

LEISURE TRAVEL STUDY

2013 VISITOR PROFILE AND RETURN ON INVESTMENT – CONVERSION RATE ANALYSIS FOR

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.duley@gmail.com

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EXECUTIVE SUMMARY

Introduction

This study was commissioned to ascertain leisure visitor information and key marketing program statistics 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 intend to reflect impacts produced by the meeting/convention market segments. This study marks a full decade of consecutive annual research being conducted to consistently analyze tourism in Essex County.

ROOST contracted with PlaceMaking, a regional community and economic development research firm, to complete this research. In early 2014, PlaceMaking conducted a survey of 2013 leisure 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 2013. A presentation of visitor trends for the past five years is also included within this analysis.

The number of potential visitors who inquired about travel to Essex County in 2013, and provided contact information (traceable leads), was 133,078. A random sampling of approximately one-third of these visitors were requested to complete the survey. Nearly 3,000 responses were received, from which the following data were generated.

Survey Respondent Data Summary

Highlights of 2013 visitation to Essex County from among all survey respondents included:

Demographics and Visit Information

- Average visitor party age of respondents was 53 years old; this is just slightly older than the five-year average (51).
- The average reported total visitor party size was 4.1 persons, including an average of 3.4 adults and 0.73 children. This showed a very slight growth from average reported 2012 visitor party size (4.0 persons).
- Over half (51%) of visitor respondents reported living in New York State. Visitation from the nearest region of the Albany area (NY) and north was up slightly. Visitation from northeastern states, outside of New York State, was also up slightly.
- The average stay reported by 2013 visitors was 5.1 nights. This represents a slight increase from the 2012 average reported visit duration of 4.9 nights. This figure is also higher than the five year average of 4.1 nights.

- Peaks summer (July/August) and foliage season (September/October) remain the most commonly reported times of visitation, however their dominance has declined over the last several years.
- Hotels remained the most popular reported lodging choice among 2013 visitor respondents. The proportion of visitors who reported staying with family or friends, renting a private house, or renting a condominium increased from the prior year.

Interests

- Outdoor activities remained, by a substantial margin, the largest draw to the area. “Relaxing, dining and shopping” remained the second most frequently reported draw to visit the region. Olympic site visitation grew considerably in response frequency. Sports and events also grew in response popularity in comparison to the prior year.
- Hiking remained the most popular reported outdoor activity among all survey respondents. The following outdoor activity interests were also selected as most popular activities of interest (in descending order): canoeing/kayaking, skiing/boarding, and cycling.
- Almost nine out of ten respondents (88%) reported interest in the High Peaks region of Essex County. More than half of respondents reported interest in the Whiteface and Saranac Lake regions. Approximately one-third of respondents stated that the Lake Champlain area was of interest and just under one-quarter expressed interest in visiting the Schroon Lake area.

Visitor Spending and Conversion

- The average daily visitor party spending in 2013 was estimated at \$323 per day. This is slightly 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 \$1,646 (from \$1,597). These estimated visitor expenditures from 2013 represent a record high across the decade of this research.
- Conversion measurement, the percent of visitors who stated that the information or advertisements viewed either reinforced potential plans to visit or helped them decide to take an unplanned trip, was 81% (and 85% in the year prior).
- The estimated number of leisure visitors to the region in 2013 based on contacts through ROOST and the conversion rate reported by survey respondents is nearly 442,000. This is a record high visitation level from the past ten years of research.
- For each occupancy tax dollar Essex County spent on marketing, visitors to the County spent an estimated \$93. This is a substantially higher return on investment ratio than found in other recent years.

Social Media Respondent Summary

Survey responses collected by those who participated through ROOST social media outlets (Facebook and Twitter) were separated for individual consideration. This is compared below, and throughout the report versus the remainder of the group (collected from all other outlets of contact). It should be noted that the pool of social media-garnered respondents is much smaller than “all other” respondents (241 vs. 2,702).

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. 54 years on average).
- Social media respondents were more likely to have reported visiting the region previously (93% vs. 88%).
- Social media respondents were much more likely to report friends or family, a prior visit, or social media, as influencing their decision to visit in 2013.
- Social media respondents reported higher levels of attraction to outdoor activities, heritage sights and Olympic sites than “all other” respondents. They were notably *less likely* to report relaxing/dining/shopping as an attraction to visiting the region.
- Among those who reported outdoor activities as a draw, social media respondents cited hiking, snowshoeing, and canoeing/kayaking with substantially higher frequency than “all other” respondents.
- Social media respondents were more likely than other respondents to report staying with family or friends, staying at a bed and breakfast or inn, or renting a private house during their 2013 visit.
- Social media respondents reported a slightly longer average duration of stay and a slightly larger average number of children than other respondents.
- Social media respondents estimated higher daily visitor spending in comparison to “all others” (\$340 vs. \$323).

The findings from 2013 data provide greater consistency with the trends of social media respondents noted from 2010 and 2011 visitor data. Last year’s survey data (for 2012) showed varying information about social media visitors, with the exception of consistently longer visits and a younger age demographic.

Conclusion

It is clear from the survey data that 2013 showed another year of improved travel conditions in light of a strengthening economy. The rebound in visitor numbers that was demonstrated in 2012 continued through 2013. Continued funding for marketing efforts such as state matching funds allowed ROOST tourism professionals to carry out their mission. While survey response was down somewhat this year, it remained a healthy 9%. The study researchers encourage ROOST to continue to be vigilant in keeping up-to-date visitor contacts to aid the survey's usefulness in reaching as many visitors as possible.

This study has been employed for a full decade now, allowing for substantial comparison of visitor trends in Essex County. Research findings remain consistent over the past five or more years in most areas, strengthening credibility and highlighting areas where emerging trends (such as social media) are apparent.

This data may be used to enhance and evaluate future marketing efforts, techniques, and marketing channels. 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.

Survey data from 2013 visitors show record visitation to Essex County from across the decade of this research. The expected growth of the U.S. tourism industry in general (as forecasted by the U.S. Department of Commerce) and now two years of strong tourism growth in Essex County provides a bright outlook for these impacts to the region as a whole in the near future.

METHODOLOGY

Background

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a leisure visitor survey for the third consecutive year. The study has employed the same methodology with comparable results for ten years. The survey instrument was designed collaboratively by PlaceMaking and ROOST to gather information from 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 2013. 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 social media outlets (Twitter and FaceBook), 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 to randomly-selected respondents for survey completion. A weekend for two at a luxury property and five Adirondack chairs were 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 C.

A total of 32,771 invitations to participate in the survey were sent by ROOST. Two thousand nine hundred forty three (2,943) responses were received. Researchers removed responses from those who indicated that they had not visited and had no travel plans to Lake Placid or Essex County, for a total of 2,879 complete responses used throughout the report.

The 9% rate of response provides researcher confidence in data validity. It is a lower response than the over 11% received in last year's study but typical of the response rate found across the decade of this visitor research.

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 A.

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 estimated visitor expenditures divided by the marketing dollars spent.

TOURISM INDUSTRY AND VISITOR SUMMARY INFORMATION

Current Tourism Industry Status

According to the U.S Department of Commerce, most indications of travel activity and spending showed positive growth in 2013. The Bureau of Economic Analysis reported an increase in travel and tourism spending of 3.6% during 2013. This was higher than the 2.8% growth seen in travel and tourism spending in 2012².

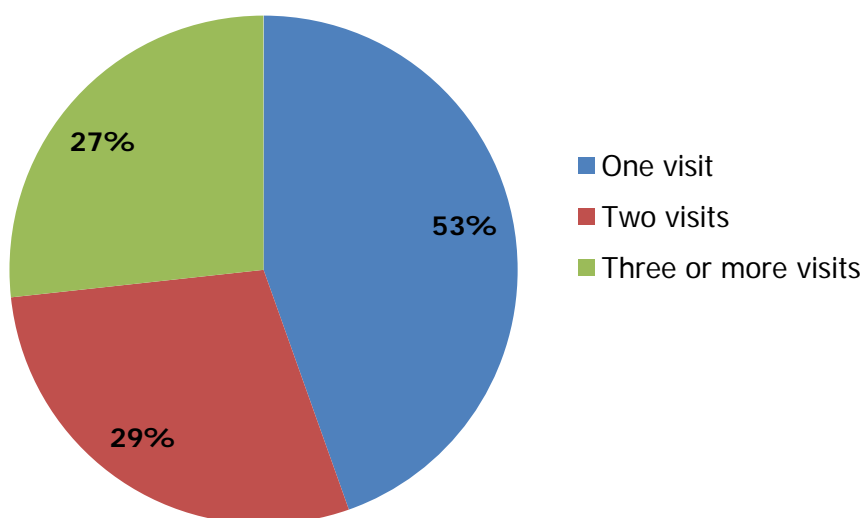
According to the International Trade Administration within the U.S. Department of Commerce, U.S. travel grew 4.7% in 2013 and is forecasted to again grow by another nearly 4% in 2014³. The region receives international visitors, particularly from Canada, which is within a 1.5 hour drive. The reduced travel and spending experienced in the years prior to 2012 appears to have been replaced by expected steady growth.

Survey Respondent Visitation to Essex County

Sixty-six percent (66%) of survey respondents who had visited Essex County or had plans in the future to do so, reported that they visited the region in 2013. Thirty-four percent (34%) of respondents replied that while they had not visited in 2013, 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 2013, 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 those that made 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 2013



Social Media Respondents

This sub-group, as in the prior year of survey data, indicated a higher percentage of travel to the region actually carried out in 2013 (74% vs. 63%). Additionally, social media respondents were slightly more likely (29% vs. 27%) than “all other” respondents to have made three or more visits to the region in 2013. These data suggest that the social media sub-group of visitors may be more committed travelers, in general, or at least to Essex County.

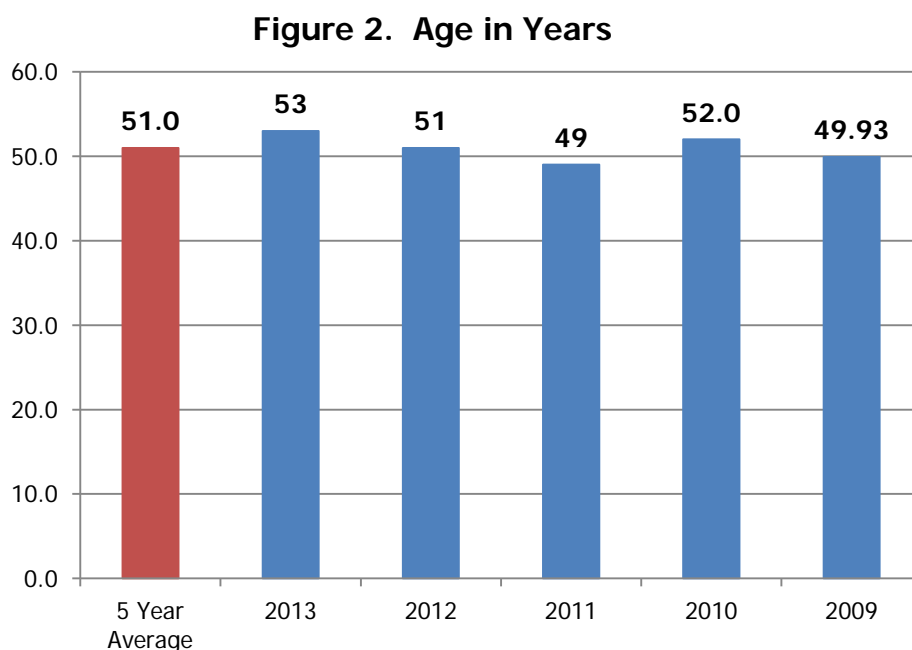
RESPONDENTS' DEMOGRAPHIC PROFILE AND RESIDENCES

Income

Respondents were requested to select an annual household income range. Mean annual household income of visitor respondents is estimated at \$105,550. This is higher than the last several years of average income data. The estimated median annual household income remains at \$100,000, which is consistent with other years.

Age

The mean age of responding visitors in 2013 was fifty-three (53) years old. The median age was fifty-four (54) years old. These ages are slightly higher than found in 2012 but are roughly consistent across the years of survey data. Figure 2 below depicts the mean age of surveyed leisure visitors to the region in 2013 and within the past five years.



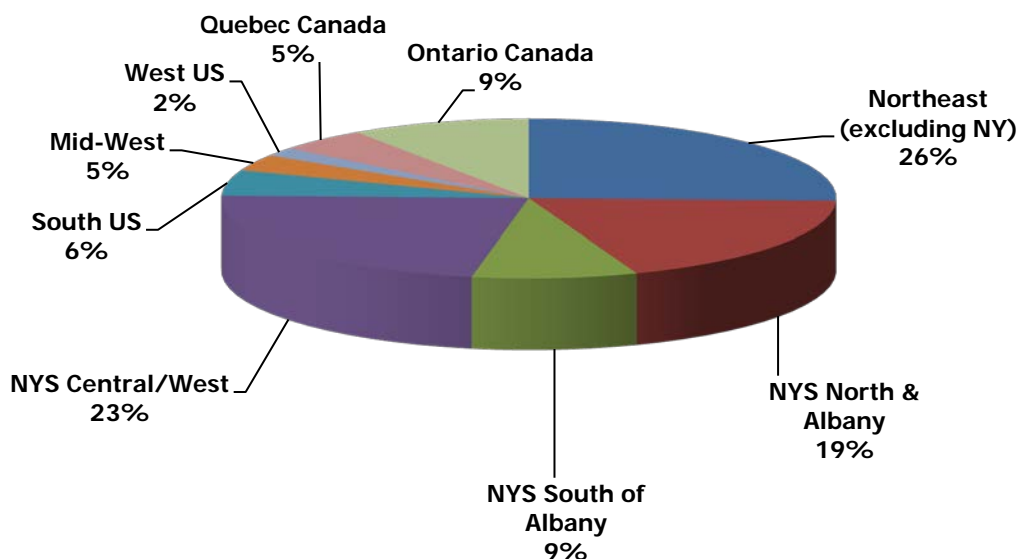
Social Media Respondents

Median income levels were consistent among social media respondents in comparison with all other respondents. Mean income levels of this sub-group however were reportedly lower (\$95,393 vs. \$105,550). This group continued to demonstrate a substantially younger age demographic with a mean of forty-six (46) years old and a median of forty-seven (47) years old.

Area of Residence

Survey respondents were requested to provide their zip code of residence, within 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 Southeastern and Southwestern 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

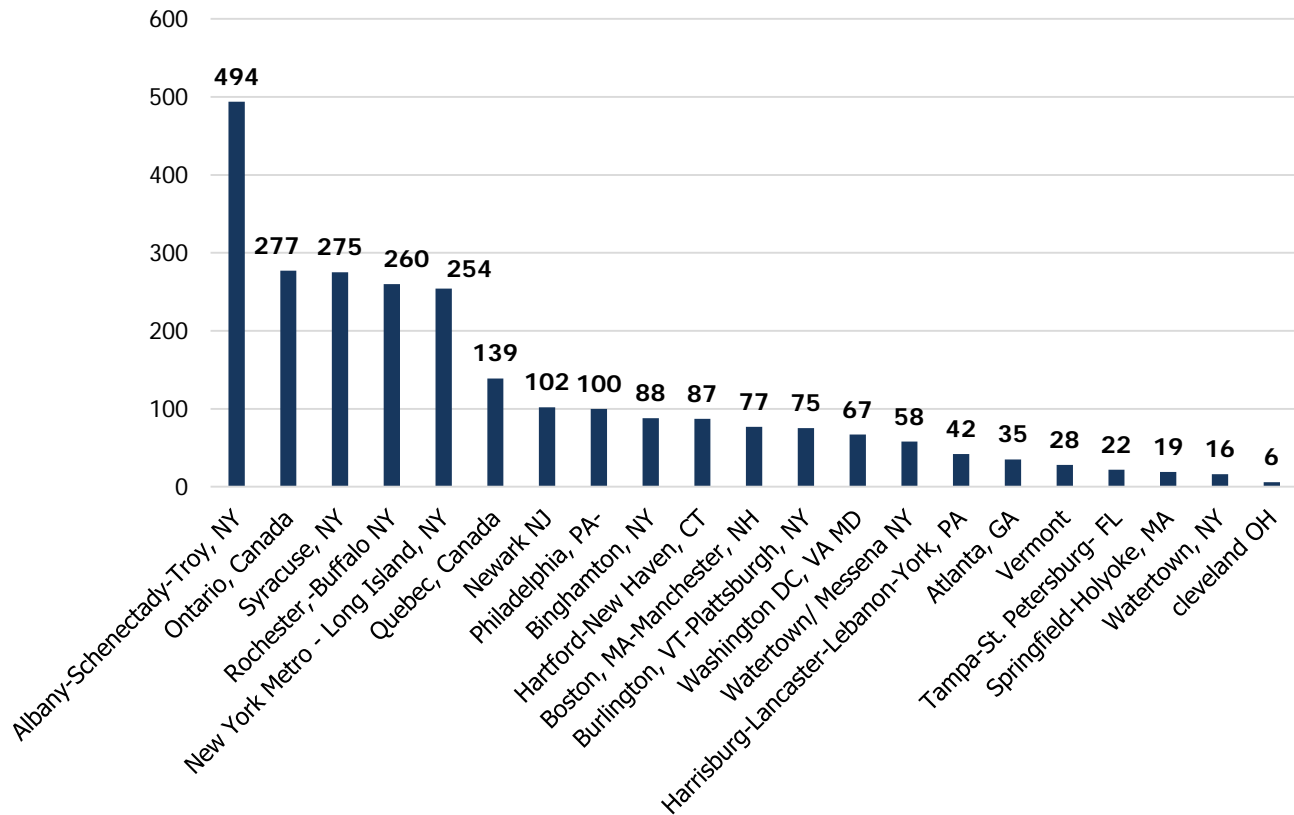


The distribution of visitors is generally similar to that of prior years. Visitation by these broad regions continues to show a large proportion of visitors who live within a day's drive of Essex County. One area of slight growth is visitation by reported visitors from the Northeast, outside of New York State. This increased to 26% of respondents, from 23% in 2012.

Just over half (51%) of visitor respondents reported coming from New York State. The proportion of visitors from Albany/north increased slightly (19% vs. 17% in 2012), while those from Downstate fell just slightly (9% vs. 10% in 2012). The proportion of visitors from Central/Western New York State remained the same. Reported visitor residences by all other regions remained the same as in the prior year.

Figure 4 below provides an analysis of visitor residence by Designated Marketing Area (DMA)s. Designated Marketing Areas were represented within the survey. Only those responses with more than five responses within the survey are displayed.

Figure 4. Major DMAs of Survey Respondents

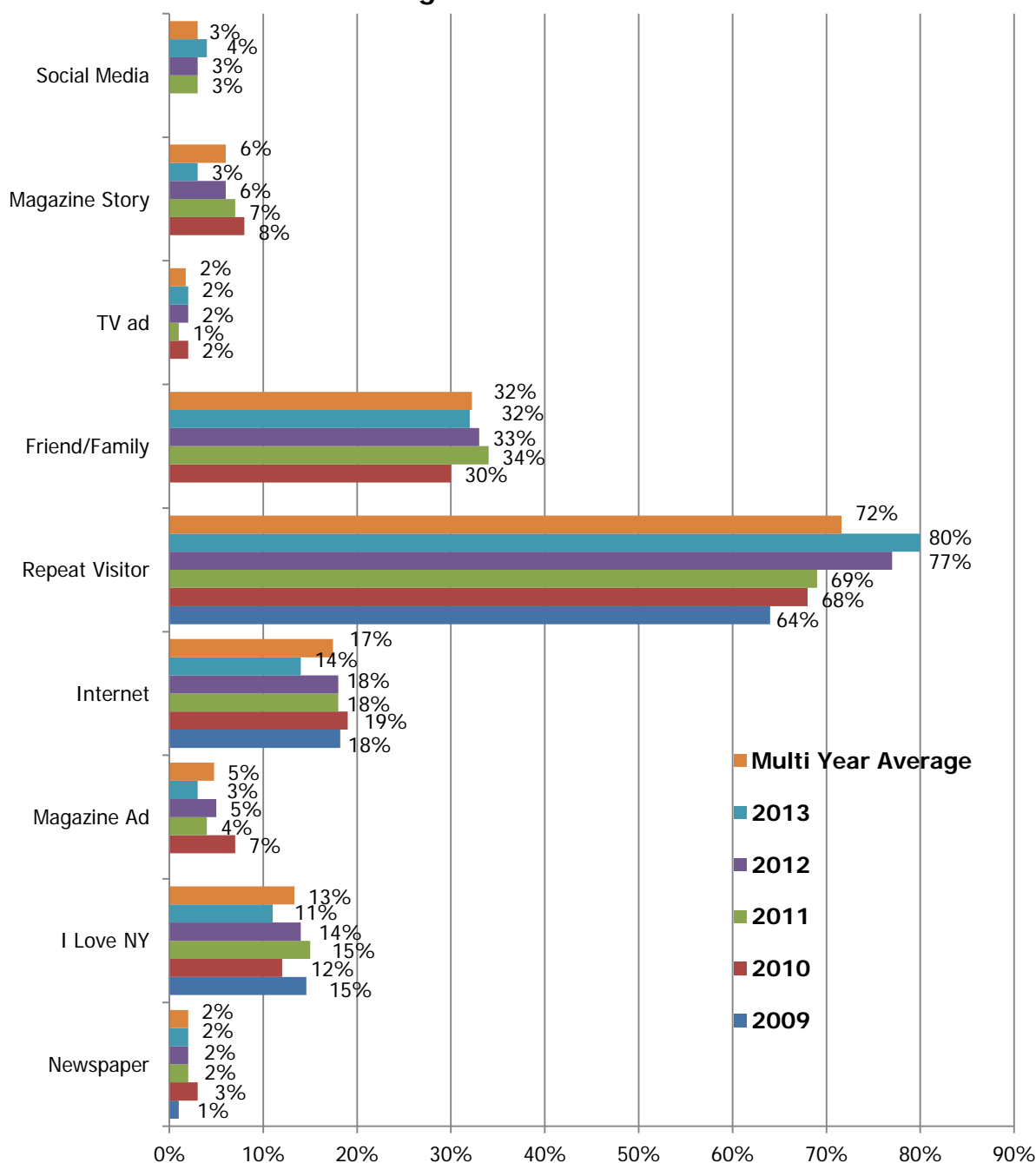


New York State (including the NY metro area) and eastern Canada, not surprisingly, continue to dominate the media market representation of survey respondents. Major northeastern metropolitan areas such as Newark, NJ, Philadelphia, PA, Hartford, CT, and Boston, MA comprise a secondary presence. This coincides with the slightly higher reported residences in the Northeastern U.S. states outside of New York State. 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 in 2013. The chart below illustrates the influencing factors for visitation during the past five years. Respondents were permitted to select multiple responses.

Figure 5. What Influenced Decision to Visit



Prior visitation, by a wide margin, continues to be the strongest influencing factor for trips to Essex County. Eight percent (80%) of respondents in 2013 reported that a previous visit inspired their return trip. This is the highest response in this category noted during the survey's ten-year duration.

The category of visiting a "friend or family" in the area 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 prior years.

Table 1 below summarizes the multi-year averages of these influencing factors.

Table 1. Multi-Year Average- Reported Factors Influencing Visit to Essex County

Social Media	Magazine Story	TV Ad	Friend/Family	Repeat Visitor	Internet	Magazine Ad	I Love NY	Newspaper
3%	6%	2%	32%	72%	17%	5%	13%	2%

These figures demonstrate the continued strength of prior visits as the primary reported influence on future visitation. Friend and family influence continues to be a strong secondary reported influence.

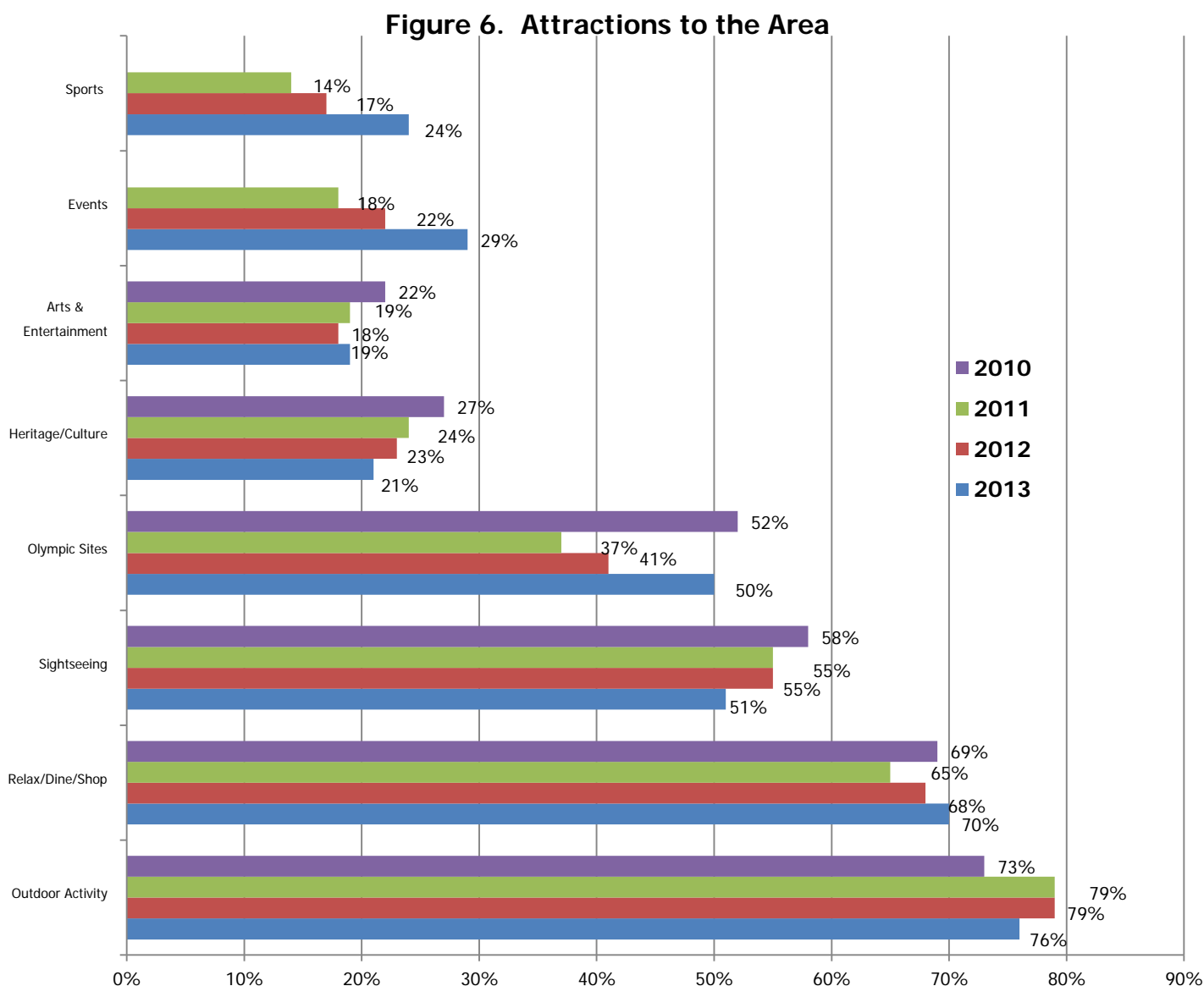
Social Media Respondents

Prior visitation was an even stronger reported influence among social media respondents. Eighty-six (86%) of social media respondents selected prior visitation as an influence in their decision to visit in 2013. Friend and family proximity was also a much more frequent response cited by this sub-group, at 44%. Not surprisingly, this group also reported the stronger influence (17%) of social media than among "all other" respondents.

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 2013, in comparison with responses from the prior several years. The “events” and “sports” categories were new to the survey in 2011 so have data only for three years.



Outdoor activities remained the largest draw to Essex County, although with a slightly less common response than found in the prior two years. Relaxing, dining and shopping remained the second-most frequently cited draw to visit the region. Olympic site visitation grew considerably in response frequency, and sightseeing dropped somewhat from the year prior. Reported attraction to the area by “sports” and “events” also grew notably in selection frequency.

Table 2 below provides multi-year averages of these attractions, by rates of selected responses.

Table 2. Multi-Year Average- Reported Attractions to Visit Essex County

Category	Average percentage of respondents selecting the attraction:
Outdoor activities	77%
Relax/dine/shop	68%
Sightseeing	55%
Olympic sites	45%
Heritage/culture	24%
Arts/entertainment	20%
Sports	18%
Events	23%

Within 2013 visitor data, “other” attraction responses which were frequently cited as attractions for visiting included; the Ironman or other sporting events, camping, and visiting family and friends. For a complete list refer to Appendix B (Open Ended Responses).

Social Media Respondents

This sub-group of respondents reported substantially higher levels of attraction to outdoor activities (87% vs. 76% all others) and “other” attractions (19% vs. 8% all others). Social media respondents also reported a slightly higher interest in heritage attractions (24% vs. 21% “all others”).

Social media respondents reported a notably lower overall interest in relaxing/dining/shopping (50% vs. 70% “all others”) and slightly lower interest in events (27% vs. 30% “all others”).

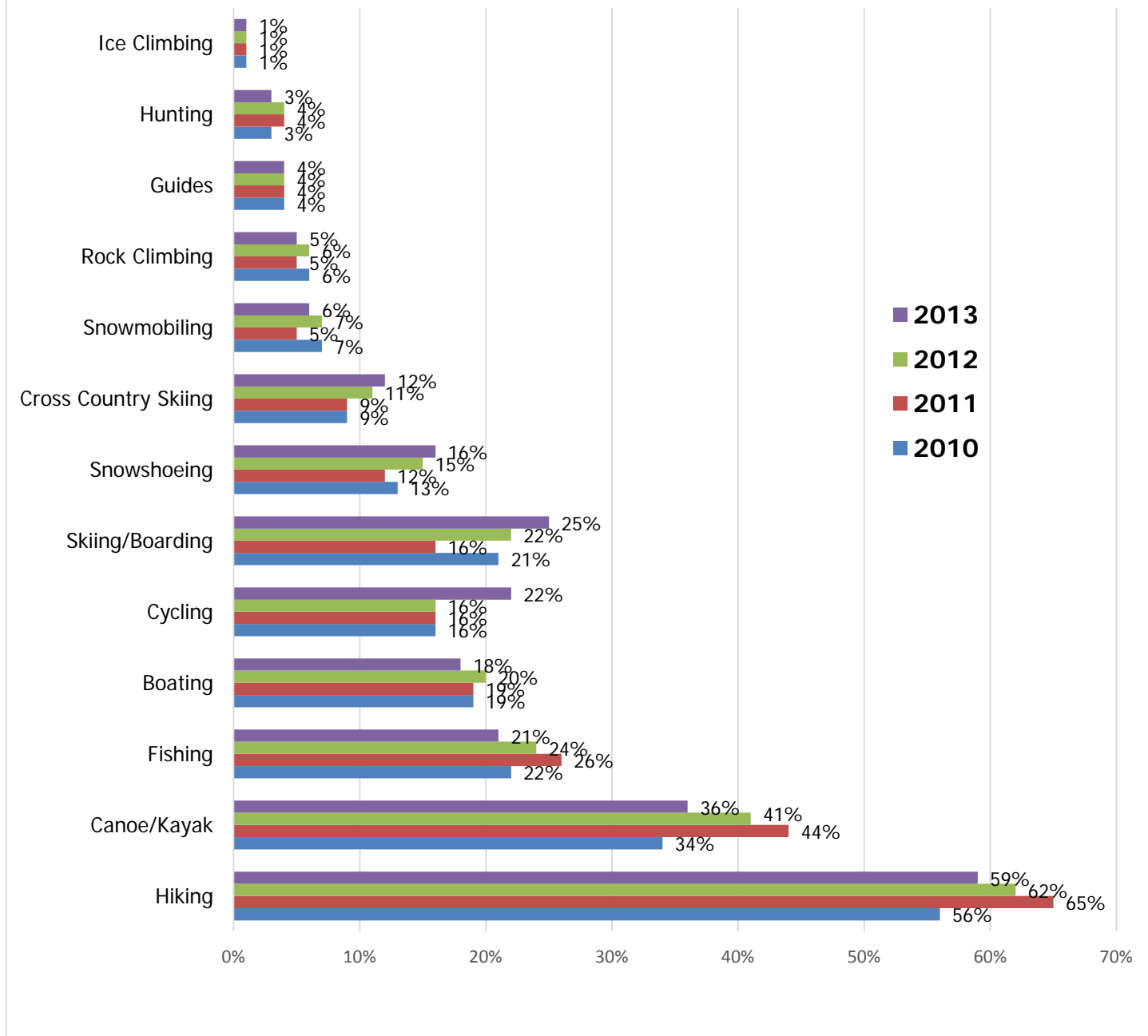
Adirondack Canoe Challenge

The survey added a new question, for exploratory purposes, in this year’s survey. It asked all respondents if they would be interested in an “Adirondack Canoe Challenge”, similar to the challenge that the “Adirondack 46” presented to hikers. Twenty-seven percent (27%) of respondents replied that they would be interested in such a canoe challenge. This figure jumped to 46% expressing at least some level of interest among social media respondents.

Outdoor Activities

Given the consistent popularity of outdoor activities as a draw to the region, a question was added to the survey in 2010 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. Figure 7 depicts the responses from visitors regarding the attraction of specific outdoor activities, for the last four years.

Figure 7. Outdoor Activities



Hiking continued to be the most popular reported outdoor activity among 2013 visitors, followed by 2) canoeing/kayaking, 3) skiing/boarding and 4) cycling. The latter two activities (skiing/boarding and cycling) showed notable gains in reported interest within this year's survey. Although they remain at the top of the list, reported interest in hiking and canoe/kayaking dropped slightly in comparison to last year data.

Among those who responded to the "other" category, the three most common responses included the Ironman or other athletic events, swimming, golfing, skating, and camping. The responses were particularly varied this year. See Appendix B (Open-Ended Responses) for a complete list.

Table 3. Multi-Year Average- Reported Outdoor Attractions

Category	Average percentage of respondents selecting the activity as an area of interest:
Hiking	61%
Canoe/kayaking	39%
Fishing	23%
Skiing/boarding	21%
Boating	19%
Cycling	18%
Snowshoeing	14%
Cross-country skiing	10%
Snowmobiling	6%
Rock climbing	6%
Guides	4%
Hunting	4%
Ice climbing	1%

Social Media Respondents

This sub-group of respondents were much more likely than "all other" respondents to select hiking, canoeing/kayaking, fishing, boating, snowshoeing, guided activities and cross-country skiing as outdoor activity draws. They were also notably *less likely* to select skiing and boarding and snowmobiling as activities of interest in 2013.

SUB-REGION VISITATION

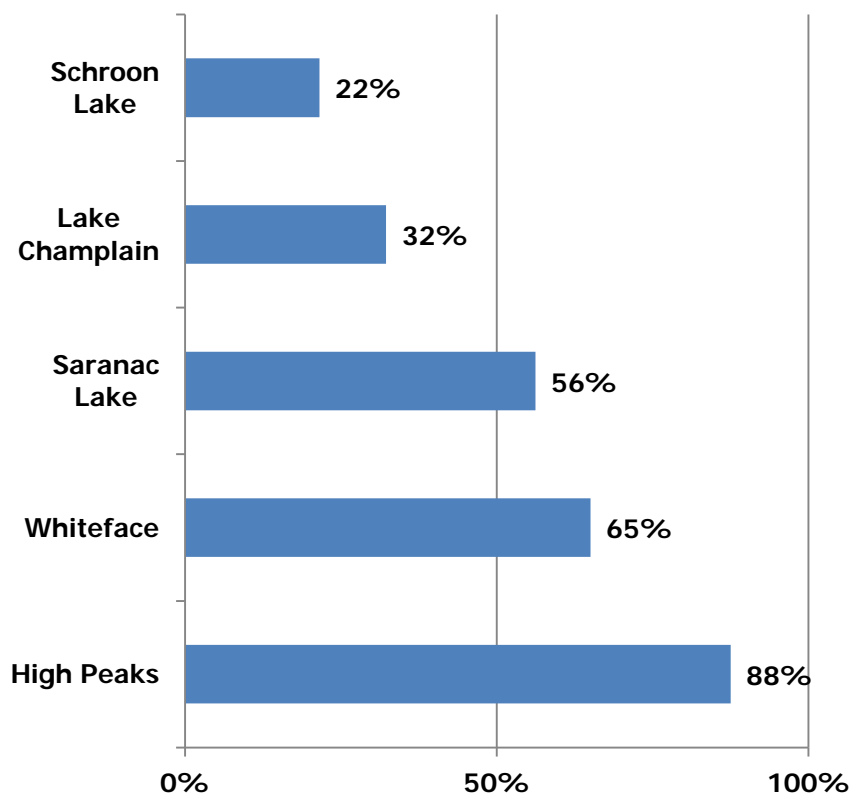
Essex County encompasses a large geographic region of approximately 1,900 square miles. Visitors were asked in the survey which regions within the county they had visited, or were most interested in visiting.

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 2013 respondents. Respondents were permitted to select multiple areas of interest.

Figure 8. Sub Region Visits or Areas of Interest



Interest in the High Peaks region continues to dominate visitor response. More than half of respondents continued to reported interest also in the Whiteface and Saranac Lake regions.

Approximately one-third of respondents stated that the Lake Champlain area was of interest and just under one-quarter expressed interest in the Schroon Lake area. These levels of interest sub-regionally are consistent with the prior year measurements, although those near the top of the list gained popularity, while those lower on the list dropped slightly in frequency of response.

Social Media Respondents

This group showed an even higher level of interest in the High Peaks region (93% vs. 88%) and in the Whiteface region (72% vs. 65%) than “all other” respondents. Social media respondents indicated slightly lower levels of interest in the Lake Champlain and Schroon Lake regions 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-four percent (94%) of respondents indicated that they found all of the information they were seeking from ROOST, with only 6% indicating some level of dissatisfaction in this area.

Table 4 below demonstrates a high level of overall satisfaction with travel-related information over the last five years.

Table 4. Five Year Average of Satisfaction with Travel Information Provided

	5-Year Average	2013	2012	2011	2010	2009
Satisfied with travel information provided	94%	94%	93%	93%	93%	95%

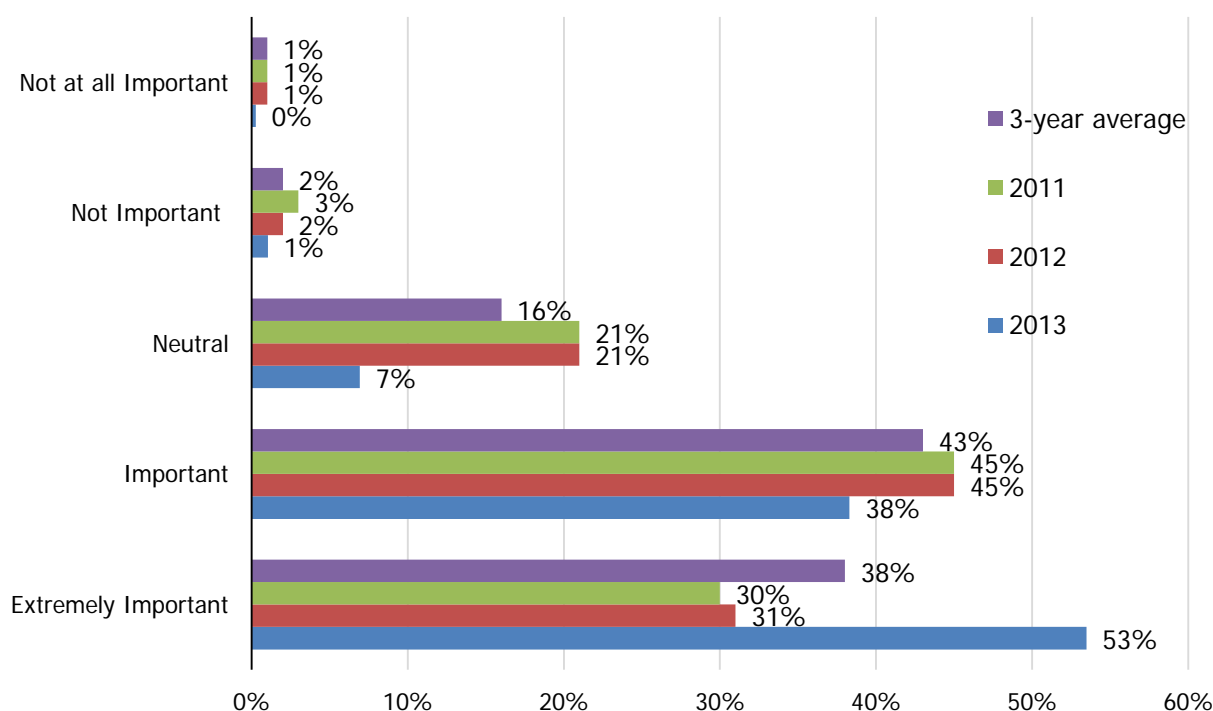
Social Media Respondents

This sub-group reported a just slightly higher level of satisfaction (95%) with travel information received, as among “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 and has begun implementing research to help track these trends. The survey asked travelers how important ecological or environmental sensitivity of their destination was to their travel planning. Figure 9 below depicts a break-down of these responses.

Figure 9. Importance of Ecological/Environmental Sensitivity



More than half of traveler respondents from 2013 reported that these considerations were “extremely important” to them. Over 90% of these visitors reported that these considerations were *either* “important” or “extremely important”. These are substantially higher proportions of responses than found in the prior several years, implying a growing concern regarding environmental sensitivities. It should be noted, however, that there was a high non-response rate to this question.

Social Media Respondents

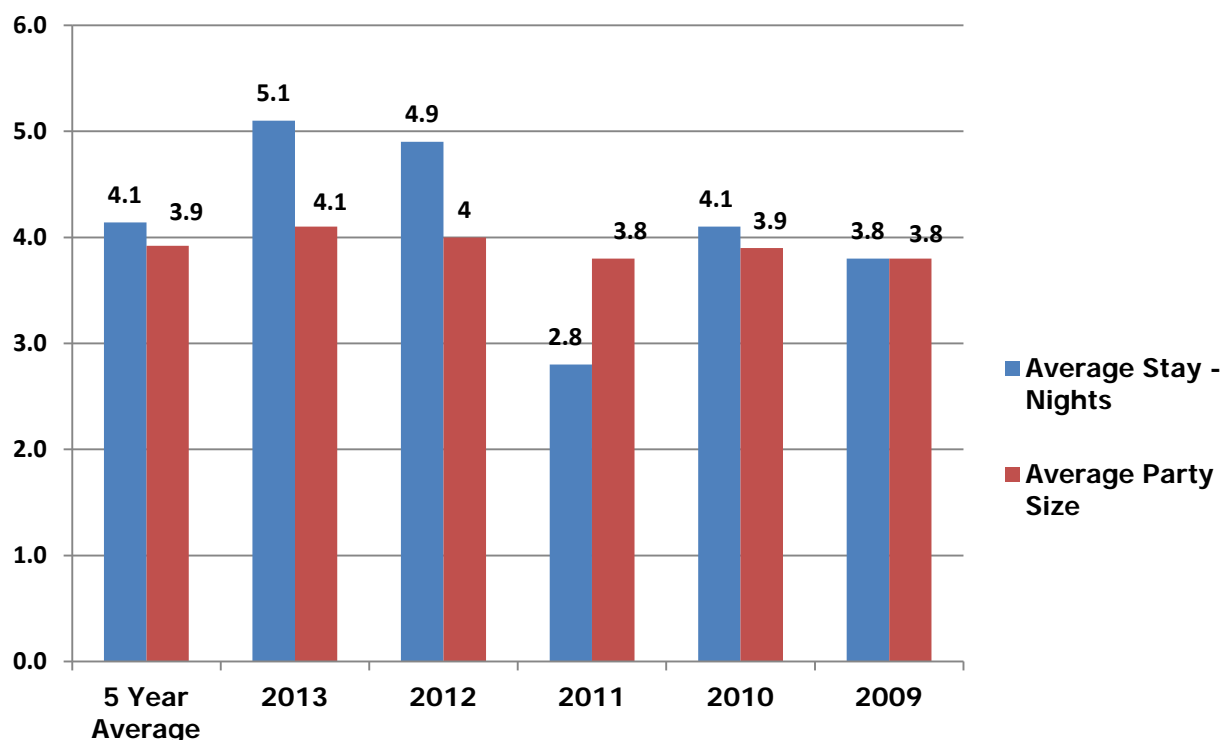
This group indicated that this issue was of even slightly higher importance (95% selected that it was either “extremely important” or “important” vs. 91%) than among “all other” respondents.

VISIT DURATION, PARTY SIZE AND SEASON OF VISIT

Visitor Duration and Party Size

Survey respondents were requested to report the length of their visit or visits to the region and the size and composition of their (average) visitor party. Figure 10 provides a summary of these two factors.

Figure 10. Average Stay Duration and Average Visitor Party Size



The average reported stay for 2013 visitors increased just slightly, from 4.9 to 5.1 nights. A daytrip is considered zero nights stayed. The shorter stays paralleling the difficult economic conditions from 2011 and earlier has ceased. It will be important to see if this trend continues longer term as it means substantial gains for regional tourism. These visits include multiple trips, in some cases, within 2013.

The mean reported visitor party size for 2013 was just over 4 persons, this also represents a slight gain from the prior two years. This includes an average of 3.4 adults (3.2 in 2012) and 0.73 children (same in 2012).

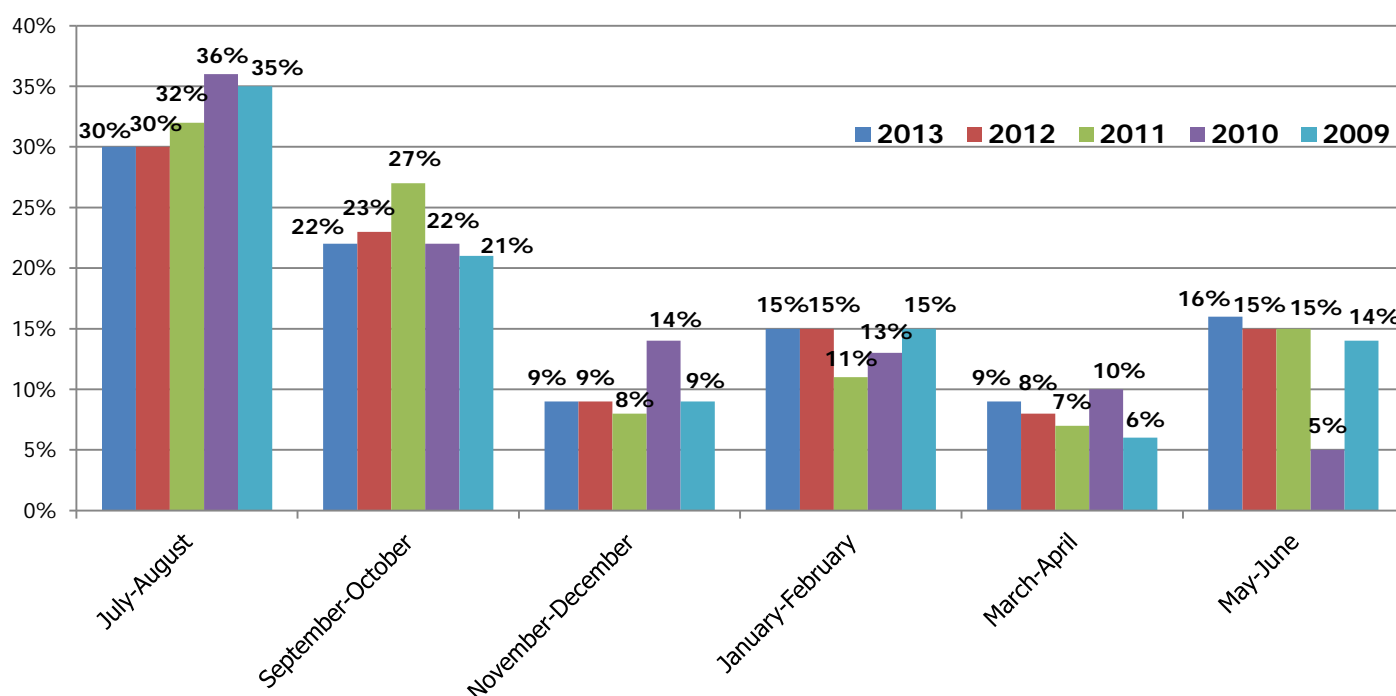
Social Media Respondents

The average duration of stay for social media respondents in 2013 was again slightly longer (5.6 nights) than the duration reported for “all other” respondents (5.1 nights). The average number of adults in this sub-group’s visitor party was consistent with “all other” (at 3.4), however the average number of children was higher (0.88 vs. 0.73).

Season of Visit

Survey respondents were asked about the timing of their visit(s) to the region during 2013. Figure 11 depicts these figures across the past five years. Multiple responses were permitted.

Figure 11. Time of Year Visited



While peak summer (July and August) remains the most commonly reported time for visitation, the proportion of visits during this time have declined. Also, while foliage season (September and October) remains the second-most commonly reported visited season, its reported popularity also declined during the past two years.

Mid-winter (January-February) visitation remained steady in comparison with the prior year. The “shoulder season” months of November/December and March/April and early summer (May/June) have remained consistent in reported visitation over the past several years. Table 5 below summarizes the four-year average of these visitation periods.

Table 5. Five Year Average of Time of Year Visited

Time of Visitation	Average of Selection Response Frequency
January-February	14%
March-April	8%
May-June	13%
July-August	33%
September-October	23%
November-December	10%

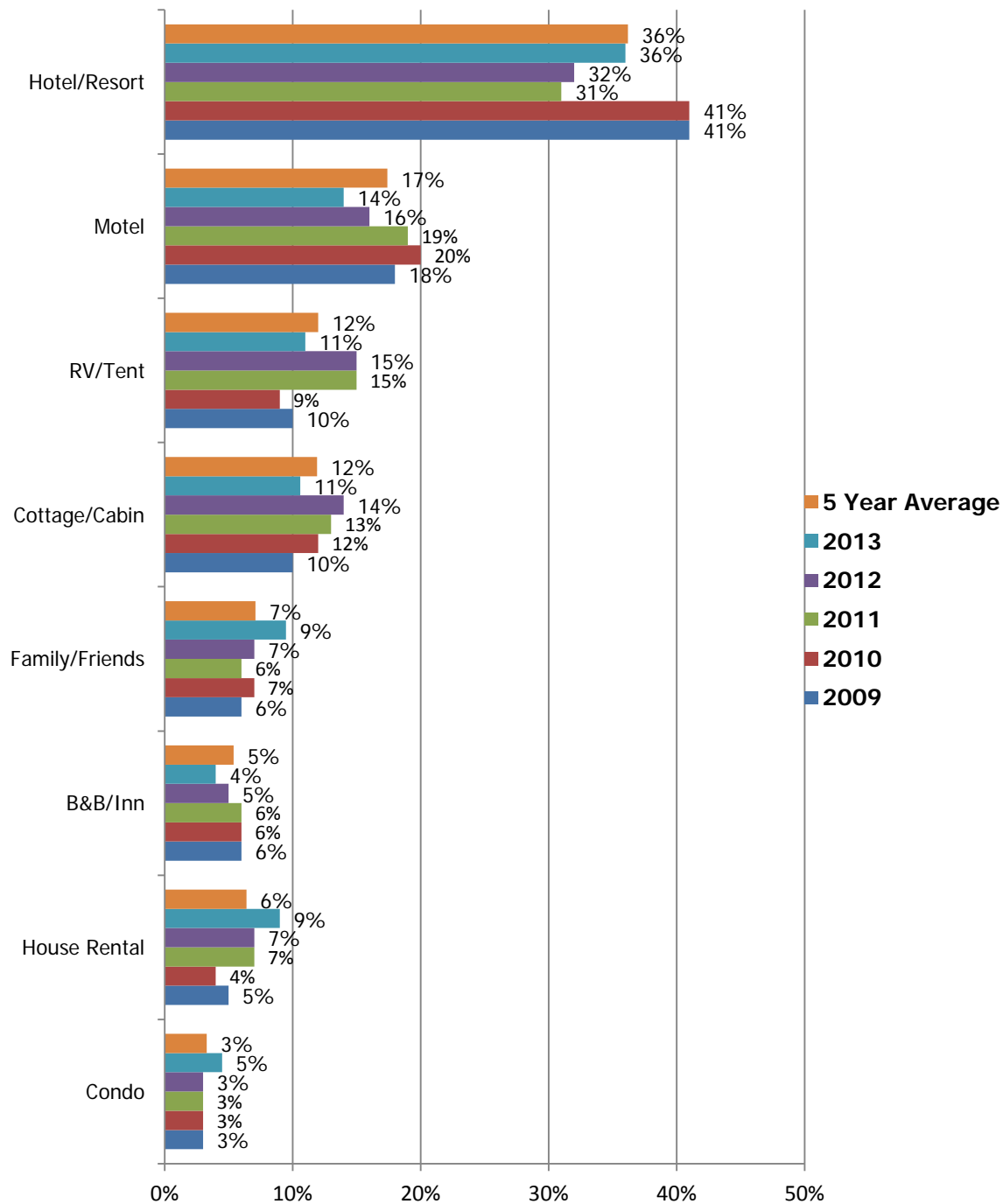
Social Media Respondents

Little substantial variation in reported timing or season of visitation was noted among social media respondents in comparison to “all other” respondent groups. Reported mid-winter (January/February) and shoulder season (March/April) travel was slightly higher than among “all other” respondents, while early summer (May/June) travel was reported as slightly lower.

LODGING SELECTIONS

Visitor respondents were asked what type of lodging they used during their stay in Essex County. Figure 12 depicts the lodging choices reported by visitors during the last five years.

Figure 12. Lodging Selections



Hotels remain, by far, the most popular lodging choice. Motels remained the second most common selection among all respondents by a narrow margin, dropping somewhat from recent years. Notably, the several year trend of increased camping and cabin stays dropped off among 2013 visitors.

Reported use of private house and condominium rentals increased among 2013 visitors. The proportion of visitors who reported staying with family or friends also increased slightly, presenting the highest proportion of responses in recent years. This is a statistic to watch as economic implications from such choices are important for occupancy tax and tourism dollars.

Social Media Respondents

This sub-group of respondents were much more likely to report staying with family and friends (14% vs. 9% among “all other” respondents). This means that nearly one out of seven of these social media respondents stayed with friends or family, which is a sizeable proportion of visitors who would not be providing occupancy tax dollars or income to the hospitality providers.

Interestingly, however, this group does not report lower lodging expenditures (see Leisure Visitor Spending section of report). In fact, these visitors report *higher* lodging expenditures overall. This finding would certainly ameliorate this concern.

Social media respondents were also *more likely* to report staying in a private house or bed and breakfast than “all other” respondents. As has been found in the last several years, they were also *less likely* to report staying in a motel.

LEISURE VISITOR SPENDING

Visitor respondents were asked to provide specific estimates of their daily spending in various categories during their 2013 trip to Lake Placid/Essex County. Total estimated leisure visitor expenditures reported *per visitor party per day* stayed very close to the same from the prior year. Average daily reported spending dropped slightly in the lodging category and rose slightly in the attractions/events category among all survey respondents.

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

Table 6. Essex County Mean Estimated Visitor Expenditures 2009-2013						
CATEGORY	2013 Mean Expenditure (Per Visitor Party)	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)	5 Year Average Mean Expenditure (Per Visitor Party per Day)
ATTRACTIONS & EVENTS	\$19	\$15	\$21	\$39	\$46	\$28
ENTERTAINMENT	\$14	\$14	\$21	\$35	\$46	\$26
TRANSPORTATION	\$37	\$37	\$37	\$43	\$41	\$39
LODGING	\$138	\$147	\$191	\$139	\$171	\$157
MEALS	\$69	\$68	\$103	\$70	\$80	\$78
SOUVENIRS/SHOPPING	\$34	\$34	\$55	\$49	\$54	\$45
ALL OTHER	\$12	\$11	\$25	\$56	\$82	\$37
AVERAGE DAILY EXPENDITURE	\$323	\$326	\$453	\$431	\$520	\$410

While the reported average daily estimated expenditures among 2013 visitors is lower than many years, as was also the case in 2012, overall average reported visitor spending (per trip) increased. As noted earlier in the report, visitors reported an average of more than five nights stayed in Essex County during 2013. This is the longest average duration of trips reported in recent years.

As such, overall estimated visitor spending in 2013 was actually *higher* than found in the previous year. Total estimated expenditures per visitor party respondent in 2012 were \$1,597. This was a substantial increase over a total of \$1,268 in 2011 per visitor party. This figure jumped to \$1,646 as the average total party reported expenditures in 2013. These data provide strong indications of a recovering tourism market in the region.

Social Media Respondents

Social media group respondents from 2013 reported even higher daily visitor spending than “all other” respondents. These visitors reported higher levels of spending across all categories, with the exception of attractions and events. Higher daily spending levels have been noted among social media respondents in three of the last four years.

An analysis of total spending indicates substantially higher overall expenditure level among the social media subgroup. Given the slightly longer average reported stay (5.6 nights vs. 5 nights of “all others”), the total estimated spending per visit among social media groups was \$1,903 (compared to \$1,620 among “all others”). It should be noted that this level of estimated total spending per visitor party is the highest ever reported within this visitor survey.

Table 7. Social Media vs. “All Other” Respondent Expenditures per Visitor Party per Day

Expenses/per Party per Day for 2013	Social Media Respondents	“All Other” Respondents
Lodging	\$772	\$697
Meals	\$432	\$344
Shopping	\$213	\$171
Entertainment	\$84	\$68
Attractions/Events	\$97	\$97
Transportation	\$242	\$185
Other	\$63	\$58
Total expenditures	\$1,903	\$1,620
Average visit duration	5.6 nights	5 nights
Total expenditure per day	\$340	\$324

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 method 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 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-one percent (81%) 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. This has ranged from 79% to 85% over the last five years. 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 eleven percent (11%). 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

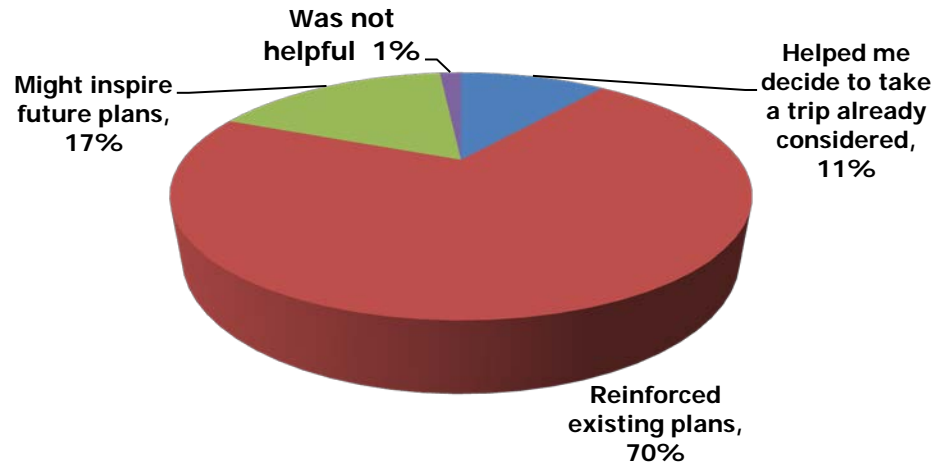
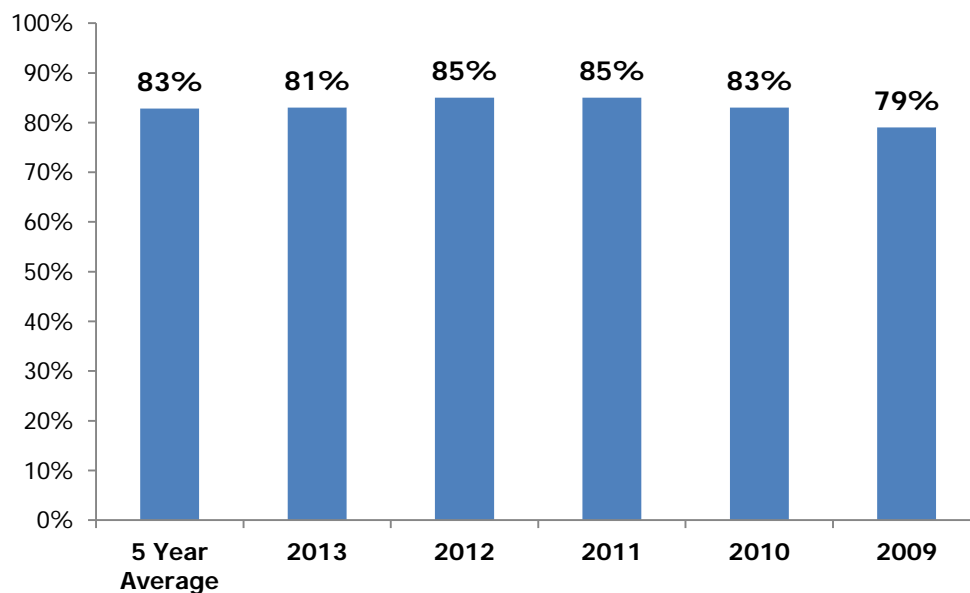


Figure 15 below depicts the gross conversion rates for the last five years. This demonstrates the percentage of visitors who have been positively influenced to travel to the area as a result of information received from ROOST or from their contact with its offices. These figures have remained fairly consistent across the last decade of this research.

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



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 2013 estimated visitor count is tabulated by multiplying the number of leads generated by ROOST (those who contacted their office during 2013 for information) by the conversion factor and by the average party size (determined by this survey).

$$133,078 \text{ (direct leads)} \times 81\% \text{ (gross conversion factor)} \times 4.1 \text{ (average party size)}$$

$$441,952 = \text{estimated visitors in 2013}$$

The number of visitors likely influenced by ROOST to visit the region in 2013 is estimated at 441,952. This represents a dramatic 29% increase of estimated visitation from the prior year and a record number of visitors within the last decade of this research.

In 2013, Essex County spent \$1,903,013 of occupancy tax dollars for tourism marketing purposes. This yields a \$4.31 marketing cost per visitor based on occupancy tax expenditures (\$1,903,013/441,952). This is a comparably low figure showing not only high levels of visitation, but significant efficiencies in reaching these 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 traceable inquiries by the average gross conversion rate, daily visitor expenditures and length of stay:

$$133,078 \text{ (number of direct, traceable inquiries)} \times 81\% \text{ (gross conversion factor)} \\ \times \$323 \text{ (mean visitor party expenditure per day)} \times 5.1 \text{ (mean length of stay in nights)}$$

$$= \$177,567,705 \text{ (total estimated revenue generated by visitors in 2013)}$$

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

$$\$177,567,705 \text{ (total estimated visitor revenue)} / \$1,903,013 \text{ (total marketing expenditures spent through occupancy tax dollars)}$$

Return on Investment (ROI) = 93:1

The above calculations show that the total estimated revenue generated by visitors was over \$177 million in 2013. This produces an estimated ROI of \$93 in leisure visitor-related revenue for each occupancy tax dollar expenditure. This figure presents a high return in comparison with recent years.

Table 8 below depicts returns on investment during the past five years.

Table 8. Five Year Average Occupancy Tax Return on Investment

	5 Year Average	2013	2012	2011	2010	2009
Five- Year Essex County Occupancy Tax ROI	84:1	93:1	82:1	89:1	65:1	89:1

The “Key Facts Derived from Survey Data” table on the following page provides estimated returns based on several budgetary breakdowns, including not only occupancy tax expenditures, but total bureau budget and regional cooperative investments. This figure demonstrates a higher return on investment (ROI) than found in recent years and a high level of implied efficiencies achieved by ROOST efforts during 2013.

Return on Investment for visitor spending in Essex County has continued to rebound significantly from 2010 when marketing expenditures (such as state matching funds) were removed. These figures provide highly positive indicators of an improved market and demonstrated high returns on the dollars spent to reach leisure visitors to Essex County in 2013.

KEY FACTS DERIVED FROM SURVEY DATA

	5 Year Average	2013	2012	2011	2010	2009
Number of Completed Survey Respondents	2,271	2,943	4,037	1502	1,348	1,526
Average Income of Respondents	\$95,943	\$105,550	\$98,456	\$102,500	\$80,000	\$93,211
Mean Age of Respondents	51	53	51	49	52	50
Direct Inquiries to Essex County via the Bureau	96,864	133,078	101,998	104,886	60,604	83,753
Average Night Stays/ Party	4.1 Nights	5.1 Nights	4.9 Nights	2.8 Nights	4.1 Nights	3.8 Nights
Overnight Visitor Stays	1,328,278	2,253,955	1,678,044	948,590	805,379	955,423
Average Party Size	3.9 Persons	4.1 Persons	4.0 Persons	3.8 Persons	3.9 Persons	3.8 Persons
Conversion Factor Rate	83%	81%	85%	85%	83%	79%
Average Daily Expenditure per Party	\$410	\$323	\$326	\$453	\$431	\$519
Total Leisure Visitor Expenditures	\$130,535,037	\$177,567,705	\$138,491,900	\$117,120,427	\$89,004,798	\$130,490,357
Essex County Occupancy Tax and Matching Funds	NA	NA	\$1,737,496	\$1,386,583	NA	\$1,563,032
Occupancy Tax and Matching Funds ROI	NA	NA	80:1	84:1	NA	83:1
Essex County Occupancy Tax	\$1,549,078	\$1,903,013	\$1,694,051	\$1,318,029	\$1,364,634	\$1,465,665
Essex County Occupancy Tax ROI	84:1	93:1	82:1	89:1	65:1	89:1
Total Bureau Budget	\$1,963,761	\$2,251,729	\$2,042,001	\$1,668,742	\$1,941,061	\$1,915,274
Total Bureau Budget ROI	66:1	79:1	68:1	70:1	46:1	68:1
Total Budget & Regional Co-op*	\$2,710,249	\$2,978,770	\$2,884,941	\$2,262,649	NA	\$2,714,634
Total Budget & Regional Co-op ROI	52:1	60:1	48:1	52:1	NA	48:1

* 4-year average

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, Bureau of Economic Analysis. "Travel and Tourism Spending Accelerated in 2013". March 20, 2014.
3. U.S. Department of Commerce, International Trade Administration- National Travel and Tourism Office. "U.S Commerce Department Forecasts Continued Strong Growth for International Travel to the United States 2014-2018".

APPENDICES

**APPENDIX A: FULL DATA SET FOR COMPARISON OF SOCIAL MEDIA
RESPONDENTS vs. "ALL OTHER" RESPONDENTS**

Question/Response	Total	Social Media	All Other
Did you travel in 2013?	2943 Respondents	241 respondents	2702 respondents
Yes	90%	90%	90%
No	10%	10%	10%
How many in your travel party?			
Adults	3.4	3.4	3.4
Children	0.73	0.88	0.72
How many nights did you stay?	5.1	5.6	5
How many leisure trips here in 2013?	1935 Respondents	178 Respondents	1756 Respondents
1	45%	48%	49%
2	29%	23%	29%
3 or more	27%	29%	26%
Expenses/Per Day			
Lodging	\$704	\$772	\$697
Meals	\$352	\$432	\$344
Shopping	\$175	\$213	\$171
Entertainment	\$70	\$84	\$68
Attractions/Events	\$97	\$97	\$97
Transportation	\$190	\$242	\$185
Other	\$58	\$63	\$58
Total Trip	\$ 1,646.00	\$1,903	\$1,620
Total per day	\$323	\$340	\$324
Interest in canoe/kayak challenge	2879 Respondents	236 Respondents	2642 Respondents
No	73%	54%	74%
Yes	27%	46%	26%
Lodging choices	2445 Responses	231 Responses	2214 Responses
Hotel	31%	31%	37%
Motel	13%	11%	15%
Cabin/cottage	4%	5%	4%
RV/tent	4%	6%	4%

**APPENDIX A: FULL DATA SET FOR COMPARISON OF SOCIAL MEDIA
RESPONDENTS vs. "ALL OTHER" RESPONDENTS**

Family/friends	9%	14%	10%
Private	8%	12%	8%
B&B/Inn	8%	13%	9%
Condo	10%	9%	12%
Time of Year Visited	3534 responses	335 responses	3199 responses
July-August	30%	29%	30%
September-October	22%	21%	22%
November-December	9%	9%	9%
January-February	15%	17%	15%
March-April	9%	11%	9%
May-June	16%	14%	16%
Why did you visit?	2878 respondents	236 Respondents	2643 Respondents
Been before	80%	86%	80%
I Love NY guide	11%	9%	12%
Friend/family	32%	44%	31%
Internet	14%	15%	14%
Magazine ad	3%	2%	3%
Newspaper ad	2%	1%	2%
TV ad	2%	1%	2%
Magazine story	4%	4%	4%
Social Media	4%	17%	3%
other	23%	22%	22%
Area of interest	2878 respondents	236 Respondents	2643 Respondents
High Peaks	88%	93%	87%
Whiteface	65%	72%	64%
Lake Champlain	32%	28%	33%
Schroon Lake	22%	18%	22%
Saranac Lake	56%	58%	56%
Other	10%	8%	10%
What attracted you to the area?	2878 respondents	236 Respondents	2643 Respondents
Outdoor activity	76%	87%	75%
Arts & Entertainment	19%	20%	19%
Heritage	21%	24%	20%
Olympic sites	50%	58%	49%

**APPENDIX A: FULL DATA SET FOR COMPARISON OF SOCIAL MEDIA
RESPONDENTS vs. "ALL OTHER" RESPONDENTS**

Events	30%	27%	29%
Sightseeing	51%	51%	51%
Sports	24%	25%	51%
Relaxing	70%	50%	70%
Other	8%	19%	8%
What outdoor activity attracted you to the area?	2878 Respondents	236 Respondents	2643 Respondents
Hiking	59%	78%	57%
Cycling	22%	22%	22%
Canoe/Kayak	36%	49%	35%
Guides	4%	8%	3%
Fishing	21%	29%	20%
Boating	18%	25%	17%
Hunting	3%	4%	2%
Rock climbing	5%	7%	4%
Skiing/Boarding	25%	7%	25%
Cross Country Skiing	12%	18%	11%
Snowshoeing	16%	28%	15%
Ice climbing	1%	3%	1%
Snowmobiling	6%	3%	6%
Other	12%	11%	12%
How important was ecological/environmental sensitivity in your travel destination?	1935 responses	178 Responses	1754 Responses
Extremely important	53%	62%	53%
Important	38%	33%	39%
Neutral	7%	5%	7%
Not important	1%	0%	1%
Not at all important	0%	0%	0%
No answer			
Did you find all the information you were looking for?	2878 respondents	236 Respondents	2642 Respondents
Yes	94%	95%	94%
No	6%	5%	6%

**APPENDIX A: FULL DATA SET FOR COMPARISON OF SOCIAL MEDIA
RESPONDENTS vs. "ALL OTHER" RESPONDENTS**

Level of influence of information	2871 respondents	235 Respondents	2635 Respondents
Helped me decide to take a trip I had not previously planned	11%	13%	11%
Reinforced existing plans to visit region	70%	74%	70%
Might inspire a trip at some other time	17%	12%	18%
Helped me decide not to visit region	0%	0%	0
Was not helpful	2%	1%	2%
Had you visited region before	2878 respondents	236 Respondents	2642 Respondents
Yes	88%	93%	87%
No	12%	7%	13%
Median Age	54	47	55
Mean Age	53	46	54
Median Annual Household Income	\$ 100,000	\$ 100,000	\$ 100,000
Mean Annual Household Income	105,550	\$95,393	106,579

APPENDIX B: OPEN ENDED RESPONSES- WHAT ATTRACTED YOU TO VISIT?

	IRONMAN	
Ironman	Celebrating a 46R completion!	
Honey mooning	Visit friends.	
Honey mooning	golf	
Ironman triathlon	Wild Center, Whiteface	
Ironman	visiting with friends	
Ironman	State parks	
Camping	State parks	
cycling & golf	the wild center, pub and brewery	
Wine Tours	wedding	
Northwood School	Wild Center Museum	
Santa Claus Village & High Falls Gorge	snowmobiling	
skiing	bobsled exp	
triathlon	Breweries	
Ironman	primitive and car camping	
MOTORCYCLING	Camping	
snowmobiling	Ironman	
Church	xcountry skiing	
Outstanding Restaurants	xcountry skiing	
photography	museums	
winter weekend festival	Motorcycle Touring	
Ironman	Ironman	
bbq fest, winter carnival	Skiing	
Skiing	Can Am Hockey	
golf	Museums	
camping	visit friends	
Horse back riding at mount vanhoughtsburg	visiting family	
Casino	snowmobiling	
Family Reunion	visiting family	
Horse show	Ironman	
Great Adirondack Brewing Co.	P Smiths College	
golf	visiting family	
Ironman!	The family has been vacationing in	LP since 1900
Ice-Skating	photo-ops	
ironman	Hockey tournaments	
Historical sites	visual beauty and clean air	
work	the Landscape of the area	
IronMan Triathlon	Golf	
Miss seeing snow	beach on lake, family time	
Mountain Lake Academy	motorcycling	
ironman	Great drives	
Snowshoeing	camping	
camping	Ironman Lake Placid	
Hunting	fresh clean air	

Ironman	camping	
motorcycling	Hunting	
HELP FRIENDS LOOK FOR REALESTSTE.	Six Flags	
Love Cafe Rustica	Ironman	
sleigh riding for 3 1/2 yr old granddaughter.	camping w/travel trailer	
triathalon	motorcycle riding	
Time of year for the changing of the colors	research for writing	
Photography	Camping	
Love Cafe Rustica	Photography	
The beauty of the area	skating competition	
Just being there..	golf	
writing workshop	snow shoeing	
visiting hometown/family	golf	
LOVE driving from Buffalo to the ADK. Especially from Tupper to Lake Placid with the music cranked! You feel like a million bucks.	skiing	
ice hockey camp. Can/Am	Loppet	
Triathlon; golf	camping	
Ironman	photography	
natural beauty	camping	
backpacking	snowmobiling	
boating	just enjoying the colors in the fall	
GOLF	Golf	
love the lakes	just being excited with the awesome views	
Lodging	Exploring the mountain back roads	
Hunting	Boating	
friends	work	
Winter activities	camping	
golfing	Museums	
Ironman	Wedding	
shopping	Ironman	
swimming in Mirror Lake	conference	
Ironman	Marathon	
Golf	golf	
Camping	weddding	
school	GOLF	
Memories	Motorcycle touring	
motorcycle touring	Ironman	
Touring on motorcycles	Snowmobiling	
MAPLE SYRUP	Hiking! This place is awesome	
bpating ,visiting friends	motorcycling	
swimming	museums	
Lake Placid Marathon	house hunting	
Leaf looking in Autumn..... What beauty	ironman	
camp redwing	ironman	
BIRTHDAY	biking	
camping	biking	
	stays natural not all the stores like at home. unique frie	

change it	sightseeing	
Motorcycle riding	sightseeing	
Ironman	Ice Climbing!	
beach	figure skating	
bead store	Ironman	
Campgrounb	iron man	
snowmobiling	Golf	
photographing	College Student	
climbing	Ironman	
Ironman and training camp	Stayed at a working dairy farm that made cheeses	
I miss Stars on Ice over Thanksgiving!	canoe	
Ironman competition	Ironman Lake Placid and 46'ers hiking	
Word of Life Camps	golf	
iron man, uj arts center, jems		
Hotel conference		
wineries		
golf		
romantic getaway		
romantic getaway		
visiting our daughter		
Golf		
Iron Man		
camping		
visiting family		
motorcycle riding		
IMLP		
Ironman		
camping		
Saranac Lake Festivals		
GOLF!		
Playing in lake with grand kids		
Motorcycling		
the lake		
touring schools		
Fall Foilage		
golf		
Texas Holdem Poker, Chess		
Camping		
camping		
Business		
Events at Paul Smiths		
camping		
camping		
Camping		
Boating		
breweries		

WHAT OUTDOOR ATTRACTIONS DREW YOUR YOU TO VISIT?

Golf	camping	
running swimming	shoping	
scenic drives	lake activites	
Triathlons	camping; picnicking; backpacking	
camping	Dogs snow sled	
Triathlon Training	iron man	
Trail Running	Swimming	
Skating	Camping	
skating at the oval	Ice Hockey tournaments and camps	
running / swimming	Camping, backpacking	
It's beauty	Golfing	
tennis, golf, swimming	Golfing	
Golf	Camping	
Skating	Triathlon	
Golfing	Ironman	
photography	Ironman	
ice skating	Skating	
Triathlon	golfing	
golfing	white water rafting	
Golf	Skating	
Horse back riding	Ironman	
swimming	ice skating	
Horse back riding	sking	
Tennis, swimming	triathlon	
Fall Foliage	ice skating	
camping and golf	watching wild life LOONS	
Ironman	Ironman training	
mountain biking	Motorcycle Touring	
Swimming	Golf	
Horse back riding	adk!	
Cliff jumping	Race	
golfing	Ironman	
Walking, yoga	golf golf golf	
Mountain climbing	Ironman	
swimming	dog sled	
Skeleton	Swimmimg	
swimming, road biking	Camping	
Ski racing	shopping	
Ice-skating	Golf	
Ironman Triathlon	Sight Seeing	
tobaggan	motorcycling	
swimming, running	Flying	
relaxing on a lake's shore, changing leaves	triathlon	

Sailing	Horseback Riding	
Saranac Ice Castle	sight seeing	
Speed skating on the Oval	CAR TRIPS IN BEAUTIFUL AREAS	
running	all terrain vehicle	
golf	various triathalons	
lacrosse	Shopping	
skating	Camping	
Swimming	Walking around the area	
Mt Biking	Bushwhacking	
Camping	swimming, running	
camping	golf	
rugby	camping	
Off road riding	Love the Minature Golf Course...for adults and kids. Also	
golf	triathlon	
relaxing by the lake	skating, dog sled rides	
Camping	tail of the pup eating	
Ironman	fishing, antiqueing	
Swimming, Running	mountain biking	
golf	running, swimming	
swimming and running	running	
whitewater rafting	swimming	
ice skating	Motorcycling	
golf	Swimming, hockey games	
speedskating/figure skating	golf	
Relaxing by Mirror Lake	Running and swimming	
Golf	Tubing	
Motorcycling which is often missed	Golf	
Ironman	ice skating, tobaggon, dog sled rides	
bobsledding/skeleton	Running, swimming in the lake	
Ice skating on the oval!	walking	
exploring	Backpacking	
swimming, sailing	ice skating and pond hockey	
running	Golf. Motorcycle Event(s)	
rafting	Lacrosse	
swimming	bobsled	
camping	swimming, running	
Sunning near lakes.	Camping	
olympic sports	Photography	
camping	Golf	
Golf	Camping	
Ironman	motorcycle touring	
Ice Skating	triathlon	
Motorcycle riding	Golf	
triathalon	sledding	
sound of loons,birds,solitude	Swimming in Mirror Lake	
luge	skating on mirror lake	

of Course... the Winter Carnavel- Community Sprit	swimming and horseback riding	
camping	Mirror Lake Toboggan	
Ironman	Sightseeing	
Swimming in Mirror Lake	ironman	
visit Olympic venues	birding	
Camping	bob sled track	
CAMPING	camping	
speedskating	Back country skiing	
golf	tennis, golf	
camping	ice skating	
ice skating	bobsledding, skeleton, skating	
Running, swimming	Ice skating	
Golf	Walking	
Motorcycling	bobsled	
skijoring	Ironman	
Ironman	Rugby	
golf	GOLF	
just getting away	Swimming	
camping W/ travel trailer	Ice skating	
Swimming	Horseback riding	
Camping, sports events	running and swimming	
photography	Ironman	
Camping, sports events	ice skating	
Beaches	snowboarding/skating	
Camping	Figure skating, lake placid	
Motorcycling	Lumberjack	
golf	bobsled	
golf	running..beautiful scenery	
bobsled, biathlon	Trail running	
Lake Placid Ironman Triathlon	Ironman LP	
Camping	horse & sleigh	
golf	ice skating	
Camping	swimming and running	
Swimming	Swimming	
Sleigh rides	Rugby	
white water rafting	swimming	
walking with dog	camping	
walking with dog	the scenery	
ice fishing, winter activites	photograpy	
camping	camping	
Bobsled	Swimming running	
skating	running	
skating	biathlon	
camping	camping	
Lake swimming	Golf	
ice skateing	swimming in mirror lake	

speed skating	golf	
triathlon, marathon	golf	
Sight seeing	Ironman	
golf	Rugby	
Ironman	golf	
bobsledding, ice skating and swimming	motorcycle	
swimming, running	Mt. Biking	
ice skating	Triathlon training possibilities	
olympic attractions at park	running	
running	tennis	
relaxing in a beautiful part of our country	Camping, swimming	
Motorcycle Riding	backpacking	
Ice Skating, Bobsled, Skeleton	Photography	
swimming	Camping	
ski-ing, golf	Triathlon	
golfing	Bobsled	
motocycle	Camping	
Camping	camping	
swimming	camping	
Golf	ice skating	
Dogsledding	golf	
Olympic activities (ice-skating, bobsled, luge)	tobaganning & tubing	
Wolf walk. Wildlife refuge	camping	
Horseback riding, Fruit picking	Roller Blading/Ice Skating	
Golf	Luge/Bob Sled/Marathon	
Triathlon	camping	
camping	relaxing	
geocaching	dog sledding	
Swimming in Mirror Lake	mountain biking	
Hockey	swimming in Mirror Lake	
Horseback riding	Swimming	
camping	Ironman Lake Placid for the event and training	
Golfing	Camping	
sitting outside enjoying views	Ironman triathlon	
Walking r	White water Rafting	
Running	Running, ice skating	
Swimming	Running	
Golfing	golf	
GOLF	Camping	
Ice skating		
speed skating		
Hockey/skating		
water bikes		
horseback riding		
Motorcycling		
golf		

APPENDIX C: 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](#)

1. Please tell us, did you travel in 2013?

☐ yes

☐ no

[Continue](#)

2. How many leisure travel visits did you make to the Lake Placid/Essex County region in 2013?

- ☐ 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.

- | | |
|---|---|
| <input type="checkbox"/> Been Before | <input type="checkbox"/> I Love NY Travel Guide |
| <input type="checkbox"/> Friend or Family | <input type="checkbox"/> Website |
| <input type="checkbox"/> Magazine Advertisement | <input type="checkbox"/> Newspaper |
| <input type="checkbox"/> TV Advertisement | <input type="checkbox"/> Magazine Article |
| <input type="checkbox"/> Facebook or other social media | |
| <input type="checkbox"/> Other influence: | <input type="text"/> |

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:

Continue

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:

Continue

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:

Continue

9. Would you be interested in a canoe/kayak challenge, similar to the 46er hiking challenge?

- ☐ Yes
- ☐ No

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. On your visit in 2013, how many people were in your party for your trip to Lake Placid/Essex County?

Number of Adults

Number of Children

Continue

14. 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

Continue

15. Please indicate the total length of time you spent in the region in 2013?

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

Continue

16. 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

Continue

17. 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 \$

Continue

18. How important to you, as a visitor, are environmental issues in the Adirondacks?

- ☐ Extremely important
- ☐ Important
- ☐ Neither Important nor Unimportant
- ☐ Unimportant
- ☐ Extremely Unimportant

Continue

19. Please select any of the environmental issues below of which you are aware:

- ☐ Water quality
- ☐ Aquatic invasive plants (such as Eurasian watermilfoil)
- ☐ Invasive insects (such as Emerald ash borer)
- ☐ Aquatic invasive insects (such as Asian clam)
- ☐ Terrestrial invasive plants (such as Japanese knotweed)
- ☐ Climate change-related stress on fish and wildlife
- ☐ Forest fragmentation
- ☐ Trail erosion
- ☐ Land or water overuse

Continue

20. What is the annual income of your household?

- | | |
|--|--|
| <input type="radio"/> Less than \$30,000 | <input type="radio"/> \$80,000 to \$124,999 |
| <input type="radio"/> \$30,000 to \$59,999 | <input type="radio"/> \$125,000 to \$200,000 |
| <input type="radio"/> \$60,000 to \$79,999 | <input type="radio"/> over \$200,000 |

Continue

21. Please tell us your Zip/Postal Code:

Continue

22. Please tell us your birthyear:

Continue

23. Contest winners will be contacted by email.

Please provide your email address:

Finished