2011 ANNUAL TRAVEL PROFILE
The Alleghenies 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.
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.
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
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

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

- Visiting Friends/Relatives: 34%
- Marketable: 53%
- Business: 9%
- Business-Leisure: 3%

Base: Total Day-Trips
The Alleghenies Region
Main Origin Markets – Overnight Trips
Main Origin States for Overnight Leisure Trips

- Maryland: 10% (2011), 10% (2010)
- Virginia: 8% (2011), 3% (2010)
- Ohio: 5% (2011), 10% (2010)
- Florida: 3% (2011), 4% (2010)
Main Urban Markets for Overnight Leisure Trips

Base: Total Overnight Leisure Trips

In-State DMAs

- Philadelphia
  - 2011: 12%
  - 2010: 9%
- Pittsburgh
  - 2011: 11%
  - 2010: 16%
- Erie
  - 2011: 5%
  - 2010: 5%
- Johnstown-Altoona
  - 2011: 3%
  - 2010: 5%
- Harrisburg-Lancaster-Lebanon-York
  - 2011: 4%
  - 2010: 8%

Out-of-State DMAs

- Washington, DC
  - 2011: 12%
  - 2010: 10%
- New York, NY/NJ/PA/CT
  - 2011: 6%
  - 2010: 5%
- Youngstown, OH
  - 2011: 3%
  - 2010: 3%
- Detroit, MI
  - 2011: 3%
  - 2010: 2%
- Baltimore, MD
  - 2011: 2%
  - 2010: 2%
The Alleghenies Region
Main Origin Markets – Day-Trips
Main Origin States for Leisure Day-Trips

Base: Total Leisure Day-Trips

- Pennsylvania: 72% (2011), 75% (2010)
- Maryland: 10% (2011), 4% (2010)
- Florida: 3% (2011), 0% (2010)
- New York: 3% (2011), 5% (2010)
Main Urban Markets for Leisure Day-Trips

**Base: Total Leisure Day-Trips**

### In-State DMAs
- **Pittsburgh**: 22% (2011), 34% (2010)
- **Johnstown-Altoona**: 13% (2011), 21% (2010)
- **Erie**: 3% (2011), 9% (2010)

### Out-of-State DMAs
- **Wilkes Barre-Scranton**: 7% (2011), 10% (2010)
- **Philadelphia**: 3% (2011), 8% (2010)
- **Washington, DC**: 9% (2011), 7% (2010)
- **Cleveland, OH**: 5% (2011), 2% (2010)
The Alleghenies Region
Traveler Profile
Gender

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th></th>
<th>The Alleghenies</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>44%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Female</td>
<td>56%</td>
<td>55%</td>
<td>55%</td>
</tr>
</tbody>
</table>

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
<thead>
<tr>
<th></th>
<th>The Alleghenies</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>38%</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Female</td>
<td>62%</td>
<td>57%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Race

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- Caucasian: The Alleghenies 94%, Pennsylvania 88%, US Average 83%
- African-American: The Alleghenies 4%, Pennsylvania 6%, US Average 8%
- Other: The Alleghenies 1%, Pennsylvania 5%, US Average 8%

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- Caucasian: The Alleghenies 95%, Pennsylvania 89%, US Average 83%
- African-American: The Alleghenies 3%, Pennsylvania 6%, US Average 8%
- Other: The Alleghenies 5%, Pennsylvania 5%, US Average 8%
Marital Status

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- Married/With partner: 67% (65% for Pennsylvania, 65% for US Average)
- Never married: 21% (25% for Pennsylvania, 25% for US Average)
- Divorced/Widowed/Separated: 12% (9% for Pennsylvania, 9% for US Average)

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- Married/With partner: 69% (69% for Pennsylvania, 67% for US Average)
- Never married: 21% (22% for Pennsylvania, 23% for US Average)
- Divorced/Widowed/Separated: 10% (9% for Pennsylvania, 10% for US Average)
Household Size

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Household Size</th>
<th>The Alleghenies</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>2 members</td>
<td>18%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>3 members</td>
<td>17%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>4 members</td>
<td>13%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
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<th>Household Size</th>
<th>The Alleghenies</th>
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<tbody>
<tr>
<td>1 member</td>
<td>10%</td>
<td>10%</td>
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</tr>
<tr>
<td>2 members</td>
<td>10%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>3 members</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>4 members</td>
<td>11%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Children in Household

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- No children under 18: 67%
- Any child between 13-17: 12%
- Any child between 6-12: 10%
- Any child under 6: 18%

- The Alleghenies: 62%
- Pennsylvania: 62%
- US Average: 61.181%

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- No children under 18: 62%
- Any child between 13-17: 14%
- Any child between 6-12: 16%
- Any child under 6: 20%

- The Alleghenies: 63%
- Pennsylvania: 63%
- US Average: 60%

The Alleghenies
Pennsylvania
US Average
Education

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Education Level</th>
<th>The Alleghenies</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate</td>
<td>16%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>College graduate</td>
<td>38%</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>Some college</td>
<td>24%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>High school or less</td>
<td>20%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
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<td>38%</td>
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<td>1%</td>
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</table>

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

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- **Full time/ Self-employed**: 49% (48% PA, 45% US)
- **Part time**: 7% (10% PA, 10% US)
- **Retired**: 24% (18% PA, 19% US)
- **Not employed/ Student/Homemaker**: 20% (22% PA, 24% US)

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- **Full time/ Self-employed**: 38% (46% PA, 44% US)
- **Part time**: 12% (10% PA, 10% US)
- **Retired**: 22% (19% PA, 19% US)
- **Not employed/ Student/Homemaker**: 28% (23% PA, 26% US)

The Alleghenies PA US
Income

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>The Alleghenies</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
<td>28%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>14%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>20%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>21%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Under $25K</td>
<td>13%</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

Median: $72,050 $69,250 $65,780

DAY-TRIPS

Base: Total Leisure Day-Trips

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<td>25%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Under $25K</td>
<td>11%</td>
<td>12%</td>
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Median: $49,790 $64,590 $59,420
The Alleghenies Region

Attractions Visited
— Overnight Trips
Attractions/Events Visited The Alleghenies Region*

Base: Total Overnight Trips

- Penn State University: 20%
- Covered Bridges: 8%
- Penn State Sports Event: 7%
- Bellefonte Museum: 4%
- Toftrees Golf Resort: 4%
- Central Pennsylvania Festival of the Arts: 3%
- Penn State All Sports Museum: 3%
- Golf course: 1%
- Winery/Vineyard: 1%
- Underground Railroad: 1%
- Historic Home/Museum: 1%

*State College Area
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: 65% (2011) vs. 63% (2010)
- Convenient access by car: 58% (2011) vs. 58% (2010)
- Having family or friends who live in the region: 51% (2011) vs. 64% (2010)
- Lots of things for adults to see and do: 44% (2011) vs. 44% (2010)
- Affordable attractions/events: 42% (2011) vs. 44% (2010)
- Availability of mid-range accommodations: 44% (2011) vs. 37% (2010)
- Unique or local food and cuisine: 32% (2011) vs. 37% (2010)
- A great rural/agricultural area: 20% (2011) vs. 27% (2010)
- Within a two-to-four-hour drive from home: 30% (2011) vs. 39% (2010)
- Within a two-hour drive from home: 29% (2011) vs. 30% (2010)
- Lots of things for children to see and do: 26% (2011) vs. 23% (2010)
- Lots of information about the destination on the Internet: 23% (2011) vs. 22% (2010)

* Rated 8, 9 or 10 on 10-pt. Importance scale
Importance of Factors In Choosing to Visit The Alleghenies Region (cont’d)

% Rating Factor as Very Important*

- Lots of historic things to see or experience
  - 2011: 22%
  - 2010: 29%
- Availability of economy or budget accommodations
  - 2011: 22%
  - 2010: 35%
- Being at a place I’ve never seen before
  - 2011: 19%
  - 2010: 27%
- Availability of luxury accommodations
  - 2011: 18%
  - 2010: 17%
- A fun place for couples
  - 2011: 18%
  - 2010: 30%
- Availability of camping or RV facilities
  - 2011: 16%
  - 2010: 27%
- Lots of cultural things to see or experience
  - 2011: 16%
  - 2010: 15%
- Great shopping
  - 2011: 13%
  - 2010: 20%
- A fun city environment
  - 2011: 12%
  - 2010: 13%
- Great opportunities for nature/eco-travel
  - 2011: 11%
  - 2010: 22%
- Different or unique local artwork/craftwork
  - 2011: 10%
  - 2010: 19%
- Focus on “green travel”
  - 2011: 8%
  - 2010: 12%

* Rated 8, 9 or 10 on 10-pt. Importance scale