

LEISURE TRAVEL STUDY

2012 VISITOR PROFILE AND RETURN ON INVESTMENT - CONVERSION RATE ANALYSIS

Essex County, New York

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



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EXECUTIVE SUMMARY

Introduction

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 ninth consecutive year of this research being conducted to measure Essex County tourism. ROOST contracted with PlaceMaking, a community and economic development research firm, to complete this research using methodology consistent to prior years.

PlaceMaking conducted a comprehensive survey of 2012 visitors to Essex County. The end-product of the research includes detailed visitor information and a carefully estimated return on investment ratio of Essex County public marketing dollars expended during 2012. A presentation of trends for the past five years is included within this analysis where possible.

The number of potential visitors (traceable leads) inquiring about travel to Essex County in 2012 and providing contact information, was 101,998. Roughly one-third of these potential visitors were requested to complete a survey, and over 4,000 responded. This is an increase in response of more than 1,600 visitors.

Survey Respondent Data Summary

Highlights of 2012 visitation to Essex County from among all survey respondents included:

- Average visitor party age of respondents was 51 years old; this is consistent with data on average from the last five years.
- The average reported total visitor party size was 4.0 persons, including an average of 3.22 adults and 0.73 children. This was a slight growth from average reported 2011 visitor party size (3.8 persons).
- Visitation by area of residence shows for the second year a larger proportion of visitors who live within a day's drive or less than found in years prior. One half (50%) of visitor respondents reported living in New York State, which was slightly lower than demonstrated from 2011 (53%). Visitation from all other regions was consistent from the prior year.
- Outdoor activities remained, by a substantial margin, the largest draw to the area. Relaxing, dining and shopping, followed by sightseeing, were secondary

frequently reported draws to visit the region. Sports, events and Olympic sites all demonstrated an increase draw of visitor interest in comparison to the prior year. Overall, visitors reported an increased interest in “active” pastimes during their 2012 stay.

- Hiking was the most popular reported outdoor activity among all survey respondents. It was followed (in descending order) by the other frequently selected categories of interest: canoeing/kayaking, fishing, skiing/boarding and boating.
- More than half of respondents reported a specific interest in the High Peaks, Saranac Lake and Whiteface sub-regions. More than one-third of respondents stated that the Lake Champlain area was of interest during their visit to Essex County.
- The average stay reported by 2012 visitors was 4.9 nights. This represents a substantial increase from the 2011 average reported visit duration of 2.8 nights. This figure is also higher than the five year average of 4.0 nights.
- Peak summer remained the most commonly reported time for visitation, however the proportion of visits during this season (July and August) have fallen over the last three years. Foliage season (September and October) remained the second most commonly reported visited season, however its reported popularity also fell from the prior year. Gains in mid-winter visitation were reported among 2012 visitors.
- Hotels remained the most popular 2012 lodging choice as noted by survey respondents. Reported stays in motels dropped slightly and remained the second most common choice by a very narrow margin. A steady increase of popularity of cabin or cottage rentals and camping has been reported over the last several years.
- The average daily visitor party spending in 2012 was estimated at \$326 per day. This is substantially lower than the average daily spending reported over recent years, however given the increase in trip duration, overall estimated spending per trip (per visitor party) increased to \$1,597.
- 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 82%. This is consistent with the five-year average of conversation rate.
- The estimated number of leisure visitors to the region in 2012 based on contacts through ROOST is 342,458, representing a small increase from the prior year.

The estimated number of visitor nights is 1,678,044 however, which represents a record high figure from the nine year history of this survey.

- For each occupancy tax dollar Essex County spent on marketing, visitors to the County spent an estimated \$82. This is equivalent to the five-year average Return on Investment.

Social Media Respondent Summary

Survey responses by those who participated through ROOST social media outlets (Facebook and Twitter) were separated for individual consideration, versus the remainder of the group. The pool of social media-garnered respondents is much smaller than “all other” respondents (374 vs. 3,663), but grew in size over the last year in proportion to increased general response.

The following differences were noted among the social media sub-group responses, in comparison with “all other” survey responses:

- Social media respondents comprised a younger age group (46 vs. 51 years on average).
- Social media respondents were less likely to have visited the region previously (74% vs. 81%).
- Social media respondents were much more likely, not surprisingly, to report using social media outlets to research and make travel plans, and less likely to use the ROOST toll free number or mailed information.
- Social media respondents were much more likely to report friends or family, or social media, as influencing their decision to visit in 2012.
- These respondents reported higher levels of attraction to outdoor activities and arts and entertainment than “all other” respondents. Among those for whom outdoor activities were a draw, hiking and canoeing/kayaking were reported with substantially higher frequency than among the other respondents.
- Social media respondents were more likely to report camping or staying with family or friends during their 2012 visit.
- Social media respondents reported a slightly longer average duration of stay and a slightly smaller average party size than other respondents.

- Social media respondents estimated a nearly equivalent daily visitor spending in comparison to “all others” (\$325 vs. \$326). Overall spending, however, was just slightly higher among this sub-group given the slightly longer average stay.

Variations noted among these sub-groups have shown few consistencies over the last several years, with the exception of a younger age demographic and their increased use of social media.

Conclusion

The full year of an improved economy clearly strengthened the region's visitor market in 2012, allowing rebound from a partial recovery seen in 2011 and from a fully down year in 2010. The continued restoration of funding for marketing efforts such as state matching funds allowed ROOST tourism professionals to better carry out their mission. The record number of survey responses and greatly improved survey response rate were successful efforts by ROOST to improve the diminishing response which had occurred over the last several years of its employment.

This study may be used to enhance and evaluate future marketing efforts, techniques, and marketing channels. The data generated by this research remain consistent over the past five or more years in many areas, strengthening the credibility of findings and highlighting areas where emerging trends (such as social media) are apparent. It will be interesting to continue to track the areas where different trends are emerging (including for instance, preferred accommodation types and the according impacts).

The Visitor Study again demonstrated the highly positive results of Essex County and ROOST's tourism marketing campaign and the economic benefits to Essex County for tourism marketing dollars expended. The expected growth of the U.S. tourism industry in general (as forecasted by the U.S. Department of Commerce) provides a bright outlook for these impacts to the region as a whole into the near future.

METHODOLOGY

Background

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a leisure visitor survey for the second consecutive year. The study employed the same methodology as in the prior seven years (when it was 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 the return on investment of Essex County 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 2012. 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 34,029 invitations to participate in the survey were sent by ROOST. Four thousand thirty-five (4,037) responses were received. Researchers removed those who indicated that they had not visited and had no travel plans to Lake Placid, for a total of 3,902 complete responses.

The 11.8% rate of response provides strong confidence in data validity. It is substantially higher than occurred in the last several years. This is attributed to ROOST efforts to screen recent contact information for accuracy.

Survey results were also separated by a specific sub-group of respondents, the 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 University¹:

“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.

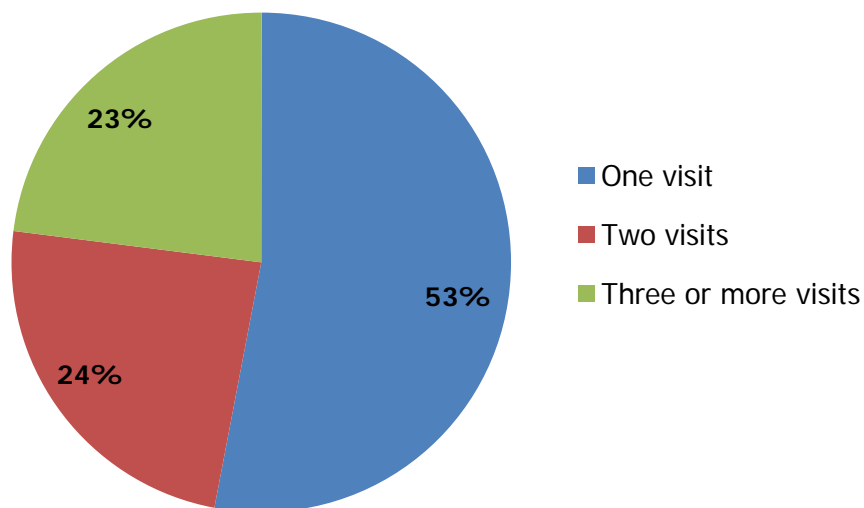
VISITOR SUMMARY INFORMATION

According to the International Trade Administration within the U.S. Department of Commerce, U.S. travel is forecasted to grow roughly 4% annually over the next five years². The reduced travel seen over the last several years appears to have been replaced by expected slow, steady growth.

Sixty-one percent (61%) of survey respondents who had visited Essex County or had plans to do so, reported that they visited the region in 2012. Thirty-nine percent (39%) of these respondents replied that while they had not visited in 2012, they intended to visit Essex County in the near future.

As displayed in Figure 1 below, 53% of visitors came to Essex County one time in 2012, with the other respondents roughly split between two and three (or more) visits. The nearly equal split of visitor respondents who made only one and multiple visits to Essex County within the year exhibits the strength of the repeat visitor market within the region.

Figure 1. Visits to Essex County in 2012



Social Media Respondents

This sub-group indicated a notably higher percentage of travel to the region actually carried out (74% vs. 61%). In addition, the social media respondents were slightly more likely (comprising 25% vs. 23% of the total group) to have made three or more visits to the region in 2012. This sub-group of visitors may be more avid travelers, either in general, or at least to Essex County.

RESPONDENTS' DEMOGRAPHIC PROFILE AND RESIDENCES

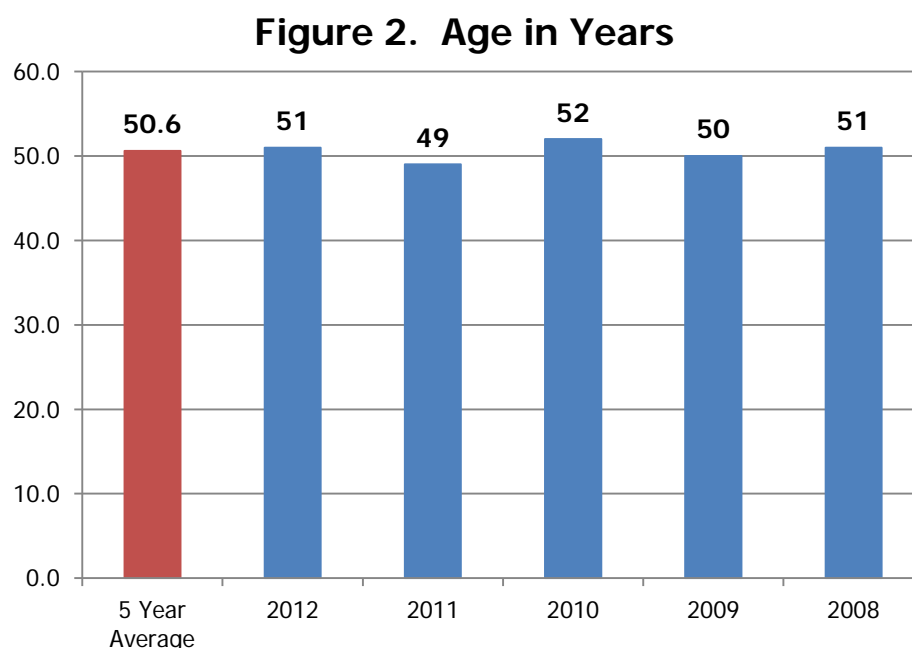
Income

Respondents were requested to select an annual household income range. Mean annual household income of visitor respondents is estimated at \$98,456. This is roughly consistent with a comparison of other years of visitor income levels. The estimated median annual household income is \$100,000, providing a close comparative figure and validating the mean estimate.

Age

The mean age of responding visitors in 2011 was fifty-one (51) years old. The median age was fifty-two (52) years old. These ages are roughly consistent across years of research.

Figure 2 depicts the mean age of surveyed leisure visitors to the region in 2012.



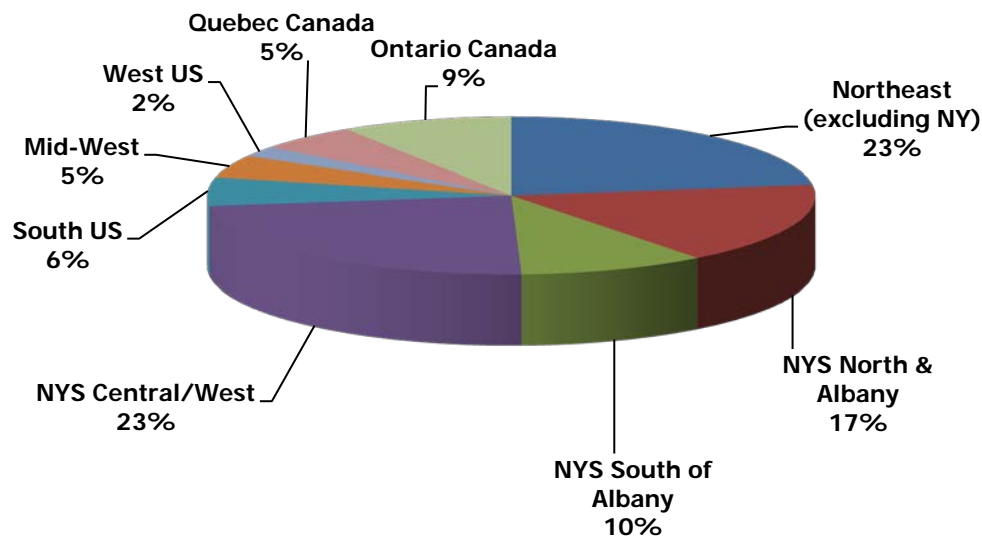
Social Media Respondents

There was no measurable difference in income levels for the social media subgroup of respondents. This group however, as in prior years, demonstrated a substantially younger response, with a mean of forty-five (45) years old and a median of forty-six (46) years old. The consistencies between these measures of age help validate these data.

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



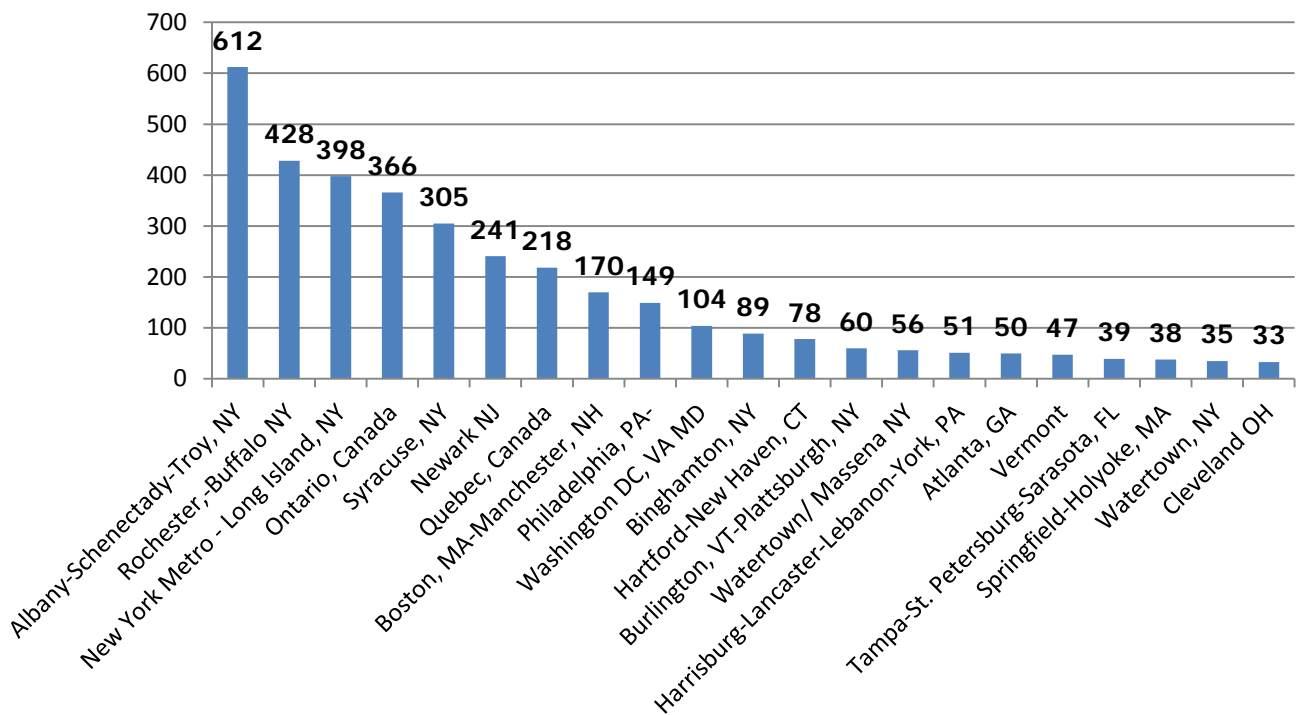
Visitation by these broad regions shows for the second year a larger proportion of visitors who live within a day's drive or less than found in years prior. It appears that the effects of the recession of visitors staying closer for their vacations, within driving distance, are longer-term even as the economy improves.

One half (50%) of visitor respondents reported coming from New York State. This is slightly reduced from the year prior (53%). The difference is attributed to a slight decrease in reported visitors from Central or Western New York State.

Reported visitation from all other regions was consistent with the year prior, including: Canadian, downstate New York, Capital District New York and north, and regions of the U.S. outside of the northeast (west/mid-west and south) visitation.

Figure 4 below provides an analysis of visitor residence by Designated Marketing Area (DMA). Seventy (70) Designated Marketing Areas were represented within the survey. This provides a more consolidated representation than found among 2011 visitors, when nearly one-hundred areas were represented. 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. Major DMAs of Survey Respondents

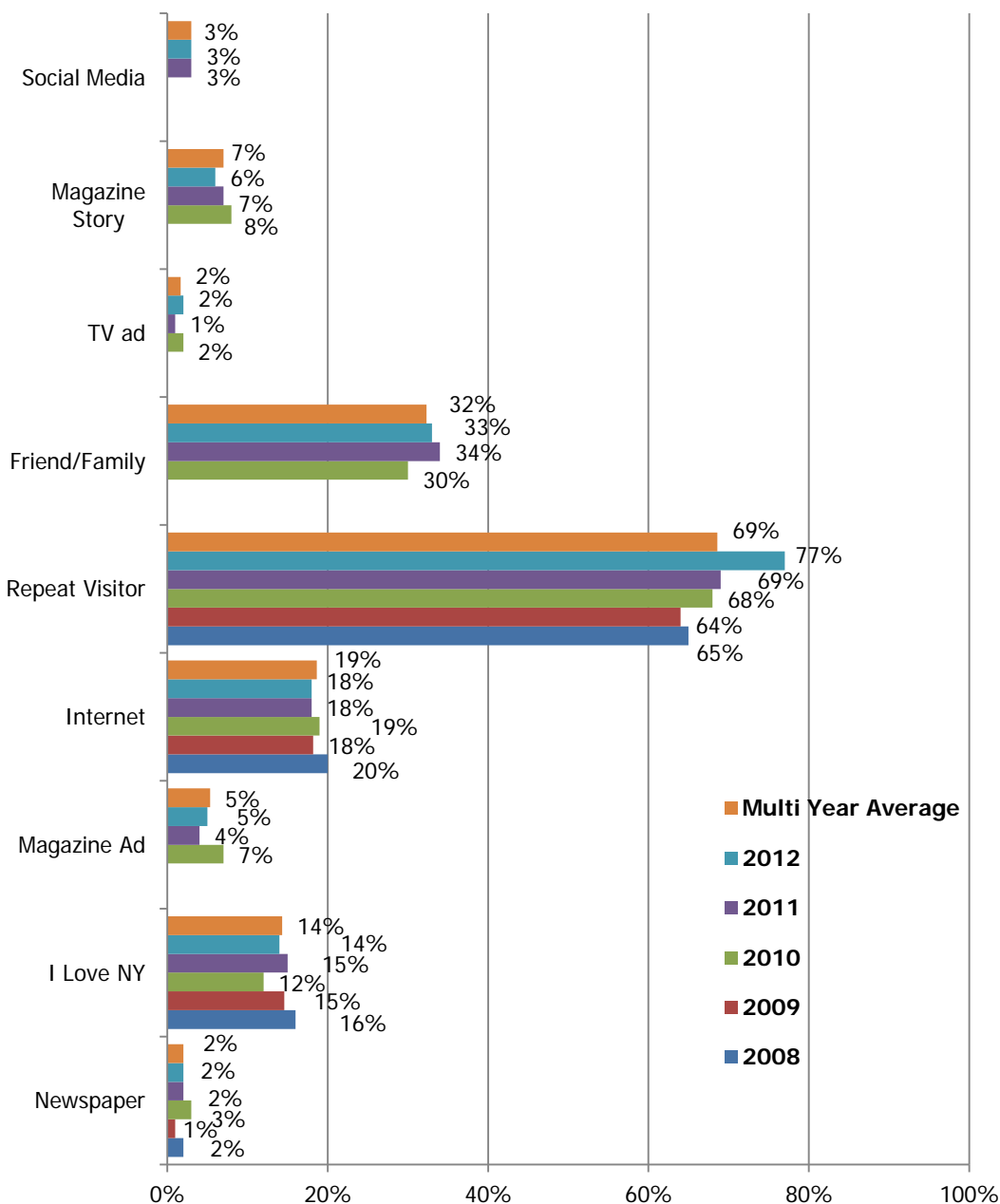


New York State (including the NY metro area) and eastern Canada, not surprisingly, dominate the media market representation of survey respondents. Major northeastern metropolitan areas such as Boston, MA, Philadelphia, PA, Washington, DC and Hartford, CT comprise a secondary presence. The prevalence of visitors from the much smaller Binghamton, NY DMA is notable. The common presence of other smaller metropolitan areas such as Burlington, VT/Plattsburgh, NY and Watertown/Massena, NY is not surprising given the proximity.

INFLUENCE TO VISIT

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 due to changes in survey questions.

Figure 5. Influence to visit



Prior visitation continues to be the strongest influencing factor by far. Seventy-seven percent (77%) of respondents in 2012 reported that a previous visit inspired their return trip. This is the highest response in this category noted during the survey's nine-year duration.

The category of "friend or family" remains the second strongest reported factor of influence, followed by internet materials and I Love NY travel guide/materials. Each of these areas demonstrate relatively consistent levels of influence in comparison to other years.

Table 1 below provides the multi-year averages of influencing factors which were reported during this duration (for those with 4 or more years data):

Table 1. Multi-Year Averages of Reported Influence to Visit Factors

Magazine Story		TV Ad	Friend/ Family	Repeat Visitor	Internet	Magazine Ad	I Love NY	Newspaper
Multi-Year Average of Influencing Factors for Visits	7%	2%	32%	69%	19%	5%	14%	2%

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

Social Media Respondents

Friends and family, internet and social media were factors more frequently reported by these respondents as influencing their visit(s) in 2012. Friends and family was a particularly notable strong influence (selected by 42% of social media respondents versus only 33% of all other respondents).

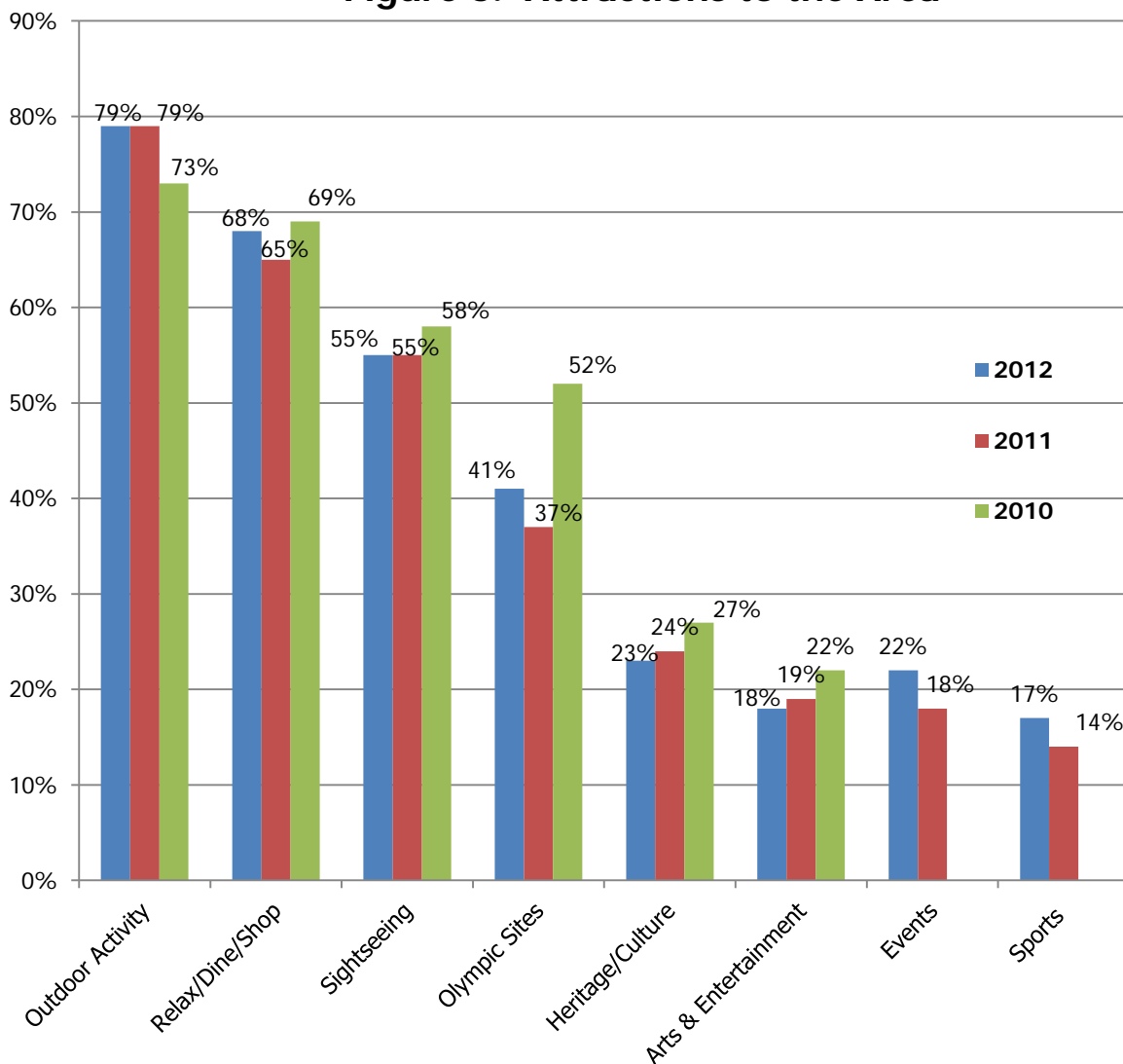
Social media respondents were notably *less likely* to report a prior visit (70% vs. 77% of all other respondents) as a major influencing factor.

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 2012, in comparison with responses from the prior two years. The “events” and “sports” categories were new to the survey last year.

Figure 6. Attractions to the Area



Outdoor activities remained the largest draw to Essex County. Relaxing, dining and shopping, followed by sightseeing are secondary strong draws to visit the region. It is notable that outdoor activities maintained its high level of frequency from the prior year's survey. Sports, events and Olympic sites all demonstrated increases in reported draw over the prior year. Arts and entertainment and culture showed slight decreases in reported visitor draw from prior years. Visitors from 2012 showed notably higher interest in "active" pastimes.

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 multi-year averages of these attractions, by percentages of responses, for those which were listed as choices for at least three-years during this time.

Table 2. Multi-Year Average of Reported Attractions to Visit

Category	Percentage of Respondents
Outdoor activities	77%
Relax/dine/shop	67%
Sightseeing	56%
Olympic sites	43%
Heritage/culture	25%
Arts/entertainment	20%

Within 2012 data, frequent "other" attraction responses included motorcycling and photography most frequently, followed by camping, golfing, sailing, wine tasting, visiting friends, snow sports and birding. For a complete list refer to Appendix D (Open Ended Responses).

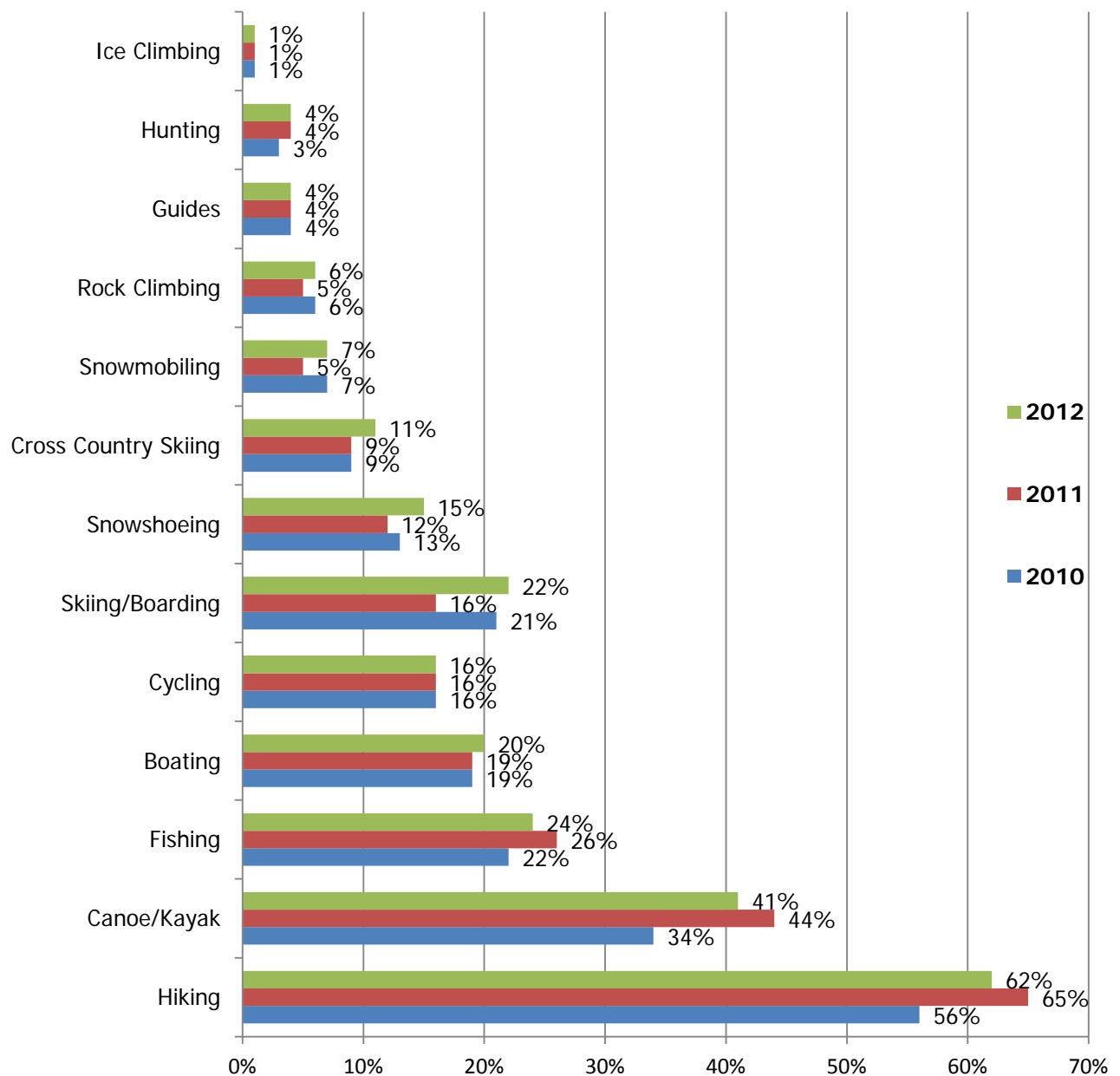
Social Media Respondents

This sub-group of respondents reported substantially higher levels of attraction to outdoor activities (87% vs. 78% all others) and arts/entertainment (22% vs. 18% all others). Social media respondents reported slightly less frequent interest in Olympic sites, events, sightseeing, relaxing/dining/shopping and sports.

Outdoor Activities

Given the consistent popularity of outdoor activities as a draw to the region, a question was added to the survey in 2011 to expand upon 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 three comparative years. Figure 7 depicts the responses from 2010-2012 visitors regarding the attraction of specific outdoor activities.

Figure 7. Outdoor Activities



Hiking continues to be the most popular reported outdoor activity draw, followed by 2) canoeing/kayaking, 3) fishing, 4) skiing/boarding and 5) boating. It is notable that the top three outdoor activity draws dropped slightly in reported popularity among 2012 visitors.

Likely due at least in large part to an improved snowfall year, all four snow-based outdoor activities (skiing/boarding, cross-country skiing, snowshoeing and snowmobiling) showed an increase in reported interest in 2012 over the prior year. Boating and rock climbing also grew slightly as reported outdoor activities of interest among 2012 visitors, based on the prior year.

Among those who responded to the “other” category, the three most common responses (in descending order) were: 1) camping, 2) golf and 3) swimming. Other popular responses included ice skating, ironman, walking, running, dog sledding, photography and motorcycling. See Appendix D (Open-Ended Responses) for a complete list.

Social Media Respondents

This sub-group of respondents were much more likely than “all other” respondents to select hiking, canoeing/kayaking, boating and rock climbing as outdoor activity draws. They were also notably less likely to select cross-country skiing, and to a lesser extent, skiing and boarding, as activities of interest in 2012.

SUB-REGION VISITATION

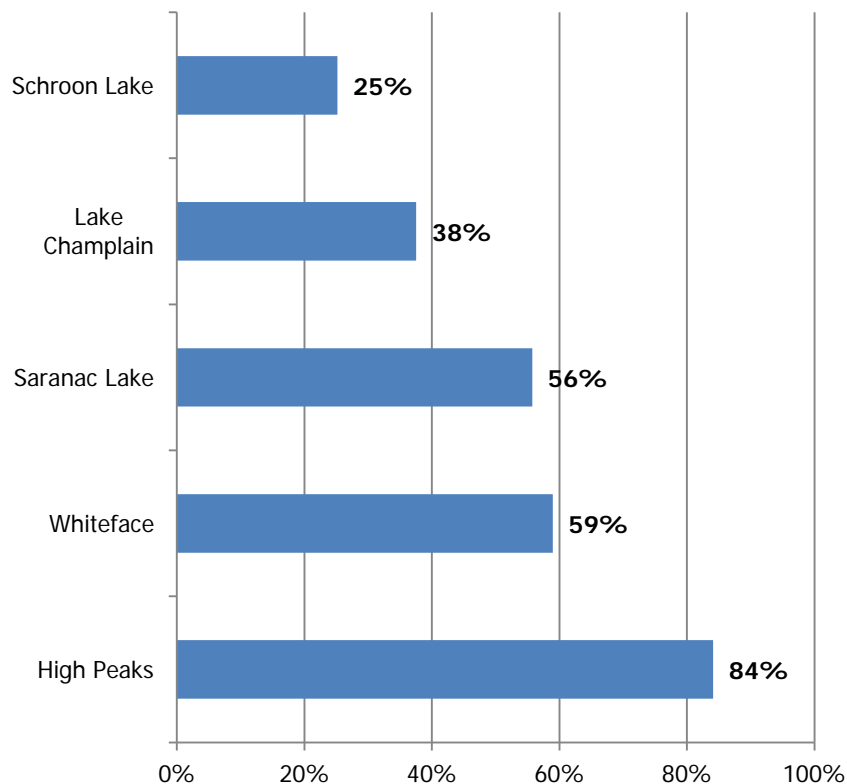
Essex County encompasses a large geographic region of approximately 1,900 square miles. Visitors were asked in the survey which regions within the county they had visited, or were most interested in visiting.

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. The High Peaks sub-region continues to dominate this list. More than one-third of respondents stated that the Lake Champlain area was of interest. One-quarter of respondents reported interest in the Schroon Lake area. These levels of interest sub-regionally are consistent with the prior year measurements.

Social Media Respondents

This group showed an even higher level of interest in the High Peaks region than “all other” respondents. Social media respondents also indicated slightly higher levels of interest in Lake Champlain and Schroon Lake than “all others”.

SATISFACTION WITH LEISURE TRAVEL-RELATED INFORMATION PROVIDED

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

Ninety-three percent (93%) 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 leveling off of overall satisfaction with travel-related information at this rate over the last several years.

Table 3. Five Year Average of Satisfaction with Travel Information Provided

	5 Year Average	2012	2011	2010	2009	2008
Satisfied with travel information provided	94%	93%	93%	93%	95%	96%

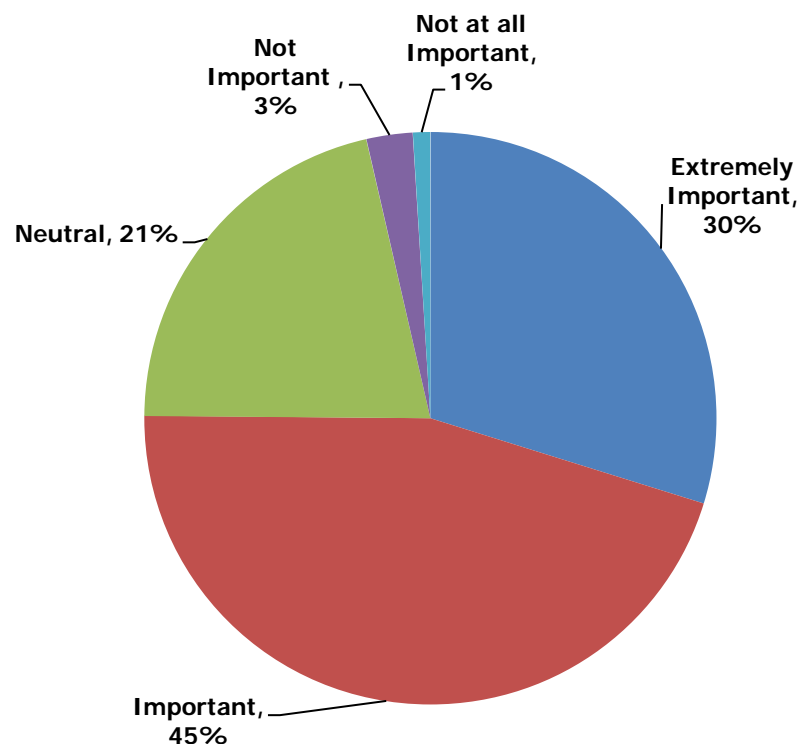
Social Media Respondents

This sub-group reported a consistent level of satisfaction (93%) for travel information as “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



Three-quarters of respondents to this question stated that ecological or environmental sensitivity considerations are “important” or “very important”. It should be noted that there was an anomalously high no-response rate to this question however, which implies that there may be greater neutrality to this question than demonstrated.

Social Media Respondents

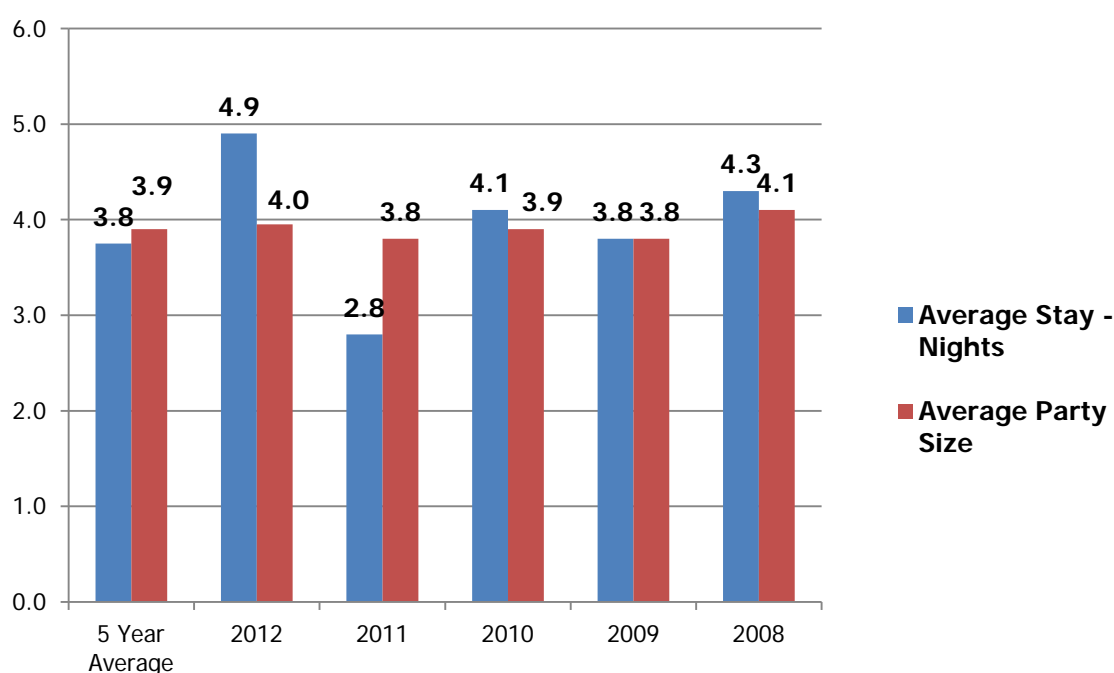
This group indicated that this issue was of slightly higher importance than for “all other” respondents.

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 2012 visitors jumped substantially to nearly 5 nights. A daytrip is considered zero nights stayed. This average duration of stay is much higher than reported during the prior year and the average stay duration of the last five years. It appears that the reduced trip duration and frequencies, which were seen widely during the recession, were erased during 2012. It will be important to note if this trend continues as it could mean great gains for regional tourism.

The mean reported visitor party size for 2012 was 4 persons, a slight gain from the prior year and very near the five year average. This includes an average of 3.22 adults and 0.73 children. Both adult and child party composition increased slightly from 2011.

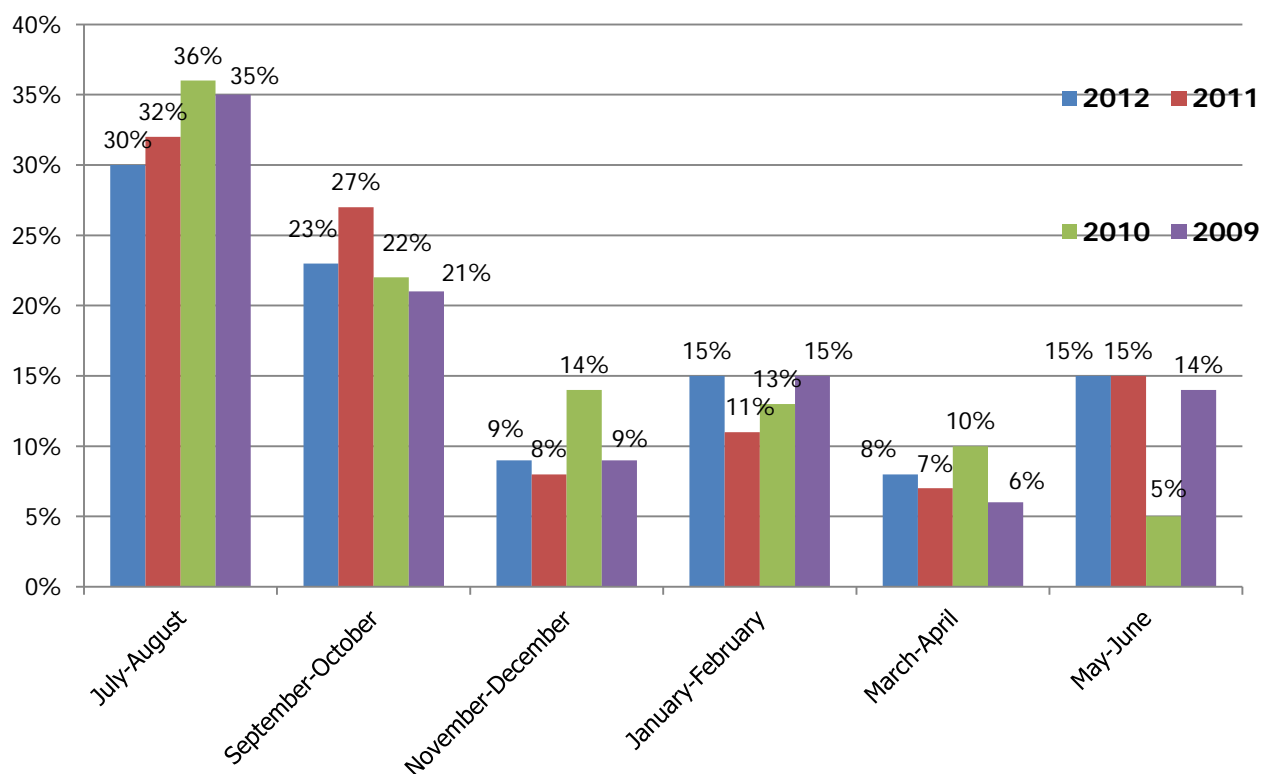
Social Media Respondents

The average duration of stay for social media respondents was slightly longer (5.1 nights) than the duration reported for “all other” respondents (4.9 nights). The average party size and composition for social media respondents was slightly smaller for both adults and children than that for “all other” respondents (2.78 adults and 0.62 child).

Season of Visit

Survey respondents were asked about the timing of their visit(s) to the region during 2012. Figure 11 depicts this information in comparison to the prior three years.

Figure 11. Time of Year Visited



While peak summer (July and August) remains the most commonly reported time for visitation, it is notable that the proportion of visits at this time have fallen steadily. Also, while foliage season (September and October) remains the second most commonly reported visited season, its reported popularity fell from the prior year.

Gains in mid-winter (January-February) visitation were reported among 2012 visitors, perhaps due to strong snowfall and winter sports. The “shoulder season” months of November/December and March/April held fairly steady in reported visitation, in comparison to the prior year, as did early summer (May/June).

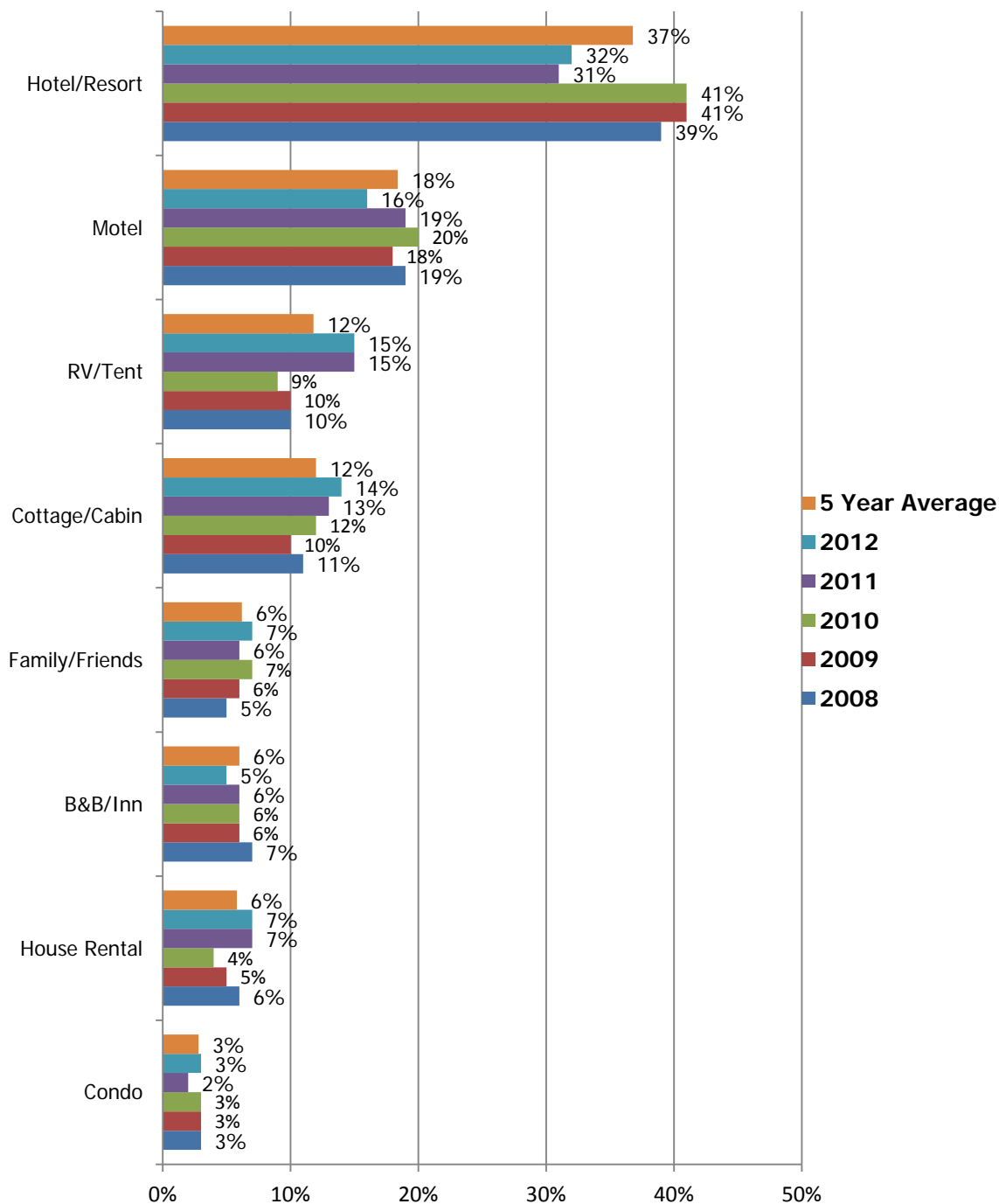
Social Media Respondents

Very little variation in reported timing or season of visitation was noted among social media respondents in comparison to “all other” respondent groups.

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 respondents, with a consistent frequency of this selection from the prior year. Motels remained the second most common selection among all respondents by a narrow margin, dropping slightly in reported popularity.

Reported use of rented cabins or camping in an RV/tent has increased over the last several years. Among 2012 visitors, the reported use of these simpler accommodation types nearly meets the frequency of reported motel stays. Other selections, including staying with friends and family, stayed consistent from 2011 visitor reporting.

The following table provides the averages of responses for lodging choices from 2008-2012:

Table 4. Five Year Average of Lodging Responses

Category	Five-year Average of Response Frequency
Hotel	37%
Motel	18%
RV/Camping	12%
Cottage/ cabin	12%
Family/ friends	6%
B & B/ inn	6%
Private house rental	6%
Condominium	3%

It will be interesting to note the impacts and trending of camping and cabin rental for accommodation selections. The popularity of these choices has increased over the last several years.

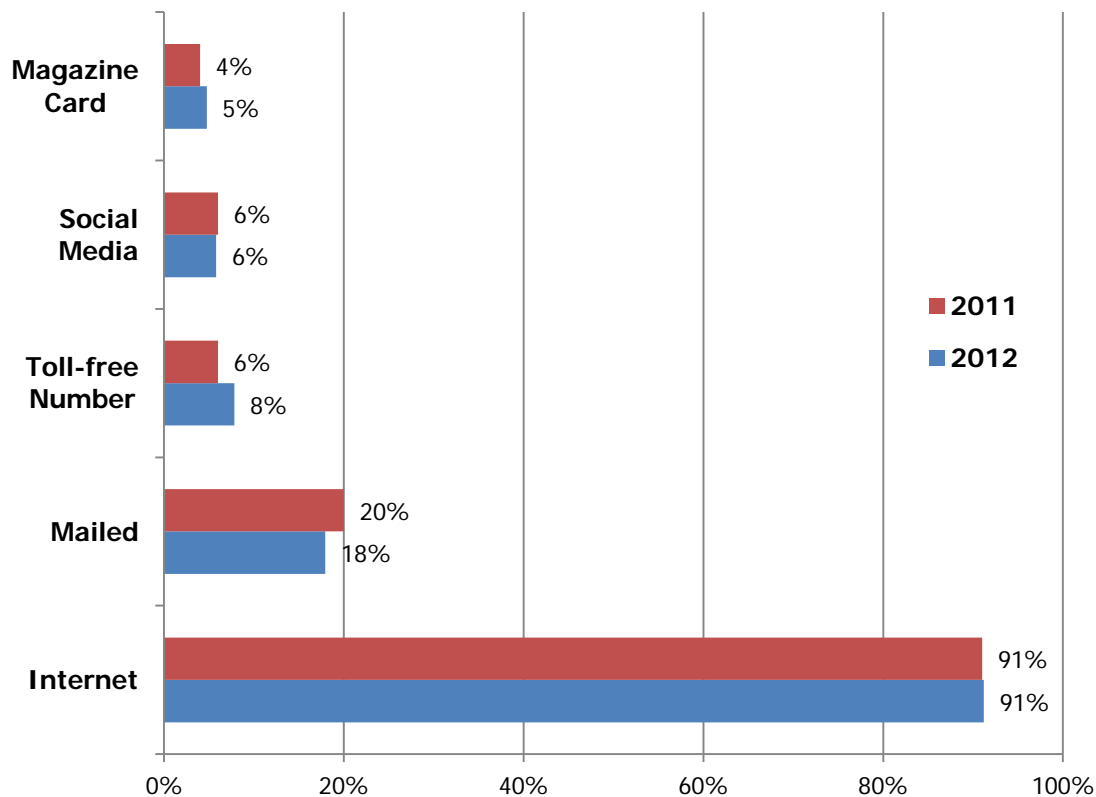
Social Media Respondents

This sub-group of respondents were substantially more likely to report camping in an RV or tent, or staying with family and friends. Social media respondents were also less likely to report staying in a motel. Reported accommodations among this sub-group have fluctuated widely each year.

METHOD OF TRAVEL RESEARCH

As a new question last year, visitor respondents were asked about the different methods used to make their travel plans. The following chart depicts the results of this inquiry among 2011 and 2012 visitors.

Figure 13. Method of Travel Research



Not surprisingly, internet research is carried out by the vast majority of all visitors. A slight increase in reported usage of the Office's toll free number was offset by a slight decrease in reported usage of mailed information requests. Otherwise figures were consistent across these two years.

Social Media Respondents

These respondents were slightly more likely to report using the internet to research travel plans (93% vs. 91% of "all other" respondents). Social media respondents were also, not surprisingly, much more likely (13% vs. 6% of "all other" respondents) to use social media to research travel plans.

LEISURE VISITOR SPENDING

Visitor respondents were asked to provide specific estimates of their daily spending in various categories during their 2012 trip to Lake Placid/Essex County. Estimated leisure visitor expenditures reported *per each visitor party per day* decreased across all categories except transportation (which stayed consistent) from the prior year. These daily estimated spending levels were also notably lower than the mean across these five years. However, overall estimated spending levels rose due to longer visit duration.

The following table provides a comparison of estimated expenses tabulated for the past five years, as well as a five-year average (all provided in whole dollars).

Table 5. Essex County Mean Estimated Visitor Expenditures 2008-2012						
CATEGORY	2012 Mean Expenditure (Per Visitor Party per Day)	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)	5 Year Average Mean Expenditure (Per Visitor Party per Day)
ATTRACTIONS & EVENTS	\$15	\$21	\$39	\$46	\$40	\$32
ENTERTAINMENT	\$14	\$21	\$35	\$46	\$37	\$31
TRANSPORTATION	\$37	\$37	\$43	\$41	\$36	\$39
LODGING	\$147	\$191	\$139	\$171	\$164	\$162
MEALS	\$68	\$103	\$70	\$80	\$74	\$79
SOUVENIRS/SHOPPING	\$34	\$55	\$49	\$54	\$50	\$48
ALL OTHER	\$11	\$25	\$56	\$82	\$52	\$45
AVERAGE DAILY EXPENDITURE	\$326	\$453	\$431	\$520	\$453	\$436

Length of visit jumped considerably among 2012 visitors which more than compensated for this lower level of daily spending depicted above. Total estimated expenditures among all visitor respondents in 2012 was \$1,597 compared to \$1,268 among 2011 visitors. It will be interesting to continue to watch if longer trips, with lower daily spending levels, persist as (and if) economic recovery continues. A stronger interest in generally lower cost accommodations (camping and cabin/cottage rental) was noted within this year's survey.

Social Media Respondents

Social media group respondents from 2012 reported just slightly lower overall higher daily visitor spending than "all other" respondents. Higher daily expenditures were reported among this subgroup in the areas of transportation and "other" expenses. This similar spending model is consistent with two of the last three years. Visitors during 2011 from the social media sub-group reported higher levels of daily spending than "all others".

An analysis of total spending indicates a slightly higher overall expenditure level among the social media subgroup. Given the slightly longer average reported stay (5.1 nights vs. 4.9 nights of "all others"), the total estimated spending per visit among social media groups was \$1,658 (compared to \$1,597).

Table 6. Social Media vs. "All Other" Respondent Expenditures per Day

Expenses/Per Party Per Day for 2012	Social Media Respondents	"All Other" Respondents
Lodging	\$145	\$146
Meals	\$67	\$68
Shopping	\$27	\$35
Entertainment	\$13	\$15
Attractions/Events	\$15	\$15
Transportation	\$42	\$37
Other	\$16	\$11
Total	\$325	\$327

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 Study¹ 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”, or “helped me decide not to visit the region”.

Figure 14 below 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. The net conversion rate can be used as a much more conservative quantitative measure of return.

Figure 14. Influence of Travel Information

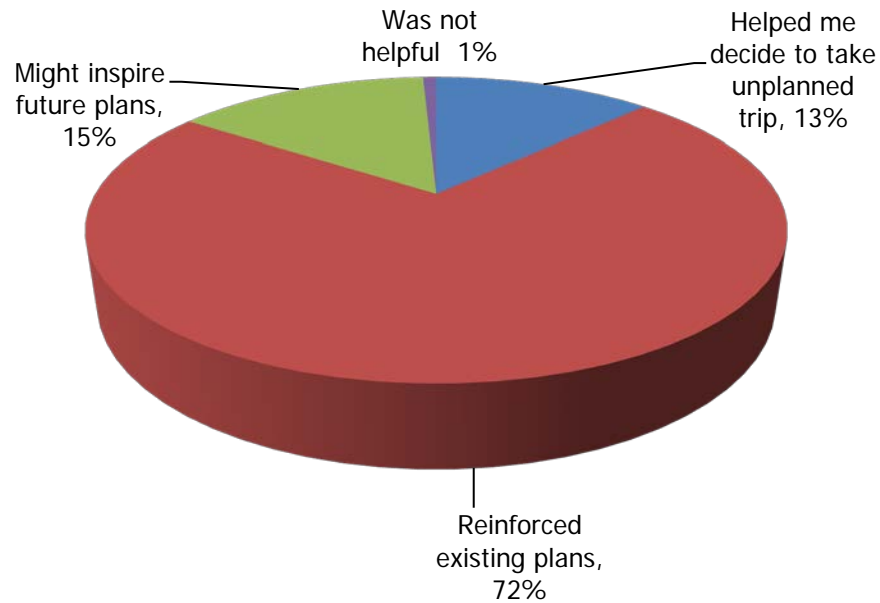
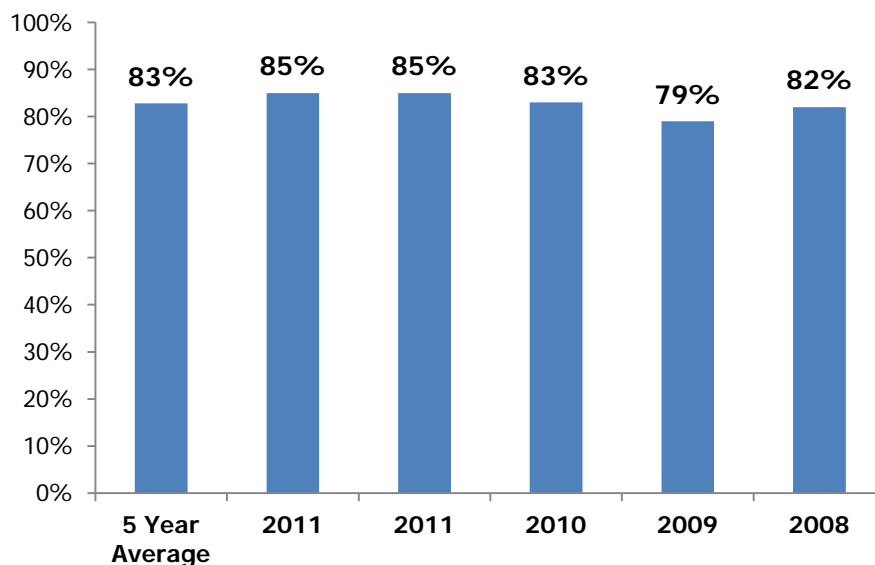


Figure 15 below depicts the gross conversion rates for the last five years. This demonstrates the percentage of visitors who have been positively influenced to travel to the area as a result of information received from ROOST or from their contact with its offices. These figures have remained quite consistent across five or more years, showing the steady, strong impacts of marketing investments made by ROOST in impacting visitor behavior to travel to Essex County.

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



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 2012 estimated visitor count is tabulated by multiplying the number of leads generated by ROOST (those who contacted their office during 2012 for information) by the conversion factor and by the average party size (determined by this survey).

101,998 (direct leads) X 85% (gross conversion factor) x 3.95 (average party size)

342,458 = estimated visitors in 2012

The estimated count of visitors likely influenced by ROOST to visit the region was 342,458 in 2012. This represents a small increase (about 1%) of estimated visitation increase from the prior year.

In 2012, Essex County spent \$1,694,051 of occupancy tax dollars for tourism marketing purposes. This yields a \$4.95 marketing cost per visitor based on occupancy tax expenditures (\$1,694,051/342,458).

Multiplying the estimated number of visitors by the 4.9 average night stay provides an estimated *1,678,044 total visitor nights* stayed in Essex County in 2012. This represents a record high during the survey history. This is a result of continued strong visitor conversion and lead generation by ROOST, and longer visits and larger party size among 2012 visitors.

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:

*101,998 (number of direct leads) x 85% (gross conversion factor)
x \$326 (mean visitor party expenditure per day) x 4.9 (mean length
of stay in nights)*

= \$138,491,900 (total estimated revenue generated by visitors in 2012)

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

\$138,491,900 (total estimated visitor revenue) / \$1,694,051 (total marketing dollars spent through occupancy dollars)

Return on Investment (ROI) = 82:1

The above calculations show that the total estimated revenue generated by visitors was over \$138 million in 2012. This produces an estimated ROI of \$82 in leisure visitor-related revenue for every occupancy tax dollar of tourism marketing expenditures. The summary chart on the following page (Key Facts Derived from Survey Data) provides estimated returns based on several budgetary breakdowns.

Table 7 below depicts returns on investment during the past five years. The return on investment, based on the 2012 visitor survey, is equal to the five year average.

Table 7. Five Year Average Occupancy Tax Return on Investment

	5 Year Average	2012	2011	2010	2009	2008
Five- Year Essex County Occupancy Tax ROI	82:1	82:1	89:1	65:1	89:1	86:1

Return on Investment (ROI) for visitor spending in Essex County appears, as was the case last year, to have rebounded from figures seen in 2010 when marketing expenditures (such as state matching funds) were removed. These figures are positive indicators of an improved market and demonstrated high returns on the dollars spent to reach leisure visitors to Essex County in 2012.

KEY FACTS DERIVED FROM SURVEY DATA

	5 Year Average	2012	2011	2010	2009	2008
Number of Completed Survey Respondents	2,215	4,037	1502	1,348	1,526	2,663
Average Income of Respondents	\$93,276	\$98,456	\$102,500	\$80,000	\$93,211	\$92,213
Mean Age of Respondents	51	51	49	52	50	52
Direct Inquiries to Essex County via the Bureau	88,447	101,998	104,886	60,604	83,753	84,993
Average Night Stays/ Party	4.0 Nights	4.9 Nights	2.8 Nights	4.1 Nights	3.8 Nights	4.3 Nights
Overnight Visitor Stays	1,123,229	1,678,044	948,590	805,379	955,423	1,228,708
Average Party Size	3.9 Persons	4.0 Persons	3.8 Persons	3.9 Persons	3.8 Persons	4.1 Persons
Conversion Factor Rate	83%	85%	85%	83%	79%	82%
Average Daily Expenditure per Party	\$436	\$326	\$453	\$431	\$519	\$453
Total Leisure Visitor Expenditures	\$122,172,986	\$138,491,900	\$117,120,427	\$89,004,798	\$130,490,357	\$135,757,449
Essex County Occupancy Tax and Matching Funds	NA	\$1,737,496	\$1,386,583	NA	\$1,563,032	\$1,663,976
Occupancy Tax and Matching Funds ROI	NA	80:1	84:1	NA	83:1	82:1
Essex County Occupancy Tax	\$1,482,831	\$1,694,051	\$1,318,029	\$1,364,634	\$1,465,665	\$1,571,777
Essex County Occupancy Tax ROI	82:1	82:1	89:1	65:1	89:1	86:1
Total Bureau Budget	\$1,926,501	\$2,042,001	\$1,668,742	\$1,941,061	\$1,915,274	\$2,065,427
Total Bureau Budget ROI	64:1	68:1	70:1	46:1	68:1	66:1
Total Budget & Regional Co-op	NA	\$2,884,941	\$2,262,649	NA	\$2,714,634	\$2,860,642
Total Budget & Regional Co-op ROI	NA	48:1	52:1	NA	48:1	47:1

SOURCES CITED

1. 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.
2. U.S. Department of Commerce, International Trade Administration- Office of Travel and Tourism Industries. "International Visitation in the United States- 2011-2012".

APPENDICES

APPENDIX A: DESIGNATED MARKETING AREAS (DMAS) OF ALL SURVEY RESPONDENTS 2012

Designated Marketing Areas:

Albany-Schenectady-Troy, NY	612	Kansas City KS	11
Rochester,-Buffalo NY	428	Denver, CO	10
New York Metro - Long Island, NY	398	Grand Rapids Battle Creek, MI	10
Ontario, Canada	366	Raleigh-Durham-Fayetteville, NC	10
Syracuse, NY	305	Dallas Ft. Worth, TX	9
Newark NJ	241	San Francisco-Oakland-San Jose, CA	9
Quebec, Canada	218	Portland ME	8
Boston, MA-Manchester, NH	170	Elmira NY	8
Philadelphia, PA-	149	Salt Lake City Utah	8
Washington DC, VA MD	104	Sacramento-Stockton-Modesto, CA	8
Binghamton, NY	89	San Antonio, TX	8
Hartford-New Haven, CT	78	Houston, TX	7
Burlington, VT-		Las Vegas NV	7
Plattsburgh, NY	60	Charlotte, NC	7
Watertown/ Messena NY	56	Ft. Wayne, IN	7
Harrisburg-Lancaster-Lebanon-York, PA	51	Hattiesburg MS	7
Atlanta, GA	50	Winston salem NC	6
Vermont	47	United Kingdom	5
Tampa-St. Petersburg- FL	39	Anaheim Ca	5
Springfield-Holyoke, MA	38	Los Angeles, CA	4
Watertown, NY	35	Madison, WI	4
cleveland OH	33	Chattanooga, TN	4
Johnstown-Altoona, PA	26	Rural Ohio	4
Columbus, OH	24	Winnepeg MB Canada	4
Utica, NY	23	Fayetteville AR	4
Detroit, MI	21	Indianapolis, IN	3
Chicago, IL	20	spokane WA	3
Cleveland-Akron-Canton, OH	17	Traverse City MI	3
Pittsburgh, PA	15	Lincoln NE	3
Wilmington del.	15	Calgary Alberta Canada	2
Cincinnati, OH-KY	13	South Bend IN	2
Minneapolis St. Paul, MN	13	Wheeling WV	2
		Columbia SC	2

Cedar Rapids Iowa	2
Wilmington, NC	1
Myrtle Beach-Florence, SC	1
Peoria-Bloomington, IL	1
Germany	1
Fairbanks AK	1

APPENDIX B: TABLES- FIVE-YEAR AVERAGES 2012

Demographics	5 Year Average
Mean Income	\$93,276
Mean Age of Respondents	50.5

Influence to Visit Region	5 Year Average
Repeat	69%
Internet	19%
I Love NY	14%
Newspaper	2%

Regional Attractions	5 Year Average
Outdoor activities	72%
Relax/dine/shop	67%
Sightseeing	56%
Olympic Sites	43%
Heritage/culture	25%
Arts/Entertainment	20%

Travel Information	5 Year Average
Satisfied with Information	94%

Visit Information	5 Year Average
Duration	3.8
Party Size	3.9

Lodging Selections	5 Year Average
Hotel	38%
Motel	18%
RV/Camper	12%
Cottage/Cabin	12%
Family/Friends	6%
B & B/Inn	6%
Private House Rental	6%
Condominium	3%

Expenditures	5 Year Average Mean Expenditure Essex County Per Visitor Party per day
Category	
Attractions	\$32
Entertainment	\$31
Transportation	\$39
Lodging	\$162
Meals	\$79
Souvenirs	\$48
All Other	\$45
Average Daily Expenditure	\$436

**APPENDIX C. FULL COMPARISON DATA FOR SOCIAL MEDIA RESPONDENTS vs.
"ALL OTHER" RESPONDENTS**

Question/Response		Social Media	All Other
Total 4037 Respondents		374 respondents	3663 respondents
Did you travel in 2012?			
Yes	89%	91%	88%
No	11%	9%	12%
How many in your travel party?			
Adults	3.22	2.78	3.27
Children	0.73	62	0.74
How many nights did you stay?			
	4.9	5.1	4.9
How many leisure trips here in 2012?			
1	53%	53%	53%
2	24%	23%	24%
3 or more	23%	25%	23%
Expenses/Per Day			
Lodging	\$147	\$145	\$146
Meals	\$68	\$67	\$68
Shopping	\$34	\$27	\$35
Entertainment	\$14	\$13	\$15
Attractions/Events	\$15	\$15	\$15
Transportation	\$37	\$42	\$37
Other	\$11	\$16	\$11
Total Daily	\$ 326.00	\$325	\$327
Total Trip	\$1,597	\$1,658	\$1,602
How did you research your travel plans			
Toll free phone number	8%	4%	8%
Internet	91%	93%	91%
Social media	6%	13%	5%
Mailed a request for information	18%	13%	18%
Magazine request card	5%	2%	5%
Other	12%	13%	12%
Lodging choices			
Hotel	32%	31%	32%
Motel	16%	11%	17%
Cabin/cottage	14%	15%	14%
RV/tent	15%	18%	14%
Family/friends	7%	10%	7%
Private	7%	7%	7%
B&B/Inn	5%	6%	5%
Condo	3%	2%	3%
Time of Year Visited			
July-August	30%	30%	30%
September-October	23%	25%	22%
November-December	9%	9%	9%
January-February	15%	14%	15%
March-April	8%	8%	8%
May-June	15%	14%	15%
Why did you visit?			
Been before	77%	70%	77%
I Love NY guide	14%	12%	14%
Friend/family	33%	42%	33%
Internet	18%	19%	17%
Magazine ad	5%	4%	5%
Newspaper ad	2%	1%	2%
TV ad	2%	2%	2%

APPENDIX C. FULL COMPARISON DATA FOR SOCIAL MEDIA RESPONDENTS vs. "ALL OTHER" RESPONDENTS

Magazine story	6%
Social Media	3%
other	19%
Area of interest	
High Peaks	84%
Whiteface	59%
Lake Champlain	38%
Schroon Lake	25%
Saranac Lake	56%
Other	11%
What attracted you to the area?	
Outdoor activity	79%
Arts & Entertainment	18%
Heritage	23%
Olympic sites	41%
Events	22%
Sightseeing	55%
Sports	17%
Relaxing	69%
Other	8%
What outdoor activity attracted you to the area?	
Hiking	62%
Cycling	16%
Canoe/Kayak	41%
Guides	4%
Fishing	24%
Boating	20%
Hunting	4%
Rock climbing	6%
Skiing/Boarding	22%
Cross Country Skiing	11%
Snowshoeing	15%
Ice climbing	1%
Snowmobiling	7%
Other	11%
How important was ecological/environmental sensitivity in your travel destination?	
Extremely important	30%
Important	45%
Neutral	21%
Not important	3%
Not at all important	1%
No answer	

Did you find all the information you were looking for?	
Yes	93%
No	7%
Level of influence of information	
Helped me decide to take a trip I had not previously planned	13%
Reinforced existing plans to visit region	72%
Might inspire a trip at some other time	15%
Helped me decide not to visit region	0
Was not helpful	1%

4%	6%
9%	3%
18%	19%
88%	84%
59%	59%
40%	37%
27%	25%
56%	56%
13%	11%
87%	78%
22%	18%
24%	23%
38%	41%
20%	22%
53%	55%
15%	18%
66%	69%
6%	8%
75%	60%
15%	16%
51%	40%
4%	4%
25%	24%
25%	19%
5%	4%
9%	5%
20%	19%
6%	11%
15%	15%
1%	1%
7%	6%
8%	11%
28%	30%
49%	45%
20%	21%
2%	3%
0%	1%

93%	93%
7%	7%
15%	13%
67%	72%
8%	14%
0%	0
1%	1%

APPENDIX C. FULL COMPARISON DATA FOR SOCIAL MEDIA RESPONDENTS vs.
"ALL OTHER" RESPONDENTS

Had you visited region before	
Yes	81%
No	19%
Median Age	52
Mean Age	51
Median Annual Household Income	
Income	\$ 100,000
Mean Annual Household Income	98,456

74%	81%	
26%	18%	
46	53	
45	52	
\$ 100,000	\$ 100,000	
\$98,486	98,452	

APPENDIX D: RESPONSES TO OPEN-ENDED QUESTIONS

“Other” (Unedited) Responses to General Area Attractions

academic conference 2006

Adirondack Scenic Railroad

Adirondack Wild

animal track, bird siting

Anniversary trip

antiquing

Attended summer camp as a youth.

Auction antiques show

Ausable Two-Fly Challenge

Backpacking, Photography

Barbershop singing

Beaches

Beautiful scenery

being inside the blue line

Biking (2)

bird watching, leisurely walks

Birding (3)

Boating (2)

Breweries

Camping (55)

camping in motorhome

camping, golfing

camping, nature, train ride, boating

camping, swimming

Chose this route for driving my son to college in Burlington, VT

college visit

Conference

countryside is beautiful

driving the 'back' roads

Eventually others in the near future, cycling, hiking, skiing, canoeing, fishing

Fall Foliage (2)

Family (8)

Farmer's Market in Saranac!

Figure skating program

Fishing

Fishing for the non-competitor

Food

Friends (2)

Getting information for a story I was writing.

golf (19)

got married

Great Lodges

Great motorcycling roads

Great year round population

hanging out with friends

Have been going there for years

hiking, relaxing, sightseeing

History Battle of Lake George 1755

Hockey (3)

Hockey Camp

horse show

hunting (2)

hunting/fishing

I go every summer since i was a child

I got engaged there in 2012!!! Thank you :)

I love the whole feeling of the mountains. Serenity,the spectacular beauty,unspoiled adirondacks

ice skating competition

informal family reunion time

inhaling the mountain air

Ironman (3)

It Is also nice to just sit by the lake and do nothing!

June Conference

just driving around

kayaking

kayaking/camping

kid friendly

lacrosse (2)

lake cruises

Lake swimming in mirror lake

Leaf-Peeping in Autumn

Love the snow

MARRIAGE

Motorcycling (13)

mountain hiking

museums (2)

music/festivals

my job.. my home...ect....

natural beauty (3)

NCAA Hockey

new area to drive to

New job

north pole ny

Northwood School

Oktoberfest

Olympic bobsled

Outdoor when I was younger. Now I just go and appreciate the area.

Outlet Shopping

Past business

People, mountains, water

Perfect stop on our tour of the state

Pet friendly :)

Photography (14)

Playing music

playing with my pup in Mirror lake

primarily hunting and fishing

Professional Conference

quaint village

quiet nature camp

rafting, hb riding

Relaxation (2)

Reliving my youth, vacations from childhood

research for writing

resting

running

Rv camping

Sailing (3)

Santa's Workshop (3)

Saranac Lake Winter Carnival

Scenery and local attractions

Scenic Drives thru Autumn Colors and Mountain Peaks

scenic motorcycle trip with friends from Ottawa

school

Schroon Lake Activities

Seeing old friends

shopping and business contacts

shopping (3)

Six Flags Park

Skating Show

ski, snowshoe,hike

skiing (5)

skiing,snowshoeing

snow shoeing (3)

snow tubing, toboggan chute

snowmobiling (5)

Son in college there

spa and massage therapy

Spa, Holidays

speed skating

Sr. Activities 65+

Summer ice dance sessions

SWIMMING

Swimming in Lake Placid and Mirror Lake - the best!

Synchronized skating (2)

The relaxed ambience of Lake Placid

The sheer beauty ! Peaceful, stress-free, relaxing. I just love it.

the solitude

The Wild Centre

To live there

train / boat tours

Train ride

trekking on the mountain

Triathlon

VACATION RENTAL

vacation with children

Visit friends (2)

visit friends and family (2)

visit friends,visit camp

visiting family (2)

Visiting Paul Smith's College and the Wild Center

WALKING AROUND VILLAGE

We like to take the boat ride on Mirror Lake,

Weddings

when I was young, it would have been sports

Whiteface Mountain Bike Park

Wild Place museum

Wine (4)

winter activities other than ski

winter carnivals

Word of Life (2)

Work (2)

xc skiing

Yoga, shopping

"Other" (Unedited) Responses to Outdoor Activities Attractions

1/2 marathon running
adventuring; walking; shops
all of them
all: summer
amusement parks
ATV Riding
backpack camping (2)
Backpacking (2)
Beach (3)
Bird Watching (9)
boat cruises
Bob Sled (4)
Camping (77)
Can Am Rugby
chasm
chasms, geological areas
curling hockey bobsled
Day trips
Dog Sledding (7)
downhill
driving as to the top of Whiteface
During college I worked at the Ausable Club. We hiked, canoed and partied when possible. As a kid we liked to fish and boat.
eating
Enjoy the beauty of the area
environmental stuff
exploring beautiful area
fall foliage
Festivals
Figure skating (3)
friends
golf (55)
half marathon in Sept.
historic sites (2)
Hockey (2)
Horseback Riding (6)
Horse Show
i attended with my grown children who did skiing and snowboarding
Ice Festival in Saranac
ice fishing (2)
Ice skating (11)
ice skating / hockey

Ice Skating and Running
Ice Skating at Olympic Oval
ice skating, snow tubing
ice skating, swimming
Ironman competition (5)
just being there
kid friendly
Lacrosse tournaments
Lake Placid 1/2 marathon
Lake Placid's mini triathlon for families (Monday evenings)
Lake swimming (2)
lakes
Landscape photography
late fall camping
local agriculture
LOL...Leaf peeping
meeting the local people, the cottages and cabins near water...its all a beautiful and
wonderful area to
miniature golf
motorcycle ride (13)
Mountain Biking
mt. climbing
nature photography (3)
Nature study
nature walks & exploring
olympic activities (bobsledding)
Outdoor ice oval
photo shooting
photography (12)
picnicing with grandkids
relaxation (4)
Resorts & Spas
Roller Blading
Rugby (2)
Running (11)
RV CampIng (3)
Sailing (2)
scenic drives
scuba diving
sheer beauty
Skating, tobogganing, swimming, horseback riding.
Shopping (4)
sight seeing
Skating (14)

Skating on the 1980 Olympic Oval and the 1932 Rink
skating, toboggan, dog sled rides, snow tubing, Saranac Winter Festival, etc.
Skating/pond hockey on Mirror Lake
skeleton
Snow boarding, tubing, etc
snow tubing
Snowmobile (2)
speed skating (4)
sports tournaments
SUP
Swimming (29)
Toboggan (5)
Trail Running
train ride
Triathlon (5)
Tubing
Vacationing/Swimming
Visiting nature museums/wildlife studies/conservation venues
Volunteer ADK
Walking (12)
Watching Nature at its best
Water Skiing (4)
Waterskiing
We enjoy all the seasons, the summer is lovely
we started as leaf peepers and fell in love with the area
What do you mean by "guides" as an outdoor activity?
White water rafting (3)
Winter Camping
winter carnival
Winter games
Winter Sports
Would like to try skiing or snowshoeing, but have not yet visited in the winter.

APPENDIX E: SURVEY INSTRUMENT



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](#)



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.

1. Please tell us, did you travel in 2012?

yes

no

#validationErrorMsg#

2. How many leisure travel visits did you make to the Lake Placid/Essex County region in 2012?

none

one

two

three or more

#validationErrorMsg#

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

yes

no

#validationErrorMsg#

4. When would you be planning to visit?

1 year

2 years

3 years

more than 3 years

#validationErrorMsg#

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:

#validationErrorMsg#

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:

#validationErrorMsg#

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

Heritage & Culture

Olympic Sites

Events

Sightseeing & Touring

Sports

Relaxing, Dining, Shopping

Other activities:

#validationErrorMsg#

8. 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#

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:

#validationErrorMsg#

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

yes

no

#validationErrorMsg#

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

#validationErrorMsg#

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

yes

no

#validationErrorMsg#

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

#validationErrorMsg#

14. On your visit in 2012, 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.](#)

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

#validationErrorMsg#

16. Please indicate the total length of time you spent in the region in 2012?

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#

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

#validationErrorMsg#

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	\$	<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.](#)

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

#validationErrorMsg#

20. Please tell us your Zip/Postal Code:

#validationErrorMsg#

21. Please tell us your
birthyear:

22. Contest winners will be contacted by email.

Please provide your email
address:

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.