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Erie Canalway National Heritage Corridor

**ECONOMIC IMPACT REPORT– EAST REGION CASE STUDY**

July 2010

**Prepared by:**



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ECONOMIC DEVELOPMENT

**In partnership with:**



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## EXECUTIVE SUMMARY

The Erie Canalway region possesses a unique cultural and historical asset that can be leveraged for economic development. The US Congress recognized this asset in 2000 by creating the Erie Canalway National Heritage Corridor along with now 49 other national heritage areas. The Corridor encompasses the 524 miles of the navigable New York State Canal System, including the Erie, Cayuga-Seneca, Oswego, and Champlain Canals and includes 234 communities in 23 different New York counties with nearly 2.7 million residents.

In 2008, the Corridor undertook a major surveying effort to build community partnerships through public participation in the process, from survey development through employment and analysis, to provide critical knowledge regarding the economic impacts of heritage tourism. The survey effort generated 800 responses at 22 participating heritage sites within the Corridor. A total of 138 survey respondents completed a detailed follow-up survey by mail. It was determined that 65% of the on-site survey respondents and 60% of the mail-back survey respondents were visitors to Corridor sites in the East Region, shown in Map 1 and Table 1 on page 7. This concentration of responses led to a decision to focus initial analysis on the East Region. Highlights from the study include:

- 70% of visitors to East Region are day trippers and 80% are from New York State.
- More than half of visitors to East Region sites come for a specific cultural and heritage tourism site or special event, rather than to visit the region in general. Historic sites and festivals are top attractions, followed by museums. This is in contrast to visitors to the West Region of the Corridor, where visiting family and friends is a more typical draw.
- The typical profile of a Corridor visitor is an adult between ages of 46 and 75, with income of \$75,000 or more per year and travelling with immediate family members.
- These visitors patronize local businesses: of those that shop, 57% visit historic downtowns, 43% shop in locally owned stores, 50% of meals eaten are in locally owned restaurants, and 21% of overnight visitors stay in locally owned lodging facilities (vs 29% who stay in chain hotels/motels).
- Most survey respondents reported learning about Corridor sites and activities from a previous visit and from the Internet. Family and friends was the next most common method for visitors to get their travel information. Repeat visitation to the Corridor is high – 54% reported being a repeat visitor.



- Total visitors to heritage sites in the East Region is estimated at 998,000 per year. Most of these visitors are day trippers who live in or near the Corridor. See Maps 2 and 3 on pages 9 and 10 for visitor origins.
- Day trip visitors spend approximately \$33 per trip and overnight visitors spend approximately \$360 per trip, shown in the table below.

Total Dollar Amount Spent on Various Categories Directly Related to Visiting the Corridor (by travel party)				
	Day Trip		Overnight Visitors	
	Total	Percent	Total	Percent
Lodging	\$605	12%	\$9,113	44%
Restaurants and Bars	\$1,547	31%	\$3,079	15%
Other Transportation Expenses (tolls, repairs)	\$80	2%	\$3,846	18%
Gas and Oil (auto, RV, boat)	\$920	19%	\$2,354	11%
Shopping (clothes, souvenirs, books)	\$888	18%	\$690	3%
Groceries and Take-Out Food	\$473	10%	\$1,282	6%
Admissions (entertainment, museums)	\$438	9%	\$582	3%
<b>Total Spending</b>	<b>\$4,951</b>	100%	<b>\$20,946</b>	100%
<b>Average Spent Per Person</b>	<b>\$33.46</b>		<b>\$361.14</b>	

- Heritage tourism in the East Region of the Corridor generates \$38 million dollars in sales at local businesses, which supports 507 local jobs paying \$14 million in wages.

## INTRODUCTION

When built, the Erie Canal was a major catalyst of America's economic development, providing opportunities for countless businesses, entrepreneurs and families from New York City to the western shores of Lake Huron. Even while transportation technology reduced the commercial use of the canal, the initial advantage created by the canal helped communities like Schenectady, Utica, Syracuse, and Buffalo sustain growth as they added railroad terminals and highway interchanges. Regrettably, industrial restructuring beginning in the 1950s has reshaped the geography of production, challenging economic futures of the once prosperous Canalway communities. The experiences of former Appalachian coalfield communities and other smaller one-mill towns has revealed that the economic shock of the loss of the base economic sector takes a generation or two before the affected communities adjust their economic development strategies.

The fortunes of many Erie Canalway communities resemble that of other deindustrialized regions. However, the Erie Canalway region possesses a unique cultural and historical asset that can once again catalyze a brighter future. Congress recognized this asset in 2000 by creating the Erie Canalway National Heritage Corridor along with now 49 other national heritage areas. The corridor encompasses the 524 miles of the navigable New York State Canal System, including the Erie, Cayuga-Seneca, Oswego, and Champlain Canals. There are 234 communities in 23 different New York counties with nearly 2.7 million residents within the 4,834 square mile Heritage Corridor. These communities share a unique natural, cultural, historical and scenic cohesive landscape. Through collaborative planning and action with the local communities and the State of New York, the Erie Canalway National Heritage Corridor has begun the process of leveraging its unique asset to revitalize the region. Opportunities for preservation and interpretation of the cultural history, educational programs for area schools and visitors, and fostering improvements of this World Class recreational resource abound. Together, the partners can build a brighter, environmentally sustainable, economic future with a high quality of life for the Canalway residents.

To optimize the investments in the Erie Canalway, the Heritage Corridor leadership team completed the Erie Canalway National Heritage Corridor Preservation and Management Plan, winner of the 2008 American Planning Association, Daniel Burnham Award for a Comprehensive Plan. The plan articulates the desire to "formulate policies and take action to achieve the National Heritage Corridor's full potential." Among the actions specified in the plan that directly bear on this project are: 1) to protect and preserve its historic, natural, cultural and recreational resources; 2) to foster and promote recreational opportunities; 3) to help market the Corridor for tourism; 4) to stimulate economic development and community revitalization, and; 5) to foster cooperative partnerships. With an award winning plan in place, the next step is to establish a baseline understanding of the economic impacts of the Canalway and develop other metrics to monitor and improve the ongoing efforts to simultaneously preserve the past and build a more economically and environmentally sustainable future for the Heritage Corridor.

Implementation began in earnest almost immediately. In 2008, the ECNHC participated in a national effort of the Alliance of National Heritage Areas (ANHA), to measure the economic impacts of heritage tourism. Though the data collection process was completed for this study, changes in staff at the ANHA delayed the data analysis and overall production of the study. ECNHC's initial vision for the project, however, was broad, and the decision was made to move to phase two of the survey project. Phase two was to use the data collected for a more fine grained analysis of the Erie Canalway region including a more detailed understanding of the inter-industry interactions and the potential for key marketing information to emerge from the data analysis.

Like their Preservation and Management plan, the ECNHC saw beyond the obvious benefits of documenting the economic baseline of its large service area and the potential to demonstrate a significant economic benefit to its stakeholders. The ECNHC envisioned the project as an opportunity to build its regional partnerships with local communities, non-governmental organizations, and all levels of government as it leveraged the expertise of the Corridor's academic institutions.

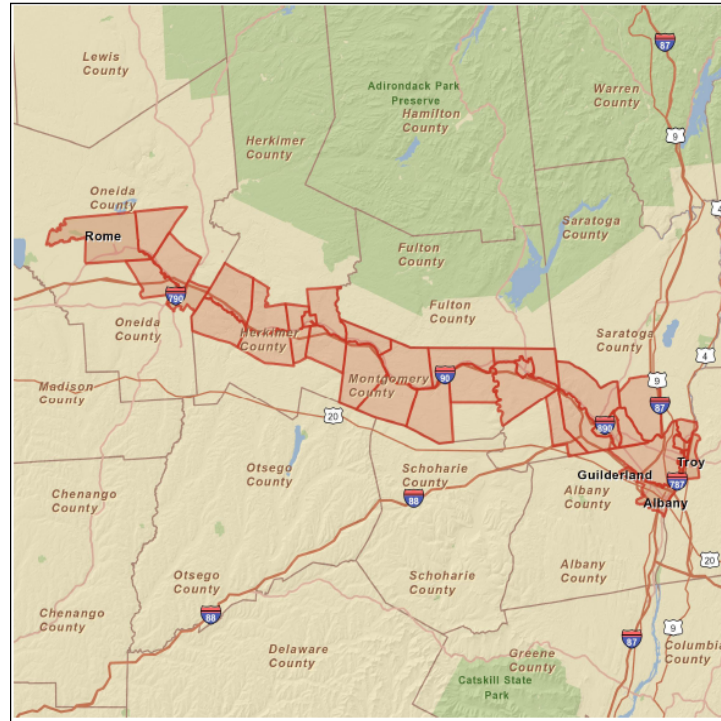
The strength of the Erie Canalway National Heritage Corridor Preservation and Management Plan is a reflection of the strong partnerships forged between the Erie Canalway leadership and the 234 diverse communities which lie along the Erie Canalway. Maintaining this collaboration is a critical challenge for measuring the economic impacts of the Erie Canalway and developing relevant metrics to monitoring ongoing efforts to achieve the goals of the Plan.

The importance of collaborating with the Corridor communities to the success of this project and the goals of the Heritage Corridor Commission cannot be understated. It was their participation that enabled the data collection. The volunteers came from all backgrounds, received a full day of training and donated countless hours to the onsite survey process. Through the research process partnerships were strengthened and expanded as the ECNHC demonstrated its commitment to local communities through their transparent collaborative process.

ECNHC volunteers gathered responses from 800 individuals at 22 participating ECNHC sites. A total of 138 of these on-site survey respondents participated in an extensive follow-up survey by mail. Both survey instruments are included in Appendix A. During the initial analysis of survey results, it was observed that 65% of the responses to the on-site survey were gathered at sites in the eastern part of the ECNHC (the "East Region"). Not surprisingly, nearly 60% of the responses to the mail back survey came from visitors to the East Region as well.

The concentration of survey responses from visitors to the East Region, combined with the lack of information on total annual visitation to the entire ECNHC, led Camoin Associates to recommend that a case study of the East Region be prepared as the first step in utilizing the 2008 survey data. The map 1 and the accompanying table show the communities that comprise the East Region. This definition was developed by ECNHC staff.

**Map 1. East Region Communities**



East Region Communities by County						
Oneida	Herkimer	Montgomery	Schenectady	Albany	Rensselaer	Saratoga
T. Floyd	T. Danube	V. Ames	T. Glenville	City of Albany	City of Troy	T. Clifton Park
T. Marcy	V. Dolgeville	T. Amsterdam	T. Niskayuna	City of Cohoes		T. Waterford
V. New York Mills	T. Frankfort	City of Amsterdam	T. Princetown	T. Colonie		V. Waterford
V. Oriskany	V. Frankfort	T. Canajoharie	T. Rotterdam	V. Colonie		
City of Rome	T. German Flatts	V. Canajoharie	City of Schenectady	T. Green Island		
City of Utica	T. Herkimer	T. Florida	V. Scotia	V. Green Island		
V. Whitesboro	V. Herkimer	V. Fonda		V. Menands		
T. Whitestown	V. Ilion	V. Fort Johnson		City of Watervliet		
V. Yorkville	City of Little Falls	V. Fort Plain				
	T. Little Falls	V. Fultonville				
	T. Manheim	T. Glen				
	V. Mohawk	V. Hagaman				
	T. Schuyler	T. Minden				
		T. Mohawk				
		V. Nelliston				
		T. Palatine				
		V. Palatine Bridge				
		T. Root				
		T. St. Johnsville				
		V. St. Johnsville				

In order to determine the statistical significance of the survey responses and conduct an economic impact assessment, the most accurate estimate possible of annual visitation to the



ECNHC had to be developed. No one had ever gathered annual visitation data from all of the heritage sites within the ECNHC before and, due to the large number of sites, it was not feasible within the scope of this study to do so. Instead, all 41 heritage sites identified by ECNHC staff as being located within the East Region were contacted to ask for their annual visitor numbers—27 of them responded. Based on the information provided, it was estimated that 998,000 people visit heritage sites in the East Region each year.

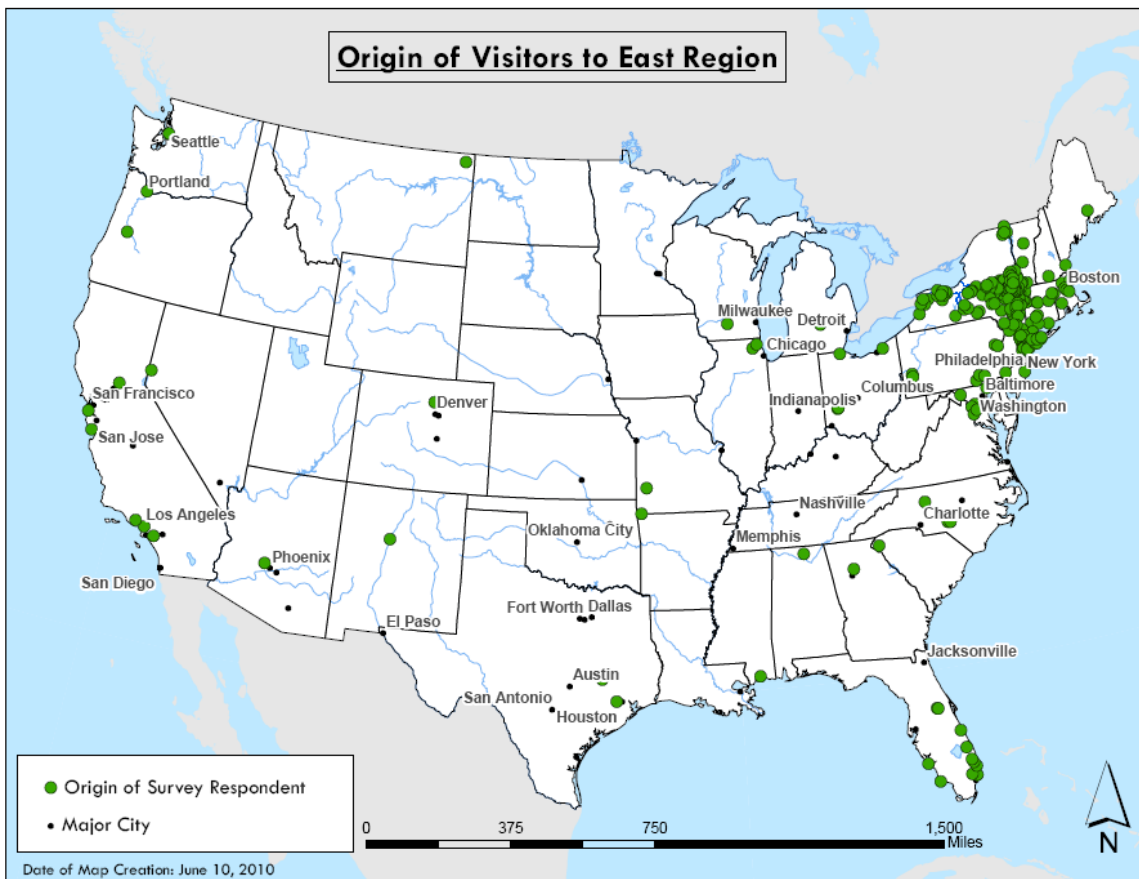
This report provides a profile of those 998,000 visitors and estimates the impact that their spending has on the local economy.

## PROFILE OF HERITAGE VISITORS

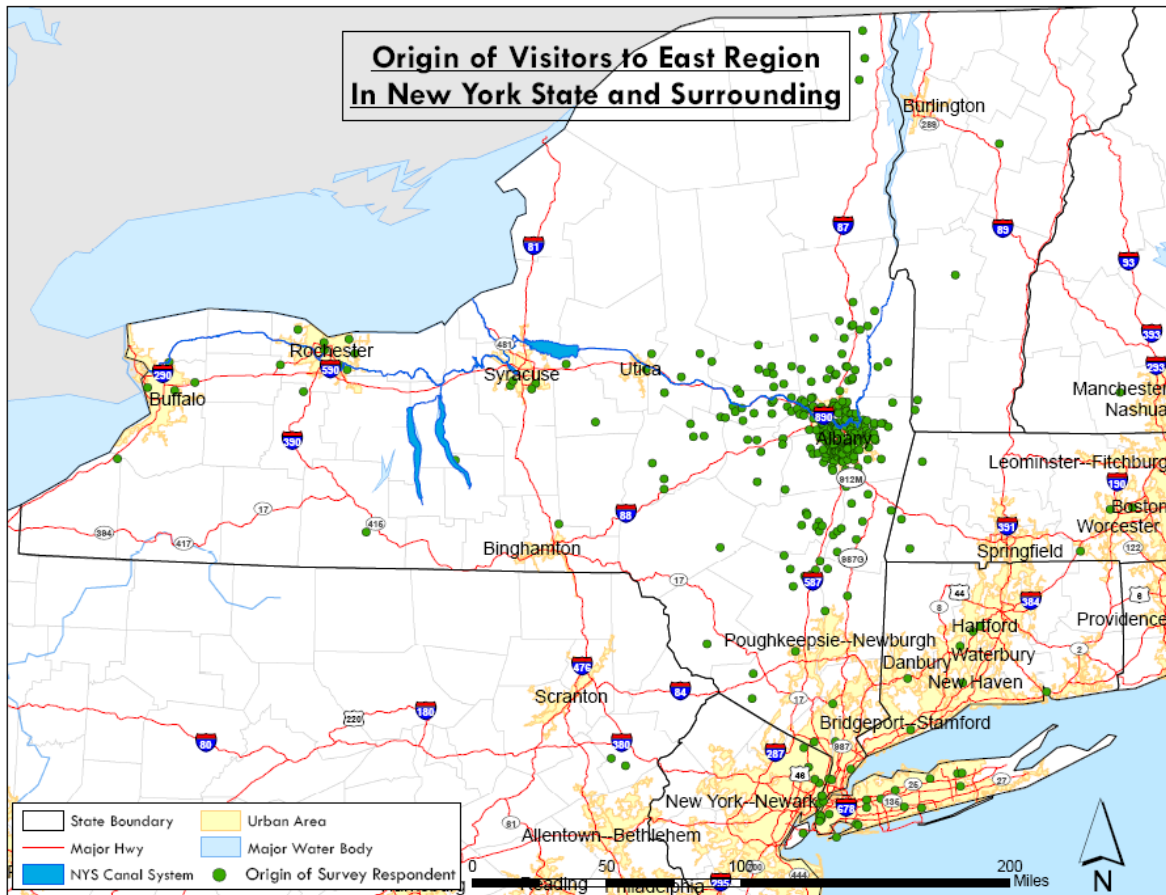
The survey data collected during the summer and fall of 2008 provide the ECNHC with a great deal of information about heritage visitors to the East Region, including why they came, how long they stayed, what they did, where they ate, how much they spent, etc. This information is useful to the ECNHC for purposes of determining the economic impact of these visitors, as well as for guiding future efforts to build partnerships that enhance and promote the Corridor.

The maps below show the origins of the 475 respondents to the on-site survey who reported a zip code. There were 517 total on-site survey responses from East Region sites, but 42 respondents did not provide any information on their origin. As shown in Map 2, most visitors are from New York State. Map 3 shows where in New York State visitors are from.

**Map 2. East Region Visitor Origins**



**Map 3. East Region Visitor Origins in New York State**

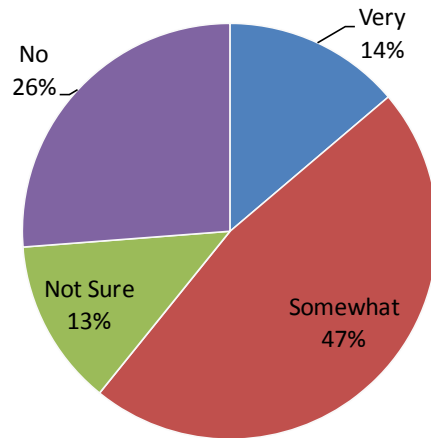


## On-site Survey Data Analysis

The following is a summary of the responses to each of the questions contained in the on-site survey. Based on the survey sample size of 800 and the estimated total population of visitors to East Region heritage sites (1 million), we can be 95% certain that the answers reported in the on-site survey have a five-point margin of error.

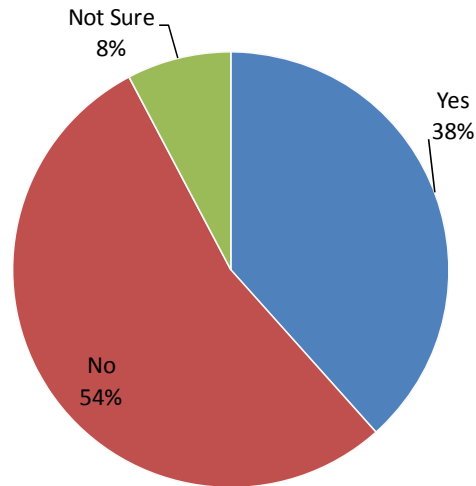
### OS-1) Are you familiar with the Erie Canalway National Heritage Corridor?

More than a third of visitors are not familiar with the ECNHC and only 14% were very familiar with the Corridor. This could indicate a need for increased marketing, awareness and education.



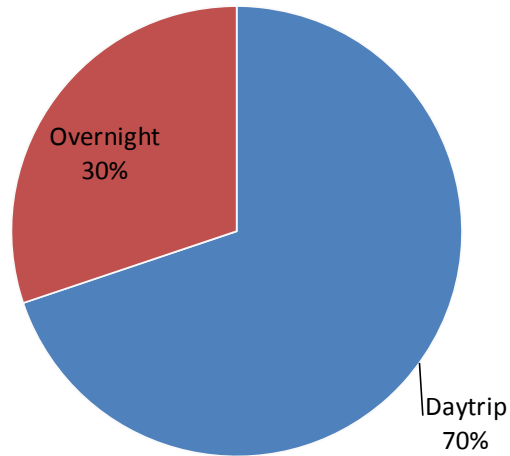
### OS-2) Is this your first trip to the Erie Canalway National Heritage Corridor?

More than 50% of the visitors are repeat visitors, which may indicate that it is just as important to market to those who have already visited as it is to try to get first time visitors.



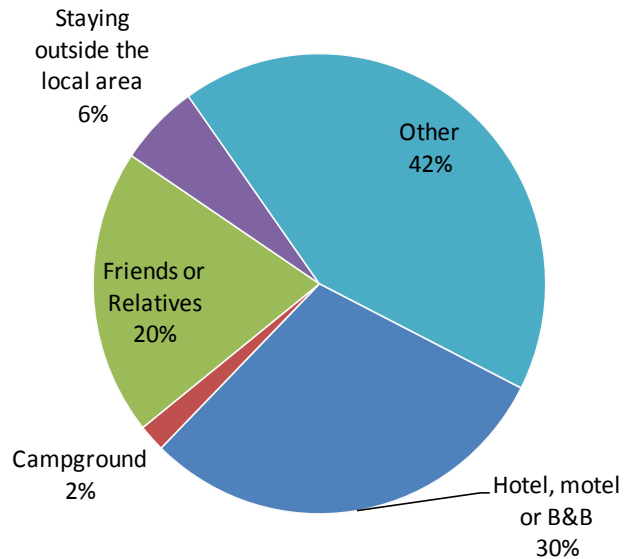


OS-3) *Is your trip to the ECNHC today part of a day trip or an overnight trip?*



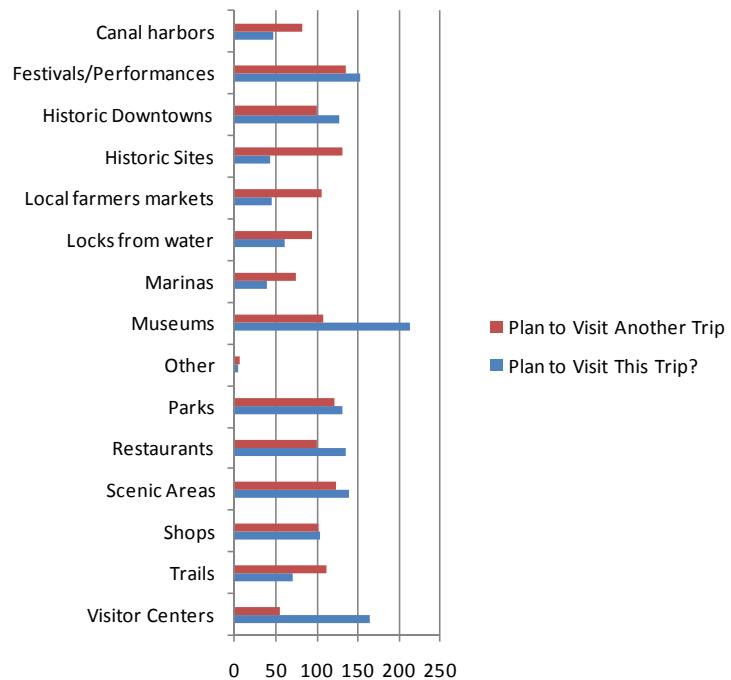
OS-4) *If an overnight trip, what type of lodging are you using?*

Of those visitors on an overnight trip, 20% are staying with friends or relatives. Note: "Other" category includes day trippers who answered the question, boaters who stayed on their boat and other forms of lodging not otherwise listed.



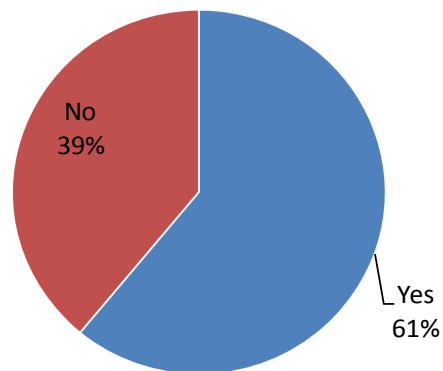
OS-5) Which of the following kinds of places do you plan to visit on this trip or another trip in the future?

A high number of respondents plan to visit museums and attend festivals or performances during their trip. Few people plan to visit visitor centers on following trips.



OS-6) Was one or more of these places (above) the primary reason for your trip to this area?

61% of the visitors came to the Corridor for a specific site or event.



People came to the corridor for a wide variety of reasons, but the most common response was for a "recreational activity". It is important to note that participants were able to check any that apply, and respondents could have considered any of the activities to be recreational.

Respondents could check all that apply, there were 669 responses out of 518 surveys.

What brought you to the site today? (check all that apply)	
	Number
Recreational activity	148
Historic/cultural resources	110
Special event	84
Educational activity	80
Enjoyment of scenic or natural setting	79
A family-friendly program	65
Guided tour or walk	42
Happened upon the site	31
Shopping in site gift shop	13
Picnicking	12
Camping	5

## Mail-Back Survey Data Analysis

The on-site survey respondents were asked about their willingness to provide more detailed information in a longer survey that they could take home with them and return by mail. This section summarizes the 83 responses to the mail-back survey. Due to the smaller sample size in this instance, the margin of error is higher than with the on-site survey. A smaller sample of the same total population creates a larger margin of error. We can be 95% certain that the answers below have an 11-point margin of error.

### MB-1) How often do you visit the ECNHC?

Note: There were some outliers in the data which may account for the high number of average trips.

Trips to the ECNHC		
	# of Trips in Lifetime	# of Trips in Past 12 Months
Median	3	1
Average	35	8

### MB-2) What are the ages of respondents?

Three quarters of the visitors to the East Region heritage sites were between the age of 46 and 75.

Age- All Respondents		
	Number	Percentage
18-25	0	0%
26-35	6	7%
36-45	10	12%
46-55	23	28%
56-65	21	25%
66-75	18	22%
76 and over	5	6%

### MB-3) What is the yearly income of respondents?

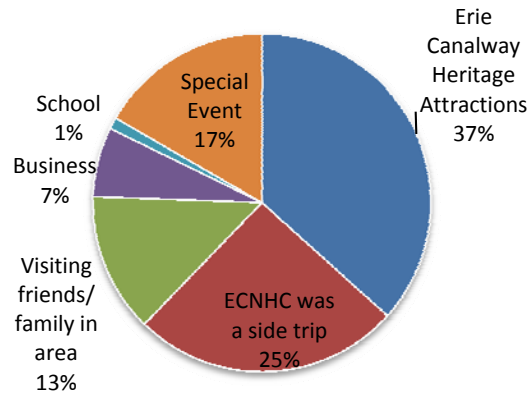
More than half of the respondents reported annual incomes of more than \$75,000.

Yearly Income - All Respondents		
	Number	Percentage
Under \$24,999	5	6%
\$25,000-\$34,999	5	6%
\$35,000 - \$49,999	11	14%
\$50,000-\$74,999	11	14%
\$75,000-\$99,999	24	31%
\$100,000 or more	21	27%

**MB-4) What was your primary reason for visiting the Corridor?**

More than one third of the visitors were coming specifically for a heritage attraction, and one quarter were visiting as a side-trip.

See CT-4 for information regarding the difference of primary reason for visiting between day and overnight visitors.



**MB-5) How did you travel to and within the corridor (check all that apply)?**

Most people traveled to and within the Corridor by personal vehicle.

How did you travel?		
	TO the ECNHC	WITHIN the ECNHC
	Responses	Responses
Personal Vehicle	67	45
Foot	8	19
Bike	3	7
Bus	2	1
Plane	1	0
Boat (motorized, owned)	3	5
Rental Vehicle	3	4
Train	2	0
Tour Boat	2	6
Tour Bus	0	4
Boat (motorized, rented)	0	1
Boat (non-motorized, owned)	0	0
Boat (non-motorized, rented)	0	0
Other	0	1



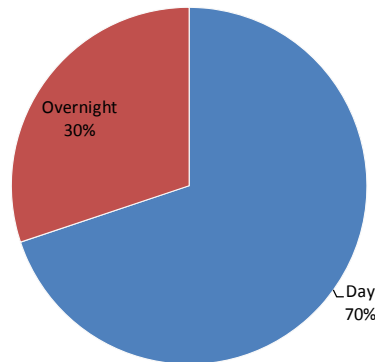
**MB-6) Who were you traveling with (check all that apply)?**

Immediate family members were the most likely travel companions for East Region survey respondents.

Who were you traveling with?	
	Number
Family (immediate)	68
Friends	9
I was alone	7
Relatives (from ECNHC)	7
Relatives (from outside ECNHC)	6
Retirees	4
Someone with a physical disability	1
Other	0
Professional Colleagues	0
Pets	0

**MB-7) Was your trip a day trip or an overnight trip?**

Note that the percentages for the mail-back survey respondents are identical to the surveys received onsite (30% and 70%).



On average, respondents who spend the day spent about 3.8 hours within the Corridor and those spending the night stay just over 4 nights.

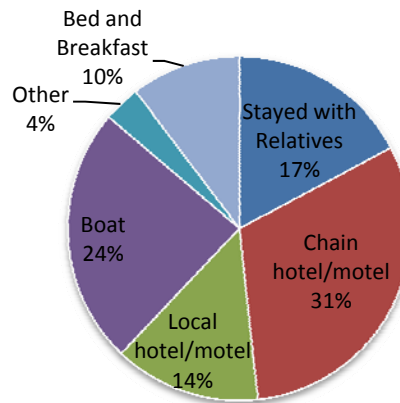
If it was a daytrip, how many hours did you spend?	
Median	4
Average	3.8

If it was an overnight, how many nights did you spend?	
Median	3
Average	4.4

**MB-8) If it was an overnight trip, what type of lodging did you use?**

Most respondents report staying in chain hotels/motels or with relatives. Boats are also one of the main types of lodging for those visiting the East Region.

Note: total mail back responses from overnight visitors was 25. One reported “other” and seven reported staying on a “boat”.



**MB-9) How did you get information about the area?**

The two most common sources of information that respondents use when planning their trip are previous visits and the Internet.

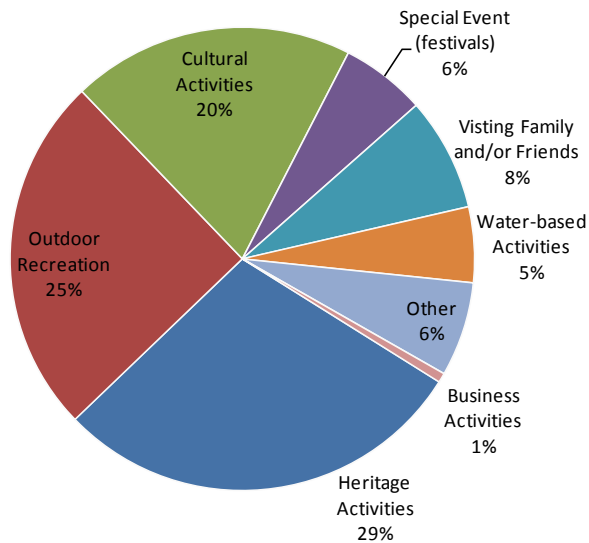
Another important source of information is family /friends / word of mouth. This may indicate an opportunity to draw more visitors to heritage sites by marketing sites to local residents more intensely.

Note: respondents could check all that apply and there were 184 selections from 83 surveys.

Prior to this trip, how did you obtain information about the area? (check all that apply)	
	Number
Previous visit	36
Family/Friends/Word of mouth	30
Web/Internet site	36
Travel guide/map	19
Newspaper/Magazine	16
Visitor center	13
Highway/Road Sign	5
Erie Canalway NHC brochure	9
TV/Radio	7
Newsletter	4
Program flyer/poster	6
Travel agent/Tour operator	2
Conference Planner	1
NYS Tourism Office, website	0
NYS Tourism Office, 1-800	0

**MB-10) What activities did you participate in?**

Most respondents visiting the East Region are participating in heritage activities and outdoor recreation.



**MB-11) Did you shop during your visit?**

Fewer than half of the respondents go shopping during their visit, and those that do shop spend “very little” time shopping. More information is needed to determine if this reflects a preference among visitors or a lack of shopping options.

Did You Shop During Your Visit to the ECNHC?		
	Number	Percentage
Yes	36	46%
No	42	54%
If you shopped, how much time on your trip did you spend shopping?		
	Number	Percentage
Very Little	31	86%
About Half	5	14%
Most of the Visit	0	0%



*MB-12) How much did you spend while visiting the Corridor?*

Respondents are spending an average of \$126 per person on their trip.

The highest amount is spent on lodging followed by food and drink at restaurants and bars.

Total Dollar Amount Spent on Various Categories Directly Related to Visiting the Corridor (by travel party)		
	Total	Percent
Lodging	\$9,718	38%
Restaurants and Bars	\$4,626	18%
Other Transportation Expenses	\$3,926	15%
Gas and Oil (auto, RV, boat)	\$3,274	13%
Shopping (clothes, souvenirs, books)	\$1,578	6%
Groceries and Take-Out Food	\$1,755	7%
Admissions (entertainment, museums)	\$1,020	4%
<b>Total Spending</b>	<b>\$25,897</b>	<b>100%</b>
<b>Average Spent Per Person</b>	<b>\$126</b>	

*MB-13) What type of businesses did visitors frequent while visiting the ECNHC East Region?*

About half of the visitors went shopping during their visit.

Of the visitors who reported shopping, 57% of their shopping time was spent in a historic downtown.

Did You Shop During Your Visit to the ECNHC?		
	Number	Percentage
Yes	36	46%
No	42	54%

If you shopped, what percentage of your time was spent in the following areas? (average)	
Historic Downtowns	57%
Modern Malls	45%
Other	16%

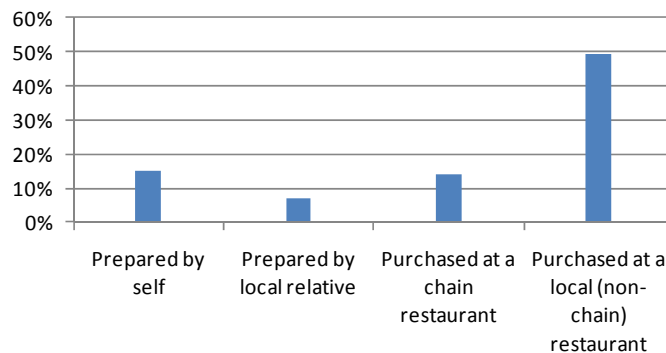
On average, 43% of the money spent while shopping was spent in locally-owned stores.

If you spent money while shopping, what percentage of the dollar amount was spent in the following outlets? (average)	
Locally Owned Stores	43%
Attraction Gift Shop	29%
Chain	16%

Over 75% of those visiting the ECNHC East Region ate at least one meal during their trip.

Did you dine in or eat out during your trip?		
	Number	Percent
Yes	27	77%
No	8	23%

It is important to note that over half of the meals eaten were done so in a local eatery versus and chain operation as this has significant implication regarding the local economy and marketing opportunities.



## Cross Tabulations

The following is a number of cross tabulations of the survey responses to gain further insights into East Region visitors.

### CT-1) How do day visitors differ from overnight visitors?

A significantly higher percentage of day visitors participate in cultural activities and they are also more likely to attend a special event. Overnight visitors are more likely to visit family and friends and participate in water-based activities.

What Activities Did You Participate in?				
	Day Visitors		Overnight Visitors	
	Number	Percentage	Number	Percentage
Heritage Activities	27	27%	17	32%
Outdoor Recreation	25	25%	13	25%
Cultural Activities	24	24%	6	11%
Special Event (festivals)	7	7%	2	4%
Visiting Family and/or Friends	6	6%	6	11%
Water-based Activities	1	1%	7	13%
Business Activities	1	1%	0	0%
Other	8	8%	2	4%
Total Responses	99	100%	53	100%

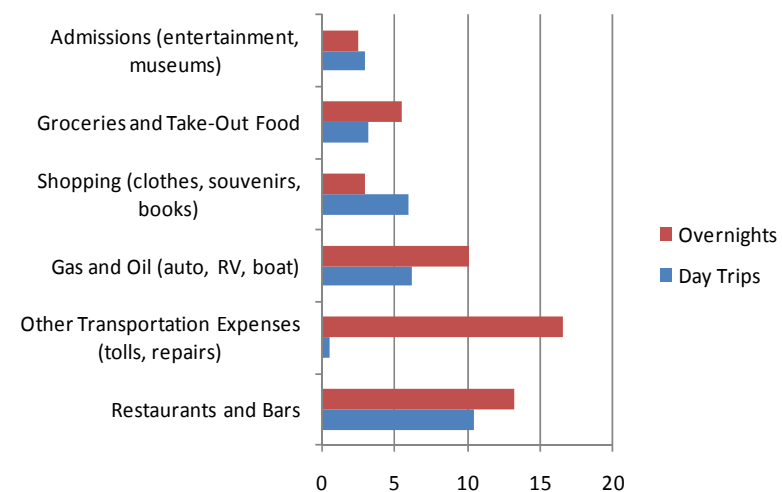
### CT-2) How does spending by day visitors differ from overnight visitors?

On average, day visitors spend a larger portion of their money on restaurants, whereas the highest expenditure category for overnight visitors is lodging.

Total Dollar Amount Spent on Various Categories Directly Related to Visiting the Corridor (by travel party)				
	Day Trip		Overnight Visitors	
	Total	Percent	Total	Percent
Lodging	\$605	12%	\$9,113	44%
Restaurants and Bars	\$1,547	31%	\$3,079	15%
Other Transportation Expenses (tolls, repairs)	\$80	2%	\$3,846	18%
Gas and Oil (auto, RV, boat)	\$920	19%	\$2,354	11%
Shopping (clothes, souvenirs, books)	\$888	18%	\$690	3%
Groceries and Take-Out Food	\$473	10%	\$1,282	6%
Admissions (entertainment, museums)	\$438	9%	\$582	3%
<b>Total Spending</b>	<b>\$4,951</b>	<b>100%</b>	<b>\$20,946</b>	<b>100%</b>
<b>Average Spent Per Person</b>	<b>\$33.46</b>		<b>\$361.14</b>	

### CT-3) Excluding lodging, how does spending by day visitors differ from overnight visitors?

Comparing the spending per person per day of day visitors and overnight visitors (excluding lodging), the overnight visitors spend more per category in every category except shopping.



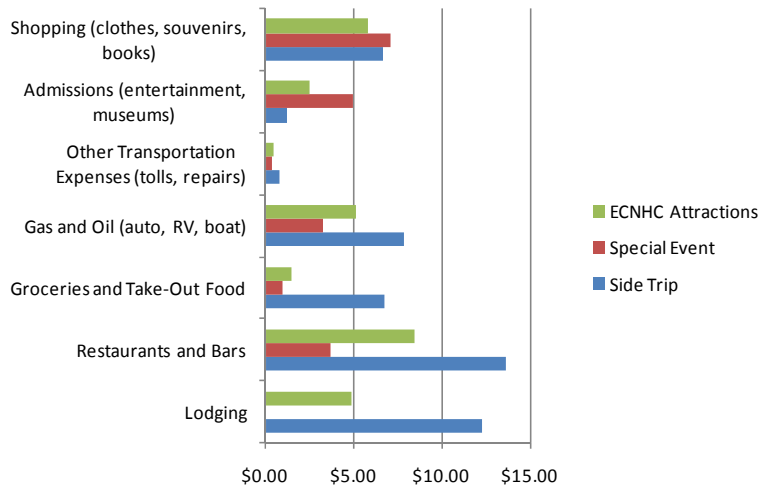
**CT-4) What was the primary reason for visiting the ECNHC East Region?**

Day visitors are most likely to be in the ECNHC to visit a heritage site. Overnight visitors are most likely to be there as a side trip or to visit a heritage site. Overnight visitors are more likely to be visiting friends than day visitors.

Primary Reason for Trip				
	Day Visitors		Overnight	
	Number	Percentage	Number	Percentage
Erie Canalway Heritage Attractions	24	39%	9	31%
ECNHC was a side trip	13	21%	10	34%
Visiting friends in area	7	11%	5	17%
Business	3	5%	3	10%
School	1	2%	0	0%
Special Event	13	21%	2	7%
<b>Total</b>	<b>61</b>	<b>100%</b>	<b>29</b>	<b>100%</b>

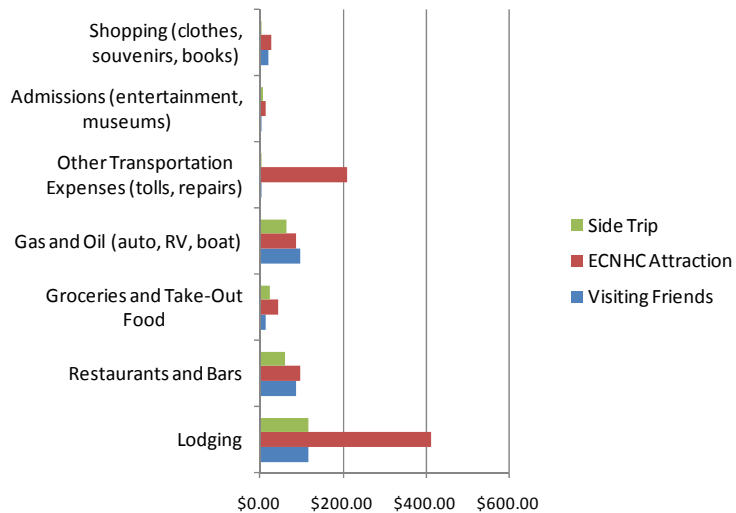
**CT-5) Expenditures by Day Visitors**

This graph breaks day visitors out into the top three primary reasons for visiting and shows the average amount spent on various categories of goods. Those who come to the East Region for a side trip are more likely to spend higher amounts of money.



### CT-6) Expenditures by Overnight Visitors

This graph breaks overnight visitors into the top three reasons for visiting and shows the average amount spent on various categories. Those who come to the East Region for a heritage attraction spend the most money.



### CT-7) How does age impact use of the ECNHC East Region?

As shown in a previous table, 75% of respondents are between the age of 46 and 75. The following tables break respondents into three age cohorts to see if there are any differences in behavior.

The most likely reason for visiting among all respondents over the age of 36 is heritage attractions. However, respondents over the age of 56 are more likely than those ages 36-55 to come to the Corridor for a special event. 18-35 year olds are the most likely to come to the Corridor for a special event.

What was your primary reason for visiting the ECNHC?						
	18-35 year olds		36-55 year olds		56 and above	
	Number	Percent	Number	Percent	Number	Percent
ECNHC Attractions	1	17%	13	38%	16	36%
ECNHC was a side trip	1	17%	8	24%	13	30%
Visiting friends in area	1	17%	6	18%	3	7%
Business	0	0%	4	12%	2	5%
School	1	17%	0	0%	0	0%
Special Event	2	33%	3	9%	10	23%
<b>Total</b>	<b>6</b>	<b>100%</b>	<b>34</b>	<b>100%</b>	<b>44</b>	<b>100%</b>



This table shows that the activities that visitors participate in are similar among the two older age cohorts. It should be noted that some of the information in this table contradicts conclusions drawn in the previous table: here very few respondents over the age of 56 actually reported participating in a special event. This may indicate some confusion among respondents when answering this question.

On this visit, what activities did you and your group participate in?						
	18-35 year olds		36-55 year olds		56 and above	
	Number	Percent	Number	Percent	Number	Percent
Heritage Activities	3	33%	21	31%	20	29%
Outdoor Recreation	3	33%	15	22%	18	26%
Cultural Activities	0	0%	13	19%	17	24%
Special Event (festivals)	2	22%	6	9%	1	1%
Visiting Family and/or Friends	0	0%	6	9%	4	6%
Water-based Activities	1	11%	1	1%	6	9%
Other	0	0%	4	6%	4	6%
Business Activities	0	0%	1	1%	0	0%
<b>Total Responses</b>	<b>9</b>	<b>100%</b>	<b>67</b>	<b>100%</b>	<b>70</b>	<b>100%</b>

#### CT-8) How does the source of information impact the use of the ECNHC East Region?

As shown earlier, the most common sources of information during trip planning include previous visits, word of mouth, and the Internet. This section analyzes respondents who report utilizing those three sources to see if there are any notable differences in their behavior.

The activities that respondents participate in do not change drastically based on the source of trip planning information.

What activities did you participate in? (by source of information)						
	Previous Visit		Web/Internet		Family/Friend	
	Number	Percent	Number	Percent	Number	Percent
Heritage Activities	21	28%	20	27%	15	29%
Cultural Activities	17	23%	18	24%	11	21%
Outdoor Recreation	20	27%	19	26%	9	17%
Water-based Activities	3	4%	4	5%	5	10%
Special Event (festivals)	3	4%	3	4%	1	2%
Visiting Family and/or Friends	7	9%	3	4%	8	15%
Business Activities	0	0%	1	1%	0	0%
Other	3	4%	6	8%	3	6%
<b>Total</b>	<b>74</b>	<b>100%</b>	<b>74</b>	<b>100%</b>	<b>52</b>	<b>100%</b>

While the primary reason for visiting is similar across the three groups, those respondents who come primarily for heritage attractions are somewhat more likely to get their information on-line. Not surprisingly, those who got information from family or friends were also more likely to be going on their trip primarily to visit family or friends.

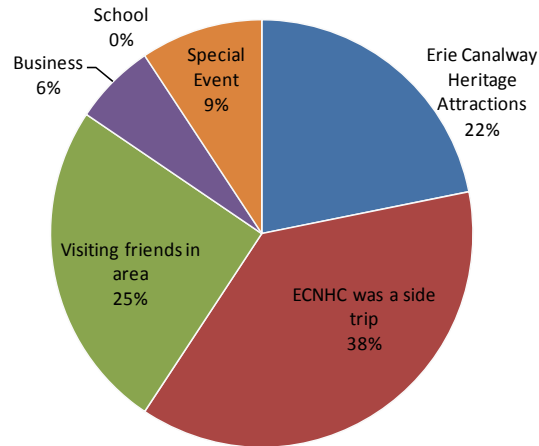
What was your primary reason for visiting? (by source of information)						
	Previous Visit		Web/Internet		Family/Friend	
	Number	Percent	Number	Percent	Number	Percent
ECNHC Attractions	20	47%	23	58%	10	32%
ECNHC was a side trip	7	16%	8	20%	6	19%
Visiting friends in area	7	16%	1	3%	7	23%
Business	3	7%	3	8%	2	6%
School	1	2%	0	0%	0	0%
Special Event	5	12%	5	13%	6	19%
<b>Total</b>	<b>43</b>	<b>100%</b>	<b>40</b>	<b>100%</b>	<b>31</b>	<b>100%</b>

## Out-of-state Visitors

About 10% of respondents to the on-site survey were from out-of-state. This section looks specifically at their responses to key survey questions.

**CT-9) What was the primary reason for out-of-state visitors to come?**

Most out-of-state visitors are not coming for heritage activities. The largest percentage report visiting the Corridor on a side trip, followed by those coming to visit family and friends.



**CT-10) What activities did out-of-state visitors participate in?**

The three most common activities out-of-state visitors participated in were heritage activities, outdoor recreation and visiting family or friends.

What activities did you participate in? (out of state visitors)		
	Number	Percent
Heritage Activities	17	33%
Outdoor Recreation	14	27%
Cultural Activities	4	8%
Special Event (festivals)	2	4%
Visiting Family and/or Friends	8	16%
Water-based Activities	4	8%
Other	2	4%
Business Activities	0	0%
<b>Total</b>	<b>51</b>	<b>100%</b>

**CT-11) Where did out-of-state overnight visitors stay?**

For overnight visitors from out-of-state, many stayed at chain hotels/motels or with relatives.

If you stayed overnight, where did you stay? (out of state visitors)		
	Number	Percent
Chain hotel/motel	8	36%
Stayed with Relatives	6	27%
Boat	3	14%
Local hotel/motel	1	5%
Other	1	5%
Bed and Breakfast	2	9%
Campground	1	5%
Stayed with Friends	0	0%
<b>Total</b>	<b>22</b>	<b>100%</b>

**CT-12) Where did out-of-state visitors obtain information about the area?**

Most visitors from out-of-state learned about the Corridor through family or friends, the Internet or a previous visit. This is very similar to the profile of all East Region visitors.

Prior to this trip, how did you obtain information about the area?		
	Number	Percentage
Family/Friends/Word of mouth	11	18%
Web/Internet site	10	16%
Previous visit	8	13%
Travel guide/map	8	13%
Newspaper/Magazine	5	8%
Visitor center	4	7%
Erie Canalway NHC brochure	4	7%
Newsletter	3	5%
Highway/Road Sign	2	3%
TV/Radio	2	3%
Program flyer/poster	2	3%
Travel agent/Tour operator	1	2%
Conference Planner	1	2%
NYS Tourism Office, website	0	0%
NYS Tourism Office, 1-800	0	0%
<b>Total</b>	<b>61</b>	<b>100%</b>

**CT-13) How much did out-of-state visitors spend?**

Visitors from out-of-state spend, on average, more than three times that of in-state visitors to the East Region.

Total Dollar Amount Spent on Various Categories Directly Related to Visiting the Corridor (by travel party)						
	Out of State Visitors			In State Visitors		
	Total	Percent	Per Person	Total	Percent	Per Person
Lodging	\$7,778	53%	\$ 134.10	\$1,940	17%	\$ 13.11
Restaurants and Bars	\$2,519	17%	\$ 43.43	\$2,107	19%	\$ 14.24
Other Transportation Expenses (tolls, repairs)	\$1,110	8%	\$ 19.14	\$645	6%	\$ 4.36
Gas and Oil (auto, RV, boat)	\$1,921	13%	\$ 33.12	\$1,353	12%	\$ 9.14
Shopping (clothes, souvenirs, books)	\$136	1%	\$ 2.34	\$3,790	33%	\$ 25.61
Groceries and Take-Out Food	\$569	4%	\$ 9.81	\$451	4%	\$ 3.05
Admissions (entertainment, museums)	\$526	4%	\$ 9.07	\$1,052	9%	\$ 7.11
<b>Total Spending</b>	<b>\$14,559</b>			<b>\$11,338</b>		
<b>Average Spent Per Person</b>	<b>\$251.02</b>			<b>\$76.61</b>		

## Comparing East Region and West Region Visitors

This section compares data collected from visitors to the East Region to data collected from West Region visitors to identify any similarities or differences. The West Region is comprised of communities along the canal in Wayne, Ontario, Monroe, Orleans, Niagara and Erie Counties. Without knowing the total population size of visitors to the West Region, it is not possible to determine the statistical significance of these responses, but nevertheless, they do generate some interesting questions for future research.

*WR-1) What was the primary purpose of the trip for visitors to West Region sites?*

A much higher percentage of West Region visitors were in the Corridor primarily to visit family or friends or attend a special event, whereas most East Region visitors were there for a heritage attraction or as a side trip.

What was your primary purpose of the trip?				
	West Region		East Region	
	Number	Percent	Number	Percent
ECNHC attractions	6	15%	33	37%
ECNHC was a side trip	2	5%	23	26%
Visiting friends or relatives	15	38%	12	13%
Business	3	8%	6	7%
School trip	0	0%	1	1%
Special event	13	33%	15	17%

*WR-2) What activities did visitors to the West Region sites participate in?*

Similar to the primary purpose for the trip, a higher number of the visitors to the West Region were participating in visiting family and friends and attending special events.

What Activities Did You Participate in?				
	West Region		East Region	
	Number	Percent	Number	Percent
Heritage Activities	17	19%	44	29%
Outdoor Recreation	19	22%	38	25%
Cultural Activities	9	10%	30	20%
Special Event (festivals)	20	23%	9	6%
Visiting Family and/or Friends	15	17%	12	8%
Water-based Activities	6	7%	8	5%
Business Activities	2	2%	1	1%
Other	0	0%	10	7%
Total Responses	88	100%	152	100%



WR-3) How did visitors to the West Region obtain information about the site?

The top three sources of information were the same between both groups.

Prior to this trip, how did you obtain information about the area?				
	West Region		East Region	
	Number	Percent	Number	Percent
Previous visit	18	22%	36	20%
Family/Friends/Word of mouth	23	28%	30	16%
Web/Internet site	13	16%	36	20%
Travel guide/map	6	7%	19	10%
Newspaper/Magazine	7	8%	16	9%
Visitor center	2	2%	13	7%
Highway/Road Sign	3	4%	5	3%
Erie Canalway NHC brochure	3	4%	9	5%
TV/Radio	3	4%	7	4%
Newsletter	3	4%	4	2%
Program flyer/poster	1	1%	6	3%
Travel agent/Tour operator	0	0%	2	1%
Conference Planner	0	0%	1	1%
NYS Tourism Office, website	1	1%	0	0%
NYS Tourism Office, 1-800	0	0%	0	0%

WR-4) Where did overnight visitors to the West Region stay?

West Region visitors are much more likely to stay with relatives or friends. East Region visitors are much more likely to stay in a hotel/motel.

If it was an overnight trip, what type of lodging did you use in the ECNHC?				
	West Region		East Region	
	Number	Percent	Number	Percent
Chain hotel/motel	1	5%	11	29%
Stayed with Relatives	9	43%	8	21%
Boat	0	0%	7	18%
Local hotel/motel	2	10%	5	13%
Bed and Breakfast	0	0%	3	8%
Campground	1	5%	1	3%
Stayed with Friends	5	24%	0	0%
Other	3	14%	3	8%
Total	18	86%	38	100%



*WR-5) How much did visitors to the West Region spend when visiting the Corridor?*

Those visiting the West Region spent much less on the various line items than those visiting the East Region. This probably has to do with many of them staying with relatives and friends rather than in a hotel.

Total Dollar Amount Spent on Various Categories Directly Related to Visiting the Corridor (by travel party)				
	West Region		East Region	
	Total	Percent	Total	Percent
Lodging	\$900	10%	\$9,718	38%
Restaurants and Bars	\$3,450	39%	\$4,626	18%
Other Transportation Expenses (tolls, repairs)	\$778	9%	\$3,926	15%
Gas and Oil (auto, RV, boat)	\$1,060	12%	\$3,274	13%
Shopping (clothes, souvenirs, books)	\$1,267	14%	\$1,578	6%
Groceries and Take-Out Food	\$758	8%	\$1,755	7%
Admissions (entertainment, museums)	\$723	8%	\$1,020	4%
Total Spending	\$8,936	100%	\$25,897	100%
Average Spent Per Person	\$64.75		\$126	

## ECONOMIC IMPACT OF EAST REGION VISITORS

To determine the economic impact of visitors to ECNHC East Region heritage sites, there were two key pieces of information:

- The average spending of heritage visitors.
- The number of people visiting the ECNHC East Region heritage sites annually.

### Average Spending by Heritage Visitors

Using the information gathered through the data analysis, the average spending per day for overnight and day visitors was determined. Table 1 shows the average spending per person on seven expenditure groups. This information is used to determine the amount spent annually by visitors to the region.

**Table 1: Total amount spent per person**

Total Dollar Amount Spent Per Day on Various Categories Directly Related to Visiting the Corridor East Region		
	Day Trip	Overnight
	Average Per Person	Average Per Person *
Lodging	\$4.09	\$30.36
Restaurants and Bars	\$10.45	\$18.51
Other Transportation Expenses (tolls, repairs)	\$0.54	\$8.61
Gas and Oil (auto, RV, boat)	\$6.22	\$14.51
Shopping (clothes, souvenirs, books)	\$6.00	\$3.17
Groceries and Take-Out Food	\$3.20	\$4.87
Admissions (entertainment, museums)	\$2.96	\$4.53

\* - Camoin Associates removed one outlier which listed lodging expenses at \$4,400 for two nights

### Total Visitation to Heritage Sites

To estimate total annual visitation, 41 heritage sites within the East Region were contacted—27 of them responded. The total number of visits counted by these heritage sites is 1,174,029. As shown on page six of this report, 70% of survey respondents reported they were a day visitor, and 30% reported staying overnight. Assuming that visitors who are spending the night would visit two heritage sites during their trip, the overnight visits were discounted by one half to determine the total number of unique visitors to the heritage sites, to reduce double counting and over estimating the total economic impact. Using this methodology, it is estimated that there are 998,000 unique visits to the ECNHC East Region each year. Table 2, below, shows this calculation.

**Table 2: Total Visitation to the East Region Heritage Sites**

Total Visitation to the ECNHC East Region Heritage Sites	
Total Visitation*	1,174,029
Percent Day Visitors	70%
Total Day Trips	821,820
Percent Overnight Visitors	30%
Total Unique Overnight Visitors**	176,104
<b>Total Unique Visitors to East Region</b>	<b>997,925</b>

\* Based on annual visitation reported by ECNHC East Region Heritage Sites

\*\* Assuming overnight visitors go to two sites during trip

Source: Camoin Associates, phone interviews with heritage sites

In order to determine the economic impact of the heritage sites on the region, it is necessary that only those visitors who were coming specifically for an ECNHC attraction are counted as having an impact. It is assumed that those who are not coming primarily for the Corridor attractions would come whether the heritage site was there or not, and therefore their spending should not be counted. The survey data show that 31% of day visitors and 39% of overnight visitors come primarily for an ECNHC attraction. Using these percentages, it is estimated that 323,445 visitors come to the East Region specifically for an ECNHC attraction (referred to as “direct visitors” below).

**Table 3: Visitors to the East Region Primarily for Heritage Sites**

Visitors Coming to the East Region Corridor Primarily for the Heritage Sites	
Total Day Trips	821,820
Day Visitors Coming Primarily for the ECNHC (31%)	254,764
Total Overnight Trips	176,104
Overnight Visitors Coming Primarily for the ECNHC (39%)	68,681
<b>Total Visitors Coming for ECNHC</b>	<b>323,445</b>

Of these heritage-driven direct visitors, some are coming from within the East Region and some are coming from outside (for purposes of the economic impact analysis, the East Region study area is defined as Albany, Herkimer, Montgomery, Oneida, Rensselaer, Saratoga, and Schenectady Counties). By analyzing the location-of-origin of respondents to the surveys conducted at the East Region sites, it was determined that 27% of visitors to the East Region are from within the seven-county area and 73% are from outside. The 73% of visitors from outside the region are considered “net new” and therefore their spending will generate an economic impact on the region. Table 4 shows the calculation for determining that there are 236,115 “net new” direct visitors to the East Region.



**Table 4: Net New Direct Visitors to the East Region**

Total Net New Direct Visitors to the ECNHC East Region	
Total Direct Day Visitors to the Area	254,764
Total Net New Direct Day Visitors (73%)	185,978
Total Direct Overnight Visitors to the Area	68,681
Total Net New Direct Overnight Visitors (73%)	50,137
<b>Total Net New Direct Visitors to the East Region</b>	<b>236,115</b>

#### Net New Spending Related to ECNHC East Region Heritage Sites

In order to determine the amount being spent by the net new direct visitors, the average amount spent per person per trip was used and multiplied it by the estimated number of net new direct day and overnight visitors. Table 5 shows the total net new direct spending generated by East Region visitors.

**Table 5: Direct Net New Spending**

Direct Net New Spending by Visitors to the ECNHC East Region Per Trip					
	Day Trip		Overnight		
	Ave. Spending Per Person	Total Spending*	Ave. Spending Per Person ***	Total Spending **	Total Net New Spending
Lodging	\$4.09	\$760,248	\$121.45	\$6,089,019	<b>\$6,849,267</b>
Restaurants and Bars	\$10.45	\$1,943,973	\$74.05	\$3,712,659	<b>\$5,656,632</b>
Other Trans. Expenses (tolls, repairs)	\$0.54	\$100,654	\$34.46	\$1,727,578	<b>\$1,828,232</b>
Gas and Oil (auto, RV, boat)	\$6.22	\$1,156,079	\$58.03	\$2,909,226	<b>\$4,065,305</b>
Shopping (clothes, souvenirs, books)	\$6.00	\$1,115,868	\$12.70	\$636,692	<b>\$1,752,560</b>
Groceries and Take-Out Food	\$3.20	\$594,376	\$19.49	\$977,051	<b>\$1,571,426</b>
Admissions (entertainment, museums)	\$2.96	\$550,709	\$18.14	\$909,266	<b>\$1,459,974</b>
<b>Total</b>		<b>\$6,221,907</b>		<b>\$16,961,490</b>	<b>\$23,183,397</b>

\* Assuming 185,978 direct net new day visitors to the ECNHC East Region

\*\* Assuming 50,137 direct net new overnight visitors to the ECNHC East Region

\*\*\* Assuming average trip is 4 days as reported in the survey

#### Economic Impact Analysis

The economic impact of a particular project is the sum of the direct and indirect impacts. The direct impacts are those directly related to the project or site in question, in this case the actual spending by net new direct visitors. The indirect impacts are those which occur as the dollars from direct impacts cycle through the economy. For example, the direct spending by visitors at local businesses generates new sales and the need for employees. The new employees receive wages and in turn spend a portion of those dollars in the local economy

for daily needs, housing and other expenses. As those dollars continue to circulate, additional jobs and business activity are created. This effect is captured in the indirect impacts and is commonly referred to as the “multiplier effect.”

Different types of spending have different multiplier effects on the community and are typically based on the type of industry in which spending occurs, the average wages associated with that industry and the current concentration of the industry in the community. For the analysis of the heritage sites, Camoin Associates used the input-output model created by Economic Modeling Specialists to identify the unique multiplier associated with the seven spending categories used in the survey to determine the impact of the visitor spending on the economy of the seven-county study area in terms of sales, jobs and wages. Tables 6, 7 and 8 below show the direct spending, the indirect impact, the multiplier used and the indirect impact of the ECNHC East Region heritage sites on the East Region counties.

**Table 6: Sales Impact of Visitors to the ECNHC East Region**

<b>Economic Impact of Visitors to the Erie Canal National Heritage Corridor East Region - Sales</b>			
Category	Direct	Indirect	Total
Lodging	\$ 6,849,267	\$ 4,520,516	\$ 11,369,784
Restaurants and Bars	\$ 5,656,632	\$ 3,620,244	\$ 9,276,876
Other Transportation Expenses (tolls, repairs)	\$ 1,828,232	\$ 1,206,633	\$ 3,034,865
Gas and Oil (auto, RV, boat)	\$ 4,065,305	\$ 2,642,448	\$ 6,707,753
Groceries and Take-Out Food	\$ 1,752,560	\$ 1,051,536	\$ 2,804,096
Shopping (clothes, souvenirs, books)	\$ 1,571,426	\$ 1,037,141	\$ 2,608,568
Admissions (entertainment, museums)	\$ 1,459,974	\$ 1,036,582	\$ 2,496,556
<b>Total Spending</b>	<b>\$ 23,183,397</b>	<b>\$ 15,115,101</b>	<b>\$ 38,298,498</b>

Source: EMSI, Camoin Associates

**Table 7: Jobs Impact of Visitors to the ECNHC East Region**

<b>Economic Impact of Visitors to the Erie Canal National Heritage Corridor East Region - Jobs</b>			
Category	Direct	Indirect	Total
Lodging	82	45	127
Restaurants and Bars	108	34	142
Other Transportation Expenses (tolls, repairs)	22	12	34
Gas and Oil (auto, RV, boat)	52	26	78
Groceries and Take-Out Food	30	10	40
Shopping (clothes, souvenirs, books)	29	10	39
Admissions (entertainment, museums)	37	10	47
<b>Total Jobs</b>	<b>360</b>	<b>147</b>	<b>507</b>

Source: EMSI, Camoin Associates

**Table 8: Wages Impact of Visitors to the ECNHC East Region**

<b>Economic Impact of Visitors to the Erie Canal National Heritage Corridor East Region - Wages</b>			
Category	Direct	Indirect	Total
Lodging	\$2,241,667	\$1,793,333	\$4,035,000
Restaurants and Bars	\$1,924,260	\$1,327,740	\$3,252,000
Other Transportation Expenses (tolls, repairs)	\$729,341	\$488,659	\$1,218,000
Gas and Oil (auto, RV, boat)	\$1,624,096	\$1,071,904	\$2,696,000
Groceries and Take-Out Food	\$701,875	\$421,125	\$1,123,000
Shopping (clothes, souvenirs, books)	\$629,518	\$415,482	\$1,045,000
Admissions (entertainment, museums)	\$502,762	\$407,238	\$910,000
<b>Total Wages</b>	<b>\$8,353,520</b>	<b>\$5,925,480</b>	<b>\$14,279,000</b>

Source: EMSI, Camoin Associates

Table 9 is a summary of the economic impact of visitors to East Region heritage sites. As shown in the table, these visitors generate \$38 million in sales at local businesses. This spending supports over 500 local jobs paying \$14 million in wages to local workers.

**Table 9: Summary of the Economic Impacts of the ECNHC East Region**

<b>Summary of the Economic Impact of the ECNHC East Region</b>			
	Direct	Indirect	Total
Sales	\$ 23,183,397	\$ 15,115,101	\$ 38,298,498
Jobs	360	147	507
Wages	\$8,353,520	\$5,925,480	\$14,279,000

## SUMMARY OF THE DATA ANALYSIS

This survey process has helped forge new partnerships between ECNHC and local communities while providing critical information regarding the heritage tourists and their economic impacts, particularly in the East Region. There are clear differences among the visitors depending on the primary purpose for their trips, as well the anticipated differences between day trippers and those who planned an overnight visit to the Corridor. Overnight visitors whose primary reason for their trip was to visit an ECNHC attraction spent significantly more overall, particularly on lodging and other transportation costs. They also spent slightly more on restaurants and bars.

This finding coupled with the knowledge that 57% of all types of visitors explore historic downtowns, while over half of the meals eaten while in the corridor were at locally-owned establishments and nearly half of the shoppers patronize locally-owned business, suggests unique marketing opportunities

These marketing efforts should be guided by the knowledge that the vast majority of visitors are from within New York, many are in the Corridor to visit family and friends and over half are repeat visitors. For marketing purposes, it is important to note that 80% of visitors are 46 years or older, and the primary means of acquiring information about the Corridor are a previous visit, family/friends, and the Internet. Only two visitors received prior information from a travel agent, suggesting the need to inform these strategic partners of the travel opportunities in the region.

Economically, there are clear anticipated difference between day trippers and overnight visitors, even when accounting for the largest difference, lodging expenditures. Furthermore, though the data is limited, it appears that visitors to the West are quite different than their counter parts to the East region. This needs to be better understood to optimize the marketing of the Corridor.

## RECOMMENDATIONS FOR MARKETING & FUTURE RESEARCH

Based on the findings contained in this report, Camoin Associates makes the following recommendations:

1. The data show that a large portion of East Region visitors come back for subsequent visits. Staff may want to consider assisting local partners in promoting less-visited sites for repeat trips. A marketing campaign of “best kept secrets” of the Corridor that rotates packages of varying activities and promotions could be a great way to keep visitors interested in the region and feed more visitors to underutilized sites.
2. Museums and special events appear to be significant draws to the East Region. Based on interviews with heritage sites in the East Region, we know that the New York State Museum in Albany by far attracts the largest number of visitors (746,000 annually). Staff could consider examining the potential benefits of a strong partnership with the Museum to direct patrons to less-visited heritage sites in the East Region. For example, developing a combination of sites by theme and featuring a different combination at the Museum information desk each quarter would be one possibility.
3. The importance of the Internet cannot be overstated when it comes to marketing and promotion. It might be interesting to establish some targeted partnerships with local tourism promotion agencies to increase the number and visibility of vacation packages as a pilot program. It would be important to track the results of this type of program to measure whether it has any impact on visitation and spending.
4. Survey data reveal that a significant portion of visitors rely on family and friends when planning their trip. In addition, half of all meals eaten by visitors to the East Region were purchased at local restaurants. These findings indicate that the best salespeople in terms of promoting the region are local residents and restaurant owners. Another interesting pilot program could be focused on generating more interest in heritage sites among locals to see if that has any impact on annual visitation.
5. There appear to be some potentially significant differences between visitors to the East vs. West Regions. East Region visitors are more likely to be drawn by heritage activities and are more likely to stay in hotels or motels. West Region visitors are more likely to come for a visit with family or friends and spend less money in the local economy. It would be interesting to study these differences further to understand what is driving them.
6. It is clear that most survey respondents are in the 46-75 year old age cohorts and that most travel with immediate family members. However, it is not clear how many of these groups include children, what ages the children may be and what impact



their presence may have on visitor behaviors (activities, where they stay, where they eat, etc.)

7. An assessment of the existing tourism infrastructure in the region may be a useful companion to this survey analysis. It would assist staff in gauging what is available to visitors in terms of lodging and amenities and how this might impact their spending patterns and activity choices.
8. Side trips appear to be a significant source of visitors. It would be useful to know what the primary destination of these visitors is for marketing purposes.
9. The two most useful pieces of information that could be gathered from all ECNHC heritage sites for the purposes of conducting an economic impact analysis are total visitation and zip codes of origin of visitors. If future economic impact analysis is desired, it would be worthwhile to educate heritage sites of the value of collecting this information and making it easily accessible for research purposes.



## Erie Canalway National Heritage Corridor On-site Visitor Survey

To help us to better understand and serve visitors, we are asking randomly selected visitors to complete a short survey. Your participation in this survey is voluntary and all information you provide will be strictly confidential.

1. Are you familiar with the Erie Canalway National Heritage Corridor?  
☐ Very familiar **q1-1**    ☐ Somewhat familiar **q1-2**    ☐ Not sure **q1-3**    ☐ No **q1-4**
2. Is this your first trip to the Erie Canalway National Heritage Corridor?  
☐ Yes **q2-1**    ☐ No **q2-2**    ☐ Not sure **q2-3**
3. Is your trip to the Erie Canalway National Heritage Corridor today part of a:  
☐ Day Trip **q3-1**  
☐ Overnight Trip. If an overnight trip: **q3-2**  
What type of lodging are you using in the local area (that is, within 30 miles of here)?  
☐ Hotel, motel or B&B **q3-3**  
☐ Campground **q3-4**  
☐ Staying with friends or relatives in the area **q3-5**  
☐ Staying overnight outside the local area or just passing through **q3-6**  
☐ Other \_\_\_\_\_ **q3-7**
4. How long do you plan to spend in the local area?  
\_\_\_\_\_ hours, if on a day trip **q4-1**    \_\_\_\_\_ nights, if an overnight trip **q4-2**
5. How many people are in your travel party?  
\_\_\_\_\_ adults (18-61) **q5-1**    \_\_\_\_\_ adults (62 & over) **q5-2**  
\_\_\_\_\_ children (5 and under) **q5-3**    \_\_\_\_\_ children (6-12) **q5-4**    \_\_\_\_\_ children (13-17) **q5-5**
6. U.S. residents: What is the zip code of your permanent residence? \_\_\_\_\_ **q6-1**  
Visitors from outside the U.S, where is your primary residence (country/province)? \_\_\_\_\_ **q6-2**
7. Which of the following kinds of places in the area are you aware of and which of these do you plan to visit on this trip (check all that apply) ?

Places	Aware of?	Plan to visit this trip?	Plan to visit on another trip?
Visitor Centers	<input type="checkbox"/> <b>q7-1</b>	<input type="checkbox"/> <b>q7-2</b>	<input type="checkbox"/> <b>q7-3</b>
Parks	<input type="checkbox"/> <b>q7-4</b>	<input type="checkbox"/> <b>q7-5</b>	<input type="checkbox"/> <b>q7-6</b>
Scenic Areas	<input type="checkbox"/> <b>q7-7</b>	<input type="checkbox"/> <b>q7-8</b>	<input type="checkbox"/> <b>q7-9</b>
Trails	<input type="checkbox"/> <b>q7-10</b>	<input type="checkbox"/> <b>q7-11</b>	<input type="checkbox"/> <b>q7-12</b>
Marinas	<input type="checkbox"/> <b>q7-13</b>	<input type="checkbox"/> <b>q7-14</b>	<input type="checkbox"/> <b>q7-15</b>
Canal harbors	<input type="checkbox"/> <b>q1-16</b>	<input type="checkbox"/> <b>q1-17</b>	<input type="checkbox"/> <b>q1-18</b>
Locks/Canal from the water	<input type="checkbox"/> <b>q7-19</b>	<input type="checkbox"/> <b>q7-20</b>	<input type="checkbox"/> <b>q7-21</b>
Museums	<input type="checkbox"/> <b>q7-22</b>	<input type="checkbox"/> <b>q7-23</b>	<input type="checkbox"/> <b>q7-24</b>
Festivals/Performances	<input type="checkbox"/> <b>q7-25</b>	<input type="checkbox"/> <b>q7-26</b>	<input type="checkbox"/> <b>q7-27</b>

<b>Places</b>	<b>Aware of?</b>	<b>Plan to visit this trip?</b>	<b>Plan to visit on another trip?</b>
Historic Sites	<input type="checkbox"/> q7-28	<input type="checkbox"/> q7-29	<input type="checkbox"/> q7-30
Historic downtowns	<input type="checkbox"/> q7-31	<input type="checkbox"/> q7-32	<input type="checkbox"/> q7-33
Shops	<input type="checkbox"/> q7-34	<input type="checkbox"/> q7-35	<input type="checkbox"/> q7-36
Restaurants	<input type="checkbox"/> q7-37	<input type="checkbox"/> q7-38	<input type="checkbox"/> q7-39
Local farmers markets	<input type="checkbox"/> q7-40	<input type="checkbox"/> q7-41	<input type="checkbox"/> q7-42
Other _____	<input type="checkbox"/> q7-43	<input type="checkbox"/> q7-44	<input type="checkbox"/> q7-45

- 8 Was one or more of these places the primary reason for your trip to this area? ☐ Yes q8-1 ☐ No q8-2  
If yes, please specify which kind of place and place name. \_\_\_\_\_ q8-3

9. What brought you to the site *today* (check all that apply)?

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Special event q9-1        | <input type="checkbox"/> Recreational activity q9-2       | <input type="checkbox"/> A family-friendly program q9-3               |
| <input type="checkbox"/> Camping q9-4              | <input type="checkbox"/> Educational activity q9-5        | <input type="checkbox"/> Historic/cultural resources q9-6             |
| <input type="checkbox"/> Picnicing q9-7            | <input type="checkbox"/> Happened upon the site q9-8      | <input type="checkbox"/> Enjoyment of scenic or national setting q9-9 |
| <input type="checkbox"/> Guided tour or walk q9-10 | <input type="checkbox"/> Shopping in site gift shop q9-11 | <input type="checkbox"/> Other _____ q9-12                            |

Would you be willing to complete a follow-up survey after your trip is over? If so, please provide your mailing address below and we will send you a survey with a self-addressed stamped envelop. The information that you provide will be valuable in our planning efforts. All personal information will be kept confidential.

***Complete a follow-up survey and receive a screensaver CD featuring winners of the Erie Canalway National Heritage Corridor Photo Contest as a thank you!***

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Thank you for your time.**

**We hope that you enjoy your visit to  
the Erie Canalway National Heritage Corridor!**

Survey Number _____	Date _____
Survey Volunteer _____	Day of week _____
Survey Site _____	Time of day _____
Sampling Location at Site _____	



## Erie Canalway National Heritage Corridor Mail-back Visitor Survey

On a recent trip to the Erie Canalway National Heritage Corridor (NHC), you participated in a brief survey and indicated that you would be willing to answer some follow-up questions. Many thanks for taking the time to help us understand our visitors' needs. By providing more details about yourself and your trip, you can help us serve future visitors. Please complete this form and return it in the postage-paid envelope.

**For the purposes of this survey, the TRIP is defined as the visit (one day or an extended stay) that you were on when you participated in the On-site Survey.**

1. Including this trip, how many visits have you made to the Erie Canalway National Heritage Corridor during your lifetime? \_\_\_\_\_ **q1-1**  
How many visits have you made in the last 12 months? \_\_\_\_\_ **q1-2**

2. What was the primary purpose of this trip? (check one)

☐ To visit Erie Canalway National Heritage Corridor attractions **q2-1**

Please specify \_\_\_\_\_

☐ The Erie Canalway NHC was a side trip or stop on a trip to other primary destinations **q2-2**

☐ Visiting friends or relatives in the area **q2-3**

☐ Business or combined business/pleasure trip **q2-4**

☐ School trip **q2-5**

☐ Special event, program or festival. **q2-6** Please specify \_\_\_\_\_

3. On this trip, what forms of transportation did you and your group use to arrive at and travel within the Erie Canalway National Heritage Corridor (check all that apply)?

### Travel to the Erie Canalway NHC

- ☐ personal vehicle **q3-1**  
☐ rental vehicle **q3-2**  
☐ bus **q3-3**  
☐ tour bus **q3-4**  
☐ train **q3-5**  
☐ plane **q3-6**  
☐ boat (motorized, owned) **q3-7**  
☐ boat (motorized, rented) **q3-8**  
☐ boat (non-motorized, owned) **q3-9**  
☐ boat (non-motorized, rented) **q3-10**  
☐ tour boat **q3-11**  
☐ bike **q3-12**  
☐ foot **q3-13**  
☐ Other \_\_\_\_\_ **q3-14**

### Travel within the Erie Canalway NHC

- ☐ personal vehicle **q3-15**  
☐ rental vehicle **q3-16**  
☐ bus **q3-17**  
☐ tour bus **q3-18**  
☐ train **q3-19**  
☐ plane **q3-20**  
☐ boat (motorized, owned) **q3-21**  
☐ boat (motorized, rented) **q3-22**  
☐ boat (non-motorized, owned) **q3-23**  
☐ boat (non-motorized, rented) **q3-24**  
☐ tour boat **q3-25**  
☐ bike **q3-26**  
☐ foot **q3-27**  
☐ Other \_\_\_\_\_ **q3-28**

4. On this trip, what kind of personal group (not guided tour/school group) were you with? (check all that apply):

☐ I was alone **q4-1**

☐ Family (immediate) **q4-2**

☐ Relatives (from the Erie Canalway NHC) **q4-7**

☐ Relatives (outside of the Erie Canalway NHC) **q4-8**

- ☐ Friends **q4-3**
☐ Retirees **q4-9**  
☐ Professional colleagues **q4-4**
☐ Pets **q4-10**  
☐ A group member with a physical condition that made it difficult to access the sites or participate in activities or services in the Erie Canalway National Heritage Corridor **q4-5**  
☐ Other \_\_\_\_\_ **q4-6**

5. How much time did you spend in the Erie Canalway National Heritage Area on this trip?

If this was a daytrip, \_\_\_\_\_ hours **q5-1**

If this was an overnight trip, \_\_\_\_\_ nights **q5-2**

What type of lodging did you use in the Erie Canalway NHC (check all that apply)?

- |  |  |
|--|--|
| <input type="checkbox"/> Chain hotel/motel <b>q5-3</b>       | <input type="checkbox"/> Stayed with relatives <b>q5-7</b> |
| <input type="checkbox"/> Local hotel/motel <b>q5-4</b>       | <input type="checkbox"/> Stayed with friends <b>q5-8</b>   |
| <input type="checkbox"/> Bed and Breakfast (B&B) <b>q5-5</b> | <input type="checkbox"/> Boat <b>q5-9</b>                  |
| <input type="checkbox"/> Campground <b>q5-6</b>              | <input type="checkbox"/> Other _____ <b>q5-10</b>          |

6. Prior to this trip, how did you/your group obtain information about the area? (check all that apply)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Previous visit <b>q6-1</b>   | <input type="checkbox"/> Web/Internet site <b>q6-6</b>    | <input type="checkbox"/> Family/Friends/Word of mouth <b>q6-11</b> |
| <input type="checkbox"/> Visitor center <b>q6-2</b>   | <input type="checkbox"/> Highway/Road sign <b>q6-7</b>    | <input type="checkbox"/> Erie Canalway NHC brochure <b>q6-12</b>   |
| <input type="checkbox"/> TV/Radio <b>q6-3</b>         | <input type="checkbox"/> Program flyer/poster <b>q6-8</b> | <input type="checkbox"/> Travel agent/Tour operator <b>q6-13</b>   |
| <input type="checkbox"/> Newsletter <b>q6-4</b>       | <input type="checkbox"/> Newspaper/Magazine <b>q6-9</b>   | <input type="checkbox"/> NYS Tourism Office, website <b>q6-14</b>  |
| <input type="checkbox"/> Travel guide/map <b>q6-5</b> | <input type="checkbox"/> Conference planner <b>q6-10</b>  | <input type="checkbox"/> NYS Tourism Office, 1-800# <b>q6-15</b>   |

7. On this visit, what activities did you and your personal group participate in? (check all that apply)

- ☐ Heritage activities, such as visiting a historic site or taking an architectural tour **q7-1**  
☐ Cultural activities, such as concerts and gallery visits **q7-2**  
☐ Outdoor recreation, such as walking or biking **q7-3**  
☐ Water-based activities, such as boating or fishing **q7-4**  
☐ Special event, such as a festival **q7-5**  
☐ Visiting family and/or friends **q7-6**  
☐ Business activities **q7-7**  
☐ Other \_\_\_\_\_ **q7-8**

8. Did you shop during your trip? ☐ Yes **q8-1** ☐ No **q8-2**

If you shopped, how much time on your trip did you spend shopping?

- ☐ Very little **q8-3**
☐ About half of our visit **q8-4**
☐ Most of the visit **q8-5**

If you shopped, what percentage of your shopping time was spent in the following areas? Please write "0" if no time was spent in a particular area.

Modern malls \_\_\_\_\_ % **q8-6**

Historic downtowns \_\_\_\_\_ % **q8-7**

Other (Please specify) \_\_\_\_\_ % **q8-8**

If you spent money while shopping, what percentage of the dollar amount was spent in the following outlets? Please write "0" if no money was spent in a particular category.

Chain stores \_\_\_\_\_ % **q8-9**

Locally owned stores \_\_\_\_\_ % **q8-10**

Attraction gift shop (whether locally owned or a chain store) \_\_\_\_\_ % **q8-11**

9. Did you dine-in or eat out during your trip? ☐ Yes **q9-1** ☐ No **q9-2**

If you dined-in or ate out, what percentage of your meals were of the following types?

Please write "0" if no money was spent in a particular category.

That you prepared yourself? \_\_\_\_\_ % **q9-3**

Was prepared by local relatives? \_\_\_\_\_ % **q9-4**  
 Was purchased at a chain restaurant? \_\_\_\_\_ % **q9-5**  
 Was purchased at a local (non-chain) restaurant? \_\_\_\_\_ % **q9-6**

10. For your personal group, please report all expenditures for the items listed below during this visit to the Erie Canalway National Heritage Corridor. Only report items that were **directly related** to your visit to the Erie Canalway NHC (see map enclosed) not expenses from other areas that you visited. If you were part of a larger group, report just your own expenses or those of your immediate party. Report all expenses whether by cash, credit card, or check to the nearest dollar, including any pre-paid expenses. Exclude airfares. Please write "0" if no money was spent in a particular category.

<b>Spending Category</b>	<b>Spending by your travel party</b>
Lodging (hotel/motel, B&B, cabins, campground, etc.)	\$ _____ <b>q10-1</b>
Restaurants and bars	\$ _____ <b>q10-2</b>
Groceries and take-out food	\$ _____ <b>q10-3</b>
Gas and oil (auto, RV, boat, etc.)	\$ _____ <b>q10-4</b>
Other transportation expenses (rental fees, tolls, repairs)	\$ _____ <b>q10-5</b>
Admissions (entertainment, recreation, museums)	\$ _____ <b>q10-6</b>
Shopping (clothes, souvenirs, books, etc.)	\$ _____ <b>q10-7</b>

11. How many people do these expenses cover? Please write "0" if the expenditures do not include any children. \_\_\_\_\_ Adults **q11-1** \_\_\_\_\_ Children (< 18) **q11-2**

12. Please mark those factors below that are important to having a satisfactory travel experience for you, and mark how well your expectations for quality were met on this trip to the Erie Canalway National Heritage Corridor:

<b>Factor</b>	<b>Important</b>	<b>Expectations for quality were met</b>	<b>Needs improvement</b>
Directions to sites (signage)	<input type="checkbox"/> <b>q12-1</b>	<input type="checkbox"/> <b>q12-18</b>	<input type="checkbox"/> <b>q12-35</b>
Directions to sites (maps)	<input type="checkbox"/> <b>q12-2</b>	<input type="checkbox"/> <b>q12-19</b>	<input type="checkbox"/> <b>q12-36</b>
Traffic	<input type="checkbox"/> <b>q12-3</b>	<input type="checkbox"/> <b>q12-20</b>	<input type="checkbox"/> <b>q12-37</b>
Parking	<input type="checkbox"/> <b>q12-4</b>	<input type="checkbox"/> <b>q12-21</b>	<input type="checkbox"/> <b>q12-38</b>
Handicapped accessibility	<input type="checkbox"/> <b>q12-5</b>	<input type="checkbox"/> <b>q12-22</b>	<input type="checkbox"/> <b>q12-39</b>
Educational programs/tours	<input type="checkbox"/> <b>q12-6</b>	<input type="checkbox"/> <b>q12-23</b>	<input type="checkbox"/> <b>q12-40</b>
Special event	<input type="checkbox"/> <b>q12-7</b>	<input type="checkbox"/> <b>q12-24</b>	<input type="checkbox"/> <b>q12-41</b>
Exhibits	<input type="checkbox"/> <b>q12-8</b>	<input type="checkbox"/> <b>q12-25</b>	<input type="checkbox"/> <b>q12-42</b>
Staff knowledge	<input type="checkbox"/> <b>q12-9</b>	<input type="checkbox"/> <b>q12-26</b>	<input type="checkbox"/> <b>q12-43</b>
Cleanliness and upkeep	<input type="checkbox"/> <b>q12-10</b>	<input type="checkbox"/> <b>q12-27</b>	<input type="checkbox"/> <b>q12-44</b>
Hours of site operation	<input type="checkbox"/> <b>q12-11</b>	<input type="checkbox"/> <b>q12-28</b>	<input type="checkbox"/> <b>q12-45</b>
Cost of site or activities	<input type="checkbox"/> <b>q12-12</b>	<input type="checkbox"/> <b>q12-29</b>	<input type="checkbox"/> <b>q12-46</b>
Safety and security	<input type="checkbox"/> <b>q12-13</b>	<input type="checkbox"/> <b>q12-30</b>	<input type="checkbox"/> <b>q12-47</b>
Friendliness and hospitality	<input type="checkbox"/> <b>q12-14</b>	<input type="checkbox"/> <b>q12-31</b>	<input type="checkbox"/> <b>q12-48</b>
Shopping opportunities	<input type="checkbox"/> <b>q12-15</b>	<input type="checkbox"/> <b>q12-32</b>	<input type="checkbox"/> <b>q12-49</b>
Recreational opportunities	<input type="checkbox"/> <b>q12-16</b>	<input type="checkbox"/> <b>q12-33</b>	<input type="checkbox"/> <b>q12-50</b>
Restaurants/Food	<input type="checkbox"/> <b>q12-17</b>	<input type="checkbox"/> <b>q12-34</b>	<input type="checkbox"/> <b>q12-51</b>

13. Is there anything else that you would like to tell us about your trip to the Erie Canalway National Heritage Corridor? Please provide any comments in the space below and on the back of this sheet.  
**q13-1**

14. Are you ☐ Male **q14-1** ☐ Female **q14-2**
15. What is your age?  
☐ 18-25 **q15-1** ☐ 26-35 **q15-2** ☐ 36-45 **q15-3** ☐ 46-55 **q15-4**  
☐ 56-65 **q15-5** ☐ 66-75 **q15-6** ☐ 76 and over **q15-7**
16. Which category best represents your annual household income during the past year?  
☐ Under \$24,999 **q16-1** ☐ \$25,000 - \$34,999 **q16-2** ☐ \$35,000 - \$49,999 **q16-3**  
☐ \$50,000 - \$74,999 **q16-4** ☐ \$75,000 - \$99,999 **q16-5** ☐ \$100,000 or more **q16-6**
17. What is the highest level of formal education that you have completed?  
☐ Less than high school **q17-1** ☐ Two-year college degree **q17-6**  
☐ Some high school **q17-2** ☐ Four-year undergraduate degree **q17-7**  
☐ High school graduate **q17-3** ☐ Graduate degree **q17-8**  
☐ Vocational/trade school certificate **q17-4**  
☐ Some college **q17-5**

Please return the survey in the postage-paid self-addressed envelope provided. If you have any questions, please contact Hannah Blake at (518) 237-7000, ext. 202 or [hannah\\_blake@nps.gov](mailto:hannah_blake@nps.gov).

**Thank you for taking the time to complete this survey!**

Erie Canalway National Heritage Corridor

P.O. Box 219

Waterford, NY 12188

[www.eriecanalway.org](http://www.eriecanalway.org)

Survey Number \_\_\_\_\_ Date Sent \_\_\_\_\_ Date Returned \_\_\_\_\_

This information will be used by Erie Canalway National Heritage Corridor managers to better serve the public. Response to this request is voluntary. No action may be taken against you for refusing to supply the information requested.