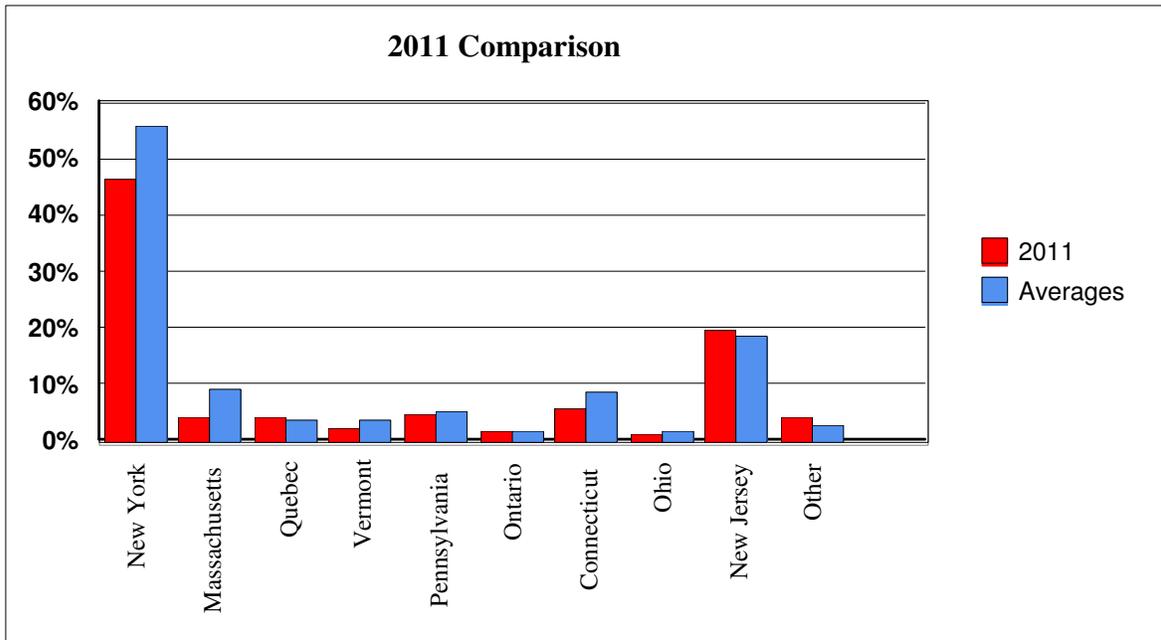


2011 WARREN COUNTY OCCUPANCY SURVEY AND REPORT



Origin of Visitors to the Lake George Area

**A COOPERATIVE VENTURE BETWEEN
THE WARREN COUNTY DEPARTMENTS
OF PLANNING AND TOURISM**

Table of Contents

Staff Notes	1
Determination of Seasonal Population	2
Camping Facilities	4
Visitor Population	4
Origin of Visitors	5
Observations	7
Comparison Chart	8

Tables

<i>Table 1</i>	<i>Visitors by Community</i>	2
<i>Table 2</i>	<i>2010-2011 Utilization Comparison</i>	3
<i>Table 3</i>	<i>Seasonal Adjustments</i>	3
<i>Table 4</i>	<i>Camping Population Tabulations</i>	4
<i>Table 5</i>	<i>2011 Origin of Visitors</i>	5
<i>Table 6</i>	<i>Historical Origin of Visitors Survey Values</i>	6
<i>Table 8</i>	<i>Comparison With Previous Surveys 1994 - Present</i>	8

**Staff Notes Relative to The Occupancy Survey Conducted by
The Warren County Tourism Department and The Planning Department**

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

Specific questions regarding analysis of data or analytical methods may be directed to the Planning Office, 518-761-6410.

Determination of Seasonal Population

The time period covered by this section is the 2011 calendar year. Using the 2011 Warren County Travel Guide, it was determined that there are 9,683 rooms available within the County for non-resident lodging use. Results from the Accommodation Survey indicate that the average registration was 3.12 persons.

Table 1
Visitors by Community

	Responses	Total Rooms	Utilization Rate	Visitor Events
Bolton	6	800	28.19%	267,544
Chester	5	197	20.63%	35,604
Hague	1	426	23.53%	109,780
Horicon	1	30	24.00%	10,512
Johnsburg	3	367	22.24%	81,135
L Geo Town	6	4353	28.74%	1,015,834
L Geo Village	3	1977	22.51%	1,153,201
Lake Luzerne	2	226	26.41%	59,906
QBY	4	836	36.73%	364,225
Stony Creek	0	118	0.00%	0
Thurman	0	0	0.00%	0
Warrensburg	1	218	54.98%	87,501
Glens falls	1	135	0.00%	0
	33	9,683	26.18%	3,185,243

The process used to determine the non-resident lodging utilization within the County involves the use of survey responses which indicated that, County-wide, the occupancy rate for accommodations was 26.18% of the yearly capacity not adjusted for seasonal closures. Based on the preceding information, the yearly seasonal occupancy is computed to be 3,185,243 persons

Due to the dramatic seasonality associated with annual occupancy, it is important to factor in Seasonal Adjustments, page 3 (Table 3). Based on this seasonal adjustment, 2011 occupancy is 45.93%. A historical comparison of the years 2005 - present is included in Table 8.

For those communities that do not have any visitor events listed it is because either no surveys were provided or that the surveys provided were not completed in a manner that provided useful data.

The following table provides a comparison, by month, of occupancy rates for the 9,683 rooms available within Warren County.

Table 2
2010-2011 Utilization Comparison

Month	2011	2010	Difference
January	12.19%	9.14%	3.05%
February	17.35%	13.65%	3.70%
March	13.36%	9.10%	4.26%
April	9.49%	11.33%	-1.84%
May	21.04%	23.65%	-2.61%
June	37.09%	41.80%	-4.71%
July	65.74%	70.93%	-5.19%
August	67.61%	78.33%	-10.72%
September	32.95%	38.77%	-5.82%
October	24.85%	26.70%	-1.85%
November	8.47%	10.35%	-1.88%
December	8.77%	7.77%	1.00%

Estimated Occupancy Rates of rooms available for rent. Total room count is 9,683 per the 2011 Warren County travel guide. Of those rooms, only 3,496 or 36.10% are available on year round basis with the remainder being seasonally available.

Table 3
Seasonal Adjustments

Month	Survey Rate	Adjustment Value	Actual Occupancy rate of Available Rooms
January	12.19%	36.10%	33.77%
February	17.35%	36.10%	48.06%
March	13.36%	36.10%	37.01%
April	9.49%	36.10%	26.29%
May	21.04%	36.10%	58.28%
June	37.09%	100.00%	37.09%
July	65.74%	100.00%	65.74%
August	67.61%	100.00%	67.61%
September	32.95%	100.00%	32.95%
October	24.85%	100.00%	24.85%
November	8.47%	36.10%	23.46%
December	8.77%	36.10%	24.29%

Camping Facilities

Information from the 2011 Warren County Travel Guide indicates that there are 4,981 camping sites within the County included within 36 different facilities. These campgrounds are both public and private ownership and were provided a separate Occupancy Survey. Ten of the campgrounds responded to include 1,734 sites.

Table 4
Camping Population Tabulations

	Facilities	Sites	Occupancy Rates	Population
Bolton	3	455	5.04%	29,302
Chester	6	465	4.31%	25,625
Hague	2	382	4.39%	21,419
Horicon	3	127	4.39%	6,874
Johnsburg	0	0	0	0
L Geo Town	10	1717	10.77%	236,128
L Geo Village	0	0	0	0
Lake Luzerne	2	242	8.50%	24,401
QBY	3	748	27.60%	237,365
Stony Creek	2	90	12.25%	13,599
Thurman	0	0	0	0
Warrensburg	5	755	12.25%	114,080
Glens falls	0	0	0	0
				0
	36	4981		708,793

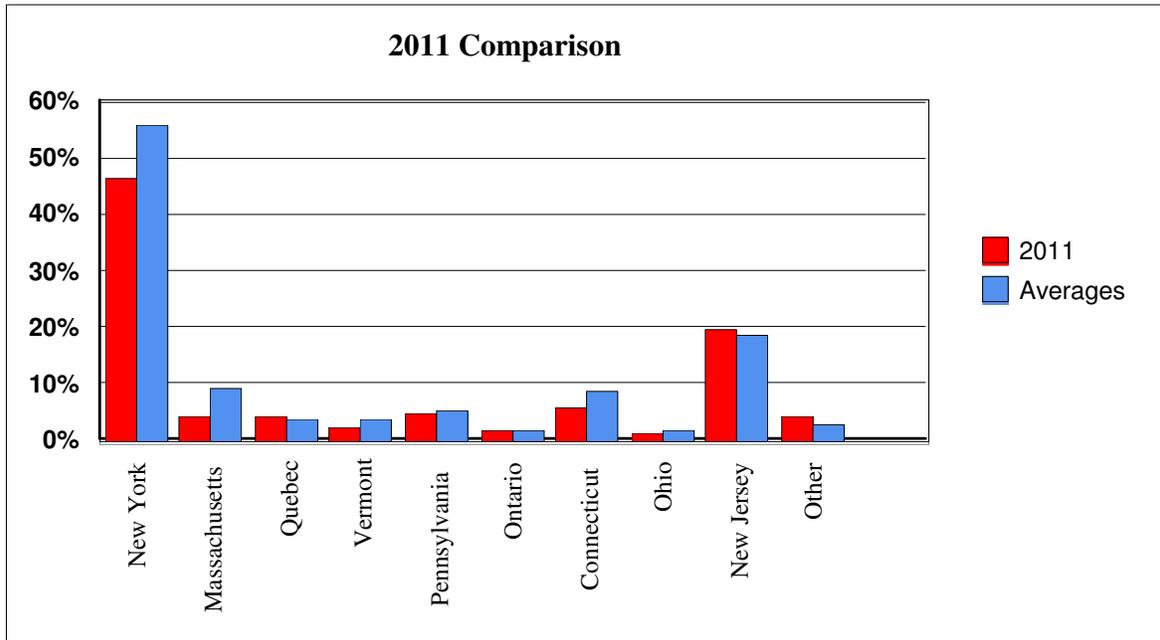
The average occupancy rate was 12.25% on an annualized basis with 3.38 persons per campground visit, staying for an average of 3.32 days. Using these figures, it is computed that the campground contribution to the seasonal population mix for 2011 was 708,793 persons.

Visitor Population

The campground population was estimated at 708,593 and the population of overnight guest events was estimated at 3,185,243. Using information provided by the Tourism Department and survey respondents, it is estimated that 50% of visitors to local attractions were overnight guests. Therefore, it is estimated that day trip visitors to Warren County numbered about 3,893,836. The total visitor events are calculated at 7,788,072.

Origins of Visitors

Information that was collected in 1995, and updated yearly since, pertains to the origin of visitors to the County who utilized some form of lodging facility. The accuracy of the information is only as good as the records kept by the facility owners. It is evident upon review of information that some figures provided are ball park figures and some are very accurate percentages. The following graph provides a pictorial representation of the points of origin for 2011 compared to the averages since the study was first initiated. Absolute values are provided in Table 6.



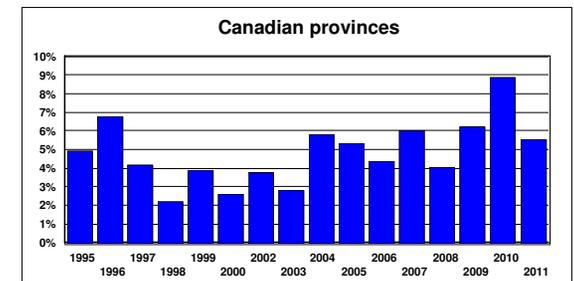
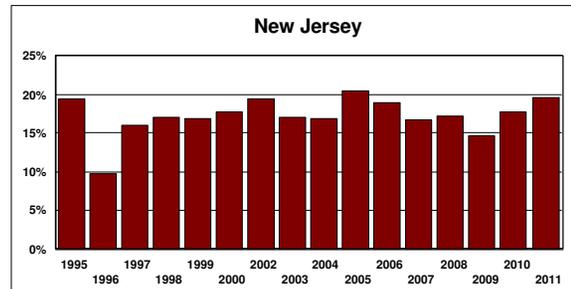
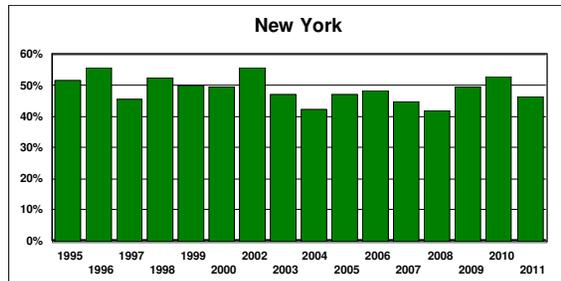
Origin of Visitors

Historical Patterns of Visitor Origin

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

Table 6
Historical Origin of Visitors Survey Values

	1995	1996	1997	1998	1999	2000	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	Average
NY	51.66%	55.68%	45.71%	52.31%	49.92%	49.57%	55.57%	47.21%	42.25%	47.20%	48.54%	44.80%	41.94%	49.39%	52.77%	46.52%	55.79%
MA	9.51%	9.58%	9.13%	9.76%	7.59%	7.61%	8.18%	5.77%	8.61%	7.86%	8.28%	9.47%	6.45%	6.63%	8.95%	4.32%	9.12%
Quebec	3.24%	5.47%	2.73%	1.38%	2.64%	1.57%	2.26%	1.47%	3.36%	3.85%	2.89%	3.99%	2.78%	4.04%	5.18%	3.97%	3.63%
VT	3.07%	4.19%	3.48%	3.32%	3.89%	3.02%	3.36%	2.88%	3.93%	3.85%	3.67%	3.96%	3.02%	3.04%	3.37%	2.16%	3.87%
PA	3.57%	2.04%	4.51%	4.99%	4.61%	4.32%	4.81%	4.04%	9.89%	3.99%	4.48%	5.27%	4.02%	3.09%	4.39%	4.67%	5.19%
Ontario	1.66%	1.29%	1.42%	0.81%	1.28%	1.03%	1.50%	1.36%	2.43%	1.46%	1.53%	2.01%	1.29%	2.16%	3.67%	1.58%	1.89%
CT	9.02%	6.21%	8.24%	8.86%	9.30%	6.81%	8.19%	7.33%	6.15%	7.71%	8.41%	8.58%	5.44%	5.91%	7.34%	5.69%	8.51%
OH	1.61%	0.03%	0.80%	1.39%	1.26%	1.05%	1.03%	0.87%	1.84%	1.30%	1.65%	1.16%	5.40%	0.54%	1.35%	1.02%	1.59%
NJ	19.42%	9.79%	16.05%	17.14%	16.97%	17.81%	19.45%	17.13%	16.96%	20.55%	18.99%	16.71%	17.33%	14.72%	17.84%	19.71%	19.76%
Other	2.04%	1.01%	2.45%	1.94%	2.89%	2.20%	1.05%	1.81%	4.80%	1.98%	2.49%	1.41%	0.27%	8.70%	0.00%	4.06%	2.79%



Observations

1. *As evidenced by the data, New York State has remained as a primary resource area to visitors to Warren County. The second largest resource area for visitors within the County is New Jersey at 19.71%.*
2. *The response rate of 11.52% of the lodging facilities is well below the 13 year average of 18.83%.*
3. *The average number of people per stay was 3.12. This number is consistent with the previous year of 3.08 and about equals the average of 3.09.*
4. *There was a significant drop in the length of stay from previous years. In 2006 the average stay was 5.59 days and that figure dropped to 3.37 days in 2011. The 2011 figure is also well below the average of 3.90 days.*
5. *As is to be expected, the primary market area for visitors to Warren County utilizing lodging facilities appears to be states included within, approximately, a 300 mile radius of the Lake George region.*
6. *The sharp rise in gasoline costs undoubtedly had an impact on the number of visitor events to the County and on vacation travel patterns and continues to be a variable.*
7. *The number of rooms now available in Saratoga Springs may have an impact on room utilization within Warren County.*
8. *There was a decrease in the number of rooms available in Warren County from 9,913 (in 2007) to 9,684. The number of rooms available on a year round basis decreased from 4,604 to 3,496. A decrease of 1,108 rooms during the winter months represents a 24% decrease.*
9. *Results of this Occupancy Survey mirror the results of Tourism Department Conversion Surveys in terms of which communities visitors are staying in as well as visitor origin.*

Table 8
Comparison With Previous Surveys

Comparison Chart

	1994	1995	1996	1997	1998	1999	2000	2002	2003	2004	2005	2006	2007	2008 ³	2009	2010 ⁴	2011	Avg.
Accommodations																		
Surveys Distributed	323	302	298	292	295	295	296	302	293	299	299	292	285	205	276	274	269	288
Surveys Returned	84	84	87	75	65	72	64	56	51	48	43	44	36	35	36	21	31	55
Response Rate	26.00%	27.81%	29.19%	24.32%	22.03%	24.41%	21.62%	18.50%	17.41%	16.05%	14.72%	16.15%	12.63%	17.07%	13.04%	7.66%	11.52%	18.83%
Units Responding	1,965	2,195	1,823	1,480	1,794	2,414	1,711	1,832	1,606	N/A	1,445	1,599	1,879	1,070	2,246	1,559	1,015	1,625
Occupancy Rates ¹	27.00%	26.40%	25.91%	26.43%	28.19%	30.55%	27.41%	32.67%	28.19%	25.18%	25.78%	28.26%	28.53%	32.04%	29.82%	28.61%	26.18%	28.07%
Occ w/Seasonal Adj ²											39.96%	48.22%	40.02%	55.00%	43.60%	43.51%	45.93%	45.18%
Avg. People	2.9	3.04	3.25	3.26	3.48	3.3	3.2	3.61	2.75	3.08	3.15	3.01	2.64	2.79	2.84	3.08	3.12	3.09
Avg. Stay (days)	4.2	4.26	4.05	4.05	3.94	3.75	3.67	4.56	3.19	4.23	4.03	5.59	2.96	3.19	3.60	3.06	3.37	3.86
% Reservation	81.00%	85.47%	80.98%	82.41%	85.06%	84.26%	81.43%	96.55%	81.76%	79.22%	90.68%	91.55%	81.93%	81.25%	87.51%	88.90%	82.31%	84.84%
% Business	6.00%	7.03%	8.64%	12.96%	11.02%	11.58%	16.02%	10.24%	16.68%	17.77%	10.69%	10.16%	18.79%	19.02%	18.02%	9.13%		11.99%
Lodging Guests	2,480,180	2,609,947	2,651,760	2,656,103	3,164,184	3,747,280	3,222,751	3,286,045	2,634,106	3,358,713	2,792,351	3,439,306	3,093,630	3,749,205	3,023,622	2,979,823	3,185,243	3,063,191
Room Nights ¹	855,234	858,535	815,926	814,756	909,248	1,135,539	1,007,110	910,262	957,857	1,090,491	886,461	1,142,627	1,171,830	1,343,801	1,064,656	967,475	1,020,911	997,219
Campgrounds																		
Surveys Distributed		40	40	40	40	40	40	39	42	34	36	35	35	21	27	22	36	35
Surveys Returned		18	16	12	18	10	7	13	15	16	12	11	12	10	10	0	14	12
Camping Guests	1,185,654	1,127,440	956,219	884,278	1,137,997	1,192,482	1,242,613	1,246,051	1,543,187	1,703,632	941,769	833,617	781,757	582,898	640,038	NA	708,593	1,044,264
Attractions																		
Surveys Distributed			114	115	122	127	127	130	177	182	179	207	189	99	169	221	271	162
Surveys Returned			23	16	16		11	23	26	20	13	16	16	14	39	15	34	19
Day Trips ⁵		3,889,933	4,010,220	5,461,350	4,660,696	4,559,781	4,465,364	5,491,223	4,664,474	5,652,746	3,734,120	4,272,923	3,875,387	4,332,103	3,663,660	2,979,823	3,893,836	4,350,477
Total Visitor Events	3,665,834	7,627,320	7,618,199	9,001,731	8,962,877	9,499,543	8,930,728	10,023,319	8,841,767	10,715,091	7,468,240	8,545,846	7,750,774	8,664,206	7,327,320	5,959,646	7,787,672	8,140,595

Table 8 Footnotes:

1. Based on total number of rooms in Warren County.
2. Based on number of rooms available seasonally. This figure is derived from Table 3 Seasonal Adjustments, beginning in 2005.
3. Number of surveys distributed is down significantly due to solicitation by email address. From 2009 -2010 surveys were send both electronically and via email. 2011 surveys were sent only via postal mail.
4. Ø campgrounds answered the survey in 2010.
5. This figure is derived from information published by D.K. Shifflet and Associates. Starting in 2006 the Day Trip figure was assumed to be half of the Total Trips, and beginning in 2006 is a derived number based on an equal amount of overnight guests to the area.