

# **Pennsylvania Annual Travel Profile 2017 Travel Year**

# Table of Contents



	<u>Page</u>
Introduction .....	4
Research Method .....	5
Executive Summary .....	7
Detailed Findings .....	22
Size & Structure of the U.S. Travel Market .....	24
Size & Structure of Pennsylvania's Travel Market .....	29
Comparison of Pennsylvania Overnight and Day-Trips .....	45
Pennsylvania Overnight Leisure Segments: Comparison of Market Segments by Age....	48
Pennsylvania Marketable Overnight Trips .....	51
Main Origin Markets .....	52
Main Origin Markets by PA Tourism Region .....	57
Traveler Profile .....	70
Trip Planning & Booking .....	82
Trip Characteristics .....	104

# Table of Contents (cont'd)



	<u>Page</u>
Overnight Marketable Trips (cont'd)	
Trip Experiences .....	111
Activities by Origin Market of Traveller .....	118
Activities by Absence/Presence of Children in Household .....	124
Regional Attractions Visited .....	128
Importance of Factors In Choice of Pennsylvania Tourism Region .....	158
Product Delivery .....	181
Trip Benefits .....	202
Pennsylvania Marketable Day-Trips .....	205
Origin Markets .....	206
Traveler Profile .....	209
Trip Planning & Booking .....	220
Trip Characteristics .....	237
Trip Experiences .....	241
Trip Benefits .....	246

# Introduction



## 2017 OVERVIEW

- Travel and tourism continues to be an important industry for Pennsylvania – a proven jobs engine providing employment opportunities for hundreds of thousands of Pennsylvanians and generating hundreds of millions of dollars in tax revenues for the state and local communities.
- In 2017, Pennsylvania hosted an estimated 202.1 million travelers (as measured in person-trips) from throughout the U.S. – a 2.7% increase from 2016 and the strongest increase since 2012.
- In contrast to the past several years, over 50% of the 5.2 million increase in PA's total visitor volume between 2016 and 2017 was derived from the overnight segment.
- Nationally, total overnight visitor volume grew 2.1%, reaching a new record high of 1.6 billion travelers.

# Research Method



The research for this report was conducted by Longwoods International.

The results consist of:

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

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

For the 2017 travel year, this produced 329,470 trips for analysis nationally – 232,320 for the overnight segment and 97,150 for day trips.

# Research Method (Cont'd)



- The **Travel USA**® program identified 8,726 survey respondents who visited Pennsylvania on an overnight trip in 2017 and 6,459 on a day trip.
- A follow-up survey was sent to a representative sample of these visitors to augment the information from **Travel USA**®, providing more in-depth information on visitor spending and visitor activity, as well as strategic data on trip characteristics, planning and booking, and impressions of Pennsylvania's tourism product.
- There were 2,183 total responses for the overnight segment and 1,093 for the day-trip segment from this return sample.
- Estimates of Pennsylvania's 2017 overnight and day-trip visitor volume were based on a number of sources, including Travel USA®, the customized return-to-sample research, and consultations with Tourism Economics.

# **Executive Summary**

# Executive Summary



***Pennsylvania's unique mix of historic, cultural, outdoor, and recreational/entertainment events and attractions and proximity to major population centers continued to attract travelers from throughout the U.S. in 2017.***

- Pennsylvania hosted an estimated 202.1 million travelers in 2017 – a 2.7% increase from 2016 that outpaced the 1.9% rate of increase in 2016 and was the strongest year-over-year rate of increase since 2012.
- As in prior years, slightly over a third of travelers (69.6 million) included an overnight stay during their 2017 Pennsylvania trip. For the first time in several years, PA's 4.0% rate of increase in overnight travel outpaced that of the U.S. (2.1%).
- Pennsylvania's significantly higher growth rate for overnight travel in 2017 relative to the U.S. average offset just a small portion the state's underperformance over the past several years, with Pennsylvania's 16% rate of growth between 2009 and 2017 remaining well below the U.S. average (23%).
- An estimated 132.5 million Day-Trips were taken to and/or within Pennsylvania in 2017 – a 1.9% increase from 2016.



# Executive Summary – Overnight Totals



***People visit Pennsylvania for a variety of reasons, but for those who stayed overnight visiting friends and relatives (VFR) continued to be the most popular reason in 2017.***

- VFR travel accounted for 46% of the state's overnight total – or an estimated 32.3 million travelers in 2017 – a percentage that remained above the U.S. average (43%), but down from 48% in 2016.
- Marketable trips (i.e., non-VFR leisure trips that may be influenced by marketing) was the second most popular reason for travel to and/or within Pennsylvania in 2017 accounting for 40%, or an estimated 27.5 million travelers of the state's overnight travelers, vs. the 43% U.S. average.
- Business and business-leisure travelers accounted for the remaining 9.8 million Pennsylvania overnight travelers in 2017, or 14% of the state total – equal to the U.S. average.

# Executive Summary – Day-Trip Totals



***As in prior years, Pennsylvania's Day-Trip travelers were far more likely to be traveling for purely leisure purposes than the state's overnight segment in 2017.***

- An estimated 132.5 million day-trips were taken to/within Pennsylvania in 2017.
- Marketable trips (i.e., leisure trips that may be influenced by marketing) were the main reason for day-trip travel to and/or within Pennsylvania accounting for 55% (unchanged from 2015 and 2016), or an estimated 72.5 million day-trip travelers in 2017, which was well above the percentage (40%) for the state's overnight travel segment.
- VFR travel continued to account for 36% of Pennsylvania's Day-Trip total, or an estimated 47.4 million travelers in 2017, vs. 46% for the overnight segment.
- Business and business-leisure travelers accounted for the remaining 12.6 million day-trip travelers, or 10% of the state's 132.5 million day-trip total.

# Executive Summary – Main Characteristics of PA's Marketable Travelers



***As in prior years, Pennsylvania's marketable overnight travelers in 2017 were primarily middle-aged, married, and educated, with slightly less than half with children under age 18 living at home.***

- Pennsylvania's marketable overnight travelers had a median age of 43.5 years – a bit below the 45.9 years of the state's marketable day-trip travelers, but above the U.S. median (41.9 years of age) for the marketable overnight segment.
- The majority (63%) of PA's overnight travelers were married or living with a partner, with that percentage rising to 74% for those 35-44 years of age.
- The vast majority of the state's marketable overnight (86%) and day-trip travelers (81%) held a college degree or had attended college.
- The median household income of the state's marketable overnight travelers was essentially unchanged from 2016 at \$62,920, remaining below the U.S. median (\$65,740). Nineteen percent of PA marketable overnight travelers reported household incomes of at least \$100,000, matching the U.S. average in 2017.

# Executive Summary – Travelers with Children



***While less than half of Pennsylvania's marketable overnight travelers, on average, had children under age 18 living at home, the percentage varies greatly depending on the age of the adult traveler.***

- On average, 48% of Pennsylvania travelers had children under 18 years of age living at home, but with the percentage far higher for those in the 25-34 and 35-44 age ranges.
- For the most part, Pennsylvania travelers were slightly less likely to have children living at home than the U.S. average.

<u>Traveler's Age</u>	Percent With Children Under 18 Years of Age	
	<u>Pennsylvania</u>	<u>U.S. Average</u>
18-24	46%	52%
25-34	65%	69%
35-44	78%	80%
45-54	55%	55%
55-64	16%	17%
65+	4%	5%

# Executive Summary – Why Vacation in Pennsylvania?



***Pennsylvania's tourism industry continues to cultivate a positive image and experience among travelers. As in prior years, nearly half of the state's marketable overnight travelers had visited before and wanted to see more.***

- The primary reason marketable overnight visitors visited Pennsylvania in 2017 was because they had visited before and wanted to see more (49%, up 2 percentage points from 2016). Over 70% had visited Pennsylvania at least once in the past year and 88% had visited the state at least once before.
- Proximity was also a factor in deciding where to travel in 2017 with an additional 20% primarily choosing Pennsylvania because they lived within the state or nearby.
- Recommendations from friends/relatives were responsible for an additional 19% of the state's marketable overnight visitors in 2017.
- Smaller percentages of leisure travelers chose to visit Pennsylvania based on an advertisement they saw or heard, an article they had read, or based on a recommendation from a social media site.

# Executive Summary – Where Do Pennsylvania's Visitors Come From?



***Pennsylvania continues to be a “drive-to” destination with the majority of travelers either Pennsylvania residents or from neighboring states.***

- Pennsylvania residents comprised 32% of the state's Marketable Overnight travelers in 2017 – up 2 percentage points from 2015 and an additional 2 percentage points from 2016. At 45%, Pennsylvanians also comprised the largest proportion of the state's Marketable Day-Trip segment in 2017.
- New York, New Jersey, Ohio, and Maryland remained the top four out-of-state markets together accounting for 42% of the state's Marketable Overnight travelers in 2017.
- Pennsylvania and these same four states accounted for 87% of the state's Marketable Day-Trip travelers in 2017 – a slight increase from the prior two years.
- Pennsylvania's overnight business travelers came from a wider geographic area than the state's leisure travelers in 2017, with Pennsylvania residents continuing to account for 27% of the segment's total and New York, New Jersey, Ohio, Massachusetts, and Virginia also continuing to account for the same percentage (33%) as in 2016.

# Executive Summary – Where Do Travelers Like to Go In Pennsylvania?



***The major urban centers of Philadelphia and Pittsburgh continued to be the leading destinations for both overnight and day-trip travelers in 2017.***

- As in prior years, Philadelphia and The Countryside remained PA's top destination region for total (i.e., business, leisure and VFR) overnight and day-trip travel among the state's 11 tourism regions, followed by Pittsburgh and Its Countryside, Dutch Country Roads, and the Pocono Mountains regions.
- The Pocono Mountains and Dutch Country Roads regions were leading destinations for marketable overnight leisure trips in 2017, followed by Philadelphia and The Countryside and Pittsburgh and Its Countryside regions.
- As in prior years, with their large population bases and as economically diverse business hubs, the Philadelphia and The Countryside and Pittsburgh and Its Countryside regions once again hosted the largest number of VFR (visiting friends and relatives) and business travelers in 2017.

# Executive Summary – What Do Travelers Like to Do on Their PA Trip?



***Pennsylvania's vacation travelers enjoyed a wide range of activities in 2017, with shopping, historic sites, scenic drives, and cultural activities and attractions remaining among the most popular.***

- Almost a third of Pennsylvania's marketable overnight travelers went shopping (including outlet and "unique" shopping) in 2017, while 20% visited a historic site or landmark and 12% took a scenic drive.
- As in previous years, there were clear differences in the types of activities depending on the presence or absence of children on the trip. Marketable overnight and day-trip travelers without children along were far more likely to go to a bar or club, enjoy fine dining experiences, and/or visit a casino, or while those traveling with children were far more likely to visit an amusement or waterpark or zoo, and/or enjoy outdoor activities such as swimming, fishing, and camping.



# Executive Summary – When and How Travelers Plan Their PA Trip



***As in prior years, the trip planning cycle continued to be short and the internet remained the top planning tool for travelers to/within Pennsylvania in 2017.***

- Thirty-five percent of Pennsylvania's marketable overnight leisure travelers planned their Pennsylvania trip within a month or less of traveling and 10% did no advance planning before hitting the road. In general, the shorter the trip, the shorter the planning horizon.
- Over 45% of Pennsylvania's marketable overnight leisure travelers used the internet to plan their 2017 trip, while 16% relied on personal experience, 15% received advice from friends/relatives, and 12% used social media.
- Planning where to stay was by far the main reason Pennsylvania's marketable overnight leisure travelers used the internet in 2016, with 47% using the internet to research lodging options; 30% for maps/directions; 29% to find out about local activities/attractions; and 24% for info on restaurants.
- In terms of technology, marketable overnight travelers were far more likely to use a laptop (47%) or desktop (43%) to plan their 2017 Pennsylvania trip, but turned to their smartphone (72%) and, to a lesser extent, tablet (26%) or laptop (26%) during the trip.

# Executive Summary – Pennsylvania Travelers and Social Media Use



***Travelers are highly engaged in social media but with clear differences based on age; younger travelers often post pictures and news of their travels while older travelers are more apt to read travel reviews posted on a website.***

- Close to 71% of Pennsylvania's marketable overnight leisure travelers used social media for travel-related purposes in 2017 – a rate just slightly below the U.S. average.
- As in prior years, travelers in the younger age groups were far more likely to “tweet” and use social media before, during, and after their trips than older travelers, i.e., almost 80% of travelers under 45 years of age used social media vs. 56% aged 65 or above.
- Overnight leisure travelers under age 45 use social media to post and view travel-related photos/videos and find travel deals, events, and promotions, while older travelers were more likely to use social media to read and post online travel reviews, but at rates well below those of the other age groups.

# Executive Summary – Main Trip Features



***Short getaways with family or close friends and stays at hotels/motels continued to be among the most common features of trips taken by Pennsylvania's marketable overnight travelers in 2017.***

- Pennsylvania is clearly a “drive-to” destination with the vast majority of the state’s marketable overnight visitors arriving by car, van, small truck, or RV in 2017, with 70% traveling at least 100 miles to their Pennsylvania destination.
- Short stays continued to be the norm for the state’s marketable overnight travelers in 2017, with 64% spending just one or two nights on their Pennsylvania trip and 9 percent staying a week or longer.
- Almost three-quarters of the state’s marketable overnight travelers chose to stay in hotels or motels in 2017, with 12% staying at their second home or in housing owned by friends or relatives and 9% at a campground or trailer/RV park.
- Almost 60% of the state’s marketable overnight leisure visitors traveled with a spouse/partner in 2017 and 29% traveled with children.

# Executive Summary – What Travelers Look For in a Destination



***Travelers have clear priorities and expectations when deciding where to go on vacation or for a weekend getaway. Travelers' top priorities in 2017 included destinations that perceived as exciting, attractive for an adult vacation, and safe and worry-free.***

- Other top travel priorities of U.S. overnight travelers in 2017 were: family friendly, climate, with sightseeing opportunities, unique, and affordable.
- Once again, Pennsylvania scored well on each of the top priorities, with two-thirds to nearly three-quarters of the state's overnight leisure travelers agreeing that their 2017 Pennsylvania trip experience largely met each of these top priorities.
- In addition to the list of travel priorities, there are certain images associated with a destination. Pennsylvania's image strengths among 2017 visitors included its well-known landmarks, access, being a place visitors feel welcome, a good place for adult and family vacations, as well as a place with lots to see and do, with authentic historical sites, within good proximity, and offering a fun vacation getaway. As in prior years, Pennsylvania residents rated the state more favorably than non-resident travelers who visited the state.

# Executive Summary – Main Benefits from PA Leisure Trip



***Research continues to show that taking a leisure trip purely for fun offers a number of benefits to individuals' overall health and well-being.***

- As in prior years, Pennsylvania's marketable overnight and day-trip leisure travelers believed relaxation/stress relief to be the primary benefit of their Pennsylvania trip in 2017. This was cited by 60% of overnight travelers and 58% of day-trippers, with "a break from day-to-day responsibilities" continuing to rank second.
- Creating lasting memories and improving and enriching personal relationships with family and/or friends also remained among the key benefits cited by travelers who visited Pennsylvania in 2017, as well as having no fixed schedule.
- Visiting places never seen before, arriving home with great stories, and being either physically or intellectually challenged were of less importance for the state's marketable overnight and day-trip travelers in 2017.

# Detailed Findings

# **U.S. Overnight Visitor Volume, Market Segments, and Trip Types**

# Size and Structure of the U.S. Domestic Overnight Travel Market



***U.S. overnight visitor volume continued to increase in 2017 to more than 1.6 billion travelers, with the 2.1% rate of increase nearly double that of the previous year.***

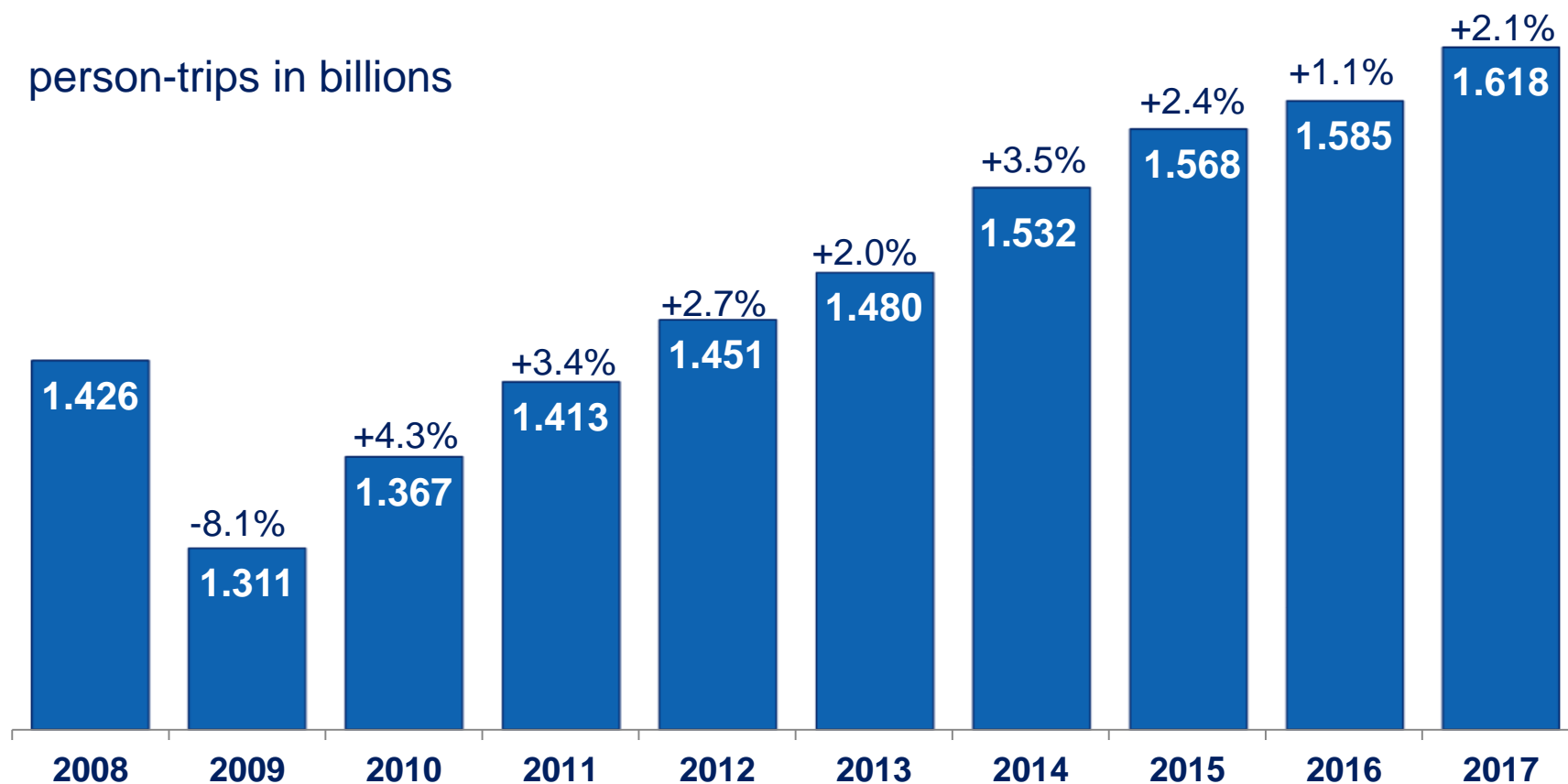
- Overnight travel by U.S. residents rose 2.1% to nearly 1.62 billion travelers in 2017. The year-over-year growth was a full percentage point higher than in 2016, but still below the 2.4% rate of increase in 2015 and the 3.5% increase seen in 2014.
- Of the nearly 1.62 billion overnight trips taken by U.S. travelers in 2017, 86% were for leisure purposes – either to visit friends and/or relatives (VFR) or for purely vacation/getaway weekend trips that may be influenced by marketing (i.e., “marketable”) – down 2 percentage points from 2016.
- Business trips accounted for 10% of the overnight trips taken by U.S. travelers in 2017, while an additional 4% were combined business-leisure trips.
- As in prior years, the top trip types for U.S. marketable overnight travelers in 2017 were: touring, special event, outdoor, city, resort, and casino trips.



# U.S. Overnight Visitor Volume 2008 to 2017



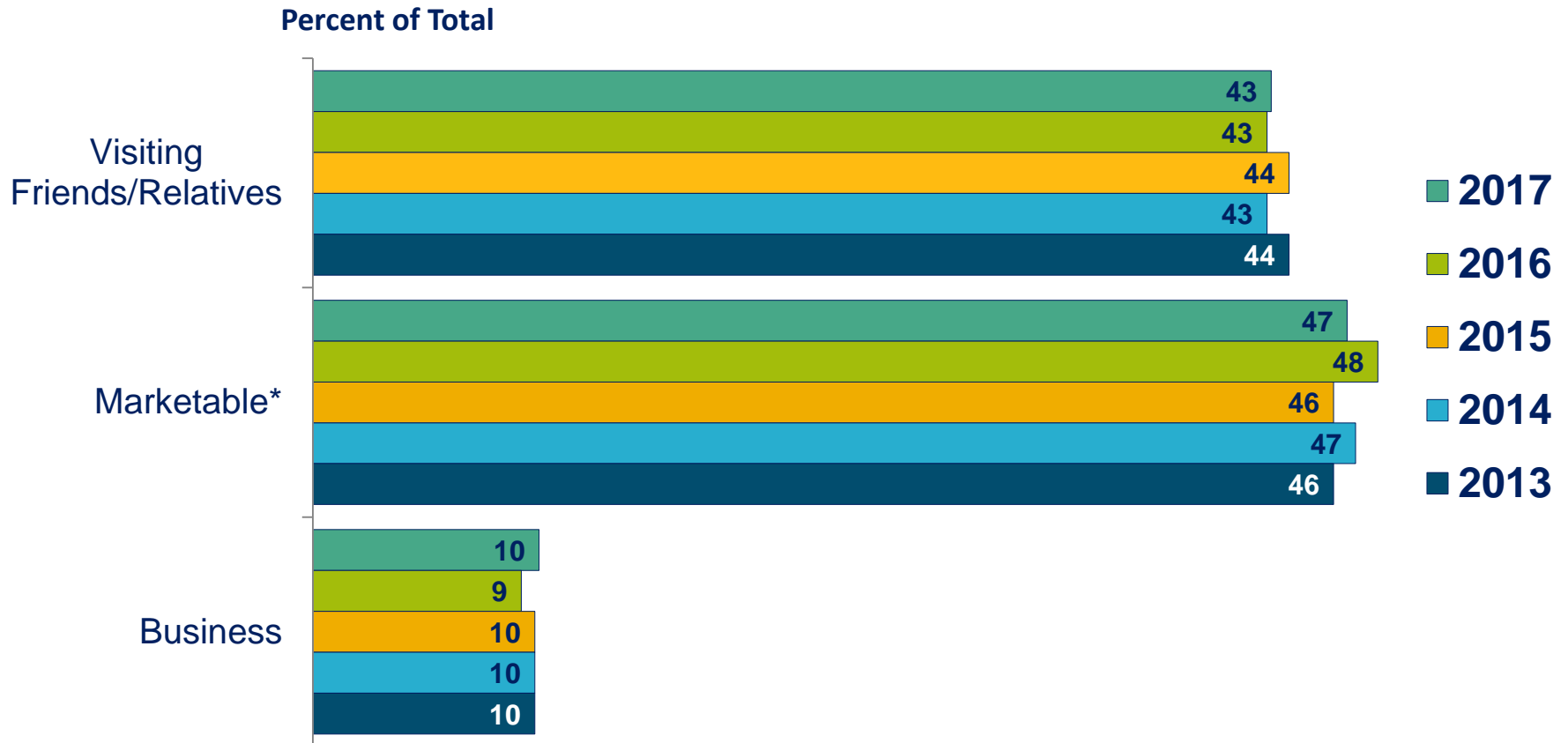
Base: Overnight Person-Trips



# Structure of U.S. Overnight Travel 2013 - 2017



Base: Overnight Trips

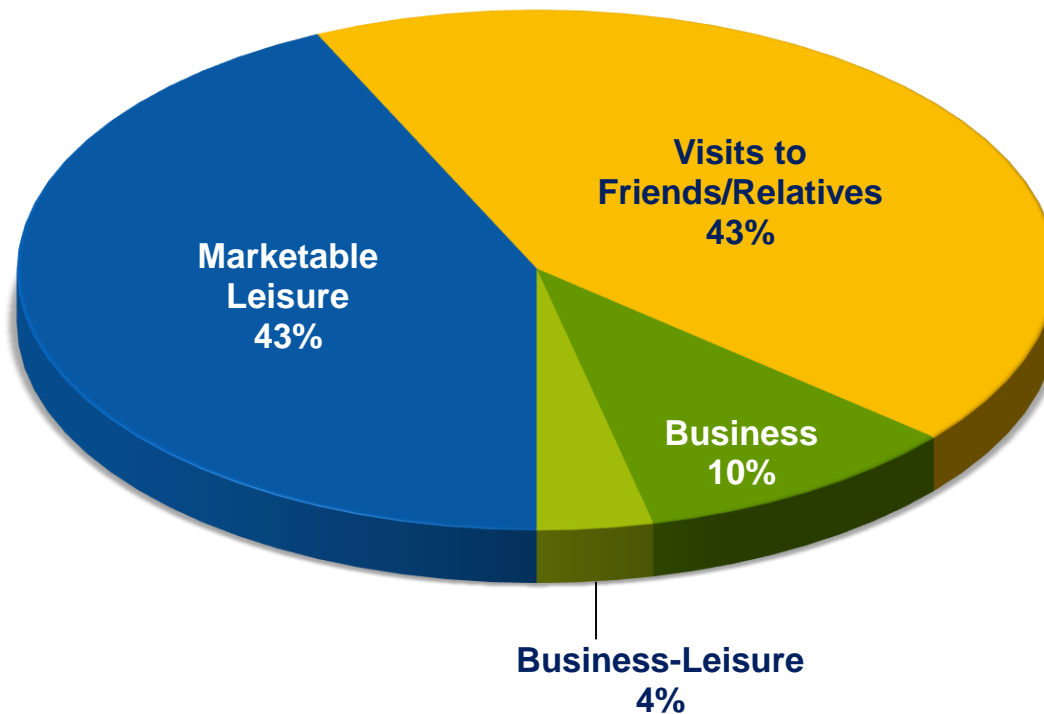


\*Business-Leisure trips are included in Marketable trips in this slide.

# U.S. 2017 Overnight Market Segments



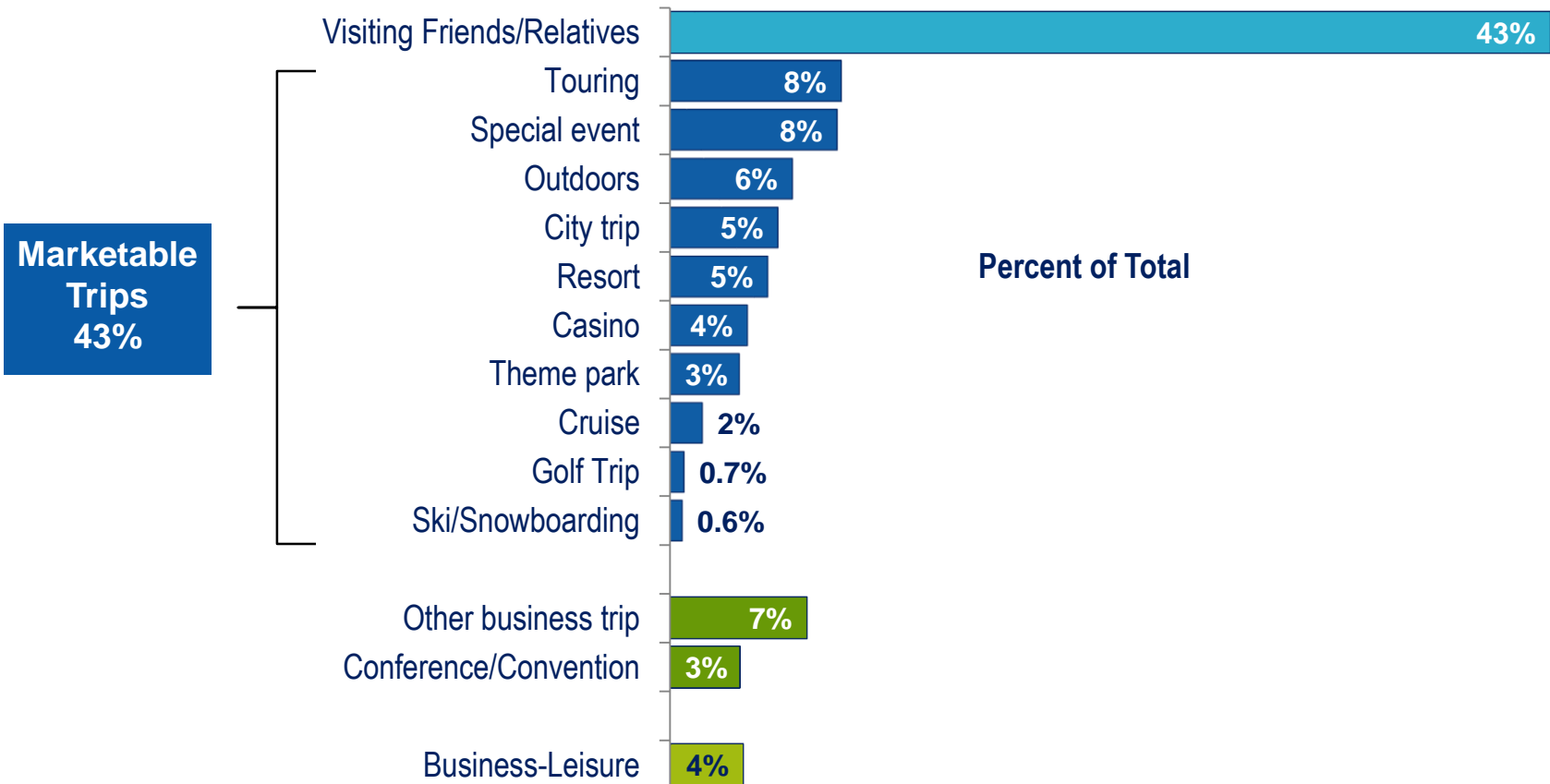
Base: Adult Overnight Trips



# Main Purpose of U.S. Overnight Trips in 2017



Base: Adult Overnight Trips



# **Pennsylvania Visitor Volume, Market Segments, and Trip Types**

# Pennsylvania Visitor Volume



- Pennsylvania hosted an estimated 202.1 million travelers (*as measured in person-trips*) from throughout the U.S. in 2017.

*Of these, an estimated 69.6 million (or 34%) were overnight trips – the same percentage as in the previous three years.*

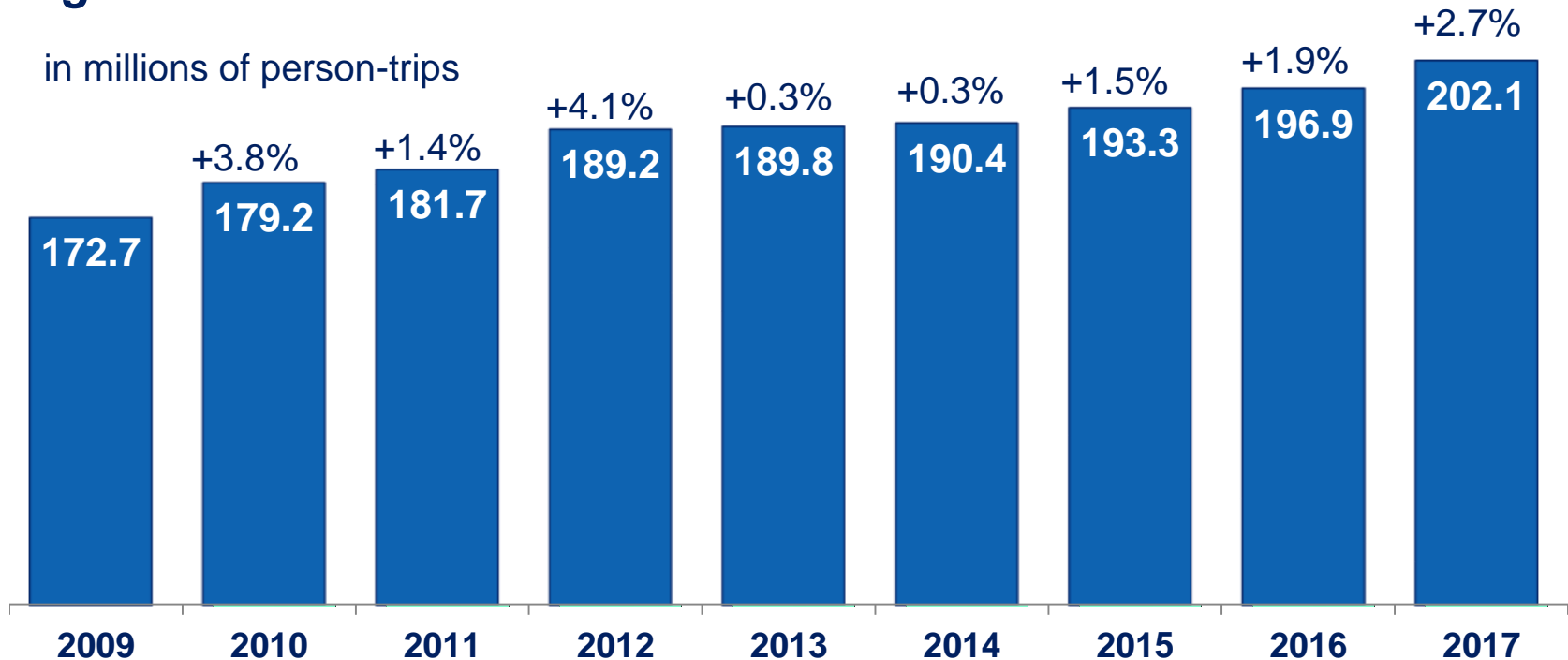
- Marketable trip types are trips that can be influenced by marketing, i.e., leisure trips for purely vacation or getaway reasons and that exclude travel whose main purpose is to visit friends and/or relatives (VFR). Of the estimated 69.6 million overnight trips in Pennsylvania in 2017, 40% could be considered marketable trips – a 1 percentage point increase from 2016 and three percentage points below the U.S. average.
- As in prior years, special events, touring, and outdoors remained the top three marketable trip types for Pennsylvania overnight travelers in 2017.
- Visiting Friends/Relatives (VFR) accounted for 46% of PA's overnight travel in 2017, once again remaining above the U.S. average (43%).

# Pennsylvania Total Visitor Volume 2009 to 2017



Base: Total Overnight + Day-Trip Person-Trips

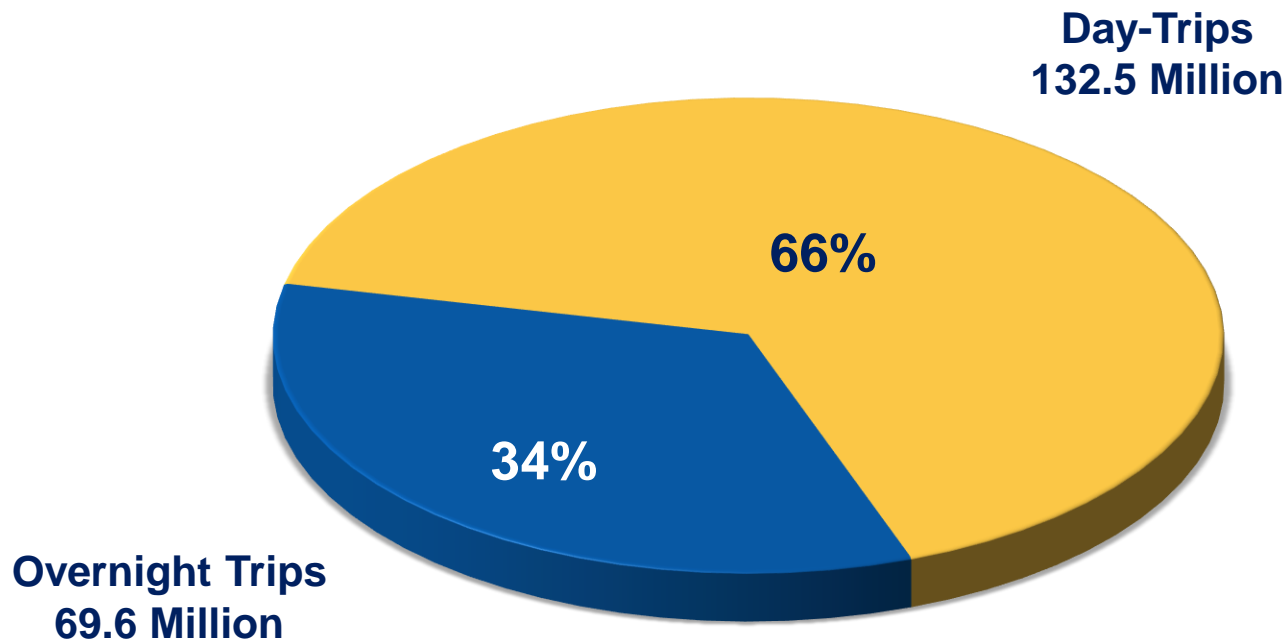
***Pennsylvania hosted a record number of travelers in 2017. The 2.7% growth rate was well above that of the past several years and the U.S. average for 2017.***



# Total Trips to Pennsylvania in 2017



**Total Person-Trips = 202.1 Million**





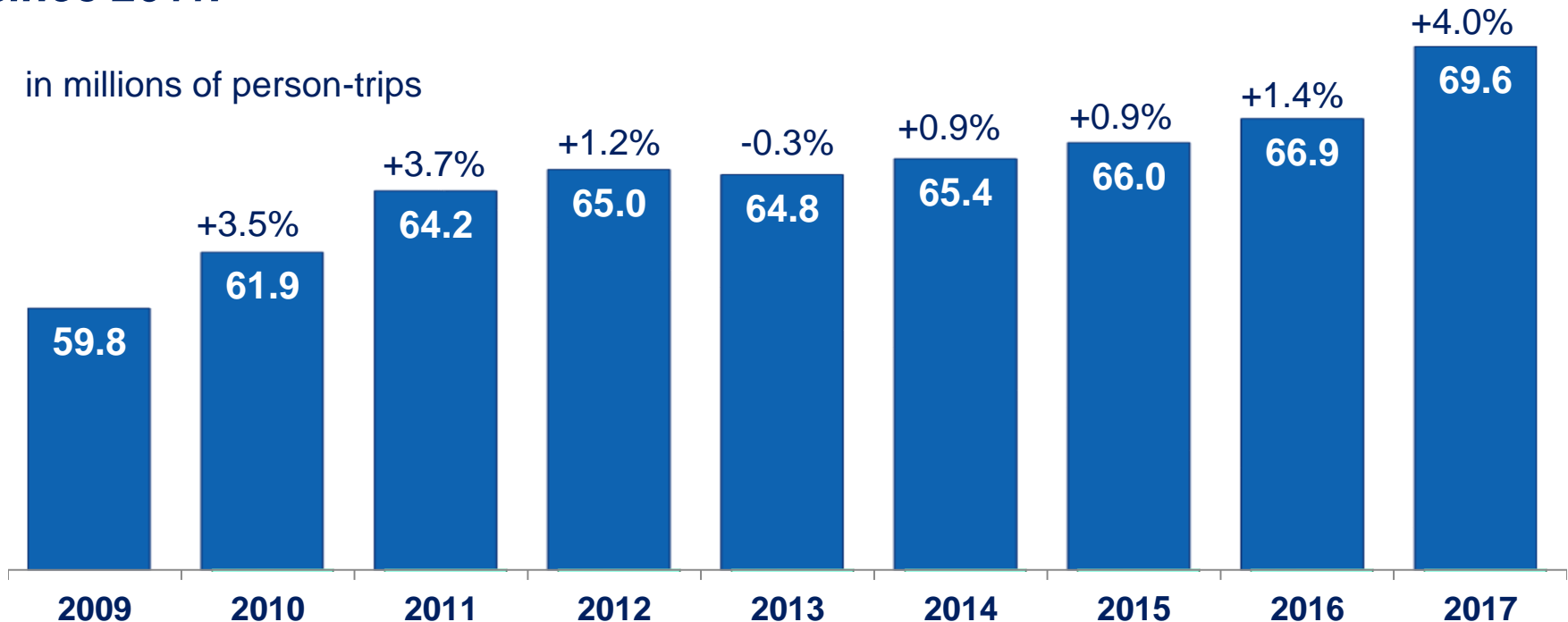
# Pennsylvania Overnight Visitor Volume 2009 to 2017



Base: Total Overnight Person-Trips

***Pennsylvania hosted a record number of overnight travelers in 2017, with a growth rate that surpassed the 1.1% U.S. average and was the strongest since 2011.***

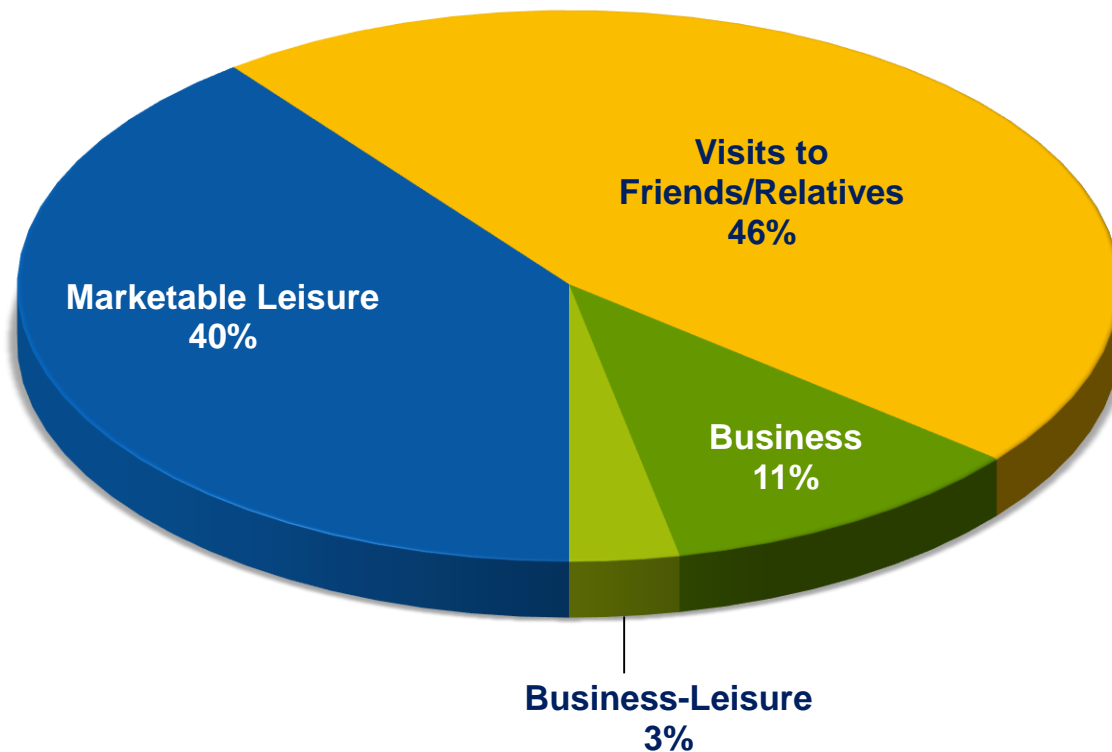
in millions of person-trips



# Pennsylvania 2017 Overnight Travel Market Segments



Base: Adult Overnight Trips to Pennsylvania



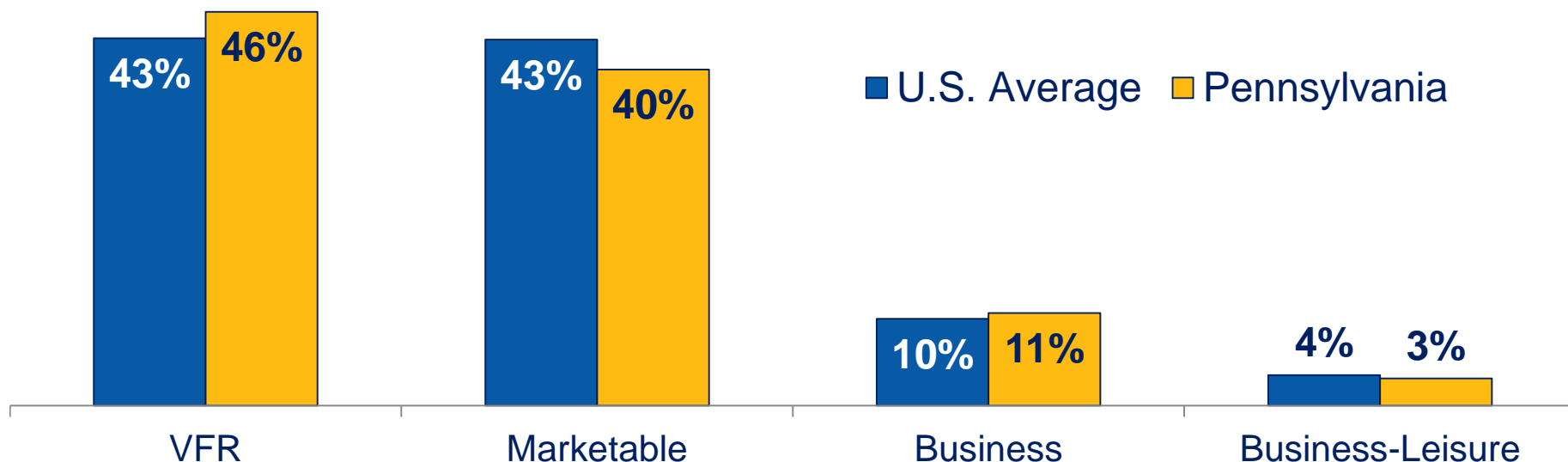
# Comparison of Pennsylvania and U.S. Overnight Market Segments, 2017



Base: Adult Overnight Trips

***As in prior years, travelers were more likely to travel to/within Pennsylvania to visit friends and relatives (VFR) than travelers nationwide.***

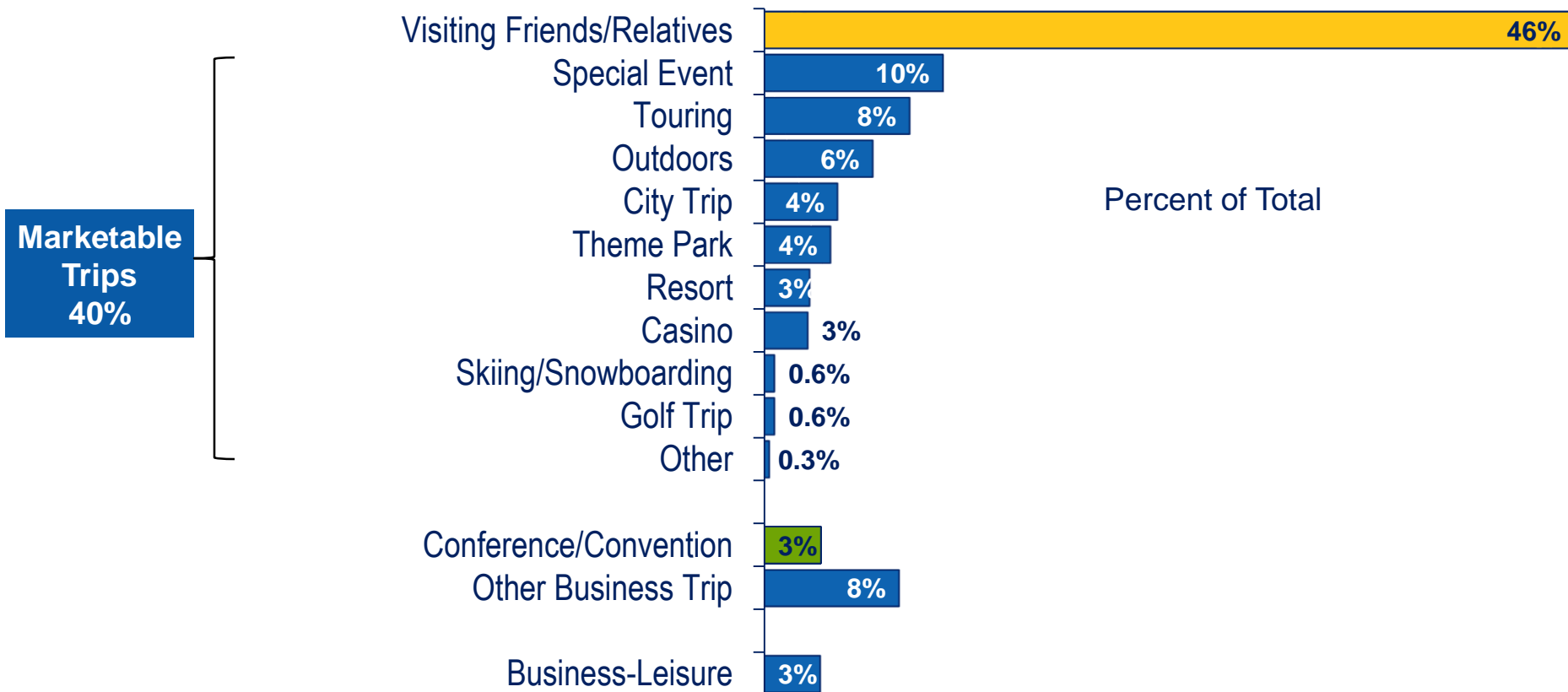
2017 Overnight Travel, Main Purpose of Stay  
Pennsylvania vs. U.S. Average, Percent of Total Travelers



# Main Purpose of Overnight Trips To/Within Pennsylvania in 2017



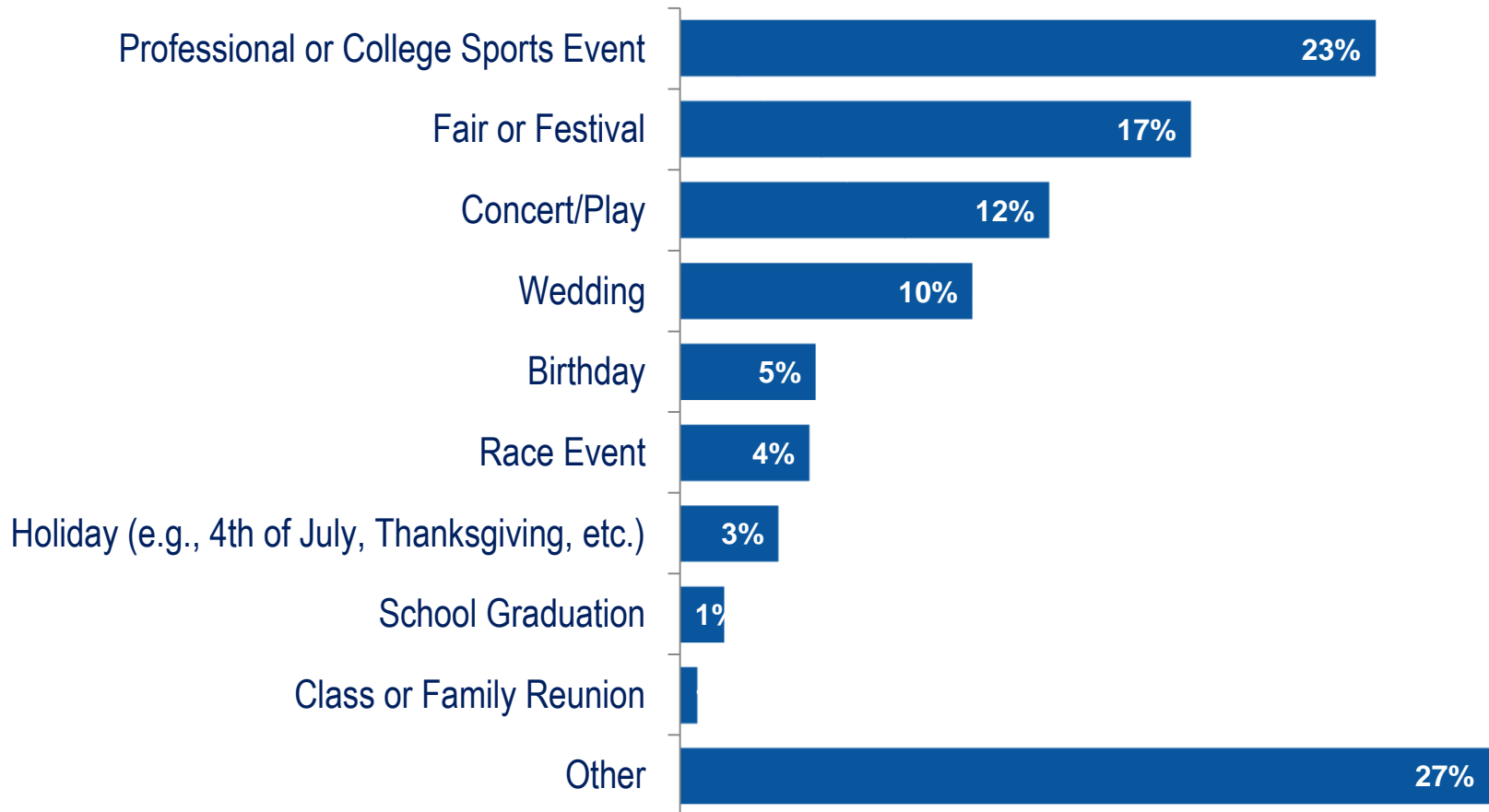
Base: Overnight Trips



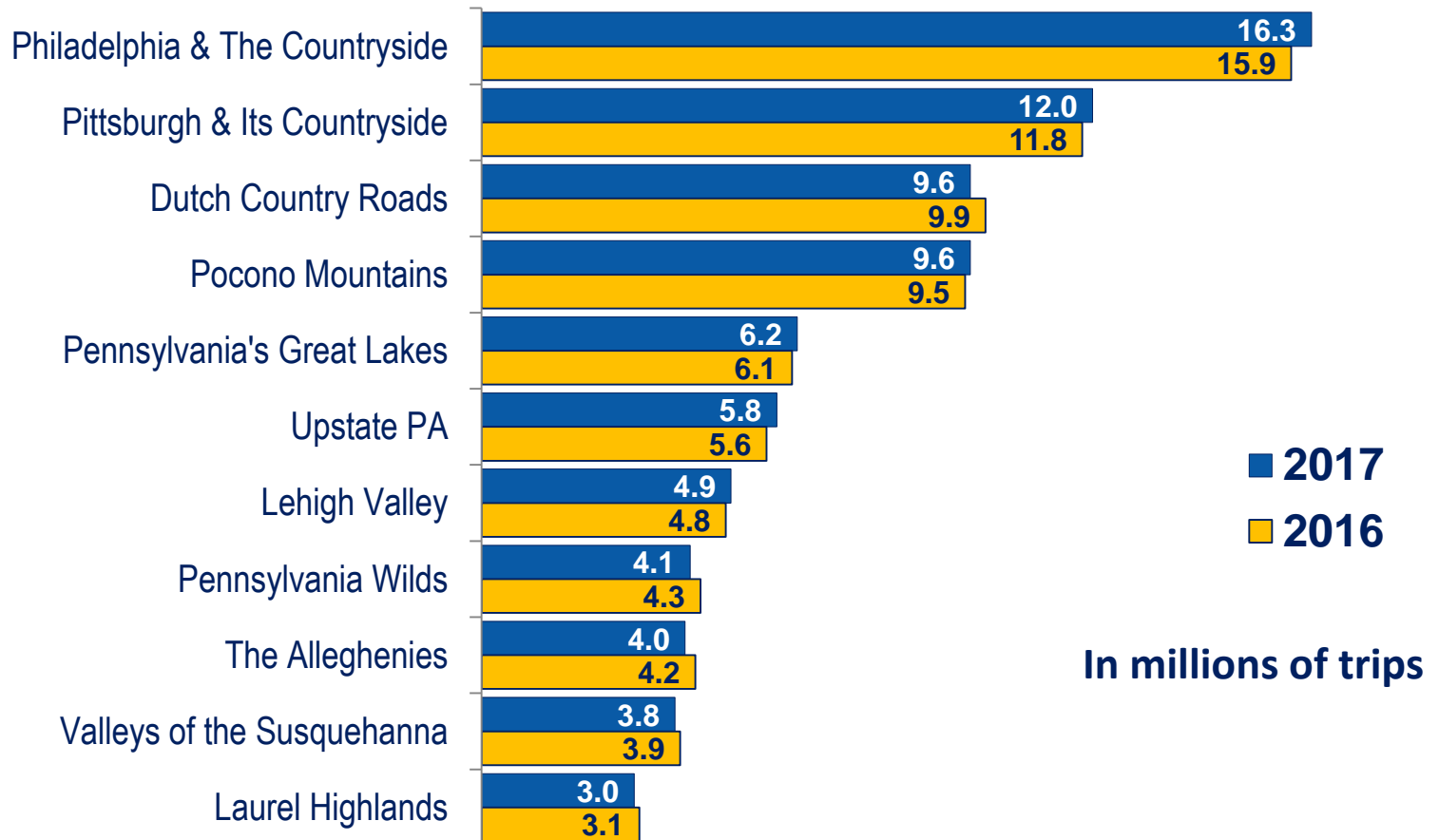
# Pennsylvania Overnight Travel 2017 Special Event Trip



Base: Adult Overnight Trips to Pennsylvania



# Pennsylvania Regions Visited on Overnight Trips\*



\*Spent time in region. Figures reflect both business and leisure travelers, including those visiting friends and family.  
Total exceeds state total as a number of travelers visited more than one region.

# Pennsylvania 2017 Visitor Volume

## Day-Trip Travelers



- Pennsylvania hosted an estimated 132.5 million day-trip travelers in 2017.
- Of these, 55% were marketable trip types (a much higher percentage than the overnight segment and the same percentage as in the previous three years).
- Touring, special events, and shopping remained the three top marketable trip types for day-trip travelers in 2017, followed by the outdoors, city trips, casinos, and theme parks.

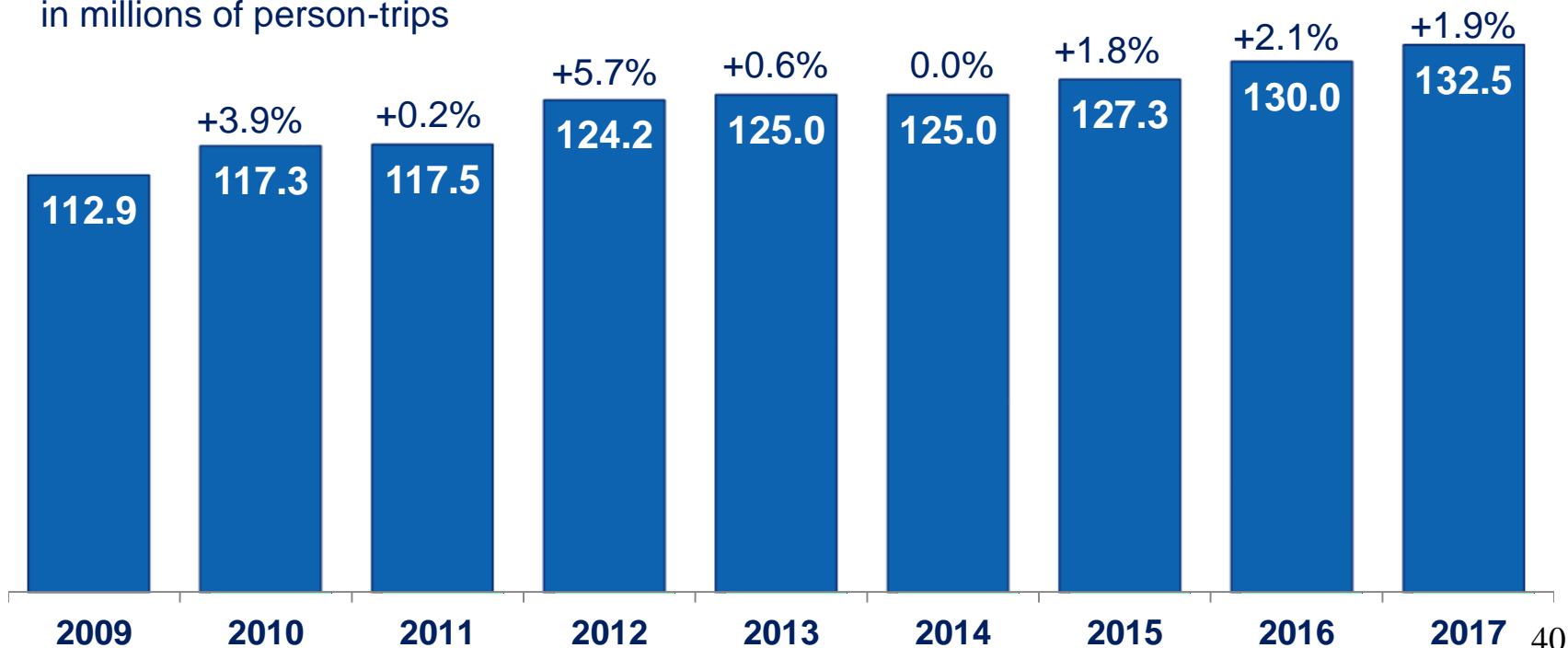
# Pennsylvania Day-Trip Visitor Volume 2009 to 2017



Base: Pennsylvania Day-Trips

***Pennsylvania hosted a record number of day-trip travelers in 2017. The number of day-trip travelers rose 17% between 2009 and 2017, slightly outpacing the 16% increase by the overnight segment.***

in millions of person-trips

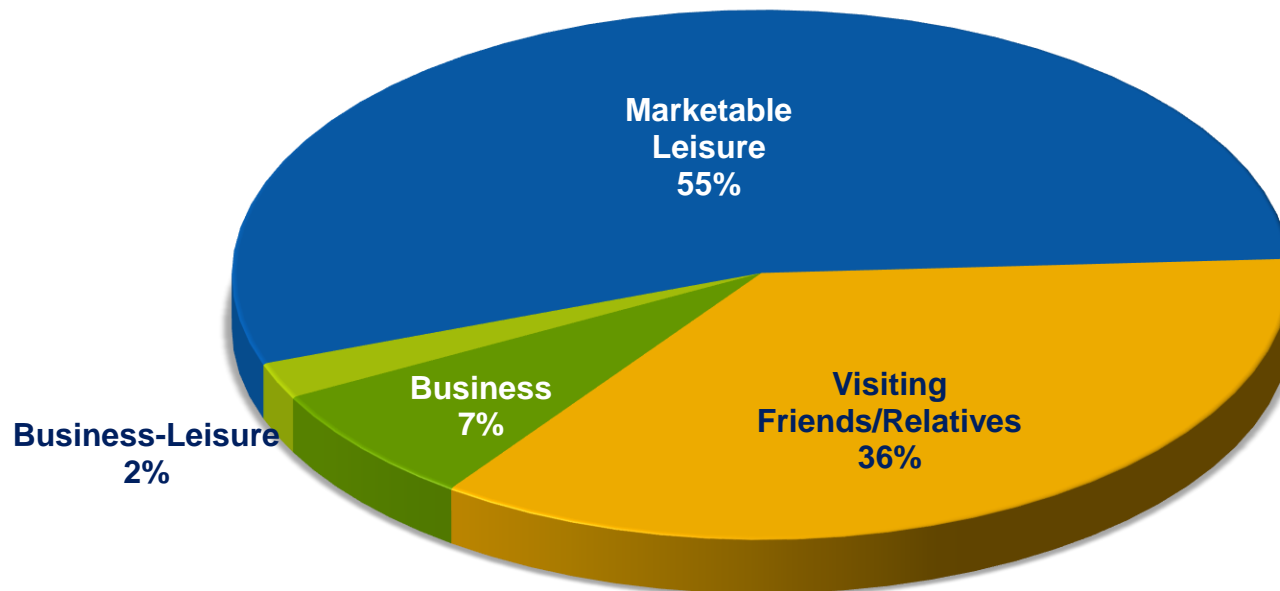




# Pennsylvania 2017 Day-Trip Market Segments



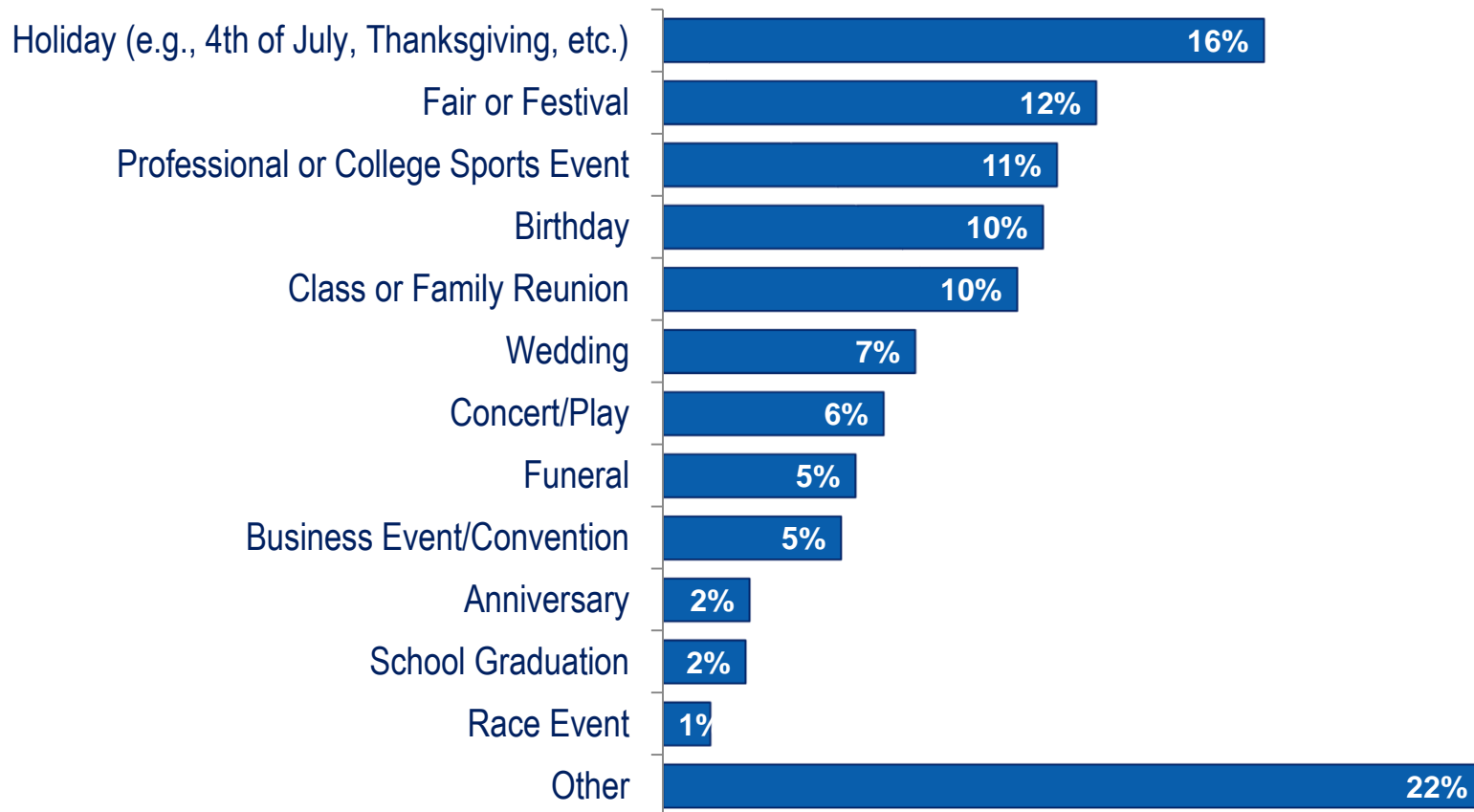
Base: Adult Day Person-Trips to Pennsylvania



# 2017 Special Event Trip Pennsylvania Day-Trip Travelers



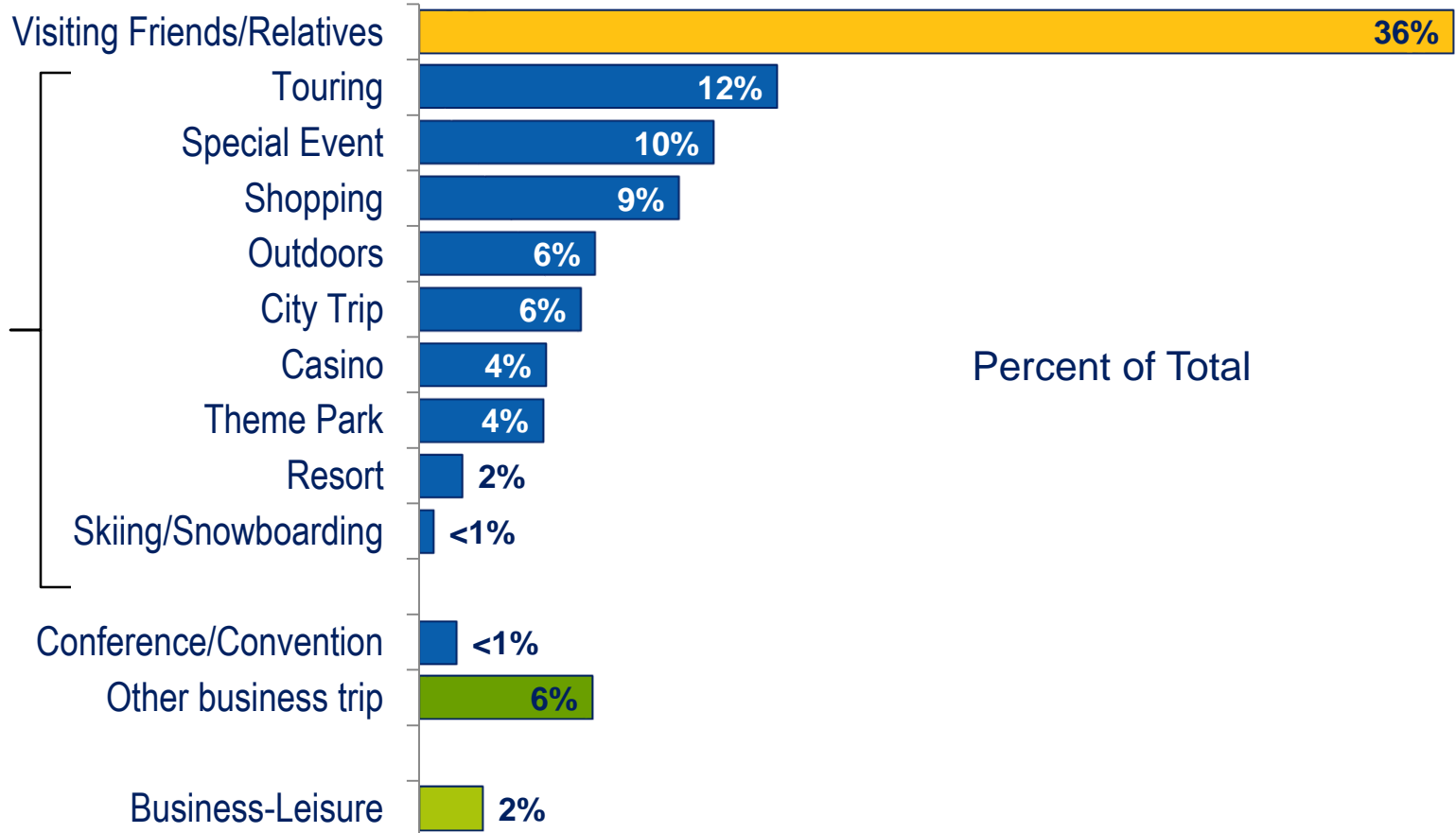
Base: Adult Day-Trips to Pennsylvania



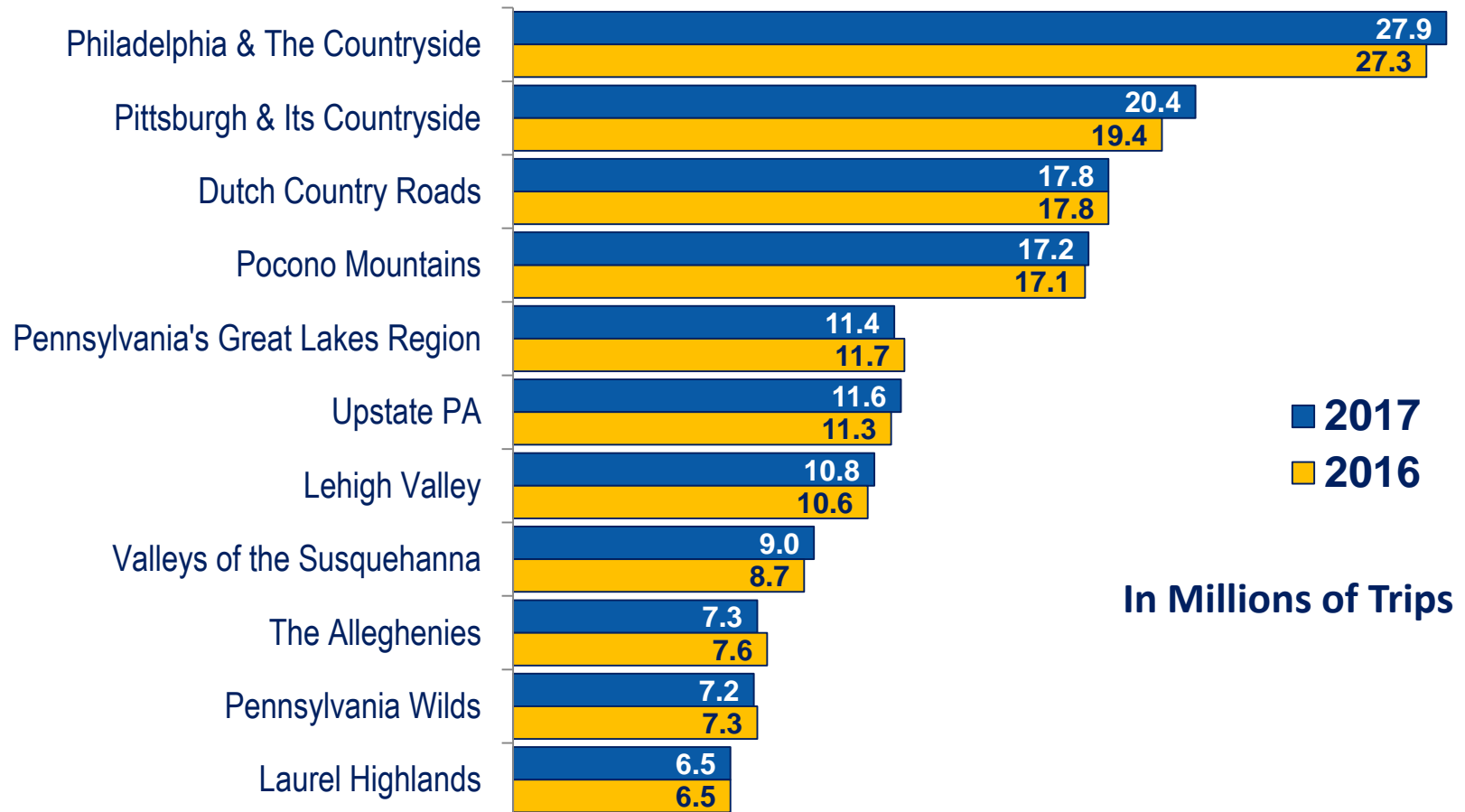
# Main Purpose for Pennsylvania Day-Trip, 2017



Base: Day-Trips



# Pennsylvania Regions Visited on Day-Trips\*



\*Spent time in region

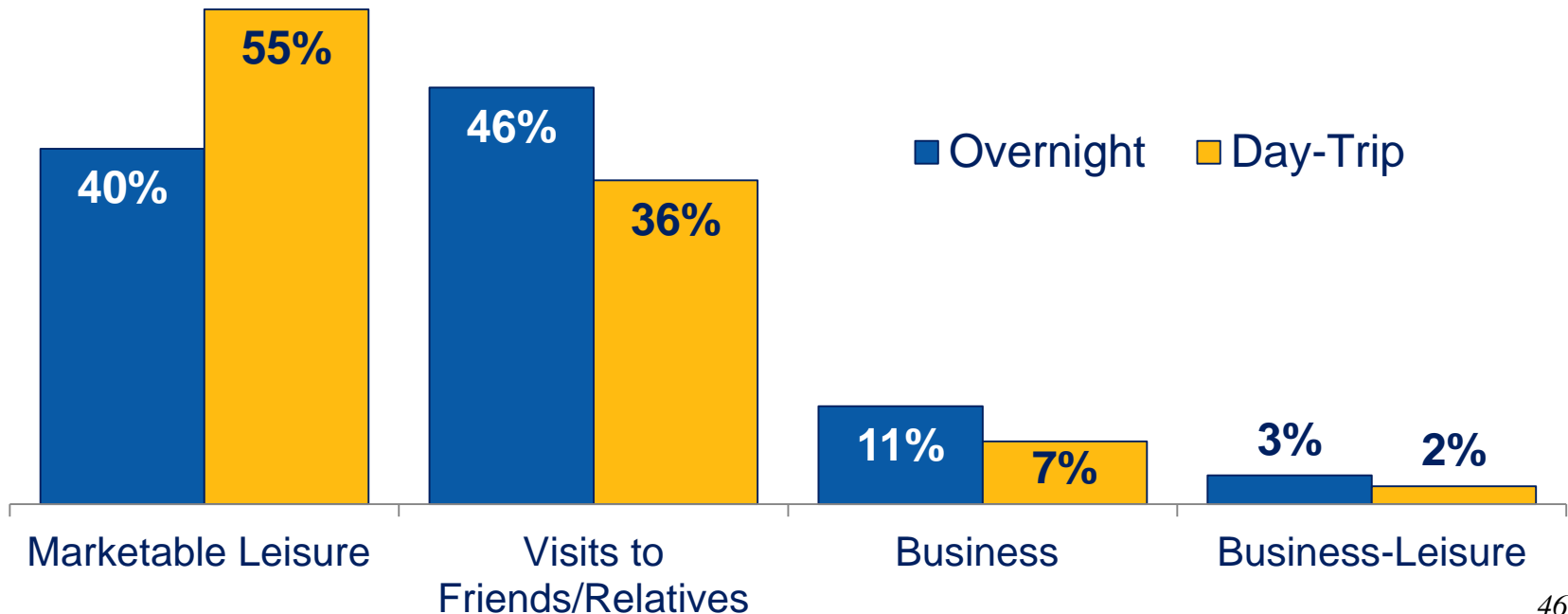
Total exceeds State total as a number of travelers visited more than one region.

# **Comparison of Pennsylvania Overnight and Day-Trips**

# Pennsylvania Purpose of Stay Overnight vs. Day-trip, 2017



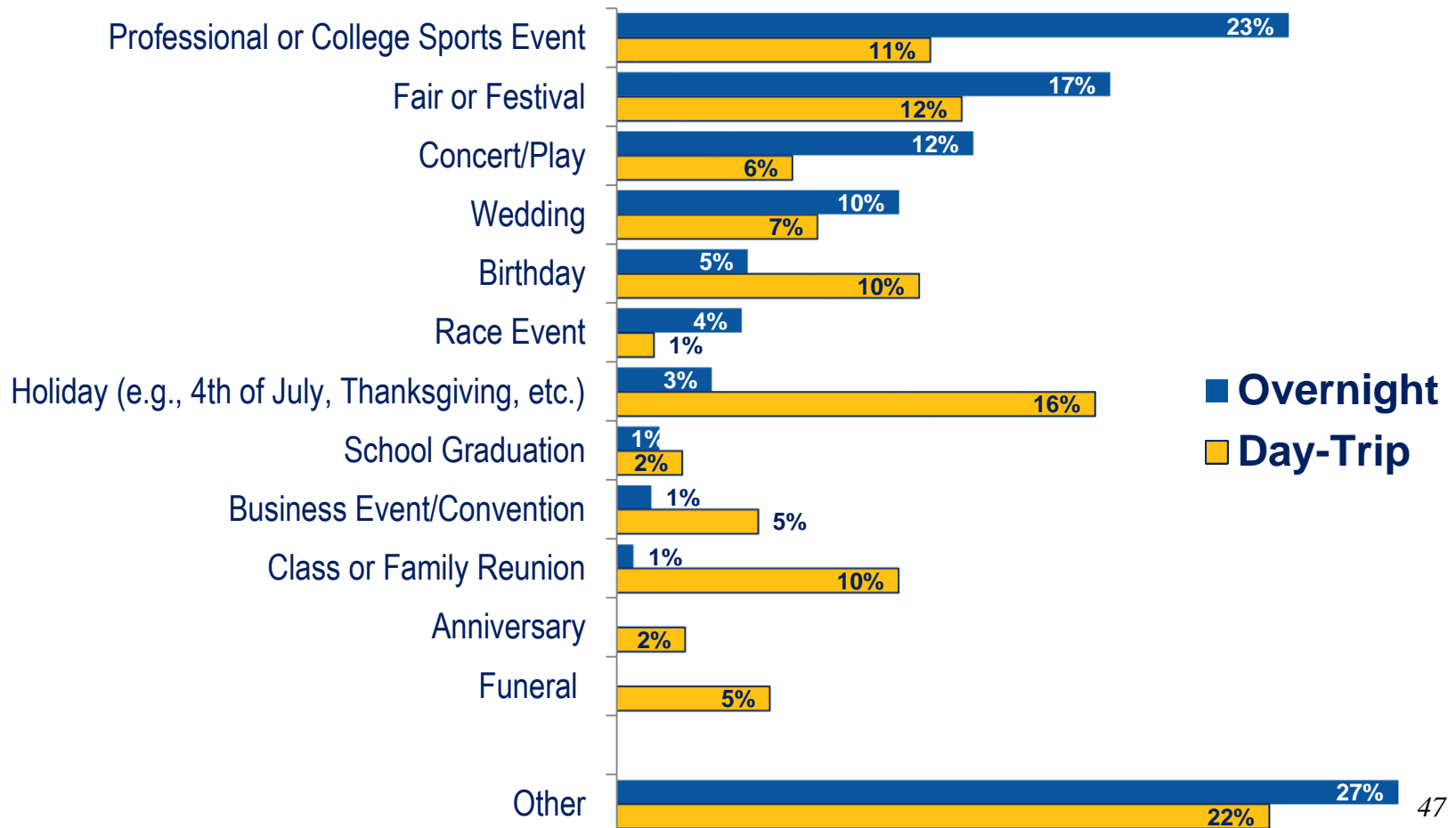
*The graph below illustrates the differences in the purpose of stay between PA's overnight and day-trip travelers in 2017. As in prior years, overnight travelers were more likely to travel to and/or within PA to visit friends/family, while day-trip travelers were far more likely to travel in the state for purely leisure (i.e., "marketable") reasons.*



# Pennsylvania Special Event Trips Overnight vs. Day-Trip Travelers, 2017



Base: Adult Overnight and Day-Trips to Pennsylvania



# **Pennsylvania Overnight Leisure Segments: Comparison of Market Segments by Age**

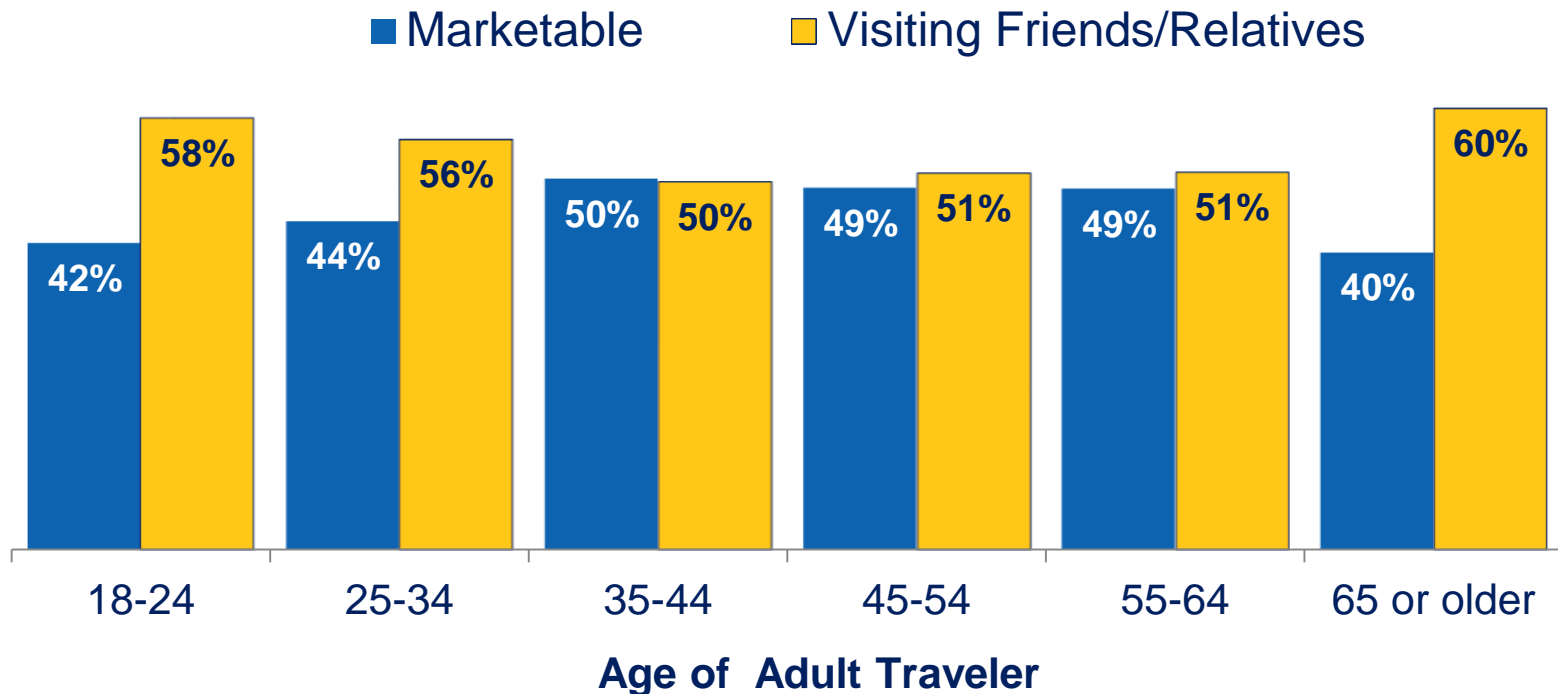


# Pennsylvania's Overnight Leisure Segments by Age of Adult Traveler, 2017



Base: Adult Leisure Overnight Trips to Pennsylvania

*Pennsylvania's youngest and oldest travelers were far more likely to visit the state to visit their friends and family than those in the middle age ranges.*



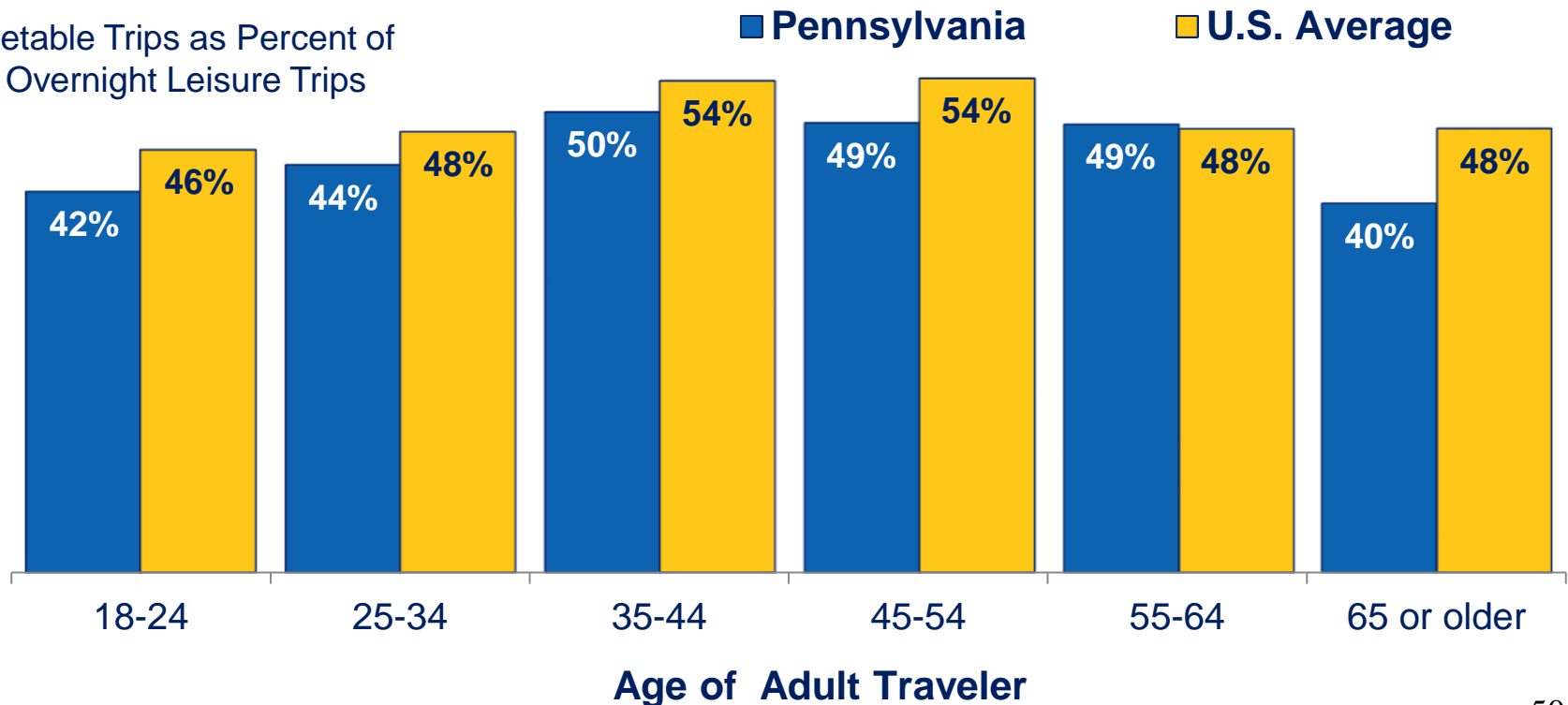
# PA & U.S. Marketable Overnight Leisure Segments by Age of Adult Traveler, 2017



Base: Adult Leisure Overnight Trips

*Pennsylvania for the most part hosted a smaller percentage of visitors traveling for purely leisure (marketable) reasons in 2017 than the U.S. average, regardless of age.*

Marketable Trips as Percent of  
Total Overnight Leisure Trips



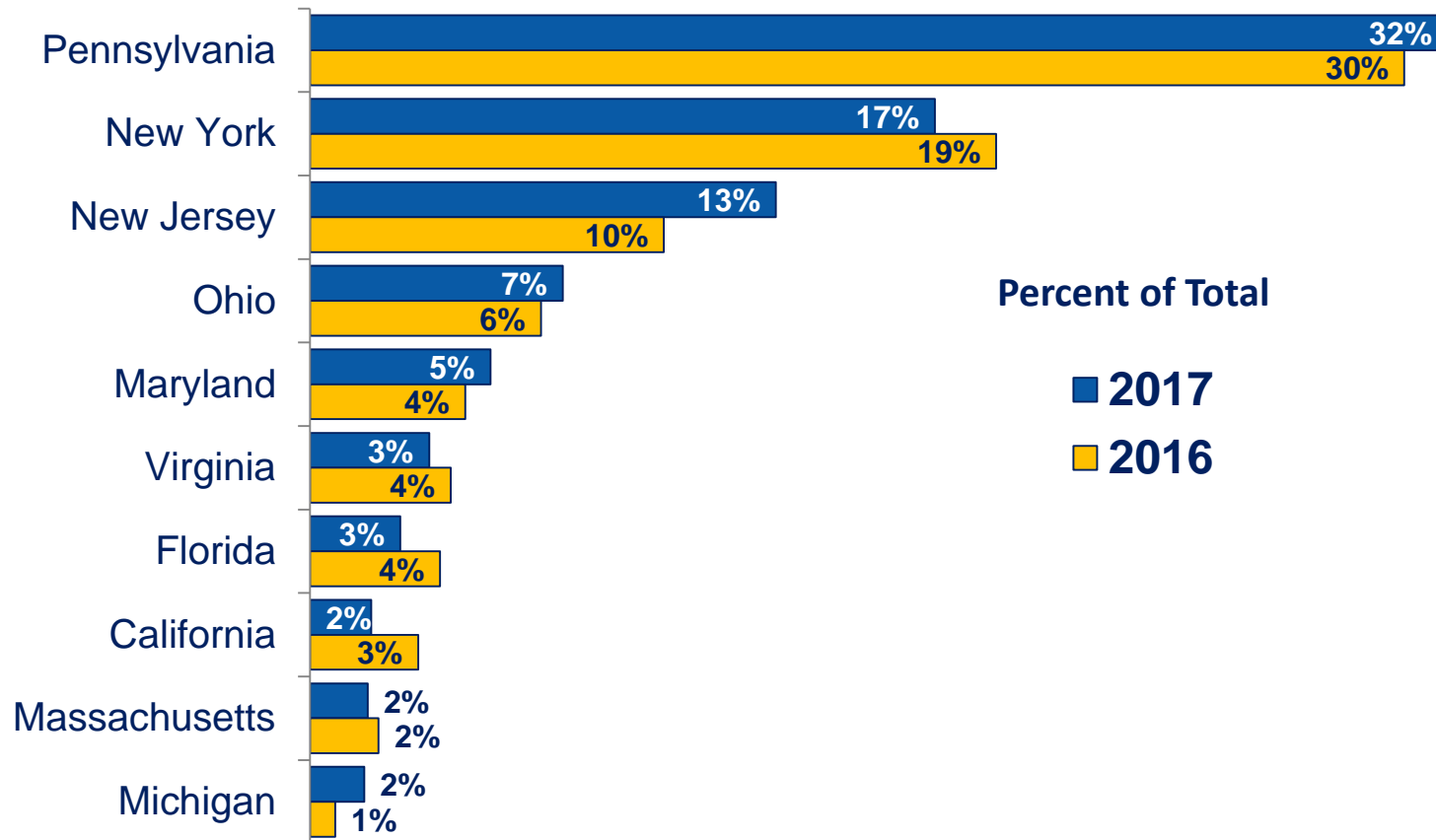
# **Pennsylvania's Marketable Overnight Travelers**

# **Main Origin Markets for Pennsylvania's Marketable Overnight Travelers**

# Main Origin States for Pennsylvania's Marketable Overnight Travelers



Base: Overnight Marketable Trips

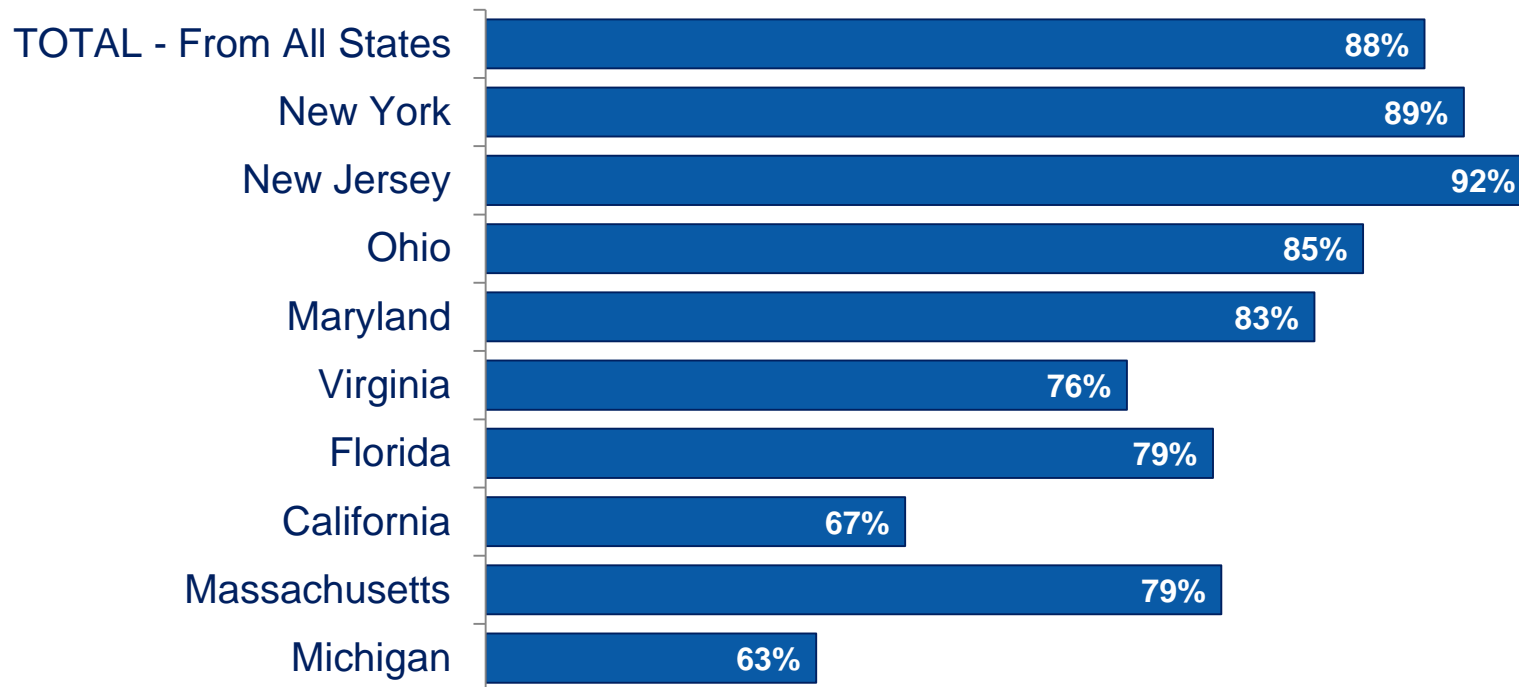


# Repeat Visits by Pennsylvania's Marketable Overnight Travelers From Main Origin Markets



Base: Overnight Marketable Trips

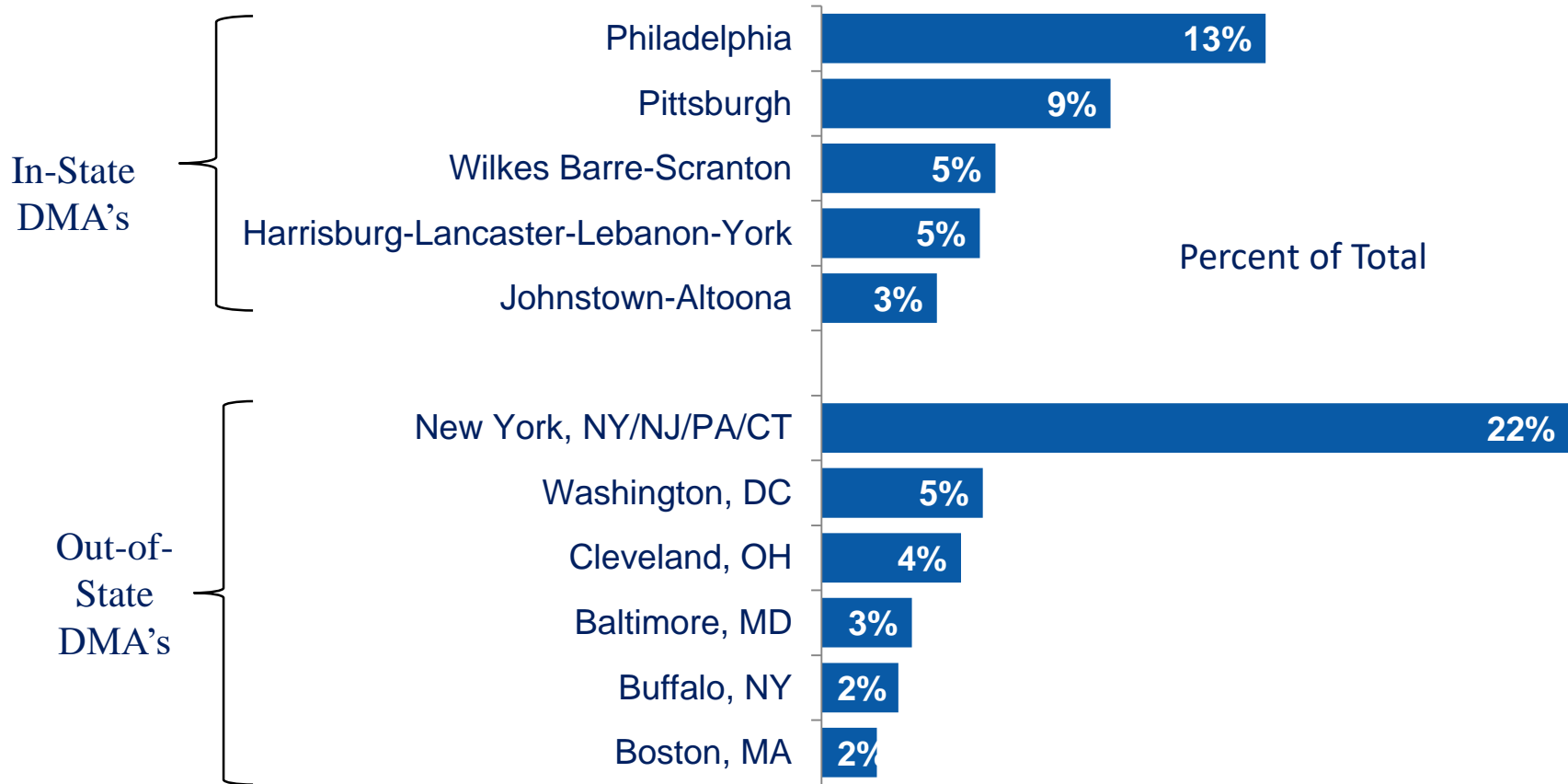
*Most travelers (88%) who visited Pennsylvania in 2017 for purely leisure (marketable) reasons had visited the state before, with the percentage varying by travelers' state of residence.*



# Main Urban Origin Markets for Pennsylvania's Marketable Overnight Travelers



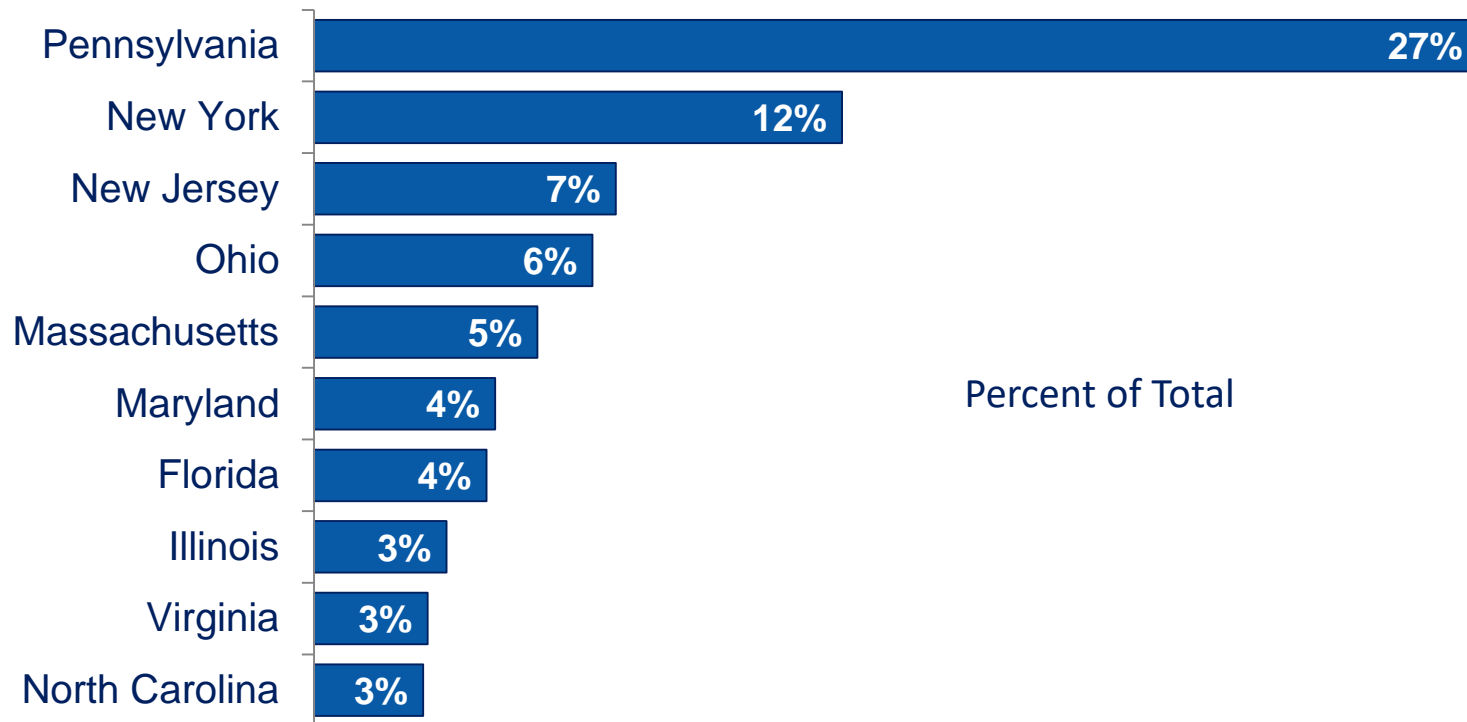
Base: Overnight Marketable Trips



# Main Origin States for Pennsylvania's Business\* Overnight Travelers



Base: Overnight Business Trips



\* Includes Business-Leisure Travel



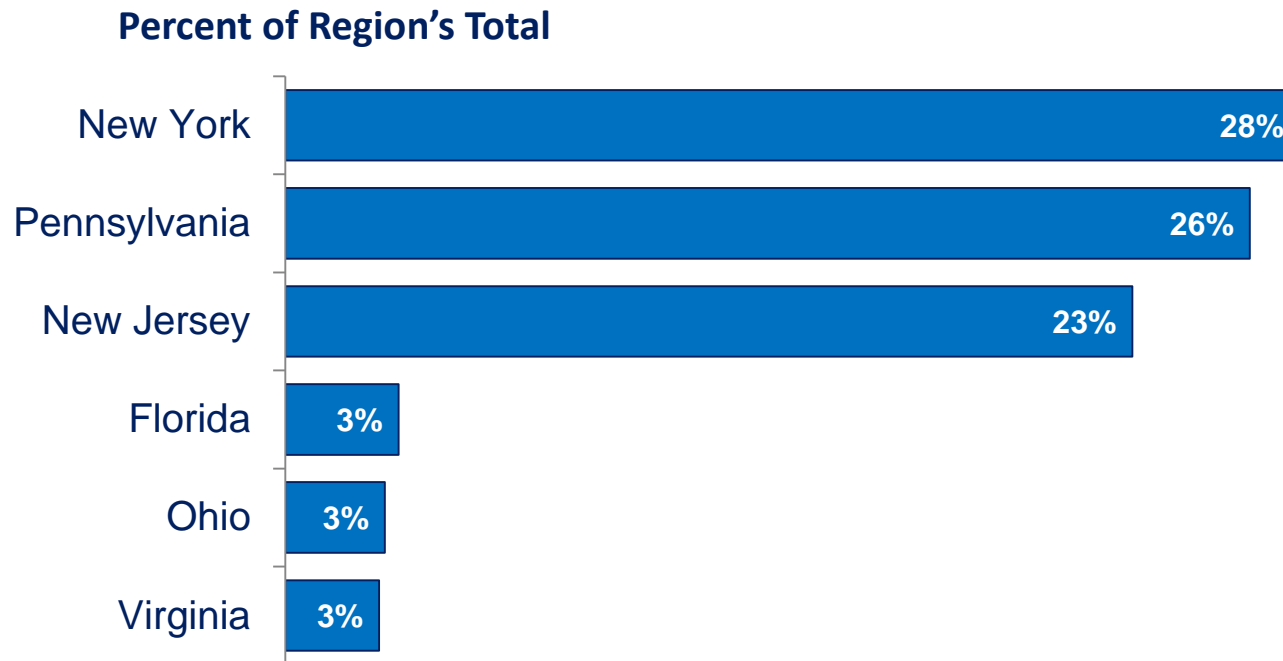
# **Main Origin States Pennsylvania Tourism Regions**

# Main Origin States for Overnight Travelers to Pocono Mountains Region



Base: Overnight Trips

*New York, Pennsylvania, and New Jersey remained the top origin markets for overnight travelers to the Pocono Mountains region in 2017 – together accounting for 77% of the region's total for overnight travelers.*

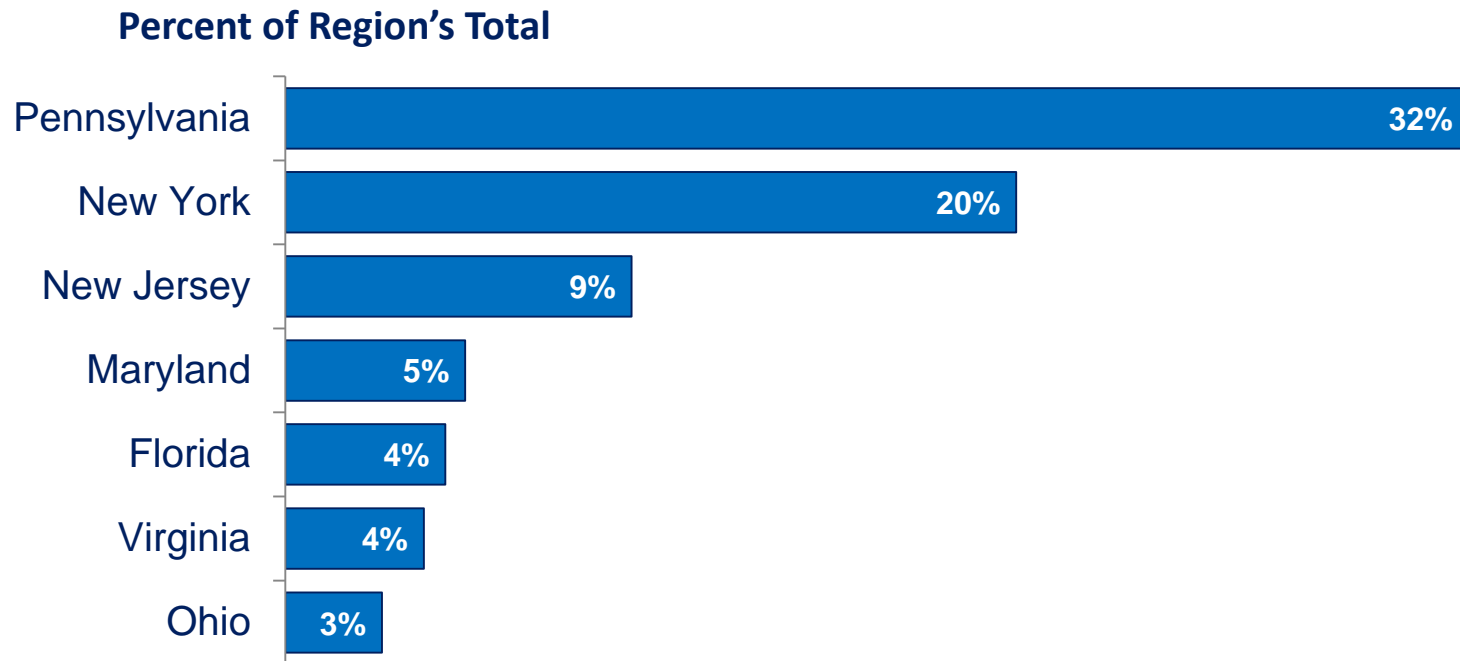


# Main Origin States for Overnight Travelers to Upstate PA Region



Base: Overnight Trips

*Pennsylvania and New York were the top origin markets for overnight travelers to the Upstate PA region in 2017 – together accounting for more than 50% of the region's total for overnight travelers.*

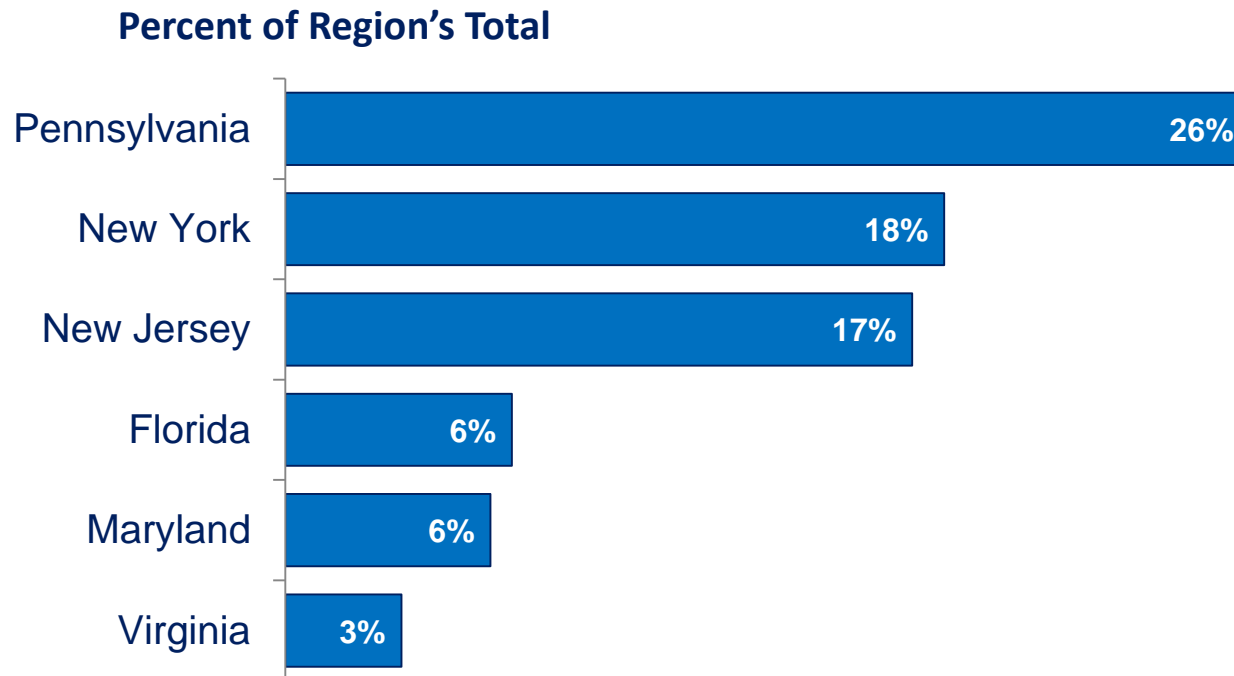


# Main Origin States for Overnight Travelers to Lehigh Valley Region



Base: Overnight Trips

*Pennsylvania, New York, and New Jersey were the top origin markets for overnight travelers to the Lehigh Valley region in 2017 – together accounting for over 60% of the region's total for overnight travelers.*

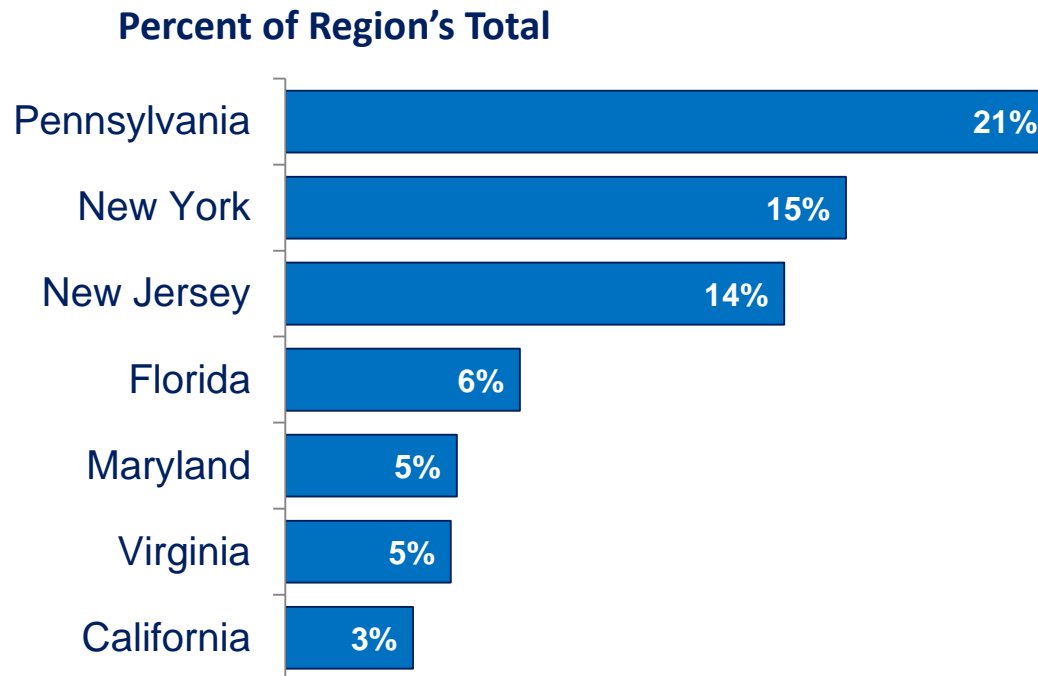


# Main Origin States for Overnight Travelers to Philadelphia and The Countryside Region



Base: Overnight Trips

*Pennsylvania, New York, and New Jersey remained the top origin markets for overnight travelers to the Philadelphia and The Countryside region in 2017 – together accounting for 50% of the region's total for overnight travelers.*

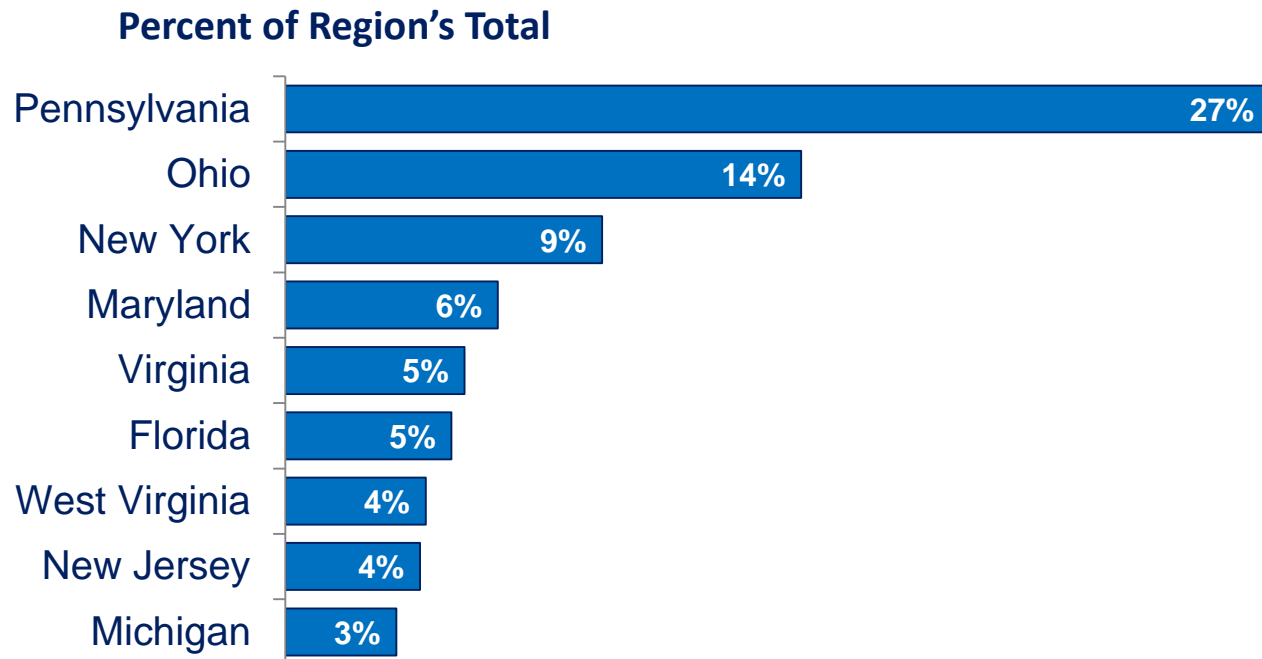


# Main Origin States for Overnight Travelers to Pittsburgh and Its Countryside Region



Base: Overnight Trips

*Pennsylvania, Ohio, and New York were the top origin markets for overnight travelers to Pittsburgh and Its Countryside region in 2017 – together accounting for half of the region's total for overnight travelers.*

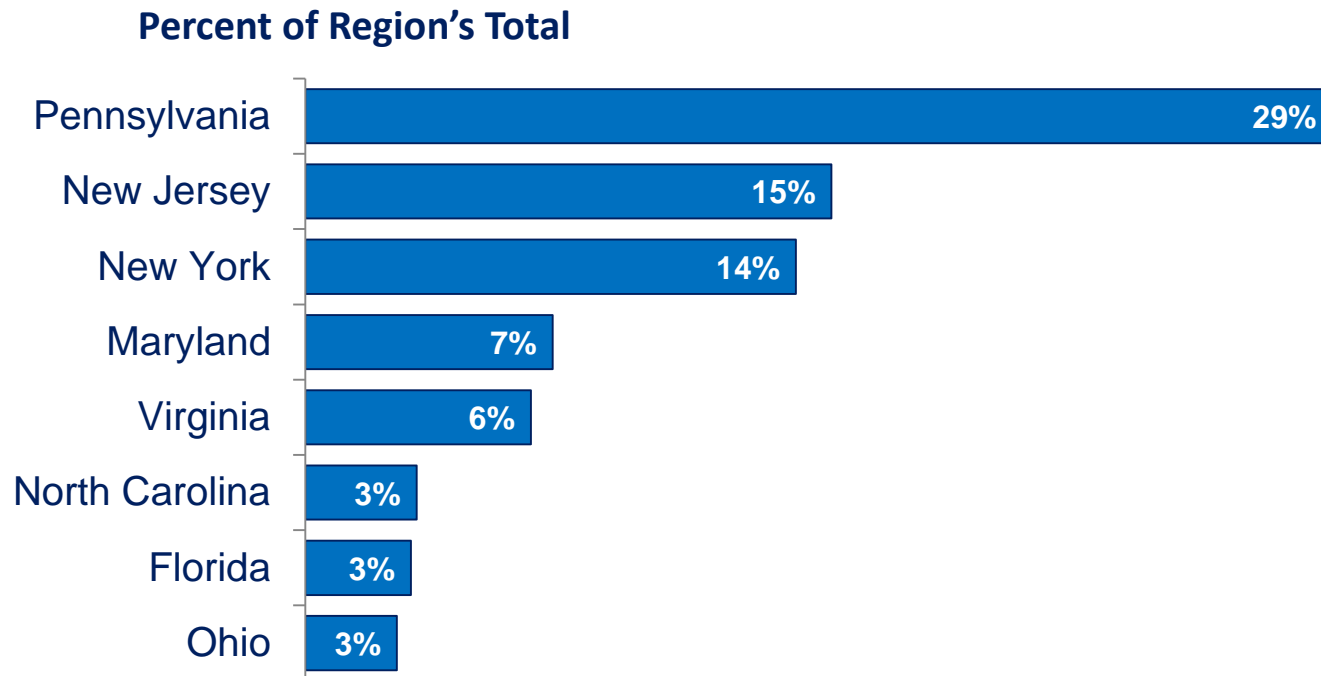


# Main Origin States for Overnight Travelers to Dutch Country Roads Region



Base: Overnight Trips

*Pennsylvania, New Jersey, and New Jersey remained the top origin markets for overnight travelers to the Dutch Country Roads region in 2017 – together accounting for close to 60% of the region's total for overnight travelers.*

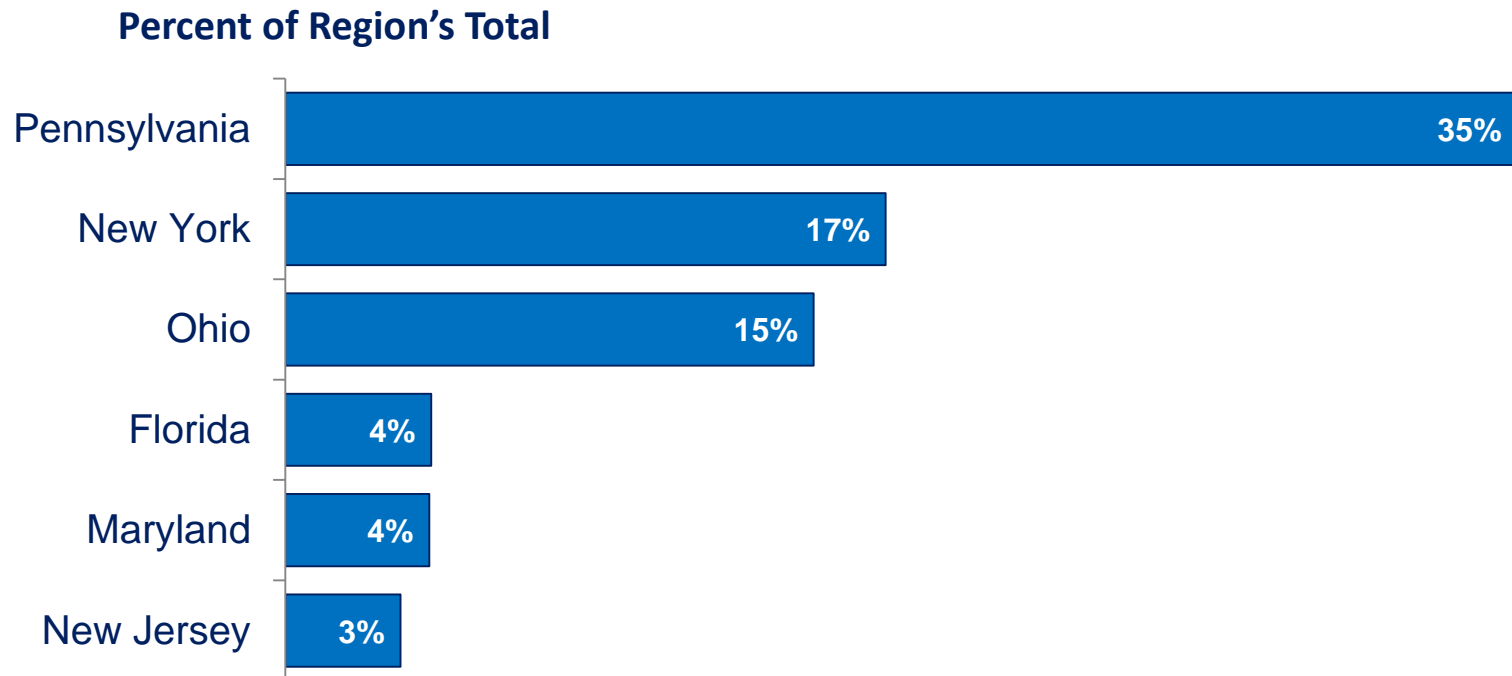


# Main Origin States for Overnight Travelers to Pennsylvania's Great Lakes Region



Base: Overnight Trips

*Pennsylvania, New York, and Ohio remained the top origin markets for overnight travelers to the Pennsylvania's Great Lakes Region in 2017 – together accounting for two-thirds of the region's total for overnight travelers.*



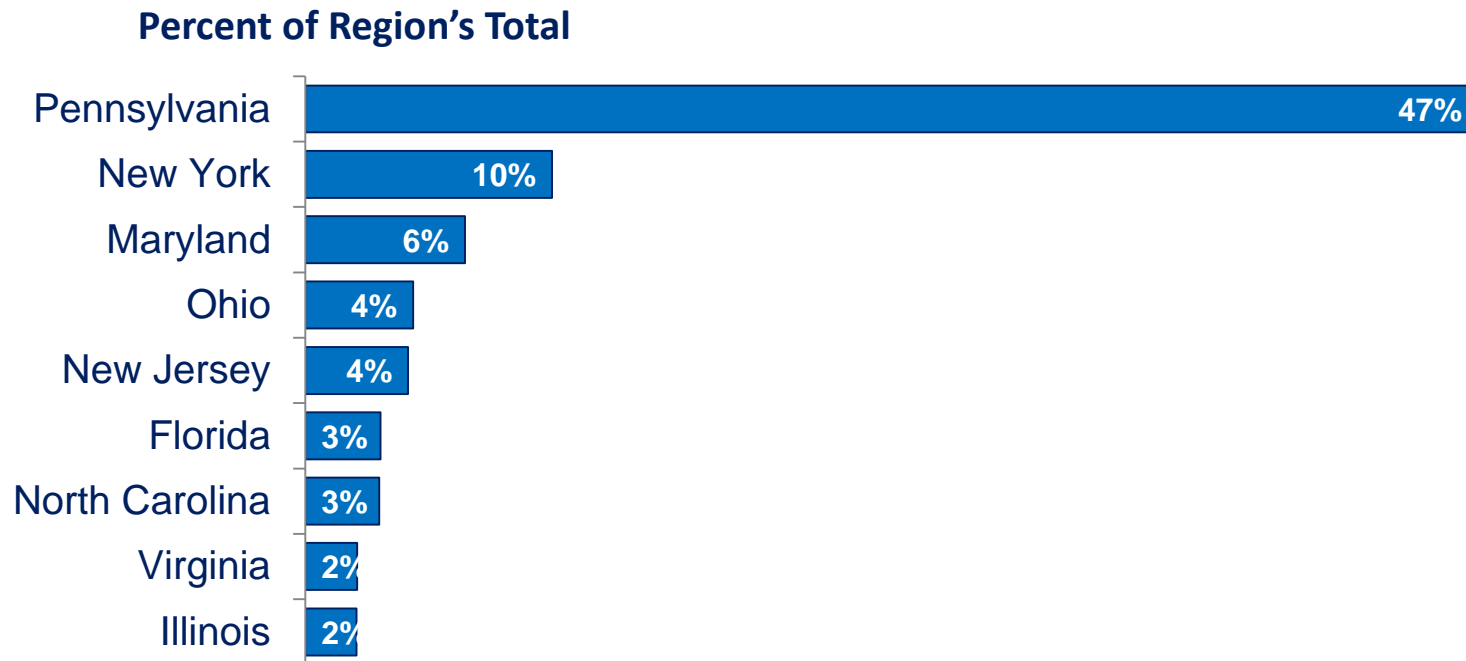


# Main Origin States for Overnight Travelers to Pennsylvania Wilds Region



Base: Overnight Trips

*Pennsylvania was by far the top origin market for overnight travelers to the Pennsylvania Wilds region in 2017 followed by New York, which together accounted for almost 60% of the region's total for overnight travelers.*

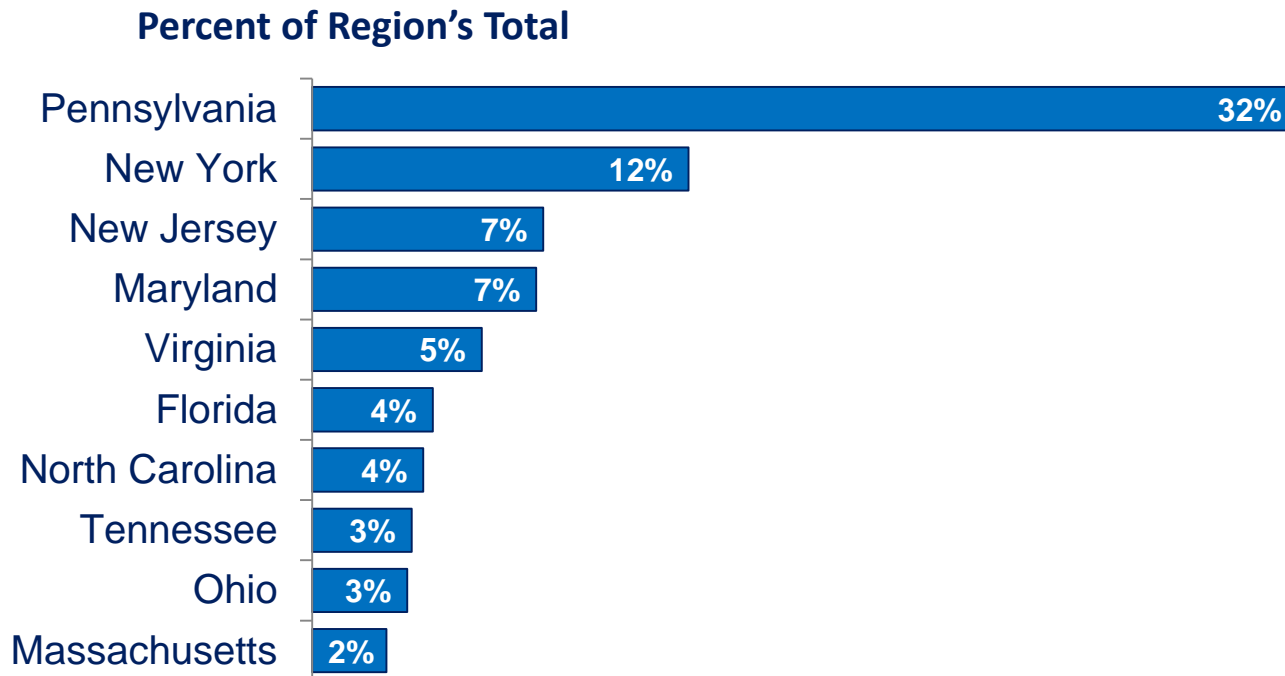


# Main Origin States for Overnight Travelers to Valleys of the Susquehanna Region



Base: Overnight Trips

*Pennsylvania was the top origin market for overnight travelers to the Valleys of the Susquehanna region in 2017, followed by New York, New Jersey, and Maryland – together accounting for close to 60% of the region's overnight travelers.*

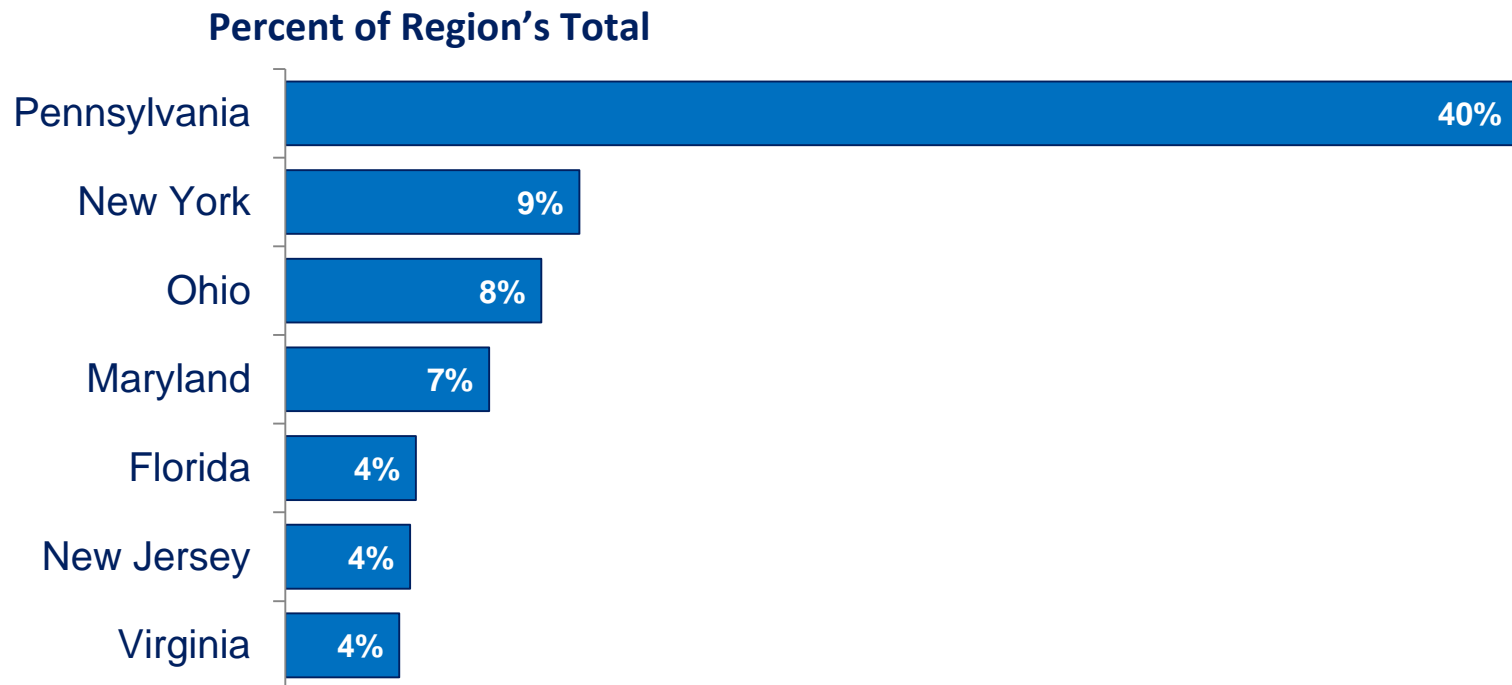


# Main Origin States for Overnight Travelers to The Alleghenies Region



Base: Overnight Trips

*Pennsylvania, New York, Ohio, and Maryland remained the top origin markets for overnight travelers to The Alleghenies region in 2017 – together accounting for close to 60% of the region's total for overnight travelers.*

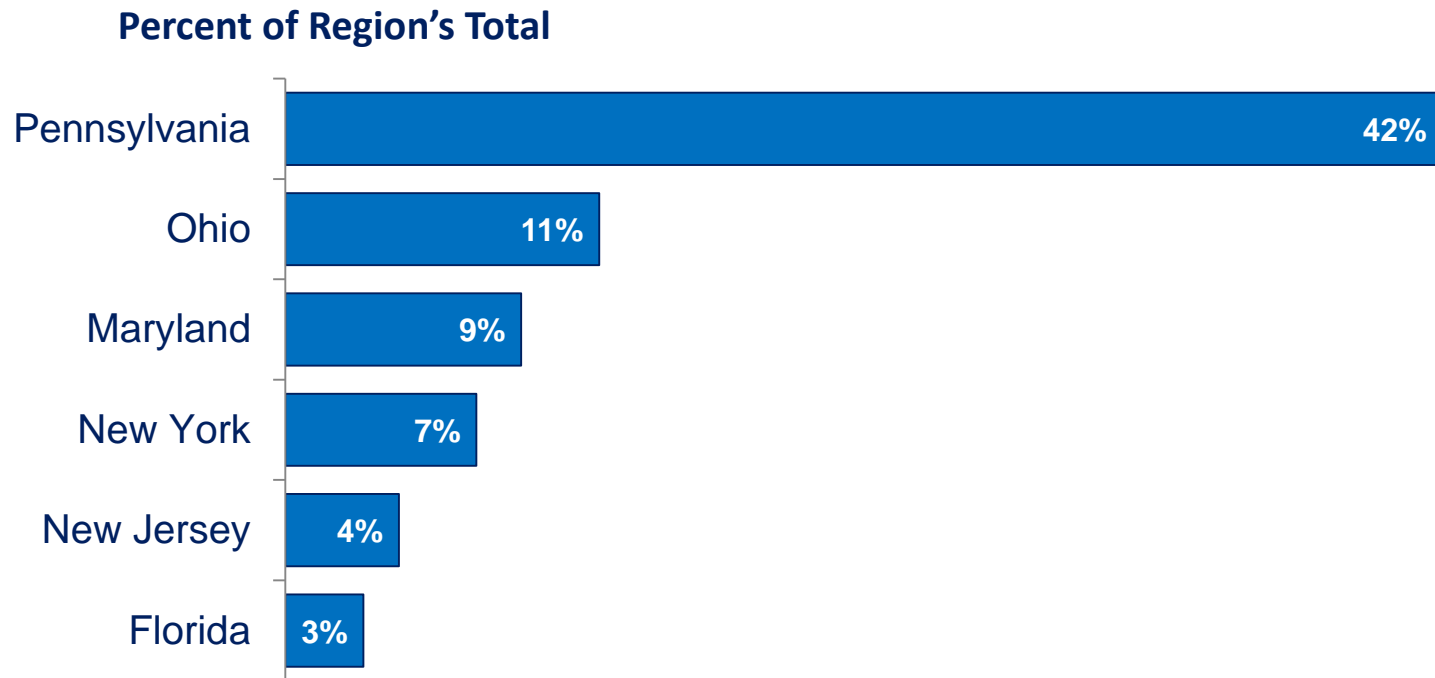


# Main Origin States for Overnight Travelers to Laurel Highlands Region



Base: Overnight Trips

*Pennsylvania was the top origin market for overnight travelers to the Laurel Highlands region in 2017 – accounting for more than 42% of the region's total for overnight travelers.*

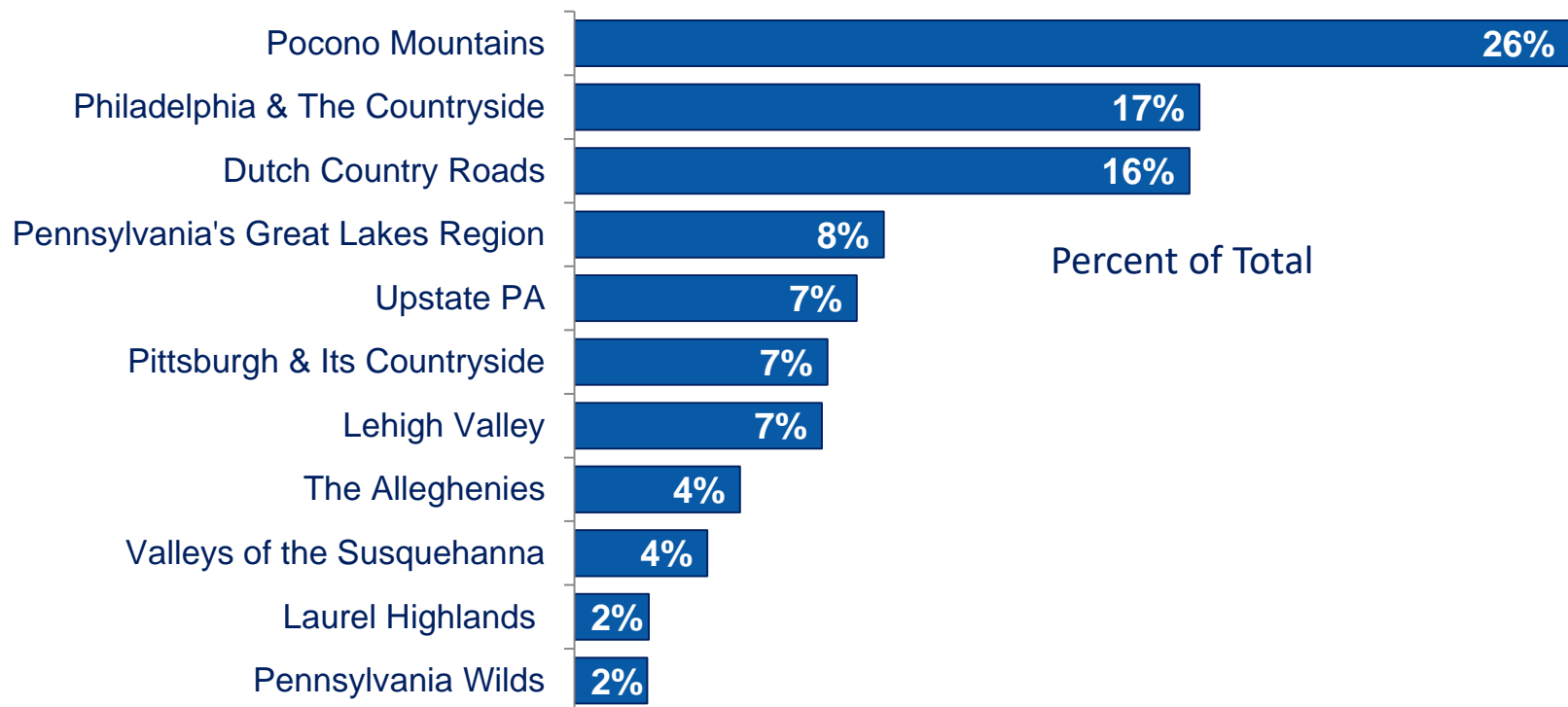


# Pennsylvania Tourism Regions Visited by Residents of New York State



Base: Overnight Marketable Trips

*The Pocono Mountains region remained the most popular destination for New York leisure travelers who visited Pennsylvania in 2017.*



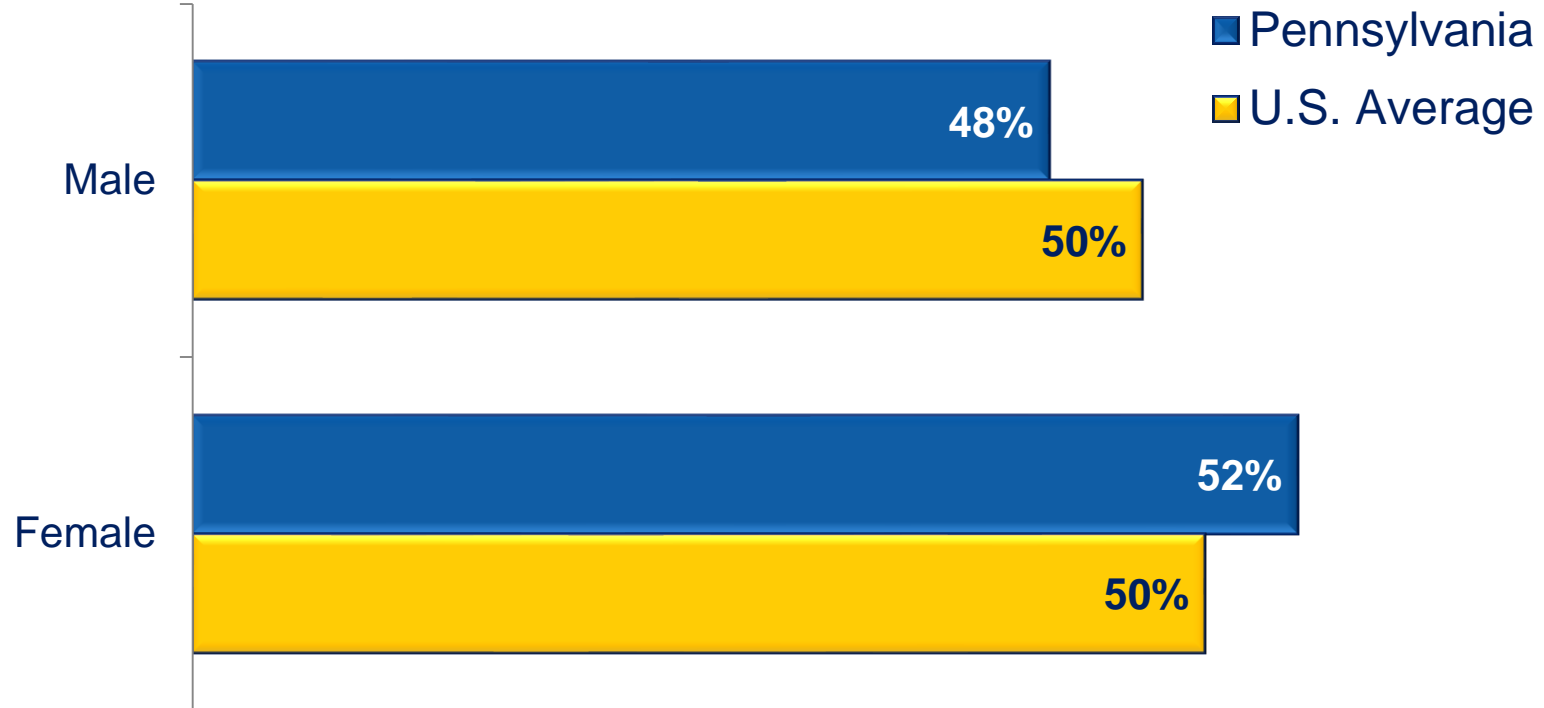
# **2017 Traveler Profile — Overnight Marketable Trips**

# Gender



Base: Marketable Overnight Trips

Percent of Total

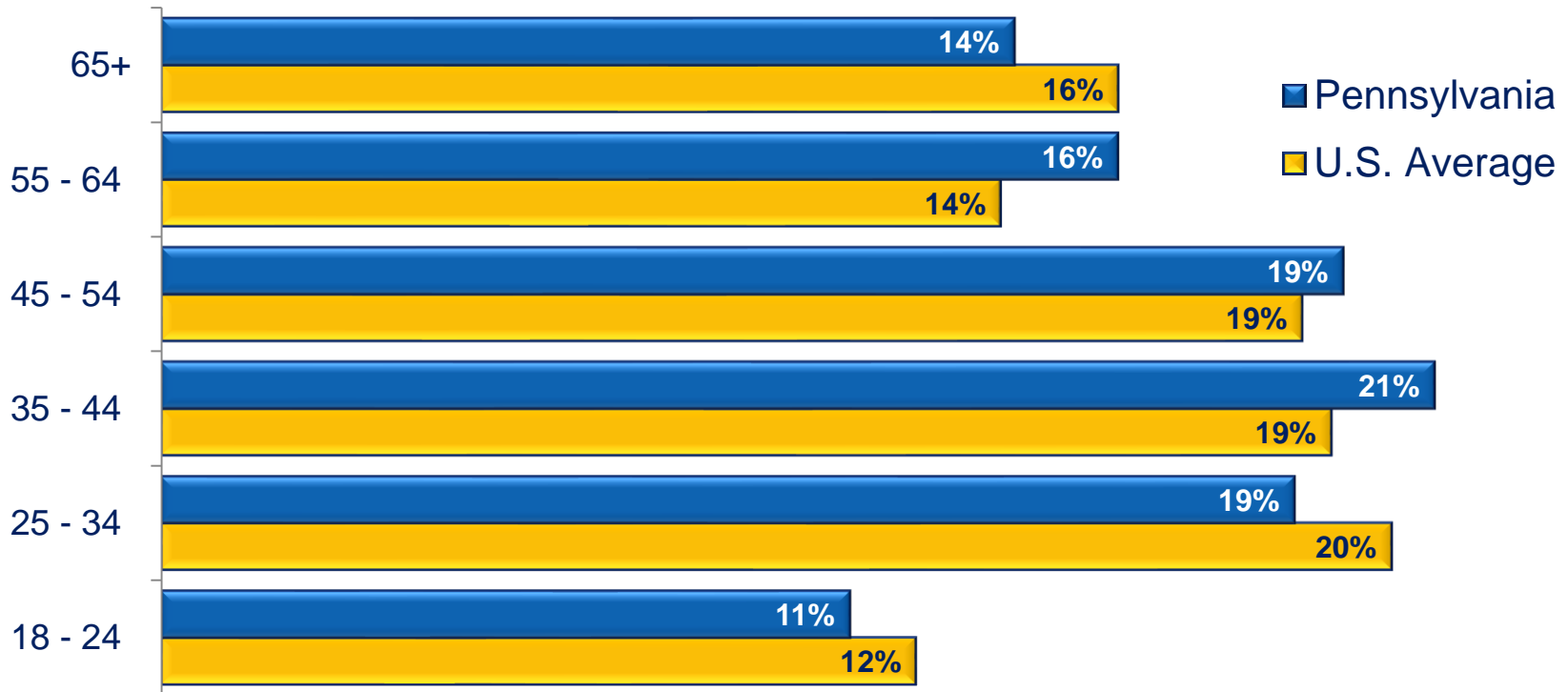


# Age



Base: Marketable Overnight Trips

## Age (in years)



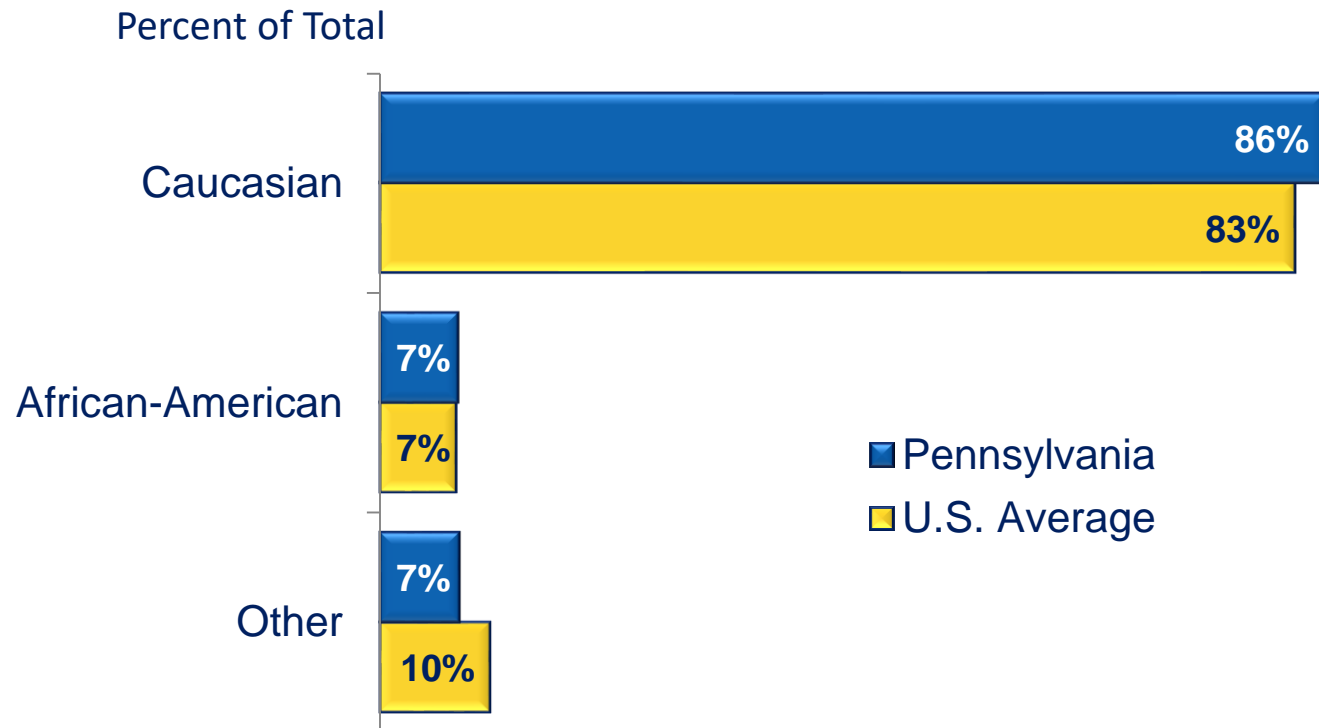
	<u>Pennsylvania</u>	<u>U.S. Average</u>
Median Age:	44.8	44.1



# Race



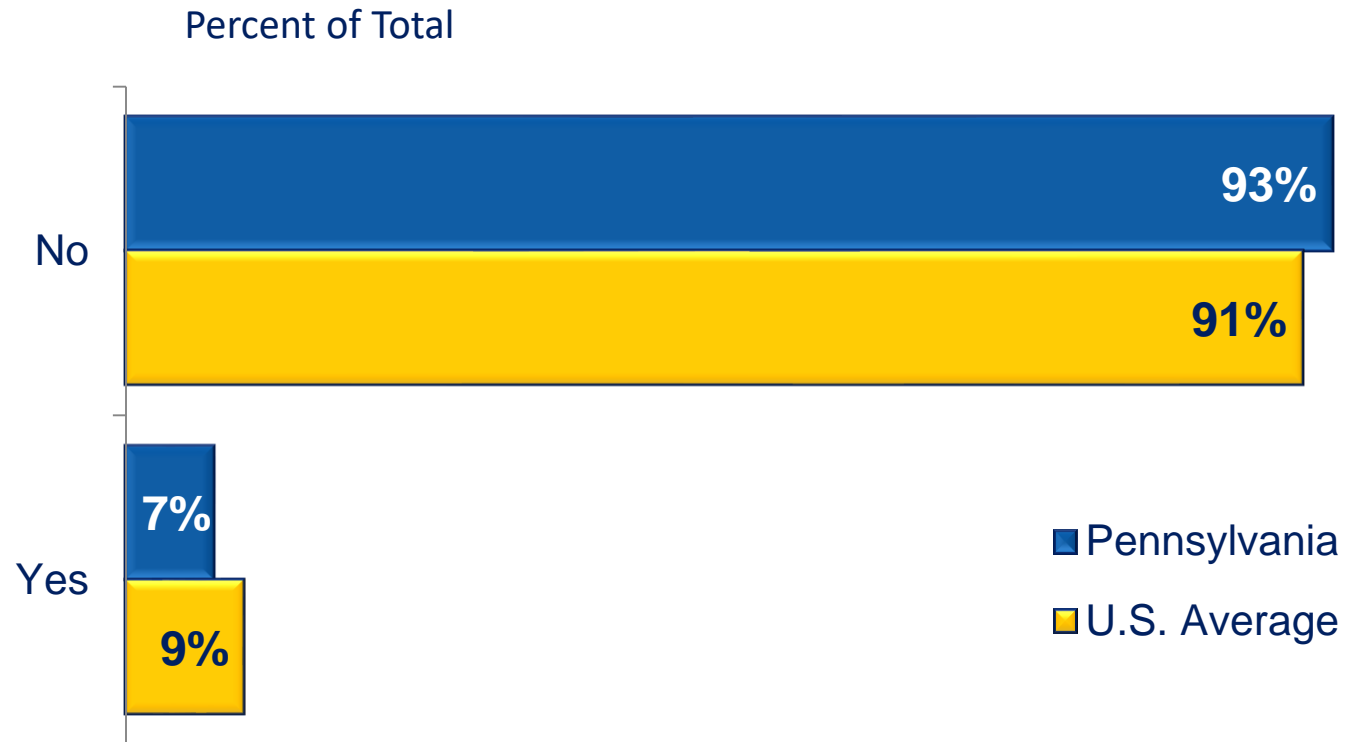
Base: Marketable Overnight Trips



# Hispanic Background



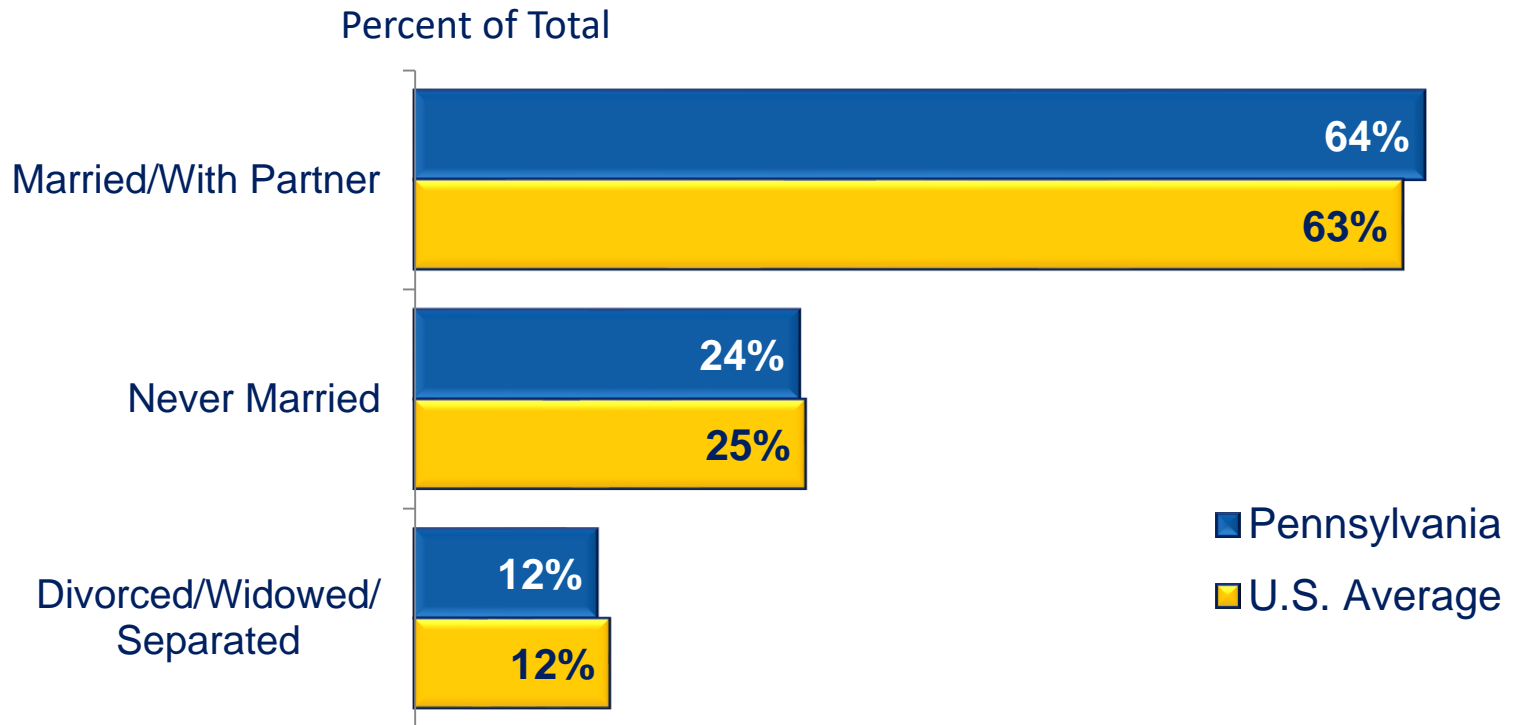
Base: Marketable Overnight Trips



# Marital Status



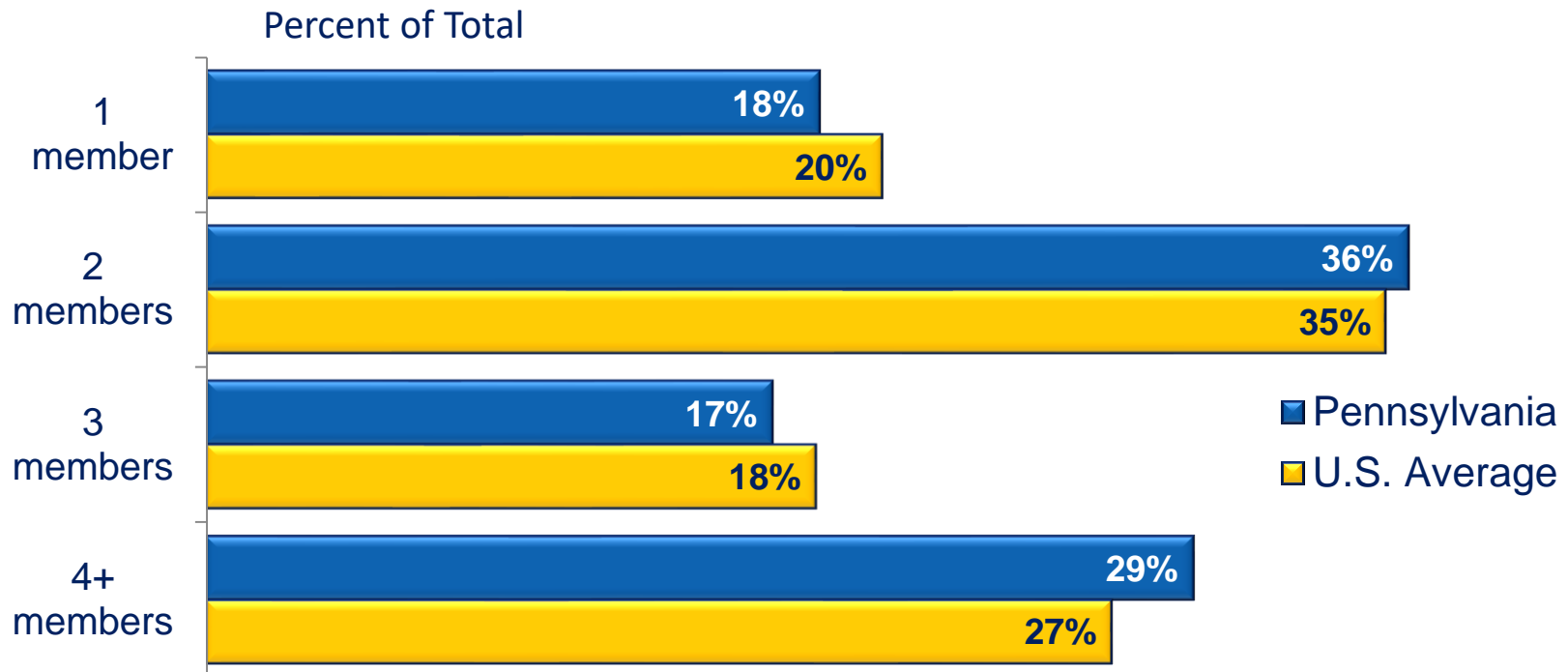
Base: Marketable Overnight Trips



# Household Size



Base: Marketable Overnight Trips

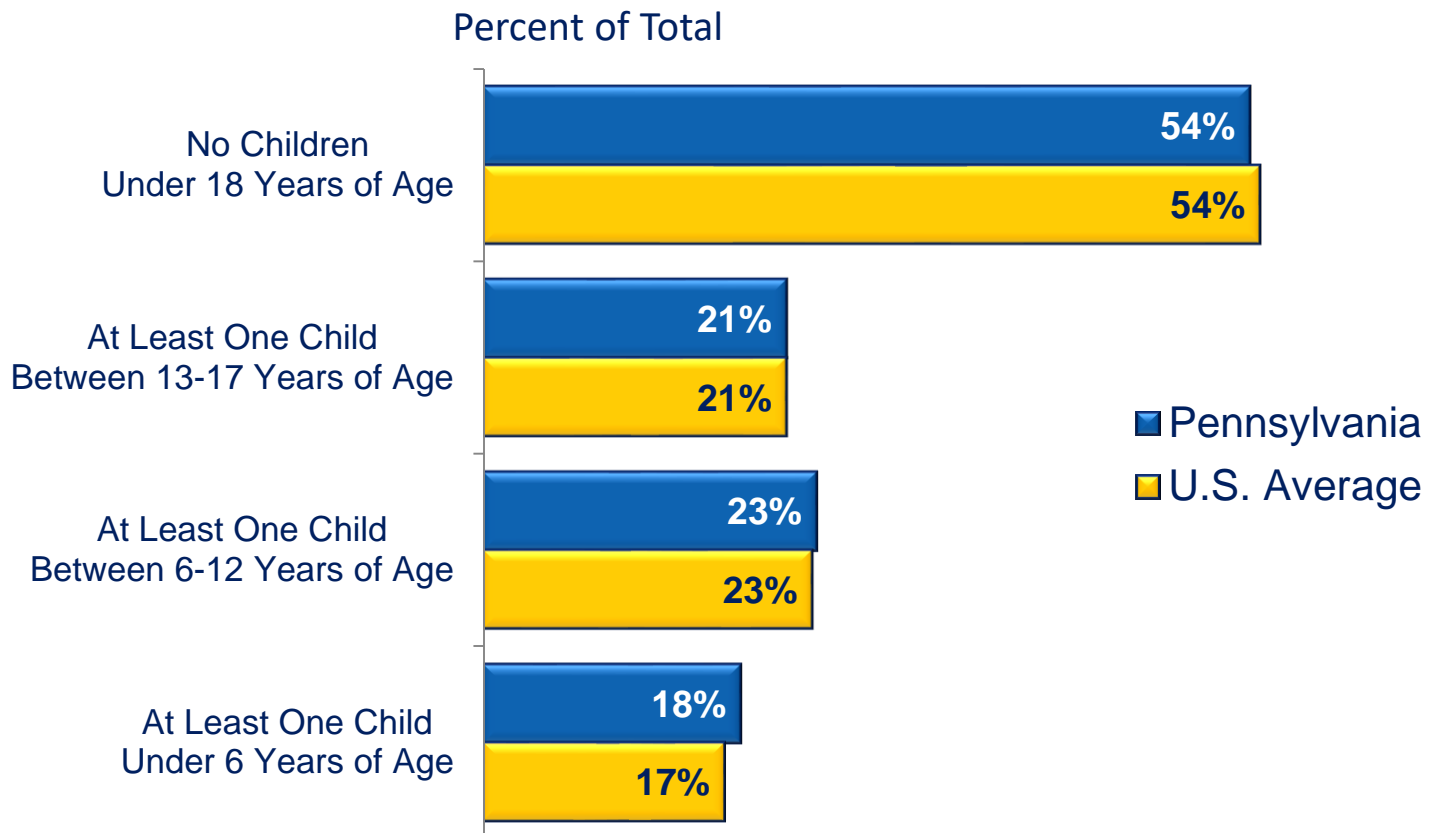


	<u>Pennsylvania</u>	<u>United States</u>
Average Household Size:	2.8	2.8

# Presence of Children in Household



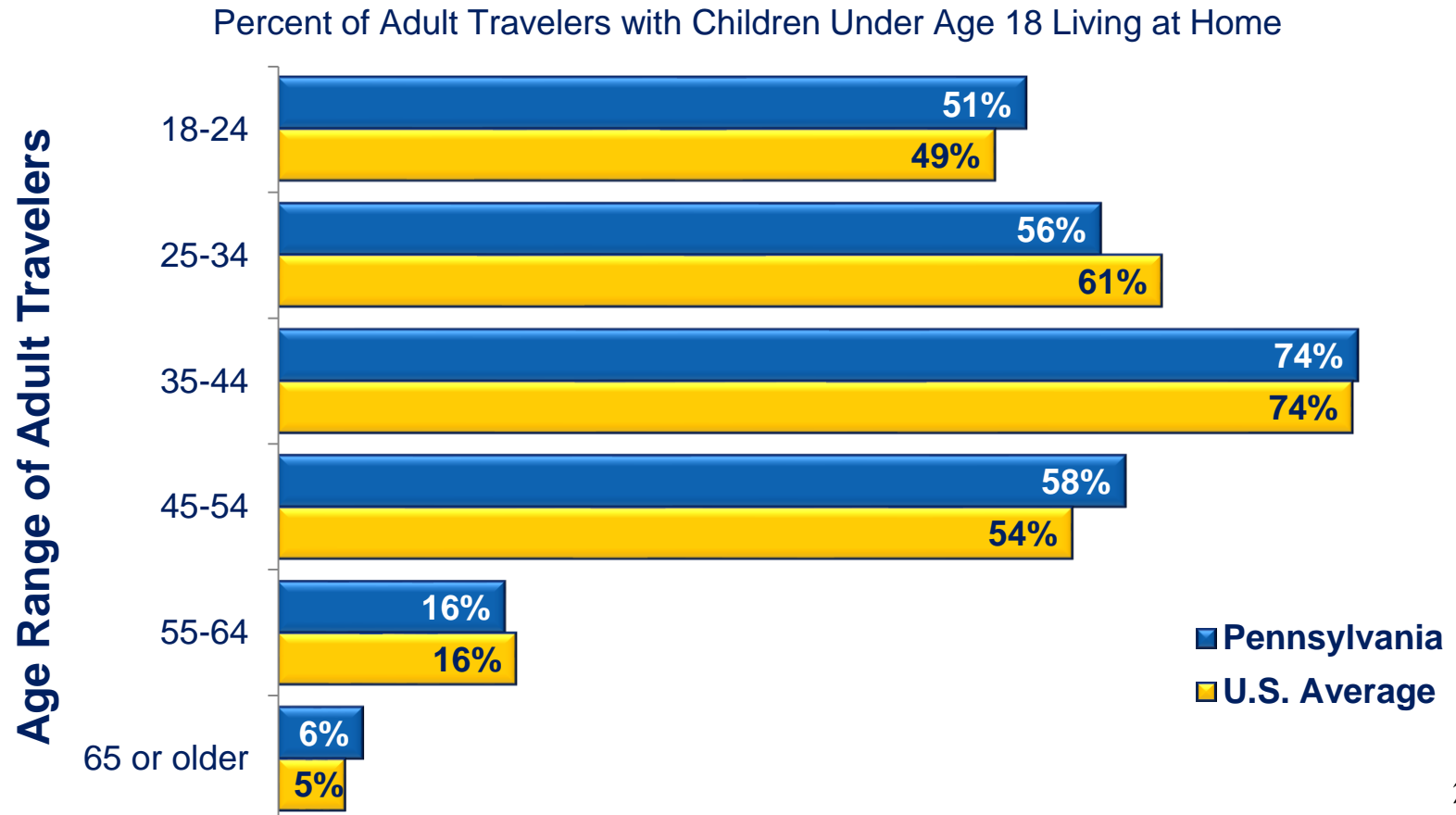
Base: Marketable Overnight Trips



# Presence of Children in Household by Age of Adult Traveler



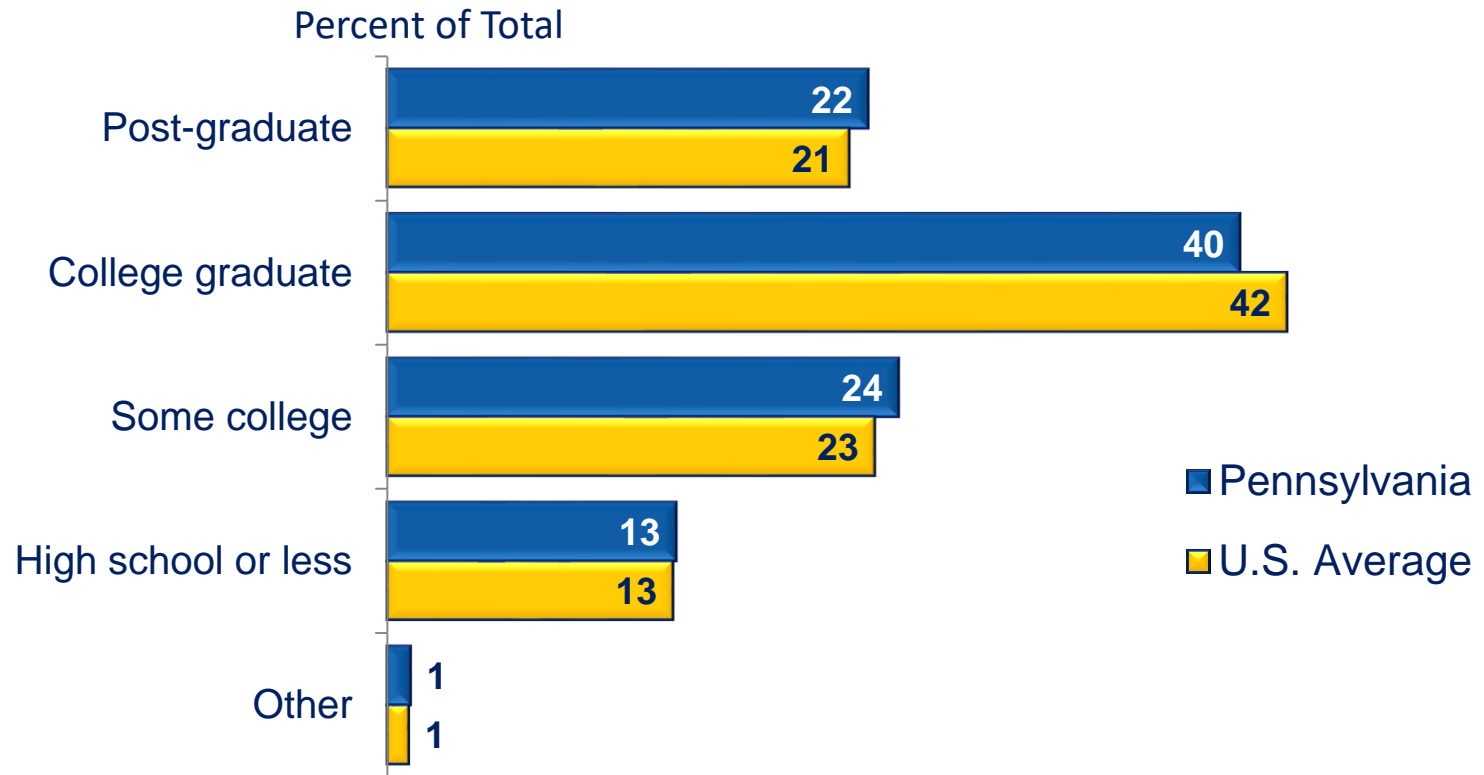
Base: Marketable Overnight Trips



# Education Level



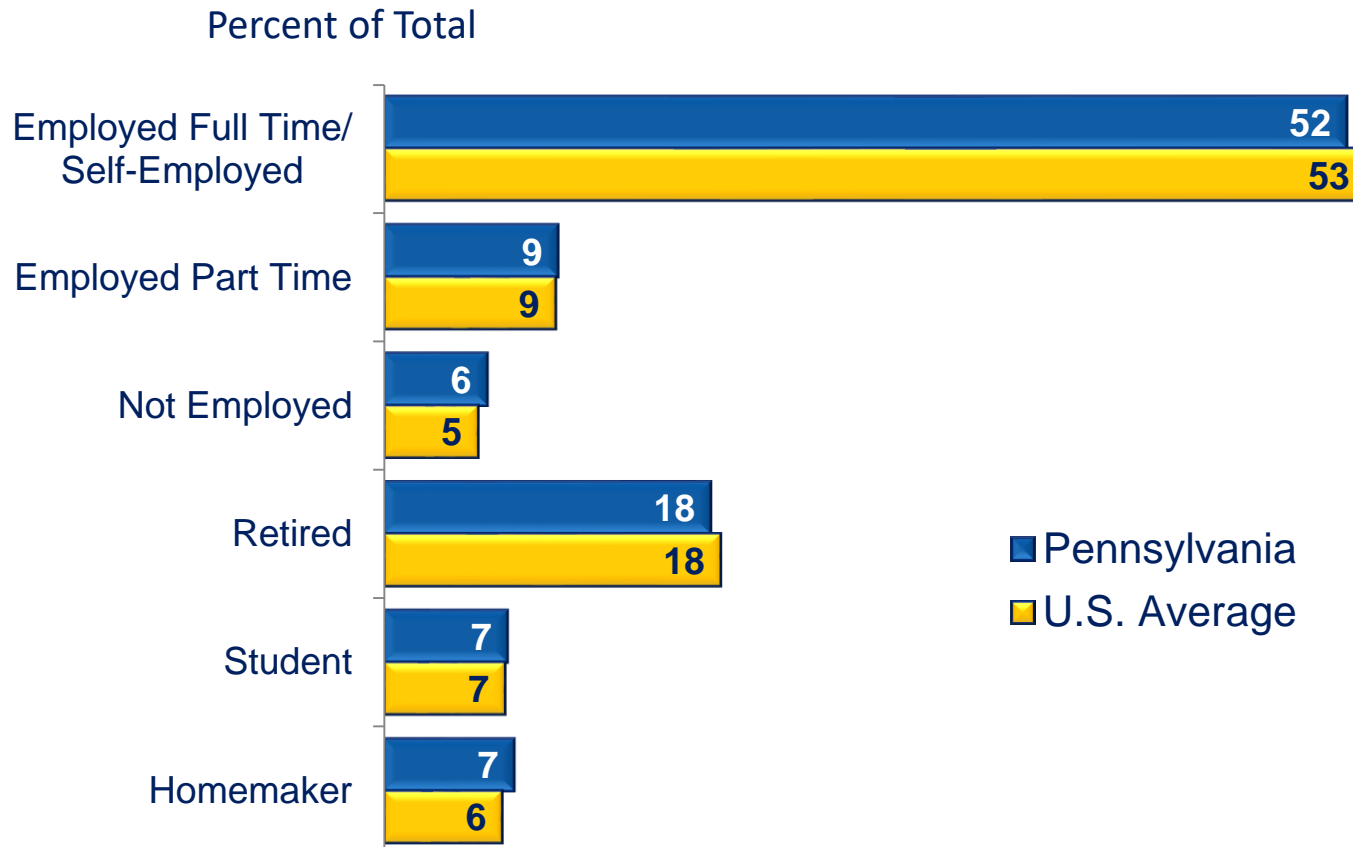
Base: Marketable Overnight Trips



# Employment Status



Base: Marketable Overnight Trips

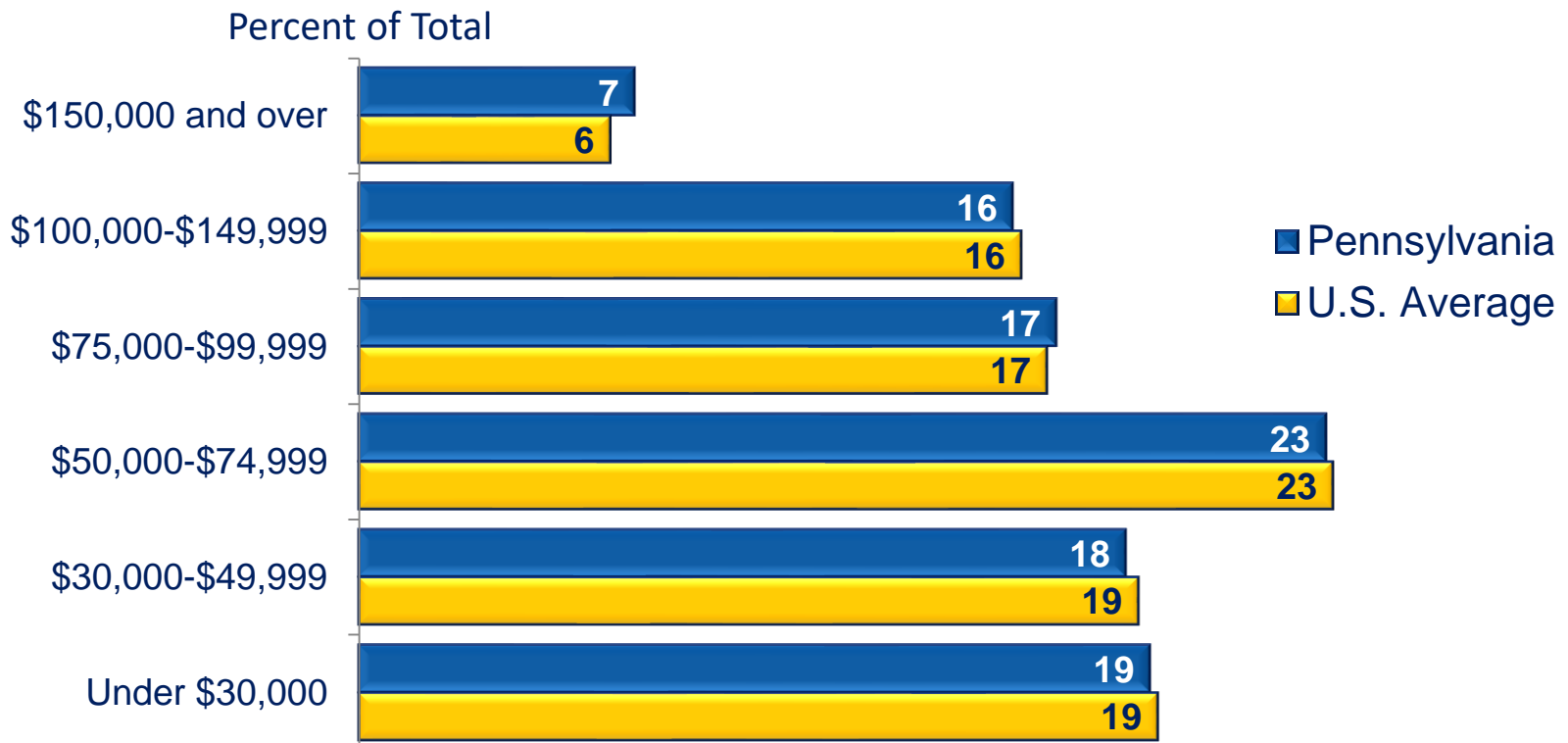




# Household Income



Base: Marketable Overnight Trips



	<u>Pennsylvania</u>	<u>U.S. Average</u>
Median Household Income:	\$63,540	\$62,850

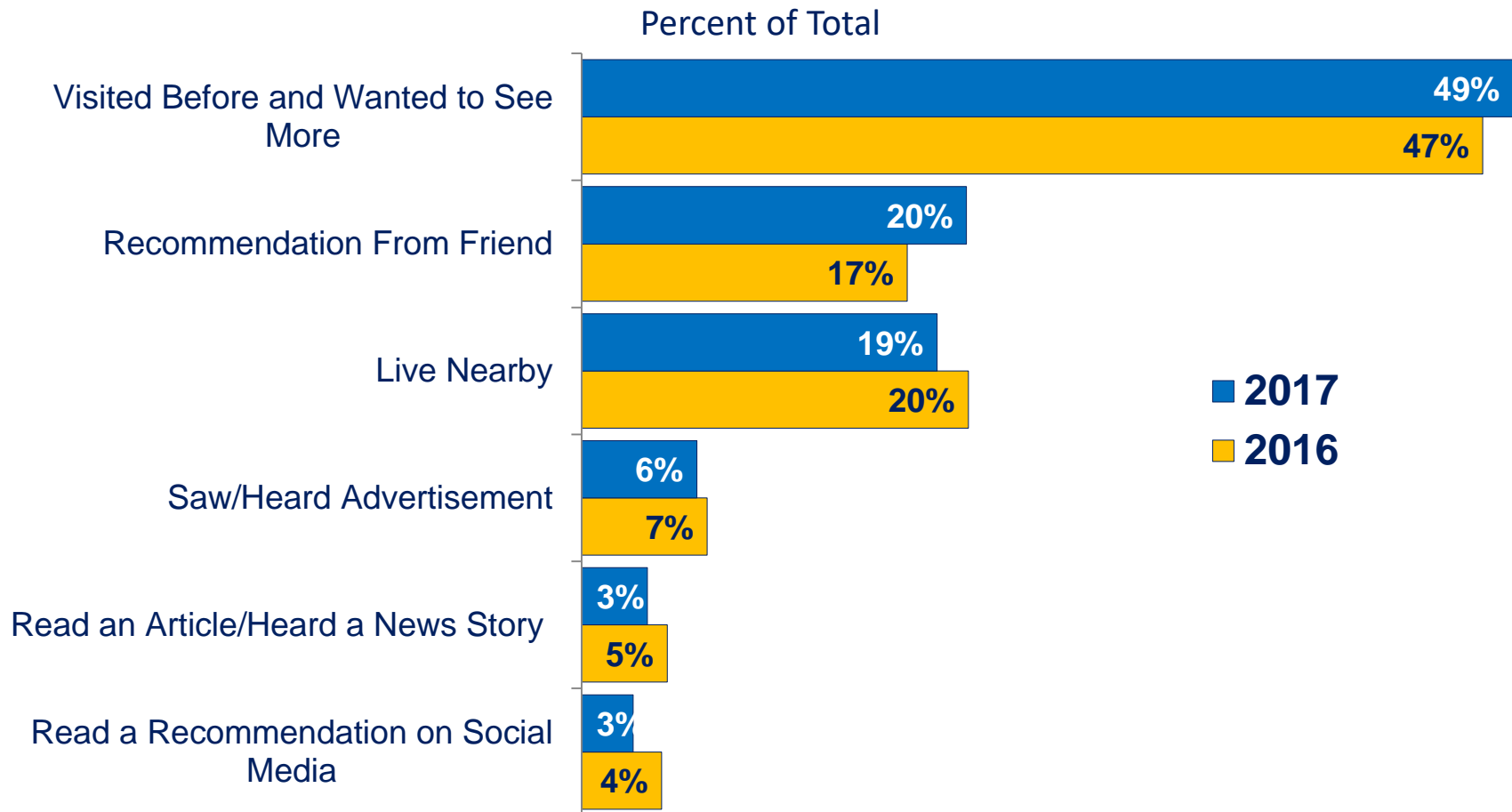
# **Trip Planning & Booking**

## **2017 Marketable Overnight Trips**

# Main Reason for Choosing Pennsylvania



Base: Marketable Overnight Trips



# Pennsylvania 2017 Trip Planning Horizon

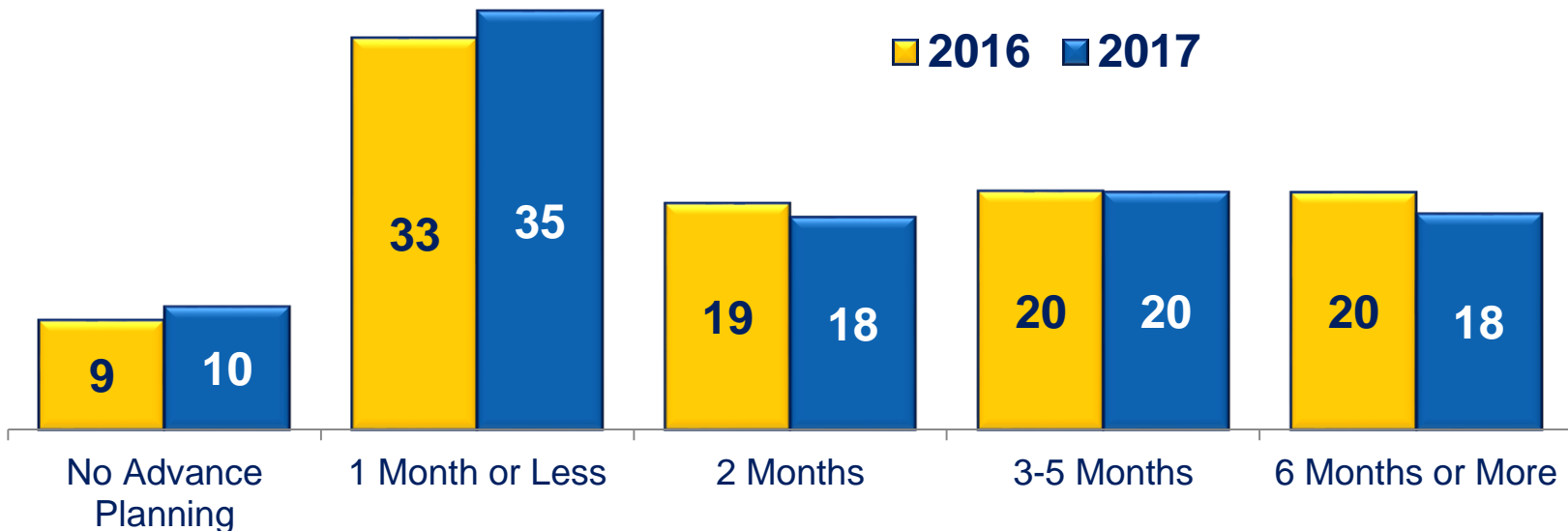


Base: Marketable Overnight Trips

*As in prior years, the planning horizon was relatively short for most travelers to Pennsylvania, with over 60% planning their trip within two months of departure.*

Percent of Total

■ 2016 ■ 2017

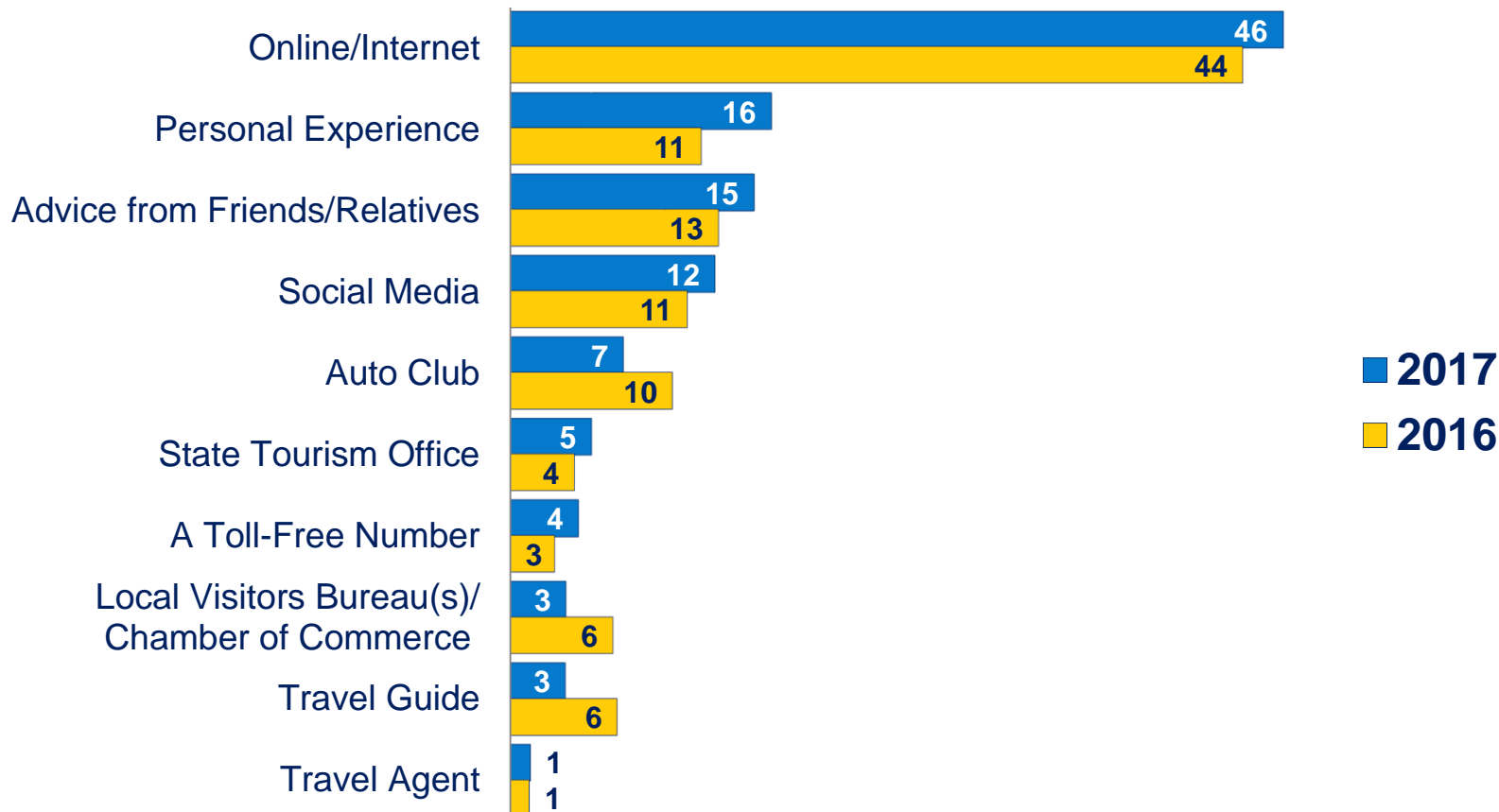


# Information Sources Used for Planning the Trip



Base: Marketable Overnight Trips

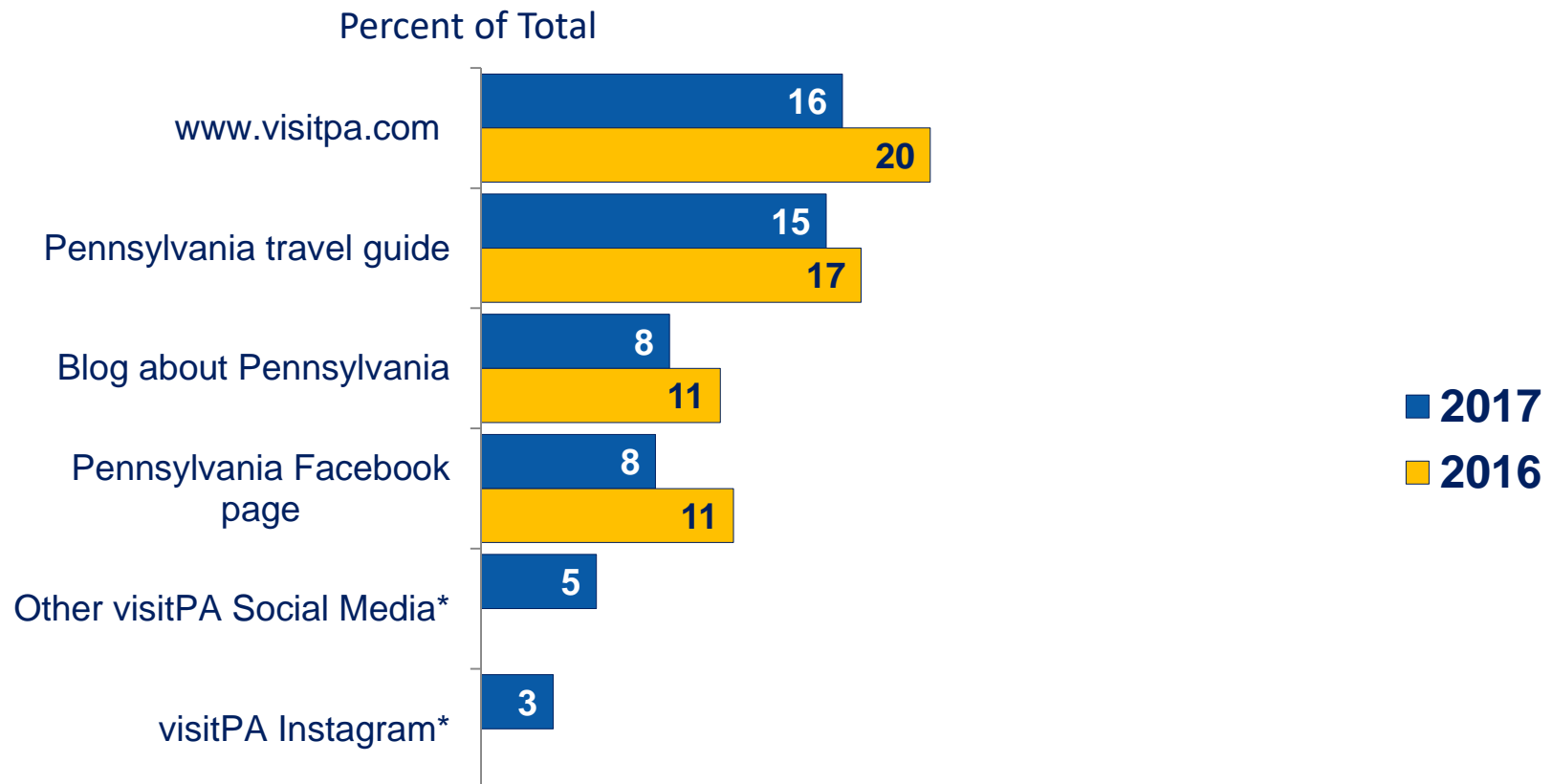
Percent of Total



# Use of Pennsylvania Tourism Office Trip Planning Tools



Base: Marketable Overnight Trips



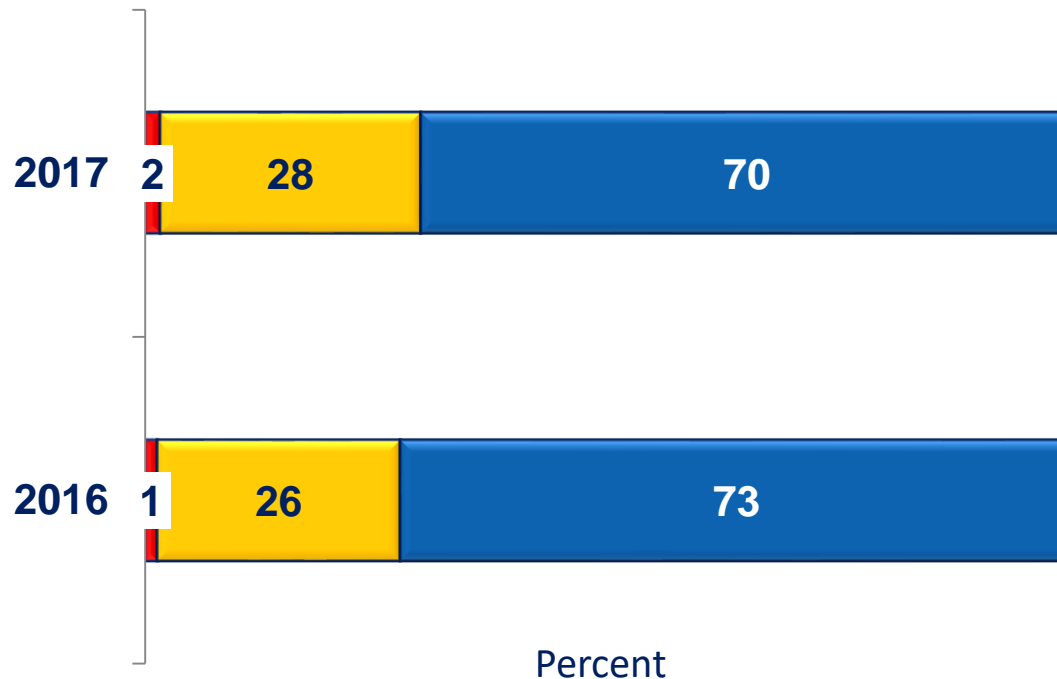
\* Added in 2017

# *www.visitPA.com*

## Usefulness in Trip Planning



Base: Marketable Overnight Trips

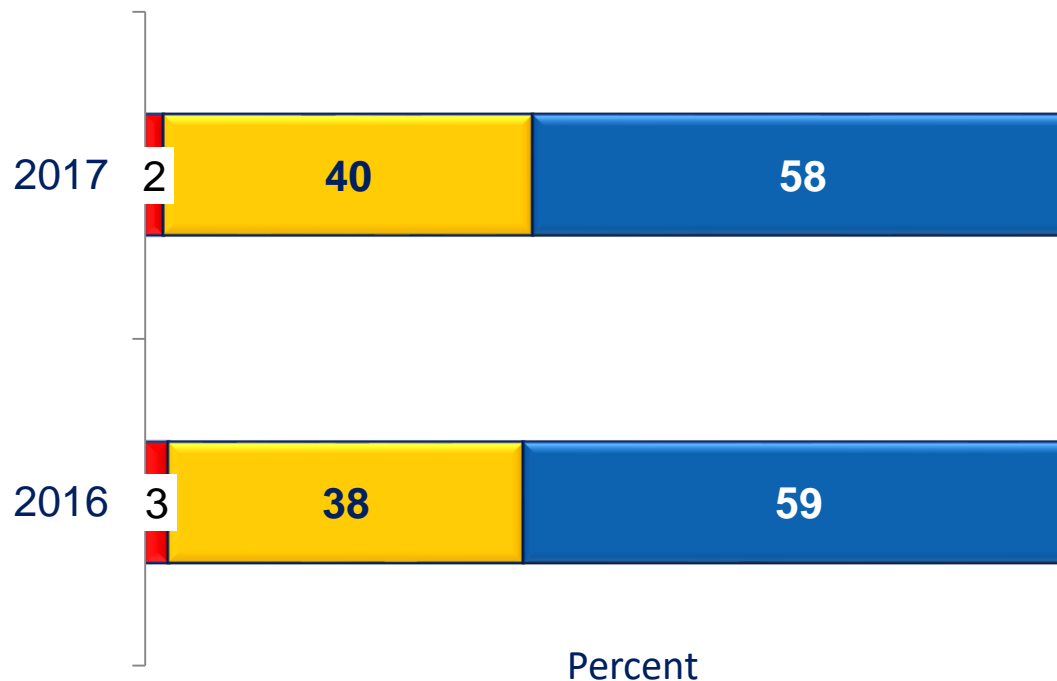


3-Pt. Scale: ■ Not Very Useful ■ Somewhat Useful ■ Very Useful

# Pennsylvania Travel Guide Usefulness in Trip Planning



Base: Marketable Overnight Trips



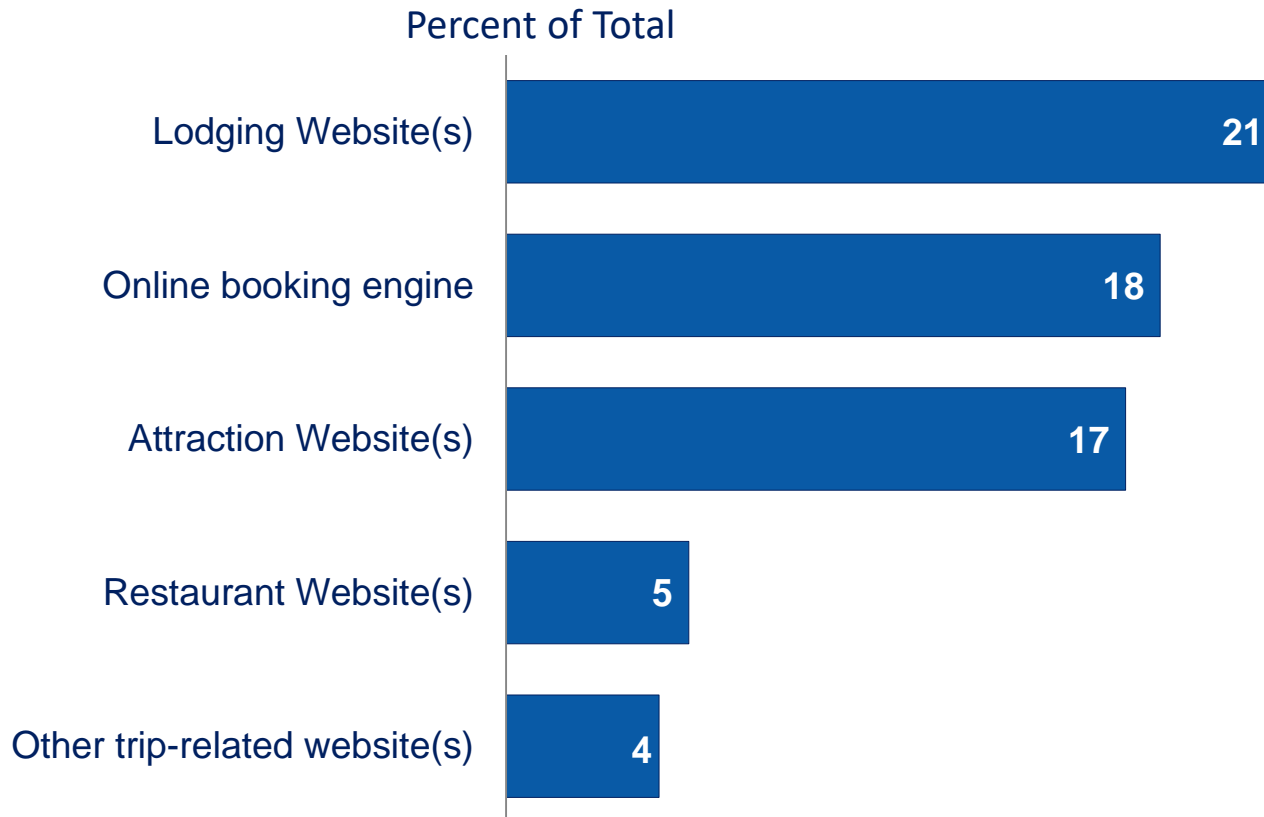
3-Pt. Scale:    ■ Not Very Useful    ■ Somewhat Useful    ■ Very Useful



# Websites Used for Planning Pennsylvania Trip



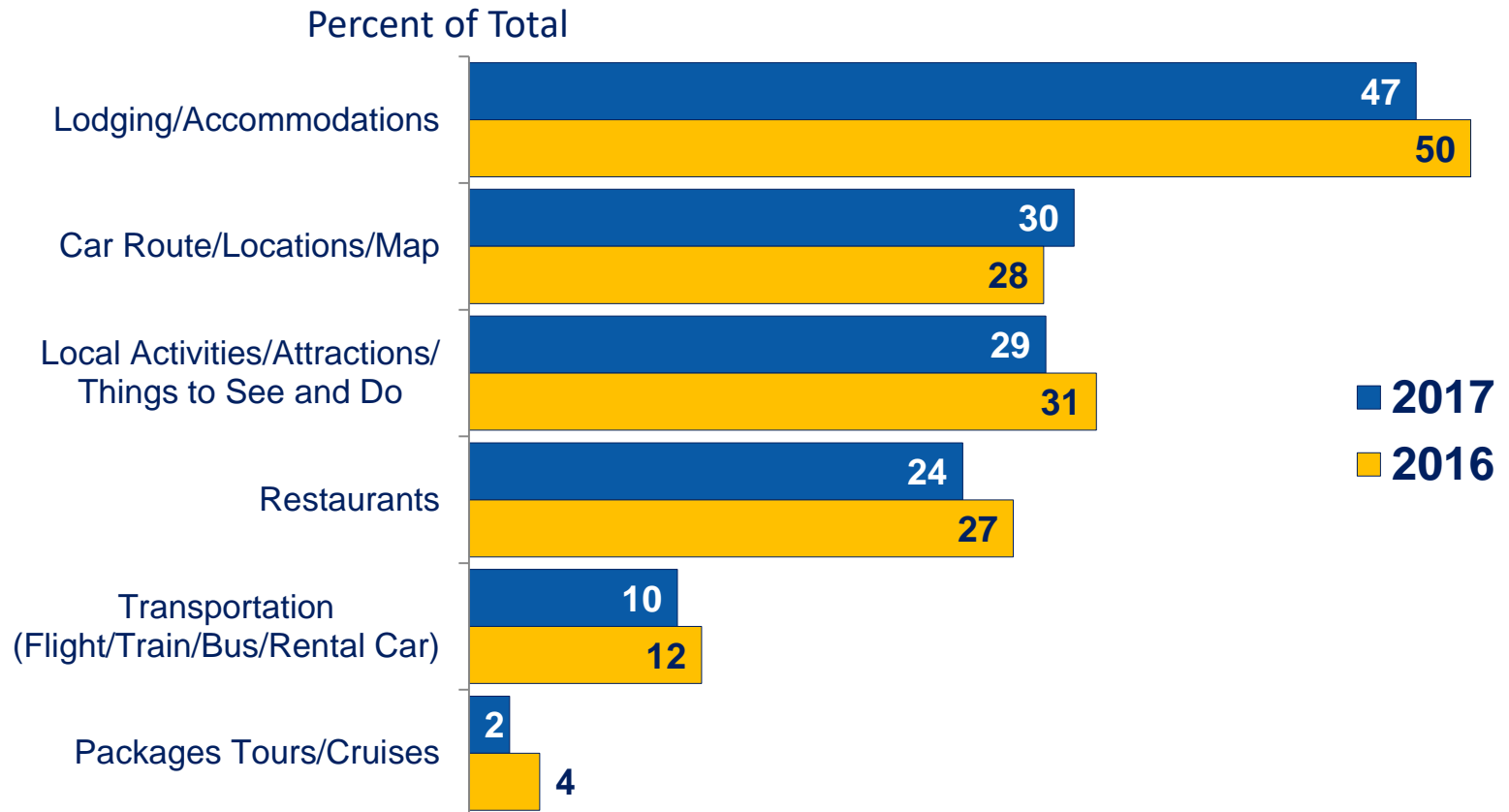
Base: Marketable Overnight Trips



# Trip Elements Planned Using Internet



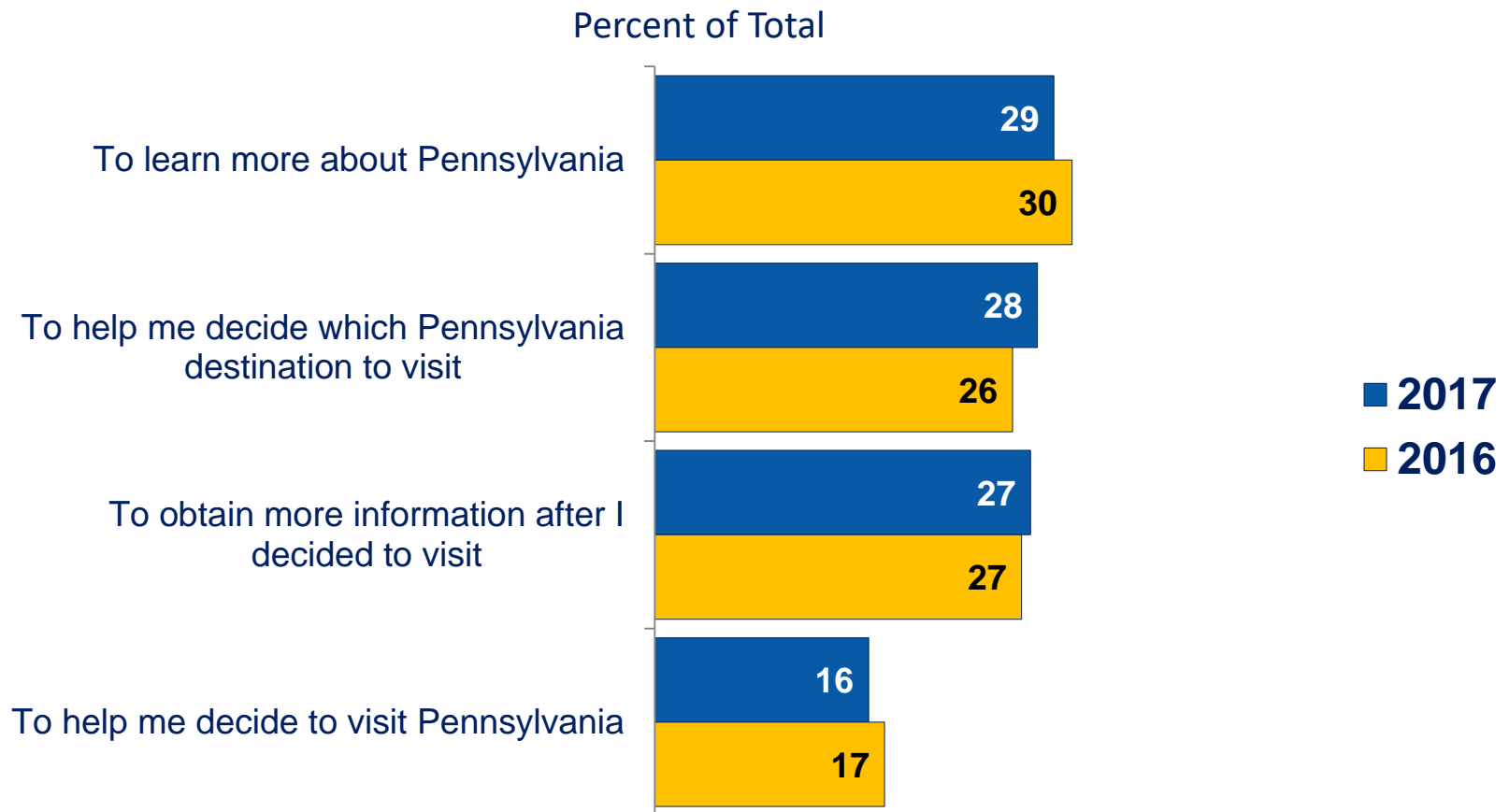
Base: Marketable Overnight Trips



# Reasons for Visiting *www.visitPA.com*



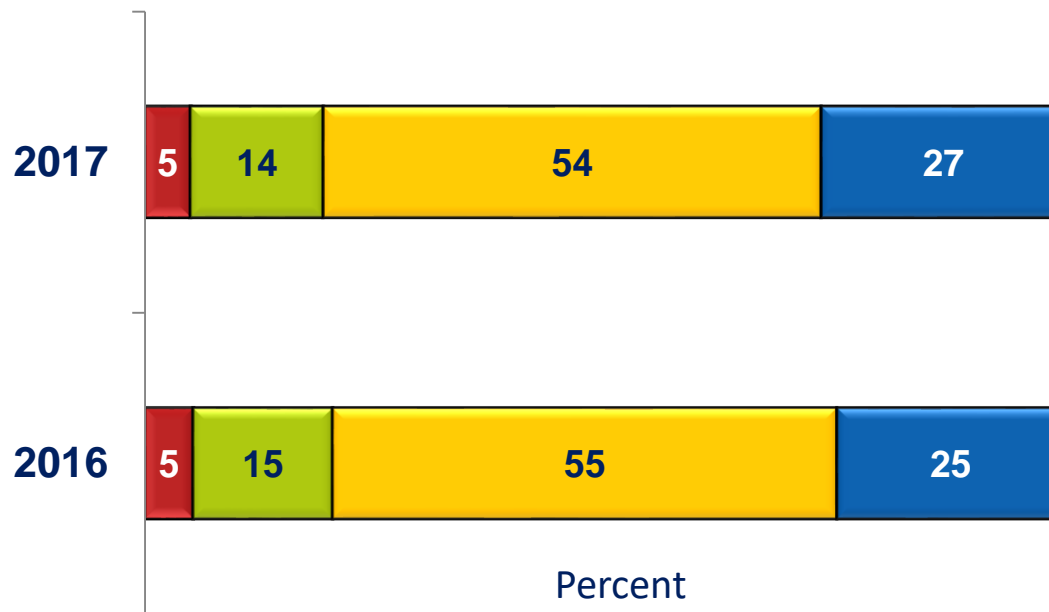
Base: Marketable Overnight Trips



# *www.visitPA.com* Influence on Planning



Base: Marketable Overnight Trips

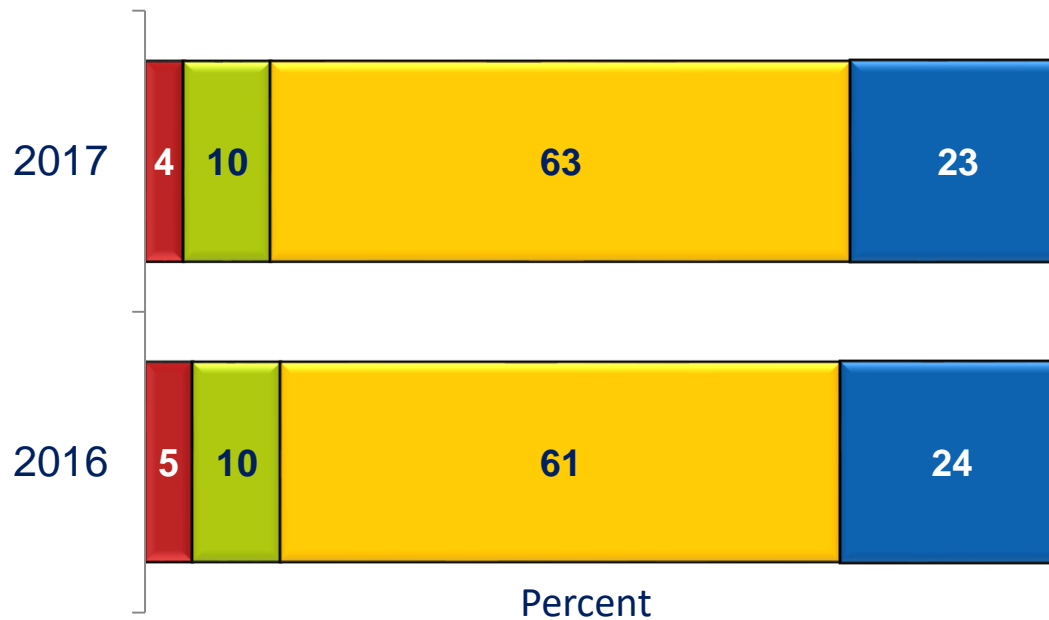


**4-Pt. Scale:** ■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

# *www.visitPA.com* Influence on Visitation



Base: Marketable Overnight Trips



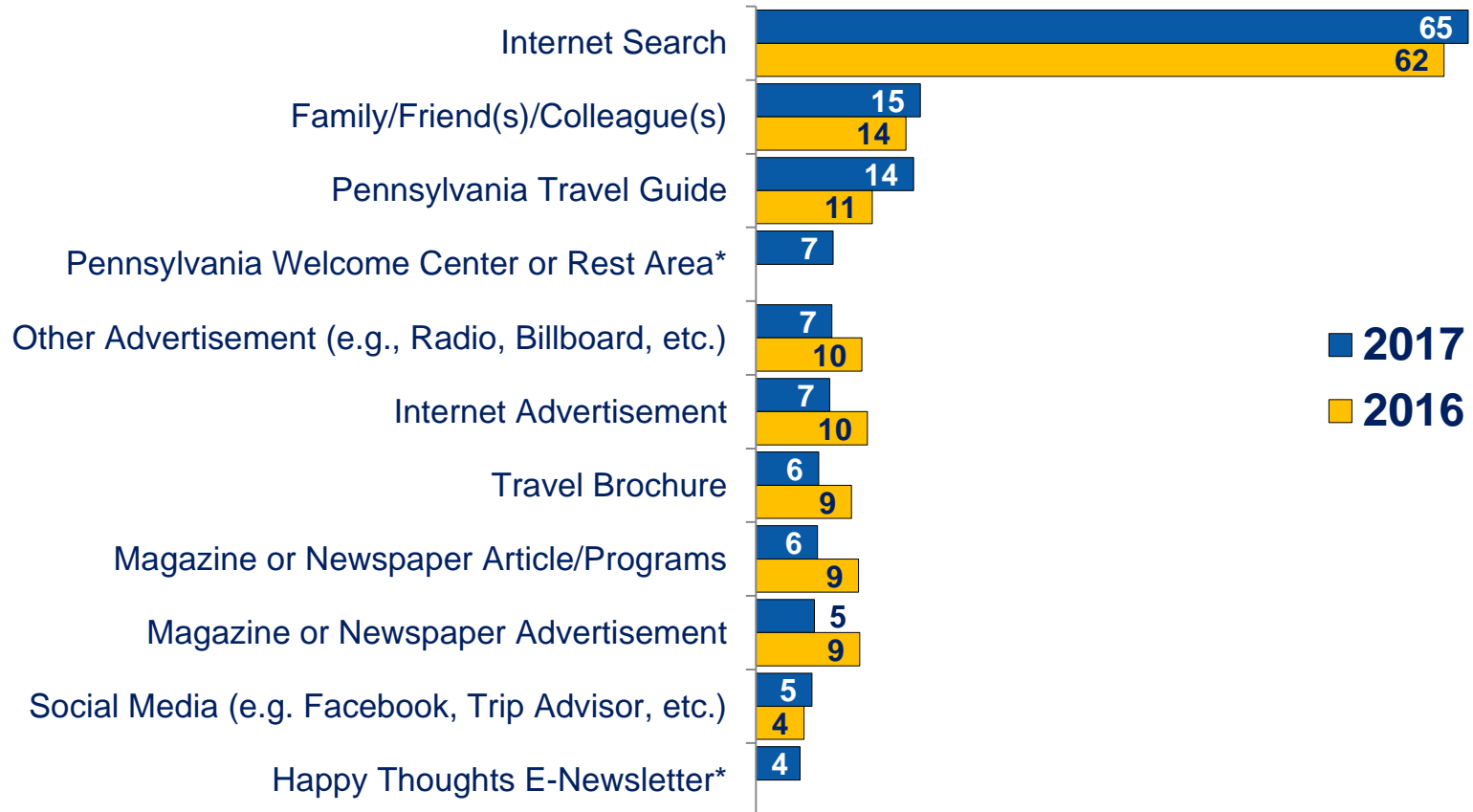
4-Pt. Scale: ■ No Influence ■ Very little Influence ■ Some Influence ■ Large Influence

# Channels to *www.visitPA.com*



Base: Marketable Overnight Trips

Percent of Total

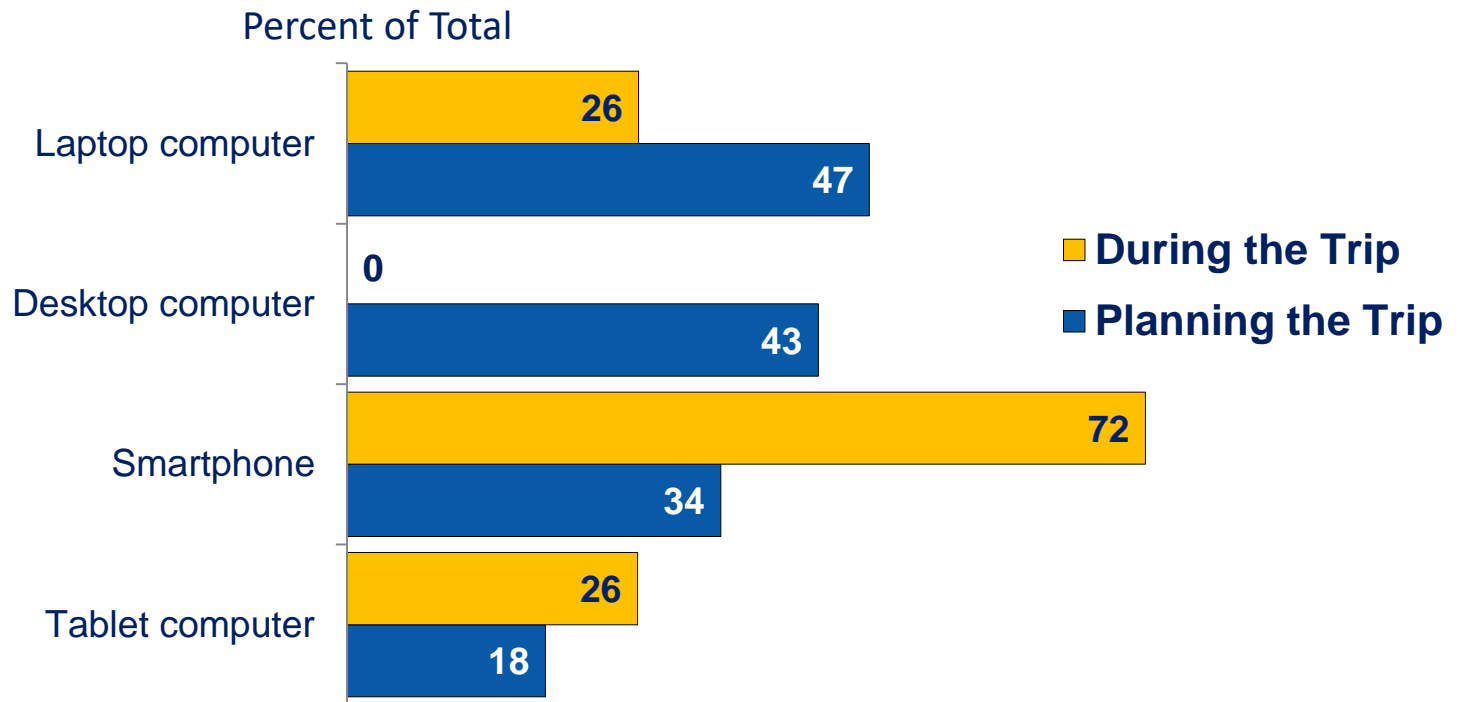


\*New category added in 2017

# Technology Used by Travelers, 2017



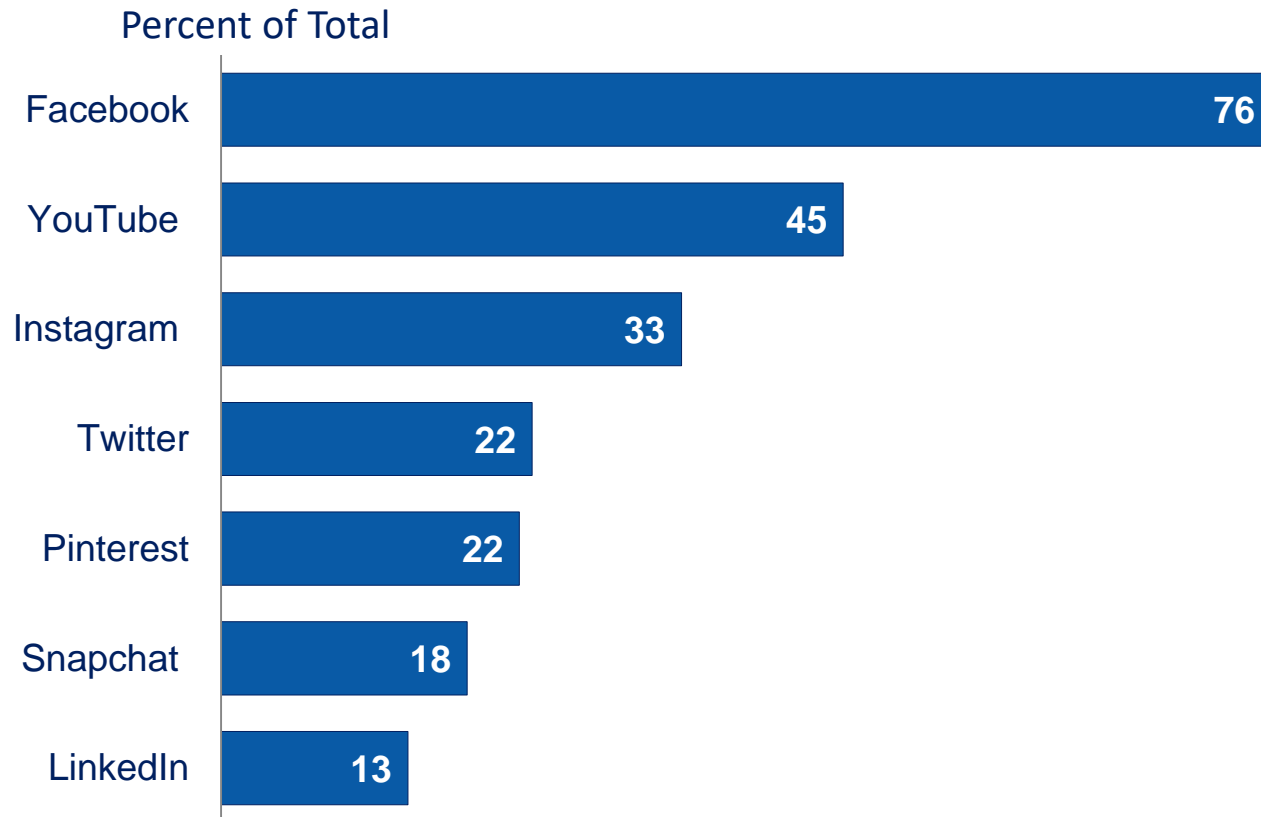
Base: Marketable Overnight Trips



# Social Media Channels Used by Travelers to Pennsylvania in 2017



Base: Marketable Overnight Trips

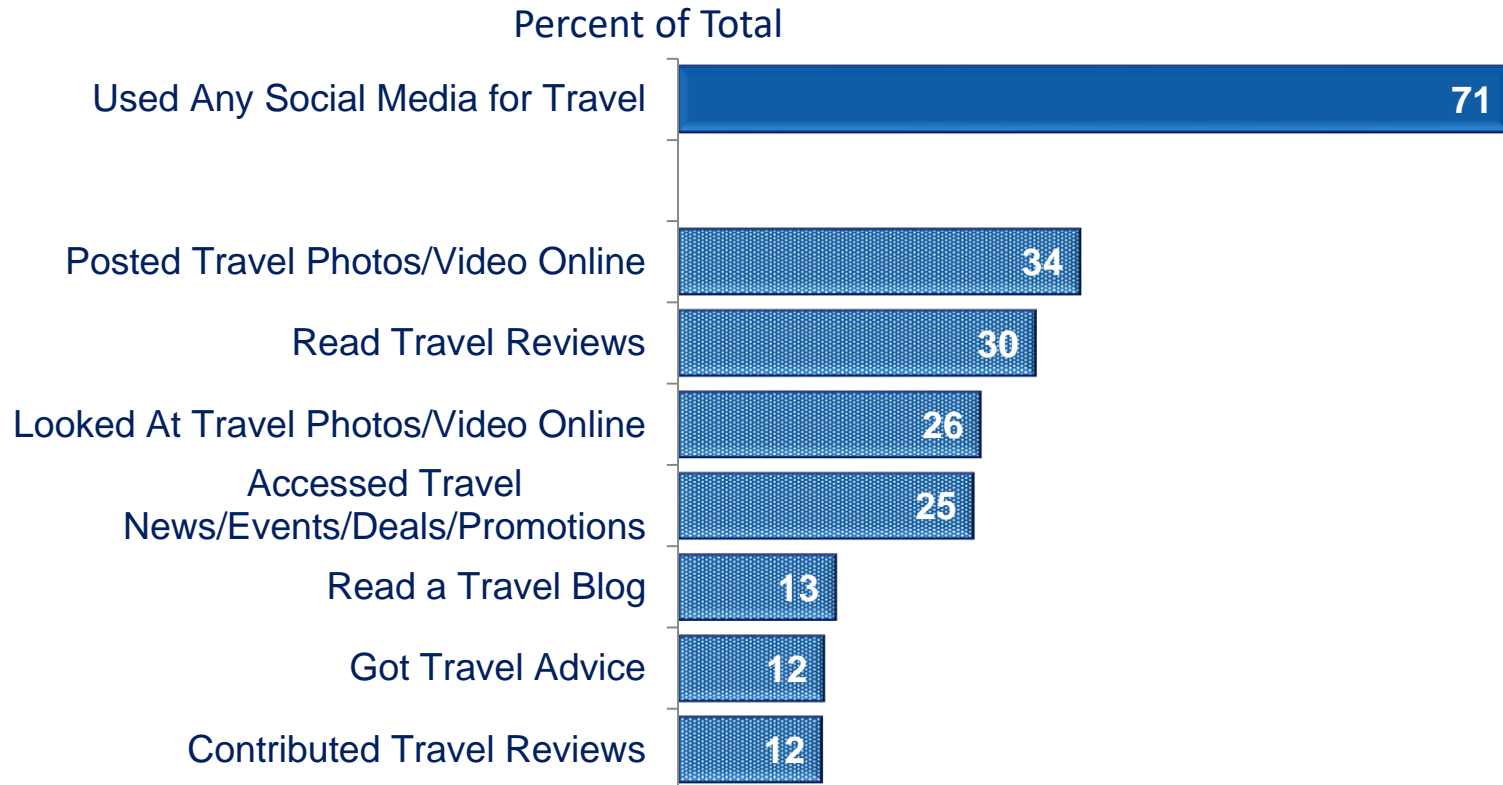




# Online Social Media Use by Pennsylvania Travelers



Base: Marketable Overnight Trips



# Online Social Media Use by Pennsylvania Travelers (cont'd)



Base: Marketable Overnight Trips

Percent of Total



# Travel-Related Social Media Use By Pennsylvania Travelers, By Age



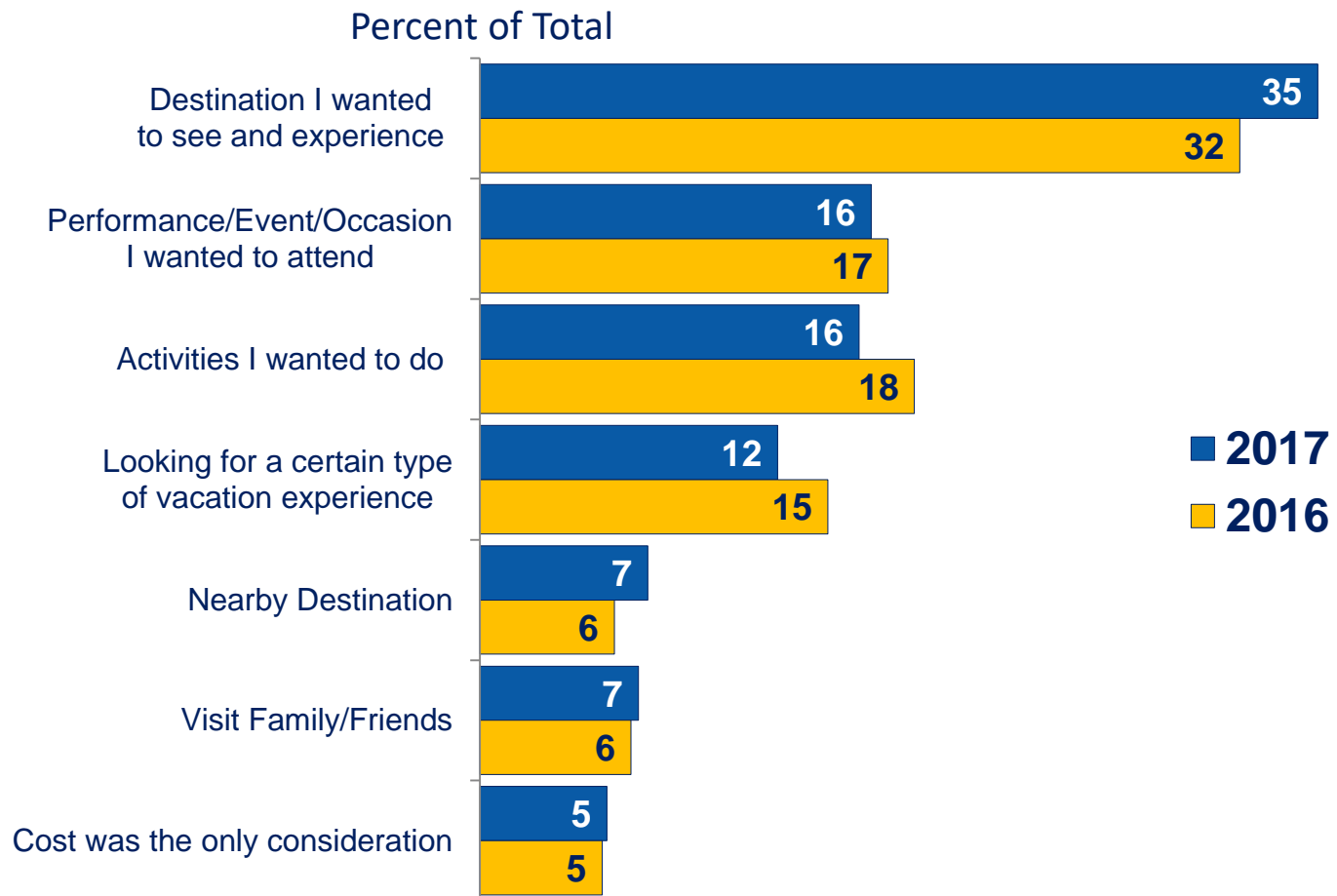
Base: Marketable Overnight Trips

<b>SOCIAL MEDIA USE BY TRAVELER AGE</b>	<b>TOTAL</b>	<b>18-24</b>	<b>25-44</b>	<b>45-64</b>	<b>65+</b>
ANY SOCIAL MEDIA (net)	71%	75%	80%	63%	56%
Posted travel photos or video to a social media or other website that allows media sharing	34%	40%	40%	29%	23%
Read travel reviews posted by users on a public website, such as TripAdvisor.com	30%	23%	32%	30%	33%
Looked at travel-related photos or video using social media or website that allows media sharing	26%	28%	31%	24%	12%
Used a social networking site to learn about travel deals, news, events, or promotions	25%	32%	32%	20%	11%
Read a blog about travel	13%	20%	15%	12%	6%
Got travel advice using a social networking site	12%	13%	15%	12%	5%
Contributed travel reviews to a public website where users provide the content, such as TripAdvisor.com	12%	9%	12%	12%	16%
Used the internet to connect with other people who are interested in travel	11%	10%	14%	9%	9%
Joined the Facebook Fan page or Twitter feed for a specific travel destination or attraction	11%	20%	14%	8%	3%
Gave travel advice using a social networking site	9%	10%	11%	8%	4%
Tweeted about a recent trip	6%	12%	8%	3%	1%
Subscribed to an e-newsletter about travel	5%	1%	6%	6%	5%
Blogged about a recent trip	4%	9%	5%	1%	1%

# Planning Considerations Beyond Cost



Base: Marketable Overnight Trips

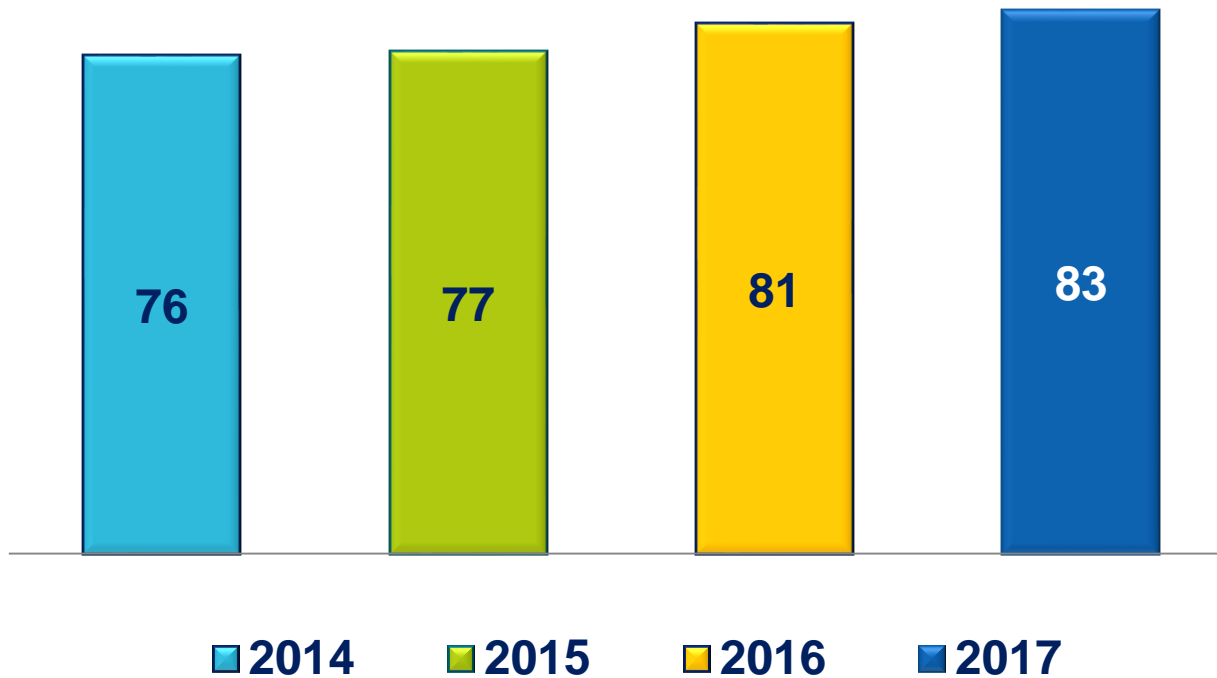


# Percent of Travelers Booking In Advance



Base: Marketable Overnight Trips

Percent of Total

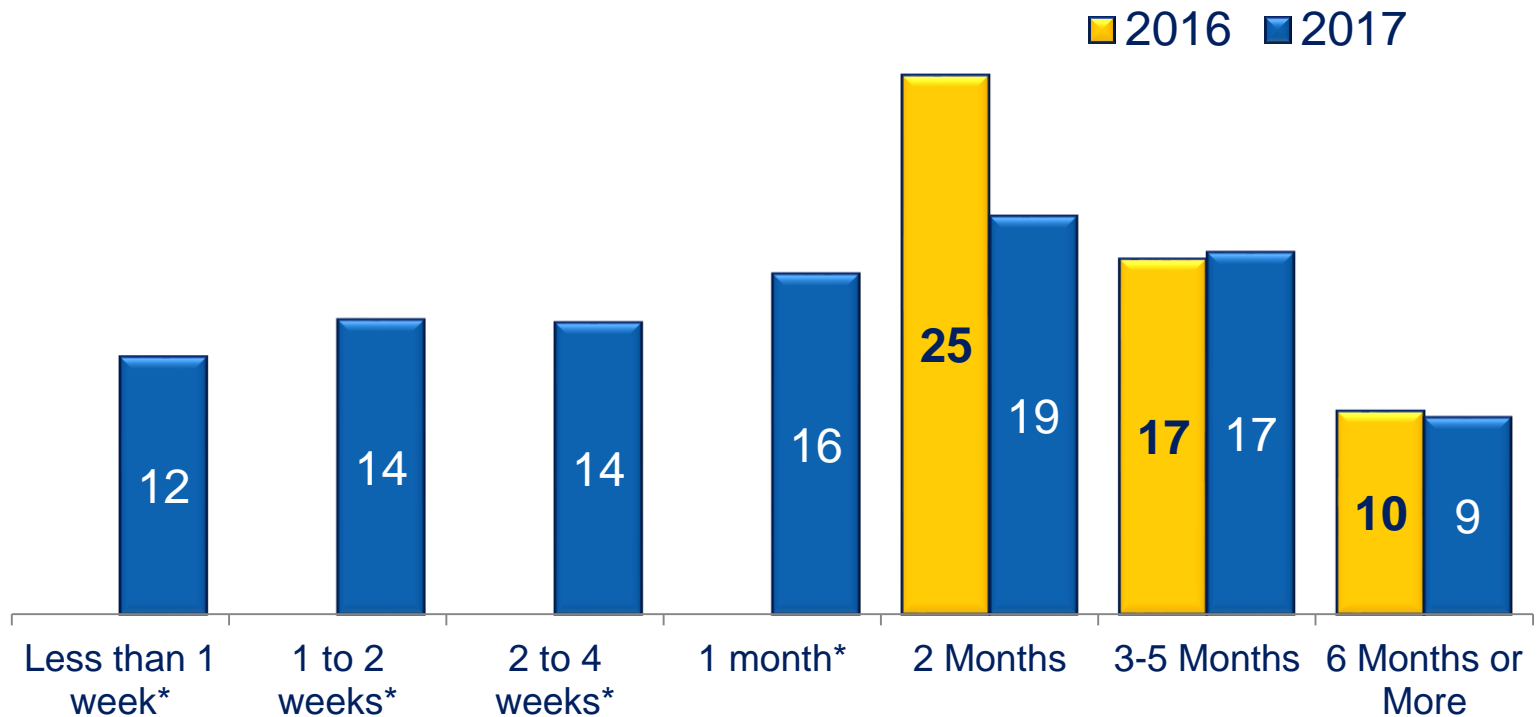


# Booking Cycle



Base: Marketable Overnight Trips

Percent of Total



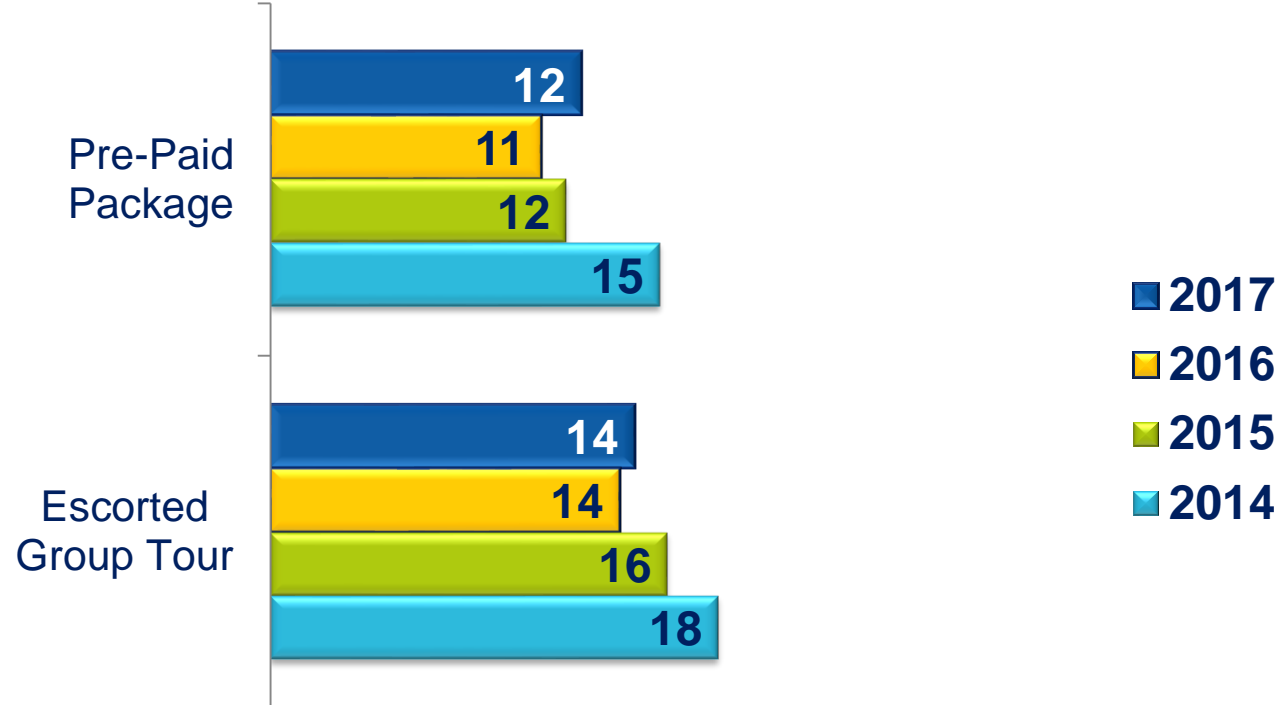
\*Wording changed on survey questionnaire in 2017 to provide more detail for shorter time frames.

# Use of Vacation Packages and Group Travel



Base: Marketable Overnight Trips

Percent of Total



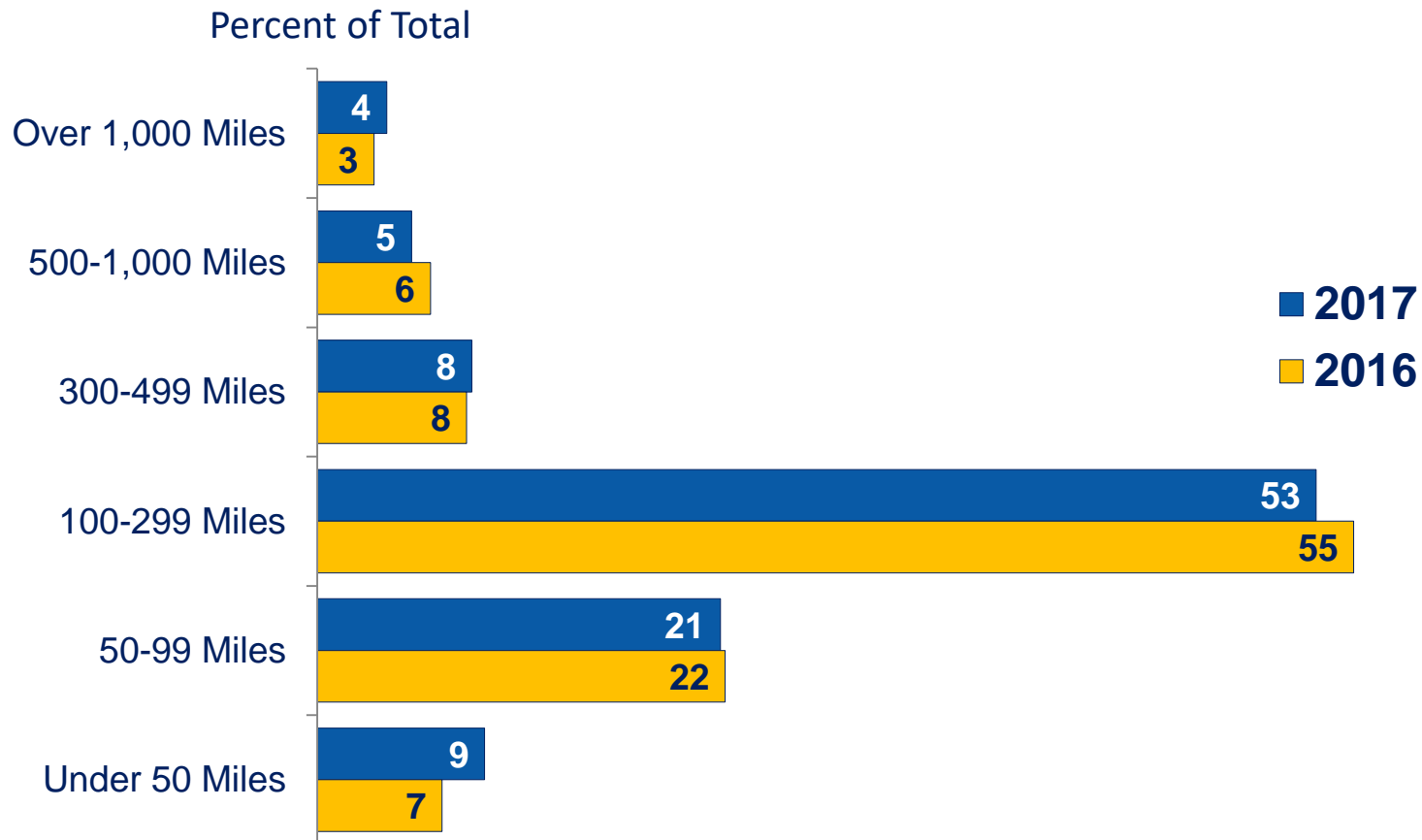
# **Trip Characteristics of Pennsylvania's 2017 Marketable Overnight Travelers**



# Distance Traveled to Pennsylvania



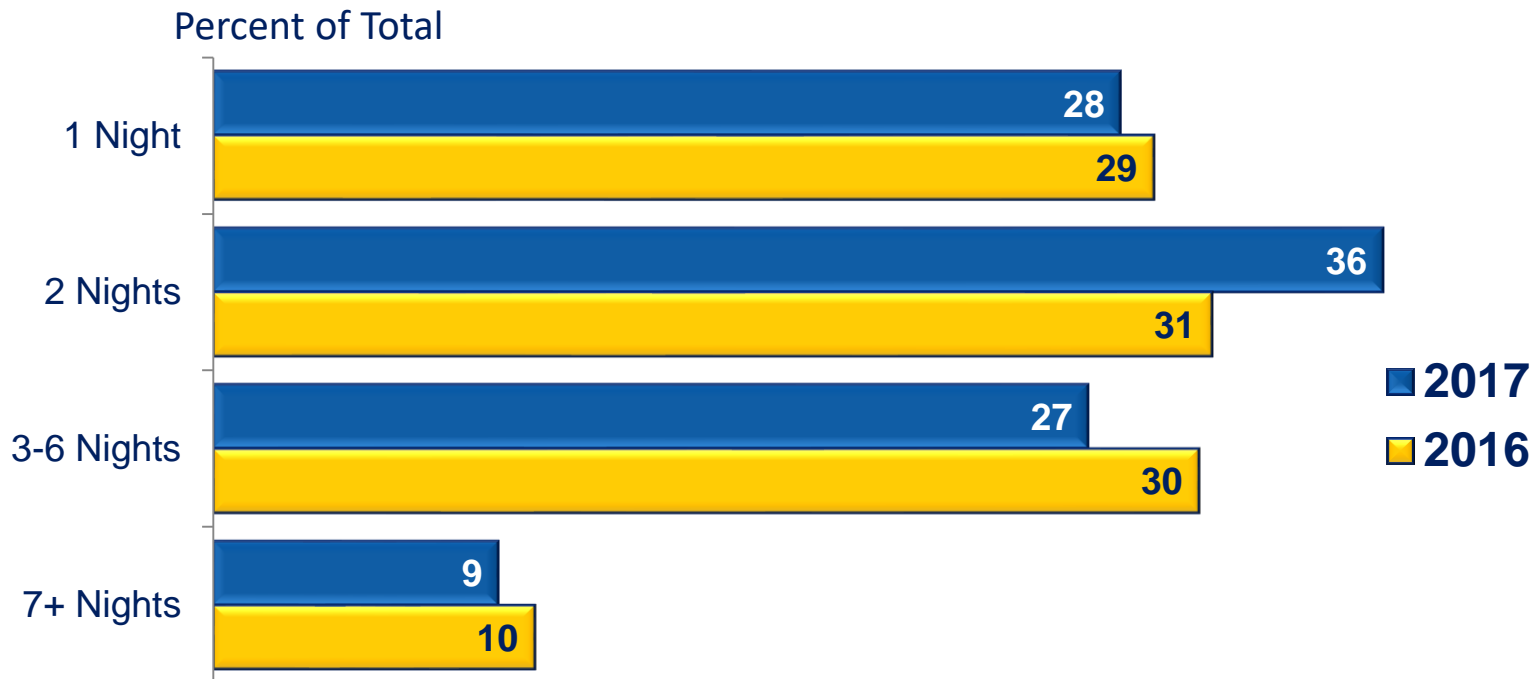
Base: Marketable Overnight Trips



# Total Nights Away From Home



Base: Marketable Overnight Trips

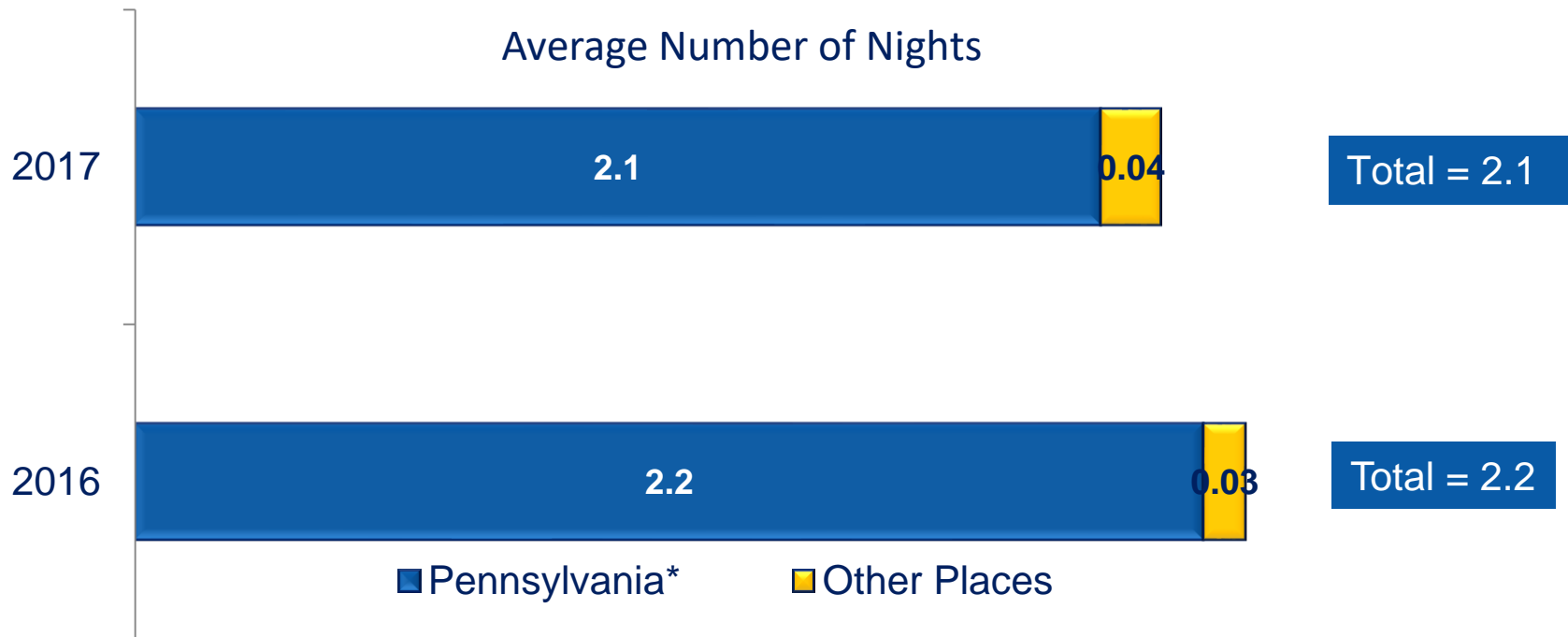


Average Number of Nights	2014	2015	2016	2017
	3.0	3.4	3.3	3.1

# Length of Stay



Base: Marketable Overnight Trips

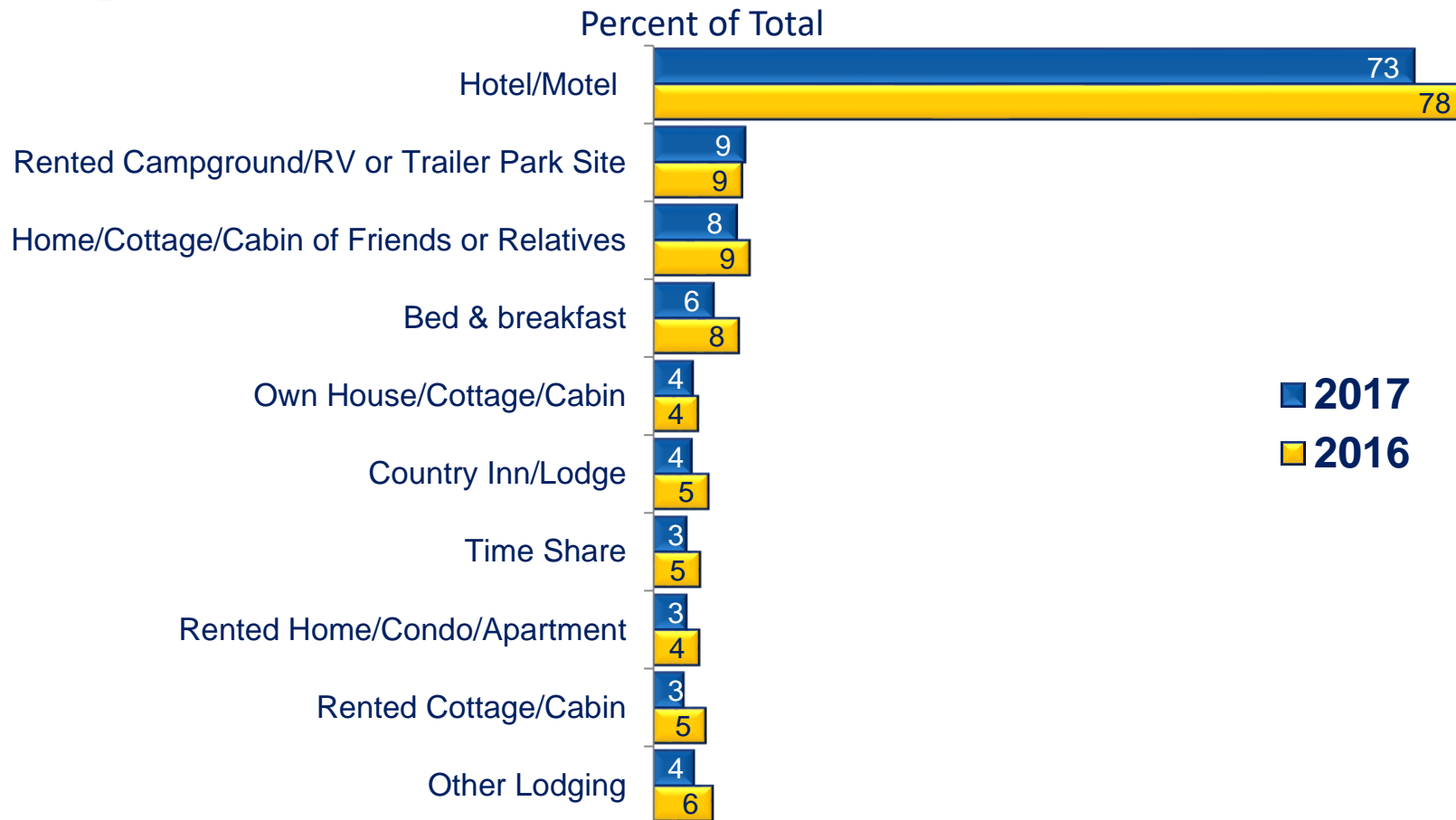


\* Those who spent at least one night anywhere in Pennsylvania.

# Lodging\*



Base: Marketable Overnight Trips

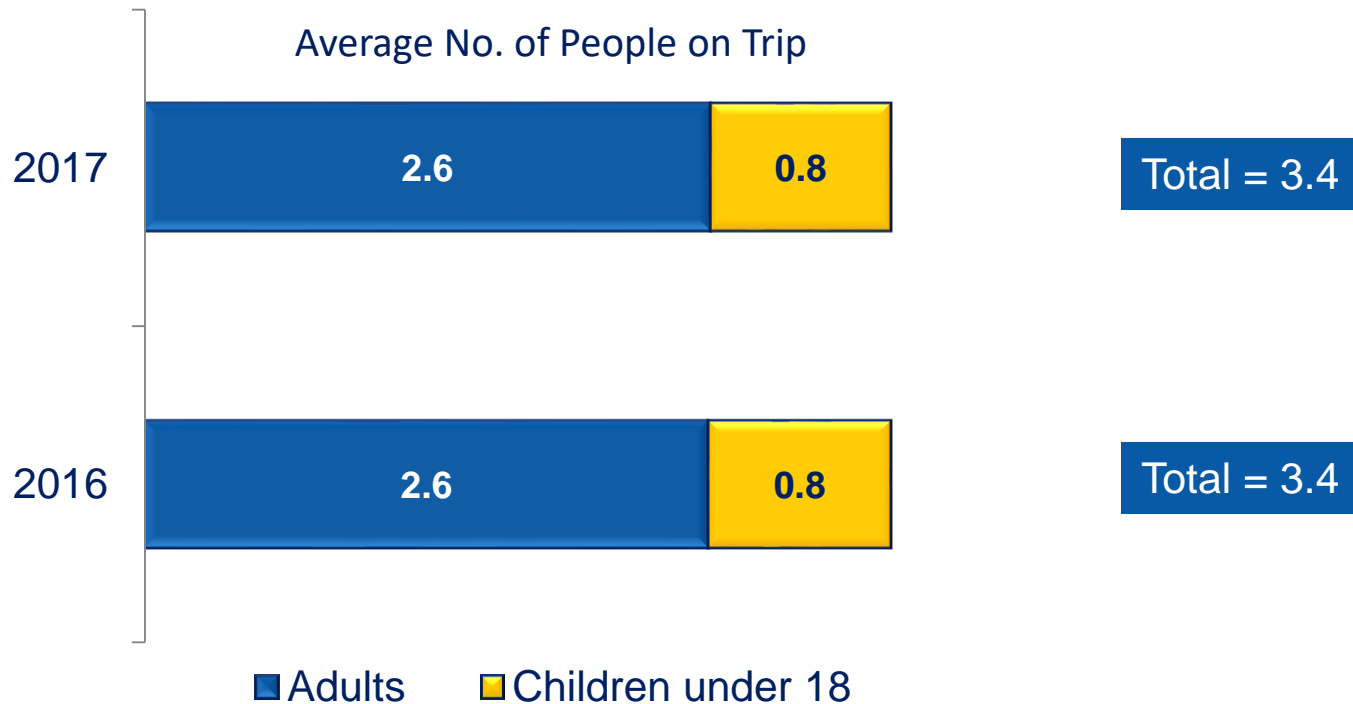


\* Percent of trip nights spent in each type of lodging

# Average Size of Pennsylvania Travel Parties



Base: Marketable Overnight Trips

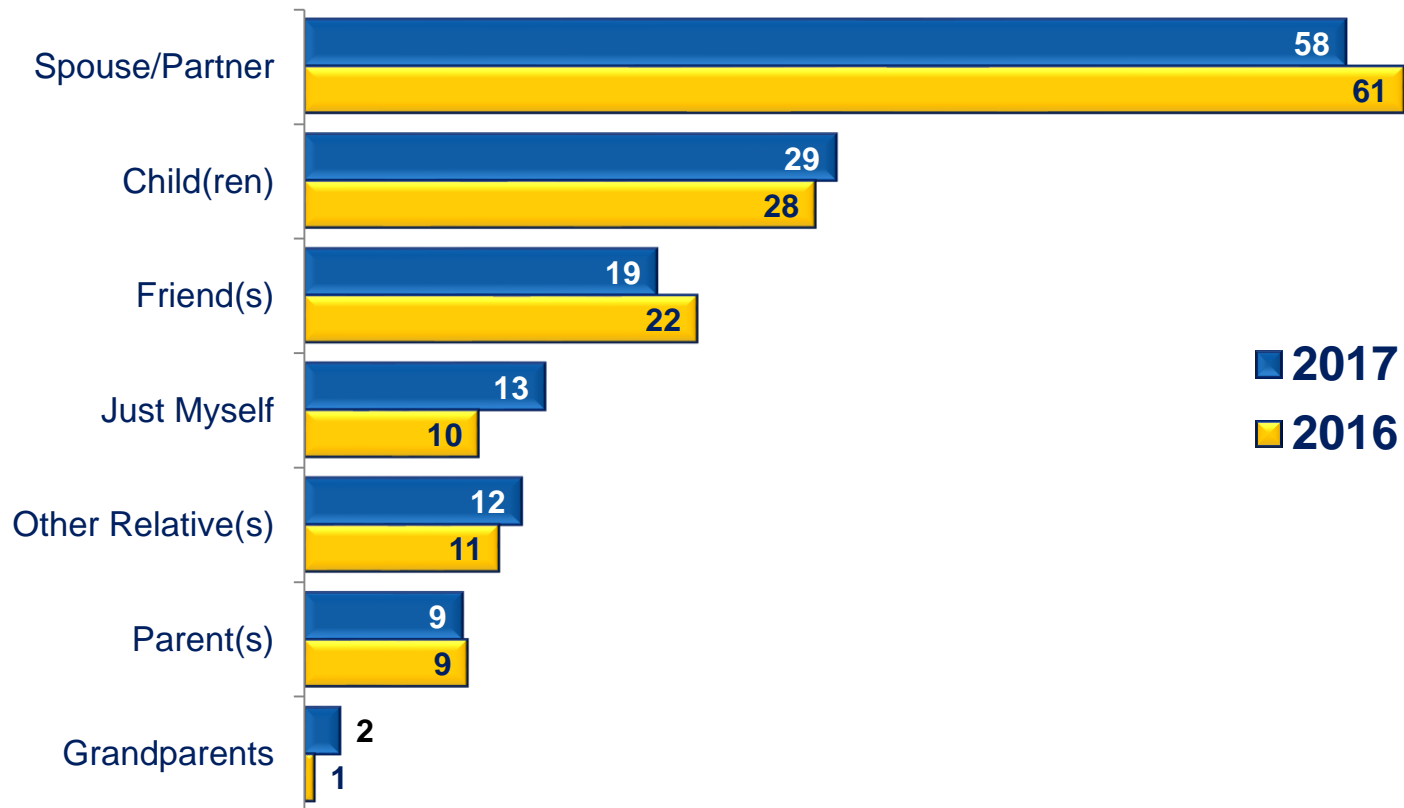


# Composition of Travel Party



Base: Marketable Overnight Trips

Percent of Total

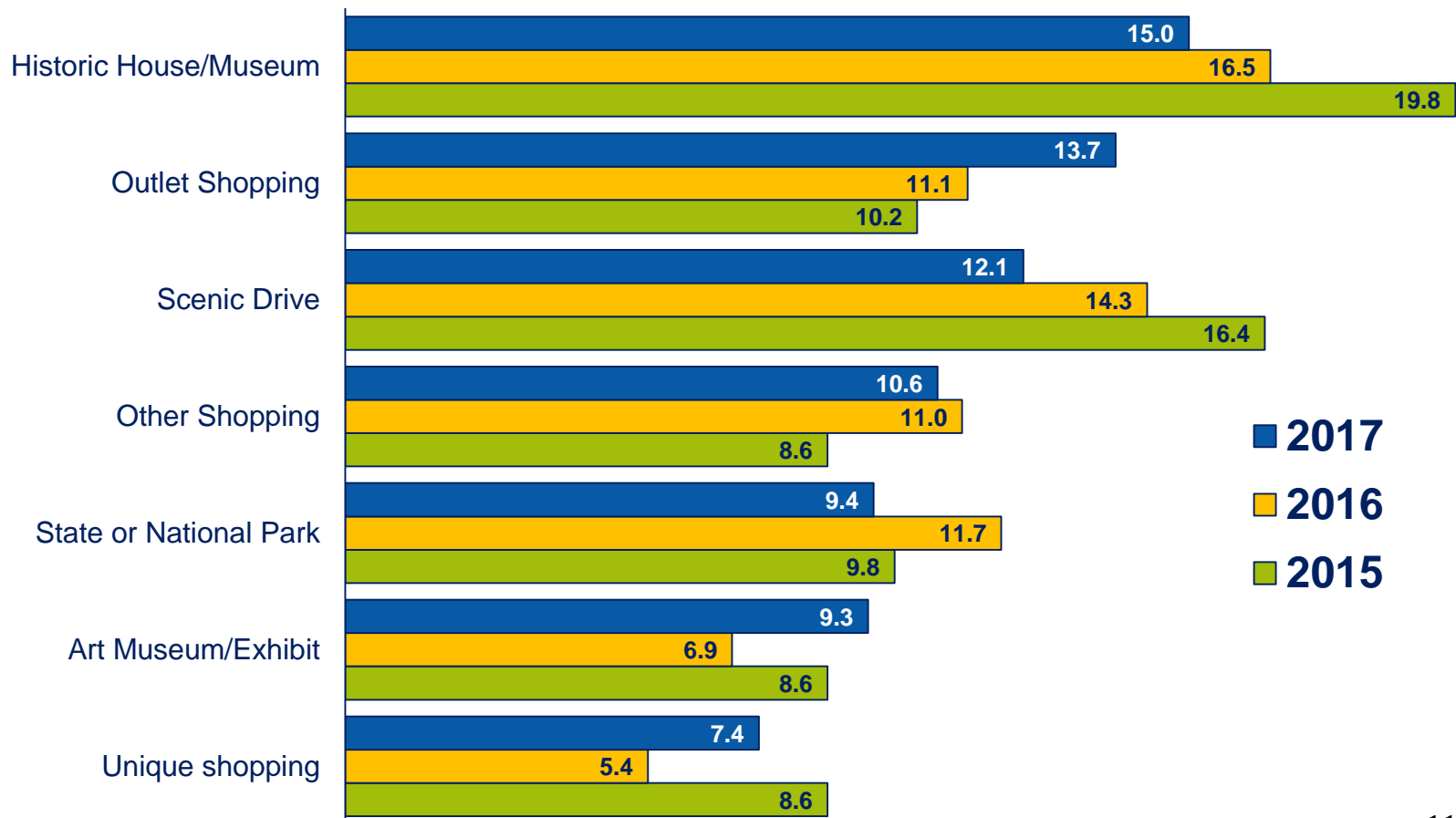


# **Trip Experiences — 2017 Marketable Overnight Trips**

# Things Seen and Experienced on PA Trip

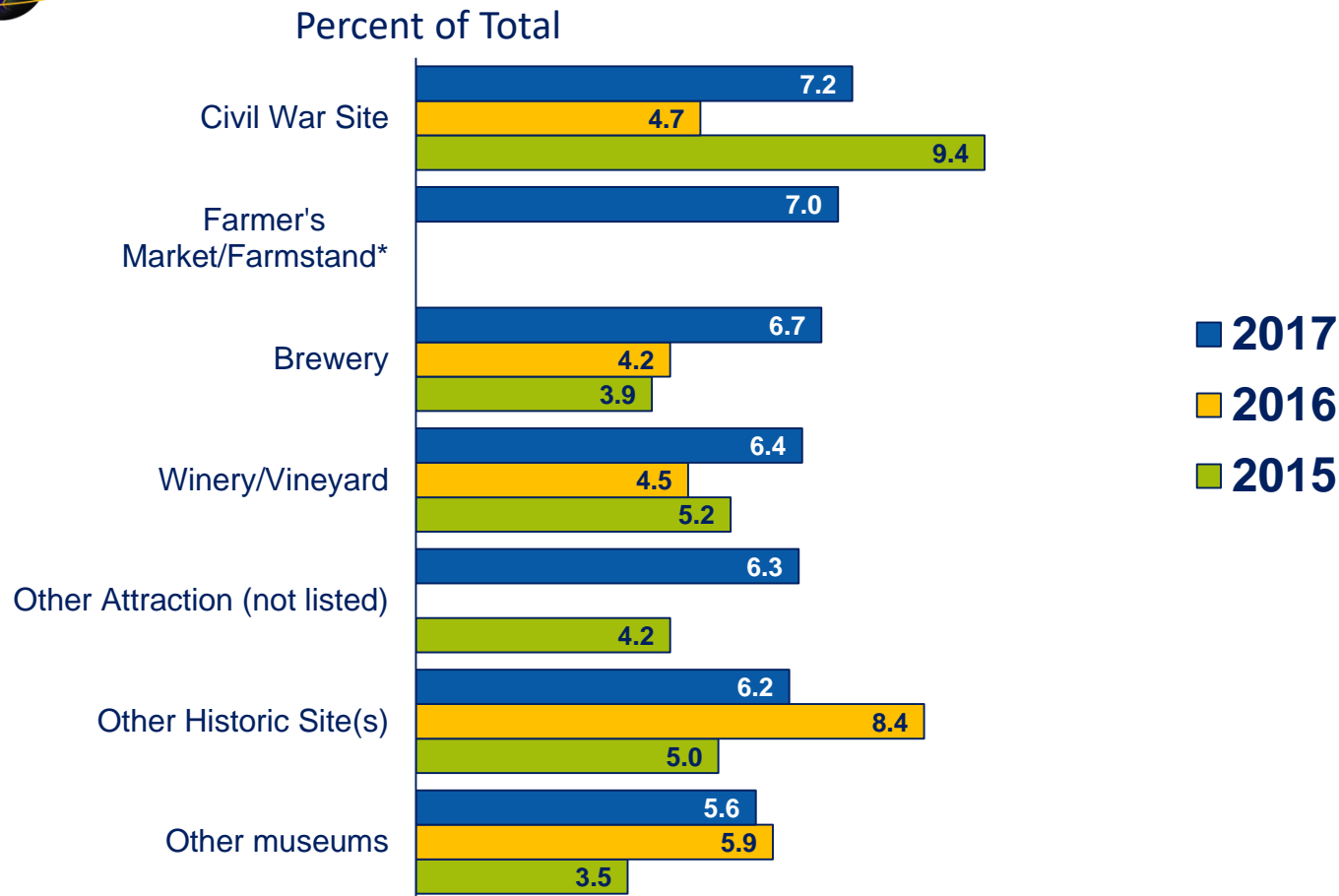


Percent of Total



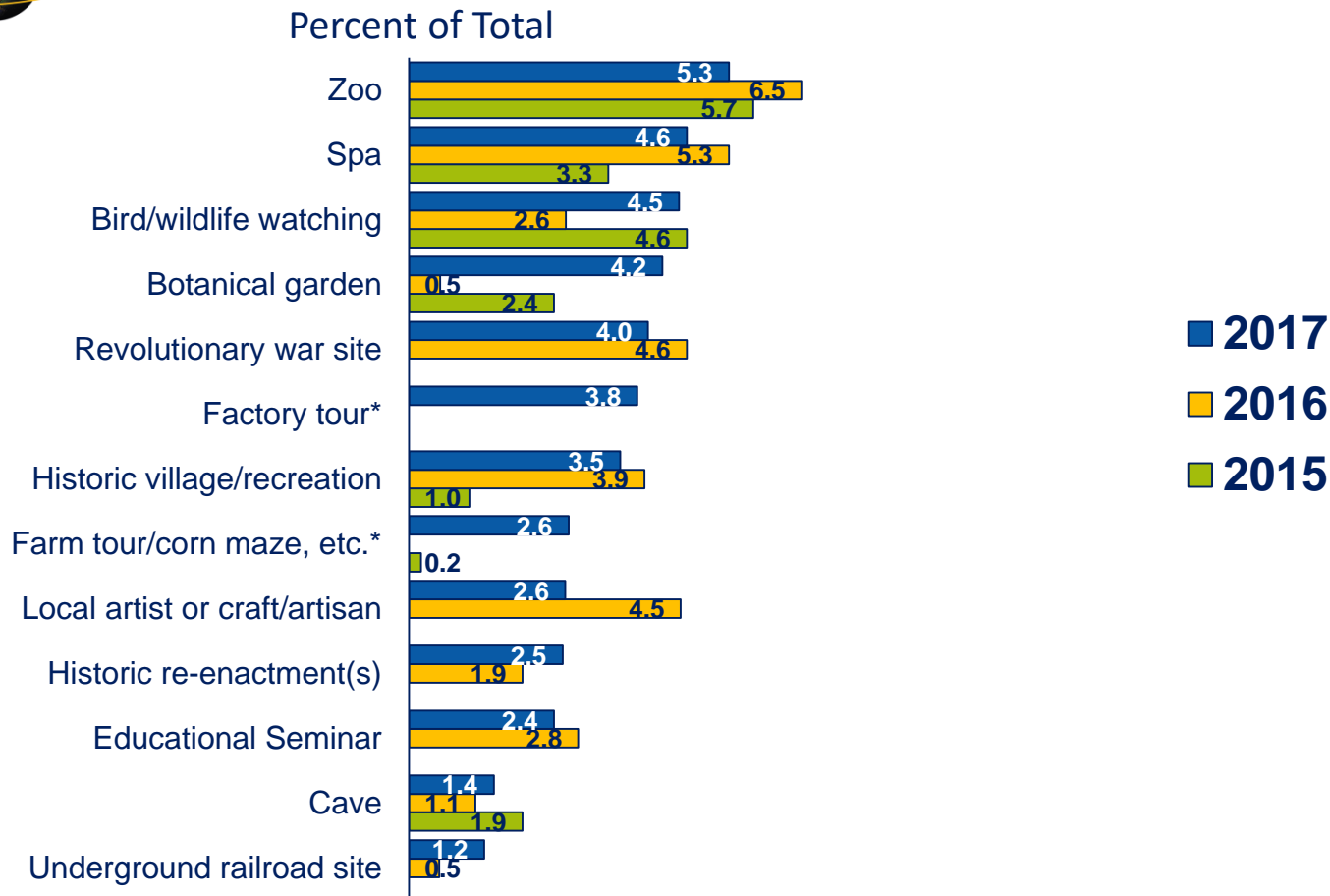


# Things Seen and Experienced on PA Trip (cont'd)



\*Category Added in 2017

# Things Seen and Experienced on PA Trip (cont'd)

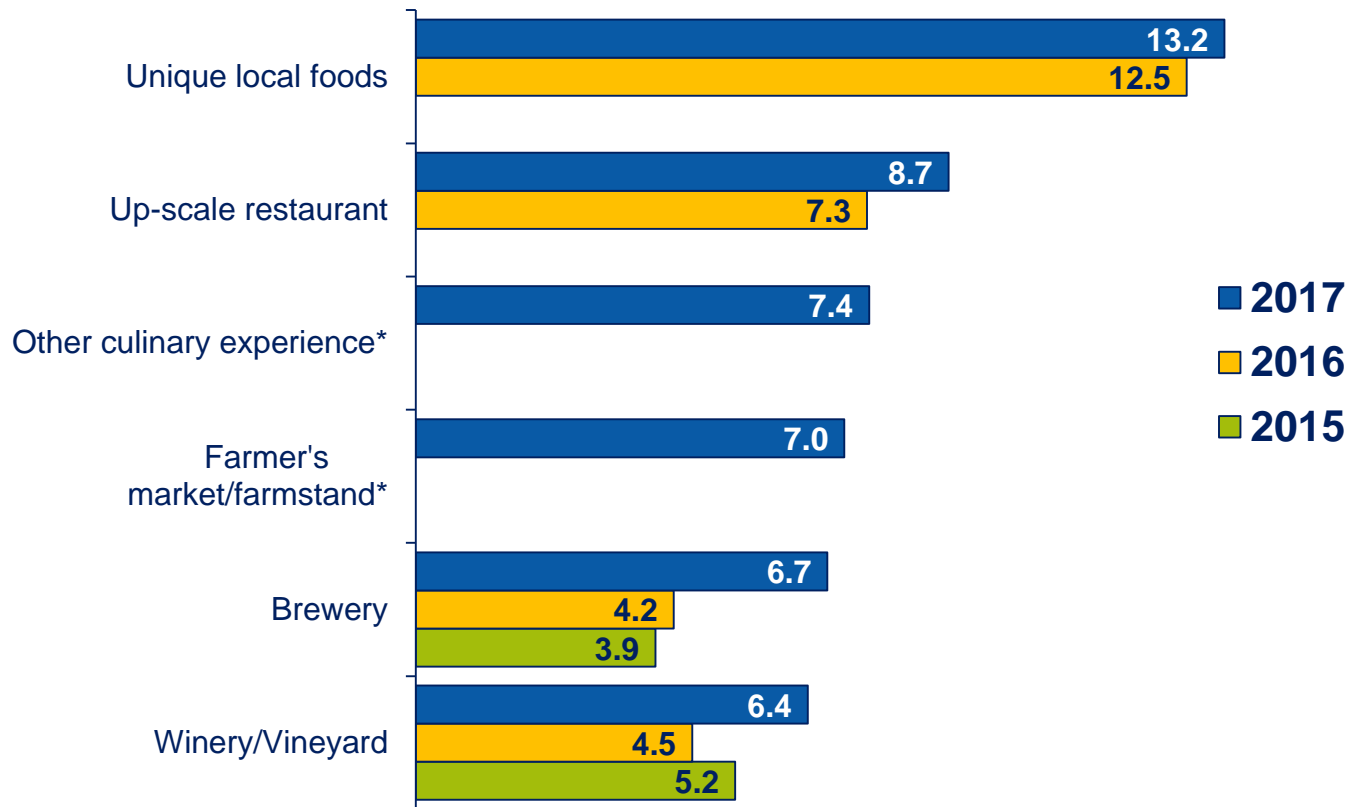


\*Category Added in 2017

# Dining



Percent of Total

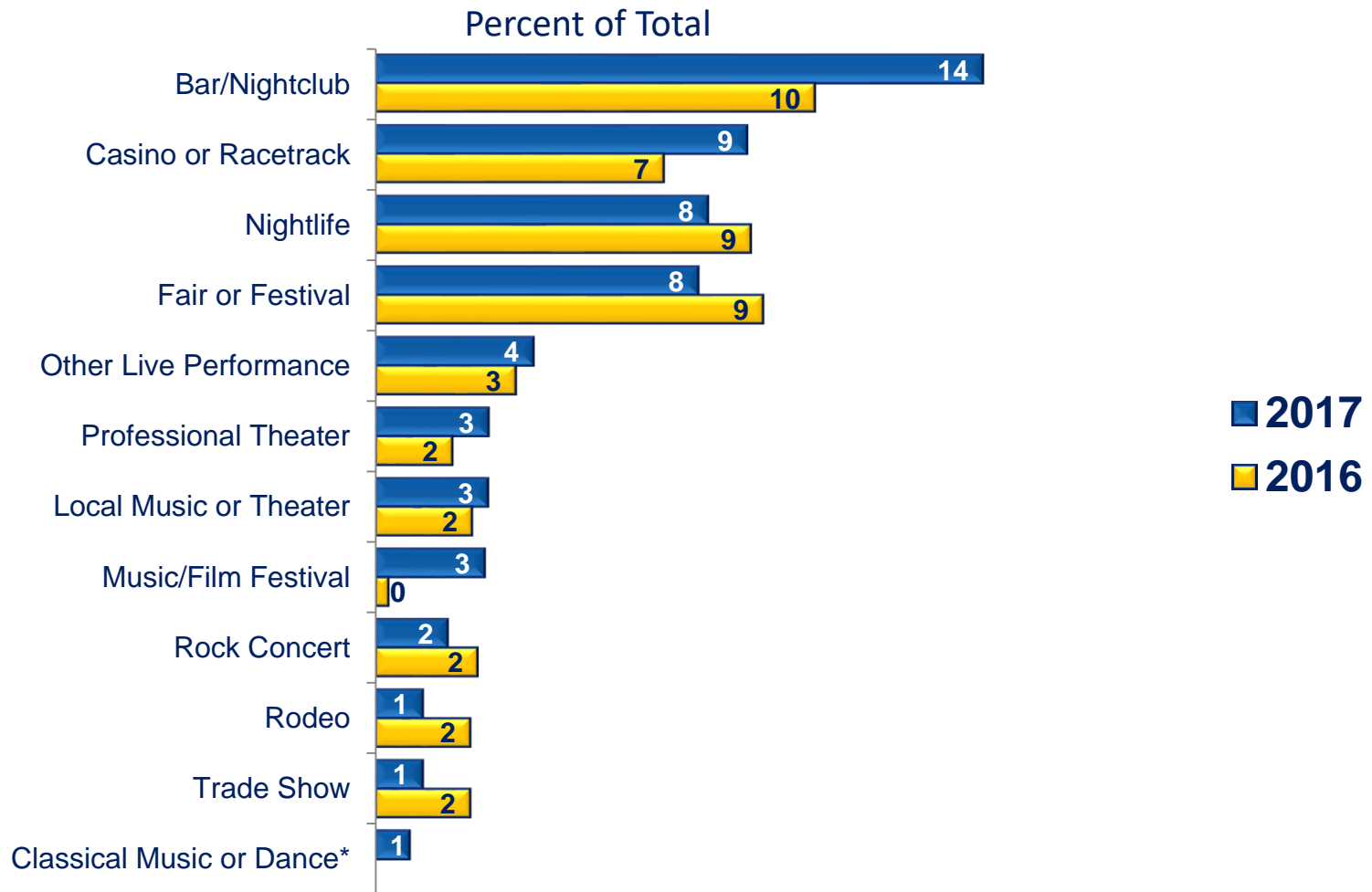


\*Category added in 2017.

# Entertainment



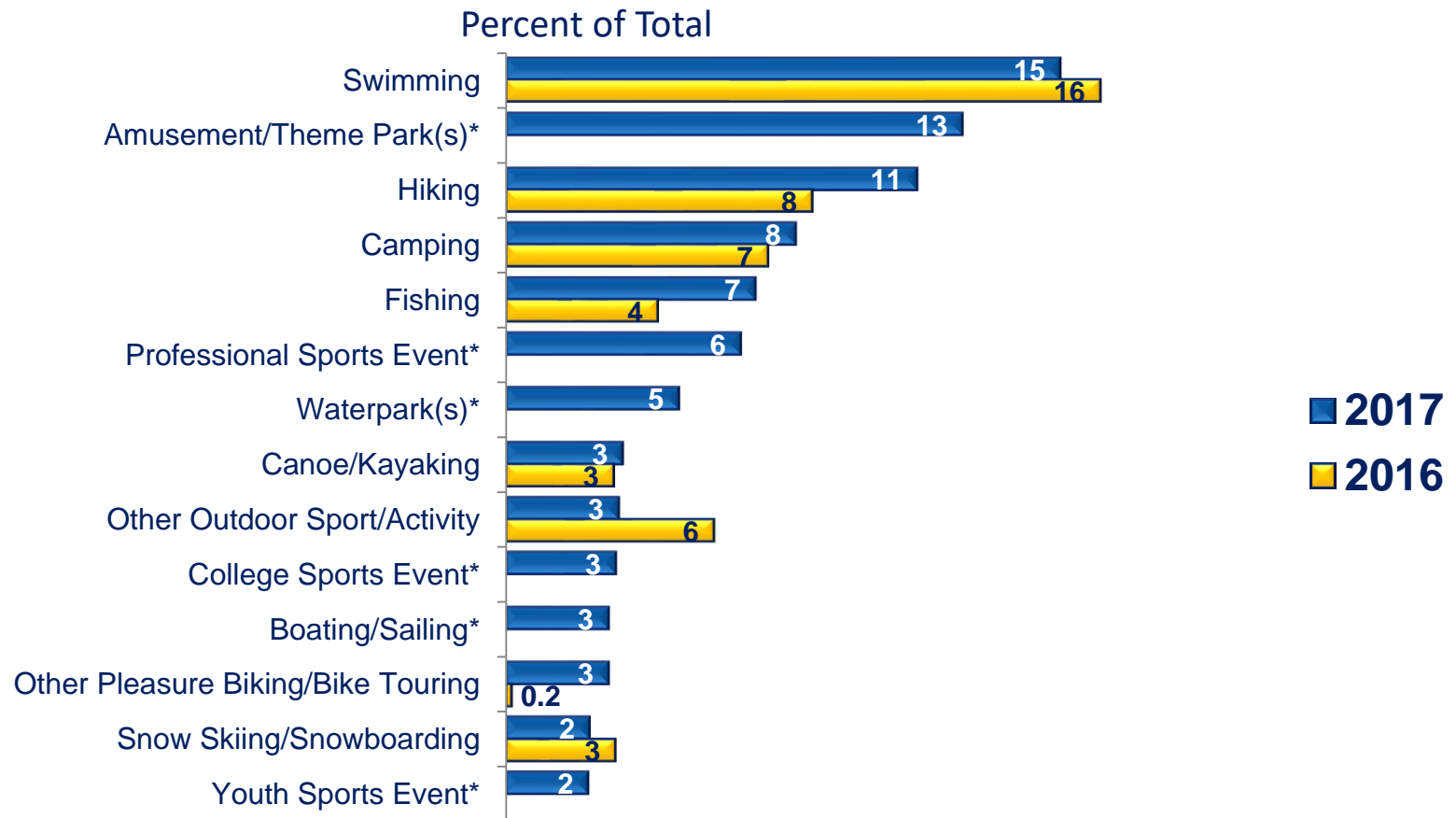
Base: Marketable Overnight Trips



# Sports and Recreation



Base: Marketable Overnight Trips



\*Category added in 2017.

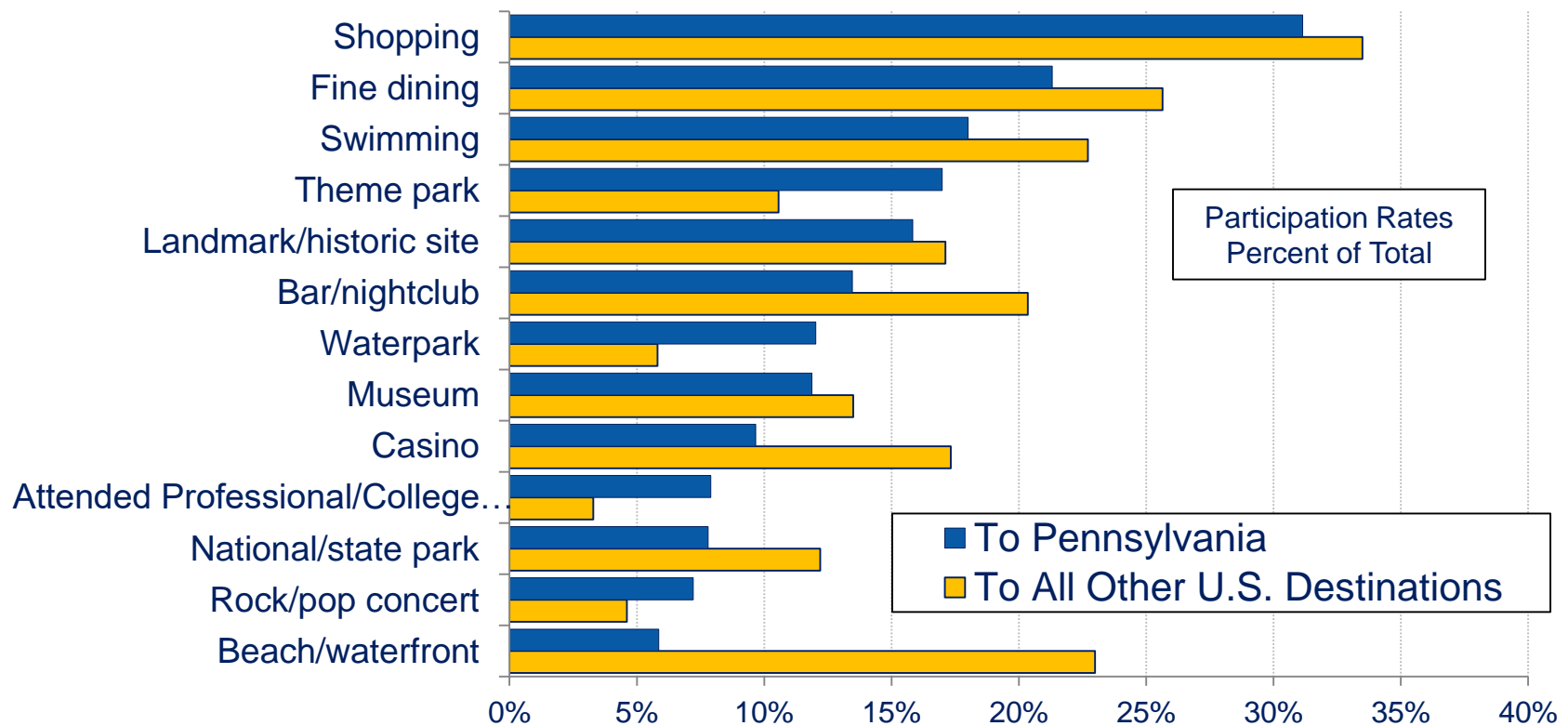
# **Activities by Origin Market of Marketable Overnight Travelers, 2017**

# Main Activities of NEW YORK Travelers Visiting PA vs. All Other U.S. Destinations



Base: Marketable Overnight Trips

*Pennsylvania has a distinct advantage in attracting NY travelers interested in theme parks and water parks relative to other U.S. destinations, but far less in other types of activities.*

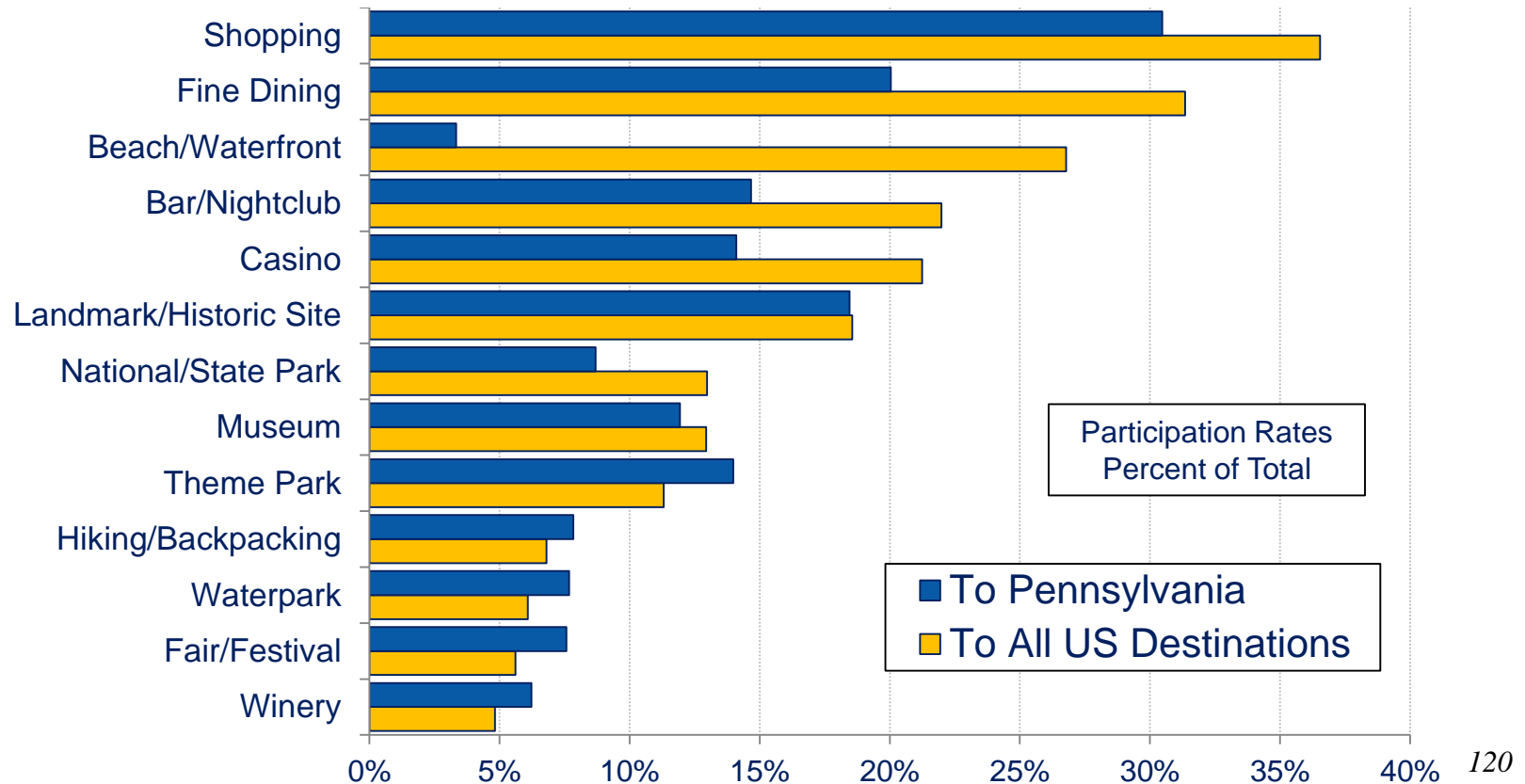


# Main Activities of NEW JERSEY Travelers Visiting PA vs. All Other U.S. Destinations



Base: Marketable Overnight Trips

*Pennsylvania has a slight advantage over other US destinations in attracting NJ travelers who are interested in theme parks, hiking/backpacking fairs/festivals, and wineries.*



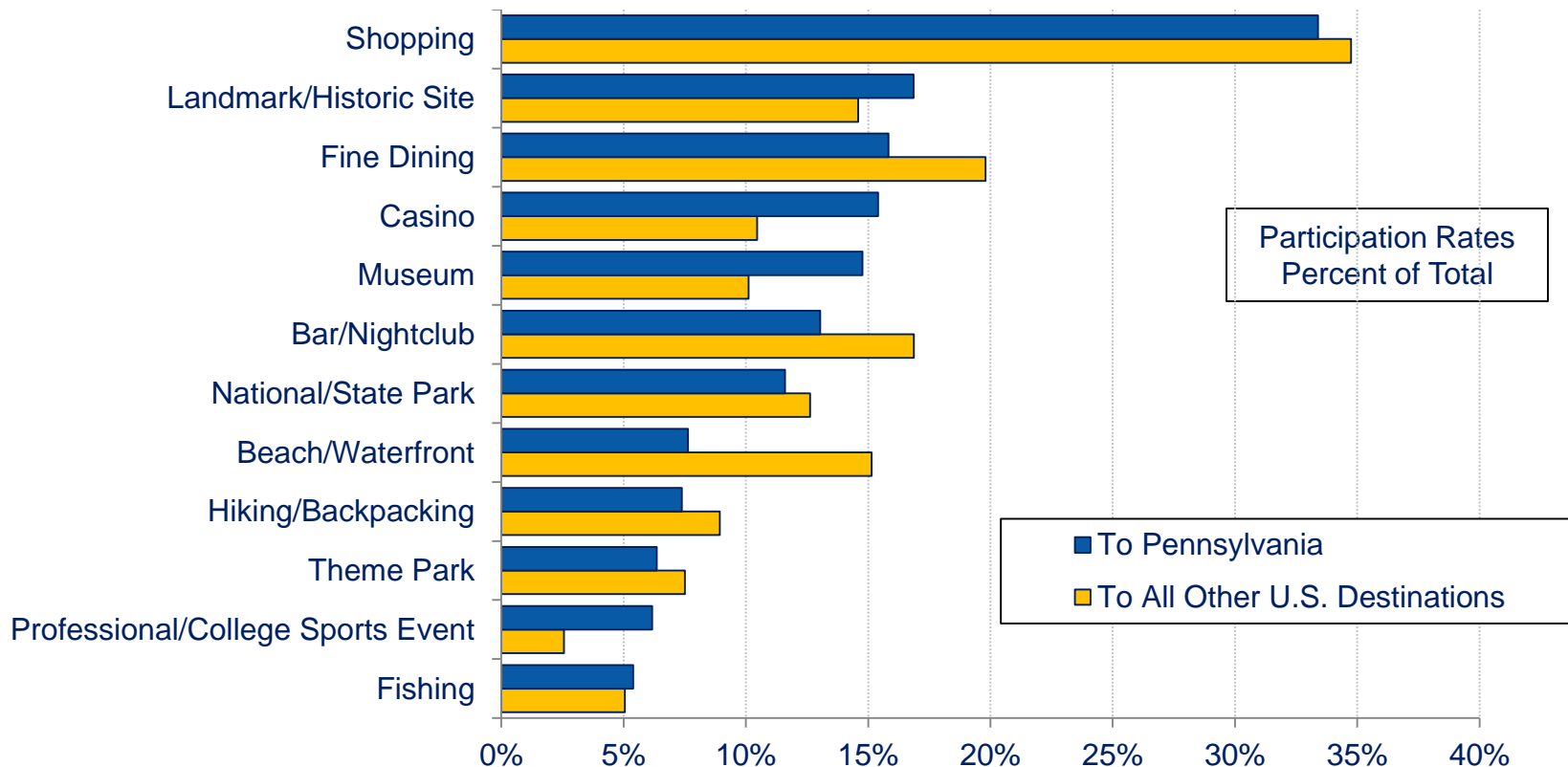


# Main Activities of OHIO Travelers Visiting PA vs. All Other U.S. Destinations



Base: Leisure Overnight Trips

*Pennsylvania has an advantage over other U.S. destinations in attracting OH travelers interested in museums, historic sites, casinos, and professional or college sports events.*

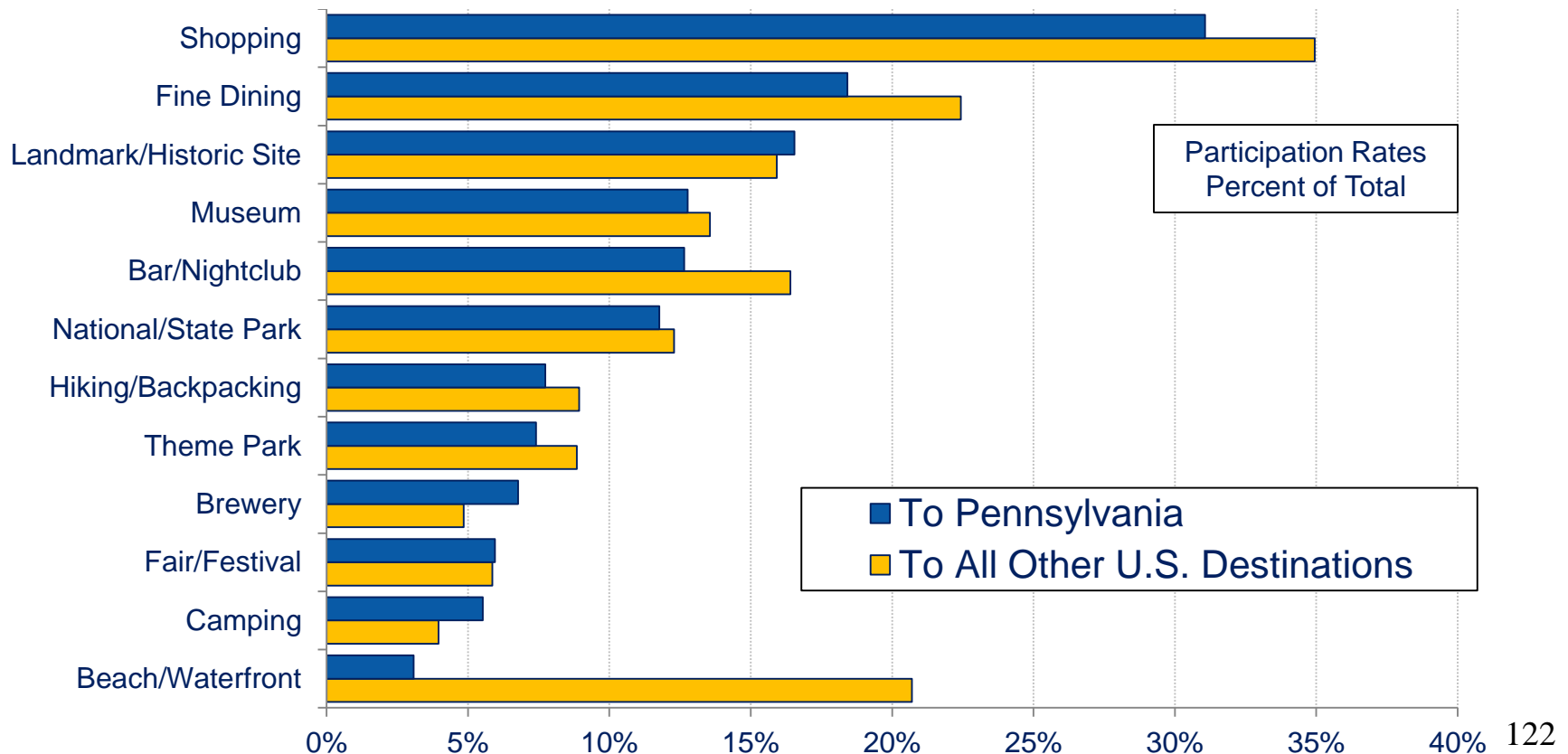


# Main Activities of MARYLAND Travelers Visiting PA vs. All Other U.S. Destinations



Base: LEISURE Overnight Trips

*Pennsylvania has a slight advantage over other U.S. destinations in attracting MD leisure travelers interested in historic sites, breweries, fairs/festivals, and camping.*

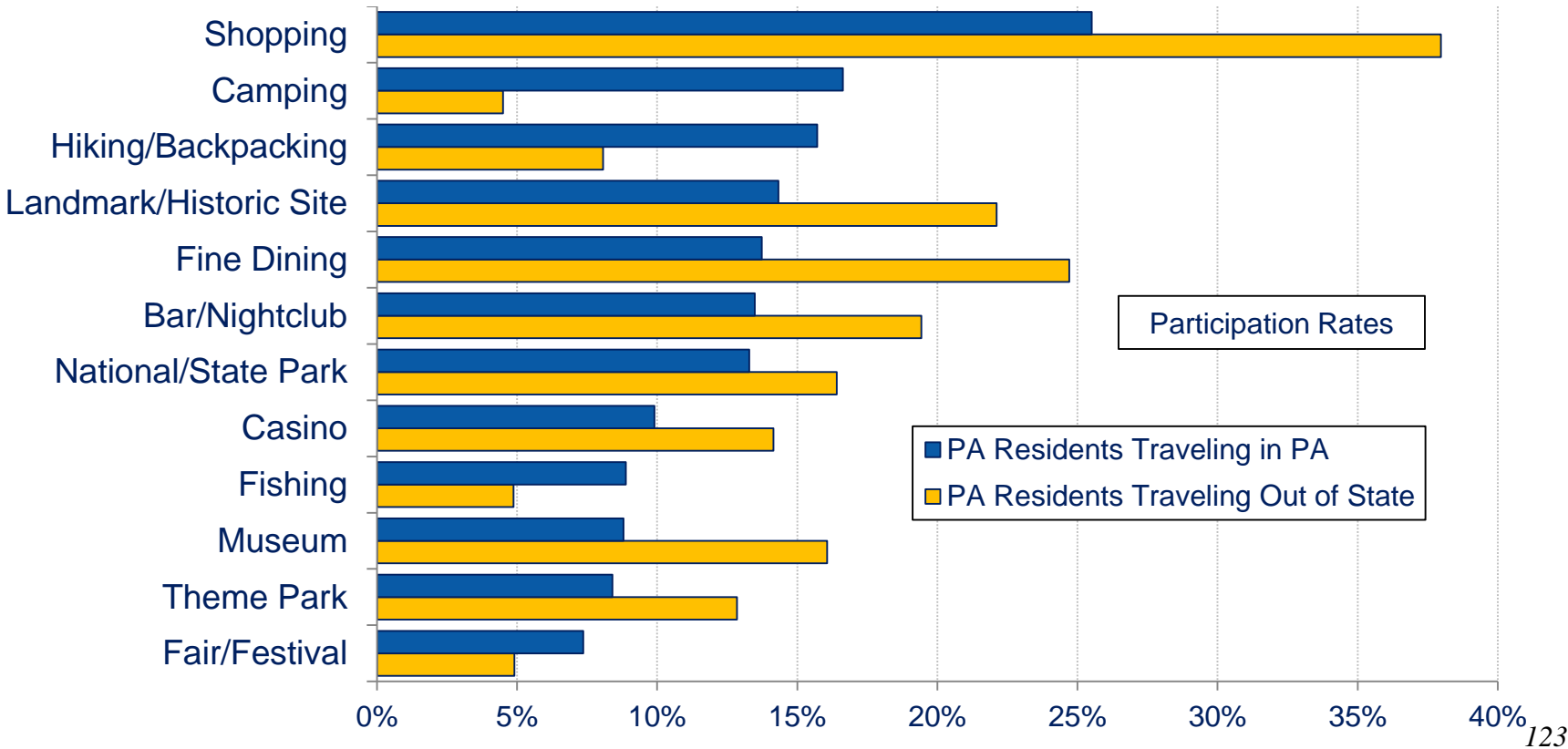


# Main Activities of PENNSYLVANIA Travelers in Pennsylvania vs to All Other U.S. Destinations



Base: Marketable Overnight Trips

*Pennsylvanians typically participate in more activities while on an out-of-state leisure trip compared to a trip within the state, except for hiking, camping, fishing, and fairs/festivals.*



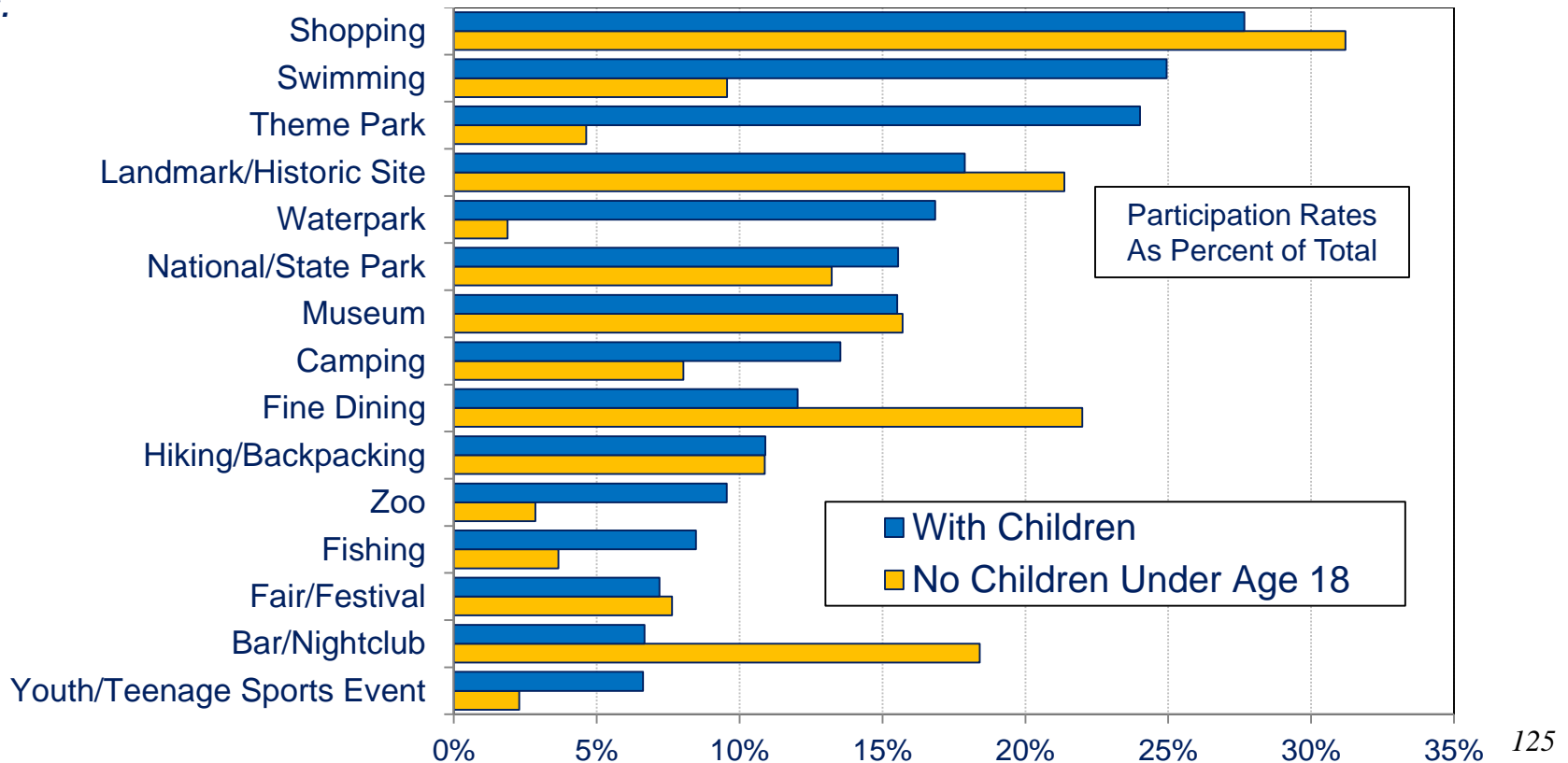
# **Activities by Presence/Absence of Children on Pennsylvania Leisure Trip**

# Comparison of Activity Levels for Travelers With and Without Children on PA Trip, 2017



Base: Marketable Overnight Trips

*Travelers with children are far more likely to visit a PA theme park, waterpark, or zoo and enjoy outdoor activities, while those without children are more likely to enjoy fine dining and historic sites.*

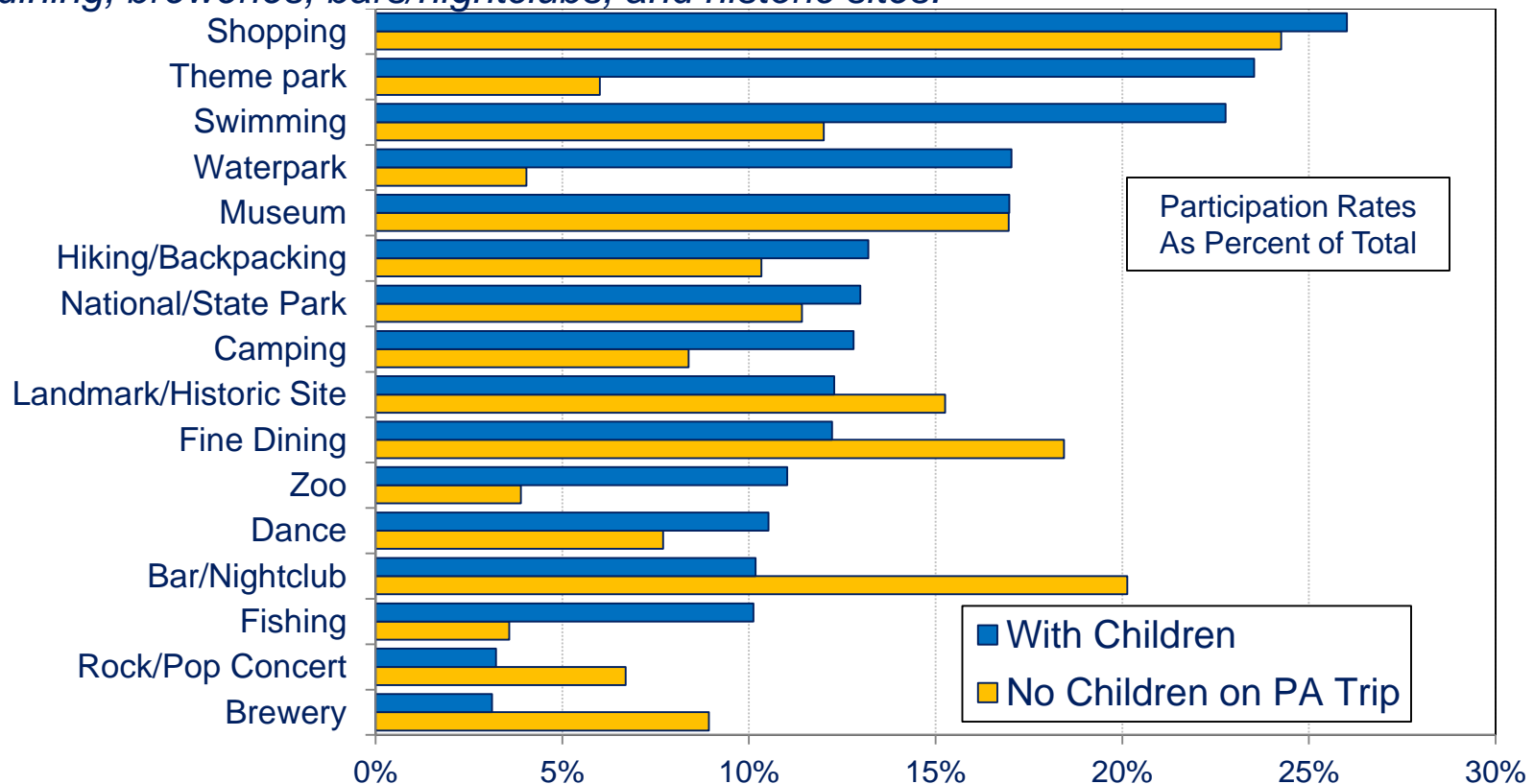


# Activity Participation Rates for Travelers 18-34 Years of Age With and Without Children on PA Trip, 2017



Base: Marketable Overnight Trips

*Younger travelers with children on their PA trip were far more likely to visit a PA theme park, waterpark, and enjoy outdoor activities, while those without children were more likely to enjoy fine dining, breweries, bars/nightclubs, and historic sites.*

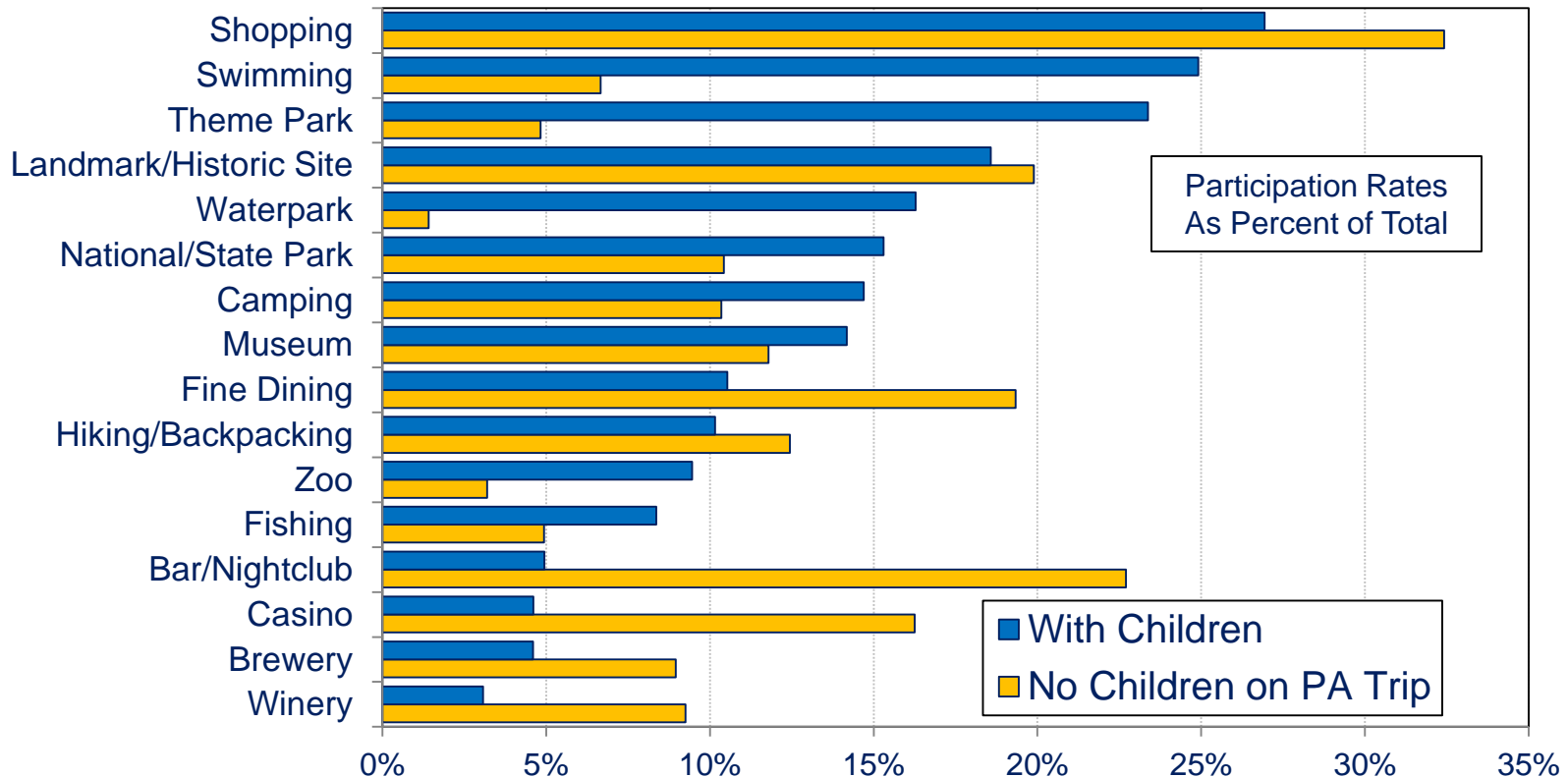


# Activity Participation Rates for Travelers 35-54 Years of Age With and Without Children on PA Trip, 2017



Base: Marketable Overnight Trips

*Middle-age travelers with children on their PA trip were far more likely to visit a PA theme park, waterpark, and enjoy outdoor activities, while those without children were more likely to enjoy fine dining, breweries, wineries, and bars/nightclubs.*

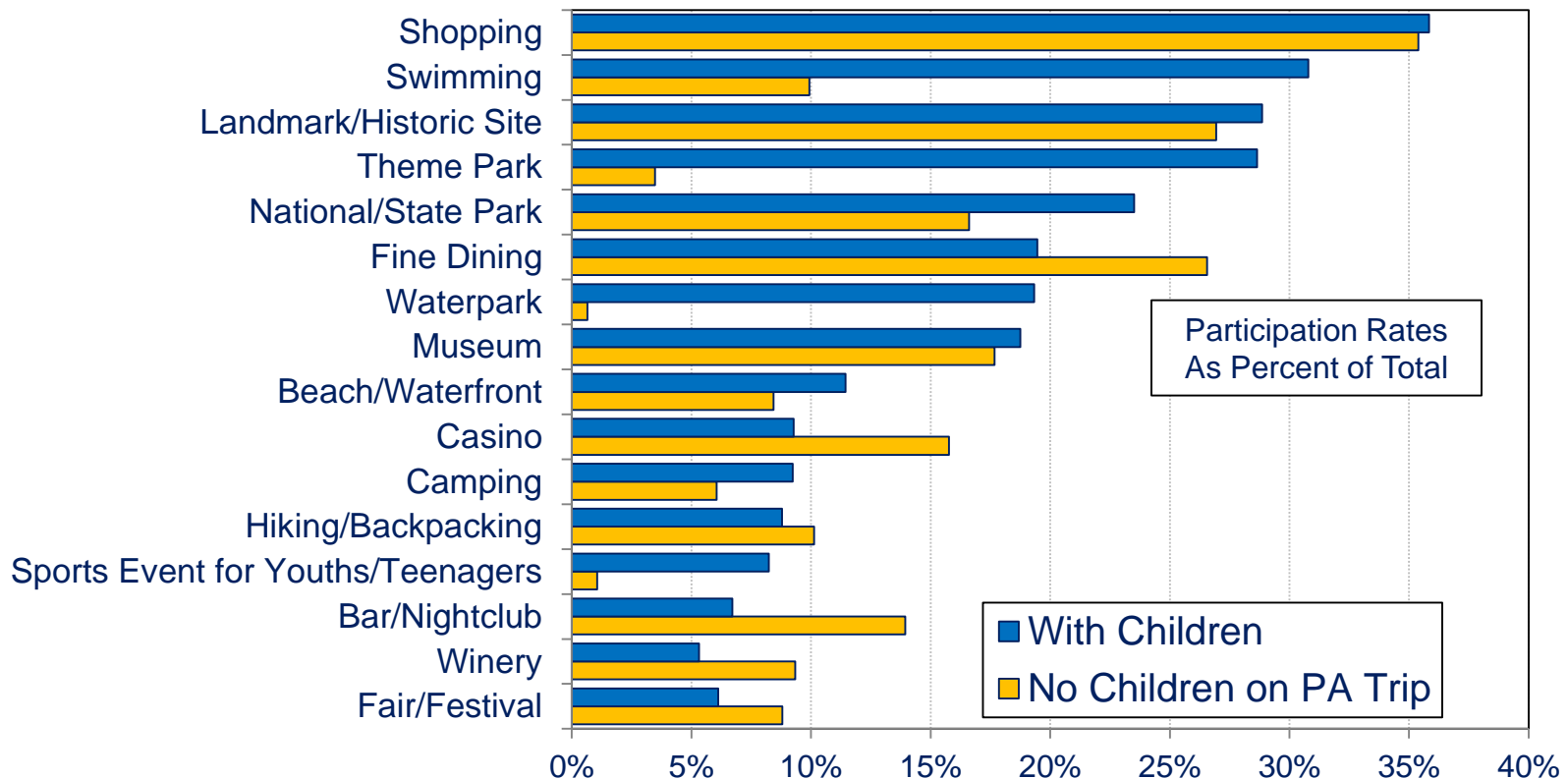


# Activity Participation Rates for Travelers 55+ Years of Age With and Without Children on PA Trip, 2017



Base: Marketable Overnight Trips

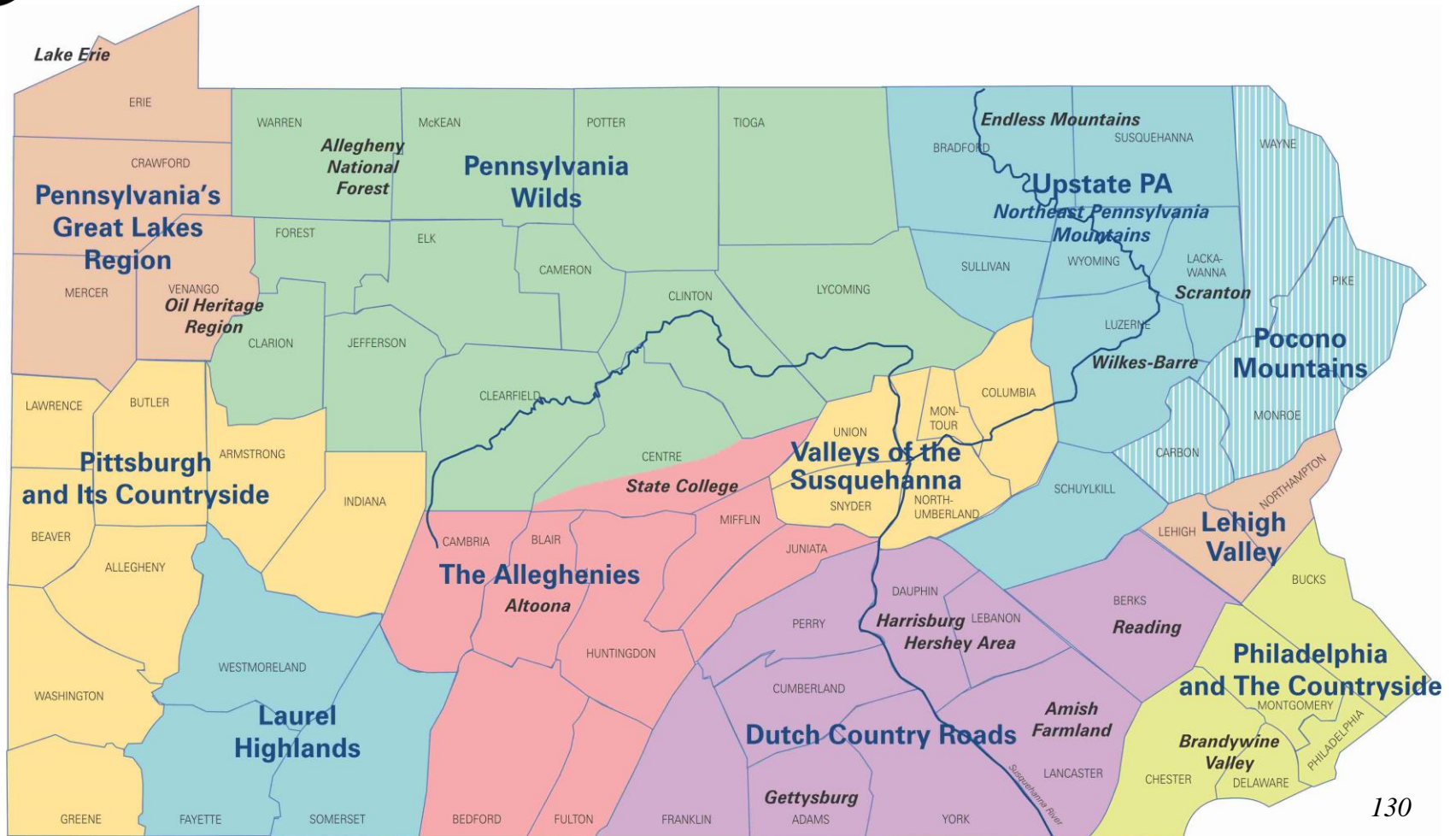
*Older travelers with children on their PA trip were far more likely to visit a PA theme park, waterpark, and national or state park, while those without children were more likely to enjoy fine dining, casinos, wineries, bars and nightclubs, and fairs and festivals.*





# **Regional Attractions Visited 2017 Marketable Overnight Trips**

# Pennsylvania Regional Map

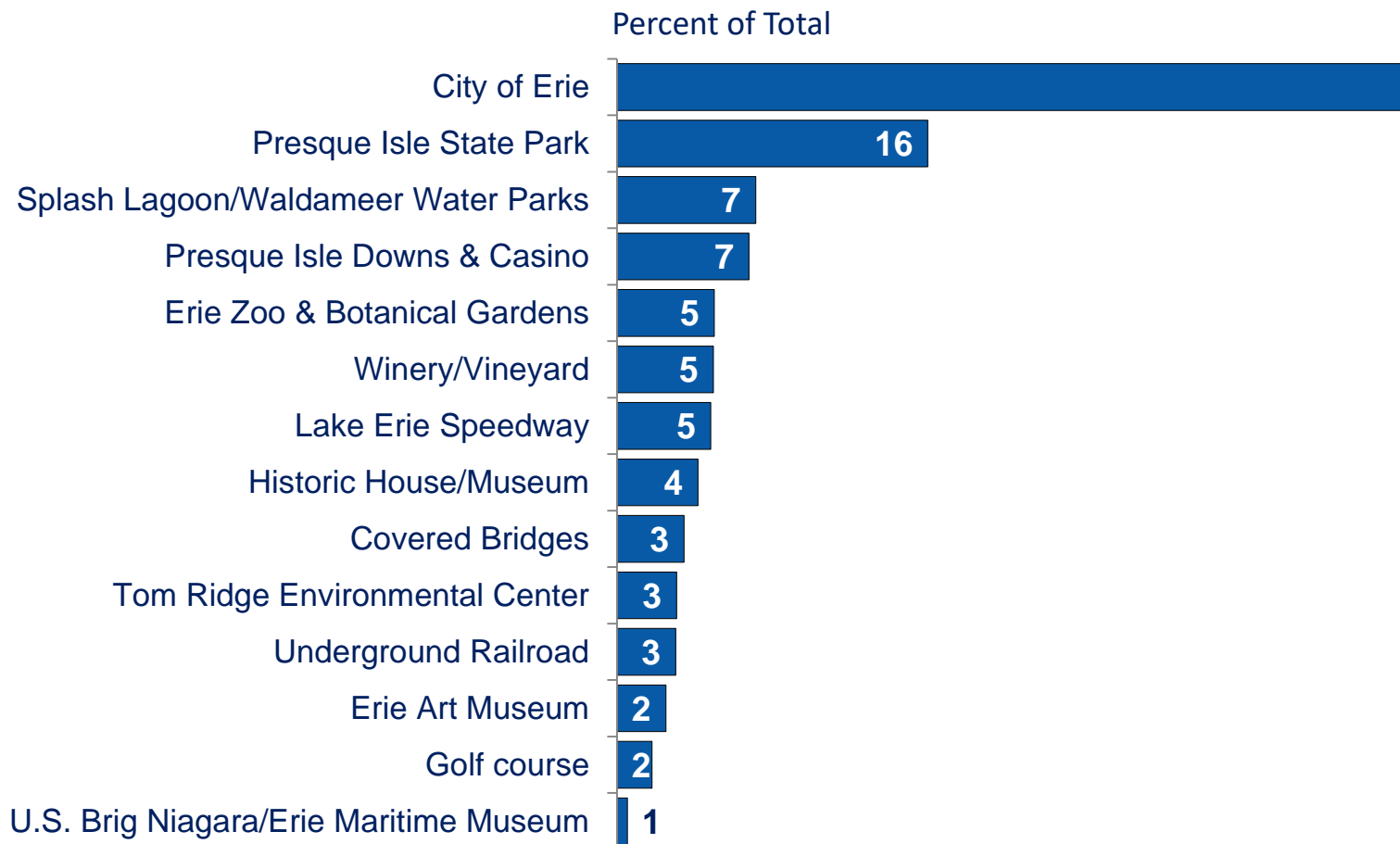


# Pennsylvania Attractions/Events

## Pennsylvania's Great Lakes Region, Erie Area



Base: Total Overnight Trips



# Pennsylvania Attractions/Events

## Pennsylvania's Great Lakes Region, All Other Areas



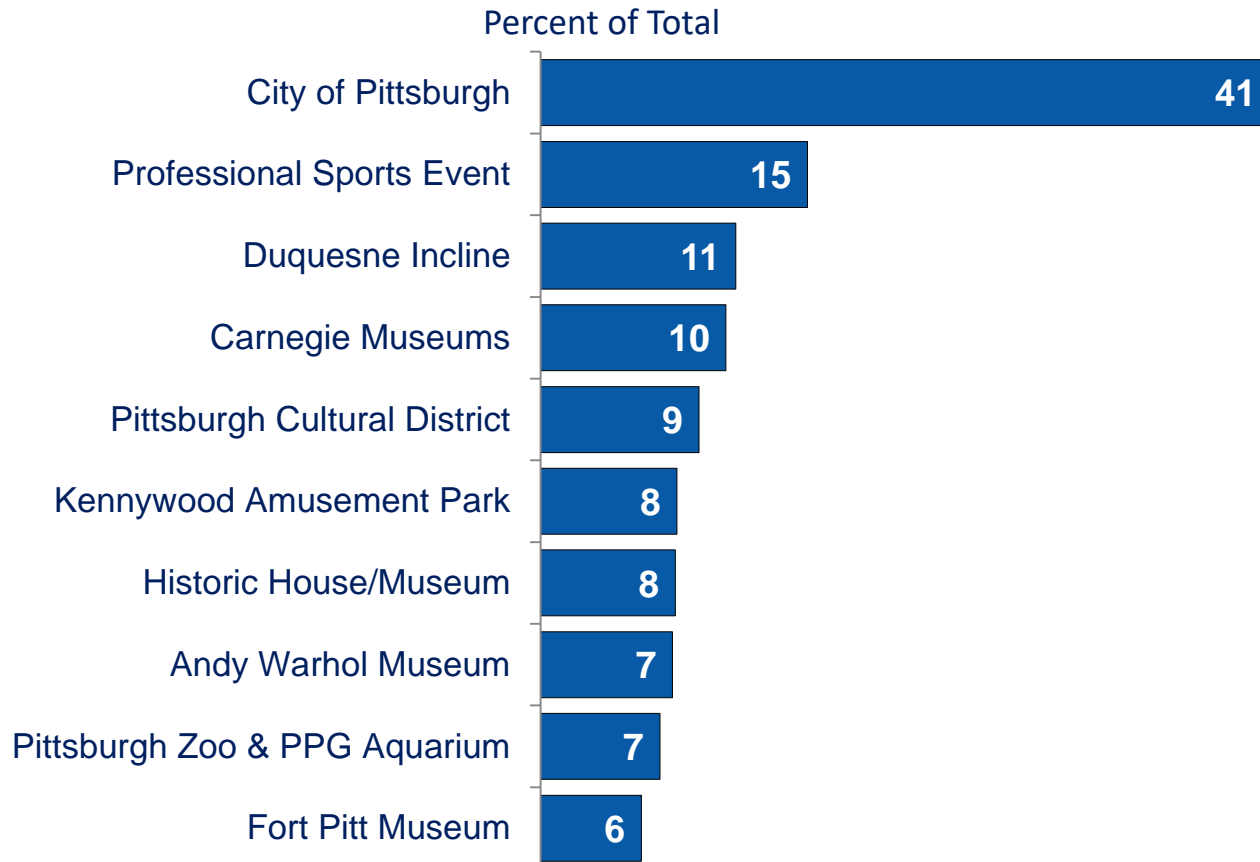
Base: Total Overnight Trips



# Pennsylvania Attractions/Events Pittsburgh and Its Countryside Region, Pittsburgh/Allegheny County



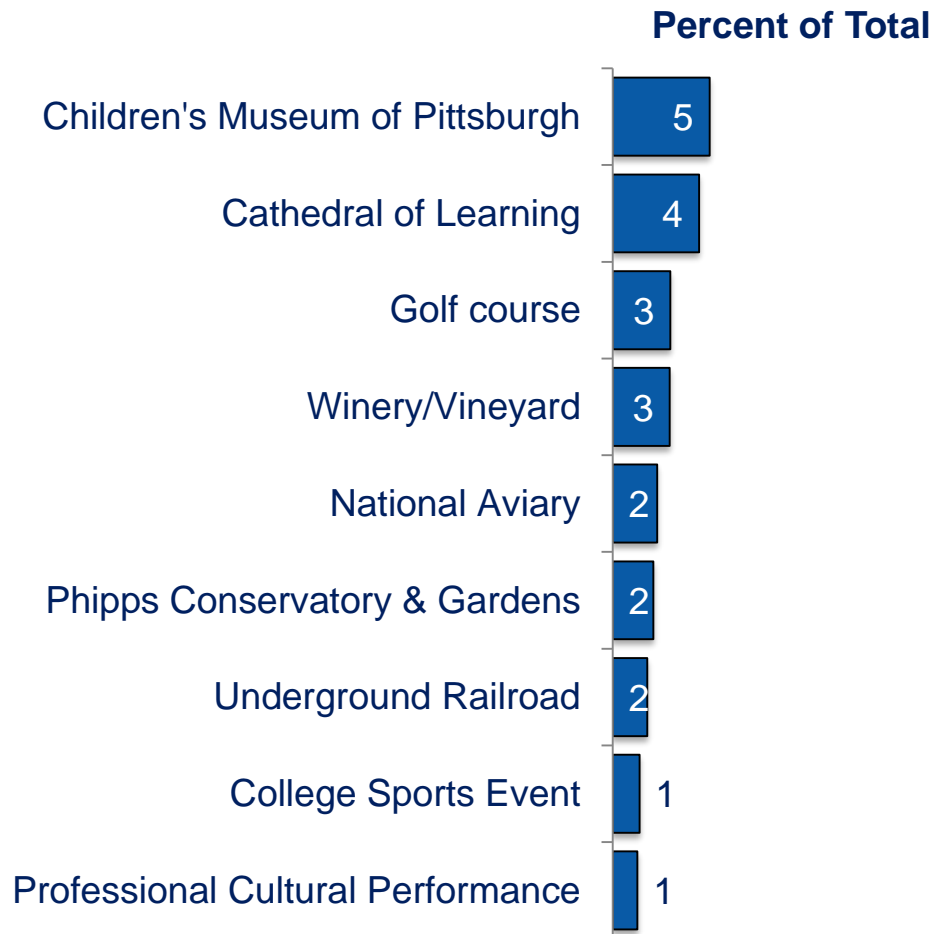
Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events Pittsburgh and Its Countryside Region, Pittsburgh/Allegheny County (cont'd)



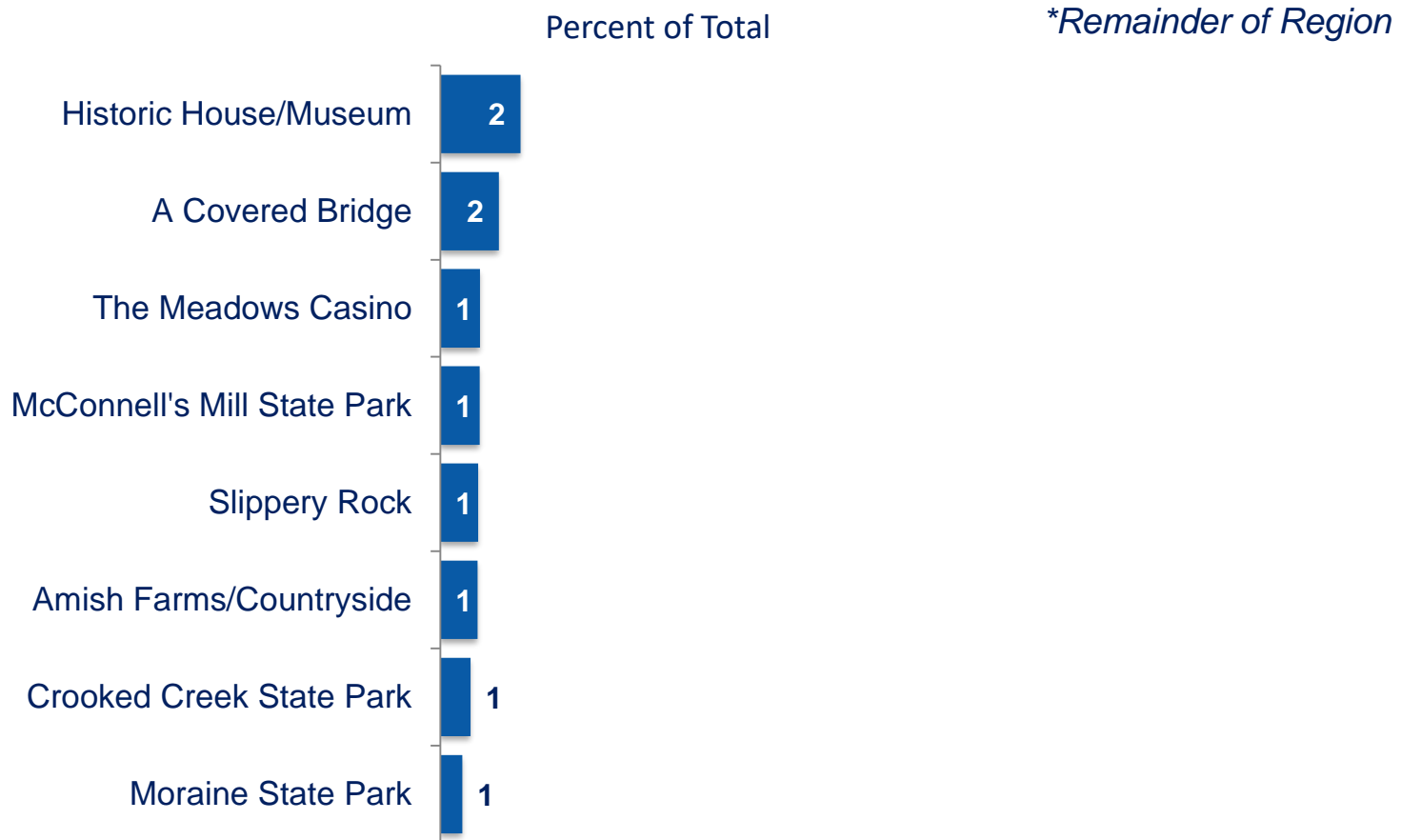
Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events Pittsburgh and Its Countryside Region, All Other Areas



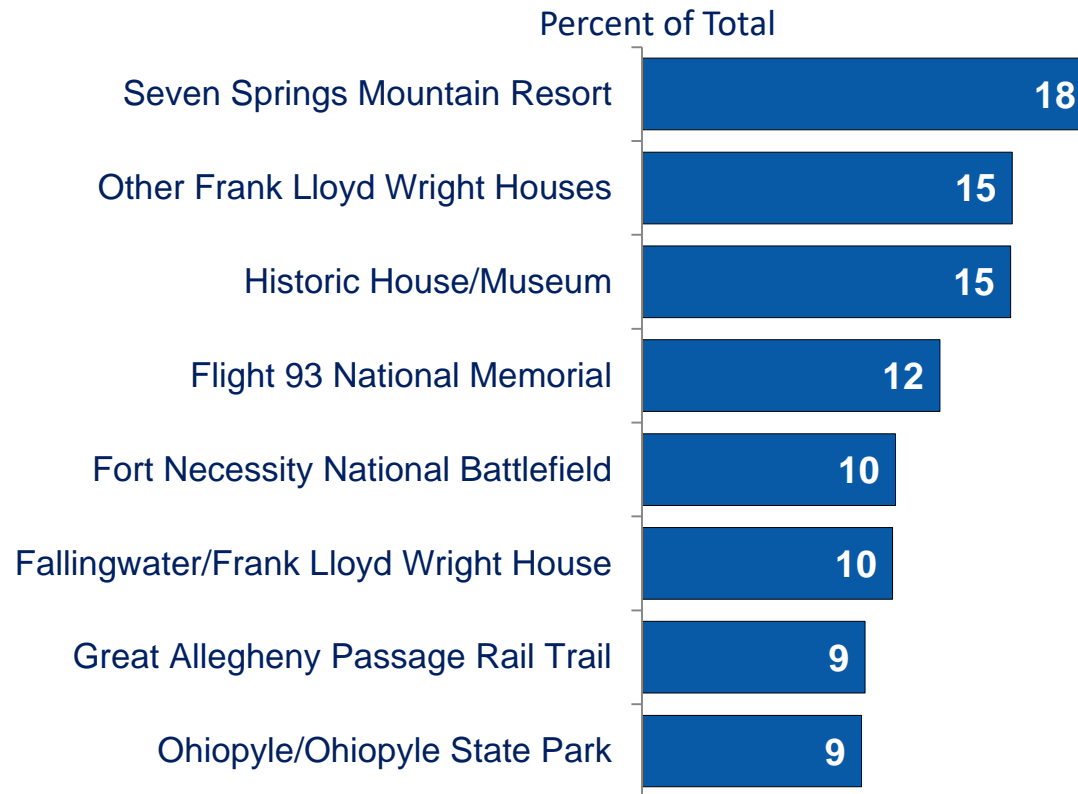
Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events Laurel Highlands Region



Base: Overnight Trips



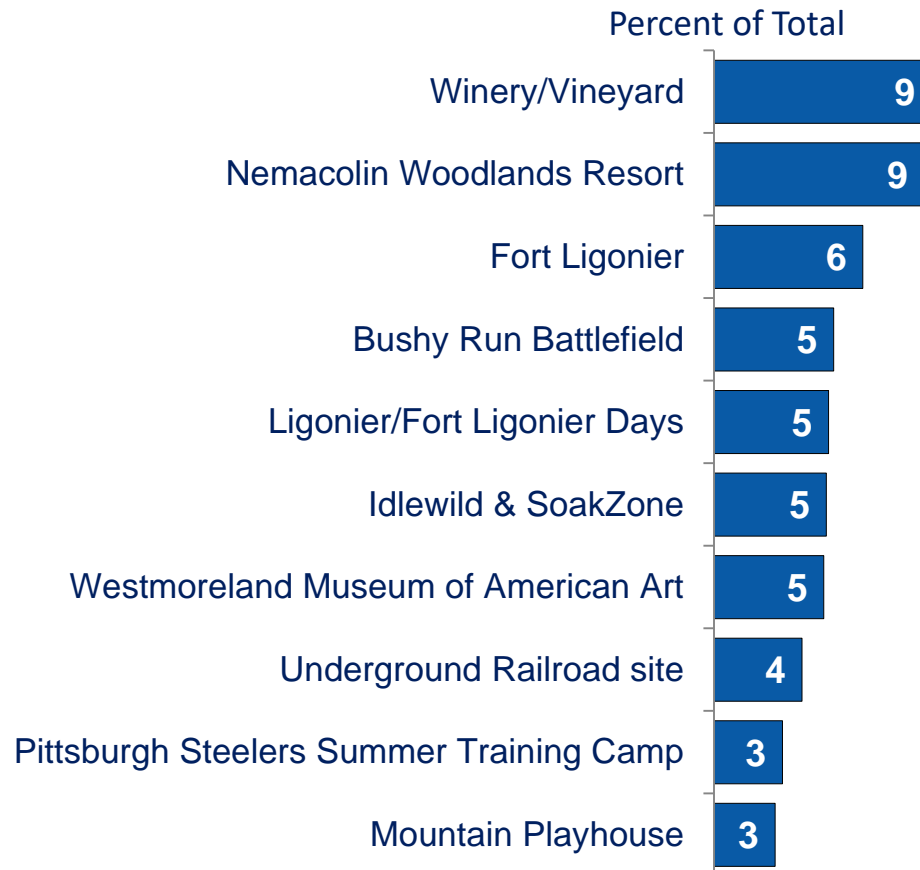
Note: Small Sample Size



# Pennsylvania Attractions/Events Laurel Highlands Region (cont'd)



Base: Total Overnight Trips



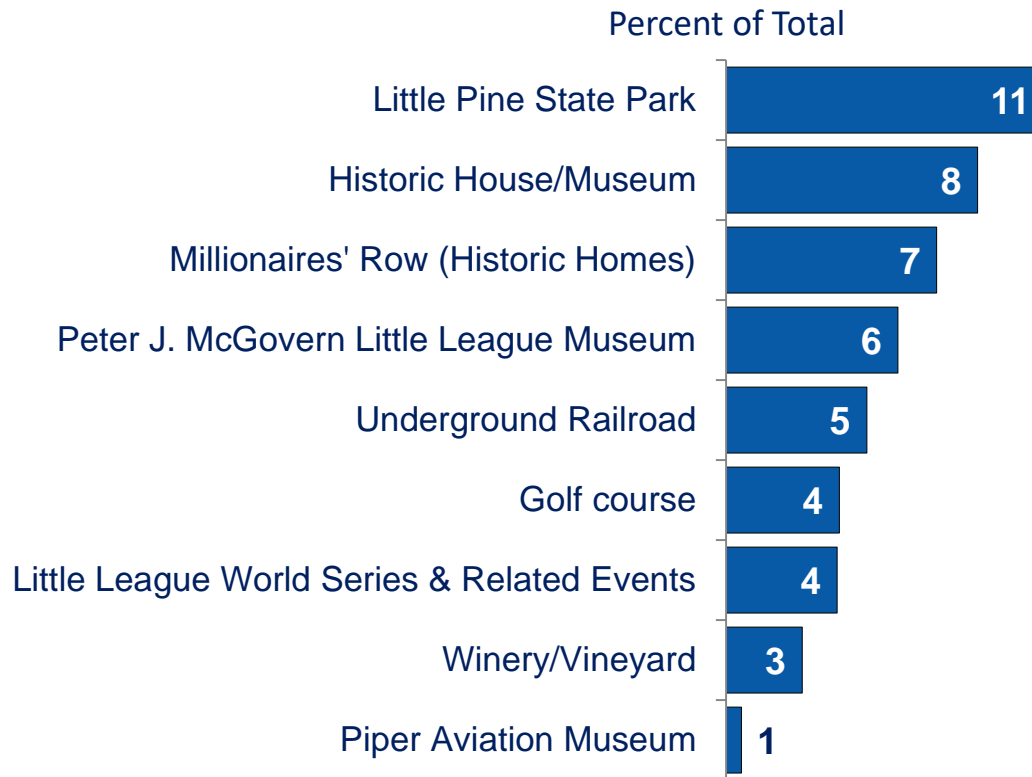
Note: Small Sample Size

# Pennsylvania Attractions/Events

## Pennsylvania Wilds Region, Williamsport/Lycoming County



Base: Total Overnight Trips



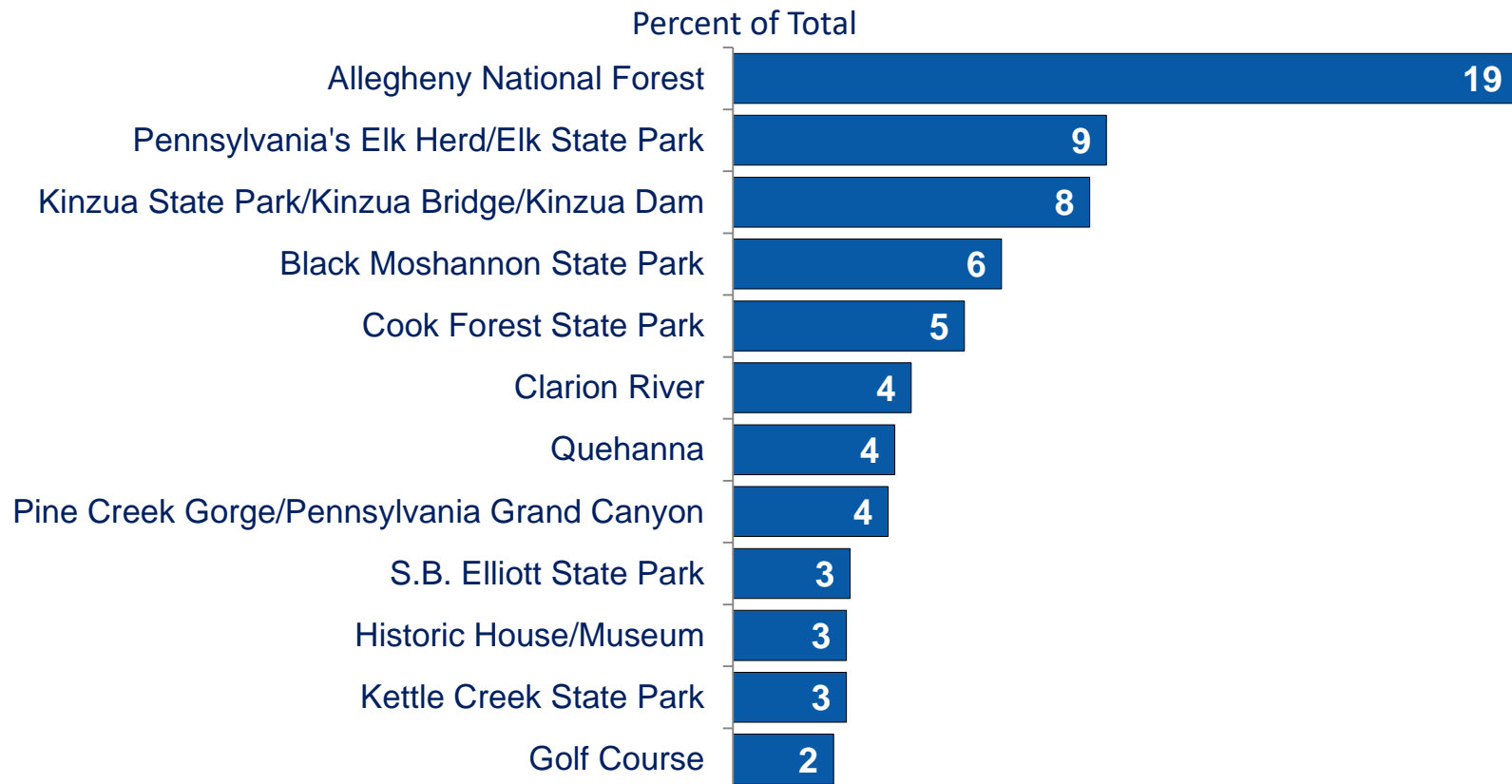
Note: Small Sample Size

# Pennsylvania Attractions/Events

## Pennsylvania Wilds Region, All Other Areas



Base: Total Overnight Trips



Note: Small Sample Size

# Pennsylvania Attractions/Events

## Pennsylvania Wilds Region, All Other Areas



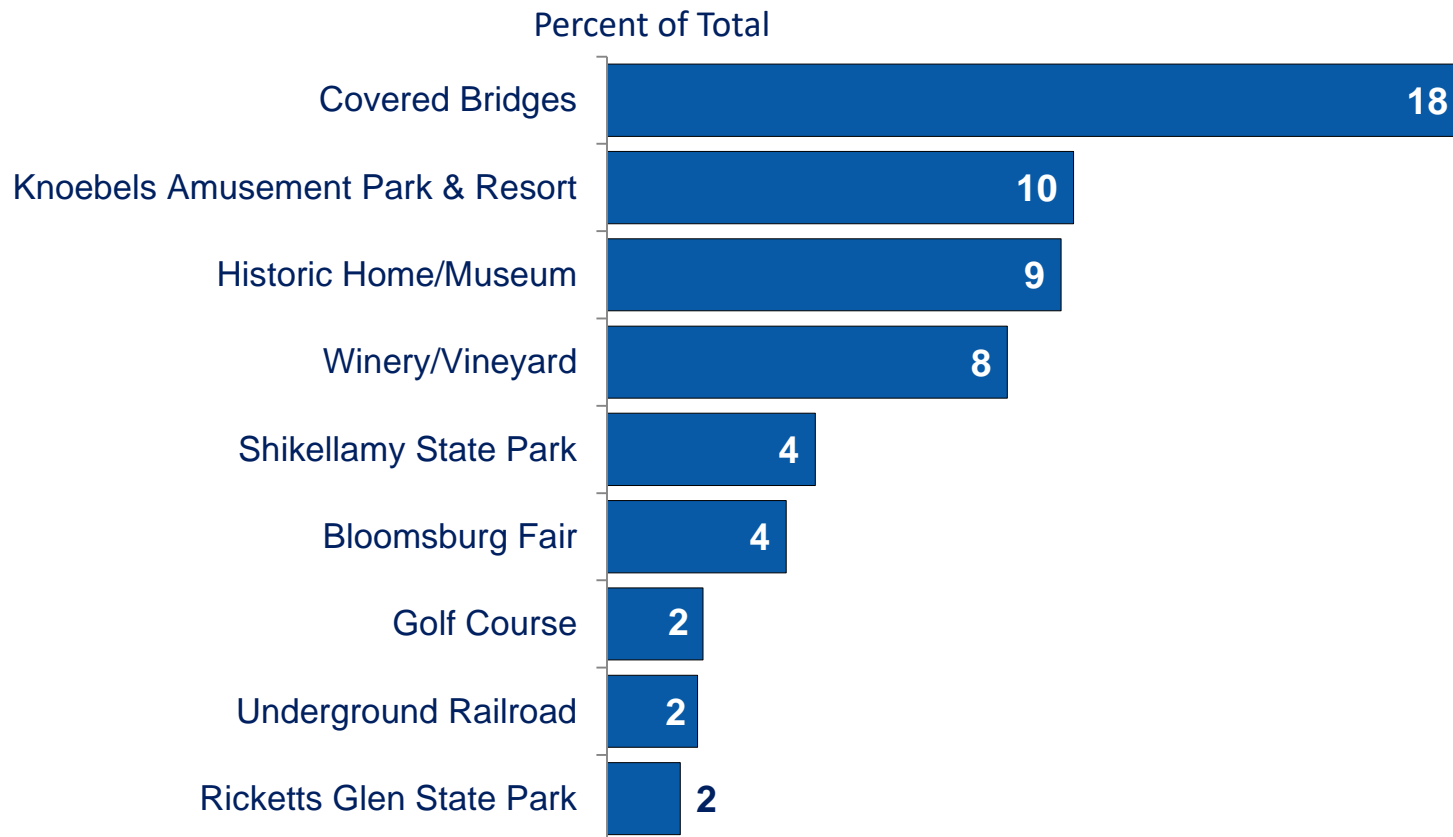
Base: Total Overnight Trips



# Pennsylvania Attractions/Events Valleys of the Susquehanna Region



Base: Total Overnight Trips



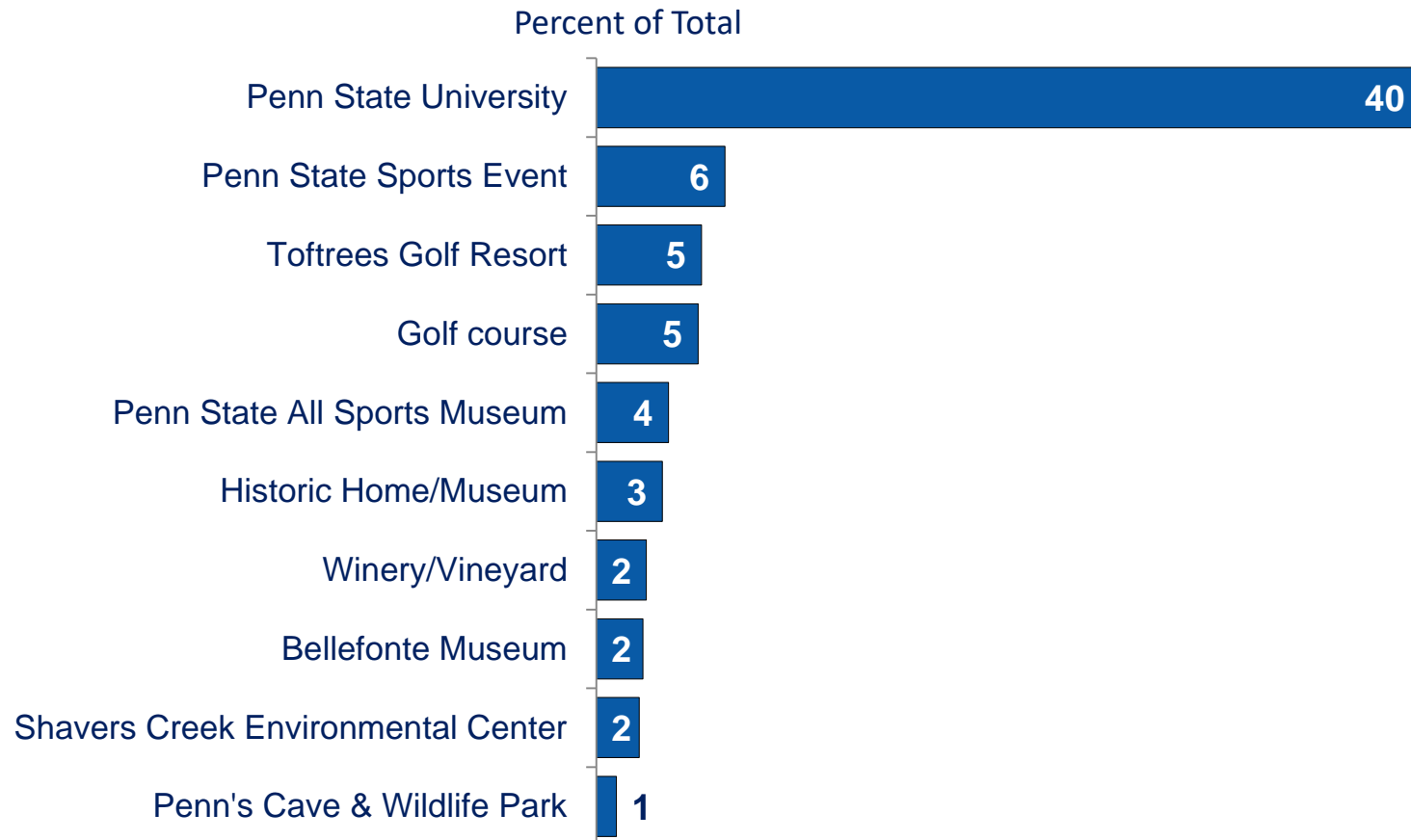
Note: Small Sample Size

# Pennsylvania Attractions/Events

## The Alleghenies Region, State College Area



Base: Total Overnight Trips

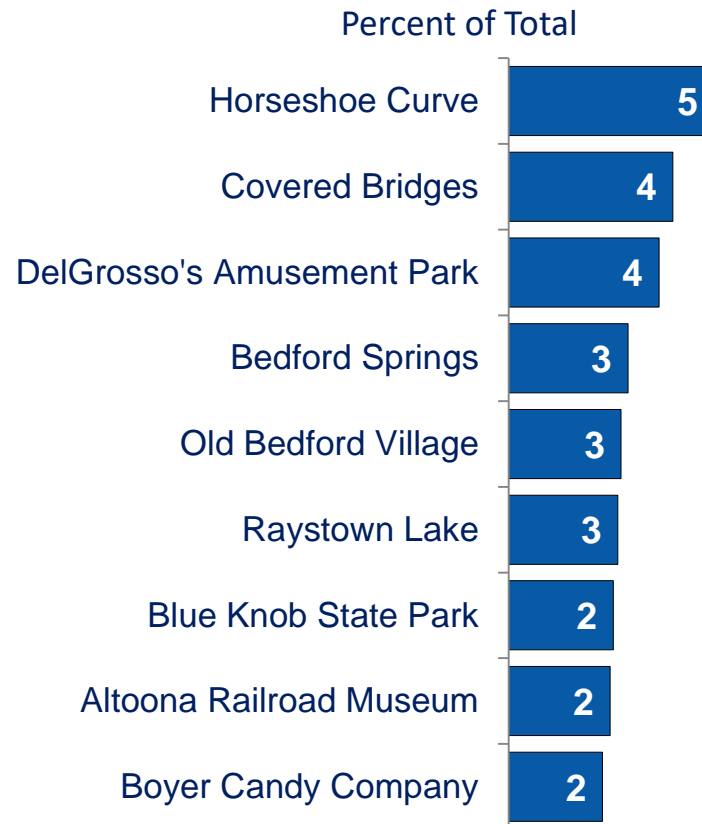


# Pennsylvania Attractions/Events

## The Alleghenies Region, All Other Areas



Base: Total Overnight Trips



# Pennsylvania Attractions/Events

## The Alleghenies Region, All Other Areas (cont'd)



Base: Total Overnight Trips

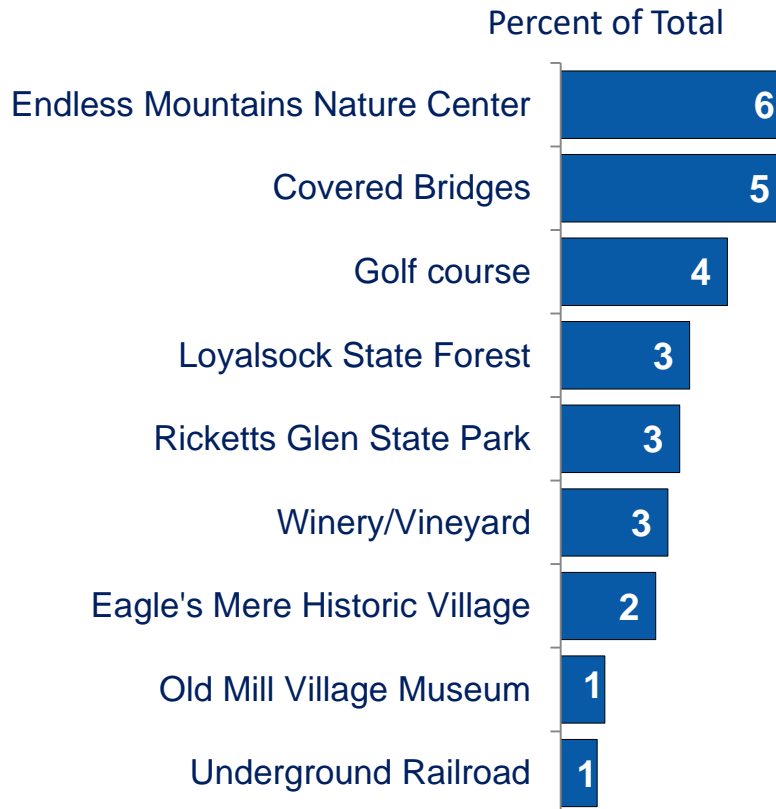




# Pennsylvania Attractions/Events — Upstate PA Region, Endless Mountains



Base: Total Overnight Trips

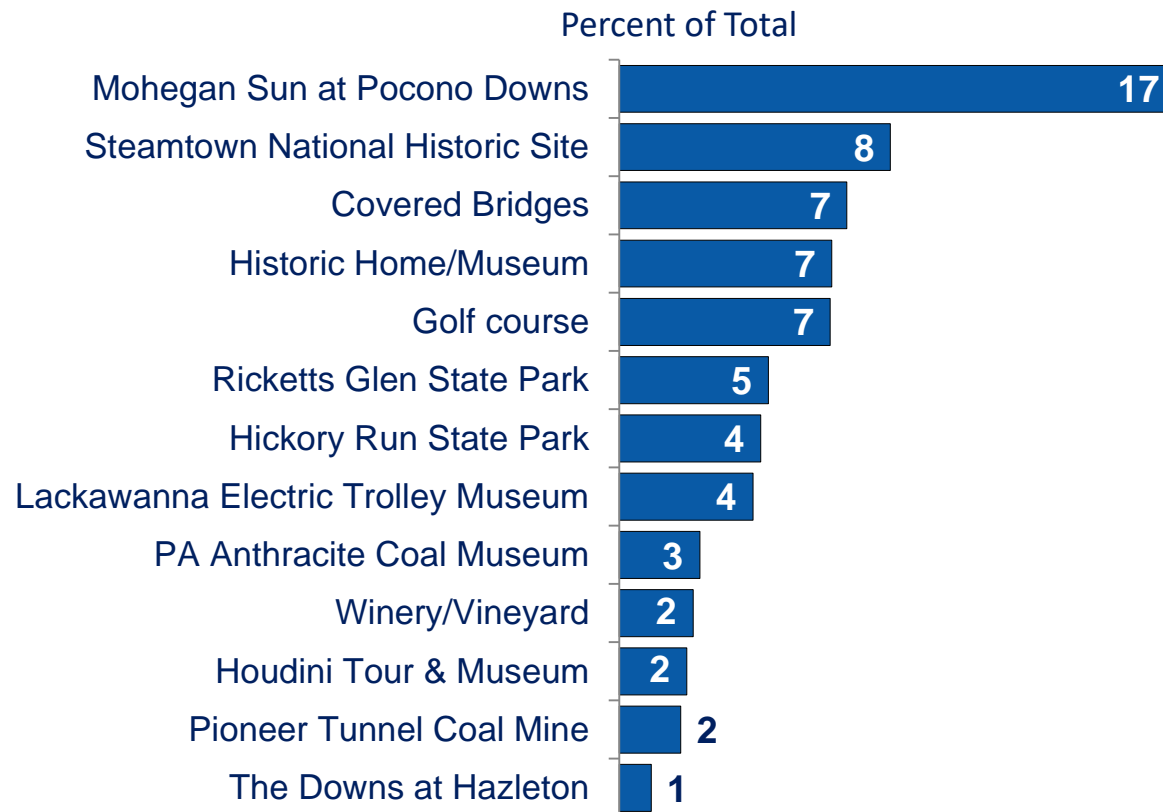


# Pennsylvania Attractions/Events

## Upstate PA Region, Wilkes-Barre/Scranton Area



Base: Total Overnight Trips



# Pennsylvania Attractions/Events

## Pocono Mountains Region



Base: Marketable Overnight Trips

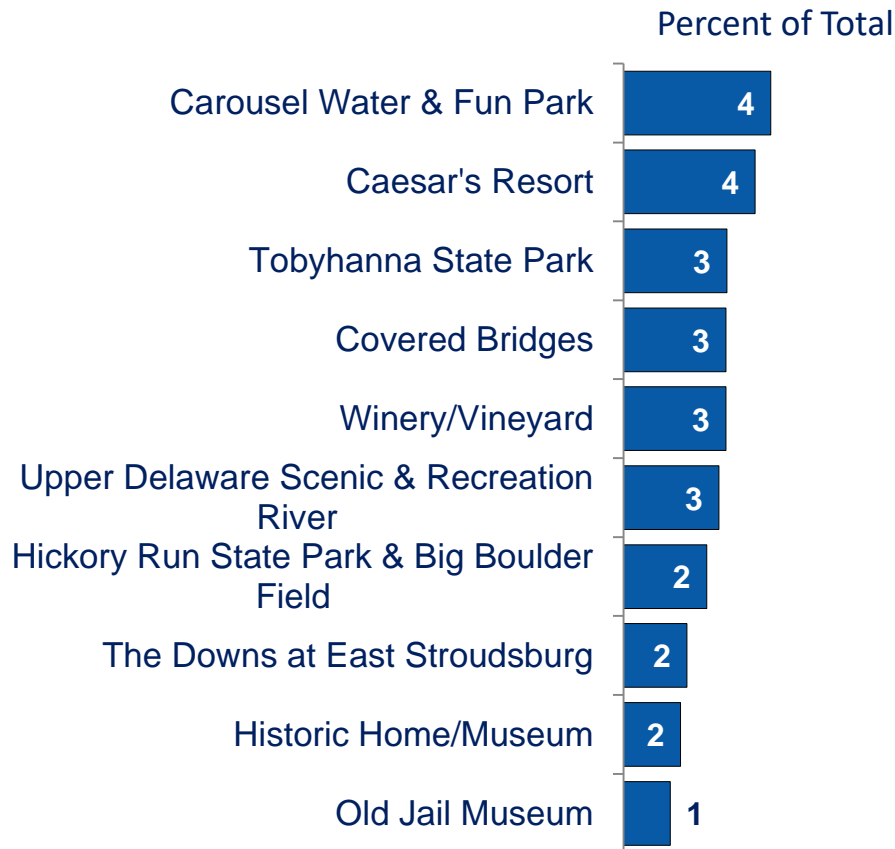
Percent of Total



# Pennsylvania Attractions/Events Pocono Mountains Region (cont'd)



Base: Marketable Overnight Trips

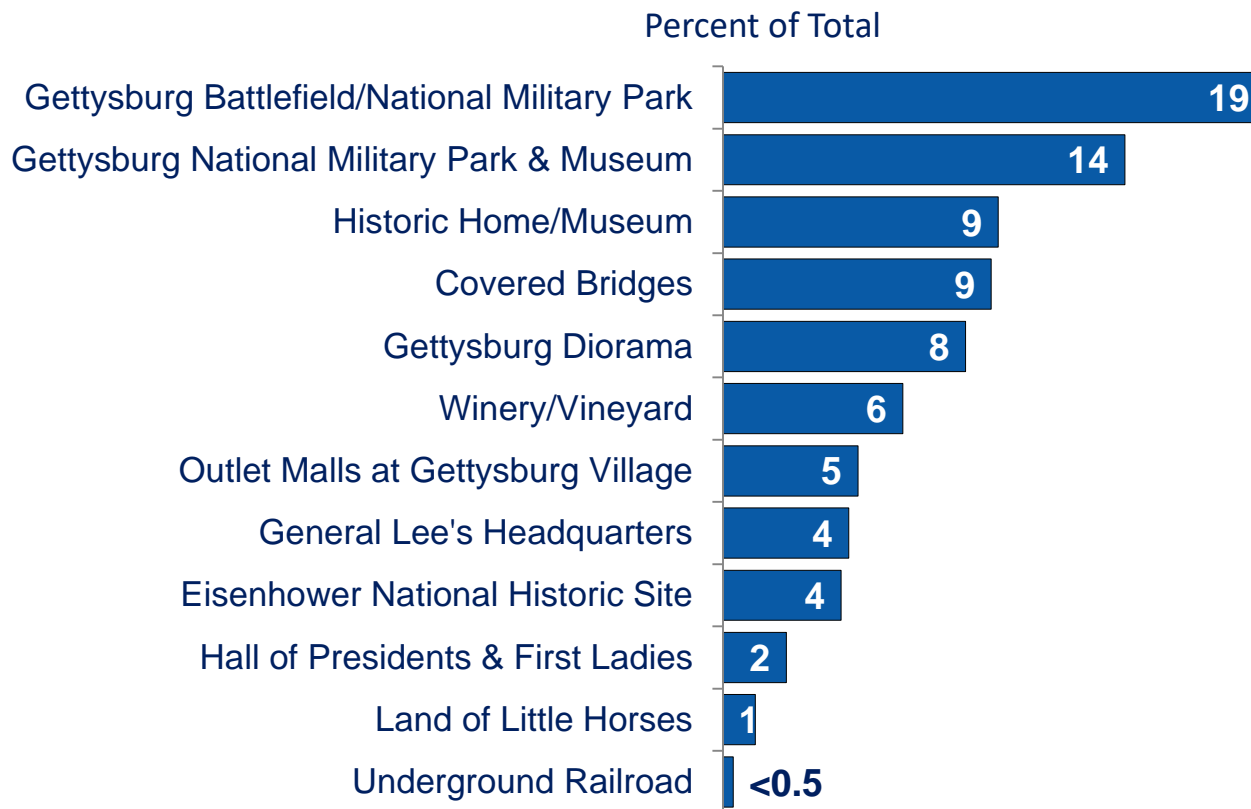


# Pennsylvania Attractions/Events

## Dutch Country Roads Region, Gettysburg Area



Base: Marketable Overnight Trips



*Gettysburg Battlefield/National Military Park and Gettysburg National Military Park & Museum had a combined net participation rate of 19%.*

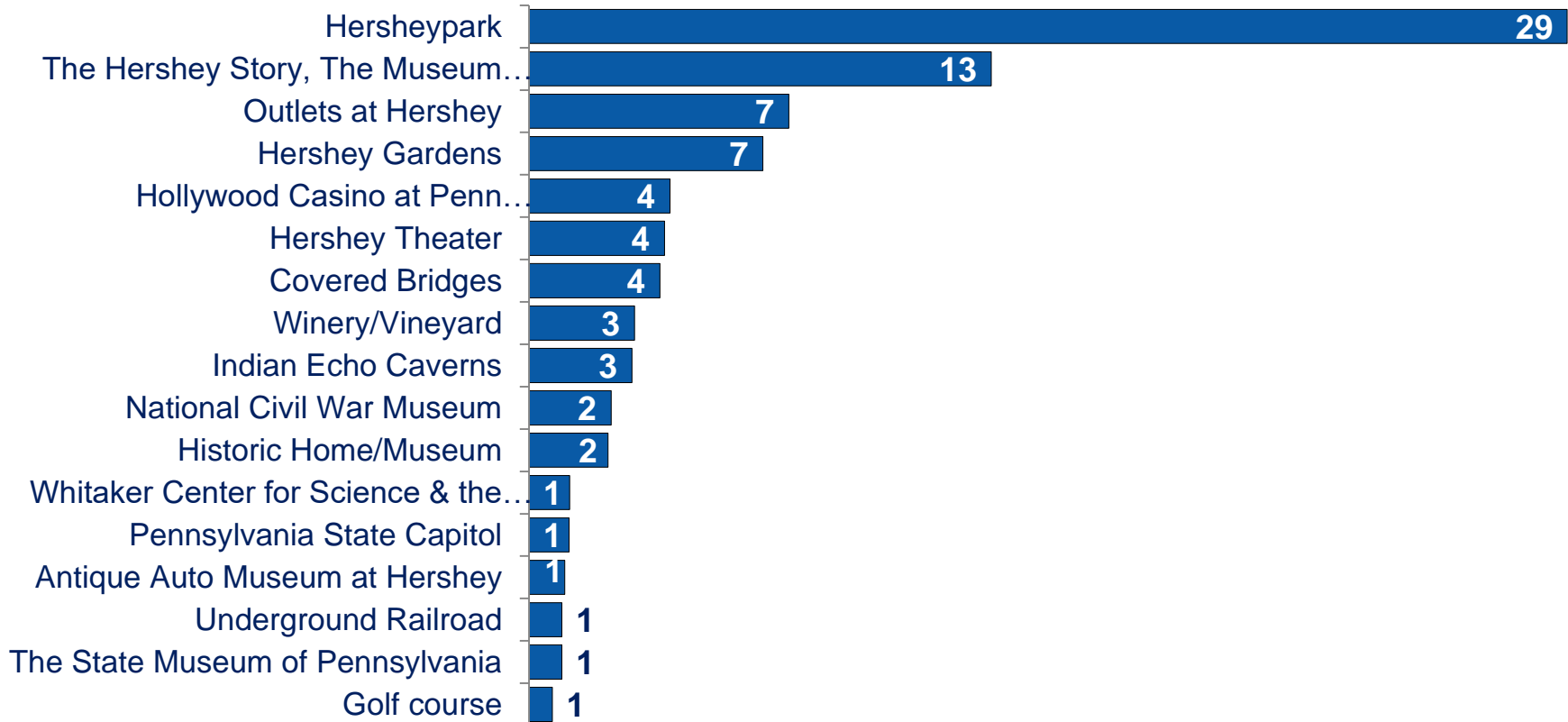
# Pennsylvania Attractions/Events

## Dutch Country Roads Region, Hershey/Harrisburg Area



Base: Marketable Overnight Trips

Percent of Total

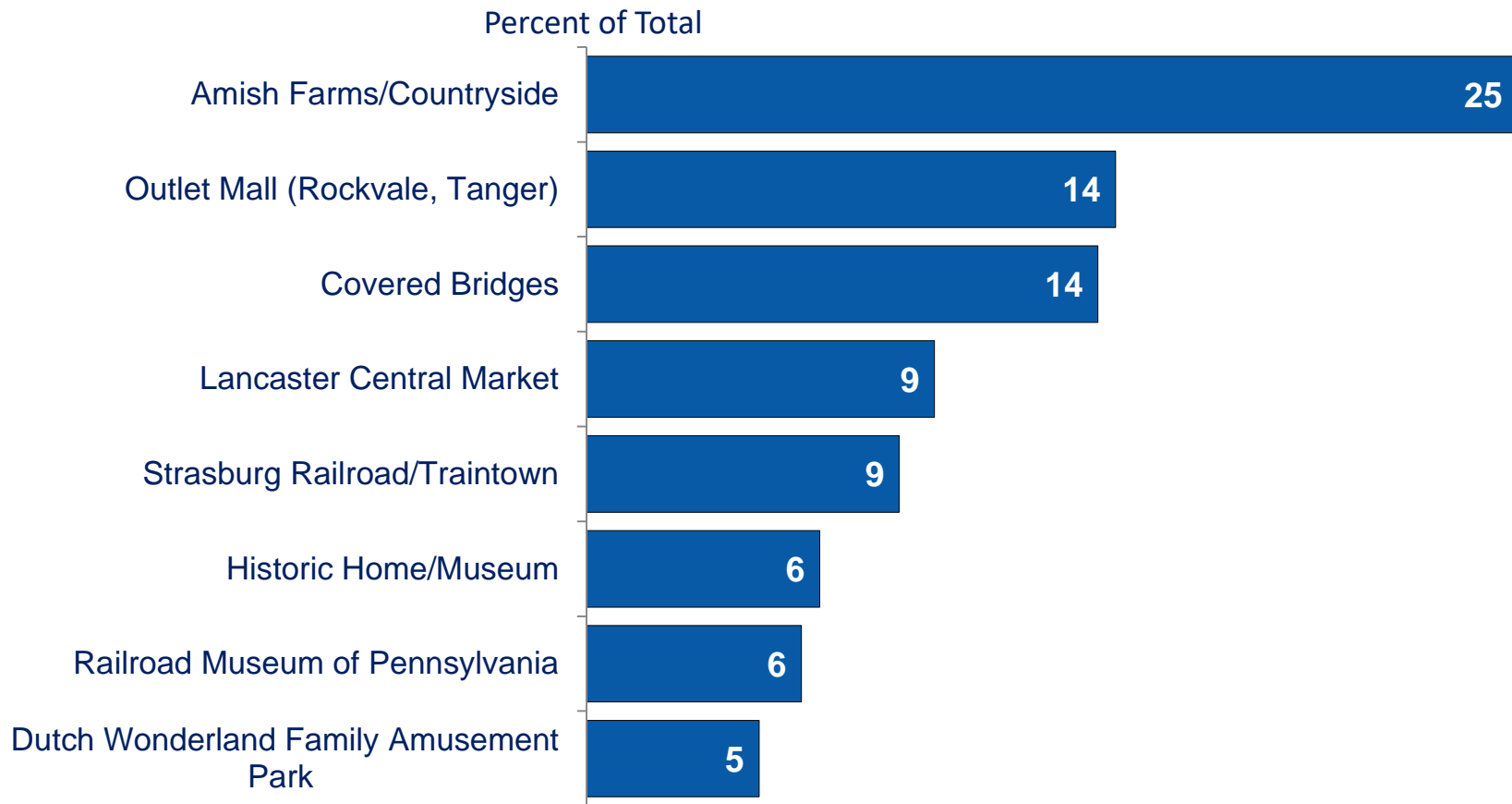


# Pennsylvania Attractions/Events

## Dutch Country Roads Region, Lancaster/Amish Farmland Area



Base: Marketable Overnight Trips

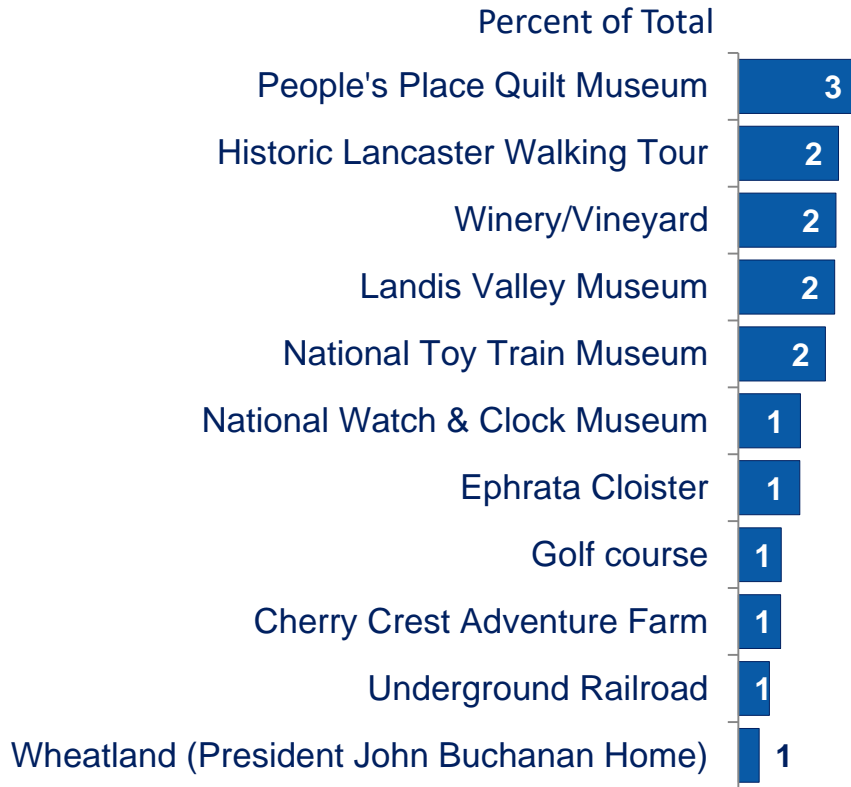


# Pennsylvania Attractions/Events

## Dutch Country Roads Region, Lancaster/Amish Farmland Area (cont'd)



Base: Marketable Overnight Trips





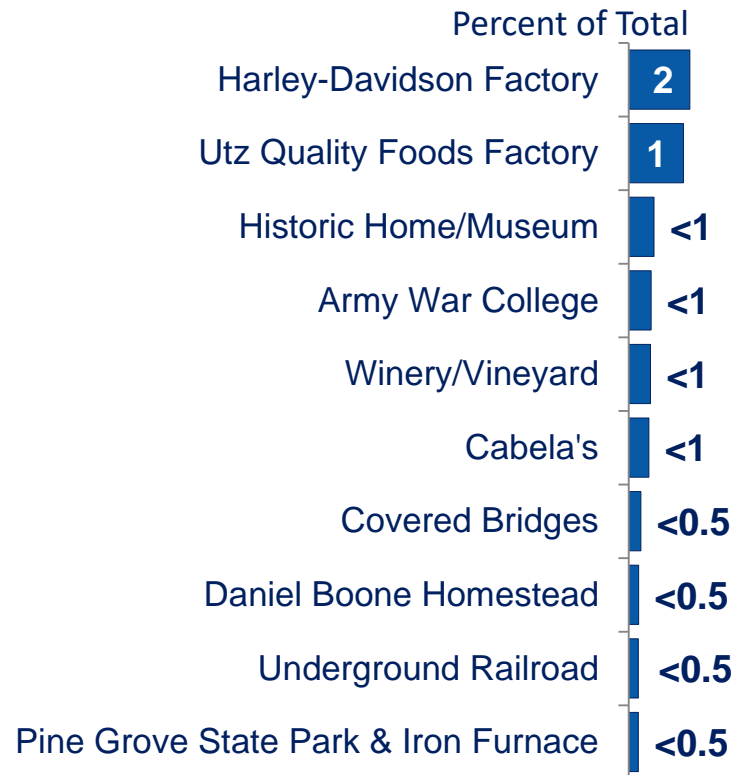
# Pennsylvania Attractions/Events

## Dutch Country Roads Region, All Other Areas



Base: Marketable Overnight Trips

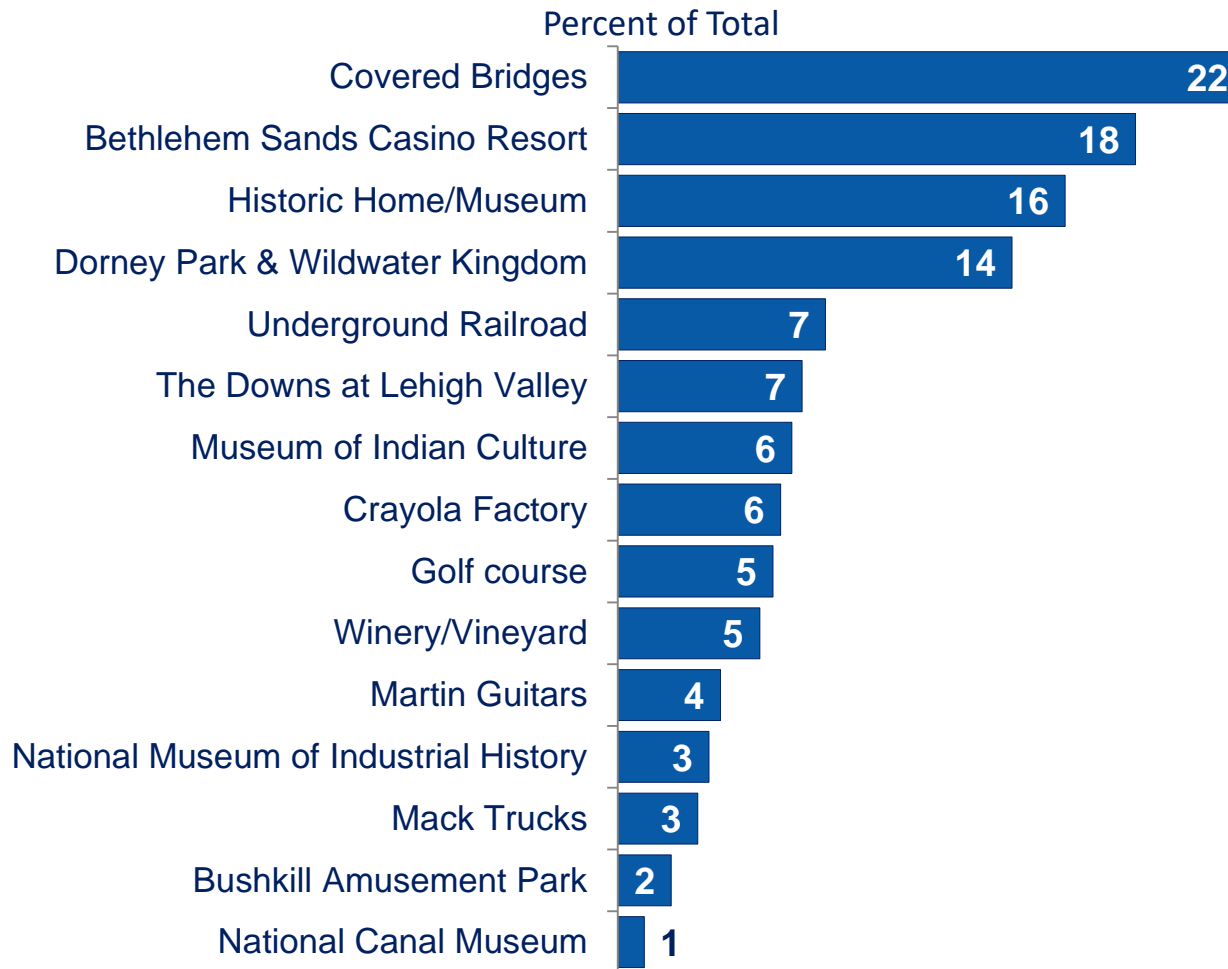
<1



# Pennsylvania Attractions/Events Lehigh Valley Region



Base: Total Overnight Trips



# Pennsylvania Attractions/Events

## Philadelphia & The Countryside Region, Philadelphia



Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events

## Philadelphia & The Countryside Region, Philadelphia (cont'd)



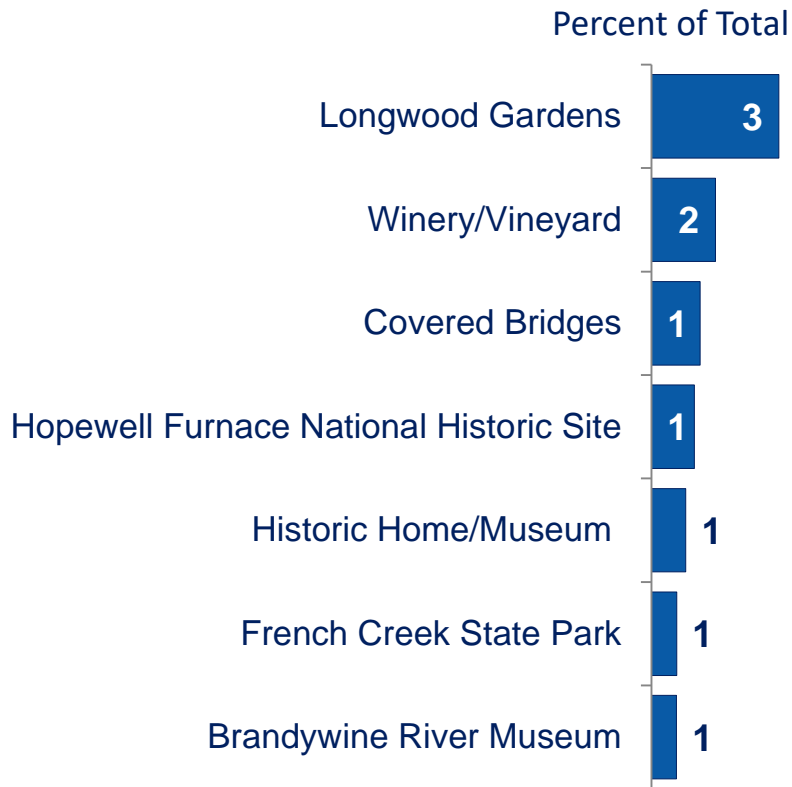
Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events Philadelphia & The Countryside Region, Brandywine Valley



Base: Marketable Overnight Trips



# Pennsylvania Attractions/Events

## Philadelphia & The Countryside Region, All Other Areas



Base: Marketable Overnight Trips



# **Factors Influencing Choice of Pennsylvania Tourism Region**

# Factors Influential In Choice of Pennsylvania's Great Lakes Region



Base: Total Overnight Trips

% Rating Factor As Very Important\*



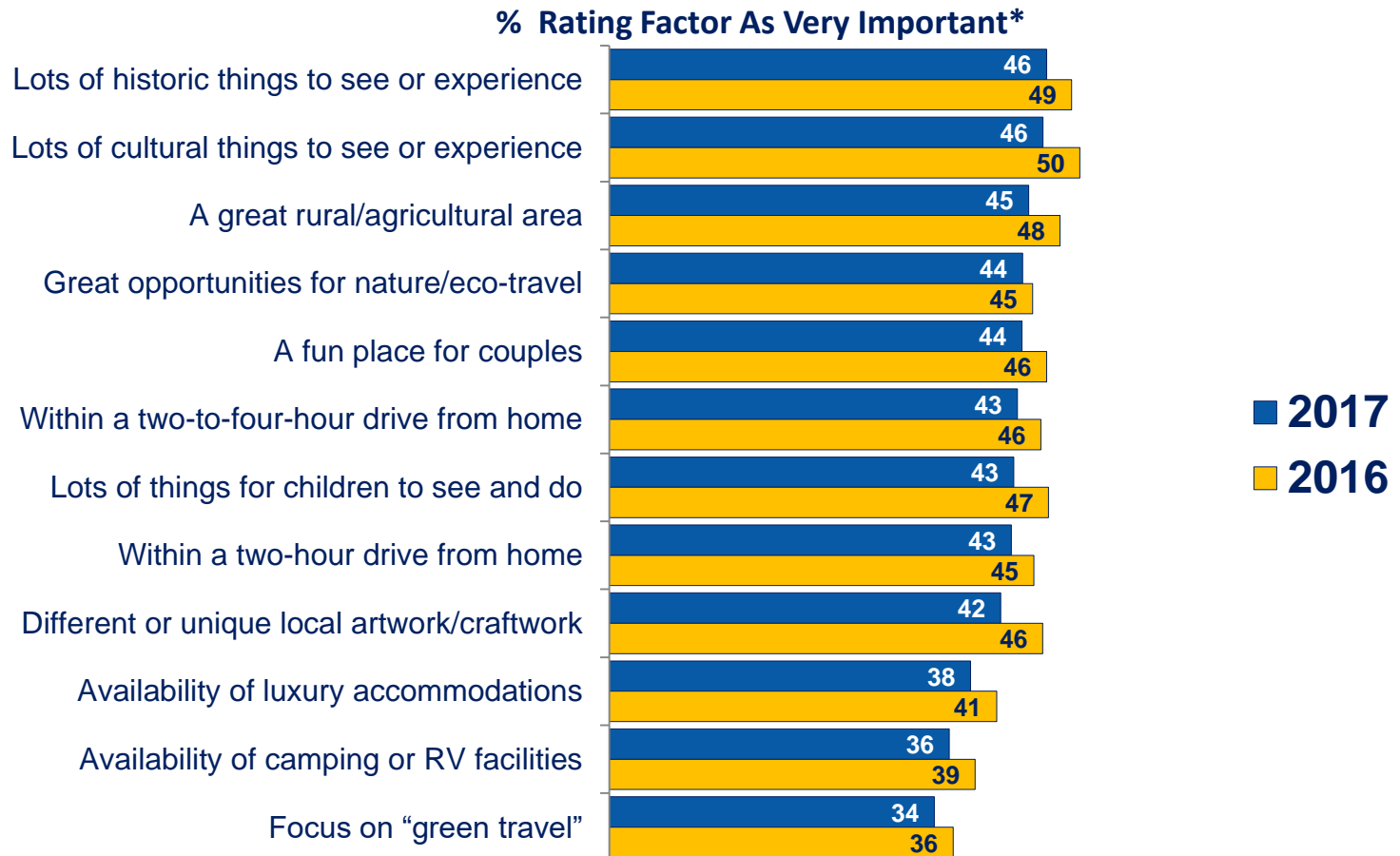
\* Rated 8, 9 or 10 on 10-pt. Importance scale



# Factors Influential In Choice of Pennsylvania's Great Lakes Region (cont'd)



Base: Total Overnight Trips

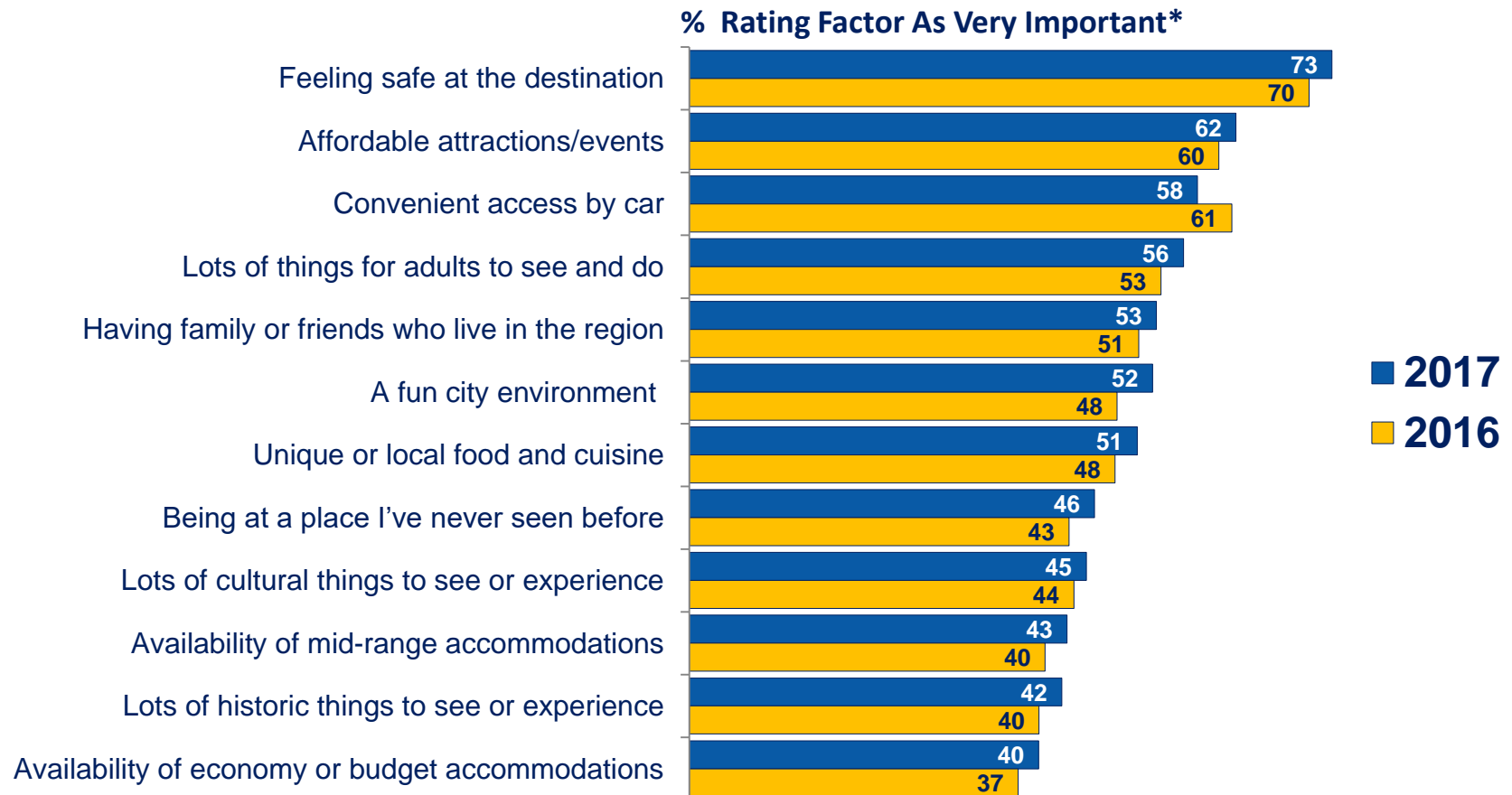


\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Pittsburgh & Its Countryside Region



Base: Total Overnight Trips



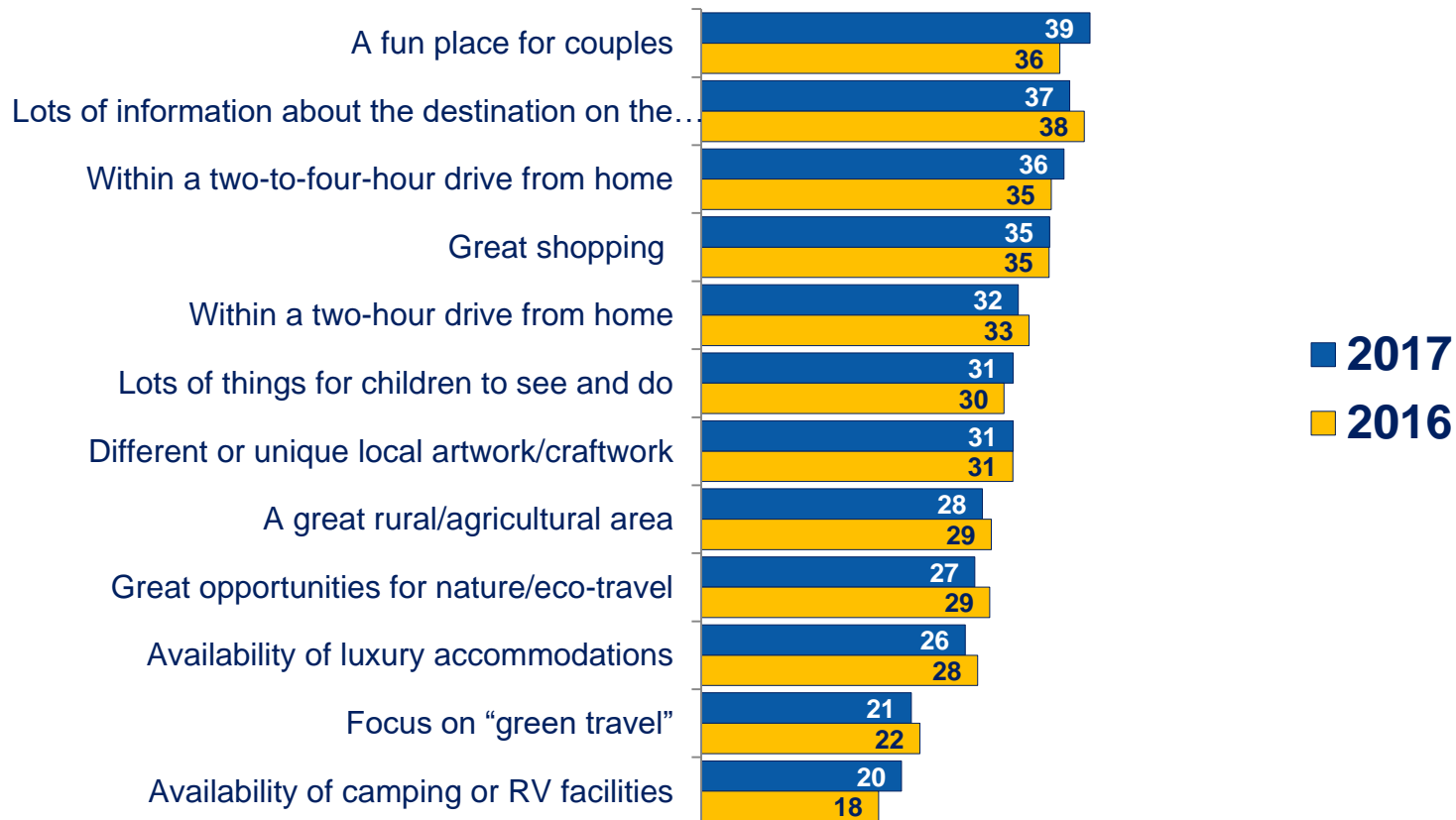
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Pittsburgh & Its Countryside Region (cont'd)



Base: Total Overnight Trips

% Rating Factor As Very Important\*

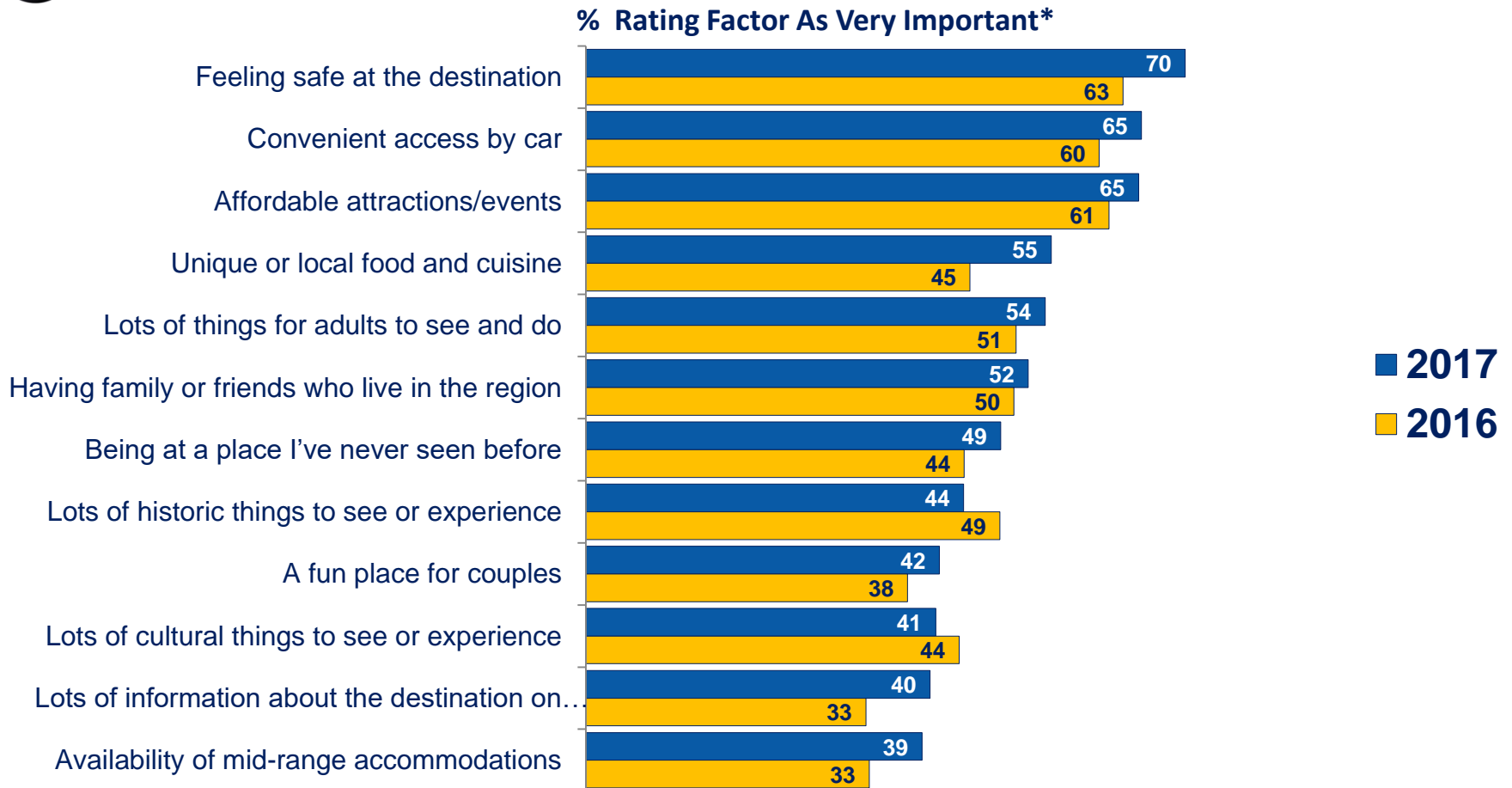


\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Laurel Highlands Region



Base: Total Overnight Trips

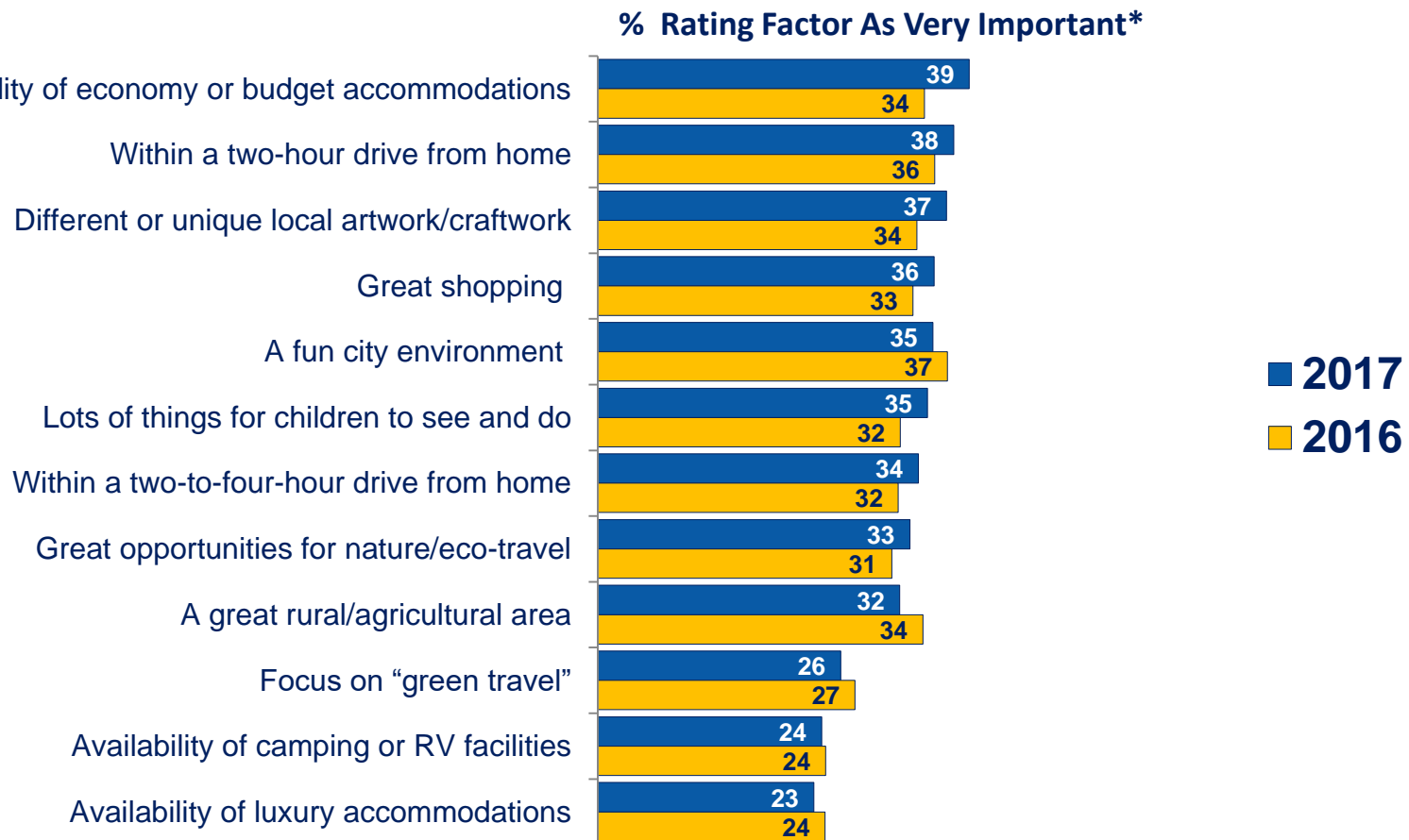


\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Laurel Highlands Region (cont'd)



Base: Total Overnight Trips

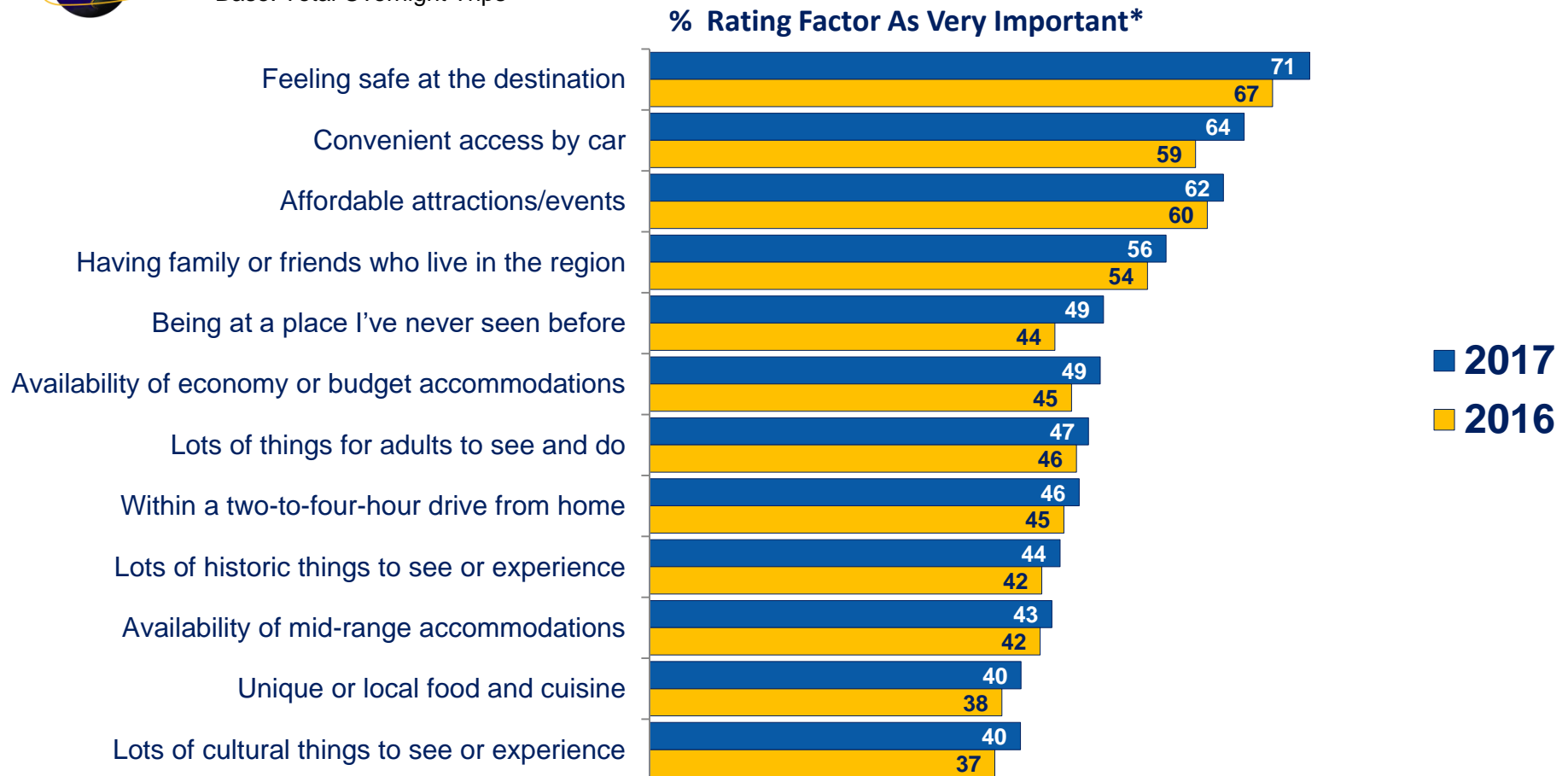


\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Pennsylvania Wilds Region



Base: Total Overnight Trips

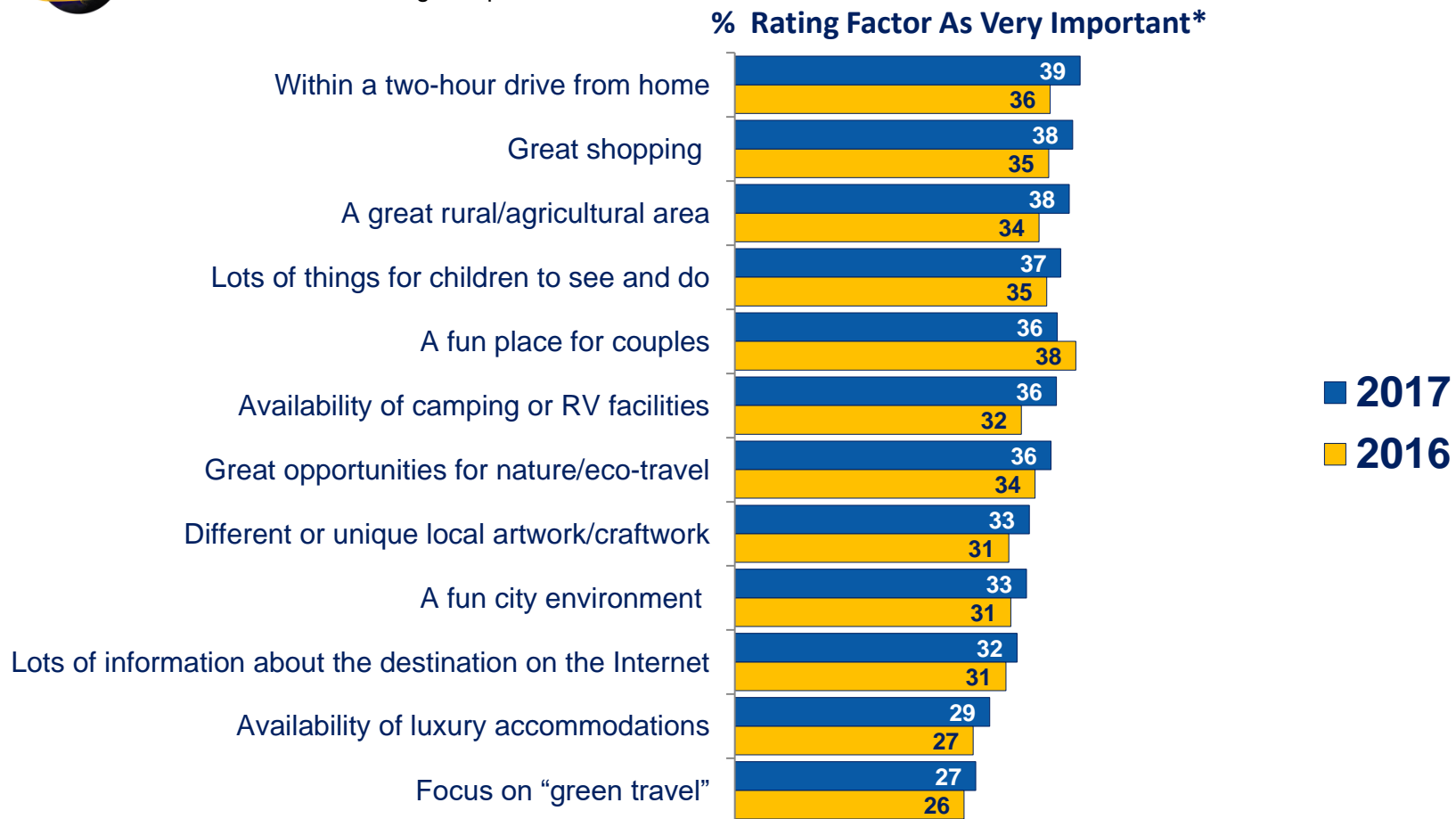


\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Pennsylvania Wilds Region (cont'd)



Base: Total Overnight Trips



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

# Factors Influential In Choice of Valleys of the Susquehanna Region



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



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

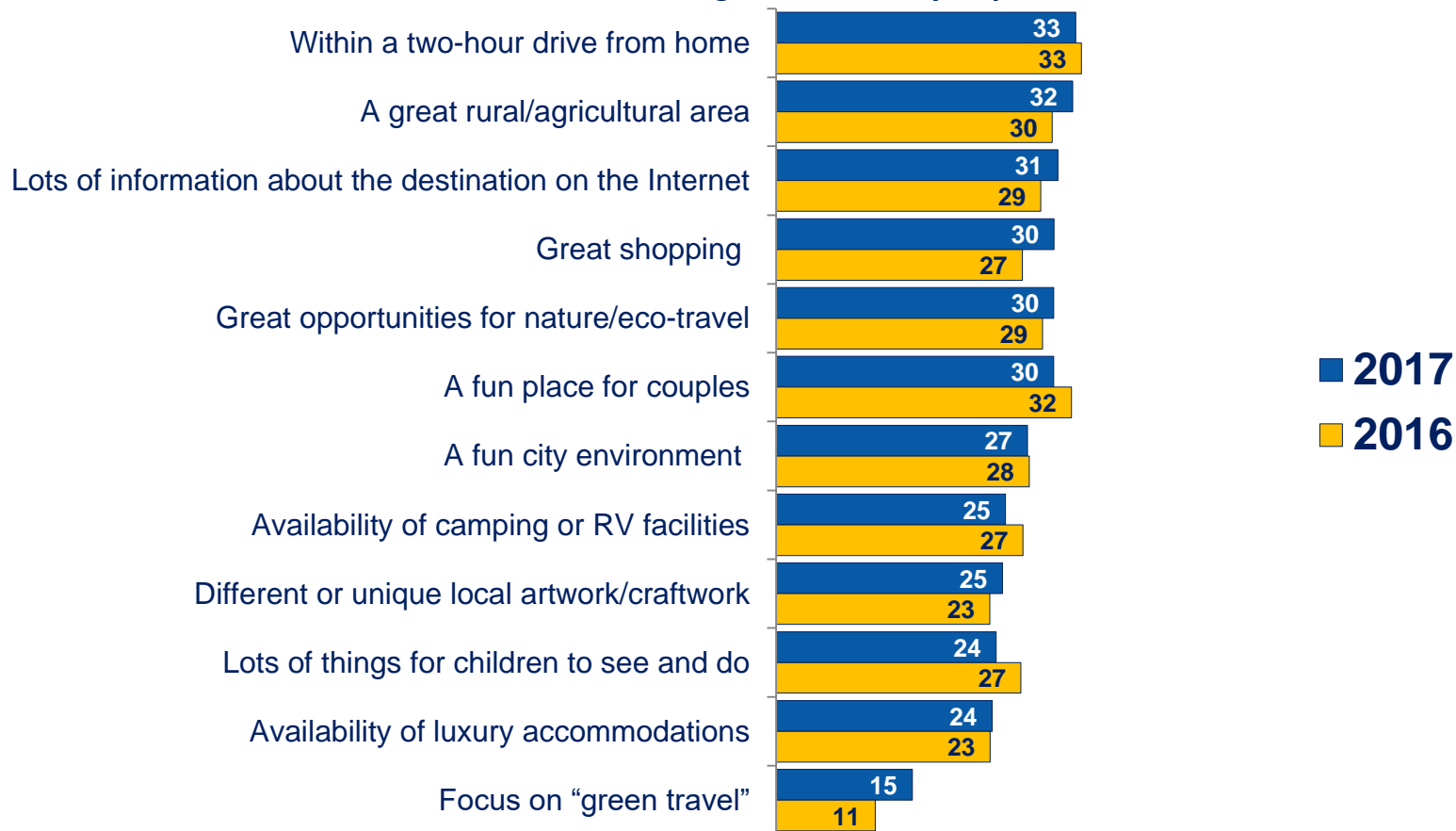


# Factors Influential In Choice of Valleys of the Susquehanna Region (cont'd)



Base: Total Overnight Trips

% Rating Factor As Very Important\*



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

# Factors Influential In Choice of The Alleghenies Region



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



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

# Factors Influential In Choice of The Alleghenies Region (cont'd)



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



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

# Factors Influential In Choice of Upstate PA Region



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



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

# Factors Influential In Choice of Upstate PA Region (cont'd)



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



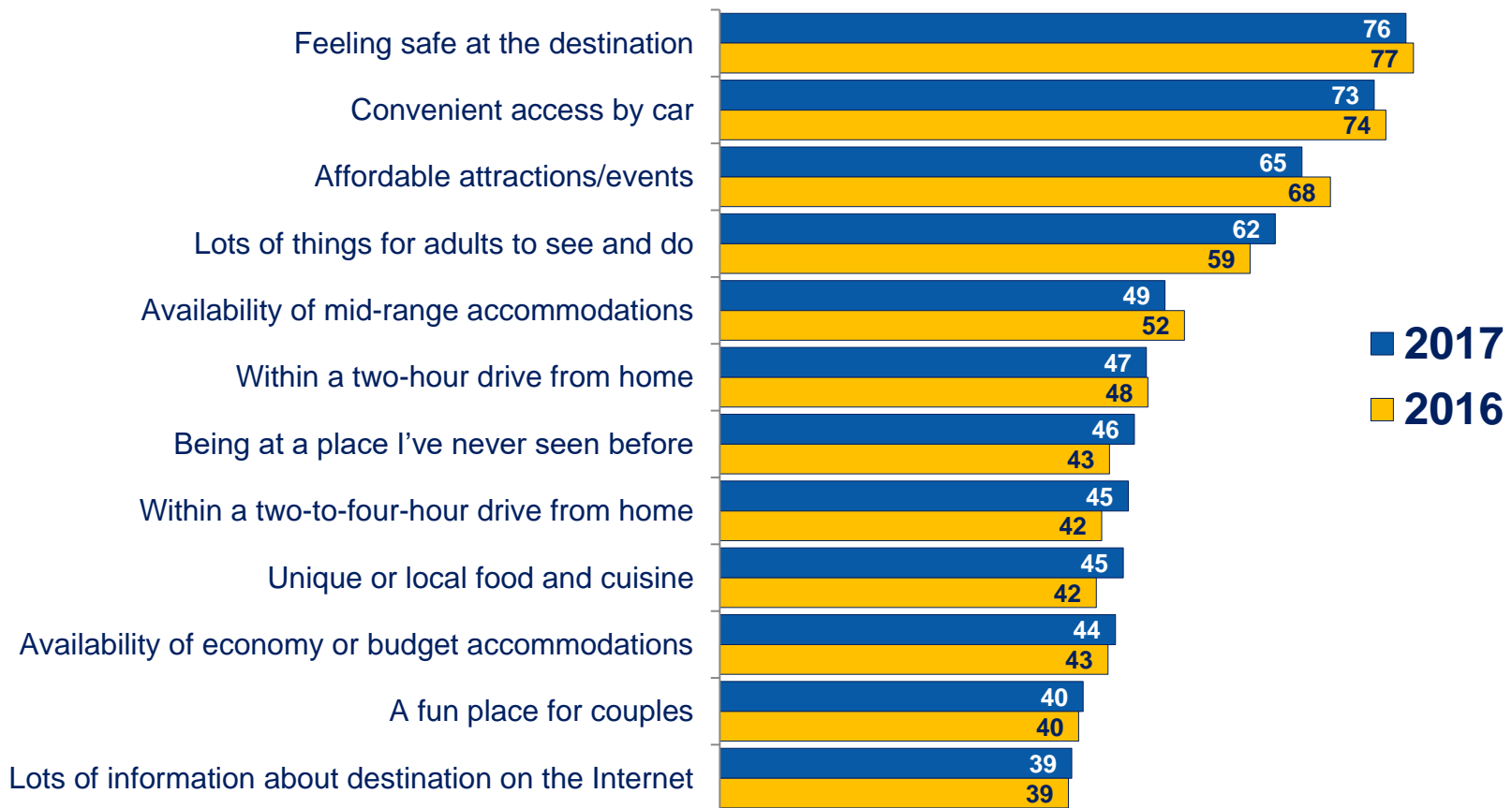
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Pocono Mountains Region



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



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

# Factors Influential In Choice of Pocono Mountains Region (cont'd)



Base: Total Overnight Trips



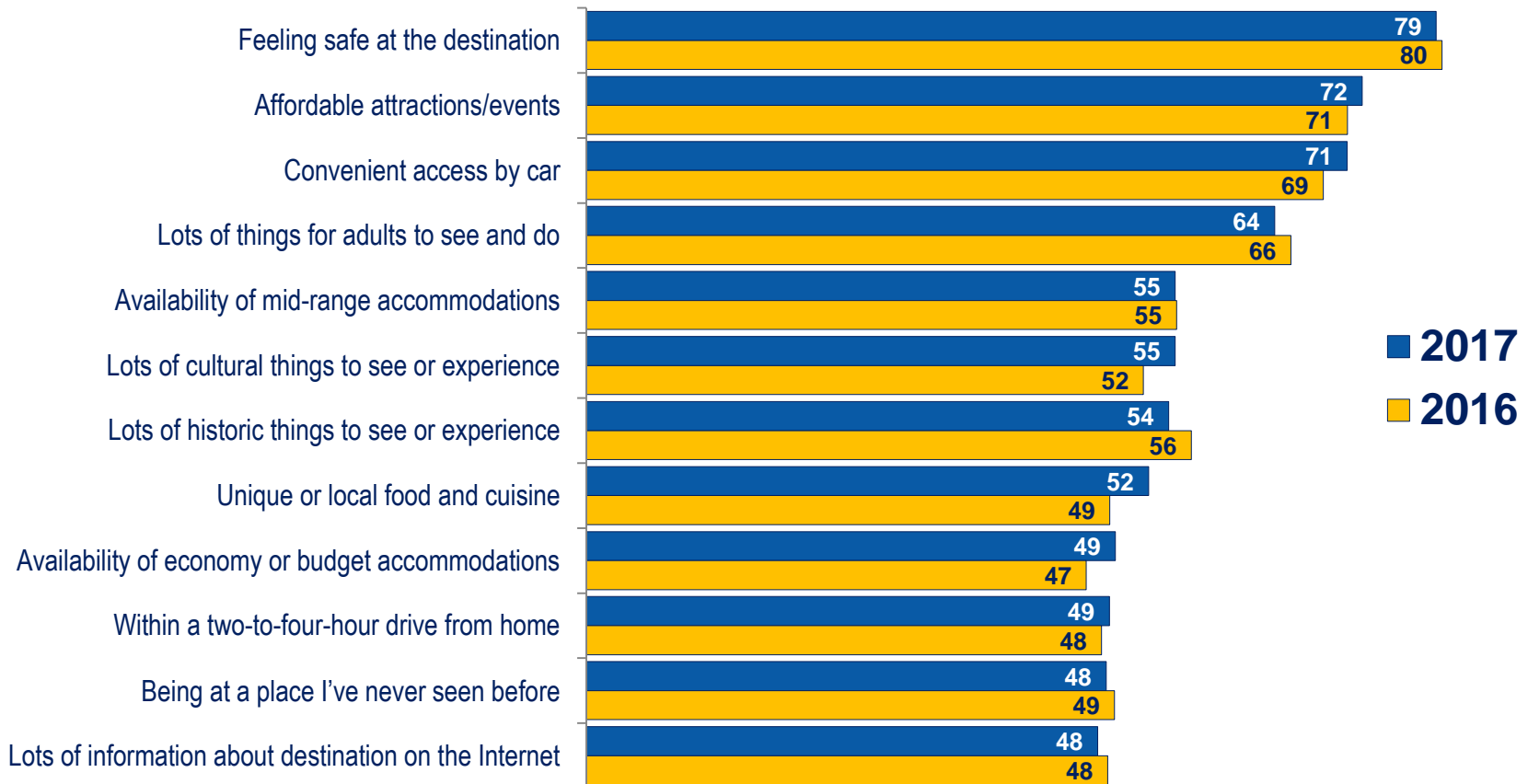
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Dutch Country Roads Region



Base: Marketable Overnight Trips

## % Rating Factor As Very Important\*



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

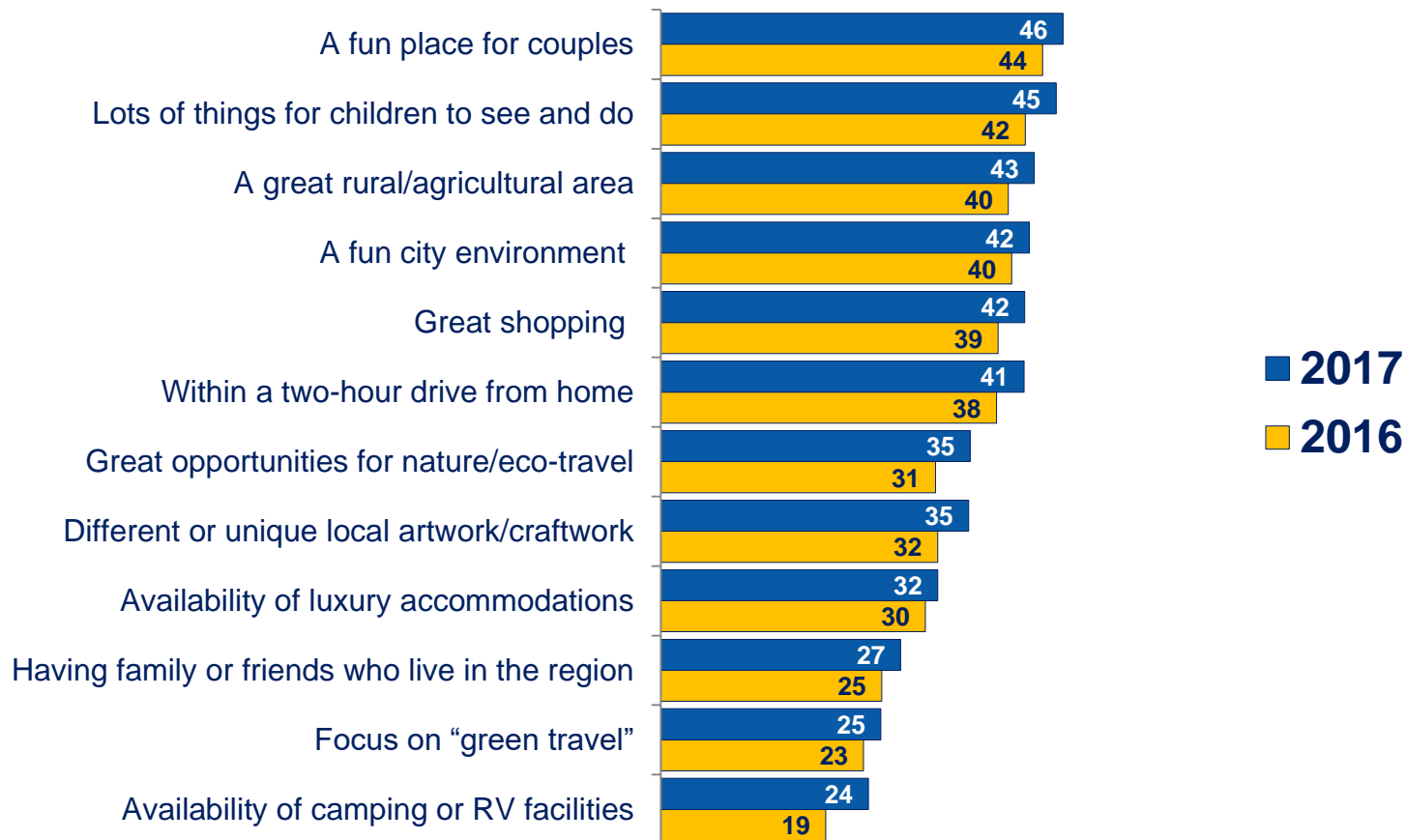


# Factors Influential In Choice of Dutch Country Roads Region (cont'd)



Base: Marketable Overnight Trips

% Rating Factor As Very Important\*



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

# Factors Influential In Choice of Lehigh Valley Region



Base: Total Overnight Trips

% Rating Factor As Very Important\*



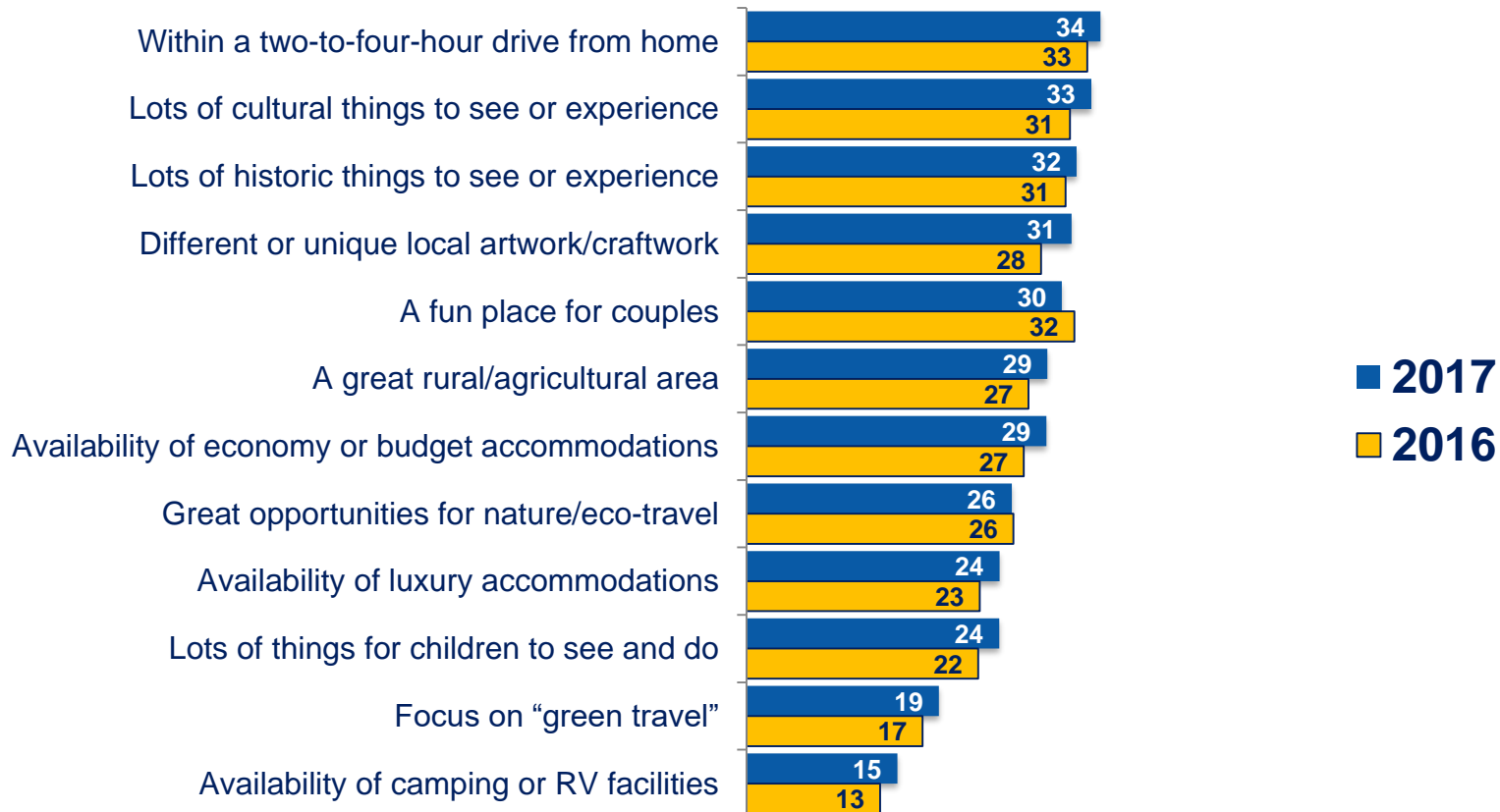
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Lehigh Valley Region (cont'd)



Base: Total Overnight Trips

## % Rating Factor As Very Important\*



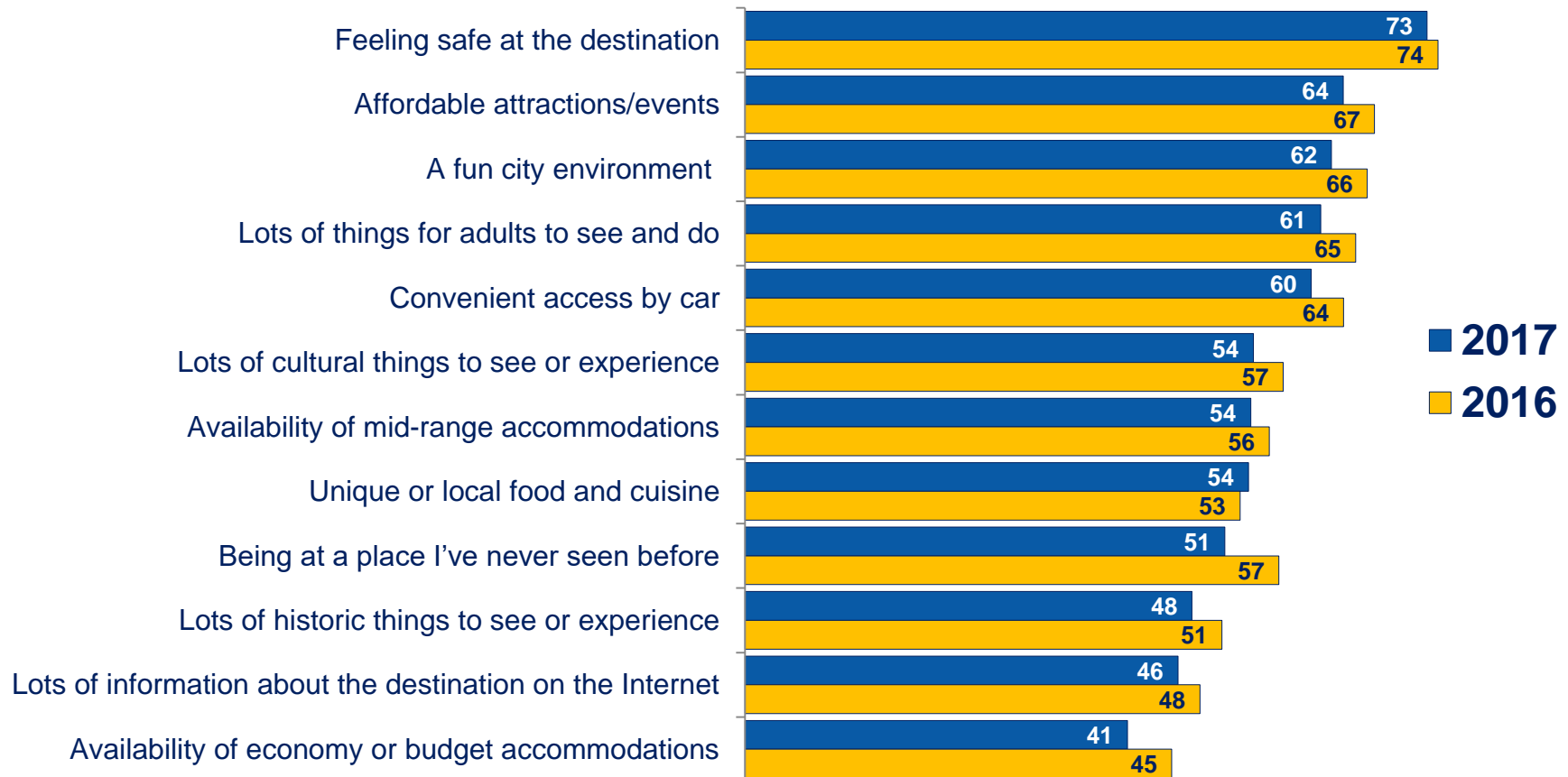
\* Rated 8, 9 or 10 on 10-pt. Importance scale

# Factors Influential In Choice of Philadelphia & The Countryside Region



Base: Marketable Overnight Trips

% Rating Factor As Very Important\*



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

# Factors Influential In Choice of Philadelphia & The Countryside Region (cont'd)



Base: Marketable Overnight Trips

% Rating Factor As Very Important\*



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

# **Product Delivery — Marketable Overnight Trips**

# Traveler Priorities

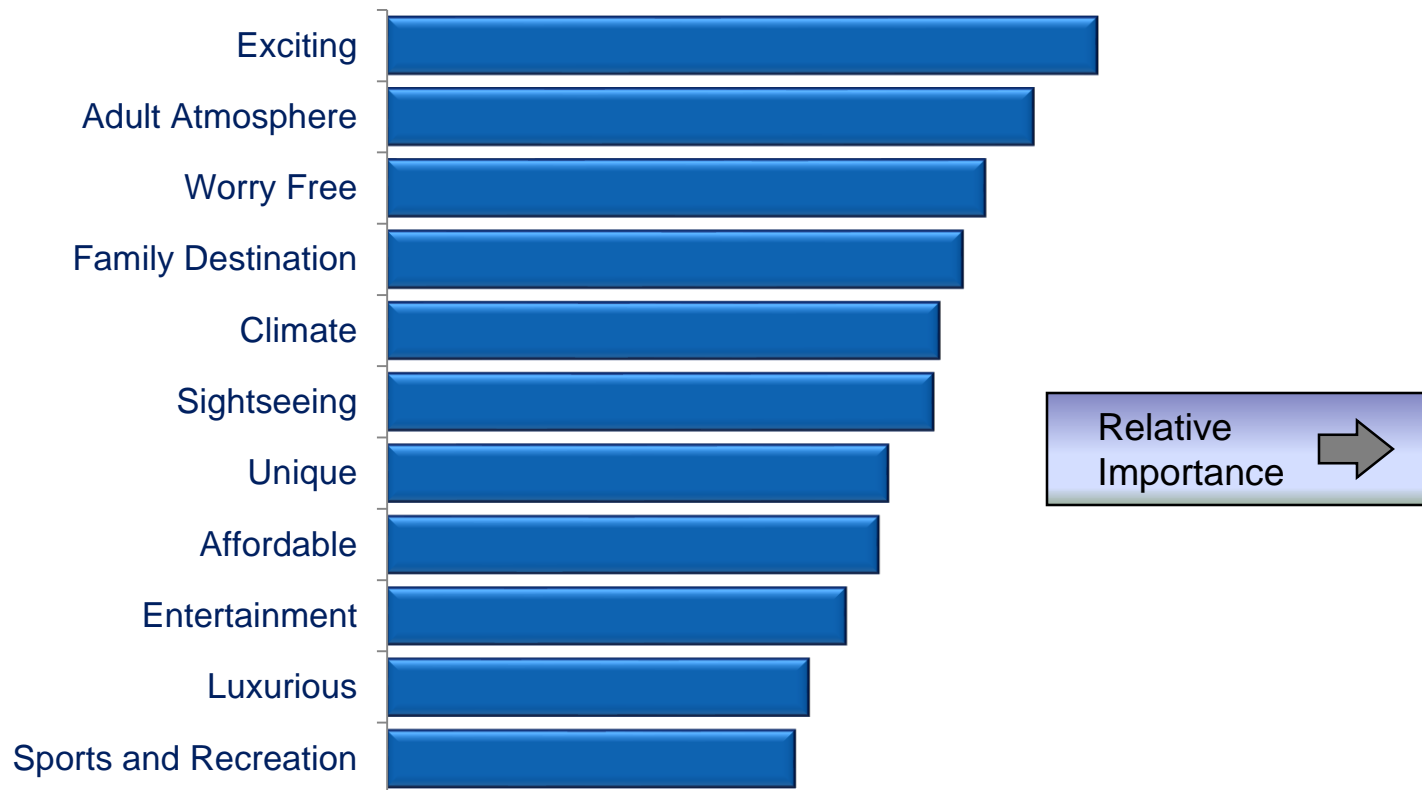


- ❖ Respondents were asked to rate Pennsylvania (on a scale of 1 to 10) on approximately 60 destination attributes.
- ❖ A factor analysis was undertaken to organize these attributes into 11 categories, or factors, in order to simplify discussion.
- ❖ The degree of association between each factor was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

# Traveler Priorities in 2017



Base: Total Overnight Trips



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



# Travelers' "Hot Buttons," 2017



Base: Total Overnight Trips

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

**1 A fun place for a vacation/getaway**

**2 Lots to see and do**

**3 Good for adult vacation/getaway**

**4 Exciting destination**

**5 A place I would feel welcome**

**6 Good place for families to visit**

**7 Truly beautiful scenery**

**8 A good place for couples to visit**

**9 Good place to get away and relax**

**10 Interesting fairs/festivals**

# Product Delivery



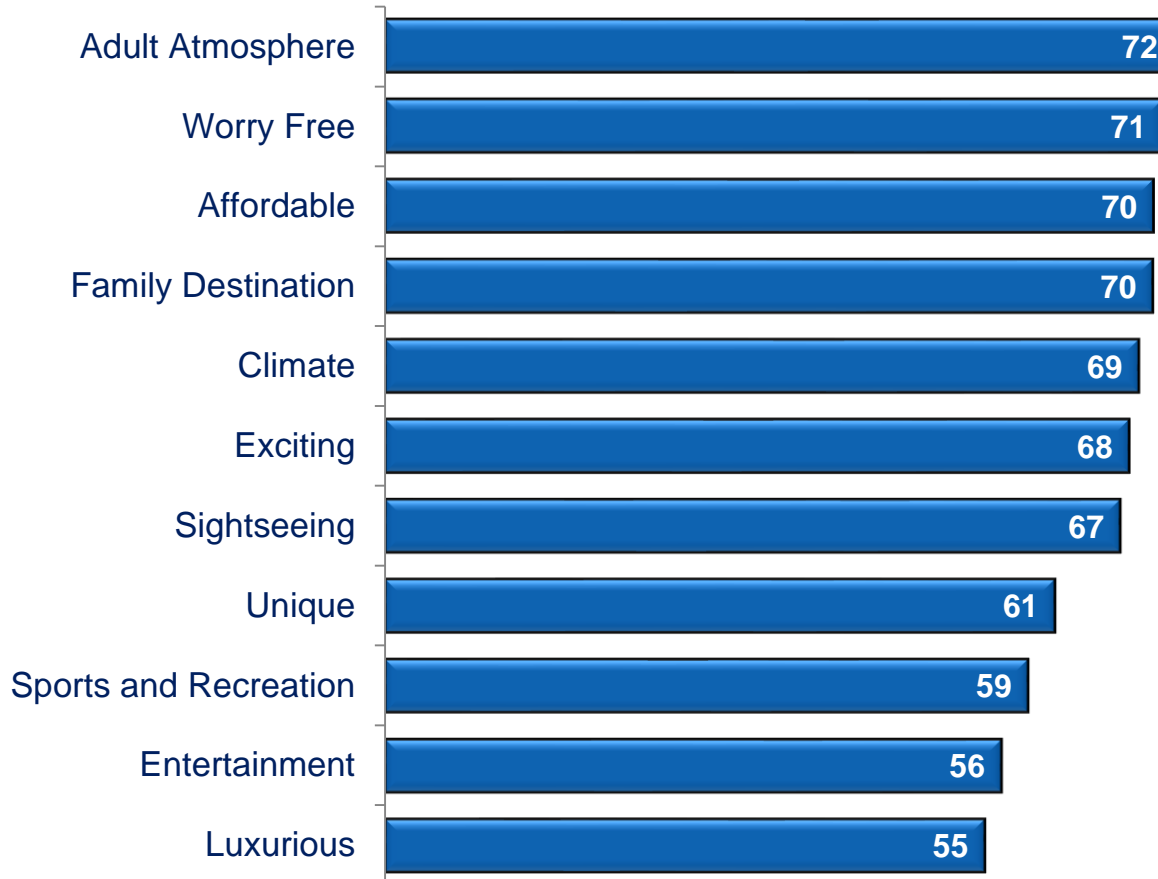
- ❖ Image ratings by recent visitors can be viewed as product ratings such that recent visitors are, presumably, rating Pennsylvania based their personal experience.
- ❖ Pennsylvania's image strengths among recent visitors include its history, beautiful scenery, access, proximity, a good place for adults to visit and it's well known landmarks. Pennsylvania is also seen as a safe, relaxing, fun, interesting, welcoming place with lots to see and do.

# Pennsylvania's Product Delivery



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*

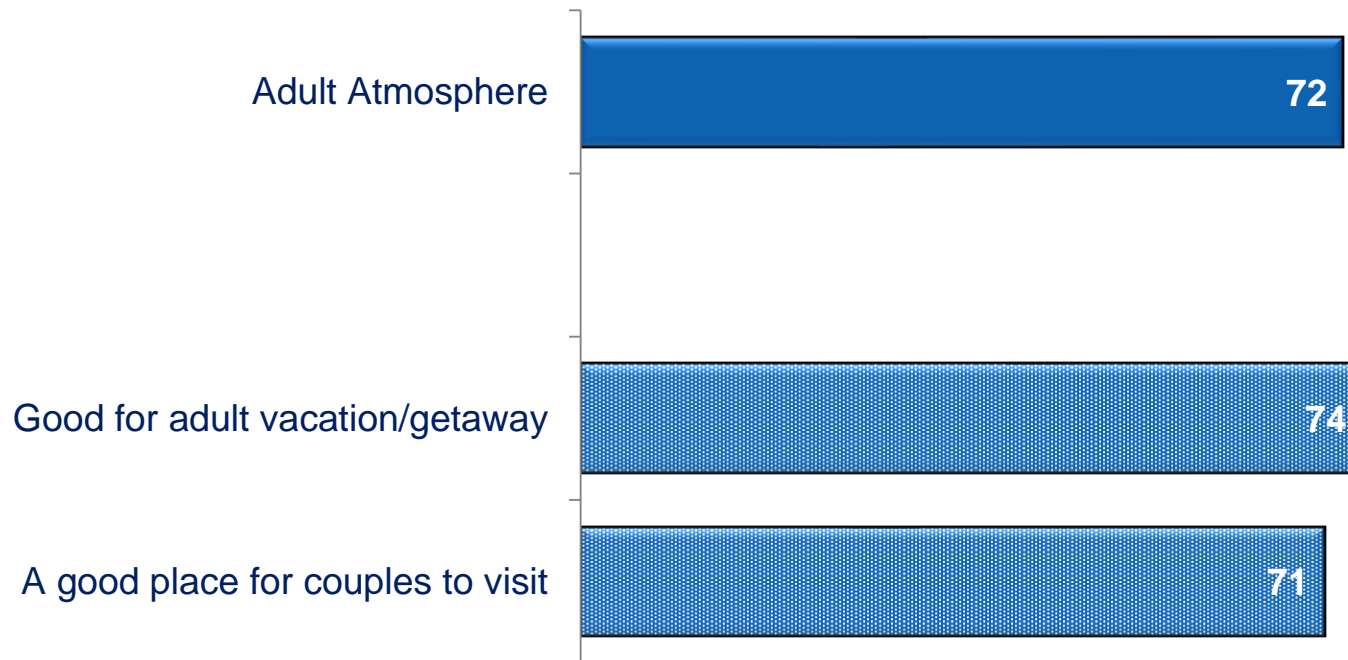


# Pennsylvania's Product Delivery — Adult Atmosphere



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Worry Free



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*

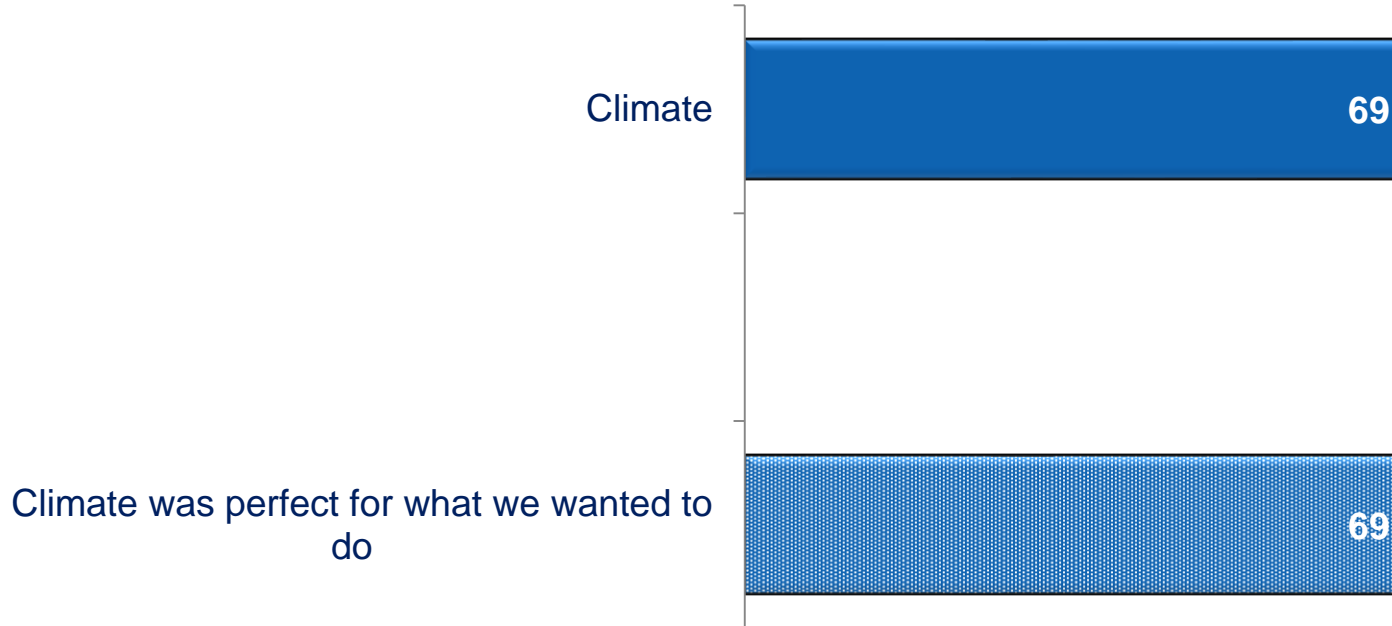


# Pennsylvania's Product Delivery — Climate



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Affordable



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*



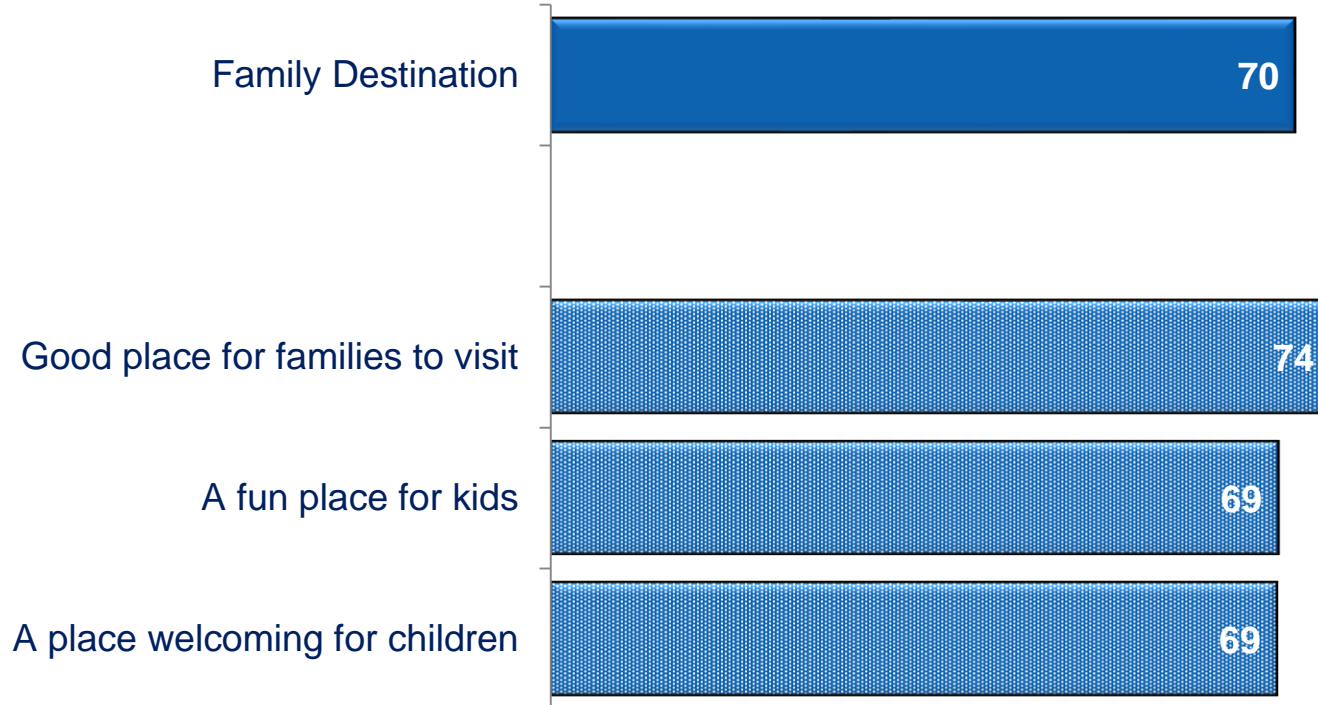


# Pennsylvania's Product Delivery — Family Destination



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*



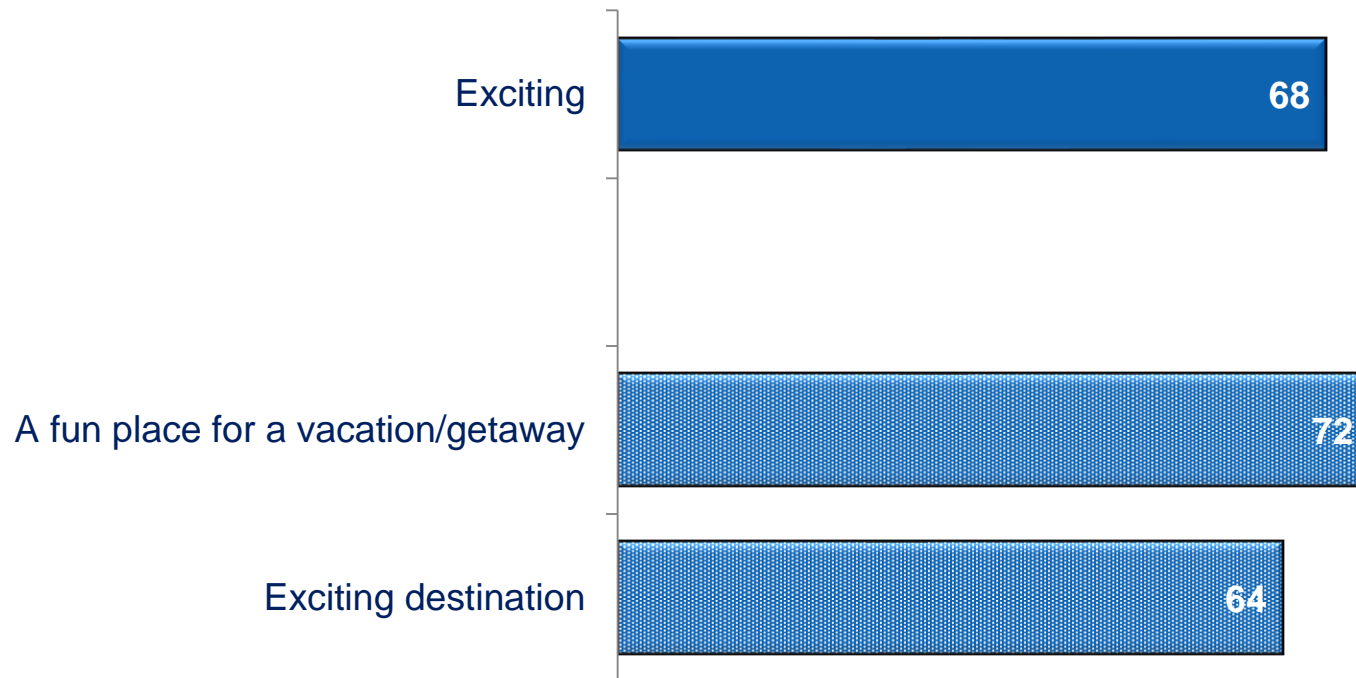


# Pennsylvania's Product Delivery — Exciting



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*

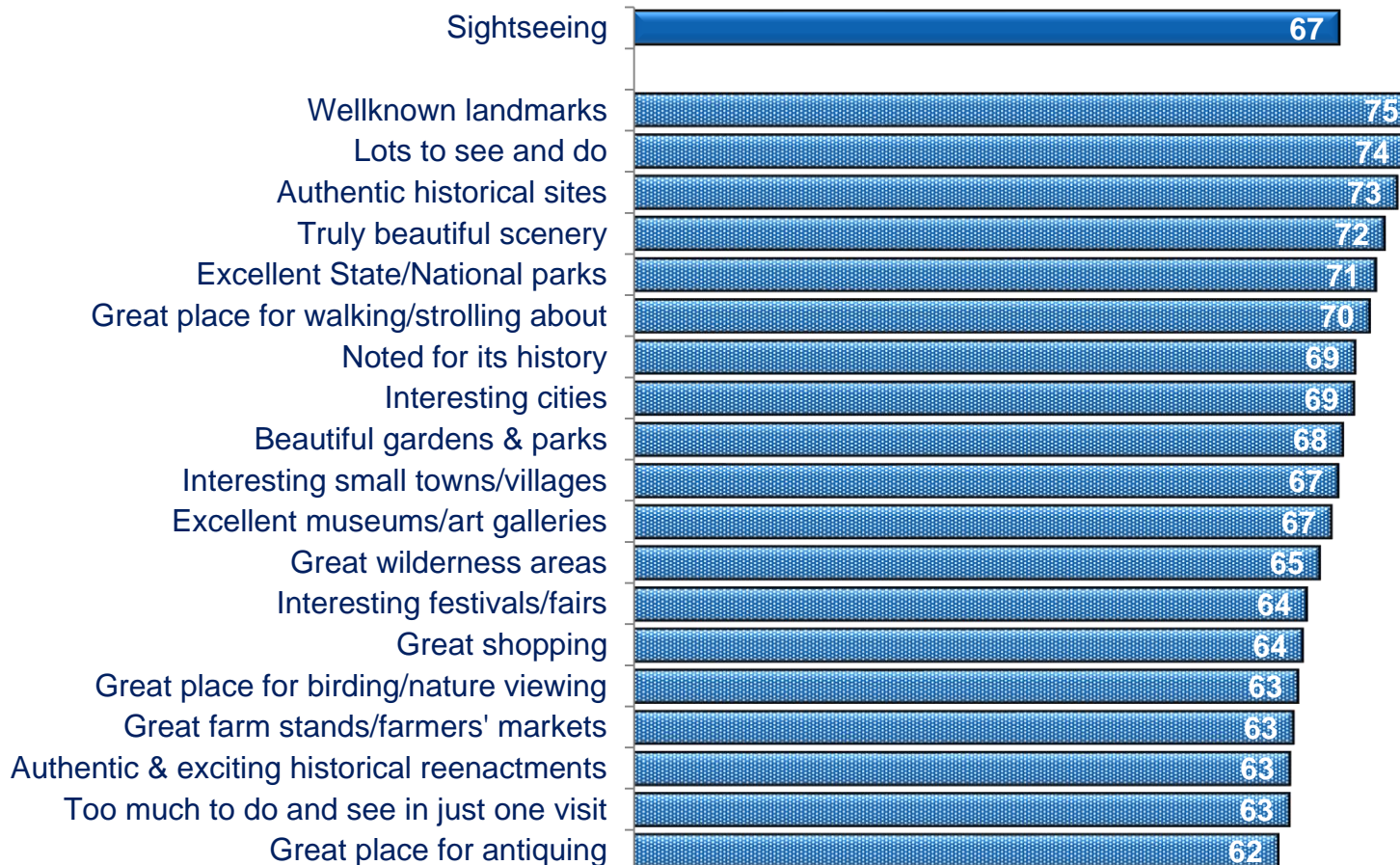


# Pennsylvania's Product Delivery — Sightseeing



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*

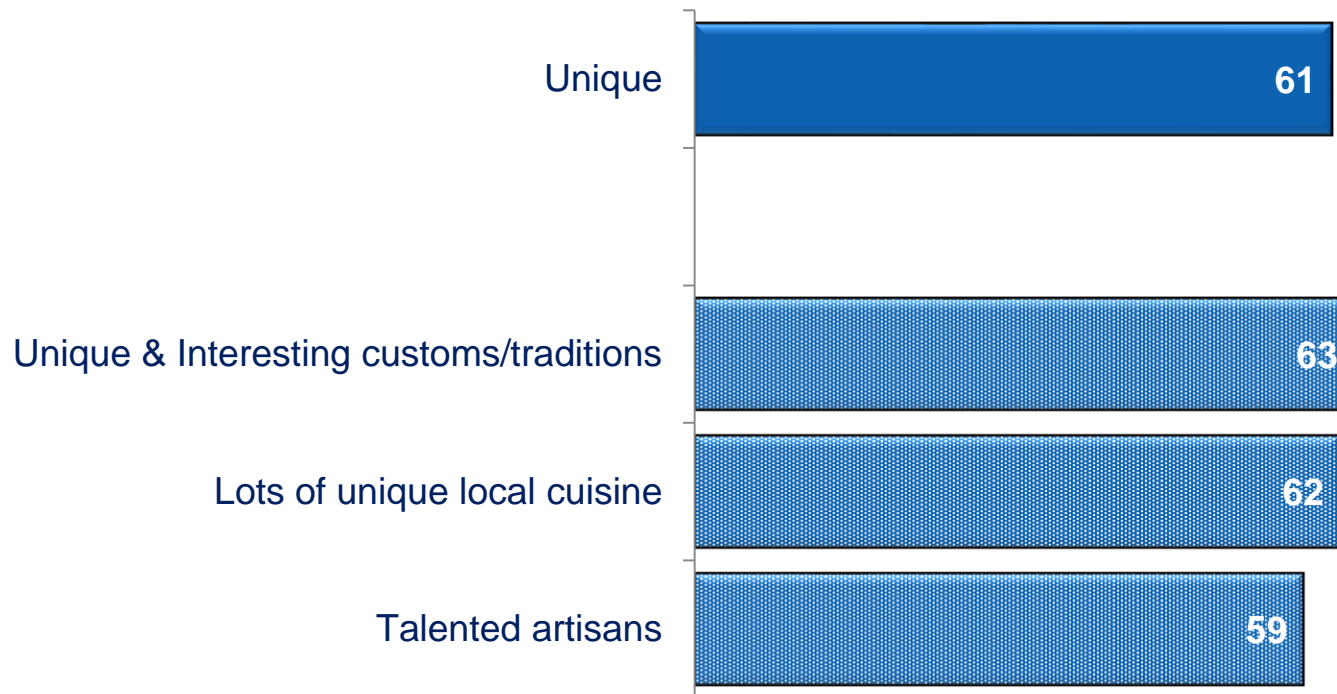


# Pennsylvania's Product Delivery — Unique



Base: Marketable Overnight Trips

*Percent Who Strongly Agree*

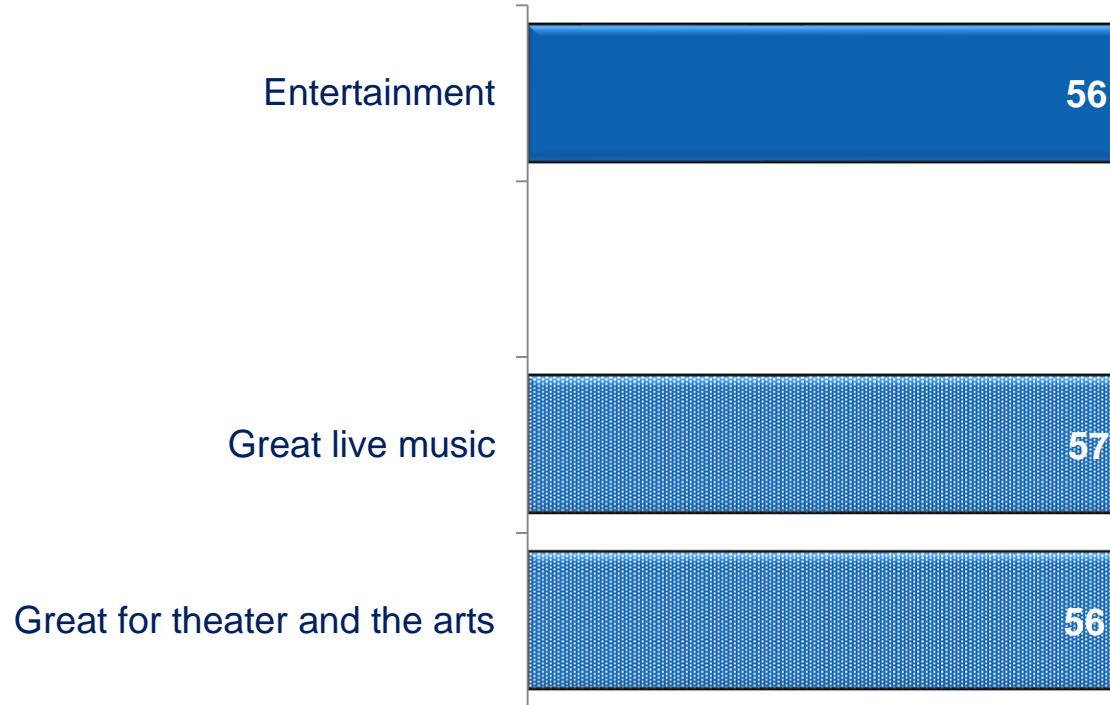


# Pennsylvania's Product Delivery — Entertainment



Base: Marketable Overnight Trips

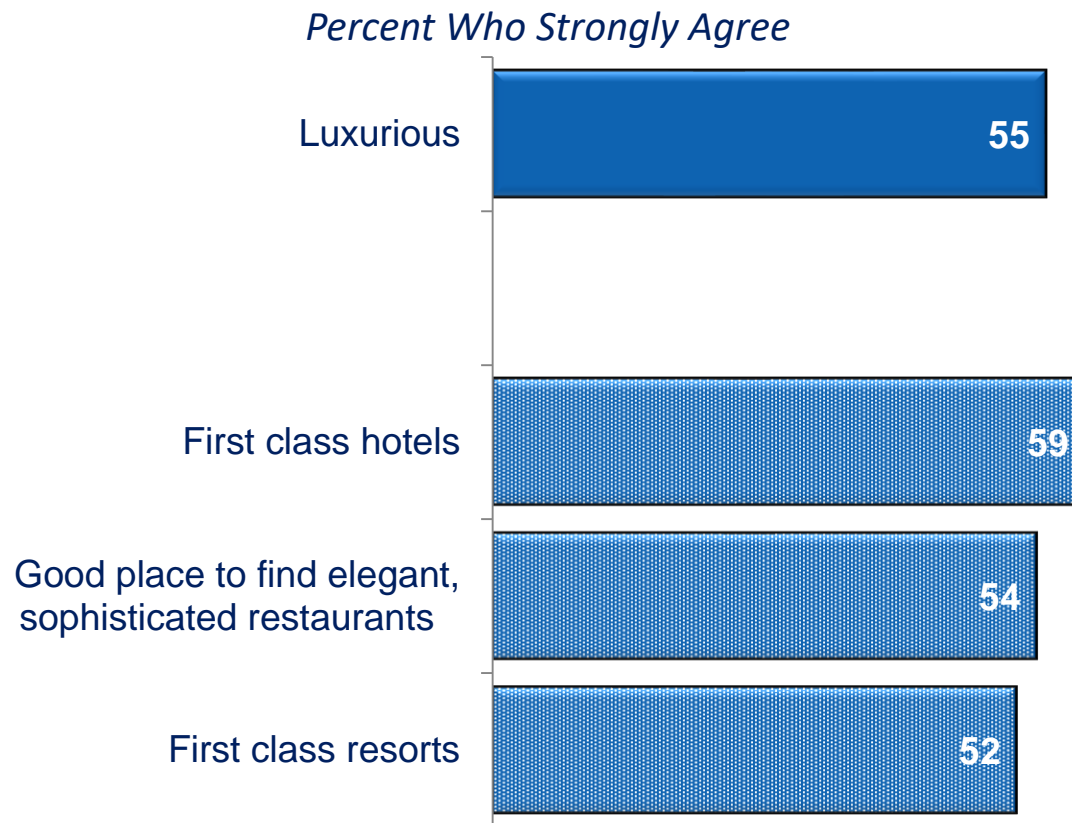
*Percent Who Strongly Agree*



# Pennsylvania's Product Delivery — Luxurious



Base: Marketable Overnight Trips





# Pennsylvania's Product Delivery — Sports & Recreation



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*



# Pennsylvania's Top 20 Image Attributes, 2017



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*

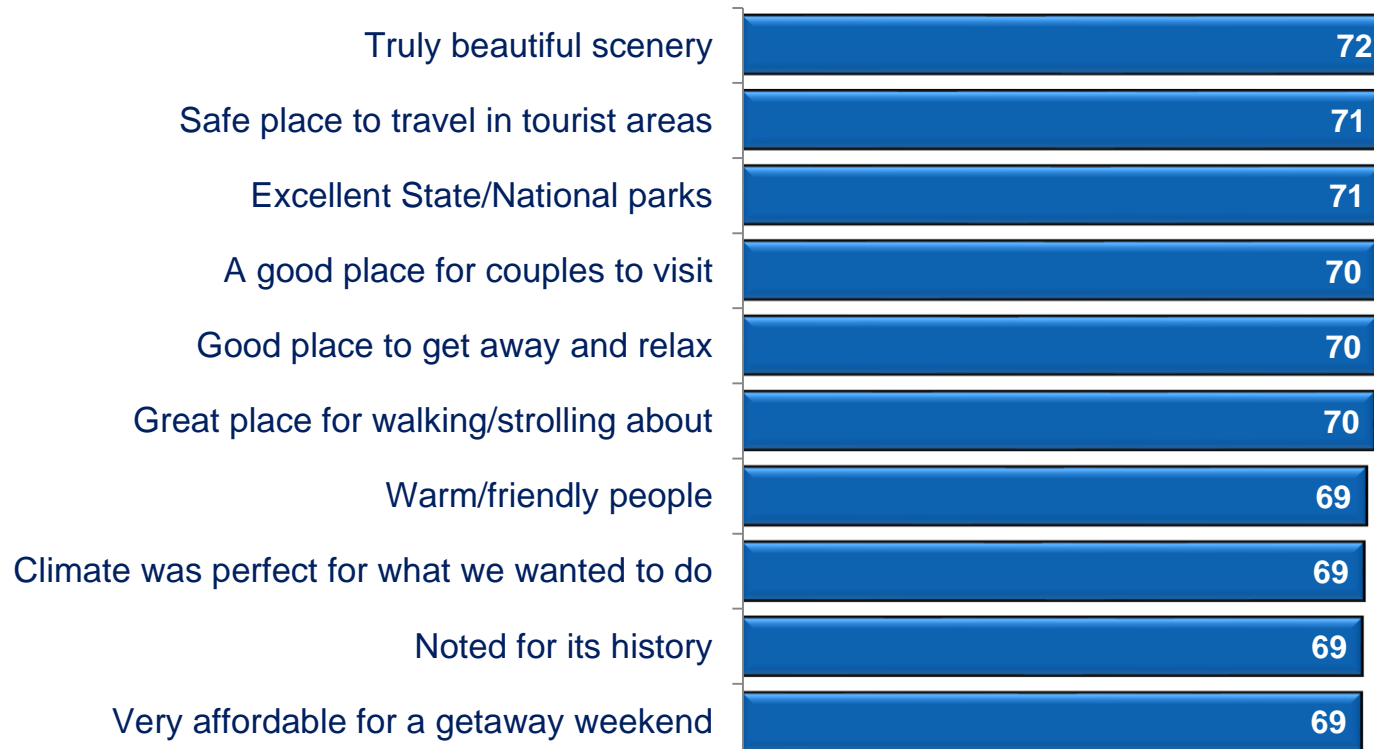


# Pennsylvania's Top 20 Image Attributes, 2017 (cont'd)



Base: Marketable Overnight Trips

## *Percent Who Strongly Agree*

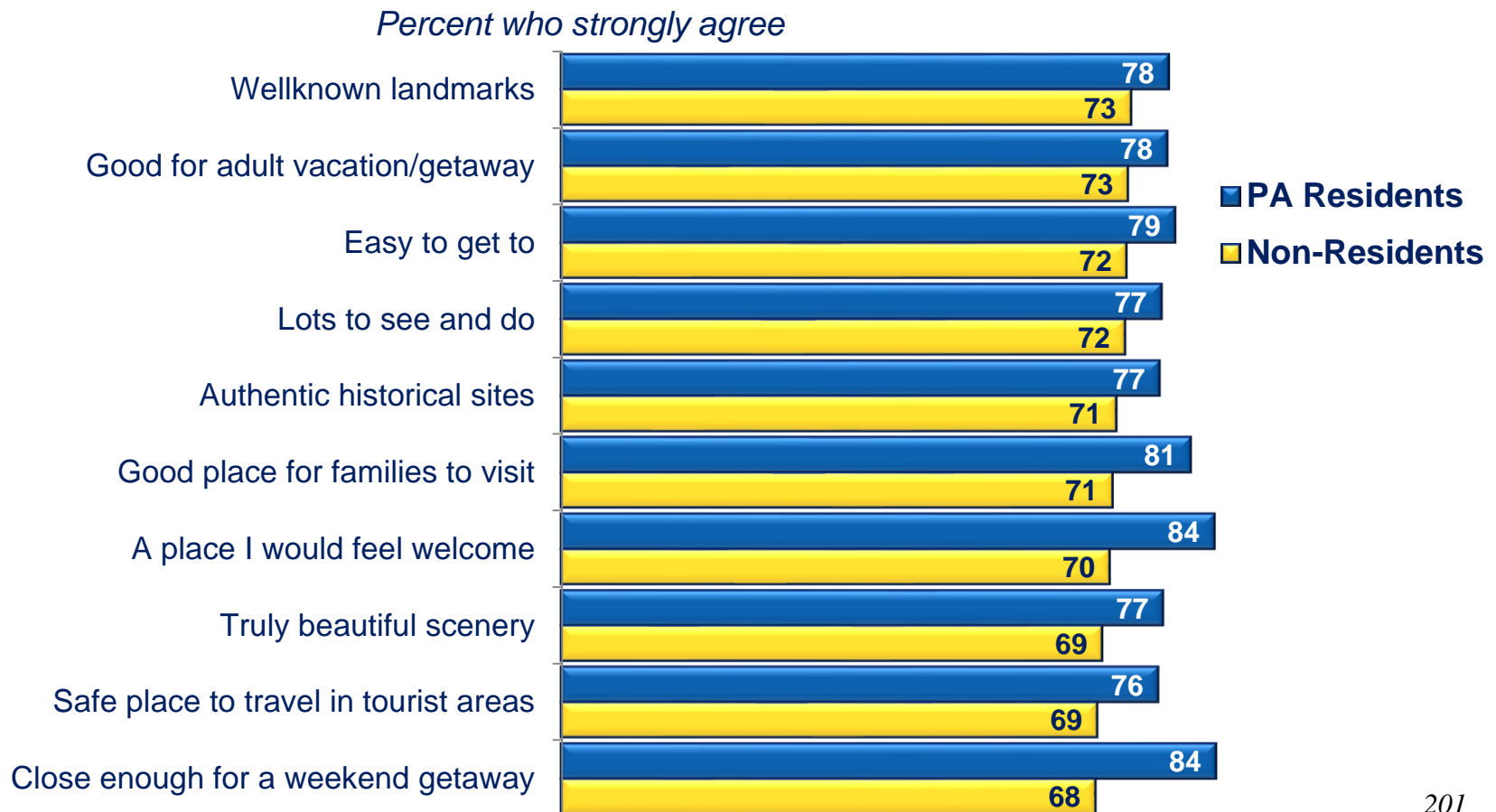




# Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents, 2017



Base: Marketable Overnight Trips



# Pennsylvania's Top 20 Image Attributes: PA Residents vs. Non-Residents, 2017 (cont'd)



Base: Marketable Overnight Trips

*Percent who strongly agree*

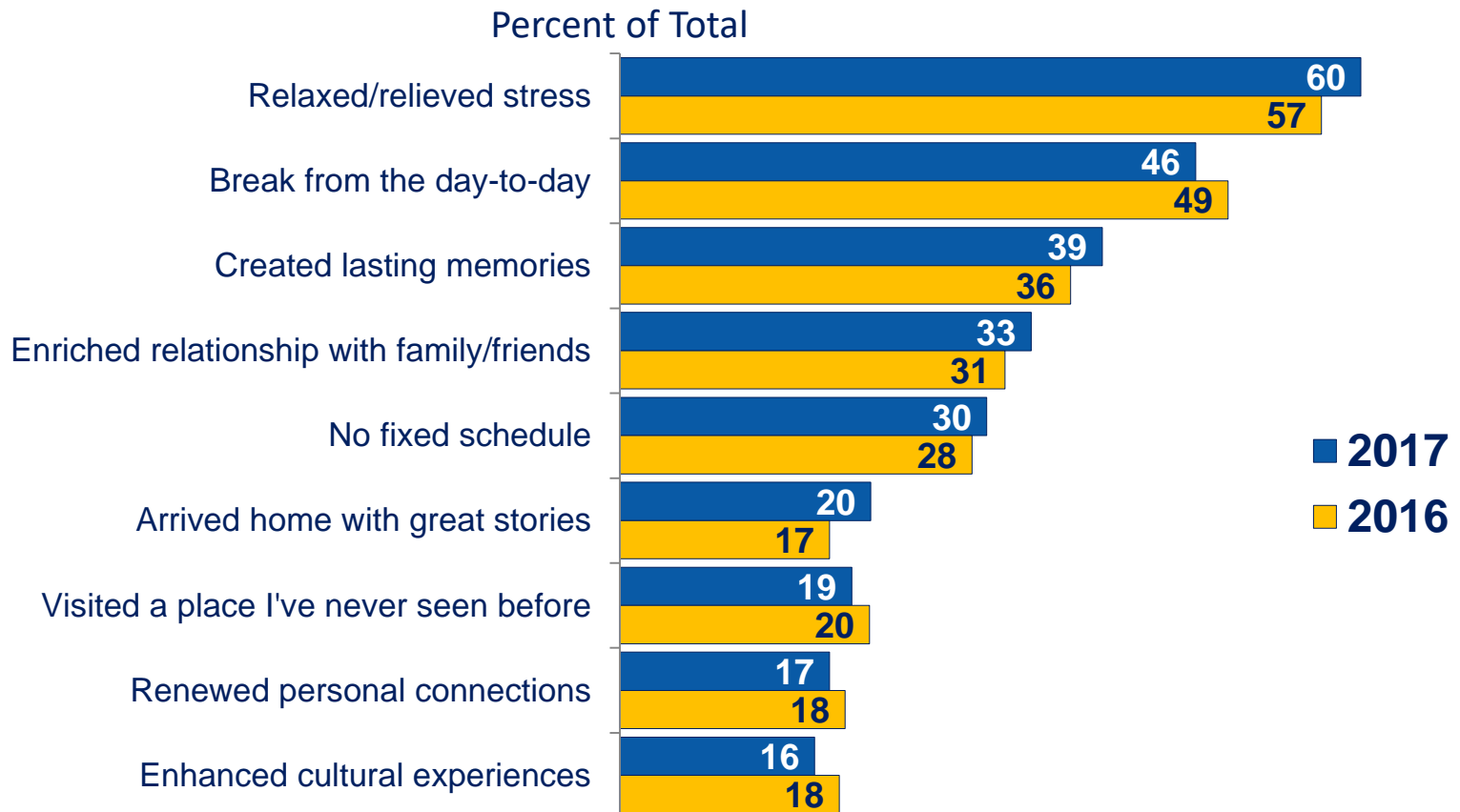


# **2017 Trip Benefits — Marketable Overnight Trips**

# Main Benefits From Pennsylvania Overnight Trip



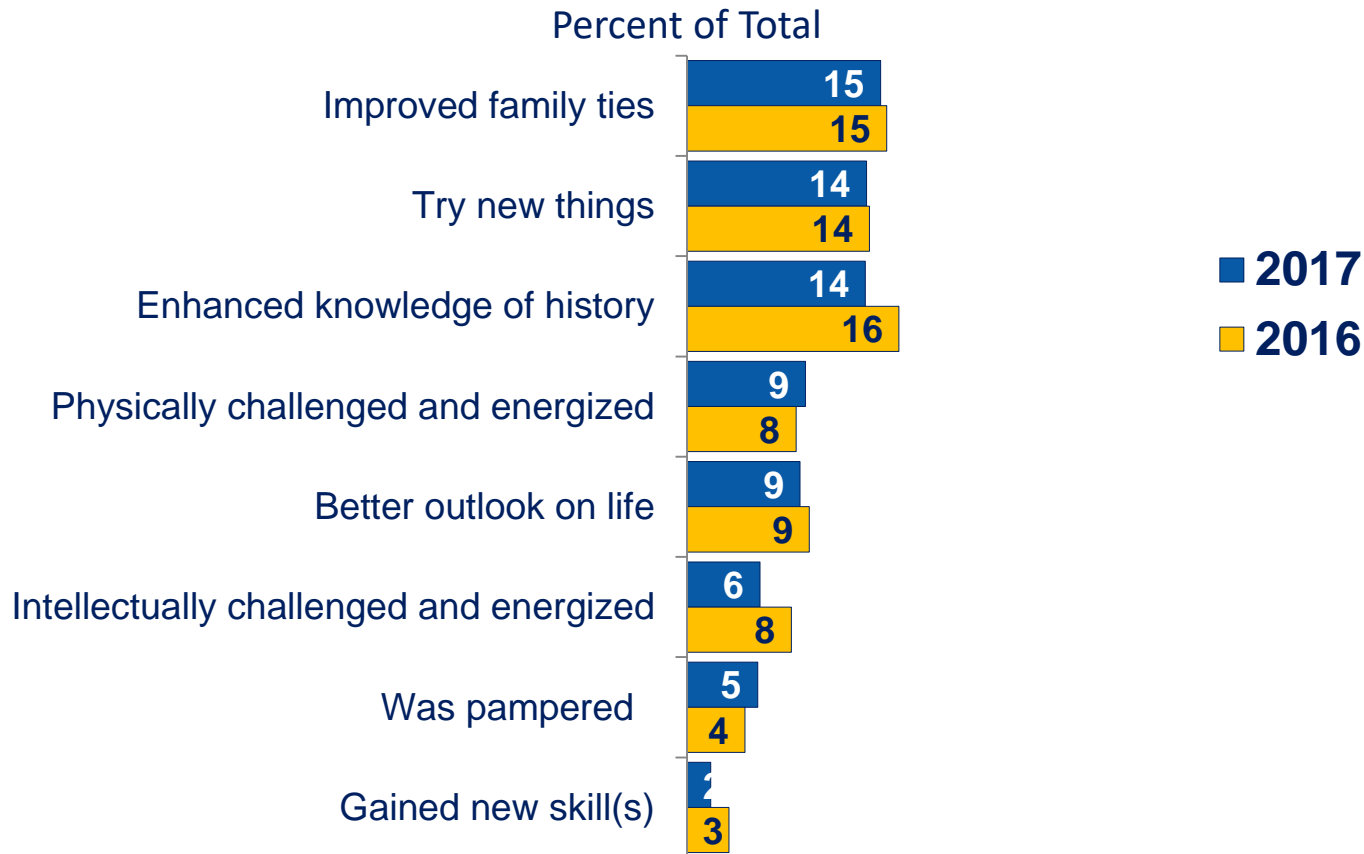
Base: Marketable Overnight Trips



# Main Benefits From Pennsylvania Overnight Trip (cont'd)



Base: Marketable Overnight Trips



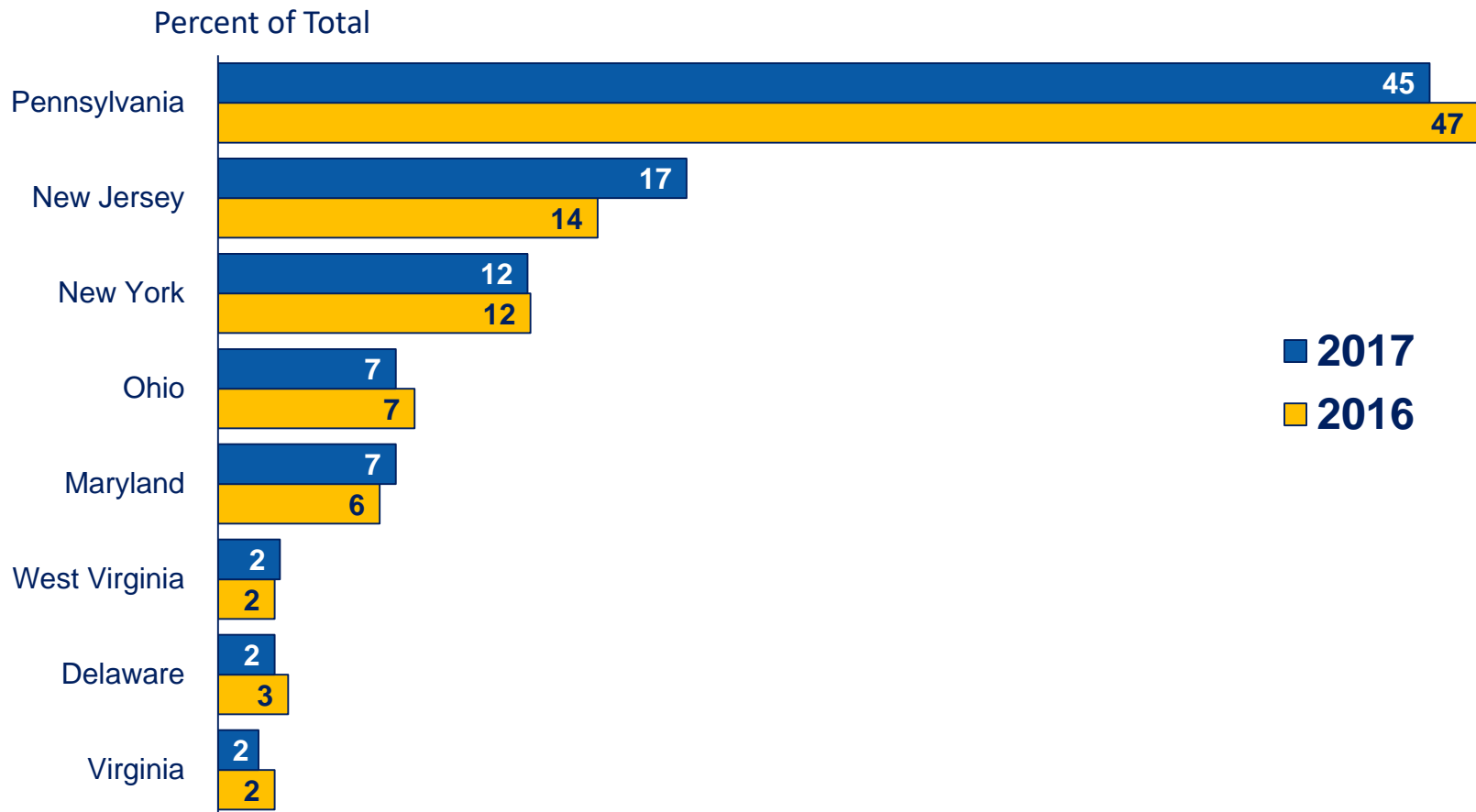
# **Pennsylvania Day-Trips**

# **Origin Markets — Pennsylvania Day-Trips**

# Main Origin States for Pennsylvania Marketable Day-Trip Travelers



Base: Marketable Day-Trips

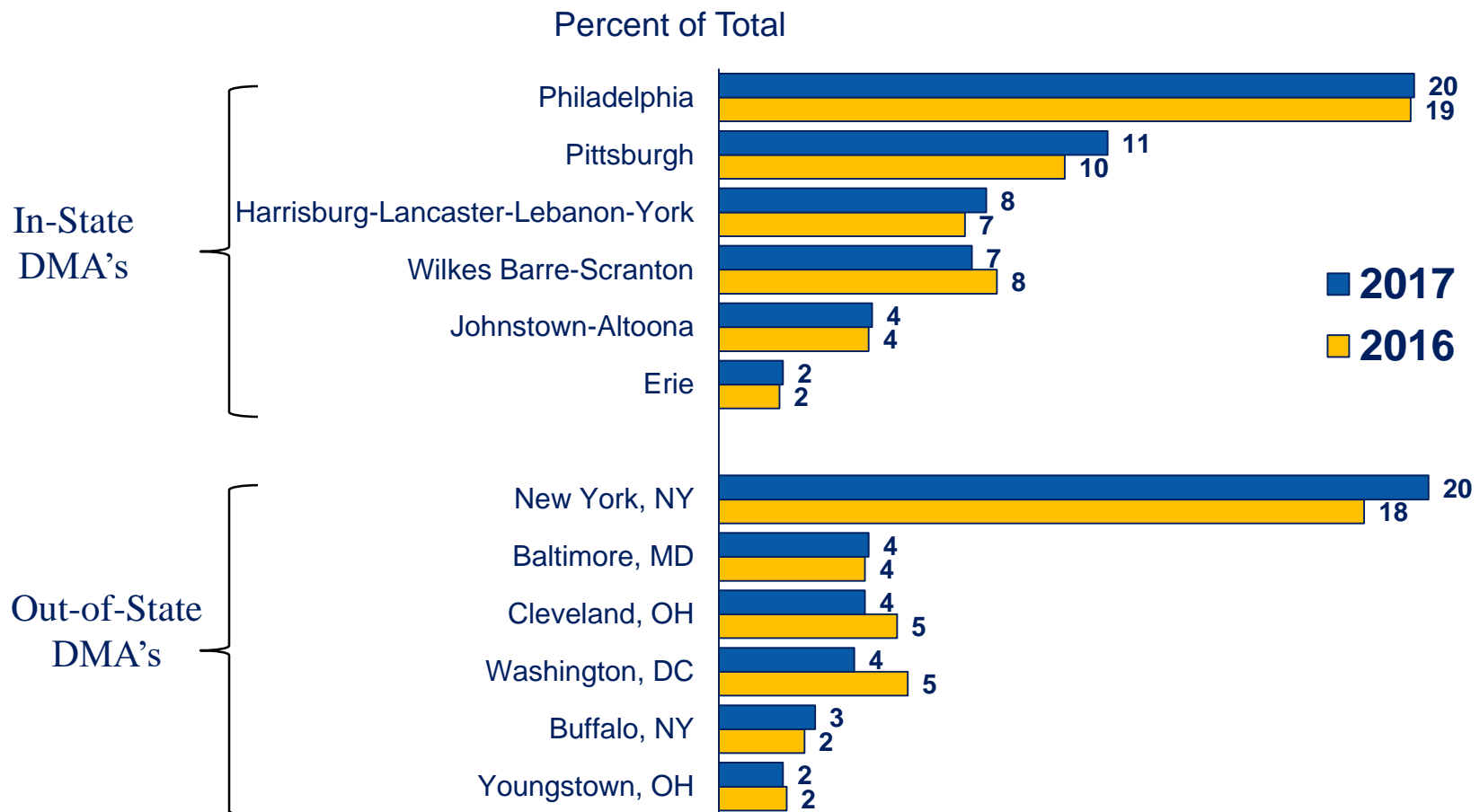




# Urban Origin Markets for Pennsylvania Marketable Day-Trip Travelers



Base: Marketable Day-Trips

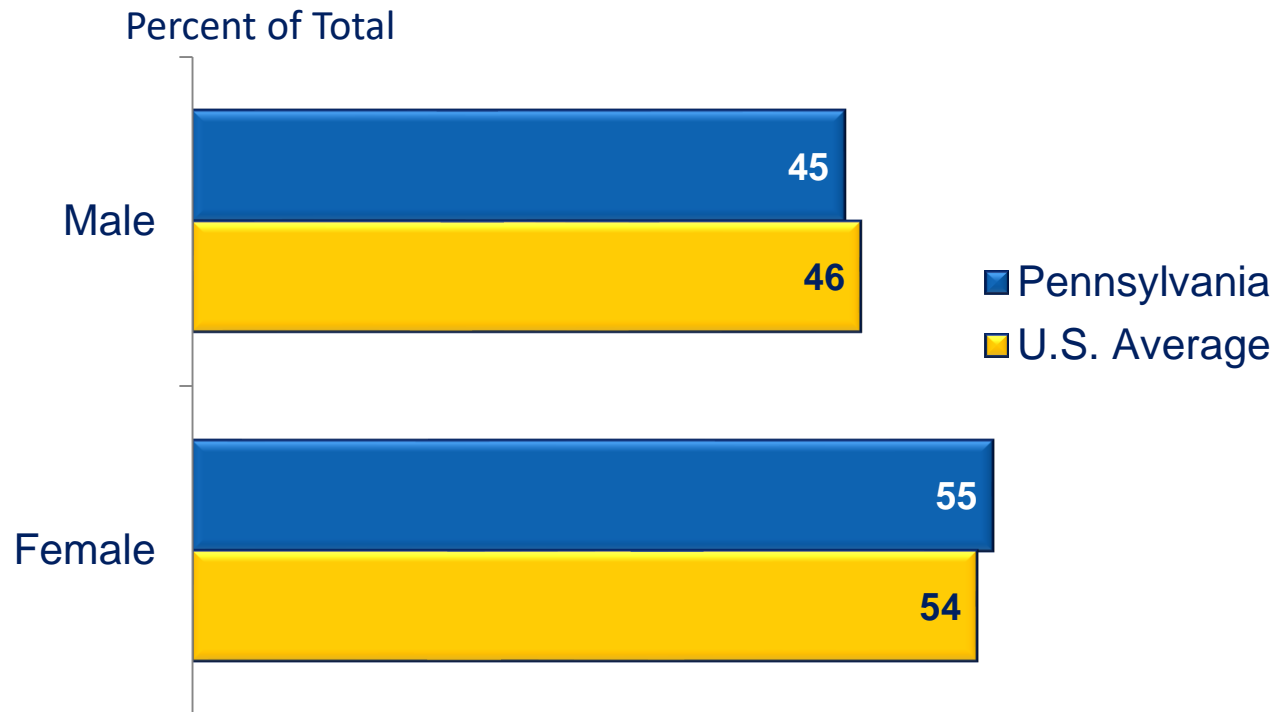


# **Traveler Profile — 2017 Marketable Day-Trips**

# Gender



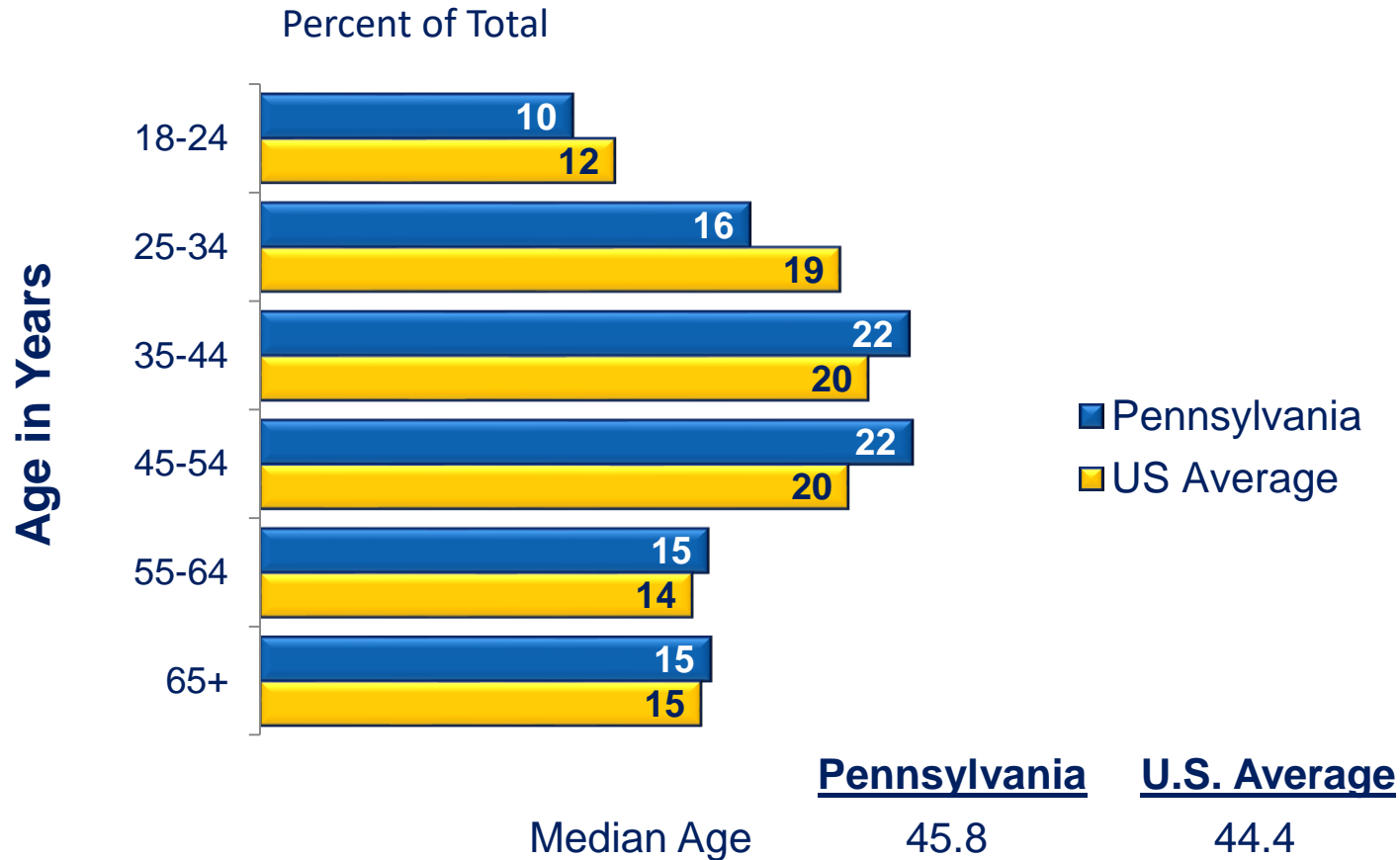
Base: Marketable Day-Trips



# Age



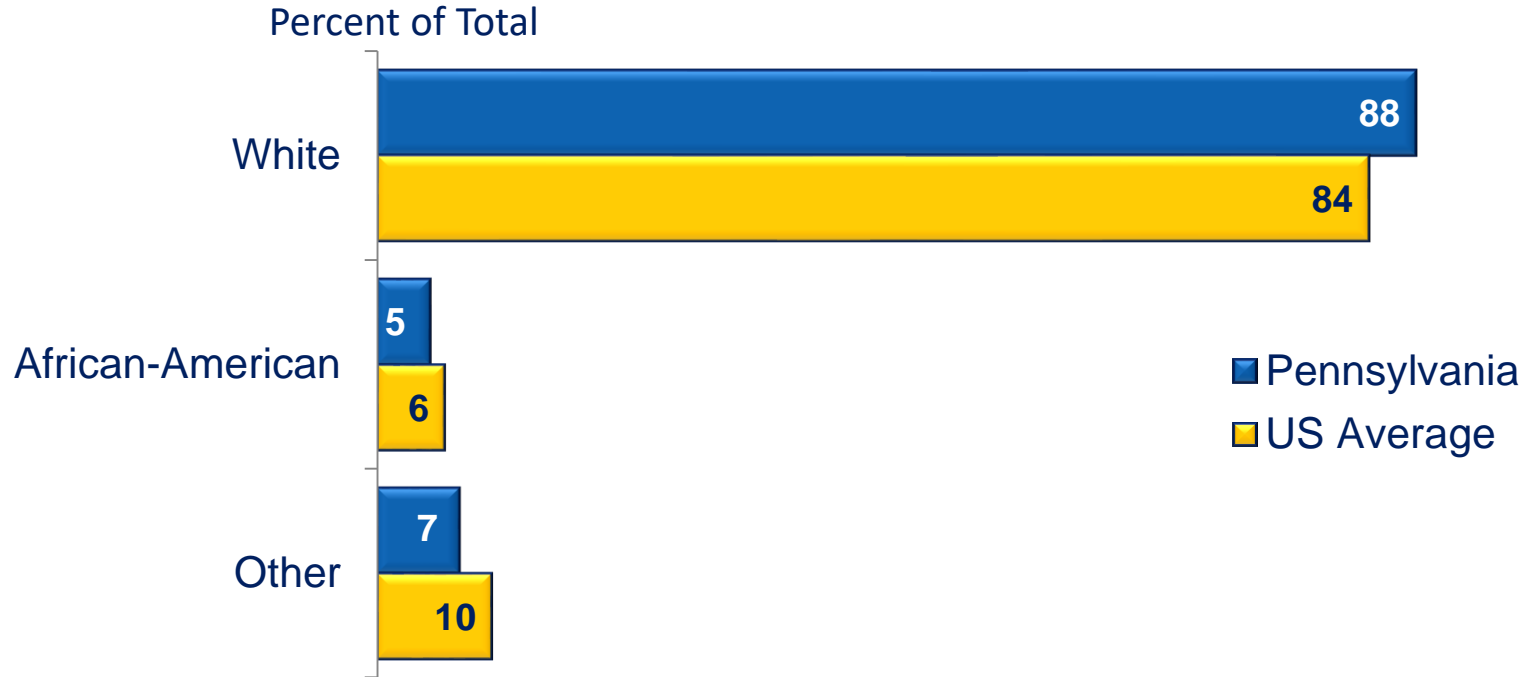
Base: Marketable Day-Trips



# Race



Base: Marketable Day-Trips



# Hispanic Background



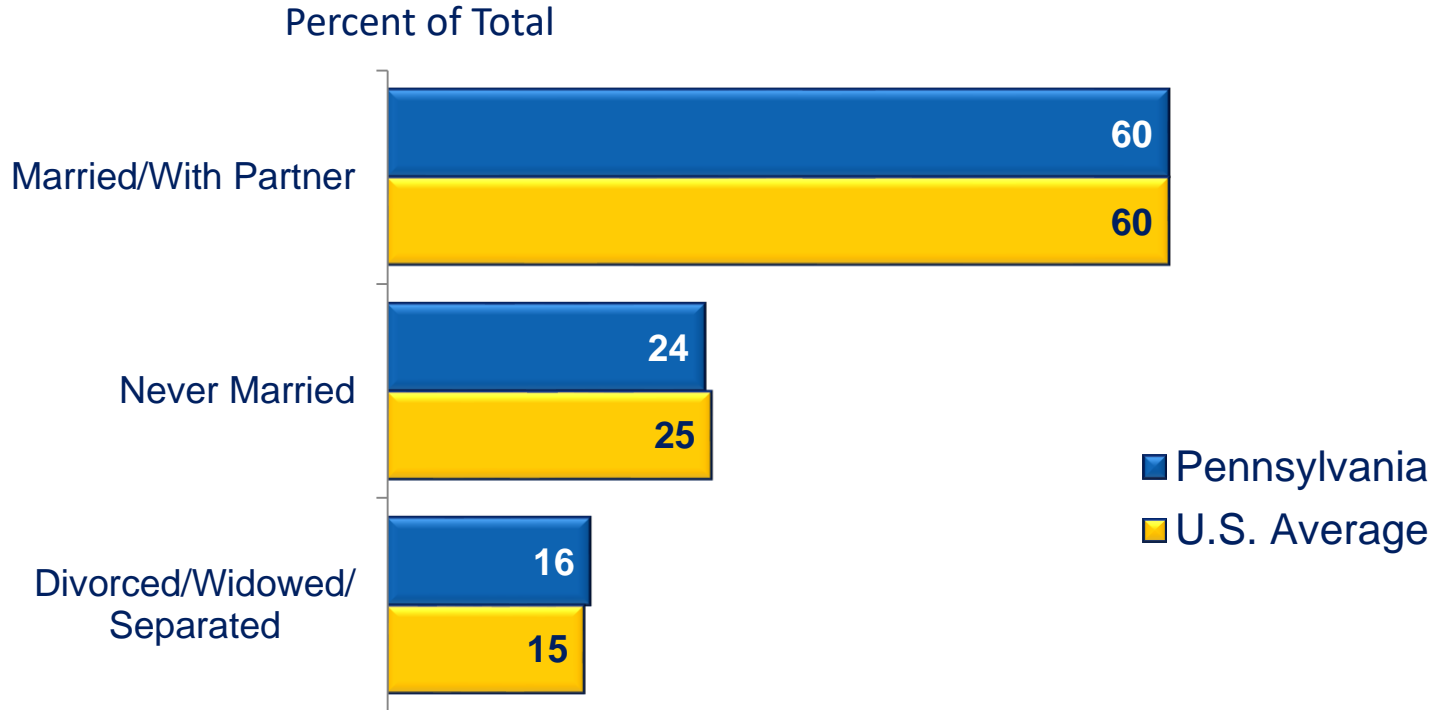
Base: Marketable Day-Trips



# Marital Status



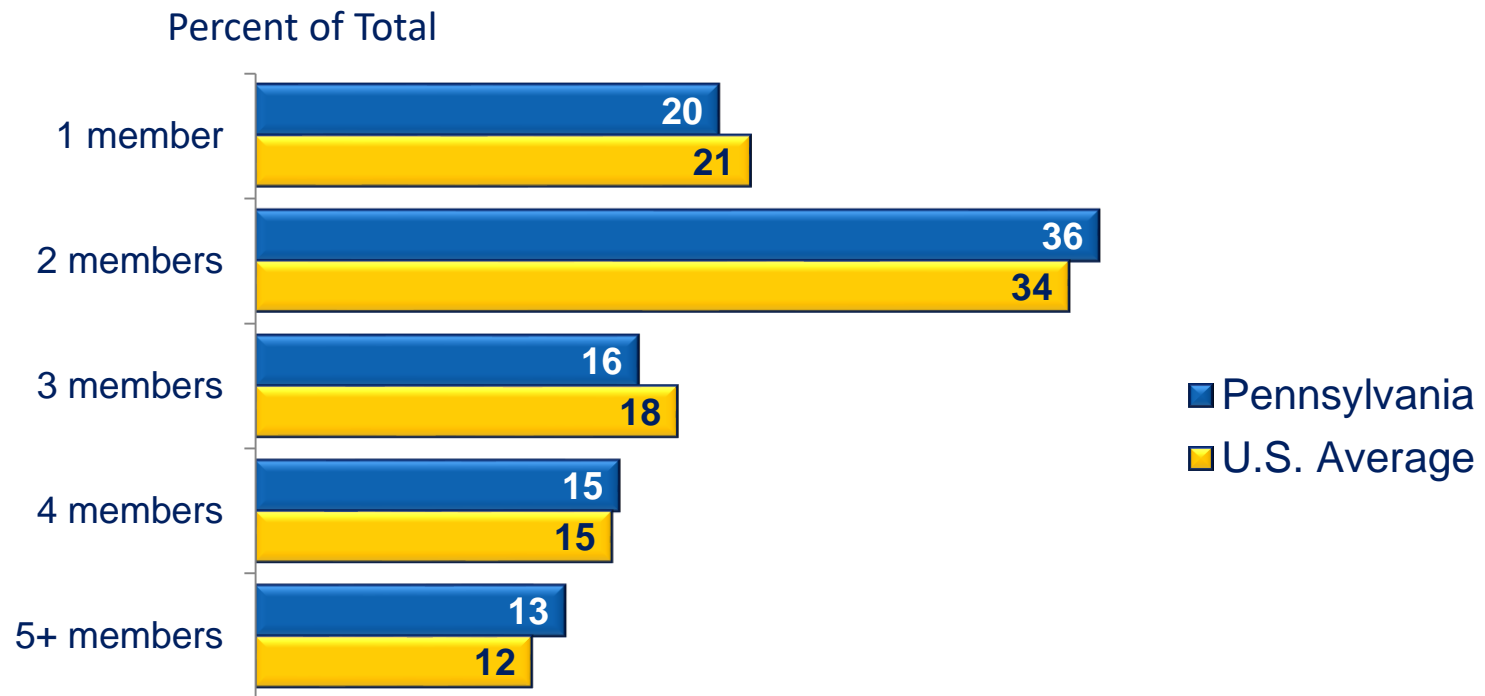
Base: Marketable Day-Trips



# Household Size



Base: Marketable Day-Trips



Average Household Size: Pennsylvania  
2.8

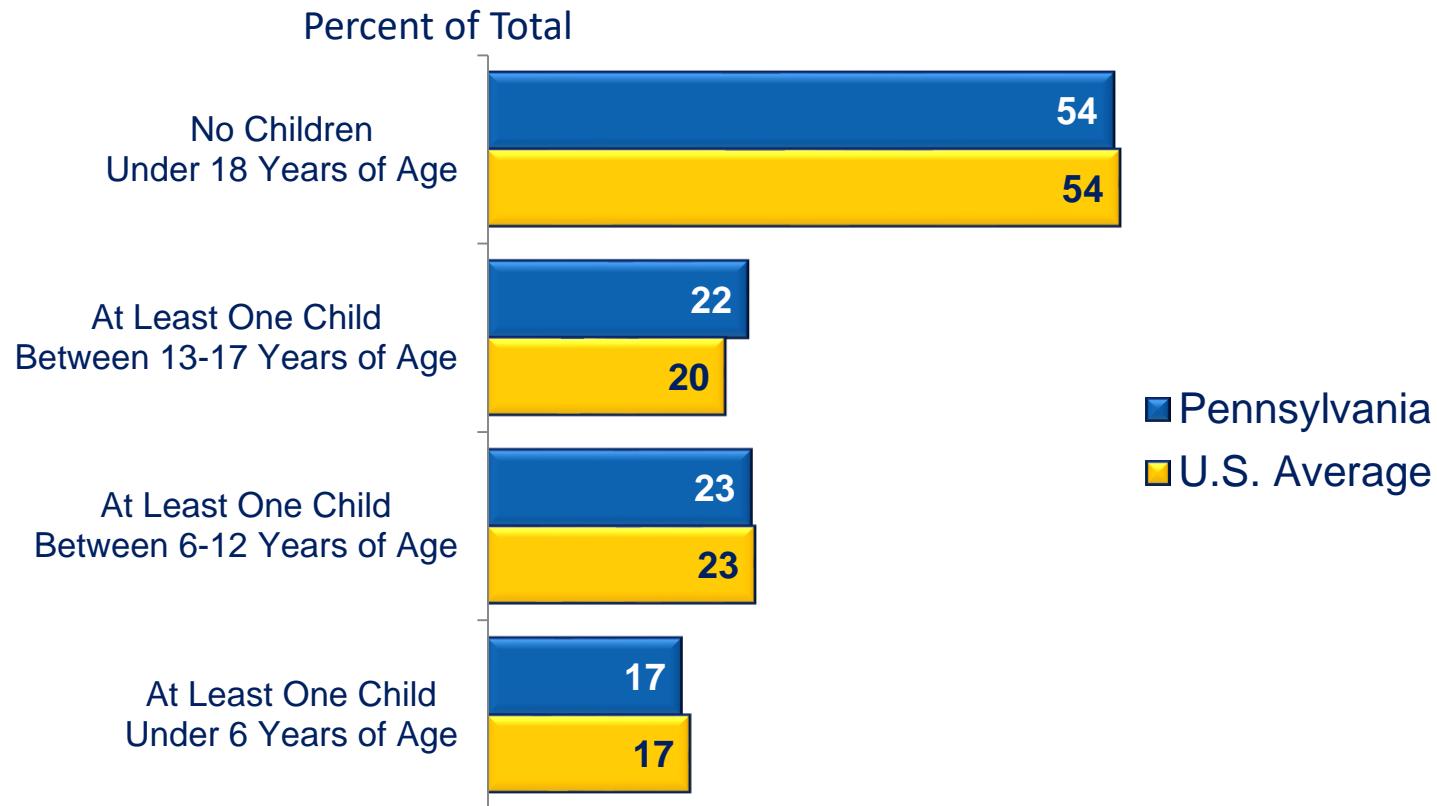
U.S. Average  
2.7



# Children in Household



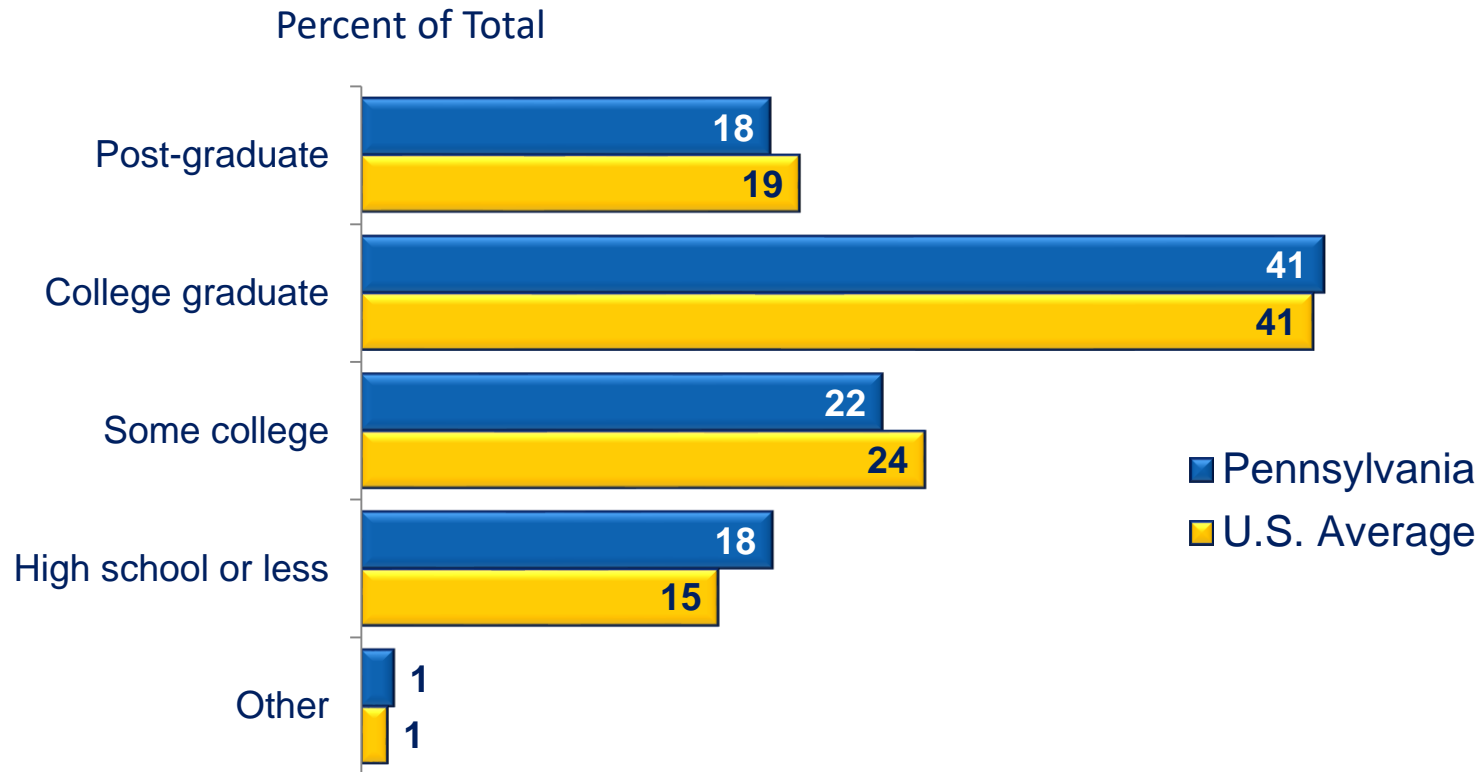
Base: Marketable Day-Trips



# Education



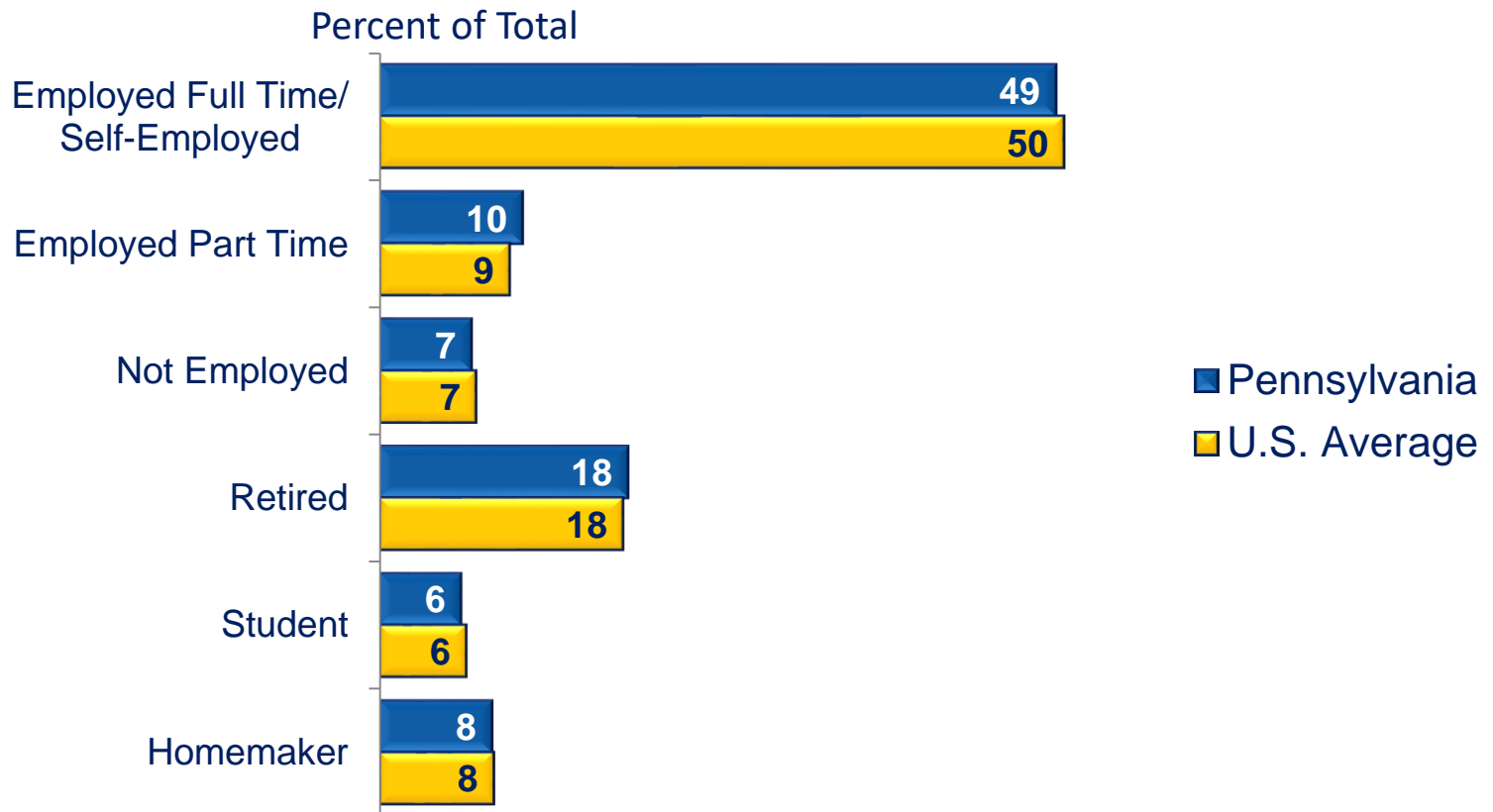
Base: Marketable Day-Trips



# Employment



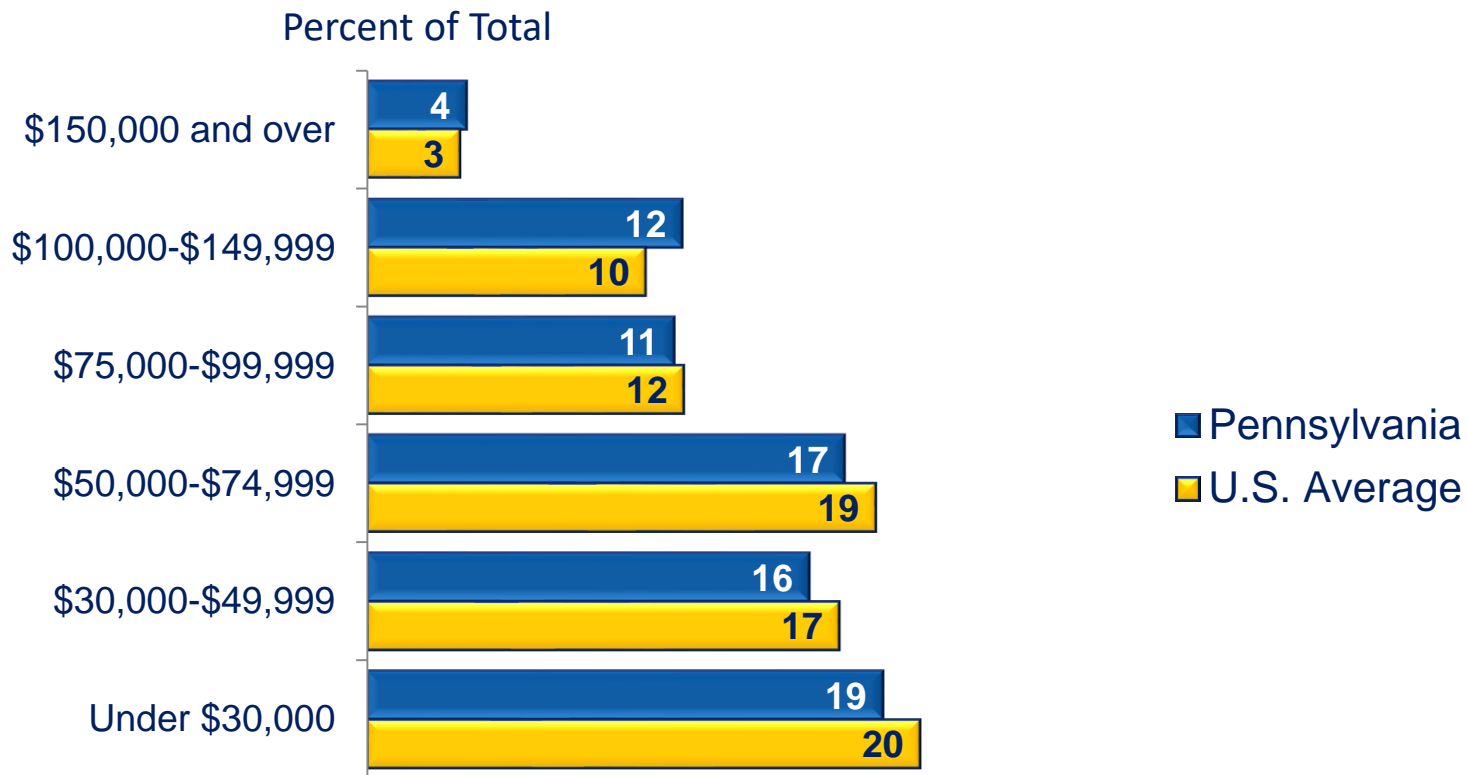
Base: Marketable Day-Trips



# Income



Base: Marketable Day-Trips



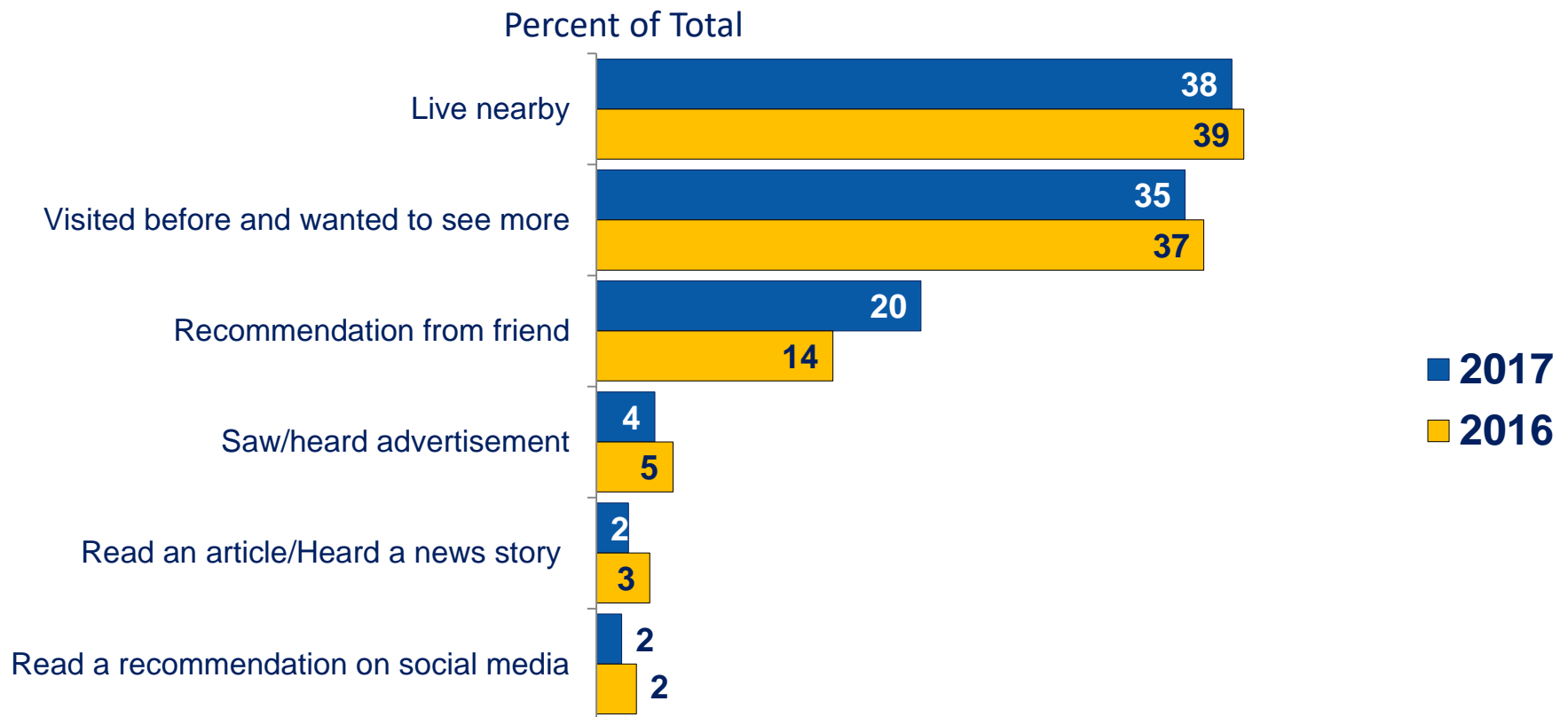
	<u>Pennsylvania</u>	<u>U.S. Average</u>
Median Household Income:	\$56,330	\$54,280

# **2017 Trip Planning & Booking — Marketable Day-Trips**

# Main Reason for Choosing Pennsylvania



Base: Marketable Day-Trips

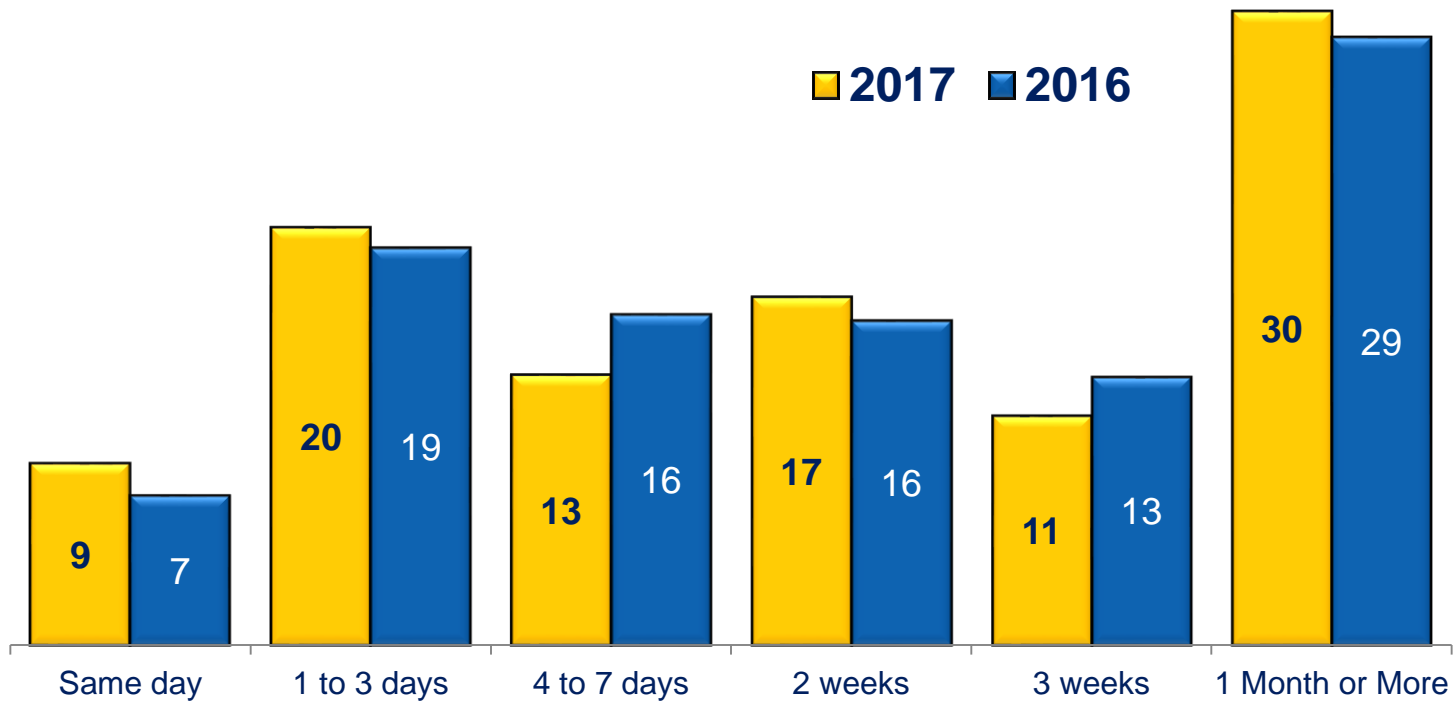


# Planning Cycle



Base: Marketable Day-Trips

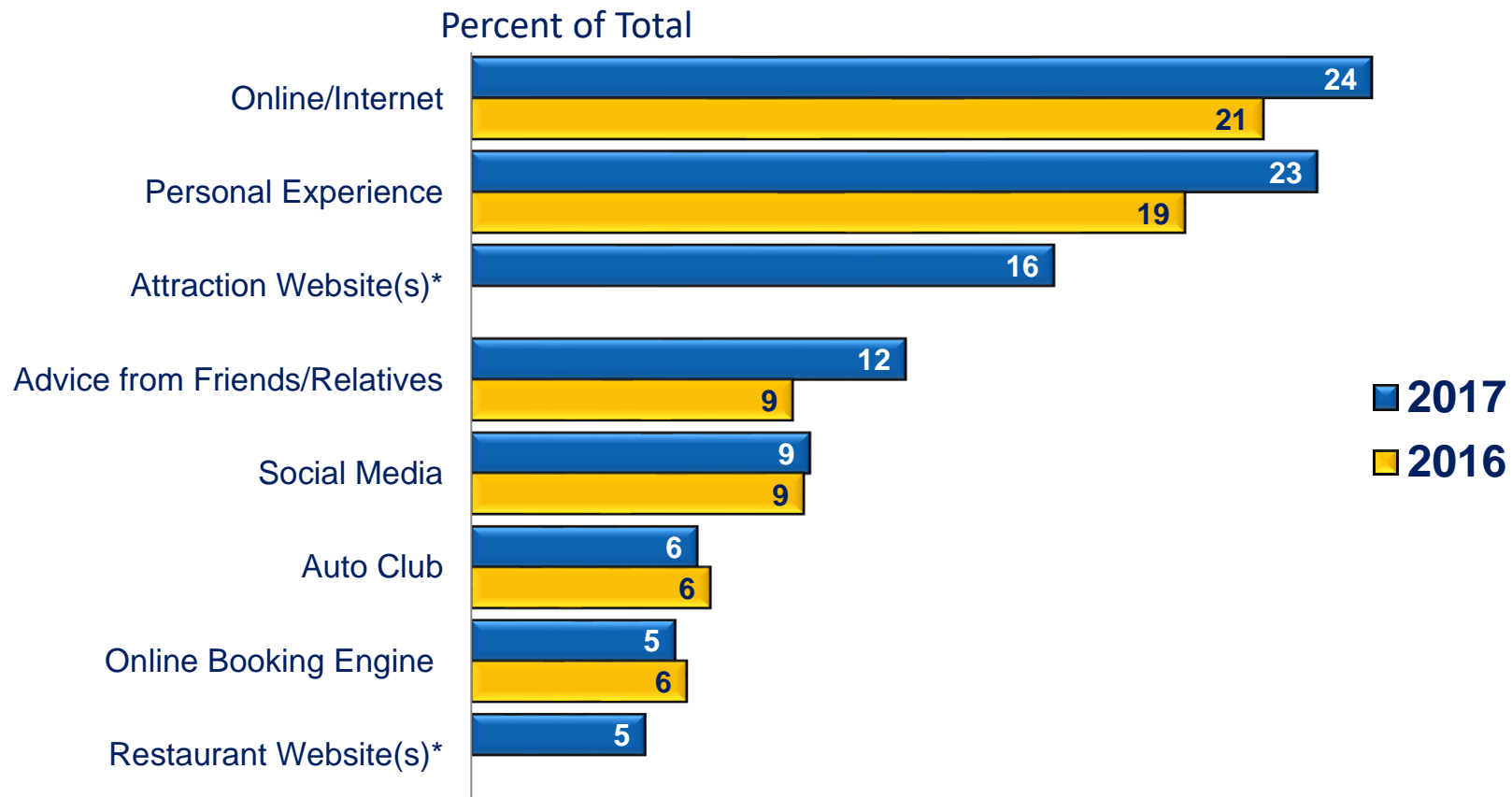
Percent of Total



# Information Sources Used for Planning Pennsylvania Day-Trip



Base: Marketable Day-Trips



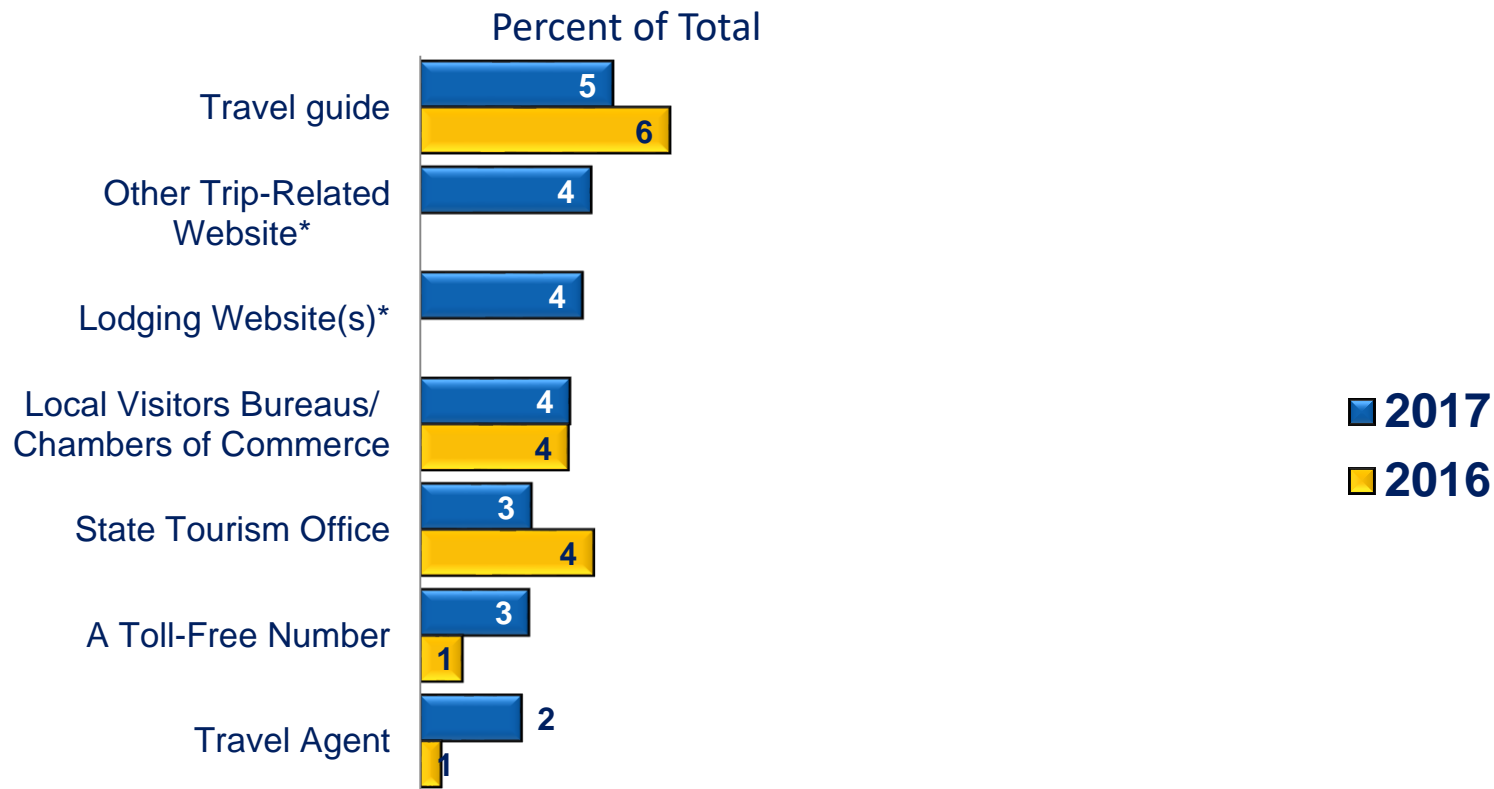
\*Category added in 2017.



# Information Sources Used for Planning Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

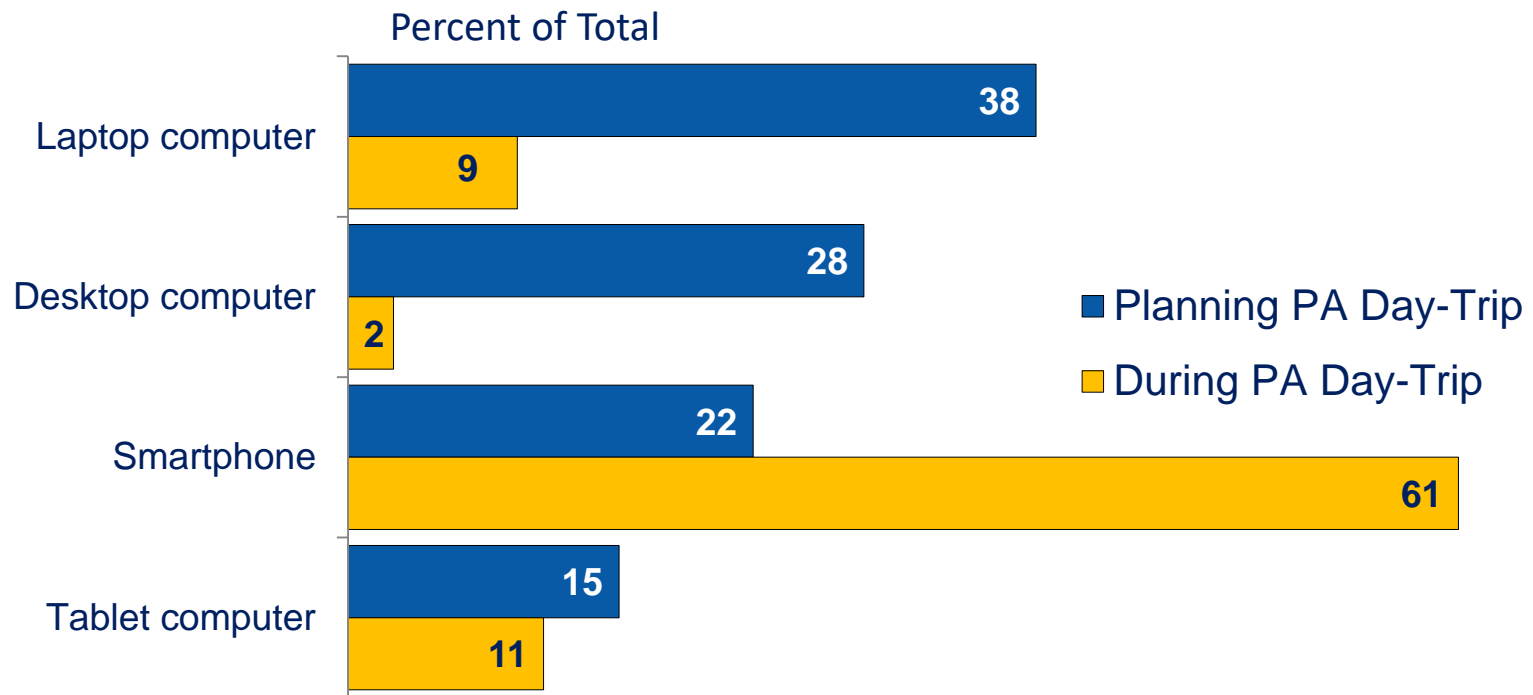


\*Category added in 2017.

# Technology Used by Travelers in Planning and During 2017 Pennsylvania Day-Trip



Base: Marketable Day-Trips

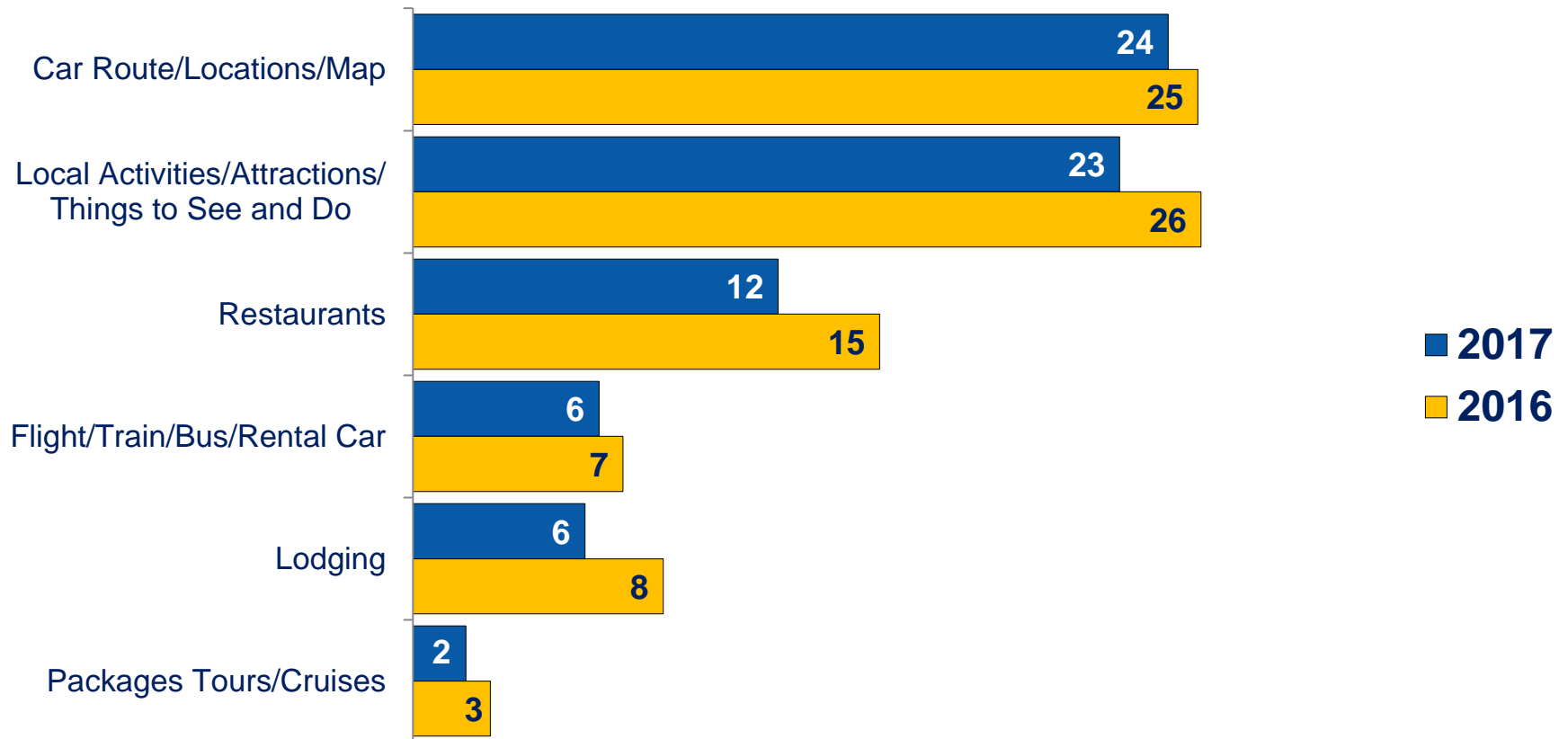


# Trip Elements Planned Using Internet



Base: Marketable Day-Trips

Percent of Total

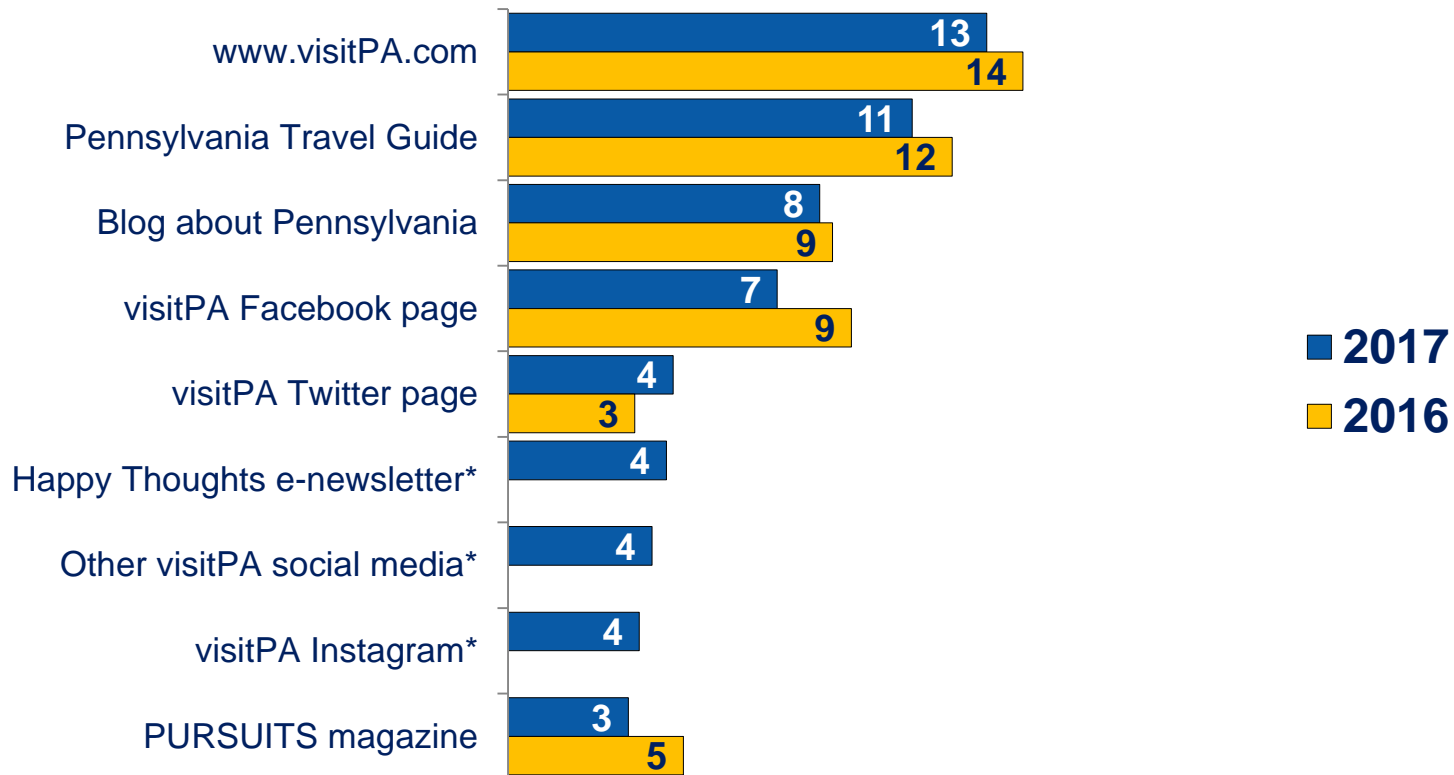


# Use of Pennsylvania Trip Planning Tools



Base: Marketable Day-Trips

Percent of Total



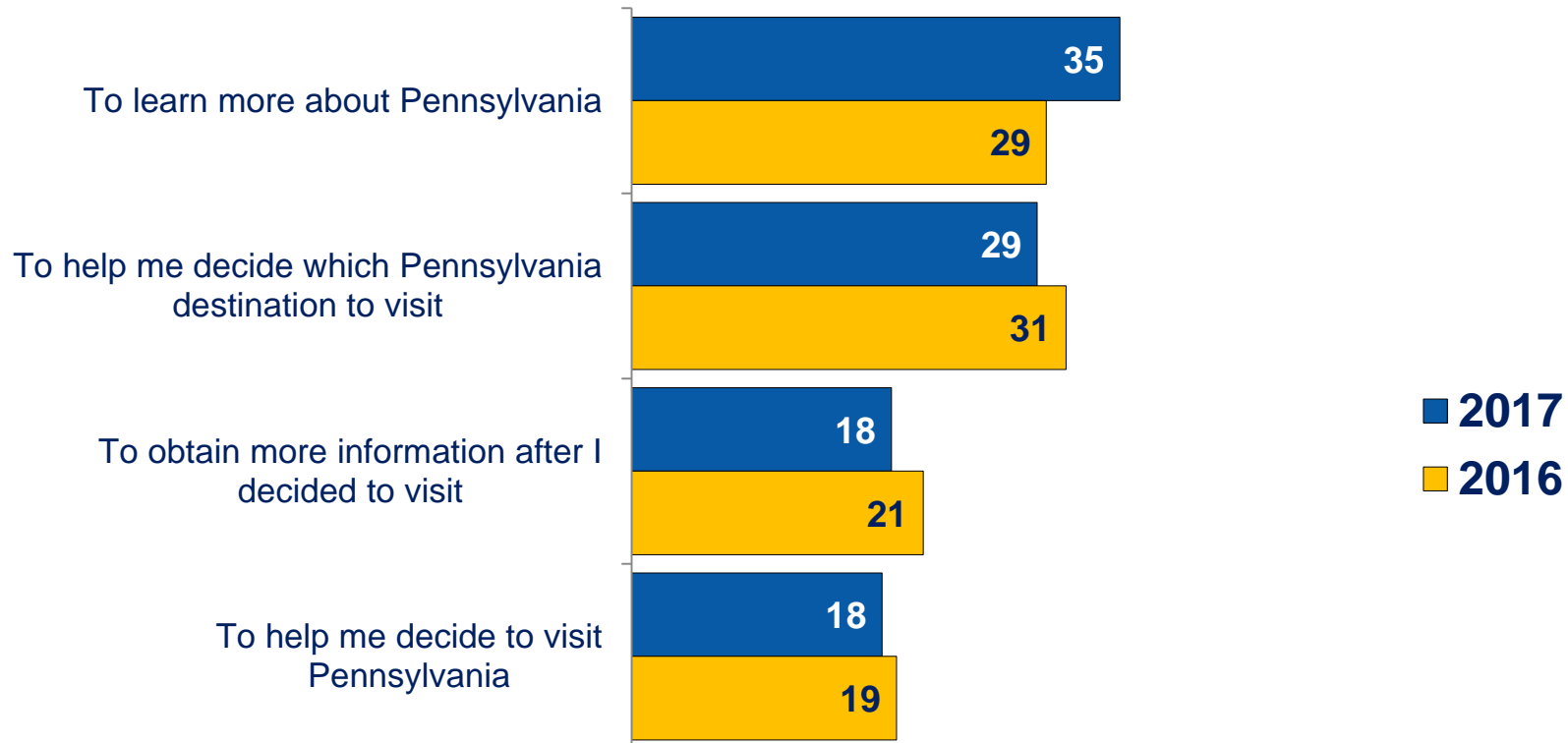
\*Category added in 2017.

# Reasons for Using *www.visitPA.com*



Base: Marketable Day-Trips

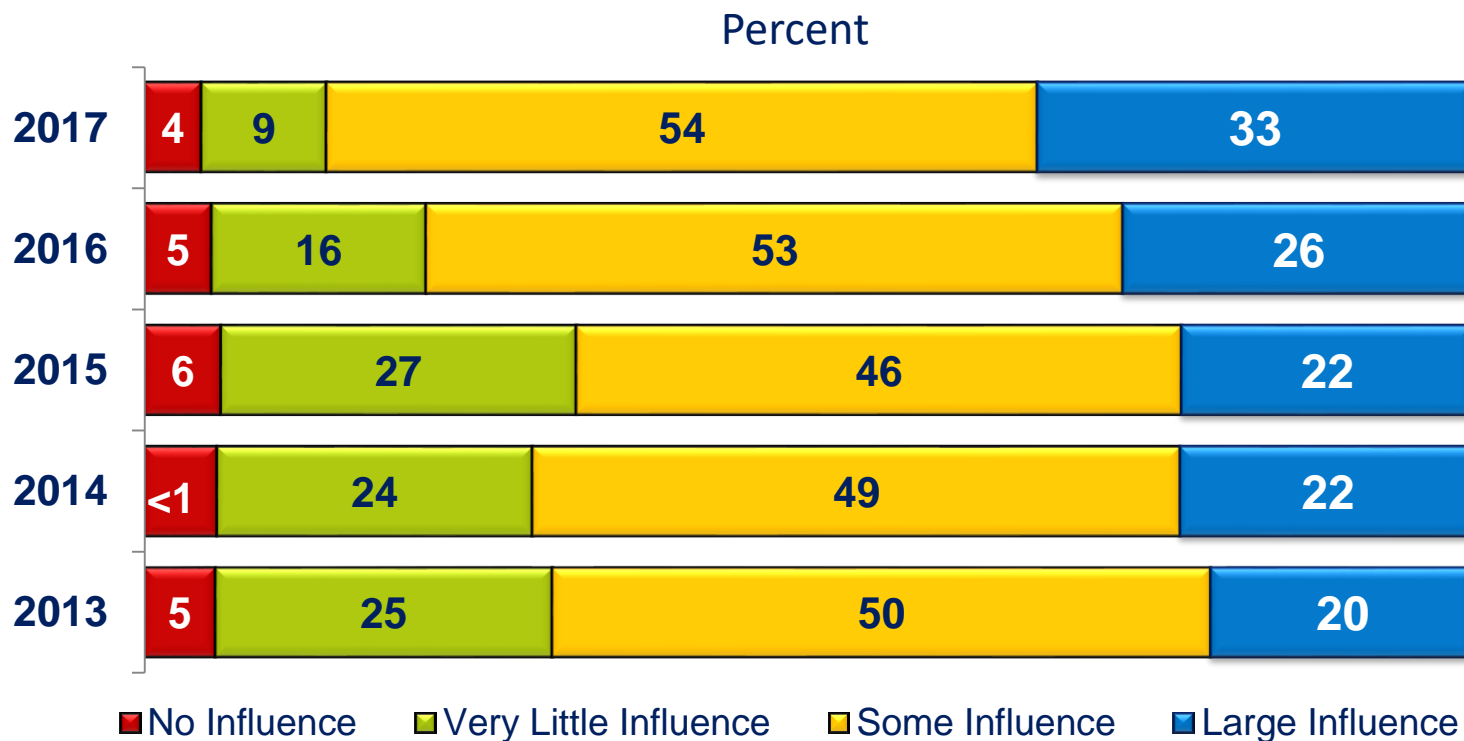
Percent of Total



# *www.visitPA.com* Influence on Planning Pennsylvania Day-Trip



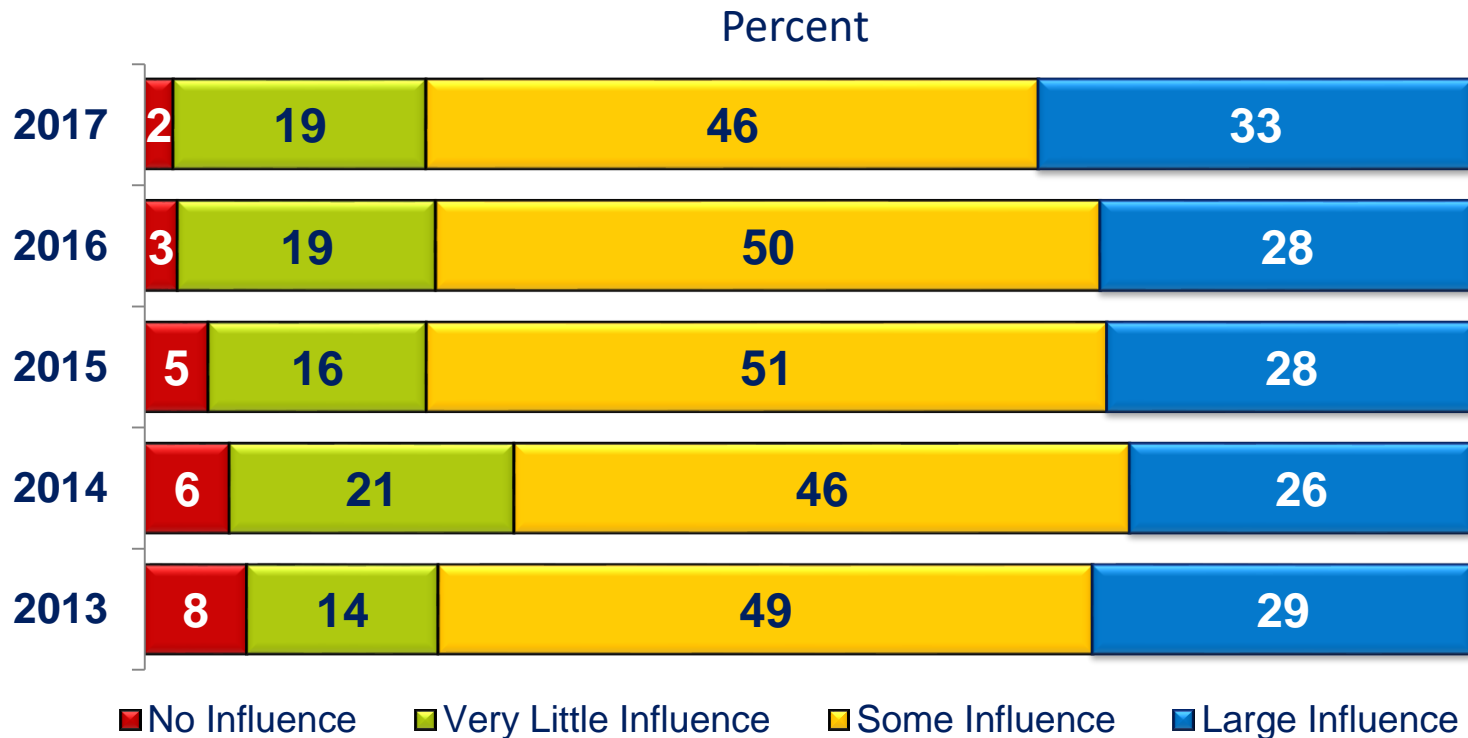
Base: Marketable Day-Trips



# *www.visitPA.com* Influence on Visiting Pennsylvania for a Day-Trip



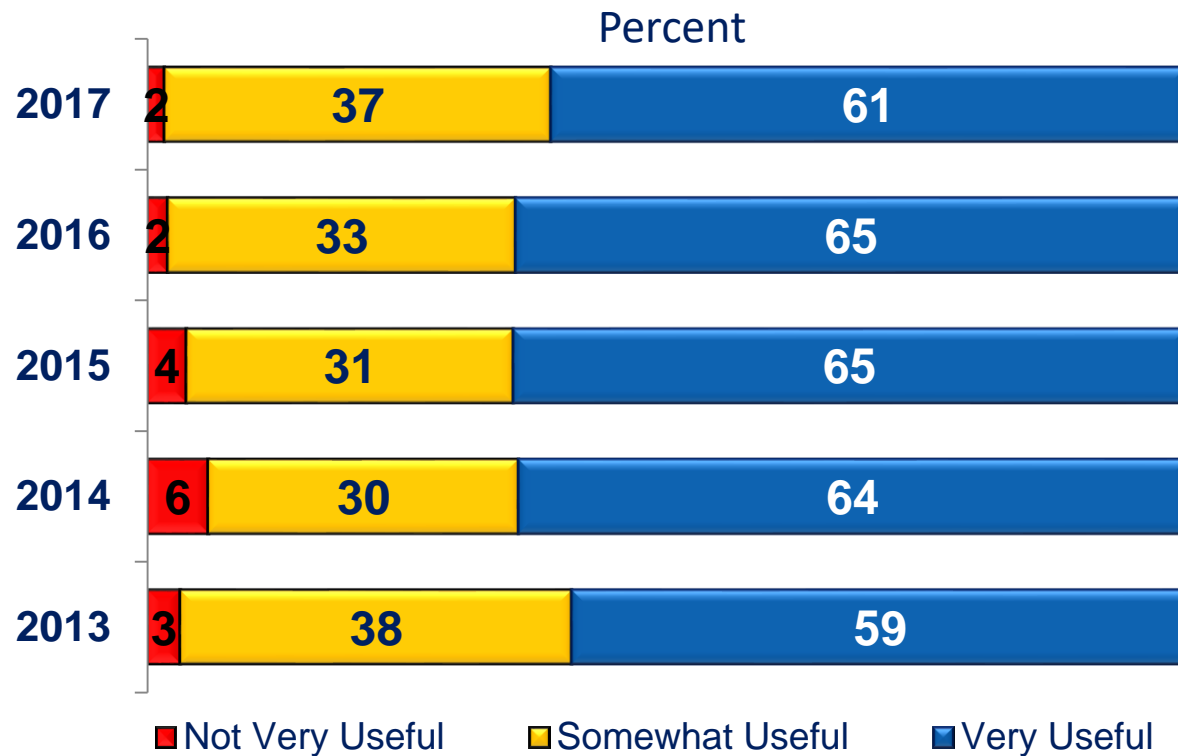
Base: Marketable Day-Trips



# Usefulness of Pennsylvania Travel Guide in Planning Pennsylvania Day-Trip



Base: Marketable Day-Trips



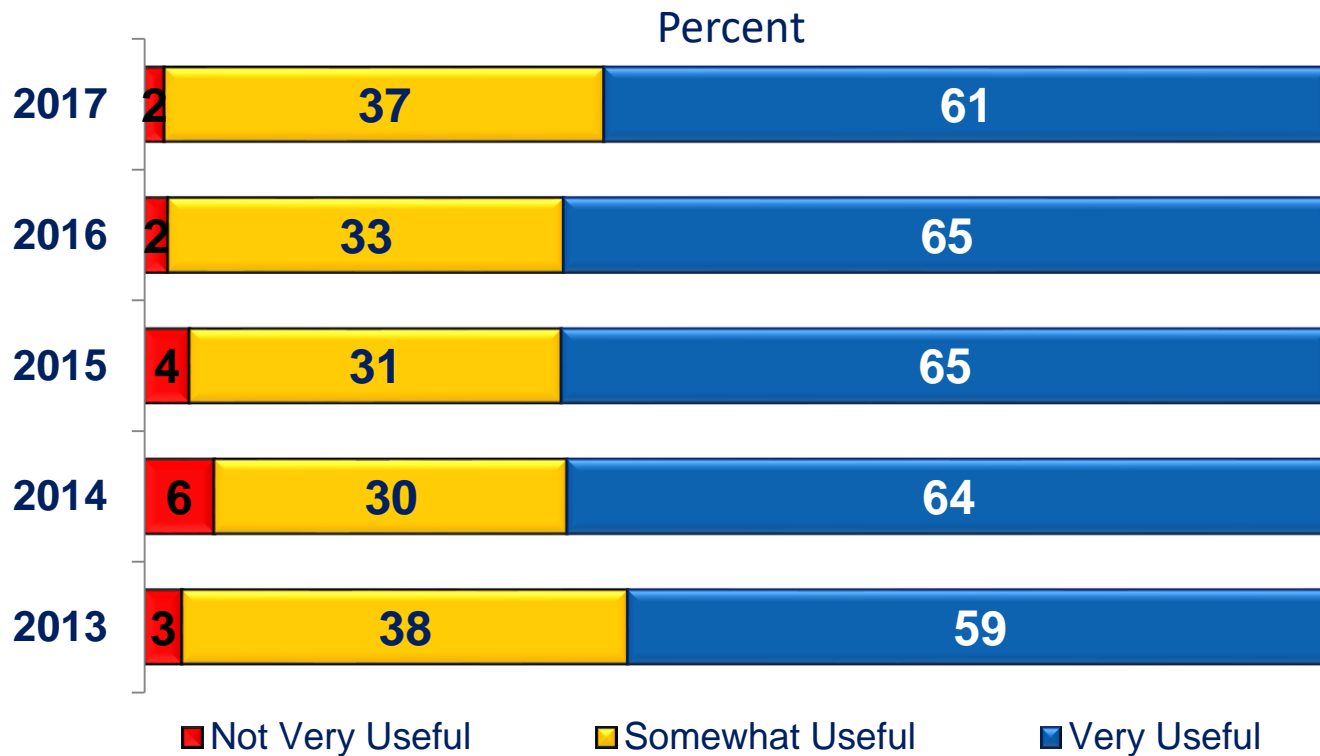
Note: Small Sample Size



# Use of Vacation Packages and Group Travel



Base: Marketable Day-Trips

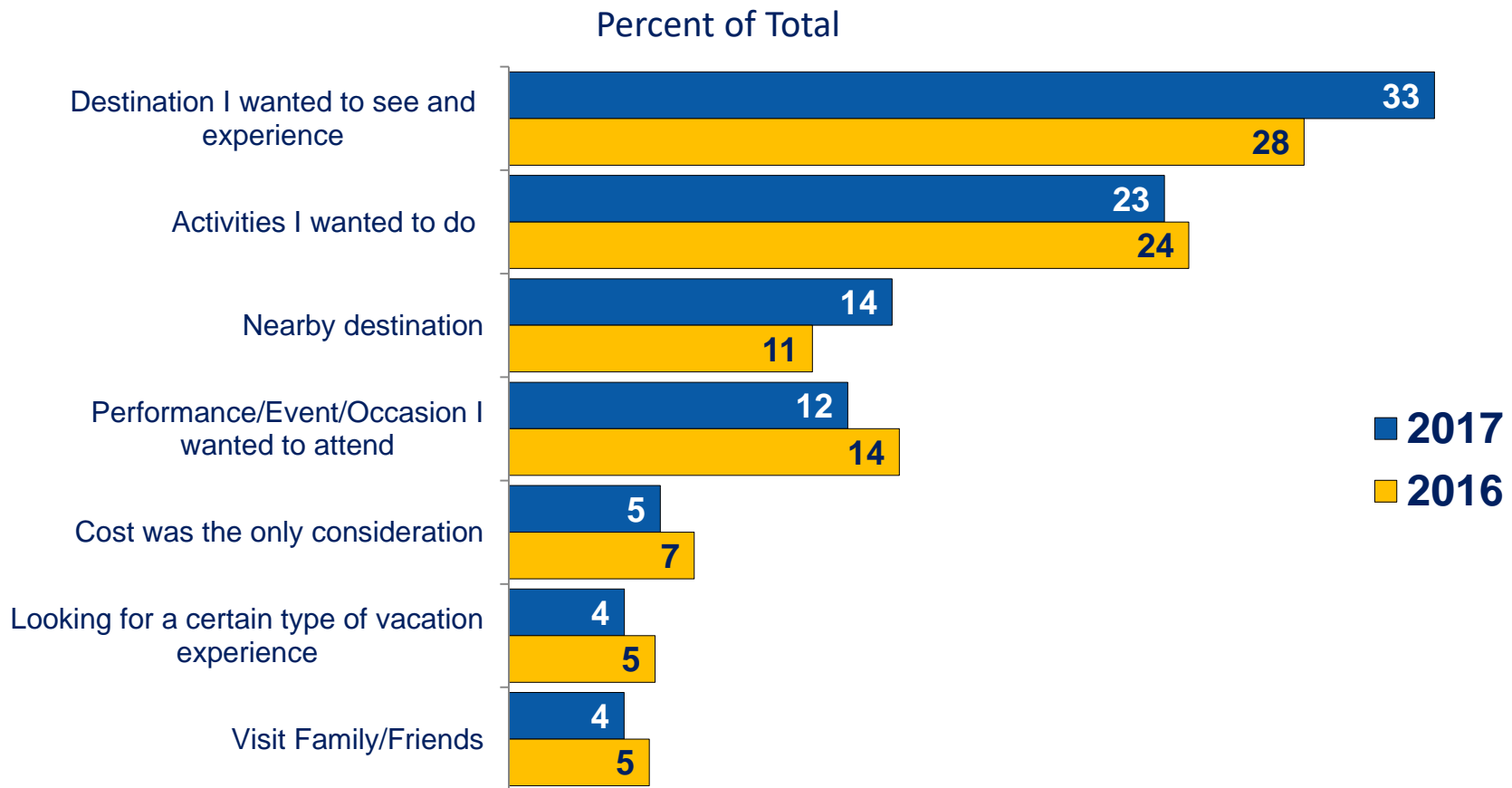


Note: Small Sample Size

# Planning Considerations Beyond Cost for Pennsylvania Day-Trip



Base: Marketable Day-Trips

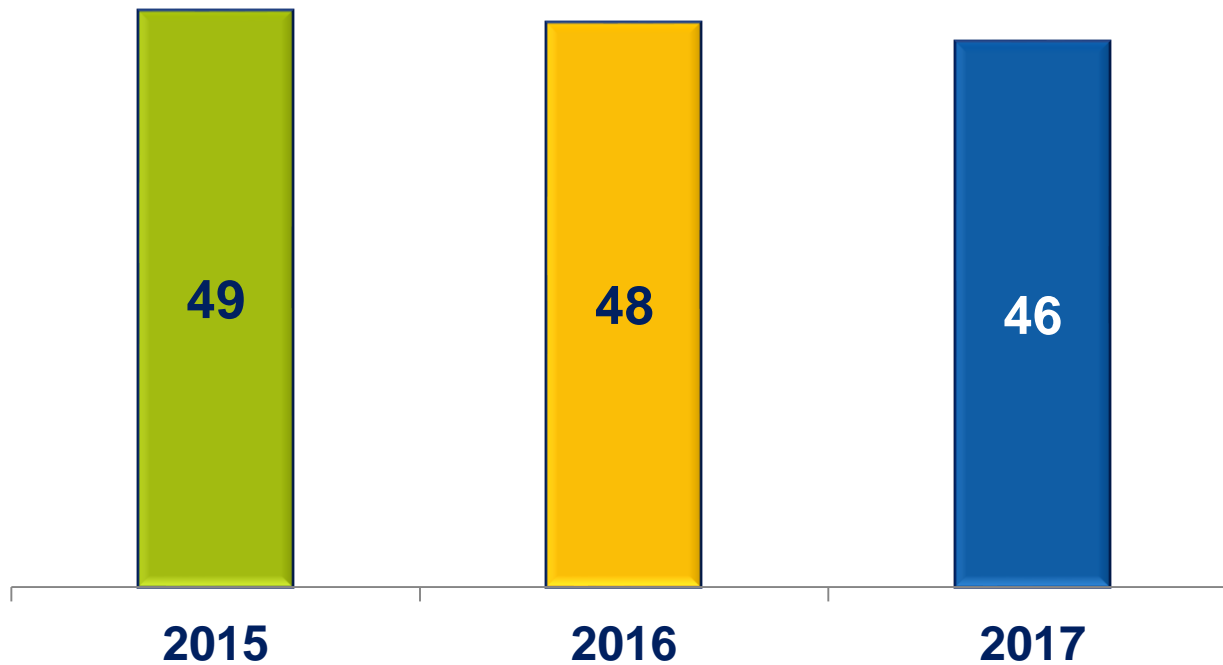


# Percent Who Booked In Advance



Base: Marketable Day-Trips

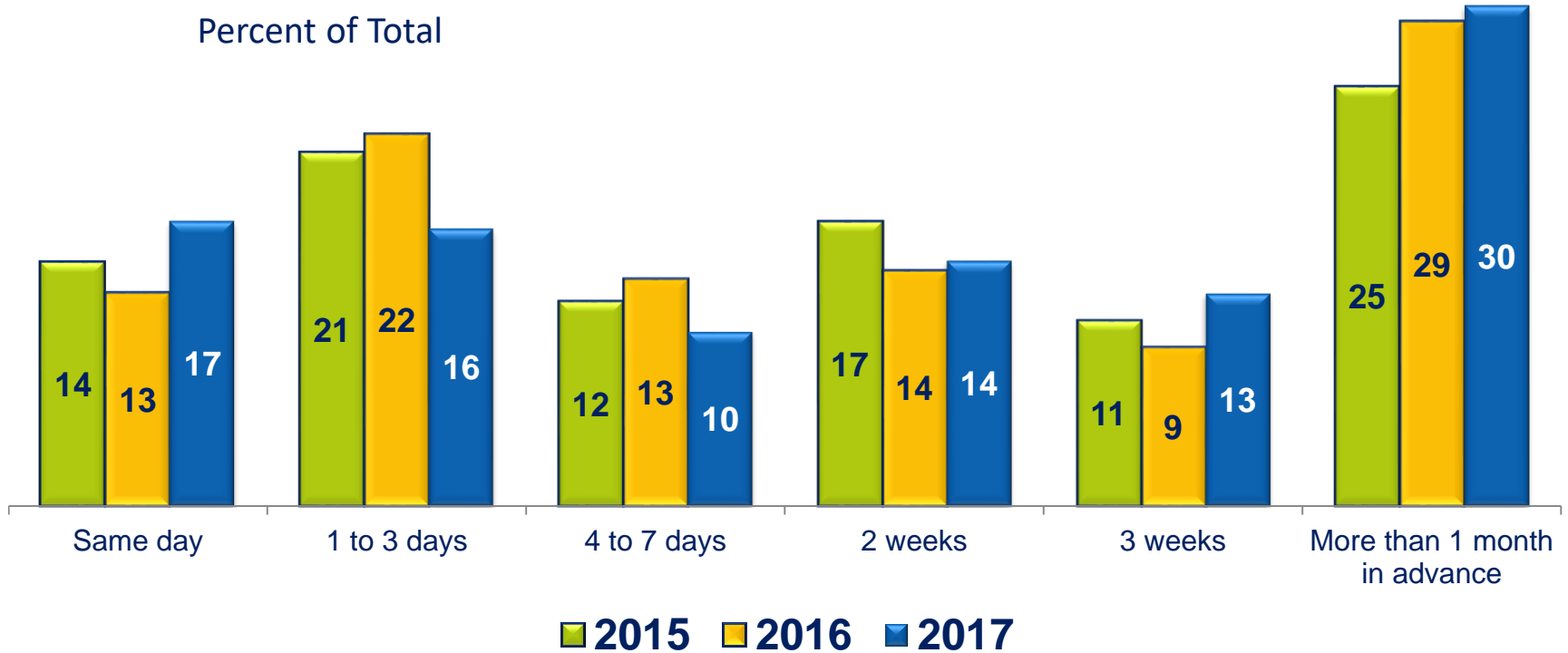
Percent of Total



# Booking Cycle



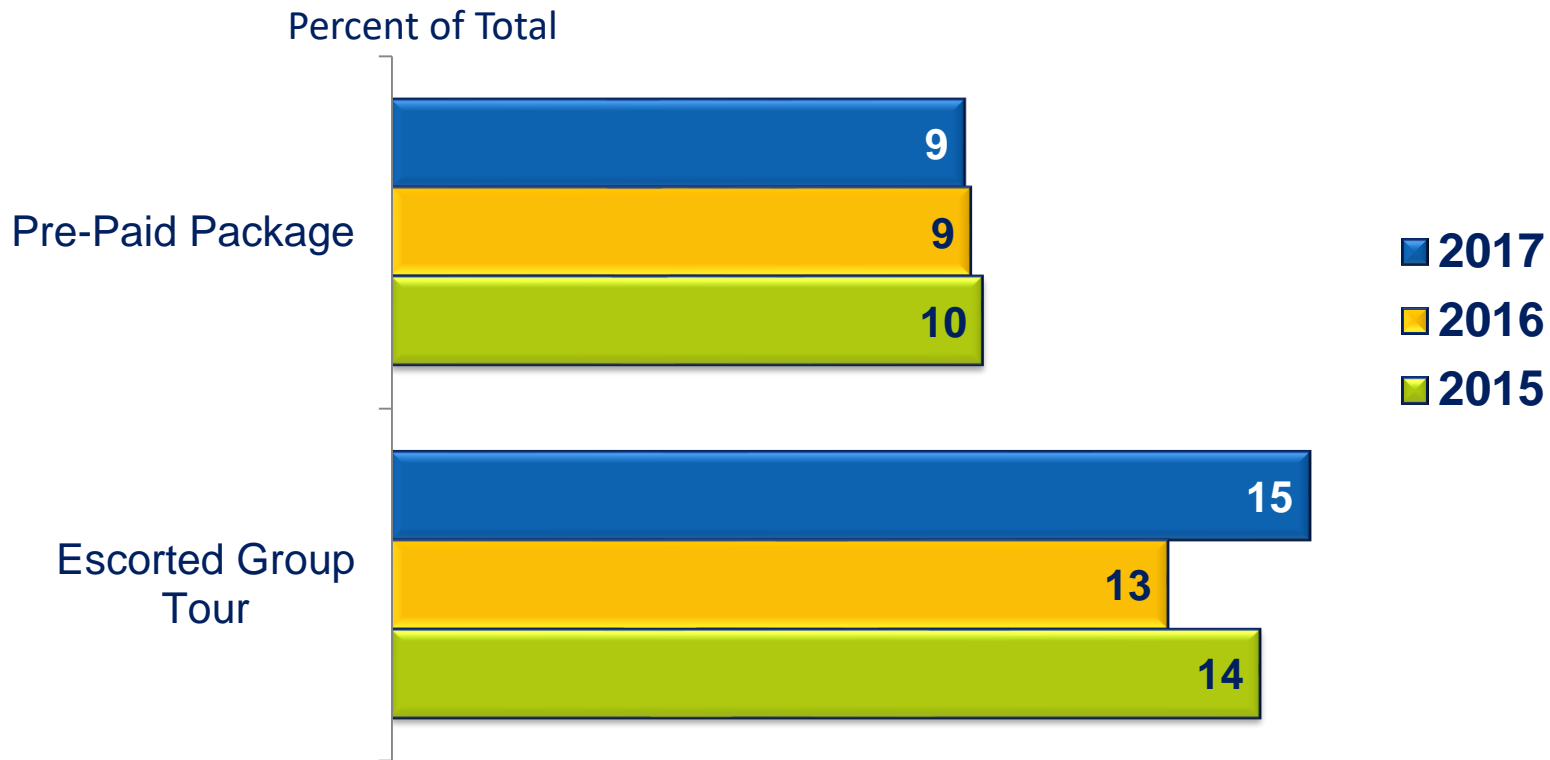
Base: Marketable Day-Trips Booked in Advance



# Use of Vacation Packages and Group Travel for PA Day-Trip



Base: Marketable Day-Trips

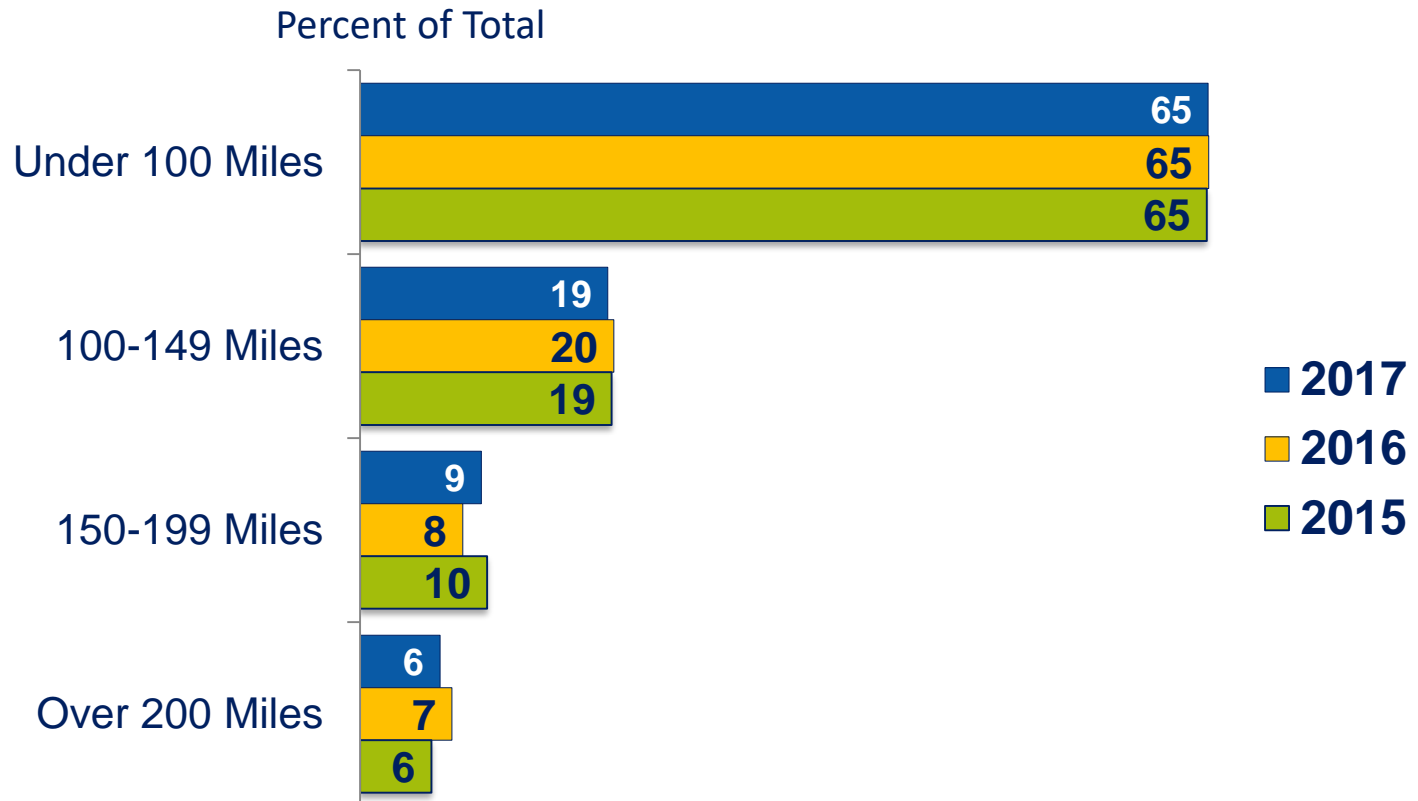


# **2017 Marketable Day-Trip Characteristics**

# Distance Traveled for Pennsylvania Day-Trip



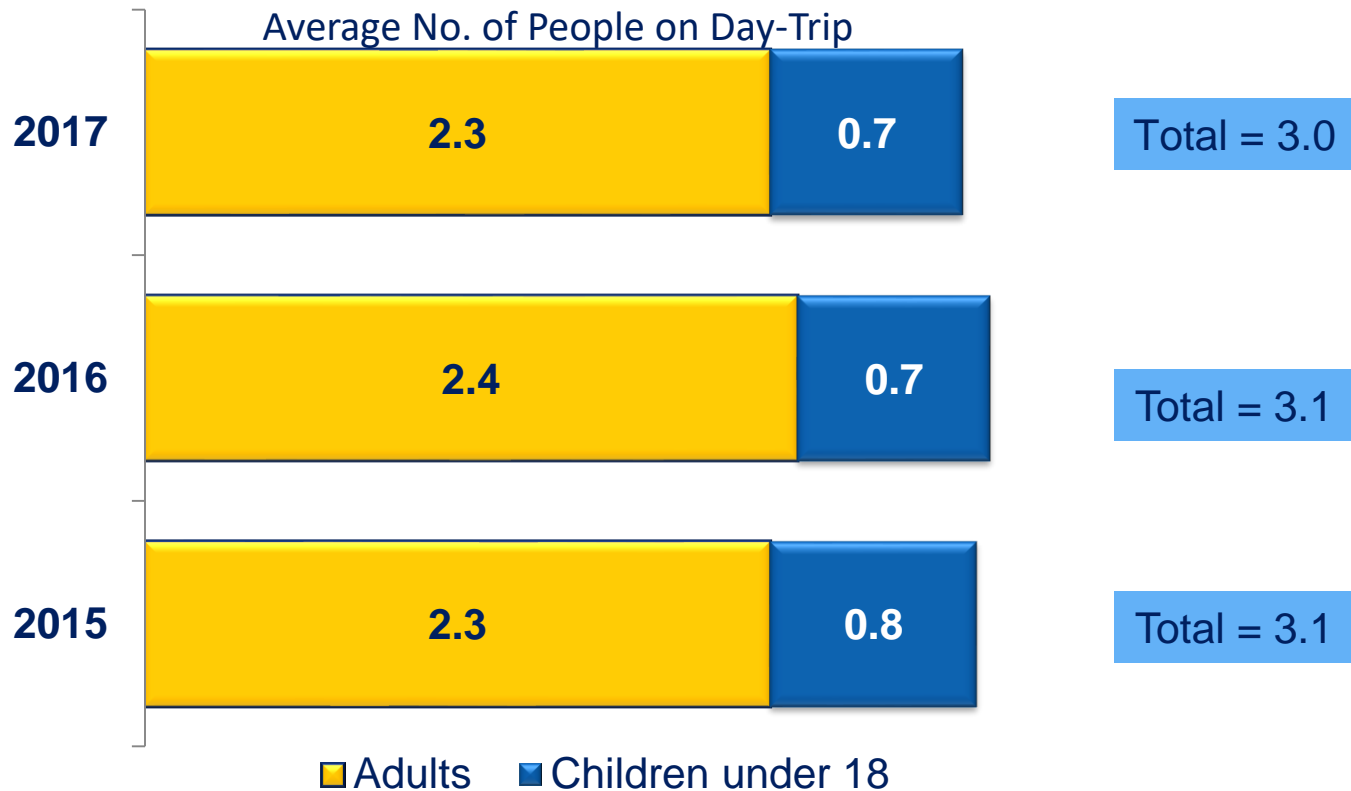
Base: Marketable Day-Trips



# Average Size of Travel Party on Pennsylvania Day-Trip



Base: Marketable Day-Trips

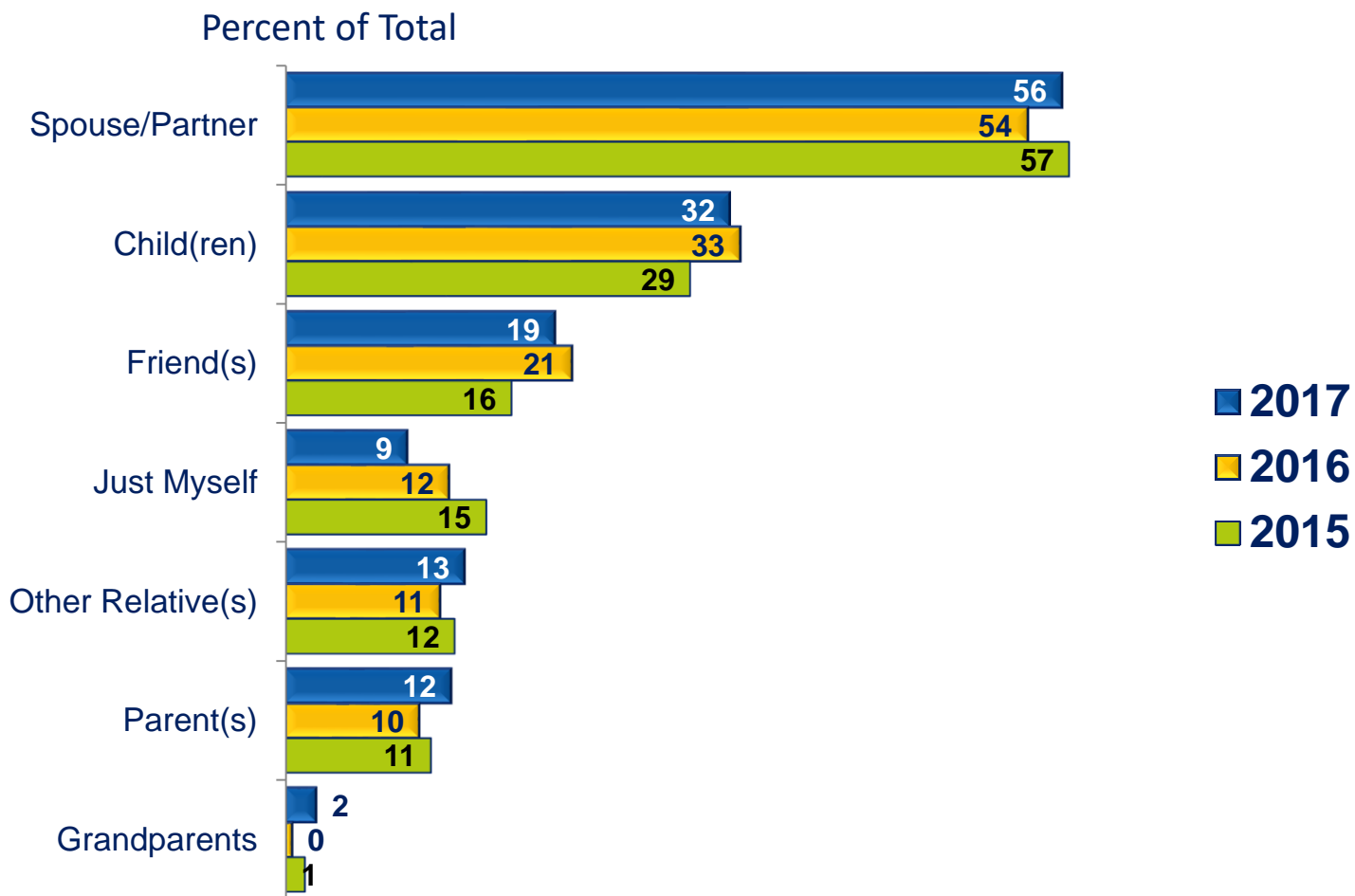




# Composition of Travel Party on Pennsylvania Day-Trip



Base: Marketable Day-Trips

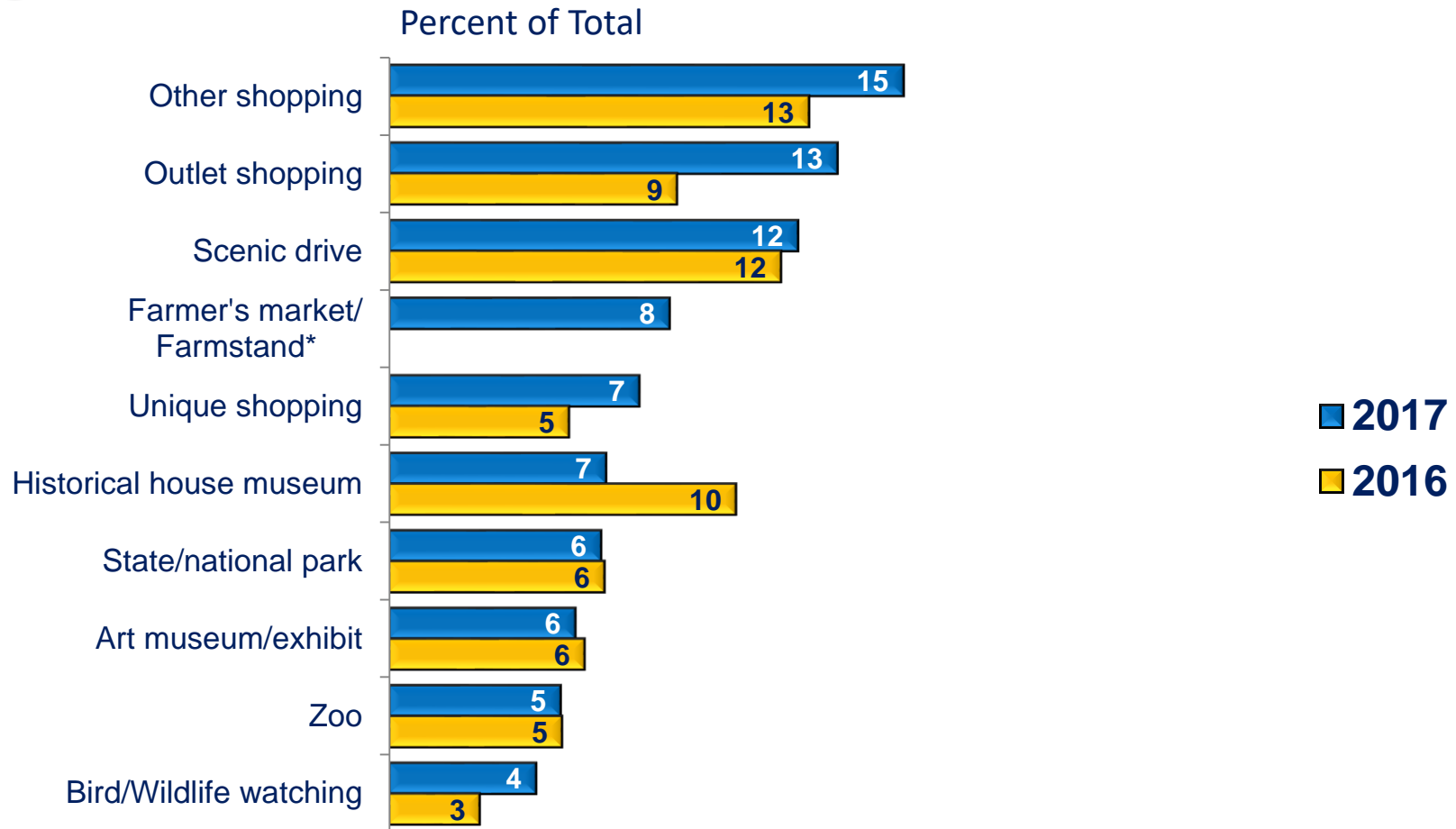


# **Trip Experiences — 2017 Marketable Day-Trips**

# Things Seen and Experienced on Pennsylvania Day-Trip



Base: Marketable Day-Trips

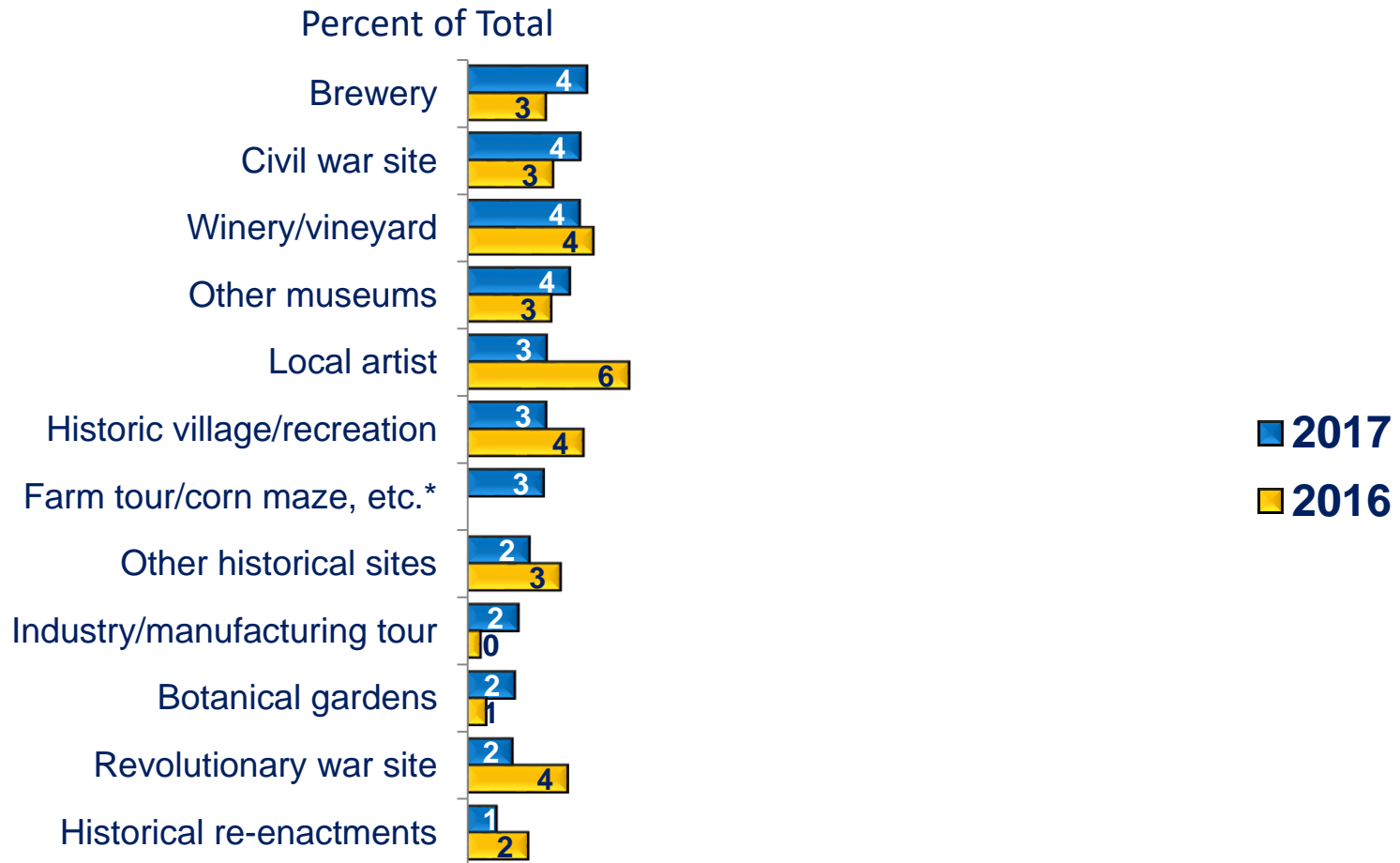


\*Category added in 2017.

# Things Seen and Experienced on Pennsylvania Day-Trip (cont'd)



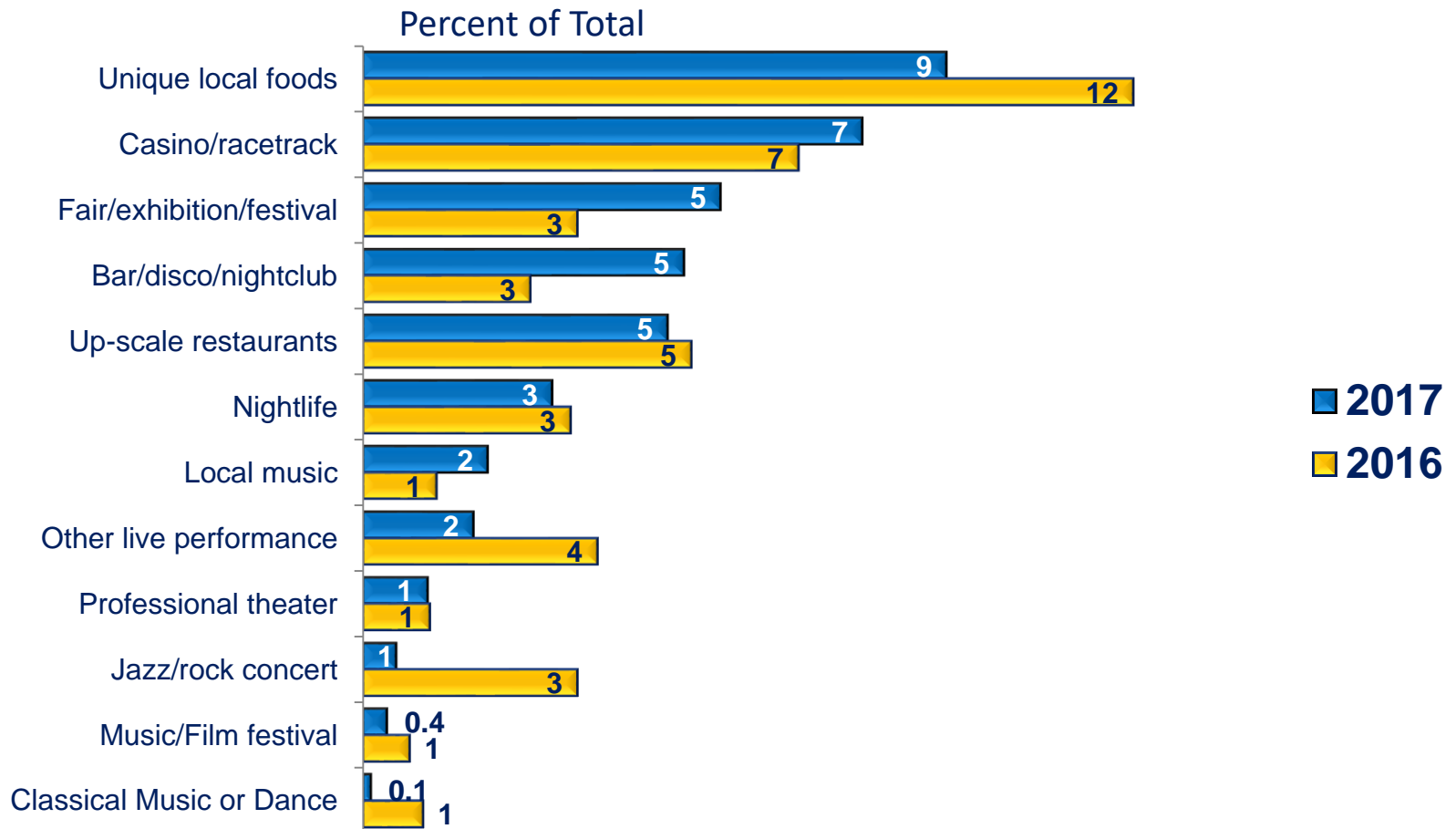
Base: Marketable Day-Trips



# Dining/Entertainment



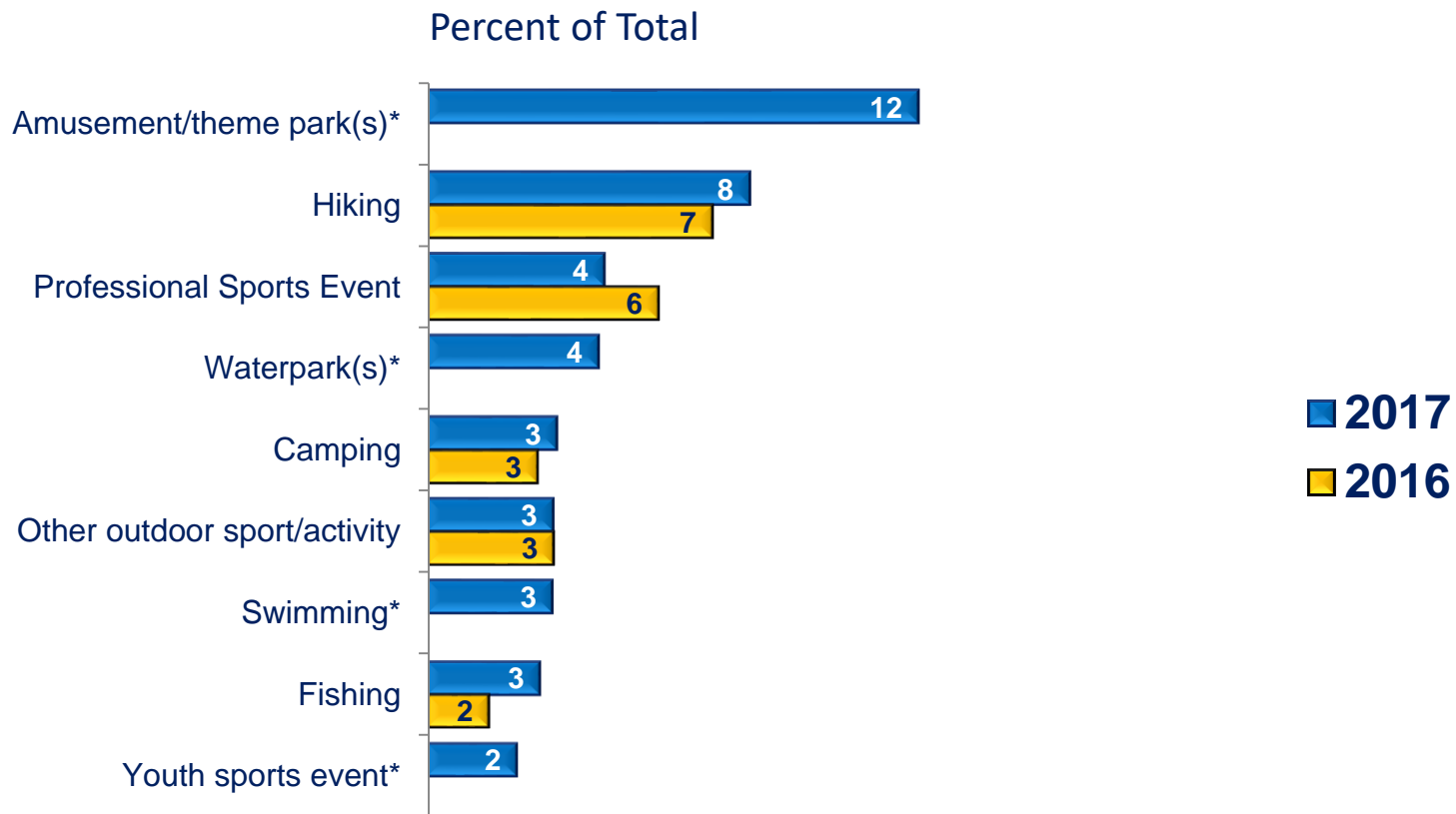
Base: Marketable Day-Trips



# Sports and Recreation



Base: Marketable Day-Trips



\* Category added in 2017.

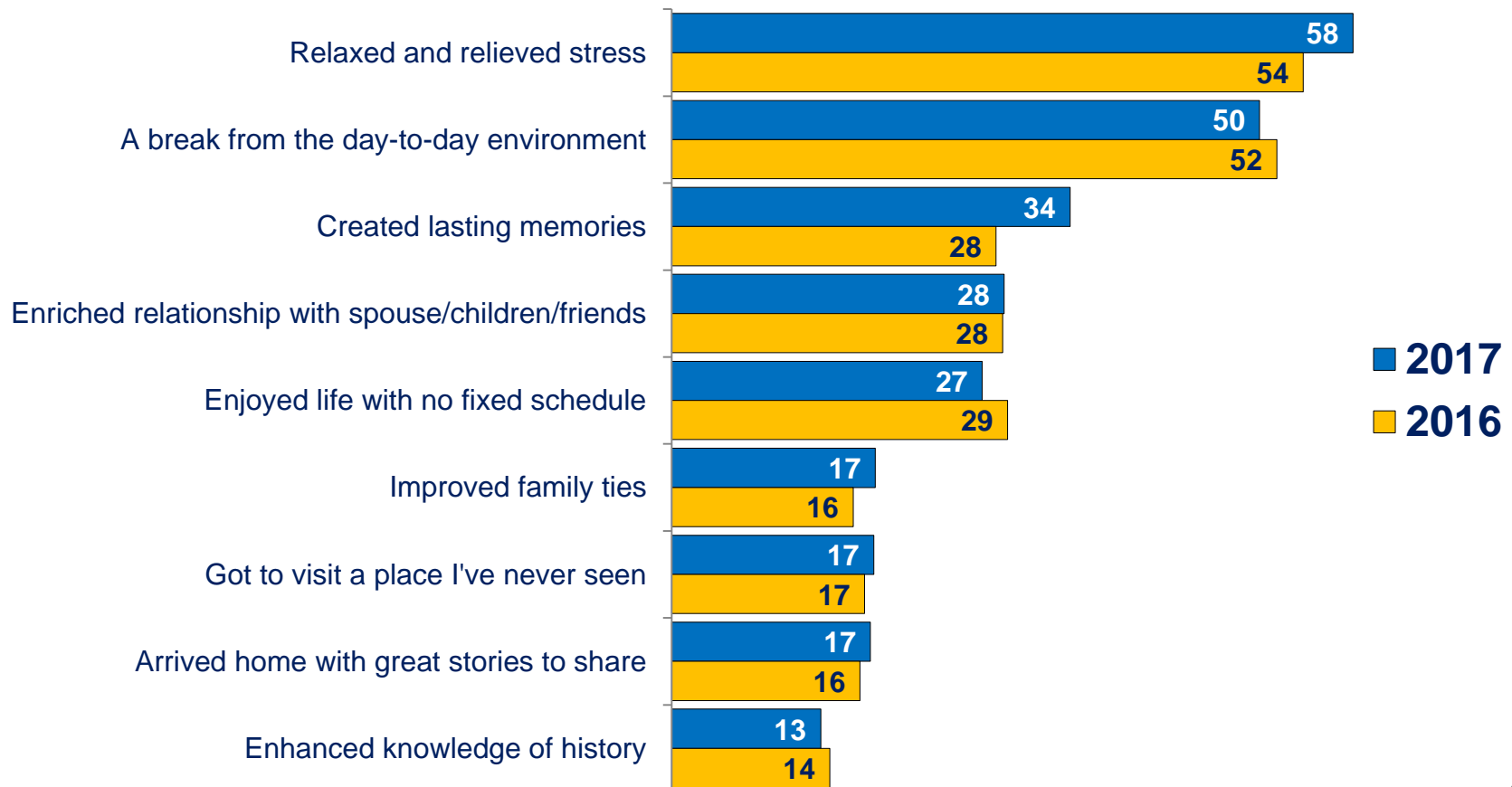
# **Trip Benefits — 2017 Marketable Day-Trips**

# Benefits From Pennsylvania Day-Trip



Base: Marketable Day-Trips

Percent of Total





# Benefits From Pennsylvania Day-Trip (cont'd)



Base: Marketable Day-Trips

