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.
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.
Research Methodology (cont’d)

- 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.
Pennsylvania’s Great Lakes Region
Pennsylvania’s Great Lakes Region Visitor Volume
Regions Visited on Overnight Trips*

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

<table>
<thead>
<tr>
<th>Region</th>
<th>2011 in millions of trips</th>
<th>2010 in millions of trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia &amp; The Countryside</td>
<td>20.0</td>
<td>17.0</td>
</tr>
<tr>
<td>Dutch Country Roads</td>
<td>9.3</td>
<td>8.6</td>
</tr>
<tr>
<td>Pittsburgh &amp; Its Countryside</td>
<td>8.6</td>
<td>7.8</td>
</tr>
<tr>
<td>Pocono Mountains</td>
<td>7.7</td>
<td>6.9</td>
</tr>
<tr>
<td>Upstate PA</td>
<td>6.9</td>
<td>6.3</td>
</tr>
<tr>
<td>Pennsylvania's Great Lakes</td>
<td>5.4</td>
<td>5.1</td>
</tr>
<tr>
<td>Lehigh Valley</td>
<td>4.4</td>
<td>4.2</td>
</tr>
<tr>
<td>Valleys of the Susquehanna</td>
<td>3.6</td>
<td>3.4</td>
</tr>
<tr>
<td>The Alleghenies</td>
<td>3.3</td>
<td>3.1</td>
</tr>
<tr>
<td>Pennsylvania Wilds</td>
<td>2.8</td>
<td>2.7</td>
</tr>
<tr>
<td>Laurel Highlands</td>
<td>2.2</td>
<td>2.1</td>
</tr>
</tbody>
</table>

*Spent time in region
Sum of regions will exceed State total as a number of travelers visited more than one region.
Pennsylvania’s Great Lakes Region
Main Reason for Trip
Pennsylvania’s Great Lakes Region had the fourth highest proportion of overnight travelers visiting the region for marketable (i.e., non-VFR leisure) purposes among the state’s eleven tourism regions in 2011.
Pennsylvania’s Great Lakes Region also had the fourth highest proportion of day-trip travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011.
Pennsylvania’s Great Lakes Region Origin Markets – Overnight Leisure
Main Origin States for Overnight Leisure Trips

Base: Total Overnight Leisure Trips

- Ohio: 12% (2011), 12% (2010)
- New Jersey: 4% (2011), 1% (2010)
- Virginia: 3% (2011), 2% (2010)
Main Origin Markets for Overnight Leisure Trips

Base: Total Overnight Leisure Trips

In-State DMAs
- Philadelphia, PA: 8%
- Erie, PA: 6%
- Harrisburg-Lancaster-Lebanon-York: 5%
- Johnstown-Altoona, PA: 4%
- Wilkes Barre-Scranton, PA: 3%

Out-of-State DMAs
- New York, NY/NJ/PA/CT: 11%
- Cleveland, OH: 9%
- Buffalo, NY: 7%
- Washington, DC: 2%
Pennsylvania’s Great Lakes Region Origin Markets – Leisure Day-Trips
Main Origin States for Leisure Day-Trips

Base: Total Leisure Day-Trips

Ohio: 17% (2011), 20% (2010)
New Jersey: 4% (2011), 1% (2010)
Main Origin Markets for Leisure Day-Trips

Base: Total Leisure Day-Trips

In-State DMA

- Pittsburgh: 25% (2010), 32% (2011)
- Erie: 4% (2010), 14% (2011)
- Philadelphia: 5% (2010), 4% (2011)
- Harrisburg-Lancaster-Lebanon-York: 3% (2010), 0% (2011)
- Johnstown-Altoona: 2% (2010), 2% (2011)

Out-of-State DMA

- Buffalo, NY: 16% (2010), 17% (2011)
- Cleveland, OH: 16% (2010), 13% (2011)
- New York, NY/NJ/PA/CT: 1% (2010), 4% (2011)
- Youngstown, OH: 5% (2010), 4% (2011)
Pennsylvania’s Great Lakes Region Traveler Profile
OVERNIGHT

Base: Total Overnight Leisure Trips

- Male
  - PA Great Lakes Region: 45%
  - Pennsylvania: 45%
  - US Average: 45%

- Female
  - PA Great Lakes Region: 55%
  - Pennsylvania: 55%
  - US Average: 55%

DAY-TRIPS

Base: Total Leisure Day-Trips

- Male
  - PA Great Lakes Region: 37%
  - Pennsylvania: 43%
  - US Average: 44%

- Female
  - PA Great Lakes Region: 63%
  - Pennsylvania: 57%
  - US Average: 56%
# Age

## OVERNIGHT

**Base: Total Overnight Leisure Trips**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>PA Great Lakes Region</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>19%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>25-34 years</td>
<td>24%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>35-44 years</td>
<td>22%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>18%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>10%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>8%</td>
<td>15%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Median Age:** 38.4

## DAY-TRIPS

**Base: Total Leisure Day-Trips**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>PA Great Lakes Region</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>10%</td>
<td>11%</td>
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<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>13%</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Median Age:** 45.4
**Marital Status**

### OVERNIGHT

**Base: Total Overnight Leisure Trips**

- **Married/With partner**
  - Pennsylvania's Great Lakes Region: 64%
  - Pennsylvania: 65%
  - US Average: 65%
- **Never married**
  - Pennsylvania's Great Lakes Region: 28%
  - Pennsylvania: 25%
  - US Average: 25%
- **Divorced/Widowed/Separated**
  - Pennsylvania's Great Lakes Region: 7%
  - Pennsylvania: 9%
  - US Average: 9%

### DAY-TRIPS

**Base: Total Leisure Day-Trips**

- **Married/With partner**
  - Pennsylvania's Great Lakes Region: 70%
  - Pennsylvania: 69%
  - US Average: 67%
- **Never married**
  - Pennsylvania's Great Lakes Region: 21%
  - Pennsylvania: 22%
  - US Average: 23%
- **Divorced/Widowed/Separated**
  - Pennsylvania's Great Lakes Region: 9%
  - Pennsylvania: 9%
  - US Average: 10%
Household Size

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- 1 member: 10% Pennsylvania's Great Lakes Region, 12% PA, 12% US
- 2 members: 28% Pennsylvania's Great Lakes Region, 38% PA, 38% US
- 3 members: 16% Pennsylvania's Great Lakes Region, 17% PA, 18% US
- 4 members: 20% Pennsylvania's Great Lakes Region, 20% PA, 19% US
- 5+ members: 18% Pennsylvania's Great Lakes Region, 13% PA, 13% US

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- 1 member: 14% Pennsylvania's Great Lakes Region, 10% PA, 32% US
- 2 members: 32% Pennsylvania's Great Lakes Region, 38% PA, 37% US
- 3 members: 20% Pennsylvania's Great Lakes Region, 20% PA, 19% US
- 4 members: 23% Pennsylvania's Great Lakes Region, 20% PA, 20% US
- 5+ members: 12% Pennsylvania's Great Lakes Region, 12% PA, 14% US
Children in Household

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- No children under 18: 53% Pennsylvania's Great Lakes Region, 62% Pennsylvania, 61% US Average
- Any child between 13-17: 16% Pennsylvania's Great Lakes Region, 14% Pennsylvania, 14% US Average
- Any child between 6-12: 20% Pennsylvania’s Great Lakes Region, 16% Pennsylvania, 17% US Average
- Any child under 6: 30% Pennsylvania’s Great Lakes Region, 20% Pennsylvania, 21% US Average

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- No children under 18: 55% Pennsylvania's Great Lakes Region, 63% Pennsylvania, 60% US Average
- Any child between 13-17: 17% Pennsylvania’s Great Lakes Region, 14% Pennsylvania, 15% US Average
- Any child between 6-12: 22% Pennsylvania’s Great Lakes Region, 15% Pennsylvania, 18% US Average
- Any child under 6: 25% Pennsylvania’s Great Lakes Region, 19% Pennsylvania, 20% US Average
Education

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Pennsylvania's Great Lakes Region</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>16%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>College graduate</td>
<td>34%</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Some college</td>
<td>26%</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>High school or less</td>
<td>18%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Pennsylvania's Great Lakes Region</th>
<th>Pennsylvania</th>
<th>US Average</th>
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<tr>
<td>Post-graduate</td>
<td>11%</td>
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<td>15%</td>
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<td>20%</td>
<td>37%</td>
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<tr>
<td>High school or less</td>
<td>20%</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

College graduate includes both bachelor’s and associate’s degree holders.
### Household Income

#### OVERNIGHT

<table>
<thead>
<tr>
<th>Income Range</th>
<th>PA Great Lakes</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25K</td>
<td>13%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>21%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100K+</td>
<td>10%</td>
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Base: Total Overnight Leisure Trips

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<td>$100K+</td>
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</table>

Base: Total Leisure Day-Trips

#### DAY-TRIPS

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Base: Total Overnight Leisure Trips

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<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100K+</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Leisure Day-Trips

#### Median Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>PA Great Lakes</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25K</td>
<td>$57,990</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>$69,250</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>$65,780</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>$51,490</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$100K+</td>
<td>$59,420</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Pennsylvania’s Great Lakes Region

Attractions Visited
— Overnight Marketable Trips
Attractions/Events Visited
Pennsylvania’s Great Lakes Region*

Base: Overnight Marketable Trips

- City of Erie: 43%
- Erie Zoo & Botanical Gardens: 23%
- Presque Isle State Park: 20%
- Splash Lagoon/Waldameer Water Parks: 14%
- Presque Isle Downs & Casino: 13%
- Covered Bridges: 10%
- Golf course: 8%
- Historic House/Museum: 8%
- Erie Art Museum: 7%
- Winery/Vineyard: 7%
- Tom Ridge Environmental Center: 6%
- Underground Railroad: 3%
- US Brig Niagara/Erie Maritime Museum: 2%
- Lake Erie Speedway: 1%

*Erie County
Attractions/Events Visited
Pennsylvania’s Great Lakes Region*

Base: Overnight Marketable Trips

- Conneaut Lake: 12%
- Cook Forest: 9%
- Oil City: 9%
- Oil Heritage Region: 8%
- Erie National Wildlife Refuge: 6%
- Conneaut Lake Park: 6%
- Oil Creek & Titusville Railroad: 6%
- Covered Bridges: 5%
- Underground Railroad: 5%
- Historic House/Museum: 5%
- Golf course: 4%
- Pymatuning State Park: 4%
- Grove City Shopping Outlets: 3%
- Oil Creek State Park: 3%
- Remainder of region: 12%

*Remainder of region
Pennsylvania’s Great Lakes Region

Importance of Factors In Choosing to Visit Region
Importance of Factors In Choosing to Visit Pennsylvania’s Great Lakes Region

Base: Total Overnight Trips

% Rating Factor as Very Important*

- Feeling safe at the destination: 71%
- Convenient access by car: 62%
- Affordable attractions/events: 54%
- Lots of things for adults to see and do: 48%
- Having family or friends who live in the region: 44%
- Being at a place I’ve never seen before: 42%
- Availability of mid-range accommodations: 40%
- Lots of things for children to see and do: 39%
- A fun place for couples: 39%
- Unique or local food and cuisine: 37%
- Availability of economy or budget accommodations: 37%
- Within a two-to-four-hour drive from home: 37%
- Availability of economy or budget accommodations: 26%

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

**Base: Total Overnight Trips**

<table>
<thead>
<tr>
<th>Factor</th>
<th>% Rating Factor as Very Important*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great shopping</td>
<td>36%</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>35%</td>
</tr>
<tr>
<td>Lots of information about the destination on</td>
<td>34%</td>
</tr>
<tr>
<td>A great rural/agricultural area</td>
<td>33%</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>31%</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>31%</td>
</tr>
<tr>
<td>Lots of historic things to see or experience</td>
<td>30%</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>29%</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>29%</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>28%</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>27%</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>25%</td>
</tr>
</tbody>
</table>

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