

# Comprehensive Destination Research and Strategic Review

Travel Market Analysis  
Visitor Research & Strategic Direction

**Study Period:**  
May - October 2016

It's the work we do before we do the work!



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# 1. Executive Summary



## WHY IS TOURISM IMPORTANT TO WARREN COUNTY?

Tourism offers the most viable opportunity to diversity and ignite Warren County's economy by capitalizing on existing demand – and increasing demand – for your natural, cultural, and recreational assets, in turn attracting private investment that will transform communities.

Tourism is already a \$1.3 billion industry in the Adirondacks, with Visitor Spend at \$570,886,400 in Warren County alone. In 2015, tourism provided direct employment for over 6,400 people in the county and indirect and induced employment for another 2,700 people; created \$40,189,000 in local tax revenue and \$31,660,000 in sales tax; and provided \$274,985,000 in labor income.

In 2015, your visitors spent over \$235 million on lodging, over \$13 million on recreation, over \$131 million on food and beverage, over \$105 million at retail shops and service stations, over \$16 million on transportation, and over \$67 million on second homes.

Tourism as an industry creates more jobs, drives more revenue, and employs more people in Warren County than in any of the other Adirondack counties (Essex, Franklin, Hamilton, Lewis, or Clinton).

With its comparatively low upfront investment cost and quicker return on investment than many other industries, tourism is well positioned to drive the Warren County economy as well as complement other strategic clusters of economic activity. An expanded tourism season leading to year-round tourism will help promote a more sustainable, stable economy and more jobs; it's the most likely to power growth for the county and help attract other types of investment.

Warren County has a long, generational history of hospitality and highly successful tourism hubs in place – Lake George and Gore Mountain. Several outdoor recreational opportunities exist to drive both extended season and four-season visitation; these in turn can be expected to leverage additional future investment in lodging, restaurant, attraction and other tourism related venues.

Recognizing the transformative potential that tourism has for Warren County, BBG&G is recommending the following strategies:

- Identify new audience segments that offer significant potential for growth.
- Identify and promote the attractors and experiences that are of highest interest to each segment and audience.
- Identify, create, "package", and promote events and recreational opportunities that will drive extended and four season visitation.
- Establish a standard process for allocation and distribution of tourism funds; require ROI and accountability.
- Build a county-wide perspective and foster an atmosphere of collaboration and cooperation. Create a climate that will allow entrepreneurs to flourish.

- Develop and sustain tourism infrastructure. Support smart community development that will help facilitate extended and year round visitation and attract and leverage private investment.
- Focus new lodging development on year-round, high amenity properties.

These last bullet points are included because we believe it is essential for Warren County to understand the importance of attracting and fostering development in attractions, lodging, facilities, and infrastructure that are attractive to the 21st century traveling public. This is critical to your communities that have committed to tourism as a major component of their economy and quality of life.

## WARREN COUNTY TOURISM

### Comprehensive Destination Research and Strategic Planning

Study Period: May – October, 2016

BBG&G Advertising & Public Relations, Inc. (BBG&G), a Campbell Hall, NY based destination research and marketing firm conducted scientific research which strategically analyzed the travel market in Warren County, New York for Warren County Tourism (WCT). The BBG&G team has used this methodology in developing strategic plans for many destinations of varying size. It is proven to work by driving increased visitation and economic impact for the community.

The market assessment and recommendations in this report will:

- Address the very unique aspects of Warren County, New York as a destination for leisure travel.
- Evaluate the current destination marketing organization structure, funding, program of work and overall marketing efforts for the destination.
- Provide an analysis of Warren County Tourism advertising, sales and marketing efforts to determine the highest and best use of Warren County Tourism funding and return-on-investment for the community.
- Establish a current Warren County visitor profile including key demographics, behavior and spending patterns.
- Identify those attractions and features/amenities within the destination, which drive travel and generate both overnight and repeat visitors to the Warren County area.
- Develop strategies that will effectively promote the Warren County region in the future, as well as identify opportunities for growth and development.

## WARREN COUNTY DESTINATION RESEARCH METHODOLOGY

### 1. Client Meeting, Destination Review

- Site Visit and Meetings – BBG&G representatives visited Warren County three times to tour the area, gain market knowledge first hand and meet key travel industry leader/partners.
- Meetings with Warren County Tourism staff and Advisory Board members included a detailed review of project objectives, inquiry databases and questionnaires for research study.
- One-on-one interviews were conducted in person and over the phone with multiple community stakeholders, business owners, and lodging owners.

### 2. Community Partner Survey

- A survey was conducted with the community and travel industry leaders of Warren County to gather their input regarding Warren County Tourism and the direction of the organization moving into 2017 and beyond.
- An online survey was distributed by email on June 2nd, 21st, and 28th, July 20th, and September 12th and 30th to individual community, civic and business leaders. The contact list was provided by Warren County Tourism.

### 3. Lodging Research and Analysis

- BBG&G Advertising, Inc. (BBG&G) conducted a survey of the hotel/motel/inn/B&B properties located in Warren County. A three-page questionnaire was sent to the lodging property database provided by Warren County Tourism to estimate the following for the full calendar year 2015: percentage of occupancy driven by nine (9) market segments, top leisure feeder cities, and percentage of adult-only vs. family travel parties. Hoteliers/inn keepers were also asked to provide annual occupancy percentages, average daily rates (ADR) and revenue-per-available-room (RevPAR) for calendar year 2015. The lodging survey was conducted during the months of July through October, 2016.

### 4. Visitor Profile and Conversion Research (online survey)

- To document the profile and planning preferences of those who visit Warren County, New York.
- The perceptions of Warren County as a destination.
- The attractors that induce overnight visitors and repeat visitors.
- Research includes those who have and have not visited the Warren County area.
- Warren County Tourism provided BBG&G with their database of visitor inquiries. Email recipients were invited to take a Warren County visitor survey and be entered into a chance to win a drawing for a signed and framed Carl Heilman canvas print of scenic Lake George, valued at \$250.
- 2,950 total survey responses received.

## 5. Attractions Survey

- A survey was conducted with the community and travel industry leaders of Warren County to gather their input regarding Warren County Tourism and the direction of the organization moving into 2017 and beyond. An online survey was distributed by email on June 21st, with reminders sent June 28th, July 20th, September 12th, and September 30th to individual sites and attractions. The contact list was provided by Warren County Tourism.

## 6. Peer Set Comparisons

- Warren County Tourism purchased Warren County, New York and peer set data from Smith Travel Research (STR) in the form of a six-year trend reports for all hotel/motel properties. The STR data reflects primarily chain-affiliated hotel/motels with a monthly response rate ranging from 57% – 95% participation.
- BBG&G conducted one-on-one interviews with key peers, including ROOST, Saratoga, and Saratoga Springs.

## 7. Operations: Best Practices & Opportunities

- Meetings with Warren County Tourism staff and Advisory Board members included a detailed review of project objectives, current county operational structure, challenges in the lodging sector, and questionnaires for research study.
- One-on-one interviews were conducted in person and over the phone with multiple community stakeholders, supervisors, business owners, partners, and lodging owners.

## 8. Brand & Marketing Strategy

- BBG&G conducted strategic market research on domestic and international tourism trends, consumer travel market segments offering opportunity, and travel marketing and media trends.
- In addition, we reviewed a wealth of data supplied by Warren County Tourism, including web analytics, occupancy and sales tax reports, current budgets, existing marketing plans, occupancy surveys, STR reports, media contracts, inquiry reports, and current marketing and advertising material.

## SUMMARY OF WARREN COUNTY RESEARCH REPORT SECTIONS

### 1. Destination Review – Research Team Observations

The BBG&G team visited Warren County three times and made the following destination observations. In brief, Warren County is a large diverse area comprised of many unique communities with impressive attractors and authentic Adirondack, culinary, and cultural assets that could drive visitation year-round. Warren County is:

- An authentic and iconic Adirondack destination enjoyed now for generations, with spectacular natural assets – lakes, waterways and mountains.
- A culinary destination with unique agritourism experiences such as wineries, breweries, maple syrup houses, farm stands, bakeries and you-pick farms, and a growing number of eclectic and high quality dining options.
- A heritage and cultural destination including Fort William Henry, the Hyde Collection, and an array of smaller museums and galleries.
- An outdoor destination with a wide range of Outdoor Adventures – from rugged to recreational.
- A family-oriented and friendly destination, with a rich array of activities available and walkable downtowns and villages.
- A convenient destination for New Yorkers with accessibility from the South and North via the Northway corridor.
- A great overnight destination with a wide array of diverse lodging options – from “glamping” and luxury hotels to cabins, B&B’s, camping and inns.

### 2. Community Partner Survey

- Respondents represent community leaders that have been involved with Warren County an average of 13 years.
- Summer Family Getaways/Vacations, Family Reunions, and Festivals & Events rated highest as having appeal to visitors.
- Warren County’s best visitor assets as a destination were identified by leaders as:
  - 1) Waterfront and lake activities and Summer Sports and outdoor
  - 2) Festivals and events
  - 3) Winter sports and outdoor
  - 4) Arts and cultural and Historic and heritage
- Warren County’s assets needing improvement, expansion, or more promotion include:
  - 1) Fine dining; 2) Large scale retail & unique shopping; 3) Farmer markets and culinary activities
- Over the next decade, Warren County needs to focus on:
  - 1) Enhancing the visitor experience
  - 2) Developing Warren County into a year-round destination
  - 3) Adding new attractions/activities
- New York City, New Jersey, Massachusetts, and Connecticut were identified as the significant regional markets WCT should target for concentrated direct sales efforts.

- The following segments were identified by leaders as the best targets for future direct sales efforts: 1) Individual and family leisure travelers; 2) Weddings/reunions/family events; 3) Association groups; 4) Corporate groups; and 5) Group tour/motor coach.
- The following sales and marketing priorities were recommended to the WCT by community leaders: 1) Maintain relationships for repeat business; 2) Increase social media presence and 3) Increase internet presence.

### 3. Warren County Lodging Analysis

Smith Travel Research reports approximately 160 hotel/motel/inn properties with 6,660 lodging rooms. WCT reports approximately 27 Bed & Breakfast Inns with a total capacity of 406, as well as a host of cabins, lodges, inns, and cottages that do not report to STR, bringing Warren County's total lodging inventory to well over 9,000 rooms (this number fluctuates regularly as lodging properties add and delete rooms from their inventories).

- According to the lodgings reporting to STR, 75% of Warren County's hotel/motel/inn lodging inventory was built prior to 1980; open date was unknown for several properties. During the 1980's and 1990's, 20 hotel/motel properties were added to Warren County's lodging inventory. Twenty additional hotel properties were opened from 2000 – August 2016, The Marriott is the newest chain-affiliated property developed in the Warren County lodging market. The 60-room Sundowner Motel was purchased in April, 2016, and renovated.
- On an annual basis Warren County's monthly lodging occupancy is slowest in the winter months of November, December and January and highest during the late summer or early autumn. Occupancy was consistently at or above the critical 60% mark during the months of May through September of this year (2016).
- Overall, leisure travelers account for the highest percentage of Warren County lodging occupancy in 2015 – 44% for Tourists visiting Local Sites and Attractions, 26% for Recreational Outdoor Activities, and 15% for Family Events.
  - ◇ Conference/meeting/groups was reported second highest at 12%, with the wedding segment reporting at 6%. Business reported at only 5%.
- Friday and Saturday nights are the busiest nights for Warren County lodging properties, followed by Wednesday and Tuesday nights which also averaged close to 60% or higher June through August over the period June, 2015 – September, 2016. Sunday and Monday nights are typically the slowest nights of the week for Warren County's lodging properties, as seen in many similar destinations.
- As is typical of most destinations, visitors of all types from within the state of New York drive the most room nights in Warren County. Hoteliers report their individual top points-of-origin for the Warren County leisure market are New York City, northern NJ, Albany, MA, the Hudson Valley, and Canada/Quebec.
- Warren County STR reports have reported for both Year-to-Date and Running 12 Months for the period April, 2015 - September, 2016, an overall positive trend in all lodging metrics; Running 12 Months Occupancy 0%, Demand +1.1%, ADR +2.7%, RevPAR +2.7%, and Revenue +3.8%; Year-to-Date Occupancy -.09%, Demand +0.2%, ADR +3.1%, RevPAR +2.2%, and Revenue +3.3%. These positive results are in spite of a non-existent winter, the restructuring of the tourism department, and the tourism department being down two staff members.

#### 4. Warren County Visitor Surveys

The following data points summarize the typical profile of those visitors to Warren County, New York.

- 75% of respondents have visited Warren County; 5.73% were full or part-time residents, 3% were residents of neighboring counties, and 16% expect to visit.
- 52% of respondents were from the state of New York, followed by NJ, CT and PA. 6% of respondents were from Canada.
- The demographic profile of visitors is more heavily adults-only couples (61% of all visitors).
- The average age of female respondents was 51, the average age of males, 56.
- Warren County travelers are well-educated, 83% has some level of college education, at least 59% has a college degree or higher.
- Repeat visitors – over 85% or more of each segment has been to Warren County more than once. 25% of repeat visitors have visited six or more times.
- In advance planning – over 25% of travel is planned 2-3 months before the trip, 12% 4-5 months before travel, and over 16% 6 months or more in advance. 20% of travel is booked 1 month before.
- Adults-only travel parties represent 61% of your overnight visitors; 39% of your overnight travel parties were comprised of adults traveling with kids.
- Respondents were primarily overnight visitors (78%) versus day-trippers (22%).
- Over 98% of all travel segments would recommend Warren County to others while over 91% plan to visit again in the near future.

#### 5. Attractions Survey

- Geographic location of respondents
- Primary category of attraction or business
- Gate count
- Percentage of business attributed to day trip visitors
- Percentage of occupancy and what it's driven by
- Percentage of repeat business
- Acceptance of motor coach group tour business
- Location that majority of guests originate from
- Business trends and indicators
- Perception of Warren County as a place to live, work and visit
- Visitation satisfaction level
- Current major event appeal to travelers
- Initiative priority level
- Regional markets/cities Warren should target
- Travel market segments to target for future growth
- What words used to describe Warren County
- What makes Warren County a unique travel destination
- Specific topics/issues to consider addressing in the long range plan

## 6. Peer Set Comparisons

- Warren County's lodging occupancy kept pace or outperformed the national average in July and August of 2016. According to STR, the U.S. hotel industry's occupancy rate for July 2016 was 74.4%; Warren County's was 74.7%. Likewise, the U.S. hotel industry's occupancy rate for August 2016 was 70.2%; Warren County's was 77.6%.
- Like many of its peers, Warren County saw a slight dip in occupancy in 2013, mostly likely due to the hurricane, as well as a dip in sales tax. A slight increase in room supply, in conjunction with a slight decrease in demand over the two-year period 2012 to 2013, also helps explain the declining occupancy rate during that time period.
- However, ADR and RevPAR have continued to increase 2010 through 2015. Warren County STR reports also show an overall positive trend in all lodging metrics for both Year-to-Date and Running 12 Months for the period April, 2015 - September, 2016; Running 12 Months Occupancy +0%, Demand +1.1%, ADR +2.7%, RevPAR +2.7%, and Revenue +3.8%; Year-to-Date Occupancy -.09%, Demand +0.2%, ADR +3.1%, RevPAR +2.2%, and Revenue +3.3%. These positive results are in spite of a non-existent winter, the restructuring of the tourism department, the tourism staff rebuilding community connections through many stakeholder queries and meetings, and the tourism department being down two staff members.

## 7. Operations: Best Practices & Opportunities

- Expand the current focus on Lake George and remove the emphasis on townships by creating itineraries and packages that promote and highlight more of the anchor assets and experiences within the county.
- Develop tactics for building coalition between stakeholders: hoteliers, economic development, campgrounds, attractions, and chambers throughout the county.
- Encourage chambers to function more powerfully as business organizations, facilitating the transfer of their more tourism-related functions to WCT.
- Dedicate tourism department staff time to planning and coordinating new events.
- Give the Warren County Tourism Department the authority to articulate and define the specific county-wide criteria and process by which budget allocations are granted.
- Allocation process should require that grants are driven by and support overall county marketing strategy and produce proven ROI – driving out-of-county visitation and visitor retention, help achieve greater market reach, expansion of targeted market segments, extended seasonality, and increase sales and occupancy tax revenues.

## 8. Brand & Marketing Strategy

- Reposition Lake George and the surrounding areas as a multiple season destination to those who may not have otherwise considered it, in both leisure and group markets.
- Plan for desired audiences and bundle assets into itineraries and packages and promote early on.
- Plan marketing strategies and events geared to important market segments.
- Ignite the core strengths of Warren County.
- Extend your season.
- Increase collective collaboration.

## STRATEGIC DIRECTION

The following strategies are offered based on the research conducted for Warren County in this study.

### Strategic Focus for Warren County Tourism

- Overnight visitation is critical for spending – the research confirmed that far more visitors stay overnight than make day trips, and that visitors average trip expenditures are larger than day-trippers.
- January through June is the best opportunity for growth – occupancy during the first six months of the calendar year is typically below 60%. The summer months of July and August run higher occupancy, but the spring and autumn months offer opportunity for ROI from marketing investments. While November and December have low occupancy these months are difficult to improve due to Americans having limited free time for travel during this busy time of year.
- Attractors vs. attractions - Promote the attractors that motivate the visit To Warren County which will result in increased attendance at all attractions. The visitor survey responses identified the top attractors in Warren County as The Factory Outlets of Lake George, Lake George Steamboat Cruises, Fort William Henry, Great Escape, Natural Stone Bridge & Caves and Gore Mountain.
- Emphasize unique shopping and fresh, local unique dining – Shopping is the number one traveler activity nationwide and one of the most popular visitor activities for travelers to Warren County, along with Driving/sightseeing, Swimming & Water Sports, and Boating and Water Sports. Fine local dining follows closely behind, and could use more promotion to drive greater awareness of the dining options available around the county – especially outside the more low-budget and casual options Lake George Village is known for. Travelers to Warren County are seeking unique experiences in settings that provide lasting memories. Warren County is the ideal authentic Adirondack destination where travelers can also buy unique food and gift items to take home.
- Expand the brand – weave in the multiple types of experiences waiting for visitors in the Lake George/Adirondack Gateway area.
- Target the three to five hour drive market – There are 44 million people in the four-state region of New York, Connecticut, New Jersey and Pennsylvania. This drive market is the best area to target for future visitation.
- International visitors – Warren County is in close proximity to the most popular international destination in America (NYC) and should therefore partner with the State Travel office and other entities to reach inbound foreign travelers. Priorities are Canada, UK, and Germany.
- Engage the visitor to drive increased in-market spending – The primary strategy is to drive increased visitation followed by increasing visitor spending in Warren County by better conveying your multi-faceted travel experience – driving longer lengths of stay with increased engagement with businesses in Warren County.

## Marketing Warren County

- Expand the visuals in all marketing platforms - Warren County is a visual “wow” and the website and social media platforms are more informational than awe inspiring. Increased use of photography will inspire people to visit, especially when you incorporate images that help people imagine themselves at your destination.
- Help your different market segments envision what a multiple-day stay would be like. Create itineraries, travel tours, and packages around the interests and assets that match different market segments, and that highlight different areas of the county. Each of those areas has a different feel and character – celebrate those unique qualities, and package them as excursions and getaways, using the lodging available in Lake George, Queensbury, and Bolton as hubs.
- Use social/digital media – the primary market for Warren County is the NYC metro area, including northern New Jersey and parts of Pennsylvania; and nearby New England, primarily Connecticut and Massachusetts. Some of these are the most expensive markets in which to advertise. Therefore WCT will have to use digital and social media to make the deepest penetration into these markets with the best ROI.
- Traditional advertising still works - Leverage co-ops with local partners to extend exposure in traditional ad placement such as the NY State Travel Guide, guide books such as AAA, travel inserts and regional publications.
- Public relations with travel media always delivers the biggest bang for the buck. WCT should expand its effective outreach to travel media to drive more media visits, Fam Tours, and editorial exposure.
- Consolidate the monies spent on individual brochures and rack cards and retain those funds within WCT’s budget for collateral and marketing that focuses on experience-oriented, cross-county promotional guides, slide shows, and digital/interactive displays that will better tell the story of the breath of experiences available for the traveler in Warren County.
- Group sales – Work closely with the CVB to target the following segments: group tour, small meetings, religious, sports, and tournaments.

## Manage the Warren County Travel Experience and Foster Greater Connectivity

- Weave together similar attractions and events into more holistic offerings.
- Add a booking engine to the WCT web site.
- Focus on connectivity and wayfinding – Warren County is quite large and has multiple destinations within its boundaries. Moving visitors around Warren County is essential to driving economic impact. Strategies include:
  - ◇ Improved maps
  - ◇ Standardize visitor center kiosks and available information
  - ◇ Develop a directional signage master plan
  - ◇ Develop driving and cycling tours and itineraries and have them available on the WCT web site
  - ◇ Directional signage at key intersections in your northern and western sections

- Reinterpret the Adirondack experience to appeal to international and Millennial audiences – Warren County encompasses everything anyone could want in an Adirondack experience – several beautiful lakes, including Lake George; a wealth of outdoor and recreational activities; superlative beauty; the mountains; a variety of available tourism experiences (from sublime and serene to miniature golf and steamboat rides); new things to do and learn; historic and cultural assets; and a full range of dining options. Rethink how to present and position what you have to market segments.
- Connect the cultural and dining experiences to your leisure outdoor experiences – your hiking and bicycle trails throughout the County.
- Expand promotion of your outdoor experiences – market the varied opportunities to get out on a bike, on a trail, in a kayak, shooting, hunting, fishing, rafting, horseback riding, skiing, snowshoeing, etc., to draw a year-round audience.
- Celebrate the artistic and cultural elements of the communities – and your unique easy connection from your downtowns to the scenic outdoors. A dedicated PR effort promoting the County as multifaceted scenic/cultural/culinary/arts destination would pay off in increased visitation.

### Long-term Vision for Warren County as a Destination

- Empower Warren County Tourism to deliver maximum ROI for the County.
  - ◇ WCT needs an independent Advisory Board representing specific segments of the travel industry.
  - ◇ WCT should be given the authority to articulate and define the specific county-wide criteria and process by which budget allocations are granted to events, group, and/or municipalities. This process should also define required documented ROI and accountability. Allocation process should require that allocations and grants are driven by and support overall county marketing strategy – and specifically drive out-of-county visitation and visitor retention, help achieve greater market reach, expansion of targeted market segments, extended seasonality, and increase sales and occupancy tax revenues. Supported events and funding should represent best value for investment.
- Create a plan for a new Destination Warren 2020! Warren County leaders need a collective vision for development that will result in a sustainable long-term travel economy. Take this report and bring leaders together to develop a plan that will enhance the scenic beauty of the destination while enriching and expanding upon current travel assets.
- Increase funding for Warren County Tourism – consolidate some of the monies now disbursed out to the townships into the market budget for increased event, public relations, and international outreach.
- Foster more regional collaboration. Look to partner with Albany and Saratoga.
- Foster more cross-promotion and education. Partnership and teamwork are CRITICAL! An engaging partnership program should include:
  - ◇ Brochure Exchanges
  - ◇ Lunch and Learns on topics of interest to your tourism partners

- ◇ Seminars and workshops
- ◇ Culinary, travel, and group expos
- ◇ Training and seminars on the international market to the business community.
- ◇ Marketing co-op programs
- ◇ Opportunities for input into future planning

### **Possible Additional Steps**

- Feasibility Study for a possible Convention Center
- Marketing Segment Study

## 2. Community Partner Report



### COMMUNITY PARTNER SURVEY

#### Research Purpose

A survey was conducted with the community and travel industry leaders of Warren County to gather their input regarding Warren County Tourism and the direction of the organization moving into 2017 and beyond.

#### Research Methodology

An online survey was distributed by email on June 2nd, 21st, and 28th, July 20th, and September 12th and 30th to individual community, civic and business leaders. The contact list was provided by Warren County Tourism. One email bounced, one opted out, and one only partially completed. A total of 40 surveys were successfully emailed. The survey was completed by a total of 21 people.

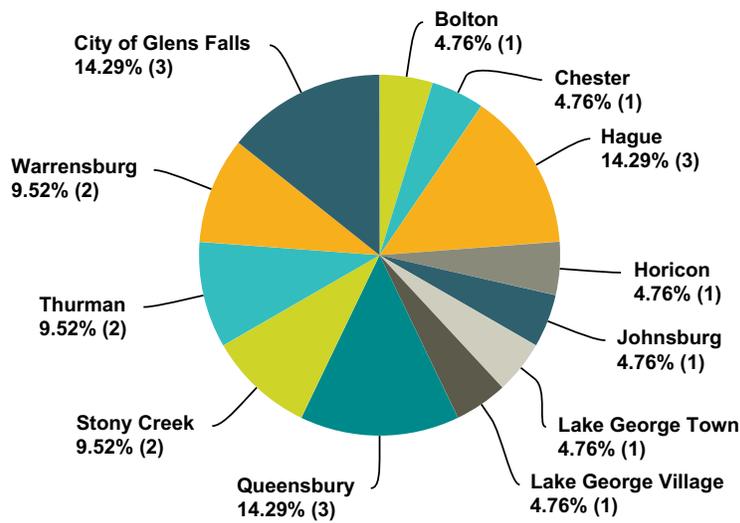
#### Summary of Findings

- Respondents represent community leaders that have been involved with Warren County an average of 13 years.
- Summer Family Getaways/Vacations, Family Reunions, and Festivals & Events rated highest as having appeal to visitors.
- Warren County's best visitor assets as a destination were identified by leaders as:
  - 1) Waterfront and lake activities and Summer Sports and outdoor
  - 2) Festivals and events
  - 3) Winter sports and outdoor
  - 4) Arts and cultural and Historic and heritage
- Warren County's assets needing improvement, expansion, or more promotion include: 1) Fine dining; 2) Large scale retail & unique shopping; 3) Farmer markets and culinary activities
- Over the next decade, Warren County needs to focus on:
  - 1) Enhancing the visitor experience
  - 2) Developing Warren County into a year-round destination
  - 3) Adding new attractions/activities
- New York City, New Jersey, Massachusetts, and Connecticut were identified as the significant regional markets WCT should target for concentrated direct sales efforts.
- The following segments were identified by leaders as the best targets for future direct sales efforts: 1) Individual and family leisure travelers; 2) Weddings/reunions/family events; 3) Association groups; 4) Corporate groups; and 5) Group tour/motor coach.

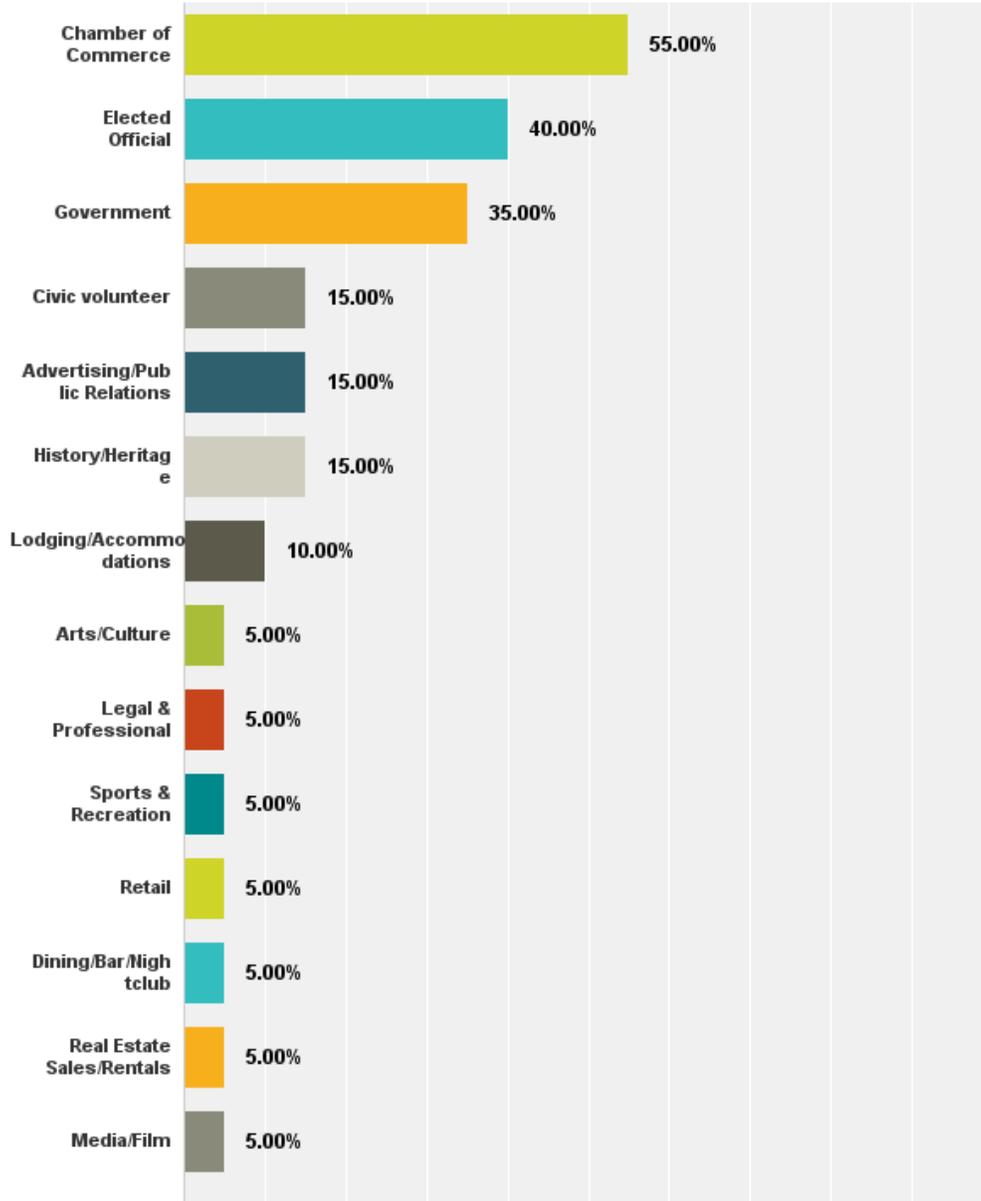
- The following sales and marketing priorities were recommended to the WCT by community leaders: 1) Maintain relationships for repeat business; 2) Increase social media presence and 3) Increase internet presence.

## COMMUNITY LEADERS' RESPONSES

### 1. Check the community in which you live and work.



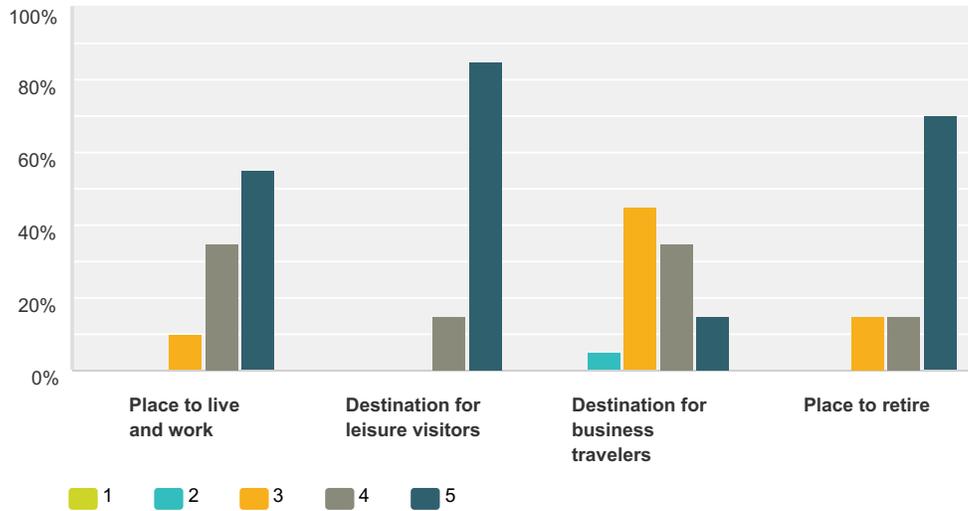
2. Please indicate your field(s) of employment or leadership in Warren County:  
 (Check all that apply)



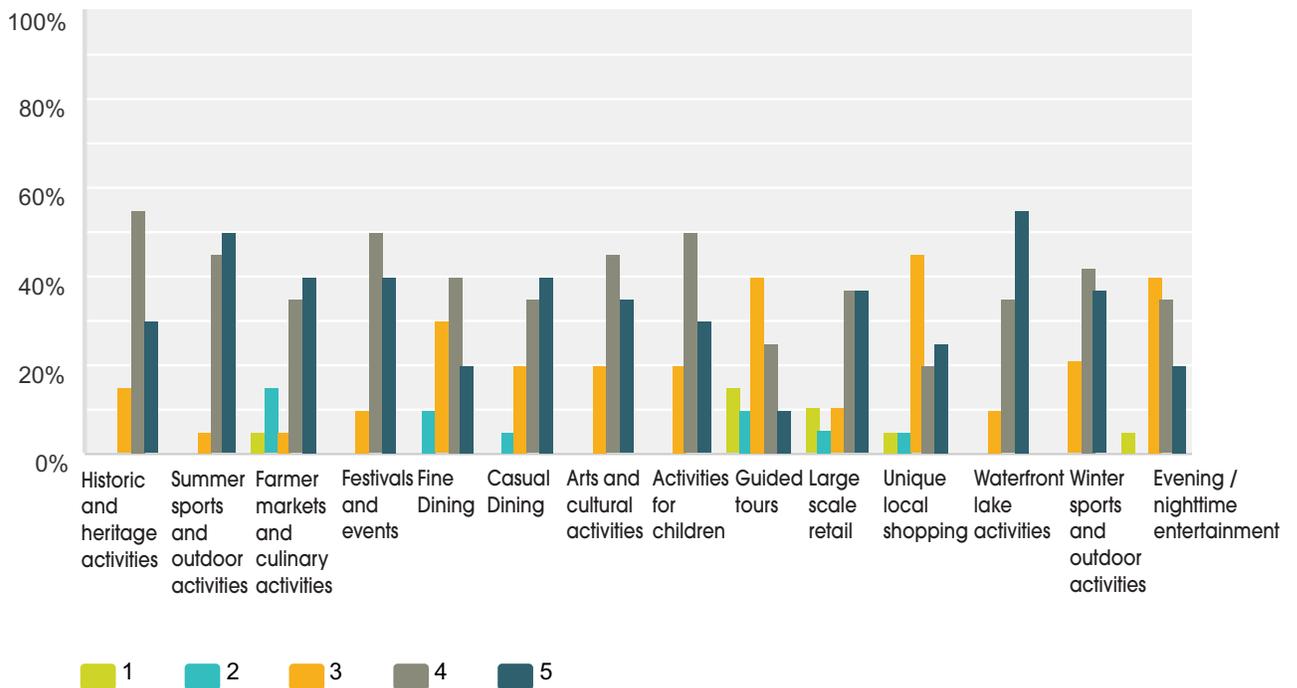
3. How long have you been actively involved in Warren County community affairs and/or leadership?

Average: 13 years

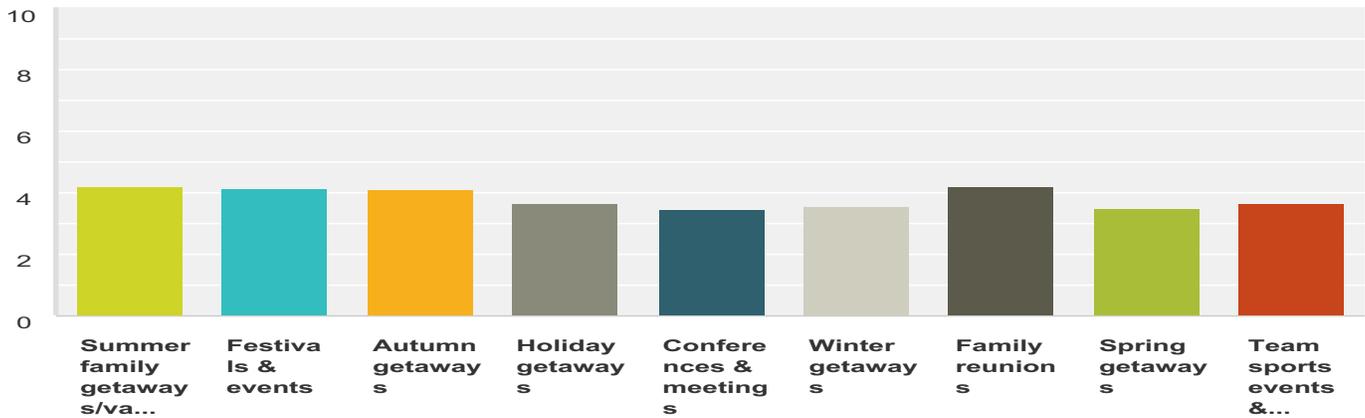
4. Rate your current perception of Warren County as a place to live, work, and visit. Use a 5-point scale where 1=poor, 3=average and 5=excellent.



5. When friends, family or business guests visit you, please rate your level of satisfaction with the following Warren County experiences. Use a 5-point scale where 1=poor, 3=average and 5=excellent.



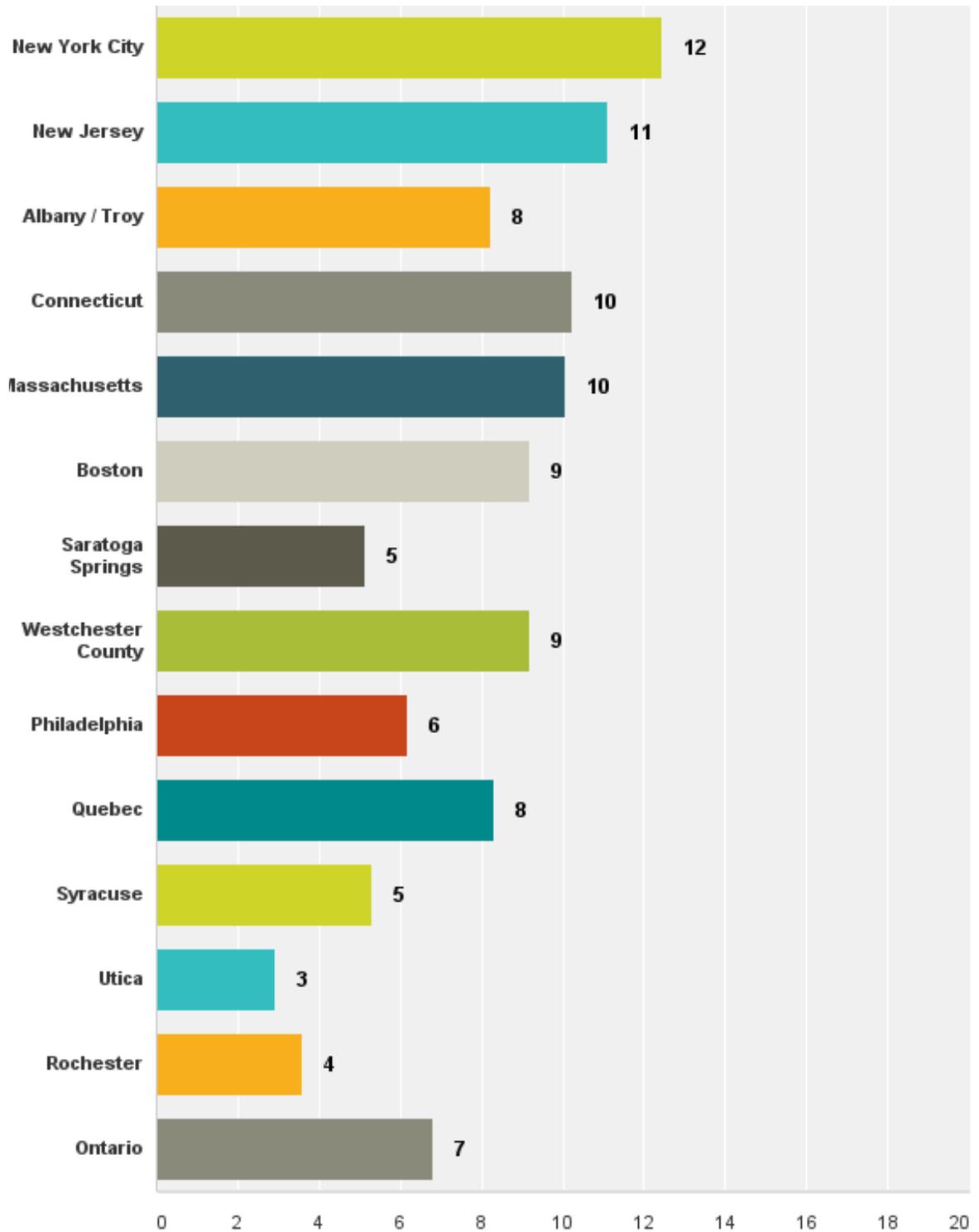
6. Following is a list of current major events and areas of visitor interest in Warren County. Please indicate for each whether you see its APPEAL TO TRAVELERS as declining, remaining the same or growing OVER THE NEXT FIVE YEARS. Use a 5-point scale where 1=poor, 3=average and 5=excellent. (Select N/A if you are unfamiliar with that one)



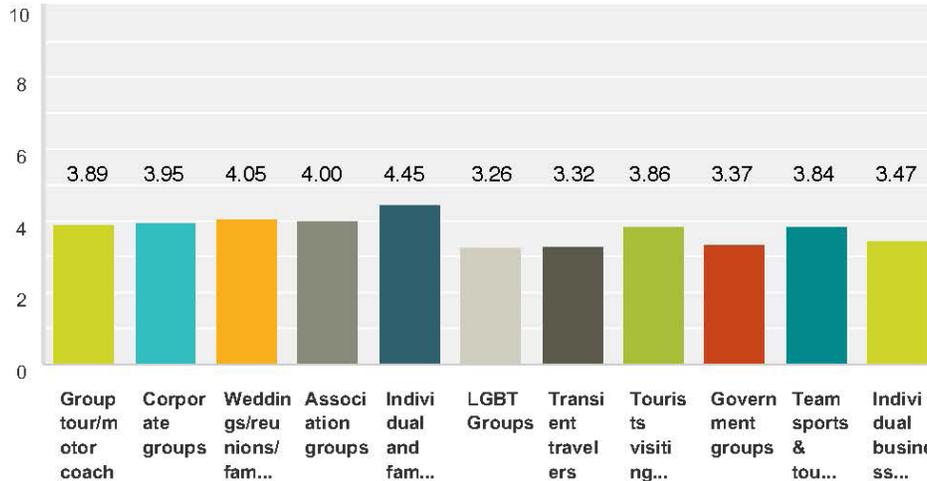
7. Please indicate your level of priority for the following POSSIBLE initiatives for Warren County as a destination in the coming decade. Use a 5-point scale where 1=poor, 3=average and 5=excellent.

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)
Develop Warren County into a year-round destination	0.00% 0	0.00% 0	20.00% 4	35.00% 7	45.00% 9
Enhance the visitor experience	0.00% 0	0.00% 0	5.00% 1	55.00% 11	40.00% 8
New attractions/activities	5.26% 1	0.00% 0	15.79% 3	42.11% 8	36.84% 7
Public trans. to connect Warren County communities	5.00% 1	5.00% 1	20.00% 4	45.00% 9	25.00% 5
New meeting/conference center	0.00% 0	10.00% 2	25.00% 5	40.00% 8	25.00% 5
New performance venues	0.00% 0	0.00% 0	30.00% 6	45.00% 9	25.00% 5
Enhance quality of workforce and training	0.00% 0	10.00% 2	5.00% 1	65.00% 13	20.00% 4
Add new shopping/dining/lodging	5.00% 1	0.00% 0	30.00% 6	45.00% 9	20.00% 4
New tournament level sports facilities	0.00% 0	0.00% 0	50.00% 10	40.00% 8	10.00% 2
New destination resort lodging	5.26% 1	10.53% 2	21.05% 4	57.89% 11	5.26% 1
New health/wellness offerings	0.00% 0	0.00% 0	45.00% 9	50.00% 10	5.00% 1
Keep Warren County the same	40.00% 8	15.00% 3	20.00% 4	20.00% 4	5.00% 1

8. What regional markets/cities (in rank order) should Warren County Tourism target for direct sales efforts to attract travelers as groups or individuals?



9. Please rank the travel market segments Warren County Tourism should target for FUTURE growth through direct sales efforts. Use a 5-point scale where 1=Do not consider, 2=Not really important, 3=Some consideration and 4=Most important.



10. Please indicate your recommendation to Warren County Tourism related to the following sales strategies in terms of importance for the WCT sales team. Use a 5-point scale where 1=Do not consider, 2=Not really important, 3=Some consideration, 4=Important and 5=Most important.

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)
Maintain relationships for repeat business	0.00% 0	0.00% 0	5.26% 1	36.84% 7	57.89% 11
Increase social media presence	0.00% 0	0.00% 0	10.53% 2	36.84% 7	52.63% 10
Increase internet presence	0.00% 0	0.00% 0	11.11% 2	27.78% 5	61.11% 11
Coordinate electronic co-op advertising	0.00% 0	5.56% 1	11.11% 2	27.78% 5	55.56% 10
Participate in trade shows for group business	0.00% 0	5.56% 1	11.11% 2	27.78% 5	55.56% 10
Consumer shows for leisure travelers	5.56% 1	5.56% 1	33.33% 6	22.22% 4	33.33% 6
Coordinate print co-op advertising	0.00% 0	5.56% 1	27.78% 5	33.33% 6	33.33% 6
Increase print advertising in trade journals	5.56% 1	16.67% 3	33.33% 6	38.89% 7	5.56% 1
Phone prospecting for new business	22.22% 4	27.78% 5	27.78% 5	11.11% 2	11.11% 2
Cold calls in the field	33.33% 6	44.44% 8	11.11% 2	0.00% 0	11.11% 2
Organize sales blitzes to regional markets	0.00% 0	11.76% 2	23.53% 4	41.18% 7	23.53% 4

## 11. What words would you use to describe Warren County to a friend or colleague who has never been to Warren County?

### Verbatim Responses:

Fun place, lots to do, beautiful scenery

Picturesque

Beautiful spectacular awesome adventurous

Beautiful

Great vacation area

Rustic outdoor adventures within miles of shopping and dining.

A little bit of everything

A slice of heaven

Beautiful

Scenic, relaxing

Beautiful, safe, scenic

A great mix of water, mountains and scenery all with easy access!

Family friendly

Foothills of the real ADKs

It has multifaceted appeal, with appeal for many, many interests and preferences.

The most beautiful place in the whole wide world

Beautiful, rural

Beautiful

Great quality of life

## 12. What makes Warren County a unique travel destination? (Please list single words or short phrases)

### Verbatim Responses:

Fun place, lots to do, beautiful scenery

Outdoor beauty

The lakes ponds rivers and mountains

Geography

Landscape

Accessible, varied, low key, real

Adirondacks

Variety of activities, spectacular environment

Beautiful Queen of Lakes

Accessibility within a 4-5 hour drive to a population of over 55 million

Friendly small town

Variety of experience

Mountains, lakes, history

We've got it all

Beauty with activities

Scenery

Nature

### 13. Are there other specific topics or issues you would like to be addressed in the Warren County long range plan? (Verbatim)

- A more comprehensive approach to attracting visitors, not just Lake George. We have many assets and should play all our cards.
- Extended tourism season
- Snowmobiler Friendly
- Coordination of marketing efforts and logistics between chambers, CVBs, LakeGeorge.com and County
- 1) how to strengthen/maintain local identity (who are we as a people/culture); 2) how to solidify connection with the rest of the Adirondacks (are we considered and integral part or second class?)
- Spending occ tax and extending the season
- Better, more effective use of Occupancy Tax funds as it applies vis-a-vis to not only tourism but all markets!
- Inviting visitors to the smaller towns--not just Lake George
- Leveraging/coordinating of ADK tourism efforts with ROOST
- Thanks for all you do!
- Changing lodging markets
- Should work closer with Chambers of Commerce
- Work towards 4 season area

### From intake interviews (Verbatim)

- Need Convention Center (supported by Occupancy Tax) to compete with Essex County and Saratoga. Tourism office should be there
- Sell the "return to your youth" family vacation. Increase occupancy for Mom and Pop's or they will die out.
- Internet is needed throughout county - work with legislators
- Adirondack Park Agency - has regulations in place that hamper tourism efforts
- Invasive (lake) species - should be dealt with using state dollars, not occupancy tax dollars
- Lake George has been talking about wanting to be year-round destination. . . now has Marriott to help that happen. Substance of tourism needs to be worked on. Need to pull from within, and identify what are the strengths of Warren County. Glens Falls is not well situated within current campaign. County needs consistent campaign. Present assets in an organized and energized manner. Get beyond the surface of the County, get to the good bones of the County - all the other activities

- What does being “organized for success” mean? How the county is organized is a legislative function rather than a tourism function.
- Better methodology for distribution of occ tax funds. Not based on ROI, no accountability
- Sees a role for people who have a keen interest. Give them a forum. (Form an) Advisory Committee to merge the two interests....to meet with Tourism staff....bridge the lodging, tourism, and supervisory groups....and make recommendations to Board
- Supervisors are well intentioned, but are not marketing or tourism professionals; would be to their benefit to have this burden of decision-making (hotel tax allocations) removed from their shoulders.
- Get NYS to help with sewage problem around lake. Quality of lake is critical.
- County doesn't have a Convention Center. Doesn't have focused program for attracting Spring and Fall visitors.
- Monies collected from bed tax should go to centralized effort. So everyone is speaking the same language. Same brand.
- Visitors need centralized message and better centralized county tourism resources

# 3. Lodging Survey Report



## LODGING SURVEY

### Research Methodology

BBG&G Advertising, Inc. (BBG&G) conducted a survey of the hotel/motel/inn/B&B properties located in Warren County, New York at the request of Warren County Tourism (WCT). A three-page questionnaire was written by BBG&G, approved by WCT and sent to the lodging property database provided by Warren County Tourism to estimate the following for the full calendar year 2015: percentage of occupancy driven by nine (9) market segments, top leisure feeder cities, and percentage of adult-only vs. family travel parties. Hoteliers/inn keepers were also asked to provide annual occupancy percentages, average daily rates (ADR) and revenue-per-available-room (RevPAR) for calendar year 2015. The lodging survey was conducted during the months of July through October, 2016.

### Summary of Findings

Smith Travel Research reports approximately 160 hotel/motel/inn properties with 6,660 lodging rooms. WCT reports approximately 27 Bed & Breakfast Inns with a total capacity of 406, as well as a host of cabins, lodges, inns, and cottages that do not report to STR, bringing Warren County's total lodging inventory to well over 9,000 rooms (this number fluctuates regularly as lodging properties add and delete rooms from their inventories).

According to the lodgings reporting to STR, 75% of Warren County's hotel/motel/inn lodging inventory was built prior to 1980; open date was unknown for several properties. During the 1980's and 1990's, 20 hotel/motel properties were added to Warren County's lodging inventory. Twenty additional hotel properties were opened from 2000 – August 2016, The Marriott is the newest chain-affiliated property developed in the Warren County lodging market. The 60-room Sundowner Motel was purchased in April, 2016, and renovated.

On an annual basis Warren County's monthly lodging occupancy is slowest in the winter months of November, December and January and highest during the late summer or early autumn. Occupancy was consistently at or above the critical 60% mark during the months of May through September of this year (2016).

Overall, leisure travelers account for the highest percentage of Warren County lodging occupancy in 2015 – 44% for Tourists visiting Local Sites and Attractions, 26% for Recreational Outdoor Activities, and 15% for Family Events.

Conference/meeting/groups was reported second highest at 12%, with the wedding segment reporting at 6%. Business reported at only 5%.

Friday and Saturday nights are the busiest nights for Warren County lodging properties, followed by Wednesday and Tuesday nights which also averaged close to 60% or higher June through August over the period June, 2015 – September, 2016. Sunday and Monday nights are typically the slowest nights of the week for Warren County's lodging properties, as seen in many similar destinations.

As is typical of most destinations, visitors of all types from within the state of New York drive the most room nights in Warren County. Hoteliers report their individual top points-of-origin for the Warren County leisure market are New York City, northern NJ, Albany, MA, the Hudson Valley, and Canada/Quebec.

Warren County STR reports have reported for both Year-to-Date and Running 12 Months for the period April, 2015 - September, 2016, an overall positive trend in all lodging metrics; Running 12 Months Occupancy 0%, Demand +1.1%, ADR +2.7%, RevPAR +2.7%, and Revenue +3.8%; Year-to-Date Occupancy -.09%, Demand +0.2%, ADR +3.1%, RevPAR +2.2%, and Revenue +3.3%. These positive results are in spite of a non-existent winter, the restructuring of the tourism department, the tourism staff rebuilding community connections through many stakeholder queries and meetings, and the tourism department being down two staff members.

### Geographic Segmentation - Warren County Lodging Room Inventory

Warren County has geographically distinct lodging areas within the County. The majority of lodging rooms exist in Lake George, Queensbury, Bolton Landing and Diamond Point, with smaller clusters in Chestertown, Gore Mountain area, Hague, Lake Luzerne, Warrensburg, and Stony Creek.

### Warren County Lodging Survey Participation

Warren County Tourism provided BBG&G with a lodging database of chain-affiliated hotel/motel properties as well as Bed & Breakfast/inn properties and campgrounds in Warren County, New York. There were 258 hotel/motel/inn and Bed & Breakfast/inn properties actively collecting the local lodging tax and 32 campgrounds in the database when the BBG&G lodging study began in July, 2016. Over the course of four months, 46 lodging properties participated in the survey representing an overall response rate of 16%. While this response rate is slightly lower than BBG&G typically sees in similar studies, based on the mix of properties that responded, the data is considered to be an insightful sample representation of the overall market based on the geographic distribution. The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the BBG&G survey.

### 2015 Annual Overall Hotel/Motel Lodging Market Segmentation

When marketing tourism for a destination, it is critical to understand the different market segments that drive occupancy in local lodging properties. These segments help provide an understanding of the visitor categories that drive the greatest economic impact for the area. Most lodging properties track their guest segmentation through their reservation system. Corporate and group business is tracked closely by rate codes while leisure segment data is often estimated by the management team at the individual properties.

## Travel Categories (Leisure vs Business vs Group)

Overall, combined leisure segments account for the highest percentages of lodging occupancy in 2015 at 44% for Tourists visiting Local Sites and Attractions, 26% for Recreational Outdoor Activities (biking, hiking, swimming, skiing, etc.), and 15% for Family Events.

Conference/meeting/groups was reported second highest at 12%, with the wedding segment reporting at 6%.

Business reported at only 5%.

People visiting local friends and relatives, and Transients passing through accounted for another 15% of occupancy.

Clearly, Warren County has ample opportunity to grow the conference/meeting/groups and business segments.

## Travel Party Composition

Twenty-three Warren County lodging survey respondents reported travel party composition. An average of 52% of travel parties contain adults only while 51% of travel parties contain children.

However, hotels/motels reported about 10-50% adults only; inns were weighted a bit more towards adults only (50 to 100%); and campgrounds were heavily comprised of family travel (50-95%). Bed & Breakfast reported a higher percentage of adult only travel parties at 80-90% which is typical of the B&B market.

This differs from national trends reported by US Travel Association which state only one in five (22%) trips in the United States includes children.

## Top Hotel/Motel Leisure Feeder Markets

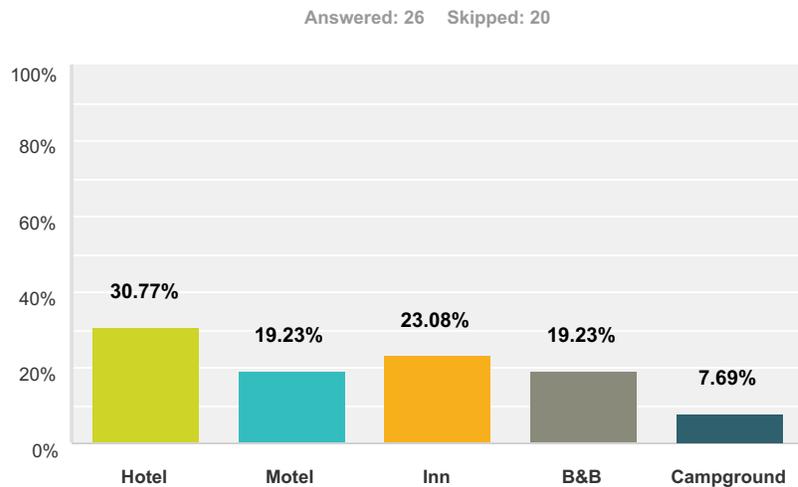
Lodging properties in Warren County were asked to report the top leisure markets for their properties. The top responses are listed below.

- New York
- New York metropolitan area
- New Jersey
- Hudson Valley
- Buffalo/Syracuse
- Massachusetts
- CT/RI
- Quebec
- Eastern Pennsylvania
- Saratoga
- Albany
- Canada
- NH/VT

## 1. Check the community in which your property is located.

Answer Choices	Responses	
Lake George Village	17.39%	8
Bolton	15.22%	7
Lake George Town	15.22%	7
Queensbury	13.04%	6
Johnsburg	10.87%	5
Lake Luzerne	6.52%	3
Diamond Point	6.52%	3
Hague	4.35%	2
Stony Creek	4.35%	2
Chester	2.17%	1
Horicon	2.17%	1
Thurman	2.17%	1
Pottersville	0.00%	0
Warrensburg	0.00%	0
City of Glens Falls	0.00%	0
<b>Total</b>		<b>46</b>

## 2. Are you a/an:



### 3. When was your property built?

2006	1850	1894	1948	1952	1968
1883	1926	1880	1956	1972	2006
1883	2008 (rebuilt)	1868	2000	1945	1953
1960	2004	early 1800's	1940	2000	1909
1956					

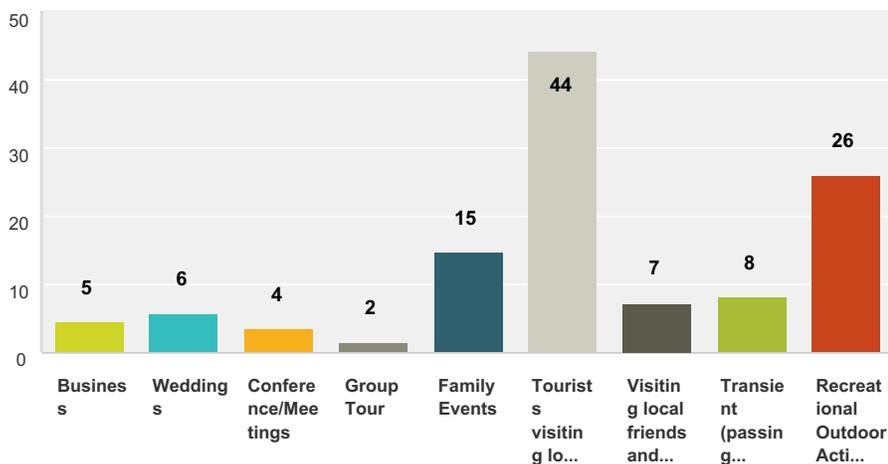
### 4. How many lodging rooms does your property have?

82	4	4	19 cottages	10	577
375	4	3	17	10	200
395	86	153 campsites	3	78	18
(4) 3 BR cottages and (6) 2 BR cottages	18	5	194	42	11 Villas, 21 Townhouses
12	5 cottages				

### 5. What is your total lodging capacity?

388	8	10	90	45	2500
1200	11	7	69	40	1200
324	153	8	364	95	65
52	12	978	100	200	42
30					

### 6. What percentage of occupancy is driven by the market segments below?



7. Please identify your top six leisure points-of-origin:

Leading leisure points-of-origin

POINT OF ORIGIN	# RESPONSES
New York	7
Metro NY/NJ	3
Lower Hudson Valley	2

Second top leisure points-of-origin

POINT OF ORIGIN	# RESPONSES
New Jersey	6
Buffalo/Syracuse	1
Massachusetts	1
CT/RI/NH	2
NYC	2

Third top leisure points-of-origin

POINT OF ORIGIN	# RESPONSES
Quebec/Canada	2
Pennsylvania	2
Massachusetts	3
New Jersey	3
Connecticut	2
Saratoga	2

Fourth top leisure points-of-origin

POINT OF ORIGIN	# RESPONSES
Hudson Valley	1
Massachusetts	5
Vermont	2
Connecticut	1
Albany	2
New York State	1

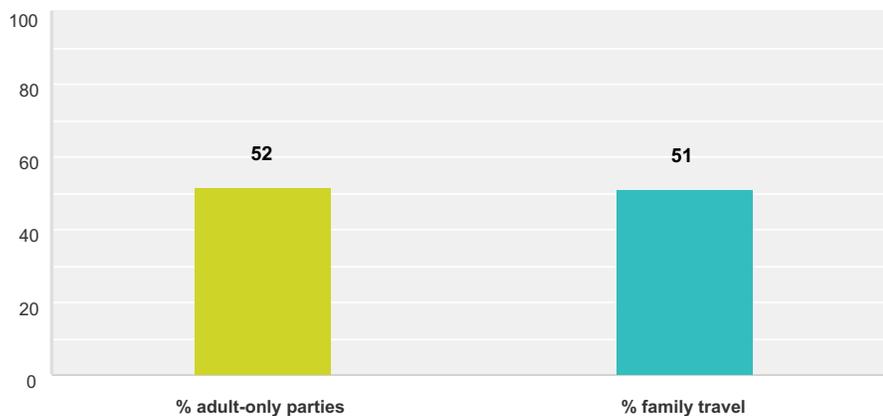
Fifth top leisure points-of-origin

POINT OF ORIGIN	# RESPONSES
Pennsylvania	3
Canada	2
Connecticut	2
Albany	1
New England	1
New York	1

Sixth

POINT OF ORIGIN	# RESPONSES
Montreal	2
Ontario	1
Massachusetts	1
International	1
Florida	1
Pennsylvania	2

8. What is your percentage of adult-only vs. family travel parties?



9. (For Hotels, Motels & Inns) please supply your 2009-2015 annual occupancy percentages by month

2014	Resp 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	32	21	41			38	29	8	
Feb	43	33	44			57	45	24	
March	41	27	52			30	23	19	
April	33	30	58			11	25	41	
May	45	40	66	10		15	20	49	20
June	57	68	71	40	60	17	51	52	40
July	79	88	77	95	100	47	78	91	80
August	95	99	94	95	98	59	84	96	90
Sept	50	50	63	25	50	28	69	44	40
Oct	50	43	59	15		31	72	38	20
Nov	33	23	42			8	44	18	
Dec	32	31	41			35	29	15	

2015	Resp. 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	31	29	39			54	55	23	
Feb	44	36	53			56	38	38	
March	38	30	54			42	21	22	
April	37	31	53			12	25	29	
May	49	46	61	10		15	39	48	20
June	73	63	70	40	60	24	45	62	40
July	77	85	80	95	100	47	68	85	80
August	92	96	92	95	98	61	73	96	90
Sept	60	52	67	25	50	40	69	52	40
Oct	67	41	67	15		28	82	53	20
Nov	38	26	48			16	29	27	
Dec	39	20	44			16	22	16	

**10. (For Hotels, Motels & Inns) please supply your average daily rates (ADR \$)**

2014	Resp 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	91-105	76-90	76-90			166-180	451-465	106-120	
Feb	91-105	91-105	76-90			166-180	451-465	106-120	
March	91-105	91-105	76-90			166-180	451-465	76-90	
April	76-90	91-105	76-90			166-180	451-465	76-90	
May	106-120	91-105	76-90	136-150		166-180	451-465	106-120	166-180
June	121-135	106-120	106-120	196-210	136-150	166-180	451-465	106-120	
July	166-180	136-150	136-150	196-210	241-255	166-180	451-465	181-195	
August	166-180	151-165	136-150	196-210	241-255	166-180	451-465	196-210	
Sept	106-120	106-120	106-120	151-165	136-150	166-180	451-465	151-165	
Oct	91-105	91-105	91-105	136-150		166-180	451-465	121-135	
Nov	76-90	76-90	76-90			166-180	451-465	106-120	
Dec	76-90	76-90	76-90			166-180	451-465	106-120	

2015	Resp. 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	106-120	91-105	76-90			166-180	451-465	76-90	
Feb	106-120	91-105	91-105			166-180	451-465	91-105	
March	91-105	76-90	91-105			166-180	451-465	76-90	
April	76-90	76-90	76-90			166-180	451-465	76-90	
May	106-120	106-120	91-105	151-165		166-180	451-465	106-120	181-195
June	121-135	106-120	106-120	196-210	136-150	166-180	451-465	166-180	
July	166-180	136-150	136-150	196-210	241-255	166-180	451-465	181-195	
August	166-180	151-165	136-150	196-210	241-255	166-180	451-465	196-210	
Sept	106-120	121-135	106-120	151-165	136-150	166-180	451-465	166-180	
Oct	91-105	106-120	76-90	136-150		166-180	451-465	106-120	
Nov	76-90	91-105	76-90			166-180	451-465	76-90	
Dec	91-105	91-105	76-90			166-180	451-465	91-105	

**11. Please supply your 2009-2015 revenue-per-available-room (RevPAR \$)**

2014	Resp. 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	26-30	16-20				51-75	106-120	6-10	
Feb	41-45	31-35				91-105	196-210	26-30	
March	36-40	26-30				46-50	51-75	16-20	
April	26-30	26-30				11-15	76-90	31-35	
May	46-50	46-50				21-25	151-165	51-75	
June	51-75	76-90				26-30	196-210	76-90	
July	121-135	121-135				76-90	331-345	151-165	
August	151-165	151-165				91-105	376-390	181-195	
Sept	51-75	51-75				51-75	416-330	51-75	
Oct	46-50	41-45				46-50	301-315	46-50	
Nov	26-30	16-20				11-15	166-180	16-20	
Dec	26-30	21-25				51-75	106-120	11-15	

2015	Resp. 1	Resp. 2	Resp. 3	Resp. 4	Resp. 5	Resp. 6	Resp. 7	Resp. 8	Resp. 9
Jan	31-35	26-30				91-105	181-195	16-20	
Feb	46-50	31-35				106-120	181-195	36-40	
March	31-35	26-30				51-75	76-90	16-20	
April	31-35	26-30				16-20	91-105	26-30	
May	51-75	46-50				21-25	136-150	51-75	
June	76-90	51-75				31-35	196-210	106-120	
July	121-135	121-135				76-90	271-285	151-165	
August	151-165	136-150				91-105	316-330	181-195	
Sept	51-75	51-75				51-75	316-330	76-90	
Oct	51-75	41-45				41-45	331-345	51-75	
Nov	31-35	21-25				21-25	106-120	21-25	
Dec	26-30	16-20				26-30	51-75	11-15	

**Notes:**

For those lodgings that provided statistics for 2009 through 2015, occupancy percentages have steadily increased, with an increase of 4 to 29 percentage points from 2009 to 2015.

ADR has increased overall 2009 to 2015 by 12% to 20%, though some properties reported a higher ADR during the peak summer months of 2012 and 2013, dropping slightly for 2014 and 2015.

Reported RevPAR \$ demonstrated the same fluctuations as ADR over 2011 to 2015, with an overall gain from 2009 to 2015 of 11 to over 55%.

Smaller, seasonal properties saw little or no lift in occupancy or ADR over the six years.

## 12. (For B&B's) How many employees do you currently have on staff?

- 0
- 0
- 1
- 0 Family owned and run
- 110
- 300+
- 0
- 1
- 0
- 8
- 3
- 2

## 13. How long have you owned your B&B?

There were nine responses to questions, ranging from 3 years to 30.  
(3, 12, 30, 18, 15, 13, 22, 11, 11 years)

## (For all respondents) What is your biggest challenge in marketing your property?

- Finding affordable ways to market to our target audience
- No challenges
- I do no advertising. Do not have a website. Same people, same cottage, same time every year. I even have a waiting list of people trying to get more time and one of new people trying to get in
- The Chamber is the biggest help. Have never heard from Warren County Tourism
- Distance from airport
- Poor sidewalks and roads in North Creek
- Price against other businesses
- Increasing costs of 3rd party book sites -seasonal variance
- Identifying best advertising/booking service
- Bus Groups have dwindled.
- Keeping up with the customer demands
- None
- Small property, small ad budget
- Our sales are very good for a small property, but even a generous % for an ad budget does not go very far.
- Our biggest challenge is the seasonality of the area. The lack of year round attractions and "Things to Do" continues to plague Warren County, as a destination choice during the non-peak tourist seasons. Improper use of bed tax revenue by county politicians makes Warren County's marketing efforts less effective than its comp set.

- FIGURING OUT THE BEST & MOST EFFECTIVE PLACE TO SPEND OUR ADVERTISING DOLLARS. I.E. TRIPADVISOR, WARREN COUNTY, LAKE GEORGE CHAMBER OF COMMERCE. THE MOST MONEY SPENT IS THROUGH BOOKING FEES FOR THIRD PARTY SITES I.E. BOOKING.COM EXPEDIA, HOTELS.COM Everyone wants us to advertise with them but the most effective place we see bookings coming in from would be third party websites.
- Financial limitations
- The diversity in advertising methods/choices used to be there were only a few ways to advertise. Now there are dozens and dozens, all expensive, all good.

### Future Sales / Marketing Suggestions for Warren County Tourism

- I think the County does a good job with marketing ... but I am not sure how much focus there is beyond Lake George.
- We need to do more to promote the region as a year round destination. We need trade shows, court more Canadians, and a blog on the region. Because we have such a diverse business group, I would suggest travel packages with suggested itineraries.
- Combine the CVB/Tourism department and have staff focusing on different segments. IE: Weddings, Social/Leisure, Group and Tours
- Concentrate more on the Adirondacks and less on Lake George. I know, Lake George is in the Adirondacks, but we are the gateway to the park.
- Promote region as a whole, incorporating activities from all towns/villages - utilize a professional, 3rd party entity to effectively use the program (remove from county functions) with accountability to the county
- Focus on unique features of each property
- Adding items in November and December.
- Put more emphasizes on summer to build out the fall and spring as overflow - Do not market fall and summer as much-it is wasted money
- Promote historical importance of area
- Continue marketing the entire county - the region is not only for winter
- I appreciated the leads specifically noting their looking for elopements and honeymoons as that is a very important piece of my business. We are too small to blanket our inquiries.
- 1.Establish an "Events Department" to create and amass new ideas, and see them to fruition. This department can assist with processing the bed tax applications. 2. Really embrace social media. Have a dedicated staff member use today's technology to monitor, any and all comments about Warren County, and respond to them. Post positive comments daily on blogs, face book, and other social media channels. Develop a younger generation following by using snap chat, and post pictures and video daily of Warren County. Look for all of these opportunities. Develop a Mobile Travel Planning App – Examples on following pages Benefits: 1. Engage the Millennial and technology driven market 2. Open the door to new marketing opportunities a. i.e. QR Codes for promotions and discounts b. new social media exposures 3. Trackable data to consistently analyze 4. Itinerary Creation capabilities - a must a. preset itineraries – (Historical, High Adventure, most popular, etc.) Work to unify Tourism – Look today at 2019 for direction Examples: 1. www.lakegeorge.com (Mannix marketing)

vs [www.visitlakegeorge.com](http://www.visitlakegeorge.com) (WCT) 2. Lake George Chamber, CVB, WCT – what role does each play? Clarify and Fund adequately the CVB 4. Direct Mail is too costly and is ignored today. Internet is 90% of research. 5. Get greatly involved in Social media – 68% of all travelers go to Trip Advisor when planning a trip (vacation). How many potential visitors looked at Lake George on Trip Advisor last week for vacation information? 6. New Website is very good. QR codes on downloadable brochures Bring visitors to special mobile interest Add a Live Chat feature on Website for instant answers

- Work on getting big annual events for May, Sept and Oct.
- Find a way to become the best and easiest way to advertise so we can stop doling out money to do many different places.

### Anything else you would like to add?

- The bed tax money should go directly back to marketing the region, that is what is was intended for across the country. I would suggest partnering with DMAI ( Destination Marketing International ) for advice on specific tool boxes that many other counties in the Tri-State region have found helpful.
- Signage on Rt 28 to direct tourists onto Main St.
- Recognize OCC tax dollars used properly to promote the region well (while) driving sales and property taxes. Do not continue to micromanage and split opportunities into smaller and smaller pieces without any consistent accountability on proof of return on investment. Note: expenses are increasing at a faster rate than revenue streams as well. Payroll, health insurance, property taxes, etc.
- Get a video of the area and all of the property owner's websites to promote the area better
- It hurts to only be able to choose the "Lake George Region" as who we are. Although Lake George itself is an amazing magnificent lake, people know Lake George as Lake George Village. Our customers are not looking for Lake George Village. They are looking for adventure in the beautiful forest and the peace of the mountains. I would like to see the Lake George/Adirondack Region.
- I appreciate the effort to include all of Warren County and the focus of natural activities such as hiking, biking, boating, etc. vs the focus on Great Escape, Waterslide World, etc. I believe our natural landscape provides the best option for tourism promotion in today's world.
- Warren County and the Lake George region suffer from low occupancies during the shoulder and off seasons. - Warren County has the greatest amount of rental units among its comp set - The bed tax monies are managed differently from the original vision, intent, and the way our competing counties organize themselves. The business community has many ideas to increase the volume of visitors during the slower periods. Special events, recognized themed days and weeks, concerts, sporting happenings, etc., would increase occupancies and taxes revenues during these off seasons. There is currently no "organized" format to present, form, and cultivate them. Our tourism efforts are fragmented and less effective than other competing counties.
- Apply surplus Occ. Tax revenue to the village of Lake George so they can eliminate the parking meters. It's one of the biggest complaints we get and instead they seem to ignore this and keep adding new meters.

- Please bring back free placements + plastic bags. They were wonderful! Also, Great job everyone. We have the best local tourism agency in the state!

### Verbatim Responses from interviews with lodging partners

- Year round strategy is ESSENTIAL
- Planning to deal with new hotels at exits 17 and 18 is essential. The whole Northway is one theater – large scale increase in lodging properties in one place drains everyone's occupancy.
- Lower tier properties are affected the most negatively.
  - ◇ "Mom and Pops" are sliding over to AirBNB, housing foreign students, or are being sold to developers who replace them with one or two large single-family homes
  - ◇ Lower tier hotel properties are struggling, and their occupancy is falling
- Upper tier properties are holding their own FOR NOW. However, if extensive lodging property building continues, without long-range foresight, then the negative impact on properties of ALL tiers will be considerable.
  - ◇ For example, Great Escape Lodging has been forced to slash its package rates to stay competitive – lowering their ADR, revenue, and hotel tax for the county.
- Planning is ESSENTIAL. The County should not consider building any more low amenity hotels
  - ◇ Any new properties built should be planned within a strategy for attracting year-round visitors and establishing the property as a resort destination.

# 4. Visitor Profile Report

## Visitor Survey Research Methodology

Purpose: to document the profile and planning preferences of those who visit Warren County, New York. The survey captures the perceptions of Warren County as a destination, and the attractors that induce day trips, overnight visits, multiple night-stays, and repeat visitation.

Warren County Tourism provided BBG&G with their database of visitor inquiries. Email recipients were invited to take a Warren County visitor survey and be entered into a chance to win a drawing for a signed and framed Carl Heilman canvas print of scenic Lake George, valued at \$250.

An online survey invitation was distributed by email to 121,222 inquirers, 2,546 of those email addresses bounced and 2,562 opted out of the survey. Therefore a total of 116,114 surveys were received by the inquirers and 2,950 responded by taking the survey representing a 2.5% response rate. 169 surveys were completed by year-round and part-time residents who described those who visited them in Warren County during the year. Therefore this report provides data specific to the 2,781 respondents identified as visitors to Warren County.

## Visitor Survey Data Summary

The following data points summarize the typical profile of those visitors to Warren County, New York

- 75% of respondents have visited Warren County; 5.73% were full or part-time residents, 3% were residents of neighboring counties, and 16% expect to visit.
- 52% of respondents were from the state of New York, followed by NJ, CT and PA. 6% of respondents were from Canada.
- The demographic profile of visitors is more heavily adults-only couples (61% of all visitors).
- The average age of female respondents was 51, the average age of males, 56.
- Warren County travelers are well-educated, 83% has some level of college education, at least 59% has a college degree or higher.
- Repeat visitors – over 85% or more of each segment has been to Warren County more than once. 25% of repeat visitors have visited six or more times.
- In advance planning – over 25% of travel is planned 2-3 months before the trip, 12% 4-5 months before travel, and over 16% 6 months or more in advance. 20% of travel is booked 1 month before.
- Adults-only travel parties represent 61% of your overnight visitors; 39% of your overnight travel parties were comprised of adults traveling with kids.

- Residents and part-time residents reported that a majority of their friends and relatives travel parties consisted of 0-5 adults (87.5%) and 0-5 children (90.32%), whose primary activities consisted of shopping, boating and water sports, sightseeing, and swimming.
- 61% of travel parties were comprised of 2 (41%) or 4 people (20%). 12.46% indicated they traveled with a pet. Overnight visitors primarily enjoyed shopping, driving/sightseeing, swimming & water sports, boating, and local dining.
- Respondents were primarily overnight visitors (78%) versus day-trippers (22%).
- The Factory Outlets of Lake George, Lake George Steamboat Cruises, Fort William Henry, and Great Escape appealed the most.
- Over 98% of all travel segments would recommend Warren County to others while over 91% plan to visit again in the near future.
- How did you first hear about Warren County/Lake George: Previous knowledge (66.23%); Friends & family referral (42.29%); Internet search (19.24%); Visit Adirondacks brochure (15.51%), NY State Travel Guide (12.67%), W.C.T. Travel Guide (10.85%); W.C.T. Brochure (5.96%); TV advertisement (4.8%); AAA/Fodors/Zagat guidebooks (4.38%) Magazine advertisement (3.77%); and Print ad (3.31%).
- For those respondents who have not yet, but hope to visit Warren County, they first heard about Warren County: Friends & family referral (34.86%); Internet search (31.80%); Previous knowledge (26.91%); NY State Travel Guide (16.82%); Visit Adirondacks brochure (12.54%), Magazine advertisement (7.95%); TV advertisement (7.03%); AAA/Fodors/Zagat type guidebooks (6.42%); W.C.T. Travel Guide (3.67%); W.C.T. Brochure (3.06%); Print ad (2.75%).
- Trip planning sources: Previous knowledge (63.32%); www.VisitLakeGeorge.com (55.52%); www.visitadirondacks.com (22.78%); Travel websites (17.65%); Visit Adirondacks Travel Guide (16.67%); W.C.T. Travel Guide (13.88%); www.lloveny.com (12.25%); Facebook (11.5%); AAA/Fodors/Zagat type guidebooks (7.64%).
- For those respondents who have not yet, but hope to visit Warren County, trip planning sources included: www.VisitLakeGeorge.com (69.11%); www.visitadirondacks.com (32.72%); Travel websites (31.80%); W.C.T. Travel Guide (26.30%); www.lloveny.com (25.99%); Visit Adirondacks Travel Guide (22.94%); NY State Travel Guide (22.63%); AAA/Fodors/Zagat type guidebooks (17.13%); State Welcome Center (15.29%); Facebook (12.54%); Previous knowledge (11.62%).
- Had you traveled to or through Warren County/Lake George before: No (14%) indicates first time visitors.
- The months of June through September were most popular for visits to Warren County/Lake George
- The vast majority of visitors were leisure visitors (86.76%) coming for general relaxation (41%), outdoor recreation (17.46%), other recreation (12.01%) visiting friends and relatives (6.7%) or passing through as part of a longer trip (6%).
- The overall Warren County/Lake George experience rated highly at 4.5 on a five-point scale.

## WARREN COUNTY VISITOR PROFILE – OVERALL

### 1. Have you visited Warren County/The Lake George Area? (choose ONE answer)

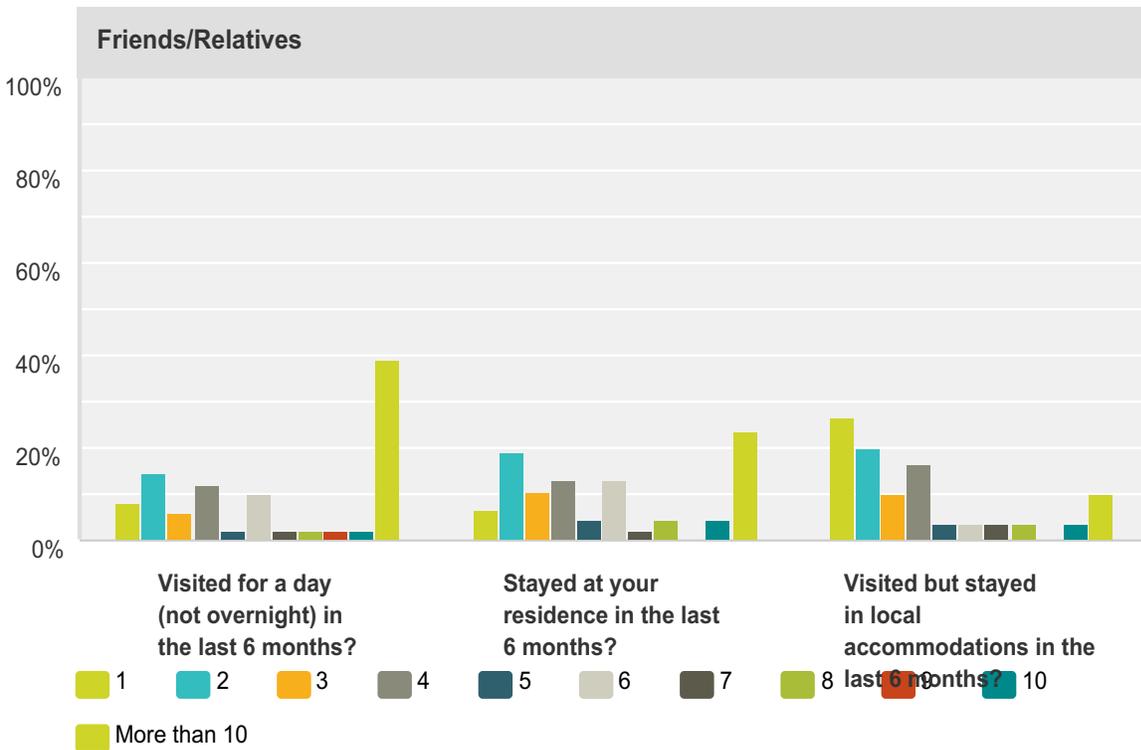
Answer Choices	Responses	
I am/was a visitor to Warren County/The Lake George Area	75.11%	2,215
I am a year-round resident of Warren County/The Lake George Area	3.19%	94
I am a part-time resident of Warren County/The Lake George Area (live or visit part of the year)	2.54%	75
I am a year-round resident of a neighboring county (Essex, Hamilton, Saratoga, Washington, or Vermont)	3.02%	89
I would like to visit Warren County/The Lake George Area	16.14%	476
<b>Total</b>		<b>2,949</b>

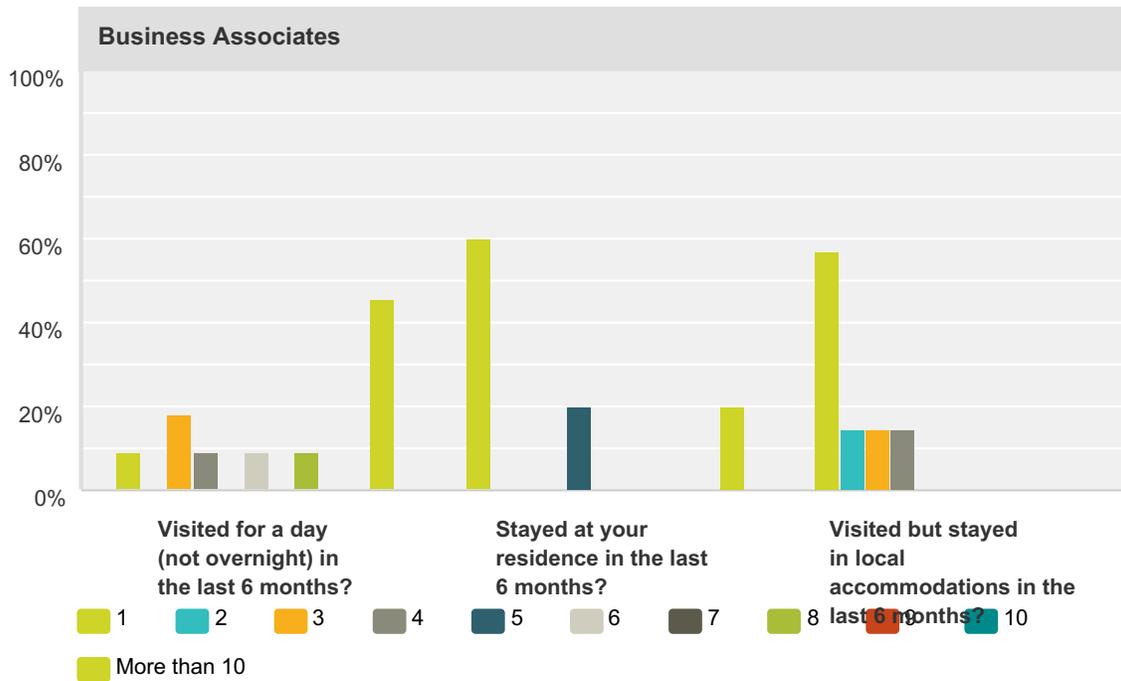
## RESIDENT SURVEY

### Please tell us about your residency in Warren County/The Lake George Area:

Fifty-six respondents answered the question, "How long have you lived in Warren County/The Lake George Area," with number of years ranging from 1 to 65 years. The average number of years is 26.

### How many friends, relatives and business associates visited you in the last 9 months?

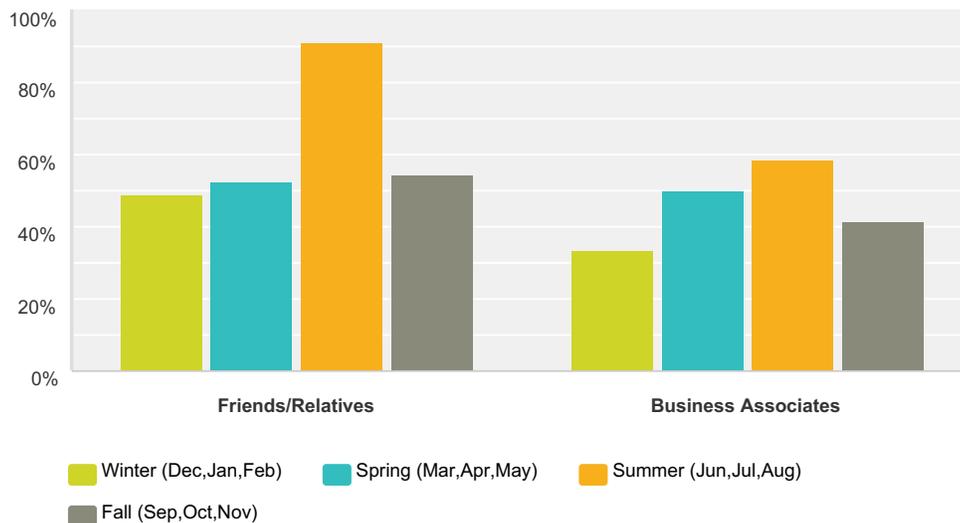




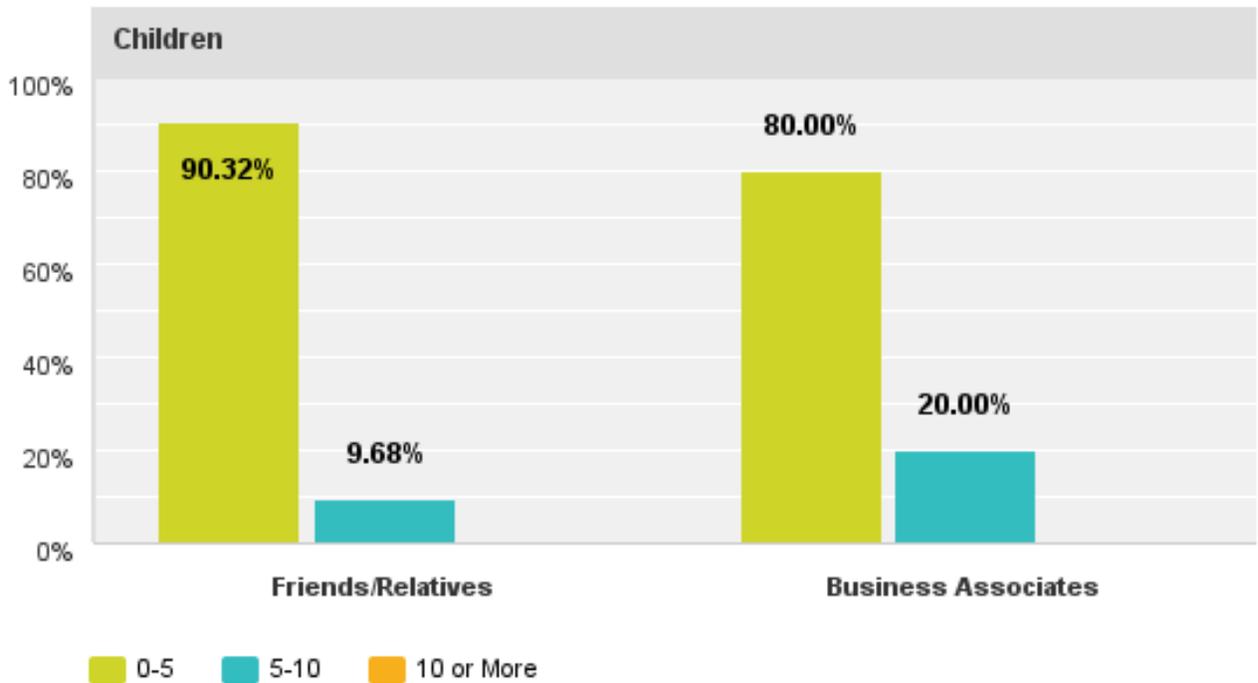
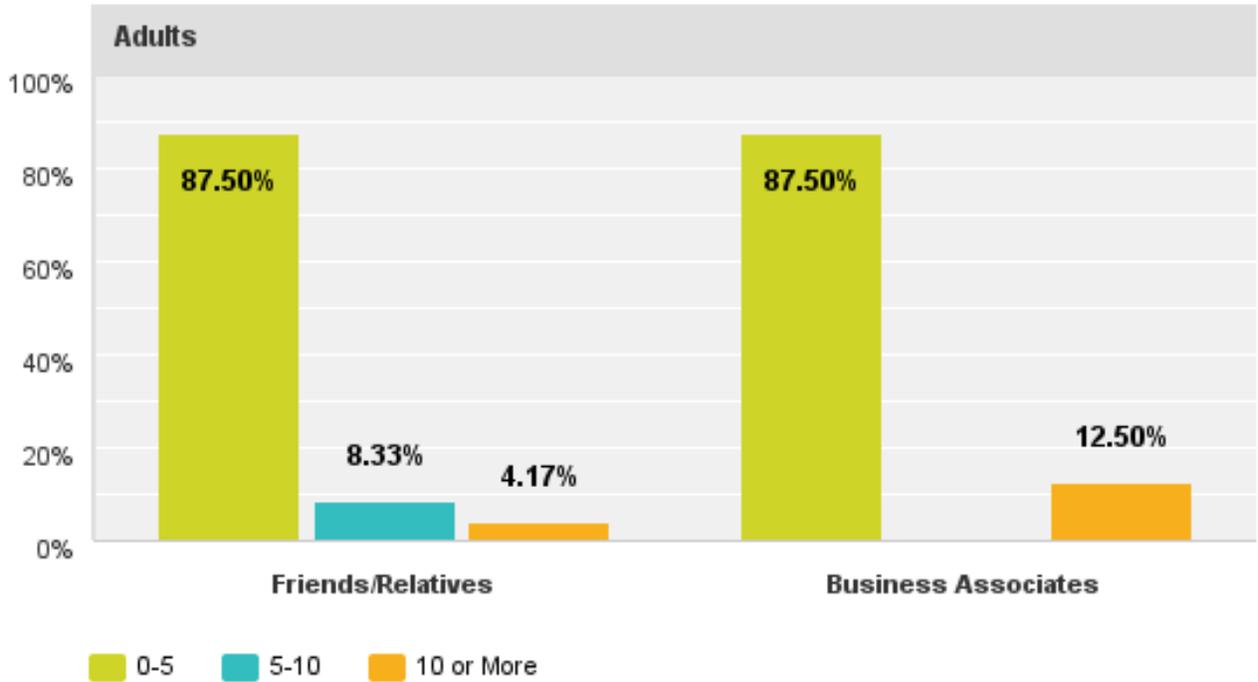
### What is the average number of nights your guests stay with you while in Warren County/The Lake George Area?

- Fifty-four respondents answered this question, with answers ranging from 0 to 14 nights for Friends and Relatives (average length of stay was 4 nights).
- Twenty-six respondents answered this question, with answers ranging from 0 to one week for Business Associates (average length of stay was 1 night).

### Think about friends, relatives or business associates who visited you in the last 9 months. In what season(s) did they visit?



What is the typical party size of visitors who stay overnight with you in your residence?



## When visiting you, what other activities did your guests do?

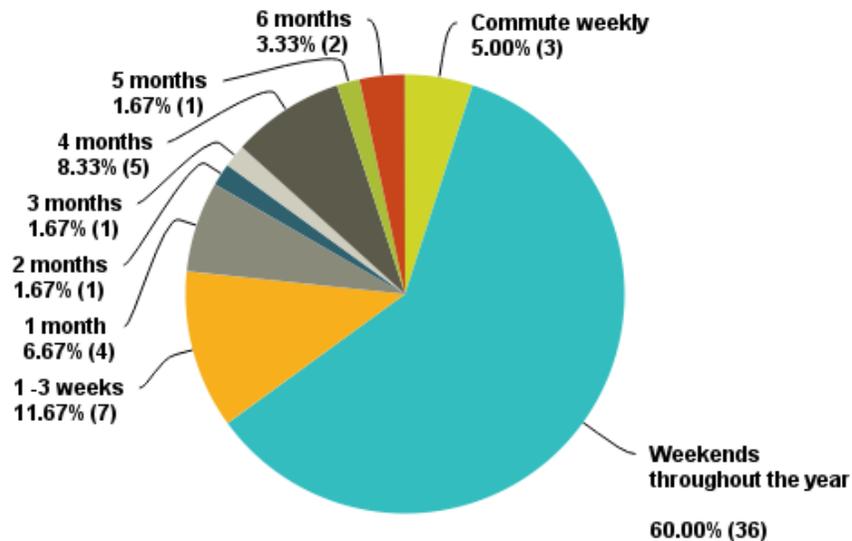
Answer Choices	Responses	
Shopping	70.69%	41
Boating and Water Sports	56.90%	33
Driving/sightseeing	55.17%	32
Swimming	51.72%	30
Fine or local culinary dining	48.28%	28
Farmers markets/U-picks	44.83%	26
Festival/event	44.83%	26
Visited other friends & relatives	36.21%	21
Historic site/museum	34.48%	20
Concert/live performance	32.76%	19
Hiking	31.03%	18
Antique shopping	29.31%	17
Family reunion	27.59%	16
Fishing	27.59%	16
Sleep late/take a nap	27.59%	16
Wine & Brew Trail	25.86%	15
Camping	24.14%	14
Skiing	24.14%	14
Biking/cycling	18.97%	11
Golf	18.97%	11
Art venues, galleries, studios	13.79%	8
Sports event	13.79%	8
Wedding	12.07%	7
Other (please specify)	12.07%	7
Motorcycle riding	10.34%	6
Hunting	8.62%	5
Meeting/conference/training	8.62%	5
Bird watching	6.90%	4
Business	6.90%	4
Did nothing	5.17%	3

## PART-TIME RESIDENT SURVEY

### Where is your other part-time residence?

There were 60 responses to this question. Thirty-eight stated they were from New York; from a variety of locations including the Albany area, eleven from other towns in Warren County, five from the Hudson Valley, and one each from Brooklyn, Staten Island, and Long Island,

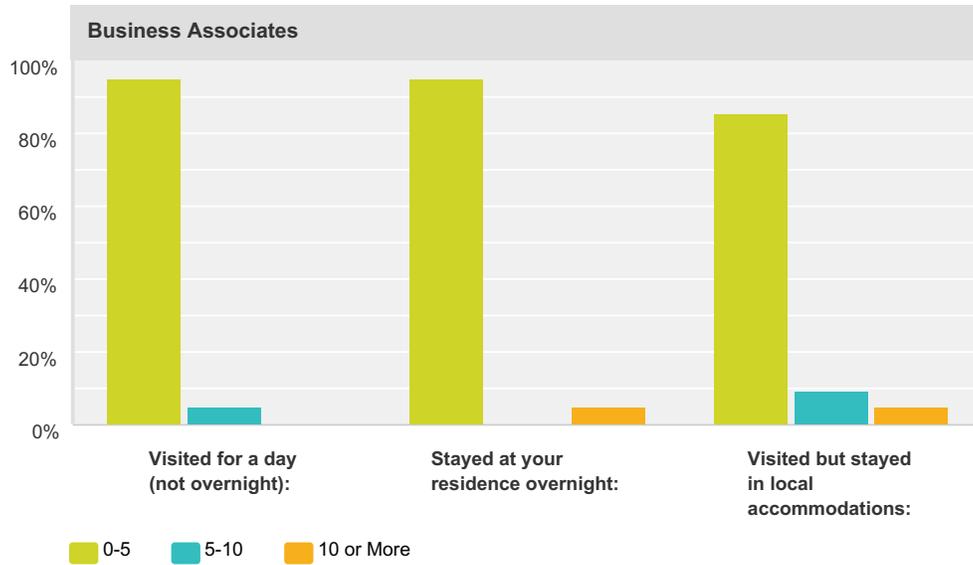
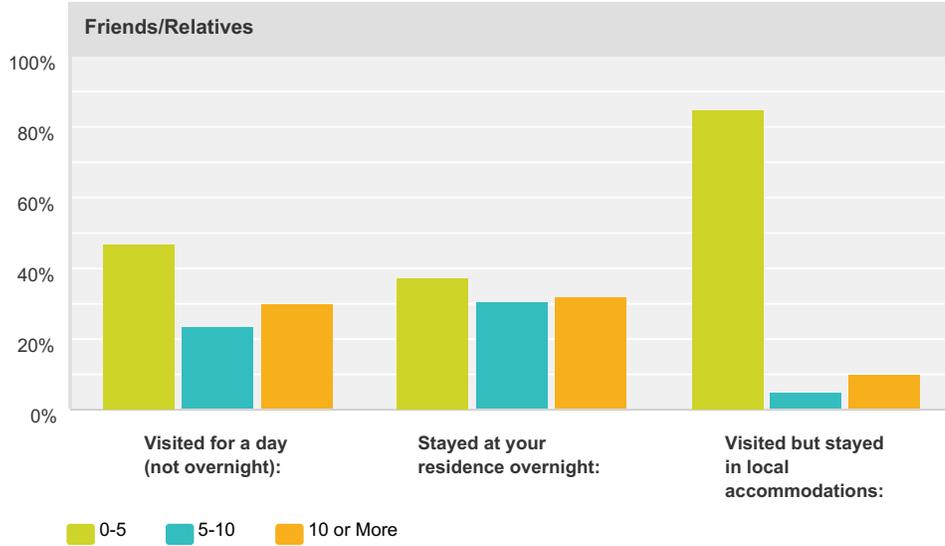
### What is your typical length of stay in Warren County/The Lake George Area?



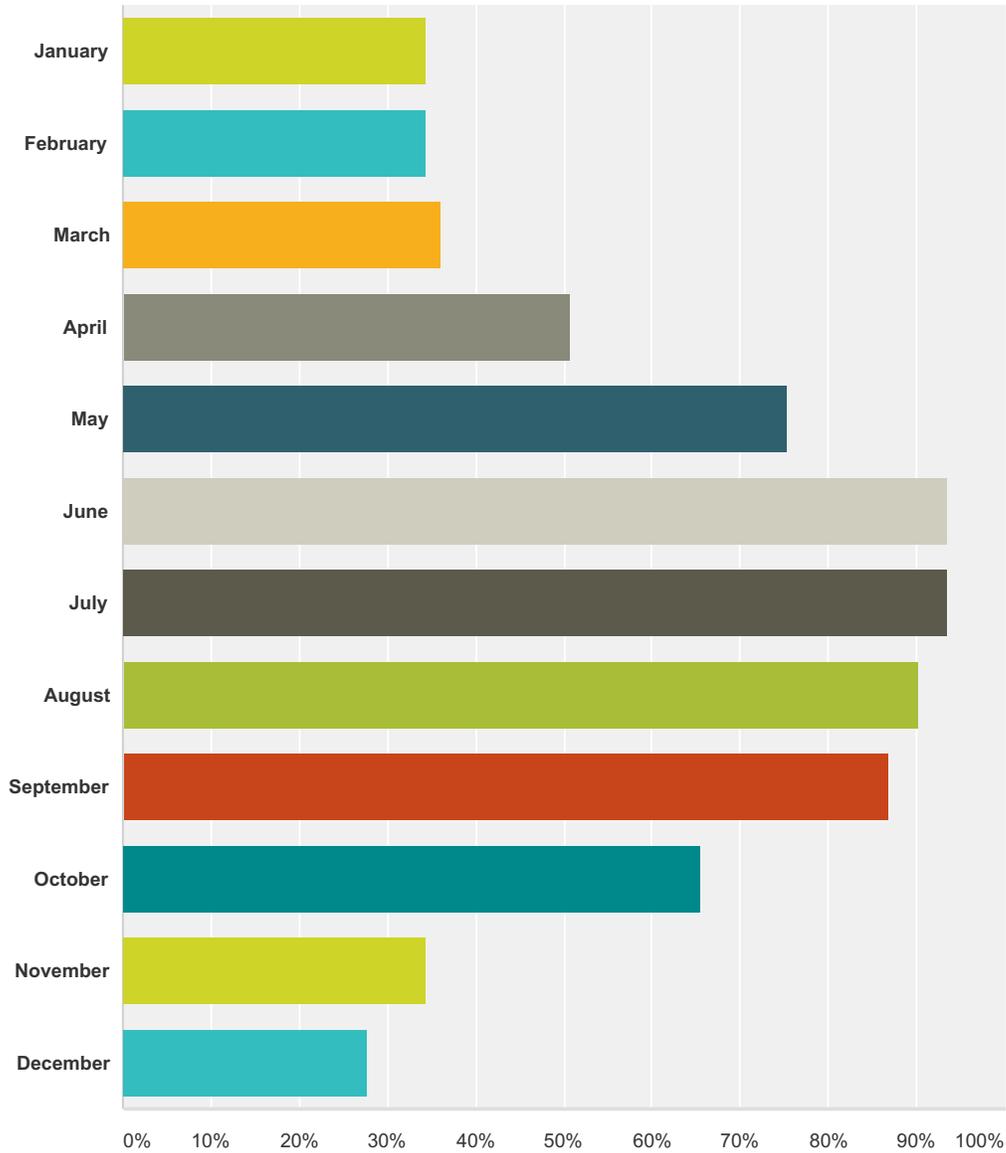
### How long have you been coming to Warren County / The Lake George Area and staying part of the year?

Sixty-one respondents answered this question and answers ranged from 1 to 71 years. The average number of years was 23 years.

How many friends, relatives, and business associates visited you during your stay in Warren County/The Lake George Area?



Which months of the year do you typically stay in Warren County/The Lake George Area? (Check all that apply)



## VISITORS TO THE WARREN COUNTY/THE LAKE GEORGE AREA

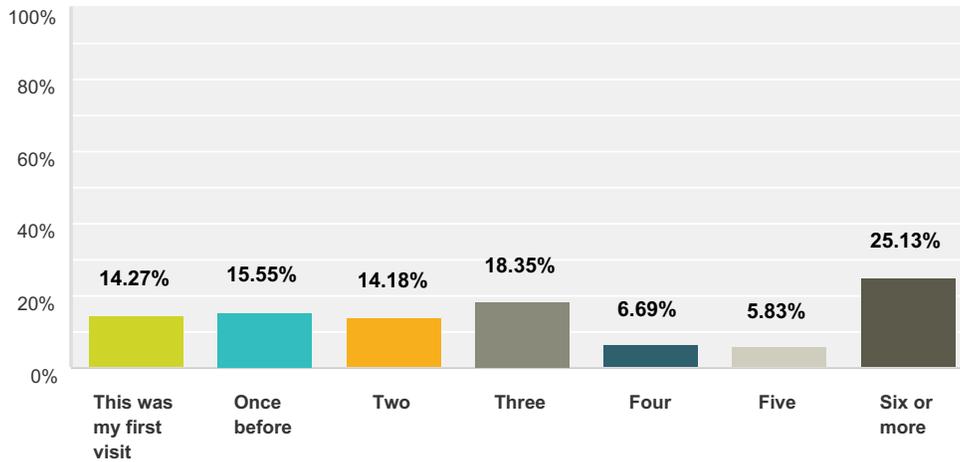
Related to this trip, how did you first hear about the Warren County/The Lake George area? (Choose ALL that apply)

Answer Choices	Responses
Previous knowledge	66.23%
Friends/family referral	42.29%
Internet search	19.24%
Visit Adirondacks brochure	15.51%
NY State Travel Guide	12.67%
Warren County Travel Guide	10.85%
Warren County Brochure	5.96%
TV advertisement	4.80%
AAA/Fodors/Zagat type guidebooks	4.38%
None applicable	4.10%
Magazine advertisement	3.77%
Print ad	3.31%
State welcome center	3.26%
Magazine/newspaper story	2.65%
Work/conference/event provided	1.77%
Adirondack Craft Beverage Trail	1.44%
Radio	1.02%
<b>Total Respondents: 2,147</b>	

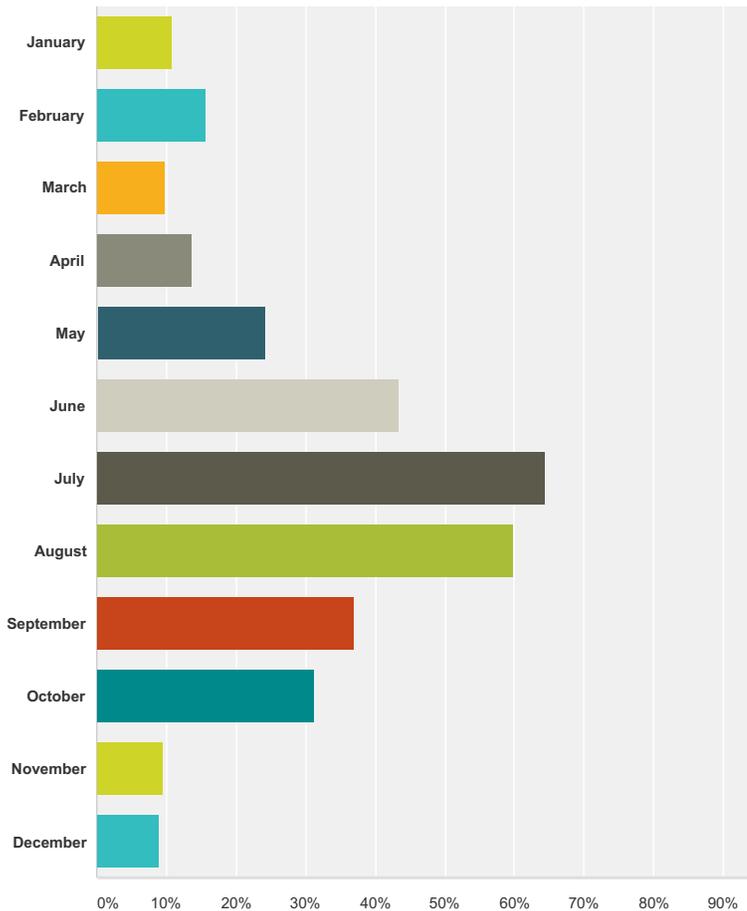
What information or trip planning sources did/would you use to plan your most recent trip to Warren County/The Lake George Area? (choose ALL that apply)

Answer Choices	Response
Previous knowledge	62.30%
www.VisitLakeGeorge.com	55.55%
www.visitadirondacks.com	22.79%
www.ILoveNY.com	12.26%
Facebook	11.46%
Travel Sites (Trip Advisor, Travelocity, Orbitz, etc.)	17.66%
Warren County Travel Guide	13.89%
White Water Rafting Adventure Guide	2.28%
Visit Adirondacks Travel Guide	16.68%
Adirondacks Fishing Guide	3.59%
NY State Travel Guide	10.48%
AAA/Fodors/Zagat type guidebooks	7.64%
Adirondack Craft Beverage Trail Guide	2.56%
State welcome center	5.36%
Work/conference/event provided	1.03%
None applicable	5.03%
<b>Total Respondents: 2,146</b>	

How many times have you visited Warren County/The Lake George Area in the last three years?



Check all the months in which you have visited Warren County/The Lake George Area. (check all that apply)



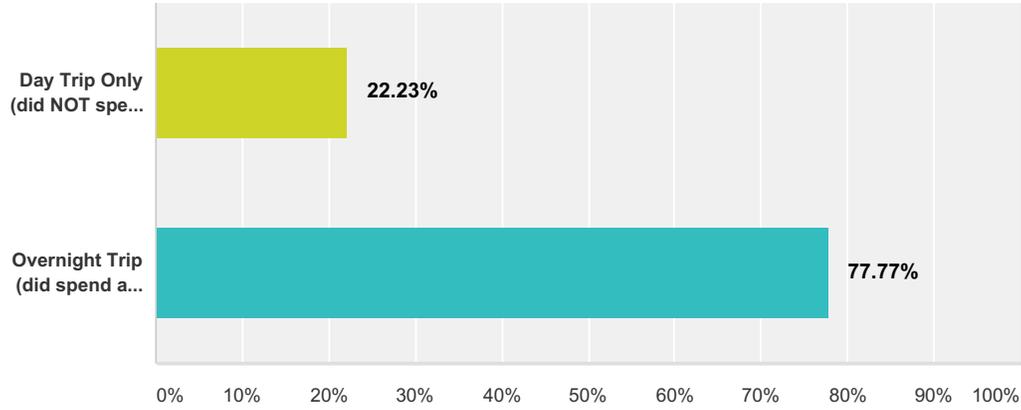
## What was the MAIN purpose for your most recent trip to Warren County/The Lake George Area?

Answer Choices	Responses	
Leisure (visited area attractions/events, shopping, culinary, winery, etc.)	86.86%	1,877
Family related (visit friend/family, attend an event, graduation, etc.)	8.98%	194
Team sports event / tournament (recreation, children & adult leagues, etc.)	1.57%	34
Group tour / motorcoach	0.56%	12
Business	1.02%	22
Conference / meeting	1.02%	22
<b>Total</b>		<b>2,161</b>

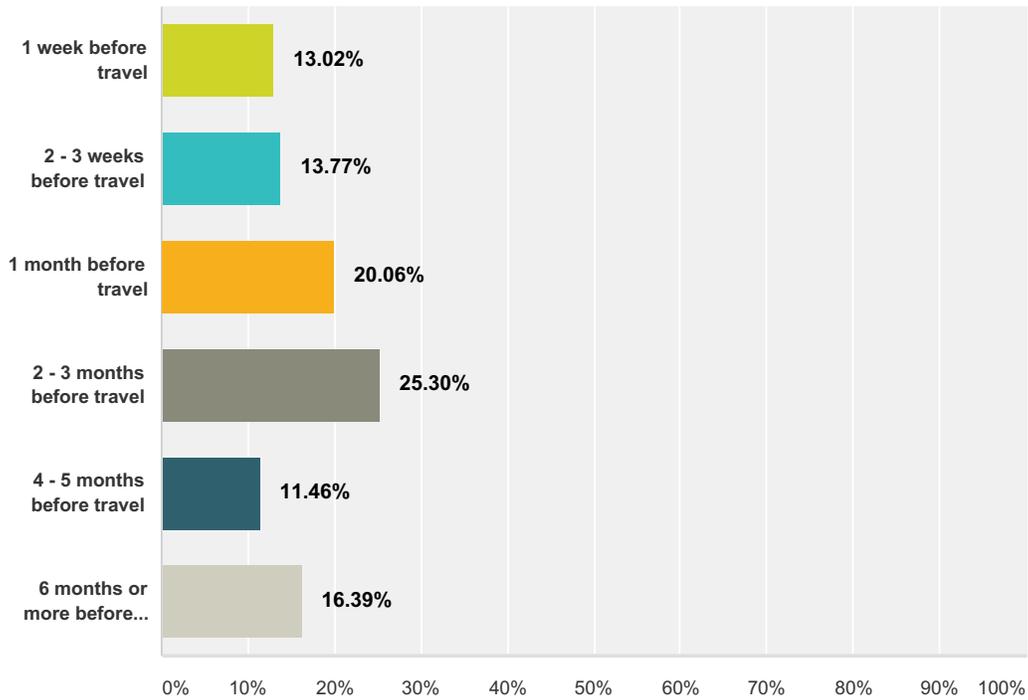
## Please categorize the PRIMARY purpose for your LEISURE trip to Warren County/The Lake George Area? (check ONLY one)

Answer Choices	Responses	
General relaxation	40.69%	874
Outdoor recreation (biking, hiking, fishing, boating, etc.)	17.46%	375
Other (please specify)	12.01%	258
Visiting friends and relatives	6.70%	144
Overnight as part of longer trip - passing thru	6.05%	130
Attend a festival / event / concert	5.31%	114
Shopping	4.89%	105
Historic sites / museums	3.68%	79
Reunion / wedding	1.02%	22
Wineries/Brew Pubs	0.98%	21
Attend a sporting event (recreation, college, etc.)	0.98%	21
Arts venues, galleries, studios	0.19%	4
Attend theatre	0.05%	1
<b>Total</b>		<b>2,148</b>

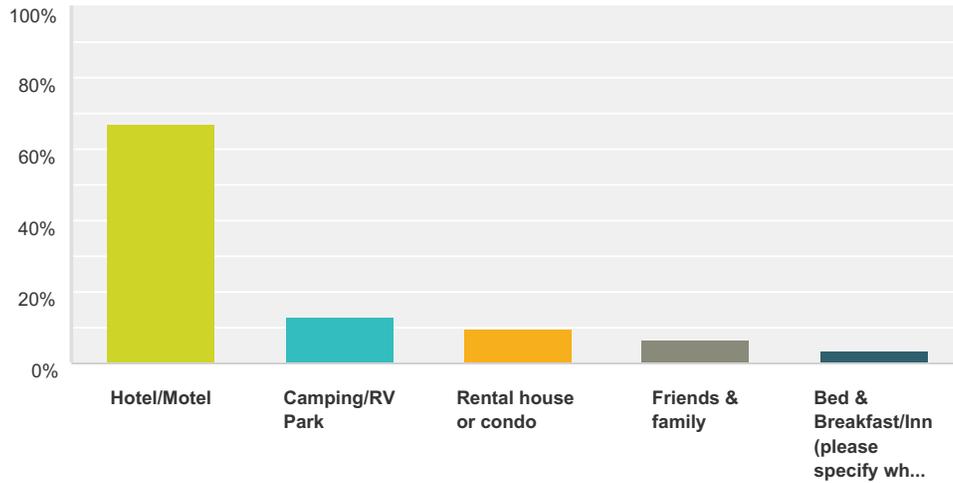
Was your most recent trip to Warren County/The Lake George Area a:



How far in advance did you book your accommodations for your most recent trip to Warren County/The Lake George Area?



Where did you stay during your last visit to Warren County/The Lake George Area? (please select one)



Please identify the hotel/motel where you stayed on your LAST visit to Warren County/The Lake George Area. (Choose one from the list below)

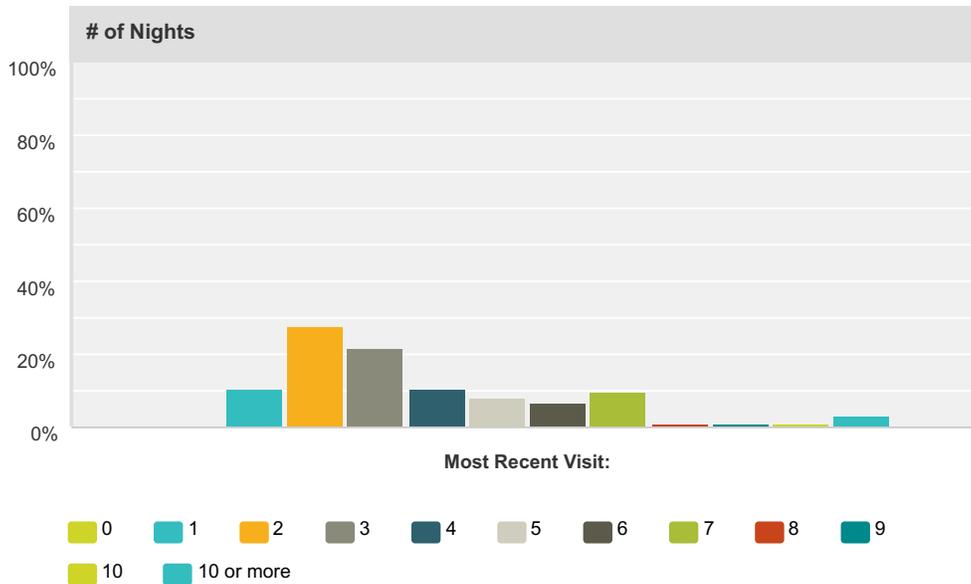
Answer Choices	Responses
If hotel/motel is not on this list (please specify)	42.73%
NYS Campgrounds	5.90%
Holiday Inn	4.65%
Comfort Suites	3.93%
Hampton Inn	3.74%
Fort William Henry	3.67%
Surfside	3.34%
Quality Inn of Lake George	3.21%
Sagamore	2.88%
Lake George RV Park	2.88%
Country Inn & Suites	2.23%
America's Best Value Inn & Suites Injkm Best Western	2.16%
Georgian	2.10%
Six Flags Lodge	2.03%
Marine Village	1.97%
Scotty's Lakeside Resort	1.51%
Super 8 Warrensburg	1.38%
Tiki Resort	1.18%
Travelodge of Lake George	1.18%
Clarion	1.11%
Lodges at Cresthaven	0.92%
Alpine Lodge	0.85%
Queensbury Hotel	0.85%
Trout House Village	0.79%
Capri Village	0.66%
Northern Lake George Resort	0.39%
Ramada Inn/Queensbury	0.39%
Dunham's Bay Resort	0.33%

If hotel/motel is not on this list (please specify) – Responses

Lakeview cottages	Gentlemen Johnny , the worst place ever,
we rented a house	but I will still go to Lake George
Depe Dene	Lake Haven
O’Sullivan’s	Lake George Inn
Sundowner motel	O Sullivans
Colonel hotel and resort	The Admiral
Family owned cottage	Clinton Inn
Do not remember	Twin Birches
Super 8	Motel 6. They take pets
Greenhaven resort	Adirondack Gateway campground
Budgetel	Brookside Motel
Harrisburg Lake Lodge	My home
I stayed at Super 8 Ticonderoga	I do not recall name
Econolodge	Relative’s summer home
7 dwarfs	Boathouse Inn B&B
The Lake George Bed and Breakfast	Canoe island lodge
Econo Lodge in Glen Falls!	Do not remember
Motel 6 Lake George	Chelka Lodge
Don’t remember	Don’t remember.
the Juliana	House
Best western	Chelka lodge
Canoe island lodge	Admiral motel
Fran cove	Great escape campground resort
Private residence	Private campground
King Phillips and Adirondack Camping Village	Lake Haven
O’Sullivan’s on the Lake Motel	Rogers rock camping
Uncle bob cabin	Bolton pines motel
Blue lagoon resort	Bonnie View
King George RV Park	Wingate
Porter’s Cottages	Candle light cottages
Wingate	Don’t remember name
Washington County Fairground	Best western & Wyndham
It is now called Lake Haven. Don’t remember what it was called then, but Lake Haven doesn’t sound familiar	Lake haven motel
Pine Grove motel	the Irish inn
	Wyndham by Wingate Rt 9
	Was many years ago, I do not remember
	Econolodge

Adirondack Adventure Resorts  
Hearthstone Camp Ground  
B&B  
Moose Hillock Campground  
O'Connor's Cottages  
Green harbor condo  
The flamingo  
Super 8 Warrensburg - They take dogs and are very clean.  
Don't remember  
Pinebrook motel  
own home  
Camp Wagmore  
Cronin's  
Don't remember  
Don't remember  
Acorn lodge  
Angel Rock rental home  
Econo lodge or quality inn glens falls  
Rather not say but it was great  
The Juliana  
Hill view  
Super 8 Lake George  
Moose Hillock campground  
Nordiks  
TWIN BIRCHES  
Lake crest  
I do not remember  
I honestly don't remember the name of the hotel  
Brookside motel

How many nights did you stay in Warren County/The Lake George Area on your most recent visit?



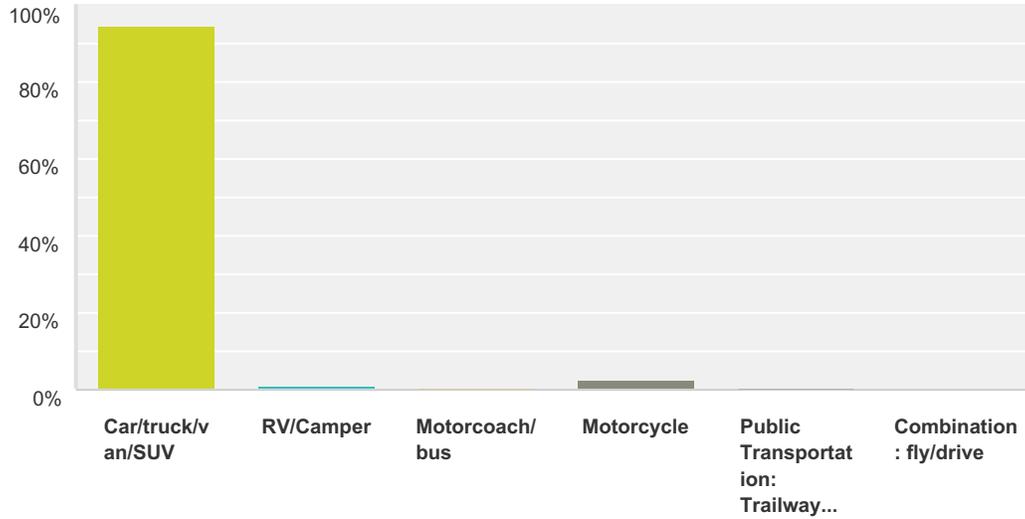
How much did you pay for your lodging/accommodations WHILE IN Warren County/The Lake George Area? Note: Please provide in whole numbers only. Do NOT include dollar sign or cents when entering this data. Example: enter 50, not \$50, not \$50.00

There were 1580 responses to this question and answers vary from \$50 to \$300 per night; from hundreds to \$8,000 per trip. The average cost for lodgings per stay was \$ 480.

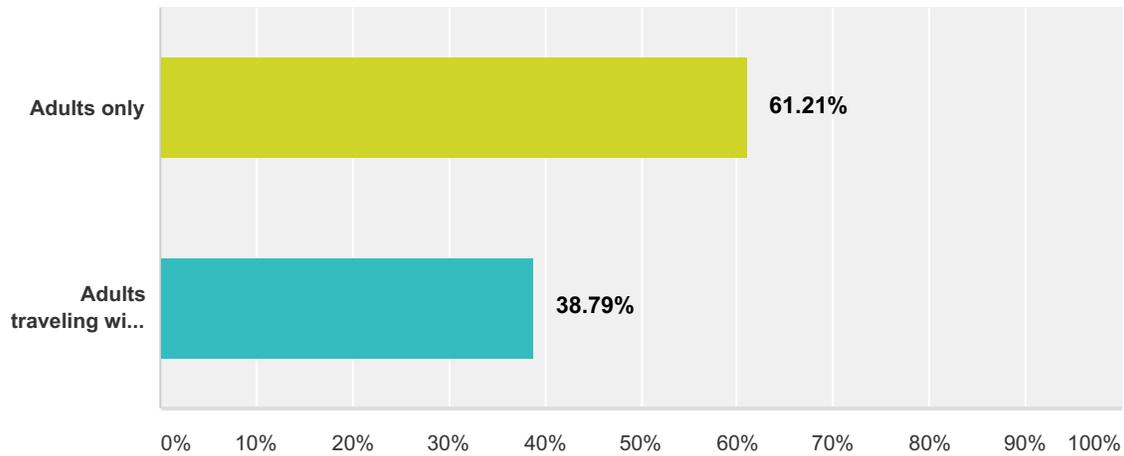
How much did your party spend WHILE IN Warren County/The Lake George Area? Provide TOTAL costs for your stay, not daily expenditures. NOTE: If you spent NOTHING in any category, please leave it blank. Please provide your other trip expenditures for your last visit to Warren County/The Lake George Area in whole numbers only. Do not include dollar signs or cents when entering this data. Example: enter 50, not \$50, not \$50.00

This question had 1912 respondents answer. The average spend on meals was \$ 270; on attractions \$ 265; on shopping \$ 390; and on transportation \$ 85.

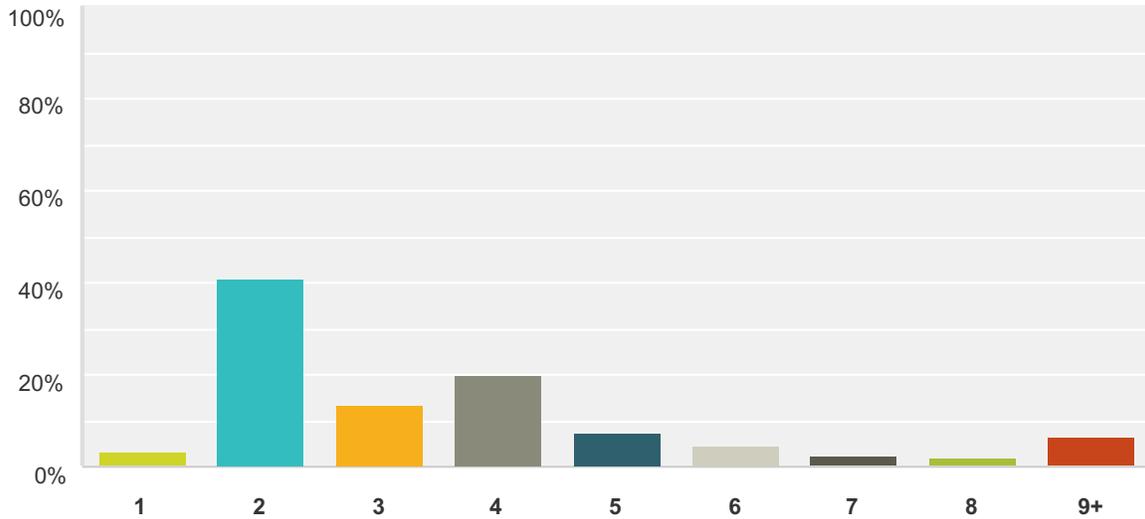
What mode of transportation did you use to get to and around Warren County/ The Lake George Area?



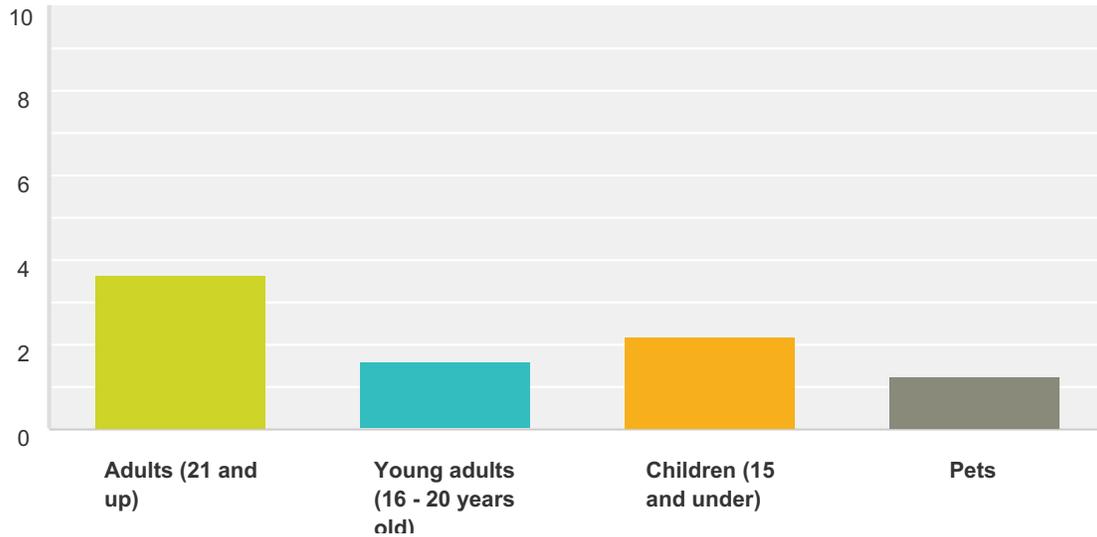
Was your travel party comprised of:



What was the total number of people in your travel party?



Now, please tell us the number of people in each age category in your travel party, as you reported in the previous question. Also include if you traveled with any pets. (Include only those traveling with you, not large groups)



What community was the PRIMARY destination of your visit to Warren County/  
The Lake George Area? (Choose ONE)

Answer Choices	Responses
Lake George	65.60%
Bolton Landing	5.92%
Adirondack	4.67%
Queensbury	3.91%
Other (please specify)	3.10%
Diamond Point	3.04%
Glens Falls	2.93%
Warrensburg	2.77%
Lake Luzerne	1.96%
Chestertown	1.41%
North Creek	1.03%
Hague	0.98%
Brant Lake	0.87%
Stony Creek	0.49%
Silver Bay	0.38%
North River	0.27%
Pottersville	0.22%
Johnsburg	0.16%
Thurman	0.16%
Athol	0.05%
Bakers Mills	0.05%
<b>Total</b>	

What other communities did you visit while in Warren County/The Lake George Area? (Check ALL that apply)

Answer Choices	Responses
Lake George	48.59%
Bolton Landing	42.55%
Glens Falls	40.41%
Queensbury	36.52%
Warrensburg	24.14%
Diamond Point	18.98%
Lake Luzerne	17.35%
Adirondack	14.58%
North Creek	7.98%
Hague	5.72%
Chestertown	5.59%
Brant Lake	4.27%
Pottersviller	3.46%
Stony Creek	2.83%
Silver Bay	2.20%
North River	2.14%
Thurman	1.76%
Bakers Mills	0.88%
Athol	0.69%
Johnsburg	0.57%
<b>Total Respondents: 1,591</b>	

Check all activities you or a member of your travel party did while visiting Warren County/The Lake George Area. (Check ALL that apply)

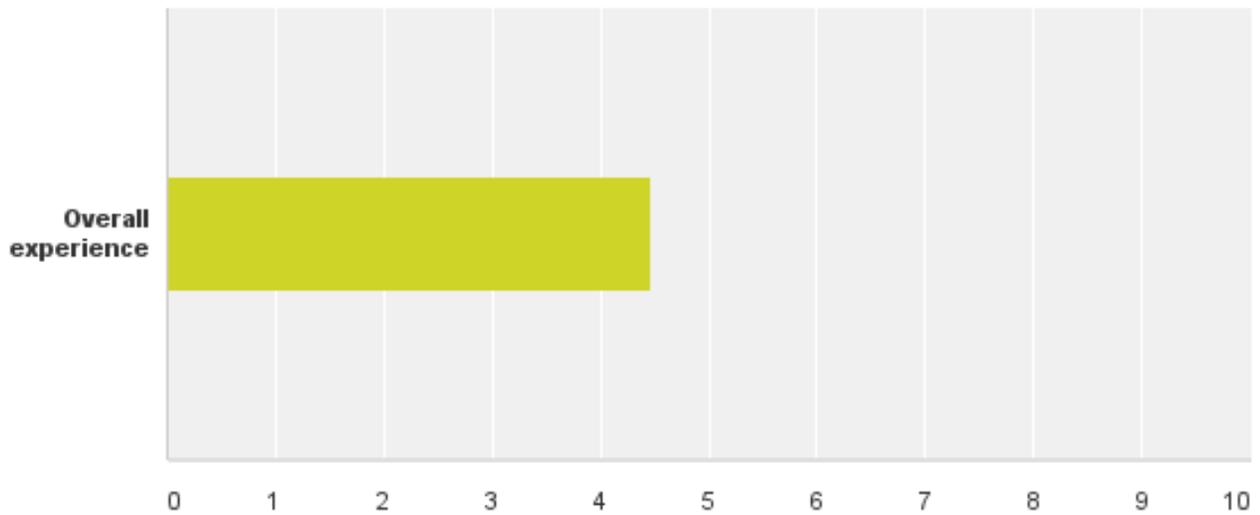
Answer Choices	Responses
Shopping	62.28%
Driving/sightseeing	50.89%
Swimming & Water Sports	36.04%
Boating and Water Sports	33.77%
Fine or local culinary dining	28.24%
Sleep late/take a nap	24.34%
Antique shopping	21.36%
Historic site/museum	20.87%
Hiking	20.38%
State or national park	19.19%
Festival/event	19.08%
Wineries/Brew Pubs	19.02%
Farmers markets/U-picks	15.23%
Fishing	13.17%
Camping	12.95%
Visited other friends & relatives	11.38%
Concert/live performance	10.79%
Other (please specify)	10.08%
Biking/cycling	6.88%
Art venues, galleries, studios	6.78%
Golf	6.72%
Family reunion	5.69%
Bird watching	4.66%
Motorcycle riding	3.74%
Sports event	3.09%
Did nothing	2.98%
Spa treatment	1.73%
Skiing	1.63%
Meeting/conference/training	1.25%
Wedding	1.19%
Hunting	0.60%
<b>Total Respondents: 1,845</b>	

Following is a list of major attractions/events in Warren County/The Lake George Area. Please check ALL that you visited while in Warren County/The Lake George Area.

Answer Choices	Responses	
The Factory Outlets of Lake George	54.22%	809
Lake George Steamboat Cruises	50.60%	755
Fort William Henry Museum	32.51%	485
Great Escape and Splashwater Kingdom Theme Park	29.09%	434
Adirondack Winery	18.43%	275
Around the World Mini Golf	17.76%	265
Natural Stone Bridge & Caves	10.92%	163
Gore Mountain	10.46%	156
Lumberjack Pass Miniature Golf	9.99%	149
Lake George Winter Carnival	9.25%	138
Glen Drive-In Theater	8.51%	127
Adirondack Balloon Festival	7.71%	115
Lake George Carriage Rides	7.71%	115
Painted Pony Rodeo	7.51%	112
Adirondack Adventures	6.90%	103
Americade Motorcycle Touring Rally	6.70%	100
Adirondack Nationals Car Show	6.23%	93
Adirondack Craft Beverage Trail	5.63%	84
Jazz at the Lake - Lake George Jazz Weekend	4.89%	73
Hudson River Nature Trail	4.69%	70
Adirondack Wine & Food Festival	4.09%	61
Maple Farm	4.02%	60
Adirondack Extreme Adventure Course	3.62%	54
Glen Falls Art	3.62%	54
Warrensburgh Museum of Local History	3.15%	47
Hyde Collection	2.88%	43
Hague Historical Museum	2.82%	42

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your experience visiting Warren County/The Lake George Area?

	1 (poor)	2	3 (average)	4	5 (excellent)	Total	Weighted Average
Overall experience	0.33% 6	0.55% 10	8.89% 162	32.91% 600	57.32% 1,045	1,823	4.46



Following is a list of amenities offered in Warren County/The Lake George Area. Considering this visit, please rate each amenity on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent). If you did not participate in any of the activities please check "N/A". Check one rating for each.

	1 (poor) (1)	2 (2)	3 (average) (3)	4 (4)	5 (excellent) (5)	N/A (6)	Total	Weighted Average
Overall appeal of the attractions in Warren County/The Lake George Area	0.33% 6	0.77% 14	11.09% 201	31.83% 577	52.90% 959	3.09% 56	1,813	4.45
Quality of customer service	0.55% 10	1.49% 27	16.05% 291	34.47% 625	43.46% 788	3.97% 72	1,813	4.31
Ease of finding visitor information	0.28% 5	2.11% 38	16.88% 304	30.09% 542	40.59% 731	10.05% 181	1,801	4.39
Variety of shopping & merchandise	0.55% 10	2.05% 37	20.19% 364	31.06% 560	39.71% 716	6.43% 116	1,803	4.27
Range of choices for dining out	0.88% 16	3.64% 66	20.30% 368	32.05% 581	38.61% 700	4.52% 82	1,813	4.17
Signage and wayfinding	0.45% 8	1.23% 22	18.60% 333	35.42% 634	36.82% 659	7.49% 134	1,790	4.29
Lodging value you received for the price paid	1.27% 23	3.38% 61	19.73% 356	23.95% 432	32.43% 585	19.24% 347	1,804	4.41
Evening activities	0.56% 10	3.41% 61	20.31% 363	28.04% 501	25.52% 456	22.16% 396	1,787	4.41
Variety of children's activities	0.51% 9	1.58% 28	10.62% 188	16.38% 290	21.64% 383	49.27% 872	1,770	5.05
Parking	8.23% 148	15.46% 278	35.76% 643	22.19% 399	15.18% 273	3.17% 57	1,798	3.30
Traffic	4.84% 87	11.46% 206	40.88% 735	25.97% 467	15.02% 270	1.84% 33	1,798	3.40

**How can we improve or add to your visitor experience in Warren County/The Lake George Area? (please use short statements if possible)**

More new and unique restaurant and dining experiences	Cheaper food
Updated hotels	Crossing guards
Better quality wineries and breweries	You can't we love it !
miss the free parking on w brook road near mini golf	You can't
Free parking would be nice	more parking
tourist attraction to expensive policeman to control traffic	more family restaurants
Traffic by outlets	customer service is poor in stores and restaurants
Parking	parking too expensive, not ample parking
More Clear Trolley Schedule	trash cans on the streets are overflowing
motels with pet stays	More advertisement
weekend planned itinerary	offer more specials for accommodations and events
Eliminate paid parking	upgrade some of the back roads-too narrow
cheaper parking	Love the area everything is beautiful
do road construction during late fall	enjoyed the ride for 4 years
more affordable parking	More free parking
more parking - I got a ticket	Make more parking available
More public parking	You can't. It's perfect
Public parking very expensive (\$2.00 per hour?)	just wish more places to go and park that are inexpensive where RV can fit
Public parking meters not accepting bills and do not accept credit cards	open earlier
fine as is	casino
More rest rooms in town	everything was much more expensive compared to surrounding areas
better parking	Parking a must
more parking available in the village	Maybe another theater
Parking needs to be addressed	Every thing else is great
Nothing I can think of at this time, except improve traffic conditions.	More quality casual eating in outer areas
more parking lots in town.	More outdoor activity for variety of fitness levels
traffic	Lodging needs updating.
More parking, like a parking garage	less parking meters on side streets

Have a public parking lot at lower cost  
 more parking  
 better traffic control  
 Get some good restaurants  
 More dog friendly places. There's like 2 in  
 LG Village and places I can sit outside and  
 eat with dog since they're not allowed to  
 be left unattended  
 Dogs on islands! I want to camp on an  
 island with my dog  
 Improve dining options in LG village  
 Add more unique shopping instead of just  
 tshirt shops  
 More evening activities  
 More dog friendly businesses  
 Dog park  
 Special parking fees for property owners  
 Less expensive and more available parking  
 Hotels better CDN Deals as Watertown Re:  
 Dollar  
 More local event fliers  
 FREE PARKING NO METERS  
 More family activities  
 Better parking  
 More variety of cuisine  
 It's perfect.  
 More truck accommodation  
 public transportation  
 increase parking areas  
 reduce traffic volume/walk only areas  
 Better parking (free!)  
 increase police visibility in Lake George  
 village  
 more parking in Lake George  
 get rid of traffic circles in Glens Falls  
 Events in given areas well ahead of time  
 Groupon or discounts

Sightseeing maps  
 another supermarket that is within walking  
 distance of town  
 MORE HANDICAP PARKING  
 CHEAPER PLACE FOR SENIOR  
 more parking availability!  
 more parking  
 Better timing of traffic lights in the village.  
 Have more Police involved in traffic control  
 in LG village at night.  
 add parking  
 More children entertainment  
 I cannot think of anything at the moment.  
 less chain stores  
 Have police dept. not pick on bikers.  
 Beach umbrella/chair rentals  
 Don't close everything in September  
 Better parking and traffic control  
 sell season passes for parking in the  
 village  
 discounted parking would encourage  
 shopping in village  
 don't go when it's Americade again  
 won't go to motel 6 again  
 area around lake looked unkempt  
 Children's meals other than craft  
 mac&cheese  
 Family friendly restaurants  
 Retire horse drawn carriages  
 affordable lodging prices  
 more choices of dining  
 Easier parking for Thursday night fireworks  
 Ticket free Thursday night parking ( I did not  
 get ticketed)  
 local gym/ health and fitness  
 better restaurants

things to do at night  
Nothing  
more good restaurants downtown  
better parking  
lower priced hotel rooms  
more information about Lake Placid  
More parking  
More modern accommodations  
Public parking  
Rental prices are too high  
do not allow motels that do not meet minimal standards to advertise in the official warren county Lake George brochure  
More police - some rowdy people up there  
More parking - we didn't go to several places because we couldn't find parking  
More dog friendly activities  
Better shopping in the village  
Quality food choices.  
More higher end restaurants  
Spas  
Stop having parking tickets when you are 3 mins late!!!  
all OK  
parking  
get rid of the riff raff - make a mess of the town w/garbage  
less construction  
Update shops in Lake George  
More activities on lake George  
More scheduled events, fairs, farmers markets, flea markets etc.  
Make lake George village more quaint  
Lower your prices  
Improve traffic & parking  
Better variety of dining  
More family events  
Outdoor concerts  
Better dining venues  
More night time live entertainment  
zip lines  
4 wheeling  
go carts  
more bicycle facilities  
more coffee vendors  
more parking (We realize that could also adversely affect the nature of the area)  
More parking spots in Lake George Village  
more and easier parking  
Better restaurants.  
businesses need better efficiency  
better weekday hours  
Better restaurants  
more cultural events  
better fishing and cleaner environment needed  
Upgrade lg village shops. Use lake placid as a model  
Village shops offered better merchandise in the past  
More parking  
the outlets need to change over stock  
can't do anything about Canadian dollar  
make parking available and free  
schedule street performers  
food/restaurant coupons  
improve accommodation  
hotel rates expensive  
tow truck rate we got totally ripped off!!  
very upset!!!  
Motel rates in Lake George village and Route 9N are unreasonably high.

Continue more of the same  
have festivals  
outdoor concerts  
The eatery called Crabby Dicks was awful and should be shut down.  
Improve Gore MTN management  
Unfriendly. Backward. Incompetent.  
Lower Lake George costs. Too expensive to boat.  
Recommend going somewhere else.  
We were off season and a lot of places were close, too bad.  
Cheaper  
More kids activities  
More festivals  
More bike trails  
More food choices for on the go - Hard to find a Wendys, etc.  
We love Lake George just the way it is  
stores open later  
more parking  
Better local events listings.  
traffic along route 9 into and out of LG village needs improving  
Be more pet friendly.  
Get rid of the carnival atmosphere  
Bring back the small town feeling  
Lessen the traffic  
Improve town workers and roads  
Complete road construction.  
More visible road signage.  
Mow grass near road edges--difficult to see traffic.  
offer more indoor activities for rainy days  
provide phone app for trolley location and arrival times  
Remove handicapped parking fees in Lake George  
That rotary in Glens Falls is dangerous  
Lower prices  
Make it a year round destination  
Better events more events better concerts  
Do something about the traffic  
none  
Make it easier to find a house to rent  
haunted tour would be fun  
Affordable hotel  
Overall experience  
Lodging, camping prices posted, available  
Toll free phone numbers - Restaurants,  
Up coming events  
Provide more parking in Lake George Village  
Restaurants could be better  
FREE PARKING for the Village main street!  
Give FIRM DATES of Thursday night fireworks!!!  
Pet friendly stores we can't shop and spend money when we have our dogs.  
Get on the store owners about cleanliness and over all curb appeal.  
Announce local big events via social media and advertisement. Ex. Car show, firefighter convention, Americade, Elvis fest.....  
Really love the car parades... Encourage similar activities  
List more public fishing areas (can you fish down the strip- etc)  
Encourage year round activities and restaurants. Since places close in the winter, it limits culinary choices.

Having fair cost of lodging in the area  
 There isn't anything at the moment  
 Less Traffic  
 less chain stores more small town feeling  
 Get rid of those tickets to park  
 More year round stuff in LG  
 Overhaul LG Village so it isn't so tacky  
 Uber!  
 More affordable  
 More free parking  
 Free activities  
 We enjoyed our trip and there was a lot to do.  
 We loved the water as my kids and I are fish.  
 Please continue to keep Lake George clean  
 consider limiting noisy personal water craft on LG  
 Provide direct NYC to Lake George buses  
 Provide shuttle bus from NYC bus depot to various hotels/motels  
 More cultural diversity is needed.  
 Everything was great!!  
 Local police to direct traffic at outlets.  
 Improve timing of stoplights at outlets.  
 Need excellent coffee shop Lake George  
 Bring back Gas Light Village  
 More summer festivals.  
 More family orientated lounges with entertainment  
 Rentals are very high  
 3% sales tax  
 Ban cars from village for certain events  
 Move entrance to highway away from main road through malls at Queensbury

Parking  
 Fireworks traffic (July 4) None  
 Open additional hunter access  
 Promote hunting recreation  
 Manage fish populations better/minimize invasive species  
 More toddler specific attractions  
 More coupons.  
 Improve navigating in and out of the outlet parking lots.  
 Add more fireworks shows.  
 parking  
 traffic  
 fishing permits  
 Add some finger lakes wineries  
 More campgrounds  
 more parking  
 More free parking  
 More traffic control  
 Offer coupon deals  
 traffic area is too congested at the outlets  
 Have more buses to bring you around.  
 Get rid of special permit to put a boat in the lake.  
 Parking rates are very high  
 Overpriced hotel  
 Niagara Falls atmosphere  
 traffic flow  
 Lower rates. Hotel/motel charged exorbitant rates.  
 More activities for kids.  
 Not conducive for older and/or disabled to get around because parking is inconvenient  
 More public parking in the village of Lake George

Reduce prices Make hotels more accessible  
Get rid of affordable storage Paul wells, he's a criminal in fort Ann close to campgrounds and it's scary for visitors  
More Dog-Friendly Options/Attractions  
More parking  
Traffic flow through route 9 by the outlets  
More parking  
More classy pubs with food  
Decorate Main Street with flowers/clean it up  
better parking  
More Indian/Pakistani dine out places  
more public parking  
Make Uber available  
Improve Verizon service in area  
Better Parking  
Better parking facilities in Village  
free parking  
more hands on participatory and learning events  
Parking in town  
More wineries  
More live theatre  
Less chain restaurants. More high quality restaurants.  
have more free parking  
remove meters on the side streets  
Better parking  
More quick and easy park listings  
more concerts during week  
Shops/restaurants stay open later  
Eliminate Occupancy tax  
Better choice of foods. Everyone serves bar food and no real sit down meals...

better parking  
Offer special deals for dining and hotel stays.  
More parking  
Keep it family friendly.  
Keep big corporations out.  
Feature history of Native Indians and Early Settlers.  
Not sure  
More accessible Park and Ride.  
Better value  
More space for motor cycles  
Love it just the way it is  
cheaper camping rates  
more/easier parking  
cheaper food  
Free parking  
Mexican restaurant in center of LG refused to let me in w/ my service dog!!  
A more updated/comprehensive list of smaller and/or cheaper hotels and motels  
Better traffic flow on rt 9 between Glens Falls and Lake George  
Everything was great except the Econo Lodge on Aviation Road  
more parking  
more cabins  
more space between facilities  
nothing specific  
More parking  
Bad traffic at outlets  
no improvements needed  
tourist attraction to expensive traffic and parking  
more specials at hotels etc.

We were there the day after Labor Day and weren't aware that MOST of the stores & restaurants were closed!

Have more going on during the week

Trolley running time info

Weekday boat rides at night

more breweries

evening activities for skiers at Gore

More restaurants.

lower prices

Better food main strip

All in all had a nice time.

Give rewards to returning customers at hotels

more concerts

Better parking

Larger grocery

Love the charm of Lake George & may it continue to keep yesteryear alive. Too much modernization to the area would make it too much more of a tourist trap.

parking should be free

Ice Cream shops should be open July 4th weekend (North Creek)

Gore Mountain gondola same

Waiting 12 minutes for a coffee with 1 person ahead of me - ridiculous. (North Creek)

Nothing

Good parking

You can't. It's perfect

Tourist building

Radio station for tourists

More parking to come into town

More parking areas

more parking in Bolton Landing

lower prices of hotels

coupons for dining out with a family of 4

Better parking in Lake George village

Some stores not selling all Adirondack stuff like everywhere else

Better transportation for those unwilling or unable to drive.

Finding parking can be an issue

Public restrooms by beach disgusting

Carriage rides need to be abolished (PETA is investigating many of these tours)

More Parking

Parking can be difficult \$2/ HR to park is expensive

Have more parking kiosks

Improve traffic situation

More available parking

More reasonably priced lake side cabins

More off season activities

market family activities near/around lake none

Bathrooms

Cheaper parking options

More family friendly festivals

lodging a little too costly due to CAD dollars

more food choices

friendlier business owners

Boat ramp parking was full early but the overflow was not opened .why not?

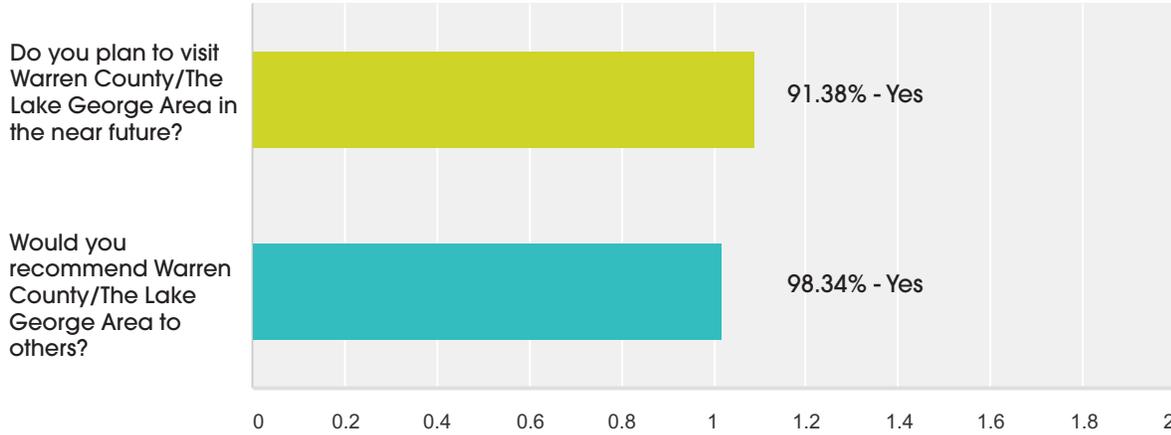
Have a pass card like cities do (Philly pass for example)

Book Beatles cover band more often  
Discounts on parking  
More Family & Adult Activities  
Parking in lake George is scarce  
Get rid of new hotel in LG village  
Did not know all stores shut down in Fall, Lake George  
Call Center for actual Foliage Change, if ahead or behind schedule  
nothing  
fix traffic congestion  
make parking areas larger ad free  
lower parking rates  
limit bigger motels on Canada St.  
Require boaters to be licensed and certified before being allowed to drive a boat on Lake George!  
Better parking.  
Improve the LG Outlet stretch of road. Very crowded, bad flow.  
More landscaping, and greenscaping.  
Improve the facade of some of the older stores in the village.  
Better Trolley service  
Restaurants suck  
overall very nice  
More children's activities  
all good  
Improve winter carnival  
More parking areas in town on rat 9. Canada street. Lake George  
You are great  
Lower prices  
Hotel availability  
free parking options  
better parking  
better parking  
more wheelchair accessible  
children's activities  
lower prices of most things  
keep Lake George scrupulously clean...it is a national treasure  
Nothing better food  
More free attractions  
More parking  
lower prices  
police around every corner  
everyone's hand is out  
make it more pet friendly (I have an emotional support dog that I travel with  
Better Hotel Lodging Values  
Diversify cuisine  
Children centered events  
Obstacle course competitions, family, friendly, and competitive  
more dining  
Parking  
Traffic  
Better Parking  
Night time activities that are not drinking related  
better parking in Lake George  
better communication of what all is offered  
Add more different kind of factory outlet  
more parking  
have more vegan items on menu  
food festivals of local places  
Parking in village is terrible  
Traffic around outlets is terrible  
Senior Discounts  
Dining - buy one, get one free  
More public restrooms that are clean and

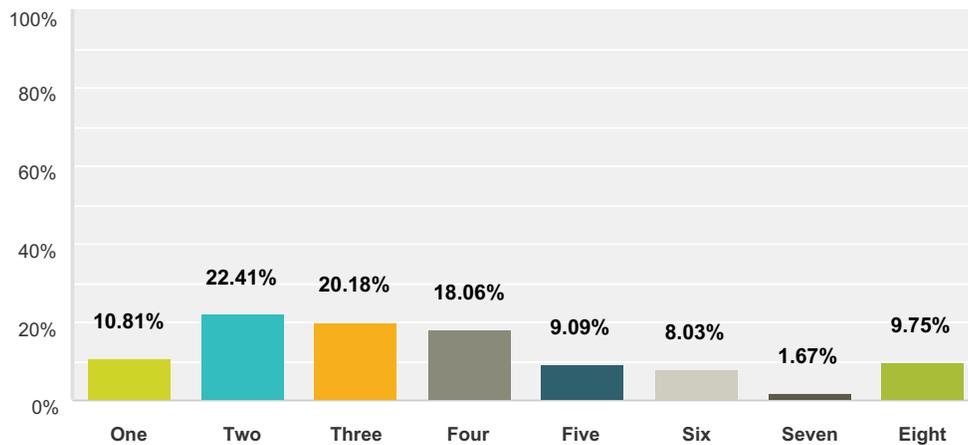
well maintained	bikers during a motorcycle event.
More restaurants rather than the usual bar/ burger joints	Public Service type info. on how to donate to preserve more land for park land/open spaces please. Thank you.
Better choices for hotels/motels that offer competitive pricing	Better parking
Keep up the good work!	N/A
Some hotels are shoddy for price	more kid(younger) friendly attractions
Parking too difficult	less commercialism
Food, lots of choices, quality so-so	Shuttle Service
Improve parking	More Secure Parking
Provide more motorcycle parking	More free things like the fire works
Get rid of parking meters	More kid friendly things
Improve camping reservation system for islands	Cheaper places 2 eat,
Better customer service for locals	cleaning up the village between the restaurants and lakefront
more French language	making village family friendly again,,some inappropriate storefronts
lodging is pricey	more parking
more parking for RV visitors	Don't repair roads in the summertime
Lower prices for shows	Better sidewalks
Lower hotel prices	Build roads with Bike paths
Allow over night not 3 days	motel prices too high for August
more farmer's markets	considering Canadian exchange
better dining choices	no complaints! planning a longer visit later this summer!
better signage and directions	parking should be free to visit and spend \$\$\$
lower hotel / motel prices	more night life activities
Better Traffic Flow	maybe a big block party where they close down the street traffic
Provide more Parking Areas	Lower prices
Hate that room rate double for Americade	More handicap parking
Haunted /Paranormal tours of buildings in Warren County.	More parking
don't have to.	Do road maintenance in off season
Have a campground for adults only,no kids	Really nothing else - this is our "heaven on earth"
Have a truck go around the campground w/beer and ice.	
keep damn cops away looking to ticket	

Public Restrooms open all year round for off season visits.	More Public Parking in Lake George Village
More food options, lots of pizza, especially lake George.	More parking
easier use of parking meters. Ours was broke	More cultural events
better fishing	Discounts to local attractions
More Parking facilities	Continue family friendly entertainment
Better road signs	Parking
Expensive hotels	Public Restrooms
nothing really	Fireworks
enjoyed our time was relaxing as we wanted	More parking in village near the steam boats
Improve traffic flow around outlets	pair with Canadian dollar
Provide more and free parking	Easy walk from RV park to stores
History tour of the Sagamore	Commute to 6 flags park
Uber	No pets
Allow walking around with alcohol	More info on attractions. Publish more printed materials
nothing	time to update village
more public parking	More restaurants
more outlet stores at the new buildings	Access to lake.
fishing opportunities	Discounts during the week
hiking	promotions and giveaways
restaurants	more free children's activities, face painting, balloons, etc
More Parking	Widen road near outlet malls
Buffet style meals are better with kids in tow	Canadian \$ at par
More places next to Lake Luzerne open for Breakfast	More parking (free)
direct response from emails when requesting first time visits	Better traffic flow
Offer more to do with less of a price tag	Discount coupons & Senior rates
bring down the cost to stay	Traffic was high volume. Easier access needed to get into & out of outlets
More free municipal parking in Lake George Village	Lower your costs all over. The only reason we could even afford the hotel is because the Fire Department covers the bulk of the charge.
You're doing fine, I have been coming to the area for over fifty years	Encourage the village of LG to Post Signage
	Prohibiting Skateboarding on Village Streets

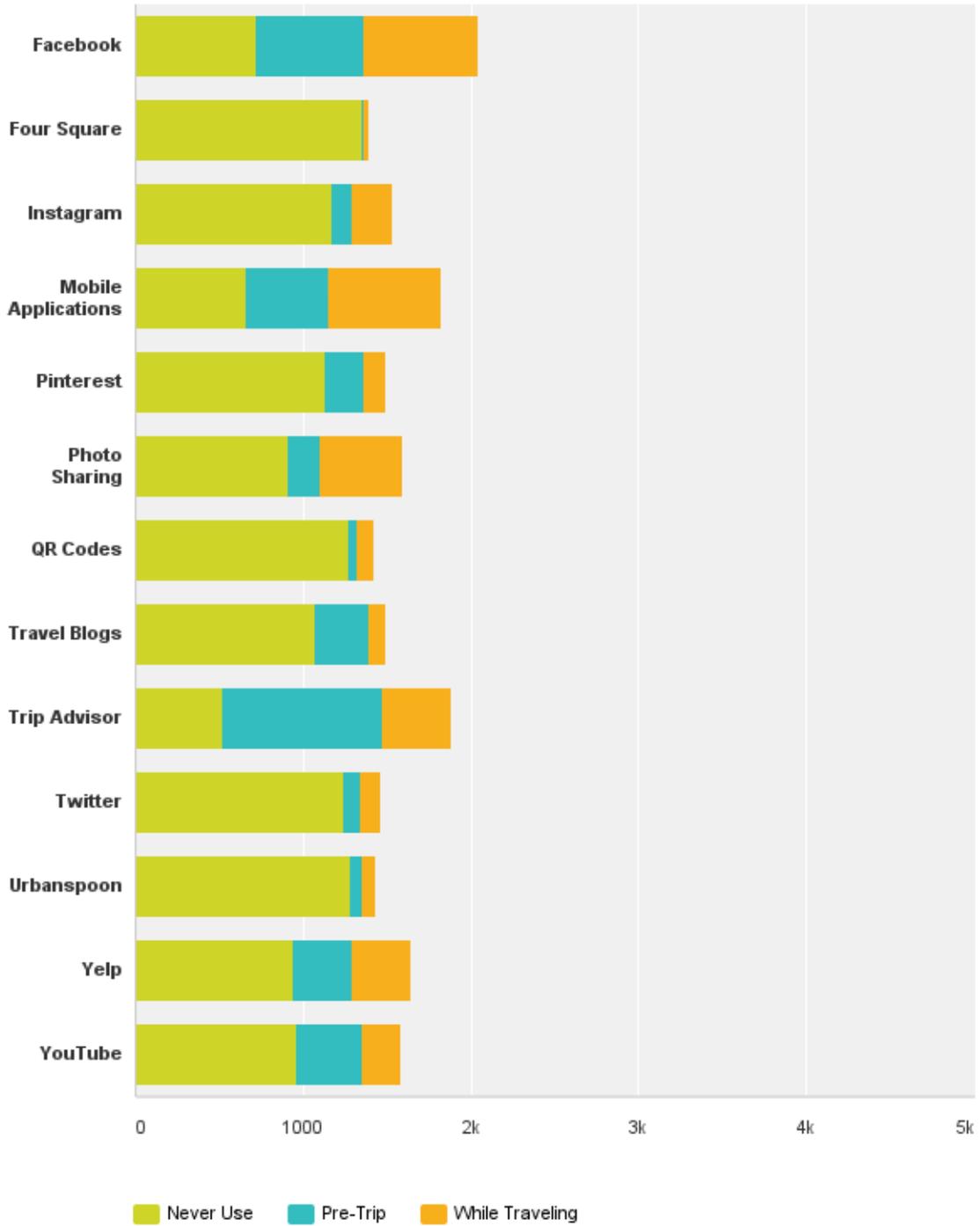
Based on your experiences during your visit to Warren County/The Lake George Area:



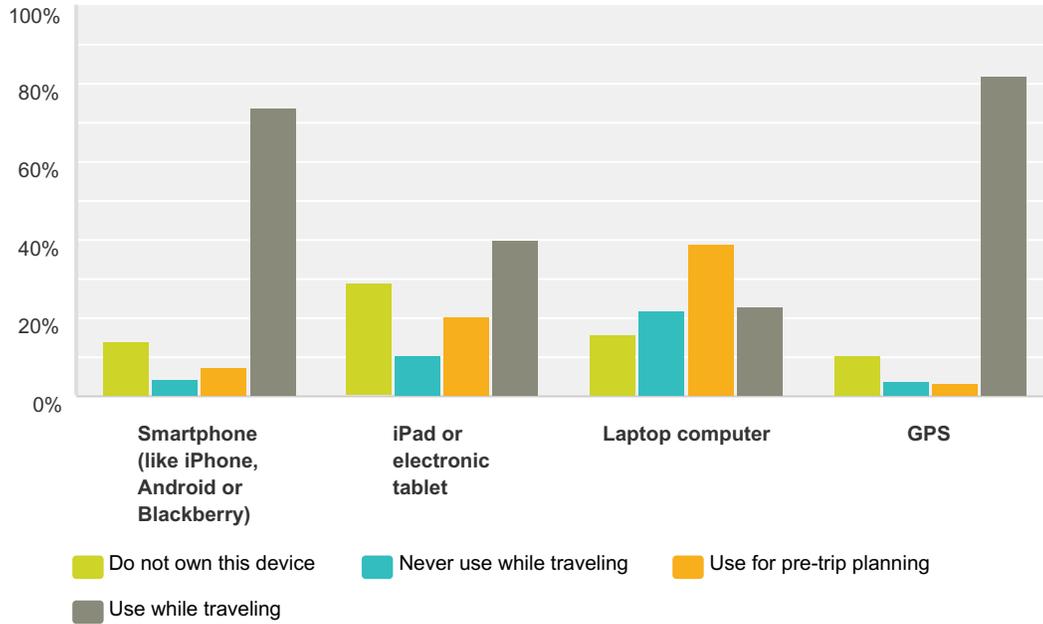
How many travel getaways (2 - 4 nights) do you take annually?



When do you use the following social media sites or applications as part of your travel? (Select all that apply)



How do you use the following mobile devices related to your travel(s)?



## RESPONDENTS WHO HOPE TO VISIT

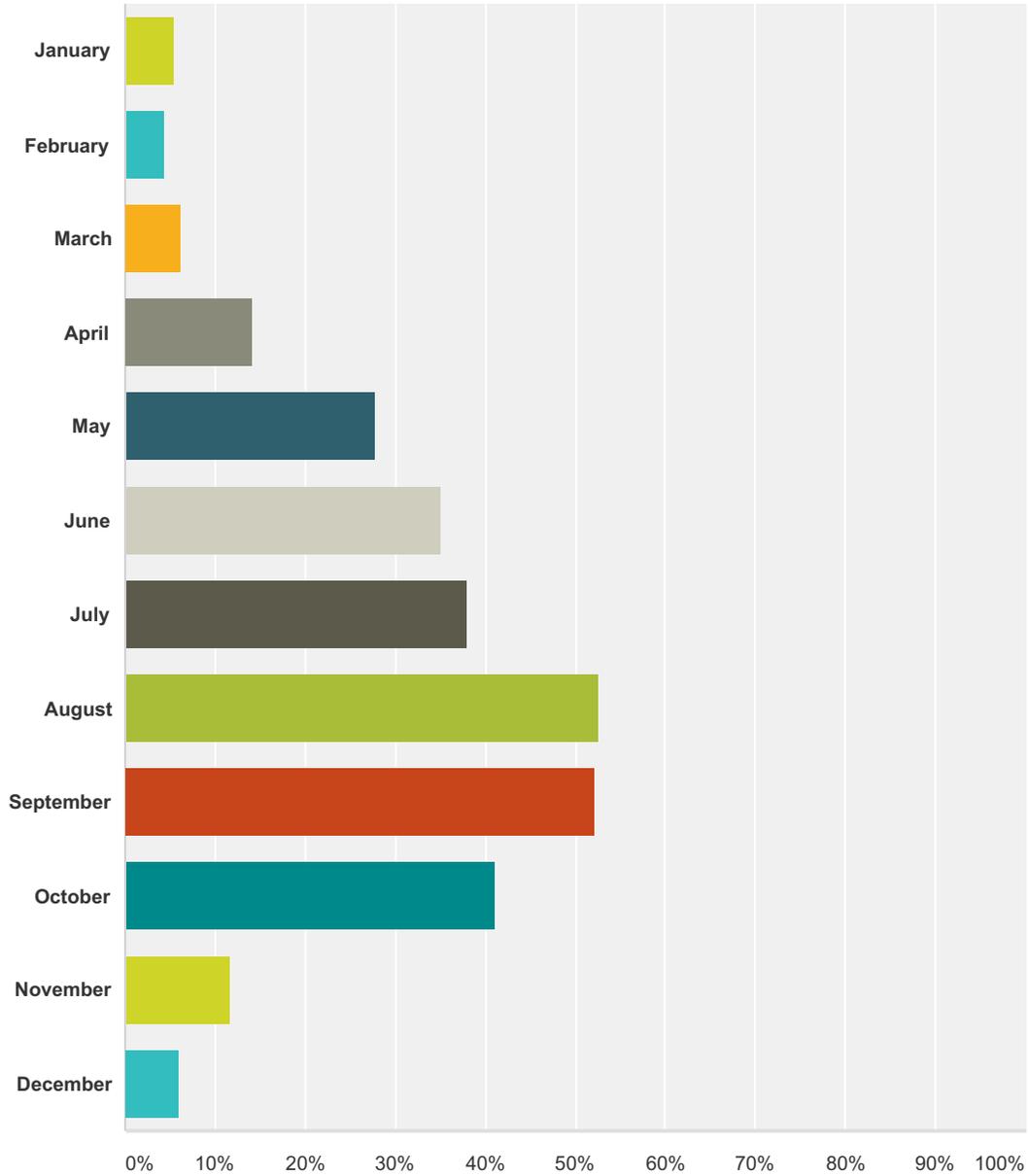
How did you first hear about the Warren County/The Lake George area?  
(Choose ALL that apply)

Answer Choices	Responses	
Friends/family referral	34.86%	114
Internet search	31.80%	104
Previous knowledge	26.91%	88
NY State Travel Guide	16.82%	55
Visit Adirondacks brochure	12.54%	41
None applicable	9.79%	32
Magazine advertisement	7.95%	26
TV advertisement	7.03%	23
AAA/Fodors/Zagat type guidebooks	6.42%	21
Warren County Travel Guide	3.67%	12
Warren County Brochure	3.06%	10
Print ad	2.75%	9
State welcome center	2.75%	9
Magazine/newspaper story	2.14%	7
Work/conference/event provided	2.14%	7
Adirondack Craft Beverage Trail	1.22%	4
Radio	0.61%	2
<b>Total Respondents: 327</b>		

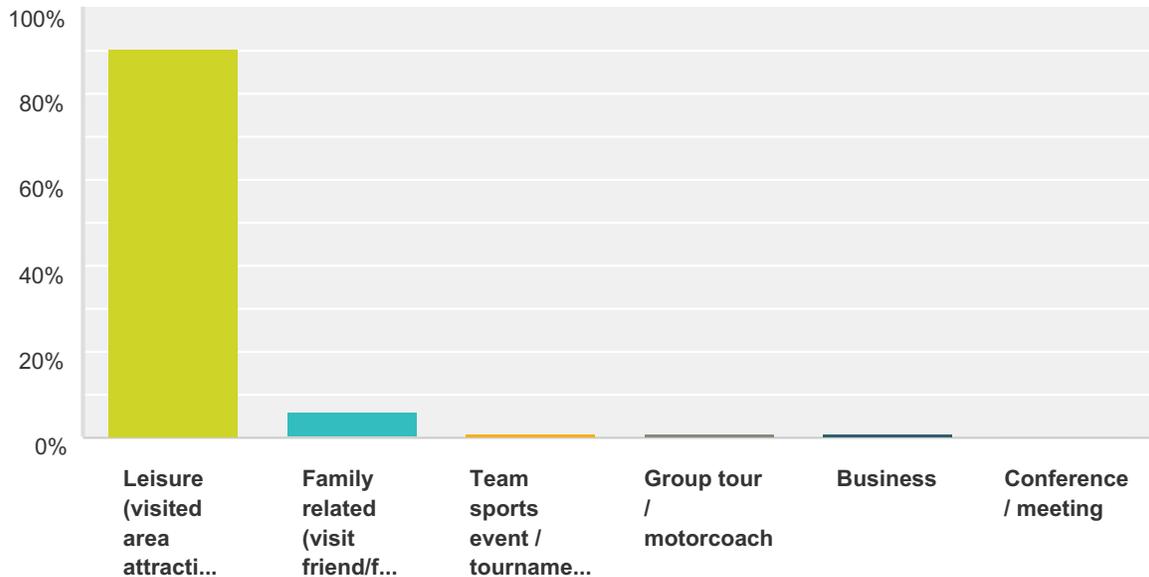
What information or trip planning sources will you use to plan your most recent trip to Warren County/The Lake George Area? (Choose ALL that apply)

Answer Choices	Responses	
www.VisitLakeGeorge.com	69.11%	226
www.visitadirondacks.com	32.72%	107
Travel Sites (Trip Advisor, Travelocity, Orbitz, etc.)	31.80%	104
Warren County Travel Guide	26.30%	86
www.ILoveNY.com	25.99%	85
Visit Adirondacks Travel Guide	22.94%	75
NY State Travel Guide	22.63%	74
AAA/Fodors/Zagat type guidebooks	17.13%	56
State welcome center	15.29%	50
Facebook	12.54%	41
Previous knowledge	11.62%	38
None applicable	6.42%	21
Adirondack Craft Beverage Trail Guide	3.98%	13
White Water Rafting Adventure Guide	3.67%	12
Adirondacks Fishing Guide	3.06%	10
Work/conference/event provided	1.22%	4
<b>Total Respondents: 327</b>		

Check all the months in which you will visit Warren County/The Lake George Area. (Check all that apply)



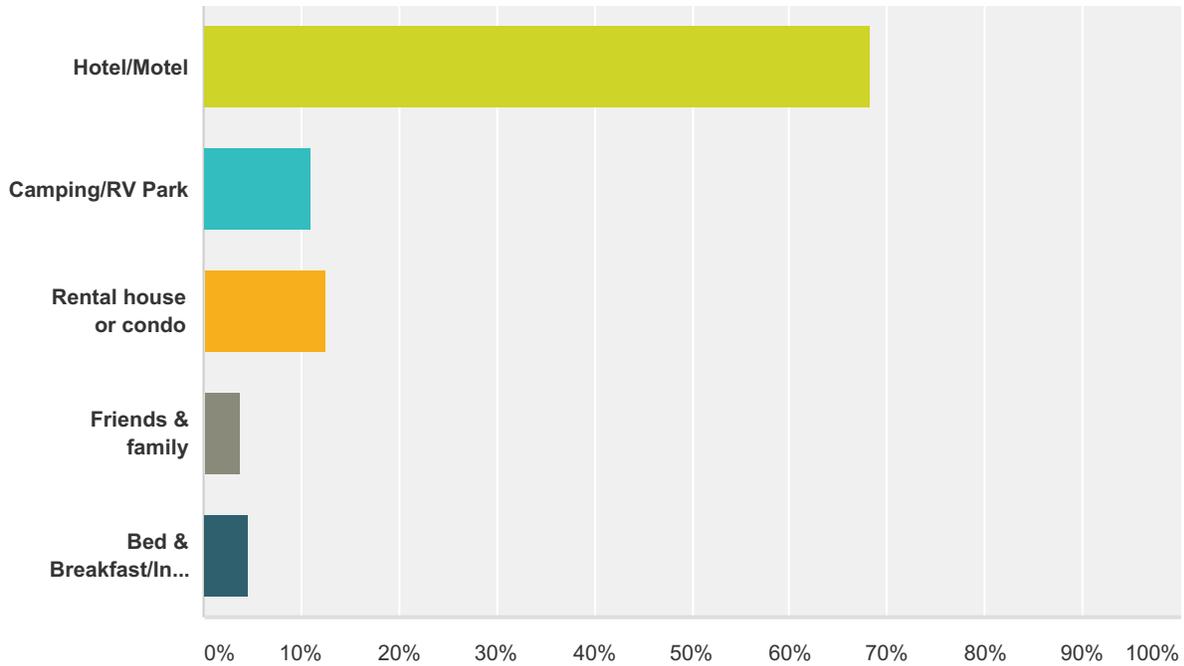
### What will be the MAIN purpose for your trip to Warren County/The Lake George Area?



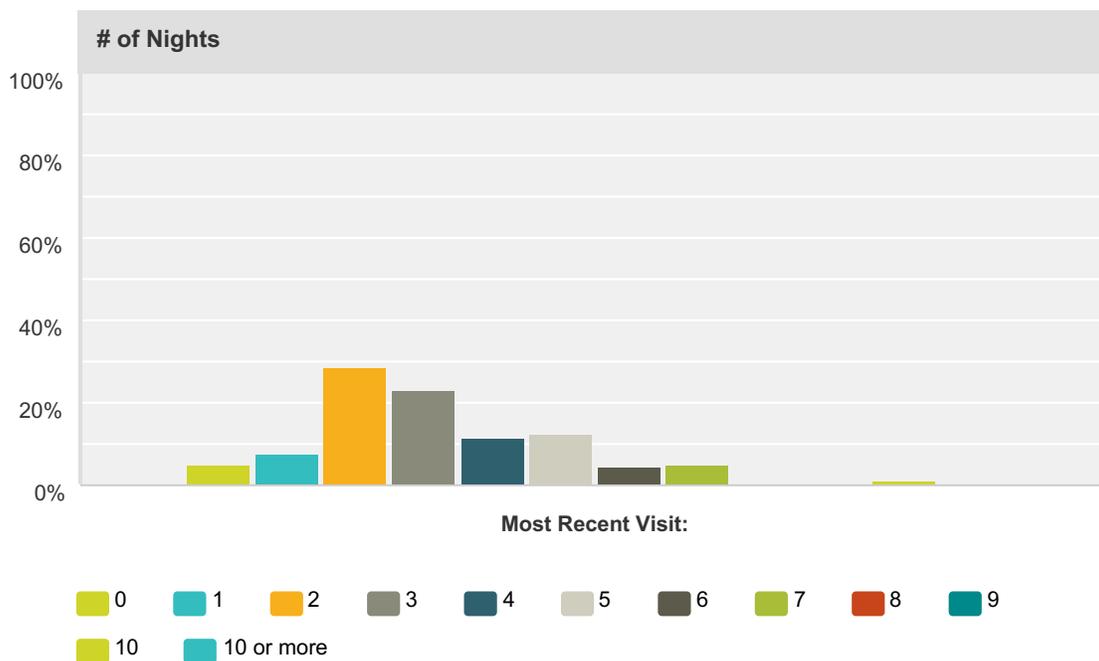
### Please categorize the PRIMARY purpose for your LEISURE trip to Warren County/The Lake George Area? (check ONLY one)

Answer Choices	Responses	Count
General relaxation	46.18%	151
Outdoor recreation (biking, hiking, fishing, boating, etc.)	17.13%	56
Historic sites / museums	11.62%	38
Other (please specify)	5.81%	19
Wineries/Brew Pubs	5.50%	18
Overnight as part of longer trip - passing thru	4.89%	16
Visiting friends and relatives	3.06%	10
Shopping	2.75%	9
Attend a festival / event / concert	1.53%	5
Arts venues, galleries, studios	1.53%	5
Reunion / wedding	0.00%	0
Attend theatre	0.00%	0
Attend a sporting event (recreation, college, etc.)	0.00%	0
<b>Total</b>		<b>327</b>

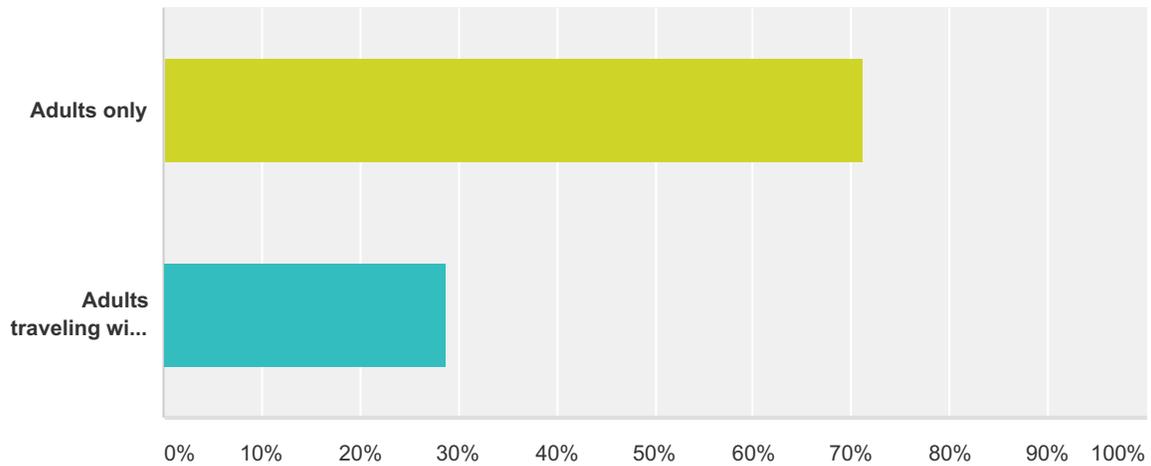
Where will you stay during your visit to Warren County/The Lake George Area?  
(Please select one)



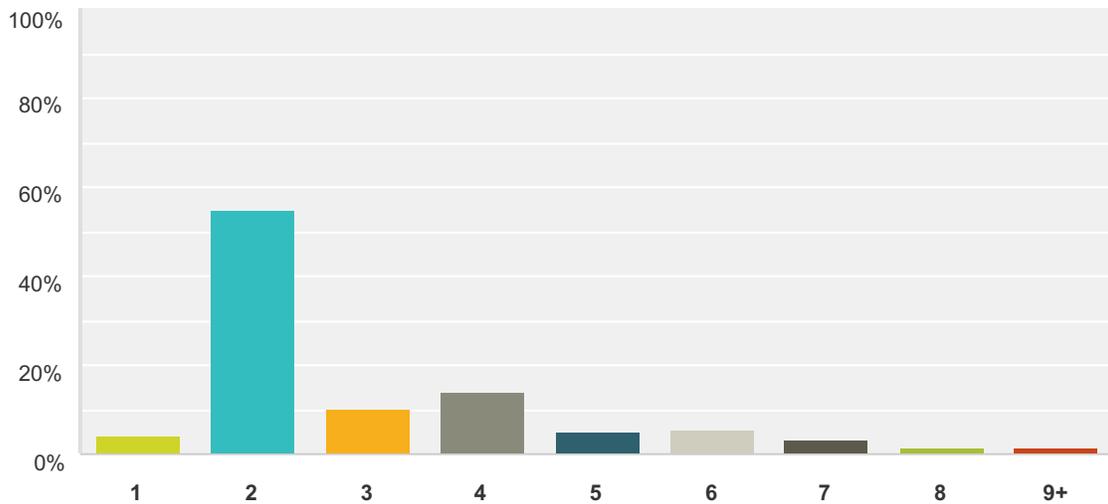
How many nights will you stay in Warren County/The Lake George Area on your visit?



What will your travel party be comprised of:



What will be the total number of people in your travel party?



What community will be the PRIMARY destination of your visit to Warren County/  
The Lake George Area? (Choose ONE)

Answer Choices	Responses	
Lake George	57.23%	182
Other (please specify)	16.04%	51
Adirondack	11.64%	37
Glens Falls	3.77%	12
Diamond Point	1.57%	5
Lake Luzerne	1.26%	4
Bakers Mills	0.94%	3
Bolton Landing	0.94%	3
North Creek	0.94%	3
North River	0.94%	3
Queensbury	0.94%	3
Warrensburg	0.94%	3
Pottersviller	0.63%	2
Silver Bay	0.63%	2
Athol	0.31%	1
Brant Lake	0.31%	1
Chestertown	0.31%	1
Hague	0.31%	1
Thurman	0.31%	1
Johnsburg	0.00%	0
Stony Creek	0.00%	0
<b>Total</b>		<b>318</b>

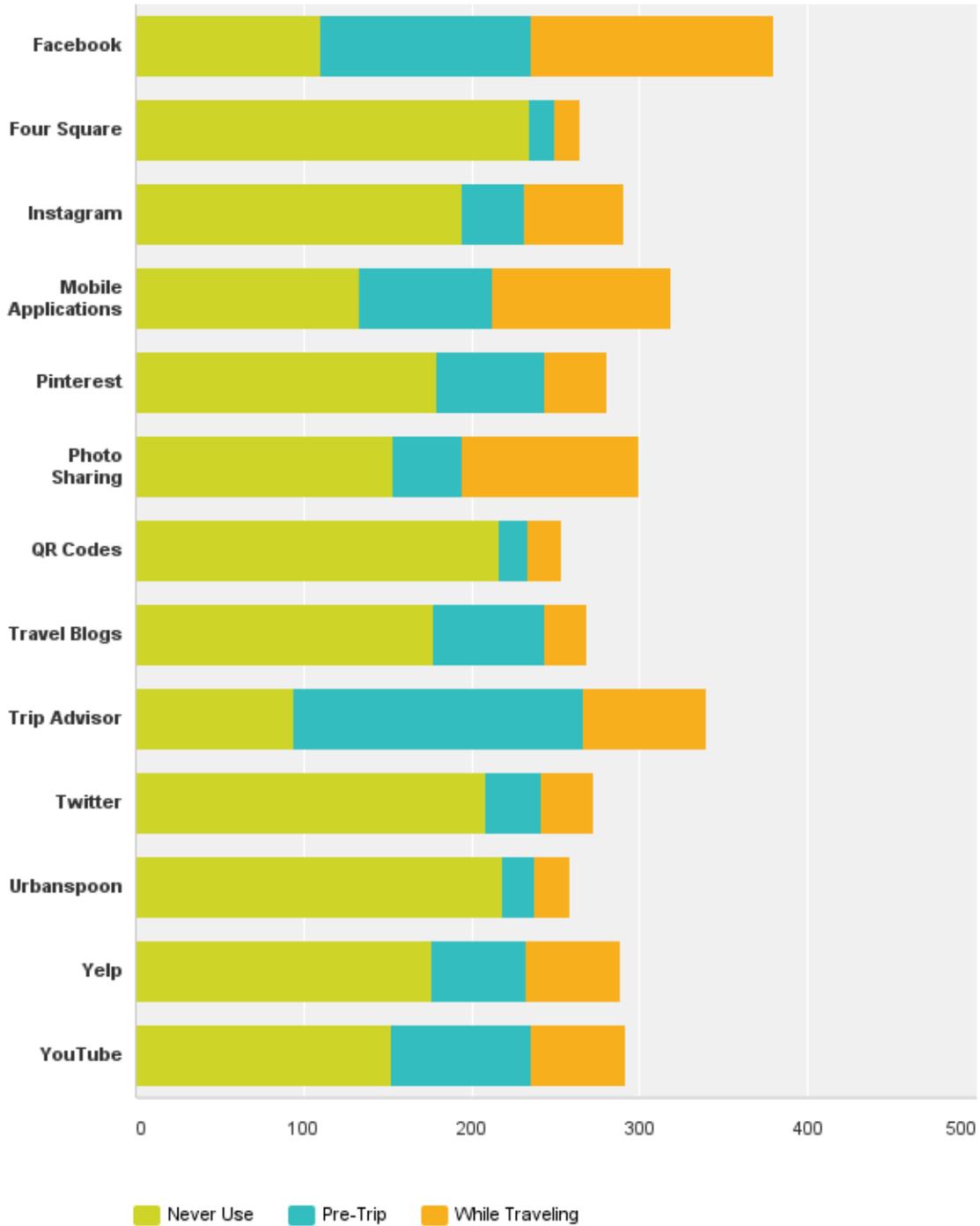
Check all activities you or a member of your travel party will do while visiting Warren County/The Lake George Area. (Check ALL that apply)

Answer Choices	Responses	
Antique shopping	36.73%	119
Art venues, galleries, studios	23.46%	76
Biking/cycling	18.21%	59
Bird watching	14.20%	46
Boating and Water Sports	26.54%	86
Camping	18.52%	60
Concert/live performance	16.67%	54
Driving/sightseeing	58.64%	190
Family reunion	2.47%	8
Farmers markets/U-picks	34.57%	112
Festival/event	34.26%	111
Fine or local culinary dining	39.51%	128
Fishing	16.67%	54
Golf	4.01%	13
Hiking	28.70%	93
Historic site/museum	45.37%	147
Hunting	2.78%	9
Meeting/conference/training	0.31%	1
Motorcycle riding	2.47%	8
Shopping	49.38%	160
Sleep late/take a nap	29.01%	94
Skiing	3.70%	12
Spa treatment	17.59%	57
State or national park	37.04%	120
Sports event	4.01%	13
Swimming & Water Sports	31.79%	103
Visited other friends & relatives	3.70%	12
Wineries/Brew Pubs	35.19%	114

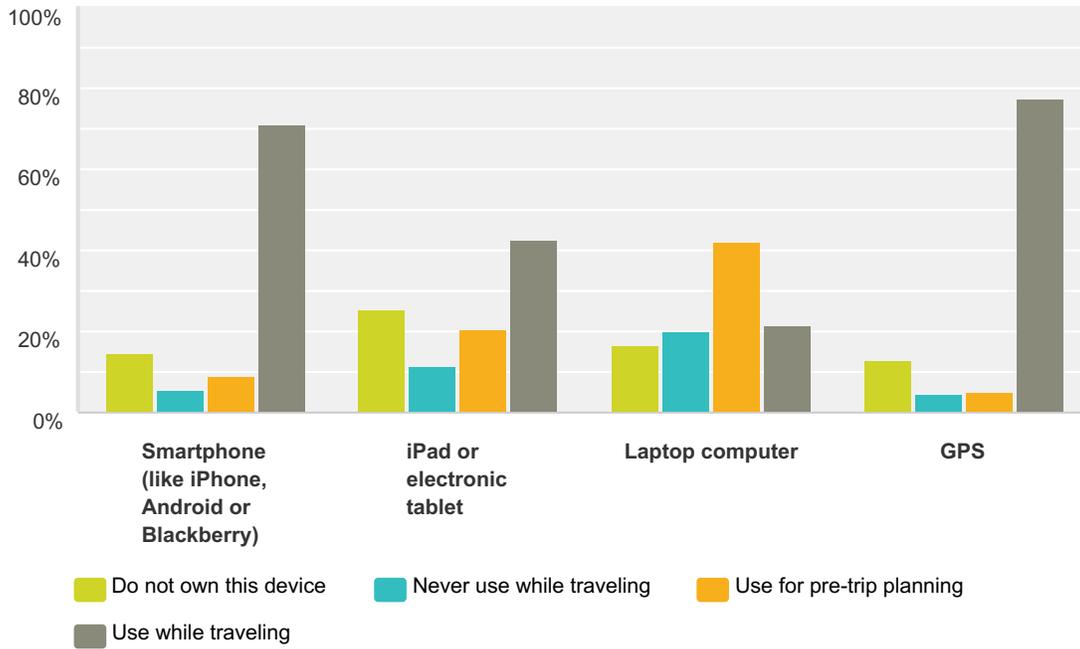
Following is a list of major attractions/events in Warren County/The Lake George Area. Please check ALL that you would like to visit while in Warren County/The Lake George Area.

Answer Choices	Responses	
Lake George Steamboat Cruises	51.97%	158
The Factory Outlets of Lake George	42.11%	128
Natural Stone Bridge & Caves	36.84%	112
Adirondack Wine & Food Festival	36.18%	110
Adirondack Winery	33.55%	102
Adirondack Balloon Festival	31.25%	95
Adirondack Adventures	30.92%	94
Lake George Carriage Rides	30.92%	94
Hudson River Nature Trail	29.93%	91
Fort William Henry Museum	28.62%	87
Maple Farm	27.30%	83
Great Escape and Splashwater Kingdom Theme Park	25.00%	76
Adirondack Craft Beverage Trail	24.67%	75
Hague Historical Museum	24.34%	74
Glen Drive-In Theater	24.01%	73
Upper Hudson Valley Wine Trail	22.37%	68
Warrensburgh Museum of Local History	19.41%	59
Gore Mountain	18.42%	56
Jazz at the Lake - Lake George Jazz Weekend	18.09%	55
Around the World Mini Golf	16.45%	50
Lake George Winter Carnival	16.12%	49
Adirondack Nationals Car Show	14.47%	44
Glen Falls Art	13.82%	42
Adirondack Extreme Adventure Course	10.86%	33
Lumberjack Pass Miniature Golf	10.86%	33
Hyde Collection	9.21%	28
Painted Pony Rodeo	9.21%	28

When do you use the following social media sites or applications as part of your travel? (Select all that apply)

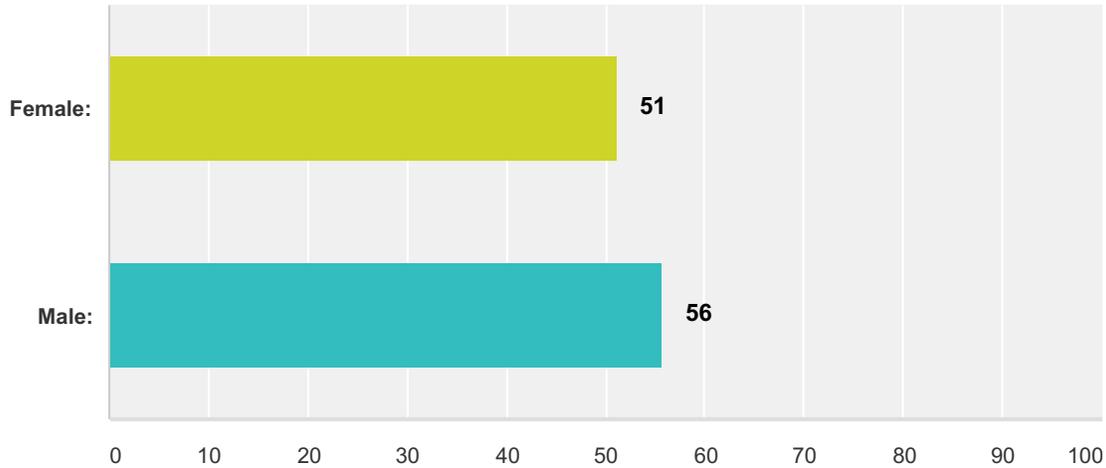


How do you use the following mobile devices related to your travel(s)?



## ALL RESPONDENTS

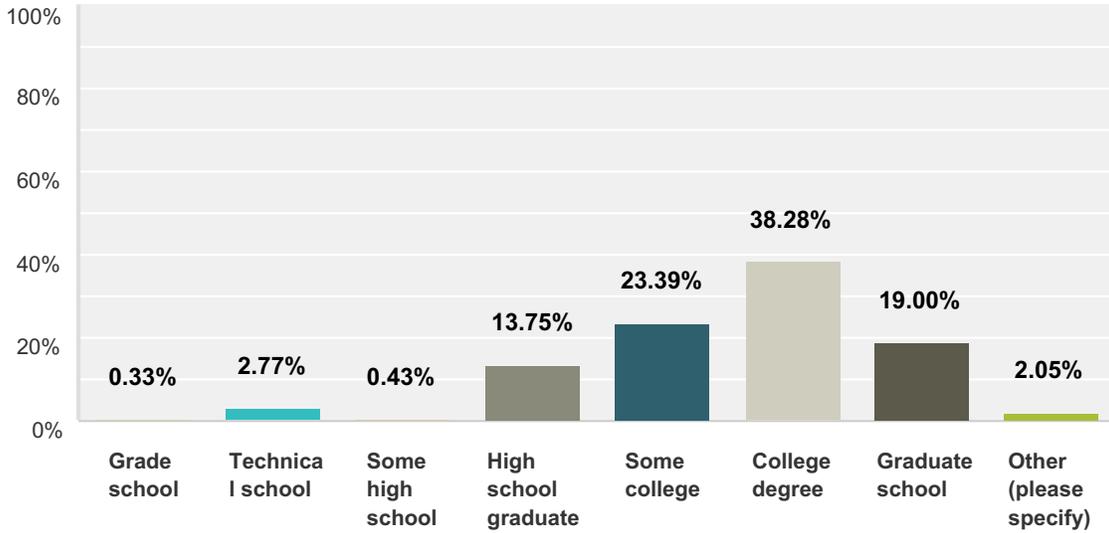
Please provide your age in the box next to your gender. Provide a response in one box only.



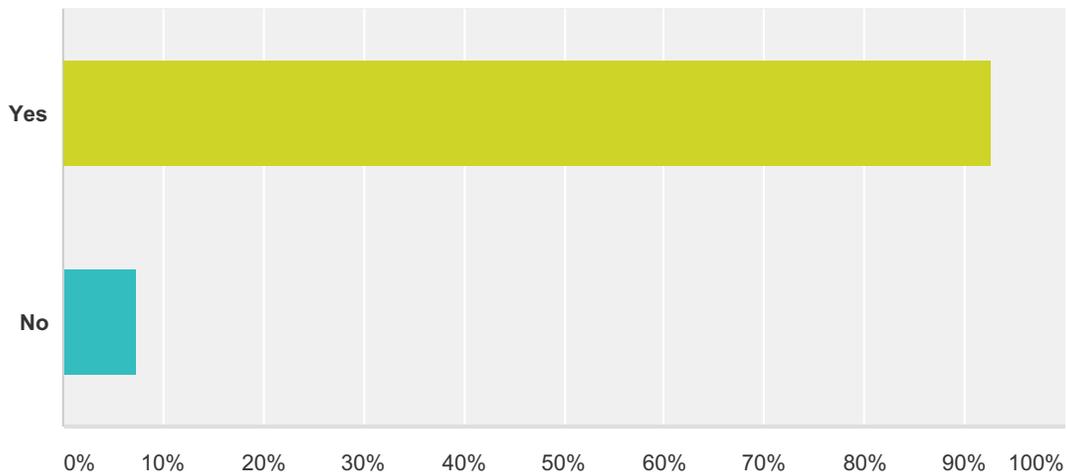
## What is your occupation?

Answer Choices	Responses	
Retired	22.54%	472
Other (please specify)	11.99%	251
Professional/technical	10.70%	224
Healthcare industry	9.65%	202
Secretary/clerk/office	7.98%	167
Teacher/professer/education	7.74%	162
Executive/manager	6.59%	138
Self-employed	5.59%	117
Government/military	4.54%	95
Homemaker/stay at home parent	3.63%	76
Craft/mechanical/factory	3.20%	67
Sales/buyer	2.34%	49
Unemployed	2.20%	46
Attorney	0.76%	16
Religious/clergy	0.43%	9
Student	0.14%	3
<b>Total</b>		<b>2,094</b>

What is your level of education? (Choose one)



Do you reside in the United States? This helps us know where visitors to Warren County/The Lake George Area originate.



**Please tell us where you reside?**

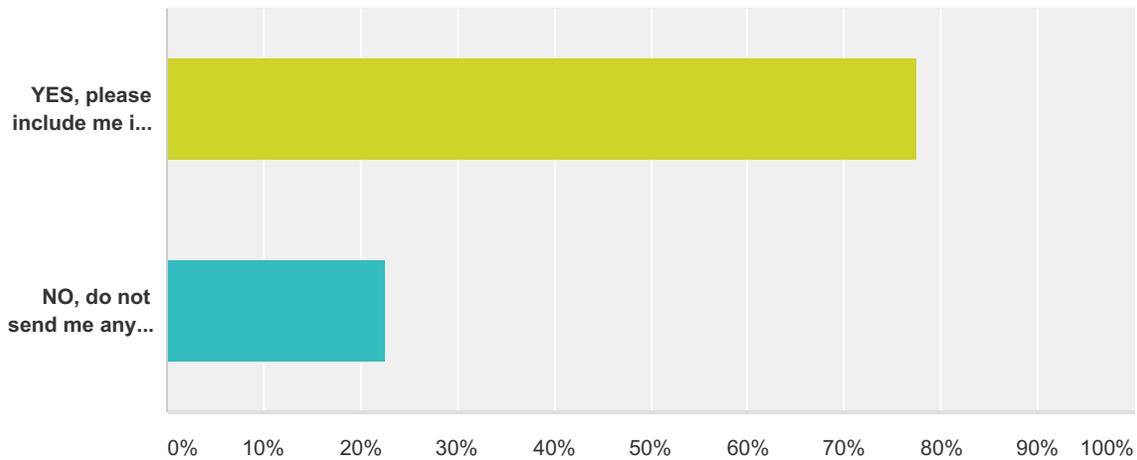
NY, NJ, CT, PA, MA, other states in the Northeast, and Canada were common responses from the 2,111 people who answered this question.

STATE	# of Respondents	Percentage of Total
New York	1106	52%
New Jersey	236	11%
Connecticut	154	7%
Canada	119	6%
Pennsylvania	105	5%
Massachusetts	92	4%
Florida	30	1.4%
Mid-West (Ohio, Illinois, Iowa, Indiana, Michigan, Minnesota, Missouri, Oklahoma, Wisconsin)	66	3%
New England (RI, VT, NH, ME)	59	2.8%
Mid-Atlantic (DE, DC, VA, MD, WV)	43	2%
Western USA (Arizona, New Mexico, CA, Colorado, Nevada, Texas, Oregon, WA)	43	2%
Southern States (AL, GA, KY, NC, SC, TN, Mississippi)	41	1.8%
International (Denmark, England, Germany)	9	.4%

Please provide your contact information IF you wish to be included in the drawing for a signed and framed Carl Heilman canvas print of scenic Lake George, value \$250. Also, be sure to fill in the contact information if you would like to be included in future emarketing of Warren County area promotions.

1,547 people responded to this question, 99.29% gave names, 99.61% gave email addresses, and 89.33% gave their phone numbers.

Would you like to receive future travel and event information about Warren County/The Lake George Area?



# 5. Attractions Survey Report

## ATTRACTIONS SURVEY

### Research Purpose

A survey was conducted with the community and travel industry leaders of Warren County to gather their input regarding Warren County Tourism and the direction of the organization moving into 2017 and beyond.

### Research Methodology

An online survey was distributed by email on June 21st, with reminders sent June 28th, July 20th, September 12th, and September 30th to individual sites and attractions. The contact list was provided by Warren County Tourism. Two emails bounced, and thus a total of 151 survey invitations were successfully emailed. The survey was completed by a total of 43 people.

### Summary of Findings

- Geographic location of respondents
- Primary category of attraction or business
- Gate count
- Percentage of business attributed to day trip visitors
- Percentage of occupancy and what it's driven by
- Percentage of repeat business
- Acceptance of motor coach group tour business
- Number of coaches visited in 2015
- Location that majority of guests originate from
- Business trends and indicators
- Perception of Warren County as a place to live, work and visit
- Visitation satisfaction level
- Current major event appeal to travelers
- Initiative priority level
- Regional markets/cities Warren should target
- Travel market segments to target for future growth
- Recommendations regarding sales strategies
- What words used to describe Warren County
- What makes Warren County a unique travel destination
- Specific topics/issues to consider addressing in the long range plan

Pick one of the communities in which your property is located. It is essential that you identify your community!

Answer Choices	Responses	
Bolton	15.00%	6
Chester	0.00%	0
Hague	0.00%	0
Horicon	2.50%	1
Johnsburg	7.50%	3
Lake George Town	7.50%	3
Lake George Village	12.50%	5
Lake Luzerne	5.00%	2
Pottersville	2.50%	1
Queensbury	15.00%	6
Stony Creek	2.50%	1
Thurman	7.50%	3
Warrensburg	2.50%	1
Diamond Point	2.50%	1
City of Glen Falls	17.50%	7
<b>Total</b>		<b>40</b>

Please identify your primary category of attraction or business (i.e., Amusement, culture, outdoors, performing arts, shopping, recreation, dining)

- Recreation
- Agritourism
- Tourist attraction
- Outdoor
- Rafting
- Recreation
- Agricultural
- Rooms/Recreation/Dining
- Arts
- Dude ranch resort
- Outdoor Recreation
- Children’s Museum
- Winery
- Recreation
- Fitness and outdoor guiding
- Hot Air Ballooning (which gets LOST under Outdoor Rec - Sky Adventures)
- Outdoor Recreation - paddle sports
- Historical Society and Museum
- HISTORY MUSEUM
- Shopping
- Indoor and outdoor sports training, leagues, tournament for softball, soccer, baseball, field hockey and lacrosse
- lodging
- Hotel
- Public library
- Performing arts
- Outdoors
- Agriculture

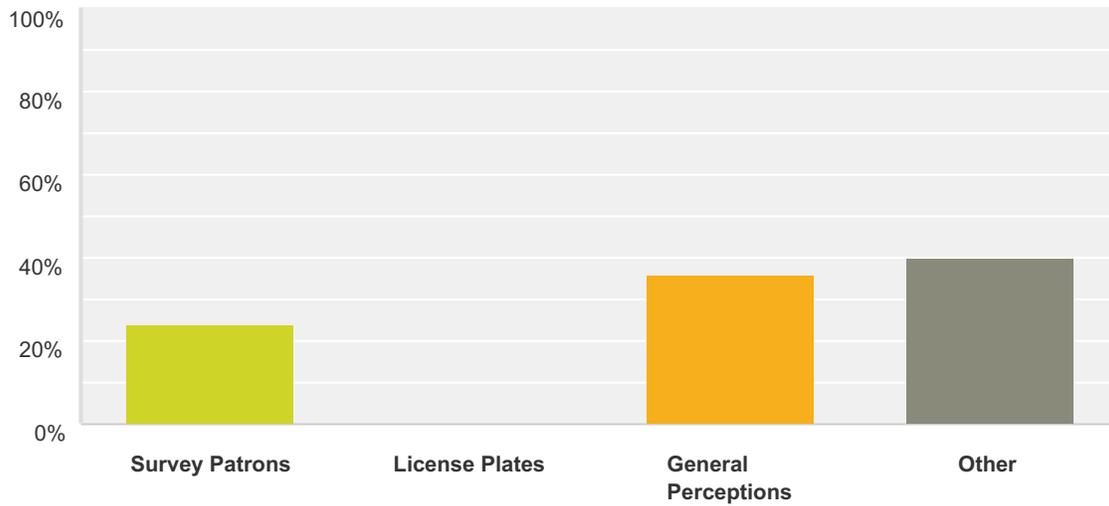
### What was your gate count from 01/01/2015 - 12/31/2015?

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• 140</li> <li>• Approximately 25,000</li> <li>• 32000</li> <li>• 3350</li> <li>• N/A</li> <li>• 20,116</li> <li>• n/a We are the new owners as of March 2016</li> <li>• 2300</li> <li>• 8120</li> <li>• 65,000</li> <li>• 173,822</li> </ul> | <ul style="list-style-type: none"> <li>• 6000</li> <li>• ~500</li> <li>• approx. 2,100</li> <li>• 6000+</li> <li>• 734</li> <li>• 500,000+</li> <li>• ~ 125,000 to 150,000</li> <li>• 350 families</li> <li>• N/A</li> <li>• 412185</li> <li>• 10,000 plus</li> <li>• Do Not Know</li> </ul> |
|--|--|

### What percentage of your business is attributed to day trip visitors?

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• 20%</li> <li>• 50%</li> <li>• No idea</li> <li>• 20%</li> <li>• 100%</li> <li>• &lt;10%</li> <li>• Farmers Market</li> <li>• 2% Dining/Recreation</li> <li>• 36%</li> <li>• &lt;5%</li> <li>• 50%</li> <li>• 30% in summer, 10% school yr</li> </ul> | <ul style="list-style-type: none"> <li>• 60% tourists / 40% locals</li> <li>• 58%</li> <li>• 75%</li> <li>• ~75%</li> <li>• 40 - 50 %</li> <li>• 50/50%</li> <li>• 37%</li> <li>• 50%</li> <li>• 10%</li> <li>• 0%</li> <li>• 50%</li> <li>• 20%</li> </ul> |
|---|---|

### How did you determine this?



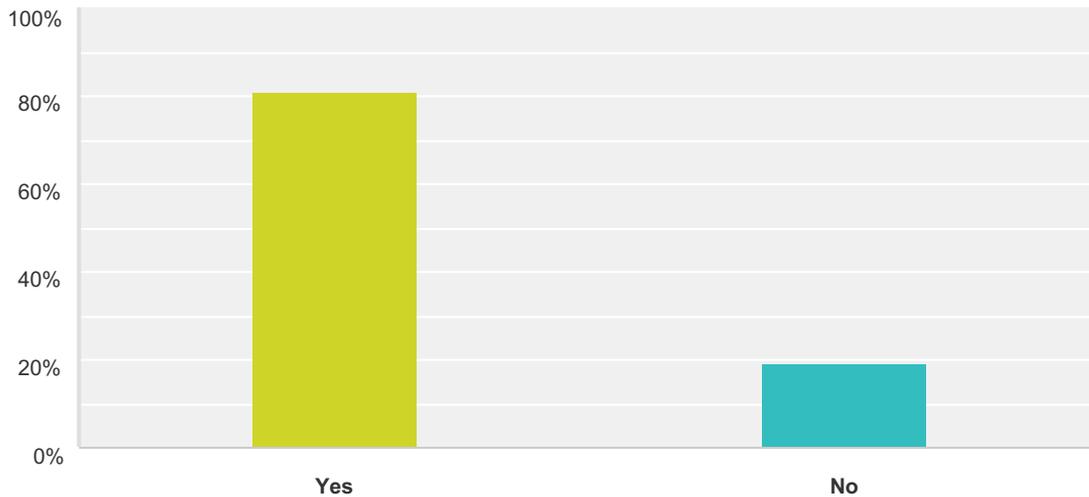
### What percentage of occupancy is driven by the market segments below?

Business:	54.17%
Weddings:	50.00%
Conference/Meetings:	33.33%
Group Tours:	58.33%
Family Events:	66.67%
Tourists visiting local sites and attractions:	91.67%
Visiting local friends and relatives:	70.83%
Transient (passing through):	62.50%
Recreational Outdoor Activities (biking, hiking, swimming, skiing, etc):	54.17%

What percent of your business is repeat business?

- 40%
- 75%
- 18%
- 50%
- 40%
- 35%
- 65%
- 70%
- 90%
- 25%
- No data
- 50%
- 75%
- 10%
- 5%
- 50% plus
- 15-20%
- 50%
- 50%
- 75%
- 20%
- 30%
- 90%
- 65%
- 75%
- 50%

Do you accept Motor coach group tour business?



How many coaches visited your property from 01/01/2015 – 12/31/2015?

- 0
- 3
- 10
- 3
- 0
- 10
- 9
- n/a
- 10
- 0
- 13
- 55
- 0
- Several at Balloon Festival Time
- 3
- 0
- Est 100
- 0
- 0
- 10
- 0
- 1
- 1
- 3

Please estimate what percentage of your guests originate from the following states/provinces:

New York

40	75	58	80	60	80	25
43	58	15	51	70	75	76
90	50	80	77	60	70	55
29	95	50	80			
60 (living in New York)	but from other countries)					

New Jersey

40	5	30	5	20	5	35
30	2	5	12	2	10	11
3	20	20	5	5	3.5	4
33	1	15	10	5		

Vermont

2	5	5	5	2	2	2
1	1	5	10	5	.5	2.8
2	2	9	2	2		

Connecticut

10	4	5	15	10	1	50
7	2	5	3	3	5	10
5	2	2.5	12	5	3	5
10						

**Massachusetts**

10	2	10	5	25	7	2
5	2	5	2	3	10	5
5	4	1.7	8	2	3	1
5						

**Ohio**

15	.2	1	.5	.5	<5	<1
1	1	0	1			

**Quebec**

2	4	5	5	1	25	.2
12	.5	.25	1	<5	2	16.7
2	1	13	1			

**Ontario**

2	5	0	.7	.5	1	<5
1	4.6	1	2	1		

**Pennsylvania**

3	10	40	3	1.3	5	3
1	3	<5	2	1	2	1
8						

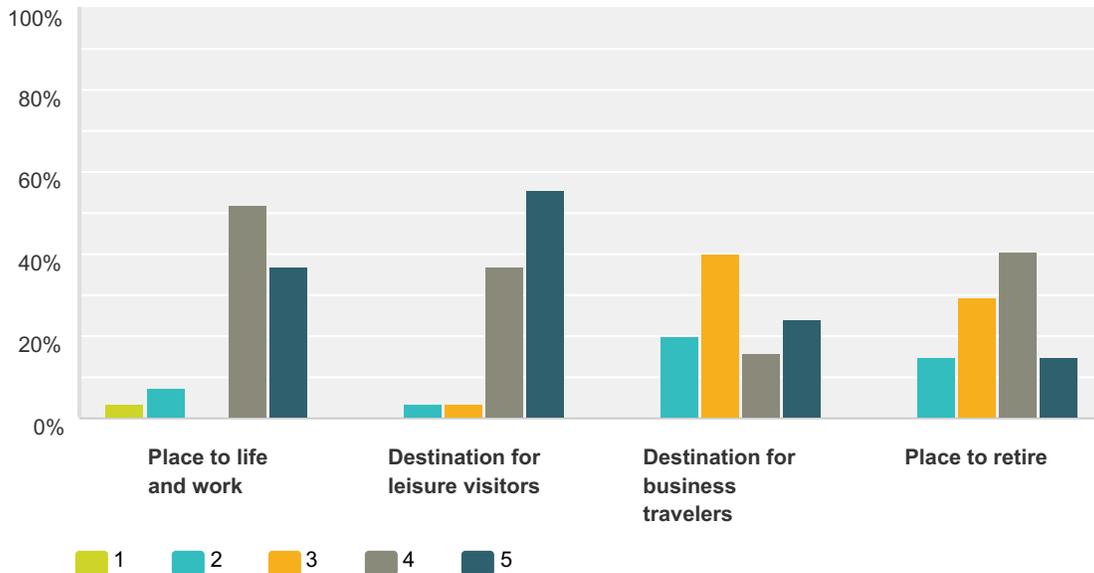
**Other**

10
5% different countries
Montreal, 2%
10- rest of world (these are summer figures)
1 - Other
NYC & Long Island each are about 8% of our revenue, so 16% out of metro NY
5, international
5 (other USA states)
RI 1%
.5 national
10% west coast, Alaska, Florida, Texas, other states

### Are there any business trends or indicators you wish to share or report?

- Large % Indian (India) and Asian visitors for holiday weekends.
- No
- Rafting #'s have not changed in 10-15 years
- Much heavier use of credit cards over previous year
- Staycations seem to be the direction - instead of going overseas or flying long distances. Probably related to the terrorism and uncertainty of Presidential election.
- Weather patterns are becoming more extreme. People want information and service quicker than we are providing. Vacation planning is still harder than it should be, from WC to Disney World.
- No
- It would help our business if [www.VisitLakeGeorge.com](http://www.VisitLakeGeorge.com) made it possible/EASIER to find Hot Air Balloon Flight info.
- More last minute planning every year, higher cancellations/no shows
- no
- internet purchasing up, need more Outlets
- Our weekend tournaments are ~ 75% out of town teams and their families, while our weekday activities are nearly 100% local individuals.
- economy is good so spending is up
- Canadian Exchange Rate is impacting travel
- virtual usage
- Actually most of our customers are foreigners now
- No

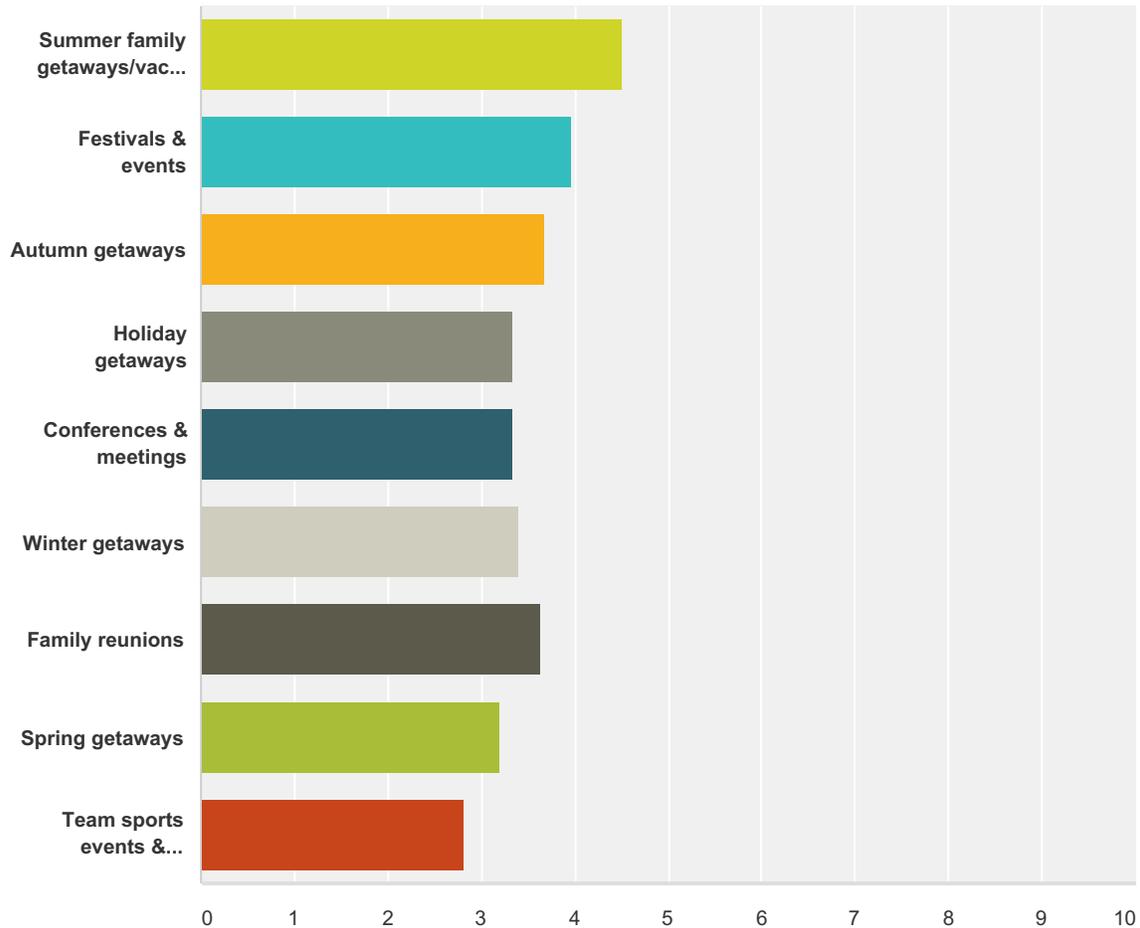
Rate your current perception of Warren County as a place to live, work, and visit. Use a 5 point scale where 1=poor, 3= average and 5=excellent.



When friends, family or business guests visit you, please rate your level of satisfaction with the following Warren County experiences. Use a 5-point scale where 1=poor, 3=average and 5=excellent.

	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	Mean
Summer sports and outdoor activities	0.00% 0	3.70% 1	3.70% 1	29.63% 8	62.96% 17	4.52
Historic and heritage activities	0.00% 0	3.85% 1	15.38% 4	30.77% 8	50.00% 13	4.27
Waterfront lake activities	3.85% 1	0.00% 0	0.00% 0	57.69% 15	38.46% 10	4.27
Winter sports and outdoor activities	0.00% 0	8.33% 2	20.83% 5	33.33% 8	37.50% 9	4.00
Activities for children	0.00% 0	0.00% 0	26.92% 7	42.31% 11	30.77% 8	4.04
Farmer markets and culinary activities	4.00% 1	8.00% 2	36.00% 9	32.00% 8	20.00% 5	3.56
Festivals and events	0.00% 0	4.00% 1	36.00% 9	40.00% 10	20.00% 5	3.76
Casual dining	4.00% 1	0.00% 0	24.00% 6	52.00% 13	20.00% 5	3.84
Arts and cultural activities	0.00% 0	8.33% 2	33.33% 8	37.50% 9	20.83% 5	3.71
Guided tours	0.00% 0	16.67% 4	37.50% 9	25.00% 6	20.83% 5	3.50
Fine dining	12.00% 3	4.00% 1	36.00% 9	32.00% 8	16.00% 4	3.36
Large scale retail shopping	0.00% 0	0.00% 0	60.00% 15	24.00% 6	16.00% 4	3.56
Unique local shopping	4.00% 1	12.00% 3	44.00% 11	24.00% 6	16.00% 4	3.36
Evening / nighttime entertainment	4.00% 1	20.00% 5	44.00% 11	20.00% 5	12.00% 3	3.16

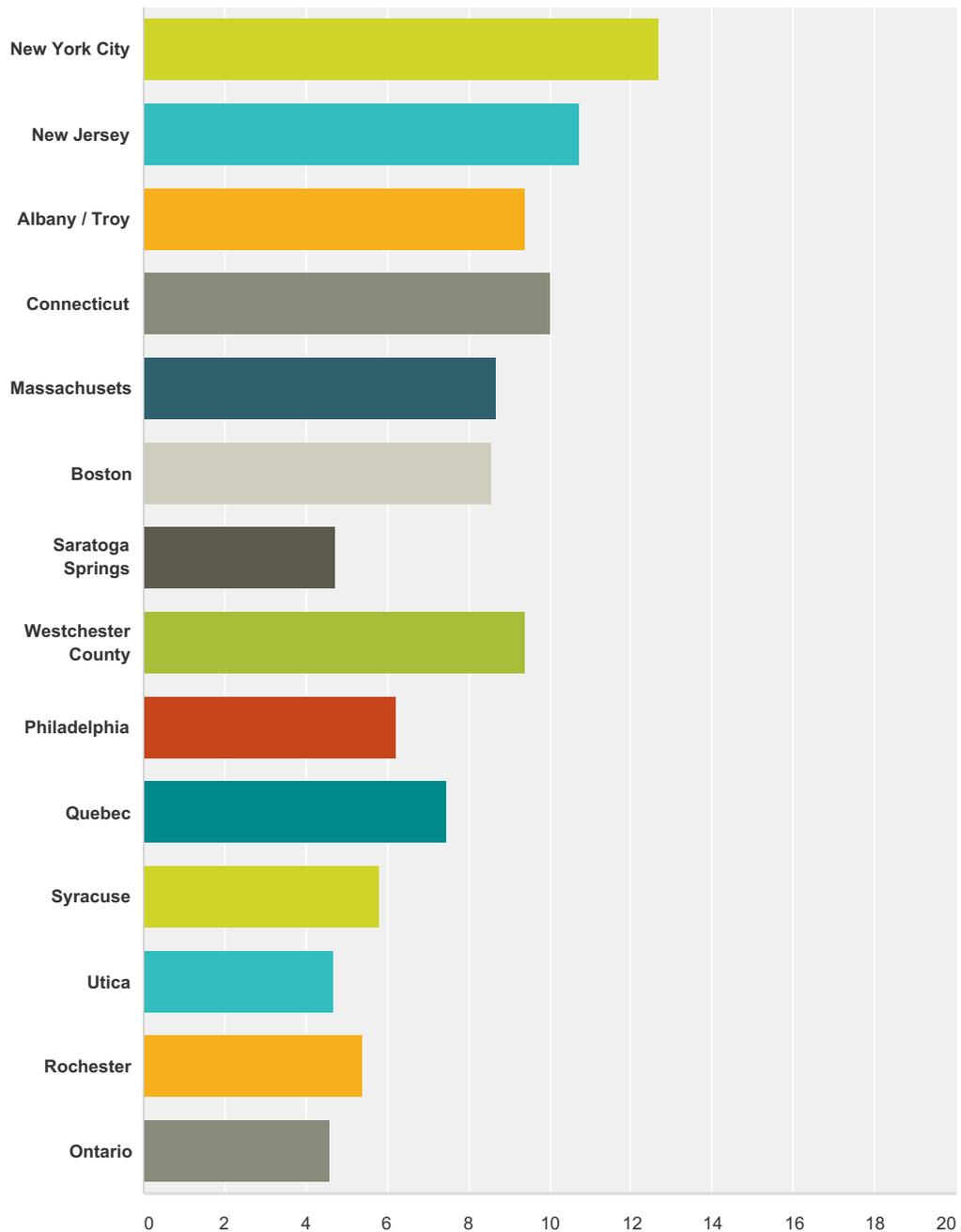
Following is a list of current major events and areas of visitor interest in Warren County. Please indicate for each whether you see its APPEAL TO TRAVELERS as declining, remaining the same or growing OVER THE NEXT FIVE YEARS. Use a 5-point scale where 1=poor, 3=average and 5=excellent. (Select N/A if you are unfamiliar with that one)



Please indicate your level of priority for the following POSSIBLE initiatives for Warren County as a destination in the coming decade. Use a 5-point scale where 1=poor, 3=average and 5=excellent.

	1	2	3	4	5	Total
Enhance the visitor experience	0.00% 0	0.00% 0	15.38% 4	38.46% 10	46.15% 12	26
Enhance quality of workforce and training	0.00% 0	3.85% 1	23.08% 6	38.46% 10	34.62% 9	26
Add new shopping/dining/lodging	0.00% 0	19.23% 5	46.15% 12	26.92% 7	7.69% 2	26
Public trans. to connect certain Warren County communities	3.70% 1	18.52% 5	22.22% 6	25.93% 7	29.63% 8	27
Develop Warren County into a year-round destination	3.70% 1	0.00% 0	22.22% 6	11.11% 3	62.96% 17	27
New destination resort lodging	7.69% 2	19.23% 5	38.46% 10	26.92% 7	7.69% 2	26
New attractions/activities	0.00% 0	7.69% 2	34.62% 9	38.46% 10	19.23% 5	26
New meeting/conference center	0.00% 0	20.00% 5	28.00% 7	12.00% 3	40.00% 10	25
New performance venues	4.00% 1	16.00% 4	48.00% 12	16.00% 4	16.00% 4	25
New health/wellness offerings	19.23% 5	15.38% 4	30.77% 8	23.08% 6	11.54% 3	26
New tournament level sports facilities	7.69% 2	19.23% 5	30.77% 8	26.92% 7	15.38% 4	26
Keep Warren County the same	50.00% 13	7.69% 2	30.77% 8	7.69% 2	3.85% 1	26

What regional markets/cities (in rank order) should Warren County Tourism target for direct sales efforts to attract travelers as groups or individuals? Use 1 to indicate your first choice, etc.



Please rank the travel market segments Warren County Tourism should target for FUTURE growth through direct sales efforts. Use a 5-point scale where 1=Do not consider, 2=Not really important, 3=Some consideration, 4=Important and 5=Most important.

	1	2	3	4	5	Total
Individual and family leisure travelers	0.00% 0	4.17% 1	4.17% 1	8.33% 2	83.33% 20	24
Corporate groups	0.00% 0	4.00% 1	44.00% 11	24.00% 6	28.00% 7	25
Tourists visiting friends & relatives	0.00% 0	8.33% 2	16.67% 4	45.83% 11	29.17% 7	24
Association groups	0.00% 0	0.00% 0	43.48% 10	30.43% 7	26.09% 6	23
Weddings / reunions/family events	4.00% 1	0.00% 0	28.00% 7	48.00% 12	20.00% 5	25
LGBT Groups	4.17% 1	8.33% 2	33.33% 8	33.33% 8	20.83% 5	24
Group tour / motorcoach	0.00% 0	12.00% 3	32.00% 8	40.00% 10	16.00% 4	25
Transient travelers	8.70% 2	13.04% 3	30.43% 7	30.43% 7	17.39% 4	23
Government groups	8.70% 2	17.39% 4	43.48% 10	17.39% 4	13.04% 3	23
Team sports & tournaments	8.33% 2	12.50% 3	37.50% 9	29.17% 7	12.50% 3	24
Individual business travelers	26.09% 6	17.39% 4	43.48% 10	8.70% 2	4.35% 1	23

Please indicate your recommendation to Warren County Tourism related to the following sales strategies in terms of importance for the Warren County marketing team. Use a 5-point scale where 1=Do not consider, 2=Not really important, 3=Some consideration, 4=Important and 5=Most important.

	1	2	3	4	5	Total
Maintain relationships for repeat business	0.00% 0	0.00% 0	7.69% 2	30.77% 8	61.54% 16	26
Increase social media presence	0.00% 0	0.00% 0	11.54% 3	38.46% 10	50.00% 13	26
Increase internet presence	0.00% 0	0.00% 0	15.38% 4	42.31% 11	42.31% 11	26
Coordinate electronic co-op advertising	0.00% 0	8.00% 2	28.00% 7	20.00% 5	44.00% 11	25
Participate in trade shows for group business	3.85% 1	15.38% 4	15.38% 4	38.46% 10	26.92% 7	26
Consumer shows for leisure travelers	4.00% 1	12.00% 3	24.00% 6	36.00% 9	24.00% 6	25
Coordinate print co-op advertising	7.69% 2	7.69% 2	34.62% 9	38.46% 10	11.54% 3	26
Organize sales blitzes to regional markets	0.00% 0	16.00% 4	24.00% 6	40.00% 10	20.00% 5	25
Increase print advertising in trade journals	12.00% 3	16.00% 4	44.00% 11	24.00% 6	4.00% 1	25
Phone prospecting for new business	23.08% 6	38.46% 10	26.92% 7	3.85% 1	7.69% 2	26
Cold calls in the field	60.00% 15	20.00% 5	16.00% 4	0.00% 0	4.00% 1	25

### What words would you use to describe Warren County to a friend or colleague who has never been to Warren County?

- there is always something going on
- Great place to get away. Lots to do.
- Southern Adirondacks, Upstate NY, In between Montreal & NYC,
- outdoors!
- outdoorsy
- Touristy
- Beautiful with a wealth of options for everyone
- Beautiful, peaceful, healthy, remote
- God’s Country! Lake George is one of the most beautiful places on earth! 4 seasons of outdoor activities, enhanced by a magnificent selection of restaurant, theater, educational, cultural, event, etc. activities.
- unique
- Has it all. Winter time be active or you’ll get cabin fever.
- wonderful sport-filled area
- LAKES RIVERS MOUNTAINS NATURAL HISTORY
- nature, sports, lakes, mountain, seasonal
- Great Summer Place & Quality of Life
- Beautiful
- nature, vacationland
- Natural beauty, Great Lakes, lots of activities
- comfortable

What makes Warren County a unique travel destination? (Please use single words or short phrases)

- Lake George
- Our lakes and outdoor activities
- Revolutionary war history, accessible ADK experiences, Adirondack natural wonder
- Lake George and the mountains
- environment
- Corporate America hasn't found it yet
- Maple industry
- Scenic beauty
- Combination of arts, recreation, and nature
- Climate
- Great location with great activities
- Lake George
- Diverse four-season activities and lodging that are family-oriented, affordable. The convenient access to WC from large population bases is valuable.
- Outdoor opportunities
- Lake George, God's Country, + pls see above.
- Adirondacks, Lakes, Rivers yet close to cities.
- Lake George and the surrounding area
- PRISTINE UNCROWDED
- mountains, geographic location, family friendly
- nature, sports, lakes, mountain, seasonal
- Mountains and Water...
- Attractions, Lake George, Activities
- a little bit of everything
- Lake George, ADK mountains, culture, shopping, dining, a variety of activities
- The lake and mountains

## Are there other specific topics or issues you would like to be addressed in the Warren County long range plan?

- winter activities (Mayor mentioned an extensive xmas light display set to music)  
GREAT IDEA
- Agritourism
- It is amazing how VT and NH have such busy fall visitation (all Fall, not just special events). Need more all season lodging, activities.
- Modernize the advertising as the people visiting are used to the modern communication
- Help Maple producers
- We should have a coordinated effort in our Warren County Tourism office to absorb the CVB and have representatives selling to Group/Bus Tours/Social (weddings, family reunions) and leisure. We need to have a conference center built in Lake George to compete with Saratoga and Lake Placid as large group destinations to help make us a year round location!
- Trolley transport to various sites from resorts: Garnet mine, horse stables, golf courses downtown etc.
- Increased occupancy tax support
- Targeting a younger, more affluent demographic needs to be a priority in all marketing
- How to tailor more specific messaging to certain audiences, providing better concierge-type experiences online, giving WC businesses access to current customer service/social media training
- Sustainability, protecting this beautiful area for future generations, natural food choices
- Invasive species abatement
- year round activities & draws for area
- A 3rd party, private organization need to take over the marketing AND SALES activities for Warren County. Currently there is a tone of disjointed and uncoordinated marketing efforts going on within Warren County. These need to have a coordinated focus and there needs to be a sales team established.
- Focus on The Summer Season and don't worry about the shoulder seasons...push heavier in the summer and it will over flow at a percentage rate. The culture sets the vacation cycle around school, so the more we accept the phenomenon of this cycle and max it out the better the shoulder seasons will be. To max out money on the shoulder seasons will not help the summer...
- Specific marketing plan to drive trial visitation to our area
- Lake George Village needs to more quaint like Bolton Landing and Saratoga with sidewalk cafes, music, unique shops. Not cheap tourist traps, selling the same items in every store. We are losing the traditional tourist and getting large groups that come but don't really spend money. We need to offer them more access to the lake for those not staying on the lake. Maybe nice restaurants for dining on the lake as well.

# 6. Peer Comparisons

## CONTENTS

### Peer Set Occupancy Tax trends and Allocation Structures

6.2

- Saratoga County and Saratoga Springs
- Essex, Franklin, and Hamilton Counties
- Hershey/Dauphin County
- Albany/Schenectady
- Upstate New York
- Side by side Comparison

### Competitive Analysis: Recommendations for Warren County and Important Takeaways

6.18

- Sample recommended reports
- Budget to Midscale Properties vs. Mid to Upper scale...the tale of two different occupancy trends
- Recommendations for the Tourism Department

## **SARATOGA COUNTY CONVENTION & TOURISM BUREAU (CVB)**

### **Primary Mission**

Group Market

### **Occupancy Tax**

Within Saratoga Springs, 6% bed tax.

- CVB gets 2%, City Center (Convention Center) gets 2%, City of Saratoga Springs gets 1%, county gets 1%.

Outside of Saratoga Springs, county bed tax is 1%.

- All tax funds go to Saratoga County's General Fund. A portion goes to the Chamber (TPA for county). Balance goes to Saratoga County Prosperity Partnership, which is the economic development arm for the county.

### **Funding**

As a result of legislation passed 25 odd years ago, the CVB can count on receiving 33% of the hotel tax collected each year for its annual budget. As long as visitation and occupancy tax goes up, the CVB budget goes up.

### **Budget**

Total annual budget is determined by the bed tax (86%), a small portion of membership dues (12%), with the rest derived from co-op sponsorships, etc.

Overall budget is \$1.5 million for 2016. 48-49% goes to marketing. Local sales and promotion have their own budgets. Remaining dollars go to salary, staff, and general overhead.

### **Sponsorships/Allocations**

Occupancy tax dollars are primarily kept within the CVB.

Within the last couple of years, the CVB has provided some underwriting for events to help them come into county, but only on a small scale – and the event has to meet certain criteria. Supported events are required to be multiple property or city-wide, group-oriented, and not tax exempt. They must generate tax.

The CVB will help various sites, attractions, etc., by writing Letters of Support, but does not provide funding.

No occupancy tax money goes out to townships.

The CVB itself determines whether an event is funded or not.

### **Staff**

8 full-time: 4 sales people, 1 marketing, 1 membership, 1 office manager, 1 administrative.

Last year (2015) the CVB took over management of the Visitor Center. City of Saratoga Springs pays them \$70K/year. The CVB puts in \$20K from their own budget. Two FT and two PT staff are dedicated to running the Visitor Center.

## SARATOGA COUNTY CHAMBER OF COMMERCE (TPA)

### Primary Mission

Leisure travel – county-wide tourism marketing to put heads in beds

### Occupancy Tax

Outside of Saratoga Springs, county bed tax is 1%.

- All tax funds go to Saratoga County's General Fund. A portion goes to the Chamber (TPA for county). Balance goes to Saratoga County Prosperity Partnership.

### Governance / Structure

Board of Supervisors. Chamber reports to them a few times a year on programming and media spend. Board is not involved in day-to-day operations or staffing decisions.

### Funding

Every year, the Chamber has to go to the Board of Supervisors to re-apply as the TPA for the county, and submit a funding request for their annual budget. The Chamber has had this Private/Public partnership with the county for 25 years. Previously, the county was doing its own tourism marketing, and the chamber was also investing in marketing. Saratoga County decided to hand over responsibility for tourism marketing to the chamber at that time. The move reduced duplication and saved some money.

### Budget

Annual budget is determined by TPA and requested from the county. Additional funds are derived from I Love NY matching funds – \$ 61,198 – as well as monies raised from businesses through a coop advertising program. Attractions and hotels – 11 partners in all currently – provide an additional \$5K each.

TPA had asked for additional funds for 2016 to help drive occupancy with all the new room nights on the market, but was denied. Occupancy is down, and TPA expects ADR will be lower in the Fall than last year.

Overall budget is about \$375,000 for 2016. 90% of the tourism money received goes to tourism marketing. Around 10% goes to administrative support – fulfilling mailings, minor research. Administrator's salary is covered by the Chamber. This past year, the county shaved off about \$30K for the Southern Saratoga Chamber of Commerce.

### Event Sponsorships/Allocations

Some attractions and events may have received funding in the past – but no longer do.

Any entity that desires funding must submit a request for funding to the county, as the TPA does.

No occupancy tax money goes out to townships.

### Staff

Administrator full-time salary is paid by the Chamber. Part-time administrative support as needed.

## Saratoga County STR - % Rooms STAR Participants: 2015/2016 approximately 78%

TPA had asked for additional funds for 2016 to help drive occupancy with all the new room nights on the market, but was denied. Occupancy is down, and TPA expects ADR will be lower in the Fall than last year. We can see how their numbers have dipped in all categories. This is a cautionary tale for Warren County. Overbuilding will not help drive increased occupancy.

Occupancy (%)									
	January	February	March	April	May	June	July	August	September
2010	39.4	45.2	49.3	54.1	61.0	71.1	73.2	80.0	67.6
2011	38.7	45.9	51.3	58.8	64.3	74.3	79.8	86.7	80.5
2012	49.7	55.9	59.2	65.1	67.1	77.5	79.3	85.0	72.2
2013	45.6	51.6	56.4	66.1	67.4	74.6	81.7	87.6	74.2
2014	47.0	57.0	62.8	68.4	72.6	80.5	82.1	89.7	77.3
2015	53.7	62.2	67.4	73.0	73.7	79.1	81.0	84.3	72.6
2016	41.5	50.5	54.7	60.4	67.8	73.9	74.5	81.4	68.2
Avg	45.2	52.7	57.5	63.8	67.9	75.9	78.7	85.0	73.2

ADR (\$)									
	January	February	March	April	May	June	July	August	September
2010	92.80	94.95	97.49	101.27	120.30	127.05	144.28	192.65	125.06
2011	91.29	97.18	97.93	102.00	117.66	121.20	148.23	193.99	127.93
2012	99.18	103.40	105.96	110.97	127.52	131.54	162.91	206.05	132.05
2013	104.23	108.84	107.76	115.48	134.22	131.84	171.01	220.03	135.14
2014	105.64	110.55	110.21	115.87	140.55	140.08	180.58	227.89	136.17
2015	110.90	116.67	116.97	125.32	141.84	142.18	178.77	234.70	155.22
2016	109.57	114.41	116.35	126.42	140.80	146.97	186.77	230.09	149.14
Avg	102.81	107.58	108.51	115.00	132.83	135.10	168.78	215.06	137.24

RevPAR (\$)									
	January	February	March	April	May	June	July	August	September
2010	36.57	42.93	48.02	54.75	73.39	90.33	105.62	154.19	84.58
2011	35.35	44.60	50.19	59.95	75.66	90.02	118.27	168.15	102.98
2012	49.29	57.78	62.77	72.22	85.55	101.92	129.13	175.22	95.33
2013	47.56	56.15	60.75	76.34	90.49	98.30	139.70	192.77	100.26
2014	49.66	63.02	69.25	79.21	102.00	112.79	148.28	204.35	105.22
2015	59.50	72.56	78.78	91.43	104.54	112.48	144.86	197.79	112.63
2016	45.50	57.78	63.68	76.30	95.46	108.64	139.20	187.25	101.77
Avg	46.43	56.72	62.39	73.37	90.15	102.60	132.91	182.82	100.40

Supply									
	January	February	March	April	May	June	July	August	September
2010	74,090	66,892	74,648	75,000	78,833	76,290	78,833	78,833	76,290
2011	74,059	66,892	74,648	75,000	78,833	76,290	78,833	78,833	76,290
2012	77,283	69,804	77,872	78,060	81,995	79,350	81,995	81,995	79,350
2013	77,221	69,748	77,810	76,890	80,786	78,180	80,786	80,786	78,180
2014	77,221	69,748	77,810	76,890	85,746	82,980	85,746	85,746	82,980
2015	82,181	74,200	87,358	86,130	90,334	90,270	93,589	93,589	90,570
2016	90,024	81,312	88,350	89,280	93,589	90,570	101,246	104,563	101,190
Avg	78,868	71,228	79,785	79,607	84,302	81,990	85,861	86,335	83,550

Demand									
	January	February	March	April	May	June	July	August	September
2010	29,200	30,243	36,772	40,545	48,095	54,241	57,706	63,097	51,593
2011	28,680	30,697	38,260	44,081	50,688	56,666	62,902	68,331	61,413
2012	38,412	39,005	46,134	50,806	55,009	61,482	64,994	69,727	57,287
2013	35,234	35,982	43,865	50,829	54,465	58,293	65,995	70,774	58,001
2014	36,299	39,765	48,895	52,561	62,226	66,812	70,408	76,887	64,117
2015	44,095	46,150	58,839	62,837	66,575	71,415	75,837	78,870	65,722
2016	37,381	41,064	48,355	53,889	63,450	66,949	75,458	85,093	69,045
Avg	35,614	37,558	45,874	50,793	57,215	62,265	67,614	73,254	61,025

Revenue (\$)									
	January	February	March	April	May	June	July	August	September
2010	2,709,826	2,871,479	3,584,951	4,105,893	5,785,907	6,891,191	8,325,955	12,155,455	6,452,236
2011	2,618,317	2,983,253	3,746,649	4,496,304	5,964,147	6,867,865	9,323,873	13,255,397	7,856,511
2012	3,809,615	4,033,013	4,888,357	5,637,732	7,014,845	8,087,149	10,588,299	14,367,207	7,564,606
2013	3,672,308	3,916,355	4,726,688	5,869,966	7,310,409	7,685,318	11,286,079	15,572,748	7,838,223
2014	3,834,483	4,395,836	5,388,546	6,090,176	8,745,831	9,359,014	12,714,258	17,521,942	8,730,807
2015	4,890,116	5,384,153	6,882,478	7,874,460	9,443,121	10,153,961	13,557,742	18,511,116	10,201,187
2016	4,095,743	4,698,287	5,626,132	6,812,394	8,934,010	9,839,670	14,086,925	19,579,064	10,297,708
Avg	3,661,487	4,040,339	4,977,686	5,840,989	7,599,753	8,412,024	11,411,876	15,851,847	8,420,183

## Saratoga Springs

Occupancy (%)									
	January	February	March	April	May	June	July	August	September
2010	42.5	47.9	52.4	57.3	63.3	75.1	75.6	83.0	69.7
2011	36.4	45.4	50.8	61.6	65.4	76.2	82.3	87.4	81.8
2012	50.6	55.4	61.4	67.2	68.0	78.3	80.7	87.2	73.2
2013	44.2	52.5	58.7	67.5	68.2	75.1	82.9	89.2	75.5
2014	45.0	55.2	60.8	68.6	75.0	81.2	81.1	90.3	76.7
2015	51.5	60.4	64.6	72.8	73.2	82.6	83.2	86.6	76.4
2016	43.1	51.1	58.1	64.5	69.9	77.1	79.1	85.9	74.8
Avg	44.7	52.5	58.2	65.7	69.1	78.0	80.7	87.1	75.4

ADR (\$)									
	January	February	March	April	May	June	July	August	September
2010	97.52	100.06	104.15	108.95	132.54	139.89	160.62	220.06	139.71
2011	97.13	104.23	104.97	108.34	129.34	132.64	164.05	220.73	141.77
2012	102.87	108.51	111.47	117.21	138.64	143.24	181.28	235.22	146.41
2013	108.67	115.16	112.68	122.65	147.63	142.96	191.94	253.66	149.17
2014	112.50	119.10	117.88	124.46	154.82	152.02	205.18	266.07	149.90
2015	115.32	123.42	122.81	132.89	154.51	153.07	199.50	270.19	171.11
2016	113.93	121.21	121.28	135.80	152.81	160.48	208.48	267.82	164.58
Avg	107.41	113.82	114.30	122.32	145.07	146.33	187.29	247.68	151.81

RevPAR (\$)									
	January	February	March	April	May	June	July	August	September
2010	41.46	47.91	54.56	62.47	83.85	105.04	121.38	182.63	97.31
2011	35.33	47.29	53.36	66.68	84.64	101.12	135.02	192.92	115.99
2012	52.05	60.14	68.48	78.79	94.23	112.09	146.27	205.00	107.10
2013	48.03	60.41	66.19	82.75	100.63	107.40	159.14	226.27	112.62
2014	50.65	65.79	71.67	85.41	116.08	123.51	166.33	240.19	115.03
2015	59.35	74.51	79.31	96.77	113.03	126.43	165.96	234.06	130.69
2016	48.81	61.64	70.02	87.63	106.85	123.66	164.66	230.04	123.04
Avg	48.02	59.77	66.51	80.39	100.19	114.18	151.25	215.87	114.54

Supply									
	January	February	March	April	May	June	July	August	September
2010	46,810	42,280	46,810	48,060	50,995	49,350	50,995	50,995	49,350
2011	46,810	42,280	46,810	48,060	50,995	49,350	50,995	50,995	49,350
2012	46,810	42,280	46,810	48,060	50,995	49,350	50,995	50,995	49,350
2013	46,810	42,280	46,810	46,890	49,786	48,180	49,786	49,786	48,180
2014	46,810	42,280	46,810	46,890	51,274	49,620	51,274	51,274	49,620
2015	48,298	43,624	52,917	52,800	55,893	54,090	56,203	56,203	54,390
2016	53,227	48,076	50,964	53,100	56,203	54,390	59,830	59,830	57,900
Avg	47,939	43,300	48,276	49,123	52,306	50,619	52,868	52,868	51,163

Demand									
	January	February	March	April	May	June	July	August	September
2010	19,901	20,245	24,521	27,557	32,260	37,057	38,537	42,321	34,373
2011	17,027	19,182	23,798	29,582	33,372	37,623	41,971	44,570	40,377
2012	23,683	23,432	28,757	32,305	34,658	38,618	41,147	44,444	36,101
2013	20,691	22,178	27,500	31,638	33,937	36,197	41,278	44,410	36,374
2014	21,076	23,355	28,460	32,178	38,445	40,312	41,567	46,288	38,078
2015	24,856	26,334	34,173	38,451	40,890	44,678	46,753	48,686	41,541
2016	22,803	24,450	29,423	34,265	39,298	41,912	47,308	51,390	43,286
Avg	21,434	22,739	28,090	32,282	36,123	39,485	42,652	46,016	38,590

Revenue (\$)									
	January	February	March	April	May	June	July	August	September
2010	1,940,723	2,025,692	2,553,807	3,002,468	4,275,799	5,183,792	6,189,625	9,313,085	4,802,185
2011	1,653,800	1,999,393	2,497,990	3,204,805	4,316,446	4,990,430	6,885,459	9,837,968	5,724,231
2012	2,436,318	2,542,697	3,205,400	3,786,508	4,805,108	5,531,821	7,458,977	10,454,118	5,285,372
2013	2,248,433	2,553,939	3,098,575	3,880,268	5,010,009	5,174,634	7,922,815	11,264,880	5,425,976
2014	2,371,095	2,781,503	3,354,882	4,004,971	5,951,904	6,128,355	8,528,565	12,315,680	5,707,822
2015	2,866,454	3,250,273	4,196,758	5,109,708	6,317,756	6,838,860	9,327,404	13,154,601	7,108,269
2016	2,597,917	2,963,496	3,568,385	4,653,160	6,005,226	6,726,035	8,514,486	13,763,198	7,123,905
Avg	2,302,106	2,588,142	3,210,828	3,948,841	5,240,321	5,796,275	6,737,762	11,443,361	5,882,537

## ROOST – TPA FOR ESSEX, FRANKLIN, AND HAMILTON COUNTIES

### Primary Mission

The Regional Office of Sustainable Tourism (ROOST)/Lake Placid CVB is a 501c6 not-for-profit corporation. ROOST is the accredited Destination Marketing Organization (DMO) for Lake Placid and Essex County, Franklin County and Hamilton County, as well as a few townships.

### Occupancy Tax

**Essex:** 3% bed tax.

**Franklin:** 5% bed tax.

**Hamilton:** NO occupancy tax.

### Governance / Structure

**Essex:** Board of Supervisors. ROOST reports once a month to the Economic Development Tourism and Planning Committee (a smaller segment of the full Board of Supervisors.)

**Franklin:** Board of Legislators. ROOST reports as needed, 3-4x/year, to the Board. In addition, ROOST meets with a Tourism Advisory Committee made up of hospitality and tourism businesses, 6x a year. This Committee has no legislative authority, but serves as an advisory peer group, and reports back to the Legislative Board.

**Hamilton:** Board of Supervisors, to whom ROOST reports quarterly. Hamilton also has a department of economic development and tourism, whose members collaborate with ROOST to help implement the program. The Tourism Committee of the Board of Supervisors acts as an Advisory Committee, to review expenditures, marketing plans, budgets, programs, and marketing activities, and provide recommendations.

### Funding

**Essex:** ROOST receives 95% of the occupancy tax collected, through a three year contract. In addition, tourism initiatives are funded through business participation in marketing initiatives, I Love NY Matching Funds, and commissions on convention sales. ROOST's data reports Essex County's 2015 budget as \$ 2,483,556.

**Franklin:** James McKenna stated that ROOST receives 90% of Franklin County's bed tax collected, with a five-year contract with ROOST as their designated TPA. ROOST's web site states that Franklin County provides a budgetary contribution of no more than \$139,000 from the general fund. Of this, \$77,000 is matched through the I Love NY Matching Fund Program to bring the full county marketing program to \$216,000.

**Hamilton:** Multi-year contract. Hamilton County supports the marketing efforts with a budgetary contribution of \$168,699 from the general fund. Of these funds, \$81,301 is matched through the I Love NY Matching Fund Program to bring the full county marketing program to \$250,000.

\$136,258 is expended through Regional Cooperative programs which market the Adirondacks as a whole through the work of the Adirondack Regional Tourism Council. The balance of \$113,742 is used to market Hamilton County as a tourism destination and support the Destination Master Planning programs.

## Budget

Annual budget is driven by formulas above. In addition, co-op advertising programs, private sponsorships, and digital ads contribute to the budget, as well as funds from some towns and villages.

Jim McKenna stated that the marketing budget is close to 70% of overall budget. Costs of staff directly related to marketing mission are included in the marketing budget.

## Sponsorships/Allocations

ROOST has a program with specific guidelines for funding events, and deliberately strives to keep politics out of funding decisions.

ROOST has broken up Essex into four regions, and provides funding to each area, out of the overall marketing budget. But, in order to qualify, projects must drive out-of-region travelers, show a return on investment, and support ROOST's marketing mission. If an event is purely local, ROOST won't fund it. This methodology is applied to all counties.

ROOST has also formed a 5013C6 corporation, through which they award grants. The grantee must follow the same guidelines as above.

## Staff

27 Full Time plus a couple of part timers and interns.

ROOST staffs four Visitor Centers throughout region. Another one is due to open soon.

## Lodging Supply

Bulk of lodging rooms are in Lake Placid.

Traditional Lodging Rooms: 3,500 – 4,000

The three counties have seen the most growth in private rentals. Franklin and Essex Counties implemented legislation in 2015 requiring private rentals to be subject to occupancy tax.

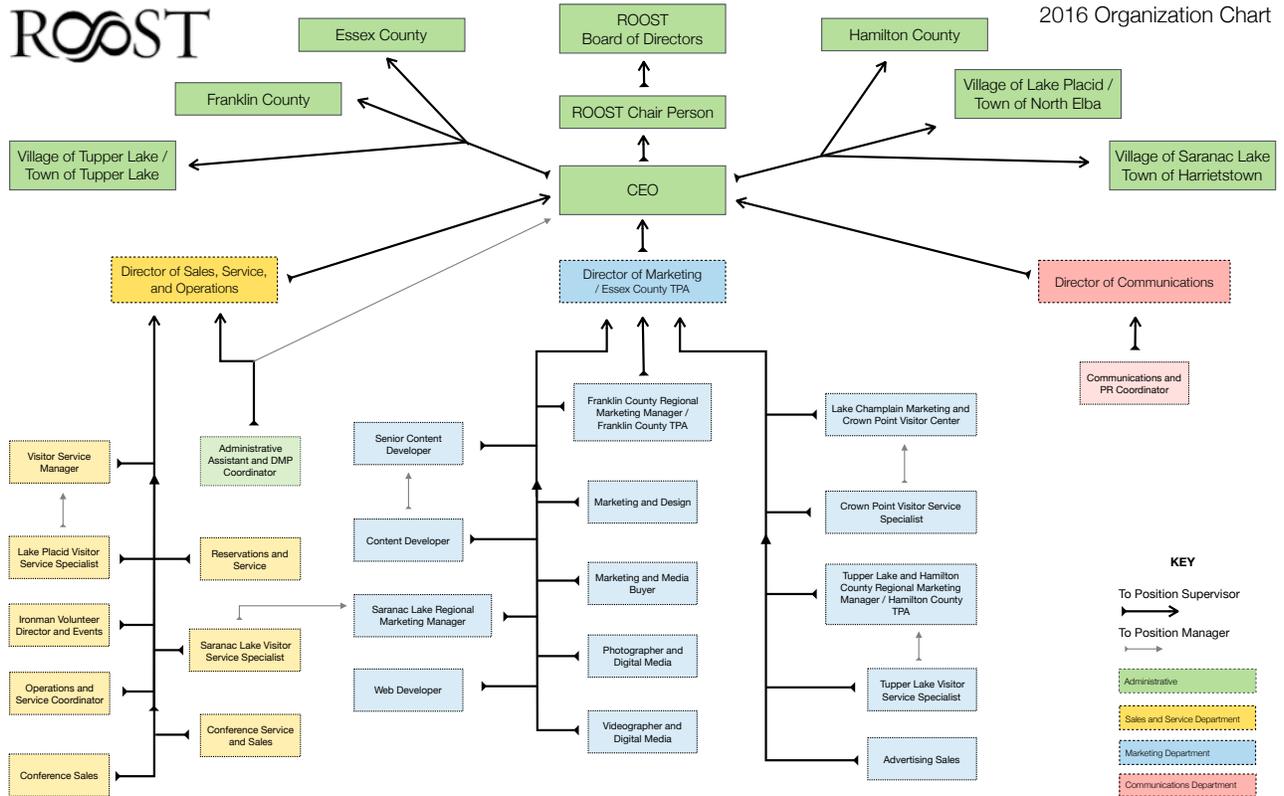
## Occupancy Issues

The STR reports work best for understanding greater Lake Placid, as there are sufficient franchised and larger properties to track through STR.

In Hamilton and Franklin counties, a good portion of the properties are seasonal or small lodgings, so there are not enough larger, franchised properties reporting to gain a clear picture of county occupancy through the STR reports. Now that private properties in Franklin and Essex are required to pay occupancy tax, reporting will be easier and more revealing in the future.

Branded properties are maintaining 60% and above occupancy rates.

Occupancy across the region has stayed pretty steady, with summer flat for about ten years. The area has experienced growth in Spring and Fall.



Source: ROOSTadk.com; interview with James McKenna, CEO, ROOST; County contracts with ROOST

## Essex County STR - % Rooms STAR Participants: 2015/2016 approximately 68%

Occupancy (%)									
	January	February	March	April	May	June	July	August	September
2010	43.1	50.5	48.0	36.5	43.6	60.9	75.3	80.9	62.4
2011	41.8	55.7	50.3	39.2	45.0	58.1	76.8	79.8	63.5
2012	42.1	51.0	49.8	38.8	46.9	60.0	75.3	82.0	61.5
2013	45.5	50.2	52.2	34.4	45.3	58.4	70.3	78.7	59.5
2014	42.3	52.2	49.3	37.2	47.6	59.8	75.2	80.9	60.2
2015	45.2	52.1	46.9	34.8	46.6	62.0	74.8	76.8	63.9
2016	40.9	49.9	46.3	41.0	51.1	61.7	76.6	78.5	68.9
Avg	43.0	51.7	49.0	37.4	46.6	60.1	74.9	79.7	62.8

ADR (\$)									
	January	February	March	April	May	June	July	August	September
2010	135.05	152.90	113.56	94.52	106.41	123.27	179.55	173.14	138.17
2011	139.11	162.29	112.10	96.28	105.10	129.71	184.91	175.73	134.72
2012	138.77	154.45	114.73	101.69	110.31	135.59	188.91	178.87	142.95
2013	145.28	166.90	128.30	98.99	114.60	139.98	190.14	194.84	136.71
2014	151.28	170.89	127.75	99.12	121.66	141.11	198.31	199.74	140.44
2015	169.47	170.46	128.53	107.31	124.46	144.75	207.35	209.80	157.00
2016	158.28	175.98	129.44	116.40	127.26	147.22	220.58	212.74	157.67
Avg	148.28	164.81	121.96	102.22	116.02	137.38	195.68	192.12	143.95

RevPAR (\$)									
	January	February	March	April	May	June	July	August	September
2010	58.19	77.25	54.45	34.53	46.35	75.04	135.23	140.10	86.16
2011	58.14	90.47	56.36	37.78	47.25	75.33	142.00	140.25	85.55
2012	58.38	78.70	57.16	39.50	51.70	81.42	142.23	146.60	87.94
2013	66.10	83.81	66.97	34.03	51.91	81.73	133.76	153.38	81.30
2014	63.99	89.28	62.99	36.84	57.94	84.42	149.15	161.53	84.54
2015	76.54	88.74	60.33	37.38	58.01	89.76	155.14	161.19	100.37
2016	64.66	87.74	59.97	47.74	64.98	90.78	168.93	167.04	108.60
Avg	63.70	85.15	59.71	38.27	54.02	82.64	146.64	152.87	90.64

Supply									
	January	February	March	April	May	June	July	August	September
2010	64,263	58,044	64,263	61,590	64,263	62,190	64,263	64,263	62,190
2011	64,263	58,044	64,263	60,270	62,899	60,870	62,899	62,899	60,870
2012	62,899	56,812	62,961	60,330	62,930	60,900	62,930	62,930	59,940
2013	61,938	55,972	61,969	59,370	61,969	59,970	64,976	64,976	62,880
2014	63,581	57,428	63,581	60,930	63,581	61,530	63,581	63,581	61,530
2015	63,581	57,428	63,581	60,930	63,581	61,530	63,581	63,581	61,530
2016	63,581	57,428	63,581	60,930	63,581	61,590	63,643	63,550	61,500
Avg	63,444	57,308	63,457	60,621	63,258	61,226	63,696	63,683	61,491

Demand									
	January	February	March	April	May	June	July	August	September
2010	27,692	29,326	30,815	22,501	27,990	37,859	48,402	52,001	38,782
2011	26,857	32,359	32,310	23,650	28,281	35,351	48,303	50,200	38,653
2012	26,459	28,947	31,369	23,437	29,492	36,569	47,382	51,576	36,874
2013	28,180	28,106	32,349	20,412	28,068	35,013	45,710	51,151	37,395
2014	26,894	30,002	31,352	22,647	30,282	36,814	47,821	51,419	37,038
2015	28,716	29,895	29,845	21,224	29,634	38,156	47,570	48,850	39,335
2016	25,976	28,633	29,459	24,991	32,496	37,979	48,741	49,898	42,362
Avg	27,253	29,610	31,071	22,695	29,463	36,820	47,704	50,728	38,634

Revenue (\$)									
	January	February	March	April	May	June	July	August	September
2010	3,739,682	4,484,029	3,499,255	2,126,775	2,978,277	4,666,805	8,690,343	9,003,415	5,358,546
2011	3,736,118	5,251,485	3,621,951	2,277,099	2,972,195	4,585,488	8,931,670	8,821,561	5,207,201
2012	3,671,758	4,470,911	3,599,108	2,383,315	3,253,271	4,958,509	8,950,716	9,225,623	5,271,299
2013	4,094,075	4,691,018	4,150,331	2,020,593	3,216,585	4,901,287	8,691,405	9,966,288	5,112,372
2014	4,068,599	5,127,158	4,005,212	2,244,751	3,684,016	5,194,653	9,483,180	10,270,321	5,201,444
2015	4,866,435	5,095,919	3,836,079	2,277,532	3,688,347	5,523,106	9,863,876	10,248,932	6,175,479
2016	4,111,436	5,038,730	3,813,206	2,908,870	4,135,346	5,591,234	10,751,127	10,615,429	6,679,044
Avg	4,041,158	4,879,893	3,789,306	2,319,848	3,418,291	5,060,155	9,337,474	9,735,938	5,572,198

## Hershey Harrisburg Regional Visitors Bureau (HHRVB) – (DMO)

### Primary Mission

Official non-profit partnership-based Destination Marketing Organization (DMO) serving Dauphin and Perry Counties in Pennsylvania. Responsible for developing and executing comprehensive sales, marketing and communications programs to compete for leisure, business, group, and sporting event travel market segments among leading regional and national destinations. Accredited by Destination Marketing Association International.

### Occupancy Tax

County bed tax is 6%.

### Governance / Structure

Dauphin County Commissioners. A volunteer Board of Directors – comprised of veteran business leaders and local sales and marketing professionals – provide input and guidance.

### Funding

HHRVB receives funding from portions of the Dauphin County Hotel Tax and annual dues from approximately 300 Partners. Additional funding is contributed in partnership with state, county and municipal organizations.

### Budget (Fiscal '14-'15)

#### SOURCES OF REVENUE

Hotel Room Tax	\$ 2,127,568	76%
Partnership/Co-Op	\$ 187,181	7%
Grants	\$ 460,000	16%
Convention Services	\$ 9,810	0.5%
Misc.	\$ 5,095	0.5%
<b>Total Support and Revenue</b>	<b>\$ 2,789,654</b>	

#### EXPENSES

Marketing & Communications	\$ 1,199,547	43%
Sales & Event Services	\$ 808,997	29%
Partnership Development & Web	\$ 334,757	12%
Management & Operating	\$ 446,343	16%
<b>Total Expenses</b>	<b>\$ 2,789,644</b>	

### Staff

Thirteen full-time staff.

Source: Hershey-Annual Report 2015

## Dauphin County STR - % Rooms STAR Participants: 2015/2016 approximately 95%

Occupancy (%)									
	January	February	March	April	May	June	July	August	September
2010	36.9	50.3	49.2	58.3	57.8	70.6	77.9	80.9	56.4
2011	37.7	50.6	47.6	60.5	57.9	69.6	77.4	79.9	63.0
2012	40.9	52.2	52.9	58.7	60.2	73.3	72.5	79.9	57.9
2013	40.5	44.8	52.1	56.9	59.2	71.4	77.9	81.4	55.8
2014	40.9	51.6	55.0	62.9	62.3	71.8	78.4	81.4	58.3
2015	42.3	57.0	56.8	63.8	62.8	74.0	81.4	82.0	64.4
2016	40.2	54.6	53.9	65.4	63.3	76.6	79.6	81.2	67.2
<b>Avg</b>	<b>39.9</b>	<b>51.6</b>	<b>52.6</b>	<b>61.0</b>	<b>60.5</b>	<b>72.5</b>	<b>77.9</b>	<b>81.0</b>	<b>60.4</b>

ADR (\$)									
	January	February	March	April	May	June	July	August	September
2010	85.33	87.58	95.01	100.90	106.47	121.06	131.02	136.04	106.41
2011	90.60	90.95	96.13	104.31	111.54	124.46	136.24	139.39	103.48
2012	92.27	94.22	99.99	103.67	112.39	129.02	138.63	142.80	109.11
2013	93.17	97.84	101.30	106.42	115.45	132.73	149.01	151.55	111.52
2014	95.28	97.85	103.54	109.76	117.22	132.78	146.55	152.90	107.83
2015	95.45	101.46	105.86	111.22	121.04	138.09	152.87	157.87	118.80
2016	97.26	103.44	105.93	113.50	122.02	142.68	159.35	159.52	121.32
<b>Avg</b>	<b>92.98</b>	<b>96.46</b>	<b>101.40</b>	<b>107.37</b>	<b>115.41</b>	<b>131.84</b>	<b>145.11</b>	<b>148.58</b>	<b>111.21</b>

RevPAR (\$)									
	January	February	March	April	May	June	July	August	September
2010	31.46	44.09	46.74	58.85	61.57	85.48	102.06	110.03	60.05
2011	34.12	45.99	45.71	63.14	64.54	86.60	105.51	111.38	65.17
2012	37.75	49.18	52.91	60.81	67.64	94.58	100.50	114.12	63.14
2013	37.70	43.87	52.78	60.50	68.31	94.83	116.07	123.39	62.23
2014	38.98	50.51	56.96	68.99	72.99	95.38	114.86	124.49	62.82
2015	40.37	57.84	60.11	70.97	75.98	102.12	124.47	129.48	76.53
2016	39.14	56.45	57.14	74.26	77.20	109.34	126.89	129.59	81.58
<b>Avg</b>	<b>37.13</b>	<b>49.80</b>	<b>53.29</b>	<b>65.46</b>	<b>69.84</b>	<b>95.59</b>	<b>113.02</b>	<b>120.35</b>	<b>67.36</b>

Supply									
	January	February	March	April	May	June	July	August	September
2010	241,707	218,316	242,482	236,910	244,807	236,910	244,807	244,807	239,490
2011	244,342	220,696	247,473	239,490	247,473	239,490	247,442	247,442	237,000
2012	241,645	218,260	242,420	234,600	247,411	241,800	249,860	251,224	241,320
2013	248,589	224,532	249,364	245,850	254,045	245,850	254,045	256,246	247,920
2014	255,409	230,692	256,060	247,800	256,029	247,770	255,998	257,145	248,850
2015	256,370	230,692	256,184	247,920	256,184	247,920	250,790	251,193	243,090
2016	256,587	231,756	256,556	248,280	256,556	248,280	256,556	256,556	249,180
<b>Avg</b>	<b>249,236</b>	<b>224,992</b>	<b>250,077</b>	<b>242,979</b>	<b>251,786</b>	<b>244,003</b>	<b>251,357</b>	<b>252,088</b>	<b>243,836</b>

Demand									
	January	February	March	April	May	June	July	August	September
2010	89,126	109,895	119,299	138,167	141,557	167,284	190,688	198,005	135,139
2011	92,034	111,591	117,684	144,973	143,192	166,632	191,623	197,716	149,268
2012	98,855	113,922	128,290	137,613	148,897	177,260	181,140	200,759	139,659
2013	100,587	100,669	129,932	139,773	150,316	175,647	197,890	208,637	138,341
2014	104,497	119,086	140,855	155,745	159,424	177,977	200,644	209,358	144,986
2015	108,440	131,518	145,460	158,200	160,806	183,347	204,185	206,017	156,596
2016	103,252	126,466	138,404	162,448	162,316	190,263	204,295	208,421	167,555
<b>Avg</b>	<b>99,542</b>	<b>116,164</b>	<b>131,418</b>	<b>148,131</b>	<b>152,358</b>	<b>176,916</b>	<b>195,781</b>	<b>204,130</b>	<b>147,363</b>

Revenue (\$)									
	January	February	March	April	May	June	July	August	September
2010	7,604,676	9,624,782	11,334,411	13,940,982	15,071,844	20,251,286	24,984,430	26,937,275	14,380,778
2011	8,338,141	10,149,081	11,312,780	15,122,222	15,971,327	20,739,280	26,107,322	27,558,884	15,446,210
2012	9,121,605	10,734,189	12,827,629	14,266,113	16,733,864	22,870,187	25,111,737	28,668,580	15,237,628
2013	9,372,036	9,849,250	13,161,632	14,875,061	17,353,974	23,313,550	29,487,533	31,618,096	15,427,572
2014	9,956,851	11,652,436	14,584,494	17,094,504	18,688,319	23,631,713	29,404,024	32,011,521	15,633,736
2015	10,350,112	13,344,070	15,398,224	17,594,854	19,463,925	25,317,910	31,214,652	32,524,268	18,602,956
2016	10,042,286	13,081,941	14,660,537	18,438,319	19,805,719	27,147,537	32,554,214	33,246,787	20,327,447
<b>Avg</b>	<b>9,255,101</b>	<b>11,205,107</b>	<b>13,325,672</b>	<b>15,904,579</b>	<b>17,584,139</b>	<b>23,324,495</b>	<b>28,409,130</b>	<b>30,366,487</b>	<b>16,436,618</b>

## The Albany County Convention & Visitors Bureau, Inc. (ACCVB)

### Primary Mission

The Albany CVB (ACCVB) was incorporated in 1976 to promote Albany as a destination for visitors and convention delegates. ACCVB assists meeting specialists by acting as a community concierge to attract and assure successful meetings, conventions, and events.

The ACCVB is an independent, not-for-profit corporation and serves as Albany County's Official Tourism Promotion Agency (TPA), as well as an administrator of the Capital-Saratoga Region and Hudson River Valley marketing efforts. Through its forty year history, ACCVB has also served as the DMO (Destination Marketing Organization), and in its most recent iteration as DMO (Destination Management Organization).

### Occupancy Tax

County bed tax is 6%.

### Governance / Structure

The ACCVB staff works with its Board of Directors, members, volunteers, and other hospitality organizations to contribute to the region's ever-expanding hospitality industry.

### Budget (2016)

	2016 Budget	2015 (unaudited)
Earned Income	\$ 100,900	\$ 94,522
Fee for Services	\$ 1,659,668	\$ 1,743,454
Grants	\$ 110,000	\$ 108,806
Investments and Interest Income	\$ 33,200	\$ 751
Other Income	\$ 375	\$ -1,665
<b>Total Income</b>	<b>\$ 1,904,143</b>	<b>\$ 1,945,868</b>

### Sponsorships/Allocations

ACCVB formed the Community Foundation for the Greater Capital Region (CFGCR), a 501(c)(3) corporation in 1993, to support grants which help build and support Albany County tourism attractions, events and other travel and tourism related activities.

In 2015, the Foundation funded Hospitality Grants for the third year. These grants encourage collaboration between organizations, community groups and hospitality businesses to further extend the economic impact of the program.

The fund is managed by CFGCR and is funded by the earned income of the ACCVB.

### Staff

Six sales and service meeting and event staff. Three marketing and PR staff.

Source: <http://www.albany.org> and 2015 Annual Report

## Albany/Schenectady STR - % Rooms STAR Participants: 2015/2016 approximately 84%

Occupancy (%)						
	January	February	March	April	May	June
2010	41.4	48.9	51.6	51.1	57.7	62.4
2011	41.2	50.4	53.9	53.8	59.4	64.9
2012	48.1	55.4	58.1	57.6	62.3	68.4
2013	44.3	53.5	54.9	59.4	62.4	67.5
2014	45.3	56.0	59.5	62.4	68.9	73.7
2015	48.5	57.9	65.1	64.9	68.1	74.4
2016	43.9	53.2	57.1	59.8	66.9	
Avg	44.7	53.6	57.2	58.4	63.7	68.6

ADR (\$)						
	January	February	March	April	May	June
2010	88.14	91.90	92.40	90.96	98.62	99.76
2011	90.47	94.57	94.29	94.22	100.17	99.91
2012	95.70	98.58	98.13	100.06	106.68	107.13
2013	97.56	101.83	99.44	101.79	107.42	106.63
2014	99.18	104.23	102.59	102.03	111.13	111.17
2015	100.07	106.48	108.30	108.96	116.68	116.85
2016	104.07	109.96	109.33	108.50	118.00	
Avg	96.67	101.36	101.03	101.39	108.86	107.28

RevPAR (\$)						
	January	February	March	April	May	June
2010	36.52	44.94	47.67	46.50	56.91	62.29
2011	37.31	47.66	50.83	50.69	59.53	64.88
2012	46.02	54.57	56.99	57.60	66.48	73.27
2013	43.25	54.45	54.63	60.46	67.08	71.95
2014	44.92	58.41	61.01	63.63	76.55	81.88
2015	48.52	61.62	70.51	70.67	79.43	86.95
2016	45.72	58.54	62.41	64.86	78.89	
Avg	43.19	54.33	57.76	59.22	69.33	73.54

Supply						
	January	February	March	April	May	June
2010	360,685	325,752	359,910	351,060	364,095	352,350
2011	356,531	322,028	357,120	348,360	360,685	349,050
2012	357,957	323,316	358,546	349,680	362,669	350,970
2013	357,771	323,148	358,329	348,360	361,274	350,340
2014	355,260	317,100	351,664	341,910	359,600	348,000
2015	358,360	323,652	363,537	349,650	362,638	353,790
2016	375,131	338,828	373,457	365,190	382,230	
Avg	360,242	324,832	360,366	350,601	364,742	350,750

Demand						
	January	February	March	April	May	June
2010	149,437	159,309	185,655	179,480	210,116	219,997
2011	147,030	162,314	192,516	187,424	214,343	226,668
2012	172,117	178,960	208,241	201,287	226,021	240,019
2013	158,630	172,781	196,840	206,927	225,609	236,397
2014	160,902	177,697	209,126	213,236	247,716	256,310
2015	173,740	187,284	236,680	226,789	246,864	263,263
2016	164,789	180,384	213,197	218,314	255,535	
Avg	160,949	174,104	206,036	204,780	232,315	240,442

Revenue (\$)						
	January	February	March	April	May	June
2010	13,170,785	14,640,613	17,155,349	16,325,350	20,721,105	21,946,279
2011	13,302,143	15,349,430	18,153,006	17,659,680	21,469,847	22,646,371
2012	16,471,480	17,642,690	20,434,927	20,139,954	24,111,281	25,714,027
2013	15,475,157	17,594,499	19,574,069	21,062,471	24,234,032	25,207,383
2014	15,958,265	18,521,225	21,454,814	21,756,226	27,527,998	28,493,691
2015	17,386,693	19,942,788	25,631,430	24,710,733	28,804,231	30,761,235
2016	17,149,140	19,834,908	23,307,876	23,686,437	30,153,189	
Avg	15,559,095	17,646,593	20,815,924	20,762,979	25,288,812	25,794,831

Upstate New York STR - % Rooms STAR Participants: 2015/2016 approximately 57%  
 (Clinton, Essex, Franklin, Fulton, Hamilton, Herkimer, Jefferson, Lewis, Oneida, St. Lawrence, Warren,  
 and Washington Counties)

Occupancy (%)						
	January	February	March	April	May	June
2010	39.6	44.4	44.2	42.0	48.7	62.7
2011	38.4	47.0	46.3	46.0	50.7	61.1
2012	38.7	46.0	49.1	46.7	52.5	64.1
2013	40.4	43.3	45.4	41.9	49.1	58.6
2014	36.8	43.2	43.1	45.5	51.4	59.7
2015	37.2	42.5	42.0	42.8	52.1	65.2
2016	35.5	41.7	41.2	45.5	52.2	
Avg	38.0	44.0	44.4	44.4	50.9	61.9

ADR (\$)						
	January	February	March	April	May	June
2010	92.68	101.86	87.71	81.77	93.86	104.58
2011	96.37	104.47	88.91	84.22	93.50	110.21
2012	96.16	104.39	94.08	90.30	97.44	113.75
2013	98.67	109.83	100.36	90.81	100.50	114.76
2014	101.15	112.00	98.34	91.17	103.32	115.02
2015	108.76	114.48	99.88	96.12	107.55	117.99
2016	106.17	115.01	99.54	97.61	108.98	
Avg	100.03	108.89	95.59	90.46	100.92	112.80

RevPAR (\$)						
	January	February	March	April	May	June
2010	36.74	45.25	38.76	34.36	45.69	65.61
2011	36.97	49.13	41.18	38.74	47.40	67.39
2012	37.18	48.00	46.22	42.19	51.17	72.86
2013	39.91	47.54	45.60	38.09	49.34	67.23
2014	37.22	48.35	42.41	41.49	53.06	68.69
2015	40.42	48.60	41.92	41.17	55.99	76.95
2016	37.70	48.01	41.03	44.39	56.86	
Avg	38.04	47.86	42.44	40.13	51.42	69.83

Supply						
	January	February	March	April	May	June
2010	402,287	366,156	403,837	416,790	528,767	516,570
2011	403,434	365,904	405,108	419,760	530,317	517,890
2012	406,317	368,508	408,053	426,300	536,052	525,180
2013	418,500	382,004	422,933	435,210	548,049	537,930
2014	436,666	395,920	438,340	441,180	546,964	536,880
2015	440,696	399,560	440,851	448,860	552,048	541,800
2016	444,602	403,088	449,004	450,540	552,544	
Avg	421,786	383,020	424,018	434,091	542,106	529,375

Demand						
	January	February	March	April	May	June
2010	159,450	162,659	178,490	175,136	257,377	324,093
2011	154,759	172,087	187,623	193,089	268,817	316,681
2012	157,088	169,457	200,463	199,155	281,517	336,426
2013	169,269	165,351	192,165	182,535	269,037	315,112
2014	160,668	170,937	189,038	200,791	280,915	320,620
2015	163,778	169,623	185,040	192,263	287,417	353,326
2016	157,887	168,271	185,057	204,863	288,299	
Avg	160,414	168,341	188,268	192,547	276,197	327,710

Revenue (\$)						
	January	February	March	April	May	June
2010	14,778,538	16,568,220	15,654,683	14,320,592	24,157,939	33,892,532
2011	14,913,758	17,978,487	16,681,836	16,261,214	25,135,364	34,899,898
2012	15,105,491	17,690,131	18,859,746	17,983,685	27,431,637	38,266,930
2013	16,702,066	18,160,029	19,285,792	16,575,796	27,039,222	36,163,407
2014	16,251,821	19,144,118	18,589,109	18,305,512	29,024,570	36,878,302
2015	17,812,539	19,418,804	18,482,318	18,481,062	30,911,876	41,690,320
2016	16,763,310	19,352,978	18,421,134	19,997,637	31,418,435	
Avg	16,046,789	18,330,395	17,996,374	17,417,928	27,874,149	36,965,232

Elmira/Ithaca STR - % Rooms STAR Participants: 2015/2016 approximately 74.9%

<b>Occupancy (%)</b>					
	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>
<b>2010</b>	38.7	45.9	48.3	56.7	60.5
<b>2011</b>	37.9	45.9	49.7	59.0	65.7
<b>2012</b>	44.4	51.8	50.6	55.8	61.2
<b>2013</b>	33.3	40.0	42.1	49.1	52.4
<b>2014</b>	33.5	42.1	42.6	52.3	58.5
<b>2015</b>	33.2	39.5	41.3	50.4	57.1
<b>2016</b>	31.5	40.6	42.8	51.2	57.2
<b>Avg</b>	36.0	43.6	45.2	53.4	58.9

<b>ADR (\$)</b>					
	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>
<b>2010</b>	81.12	86.59	85.95	92.69	105.84
<b>2011</b>	89.37	94.60	96.90	102.98	111.67
<b>2012</b>	96.16	100.05	101.26	107.02	115.95
<b>2013</b>	97.93	101.91	104.73	112.20	124.17
<b>2014</b>	97.08	102.64	106.79	110.29	128.15
<b>2015</b>	97.36	107.04	107.97	115.54	132.92
<b>2016</b>	98.03	107.87	107.52	117.97	131.09
<b>Avg</b>	93.69	99.92	101.34	108.22	121.30

<b>RevPAR (\$)</b>					
	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>
<b>2010</b>	31.39	39.74	41.49	52.60	64.07
<b>2011</b>	33.89	43.44	48.18	60.81	73.42
<b>2012</b>	42.73	51.79	51.23	59.75	70.93
<b>2013</b>	32.60	40.80	44.04	55.06	65.07
<b>2014</b>	32.54	43.19	45.47	57.66	74.94
<b>2015</b>	32.30	42.25	44.59	58.20	75.94
<b>2016</b>	30.88	43.81	46.03	60.37	74.99
<b>Avg</b>	33.73	43.57	45.85	57.80	71.40

<b>Supply</b>					
	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>
<b>2010</b>	149,637	133,784	148,118	146,670	153,357
<b>2011</b>	148,118	133,784	148,118	146,670	153,357
<b>2012</b>	151,125	136,500	151,249	149,700	156,488
<b>2013</b>	154,628	139,692	154,659	155,370	162,347
<b>2014</b>	155,279	140,252	155,279	156,540	163,556
<b>2015</b>	158,348	143,024	158,348	156,570	163,587
<b>2016</b>	158,999	143,612	158,999	160,140	167,276
<b>Avg</b>	153,733	138,664	153,539	153,094	159,995

<b>Demand</b>					
	<b>January</b>	<b>February</b>	<b>March</b>	<b>April</b>	<b>May</b>
<b>2010</b>	57,913	61,398	71,491	83,233	92,840
<b>2011</b>	56,174	61,434	73,641	86,606	100,823
<b>2012</b>	67,150	70,657	76,519	83,577	95,725
<b>2013</b>	51,477	55,923	65,038	76,249	85,074
<b>2014</b>	52,045	59,015	66,122	81,839	95,646
<b>2015</b>	52,532	56,458	65,398	78,875	93,461
<b>2016</b>	50,084	58,328	68,067	81,945	95,693
<b>Avg</b>	55,339	60,459	69,468	81,761	94,180

## Warren County STR – % Rooms STAR Participants: Jan. - Sept. 2016 approximately 49%

Occupancy (%)									
	January	February	March	April	May	June	July	August	September
2009	30.0	38.1	34.5	34.7	43.9	55.7	65.9	78.0	56.6
2010	29.2	38.3	33.7	32.4	43.1	60.0	75.5	83.1	59.4
2011	32.9	41.9	36.0	39.1	45.2	59.9	75.3	81.1	58.1
2012	32.3	40.3	39.4	38.5	45.4	61.7	74.4	82.8	55.1
2013	32.9	38.0	40.0	34.7	44.0	56.5	73.4	82.9	52.7
2014	28.1	36.3	34.1	39.0	47.1	58.0	75.7	85.1	53.6
2015	32.2	39.4	35.9	38.7	48.0	61.9	74.2	79.2	58.0
2016	30.5	36.3	33.0	39.6	47.8	61.0	74.9	77.6	59.9
<b>Avg</b>	<b>31.0</b>	<b>38.6</b>	<b>35.8</b>	<b>37.1</b>	<b>45.6</b>	<b>59.3</b>	<b>73.7</b>	<b>81.2</b>	<b>56.7</b>

ADR (\$)									
	January	February	March	April	May	June	July	August	September
2009	102.56	110.97	97.15	96.75	102.12	119.69	146.31	155.87	121.29
2010	98.93	111.23	91.94	83.09	102.08	120.64	152.99	160.21	124.30
2011	102.70	107.22	93.21	85.42	103.30	128.14	159.27	165.80	126.29
2012	104.48	118.46	108.47	102.63	109.00	135.02	164.35	174.25	129.80
2013	106.97	122.56	117.13	103.31	113.18	137.28	173.32	183.73	127.52
2014	110.78	126.76	112.42	104.88	116.34	136.32	180.79	192.43	128.53
2015	117.01	129.78	114.24	112.34	121.12	139.52	182.33	195.52	138.24
2016	112.04	126.96	110.88	108.19	122.42	145.43	196.23	198.16	147.34
<b>Avg</b>	<b>106.79</b>	<b>118.91</b>	<b>105.83</b>	<b>99.87</b>	<b>111.37</b>	<b>132.85</b>	<b>169.68</b>	<b>178.25</b>	<b>130.41</b>

RevPAR (\$)									
	January	February	March	April	May	June	July	August	September
2009	30.77	42.28	33.52	33.54	44.86	66.66	96.34	121.55	68.68
2010	28.87	42.60	31.01	26.92	44.04	72.39	115.51	133.10	73.79
2011	33.76	44.91	33.58	33.41	46.71	76.73	119.90	134.50	73.35
2012	33.73	47.72	42.76	39.56	49.44	83.37	122.24	144.32	71.51
2013	35.21	46.53	46.81	35.90	49.78	77.58	127.14	152.35	67.20
2014	31.16	46.00	38.32	40.87	54.80	79.02	136.91	163.80	68.86
2015	37.73	51.17	41.04	43.43	58.18	86.41	135.36	154.94	80.23
2016	34.19	46.12	36.55	42.88	58.55	88.73	147.02	153.74	88.30
<b>Avg</b>	<b>33.09</b>	<b>45.87</b>	<b>37.91</b>	<b>37.03</b>	<b>50.74</b>	<b>78.83</b>	<b>124.98</b>	<b>144.79</b>	<b>73.99</b>

Supply									
	January	February	March	April	May	June	July	August	September
2009	120,311	99,316	109,957	121,920	202,337	198,780	206,398	206,398	197,940
2010	117,025	108,500	118,575	127,350	204,414	200,490	207,173	207,235	198,750
2011	110,484	101,304	112,158	124,140	200,787	200,250	206,863	206,708	198,240
2012	110,081	100,940	111,755	123,780	200,632	200,100	206,770	206,770	198,360
2013	110,081	103,404	114,483	123,840	200,570	200,040	206,708	206,708	198,240
2014	110,050	100,912	111,724	123,750	200,601	200,070	206,739	206,739	198,270
2015	105,152	96,488	106,826	123,750	197,749	197,310	203,887	202,647	194,310
2016	108,314	99,344	112,716	123,750	196,509	196,260	202,802	206,491	198,030
<b>Avg</b>	<b>111,437</b>	<b>101,276</b>	<b>112,274</b>	<b>124,035</b>	<b>200,450</b>	<b>199,163</b>	<b>205,918</b>	<b>206,212</b>	<b>197,768</b>

Demand									
	January	February	March	April	May	June	July	August	September
2009	36,097	37,843	37,941	42,263	88,892	110,711	135,914	160,943	112,082
2010	34,145	41,559	39,995	41,261	88,199	120,298	156,417	172,167	117,985
2011	36,316	42,434	40,405	48,548	90,798	119,904	155,725	167,681	115,141
2012	35,538	40,664	44,055	47,712	90,999	123,552	153,784	171,255	109,276
2013	36,235	39,259	45,753	43,032	88,214	113,054	151,623	171,402	104,463
2014	30,951	36,621	38,084	48,229	94,495	115,981	156,557	175,983	106,226
2015	33,907	38,045	38,378	47,834	94,987	122,204	151,372	160,587	112,766
2016	33,058	36,090	37,158	49,046	93,988	119,745	151,949	160,209	118,685
<b>Avg</b>	<b>34,531</b>	<b>39,064</b>	<b>40,221</b>	<b>45,991</b>	<b>91,322</b>	<b>118,181</b>	<b>151,663</b>	<b>167,528</b>	<b>112,078</b>

Revenue (\$)									
	January	February	March	April	May	June	July	August	September
2009	3,702,268	4,199,571	3,685,844	4,089,092	9,077,760	13,251,527	19,885,370	25,086,728	13,594,362
2010	3,378,096	4,622,612	3,677,069	3,428,383	9,003,228	14,513,137	23,930,956	27,583,059	14,665,205
2011	3,729,618	4,549,900	3,766,285	4,146,959	9,379,296	15,365,047	24,803,093	27,802,307	14,540,684
2012	3,713,164	4,817,181	4,778,474	4,896,695	9,918,927	16,682,527	25,274,678	29,841,281	14,184,395
2013	3,876,215	4,811,559	5,359,010	4,445,491	9,984,093	15,519,552	26,279,904	31,491,801	13,321,486
2014	3,428,904	4,641,957	4,281,390	5,058,131	10,993,101	15,810,210	28,304,712	33,864,494	13,653,596
2015	3,967,403	4,937,568	4,384,451	5,373,894	11,504,461	17,049,514	27,598,923	31,397,473	15,588,913
2016	3,703,745	4,581,892	4,120,112	5,306,049	11,506,163	17,414,650	29,816,277	31,746,602	17,486,793
<b>Avg</b>	<b>3,687,427</b>	<b>4,645,280</b>	<b>4,256,579</b>	<b>4,593,087</b>	<b>10,170,879</b>	<b>15,700,771</b>	<b>25,734,683</b>	<b>29,851,718</b>	<b>14,629,429</b>

## Peer Set Comparison Chart: 2010 - 2015

Occupancy (%)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	51.9	58.4	61.1	53.4	56.8	55.7	56.8	55.1	59.5
2011	52.8	63.9	65.2	54.7	59.2	60.3	57.6	55.6	62.8
2012	52.5	65.3	66.5	54.4	58.5	60.4	58.4	55.8	56.8
2013	50.9	65.4	66	53.2	58.0	60.8	58.3	53.7	52.8
2014	51.6	69.8	69.2	54.1	59.9	65	58.4	54	54.8
2015	52.8	68.7	69.9	53.7	62.4	64.4	56.9	53.6	53.1

ADR (Average Daily Rate) (\$)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	124.83	123.93	136.83	139.63	111	98.1	89.3	107.33	99.59
2011	128.15	124.33	136.82	141.41	112.20	100.57	90.81	109.59	106.13
2012	135.01	132.38	144.15	144.53	115.31	106.09	92.97	112.41	111.75
2013	139.84	137.78	151.93	150.32	119.93	107.77	96.67	114.85	114.33
2014	143.82	142.32	157.66	154.05	120.04	111.8	98.48	118	117.86
2015	146.21	146.54	160.7	161.21	128.81	115.97	100.74	121.24	121.57

RevPAR (Revenue Per Available Room) (\$)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	64.81	72.39	83.56	74.54	62.79	54.64	50.9	59.11	59.3
2011	67.63	79.48	89.27	77.39	66.43	60.68	52.29	60.99	66.6
2012	70.88	86.49	96.5	78.56	67.48	64.12	54.3	62.68	63.51
2013	71.19	90.04	100.34	80.03	69.50	65.58	56.38	61.7	60.36
2014	74.24	99.3	109.11	83.34	71.93	72.7	57.55	63.74	64.56
2015	77.17	100.66	112.4	86.56	77.29	74.67	57.28	64.94	64.52

Hotel Rooms in Region	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2014		2,663	1,594	2,048	8,269	11,514	8,119	16,038	5,182
2015		2,900	1,740	2,048	8,334	11,831	8,125	16,163	5,239

Supply (Rooms available)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	1,846,966	904,271	578,750	755,445	2,883,897	4,261,213	2,817,806	5,552,497	1,781,946
2011	1,816,888	907,464	578,750	743,345	2,891,993	4,229,754	2,882,508	5,571,152	1,793,610
2012	1,817,997	941,650	578,750	735,848	2,907,813	4,245,872	2,911,565	5,669,698	1,837,112
2013	1,831,871	933,124	570,404	746,252	2,985,954	4,252,275	2,947,634	5,808,724	1,880,874
2014	1,858,985	972,324	582,164	747,415	3,018,118	4,203,244	2,963,340	5,858,651	1,891,906
2015	1,834,395	1,058,954	635,358	747,415	3,001,858	4,318,950	2,965,776	5,903,977	1,912,658

Demand (Rooms Sold)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	958,972	528,215	353,433	403,308	1,637,244	2,373,384	1,600,295	3,057,847	1,061,143
2011	958,905	580,143	377,628	406,806	1,712,108	2,552,093	1,659,938	3,100,346	1,125,585
2012	954,492	615,199	384,794	399,962	1,701,725	2,566,199	1,700,634	3,161,154	1,044,029
2013	932,567	609,841	376,711	397,289	1,730,411	2,583,755	1,719,112	3,120,655	992,892
2014	959,667	678,419	402,902	404,369	1,808,496	2,733,362	1,731,870	3,164,521	1,036,312
2015	968,197	727,383	444,194	401,298	1,873,952	2,780,695	1,686,275	3,162,361	1,015,023

Revenue (\$)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	119,707,318	65,462,556	48,360,637	56,312,884	181,075,886	232,832,107	143,434,179	328,192,570	105,674,850
2011	122,883,029	72,127,563	51,666,332	57,525,991	192,102,889	256,667,981	150,730,733	339,778,930	119,454,296
2012	128,867,566	81,442,872	55,851,921	57,804,720	196,229,539	272,258,392	158,108,362	355,350,679	116,673,114
2013	130,410,139	84,022,195	57,232,122	59,721,673	207,519,908	278,445,520	166,182,772	358,414,105	113,521,285
2014	138,014,688	96,500,000	63,521,373	62,293,191	217,092,908	305,588,338	170,547,148	373,414,105	122,139,222
2015	141,557,744	106,500,555	71,416,464	64,693,597	232,009,733	322,477,527	169,871,980	383,414,105	123,400,151

Sample % (% Rooms STAR Participants)	Warren Cnty	Saratoga Cnty	Saratoga Springs	Essex County	Dauphin County	Albany/Shenectady	Syracuse	Upstate NY Area	NY West Area
2010	43.5	75.1	75.1	58.1	91.1	83.7	86.8	51.3	74.1
2011	43.0	75.3	75.1	59.1	92	84.6	88.1	51.4	74.5
2012	45.8	73.9	75.1	59.7	93.8	81.6	87.2	53.4	75.2
2013	49.0	74.5	76.1	64.3	95	82	88.2	55.9	75.4
2014	51.2	74.3	74.6	67.9	95	83.3	88.9	56.3	74.4
2015	51.1	77.2	75	67.9	94.9	83.9	89.1	55.9	74.8

## Smith Travel Research Data

Warren County Tourism purchased Warren County, New York and peer set data from Smith Travel Research (STR) in the form of a six-year trend reports for all hotel/motel properties. The STR data reflects primarily chain-affiliated hotel/motels with a monthly response rate ranging from 57% – 95% participation. All tables and charts shown on the previous pages have been created from the data provided in the STR Six-Year Trend Analysis Annual Occupancy Data for Warren County and its peer set.

Warren County's lodging occupancy kept pace or outperformed the national average in July and August of 2016. According to STR, the U.S. hotel industry's occupancy rate for July 2016 was 74.4%; Warren County's was 74.7%. Likewise, the U.S. hotel industry's occupancy rate for August 2016 was 70.2%; Warren County's was 77.6%.

Like many of its peers, Warren County saw a slight dip in occupancy in 2013, mostly likely due to the hurricane, as well as a dip in sales tax. A slight increase in room supply, in conjunction with a slight decrease in demand over the two-year period 2012 to 2013, also helps explain the declining occupancy rate during that time period.

However, ADR and RevPAR have continued to increase 2010 through 2015. Warren County STR reports also show an overall positive trend in all lodging metrics for both Year-to-Date and Running 12 Months for the period April, 2015 - September, 2016; Running 12 Months Occupancy +0%, Demand +1.1%, ADR +2.7%, RevPAR +2.7%, and Revenue +3.8%; Year-to-Date Occupancy -.09%, Demand +0.2%, ADR +3.1%, RevPAR +2.2%, and Revenue +3.3%. These positive results are in spite of a non-existent winter, the restructuring of the tourism department, the tourism staff rebuilding community connections through many stakeholder queries and meetings, and the tourism department being down two staff members.

Many of Warren County's smaller properties are not represented in the STR reports. Some, due to the county exemption for small properties that do not provide housekeeping services or which have too few units, do not collect occupancy tax. However, these properties play a crucial role in the character of Warren County, and the unplugged, authentic getaway experience many people look for. Their vitality is important to, and partially indicative of, the overall health of the lodging industry in Warren County.

## Competitive Analysis: Recommendations and Important Takeaways for Warren County

Over-development presents real challenges to Warren County. Saratoga statistics serve as a wake-up call. Between the significant increase in lodging rooms within the Saratoga market, and the lack of additional funding to drive demand, Occupancy, ADR, RevPAR, and Demand have all dropped considerably for 2016 compared to the upward trend of the previous years. (See STR charts on pages 6.4 and 6.5)

In Warren County's case, there are now 91,000 new room nights on the Warren County market just with the opening of the three new hotels at Exit 18. If Warren County does not want to see a drop in Occupancy, ADR, and RevPAR, it is imperative that the county:

- focuses marketing strategy on increasing occupancy by increasing
  - ◇ visitation from core and niche markets, and
  - ◇ extending the tourist season, and
- carefully selects the type of new lodging that is built, preferably higher end, year-round accommodations offering full amenities.

Custom STR reports can provide insight into what is happening across different levels of branded properties. These differences are important to note as, illustrated by the charts on the following pages, budget properties are not faring as well as upper scale lodgings. We recommend the tourism department utilize additional reporting from STR, such as Custom Forecasts and Historic Trends, which will help chart opportunities, inform strategy, and drive flexible, quick-turnaround marketing tactics.

Also important to remember is that, unlike some of its peers and competitors, many of Warren County's lodgings do **not** participate in the STR reports because of their size. However, taken together, these smaller and cabin properties represent a good portion of the available lodging in the county, and initiatives taken to drive lodging demand must take their unique challenges and opportunities into account as well.

### Custom Forecasts and Historic Trend sample reports

See following pages 6.20 - 6.22.

Custom Forecast - Sample Report

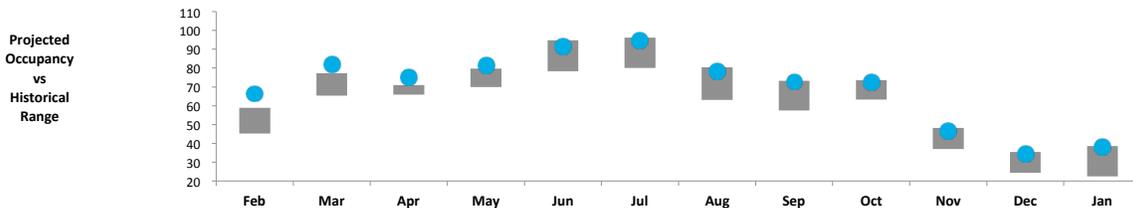


Overview - SAMPLE  
Feb 2016

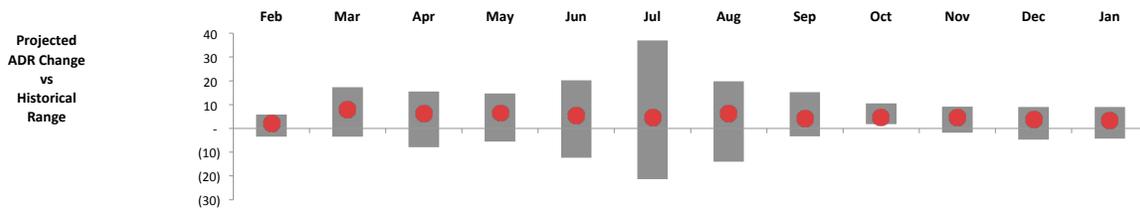
Annual Performance	Year	Occupancy			ADR			RevPAR		
		%	% Change	▲	\$	% Change	▲	\$	% Change	▲
Actual	2011	61.9		▲	136.75		▲	84.63		▲
	2012	63.7	3.0	▲	146.59	7.2	▲	93.43	10.4	▲
	2013	65.4	2.6	▲	152.13	3.8	▲	99.51	6.5	▲
	2014	66.5	1.7	▲	158.26	4.0	▲	105.29	5.8	▲
	2015	67.7	1.7	▲	168.28	6.3	▲	113.89	8.2	▲
Forecast	2016	69.5	2.7	▲	175.97	4.6	▲	122.33	7.4	▲
	2017									

Pipeline	
Projects	Rooms
4	368
0	0

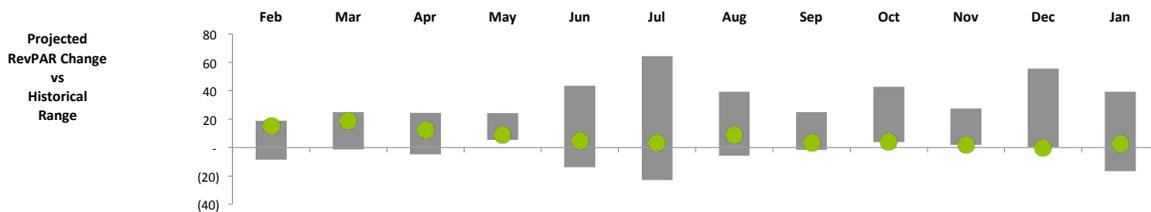
Next 12 Months	2016											2017
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Occupancy	66.5	81.8	75.0	81.7	91.6	94.5	78.4	72.7	72.6	46.8	34.2	38.3
Occupancy Percent Change	12.8	10.1	5.6	2.5	-0.4	-0.9	2.4	-0.8	-0.3	-2.8	-3.5	-0.7



	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
ADR	99.52	161.80	171.53	208.43	245.32	274.11	188.88	159.26	140.00	108.58	97.14	88.09
ADR Percent Change	2.3	7.9	6.4	6.5	5.5	4.5	6.3	4.0	4.4	4.7	3.8	3.2



	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
RevPAR	66.16	132.43	128.68	170.28	224.68	259.09	148.01	115.75	101.59	50.78	33.19	33.70
RevPAR Percent Change	15.3	18.8	12.4	9.2	5.1	3.5	8.8	3.1	4.1	1.7	0.1	2.5

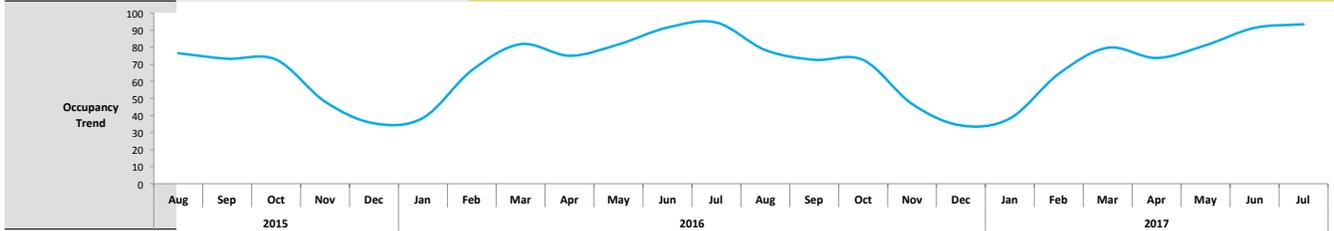


Custom Monthly Forecast - Sample Report



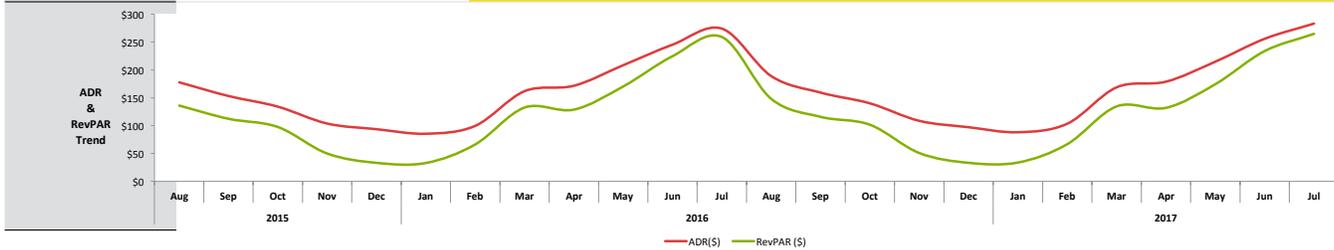
Monthly Forecast - SAMPLE  
Feb 2016

Occupancy (%)	2015					2016												2017						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Occupancy	76.5	73.3	72.8	48.1	35.4	38.5	66.5	81.8	75.0	81.7	91.6	94.5	78.4	72.7	72.6	46.8	34.2	38.3	64.5	79.7	73.7	81.2	91.4	93.5
Occupancy Percent Change	-3.7	6.7	-1.2	4.4	2.1	12.2	12.8	10.1	5.6	2.5	-0.4	-0.9	2.4	-0.8	-0.3	-2.8	-3.5	-0.7	-3.0	-2.6	-1.7	-0.6	-0.2	-1.1



ADR(\$)	2015					2016												2017						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
ADR	177.73	153.19	134.06	103.73	93.61	85.40	99.52	161.80	171.53	208.43	245.32	274.11	188.88	159.26	140.00	108.58	97.14	88.09	103.41	168.76	178.91	214.78	255.86	283.15
ADR Percent Change	1.9	15.3	7.7	2.4	3.8	-2.4	2.3	7.9	6.4	6.5	5.5	4.5	6.3	4.0	4.4	4.7	3.8	3.2	3.9	4.3	4.3	3.0	4.3	3.3

RevPAR (\$)	2015					2016												2017						
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
RevPAR	135.99	112.27	97.56	49.92	33.15	32.89	66.16	132.43	128.68	170.28	224.68	259.09	148.01	115.75	101.59	50.78	33.19	33.70	66.71	134.56	131.87	174.34	233.84	264.76
RevPAR Percent Change	-1.9	23.0	6.4	7.0	5.9	9.5	15.3	18.8	12.4	9.2	5.1	3.5	8.8	3.1	4.1	1.7	0.1	2.5	0.8	1.6	2.5	2.4	4.1	2.2



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Custom Historic Trends - Sample Report



Historical Trend with Projections - SAMPLE  
Feb 2016

Occupancy (%)	2010		2011		2012		2013		2014		2015		2016		2017		Total Year								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	22.4	45.3	65.4	68.7	69.9	78.4	80.2	63.0	63.1	65.2	39.0	26.4	57.3												
	29.3	50.5	72.6	65.9	70.7	93.7	96.3	73.4	57.6	63.3	37.0	24.3	61.9												
	27.4	55.1	77.4	71.0	76.7	92.2	94.6	69.8	66.7	66.2	42.3	25.1	63.7												
	28.2	53.0	75.2	66.6	79.7	94.7	94.7	80.5	70.2	66.3	43.9	31.3	65.4												
	29.4	52.4	76.8	68.2	79.1	93.1	95.8	79.4	68.7	73.7	46.1	34.7	66.5												
	34.3	58.9	74.4	71.0	79.7	92.0	95.4	76.5	73.3	72.8	48.1	35.4	67.7												
	38.5	66.5	81.8	75.0	81.7	91.6	94.5	78.4	72.7	72.6	46.8	34.2	69.5												
	38.3	64.5	79.7	73.7	81.2	91.4	93.5																		

ADR (\$)	2010		2011		2012		2013		2014		2015		2016		2017		Total Year								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	74.48	80.39	113.36	123.42	130.25	141.79	142.84	118.02	111.89	104.07	88.44	81.05	116.26												
	79.34	85.10	117.20	124.17	148.66	170.42	195.76	141.37	120.78	114.98	96.59	88.33	136.75												
	86.52	89.77	137.43	143.37	170.40	190.40	207.81	154.89	126.11	117.04	97.41	90.57	146.59												
	85.15	93.62	147.45	145.54	173.54	204.64	216.87	161.51	130.92	121.30	95.69	86.29	152.13												
	82.97	92.17	146.96	149.48	186.79	211.67	236.64	174.48	132.86	124.52	101.26	90.22	158.26												
	87.49	97.33	149.98	161.26	195.68	232.53	262.42	177.73	153.19	134.06	103.73	93.61	168.28												
	85.40	99.52	161.80	171.53	208.43	245.32	274.11	188.88	159.26	140.00	108.58	97.14	175.97												
	88.09	103.41	168.76	178.91	214.78	255.86	283.15																		

RevPAR (\$)	2010		2011		2012		2013		2014		2015		2016		2017		Total Year								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	16.69	36.41	74.13	84.83	91.06	111.18	114.49	74.40	70.59	67.90	34.46	21.41	66.61												
	23.28	42.95	85.12	81.83	105.18	159.61	188.45	103.72	69.52	72.81	35.71	21.49	84.63												
	23.67	49.48	106.32	101.84	130.76	175.47	196.58	108.17	84.12	77.49	41.23	22.75	93.43												
	24.02	49.59	110.84	96.91	138.25	193.85	205.29	129.66	91.94	80.48	42.00	26.98	99.51												
	24.37	48.27	112.86	101.92	147.84	197.02	226.60	138.61	91.26	91.72	46.66	31.31	105.29												
	30.03	57.37	111.52	114.52	155.98	213.83	250.23	135.99	112.27	97.56	49.92	33.15	113.89												
	32.89	66.16	132.43	128.68	170.28	224.68	259.09	148.01	115.75	101.59	50.78	33.19	122.33												
	33.70	66.71	134.56	131.87	174.34	233.84	264.76																		

## Budget to Midscale Properties vs. Mid to Upper scale...the tale of two different occupancy trends

As you can see from the following STR reports, provided by a lodging in Lake George for illustrative purposes, the mid- to upper scale properties in the county are holding their own – but the budget to midscale are beginning to suffer from increased competition.

There is a significant difference in trends for Occupancy, ADR, and RevPAR between the two types of properties.

Warren County would be wise to NOT build any more budget to mid-level properties without making sure that there are corresponding plans in place for filling those new rooms without cannibalizing other existing properties. Building additional budget properties also goes against the trending data of what people want in accommodations and what the county needs – year-round resort properties with full amenities.

Tab 2 - Weekly Performance at a Glance - My Property vs. Competitive Set

Budget to Midscale Market

For the Week of: July 24, 2016 - July 30, 2016 Date Created: August 02, 2016 Competitive Set Data Excludes Subject Property

July 24, 2016 - July 30, 2016																	
		Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Total	
		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg	
Occupancy	My Property	81.6%	9.2	86.2%	5.6	86.2%	-2.6	85.1%	-9.8	80.5%	1.4	98.9%	1.2	98.9%	-1.1	88.2%	0.2
	Comp Set	65.9%	10.4	73.8%	-12.5	64.9%	-17.5	81.0%	0.4	72.5%	-1.8	90.5%	-2.8	94.4%	-4.3	77.6%	-4.6
	Index (MPI)	123.8	-1.1	116.9	20.7	132.8	18.1	105.0	-10.1	111.0	3.3	109.2	4.1	104.7	3.3	113.7	5.0
ADR	My Property	146.01	22.8	141.81	16.3	132.43	7.6	133.09	-4.3	142.76	6.1	168.20	5.7	162.55	-4.7	147.53	5.6
	Comp Set	117.15	7.4	112.16	10.1	117.12	10.8	110.68	3.9	112.98	6.2	141.65	1.7	146.90	-0.7	124.20	4.8
	Index (ARI)	124.6	14.3	126.4	5.7	113.1	-2.9	120.3	-7.9	126.4	-0.1	118.7	3.9	110.7	-4.0	118.8	0.7
RevPAR	My Property	119.16	34.1	122.25	22.8	114.16	4.8	113.21	-13.6	114.86	7.6	166.26	6.9	160.68	-5.8	130.08	5.8
	Comp Set	77.20	18.6	82.74	-3.6	76.03	-8.6	89.63	4.3	81.87	4.3	128.18	-1.1	138.71	-5.0	96.34	0.0
	Index (RGI)	154.3	13.1	147.7	27.5	150.2	14.6	126.3	-17.2	140.3	3.2	129.7	8.1	115.8	-0.8	135.0	5.7
Running 28 Days (by Day of Week)																	
		Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Total	
		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg	
Occupancy	My Property	78.2%	6.7	75.9%	0.4	78.2%	3.4	75.9%	-6.4	68.7%	-11.5	92.0%	-6.4	89.9%	-9.3	79.8%	-3.8
	Comp Set	56.6%	34.8	51.5%	-12.3	50.7%	-17.5	53.9%	-12.5	55.8%	-14.1	82.8%	-3.6	84.4%	-9.3	62.2%	-6.9
	Index (MPI)	138.2	-20.9	147.4	14.4	154.0	25.3	140.7	7.0	123.0	3.1	111.1	-2.9	106.5	0.1	128.2	3.3
ADR	My Property	137.82	22.4	127.48	12.3	125.36	8.9	126.88	3.6	129.66	4.6	156.06	-0.2	156.47	-4.2	138.19	4.7
	Comp Set	134.49	24.6	114.58	12.3	109.34	7.0	108.10	4.1	109.70	1.9	140.48	5.8	140.49	4.0	125.07	8.0
	Index (ARI)	102.5	-1.7	111.3	0.0	114.7	1.7	117.4	-0.5	118.2	2.7	111.1	-5.7	111.4	-7.9	110.5	-3.1
RevPAR	My Property	107.72	30.6	96.71	12.7	97.98	12.6	96.26	-3.0	89.05	-7.4	143.50	-6.6	140.73	-13.1	110.28	0.7
	Comp Set	76.07	67.9	58.98	-1.5	55.47	-11.7	58.30	-8.9	61.24	-12.5	116.30	2.0	118.61	-5.7	77.85	0.6
	Index (RGI)	141.6	-22.2	164.0	14.5	176.6	27.5	165.1	6.5	145.4	5.8	123.4	-8.4	118.7	-7.8	141.7	0.2

Midscale to Upperscale properties

Tab 2 - Weekly Performance at a Glance - My Property vs. Competitive Set

Midscale to Upper Midscale

For the Week of: July 24, 2016 - July 30, 2016 Date Created: August 02, 2016 Competitive Set Data Excludes Subject Property

July 24, 2016 - July 30, 2016																	
		Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Total	
			% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg
Occupancy	My Property	59.3%	-33.1	75.3%	-23.2	92.3%	-3.2	89.7%	16.8	97.9%	8.6	100.0%	0.5	99.5%	-0.5	87.7%	-5.3
	Comp Set	72.7%	0.7	90.9%	-1.8	91.9%	-5.1	95.1%	-2.9	89.5%	-2.2	92.9%	-1.3	97.2%	-0.5	90.0%	-2.0
	Index (MPI)	81.6	-33.6	82.8	-21.8	100.4	2.0	94.3	20.3	109.4	11.0	107.7	1.9	102.3	0.0	97.4	-3.4
ADR	My Property	196.48	-15.4	185.89	-18.7	189.38	-17.9	197.65	15.2	222.55	19.8	232.20	-4.1	241.58	-2.8	211.57	-4.6
	Comp Set	173.45	0.1	187.74	11.4	190.85	13.5	191.95	13.9	199.07	15.3	239.03	6.8	242.53	9.9	204.80	10.3
	Index (ARI)	113.3	-15.4	99.0	-27.0	99.2	-27.6	103.0	1.2	111.8	3.9	97.1	-10.3	99.6	-11.6	103.3	-13.6
RevPAR	My Property	116.47	-43.4	139.90	-37.5	174.74	-20.5	177.27	34.6	217.96	30.0	232.20	-3.6	240.34	-3.3	185.55	-9.7
	Comp Set	126.03	0.8	170.72	9.4	175.41	7.6	182.58	10.6	178.24	12.8	222.03	5.4	235.77	9.3	184.40	8.2
	Index (RGI)	92.4	-43.8	81.9	-42.9	99.6	-26.2	97.1	21.7	122.3	15.3	104.6	-8.6	101.9	-11.6	100.6	-16.5

Running 28 Days (by Day of Week)																	
		Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Total	
			% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg		% Chg
Occupancy	My Property	70.6%	-11.0	80.3%	-2.0	77.8%	-3.8	77.6%	-1.3	82.6%	-2.4	93.0%	3.7	93.6%	-5.8	82.2%	-3.2
	Comp Set	75.0%	23.9	83.1%	11.0	84.3%	7.1	82.8%	6.0	80.2%	2.3	90.1%	1.6	92.0%	-3.7	83.9%	5.9
	Index (MPI)	94.2	-28.2	96.6	-11.8	92.3	-10.2	93.6	-6.9	103.0	-4.7	103.2	2.1	101.7	-2.2	97.9	-8.6
ADR	My Property	200.95	5.2	191.07	2.9	180.20	-4.4	180.23	7.2	192.39	8.1	225.43	1.7	229.37	1.3	201.32	2.9
	Comp Set	190.60	13.1	182.85	12.1	174.28	6.4	176.23	9.0	181.44	6.0	230.03	8.5	232.35	10.2	196.47	8.7
	Index (ARI)	105.4	-7.0	104.5	-8.2	103.4	-10.1	102.3	-1.7	106.0	2.0	98.0	-6.3	98.7	-8.1	102.5	-5.3
RevPAR	My Property	141.91	-6.4	153.40	0.8	140.26	-8.0	139.82	5.8	158.92	5.4	209.74	5.5	214.59	-4.6	165.52	-0.4
	Comp Set	142.88	40.1	151.99	24.5	146.99	14.0	146.00	15.6	145.57	8.4	207.33	10.3	213.72	6.1	164.93	15.1
	Index (RGI)	99.3	-33.2	100.9	-19.0	95.4	-19.3	95.8	-8.5	109.2	-2.8	101.2	-4.3	100.4	-10.1	100.4	-13.4

## Recommendations for Tourism Department

We do not believe that the county's best success moving forward requires the formation of an independent, privatized tourism entity.

Rather, we recommend implementing key first steps that will strengthen and empower the Tourism Department as the tourism leader for the county; streamline and codify the process for allocating occupancy tax dollars, creating better efficiency, efficacy, accountability, and results; and create better synergy, dialog, and collaboration across the county.

Whether the tourism team remains within the county government, or evolves to form a privatized organization over time, is less important than that they are given the authority and latitude to formulate and implement 2017 budget allocation policy, plan effective marketing strategies, pursue media and marketing opportunities, plan events, conduct public relations, attend educational and industry seminars, and be able to respond to needs and opportunities as they emerge throughout the year.

The county may choose to consider forming a non-profit funding entity as Albany and ROOST have, through which specific events and programs can be funded. This can help facilitate a more efficient and accountable occupancy tax allocation process, in which qualifying projects must show they will drive out-of-region travelers, show a return on investment, and support WCT's marketing mission.

## Improve Warren County's Competitive Position

- Develop a year-round plan for driving lodging demand for both small, mid-size, and high end properties.
  - ◇ Plan specific marketing tactics for key audience segments.
- Develop a plan specifically for the shoulder seasons.
  - ◇ Plan events that support expansion of the shoulder seasons in the regions that best support seasonal events. (I.e., spring events, fall events, winter events). Planning of events should occur from a county perspective, so that similar events in different townships are not held within days or weeks of each other.
- Cultivate the perception as a year-round destination.
  - ◇ Leverage public relations and FAM tours to drive editorial exposure.

## Consolidate Your Brand

In reviewing your peers' data, information and marketing approach, what stood out the most to us was the dilutive effect on Warren County's brand of having so much marketing material produced by individual townships. In contrast, Saratoga County, Saratoga Springs, Essex, Franklin, and Hamilton Counties, Hershey/Dauphin County, and Albany drive all their marketing from a centralized entity; townships do not receive funding to produce their own marketing material, resulting in a stronger, more consistent brand.

We recommend that the review of the occupancy tax allocation process includes a restructuring of the dollars given out for marketing material. Rather, those dollars should

be retained within the Tourism Department budget to allow them to produce marketing material that will highlight the wealth of experiences available throughout the county, guided and informed by the county's overall marketing plan.

What we are suggesting is a new way to look at the county. Rather than focusing on town lines, look at the county as a combination of various experiences and regions, that can be marketed within the broader program, with the same underlying message. This will avoid the splintering of messaging currently going on.

For example, rather than Warrensburg, Stony Creek and Thurman each producing their own brochures and rack cards – all of which look different – produce a Western/Hudson River brochure that highlights the scenic, outdoor, historic, and agritourism experiences available in this part of the county – only a short drive from the Lake George/Bolton Landing lodging hubs.

In this way, townships throughout the county will still receive the benefit of marketing promotion, and the county's overall brand and marketing plan will be more cohesive, compelling, and effective. This will enhance your global recognition as a region.

This effort will require ongoing dialogue and discourse, to enable the Tourism Department to maintain a good understanding of the assets and needs of the various townships and county areas, and addresses these assets and needs in the county's marketing strategy.

### Empower the Tourism Team

- Streamline and simplify the process whereby the Tourism Department can plan and implement marketing and media strategy and respond to situational challenges and opportunities, without having to wait for the next monthly Supervisors' meeting.
- Establish an Advisory Tourism Board, consisting of a mix of tourism and business peers from the community, that will advise, support, and collaborate with the tourism team, but have no legislative authority over them.
- Continue to build dialog and collaboration within the county – with lodging partners, sites, attractions, businesses, chambers, and municipalities.
- Allow other community partners – rather than solely supervisors – to be on the Tourism Committee.
- Provide opportunities for networking, cross-selling, training, and education for tourism team and community partners across the county.

### Update the Tourism Budget Allocation process

- The Warren County Tourism Department should be given the authority to articulate and define the specific county-wide criteria and process by which budget allocations are granted to events, group, and/or municipalities. This process should also define required documented ROI and accountability. Consistent standards not tied to any political process would best serve the county.

- Allocation process should require that allocations and grants are driven by and support overall county marketing strategy – and specifically drive out-of-county visitation and visitor retention, and help achieve greater market reach, expansion of targeted market segments, extended seasonality, and increases in sales and occupancy tax revenues.

#### Take Advantage of Increased Staffing

- In 2016, WCT added two key positions – Assistant Tourism Coordinator and Communications Assistant, which, we hope, will allow for expansion into event planning and an increased emphasis on media relations and Fam Tours.
- Increased efficiency gained through a reorganization of the budget allocation process should, in time, allow for an additional staff member to ensure event planning and media relations is conducted on a regular, sustainable basis.

## OPERATIONS: BEST PRACTICES & OPPORTUNITIES

Assess assets and identity “Primary Attractors” & “Must Sees” of county and each township, as well as challenges and opportunities

### County Assets

- Spectacular Natural Beauty year-round
- Opportunity for full range of Outdoor Adventures – from rugged to recreational
- Authentic, unplugged Adirondack experience
- Family-oriented and friendly
- Rich array of activities available
- Walkable downtowns and villages
- Diverse lodging options – from “glamping” and luxury hotels to cabins, B&B’s, camping and inns
- Accessibility from the South and North via the Northway corridor
- Quality of life for those who wish to relocate

### Primary Attractors

- Lake George
- Adirondack Park
- Historic & cultural sites and assets
- Waterways – Hudson and Schroon Rivers, smaller lakes
- Gore Mountain

### “Must Sees”

- Steamboat cruises
- Factory Outlets
- Fort William Henry Museum
- Great Escape and Splashwater Kingdom Theme Park
- Natural Stone Bridge & Caves
- Gore Mountain
- Hyde Collection

### County Challenges

- Lack of public transportation. Outlying towns need access by public transportation. Even access to Saratoga would be beneficial.
- Lack of appropriate infrastructure around lake – real sewer systems, access to natural gas, public transportation, WIFI and high speed internet. Many of the older communities have failing septic systems, which endangers the lakes.

- DEC is not guest-centric, but, rather, regulation-centric – access to Lake George is not always what it could be.
- Smaller places are having trouble succeeding. . . . small cabin resorts are being bought out and turning into one or two single family units.
- Seasonality of many Lake George businesses.
- Lack of lodging in North Creek and around Gore Mountain.
- Demographics of Adirondacks area is changing – the school population is declining, and the population is aging. A good number of working age people are moving out. These migratory trends are a real challenge for the area. Challenge has to be met on a regional level.

## North Country/Adirondack Gateway (Johnsburg, Chester, Horicon)

### Assets

- Adirondack Park
- Outdoor beauty and smaller lakes: Brant Lake, Loon Lake, Friends Lake, Schroon Lake
- Close access to Gore Mountain
- Good access to/from key markets via Route 8 Corridor: Utica, Rochester, Canada, Vermont
- Outdoor recreation: fishing, kayaking, and network of trails: cross country trails, rail trails, hiking trails, Ski Bowl trails, and secondary roads that provide wonderful cycling and drive tour routes.

### Audiences

- Gore – daytrippers, 2 hours or less radius. Albany and north is core. Saratoga. They have done a lot of work in destination marketing. . . but last winter reminded them that their core is close by and vitally important. But because they don't have ski in and ski out facilities, and better amenities and better lodging, they are not seen as a 'ski destination' . . . have less name and brand recognition. So for 2016, more of their budget will be spent closer. But – Gore offers the best ski assets around – gondola, ski drop, views, authentic and simple experience, and exhilarating terrain,
  - ◇ Was recently selected as one of top 5 under-rated resorts in North America.
  - ◇ Syracuse as a market is half day trippers, half overnights. NJ accounts for about 15%; 5% come from PA; 3% from CT.
  - ◇ Biggest ski group comes from Toronto. Some from Montreal.
  - ◇ Families are largest market.
- For North Creek, second home owners are the bread and butter sustenance from May to September
- North Warren Chamber (Brandon Himoff) reported that most of their lake and summer visitation comes from New York metro, northern NJ, Westchester, CT, and French-speaking Canada. Wedding traffic comes from the Albany area (roughly 40%), the Northeast, and around the country. Their summer and family camps draw primarily by word-of-mouth from the suburbs of New York and NYC, with the remainder from CA, FL, and Chicago; NYC diaspora; or friends with people who have connections to the Adirondacks. A smattering of campers are international.

## Challenges

- North Creek/Gore needs a hotel. They can't compete with resorts in Vermont and New Hampshire, who are doing a lot off-mountain to make the place attractive – water parks, golf, lodging, etc. In order to really make Gore a winter recreational destination, they need a hotel.
- The area suffers from an identity problem. They are not perceived as being part of Lake George; people who are not looking for Lake George pass them by. Nor are they necessarily recognized as part of the Adirondacks, which is seen as much larger. Their outdoor assets and low key Adirondack experience must be woven into the overall Lake George area brand.
- Summer at the Ski Bowl offers limited activities. Scenic gondola ride – picks up in the fall. Downhill extreme mt biking is open on weekends only. Businesses have presented to the town board a request to have operations at Ski Bowl year-round – then could include a zip line and other 3-season activities.
- Poor signage on Route 87 and Route 8, and at the turnoff for North Creek.

## Opportunities

- People are looking for the “real Adirondack mountain experience” – away from the hub bub of Lake George Village. This part of the county is perfectly suited to those who seek “Adventure Tourism” year-round and are not interested in trinkets or the semi-urban character of Lake George Village.
  - ◇ Families and older travelers seek the serene and peaceful nature of the northern area.
  - ◇ Millennials are looking for and interested in the wealth of activities available: outdoor, bicycling, quiet nooks, and the growing “foodie” experience.
- This part of the county offers opportunity for four season marketing and visitation.
- Ski Bowl is expanding their Nordic terrain. They have hosted hundreds of kids at a time, at the Ski Bowl for cross-country races. They have snow-making and lights, and 2K trails – **double** that of anywhere else in the NE. They can now offer RELIABLE SNOW FOR THE SPORT – worth promoting! Also, snow shoeing.
- They are looking for the county marketing efforts to add reasons for people to travel there from Lake George during summer. Most common web searches are for fishing, hiking, cross country skiing, canoeing, biking, camping, swimming, kayaking. These activities could be promoted as part of the Adirondack outdoor experience.

## Recommendations

- Convey some of other larger assets within the Lake George area – such as Gore – within brand, and communicate extended outdoor activity season.
- Apply the principles of Nature-based Tourism Marketing to this region.
  - ◇ Support trail advocacy
  - ◇ Promote combined recreational, dining and outdoor activities and events
  - ◇ Combine train excursions with outdoor/trail events
- Blur town lines. Instead, promote the North Country as the gateway to the Adirondacks mountain experience and as a base for further exploration. Convey the range of experiences and activities available for different market segments.

- Tailor messages to key niche markets: bikers, birders, hikers, kayakers, white water rafters, skiers, families, etc. Communicate and promote the wealth of outdoor and other experiences available in the “North Country/Adirondack Gateway.”
  - ◇ Adirondack Museum
  - ◇ New cycling clubhouse “The Hub”
  - ◇ Farm to Table and Craft Beverage establishments
  - ◇ Saratoga & North Creek Railroad
  - ◇ Events like the Chester Challenge, Race the Train! and Rum Runner Weekend
  - ◇ Excursions like Wild Flower Trails, Garnet Mine tours, and the Gondola at Gore
  - ◇ North Creek as the “town at Gore Mountain”, off the beaten trail, authentic and quaint
  - ◇ Learning “how-to” workshops
- Promote rail bike three-hour guided tours for Spring/Summer/Fall 2017, run by Renegade Railriders, as part of the Saratoga & North Creek rail biking project.
- Create high-quality lodging that is currently lacking in the central Adirondacks tourist market. This will complement and help sustain the otherwise growing destination attractions in the area, including winter sports and summer, water-based recreation. The location of the proposed hotel will directly benefit the local business community.
- Build and promote self-powered trails and lodging as part of the Adirondack Community-Based Trails and Lodging System (ACTLS), creating a world class hut-to-hut system linking communities in the Adirondack Park.
- Create driving tours, cycling tours, and itineraries that package and celebrate the trails, scenic secondary roads, and offerings of the area.
- Better serve visitors: following the example of a program Gore ran one year, collaborate with the chambers and get out to visitors, taking surveys, talking to them, asking them everything about their experience...and have them rate the “Adirondack Gateway” area based on likelihood to make a recommendation to a friend.

### Community Partner Comments & Suggestions

- County’s efforts would be well served to reach out to Utica, people coming in to new high tech, Global Foundries, letting them know about this whole new life and things to do. Many new foreigners.
- Bring back “Rates & Dates” sheets, and make them available online again.
- Provide county branding guidelines to smaller groups developing their own material.
- Restore access to county visitor lists and the ability to attain labels sorted by interest or origin.
- Look at the county’s diverse assets, and market them all. This area struggles with the logo and message being solely about Lake George....county needs to expand upon the brand so people understand ALL that is available to them within the Lake George experience.
- Have more dialogue with the chamber and business partners, so all can act in harmony, and incorporate county messaging into their efforts. Gain more traction through shared messaging, discourse, and using common themes.

## Western Hudson River Region (Thurman, Stony Creek, Warrensburg)

### Assets

- Agri-tourism
- Outdoor and waterway recreation
- State parks and horse trails
- Small quaint villages and downtowns

### Audiences

- Sportsmen and fishermen
- Campers and horse riders
- Out-of-county visitors staying at lodging properties in Lake George, Bolton and Queensbury who are interested in family-oriented, "rustic" and agricultural excursions
- Out-of-county visitors staying at lodging properties in Lake George, Bolton and Queensbury who are interested in luxury, high end agricultural products
- High income/luxury out-of-county daytrippers and agri-tourists within roughly one hour drive (Albany, Saratoga, Schenectady, northern New Jersey, Northway Corridor)

### Challenges

- Few lodging properties and campgrounds
- Poor signage and rural nature of area can be intimidating to visitors trying to find their way and explore new experiences

### Opportunities

- Build tourism and resiliency along Adirondack Blueways
- Continue to position themselves as day excursions from Lake George/Bolton/Queensbury lodging properties
  - ◇ Families and couples
  - ◇ Bus tours

### Recommendations

- Help remove Fear of Travel by improving signage throughout townships, and providing self-guided Driving Tours. Travelers will be more willing to venture around the county if they can easily find their way.
- Work closely with Warren County Tourism and lodging properties to develop excursion-based getaway packages of interest to travelers, as well as itineraries and driving tours.
- Develop a riding tour (horse trail) map for that market segment. Create messaging and packages around "horse" vacations.

## Northern Lake Towns (Hague, Bolton)

### Assets

- The Pinnacle - Peak is attracting visitors from all over to Bolton (3,500 summer of 2016)
- Lake George - without the bustle of the village
- Bolton Marina
- Gorgeous mountain scenery and hiking
- Trout and bass fishing

### Audiences

- Pinnacle: CT, all over NY, New Hampshire, FL, locals, etc.
- Bolton: Northway Corridor, northern NJ, affluent
- Hague: seeing a large increase in second home ownership
- Sagamore: mostly from NYC, Westchester, LI, Philly, Northern NJ (bread and butter).
  - ◇ Mid-June through first Week September. 60% family, 40% couples. Family reunions, length of stay for families are longer. Rest of year primarily couples and groups, FIT (Foreign Independent Travelers).
  - ◇ Shoulder seasons - heavily rely on groups.
  - ◇ Groups from all over state, and larger NE - Boston to Buffalo, Montreal to Philly. Some internationals. Sales in Chicago, DC. . . . do number of programs with GE. Four sales associates. Centralized sales effort through owners' other properties.

### Challenges

- Much of Lake George Village and Hague shuts down after Labor Day.
- Challenge of all small communities - economic scale - all small towns need to have infrastructure and maintain level of effort on much smaller community base.
- Increase in second home population brings a whole new dynamic and demographic into the area - people who are content to stay in their new large lakehouses, and rarely venture out into town or participate in community events.
- Silver Bay Camp & Association, through a \$4 million expansion, now provides such a complete experience to their guests that they also rarely venture out into town or participate in community events, impacting other businesses in the area.
- Ticonderoga Chamber actively recruits and pulls businesses from the Hague Chamber, depleting its membership and resources.

### Opportunities

- Increased visitation can be gained by pushing the seasons out. Add events in Fall and early Spring, and work to increase weekend traffic even further.
- Hold a Fishing Tournament in Spring rather than July. Look at Grassroots Events that can help drive interest from market segments and extend visitation.

### Community Partner Comments

- Maintaining repeat visitation is critical. Lake George and Bolton represent 25% of entire assessed value of the county. Hague and Queensbury also rank high.
- Factors that impact visitor retention:
  - ◇ Maintaining quality of lake (sewers)
  - ◇ Services visitors get when they're there
  - ◇ Activities, events, programs
  - ◇ Safety, scenic quality
  - ◇ Development and sustainability of major assets and "must sees"
- Could use support from county to extend shoulder seasons and attract the group market.

### Recommendations

- Work closely with the tourism partners here to develop excursion-based getaway packages of interest to travelers, as well as itineraries and driving tours.
- Develop events that can help draw visitation.
- Look at programs that will encourage second home owners to feel part of the community, and become more involved.

## Lake George (Town & Village)

### Assets

- Historic, Great Escape, shopping, Eagle's zip rider, Adirondack Extreme, and other forms of recreation that visitors can't do at home
- Fort William Henry

### Audiences

- 90% within an hour from NYC. Many of those communities have changed greatly over the past 10 years
- 60 mile radius – NYC, mid Long Island, eastern CT (Danbury).
  - ◇ Route 87 Corridor

### Challenges

- For winter: (it's about perception) "there's nothing open in the winter." The county needs to change perception about that by stringing winter events together, and create a presence for the season.
- Decline in Occupancy
  - ◇ Rates are relatively high in area
  - ◇ County needs more year-round draw
  - ◇ Winter Carnival could use an injection of something new, or more draw
  - ◇ Increased Competition (exit 18 and three new hotels. Will be a problem for 9 months of year)

### Opportunities

- Consolidate activities and spending for greater, unified county-wide impact and branding.

### Recommendations

- Dedicate tourism department staff time to planning and coordinating new events
- County should provide greater funds to the Chamber as the current CVB, to help attract groups and events.

### Community Partner Comments & Suggestions

- Feels \$4 million budget is too splintered - parceled out among townships. Original law does now allow for this kind of local disbursement. Hopes this process will lead to re-invigoration of county.
- A partner wondered if, as time goes on, rising tourism pensions and other costs will eat up too much of \$4 million occupancy tax.
- Can we promote for the winter by lighting up the whole village.
- People are eyeing up what they see as a \$2 million surplus. A partner is concerned it will get chopped up or dissipated on costs that are not really tourism marketing (as guidelines of original law get more and more loosely defined)

- Main county events (like Americade) are still receiving a good amount of funding. What is ROI on these events? Perhaps it's time for established events to get weaned off funding so there are more dollars available to fund and kick start new events.
- Tourism should be more autonomous – able to respond more quickly without cumbersome approval process of supervisors
- Provide more packages and itineraries for prospective visitors
- Educate and inform to correct disconnect among local population between their idea of “those pesky visitors” and how many jobs and livelihoods depend upon tourism
- Civic Center just got three year funding package – really more for community – but no ROI for tourism
- There needs to be more cooperation and collaboration among tourism community

## Queensbury, Lake Luzerne & Glens Falls

### Assets:

- Natural beauty
- Quality of Life = combination of the arts, the culture, the recreation, the affordability, the proximity to NYC and major metro areas. Location, location, location. Easy to reach Montreal, Boston, or NYC. This area has it all; you can find everything you need.
- Glens Falls is a unique small city, with a great catalog of activities, cultural attractions, dining options, and more. It offers architectural integrity, safety, walkability, accessibility, the Civic Center, Symphony, the Hyde Collection, shops, and a growing number of restaurants. Glens Falls has retained its nostalgic architecture, and a unique identity and integrity. They see themselves as nestled between Lake George and Saratoga – a small but powerful engine for the county.
- Bike Trails that rival Vermont and Massachusetts yet are within easy access to the downtown.

### Audiences

- Business and leisure travelers – NYC, metro area
- Day trippers from Albany, Canada, and within county
- Overflow from Saratoga (only 20 miles from track)
- Thruway NE Corridor – could reach out more to CT and NJ, VT and MA
- Millennials looking for outdoors, new experiences, authentic experiences
- Great Escape Lodging:
  - ◇ NYC burroughs and metro area (includes LI and norther NJ)
  - ◇ Albany
  - ◇ Canada
  - ◇ Burlington, VT and Plattsburgh, NY areas

### Challenges

- Water parks are exploding in the Poconos, and are creating strong competition for Great Escape.

## Opportunities

- Extension of the runway at Floyd Bennett Memorial Airport could help Warren County become more competitive in the private and business jet market and attract more corporate business to the county.

## Recommendations

- Make more of available open spaces
  - ◇ the West Mountain Ski Center – which offers a wide open grassy area for warm weather and shoulder season events – is currently vastly underutilized.
  - ◇ Municipal Parking Lot – empty on weekends
- Promote Glens Falls chic but quaint downtown, dining and cultural assets, and easy access to bike trails and the outdoors to Millennials, both as visitors and potential entrepreneurs, business owners, and relocators.

## CVB: Special Events & Group Events

### Assets

- Glens Falls Civic Center (<http://www.glensfallsc.com>)
- Festival Commons – could be considered to be Civic Center without walls
- Dome (<http://www.adirondacksportscomplex.com>)
- Forum (<http://www.lakegeorgeforum.com>)

### Challenges

- CVB needs more funding
- CVB wants to be able to hire more people
- BIGGEST OBSTACLE: lack of convention center
  - ◇ can't compete with Saratoga, Albany, Buffalo

### Community Partner Comments & Suggestions

- Really work emarketing. Treat email list like really special. Work automated marketing.
- County should have mobile. Trip Planner on site. Engage (with prospective visitors) in fun and loving way.
- Current focus is on Lake...but county needs to promote more of the anchor assets within the county. There is an incompleteness that exists – bring all the assets together in one place and showcase them
- There's still demarkations between townships that get in the way.

### Recommendations

- Provide CVB with more funding to be able to more adequately court and attract event planners.
- Make more of existing assets.
- There is NO ONE within the county charged with **GENERATING OR CREATING** new events from scratch. This is different than the CVB's efforts to convince event planners to bring pre-existing event packages to the county. Tourism Department needs to be empowered to take ownership of generating new "homegrown" events.

## Opportunities for experience bundling – itineraries, linked events, and packages

- Expand the current focus on Lake George by creating itineraries and packages that promote and highlight more of the anchor assets within the county. These assets can be showcased as explorations and experiences within and part of the larger brand.
- Remove the emphasis on townships. Instead package and combine experiences more in tune with **how prospective travelers think and plan.**
  - ◇ Fall, Winter and Spring events
  - ◇ Fishing, cycling, hiking
  - ◇ Agri-tourism
  - ◇ Outdoor Adventure
  - ◇ Multi-faceted Travel Adventures
- Add a dedicated Event Planner to the team.

## Recommended opportunities for cooperative collaboration between partners and stake holders

- Foster more cross-promotion and education:
  - ◇ Brochure Exchanges
  - ◇ Lunch and Learns on topics of interest to your tourism partners
  - ◇ Seminars and workshops, travel expo's
- Help people better understand the STR reports.
- Organize and host culinary, travel, and group expos.
- Provide training and seminars on the international market to the business community.
- Subscribe as a county to Medallia, which would provide ongoing market data, visitor surveys, and visitor profiles to the Tourism Department, which in turn could share this important information with the county's partners.
- Facilitate better sharing of information between the tourism office and tourism partners.
- Encourage chambers to function more powerfully as business organizations, facilitating the transfer of their more tourism-related functions to Warren County Tourism.

## Recommendations for empowering Warren County Tourism

- Each year, Warren County receives more inquiries than they had the year before – planning must address how to capture and engage inquiries.
- Develop tactics for building coalition between stakeholders: hoteliers, economic development, campgrounds, attractions, and chambers throughout the county.
- Obtain full Smith Travel Reports, including breakdowns among low, mid, and highscale properties.
- Consider investing in a county-wide subscription to Medallia, which would provide visitor information, surveys, and market profiles to help inform and guide strategy.

## Recommendations for Funding Sources, Allocations and Return On Investment

- The Warren County Tourism Department should be given the authority to articulate and define the specific county-wide criteria and process by which budget allocations are granted to events, group, and/or municipalities. This process should also define required documented ROI and accountability. As major events gain longevity and attendance, then monies can be gradually diverted to new opportunities and events.
- Allocation process should require that allocations and grants are driven by and support overall county marketing strategy – and specifically drive out-of-county visitation and visitor retention, help achieve greater market reach, expansion of targeted market segments, extended seasonality, and increase sales and occupancy tax revenues.
- Supported events and funding should represent best value for investment.
- Events and investments that do not meet criteria will not be funded, and those that can not prove ROI should not be fully eligible for funding the following year.
- Community grants for events and improvements must pass this criteria and should satisfy the requirements of the occupancy tax law.

## Community Partner Comments & Suggestions

- Look at how the dollars are spent – review what assets draw and attract tourists. Work on packaging them and marketing them differently. Communicate how to enhance visitors' visit to Lake George . . .to complete that visit . . . know all there is to experience within the county
- Create a more regional approach
- Supervisors are not tourism professionals . . . need an organization of professionals running marketing of county. Supervisors keep digging into occu tax funds. Set up is not a professional method for making decisions. Joanne and Peter should be able to go to professional conferences and educational seminars. Should be able to react and respond to new opportunities. Let Joanne and Peter report to a professional board as leadership – a board not dependent upon elections. Decisions should be taken out of hand of politicians, who naturally have a career and votes at stake. Not fair to them (the supervisors).
- My concern is the county having a centralized common theme/voice....and to make sure that bed taxes are spent in best fashion for all of us . . . how to make best investment. How can we make Tourism as effective as possible . . . could they use more staff? Do they have the support and staff they need in order to do the job they need to do?
- Go to Legislative Body of the County to make decisions...wouldn't have petty fighting over buckets of money that are so split up that are not effective. When Supervisors get together, they lose direction.
- Create a Tourism Advisory Board that would advise and guide Tourism Department.
- Tourism Marketing Committee could be made of representatives from each town – but not just the Supervisors – business people and professionals
- Tourism should have larger say over distribution of occupancy tax dollars and management of marketing budgets. Standard process for determining allocations, and required reporting to confirm ROI.

## BRAND & MARKETING STRATEGY

### Domestic and International Trends

#### Across the Region

Warren County sits astride two regions. According to NYS, Warren County is part of the Capital Region Economic Development Council, and certainly the Capital Region offers opportunity both as a market and as a potential collaborative partner. On the other hand, the northern reaches of the county resonate with some of the challenges and opportunities of the North Country Region. We took a look at both regions' long term plans and latest progress reports, to identify trends and opportunities available to Warren County.

#### **Community-driven thinking is key to economic development and growth.**

- Warren County must think and act as a cohesive entity, empowering its people to work together and share ideas, moving away from competitive pockets of population towards more supportive, collaborative partnerships.
- Warren County must also reach further to participate and collaborate with peers on a regional level, forming new and expanding existing networks.

#### **Pay attention to Transportation & Location Opportunities**

- Leverage Warren County's unique geographical location so close to major urban transportation hubs to better link Warren County with external markets. (Counties just above you in the North Country region DO NOT benefit from that kind of access to an urban center).

#### **Nearly 60% the Capital Region's Population will be eligible for Retirement in the next 5-10 years – higher than NYS overall.**

- Work to build year-round employment opportunities AND attract Millennials as visitors, prospective residents, and future leaders.
- Leverage the Capital Region's higher education assets and level of college attendance; market to students and parents.

#### **The Capital Region has the second highest concentration of creative jobs amongst metropolitan regions of similar size in the ENTIRE COUNTRY – after Sarasota, FL.**

- Incorporate the region's creative places and cultural assets into Warren County's brand, attracting tourists and new residents. Albany and Saratoga have over 50% of the creative activity of the region between them – prime candidates for collaborative partnerships and packages. The Lakes to Locks Passage serves as an example of successful regional collaboration.
- Pursue opportunities for year-round festivals and events revolving around music, visual arts and crafts, and literary arts, which can have a major impact on tourism.
- Create a unique sense of place by linking your superb natural assets with the cultural assets of Glens Falls and your other small downtowns and villages.

## Opportunities Across the State

New York State tourism has grown exponentially ever since Governor Cuomo prioritized it as a key economic driver for the state. Last year, tourism contributed to New York State's economy more than ever before.

The state's investment in tourism and the I Love New York marketing program offers media and marketing opportunities highly relevant to Warren County's assets and goals:

### Segment Marketing Initiatives

- LGBT program
- Ski Areas of New York (SANY)
  - ◇ A winter campaign with Ski Areas of New York (SANY) encourages visitors to come experience skiing and snowboarding in Upstate New York. The campaign includes various promotions such as 4th Graders Ski Free, Ski & Stay offers, as well as the 10-10-10 promotion, in which participating ski areas offer 10,000 lift tickets for \$10 for one day only. It looks like Gore participates, so WCT should promote it!
- Path Through History website, Path Through History Weekend in June, and collateral.

### Strategic Partnerships

- I Love New York / JetBlue partnership brings 14 flights and over 2,000 passengers a week into the Capital-Saratoga vacation region from Fort Lauderdale and Orlando – a market segment worth examining.
- A partnership with the Olympic Regional Development Authority (ORDA) allowed for the promotion and organization of "Winter Jam 2015," a major winter tourism event in New York City. Warren County should be a player in any "Winter Jam 2016".
- Viator, the #1 reseller of tourism products in the world, has teamed up with the NYS Division of Tourism. As a result, New York State attractions are able to be booked on-line by travelers, a particularly powerful tool of high interest to international visitors. Work with your site and attractions partners to make sure Warren County is represented on this powerful platform.

### Available NYS Media Programs

- Advertising/Paid Media
- Public Relations/Earned Media
- Digital Marketing/Owned Media
- The I Love New York Mobile Visitors' Center (aka "The Pod") to appear at an event
- Consumer Travel Tools

### Leverage Funding Opportunities from the State

- Pursue funding opportunities for tourism, downtown revitalization and infrastructure needed to enhance quality of life and foster future growth.

### Recommended Reading:

- Capital Region Economic Development Council 2015 Progress Report
- Capital Region Creative Industry Report
- North Country Regional Economic Development Council 2015 Progress Report

## Market Segments and Opportunities

### Connecting Millennials to the Lake George / Adirondack Experience

Millennials are a large group spanning 19 years – even more extensive than their parents, the Baby Boomers – and comprising 25% of the U.S. population. About 30% of them are now over thirty; they are advancing in their careers, and are the new parents.

It's critically important to know about and attract these younger travelers because they are the next generation of tourists; they are ready to become the next group that love and return for the Lake George/Adirondack experience.

#### Millennials think differently

Experiences hold the most value for them, and shape how they define themselves. Experiences are also meant to be shared – and sometimes, a Millennial will take on an experience just to have something to share.

Put simply, most Millennials prefer experiences over possessions.

#### Millennials appreciate natural, scenic and outdoor assets

They travel regionally more for:

- leisure and cultural activities (62%)
- sporting and outdoor activities (38%)

The outdoors has a connection for them:

- 60% have been camping in the past year
- 33% have done winter sports in the past year

Yet Non-sporting activities hold even greater interest for them:

- Only 23% consider themselves and “outdoors” person
- 78% are interested in visiting cultural sites
- 64% in food, wine and breweries
- 65% want to learn a new skill
- 66% in farmer’s markets

But:

- They don't know where to start planning.
- They have a general lack of awareness of everything the region has to offer.
  - ◊ They are unaware of the opportunities available to learn and try new things, explore craft beverages, have new and unique experiences, or enjoy great food.
- Distance and transportation options present a challenge.
- They seek variety.
- The “Adirondacks” represent one possible destination among many – Catskills, Poconos, Hudson Valley, Finger Lakes, Vermont, Cape Cod, Maine, and New Hampshire – and they are considering all of them.

### Millennials lean towards finding 'adventure' in their travels

Sixty% say they prefer to have adventures or find unexpected experiences in their regional travel. Only 33% say they prefer to relax and recharge. Yet their definition of adventure aligns closely with their expressed travel interests. To Millennials, adventure means:

- Getting into local culture, history or attractions (76%)
- Learning a new skill, like a sporting activity (65%)
- Trying out a new hobby, making something, learning something out of the ordinary (60%)

### Proximity is important to them

Forty-one% say they don't like to travel more than 4 hours for a regional trip. However, the distance factor is not just about travel time. It has to do with equated length of stay, and **the fear there won't be enough to do at the destination.**

*"If you're going for more than a day or two you need lots of different activities. What if it rains? What if you get bored? You can't just hike."*

*- Male, Albany*

Millennials primarily self-plan and design their trip ahead of time (54%), while some get to the location and make it up as they go along (36%), with only 9% using a pre-packaged trip. For those who like to plan ahead:

- 48% find places to stay or eat first
- 42% find activities they want to do first

For the improvisers:

- 60% like to travel to places where "I don't always know what will happen next"

### Trip Inspiration

Millennials find their regional trip inspiration from:

- Social / Web
  - ◇ 86% Word of mouth (social evidence)
  - ◇ 82% Web sites / blogs
  - ◇ 68% Social media posts
- Mass Media
  - ◇ 64% Print media
  - ◇ 60% Video
  - ◇ 46% Ads / sponsored content
- Curators
  - ◇ 47% Emails
  - ◇ 46% Group buying sites (e.g., Groupon)

A solid 44% believe they suggest ideas for regional travel destination most often; they like to feel they are "in the know", and that they are the first to suggest travel destinations.

However, being the one to suggest or choose a destination for their group puts them under pressure to “get it right.”

This same social pressure has an impact on why they do not choose the Adirondacks as a destination. **This is important to know!!!**

- 44% I feel like I need to persuade people to go along with my regional travel ideas
- 12% It would be hard to get others to come with me
- 10% My friends haven't been
- 10% I haven't seen anything online or in social media

### **They don't just travel with friends**

- 25% Friends
- 26% Significant other
- 42% Family

### **Millennials are the New Parents**

- 37% of survey respondents were parents
- They want flexibility, amenities, and trips that suite their children's needs
- They have high hopes for the impact of regional travel on their kids, with the majority wanting their kids to learn new skills and to learn how to be in nature

### **Social Media endorsement is important to them**

Millennials like to know that their peers endorse prospective destinations, and find higher credibility in organic chatter. This is the content found on social sites, reviews, etc. – traditional word-of-mouth elevated to the digital world, in real-time.

Building an authentic, cohesive, consistent presence on the key social platforms Millennials turn to for travel information is key for Warren County.

By building ways for them to be engaged, and share user-generated content, WCT can help Millennials imagine themselves (and their families) experiencing and enjoying the Lake George area and Adirondacks.

### **Millennials use technology to plan and book their trips. (No surprise!)**

They browse travel sites and blogs, see travel ads, use travel apps, and book travel online – still more frequently using their desktop or laptop to do so, rather than their phone.

Even images shared on Instagram can have an impact on where they decide to eat.

Having the capability to book on your web site would be helpful to Warren County.

### What this means for Warren County – Important Takeaways:

#### Millennials don't know where to start planning:

- Utilize mobile and digital marketing to capture Millennials as they're planning.
- Utilize web and digital assets to help them visualize and design their trip.
- Give them specific ideas through suggested itineraries and travel adventures.
- Consider how to partner with lodging sites like Airbnb, HomeAway, or AdirondacksByOwner to tailor lodging packages to attract this under 35 market.

#### They have a general lack of awareness of everything the region has to offer, and the "Adirondacks" represent only one destination among many:

- Elevate your brand by conveying your multi-faceted travel experience.
- Highlight amenities like grocery stores, shops, restaurants, and Wifi, and cultural assets like museums, galleries, theaters, and music venues, which Millennials may not know exist.

#### The further the travel distance, the more variety Millennials need:

- Redefine Warren County's multi-faceted travel experience – outdoor, cultural, and culinary – as the perfect authentic **travel adventure**.
- Tie activities with lodging and dining experiences, and visa versa, so Millennials are sold on what they are looking for.
- Create a sense of Unexpected Possibilities for those who like to improvise.

#### They like authentic travel experiences and GOOD FOOD:

- Promote the local, cultural flavor of your true Adirondack Experience – uncomplicated, unique, not too "tourist-y", and "how things used to be".
- Use interesting vintage or historic photos.
- Promote your dining assets and craft beverages!
- Promote the "softer side" of the Adirondacks to those who are not hard-core "outdoorsy" or who have limited travel time.

To distill this even further, Millennials are looking for authentic, diverse, and even unusual travel experiences that offer "adventure", unique new experiences for themselves and their children, and help them define who they are. They like a sense of the "undiscovered" and like to feel they are choosing unbeaten paths.

*(Source: Study conducted by the Wild Center, January 2016; Guidebook, October 2016)*

## International Markets

### Expanding beyond the Canadian Market

Canadians are not the only ones interested in the type of travel experience offered by Warren County. The German and UK markets are interested in outdoor activities, year round, and right now there is no Adirondack destination really responding to this opportunity.

Offering the full Adirondack experience, yet situated in closest proximity to Albany and metro airports, Warren County is in prime position to take the lead and position itself within the international market.

Other markets that send millions of visitors to the U.S. each year include Japan, China, Brazil, Australia, France, and South Korea.

Besides the outdoors, international visitors are also highly interested in: Shopping, Sightseeing, Fine Dining, National Parks/Monuments, Art Galleries/Museums, Small Towns/Countryside, and Historical Locations.

### Characteristics (Both Leisure and Business Visitors):

- Overseas Travelers plan their trip, on average, 97 days in advance, and reserve their airline tickets, on average, 71 days in advance.
- 76% are traveling for a vacation/holiday or to visit friends and relatives.
- 24% are taking their first international trip to the U.S.
- The average length of stay falls at 18 nights.
- The average # of Nights in a Hotel/Motel is 9.7.
- The average age for a female is 39; the average age for a male is 41.
- They travel in small parties – average party size is 1.7 for ALL visitors; average party size is exactly 2.0 for leisure travelers. Not surprisingly, most (90%) of travel parties are adult only.
- New York State enjoys the largest market share of states visited at 29% (over 31% for leisure travelers); New York City has the largest market share of cities visited at 28%.
- Per Party Travel Expenditures in the U.S. average \$2,912.
- They spend most of their money on Shopping, Gifts & Other Purchases, Lodging, and Food and Beverages.
- Their primary occupations are in Management, Business, Science, and the Arts.

*(National Travel and Tourism Office, Profile of Overseas Travelers to the United States: 2014)*

### What this means for Warren County – Important Takeaways:

**Overseas Travelers plan their trip, on average, 97 days in advance.**

- Knowing the length of their decision cycle allows WCT to plan international outreach accordingly. Start marketing in the winter for spring and summer travel.

**24% are taking their first international trip to the U.S.**

- This means that 76% have already been here at least once. Two market segments present themselves as a result of this information. The first are the many potential international visitors that have not been here at all – develop a strategy to entice more first-time visitors. The second are those who have already been to the US, and who have probably already been to New York City and other major attractions – develop a strategy that invites them to explore the authentic American experience further and more in-depth.

**New York State enjoys the largest market share of states visited at 29% (over 31% for leisure travelers); New York City has the largest market share of cities visited at 28%.**

- Good news for Warren County – New York State and New York City are already highly desired and visited locations within the U.S. Leverage that awareness and travel preference, *and your close proximity*, and draw international visitors up the N.E. corridor and out of the city.

**The average length of stay falls at 18 nights, and Per Party Travel Expenditures in the U.S. average \$2,912.**

- Obviously this is a lucrative market. We do not see much attention being paid to the international visitor by other Adirondack destinations. Focus on the markets with the largest potential and those whose interests most closely align with your offerings – the UK and Germany, to start – and develop a short-term and long-term strategy to attract them.
  - ◇ Pursue print, digital, and editorial opportunities, both through BrandUSA and dedicated travel publications.
  - ◇ Develop dedicated content on your web site and social media for the international tourist.
  - ◇ Leverage Marketing Automation to create tailored e-communications for international queries and web visitors.

**They spend most of their money on Shopping, Gifts & Other Purchases, Lodging, and Food and Beverages, and their primary occupations are in Management, Business, Science, and the Arts.**

- We know how they spend their money, how old they are, and the kinds of interests and occupations they come from. Use this data to target potential travelers!

## Marketing Strategy Review and Recommendations

Your 2015 Committee notes and Marketing Plan identified the following Marketing Opportunities and Options:

- Boost weekday occupancy
- Reposition Lake George and the surrounding areas as a multiple season destination to those who may not have otherwise considered it, in both leisure and group markets
- Emarket more frequently, and to segmented lists
- Continue to enhance your web presence
- Provide better promotion of camping, fishing, museums, and fall and winter activities
- Better meet the needs of group tours
- Take advantage of new and emerging marketing technologies
- Improve tracking and ROI
- Pursue Millennials and International group travel
- Stress flexibility, customization and multi-generational interest

We agree with the above bullet points, and have recommendations of our own – read on!

### Review the foundation for your strategy: Who? From where? What do we want them to do?

- Plan for desired audiences – who do we want to bring here, and what do we need to do to be ready?
- Bundle assets into short events and packages and promote early on. Make the most of your:
  - ◇ authentic Adirondack experience and rustic nature
  - ◇ historic heritage
  - ◇ agritourism
  - ◇ outdoor hiking, biking, trail, golf, and water assets
  - ◇ culinary and cultural assets
  - ◇ available multi-faceted travel experiences

### Define and target Market Segments and Opportunities

- Plan marketing strategies and events geared to important market segments:
  - ◇ Younger audiences – Generation Xers and Millennials
  - ◇ International audiences – Canada, Germany, UK, Australia, China
  - ◇ Spring and Fall shoulder season event visitors
  - ◇ Outdoor enthusiasts
  - ◇ Agri-tourists
  - ◇ Golfers
  - ◇ Ethnic groups with high visitation – for example, Indian Americans
  - ◇ The 'Rec' component – travel team/tournament audiences and network of travel sport parents
  - ◇ The more wealthy, independent traveler, with higher income that can be spent on dining, agri-tourism, high end lodging, culture, history

### Define and Consolidate your Brand

- Ignite the core strengths of Warren County. Beyond the primary assets of Lake George and the Adirondack mountains are the network of supporting assets and excursions primary to your brand and of interest to Millennials, international travelers, and families.
- Reach out to potential visitors based on assets as well as events.

### Think on a Regional Scale

- Leverage being part of Capital Regional District, and take a holistic approach for the County; explore working with other like-minded communities to pool funds and create a regional draw and regional packages. Collaborate with Albany, Saratoga, and others within the Capital Region.
- In a very practical way, keep up with the rest of the Capital District. Push for universal broadband across the county.

### Expand your Season

- Incorporate Event Planning and Public Relations more fully into your marketing plan.
- Foster the growth of new events and publicize existing events.
- Approach event planning from a county-wide perspective. Work with towns to develop specific excursions and events that will attract people in the Spring and Fall, to increase visitation during April to June, and September through November.
- Expand current winter events, and/or link similar events together to create a seasonal winter Adirondack experience that people can tap into on different weekends, in different towns. THINK AND PLAN AS A COUNTY, NOT AS INDIVIDUAL TOWNSHIPS.

### FOR EXAMPLE:

- Are a few sites planning ice bars this winter? Create an Ice Bar Trail and turn small individual happenings into a month-long event.
- What can be bundled into a Holiday and Fall culinary, cultural or family multi-site multi-weekend experience?

## Marketing Material Review and Recommendations

### Web Site

- Enhance web site and drive marketing there.
  - ◇ Reshaping web site provides opportunity for increasing time spent on site and decreasing bounce rate.
  - ◇ Almost as many people are using their mobile device as their desktop to view and explore your site. They certainly use their phones to find things to do and dining options. A responsive site is a must.
  - ◇ Your highest percentage of New Sessions is among the 18-24 age group, but they also have the highest bounce rate. Curating content and experiences for the Millennial segment is critical to keep this group interested and on your site. They need more than endless listings.
- Although we recognize the need to provide information about specific businesses, lodgings, and sites, we strongly recommend creating a more experiential feel to

the web site, and providing much more in-depth experiential **content**. Remember, story-telling is your goal. How can people make memories? If you need to increase your photo inventory to help you do that, then make photo shoots a priority. Build an extensive library of images.

- Help your different market segments envision what a multiple-day stay would be like. Create itineraries, travel tours, and packages around the interests and assets that match different market segments, and that highlight different areas of the county. Each of those areas has a different feel and character – celebrate those unique qualities, and package them as excursions and getaways, using the lodging available in Lake George, Queensbury, and Bolton as hubs.
- Don't be afraid to curate content or provide the "best" of each type of experience – steer travelers to your Travel Guide to find out more specifics.
- Add trip planning functionality.
- Consider adding a booking mechanism to your site. Software exists that will allow you to integrate booking functionality for your web visitors, provide that detailed information, and earn income on those bookings.

## Social Media

Your social media content is weighted fairly heavily towards events and specific attractions. Leverage social media niche strategies geared towards the interests and experiences of your market segments.

### Facebook Recommendations

- Have a more regular posting schedule – 2x's a day – and utilize Facebook Insights to suggest optimal times in the AM and PM to best reach your audiences.
- Post user-generated content to showcase visitors' experiences in Lake George and encourage visitors to share content by utilizing designated hashtags.
- Share related articles Lake George is featured on and posts that tag Lake George.
- Utilize a social listening tool such as Hootsuite to monitor keywords such as "Lake George", "Gore Mountain", and "Adirondacks", and respond to inquiries.
- Follow relevant travel bloggers in key niche audiences and interact with their posts. Tag the expert in your own posts. It's likely they'll share or re-tweet it to their own fan base.
- Provide more opportunities for people to get involved and engaged, and help them feel invested.
- Respond to your followers.
- Create multiple variations of the story you want to share. Use different titles and photos, and change up the wording.
- Create more photo albums. Curate images that express your brand and illustrate the different kinds of opportunities available in the county.
- Create Facebook events for key events hosted by towns (that don't already have a Facebook event or another business page).

## Twitter

### Current Status

- Content repurposed from Facebook
- Discusses upcoming events and occasionally posts inspirational content
- Captures on-site, live photos of events and attractions
- Reposts content Lake George is tagged in

### Recommendations

- More regular posting schedule, 4x's a day in the AM and PM (2 posts can be original content repurposed from Facebook and 2 can be shared content mentioning Lake George).
- Post visuals with each Tweet. When posting a link, articles don't automatically appear in Twitter, as they do in Facebook. You have to upload a photo for it to appear.
- Utilize 1-2 industry related/travel hashtags in each post to expand reach.
- Utilize a social listening tool, such as Hootsuite to monitor keywords such as "Lake George" and respond to inquiries.
- Utilize Twitter lists to follow relevant travel bloggers in key niche audiences and interact with their posts. Also create a list of local attractions to monitor posts and re-share with audience.
- Link to your account from your web site!

## Pinterest

- Create and populate designated boards for key area attractions and events.
- Create boards for all seasons.
- Create boards around experiences and itineraries.
- Be sure to include links to your website and Facebook page.
- Utilize keywords and unique descriptions for each photo which drives traffic back to your website.
- Link to your account from your web site!

## Instagram

Instagram is a preferred platform for Millennials and others who sometimes tire of the games, ads, and opinions that can overtake Facebook. Instagram, with its fluidity and visual appeal, is a good place to invite people in to get to know and embrace the Adirondacks.

- Post 3x's a week.
- Capture photos of landscapes and people enjoying the outdoors, cultural and historic sites, and other key activities, events, and assets; help people picture themselves in Warren County.
- Share short (less than 60 second) videos.
- Share content Lake George is tagged in, and use hashtags.
- Link to your account from your web site!

## YouTube

- Create cover photo and profile photo for account, and update seasonally to reflect popular attractions and activities.
- Drive traffic to key videos via Facebook, Instagram and Pinterest.
- Produce short videos to showcase key assets in various categories: outdoor, family fun, culinary and craft beverage. The focus should center around a visitor's experience from their point of view.
- Utilize keywords in descriptions, tags, and add call to action at end of description linking back to website.

## Advertising

The advertising samples we have are primarily focused on the summer season, and the family vacation. Once you walk through the steps we recommend above under Marketing Strategy Review & Recommendations, apply that insight and strategy to your creative development.

- Create more video content, and drive people to it!
- Create itineraries, tours, seasonal adventures, and drive people to those landing pages.
- Target your creative to your market segments.
- Create a co-operative advertising program that your partners can buy into. Give them an opportunity to participate in media buys, sponsored content or digital ads on your web site, featured listings, your e-newsletter, audio/video tours, and/or blog. Co-operative advertising also tells the story of all there is to do in one destination!

## Collateral

The simplest way we can say this is, Less is More! During our visits and intake we collected quite a stash of brochures, small guides, and pamphlets, each produced by individual townships, various chambers, and business associations. At the Visitor Center on Route 9 in the outlets, each township is represented, each with its own brochures and rack cards. While this commitment to promotion is commendable, it is not cost efficient or the best way to promote the county. From a visitor's standpoint, it is confusing and even overwhelming. From a county branding perspective, your message and identity is diffused and fragmented. Instead, we recommend:

- consolidating the monies spent on individual brochures and rack cards and retaining those funds within WCT's budget for collateral and marketing, and
- directing those funds to the production of experience-oriented, cross-county promotional guides, slide shows, and digital/interactive displays that will better tell the story of the breath of experiences available for the traveler in Warren County.

## Media Review and Recommendations

We have reviewed your current contracts and have some recommendations for best value for your budget.

We see a high percentage dedicated to Broadcast (80% of overall budget). We also see some digital exposure via a few multi-media buys and a social/digital contract, but we recommend more targeted digital campaigns to drive marketing objectives for specific market segments and extended season initiatives.

While broadcast media certainly has its place in a well integrated program, we recommend restructuring your media plan to include more digital, video, paid social, and highly targeted digital TV and Select RFI ads which allow you to drill down to consumer segments on a very granular level.

In addition, opportunity exists in leveraging storytelling across rich media, sponsored content, webmail takeovers, video, digital radio, and new audio capabilities on the I Love NY app (perfect for audio walking and driving tours and short audio/video itineraries).

Since both your inhouse visitor survey and the visitor survey we conducted indicates that most of your current and prospective visitors hear about you from Friends and Family and through Internet Search, then using the digital and social tactics above should be a critical component of your integrated media plan, to drive that ever impactful and viral Word-of-Mouth.

People are conducting internet searches because they have heard of the Adirondacks or Lake George in some way; your 2015 Google Analytics indicate that over 66% of your web sessions come through organic Google or Yahoo search. What they find once they reach your web site must tell your story and drive better engagement (lower bounce rates and higher Pages/Session and Session Duration).

A highly critical point to remember is that Warren County does not have just one target audience per season. You have several, and the details of your seasonal buy and advertising content should reflect the characteristics, interests, and nuances of your audience segments, and what you want them to do. We recommend taking a systemic planning approach to first defining market segments and mapping out their decision making cycle before selecting media, rather than planning solely by season.

Digital is a MUST for attracting Millennials.

International media opportunities and dedicated web content will help you better reach key foreign audiences.

## Tactical Recommendations

- Obtain visitor tracking from your parks and events. The people who are coming to the mountain bike trails or marinas may be entirely different than those attending the Adirondack Balloon Fest, Americade, or LAREC Fall Festival. Get as much data on who, why, and from where people are coming to the county. Drill down into your segments. Convert data into actionable strategy for media and messaging.
- Consolidate branding across the county as much as possible.
  - ◇ Bring Visitor Centers under umbrella and direction of the Tourism Department, so that messaging and tourism materials are consistent from Visitor Center to Visitor Center
  - ◇ Rather than each township producing its own marketing materials and brochures – confusing and overwhelming to visitors, and even counter-productive to the purpose of attracting, guiding, and informing them – pool those resources, and have the Tourism Department produce marketing materials that promote the various authentic Adirondack experiences available to travelers throughout the county, all of which sum up and support the overall Lake George Area/Adirondack brand. Individually focused tourism materials and marketing, though perhaps perceived as being helpful to each township, inevitably dissipates the focus and effect of the county’s marketing efforts.
  - ◇ Expand current large draw festivals into extended events by adding complementary and like-themed components.
- Make online purchasing of vacations easier. Third party software can be installed on your web site to facilitate vacation reservations. Some charge only a 5 percent commission on sales and no setup fee or monthly subscription, with half of that commission able to come back to WCT. This would certainly help Warren County ‘sell’ experiences and packages, and add to your mobile experience.
- Really work your emarketing/automated marketing. Engage your audiences in a fun and loving way. Use dynamic forms, surveys, and web/social/emarketing interaction to drive the creation of segmented lists.
- Push the seasons out. Add events in Fall and early Spring to create a program for your shoulder seasons and increase weekend traffic during your slower months. If Warren County is able to extend its shoulder seasons, then it will extend employment, and make progress towards being a year-round destination.
- EMPHASIS has to be on Increasing visitation and occupancy across the seasons, and among your primary and niche audiences. Celebrate the uniqueness and variety of your lodging properties – from cabins to glamping to the Sagamore to a castle on the lake.
- Develop an Adirondack Travel Passbook program, whereby visitors collect stamps or patches for the various places they visit as they utilize your itineraries and packages. Get people traveling around the county!
- Work with the CVB and provide greater funding to develop tactics for gaining increased meeting and convention events. Leverage the 25,000 square feet of new meeting and convention space afforded by the new Marriott.
  - ◇ Efforts to attract groups and large events are partially constrained by lack of Convention Center.
  - ◇ Encourage people to consider Warren County as a place to work and do business, as well as visit.

## Leverage Automated Marketing

Make the most of your extensive consumer list and web engagement, and begin to create segmented lists, dynamic e-marketing, and automated, yet personalized, communications.

Marketing Automation will help you:

- Increase lead generation through multiple channels (email, website, social, Adwords, digital advertising, and blogging)
- Increase conversions
- Segment, personalize and streamline digital communications for even greater ROI

Marketing Automation allows you to “close the loop” – using web engagement and audience characteristics to build emarketing programs that make sure your audiences get the right communication at the right time.

Utilizing reverse IP lookup, lead tracking, lead scoring, dynamic lists, and behavioral-based drip email automation, Warren County will be able to develop insights into individual customers, customer segments, and media channels, and then take action on those insights in the form of personalized communications and dynamic content, delivering customized marketing experiences at different stages of the decision-making cycle.

This capability is HUGE, allowing WCT to market to both the business owner and leisure traveler in a very personalized and efficient manner, shortening the conversion process.

[Personalized emails generate up to 6 times higher revenue per email than do non-personalized emails.](#) (SOURCE : Experian Marketing Services, 2013 Email Market Study, Dec 2013)

## Metrics

Marketing Automation’s Advanced Analytics measure everything — web visits, pages visited, length of stay, keywords, referral sources (including search engines, social media sites, digital advertising, etc), landing pages, activity based on email campaigns, and more.

WCT will also be able to evaluate the effectiveness of your advertising and marketing initiatives based on specific performance indicators, including tracking lead generation, campaign performance, web metrics, conversions, visitation, visitor behavior, and inquiries. We can help you match and continue your current metrics, and most likely recommend and provide new processes and metrics by which to measure progress and success.

## Reporting

The Automated Marketing program also generate a variety of monthly reports, including:

- Which social media platforms are referring the most traffic to your website
- Which social media advertising is creating the most clicks and activity on your website, and the overall ROI of your social media marketing
- How visitors are interacting with your social media posts
- Visitor segmentation based on their interests and social media behavior
- Which social media channels are driving the most viable leads
- What social media platform has the highest click rate through your social media icon links through emails, Newsletters, or Advertisements

## Opportunities for Marketing Collaboration – Fostering Greater Connectivity

- Weave together similar attractions and events into a more holistic offering. For example:
  - ◇ Glens Falls is working to package cultural attractions into an art trail. How can this be packaged with dining options and promoted to weekenders, Millennials, the cultural and foodie tourists, etc.?
  - ◇ Link all the Summer Concert series occurring throughout the summer and across the county, and promote the whole as a comprehensive, long-running event, with its own presence on the county web site and on social media. Rather than appearing as a series of separate listings on the web site or a string of posts on Facebook, how about bundling the events on web and Facebook landing pages dedicated to the concerts, with highlights of each week's performers? Make it **easy** for visitors to find and attend various concerts during their stay.
- Expand Winter festivities – hold an Ice Festival as an example. Package smaller events together, especially in the shoulder seasons.
- Increase collective collaboration between the tourism department, CVB, and private enterprises; streamlining and consolidating marketing efforts and branding.
- Increase collaboration with peer destinations – Saratoga and Albany.
  - ◇ Host Fam Tours
  - ◇ Build Packages
  - ◇ Create regional effort
- Create packages, driving tours, and itineraries built around interests and experiences. Help visitors link where they may be staying with all the other assets of the county. Think experientially, by market segment, and regionally. Put yourselves in the shoes of the different market groups you have and want to attract, and promote and build what they will need to know in order to explore and find their way around the county.
- Rather than disbursing additional funding to the municipalities in order to reduce the amount of money in the Occupancy Tax Reserve Fund, apply those funds instead to specific county-wide marketing initiatives that would serve the broader purpose and drive defined marketing objectives, and/or staff positions needed. The Tourism Department should have the responsibility and authority to designate those objectives, plan specific strategies for meeting those objectives, and allocate budget dollars accordingly.

## Community Partner Comments and Suggestions

- Lake George has been talking about wanting to be year-round destination. . . but now has Marriott to help it be. 'Substance' of tourism needs to be worked on. Need to pull from within, and identify what are the strengths of Warren County. Glens Falls is not well situated within current campaign. County needs consistent campaign. Present assets in an organized and energized manner. Get beyond the surface of the County, get to the good bones of the County – all the other activities.
- Visitors don't see beyond just the Lake and Village, outlets, maybe Great Escape. Need to expand brand to include great dining, etc.
- Amazing golf destination for shoulder seasons. 26 Incredible courses in county. Lake Placid does a ton of business with golf outings. Golf assets just need to be promoted and perhaps packaged
- Do all the Visitor Centers even have a common theme? Probably not.
- How to create a 'Warren County' basket to compete for visitors and be in the game. What goes in the basket? Foster dialog. Look for collaboration. (Some businesses are more engaged than others). It has been the same for a long time; time to readjust.
- Grant writing for monies to help county's efforts
- There has to be a system for disseminating information. Internet large factor, of course. Traditional media still important. Customer service still important. Human factor still important . . . county should have multiple levels of interface. Personal direct connect.
- No good communication between townships. Not holistic. All little pockets of information. Have to dig and find bigger picture. Way too territorial and divided. Is a waste to be splintered into townships
- Lack of snow a problem in winter. But far more four-wheelers than snow mobilers. Don't have trails for four-wheelers. Is that a market for Warren County? Market analysis needed.