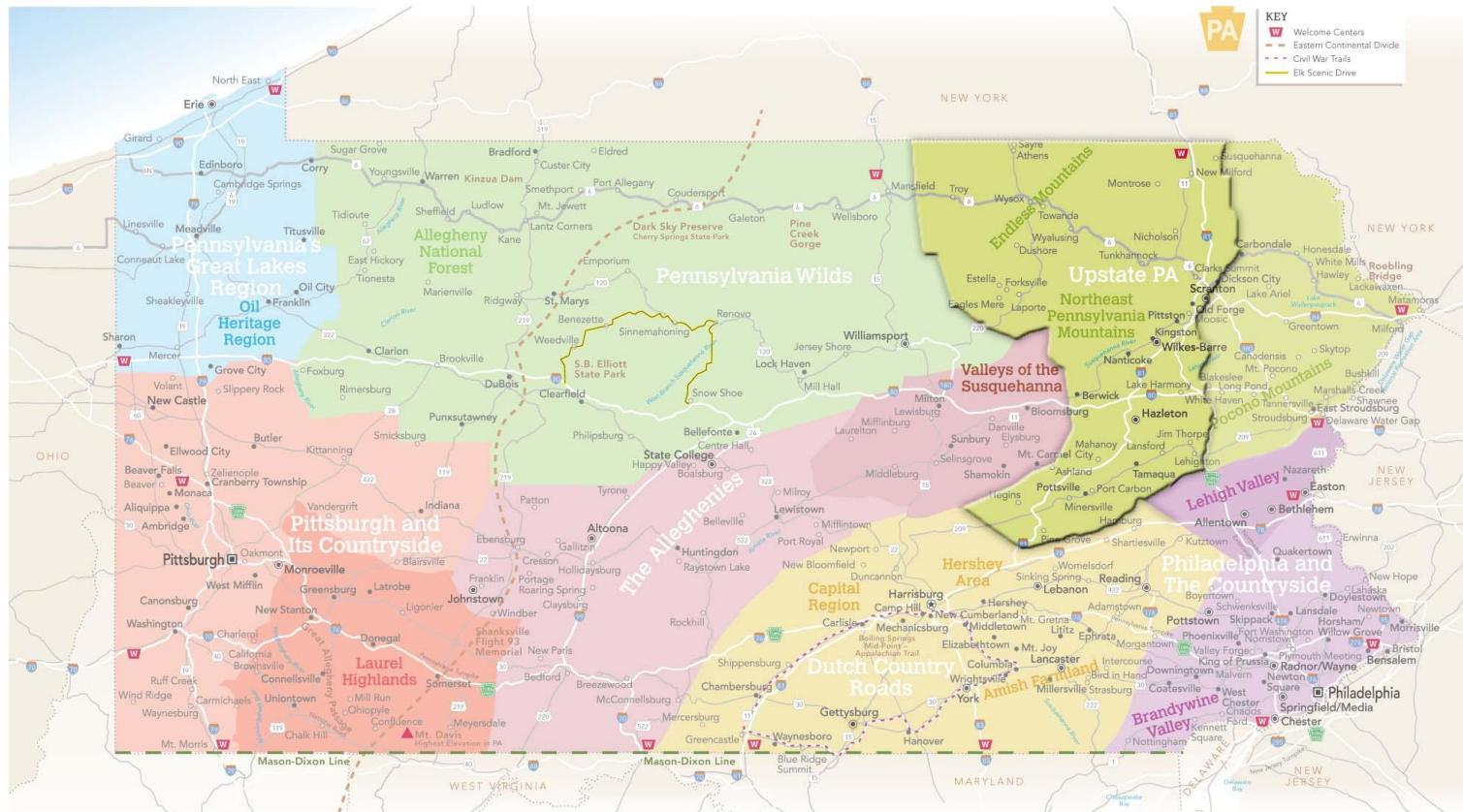


2011 ANNUAL TRAVEL PROFILE

Upstate PA Region

Upstate PA Region – Excluding Pocono Mountains Subregion



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.

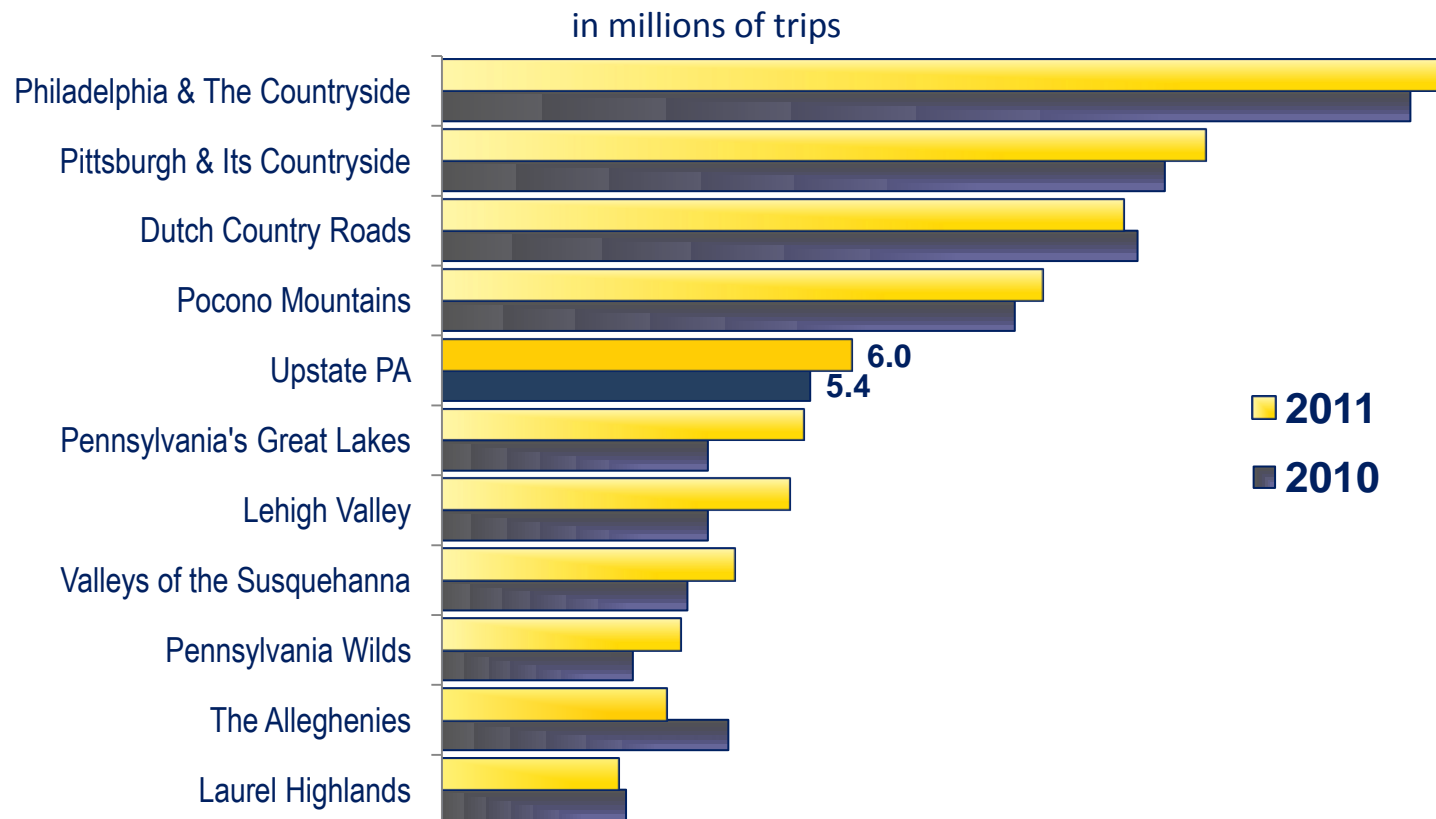
Research Methodology (cont'd)



- 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.

Upstate PA Region Visitor Volume

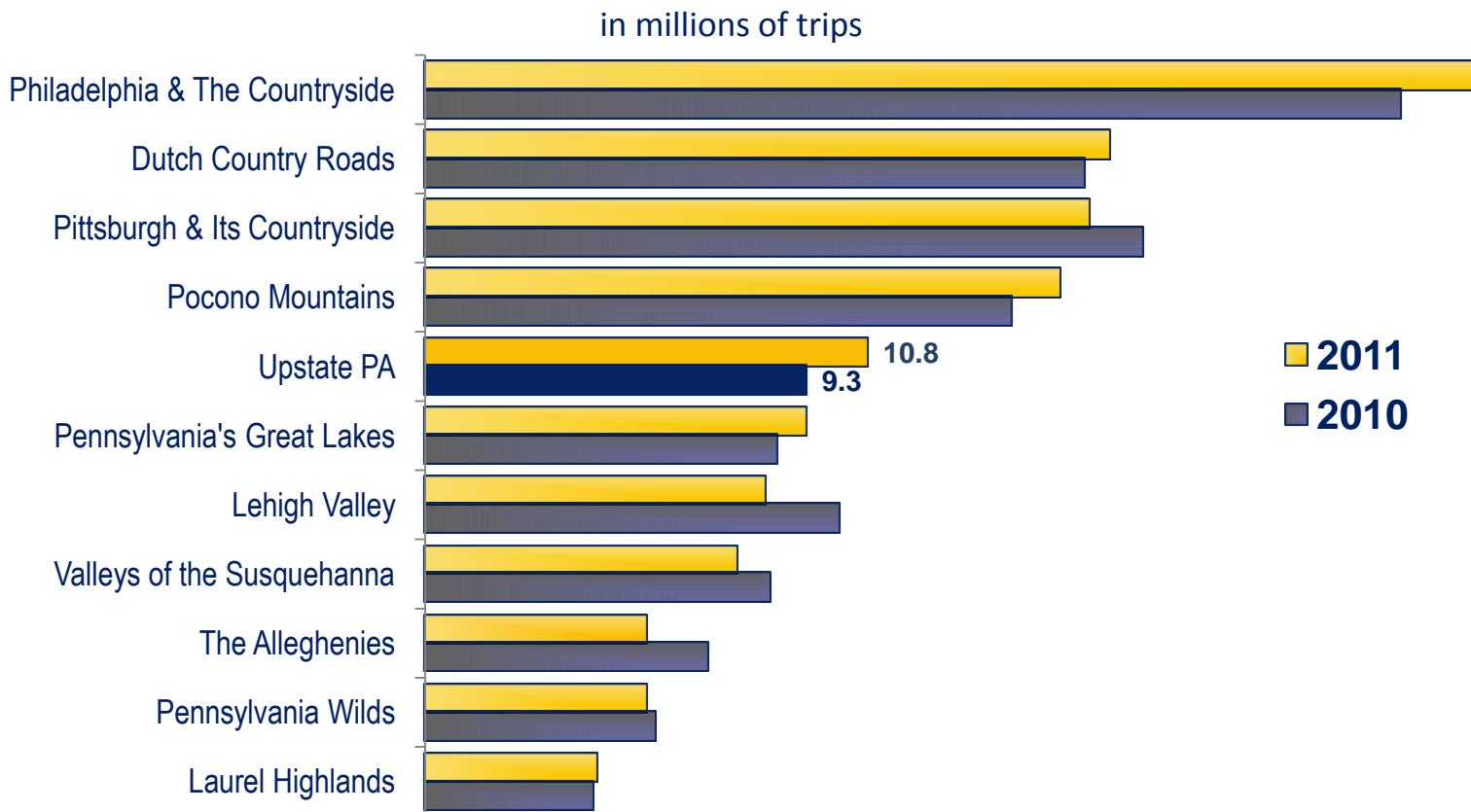
Regions Visited on Overnight Trips*



*Spent time in region

Sum of 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.

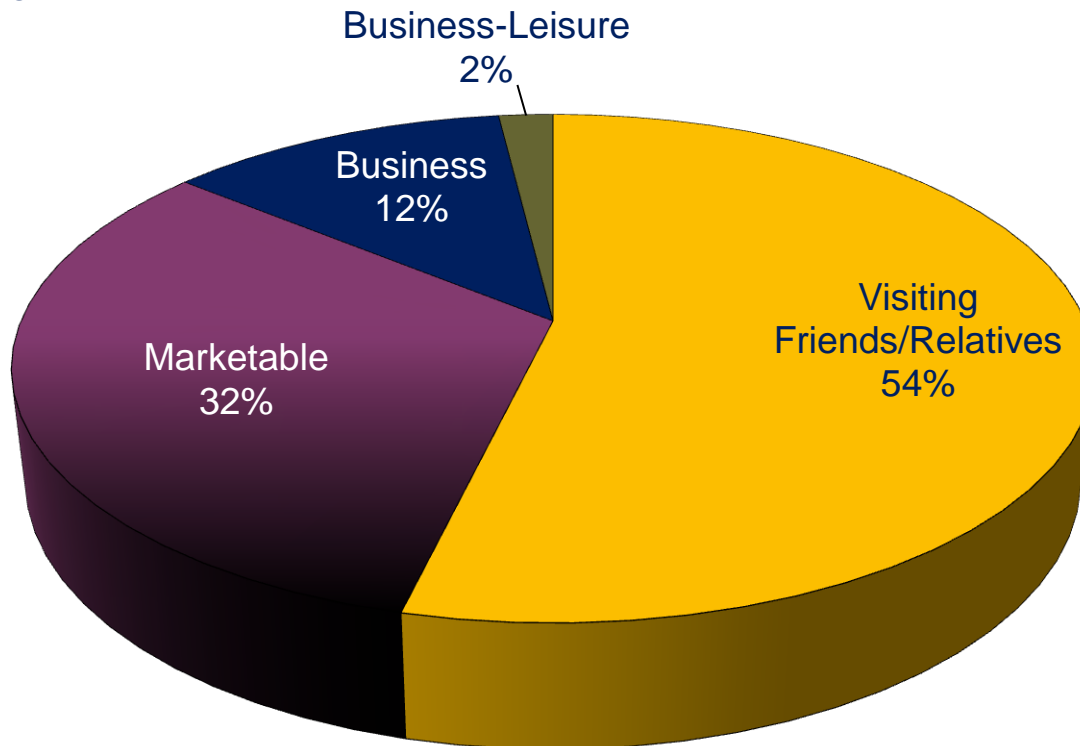
Upstate PA Region Main Reason for Trip

Main Reason for Overnight Trip



Base: Total Overnight Trips

The Upstate PA region had the 5th highest proportion of overnight travelers visiting the region for business purposes and to visit friends/relatives in 2011 among the state's 11 tourism regions.

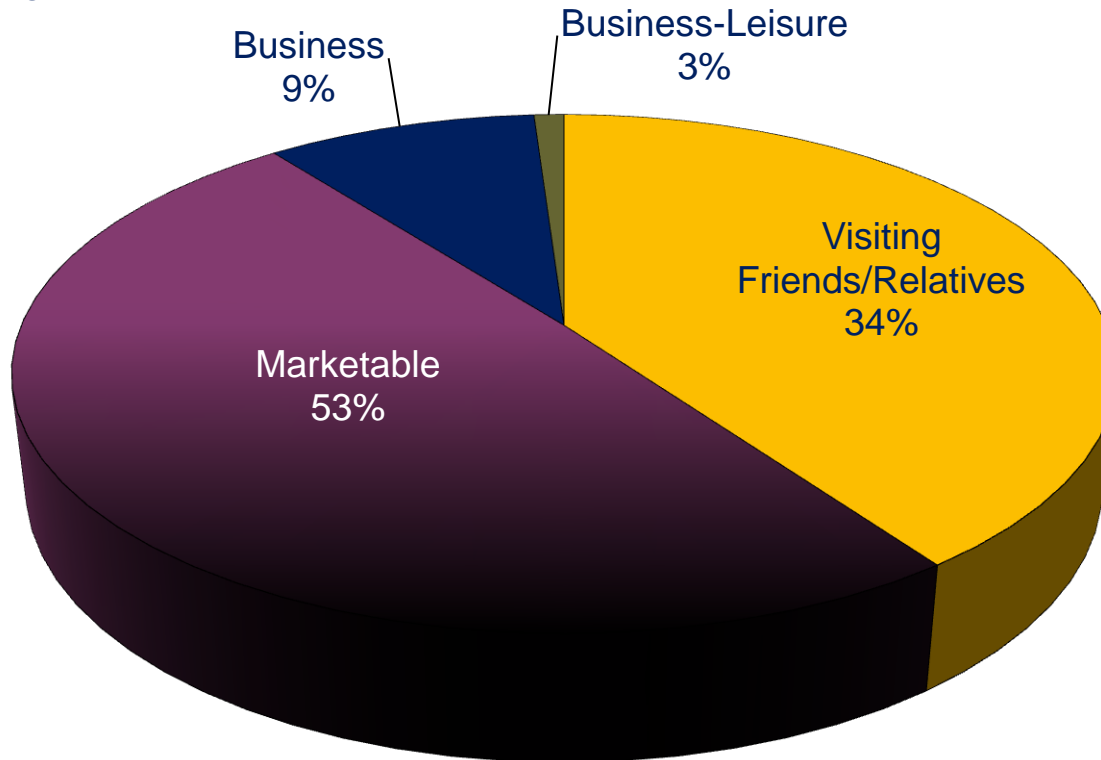


Main Reason for Day-Trip



Base: Total Day-Trips

The Upstate PA region had the highest proportion of travelers visiting the region to visit friends/relatives and the 4th highest proportion for business purposes among the state's 11 tourism regions in 2011.

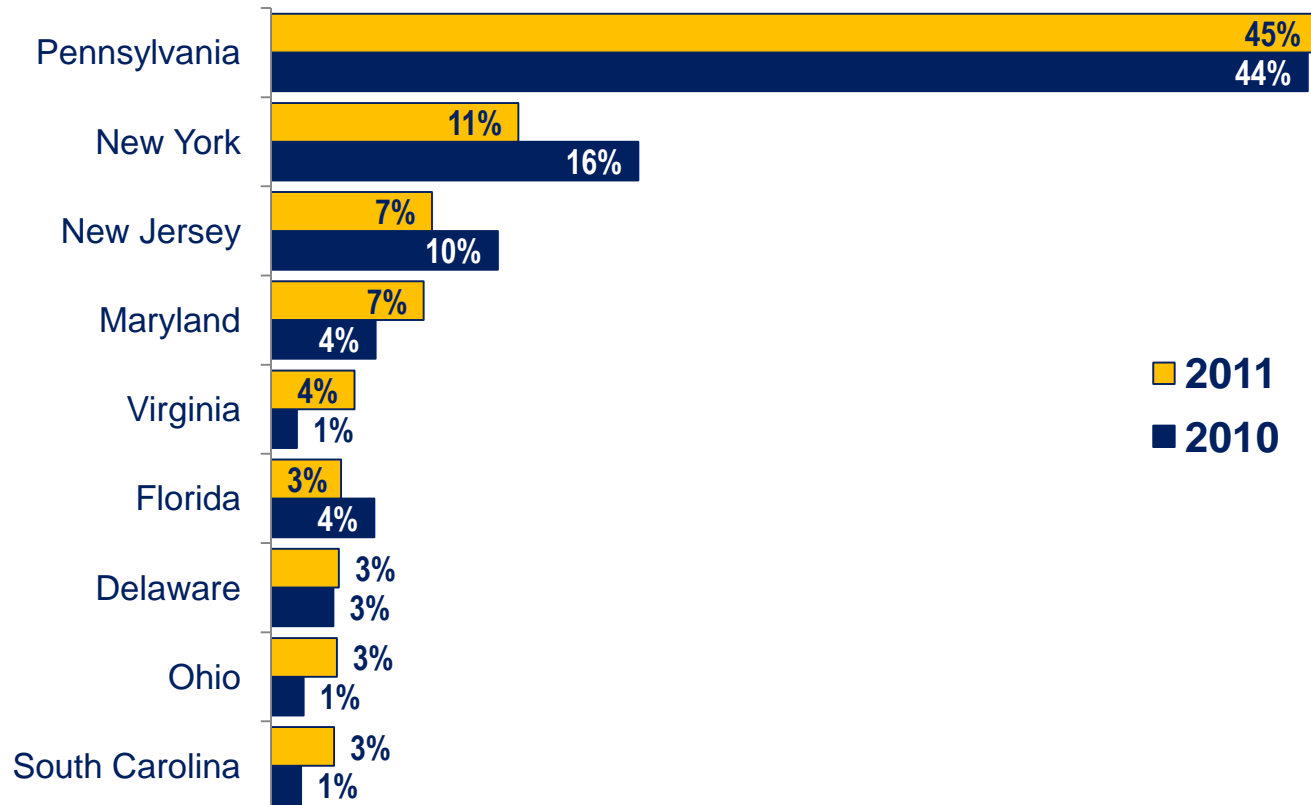


**Upstate PA Region
Main Origin Markets – Overnight Trips**

Main Origin States for Overnight Leisure Trips



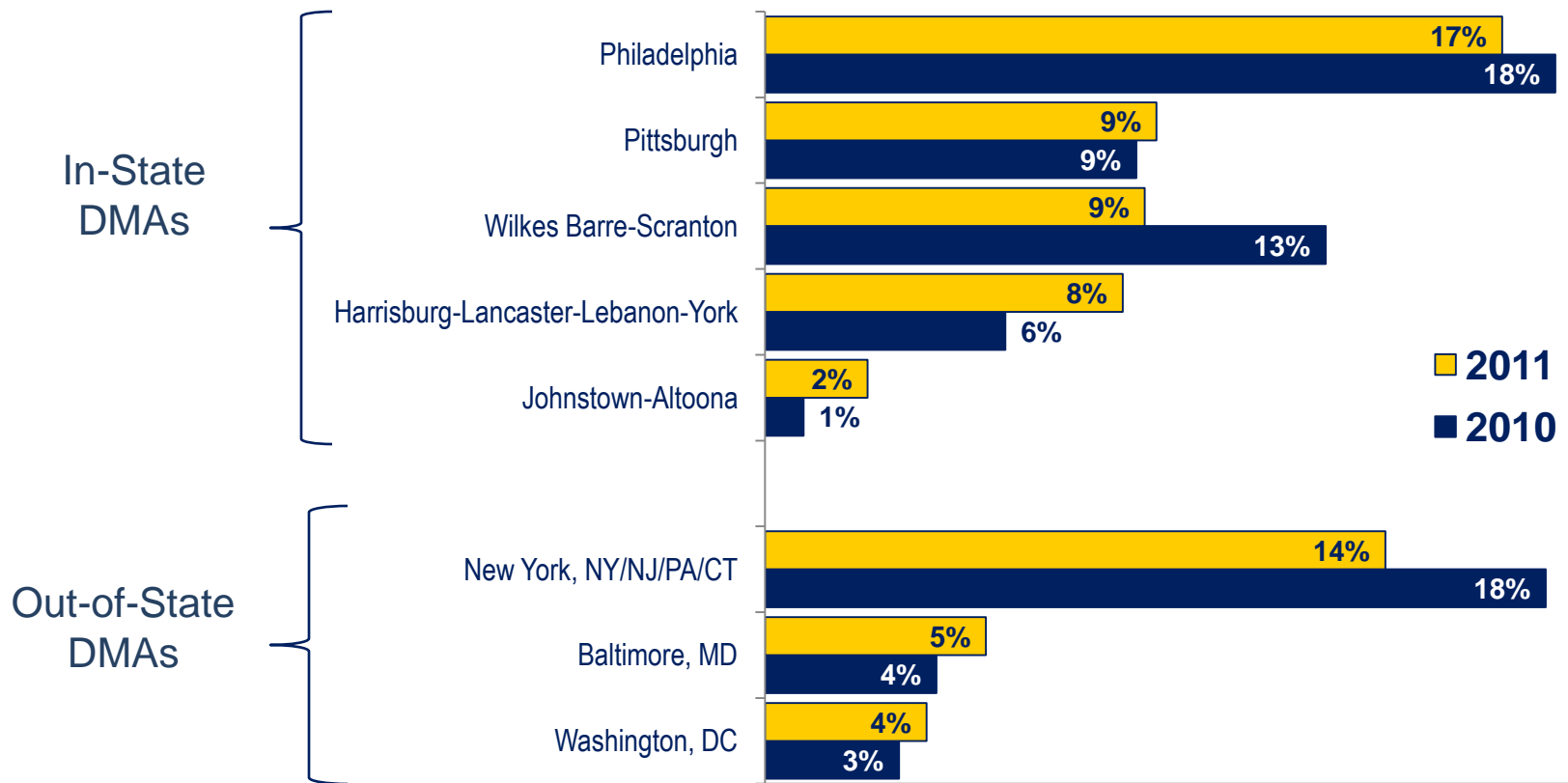
Base: Total Overnight Leisure Trips



Main Urban Markets for Overnight Leisure Trips



Base: Total Overnight Leisure Trips

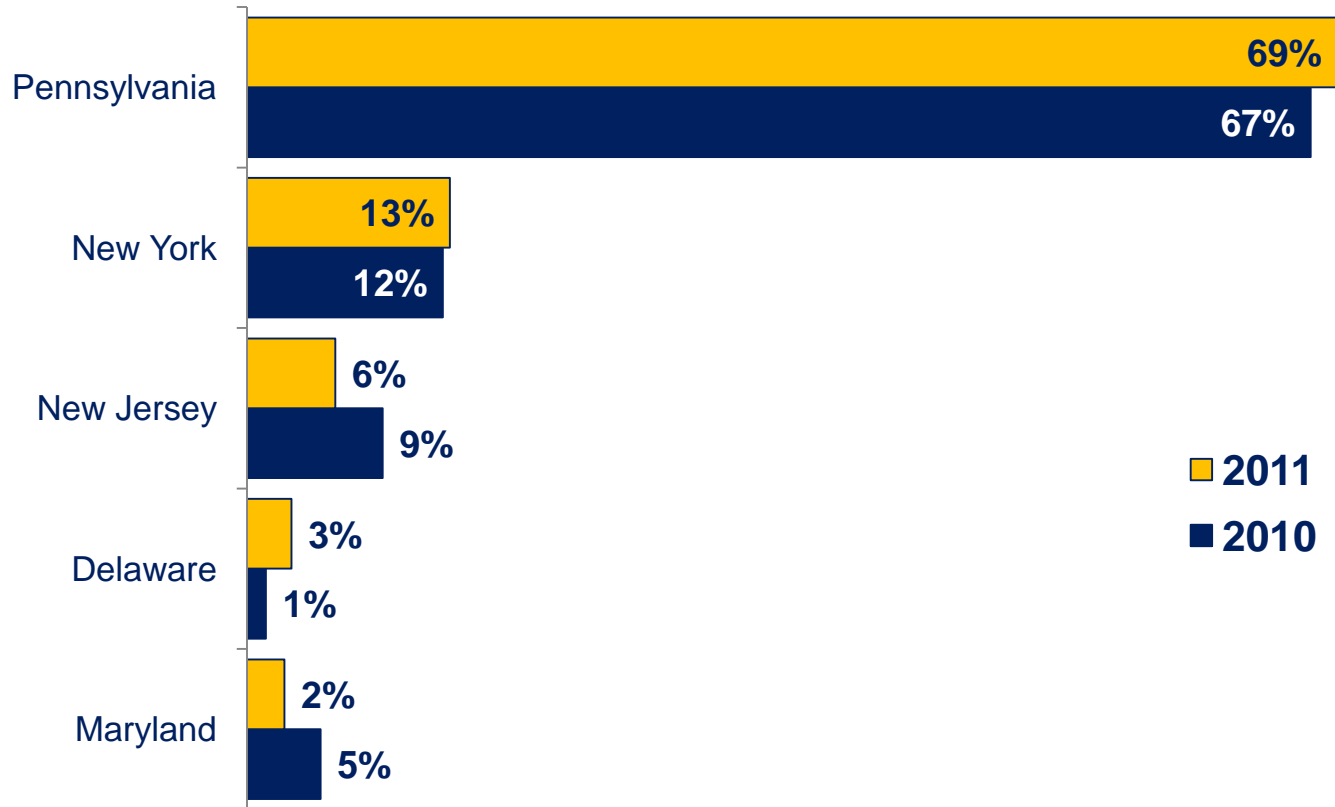


**Upstate PA Region
Main Origin Markets – Day-Trips**

Main Origin States for Leisure Day-Trips



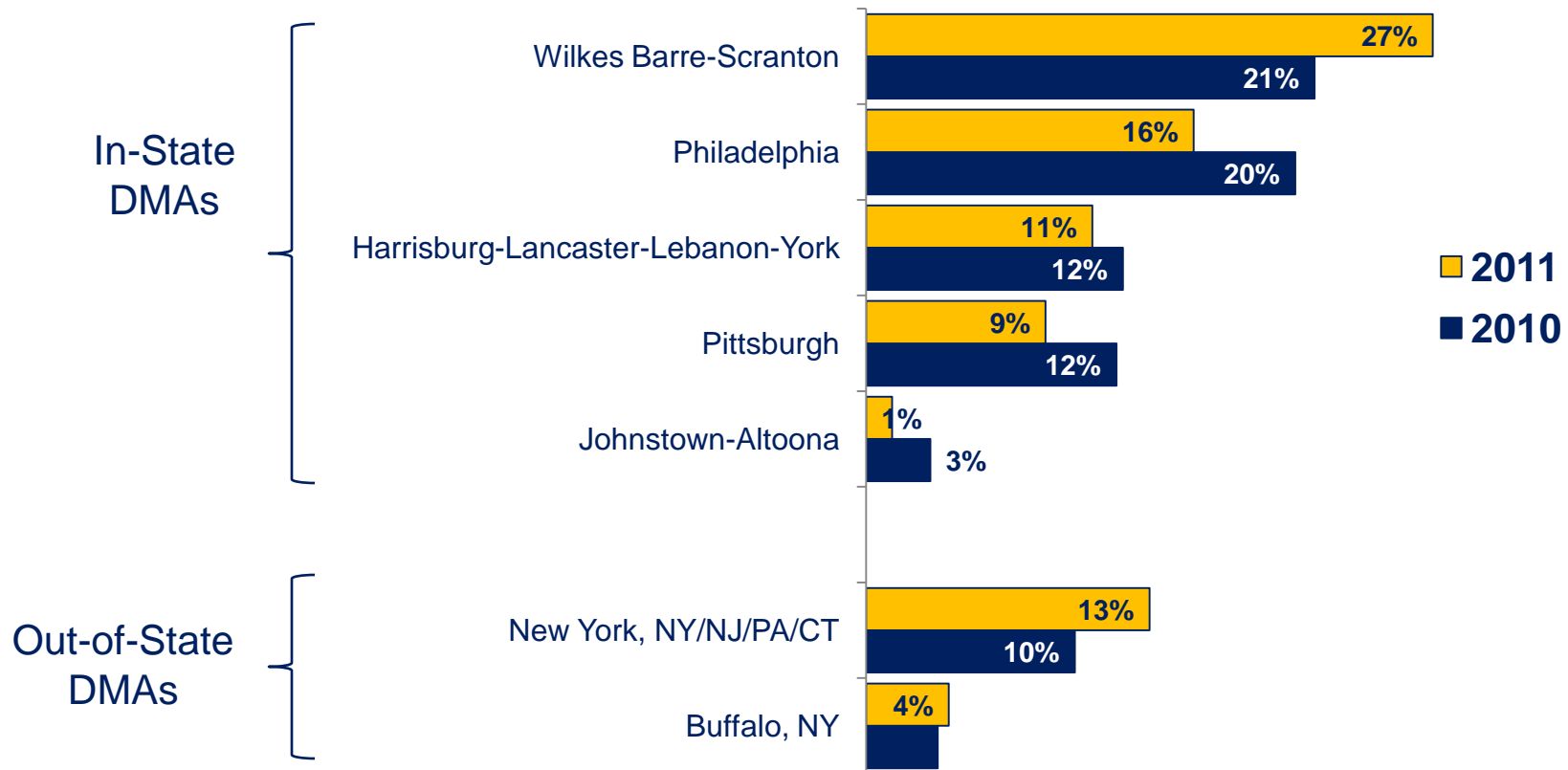
Base: Total Leisure Day-Trips



Main Urban Markets for Leisure Day-Trips



Base: Total Leisure Day-Trips



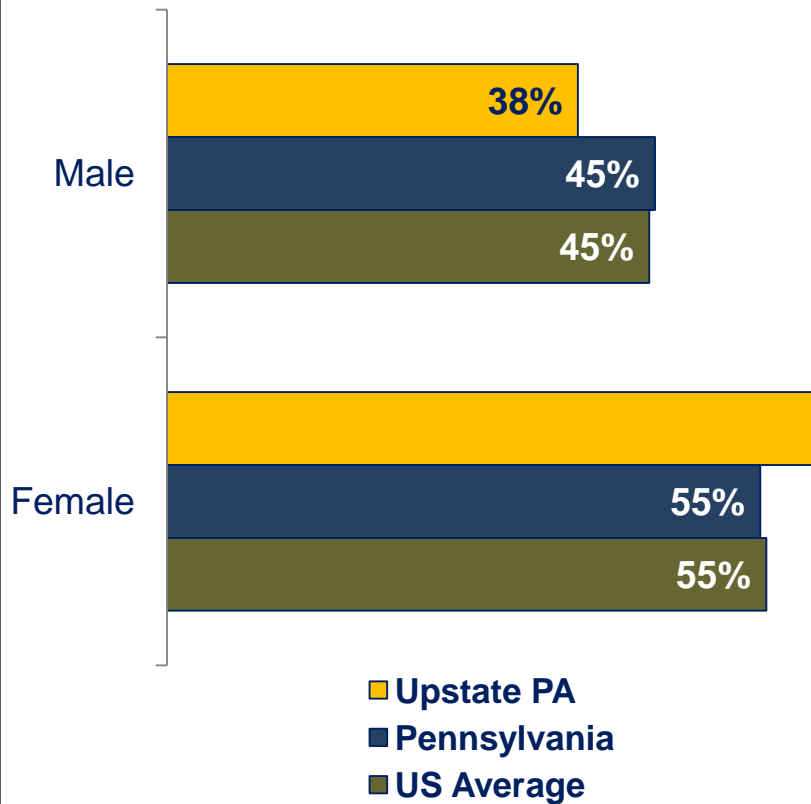
Upstate PA Region Traveler Profile

Gender



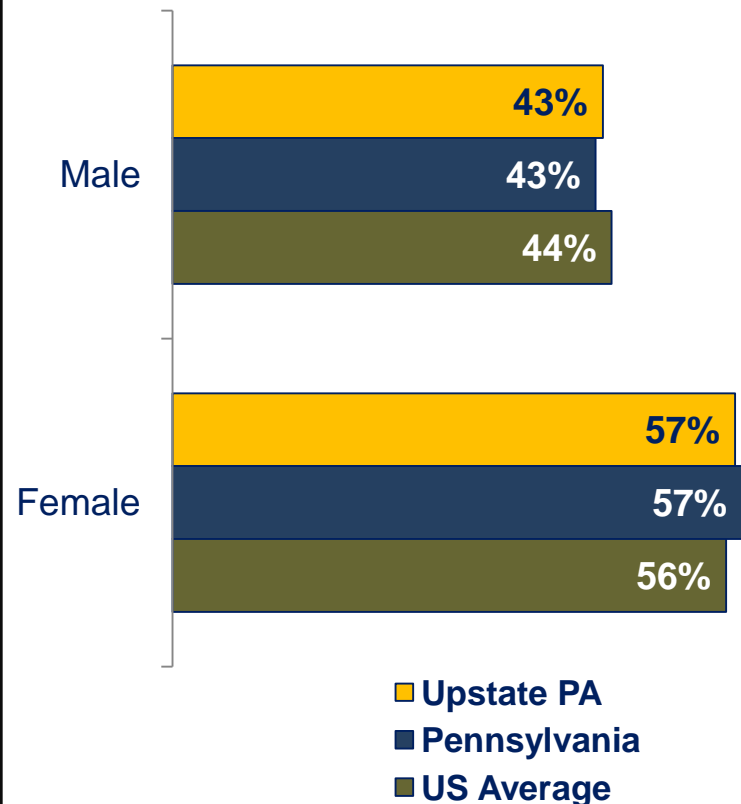
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

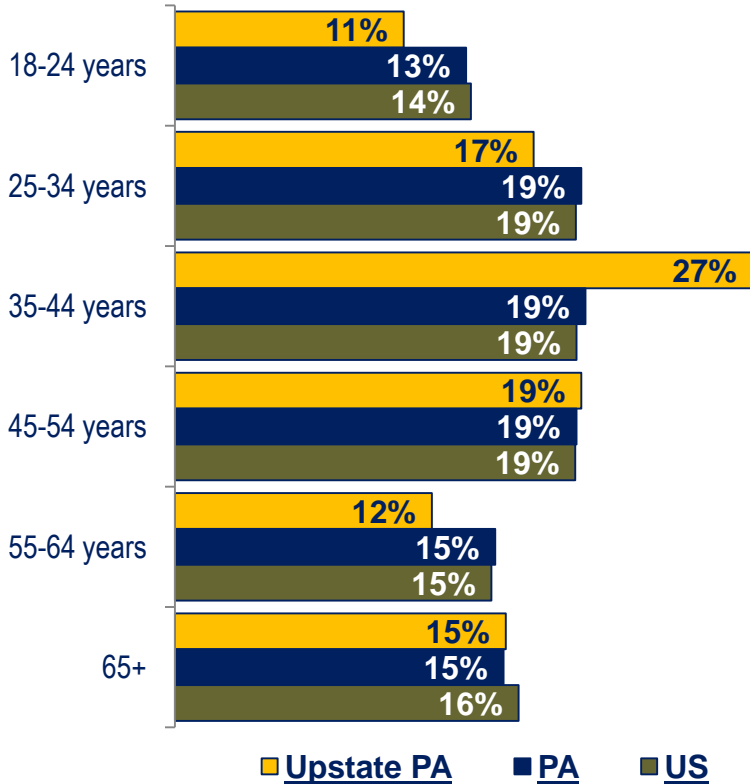


Age



OVERNIGHT

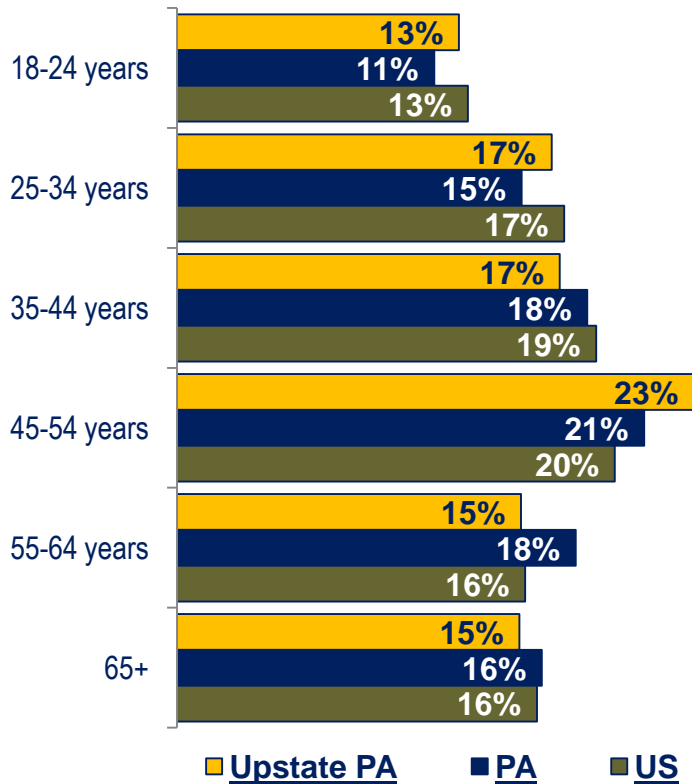
Base: Total Overnight Leisure Trips



Median Age: 44.1 44.4 44.5

DAY-TRIPS

Base: Total Leisure Day-Trips



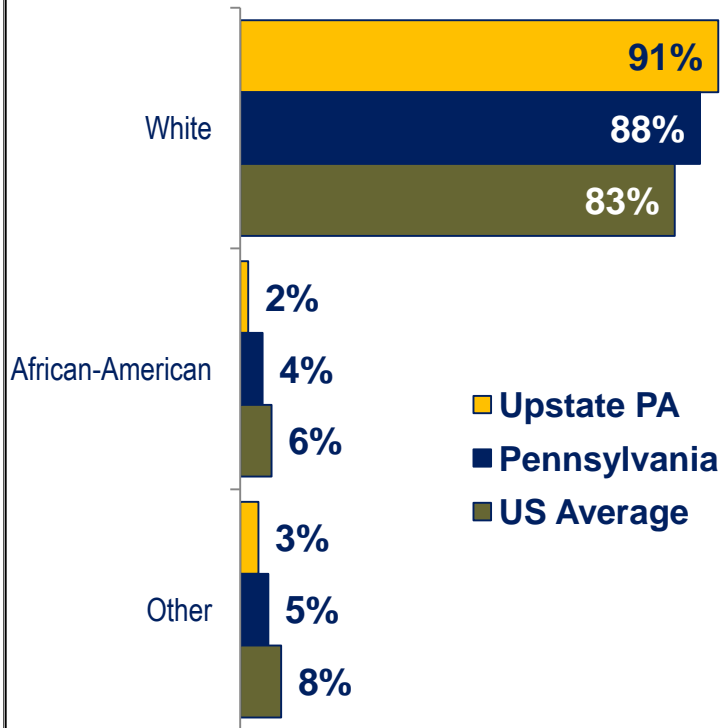
Median Age: 46.1 47.2 45.5

Race



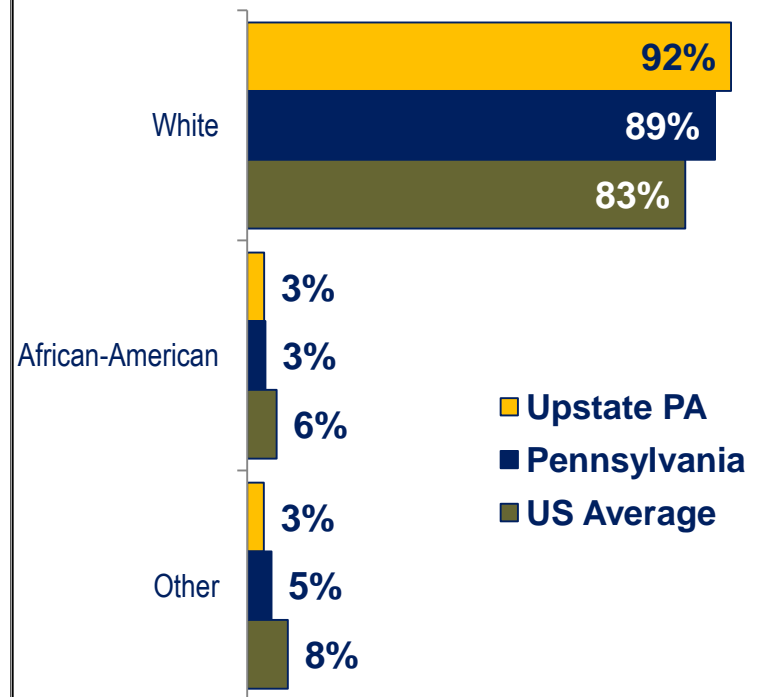
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

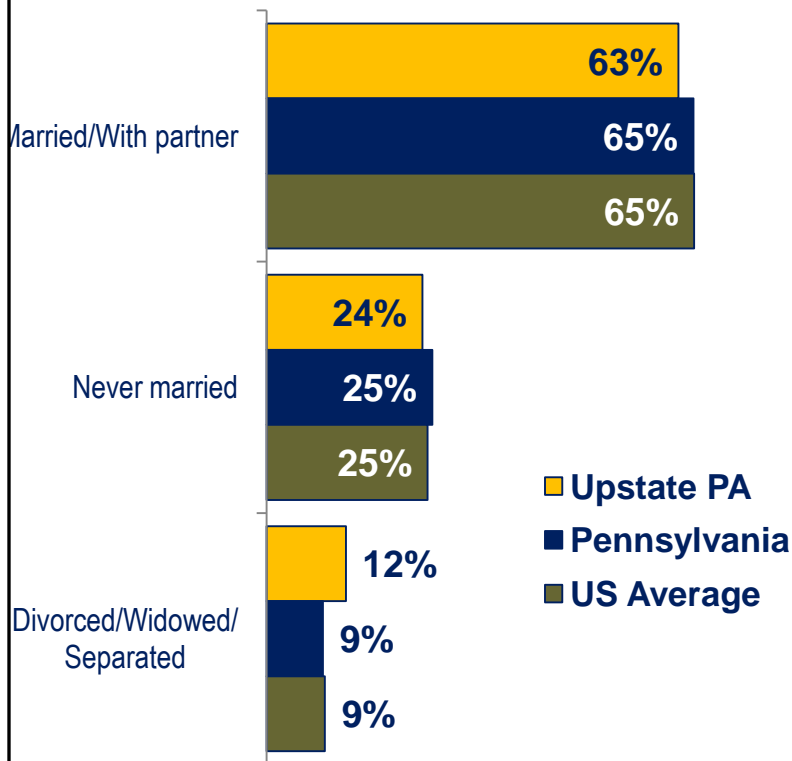


Marital Status



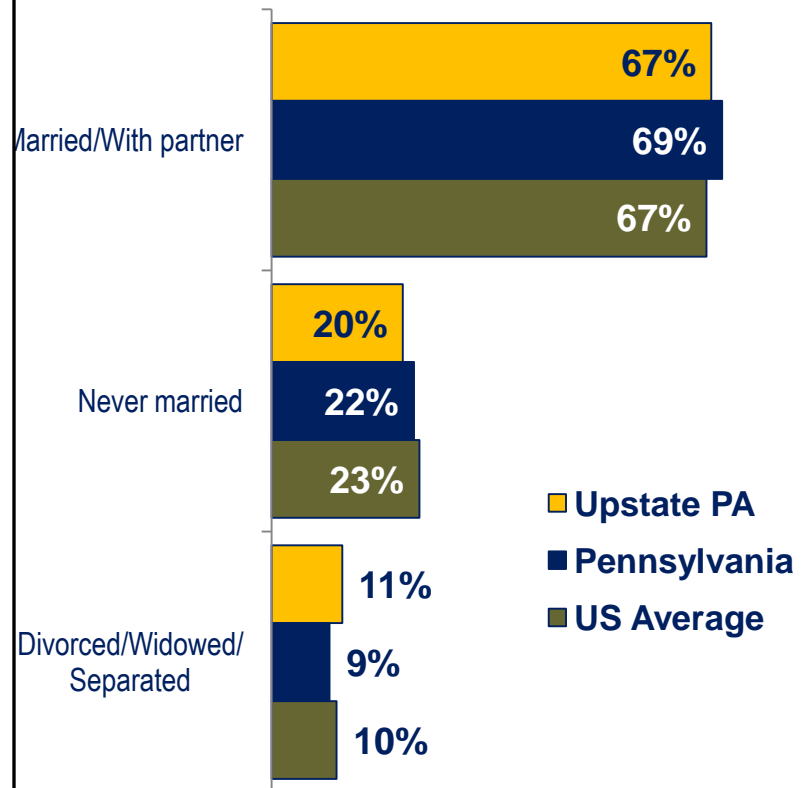
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

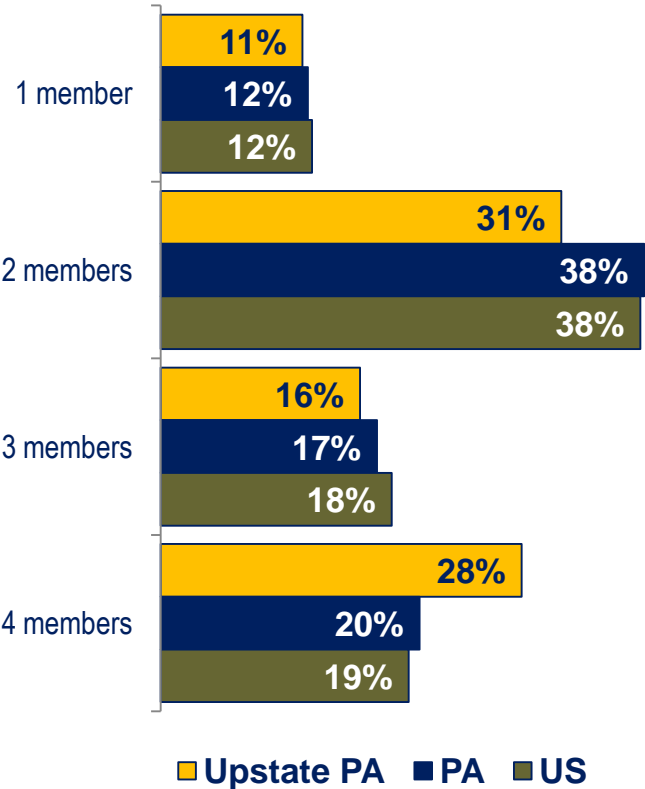


Household Size



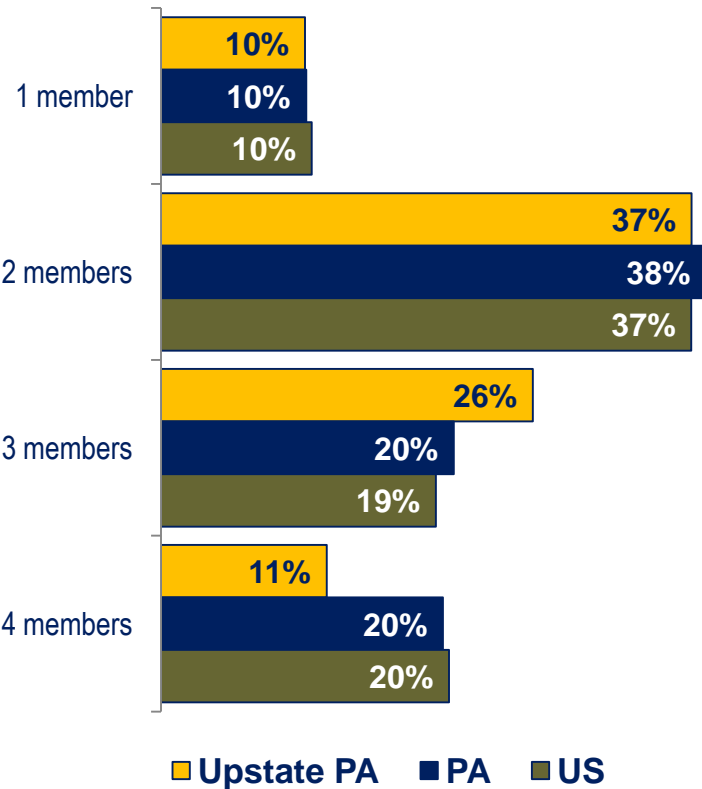
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

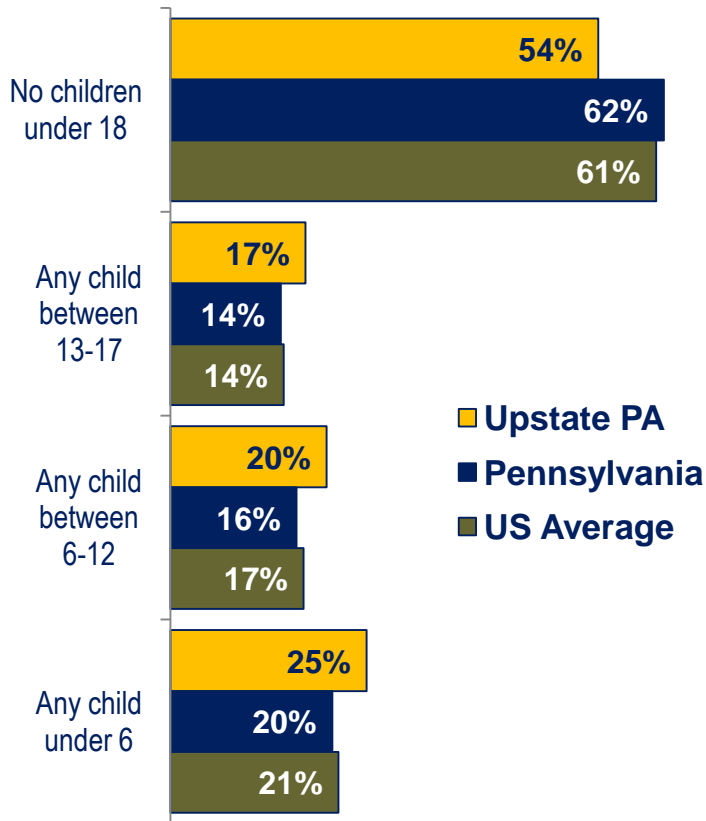


Children in Household



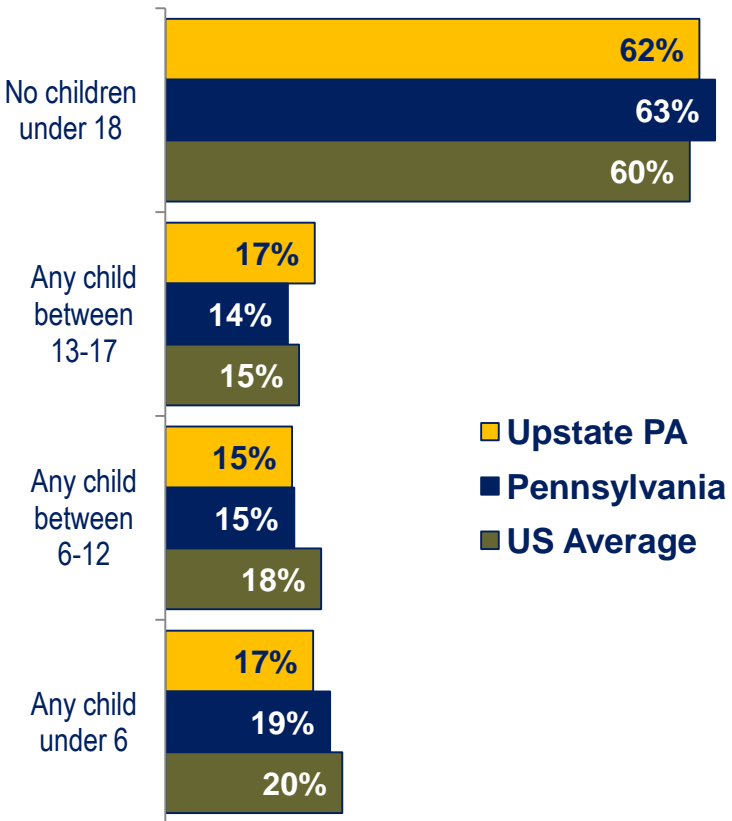
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

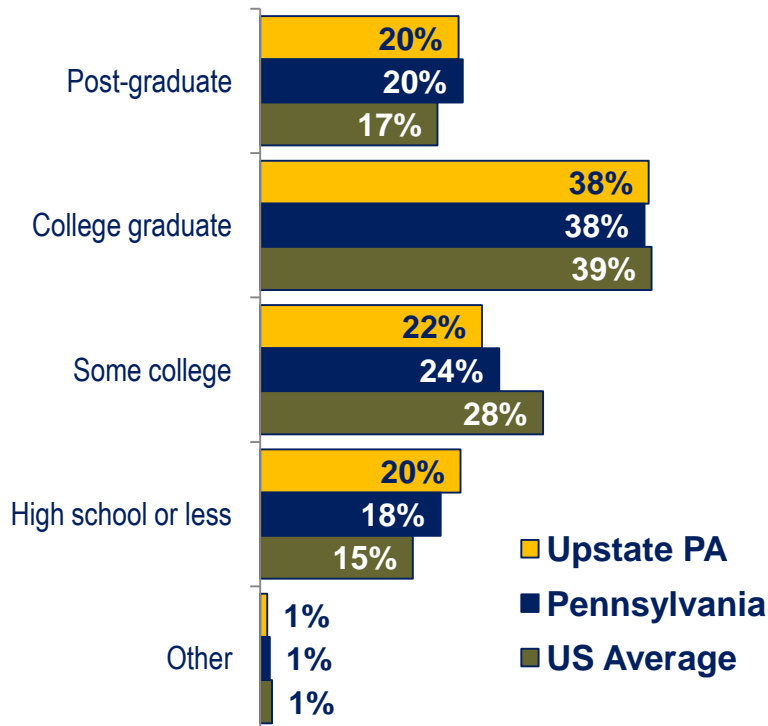


Education



OVERNIGHT

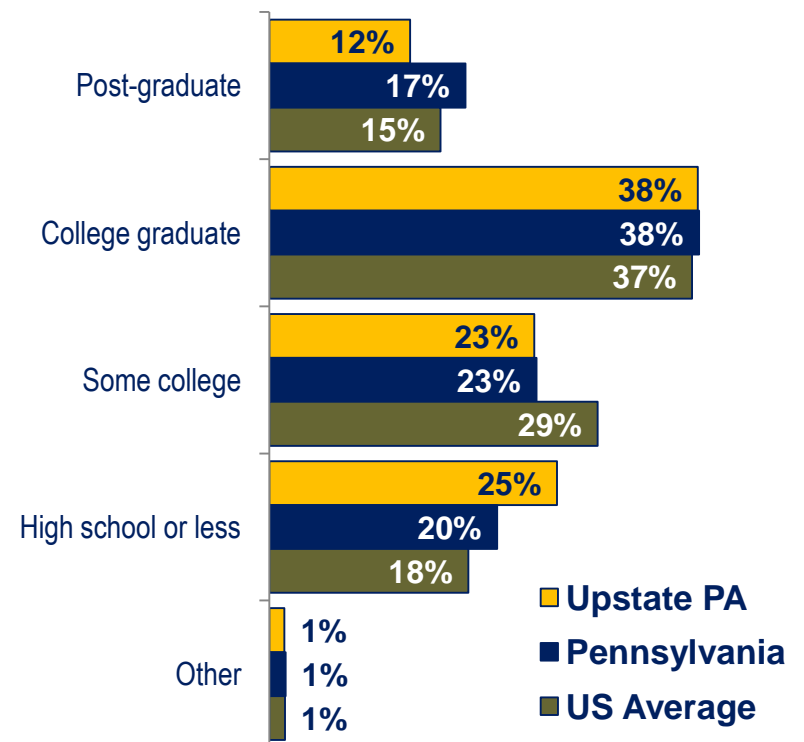
Base: Total Overnight Leisure Trips



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

DAY-TRIPS

Base: Total Leisure Day-Trips



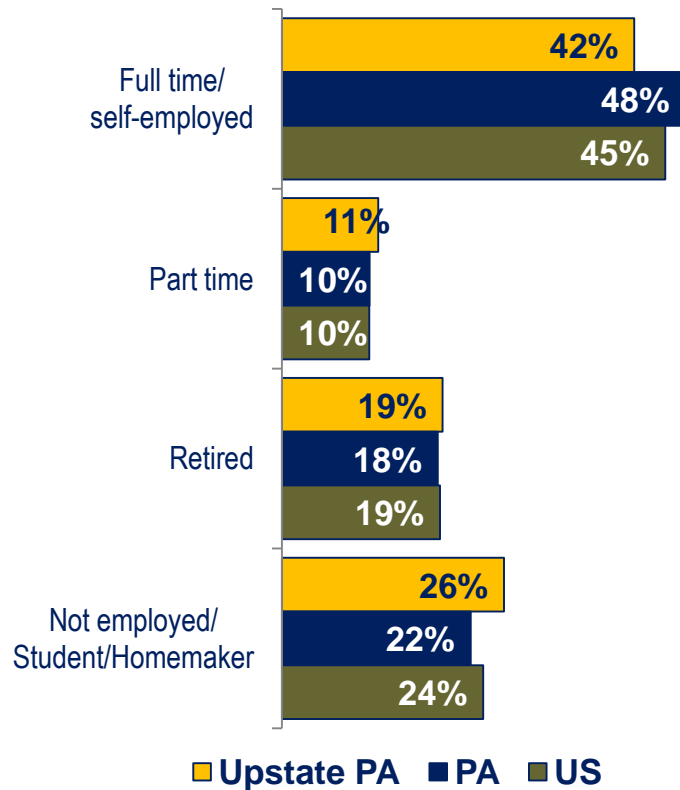
College graduate includes both bachelor's and associate's degree holders.

Employment



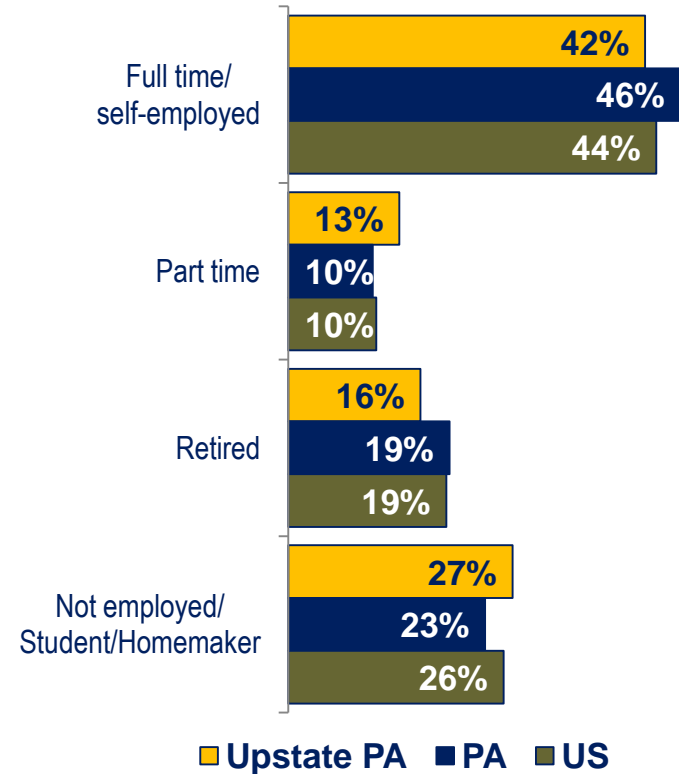
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips

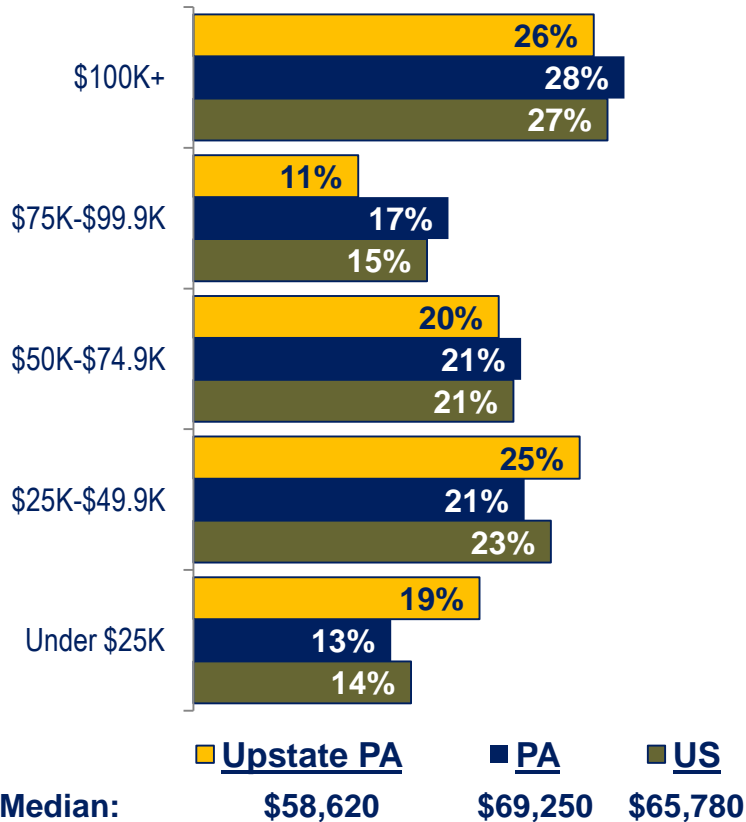


Income



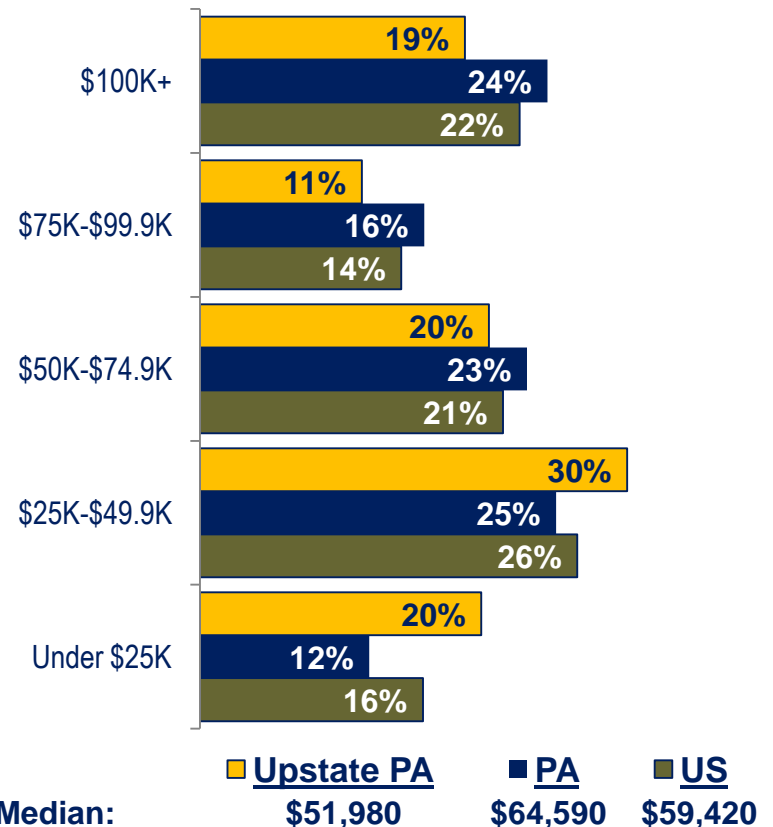
OVERNIGHT

Base: Total Overnight Leisure Trips



DAY-TRIPS

Base: Total Leisure Day-Trips



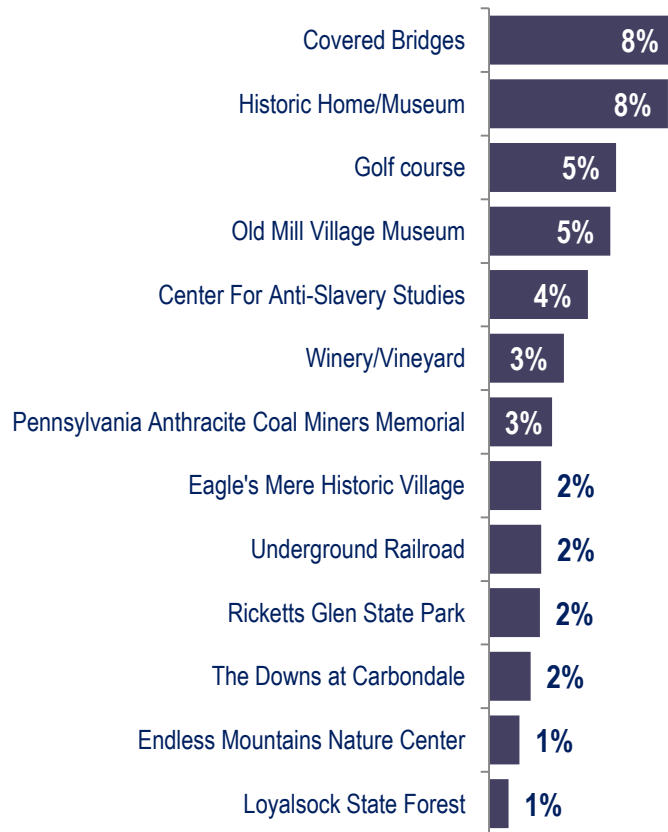
Upstate PA Region

Attractions Visited — Overnight Trips

Attractions/Events Visited Upstate PA Region*



Base: Overnight Trips

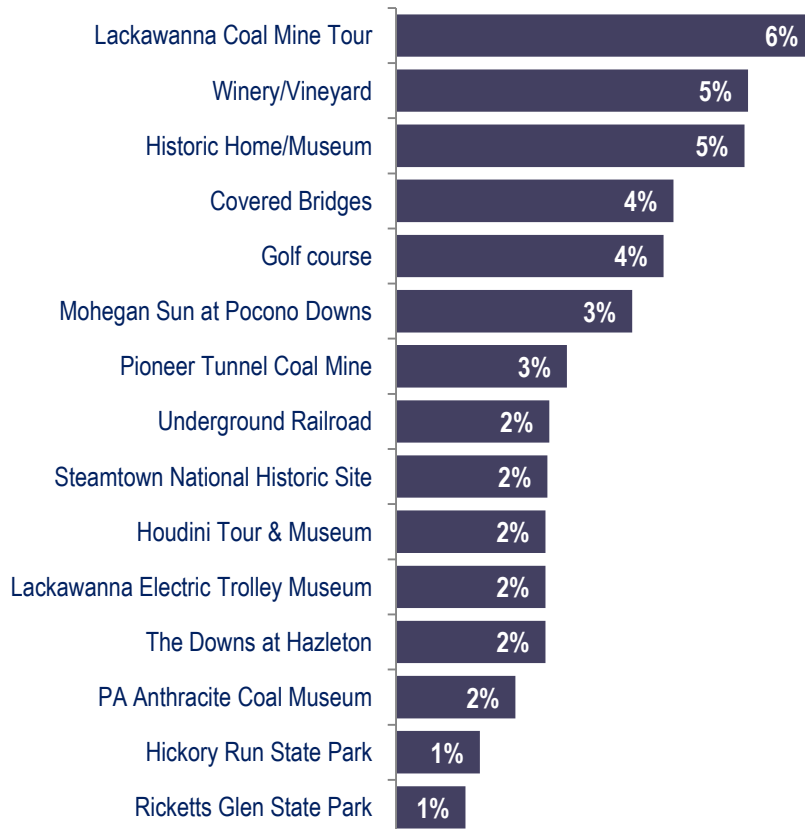


*Endless Mountains area

Attractions/Events Visited Upstate PA Region*



Base: Overnight Trips



*Wilkes-Barre/Scranton area

Upstate PA Region

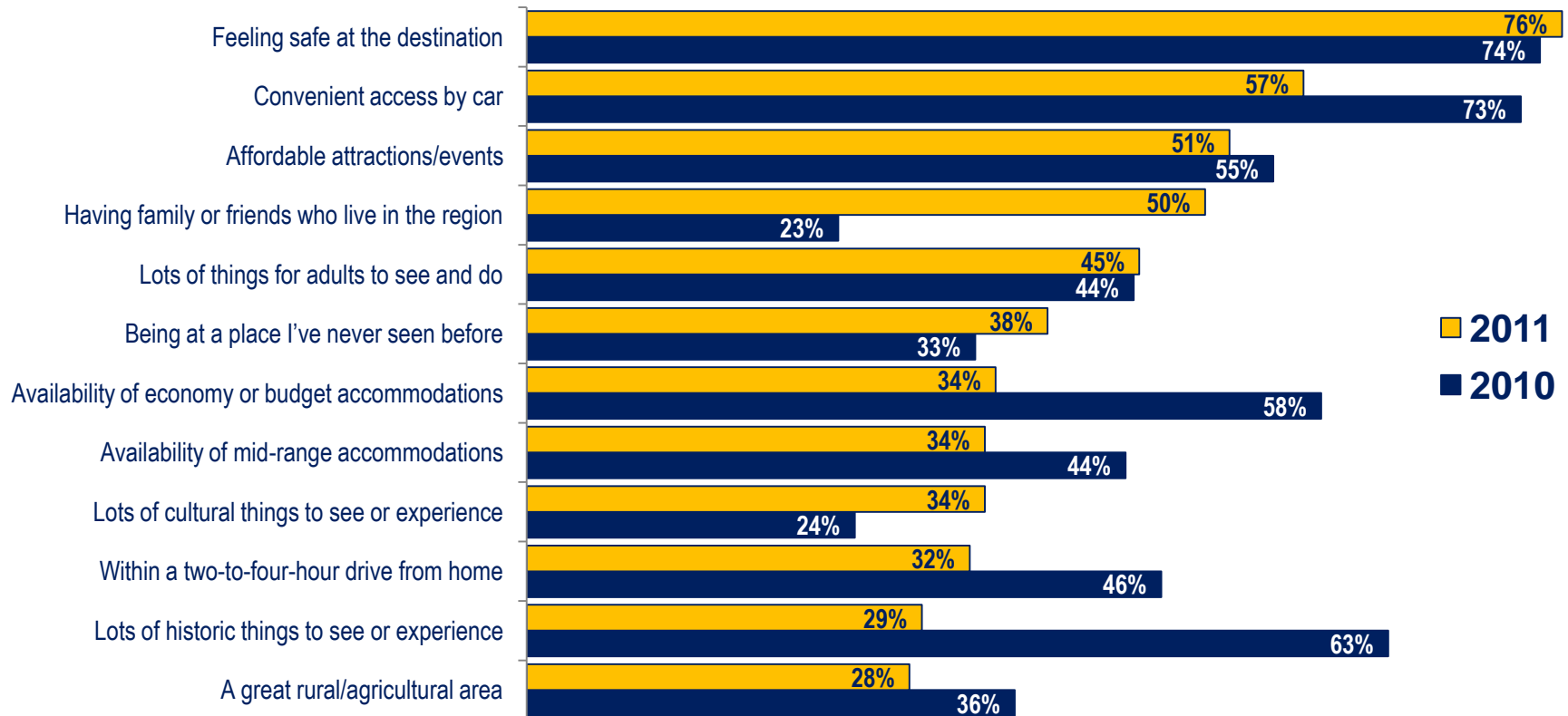
Importance of Factors In Choosing to Visit the Region

Importance of Factors In Choosing to Visit Upstate PA Region



Base: Overnight Trips

% Rating Factor as Very Important*

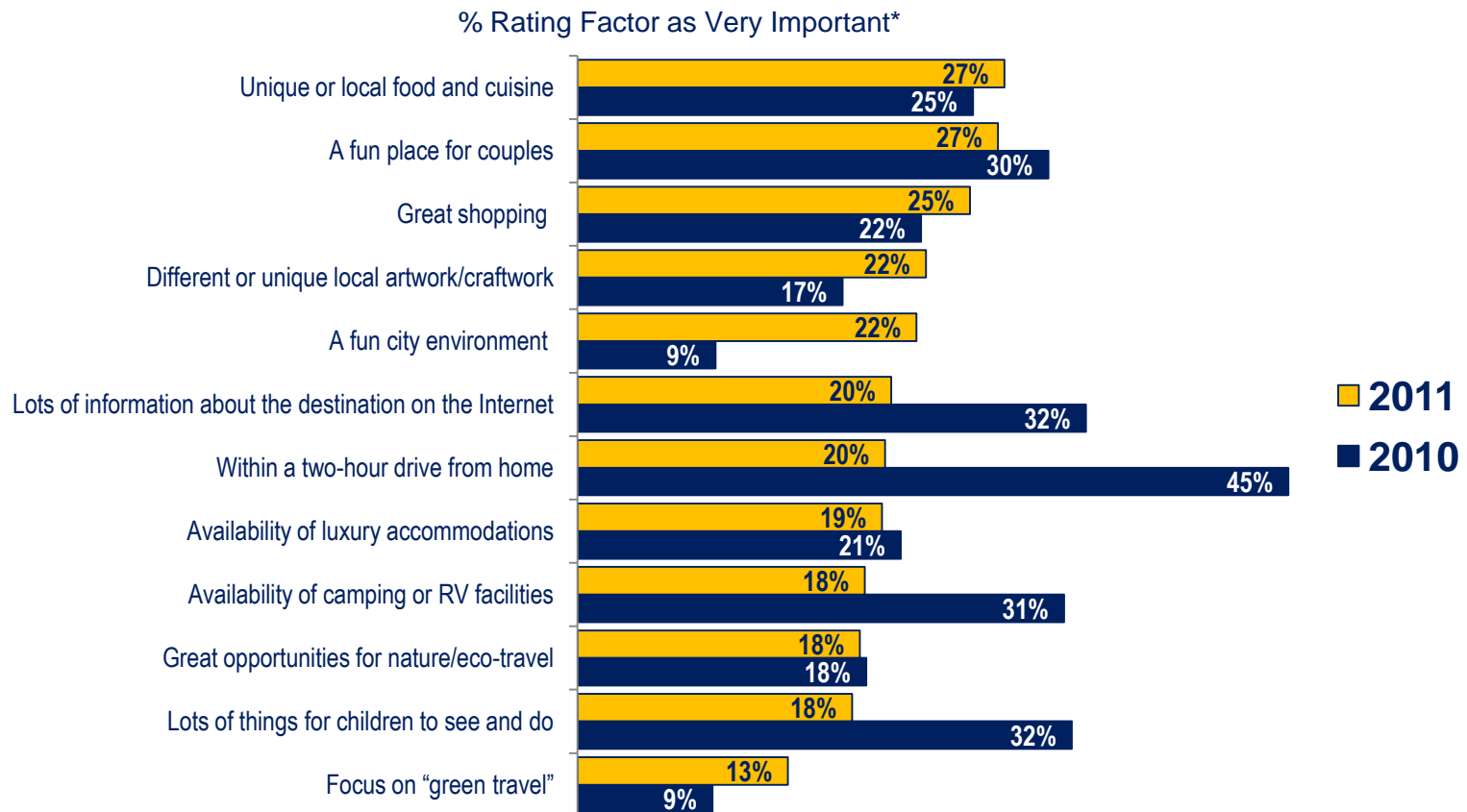


* Rated 8, 9 or 10 on 10-pt. Importance scale

Importance of Factors In Choosing to Visit Upstate PA Region (cont'd)



Base: Overnight Trips



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