

2011 ANNUAL TRAVEL PROFILE The Alleghenies Region

Research Methodology

The research for this report was conducted by Longwoods International.

The results consist of:

- Estimates of the domestic volume of overnight travel on a nationwide level.
- Estimates of the volume of overnight and day travel to Pennsylvania and its tourism regions.
- Characteristics and profile of overnight and day trips to the state and the individual tourism regions.

The results are based on results from the Travel USA® annual survey of US travelers. Each quarter, a random cross-section of approximately 1 million panel members is sent an e-mail invitation to participate in the survey, or over 5 million annually.

For the 2011 travel year, this yielded: 207,014 trips for analysis nationally – 138,771 overnight trips and 68,243 day trips.

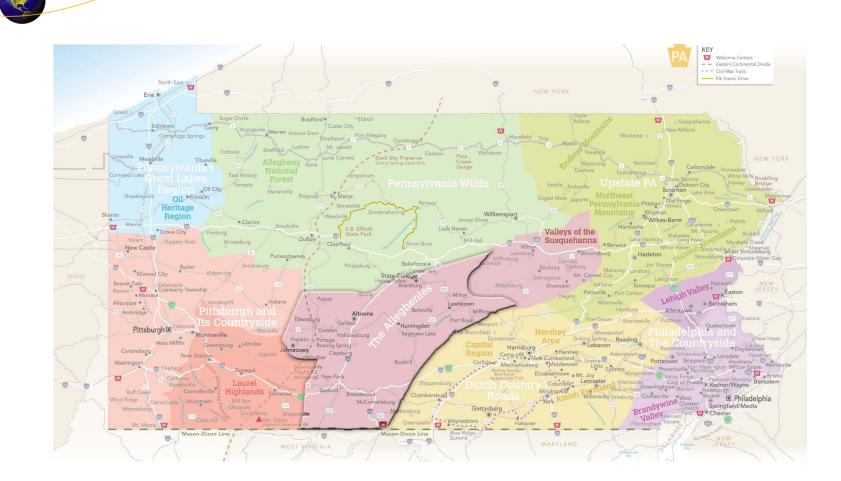
Research Methodology (cont'd)

- The *Travel USA*[®] program identified 5,790 survey respondents who visited Pennsylvania on an overnight trip and 4,530 on a day-trip in 2011.
- A follow-up survey was sent to a representative sample of these visitors to augment the information from *Travel USA*[®], providing more in-depth information on visitor spending and visitor activity, as well as strategic data on trip characteristics, planning and booking, and visitor impressions of Pennsylvania's tourism product.
- There were 1,883 total responses for the overnight segment and 990 total responses for the day-trip segment from this return sample.
- Estimates of Pennsylvania's overnight and day-trip volume were based on a number of sources, including *Travel USA*[®], the customized return-to-sample research, and consultations with Tourism Economics.

Research Methodology (cont'd)

Estimates of Pennsylvania's overnight and day-trip travel volume are based on a number of sources including Travel USA®, the custom return-to-sample research discussed above, historic data from previous research conducted for the Pennsylvania Tourism Office, and consultations with Tourism Economics, the contractor responsible for Pennsylvania's annual economic impact of travel and tourism estimates.

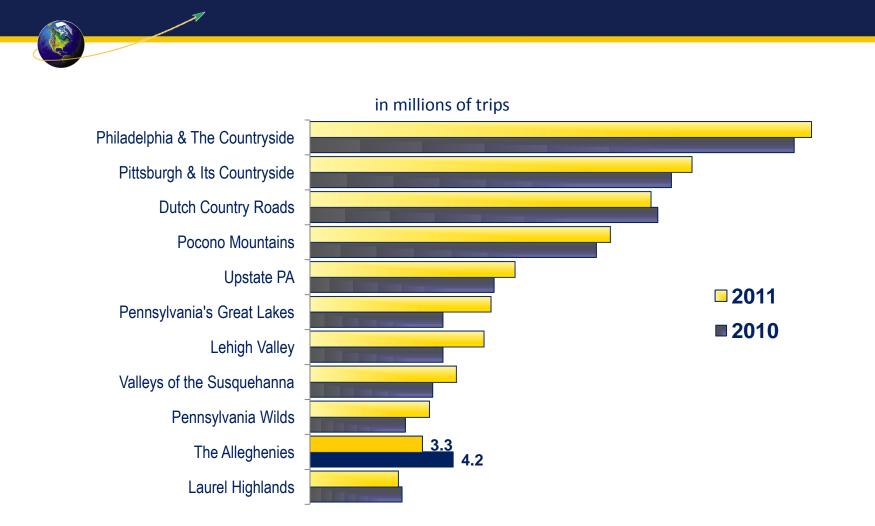
The Alleghenies Region





The Alleghenies Region Visitor Volume

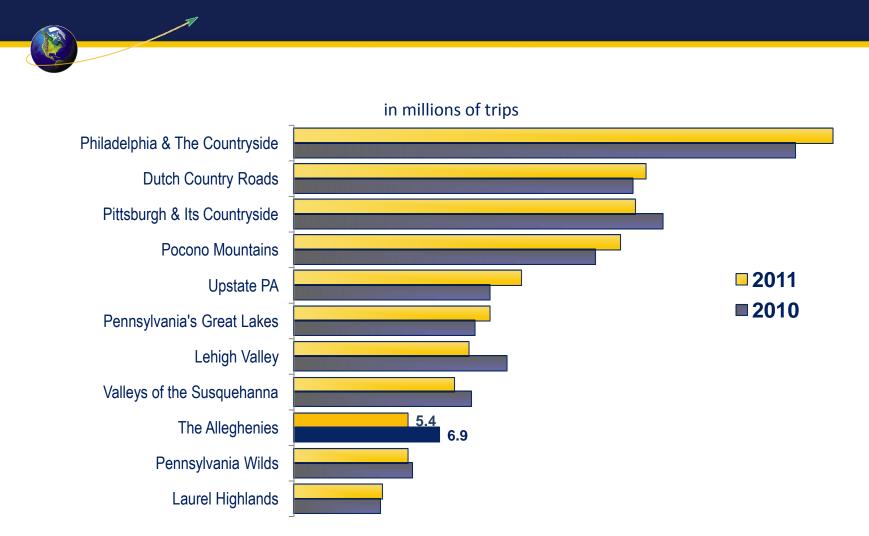
Regions Visited on Overnight Trips*



*Spent time in region

Sum or regions will exceed State total as a number of travelers visited more than one region.

Regions Visited on Day Trips*



*Spent time in region

Sum of regions will exceed State total as a number of travelers visited more than one region.

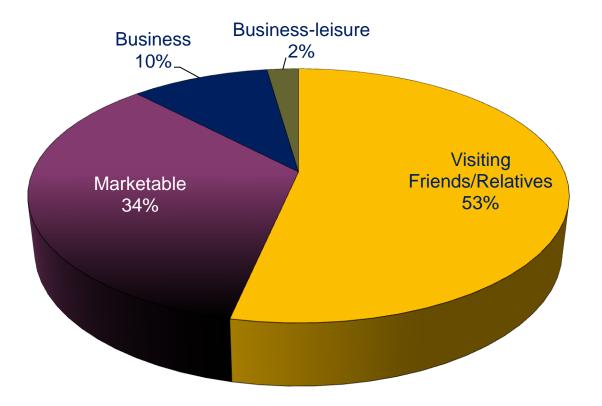


The Alleghenies Region Main Reason for Trip

Main Reason for Overnight Trip

Base: Total Overnight Trips

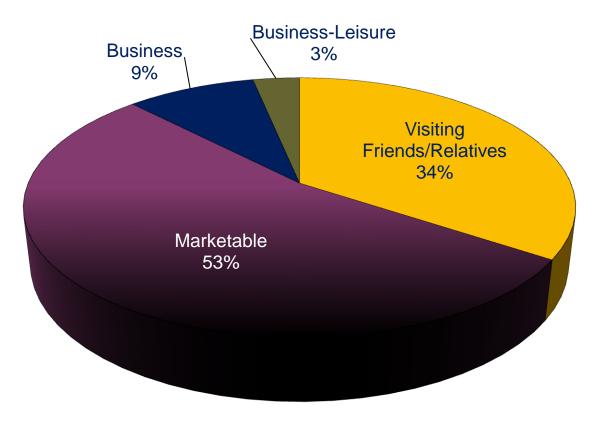
The Alleghenies region had roughly the same distribution of travel purposes for overnight travel as the statewide averages in 2011.



Main Reason for Day-Trip

Base: Total Day-Trips

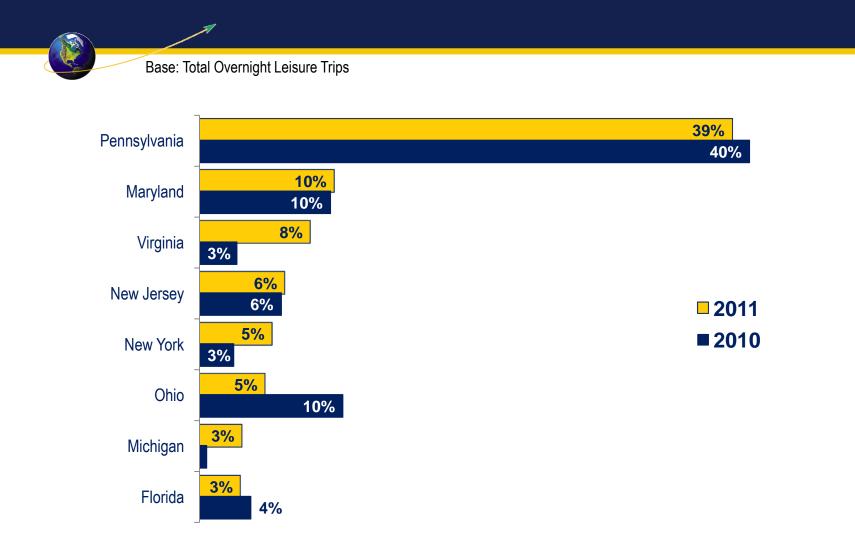
The Alleghenies region also had approximately the same distribution of travel purposes for day-trip travel as the statewide averages in 2011.





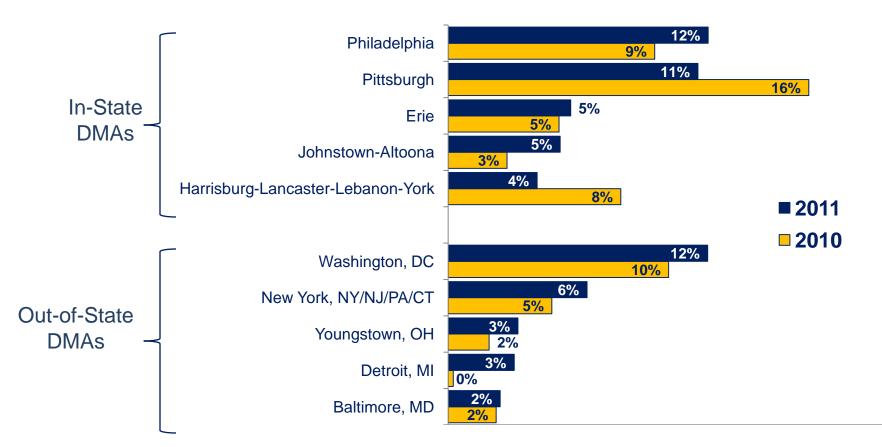
The Alleghenies Region Main Origin Markets – Overnight Trips

Main Origin States for Overnight Leisure Trips



Main Urban Markets for Overnight Leisure Trips

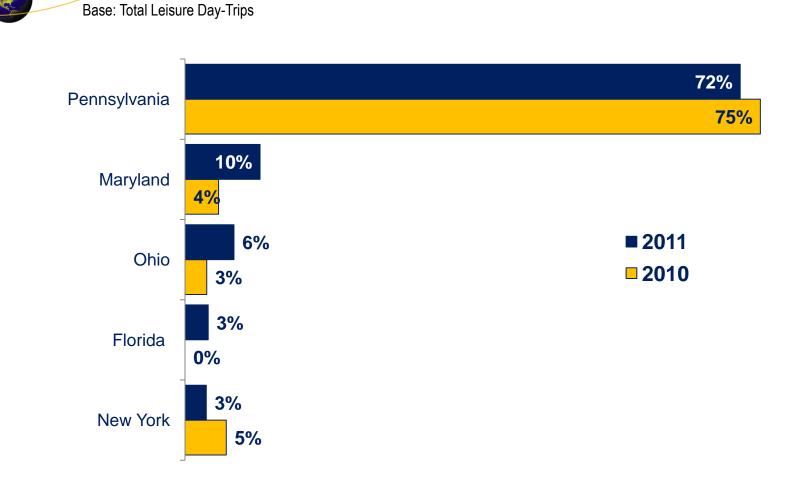
Base: Total Overnight Leisure Trips





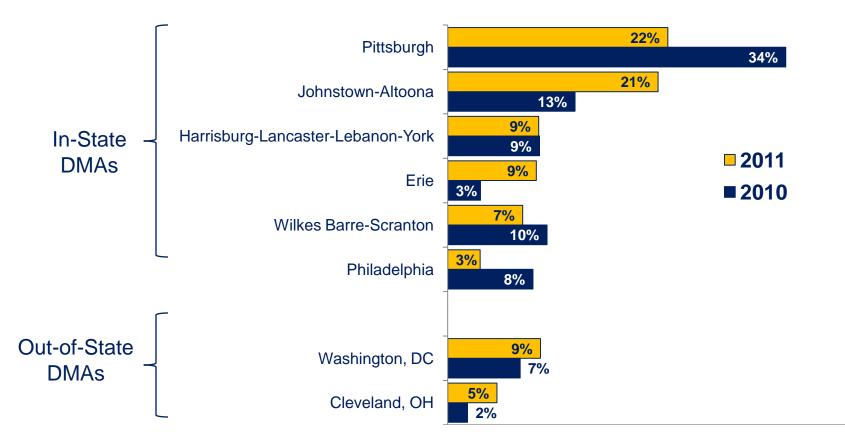
The Alleghenies Region Main Origin Markets – Day-Trips

Main Origin States for Leisure Day-Trips



Main Urban Markets for Leisure Day-Trips

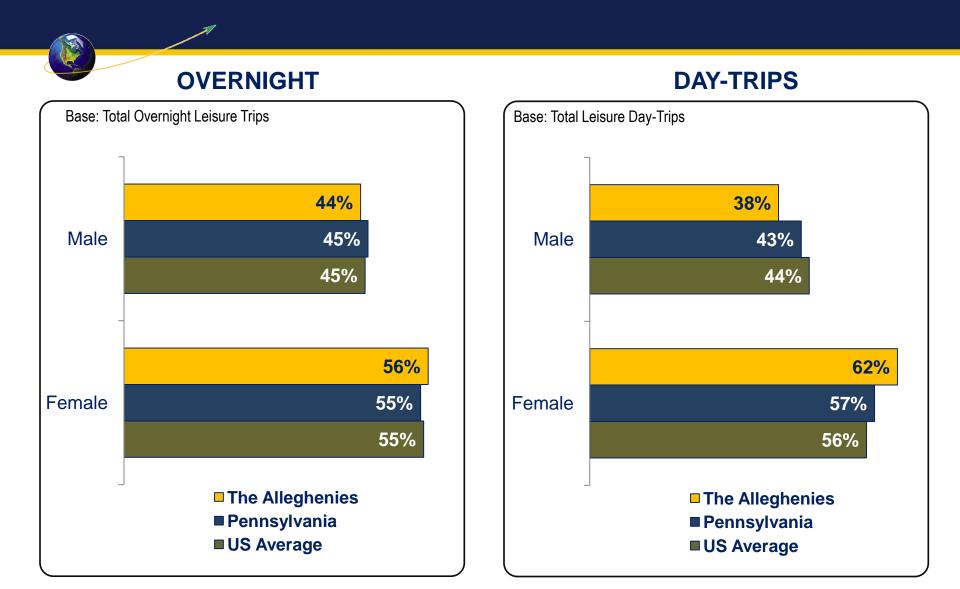
Base: Total Leisure Day-Trips



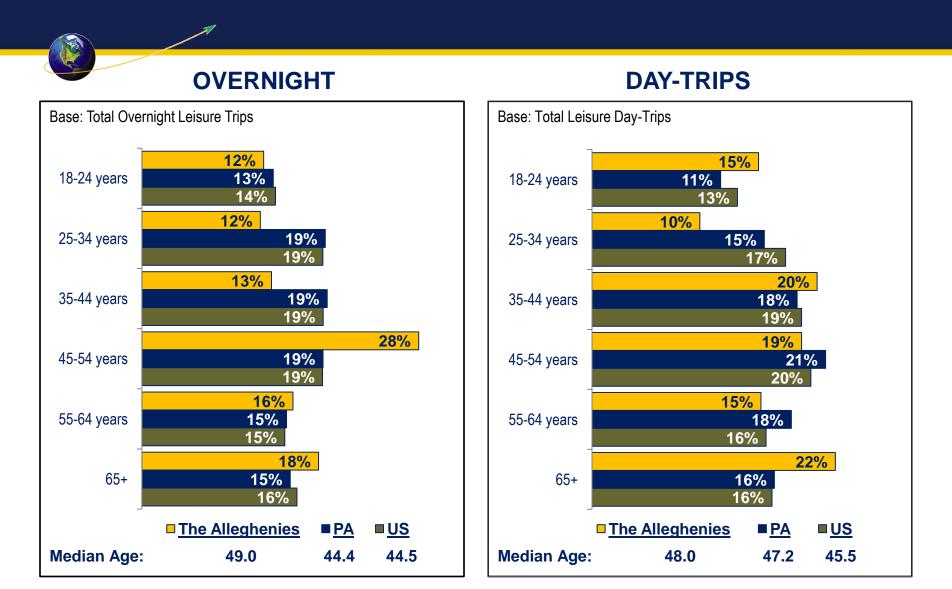


The Alleghenies Region Traveler Profile

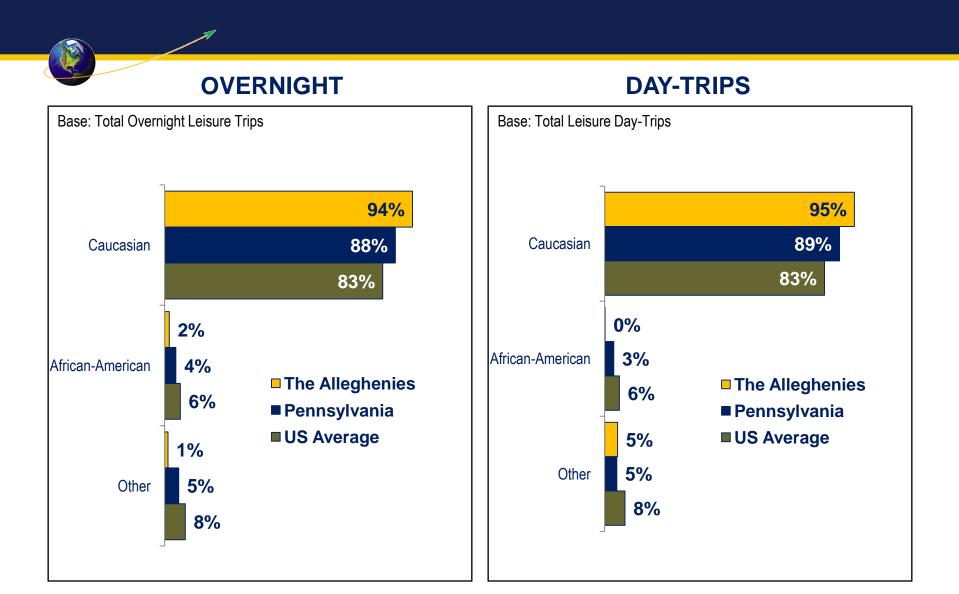
Gender



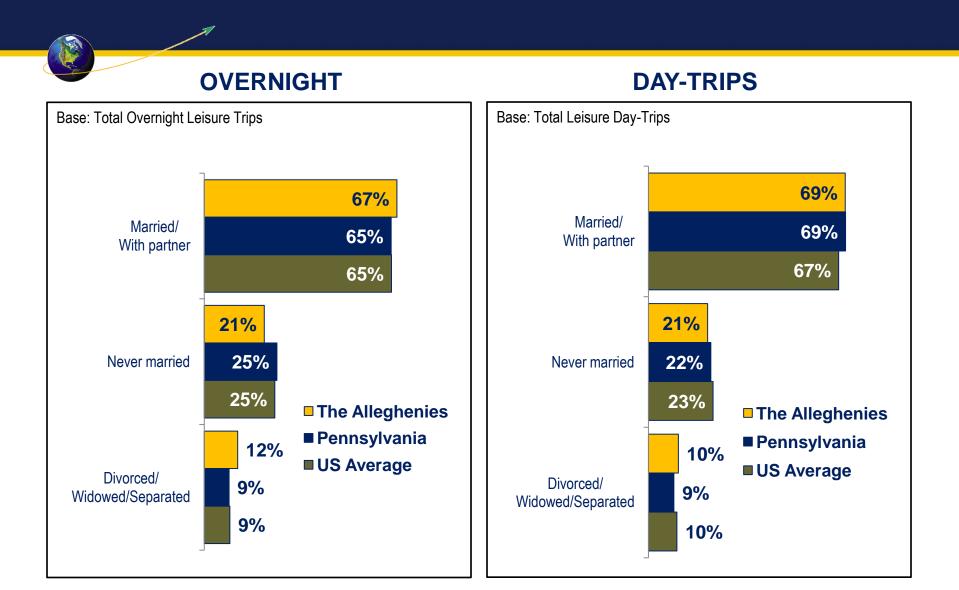
Age



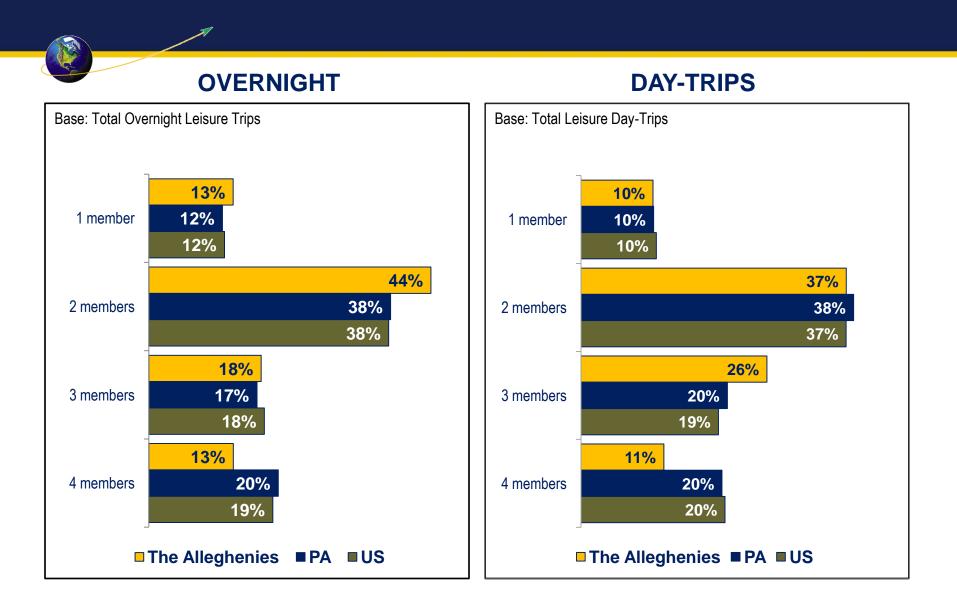
Race



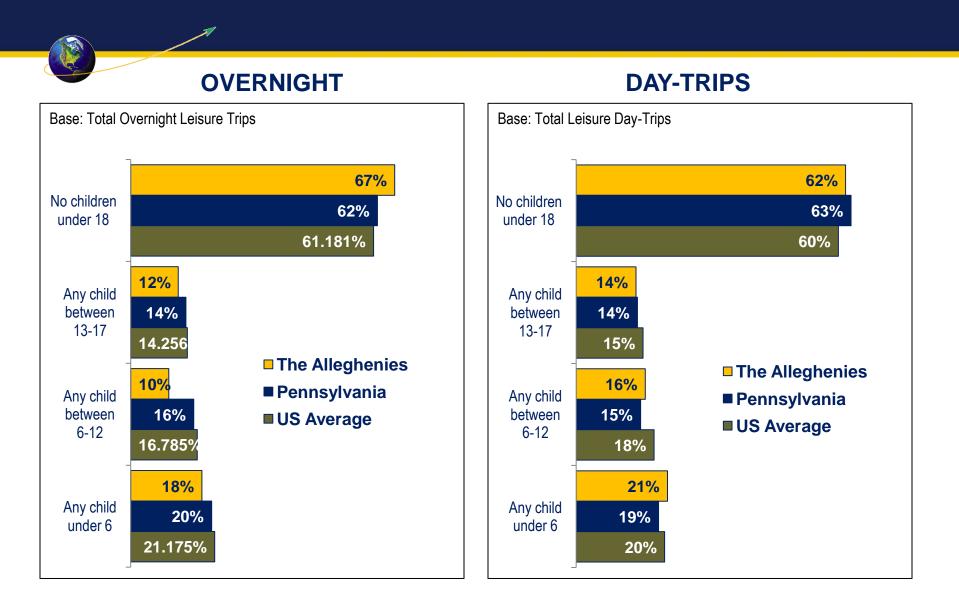
Marital Status



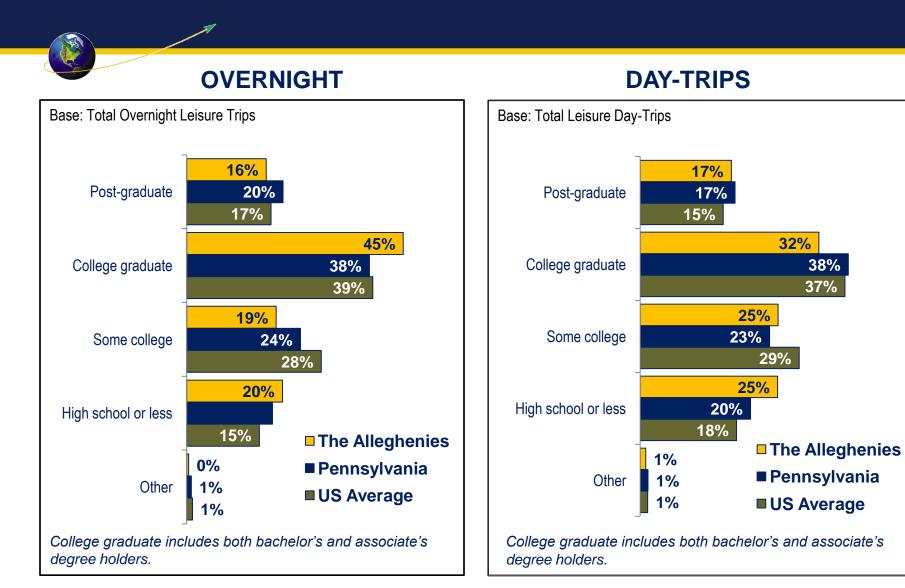
Household Size



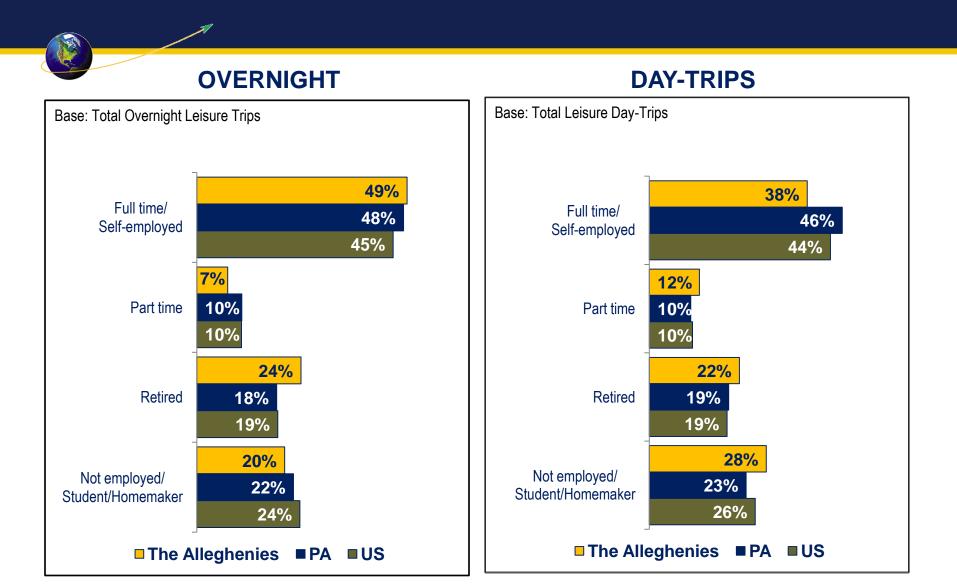
Children in Household



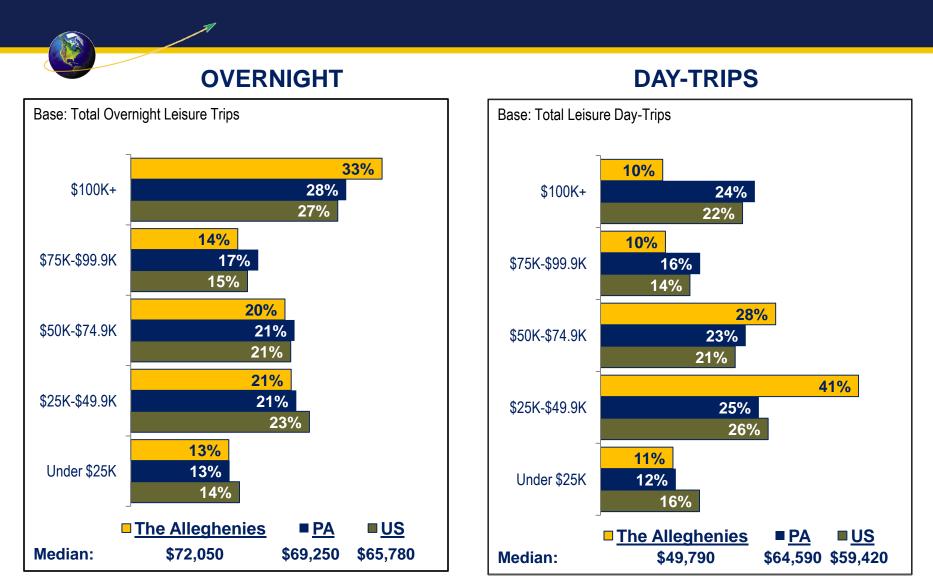
Education



Employment



Income



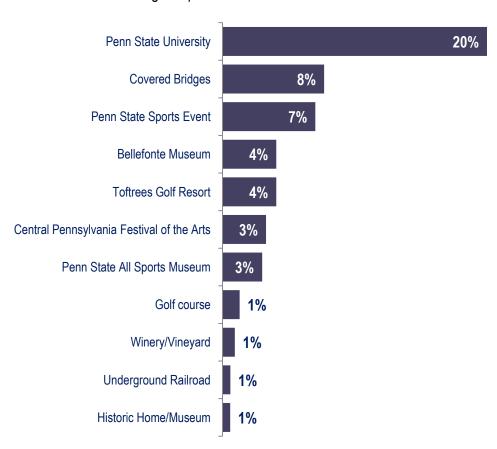


The Alleghenies Region

Attractions Visited — Overnight Trips

Attractions/Events Visited The Alleghenies Region*

Base: Total Overnight Trips



Attractions/Events Visited The Alleghenies Region*

Base: Total Overnight Trips

- Johnstown Inclined Plane	9%
Horseshoe Curve	9%
Gravity Hill	9%
Altoona Railroad Museum	7%
Johnstown Flood Museum/Memorial	6%
Old Bedford Village	5%
Bedford Springs	4%
Covered Bridges	4%
Winery/Vineyard	3%
Raystown Lake	3%
Lakemont Park	2%
Allegheny Portage Railroad National Historic Site	2%
Blue Knob State Park	2%
Historic Home/Museum	1%
Golf course	1%
Indian Caverns/Lincoln Caverns	1%
Penn's Cave & Wildlife Park	1%
Windber Coal Heritage Center	1%

*Remainder of Region



The Alleghenies Region

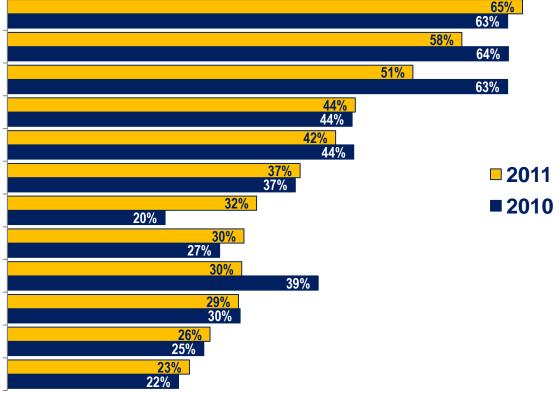
Importance of Factors In Choosing to Visit the Region

Importance of Factors In Choosing to Visit The Alleghenies Region

Base: Total Overnight Trips

% Rating Factor as Very Important*

Feeling safe at the destination Convenient access by car Having family or friends who live in the region Lots of things for adults to see and do Affordable attractions/events Availability of mid-range accommodations Unique or local food and cuisine A great rural/agricultural area Within a two-to-four-hour drive from home Within a two-hour drive from home Lots of things for children to see and do Lots of information about the destination on the Internet * Rated 8, 9 or 10 on 10-pt. Importance scale

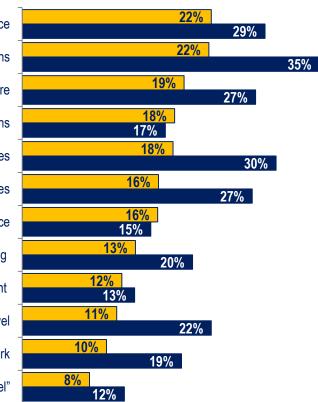


Importance of Factors In Choosing to Visit The Alleghenies Region (cont'd)

Base: Total Overnight Trips

% Rating Factor as Very Important*

Lots of historic things to see or experience Availability of economy or budget accommodations Being at a place I've never seen before Availability of luxury accommodations A fun place for couples Availability of camping or RV facilities Lots of cultural things to see or experience Great shopping A fun city environment Great opportunities for nature/eco-travel Different or unique local artwork/craftwork Focus on "green travel" * Rated 8, 9 or 10 on 10-pt. Importance scale



■ 2011 ■ 2010