2011 ANNUAL TRAVEL PROFILE
Laurel Highlands Region
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.
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.
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.
Laurel Highlands Region
Laurel Highlands 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*

- Philadelphia & The Countryside
- Dutch Country Roads
- Pittsburgh & Its Countryside
- Pocono Mountains
- Upstate PA
- Pennsylvania's Great Lakes
- Lehigh Valley
- Valleys of the Susquehanna
- The Alleghenies
- Pennsylvania Wilds
- Laurel Highlands

*Spent time in region
Sum of regions will exceed State total as a number of travelers visited more than one region.
Laurel Highlands Region
Main Reason for Trip
The proportion of overnight travelers visiting the Laurel Highlands region for marketable overnight leisure purposes in 2011 was slightly below the statewide average of 35%.
The Laurel Highlands region had the second highest proportion of day-trip travelers visiting the region for marketable (i.e., non-VFR leisure) purposes in 2011 and well above the 55% statewide average.
Laurel Highlands Region Origin Markets – Overnight
Main Origin States for Overnight Trips

Base: Total Overnight Trips

- Maryland: 17% (2011), 9% (2010)
- Virginia: 6% (2011), 4% (2010)
- Ohio: 5% (2011), 6% (2010)
- West Virginia: 5% (2011), 1% (2010)
- North Carolina: 3% (2011), 4% (2010)
- Florida: 2% (2011), 2% (2010)
- New Jersey: 3% (2011), 2% (2010)
Main Urban Markets for Overnight Trips

Base: Total Overnight Trips

**In-State DMAs**
- Pittsburgh: 24% (2011), 29% (2010)
- Philadelphia: 8% (2011), 6% (2010)
- Erie: 0% (2011), 3% (2010)

**Out-of-State DMAs**
- Cleveland, OH: 4% (2011), 4% (2010)
- Baltimore, MD: 3% (2011), 2% (2010)
Laurel Highlands Region
Origin Markets – Day-Trips
Main Origin States for Total Day-Trips

Base: Total Day-Trips

- Pennsylvania: 82% (2011), 86% (2010)
- West Virginia: 3% (2011), 2% (2010)
Main Urban Markets for Total Day-Trips

Base: Total Day-Trips

In-State DMAs

- Pittsburgh: 47% (2010), 58% (2011)
- Johnstown-Altoona: 19% (2010), 30% (2011)
- Philadelphia: <1% (2010), 2% (2011)
- Erie: 0% (2010), 2% (2011)

Out-of-State DMAs

- New York, NY/NJ/PA/CT: 4% (2010), 0% (2011)
- Washington, DC: 3% (2010), 4% (2011)
- Baltimore, MD: 2% (2010), 0% (2011)
Laurel Highlands Region
Traveler Profile
Gender

OVERNIGHT

Base: Total Overnight Trips

- Male:
  - Laurel Highlands: 47%
  - Pennsylvania: 47%
  - US Average: 47%
  - Total: 56%

- Female:
  - Laurel Highlands: 44%
  - Pennsylvania: 53%
  - US Average: 53%
  - Total: 53%

DAY-TRIPS

Base: Total Day-Trips

- Male:
  - Laurel Highlands: 39%
  - Pennsylvania: 44%
  - US Average: 46%
  - Total: 44%

- Female:
  - Laurel Highlands: 61%
  - Pennsylvania: 56%
  - US Average: 54%
  - Total: 56%
Marital Status

OVERNIGHT

Base: Total Overnight Trips

- Married/With partner: 71%
  - Laurel Highlands: 66%
  - Pennsylvania: 66%
  - US Average: 66%
- Never married: 18%
  - Laurel Highlands: 24%
  - Pennsylvania: 24%
  - US Average: 24%
- Divorced/Widowed/Separated: 9%
  - Laurel Highlands: 11%
  - Pennsylvania: 9%
  - US Average: 9%

DAY-TRIPS

Base: Total Day-Trips

- Married/With partner: 73%
  - Laurel Highlands: 69%
  - Pennsylvania: 67%
  - US Average: 67%
- Never married: 18%
  - Laurel Highlands: 22%
  - Pennsylvania: 22%
  - US Average: 22%
- Divorced/Widowed/Separated: 9%
  - Laurel Highlands: 9%
  - Pennsylvania: 9%
  - US Average: 10%
Household Size

**OVERNIGHT**

Base: Total Overnight Trips

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Laurel Highlands</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>2 members</td>
<td>12%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>3 members</td>
<td>12%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>4+ members</td>
<td>27%</td>
<td>33%</td>
<td>32%</td>
</tr>
</tbody>
</table>

**DAY-TRIPS**

Base: Total Day-Trips

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<th>Laurel Highlands</th>
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</thead>
<tbody>
<tr>
<td>1 member</td>
<td>10%</td>
<td>11%</td>
<td>36%</td>
</tr>
<tr>
<td>2 members</td>
<td>12%</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>3 members</td>
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<tr>
<td>4+ members</td>
<td>27%</td>
<td>19%</td>
<td>32%</td>
</tr>
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Laurel Highlands, PA, US
Children in Household

OVERNIGHT

Base: Total Overnight Trips

- No children under 18: 70%
- Any child between 13-17: 14%
- Any child between 6-12: 14%
- Any child under 6: 16%

Laurel Highlands: 62%
Pennsylvania: 61%
US Average: 61%

DAY-TRIPS

Base: Total Day-Trips

- No children under 18: 62%
- Any child between 13-17: 19%
- Any child between 6-12: 15%
- Any child under 6: 19%

Laurel Highlands: 63%
Pennsylvania: 61%
US Average: 61%
**Education**

### OVERNIGHT

**Base: Total Overnight Trips**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Laurel Highlands</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>24%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>College graduate</td>
<td></td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Some college</td>
<td>16%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>High school or less</td>
<td></td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>2%</td>
<td>14%</td>
</tr>
</tbody>
</table>

College graduate includes both bachelor’s and associate’s degree holders.

### DAY-TRIPS

**Base: Total Day-Trips**

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<th>Pennsylvania</th>
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<tr>
<td>Other</td>
<td></td>
<td>0%</td>
<td>1%</td>
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College graduate includes both bachelor’s and associate’s degree holders.
Income

OVERNIGHT

Base: Total Overnight Trips

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<th>Income Level</th>
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<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
<td>19%</td>
<td>32%</td>
<td>29%</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>20%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>16%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>20%</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Under $25K</td>
<td>18%</td>
<td>13%</td>
<td>12%</td>
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</tbody>
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Median: $59,380 $73,280 $68,690

DAY-TRIPS

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<tr>
<td>Under $25K</td>
<td>12%</td>
<td>16%</td>
<td>12%</td>
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</table>

Median: $60,750 $66,030 $59,790
Laurel Highlands Region

Attractions Visited — Overnight and Day-Trips
Attractions/Events Visited
Laurel Highlands Region

Base: Total Overnight Trips

- Winery/Vineyard: 16%
- Seven Springs: 16%
- Uniontown: 16%
- Historic House/Museum: 13%
- Shanksville/Stony Creek/Flight 93 Memorial: 13%
- Fallingwater/Frank Lloyd Wright House: 9%
- Connellsville: 9%
- Meyersdale: 7%
- Nemacolin: 7%
- Underground Railroad: 6%
- Ohiopyle/Ohiopyle State Park: 6%
- Other Frank Lloyd Wright Houses: 6%
- Friendship Hill National Historic Site: 6%
- Fort Ligonier: 5%
- Bushy Run Battlefield: 3%
- Fort Necessity National Battlefield: 3%
- Golf course: 2%
Laurel Highlands Region

Importance of Factors in Choosing to Visit Region
Importance of Factors In Choosing to Visit Laurel Highlands Region

Base: Total Overnight Trips

- Feeling safe at the destination: 71% (2011), 62% (2010)
- Convenient access by car: 50% (2011), 52% (2010)
- Having family or friends who live in the region: 44% (2011), 54% (2010)
- Lots of things for adults to see and do: 36% (2011), 45% (2010)
- Affordable attractions/events: 31% (2011), 37% (2010)
- A great rural/agricultural area: 33% (2011), 37% (2010)
- Availability of mid-range accommodations: 36% (2011), 36% (2010)
- Unique or local food and cuisine: 30% (2011), 35% (2010)
- Lots of historic things to see or experience: 33% (2011), 31% (2010)
- Being at a place I've never seen before: 33% (2011), 31% (2010)
- Availability of economy or budget accommodations: 29% (2011), 33% (2010)
- Availability of luxury accommodations: 17% (2011), 31% (2010)
Importance of Factors In Choosing to Visit Laurel Highlands Region

<table>
<thead>
<tr>
<th>Factor</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within a two-hour drive from home</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>A fun place for couples</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Lots of things for children to see and do</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Within a two-to-four-hour drive from home</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Focus on “green travel”</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Great shopping</td>
<td>16%</td>
<td>18%</td>
</tr>
</tbody>
</table>