

APPENDIX B - 2012-2020 Tompkins County Strategic Tourism Plan

Performance Indicators for the Tompkins County Tourism Industry

Performance Indicator by Data Source	Average Annual Values						
	2005	2006	2007	2008	2009	2010	2011
Hotel Occupancy Tax - Tompkins County							
Room Tax (\$ mn)	\$1.32	\$1.49	\$1.70	\$1.80	\$1.69	\$1.79	\$1.92
Annual growth in room tax		13%	14%	6%	-6%	6%	7%
Gross Room Sales (\$ mn)	\$31.7	\$35.6	\$40.3	\$43.1	\$40.2	\$42.6	\$45.4
Taxable Room Sales (\$ mn)	\$27.1	\$30.6	\$34.8	\$37.0	\$34.8	\$36.9	\$39.4
Exempt Room Sales (\$ mn)	\$4.6	\$5.0	\$5.4	\$6.1	\$5.4	\$5.7	\$6.0
NYS Department of Labor - QCEW							
Total Jobs in TC Tourism Industry			1,920	2,030	1,950		
Total Wages (\$ mn) in TC Tourism Industry			\$40.9	\$44.2	\$43.7		
Average Salary			\$21,300	\$21,800	\$22,400		
Location Quotient (LQ)			0.71	0.74	0.74		
% Share of All Jobs in TC Economy			3.8%	4.0%	3.9%		
% Share of All Wages in TC Economy			2.1%	2.1%	2.1%		
Jobs - Accomodations Subcluster			490	550	520		
Jobs - Food Services Subcluster			580	590	600		
Jobs - Culture, Recreation & Amusements Subcluster			400	430	370		
Jobs - Passenger Transportation Subcluster			370	380	390		
Jobs - Travel Retail Subcluster			80	80	70		
Total Wages (\$ mn) - Accomodations Subcluster			\$7.7	\$9.1	\$8.8		
Total Wages (\$ mn) - Culture, Recreation & Amusements Subcluster			\$10.7	\$12.2	\$11.5		
Total Wages (\$ mn) - Food Services Subcluster			\$8.2	\$8.6	\$9.1		
Total Wages (\$ mn) - Passenger Transportation Subcluster			\$12.8	\$12.8	\$12.9		
Total Wages (\$ mn) - Travel Retail Subcluster			\$1.5	\$1.5	\$1.4		
Tourism Economics - IMPLAN							
Total Traveler Spend (\$ mn)	\$124.6	\$148.6	\$160.9	\$170.3	\$150.8	\$157.2	\$166.3
Tourism Labor Income - Direct (\$ mn)	\$38.1		\$49.7	\$52.0	\$48.8	\$50.3	\$51.7
Tourism Labor Income - Total (Direct, Indirect, Induced) - \$	\$66.1	\$82.2	\$84.3	\$88.3	\$82.9	\$86.1	\$87.6
Tourism Employment - Direct (\$ mn)	2,353		2,314	2,366	2,275	2,328	
Tourism Employment - Total (Direct, Ind, Induced) - \$ mn	3,476	3,776	3,347	3,423	3,291	3,375	3,431
Local Taxes (\$ mn)	\$14.5	\$16.7	\$11.38*	\$11.9	\$10.8	\$11.2	\$11.7
Local Taxes other than Occupancy Tax (\$ mn)	\$13.2	\$15.2	\$9.7	\$10.1	\$9.1	\$9.4	\$9.78
Ratio of other local taxes to occupancy tax	10.01	10.22	5.71	5.61	5.40	5.24	5.09
Local tax burden relief per individual resident	145.52	167.33	113.33	118.04	106.44		
State Taxes (\$ mn)	\$6.4	\$8.5	\$10.1	\$10.6	\$9.8	\$9.7	\$10.1
Traveler Spend - Lodging (\$ mn)	\$23.6	\$35.4	\$39.1	\$41.5	\$38.1	\$39.7	\$42.3
Traveler Spend - Recreation (\$ mn)	\$8.3	\$8.4	\$9.2	\$9.6	\$8.2	\$8.2	\$8.3
Traveler Spend - Food and Beverage (\$ mn)	\$37.6	\$40.7	\$42.8	\$44.8	\$40.9	\$42.3	\$43.3
Traveler Spend - Retail (\$ mn)	\$25.0	\$28.2	\$31.1	\$34.8	\$28.8	\$31.3	\$34.6
Traveler Spend - Transportation (\$ mn)	\$26.5	\$32.1	\$34.0	\$35.7	\$31.1	\$31.7	\$33.7
Traveler Spend - Second Home (\$ mn)	\$3.6	\$3.8	\$3.8	\$3.8	\$3.8	\$4.0	\$4.1

Performance Indicator by Data Source	2005	2006	2007	2008	2009	2010	2011
STR (Smith Travel) - Tompkins County							
Hotel Occupancy (%)	59.5%	60.0%	62.1%	60.8%	57.2%	60.5%	61.6%
ADR - Average Daily Rate for Hotels	\$109.52	\$114.35	\$121.26	\$126.56	\$124.18	\$124.68	\$133.59
Rev Par	65.1	68.6	75.3	76.9	70.3	75.4	82.3
Revenue (\$ mn)	\$31.0	\$34.2	\$39.5	\$42.3	\$39.2	\$42.0	\$46.4
Room Supply (room nights)	476,177	498,225	524,900	550,030	556,990	563,650	563,621
Room Demand (room nights)	283,107	298,694	325,764	334,192	319,148	341,057	347,309
Total beds (hotels and motels only)	1,305	1,365	1,438	1,507	1,526	1,526	1,544
STR (Smith Travel) - Upstate NY							
Hotel Occupancy (%)	57.2	56.6	57.9	59.3	53.1	54.80%	55.70%
ADR - Average Daily Rate for Hotels	\$94.69	\$97.47	\$107.29	\$109.00	\$103.62	\$106.04	\$108.36
Rev Par	54.2	55.2	62.1	64.6	55.1	58.0	60.3
STR (Smith Travel) - NYS							
Hotel Occupancy (%)	70.5%	70.9%	71.7%	70.4%	65.6%	69.2%	70.8%
ADR - Average Daily Rate for Hotels	\$157.91	\$172.38	\$192.62	\$197.72	\$165.47	\$175.57	\$185.21
Rev Par	111.4	122.3	138.0	139.1	108.6	121.4	131.2
STR (Smith Travel) - US							
Hotel Occupancy (%)	63.1%	63.4%	63.1%	60.4%	54.5%	57.6%	60.1%
ADR - Average Daily Rate for Hotels	\$90.95	\$97.31	\$104.04	\$106.55	\$98.17	\$98.08	\$101.63
Rev Par	57.4	61.7	65.6	64.4	53.5	56.5	61.1
Tompkins County Profile of Visitors (Chmura - Local Survey Research)							
Number of Visitors					843,000		
Tourism Related Spending (\$ mn)					\$156		
Satisfaction - Very Satisfied					88%		
Satisfaction - Somewhat Satisfied					11%		
Satisfaction - Combined					99%		
Intent to Return					63%		
Visitors Staying in Local Lodging					33%		
Average Spend - Overall					\$185		
Average Spend - Day-Trippers					\$51		
Average Spend - Stay with FOF					\$172		
Average Spend - Stay in Hotels					\$335		
Average Spend - Other Lodging					\$216		
Average Spend - All Overnigheters					\$265		
Length of Stay - FOF (days)					2.42		
Length of Stay - Hotel Overnigheters (days)					2.05		
Tompkins County Population	99,698	99,997	100,413	101,027	101,779		
Tompkins County Households							

*Note: State and local tax impact analysis was improved to better reflect local sales and occupancy taxes related to tourism for the 2007 Tourism Economics analysis onwards. This involved a bottom-up approach for each county related to sales taxes and occupancy taxes. The original model used a distribution of state taxes based on tourism spend in the county (top-down). So the new approach is more reflective of the differences in tax rates across counties.