

Pennsylvania Heritage Tourism Study

Researched and prepared by D.K. Shifflet and Associates, Ltd. for The Pennsylvania Department of Conservation and Natural Resources in Partnership with the Pennsylvania Department of Community and Economic Development, the Pennsylvania Historical and Museum Commission, Preservation Pennsylvania, and the Federation of Museums & Historical Organizations, 1999

Purpose: The main purpose of this report was to provide the Department with market intelligence on Pennsylvania's Heritage Tourism industry and then compare the findings to those of the outdoor recreation survey that was conducted for the same year, 1997.

Location: D.K Shifflet and Associates, Ltd. focused on the state of Pennsylvania while conducting the research for this report.

Study Design: In order to obtain the information necessary for this report, D.K. Shifflet and Associates, Ltd. used surveys to gather data.

Key Findings:

- In 1997, Heritage Tourism by dedicated or Core Heritage travelers (i.e. visitors whose primary purpose for traveling to Pennsylvania was for Heritage Tourism), accounted for 12% of all Pennsylvania Leisure Person-Trips or 10.3 million visitors (2)
- The Core Heritage market segment helped support over 55,000 jobs, was responsible for generating \$1.0 billion in earnings for Pennsylvania residents, and generated \$497.1 million in tax collections for Pennsylvania (direct and indirect impacts) (2).
- Compared to the spending estimates of Pennsylvania's Core Heritage travelers in 1996, Heritage travelers' spending in 1997 soared 15%, growing from \$2.60 billion to \$2.99 billion (11).
- Direct and indirect impacts of tourism in PA generated (13):
 - \$1.00 billion in tourism expenditures
 - 55,092 jobs
 - \$497.1 million in taxes
- Results revealed that Pennsylvania's Heritage Tourism participation level by Leisure travelers was significantly higher than any other state examined. In fact, its participation rate of 46% was more than twice that of the next most popular market, Washington DC, which had a 23% participation rate. (16)
- In contrast to Pennsylvania's total Leisure travel and outdoor recreation markets, which typically reach their peak in the summer months, the busiest travel time for Pennsylvania's Core Heritage travelers is during the fall (31, 40).
- Results of the survey revealed that there was a great deal of crossover between Heritage and Outdoor Recreation Tourism. 58% of the state's Core Heritage Travelers indicated that they also participated in Outdoor Recreational activities on their most recent Heritage trip to Pennsylvania (34).
- Total expenditures (food/drink, transportation, accommodations, etc.) for PA travelers (in millions) (39):
 - Total Pa leisure = \$72.6
 - Core Heritage = \$101.9
 - Outdoor Recreation = \$58.1
- Heritage travelers tended to be slightly older and more affluent than outdoor recreation travelers. In addition, Heritage travelers more often traveled as families or in groups of 3 or more adults, tended to spend more money, and more often visited Pennsylvania during the fall rather than summer months (44).