their second home or in housing owned by friends or relatives.
- Almost two-thirds of PA’s marketable overnight leisure visitors traveled with a spouse/partner in 2015 and 30% traveled with children – compared to 35% in 2013.
Executive Summary – What Travelers Look For in a Destination

Travelers have certain priorities and expectations when deciding where to go on vacation or for a weekend getaway. There was a shift from 2014 in the priority rankings of U.S. overnight leisure travelers with “adult atmosphere” replacing “worry-free” as travelers’ top priority in 2015.

- In addition to adult atmosphere, the top travel priorities of U.S. overnight leisure travelers in 2015 were: exciting, worry-free, climate, family friendly, sightseeing, and affordable.
- As in prior years, Pennsylvania scored well on each of the top priorities, with two-thirds to nearly three-quarters of the state’s overnight leisure travelers agreeing that their 2015 Pennsylvania trip experience largely met each of these top priorities.
- In addition to the list of travel priorities, there are certain images associated with a destination. Pennsylvania was perceived by overnight leisure travelers in 2015 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 and historic, 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 continues to show 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 2015. This was cited by nearly over 60% 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 2015.
Detailed Findings
Size & Structure of US Overnight Travel Market
Size and Structure of the U.S. Domestic Overnight Travel Market

**U.S. overnight visitor volume continued its steady rate of increase in 2015, reaching a record high 1.57 billion travelers.**

- Overnight travel by U.S. residents rose 2.4% to 1.57 billion in 2015, or about a percentage point below the 3.5% increase seen in 2014.
- Of the nearly 1.6 billion overnight trips taken by U.S. travelers in 2015, 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 – and the same percentage as in 2013 and 2014.
- As in prior years, an additional 10% of trips by U.S. travelers 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, resort trips, and casino trips.
U.S. Overnight Visitor Volume 2008 to 2015

In millions of trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>1,426</td>
<td>+2.7%</td>
</tr>
<tr>
<td>2009</td>
<td>1,311</td>
<td>+3.4%</td>
</tr>
<tr>
<td>2010</td>
<td>1,367</td>
<td>+4.3%</td>
</tr>
<tr>
<td>2011</td>
<td>1,413</td>
<td>+2.7%</td>
</tr>
<tr>
<td>2012</td>
<td>1,451</td>
<td>+2.0%</td>
</tr>
<tr>
<td>2013</td>
<td>1,480</td>
<td>+3.5%</td>
</tr>
<tr>
<td>2014</td>
<td>1,532</td>
<td>+2.4%</td>
</tr>
<tr>
<td>2015</td>
<td>1,568</td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Overnight Trips
Structure of U.S. Overnight Travel 2011 - 2015

Base: Overnight Trips

Percent of Total

Visiting Friends/Relatives
- 2015: 44%
- 2014: 43%
- 2013: 44%
- 2012: 44%
- 2011: 44%

Marketable
- 2015: 43%
- 2014: 44%
- 2013: 43%
- 2012: 42%
- 2011: 43%

Business
- 2015: 13%
- 2014: 13%
- 2013: 13%
- 2012: 14%
- 2011: 12%

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

Base: Adult Overnight Trips

- Marketable Leisure: 43%
- Visits to Friends/Relatives: 44%
- Business: 10%
- Business-Leisure: 3%
Main Purpose of U.S. Overnight Trips in 2015

Marketable Trips 43%

- Visiting friends/relatives 44%
- Touring 8%
- Special event 7%
- Outdoors 6%
- City trip 5%
- Resort 5%
- Casino 4%
- Theme park 4%
- Cruise 2%
- Golf Trip 0.7%
- Ski/Snowboarding 0.7%
- Other business trip 6%
- Conference/Convention 4%
- Business-Leisure 3%

Base: Adult Overnight Trips
Size & Structure of Pennsylvania Travel Market
Pennsylvania hosted an estimated 193.3 million travelers in total (as measured in person-trips) from throughout the U.S. in 2015.

Of these, an estimated 66.0 million (or 34%) were overnight trips – the same percentage as in 2014.

Marketable trip types are trips that can be influenced by marketing, i.e., leisure trips excluding visits to friends/relatives (VFR). Of the estimated 66.0 million overnight trips in Pennsylvania, 41% could be considered marketable trips – a 2 percentage point increase from 2014 and just two percentage points below the U.S. average.

Special events, touring, and outdoors remained the top three marketable trip types for Pennsylvania overnight travelers in 2015.

Visiting friends/relatives (VFR) accounted for 47% of PA’s overnight travel in 2015, down from 2014 but remaining above the 44% U.S. average.
Pennsylvania hosted a record number of travelers in 2015 but, despite an acceleration, the rate of growth remained below the U.S. average.
Total Trips to Pennsylvania in 2015

Total Person-Trips = 193.3 Million

Day Trips
127.3 Million

Overnight Trips
66.0 Million

34%

66%
Pennsylvania hosted a record number of overnight travelers in 2015, but the rate of growth was about a third that of the U.S. average.
Pennsylvania 2015 Overnight Market Segments

Base: Adult Overnight Trips to Pennsylvania

- Marketable Leisure: 40%
- Visits to Friends/Relatives: 47%
- Business: 10%
- Business-Leisure: 3%
Pennsylvania Regions Visited on Overnight Trips*

- Upstate PA: 5.4 (2015) / 5.6 (2014)
- Laurel Highlands: 3.0 (2015) / 2.9 (2014)

*Spent time in region. Figures reflect both business and leisure travelers, including those visiting friends and family. Total exceeds state total as a number of travelers visited more than one region.
Main Purpose of Overnight Trips to Pennsylvania in 2015

Visiting Friends/Relatives: 47%
- Special Event: 10%
- Touring: 9%
- Outdoors: 6%
- City Trip: 5%
- Theme Park: 4%
- Casino: 3%
- Resort: 2%
- Golf Trip: 0.8%
- Skiing/Snowboarding: 0.5%
- Other Business Trip: 6%
- Conference/Convention: 3%
- Business-leisure: 3%
2015 Special Event Trip Pennsylvania Overnight Travelers

Base: Adult Overnight Trips to Pennsylvania

- Professional or College Sports Event: 21%
- Fair or Festival: 12%
- Concert/Play: 12%
- Wedding: 10%
- A Race: 7%
- Birthday: 5%
- School Graduation: 4%
- Anniversary: 3%
- Holiday (e.g., 4th of July, Thanksgiving, etc.): 3%
- Class or Family Reunion: 2%
- Other: 26%
### 2015 Pennsylvania Special Event Trip

**Overnight vs. Day-Trip Travelers**

*Base: Adult Overnight Trips to Pennsylvania*

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Overnight</th>
<th>Day-Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional or College Sports Event</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Fair or Festival</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Concert/Play</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Wedding</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>A Race</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Birthday</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>School Graduation</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Anniversary</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Holiday (e.g., 4th of July, Thanksgiving, etc.)</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Class or Family Reunion</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Funeral</td>
<td>1.4%</td>
<td></td>
</tr>
<tr>
<td>Business Event/Convention</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>
Comparison of Pennsylvania and U.S. Overnight Market Segments, 2015

As in prior years, travelers were more likely to travel to and within Pennsylvania to visit friends and family than travelers nationwide.

2015 Overnight Travel, Main Purpose of Stay
Pennsylvania vs. U.S. Average, Percent of Total Travelers

- **VFR**
  - U.S. Average: 44%
  - Pennsylvania: 47%

- **Marketable**
  - U.S. Average: 43%
  - Pennsylvania: 40%

- **Business**
  - U.S. Average: 10%
  - Pennsylvania: 10%

- **Business-Leisure**
  - U.S. Average: 3%
  - Pennsylvania: 3%
Pennsylvania’s Leisure Overnight Market
Segments by Age of Adult Traveler

Travelers in the 35-44 age range were far more likely to visit Pennsylvania for purely leisure/vacation purposes in 2015 than any other age group.

<table>
<thead>
<tr>
<th>Age of Adult Traveler</th>
<th>Marketable</th>
<th>Visiting Friends/Relatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>45%</td>
<td>56%</td>
</tr>
<tr>
<td>25-34</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>35-44</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>45-54</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>55-64</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>65 or older</td>
<td>39%</td>
<td>61%</td>
</tr>
</tbody>
</table>
Travelers were less likely to visit Pennsylvania for purely leisure (marketable) reasons compared to the U.S. average in 2015, especially those in the older age ranges.
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.
Pennsylvania hosted a record number of travelers in 2015. The number of day-trip travelers rose 13% from 2009-2013, slightly outpacing the 10% increase of the overnight segment.

Pennsylvania Day-Trip Visitor Volume 2009 to 2015

in millions of person-trips

2009: 112.9 (+3.9%)
2010: 117.3 (+0.2%)
2011: 117.5 (+5.7%)
2012: 124.2 (+0.6%)
2013: 125.0 (0%)
2014: 125.0 (+1.8%)
2015: 127.3
Pennsylvania Regions Visited on Day-Trips*

<table>
<thead>
<tr>
<th>Region</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>27.3</td>
<td>26.7</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>18.9</td>
<td>17.9</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>18.1</td>
<td>17.2</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>16.9</td>
<td>16.4</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>11.5</td>
<td>11.3</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>11.4</td>
<td>11.4</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>10.4</td>
<td>10.0</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>8.6</td>
<td>8.6</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>7.6</td>
<td>7.1</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>7.4</td>
<td>7.2</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>6.4</td>
<td>6.3</td>
</tr>
</tbody>
</table>

*Spent time in region

Total exceeds State total as a number of travelers visited more than one region.
Pennsylvania 2015 Day-Trip Market Segments

Base: Adult Day-Trips to Pennsylvania

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

45
Pennsylvania 2015 Visitor Volume
Day-Trip Travelers

- Pennsylvania hosted an estimated 127.4 million day-trip travelers in 2015.
- Of these, 55% were marketable trip types (a much higher percentage than the overnight segment and the same percentage as in 2014).
- As in previous years, the key marketable day-trip types were touring, special events, and shopping.
Main Purpose of Pennsylvania 2015 Day-Trips

Base: Day-Trips

Marketable Trips

- Visiting friends/relatives: 36%
- Touring: 12%
- Special event: 10%
- Shopping: 10%
- Outdoors: 6%
- City trip: 5%
- Casino: 5%
- Theme park: 4%
- Resort: 2%
- Golf trip: 1%
- Skiing/snowboarding: <1%
- Other business trip: 5%
- Conference/convention: 2%
- Business-leisure: 2%

Percent of Total
2015 Special Event Trip Pennsylvania Day-Trip Travelers

Base: Adult Day-Trips to Pennsylvania

- Holiday (e.g., 4th of July, Thanksgiving, etc.): 19%
- Fair or Festival: 12%
- Professional or College Sports Event: 12%
- Birthday: 11%
- Class or Family Reunion: 11%
- Concert/Play: 7%
- Business Event/Convention: 7%
- Wedding: 6%
- Funeral: 6%
- Anniversary: 4%
- A Race: 3%
- School Graduation: 2%
- Other: 22%
The graph below illustrates the differences in the purpose of stay between PA’s overnight and day-trip travelers in 2015. 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.
Pennsylvania’s Marketable Overnight Travelers
Main Origin Markets for Pennsylvania’s Overnight Travelers
Main Origin States for Pennsylvania’s Marketable Overnight Travelers

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>State</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>New York</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Ohio</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Maryland</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Virginia</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Florida</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>California</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Main Urban Origin Markets for Pennsylvania’s Marketable Overnight Travelers

Base: Overnight Marketable Trips

In-State DMA’s
- Philadelphia: 11%
- Pittsburgh: 7%
- Wilkes Barre-Scranton: 5%
- Harrisburg-Lancaster-Lebanon-York: 4%
- Johnstown-Altoona: 3%
- Erie: 1%

Out-of-State DMA’s
- New York, NY: 21%
- Washington, DC: 7%
- Cleveland, OH: 4%
- Baltimore, MD: 2%
- Boston, MA: 2%
Main Origin States for Pennsylvania’s 2015 Business Overnight Travelers

Base: Overnight Business Trips

- Pennsylvania: 25%
- New York: 10%
- Massachusetts: 6%
- New Jersey: 5%
- California: 5%
- Virginia: 5%
- Florida: 5%
- Ohio: 5%
- Illinois: 4%
- Connecticut: 3%
- Maryland: 3%
- Texas: 3%
- Colorado: 2%
Main Origin States for Pennsylvania’s Overnight Business-Leisure Trips

Base: Overnight Business-Leisure Trips

<table>
<thead>
<tr>
<th>State</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>21%</td>
</tr>
<tr>
<td>New York</td>
<td>14%</td>
</tr>
<tr>
<td>Virginia</td>
<td>6%</td>
</tr>
<tr>
<td>Ohio</td>
<td>6%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>5%</td>
</tr>
<tr>
<td>Florida</td>
<td>5%</td>
</tr>
<tr>
<td>Maryland</td>
<td>4%</td>
</tr>
<tr>
<td>California</td>
<td>4%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>3%</td>
</tr>
<tr>
<td>Indiana</td>
<td>2%</td>
</tr>
<tr>
<td>Michigan</td>
<td>2%</td>
</tr>
<tr>
<td>Illinois</td>
<td>2%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>2%</td>
</tr>
</tbody>
</table>
Pennsylvania Tourism Regions

- PA Regions Visited by Travelers’ State of Residence
- Percentage Return Trips
The Pocono Mountains region remained the most popular PA destination for marketable overnight travelers from New York state in 2015 – a 7 percentage point increase from 2014.
Pennsylvania Tourism Regions
REPEAT VISITORS - Residents of New York State

Over three-quarters of marketable overnight travelers from New York State who visited one of PA’s eastern tourism regions in 2015 had traveled there before.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocono Mountains</td>
<td>75%</td>
</tr>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>64%</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>81%</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>56%</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>66%</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>85%</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>29%</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>64%</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>40%</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>57%</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>64%</td>
</tr>
</tbody>
</table>

Base: Overnight Marketable Trips
As it has for at least the past five years, the Pocono Mountains remained the most popular PA destination for marketable overnight travelers from New Jersey in 2015.
A majority of travelers from New Jersey in 2015 had visited one or more of the eastern Pennsylvania tourism regions in the past.
Pennsylvania Tourism Regions
Regions Visited by Residents of Ohio

*Pittsburgh & Its Countryside and Pennsylvania’s Great Lakes Region remained the most popular PA destinations for marketable overnight travelers from Ohio in 2015.*

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>36%</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>14%</td>
</tr>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>7%</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>6%</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>6%</td>
</tr>
<tr>
<td>Upstate Pennsylvania</td>
<td>6%</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>5%</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>3%</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>3%</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>2%</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>2%</td>
</tr>
</tbody>
</table>
A majority of travelers from Ohio in 2015 had visited one or more of Pennsylvania’s tourism regions in the past.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>86%</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>76%</td>
</tr>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>74%</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>93%</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>91%</td>
</tr>
<tr>
<td>Upstate Pennsylvania</td>
<td>59%</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>61%</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>64%</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>66%</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>95%</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>60%</td>
</tr>
</tbody>
</table>
Nearly half of all overnight travelers from Maryland who visited Pennsylvania in 2015 chose a destination in the southeastern portion of the state.

- Dutch Country Roads: 21.5%
- Philadelphia & the Countryside: 19.2%
- Pittsburgh & Its Countryside: 18.5%
- Lehigh Valley: 6.7%
- Pennsylvania’s Great Lakes Region: 6.5%
- Laurel Highlands: 5.7%
- Upstate PA: 4.3%
- Pocono Mountains: 4.1%
- Valleys of the Susquehanna: 3.2%
- Alleghenies & Her Valleys: 2.9%
- Pennsylvania Wilds: 2.2%

Base: All Overnight Trips
A majority of travelers from Maryland in 2015 had visited one or more of the southeastern Pennsylvania tourism regions in the past.
Traveler Profile — Overnight Marketable Trips
Gender

Base: Marketable Overnight Trips

Percent of Total

Male
- Pennsylvania: 47%
- US Average: 49%

Female
- Pennsylvania: 53%
- US Average: 51%
Age

Percent of Total

Age (in years)

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>25 - 34</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>35 - 44</td>
<td>17</td>
<td>20</td>
</tr>
<tr>
<td>45 - 54</td>
<td>18</td>
<td>17</td>
</tr>
<tr>
<td>55 - 64</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>65+</td>
<td>12</td>
<td>17</td>
</tr>
</tbody>
</table>

Base: Marketable Overnight Trips

Median Age:

- Pennsylvania: 44.9
- U.S. Average: 44.2
<table>
<thead>
<tr>
<th>Race</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>85</td>
</tr>
<tr>
<td>African-American</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Marketable Overnight Trips

**Pennsylvania**

- White: 85%
- African-American: 6%
- Other: 9%

**US Average**

- White: 83%
- African-American: 7%
- Other: 10%
Hispanic Background

Base: Marketable Overnight Trips

Percent of Total

No

Yes

91

9

9

Pennsylvania

US Average
Marital Status

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/With Partner</td>
<td>65 Pennsylvania</td>
</tr>
<tr>
<td></td>
<td>64 US Average</td>
</tr>
<tr>
<td>Never Married</td>
<td>24 Pennsylvania</td>
</tr>
<tr>
<td></td>
<td>23 US Average</td>
</tr>
<tr>
<td>Divorced/Widowed/Separated</td>
<td>11 Pennsylvania</td>
</tr>
<tr>
<td></td>
<td>13 US Average</td>
</tr>
</tbody>
</table>
Household Size

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Pennsylvania</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>2 members</td>
<td>17</td>
<td>35</td>
</tr>
<tr>
<td>3 members</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>4+ members</td>
<td>18</td>
<td>28</td>
</tr>
</tbody>
</table>

Average Household Size: Pennsylvania 3.0 United States 2.8
Presence of Children in Household

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Children Under 18 Years of Age</td>
<td>51</td>
<td>53</td>
</tr>
<tr>
<td>At Least One Child Between 13-17 Years of Age</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>At Least One Child Between 6-12 Years of Age</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>At Least One Child Under 6 Years of Age</td>
<td>18</td>
<td>18</td>
</tr>
</tbody>
</table>
Presence of Children in Household by Age of Adult Traveler

Base: Marketable Overnight Trips

**Age Range of Adult Travelers**

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>55%</td>
<td>52%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>62%</td>
<td>65%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>65%</td>
<td>79%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>64%</td>
<td>78%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>65+</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Education

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>College graduate</td>
<td>40</td>
<td>41</td>
</tr>
<tr>
<td>Some college</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>High school or less</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Employment

Percent of Total

- Employed Full Time/ Self-Employed: 51% (Pennsylvania), 50% (US Average)
- Employed Part Time: 10% (Pennsylvania), 10% (US Average)
- Not Employed: 5% (Pennsylvania), 5% (US Average)
- Retired: 17% (Pennsylvania), 20% (US Average)
- Student: 7% (Pennsylvania), 6% (US Average)
- Homemaker: 9% (Pennsylvania), 7% (US Average)

Base: Marketable Overnight Trips
Income

Base: Marketable Overnight Trips

Percent of Total

- $150,000 and over: Pennsylvania 5, US Average 6
- $100,000-$149,999: Pennsylvania 15, US Average 16
- $75,000-$99,999: Pennsylvania 16, US Average 17
- $50,000-$74,999: Pennsylvania 23, US Average 23
- $30,000-$49,999: Pennsylvania 22, US Average 19
- Under $30,000: Pennsylvania 19, US Average 19
Trip Planning & Booking
2015 Marketable Overnight Trips
<table>
<thead>
<tr>
<th>Reason</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited before and wanted to see more</td>
<td>47</td>
<td>51</td>
</tr>
<tr>
<td>Live nearby</td>
<td>19</td>
<td>16</td>
</tr>
<tr>
<td>Recommendation from friend</td>
<td>19</td>
<td>16</td>
</tr>
<tr>
<td>Read a recommendation on social media</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Read an article/Heard a news story</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Saw/heard advertisement</td>
<td>5</td>
<td>2</td>
</tr>
</tbody>
</table>
As in prior years, the planning horizon was relatively short for most travelers to Pennsylvania, with over 60% planning their trip within two months of their departure date.
Information Sources Used for Planning the Trip (cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Local Visitors Bureaus/CoC: 4% (2015), 3% (2014)
- Magazines: 3% (2015), 2% (2014)
- Radio: 2% (2015), 2% (2014)
- A Toll-Free Number: 2% (2015), 2% (2014)
- Blogs: 2% (2015), 2% (2014)
- Travel Agent: 1% (2015), 1% (2014)
- Association/Club: 3% (2015), 1% (2014)
- Newspapers: 2% (2015), 1% (2014)
- Electronic Newsletter: 1% (2015), 1% (2014)
Use of Pennsylvania Tourism Office Trip Planning Tools

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Service</th>
<th>Percent of Total 2015</th>
<th>Percent of Total 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>23</td>
<td>25</td>
</tr>
<tr>
<td>Pennsylvania Travel Guide</td>
<td>21</td>
<td>23</td>
</tr>
<tr>
<td>Blog about Pennsylvania</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Pennsylvania Facebook Page</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>PURSUITS magazine</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Pennsylvania Twitter Page</td>
<td>5</td>
<td>4</td>
</tr>
</tbody>
</table>
www.visitpa.com Usefulness

Base: Marketable Overnight Trips

<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>2015</td>
<td>2</td>
<td>30</td>
<td>68</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

<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>2015</td>
<td>3</td>
<td>43</td>
<td>54</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Service Type</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Websites</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Online Booking Engines</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>Airline Websites</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Car Rental Websites</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>
Trip Elements Planned Using Internet

Base: Marketable Overnight Trips

Percent of Total

- Car Route/Locations/Map: 32% (2015) - 31% (2014)
- Local Activities/Attractions/Things to See and Do: 30% (2015) - 33% (2014)
- Packages Tours/Cruises: 2% (2015) - 5% (2014)
Reasons for Visiting www.visitpa.com

Base: Marketable Overnight Trips

Percent of Total

- To obtain more information after I decided to visit: 30% (2015), 25% (2014)
- To help me decide which Pennsylvania destination to visit: 26% (2015), 26% (2014)
- To help me decide to visit Pennsylvania: 18% (2015), 16% (2014)
- To learn more about Pennsylvania: 24% (2015), 30% (2014)
www.visitpa.com Influence on Planning

Base: Marketable Overnight Trips

2015
- No Influence: 8%
- Very little Influence: 15%
- Some Influence: 55%
- Large Influence: 22%

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

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

Base: Marketable Overnight Trips

2015

<table>
<thead>
<tr>
<th>No Influence</th>
<th>Very little Influence</th>
<th>Some Influence</th>
<th>Large Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>10</td>
<td>63</td>
<td>21</td>
</tr>
</tbody>
</table>

2014

<table>
<thead>
<tr>
<th>No Influence</th>
<th>Very little Influence</th>
<th>Some Influence</th>
<th>Large Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>9</td>
<td>60</td>
<td>24</td>
</tr>
</tbody>
</table>

4-Pt. Scale:  
- No Influence  
- Very little Influence  
- Some Influence  
- Large Influence
Channels to www.visitpa.com

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Channel</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Search</td>
<td>65</td>
<td>74</td>
</tr>
<tr>
<td>Magazine or Newspaper Advertisement</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>Internet Advertisement</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>Pennsylvania Travel Guide</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Family/Friend(s)/Colleague(s)</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Other Advertisement (e.g., Radio, Billboard, etc.)</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>Travel Brochure</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>Magazine or Newspaper Article/Programs</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Social Media (e.g. Facebook, Trip Advisor, etc.)</td>
<td>3</td>
<td>7</td>
</tr>
</tbody>
</table>
Technology
Used by Travelers

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Technology Used by Travelers</th>
<th>Planning the trip</th>
<th>During the trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop Computer</td>
<td>48</td>
<td>29</td>
</tr>
<tr>
<td>Desktop Computer</td>
<td>45</td>
<td>0</td>
</tr>
<tr>
<td>Smartphone</td>
<td>25</td>
<td>67</td>
</tr>
<tr>
<td>Tablet Computer</td>
<td>16</td>
<td>28</td>
</tr>
</tbody>
</table>
Social Media Channels Used by Travelers

Base: Marketable Overnight Trips

Percent of Total

- Facebook: 70%
- Pinterest: 25%
- Trip Advisor: 22%
- Twitter: 21%
- LinkedIn: 18%
Online Social Media Use by Travelers

Base: Marketable Overnight Trips

- Used any social media for travel: 70%
- Posted travel photos/video online: 35%
- Read travel reviews: 32%
- Looked at travel photos/video online: 24%
- Accessed travel news/events/deals/promotions: 21%
- Read a travel blog: 13%
- Contributed travel reviews: 13%
- Connected with others interested in travel: 12%
Online Social Media Use by Travelers (cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Used any social media for travel: 70%
- Got travel advice: 11%
- "Followed" a destination/attraction: 11%
- Gave travel advice: 9%
- Tweeted about a trip: 9%
- Subscribed to a travel e-newsletter: 5%
- Blogged about a trip: 5%
Planning Considerations Beyond Cost

<table>
<thead>
<tr>
<th>Reason</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>35</td>
<td>31</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>Performance/Event/Occasion I wanted to attend</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Nearby Destination</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Visit Family/Friends</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

Base: Marketable Overnight Trips
Percent of Travelers Booking In Advance

Base: Marketable Overnight Trips

Percent of Total

- 2014: 76%
- 2015: 77%

2014
2015
Booking Cycle

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Booking Cycle</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month or Less</td>
<td>54%</td>
</tr>
<tr>
<td>2 Months</td>
<td>20% 23%</td>
</tr>
<tr>
<td>3-5 Months</td>
<td>16% 17%</td>
</tr>
<tr>
<td>6 Months or More</td>
<td>10% 10%</td>
</tr>
</tbody>
</table>

2014 | 2015
---|---
| 54% | 51% |
| 20% | 23% |
| 16% | 17% |
| 10% | 10% |
Use of Vacation Packages and Group Travel

Base: Marketable Overnight Trips

Percent of Total

- Pre-Paid Package: 2015 - 12%, 2014 - 15%
- Escorted Group Tour: 2015 - 16%, 2014 - 18%
Trip Characteristics of Pennsylvania’s Marketable Overnight Travelers
### Distance Traveled to Pennsylvania

**Base:** Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Distance Range</th>
<th>Percent of Total 2015</th>
<th>Percent of Total 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 1,000 Miles</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>500-1,000 Miles</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>300-499 Miles</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>100-299 Miles</td>
<td>58</td>
<td>58</td>
</tr>
<tr>
<td>50-99 Miles</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Under 50 Miles</td>
<td>8</td>
<td>9</td>
</tr>
</tbody>
</table>
Total Nights Away From Home

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Duration</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Night</td>
<td>26</td>
<td>30</td>
</tr>
<tr>
<td>2 Nights</td>
<td>28</td>
<td>33</td>
</tr>
<tr>
<td>3-6 Nights</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>7+ Nights</td>
<td>13</td>
<td>8</td>
</tr>
</tbody>
</table>

Average Number of Nights

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>3.0</td>
<td>3.7</td>
</tr>
</tbody>
</table>
Length of Stay

Base: Marketable Overnight Trips

Average Number of Nights

2015
- Pennsylvania: 2.2
- Other Places: 0.0
- Total = 2.2

2014
- Pennsylvania: 2.2
- Other Places: 0.0
- Total = 2.2

* Those who spent at least one night anywhere in Pennsylvania
Accommodations*

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Percent of Total</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/Motel</td>
<td>67%</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>Friends or Relatives</td>
<td>11%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>House/Cottage/Cabin</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rented Campground/Trailer Park Site</td>
<td>10%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Rented Cottage/Cabin/Condominium</td>
<td>8%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>7%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Own House/Cottage/Cabin</td>
<td>5%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Time Sharing Unit</td>
<td>5%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Country Inn/Lodge</td>
<td>4%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Other Accommodation</td>
<td>3%</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

Average No. of People on Trip

2015
- 2.5 Adults
- 1.0 Children under 18
- Total = 3.5

2014
- 2.5 Adults
- 0.9 Children under 18
- Total = 3.4

Adults | Children under 18
Trip Experiences — Overnight Marketable Trips
Things Seen and Experienced on PA Trip

Base: Marketable Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic House/Museum</td>
<td>20</td>
<td>17</td>
</tr>
<tr>
<td>Scenic Drive</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>Farmer's Market/Farmstand</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Outlet Shopping</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>State or National Park</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Art Museum/Exhibit</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Other Shopping</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>Other Historic Site(s)</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Zoo</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Local Artist or Craft/Artisan</td>
<td>6</td>
<td>5</td>
</tr>
</tbody>
</table>
Things Seen and Experienced on PA Trip (cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Unique Shopping: 2015 - 5, 2014 - 8
- Civil War Site: 2015 - 5, 2014 - 4
- Other Museums: 2015 - 4, 2014 - 7
- Revolutionary War Site: 2015 - 4, 2014 - 4
- Cave: 2015 - 1, 2014 - 1
- Coal Mine: 2015 - 1, 2014 - 1
Dining/Entertainment

Base: Marketable Overnight Trips

Percent of Total

- Unique Local Foods: 13% (2015), 13% (2014)
- Nightlife: 11% (2015), 13% (2014)
- Casino or Racetrack: 9% (2015), 9% (2014)
- Bar/Disco/Nightclub: 8% (2015), 8% (2014)
- Fair or Festival: 8% (2015), 7% (2014)
- Up-Scale Restaurant: 7% (2015), 10% (2014)
- Other Live Performance: 4% (2015), 3% (2014)
- Local Music or Theater: 3% (2015), 3% (2014)
- Rock Concert: 2% (2015), 2% (2014)
- Dance Performance: 2% (2015), 2% (2014)
- Professional Theater: 1% (2015), 2% (2014)
- Auto Show: 1% (2015), 2% (2014)
Sports and Recreation

Percent of Total

- **Amusement/Waterpark**: 15% (2015), 14% (2014)
- **Camping**: 7% (2015), 7% (2014)
- **Hiking**: 7% (2015), 9% (2014)
- **Other Outdoor Sport/Activity**: 6% (2015), 9% (2014)
- **Professional/Collegiate Sports Event**: 5% (2015), 5% (2014)
- **Fishing**: 4% (2015), 7% (2014)
- **Biking**: 3% (2015), 2% (2014)
- **Snow Skiing/Snowboarding**: 3% (2015), 2% (2014)
- **Hunting**: 2% (2015), 2% (2014)
- **River Rafting**: 2% (2015), 1% (2014)
- **Motorcycle Touring**: 2% (2015), 1% (2014)
- **Amateur Sporting Event**: 3% (2015), 1% (2014)
- **Golfing**: 3% (2015), 1% (2014)
- **Extreme/Adventure Sports**: 1% (2015), 2% (2014)

Base: Marketable Overnight Trips
Activities by Origin Market of Marketable Overnight Travelers
Main Activities of NEW YORK Travelers Visiting PA vs. All Other U.S. Destinations

Pennsylvania continues to have a distinct advantage in attracting NY travelers interested in theme parks relative to other US destinations, but far less in other types of activities.

Base: Marketable Overnight Trips

- Shopping
- Theme Park
- Fine Dining
- Landmark/Historic Site
- Museum
- Swimming
- Casino
- National/State Park
- Theater
- Fair/Exhibition/Festival
- Beach/Waterfront
- Bar/Disco/Nightclub

Participation Rates
Percent of Total

To Pennsylvania
To All Other U.S. Destinations
Pennsylvania has an advantage over other US destinations in attracting NJ travelers who are interested in historic sites, museums, and theme parks.
Main Activities of OHIO Travelers Visiting PA vs. All Other U.S. Destinations

Pennsylvania has a distinct advantage over other U.S. destinations in attracting OH travelers interested in museums, historic sites, casinos, art galleries, and zoos.
Main Activities of MARYLAND Travelers Visiting PA vs. All Other U.S. Destinations

Pennsylvania has a clear advantage over other U.S. destinations in attracting MD travelers interested in museums, theme parks, and amateur/youth sporting events.
Pennsylvanians typically participate in more activities while on an out-of-state leisure trip compared to a trip within the state, except for hiking, camping, fishing, and sports events.
Activities by Presence/Absence of Children on Pennsylvania Leisure Trip
Travelers with children are far more likely to visit a theme park or zoo or outdoor activities, while those without children are more likely to enjoy fine dining, casinos, historic sites, and nightlife.
Main Activities - Travelers With No Children on Trip, By Age of Adult Traveler

Base: Marketable Overnight Trips

*Older PA travelers without children along on the trip were more likely to shop, enjoy fine dining, and visit historic sites, museums, and casinos than younger and middle-age travelers.*
Main Activities - Travelers With Children on Trip, By Age of Adult Traveler

**Base: Marketable Overnight Trips**

*Older travelers with children on the trip are more likely to visit museums, historic sites and fine dining, while younger travelers are more likely to take them camping and other outdoor activities.*

Note: Sample size for 65+ age group traveling with children was small.
Regional Attractions Visited
2015 Marketable Overnight Trips
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Erie</td>
<td>35</td>
</tr>
<tr>
<td>Presque Isle State Park</td>
<td>11</td>
</tr>
<tr>
<td>Presque Isle Downs &amp; Casino</td>
<td>8</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>8</td>
</tr>
<tr>
<td>Erie Art Museum</td>
<td>7</td>
</tr>
<tr>
<td>Erie Zoo &amp; Botanical Gardens</td>
<td>6</td>
</tr>
<tr>
<td>Splash Lagoon/Waldameer Water Parks</td>
<td>6</td>
</tr>
<tr>
<td>U.S. Brig Niagara/Erie Maritime Museum</td>
<td>6</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>5</td>
</tr>
<tr>
<td>Golf course</td>
<td>4</td>
</tr>
<tr>
<td>Tom Ridge Environmental Center</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Lake Erie Speedway</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
</tbody>
</table>

*Erie Area

Base: Total Overnight Trips
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

Base: Total Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grove City Shopping Outlets</td>
<td>7</td>
</tr>
<tr>
<td>Pymatuning State Park</td>
<td>5</td>
</tr>
<tr>
<td>Conneaut Lake</td>
<td>5</td>
</tr>
<tr>
<td>Erie National Wildlife Refuge</td>
<td>5</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>4</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>4</td>
</tr>
<tr>
<td>Cook Forest</td>
<td>3</td>
</tr>
<tr>
<td>Conneaut Lake Park</td>
<td>3</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>3</td>
</tr>
<tr>
<td>Oil Creek State Park</td>
<td>3</td>
</tr>
<tr>
<td>Oil City</td>
<td>3</td>
</tr>
<tr>
<td>Oil Creek &amp; Titusville Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Golf course</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Oil Heritage Region</td>
<td>1</td>
</tr>
<tr>
<td>Wendell August Forge</td>
<td>1</td>
</tr>
</tbody>
</table>

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

*Pittsburgh/Allegheny County

Percent of Total

- City of Pittsburgh: 37%
- Pittsburgh Zoo & PPG Aquarium: 14%
- Professional Sports Game (Pittsburgh Steelers/Pirates/Penguins): 11%
- Carnegie Museums: 10%
- Duquesne Incline: 10%
- Pittsburgh Cultural District: 10%
- Children's Museum of Pittsburgh: 7%
- Fort Pitt Museum: 6%
- Historic House/Museum: 6%
- College Sports Event: 6%

Base: Marketable Overnight Trips
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region* (cont’d)

Base: Marketable Overnight Trips

Percent of Total

*Pittsburgh/Allegheny County

- Andy Warhol Museum: 5%
- National Aviary: 5%
- Golf Course: 5%
- Kennywood Amusement Park: 5%
- Professional Cultural Performance (Pittsburgh Symphony/Ballet/Opera/Theater): 5%
- Cathedral of Learning: 4%
- Phipps Conservatory & Gardens: 3%
- Winery/Vineyard: 2%
- Underground Railroad: 1%
Pennsylvania Attractions/Events — Pittsburgh and Its Countryside Region*

Base: Marketable Overnight Trips

Percent of Total

- Amish Farms/Countryside: 5%
- Historic House/Museum: 5%
- The Meadows Casino: 2%
- A Covered Bridge: 2%
- Moraine State Park: 2%
- Yellow Creek State Park: 2%
- Historic Harmony/Harmony Museum: 1%
- Crooked Creek State Park/Environmental Learning Center: 1%
- Zelienople: 1%
- Lenape Heights: 1%
- Ryerson Station State Park: 1%
- Old Economy Village: 1%

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

Base: Overnight Trips

- Flight 93 National Memorial: 13%
- Fallingwater: 12%
- Ohiopyle/Ohiopyle State Park: 11%
- Winery/Vineyard: 10%
- Seven Springs Mountain Resort: 10%
- Historic House/Museum: 9%
- Other Frank Lloyd Wright Houses: 8%
- Fort Ligonier: 6%
Pennsylvania Attractions/Events — Laurel Highlands Region (cont’d)

Base: Total Overnight Trips

Percent of Total

- Idlewild & SoakZone: 6%
- Great Allegheny Passage Rail Trail: 5%
- Fort Necessity: 5%
- Underground Railroad site: 5%
- Bushy Run Battlefield: 4%
- Ligonier/Fort Ligonier Days: 3%
- Westmoreland Museum of American Art: 2%
- Mountain Playhouse: 2%
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Total Overnight Trips

Percent of Total

- Little Pine State Park: 10%
- Historic House/Museum: 6%
- Winery/Vineyard: 5%
- Little League World Series & Related Events: 5%
- Underground Railroad: 5%
- Millionaires' Row (Historic Homes): 4%
- Peter J. McGovern Little League Museum: 4%
- Piper Aviation Museum: 3%
- Golf course: 1%

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

- Allegheny National Forest: 11%
- Punxsutawney/Groundhog Phil: 5%
- Historic House/Museum: 5%
- Kinzua State Park/Kinzua Bridge/Kinzua Dam: 5%
- Pine Creek Gorge/Pennsylvania Grand Canyon: 4%
- Smethport: 4%
- Bucktail State Park: 4%
- Black Moshannon State Park: 4%
- Cook Forest State Park: 4%
- Pennsylvania Lumber Museum: 4%
- Eldred World War II Museum & Learning Center: 4%

Base: Total Overnight Trips

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

Base: Total Overnight Trips

Percent of Total

- S.B. Elliott State Park: 3%
- Quehanna: 3%
- Pennsylvania's Elk Herd/Elk State Park: 3%
- Clarion River: 2%
- The Woolrich Store & Outlet: 2%
- Zippo/Case Museum: 2%
- Cherry Springs/Dark Sky Preserve: 1%
- Underground Railroad: 1%
- Tionesta/Tionesta Lake: 1%
- Historic Curtin Village/Eagle Ironworks: 1%
- Kettle Creek State Park: 1%

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

Base: Total Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knoebels Amusement Park &amp; Resort</td>
<td>20</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>20</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>19</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>7</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>6</td>
</tr>
<tr>
<td>Ricketts Glen State Park</td>
<td>5</td>
</tr>
<tr>
<td>Golf Course</td>
<td>5</td>
</tr>
<tr>
<td>Joseph Priestley House</td>
<td>2</td>
</tr>
<tr>
<td>Bloomsburg Fair</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Total Overnight Trips

Penn State University: 34%
Penn State Sports Event: 6%
Historic Home/Museum: 3%
Winery/Vineyard: 3%
Toftrees Golf Resort: 3%
Penn State All Sports Museum: 2%
Central Pennsylvania Festival of the Arts: 2%
Pennsylvania Military Museum: 2%
American Philatelic Society: 1%
Penn's Cave & Wildlife Park: 1%
Pennsylvania Attractions/Events — The Alleghenies Region*

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horseshoe Curve</td>
<td>4</td>
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<tr>
<td>Lakemont Park</td>
<td>4</td>
</tr>
<tr>
<td>Prince Gallitzin Chapel House</td>
<td>3</td>
</tr>
<tr>
<td>Boyer Candy Company</td>
<td>3</td>
</tr>
<tr>
<td>Johnstown Flood Museum/Memorial</td>
<td>3</td>
</tr>
<tr>
<td>Bedford Springs</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Thunder in the Valley</td>
<td>3</td>
</tr>
<tr>
<td>Raystown Lake</td>
<td>2</td>
</tr>
<tr>
<td>Altoona Railroad Museum</td>
<td>2</td>
</tr>
<tr>
<td>Allegheny Portage Railroad National Historic Site</td>
<td>2</td>
</tr>
</tbody>
</table>

Base: Total Overnight Trips

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

Base: Total Overnight Trips

Percent of Total

- Johnstown Inclined Plane: 2
- Shawnee State Park: 2
- Indian Caverns/Lincoln Caverns: 2
- Blue Knob State Park: 2
- Gravity Hill: 2
- Golf course: 1
- Winery/Vineyard: 1
- Seldom Seen Valley Tourist Coal Mine: 1
- Underground Railroad: 1
- Historic Home/Museum: 1

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

*Base: Total Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/St.</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Covered Bridges</td>
<td>6</td>
</tr>
<tr>
<td>The Downs at Carbondale</td>
<td>5</td>
</tr>
<tr>
<td>Endless Mountains Nature Center</td>
<td>5</td>
</tr>
<tr>
<td>Loyalsock State Forest</td>
<td>5</td>
</tr>
<tr>
<td>Eagle's Mere Historic Village</td>
<td>5</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>4</td>
</tr>
<tr>
<td>Pennsylvania Anthracite Coal Miners Memorial</td>
<td>4</td>
</tr>
<tr>
<td>Ricketts Glen State Park</td>
<td>4</td>
</tr>
<tr>
<td>Golf course</td>
<td>3</td>
</tr>
<tr>
<td>Old Mill Village Museum</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Base: Total Overnight Trips  

*Wilkes-Barre/Scranton Area

Percent of Total

- Mohegan Sun at Pocono Downs: 17%
- Steamtown National Historic Site: 8%
- Hickory Run State Park: 7%
- Covered Bridges: 6%
- Ricketts Glen State Park: 6%
- Lackawanna Coal Mine Tour: 5%
- PA Anthracite Coal Museum: 5%
- Winery/Vineyard: 5%
- Golf course: 5%
- Historic Home/Museum: 5%
- Lackawanna Electric Trolley Museum: 4%
- Underground Railroad: 1%
- The Downs at Hazleton: 1%
- Pioneer Tunnel Coal Mine: 1%
Pennsylvania Attractions/Events — Pocono Mountains Region

Base: Marketable Overnight Trips

Percent of Total

- Bushkill Falls: 17
- Delaware Water Gap: 15
- Mount Airy Casino Resort: 14
- The Crossings Premium Outlets: 13
- Pocono Raceway: 13
- Camelback Waterpark: 9
- Pocono Indian Museum: 9
- Great Wolf Lodge: 8
- Caesar's Resort: 7
- Lake Wallenpaupack: 6
- Jim Thorpe: 5
- Upper Delaware Scenic & Recreation River: 4
Pennsylvania Attractions/Events — Pocono Mountains Region (cont’d)

- Promised Land State Park: 4
- Hickory Run State Park & Big Boulder Field: 3
- Covered Bridges: 3
- Historic Home/Museum: 3
- Winery/Vineyard: 2
- Golf course: 2
- Gray Towers: 2
- The Downs at East Stroudsburg: 2
- Tobyhanna State Park: 2
- No. 9 Mine & Museum: 1

Base: Marketable Overnight Trips
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Event</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gettysburg Battlefield/National Military Park</td>
<td>15</td>
</tr>
<tr>
<td>Gettysburg National Military Park &amp; Museum</td>
<td>13</td>
</tr>
<tr>
<td>Gettysburg Diorama</td>
<td>11</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>9</td>
</tr>
<tr>
<td>Outlet Malls at Gettysburg Village</td>
<td>7</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>5</td>
</tr>
<tr>
<td>Eisenhower National Historic Site</td>
<td>5</td>
</tr>
<tr>
<td>General Lee's Headquarters</td>
<td>4</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>1</td>
</tr>
<tr>
<td>Land of Little Horses</td>
<td>1</td>
</tr>
<tr>
<td>Golf course</td>
<td>1</td>
</tr>
<tr>
<td>Hall of Presidents &amp; First Ladies</td>
<td>1</td>
</tr>
</tbody>
</table>

*Gettysburg (Adams County) Area

Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum had a combined net participation rate of 16%
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Marketable Overnight Trips

Percent of Total

- Hershey Park: 23%
- The Hershey Story, The Museum on Chocolate Avenue: 14%
- Outlets at Hershey: 9%
- Hershey Gardens: 7%
- Historic Home/Museum: 5%
- Hershey Theater: 4%
- Pennsylvania State Capitol: 3%
- Covered Bridges: 2%
- Indian Echo Caverns: 2%
- Golf course: 1%

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

Percent of Total

- Amish Farms/Countryside: 27%
- Covered Bridges: 15%
- Outlet Mall (Rockvale, Tanger): 13%
- Strasburg Railroad/Traintown: 11%
- Historic Home/Museum: 11%
- Lancaster Central Market: 9%
- Dutch Wonderland Family Amusement Park: 9%
- Railroad Museum of Pennsylvania: 4%

*Lancaster Amish Farmland Area

Base: Marketable Overnight Trips
Pennsylvania Attractions/Events — Dutch Country Roads Region* (cont’d)

Base: Marketable Overnight Trips

Percent of Total

- Winery/Vineyard: 3
- National Toy Train Museum: 3
- Cherry Crest Adventure Farm: 2
- Underground Railroad: 2
- People’s Place Quilt Museum: 1
- Historic Lancaster Walking Tour: 1
- Ephrata Cloister: 1
- Landis Valley Museum: 1

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

Base: Marketable Overnight Trips

Percent of Total

- Snyder's of Hanover: 2
- Historic Home/Museum: 2
- Utz Quality Foods Factory: 1
- Cabela's: 1

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

Base: Total Overnight Trips

Percent of Total

- Bethlehem Sands Casino Resort: 18%
- Covered Bridges: 13%
- Crayola Factory: 11%
- Dorney Park & Wildwater Kingdom: 10%
- Historic Home/Museum: 9%
- Winery/Vineyard: 8%
- The Downs at Lehigh Valley: 7%
- Martin Guitars: 2%
- National Canal Museum: 1%
- Museum of Indian Culture: 1%
- National Museum of Industrial History: 1%
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*

Base: Marketable Overnight Trips

Liberty Bell/Liberty Bell Center: 27%
Independence Hall/Independence Visitor Center: 27%
Historic Home/Museum: 17%
Philadelphia Museum of Art: 14%
Reading Terminal Market: 13%
National Constitution Center: 11%
The Franklin (institute): 11%
Philadelphia Zoo: 9%
Eastern State Penitentiary Historic Site: 6%
Academy of Natural Sciences: 5%
US Mint: 4%

*Philadelphia
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region* (cont’d)

Base: Marketable Overnight Trips

Percent of Total

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

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

Base: Marketable Overnight Trips

Percent of Total

- Brandywine Battlefield Park: 3
- Historic Home/Museum: 1
- Covered Bridges: 1
- Winery/Vineyard: 1
- Longwood Gardens: 1
- Underground Railroad: 1
- QVC Studio: 1

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

Base: Marketable Overnight Trips

Percent of Total

- Sesame Place: 5
- Covered Bridges: 5
- Prime Outlets: 4
- King of Prussia Mall: 4
- Valley Forge National Historic Park: 2
- Peddler's Village: 2
- The Barnes Foundation: 1
- Pearl S Buck House: 1
- Philadelphia Park Casino & Racetrack: 1
- Washington Crossing: 1

*Remainder of Region
Factors Influencing Choice of Pennsylvania Tourism Region
Factors Influential In Choice of Pennsylvania’s Great Lakes Region

Base: Total Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>83</td>
<td>73</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>75</td>
<td>65</td>
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<tr>
<td>Affordable attractions/events</td>
<td>74</td>
<td>65</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>65</td>
<td>65</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>64</td>
<td>57</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td>60</td>
<td>57</td>
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<tr>
<td>Availability of economy or budget accommodations</td>
<td>59</td>
<td>60</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>59</td>
<td>59</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>57</td>
<td>59</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>57</td>
<td>57</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>56</td>
<td>56</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
## Factors Influential In Choice of Pennsylvania’s Great Lakes Region (cont’d)

### % Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>Base: Total Overnight Trips</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of mid-range accommodations</td>
<td></td>
<td>48</td>
<td>56</td>
</tr>
<tr>
<td>Great shopping</td>
<td></td>
<td>47</td>
<td>56</td>
</tr>
<tr>
<td>A fun city environment</td>
<td></td>
<td>46</td>
<td>56</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td></td>
<td>36</td>
<td>54</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td></td>
<td>36</td>
<td>53</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td></td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td></td>
<td>48</td>
<td>52</td>
</tr>
<tr>
<td>A fun place for couples</td>
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<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td></td>
<td>48</td>
<td>49</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td></td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td></td>
<td>31</td>
<td>42</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td></td>
<td>31</td>
<td>39</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale*
Factors Influential in Choice of Pittsburgh & Its Countryside Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 77% (2015), 65% (2014)
- Convenient access by car: 61% (2015), 56% (2014)
- Lots of things for adults to see and do: 57% (2015), 51% (2014)
- Affordable attractions/events: 54% (2015), 56% (2014)
- Having family or friends who live in the region: 53% (2015), 53% (2014)
- A fun city environment: 50% (2015), 49% (2014)
- Unique or local food and cuisine: 46% (2015), 44% (2014)
- Availability of mid-range accommodations: 44% (2015), 43% (2014)
- Lots of information about the destination on the Internet: 42% (2015), 38% (2014)
- Lots of cultural things to see or experience: 42% (2015), 41% (2014)
- Being at a place I’ve never seen before: 41% (2015), 39% (2014)
- Lots of historic things to see or experience: 40% (2015), 38% (2014)

* Rated 8, 9 or 10 on 10-pt. Importance scale
### Factors Influential in Choice of Pittsburgh & Its Countryside Region (cont’d)

#### % Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for couples</td>
<td>39</td>
<td>37</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>33</td>
<td>34</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>33</td>
<td>35</td>
</tr>
<tr>
<td>Great shopping</td>
<td>33</td>
<td>37</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>32</td>
<td>27</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>28</td>
<td>32</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>20</td>
<td>19</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>18</td>
<td>24</td>
</tr>
</tbody>
</table>

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

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Base: Total Overnight Trips
Factors Influential In Choice of Laurel Highlands Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 61% (2015) vs 67% (2014)
- Affordable attractions/events: 52% (2015) vs 59% (2014)
- Convenient access by car: 55% (2015) vs 58% (2014)
- Having family or friends who live in the region: 53% (2015) vs 58% (2014)
- Lots of historic things to see or experience: 45% (2015) vs 38% (2014)
- Lots of cultural things to see or experience: 43% (2015) vs 34% (2014)
- Lots of things for adults to see and do: 48% (2015) vs 43% (2014)
- Being at a place I’ve never seen before: 43% (2015) vs 39% (2014)
- Unique or local food and cuisine: 42% (2015) vs 32% (2014)
- A fun place for couples: 40% (2015) vs 33% (2014)
- A fun city environment: 36% (2015) vs 35% (2014)
- Within a two-to-four-hour drive from home: 35% (2015) vs 35% (2014)

*Caution: small sample size

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

Within a two-hour drive from home
Availability of economy or budget accommodations
Different or unique local artwork/craftwork
Availability of mid-range accommodations
A great rural/agricultural area
Lots of things for children to see and do
Great opportunities for nature/eco-travel
Lots of information about the destination on the Internet
Focus on “green travel”
Great shopping
Availability of camping or RV facilities
Availability of luxury accommodations

% Rating Factor As Very Important*

Base: Total Overnight Trips

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

*Caution: small sample size
Factors Influential In Choice of Pennsylvania Wilds Region

*Caution: small sample size

- Feeling safe at the destination: 72% (2015), 73% (2014)
- Affordable attractions/events: 51% (2015), 69% (2014)
- Convenient access by car: 58% (2015), 64% (2014)
- Having family or friends who live in the region: 52% (2015), 61% (2014)
- Within a two-to-four-hour drive from home: 41% (2015), 54% (2014)
- Availability of mid-range accommodations: 26% (2015), 53% (2014)
- Availability of economy or budget accommodations: 36% (2015), 52% (2014)
- Lots of things for adults to see and do: 36% (2015), 52% (2014)
- Lots of historic things to see or experience: 33% (2015), 50% (2014)
- Being at a place I've never seen before: 36% (2015), 49% (2014)
- Unique or local food and cuisine: 28% (2015), 45% (2014)
- A fun place for couples: 28% (2015), 42% (2014)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Pennsylvania Wilds Region (cont’d)

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015 %</th>
<th>2014 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>41</td>
<td>32</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>25</td>
<td>39</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>39</td>
<td>37</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>22</td>
<td>38</td>
</tr>
<tr>
<td>Great shopping</td>
<td>27</td>
<td>38</td>
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<tr>
<td>Lots of information about the destination on the Internet</td>
<td>29</td>
<td>38</td>
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<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>29</td>
<td>36</td>
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<tr>
<td>A fun city environment</td>
<td>30</td>
<td>36</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>35</td>
<td>32</td>
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<tr>
<td>Availability of luxury accommodations</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>22</td>
<td>31</td>
</tr>
</tbody>
</table>

*Caution: small sample size

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Valleys of the Susquehanna Region

Base: Total Overnight Trips

% Rating Factor As Very Important*

- Convenient access by car: 79% (2015), 57% (2014)
- Feeling safe at the destination: 78% (2015), 70% (2014)
- Affordable attractions/events: 58% (2015), 52% (2014)
- Having family or friends who live in the region: 58% (2015), 49% (2014)
- Within a two-to-four-hour drive from home: 52% (2015), 47% (2014)
- Being at a place I’ve never seen before: 47% (2015), 34% (2014)
- Within a two-hour drive from home: 43% (2015), 30% (2014)
- Availability of mid-range accommodations: 42% (2015), 30% (2014)
- Lots of cultural things to see or experience: 38% (2015), 29% (2014)
- A fun place for couples: 35% (2015), 21% (2014)
- Lots of things for adults to see and do: 38% (2015), 34% (2014)
- Lots of historic things to see or experience: 36% (2015), 33% (2014)

* Caution: small sample size

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Valleys of the Susquehanna Region (cont’d)

A great rural/agricultural area
Lots of things for children to see and do
Availability of economy or budget accommodations
A fun city environment
Availability of camping or RV facilities
Great shopping
Unique or local food and cuisine
Availability of luxury accommodations
Great opportunities for nature/eco-travel
Lots of information about the destination on the Internet
Different or unique local artwork/craftwork
Focus on “green travel”

% Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great rural/agricultural area</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>22</td>
<td>32</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>30</td>
<td>43</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>27</td>
<td>30</td>
</tr>
<tr>
<td>Great shopping</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>29</td>
<td>35</td>
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<tr>
<td>Availability of luxury accommodations</td>
<td>28</td>
<td>26</td>
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<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>26</td>
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<tr>
<td>Lots of information about the destination on the Internet</td>
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<td>Focus on “green travel”</td>
<td>8</td>
<td>29</td>
</tr>
</tbody>
</table>

* Caution: small sample size

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of The Alleghenies Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 64% (2015) vs. 64% (2014)
- Having family or friends who live in the region: 50% (2015) vs. 50% (2014)
- Affordable attractions/events: 50% (2015) vs. 47% (2014)
- Lots of things for adults to see and do: 39% (2015) vs. 46% (2014)
- Being at a place I've never seen before: 32% (2015) vs. 45% (2014)
- Convenient access by car: 44% (2015) vs. 48% (2014)
- Unique or local food and cuisine: 40% (2015) vs. 31% (2014)
- Lots of historic things to see or experience: 39% (2015) vs. 39% (2014)
- Within a two-to-four-hour drive from home: 36% (2015) vs. 31% (2014)
- Lots of cultural things to see or experience: 35% (2015) vs. 32% (2014)
- A fun city environment: 32% (2015) vs. 33% (2014)
- A great rural/agricultural area: 30% (2015) vs. 31% (2014)

Base: Total Overnight Trips

* Rated 8, 9 or 10 on 10-pt. Importance scale
### Factors Influential In Choice of The Alleghenies Region (cont’d)

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for couples</td>
<td>30</td>
<td>29</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>29</td>
<td>26</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>29</td>
<td>22</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Great shopping</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
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<td>36</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>22</td>
<td>28</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>20</td>
<td>14</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>19</td>
<td>28</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>16</td>
<td>18</td>
</tr>
</tbody>
</table>

* % Rating Factor As Very Important*

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Upstate PA Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 70% (2015), 75% (2014)
- Convenient access by car: 60% (2015), 63% (2014)
- Affordable attractions/events: 58% (2015), 54% (2014)
- Lots of things for adults to see and do: 53% (2015), 52% (2014)
- Having family or friends who live in the region: 60% (2015), 60% (2014)
- Availability of economy or budget accommodations: 45% (2015), 45% (2014)
- Unique or local food and cuisine: 43% (2015), 39% (2014)
- Availability of mid-range accommodations: 48% (2015), 42% (2014)
- Great shopping: 42% (2015), 36% (2014)
- Within a two-to-four-hour drive from home: 41% (2015), 41% (2014)
- Being at a place I've never seen before: 41% (2015), 38% (2014)
- Lots of information about the destination on the Internet: 38% (2015), 36% (2014)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Upstate PA Region (cont’d)

<table>
<thead>
<tr>
<th>Factor</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun city environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
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<td></td>
</tr>
<tr>
<td>A fun place for couples</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
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</tr>
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<td>Availability of luxury accommodations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Pocono Mountains Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 79% (2015), 78% (2014)
- Convenient access by car: 71% (2015), 69% (2014)
- Affordable attractions/events: 66% (2015), 62% (2014)
- Lots of things for adults to see and do: 60% (2015), 59% (2014)
- Within a two-to-four-hour drive from home: 52% (2015), 50% (2014)
- Within a two-hour drive from home: 49% (2015), 43% (2014)
- Availability of mid-range accommodations: 48% (2015), 48% (2014)
- A fun place for couples: 45% (2015), 43% (2014)
- Unique or local food and cuisine: 48% (2015), 43% (2014)
- Great shopping: 41% (2015), 35% (2014)
- Being at a place I’ve never seen before: 45% (2015), 41% (2014)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Pocono Mountains Region (cont’d)

% Rating Factor As Very Important*

- Availability of economy or budget accommodations: 41%
- Lots of things for children to see and do: 39%
- Having family or friends who live in the region: 40%
- Availability of luxury accommodations: 36%
- Lots of historic things to see or experience: 32%
- Lots of information about the destination on the Internet: 45%
- Lots of cultural things to see or experience: 34%
- Different or unique local artwork/craftwork: 36%
- Great opportunities for nature/eco-travel: 33%
- A great rural/agricultural area: 30%
- Availability of camping or RV facilities: 21%
- Focus on “green travel”: 23%

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Dutch Country Roads Region

Base: Marketable Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 76% in 2015, 76% in 2014
- Affordable attractions/events: 67% in 2015, 71% in 2014
- Convenient access by car: 66% in 2015, 70% in 2014
- Lots of things for adults to see and do: 62% in 2015, 61% in 2014
- Availability of mid-range accommodations: 54% in 2015, 52% in 2014
- Lots of historic things to see or experience: 45% in 2015, 53% in 2014
- Unique or local food and cuisine: 45% in 2015, 53% in 2014
- Being at a place I’ve never seen before: 43% in 2015, 52% in 2014
- Lots of cultural things to see or experience: 43% in 2015, 50% in 2014
- Lots of information about the destination on the Internet: 44% in 2015, 49% in 2014
- Within a two-to-four-hour drive from home: 45% in 2015, 50% in 2014
- Availability of economy or budget accommodations: 43% in 2015, 41% in 2014

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great rural/agricultural area</td>
<td>38</td>
<td>42</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>Great shopping</td>
<td>35</td>
<td>39</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>34</td>
<td>24</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>21</td>
<td>18</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td>20</td>
<td>21</td>
</tr>
</tbody>
</table>

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Lehigh Valley Region

% Rating Factor As Very Important*

- Feeling safe at the destination: 68% (2015), 68% (2014)
- Convenient access by car: 55% (2015), 56% (2014)
- Lots of things for adults to see and do: 45% (2015), 44% (2014)
- Affordable attractions/events: 44% (2015), 47% (2014)
- Having family or friends who live in the region: 43% (2015), 50% (2014)
- Within a two-hour drive from home: 41% (2015), 40% (2014)
- Being at a place I've never seen before: 39% (2015), 36% (2014)
- Within a two-to-four-hour drive from home: 38% (2015), 39% (2014)
- Unique or local food and cuisine: 37% (2015), 37% (2014)
- Great shopping: 36% (2015), 36% (2014)
- A fun place for couples: 35% (2015), 37% (2014)
- A fun city environment: 27% (2015), 34% (2014)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Lehigh Valley Region (cont’d)

% Rating Factor As Very Important*

- Availability of mid-range accommodations
  - 2015: 34%
  - 2014: 40%
- Lots of cultural things to see or experience
  - 2015: 34%
  - 2014: 38%
- Lots of historic things to see or experience
  - 2015: 30%
  - 2014: 39%
- Different or unique local artwork/craftwork
  - 2015: 30%
  - 2014: 31%
- A great rural/agricultural area
  - 2015: 29%
  - 2014: 26%
- Lots of information about the destination on the Internet
  - 2015: 29%
  - 2014: 35%
- Availability of luxury accommodations
  - 2015: 28%
  - 2014: 23%
- Availability of economy or budget accommodations
  - 2015: 28%
  - 2014: 37%
- Lots of things for children to see and do
  - 2015: 25%
  - 2014: 33%
- Great opportunities for nature/eco-travel
  - 2015: 23%
  - 2014: 27%
- Focus on “green travel”
  - 2015: 17%
  - 2014: 22%
- Availability of camping or RV facilities
  - 2015: 13%
  - 2014: 19%

* Rated 8, 9 or 10 on 10-pt. Importance scale
Factors Influential In Choice of Philadelphia & The Countryside Region

Base: Marketable Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 72% (2015), 69% (2014)
- A fun city environment: 61% (2015), 64% (2014)
- Lots of things for adults to see and do: 61% (2015), 62% (2014)
- Convenient access by car: 56% (2015), 59% (2014)
- Affordable attractions/events: 66% (2015), 58% (2014)
- Lots of cultural things to see or experience: 54% (2015), 57% (2014)
- Unique or local food and cuisine: 55% (2015), 54% (2014)
- Being at a place I’ve never seen before: 57% (2015), 51% (2014)
- Lots of historic things to see or experience: 54% (2015), 46% (2014)
- Availability of mid-range accommodations: 53% (2015), 46% (2014)
- Lots of information about the destination on the Internet: 54% (2015), 45% (2014)
- Availability of economy or budget accommodations: 45% (2015), 42% (2014)

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

% Rating Factor As Very Important*

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>A fun place for a vacation/getaway</th>
<th></th>
<th>A place I would feel welcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lots to see and do</td>
<td>7</td>
<td>Beautiful gardens &amp; parks</td>
</tr>
<tr>
<td>2</td>
<td>Good place to get away and relax</td>
<td>8</td>
<td>Great place for walking/strolling about</td>
</tr>
<tr>
<td>3</td>
<td>A good place for couples to visit</td>
<td>9</td>
<td>Safe place to travel in tourist areas</td>
</tr>
<tr>
<td>4</td>
<td>Good for adult vacation/getaway</td>
<td>10</td>
<td>Affordable accommodations</td>
</tr>
<tr>
<td>5</td>
<td>Good place for families to visit</td>
<td>11</td>
<td>Interesting festivals/fairs</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Overnight Trips
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 its history, beautiful scenery, access, proximity, a good place for adults to visit and it’s well-known landmarks. Pennsylvania is also seen as a safe, relaxing, fun, interesting, welcoming place with lots to see and do.
Pennsylvania’s Product Delivery

Base: Marketable Overnight Trips

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Atmosphere</td>
<td>71</td>
</tr>
<tr>
<td>Worry Free</td>
<td>70</td>
</tr>
<tr>
<td>Affordable</td>
<td>70</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>68</td>
</tr>
<tr>
<td>Exciting</td>
<td>67</td>
</tr>
<tr>
<td>Family Destination</td>
<td>67</td>
</tr>
<tr>
<td>Climate</td>
<td>67</td>
</tr>
<tr>
<td>Unique</td>
<td>60</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>58</td>
</tr>
<tr>
<td>Entertainment</td>
<td>57</td>
</tr>
<tr>
<td>Luxurious</td>
<td>56</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Adult Atmosphere: 71%
- Good for adult vacation/getaway: 73%
- A good place for couples to visit: 70%
Pennsylvania’s Product Delivery — Exciting

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Exciting: 67%
- A fun place for a vacation/getaway: 71%
- Exciting destination: 63%

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Pennsylvania’s Product Delivery — Worry Free

Percent Who Strongly Agree

- Worry Free: 70%
- Good place to get away and relax: 72%
- Safe place to travel in tourist areas: 72%
- A place I would feel welcome: 69%
- Warm/friendly people: 66%

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

Percent Who Strongly Agree

Climate: 67

Climate was perfect for what we wanted to do: 67

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

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Family Destination: 67%
- Good place for families to visit: 72%
- A place welcoming for children: 65%
- A fun place for kids: 64%
### Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>68%</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>75%</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>75%</td>
</tr>
<tr>
<td>Authentic historical sites</td>
<td>73%</td>
</tr>
<tr>
<td>Well-known landmarks</td>
<td>73%</td>
</tr>
<tr>
<td>Great wilderness areas</td>
<td>72%</td>
</tr>
<tr>
<td>Lots to see and do</td>
<td>72%</td>
</tr>
<tr>
<td>Great place for walking/strolling about</td>
<td>71%</td>
</tr>
<tr>
<td>Excellent State/National parks</td>
<td>70%</td>
</tr>
<tr>
<td>Interesting small towns/villages</td>
<td>69%</td>
</tr>
<tr>
<td>Excellent museums/art galleries</td>
<td>68%</td>
</tr>
<tr>
<td>Beautiful gardens &amp; parks</td>
<td>68%</td>
</tr>
<tr>
<td>Interesting cities</td>
<td>68%</td>
</tr>
<tr>
<td>Great farm stands/farmers' markets</td>
<td>67%</td>
</tr>
<tr>
<td>Interesting festivals/ fairs</td>
<td>67%</td>
</tr>
<tr>
<td>Great place for birding/nature viewing</td>
<td>64%</td>
</tr>
<tr>
<td>Great place for antiquing</td>
<td>62%</td>
</tr>
<tr>
<td>Too much to do and see in just one visit</td>
<td>62%</td>
</tr>
<tr>
<td>Authentic &amp; exciting historical re-enactments</td>
<td>62%</td>
</tr>
<tr>
<td>Great shopping</td>
<td>58%</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Affordable

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Affordable: 70%
- Easy to get to: 74%
- Not too far away for a vacation: 74%
- Close enough for a weekend getaway: 73%
- Very affordable for a getaway weekend: 68%
- Great value for the money: 67%
- Affordable accommodations: 66%
- Very affordable vacation destination: 65%
Pennsylvania’s Product Delivery — Unique

Percent Who Strongly Agree

- Unique: 60%
- Unique & Interesting customs/traditions: 62%
- Lots of unique local cuisine: 60%
- Talented artisans: 59%

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

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Entertainment: 57%
- Great for theater and the arts: 59%
- Great live music: 56%

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

Base: Marketable Overnight Trips

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Service</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxurious</td>
<td>56</td>
</tr>
<tr>
<td>First-class hotels</td>
<td>60</td>
</tr>
<tr>
<td>First-class resorts</td>
<td>56</td>
</tr>
<tr>
<td>Good place to find elegant, sophisticated restaurants</td>
<td>54</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Sports & Recreation

Base: Marketable Overnight Trips

Percent Who Strongly Agree

- Sports and Recreation: 58%
- Great camping: 64%
- Good place for skiing/winter sports: 63%
- Excellent fishing: 59%
- Great mountain/off-road bicycling: 58%
- Great leisure biking: 56%
- Excellent hunting: 56%
- Good place for extreme/adventure sports: 56%
- Fun & challenging golf courses: 54%
Pennsylvania’s Top 20 Image Attributes

Percent Who Strongly Agree

- Noted for its history: 75%
- Truly beautiful scenery: 75%
- Easy to get to: 74%
- Not too far away for a vacation: 74%
- Close enough for a weekend getaway: 73%
- Authentic historical sites: 73%
- Good for adult vacation/getaway: 73%
- Well-known landmarks: 73%
- Safe place to travel in tourist areas: 72%
- Good place to get away and relax: 72%
Pennsylvania’s Top 20 Image Attributes (cont’d)

Percent Who Strongly Agree

- Great wilderness areas: 72%
- Lots to see and do: 72%
- Great place for walking/strolling about: 71%
- A fun place for a vacation/getaway: 71%
- Excellent State/National parks: 70%
- A good place for couples to visit: 70%
- Interesting small towns/villages: 69%
- A place I would feel welcome: 69%
- Excellent museums/art galleries: 68%
- Beautiful gardens & parks: 68%

Base: Marketable Overnight Trips
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents

Base: Marketable Overnight Trips

Percent who strongly agree

- Close enough for a weekend getaway: PA Residents 79%, Non-Residents 71%
- Noted for its history: PA Residents 77%, Non-Residents 74%
- Not too far away for a vacation: PA Residents 75%, Non-Residents 73%
- Authentic historical sites: PA Residents 75%, Non-Residents 73%
- A place I would feel welcome: PA Residents 75%, Non-Residents 66%
- Easy to get to: PA Residents 74%, Non-Residents 74%
- Good place to get away and relax: PA Residents 74%, Non-Residents 72%
- Safe place to travel in tourist areas: PA Residents 73%, Non-Residents 72%
- Truly beautiful scenery: PA Residents 73%, Non-Residents 76%
- Excellent State/National parks: PA Residents 73%, Non-Residents 69%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents (cont’d)

Percent who strongly agree

- Well-known landmarks: PA Residents 73%, Non-Residents 73%
- Interesting small towns/villages: PA Residents 71%, Non-Residents 68%
- Great wilderness areas: PA Residents 71%, Non-Residents 73%
- Good place for families to visit: PA Residents 73%, Non-Residents 73%
- Very affordable vacation destination: PA Residents 63%, Non-Residents 70%
- Great farm stands/farmers’ markets: PA Residents 70%, Non-Residents 70%
- Very affordable for a getaway weekend: PA Residents 70%, Non-Residents 67%
- A good place for couples to visit: PA Residents 69%, Non-Residents 70%
- Interesting festivals/ fairs: PA Residents 66%, Non-Residents 69%
- Warm/friendly people: PA Residents 69%, Non-Residents 65%

Base: Marketable Overnight Trips
Trip Benefits — Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip

Percent of Total

- Relaxed/relieved stress: 61% (2015), 64% (2014)
- Break from the day-to-day: 47% (2015), 47% (2014)
- Created lasting memories: 37% (2015), 39% (2014)
- Enriched relationship with family/friends: 32% (2015), 34% (2014)
- No fixed schedule: 28% (2015), 31% (2014)
- Visited a place I've never seen before: 18% (2015), 20% (2014)
- Improved family ties: 17% (2015), 17% (2014)
- Enhanced knowledge of history: 16% (2015), 16% (2014)
- Renewed personal connections: 16% (2015), 17% (2014)

Base: Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip (cont’d)

- Arrived home with great stories: 18% (2014), 16% (2015)
- Try new things: 17% (2014), 15% (2015)
- Physically challenged and energized: 12% (2014), 9% (2015)
- Better outlook on life: 11% (2014), 8% (2015)
- Intellectually challenged and energized: 7% (2014), 6% (2015)
- Was pampered: 8% (2014), 6% (2015)
- Gained new skill(s): 3% (2014), 3% (2015)

Base: Marketable Overnight Trips
Pennsylvania
Day-Trips
Origin Markets — Pennsylvania Day-Trips
State Origin Markets for Pennsylvania Marketable Day-Trip Travelers

Base: Marketable Day-Trips

Percent of Total

- Pennsylvania: 44%
- New Jersey: 14%
- New York: 12%
- Ohio: 8%
- Maryland: 7%
- Delaware: 2%
- West Virginia: 2%
- Virginia: 2%
Urban Origin Markets for Pennsylvania Marketable Day-Trip Travelers

Base: Marketable Day-Trips

In-State DMA’s

- Philadelphia 19%
- Pittsburgh 10%
- Wilkes Barre-Scranton 8%
- Harrisburg-Lancaster-Lebanon-York 7%
- Johnstown-Altoona 4%
- Erie 2%

Out-of-State DMA’s

- New York, NY 18%
- Washington, DC 5%
- Cleveland, OH 5%
- Baltimore, MD 4%
- Buffalo, NY 2%
- Youngstown, OH 2%
Traveler Profile — Marketable Day-Trips
Gender

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>44</td>
<td>45</td>
</tr>
<tr>
<td>Female</td>
<td>56</td>
<td>55</td>
</tr>
</tbody>
</table>
Age

Age in Years

18 - 24
12
13

25 - 34
18
21

35 - 44
20
20

45 - 54
19
22

55 - 64
13
13

65+
15
14

Percent of Total

Median Age
Pennsylvania
44.9

U.S. Average
43.0

Pennsylvania
U.S. Average

Base: Marketable Day-Trips
Race

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Race</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>85</td>
</tr>
<tr>
<td>African-American</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
</tr>
</tbody>
</table>

Pennsylvania: 85%
US Average: 83%

205
Hispanic Background

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>93</td>
<td>91</td>
</tr>
<tr>
<td>Yes</td>
<td>7</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Marital Status

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/With partner</td>
<td>62</td>
<td>62</td>
</tr>
<tr>
<td>Never married</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Divorced/Widowed/Separated</td>
<td>14</td>
<td>14</td>
</tr>
</tbody>
</table>
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>19</td>
<td>18</td>
</tr>
<tr>
<td>2 members</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>3 members</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>4+ members</td>
<td>29</td>
<td>29</td>
</tr>
</tbody>
</table>

Average Household Size: Pennsylvania 2.8 U.S. Average 2.8
Children in Household

Percent of Total

- No Children Under 18 Years of Age: Pennsylvania 52%, US Average 50%
- At Least One Child Between 13-17 Years of Age: Pennsylvania 22%, US Average 22%
- At Least One Child Between 6-12 Years of Age: Pennsylvania 23%, US Average 25%
- At Least One Child Under 6 Years of Age: Pennsylvania 18%, US Average 20%

Base: Marketable Day-Trips
Education

Percent of Total

- Post-graduate: Pennsylvania 18%, US Average 18%
- College graduate: Pennsylvania 37%, US Average 39%
- Some college: Pennsylvania 25%, US Average 26%
- High school or less: Pennsylvania 19%, US Average 16%
- Other: Pennsylvania 1%, US Average 1%

Base: Marketable Day-Trips
Employment

![Bar chart showing percent of total employment in Pennsylvania compared to US average.](chart.png)

- **Full time/self-employed**: 48% (Pennsylvania) vs. 49% (US Average)
- **Part time**: 11% (Pennsylvania) vs. 10% (US Average)
- **Not employed/retired/other**: 41% (Pennsylvania) vs. 41% (US Average)

Base: Marketable Day-Trips
Income

Percent of Total

- $150,000 and over: 4%
- $100,000-$149,999: 15%
- $75,000-$99,999: 14%
- $50,000-$74,999: 23%
- $30,000-$49,999: 20%
- Under $30,000: 22%

Base: Marketable Day-Trips

Pennsylvania vs 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: 40% (2015), 39% (2014)
- Live nearby: 38% (2015), 35% (2014)
- Recommendation from friend: 13% (2015), 14% (2014)
- Saw/heard advertisement: 5% (2015), 5% (2014)
- Read an article/Heard a news story: 4% (2015), 4% (2014)
- Read a recommendation on social media: 2% (2015), 1% (2014)
Planning Cycle

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Planning Cycle</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same day</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>2 weeks</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>3 weeks</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>1 Month or More</td>
<td>22</td>
<td>24</td>
</tr>
</tbody>
</table>
Information Sources Used for Planning (cont’d)

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>Percent of Total</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Tourism Office</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Local Visitors Bureaus/CoC</td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>A Toll-Free Number</td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Hotel/Resort</td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Association/Club</td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Blogs</td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Electronic Newsletter</td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Travel Agent</td>
<td></td>
<td>&lt;1</td>
<td>2</td>
</tr>
</tbody>
</table>
Use of Pennsylvania Trip Planning Tools

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Tool</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Pennsylvania Travel Guide</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Blog about Pennsylvania</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>Pennsylvania Facebook Page</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>PURSUITS Magazine</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Pennsylvania Twitter Page</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>
www.visitpa.com Usefulness

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>26</td>
<td>26</td>
<td>74</td>
</tr>
<tr>
<td>2014</td>
<td>2</td>
<td>22</td>
<td>76</td>
</tr>
<tr>
<td>2013</td>
<td>2</td>
<td>14</td>
<td>84</td>
</tr>
</tbody>
</table>

*Caution: small sample size*
Travel Guide Usefulness

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>4</td>
<td>32</td>
<td>65</td>
</tr>
<tr>
<td>2014</td>
<td>6</td>
<td>30</td>
<td>64</td>
</tr>
<tr>
<td>2013</td>
<td>3</td>
<td>38</td>
<td>59</td>
</tr>
</tbody>
</table>

*Caution: small sample size
Trip Elements Planned Using Internet

Base: Marketable Day-Trips

Percent of Total

- **Car Route/Locations/Map**
  - 2015: 26%
  - 2014: 28%

- **Local Activities/Attractions/Things to See and Do**
  - 2015: 24%
  - 2014: 27%

- **Restaurants**
  - 2015: 12%
  - 2014: 15%

- **Accommodation**
  - 2015: 7%
  - 2014: 7%

- **Flight/Train/Bus/Rental Car**
  - 2015: 5%
  - 2014: 4%

- **Packages Tours/Cruises**
  - 2015: 1%
  - 2014: 4%
Reasons for Visiting www.visitpa.com

To Help Me Decide Which Pennsylvania Destination to Visit
- **Percent of Total**: 43%
- **Base**: Marketable Day-Trips

To Obtain More Information After I Decided to Visit
- **Percent of Total**: 22%

To Learn More About Pennsylvania
- **Percent of Total**: 21%

To Help Me Decide to Visit Pennsylvania
- **Percent of Total**: 15%

*2014 vs. 2015*
www.visitpa.com Influence on Planning

Base: Marketable Day-Trips

2015
- No Influence: 6%
- Very Little Influence: 27%
- Some Influence: 46%
- Large Influence: 22%

2014
- No Influence: 5%
- Very Little Influence: 24%
- Some Influence: 49%
- Large Influence: 22%

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

Legend:
- Red: No Influence
- Green: Very Little Influence
- Yellow: Some Influence
- Blue: Large Influence
www.visitpa.com Influence on Visitation

Base: Marketable Day-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>2015</td>
<td>5</td>
<td>16</td>
<td>51</td>
<td>28</td>
</tr>
<tr>
<td>2014</td>
<td>6</td>
<td>21</td>
<td>46</td>
<td>26</td>
</tr>
<tr>
<td>2013</td>
<td>8</td>
<td>14</td>
<td>49</td>
<td>29</td>
</tr>
</tbody>
</table>

Percent
Technology Used by Travelers

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Technology</th>
<th>Planning the trip</th>
<th>During the trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop computer</td>
<td>9</td>
<td>37</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>3</td>
<td>32</td>
</tr>
<tr>
<td>Smartphone</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>11</td>
<td>12</td>
</tr>
</tbody>
</table>
Planning Considerations Beyond Cost

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Planning Consideration</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I Wanted to See and Experience</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Activities I Wanted To Do</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Performance/Event/Occasion I Wanted to Attend</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Near-By Destination</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Visit Family/Friends</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Cost Was the Only Consideration</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Looking For a Certain Type of Vacation Experience</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Percent Who Booked In Advance

Base: Marketable Day-Trips

Percent of Total

- 2014: 50%
- 2015: 49%
Booking Cycle

Base: Marketable Day-Trips Booked in Advance

Percent of Total

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same day</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>23</td>
<td>21</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>2 weeks</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>3 weeks</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>More than 1 month in advance</td>
<td>23</td>
<td>25</td>
</tr>
</tbody>
</table>
Use of Vacation Packages and Group Travel

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Type</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td>14</td>
<td>17</td>
</tr>
</tbody>
</table>

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

Base: Marketable Day-Trips

Percent of Total

- Under 100 Miles: 65% (2015), 67% (2014)
- 100-149 Miles: 19% (2015), 21% (2014)
- 150-199 Miles: 10% (2015), 8% (2014)
- Over 200 Miles: 6% (2015), 4% (2014)
Size of Travel Party

Base: Marketable Day-Trips

Average No. of People on Day-Trip

<table>
<thead>
<tr>
<th>Year</th>
<th>Adults</th>
<th>Children under 18</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2.3</td>
<td>0.8</td>
<td>3.1</td>
</tr>
<tr>
<td>2014</td>
<td>2.3</td>
<td>0.7</td>
<td>3.0</td>
</tr>
</tbody>
</table>

Total = 3.1

Total = 3.0
Composition of Travel Party

Base: Marketable Day-Trips

Percent of Total

- **Spouse/Partner**: 57% (2015) vs. 58% (2014)
- **Child(ren)**: 29% (2015) vs. 30% (2014)
- **Friend(s)**: 16% (2015) vs. 20% (2014)
- **Just Myself**: 15% (2015) vs. 12% (2014)
- **Other Relative(s)**: 12% (2015) vs. 10% (2014)
- **Parent(s)**: 11% (2015) vs. 10% (2014)
- **Grandparents**: 1% (2015) vs. 2% (2014)
Trip Experiences — Marketable Day-Trips
Things Seen and Experienced on Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Outlet Shopping: 15% (2015), 15% (2014)
- Other Shopping: 14% (2015), 15% (2014)
- Scenic Drive: 13% (2015), 14% (2014)
- Historical House Museum: 12% (2015), 12% (2014)
- State/National Park: 9% (2015), 7% (2014)
- Zoo: 7% (2015), 7% (2014)
- Art Museum/Exhibit: 6% (2015), 7% (2014)
- Unique Shopping: 6% (2015), 9% (2014)
- Other Historical Sites: 5% (2015), 9% (2014)
Things Seen and Experienced on Pennsylvania Day-Trip (cont’d)

Base: Marketable Day-Trips

Percent of Total

- Local artist: 2015 - 5, 2014 - 4
- Civil war site: 2015 - 2, 2014 - 5
- Other museums: 2015 - 2, 2014 - 5
- Revolutionary war site: 2015 - 2, 2014 - 3
- Historical Re-enactments: 2015 - 2, 2014 - 2
- Caves: 2015 - 1, 2014 - 1

2015
2014
Dining/Entertainment

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent of Total 2015</th>
<th>Percent of Total 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casino/Racetrack</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Unique Local Foods</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>Fair/Exhibition/Festival</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Bar/Disco/Nightclub</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Nightlife</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Upscale Restaurants</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Local Music</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Other Live Performance</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Jazz/Rock Concert</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Professional Theater</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Dance Performance</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Auto Show</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Base: Marketable Day-Trips
Trip Benefits — Marketable Day-Trips
Benefits From Pennsylvania Day-Trip

- Relaxed and relieved stress: 56% (2015) vs. 56% (2014)
- A break from the day-to-day environment: 54% (2015) vs. 53% (2014)
- Enjoyed life with no fixed schedule: 30% (2015) vs. 29% (2014)
- Created lasting memories: 28% (2015) vs. 26% (2014)
- Got to visit a place I've never seen: 17% (2015) vs. 19% (2014)
- Arrived home with great stories to share: 13% (2015) vs. 16% (2014)
- Improved family ties: 13% (2015) vs. 13% (2014)
- Got to try new things: 13% (2015) vs. 15% (2014)

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

Base: Marketable Day-Trips

Percent of Total

- Enhanced knowledge of history: 11% (2015), 10% (2014)
- Renewed personal connections: 9% (2015), 10% (2014)
- Better outlook on life: 7% (2015), 8% (2014)
- Was physically challenged and energized: 7% (2015), 6% (2014)
- Was intellectually challenged and energized: 5% (2015), 4% (2014)
- Was pampered: 3% (2015), 2% (2014)
- Gained new skill(s): 2% (2015), 1% (2014)