

LEISURE TRAVEL STUDY

2011 VISITOR PROFILE- RETURN ON INVESTMENT - CONVERSION RATE AND ECONOMIC IMPACT ANALYSIS

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)-
Lake Placid Convention and Visitor's Bureau



PlaceMaking
Growing North Country Communities and Economies
PlaceMaking@gmail.com

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TABLE OF CONTENTS

Executive Summary	2
Methodology	6
Visitor Summary Information.....	8
Respondents' Demographic Profiles and Residences.....	9
Influence to Visit the Region	12
Regional Attractions	14
Sub-Region Visitation	18
Satisfaction With Leisure Travel-Related Information Provided	20
Importance of Ecological/Environmental Sensitivity	21
Visit Duration, Timing and Party Size	22
Lodging Selections	24
Method of Travel Research.....	26
Leisure Visitor Spending	27
Conversion Measurement	29
Return on Marketing Investment and Analysis.....	31
Economic Impact Modeling Results of Visitor Spending.....	33
Summary Key Facts	37
Sources.....	38
<u>APPENDICES</u>	39
A. Visitor Party Respondents by DMA	
B. Tables: Five-Year Data Averages	
C. Full Comparison Data for Social Media Respondents vs. Non-Social Media	
D. Open-Ended Responses	
E. Survey Instrument	

EXECUTIVE SUMMARY

This study was commissioned to ascertain key marketing program statistics and visitor information for the Regional Office of Sustainable Tourism (ROOST) in Essex County, New York. ROOST is responsible for marketing Essex County's tourism assets. The research was targeted exclusively to the leisure travel market and does not reflect impacts produced by the meeting/convention market segments. This is the eighth consecutive year of this research being conducted to measure Essex County tourism. PlaceMaking, a community and economic development research firm, completed the research using consistent methodology to prior years.

The end-product of the research is a carefully estimated return on investment ratio of Essex County public marketing dollars expended during 2011. A presentation of trends for the past five years is included within this analysis where possible, as well as the estimated overall economic impacts of visitor spending.

The number of potential visitors (traceable leads) inquiring about travel to Essex County in 2011 and providing contact information was 104,886. Roughly one-third of these potential visitors were requested to complete a survey, and approximately 1,500 provided a complete response.

Highlights from the report include:

- Average visitor party age of respondents was 49 years old, slightly younger than reported by 2010 visitors.
- The average reported visitor party size for 2011 was 3.8 persons, including an overall average of 3.15 adults and 0.63 children. The adult party size increased slightly from 2010, while the child party size decreased slightly.
- Over half of visitor respondents were from New York State; a higher proportion than in the prior year. Gains in Canadian visitors and lower percentages of visitors from outside the Northeastern U.S. or Canada were found within the research.
- Outdoor activities remained the largest draw to the area, followed by relaxing, dining and shopping, and sightseeing. Outdoor activities have not only remained at the top of the list of attractions for many years, but have steadily grown in popularity as a reported draw to visit.
- More than half of respondents reported interest in the High Peaks, Saranac Lake and Whiteface regions. More than one-third of respondents stated that the Lake Champlain area was of interest.

- The average stay reported by 2011 visitors was 2.8 nights; this is substantially lower than found in 2010. The five year average for duration of stay is 4 nights, a number that has been decreasing somewhat over the last five years.
- As expected, peak summer season held the largest proportion of visitation, followed by early fall/foliage season. Reported winter and early spring visitation fell substantially in 2011 from prior years, likely due to poor weather for winter sports.
- Hotels (31%), Motels (19%), and camping (15%) were the most popular lodging choices noted by survey respondents. The numbers of hotel stays reported were lower among 2011 visitors than measured in the prior years.
- Hiking was the most popular reported outdoor activity, followed by canoeing/kayaking.
- The average reported daily visitor party spending in 2011 was \$453 per day. Estimated daily expenditures decreased from the prior year in the categories of attractions, entertainment, and transportation, but increased in the categories of lodging, meals, and shopping. The result was an overall 5% increase in daily visitor party reported spending from 2011.
- Conversion measurement, 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 85% (compared to 83% among 2010 visitors).
- The estimated number of leisure visitors to the region in 2011 based on contacts through ROOST is 338,782. The estimated number of visitor nights is 948,590. These figures are substantially higher than reported in 2010, but still below the five year average estimate of over 1 million visitor nights.
- For each occupancy tax dollar Essex County spent on marketing, visitors to the County spent an estimated \$89; this is just above the five year average of \$85.

IMPLAN economic modeling software was employed to estimate complete visitor spending impacts to Essex County in 2011. The following results are found through this analysis:

- Two tourism-related industries in Essex County are among its top five employing sectors. Food services and drinking places are estimated to provide 1,116 jobs in Essex County and \$26 million in labor income (household spending) expenditures. This is the 2nd largest employment sector in the county (after government).

- Hotels and motels provide approximately 659 jobs in Essex County and \$25 million in labor income dollars. This is the 5th largest employment sector in the county (after two categories of government, nursing and residential care facilities and food services and drinking places)
- More than 1,300 additional jobs were supported within the county, across all industries, by visitor spending in Essex County in 2011. This is in addition to the already existing tourism-industry jobs.
- More than an estimated \$44 million additional household spending (labor income) in the county was generated by visitor spending in Essex County in 2010. More than \$76 million additional total spending in the county (value added or gross regional product) was provided by visitor spending within the county, based on the 2011 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. While the pool of social media-garnered respondents is much smaller than “all other respondents” (129 vs. 1,270), the results are useful for consideration, particularly when substantial differences are noted between these groups. There are a number of notable variations among this sub-group.

The following notable differences were observed within the social media sub-group:

- Social media respondents represented a slightly lower age demographic than other respondents, with both a mean and median age of forty-four (44) years old.
- Social media respondents were nearly twice as likely as other visitors to report at least three visits during 2011.
- Social media respondents were less likely to report traditional media such as the I Love NY guide, magazine ads, newspaper ads, TV ads or magazine stories as influencing factors for their visits.
- The sub-group of respondents reported higher levels of attraction to Olympic sites, sports, relaxing, and events than non social media generated respondents. This is notable because reported levels of attraction by other respondents fell from prior years in these areas.
- Social media respondents reported nearly double the draw for skiing/snowboarding and snow-shoeing than non social media generated respondents.

- Social media respondents were more likely to report staying in hotels or condominiums for their visits, and less likely to camp or stay in motels than other respondents.
- The sub-group of respondents reported more frequent visitation during the winter and spring months, and less visitation during summer and fall months.
- Social media respondents reported a slightly shorter average duration of stay and a slightly larger average party size than reported by other respondents.
- Social media respondents estimated markedly higher daily visitor spending in every category in comparison to all other respondents. The social media sub-group of visitors reported \$661 spent in Essex County per party per day, versus \$429 spent by all other visitor parties per day. This is likely due much in part to the activities that they engage in while visiting, for instance, it was noted that these visitors are more likely to ski or snowboard while visiting.

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. It appears that the improving economy may have strengthened the visitor market in 2011, allowing some rebound from a difficult year in 2010. Some portions of the reduced funding stream for marketing efforts, such as State matching funds, were restored, allowing the ROOST tourism professionals to better carry out their mission.

The strength of economic impacts of visitor spending provides further information about the value of tourism in the region. It is notable that the impacts of visitor expenditures are estimated to have created nearly as many jobs in the region as currently already exist in the tourism industry. These impacts are substantial.

This 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. The researchers aim to further improve survey response rates in the following year.

METHODOLOGY

Background

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a leisure visitor survey. This is the first year research is completed by this company, however the same methodology is applied as in the previous seven years (conducted by the Technical Assistance Center at SUNY Plattsburgh). The survey instrument was designed collaboratively by PlaceMaking and ROOST to gather information on its leisure visitors and to measure conversion rate of 2011 Essex County the return on investment of marketing expenditures.

The survey was distributed electronically by ROOST to a sampling of roughly one-third of its electronic database of visitors or parties inquiring about visitation to Essex County in 2011. 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 the tourism professionals involved in the research. 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. The survey is attached as Appendix E.

A total of 32,056 invitations to participate in the survey were sent by ROOST. One thousand four hundred ninety nine (1,499) responses were received. Researchers removed those who indicated that they had no travel plans to Lake Placid, for a total of 1,399 complete responses.

The roughly 5% response rate is higher than experienced in the prior year, however lower than the rate experienced in other years. The project team continues to consider a plan for improved survey response in future years. The large overall number of responses (well over 1,000) does also mitigate some concerns about overall response rate.

Survey results were also separated (as was also done for 2010 visitors) by a specific sub-group of respondents, those direct, traceable leads who were generated through social media contact to ROOST (Facebook and Twitter). At the end of each section, a brief analysis is provided if notable differences are found between these social media respondents and all other respondents. Full results of this analysis are found as Appendix C.

The project team for this research is consistent with previous years of study, including project manager Victoria Zinser Duley- Principal with PlaceMaking, John Parmelee- faculty member of the SUNY Plattsburgh Department of Hotel, Restaurant, and Tourism Management 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].

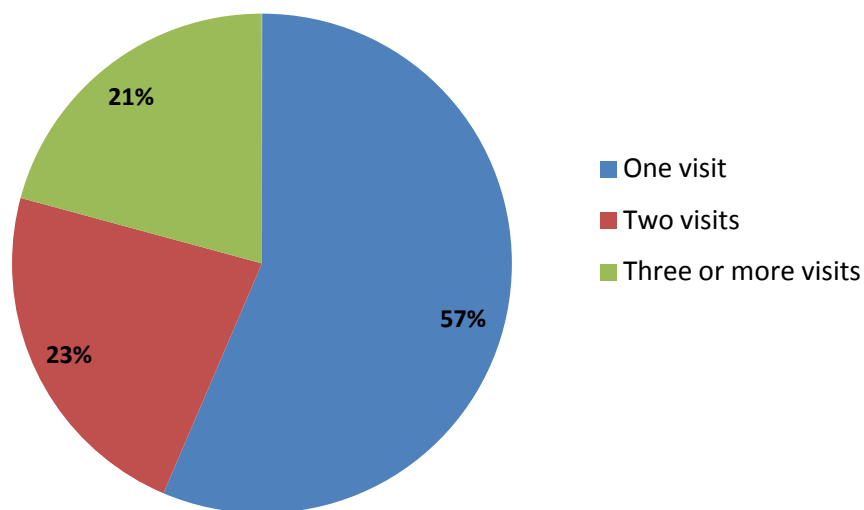
Return on Investment is determined by measuring visitor expenditures divided by the marketing dollars spent.

VISITOR SUMMARY INFORMATION

Seventy-seven percent (77%) of survey respondents who had visited Essex County or had plans to do so reported that they visited the region in 2011. Just under one-quarter of these respondents replied that while they had not visited in 2011, they intended to visit Essex County in the near future.

As displayed in Figure 1 below, 57% of visitors came to Essex County one time in 2011, with the other respondents roughly split between two and three (or more) visits. A higher proportion of visitors in 2011 reported a single visit than respondents to the 2010 survey (57% vs. 53%).

Figure 1. Visits to Essex County in 2011



Social Media Respondents

This sub-group indicated a higher percentage of travel actually carried out within the region in 2011 (87% vs. 77%). Perhaps most notable is the much higher percentage of social media respondents indicating three or more trips in 2011 (41% vs. 18%). It appears that this sub-group may be (twice) more likely than all other visitors to have at least several visits within the year.

RESPONDENTS' DEMOGRAPHIC PROFILE AND RESIDENCES

Income

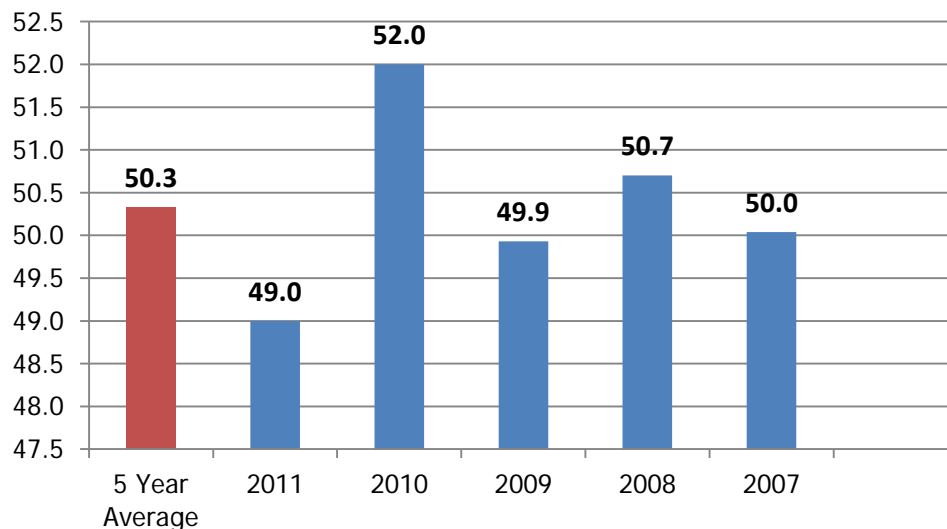
Respondents were requested to select an annual household income range. The range of \$80,000 to \$124,999 represented the mean, median and mode. The mid-point of this range, \$102,500, is used as the representative figure of income for 2011 visitors. This is an inexact figure, but provides a reasonable point of reference. The past five years of data show income within this range, which implies that income level of these visitors is consistent, or perhaps slightly higher, than in prior years.

Age

The mean age of responding visitors in 2011 was forty-nine (49) years old. The median age was fifty (50) years old. This is slightly younger than found in 2010 visitors, but consistent with prior years.

Figure 2 depicts the mean age of the surveyed leisure visitors to the region in 2011.

Figure 2. Age in Years



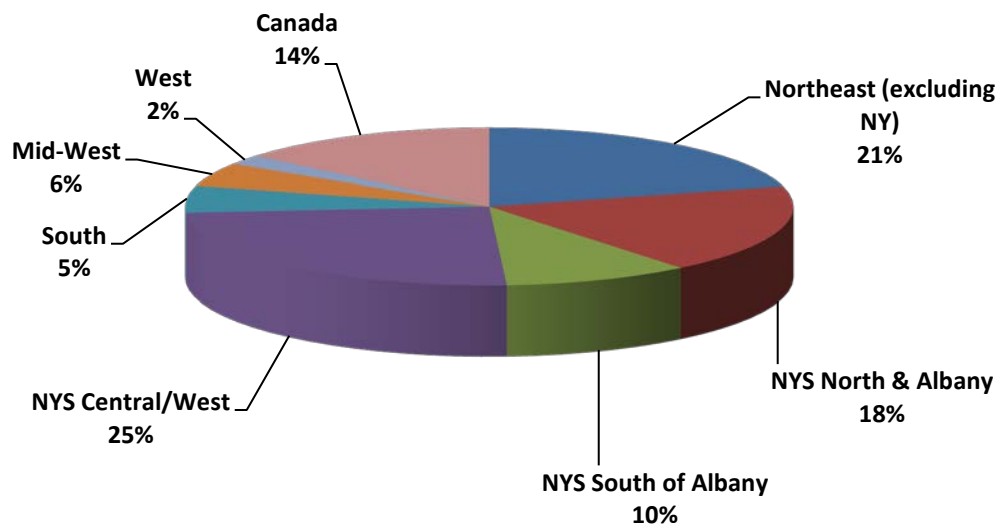
Social Media Respondents

Not surprisingly, social media garnered younger visitors. This group demonstrated a consistent mean and median age of forty-four (44) years old.

Area of Residence

Survey respondents were requested to provide their zip code of residence, with generalized regions of residence provided in Figure 3 below. In this breakout, the “Northeast” includes the Mid-Atlantic and New England states (excepting New York State), 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.

Figure 3. General Area of Visitors' Residence



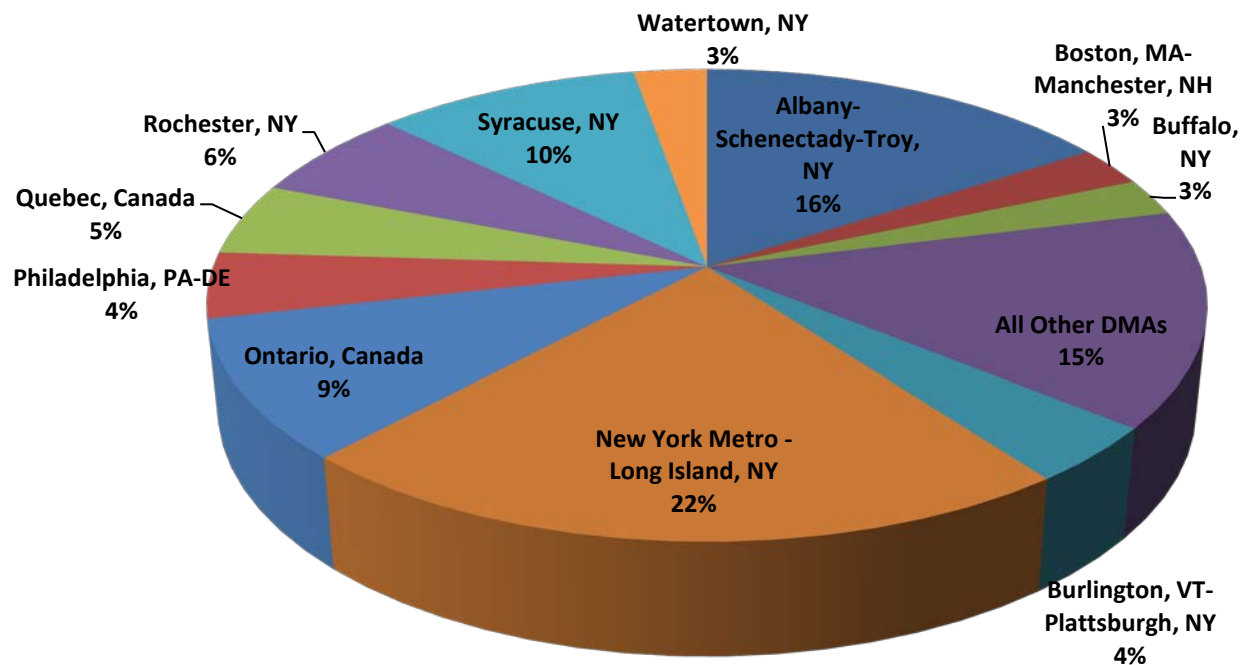
Visitation by these broad regions shows a much larger proportion of visitors who live within a day's drive or less than found in the last several years. Over half of visitor respondents (53%) live within New York State. This compares with 43% of 2010 visitors. A gain in Canadian visitors is also demonstrated, with 14% of respondents hailing from Canada (versus only 10% in 2010).

Substantial decreases in 2011 visitors from other parts of the U.S. were reported. Visitors from outside of New York, the Northeast or Canada comprised 21% of respondents in 2010, but only 13% in 2011. These gains in nearby visitors and losses in longer-distance visitors are consistent with the trend of taking vacations within a day's drive due to the recession.

Figure 4 below provides an analysis of visitor residence by Designated Marketing Area (DMA). Almost one hundred (99) Designated Marketing Areas were represented within the survey. Only those responses with thirty or more responses within the survey are

displayed individually within Figure 4. The complete list of all survey respondent DMAs is found in Appendix A.

Figure 4. Most Frequent DMAs of Survey Respondents



The New York and Long Island metropolitan area dominates the media market representation among survey respondents, with nearly one-quarter of respondents belonging to this region. The other eighty-eight (88) DMAs cumulatively represent fifteen percent (15%) of the media regions represented by visitor respondents.

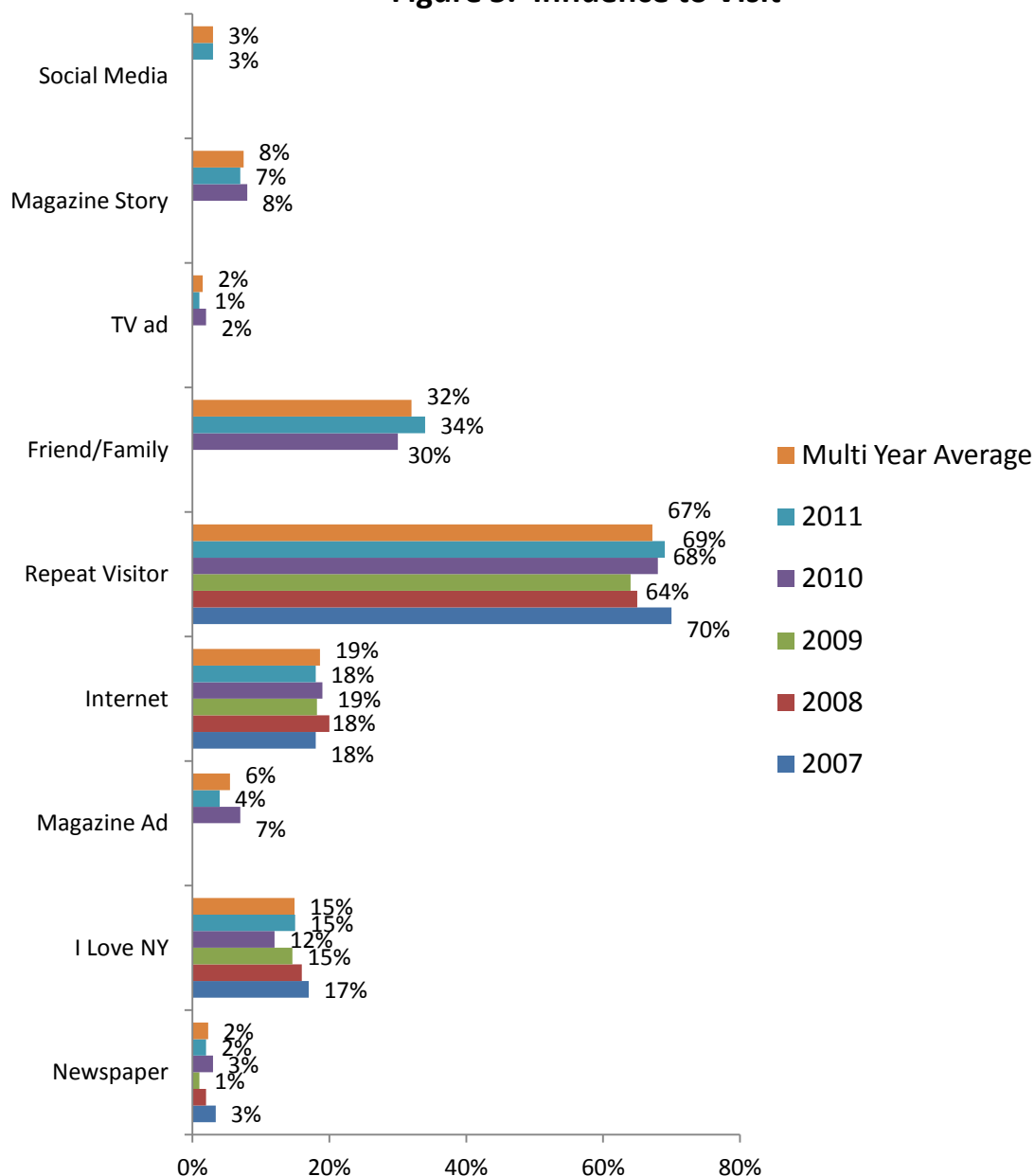
Other substantial media markets among 2011 actual or future visitors included (in descending order):

- Albany-Schenectady-Troy, NY,
- Ontario, Canada,
- Rochester, NY,
- Quebec, Canada,
- Burlington, VT-Plattsburgh, NY and Philadelphia, PA, and
- Watertown, NY, Buffalo, NY and Boston, MA-Manchester, NH.

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. There are several categories for which data are not available for five years, but among those that are available, consistency is noted.

Figure 5. Influence to Visit



Prior visitation continues to be the strongest influencing factor by far, with 69% of respondents in 2011 reporting that a previous visit inspired their return trip. The category of “friend or family” is the second strongest factor of influence, growing in frequency of response by more than one-third of respondents. Internet viewing and the I Love NY campaigns, remain constant as the next most common responses.

Notable drops in the less popular influence categories of TV ads and magazine ads are demonstrated. Reported exposure through the I Love New York program is slightly higher this year.

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

Again this year, social media respondent group were much more likely than all other respondents to report prior visitation (84% vs. 69% by all other respondents) and (not surprisingly) social media as influencing factors for visits. To a lesser extent this sub-group also was more likely to report friends and family in the region as an influencing factor (39% vs. 34% by all other respondents).

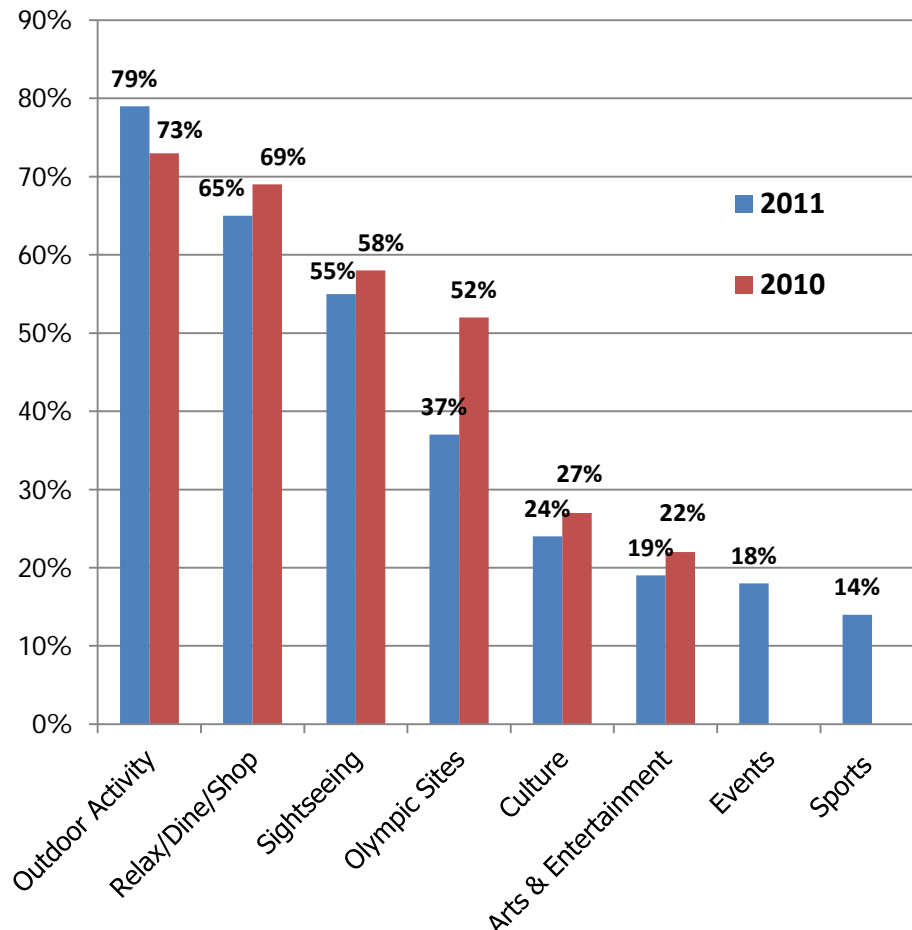
Social media respondents were *less likely* to report traditional media such as the I Love NY guide, magazine ads, newspaper ads, TV ads or magazine stories as influencing factors.

REGIONAL ATTRACTIONS

Overall 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 to the region which were not listed. Multiple responses were permitted. Figure 6 below demonstrates the draw of various attractions for respondents traveling to the region in 2011, in comparison with responses from the prior year. The “events” and “sports” categories were new to the survey in this year.

Figure 6. Attractions to Area



Outdoor activities remain the largest draw to the area. Relaxing, dining and shopping and sightseeing rank as strong secondary draws to the region. It is notable that the top draw- outdoor activities- grew even stronger as reported by 2011 visitors. The

reported draw by Olympic sites fell considerably from 2010. All other responses also fell slightly in popularity from the prior year.

The choices of attraction responses were altered substantially in the 2010 visitor survey, so a full comparison to other years is incomplete. The following table however provides five year averages of these attractions by percentages of responses, for those which were listed as choices during this time.

	5-year Average of Attraction Frequency Response
Outdoor activities	73%
Relax/dine/shop	67%
Sightseeing	57%
Olympic sites	43%
Heritage/culture	26%
Arts/culture	20%

Within the 2011 data, frequent "other" attraction responses included camping, golfing, photography and college-related travel. For a complete list refer to Appendix D (Open Ended Responses).

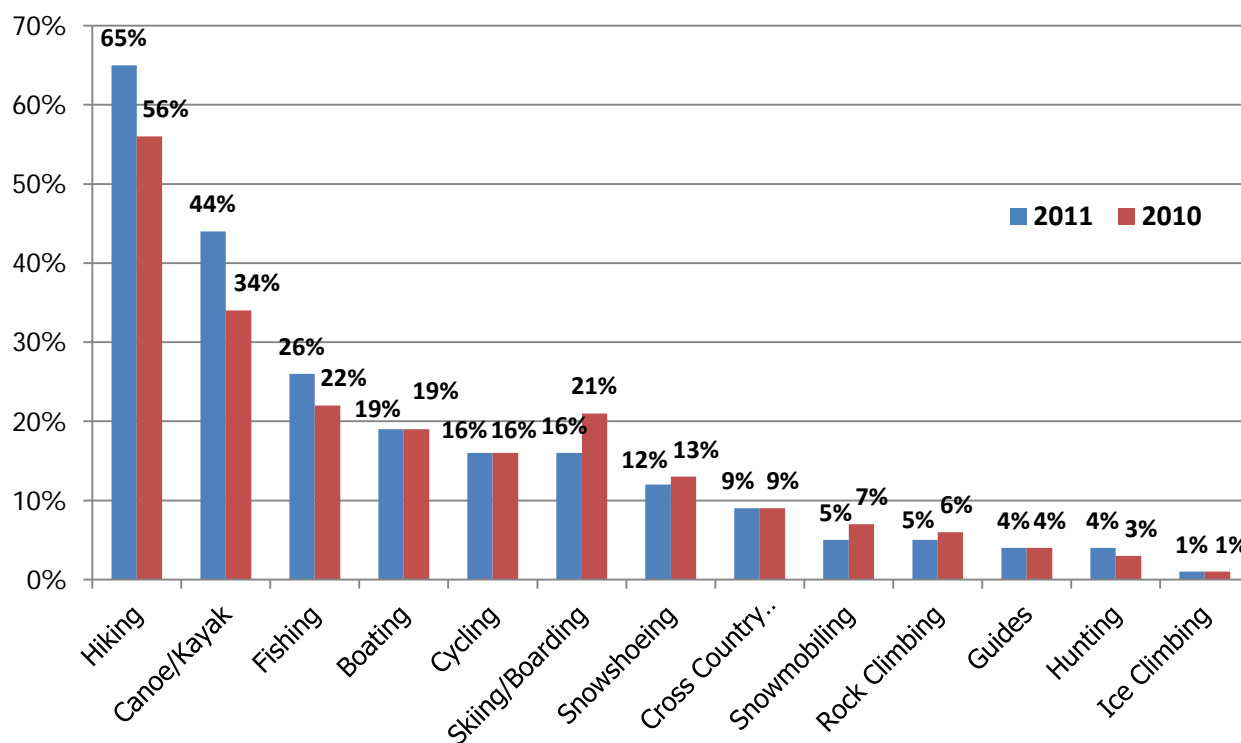
Social Media Respondents

This sub-group of respondents reported substantially higher levels of attraction to Olympic sites (55% vs. 35% all others), sports (26% vs. 18% all others), relaxing (83% vs. 64% all others) and events (26% vs. 18%) than non social media generated respondents. Social media respondents reported a slightly lower draw from outdoor activities and heritage/culture.

Outdoor Activities

Given the consistent popularity of outdoor activities as a draw to the region, a question was added to the survey last year to expand on this topic. For those who had selected “outdoor activities” as an attraction, a follow-up question was included to specify which activities were the strongest draws. These responses are now available for two years. Figure 7 depicts the responses from 2010 and 2011 visitors regarding the attraction of outdoor activities.

Figure 7. Outdoor Activities



Hiking continues to be the most popular reported outdoor activity draw, followed by canoeing/kayaking. Other popular activity draws (with more than ten percent reporting) include fishing, boating, cycling, skiing/snowboarding and snowshoeing. It is notable that respondents this year reported increasing attraction to the top three outdoor activity categories, and flat or decreasing draw among all other categories.

Among those who responded to the “other” category, some of the most common responses include: camping, golfing, running, ice skating and swimming received the most common mentions. See Appendix D (Open Ended Responses) for a complete list.

Social Media Respondents

This sub-group of respondents reported nearly double the draw for skiing/snowboarding and snow-shoeing than non social media generated respondents. Most other outdoor activities did not vary notably.

SUB-REGION VISITATION

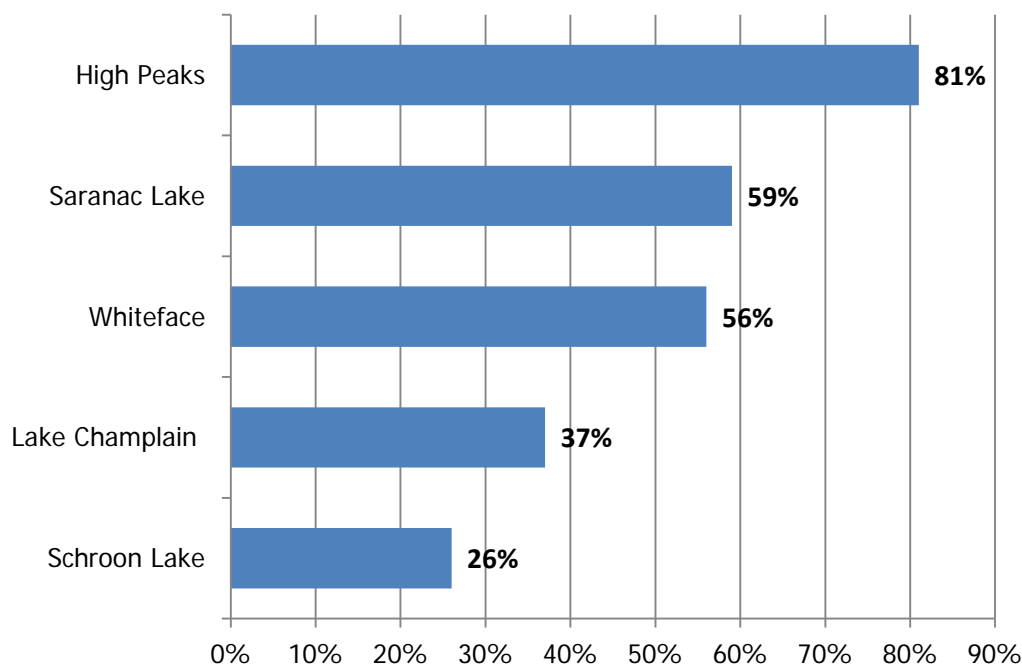
Essex County encompasses a large geographic region of approximately 1,900 square miles. Visitors were asked in the survey which regions within the county they had visited, or were most interested in visiting.

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)

Figure 8 depicts the reported visits or planned future visits within these areas of Essex County by 2011 respondents. Respondents were permitted to select as many areas of interest as they wished.

Figure 8. Sub-Region Visits or Areas of Interest



More than half of respondents reported interest in the High Peaks, Saranac Lake and Whiteface regions. More than one-third of respondents stated that the Lake Champlain area was of interest. Just over one-quarter of respondents reported interested in the

Schroon Lake area. Both Saranac Lake and Whiteface areas gained interest among respondents in comparison to last year's survey.

Social Media Respondents

This group showed a much higher level of interest in the High Peaks region and Whiteface than all other respondents. It appears that this sub-group of visitors may have a stronger preference for mountain-based leisure than other 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-three percent of respondents indicated that they found all of the information they were seeking from the Sustainable Tourism Office, with only 7% indicating dissatisfaction in this area.

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

	5 Year Average	2011	2010	2009	2008	2007
Satisfied with travel information provided	95%	93%	95%	95%	96%	95%

Social Media Respondents

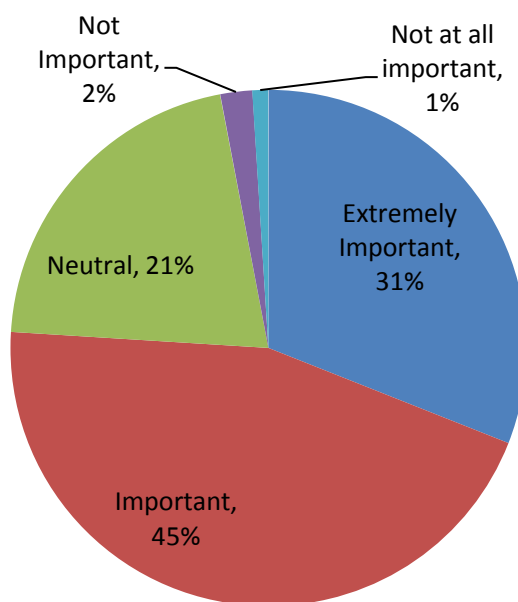
This sub-group reported a slightly higher (96%) level of satisfaction with travel information provided than all other respondents.

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.

**Figure 9. Importance of Ecological/
Environmental Sensitivity**



Just over three-quarters of respondents to this question stated that ecological or environmental sensitivity considerations are “important” or “very important”. With a small minority of visitor respondents indicating that ecological or environmental considerations are not a consideration, this area of focus is validated. It should be noted that there was an anomalously high no-response rate to this question however, which implies that there may have been greater neutrality to this question than shown.

Social Media Respondents

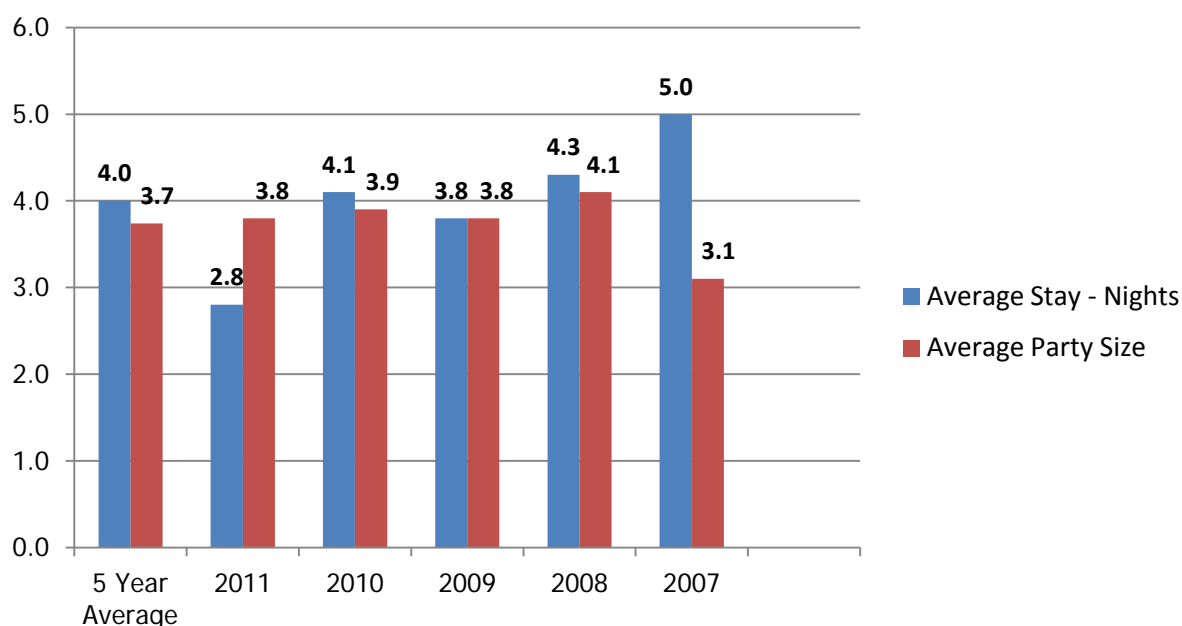
This group indicated that this issue was of slightly higher importance than for all others.

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. Figure 10 provides a summary of these two factors.

Figure 10. Average Stay Duration and Average Party Size



The average reported stay for 2011 visitors was 2.8 nights. A daytrip is considered one zero nights stayed. The mean length of stay decreased substantially this year from the 2010 average. The five year average for duration of stay is four nights, a number that has generally been decreasing over the last five years. This is consistent with a recession economy and overall shorter trips that many visitors are taking as a result.

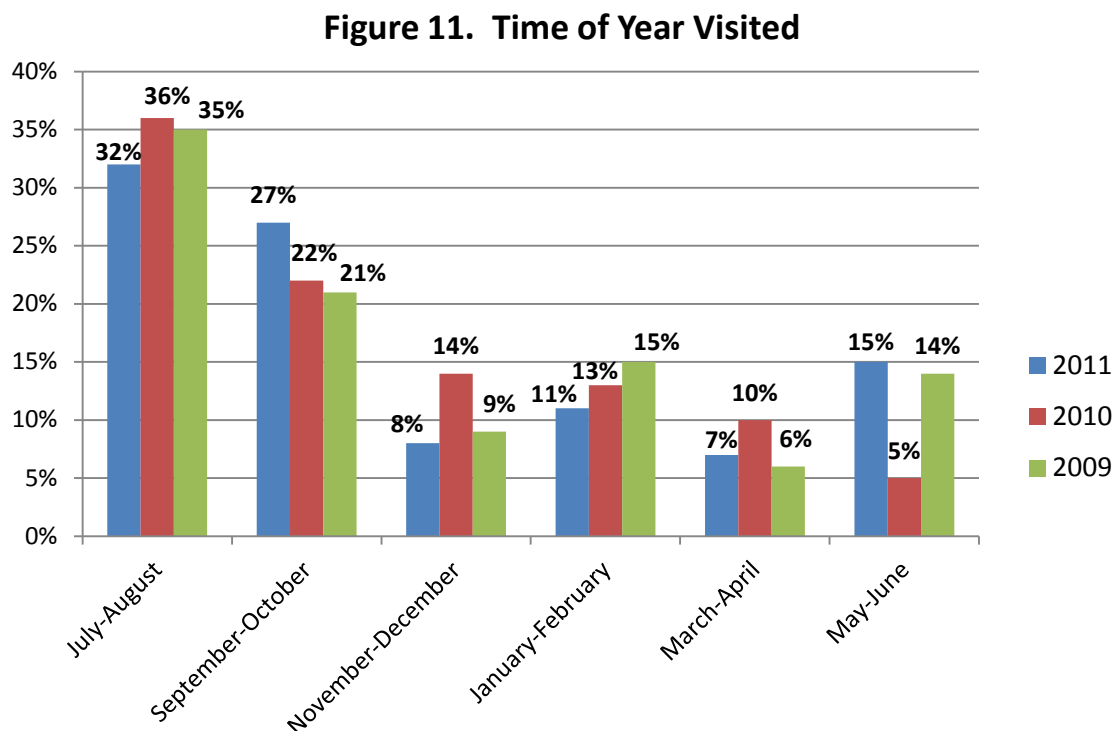
The mean reported visitor party size for 2011 is 3.8 persons, overall very similar to party size reported from 2010 visitors. This includes an average of 3.15 adults and 0.63 children. The adult party size increased slightly from 2010, while the child party size decreased slightly. It will be useful in the future to see if if visitor parties with fewer children are a trend or an anomaly.

Social Media Respondents

The average duration of stay for social media respondents is slightly shorter (2.61 nights) than the duration reported for all other respondents. The average party size and composition for social media respondents is just slightly larger than that for all other respondent (3.87 vs. 3.79).

Season of Visit

Survey respondents were asked about the timing of their visit to the region. Figure 11 depicts this information in comparison to the prior two years.



As expected, peak summer is clearly a large proportion of visitation, followed by early fall/foliage season. Reported winter and early spring visitation fell substantially in 2011 from the prior years. This is likely due to the poor snowfall and warmer winter experienced which was a challenge for winter sports venues. Variation among visitation levels by season is demonstrated across these years.

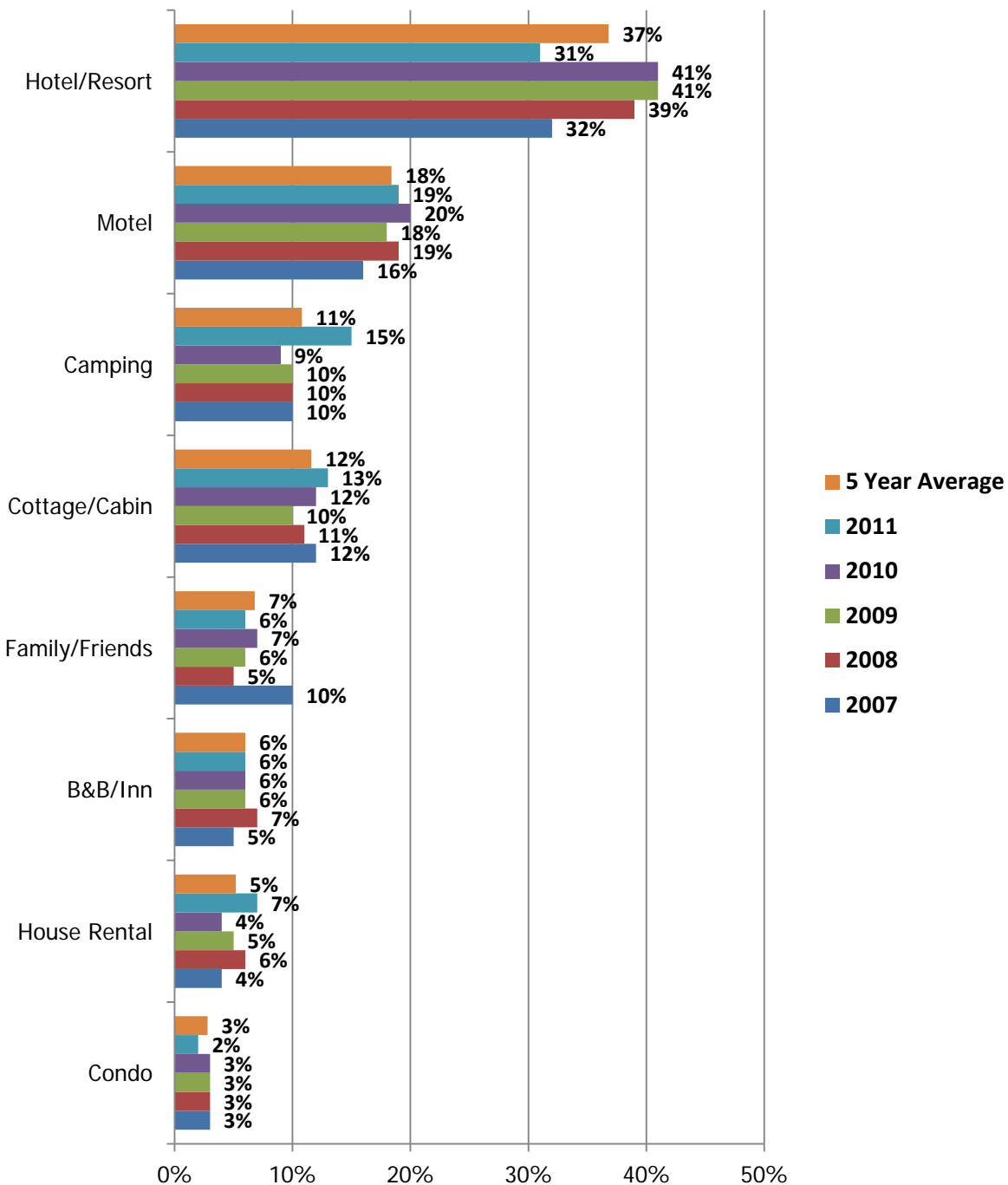
Social Media Respondents

This group reports more frequent visitation during the winter and spring months, and less visitation during summer and fall months in comparison to all other respondents.

LODGING SELECTIONS

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

Figure 12. Lodging Selections



Hotels remain the most popular choice of responding 2011 visitors (31%), although this choice of lodging is lower than in other years. Motels are the next most common choice for accommodation reported by visitors (19%), followed by camping in RVs or tents (15%). This year's survey marks the first time that the camping category was among the top three lodging choices for all visitors.

While a small share, house rentals also rose markedly among 2011 visitors surveyed. Other lodging categories showed little change.

The following table provides the averages of responses for lodging choices from 2007-2011:

	Five-year Average of Lodging Responses
Hotel	37%
Motel	18%
RV/Camping	11%
Cottage/ cabin	12%
Family/ friends	7%
B & B/ inn	6%
Private house rental	5%
Condominium	3%

There have been substantial fluctuations of reported lodging choices across these five years. It will be useful to continue to track these shifts to see if trends emerge.

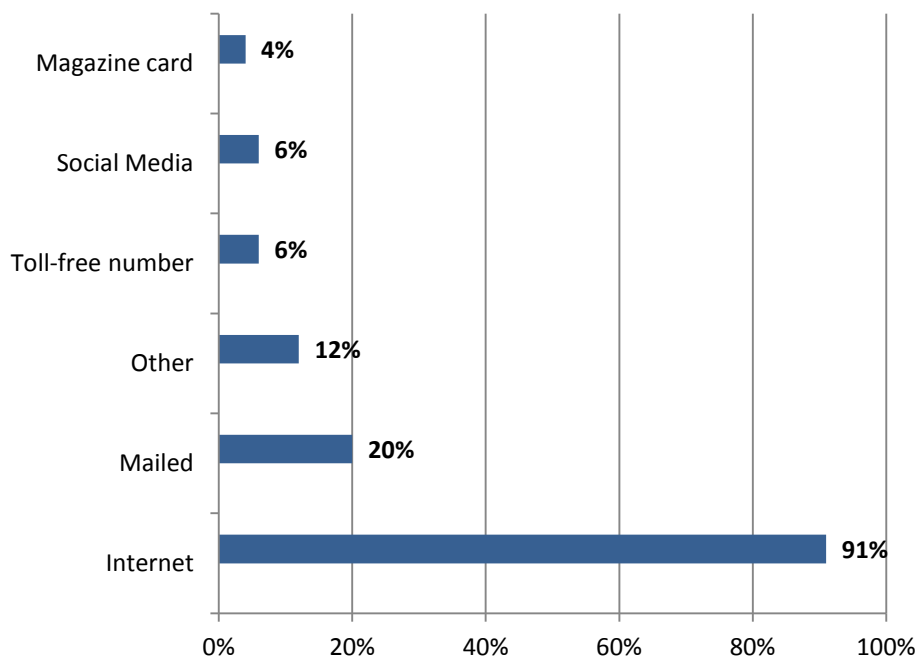
Social Media Respondents

This sub-group of respondents reported being substantially more likely to stay in hotels (almost double the ratio of all other respondents) and more likely to stay in a condominium rental. Social media respondents reported being much less likely to camp or stay in a motel or cabin/cottage than all other respondents.

METHOD OF TRAVEL RESEARCH

As a new question this year, 2011 visitor respondents were asked about the different methods used to make their travel plans. The following chart depicts the results of this inquiry.

Figure 13. Method of Travel Research



Not surprisingly, internet research is carried out by the vast majority of all visitors. Social media captures 6% of this overall audience; it will be useful to track this number in future years.

Social Media Respondents

These respondents were slightly less likely to report using the internet to research travel plans (88% vs. 91% of all other respondents). This is the second year that this has been evident, indicating that this sub-group may use social media (via smart phones or other devices) as an alternative to traditional web research, or that they have less formal planning in their trips.

Social media respondents were also less likely to report using mailed materials, a toll-free phone number or magazine cards.

LEISURE VISITOR SPENDING

Visitor respondents were asked to provide specific estimates of their daily spending in various categories during their 2011 trip to Lake Placid/Essex County. Estimated leisure visitor expenditures *per each visitor party per day* in 2011 decreased in several categories (attractions, entertainment, transportation, other) from 2010, but increased in several key areas (lodging, meals, shopping). The result is an overall *5% increase* in daily visitor party reported spending. It is important to note however that the reported trip length decreased substantially by 2011 visitors in comparison with prior years.

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

Essex County Mean Estimated Visitor Expenditures 2007-2011						
CATEGORY	2011 Mean Expenditure (Per Visitor Party per Day)	2010 Mean Expenditure (Per Visitor Party per Day)	2009 Mean Expenditure (Per Visitor Party per Day)	2008 Mean Expenditure (Per Visitor Party per Day)	2007 Mean Expenditure (Per Visitor Party per Day)	5 Year Average Mean Expenditure (Per Visitor Party per Day)
ATTRACTIONS & EVENTS	\$21.43	\$39.02	\$45.75	\$40.26	\$31.14	\$35.52
ENTERTAINMENT	\$21.07	\$35.23	\$46.31	\$37.43	\$29.00	\$33.81
TRANSPORTATION	\$36.79	\$43.43	\$41.19	\$35.68	\$31.40	\$37.70
LODGING	\$191.07	\$138.93	\$170.91	\$164.16	\$129.20	\$158.85
MEALS	102.86	\$70.24	\$79.72	\$74.16	\$63.20	\$78.04
SOUVENIRS/SHOPPING	55.36	\$48.50	\$53.53	\$49.60	\$39.20	\$49.24
ALL OTHER	\$24.64	\$55.81	\$81.50	\$51.59	\$33.00	\$49.31
AVERAGE DAILY EXPENDITURE	\$453.22	\$431.16	\$518.91	\$452.88	\$356.14	\$442.46

Social Media Respondents

Social media group respondents from 2011 reported markedly higher daily visitor spending in every category. Overall daily expenditures of the social media-garnered subgroup is more than 50% greater than expenditures of all other respondents. This is quite different from what was seen in 2010 where they were comparable levels of expenditures. This information will be important to examine over future years to analyze whether real spending differences are in place, particularly to this extent.

Expenses/Per Party Per Day for 2011	Social Media Respondents	All Other Respondents
Lodging	\$299.23	\$178.80
Meals	\$155.17	\$96.82
Shopping	\$73.18	\$53.00
Entertainment	\$24.90	\$20.49
Attractions/Events	\$29.12	\$20.49
Transportation	\$44.06	\$36.04
Other	\$35.25	\$23.32
Total	\$660.91	428.96

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”.

Figure 14. Influence of Travel Information

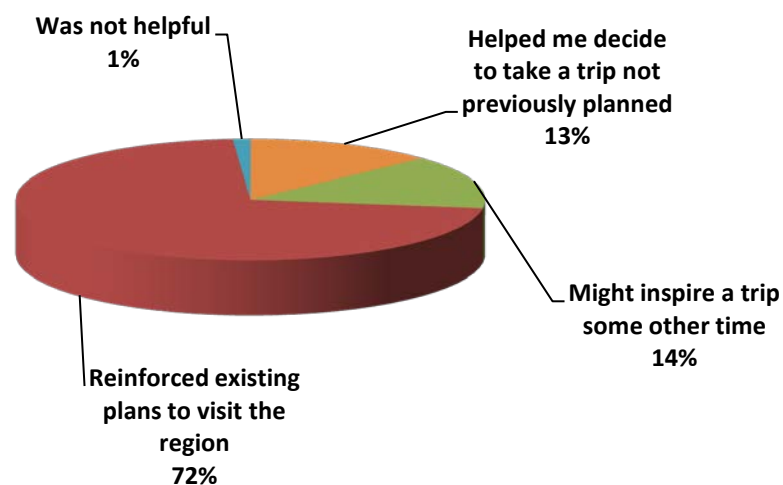


Figure 14 above demonstrates information with regard to inquiry/fulfillment, with a majority of respondents indicating a positive impact of information received. A strong connection of inquiry/purchase results is implied by this information, but cannot be completely validated as would be possible through an on-site intercept survey.

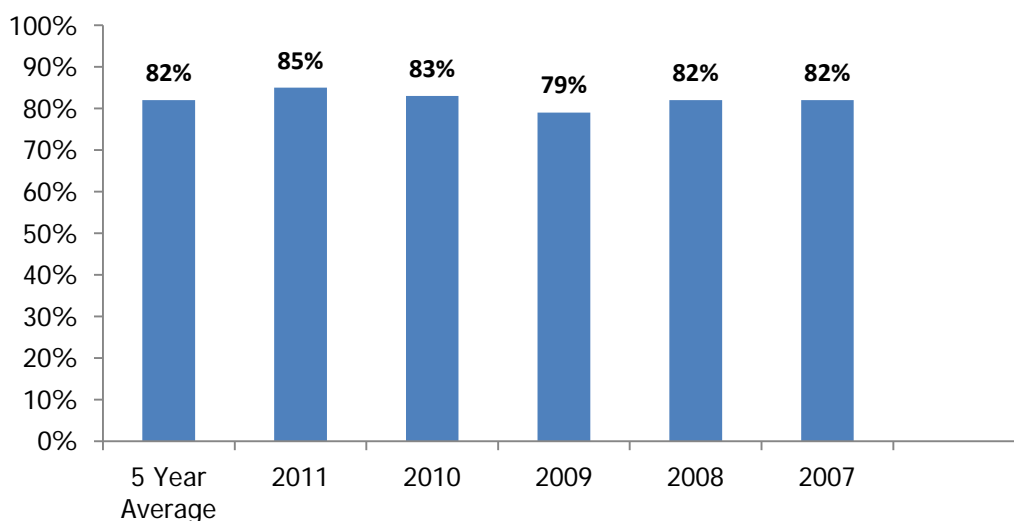
Eighty-five percent (85%) of respondents stated that the information or advertisements viewed either reinforced plans for a trip, or helped convince them to take a trip not yet planned. This is consistent with the *gross conversion rate* of travelers to the area. The gross conversion rate is used for quantitative analysis within the subsequent sections of this report.

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.

This net conversion rate is thirteen percent (13%). Net conversion rates have ranged from 11% to 16% over the last five years. This demonstrates an increase from the 2010 reported net conversion rate of 11%. The net conversion rate can be used as a much more conservative quantitative measure of return.

Figure 15 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 information received from ROOST or from their contact with its offices.

Figure 15. Percent Inspired to Visit Region by Travel Information (Gross Conversion)



The 2011 conversion rate exceeds both the measurement for 2011 and the five year average. This is an extremely positive indication for marketing impacts in this year.

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 2011 estimated visitor count is tabulated by multiplying the number of leads generated by ROOST (those who contacted their office during 2011 for information) by the conversion factor and by the average party size (determined by this survey).

$$104,886 \text{ (direct leads)} \times 85\% \text{ (gross conversion factor)} \times 3.8 \text{ (average party size)}$$

$$338,782 = \text{estimated visitors in 2011}$$

The estimated count of visitors likely influenced by ROOST to visit the region was 338,782 in 2011. This represents more a seventy percent (70%) increase in estimated visitors from 2010 (196,434). This estimation results from a much larger pool of visitor inquiries and a higher reported conversion rate of visitors from 2011.

In 2011, Essex County spent \$1,318,029.9 of occupancy tax dollars for tourism marketing purposes. This yields a \$3.89 marketing cost per visitor based on occupancy tax expenditures (\$1,318,029/338,782). This is much lower than found in previous years, based largely on the higher visitor count and smaller pool of dollars spent.

Multiplying the estimated number of visitors by the 2.8 average night stay provides an estimated *948,590 total visitor nights* stayed in Essex County in 2011. This is substantially higher than last year's figure of 805,379 and very near to the number of nights reported by 2009 visitors (955,423). These figures indicate an improving visitor market in 2011 from the prior year- when the national economic recession was in full effect.

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:

$$104,886 \text{ (number of direct leads)} \times 85\% \text{ (gross conversion factor)} \\ \times \$453 \text{ (mean visitor party expenditure per day)} \times 2.9 \text{ (mean length of stay in nights)}$$

= \$117,120,427 (total estimated revenue generated by visitors in 2011)

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

\$117,120,427 (total estimated visitor revenue) / \$1,318,029 (total marketing dollars spent)

Return on Investment (ROI) = 89:1

The above calculations show that the total estimated revenue generated by visitors was over \$117 million in 2011. This produces an ROI of \$89 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	2011	2010	2009	2008	2007
Five- Year Essex County Occupancy Tax ROI	85:1	89:1	65:1	89:1	86:1	98:1

Return on Investment for visitor spending in Essex County appears to have fully rebounded from figures seen in 2010 when reduced or eliminated marketing expenditures (such as State matching funds) were in place. These figures are positive indicators of an improved market and success in high returns on the marketing dollars spent to reach leisure visitors in 2011.

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 2011 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 2009-2011 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. These figures remain unchanged from last year's report (IMPLAN updates its overall software every three years, but provides regular updates where economic change is noticeable- typically for larger metropolitan areas in-between).

Model Assumptions

A commodity change activity model (based on the tourism data gathered through this research) was used to estimate the effects of 2011 visitor spending in Essex County. Inputs into this model included the following specifications:

- Estimated visitation: 338,782
- Total estimated spending per visitor: \$435
(\$453 spent per visitor party per day x 2.9 average night stay/ 3.8 average visitor party size)
- The spending model attributes total spending in the following proportions: 5% each to attraction/events and to entertainment, 8% to transportation, 42% to lodging, 23% to meals, 11% to shopping and 6% to "other"
- Assumes that nearly all travel to the area is by private vehicle *and* 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 "performing arts" and "spectator sports" sectors
- Adds margins to each retail sector (gasoline stations and retail stores-"other" and "general")
- Event year set to 2011 for consistent dollar valuation

Model Impact Results

The following table displays results of economic impact modeling for visitor spending in Essex County in 2011.

Economic Impacts to Essex County from 2011 Visitor Spending			
	Employment	Labor Income	Value Added/GRP
Direct effects	1,106	\$33,973,747	\$55,061,377
Indirect effects	120	\$5,023,264	\$7,960,888
Induced effects	147	\$5,102,662	\$9,536,371
Total:	1,373	\$44,099,673	\$72,558,636

This means that more than 1,300 estimated 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 over \$44 million additional household spending (labor income) in the county was generated by visitor spending in Essex County. An estimate of over \$72 million additional total spending in the county (value added or GRP) was provided by visitor spending within the county, based on the 2011 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 and either is accurate with an accompanying explanation. It is notable that the estimated number of additional jobs supported by tourism spending in 2011 approaches the actual jobs within the industry. This demonstrates the impact of this spending in the regional economy.

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: 459 additional jobs
- Hotels and motels: 399 additional jobs
- Retail stores (miscellaneous/general): 174 additional jobs
- Other amusement and recreation industries: 73 additional jobs

- Museums, historical sites and parks: 77 additional jobs
- Retail stores (gasoline stations): 50 additional jobs
- Real Estate establishments: 14 additional jobs
- Retail stores (food and beverage): 11 additional jobs
- Advertising: 8 additional jobs
- U.S. Postal Service: 6 additional jobs

It should be noted, again, that the above job numbers represent total employment figures, not full-time equivalents.

These data emphasize the substantial economic boost of the tourism industry and visitor spending to the regional economy, across all sectors. 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 (or for four years where information was not available).

KEY FACTS DERIVED FROM SURVEY DATA

	5 Year Average	2011	2010	2009	2008	2007
Number of Completed Survey Respondents	1,831	1502	1,348	1,526	2,663	2,118
Average Income of Respondents	\$90,902	\$102,500	\$80,000	\$93,211	\$92,213	\$86,585
Mean Age of Respondents	49	49	52	49.9	51.7	50
Direct Inquiries to Essex County via the Bureau	86,087	104,886	60,604	83,753	84,993	96,197
Average Night Stays/ Party	4 Nights	2.8 Nights	4.1 Nights	3.8 Nights	4.3 Nights	5 Nights
Overnight Visitor Stays	1,032,620	948,590	805,379	955,423	1,228,708	1,225,000
Average Party Size	3.75 Persons	3.8 Persons	3.9 Persons	3.8 Persons	4.1 Persons	3.1 Persons
Conversion Factor Rate	82%	85%	83%	79%	82%	82%
Average Daily Expenditure per Party	\$442.27	\$453.22	\$431.16	\$518.91	\$452.87	\$356.00
Total Leisure Visitor Expenditures	\$122,556,434	\$117,120,427	\$89,004,798	\$130,490,357	\$135,757,449	\$140,409,141
Essex County Occupancy Tax and Matching Funds	\$1,541,484*	1,386,583	Not Available	\$1,563,032	\$1,663,976	\$1,552,346
Occupancy Tax and Matching Funds ROI	85:1*	84:1	Not Available	83:1	82:1	90:1
Essex County Occupancy Tax	\$1,431,826	\$1,318,029	\$1,364,634	\$1,465,665	\$1,571,777	\$1,439,023
Essex County Occupancy Tax ROI	85:1	89:1	65:1	89:1	86:1	98:1
Total Bureau Budget	\$1,931,081	\$1,668,742	\$1,941,061	\$1,915,274	\$2,065,427	\$2,064,900
Total Bureau Budget ROI	64:1	70:1	46:1	68:1	66:1	68:1
Total Budget & Regional Co-op	\$2,645,135*	\$2,262,649	Not available	\$2,714,634	\$2,860,642	\$2,742,616
Total Budget & Regional Co-op ROI	50:1*	52:1	Not available	48:1	47:1	51:1
*4 year Average						

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.

APPENDICES

APPENDIX A: DESIGNATED MARKETING AREAS (DMAS) OF ALL SURVEY RESPONDENTS

Designated Marketing Areas:

New York Metro - Long Island, NY	305	Minneapolis St. Paul, MN	4
Albany-Schenectady-Troy, NY	218	United Kingdom	4
Syracuse, NY	138	Wilmington, NC	4
Ontario, Canada	131	Charlottesville, VA	3
Rochester, NY	86	Dayton, OH	3
Quebec, Canada	68	Denver, CO	3
Philadelphia, PA-DE	62	Miami-Ft. Lauderdale, FL	3
Burlington, VT-Plattsburgh, NY	54	Nashville, TN	3
Watertown, NY	38	Orlando-Daytona Beach-Melbourne, FL	3
Boston, MA-Manchester, NH	37	Roanoke-Lynchburg, VA	3
Buffalo, NY	35	South Bend-Elkhart, IN	3
Binghamton, NY	26	St Louis, MO	3
Hartford-New Haven, CT	20	Toledo, OH	3
Washington DC, DC	19	Tucson-Sierra Vista, AZ	3
Wilkes Barre-Scranton, PA	18	Alberta, Canada	2
Utica, NY	15	Augusta, SC	2
Tampa-St. Petersburg-Sarasota, FL	10	Australia	2
Chicago, IL	7	Bangor, ME	2
Cincinnati, OH-KY	7	Davenport-Rock Island-Moline, IL	2
Cleveland-Akron-Canton, OH	7	Germany	2
Baltimore, MD	6	Grand Rapids Kalamazoo Battle Creek, MI	2
Dallas Ft. Worth, TX	6	Greenville-Spartanburg-Ashville-Anderson, NC	2
Elmira, NY	6	Huntsville-Decatur-Florence, AL	2
Harrisburg-Lancaster-Lebanon-York, PA	6	Los Angeles, CA	2
Pittsburgh, PA	6	Madison, WI	2
Springfield-Holyoke, MA	6	Montgomery-Selma, AL	2
Johnstown-Altoona, PA	5	Oklahoma City, OK	2
Providence, RI-New Bedford, MA	5	Raleigh-Durham-Fayetteville, NC	2
Atlanta, GA	4	Richmond-Petersburg, VA	2
Columbus, OH	4		
Detroit, MI	4		
Houston, TX	4		
Indianapolis, IN	4		

San Francisco-Oakland-San Jose, CA	2	Mobile-Pensacola, FL	1
Savannah, SC	2	Myrtle Beach-Florence, SC	1
Terre Haute, IN	2	Norfolk-Portsmouth-Newport News, VA	1
Youngstown, OH	2	Nova Scotia, Canada	1
Bend, OR	1	Nunavut and Northwest Territories, Canada	1
Champaign-Springfield-Decatur, IL	1	Peoria-Bloomington, IL	1
Charlotte, NC	1	Portland-Auburn, ME	1
Chattanooga, TN	1	Portland, OR	1
Erie, PA	1	Reno, NV	1
Flint-Saginaw Bay City, MI	1	Sacramento-Stockton-Modesto, CA	1
Ft. Wayne, IN	1	Salisbury, MD	1
Knoxville, KY	1	Salisbury, DE	1
Lithuania	1	San Antonio, TX	1
Louisville, IN	1	San Diego, CA	1
Louisville, KY	1	Saskatchewan, Canada	1
Marquette, MI	1	Switzerland	1
Memphis, TN	1	Wichita-Hutchinson, KS	1
Mexico	1	Youngstown, PA	1
Milwaukee, WI	1		

APPENDIX B: TABLES- FIVE-YEAR AVERAGES

Demographics	5 Year Average
Mean Income	\$90,902
Mean Age of Respondents	50.3

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

Regional Attractions	5 Year Average
Outdoor activities	73%
Relax/dine/shop	67%
Sightseeing	57%
Olympic Sites	43%
Heritage/culture	26%
Arts/culture	20%

Travel Information	5 Year Average
Satisfied with Information	95%

Visit Information	5 Year Average
Duration	4 Nights
Party Size	3.7 Persons

Lodging Selections	5 Year Average
Hotel	37%
Motel	18%
RV/Camper	11%
Cottage/Cabin	12%
Family/Friends	7%
B & B/Inn	6%
Private House Rental	5%
Condominium	3%

Expenditures	5 Year Average Mean Expenditure Essex County Per Visitor Party per day
Category	
Attractions	\$35.52
Entertainment	\$33.81
Transportation	\$37.70
Lodging	\$158.85
Meals	\$78.04
Souvenirs	\$49.24
All Other	\$49.31
Average Daily Expenditure	\$442.46

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 2011?	(129 people)	(1270 people)
Yes	86%	77%
No, but plan to visit in future	14%	24%
How many in your travel party?		
Adults	3.22	3.13
Children	0.65	0.63
How many nights did you stay?	2.61	2.83
How many leisure trips here in 2011?		
1	40%	59%
2	18%	23%
3 or more	41%	18%
Expenses/Per Day		
Lodging	\$ 299.23	\$ 178.80
Meals	\$ 155.17	\$ 96.82
Shopping	\$ 73.18	\$ 53.00
Entertainment	\$ 24.90	\$ 20.49
Attractions/Events	\$ 29.12	\$ 20.49
Transportation	\$ 44.06	\$ 36.04
Other	\$ 35.25	\$ 23.32
Total	\$ 660.91	\$ 428.96
Method of Travel Research		
Internet	88%	91%
Mailed	7%	21%
Other	14%	12%
Toll free Number	4%	7%
Social Media	25%	4%
Magazine Card	1%	4%

Lodging choices		
Hotel	50%	28%
Motel	12%	20%
Cabin/cottage	12%	14%
RV/tent	6%	17%
Family/friends	4%	6%
House rental	6%	7%
B&B/Inn	5%	6%
Condo	6%	2%
Time of Year Visited		
July-August	24%	33%
September-October	20%	28%
November-December	13%	8%
January-February	18%	10%
March-April	10%	6%
May-June	15%	15%
Why did you visit?		
Been before	84%	68%
I Love NY guide	4%	16%
Friend/family	39%	33%
Internet	18%	18%
Magazine ad	1%	4%
Newspaper ad	1%	2%
TV ad	0%	1%
Magazine story	2%	7%
Social Media	18%	2%
Area of interest		
High Peaks	94%	80%
Whiteface	65%	55%
Lake Champlain	26%	38%
Schroon Lake	13%	27%
Saranac Lake	53%	59%
What attracted you to the area?		

Outdoor activity	74%	80%
Arts & Entertainment	20%	18%
Culture & Heritage	17%	25%
Olympic sites	55%	35%
Events	26%	18%
Sightseeing	52%	55%
Sports	26%	12%
Relaxing	83%	64%
What outdoor activity attracted you to the area?		
Hiking	60%	66%
Cycling	19%	16%
Canoe/Kayak	41%	44%
Guides	4%	4%
Fishing	14%	27%
Boating	16%	20%
Hunting	1%	5%
Rock climbing	5%	5%
Skiing/Boarding	30%	15%
Cross Country Skiing	16%	8%
Snowshoeing	21%	11%
Ice climbing	1%	1%
Snowmobiling	6%	5%
How important was ecological/environmental sensitivity in your travel destination?		
Extremely important	21%	31%
Important	49%	44%
Neutral	28%	20%
Not important	2%	5%
Not at all important	0%	2%
Did you find all the information you were looking for?		
Yes	96%	93%
No	4%	7%

Level of influence of information		
Helped me decide to take a trip I had not previously planned	15%	13%
Reinforced existing plans to visit region	74%	71%
Might inspire a trip at some other time	10%	14%
Helped me decide not to visit region	0%	0%
Was not helpful	1%	1%
Median Age	44	50

APPENDIX D: RESPONSES TO OPEN-ENDED QUESTIONS

"Other" (Unedited) Responses to General Area Attractions

adult figure skating camp	college visit
always the autumn leaves!!	Community Store in Saranac Lake
Beauty of the area	concerts
Beauty of the region	conferences
being with such great people	Dining
bicycling	Donnelly's Ice Cream!
Bird watching	drawing & photography
boating	Dude ranches
boating	fall colors
Boating	family
Boy Scout Camp for my son	family camp
Business conference	Family Event
camping	fishing
camping	Friends moving to lake placid
camping	Getting away
camping	Golf
Camping	Golf
camping	golf
Camping	Golf
camping	golf
Camping	golfing
camping	grreat camping
camping	half marathon
Camping	hockey
Camping	Horseback riding
Camping	Hunting
camping	hunting
camping	I heard there are Moose there
camping	Ice Skating on Oval/lake
camping	ironman
Camping	Ironman Lake Placid
camping	just living the ADK experience
camping	Kayak, hike
child fun	lake george and area history
Church	lake placid car show
college student there	Lake Swimming

love the lakes
mini golf, disc golf
Motorcycle Touring
motorcycling
mountain biking, and bar hopping
Newly opened Museumn
No TV No phones!!
on the way to visiting Potsdam NY
painting
peace and quiet
peaks, fall foliage
Photo Ops
Photography
photography
Photography
photography
Photography
Photography
photography
Plein air painting
plein air painting
QUIET
relaxing

Riding the wonderful ferries on Lake Champlain.
santa's workshop
scenery
Schroon Lake Beach
ScSchroon Lake Town Beach
shopping
snow machine
Snowmobiling
Something amazing about it.
son will be attending Clarkson
spending time with family
Stepson interested in going to Paul Smiths college
swim
swimming, camping
The WILD Center
Triathlon training
visit Brian Ford (old friend)
walking around Mirror Lake
water ramps at olympic park
Wedding on top of Whiteface
wild center
WOL

"Other" (Unedited) Responses to Outdoor Activities Attractions

Backpacking/hiking	camping
Bird watching	camping
Bird Watching	Camping
Bird watching	camping
blue mt.museum	camping
bobsled	camping
bobsled experience	camping
bobsled/luge,ski jump compition	camping swimming
Camping	Camping/Olympic Village
CAMPING	camping/picnic
camping	'dark sky' astronomy
camping	Dog sleds and swimming in lake
camping	driving through the area
camping	Enjoying nature
camping	fall foliage
camping	figure skating
camping	Figure Skating
Camping	Garage Sale-ing
Camping	golf
camping	golf
camping	Golf
camping	golf
camping	Golf
Camping	golf
Camping	golf
Camping	Golf
Camping	golf
camping	golf
Camping	Golf
Camping	golf
camping	golf
Camping	Golf
Camping	golf
Camping	GOLF
Camping	golf
Camping	Golf
camping	golf
camping	golf

golf
golf
Golfing
golfing
high peaks,camping
history
HORSE BACK RIDING
Horse riding
horse riding
Ice fishing
Ice Skating
Ice Skating
ice skating
Ice Skating
Ice Skating
Ironman
Lacrosse
luge, toboggan
mini golf, disc golf
motorcycle riding
Motorcycle Touring
motorcycling
motorcycling
Mt. Climbing
Olympic Experience (Bobsled/Luge Training
experience)
Olympic Experience (Bobsled/Luge Training
experience)
Photographing/painting and sketching
photography
photography
Photography
Photography
Photography
Place where we could bring our dog.
rafting
Rafting
Rafting
relaxing and camping
riding motorcycle and can-am rugby starting
back in 1978

running
running
Running
Running
Running Events
running- LP marathon
running swimming
Running, swimming
rving
scuba diving
sculling / rowing
shooting
shopping
shopping, views
sightseeing
sightseeing
site seeing and touring
skating
son trains at olympic park
speedskating at the oval
Stroller walk around Mirror Lake!
swimming
swimming
swimming
swimming
swimming
swimming and running
swimming, camping
swimming, golf
swimming; running
the beach
tradition
Triathlon
walking
water skiing SL
Well, not this year on the snow shoeing and
x-country
White Water Rafting
youth hockey tournament
zip lining
ziplining

APPENDIX E: SURVEY INSTRUMENT



*You received this invitation
because, at some time, you asked
for travel information from the
Adirondacks.*



Tell us what you think about 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.

And you'll be entered to win!

If you are at least 18 years of age, and complete this survey by **Friday, April 20th, 2012**, you will be eligible to win:



Two night stay at [Mirror Lake Inn](#), Lake Placid's only four diamond resort on the lake shore, including breakfast for two each morning, and dinner for two one night. The Grand Prize also includes an Olympic Passport for two so you can visit all the [Olympic Venues](#).



OR

One of five Adirondack chairs from [Ray Brook Frog](#), the coziest, most comprehensive supplier of rustic furniture and accessories within the Adirondack Mountain region.



(See [rules](#) for complete details.)

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!

**Click *here* to
complete the
survey**

Lake Champlain

REGION



WHITEFACE REGION... **GET CLOSE**

Schroon Lake, NY

Your Adirondack Base Camp: *Easy to get to, close to everything*



Tell us what you think about the Adirondacks

You were interested



Please answer all of the questions in the survey.

There are a total of 22 questions.

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

[Begin](#)



Begin

1. Please tell us, did you travel in 2011?

☐ yes

☐ no

Continue

2. How many leisure travel visits did you make to the Lake Placid/Essex County region in 2011?

☐ none

☐ one

☐ two

☐ three or more

Continue

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

☐ yes

☐ no

Continue

4. When would you be planning to visit?

☐ 1 year

☐ 2 years

☐ 3 years

☐ more than 3 years

Continue

5. 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

☐ Website

☐ Magazine Advertisement

☐ Newspaper

☐ TV Advertisement

☐ Magazine Article

☐ Facebook or other social media

☐ Other influence:

Continue

6. 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:

C o n t i n u e

7. 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
- ☐ Events
- ☐ Heritage & Culture
- ☐ Sightseeing & Touring
- ☐ Olympic Sites
- ☐ Sports
- ☐ Relaxing, Dining, Shopping
- ☐ Other activities:

C o n t i n u e

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

Check all that apply.

- ☐ Hiking
- ☐ Rock Climbing
- ☐ Cycling
- ☐ Skiing & Riding
- ☐ Canoe/Kayak
- ☐ X-Country/Telemark
- ☐ Guides
- ☐ Snowshoeing
- ☐ Fishing
- ☐ Ice Climbing
- ☐ Boating
- ☐ Snowmobiling
- ☐ Hunting
- ☐ Other Outdoor Activity:

C o n t i n u e

9. Please tell us how you researched your travel plans?

Check all that apply.

- ☐ Toll free phone number
- ☐ Internet
- ☐ Social media such as Facebook or Twitter
- ☐ Mailed a request for information
- ☐ Magazine request card
- ☐ Other:

Continue

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

- ☐ yes ☐ no

Continue

11. 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

Continue

12. Had you visited the Lake Placid/Essex County region before?

- ☐ yes ☐ no

Continue

13. 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

C o n t i n u e

14. On your visit in 2011, how many people were in your party for your trip to Lake Placid/Essex County?

Number of Adults

0

Number of Children

0

15. Please tell us when you arrived for your trip to Lake Placid/Essex County: Check all that apply.

- ☐ January/February
- ☐ March/April
- ☐ May/June
- ☐ July/August
- ☐ September/October
- ☐ November/December

C o n t i n u e

16. Please indicate the total length of time you spent in the region in 2011?

- ☐ Day Trip
- ☐ 1 Night
- ☐ 2 Nights
- ☐ 3 Nights
- ☐ 4 Nights
- ☐ 5 Nights
- ☐ 6 Nights
- ☐ 7 Nights
- ☐ 8 to 13 Nights
- ☐ 14 Nights (or more)

C o n t i n u e

17. What type of lodging did you use?
Check all that apply.

☐ Hotel/Resort

☐ Cottage/Cabin

☐ Motel

☐ Private House Rental

☐ B&B/Inn

☐ Family/Friends

☐ Condo

☐ RV Camper/Tent

C o n t i n u e

18. 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, WITHOUT any \$ sign. If you had no expenses for a category, please enter 0.)

Lodging

\$

Meals

\$

Souvenirs/Shopping

\$

Entertainment

\$

Attractions/Events

\$

Transportation

\$

All Other

\$

C o n t i n u e

19. What is the annual income of your household?

☐ Less than \$30,000

☐ \$80,000 to \$124,999

☐ \$30,000 to \$59,999

☐ \$125,000 to \$200,000

☐ \$60,000 to \$79,999

☐ over \$200,000

C o n t i n u e

20. Please tell us your Zip/Postal Code:

C o n t i n u e

21. Please tell us your
birthyear:

Select:

C o n t i n u e

22. Contest winners will be contacted by email.

Please provide your email
address:

F i n i s h e d

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.