The research for this report was conducted by Longwoods International. The results consist of:

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

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

For the 2011 travel year, this yielded: 207,014 trips for analysis nationally – 138,771 overnight trips and 68,243 day trips.
Research Methodology (cont’d)

- The *Travel USA®* program identified 5,790 survey respondents who visited Pennsylvania on an overnight trip and 4,530 on a day-trip in 2011.

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

- There were 1,883 total responses for the overnight segment and 990 total responses for the day-trip segment from this return sample.

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

*Spent time in region
Sum or regions will exceed State total as a number of travelers visited more than one region.
Region Visited on Day Trips*

- Philadelphia & The Countryside
- Dutch Country Roads
- Pittsburgh & Its Countryside
- Pocono Mountains
- Upstate PA
- Pennsylvania’s Great Lakes
- Lehigh Valley
- Valleys of the Susquehanna
- The Alleghenies
- Pennsylvania Wilds
- Laurel Highlands

*Spent time in region
Sum of regions will exceed State total as a number of travelers visited more than one region.
Dutch Country Roads Region
Main Reason for Trip
The Dutch Country Roads region had the second highest proportion of overnight travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011.
The Dutch Country Roads region had the highest proportion of day-travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011.
Dutch Country Roads Region
Main Origin Markets – Marketable Overnight Leisure Trips
Main Origin States for Marketable Overnight Leisure Trips

Base: Total Marketable Overnight Leisure Trips

- Maryland: 10% (2011), 12% (2010)
- Virginia: 8% (2011), 6% (2010)
- Ohio: 3% (2011), 4% (2010)
- Delaware: 3% (2011), 2% (2010)
Main Origin Markets for Marketable Overnight Leisure Trips

Base: Total Marketable Overnight Leisure Trips

**In-State DMAs**
- Wilkes Barre-Scranton: 3% (2011), 4% (2010)
- Pittsburgh: 3% (2011), 2% (2010)

**Out-of-State DMAs**
- Baltimore, MD: 7% (2011), 8% (2010)
Dutch Country Roads Region
Origin Markets – Marketable Leisure Day-Trips
Main Origin States for Marketable Leisure Day-Trips

Base: Total Marketable Leisure Day-Trips

- Maryland: 20% (2011), 20% (2010)
- New Jersey: 12% (2011), 10% (2010)
- Delaware: 5% (2011), 4% (2010)
- Virginia: 3% (2011), 5% (2010)
- West Virginia: 2% (2011), 0% (2010)
Main Urban Origin Markets for Marketable Leisure Day-Trips

Base: Total Marketable Leisure Day-Trips

In-State DMA's

- Philadelphia: 8% (2011), 8% (2010)

Out-of-State DMA's

Dutch Country Roads Region Traveler Profile
Gender

**OVERNIGHT**
Base: Total Marketable Overnight Trips

- Male: 41%
- Female: 59%

**DAY-TRIPS**
Base: Total Marketable Day-Trips

- Male: 42%
- Female: 58%

- Dutch Country Roads
- Pennsylvania
- US Average
Race

OVERTNIGHT

Base: Total Marketable Overnight Trips

Dutch Country Roads
Pennsylvania
US Average

White
92%
91%
87%

African-American
3%
5%
5%

Other
1%
4%
8%

DAY-TRIPS

Base: Total Marketable Day-Trips

Dutch Country Roads
Pennsylvania
US Average

White
94%
93%
87%

African-American
2%
3%
5%

Other
1%
4%
8%
Marital Status

**OVERNIGHT**

Base: Total Marketable Overnight Trips

- **Married/With partner**: 79%
  - Dutch Country Roads: 73%
  - Pennsylvania: 70%
  - US Average: 70%
- **Never married**: 16%
  - Dutch Country Roads: 20%
  - Pennsylvania: 22%
  - US Average: 22%
- **Divorced/Widowed/Separated**: 6%
  - Dutch Country Roads: 7%
  - Pennsylvania: 7%
  - US Average: 7%

**DAY-TRIPS**

Base: Total Marketable Day-Trips

- **Married/With partner**: 76%
  - Dutch Country Roads: 69%
  - Pennsylvania: 68%
  - US Average: 68%
- **Never married**: 17%
  - Dutch Country Roads: 22%
  - Pennsylvania: 22%
  - US Average: 22%
- **Divorced/Widowed/Separated**: 6%
  - Dutch Country Roads: 9%
  - Pennsylvania: 10%
  - US Average: 10%
Children in Household

OVERNIGHT

Base: Total Marketable Overnight Trips

- No children under 18: Dutch Country Roads 57%, Pennsylvania 56%, US Average 59%
- Any child between 13-17: Dutch Country Roads 17%, Pennsylvania 18%, US Average 16%
- Any child between 6-12: Dutch Country Roads 20%, Pennsylvania 19%, US Average 18%
- Any child under 6: Dutch Country Roads 24%, Pennsylvania 22%, US Average 21%

DAY-TRIPS

Base: Total Marketable Day-Trips

- No children under 18: Dutch Country Roads 59%, Pennsylvania 63%, US Average 60%
- Any child between 13-17: Dutch Country Roads 17%, Pennsylvania 15%, US Average 16%
- Any child between 6-12: Dutch Country Roads 14%, Pennsylvania 15%, US Average 19%
- Any child under 6: Dutch Country Roads 22%, Pennsylvania 19%, US Average 20%
## Education

**OVERNIGHT**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Dutch Country Roads</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>17%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>College graduate</td>
<td>36%</td>
<td>39%</td>
<td>40%</td>
</tr>
<tr>
<td>Some college</td>
<td>25%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>High school or less</td>
<td>17%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

*College graduate includes both bachelor’s and associate’s degree holders.*

**DAY-TRIPS**

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<td>37%</td>
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*College graduate includes both bachelor’s and associate’s degree holders.*
Employment

OVERNIGHT

Base: Total Marketable Overnight Trips

- Full time/self-employed: 49%
- Part time: 9%
- Retired: 23%
- Not employed/Homemaker/Student: 18%

Dutch Country Roads: 52%
Pennsylvania: 49%
US Average: 49%

DAY-TRIPS

Base: Total Marketable Day-Trips

- Full time/self-employed: 49%
- Part time: 9%
- Retired: 23%
- Not employed/Homemaker/Student: 18%

Dutch Country Roads: 48%
Pennsylvania: 48%
US Average: 45%
Household Income

**OVERNIGHT**

Base: Total Marketable Overnight Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Dutch Country Roads</th>
<th>Pennsylvania</th>
<th>US Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
<td>36%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>13%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>25%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>19%</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Under $25K</td>
<td>8%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**DAY-TRIPS**

Base: Total Marketable Day-Trips

<table>
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<th>Dutch Country Roads</th>
<th>Pennsylvania</th>
<th>US Median</th>
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<td>22%</td>
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<tr>
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<td>21%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Under $25K</td>
<td>5%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Median:**

- Dutch Country Roads: $77,380
- Pennsylvania: $72,710
- US: $71,670

- Dutch Country Roads: $70,040
- Pennsylvania: $66,860
- US: $61,660
Dutch Country Roads Region
Attractions Visited
— Overnight Marketable Trips
Attractions/Events Visited
Dutch Country Roads Region*

Hershey Park: 30%
The Hershey Story, The Museum on Chocolate Avenue: 14%
Outlets at Hershey: 11%
Hershey Gardens: 9%
Indian Echo Caverns: 5%
Lake Tobias Wildlife Park: 5%
Historic Home/Museum: 5%
Antique Auto Museum at Hershey: 4%
Pennsylvania State Capitol: 4%
Covered Bridges: 3%
Winery/Vineyard: 2%
Underground Railroad: 2%
Whitaker Center for Science & the Arts: 2%
Golf course: 1%
Hershey Theater: 1%
Hollywood Casino at Penn National Race Course: 1%
National Civil War Museum: <1%

Base: Overnight Marketable Trips

*Harrisburg-Hershey area
Attractions/Events Visited
Dutch Country Roads Region*

Base: Overnight Marketable Trips

- Amish Farms/Countryside: 36%
- Outlet Mall (Rockvale, Tanger): 27%
- Covered Bridges: 15%
- Strasburg Railroad/Traintown: 10%
- Railroad Museum of Pennsylvania: 8%
- Dutch Wonderland Family Amusement Park: 7%
- Historic Home/Museum: 7%
- Ephrata Cloister: 6%
- Winery/Vineyard: 6%
- Lancaster Central Market: 5%
- People’s Place Quilt Museum: 4%
- Christiana Underground Railroad Center at Historic Zercher’s Hotel: 2%
- National Toy Train Museum: 2%
- Golf course: 1%
- Landis Valley Museum: <1%
- National Watch & Clock Museum: <1%
- Historic Lancaster Walking Tour: <1%
- People’s Place Quilt Museum: <1%
- Wheatland (President John Buchanan Home): <1%

*Lancaster and Amish farmland
Attractions/Events Visited
Dutch Country Roads Region*

Base: Overnight Marketable Trips

- Gettysburg Battlefield/National Military Park: 17%
- Historic Home/Museum: 12%
- Gettysburg National Military Park & Museum: 11%
- Covered Bridges: 10%
- Winery/Vineyard: 6%
- Eisenhower National Historic Site: 6%
- Gettysburg Diorama: 5%
- Outlet Malls at Gettysburg Village: 4%
- General Lee’s Headquarters: 4%
- Hall of Presidents & First Ladies: 4%
- Land of Little Horses: 3%
- Golf course: 2%
- Underground Railroad: 1%

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

Base: Overnight Marketable Trips

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

*York Region
Attractions/Events Visited
Dutch Country Roads Region*

Base: Overnight Marketable Trips

- VF Outlet Village: 8%
- Cabela’s: 5%
- Carlisle Auto Show: 4%
- Historic Home/Museum: 4%
- Pine Grove State Park & Iron Furnace: 3%
- Hawk Mountain: 2%
- Army Heritage & Education Center: 2%
- Kings Gap Environmental Education & Training Center: 2%
- Union Canal: 2%
- Covered Bridges: <1%
- Winery/Vineyard: <1%
- Cornwall Iron Furnace: <1%

*Remainder of Region
Dutch Country Roads Region
Importance of Factors
In Choosing to Visit the Region
Importance of Factors In Choosing to Visit Dutch Country Roads Region

Base: Overnight Marketable Trips

% Rating Factor as Very Important*

- Feeling safe at the destination: 71% (2011), 62% (2010)
- Affordable attractions/events: 57% (2011), 52% (2010)
- Availability of mid-range accommodations: 48% (2011), 39% (2010)
- Lots of things for adults to see and do: 44% (2011), 37% (2010)
- Lots of historic things to see or experience: 44% (2011), 35% (2010)
- Great shopping: 33% (2011), 26% (2010)
- Lots of cultural things to see or experience: 30% (2011), 33% (2010)
- Availability of economy or budget accommodations: 35% (2011), 33% (2010)
- Lots of things for children to see and do: 35% (2011), 32% (2010)
- Within a two-to-four-hour drive from home: 35% (2011), 29% (2010)
- Unique or local food and cuisine: 36% (2011), 27% (2010)

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

Base: Overnight Marketable Trips

% Rating Factor as Very Important*

- A fun place for couples: 2011 - 33%, 2010 - 22%
- Being at a place I've never seen before: 2011 - 31%, 2010 - 26%
- A great rural/agricultural area: 2011 - 30%, 2010 - 22%
- Within a two-hour drive from home: 2011 - 29%, 2010 - 23%
- Lots of information about the destination on the Internet: 2011 - 27%, 2010 - 22%
- Different or unique local artwork/craftwork: 2011 - 20%, 2010 - 14%
- Availability of camping or RV facilities: 2011 - 19%, 2010 - 17%
- A fun city environment: 2011 - 24%, 2010 - 17%
- Great opportunities for nature/eco-travel: 2011 - 16%, 2010 - 8%
- Focus on “green travel”: 2011 - 14%, 2010 - 6%
- Availability of luxury accommodations: 2011 - 14%, 2010 - 12%
- Having family or friends who live in the region: 2011 - 16%, 2010 - 9%

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