



5.0 Seaway Trail Marketing

5.1 Byway Participation: Opportunities and Barriers

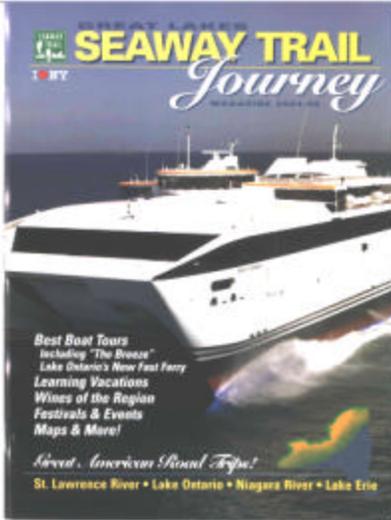
To assure its success, the Seaway Trail's managers will need to capitalize on its opportunities and anticipate perceived barriers to participation. The Seaway Trail features all of the elements byway visitors are interested in, including interaction with the water. Waterslides are a particularly popular activity. A *National Survey on Recreation and the Environment* found that byway visitors include 56 % of the American public. It executed a survey to find their preferences and perceptions.

The survey findings in regards to activities in which byway visitors participated include:

- 66 % participated in swimming, with visiting a waterslide as the most popular swimming activity
- 52 % visited historic sites
- Almost half viewed flora and fauna and 36 % were bird watchers
- Bicycling and boating were each enjoyed 41 %, while 36 % were anglers

The most-cited factor constraining byway participation was a lack of time (52 %). Other factors cited by survey respondents included:

- Lack of information was cited by 18 %
- Perception of a lack of attractions, not enough to see or do, was cited by 17 %
- Safety concern was cited by 16 %
- 14 and 11 % cited increased comfort with expressways and a perception of lack of services on rural roadways, respectively.



Seaway Trail, Inc.'s Journey magazine includes Pennsylvania content.

The DCNR found that in Pennsylvania, heritage tourism faced the following challenges:

- Lack of a formal mechanism to coordinate the many heritage tourism activities and initiatives and no entity charged with providing vision and leadership for heritage tourism efforts.
- Lack of public education and awareness of the wide range of benefits offered by heritage tourism development
- Lack of a systematic means of providing guidelines, technical assistance or incentives to private developers, non-profit organizations and local communities to ensure that heritage sites are developed to a uniformly high standard
- Inadequate visitor service infrastructure to meet current or future needs
- Need for a more aggressive and integrated marketing effort at the state level to attract new visitors and encourage them to extend their visits
- Although a substantial amount of investment had been made in heritage tourism significantly more was needed

The Seaway Trail in Pennsylvania is in a unique position among Scenic Byways because although it is a new Scenic Byway for Pennsylvania and the nation, it is affiliated with Seaway Trail, Inc., the membership organization that has been managing the Seaway Trail in New York since 1978. Seaway Trail, Inc. has been working with Pennsylvania Seaway Trail since its initial development and state designation.

The Pennsylvania Seaway Trail is included in Seaway Trail, Inc. marketing efforts and in many of its publications and educational materials. Pennsylvania's portion of the Seaway Trail is included in these publications as funding permits, as older publications are revised and as newer materials are developed.

The Seaway Trail in Pennsylvania benefits enormously from its relationship with Seaway Trail, Inc. Marketing of the Seaway Trail in Pennsylvania has the opportunity to focus on three fronts:

- Capitalizing on its opportunities to dovetail with existing and established Seaway Seaway Trail marketing opportunities
- Developing programs and materials that highlight the Scenic Byway's unique qualities to the leisure traveling public in general and regional tourists in particular
- Participating in Pennsylvania's aggressive tourism marketing programs

5.2 Linkages with Other Scenic Byways

The Seaway Trail forms important regional linkages with other byways and forms a bridge between the established Seaway Trail National Scenic Byway in New York and the growing Lake Erie Coastal Ohio Scenic Byway.

It also forms a regional link to the Grand Army of the Republic Byway. Marketing efforts and programs can also focus on regionally linking the Seaway Trail with other Pennsylvania-designated scenic byways including the Bucktail Trail, Laurel Highlands and the National Road.

The maps below illustrate the position of the Seaway Trail with regard to other scenic byways.

5.3 Existing Seaway Trail Programs

Seaway Trail, Inc. has a number of programs encompassing both self-guided and guided touring of the Seaway Trail. These include:

- Journey Magazine ? an annual magazine featuring theme-based editorials, destination-based advertising, maps, membership listings
- Maps for special byway traveling segments, for example, bicyclists, motorists, etc.
- "Great Lakes Seaway Drives" including five to 14-day road trips including itineraries for independent travelers and directed at the European market
- Roadside kiosks currently in place at 60 public sites in New York including parks and pull-offs; development of design and landscape standards for the kiosks; and themed interpretive panels
- Publications and videos including guides to the War of 1812, natural attractions along the Seaway Trail, lighthouses, shipwrecks and others
- Development of Seaway Trail Walks ©, guided walks of eight Seaway Trail communities, including the City of Erie, led by local volunteers
- Development of a "Museum without Walls" of the War of 1812 featuring distinctive brown signs directing visitors to markers and plaques describing War of 1812 events along the Seaway Trail
- French and Indian 250th anniversary 2005-2010 commemoration including establishment of a special website, development of a traveling exhibit and incorporating existing materials

Seaway Trail LIGHOUSES



A 4th edition, illustrated guide to the historic lighthouses along the Seaway Trail, one of America's Byways

Seaway Trail Lighthouses (above) is one of several special publications available for byway travelers and special interest tourists. Others include guides to the ecology and natural history of the Seaway Trail and a Guidebook to the War of 1812 (below). As funding becomes available, Pennsylvania's portion of the byway can be added to all Seaway Trail publications.

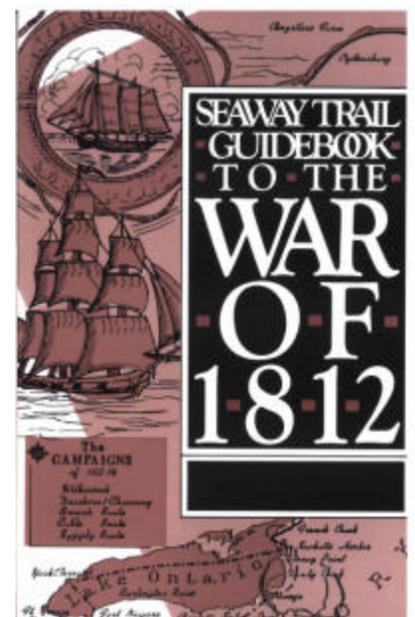


Figure 5-1 - Seaway Trail Byway Context
 Pennsylvania Byways



Source: peter j. smith & company, inc.

The Pennsylvania portion of the Seaway Trail can continue to reap benefits of the approaches that have been developed by Seaway Trail, Inc. Continued participation and strong affiliation is crucial to the Pennsylvania Seaway Trail's success and a higher profile for Pennsylvania attractions and activities should continue to develop.

5.4 Seaway Trail Marketing Opportunities

The Seaway Trail in Pennsylvania is currently adequately marked with Seaway Trail signs. There are some confusing intersections along the Seaway Trail, and elements of the Futures Plan are designed to address these shortfalls. Further, relocation of the Seaway Trail signs on the Bayfront onto the Bayfront Parkway and the route revision will both help make Seaway Trail wayfinding easier and thus improve the marketability of the Seaway Trail.

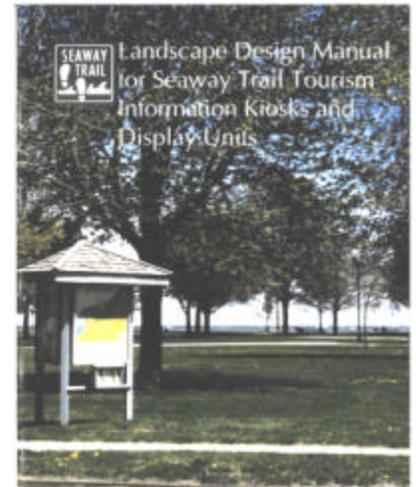
The Seaway Trail in Pennsylvania is rich in opportunities to dovetail with the Seaway Trail in New York as well as to develop its own unique identity. Consistent with the Seaway Trail in New York, the Pennsylvania Seaway Trail can develop its French and Indian War, War of 1812 and Revolutionary War and lighthouse tourist attractions. All of these attractions dovetail with the Seaway Trail in New York. But they also stand on their own as primary attractions for history buffs, lighthouse enthusiasts and others.

These sites should be signed and interpretive panels should be installed. Seaway Trail kiosks include maps of the Seaway Trail, interpretive information and brochures. The Seaway Trail kiosk should be adapted for Pennsylvania. The repetition of the signage and the components of the panels and kiosks reinforce and reassure visitors that they're still on the right route.

Seaway Trail, Inc. developed a manual for sponsor groups to guide them in the siting, design and maintenance of signs, kiosks, interpretive panels and other, similar, Trailside elements. These elements increase the educational as well as the recreational value of the Seaway Trail experience. Adoption of this or a similar manual will assist in ensuring consistency in design and construction of these elements.

The touring public will rely upon signs, panels and kiosks as they tour the Seaway Trail. They make theme-based self-guided tours possible. Themes for self-guided tours consistent with the Interpretive Plan and the Futures Plan could include:

- French and Indian War ? A major Seaway Trail attraction featuring the first and second Presque Isle Forts and potential linkages with Fort LeBoeuf in present-day Waterford via the Portage Road established by the French, site of only statue of George Washington in a British uniform;



Seaway Trail, Inc.'s landscape design manual (above) guides development of interpretive kiosks.



Located at the end of the Erie Harbor Channel, the North Pier Lighthouse has been guiding boats into Erie Harbor since 1858. A lens used in the North Pier Lighthouse is part of the lighthouse exhibit at the Erie Maritime Museum.

250th commemoration runs through 2010; the French and Indian War theme begins in Ogdensburg, NY, site of Fort LaPresentation near the eastern end of the Seaway Trail.

- War of 1812 ? Multiple sites on the Seaway Trail in Pennsylvania including those related to the US Brig *Niagara*, Commodore Oliver Hazard Perry and the Battle of Lake Erie. This theme runs throughout the Seaway Trail in New York and Pennsylvania and to Put-in-Bay, Ohio on the proposed Lake Erie Coastal Ohio byway; other linkages to Philadelphia and Pittsburgh, where many of the carpenters who built Perry's fleet originated.
- Nature and Eco-tourism ? Presque Isle State Park is the standout nature and eco-tourism destination for the Seaway Trail in Pennsylvania; other sites include Erie Bluffs State Park, site of the unique "bio-blitz;" Gamelands Scenic Loop; potential linkages to Pymatuning State Park in Crawford County; potential for inclusion of use of Blueways for those interested in the geology and landforms of the Seaway Trail, particularly the bluff.
- Lighthouses ? Three important lighthouses in and around Presque Isle State Park are already featured prominently by lighthouse aficionados; these are major destinations for culture and heritage tourists; linkages to other local culture and heritage sites on the Seaway Trail including the lighthouse exhibit at the Erie Maritime Museum which features a lens used in the North Pier Lighthouse; and off-trail destinations like the Erie Historical Society Watson Curtze Museum and others.
- Cultural sites ? The Erie Area Convention & Visitors Bureau markets visual and performing arts; there is a potential for links to the Seaway Trail Scenic Byway cultural sites including the Old Orthodox Church, Soldier's and Sailors Home and others.
- Agri-Tourism ? The Seaway Trail abounds in agri-tourism potential for its full length and self-guided tours can include family-friendly u-pick and farm stands and the area's young wine industry offering tours and tastings; potential linkages to off-Seaway Trail wineries; the east county is part of the Concord Grape Heritage Association with neighboring New York.
- Scenic spots ? The Seaway Trail in Pennsylvania offers dramatic topography and breathtaking views of Lake Erie; a self-guided tour could incorporate "Sunset Spots" to celebrate the area's famous sunsets.

The Seaway Trail, Inc., plan for Pennsylvania, the Amendment for its Action Plan II, recommended that the Seaway Trail in Pennsylvania gather and assess the visitor base, identify users and visitors for the facilities and experiences along the corridor, profile trends and develop a strategy to improve coordination and promotion to current and new audiences. Through Pennsylvania's contract with a national tourism firm, domestic tourism and leisure visitation data are gathered and analyzed. The Erie Area Convention & Visitors Bureau uses this information as it formulates its strategies for marketing and promotions. Additionally, it has access to marketing and tourism data as summarized below.

The Action Plan II Amendment also recommended that a theme and logo for the Seaway Trail in Pennsylvania be developed and tested and that current marketing activities of Seaway Trail, Inc. be integrated into the marketing effort on the Seaway Trail in Pennsylvania.

5.5 *Serving Seaway Trail Visitors*

5.5.1 **Accommodating International Visitors**

In order to accommodate international visitors, Seaway Trail Inc. has contemplated international audiences in its Interpretation Plan and Marketing Plan. Seaway Trail, Inc. currently assumes that most if not all byway visitors traveling outside of groups will have a rudimentary command of the English language and lacking a demand for multi-lingual materials, there are no current plans to produce them. Throughout the Seaway Trail in Pennsylvania, as with the Seaway Trail in New York, multiple graphics, images and universal symbols are incorporated into published materials and signage. The Seaway Trail logo itself is internationally understandable.

The Erie Maritime Museum has a brochure in Spanish and hopes to put together a program in French in the future.

5.5.2 **Accommodating Handicapped Visitors**

There are a number of special accommodations available to ensure that wheelchair-bound visitors are able to access the Seaway Trail's resources. They include the following:

- Presque Isle State Park accommodations for disabled visitors include wheelchair accessible picnic tables and parking spaces throughout the park; all restrooms are accessible; the 5.8-mile Multi-Purpose National Recreation trail is paved along its entire length and offers access to the Perry Monument, and in winter it is plowed from the park entrance to the park office, a distance of 2.2 miles (the rest is left snow covered for skiers); a ramp and mats at Beach 7 provide swimming accessibility; East Pier fishing site is completely accessible including fishing piers, picnic tables and grills.



Major tourism attractions on the Seaway Trail include the Erie Maritime Museum (above) and Presque Isle State Park (below)



Travelers to Erie County spent approximately \$463 million in 2001, which generated \$777 million in direct, indirect and induced sales; paid about \$316 million in wages and benefits and generated about \$135 million in taxes.

- Stull Interpretive Center is completely accessible, and when it opens the Tom Ridge Center will also be accessible.
- Erie Art Museum is accessible; visitors enter through the east door and access the main gallery by elevator.
- Visitors with special needs are asked to contact the Erie Maritime Museum in advance so that they can be accommodated. All areas of the museum are accessible, but due to the nature of her construction, the Brig *Niagara* is not accessible.
- On the bayfront, all of the Port Authority's walkways and multi-use trails are accessible as is the Liberty Park Amphitheater. Liberty Park also offers an accessible playground. The fishing pier in the East Canal Basin is also accessible both with a ramp and lower railings for wheelchair-bound anglers. Bicentennial Tower is accessible with an elevator. Water taxis can accommodate wheelchairs. Wolverine Park has wheelchair accessible docks and restroom facilities as well as a lift for transfers to the boats.
- An accessible restroom is being constructed at the South Pier and another is to be constructed at the East Avenue Boat Launch.
- The Center for Bayfront Studies has a sailing program for people with disabilities called Erie Adaptive Sailing Experience (EASE). The program offers sailing instruction in Access Sailing Dinghies. These boats can be sailed independently by individuals with disabilities. Classes are held at the accessible Wolverine Park, which has wheelchair accessible docks, restroom facilities and a lift for transfers to the boats. (The Junior League of Erie and the Bayfront Center for Maritime Studies will host the access dinghy North American championships June 18-20, 2005.)
- Lake Erie Arboretum at Frontier Park is easily accessible by wheelchair users.
- Most area hotels are accessible.

5.6 Tourism in Pennsylvania

This section summarizes current tourism promotion and development efforts in Erie County and Pennsylvania.

5.6.1 Existing Tourism Base

The domestic tourism industry in Erie County, PA accounted for nearly \$800 million in sales in 2001, according to data gathered for the State of Pennsylvania by DK Shifflet and Associates. No data has been gathered specifically addressing the generation of economic activity related to tourism along the Seaway Trail.

According to the study Shifflet prepared for the state, "The Economic Impact of Travel in Pennsylvania 2000 (revised) and 2001," direct spending by domestic travelers in Erie County in 2001 was \$462.8 million in direct sales. Indirect sales, that is, the economic activity generated by the money paid to employees and suppliers directly related to the travel industry, was estimated at an additional \$140.5 million in 2001.

The induced impact, which is generally referred to as the multiplier effect, takes place when wage earners and business owners use their wages and profits to purchase household goods and services, engage in their own leisure activity, etc. That impact is estimated as \$173.9 million for 2001.

5.6.2 Tourism Overview

According to Pennsylvania's Department of Community and Economic Development (DCED), the State has competitive advantages in the tourism industry due to the diversity of its travel and tourism assets, its proximity to one-third of the U.S. population and a strong price/value advantage compared to many of its neighbors. Pennsylvania tied with New York as the 4th most visited state by U.S. leisure travelers in 2002. Tourism is the second largest industry in the State and an important economic driver.²

5.6.3 Tourism Economic Impact

Tourism provides significant economic benefits to every county and industry in the State of Pennsylvania. According to the US Department of Labor, Bureau of Labor Statistics, annual employment in the Leisure and Hospitality within Erie County was 12,200 in 2003, a 3% increase from the annual figure for 2002.

There was a 2.6% increase in the number of leisure travelers to and within Pennsylvania between 2000 (86.3 million) and 2002 (88.6 million). Leisure travelers in 2002 spent \$14.8 billion, which was a 6% increase from 2000. In 2002, the Lake Erie Region attracted 6.1% of the State's leisure travelers, which represented a 1.3% decrease from the previous year. The Lake Erie Region had a larger %age of day-trip visitors (7.1%) than overnight visitors (5.2%).³

² Department of Community and Economic Development Website: www.inventpa.com, retrieved October 26, 2004

³ Pennsylvania Tourism Office, 2002 Pennsylvania Travel Profile, www.experiencepa.com, retrieved October 27, 2004



In 2001, domestic and international travelers spent approximately \$20.5 billion within the State, which generated \$37.2 billion in direct, indirect and induced sales and supported about 618,000 full and part-time jobs that paid \$13.3 billion in wages and benefits. Travel related spending also generated \$6.1 billion in federal, state and local taxes. Domestic and international tourists in Pennsylvania spend 7.3% less in 2001 than they did in 2000. In 2001, domestic travelers provided about 94% of total travelers expenditures.⁴

Domestic travelers in Erie County spent approximately \$463 million in 2001, which was 3.4% less than they did in 2000. The \$463 million spent by domestic travelers generated \$777 million in direct, indirect and induced sales; paid about \$316 million in wages and benefits and generated about \$135 million in taxes. The table that follows illustrates the distribution of expenditure among various categories.

Expenditure Category	2000	2001	% Change
Transportation	\$134,536	\$115,073	-14.47%
Lodging	\$37,016	\$36,136	-2.38%
Food & Beverages	\$105,327	\$105,302	-0.02%
Shopping	\$131,423	\$137,000	4.24%
Entertainment	\$44,883	\$47,197	5.16%
Other	\$26,088	\$22,088	-15.33%
County Total	\$479,274	\$462,795	-3.44%
State Total	\$20,512,893	\$19,209,532	-6.35%

Source: D.K.Shifflet & Associates Ltd.

⁴ D.K.Shifflet & Associates Ltd. The Economic Impact of Travel in Pennsylvania 2000(revised) and 2001, September 2003



5.6.4 Pennsylvania Leisure Travelers

In 2002, leisure travelers in Pennsylvania had a median age of 40, an annual household income of \$61,000 and families and couples accounted for almost two-thirds of travel parties. The leading activities of leisure travelers included sightseeing (30%), attractions (23%) and cultural and nature activities (21%).⁵ Leisure travelers to the Lake Erie Region in 2002 were younger and less affluent than the statewide average. The most popular activities of leisure travelers to the Lake Erie Region in 2002 were sightseeing (24%), dining (23%), shopping (20%), national/state parks (18%) and beach/waterfront (17%). The Lake Erie Region had a significantly higher rate of visits to beach/waterfront than all other regions in the State.

The following chart summarizes some general characteristics of leisure travelers to the Lake Erie Region.



Approximately 35% of outdoor recreation expenditures - \$1.39 billion in 1997 - involved outdoor activities on state lands. Above, the annual Erie Marathon on Presque Isle State Park

Table 5-2 - Lake Erie Leisure Trip Traveler Profile		
2002 Person Trips		
	Overnight	Day-Trip
Median Age (Years)	37.2	43.3
Median Household Income	\$55,270	\$41,460
Average Length of Stay (Days)	3.7	N/A
Average Expenditure (Per person per day)	\$70.66	\$79.34
Average Traveling Party	2.3	2.6
Accommodations		
Paid Hotel/Motel	37%	N/A
Paid Campground/RV Park	8%	N/A
Other Paid	4%	N/A
Private Home (Non-Paid)	37%	N/A
Other Non-Paid	13%	N/A
Purpose		
Visit Friends/Relatives	38%	33%
Special Event	18%	13%
Other Personal	12%	34%
Getaway Weekend	21%	11%
General Vacation	11%	9%

Source: D.K. Shifflet and Associates, Ltd. 2003, www.media.experiencepa.com

⁵ Pennsylvania Tourism Office, 2002 Pennsylvania Travel Profile, www.experiencepa.com, retrieved October 27, 2004

The 2.4 million overnight visitors to the Lake Erie Region in 2002 had a per trip average of \$551 per travel party, which was an increase of \$55 from 2001. Families averaged \$782 in expenditures, couples \$320 and adults traveling alone \$466 per trip.

5.6.4.1 Heritage Tourism in Pennsylvania

Heritage tourism development is a growing trend across the nation. Pennsylvania has been a national leader in heritage tourism for many years. Establishing Pennsylvania as the number one American Heritage Destination was identified as a marketing objective in the Draft 2004 Marketing Plan for the State.⁶

Heritage tourism in Pennsylvania includes a wide variety of historic, cultural and outdoor activities. In 1999, the Department of Conservation and Natural Resources (DCNR), the Department of Community and Economic Development (DCED), the Pennsylvania Historical and Museum Commission (PHMC), Preservation Pennsylvania and the Federation of Museums & Historical Organizations commissioned the *Pennsylvania Heritage Tourism Study*.⁷ The following are a few key findings from that study:

- For Pennsylvania, heritage tourism consisted of a wide variety of historic, cultural and outdoor activities
- In 1997, heritage tourism by Core Heritage travelers (visitors whose primary purpose for traveling to Pennsylvania was heritage tourism) accounted for 12% of the State's 112.4 million person-trips⁸, 25% of all tourism spending, and supported over 55,000 jobs
- From 1996 to 1997, Core Heritage traveler visitorship increased by 23% and their spending by 15%
- Attractions most visited by Core Heritage travelers in Pennsylvania included historic towns/districts, battlefields/forts, zoos/gardens/arboreta and art galleries/museums
- The top information resource used by Pennsylvania's Core Heritage travelers were brochures
- Among the amenities that were examined, maps and guides were the most critical to Pennsylvania's Core Heritage travelers



Top heritage tourism activities in Pennsylvania include visiting historic areas, like North East's historic downtown (above) and battlefields and forts, like the "Mad" Anthony Wayne Blockhouse in Erie (below)



⁶ 2003-2004 Tourism Marketing Plan Outline (DRAFT), www.inventpa.com, retrieved October 27, 2004

⁷ D.K. Shifflet & Associates, Ltd. Pennsylvania Heritage Tourism Study, May 1999, prepared for Pennsylvania Department of Conservation and Natural Resources et al

⁸ Person-Trips is an industry standard to measure travel volume that accounts for one person on one trip irrespective of the length of the trip. The 112.4 million figure includes all business and leisure travelers



In 2000, believing that heritage tourism had reached a plateau in the State, the DCNR, DCED, the PHMC and the Center for Rural Pennsylvania sponsored the Heritage Tourism Summit in Monroeville. The goal of the summit was to determine the status of heritage tourism in Pennsylvania and to generate ideas about how to take heritage tourism to the next level. Heritage tourism was defined as “a leisure trip with the primary purpose of visiting historic, cultural, natural, recreational and scenic attractions to learn more about the past in an enjoyable way.”⁹

The Heritage Tourism Summit Report highlighted several existing heritage tourism-related programmatic initiatives that could be built upon:

- The Pennsylvania Heritage Parks Program and National Heritage Areas
- The Pennsylvania Heritage Tourism Initiative
- The Regional Marketing Initiative
- Farmland/Open Space Preservation and Growing Greener
- State Tourism, Preservation Plans and Greenways
- The Main Street Program

5.6.4.2 Outdoor Tourism in Pennsylvania

A study of outdoor tourism was also commissioned by the DCNR. The Study defined an outdoor recreation vacation as “one where the primary reason for travel was to participate in one or more outdoor recreation activities and involved overnight travel or travel to a destination greater than 50 miles from home.”¹⁰ In 1997, outdoor travelers accounted for approximately 14% of Pennsylvania’s 112.4 million total visitors and 19% of the State’s leisure visitors. The volume of outdoor travelers had consistently increased from 13.4 million in 1995 to 15.9 million in 1997. Between 1995 and 1997, outdoor travel trips increased by 19% while leisure travel trips increased by 4%. Outdoor recreation travelers stayed overnight more often than the average leisure traveler (80% and 56% respectively), tended to stay longer (3.4 days and 2.0 days respectively) and traveled in larger groups (3.6 persons and 2.7 persons respectively).

Pennsylvania is divided into eight primary tourism regions. Erie County is located in the Lake Erie Region along with Crawford, Mercer and Venango Counties. In 1997, 11% of visitors to the Lake Erie Region came for outdoor recreation activities.

In 1997, outdoor recreation travelers to Pennsylvania spent \$4.03 billion, which included spending for transportation, lodging, food and beverages, recreation and entertainment, shopping and other

Anglers who come to Erie County, for steelhead spent nearly \$9.5 million on trip-related expenditures in 2003. Overall, this activity generates \$5.71 million in new value-added activity in Erie County, supporting 219 jobs in the economy through direct and indirect effects

⁹ Moving Heritage Tourism Forward in Pennsylvania, May 2001, prepared for Pennsylvania Department of Conservation and Natural Resources et al

¹⁰ D.K. Shifflet & Associates, Ltd., DCNR Outdoor Traveler Study



Interactive marketing web sites will provide information to raise consumer awareness of Pennsylvania, online advertising, tools to track consumer behavior and preferences and online reservation systems and contact information.

spending. Approximately 35% of outdoor recreation expenditures (\$1.39 billion) involved visitors who at some point during their trip participated in outdoor activities on state lands (state or public forests, parks or game lands).

Within the Lake Erie Region, visitation to state lands accounted for 46% of outdoor travel. Only the Allegheny National Forest Region (63%) had a higher %age of outdoor recreation travelers who visited state lands.

Fishing is a growing source of tourism and economic development in Erie County and particularly along the Seaway Trail on Lake Erie and along the tributary streams. "Survey results suggest that anglers attracted to the Erie County, Pennsylvania stream and shoreline steelhead fishery spent nearly \$9.5 million on trip-related expenditures in 2003.

"Overall, this activity generates \$5.71 million in new value-added activity in Erie County, supporting 219 jobs in the economy through direct and indirect effects."¹¹

The top markets for supplying outdoor recreation travelers to the State were the State itself (44%), New York (14%), New Jersey (10%), Ohio (6%) and Virginia (4%). While the origin states for outdoor travelers within the eight tourism regions were generally the same as the State as a whole, there were some differences. Within the Lake Erie Region the top origin states for outdoor travelers were Pennsylvania (62%), Ohio (14%), New York (9%), California (5%) and Maryland (3%).

Visitor profiles of the State's top primary outdoor activities (nature/sightseeing, camping, hiking, hunting/fishing and whitewater rafting/boating/canoeing) indicated that the Lake Erie Region was a popular region for campers and rafters/boaters/canoers. The primary season for visiting the Lake Erie Region was May to September.

5.7 Statewide Marketing Strategy

In recognition of the importance and competitive nature of the tourism industry, Pennsylvania has developed a Strategic Tourism Master Plan that enables institutions across the State to coordinate policies and activities. At the state level the Governor's Council for Tourism provides state level leadership and guidance and the Center for Travel, Tourism and Film addresses promotion, quality control, training and product development and enhancement. At the regional level there are Tourism Promotion Agencies. The State uses the

¹¹ . Murray, C and M. Shields, Creel Analysis and Economic Impact of Pennsylvania's Lake Erie Tributary Fisheries in Erie County, Pennsylvania, with Special Emphasis on Landlocked Steelhead Trout, October 1, 2004

recommendations of its five-year Strategic Marketing Plan, as well as the annual Tourism Marketing Plan that is prepared by the Pennsylvania Tourism and Marketing Office to guide its actions.

The 2003-2004 Tourism Marketing Plan (Draft)¹² identified several strategies to address an interest-specific market and increase visitation to Pennsylvania. The Plan recommended a coordinated marketing effort with a statewide perspective where the PA Tourism Office acted as a clearinghouse for marketing for all partners and grantees. Specific strategies included:

- Forging True Partnerships - seeking out cross promotional opportunities with Destination Marketing Organizations, state agencies and associations, combining resources to allow for expanded marketing efforts into new growth areas that were not attainable with individual budget constraints
- Muscled Focus - interest specific messages that sell Pennsylvania as the place to enjoy a specific activity in which potential visitors are already interested in pursuing
- Closing the Sale - employing a call to action that directs consumers to a specifically identified end (product purchase)
- Packaging the Product - encouraging all supported marketing programs to develop and market sophisticated packages and itineraries that convey value to the consumer and result in increased visitor volume, length of stay and spending
- Fostering Program Development - developing new programs and products using grant funding opportunities and the formation of statewide partnership committees

The worldwide web is being used to reach prospective visitors. Several interactive tourism and economic development sites have been developed and traffic on these sites increased 254% between 1999 and 2000. Interactive marketing web sites will provide information to raise consumer awareness of Pennsylvania, online advertising, tools to track consumer behavior and preferences and online reservation systems and contact information.

State sponsored funding programs include: The Tourism Promotion Matching Fund and Regional Marketing Initiative Grants. The Tourism Promotion Matching Fund provides funding to designated county and regional tourism promotion agencies to conduct comprehensive travel and tourism destination marketing. Regional Marketing Initiative Grants provide partial funding for the development of comprehensive destination marketing programs.



Heritage and history are special areas of focus for statewide tourism development. Here, North East's wares are marketed in the Village Park. The tradition of grape cultivation in the area has led to discussions about establishing a Concord grape heritage park in concert with New York and Ohio.

¹² 2003-2004 Tourism Marketing Plan Outline (DRAFT), www.inventpa.com, retrieved October 27, 2004



To attract international travelers representative resources have been established in six countries: United Kingdom, Germany, France, Canada, Italy and Japan. International advertising efforts have focused on educating tour operators in overseas market. Consumer-advertising programs have also been initiated in the United Kingdom, Germany and Italy.

The tactical plan for Fall 2003 targeted adults 35-54 with household incomes of a least \$50,000. Consumer print and radio were the primary vehicles to be used. Consumer print campaign focused on the special areas of History/Heritage, Arts/Culture and Outdoor. The radio campaign focused on several key markets: Baltimore, Columbus, Cleveland, New York, Washington, Philadelphia, Pittsburgh and Harrisburg/Lancaster/York.