
1000 Islands



2016

Leisure Visitor Study: 1000 Islands Region New York

Thousand Islands International Tourism Council



EXECUTIVE SUMMARY

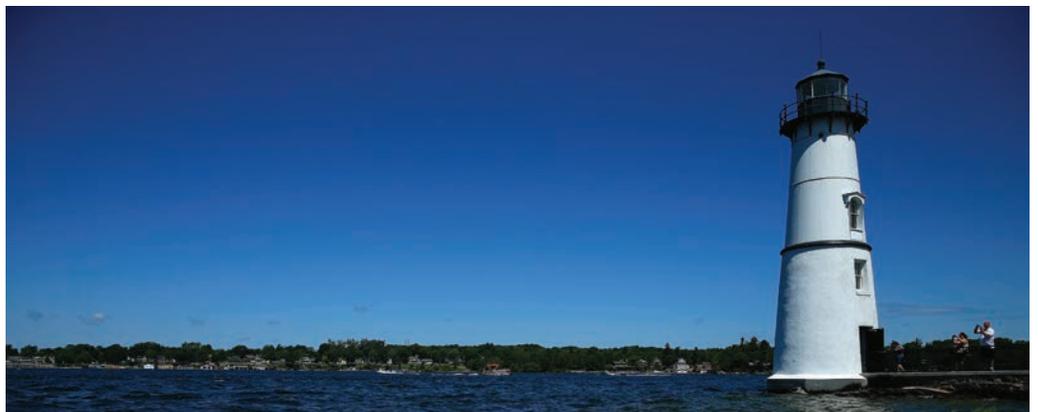
OVERVIEW

The 1000 Islands International Tourism Council commissioned a survey in 2015, via electronic mail and in person, to ascertain information about leisure visitors to the region. The study covered visits to the 1000 Islands occurring during fall 2014 through summer 2015. Over 3,800 survey responses in total were completed, comprising a 9.7% response rate.

Key findings within the study include:

- ✓ 60% of electronic survey respondents and 67% of intercept survey respondents are repeat visitors to the region.
- ✓ The vast majority are overnight visitors, with only 12% of electronic survey respondents and only 3% of intercept survey respondents reporting no overnight stays in the area.
- ✓ Average (and median) visitor party age of electronic survey respondents was 57 years old. Intercept survey respondents were slightly younger, reporting a median of 53 years and a mean of 51 years old.

- ✓ The mean reported visitor party size from the electronic survey is 4.3 persons, including 3 adults and 1.3 children. The intercept survey shows a party size just lower than this at 4 persons, including 2.3 adults and 1.7 children.
- ✓ The mean reported length of stay is approximately 4 nights (3.98 nights for electronic survey respondents and 3.83 for intercept survey respondents).
- ✓ The biggest proportion of respondent visitors came from western New York State (30%) or Canada (25%).
- ✓ Repeat visitation and having friends or family in the region are the strongest influences for visitors traveling to the 1000 Islands.
- ✓ Water-based activities are the most popular regional activities, including more than half of respondents to the electronic survey reporting taking scenic boat tours and visiting Boldt Castle. Visiting wineries and state parks, boating, visiting the antique boat museum and visiting the lighthouse are the next most common reported attractions.
- ✓ Restaurant options lead the list in the possibly limiting tourism infrastructure to entice visitors to stay longer in the region, followed by lodging options.
- ✓ Western New York State locations (Niagara Falls/Buffalo) and the Finger Lakes dominate the list of other destinations visited during the year.
- ✓ Travel is heavily dominated by peak summer visitation (at nearly 53%). Fall visitation is the second most popular season (32%).
- ✓ Hotels are by far the most popular lodging choice, comprising nearly half (47%) of reported lodging choices. The next most common selection is RV or other camping at 12% followed by private house or cabin rentals at 10%..
- ✓ Visitors report average total expenditures per party per trip at \$1,382, which averages \$326 per day using average length of reported stay. The largest components of these expenditures were hotel and meal costs. Intercept survey respondents reported slightly lower expenditures overall and particularly in lodging costs.
- ✓ Eighty-seven percent (87%) of respondents state that the information or advertisements viewed either reinforced plans for a trip, or helped convince them to take a trip not yet planned.
- ✓ Based on estimated visitation of 128,552 in 2014/15, estimated marketing costs per visitor are \$5.12.
- ✓ The return on investment for each marketing dollar spent by the 1000 Islands International Tourism Council is estimated at 63:1. This shows a high efficiency of marketing dollars used in relation to the return to the region from visitor spending.



METHODOLOGY



The 1000 Islands International Tourism Council engaged PlaceMaking to conduct research through a leisure visitor survey of its 2014/15 visitor season. The project team for this research includes project manager Victoria Zinser Duley- Principal with PlaceMaking, John Parmelee- faculty member of the SUNY Plattsburgh Hotel,

Restaurant, and Tourism Management division of the School of Business and Economics, and Lisa Cyphers- private statistician.

An electronic survey and in-person intercept survey were employed in order to gather visitor data. The survey instruments were designed collaboratively by PlaceMaking and the Council with the goal of gathering valuable information about leisure visitors to the region, including their expenditure levels.

The survey instrument was predicated on research for surveys with a similar purpose, and was further refined based on the experience of the tourism professionals involved in the research. The on-line survey was attractively designed and provided incentives to randomly-selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a relatively higher survey return rate without skewing data. The survey was distributed electronically by the Council to its list of potential visitors who had inquired for visitor information that year. This included 35,000 names which are traceable, direct inquiries generated by the office's marketing efforts which resulted in individuals providing their complete contact information. The electronic survey was sent in October 2015 with results analyzed in December 2015. A random sampling from the list were reminded of the opportunity to participate via a mailed postcard. The survey

resulted in 3,408 respondents for a response rate of 9.7%. The researchers feel confident in this rate of response providing valid information about visitor experiences.

An intercept survey, which included about half of the questions asked to electronic survey respondents, was also employed to allow for data comparison. Over four hundred (417) visitors were surveyed in person at multiple tourist destinations across Jefferson County, NY during summer and fall 2015. Since the intercept survey is a much smaller sample, the results reported are largely based on the electronic survey data. The following analysis details which group(s) are being reported within each variable.

CONVERSION RATE

The return on marketing investments is a key measure of this study, and is based substantially on measured conversion rate of visitors. The conversion rate is measured by comparing the number of traceable inquiries about the region in a given time period against the number of individuals that visited the region after receiving travel information. Direct traceable inquiries are defined by the Council's marketing efforts, resulting in individuals who provide contact information. It is important to recognize that

there were conceivably many more visits to the websites, or potential visitors who viewed travel information, than those who provided their contact information, and consequently many more visitors than what is tracked through the number of direct inquiries.

The following is an explanation of conversion analysis from Michigan State University¹:

Conversion studies estimate gross and net proportion of inquirers. Gross conversion rate involves the inquirers that took a trip to the destination after requesting travel information, while the net conversion rate involves the inquirers who traveled to the destination as a direct result of the travel information they received. Researchers and marketers use

conversion studies to compare the effectiveness of advertising placements.

These studies base their estimates on gross, net and length of stay conversion rates. These rates provide information about the effectiveness of promotional material. The gross estimate refers to the amount of people inquiring for information and traveling to [1000 Islands] after receiving the information, while the net estimate is about the direct influence of the [Council's] information on the decision to travel to [1000 Islands].

Return on Investment is determined by measuring estimated visitor expenditures divided by the marketing dollars spent.

CURRENT TOURISM INDUSTRY STATUS

According to the U.S Department of Commerce, activity and spending have showed positive growth continued over the last three years. International travel to the U.S is expected to increase annually through 2020 at an overall rate of 3.1%. This is similar to the 3% predicted for next five years nationally. Canada will remain as a top country from which international travel to the U.S. is generated (#3 behind Mexico and China). The exchange rates in 2015 and 2016 however, are dampening Canadian travel to U.S. The overall continued improvement of the travel sector nationwide since 2011/2012 is projected to continue for at least the next several years.



Survey Respondent VISITATION TO THE 1000 ISLANDS REGION

A majority of respondents were repeat visitors to the 1000 Islands region during the 2014/15 year. Sixty percent of electronic survey respondents stated that they had visited the region previously. An even higher figure (67%) of intercept survey respondents reported prior visits to the 1000 Islands region.

Repeat visitors provided a range of the number of their prior visits between 1 and 100. The average number of prior visits reported by electronic survey respondents was twelve. The average number of prior visits reported by intercept survey respondents was five visits. This was due to a cluster of respondents in the electronic survey who reported very high (however reasonable) numbers of prior visits.

Clearly, repeat visitors are a strong force within the region's tourism industry. Most visitors surveyed also reported that they stayed overnight in the region. Only 12% of both electronic survey respondents and 3% of intercept survey respondents stated that they were in the region for day trips only.

INCOME

Respondents were requested to select an annual household income range. Mean annual household income of visitor respondents is estimated at \$86,568 among electronic survey respondents and just below this, \$86,005 for intercept survey respondents. The median annual household income for both sets of respondents is \$70,000. This is well above the \$58,003 median household income level for New York State residents according to 2015 Census Bureau estimates.

AGE

The mean age as well as the median age reported for electronic survey responding visitors is 57 years old. Intercept survey respondents are slightly younger, with a mean age of 53 and a median age of 51.

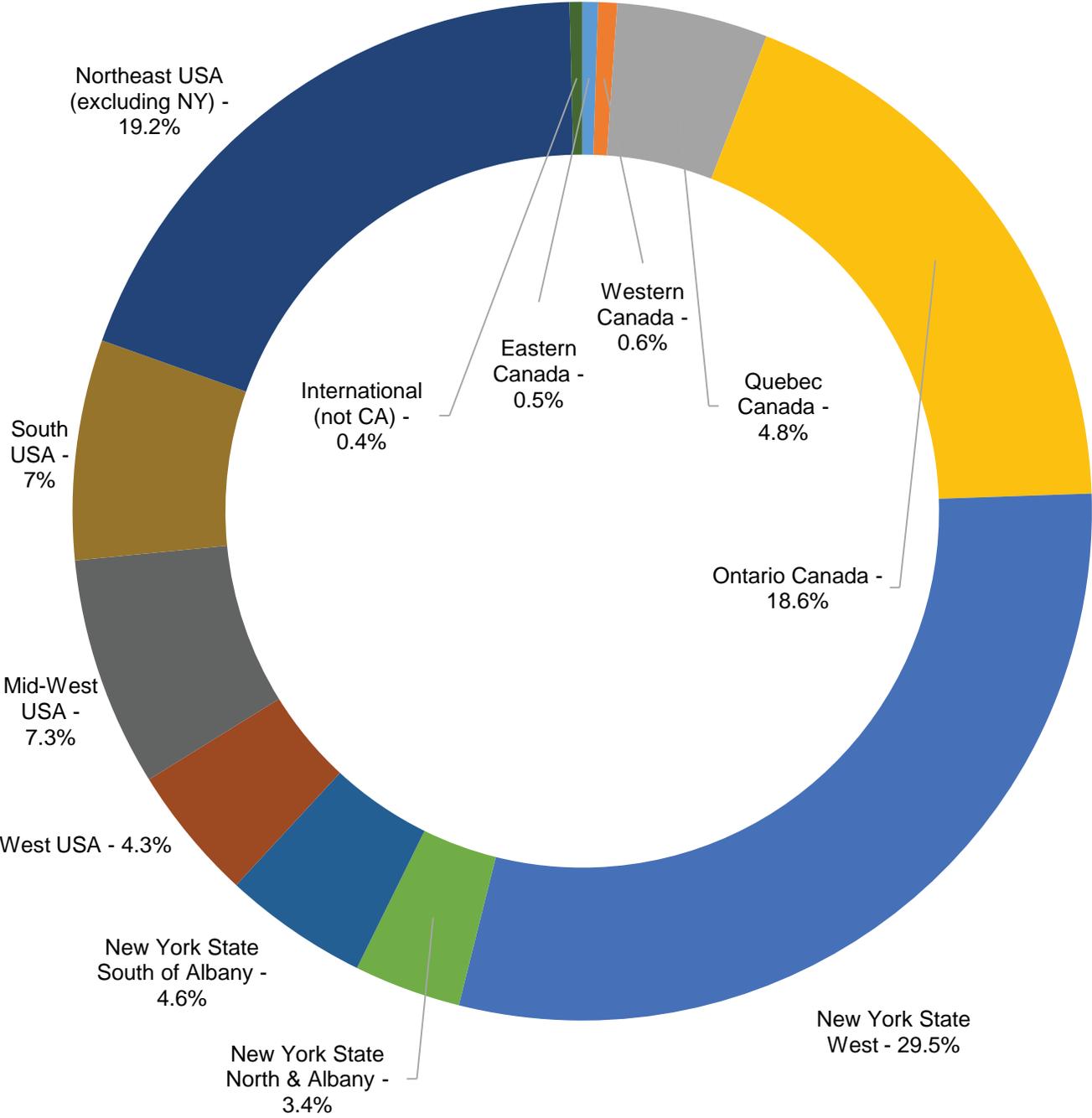
AREA OF RESIDENCE

Electronic survey respondents were requested to provide their zip or postal code of residence, within generalized regions of residence provided in Figure 1 on right.

In this breakout, the "Northeast" includes the Mid-Atlantic and New England states (except New York State), the "South" includes Southeastern and Southwestern states, the "West" includes the Rocky Mountain and Pacific states, and the "Mid-West" includes the Plains states and from Ohio to Missouri north to the Canadian border.

Almost forty percent (38%) of reported visitors came from New York State, with western New York comprising by far the largest in-state visitor group (30%). Almost twenty percent of visitors came from Northeastern states outside of New York and from Ontario (19% each). Total reported Canadian visitation is an impressive 25%. Secondly strong visitor groups include mid-western and southern U.S visitors with approximately 7% of reported visitation. These frequent visitor areas parallel Council advertising placement concentrations.

Figure 1: Areas of Residences by Zip/Postal Code Analysis

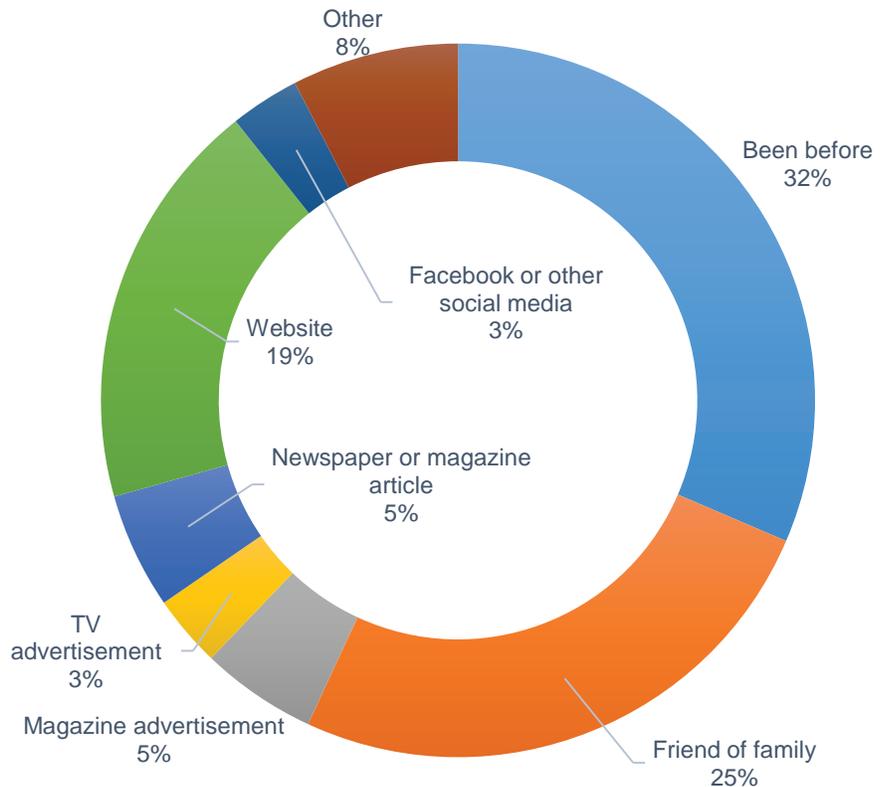


INFLUENCES TO VISIT THE REGION

Electronic survey respondents were asked what inspired their decision to visit the region in 2014/15. Multiple selections were permitted. Figure 2 below depicts the responses to this question from among all respondents.

Not surprisingly given the number of reported repeat visitors, this factor (repeat visitation) is the leading reported influence for visitors to the region, followed closely by friends or family. This is an important factor as it implies the positive experiences had by most visitors to the region as they choose to return, in many instances, repeatedly. The 1000 Islands International Tourism Council (or related) website(s) is (are) a strong secondary factor.

Figure 2: What inspired interest to visit



REGIONAL ATTRACTIONS

Overall Attractions

Survey respondents were asked to select the activities which attracted them to the 1000 Islands region from a provided list. Respondents were given the opportunity to list "other" draws to the region which were not listed and multiple responses were permitted. Figure 3 on the next page depicts responses from electronic survey respondents.

Scenic boat rides, visits to Boldt Castle and shopping dominate reported visitor experiences, with more than half of respondents selecting these experiences. Visits to State Parks, wineries or distilleries, the Antique Boat museum, fishing or boating and lighthouse visits are also strong, with more than one-quarter of respondents selecting these experiences.

Figure 4 on the next page depicts responses from intercept survey respondents, with notable differences in some areas.

Visitors were much more likely to provide details on "other" experiences in the face-to-face survey format, with nearly half (42%) providing such details. Intercept survey visitors reported scenic boat tours and concerts or ticketed events as the most popular attractions, with more than one-third selecting visiting a

winery or distillery, visiting Boldt Castle, and fishing, boating/paddling.

The differences in the reported attractions visited between the larger electronic survey

respondent group and the intercept survey is notable. Some variances may be explained by where the intercept surveys occurred, such as in proximity to ticketed events. Other differences such as a much

lower likelihood of intercept survey respondents to shop (one of top three interests among the larger survey) may be worth further exploration.

Figure 3. Attractions Visited- Electronic Survey Respondents

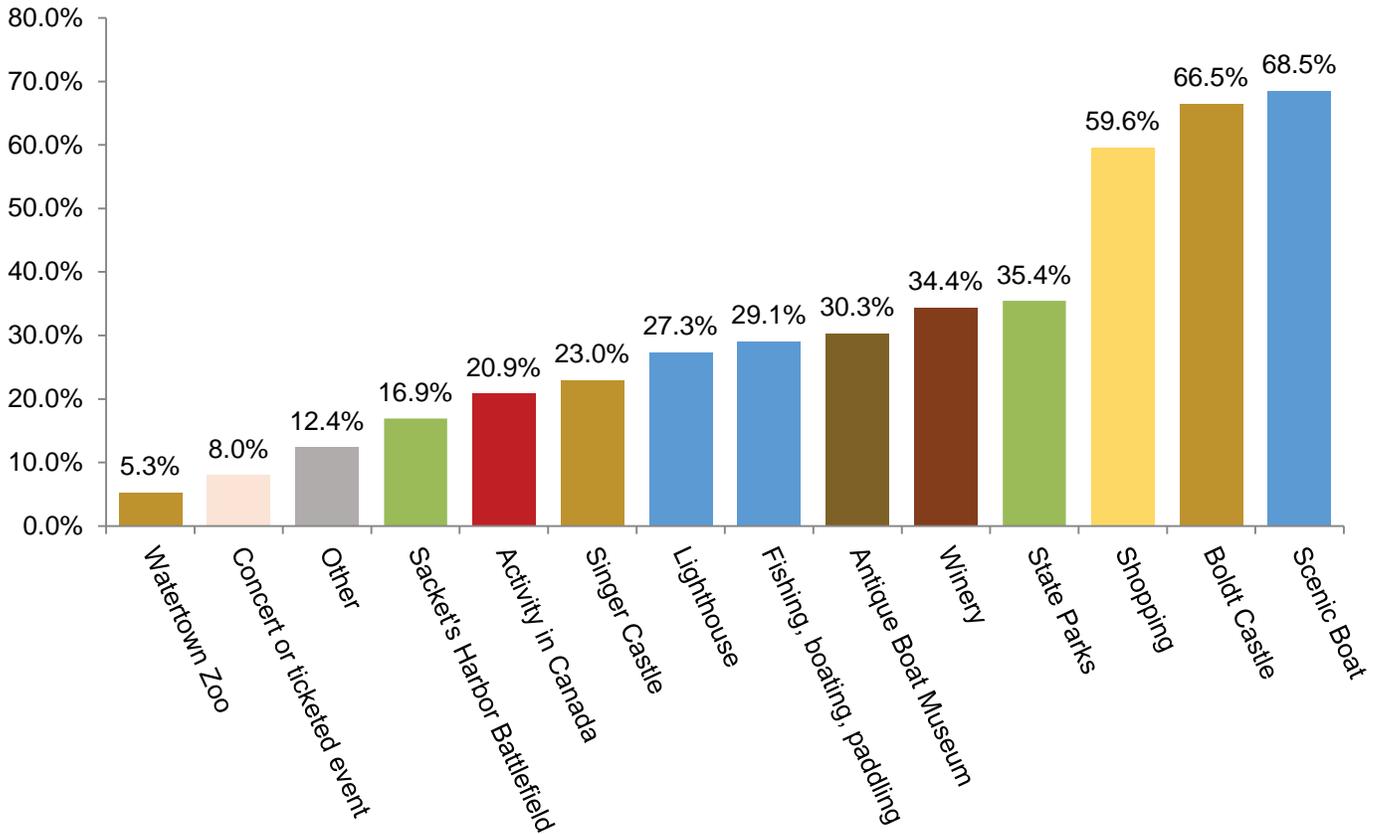
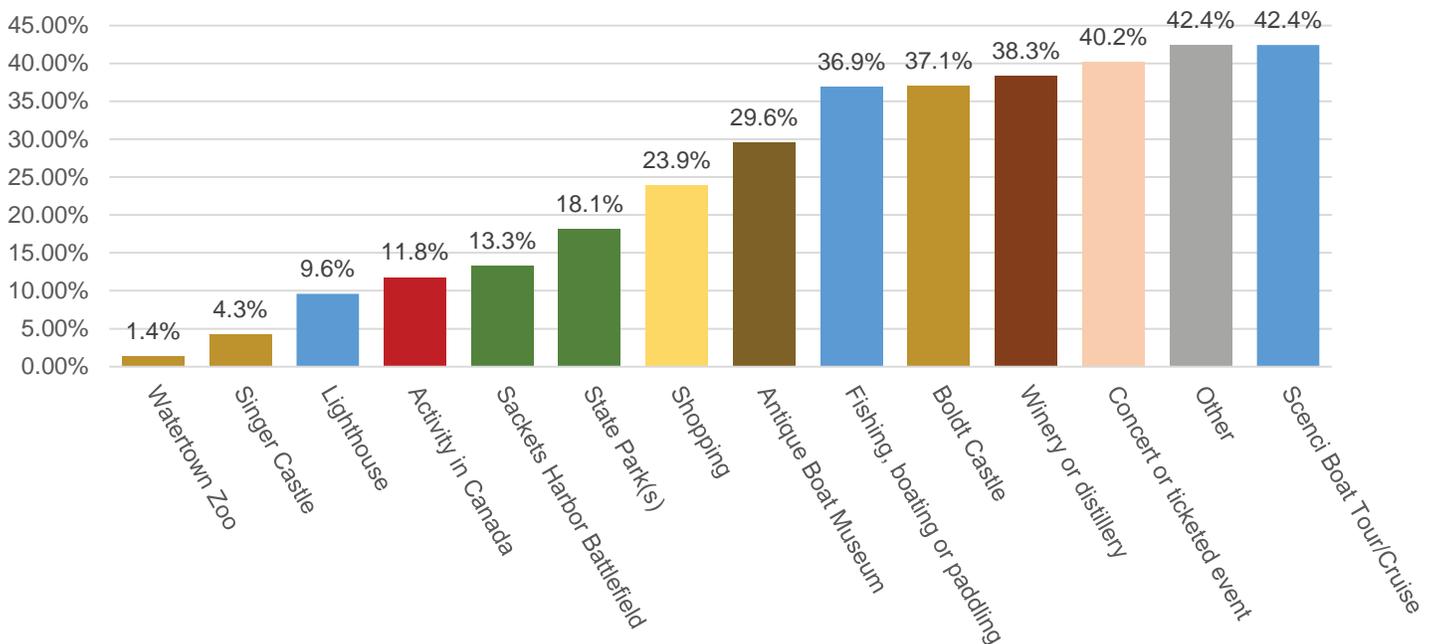


Figure 4. Attractions Visited- Intercept Survey Respondents

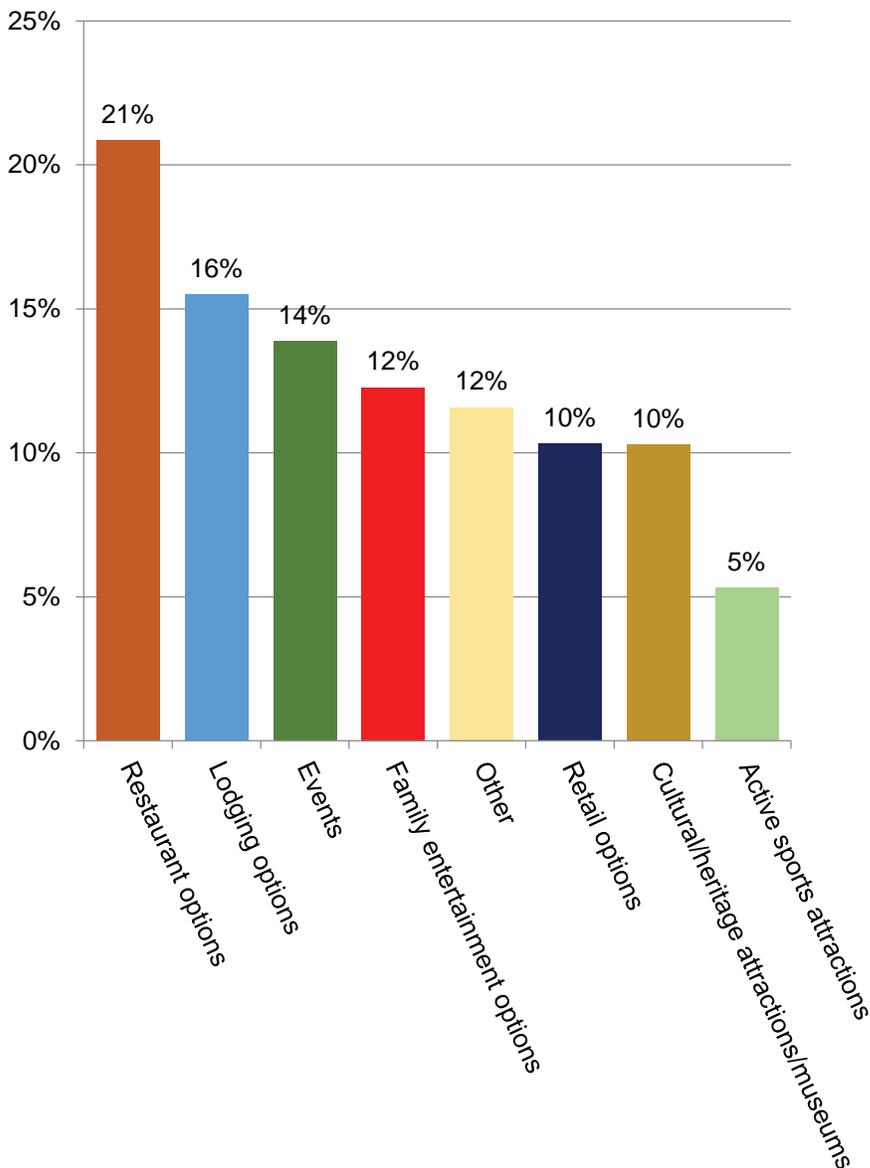


GAPS IN ATTRACTIONS

Survey respondents were asked what types of attractions or amenities they might have thought would enhance their visit enough to extend their length of stay. Figure 5 depicts the results of this question.

Restaurant options lead the list in reportedly missing facilities to entice visitors to stay longer in the region, followed by lodging options. The remaining categories all received nearly equal response in popularity, showing some need as well for additional events, family entertainment, retail options and cultural/heritage sites. The emphasis in tourism infrastructure that might be needed from this analysis however is on more restaurant and lodging options.

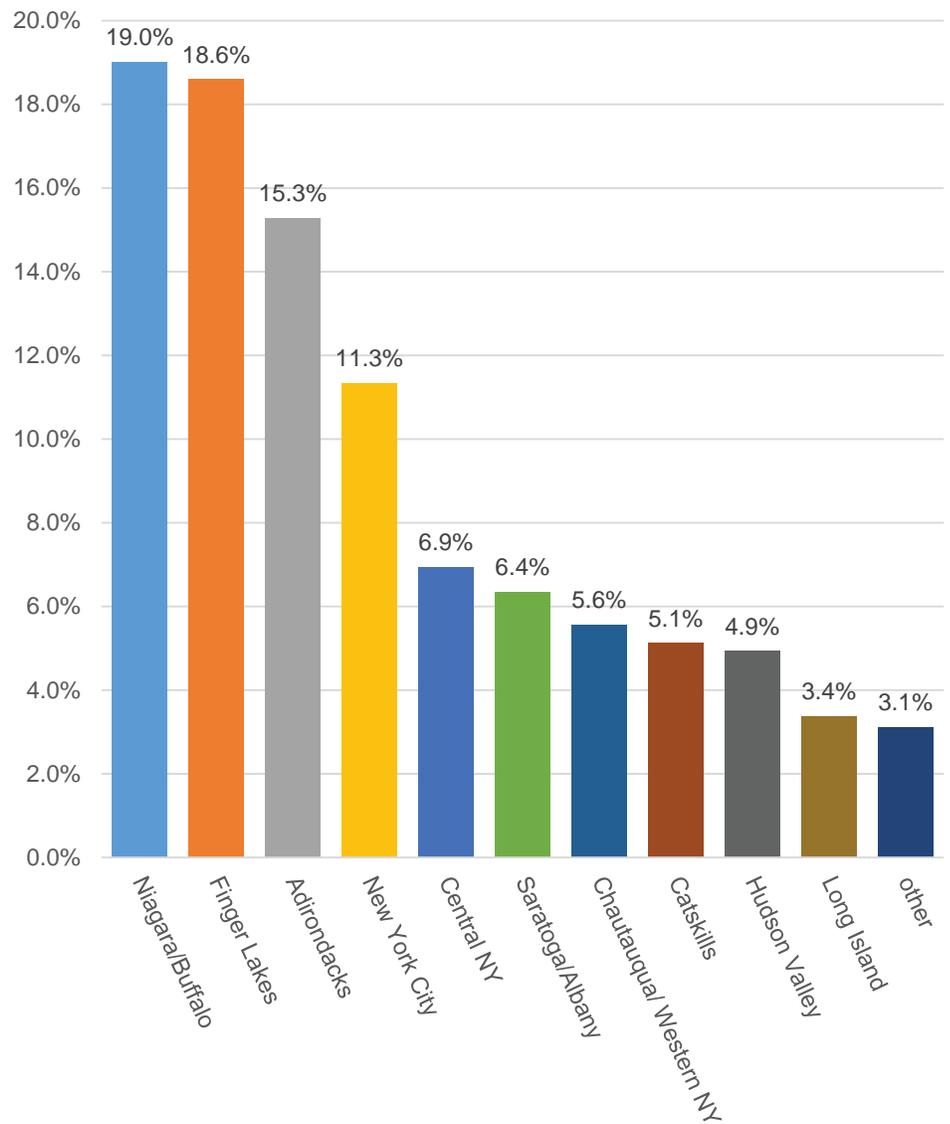
Figure 5. Attractions/Amenities Identified as Missing in Region



OTHER DESTINATIONS VISITED

Survey respondents were also asked where else in New York they had visited during the travel year of 2014/15. Figure 6 depicts these results. Western New York State locations (Niagara Falls/Buffalo) and the Finger Lakes dominate the list of other destinations. The Adirondacks and New York City comprise secondary alternative destinations.

Figure 6. Other NYS Areas Visited in 2014/15

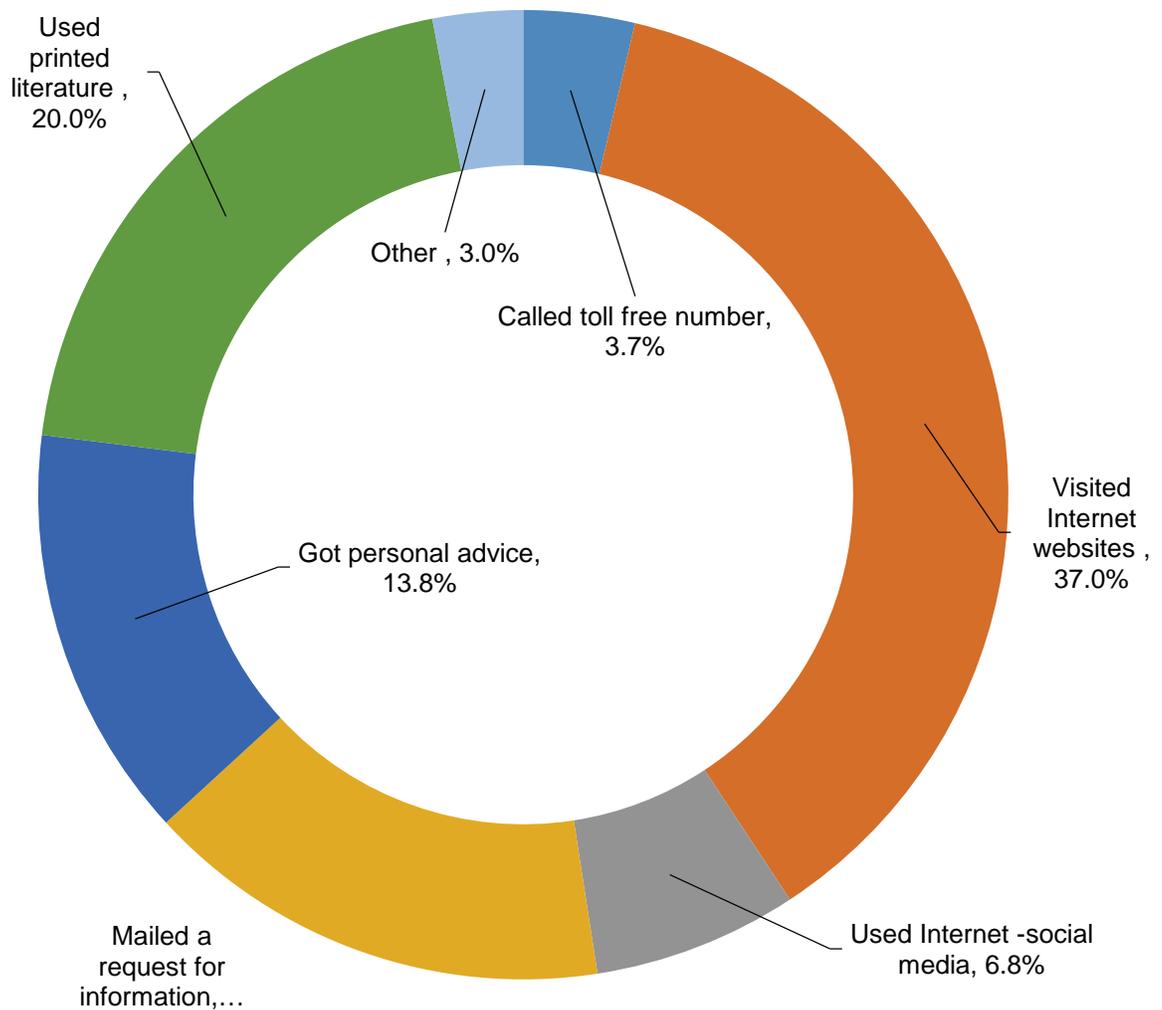


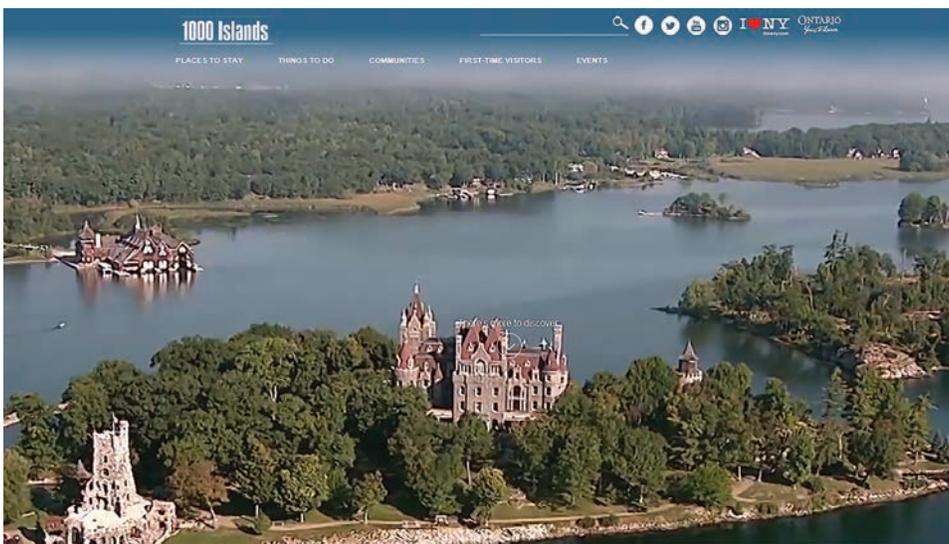
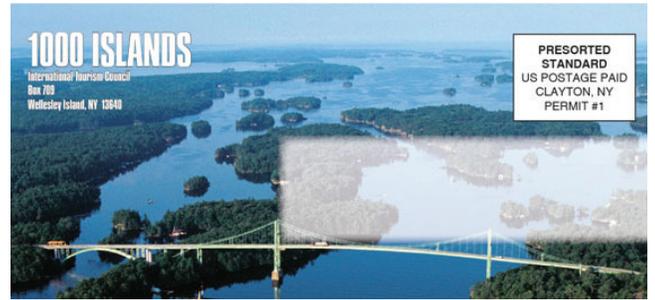
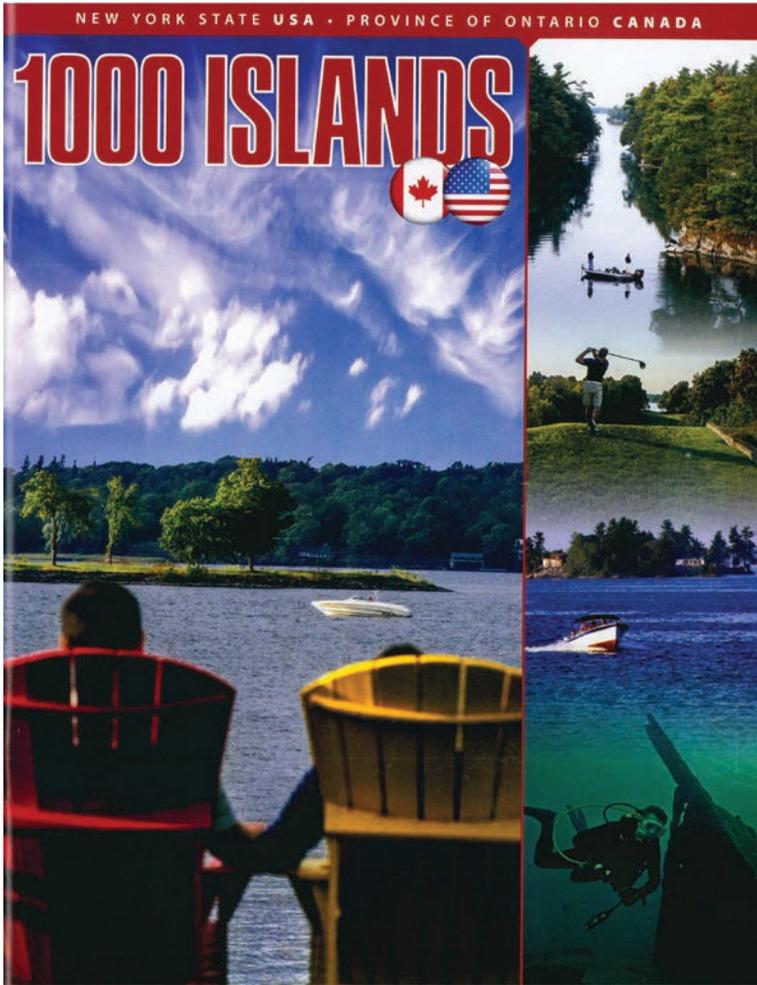
SOURCES OF TRAVEL INFORMATION USED

The Tourism Council offers a full complement of travel information for visitors from website-based information, printed materials, social media and toll-free phone numbers. Survey respondents were asked how they made their travel plans with multiple responses permitted. Results are provided in Figure 7 below.

Internet websites were the dominant information source for 2014-15 visitors, supplemented by another 7% who used internet-based social media for travel information. Printed literature and mailed information were the next most commonly reported sources of information.

Figure 7. Travel Information Sources





Visitor Guides
View 1000 Islands visitor brochures online or request a copy. [Learn More.](#)

Stay Informed
Join our mailing list for news and updates about the 1000 Islands. [Sign Up.](#)



A destination that visitors come to again and again.

The 1000 Islands is a sightseer's paradise and a popular destination for those looking for an authentic outdoor vacation. Located along the peaceful border between Northern New York State (United States) and Southeastern

1000 ISLANDS I ♥ NY
Lighthouses, Castles & Battlefields

Discover the rich heritage of the St. Lawrence River and Lake Ontario coastal region. Tour magnificent gilded age Boldt and Singer Castles. Explore the Antique Boat Museum, Rock Island Lighthouse and Tibbetts Point Lighthouse. Visit Sackets Harbor Battlefield.

New York State's Scenic & Historic North Coast

VISIT1000ISLANDS.COM

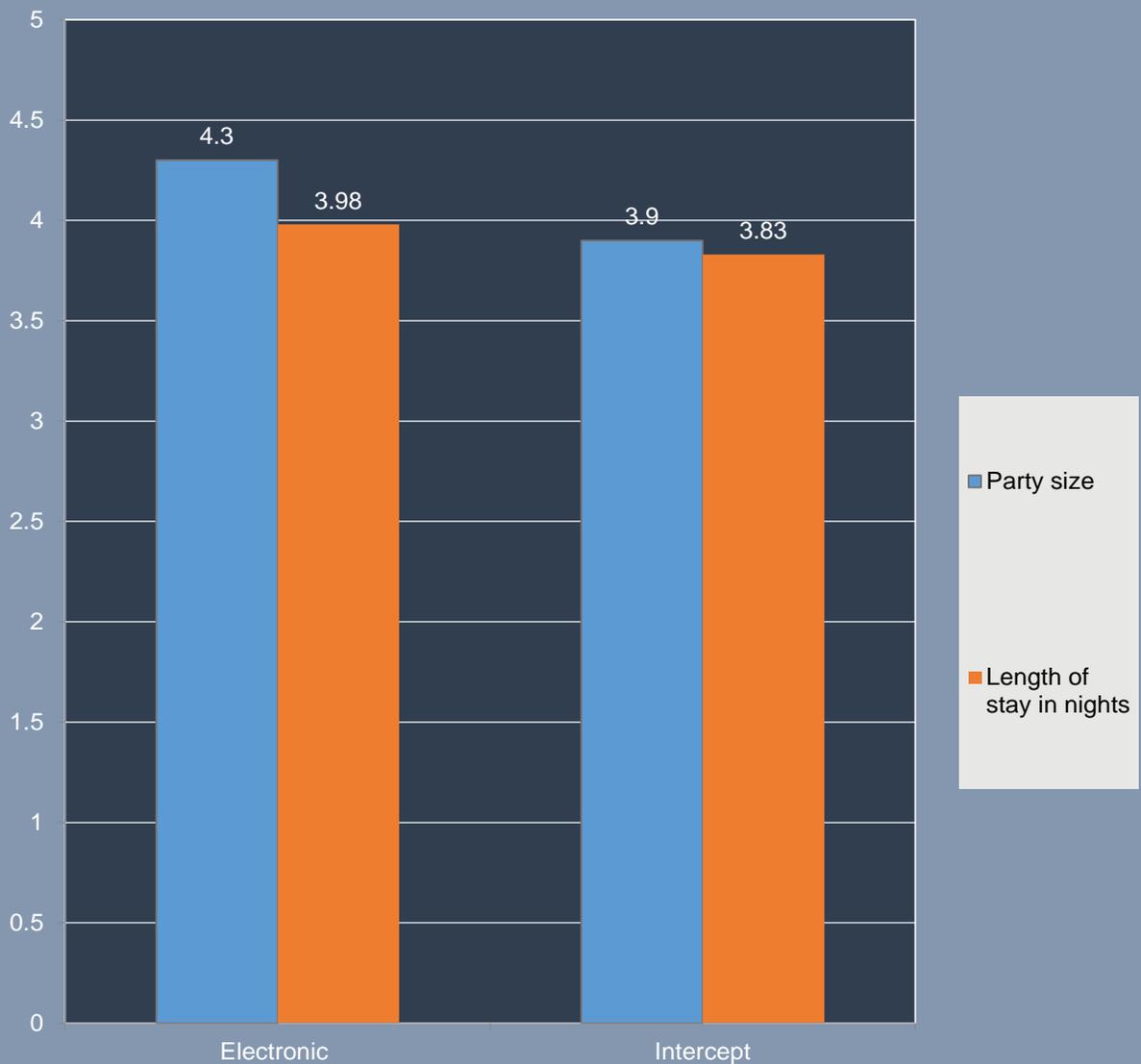
VISIT DURATION, PARTY SIZE

Survey respondents were requested to report the length of their most recent visit to the region and the size and composition of their most recent visitor party. Figure 8 provides a summary of these two factors for both surveys.

The mean reported visitor party size for the electronic survey is 4.3 persons, including 3 adults and 1.3 children. The mean reported visitor party size for the intercept survey is slightly lower at 3.9 persons, including 2.3 adults and 1.7 children.

The average reported stay for 2014/15 visitors was nearly 4 nights (3.98 nights) for electronic survey respondents. The mean reported stay for intercept survey respondents is also just below 4 nights (3.83 nights). A daytrip is considered zero nights stayed.

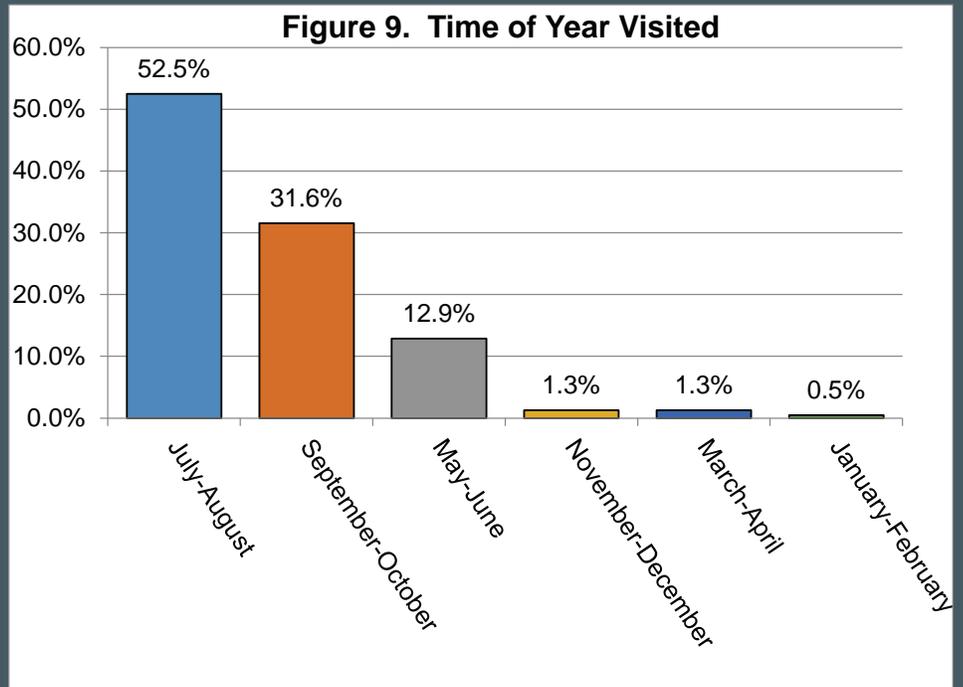
Figure 8. Average Party Sizes and Visit Duration



SEASON OF VISIT

Electronic survey respondents were asked about the timing of their visit(s) to the region during 2014/15. Multiple responses were permitted. Figure 9 below depicts the responses.

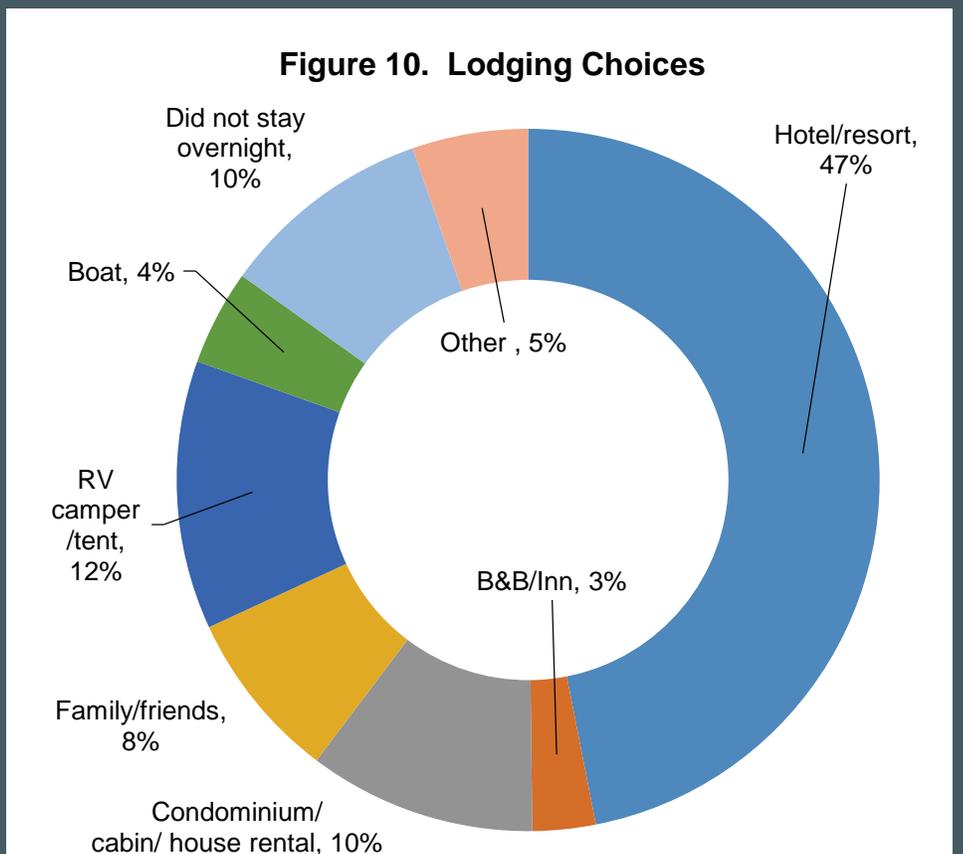
Not surprisingly the season is dominated by summer visitation (at nearly 53%). Fall visitation is the second most popular season (32%), followed by spring/early summer (May and June- 13%).



LODGING SELECTIONS

Visitor respondents to the electronic survey were asked what type of lodging they used during their stay in the 1000 Islands. Figure 10 depicts the lodging choices that they reported using. Multiple responses were permitted.

Hotels are by far, the most popular lodging choice, comprising nearly half (47%) of reported lodging choices. The next most common selection is RV or other camping at 12% followed by private house or cabin rentals at 10%. Few visitors reported staying with family or friends or on their boats (12% total). This is a positive contributor to visitor expenditure levels in the region.



LEISURE VISITOR SPENDING

The survey asked 2014/15 visitors to record their levels of spending across by category in their most recent trip to the 1000 Islands region. Table 1 below provides a summary of these results for total trip spending as well as average daily spending per visitor group (tabulated using the average of 3.98 nights stayed in region). These figures include visitors to both Canadian and U.S sites or U.S visitors only, but extracted the relatively small population of respondents who reported visiting only Canadian sites in the 1000 Islands region.

The data in the table below, and used for following analysis, is inclusive only of electronic survey respondents given the more careful methodology used in this sampling.

Not surprisingly, lodging and meals comprise the strongest parts of reported expenditures. The high reported expenditures in the “other” category provides an area that may be useful to explore in future research.

The roughly 15% of visitors who reported staying in Canada only during their trip reported expenditures per day approximately 10% lower than U.S. (at least in part) visitors.

Intercept survey respondents reported slightly lower spending levels, at \$313 daily or \$1,198 per average length trip. The intercept survey collapsed the “entertainment” and “other” spending categories into one collection; this should be taken into account when comparing figures. The largest reported difference among electronic survey respondents and intercept survey respondents was in lodging expenditures. These were reported on average \$144 higher among electronic survey respondents. Meal and shopping spending, however, were reported as slightly higher among intercept survey respondents.

Table 1. Estimated Spending per Party per Day for 2014/15 Leisure Travel

Category	\$ Amount Estimated Spending per party, per Trip	\$ Amount Estimated Spending per party, per Day (categories rounded to nearest dollar)
Lodging	\$459	\$115
Meals	\$252	\$63
Shopping	\$146	\$37
Entertainment	\$106	\$27
Attractions/Events	\$119	\$30
Transportation	\$146	\$36
Other expenses	\$154	\$39
Total Expenses:	\$1,382 per trip	\$346 per day

CONVERSION MEASUREMENT

Motivational Influence of Travel Materials

The electronic survey asked respondents to indicate whether the material they viewed either influenced or reinforced their motivation to travel to the area. This provides an industry standard method by which to measure influence of marketing materials on “conversion” of a possible traveler to an actual traveler.

For instance, the highly-regarded Travel Michigan Research Study¹ uses conversion to recognize inquiry and subsequent fulfillment by the marketing agency as the final measure of motivation to travel. Tourism advertising research distinguishes between two effects when measuring impacts: advertising that leads to inquiry and fulfillment and advertising that leads to inquiry and purchase. Inquiry/fulfillment involves the customer’s response to acquire information and inquiry/purchase involves the customers who ask for information and purchase the product.

This survey measured the conversion rate of potential travelers (using direct, traceable leads provided by the Council) who viewed regional travel information, to those who actually traveled to Jefferson County. This was done by asking respondents to characterize the influence of the travel information they received

in the following categories: “helped me decide to take a trip not previously planned”, “reinforced plans to visit the region”, “was not helpful”, or “helped me decide not to visit the region”.

Figure 11 below demonstrates information with regard to inquiry/fulfillment, with a majority of respondents indicating a positive impact of information received. A strong connection of inquiry/purchase results is implied by this information, but cannot be completely validated as would be possible through an on-site intercept survey.

Eighty-seven percent (87%) of respondents stated that the information or advertisements viewed either reinforced plans for a trip, or helped convince them to take a trip not yet

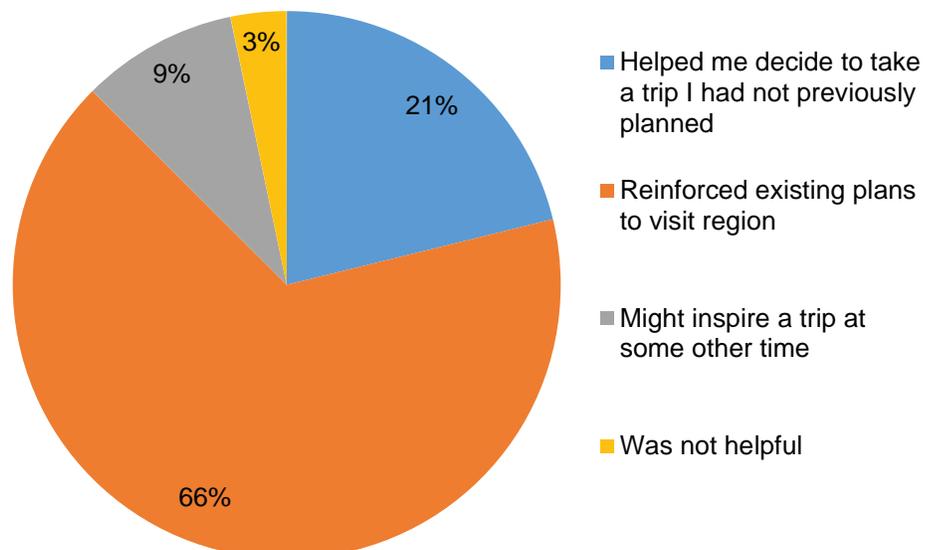
planned. This is the gross conversion rate of travelers to the area.

The gross conversion rate is used for quantitative analysis within the subsequent sections of this report, in order to calculate estimated visitation based on traceable leads, and thus a ROI on marketing investment.

The net conversion rate includes only those travelers who replied that the information viewed helped them decide to make a trip not yet planned to the region.

This net conversion rate is twenty-one percent (21%). The net conversion rate can be used as a much more conservative quantitative measure of return.

Figure 11. Influence of Marketing Materials on Decision



RETURN ON MARKETING INVESTMENT AND ANALYSIS

Marketing Costs per Visitor

Dividing the marketing costs for the region in the specified period, by the number of visitors to the region, results in estimated marketing expenditures per visitor.

The 2014/15 season estimated visitor count to the 1000 Islands region is tabulated by multiplying the number of leads generated by the Tourism Council (those who contacted the office during 2014/15 for information) by the conversion factor and by the average party size (determined by this survey).

- $34,363$ (direct leads) \times 87% (gross conversion factor) \times 4.3 (average party size)
- $128,552$ = estimated visitors in 2014/15 season

The number of visitors likely influenced by the Council to visit the 1000 Islands in the 2014/15 tourism season is estimated at 128,552.

In this same year, the Tourism Council spent \$659,270 in marketing dollars for tourism marketing purposes. This yields an estimated \$5.12 marketing cost per visitor based on marketing expenditures (\$659,270/128,522). This demonstrates significant efficiencies in reaching these visitors based on studies conducted in similar upstate NY regions.

Return on Investment

Return on investment (ROI) is measured by estimated expenditures generated by visitors divided by the total marketing dollars spent (from marketing dollars). For this purpose, the small portion of visitors within the sample who visited Canada only were excluded.

The first step in this process is to estimate total revenue generated by leisure visitors to the region by multiplying the number of traceable inquiries by the average gross conversion rate, daily visitor expenditures and length of stay:

- $34,363$ (number of direct, traceable inquiries) \times 87% (gross conversion factor) \times \$347 (mean visitor party expenditure per day) \times 3.98 (mean length of stay in nights)
- = \$41,287,907 (total estimated revenue generated by visitors in 2014/15 season)

The second step in this process is to divide the total revenue generated by visitors by the total marketing dollars spent:

- $\$41,287,907$ (total estimated visitor revenue) / $\$659,270$ (total marketing expenditures spent through occupancy tax dollars)
- Return on Investment (ROI) = 63:1

The above calculations show that the total estimated revenue generated by visitors was over \$41 million in 2014/15. This produces an estimated ROI of \$63 in leisure visitor-related revenue for each marketing dollar expended. This demonstrates a high level of return per marketing expenditures for reaching leisure visitors, compared to other similar regions.



CONCLUSIONS

A few major findings about 1000 Islands region visitation may be concluded from the two surveys employed in 2015 to research visitor data from the 2014/15 travel season. The strong majority of visitors are repeat travelers to the area, with many having visited on many occasions. This documents positive visitor experiences. Another indicator of a strong visitor base is the large majority who stay overnight in the area, most for at least several nights.

A known challenge is the fact that just over half of visitors reported peak summer visits. Expanding visitation beyond the traditional summer months would greatly increase visitor impacts to the region. The Council has targeted expanded fall visitation, of which promise may be seen in comparison to visitation of the other shoulder season, spring.

The electronic survey provided extremely high rates of reported visitation to several key tourist sites and high visitation to five others. The concentration of interest in less than ten sites or activities presents both an opportunity (focus in market share and of resources) and a challenge (somewhat limiting on visit and length of visit).

The differing visitation characteristics noted between the two surveys might be useful to further explore in the future. Expenditures (spending impacts) levels, however, are strong and consistent with other upstate New York counties. The estimated return on investment to marketing dollars expended is strong and demonstrates efficiencies in these marketing decisions. To harness the expected continued growth in domestic and international

travel, the region should continue to explore manners by which to improve attractions or amenities identified as missing by visitors, and to explore further encouraging or incentivizing off-peak travel.



APPENDIX: SURVEY RESULTS DATA

Electronic Survey Data	
Question/Response	Total

Did you travel to the Thousand Islands in 2014-15?
3,408 responses

Yes	48%
No	52%

How many in your travel party?
1,460 respondents

Adults	3.02
Children	1.29
	4.31

Is this your first visit?
1,525 responses

Yes	40%
No	60%

How many leisure trips here in last 5 years (repeat range)
750 responses

range	1 to 100
average	12

Average nights stayed	3.98
Number (%) day trips	180 (12%)

Expenses/Day/Party-All visitors
1,190 respondents

Lodging	\$459
Meals	\$252
Shopping	\$146
Entertainment	\$106
Attractions/Events	\$119
Transportation	\$146
Other	\$154
<i>Total Trip</i>	\$ 1,382.00
<i>Total Daily</i>	\$ 347.24

Expenses/Party-US only
906 responses

Lodging	\$492
Meals	\$265
Shopping	\$156
Entertainment	\$110
Attractions/Events	\$120
Transportation	\$142
Other	\$166
<i>Total Daily</i>	\$ 1,451.00
<i>Total Trip</i>	\$ 364.57

Intercept Survey Data	
Question/Response	Total

Did you travel to the Thousand Islands in 2014-15?
NA

How many in your travel party?
415 responses

Adults	2.26
Children	1.67
	3.93

Is this your first visit?
403 responses

Yes	33%
No	67%

How many leisure trips here in last 5 years (repeat range)
186 responses

range	1 to 90
average	5

Average nights stayed	3.83
Number (%) day trips	11 (3%)

Expenses/ Party- All Visitors
295 respondents

Lodging	\$315
Meals	\$276
Shopping	\$156
Entertainment	NA
Attractions/Events	\$185
Transportation	\$148
Other/Entertainment	\$118
<i>Total Trip</i>	\$ 1,198.00
<i>Total Daily</i>	\$ 312.79

Expenses/Party-US only
NA

Electronic Survey Data

Question/Response **Total**

Lodging choices

1,480 responses

Hotel/resort	47%
B&B/Inn	3%
Condominium/cabin/ house rental	10%
Family/friends	8%
RV camper/tent	12%
Boat	4%
Did not stay overnight	10%
Other (please specify)	5%

Time of Year Visited

1,476 responses

July-August	53%
September-October	32%
November-December	1%
January-February	0%
March-April	1%
May-June	13%

What activities did you include

1,270 respondents

Scenic boat tour	69%
Shopping	60%
Boldt Castle	67%
State parks	35%
Winery	34%
Singer Castle	23%
Antique Boat museum	30%
Watertown Zoo	1%
Sacket's Habor Battlefied	2%
Lighthouse	27%
Fishing, boating, paddling	29%
Concert or ticketed event	8%
Activity in Canada	21%
Other	12%

Other areas visited

2,754 responses

Adirondacks	15%
Catskills	5%
Central NY	7%
Chautauqua/ western NY	6%
Finger Lakes	19%
Hudson Valley	5%
Long Island	3%
New York City	11%
Niagara/Buffalo	19%
Saratoga/Albany	6%
other	3%

Intercept Survey Data

Question/Response **Total**

Lodging choices

349 responses

Hotel/resort	18%
B&B/Inn	3%
Condominium/cabin/ house rental	8%
Family/friends	23%
RV camper/tent	17%
Boat	0%
Did not stay overnight	0%
Other (please specify)	11%

Time of Year Visited

NA

What activities did you include

414 respondents

Scenic boat tour	42%
Shopping	24%
Boldt Castle	37%
State parks	18%
Winery	38%
Singer Castle	4%
Antique Boat museum	30%
Watertown Zoo	2%
Sacket's Habor Battlefied	13%
Lighthouse	10%
Fishing, boating, paddling	37%
Concert or ticketed event	40%
Activity in Canada	12%
Other	42%

Other areas visited

NA

Electronic Survey Data

Question/Response **Total**

Level of influence of information

1,480 responses

Helped me decide to take a trip I had not previously planned	21.10%
Reinforced existing plans to visit region	66.30%
Might inspire a trip at some other time	9.20%
Was not helpful	3.30%

How did you research your travel plans

3,345 responses

Called toll free number	3.70%
Visited Internet websites	37.00%
Used Internet social media .)	6.80%
Mailed a request for information	15.60%
Got personal advice	13.80%
Used printed literature	20.00%
Other (please specify)	3.00%

What inspired interest

2,613 responses

Been before	31.40%
Friend or family	25.40%
Magazine advertisement	5.20%
TV advertisement	3.20%
Newspaper or magazine article	5.20%
Website	18.60%
Facebook or other social media	3.10%
Other (please specify)	7.50%

What facilities are missing

3,128 responses

Lodging options	15.50%
Restaurant options	20.80%
Retail options	10.30%
Events	13.90%
Active sports attractions	5.30%
Cultural/heritage attractions or muse	10.30%
Family entertainment options	12.30%
Other (please specify)	11.60%

Median Age 57
Mean Age 57
Median Annual Household Income (People) \$70,000

Intercept Survey Data

Question/Response **Total**

Level of influence of information

NA

How did you research your travel plans

NA

What inspired interest

NA

What facilities are missing

NA (open-ended)

Median Age 51
Mean Age 53
Median Annual Household Income (People) \$70,000

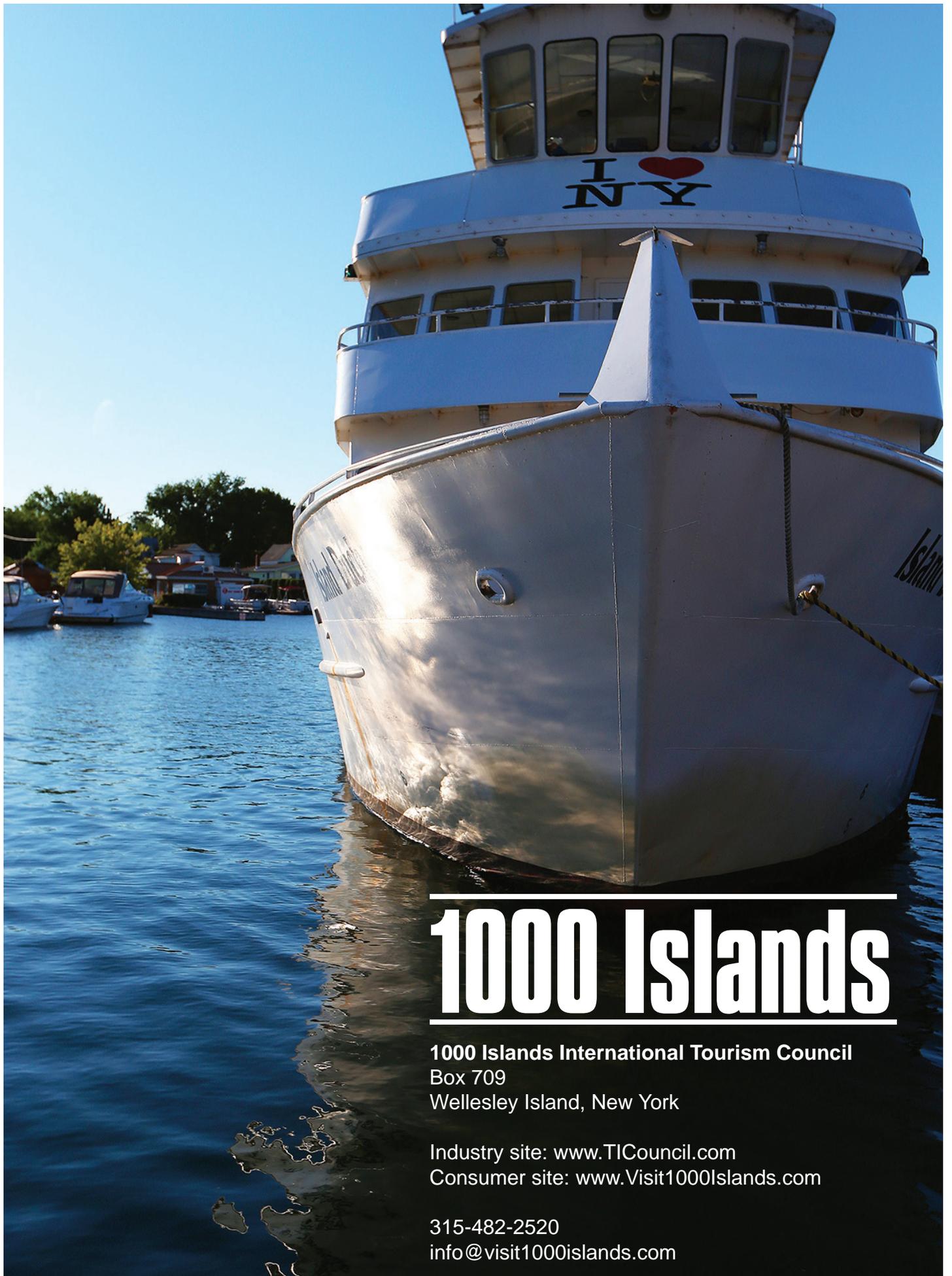
To: Gary DeYoung, 1000 Islands International Tourism Council
From: Victoria Zinser Duley and John Parmelee, PlaceMaking
Date: February 11, 2016
Subject: Visitor Spending Comparables

The daily and total trip expenditures tabulated through our research for 2014/15 season visitors show comparable results to other tourist destinations in upstate New York.

The table below depicts leisure visitor expenditures as presented by each county within recent years, in comparison with the 1000 Islands data:

Daily per Party Visitor Spending (\$)	1000 Islands (2016)	Cayuga County (2011)	Clinton County (2013)	Essex County (2015)
Lodging	\$108	\$111	\$101	\$138
Meals	\$101	\$76	\$61	\$69
Attractions/Entertainment	\$61	\$29	\$35	\$33
Transportation	\$60	\$28	\$60	\$37
Shopping	\$37	\$216	\$108	\$34
Other	\$39	NA	\$38	\$12
Total daily estimated spending	\$346	\$387	\$403	\$323
Total estimated trip spending (based on average reported length of stay)	\$1,382	NA (information not available)	\$1,453	\$1,329

The spending levels estimated for 1000 Islands visitors during 2014/15 fall roughly in the middle of these areas. Meal and attraction expenditures are measurably higher than among these other regions. This is consistent with the findings of high levels of visitors who attended ticketed events (particularly among intercept survey respondents), as well as the high level of interest expressed in expanded regional restaurant offerings. The overall proportion of expenditures by 1000 Islands visitors are consistent with statewide averages provided by the NYS Economic Development Department.



1000 Islands

1000 Islands International Tourism Council
Box 709
Wellesley Island, New York

Industry site: www.TICouncil.com
Consumer site: www.Visit1000Islands.com

315-482-2520
info@visit1000islands.com