

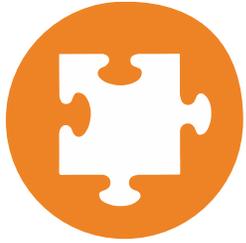


Strategic Tourism Consulting Report

Prepared for
Warren County

BBG&G Advertising, Inc.

- Destination marketing and strategic planning
- Communities, regions, and counties
- Regional and national research data and analysis
- Thought leadership
- Listening to travelers and stakeholders
- Full marketing tactical planning and media strategies
- Automated Marketing programs
- Creative implementation



Study Purpose

IDENTIFY Opportunities to strengthen your brand

- Assess the tourism products that the county's communities offer
- Identify unique challenges and strategies specific to each community's needs and how they match visitor profiles
- Identify products that contribute to the tourism economy
- Review tourism infrastructure, operations, and trends
- Assess how industry resources are used – marketing strategies, media channels, collaborations and allocations – to increase visitation and drive economic impact

Why is Tourism Important to Warren County?

Tourism is a \$1.3 billion industry in the Adirondacks.

- In Warren County alone, Visitor Spend is at \$570,886,400.
- 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).



Branding Warren County



Hub & Spoke Destination: A destination that has a central community, but relies on “**spoke**” activities and attractions in surrounding areas to complete the tourism experience.

AND

Area Destination: A group of communities that is brandable for tourism attraction and development. Often an area based on a cluster of recreational activities associated with a geographic feature or a “trail” of connected thematic attractions.



Warren County Study Methodology

- Four Site Visits and Meetings – toured the area, gained market knowledge first hand and met travel industry leaders and partners
- Met with Warren County Tourism staff and Advisory Board members
- One-on-one interviews conducted in person and over the phone with multiple community stakeholders, business owners, and lodging owners
- Implemented four online surveys: Community Partner, Lodging, Sites and Attractions, and Visitor Profile
- One-on-one interviews with key peers, including ROOST, Saratoga, and Saratoga Springs
- Reviewed 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

Warren County Lodging Market Survey

- Survey of the hotel/motel/inn/B&B properties located in the county
- The lodging survey was conducted during the months of July through October 2016.
- Questionnaire was sent to the lodging property database provided by WCT to estimate the following for the full calendar year 2015:
 - percentage of occupancy driven by 9 market segments
 - Top leisure feeder cities
 - Percentage of adult-only vs. family travel parties.
 - Annual occupancy percentages
 - ADR (average daily rates) and RevPAR (revenue-per-available-room).
- Smith Travel Research (STR) data analysis

5-year Monthly Occupancy (%) – STR Report

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec
2009	30.0	38.1	34.5	34.7	43.9	55.7	65.9	78.0	56.6	50.2	29.8	24.1
2010	29.2	38.3	33.7	32.4	43.1	60.0	75.5	83.1	59.4	53.3	33.4	30.4
2011	32.9	41.9	36.0	39.1	45.2	59.9	75.3	81.1	58.1	51.1	33.0	31.7
2012	32.3	40.3	39.4	38.5	45.4	61.7	74.4	82.8	55.1	48.5	32.0	32.3
2013	32.9	38.0	40.0	34.7	44.0	56.5	73.4	82.9	52.7	49.1	32.2	29.1
2014	28.1	36.3	34.1	39.0	47.1	58.0	75.7	85.1	53.6	49.3	30.5	32.0
2015	32.2	39.4	35.9	38.7	48.0	61.9	74.2	79.2	58.0	53.2	33.2	29.1
2016	30.5	36.3	33.0	39.6	47.8	61.0	74.9	77.6	59.9			
Avg	31.0	38.6	35.8	37.1	45.6	59.3	73.7	81.2	56.7	50.7	32.0	29.8

Occupancy (%) by Day of Week – STR Report

	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
Aug - 15	64.1	71.5	79.0	82.1	81.0	87.1	92.4
Sep - 15	48.0	41.8	48.4	52.9	54.6	76.5	87.7
Oct - 15	43.2	44.9	47.4	47.6	45.7	63.0	74.7
Nov - 15	17.1	26.1	31.3	33.9	38.3	46.6	45.1
Dec - 15	20.5	26.4	25.6	26.1	31.2	34.0	41.4
Jan - 16	19.6	21.5	23.5	23.3	23.9	44.4	51.4
Feb - 16	28.9	26.0	27.6	27.9	29.5	52.6	63.7
Mar - 16	20.5	27.7	29.7	27.8	30.4	45.6	51.3
Apr - 16	24.7	33.6	39.0	37.6	35.2	47.2	54.5
May - 16	40.2	37.7	44.1	42.9	40.4	61.1	73.8
Jun - 16	43.0	55.9	60.2	58.7	59.8	71.5	78.8
Jul - 16	65.1	66.9	70.7	72.4	72.8	82.7	90.3
Total Year	40.8	43.8	47.4	48.5	48.9	63.3	71.9

5-year Average Daily Rate - ADR (\$) – STR Report

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec
2009	102.56	110.97	97.15	96.75	102.12	119.69	146.31	155.87	121.29	106.55	97.71	105.00
2010	98.93	111.23	91.94	83.09	102.08	120.64	152.99	160.21	124.30	107.83	91.49	107.82
2011	102.70	107.22	93.21	85.42	103.30	128.14	159.27	165.80	126.29	108.85	98.95	112.33
2012	104.48	118.46	108.47	102.63	109.00	135.02	164.35	174.25	129.80	112.13	101.97	115.26
2013	106.97	122.56	117.13	103.31	113.18	137.28	173.32	183.73	127.52	113.62	104.61	117.93
2014	110.78	126.76	112.42	104.88	116.34	136.32	180.79	192.43	128.53	116.87	104.28	121.53
2015	117.01	129.78	114.24	112.34	121.12	139.52	182.33	195.52	138.24	121.11	103.64	121.93
2016	112.04	126.96	110.88	108.19	122.42	145.43	196.23	198.16	147.34			
Avg	106.79	118.91	105.83	99.87	111.37	132.85	169.68	178.25	130.41	112.43	100.35	114.67

5-year Revenue Per Available Room - RevPAR (\$)

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec
2009	30.77	42.28	33.52	33.54	44.86	66.66	96.34	121.55	68.68	53.49	29.11	25.35
2010	28.87	42.60	31.01	26.92	44.04	72.39	115.51	133.10	73.79	57.48	30.54	32.79
2011	33.76	44.91	33.58	33.41	46.71	76.73	119.90	134.50	73.35	55.58	32.69	35.66
2012	33.73	47.72	42.76	39.56	49.44	83.37	122.24	144.32	71.51	54.42	32.63	37.28
2013	35.21	46.53	46.81	35.90	49.78	77.58	127.14	152.35	67.20	55.84	33.63	34.37
2014	31.16	46.00	38.32	40.87	54.80	79.02	136.91	163.80	68.86	57.63	31.75	38.88
2015	37.73	51.17	41.04	43.43	58.18	86.41	135.36	154.94	80.23	64.43	34.44	35.52
2016	34.19	46.12	36.55	42.88	58.55	88.73	147.02	153.74	88.30			
Avg	33.09	45.87	37.91	37.03	50.74	78.83	124.98	144.79	73.99	56.98	32.11	34.15

5-year Supply

(The number of rooms times the number of days in the period)

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec
2009	120,311	99,316	109,957	121,920	202,337	198,780	206,398	206,398	197,940	180,482	120,360	117,025
2010	117,025	108,500	118,575	127,350	204,414	200,490	207,173	207,235	198,750	181,319	115,950	110,484
2011	110,484	101,304	112,158	124,140	200,787	200,250	206,863	206,708	198,240	180,792	115,560	110,081
2012	110,081	100,940	111,755	123,780	200,632	200,100	206,770	206,770	198,360	180,916	118,260	110,112
2013	110,081	103,404	114,483	123,840	200,570	200,040	206,708	206,708	198,240	180,792	115,530	110,050
2014	110,050	100,912	111,724	123,750	200,601	200,070	206,739	206,739	198,270	180,823	118,170	105,152
2015	105,152	96,488	106,826	123,750	197,749	197,310	203,887	202,647	194,310	180,947	118,590	108,314
2016	108,314	99,344	112,716	123,750	196,509	196,260	202,802	206,491	198,030			
Avg	111,437	101,276	112,274	124,035	200,450	199,163	205,918	206,212	197,768	180,867	117,489	110,174

5-year Demand (Rooms Sold)

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec
2009	36,097	37,843	37,941	42,263	88,892	110,711	135,914	160,943	112,082	90,612	35,853	28,260
2010	34,145	41,559	39,995	41,261	88,199	120,298	156,417	172,167	117,985	96,649	38,709	33,603
2011	36,316	42,434	40,405	48,548	90,798	119,904	155,725	167,681	115,141	92,314	38,181	34,943
2012	35,538	40,664	44,055	47,712	90,999	123,552	153,784	171,255	109,276	87,799	37,848	35,613
2013	36,235	39,259	45,753	43,032	88,214	113,054	151,623	171,402	104,463	88,851	37,145	32,074
2014	30,951	36,621	38,084	48,229	94,495	115,981	156,557	175,983	106,226	89,169	35,985	33,640
2015	33,907	38,045	38,378	47,834	94,987	122,204	151,372	160,587	112,766	96,267	39,412	31,551
2016	33,058	36,090	37,158	49,046	93,988	119,745	151,949	160,209	118,685			
Avg	34,531	39,064	40,221	45,991	91,322	118,181	151,663	167,528	112,078	91,666	37,590	32,812

Lodging Survey – 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, these are averages from a small pool of respondents. Travel party composition varies by lodging type. Hotels/motels reported about 10-50% adults only; inns were weighted 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.

Lodging Survey – Lodging Market Segmentation

Percent	Category
	Leisure
44%	Tourists visiting Local Sites and Attractions
26%	Recreational Outdoor Activities
15%	Family Events
7%	Visiting local friends and family
8%	Transit (passing through)
	Group
4%	Conference/meeting/groups
6%	Weddings
2%	Group Tour
5%	Business

Warren County Visitor Survey

- Survey of visitor inquirers provided by Warren County.
- The online survey was conducted during the months of July through October 2016.
- Questionnaire was sent to the inquirer database provided by WCT to document the profile and planning preferences of those who visit Warren County:
 - the perceptions of Warren County as a destination
 - attractors that induce overnight visitors and repeat visitors
 - percentage of adult-only vs. family travel parties.

Visitor Profile – Demographics

Average Age	Female	51
	Male	56
Level of Education	Graduate School	19%
	College Degree	38.28%
	Some College	23.39%
	High School Graduate	13.75%
Occupation	Retired	22.54%
	Professional/technical	10.70%
	Healthcare industry	9.65%
	Secretary/clerk/office	7.98%
	Teacher/professor/education	7.74%
	Executive/manager	6.59%
	Self-employed	5.59%
	Other	11.99%
Travel Party	Adults only	61.21%
	Adults traveling with kids	38.79%

Visitor Profile – Respondents

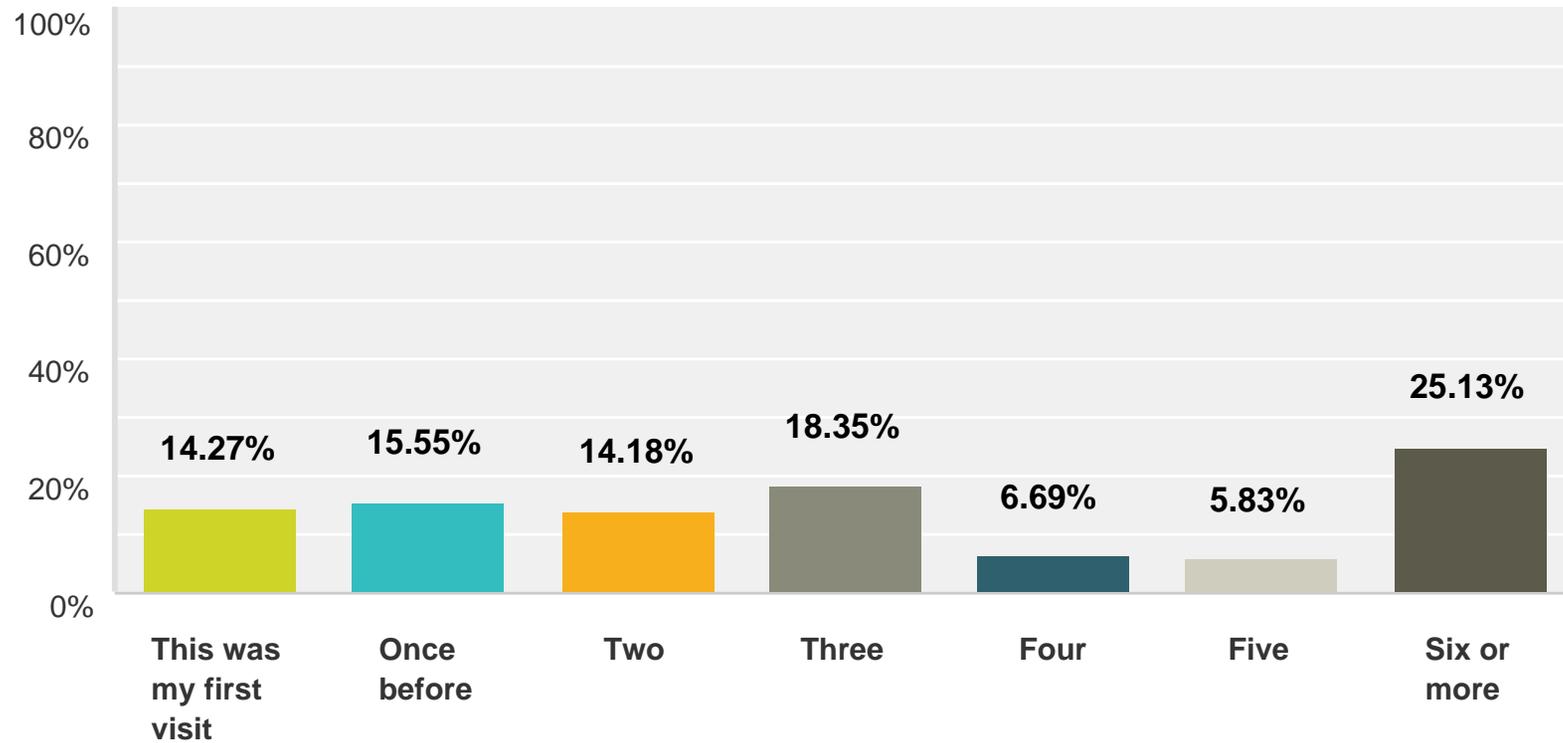
Answer Choices	Responses	
I am/was a visitor to Warren County/The Lake George Area	75.11%	2,215
I am a year-round resident of Warren County/The Lake George Area	3.19%	94
I am a part-time resident of Warren County/The Lake George Area (live or visit part of the year)	2.54%	75
I am a year-round resident 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
Total		2,949

Respondents were primarily overnight visitors (78%) versus day-trippers (22%).

Visitor Profile – How did you hear about Warren County?

Plan to Visit	Have Visited	Method
34.86%	42.29%	Friends/family referral
31.80%	19.24%	Internet search
26.91%	66.23%	Previous knowledge
16.82%	12.67%	NY State Travel Guide
12.54%	15.51%	Visit Adirondacks brochure
7.95%	3.77%	Magazine ad
7.03%	4.80%	TV ad
6.42%	4.38%	AAA/Fodors/Zagat type guidebooks
3.67%	10.85%	Warren County Travel Guide
3.06%	5.96%	Warren County Brochure
2.75%	3.31%	Print ad

Visitor Profile – 1st Time vs Repeat Visitation



Visitor Profile – Primary Destination

Answer Choices	Responses	
Lake George	65.60%	1,207
Bolton Landing	5.92%	109
Adirondack	4.67%	86
Queensbury	3.91%	72
Other (please specify)	3.10%	57
Diamond Point	3.04%	56
Glens Falls	2.93%	54
Warrensburg	2.77%	51
Lake Luzerne	1.96%	36
Chestertown	1.41%	26
North Creek	1.03%	19
Hague	0.98%	18
Brant Lake	0.87%	16
Stony Creek	0.49%	9
Silver Bay	0.38%	7
North River	0.27%	5
Pottersville	0.22%	4
Johnsburg	0.16%	3
Thurman	0.16%	3
Athol	0.05%	1
Bakers Mills	0.05%	1
Total		1,840

Visitor Profile – Trip Purpose

Plan to Visit	Have Visited	Category
90.52%	86.86%	Leisure (visited local sites and attractions, shopping, culinary, winery, etc.)
6.12%	8.97%	Family Related (visited local friends and family, attended family event, graduation, etc.)
0.92%	1.57%	Team sports event / tournament (recreation, children & adult leagues, etc.)
1.22%	.56%	Group Tour/Motorcoach
0.31%	1.02%	Conference/Meeting
0.92%	1.02%	Business

Visitor Profile – Leisure Trip Purpose

Plan to Visit	Have Visited	Category
46.18%	40.69%	General relaxation
17.13%	17.46%	Outdoor recreation (biking, hiking, fishing, boating, etc.)
5.81%	12.01%	Other
3.06%	6.70%	Visiting friends and relatives
4.89%	6.05%	Overnight as part of longer trip – passing through
1.53%	5.31%	Attended a festival / event / concert
2.75%	4.89%	Shopping
11.62%	3.68%	Historic sites / museums
0	1.02%	Reunion / wedding
5.50%	.98%	Wineries / Brew Pubs
1.53%	.19%	Arts venues, galleries, studios

Visitor Profile – Visitor Activities

Plan to Visit	Have Visited	Category
49.38%	62.28%	Shopping
58.64%	50.89%	Driving / sightseeing
31.79%	36.04%	Swimming & Water Sports
26.54%	33.77%	Boating & Water Sports
39.51%	28.24%	Fine or local culinary dining
29.01%	24.34%	Sleep late / take a nap
36.73%	21.36%	Antique Shopping
45.37%	20.87%	Historic sites / museums
28.70%	20.38%	Hiking
37.04%	19.19%	State or national park
34.26%	19.08%	Festival / event

Visitor Profile – Visitor Activities

Plan to Visit	Have Visited	Category
35.19%	19.02%	Wineries / Brew Pubs
34.57%	15.23%	Farmers Markets / U-picks
16.67%	13.17%	Fishing
18.52%	12.95%	Camping
3.70%	11.38%	Visited other friends and relatives
16.67%	10.79%	Concert / live performance
18.21%	6.88%	Biking / cycling
23.46%	6.78%	Art venues, galleries, studios
4.01%	6.72%	Golf
2.47%	3.74%	Motorcycle riding

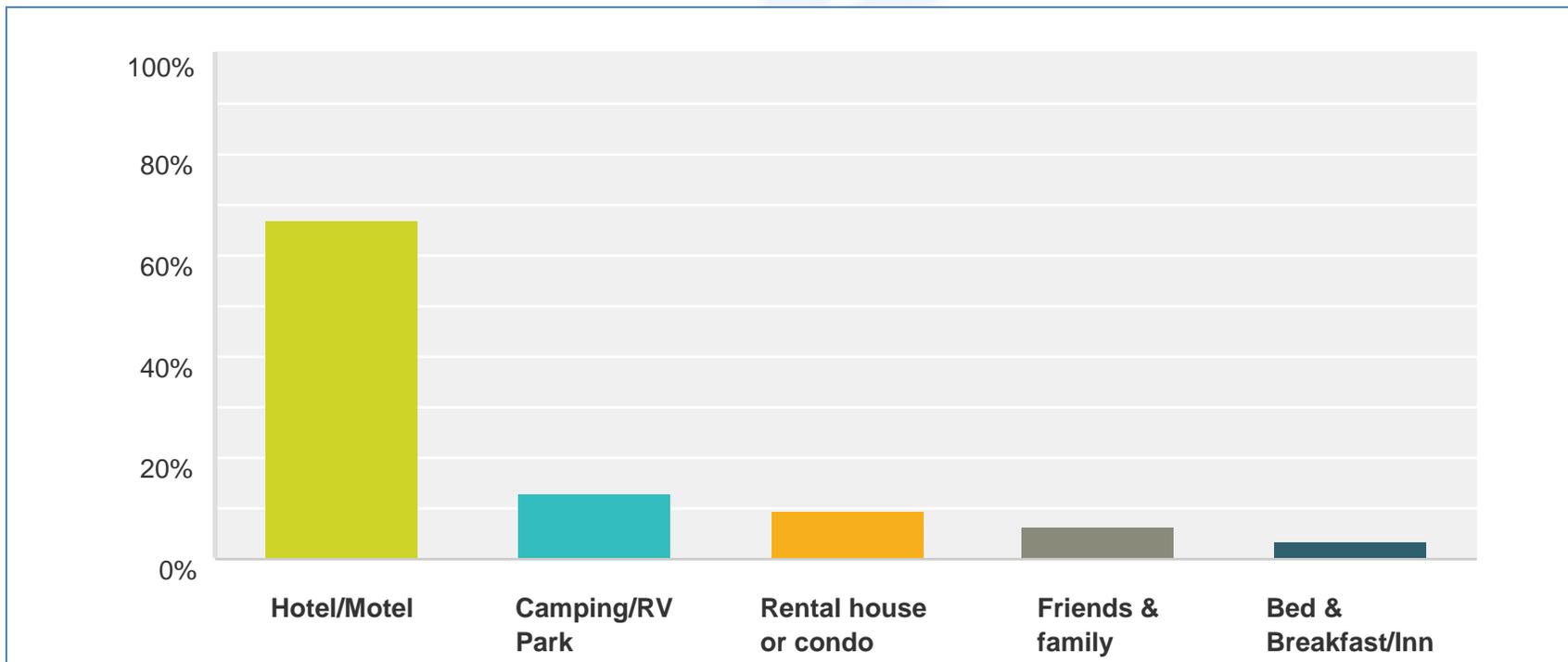
Visitor Profile – Places (Attractions)

Plan to Visit	Have Visited	Category
51.97%	50.60%	Lake George Steamboat Cruises
42.11%	54.22%	Factory Outlets of Lake George
36.84%	10.92%	Natural Stone Bridge & Caves
36.18%	4.09%	Adirondack Wine & Food Festival
33.55%	18.43%	Adirondack Winery
31.25%	7.71%	Adirondack Balloon Festival
30.92%	6.90%	Adirondack Adventures
30.92%	7.71%	Lake George Carriage Rides
29.93%	4.69%	Hudson River Nature Trail
28.62%	32.51%	Fort William Henry Museum

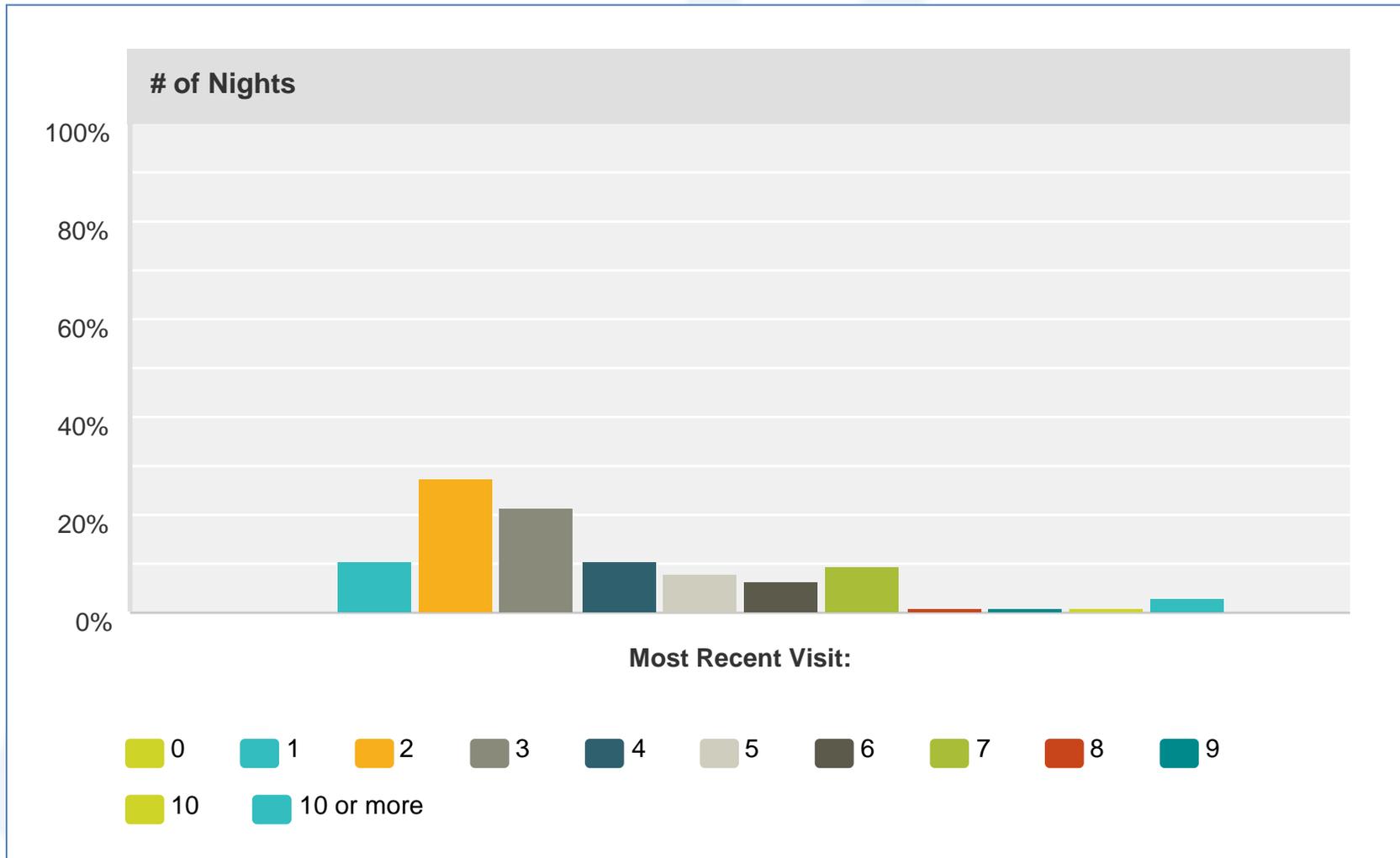
Visitor Profile – Places (Attractions)

Plan to Visit	Have Visited	Category
27.30%	4.02%	Maple Farm
25.00%	29.09%	Great Escape and Splashwater Kingdom Theme Park
24.67%	5.63%	Adirondack Craft Beverage Trail
24.34%	2.82%	Hague Historical Museum
24.01%	8.51%	Glen Drive-In Theater
22.37%	1.34%	Upper Hudson Valley Wine Trail
19.41%	3.15%	Warrensburgh Museum of Local History
18.42%	10.46%	Gore Mountain
18.09%	4.89%	Jazz at the Lake - Lake George Jazz Weekend

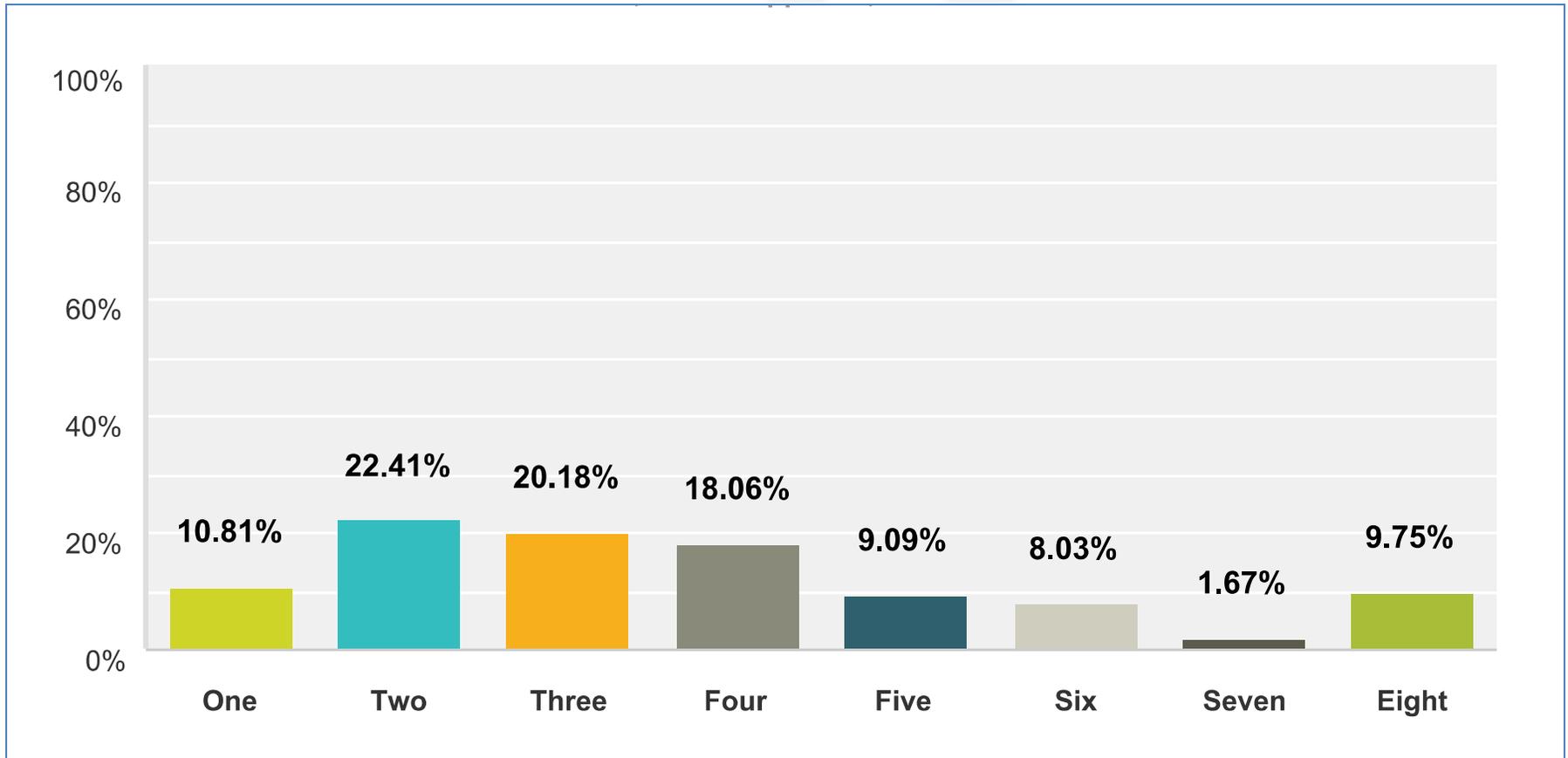
Visitor Profile – Lodging Choices



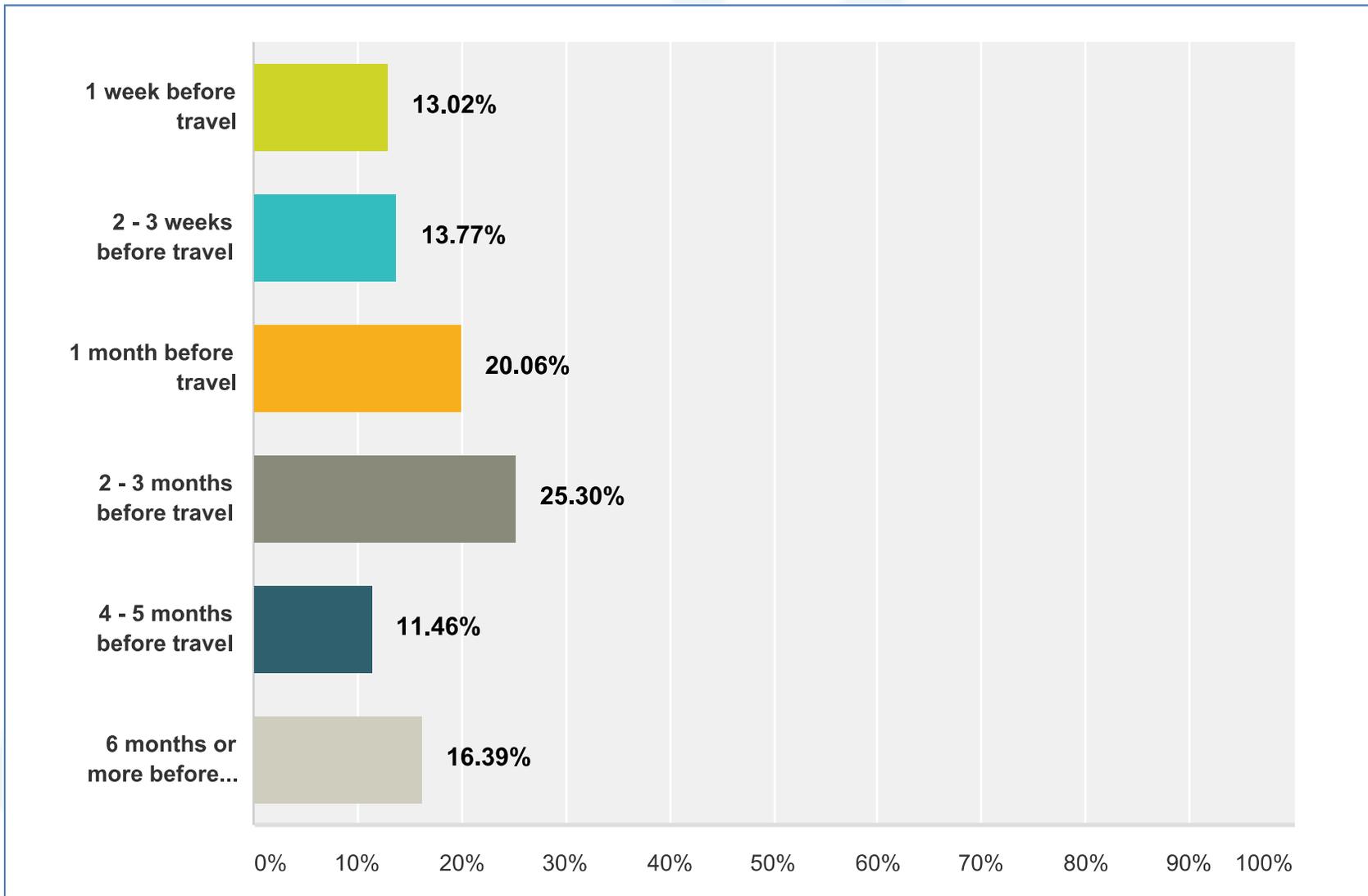
Visitor Profile – Length of Stay



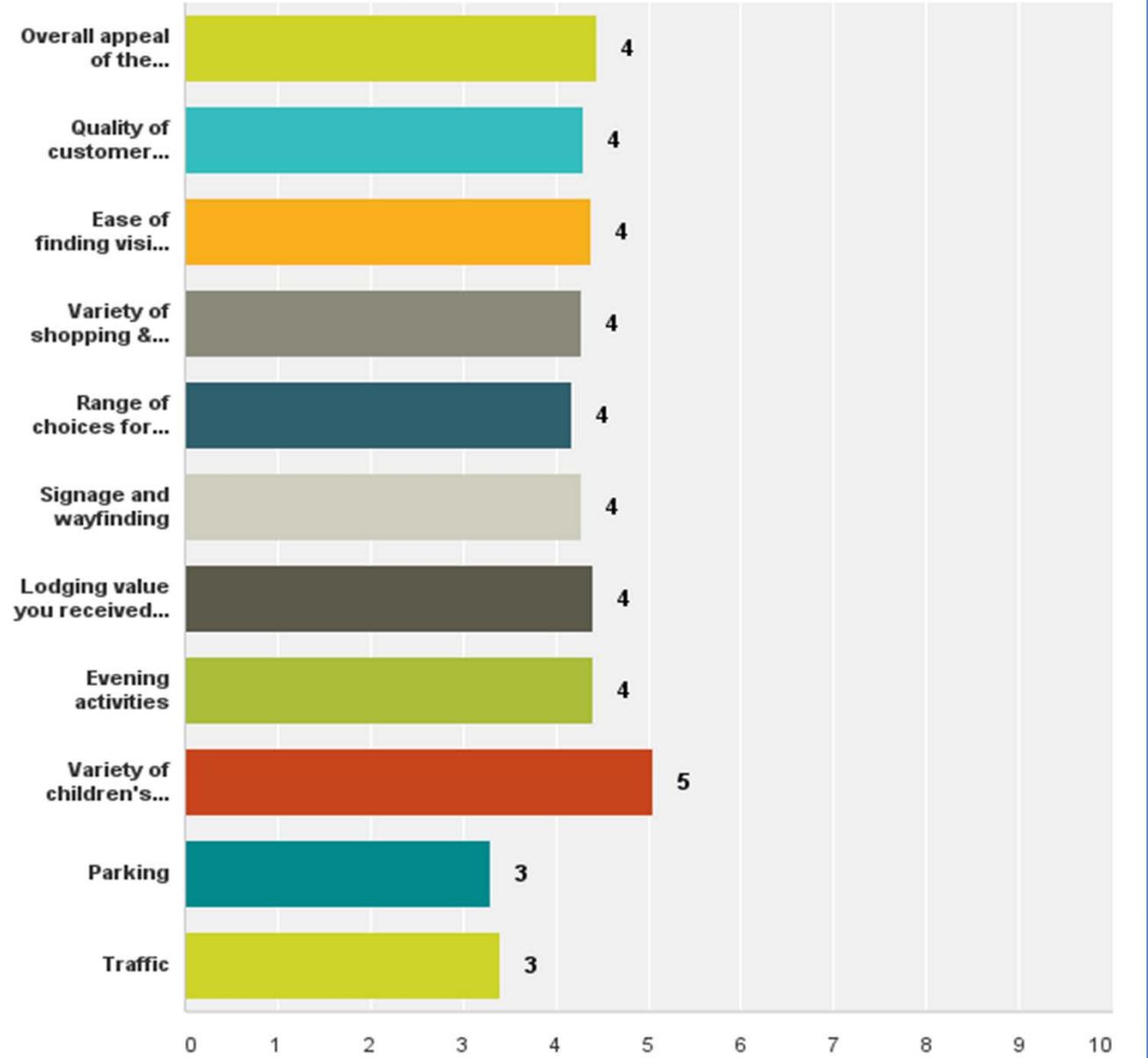
Visitor Profile – Number of Travel Getaways



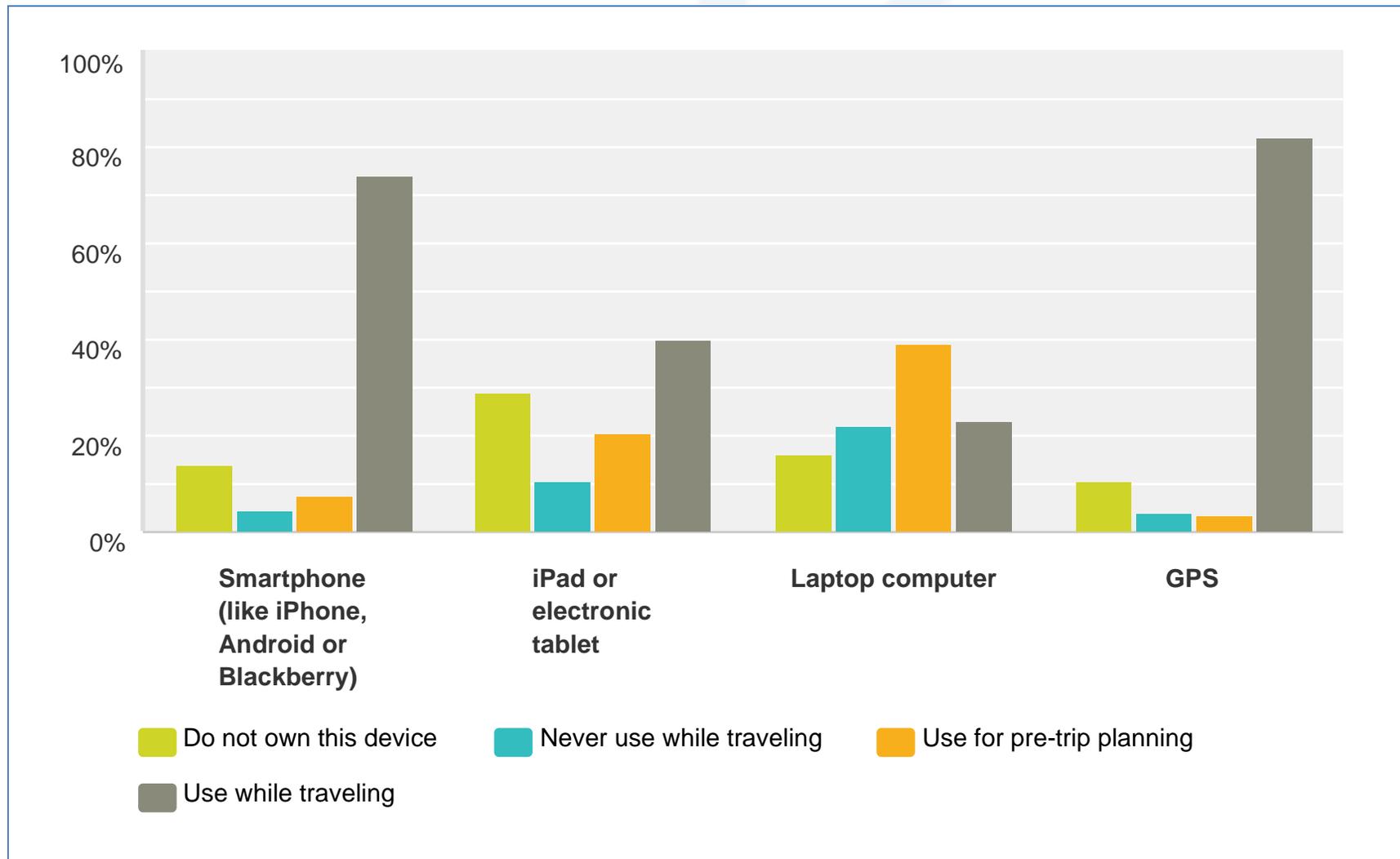
Visitor Profile – Planning Prior to Arrival



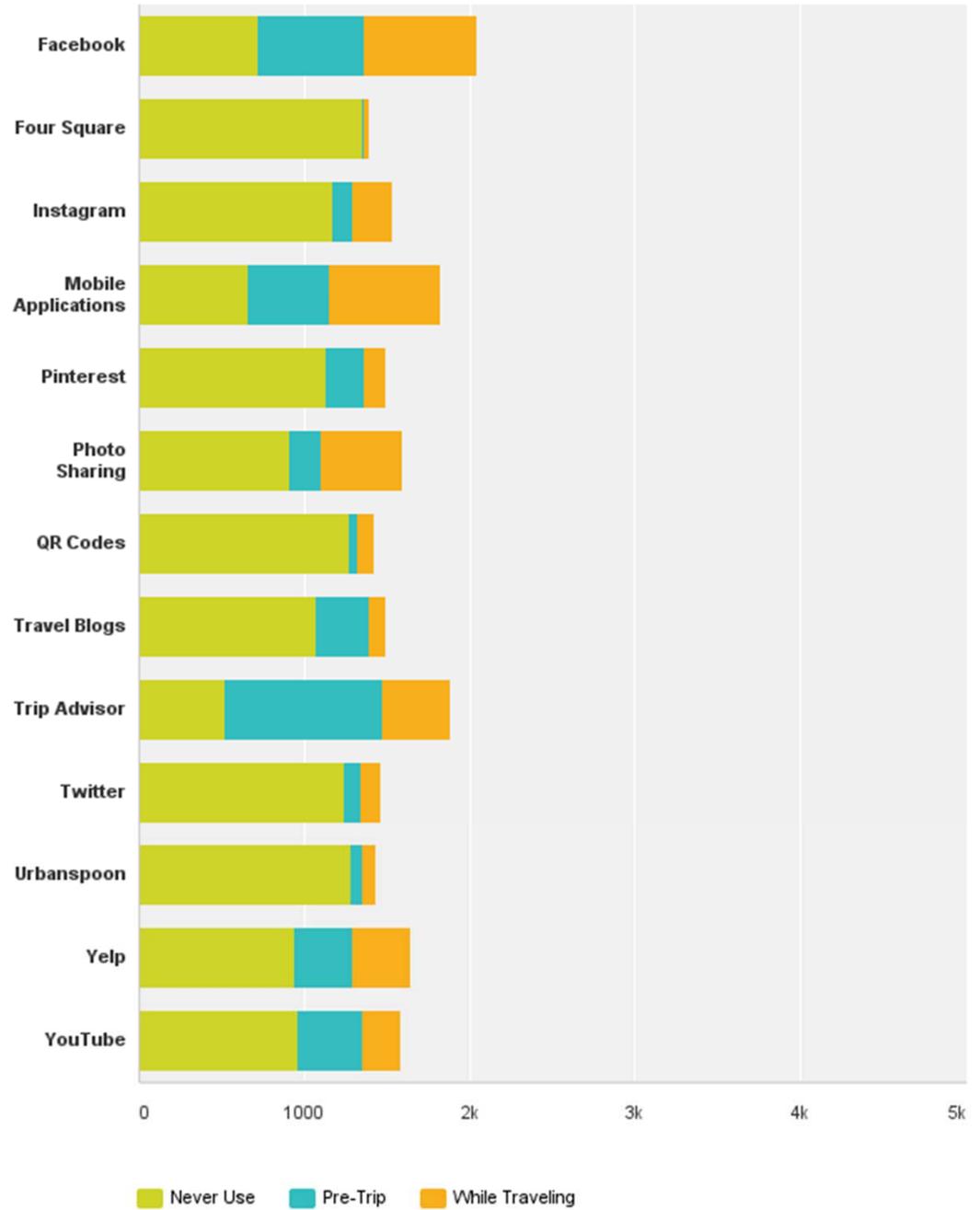
Visitor Profile – Ratings



Visitor Profile – Technology Use



Visitor Profile – Social Media Use



Visitor Profile – Point of Origin

Origin	# of Respondents	Percentage
New York	1106	52%
New Jersey	236	11%
CT	154	7%
Canada	119	6%
PA	105	5%
MA	92	4%
FL	30	1.4%
Mid-West	66	3%
New England	59	2.8%
Mid-Atlantic	43	2%
Western USA	43	2%
Southern USA	41	1.8%
England & Germany	9	.4%

Warren County 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**

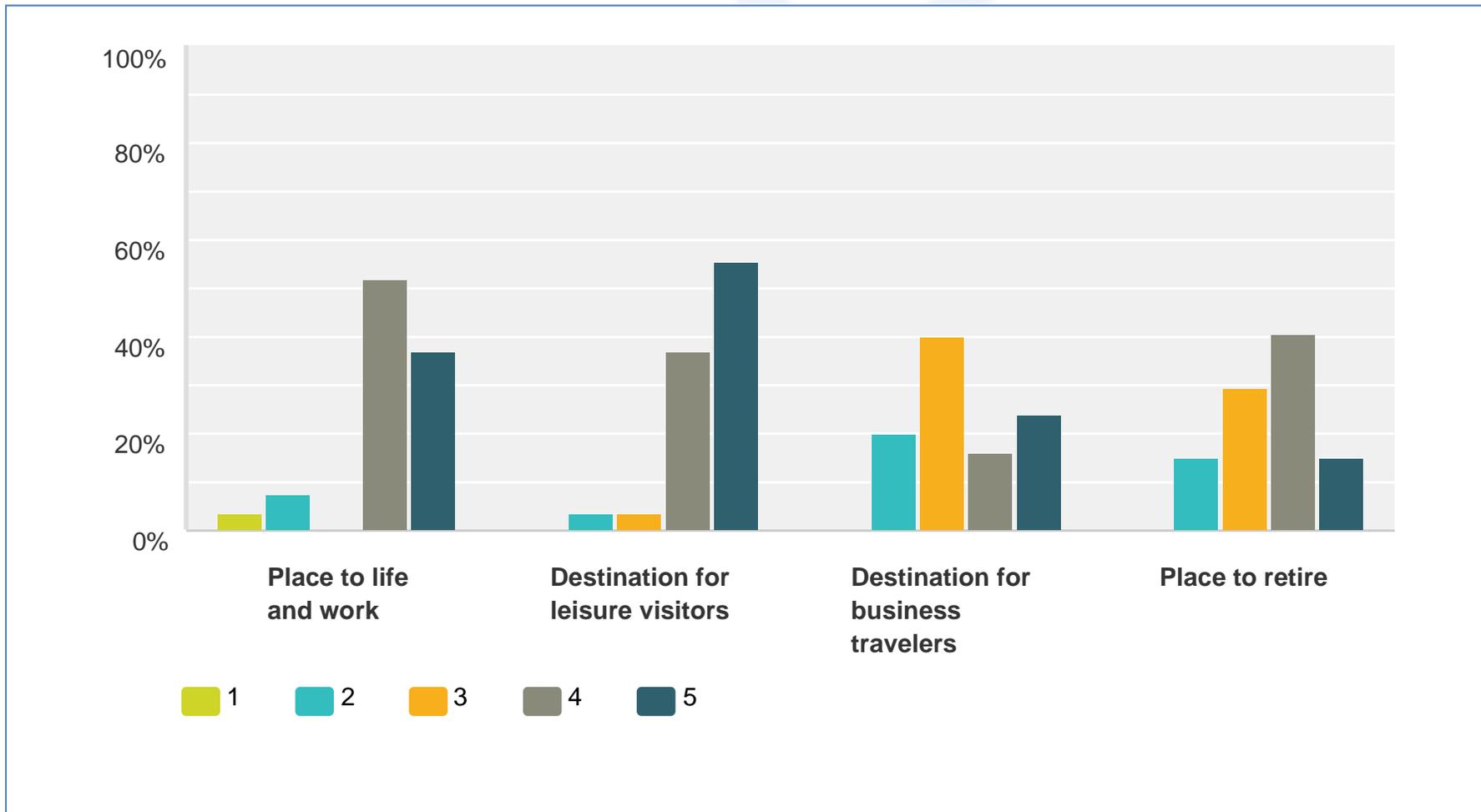
- Over the next decade, Warren County needs to focus on:
 - 1) Enhancing the visitor experience
 - 2) Developing Warren County into a year-round destination
 - 3) Adding new attractions/activities
- New York City, New Jersey, Massachusetts, and Connecticut were identified as the significant regional 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.**

Warren County Sites/Attractions Survey

Primary category of attraction or business

- 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
- Public library
- Outdoors
- 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
- Performing arts
- Agriculture

Current perception of Warren County as a place to live, work, and visit



Peer Comparisons

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	58.8
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	52.6	66.7	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	139.83	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	132.36	145.15	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	96.87	114.85	114.33
2014	143.82	142.32	157.66	154.05	120.04	111.6	96.48	116	117.86
2015	146.21	146.54	160.7	161.21	128.61	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	54.84	50.9	59.11	59.3
2011	67.63	79.48	89.27	77.39	66.43	60.66	52.29	60.99	66.6
2012	70.88	86.49	96.5	78.56	67.48	64.12	54.3	62.66	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

Peer Comparisons

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/Schenectady	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

Peer Comparisons

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.

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	80.0	67.6
2011	38.7	45.9	51.3	58.8	64.3	74.3	79.8	86.7	86.7	80.5
2012	49.7	55.9	59.2	65.1	67.1	77.5	79.3	85.0	85.0	72.2
2013	45.6	51.6	56.4	66.1	67.4	74.6	81.7	87.6	87.6	74.2
2014	47.0	57.0	62.8	68.4	72.6	80.5	82.1	89.7	89.7	77.3
2015	53.7	62.2	67.4	73.0	73.7	79.1	81.0	84.3	84.3	72.6
2016	41.5	50.5	54.7	60.4	67.8	73.9	74.5	81.4	81.4	68.2
Avg	45.2	52.7	57.5	63.8	67.9	75.9	78.7	85.0	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	192.65	125.06
2011	91.29	97.18	97.93	102.00	117.66	121.20	148.23	193.99	193.99	127.93
2012	99.18	103.40	105.96	110.97	127.52	131.54	162.91	206.05	206.05	132.05
2013	104.23	108.84	107.76	115.48	134.22	131.84	171.01	220.03	220.03	135.14
2014	105.64	110.55	110.21	115.87	140.55	140.08	180.58	227.89	227.89	136.17
2015	110.90	116.67	116.97	125.32	141.84	142.18	178.77	234.70	234.70	155.22
2016	109.57	114.41	116.35	126.42	140.80	146.97	186.77	230.09	230.09	149.14
Avg	102.81	107.58	108.51	115.00	132.83	135.10	168.78	215.06	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	154.19	84.58
2011	35.35	44.60	50.19	59.95	75.66	90.02	118.27	168.15	168.15	102.98
2012	49.29	57.78	62.77	72.22	85.55	101.92	129.13	175.22	175.22	95.33
2013	47.56	56.15	60.75	76.34	90.49	98.30	139.70	192.77	192.77	100.26
2014	49.66	63.02	69.25	79.21	102.00	112.79	148.28	204.35	204.35	105.22
2015	59.50	72.56	78.78	91.43	104.54	112.48	144.86	197.79	197.79	112.63
2016	45.50	57.78	63.68	76.30	95.46	108.64	139.20	187.25	187.25	101.77
Avg	46.43	56.72	62.39	73.37	90.15	102.60	132.91	182.82	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	78,833	76,290
2011	74,059	66,892	74,648	75,000	78,833	76,290	78,833	78,833	78,833	76,290
2012	77,283	69,804	77,872	78,060	81,995	79,350	81,995	81,995	81,995	79,350
2013	77,221	69,748	77,810	76,890	80,786	78,180	80,786	80,786	80,786	78,180
2014	77,221	69,748	77,810	76,890	85,746	82,980	85,746	85,746	85,746	82,980
2015	82,181	74,200	87,358	86,130	90,334	90,270	93,589	93,589	93,589	90,570
2016	90,024	81,312	88,350	89,280	93,589	90,570	101,246	104,563	104,563	101,190
Avg	78,868	71,228	79,785	79,607	84,302	81,990	85,861	86,335	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	63,097	51,593
2011	28,680	30,697	38,260	44,081	50,688	56,666	62,902	68,331	68,331	61,413
2012	38,412	39,005	46,134	50,806	55,009	61,482	64,994	69,727	69,727	57,287
2013	35,234	35,982	43,865	50,829	54,465	58,293	65,995	70,774	70,774	58,001
2014	36,299	39,765	48,895	52,561	62,226	66,812	70,408	76,887	76,887	64,117
2015	44,095	46,150	58,839	62,837	66,575	71,415	75,837	78,870	78,870	65,722
2016	37,381	41,064	48,355	53,889	63,450	66,949	75,458	85,093	85,093	69,045
Avg	35,614	37,558	45,874	50,793	57,215	62,265	67,614	73,254	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	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	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	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	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	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	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	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	15,851,847	8,420,183



Peer Comparisons

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 because 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.

Peer Comparisons

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.

Peer Comparisons

Consolidate Your Brand

Upon review of peer data and marketing approach, what stood out the most to us was:

- the dilutive effect on Warren County's brand of so much marketing material produced by individual townships. In contrast, your peers drive their marketing from a centralized entity, and
- townships do not receive funding to produce their own marketing material, resulting in a stronger, more consistent brand.

We recommend that:

- dollars for marketing material should be retained within the Tourism Department budget, for development of brand-consistent, county-wide material, guided and informed by the county's overall marketing plan.
- 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.

Peer Comparisons

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.
- Add a dedicated Event Planner to the team.

Peer Comparisons

Update the Tourism Budget Allocation process

- The Warren County Tourism Department should be given the authority to 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.
- Occupancy tax must be used for marketing and promoting tourism. 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, extended seasonality, and increases in sales and occupancy tax revenues.
- Supported events and funding should represent best value for investment, have metrics to prove ROI.

Operational Review

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

- Expand the current focus on Lake George by creating itineraries and packages that promote the anchor assets within the county. Showcase these assets as experiences within and part of the larger brand.
- Remove the emphasis on townships. Instead package 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
 - Luxury Travel

Operational Review

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
- 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.

Market Strategy

- Reposition Lake George and the surrounding areas as a multiple season destination to those who may not have otherwise considered it.
- Plan for desired audiences and bundle assets into itineraries, travel tours, and packages and promote early on.
- Plan marketing strategies and events geared to important market segments.
 - Millennials
 - International Tourists
- Use social/digital media to gain better penetration into NYC metro market.
- Leverage co-op advertising.
- PR – expand your outreach to travel media to drive more media visits, Fam Tours, and editorial exposure.

Travel Industry Strategy

- Overnight visitation is critical for spending – far more visitors stay overnight than make day trips, and 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%. Autumn months also offer opportunity for ROI from marketing investments.
- 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.

Travel Industry Strategy

- Emphasize unique shopping and fresh, local unique dining –Warren County is the ideal authentic Adirondack destination where travelers can also buy unique food and gift items to take home.
- Expand the brand – travelers to Warren County are seeking unique experiences in settings that provide lasting memories. Better convey your multi-faceted travel experience – driving longer lengths of stay with increased engagement.
- Target the three to five hour drive market.
- International visitors – Warren County is in close proximity to the most popular international destination in America (NYC) and should therefore market to inbound foreign travelers. Priorities are Canada, UK, and Germany.

Foster Greater Connectivity

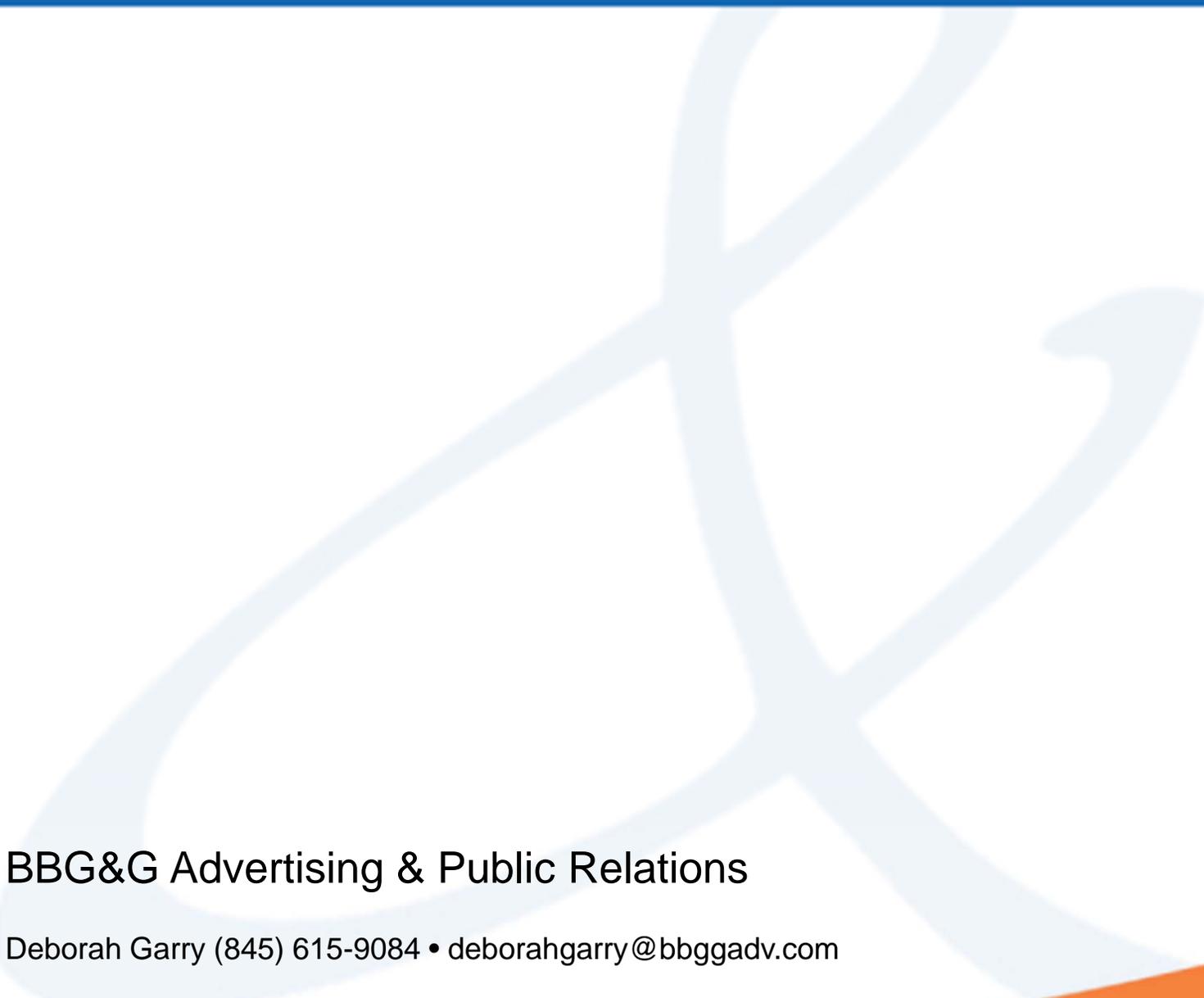
- Weave together similar attractions and events into more holistic offerings.
- Connect the cultural and dining experiences to your leisure outdoor experiences
- Add a booking engine to the WCT web site.
- Focus on connectivity and wayfinding – Warren County is quite large and has multiple destinations within its boundaries. Moving visitors around Warren County is essential to driving economic impact. Strategies include:
 - Improve maps
 - Standardize visitor center kiosks and 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

Foster Greater Connectivity

- Reinterpret the Adirondack experience to appeal to Millennial audiences.
- 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.
- Establish an independent Advisory Board comprised of specific segments of the travel industry.
- Give WCT 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.
- 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 celebrate the scenic beauty of the destination while enriching and expanding upon current travel assets, strategically attracting specific market segments.
- Increase funding for Warren County Tourism – consolidate some of the monies now disbursed out to the townships into the marketing budget for increased event, public relations, and international outreach.
- Foster more regional collaboration.
- Foster more cross-promotion and education.



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