

MAY 2011

# CAYUGA COUNTY OFFICE OF TOURISM TRAVEL MARKET RESEARCH STUDY



**YOUNG**  
strategies, inc. | fresh.  
travel.  
research.

## REPORT SECTIONS

<u>1. Executive Summary of Research</u> .....	1.1 – 1.7
<u>2. Lodging Analysis</u> .....	2.1 – 2.12
<u>3. Online Survey Report</u> .....	3.1 – 3.21
<u>4. Project Team</u> .....	4.1 – 4.2

## RESEARCH METHODOLOGY

**OBJECTIVE:** CCOT retained Young Strategies, Inc, a Charlotte, NC based research and planning firm, to conduct scientific research to strategically analyze the tourism market in Cayuga County and update previous research data. The market analysis herein addresses:

- The very unique aspects of Cayuga County as a tourism destination.
- Identifies by market segment those attraction features/amenities within the destination, which drive tourism and generate both overnight and repeat visitors to Cayuga County. An analysis of how the varied attractions and outdoor activities drive room nights is provided.
- Segments the specific visitor types and demographics for each type of lodging.

### 1. Client Meeting, Destination Review and Leader Interviews:

- Site Visit (three days, three nights) – Berkeley Young and Amy Stevens visited Cayuga County February 15 – 18, 2011 to tour the area, gain market knowledge first-hand and interview key travel industry leader/partners.

### 2. Lodging Research:

- YSI distributed a survey to all lodging properties in the Cayuga County market area to determine visitor market segmentation, primary feeder markets, walk-in occupancy, primary drivers of visitation, room nights sold annually, average daily rate, primary visitor activities and other metrics identified by client as critical for analysis.
- Six hotel/motel properties and 11 bed & breakfast inns representing 374 rooms participated in the survey representing a 60% response rate.
- Smith Travel Research (6-year trend report for Cayuga County) - analysis of market statistics and trends including ADR, RevPAR, Supply & Demand as well as annual, monthly and weekly occupancy analysis.

### 3. Inquiry and Visitor Profile Research (online survey):

- Purpose: to document the profile of visitors to the County by segment, the size (universe) of the potential market from each of the identified visitor segments, the perceptions of the Cayuga region as a destination, and the attractors that induce overnight visitors, multiple night visitors and repeat visitors. Research will include those who have and have not visited the Cayuga area.
- CCOT provided Young Strategies with a sample of their 2010 inquiry databases totaling 4,499 names and email addresses (Overall inquiries processed by CCOT exceeded 15,000). An email survey invitation was distributed to the sample of 4,499 email inquiries March 9, March 21, April 4 and April 13, 2011. 51 email addresses bounced, 77 opted out and 209 responded from the 4,371 that were delivered successfully represented a 4.8% response rate. This is an acceptable response rate and comparisons of the response data to previous surveys and national travel trend data verifies the validity of the responses herein.

### 4. Strategic Planning Board/Staff Survey and Workshop

- An online survey of Cayuga County Office of Tourism Board and staff members was conducted as a prelude to a strategic planning workshop conducted on May 10, 2011. The survey allowed each leader to share their opinions and vision for the future in a confidential manner.
- Berkeley Young facilitated a strategic planning workshop for the Cayuga County Office of Tourism Board of Directors and Staff. The data from all research segments served as the basis for this planning session.
- Short term and long range goals were established.

### 5. Final Report Including Research Data Conclusions and Recommendations:

The study research is provided by section and segment with conclusions and recommendations for on-going and future research to be conducted by the destination marketing staff. A list of prioritized strategic recommendations for marketing and product development was developed following the Board retreat.

## OVERALL RESEARCH OBSERVATIONS AND RECOMMENDATIONS

Reviewing the data from the visitor, lodging, staff and community leader surveys conducted in this study and comparing that data to American travel market research reveals some critical trends for Cayuga County as related to the travel industry.

- The Cayuga County travel industry is emerging from a tumultuous decade in good condition and is well positioned for growth in the coming years. Since 2001 the U.S. travel industry has experienced dramatic changes as the overall U.S. economy declined 2001 - 2004, rebounded 2004 – 2007, declined drastically 2008 – 2010 and is poised from a gradual recovery in 2011.
- The travel market has changed for Cayuga County. Since 2001 traveler behavior is different, competition is increasing, regional marketing has changed, state leadership is weaker and the CCOT is strong and well positioned to lead the travel industry going forward.
- The Cayuga County lodging inventory has changed minimally since 1999 and demand for rooms is on the rise after two declining years (2008 & 2009). The discussion of new lodging development in Auburn is underway which will cause a shift in occupancy patterns and possibly drive new demand for rooms. The research revealed strong demand (75%) for lakefront lodging.
- The report card for CCOT since 2006 is very good with inquiry generated visitor spending up along with improved inquiry conversion, longer lengths of stay and improved visit satisfaction.

## CAYUGA COUNTY LODGING MARKET ANALYSIS

- Cayuga County currently has 629 lodging rooms. 15 Hotel/Motel properties with 543 rooms account for 86.3% of room inventory while 18 Bed and breakfast inns with 86 rooms account for 13.7% of the total lodging inventory.
- The majority of Cayuga County's hotel/motel lodging inventory (77.2%) was built prior to 1990. Only two hotel/motel properties have been added (124 rooms) since 1991. Both are located in Auburn; Super 8 (March 1992, 47 rooms), The Inn at the Finger Lakes (April 1999, 77 rooms).
- The Holiday Inn Auburn opened in February 1980 as the largest property in Cayuga County with 165 rooms accounting for 26% of the current lodging room inventory.
- In 2005 the Aurora Foundation and Pleasant Rowland completed a multi-million dollar renovation of the E.B. Morgan House, converting it from a Wells College guest house to a stunning lakefront inn adding 7 rooms to the B&B lodging inventory.
- YSI purchased a STR 6 year trend report for Cayuga County, NY on April 5, 2011. The data points below come from that report which has adjusted data. Cayuga County lodging occupancy was slightly lower than national averages 2007 – 2010. Declines in Cayuga occupancy occurred in 2008 (-3%) and 2009 (-9.4%) mirroring nationwide performance.
- Cayuga County's lodging occupancy began to recover in 2010, up +8.2% over 2009.
- Overall, leisure travelers (41%) account for the highest percentages of lodging occupancy in 2010. Individual business travelers reported second highest overall at 33%. However, further analysis by property type showed individual business the highest segment for the Cayuga County hotel/motel properties at 39.7%. Conference/meeting/group travel was reported third highest at 23.2%.
- Winter months of December and January are slowest, while highest occupancy has typically occurred in August, which the exception of 2010 where July reported slightly higher than August.
- Highest occupancy percentages are on Saturday nights followed closely by Friday, while Sunday and Monday have the lowest occupancy levels.

**2010 PROJECTED ANNUAL OVERALL LODGING MARKET SEGMENTATION**

ALL	HOTEL/ MOTEL	B&B/ INNS	Category
<b>41.2%</b>	<b>31.7%</b>	<b>83.2%</b>	<b>Individual Leisure</b>
32.5%	23.1%	73.7%	Tourists visiting the area (local attractions/historic sites, etc.)
4.5%	4.6%	4.2%	Visiting local friends & relatives
4.2%	4.0%	5.3%	Tourists passing through as part of a longer trip
<b>33.2%</b>	<b>39.7%</b>	<b>4.8%</b>	<b>Individual Business</b>
26.6%	31.6%	4.8%	Individual business travelers (white collar)
6.6%	8.1%	0.0%	Blue collar workers
<b>23.2%</b>	<b>25.8%</b>	<b>11.9%</b>	<b>Conference/Meeting/Group</b>
2.5%	3.1%	0.0%	Group tour/Motorcoach
4.4%	5.3%	0.2%	Conference/meetings
4.4%	5.4%	0.1%	Team sports/events/tournaments
11.9%	12.0%	11.6%	Weddings/reunions/family events/social events
<b>2.4%</b>	<b>2.8%</b>	<b>0.1%</b>	<b>Other</b>
2.4%	2.8%	0.1%	Other (specify):

Source: YSI Lodging Survey – Total lodging response = 60% (374 rooms reported out of 629 total)

**FOUR-YEAR HOTEL/MOTEL ANNUAL SUPPLY & DEMAND TREND**



**ONLINE SURVEYS – DATA SUMMARY**

- Overall response data is consistent with and shows improvement over similar 2006 conversion survey.
- Demographic profile and point of origin are relatively unchanged. Increased response from Ohio is noted.
- Conversion of inquiries to visitors has improved from 36% in 2006 to 55% in 2010. Indicates success of fulfillment, quality of guide and the need to expand outreach to wider geographic/demographic audience.
- Length of stay increased from 2 nights to 2.3 nights with 26% day trippers. Overnighters averaged 3 nights.
- Average trip expenditures increased from \$775 to \$780.
- Adults without kids remain the primary audience coming to Cayuga County for a relaxing weekend getaway among scenic beauty and wineries with unique shopping and dining. Lakefront lodging is highly desired.

Question	CCOT Inquirers Responses N = 208
<b>Survey Respondent Demographics:</b>	
Average Age	54 years
Gender:	Male - 43%; Female - 57%
Occupation	Retired -27%; Manager - 7%; Teacher - 5%; Assistant - 3%; Sales - 3%; Homemaker - 2%; Secretary - 2%; Owner - 1%
Level of Education	College degree - 36%; Graduate school - 29%; Some College - 24%
Respondent Point of Origin	NY-39%, PA-18%, OH-9%, NJ-5%, CA-4%, MA-3%, MD-3%, FL-3%, CT-2%, IL-2%, RI-2%, CANADA-9%
<b>Trip Planning Characteristics:</b>	
Did you receive the Cayuga County visitor information you requested?	Yes - 92%; No - 4% Don't Remember - 4%
Where did you find Cayuga County tourism information?	www.fingerlakes.org - 34%; <b>CCOT website - 30%</b> ; FLT Guide - 24%; <b>CCOT Visitors Guide - 19%</b> ; NY Travel Guide – 15%; Travel Stories – 10%
Please rate the following aspects of the Cayuga County Visitor Guide on a scale of 1-5 where 5 is excellent, 3 is average and 1 is poor.  n = 170	Arrived in Good Condition 4.79 Quality Photography 4.61 Prompt Delivery After Inquiry 4.61 Overall Appeal of the Guide 4.59 Easy to Use 4.56 Inspired You to Visit Cayuga County 4.45 Detailed Planning Information 4.36
Had you traveled to or through Cayuga County <u>BEFORE</u> you requested the visitor information from Cayuga County?	Yes 56% No 44%
Did you travel to Cayuga County <u>AFTER</u> you requested the visitor information from Cayuga County?	<b>Yes 55%</b> No 45%
Please tell us why you chose <u>not</u> to visit Cayuga County  List any destination you may have visited instead.	Cayuga County trip planned in the future 35% No time or money 35% Did not go anywhere 50% Other included NY areas, Finger Lakes & Florida
How many times have you visited Cayuga County in the last three years?	None - 30%; One - 31%; Two - 13%; Three - 6%; Four - 3%; Five - 3%; Six or More - 14%;

## Executive Summary

Cayuga Visitor Behavior (Those who visited n = 94):	
Please indicate the months in which you have visited Cayuga County.	Typical bell curve with summer peak August 48% July 45% September 42%
For your last trip to Cayuga County, did you use the website www.tourcayuga.com for planning or making reservations?	<b>Yes 36%</b> No 64%
Please rate your opinion of each aspect of the website www.tourcayuga.com on a scale of 1-5 where 5 is excellent, 3 is average and 1 is poor. (rate each)	Inspired you to visit 4.57 Overall satisfaction 4.55 Easy to use 4.52 Ease of navigation 4.52 Visual appeal 4.48
How far in advance did you plan your most recent trip to Cayuga County, NY? (select one)	<b>1 to 2 weeks before travel 21%</b> <b>1 month before travel 24%</b> 2 months before travel 22% 3 months or more before travel 33%
How many nights did you stay in Cayuga County on your most recent visit?	Overall average = 2.3; <b>Overnight only = 3.1</b> Day trippers = 26%
How would you categorize your most recent trip to Cayuga County? (select one)	<b>Weekend Getaway - 33%</b> ; Vacation(4+ nights) - 26% Weekday Getaway (1-3nights) - 12%; Business - 3%
What was the major purpose of this trip to Cayuga County? (select one)	<b>General Relaxation - 17%</b> ; Visit a winery - 13% Visiting Friends & Relatives 13%; Shopping - 8% Romantic Getaway - 8%; Festival Event - 6%
What type of lodging did you use most during your last visit to Cayuga County?	<b>Hotel/Motel - 56%</b> ; Bed and Breakfast Inn - 16% Friends/Family House - 14%; Vacation Rental - 10%
What mode of transportation did you use to get to and around Cayuga County?	Automobile Only - 86%; Fly/Drive - 7% Motorcycle – 4%; RV/Camper - 3%
How many were in your immediate travel party?	<b>Adults 2.4</b> <b>Adults Only % 72%</b> <u>Traveling W/ Kids</u> 28% <u>Children</u> 2.0 Traveled with pets 14%
How much did your party spend while in Cayuga County?	Lodging \$298.14 Food/Meals \$175.33 Shopping \$123.15 Wineries \$76.73 Auto Fuel \$74.59 Attractions/Events \$32.15 <b>Average Trip Spending: \$780.10</b>
Overall, how would you rate your visit to Cayuga County on a scale of 1-5 where 5 is excellent, 3 is average and 1 is poor.	<b>Overall Average Rating 4.5</b> Excellent (5) 60%; Very Good (4) 33%; Average (3) 7%
What did you <b>like</b> most about your visit to Cayuga County?	<b>Beautiful Scenic Area - 38%</b> ; Wineries - 13%; Friendly People - 8%
What did you <b>dislike</b> most about your visit to Cayuga County?	Nothing - 37%; Didn't Spend Enough Time - 6%; Expense - 5%; Distance from Home - 5%
How many wineries did you visit in Cayuga County?	71% reported visiting a winery; None - 29%; One- 14%; Two- 20%; Three- 15%; Four + 22%

## Executive Summary

Cayuga Visitor Behavior (Those who visited n = 94):																													
<p>Following is a list of towns/attractions/events in Cayuga County. Please rate each that you visited on a 5 point scale where 5 is excellent, 3 is average, and 1 is poor. Indicate N/A if you did not go there.</p> <p>Note: a list of 21 Cayuga County towns, attractions and events was provided with a write-in space for "other". The top 8 most visited by survey respondents are provided to the right.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>Top Town/Attractions</u></th> <th style="text-align: center;"><u>Count</u></th> <th style="text-align: center;"><u>Rating</u></th> </tr> </thead> <tbody> <tr> <td>State/County Park</td> <td style="text-align: center;">53</td> <td style="text-align: center;">4.5</td> </tr> <tr> <td><b>Wine Trails and Tours</b></td> <td style="text-align: center;"><b>55</b></td> <td style="text-align: center;"><b>4.6</b></td> </tr> <tr> <td>Auburn</td> <td style="text-align: center;">52</td> <td style="text-align: center;">4.1</td> </tr> <tr> <td>Fingerlakes Mall</td> <td style="text-align: center;">36</td> <td style="text-align: center;">3.9</td> </tr> <tr> <td>Aurora</td> <td style="text-align: center;">29</td> <td style="text-align: center;">4.2</td> </tr> <tr> <td>Bass Pro Shops</td> <td style="text-align: center;">29</td> <td style="text-align: center;">3.7</td> </tr> <tr> <td>Montezuma National Wildlife Ref.</td> <td style="text-align: center;">23</td> <td style="text-align: center;">4.3</td> </tr> <tr> <td>Mackenzie-Childs, LTD</td> <td style="text-align: center;">18</td> <td style="text-align: center;">4.4</td> </tr> </tbody> </table>	<u>Top Town/Attractions</u>	<u>Count</u>	<u>Rating</u>	State/County Park	53	4.5	<b>Wine Trails and Tours</b>	<b>55</b>	<b>4.6</b>	Auburn	52	4.1	Fingerlakes Mall	36	3.9	Aurora	29	4.2	Bass Pro Shops	29	3.7	Montezuma National Wildlife Ref.	23	4.3	Mackenzie-Childs, LTD	18	4.4	
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<p>What do you think makes Cayuga County unique or distinct from other destinations?</p>	<p>The <b>scenery/landscape</b> - 25%; The Lakes - 16% Wineries - 7%; quiet, laid back, friendly</p>																												
<p>What type of activities/products would appeal to you if offered in Cayuga County?</p>	<p><b>Lakeview Lodging - 75%</b>; Public Displays of Local Art - 47%; Summer Long Theatre Festival - 37% Auburn Wine Tasting Center - 33%; Culinary/Wine School - 31%</p>																												
<p>How many travel getaways (2-4 nights) do you take annually?</p>	<p>One - 11%; Two - 21%; Three - 25%; Four - 16%; Five - 10%; Six - 7%; Seven - 0%; 8 or more - 11%</p>																												

### 2010 ECONOMIC IMPACT OF CCOT MARKETING AND INQUIRY FULFILLMENT

- 4,499 - 2010 1/3 sample of CCOT fulfilled inquires (15,000+ inquiries fulfilled by CCOT).
- Online survey of inquiries revealed a 55% conversion rate = 2,474 travel parties.
- 26% are day trippers = 643 travel parties.
  - Average day trip expenditures = \$196 X 643 travel parties = **\$126,028**.
- 74% are overnight travelers = 1,830 travel parties.
  - (Average length of stay = 3.1 nights)
  - Average overnight travel party expenditures = \$986 X 1,830 travel parties = **\$1,804,380**
- **\$1,804,380 + \$126,208 = \$1,930,588** – Direct economic impact resulting from a 1/3 sample of CCOT marketing and inquiry fulfillment.



**RESEARCH CONCLUSIONS**

Impressive improvement in results from CCOT marketing and inquiry fulfillment:

	2006	2010
Inquiry Conversion	36%	55%
Average length of stay	2 nights	2.3 nights
Overall Trip Satisfaction	4.22	4.50
Overall Trip Spending (growth in a down economy)	\$775	\$780

- CCOT marketing budget was smaller in 2010 due to lack of state grant funding therefore advertising was placed in primary core markets resulting in high conversion. This was a smart strategy with a tight budget but the conversion is too high and will be lower in future years when advertising is expanded to broader markets.
- The summer season is reaching saturation where CCOT marketing efforts are likely to displace visitors already coming to the area with new visitors. Best chance for growth is in the shoulder seasons where lodging occupancy is lower than summer.
- Theater festivals and expansion of overall theater product is a good strategy for Cayuga County and can help drive the shoulder seasons.
- Emphasize unique dining and shopping.
- Promote rest & relaxation – the guest room, enjoying a scenic vista, leisurely dining, etc.
- Make your wineries stand out from other Finger Lakes wineries by connecting them with unique lodging, dining and shopping.
- Promote nature and outdoor activities to leisure visitors (walks, hikes, cycling, etc.)
- Promote weekend packages to drive Sunday night occupancy (three night deals).
- Promote weekday leisure packages and specials.
- New product development: **Lakeview Lodging - 75%**; Public Displays of Local Art - 47%; Summer -Long Theatre Festival - 37%; Auburn Wine Tasting Center - 33%; Culinary/Wine School - 31%

## **METHODOLOGY AND SUMMARY OF FINDINGS**

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Cayuga County, New York at the request of Cayuga County Office of Tourism (CCOT). A one-page questionnaire was written by YSI, approved by the CCOT, and sent to all Cayuga County lodging properties to estimate the following for the full calendar year 2010: percentage of occupancy driven by nine (9) market segments, top leisure feeder markets, walk-in reservations and travel party information. Hoteliers were also asked to provide annual occupancy percentages, average daily rates (ADR) and revenue-per-available-room (RevPAR) for calendar year 2010. The lodging survey was conducted during the months of February through March 2011.

## **SUMMARY OF LODGING STATISTICS**

- Cayuga County has approximately 629 lodging rooms (this number fluctuates regularly as lodging properties add and delete rooms from their inventory).
- Overall, Cayuga County currently has 15 Hotel/Motel properties with 543 rooms accounting for 86.3% of room inventory; while 18 Bed and breakfast inns with 86 rooms account for 13.7% of the total lodging inventory.
- The majority of Cayuga County's hotel/motel lodging inventory (77.2%) was built prior to 1990. Over the past two decades, only two additional properties have been added to room inventory (124 rooms) accounting for the remaining 22.8%. Both properties are located in Auburn; the Super 8 opened March 1992 (47 rooms), and the Inn at the Finger Lakes opened April 1999 (77 rooms).
- The Holiday Inn Auburn opened in February 1980 as the largest property in Cayuga County with 165 rooms accounting for 26% of the current lodging room inventory.
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- Cayuga County lodging occupancy was slightly lower than national averages 2007 – 2010. Declines in occupancy occurred in both 2008 and 2009, not only in Cayuga County but nationwide. Cayuga County's lodging occupancy began to recover in 2010, up +8.2% over 2009.
- Overall, leisure travelers (41%) account for the highest percentages of lodging occupancy in 2010. Individual business travelers reported second highest overall at 33%. However, further analysis by property type showed individual business the highest segment for the Cayuga County hotel/motel properties at 39.7%. Conference/meeting/group travel was reported third highest at 23.2%.
- Winter months of December and January are slowest, while highest occupancy has typically occurred in August, with the exception of 2010 where July reported slightly higher than August.
- Highest occupancy percentages are on Saturday nights followed closely by Friday, while Sunday and Monday have the lowest occupancy levels.

**CAYUGA COUNTY LODGING INVENTORY**

Cayuga County Office of Tourism provided YSI with a list of all lodging properties in Cayuga County, New York. According to the CCOT database **there are 15 hotel/motel properties (543 rooms; 86.3% of inventory) and 18 bed & breakfast inns (86 rooms; 13.7% of inventory) actively collecting the local lodging tax.** All 33 hotel/motel and bed & breakfast inn properties with a combined total of 629 rooms were asked to participate in the YSI survey. **Six hotel/motel properties and 11 bed & breakfast inn representing 374 rooms participated in the survey representing an overall 60% response rate.** Thus, the response of the Cayuga County lodging properties is considered to be a highly predictive sample representation of the overall market based on the geographic distribution and overall lodging styles and sizes in Cayuga County, NY. The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).

**CAYUGA COUNTY HOTEL/MOTEL INVENTORY – AGE, AREA & ROOM COUNT**

<b>Era / % of Market</b>	<b>Open Date</b>	<b>Area</b>	<b>Rooms</b>
<b>Unknown - 1970 – 11 properties = 27.5%</b>			<b>149</b>
Colonial Motel	na	Skaneateles	14
Days Inn – Weedsport	na	Weedsport	40
Dilaj’s Motor Inn	na	Auburn	18
King Ferry Hotel	na	Auburn	8
Pleasant Beach Hotel	na	Fair Haven	6
Scottish Inn & Suites	na	Auburn	24
Skaneateles Suites	na	Skaneateles	13
Sleepy Hollow Motel	na	Auburn	14
Whispering Winds Motel	na	Skaneateles	12
<b>Prior to 1990 – 4 properties = 49.7%</b>			<b>270</b>
Days Inn – Auburn	Jun-62	Auburn	51
Best Western Inn – Weedsport	Jun-71	Weedsport	34
Holiday Inn Auburn	Feb-80	Auburn	165
Budget Inn	Mar-88	Auburn	20
<b>1990 – 1999 – 2 properties = 22.8%</b>			<b>124</b>
Super 8 Auburn	Mar-92	Auburn	47
Inn at the Finger Lakes	Apr-99	Auburn	77
<b>15 Hotel/Motel Properties = 86.3% of total lodging inventory</b>		<b># of Rooms =</b>	<b>543</b>

Source: YSI Lodging Survey – Hotel/Motel lodging response = 58.9% (320 rooms reported out of 543 total)

**CAYUGA COUNTY LODGING INVENTORY**

**CAYUGA COUNTY BED & BREAKFAST INNS INVENTORY – AGE, AREA& ROOM COUNT**

Bed & Breakfast Inns	Open Date	Area	Rooms
10 Fitch	na	Auburn	3
A Touch of Country	na	Scipio Center	4
A Wicher Garden	na	Auburn	4
Anchor Resort – Marina – B&B	na	Fair Haven	11
Aurora Inn	na	Aurora	10
Chantelle-Marie Lakehouse	na	Auburn	4
Crow’s Nest Lodge	na	Fair Haven	3
Dill’s Run	na	Aurora	4
E.B. Morgan House	Jun-05	Aurora	7
Finger Lakes Golf House	na	Auburn	1
Home Again	na	King Ferry	7
Homer Wilson House	na	King Ferry	4
Hummingbird Home	na	Skaneateles	4
Lakeside Bed & Breakfast	na	Auburn	3
Little Sodus Inn	na	Fair Haven	2
Maplegrove Bed & Breakfast	na	Sterling	4
Oldest House in Moravia	na	Moravia	4
Springside Inn	na	Auburn	7
<b>18 B&amp;B PROPERTIES = 13.7% of total lodging inventory</b>		<b># of Rooms =</b>	<b>86</b>

Source: YSI Lodging Survey – B&B lodging response = 62.8% (54 rooms reported out of 86 total)

**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. **The table on the following page reveals the overall market segmentation as reported by the 17 lodging properties that participated in the YSI study.** The segments are presented in rank order. Most lodging properties track their guest segmentation through their reservation segments are presented in rank order. 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.

**MARKET SEGMENTATION**

**2010 PROJECTED ANNUAL OVERALL LODGING MARKET SEGMENTATION**

ALL	HOTEL/ MOTEL	B&B/ INNS	Category
<b>41.2%</b>	<b>31.7%</b>	<b>83.2%</b>	<b>Individual Leisure</b>
32.5%	23.1%	73.7%	Tourists visiting the area (local attractions/historic sites, etc.)
4.5%	4.6%	4.2%	Visiting local friends & relatives
4.2%	4.0%	5.3%	Tourists passing through as part of a longer trip
<b>33.2%</b>	<b>39.7%</b>	<b>4.8%</b>	<b>Individual Business</b>
26.6%	31.6%	4.8%	Individual business travelers (white collar)
6.6%	8.1%	0.0%	Blue collar workers
<b>23.2%</b>	<b>25.8%</b>	<b>11.9%</b>	<b>Conference/Meeting/Group</b>
11.9%	12.0%	0.0%	Group tour/Motorcoach
4.4%	5.3%	0.2%	Conference/meetings
4.4%	5.4%	0.1%	Team sports/events/tournaments
2.5%	3.1%	11.6%	Weddings/reunions/family events/social events
<b>2.4%</b>	<b>2.8%</b>	<b>0.1%</b>	<b>Other</b>
2.4%	2.8%	0.1%	Other (specify):

Source: YSI Lodging Survey – Total lodging response = 60% (374 rooms reported out of 629 total)

**MARKET SEGMENTATION ANALYSIS**

- **Overall the combined leisure segments (leisure tourists, VFR, and pass-through) are the largest market segment in Cayuga County reported at 41.2%.** When segmented by type of lodging property the majority of the lodging occupancy for the bed and breakfast inns was in this category at 83%.
- Overall, Individual business travel was reported as the second largest market segment at 33.2%. **However, further analysis by type of lodging shows this category to be the largest market segment for the Cayuga County hotel/motel properties at 39.7%.**
- The conference/meeting/group segment is the next largest market segment at 23.2%.

### **WALK-IN LODGING**

Fifteen Cayuga County lodging properties reported walk-in traveler percentage data. This question was further segmented by type of lodging property to see the difference between the percentages of walk-in travelers for the hotel/motel segment versus those travelers that stay at bed and breakfast inns. **Travelers booking a room without a prior reservation in 2010 at a hotel/motel property were reported at 11%. As expected, the percentage was significantly lower for the bed and breakfast segment at 3%.**

### **TRAVEL PARTIES COMPOSITION**

Sixteen Cayuga County lodging properties reported travel party composition. Again, this question was further segmented by type of lodging property to see the difference between the percentages of walk-in travelers for the hotel/motel segment versus those travelers that stay at bed and breakfast inns. **The hotel/motel segment reported 72% of travel parties contain adults only while 28% of travel parties contain children; directly correlating with national trends reported by US Travel Association that one in five (22%) trips in the United States include children.** The bed and breakfast inn percentage of adult-only travel parties was predictively much higher, reported at 96%.

### **ANNUAL/MONTHLY OCCUPANCY PERCENTAGES**

Cayuga County lodging properties were asked to report annual occupancy percentages for 2010 as well as monthly occupancy percentages if they were not currently reporting to Smith Travel Research. Overall, the results indicated that the finding of the YSI survey were almost identical to the occupancy percentages reported in the STR 6-Year Trend Report – Cayuga County, New York. Overall, the 2010 annual occupancy percentage was reported at 55% for the 13 participating properties.

**YSI further segmented by type of lodging property and found the data to be very predictive of national travel trends. The 2010 occupancy percentage for Cayuga County's hotel/motel properties was reported at 58%, while the bed and breakfast inn segment reported at 40%.**

Monthly occupancy percentages continue to follow the identical trends found in the 2007 data; summer months of June, July and August run highest occupancies, while January and December are typically the slowest months of the year. The fall months of September and October still show to be a strong shoulder season.

**LEISURE FEEDER MARKETS**

Lodging properties in Cayuga County, NY were asked to report the top leisure markets for their properties.

<u>Feeder Market</u>	<u>2010</u>
Rochester	7
New York City	6
Pennsylvania	6
New England/Boston	5
Canada	4
New Jersey	4
New York	4
Ontario	4
Syracuse	3
Buffalo	2
Philadelphia	2
Toronto	2

The response data revealed that the top points-of-origin for the Cayuga County leisure market are primarily **metropolitan areas in New York as well as the contiguous states of Pennsylvania, Massachusetts, New Jersey. Canada also tested well with both Ontario and Toronto being cited.** Most of the markets cited were within a **four to six hour drive radius.**

**PLEASE PROVIDE FUTURE MARKETING SUGGESTIONS FOR CAYUGA COUNTY TOURISM.**

Young Strategies, Inc. has provided the exact verbatim responses to this question as provided by the five lodging properties that responded to this question. Every effort has been made to protect the anonymity of the respondents.

- Bring in more attractions; bring in more conventions, corporate groups.
- Provide more cohesive tours (i.e. History’s Hometown Package)
- Affordable transportation to wineries, attractions, shopping, etc.
- **We have done all we can with July and August but am very interested in what can be done to increase our numbers in our shoulder season.**
- Promote Auburn History’s Hometown better with stronger online presence.
- Promote upcoming theatre festivals 2012.
- Our location-number of things to do within 1 hr drive, 3 lakes, Cayuga Wine trail link, Seneca Falls and Skaneateles Chamber for strongest tourism destination links.
- In order to attract more guests in the slower months (November – April), we need to continue to identify more demand generators (things to do while visiting us) and promote these activities. Also, we need to continue to develop more experiential travel packages pairing inns, B&B’s, and hotels with local artisans, businesses, etc. to create unique travel experiences for guests that give guests a chance to experience life in the Finger Lakes. Build experiences for guests based on our local history – highlight and

promote this more and find ways to get our guests on the lake more easily (boat tours, rental boats, etc.).

## SMITH TRAVEL RESEARCH DATA

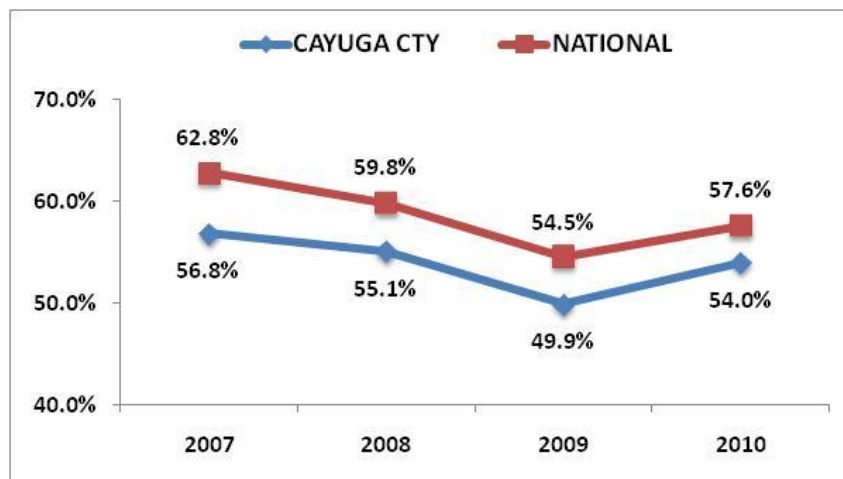
Young Strategies, Inc. obtained Cayuga County, New York data from Smith Travel Research (STR) in the form of a six-year trend report for all hotel/motel properties. The STR data reflects primarily chain-affiliated hotel/motels with a monthly response rate ranging from 83.6% to 90.7%. All tables and charts shown on the following pages 6-11, have been created from the data provided in the STR Six-Year Trend Analysis for Cayuga County, New York.

### ANNUAL OCCUPANCY DATA

The Cayuga County and STR national annual occupancy percentages are shown in the table and chart below.

#### FOUR-YEAR ANNUAL OCCUPANCY TRENDS

Year	Cayuga County STR	% of Change	National STR	% of Change
2007	56.8%	~	62.8%	~
2008	55.1%	-3.0%	59.8%	-4.8%
2009	49.9%	-9.4%	54.5%	-8.9%
2010	54.0%	+8.2%	57.6%	+5.7%





## CCOT LODGING ANALYSIS

The Cayuga County and STR national annual occupancy percentages were charted in the table above. While Cayuga County lodging occupancy has slightly underperformed national averages for the four-year period 2006 – 2008, their trend lines are nearly identical. 2010 was a year of recovery for both Cayuga County as well as for the nation as a whole. **Cayuga County's 2010 lodging occupancy was up +8.2% over 2009, outperforming the United State's 2010 change in occupancy of +5.7%.**

### MONTHLY OCCUPANCY

The table and chart below reveal the annual and monthly average occupancy rates for the Cayuga County, New York hotel/motel lodging market. The red numbers indicate the lowest occupancy each year while the blue numbers indicate the highest.

### MONTHLY LODGING OCCUPANCY PERCENTAGES

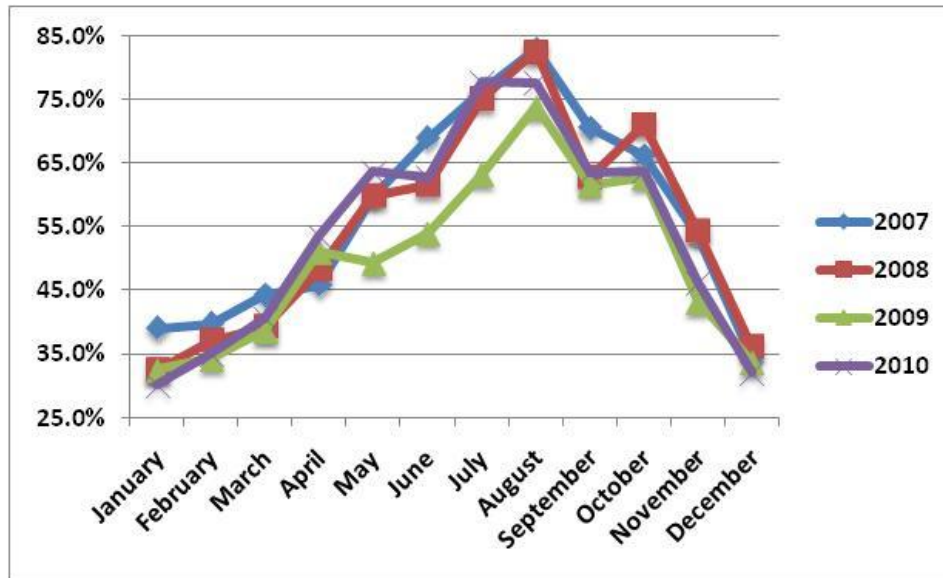
	2007	2008	2009	2010
January	38.9%	<b>32.4%</b>	<b>32.5%</b>	<b>30.1%</b>
February	39.7%	37.0%	34.2%	35.0%
March	44.2%	39.2%	38.6%	40.7%
April	45.8%	48.2%	51.1%	<b>53.5%</b>
May	59.6%	59.8%	49.3%	<b>63.6%</b>
June	68.9%	61.5%	54.0%	62.7%
July	76.3%	75.1%	63.2%	<b>77.7%</b>
August	<b>82.9%</b>	<b>82.6%</b>	<b>73.8%</b>	77.5%
September	70.4%	62.8%	61.6%	63.4%
October	<b>66.1%</b>	71.1%	62.8%	63.8%
November	53.5%	54.2%	43.2%	46.1%
December	<b>34.3%</b>	36.1%	33.7%	32.0%

The data reveals that December and January are typically the slowest months of the year. August is typically the highest with the exception of 2010, when July reported slightly higher that year. **It is also significant to note that in 2010, three months (April, May and July) all reported the highest monthly occupancy percentages over the last six years 2005 – 2010.**

The chart below provides a graphic illustration of the data in this table.

### FOUR-YEAR MONTHLY LODGING OCCUPANCY TREND

**CCOT LODGING ANALYSIS**



**OCCUPANCY BY DAY OF THE WEEK**

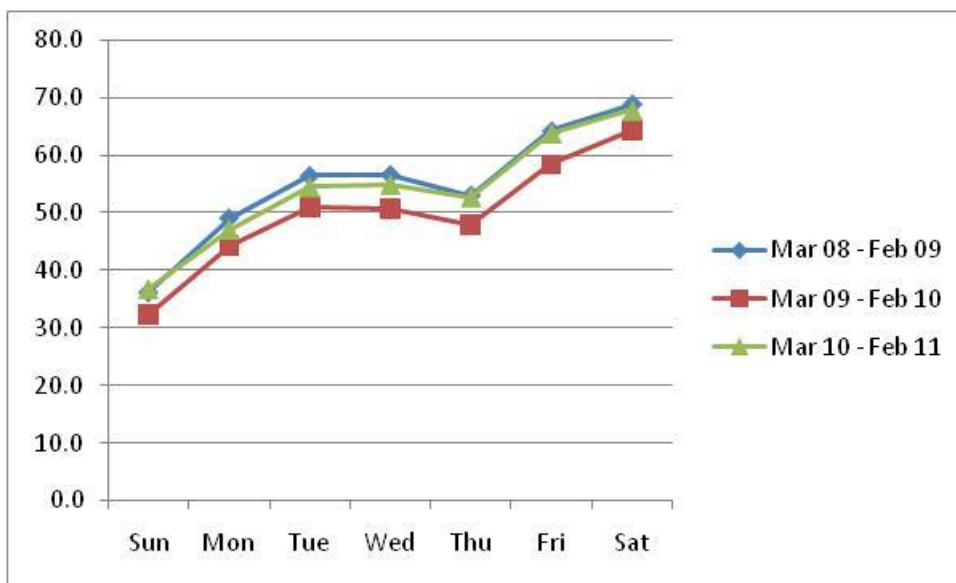
Smith Travel Research (STR) records the average occupancy by day of the week from the Cayuga County properties that report to STR.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
<b>Mar 08 - Feb 09</b>	36.1	49.0	56.4	56.6	53.0	64.2	68.9	54.9
<b>Mar 09 - Feb 10</b>	32.4	44.2	51.0	50.8	47.8	58.4	64.3	49.8
<b>Mar 10 - Feb 11</b>	36.7	47.1	54.5	54.9	52.7	63.8	67.8	53.9
<b>Total 3 Yr</b>	<b>35.0</b>	<b>46.8</b>	<b>54.0</b>	<b>54.1</b>	<b>51.2</b>	<b>62.1</b>	<b>67.0</b>	<b>52.9</b>

The chart below graphically illustrates that Friday and Saturday nights are consistently the busiest followed by Wednesday and Tuesday nights. Sunday and Monday nights are the slowest nights of the week in Cayuga County lodging properties.

This data again confirms the CCOT has an opportunity to benefit Cayuga County lodging and the local travel economy by selling the nights of the week with the lowest occupancy. This will require focused strategic thinking by the CCOT as these are traditionally the most difficult nights of the week to fill.

**THREE YEAR ANNUAL OCCUPANCY BY DAY OF THE WEEK**

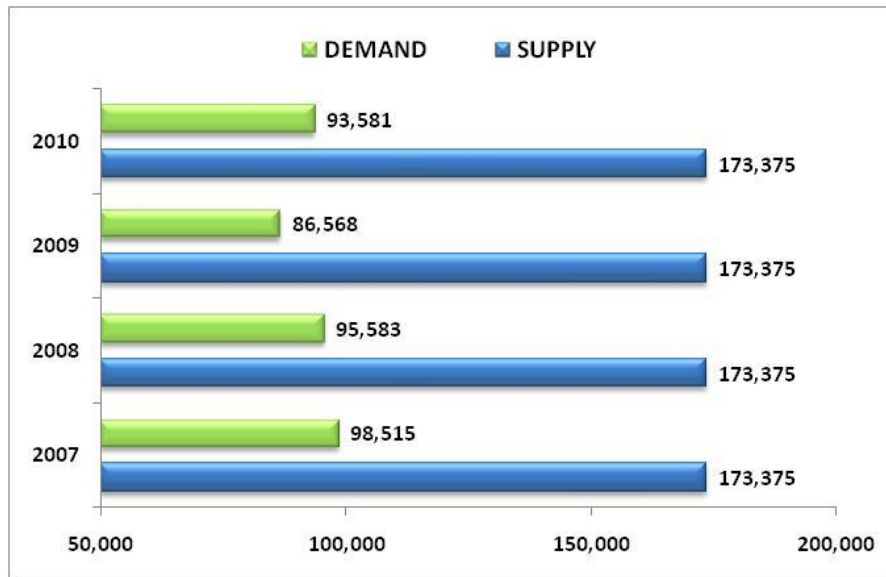


**LODGING SUPPLY AND DEMAND**

Cayuga County hotel/motel lodging supply has remained unchanged for nearly two decades. The last new hotel opened in April 1999. Demand however has fluctuated over the last six years with an overall decline of 12.4% from 2007 – 2009. **Cayuga County’s lodging industry experienced recovery in 2010, with an impressive increase in room demand of +8.1%.**

**FOUR-YEAR HOTEL/MOTEL ANNUAL SUPPLY & DEMAND TREND**

	Supply	% of	Demand	% of
<b>2007</b>	173,375	~	98,515	~
<b>2008</b>	173,375	0.0 %	95,583	-3.0%
<b>2009</b>	173,375	0.0 %	86,568	-9.4%
<b>2010</b>	173,375	0.0 %	93,581	+8.1%



**ADR AND REVPAR**

Overall, ADR (Average Daily Rate) for Cayuga County lodging changed very little over the last four-year period of 2007 to 2010. This is an impressive statistic for Cayuga County. When the economic crisis hit in 2008, many hoteliers across the County tried to adjust accordingly and began cutting rates. This in turn which caused extreme declines in their RevPAR, often in the double digits. Additionally, once rates have been lowered in an area, it can be very difficult to implement rate increases to the general traveling public even as the economy begins to recover.

The fact that Cayuga County hoteliers actually held their rates during this turbulent time means fewer backlashes for Cayuga County moving forward. Therefore, while RevPAR (Revenue Per Available Room) declined -10.1% during the two-year national economic recession of 2008 - 2009; **an increase in 2010's RevPAR of +7.7% is an excellent indication that an economic recovery is in place for Cayuga County because it directly resulted from increased demand for rooms.**

**FOUR-YEAR HOTEL/MOTEL ANNUAL ADR & REVPAR TREND**

	ADR	% of change	RevPAR	% of change
<b>2007</b>	\$83.73	~	\$47.58	~
<b>2008</b>	\$85.54	+2.2%	\$47.16	-0.9%
<b>2009</b>	\$85.75	+0.2%	\$42.82	-9.2%
<b>2010</b>	\$85.41	-0.4%	\$46.10	+7.7%



**LODGING ROOM REVENUE**

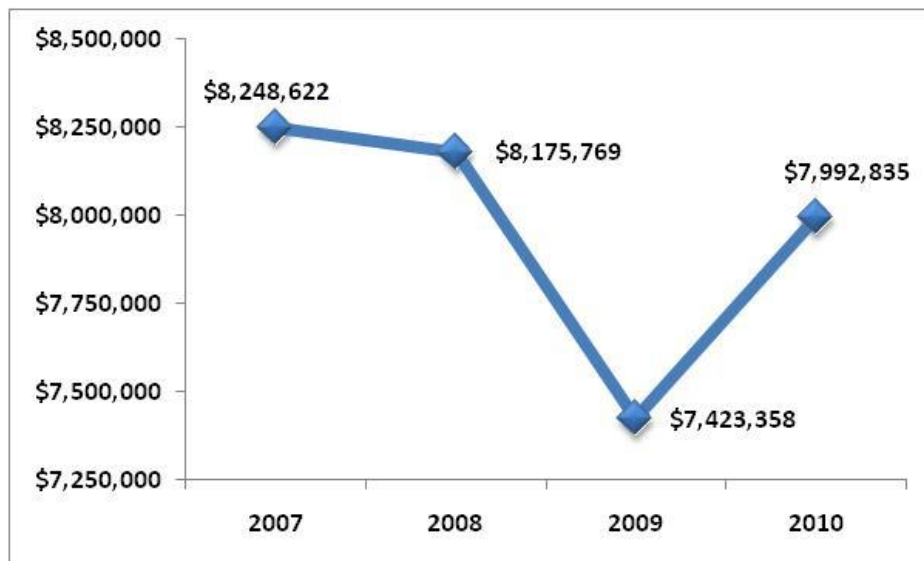
Smith Travel Research reports the total annual lodging revenue for Cayuga County, North York lodging since 2007 as follows in the table below.

**ANNUAL LODGING REVENUE**

Year	Lodging Revenue	% of change
2007	\$8,248,622	~
2008	\$8,175,769	-0.9%
2009	\$7,423,358	-9.2%
2010	\$7,992,835	+7.7%

Lodging revenue had a +7.7% increase in 2010; this is great news for Cayuga County because it came from increased demand for rooms! Average room rates were flat from 2009 to 2010. The chart below graphically illustrates the economic recovery beginning to happen in Cayuga County, as was predicted by many economists in the travel industry.

The data reveals lodging revenues fell in both 2008 and 2009 when the Cayuga County lodging market experienced a decline in lodging room demand of -12.4% in the same two-year time period. At the close of 2009, Smith Travel Research reported it as the worst year ever nationwide in modern hotel industry. Many economists were predicting at that time we would see an improvement in economic conditions beginning in 2010 and 2011. Cayuga County seems to be on the mark as predicted.



## RESEARCH PURPOSE

To document the profile of visitors to the County by segment, the size (universe) of the potential market from each of the identified visitor segments, the perceptions of the Cayuga region as a destination, and the attractors that induce overnight visitors, multiple night visitors and repeat visitors. Research will include those who have and have not visited the Cayuga area.

## RESEARCH METHODOLOGY

CCOT provided Young Strategies with a sample of the 15,000+ direct inquiry databases for calendar year 2010. An online survey invitation was emailed to **4,499** names and email addresses provided by the Cayuga County Office of Tourism as a sample of the total database. The invitation email included a link to an online survey. The surveys were emailed on Wednesday March 9, 2011. Reminder emails were sent to those who had not yet responded on March 21, April 4, and April 13.

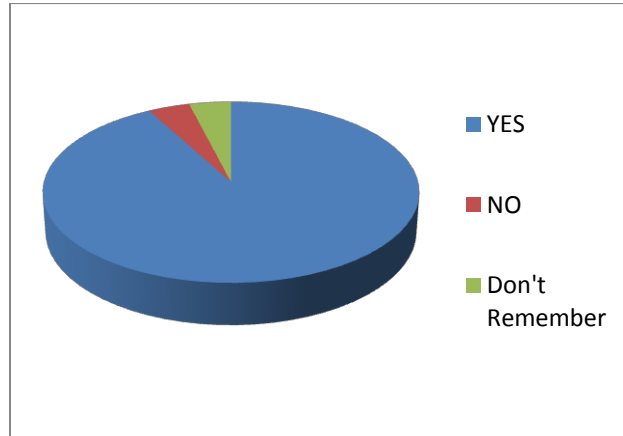
51 email addresses bounced, 77 opted out and **209 responded** from the 4,371 that were delivered successfully representing a **4.8% response rate**. This is an acceptable response rate and comparisons of the response data to previous surveys and national travel trend data verifies the validity of the responses herein.

## SUMMARY OF FINDINGS

- Data is consistent with and shows improvement over similar 2006 conversion survey.
- Demographic profile and point of origin are relatively unchanged. Increased response from Ohio is noted.
- Conversion of inquiries to visitors has improved from 36% in 2006 to 55% in 2010. Indicates success of fulfillment, quality of guide and the need to expand outreach.
- Length of stay increased from 2 nights to 2.3 nights with 26% day trippers. Overnighters averaged 3 nights.
- Average trip expenditures increased from \$775 to \$780
- Adults without kids remain the primary audience coming to Cayuga County for a relaxing weekend getaway among scenic beauty and wineries with unique shopping and dining. Lakefront lodging is highly desired.

**CCOT INQUIRY ONLINE SURVEY FINDINGS AND RESPONSES**

**1. Did you receive the Cayuga County visitor information you requested?**



RESPONSE	PERCENTAGE
YES	92%
NO	4%
Don't Remember	4%
n=	206

The majority of respondents indicated they remembered receiving the Cayuga County visitor information that was sent. This confirms the respondents are answering the survey based on the information they received from the Cayuga County Office of Tourism. A 92% affirmation is very good and indicates the data is very reliable.



**CCOT ONLINE SURVEY ANALYSIS**

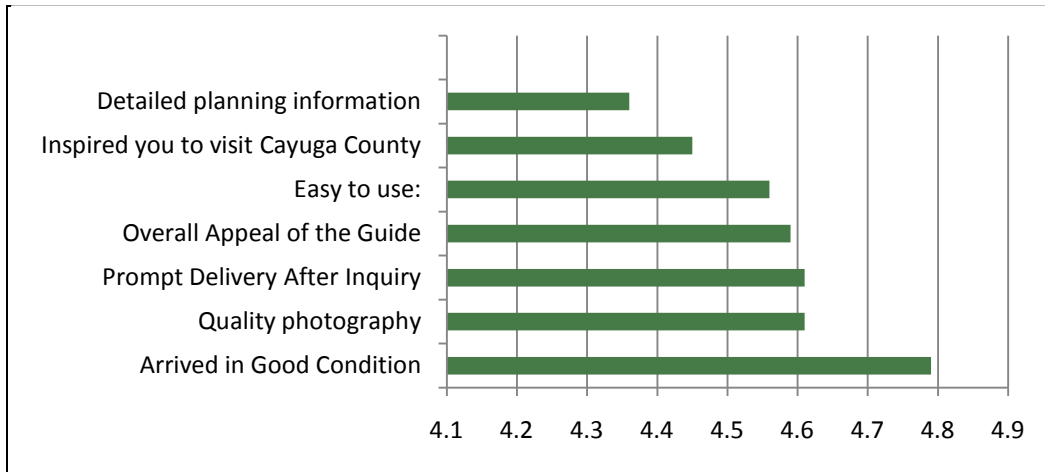
**2. Where did you find Cayuga County visitor information? Magazine or newspaper, travel guide, an internet source, tourism information center or consumer tradeshow. N=172.**

SOURCE	RESPONSE %	RESPONSE N =
www.fingerlakes.org	41%	70
www.visitcayuga.com & www.tourcayuga.com*	36%	62
Finger Lakes Travel Guide	28%	49
CCOT Visitors Guide	23%	39
I Love NY Travel Guide	19%	33
Travel Feature Stories	12%	20
NY State Thruway Info Centers	11%	19
Life in the Finger Lakes	10%	17
AAA Car & Travel	10%	17
www.ilove.ny.com	8%	14
Newspaper Ads	8%	13
Best of Routes 5&20 Guide & Map	5%	8
www.routes5and20.com	4%	7
www.GetawayNewYork.com	4%	7
Better Homes & Gardens	3%	6
New York State Fair	3%	6
New York Times	3%	5
Family Circle	2%	4
CAA Magazine	2%	4
Gateway Visitor Info Center (Route 81)	2%	4
Fingerlakes Mall	2%	4
Girlfriend Getaways – Budget Travel	2%	3
Finger Lakes Hunting & Fishing Guide	2%	3
Auburn History’s Hometown Brochure	2%	3
AAA Show	2%	3
Midwest Living	2%	2
Outdoor/Sports/Travel Show	2%	2
New York Times Show	2%	2
Cycling the Erie Canal	2%	2
www.historyshometown.com	2%	2
Gateway Information Center-Binghamton	2%	2
Ladies Home Journal	1%	1
The Citizen – Go & Do	1%	1
Canal Connections	1%	1
AAA e-journeys	1%	1
NYS Gateway Center-1000 Islands	1%	1
Chautauqua Lake Rest Area-I86 Eastbound	1%	1

The following options were not selected by any survey respondents: Journey Magazine, People Magazine, Great Vacation Getaway Insert, Toronto Travel Show, Adventures in Travel Expo, Petro Service Station Tourist Info, Preble Info Center. Frequent “Other” responses included: Internet – 16, Google – 10; Cayuga County Wine Trail – 3, friend – 3, e-mail – 2.

*The overall responses indicate success for the CCOT advertising program with CCOT website ranked second and visitor guide ranked 4<sup>th</sup> which is excellent.*

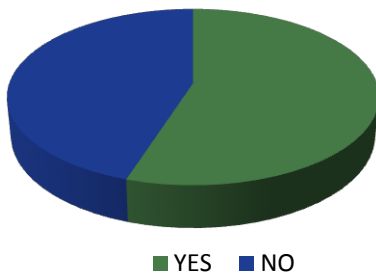
3. Please rate the following aspects of the Cayuga County Visitor Guide on a scale of 1 to 5 where 5 is excellent, 3 is average and 1 is poor.



Cayuga County Visitor Guide	Average Rating
Arrived in Good Condition	4.79
Quality photography	4.61
Prompt Delivery After Inquiry	4.61
Overall Appeal of the Guide	4.59
Easy to use	4.56
Inspired you to visit Cayuga County	4.45
Detailed planning information	4.36

*The ratings are very high and indicate excellent satisfaction levels with the Cayuga Visitors Guide.*

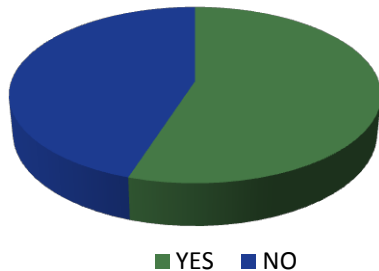
4. Had you ever traveled to or through Cayuga County BEFORE you requested the visitor information from Cayuga County?



RESPONSE	PERCENTAGE
YES	56%
NO	44%
n=	169

*The responses indicate high repeat visitation with 56% having visited Cayuga prior to requesting information. This indicates the need to broaden marketing to reach more potential first time visitors.*

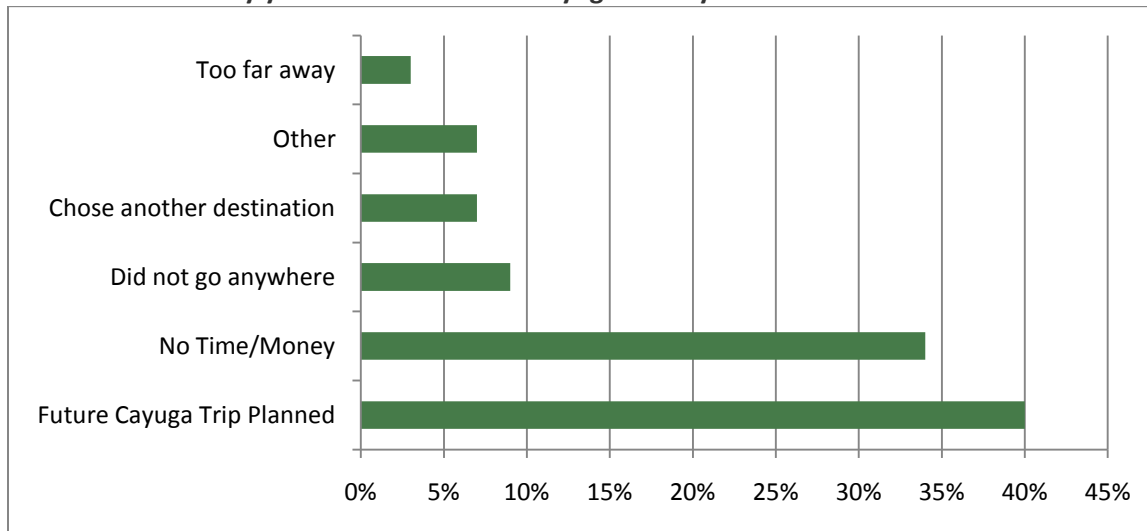
**5. Did you travel to Cayuga County AFTER you requested the visitor information from Cayuga County?**



RESPONSE	PERCENTAGE
YES	55%
NO	45%
n=	170

*Over half of survey respondents (55%) converted to actual visitors after receiving the CCOT information packet to fulfill their inquiry. This is too high as the result of very conservative advertising by CCOT in 2010, as the result of reduced funding from State of NY grants. Expanded advertising in 2011/12 will drive increased inquiries at a lower conversion rate which will result in increased visitation for the County.*

**6. Please tell us why you chose not to visit Cayuga County.**



	PERCENT
Future Cayuga Trip Planned	40%
No Time/Money	34%
Did not go anywhere	9%
Chose another destination	7%
Other	7%
Too far away	3%
n=	68

**6a. List any destination you may have visited instead.**

Responses included other New York destinations, other cities within the Finger Lakes, Florida, Maryland, Maine, Nashville, Pennsylvania, Washington DC and Turkey.

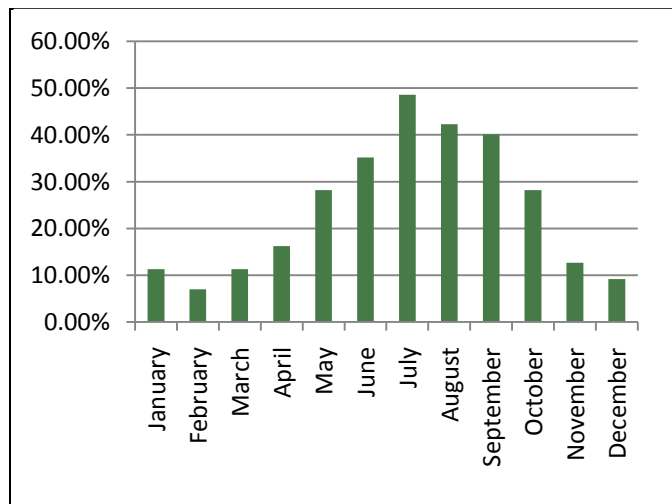
**7. How many times have you visited Cayuga County in the last three years?**

RESPONSE	PERCENTAGE
None	30%
One	31%
Two	13%
Three	6%
Four	3%
Five	3%
Six or More	14%
n=	182

*Over half of survey respondents had visited Cayuga before with the majority of those making repeat visits. This is again an indication of conservative advertising in 2010 targeted at those most likely to come and indicates the need for expanded outreach to new markets and demographics in the future as funding is expanded.*

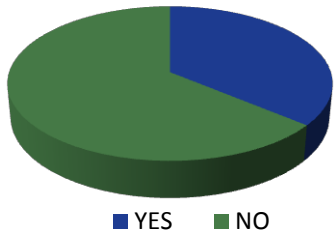
**8. Please indicate the months in which you have visited Cayuga County.  
 (Choose all that apply)**

Months	Percent
January	11.30%
February	7.00%
March	11.30%
April	16.20%
May	28.20%
June	35.20%
July	48.60%
August	42.30%
September	40.10%
October	28.20%
November	12.70%
December	9.20%



As expected the summer months of June, July and August see the highest levels of visitation to Cayuga County. This is followed very closely by the month of September which also proves to be a popular time to travel to Cayuga County, most likely to enjoy fall foliage.

9. For your last trip to Cayuga County, did you use the website [www.tourcayuga.com](http://www.tourcayuga.com) for planning or making reservations, etc.?

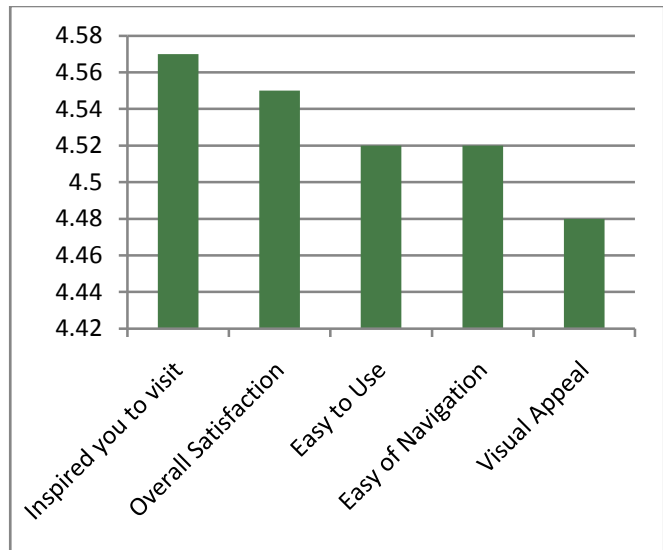


RESPONSE	PERCENTAGE
YES	36%
NO	64%
n=	92

Of those that visited Cayuga County, slightly more than one-third indicated they used the [www.tourcayuga.com](http://www.tourcayuga.com) website for planning or making reservations.

10. Please rate your opinion of each aspect of the website [www.tourcayuga.com](http://www.tourcayuga.com) on a scale of 1 to 5 (where 5 is excellent, 3 is average and 1 is poor).

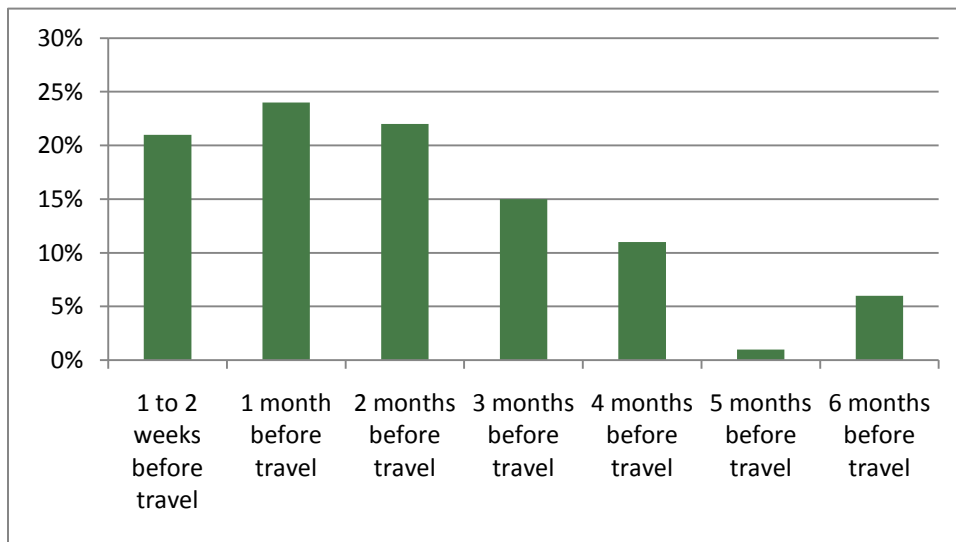
	AVERAGE RATING
Inspired you to visit	4.57
Overall Satisfaction	4.55
Easy to Use	4.52
Easy of Navigation	4.52
Visual Appeal	4.48



Overall, the various features of the Cayuga County Office of Tourism website rated highly.

**11. How far in advance did you plan your most recent trip to Cayuga County, NY?**

Answer Options	Response Percent
1 to 2 weeks before travel	21%
1 month before travel	24%
2 months before travel	22%
3 months before travel	15%
4 months before travel	11%
5 months before travel	1%
6 months before travel	6%
n =	86



Nearly half (45%) of the respondents to this question indicated they planned their travel to Cayuga less than a month prior to travel.

*This is consistent with findings from various industry studies that show trip planning time has been significantly shorter in recent years. Therefore it is critical for CCOT to fulfill inquiries with rapidity to make sure the information is delivered to the inquirer before they leave for their travels!*

**12. How many nights did you stay in Cayuga County on your most recent visit?**

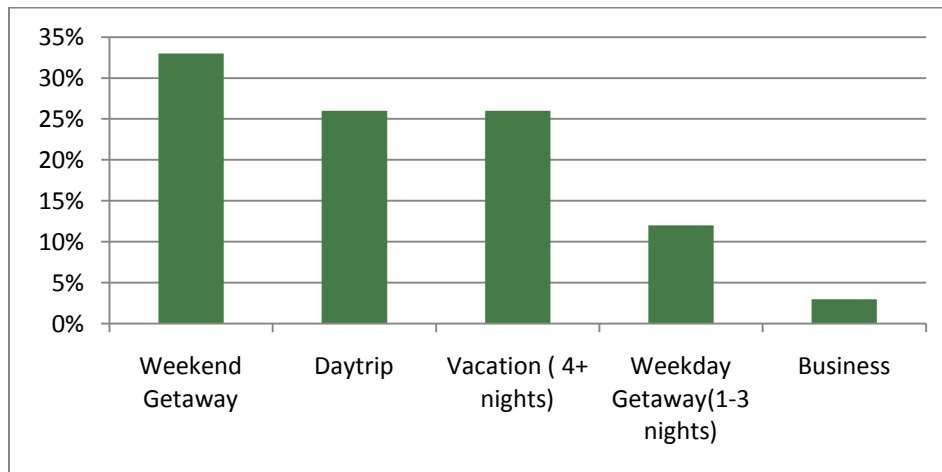
NUMBER OF NIGHTS	
Overall Average	2.3
Overnight Only	3.1
Daytrippers =	26%

The responses herein reveal a slightly longer length of stay from what was reported in the 2006 study (2 nights). As Cayuga County promotes and develops more activities for travelers the length of stay should continue to increase.

**13. How would you categorize your most recent trip to Cayuga County?**

	PERCENT
Weekend Getaway	33%
Daytrip	26%
Vacation ( 4+ nights)	26%
Weekday Getaway(1-3 nights)	12%
Business	3%
n =	89

Cayuga County is most popular as a weekend getaway followed by longer stays of 4+ nights. There is excellent potential to drive increased weekday getaways among retirees while promoting weekends to younger generations who are still employed and less likely to travel on weekends.



**14. What was the major purpose of this trip to Cayuga County?**

	PERCENT
General Relaxation	17%
Visit a Winery	13%
Visiting Friends and Relatives	13%
Shopping	8%
Romantic Getaway	8%
Festival Event	6%
Overnight Part of a Longer Trip	3%
University/College Related	3%
Visit a Museum	2%
Trip for Women Only	2%
Business	2%
Attend Sports Event	1%
Reunion	1%
Racing	1%
Boating	1%
Hunting or Fishing	1%
Meeting/Convention	1%

Here we see solid confirmation that Cayuga County is a leisure destination appealing to people who come for relaxation, wineries, visiting friends and relatives as well as shopping, romance, events and activities.

*Future promotions should emphasize that Cayuga County is a relaxing place to have as much or as little activities as a travel party wants.*

**15. What type of lodging did you use most during your last visit to Cayuga County?**

HOTEL/MOTEL	RESPONSE
Hotel/Motel	51%
Bed & Breakfast Inn	14%
Friends/Family House	14%
Vacation Rental	11%
Campground/Campsite/RV	10%
n =	77

Hotels and motels (86% of Cayuga lodging inventory) are currently used most often by travelers followed by bed and breakfast inns and local houses.

**16. What mode of transportation did you use to get to and around Cayuga County?**

MODE OF TRANSPORTATION	PERCENT
Automobile	86%
RV Camper	3%
Motor Coach/Bus	0%
Motorcycle	4%
Bicycle	0%
Fly/Drive	7%
n =	91

Cayuga County is solidly a drive destination with less than 10% of fly/drive travel. This trend can be expected to continue as airline prices escalate. Travelers continue to drive in spite of the price of gasoline and Cayuga County has 20 million plus potential visitors within a 6 hour drive.

**17. How many were in your immediate travel party?**

TRAVEL PARTY	PERCENT
Adults Only	72%
Traveling with Children	28%
Traveled with Pets	14%
n =	90

The data herein exactly matches national leisure travel statistics wherein 2/3 to ¾ of leisure travel parties are adults traveling without children. Cayuga County has excellent potential for growth among adult travel parties who enjoy all that Cayuga County offers from wineries, scenic beauty, theater, arts, history, dining and shopping.



**18. How much did your party spend while in Cayuga County?**

2010	OVERALL	DAYTRIPPERS	OVERNIGHTERS
Lodging	\$298.14 n=78	\$0.00 N= 20	\$395.81 n=58
Food Meals	\$175.33 n=76	\$54.00 n=20	\$217.32 n=56
Shopping	\$123.15 n=75	\$43.65 n=20	\$157.09 n=55
Wineries	\$76.73 n=74	\$52.25 n=20	\$86.60 n=54
Auto Fuel	\$74.59 n=75	\$36.00 n=20	\$88.36 n=55
Attractions	\$32.15 n=75	\$9.85 n=20	\$41.20 n=55
<b>Average Spending</b>	<b>\$780.10</b>	<b>\$195.75</b>	<b>\$986.38</b>

The above table presents the typical travel party spending patterns for those that converted to a visit to Cayuga County after receiving the inquiry fulfillment information from the Cayuga County Office of Tourism. The data shows slight growth in spending over the 2006 research study spending. Given the 2010 economy that is represented in this survey spending pattern we are pleased to see slight improvement over 2006. Cayuga County is driving a higher conversion rate and increased spending in each travel party which is a very positive trend in a bad economy.

DISCRETIONARY CATEGORY	EXCLUSIVE SPENDING	(N)
Food meals	\$180.14	<b>73</b>
Shopping	\$165.69	<b>55</b>
Wineries	\$126.18	<b>45</b>
Auto Fuel	\$81.18	<b>68</b>
Attractions/Events	\$65.19	<b>36</b>

The above figures are for those who visited Cayuga County and indicated a positive spending amount in each category above (\$0 spending removed). As an example, those that reported spending at wineries spent an average of \$126.19, however the average winery spending when factoring in those that spent nothing is \$76.73 as seen in the top table.

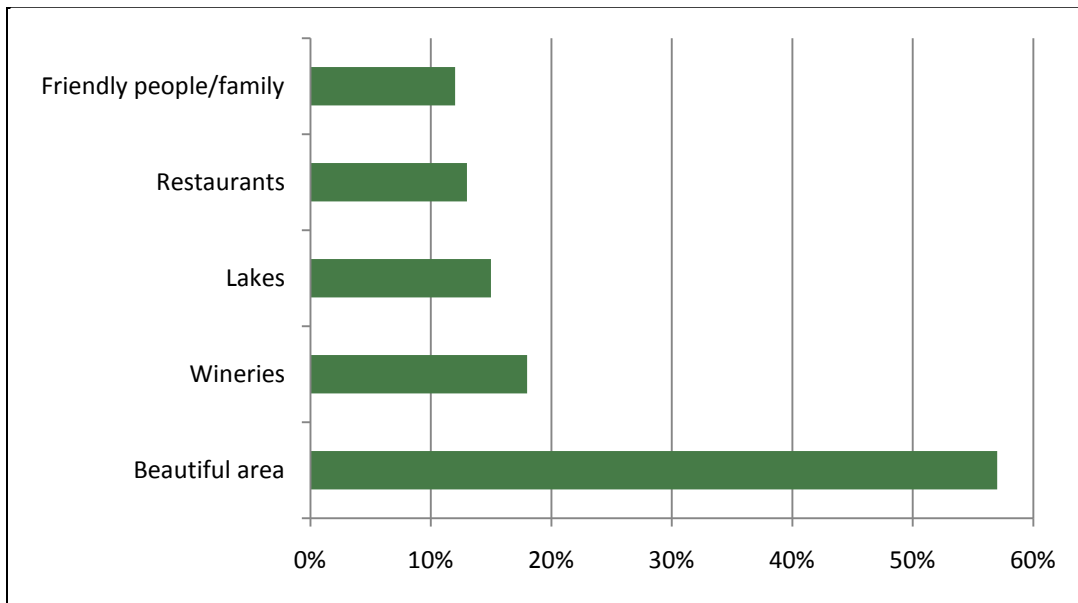
*Overall, the spending data is encouraging and indicates potential for growth in the discretionary categories particularly attractions/events as the theater festival comes on line.*

**19. Overall, how would you rate your visit to Cayuga County on a scale of 1 to 5 where 5 is excellent, 3 is average and 1 is poor.**

	PERCENT
5 - Excellent	60%
4 -	33%
3 - Average	7%
2 -	0%
1 - Poor	0%
<b>Average Rating</b>	<b>4.50</b>

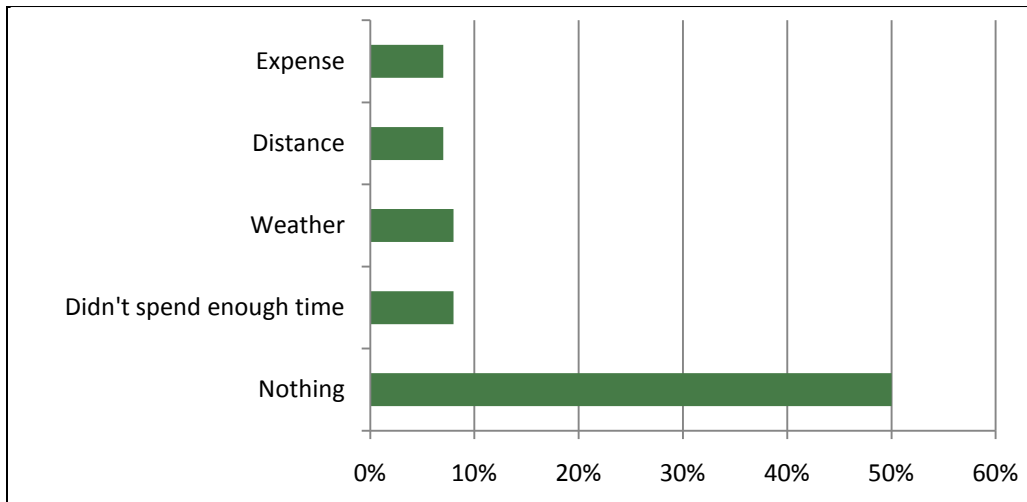
The overall rating of 4.5 is one of the highest that the research team has seen for a destination and will be hard to improve upon so the challenge will be to maintain it.

**20. What did you like most about your visit to Cayuga County?**



The majority of those who visited Cayuga County appreciate the scenic beauty, lakes and wineries most of all. Future research will hopefully identify more likes that set Cayuga apart as a unique destination in the Finger Lakes. Theater and the creative arts as well as unique towns should be mentioned more often. Unedited verbatim comments in response to this question are provided at the end of this section.

**21. What did you dislike about your visit to Cayuga County?**



Those who visited Cayuga County had few dislikes other than weather and cost which are mentioned most often in all similar surveys. Unedited verbatim comments in response to this question are provided at the end of this section.

**22. Following is a list of towns/attractions/events in Cayuga County. Please rate each that you visited on a 5 point scale where (5 is excellent, 3 is average, and 1 is poor). Indicate N/A if you did not go there.**

TOWNS/ATTRACTIONS/EVENTS	RATING	RESPONSE COUNT
<b>Wine Trails and Tours</b>	<b>4.6</b>	<b>n = 55</b>
<b>State/County Park</b>	<b>4.5</b>	<b>n = 53</b>
<b>Auburn</b>	<b>4.1</b>	<b>n = 52</b>
Fingerlakes Mall	3.9	n = 36
Bass Pro Shops	3.7	n = 30
<b>Aurora</b>	<b>4.2</b>	<b>n = 29</b>
<b>Montezuma National Wildlife Refuge</b>	<b>4.3</b>	<b>n = 23</b>
<b>Seaway Trail</b>	<b>4.1</b>	<b>n = 19</b>
<b>Seward House</b>	<b>4.7</b>	<b>n = 18</b>
<b>Harriet Tubman Home</b>	<b>4.3</b>	<b>n = 18</b>
<b>Mackenzie-Childs, Ltd</b>	<b>4.4</b>	<b>n = 18</b>
<b>Merry-Go-Round Playhouse</b>	<b>4.3</b>	<b>n = 18</b>
<b>King Ferry Winery</b>	<b>4.9</b>	<b>n = 17</b>
<b>Route 90 50 Mile Garage Sale</b>	<b>4.1</b>	<b>n = 16</b>
<b>Sterling Renaissance Festival</b>	<b>4.7</b>	<b>n = 16</b>
Fair Haven Village	3.8	n = 11
TomatoFest	3.4	n = 7
Auburn Public Theatre	4.2	n = 6
Auburn Doubledays Baseball	4.3	n = 4
The Great Race	4.3	n = 3
Fishing Tournament	2.5	n = 2

Respondents were provided with a list of Cayuga County towns, attractions and events and asked to rate those that they visited while in the area. The overall ratings were very high with a significant drop among those not as appreciated as the others.

Emphasis should be placed by the community on those attractions, retail and events that did not rate above a 4.0 to create an improved experience that will drive increased spending in the future.

**23. How many wineries did you visit in Cayuga County?**

# OF WINERIES	PERCENT
None	29%
One	14%
Two	20%
Three	15%
<b>Four or More</b>	<b>22%</b>

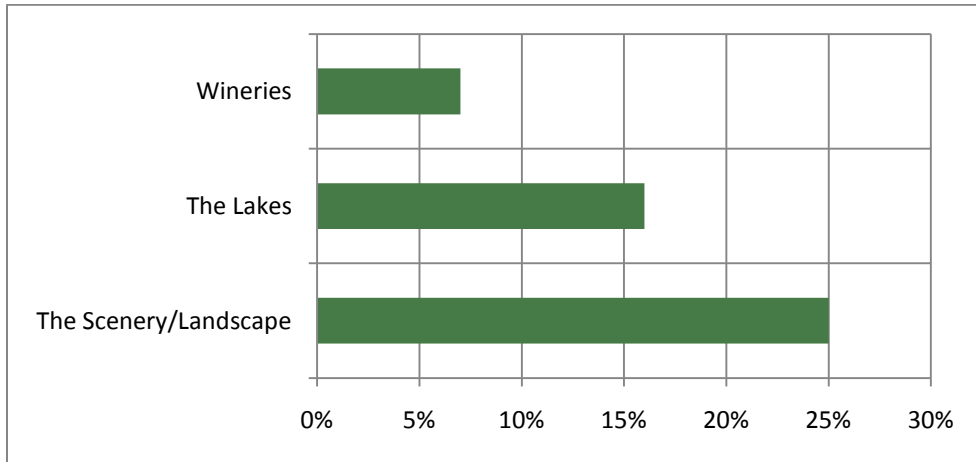
Slightly less than 1/3 of those who visited Cayuga County after receiving the CCOT visitor guide visited no wineries while 2/3 did visit at least one or more wineries indicating that the CCOT marketing materials are doing a good job of promoting wineries and that wineries appeal to potential visitors. *Wineries are now operating in all 48 contiguous U.S. states so Cayuga County wineries must continually improve the experience to remain competitive.*

**24. Following is a list of amenities offered in Cayuga County. Considering this visit, please rate each amenity on a 5 point scale (where 5 is Excellent, 3 is Average, and 1 is Poor). If you did not participate in any of the activities please check "N/A". Check one rating for each.**

AMENITIES	RATING	RESPONSE COUNT
<b>Quality of Wine</b>	<b>4.51</b>	<b>n = 78</b>
<b>Quality of Wine Experiences</b>	<b>4.48</b>	<b>n = 77</b>
<b>Quality of Outdoor Experiences</b>	<b>4.47</b>	<b>n = 81</b>
<b>Quality of State Parks</b>	<b>4.45</b>	<b>n = 76</b>
Overall Appeal of the Attractions in the area	4.29	n = 79
Quality of Lodging	4.19	n = 76
Level of service/employee training	4.18	n = 76
Quality of Food	4.17	n = 80
Ease of finding Visitor Information	4.11	n = 79
Lodging Value you received for the price paid	4.10	n = 77
Variety of Children's Activities	4.07	n = 67
Variety of Shopping & Merchandise	4.03	n = 79
Range of choices for Dining	3.97	n = 78
Signage and Wayfinding	3.97	n = 76

The ratings for amenities in Cayuga County are very good to excellent with only two categories dropping below the desired 4.0 level. Both of these categories (dining choices and wayfinding) can be improved upon as many new dining options have opened in recent years indicating the need for better promotion and signage to help travelers find their way.

**25. What do you think makes Cayuga County unique or distinct from other destinations?**



The research team had hoped this open ended question would identify some characteristics that would set Cayuga County apart from the other counties in the Finger Lakes region. *Every county within the Finger Lakes could promote these same attributes indicating the need for Cayuga County to develop and promote products that will complement these attributes and extend into a unique brand for the County.*

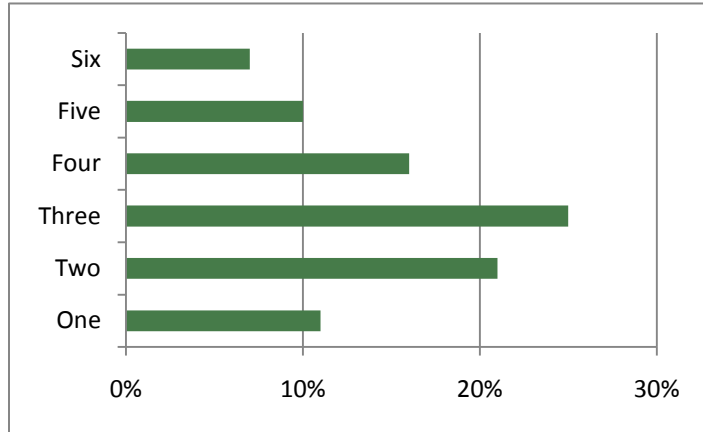
**26. What type of activities/products would you appeal to you if offered in Cayuga County?**

ACTIVITY	PERCENT	RESPONSE
Lake view Lodging	76%	n = 89
Public Displays of Local Art	44%	n = 51
Summer Long Theatre Festival	34%	n = 40
Auburn Wine Tasting Center	32%	n = 38
Culinary/Wine School	32%	n = 40
Downtown Boutique Hotel	21%	n = 25

All of these ratings are impressive with the response to lake view lodging being off the charts. It is important to note that the term is “lake view” and not “lake front”. Travelers are always attracted to water views as indicated herein. The other four most mentioned desired new products are all contribute to a creative arts lifestyle community (public art, summer theater festival, wine tasting center and culinary wine school).

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

# OF NIGHTS	PERCENTAGE
One	11%
<b>Two</b>	<b>21%</b>
<b>Three</b>	<b>25%</b>
Four	16%
Five	10%
Six	7%
Seven	0%
Eight or More	11%
n =	148



The above data reveals respondents to the survey are frequent travelers who take many getaways during a year which bodes well for Cayuga County.

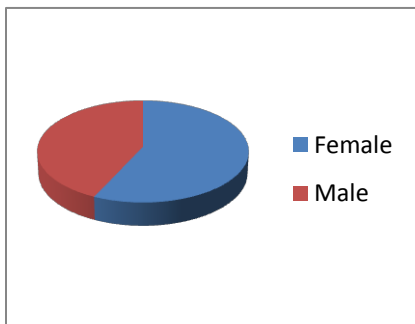
**Demographic Information**

**Age:**

Generational Group	Age Range	ALL RESPONDENTS	CONVERTED RESPONDENTS
Millennium Generation	9-27	3%	2%
Generation X	28-48	19%	15%
Baby Boomers	49-66	64%	71%
Silent Generation	67-84	13%	12%
War Generation	85+	1%	0%
<b>AVERAGE AGE</b>		<b>54.2</b>	<b>54.9</b>

The response data in the above table reveals that the CCOT marketing materials did a better job of converting Boomers than GenX indicating *the need for future marketing materials to appeal more to the GenX demographic while not alienating the Boomers.*

**Gender:**

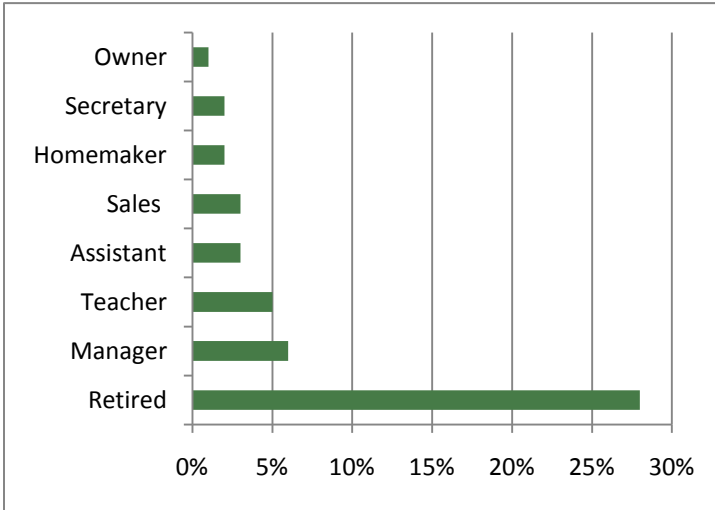


Female	57%
Male	43%

All respondents and those respondents who converted to a visit to Cayuga County were divided on similar gender lines: 57% female, 43% male.

**CCOT ONLINE SURVEY ANALYSIS**

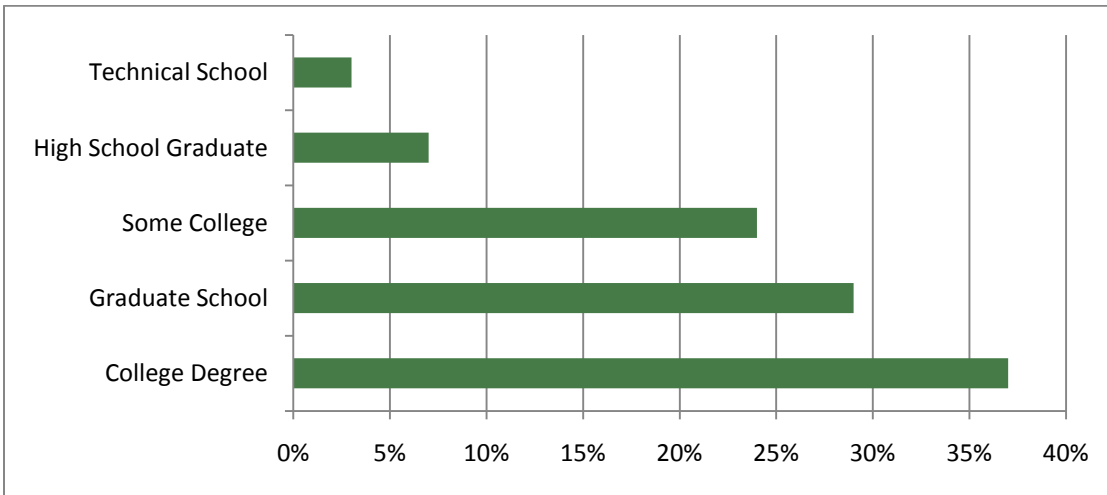
**Occupation**



	PER CENT	RESPONSE
Retired	28%	42
Manager	6%	10
Teacher	5%	8
Assistant	3%	5
Sales	3%	5
Homemaker	2%	4
Secretary	2%	4
Owner	1%	3

Respondent occupations reflect their age, gender and education (as seen below) with many retirees and professionals.

**Level of Education**



	RESPONSE %	RESPONSE COUNT
College Degree	37%	57
Graduate School	29%	45
Some College	24%	37
High School Graduate	7%	11
Technical School	3%	5

Respondents are well educated which matches typical profiles of the traveling public and prior research studies of travelers to Cayuga County and the Finger Lakes region.

**Respondent Point of Origin**



**New York (52)**

- Albany
- Ancram
- Armonk
- Auburn
- Baldwinsville
- Binghamton
- Brooklyn
- Buffalo
- Camillus
- Canandaigua
- Cooperstown
- Cortland
- Farmingdale
- Fulton
- Gates
- Geneseo
- Greenport
- Halfmoon
- Hamburg
- Honeoye Falls
- Ilion
- Jamestown
- Lake Luzerne
- Lincolndale
- Liverpool
- Liverpool
- New York City (4)
- North Chili
- North White Plains
- Northport
- Norwich

- Oswego (2)
- Potsdam
- Preble
- Rochester
- Sherburne
- Syracuse (3)
- Utica
- Vestal
- W. Irondequoit
- Washington
- Weedsport
- Windsor (2)
- Yorktown Heights

**Pennsylvania (25)**

- Berwick
- Dallas
- Duncannon
- Emmaus
- Emmaus
- Emmaus
- Harleysville
- Hellertown
- Jackson
- Lake Ariel
- Lebanon
- Lewistown
- Linfield
- Monroeville
- Muncy Valley
- Nanticoke
- Pennsburg
- Philadelphia (2)
- Plains
- Shickshinny
- Stockertown
- Waymart
- Wellsboro

**Canada (14)**

- Gatineau Quebec
- Guelph, Ontario
- Kingston, Ontario
- London, Ontario
- Loughborough
- Mississauga
- Mt. Hope, ON
- Orléans, Ontario
- Ottawa, Canada (2)
- Port Dover, Ontario
- Quebec City
- Toronto
- Welland, Ontario

**Ohio (12)**

- Akron
- Chardon
- Cleveland
- Cuyahoga Falls
- Findlay
- Hudson
- Miamisburg
- Monclova
- Perrysburg
- Streetsboro
- West Chester
- Xenia

**New Jersey (7)**

- Belleville
- Brick
- Cream Ridge
- Jersey City
- Montclair
- Neptune
- West Orange

**California (6)**

- Cardiff
- Poway
- San Diego
- San Marino
- San Mateo
- Ventura

**Florida (4)**

- Crystal River
- Hillsboro Beach
- Pensacola Bch
- Tampa

**Massachusetts (4)**

- Boston
- Norton
- Saugus
- Yarmouthport

**Illinois (3)**

- Chicago
- Momence
- Naperville

**Maryland (3)**

- Middletown
- Randallstown
- Westminster

**Connecticut (3)**

- Westport
- Woodbury

**Rhode Island (3)**

- Cumberland
- Portsmouth
- Providence

**South Carolina (2)**

- Florence
- Ladson

**Texas (2)**

- Grapevine
- Houston

**Virginia (2)**

- Dublin
- Williamsburg

**Alabama (1)**

- Huntsville

**Iowa (1)**

- Adel

**Kentucky (1)**

- Lexington

**Louisiana (1)**

- Lafayette

**Oregon (1)**

- Wasco

**Washington (1)**

- Olympia

**France (1)**

- Paris

**PAKISTAN (1)**

- Lahore, Punja



ADDENDUM – UNEDITED VERBATIM COMMENTS

20. What did you like most about your visit to Cayuga County? (VERBATIM RESPONSES)

- a beautiful area
- ambiance of area
- Atmosphere
- beautiful area to visit
- beautiful country
- beautiful scenery
- beautiful scenery
- beautiful scenery
- beautiful scenery
- Beautiful scenery
- calm and relaxing
- clean
- clean town
- Countryside
- general ambiance
- Great scenery
- Loved the scenery and fresh air
- natural beauty
- nice air and landscape
- Nice country scenery
- nice place to visit
- nice view
- Peacefulness
- relaxed pace
- scenery
- scenery
- Scenery
- scenery
- Scenery
- scenery
- scenery
- Scenery
- scenery
- scenery
- Scenery
- scenery
- scenery
- scenery
- scenery
- scenery
- scenery
- scenery
- scenery
- scenery at the parks
- Scenery. Love the lakes.
- Scenic,shopping,relaxing
- Temperature
- The beauty
- the drive and scenery
- The overall atmosphere
- views
- Scenery around the lakes
- close to home
- Route 5 and Route 20 roads in good shape for motorcycling
- Hiking
- hiking
- hiking in the parks
- Pet friendly hiking
- visited state park and hiked
- The History
- Boating
- Boating on Cayuga lake
- Cayuga Lake
- Finger Lakes
- GORGES
- Lakes
- Lakes
- Pretty lake views
- the lake
- Dinner on Cayuga Lake (Seneca Falls)
- Friendly atmosphere.
- friendly people
- Friendly People
- great people
- nice people
- nice people
- people were friendly
- the people
- visiting family
- Visiting friends
- Bed and Breakfast
- great inns and B & B 's
- places to stay
- activities
- dining out
- Enjoyed the restaurants we visited
- food
- nice places to eat and relax
- pizza
- places to eat
- Pumpkin Hill Bistro
- Restaurants
- restaurants
- unique taverns
- antiquing
- Shopping
- shopping and garage sale
- Shops
- attractions
- Christmas in Aurora Event
- Enjoyed the play
- faire
- Family friendly places to visit
- filmore glen state park
- Fitzgerald limo service
- Free activities! We're there!
- Plus we spend when we eat,
- for gas, shopping...
- little towns
- lots to visit and do
- many different interesting
- things to do
- museums
- Nancy Crow exhibit in Auburn
- sight seeing
- sightseeing
- state parks
- the Parks
- Fall Colors
- all the different wines available
- for tasting
- a lot of wineries
- Different food & wine choices
- farms and wineries
- Quality wine and food
- visiting the wineries
- wine
- wine
- wineries
- Wineries
- Wineries
- wineries
- Wineries
- Winery
- winery
- winery tour
- WINERY TOURS
- wineries
- ease of getting around
- easy to get around
- Everything
- good roads
- Love Seward's House,
- Cayuga County Museum, Farmer's Museum
- Visiting my alma mater (Cornell)

**21. What did you dislike most about your visit to Cayuga County? (VERBATIM RESPONSES)**

- easy to get lost!
- everything was far from where we stayed
- expensive restaurants
- Harriet Tubman's was closed.
- Having to pay for tastings and not getting a credit for buying wine
- Heavily solicitous tourism industry
- it rained one day
- It was cooler than I had expected
- LACK OF FRIENDLY PARKING ON CAMPUS
- Liked it al
- Little for vegetarians and vegans to do
- (other than visit veggie friends in the region)
- lodging
- McKenzie Childs didn't stay open late
- my visit was too short
- n/a
- N/A
- N/A
- N/A
- NA
- NA
- NA
- none
- none
- None
- none
- Not enough young people
- not many tourist centers for information on the way
- not sure..
- nothing
- nothing
- nothing
- nothing
- nothing
- Nothing
- nothing
- nothing
- nothing
- Nothing - it was great
- nothing i can think of
- Nothing to dislike
- our accommodations
- Parking kiosk
- rain
- Reservation signs along highway - what's that about?
- shows were not always going on when I was visiting
- smoky from Canada fires
- some areas were run down
- some driving directions were confusing and got lost
- Some hours of operation for some places visited
- The drive from Philadelphia! :-)
- the expense of each wine tasting
- The restaurants are pitiful
- There is really nothing I dislike about Cayuga County.
- There's nothing to do
- too short a visit
- Waiting for our table to be ready
- weather was rainy for half of trip
- wish I lived closer to Cayuga
- Women's museum was closed sun morning

**25. What do you think makes Cayuga County unique or distinct from other destinations?  
(VERBATIM RESPONSES)**

- A variety of scenic & historic sites. Lots of shopping (malls, villages, etc). Good restaurants in Auburn and around the area.
- ambiance of environment
- beautiful lakes
- beautiful scenery
- Beauty
- Cayuga Lake (2)
- (and my vegetarian and vegan friends who live there)
- Cayuga Lake and scenery
- charming atmosphere
- clean city, people are friendly, winery are fun to visit,
- the garage sale are great
- Did not request.
- Ease of obtaining visitor information; unique beauty
- easy to get to from where we live
- easy to get too
- Finger lakes (2)
- finger lakes and lake Ontario.
- Finger Lakes Atmosphere
- finger lakes is unique
- finger lakes, wineries, beautiful NY state
- friendly & a good value
- Friendly people, price, local foods used in food preparations,
- great variety of places and sights
- Has a home/small-town feeling, (I do have relatives there), museums, parks, plenty of places to eat, theaters, would like to know more about winery tours if free.
- Haven't been there yet! I checked places where we want to visit.
- history and physical beauty
- I have a lot of family here!
- I just wanted my family to see there was more to New York than NYC
- It just is
- it was great
- It's location in the finger lakes region
- It's many lakes
- lake and beautiful countryside
- Lakes
- Lakes, scenery
- Lakes/Wineries
- lakeside accommodations, scenic views
- Lakes-wineries
- Location (3)
- location scenic travel
- Merry-Go-Round Theater and Emerson Park
- multiple wineries
- museums
- NA (2)
- natural areas well preserved
- Not sure. I liked it.
- nothing in particular
- number of wineries in close proximity
- Quiet and laid back
- quiet and no commercial vendors
- Quite countryside.
- Scenery (2)
- SCENERY WINERIES
- Scenic and relaxing plenty of places to shop
- small town appeal and nice people
- The Finger Lakes (3)
- The friendliness of its people
- the geological history
- The History
- the laid back feeling you get in the whole area
- The lake is certainly special.
- The lakes and scenery are beautiful
- The lakes, the quaintness, natural beauty
- The landscape
- The landscape, the connection between rural land
- small town, the slow pace
- the people
- The physical beauty of the area
- the range of activities - wineries, nature, shopping
- The scenery and ease of travel within the finger lakes
- The scenery is breathtaking while driving along finger
- lakes with hills and valleys and water
- the view of the lakes
- The whole package - scenery, food and wine,
- great people, home-town feel
- unique events available
- unique travel experience in a beautiful setting
- Used to have a cottage in Skeanatalus. Love the water
- and the beautiful scenery. Miss it! Went there every
- Summer and spent a lot of time there.
- A lot of childhood memories there.
- variety of different activities offered
- Variety of things to do & see
- very attractive area
- very historical
- Very unspoilt and it really is quite beautiful.
- wine
- wine trails
- Wineries (2)
- wonderful food (Johns Steakhouse and Ithaca Bakery)
- YEA ABSOULUTELY

## EVIDENCE OF QUALIFICATIONS, FIRM READINESS, BACKGROUND AND EXPERIENCE

Young Strategies, Inc. is a research and planning firm focusing on destination marketing organizations and travel destinations. The three principal members of this project team have conducted research and strategic planning with over 100 DMOs in twenty-six states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management. The project team is available to begin work on this project immediately and a proposed project schedule has been included on page 6 of this proposal. Individual profiles of the project team members are provided on page 7 of this proposal.

## RELATED PROJECT EXPERIENCE

Young Strategies and the members of the consulting team for this project have worked with over 100 destination marketing organizations in twenty-six states. In the past year the methodology proposed in this study has been utilized in the following destinations with great success: The project team, both individually and collectively have conducted destination research in the following states:

- Alabama
- California
- Florida
- Georgia
- Illinois
- Iowa
- Kansas
- Kentucky
- Louisiana
- Massachusetts
- Mississippi
- Missouri
- Montana
- Nebraska
- New York
- North Carolina
- North Dakota
- Oklahoma
- Pennsylvania
- South Carolina
- South Dakota
- Tennessee
- Texas
- Virginia
- West Virginia
- Wyoming

You can learn more about Young Strategies at: [www.youngstrategies.com](http://www.youngstrategies.com)

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## **PROJECT TEAM LEADERS**

### **BERKELEY W. YOUNG, PRESIDENT, YOUNG STRATEGIES – PROJECT TEAM LEADER**

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

### **AMY STEVENS, VICE PRESIDENT, YOUNG STRATEGIES**

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

### **LARRY GUSTKE, PHD, PROFESSOR EMERITUS NC STATE UNIVERSITY**

Over 30 years experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in many academic and professional networks related to tourism research.