

LEISURE TRAVEL STUDY

**2010 VISITOR PROFILE- RETURN ON INVESTMENT -
CONVERSION RATE AND ECONOMIC IMPACT ANALYSIS -**

REGIONAL OFFICE OF SUSTAINABLE TOURISM (ROOST)

ESSEX COUNTY, NEW YORK



TECHNICAL ASSISTANCE
CENTER (TAC) AT

SUNY PLATTSBURGH

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EXECUTIVE SUMMARY

This study by the Technical Assistance Center (TAC) at State University of New York at Plattsburgh was commissioned to ascertain key marketing program statistics and visitor information for the Regional Office of Sustainable Tourism (ROOST) in Essex County, New York. The research was targeted exclusively toward the leisure travel market and does not reflect impacts produced by the meeting/convention market segments.

This is the seventh consecutive year that this research has been conducted for Essex County tourism by TAC. ROOST is responsible for marketing Essex County's tourism assets. The primary focus of the research is to determine the return on investment ratio for Essex County public marketing dollars expended during 2010 and the conversion factor that estimates the number of visitors to the region, as a result of the marketing dollars spent. A presentation of trends for the past five years is also included within this research where possible as well as estimated economic impacts of visitor spending.

The number of potential visitors (traceable leads) inquiring about travel to Essex County in 2010 and providing contact information was 60,684. A sample of more than half (more than 32,000) of these potential visitors were provided with a request to complete an online survey. The survey response was substantially lower this year, at 4.5%, than experienced in recent years. As a result, readers are cautioned particularly about making direct comparisons from across other years when the response rate was higher. This rate has ranged from 6% to 10% in other years.

Highlights from the report include:

- Visitor household income is \$80,000 and the average age is 52 years old.
- A large number of visitors from within New York State and fewer Canadian visitors came to Essex County in 2010.
- Outdoor activities are the strongest reported attraction to the area, followed by relaxing, dining and shopping. Sightseeing and visiting Olympic sites are also very strong draws.
- Hiking is the strongest outdoor activity attraction, followed by canoeing/kayaking, fishing, skiing/boarding and boating.
- The High Peaks (Lake Placid, Keene, Keene Valley area) region was the most popular sub-region of the county for visits or planned visits. This was followed closely by the Whiteface (Whiteface Mountain, Wilmington, Jay area) and Saranac Lake (Saranac Lake/Tupper Lake area) regions.
- Eighty percent (80%) of respondents reported that ecological or environmental sensitivity of their travel destination is either "important" or "extremely important".

- The average reported stay in 2010 is 4.1 nights (5.1 days), which is slightly higher than in 2009. The average reported total visitor party size is 3.9 persons, which comprises a slightly larger adult party group size than in 2009.
- Peak summer (July to August) shows the largest proportion of visitation, followed by fall foliage season (September to October).
- Hotels and motels remain the most common lodging choice of respondents and both rose in popularity in 2010.
- Reported expenditures by visitors to Essex County in 2010 fell from the previous year, to \$431 per visitor party per day. Decreases in all categories of spending, except transportation, were noted.
- Conversion measurement or the percent of visitors who stated that the information or advertisements viewed either reinforced plans or helped them decide to take an unplanned trip, was 83%. This is very near the 82% average of the past five years.
- The estimated number of leisure visitors to the region in 2010 based on contacts through ROOST is 196,434. This is an approximate 20% decrease from 2009.
- The estimated number of visitor nights for those likely influenced by ROOST marketing is 805,379, substantially lower than the more than 950,000 in the prior year.
- For each occupancy tax dollar Essex County spent on marketing, visitors to the County spent an estimated \$65.
- A major reduction in marketing expenditures in the county has occurred over the last two years with the elimination of regional cooperative spending in 2009 and with zero matching funds from the state in 2010. These reductions have clearly impacted the ability of tourism professionals in Essex County to target a broad reach of potential travelers.

IMPLAN economic modeling software was employed to estimate complete visitor spending impacts to Essex County in 2010. The following results are found through this analysis:

- The food services and drinking places sector is estimated to provide 1,116 jobs in Essex County in 2010 and \$26 million in labor income (household spending) expenditures. This is the second largest employment sector in the county (after government).

- Hotels and motels are estimated to provide 659 current jobs in Essex County in 2010 and \$25 million in labor income (household spending) dollars. This is the fifth largest employment sector in the county.
- Almost one thousand more jobs were supported within the county, across all industries, by visitor spending in Essex County in 2010. This is in addition to the already existing tourism-industry jobs.
- An estimate of nearly \$31 million additional household spending (labor income) in the county was generated by visitor spending in Essex County in 2010. An estimate of nearly \$53 million additional total spending in the county (value added or gross regional product) was provided by visitor spending within the county, based on the 2010 visitor model.

Survey responses by those who participate through ROOST social media outlets (Facebook and Twitter) were separated for individual consideration, versus the remainder of the group. The following notable differences were observed within this sub-group:

- Social media respondents represented a slightly lower age demographic, at 49 years old (compared to 52 of the non-social media respondents).
- Social media respondents reported even higher levels of attraction to the three overall popular activities (outdoor activities, shopping/relaxing/dining and visiting Olympic sites) than non-social media respondents. These respondents also reported higher levels of attraction to hiking and canoeing/kayaking outdoor activities.
- Social media respondents reported higher levels of interest in most sub-regions of Essex County. The Schroon Lake sub-region is the exception to this. Interest in the Lake Champlain region was also substantially higher among this group.
- Duration of stay is reported as slightly longer (by approximately 0.5 night) among social media respondents than by non social media respondents. Overall party size is also slightly larger for this group (by less than 0.2 person).
- Social media respondents report visitation to Essex County *more frequently* during the winter (November to February) and *less frequently* in the spring (March to June) than non-social media respondents.
- Stays with families and friends and camping in an RV or tent were two to three times more likely among this group.

- Social media respondents reported lower daily visitor spending in every category than non-social media respondents. The estimated daily expenditure by visitor party per day is \$379. Adjusting this for the 0.5 night longer duration of stay reported in the survey by this group results in an estimated five percent lower total expenditures.

This research again showed the positive results of Essex County's marketing campaign, as well as the economic benefits to Essex County for the tourism marketing dollars expended. The significant challenges posed by the economy in the last two years have affected tourism measures industry-wide and regionally in areas. Severe reductions in marketing dollars are showing impacts to county visitation according to the data generated by this research. The strength of economic impacts of visitor spending provide further information about the value of tourism in the region, even in a year that saw reduced spending and visitation.

The research can be used to enhance and evaluate future marketing efforts, techniques, and marketing channels. The data generated by this study remains consistent over the past five years in most areas, strengthening the credibility of findings and highlighting areas where emerging trends (such as social media as a manner by which to reach potential visitors) are apparent. Future research should address the response rate concern from this year's survey.

METHODOLOGY

Background

The Regional Office of Sustainable Tourism (ROOST) engaged the Technical Assistance Center (TAC) at SUNY Plattsburgh to conduct research through a leisure visitor survey for the seventh consecutive year. The survey instrument was designed collaboratively by TAC and ROOST to gather information on its leisure visitors and to measure the return on investment and conversion rate of 2010 Essex County marketing expenditures. The survey is attached as Appendix E.

The survey was distributed electronically by ROOST to their electronic database of visitors or parties inquiring about visitation to Essex County in 2010. These names are traceable direct inquiries generated by the office's marketing efforts, which resulted in individuals providing their contact information. The inquiry categories included respondents who requested travel information through the internet, by telephone, through magazine reader service cards and in-person visits. This study does not take into consideration the potentially large group of individuals that view travel materials and are then influenced to travel to the area, but do not provide traceable information.

The survey instrument was predicated on research for surveys with a similar purpose, and was further refined based on the experience of professionals in the tourism industry. The on-line survey was attractively designed and provided unique Adirondack-related incentives for completion. The first prize was a weekend for two at a luxury property. Five Adirondack chairs were also awarded as prizes. The opinion of the researchers is that incentives contribute to a relatively higher survey return rate without skewing data.

A total of 32,386 invitations to participate in the survey were sent by ROOST. The majority (78%) of these contacts were sent electronic requests to complete a survey online. To complement the sample, the remaining twelve percent of the sample were sent a postcard request to complete the survey online. One thousand four hundred (1,400) responses were received. Researchers removed those who indicated that they had no travel plans to Lake Placid, for a total of 1,348 complete responses.

This response rate (4.3%) is lower than previous years. The office switched contact systems during the last year and this is deemed to be largely responsible for the lower rate of return. Comparisons with other years are cautioned given this lower response rate, which has ranged from six to ten percent in other years. The project team is formulating a revised plan for improved survey response in future years.

Survey results were separated by a specific sub-group of respondents, those who are ROOST social media contacts (through Facebook and Twitter). At the end of each

section, brief analysis is provided if notable differences are found between these respondents and the non social media respondents. Full results of this analysis are found as Appendix C.

The project team for this research through TAC at SUNY Plattsburgh includes Victoria Zinser Duley, TAC interim director, John Parmelee, faculty member of the Department of Hotel, Restaurant, and Tourism Management, Theresa Bennett, TAC project support specialist and Lisa Cyphers, statistician.

Conversion Rate

The return on marketing investments is a key measure of this study, and is based substantially on measured conversion rate of visitors. The conversion rate is measured by comparing the number of traceable inquiries about the region in a given time period against the number of individuals that visited the region after receiving travel information. Direct traceable inquiries are defined and generated by ROOST marketing efforts, resulting in individuals who provide contact information. It is important to recognize that there were conceivably many more visits to the websites, or potential visitors who viewed travel information, than those who provided their contact information, and consequently many more visitors than what is tracked through the number of direct inquiries.

The following is an explanation of conversion analysis from Michigan State University²:

“Conversion studies estimate gross and net proportion of inquirers. Gross conversion rate involves the inquirers that took a trip to the destination after requesting travel information, while the net conversion rate involves the inquirers who traveled to the destination as a direct result of the travel information they received. Researchers and marketers use conversion studies to compare the effectiveness of advertising placements.

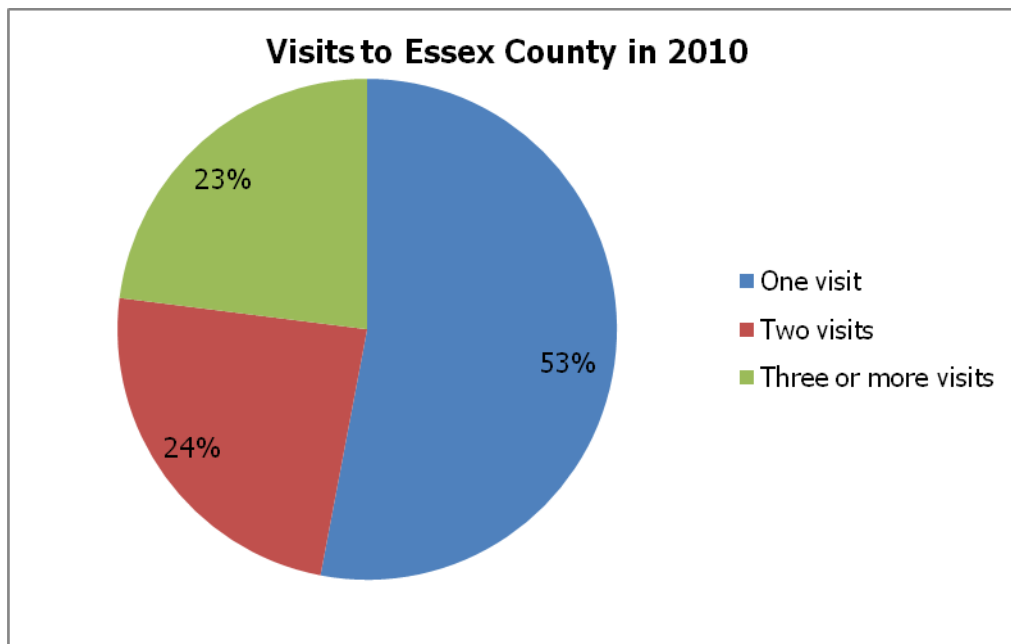
These studies base their estimates on gross, net and length of stay conversion rates. These rates provide information about the effectiveness of promotional material. The gross estimate refers to the amount of people inquiring for information and traveling to [Essex County] after receiving the information, while the net estimate is about the direct influence of the [Sustainable Tourism Office's] information on the decision to travel to [Essex County].

Return on Investment is determined by measuring visitor expenditures divided by the marketing dollars spent.

VISITOR SUMMARY INFORMATION

Sixty-seven percent (67%) of survey respondents included within the survey reported that they visited the region in 2010. The remaining one-third of respondents said that they intended to visit Essex County in the future.

Just over half of visitors came to Essex County one time in 2010, with the other half roughly split between two or three (or more) visits.



Respondents were not asked in this year's survey about the timing of future visits.

Social Media Respondents

This sub-group reported fewer one-time visits to the county, but a higher proportion of two-time visits during 2010. The number of respondents reporting three or more visits was equivalent to those reported by non-social media respondents.

RESPONDENTS' DEMOGRAPHIC PROFILE AND RESIDENCE

Income

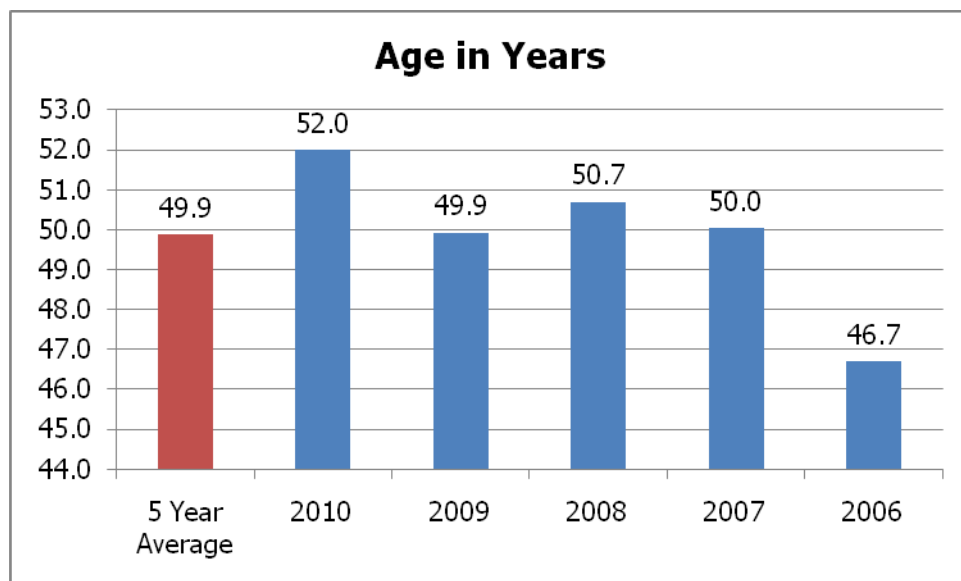
The survey requested respondents to enter their annual household income. The median household income of visitors this year is \$80,000.

In previous years respondents were requested to select an income range. For instance, in 2009 visitors' median income fell within the \$80,000 to \$124,999 range. The mid-point of this range, \$93,211, was used as the figure representative of income. The same methodology was used in years prior, so it is not possible to directly compare numbers across these years.

It is notable that the median range in past years included this \$80,000 value, which suggests that this year's median income may not actually be much lower than in recent years.

Age

The survey requested the birth year of responding visitors. The following chart depicts the mean age of leisure visitors to the region.



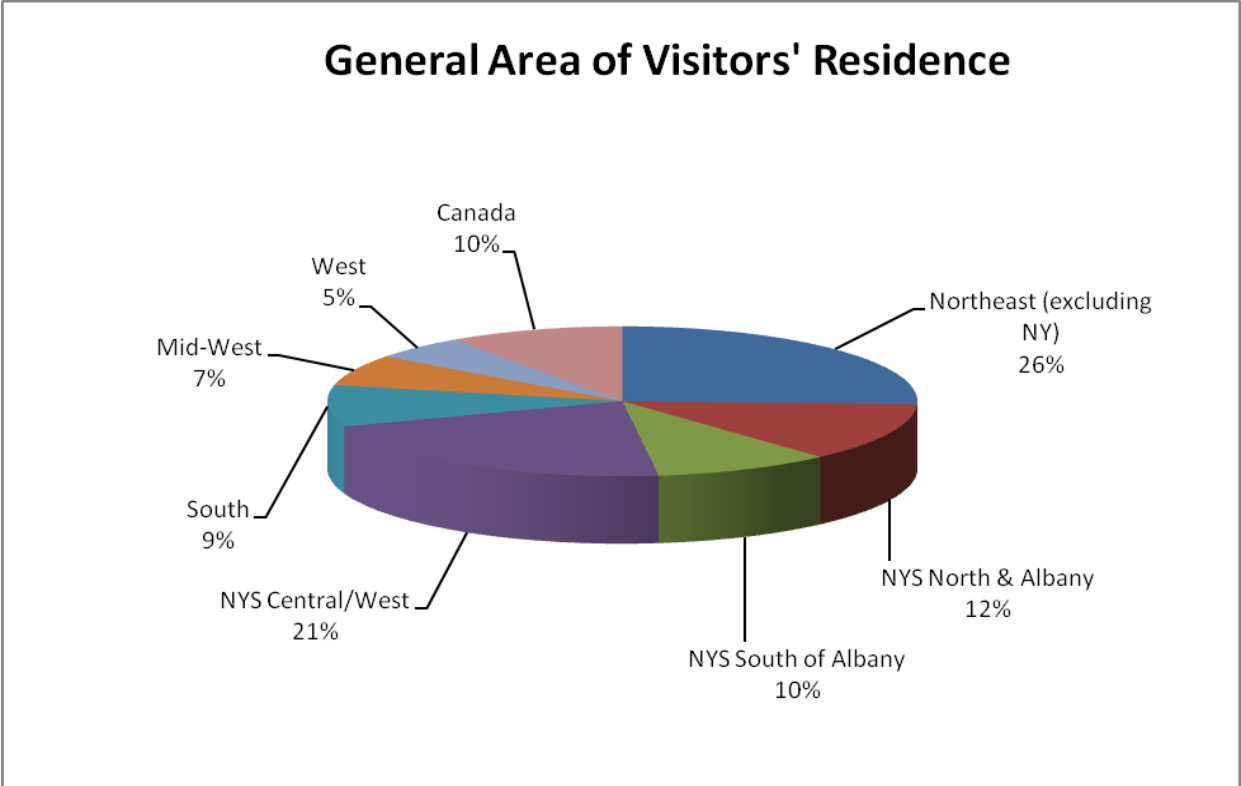
The mean age of visitors in 2010 was fifty-two (52) years old. This is slightly older than found in prior years. The five year average age is now roughly fifty (50). The *median age* in 2010 also was 52 years old.

Social Media Respondents

Not surprisingly, social media garnered younger visitors. This is only by a relatively small margin however. This group demonstrated a mean and median age of forty-nine (49) years old.

Area of Residence

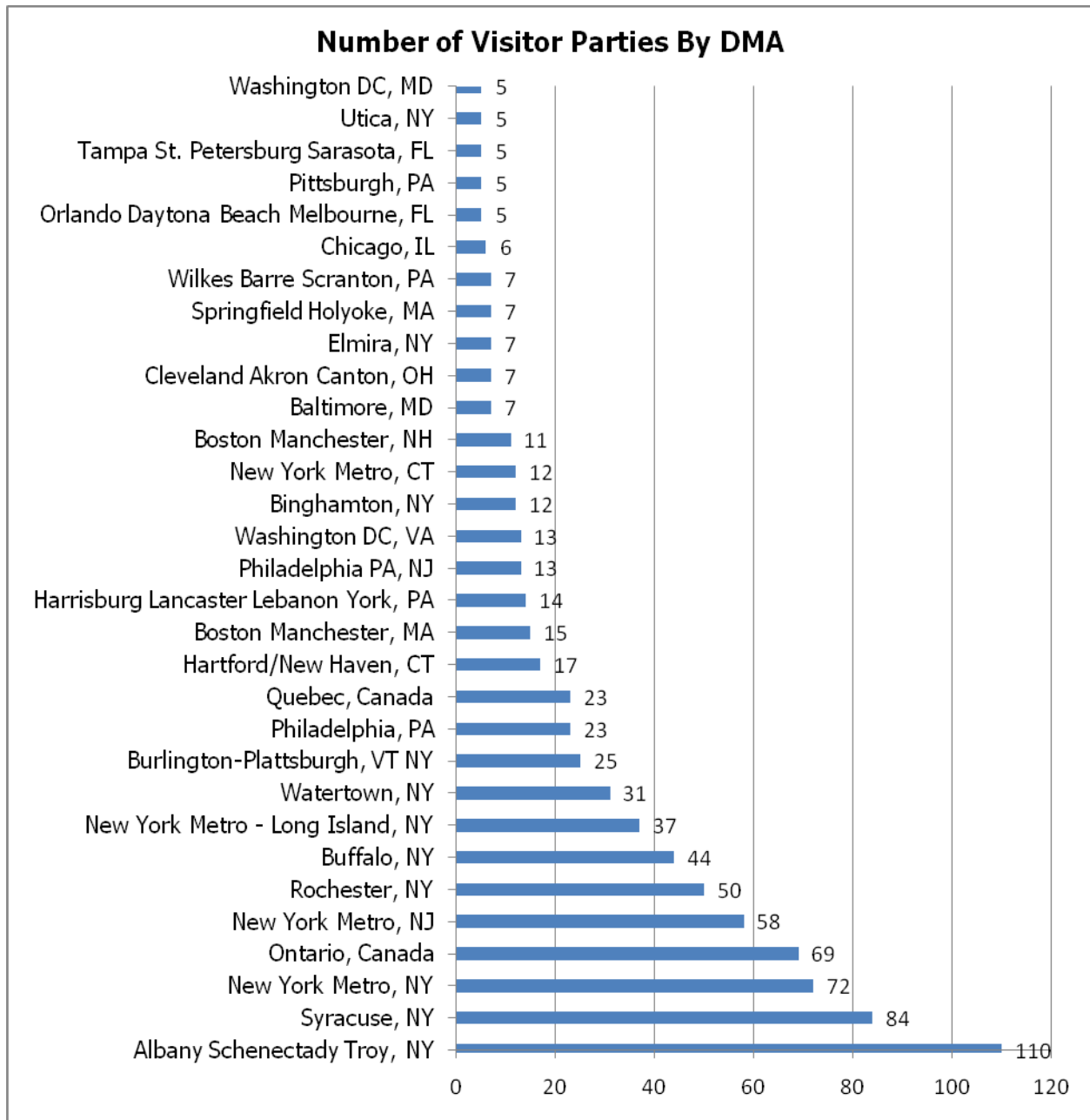
Survey respondents were requested to provide their zip code of residence, with generalized regions of residence provided in the chart below. In this breakout, the "Northeast" includes the Mid-Atlantic and New England states, the "South" includes Southeast and Southwest states, the "West" includes the Rocky Mountain and Pacific states and the "Mid-West" includes the Plains states and from Ohio to Missouri, north to the Canadian border.



Visitation by these broad regions shows a much smaller proportion of 2010 Canadian visits to Essex County than in the prior year. Nearly one-quarter (22%) of visitors in 2009 were Canadian. A smaller proportion of Northeastern visitors in this group came to Essex County in 2010 than in 2009 (reduced from 30%). Visitation from the Mid-West stayed consistent at 7% and a small increase was seen in the proportion of Western visitors (4% in 2009).

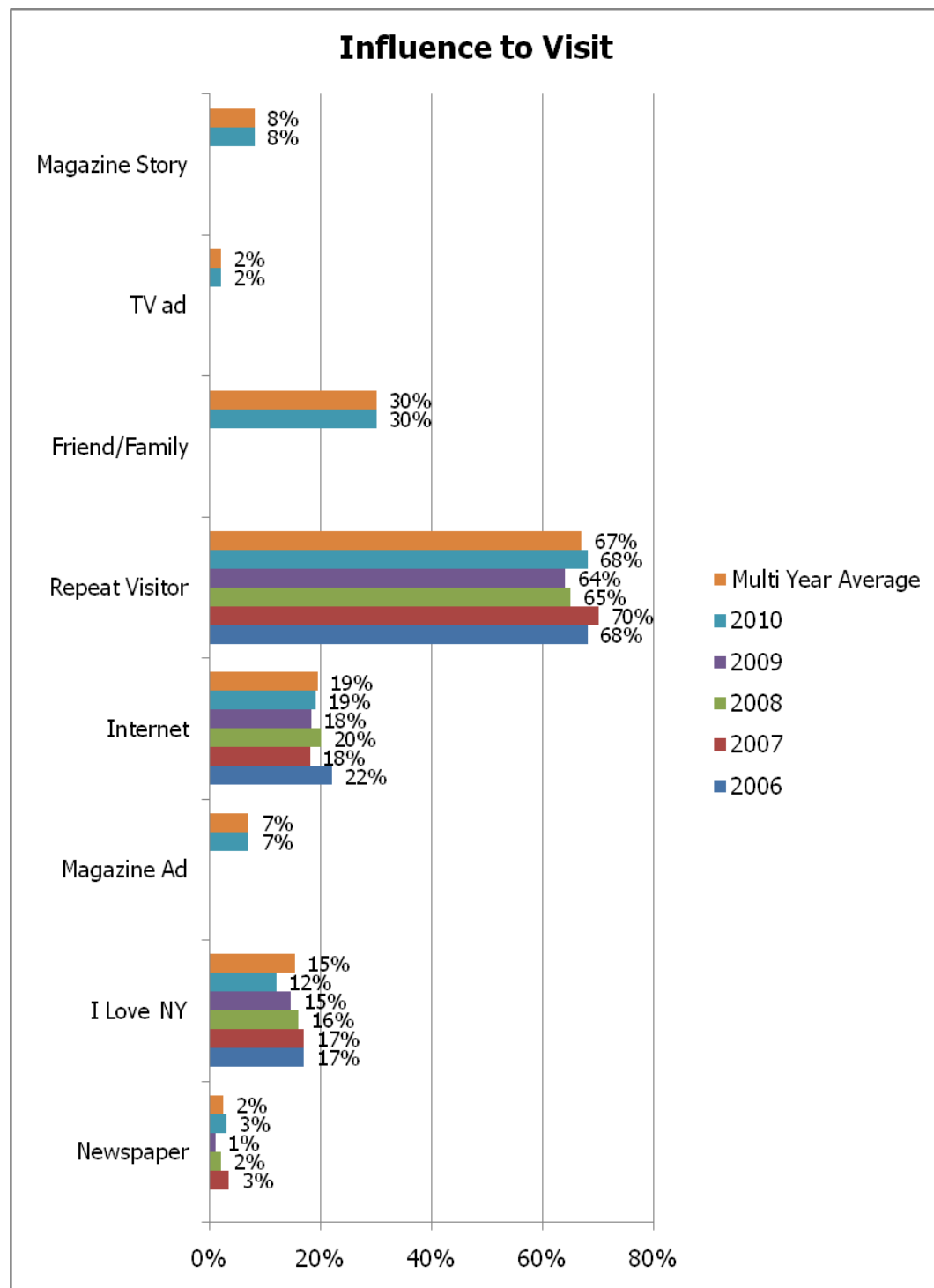
The greatest gains in Essex County visitation were found within New York State. Visitation from Central and Western New York State nearly tripled in proportion from 2009 visitation (from 8% to 21%). Steady gains in visitation among downstate visitors (up from 8%) and the Capital Region/North Country (up from 10%) are shown in 2010. This shows a greater draw of closer to home visitors in 2010, particularly those from within New York State.

The table below provides an analysis of visitor residence by Designated Marketing Area (DMA). Only those responses with five or more visitors in the party are displayed. The complete listing is found in Appendix A.



INFLUENCE TO VISIT THE REGION

Survey respondents were asked to select what inspired their visits to Essex County. The chart below illustrates the influencing factors for visitation during the past five years. Respondents were allowed multiple responses.



Multi-year responses are included where available; different categories were included in this year's survey. Prior visitation continues to be the strongest influencing factor, with 68% of respondents in 2010 reporting that a previous visit inspired their return trip. The category of "friend or family" is the second strongest factor of influence. Internet viewing remains constant as the next most common response.

I Love New York program draws are slightly lower this year, consistent with lower exposure and funding in this area in 2010. Magazine article references are reported to slightly edge out the influence of magazine advertisements.

The table below provides the five year averages of factors which have been reported over this duration:

	Repeat Visitor	Internet	I Love NY	Newspaper
Five-Year Average of Influencing Factors for Visits	67%	19%	15%	2%

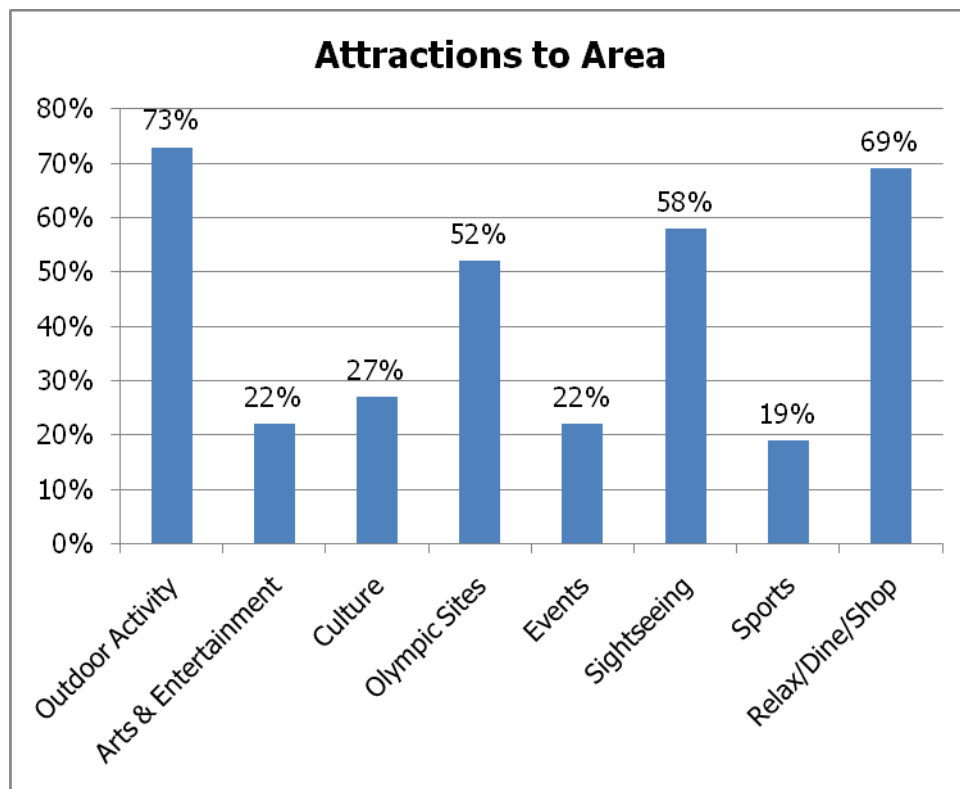
This demonstrates the continued strength of prior visits as the primary influence on future visitation.

Social Media Respondents

The social media respondent group were much more likely than non social media respondents to report prior visitation, friends/family in the area and (not surprisingly) social media as influencing factors for visits.

REGIONAL ATTRACTIONS

Survey respondents were asked to select the activities which attracted them to the Lake Placid/Essex County region from a provided list. They were also given the opportunity to list “other” draws not included. Multiple responses were permitted. The chart below demonstrates the draw of various attractions for respondents traveling in 2010.



Outdoor activities remain the largest draw to the area. Relaxing, dining and shopping rank a close second-most draw to the region.

Sightseeing and visiting Olympic sites are also reported as attractions by more than half of respondents. Visitation of Olympic sites has grown as a reported attraction over the past five years. Arts and entertainment, heritage and culture and events are also strong, steady draws.

The choices of attraction responses altered substantially in this year’s survey, so a full comparison to other years is incomplete. The following table however provides five year averages of these attractions by percentage of response, for those which were listed as choices over this time.

	5-year Average of Attraction Frequency Response
Outdoor activities	73%
Relax/dine/shop	65%
Sightseeing	58%
Olympic sites	43%
Heritage/culture	24%
Arts/culture	19%

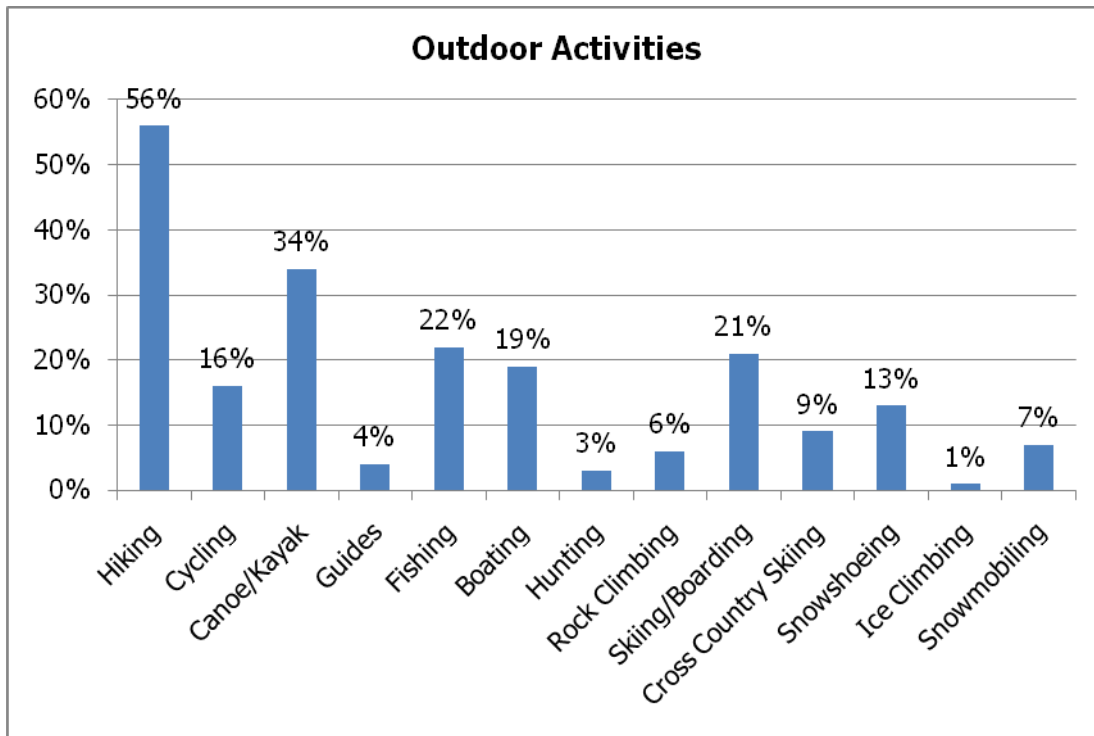
Within the 2010 data, frequent “other” attraction responses include: camping, family, golfing, weddings, photography, and the Ironman event. For a complete list refer to Appendix D (Open Ended Responses).

Social Media Respondents

This group of respondents reported even higher levels of attraction (by up to eight percent), to outdoor activities relaxing/shopping/dining, Olympic sites and events than non-social media respondents.

Outdoor Activities

Given the consistent popularity of outdoor activities as a draw to the region, a new question was added to this year’s survey. For those who selected “outdoor activities” as an attraction, a follow-up question was included to specify which activities were greatest draws. The following chart depicts the responses for attraction of various outdoor activities.



Hiking is the most popular reported outdoor activity draw, followed by canoeing/kayaking. Other popular activity draws are fishing, skiing/boarding and boating. Cycling and snowshoeing (notably higher than cross-country skiing) round out the activities which were draws to more than ten percent of respondents.

Among those who responded to the "other" category, some of the most common responses include: camping (32 responses), golfing (29 responses), ice skating or ice hockey, Ironman event, photography, swimming (20 responses) and motorcycle riding. See Appendix D (Open Ended Responses) for a complete list.

Social Media Respondents

These respondents reported even substantially higher attractions to hiking and canoeing/kayaking than non-social media respondents.

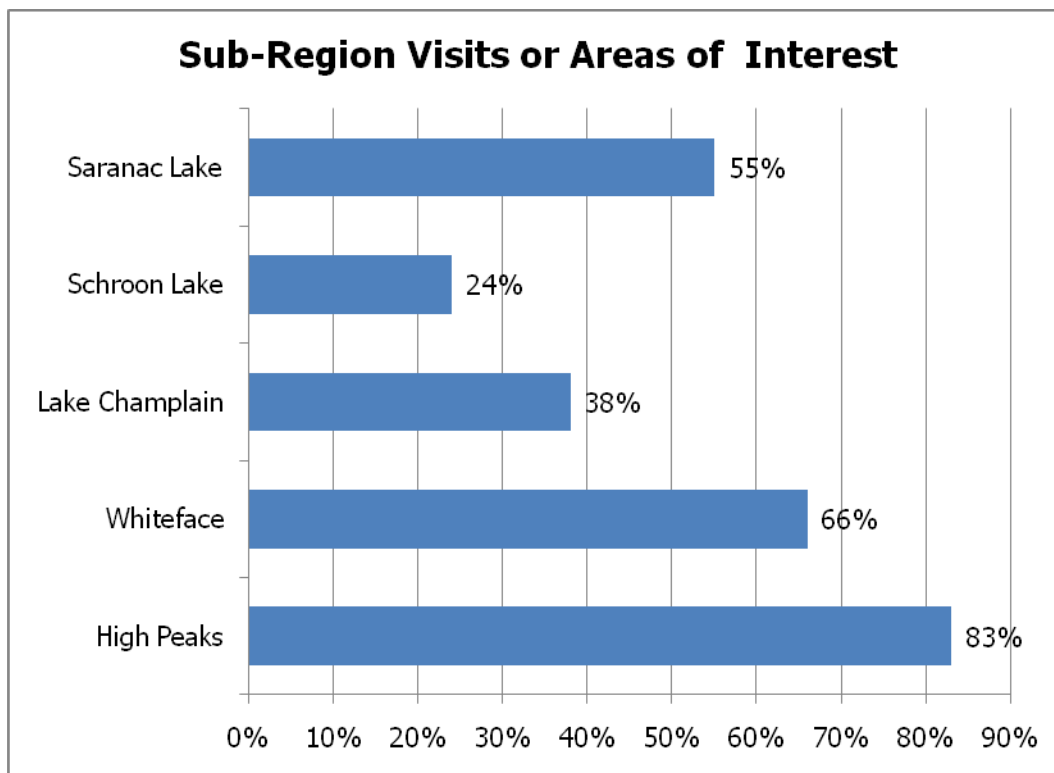
SUB-REGION VISITATION

Essex County is a large region geographically, comprising approximately 1,900 square miles. Visitors were asked in the survey which regions within the county they had visited, or were interested in visiting.

For the purpose of this question, the regions were defined as follows:

- Saranac Lake (Saranac Lake, Tupper Lake area)
- Schroon Lake (Schroon Lake, Newcomb, North Hudson area)
- Lake Champlain (Champlain coast, Ticonderoga, Westport area)
- Whiteface (Whiteface Mountain, Wilmington, Jay area)
- High Peaks (Lake Placid, Keene, Keene Valley area)

The following chart depicts the visits or planned future visits by these sub-regions of Essex County. Respondents were permitted to select as many areas of interest as they wished.



The most popular areas of interest reported were the High Peaks and Whiteface regions, followed by Saranac Lake. More than one-third of respondents chose Lake Champlain region as a draw, and nearly one-quarter of respondents reported interested in, or had visited the Schroon Lake area.

Social Media Respondents

This group showed a higher level of interest in all sub-regions, with the exception of Schroon Lake (which was equivalent among these groups). There was a notable level of higher interest in the Lake Champlain region by these respondents.

SATISFACTION WITH LEISURE TRAVEL-RELATED INFORMATION PROVIDED

The prospective visitor can access a full complement of travel information for Essex County through websites, magazines and toll-free numbers. Visitors were asked if they were satisfied with the information with which they were provided.

Ninety-five percent of respondents indicated that they found all of the information they were seeking from the Sustainable Tourism Office, with only 5% indicating dissatisfaction in this area. This represents consistent satisfaction levels in the quality, form and availability of tourism-related materials.

The table below demonstrates the consistent level of satisfaction with travel information provided over the past five years.

	5 Year Average	2010	2009	2008	2007	2006
Satisfied with travel information provided	95%	95%	95%	96%	95%	93%

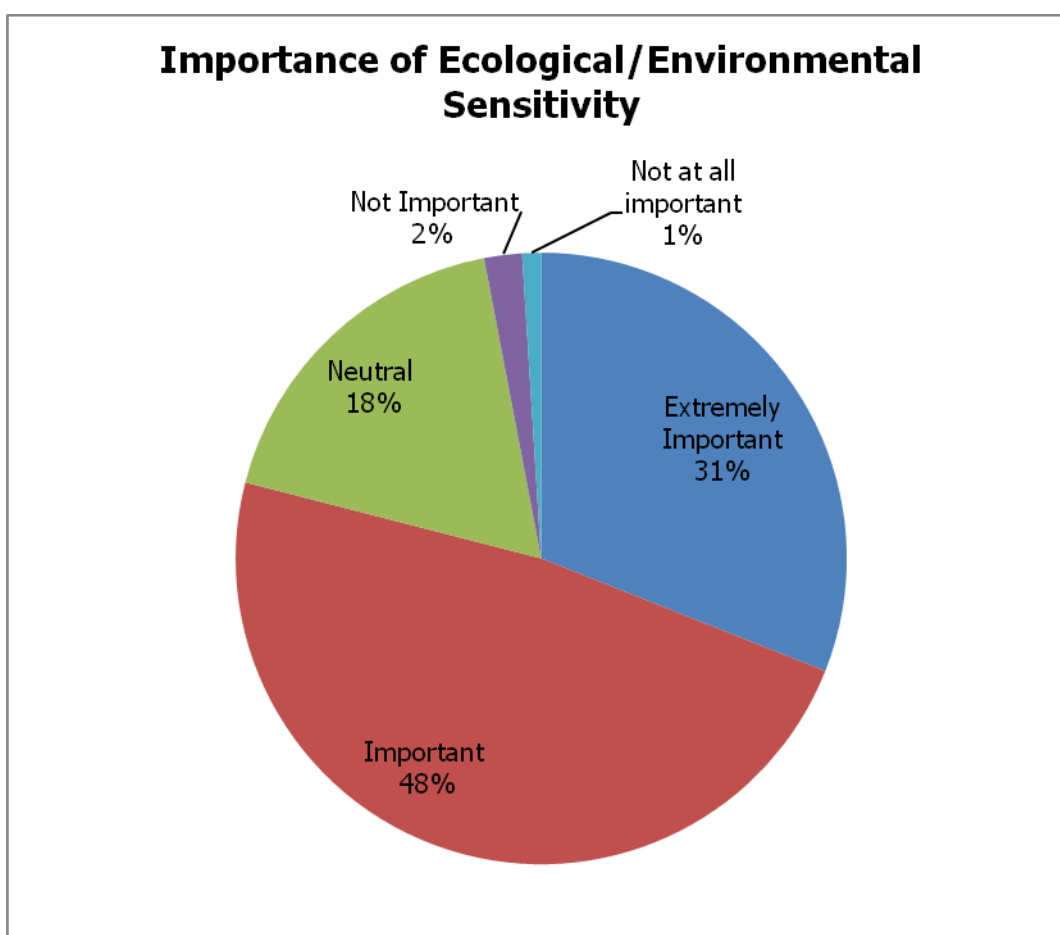
Social Media Respondents

This group reported a slightly higher (97%) level of satisfaction with travel information provided than non social media respondents.

IMPORTANCE OF ECOLOGICAL/ENVIRONMENTAL SENSITIVITY

Travel industry research shows an increasing base of tourists driven by “eco-tourism” experiences. Additionally, there are growing cultural expectations toward resource conservation efforts across all industries. The Regional Office of Sustainable Tourism is a leader in recognizing these shifts.

The survey asked travelers how important ecological or environmental sensitivity of their destination is to their travel planning. The following chart depicts a break-down of these responses.



Nearly half of all respondents stated that ecological or environmental sensitivity considerations are “important”. Nearly one-third stated that these considerations are “extremely important”. With almost eighty percent (80%) of visitor respondents stating that ecological or environmental considerations are (at least) an important consideration, this is an area of continued focus is validated.

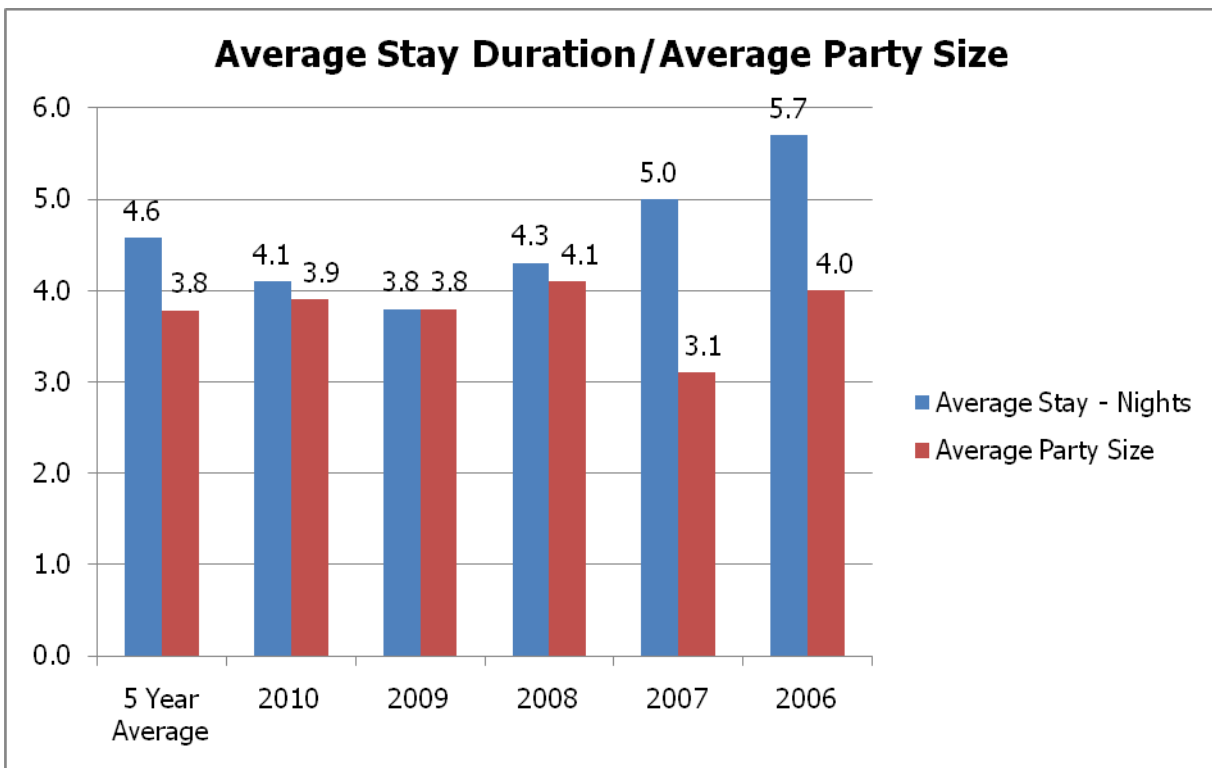
Social Media Respondents

The percentage of this group who indicate that this sensitivity is “extremely important” is much higher (by nine percent) than among non social media users. However, the percentage indicating that environmental sensitivity is “important” is lower, resulting in a roughly equivalent proportion among these groups who indicate that this issue is (at least) important.

VISIT DURATION, PARTY SIZE AND SEASON OF VISIT

Visitor Duration and Party Size

Survey respondents were requested to report the length of their visit to the region and on the size and composition of their visitor party. The following chart provides a summary of these two important factors.



The average reported stay for 2010 visitors is 4.1 nights. A daytrip is considered one day, but with zero nights stayed. The mean length of stay increased slightly this year from the 2009 average. The five year average for duration of stay is 4.6 nights, a number that has been decreasing slightly over the last four years.

The mean reported visitor party size for 2010 is 3.9 persons. This includes an average of 3.05 adults and 0.84 children. The adult party size decreased slightly from 2009, with the child party size staying nearly the same. This overall figure is very close to the five year average party size of 3.8 persons.

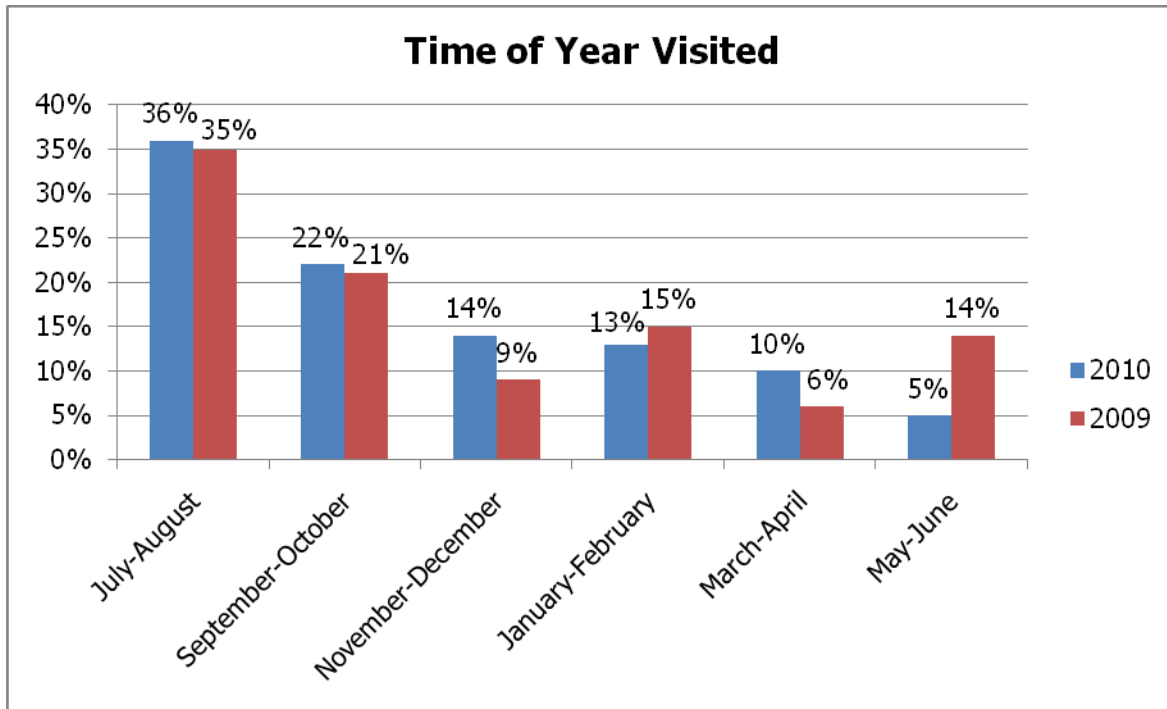
Social Media Respondents

Average duration of stay for social media respondents is slightly longer (by 0.5 night) than for non-social media respondents. Adult party size is also slightly larger for this

group (by 0.4 adult), while the child party size is slightly lower (by 0.15 child). This results in a slightly larger overall visitor party size among social media respondents.

Season of Visit

Survey respondents were asked about the timing of their visit to the region. The following chart depicts this information in comparison to 2009 responses.



As expected, peak summer is clearly a large proportion of visitation, followed by early fall/foliage season. These peak seasons show consistency among the two years measured by this survey. Mid-winter (January/February) also shows near consistency in proportion of visitation.

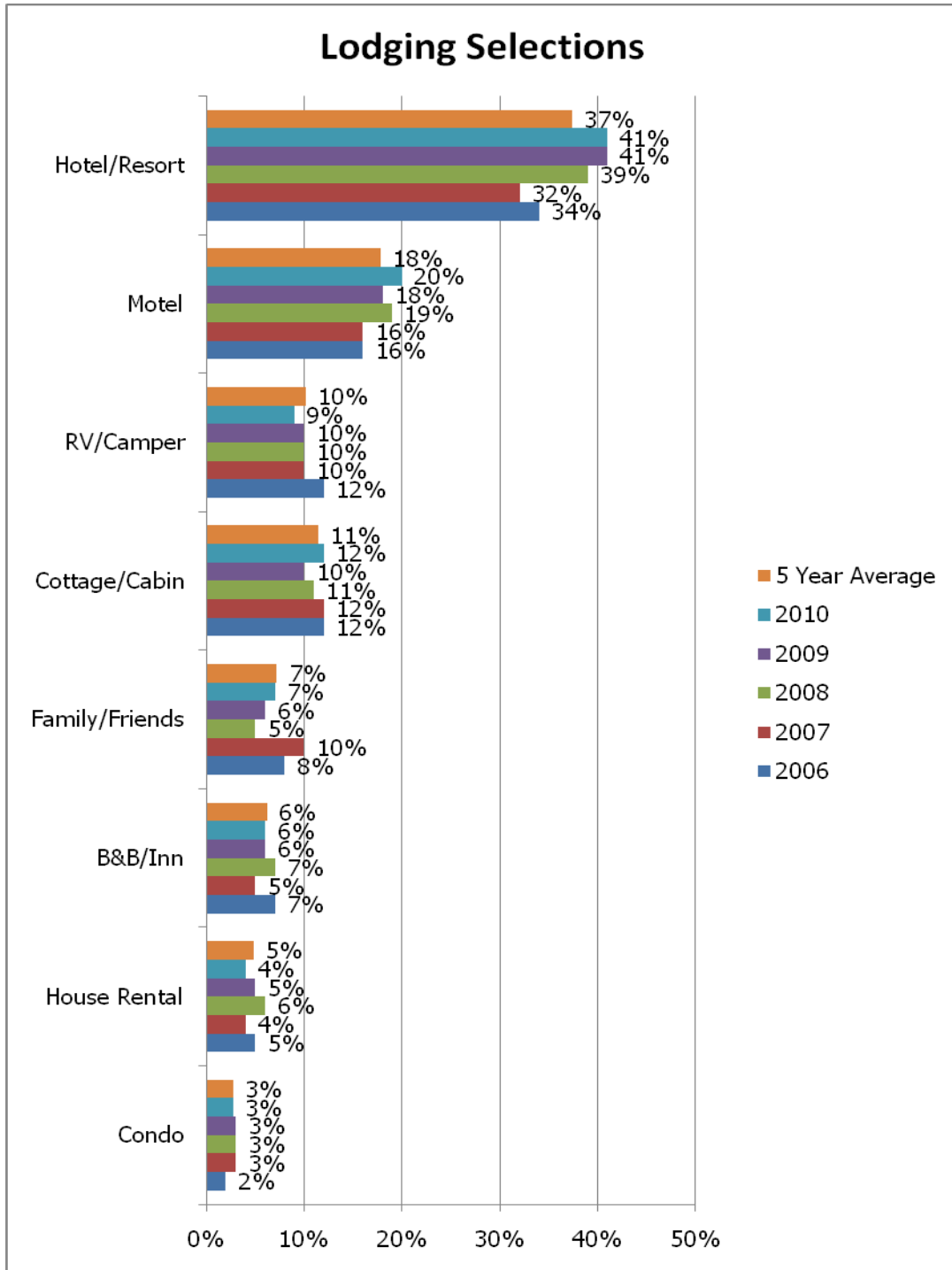
Interestingly however, the remaining "shoulder" seasons show much more fluctuation in visitation over the past two years. This will be interesting to examine over a longer time period to see if any trend or pattern may be found.

Social Media Respondents

This group reports more frequent visitation during the winter months of November to February and less frequently in the spring/early summer months of March to June, than non-social media respondents.

LODGING SELECTIONS

Visitor respondents were asked what type of lodging they used during their stay in Essex County. The following chart represents the results of reported lodging over the last five years.



Hotels remain the most popular choices by a wide margin of 2010 visitors (41%). Motels are the next most common choice for accommodation reported by visitors (20%), followed by cottages or cabins (12%).

Hotel and motel stays have exhibited slow growth in share over the last five years. Cottage/cabins , condominiums, house rentals and bed and breakfasts/inns have maintained a fairly consistent share of stays. RV/Camper stays appear to be decreasing slightly over the past five years.

The following table provides the averages of responses for lodging choices from 2006-2010:

	Five-year Average of Lodging Responses
Hotel	37%
Motel	18%
RV/Camper	11%
Cottage/ cabin	11%
Family/ friends	8%
B & B/ inn	6%
Private house rental	5%
Condominium	3%

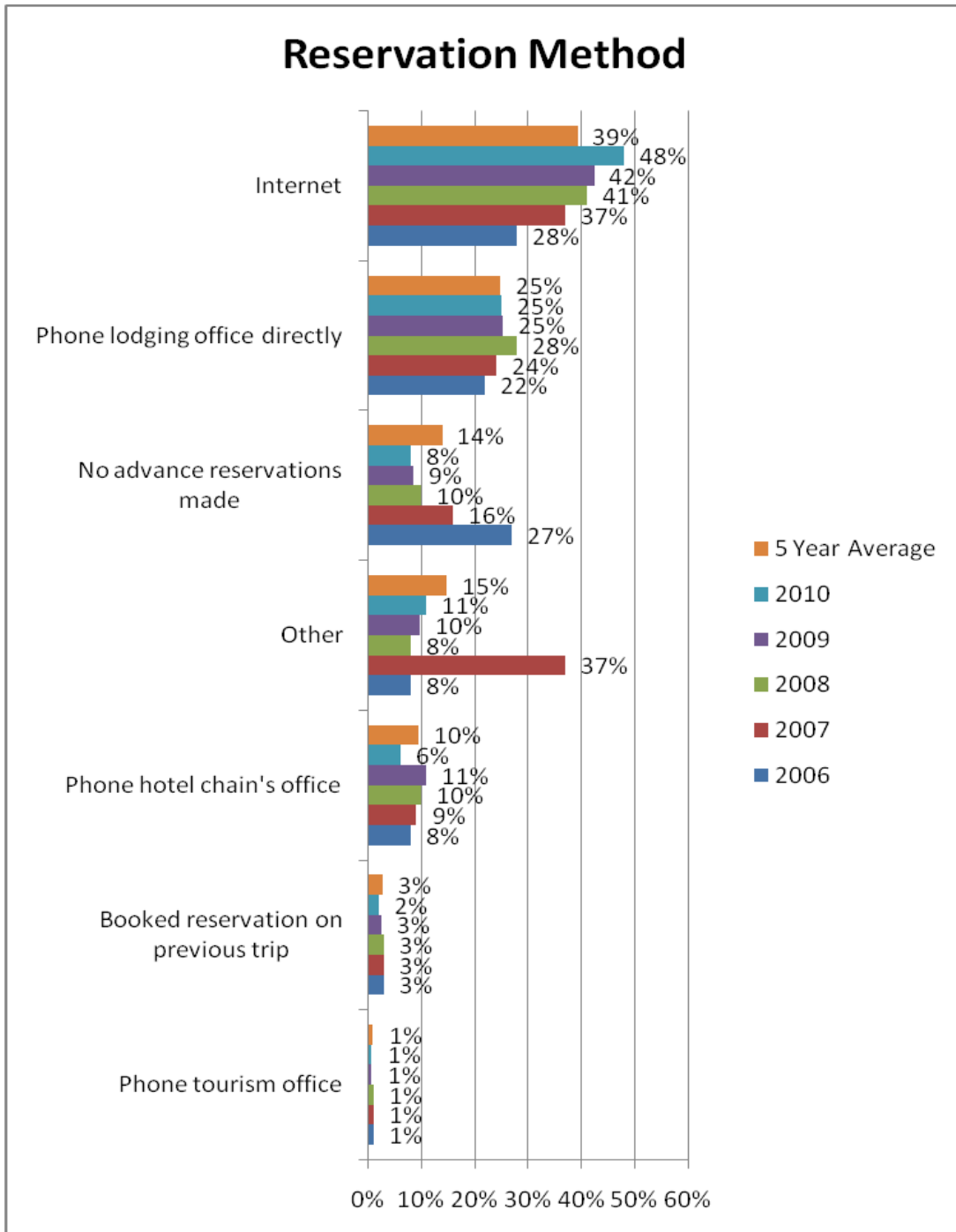
There are few shifts (only minor increases in the hotel and motel categories) in the five year averages of these lodging choices with the addition of 2010 traveler information.

Social Media Respondents

These respondents reported staying with family and friends and camping in an RV or tent much more frequently than non-social media respondents. Social media respondents also reported staying in a hotel or motel less frequently than non-social media respondents.

RESERVATION METHODS

Visitor respondents were asked about the different methods used to make their accommodation reservations. The following chart depicts the results of this inquiry over the past five years.



Internet reservations remain the most common response, with the popularity of this option growing substantially since 2009. Telephoning the property directly remains a strong, consistent secondary method of making reservations. Reservations reported through telephoning a hotel chain office dropped in this year's survey.

The following table shows the five year average of reservation methods.

	Five-year Average of Reservation Methods
Internet	39%
Phone Hotel/Motel/B&B/Realtor Directly	25%
No advanced reservations made	14%
Other	15%
Phone Hotel Chain's Office	10%
Booked reservation on previous trip	3%
Phone Tourism Office	1%

The only change over this time period average with the entry of 2010 data is a slight increase in preference for internet reservations.

Social Media Respondents

These respondents were more likely than non-social media respondents to report not making advance reservations or "other" reservation methods. They also (interestingly) were less likely to use internet or telephoning a property to make reservations.

LEISURE VISITOR SPENDING

Visitor respondents were asked to provide specific estimates of their daily spending in various categories during their 2010 trip to Lake Placid/Essex County. Estimated leisure visitor expenditures *per each visitor party per day* in 2010 decreased in all categories but transportation from last year. This brings overall reported spending levels back to just below that reported in 2008.

The following table provides a comparison of estimated expenses tabulated for the past five years, as well as the five year average.

Mean Essex County Visitor Expenditures

CATEGORY	2010 Mean Expenditure each Visitor Party per Day	2009 Mean Expenditure each Visitor Party per Day	2008 Mean Expenditure each Visitor Party per Day	2007 Mean Expenditure each Visitor Party per Day	2006 Mean Expenditure each Visitor Party per Day	5 Year Average Mean Expenditure each Visitor Party per Day
ATTRACTIONS/ EVENTS	\$39.02	\$45.75	\$40.26	\$31.14	\$26.44	\$36.52
ENTERTAINMENT	\$35.23	\$46.31	\$37.43	\$29.00	\$63.68	\$42.33
TRANSPORTATION	\$43.43	\$41.19	\$35.68	\$31.40	\$31.50	\$36.64
LODGING	\$138.93	\$170.91	\$164.16	\$129.20	\$122.98	\$145.24
MEALS	\$70.24	\$79.72	\$74.16	\$63.20	\$62.80	\$70.02
SOUVENIRS/ SHOPPING	\$48.50	\$53.53	\$49.60	\$39.20	\$43.00	\$46.77
ALL OTHER	\$55.81	\$81.50	\$51.59	\$33.00	\$53.00	\$54.98
AVERAGE DAILY EXPENDITURE	\$431.16	\$518.91	\$452.88	\$356.14	\$403.40	\$432.50

Social Media Respondents

Social media group respondents reported lower daily visitor spending in every category. These respondents provided an estimated \$379 average daily expenditure, 13% lower than the comparative non-social media respondent group. The lower expenditure level is moderated somewhat by the reported longer stay (0.5 night) by this group. This brings estimated spending levels among these two groups to within five percent of each other.

Expenses/Per Party Per Day for 2010	Social Media Respondents	All Other Respondents
Lodging	\$ 122.17	\$ 142.45
Meals	\$ 64.01	\$ 71.55
Shopping	\$ 41.30	\$ 50.00
Entertainment	\$ 31.80	\$ 35.95
Attractions/Events	\$ 30.86	\$ 40.74
Transportation	\$ 42.30	\$ 43.61
Other	\$ 46.33	\$ 57.58
Total	\$ 378.77	\$ 441.88

CONVERSION MEASUREMENT

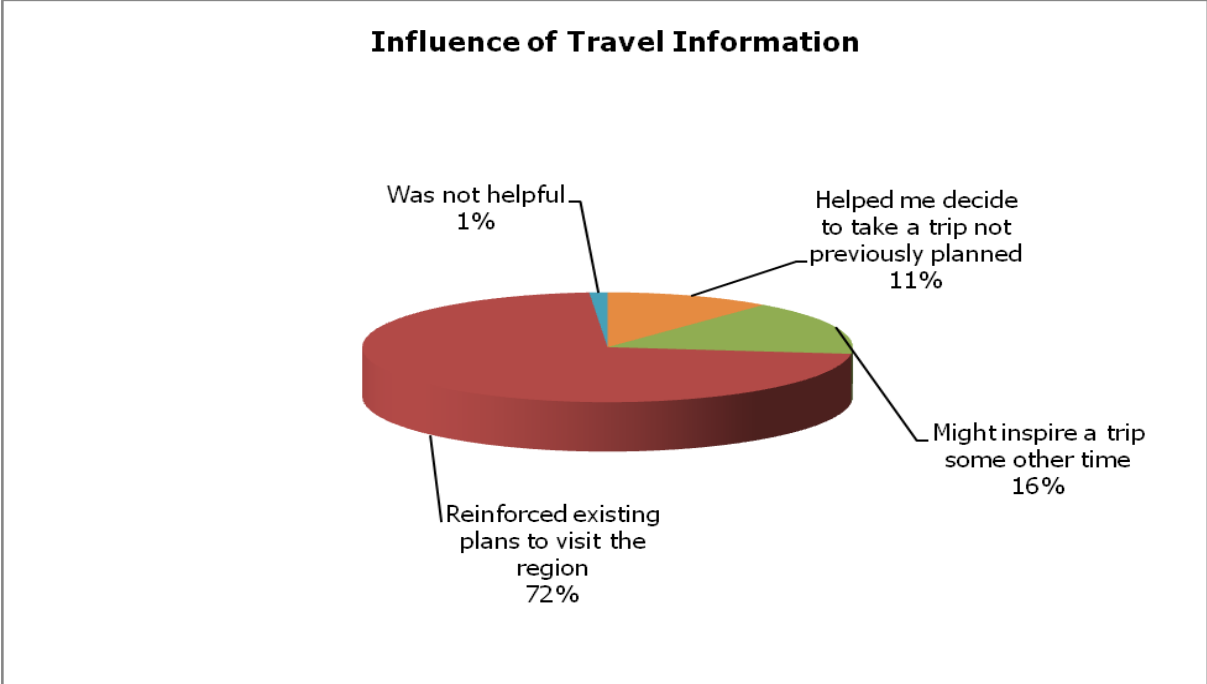
Motivational Influence of Travel Materials

The survey, as in years past, asked respondents to indicate whether the material they viewed either influenced or reinforced their motivation to travel to the area. This is an industry standard manner by which to measure influence of marketing materials on “conversion” of a possible traveler to an actual traveler.

For instance, the highly-regarded Travel Michigan Research Study² uses conversion to recognize inquiry and subsequent fulfillment by the marketing agency as the final measure of motivation to travel. Tourism advertising research distinguishes between two effects when measuring impacts: advertising that leads to inquiry and fulfillment and advertising that leads to inquiry and purchase. Inquiry/fulfillment involves the customer’s response to acquire information and inquiry/purchase involves the customers who ask for information and purchase the product.

This survey measured the “conversion rate” of potential travelers (using direct, traceable leads provided by the Sustainable Tourism Office) who viewed regional travel information, to those who actually traveled to Essex County. This was done by asking respondents to characterize the influence of the travel information they received in the following categories: “helped me decide to take a trip not previously planned”, “reinforced existing plans to visit the region”, “was not helpful”, “might inspire a trip some other time”, or “helped me decide not to visit the region”.

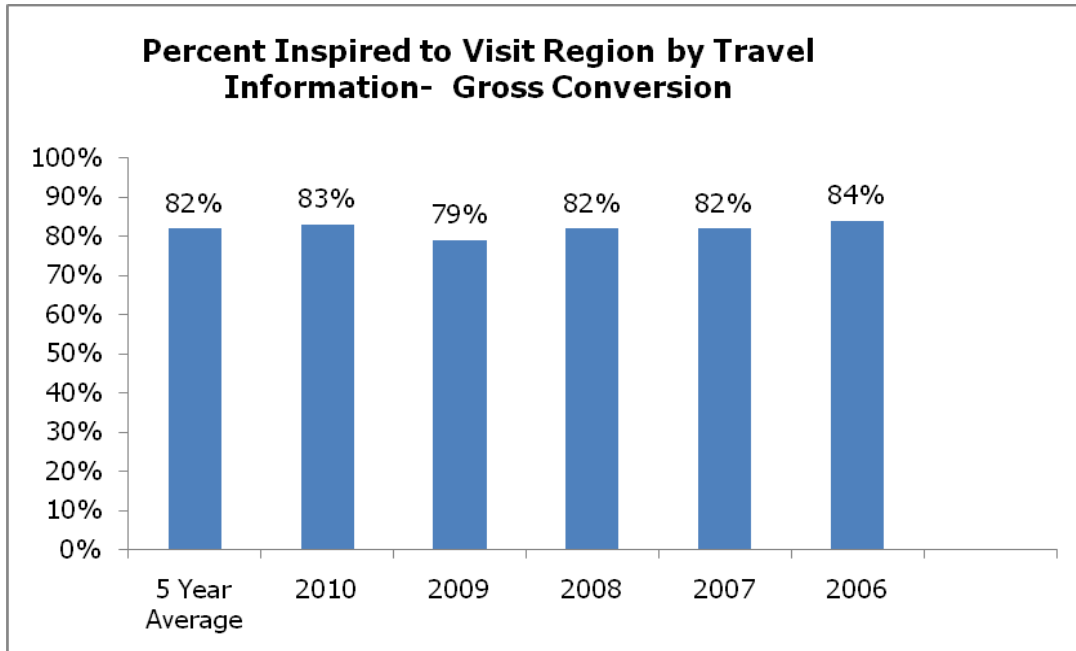
The “Influence of Travel Information” chart below demonstrates information with regard to inquiry/fulfillment, with most respondents indicating a positive impact of information received. Inquiry/purchase results are implied by this information, but cannot be completely validated as would be possible through an on-site intercept survey.



Eighty-two percent (82%) of respondents stated that the information or advertisements viewed either reinforced plans for a trip, or helped convince them to take a trip not yet planned. This is consistent with the *gross conversion rate* of travelers to the area. The *net conversion rate* includes only those travelers who replied that the information viewed helped them decide to make a trip not yet planned to the region. The gross conversion rate is used for quantitative analysis within the subsequent sections.

This *net conversion rate* is eleven percent (11%). Net conversion rates have ranged from 11% to 16% over the last five years. More conservatively, the net conversion rate can be used as a quantitative measure of return.

The table below depicts the gross conversion rates for the last five years. This demonstrates the percentage of visitors who have been positively influenced to travel to the area as a result of ROOST's information or contact.



The 2010 conversion rate is consistent with the average of this rate measured over the past five years, and is slightly higher than the conversion rate measured for 2009.

RETURN ON MARKETING INVESTMENT ANALYSIS

Marketing Costs per Visitor

Dividing the marketing costs for the region in the specified period, by the number of visitors to the region, results in estimated marketing expenditures per visitor.

The 2010 estimated visitor county is tabulated by multiplying the number of leads generated by ROOST (those who contacted their office during 2010 for information) by the conversion factor and by the average party size (determined by this survey).

$$60,684 \text{ (direct leads)} \times 83\% \text{ (gross conversion factor)} \times 3.9 \text{ (average party size)}$$

$$196,434 = \text{estimated visitors in 2010}$$

The estimated count of visitors likely influenced by ROOST to visit the region was 196,434 in 2010. This represents more than a twenty percent (20%) decrease in estimated visitation from 2009 (251,427). This is the result of the lower number of contacts, which is not altogether surprising given a strained economy and fewer marketing campaigns.

In 2010, Essex County spent \$1,364,634 for tourism marketing purposes from occupancy tax dollars. There were no state matching funds available, so this figure is substantially lower than in previous years. This yields a \$6.95 marketing cost per visitor (\$1,364,634/196,434). This is close to the 2009 marketing cost per visitor of \$6.22.

Multiplying the estimated number of visitors by the 4.1 average night stay provides an estimated 805,379 total visitor nights stayed in Essex County in 2010. This is markedly lower than last year's figure of 955,423.

Return on Investment

Return on investment (ROI) is measured by estimated expenditures generated by visitors divided by the total marketing dollars spent (from occupancy tax dollars).

The first step in this process is to estimate total revenue generated by leisure visitors to Essex County by multiplying the number of leads by gross conversion, daily visitor expenditures and length of stay:

$$60,684 \text{ (number of direct leads)} \times 83\% \text{ (gross conversion factor)} \\ \times \$431 \text{ mean visitor party expenditure per day} \times 4.1 \text{ (mean length} \\ \text{of stay in nights)}$$

$$= \$89,004,798 \text{ (total estimated revenue generated by visitors in 2010)}$$

The second step in this process is to divide the total revenue generated by visitors by the total marketing dollars spent:

\$89,004,798 (total estimated visitor revenue) / \$1,364,634 (total marketing dollars spent)

Return on Investment (ROI) = 65:1

The above calculations show that the total estimated revenue generated by visitors was over \$89 million in 2010. This produces an ROI of \$65 in leisure visitor-related revenue for every dollar of tourism marketing expenditures.

The following table depicts returns on investment from the past five years.

	5 Year Average	2010	2009	2008	2007	2006
Five- Year Essex County Occupancy Tax ROI	97:1	65:1	89:1	86:1	98:1	134:1

This is the lowest ROI measured in the past six years. A major reduction in marketing expenditures has occurred over the last two years with the elimination of regional cooperative spending in 2009 and with zero matching funds from the state in 2010. While the returns on investment are still impressive, budget reductions have clearly impacted the ability of tourism professionals at the ROOST in Essex County to target potential travelers to visit the region.

The following “Key Facts Derived from Survey Data” table depicts many of the quantitative results of the survey research and analysis, over the past five years. Budget break-down in the latter part of the survey is not applicable in several instances because of the lack of matching and cooperative funds.

ECONOMIC IMPACT ANALYSIS OF VISITOR SPENDING

Methodology

An economic impact analysis reflects the overall economy and measures cash flow to the private sector. IMPLAN economic modeling software was applied to estimate the impacts of visitor spending in Essex County in 2010 based upon this research. IMPLAN is an input-output modeling system created and maintained by Minneapolis, Minnesota-based MIG. It is a leading program internationally in providing spending impact analysis using specified multipliers by industry.

Every dollar spent by visitors to Essex County impacts the economy on three levels. The primary level of impacts are the *direct effects* of an expenditure. These are the immediate impacts to the beneficiary (such as a store owner whose patron buys an ice cream cone).

The store will then use this revenue to pay operation costs, their wholesale suppliers, utility bills, payroll, and so on. These are examples of secondary or *indirect effects*, of the sale of the ice cream.

Finally, the wholesaler in the scenario above will use a portion of this payment to pay their shipping company, and the utility provider will pay for upgrades to transmission lines. These are representative of tertiary or *induced effects*, representing the final quantifiable level of spending caused by the initial purchase of an ice cream cone by a visitor to the county.

The following model tracks all of these primary (direct), secondary (indirect) and tertiary (induced) impacts of visitor spending in Essex County. The best measures of economic impacts estimated through this analysis are *labor income* (added household income) impacts and *value added* (added gross regional product, or all of the dollars exchanged within the area) impacts from visitor expenditures. Another important impact of additional money spent within the local economy is job creation. These are also included within the following analysis.

Essex County Economic Summary

The economic model for Essex County in 2010 demonstrates a total Gross Regional Product (GRP) of \$1.1 billion according to IMPLAN analysis. Total personal income in the county is estimated at \$1.2 billion. Total employment is given at 18,204 jobs and average household income is given as \$81,967. IMPLAN largely uses U.S. Department of Commerce Bureau of Economic Analysis (BEA) data for its modeling.

A high level of economic activity in the county for two direct tourism-supported industries in Essex County is found through IMPLAN county-level modeling. The *food services and drinking places* sector is estimated to provide 1,116 jobs in Essex County and \$26 million in labor income (household spending) expenditures. This is the second largest employment sector in the county (after government).

Hotels and motels provide 659 jobs in Essex County and \$25 million in labor income dollars. This is the fifth largest employment sector in the county (after two categories of government, nursing and residential care facilities and food services and drinking places). It is important to keep in mind that the BEA uses total job numbers, NOT full time equivalents for employment figures.

Model Assumptions

A commodity change activity (based on this tourism model) was used to estimate the effects of 2010 visitor spending in Essex County. Inputs into this model included the following specifications:

- Estimated visitation: 196,434
- Total estimated spending per visitor: \$453
(\$431 spent per visitor party per day x 4.1 average night stay/ 3.9 average visitor party size)
- The spending model attributes total spending in the following proportions: 9% to attraction/events, 8% to entertainment, 10% to transportation, 32% to lodging, 17% to meals, 11% to shopping and 13% to "other"
- Assumes that nearly all travel to the area is by private vehicle (in a future study it may be advisable to measure different methods of travel to add to modeling)
- Estimates that half of gasoline expenditures for travel are made outside of Essex County
- Assigns attraction/event expenditures to the "other amusement and recreation" sector
- Assigns "other" expenditures to the "general retail" sector
- Assigns entertainment expenditures to the "museum, heritage and recreation services" sector
- Adds margins to each retail sector (gasoline stations and general retail stores)
- Event year set to 2010 for consistent dollar valuation

Model Impact Results

The following table displays results of economic impact modeling for visitor spending in Essex County in 2010.

Economic Impacts to Essex County from 2010 Visitor Spending

	Employment	Labor Income	Value Added/GRP
Direct effects	789	\$23.9 million	\$40 million
Indirect effects	86	\$3.4 million	\$5.8 million
Induced effects	105	\$3.5 million	\$6.8 million
Total:	980	\$30.8 million	\$52.6 million

This means that almost one thousand additional jobs were created within the county, across all industries, by visitor spending. This is in addition to existing tourism-related jobs. An estimate of nearly \$31 million additional household spending (labor income) in the county was generated by visitor spending in Essex County. An estimate of nearly \$53 million additional total spending in the county (value added or GRP) was provided by visitor spending within the county, based on the 2010 visitor model.

Economists vary in opinion regarding which economic measure is most representative of new dollars in the economy- labor income or value added spending. Labor income would represent the more conservative model, while the value-added or GRP would provide a more robust impact of total new dollars in the county economy. Both impacts are provided in the above analysis. It is accurate to provide either given an explanation of what they include.

IMPLAN analysis also provides a summary of top industry impacts by this visitor spending model. The top ten industries affected by this visitor spending, by employment impact, include:

- Food services and drinking places: 270 additional jobs
- Hotels and motels: 239 additional jobs
- Retail stores (general merchandise): 123 additional jobs
- Other amusement and recreation industries: 105 additional jobs
- Museums, historical sites and parks: 77 additional jobs
- Retail stores (gasoline stations): 13 additional jobs
- Real Estate establishments: 12 additional jobs
- Retail stores (food and beverage): 8 additional jobs
- Advertising: 6 additional jobs
- U.S. Postal Service: 6 additional jobs

Clearly, the tourism industry provides a substantial economic boost to the regional economy through its employment and spending impacts across all sectors.

KEY FACTS DERIVED FROM SURVEY DATA

	5 Year Average	2010	2009	2008	2007	2006
Number of Completed Survey Respondents	1,896	1,348	1,526	2,663	2,118	1,823
Average Income of Respondents	\$89,190	\$80,000	\$93,211	\$92,213	\$86,585	\$95,543
Mean Age of Respondents	50	52	49.9	51.7	50	46.7
Direct Inquiries to Essex County via the Bureau	84,063	60,604	83,753	84,993	96,197	95,697
Average Night Stays/ Party	4.6	4.1	3.8	4.3	5	5.7
Overnight Visitor Stays	1,324,565	805,379	955,423	1,228,708	1,225,000	1,767,000
Average Party Size	3.8 Persons	3.9 Persons	3.8 Persons	4.1 Persons	3.1 Persons	4.0 Persons
Conversion Factor Rate	82%	83%	79%	82%	82%	84%
Average Daily Expenditure per Party	\$432.72	\$431.16	\$518.91	\$452.87	\$356.00	\$403.40
Total Leisure Visitor Expenditures	\$134,910,305	\$89,004,798	\$130,490,357	\$135,757,449	\$140,409,141	\$179,141,209
Essex County Occupancy Tax and Matching Funds	Not Available	Not Available	\$1,563,032	\$1,663,976	\$1,552,346	\$1,382,583
Occupancy Tax and Matching Funds ROI	Not Available	Not Available	83:1	82:1	90:1	129:1
Essex County Occupancy Tax	\$1,396,953	\$1,364,634	\$1,465,665	\$1,571,777	\$1,439,023	\$1,327,990
Essex County Occupancy Tax ROI	94:1	65:1	89:1	86:1	98:1	134:1
Total Bureau Budget	\$1,951,349	\$1,941,061	\$1,915,274	\$2,065,427	\$2,064,900	\$1,884,161
Total Bureau Budget ROI	69:1	46:1	68:1	66:1	68:1	95:1
Total Budget & Regional Co-op	Not available	Not available	\$2,714,634	\$2,860,642	\$2,742,616	Not available
Total Budget & Regional Co-op ROI	Not available	Not available	48:1	47:1	51:1	Not available

SOURCES

1. Economic Impact of Expenditures By Tourists On Northern New York State. Northern NY Tourism Travel and Tourism Research Center. 2006.
<http://www.nnytourismresearch.org/nnytourismresearch/reports.asp>
2. Conversion Studies White Paper, by Kiki Kaplanidou, and Dr. Christine Vogt, Assistant Professor, Department of Park, Recreation and Tourism Resources, Michigan State University, March 2003.

APPENDIX A: VISITOR PARTY RESPONDENTS BY DMA

DMA	Visited in 2010
Albany Schenectady Troy, NY	110
Syracuse, NY	84
New York Metro, NY	72
Ontario, Canada	69
New York Metro, NJ	58
Rochester, NY	50
Buffalo, NY	44
New York Metro - Long Island, NY	37
Watertown, NY	31
Burlington-Plattsburgh, VT NY	25
Philadelphia, PA	23
Quebec, Canada	23
Hartford/New Haven, CT	17
Boston Manchester, MA	15
Harrisburg Lancaster Lebanon York, PA	14
Philadelphia, NJ	13
Washington DC, VA	13
Binghamton, NY	12
New York Metro, CT	12
Boston Manchester, NH	11
Baltimore, MD	7
Cleveland Akron Canton, OH	7
Elmira, NY	7
Springfield Holyoke, MA	7
Wilkes Barre Scranton, PA	7
Chicago, IL	6
Orlando Daytona Beach Melbourne, FL	5
Pittsburgh, PA	5
Tampa St. Petersburg Sarasota, FL	5
Utica, NY	5
Washington DC, MD	5
Albany Schenectady Troy, MA	4
Philadelphia, DE	4
Providence New Bedford, RI	4
Dallas Ft. Worth, TX	3
Denver, CO	3
Erie, PA	3
Flint Saginaw Bay City, MI	3
Los Angeles, CA	3

Toledo, OH	3
Charlotte, NC	2
Elmira, PA	2
Grand Rapids Kalamazoo Battle Creek, MI	2
Green Bay Appleton, WI	2
Houston, TX	2
Indianapolis, IN	2
Miami Ft. Lauderdale, FL	2
New York Metro, PA	2
Norfolk Portsmouth Newport News, VA	2
Portland Auburn, ME	2
Reno, NV	2
Topeka, KS	2
Atlanta, GA	1
Augusta, SC	1
Birmingham Anniston Tuscaloosa, AL	1
Bluefield Beckley Oak Hill, VA	1
Burlington-Plattsburgh, NH	1
Champaign Springfield Decatur, IL	1
Charlottesville, VA	1
Cheyenne Scottsbluff, WY	1
Chicago, IN	1
Cincinnati, IN	1
Cincinnati, OH	1
Columbus, OH	1
Dayton, OH	1
Detroit, MI	1
Duluth Superior, MN	1
Ft. Myers Naples, FL	1
Greensboro High Point Winston Salem, NC	1
Greenville Spartanburg Ashville Anderson, NC	1
Greenville Spartanburg Ashville Anderson, SC	1
Hattiesburg Laurel, MS	1
Honolulu, HI	1
Jacksonville Brunswick, FL	1
Johnstown Altoona, PA	1
Kansas City, MO	1
Knoxville, TN	1
Lincoln Hastings Kearny, NE	1
Milwaukee, WI	1
Minneapolis St. Paul, MN	1
Myrtle Beach Florence, SC	1
Norfolk Portsmouth Newport News, NC	1
Panama City, FL	1

Phoenix, AZ	1
Portland, OR	1
Puerto Rico, PR	1
Raleigh Durham Fayetteville, NC	1
Sacramento Stockton Modesto, CA	1
Salisbury, MD	1
San Antonio, TX	1
San Diego, CA	1
Sioux City, NE	1
Tri Cities VA ~ TN, TN	1
Tucson Sierra Vista, AZ	1
Youngstown, OH	1

APPENDIX B: TABLES- FIVE-YEAR AVERAGES

Demographics	5 Year Average
Mean Income	\$89,190
Mean Age of Respondents	50.0

Influence to Visit Region	5 Year Average
Repeat	67%
Internet	19%
I Love NY	15%
Newspaper	2%

Reservation Method	5 Year Average
Internet	76%
Phone Hotel/Motel/B&B/ Realtor Directly	25%
No advanced reservations made	14%
Other	15%
Phone Hotel Chain's Office	10%
Booked reservation on previous trip	3%
Phoned Tourism Office	1%

Regional Attractions	5 Year Average
Outdoor activities	73%
Relax/dine/shop	65%
Sightseeing	58%
Olympic sites	43%
Heritage/culture	24%
Arts/culture	18%

Travel Information **5 Year Average**

Satisfied with Information	95%
Inspired to Visit Region	82%

Visit Information **5 Year Average**

Duration	4.6 Nights
Party Size	3.8 Persons

Lodging Selections **5 Year Average**

Hotel	37%
Motel	18%
RV/Camper	11%
Cottage/Cabin	11%
Family/Friends	8%
B & B/Inn	6%
Private House Rental	5%
Condominium	3%

Category	5 Year Average Mean Expenditure Essex County Per Visitor Party per day
Attractions	\$36.52
Entertainment	\$42.33
Transportation	\$36.64
Lodging	\$145.24
Meals	\$70.02
Souvenirs	\$46.77
All Other	\$54.98
Average Daily Expenditure	\$432.50

APPENDIX C: COMPARISON OF DATA FOR SOCIAL MEDIA RESPONDENTS VS. NON-SOCIAL MEDIA RESPONDENTS

Question/Response	Social Media	All Other
Did you travel here in 2010?	(215 people)	(1133 people)
Yes	67%	67%
No, but plan to visit in future	33%	33%
How many in your travel party?		
Adults	3.56	2.95
Children	0.71	0.87
How many nights did you stay?		
	4.48	4.04
How many leisure trips here in 2010?		
1	44%	55%
2	31%	23%
3 or more	25%	22%
Expenses/Per Day		
Lodging	\$ 122.17	\$ 142.45
Meals	\$ 64.01	\$ 71.55
Shopping	\$ 41.30	\$ 50.00
Entertainment	\$ 31.80	\$ 35.95
Attractions/Events	\$ 30.86	\$ 40.74
Transportation	\$ 42.30	\$ 43.61
Other	\$ 46.33	\$ 57.58
Total	\$ 378.77	\$ 441.88
How did you make reservations?		
Internet	45%	48%
Phoned the lodging office directly	22%	26%
Phoned the hotel chain office	6%	6%
Booked reservation on previous trip	2%	2%
Phoned the Tourism Office	0%	<1%

Other method	14%	11%
No advance reservations were made	11%	7%
Lodging choices		
Hotel	31%	39%
Motel	18%	21%
Cabin/cottage	7%	13%
RV/tent	12%	9%
Family/friends	17%	5%
House rental	8%	6%
B&B/Inn	4%	5%
Condo	3%	3%
Time of Year Visited		
July-August	34%	36%
September-October	22%	22%
November-December	14%	9%
January-February	18%	13%
March-April	4%	6%
May-June	8%	14%
Why did you visit?		
Been before	82%	65%
I Love NY guide	8%	13%
Friend/family	41%	28%
Internet	15%	20%
Magazine ad	5%	7%
Newspaper ad	3%	2%
TV ad	<1%	3%
Magazine story	6%	9%
Social Media	11%	2%
Area of interest		
High Peaks	89%	82%
Whiteface	73%	65%
Lake Champlain	41%	37%
Schroon Lake	20%	24%
Saranac Lake	61%	54%
What attracted you to the area?		
Outdoor activity	79%	73%
Arts & Entertainment	25%	21%

Culture	27%	27%
Olympic sites	61%	50%
Events	32%	21%
Sightseeing	62%	58%
Sports	18%	20%
Relaxing	77%	67%
What outdoor activity attracted you to the area?		
Hiking	63%	55%
Cycling	20%	16%
Canoe/Kayak	41%	33%
Guides	6%	4%
Fishing	21%	22%
Boating	20%	19%
Hunting	3%	3%
Rock climbing	7%	6%
Skiing/Boarding	25%	21%
Cross Country Skiing	9%	8%
Snowshoeing	14%	13%
Ice climbing	1%	1%
Snowmobiling	8%	6%
How important was ecological/environmental sensitivity in your travel destination?		
Extremely important	39%	30%
Important	40%	50%
Neutral	18%	18%
Not important	2%	2%
Not at all important	1%	1%
Did you find all the information your were looking for?		
Yes	97%	95%
No	3%	5%
Level of influence of information		
Helped me decide to take a trip I had not previously planned	10%	11%

Reinforced existing plans to visit region	77%	71%
Might inspire a trip at some other time	13%	17%
Helped me decide not to visit region	0%	<1%
Was not helpful	<1%	1%
Median Age	49	52
Median Annual Household Income	\$ 80,000	\$ 80,000

APPENDIX D: OPEN-ENDED RESPONSES

Open ended question replies:

13. What activities attracted you to the region?

4 wheeling
a wedding
Adirondack 46er Annual Meeting
Adirondack Museum
Adult Skating Week at the Olympic Center
annual party
attractions
Balloon fest
beach-mirror lake
beauty of the mountains and the town
bike trip
biking
Boat ride
boat through Ausable Chasm
bobsled
Bobsled/skull
breathing fresh air!
breathtaking beauty
Brew Pubs, Breweries
business related
camping
camping
camping
camping
camping
Camping
Camping
camping
camping
camping
Camping
Camping and hiking highpeaks
Canam hockey camp
Can-AM Rugby
Car Show
church camp
climbing
college visits
conference
Considered relocating there.

convention
Faliage
fall colors
fall foliage
family
Family
family
family
family & friends
family and North Pole(Santa)
firgure skating
Funeral
golf
golf
golf
golf
golf
Golf
golf
Golf
golf, golf,golf
golfing
golfing
golfing
hiking
Horse Shows
ICE CLIMBING
ice show
ILBBO
Intergenerational Program
Ironman
Ironman
Ironman
ironman
Ironman Lake Placid
Ironman Lake Placid
lacrosse tournament
Lake Placid Brew pub
Life long community of friends
LOVE EVERYTHING WE SAW.
MOTOCYCLE RIDING
motorcycle rides
Motorcycle Riding
motorcycling

Moving home
My son played hockey at the CanAm school
natural environment
NATURE PHOTOGRAPHY
North Pole
North Pole
NYSPPF annual
octoberfest
photo ops
photography
Photography
Photography
Pirate Weekend Higley
play in snow
Pristine Wilderness
real estate looking
relaxing, reading, walking, very short hikes
Romance
Santa Claus Land
Santa's Workshop
shopping, ice skating
shops
sitting!!!! smiling!!!
ski areas
SKIING, CROSS COUNTRY AND DOWNHILL PLUS SNOWSHOEING.
snow
snowshoe,skiing,beauty
snowshoeing
SOCCER TOURNAMENT
socializing
son in college
special tour
swimming
Taking pictures of birds,animals or anything that is unusual to me.
The Ads are a unique, relaxing place that restores and refreshes and relaxes us.
townwid garage sales
Trails for hiking
train ride
Triathlon Training & Ironman
Tried to do a boat tour but not available despite being told tours would be available
VR ing
wedding
white water rafting

Wine Tasting
WIneries
winery
work

14. Which outdoor activities attracted you to the region?

ADVENTURE PARKS
Backpacking
biking
bird and wildlife watching
Bird Watching
bobsled
bobsled
bobsled
Bobsled and luge
bobsled/skull
Bobsledding
camping
Camping
Camping
camping
camping
camping
camping
camping
Camping
Camping
camping
camping
camping
camping
Camping
camping
Camping
camping
camping
camping
camping
camping
camping
Camping
camping
camping


camping
Camping
Camping!!!
Camping/Backpacking
Dog Shows
dog sledding
Dog Sledding
enjoy watching bobsledding
Exploring diff. lakes, seeing the beauty, swimming outdoors, sightseeing
exploring the Adirondacks in various ways
exploring the many small, attractive towns and their individuality
fall color photography
figure skating
fine dining
geocaching
golf
golf
golf
golf
golf
golf
golf
golf
Golf
Golf
Golf
golf
Golf
golf
golf
golf
golf
Golf
golf
golf
golf
golf
Golf
golf and ice skating
golf golf golf
golfing
high peaks
historic area, museums

Horse riding
horseback riding
ice hockey
ice hockey
Ice skating
ice skating
ice skating
ice skating
ice skating
ice skating
Ice Skating
ice skating, dog sleds, toboggan chute
Ice Skating, Olympic Rink; Backpacking/Camping
ice skating, tobogganing
Ironman
Ironman
jogging
Lake swimming
Lift to top / Whiteface drive
main st lake placid
mini golf
MOTOCYCLING
Motorcycle Riding
Motorcycle Riding
motorcycle touring
motorcycling
Motorcycling
motorcycling
mountain climbing
Open water swimming, running
photography
photography
photography
Photography
photography
PHOTOGRAPHY
photography
photography of fall foliage
power boating
public swimming - lake everest, lake placid
Relaxing
Relaxing in a chair taking in the views
rugby
rugby

running
running
running
RUNNING, SWIMMING
running/walking
runnung
santas workshop
scuba
shopping
sightseeing
Sightseeing
site seeing
skating
skating
Skating
Skating on the oval
skating,toboggan,dogsled
Skating/ Hockey
Ski Racing
smiling!!!!
snow tubing
snow tubing, bobsled
speed skating, bobsled
Strolling Lake Placid after dinner.
Swimming
Swimming
swimming
swimming
Swimming
swimming
swimming
swimming
swimming
swimming
swimming
Swimming Mirror Lake and Running
swimming, picnicking
swimming, running
swimming/beaches
Swimming/water skiing
triathlon
Triathlon
triathlon
triathlon
Visiting main streets

walking
wcgmc has recommended this area for rock club digs
We did the toboggan in winter
white water rafting
whitewater rafting
wildlife viewing
wine
winter camping

APPENDIX E: SURVEY INSTRUMENT

- 
- 
- 
- 

You received your postcard because,
at some time, you asked for travel information from the Adirondacks.

We're specifically interested in knowing if you vacationed in our area (around Lake Placid, Schroon Lake, Whiteface, and Lake Champlain.) Furthermore, we would like to know some more specific information about your visit to help us evaluate the effectiveness of our tourism marketing program.

If you are at least 18 years of age and complete this survey by Monday, March 21st, 2011, you will be eligible to win a two night stay in Lake Placid, NY at the luxurious [Mirror Lake Inn](#), including breakfast for two each morning, and two [Olympic Passports](#). OR you could win one of five Adirondack chairs from [Old Adirondack](#).

Giving our survey takers a chance to win a vacation is our way of saying "Thank You" for helping us make our region an even better place to visit. Your completed survey will be analyzed by the Technical Assistance Center at SUNY Plattsburgh. This will ensure anonymity, so please be honest with us.

Thank you for your time, good luck, and we hope to see you soon in the Lake Placid/Essex County region!

Please enter your code:

Select * From conversionCodes WHERE theCode = '#form.source#'

You have entered an incorrect code!

Please answer all of the questions in the survey.

There are a total of 19 questions.

Based upon the information you enter, you may not be asked all of them.

1. Please tell us, did you travel to the Lake Placid/Essex County region in 2010?

yes

no

#validationErrorMsg#

2. Are you planning to visit the Lake Placid/Essex County region in the future?

yes

no

#validationErrorMsg#

3. When would you be planning to visit?

1 year

2 years

3 years

more than 3 years

4. How many leisure travel visits did you make to the Lake Placid/Essex County region in 2010?

one

two

three or more

#validationErrorMsg#

5. On your visit in 2010, how many people were in your party for your trip to Lake Placid/Essex County?

Number of Adults

Number of Children

You must use numbers and indicate at least one adult in your party.

[Click here to go back and adjust your entries.](#)

6. Please attempt to recall as accurately as possible your TOTAL expenditures for your party for the following products and services on your recent trip to Lake Placid/Essex County:

(Please enter NUMBERS ONLY, such as 148.56 or 150)

Lodging	\$	<input type="text"/>
Meals	\$	<input type="text"/>
Souvenirs/Shopping	\$	<input type="text"/>
Entertainment	\$	<input type="text"/>
Attractions/Events	\$	<input type="text"/>
Transportation	\$	<input type="text"/>
All Other	\$	<input type="text"/>

You must enter numeric values for your estimated expenses.

[Click here to go back and adjust your entries.](#)

Please enter your best estimate of expenses to continue with the survey.

[Click here to go back and adjust your entries.](#)

7. Please indicate the total length of time you spent in the region in 2010?

Day Trip

5 Nights

1 Night

6 Nights

2 Nights

7 Nights

3 Nights

8 to 13 Nights

4 Nights

14 Nights (or more)

#validationErrorMsg#

8. By which method did you make your reservations for your stay?

Booked reservation on previous trip

Internet

Phoned the hotel chain office

Phoned the lodging office directly

Phoned the Tourism Office

No advance reservations were made

Other

#validationErrorMsg#

9. What type of lodging did you use?

Hotel/Resort

Cottage/Cabin

Motel

Private House Rental

B&B/Inn

Family/Friends

Condo

RV Camper/Tent

#validationErrorMsg#

10. Please tell us when you arrived for your trip to Lake Placid/Essex County:

January/February

March/April

May/June

July/August

September/October

#validationErrorMsg#

Please choose an option.
[Click here to go back.](#)

11. What inspired your interest in the Lake Placid/Essex County region?
Check all that apply.

Been Before

I Love NY Travel Guide

Friend or Family

Internet

Magazine Advertisement

Newspaper

TV Advertisement

Magazine Article

Social Media (Facebook, Twitter, Youtube, etc)

Other influence:

#validationErrorMsg#

12. Which region(s) did you visit, or interested you for the future? Check all that apply.

High Peaks Region (Lake Placid, Keene, Keene Valley)

Whiteface Region (Whiteface Mountain, Wilmington, Jay)

Lake Champlain Region (Champlain Coast, Ticonderoga, Westport)

Schroon Lake Region (Schroon Lake, Newcomb, North Hudson)

Saranac Lake Region (Saranac Lake, Tupper Lake)

Other areas you visited:

#validationErrorMsg#

13. Which of the following activities attracted you to the region?
Check all that apply.

Outdoor Activities (Like: Hiking, Canoe/Kayak, Cycling, Skiing/Riding, Fishing, etc.)

Arts & Entertainment

Heritage & Culture

Olympic Sites

Events

Sightseeing & Touring

Sports

Relaxing, Dining, Shopping

Other activities:

#validationErrorMsg#

14. Which of the Outdoor activities attracted you to the region?

Check all that apply.

Hiking

Cycling

Canoe/Kayak

Guides

Fishing

Boating

Hunting

Rock Climbing

Skiing & Riding

X-Country/Telemark

Snowshoeing

Ice Climbing

Snowmobiling

Other Outdoor Activity:

#validationErrorMsg#

15. How important is ecological/environmental sensitivity of your travel destination or its amenities and facilities to your travel plans or experience?

Extremely important

Important

Neutral

Not important

Not at all important

#validationErrorMsg#

16. Did you find all the information you were looking for in your travel planning for Lake Placid/Essex County?

yes

no

#validationErrorMsg#

17. How would you rate the level of influence of ANY information you viewed, while planning for travel, on your decision to travel to Lake Placid/Essex County?

Helped me decide to take a trip I had not previously planned

Reinforced existing plans to visit the region

Might inspire a trip some other time

Helped me decide not to visit the region

Was not helpful

#validationErrorMsg#

18. What is the annual income of your household?
(Please use whole number, no comma, like : 40000 or 42500)

Annual Gross Income:

\$

You must use numbers to enter gross annual income.
(Used for survey grouping only.)
[Click here to go back and adjust your entries.](#)

19. Important

Please tell us your Zip/Postal Code:

Please tell us your birthyear:

Contest winners will be contacted by email.

Please provide your email address:

#validationErrorMsg#

Thank you for taking our survey.

Your information will be entered for our drawings.

The lucky winners will be notified within 2 weeks of the survey's close.