

The Economic Impact of Pennsylvania Heritage Areas

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EXECUTIVE SUMMARY



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Executive Summary

Topline

Tourists spent an estimated 7.5 million days/nights in the 12 Pennsylvania Heritage Areas (HAs) in 2014, purchasing \$2 billion worth of goods and services. Including secondary effects, the total contribution of heritage visitor spending to the state economy was 25,708 jobs and \$798 million in labor income.

Overview

This report summarizes the results of qualitative and quantitative research conducted in five HAs that were studied by the research team. The report also provides an overall estimate of the economic impact of heritage-related visitation to all 12 HAs.

Extensive qualitative research was conducted with stakeholders of each of the five study HAs to help understand key challenges and issues. A comprehensive quantitative survey was also administered within the five study HAs from May through December, 2014. A total of 3,524 usable questionnaires were collected. Visitors completed the survey via paper and online questionnaires. This survey provided beneficial demographic and visitor information for the research in addition to necessary estimates on purchases such as lodging, food, and attractions.

Findings

The research indicates that the five study HAs contribute positive economic benefits to their local geographic regions. The operations of each HA and the visitation attributed to HA attractions are detailed in the analysis in two ways:

- 1) HA organizational expenditures and the work of HA staff facilitate economic development projects in their regions. This involvement increases the economic impact

within each local region. This also enhances the economic value of HAs as they may utilize technical expertise to promote economic development with partners. For example, the five HAs documented specific examples of economic development success, including more than 151 new tourism-related businesses that have started operations in the past 5-10 years. These businesses provide evidence that the HAs play a role in their areas that yields beneficial economic and social returns.

2) Heritage visitation to a local region was defined and attributed to each HA and its partners. Heritage-specific visitors were quantified via the research survey when respondents indicated that a visit to a heritage attraction or event was indeed the primary reason for their visit. Heritage visitation provides substantial economic benefits for the local geographic region. Highlights of the economic impact of heritage-defined visitation in each of five study HA areas are detailed below in Table A:

Table A
**2014 Heritage-Defined Visitor
Economic Impact of 5 Study Heritage Areas**

2014 Spending Impact					
	Heritage Areas				
	Allegheny Ridge	Lincoln Highway	National Road	Route 6	Susquehanna Gateway
Non-Local or Overnight Visitors					
Visitors (# of Party days/nights)	344,903	1,034,486	626,045	4,336,559	209,535
Heritage Visitor Spending (000's)	\$65,606	258,873	151,750	1,056,641	62,251
Direct Effect					
Jobs	564	2,603	1,667	9,641	568
Labor Income (000's)	\$14,164	\$53,628	\$30,318	\$216,916	\$12,117
Value Added (GDP) (000's)	\$19,534	\$82,316	\$48,862	\$318,603	\$195,01
Output (000's)	\$33,386	\$147,854	\$90,403	\$558,669	\$34,326
Total Effect					
Jobs	699	3,260	2,050	12,271	735
Labor Income (000's)	\$20,914	\$78,396	\$45,873	\$316,157	\$19,152
Value Added (GDP) (000's)	\$31,137	\$126,814	\$75,890	\$499,413	\$32,470
Output (000's)	\$52,300	\$225,530	\$137,340	\$891,101	\$56,282

Source: Survey of visitors to 5 study HAs, 2014; 3,524 total respondents

As an example, the shaded area in Table A above illustrates the economic impact on one select HA from this study, Allegheny Ridge. Specifically, visitors spent an estimated 344,903 party days/nights in the HA, spending nearly \$66 million in 2014. Further, direct heritage-defined visitor spending supported 564 jobs within Allegheny Ridge. Adding secondary effects, the total jobs supported were 699. Jobs include full and part time jobs, consistent with employment estimates of the Bureau of Labor Statistics. Similarly, Table A illustrates findings for labor income, value added (GDP), and total output (sales). For example, labor income is measured as income which includes wages and salaries, payroll benefits, and income of sole proprietors. The spending of heritage-defined visitors in 2014 directly affected Allegheny Ridge salaries and small business owner income by \$14 million, which increased to nearly \$21 million when including secondary multiplier effects.

Allegheny Ridge direct heritage-visitation spending contributed nearly \$20 million to its regional GDP. Including the secondary multiplier effects, the contribution increases to more than \$31 million. GDP or value added includes labor income as well as profits and rents and indirect business taxes. Value added is the preferred measure of the contribution of an activity or industry to gross regional product as it measures the value added by that activity/industry net of the costs of all non-labor inputs to production.

Output represents the value of industry production or sales. For example manufacturers would define output as sales plus/minus change in inventory. The output of service sector production is equal to its sales. Output in the retail trade sector are only the retail margins on retail sales and therefore exclude the cost of goods sold. Allegheny Ridge direct heritage-visitation spending contributed more than \$33 million to

the regional output. Including the secondary multiplier effects, the economic benefit increases to more than \$52 million.

The intangible economic benefits detailed in the qualitative findings include sustaining the culture and heritage of an area, as well as partnering with tourism promotion agencies (TPAs) to attract tourist dollars. HAs also work with local Chambers of Commerce to attract businesses and promote economic development in rural areas of Pennsylvania.

In addition to the five study HAs, the research team also used visitation estimates provided by all 12 Pennsylvania HAs to develop an estimate of heritage-visitation economic effect on jobs, income, and value added statewide, as noted in Table B:

Table B
**2014 Heritage-Defined Visitor
Economic Impact of all 12 Pennsylvania Heritage Areas**

Statewide Model - Visitor Spending Impact/Non-Residents	All 12 Heritage Areas Pennsylvania
Visitors (Party days/nights)	7,539,755
Heritage Visitor Spending (000's)	\$2,089,077
Direct Effect	
Jobs	19,333
Labor Income (000's)	\$477,881
Value Added (GDP) (000's)	\$709,062
Output (000's)	\$1,208,247
Total Effect	
Jobs	25,708
Labor Income (000's)	\$798,114
Value Added (GDP) (000's)	\$1,263,295
Output (000's)	\$2,147,091

Source: Survey data of visitors to 5 study heritage areas, 2014; 3,524 total respondents, extrapolated using visitation data from the remaining 7 non-study heritage areas

Based on this additional data, Table B above illustrates the economic impact on of all 12 HAs statewide. Specifically, visitor parties spent an estimated 7.5 million days/nights in the 12 HAs in 2014, spending an estimated \$2 billion. Further, the direct

impact of heritage-visitor spending to the state economy was 19,333 jobs and \$477.9 million in labor income. Including secondary effects, the total contribution of visitor spending to the state economy was 25,708 jobs, \$798 million in labor income, and nearly \$1.3 billion in value added effects. By comparison, a recent research report on the total Pennsylvania travel and tourism-related economic activity supported 478,888 jobs in total (direct and indirect jobs) in PA in 2013. The state's travel and tourism sector was directly responsible for an estimated \$15.3 billion of the state's 2013 Gross Domestic Product (GDP) (Tourism Economics, 2014). By comparison, this report estimates 2014 HA visitation was directly responsible for \$709 million.

Based on the visitors sampled at the five study HAs, approximately 70% of visitor spending and associated economic effects would be lost to the regions in the absence of specific heritage anchor attractions. The importance of these individual attractions is underlined by a finding of the quantitative research indicating low awareness of the concept of a "heritage area" as well as the existence of the overall HA Program. The data indicates that 67% of respondents were *not aware* of the PA program, and that a majority of respondents were *not aware* of each individual HA—with the exception of Lincoln Highway, where 60% of respondents indicated that they were aware of the HA.

This research suggests that the HA program, although a component of the larger statewide tourism industry, supports a substantial number of jobs across the state particularly within the restaurant, amusement, and retail industries, despite limited awareness of the specific HA program. To frame this impact, including direct and indirect effects, heritage tourism supported more than 25,000 jobs in 2014, more than the population of the city of Johnstown of 20,978 (U.S. Census, 2010).

Heritage defined visitors were responsible for more than \$158.7 million in state and local tax revenues in 2014. State and local tax revenue includes employee contributions, household taxes (income, real estate, etc.) and corporate profit taxes.

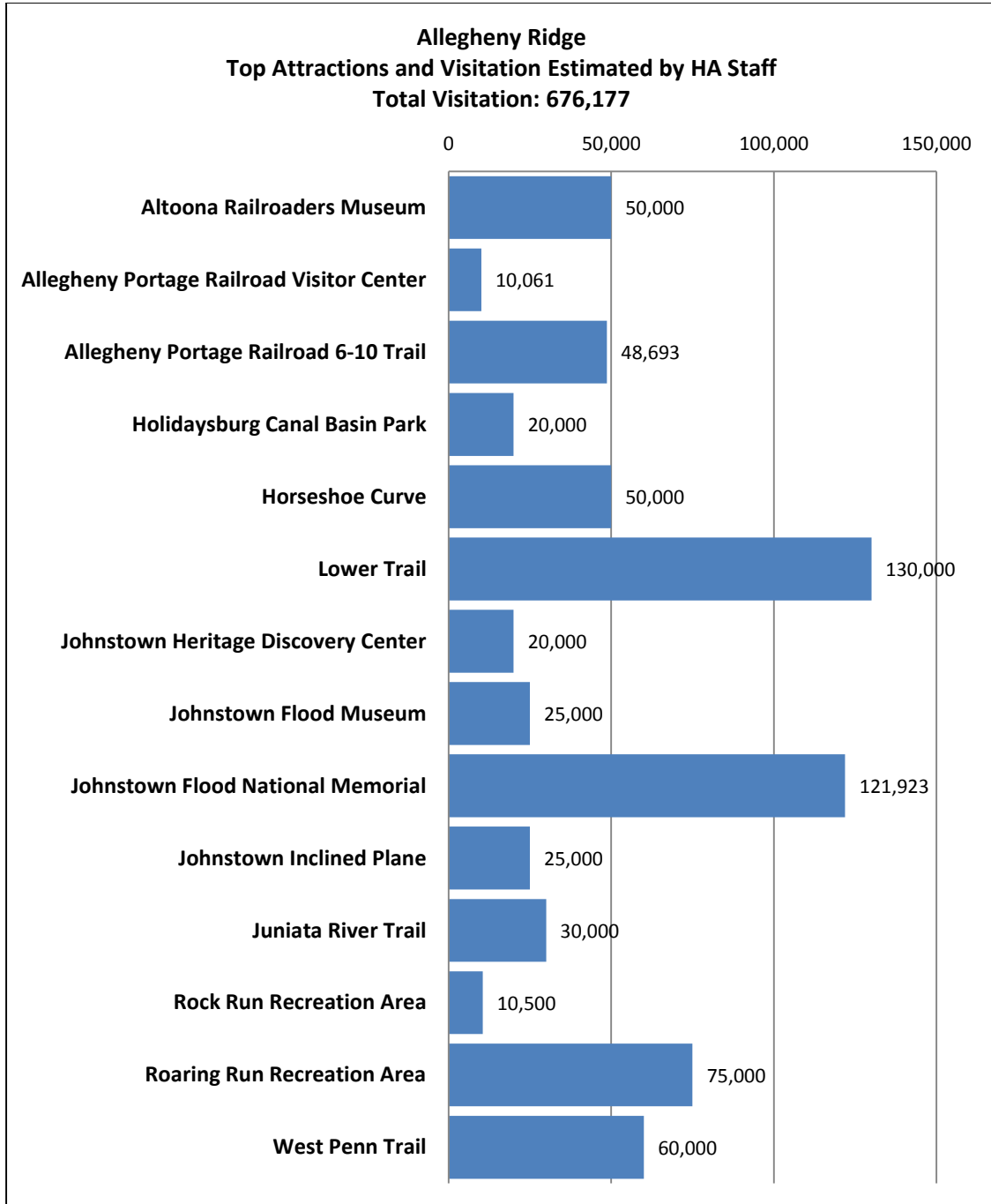
The operations of HAs provide nominal economic benefits for their local region through salaries, grants and special projects; however, the administration of grant revenue from Federal, State, or local funding agencies results in a significant effect on the regional income and value added multipliers.

Recommendations

Based on the findings of the qualitative and quantitative research, this report recommends nine actions to improve aspects of the HA program. These include a summit meeting between HA staffs and key DCNR leaders to develop a statewide roadmap for the future of the HA program, the adoption of a common visitor survey procedure for all HAs based on the methods used in this study, suggested refinements to the DCNR partnership grants program and enhancements to the mini grants program, consideration of a more marketable name for the program, and ways of improving relationships with local partners and stakeholders. The report also recommends enhancements to the ways HAs help preserve a sense of place within their regions and new efforts to encourage nature tourism. Finally, the report recommends ways to enhance the effectiveness of each specific HA.

Appendix F

Allegheny Ridge Heritage Area Detailed Information



Source: HA staff

Allegheny Ridge Results: Visitor Breakout		
Visitor Type		
	Frequency	Percent
Local Day Visitor (less than 60 miles)	123	24%
Non Local Day Visitor (60 miles or more)	31	6%
Overnight visitor, Motel	107	21%
Overnight visitor, Other	255	49%
Total	516	100%
Pennsylvania or Out-of State Visitors		
	Frequency	Percent
Pennsylvania residents	424	81%
Out of state visitors	100	19%
Total	524	100%
Travel Party Size		
	Frequency	Mean
How many adults are in your travel party?	428	2.24
How many youths are in your travel party (under 18)?	163	2.34
Reason for Visit		
	Frequency	Percent
I live here	196	37%
Visiting friends	91	17%
See heritage sites	157	30%
Outdoors	49	9%
Passing through	36	7%
	529	100%

Source: Survey of visitors to Allegheny Ridge HA, 2014; 524 total respondents

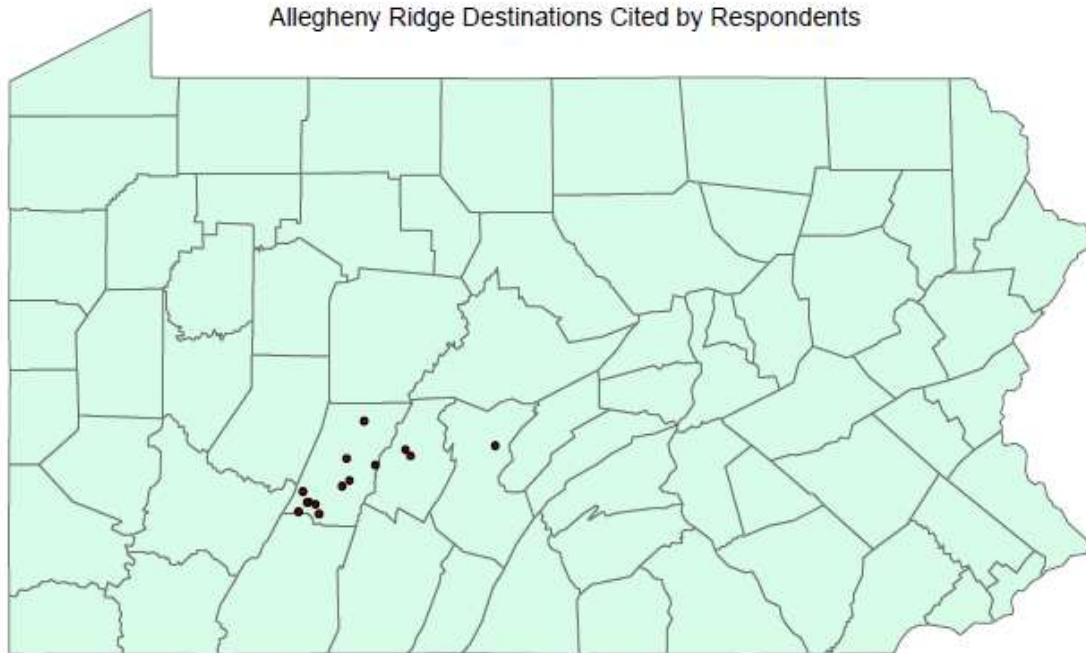
Allegheny Ridge Top 30 Attractions Cited by Respondents

	Attraction	Frequency	Percent
1	Horseshoe Curve	121	12.0%
2	Inclined Plane	88	8.7%
3	Altoona Railroaders Museum	87	8.6%
4	X Fest	62	6.1%
5	Johnstown Flood Museum	58	5.7%
6	Staple Bend Tunnel	44	4.3%
7	Prince Gallitzin Apple Cider Fest	42	4.2%
8	Johnstown	36	3.6%
9	Allegheny Portage Railroad	33	3.3%
10	Flood City Music Festival	30	3.0%
11	Hartslog Day	30	3.0%
12	Johnstown Flood Memorial	27	2.7%
13	6 to 10 Trail	25	2.5%
14	Flight 93 Memorial	18	1.8%
15	Johnstown Heritage Discovery Center	18	1.8%
16	Altoona	16	1.6%
17	Gallitzin Tunnels Museum	12	1.2%
18	Canoe Creek State Park	9	0.9%
19	Ghost Town Trail	9	0.9%
20	Lemmon House	9	0.9%
21	War Memorial Arena	9	0.9%
22	Altoona Curve Baseball	8	0.8%
23	Potatofest	8	0.8%
24	Prince Gallitzin State Park	8	0.8%
25	DelGrosso's Amusement Park	7	0.7%
26	Pittsburgh	7	0.7%
27	Penn State	6	0.6%
28	Boyer's Candy Factory	5	0.5%
29	Stonycreek River	5	0.5%
30	Asiago's Restaurant	4	0.4%

Source: Survey of visitors Allegheny Ridge HA, 2014; 524 total respondents

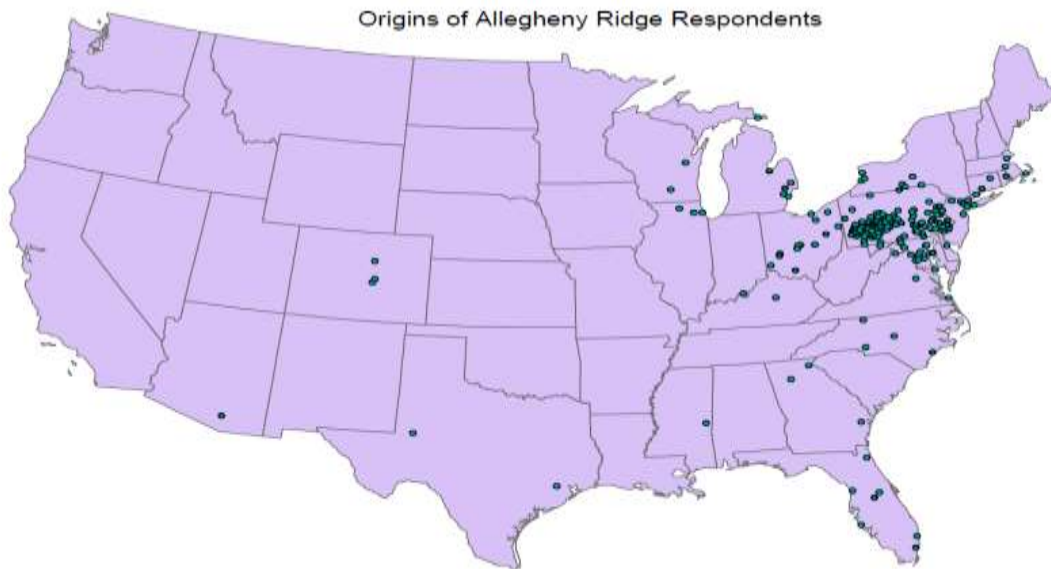
Allegheny Ridge Distribution of Visitation Sites and Visitor Home Locations

Respondents completed the survey at attractions located in 14 zip codes within the Allegheny Ridge Heritage Area, some of which overlap in the map below.



Source: Survey of visitors to Allegheny Ridge HA, 2014; 524 total respondents

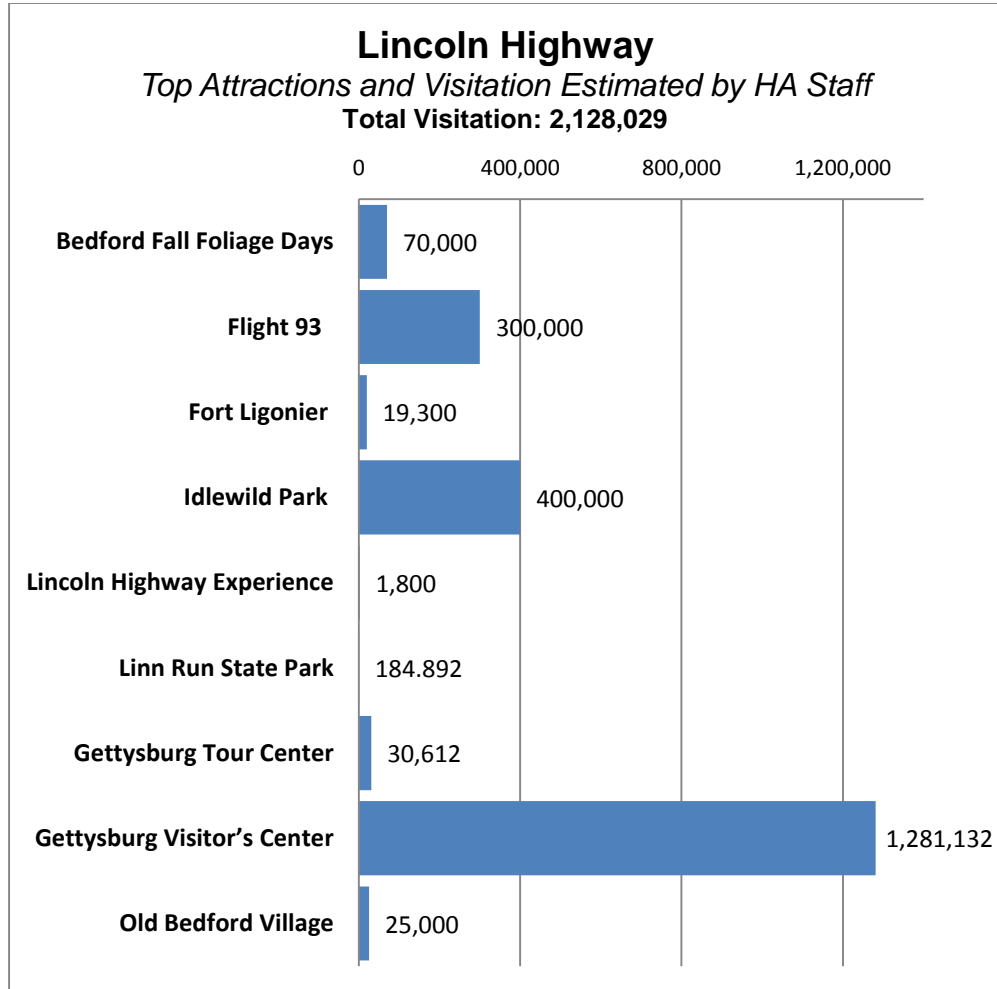
Respondents in the Allegheny Ridge Heritage Area came from 254 zip codes and 24 states in the U.S. (plus the District of Columbia) and three other nations (Canada, Spain, and Venezuela).



Source: Survey of visitors to Allegheny Ridge HA, 2014; 524 total respondents

Appendix G

Lincoln Highway Heritage Corridor Detailed Information



Source: HC staff

Lincoln Highway Results: Visitor Breakout

Visitor Type

	Frequency	Percent
Local Day Visitor (Less than 60 miles)	218	33%
Non Local Day Visitor (60 miles or more)	75	11%
Overnight visitor, Motel	174	27%
Overnight visitor, Other	189	29%
	656	100%

Pennsylvania or Out-of-State Visitors

	Frequency	Percent
Pennsylvania residents	500	75
Out of state visitors	168	25
Total	668	100

Travel Party Size

	Frequency	Mean
How many adults are in your travel party	558	2.28
How many youths are in your travel party (under 18)	191	2.98

Reason for Visit

	Frequency	Percentage
I live here	150	22%
Visiting friends	82	12%
See heritage sites	303	44%
Outdoors	104	15%
Passing through	47	7%
	686	100%

Source: Survey of visitors to Lincoln Highway HC, 2014; 668 total respondents

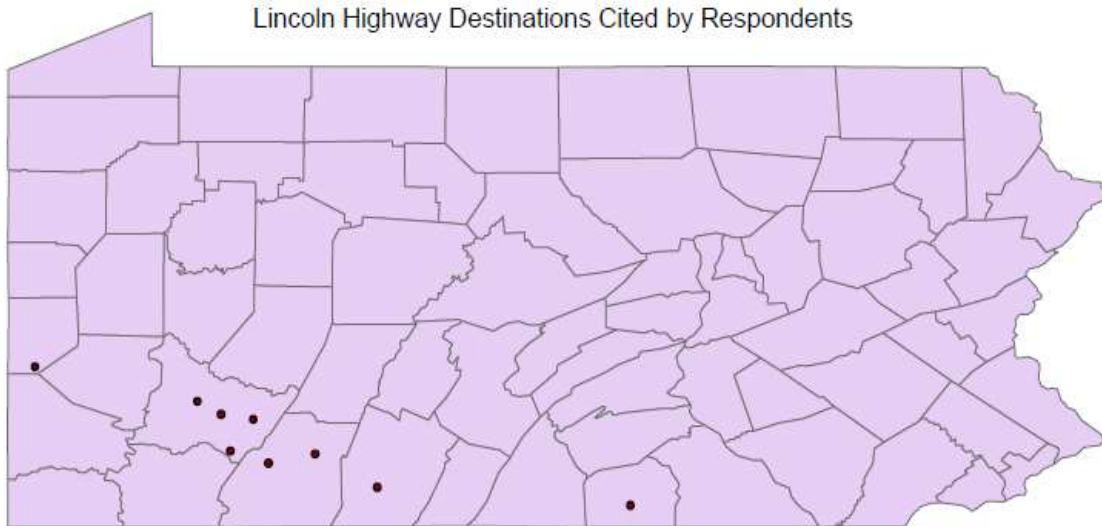
Lincoln Highway Top 30 Attractions Cited by Respondents

	Attraction	Frequency	Percent
1	Lincoln Highway Experience	183	14.2%
2	Lincoln Highway	100	7.7%
3	Fort Ligonier	79	6.1%
4	Flight 93 Memorial	75	5.8%
5	Bedford Fall Foliage Festival	71	5.5%
6	Ohiopyle	66	5.1%
7	Old Bedford Village	64	5.0%
8	Idlewild Park	59	4.6%
9	Gettysburg Battlefield	44	3.4%
10	Compass Inn	37	2.9%
11	Gettysburg Heritage Center	29	2.2%
12	Fallingwater	28	2.2%
13	Ligonier	28	2.2%
14	Gettysburg	26	2.0%
15	Pittsburgh	22	1.7%
16	Gettysburg Tour Center	20	1.5%
17	Ligonier Valley Railroad	15	1.2%
18	Bedford	13	1.0%
19	Fort Necessity	13	1.0%
20	Pie Shoppe/Laughlintown	12	0.9%
21	Bedford Springs Resort	9	0.7%
22	Latrobe	9	0.7%
23	Seven Springs Resort	9	0.7%
24	Gettysburg Visitors Center	7	0.5%
25	Johnstown Flood Museum	7	0.5%
26	Coffee Pot/Bedford	6	0.5%
27	Fort Bedford	6	0.5%
28	Latrobe Airport Museum	6	0.5%
29	Ship Hotel Site	6	0.5%
30	St. Vincent College	6	0.5%

Source: Survey of visitors to Lincoln Highway HC, 2014; 668 total respondents

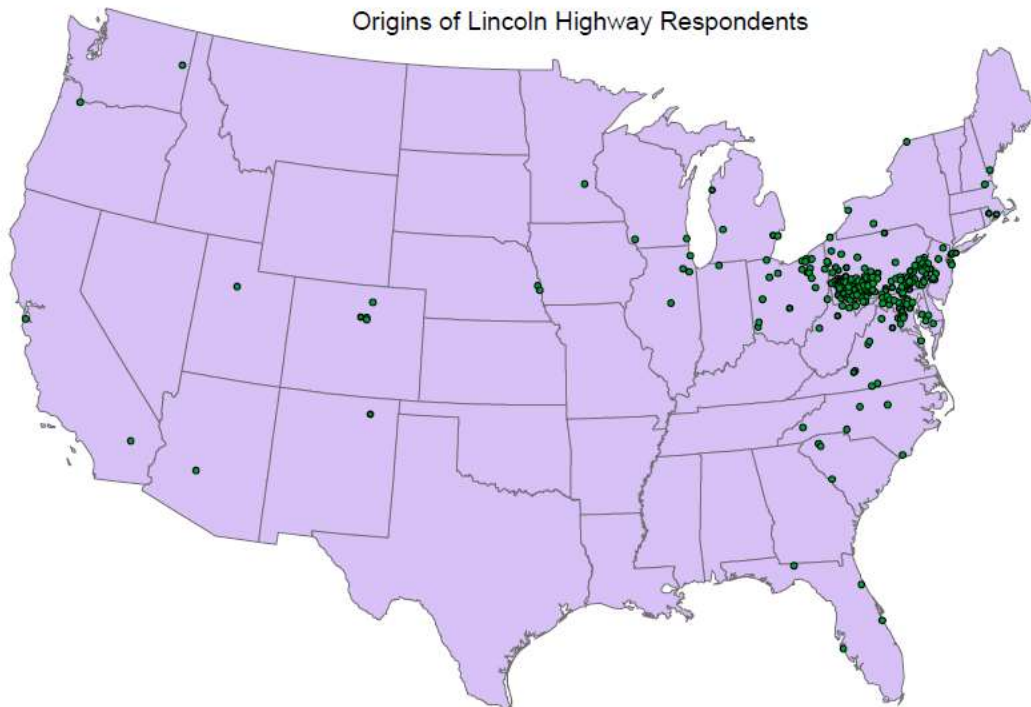
Lincoln Highway Distribution of Visitation Sites and Visitor Home Locations

Respondents completed the survey at attractions located in 9 zip codes within the Lincoln Highway Heritage Corridor, as noted on the map below.



Source: Survey of visitors to Lincoln Highway HC, 2014; 668 total respondents

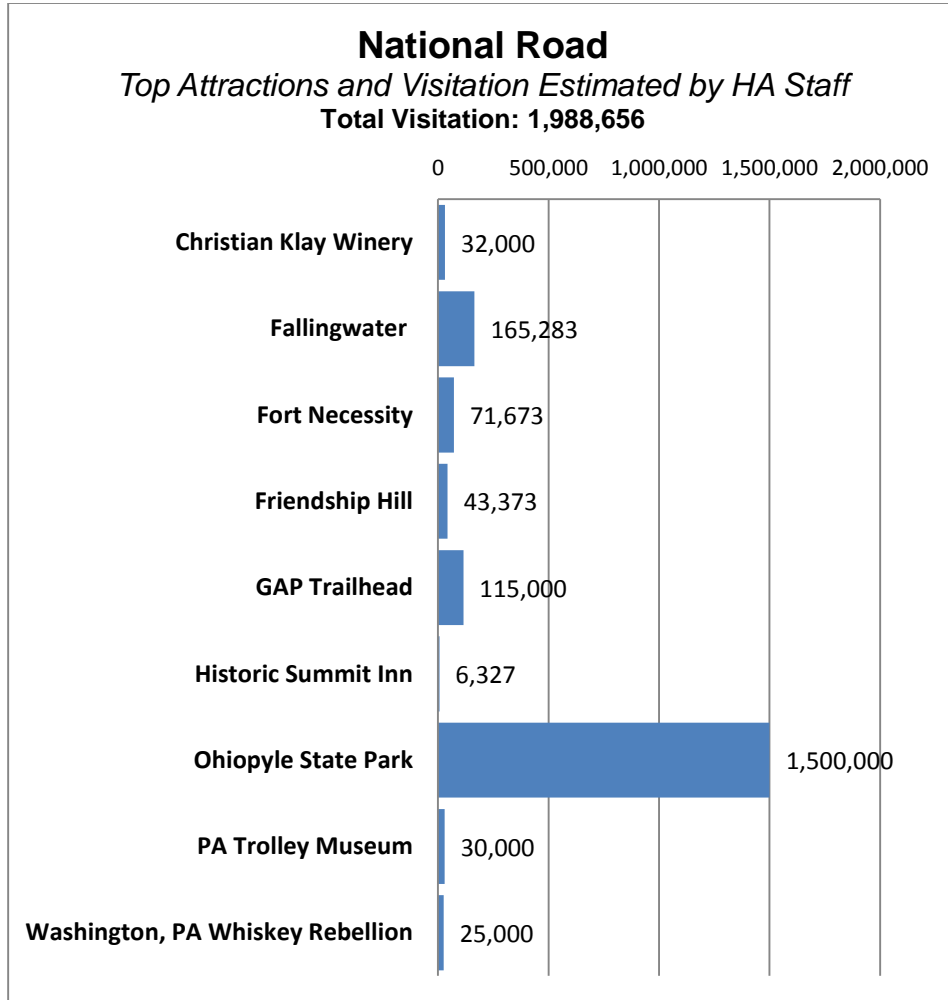
Respondents in the Lincoln Highway Heritage Corridor came from 320 zip codes and 23 states in the U.S. (plus the District of Columbia) and one other nation (Canada).



Source: Survey of visitors to Lincoln Highway HC, 2014; 668 total respondents

Appendix H

National Road Heritage Corridor Detailed Information



Source: HC staff

National Road Results: Visitor Breakout

Visitor Type

	Frequency	Percent
Local Day Visitor (less than 60 miles)	292	29%
Non-Local Day Visitor (60 miles or more)	108	11%
Overnight visitor, Motel	339	34%
Overnight visitor, Other	269	27%
	1008	100%

Travel Party Size

How many adults are in your travel party	915	2.39
How many youths are in your travel party (under 18)	219	2.58

Pennsylvania or Out-of-State Visitors

	Frequency	Percent
Pennsylvania residents	572	55%
Out of state visitors	464	45%
Total	1036	100%

Reason for Your Visit

	Frequency	Percentage
I live here	91	8%
Visiting friends	105	10%
See heritage sites	467	43%
Outdoors	343	32%
Passing through	72	7%
	1078	100%

Source: Survey of visitors to National Road HC, 2014; 1036 total respondents

National Road Top 30 Attractions Cited by Respondents

	Attraction	Frequency	Percent
1	Fallingwater	495	26.1%
2	Ohiopyle	482	25.4%
3	Kentuck Knob	149	7.9%
4	Nemacolin	83	4.4%
5	Fort Necessity	53	2.8%
6	Pittsburgh	50	2.6%
7	Laurel Caverns	45	2.4%
8	GAP Trail	44	2.3%
9	Hartzell House B&B	37	2.0%
10	Friendship Hill	36	1.9%
11	Summit Inn	32	1.7%
12	Flight 93 Memorial	25	1.3%
13	Nemacolin Woodlands Resort	19	1.0%
14	Seven Springs Resort	19	1.0%
15	Nemacolin Castle	17	0.9%
16	Whiskey Rebellion Festival	13	0.7%
17	Ligonier	11	0.6%
18	Christian Klay Winery	10	0.5%
19	Confluence	10	0.5%
20	Stone House Inn	10	0.5%
21	Yough River	10	0.5%
22	Polymath Park	9	0.5%
23	Grey Towers, Milford	8	0.4%
24	Jumonville	8	0.4%
25	Braddock's Grave	7	0.4%
26	Firefly Grill	6	0.3%
27	Gettysburg	6	0.3%
28	Deep Creek, MD	5	0.3%
29	Ferncliff Trail	5	0.3%
30	Mount Washington Tavern	5	0.3%

Source: Survey of visitors to National Road HC, 2014; 1036 total respondents

National Road Distribution of Visitation Sites and Visitor Home Locations

Respondents completed the survey at attractions located in 17 zip codes within the National Road Heritage Corridor, some of which overlap on the map below.



Source: Survey of visitors to National Road HC, 2014; 1036 total respondents

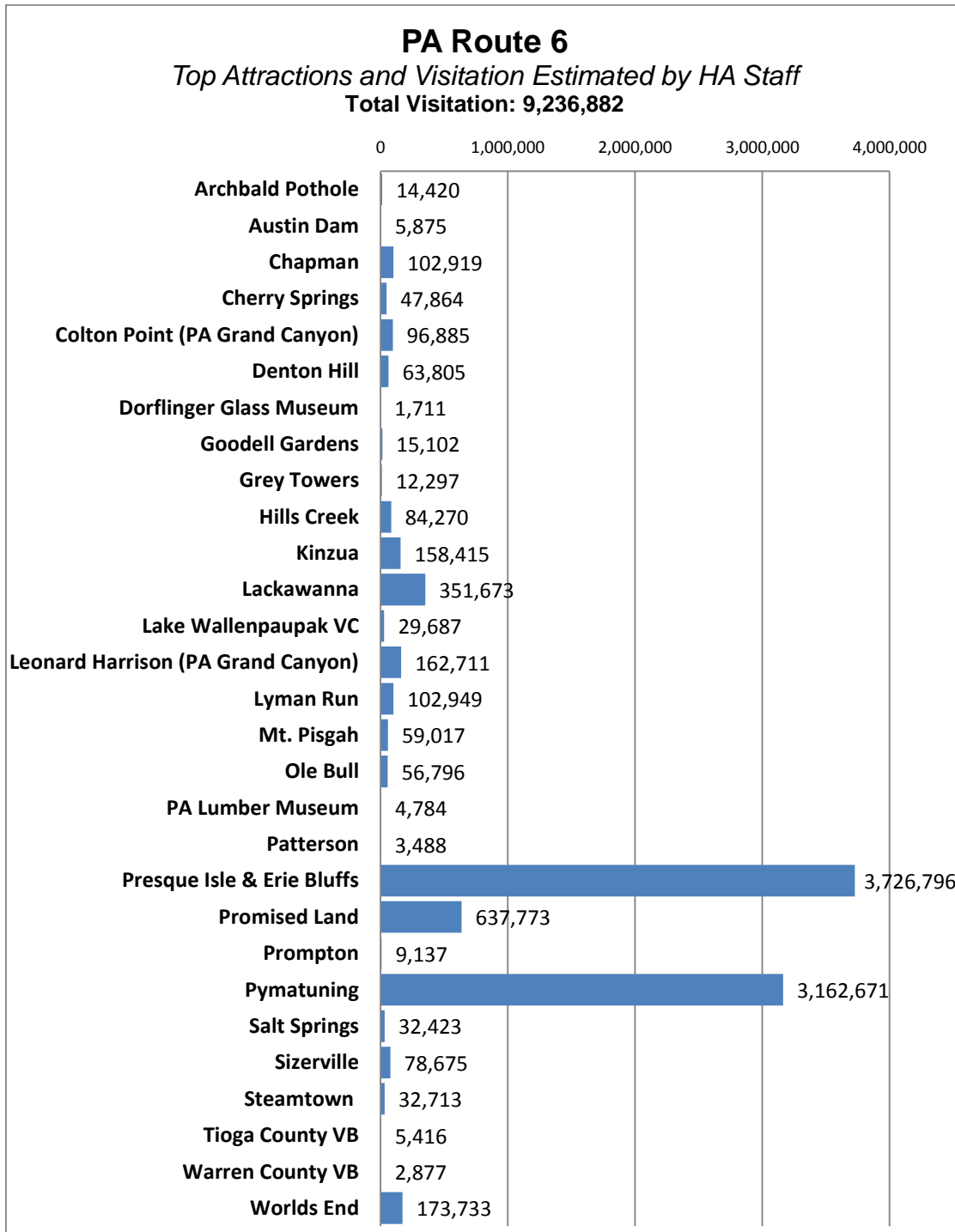
Respondents in the National Road Heritage Corridor came from 622 zip codes and 40 states in the U.S. (plus the District of Columbia) and four other nations (Australia, Canada, France and Italy).



Source: Survey of visitors to National Road HC, 2014; 1036 total respondents

Appendix I

PA Route 6 Heritage Corridor Detailed Information



Source: HC staff

PA Route 6 Results: Visitor Breakout

Visitor Type

	Frequency	Percent
Local Day Visitor (less than 60 miles)	91	12%
Non Local Day Visitor (60 miles or more)	67	9%
Overnight visitor, Motel	228	31%
Overnight visitor, Other	360	48%
	746	100%

Pennsylvania or Out-of-State Visitors

	Frequency	Percent
Pennsylvania residents	472	60%
Out of state visitors	309	40%
Total	781	100%

Travel Party Size

	Frequency	Mean
How many adults are in your travel party	673	2.41
How many youths are in your travel party (under 18)	299	3.07

Reason for Visit

	Frequency	Percent
I live here	128	16%
Visiting friends	127	16%
See heritage sites	217	27%
Outdoors	249	30%
Passing through	96	12%
	817	100%

Source: Survey of visitors to PA Route 6 HC, 2014; 781 total respondents

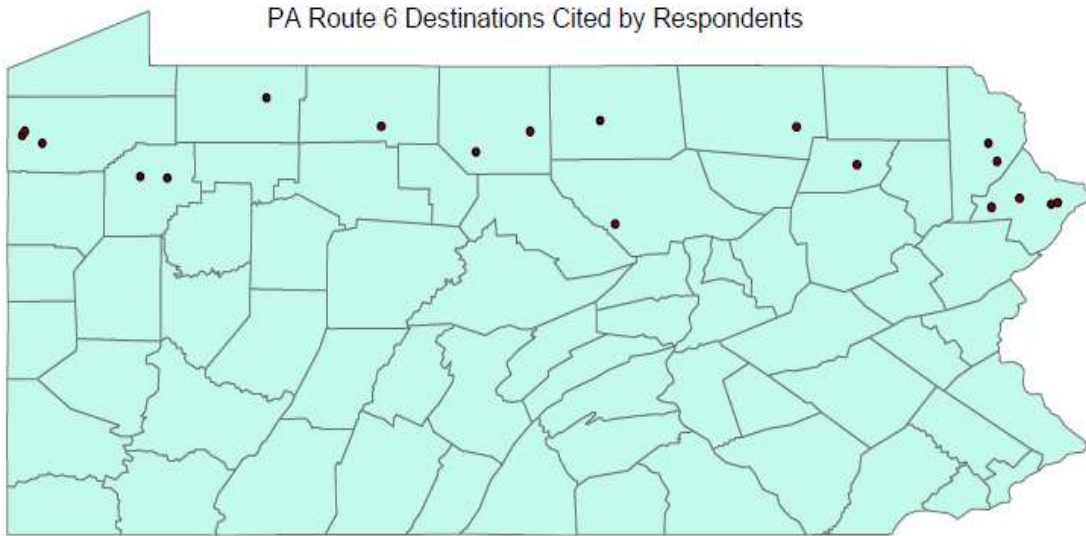
PA Route 6 Top 30 Attractions Cited by Respondents

	Attraction	Frequency	Percent
1	Kinzua Bridge State Park	114	8%
2	Kinzua Bridge Skywalk	99	7%
3	Dorflinger Glass Museum	84	6%
4	PA Lumber Museum	80	5.7%
5	Lake Wallenpaupack	79	5.6%
6	Pymatuning State Park	75	5.3%
7	PA Grand Canyon	71	5.0%
8	Grey Towers, Milford	70	5.0%
9	Kinzua Dam	48	3.4%
10	Warren County Visitors Bureau	23	1.6%
11	Kinzua	22	1.6%
12	Pymatuning Fish Hatchery	22	1.6%
13	Flickerwood Winery	21	1.5%
14	Wellsboro	21	1.5%
15	Elk Country Viewing Center	18	1.3%
16	Allegheny National Forest	16	1.1%
17	Tioga County Visitors Bureau	16	1.1%
18	Zippo Museum	16	1.1%
19	Bushkill Falls	14	1.0%
20	Honesdale	14	1.0%
21	Rim Rock	14	1.0%
22	Hawley Silk Mill	12	0.9%
23	Leonard Harrison State Park	12	0.9%
24	Linesville	10	0.7%
25	Pymatuning Wildlife Learning Center	10	0.7%
26	Lyman Lake	9	0.6%
27	Ice Mine	8	0.6%
28	Milford	8	0.6%
29	Pymatuning Deer Park	8	0.6%
30	Tioga Central Railroad	8	0.6%

Source: Survey of visitors to PA Route 6 HC, 2014; 781 total respondents

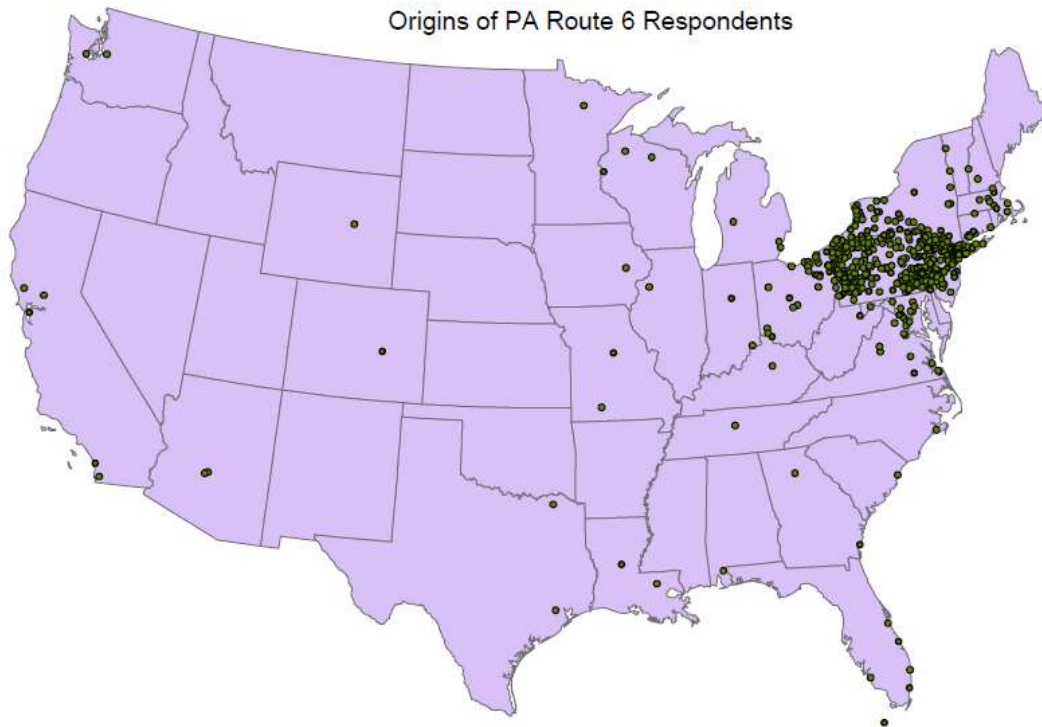
PA Route 6 Distribution of Visitation Sites and Visitor Home Locations

Respondents completed the survey at attractions located in 21 zip codes within the PA Route 6 Heritage Corridor, some of which overlap on the map below.



Source: Survey of visitors PA Route 6 HC, 2014; 781 total respondents

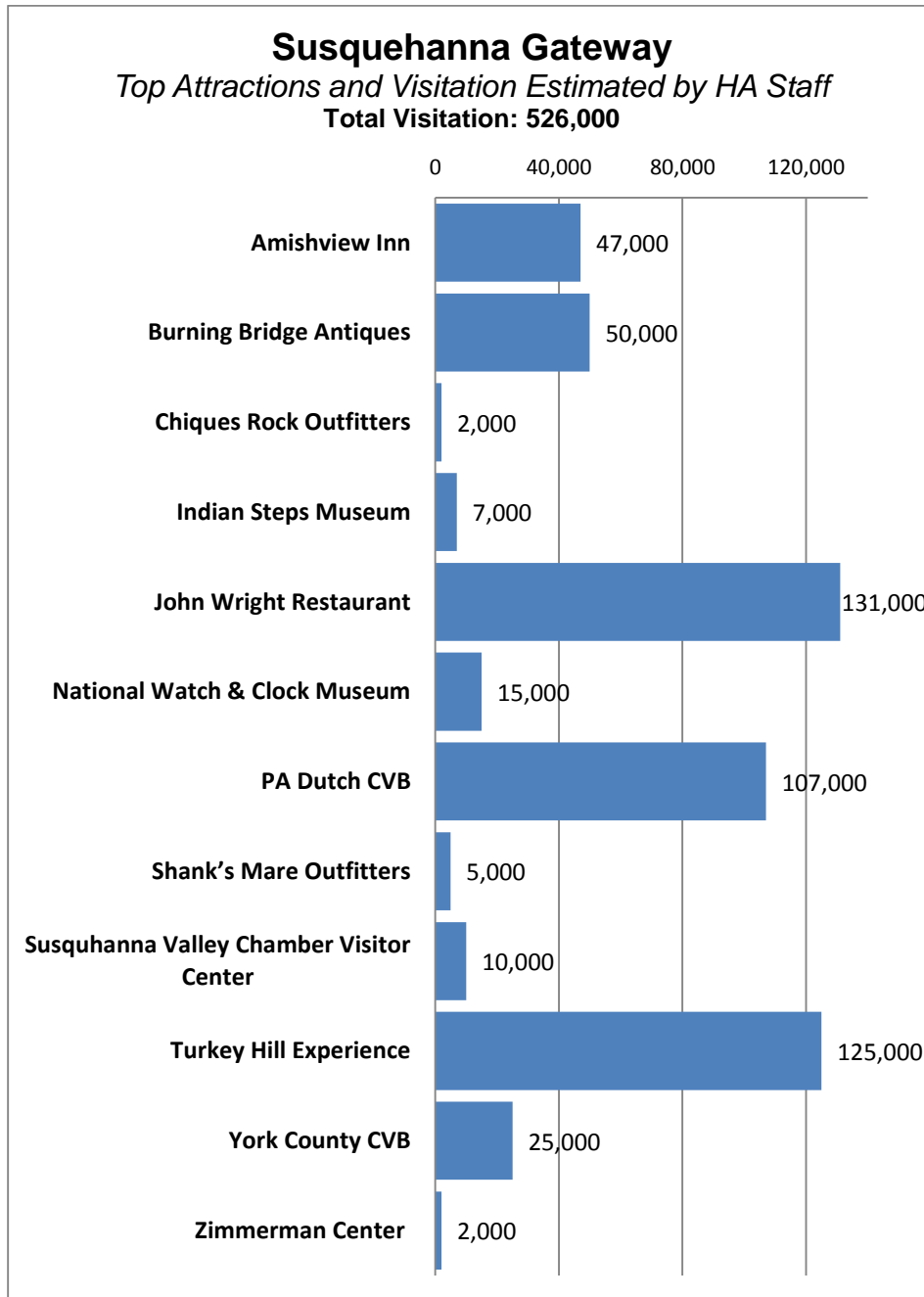
Respondents in the PA Route 6 Heritage Corridor came from 504 zip codes and 35 states in the U.S. and four other nations (Canada, France Germany and Denmark).



Source: Survey of visitors to PA Route 6 HC, 2014; 781 total respondents

Appendix J

Susquehanna Gateway Heritage Area Detailed Information



Source: HA staff

Susquehanna Valley Results: Visitor Breakout

Type of Visitor

	Frequency	Percent
Local Day Visitor (less than 60 miles)	109	22%
Non-local Day Visitor (60 miles or more)	32	6%
Overnight visitor, Motel	249	49%
Overnight visitor, Other	115	23%
Total	505	100%

Pennsylvania or Out-of-State Visitors

	Frequency	Percent
Pennsylvania residents	259	50%
Out of state visitors	256	50%
Total	515	100%

Travel Party Size

	Frequency	Mean
How many adults are in your travel party	420	2.34
How many youths are in your travel party (under 18)	123	2.18

Reason for Visiting

	Frequency	Percentage
I live here	110	21%
Visiting friends	59	11%
See heritage sites	260	50%
Outdoors	46	9%
Passing through	44	8%
	519	100%

Source: Survey of visitors to Susquehanna Gateway HA, 2014; 515 total respondents

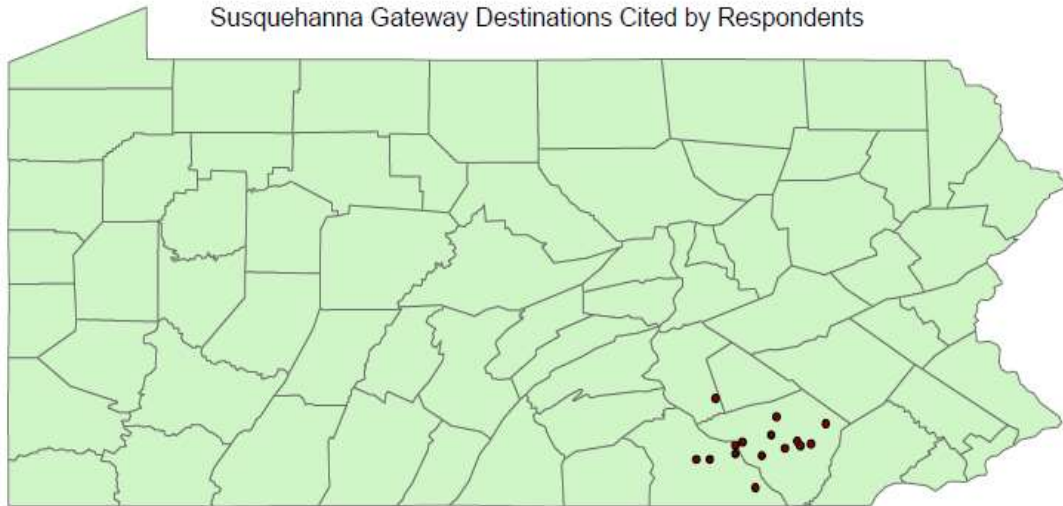
Susquehanna Gateway Top 30 Attractions Cited by Respondents

	Attraction	Frequency	Percent
1	Amishview Inn	127	10.7%
2	Turkey Hill Experience	100	8.4%
3	Zimmerman Center	81	6.8%
4	Kitchen Kettle Village	43	3.6%
5	National Watch & Clock	39	3.3%
6	Sight and Sound Theatre	28	2.4%
7	PA Dutch Visitor Center	25	2.1%
8	Bridge Bust	21	1.8%
9	Hershey	21	1.8%
10	Hershey Park	20	1.7%
11	Lancaster Visitors Center	20	1.7%
12	Lancaster	19	1.6%
13	Wrightsville	18	1.5%
14	Susquehanna Gateway	17	1.4%
15	Bird in Hand Farmers Market	16	1.4%
16	John Wright Restaurant	16	1.4%
17	Indian Steps Museum	15	1.3%
18	quilt shops	15	1.3%
19	Tanger Outlets	14	1.2%
20	Columbia	13	1.1%
21	Hershey Chocolate World	13	1.1%
22	Rockvale Outlets	13	1.1%
23	outlets	12	1.0%
24	Strasburg Railroad Museum	12	1.0%
25	Sight and Sound Theater	11	0.9%
26	American Music Theater	10	0.8%
27	Harley Davidson Factory	10	0.8%
28	buggy rides	9	0.8%
29	Gettysburg	9	0.8%
30	Amish country	8	0.7%

Source: Survey of visitors to Susquehanna Gateway HA, 2014; 515 total respondents

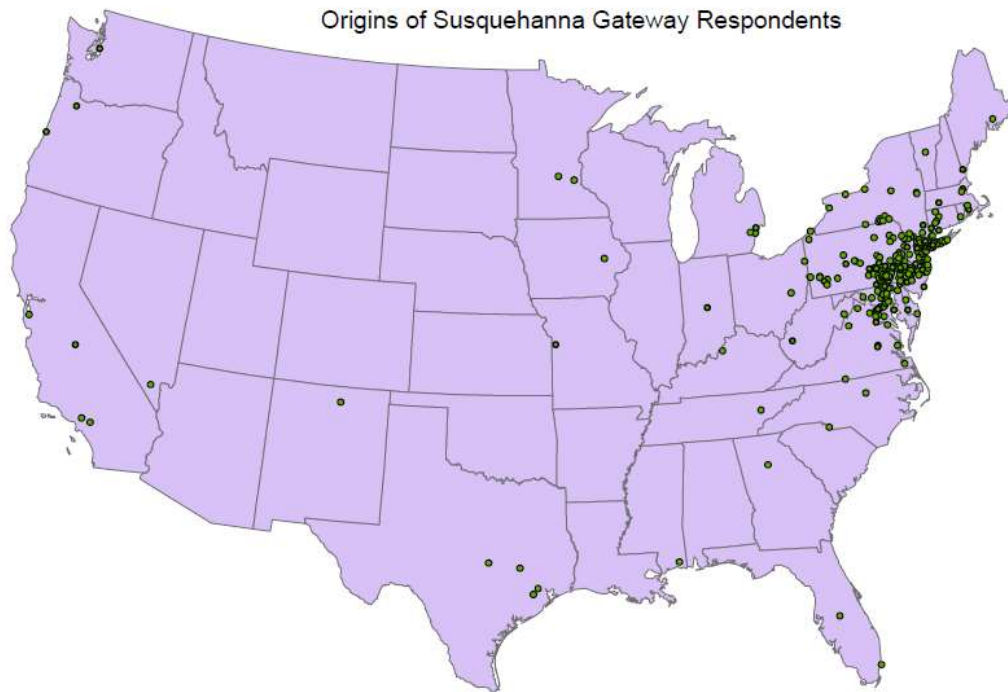
Susquehanna Gateway Distribution of Visitation Sites and Visitor Home Locations

Respondents completed the survey at attractions located in 16 zip codes within the Susquehanna Gateway Heritage Area, some of which overlap in the map below.



Source: Survey of visitors to Susquehanna Gateway HA, 2014; 515 total respondents

Respondents in the Susquehanna Gateway Heritage Area came from 317 zip codes and 30 states in the U.S. (plus the District of Columbia) and two other nations (Australia and the Netherlands).



Source: Survey of visitors to Susquehanna Gateway HA, 2014; 515 total respondents