

Lackawanna Valley National Heritage Area Visitor Survey and Economic Impact Analysis



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LACKAWANNA VALLEY NATIONAL HERITAGE AREA

Lackawanna Valley National Heritage Area (LVNHA), established in 2000, conserves the industrial and anthracite heritages along the Lackawanna River in northeast Pennsylvania (Figure 1). This region has a rich culture and history of anthracite mining, which was once the world’s largest anthracite field. LVNHA, administrated by the Lackawanna Heritage Valley Authority (LHVA), offers combination of trails, museums, and other visitor attractions in Scarnton / Lackawanna County area. LVNHA officially managed 64 National Register Properties, 2 National Historic Landmarks, and 3 National Nature Landmarks (National Park Service, 2002).

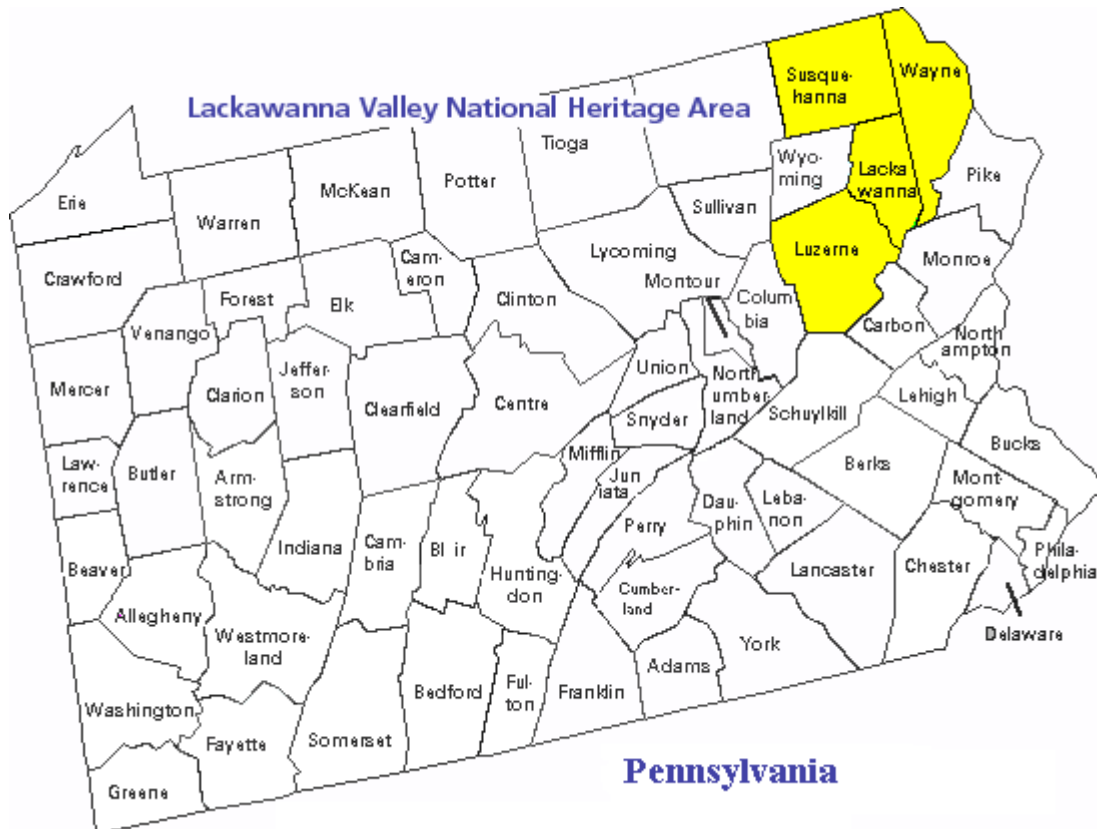


Figure 1. Lackawanna Valley NHA, PA

LACKAWANNA VALLEY NATIONAL HERITAGE AREA VISITOR SURVEY

The Lackawanna Valley NHA visitor survey was conducted from July 21 to August 13, 2003. The survey was designed to gather information on awareness of the heritage area, visitation patterns to the communities, trip characteristics, spending, and demographics. The survey was administrated by the LVNHA staff who identify sampling locations and carried out data collection procedures. Technical assistances with the survey design and data analysis were provided by Michigan State University. General survey procedures are outlined in a guidebook being followed at several heritage areas (Stynes and Sun, 2003).

The visitor survey used a two-stage approach, contacting visitors at heritage sites where a short initial survey was conducted. One adult member of each party was interviewed. Subjects were then asked if they are willing to complete a more extensive mailback survey at the end of their trip. The mailback survey measured spending patterns, activities, evaluations of visitor experiences and more detailed trip information. Mailback surveys were sent to participants after they arrived back home.

The Lackawanna Valley NHA Visitor Survey collected 271 samples during the onsite interviews, and 121 of them (55%) agreed to participate in the post-trip mailback surveys. Forty-nine mailback surveys were returned for an 18% response rate based on all on-site contacts or 39% for those who agreed to participate.

The report first summarizes the visitor characteristics and trip patterns based on visitor surveys. The spending profiles and the economic impact analysis followed.

VISITOR AND TRIP CHARACTERISTICS

User Demographics

Forty-three percent of the sampled population have graduate degree and 44% have income around \$50,000-\$74,999 (Table 1). Sixty percent of visitors are from the state of Pennsylvania, fifty-nine percent aged above 59, and the majority is White/Caucasian.

Table 1. User Demographics

Attributes	Percent	Attributes	Percent
Racial/ ethnicity status		Places of Origins	
White/Caucasian	92%	United States - Pennsylvania	62%
Hispanic or Latino	4%	United States - Other states	37%
Asian	2%	<u>Canada & Holland</u>	<u>1%</u>
<u>Other</u>	<u>2%</u>	Total	100%
Total	100%		
Gender		Age	
Male	39%	<25	2%
<u>Female</u>	<u>61%</u>	36-45	18%
Total	100%	46-55	20%
		56-65	41
		>65	<u>18%</u>
		Total	100%
Education		Composition of household members	
Less than high school	14%	Adults only (18+)	74%
High school graduate	16%	<u>Adults and children</u>	<u>26%</u>
Some college or 2-year degree	20%	Total	100%
4-year undergraduate degree	6%		
<u>Graduate degree</u>	<u>43%</u>	Adults in the household^a	
Total	100%	18-25	6%
		26-59	71%
		60 or older	59%
		Children in the household^a	
		<5	25%
		6-12	83%
		13-17	33%

a. Percentages do not sum to 100 because visitors could select more than one category.

Note. All demographic Information was obtained from the post-trip mailback survey (N=49).

Trip Characteristics

Around three fourth of sampled population had visited the Scranton/ Lackawanna County before, and the average visits in the previously 12 months was 7.2 times (Table 2). One third of visitors stayed overnight in the region, and the most cited lodging category was Hotel or Bed and Breakfast (B&B) (50%), followed by staying with friends and relatives (31%). The average length of stay was 4 hours for day trips, and 4.3 nights for overnight trips. Around half of the visitors have children on the trip. Average party size was 2.3 for adults and 2.0 for children.

Table 2. Trip Characteristics

First trip to the Scranton/ Lackawanna County area				Lodging type for overnight visitors					
		Frequency	Percent			Frequency	Percent		
No		195	72	Hotel or B&B		45	50		
Yes		76	28	Campground		7	8		
Total		271	100	Staying with friends		28	31		
				<u>Staying overnight outside of the area</u>					
						10	11		
				Total		90	100		
Day trip vs. overnight trip				Composition of travel party					
		Frequency	Percent			Frequency	Percent		
Day trip		172	66	Adults only		159	59		
Overnight trip		90	34	With children		112	41		
Total		262	100	Total		271	100		
Length of stay in the region				Distribution of adults and children in the travel party					
Hours	Percent	Nights	Percent	Adults	Percent	Children	Percent		
1	7	1	21	1	20	1	37		
2	19	2	26	2	53	2	40		
3	20	3	14	3	15	3	15		
4	18	4	8	4	8	4	4		
5	12	5	11	5	1	5	3		
6	10	6	2	6	0	6	1		
7	2	7	10	7	0	Total	100		
8	10	10	2	8+	1	N	112		
9+	2	11+	5	Total	100				
Total	100	Total	100	N	271				
N	153	N	90						
Average		4.08	Average	4.32	Average		2.3	Average	2.0

Note. The average nights stayed in the local area is 3.1 if cases with length of stay longer than 8 are excluded.

Visit Patterns and Source of Information

The most visited site on the trip was Lackawanna County Stadium (38%), followed by Coal Mine Tour (36%); attractions that were most aware of were Steamtown and Coal Mine Tour (66%). Visitors, in average, visited 2.3 attractions on the trip. Two thirds of visitors indicated the listed attractions were their primary reason for visiting. Fifteen percent of visitors attended a special event in the region. The most cited sources of information from which visitors first learned about the Lackawanna Valley NHA and Scranton were newspaper/magazines and word of month, respectively.

Table 3. Visit Patterns and Source of Information

Attractions that were aware of and visit on this trip			Did you visit the Lackawanna Heritage Valley to attend a special event?		
Attractions	Aware of	Visit on this trip			
			Frequency	Percent	
1. Steamtown	66%	35%	No	41	85
2. Coal Mine Tour	65%	36%	Yes	7	15
3. Anthracite Heritage Museum	57%	25%	Total	48	100
4. Lackawanna County Stadium	57%	38%	Note. Information was obtained from the post-trip survey. Events included Ballgame (n=2), entertain company (n=1), Pocono Blues Festival (n=1), and Trolley/Mine (n=1).		
5. Visitors Center	49%	20%	Source of Information from which visitors first learned about the Lackawanna Heritage Valley Area (LVHA) and Scranton		
6. Trolley Station and Museum	48%	30%	Sources	LHVA	Scranton
7. Everhart Museum	44%	8%	Newspaper or magazine	28%	17%
8. Cultural Center	42%	7%	Friends or word of mouth	26%	30%
9. Iron Furnaces	42%	21%	Other	25%	32%
Was one or more of these attractions the primary reason for your trip to this area?			Internet	17%	11%
			Brochure or newsletter	17%	15%
			State/Regional tourism information	13%	17%
			Billboard or road sign	11%	13%
			Radio or TV	6%	9%
Frequency			Note. Information was obtained from the post-trip survey. Percentages do not equal 100 because visitors could report multiple categories.		
Percent					
No	98	37			
Yes	168	63			
Total	266	100			
Information was obtained from the post-trip survey.					
Total attractions visited on the trip					
			Onsite Survey	Mailback survey	
Attractions visited on the trip	2.3	2.9			
N	269	45			

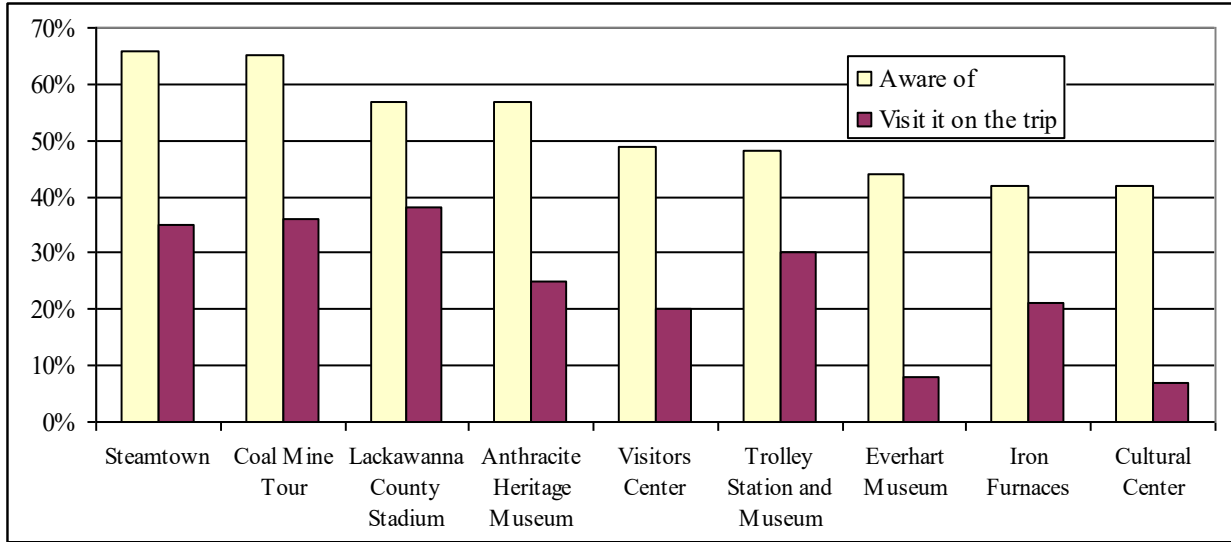


Figure 2. Comparison of Attractions that were aware of and visit on this trip

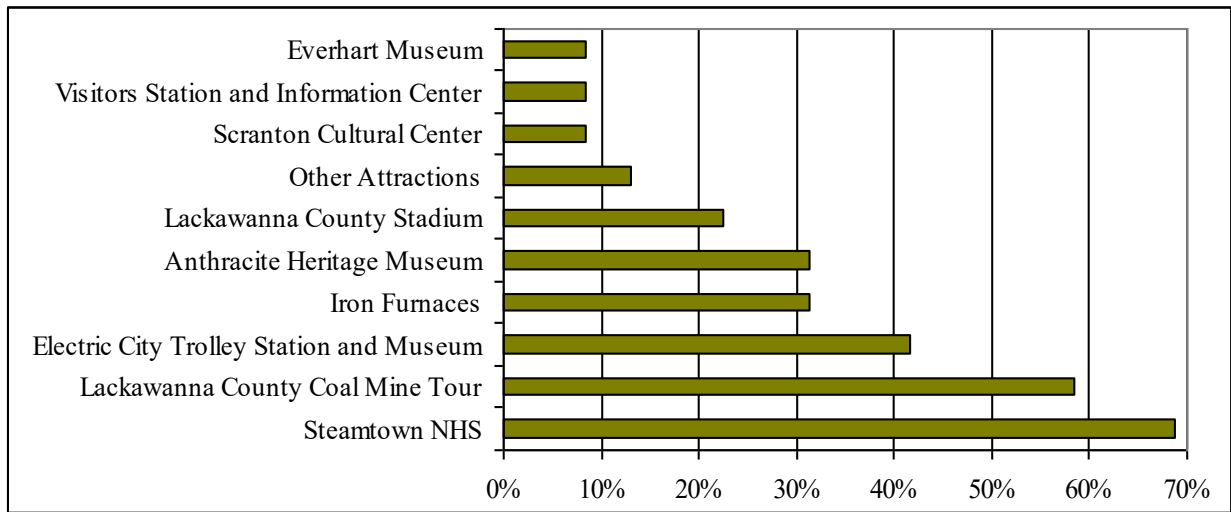


Figure 3. Attractions Visited on This Trip

Information was obtained from the post-trip survey. Other attractions that respondents have visited are: Archbald Pothole, Barons baseball, Camel Beach, Honesdale Train Museum, Lahey Family fun Park, Nay Aug Park, Lackawanna State Park, Radisson, Mcdade park, Rickett's Glen, Hickory run and Blues Festival Train ride.

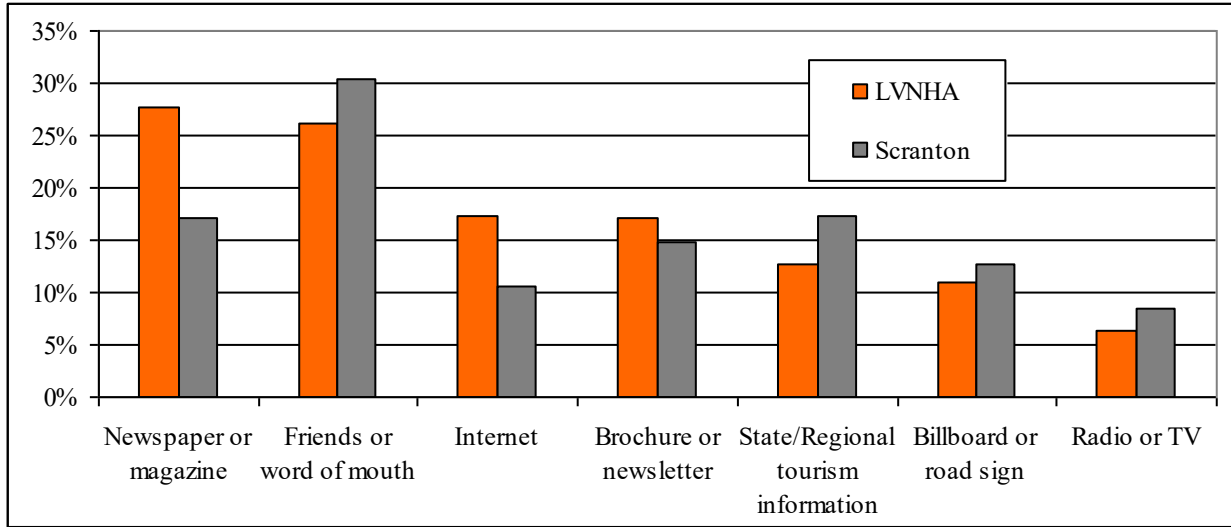


Figure 4. Sources of Information from Which Visitors First Learned About the LVNHA and Scranton
Information was obtained from the post-trip survey.

Awareness and Program Evaluation

Thirty-seven percent of visitors were very familiar with LVNHA and 31 percent were somewhat familiar (Table 4). Fifty-seven percent of visitors indicated LVNHA was their primary purpose of the trip and 24% reported LVNHA was a side trip or stop. “Tours” and “Parking” were the two most satisfied program/service in LVNHA; around 90% of visitor rated those as “Excellent” or “Good”. Shopping opportunities and restaurant/foods are the two least satisfied services.

Table 4. Awareness and Trip Purposes

Familiarity with the Lackawanna Valley NHA			Primary purpose of this trip		
	N	Pct		N	Pct
Very familiar	100	37	Specifically to visit LVNHA	26	57
Somewhat familiar	85	31	LVNHA was a side trip or stop	11	24
Unfamiliar	71	26	Visiting friends or relatives	7	15
<u>Not sure</u>	<u>14</u>	<u>5</u>	<u>Business or combined</u>		
Total	270	100	<u>business/pleasure trip</u>	<u>2</u>	<u>4</u>
			Total	46	100

Information was obtained from the post-trip survey.

Table 5. Ratings of Visitor Experiences at the Lackawanna Valley NHA

Attributes	Excellent	Good	Average	Poor	Very poor	Don't know	Average
Tours	43%	39%	4%	0%	0%	13%	1.55
Parking	46%	50%	4%	0%	0%	0%	1.58
Exhibits	43%	43%	7%	0%	0%	7%	1.61
Hospitality	43%	37%	15%	0%	0%	4%	1.70
Accessibility of facility	18%	29%	4%	0%	0%	49%	1.74
Restrooms	30%	55%	13%	0%	0%	2%	1.83
Maps	33%	35%	15%	2%	0%	15%	1.85
Signage	33%	42%	15%	2%	2%	6%	1.91
Shopping opportunities	14%	47%	16%	0%	0%	23%	2.03
Restaurants/Food	16%	40%	24%	2%	0%	18%	2.16

Note. 1 equals “excellent”; 5 equals “very poor”. Mean value close to 1 implies a very good quality.

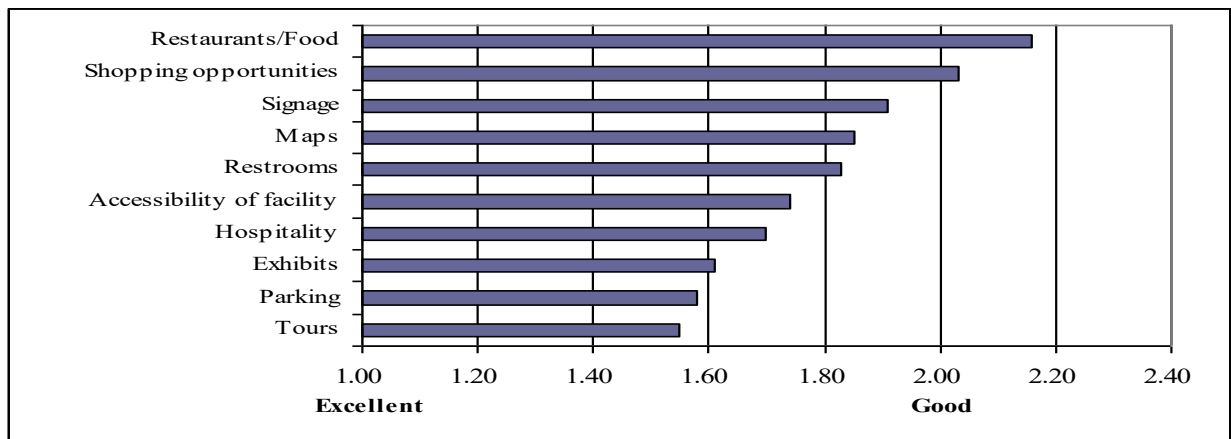


Figure 5. Evaluation Scores for Service/Program in the Lackawanna Valley NHA

Information was obtained from the post-trip survey.

ECONOMIC IMPACT ANALYSIS

The economic impacts of heritage visitors are estimated as:

$$\text{Economic Impacts} = \text{Number of Visits} * \text{Spending per Visit} * \text{Multipliers}$$

These parameters were provided from different sources.

Visitation: (use 1000 party trips?). Steamtown NHA reported 114,855 recreation visits in 2003.

Spending per visit: The spending profile was estimated from the LVNHA visitor survey, which itemize the trip expenses into eight individual categories.

Multipliers: Multipliers were provided from the Money Generation Model 2 (MGM2) small metro default multipliers. A whole set of multipliers are listed on the appendix.

Visitor Segments

In order to reliably estimate spending and economic impacts, visitors must be segmented into trip types that help explain spending patterns. Four segments were formed from data gathered in the onsite survey:

Local-day trip: Day visitors who reside in the region. Day visitors with three digit ZIP-code of 127 and 183~188 are included in this category.

Non-local day trips: Day visitors from outside the region and not staying overnight in the area. This includes visitors on extended trips who spend part of a day visiting the area.

Hotel: Overnight visitors staying in hotels, motels, or bed and breakfast establishments in the region.

Other OVN: Other overnight visitors including campers and visitors staying with friends or relatives in the region.

Segment shares estimated from the on-site survey are: 42% local visitors, 28% day trips from outside the region, 18% hotel and 12% other overnight trips (Table 6). The average length of stay was 2.3 nights for hotel visitors and 4.0 nights for other overnight visitors. The average party size is around 2.9 persons.

Table 6. Trip Characteristics by Lodging Segments

Lodging segment	Local-day visitor	Non-local day visitor	Hotel	Other OVN
Party size	2.93	3.06	2.83	2.68
Length of stay	1.00	1.00	2.27	3.96
Total visited attractions	2.1	2.1	2.7	2.7
N	107	73	45	32
Pct	42%	28%	18%	12%

Note. Cases with party sizes larger than 8 (N=6) or lengths of stay longer than a week (N=6) are excluded in the computation.

Visitor Spending

The LVNHA survey measured spending by visitors within the Scranton/Lackawanna County area on their trip. Spending was measured for the entire travel party and then converted from per party trip spending to per party day/night spending using visitors' lengths of stay. Distinct spending profiles are estimated for each of the three visitor trip segments.

Visitors on day trips spent about \$50 on their trip while overnight visitors staying in hotels, motels or B&B's spent \$446 for a two night stay, or about \$223 per night with a nightly room rate of \$96. Other overnight visitors spend around \$56 per day, in which are mainly the visitors staying with friends and relatives (Table 7).

Table 7. Spending Profiles of Visitor Spending to LVNHA, 2003 (Spending per party per day)

Category	Day visitor	Hotel	Other OVN
Party trip spending (\$)			
Motel, hotel cabin or B&B	0.00	191.20	0.00
Camping fees	0.00	0.00	10.71
Restaurants & bars	8.04	119.00	56.81
Groceries, take-out food/drinks	1.25	0.00	23.33
Gas & oil	8.50	25.50	15.24
Local transportation	0.17	5.90	1.76
Admissions & fees	18.08	55.40	37.45
<u>Souvenirs and other expenses</u>	<u>14.08</u>	<u>48.50</u>	<u>36.90</u>
Total	50.13	445.50	182.21
Party day spending (\$)			
Motel, hotel cabin or B&B	0.00	95.60	0.00
Camping fees	0.00	0.00	3.31
Restaurants & bars	8.04	59.50	17.54
Groceries, take-out food/drinks	1.25	0.00	7.21
Gas & oil	8.50	12.75	4.71
Local transportation	0.17	2.95	0.54
Admissions & fees	18.08	27.70	11.57
<u>Souvenirs and other expenses</u>	<u>14.08</u>	<u>24.25</u>	<u>11.40</u>
Total	50.13	222.75	56.27
Number of cases	12	10	21
Standard error of mean (party day spending)	13.61	33.53	16.34
Percent error	27%	15%	29%

Information was obtained from the post-trip survey.

Spending averages estimated in LVNHA survey are subject to sampling errors of 15-30%. Due to small samples within each visitor segment, the LVNHA spending profiles for specific trip type segments are modified based on the profiles from the Michigan Museum visitor survey, which included similar types of sites and destination areas, and are based on a substantial large sample size¹. Day trip spending for LVNHA was differentiated based on local and non-

¹ The spending profile of Michigan Museum Study was based on 1,280 cases.

local visitors where non-local day visitors were assumed to spend around 30% more than local day visitors. The weighted spending average of day visitors, after taking account of segment shares (day visitors 42%; non-local day visitors 28%), was around \$50 per party per day. The spending profiles of hotel and other OVN visitors were directly computed from the LVNHA visitor survey without adjustment.

Table 8. Suggested Spending Profiles of Visitor Spending to LVNHA, 2003 (Spending per party per day)

Category	Local-day visitor	Non-local day visitor	Hotel	Other OVN
Motel, hotel cabin or B&B	0.00	0.00	95.60	0.00
Camping fees	0.00	0.00	0.00	3.31
Restaurants & bars	10.01	12.25	59.50	17.54
Groceries, take-out food/drinks	1.38	2.51	0.00	7.21
Gas & oil	3.74	7.61	12.75	4.71
Local transportation	0.56	1.22	2.95	0.54
Admissions & fees	12.30	13.46	27.70	11.57
<u>Souvenirs and other expenses</u>	<u>17.24</u>	<u>27.10</u>	<u>24.25</u>	<u>11.40</u>
Total	45.22	64.15	222.75	56.27