



Profile of Visitors to Tompkins County

Tompkins County attracted an estimated 843,000 visitors in 2009 with associated tourism spending of \$156 million. Visitors to the area include high proportions of the affluent and well educated—a mix influenced by the presence of Cornell University and Ithaca College, two prime attractors in the county. The parks and downtown Ithaca are the other leading attractions, though visitors engage in a variety of other activities as well. Visitors express very high overall satisfaction with their experiences in Tompkins County.

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1. Executive Summary

In fall 2008 the Tompkins County Legislature's Strategic Tourism Planning Board engaged Chmura Economics and Analytics to develop a profile of visitors to Tompkins County, New York. The objectives of this research, as defined by the Tompkins County Strategic Tourism Planning Board, were primarily twofold.

- First, to obtain a series of baseline economic and demographic measures that could be used in evaluating existing tourism programs and aid in business planning for current and future tourism-related ventures.
- Second, to secure, for the first time, a sound estimate of the number of visitors to Tompkins County and to obtain a sense of visitor motivation, satisfaction and likelihood of repeat visitation.

It is important to note that this study was designed to provide a baseline. It is the stated intent of the Tompkins County Strategic Tourism Planning Board to repeat this research every three to five years. It is also important to recognize that in some instances variations may occur between this study and other research conducted at the state or regional level. These differences are the inherent result of variations in study methodology,

This study included a year-long intercept survey conducted at tourist attractions and lodging establishments within Tompkins County as well as a telephone household and a student survey. A supplemental survey was distributed to innkeepers and self-administered surveys were also made available at Visitor Center locations. In addition, previous studies were reviewed and synthesized and several tourism-related entities provided their data for analysis. The main findings of this study are summarized below. (Note that 'visitors' are defined as persons visiting Tompkins County that do not live, work, or go to school there.)

Tompkins County attracted an estimated 843,000 visitors in 2009 that generated tourism spending of \$156 million.

These estimates of visitor spending and volume are 2009 figures based on data from the surveys conducted for this study supplemented by other sources. The \$156 million spending figure in 2009 is lower than the estimated \$170 million in 2008 estimate from Oxford Economics, due to the effect of the economic recession—national tourism industry sales in the first three quarters of 2009 were 9.5% lower than the same period in 2008. The Tompkins County tourism industry is estimated to have directly provided 2,366 jobs in 2008 and to have generated tax revenue amounting to \$597 per household in the county.

Forty-seven percent of visitors to Tompkins County make the trip for a university- or college-related purpose.

Cornell University and Ithaca College are huge engines for drawing visitors to the county. This derives from travelers coming to visit family and friends who work or go to school at the university or college; prospective student tours; dropping off and picking up students; events such as athletics and graduations; and other purposes such as visiting museums or other attractions. Note that visitors traveling for academic reasons included both leisure and business travelers.

Among all visitors to the county, 75% are leisure travelers, 15% are business travelers, and the remainder travel for both leisure and business reasons.

Among those staying in hotels or similar lodging establishments (motels, resorts, inns, or bed and breakfasts), 27% are business travelers while another 13% are traveling for a purpose that includes both leisure and business. Leisure travelers are especially predominant among those staying overnight with family and friends (accounting for 87% of that group) and day trippers (82% of which are leisure travelers).

Outside of the educational institutions, the attraction or characteristic of the Ithaca area that most motivated leisure visitors to visit the Ithaca area is the state parks and gorges.

Motivators for travel to Tompkins County (with the highest motivators first) were the state parks, gorges, and waterfalls; the downtown area and the Commons; dining and restaurants; Cayuga Lake; arts, music, and theatre; and the wineries. Motivational factors vary according to the type of traveler—for example, if they are staying with family or friends, making a day trip, or staying at a hotel or similar lodging establishment. Travelers staying at hotels and similar establishments are more likely to be in town for a university- or college-related reason.

Over half of visitors to Tompkins County are from the state of New York.

New York accounts for 53% of visitors to the county with another 22% coming from other US Northeast states. The top home metropolitan areas of visitors are New York, Binghamton, Syracuse, and Rochester. Among overnight visitors only, the top home metropolitan areas are New York, Rochester, Philadelphia, Boston, and Washington D.C. The New York counties supplying the most visitors to Tompkins County are the counties of the state metro areas as well as the rural counties bordering and close to Tompkins County.

Sixty-nine percent of visitors to Tompkins County are repeat visitors.

The high percentage of repeat visitors to the county are boosted by day trippers from nearby localities, visitors staying with family and friends, and university visitors whose purpose of visit (such as dropping off and picking up a student) requires multiple trips. An estimated 40% of visitors average at least one visit to Tompkins County per year. Among those staying at hotels and similar lodging establishments, 41% are first-time visitors. In the intercept survey, the percentage of first-time visitors peaked in the June to August period.

Visitor volume to Tompkins County peaks in the summer months of July and August.

Seasonality patterns vary according to the type of visitor. The volume of travelers staying at households in the county peaks in December during the holidays while the volume of visitors staying overnight with students varies according to the academic year, peaking in fall and early spring. The overall visitor pattern, however, peaks in the summer with the smallest number of visitors coming in January and February. Events causing a spike in visitor volume include graduations in May and student drop-off in August.

Visitors to the Ithaca area are generally highly-educated and affluent.

An estimated 41% of visitors to Tompkins County have household incomes of \$100,000 or more with about half of those having incomes of \$150,000 or more. These affluent visitors are more likely to stay at hotels or similar lodging establishments than with family or friends. Forty-one percent of visitors have a graduate degree. Both high educational attainment and high household incomes among visitors are due to the presence of the university and college as visitors traveling with purposes related to those institutions are more likely to have more education and higher household incomes.

The average traveling party to Tompkins County consists of 2.9 people and the average visitor stays in the county for 1.4 nights.

The average traveling party of 2.9 people consists of 2.4 adults and 0.6 children under 18 (these numbers do not sum due to rounding). Though the average overall stay is 1.4 nights, this figure includes those on a day trip; for overnight visitors only, the average stay is 2.3 nights. The average stay among visitors staying at hotels or similar accommodations is 2.1 nights. In the intercept surveys, the average travel party size was largest during the period from June to August.

Forty-two percent of visitors to Tompkins County visit the downtown Ithaca-Commons area.

While the activities of Tompkins County visitors vary by the purpose of their trip (business, leisure, academic), the Commons lives up to its name. It is just as likely to be visited by university or college visitors as by visitors traveling for other reasons. Visitation of the downtown area is more likely among travelers aged 18 to 35 and more likely among leisure travelers than business. Visitation to downtown Ithaca and the Commons is less likely among travelers aged 65 and over and less likely in the winter months.

Thirty-nine percent of visitors to Tompkins County visited the parks, waterfalls, and gorges.

These amenities are more likely visited by general travelers as opposed to those traveling for a university- or college-related purpose. The parks, waterfalls, and gorges are also more likely to be visited by first-time visitors to the area. Among general travelers, the parks, waterfalls, and gorges are more likely to be visited by those aged 54 and younger, and more likely visited by traveling parties with children under the age of 18. Excluding university- and college-related visitors, likelihood of visiting these outdoor attractions is fairly even across all household income groups.

Food and drink rank high in importance to Tompkins County visitors.

As a factor motivating visits to the Ithaca area, 'dining and restaurants' was ranked number three behind 'gorges and state parks' and 'downtown Ithaca and the Commons.' Furthermore, 17% of visitors to the county said they visited a winery, the fourth ranked activity behind visiting Cornell; downtown Ithaca and the Commons; and the parks, waterfalls, and gorges. Visitors often cited specific food-related experiences as an aspect they most enjoyed. Specific visitor favorites include the Moosewood Restaurant and the Farmer's Market. Wineries in the area are more likely to be visited by general overnight travelers than those overnighing for academic purposes and are more likely to be visited by those staying at a bed and breakfast than those lodging elsewhere.

Over half of visitors to the Ithaca area use the internet for trip planning.

About 54% of visitors use the internet for trip planning to Tompkins County; among those staying at hotels or similar lodging establishments, approximately two-thirds use the internet. First-time visitors are more likely to use the internet than others—especially since repeat visitors are more likely to use past experience instead of a specific planning resource. According to responses from surveys at the Visitors Center, the top three websites used for internet research on the area are VisitIthaca.com (used by 52%), Cornell.edu (17%), and Ithaca.edu (13%). Other resources used for trip planning include none/personal knowledge, friends and family, printed materials, and AAA. The use of a travel agent was very low among survey respondents.

Among visitor center survey respondents, the median average advance trip-planning time was one month.

Among the survey respondents, one-quarter planned their trip seven days in advance or less. Thirteen percent began planning the trip less than a month in advance but more than a week. Forty-three percent made their decision between one and three months prior to the trip. Another 18% planned four months to a year out and the remaining 1% made the decision to travel more than a year before the actual trip.

Travel to the county is primarily done by automobile.

About 86% of visitors travel to Tompkins County by automobile. Twelve percent travel by air—a figure that includes those traveling both by air and by auto. An estimated 5% of visitors come to the county by bus.

Among visitors, an estimated 22% included the Ithaca area as part of a larger trip.

Other destinations on such larger-trip itineraries included the New York State localities of Syracuse, New York City, Niagara Falls, and Rochester. Boston was also frequently listed as a destination, especially among those on prospective student tours (and so, presumably, may also have been visiting Harvard). Among overnight, leisure travelers staying at hotels or similar establishments, 27% were on a trip with multiple destinations.

Half of Tompkins County overnight visitors lodge at a hotel, motel, or resort.

Hotels and similar establishments ranked number one for overnight lodging, followed by lodging with family or friends which accounted for 31% of overnight visitors. An estimated 7% of overnight visitors stay at campgrounds. While some individuals stayed overnight outside of Tompkins County and took a day trip in for a visit, the reasons most often cited had nothing to do with cost or availability of lodging within the county.

Satisfaction of visitors with their experience in the Ithaca area is extremely high.

Nearly all visitors are satisfied with their visits to the area: 88% are very satisfied and another 11% are somewhat satisfied. Aspects of the area often cited by visitors as what they enjoyed the most or found most memorable included the natural beauty, one or more of the many aspects of Cornell University, the dining and food options, the people, and the feel of the area—the ambiance, diversity, the peacefulness, etc. Less than 1% of visitors are very dissatisfied, yet when asked what aspects of Ithaca they did not enjoy, 17% of survey respondents cited the roads and traffic; still others complained about parking and construction. Visitors demonstrated their satisfaction with the area by stating they would be likely to come back again; among first-time leisure visitors, 63% said they would probably or definitely come back to the area for a leisure trip in the next five years.

2. Tompkins County Visitor Profile

Three primary surveys were conducted (visitor intercept, household, and student surveys) to capture all types of visitors to Tompkins County. Further information on these surveys and the methodology used is found in Section 3. From these surveys, along with other data, a complete visitor profile was developed which is presented in this section.

2.1. Visitor Volume

2.1.1. Total Visitor Volume

Overall, there were 843,135 total visitors to Tompkins County in 2009.¹ Among these, 33% stayed in local lodging establishments, 19% stayed with family or friends (on and off campus), 11% had other lodging arrangements, and 37% were day trippers. The technical details for how these figures were derived are presented in this section.

Total visitor volume for 2009 was estimated using the survey data and secondary, publicly available data sources. Data are projected over the whole county based on the numbers of households and students in Tompkins County in 2009, based on projections of census data. The percentage of visitors staying in hotels and motels is gleaned from the surveys and projected to the whole county based on 2009 total room-night data from Smith Travel Research.

To estimate total visitor volume, visitors to Tompkins County were classified into the following four non-overlapping groups:

- Visitors staying in hotels, motels, or bed & breakfasts (B&Bs)
- Visitors staying with family and friends
- Visitors making other lodging arrangements (campgrounds, dorms, etc.)
- Day trippers (including those staying outside Tompkins County but taking a day trip in)

The total number of visitors staying with family and friends is estimated based on data collected from the household survey. The surveyed respondents indicated that in 2008, 223 surveyed households had a total of 787 visitors. In other words, the average household had 3.5 visitors in that year. The number of households in Tompkins County is estimated to have been 37,918 in 2009.² Based on the above information, total visitors staying with family and friends (excluding campus visitations) is estimated to have been 133,820 in 2009.

Another group of visitors staying with family and friends are those coming to visit and staying with a friend or family member on a university or college campus. This group is estimated based on the data collected from the student

¹ Despite efforts to capture all visitors to Tompkins County, this number may still under count visitors coming to Ithaca at times and for activities which make them difficult to intercept via surveys. See the appendix for details on the timing and locations of the intercept surveys.

² The latest Census data indicate that, from 2006 to 2008, there were 37,749 households in Tompkins County. The Census data also indicated that, from 2000 to 2008, the number of households in the county increased 0.5% per year. Assuming that the number households in the county continued to grow at the same rate, the number of households in 2009 is estimated to have been 37,918.