Pennsylvania’s Annual Traveler Profile
2012 Travel Year

August 2013
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2012 OVERVIEW

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

• In 2012, Pennsylvania hosted an estimated 189.2 million visitors (as measured in person-trips) – a 4% increase from 2011. The increase in visitor volume was almost totally derived from the “marketable” segment, namely those travelers who visit a destination for purely leisure purposes (i.e., non-business) and whose stay can be influenced by marketing (e.g., travel to a destination for purposes other than visiting friends and family).

• The increase in marketable travelers was from both the overnight and day-trip segments, clearly showing that consumers are feeling more confident about their personal financial situation and willing to once again spend a portion of their discretionary dollars on travel.
The research for this report was conducted by Longwoods International.

The results consist of:

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

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

For the 2012 travel year, this produced 223,271 trips for analysis nationally – 148,056 for the overnight segment and 75,215 for day trips.
The Travel USA® program identified 5,513 survey respondents who visited Pennsylvania on an overnight trip in 2012 and 4,606 on a day-trip.

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

There were 1,253 total responses for the overnight segment and 779 total responses for the day-trip segment from this return sample.

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

PENNSYLVANIA VISITOR VOLUME

Pennsylvania hosted an estimated 189.2 million travelers in 2012 (as measured in “person-trips”), a 4.1% increase from 2011.

- More than a third of travelers (65 million) included an overnight stay, a 1.2% increase from 2011.
  - Visiting friends/relatives (VFR) remained the primary reason for an overnight stay in PA accounting for 48% of the overnight total (well above the 44% US average).
  - Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second leading category accounting for 40% of PA’s overnight travel, or an estimated 26 million travelers – a 17% increase from 2011.
  - PA experienced a clear shift away from VFR travel to marketable travel in 2012. The share of marketable overnight travel rose 5 percentage points from 2011, as illustrated in the graph on the following slide. In contrast, the US average share of VFR travel was unchanged from 2011 at 44%, while marketable overnight rose 2 percentage points to 42% due to a shift in the proportion of business travel.
Executive Summary

Main Purpose of Trip for Pennsylvania Overnight Travel 2011 and 2012

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>51%</td>
<td>48%</td>
</tr>
<tr>
<td>Marketable</td>
<td>35%</td>
<td>40%</td>
</tr>
<tr>
<td>Business</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Business-Leisure</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Pennsylvania hosted an estimated 124.2 million day-trip travelers in 2012 – a 5.7% increase from 2011.

- Marketable trips accounted for 55% of PA’s day-trip travel, or an estimated 68 million travelers, a proportion exceeding the US average of 52% and the state average for overnight travel (40%).
- Visiting friends/relatives (VFR) was the second leading reason for a PA day-trip in 2012, accounting for 34% of the day-trip total (unchanged from 2011) and slightly below the 37% US average and well below the state average for overnight travel (48%).
- Business trips and Business-Leisure accounted for 8% and 3%, respectively, of PA’s 2012 day-trip total.
- When compared with 2011, the relative distribution of PA’s major day-trip travel types was essentially unchanged.
ORIGIN MARKETS

- Pennsylvania, New York, New Jersey, Ohio, and Maryland remained the top five origin states for Pennsylvania marketable overnight and day-trip travelers in 2012, together accounting for 78% and 87%, respectively, of the total.

- Pennsylvania was the top origin market for PA’s leisure travelers accounting for 36% of marketable overnight travelers; 49% of marketable day-trip travelers; 34% of overnight VFR travelers; and 47% of the state’s day-trip VFR travelers.

- Pennsylvania was also the top origin state for PA business overnight travelers accounting for 30% of the state total, with New York, Ohio, New Jersey, and Maryland, together accounting for an additional 33% of PA’s overnight business travelers.

- New York continued to be an important origin market for business travelers combining leisure travel with a business trip, accounting for 18% of PA’s overnight business-leisure travel segment – second only to Pennsylvania (23%).
Executive Summary (cont’d)

PENNSYLVANIA REGIONS

- Philadelphia and The Countryside region had the highest total overnight visitation numbers of the state’s 11 tourism regions, with 14.4 million person-trips in 2012, followed by Pittsburgh and Its Countryside and Dutch Country Roads regions.

- These three regions accounted for 57% of Pennsylvania’s total overnight person-trips in 2012.

- The Dutch Country Roads and Pocono Mountains regions were essentially tied as the state’s leading region for marketable overnight leisure trips in 2012, followed by the Philadelphia and The Countryside and Pittsburgh and Its Countryside regions.

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

Nearly half (47%) of Pennsylvania’s overnight marketable visitors traveled to/within the state because they had visited before and wanted to see more in 2012 – down from 62% the prior year.

A recommendation from friends/relatives was responsible for 17% of the state’s overnight marketable visitors in 2012 – up 4 percentage points from 2011. When viewed together with the large percentage of travelers who had visited Pennsylvania before and wanted to see more, the importance of cultivating a positive image and experience for travelers cannot be overstated.

Living nearby was essentially tied with personal recommendation as the main reason to visit Pennsylvania in 2012 – cited by 17% of survey respondents.

Advertising influenced 8% of marketable overnight travelers’ decision to visit Pennsylvania in 2012, the same proportion who were influenced by a tourism article or news story they heard or read.
Planning and Booking by Marketable Overnight Travelers

The planning cycle for today’s time-pressed travel consumers is relatively short with slightly more than half of Pennsylvania’s marketable overnight travelers planning their trip in a month or less (31%) or within two months (21%) in 2012.

The internet is the single most important planning source – used by 50% of Pennsylvania’s marketable overnight travelers in 2012, with books and personal experience tying for second with each used by 17% of travelers.

Nearly half of Pennsylvania’s marketable overnight travelers used the internet to research and plan their accommodations (48%), while more than a third relied on the internet for maps or directions (37%), close to 30% to find out about local attractions and activities (29%), and a quarter for information on restaurants (24%) in 2012.

In terms of the technology used, more than half used a desktop computer (56%) or laptop (48%) in planning their PA trip. While 20% used a smartphone to plan their trip, usage soared to 46% during the trip.
Use of Social Media by Pennsylvania’s Marketable Overnight Travelers

Approximately 70% of Pennsylvania’s marketable overnight leisure travelers used social media in some capacity in 2012 – just below the 72% nationwide average.

Not surprisingly, PA travelers in the younger age groups are far more likely to use social media before, during, and after their trips than older travelers, i.e., 84% of travelers below the age of 35 compared to just 33% of those 65 year of age or older.

Posting travel photos and/or videos online was the most common social media activity of PA’s marketable overnight leisure travelers below the age of 45 in 2012, while reading online travel reviews was the most common social media activity of travelers 45 years of age or older, including those in the 65+ age group.
Trip Experiences

Scenic drives, shopping, and visiting historical houses/museums remained the top three trip experiences of Pennsylvania’s marketable overnight travelers in 2012.

With the exception of visits to zoos, participation rates for most types of trip experiences by Pennsylvania’s marketable overnight travelers in 2012 were little changed from 2011, with the proportion of travelers visiting zoos up 6 percentage points to 13%.

The participation rates for Pennsylvania’s marketable day-trip travelers were generally below those of the overnight segment in 2012, although there were strong increases for a number of activities, most notably non-outlet shopping, farmers markets, historic houses/museums, and art-related experiences.
Executive Summary (cont’d)

Trip Characteristics

Pennsylvania is largely a “drive-to” destination, with the vast majority of the state’s marketable overnight travelers from out of state arriving by car, van, truck, or RV in 2012.

Short stays were the norm for the majority of marketable overnight travelers with 60% staying just one or two nights on their Pennsylvania trip in 2012 – a far higher percentage than the 54% US average. However, there was a 4 percentage point increase in the proportion of PA travelers staying for 3-6 days to 31%.

Pennsylvania’s marketable overnight travelers largely preferred to stay in hotels or motels (56%), with 7% opting for a rented campground in 2012.

As in prior years, two-thirds of the state’s marketable overnight leisure visitors traveled with a spouse or partner, while well over a third (39%) had children along on their trip.
Traveler Priorities and Expectations

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

For Pennsylvania’s marketable overnight leisure travelers, their top priorities for a travel destination in 2012 were (in descending order): exciting, adult atmosphere, family friendly, worry free, climate, sightseeing opportunities, luxurious, affordable, unique, the entertainment, and sports and recreation.

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

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

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

As in the previous two years, the benefits of travel for PA’s marketable overnight and day-trip leisure visitors largely reflect a break from people’s day-to-day responsibilities and stress and provide a time to create lasting memories with those who are most important to them, namely family and friends.

The top five trip benefits cited by Pennsylvania’s 2012 marketable overnight and day-trip travelers were: relaxed/relieved stress, a break from the day-to-day routine, no fixed schedule, an opportunity to create lasting memories, and enrich relationships.

Visiting a place never seen before ranked just out of the top five benefits of travel, cited by nearly a quarter of survey respondents – a 7 percentage point increase from 2011.
DEMOGRAPHIC PROFILE OF MARKETABLE OVERNIGHT TRAVELERS

As in prior years, Pennsylvania’s 2012 marketable overnight travelers were generally higher income, well-educated, married adults.

- Pennsylvania’s marketable overnight travelers had a median age of 41.7 years, slightly above the US median of 40.4 years of age, and below the median age of the state’s marketable day-trip travelers (44.9 years).
- The majority were married or with a partner (64%) – slightly above the US average of 61% and that of marketable day-trip travelers (62%) in 2012.
- A majority of travelers (54%) had children under 18 years of age living at home – a proportion well above that of the state’s marketable day-trip travelers (46%).
- The median household income of the state’s marketable overnight travelers was $65,420, with close to a quarter (24%) with an annual household income of at least $100,000. The median household income of the state’s marketable day-trip travelers was lower than the state’s overnight travel segment at $59,650.
DEMOGRAPHIC CHARACTERISTICS BY AGE OF TRAVELER

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

- Pennsylvania’s marketable overnight travelers under the age of 45 were more likely to hold at least a bachelor’s degree or higher than those 45-64 years of age, i.e., 48% vs 40%, respectively.
- The proportion of travelers with children under 18 years of age differed markedly based on the age of the traveler:

<table>
<thead>
<tr>
<th>Traveler’s Age</th>
<th>Percent With Children Under Age 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>54%</td>
</tr>
<tr>
<td>25-34</td>
<td>65%</td>
</tr>
<tr>
<td>35-44</td>
<td>77%</td>
</tr>
<tr>
<td>45-54</td>
<td>60%</td>
</tr>
<tr>
<td>55-64</td>
<td>22%</td>
</tr>
<tr>
<td>65+</td>
<td>9%</td>
</tr>
</tbody>
</table>
Executive Summary (cont’d)

Marital Status by Age

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

- Pennsylvania’s marketable overnight travelers in the youngest age group (18-24) were overwhelmingly single (76%).
- There was a distinct shift to married or with partner (60%) for the 25-34 age group, but with roughly a third still reporting as single.
- The vast majority of the state’s marketable overnight travelers in the 45-54 and 55-64 age ranges were married/living with a partner (above 70% for each group).
- While the overwhelming majority of travelers in the 65+ age group were married or living with a partner (70%), not surprisingly they had the highest proportion that were widowed.
Detailed Findings
Size & Structure of US Overnight Travel Market
Size and Structure of the US Domestic Travel Market

- Overnight travel by Americans increased by 3% in 2012 vs. 2011.
- Of the almost 1.5 billion trips taken, 80% were adults and 86% were taken for leisure purposes.
- Approximately half of the leisure trips were for the purpose of visiting friends and relatives, approximately 4% were business leisure trips and about 43% were of a trip type that can be influenced by marketing.
- The top six marketable trip types were touring trips, special event travel, outdoor trips, casino trips, city trips and resort trips.
Size of the US Overnight Travel Market
2010 to 2012

Base: Total Overnight Trips

In millions of Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1,367</td>
</tr>
<tr>
<td>2011</td>
<td>1,413</td>
</tr>
<tr>
<td>2012</td>
<td>1,451</td>
</tr>
</tbody>
</table>

+3 % for each year compared to the previous year.
Structure of the US Overnight Travel Market — Trends

Base: Overnight Trips

Percent of Total

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

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

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

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

Base: Adult Overnight Trips

- Marketable Leisure: 42%
- Visits to Friends/Relatives: 44%
- Business: 10%
- Business-Leisure: 4%
Main Purpose of US Overnight Trips in 2012

Base: Adult Overnight Trips

Marketable Trips

- Visiting friends/relatives: 44%
- Touring: 15%
- Special event: 15%
- Outdoors: 13%
- Casino: 13%
- City trip: 12%
- Resort: 9%
- Theme park: 9%
- Cruise: 4%
- Golf Trip: 2%
- Ski/Snowboarding: 1%
- Other business trip: 6%
- Business-Leisure: 4%
Size & Structure of Pennsylvania’s Travel Market
An estimated 189.2 million trips were taken to and/or within Pennsylvania by US residents in 2012:

34% were overnight trips and 66% were day trips

Of the 65 million overnight trips:

- 40% were marketable trip types (trips that can be influenced by marketing, i.e., leisure trips excluding visits to friends and relatives.)
- Key marketable trip types for Pennsylvania include touring, special events, and outdoors.
Pennsylvania Day-Trip Travelers

- Of Pennsylvania’s estimated 124.2 million day-trip travelers:
  - 55% were marketable trip types (a much higher percentage than for overnight travel).
- Key marketable day-trip types include touring, special events, and shopping.
Total Trips to Pennsylvania in 2012

Total Person-Trips = 189.2 Million

- Day Trips: 124.2 Million (66%)
- Overnight Trips: 65 Million (34%)

34%

66%
Pennsylvania’s Overnight Trip Market Segments

Base: Adult Overnight Trips to Pennsylvania

- Marketable Leisure: 40%
- Visits to Friends/Relatives: 48%
- Business: 8%
- Business-Leisure: 4%
Pennsylvania’s Leisure Overnight Market Segments by Age of Adult Traveler

Base: Adult Overnight Trips to Pennsylvania

- Marketable Leisure
- Visiting Friends/Relatives

<table>
<thead>
<tr>
<th>Age of Adult Traveler</th>
<th>Marketable Leisure</th>
<th>Visiting Friends/Relatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>40%</td>
<td>50%</td>
</tr>
<tr>
<td>25-34</td>
<td>39%</td>
<td>50%</td>
</tr>
<tr>
<td>35-44</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>45-54</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>55-64</td>
<td>35%</td>
<td>53%</td>
</tr>
<tr>
<td>65 or older</td>
<td>37%</td>
<td>51%</td>
</tr>
</tbody>
</table>
Pennsylvania’s Overnight Trip Market Segments by Presence of Children in Household

Base: Adult Overnight Trips to Pennsylvania

- **Any Children**
- **No Children Under 18 Years of Age**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Any Children</th>
<th>No Children Under 18 Years of Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting Friends/Relatives</td>
<td>45%</td>
<td>51%</td>
</tr>
<tr>
<td>Marketable Leisure</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Business</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Business-Leisure</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Special Event Trip

Base: Adult Overnight Trips to Pennsylvania

Percent of Total

Yes 48

No 52
Special Event Trip

Base: Adult Overnight Trips to Pennsylvania

- Holiday (e.g., 4th of July, Thanksgiving, etc.): 27%
- Birthday: 15%
- Wedding: 14%
- A fair or festival: 11%
- Class or family reunion: 11%
- Anniversary: 7%
- Professional or college sporting event: 7%
- Concert/play: 7%
- School graduation: 6%
- Funeral: 4%
- Business event/convention: 3%
- A race: 2%
- Other: 16%
Regions Visited on Overnight Trips*

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

Base: Adult Day Trips to Pennsylvania

- Marketable Leisure: 55%
- Visiting Friends/Relatives: 34%
- Business-Leisure: 8%
- Business: 3%

Market segments breakdown based on day trips to Pennsylvania.
Main Purpose of Pennsylvania 2012 Day-Trips

Base: Adult Day Trips

Marketable Trips

- Visiting friends/relatives: 34%
- Touring: 12%
- Special event: 10%
- Shopping: 10%
- Casino: 6%
- Theme park: 5%
- City trip: 5%
- Outdoors: 5%
- Golf trip: 1%
- Resort: 1%
- Ski/Snowboarding: 1%
- Conference/convention: 2%
- Other business trip: 7%
- Business-leisure: 3%
Special Event Trip

Base: Adult Day-Trips to Pennsylvania

Yes: 45%
No: 55%
Special Event Trip

Base: Adult Day-Trips to Pennsylvania

- A fair or festival: 25%
- Holiday (e.g., 4th of July, Thanksgiving, etc.): 23%
- Birthday: 16%
- Class or family reunion: 13%
- Wedding: 13%
- Concert/play: 11%
- Professional or college sporting event: 8%
- Anniversary: 7%
- Business event/convention: 4%
- Funeral: 3%
- School graduation: 3%
- A race: 2%
- Other: 17%

Percent of Total
Special Event Trip

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>Holiday (e.g., 4th of July, Thanksgiving, etc.)</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>16</td>
</tr>
<tr>
<td>Birthday</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>Wedding</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>A fair or festival</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Class or family reunion</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>Anniversary</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Professional or college sporting event</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Concert/Play</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>School graduation</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Funeral</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Business event/convention</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A race</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
The graph below illustrates the differences in the purpose of stay between PA’s overnight and day-trip travelers in 2012, with day-trip travelers far more likely to travel for “marketable” leisure purposes, while overnight travelers were more likely to visit friends/relatives.

- Visiting Friends/Relatives:
  - Overnight: 48%
  - Day-Trips: 34%

- Marketable:
  - Overnight: 40%
  - Day-Trips: 55%

- Business:
  - Overnight: 8%
  - Day-Trips: 8%

- Business-Leisure:
  - Overnight: 4%
  - Day-Trips: 3%
Regions Visited on Day-Trips*

<table>
<thead>
<tr>
<th>Region</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>25.4</td>
<td>25.6</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>17.9</td>
<td>16.2</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>17.1</td>
<td>16.7</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>15.9</td>
<td>15.5</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>12.2</td>
<td>10.8</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>12.0</td>
<td>9.3</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>10.5</td>
<td>8.3</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>9.6</td>
<td>7.6</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>7.2</td>
<td>5.4</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>7.0</td>
<td>5.4</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>6.5</td>
<td>4.2</td>
</tr>
</tbody>
</table>

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

Base: Marketable Overnight Trips

<table>
<thead>
<tr>
<th>State</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>36</td>
</tr>
<tr>
<td>New York</td>
<td>18</td>
</tr>
<tr>
<td>New Jersey</td>
<td>13</td>
</tr>
<tr>
<td>Ohio</td>
<td>5</td>
</tr>
<tr>
<td>Maryland</td>
<td>5</td>
</tr>
<tr>
<td>Virginia</td>
<td>3</td>
</tr>
<tr>
<td>Florida</td>
<td>2</td>
</tr>
<tr>
<td>West Virginia</td>
<td>2</td>
</tr>
<tr>
<td>California</td>
<td>2</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>2</td>
</tr>
</tbody>
</table>
Main Urban Markets for Pennsylvania’s Marketable Overnight Travelers

Base: Marketable Overnight Trips

In-State DMA’s

- Philadelphia, PA: 16%
- Pittsburgh, PA: 8%
- Wilkes Barre-Scranton, PA: 6%
- Harrisburg-Lncstr-Leb-York, PA: 5%
- Johnstown-Altoona, PA: 4%

Out-of-State DMA’s

- New York, NY: 22%
- Washington, DC: 4%
- Cleveland, OH: 3%
- Baltimore, MD: 3%
Main Origin States for Pennsylvania’s Business Overnight Travelers

Base: Business Overnight Trips

- Pennsylvania: 30
- New York: 15
- Ohio: 8
- New Jersey: 7
- Maryland: 5
- North Carolina: 4
- Florida: 4
- Virginia: 4
- Georgia: 3

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

Base: Business-Leisure Overnight Trips

- Pennsylvania: 23%
- New York: 18%
- California: 7%
- Florida: 6%
- Maryland: 6%
- New Jersey: 5%
- Virginia: 5%
- Ohio: 4%
- Delaware: 4%

Percent of Total
Pennsylvania Tourism Regions Visited by Origin Market
Pennsylvania Tourism Regions Visited by New York Residents

Base: Marketable Overnight Trips

The Pocono Mountains region was the most popular PA destination for marketable overnight travelers from New York state in 2012, followed by Dutch Country Roads.
Pennsylvania Tourism Regions Visited by New Jersey Residents

**Base: Marketable Overnight Trips**

The Pocono Mountains was the most popular PA destination for marketable overnight travelers from New Jersey in 2012, followed by the Philadelphia & the Countryside region.

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pocono Mountains</td>
<td>30</td>
</tr>
<tr>
<td>Philadelphia &amp; the Countryside</td>
<td>22</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>21</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>6</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>4</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>4</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>3</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>3</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>2</td>
</tr>
<tr>
<td>Laurel Highlands Region</td>
<td>2</td>
</tr>
<tr>
<td>Alleghenies &amp; Her Valleys</td>
<td>1</td>
</tr>
</tbody>
</table>
Pennsylvania Tourism Regions Visited by Ohio Residents

*Base: Marketable Overnight Trips*

*Pittsburgh & Its Countryside region was the most popular PA destination for marketable overnight travelers from Ohio in 2012, followed by Pennsylvania’s Great Lakes Region.*

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>32</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes Region</td>
<td>15</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>14</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>12</td>
</tr>
<tr>
<td>Laurel Highlands Region</td>
<td>8</td>
</tr>
<tr>
<td>Alleghenies &amp; Her Valleys</td>
<td>6</td>
</tr>
<tr>
<td>Philadelphia &amp; the Countryside</td>
<td>5</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>5</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>5</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>3</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>1</td>
</tr>
</tbody>
</table>
Pennsylvania Tourism Regions Visited by Maryland Residents

The Dutch Country Roads region was, by far, the most popular PA destination for marketable overnight travelers from Maryland in 2012.

- Dutch Country Roads: 33%
- Philadelphia & the Countryside: 19%
- Alleghenies & Her Valleys: 12%
- Pennsylvania Wilds: 8%
- Valleys of the Susquehanna: 7%
- Laurel Highlands Region: 7%
- Pittsburgh & Its Countryside: 6%
- Upstate PA: 4%
- Pocono Mountains: 4%
- Lehigh Valley: 4%
- Pennsylvania's Great Lakes Region: 3%
Traveler Profile — Overnight Marketable Trips
Gender

Base: Overnight Marketable Trips

Percent of Total

Male
Pennsylvania: 50
US Average: 51

Female
Pennsylvania: 50
US Average: 49
Base: Overnight Marketable Trips

### Percent of Total

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>25-34 years</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>35-44 years</td>
<td>21</td>
<td>22</td>
</tr>
<tr>
<td>45-54 years</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>55-64 years</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>65+</td>
<td>11</td>
<td>11</td>
</tr>
</tbody>
</table>

### Average Age

- **Pennsylvania**: 42.8
- **US**: 42.2
Race

Base: Overnight Marketable Trips

Percent of Total

- **White**: 86% (Pennsylvania) / 79% (US Average)
- **African-American**: 7% (Pennsylvania) / 10% (US Average)
- **Other**: 7% (Pennsylvania) / 11% (US Average)
Hispanic Background

Base: Overnight Marketable Trips

Percent of Total

Yes
- Pennsylvania: 7
- US Average: 11

No
- Pennsylvania: 93
- US Average: 89
Marital Status

Percent of Total

- Married/With partner: Pennsylvania 64%, US Average 61%
- Never married: Pennsylvania 25%, US Average 26%
- Divorced/Widowed/Separated: Pennsylvania 11%, US Average 12%
# Household Size

Base: Overnight Marketable Trips

## Percent of Total

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>2 members</td>
<td>31</td>
<td>32</td>
</tr>
<tr>
<td>3 members</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>4+ members</td>
<td>31</td>
<td>30</td>
</tr>
</tbody>
</table>

Average Household Size:

- **Pennsylvania**: 3.0
- **United States**: 3.0

---

65
Presence of Children in Household

Base: Overnight Marketable Trips

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

- No children under 18
  - Pennsylvania: 46
  - US Average: 49

- Any child between 13-17
  - Pennsylvania: 24
  - US Average: 24

- Any child between 6-12
  - Pennsylvania: 26
  - US Average: 27

- Any child under 6
  - Pennsylvania: 23
  - US Average: 20

Pennsylvania
US Average
Presence of Children in Household by Age of Adult Traveler

Base: Overnight Marketable Trips

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

- 18-24: Pennsylvania 54%, US Average 52%
- 25-34: Pennsylvania 65%, US Average 66%
- 35-44: Pennsylvania 77%, US Average 75%
- 45-54: Pennsylvania 53%, US Average 60%
- 55-64: Pennsylvania 22%, US Average 20%
- 65 or older: Pennsylvania 9%, US Average 8%
Education

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>College graduate</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Some college</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>High school or less</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Percent of Total
Employment

Base: Overnight Marketable Trips

Percent of Total

- Full time/ Self-Employed: 51% (Pennsylvania), 50% (US Average)
- Part time: 11% (Pennsylvania), 11% (US Average)
- Not employed/ Retired/Other: 38% (Pennsylvania), 39% (US Average)
Income

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $30K</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>$30K-$49.9K</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>17</td>
<td>22</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>$100K-$149.9K</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>$150K+</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>
Trip Planning & Booking

Pennsylvania Overnight
Marketable Trips
Main Reason for Choosing Pennsylvania

Base: Overnight Marketable Trips

Percent of Total

- Visited before and wanted to see more: 62 (2012), 47 (2011)
- Read an article/Heard a news story: 8 (2011), 8 (2012)
- Read a recommendation on social media: 3 (2012)
Planning Cycle

Base: Overnight Marketable Trips

Percent of Total

- 6 Months or More: 19% (2011), 20% (2012)
- 3-5 Months: 24% (2011), 27% (2012)
- 2 Months: 24% (2011), 21% (2012)
- 1 Month or Less: 33% (2011), 31% (2012)
Information Sources Used for Planning the Trip

Base: Overnight Marketable Trips

Percent of Total

- Online/Internet: 50% (2012), 43% (2011)
- Books: 17% (2012), 14% (2011)
- Personal experience: 17% (2012), 18% (2011)
- Travel guide: 14% (2012), 11% (2011)
- Auto club: 13% (2012), 11% (2011)
- Advice from friends/relatives: 11% (2012), 8% (2011)
- Hotel/resort: 11% (2012), 11% (2011)
- Social Media: 7% (2012), 7% (2011)
- Television: 3% (2012), 7% (2011)
Information Sources Used for Planning the Trip (cont’d)

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Information Source</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>State tourism office</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Magazines</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Radio</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Association/club</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Newspapers</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Electronic newsletter</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Local visitors bureaus/CoC</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Blogs</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Use of Pennsylvania Tourism Office Trip Planning Tools

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Tool</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania travel guide</td>
<td>29</td>
<td>16</td>
</tr>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>20</td>
<td>14</td>
</tr>
<tr>
<td>Pennsylvania Facebook page</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>Blog about Pennsylvania</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>PURSUITS magazine</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Pennsylvania Twitter page</td>
<td>9</td>
<td>5</td>
</tr>
</tbody>
</table>

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

Percent of Total 2012 2011

www.visitpa.com 2011 14 16
Pennsylvania Facebook page 2011 6 16
Blog about Pennsylvania 2011 9 14
PURSUITS magazine 2011 9 9
Pennsylvania Twitter page 2011 5 9
www.visitpa.com Usefulness

Base: Overnight Marketable Trips

2012

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

2011

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

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

Percent
Pennsylvania Travel Guide Usefulness

Base: Overnight Marketable Trips

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

Percent

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Very Useful</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>44</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>1</td>
<td>33</td>
<td>65</td>
</tr>
</tbody>
</table>
Websites Used for Planning Pennsylvania Trip

Base: Overnight Marketable Trips

Percent of Total

- Hotel websites: 2012 - 29%, 2011 - 26%
- www.visitpa.com: 2012 - 27%, 2011 - 20%
- Online booking engines: 2012 - 16%, 2011 - 10%
- Car rental websites: 2012 - 3%, 2011 - 1%
- Airline websites: 2012 - 2%, 2011 - 1%
Trip Elements Planned Using Internet

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Element</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>48</td>
<td>51</td>
</tr>
<tr>
<td>Car route/locations/map</td>
<td>37</td>
<td>32</td>
</tr>
<tr>
<td>Local activities/attractions/things to see and do</td>
<td>29</td>
<td>26</td>
</tr>
<tr>
<td>Restaurants</td>
<td>24</td>
<td>14</td>
</tr>
<tr>
<td>Flight/train/bus/rental car</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>Packages tours/cruises</td>
<td>6</td>
<td>4</td>
</tr>
</tbody>
</table>
Reasons for Visiting [www.visitpa.com]

Base: Overnight Marketable Trips

Percent of Total

- To obtain more information after I decided to visit: 2012 - 32%, 2011 - 45%
- To help me decide which Pennsylvania destination to visit: 2012 - 37%, 2011 - 43%
- To learn more about Pennsylvania: 2012 - 33%, 2011 - 38%
- To help me decide to visit Pennsylvania: 2012 - 24%, 2011 - 29%
www.visitpa.com Influence on Planning

Base: Overnight Marketable Trips

2012
- No Influence: 3%
- Very little Influence: 15%
- Some Influence: 51%
- Large Influence: 32%

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

Percent

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

Base: Overnight Marketable Trips

2012

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

2011

- No Influence: 13%
- Very little Influence: 66%
- Some Influence: 21%

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

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Channel</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet search</td>
<td>62</td>
<td>71</td>
</tr>
<tr>
<td>Family/friend(s)/colleague(s)</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Internet advertisement</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Magazine or newspaper article/programs</td>
<td>13</td>
<td>18</td>
</tr>
<tr>
<td>Travel brochure</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Pennsylvania travel guide</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Magazine or newspaper advertisement</td>
<td>14</td>
<td>18</td>
</tr>
<tr>
<td>Other advertisement (e.g., Radio, billboard, etc.)</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>Social Media (e.g. Facebook, Trip Advisor, etc.)</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
Technology Used by Travelers

Base: Overnight Marketable Trips

Percent of Total

- Desktop computer: 56%
- Laptop computer: 48%
- Tablet computer: 35%
- Smartphone: 25%

Planning the trip vs. During the trip

85
Social Media Used by Travelers

Base: Overnight Marketable Trips

Percent of Total

- Facebook: 76%
- Twitter: 25%
- LinkedIn: 15%
- Google +: 14%
- Pinterest: 12%
- Trip Advisor: 12%
- Foursquare: 4%
- Virtual Tourist: 2%
- Triplt: 2%
- Xanga: 2%
Planning Considerations Beyond Cost

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination I wanted to see and experience</td>
<td>34</td>
</tr>
<tr>
<td>Activities I wanted to do</td>
<td>15</td>
</tr>
<tr>
<td>Looking for a certain type of vacation experience</td>
<td>16</td>
</tr>
<tr>
<td>Performance/event/occasion I wanted to attend</td>
<td>13</td>
</tr>
<tr>
<td>Visit family/friends</td>
<td>5</td>
</tr>
<tr>
<td>Nearby destination</td>
<td>5</td>
</tr>
<tr>
<td>Cost was the only consideration</td>
<td>3</td>
</tr>
</tbody>
</table>

Comparing 2012 and 2011:

- Destination I wanted to see and experience: 34% (2012) vs 34% (2011)
- Activities I wanted to do: 15% (2012) vs 15% (2011)
- Looking for a certain type of vacation experience: 16% (2012) vs 17% (2011)
- Performance/event/occasion I wanted to attend: 13% (2012) vs 17% (2011)
- Visit family/friends: 5% (2012) vs 4% (2011)
- Nearby destination: 5% (2012) vs 4% (2011)
- Cost was the only consideration: 3% (2012) vs 3% (2011)
Percent of Travelers Booking In Advance

Base: Overnight Marketable Trips

Percent of Total

- 79% in 2011
- 85% in 2012

2011: yellow bar
2012: dark blue bar
Booking Cycle

Base: Overnight Marketable Trips

Percent of Total

- 6 Months or More: 9% (2011), 6% (2012)
- 3-5 Months: 18% (2011), 21% (2012)
- 1 Month or Less: 51% (2011), 44% (2012)
Use of Vacation Packages and Group Travel

Base: Overnight Marketable Trips

Percent of Total

- Pre-Paid Package
  - 2012: 20%
  - 2011: 9%

- Escorted Group Tour
  - 2012: 24%
  - 2011: 18%
Trip Characteristics of Pennsylvania’s Marketable Overnight Travelers
Distance Traveled to Pennsylvania

Percent of Total

Base: Overnight Marketable Trips

- Over 1,000 Miles: 2012 - 4, 2011 - 3
- 500-1,000 Miles: 2012 - 5, 2011 - 7
- 300-499 Miles: 2012 - 11, 2011 - 10
- 100-299 Miles: 2012 - 57, 2011 - 55
- 50-99 Miles: 2012 - 17, 2011 - 17
- Under 50 Miles: 2012 - 7, 2011 - 8
Transportation Used to Enter Pennsylvania

Base: Overnight Marketable Trips Starting Outside Pennsylvania

Percent of Total

Personal
- Own car: 82% (2012) 86% (2011)
- Rental car: 8% (2012) 7% (2011)
- Truck/Van/RV: 6% (2012) 6% (2011)

Commercial
- Plane: 5% (2012) 3% (2011)
- Bus: 4% (2012) 2% (2011)
- Shuttle van: 2% (2012) <1% (2011)
- Taxi: 2% (2012) 2% (2011)
- Train: 2% (2012) 3% (2011)

Personal

Commercial
Transportation Used Inside Pennsylvania

Base: Overnight Marketable Trips

Percent of Total

- Own car: 79% (2012), 84% (2011)
- Rental car: 9% (2012), 8% (2011)
- Truck/Van/RV: 4% (2012), 7% (2011)
- Bicycle/Motorcycle: 2% (2012), 1% (2011)
- Motor/sailboat: <1% (2012), 2% (2011)
- Bus: 5% (2012), 9% (2011)
- Train: 1% (2012), 6% (2011)
- Taxi: 1% (2012), 5% (2011)
- Plane: 4% (2012), 2% (2011)
- Shuttle van: 4% (2012), 4% (2011)
- Ferry/cruise ship/boat: 2% (2012), 2% (2011)

Personal

Commercial
Total Nights Away

Base: Overnight Marketable Trips

Percent of Total

- 1 Night: 2012 - 28%, 2011 - 31%
- 2 Nights: 2012 - 32%, 2011 - 33%
- 3-6 Nights: 2012 - 31%, 2011 - 27%
- 7+ Nights: 2012 - 8%, 2011 - 9%

Average Number of Nights

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3.1</td>
<td>3.1</td>
</tr>
</tbody>
</table>
Length of Stay

Base: Overnight Marketable Trips

2012
- Average Number of Nights: 2.7
- Pennsylvania*: 2.5
- Other Places: 0.2
- Total = 2.9

2011
- Average Number of Nights: 2.6
- Pennsylvania*: 2.3
- Other Places: 0.3
- Total = 2.9

* Those who spent 1 or more nights anywhere in Pennsylvania
Accommodations*

Base: Overnight Marketable Trips

Percent of Total

- Hotel: 49%
- Rented Campground/trailer park site: 7% (2012: 7%, 2011: 2%)
- Motel: 7% (2012: 7%, 2011: 2%)
- Wilderness Campsite: 6% (2012: 5%, 2011: 1%)
- Time Sharing Unit: 5% (2012: 5%, 2011: 1%)
- Friends/Relatives House/Cottage/Cabin: 6% (2012: 6%, 2011: 5%)
- Bed & Breakfast: 4% (2012: 3%, 2011: 4%)
- Country Inn/Lodge: 3% (2012: 3%, 2011: 3%)
- Other Rented House/Cottage/Cabin: 3% (2012: 3%, 2011: 1%)
- Other Accommodation: 3% (2012: 3%, 2011: 3%)
- Indoor water park: 2% (2012: 2%, 2011: 12%)
- State Park Lodge: <1% (2012: <1%, 2011: 2%)
- Rented Condominium: 1% (2012: 1%)

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

Base: Overnight Marketable Trips

Average No. of People

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

2011
- 2.2 Adults
- 0.6 Children under 18
Total = 2.8

Adults
Children under 18
Composition of Travel Party

Base: Overnight Marketable Trips

Percent of Total

- Spouse/Partner: 66% (2012), 66% (2011)
- Child(ren): 39% (2012), 38% (2011)
- Friend(s): 16% (2012), 16% (2011)
- Parent(s): 10% (2012), 9% (2011)
- Other Relative(s): 10% (2012), 8% (2011)
- Just Myself: 8% (2012), 12% (2011)
- Grandparents: 1% (2012), 2% (2011)
- Business Associates: <1% (2012), 1% (2011)
Trip Experiences — Overnight Marketable Trips
Things Seen and Experienced on Trip

Base: Overnight Marketable Trips

Percent of Total

- Scenic drive: 20% (2012), 17% (2011)
- Outlet shopping: 18% (2012), 17% (2011)
- Historic House/Museum: 14% (2012), 17% (2011)
- Other shopping: 13% (2012), 14% (2011)
- Zoo: 13% (2012), 7% (2011)
- State/national park: 11% (2012), 9% (2011)
- Other historical sites: 9% (2012), 7% (2011)
- Farmer's market: 9% (2012), 8% (2011)
- Art museum/exhibit: 7% (2012), 6% (2011)
- Historic house tour: 7% (2012), 3% (2011)
- Unique shopping: 5% (2012), 5% (2011)
- Civil war site: 7% (2012), 5% (2011)
Things Seen and Experienced on Trip (cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Other museums: 2012: 5, 2011: 6
- Aquarium: 2012: 1, 2011: 5
- Revolutionary war site: 2012: 4, 2011: 4
- Guided tour: 2012: 3, 2011: 4
- Historical re-enactments: 2012: 3, 2011: 4
- Birdwatching: 2012: 1, 2011: 4
- Underground railroad site: 2012: 1, 2011: 3
- Brewery: 2012: 3, 2011: 3
- Coal mine: 2012: <1, 2011: 2
- Botanical gardens: 2012: 1, 2011: 2
Dining/Entertainment

Base: Overnight Marketable Trips

Percent of Total

- Nightlife: 2012 - 11%, 2011 - 7%
- Casino/racetrack: 2012 - 11%, 2011 - 10%
- Bar/disco/nightclub: 2012 - 10%, 2011 - 6%
- Up-scale restaurants: 2012 - 9%, 2011 - 8%
- Unique local foods: 2012 - 10%, 2011 - 9%
- Fair/festival: 2012 - 7%, 2011 - 7%
- Other live performance: 2012 - 5%, 2011 - 5%
- Entertainment/shows: 2012 - 5%, 2011 - 2%
- Auto show: 2012 - 4%, 2011 - 2%
- Local music/theater: 2012 - 4%, 2011 - 3%
- Theater/dance/symphony/opera: 2012 - 3%, 2011 - 3%
- Jazz/rock concert: 2012 - 3%, 2011 - 2%
- Professional theater: 2012 - 2%, 2011 - 2%
- Dance performance: 2012 - 2%, 2011 - 1%
Sports and Recreation

Base: Overnight Marketable Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amusement/waterpark</td>
<td>22</td>
<td>17</td>
</tr>
<tr>
<td>Swim in a pool</td>
<td>13</td>
<td>7</td>
</tr>
<tr>
<td>Other outdoor sport/activity</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Hiking</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>Camping</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Professional/collegiate sports event</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Fishing</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Golfing</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Amateur sporting event</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>
Sports and Recreation (cont’d)

Base: Overnight Marketable Trips

Percent of Total

- Jogging/running: 2012 - 4, 2011 - 3
- Indoor fitness/yoga: 2012 - 4, 2011 - 1
- Swam in a lake/river: 2012 - 3, 2011 - 3
- Car race: 2012 - 3, 2011 - 1
- Beach at lake/river: 2012 - 2, 2011 - 3
- Powerboating/sailing: 2012 - 2, 2011 - 1
- Backpacking: 2012 - 2, 2011 - 1
- Snow skiing/snowboarding: 2012 - 2, 2011 - 1
Activities by Origin Market of Marketable Overnight Travelers
Pennsylvania has a distinct advantage over other US destinations in attracting NY travelers who are interested in theme parks, historic sites, and to a lesser extent, museums.
Pennsylvania has an advantage over other US destinations in attracting NJ travelers who are interested in historic sites, museums, theme parks, and national/state parks.

<table>
<thead>
<tr>
<th>Activity</th>
<th>To Pennsylvania</th>
<th>To All US Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>32</td>
<td>31</td>
</tr>
<tr>
<td>Fine dining</td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>Landmark/historic site</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Museum</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>Casino</td>
<td>25</td>
<td>16</td>
</tr>
<tr>
<td>Theme park</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>National/state park</td>
<td>13</td>
<td>10</td>
</tr>
<tr>
<td>Swimming</td>
<td>21</td>
<td>12</td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Theater</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Professional/college...</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Winery</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Skiing/snowboarding</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>
Pennsylvania has an advantage over other US destinations in attracting OH travelers who are interested in casinos, sports events, historic sites, and fair/exhibition/festivals.
Main Activities of Travelers from Maryland on Marketable Overnight Trips to Pennsylvania vs to All US Destinations

Pennsylvania has an advantage over other US destinations in attracting MD travelers who are interested in historic sites, theme parks, and sports events.

- Shopping: 34% to Pennsylvania, 38% to All US Destinations
- Landmark/historic site: 27% to Pennsylvania, 15% to All US Destinations
- Theme park: 23% to Pennsylvania, 15% to All US Destinations
- Swimming: 24% to Pennsylvania, 18% to All US Destinations
- Museum: 17% to Pennsylvania, 12% to All US Destinations
- Camping: 15% to Pennsylvania, 8% to All US Destinations
- National/state park: 14% to Pennsylvania, 13% to All US Destinations
- Fair/exhibition/festival: 13% to Pennsylvania, 7% to All US Destinations
- Fine dining: 11% to Pennsylvania, 7% to All US Destinations
- Spectator in an amateur event: 10% to Pennsylvania, 2% to All US Destinations
- Hiking/backpacking: 9% to Pennsylvania, 7% to All US Destinations
- Casino: 9% to Pennsylvania, 7% to All US Destinations
- Zoo: 8% to Pennsylvania, 4% to All US Destinations
- Bar/disco/nightclub: 13% to Pennsylvania, 7% to All US Destinations
- Dance: 7% to Pennsylvania, 6% to All US Destinations
Main Activities of Travelers from Pennsylvania on Marketable Overnight Trips to Pennsylvania vs to All US Destinations

Pennsylvania’s outdoor recreational opportunities are a big draw for the state’s resident travelers.
Travelers from Ohio are far more likely to visit a PA casino compared to travelers from other states, while travelers from New York and Maryland clearly prefer visiting PA’s theme parks and swimming activities.
Activities by Presence/Absence of Children in Travelers’ Households
Travelers with children are far more likely to visit a theme park or participate in outdoor activities, while those without children are more likely to visit fine dining, casino, sports event, and historic sites.
Regional Attractions Visited
2012 Marketable Overnight Trips
Pennsylvania Attractions/Events — Pennsylvania’s Great Lakes Region*

Base: Overnight Trips

Percent of Total

- City of Erie: 56%
- Presque Isle State Park: 19%
- Presque Isle Downs & Casino: 15%
- Erie Zoo & Botanical Gardens: 13%
- Historic House/Museum: 12%
- Splash Lagoon/Waldameer Water Parks: 12%
- Erie Art Museum: 10%
- Tom Ridge Environmental Center: 10%
- Lake Erie Speedway: 9%
- Covered Bridges: 8%
- Golf course: 7%
- Underground Railroad: 5%
- US Brig Niagara/Erie Maritime Museum: 5%
- Winery/Vineyard: 4%

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

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Attraction/Museum/Activity</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pymatuning State Park</td>
<td>7</td>
</tr>
<tr>
<td>Grove City Shopping Outlets</td>
<td>7</td>
</tr>
<tr>
<td>Cook Forest</td>
<td>6</td>
</tr>
<tr>
<td>Oil Creek State Park</td>
<td>5</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>4</td>
</tr>
<tr>
<td>Erie National Wildlife Refuge</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Oil Creek &amp; Titusville Railroad</td>
<td>3</td>
</tr>
<tr>
<td>Conneaut Lake</td>
<td>2</td>
</tr>
<tr>
<td>Golf course</td>
<td>2</td>
</tr>
<tr>
<td>Conneaut Lake Park</td>
<td>2</td>
</tr>
<tr>
<td>Oil City</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
</tbody>
</table>

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

**Base:** Overnight Marketable Trips

### Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Pittsburgh</td>
<td>33</td>
</tr>
<tr>
<td>Duquesne Incline</td>
<td>23</td>
</tr>
<tr>
<td>Professional Sports Game (Pittsburgh Steelers/Pirates/Penguins)</td>
<td>18</td>
</tr>
<tr>
<td>Pittsburgh Cultural District</td>
<td>18</td>
</tr>
<tr>
<td>Pittsburgh Zoo &amp; PPG Aquarium</td>
<td>15</td>
</tr>
<tr>
<td>Kennywood Amusement Park</td>
<td>15</td>
</tr>
<tr>
<td>Carnegie Museums</td>
<td>13</td>
</tr>
<tr>
<td>National Aviary</td>
<td>10</td>
</tr>
<tr>
<td>Fort Pitt Museum</td>
<td>10</td>
</tr>
<tr>
<td>Andy Warhol Museum</td>
<td>9</td>
</tr>
<tr>
<td>Historic House/Museum</td>
<td>8</td>
</tr>
<tr>
<td>Cathedral of Learning</td>
<td>8</td>
</tr>
<tr>
<td>Children’s Museum of Pittsburgh</td>
<td>7</td>
</tr>
<tr>
<td>Phipps Conservatory &amp; Gardens</td>
<td>6</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>5</td>
</tr>
<tr>
<td>Golf course</td>
<td>5</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>4</td>
</tr>
<tr>
<td>College Sports Event</td>
<td>4</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

- Bushy Run Battlefield: 7%
- Golf course: 4%
- Moraine State Park: 3%
- Amish Farms/Countryside: 3%

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

Base: Overnight Trips

Percent of Total

- Connellsville: 30%
- Fallingwater/Frank Lloyd Wright House: 22%
- Fort Necessity National Battlefield: 19%
- Idlewild Amusement Park: 18%
- Uniontown: 18%
- Seven Springs: 16%
- Fort Ligonier: 16%
- Bushy Run Battlefield: 15%
- Golf course: 14%
- Shanksville/Stony Creek/Flight 93 Memorial: 10%
- Nemacolin: 9%
- Ohiopyle/Ohiopyle State Park: 8%
- Underground Railroad: 8%
- Friendship Hill National Historic Site: 7%
- Historic House/Museum: 7%
- Meyersdale: 6%
- Winery/Vineyard: 5%
Pennsylvania Attractions/Events — Pennsylvania Wilds Region*

Base: Overnight Trips

Golf course 21%
Historic House/Museum 20%
Underground Railroad 12%
Peter J. McGovern Little League Museum 11%
Millionaires' Row (Historic Homes) 11%
Winery/Vineyard 9%
Piper Aviation Museum 9%
Little Pine State Park 8%
Little League World Series & Related Events 4%

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

Base: Overnight Trips

Percent of Total

- Allegheny National Forest: 9
- Cook Forest State Park: 6
- Black Moshannon State Park: 5
- Historic House/Museum: 5
- Pine Creek Gorge/Pennsylvania Grand Canyon: 4
- Bucktail State Park: 3
- American Golf Hall of Fame: 3
- Penn Brad Oil Museum: 3
- Clarion River: 3
- Kinzua State Park/Kinzua Bridge/Kinzua Dam: 3
- Pennsylvania Lumber Museum: 2
- Historic Curtin Village/Eagle Ironworks: 2
- Eldred World War II Museum & Learning Center: 2
- Cherry Springs/Dark Sky Preserve: 2
- Tionesta/Tionesta Lake: 2

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

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

Base: Overnight Trips

Percent of Total

- Penn State University: 29%
- Penn State All Sports Museum: 14%
- Covered Bridges: 10%
- American Philatelic Society: 10%
- Penn State Sports Event: 10%
- Historic Home/Museum: 8%
- Golf course: 8%
- Winery/Vineyard: 8%
- Toftrees Golf Resort: 7%
- Bellefonte Museum: 6%
- Underground Railroad: 6%
- Shavers Creek Environmental Center: 6%
- Pennsylvania Military Museum: 5%
- Tussey Mountain Ski Resort: 3%
- Central Pennsylvania Festival of the Arts: 3%

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

Base: Overnight Trips

Percent of Total

1. Historic Home/Museum: 10%
2. Winery/Vineyard: 9%
3. Blue Knob State Park: 8%
4. Old Bedford Village: 6%
5. Penn's Cave & Wildlife Park: 6%
6. Allegheny Portage Railroad National Historic Site: 6%
7. Indian Caverns/Lincoln Caverns: 6%
8. Raystown Lake: 6%
9. Underground Railroad: 6%
10. Johnstown Inclined Plane: 3%
11. Horseshoe Curve: 3%
12. Golf course: 3%

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

Base: Overnight Trips

Percent of Total

Endless Mountains Nature Center 13
Covered Bridges 12
Eagle's Mere Historic Village 11
Ricketts Glen State Park 10
Loyalsock State Forest 8
Center For Anti-Slavery Studies 8
Historic Home/Museum 6
Underground Railroad 5
Old Mill Village Museum 3
Winery/Vineyard 3
Pennsylvania Anthracite Coal Miners Memorial 2
Golf course 2

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

Mohegan Sun at Pocono Downs: 12%
Hickory Run State Park: 11%
Historic Home/Museum: 10%
Winery/Vineyard: 9%
Lackawanna Coal Mine Tour: 9%
Ricketts Glen State Park: 8%
Covered Bridges: 7%
Underground Railroad: 7%
Steamtown National Historic Site: 7%
The Downs at Hazleton: 5%
Pioneer Tunnel Coal Mine: 5%
PA Anthracite Coal Museum: 5%
Golf course: 5%
Houdini Tour & Museum: 4%

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

Base: Overnight Marketable Trips

Percent of Total

- Mount Airy Casino Resort: 16%
- Delaware Water Gap: 12%
- Bushkill Falls: 12%
- The Crossings Premium Outlets: 7%
- Winery/Vineyard: 6%
- Great Wolfe Lodge: 6%
- Golf course: 5%
- Pocono Raceway: 5%
- Camelback Waterpark: 5%
- Jim Thorpe: 5%
- Pocono Indian Museum: 4%
- Caesar’s Resort: 3%
- Covered Bridges: 3%
- Hickory Run State Park & Big Boulder Field: 3%
- Historic Home/Museum: 3%
- Upper Delaware Scenic & Recreation River: 3%
- Tobyhanna State Park: 3%
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gettysburg Battlefield/National Military Park</td>
<td>16</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>13</td>
</tr>
<tr>
<td>Gettysburg National Military Park &amp; Museum</td>
<td>11</td>
</tr>
<tr>
<td>Gettysburg Diorama</td>
<td>7</td>
</tr>
<tr>
<td>Outlet Malls at Gettysburg Village</td>
<td>7</td>
</tr>
<tr>
<td>General Lee's Headquarters</td>
<td>6</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>6</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>5</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>3</td>
</tr>
<tr>
<td>Hall of Presidents &amp; First Ladies</td>
<td>3</td>
</tr>
<tr>
<td>Land of Little Horses</td>
<td>3</td>
</tr>
<tr>
<td>Eisenhower National Historic Site</td>
<td>2</td>
</tr>
<tr>
<td>Golf course</td>
<td>2</td>
</tr>
</tbody>
</table>

*Gettysburg (Adams County); Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum have net attendance of 19%
Pennsylvania Attractions/Events — Dutch Country Roads Region*

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hersheypark</td>
<td>28</td>
</tr>
<tr>
<td>The Hershey Story, The Museum on Chocolate Avenue</td>
<td>13</td>
</tr>
<tr>
<td>Outlets at Hershey</td>
<td>8</td>
</tr>
<tr>
<td>Hershey Gardens</td>
<td>7</td>
</tr>
<tr>
<td>Indian Echo Caverns</td>
<td>4</td>
</tr>
<tr>
<td>The State Museum of Pennsylvania</td>
<td>4</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>3</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>3</td>
</tr>
<tr>
<td>Hershey Theater</td>
<td>2</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>2</td>
</tr>
<tr>
<td>Antique Auto Museum at Hershey</td>
<td>2</td>
</tr>
<tr>
<td>National Civil War Museum</td>
<td>2</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>2</td>
</tr>
<tr>
<td>Pennsylvania State Capitol</td>
<td>2</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

- Amish Farms/Countryside: 16%
- Outlet Mall (Rockvale, Tanger): 13%
- Covered Bridges: 13%
- Lancaster Central Market: 10%
- Strasburg Railroad/Traintown: 8%
- Winery/Vineyard: 6%
- Railroad Museum of Pennsylvania: 6%
- Historic Home/Museum: 5%
- Cherry Crest Adventure Farm: 4%
- National Toy Train Museum: 4%
- Golf course: 4%
- Historic Lancaster Walking Tour: 4%
- Landis Valley Museum: 3%
- Dutch Wonderland Family Amusement Park: 3%
- Underground Railroad: 2%
- Wheatland (President John Buchanan Home): 2%
- Ephrata Cloister: 2%
- Christiana Underground Railroad Center: 2%

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

Base: Overnight Marketable Trips

Percent of Total

- Utz Quality Foods Factory: 3
- Wolfgang Candy Company: 1
- Gifford Pinchot State Park: 1
- Harley-Davidson Factory: 1

*York Region
Pennsylvania Attractions/Events — Lehigh Valley Region*

Base: Overnight Trips

Percent of Total

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bethlehem Sands Casino Resort</td>
<td>38</td>
</tr>
<tr>
<td>Historic Home/Museum</td>
<td>22</td>
</tr>
<tr>
<td>Dorney Park &amp; Wildwater Kingdom</td>
<td>17</td>
</tr>
<tr>
<td>Crayola Factory</td>
<td>11</td>
</tr>
<tr>
<td>Bushkill Amusement Park</td>
<td>11</td>
</tr>
<tr>
<td>Underground Railroad</td>
<td>10</td>
</tr>
<tr>
<td>Covered Bridges</td>
<td>9</td>
</tr>
<tr>
<td>The Downs at Lehigh Valley</td>
<td>9</td>
</tr>
<tr>
<td>Museum of Indian Culture</td>
<td>8</td>
</tr>
<tr>
<td>Winery/Vineyard</td>
<td>7</td>
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<tr>
<td>National Museum of Industrial History</td>
<td>6</td>
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<tr>
<td>Golf course</td>
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<tr>
<td>Martin Guitars</td>
<td>3</td>
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<tr>
<td>National Canal Museum</td>
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<tr>
<td>Mack Trucks</td>
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</table>
Pennsylvania Attractions/Events — Philadelphia & The Countryside Region*

Base: Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Attraction/Museum</th>
<th>Percent of Total</th>
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<tbody>
<tr>
<td>Liberty Bell/Liberty Bell Center</td>
<td>23</td>
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<tr>
<td>Independence Hall/Independence Visitor Center</td>
<td>16</td>
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<tr>
<td>Historic Home/Museum</td>
<td>15</td>
</tr>
<tr>
<td>Philadelphia Zoo</td>
<td>14</td>
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<tr>
<td>Edgar Allan Poe National Historic Site</td>
<td>14</td>
</tr>
<tr>
<td>Philadelphia Museum of Art</td>
<td>13</td>
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<tr>
<td>Reading Terminal Market</td>
<td>13</td>
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<tr>
<td>Covered Bridges</td>
<td>10</td>
</tr>
<tr>
<td>The Franklin (institute)</td>
<td>10</td>
</tr>
<tr>
<td>Eastern State Penitentiary Historic Site</td>
<td>9</td>
</tr>
<tr>
<td>Philadelphia Premium Outlets</td>
<td>9</td>
</tr>
</tbody>
</table>

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

Base: Overnight Marketable Trips

Percent of Total

- Winery/Vineyard: 8%
- National Constitution Center: 7%
- US Mint: 7%
- Pennsylvania Academy of the Fine Arts: 5%
- Please Touch Museum: 5%
- Rodin Museum: 5%
- Golf course: 5%
- Academy of Natural Sciences: 4%
- Underground Railroad: 4%
- African American Museum in Philadelphia: 3%
- Independence Seaport Museum: 2%

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

Base: Overnight Marketable Trips

Percent of Total

- Brandywine River Museum: 3
- Hopewell Furnace National Historic Site: 2
- Covered Bridges: 2
- Brandywine Battlefield Park: 2
- Historic Home/Museum: 2

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

Base: Overnight Marketable Trips

Percent of Total

- Sesame Place: 2
- Valley Forge National Historic Park: 2
- Philadelphia Park Casino & Racetrack: 2

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Convenient access by car: 87 (2012), 62 (2011)
- Affordable attractions/events: 83 (2012), 54 (2011)
- Feeling safe at the destination: 77 (2012), 71 (2011)
- Lots of things for adults to see and do: 67 (2012), 48 (2011)
- Being at a place I’ve never seen before: 67 (2012), 42 (2011)
- Availability of mid-range accommodations: 63 (2012), 42 (2011)
- Availability of economy or budget accommodations: 60 (2012), 37 (2011)
- Having family or friends who live in the region: 58 (2012), 37 (2011)
- Unique or local food and cuisine: 57 (2012), 37 (2011)
- Lots of information about the destination on the…: 57 (2012), 34 (2011)
- Great shopping: 57 (2012), 36 (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of things for children to see and do: 54 (2012), 39 (2011)
- Within a two-to-four-hour drive from home: 52 (2012), 37 (2011)
- Lots of historic things to see or experience: 45 (2012), 30 (2011)
- Lots of cultural things to see or experience: 45 (2012), 31 (2011)
- Different or unique local artwork/craftwork: 43 (2012), 25 (2011)
- Availability of camping or RV facilities: 42 (2012), 28 (2011)
- Great opportunities for nature/eco-travel: 42 (2012), 29 (2011)
- Focus on “green travel”: 34 (2012), 27 (2011)

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

Base: Overnight Trips

<table>
<thead>
<tr>
<th>Factor</th>
<th>2012</th>
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<tbody>
<tr>
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<tr>
<td>Affordable attractions/events</td>
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<td>49</td>
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<tr>
<td>Lots of things for adults to see and do</td>
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<td>59</td>
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<tr>
<td>Unique or local food and cuisine</td>
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<td>52</td>
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<td>Availability of mid-range accommodations</td>
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<tr>
<td>Being at a place I’ve never seen before</td>
<td>52</td>
<td>48</td>
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<tr>
<td>A fun city environment</td>
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<tr>
<td>Availability of economy or budget accommodations</td>
<td>48</td>
<td>37</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>45</td>
<td>30</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>44</td>
<td>23</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Within a two-to-four-hour drive from home: 44%
- Great shopping: 43%
- Lots of historic things to see or experience: 42%
- A great rural/agricultural area: 41%
- Lots of information about the destination on the Internet: 40%
- Different or unique local artwork/craftwork: 39%
- Within a two-hour drive from home: 39%
- Availability of luxury accommodations: 39%
- Lots of things for children to see and do: 37%
- Great opportunities for nature/eco-travel: 32%
- Availability of camping or RV facilities: 28%
- Focus on “green travel”: 24%

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Convenient access by car: 75% (2012) vs 62% (2011)
- Feeling safe at the destination: 74% (2012) vs 71% (2011)
- Affordable attractions/events: 64% (2012) vs 73% (2011)
- Lots of things for adults to see and do: 64% (2012) vs 45% (2011)
- A great rural/agricultural area: 64% (2012) vs 37% (2011)
- Having family or friends who live in the region: 59% (2012) vs 54% (2011)
- Lots of things for children to see and do: 56% (2012) vs 28% (2011)
- Unique or local food and cuisine: 56% (2012) vs 35% (2011)
- Availability of mid-range accommodations: 56% (2012) vs 35% (2011)
- Within a two-to-four-hour drive from home: 53% (2012) vs 36% (2011)
- Availability of luxury accommodations: 52% (2012) vs 31% (2011)
- Availability of economy or budget accommodations: 51% (2012) vs 33% (2011)

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

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

Base: Overnight Trips

% Rating Factor As Very Important*

- A fun place for couples
- Lots of cultural things to see or experience
- Lots of historic things to see or experience
- Being at a place I’ve never seen before
- Lots of information about the destination on the…
- A fun city environment
- Within a two-hour drive from home
- Great shopping
- Great opportunities for nature/eco-travel
- Availability of camping or RV facilities
- Different or unique local artwork/craftwork
- Focus on “green travel”

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

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of things for adults to see and do: 67 (2012), 25 (2011)
- Lots of historic things to see or experience: 67 (2012), 29 (2011)
- Being at a place I’ve never seen before: 66 (2012), 28 (2011)
- Having family or friends who live in the region: 64 (2012), 44 (2011)
- Convenient access by car: 64 (2012), 59 (2011)
- Availability of economy or budget accommodations: 62 (2012), 36 (2011)
- Lots of information about the destination on the…: 61 (2012), 16 (2011)
- Focus on “green travel”: 60 (2012), 13 (2011)
- Feeling safe at the destination: 59 (2012), 17 (2011)
- Lots of cultural things to see or experience: 59 (2012), 17 (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Within a two-hour drive from home: 58% (2012), 32% (2011)
- Availability of mid-range accommodations: 58% (2012), 34% (2011)
- A great rural/agricultural area: 57% (2012), 22% (2011)
- A fun city environment: 56% (2012), 20% (2011)
- Lots of things for children to see and do: 55% (2012), 26% (2011)
- Great opportunities for nature/eco-travel: 55% (2012), 14% (2011)
- Great shopping: 55% (2012), 13% (2011)
- Within a two-to-four-hour drive from home: 54% (2012), 38% (2011)
- Different or unique local artwork/craftwork: 52% (2012), 11% (2011)
- Availability of luxury accommodations: 51% (2012), 13% (2011)
- Unique or local food and cuisine: 51% (2012), 10% (2011)
- Availability of camping or RV facilities: 49% (2012), 22% (2011)

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

**Base: Overnight Trips**

#### % Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
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<td>46</td>
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<tr>
<td>Having family or friends who live in the region</td>
<td>69</td>
<td>54</td>
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<tr>
<td>Affordable attractions/events</td>
<td>68</td>
<td>34</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>68</td>
<td>51</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>62</td>
<td>24</td>
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<td>Lots of things for adults to see and do</td>
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</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>60</td>
<td>32</td>
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<tr>
<td>Being at a place I've never seen before</td>
<td>57</td>
<td>27</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>56</td>
<td>29</td>
</tr>
<tr>
<td>Lots of information about the destination on the destination</td>
<td>55</td>
<td>21</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>51</td>
<td>18</td>
</tr>
</tbody>
</table>

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

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Within a two-hour drive from home: 50% (2012) vs. 29% (2011)
- A fun city environment: 49% (2012) vs. 12% (2011)
- A fun place for couples: 47% (2012) vs. 16% (2011)
- Different or unique local artwork/craftwork: 46% (2012) vs. 16% (2011)
- Availability of luxury accommodations: 46% (2012) vs. 16% (2011)
- A great rural/agricultural area: 46% (2012) vs. 16% (2011)
- Lots of cultural things to see or experience: 45% (2012) vs. 25% (2011)
- Great shopping: 41% (2012) vs. 18% (2011)
- Availability of mid-range accommodations: 41% (2012) vs. 24% (2011)
- Within a two-to-four-hour drive from home: 41% (2012) vs. 21% (2011)
- Availability of camping or RV facilities: 36% (2012) vs. 20% (2011)
- Focus on “green travel”: 35% (2012) vs. 15% (2011)

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

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

Base: Overnight Trips

% Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
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<th>2011</th>
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<tbody>
<tr>
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<tr>
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<td>Availability of economy or budget accommodations</td>
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<td>Availability of mid-range accommodations</td>
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<td>Lots of things for adults to see and do</td>
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<tr>
<td>Being at a place I've never seen before</td>
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<td>44</td>
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<tr>
<td>Lots of cultural things to see or experience</td>
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<td>37</td>
</tr>
<tr>
<td>Great shopping</td>
<td>41</td>
<td>13</td>
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<tr>
<td>Availability of camping or RV facilities</td>
<td>40</td>
<td>16</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>40</td>
<td>22</td>
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</tbody>
</table>

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Unique or local food and cuisine: 39 (2012), 32 (2011)
- Different or unique local artwork/craftwork: 10 (2012), 30 (2011)
- Within a two-hour drive from home: 37 (2012), 29 (2011)
- Great opportunities for nature/eco-travel: 37 (2012), 37 (2011)
- Within a two-to-four-hour drive from home: 37 (2012), 37 (2011)
- Lots of information about the destination on the…: 31 (2012), 23 (2011)
- A fun place for couples: 29 (2012), 18 (2011)
- Availability of luxury accommodations: 26 (2012), 18 (2011)
- Lots of things for children to see and do: 26 (2012), 18 (2011)
- Focus on “green travel”: 23 (2012), 8 (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
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<td>Having family or friends who live in the region</td>
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<td>50</td>
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<tr>
<td>Being at a place I’ve never seen before</td>
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<td>38</td>
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<tr>
<td>Availability of mid-range accommodations</td>
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<td>34</td>
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<tr>
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<td>34</td>
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<tr>
<td>Unique or local food and cuisine</td>
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<td>29</td>
</tr>
<tr>
<td>Great shopping</td>
<td>50</td>
<td>27</td>
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<tr>
<td>A fun place for couples</td>
<td>48</td>
<td>27</td>
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* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit Upstate PA (cont’d)

Base: Overnight Trips

<table>
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<tr>
<th>Factor</th>
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<tbody>
<tr>
<td>Availability of economy or budget accommodations</td>
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<td>Great opportunities for nature/eco-travel</td>
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<td>Availability of camping or RV facilities</td>
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<tr>
<td>Availability of luxury accommodations</td>
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<td>Focus on “green travel”</td>
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<td>13</td>
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</tbody>
</table>

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 74 (2012), 73 (2011)
- Convenient access by car: 71 (2012), 74 (2011)
- Affordable attractions/events: 66 (2012), 74 (2011)
- Lots of things for adults to see and do: 62 (2012), 65 (2011)
- Within a two-to-four-hour drive from home: 55 (2012), 63 (2011)
- Availability of mid-range accommodations: 54 (2012), 54 (2011)
- Within a two-hour drive from home: 48 (2012), 50 (2011)
- Lots of information about the destination on the Internet: 37 (2012), 49 (2011)
- Unique or local food and cuisine: 36 (2012), 49 (2011)
- Availability of luxury accommodations: 36 (2012), 46 (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Lots of cultural things to see or experience
- Great shopping
- Availability of economy or budget accommodations
- Having family or friends who live in the region
- Lots of historic things to see or experience
- Great opportunities for nature/eco-travel
- A fun city environment
- Lots of things for children to see and do
- A great rural/agricultural area
- Different or unique local artwork/craftwork
- Availability of camping or RV facilities
- Focus on “green travel”

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Feeling safe at the destination: 80 (2012), 71 (2011)
- Convenient access by car: 75 (2012), 68 (2011)
- Affordable attractions/events: 71 (2012), 64 (2011)
- Lots of things for adults to see and do: 70 (2012), 57 (2011)
- Availability of mid-range accommodations: 64 (2012), 48 (2011)
- Unique or local food and cuisine: 60 (2012), 27 (2011)
- Lots of cultural things to see or experience: 57 (2012), 33 (2011)
- Lots of historic things to see or experience: 57 (2012), 35 (2011)
- Great shopping: 57 (2012), 35 (2011)
- Lots of things for children to see and do: 57 (2012), 34 (2011)
- Availability of economy or budget accommodations: 56 (2012), 33 (2011)
- Lots of information about the destination on the…: 55 (2012), 22 (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Within a two-to-four-hour drive from home: 52% (2012), 29% (2011)
- A great rural/agricultural area: 51% (2012), 22% (2011)
- A fun city environment: 51% (2012), 24% (2011)
- Being at a place I’ve never seen before: 51% (2012), 26% (2011)
- A fun place for couples: 45% (2012), 22% (2011)
- Different or unique local artwork/craftwork: 45% (2012), 14% (2011)
- Great opportunities for nature/eco-travel: 41% (2012), 8% (2011)
- Availability of luxury accommodations: 40% (2012), 12% (2011)
- Within a two-hour drive from home: 40% (2012), 12% (2011)
- Focus on “green travel”: 38% (2012), 6% (2011)
- Having family or friends who live in the region: 36% (2012), 17% (2011)
- Availability of camping or RV facilities: 30% (2012), 17% (2011)

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

Base: Overnight Trips

% Rating Factor As Very Important*

- Convenient access by car: 79% (2012), 43% (2011)
- Feeling safe at the destination: 75% (2012), 55% (2011)
- Affordable attractions/events: 70% (2012), 48% (2011)
- Having family or friends who live in the region: 61% (2012), 49% (2011)
- Lots of things for adults to see and do: 57% (2012), 30% (2011)
- A fun city environment: 56% (2012), 18% (2011)
- Being at a place I've never seen before: 53% (2012), 27% (2011)
- Unique or local food and cuisine: 52% (2012), 28% (2011)
- Within a two-to-four-hour drive from home: 51% (2012), 23% (2011)
- A fun place for couples: 49% (2012), 21% (2011)
- Availability of economy or budget accommodations: 46% (2012), 27% (2011)
- Lots of historic things to see or experience: 46% (2012), 25% (2011)

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

% Rating Factor As Very Important*

<table>
<thead>
<tr>
<th>Factor</th>
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<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-hour drive from home</td>
<td>46</td>
<td>20</td>
</tr>
<tr>
<td>Great shopping</td>
<td>43</td>
<td>21</td>
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<tr>
<td>Availability of mid-range accommodations</td>
<td>42</td>
<td>21</td>
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<tr>
<td>Lots of cultural things to see or experience</td>
<td>42</td>
<td>18</td>
</tr>
<tr>
<td>Lots of information about the destination on the…</td>
<td>42</td>
<td>21</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>41</td>
<td>24</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>33</td>
<td>26</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>32</td>
<td>16</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>30</td>
<td>14</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>30</td>
<td>13</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>26</td>
<td>5</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>26</td>
<td>18</td>
</tr>
</tbody>
</table>

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

Base: Overnight Trips

% Rating Factor As Very Important*  

<table>
<thead>
<tr>
<th>Factor</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling safe at the destination</td>
<td>71</td>
<td>63</td>
</tr>
<tr>
<td>Affordable attractions/events</td>
<td>70</td>
<td>63</td>
</tr>
<tr>
<td>Convenient access by car</td>
<td>65</td>
<td>60</td>
</tr>
<tr>
<td>Lots of things for adults to see and do</td>
<td>67</td>
<td>57</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>58</td>
<td>54</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>58</td>
<td>53</td>
</tr>
<tr>
<td>Unique or local food and cuisine</td>
<td>49</td>
<td>45</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>47</td>
<td>45</td>
</tr>
<tr>
<td>Availability of economy or budget accommodations</td>
<td>46</td>
<td>45</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>45</td>
<td>45</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>55</td>
<td>55</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>53</td>
<td>44</td>
</tr>
</tbody>
</table>

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

**Base: Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td></td>
<td>33</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td></td>
<td>41</td>
</tr>
<tr>
<td>Being at a place I’ve never seen before</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td></td>
<td>36</td>
</tr>
<tr>
<td>Great shopping</td>
<td></td>
<td>36</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td></td>
<td>35</td>
</tr>
<tr>
<td>Having family or friends who live in the region</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>

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

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

Base: Overnight Marketable Trips

Relative Importance

<table>
<thead>
<tr>
<th>Factor</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>Highest</td>
</tr>
<tr>
<td>Adult Atmosphere</td>
<td>Next</td>
</tr>
<tr>
<td>Family Destination</td>
<td>Third</td>
</tr>
<tr>
<td>Worry Free</td>
<td>Fourth</td>
</tr>
<tr>
<td>Climate</td>
<td>Fifth</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>Sixth</td>
</tr>
<tr>
<td>Luxurious</td>
<td>Seventh</td>
</tr>
<tr>
<td>Affordable</td>
<td>Eighth</td>
</tr>
<tr>
<td>Unique</td>
<td>Ninth</td>
</tr>
<tr>
<td>Entertainment</td>
<td>Tenth</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>Eleventh</td>
</tr>
</tbody>
</table>

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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A fun place for a vacation/getaway</td>
</tr>
<tr>
<td>2</td>
<td>Exciting destination</td>
</tr>
<tr>
<td>3</td>
<td>Good for adult vacation/getaway</td>
</tr>
<tr>
<td>4</td>
<td>Lots to see and do</td>
</tr>
<tr>
<td>5</td>
<td>A good place for couples to visit</td>
</tr>
<tr>
<td>6</td>
<td>Good place for families to visit</td>
</tr>
<tr>
<td>7</td>
<td>Must-see destination</td>
</tr>
<tr>
<td>8</td>
<td>Truly beautiful scenery</td>
</tr>
<tr>
<td>9</td>
<td>A place I would feel welcome</td>
</tr>
<tr>
<td>10</td>
<td>Good place to get away and relax</td>
</tr>
<tr>
<td>11</td>
<td>A fun place for kids</td>
</tr>
<tr>
<td>12</td>
<td>Great place for walking/strolling about</td>
</tr>
<tr>
<td>13</td>
<td>Great shopping</td>
</tr>
<tr>
<td>14</td>
<td>Interesting cities</td>
</tr>
<tr>
<td>15</td>
<td>A place welcoming for children</td>
</tr>
<tr>
<td>16</td>
<td>Warm/friendly people</td>
</tr>
</tbody>
</table>

*A measure of the degree of association between each attribute and whether Destination is a place “I would really enjoy visiting.”*
Image ratings by recent visitors can be viewed as product ratings such that the recent visitor is, presumably, rating Pennsylvania from his/her experience.

Pennsylvania image’s strengths among recent visitors include well-known landmarks, lots of things to see and do, and being a fun place for a vacation. Also, its proximity to visitors and family friendly atmosphere are among Pennsylvania’s strengths.
Pennsylvania’s Product Delivery

**Percent Who Strongly Agree**

- Climate: 71%
- Worry Free: 71%
- Adult Atmosphere: 71%
- Family Destination: 71%
- Affordable: 71%
- Exciting: 69%
- Sightseeing: 69%
- Unique: 62%
- Luxurious: 61%
- Sports and Recreation: 61%
- Entertainment: 59%

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

Percent Who Strongly Agree

- Exciting: 69%
- A fun place for a vacation/getaway: 73%
- Exciting destination: 65%

Base: Overnight Marketable Trips
Pennsylvania’s Product Delivery — Adult Atmosphere

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Adult Atmosphere: 71%
- Good for adult vacation/getaway: 70%
- A good place for couples to visit: 72%
Pennsylvania’s Product Delivery — Family Destination

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Family Destination: 71%
- Good place for families to visit: 74%
- A fun place for kids: 69%
- A place welcoming for children: 70%
Pennsylvania’s Product Delivery — Worry Free

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Worry Free: 71%
- A place I would feel welcome: 72%
- Good place to get away and relax: 73%
- Warm/friendly people: 68%
- Safe place to travel in tourist areas: 72%
Pennsylvania’s Product Delivery — Climate

Base: Overnight Marketable Trips

Percent Who Strongly Agree

Climate was perfect for what we wanted to do

Climate

71

Climate was perfect for what we wanted to do

71
Pennsylvania’s Product Delivery — Sightseeing

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Sightseeing: 69%
- Lots to see and do: 74%
- Truly beautiful scenery: 73%
- Great place for walking/strolling about: 74%
- Great shopping: 68%
- Interesting cities: 69%
- Interesting small towns/villages: 70%
- Excellent State/National parks: 68%
- Interesting festivals/fairs: 68%
- Great farm stands/farmers' markets: 66%
- Great place for antiquing: 66%
- Beautiful gardens & parks: 67%
- Authentic & exciting historical re-enactments: 66%
- Well-known landmarks: 76%
- Noted for its history: 72%
- Authentic historical sites: 73%
- Great place for birding/nature viewing: 65%
- Great wilderness areas: 67%
- Excellent museums/art galleries: 65%
- Too much to do and see in just one visit: 66%
Pennsylvania’s Product Delivery — Luxurious

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Luxurious: 61%
- First-class hotels: 64%
- First-class resorts: 57%
- Good place to find elegant, sophisticated restaurants: 61%
Pennsylvania’s Product Delivery — Affordable

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Affordable: 71%
- Great value for the money: 69%
- Very affordable vacation destination: 68%
- Easy to get to: 74%
- Affordable accommodations: 72%
- Very affordable for a getaway weekend: 71%
- Not too far away for a vacation: 73%
- Close enough for a weekend getaway: 70%
Pennsylvania’s Product Delivery — Unique

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Unique: 62%
- Unique & Interesting customs/traditions: 63%
- Lots of unique local cuisine: 63%
- Talented artisans: 59%

176
Pennsylvania’s Product Delivery — Entertainment

Base: Overnight Marketable Trips

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Service</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>59</td>
</tr>
<tr>
<td>Great for theater and the arts</td>
<td>60</td>
</tr>
<tr>
<td>Great live music</td>
<td>57</td>
</tr>
</tbody>
</table>
Pennsylvania’s Product Delivery — Sports & Recreation

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Sports and Recreation: 61%
- Great leisure biking: 62%
- Good place for skiing/winter sports: 62%
- Fun & challenging golf courses: 57%
- Excellent fishing: 61%
- Good place for extreme/adventure sports: 58%
- Great camping: 64%
- Great mountain/off-road bicycling: 63%
- Excellent hunting: 59%
Pennsylvania’s Top 20 Image Attributes

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- Well-known landmarks: 76
- Lots to see and do: 74
- Easy to get to: 74
- Great place for walking/strolling about: 74
- Good place for families to visit: 74
- A fun place for a vacation/getaway: 73
- Good place to get away and relax: 73
- Not too far away for a vacation: 73
- Truly beautiful scenery: 73
- Authentic historical sites: 73
Pennsylvania’s Top 20 Image Attributes (cont’d)

Base: Overnight Marketable Trips

Percent Who Strongly Agree

- A good place for couples to visit: 72%
- Affordable accommodations: 72%
- Safe place to travel in tourist areas: 72%
- A place I would feel welcome: 72%
- Noted for its history: 72%
- Climate was perfect for what we wanted to do: 71%
- Very affordable for a getaway weekend: 71%
- Interesting small towns/villages: 70%
- Good for adult vacation/getaway: 70%
- Close enough for a weekend getaway: 70%
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents

Base: Overnight Marketable Trips

Percent who strongly agree

- Well-known landmarks: PA Residents 69, Non-Residents 79
- Lots to see and do: PA Residents 76, Non-Residents 74
- Easy to get to: PA Residents 78, Non-Residents 72
- Great place for walking/strolling about: PA Residents 72, Non-Residents 74
- Good place for families to visit: PA Residents 72, Non-Residents 74
- A fun place for a vacation/getaway: PA Residents 74, Non-Residents 73
- Good place to get away and relax: PA Residents 73, Non-Residents 73
- Not too far away for a vacation: PA Residents 75, Non-Residents 73
- Truly beautiful scenery: PA Residents 77, Non-Residents 72
- Authentic historical sites: PA Residents 68, Non-Residents 74
Pennsylvania’s Top 20 Image Attributes: PA Residents vs. Non-Residents (cont’d)

Base: Overnight Marketable Trips

### Percent who strongly agree

<table>
<thead>
<tr>
<th>Attribute</th>
<th>PA Residents</th>
<th>Non-Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>A good place for couples to visit</td>
<td>71</td>
<td>73</td>
</tr>
<tr>
<td>Affordable accommodations</td>
<td>72</td>
<td>72</td>
</tr>
<tr>
<td>Safe place to travel in tourist areas</td>
<td>70</td>
<td>73</td>
</tr>
<tr>
<td>A place I would feel welcome</td>
<td>74</td>
<td>71</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>71</td>
<td>72</td>
</tr>
<tr>
<td>Climate was perfect for what we…</td>
<td>73</td>
<td>71</td>
</tr>
<tr>
<td>Very affordable for a getaway weekend</td>
<td>73</td>
<td>71</td>
</tr>
<tr>
<td>Interesting small towns/villages</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>Good for adult vacation/getaway</td>
<td>75</td>
<td>70</td>
</tr>
<tr>
<td>Close enough for a weekend getaway</td>
<td>69</td>
<td>78</td>
</tr>
</tbody>
</table>
Trip Benefits — Marketable Overnight Trips
Benefits From Pennsylvania Overnight Trip

Base: Overnight Marketable Trips

- Relaxed/relieved stress: 56% (2012), 46% (2011)
- Break from the day-to-day: 49% (2012), 41% (2011)
- Created lasting memories: 38% (2012), 34% (2011)
- Enriched relationship with family/friends: 36% (2012), 38% (2011)
- No fixed schedule: 34% (2012), 34% (2011)
- Visited a place I've never seen before: 22% (2012), 15% (2011)
- Improved family ties: 20% (2012), 18% (2011)
- Arrived home with great stories: 17% (2012), 18% (2011)
### Benefits From Pennsylvania Overnight Trip (cont’d)

**Base:** Overnight Marketable Trips

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percent of Total</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced knowledge of history</td>
<td>17</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Renewed personal connections</td>
<td>20</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Try new things</td>
<td>15</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Enhanced cultural experiences</td>
<td>14</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Physically challenged and energized</td>
<td>11</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Better outlook on life</td>
<td>11</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Was pampered</td>
<td>8</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Intellectually challenged and energized</td>
<td>6</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Gained new skill(s)</td>
<td>1</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>
Pennsylvania Day-Trips
Origin Markets — Pennsylvania Day-Trips
State Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>State</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>49</td>
</tr>
<tr>
<td>New Jersey</td>
<td>15</td>
</tr>
<tr>
<td>New York</td>
<td>10</td>
</tr>
<tr>
<td>Maryland</td>
<td>7</td>
</tr>
<tr>
<td>Ohio</td>
<td>6</td>
</tr>
<tr>
<td>Delaware</td>
<td>3</td>
</tr>
<tr>
<td>West Virginia</td>
<td>2</td>
</tr>
<tr>
<td>Virginia</td>
<td>2</td>
</tr>
</tbody>
</table>
Urban Origin Markets – Marketable Day-Trips

Base: Marketable Day-Trips

Percent of Total

Philadelphia, PA - 23
Pittsburgh, PA - 10
Wilkes Barre-Scranton, PA - 8
Harrisburg-Lncstr-Leb-York, PA - 7
Johnstown-Altoona, PA - 4
Erie, PA - 2

New York, NY - 16
Washington, DC - 4
Baltimore, MD - 4
Cleveland, OH - 3
Youngstown, OH - 3
Buffalo, NY - 2

In-State DMA’s
Out-of-State DMA’s
Traveler Profile — Marketable Day-Trips
Gender

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Male</strong></td>
<td>44</td>
<td>48</td>
</tr>
<tr>
<td><strong>Female</strong></td>
<td>56</td>
<td>52</td>
</tr>
</tbody>
</table>
Age

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>25-34</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>35-44</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>45-54</td>
<td>20</td>
<td>19</td>
</tr>
<tr>
<td>55-64</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>65+</td>
<td>13</td>
<td>12</td>
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</tbody>
</table>

Average Age

<table>
<thead>
<tr>
<th></th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45.1</td>
<td>43.5</td>
</tr>
</tbody>
</table>

Pennsylvania

US Average
Race

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Race</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>89</td>
<td>83</td>
</tr>
<tr>
<td>African-American</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>9</td>
</tr>
</tbody>
</table>

Pennsylvania
US Average
Hispanic Background

Base: Marketable Day-Trips

Percent of Total

- Yes: Pennsylvania 5, US Average 10
- No: Pennsylvania 95, US Average 90

Pennsylvania
US Average
Marital Status

Base: Marketable Day-Trips

Percent of Total

- **Married/With partner**
  - Pennsylvania: 62%
  - US Average: 61%

- **Never married**
  - Pennsylvania: 24%
  - US Average: 25%

- **Divorced/Widowed/ Separated**
  - Pennsylvania: 13%
  - US Average: 14%
Household Size

Base: Marketable Day-Trips

Percent of Total

- 1 member: Pennsylvania 19, US Average 20
- 2 members: Pennsylvania 33, US Average 33
- 3 members: Pennsylvania 19, US Average 20
- 4 members: Pennsylvania 16, US Average 15
- 5+ members: Pennsylvania 12, US Average 12

Average Household Size:
- Pennsylvania: 2.8
- United States: 2.8
Education

Base: Marketable Day-Trips

Percent of Total

- Post-graduate: Pennsylvania 13, US Average 12
- College graduate: Pennsylvania 28, US Average 37
- Some college: Pennsylvania 25, US Average 24
- High school or less: Pennsylvania 22, US Average 25
- Other: Pennsylvania 2, US Average 1

Pennsylvania
US Average
Employment

Base: Marketable Day-Trips

Percent of Total

- Full time/self-employed
  - Pennsylvania: 44%
  - US Average: 46%
- Part time
  - Pennsylvania: 11%
  - US Average: 11%
- Not employed/retired/other
  - Pennsylvania: 45%
  - US Average: 43%
Income

Base: Marketable Day-Trips

Percent of Total

- $150K+ (Pennsylvania: 5, US Average: 5)
- $100K-149.9K (Pennsylvania: 15, US Average: 13)
- $75K-$99.9K (Pennsylvania: 15, US Average: 14)
- $30K-$49.9K (Pennsylvania: 20, US Average: 22)
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: 37% (2012), 36% (2011)
- Live nearby: 28% (2012), 26% (2011)
- Recommendation from friend: 9% (2012), 9% (2011)
- Saw/heard advertisement: 6% (2012), 3% (2011)
- Read an article/Heard a news story: 3% (2012), 2% (2011)
Planning Cycle

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Duration</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month or More</td>
<td>30</td>
<td>28</td>
</tr>
<tr>
<td>3 weeks</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>2 weeks</td>
<td>16</td>
<td>22</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>16</td>
<td>13</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>24</td>
<td>18</td>
</tr>
<tr>
<td>Same day</td>
<td>4</td>
<td>8</td>
</tr>
</tbody>
</table>
Information Sources Used for Planning

Base: Marketable Day-Trips

Percent of Total

- **Online/Internet**: 26% (2012), 19% (2011)
- **Books**: 17% (2012), 9% (2011)
- **Personal experience**: 18% (2012), 15% (2011)
- **Travel guide**: 13% (2012), 7% (2011)
- **Advice from friends/relatives**: 12% (2012), 10% (2011)
- **Auto club**: 9% (2012), 5% (2011)
- **Television**: 6% (2012), 2% (2011)
- **Social Media**: 6% (2012), 1% (2011)
- **Magazines**: 6% (2012), 2% (2011)
Information Sources Used for Planning (cont’d)

Base: Marketable Day-Trips

Percent of Total

- Hotel/resort: 5% (2012), 5% (2011)
- State tourism office: 3% (2012), 1% (2011)
- Newspapers: 5% (2012), 2% (2011)
- Local visitors bureaus/CoC: 5% (2012), 1% (2011)
- A toll-free number: 3% (2012), 1% (2011)
- Radio: <1% (2012), <1% (2011)
- Association/club: <1% (2012), <1% (2011)
- Electronic newsletter: 1% (2012), 1% (2011)
- Travel Agent: <1% (2012), <1% (2011)
Use of Pennsylvania Trip Planning Tools

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Tool</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.visitpa.com">www.visitpa.com</a></td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Pennsylvania travel guide</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>Blog about Pennsylvania</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Pennsylvania Facebook page</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>PURSUITS magazine</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Pennsylvania Twitter page</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

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**www.visitpa.com** Usefulness

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Useful</th>
<th>Very Useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>45</td>
<td>55</td>
</tr>
<tr>
<td>2012</td>
<td>31</td>
<td>69</td>
</tr>
</tbody>
</table>

Percent

- Somewhat Useful
- Very Useful

* Caution - low base size.
Travel Guide Usefulness

Base: Marketable Day-Trips

- 2012: 12% Somewhat Useful, 88% Very Useful
- 2011: 48% Somewhat Useful, 52% Very Useful

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

Base: Marketable Day-Trips

Percent of Total

- Car route/locations/map: 29% (2012), 25% (2011)
- Local activities/attractions/things to see and do: 22% (2012), 18% (2011)
- Restaurants: 15% (2012), 10% (2011)
- Accommodation: 14% (2012), 7% (2011)
- Flight/train/bus/rental car: 5% (2012), 2% (2011)
- Packages tours/cruises: 2% (2012), 2% (2011)
Reasons for Visiting www.visitpa.com

Base: Marketable Day-Trips

Percent of Total

- To help me decide which Pennsylvania destination to visit:
  - 2012: 49%
  - 2011: 55%

- To help me decide to visit Pennsylvania:
  - 2012: 24%
  - 2011: 6%

- To learn more about Pennsylvania:
  - 2012: 15%
  - 2011: 34%

- To obtain more information after I decided to visit:
  - 2012: 11%
  - 2011: 44%
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>2012</td>
<td>4</td>
<td>7</td>
<td>59</td>
<td>30</td>
</tr>
<tr>
<td>2011</td>
<td>6</td>
<td></td>
<td>66</td>
<td>27</td>
</tr>
</tbody>
</table>

Percent
Technology Used by Travelers

Base: Marketable Day-Trips

Percent of Total

- Desktop computer: 50%
  - Planning the trip: 6%
  - During the trip: 15%

- Laptop computer: 30%
  - Planning the trip: 15%

- Smartphone: 40%
  - Planning the trip: 9%
  - During the trip: 15%

- Tablet computer: 15%
  - Planning the trip: 8%
  - During the trip: 15%
Planning Considerations Beyond Cost

Base: Marketable Day-Trips

Percent of Total

- Destination I wanted to see and experience: 38% (2012), 30% (2011)
- Activities I wanted to do: 26% (2012), 23% (2011)
- Performance/event/occasion I wanted to attend: 11% (2012), 10% (2011)
- Looking for a certain type of vacation experience: 11% (2012), 10% (2011)
- Near by destination: 8% (2012), 10% (2011)
- Cost was the only consideration: 6% (2012), 4% (2011)
- Visit Family/friends: 5% (2012), 3% (2011)
Percent Who Booked In Advance

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>39</td>
</tr>
<tr>
<td>2012</td>
<td>52</td>
</tr>
</tbody>
</table>
Booking Cycle

Base: Marketable Day-Trips Booked in Advance

<table>
<thead>
<tr>
<th>Percent of Total</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 1 month in advance</td>
<td>32</td>
<td>24</td>
</tr>
<tr>
<td>3 weeks</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>2 weeks</td>
<td>12</td>
<td>24</td>
</tr>
<tr>
<td>4 to 7 days</td>
<td>22</td>
<td>10</td>
</tr>
<tr>
<td>1 to 3 days</td>
<td>10</td>
<td>14</td>
</tr>
<tr>
<td>Same day</td>
<td>7</td>
<td>11</td>
</tr>
</tbody>
</table>

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### Use of Vacation Packages and Group Travel

**Base:** Marketable Day-Trips

<table>
<thead>
<tr>
<th>Service</th>
<th>Percent of Total</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Paid Package</td>
<td></td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Escorted Group Tour</td>
<td></td>
<td>12</td>
<td>13</td>
</tr>
</tbody>
</table>
Marketable Day-Trip Characteristics
Distance Traveled for Pennsylvania Day-Trip

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Distance Range</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 100 Miles</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>100-149 Miles</td>
<td>22%</td>
<td>26%</td>
</tr>
<tr>
<td>150-199 Miles</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Over 200 Miles</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Percent of Total
Transportation Used to Enter Pennsylvania

Base: Marketable Day-Trips

Percent of Total

- **Own car**: 82% (2012) / 87% (2011)
- **Rental car**: 3% (2012) / 1% (2011)
- **Bicycle/Motorcycle**: 2% (2012) / 1% (2011)
- **Truck/Van/RV**: 2% (2012) / 1% (2011)
- **Train**: 5% (2012) / 6% (2011)
- **Bus**: 3% (2012) / 3% (2011)
- **Taxi**: 4% (2012)
- **Plane**: 3% (2012)
Size of Travel Party

Base: Marketable Day-Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Average No. of People</th>
<th>Adults</th>
<th>Children under 18</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>2.3</td>
<td>2.3</td>
<td>0.7</td>
<td>3.1</td>
</tr>
<tr>
<td>2011</td>
<td>2.3</td>
<td>2.3</td>
<td>0.5</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Total = 3.1
Total = 2.9

Average No. of People

- Adults
- Children under 18
Composition of Travel Party

Base: Marketable Day-Trips

Percent of Total

- **Spouse/Partner**
  - 2012: 57%
  - 2011: 63%

- **Child(ren)**
  - 2012: 33%
  - 2011: 37%

- **Friend(s)**
  - 2012: 21%
  - 2011: 16%

- **Just Myself**
  - 2012: 10%
  - 2011: 12%

- **Other Relative(s)**
  - 2012: 10%
  - 2011: 10%

- **Parent(s)**
  - 2012: 10%
  - 2011: 7%

- **Grandparents**
  - 2012: 1%
  - 2011: 1%
Trip Experiences — Marketable Day-Trips
Things Seen and Experienced on Pennsylvania Day-Trip

Base: Marketable Day-Trips

Percent of Total

- Other shopping: 22% (2012), 16% (2011)
- Scenic drive: 15% (2012), 15% (2011)
- Historical house museum: 15% (2012), 8% (2011)
- Outlet shopping: 14% (2012), 14% (2011)
- Farmer's market: 13% (2012), 6% (2011)
- State/national park: 7% (2012), 8% (2011)
- Unique shopping: 7% (2012), 6% (2011)
- Local artist: 6% (2012), 2% (2011)
- Art museum/exhibit: 6% (2012), 3% (2011)
- Other historical sites: 6% (2012), 5% (2011)
- Zoo: 6% (2012), 4% (2011)
Things Seen and Experienced on Pennsylvania Day-Trip (cont’d)

Base: Marketable Day-Trips

Percent of Total

- Civil war site: 4 (2012), 3 (2011)
- Revolutionary war site: 1 (2012), 4 (2011)
- Brewery: 3 (2012), 2 (2011)
- Historical re-enactments: 3 (2012), 2 (2011)
- Other guided tour: 2 (2012), 1 (2011)
- Other museums: 2 (2012), 4 (2011)

2012

2011
Dining/Entertainment

Base: Marketable Day-Trips

Percent of Total

<table>
<thead>
<tr>
<th>Activity</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique local foods</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>Casino/racetrack</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Nightlife</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Up-scale restaurants</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Bar/disco/nightclub</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Other live performance</td>
<td>&lt;1</td>
<td>4</td>
</tr>
<tr>
<td>Local music</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Theater/dance/symphony/opera</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Professional theater</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Classical music/dance</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
Sports and Recreation

Base: Marketable Day-Trips

Percent of Total

- Amusement/waterpark: 19% (2012), 16% (2011)
- Hiking: 5% (2012), 6% (2011)
- Other outdoor sport/activity: 6% (2012), 7% (2011)
- Fishing: 4% (2012), 4% (2011)
- Swam in a pool: 3% (2012), 4% (2011)
- Camping: 2% (2012), 3% (2011)
- Professional/college sports event: 3% (2012), 3% (2011)
- Biking: 1% (2012), 3% (2011)
- Golfing: 1% (2012), 2% (2011)
- Backpacking: <1% (2012), 2% (2011)
- Snow skiing/snowboarding: 2% (2012), 1% (2011)
- Meditation center: 2% (2012), 1% (2011)
- Swam in a lake/river: 2% (2012), 2% (2011)
Trip Benefits — Marketable Day-Trips
### Benefits From Pennsylvania Day-Trip

**Base: Marketable Day-Trips**

#### Percent of Total

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxed and relieved stress</td>
<td>59</td>
<td>50</td>
</tr>
<tr>
<td>A break from the day-to-day environment</td>
<td>54</td>
<td>56</td>
</tr>
<tr>
<td>Enjoyed life with no fixed schedule</td>
<td>36</td>
<td>28</td>
</tr>
<tr>
<td>Created lasting memories</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>Enriched relationship with spouse/children/friends</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Enhanced knowledge of history</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>Improved family ties</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Got to visit a place I've never seen</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>Enhanced cultural experiences</td>
<td>13</td>
<td>13</td>
</tr>
</tbody>
</table>

- **2012**
- **2011**
Benefits From Pennsylvania Day-Trip (cont’d)

- Arrived home with great stories to share: 8% (2012), 12% (2011)
- Got to try new things: 11% (2012), 12% (2011)
- Better outlook on life: 8% (2012), 6% (2011)
- Was physically challenged and energized: 7% (2012), 5% (2011)
- Renewed personal connections: 8% (2012), 7% (2011)
- Was intellectually challenged and energized: 4% (2012), 3% (2011)
- Was pampered: 3% (2011)
- Gained new skill(s): 2% (2011)