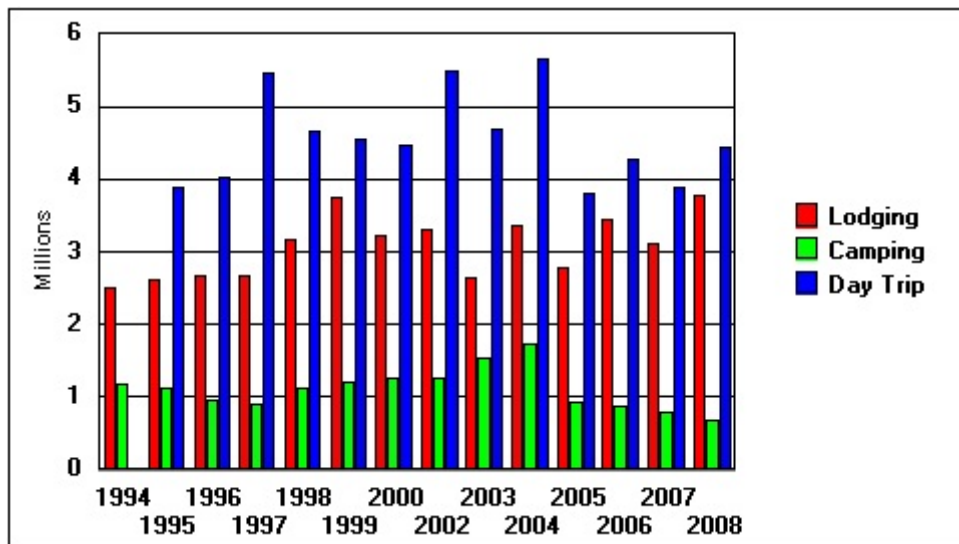


# Inter-Departmental Working Paper

## 2008 Warren County Occupancy Survey and Report



A Cooperative Venture Between  
The Warren County Departments  
of Planning and Tourism

## Table of Contents

Staff Notes .....	1
Determination of Seasonal Population .....	2
Camping Facilities .....	3
Visitor Population .....	4
Attractions Survey .....	4
Potential Economic Impacts .....	8
Comparison Chart .....	9

### **Tables**

<i>Table 1 Visitors by Community</i>	2
<i>Table 2 2006-2007 Utilization Comparison</i>	2
<i>Table 3 Seasonal Adjustments</i>	3
<i>Table 4 Camping Population Tabulations</i>	3
<i>Table 5 Comparison with previous years</i>	4
<i>Table 6 Survey Values</i>	6
<i>Table 7 Economic Impacts</i>	8
<i>Table 8 Comparison With Previous Surveys</i>	9

## Staff Notes Relative to The Occupancy Survey Conducted by The Tourism Department and The Planning Department

This working paper is the result of a cooperative venture between the Planning Department and the Tourism Department. The initial purpose of the paper was to quantify the number of seasonal visitors to Warren County. To that end, this paper provides general information that is useful in assessing needs within the County relative to visitor services. This paper identifies trends in the number and origin of visitors to the County, but is not meant to obviate the need for a detailed market study necessary for business planning.

For 2008, the average stay for the 3,749,205 lodging guests identified in this paper was 3.19 days and the average persons per stay was 2.79 persons. Therefore, there were 1,343,801 room nights during the time period covered by this paper. These lodging events represent families or groups visiting Warren County and this paper does not identify if any of these families or groups visit the County more than once during the study period. A comparison chart provided in this paper reflects the trend in visitor events over the years.

Included in this year's report is an estimate of potential impact of the tourism industry on Warren County. Based on estimated expenditures, it can be determined that probable Tourism expenditures in 2008 were approximately \$628,000,000 (see page 8).

This paper provides a useful tool for assessing trends in the visitor events within the County. Readers are cautioned against using this data for purposes other than what it was originally intended. The data is accurate to the degree proven by statistical methods but is not intended to replace detailed market analysis. As shown in the statistical formulas, there are not enough survey responses to provide a satisfactory comfort level with the results. A further degradation in the statistical validity of results will not warrant resources being expended for data collection or tabulation. As a result of the limited number of responses, the validity of the numbers derived from the surveys only reaches a 90% confidence level. The implications of this confidence level means that the figures are accurate to plus or minus ten percent. While not sufficient for detailed market studies the computations are useful when comparing trends from year to year.

Specific questions regarding analysis of data or analytical methods may be directed to the Planning Office.

Due to such a small sample size, since 2005, of the attractions responding to survey requests the calculated number of day trip visitors was significantly higher than normal and does not pass a statistical validity test. As a result, day trip visitation from 2005 and forward is calculated using data provided by D.K. Shifflet and Associates regarding day trip visitor rates for the Adirondack region. There may be a variation between the Adirondack region rates and those specific to Warren County but, in the absence of better data, the Adirondack region numbers are being used.

## Determination of Seasonal Population

The time period covered by this section is from Columbus weekend of 2007 through the end of October 2008. Using the 2008 Warren County Travel Guide, it was determined that during peak seasons there are 9,913 rooms available within the County on a daily basis for non-resident lodging use. Results from the Accommodation Survey indicate that the average registration was 2.79 persons.

**Table 1**  
***Visitors by Community***

	<b>Responses</b>	<b>Total Rooms</b>	<b>Total Facilities</b>	<b>Utilization Rate</b>	<b>Visitor Events</b>
Bolton	4	703	23	30.26%	252,311
Chester	2	213	21	43.50%	101,464
Hague	1	411	10	16.50%	99,002
Horicon	2	33	6	22.04%	7,966
Johnsburg	1	375	22		
L Geo Town	8	4351	108	29.04%	1,552,505
L Geo Village	3	2179	42	44.88%	928,130
Lake Luzerne	3	237	16	28.26%	48,896
QBY	2	836	14	53.65%	654,876
Stony Creek	1	114	2		
Thurman	0	0	0		
Warrensburg	2	221	15	30.32%	48,922
Glens falls	1	140	4	53.95%	55,135
	30	9,813	283	32.04%	3,749,205

The process used to determine the non-resident lodging utilization within the County involves the use of survey responses which indicated that, County-wide, the occupancy rate for accommodations was 32.04% of the yearly capacity not adjusted for seasonal closures. Information on seasonal adjustments may be found on page 3. Therefore, based on the preceding information, the yearly seasonal occupancy is computed to be 3,749,205 persons.

The following table provides a comparison, by month, of occupancy rates for the 9,813 rooms available within Warren County.

**Table 2**  
***2006-2007 Utilization Comparison***

	<b>2008</b>	<b>2007</b>	<b>Change</b>
January	11.52%	10.85%	0.67%
February	18.90%	15.38%	3.52%
March	13.07%	13.85%	-0.78%
April	11.54%	13.67%	-2.13%
May	27.51%	24.61%	2.90%
June	50.48%	47.88%	2.60%
July	74.32%	69.98%	4.34%
August	77.59%	72.73%	4.86%
September	33.19%	40.01%	-6.82%
October	25.56%	26.29%	-0.73%
November	9.78%	11.81%	-2.04%
December	11.02%	11.26%	-0.24%

Estimated Occupancy Rates of rooms available for rent. Total room count is 9,813 per the 2008 Warren County travel guide. Of those rooms, only 4,432 or 45.16% are available on year round basis with the remainder being seasonally available.

**Table 3**  
**Seasonal Adjustments**

<i>Month</i>	<i>Survey Rate</i>	<i>Adjustment Value</i>	<i>Actual Occupancy rate of Available Rooms</i>
<i>January</i>	<i>11.52%</i>	<i>45.16%</i>	<i>25.51%</i>
<i>February</i>	<i>18.90%</i>	<i>45.16%</i>	<i>41.85%</i>
<i>March</i>	<i>13.07%</i>	<i>45.16%</i>	<i>28.94%</i>
<i>April</i>	<i>11.54%</i>	<i>45.16%</i>	<i>25.55%</i>
<i>May</i>	<i>27.51%</i>	<i>45.16%</i>	<i>60.92%</i>
<i>June</i>	<i>50.48%</i>	<i>100.00%</i>	<i>50.48%</i>
<i>July</i>	<i>74.32%</i>	<i>100.00%</i>	<i>74.32%</i>
<i>August</i>	<i>77.59%</i>	<i>100.00%</i>	<i>77.59%</i>
<i>September</i>	<i>33.19%</i>	<i>100.00%</i>	<i>33.19%</i>
<i>October</i>	<i>25.56%</i>	<i>100.00%</i>	<i>25.56%</i>
<i>November</i>	<i>9.78%</i>	<i>45.16%</i>	<i>21.66%</i>
<i>December</i>	<i>11.02%</i>	<i>45.16%</i>	<i>24.40%</i>

**Camping Facilities**

Information from the 2008 Warren County Travel Guide indicates that there are 4,866 camping sites within the County included within 36 different facilities. These campgrounds are both public and private ownership and were provided a separate Occupancy Survey. Ten of the campgrounds responded to include 1,722 sites.

**Table 4**  
**Camping Population Tabulations**

	<b>Facilities</b>	<b>Sites</b>	<b>Occupancy Rates</b>	<b>Population</b>
Bolton	3	455	21.21%	140,910
Chester	6	464	10.92%	50,849
Hague	2	382	4.03%	19,683
Horicon	2	97	4.03%	14,306
Johnsburg	0			0
L Geo Town	13	2061	7.51%	197,675
L Geo Village	0			0
Lake Luzerne	2	242	4.94%	15,282
QBY	1	370	31.03%	138,293
Stony Creek	1	40	12.77%	5,899
Thurman	0	0	12.77%	0
Warrensburg	6	755	0.00%	0
Glens falls				0
	36	4,866		582,897

The average occupancy rate was 12.77% on an annualized basis with 3.16 persons per campground, staying for an average of 3.2 days. Using these figures, it is computed that the campground contribution to the seasonal population mix for 2008 was 582,897 persons.

## Visitor Population

The campground population was estimated at 582,897 and the population of overnight guest events was estimated at 3,749,205. Using information provided by the Tourism Department and survey respondents, it is estimated that 50% of visitors to local attractions were overnight guests. Therefore, it is estimated that day trip visitors to Warren County numbered about 4,332,103. The total visitor events are calculated at 8,664,206.

### Attractions Survey

A survey of county attractions was added to the process in 1996. Utilizing responses from the attractions survey it is possible to determine the number of day trip visitors to Warren County. Due to limited survey response it has been decided to use the day trip information generated by DK Shifflet and Associates for the Adirondack Region.

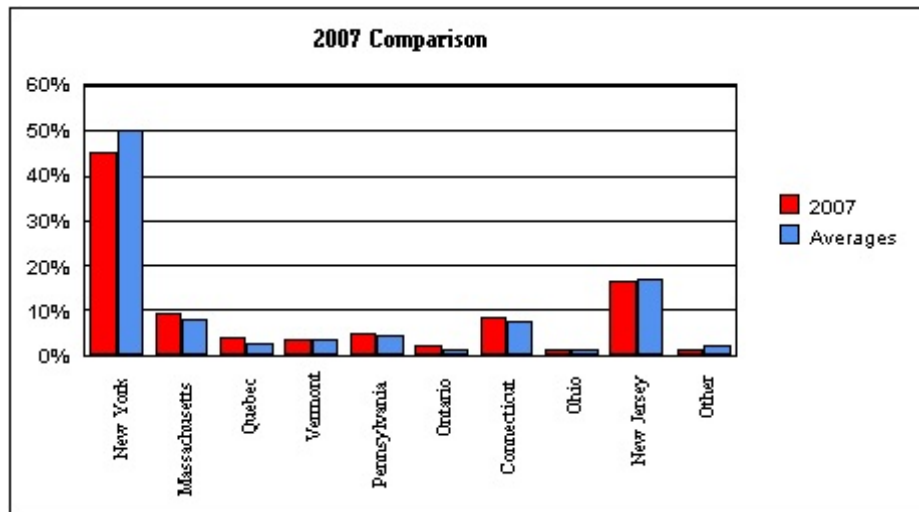
***Table 5***  
***Comparison with previous years***

	1997	1998	1999	2000	2002	2005	2006	2007
<i>Day trips</i>	61.67%	52.92%	48.44%	52.00%	54.78%	49.31%	71.62%	50.00%
<i>Business variation</i>	13.75%	9.40%	9.20%	N/A	0.00%	4.71%	0.50%	7.25%
<i>% of business attributed to group tours</i>	8.92%	17.21%	10.18%	N/A	14.32%	10.21%	4.75%	9.66%
<i>Gate counts</i>	566,889	1,100,244	1,171,089	1,067,075	1,454,541	1,110,402	1,415,456	898,972
<i>Gate counts attributed to group tours</i>	70,760	189,351	119,187	N/A	208,290	113,372	67,234	86,840

The average number of group tours for each facility that accepts them was 42 per year.

## Origins of Visitors

Information that was collected in 1995, and updated yearly since, pertains to the origin of visitors to the County who utilized some form of lodging facility. The accuracy of the information is only as good as the records kept by the facility owners. It is evident upon review of information that some figures provided are ball park figures and some are very accurate percentages. The following graph provides a pictorial representation of the points of origin for 2008 compared to the averages since the study was first initiated. Absolute values are provided in Table 6.

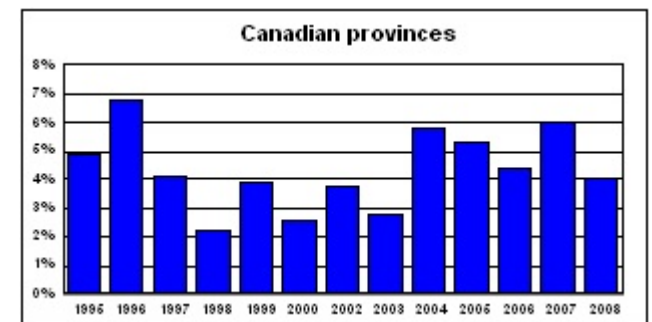
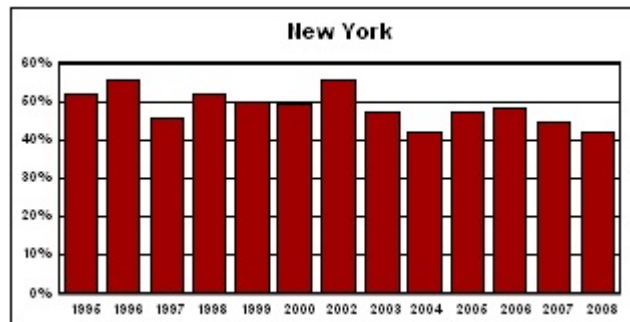
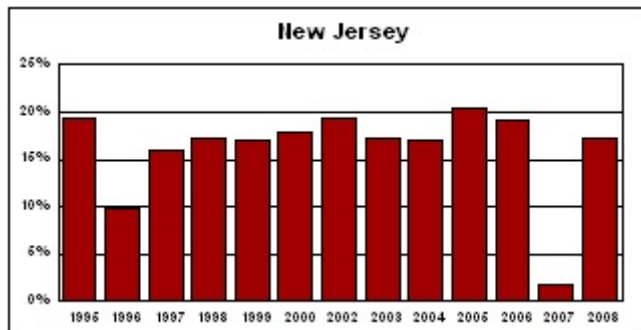


**Table 6**  
**Survey Values**

	1995	1996	1997	1998	1999	2000	2002	2003	2004	2005	2006	2007	2008	Average
New York	51.66%	55.68%	45.71%	52.31%	49.92%	49.57%	55.57%	47.21%	42.25%	47.20%	48.54%	44.80%	41.94%	48.64%
Massachusetts	9.51%	9.58%	9.13%	9.76%	7.59%	7.61%	8.18%	5.77%	8.61%	7.86%	8.28%	9.47%	6.45%	8.29%
Quebec	3.24%	5.47%	2.73%	1.38%	2.64%	1.57%	2.26%	1.47%	3.36%	3.85%	2.89%	3.99%	2.78%	2.89%
Vermont	3.07%	4.19%	3.48%	3.32%	3.89%	3.02%	3.36%	2.88%	3.93%	3.85%	3.67%	3.96%	3.02%	3.51%
Pennsylvania	3.57%	2.04%	4.51%	4.99%	4.61%	4.32%	4.81%	4.04%	9.89%	3.99%	4.48%	5.27%	4.02%	4.66%
Ontario	1.66%	1.29%	1.42%	0.81%	1.28%	1.03%	1.50%	1.36%	2.43%	1.46%	1.53%	2.01%	1.29%	1.47%
Connecticut	9.02%	6.21%	8.24%	8.86%	9.30%	6.81%	8.19%	7.33%	6.15%	7.71%	8.41%	8.58%	5.44%	7.71%
Ohio	1.61%	0.03%	0.80%	1.39%	1.26%	1.05%	1.03%	0.87%	1.84%	1.30%	1.65%	1.16%	0.54%	1.12%
New Jersey	19.42%	9.79%	16.05%	17.14%	16.97%	17.81%	19.45%	17.13%	16.96%	20.55%	18.99%	16.71%	17.33%	17.25%
Other	<u>2.04%</u>	<u>1.01%</u>	<u>2.45%</u>	<u>1.94%</u>	<u>2.89%</u>	<u>2.20%</u>	<u>1.05%</u>	<u>1.81%</u>	<u>4.80%</u>	<u>1.98%</u>	<u>2.49%</u>	<u>1.41%</u>	<u>0.27%</u>	<u>2.03%</u>
	104.80%	95.29%	94.52%	101.90%	100.35%	94.99%	105.40%	89.87%	100.22%	99.75%	100.93%	97.36%	83.08%	98.78%

Historical Patterns

The following charts offer a pictorial representation of some of the data from Table 1.





## Observations

There was no attempt to massage the numbers provided by respondents even when total usage exceeded 100%.

1. *As evidenced by the data, New York State has remained as a primary resource area to visitors to Warren County. The second largest resource area for visitors within the County is New Jersey at 17.33%.*
2. *The response rate of 12.37% of the lodging facilities is well below the 13 year average of 20.23%*
3. *The average number of people per stay was 2.79. This number represents a slight increase from 2.64 persons in 20076 and is below the average of 3.10.*
4. *There was a significant drop in the length of stay from previous years. In 2006 the average stay was 5.59 days and that figure dropped to 3.19 days in 2008. The 2008 figure is also well below the 13 year average of 3.98 days.*
5. *As is to be expected, the primary market area for visitors to Warren County utilizing lodging facilities appears to be states included within, approximately, a 300 mile radius of the Lake George region.*
6. *The sharp rise in gasoline costs undoubtedly had an impact on the number of visitor events to the County and on vacation travel patterns.*
7. *The number of rooms now available in Saratoga Springs has increased and may have a negative impact on room utilization within Warren County.*
8. *There was an slight decrease in the number of rooms available in Warren County from 9,913 to 9,813. The number of rooms available on a year round basis increased from 4,230 to 4,432.*
9. *There has been an increase in the ‘chain’ hotels in the lower basin without a significant increase in the total number of rooms available. This would imply that the chain hotels are supplanting a number of the smaller facilities. The decrease in the length of stay may be partially attributed to a decrease in the number of “Mom and Pop” facilities that traditionally offered weekly rentals.*

Potential Economic Impacts:

To determine an estimate of the economic impact of the tourist industry on Warren County a few assumptions need to be made. Based on Adirondack regional information, it is assumed that a day visitor to Warren County will expend approximately \$45 per day and an overnight visitor will expend approximately \$115<sup>1</sup> per day. Using these numbers the following table is provided using figures from this report.

**Table 7**  
**Economic Impacts**

		<b>Day trip</b>	<b>Overnight</b>	
	<b>Share</b>	<b>expenditures</b>	<b>Expenditures</b>	
Daily Rate		\$45	\$115	
Transportation	20%		\$99,638,371	\$99,638,371
Entertainment	16%	\$31,191,142	\$79,710,697	\$110,901,839
Shopping	17%	\$33,140,589	\$84,692,615	\$117,833,204
Room	19%		\$94,656,452	\$94,656,452
Food	23%	\$44,837,267	\$114,584,126	\$159,421,393
Other	5%	\$9,747,232	\$24,909,593	\$34,656,825
	100%	\$118,916,275	\$498,191,969	\$617,108,244
Tourism expenditures				\$617,108,244

**Table 8**  
**Comparison With Previous Surveys**

Comparison Chart															
	1994	1995	1996	1997	1998	1999	2000	2002	2003	2004	2005	2006	2007	2008	Avg.
<b>Accommodations</b>															
Surveys Distributed	323	302	298	292	295	295	296	302	293	299	299	292	285	283	298
Surveys Returned	84	84	87	75	65	72	64	56	51	48	43	44	36	35	60
Response Rate	26.00%	27.81%	29.19%	24.32%	22.03%	24.41%	21.62%	18.50%	17.41%	16.05%	14.72%	16.15%	12.63%	12.37%	20.23%
Units Responding	1,965	2,195	1,823	1,480	1,794	2,414	1,711	1,832	1,606	N/A	1,445	1,599	1,879	1,070	1,630
Occupancy Rates	27.00%	26.40%	25.91%	26.43%	28.19%	30.55%	27.41%	32.67%	28.19%	25.18%	25.78%	28.26%	28.53%	10.70%	26.51%
Avg. People	2.9	3.04	3.25	3.26	3.48	3.3	3.2	3.61	2.75	3.08	3.15	3.01	2.64	2.79	3.10
Avg. Stay (days)	4.2	4.26	4.05	4.05	3.94	3.75	3.67	4.56	3.19	4.23	4.03	5.59	2.96	3.19	3.98
% Reservation	81.00%	85.47%	80.98%	82.41%	85.06%	84.26%	81.43%	96.55%	81.76%	79.22%	90.68%	91.55%	81.93%	81.25%	84.54%
% Business	6.00%	7.03%	8.64%	12.96%	11.02%	11.58%	16.02%	10.24%	16.68%	17.77%	10.69%	10.16%	18.79%	19.02%	12.61%
Lodging Guests	2,480,180	2,609,947	2,651,760	2,656,103	3,164,184	3,747,280	3,222,751	3,286,045	2,634,106	3,358,713	2,792,351	3,439,306	3,093,630	3,749,205	3,063,254
Room Nights <sup>2</sup>	855,234	858,535	815,926	814,756	909,248	1,135,539	1,007,110	910,262	957,857	1,090,491	886,461	1,142,627	1,171,830	1,343,801	992,834
<b>Campgrounds</b>															
Surveys Distributed		40	40	40	40	40	40	39	42	34	36	35	35		33
Surveys Returned		18	16	12	18	10	7	13	15	16	12	11	12	10	12
Camping Guests	1,185,654	1,127,440	956,219	884,278	1,137,997	1,192,482	1,242,613	1,246,051	1,543,187	1,703,632	941,769	833,617	781,757	582,898	1,097,114
<b>Attractions</b>															
Surveys Distributed			114	115	122	127	127	130	177	182	179	207	189		119
Surveys Returned			23	16	16		11	23	26	20	13	16	16		13
Day Trips <sup>1</sup>		3,889,933	4,010,220	5,461,350	4,660,696	4,559,781	4,465,364	5,491,223	4,664,474	5,652,746	3,734,120	4,272,923	3,875,387	4,332,103	4,219,309
Total Visitor Events	3,665,834	7,627,320	7,618,199	9,001,731	8,962,877	9,499,543	8,930,728	10,023,319	8,841,767	10,715,091	7,468,240	8,545,846	7,750,774	8,664,206	8,379,677

<sup>1</sup> This figure is derived from information published by D.K. Shifflet and associates.

## Endnotes:

1. Based on a travel profile prepared by D.K. Shifflet & Associates for 2004 on the Adirondack Region.
2. These numbers differ from previous reports as there was an error in calculations. This row now identifies room nights rather than visitors.

# Tables