



Central New York Travel Market Research

Prepared for:

- *Cayuga County Office of Tourism*
- *Cortland County Convention & Visitors Bureau*
- *Madison County Tourism*
- *Syracuse Convention & Visitors Bureau*
- *Oswego County Tourism*

Study Conducted: Jan, 2015 – May, 2015

Preliminary Data Review: May 27, 2015

Research Presentation: July 27, 2015

Research Team Experience

- Destination research and strategic planning
- Development and management of conference centers
- Research for 100+ destinations in 26 states
- Communities, regions and states
- Travel industry focused
- National research data and trends analysis
- Writing and speaking
- Board workshops & planning sessions
- Listening to travelers

General Research & Findings Overview

1

Client Meeting, Destination and Organization Review

- Reconnaissance conducted January , 2015 by Berkeley Young & Alexa Gifford

2

Visitor Profile Research by Market Segment (online surveys):

- **9,305 surveys collected as part of a 5-county regional study**
- **A total of 66 partner survey weblinks**, Facebook posts and webpage links were created by YSI and used by the 5-county regional partners to distribute the 2015 Central NY Visitor Survey to visitors throughout Central New York..

3

Assess the current segmentation of overnight and daytripper visitation and visitor behavior to Central New York

4

Evaluate overall ROI potential for Central New York marketing programs

5

Create a list of development / policy / organizational objectives.



The Economic Impact of Tourism in New York

2014 Calendar Year



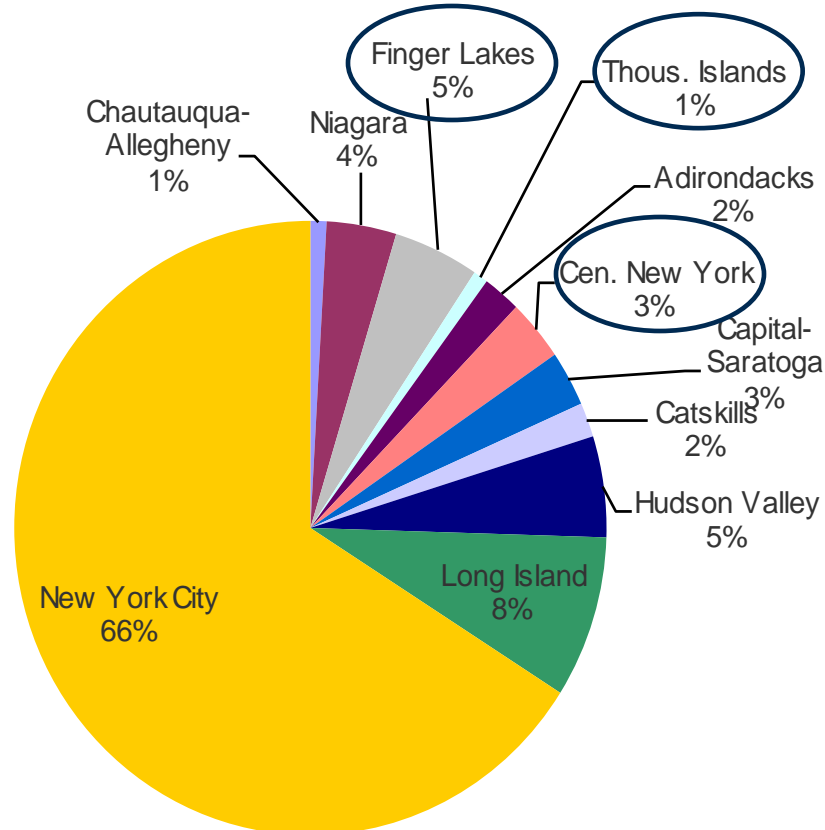
TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

New York State Regional Summary

Traveler spending by region

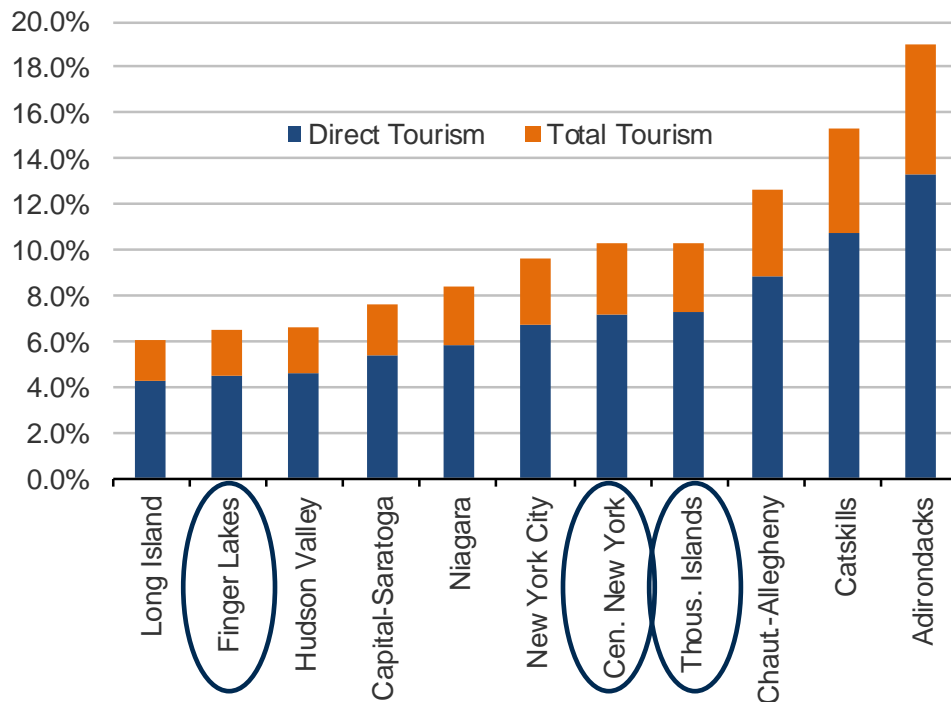
Traveler Spending, 2014



- New York State is divided into 11 economic regions.
- New York City is the largest single tourism region with 66% of state visitor spend.
- New York City, Long Island and Hudson Valley together comprise nearly 80% of New York State traveler spend.

Reliance on tourism

Tourism Share of Regional Employment in 2014

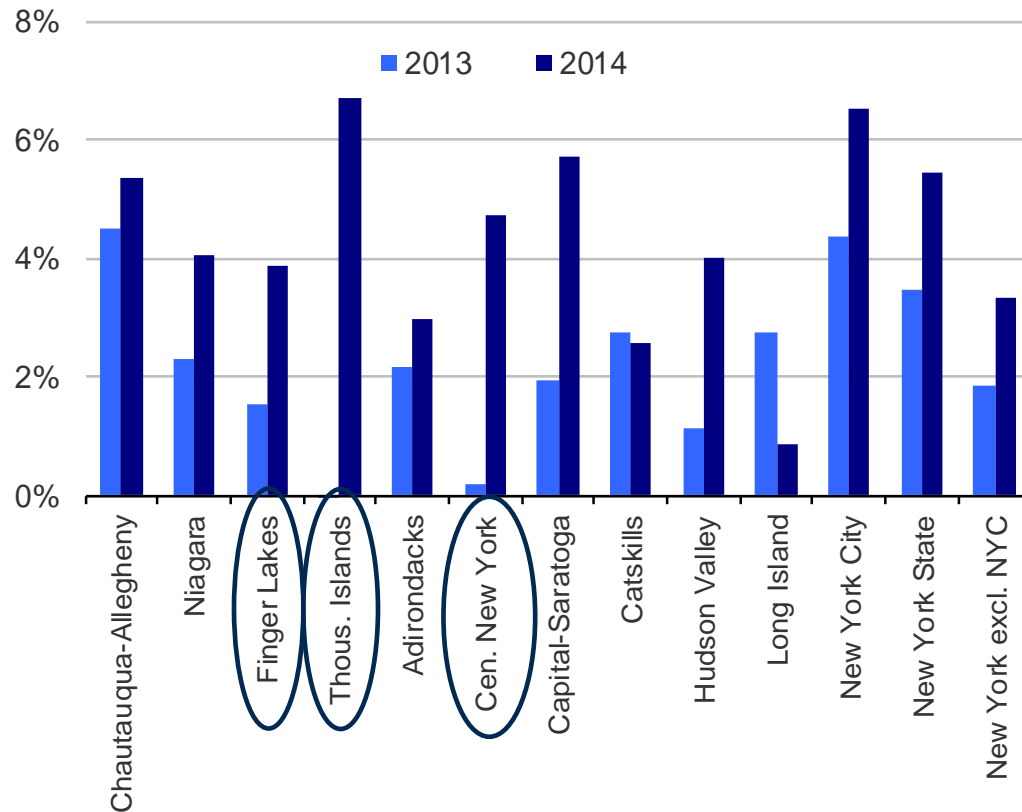


- Tourism is an integral part of every region's economy, generating from 6% to 19% of employment.
- Tourism is most important to the Adirondacks and Catskills, generating 19% and 15% of total employment, respectively.

Note: All regional and county tourism shares are calculated using QCEW (ES-202) employment and wage totals as produced by the NYS Dept. of Labor.

Traveler spending growth

Growth in Traveler Spending








- Traveler spending rose across most regions of the state last year.
- The strongest gains were experienced by Thousand Islands and New York City.
- For most regions, growth accelerated in 2014.

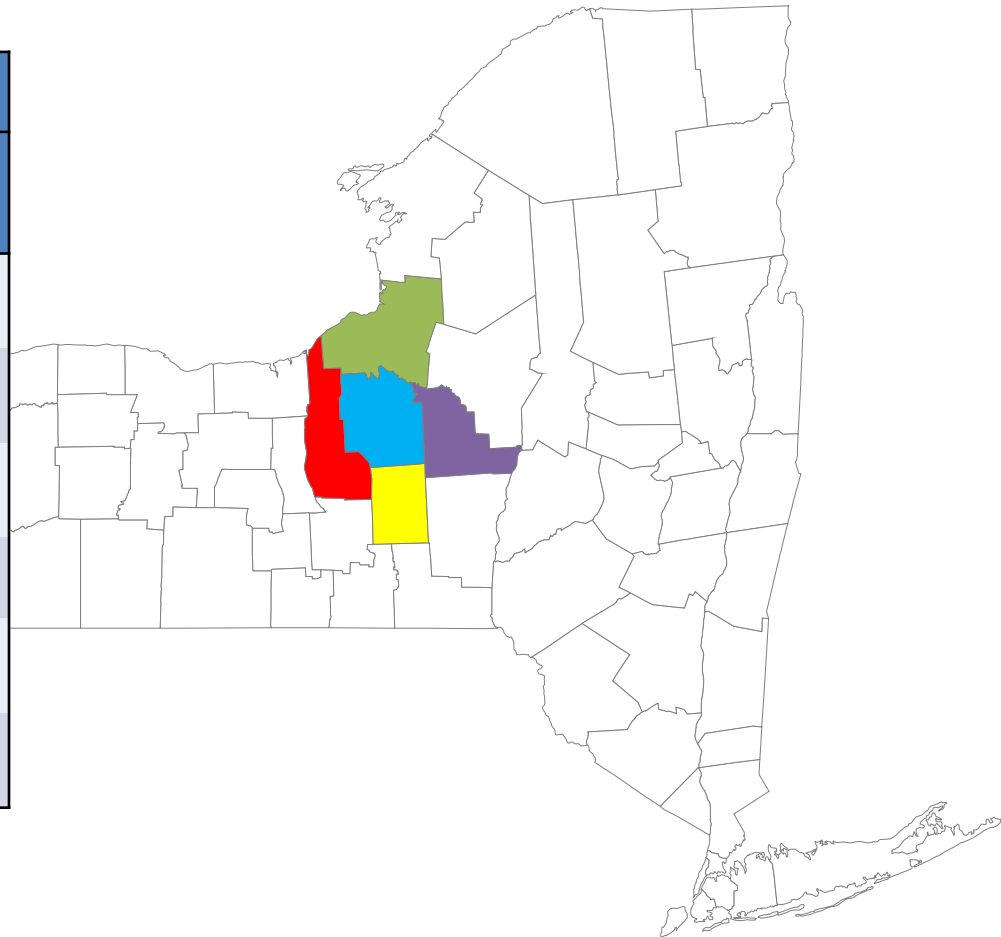
Regional growth

Traveler Spend Year-Over-Year Comparison

Traveler Spend '000s	2012	2013	2014	2014 / 2013 %
1. Chautauqua-Allegheny	\$ 497,549	\$ 519,918	\$ 547,646	5.3%
2. Greater Niagara	\$ 2,232,241	\$ 2,283,154	\$ 2,375,019	4.0%
3. Finger Lakes	\$ 2,767,948	\$ 2,810,302	\$ 2,919,091	3.9%
4. Thousand Islands	\$ 480,591	\$ 466,760	\$ 498,032	6.7%
5. Adirondacks	\$ 1,231,718	\$ 1,258,061	\$ 1,295,258	3.0%
6. Central New York	\$ 1,921,589	\$ 1,925,178	\$ 2,015,943	4.7%
7. Capital-Saratoga	\$ 1,689,826	\$ 1,722,114	\$ 1,820,582	5.7%
8. Catskills	\$ 1,070,983	\$ 1,100,551	\$ 1,128,816	2.6%
9. Hudson Valley	\$ 3,154,900	\$ 3,190,823	\$ 3,318,441	4.0%
10. Long Island	\$ 5,140,592	\$ 5,280,732	\$ 5,326,342	0.9%
11. New York City	\$ 37,069,055	\$ 38,687,493	\$ 41,209,798	6.5%
TOTAL	\$ 57,256,992	\$ 59,245,086	\$ 62,454,969	5.4%

Central New York

		Visitor Spending		
County		FY2013 ('000)	FY2014 ('000)	% Change
 CAYUGA		\$91,703	\$100,952	6.3%
 ONONDAGA		\$808,297	\$863,244	6.8%
 OSWEGO		\$122,733	\$135,256	10.2%
 CORTLAND		\$69,889	\$70,218	0.5%
 MADISON		\$80,811	\$83,746	3.6%
All NY		\$59,245,086	\$62,454,969	5.4%

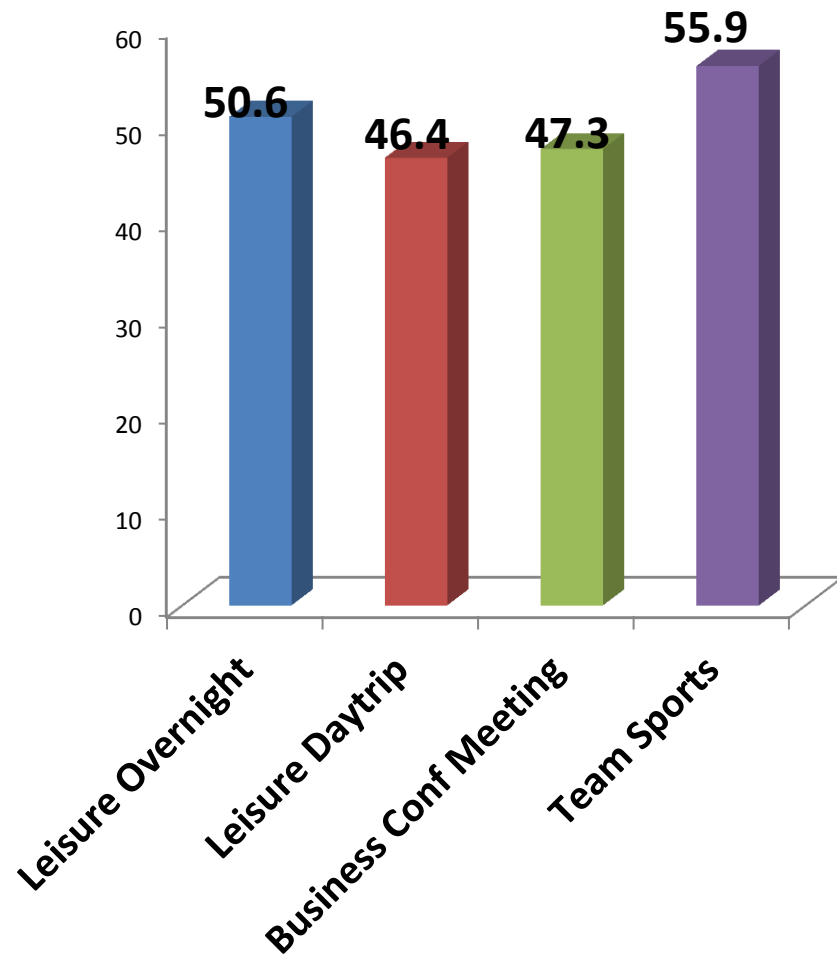




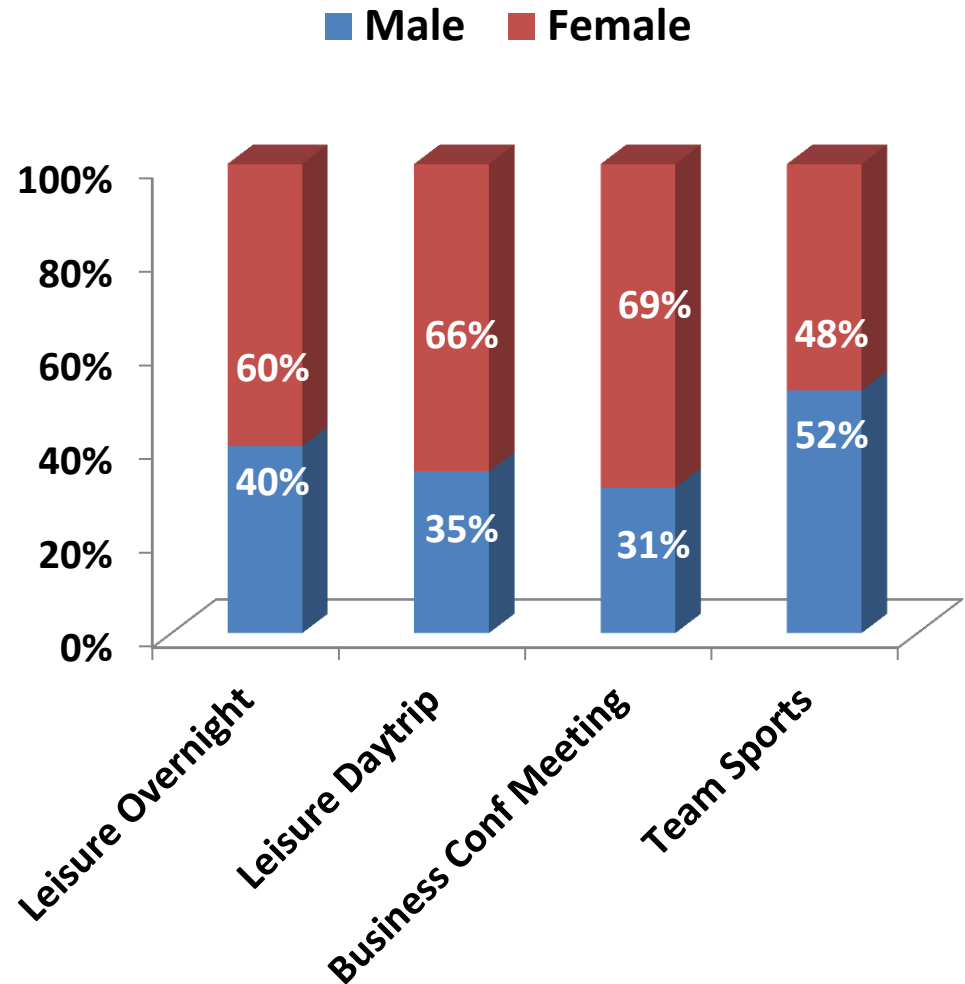
Central New York Visitor Profile 3,413 Visitor Surveys

**Leisure Overnight n=1,711
Leisure Daytrip n=505
International =
Business/Conf/Mtg/University n=406
Team Sports n=152**

Average Age of Respondents

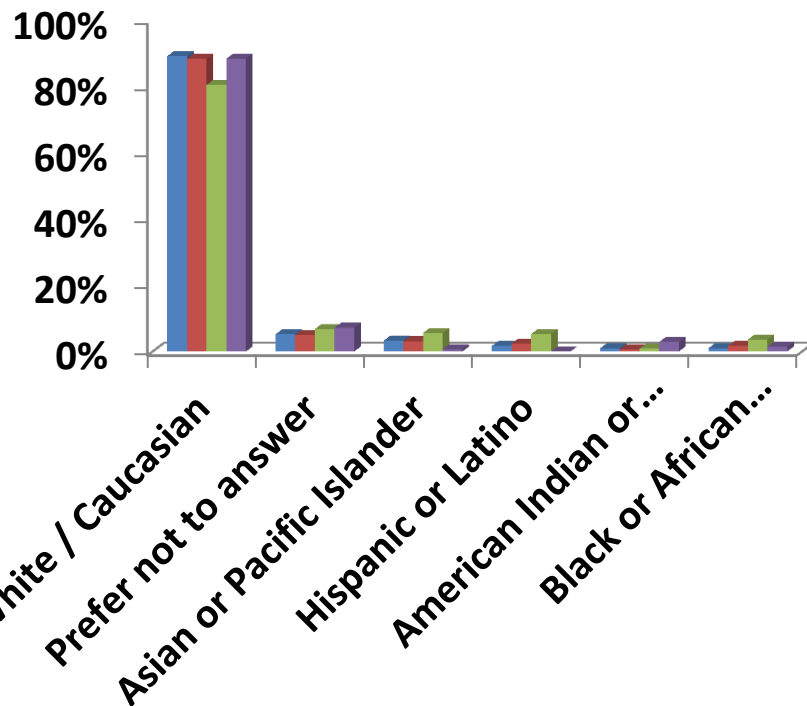


Gender of Respondents



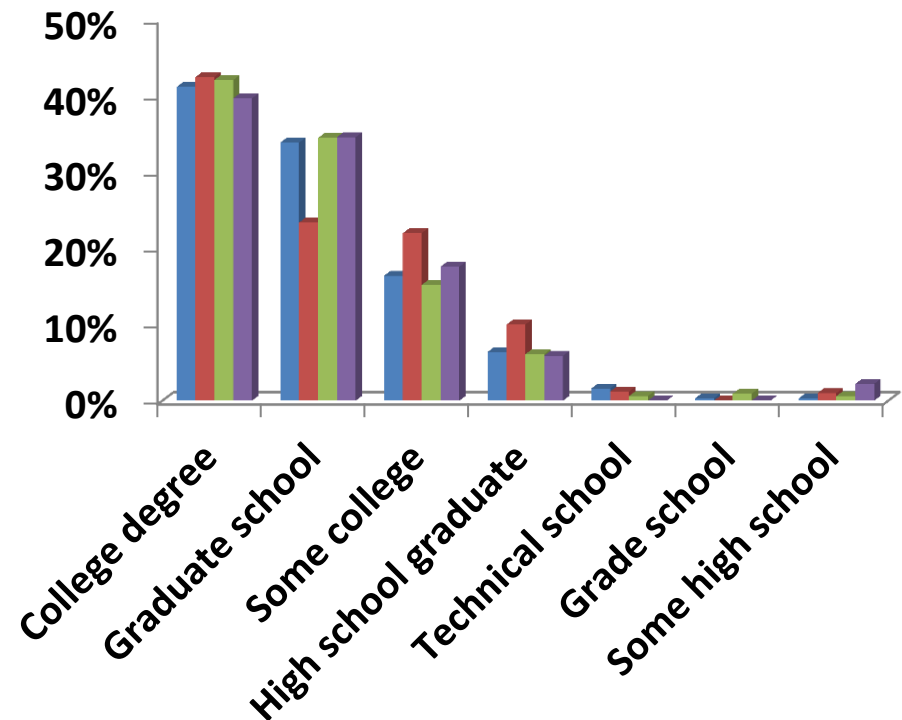
Ethnicity

Leisure Overnight Leisure Daytrip



Level of Education

Leisure Overnight Leisure Daytrip



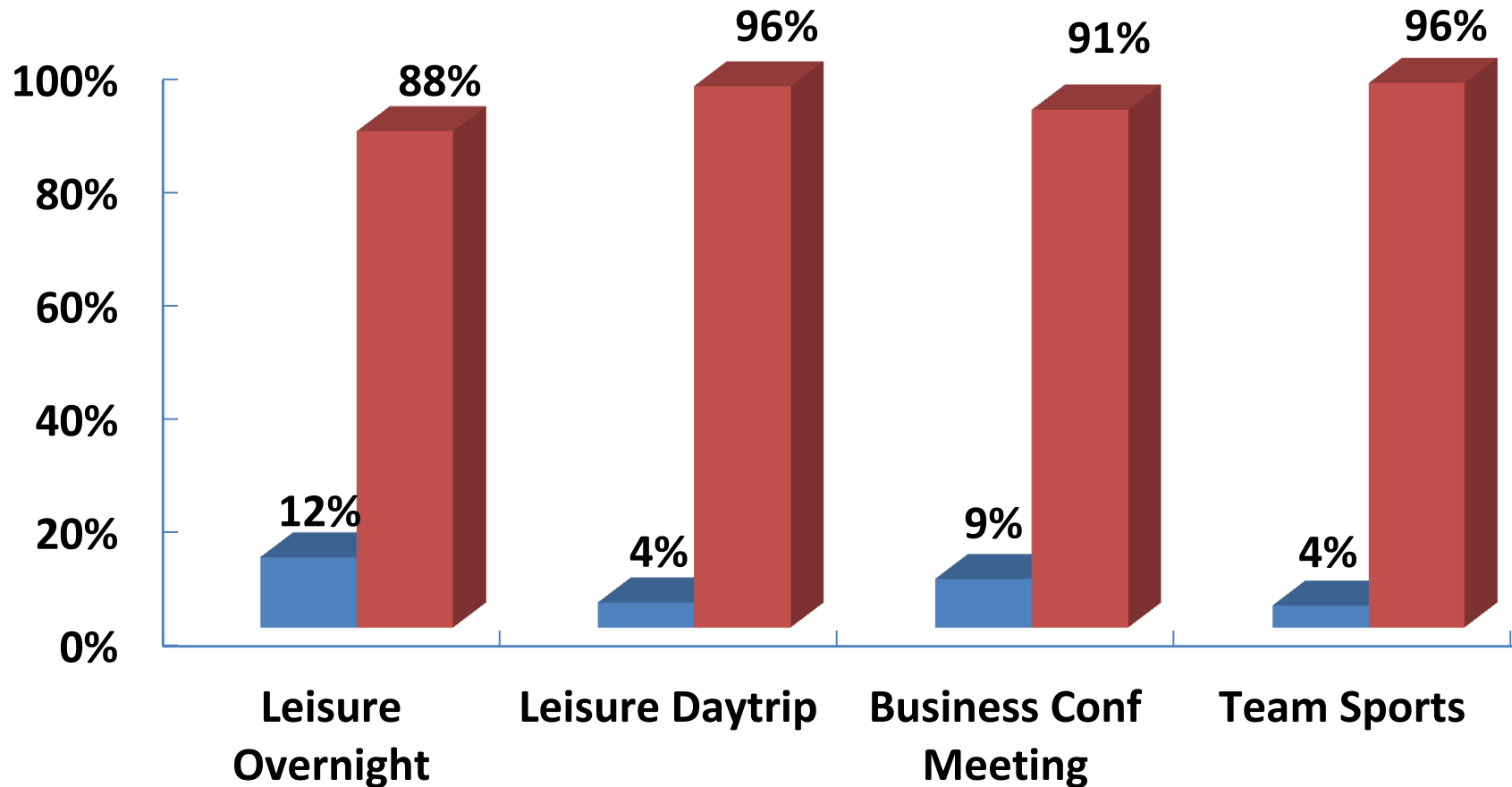
What is your occupation?

Response Category	Leisure Overnight Domestic	Leisure Overnight International	Leisure Daytrip	Business Conf Meeting	Team Sports
Retired	23.2%	17.3%	16.8%	8.0%	34.1%
Healthcare industry	10.6%	9.4%	12.5%	8.9%	8.5%
Education-professor / teacher	10.4%	7.1%	10.4%	12.9%	9.3%
Executive / manager	7.2%	8.3%	5.3%	7.7%	6.2%
Government / military	6.9%	4.7%	5.3%	4.3%	4.7%
Professional / technical	6.6%	3.5%	7.6%	7.7%	10.9%
Self-employed	4.4%	22.4%	5.1%	6.8%	4.7%
IT / technology	4.2%	7.1%	5.3%	2.2%	3.1%
Banking / Financial	3.8%	5.1%	3.6%	5.2%	3.1%
Homemaker / stay at home parent	3.3%	2.8%	3.6%	4.9%	2.3%
Sales / buyer	3.2%	3.5%	3.8%	3.1%	0.8%
Secretary / clerk / office	2.9%	2.4%	5.3%	2.8%	0.8%
Attorney / legal	2.8%	0.4%	1.0%	1.5%	2.3%
Student	2.2%	1.6%	6.1%	11.4%	2.3%
Arts / entertainment	1.9%	1.6%	0.8%	4.3%	0.8%
Human Resources	1.8%	0.0%	0.8%	2.2%	2.3%
Hospitality / tourism	1.6%	1.6%	1.3%	2.5%	1.6%
Craft / mechanical / factory	1.1%	1.2%	2.8%	0.9%	1.6%
Real Estate	1.1%	0.0%	0.5%	0.9%	0.0%
Religious / clergy	0.3%	0.0%	0.0%	0.6%	0.0%
Unemployed	0.3%	0.0%	2.0%	1.2%	0.8%

Have you visited CNY previously?

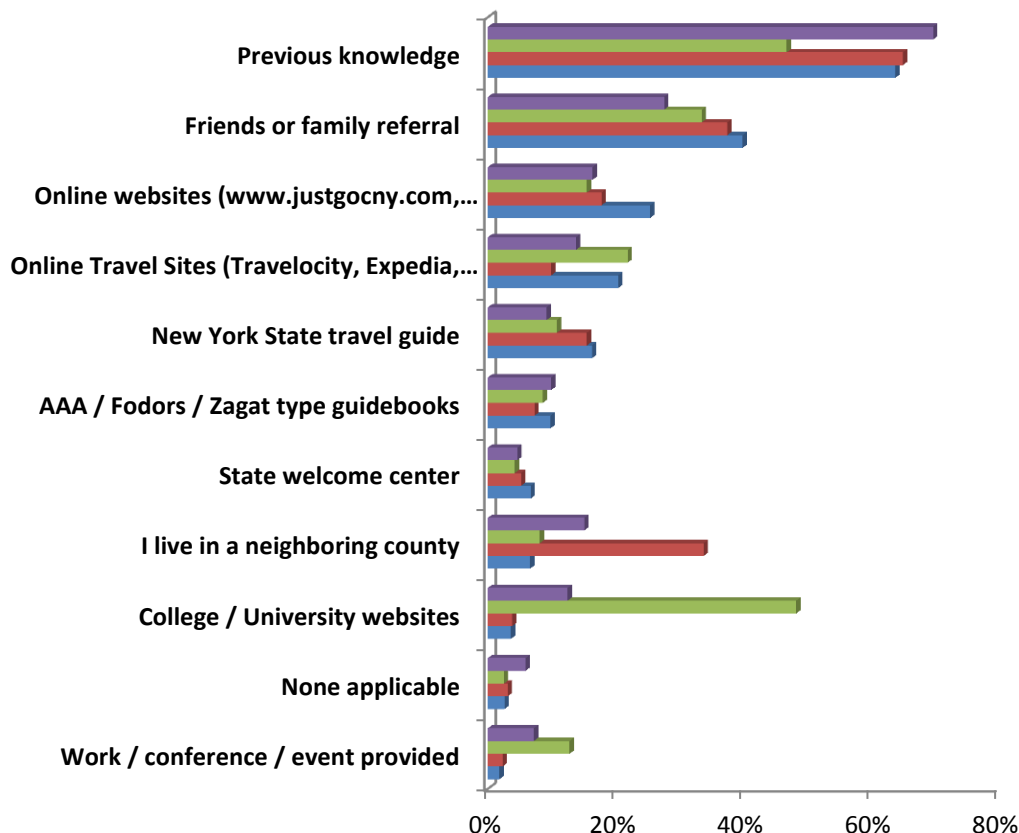
■ First-time Visitor

■ Previously Visited



What information or trip planning sources did you use to plan your most recent trip to Central New York?

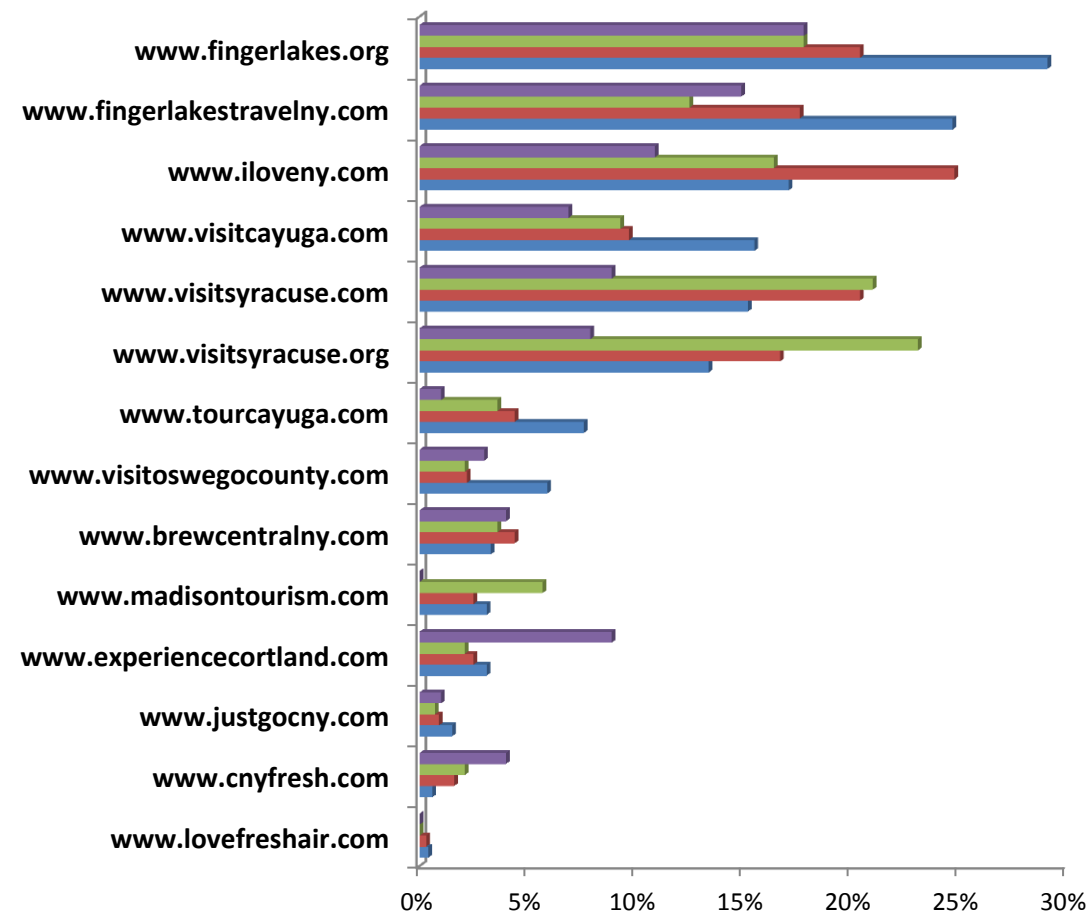
■ Team Sports
 ■ Business Conf Meeting
 ■ Leisure Daytrip
 ■ Leisure Overnight



Leisure Overnight	Domestic	International
Previous knowledge	64.3%	62.2%
Friends or family referral	41.3%	31.6%
Online websites	24.5%	30.3%
Other	16.8%	11.2%
Online Travel Sites	16.5%	45.2%
New York State travel guide	15.9%	19.0%
AAA / Fodors / Zagat type guidebooks	10.0%	7.8%
I live in a neighboring county	6.8%	6.8%
State welcome center	6.3%	8.8%
College / University websites	3.8%	2.0%
None applicable	2.8%	2.0%
Work / conference / event provided	1.9%	1.4%

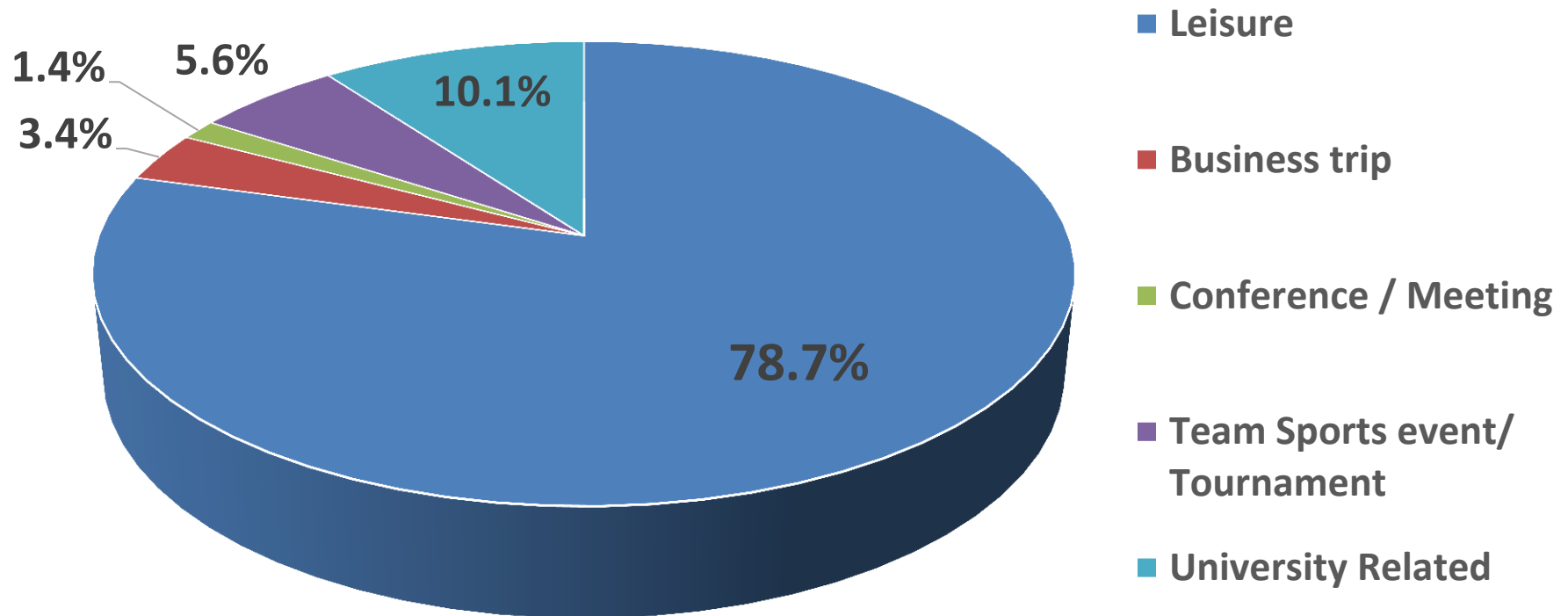
What specific websites did you use to plan your most recent visit to Central New York?

Team Sports Business Conf Meeting Leisure Daytrip Leisure Overnight

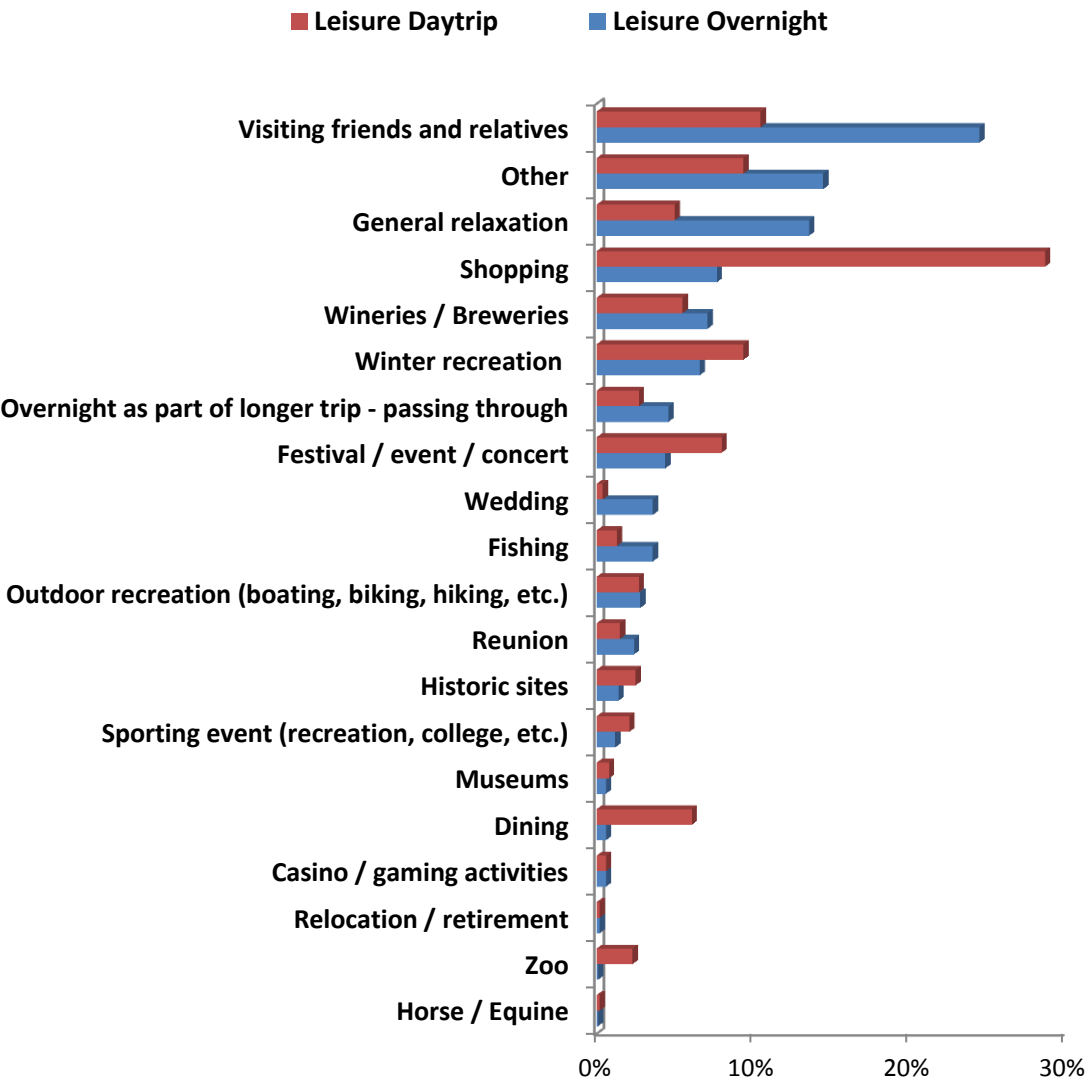


Leisure Overnight	Domestic	International
Other	36.2%	27.2%
www.fingerlakes.org	30.0%	21.9%
www.fingerlakestravelny.com	24.6%	21.5%
www.iloveny.com	18.6%	10.1%
www.visitcayuga.com	16.9%	7.0%
www.visitsyracuse.com	11.9%	36.8%
www.visitsyracuse.org	11.3%	25.4%
www.tourcayuga.com	7.6%	5.7%
www.visitoswegocounty.com	6.2%	3.5%
www.brewcentralny.com	3.7%	0.9%
www.madisontourism.com	3.4%	1.3%
www.experiencecortland.com	3.1%	2.2%
www.justgocny.com	1.4%	1.8%
www.cnyfresh.com	0.5%	1.3%
www.lovefreshair.com	0.4%	0.9%

What was the MAIN purpose for your most recent trip to Central New York?



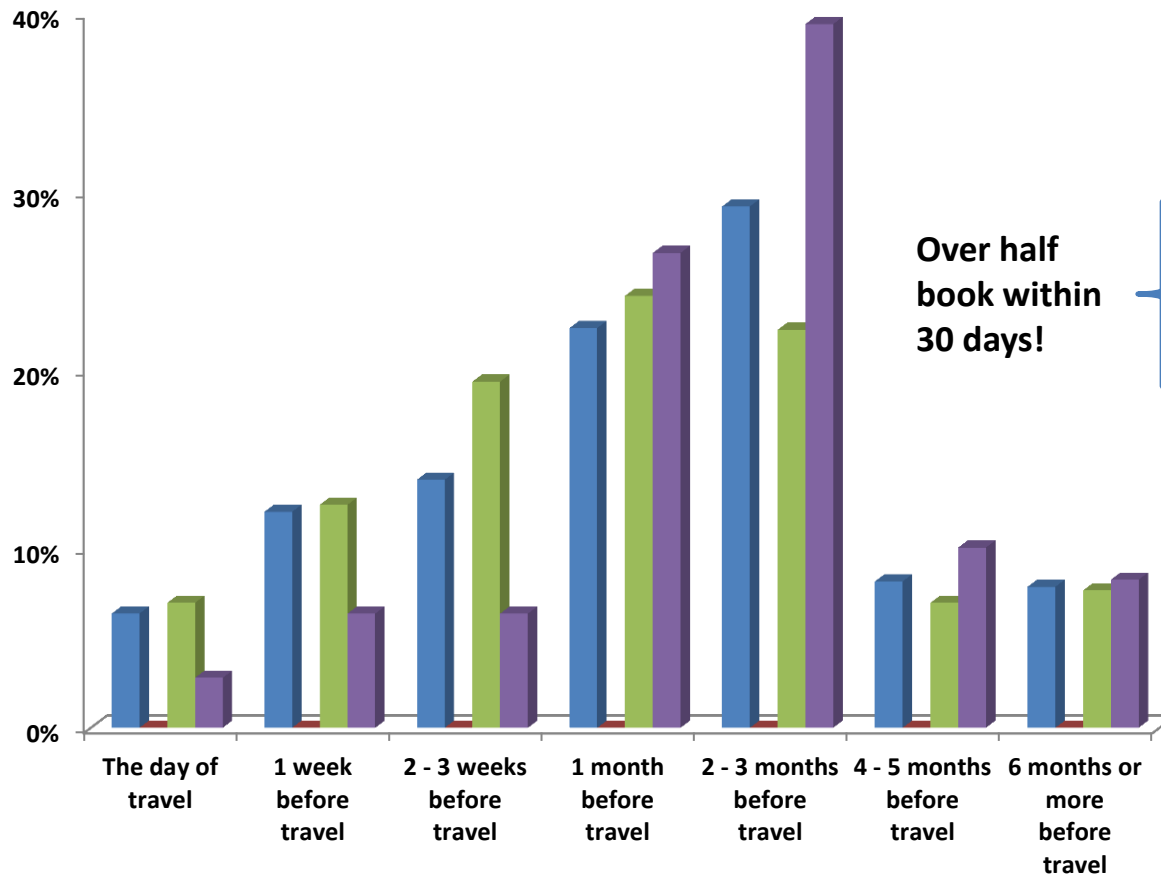
Regarding your LEISURE trip to Central New York, what was the SPECIFIC purpose for your trip?



Leisure Overnight	Domestic	International
Visiting friends and relatives	27.0%	7.5%
Other	14.9%	10.2%
General relaxation	13.8%	10.9%
Wineries / Breweries	7.9%	2.0%
Winter recreation	7.2%	1.7%
Festival / event / concert	4.5%	4.1%
Fishing	4.0%	0.7%
Overnight as part of longer trip - passing through	3.9%	8.8%
Wedding	3.7%	2.0%
Shopping	3.1%	43.9%
Outdoor recreation	3.0%	1.4%
Reunion	2.6%	1.0%
Historic sites	1.4%	1.0%
Sporting events	1.1%	1.7%
Museums	0.7%	0.3%
Casino / gaming activities	0.6%	0.7%
Dining	0.4%	1.4%
Relocation / retirement	0.2%	0.0%
Horse / Equine	0.1%	0.0%
Zoo	0.1%	0.7%

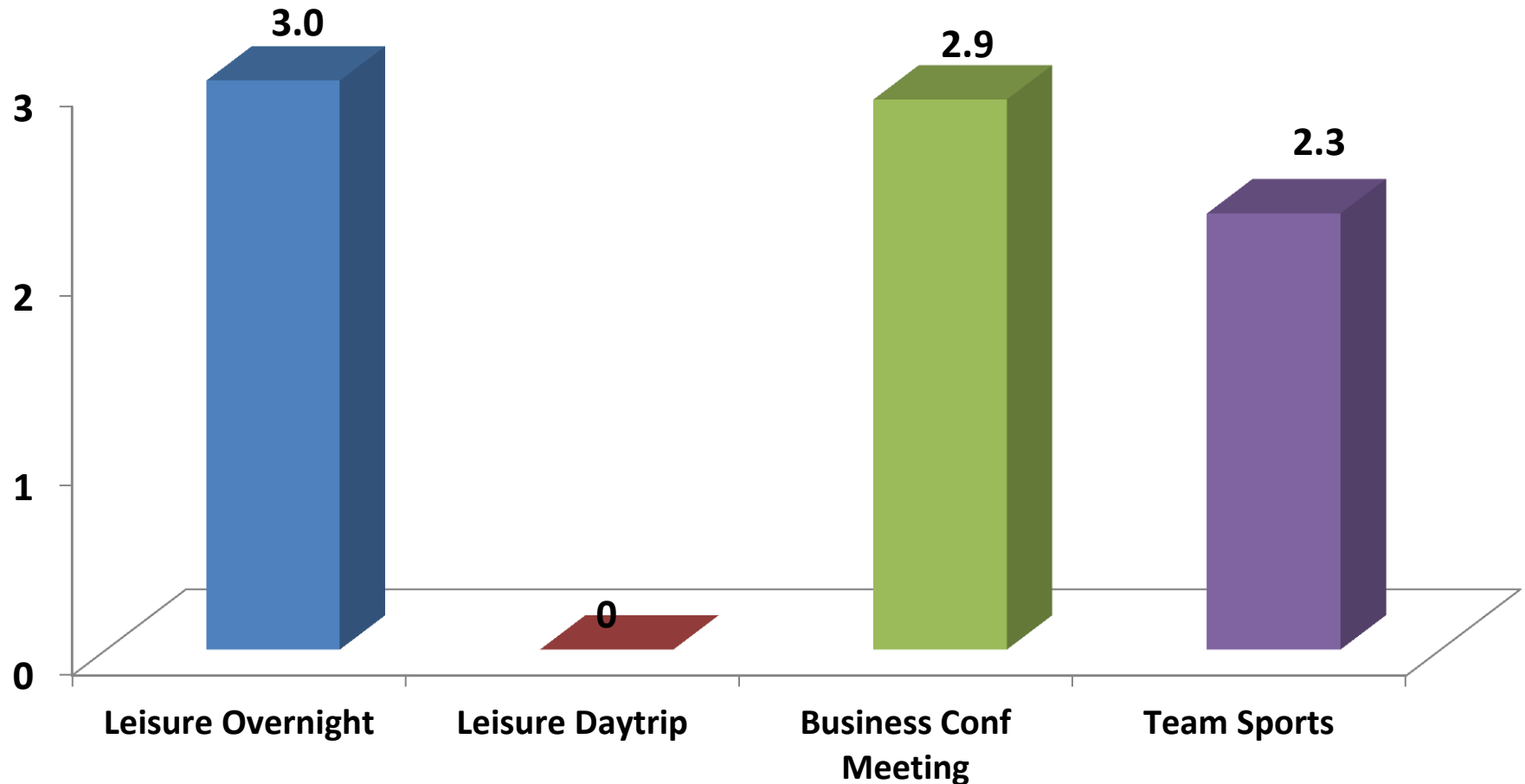
How far in advance did you book your accommodations for your most recent trip to Central New York?

■ Leisure Overnight ■ Leisure Daytrip ■ Business Conf Meeting ■ Team Sports

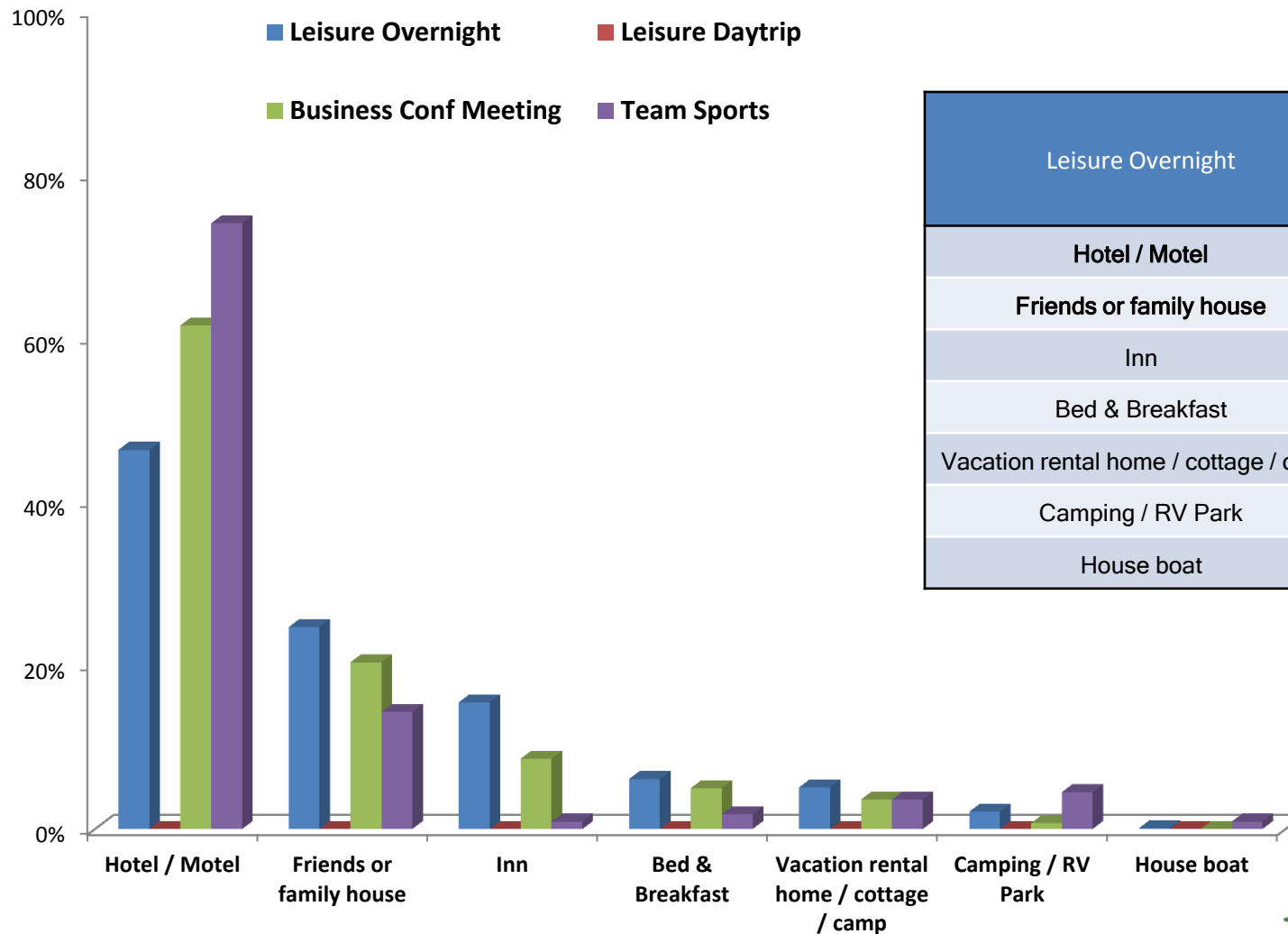


Leisure Overnight	Domestic	International
The day of travel	6.6%	5.6%
1 week before travel	11.2%	18.9%
2 - 3 weeks before travel	12.9%	20.7%
1 month before travel	22.9%	19.3%
2 - 3 months before travel	29.3%	25.6%
4 - 5 months before travel	8.8%	5.3%
6 months or more before travel	8.3%	4.6%

How many nights did you stay in Central New York on your most recent visit?



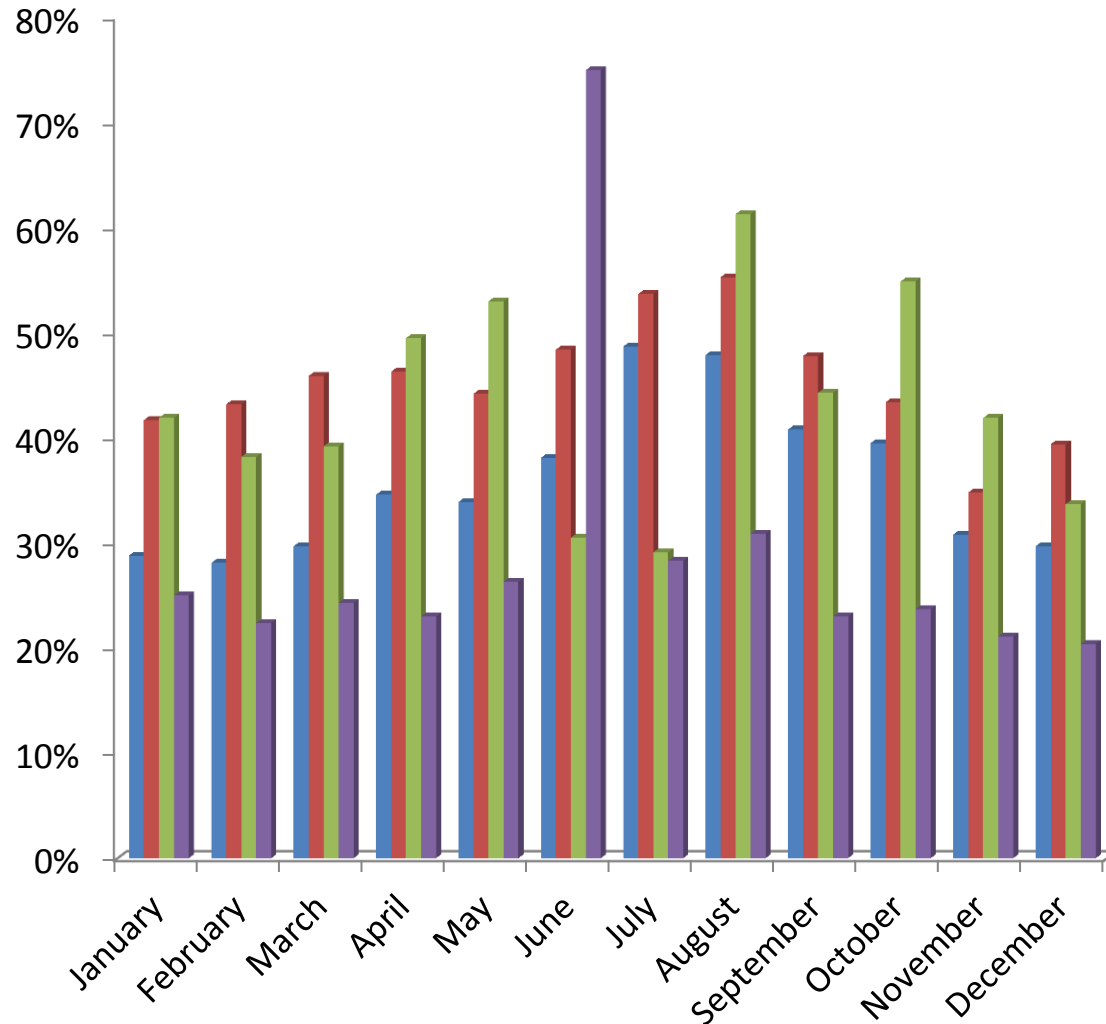
Where did you stay during your last visit to Central New York?



Leisure Overnight	Domestic	International
Hotel / Motel	41.6%	81.2%
Friends or family house	27.2%	7.2%
Inn	16.3%	8.2%
Bed & Breakfast	6.8%	1.4%
Vacation rental home / cottage / camp	5.7%	1.0%
Camping / RV Park	2.2%	1.0%
House boat	0.1%	0.0%

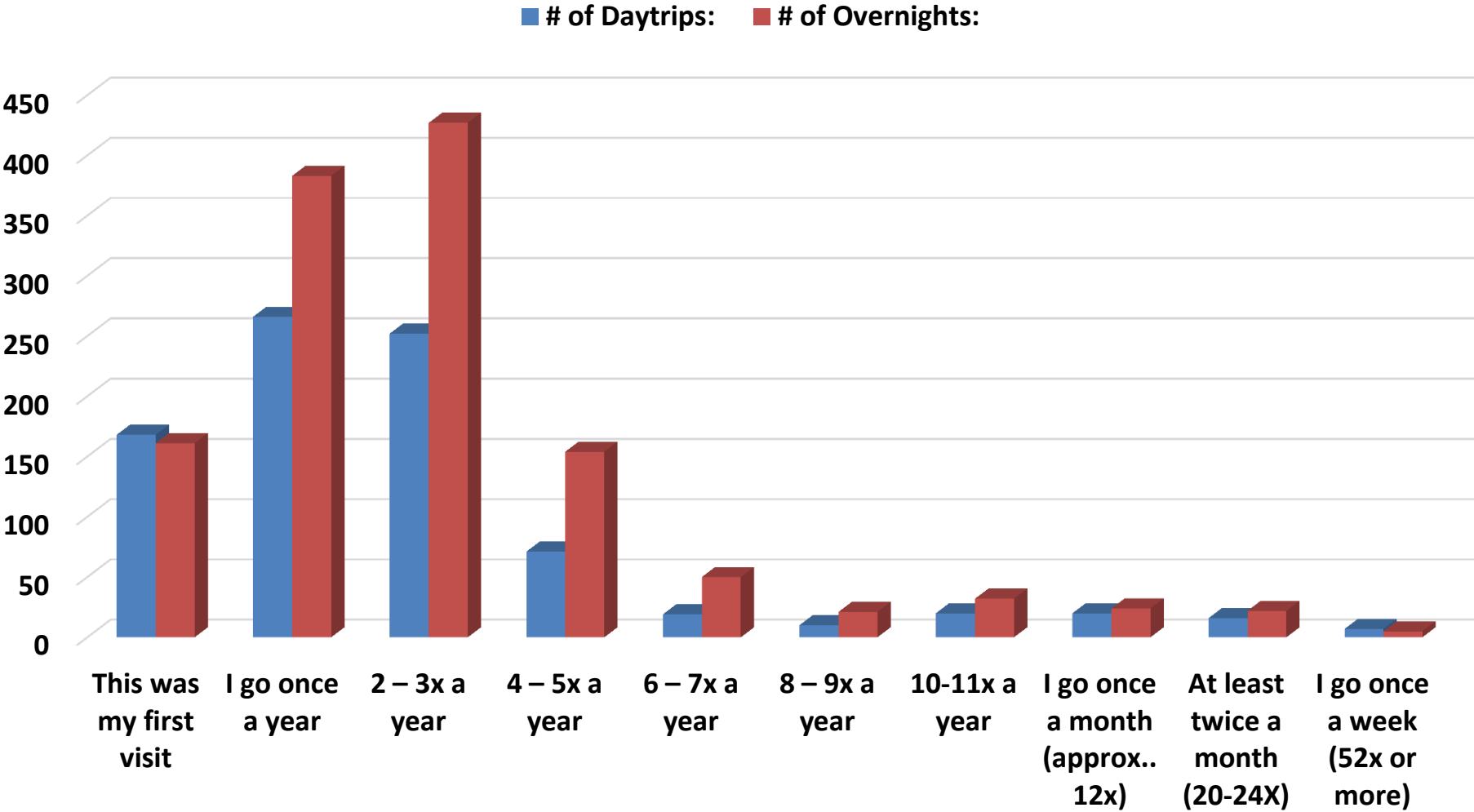
Check all the months in which you have visited Central New York.

■ Leisure Overnight ■ Leisure Daytrip ■ Business Conf Meeting ■ Team Sports

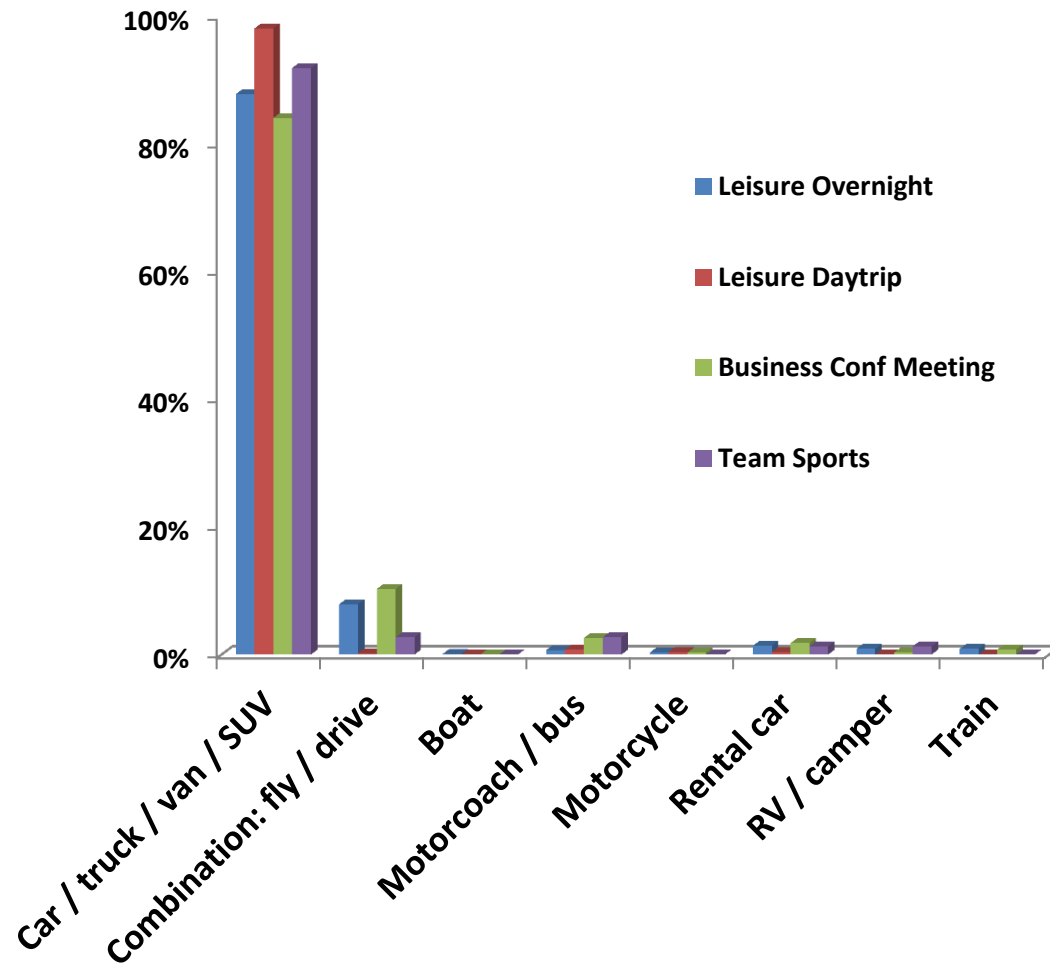


Leisure Overnight	Domestic	International
January	30.3%	18.7%
February	30.0%	16.7%
March	30.2%	24.5%
April	35.3%	29.9%
May	34.6%	34.7%
June	39.3%	31.3%
July	48.9%	46.3%
August	48.7%	41.8%
September	42.1%	32.0%
October	40.8%	29.6%
November	29.6%	35.4%
December	30.6%	23.1%

Annually, how many times do you typically visit Central New York?

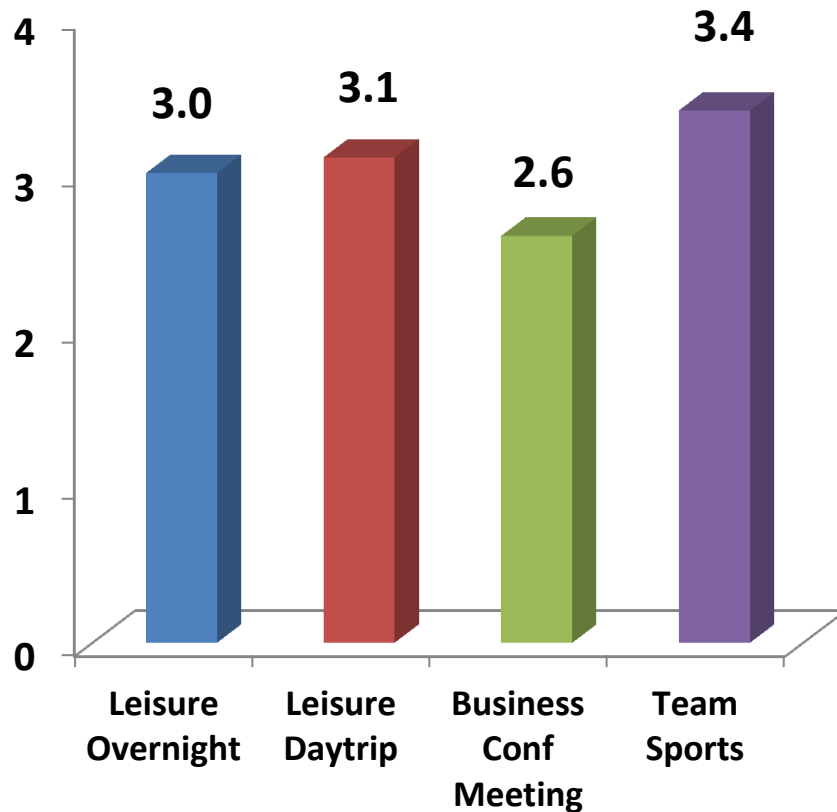


What PRIMARY mode of transportation did you use TO GET TO Central New York?

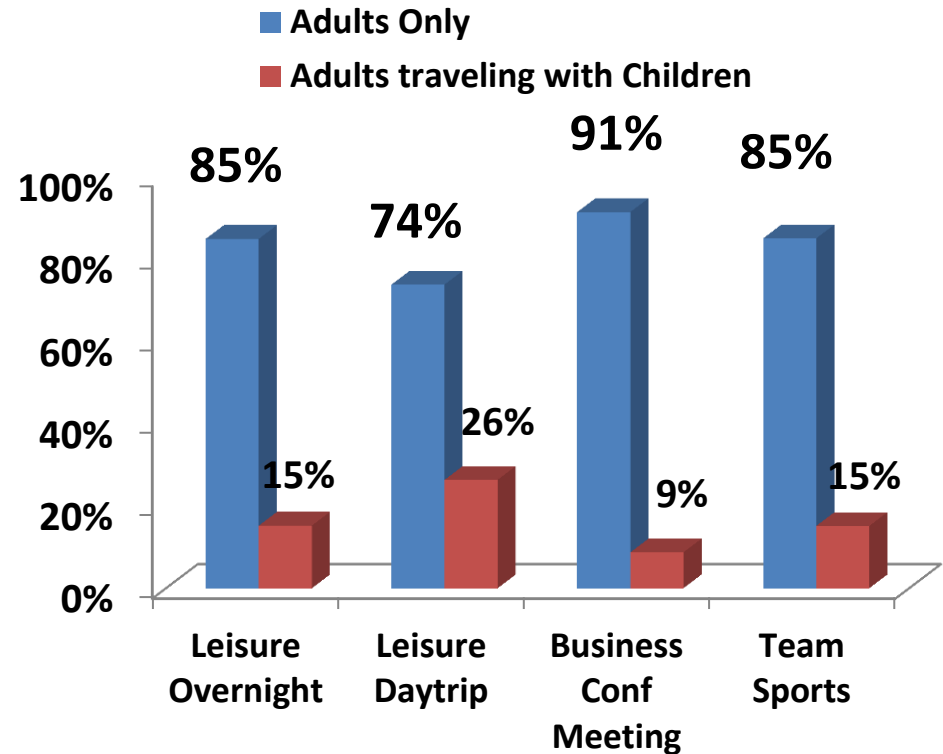


Leisure Overnight	Domestic	International
Car / truck / van / SUV	86.9%	94.5%
Combination: fly / drive	8.6%	2.8%
Rental car	1.3%	1.4%
Train	1.1%	0.0%
RV / camper	0.9%	0.7%
Motorcoach / bus	0.8%	0.3%
Motorcycle	0.3%	0.3%
Boat	0.1%	0.0%

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



Was your travel party compromised of adults only or adults traveling with children?



Top 5 activities LEISURE OVERNIGHT Domestic visitors reported participating in

1. Dining - Fine or local culinary - 67%
2. Shopping - 50%
3. Driving / sightseeing - 49%
4. Visited friends & relatives - 35%
5. Wineries - 30%

Top 5 activities LEISURE OVERNIGHT International visitors reported participating in

1. Shopping - 85%
2. Dining - Fine or local culinary - 53%
3. Driving / sightseeing - 33%
4. Sleep late / take a nap - 22%
5. Visiting friends & relatives - 16%

Top 5 activities LEISURE DAYTRIP visitors reported participating in

1. Shopping – 60%
2. Dining – 51%
3. Driving/Sightseeing – 31%
4. Visited friends and relatives – 16%
5. Wineries – 16%

Top 5 activities Team Sports visitors reported participating in

1. Sports Event– 63%
2. Dining – 51%
3. Shopping – 32%
4. College/University – 22%
5. Driving/Sightseeing – 21%

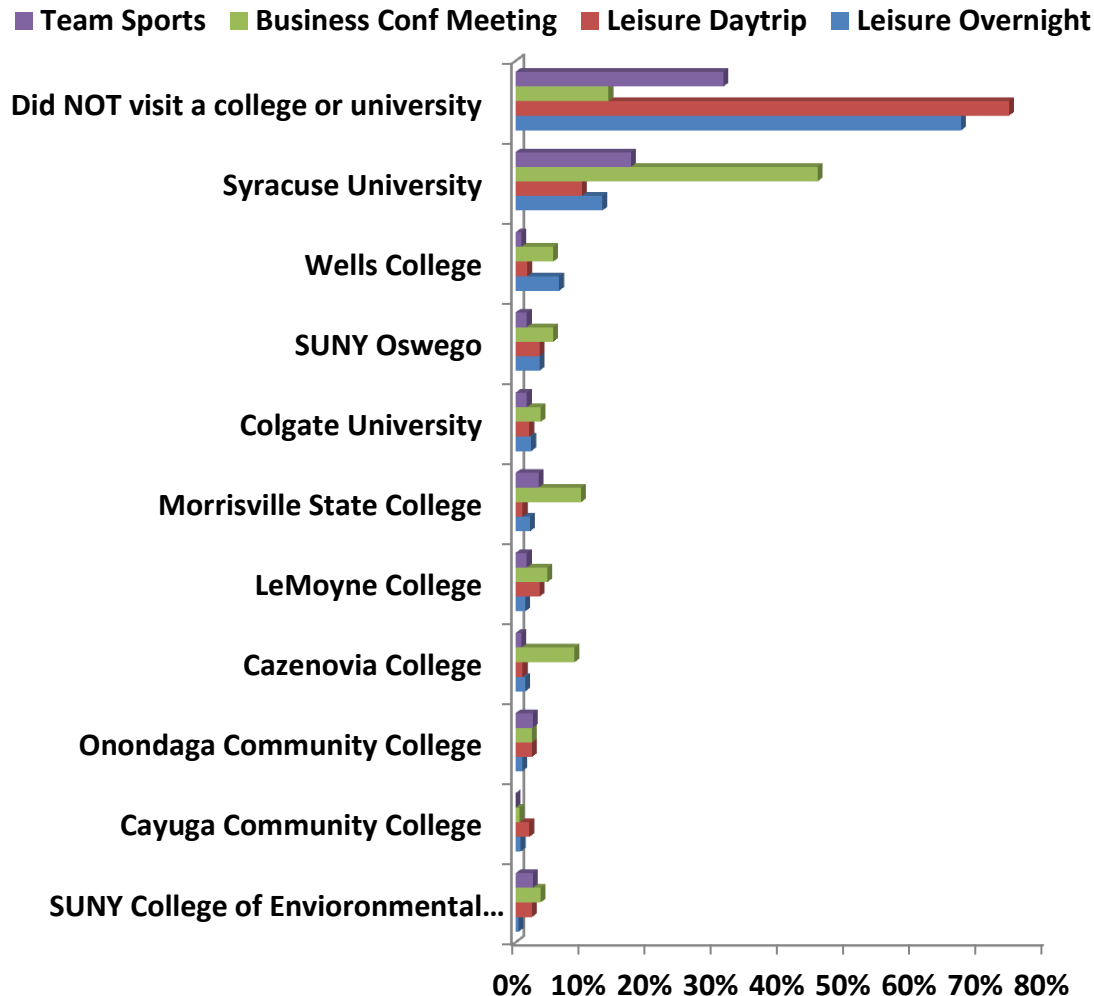
Top 5 activities Bus/Conf/Mtg visitors reported participating in

1. College/University– 65%
2. Dining – 55%
3. Shopping – 49%
4. Driving/Sightseeing – 31%
5. Visited friends and relatives – 19%

All OUTDOOR activities respondents reported participating in:

Response Category	Leisure Overnight Domestic	Leisure Overnight International	Leisure Daytrip	Business Conf Meeting	Team Sports
Did NOT participate in outdoor activities	50.1%	80.5%	65.5%	68.4%	58.1%
Hiking	21.8%	9.2%	11.4%	16.9%	11.6%
Other	9.5%	1.5%	5.3%	3.9%	24.8%
Boating	9.5%	5.5%	6.6%	2.7%	2.3%
Downhill skiing/snowboarding	7.5%	2.6%	10.7%	4.8%	3.1%
Fishing - other	6.7%	0.4%	5.6%	4.2%	1.6%
Bird/wildlife viewing	6.6%	1.1%	5.1%	2.7%	3.1%
Biking	5.5%	1.5%	4.4%	3.6%	4.7%
Salmon River fishing	4.6%	1.1%	2.7%	2.1%	0.0%
Lake Ontario fishing	3.2%	0.4%	3.2%	0.6%	0.8%
Snowmobiling	2.9%	0.4%	2.7%	2.1%	0.0%
Hunting	1.6%	0.0%	1.5%	0.6%	0.8%
Cross country skiing	1.5%	0.7%	1.2%	2.1%	1.6%
Snow-shoeing	1.2%	0.7%	1.2%	1.2%	0.8%
Ice Skating	1.1%	0.4%	1.7%	2.4%	0.0%
Horseback riding	0.8%	0.4%	0.5%	2.4%	1.6%
Balloon rides	0.6%	0.4%	0.2%	0.6%	1.6%
Scuba diving	0.5%	0.0%	0.0%	0.0%	0.0%
Ice fishing	0.3%	0.0%	0.2%	1.5%	0.0%

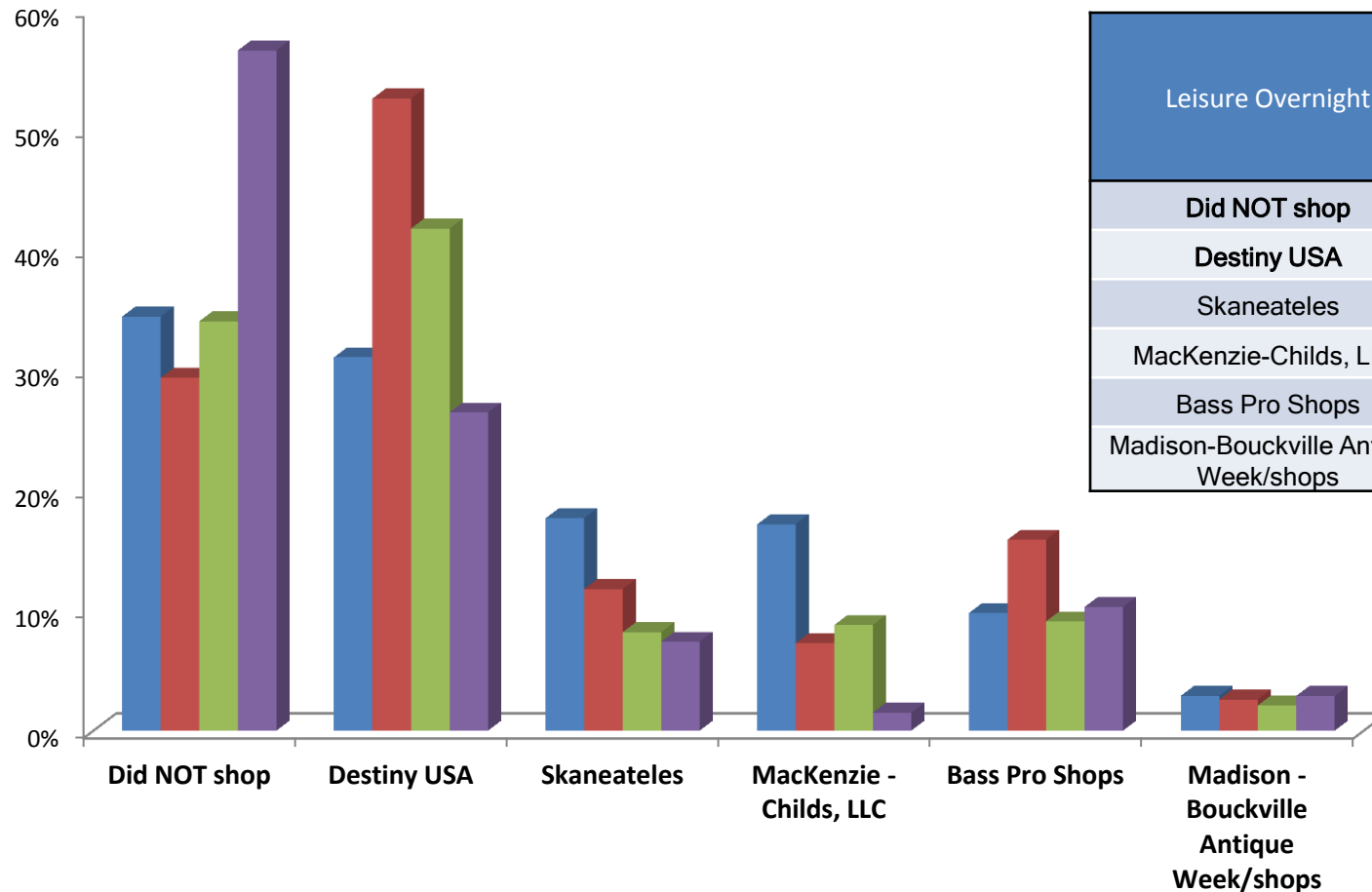
Did you visit a college or university? If so, please tell us which one.



Leisure Overnight	Domestic	International
Did NOT visit a college or university	65.5%	79.8%
Syracuse University	13.5%	10.4%
Other (please specify)	9.6%	5.8%
Wells College	7.0%	2.9%
SUNY Oswego	4.0%	0.6%
Colgate University	2.7%	0.6%
Morrisville State College	2.4%	0.6%
Cazenovia College	1.7%	0.0%
LeMoyne College	1.7%	0.6%
Onondaga Community College	1.1%	0.0%
Cayuga Community College	0.9%	0.0%
SUNY College of Environmental Science and Forestry	0.6%	0.0%

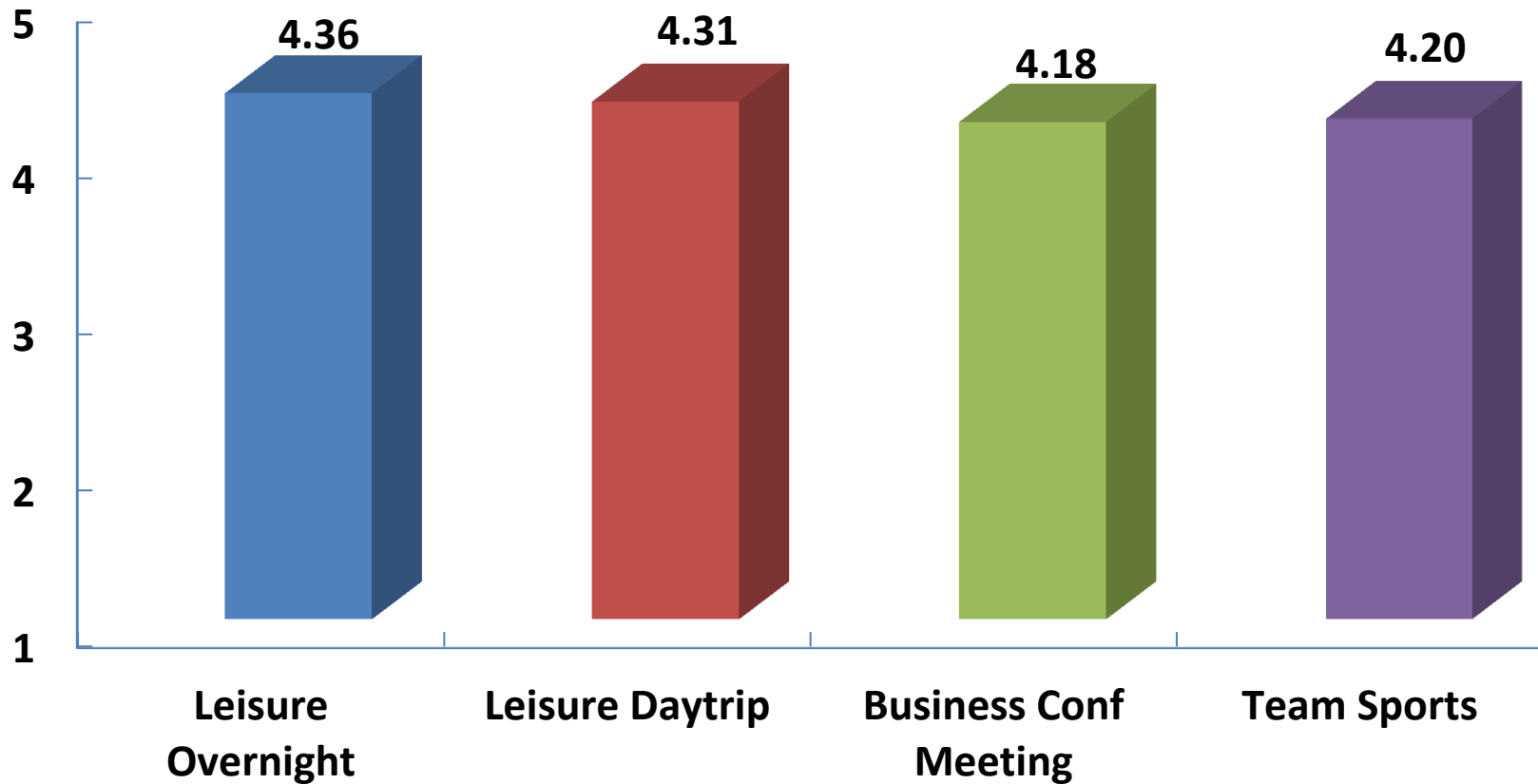
Did you SHOP at any of these major shopping areas while in Central New York?

■ Leisure Overnight ■ Leisure Daytrip ■ Business Conf Meeting ■ Team Sports



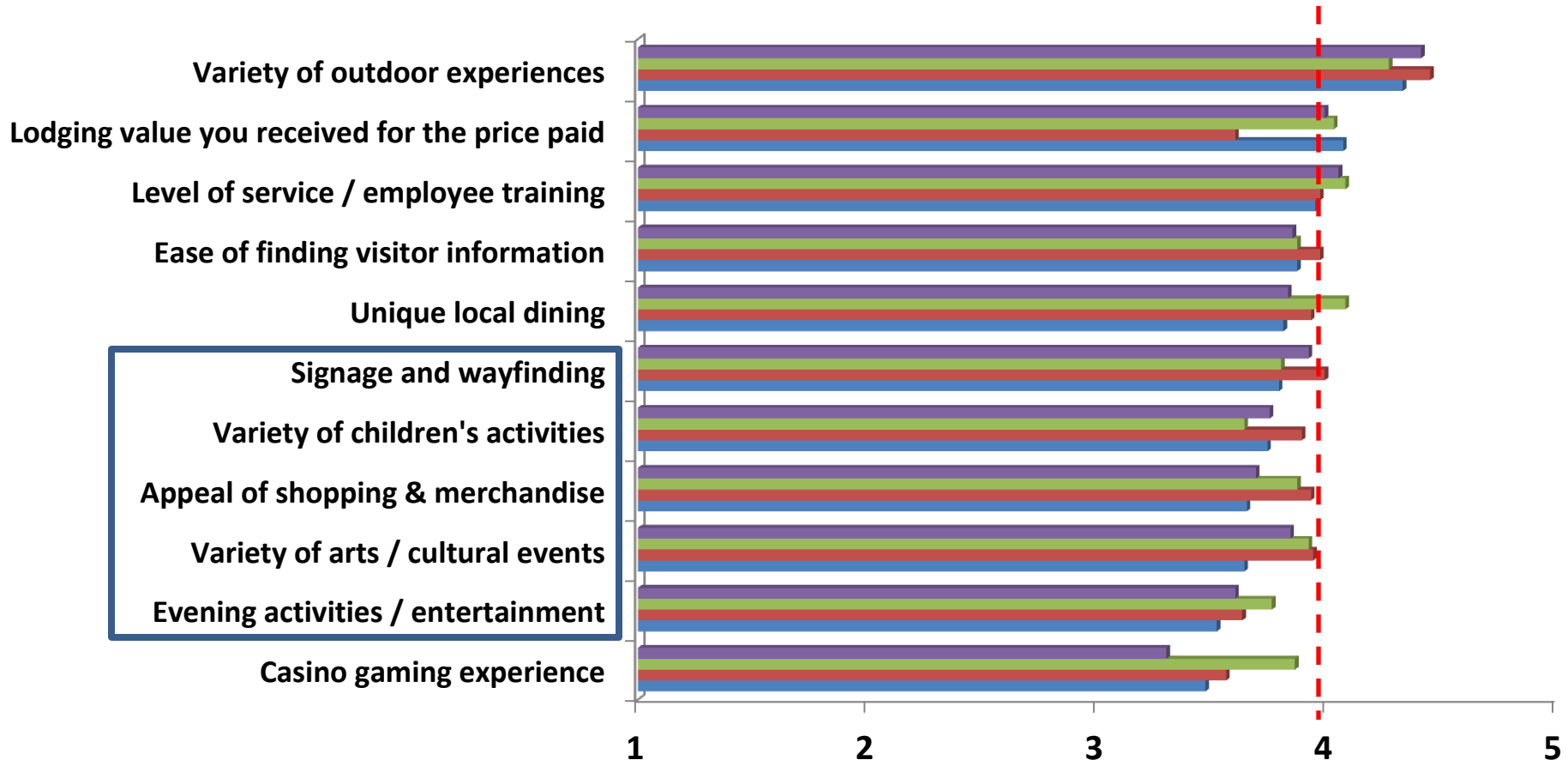
Leisure Overnight	Domestic	International
Did NOT shop	37.6%	13.4%
Destiny USA	25.1%	71.7%
Skaneateles	19.5%	5.1%
MacKenzie-Childs, LLC	19.1%	4.3%
Bass Pro Shops	10.0%	9.1%
Madison-Bouckville Antique Week/shops	3.2%	1.1%

Central New York Overall Visit Satisfaction



Please rate each of the following amenities on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent).

■ Team Sports ■ Business Conf Meeting ■ Leisure Daytrip ■ Leisure Overnight



Top 21 communities respondents reported visiting while in Central NY:

- | | |
|--------------------------------|---------------------------|
| 1. Syracuse – 59.7% | 12. Dewitt – 14.0% |
| 2. Cortland (Greek Peak) – 37% | 13. Aurora – 13.9% |
| 3. East Syracuse – 26.6 | 14. Utica – 13.3% |
| 4. North Syracuse – 21.7% | 15. Cayuga – 13.0% |
| 5. Skaneateles – 20.2% | 16. Cazenovia – 12.2% |
| 6. Auburn – 19.8% | 17. Oneida – 11.2% |
| 7. Corning – 19.0% | 18. Cicero – 10.4% |
| 8. Canandaigua – 16.9% | 19. Baldwinsville – 10.3% |
| 9. Liverpool – 16.2% | 20. Pulaski – 7.5% |
| 10. Oswego – 15.1% | 21. Clay – 6.7% |
| 11. Alexandria Bay – 14.3% | |

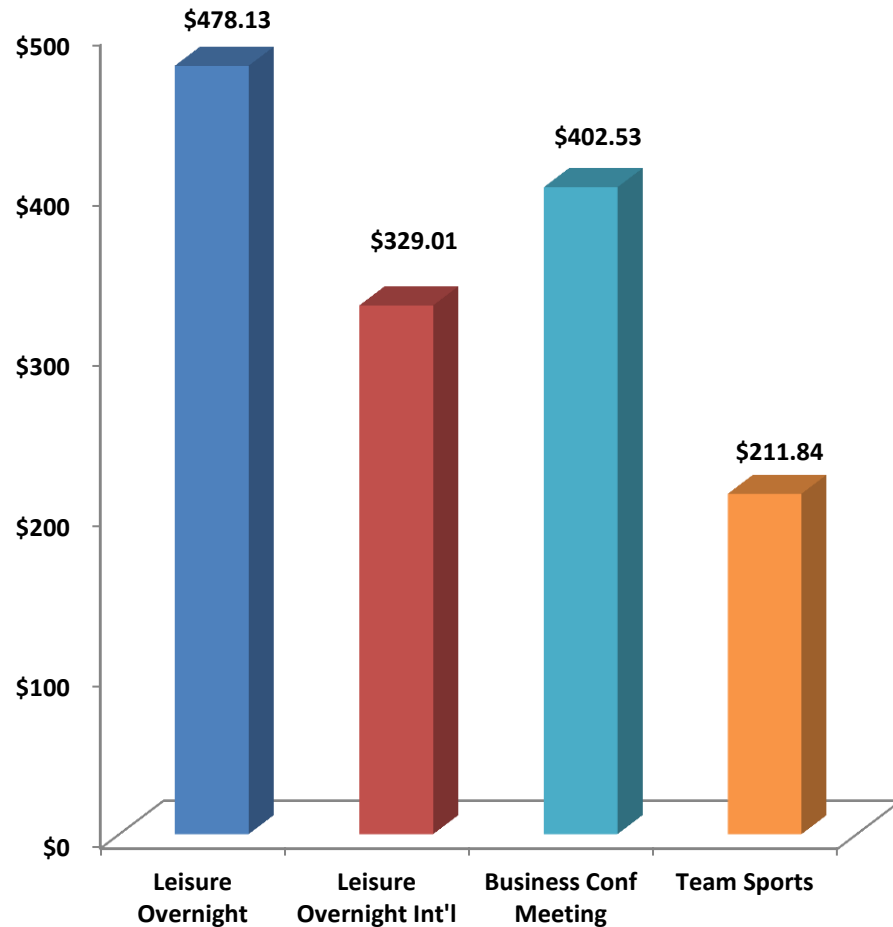
What words would you use to describe Central New York?



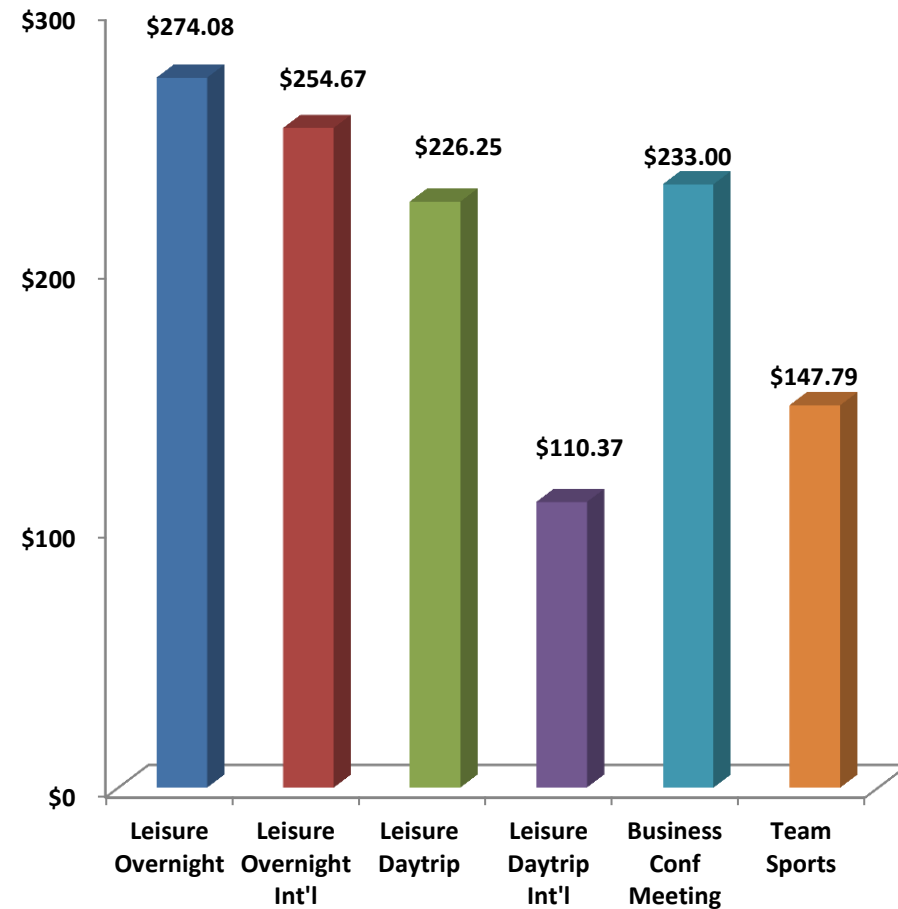


Central New York Visitor Spending Data

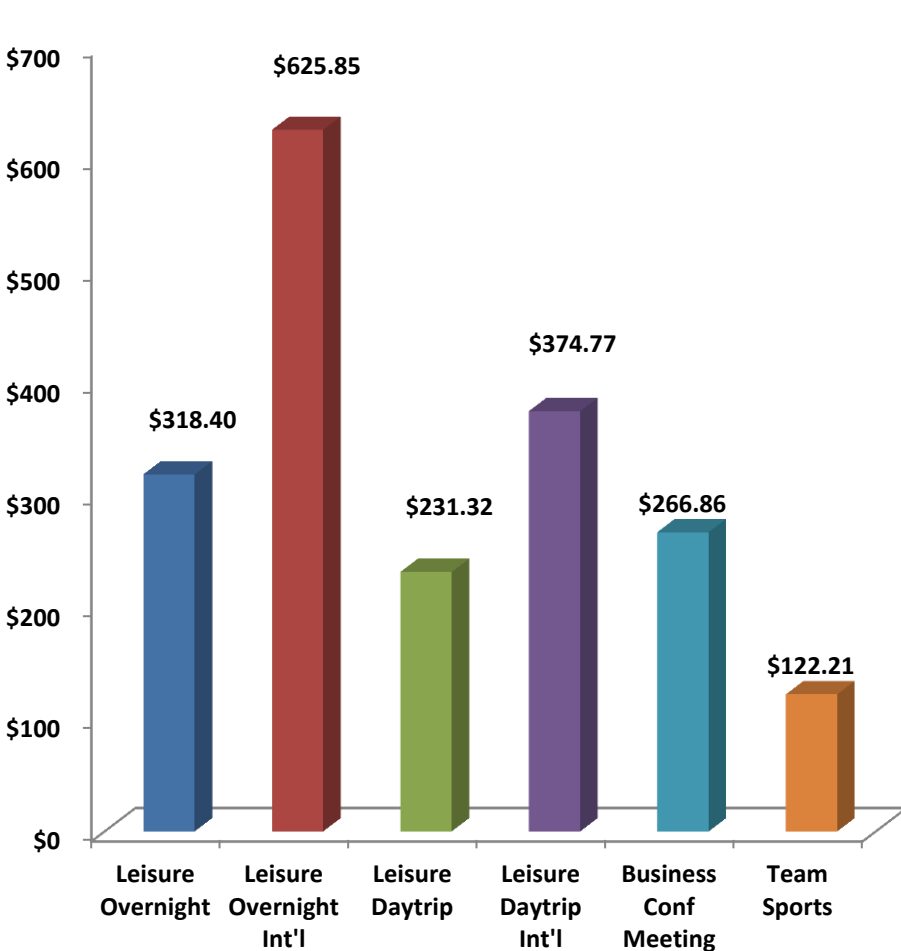
Lodging – (65%)



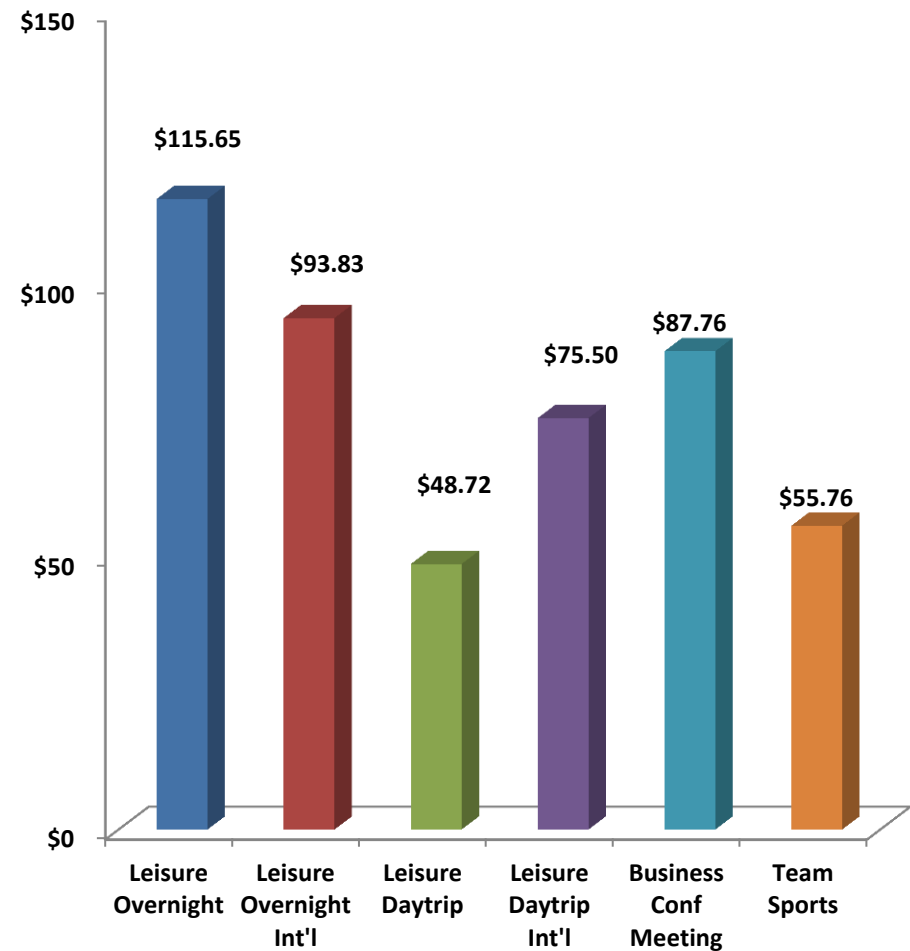
Food/Meals – (82%)



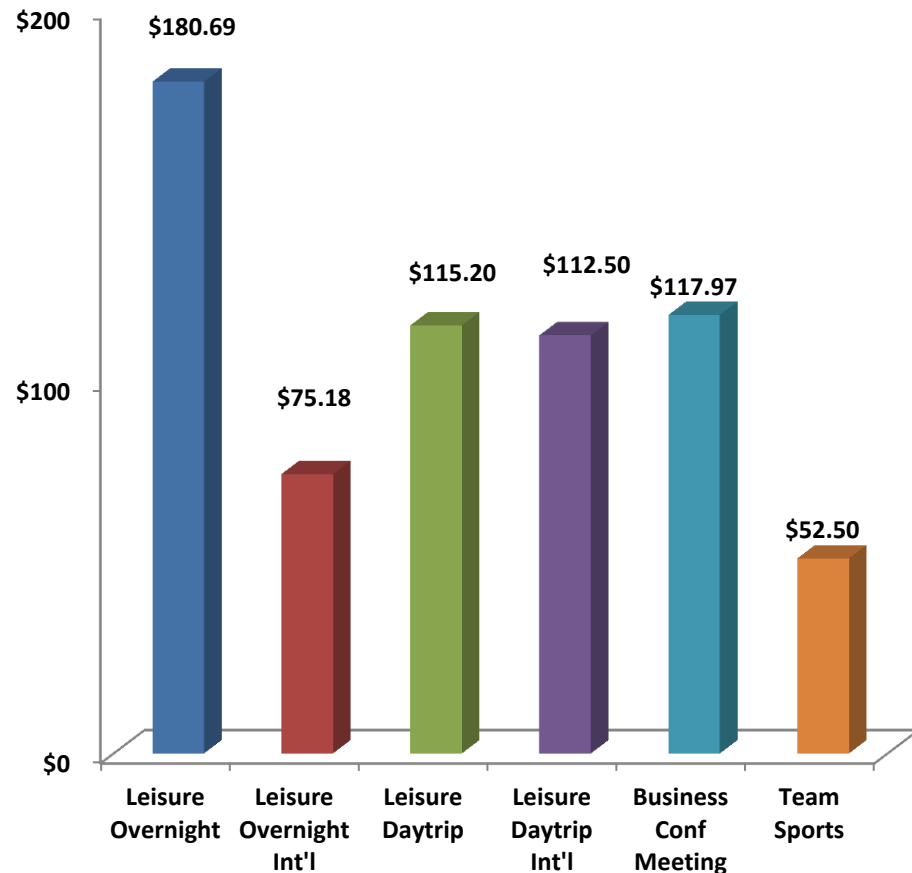
Shopping – (59%)



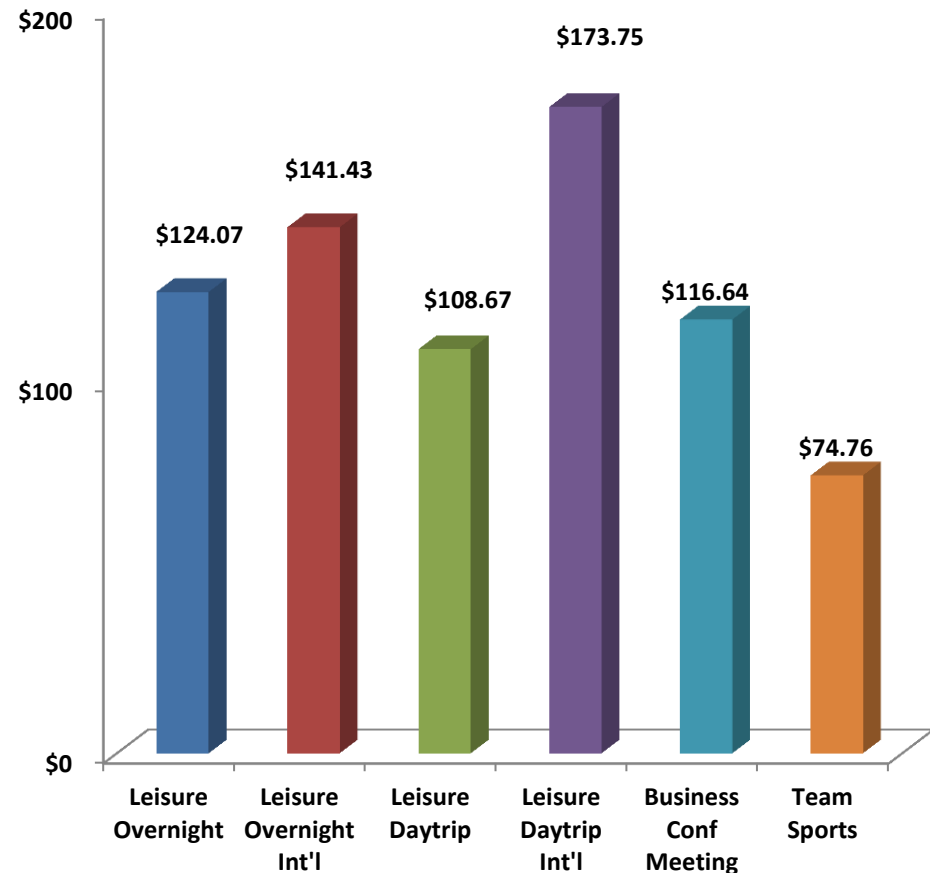
Local Transportation – (32%)



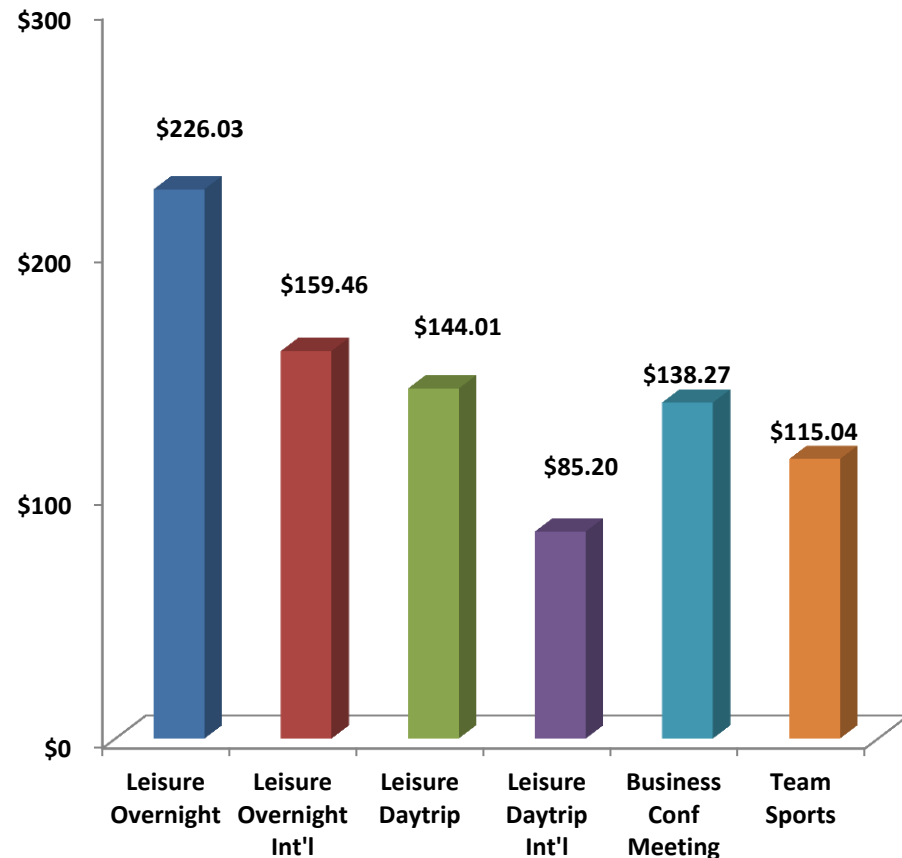
Wineries / Breweries / Distilleries – (29%)



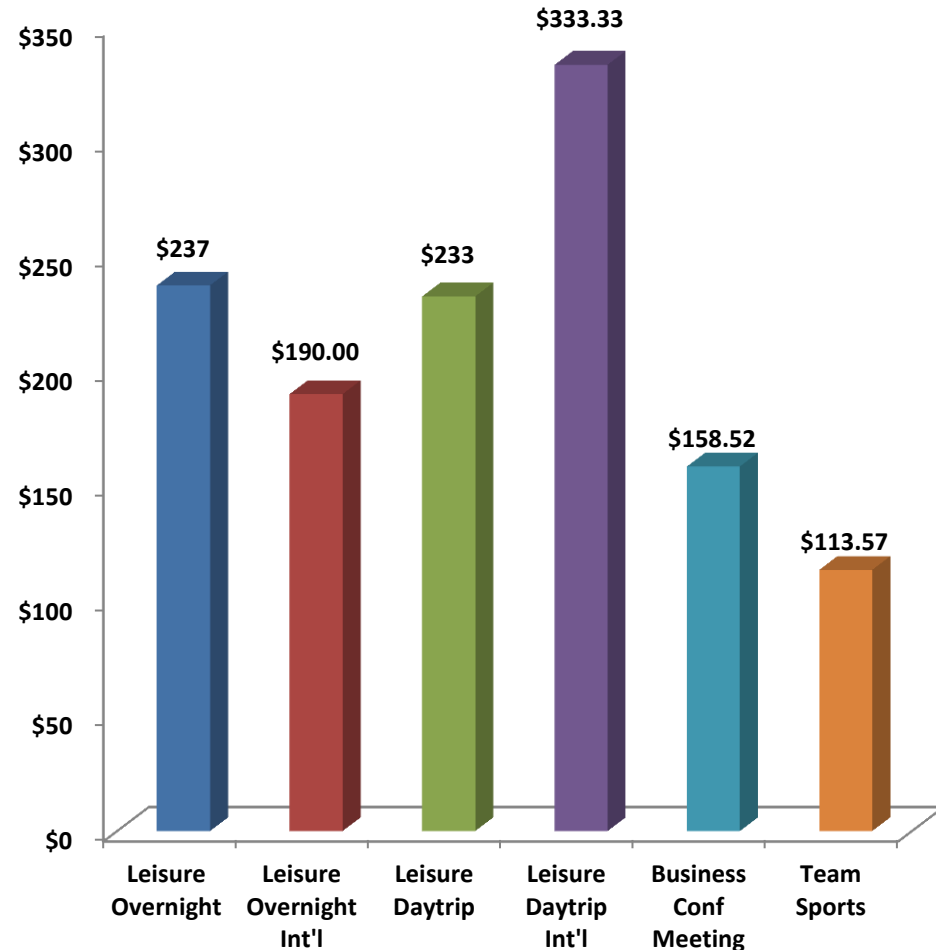
Attractions / Events (non-gaming) – (28%)



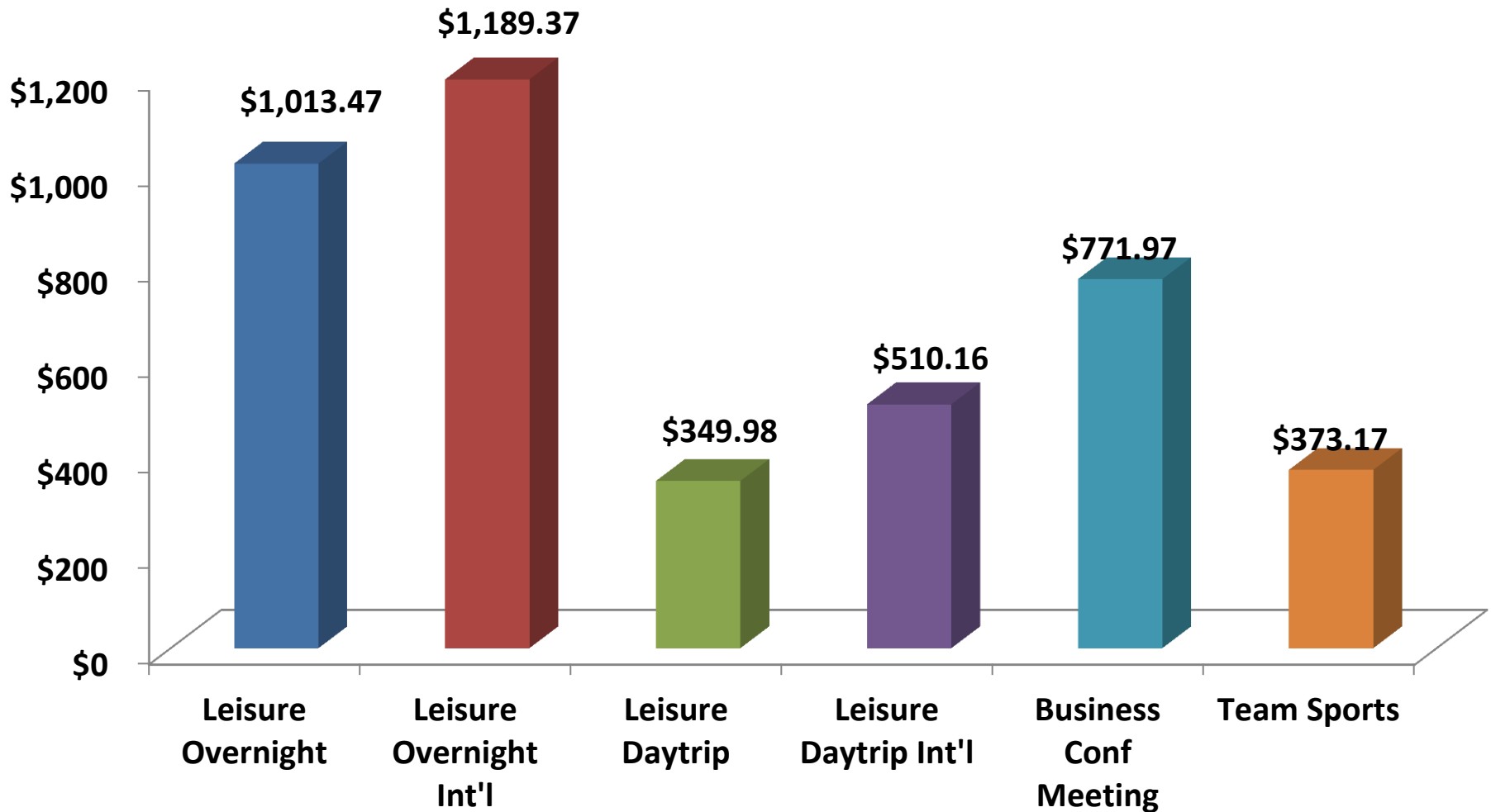
Recreational Activities (Sports/ Spas) – (27%)



Casino / Gaming Activities – (5%)



Total Party Spending



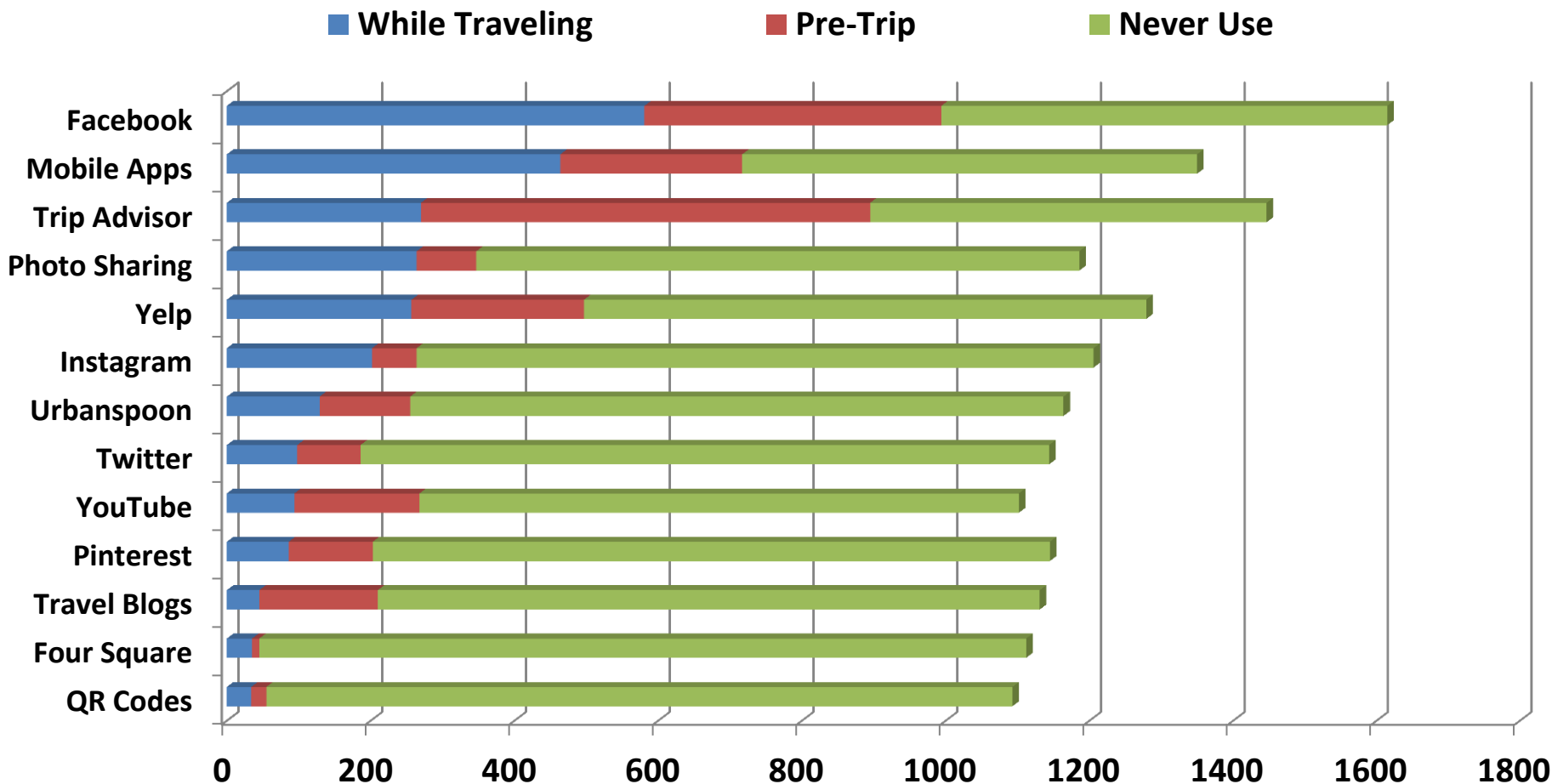


Central New York Visitor Profile

Leisure Overnight n=1,711

Central New York Visitor Profile – Leisure Overnight

How did you use the following social media sites or applications as part of your travel to Central New York?



Point of Origin – Leisure Overnight



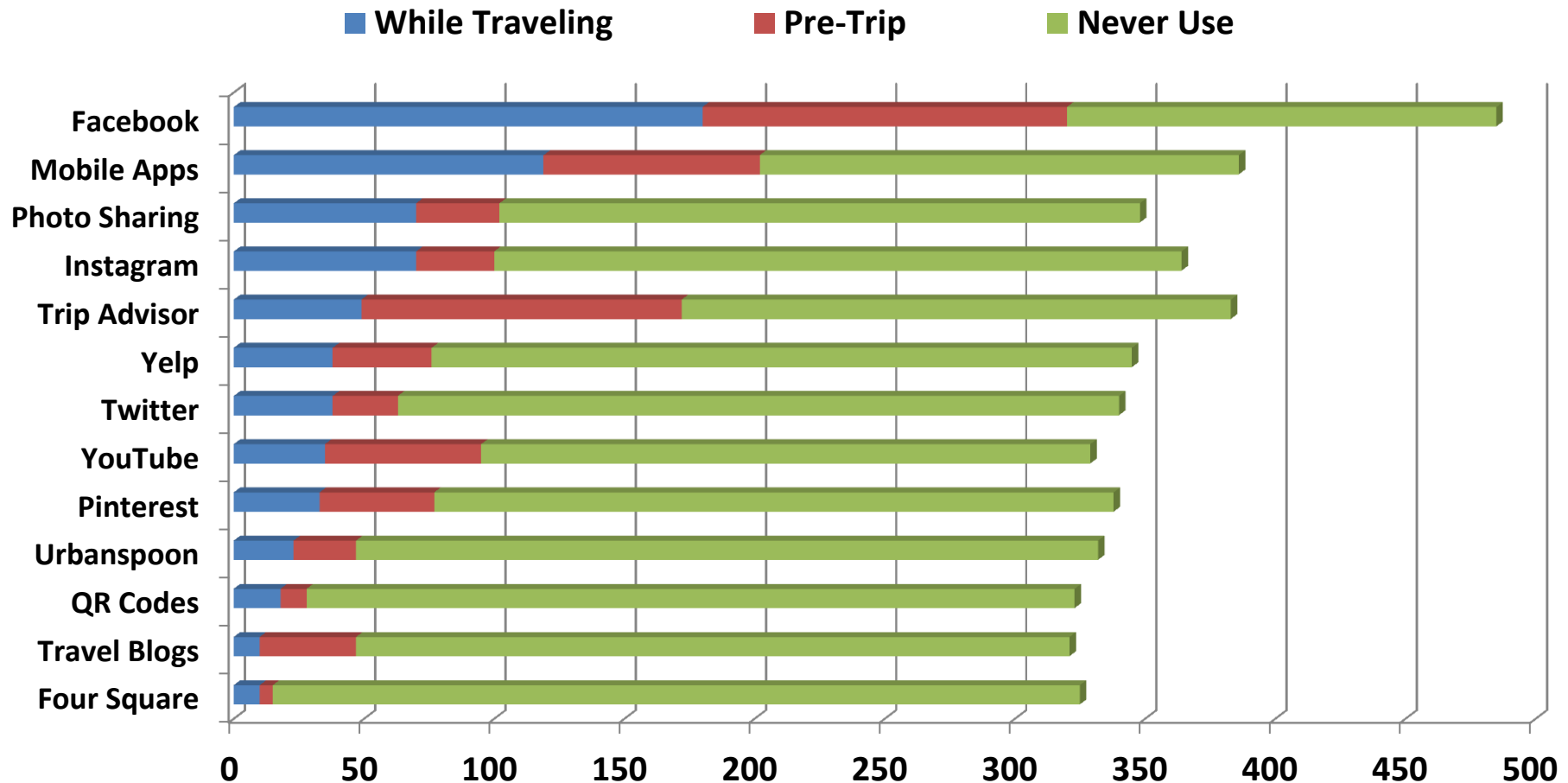


Central New York Visitor Profile

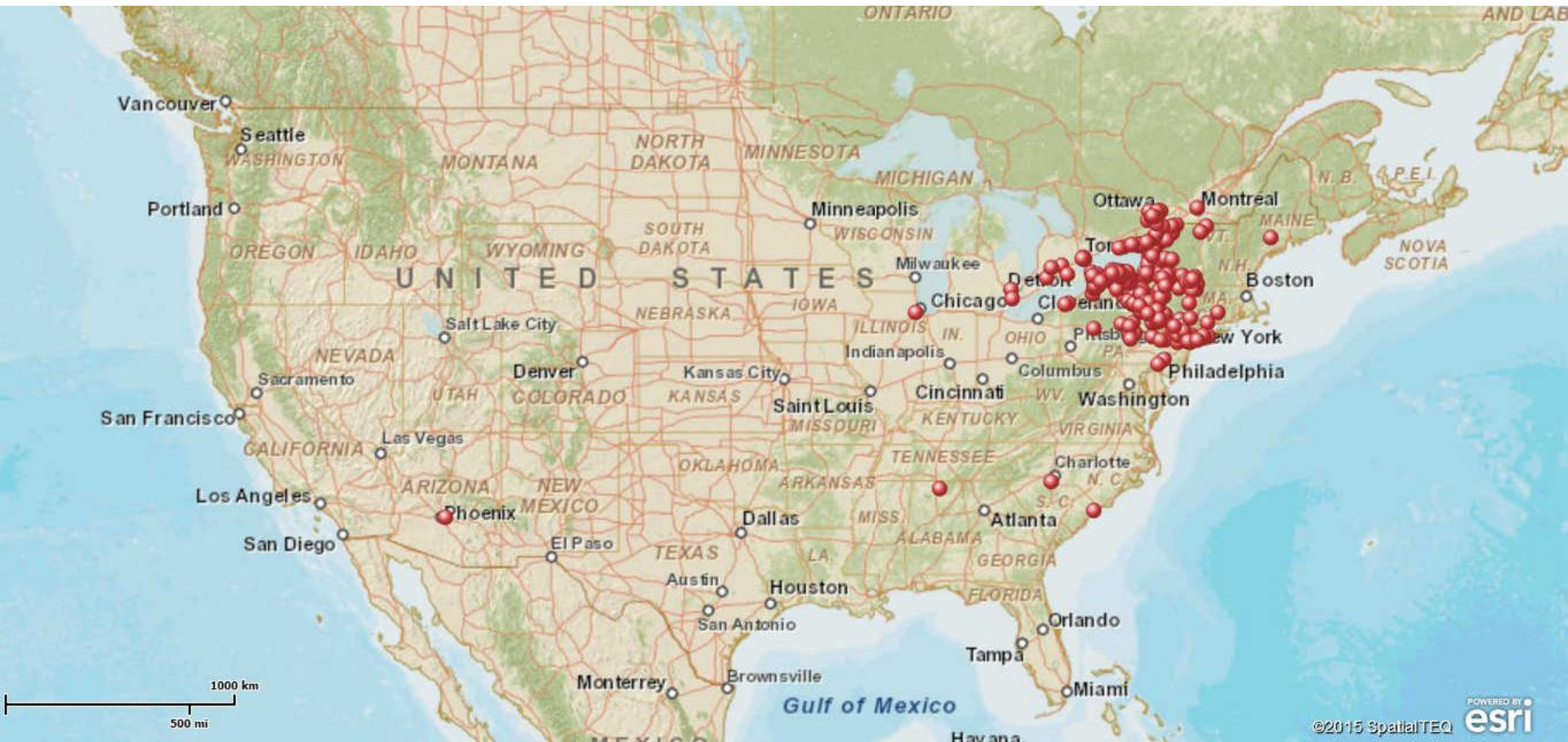
Leisure Daytrip n=505

Central New York Visitor Profile – Leisure Daytrip

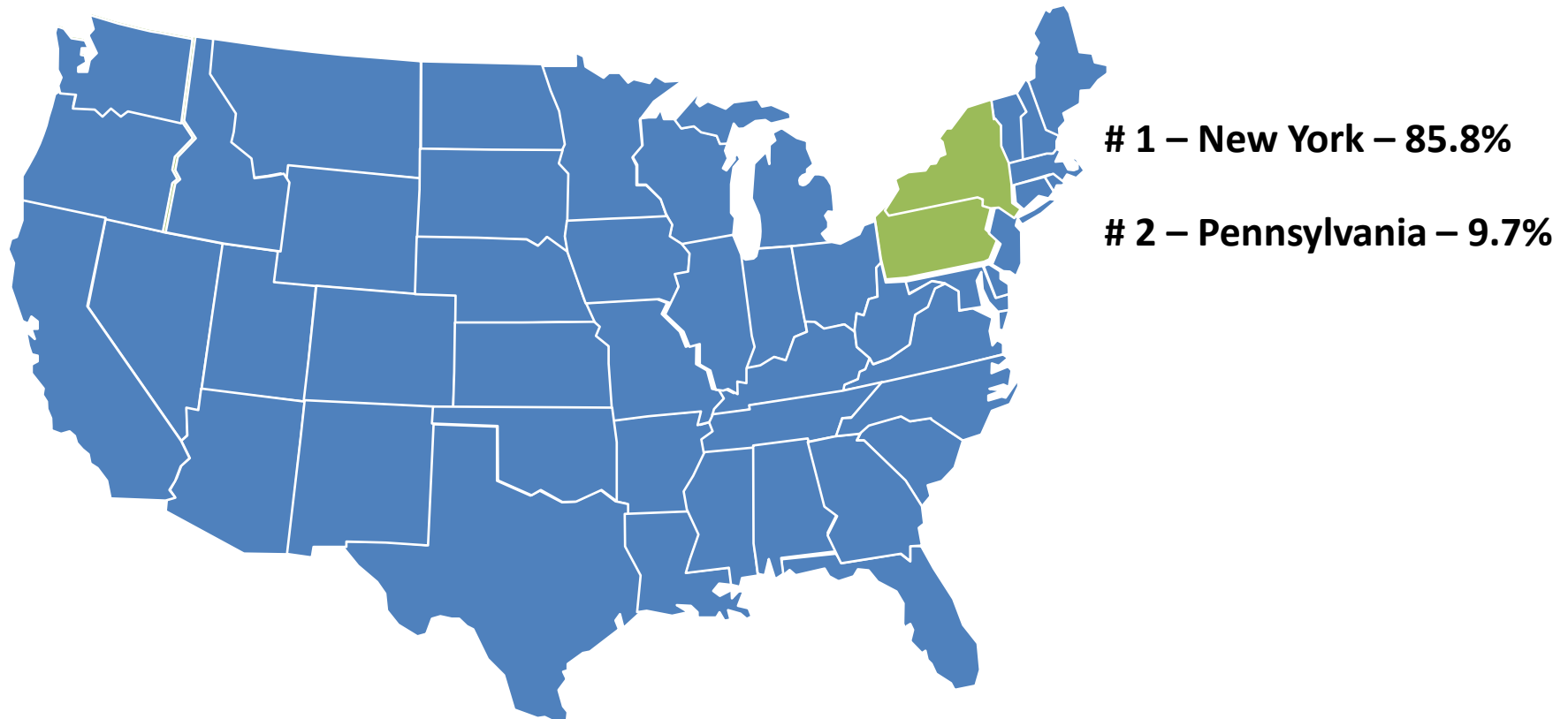
How did you use the following social media sites or applications as part of your travel to Central New York?



Point of Origin – Leisure Daytrippers



Top 5 Points of Origin – Leisure Daytrip

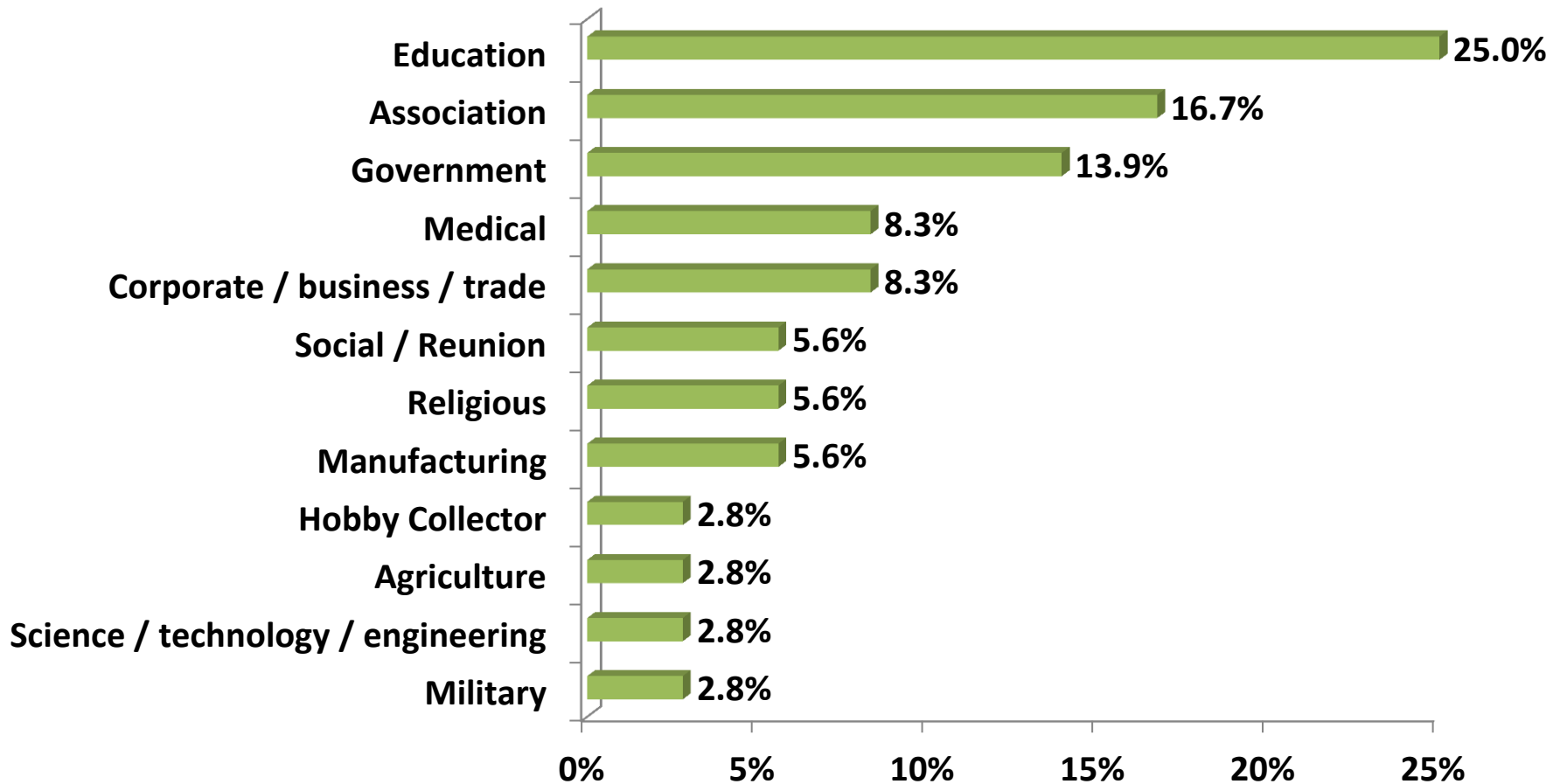




Central New York Visitor Profile

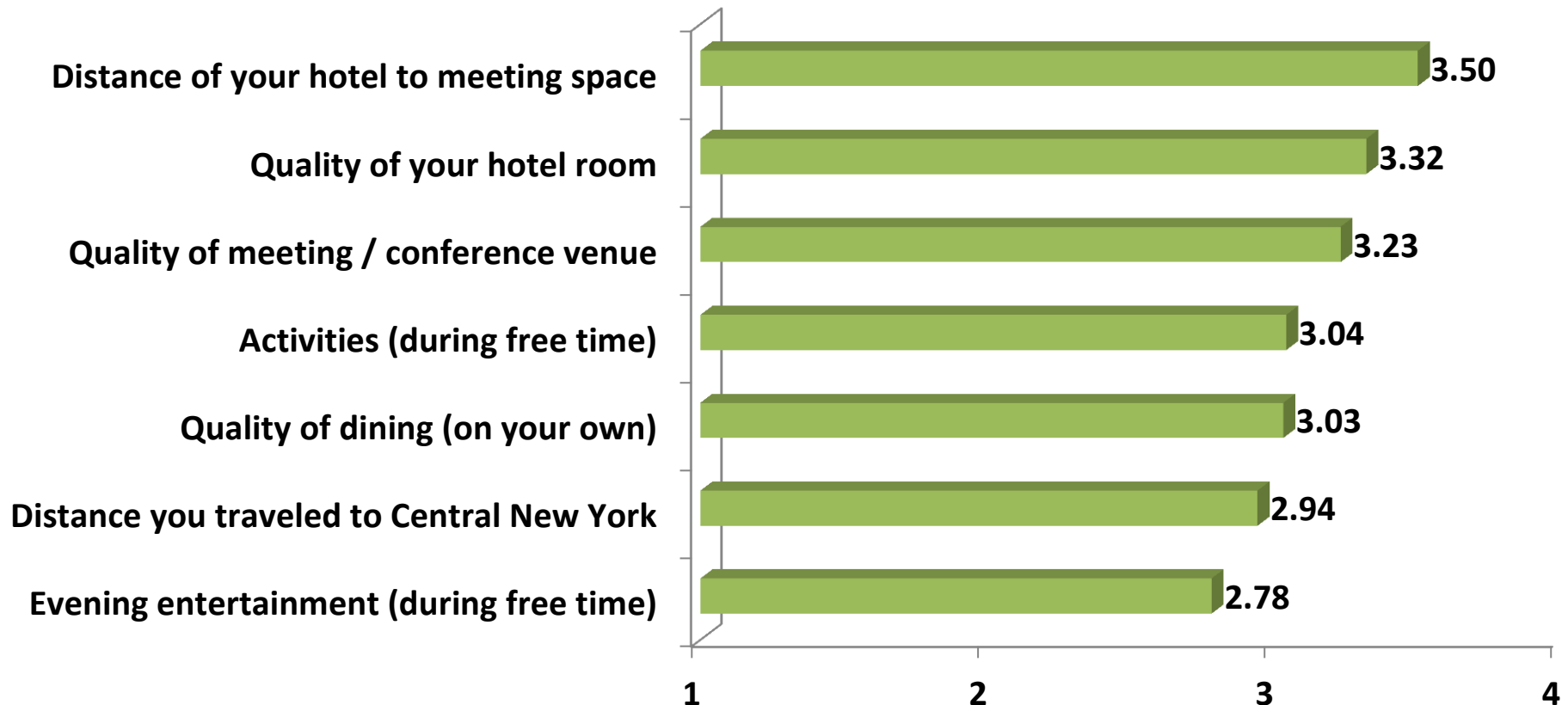
Business/Conf/Mtg/University n=406

Please describe the market segment of the conference/meeting you attended.

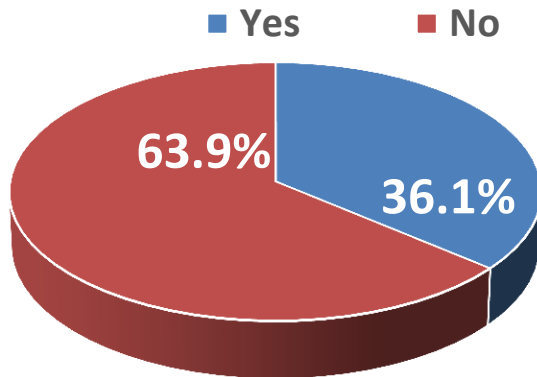


Please rate Central New York as a conference/meeting destination in the following categories:

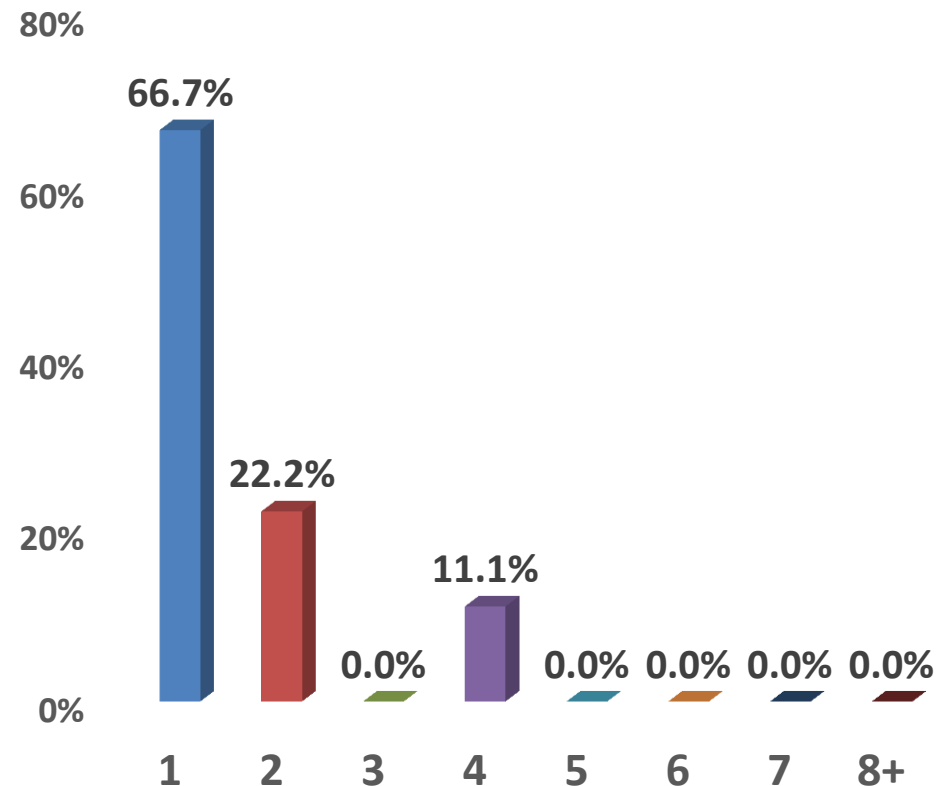
Use a 4-point scale where 1=Very dissatisfied, 2=Somewhat dissatisfied, 3=Satisfied and 4=Very satisfied



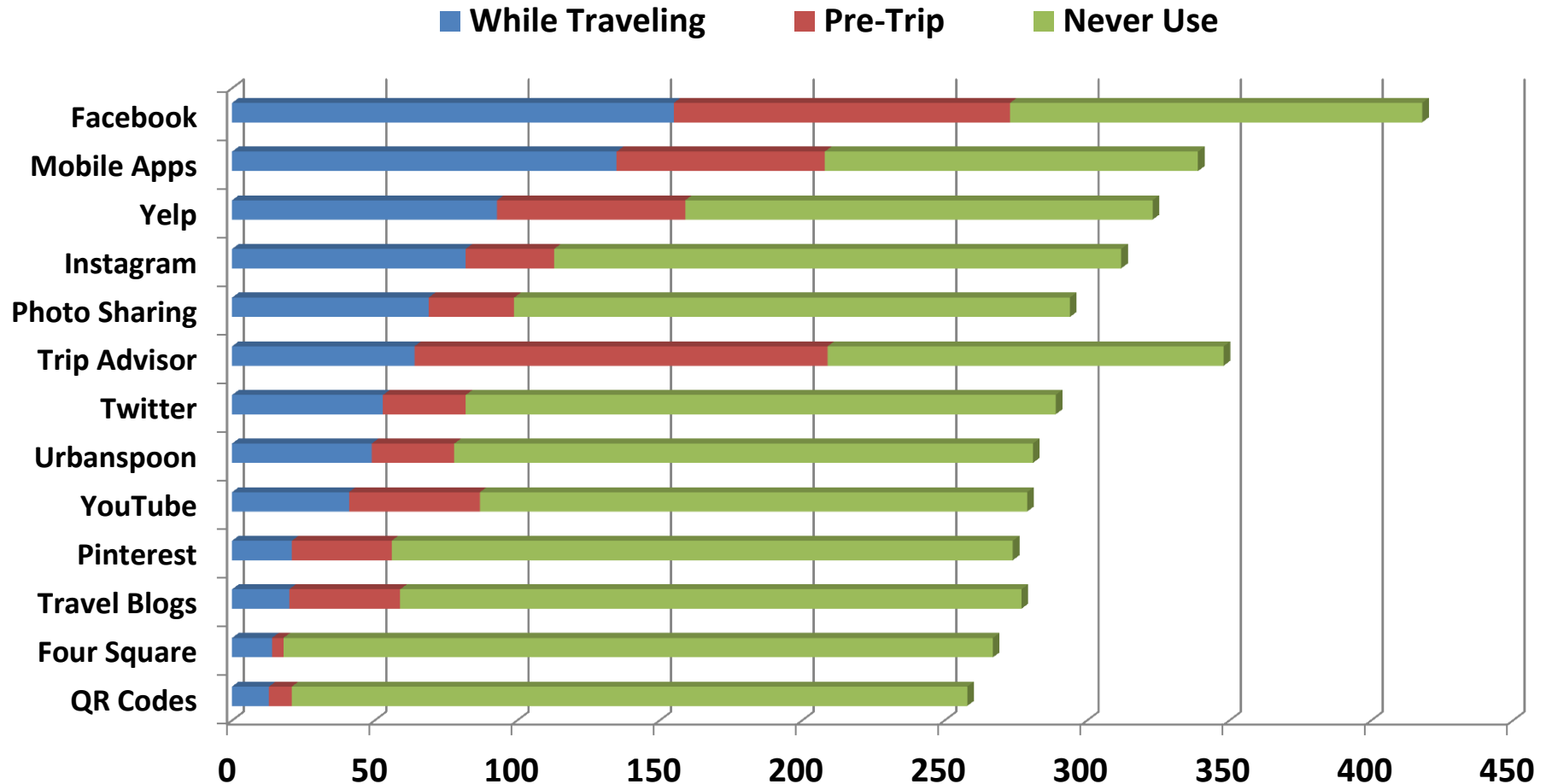
Did family members accompany you on this trip?



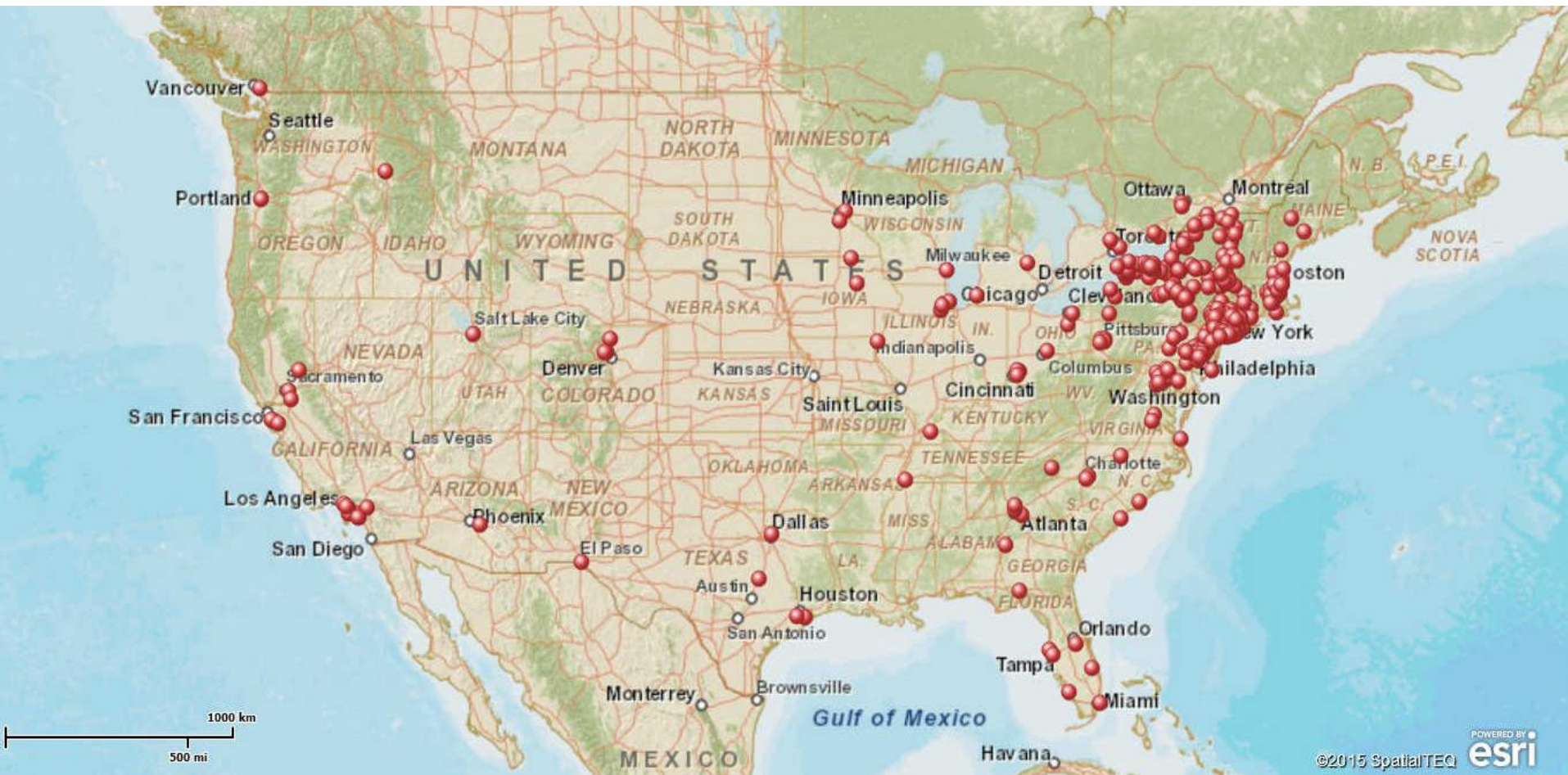
If you extended your stay beyond the conference/meeting, please tell us by how many nights.



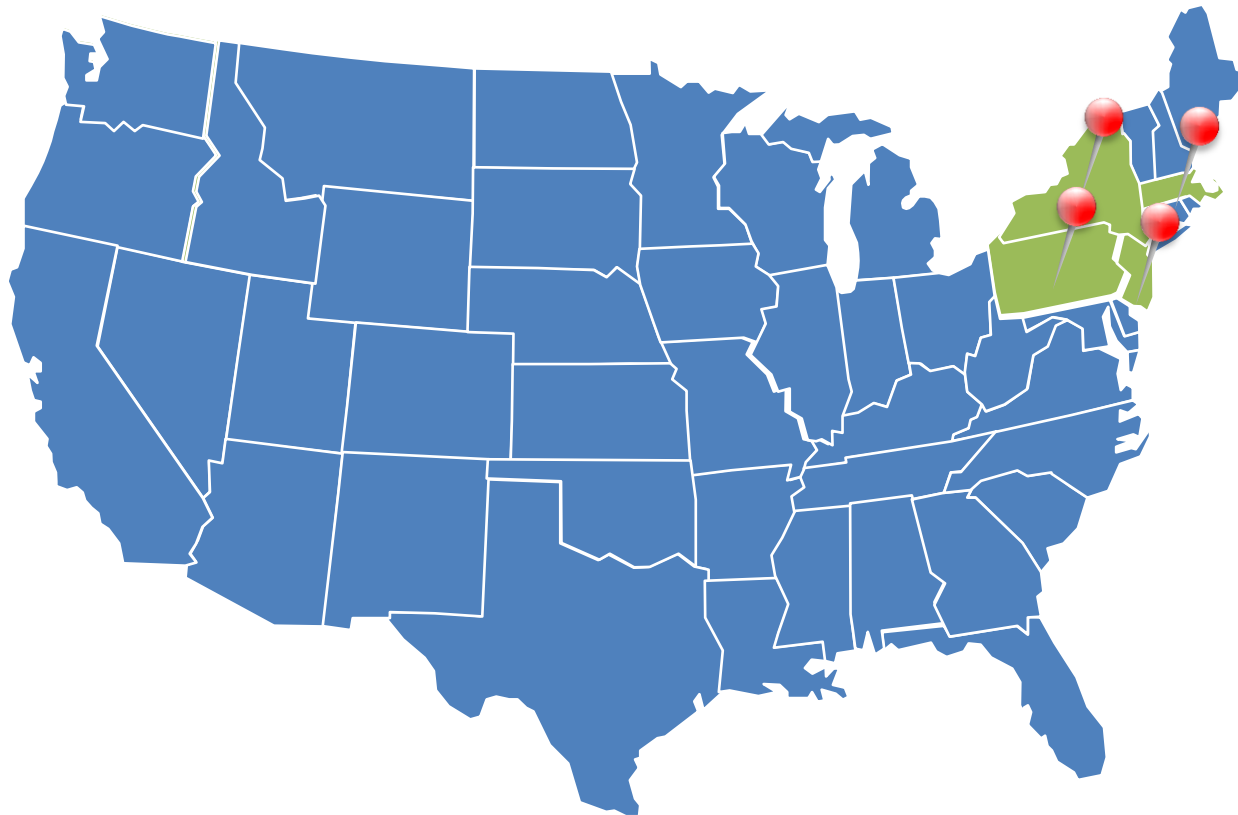
How did you use the following social media sites or applications as part of your travel to Central New York?



Point of Origin – Bus/Conf/Mtg/Univ



Top 4 Points of Origin – Bus/Conf/Mtg/Univ



1 – New York – 54.0%

2 – Pennsylvania – 6.8%

3 – New Jersey – 6.8%

4 – Massachusetts – 6.0%



Central New York Neighboring County Visitors N=1,264



Neighboring County Visitor Demographics

■ Occupation:

- 15.8% - Retired
- 11.6% - Education-professor/teacher
- 10.7% - Healthcare industry
- 9.3% - Professional/Technical

■ Average Age:

- 46.16

■ Gender:

- Female – 66.2%
- Male – 33.8%

■ Level of education

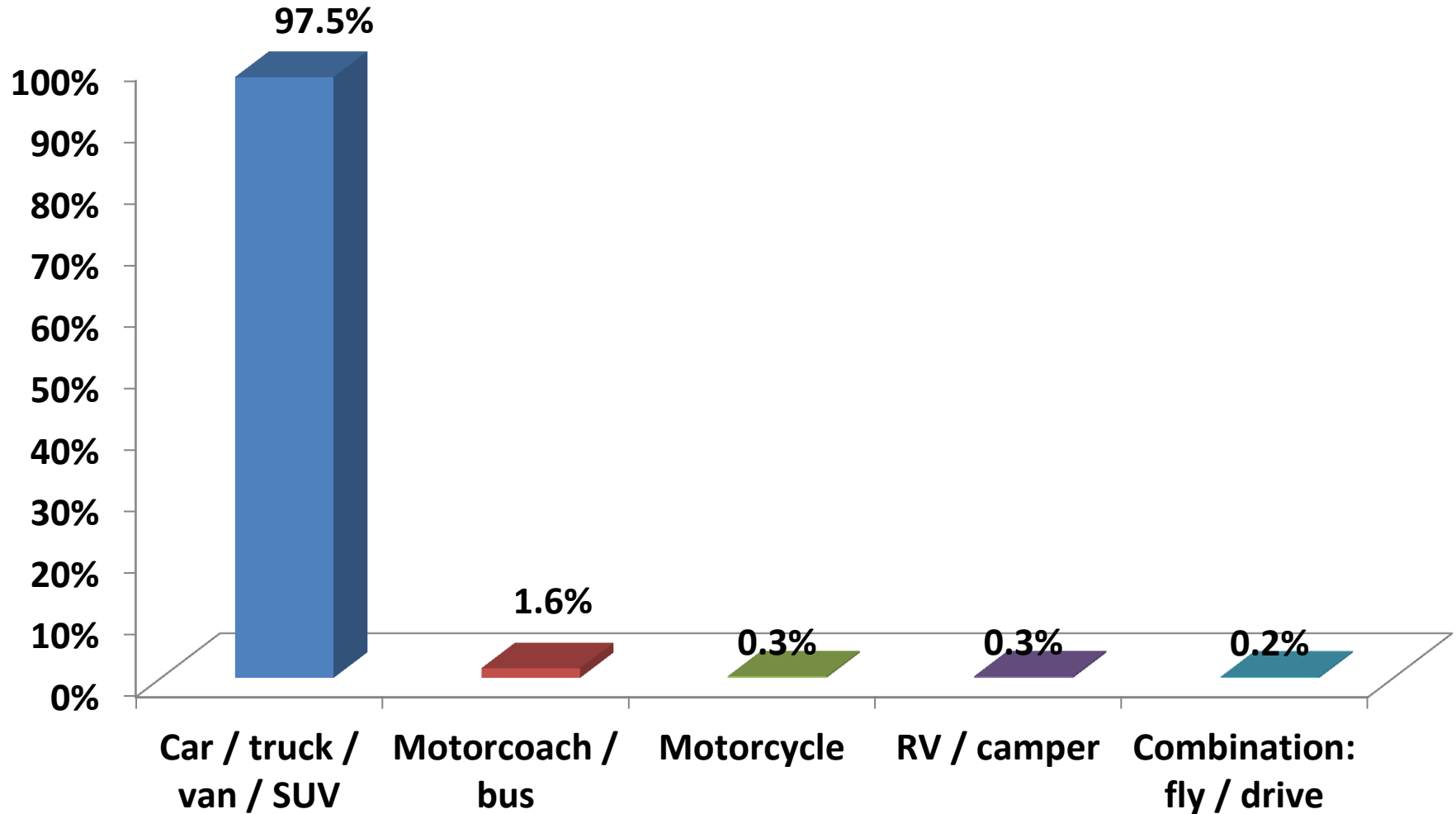
- 40.3% - College Degree
- 29.7% - Graduate School
- 19.0% - Some College
- 7.5% - High School Graduate

■ Ethnicity:

- 87.9% - White/Caucasian
- 6.8% - Prefer not to answer
- 2.2% - Asian or Pacific Islander

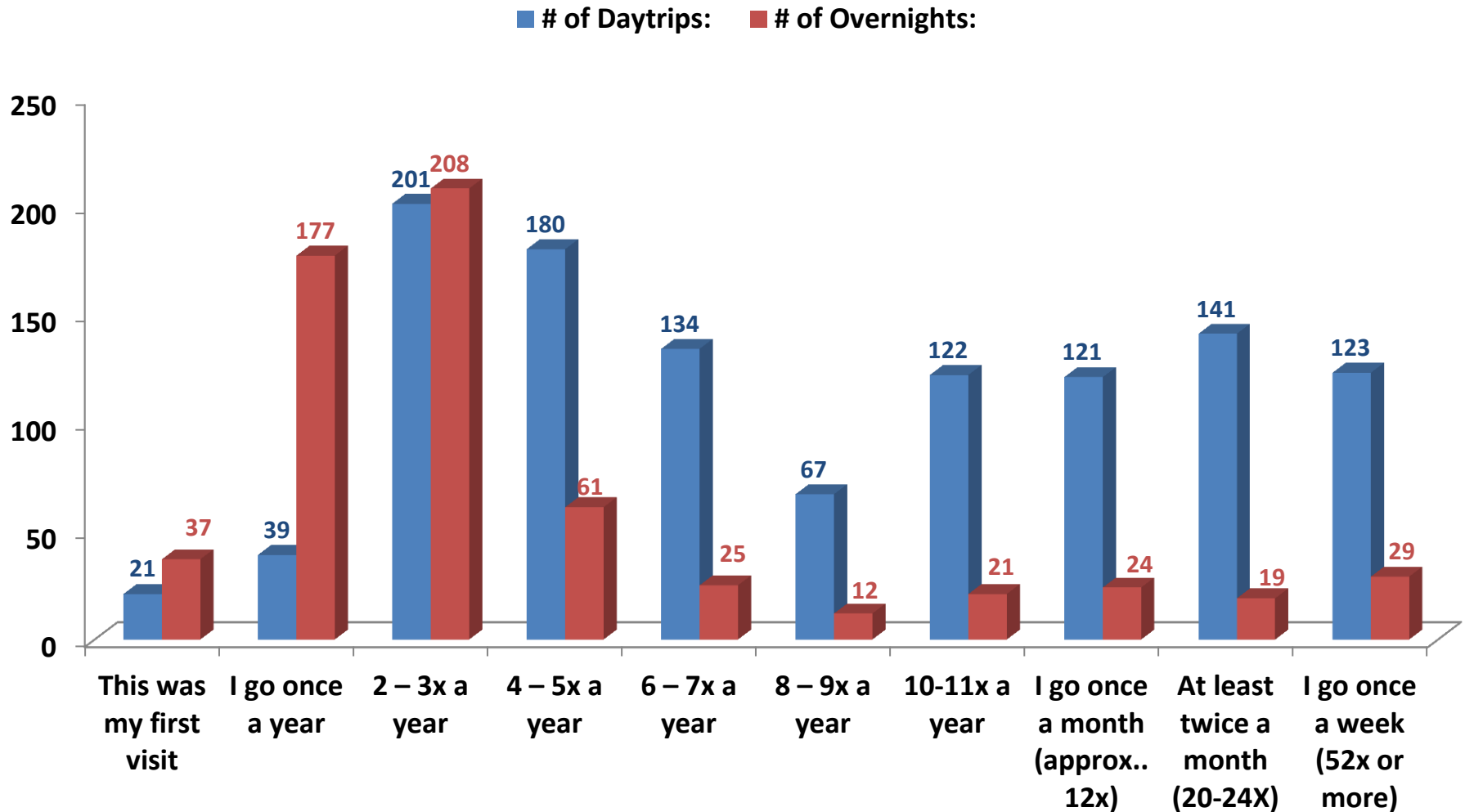
Central New York Neighboring County Residents

What PRIMARY mode of transportation did you use TO GET TO Central New York?

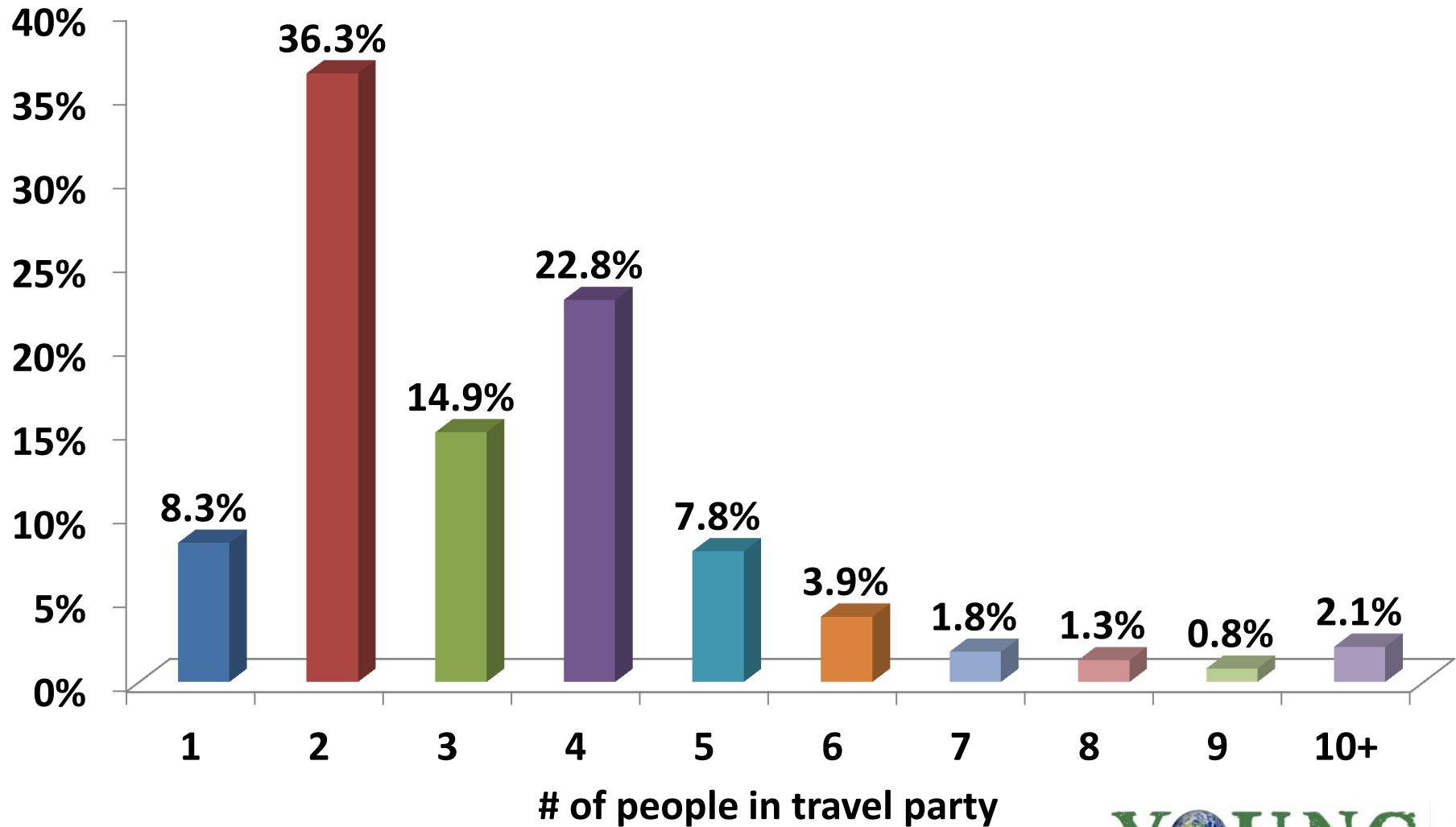


Central New York Neighboring County Residents

Annually, how many times do you typically visit Central New York?

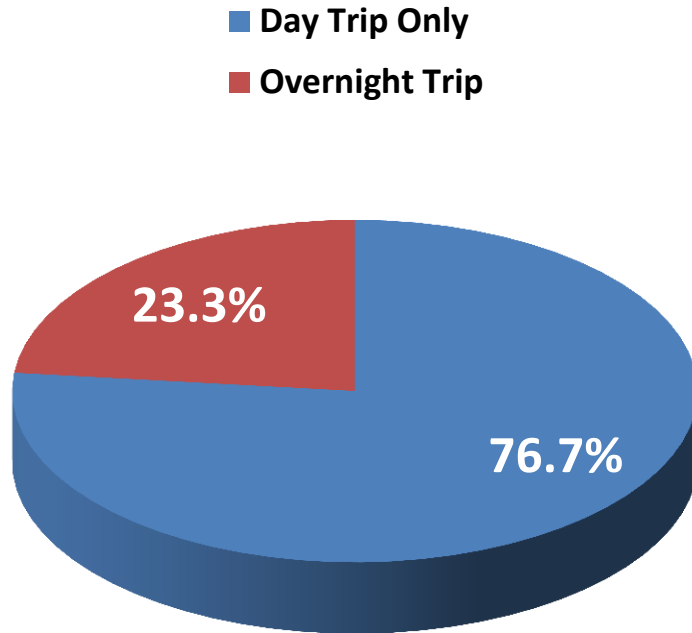


What was the total number of people in your travel party?

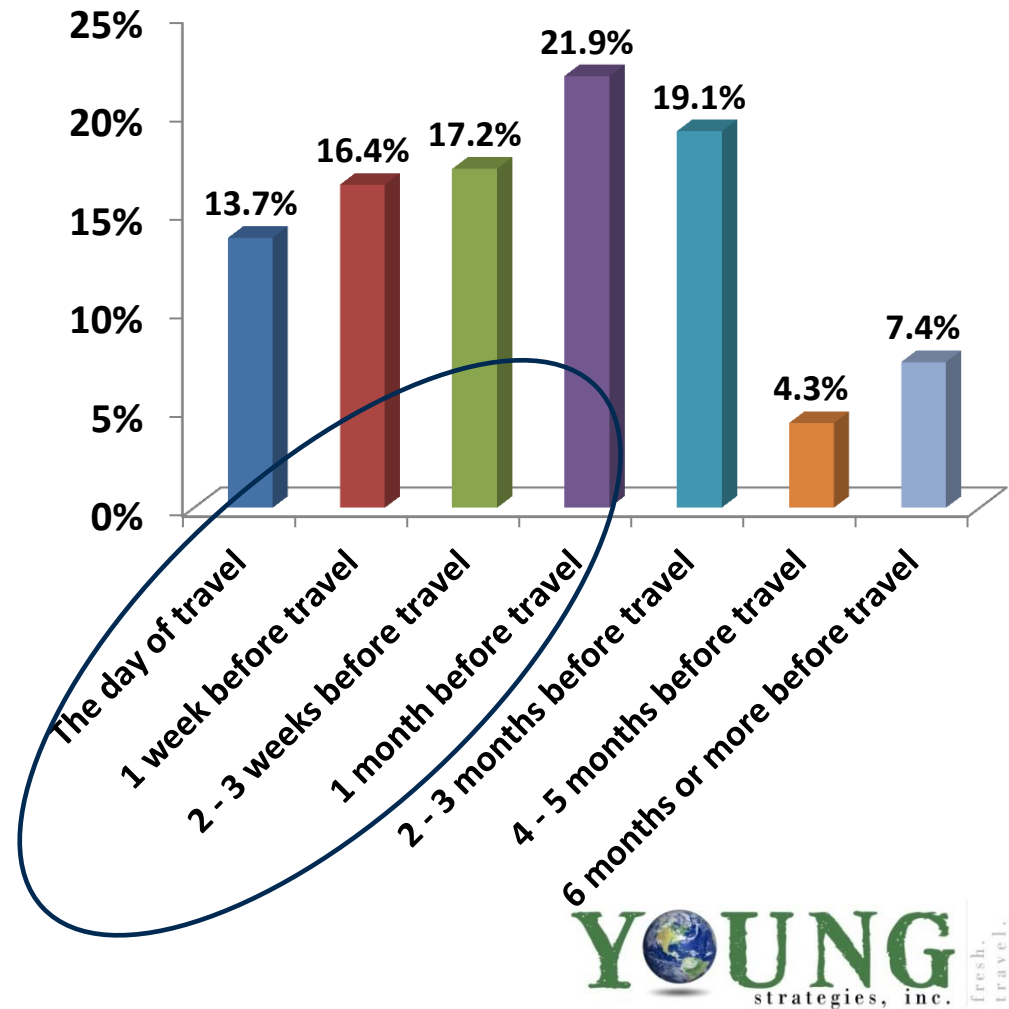


Central New York Neighboring County Residents

Was your most recent trip to Central New York a (an):

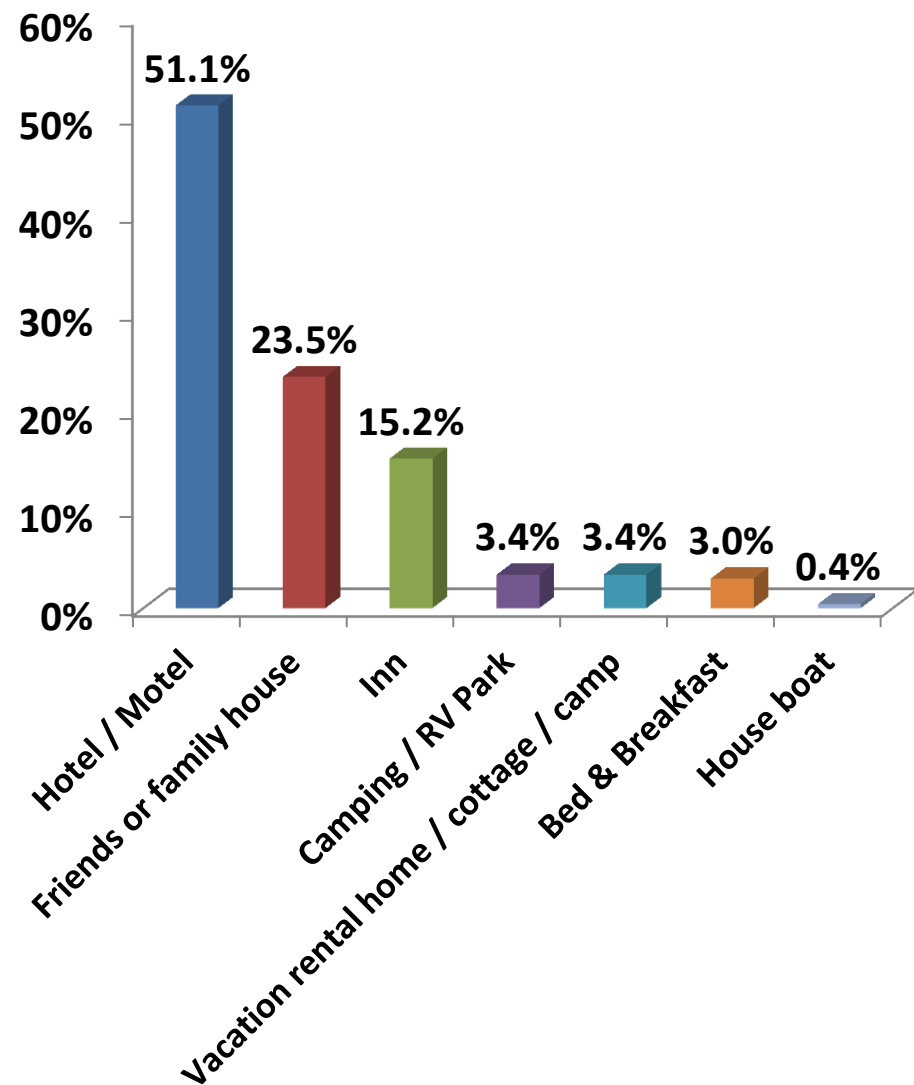


How far in advance did you book your accommodations for your most recent trip to Central New York?

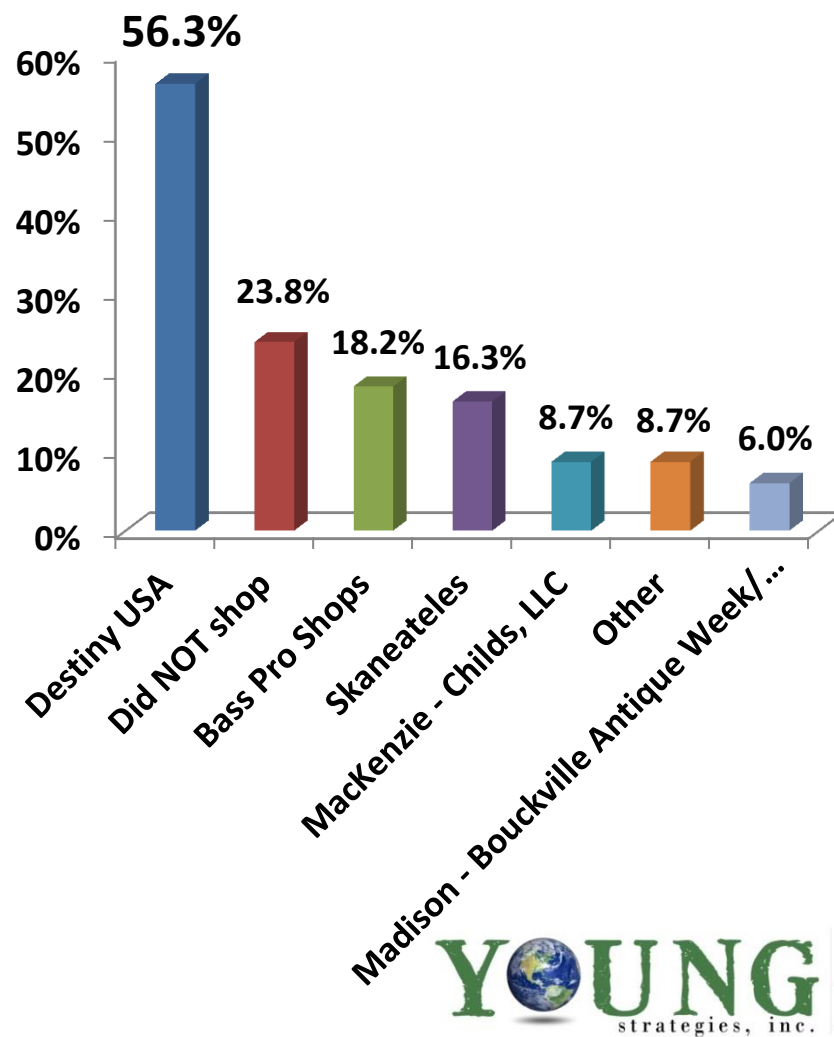


Central New York Neighboring County Residents

Where did you stay during your last visit to Central New York?

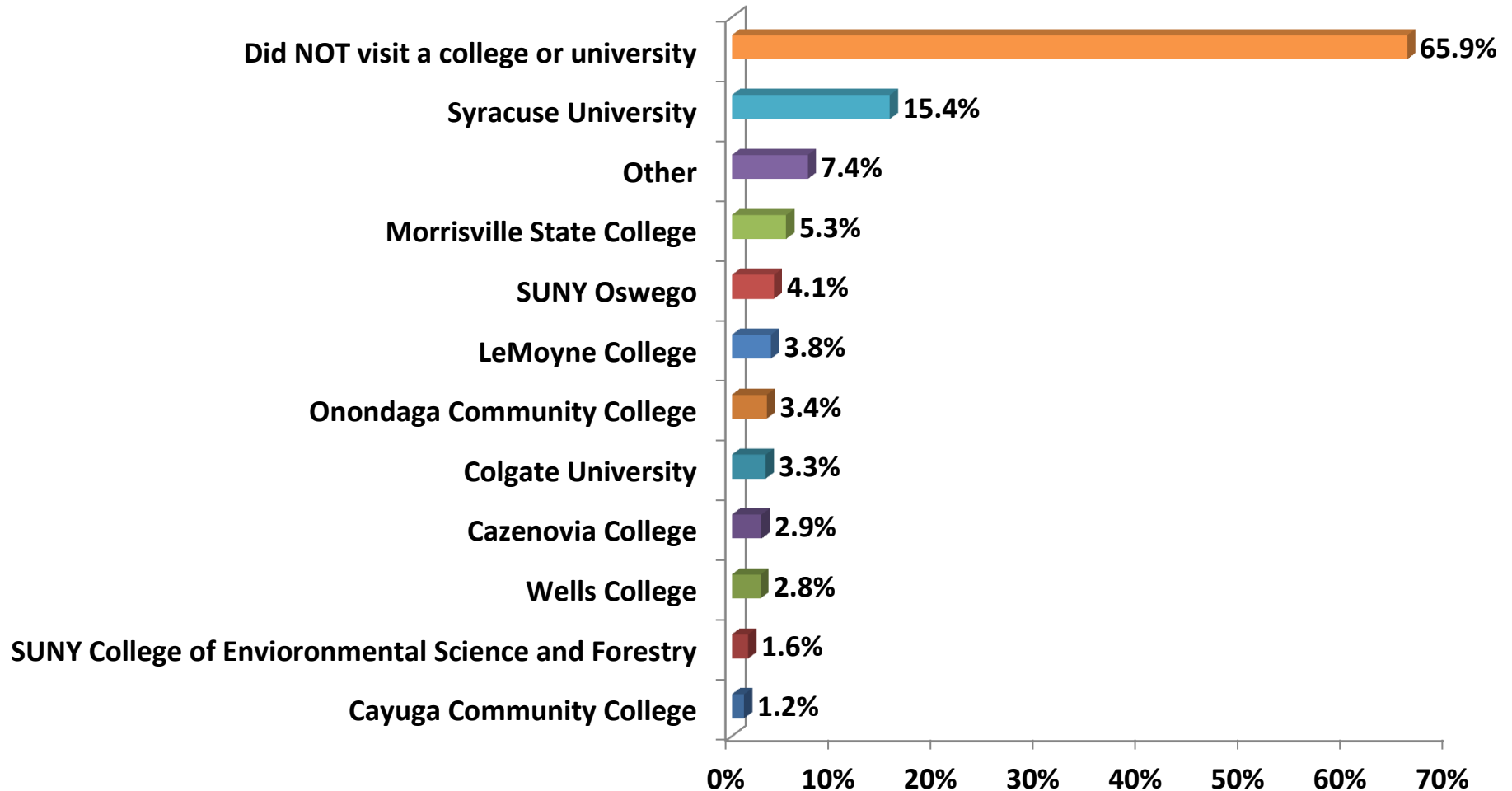


Did you SHOP at any of these major shopping areas while in Central New York. Please check ALL that you shopped at.



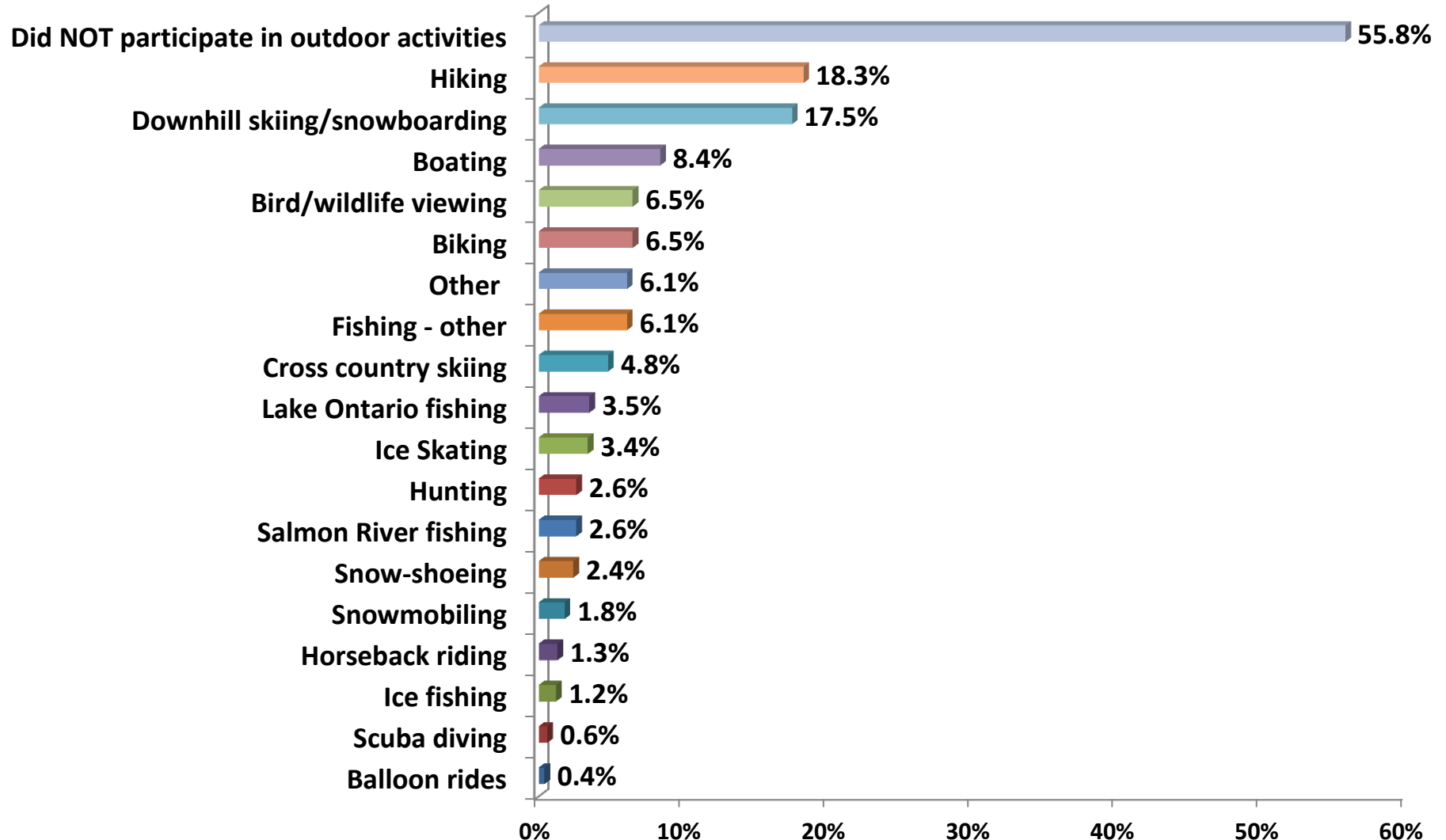
Central New York Neighboring County Residents

Did you visit a college or university? Please select ALL you visited.



Central New York Neighboring County Residents

Check ALL outdoor activities you participated in.



Top 5 activities neighboring county visitors reported participating in:

1. Shopping – 55%
2. Dining – Fine or local culinary – 53%
3. Driving / sightseeing – 28%
4. Wineries – 18%
5. Visited other friends & family – 17%

Other Activities Reported

Skiing / snowboarding	15.7%	Theatre	9.6%	Business	5.5%	Reunion	3.8%
Festival / event	14.3%	Hiking	9.4%	Fishing	5.4%	Biking / cycling	3.7%
Concert / live performance	13.8%	Other	9.3%	Meeting / conference / training	5.2%	Racing	2.9%
Antique shopping	13.0%	Sports event	8.8%	Sleep late / take a nap	4.6%	Motorcycle riding	1.8%
Farmers markets / U-picks	13.0%	Casino / gaming activities	8.3%	Spa treatment	4.6%	Snowmobiling	1.7%
Breweries	12.5%	Boating	7.4%	Bird watching	4.4%	Hunting	1.6%
Historic site / museum	11.6%	Camping	6.9%	Wedding	4.1%	Horse / Equine	1.4%
College / University	11.3%	Art venues, galleries, studios	6.8%	Golf	3.9%		

How much did you pay for your lodging/accommodations WHILE IN Central NY?

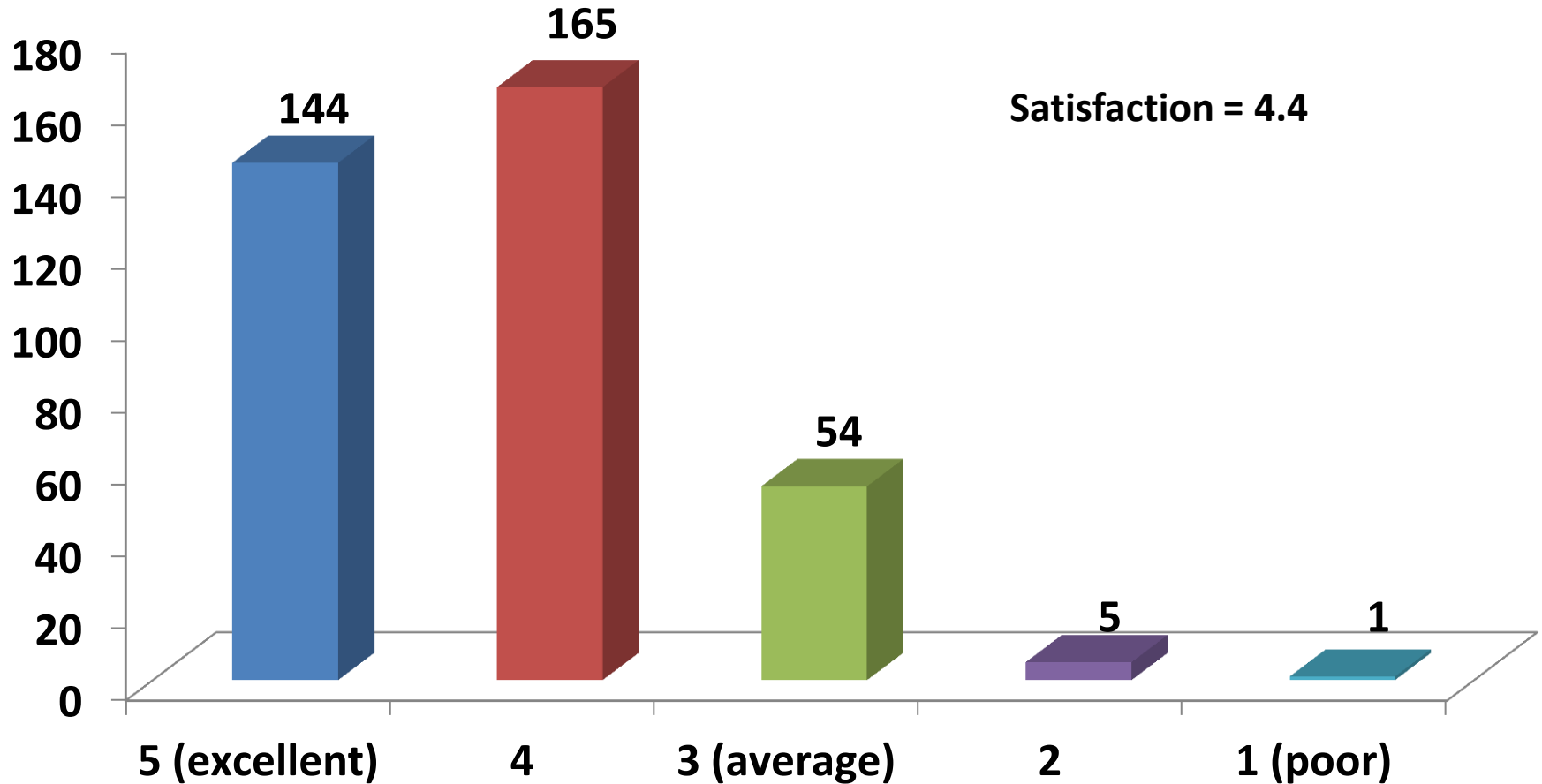
Answer Options	Neighboring Counties Overnight N = 273	Neighboring Counties Daytrip N = 900
Lodging:	\$261.86 (171)	N/A .

How much did your party spend WHILE IN Central NY?

Answer Options	Neighboring Counties Overnight	Neighboring Counties Daytrip
Dining/Meals	\$162.13 (215)	\$101.17 (738)
Shopping	\$186.92 (132)	\$225.28 (492)
Recreational	\$166.09 (69)	\$159.05 (255)
Local Transportation	\$58.05 (74)	\$60.44 (212)
Wineries/Breweries/Distilleries	\$69.90 (70)	\$122.36 (145)
Attractions/Events	\$111.67 (45)	\$92.11 (189)
Casino/Gaming	\$318.33 (24)	\$139.50 (58)
Total Spending	\$586.81 (234)	\$377.00 (789)

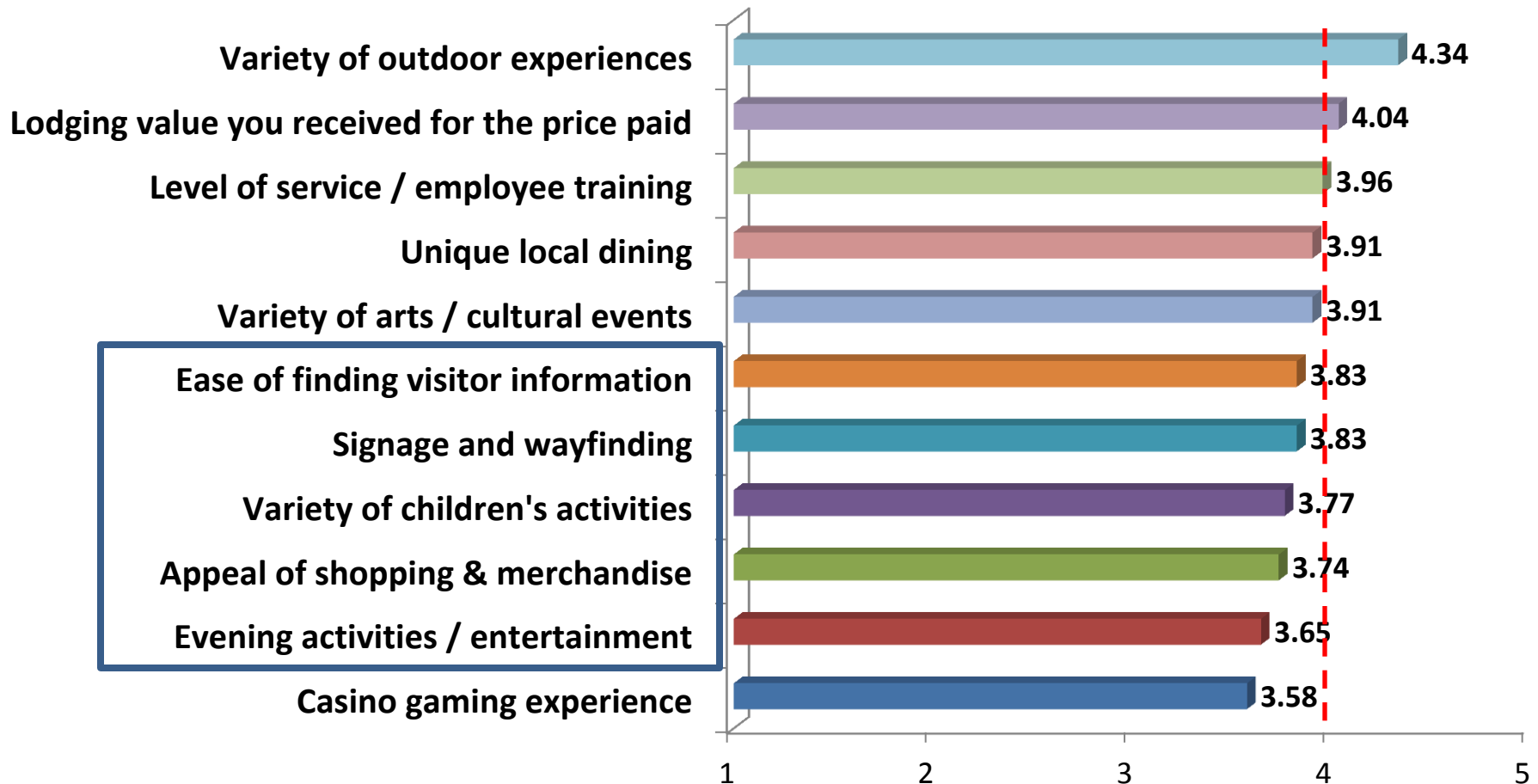
Central New York Neighboring County Residents

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your experience visiting Central New York?



Central New York Neighboring County Residents

Considering this visit to Central New York, please rate each of the following amenities on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent). If you did not participate in any of the activities please check "N/A". Check one rating for each.



What words would you use to describe Central New York?



Central New York Neighboring County Residents

Point of Origin

State - City													
NEW YORK													
Ithaca	107	Johnson City	9	Tully	4	Albany	2	Honeoye Falls	2	Watkins Glen	2	Central square	1
Rochester	65	Penfield	9	West Winfield	4	Amherst	2	Irondequoit	2	Waverly	2	Chadwicks	1
Binghamton	56	Seneca Falls	9	Williamson	4	Baldwinsville	2	Jamesville	2	West Monroe	2	Chaumont	1
Rome	31	Waterville	9	Windsor	4	Barton	2	LaFargeville	2	Williamstown	2	Cheektowaga	1
Utica	30	Whitesboro	9	Bainbridge	3	Berkshire	2	Little falls	2	Yorkville	2	Chenango	1
Watertown	27	Auburn	8	Brasher Falls	3	Big Flats	2	Liverpool	2	Penfield	2	Chenango Bridge	1
New Hartford	24	Clayton	8	Brockport	3	Blossvale	2	Lockport	2	Pine City	2	Chestertown	1
Endicott	23	Corning	8	Camillus	3	Boonville	2	Lyons	2	Vernon Center	2	Chittenango	1
Vestal	22	Freeville	8	Carthage	3	Caledonia	2	Mannsville	2	Adams Center	1	Churchville	1
Lansing	21	Ilion	8	Cooperstown	3	Castle Creek	2	Marion	2	Akwesasne	1	Clark Mills	1
Dryden	18	Apalachin	7	Holland Patent	3	Chenango forks	2	McDonough	2	Albion	1	Cold Brook	1
Groton	16	Buffalo	7	Interlaken	3	Cicero	2	Middleville	2	Allegany	1	Constableville	1
Geneva	15	Ontario	7	Kirkwood	3	Clay	2	Montour Falls	2	Ava	1	Cortland	1
Owego	15	Brooktondale	6	Lisle	3	Clayville	2	New York Mills	2	Baldwinsville	1	Croghan	1
Webster	14	Painted Post	6	Livonia	3	Cleveland	2	Norfolk	2	Barker	1	Deansboro	1
Norwich	13	Sherburne	6	Macedon	3	Clifton Park	2	Norwood	2	Belleville	1	Deer Park	1
Pittsford	13	Camden	5	Maine	3	Conklin	2	Oneida Castle	2	Bloomfield	1	Depew	1
Canandaigua	12	Clyde	5	Marcy	3	Copenhagen	2	Oneonta	2	Bloomington	1	Deposit	1
Horseheads	12	Herkimer	5	Mohawk	3	Deerfield	2	Penn Yan	2	Boston	1	Dexter	1
Waterloo	12	Oxford	5	Oneida	3	Dolgeville	2	Red creek	2	Bridgeport	1	Downsville	1
Elmira	11	Sherrill	5	Oriskany	3	Durhamville	2	Rush	2	Bridgewater	1	Earlville	1
Fort Drum	11	Verona	5	Oswego	3	East Syracuse	2	Sackets Harbor	2	Brooklyn	1	East Meadow	1
Syracuse	11	Whitney Point	5	Ovid	3	Farmington	2	Salisbury Center	2	Burlington Flats	1	East Rochester	1
Endwell	10	Greene	4	Potsdam	3	Fayetteville	2	Savannah	2	Calcium	1	Edwards	1
Fairport	10	Lee center	4	Romulus	3	Frankfort	2	Schenectady	2	Candor	1	Elbridge	1
Trumansburg	10	Newfield	4	Stittville	3	Greece	2	Smithville Flats	2	Canton	1	Ellisburg	1
Victor	10	Palmyra	4	Taberg	3	Hancock	2	Sodus	2	Cassville	1	Endicrotch	1
Adams	9	Sauquoit	4	Vernon	3	Himrod	2	Spencer	2	Castorland	1	Etna	1
Clinton	9	Sidney	4	Wolcott	3	Homer	2	Sylvan Beach	2			Evans Mills	1

Central New York Neighboring County Residents

Point of Origin - Continued

State - City					
NEW YORK					
Floral Park	1	Lisbon	1	Northport	1
Forestville	1	Locke	1	Ogdensburg	1
Franklin	1	Lyons Falls	1	Old forge	1
Fulton	1	Manlius	1	Olean	1
Fultonville	1	Marathon	1	Osceola	1
Geneseo	1	Maryland	1	Otego	1
Genoa	1	Massena	1	Owasco	1
Gil	1	Mcconnellsville	1	Paqrish	1
Gilbertsville	1	Mecklenburg	1	Phelps	1
Glen Park	1	Mendon	1	Philadelphia	1
Gloversville	1	Mexico ny	1	Piffard	1
Greenwood	1	Middlesex	1	Port Crane	1
Greenwood lake	1	Milton	1	Port Jervis	1
Hamburg	1	Morris	1	Port Leyden	1
Hammondsport	1	Mount Upton	1	Pulaski	1
Harpursville	1	Mt Upton	1	Pultneyville	1
Hartwick	1	N Bangor	1	Queens	1
Hemlock	1	New Woodstock	1	Ramington	1
Henderson	1	New York	1	Remsen	1
Henderson Harbor	1	Newark	1	Rhinebeck	1
Henrietta	1	Newcomb	1	Richford	1
Heuvelton	1	Newport	1	Richville	1
Hoffmeister	1	Niagara Falls	1	Rochester/Fairport	1
Hogansburg	1	Niagara falls, on.		Rose	1
Holley	1	canada	1	Rotterdam	1
Jamesville	1	north bangor	1	Rushville	1
Kendall	1	North Chili	1	Russell	1
Lake clear	1	North Rose	1	Salisbury	1
Lima	1	North Syracuse	1	Sandy Creek	1
				Schoharie	1
				Scottsville	1
				Sharon Springs	1
				Shelburne	1
				Skaneateles	1
				Smyrna	1
				So Plymouth	1
				Sodus Point	1
				South New Berlin	1
				Spencerport	1
				Star Lake	1
				Staten island	1
				Theresa	1
				Three Mile Bay	1
				Town of Verona	1
				Troy	1
				Trumansburg	1
				Truxton	1
				Turin	1
				Unadilla	1
				Van Etten	1
				Verona beach	1
				W. Winfield	1
				Walesville	1
				Walton	1
				Walworth	1
				Weedport	1
				Wellsville	1
				Westerlo	1
				Whitney Point	1
				Willard	1
				Wilton	1



Central New York Residents Survey N= 4,628



Resident Demographics

■ Occupation:

- 15.1% - Retired
- 12.2% - Healthcare industry
- 11.9% - Education-professor/teacher
- 8.5% - Student

■ Average Age:

- 44.3

■ Gender:

- Female – 73.0%
- Male – 27.0%

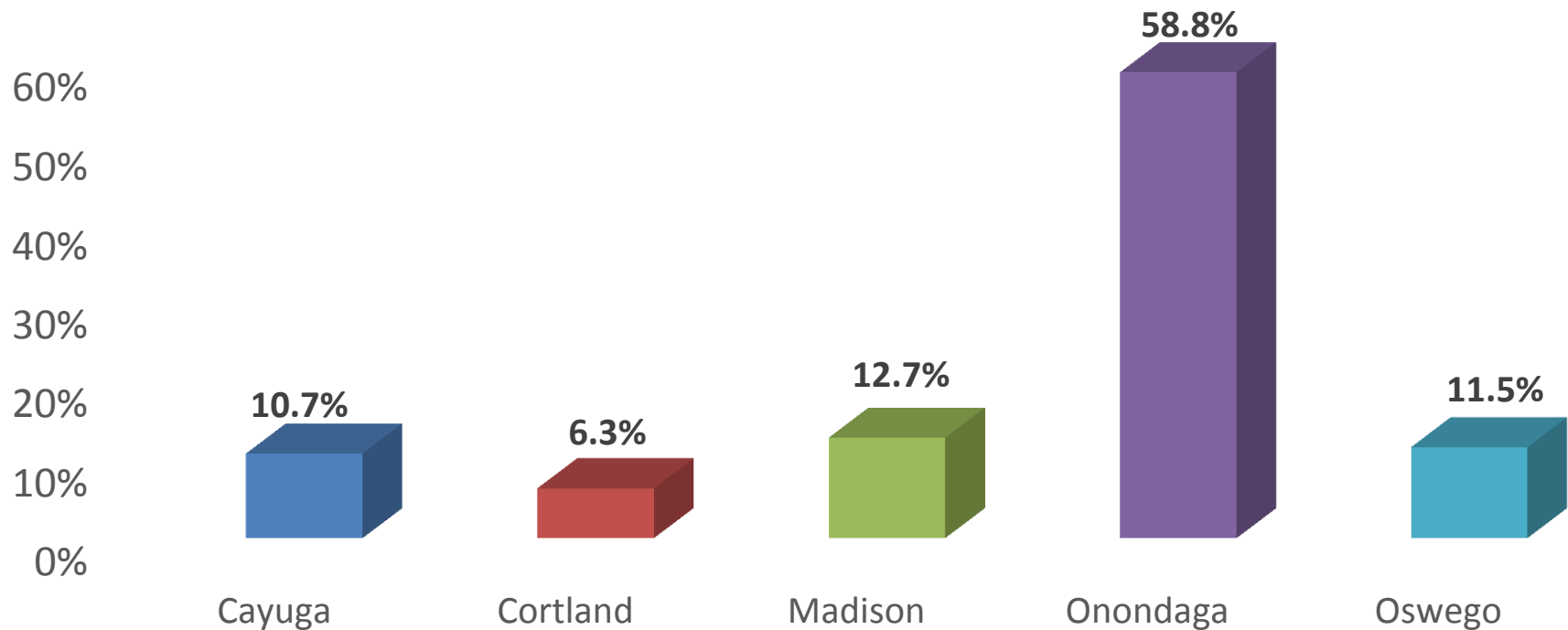
■ Level of education

- 38.5% - College Degree
- 27.9% - Graduate School
- 18.8% - Some College
- 10.9% - High School Graduate

■ Ethnicity:

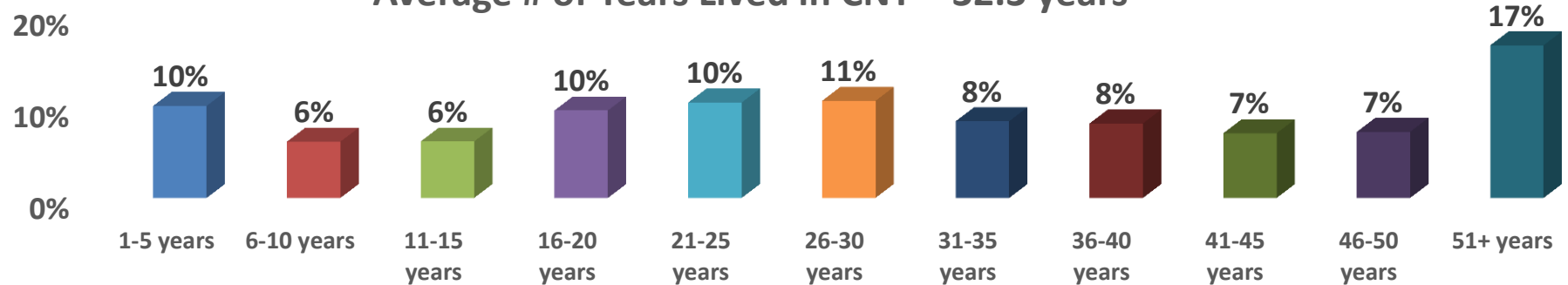
- 87.0% - White/Caucasian
- 5.1% Prefer not to answer

Please tell us in which county you reside?



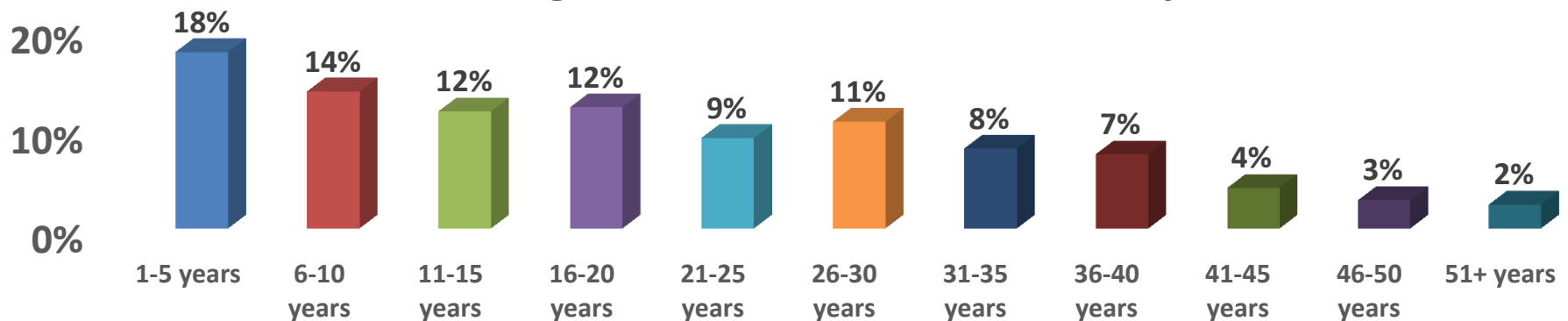
How many years you have lived in Central New York?

Average # of Years Lived in CNY = 32.3 years



How many years you have worked in Central New York?

Average # of Years Worked in CNY = 20.8 years



How many times in the LAST YEAR have you visited the other counties in the CNY Region. (Do not answer for the county you live in. Do not count your daily work .)

Daytrips

Answer Options	0	1-5	6-10	11-15	16-20	21-30	31-40	41-50	51+
Cayuga	725	1317	256	82	80	34	28	17	70
Cortland	800	1431	217	76	34	28	19	11	65
Madison	1030	985	190	92	54	39	25	15	73
Onondaga	314	339	228	147	158	123	104	102	480
Oswego	788	1242	257	90	70	49	30	24	122

Overnight Trips

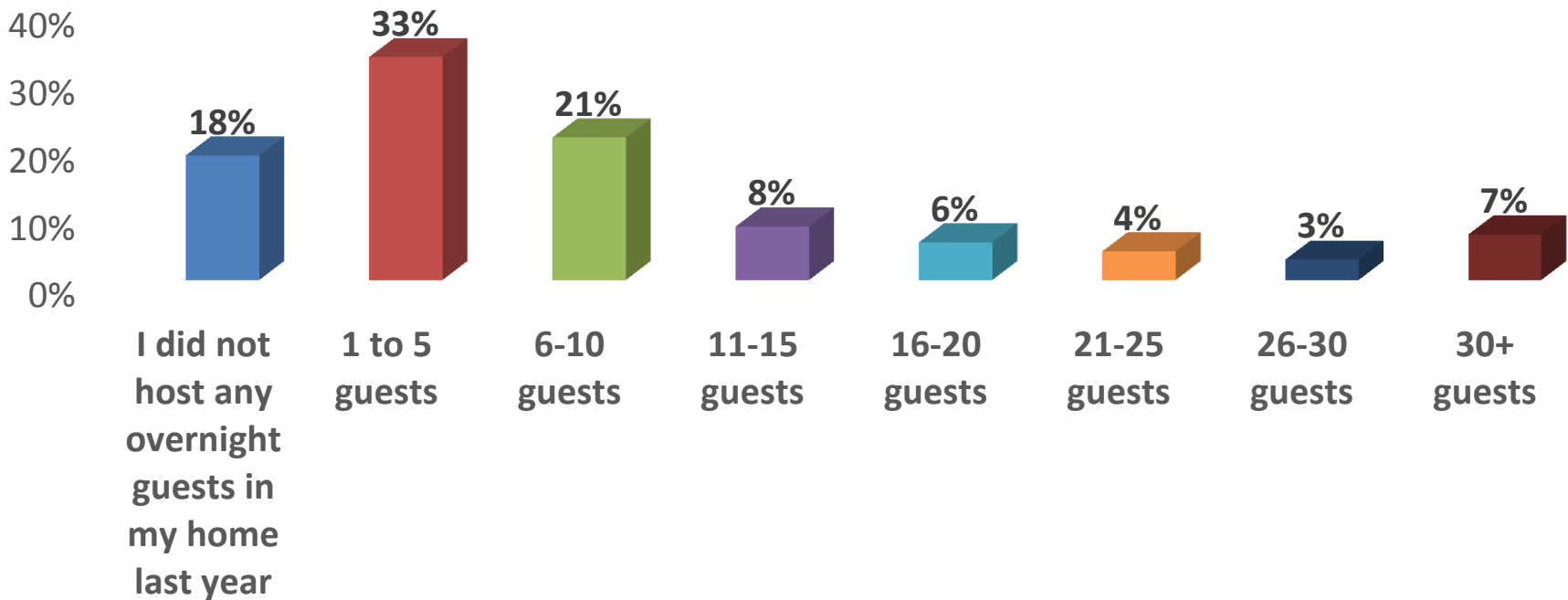
Answer Options	0	1	2	3	4	5	6	7	8
Cayuga	1229	117	104	38	17	16	9	5	2
Cortland	1315	75	89	24	10	13	8	4	3
Madison	1250	65	58	25	5	12	6	3	1
Onondaga	756	65	78	32	22	31	10	8	3
Oswego	1203	92	86	40	17	23	4	5	3

Please tell us about your visitation to the CNY counties listed below

Answer Options	Cayuga	Cortland	Madison	Oswego	Onondaga
Dining-casual	1143	950	735	982	1448
Shopping-everyday	458	281	281	330	1295
Shopping-specialty	471	206	239	234	1169
Festival /event / concert	616	473	398	659	1166
Dining-fine	448	187	285	216	981
Sporting event	245	277	184	255	886
Outdoor recreation- biking, hiking, boating, etc.	771	613	528	763	820
Museums	376	191	209	208	650
Historic sites	533	288	354	468	516
Wineries / breweries	1020	222	232	125	386
Winter recreation-skiing, snowboarding, etc.	180	388	173	188	366
Fishing	257	161	173	367	283
Horse / equine	77	57	100	68	165

Total number of people you hosted in your home in a year?

Average # of Guests Hosted = 11.3



Please check all the activities your friends, family or business guests did while visiting you.

TOP 10 in BOLD

Activities	Responses	Activities	Responses
Dining - Fine or local culinary	70.1%	Wedding	24.1%
Shopping	65.5%	Reunion	23.6%
Driving / sightseeing	55.1%	Theatre	23.4%
Visited other friends & relatives	50.1%	Boating	23.0%
Farmers markets / U-picks	43.2%	Camping	23.0%
Festival / event	41.7%	Fishing	21.7%
Antique shopping	31.6%	Biking/cycling	19.7%
Concert / live performance	31.2%	Golf	16.9%
Hiking	30.4%	Skiing / snowboarding	16.2%
Sleep late / take a nap	30.0%	Art venues, galleries, studios	16.0%
Wineries	29.5%	Business	13.1%
Sports event	29.2%	Spa treatment	12.7%
Historic site / museum	27.7%	Hunting	11.9%
College / University	27.4%	Bird watching	11.3%
Casino / gaming activities	26.8%	Meeting / conference / training	10.0%
Breweries	26.7%	Racing	8.3%

When hosting out-of-town guests, what other New York communities do you typically visit?
(Communities NOT located in Central New York. TOP 5 in BOLD)

Activities	Responses
Niagara Falls	37.0%
Old Forge / Inlet	36.9%
Alexandria Bay	36.7%
Ithaca	36.5%
Rochester	29.1%
Waterloo	27.9%
Cooperstown	21.6%
Watkins Glen	19.0%
Seneca Falls	15.0%
Corning	14.3%
Utica	13.7%
Canandaigua	13.0%
Geneva	11.8%
Watertown	10.6%
Binghamton	8.9%
Rome	8.8%

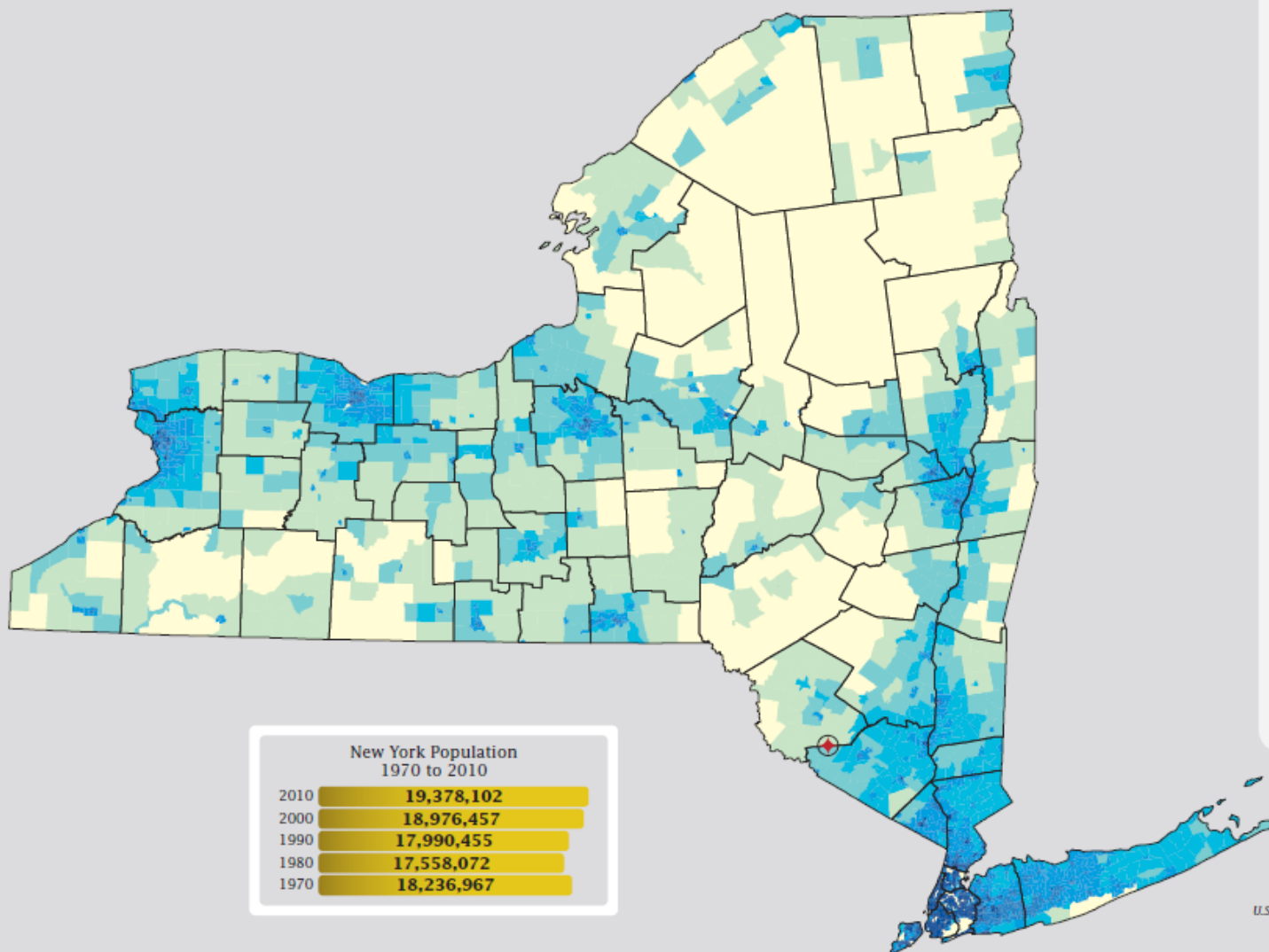
- Diverse region of 5 counties, each unique, spending on the rise
- Most travelers within upstate New York region have visited
- Best demo - ages 30 – 65, couples, educated
- 3 night typical stay
- Spending: Overnight \$1,000, Daytrip \$350
- Web/digital marketing is key – local, regional state sites
- TripAdvisor, Facebook, Mobile apps, Yelp, YouTube, Blogs, Pinterest
- Canadians come to shop at Destiny & eat & site-seeing
- USA comes for unique experiences – dining, shopping, site seeing & outdoor
- Over ½ book within 30 days
- Summer, Fall, Spring, Winter
- Need to improve wayfinding, unique shopping, evening entertainment

Neighboring Counties & Residents

- 45% spend the night at least 1x a year
- Most are daytrippers at least 1x a month
- Travel party is same as visitors
- Shopping & dining are most popular

2010 Census: New York Profile

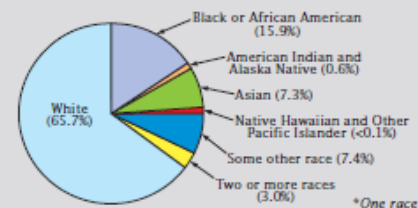
Population Density by Census Tract



New York Population 1970 to 2010

2010	19,378,102
2000	18,976,457
1990	17,990,455
1980	17,558,072
1970	18,236,967

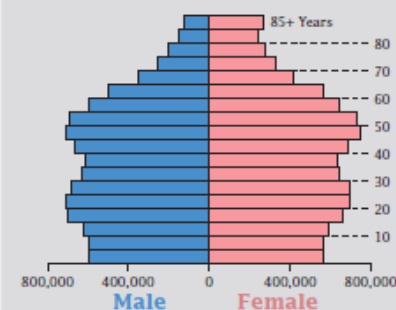
State Race* Breakdown



Hispanic or Latino (of any race)
makes up 17.6% of the state population.

Population by Sex and Age

Total Population: 19,378,102

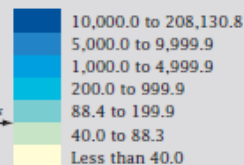


Housing Tenure

Total Occupied Housing Units:
7,317,755

53.3% Owner Occupied	46.7% Renter Occupied
Average Household Size of Owner-Occupied Units: 2.71 people	Average Household Size of Renter-Occupied Units: 2.41 people

People per Square Mile by Census Tract



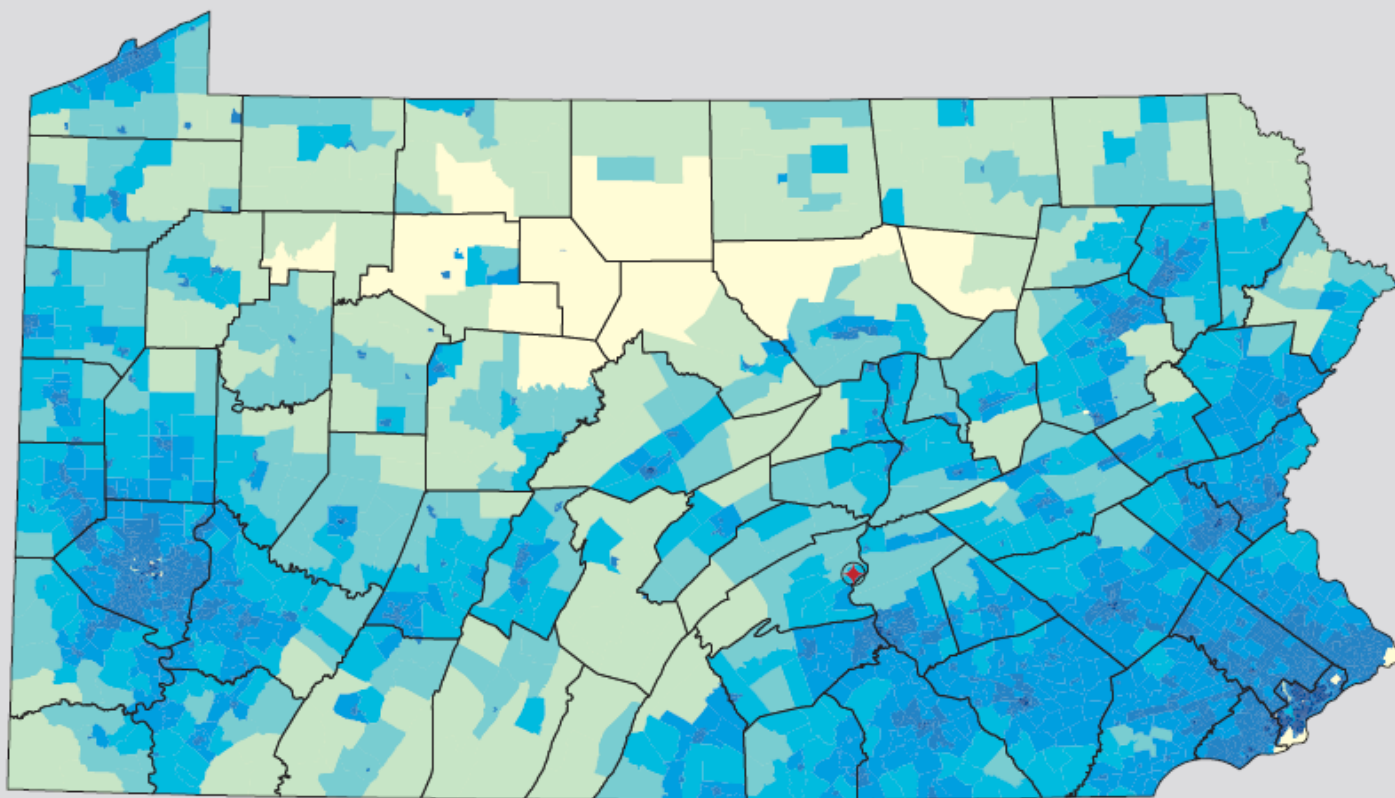
U.S. density is
88.4

County Boundary

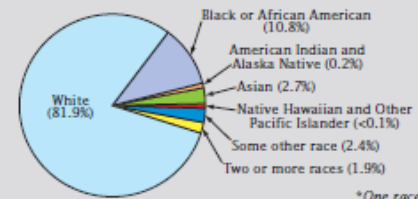
New York Mean Center
of Population

2010 Census: Pennsylvania Profile

Population Density by Census Tract



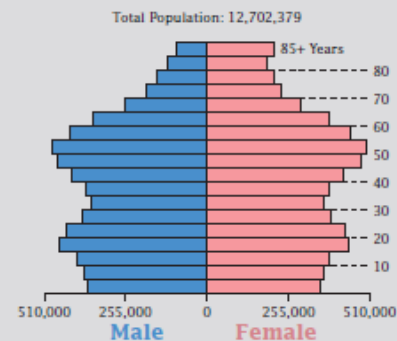
State Race* Breakdown



*One race

Hispanic or Latino (of any race)
makes up 5.7% of the state population.

Population by Sex and Age



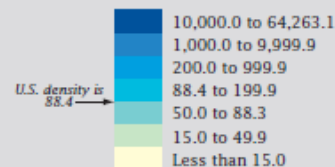
Housing Tenure

Total Occupied Housing Units:
5,018,904

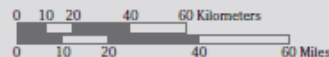
69.6% Owner Occupied 30.4% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.57 people
Average Household Size of Renter-Occupied Units: 2.16 people

People per Square Mile by Census Tract



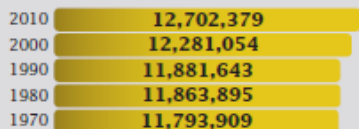
U.S. density is 88.4



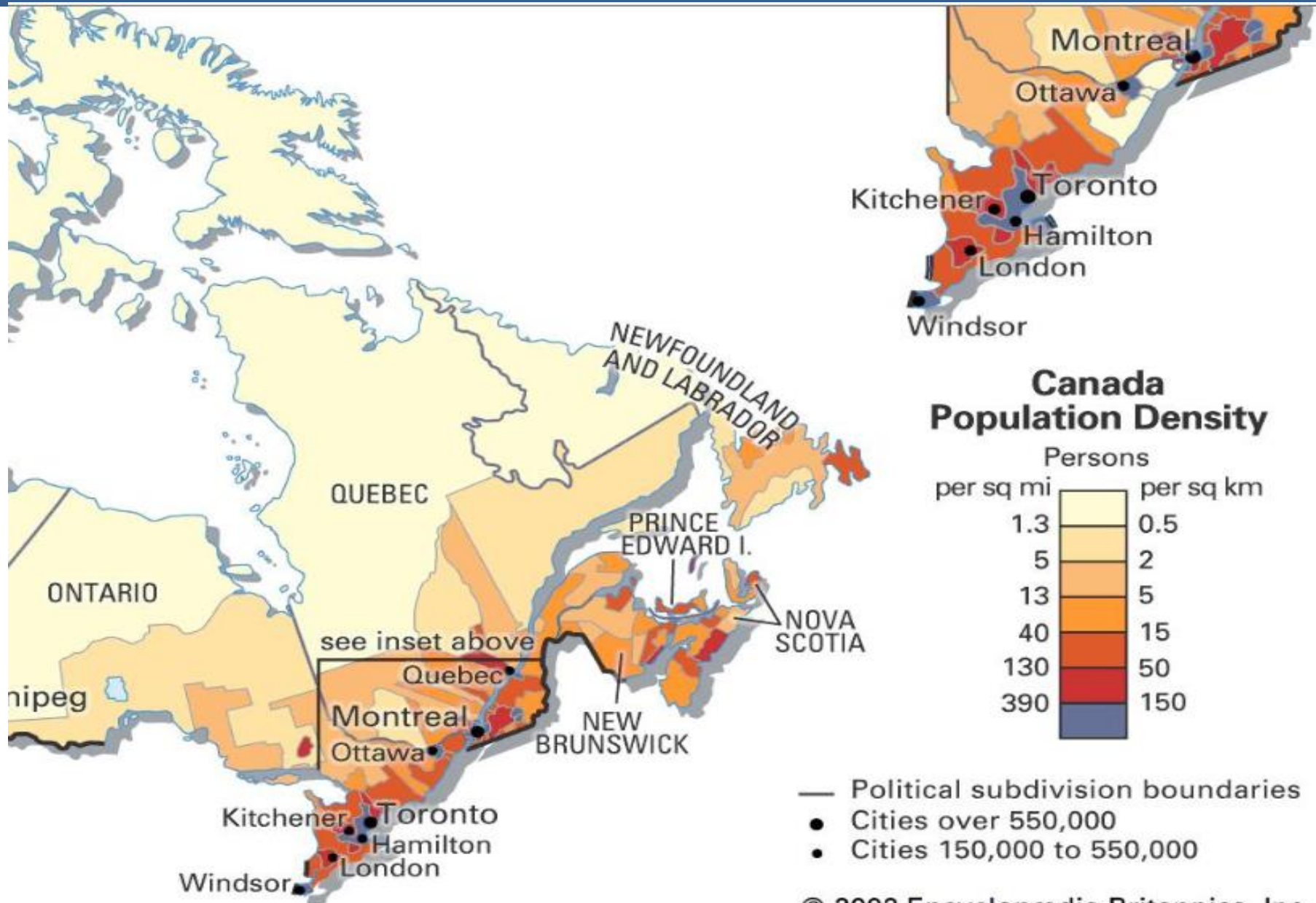
County Boundary

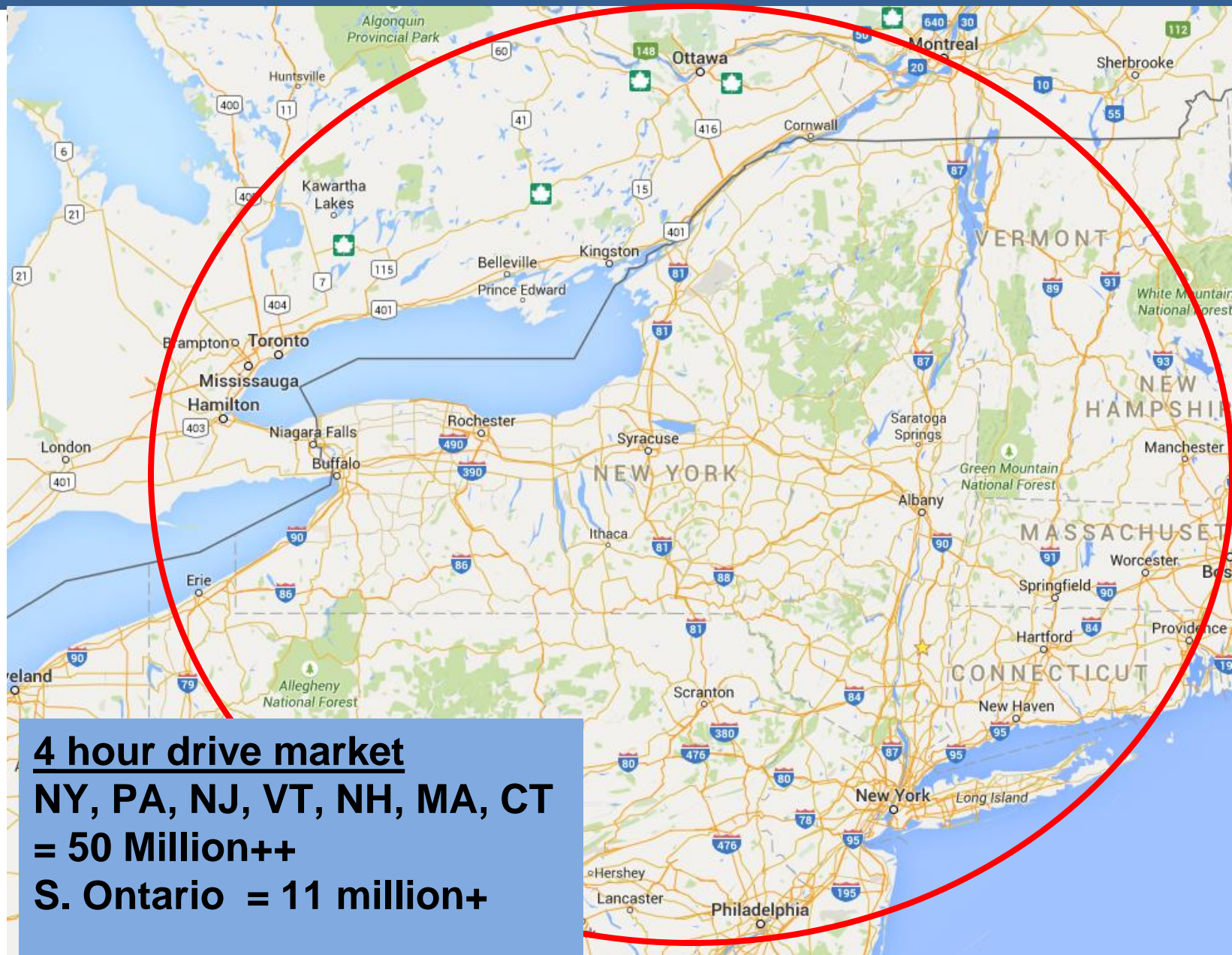
Pennsylvania Mean Center of Population

Pennsylvania Population 1970 to 2010



Eastern Canada Population Density





4 hour drive market

NY, PA, NJ, VT, NH, MA, CT

= 50 Million++

S. Ontario = 11 million+

- **Very mature market on the product life-cycle curve**
- **Saturation in the core hour market - there is little growth to be found in the core markets, they are already coming – huge repeat visitation.**
- **Development of new unique year-round experiences (attractors) will generate interest among potential first-time visitors. Create unique experiences not found in upstate New York.**
- **Opportunity to dominate the state associations and meetings market based on geography, updated facilities, lodging and activities.**
- **NYC Metro & Philly are huge opportunities**
 - **BUT transportation is the biggest issue**
 - **It's cheaper and easier to fly anywhere rather than drive to CNY**
 - **Enhanced train service & car rentals are critical to success**

Contact Information

Berkeley Young,
Young Strategies, Inc

byoung@youngstrategies.com

704-677-4018

704-770-3333

www.facebook.com/berkeleyyoung

www.twitter.com/berkeleyyoung

