2011 ANNUAL TRAVEL PROFILE

Lehigh Valley Region
Lehigh Valley 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.
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.
Lehigh Valley 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.
Lehigh Valley Region
Main Reason for Trip
The Lehigh Valley region had the highest proportion of overnight travelers visiting a region for VFR (Visiting Friends/Relatives) purposes in 2011.
The Lehigh Valley region had the highest proportion of day-trip travelers visiting a region for business and/or business-leisure purposes in 2011.
Lehigh Valley Region
Origin Markets – Overnight Leisure
Main Urban Markets for Overnight Leisure Trips

Base: Total Overnight Leisure Trips

In-State DMA's

Philadelphia: 18% (2011), 18% (2010)
Pittsburgh: 3% (2011), 3% (2010)

Out-of-State DMA's

Washington, DC: 5% (2011), 5% (2010)
Baltimore, MD: 4% (2011), 2% (2010)
Lehigh Valley Region
Origin Markets – Leisure Day-Trips
Main Origin States for Leisure Day-Trips

Base: Total Leisure Day-Trips

- **Pennsylvania**
  - 2011: 47%
  - 2010: 61%

- **New Jersey**
  - 2011: 34%
  - 2010: 29%

- **New York**
  - 2011: 9%
  - 2010: 6%

- **Maryland**
  - 2011: 7%
  - 2010: 1%
Main Urban Markets for Leisure Day-Trips

Base: Total Leisure Day-Trips

In-State DMA's
- Philadelphia (2011: 35%, 2010: 28%)
- Wilkes Barre-Scranton (2011: 16%, 2010: 14%)
- Pittsburgh (2011: 2%, 2010: 1%)

Out-of-State DMA's
- New York, NY/NJ/PA/CT (2011: 37%, 2010: 30%)
- Baltimore, MD (2011: 5%, 2010: 1%)
- Washington, DC (2011: 2%, 2010: 0%)
Lehigh Valley Region
Traveler Profile
### Gender

#### OVERNIGHT

**Base: Total Overnight Leisure Trips**

<table>
<thead>
<tr>
<th></th>
<th>Lehigh Valley</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>42%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Female</td>
<td>58%</td>
<td>55%</td>
<td>55%</td>
</tr>
</tbody>
</table>

#### DAY-TRIPS

**Base: Total Leisure Day-Trips**

<table>
<thead>
<tr>
<th></th>
<th>Lehigh Valley</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>42%</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Female</td>
<td>58%</td>
<td>57%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Age

### OVERNIGHT

<table>
<thead>
<tr>
<th>Base: Total Overnight Leisure Trips</th>
<th>Median Age:</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>18-24</td>
<td>13%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>25-34 years</td>
<td>25-34</td>
<td>19%</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>35-44 years</td>
<td>35-44</td>
<td>17%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>45-54</td>
<td>16%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>55-64</td>
<td>11%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>65+</td>
<td>65+</td>
<td>13%</td>
<td>15%</td>
<td>16%</td>
</tr>
</tbody>
</table>

### DAY-TRIPS

<table>
<thead>
<tr>
<th>Base: Total Leisure Day-Trips</th>
<th>Median Age:</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24 years</td>
<td>18-24</td>
<td>6%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>25-34 years</td>
<td>25-34</td>
<td>16%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>35-44 years</td>
<td>35-44</td>
<td>18%</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>45-54 years</td>
<td>45-54</td>
<td>21%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>55-64 years</td>
<td>55-64</td>
<td>17%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>65+</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Median Age: 39.5, 44.4, 44.5

Median Age: 47.3, 47.2, 45.5
Race

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Race</th>
<th>Lehigh Valley</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>85%</td>
<td>88%</td>
<td>83%</td>
</tr>
<tr>
<td>African-American</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
<thead>
<tr>
<th>Race</th>
<th>Lehigh Valley</th>
<th>Pennsylvania</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>92%</td>
<td>89%</td>
<td>83%</td>
</tr>
<tr>
<td>African-American</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Marital Status

**OVERNIGHT**
Base: Total Overnight Leisure Trips

- Married/With partner: 57%
- Never married: 35%
- Divorced/Widowed/Separated: 8%

**DAY-TRIPS**
Base: Total Leisure Day-Trips

- Married/With partner: 77%
- Never married: 14%
- Divorced/Widowed/Separated: 9%
Household Size

**OVERNIGHT**

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
<th>Base: Total Overnight Leisure Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>9%</td>
<td>12%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>2 members</td>
<td>34%</td>
<td>38%</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>3 members</td>
<td>23%</td>
<td>17%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>4 members</td>
<td>22%</td>
<td>20%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>5+ members</td>
<td>12%</td>
<td>13%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

**DAY-TRIPS**

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
<th>Base: Total Leisure Day-Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>2 members</td>
<td>45%</td>
<td>38%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>3 members</td>
<td>16%</td>
<td>20%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>4 members</td>
<td>18%</td>
<td>20%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>5+ members</td>
<td>8%</td>
<td>12%</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>
Children in Household

**OVERNIGHT**

- **Base: Total Overnight Leisure Trips**
  - **No children under 18**
    - Lehigh Valley: 67%
    - Pennsylvania: 62%
    - US Average: 61%
  - **Any child between 13-17**
    - Lehigh Valley: 13%
    - Pennsylvania: 14%
    - US Average: 14%
  - **Any child between 6-12**
    - Lehigh Valley: 15%
    - Pennsylvania: 16%
    - US Average: 17%
  - **Any child under 6**
    - Lehigh Valley: 18%
    - Pennsylvania: 20%
    - US Average: 21%

**DAY-TRIPS**

- **Base: Total Leisure Day-Trips**
  - **No children under 18**
    - Lehigh Valley: 63%
    - Pennsylvania: 63%
    - US Average: 60%
  - **Any child between 13-17**
    - Lehigh Valley: 15%
    - Pennsylvania: 14%
    - US Average: 15%
  - **Any child between 6-12**
    - Lehigh Valley: 19%
    - Pennsylvania: 15%
    - US Average: 18%
  - **Any child under 6**
    - Lehigh Valley: 22%
    - Pennsylvania: 19%
    - US Average: 20%
Education

**OVERNIGHT**

Base: Total Overnight Leisure Trips

- **Post-graduate**
  - Lehigh Valley: 20%
  - Pennsylvania: 20%
  - US Average: 17%

- **College graduate**
  - Lehigh Valley: 45%
  - Pennsylvania: 38%
  - US Average: 39%

- **Some college**
  - Lehigh Valley: 22%
  - Pennsylvania: 24%
  - US Average: 28%

- **High school or less**
  - Lehigh Valley: 14%
  - Pennsylvania: 18%
  - US Average: 15%

- **Other**
  - Lehigh Valley: 0%
  - Pennsylvania: 1%
  - US Average: 1%

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

**DAY-TRIPS**

Base: Total Leisure Day-Trips

- **Post-graduate**
  - Lehigh Valley: 25%
  - Pennsylvania: 17%
  - US Average: 15%

- **College graduate**
  - Lehigh Valley: 42%
  - Pennsylvania: 38%
  - US Average: 37%

- **Some college**
  - Lehigh Valley: 17%
  - Pennsylvania: 23%
  - US Average: 29%

- **High school or less**
  - Lehigh Valley: 15%
  - Pennsylvania: 20%
  - US Average: 18%

- **Other**
  - Lehigh Valley: 1%
  - Pennsylvania: 1%
  - US Average: 1%

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

OVERNIGHT

Base: Total Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
<td>25%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>18%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>21%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Under $25K</td>
<td>15%</td>
<td>13%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Median: $66,950 for Lehigh Valley, $69,250 for PA, $65,780 for US

DAY-TRIPS

Base: Total Leisure Day-Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Lehigh Valley</th>
<th>PA</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
<td>24%</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>$75K-$99.9K</td>
<td>17%</td>
<td>16%</td>
<td>14%</td>
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<tr>
<td>$50K-$74.9K</td>
<td>20%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>$25K-$49.9K</td>
<td>20%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Under $25K</td>
<td>12%</td>
<td>12%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Median: $73,550 for Lehigh Valley, $64,590 for PA, $59,420 for US
Lehigh Valley Region

Attractions Visited — Overnight Trips
Attractions/Events Visited
Lehigh Valley Region

Base: Overnight Trips

- Bethlehem Sands Casino Resort: 16%
- Winery/Vineyard: 12%
- Historic Home/Museum: 12%
- The Downs at Lehigh Valley: 9%
- Covered Bridges: 9%
- Dorney Park & Wildwater Kingdom: 8%
- National Canal Museum: 6%
- Mack Trucks: 4%
- Crayola Factory: 4%
- Martin Guitars: 4%
- Museum of Indian Culture: 3%
- Underground Railroad: 1%
- Golf course: 1%
Lehigh Valley Region

Importance of Factors In Choosing to Visit Region
Importance of Factors In Choosing to Visit Lehigh Valley Region

Base: Total Overnight Trips

- Feeling safe at the destination: 55% (2011) vs 61% (2010)
- Having family or friends who live in the region: 46% (2011) vs 49% (2010)
- Affordable attractions/events: 37% (2011) vs 48% (2010)
- Convenient access by car: 43% (2011) vs 45% (2010)
- Lots of things for adults to see and do: 30% (2011) vs 34% (2010)
- Unique or local food and cuisine: 28% (2011) vs 28% (2010)
- Being at a place I’ve never seen before: 27% (2011) vs 33% (2010)
- Availability of economy or budget accommodations: 27% (2011) vs 33% (2010)
- A great rural/agricultural area: 19% (2011) vs 26% (2010)
- Lots of historic things to see or experience: 18% (2011) vs 25% (2010)
- Lots of things for children to see and do: 19% (2011) vs 24% (2010)
- Within a two-to-four-hour drive from home: 19% (2011) vs 23% (2010)
## Importance of Factors In Choosing to Visit Lehigh Valley Region

<table>
<thead>
<tr>
<th>Factor</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for couples</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>Availability of mid-range accommodations</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Lots of information about the destination on the Internet</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Great shopping</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Within a two-hour drive from home</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>A fun city environment</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Lots of cultural things to see or experience</td>
<td>18%</td>
<td>32%</td>
</tr>
<tr>
<td>Great opportunities for nature/eco-travel</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Different or unique local artwork/craftwork</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Availability of luxury accommodations</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Focus on &quot;green travel&quot;</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Availability of camping or RV facilities</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>