



## 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.<sup>1</sup> 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.<sup>2</sup> 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

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<sup>1</sup> 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.

<sup>2</sup> 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.

survey. The survey indicates that in 2008, 68 surveyed students had a total of 147 visitors,<sup>3</sup> or each on-campus student had 2.2 visitors in this year. The number of county residents living in group quarters is estimated to have been 13,088 in 2009.<sup>4</sup> Therefore, total visitors staying with students on campus is estimated to have been 28,078 in 2009. Together, the total number of visitors staying with family and friends in 2009 is estimated to have been 161,898.

<b>Table 2.1: Estimated Total Visitors to Tompkins County (2009)</b>		
	Number	Percent
Staying with Family and Friends	161,898	19%
Staying in Hotels/Motels/B&B	278,462	33%
Other Lodging (Camping, Dorm, etc.) <sup>5</sup>	88,795	11%
Day Trippers	313,980	37%
Total	843,135	100%
Source: Chmura Economics & Analytics		

The total number of visitors staying in lodging establishments is estimated with information from Smith Travel Research supplemented by a lodging survey Chmura distributed to Tompkins County inn keepers in 2009. Data from Smith Travel Research indicated that the 19 hotels and motels reported total room nights of 318,432 in 2009. A lodging list provided by the Tompkins County Convention and Visitor Bureau indicated that outside those 19 hotels and motels, there were also 73 other lodging establishments in the county, a number predominantly comprising bed and breakfasts. It is estimated that the lodging establishments other than the 19 hotels and motels account for 11% of total hotel rooms in the county.<sup>6</sup> The total room nights (including hotels, motels, and B&Bs) in 2009 is estimated to be 357,895. Moreover, the supplemental lodging survey indicated that the average hotel room had 1.4 guests per room, and the average guests spent 1.77 nights in a lodging establishment. Combining that information gives an estimate of 283,779 persons in 2009 that stayed in a hotel, motel, or B&B. However, as measured in the household and student surveys in 2009, a small number of those were county residents or resident college students. Removing those, there were an estimated 278,462 visitors in Tompkins County staying in hotels, motels, and bed and breakfasts in 2009.

The numbers of visitors in other segments were calculated via the following method. The intercept survey indicated that 11% of respondents stayed in other lodging establishments and the remaining 39% were day trippers.<sup>7</sup> Since

<sup>3</sup> In this calculation, students who live off campus were excluded to avoid overlapping with the household survey. Total surveyed students numbered 101 with 68 living on campus.

<sup>4</sup> Group quarters include residents in dorms and jails. Based on a report by State Commission of Correction, it is estimated that the prison population in Tompkins County is about 100. The latest Census data indicate that, from 2006 to 2008, there were 12,957 group quarter residents in Tompkins County. The Census data also indicated that, from 2000 to 2008, the number of residents in group quarters in the county increased 1.0% per year. Assuming that the number group quarter residents grew at the same rate, this number in 2009 is estimated to have been 13,088.

<sup>5</sup> Per data from the New York State Office of Parks, Recreation, and Historic Preservation, 18,791 non-Tompkins County residents stayed overnight at the state parks in the county. Note that this other lodging category includes these individuals as well as those camping at other locations in the county (such as the Pinecreek Campground and Spruce Row Campsite), those staying in dorms or on boats, and also those who stayed at more than one type of lodging—for example, in the intercept surveys several parties reported staying at several locations such as one night at a hotel and then one night with family and friends.

<sup>6</sup> Based on the supplemental lodging survey, it is assumed that the average bed and breakfast establishment has 2.6 rooms.

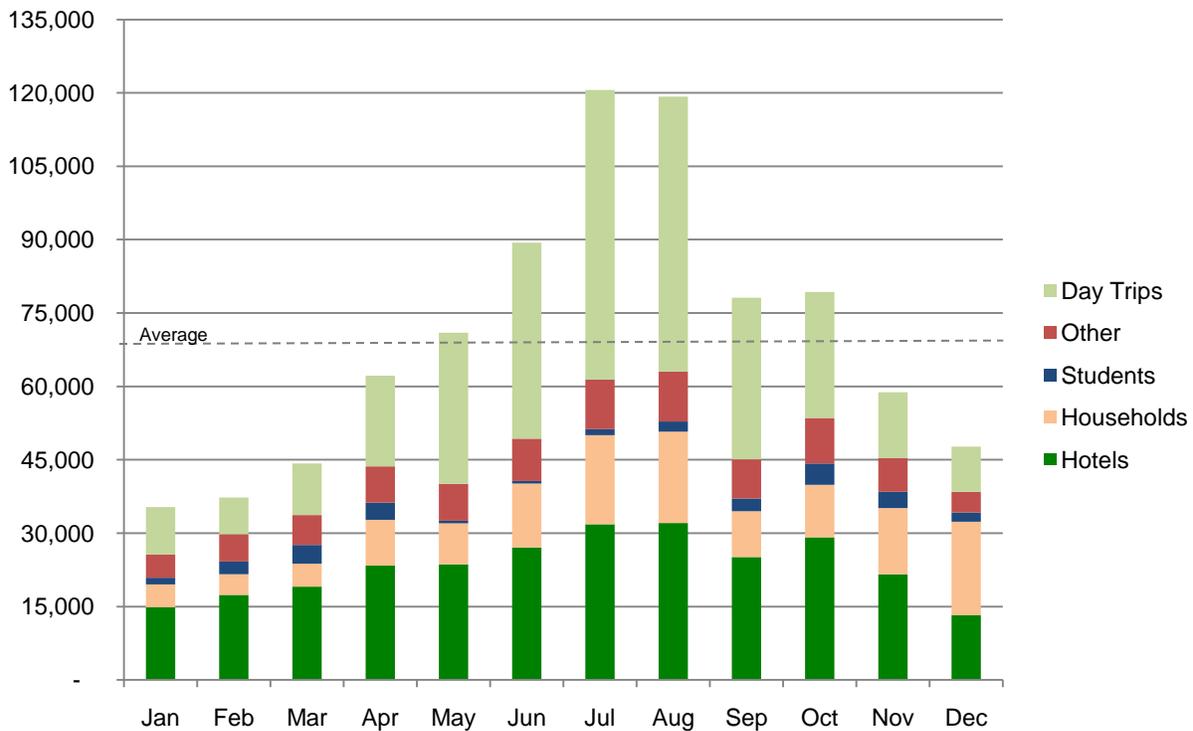
<sup>7</sup> The day trippers include those who were lodging away from home but outside Tompkins County.

the visitor intercept survey indicates that 35% of survey respondents stayed in a hotel, motel, or B&B, and since this group consists of 278,462 visitors as calculated above, the total intercept survey universe is estimated to be 795,605—a figure that includes all visitors except those that could not be intercepted, meaning those staying with family and friends and not engaged in typical tourist activity that would enable them to be intercepted. As a result, the number of visitors using other lodging arrangements is calculated to be 88,795 while day trippers are estimated to have numbered 313,980 in 2009.

### 2.1.2. Seasonality in Visitor Volume

Strong seasonality exists in Tompkins County tourism. Average visitor volume is estimated to be 70,261 per month. As expected, the summer season, especially July and August, are the most popular of the year. These two months capture 28% of the total annual visitations. Monthly volume in July and August are about 70% higher than the monthly average for the year while the visitor volume in January is nearly half of the average monthly volume (Figure 2.1).

**Figure 2.1: Total Visitors to Tompkins County by Month (2009)**



There are significant differences in seasonality among different types of travelers. For example, while December is typically low season for hotels and lodging establishments, it is one of the top months for visitors (14% of total) who stay at the households of family and friends, as many people conduct such visits during the holiday season. Other peak months for household visitors occur in the summer season (July and August). Visitor volume of those staying with students fluctuates with the academic calendar. Summer months (June and July) have the lowest student visitor volume while fall and spring are the peak seasons for student overnight visitors. Hotel visitor volume peaks in July and August with October being the next-most popular month.

## 2.2. Visitor Characteristics

Visitor characteristics include place of residence, demographic attributes (gender, age, and race), and socioeconomic characteristics, including household income and education background. All descriptions that follow in this section are based upon the respondents to the intercept survey which is described in detail in the appendix. Only one respondent was interviewed from any traveling party and only those 18 and older were surveyed. For purposes of the survey, only Tompkins County visitors were interviewed, a group defined as those visitors who do not live, work, or attend school in the county.

### 2.2.1. Visitor Origin

Over half of all visitors (53%) are from the state of New York (Table 2.2). Over a fifth (22%) of visitors are from other states in the US Northeast while a little less than an fifth (18%) are from other portions of the nation. About 6% of Tompkins County visitors are foreigners with Canadians accounting for about half of these. There are significant residence differences among different visitor segments. For example, 78% of day trippers are from New York State and 16% are from other Northeast states. Visitors who stay in hotels and similar establishments are more diversified, with only 34% being residents of the state of New York.

Table 2.2: Tompkins County Visitor Origins					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
New York State	42%	34%	46%	78%	<b>53%</b>
US Northeast (Excluding NY)	23%	29%	23%	16%	<b>22%</b>
US South	16%	14%	9%	2%	<b>9%</b>
US Midwest	8%	9%	5%	1%	<b>5%</b>
US West	4%	7%	7%	1%	<b>4%</b>
Canada	4%	4%	4%	1%	<b>3%</b>
Other Foreign Countries	3%	3%	5%	1%	<b>3%</b>

Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics

Visitor origins also vary according to their purpose of travel. Leisure travelers are more likely to live close to Tompkins County than business travelers. Over half (55%) of leisure visitors reside in New York State (Table 2.3) as opposed to 37% of business travelers and 37% of those visiting Tompkins County for a university- or college-related purpose. Note that traveling for a university- or college-related purpose was defined in the intercept survey to include such items as campus tours, campus events, dropping off or picking up students, and visiting family or friends who work there (see the intercept survey report in the appendix for more details).

Table 2.3: Tompkins County Visitor Origins by Purpose <sup>8</sup>				
	Business	Leisure	Business and Leisure	University- or College-Related
New York State	37%	55%	34%	37%
US Northeast (Excluding NY)	24%	23%	27%	30%
US South	11%	9%	17%	12%
US Midwest	10%	5%	10%	8%
US West	9%	3%	8%	6%
Canada	4%	3%	3%	2%
Other Foreign Countries	6%	2%	2%	4%

Source: Chmura Economics & Analytics

Table 2.4 lists the top twenty metropolitan areas of residence of Tompkins County visitors. The left side of the table includes the top origins of all travelers, a group that prominently includes the upstate New York metros which provide Tompkins County with many of its day trippers. The right side of the table includes overnight visitors only.

The New York City metropolitan statistical area provides Tompkins County with 17% of all its visitors and 23% of its overnight visitors. For all visitors, four of the next five top feeder markets are New York state metros: Binghamton (9% of all visitors), Syracuse (7%), Rochester (6%), Philadelphia (3%), and Buffalo-Niagara Falls (3%). For overnight visitors, large East Coast metros are featured high on the list; following New York City are Rochester (6% of all overnight visitors), Philadelphia (5%), Boston (3%), Washington D.C. (3%), and Buffalo-Niagara Falls (3%).

Table 2.4: Tompkins County Visitors by Top 20 Metros			
All Visitors		Overnight Visitors	
Metro Areas	% of Visitors	Metro Areas	% of Visitors
New York City	17%	New York City	23%
Binghamton	9%	Rochester	6%
Syracuse	7%	Philadelphia	5%
Rochester	6%	Boston	3%
Philadelphia	3%	Washington, DC	3%
Buffalo-Niagara Falls	3%	Buffalo-Niagara Falls	3%
Boston	2%	Syracuse	3%
Elmira	2%	Albany	2%
Washington, D C	2%	Chicago	2%
Albany	2%	Los Angeles	1%
Chicago	2%	Miami	1%
Los Angeles	1%	New Haven	1%
Poughkeepsie	1%	Pittsburgh	1%
New Haven	1%	Binghamton	1%

<sup>8</sup> Note that these categories of purpose are not mutually exclusive; namely, the university- or college-related category overlaps with each of the other three.

Utica	1%	Baltimore	1%
Miami	1%	Poughkeepsie	1%
Pittsburgh	1%	Allentown	1%
Allentown	1%	Kingston	1%
Bridgeport	1%	Bridgeport	1%
Baltimore	1%	Atlanta	1%
Source: Chmura Economics & Analytics			

Within New York State, 15 counties supply 72% of all in-state visitors to Tompkins County (Table 2.5). These top feeder counties include counties of metro areas in upstate New York (Broome, Monroe, Onondaga, and Erie), populated counties in the New York metropolitan area (New York, Westchester, Nassau, Kings, Queens, and Suffolk), and rural counties close to Tompkins County (Tioga, Chemung, Cortland, Steuben, and Cayuga).

Figure 2.2: Tompkins County Visitors by New York Counties

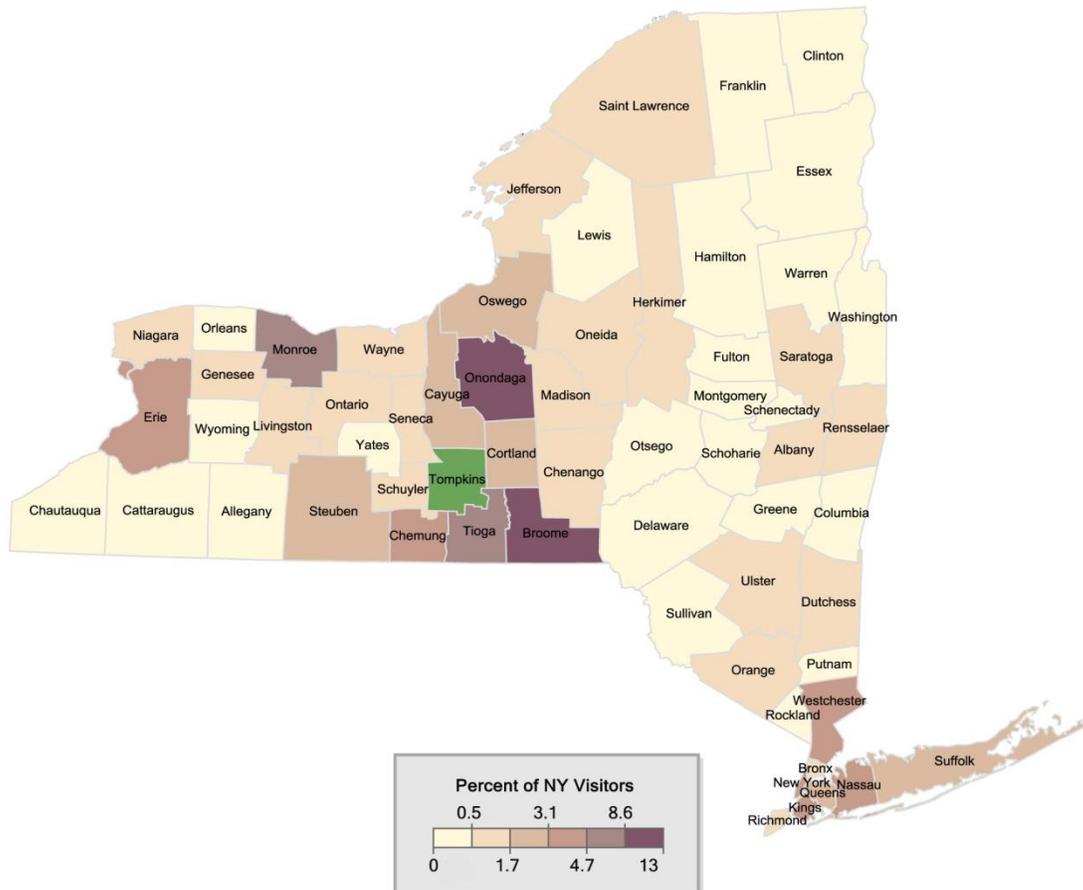


Table 2.5: Top Fifteen Counties of Origin of New York State Tompkins County Visitors	
County	Percent of State Total
Broome	12%
Onondaga	9%
Monroe	8%
Tioga	5%
New York	5%
Erie	4%
Westchester	4%
Chemung	4%
Kings	4%
Nassau	3%
Queens	3%
Cortland	3%
Cayuga	3%
Steuben	3%
Suffolk	2%
Other NY Counties	28%
New York - Total	100%
Source: Chmura Economics & Analytics	

## 2.2.2. Visitor Demographics

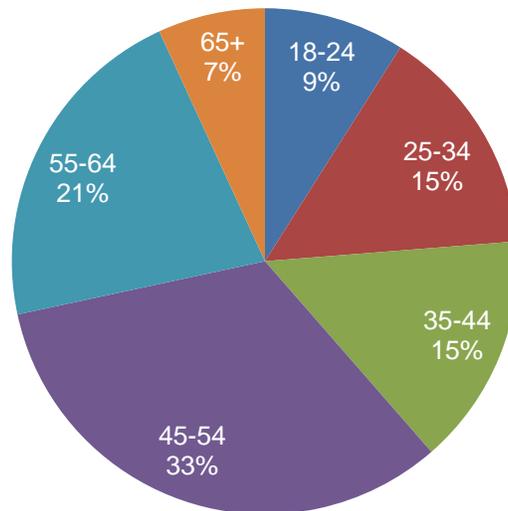
### 2.2.2.1. Gender

The overall gender distribution of Tompkins County adult visitors is approximately even, 51% male and 49% female according to weighted results from the intercept survey. There are some differences in gender distribution for subgroups of visitors. For example, more women tend to come to Tompkins County to visit family and friends; of those visiting family and friends, 55% are female and 45% male. On the other hand, male visitors account for a slightly larger percentage for day trippers, 54% as opposed to 46% of females. Male visitors also account for a larger proportion for business travelers, 55% of which are male.

### 2.2.2.2. Age

Visitors to Tompkins County include a high proportion of the upper-middle ages. Visitors in the 45 to 64 cohort account for a little over half (54%) of adult visitors (Figure 2.3).<sup>9</sup> This cohort is especially prominent among visitors as it includes parents of university and college students who visit the county for purposes related to their children's education. Among the other age groups, 24% of visitors are aged 18 to 34 and 15% are between 35 and 44 years old. The retired-age cohort of 65 years and over provides 7% of all visitors. These results are similar to Ithaca Downtown Partnership survey which found that half of downtown visitors to be between the ages of 36 and 55; in comparison, this study found 48% of visitors to be between the ages of 35 and 54.

<sup>9</sup> Age figures are based on results from the intercept surveys which recorded the age of the respondents. By survey criteria, only those 18 and older were interviewed.

**Figure 2.3: Age Distribution of Visitors to Tompkins County**

- Younger visitors are more common among those staying overnight with family and friends. Visitors 34 and younger account for approximately 49% of those staying with family and friends compared to 26% of visitors overall.
- Travelers aged 45 to 54 account for 41% of those visiting Tompkins County for a university- or college-related purpose compared to 25% of those visiting for other reasons.
- The 45 to 54 years cohort is also more prevalent among business travelers. Forty-one percent of business travelers belong to this age group compared to 29% for leisure visitors.

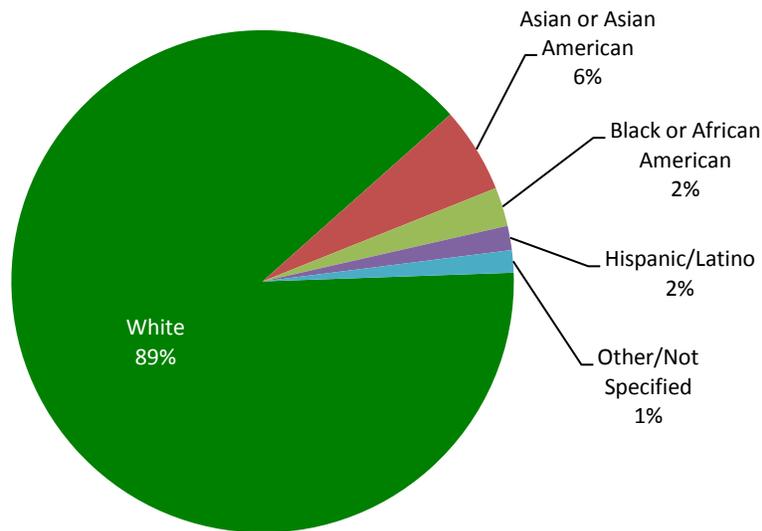
### 2.2.2.3. Race and Ethnicity

Visitors to Tompkins County have a racial and ethnicity make-up not too dissimilar to the resident population (Figure 2.4). Eighty-nine percent of visitors to Tompkins County are white, 6% are Asian or Asian American, and 2% are black or African American. By comparison, the population of Tompkins County is 83% white, 10% Asian, and 4% black or African American.<sup>10</sup> The surveys found little difference in racial and ethnicity make-up among different visitor segments.

These results are consistent with some previous studies. For example, the Ithaca Downtown Partnership Survey found that 85% of visitors to the area are white.

<sup>10</sup> US Census Bureau 2006-2008 American Community Survey.

**Figure 2.4 Race and Ethnicity of Visitors to Tompkins County**



### 2.2.3. Visitor Socioeconomic Characteristics

#### 2.2.3.1. Household Income

Visitors to Tompkins County are generally affluent, a characteristic consistent with travel related to post-secondary schools. About 42% of visitors have an annual household income over \$100,000 (Table 2.6) and 21% have a household income over \$150,000. Below \$100,000, the household incomes are fairly evenly distributed in different income brackets. The average household income of all Tompkins County visitors is estimated to be \$90,931 per year.

**Table 2.6: Household Income of Tompkins County Visitors**

Income Bracket	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Less than \$20,000	16%	3%	9%	6%	<b>7%</b>
\$20,000-49,999	26%	7%	14%	18%	<b>15%</b>
\$50,000-79,999	22%	14%	27%	27%	<b>22%</b>
\$80,000-99,999	11%	14%	19%	15%	<b>14%</b>
\$100,000-149,999	13%	26%	16%	21%	<b>21%</b>
\$150,000+	11%	36%	16%	15%	<b>21%</b>
Total	100%	100%	100%	100%	<b>100%</b>

Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics

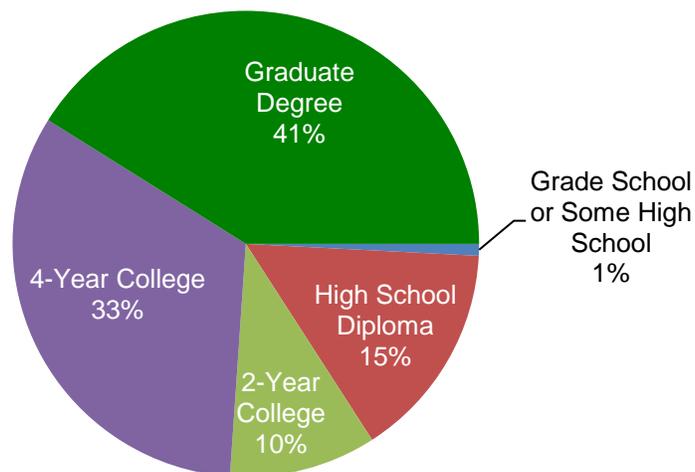
- Those visiting Tompkins County for a university- or college-related purpose were more likely to have incomes of \$100,000 or more. Forty-seven percent of visitors traveling for this purpose had household incomes of \$100,000 or more compared to 28% of visitors coming to Tompkins County for other reasons.
- Among visitor segments, visitors who stay with family and friends have lower household incomes than other groups. The average annual household income of this group is \$68,598, about three-fourths of average overall visitor household income.
- Visitors who stay in hotels and similar establishments have the highest average household income among the four visitor groups, \$111,565 per year; 62% of visitors in this group have a household income over \$100,000.
- The average household income of day trippers is \$85,638 per year, below the average for all visitors.

Compared to the income distribution of households within Tompkins County, visitors are more affluent. In the Chmura Tompkins County household survey, only 13% of households reported an annual income over \$100,000 in 2008. Among visitors, 42% reported household incomes in excess of \$100,000. Conversely, 49% of Tompkins County households reported incomes below \$50,000 compared to 22% among visitors.

**2.2.3.2. Education Attainment**

Visitors to Tompkins County are highly educated, a characteristic consistent with high household incomes and travel for college/university purposes. A third (33%) of adult visitors hold a bachelor’s degree and 41% have a graduate degree (Figure 2.5). This is similar to the county resident population with 53% of adults aged 25 and older holding a bachelor’s degree or higher.<sup>11</sup> By comparison, 32% of adults in New York State have a bachelor’s degree or higher.

**Figure 2.5: Educational Attainment of Visitors to Tompkins County**



<sup>11</sup> US Census Bureau 2006-2008 American Community Survey.

- Eighty-three percent of visitors to the county who traveled for university- or college-related reasons had a bachelor’s degree or higher compared to 65% of visitors who traveled for other purposes.
- Higher educational attainment and higher household incomes are more closely correlated to those staying at hotels and similar establishments compared to those staying with family or friends or day trippers. Nearly half (48%) of those lodging at hotels or similar establishments have a graduate’s degree or higher compared to 38% of those staying overnight with family and friends and 36% of day trippers.
- Half (50%) of business travelers have a graduate’s degree or higher compared to 39% among leisure travelers.

## 2.3. Purposes of Visiting Tompkins County

This section focuses on the purposes of visiting Tompkins County: the general travel purposes of visitors, such as business or leisure, and the specific purposes of leisure visitors and university- or college-related visitors.

### 2.3.1. Overall Purpose of the Trip

The majority of visitors come to Tompkins County for leisure purposes. Leisure visitors account for 75% of the visitors to Tompkins County (Table 2.7). Business travellers account for 15% of visitors and 9% of visitors travel for both leisure and business purposes.

Table 2.7: Purpose of the Trip					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Business	5%	27%	14%	11%	15%
Leisure	87%	60%	77%	82%	75%
Both	8%	13%	9%	7%	9%
<b>University Related</b>					
University Related	44%	69%	45%	30%	47%
Percent of Business Trips	50%	83%	69%	88%	81%
Percent of Leisure Trips	41%	58%	37%	18%	36%
Percent of Mixed (Both) Trips	77%	89%	60%	59%	76%
<b>Non-University Related</b>					
Non-University Related	56%	31%	55%	70%	53%
Percent of Business Trips	50%	17%	31%	12%	19%
Percent of Leisure Trips	59%	42%	63%	82%	64%
Percent of Mixed (Both) Trips	23%	11%	40%	41%	24%

Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics

- Business travelers are more common among those overnighing in hotels and similar establishments. Business travelers account for 27% of those lodging in such accommodations compared to 15% of overall visitors.
- Cornell University and Ithaca College contribute significantly to the tourism business of Tompkins County. Forty-seven percent of all visitors to Tompkins County have travel purposes connected to either Cornell University or Ithaca College. Among visitors staying in hotels or similar establishments, the percentage is an even higher 69%. In contrast, only 30% of day trippers visit the county for university- or college-related purposes.
- Eighty-three percent of business travelers are connected with the university or college, including those attending conferences and touring with prospective students. The detailed purposes of university- or college-related visitors are shown in Section 2.3.3.

- Place of origin influences the purpose of travel. For example, leisure travelers make up a higher percentage of those from New York State (82%) and Canada (74%) but smaller percentages of those from other foreign countries (62%) or the US West (56%).

### 2.3.2. Purpose of Leisure Visitors

Visitors who traveled at least partially for leisure were asked to rank eight attractions in terms of their importance in motivating travel to Tompkins County. Each of these attributes was ranked on a scale from one to five with one being “not at all important” and five being “very important.” Taking a four or a five as meaning at least somewhat important, a ranking of important attributes is shown below (Table 2.8). Gorges and state parks ranked the highest in terms of importance, followed by downtown Ithaca, and dining and restaurants. Though other attributes had lower scores, each attribute was important to a significant number of visitors among certain visitor segments.

Table 2.8: Motivation for Visit - Percentage Ranking "Important"					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Gorges & State Parks	38%	36%	67%	47%	44%
Downtown Ithaca and the Commons	36%	36%	28%	36%	35%
Dining & Restaurants	31%	33%	29%	38%	34%
Cayuga Lake	23%	25%	32%	26%	26%
Arts, Music, and Theatre	22%	17%	15%	20%	19%
Wineries	17%	20%	31%	14%	18%
Discovery Trail & Museums	8%	10%	11%	17%	13%
B&Bs, Inns, & Resorts	2%	24%	12%	2%	9%

Source: Chmura Economics & Analytics

- A little less than a quarter (23%) of leisure visitors did not rank any of the eight attributes as “important.” This group, however, included university- or college-related travelers (35%) and travelers engaged in enrollment tours or student pickup/drop off (25%). Other portions of this group included event attendees and those visiting family and friends.
- The intercept survey results showed cross-over interests between attributes. For example, those who rate wineries as important were more likely to rate Cayuga Lake as important and vice versa. Cross-over interests also exist between the Discovery Trail and museums and arts, music, and theatre; between dining and restaurants and B&Bs, inns, and resorts; between dining and restaurants and downtown Ithaca and the Commons; and between Cayuga Lake and gorges and state parks. (See the appendix for further details.)
- In self-administered surveys at the Ithaca Visitors Bureau, respondents were asked in open-ended questions about their primary and secondary motivational factors for visiting the area. The primary motivational factors most listed were: Cornell/Ithaca College; natural beauty/scenery; waterfalls/gorges; Cayuga Lake/Fingerlakes; family; outdoor activities; and wineries. The top secondary motivational factors listed were: proximity/location; Cornell/Ithaca College; natural beauty/scenery; waterfalls/gorges; dining/food; wineries; and recommendations (that is, recommendations from friends, family, etc).

### 2.3.3. Purpose of University- or College-Related Visitors

Of travelers who visited Tompkins County for university- or college-related purposes, an estimated 38% visited friends and family members who work at a university or college (Table 2.9). In addition, an estimated 14% toured with a prospective student and 9% picked up or dropped off a student. There are considerable differences in travel purposes among the different segments of visitors. Among university- or college-related visitors staying in hotels

and similar establishments, for example, 21% came to the county for a tour with a prospective student compared to only 7% of those staying with family or friends. The large percentage (38%) of day trips with “other” purposes included visitors to museums and the plantations, among other items.

<b>Table 2.9: Purpose for University- or College-Related Visitors</b>					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Visiting family/friends who work at university/colleges	69%	24%	33%	36%	<b>38%</b>
Touring with prospective student	7%	21%	17%	12%	<b>14%</b>
Attending college event	11%	21%	15%	8%	<b>14%</b>
Dropping off/picking up students	5%	12%	12%	6%	<b>9%</b>
Attending conference/camp	3%	6%	5%	0%	<b>3%</b>
Other	5%	16%	17%	38%	<b>22%</b>

Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics

Note that a comparison between these results and those from the Cornell University Economic Impact study should be made cautiously due to differences in approach. First, the above results are for both Ithaca College and Cornell University as opposed to Cornell alone. Secondly, the Cornell study does not include the category of visitors who come to visit family and friends working in colleges—a large proportion of the results shown here. Finally, the definition of a ‘visitor’ is not necessarily the same as was used in the Cornell study—for example, in this study all persons living in Tompkins County were excluded as well as those living outside the county but working in the county or attending school in the county.

## 2.4. Travel Arrangements

Travel arrangements for visitors to Tompkins County include travel planning, mode of transportation, travel party size, and lodging arrangements.

### 2.4.1. Travel Planning

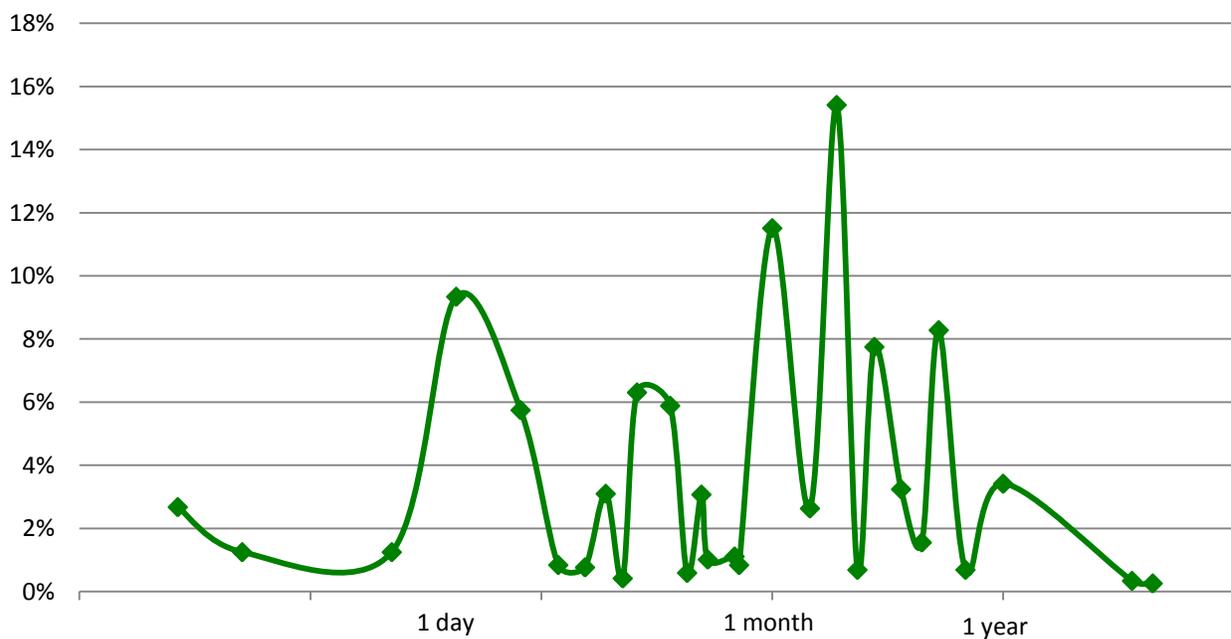
The internet is the most popular resource for travel planning. More than half (54%) of visitors utilized the internet to plan their trips to Tompkins County (Table 2.10). In addition, 19% of visitors utilized acquaintances such as friends and families for travel planning. Relying on previous experience with the area or using no planning resources was done by 27% of visitors. AAA was used by 2% of visitors and 4% used other resources. Note that the sum of percentages here is greater than 100% as some visitors used more than one resource.

<b>Table 2.10: Travel Planning</b>					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Internet	38%	67%	70%	47%	<b>54%</b>
None/Previous Experience	28%	21%	16%	34%	<b>27%</b>
Acquaintances	38%	14%	19%	14%	<b>19%</b>
Printed Materials	3%	7%	11%	11%	<b>8%</b>
AAA	0%	4%	7%	1%	<b>2%</b>
Other	2%	5%	3%	4%	<b>4%</b>

Source: Chmura Economics & Analytics

- Among the visitor segments in Table 2.10, visitors staying with family and friends are most likely to use information from acquaintances for trip planning compared to the other groups. Moreover, only 38% of visitors who stay with family and friends use the internet for trip planning compared with 67% of those staying in hotels and 70% of those using other lodging.
- A higher percentage of day trippers and visitors staying with friends and families use no resources to plan or rely on previous experience compared to those staying at hotels or other lodging.
- First-time visitors are more likely to use the internet for travel research (68%) than repeat visitors (48%).
- Among first-time visitors, internet usage was most popular among the age 45 to 54 cohort (76%) and the 35 to 44 cohort (71%) and least popular among those 65 and older (55%) and 18 to 24 (52%).
- Among first-time visitors, internet usage was higher among those traveling for university- or college-related reasons (75%) compared to other reasons (58%).
- According to surveys conducted at the Ithaca Visitors Bureau, the most often used internet site to research trips to the area was VisitIthaca.com (used by slightly over half of respondents) followed by Cornell.edu and Ithaca.edu (see the appendix A.4.4. for more details).

**Figure 2.6: Advance Time for Decision to Take the Ithaca Trip**

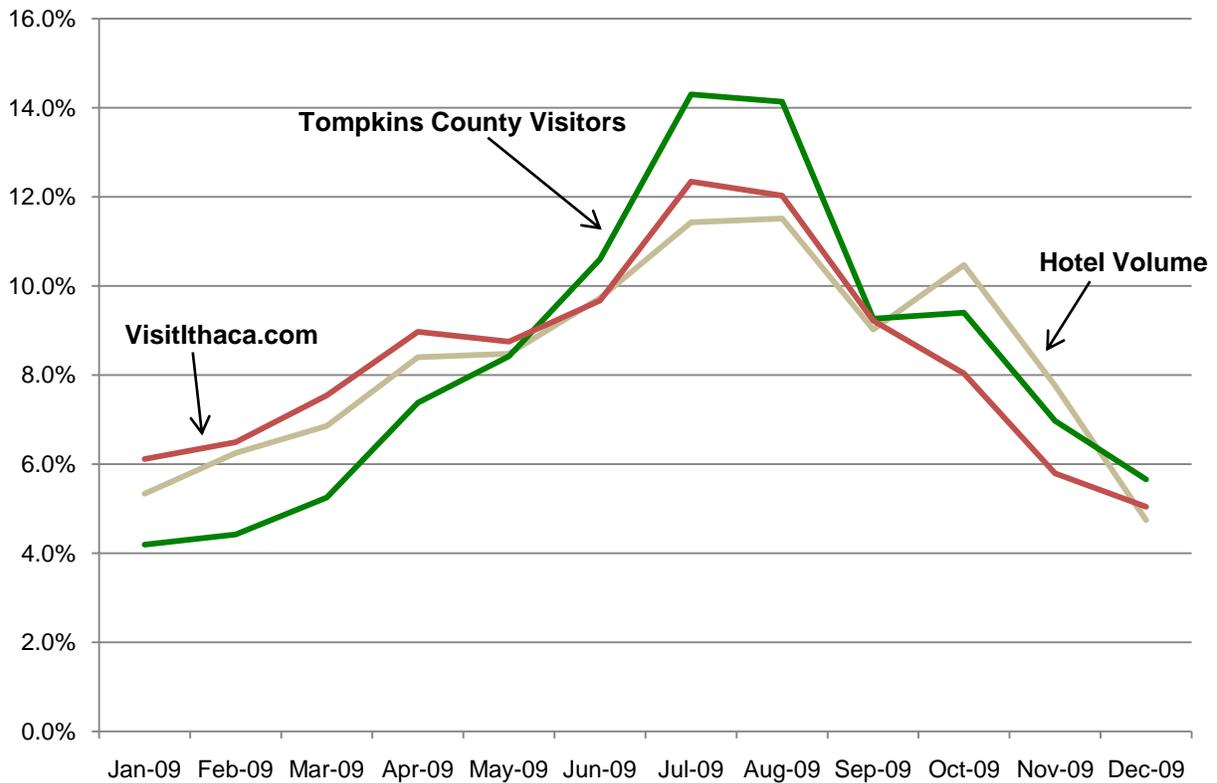


Respondents in the surveys at the Visitor Information Centers provided how far in advance they decided to take their trip into Ithaca. Answers varied from instantaneously to five years. These results were weighted according to the mix of travelers calculated earlier in this section. Based on these revised data, the median planning time was one month, meaning half of the respondents planned one month or less while the other half planned for one month or more. Most frequent planning times were two months (15% of visitors), one month (12%), one day (9%), six months (8%), and three months (8%).

Table 2.11: How Far in Advance the Trip Was Planned	
One Day or Less	15%
Two to Seven Days	17%
Eight to Twenty-Nine Days	13%
One Month	12%
About Two Months	18%
About Three Months	8%
Four to Six Months	13%
Seven to Twelve Months	4%
More than a Year	1%
Total	100%
Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics	

In aggregate, a little less than a third (32%) of visitors decide in advance to take the trip in seven days or less before the trip. An estimated 13% begin planning the trip less than a month in advance but more than a week. Thirty-eight percent make their decision between one and three months prior to the trip. Another 17% plan beginning four months to a year out and the remaining 1% made the decision to travel more than a year before the actual trip.

Figure 2.7: Seasonality of VisitIthaca.com Visitors vs. Tompkins County Visitors in 2009



Even though the decision to make the trip to the Ithaca area was made a month or more in advance by half of the visitors, use of the VisitIthaca.com website<sup>12</sup> did not peak a month before actual visitor volume. Use of the website had a similar seasonality pattern to overall visitor volume, with both peaking in July and August—based on 2009 data. Nevertheless, as a percentage of overall volume, visitors to the county peaked higher in the summer (over 14%) compared to website usage peaking just a little over 12%. The relative use of the website more closely follows hotel visitor volume with the exception of the months of October and November in which hotel volume receives a bump up which is not reflected in the website traffic. The link between hotel and website traffic is not too surprising since the lodging page was usually the most frequented visited web page within the VisitIthaca.com website based on monthly 2009 statistics.

**2.4.2. Mode of Travel**

The vast majority of visitors to Tompkins County travel by automobile (Table 2.12). Overall, 91% of all visitors traveled to the county by automobile, 10%<sup>13</sup> by air plane, and 2% by bus—some using more than one means.<sup>14</sup>

Table 2.12: Modes of Transportation to Tompkins County					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Automobile	82%	86%	93%	99%	<b>91%</b>
Air	18%	18%	7%	1%	<b>10%</b>
Bus	5%	2%	1%	<1%	<b>2%</b>
Other	0%	<1%	2%	1%	<b>1%</b>

Source: Chmura Economics & Analytics

Among the different visitor segments, those staying with families and friends are unique in mode of travel. Only 82% of visitors who stay with family and friends travel by automobile compared to 86% or higher for other overnight groups and 99% for day trippers. Moreover, 5% of visitors who stay with family and friends traveled by bus compared with 2% or less among other groups. This reflects the fact that some of these visitors are students without cars—bus travelers were more likely to be age 34 or younger.

Approximately 22% of Tompkins County visitors include the Ithaca area as part of a larger trip rather than their only destination. This percentage is higher among those staying at hotels and similar establishments (26%) and lower among day trippers<sup>15</sup> (16%) and those staying with family and friends (19%). The top cities also on trip itineraries that included Tompkins County were Syracuse, New York City, Niagara Falls, Boston, and Rochester (see the appendix Section A.1.4. for further details). About 44% of those on a prospective student tour visited Tompkins County as part of a larger trip—and this segment included many of those who also were visiting Boston (presumably visiting one or more school there as well).

<sup>12</sup> Usage of the website here is based on the number of unique visitors as provided by the VisitIthaca.com website stats.

<sup>13</sup> All of those traveling by air did not necessarily use Ithaca Tompkins Regional Airport as some could have flown into another airport and driven to Ithaca. About six and a half percent of all visitors only traveled by air.

<sup>14</sup> See Appendix 1 for more details.

<sup>15</sup> Note that day trippers include not only visitors taking a day trip into Tompkins County from their home residences, but those passing through as well as those lodging outside Tompkins County.

### 2.4.3. Travel Party and Length of Stay

The average traveling party to Tompkins County consists of 2.9 people (Table 2.13) including 2.4 adults and 0.6 children under 18. The average travel party for those on a day trip is 3.1 people.

The average visitor (including day trippers) stays in the county for 1.4 nights or 2.2 days. Visitors staying with family and friends stay an average 2.4 nights<sup>16</sup> per visit compared to 2.1 nights for those at hotels and similar accommodations. The average overnight visitor stays in the county for about 2.3 nights.

Table 2.13: Travel Party Size and Length of Stay					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Travel Party Size					
Adults	1.8	2.6	3.0	2.3	<b>2.4</b>
Children (under 18)	0.4	0.5	0.7	0.7	<b>0.6</b>
Total	2.2	3.0	3.7	3.1	<b>2.9</b>
Length of Stay					
Nights	2.4	2.1	2.7	0.0	<b>1.4</b>
Days	3.0	2.6	3.3	1.0	<b>2.2</b>
Note: Figures may not sum due to rounding. Source: Chmura Economics & Analytics					

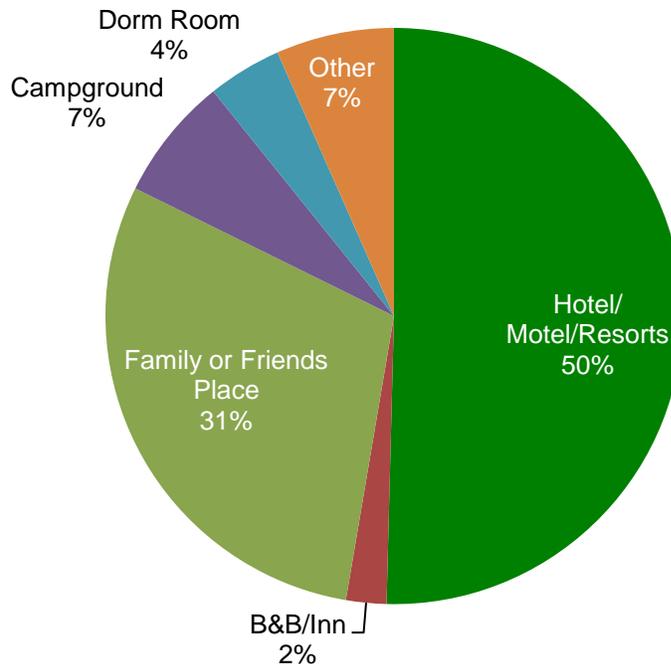
- Travel parties are larger among general travelers (3.2) compared to those traveling for a university- or college-related purpose (2.7). However, general travelers stay a fewer number of nights on average (1.1) compared to the university- or college-related travelers (1.7).
- Travel parties are larger from June to August (3.3) compared to the remainder of the year (2.7). From June to August, travelers also spend more nights in the county on average (1.6) compared to other times in the year (1.3).
- Business travelers have a higher percentage of single-person traveling parties (27%) than leisure travelers (14%). Business travelers average a stay of 1.9 nights compared to 1.3 nights for leisure travelers.
- Travelers age 18 to 24 have a higher percentage of single-person traveling parties (36%) compared to all other travelers (15%).
- While the average length of stay was low for travelers from New York State (0.9 nights) and other US Northeast states (1.4), the average length of stay was more than 2 nights for travelers from all other regions: Canada (2.2), US South (2.4), US Midwest (2.4), US West (2.5), and non-Canadian foreign (4.1).

<sup>16</sup> This figure is taken from the intercept surveys. According to the household telephone surveys, the average length of stay was about four and a half nights. Further research is needed to explore the reason for the difference in these two estimates, but the intercept survey figure is used here for two reasons: (1) since the telephone survey included visitations that were purely social and/or family related, it is not as closely representative of the type of visitor involved in tourism-related activities; and (2) for data consistency purposes when visitor segment breakouts are used that are only able to be derived from the intercept data.

### 2.4.4. Lodging Arrangements

Of all visitors to Tompkins County, 37% are day trippers. For visitors who overnight in Tompkins County, 50% stay in a hotel, motel, or resort, 31% stay with family and friends, and 2% stay in a bed and breakfast or inn. In addition, 7% stay at a campground and 4% stay in dorm rooms.

**Figure 2.8: Lodging Arrangements of Tompkins County Visitors (Excluding Day Trippers)**



Some of the day trippers to Tompkins County are visitors who stay overnight outside the county. In the intercept survey, about half of these visitors stayed at a hotel or similar establishment and more than a quarter stayed with family or friends. When these visitors were asked why they did not lodge within the county, only a small number cited reasons related to lodging facilities in Tompkins County: excluding those lodging with family or friends, 5% said everything was booked and 3% said the cost was too high in the county. Mainly, visitors stayed elsewhere because their lodging was closer to other destinations on their itinerary or for miscellaneous reasons such as how far they were able to travel the day before or just passing through the county.

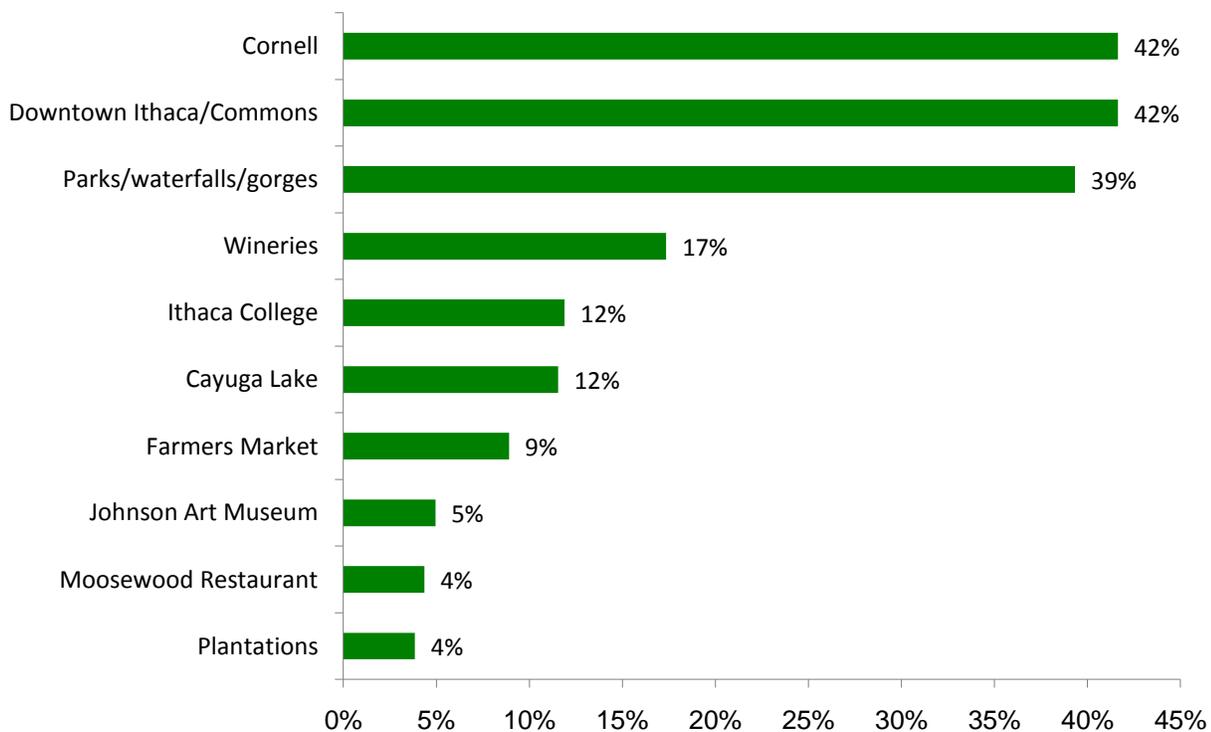
Table 2.14: Reasons Day Trippers Overnight in Lodging Establishments Outside of Tompkins County (Excluding Those Staying with Family or Friends)	
Lodging Closer to Other Trip Destinations	60%
Free Lodging Available Elsewhere	5%
Everything in Tompkins County Booked	5%
High Cost in Tompkins County	3%
Other	28%
Note: Numbers may not sum to 100% due to rounding.	
Source: Chmura Economics & Analytics	

(For characteristics of Tompkins County households hosting overnight guests, see the appendix Section A.2.3. For the characteristics of students hosting out-of-town guests, see Section A.3.3.)

## 2.5. Activities in Tompkins County

While in Tompkins County, visitors participate in a wide range of activities. Respondents in the intercept surveys were asked to list tourism activities that they had done or planned to do on their trip in Tompkins County. Multiple selections are allowed and so the percentages shown below sum to more than 100%. The top activities among visitors were going to Cornell, visited by 42% of all travelers, and spending time at downtown Ithaca and the Commons, also visited by 42% of travelers. These activities are closely followed by visitation of parks, waterfalls, and gorges, with 39% of visitors performing that activity. There is a large gap in popularity following the top three attractions and the next-most popular destinations which are the wineries, Cayuga Lake, Ithaca College, and the Farmers Market. These four activities attract between 9% and 17% of visitors each. Following these in popularity are several science and arts attractions such as the Johnson Art Museum and the Cornell Plantations as well as others not listed here such as the Museum of the Earth, the Science Center, and the State Theater.

**Figure 2.9: Activities in Tompkins County**



The top three attractions are the same among all different visitor segments (Table 2.15). A large and overarching difference in activity patterns among visitor segments is related to the fact that those staying at hotels and similar establishments were more likely visiting Tompkins County for university- or college-related reasons. Therefore, these visitors were more likely to visit the Cornell and Ithaca College campuses while those on a day trip or staying with family or friends were more likely to visit other tourist attractions such as the parks.

<b>Table 2.15: Top Ten Visitor Activities</b>					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
Cornell	44%	59%	43%	25%	<b>42%</b>
Downtown Ithaca and the Commons	49%	44%	43%	36%	<b>42%</b>
Parks, waterfalls, and gorges	48%	33%	54%	37%	<b>39%</b>
Wineries	20%	19%	26%	12%	<b>17%</b>
Ithaca College	9%	17%	12%	9%	<b>12%</b>
Cayuga Lake	16%	12%	16%	8%	<b>12%</b>
Farmers Market	17%	7%	9%	6%	<b>9%</b>
Johnson Art Museum	7%	5%	7%	4%	<b>5%</b>
Moosewood Restaurant	7%	4%	4%	4%	<b>4%</b>
Plantations	6%	3%	9%	2%	<b>4%</b>
Source: Chmura Economics & Analytics					

The following is a summary of correlations found between visitor activities and other characteristics in the intercept surveys (see Section A.1.5 for more details):

- State parks, waterfalls, and gorges – more likely visited by general travelers than those traveling for a university- or college-related purpose; more likely visited by first-time visitors than repeat visitors; among general travelers,<sup>17</sup> more likely visited by visitors aged 18 to 54 than those 55 and up; among general travelers, more likely visited by parties with children under 18 than those without; more likely visited by leisure than non-leisure travelers; more likely visited among summer travelers than winter; among general travelers, likelihood of visiting the state parks was fairly even across all household income groups.
- Downtown Ithaca and the Commons – virtually no difference in likelihood of visitation between general travelers and those traveling for a university- or college-related purpose; more likely visited by those aged 18 to 35 than those 65 and over; more likely visited by leisure travelers than non-leisure; visitation less likely in the winter; visitation by parties with children under 18 not significantly different from parties without children.
- Cornell University and Ithaca College – though overwhelmingly visited by those on university- or college-related visits, at least one of the campuses was also visited by about one sixth of survey respondents who were visiting for other reasons; much more likely visited by parties with one child under 18; more likely visited by first-time visitors to Tompkins County.
- Wineries – more likely visited by general travelers than those visiting for a university- or college-related purpose; among general travelers, more likely visited by parties without children under 18 than those with children; among general travelers, more likely visited by first-time visitors than repeat visitors; among general travelers, variation by age cohort was not significant; more likely visited by those attending a wedding during their visit; among overnight visitors, more likely visited by those staying at a B&B than lodging elsewhere.

<sup>17</sup> General travelers is defined here as those traveling for a purpose not related to a college or university.

## 2.6. Spending Patterns

Tourist spending in Tompkins County is estimated to be \$185 per person per trip based on 2009 figures. Of this amount, \$65 is spent on food and drink, \$52 on lodging, and \$47 on shopping. Other spending items include local transportation (\$12 per visitor), entertainment & attractions (\$5 per visitor), and other items (\$4 per visitor). Among the four visitor segments in Table 2.16, day trippers spend an average of \$51 per visit, the lowest of the groups, while overnight visitors spend an average of \$265 per person per trip. Visitors staying with family and friends spend nothing on lodging, but their average spending is \$172 per visitor, much larger than day trippers since they stay in the county longer and thus spend more money on food, drink, and shopping.

**Table 2.16: Average Spending Per Visitor Per Trip in Tompkins County**

	Stay with Family Friends	Stay in Hotels	Other Lodging	Day Trippers	Average All Visitors	Average Overnight Visitors
Food & Drink	\$86	\$99	\$81	\$19	\$65	\$92
Lodging	\$0	\$136	\$71	\$0	\$52	\$83
Shopping	\$59	\$71	\$43	\$21	\$47	\$63
Local Transportation	\$15	\$20	\$17	\$3	\$12	\$18
Entertainment & Attractions	\$8	\$5	\$5	\$3	\$5	\$6
Other	\$3	\$3	\$0	\$5	\$4	\$3
Total	\$172	\$335	\$216	\$51	\$185	\$265

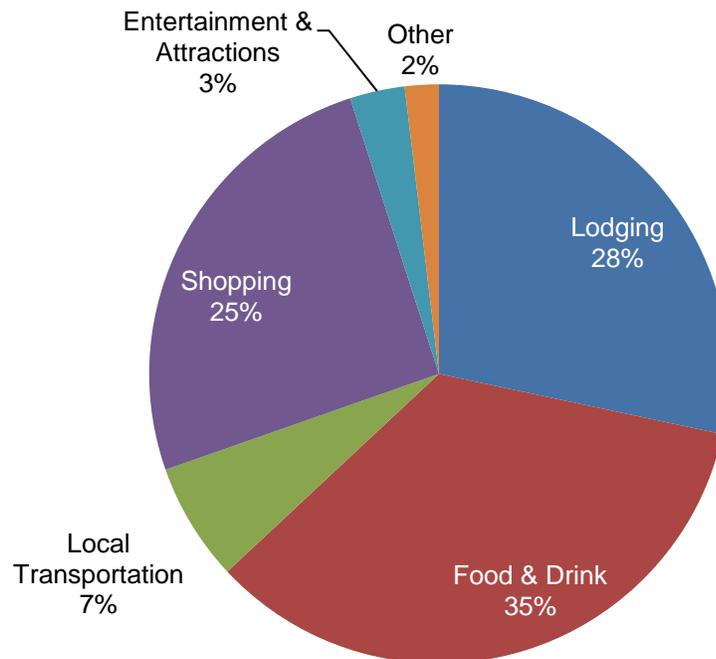
Note: Numbers may not sum due to rounding. Source: Chmura Economics & Analytics

The total number of visitors to Tompkins County in 2009 is estimated at 843,135. If each of these visitors spent an average of \$186 dollars per visit, the total visitor spending in Tompkins County would be \$156 million. This number is smaller than the total tourism spending estimates by Oxford Economics of \$161 million in 2007 and \$170 million in 2008. The reason for the difference in estimates is mainly attributable to the economic recession and the decline in consumer spending in 2009.

Due to the national recession, national tourism industry sales in the first three quarters of 2009 were 9.5% lower than the same period in 2008.<sup>18</sup> The Tompkins County tourism industry may not have experienced as large drop in total sales as in the nation due to the moderating influence of Cornell University and Ithaca College; these schools bring a large number of visitors to the county, an effect that does not necessarily slow during a recession. Nevertheless, assuming a downturn in Tompkins County visitor spending of 9.5% in 2009, total 2008 visitor spending is estimated to have been \$173 million.

The detailed spending pattern of visitors to Tompkins County is presented in Figure 2.10. Of all tourism spending in Tompkins County, the largest component is for food and drink, accounting for 35% of total visitor spending, followed by 28% for lodging, and 25% for shopping. By comparison, other studies have found similar rankings of visitor spending though with slightly different percentages. For example, Oxford Economics estimates that food, lodging, and shopping account for 26%, 24% and 21% of total tourism spending, respectively. These percentages are lower than those shown here as transportation spending accounted for 21% of total spending in the Oxford Economics estimate, larger than the Chmura estimate of 7% which included only in-town transportation expenses.

<sup>18</sup> National tourism data are per the Bureau of Economic Analysis.

**Figure 2.10: Spending Pattern of Visitors to Tompkins County**

Though food and drink is the largest expenditure for overall visitors to Tompkins County, among those staying at hotels and similar establishments, lodging is the top expenditure and accounts for approximately 41% of spending. Among these visitors, food and drink is the second largest spending category, accounting for 30% of expenditures.

Visitors staying in hotels and similar establishments in Tompkins County spend more on average than other visitors. Those staying at hotels spend close to twice as much per person per visit than those staying with family or friends and over six times as much per person per visit than day trippers. Overall, visitors staying in hotels and similar lodging establishments account for 33% of the visitors but approximately 59% of the total visitor spending in Tompkins County. Among the other categories of visitors, those staying with family and friends account for about 18% of total spending, day trippers account for 11% of total spending, and those staying overnight with other lodging arrangements (including camping) account for 12% of total tourism spending in the county.

The following correlations were found in the intercept survey between spending and visitor characteristics (see Section A.1.7 for further details):

- As would be expected, average spending of Tompkins County visitors is higher from visitors from households with higher incomes. Furthermore, as household income increases with age among working individuals, likewise does visitor spending.
- Those traveling for a university- or college-related purpose spent more on average than general travelers per person per day. Visitors dropping off or picking up a student spent more than those on a prospective student tour.
- First-time visitors spent similarly to repeat visitors on a per person per day basis.
- Spending per person per day varied inversely with the size of the traveling party—meaning, in general, the smaller the traveling party, the higher the per person per day spending.
- Business travelers average higher per person per day spending than leisure travelers.

## 2.7. Customer Satisfaction and Loyalty

This section reports the overall satisfaction of visitors with their trips to Tompkins County.

### 2.7.1. Overall Satisfaction

Visitors to Tompkins County have an extremely high level of satisfaction with their trips as 88% of visitors are very satisfied with their trips (Table 2.17) and another 11% are somewhat satisfied. Only 1% of visitors are somewhat dissatisfied and less than 1% very dissatisfied.

Table 2.17: Overall Satisfaction					
	Stay with Family Friends	Stay in Hotels	Other Lodging	Day Trippers	Average
Very Satisfied	93%	85%	90%	88%	<b>88%</b>
Somewhat Satisfied	6%	14%	9%	12%	<b>11%</b>
Somewhat Dissatisfied	1%	0%	1%	0%	<b>1%</b>
Very Dissatisfied	1%	0%	0%	0%	<b>&lt;1%</b>
Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics					

Visitor satisfaction is high across all visitor segments though visitors staying in hotels and similar lodging establishments were less likely to say there were very satisfied (85%) compared to those visitors staying with family and friends (93%) or day trippers (88%).

In an open-ended question, visitors were asked exactly which aspects of the Ithaca area they enjoyed and did not enjoy the most. Aspects enjoyed that were most cited by respondents were: the natural scenery; state parks, waterfalls, and gorges; Cornell; downtown; dining, restaurants, and food; and friendly people. Aspects that were not enjoyed were cited less frequently, but these items were headed by: roads and traffic; weather; accommodations; parking; downtown and the Commons; and construction.

### 2.7.2. Loyalty

High visitor satisfaction leads to a large number of repeat visits to Tompkins County. It is estimated that 69% of visitors to Tompkins County are repeat visitors with 28% visiting Tompkins County ten or more times over the last five years (Table 2.18) and 12% visiting the area between five and nine times over the same period. Day trippers and those staying with family and friends are more likely to be repeat visitors. For example, 45% of day trippers have visited Tompkins County ten or more times in the last five years. In contrast, 41% of visitors staying in hotels and similar lodging establishments are first-time visitors to the county.

<b>Table 2.18 Visit Frequency</b>					
	Stay with Family/Friends	Stay in Hotels, etc	Other Lodging	Day Trippers	Average
<b>First-Time Visitors</b>	25%	41%	46%	20%	<b>31%</b>
<b>Visits in the Last Five Years (including Current Trip)</b>					
1	32%	51%	52%	27%	<b>38%</b>
2	9%	12%	13%	9%	<b>10%</b>
3-4	16%	11%	12%	8%	<b>11%</b>
5-9	16%	12%	10%	12%	<b>12%</b>
10+	27%	14%	13%	45%	<b>28%</b>
Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics					

- The percentage of first-time visitors is highest from June to August (36%) compared to other times of the year (27%).
- Those traveling for a university- or college-related purpose included a higher percentage of first-time visitors (38%) than general travelers (24%).
- First-time visitors are more commonly found among those age 18 to 44 (38%) than those 45 and up (26%).
- In the intercept surveys, first-time visitors were most commonly found at university and college locations and least often found at downtown locations.
- In the intercept surveys, 4% of respondents reported one hundred or more trips into the Ithaca area over the last five years. These respondents were dominated by those living close to Tompkins County (led by residents of Broome, Cortland, Tioga, Chemung, Cayuga, and Onondaga).

High visitor satisfactions also leads to a high probability of future visits as over 80% of visitors say they would definitely or probably come back in the next five years for a leisure trip (Table 2.19). Based on the intercept survey results, nearly two-thirds (65%) of the visitors would definitely come back to the Ithaca area while about 7% of visitors probably or definitely would not come back to the county for a leisure trip.

<b>Table 2.19: Possible Return in the Next Five Years for a Leisure Trip</b>					
	Stay with Family Friends	Stay in Hotels	Other Lodging	Day Trippers	Average
Definitely	76%	48%	59%	76%	<b>65%</b>
Probably	13%	21%	17%	12%	<b>16%</b>
Might/Might Not	7%	18%	13%	10%	<b>12%</b>
Probably Not	2%	11%	7%	2%	<b>5%</b>
Definitely Not	1%	2%	4%	0%	<b>2%</b>
Note: Numbers may not sum to 100% due to rounding. Source: Chmura Economics & Analytics					

Among all visitor segments, those staying in hotels have the least probability of returning in the next five years. Only 48% said they would definitely come back for a leisure trip compared with 65% overall. This can be related to their purpose of visits. People staying with family and friends have ties in the county which makes them more likely to come back. Day trippers include many residents of the surrounding regions who are more likely to come back. Those staying in hotels do not have these ties to the county and are also more likely to be business travelers.

To see this point further, Table 2.20 presents the probability of returning for leisure visits in the next five year by visitor purpose. Seventy-three percent of the leisure travelers reported they would definitely return for a leisure visit in contrast to 32% of business travelers. A lot of the business travelers chose ‘probably’ and ‘might/might not’ showing uncertainty about their future plans. For university- or college-related visitors, a mix of business and leisure visitors, 53% reported that they would definitely come back for a leisure visit.

<b>Table 2.20: Possible Return in the Next Five Years</b>				
	<b>Business</b>	<b>Leisure</b>	<b>Both</b>	<b>College/University Related</b>
Definitely	32%	73%	68%	53%
Probably	23%	14%	12%	19%
Might/Might Not	29%	8%	15%	18%
Probably Not	13%	4%	3%	8%
Definitely Not	3%	1%	2%	2%
Source: Chmura Economics & Analytics				

Overall, the likelihood of returning for a leisure trip is inflated by the large number of repeat visitors, that is, those who may already be in the habit of returning. Nevertheless, among first-time leisure visitors, 38% said they would definitely come back for a leisure trip within the next five years and another 30% said they probably would come back. Just 12% of first-time leisure visitors said they would probably or definitely not return within five years for another leisure visit. Among first-time business visitors, 15% said they would definitely come back for a leisure visit within the next five years another 30% said they probably would.



## 3. Methodology

### 3.1. Background

Tompkins County, New York, is located in the central part of the Finger Lakes region in upstate New York. Situated at the southern tip of Cayuga Lake, Tompkins County encompasses 465 square miles of territory and had a population just over 100,000 in 2006-2008,<sup>19</sup> with the city of Ithaca as its urban center. Tompkins County has a unique blend of both natural and cultural resources. Tompkins County and the Finger Lakes region have lakes, waterfalls, and vineyards that are excellent for outdoor activities such as hiking, biking, skiing, wine tasting, and fishing. Home to Cornell University and Ithaca College, Tompkins County also possesses a wide range of cultural resources and activities including museums, science centers, and college sports. Tompkins County is known to visitors as an excellent place to stay while exploring the upstate Finger Lakes region, with a successful pedestrian mall and a thriving downtown area full of boutique shops, galleries, and restaurants offering a variety of cuisines.<sup>20</sup>

Tompkins County has experienced growth in tourism in recent years. Oxford Economics estimated total tourist expenditures to be about \$170 million in 2008, up from \$125 million just three years prior. The tourism sector is also estimated to create over 2,000 jobs in the county.<sup>21</sup> In addition, lodging capacity has increased with the opening of a variety of national chain properties as well as independently-operated establishments. Tourism is playing an important and growing role in the local economy.

Since October 1989, the Tompkins County Legislature has supported its tourism industry through collection of a room occupancy tax. The 18-member Strategic Tourism Planning Board (STPB), appointed by the Tompkins County Legislature, is charged with making recommendations for the county's tourism development effort using these funds. STPB's mission is to provide oversight and strategic direction for tourism initiatives that promote economic development and enhance the quality of life in the county.

STPB established overarching strategies for tourism development for the county. The strategies aim to increase market share through better targeted and expanded marketing. From 2005 to 2010, the goal of the strategies is to double the number of inquiries for visitor information. An integral part of the strategies is to develop an ongoing market analysis program to refine the understanding of the current and potential tourist markets. Yet specific and regularly generated statistics profiling visitors, measuring economic impacts, and documenting trends have not been available. In order to continue to make informed decisions supporting the tourism sector and the county economic development, the STPB had a need to develop a comprehensive visitor profile and establish a viable, focused, and on-going visitor profile program. As a result, Chmura Economics & Analytics, LLC (Chmura) was contracted to conduct this study to profile visitors to Tompkins County. This profile will serve as a benchmark for the future on-going visitor study effort.

### 3.2. General Methodology Approach

A review of current literature regarding tourism economic impact and visitor profiles indicates that all visitor profile studies apply survey methodology to understand visitor demographic, trip planning, and trip behavior. However,

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<sup>19</sup> Source: American Community Survey: 2006-2008. Source: US Census.

<sup>20</sup> Source: Tompkins County, NY, 2005-2010 Strategic Tourism Plan, Strategic Tourism Planning Board, May 2005.

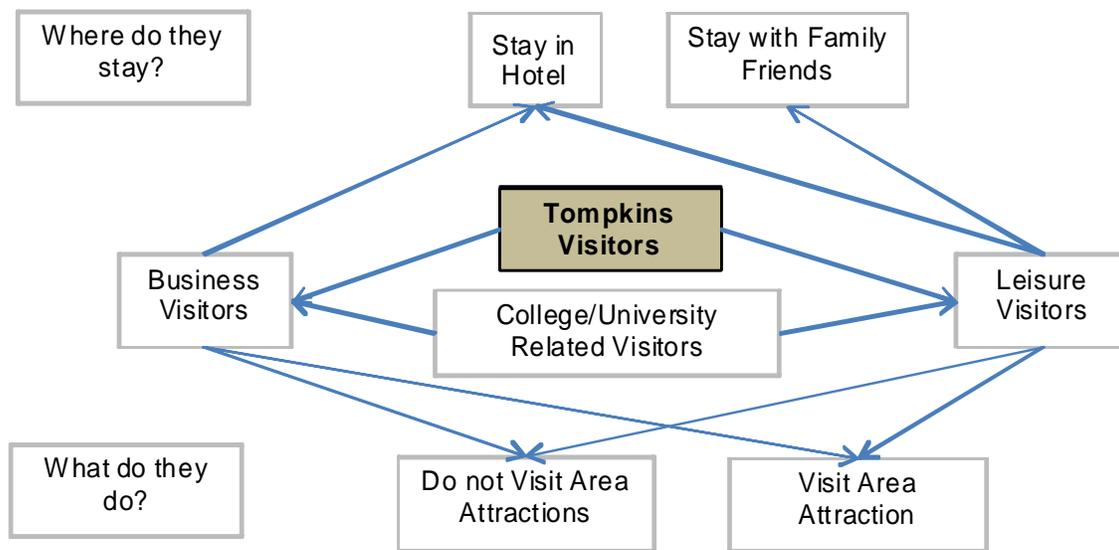
<sup>21</sup> Source: Oxford Economics

there are significant differences in the survey approaches taken. Some prior visitor profile studies (such as for Napa County, California; Seattle, Washington; and Norfolk, Virginia) implemented visitor intercept surveys.<sup>22</sup> Though the visitor intercept survey is a core component of the Chmura approach, other surveys were also used based on the unique needs of the study.

A visitor to Tompkins County is defined as anyone in Tompkins County that does not live, work, or attend school in the county. The best approach for an accurate visitor profile is to conduct a survey with people from a random sample from all visitors to Tompkins County over the course of one year. However, visitors are a highly mobile and fluid population. Drawing a representative sample can be difficult because there is no master visitor list to draw from. No government agency or civil organization keeps a list of all visitors to Tompkins County. The Convention and Visitors Bureau has expected conference volume data, but not contact information for individuals. The Visitors Center may collect names of tourists who stop in, but this sample is not typical of all visitors. Hotels guests or airline passengers' lists are extremely difficult to obtain as well as not being completely representative of all visitors.

The following diagram illustrates the various segments of visitors to Tompkins County and the best ways to reach them. Visitors to Tompkins County are classified as business or leisure visitors. Due to the special role of colleges and the university in the county, a special category of "college/university related" visitors are also tracked. Visitors are usually concentrated in two places--- lodging establishments and attractions. As Figure 3.1 shows, visitor intercept surveys at lodging and attractions may not capture all visitors. Missing visitors are staying with family and friends, and are in the county for events such as weddings, funerals. They do not stay in hotels or motels, and they do not visit attractions. Furthermore, those on a day trip into the county will neither stay at hotels nor with family or friends in the county.

**Figure 3.1: Tompkins County Visitors**



<sup>22</sup> Sources: Napa County Visitor Profile Study and Napa County Economic Impact Study, 2006, prepared by Purdue University Tourism and Hospitality Research Center. Market Profile and Economic Impact of Seattle and King County Visitors, 2007, prepared by CIC Research, Inc. Profile and Economic Impacts of Visitors to Norfolk, Virginia, 2006, prepared by Center for Tourism Research and Development, University of Florida.

For this study, visitor intercept surveys were conducted in lodging facilities and tourism attractions such as Cornell University and Ithaca College, state parks, and downtown Ithaca. In addition to visitor intercept surveys, a random household survey throughout Tompkins County and a student survey of Cornell and Ithaca College students were conducted. The household and student surveys were designed to capture information regarding the number and characteristics of out-of-town guests who stay overnight with friends and relatives in Tompkins County.

Though all three of these surveys provide valuable information regarding visitors to Tompkins County, none are sufficient within themselves to provide a complete visitor profile. Combining these three, however, results in a full picture of what a typical visitor to Tompkins County is like.

### 3.3. Survey Methodology

Since surveys are the center piece of the Tompkins County Visitor Profile study, this section provides more details regarding Chmura's approach on the process and contents of the surveys.

First, to get expert community feedback on the project methodology and focus before these items were decided upon, in September 2008 Chmura held several meetings with members of the Tompkins County Tourism Board and several focus groups. The focus groups included hoteliers, representatives for higher education, public officials, park officials, and representatives for area attractions. A teleconference with restaurateurs was also held in October. These focus groups were in depth discussions on the value of certain questions; how questions would be asked; the value of certain survey approaches (such as a household survey); where, how, and when surveys might take place; and the type of segmentation of results that would be useful to see in the final report.

#### 3.3.1. Number and Timing of Surveys

Tourism is a highly seasonal industry. A snapshot at a particular time of year may not be able to capture the complete profile of visitors to a county. This is especially true for Tompkins County, home of Cornell University and Ithaca College. The number of visitors to Tompkins County not only reflects the natural season, but also the academic season. The starting of the new academic year and graduation events brings many visitors to the county in late summer and spring. Various festivals and events also cause variations in visitor volume and type. To capture seasonality for the visitor profile, Chmura conducted monthly visitor intercept surveys over the course of a year from December 2008 to November 2009.

For the household and student surveys, Chmura conducted surveys at one point in time, but questions were asked about visitors over the course of the past year.

#### 3.3.2. Location of Surveys

To capture the full extent of visitors to Tompkins County, three surveys were utilized:

1. Visitor intercept surveys at known tourist attractions and hotels - The number and the locations of tourist attractions at which to conduct surveys were determined through focus groups and a review of previous studies. Chmura selected the following attractions for intercept surveys: state parks, downtown and the Commons, Cornell University, Ithaca College, various museums, and others. Surveys at hotels provide additional information on visitors to Tompkins County, especially those who do not visit tourist attractions such as business visitors or visitors of friends or family. Surveys were conducted at the following lodging establishments: Hilton Garden Inn, Best Western, Statler Hotel, Hampton Inn, La Tourelle, Courtyard Marriott, Holiday Inn, Ramada Inn, Clarion Hotel, Comfort Inn, and Country Inn and Suites.
2. Household survey of Tompkins County - This provided information on visitors who did not visit any attractions and who stayed with family and friends. A telephone survey of Tompkins households was

conducted for this purpose using a stratified random sampling technique to obtain a fair sample according to age and income.

3. Student survey of Tompkins County - Since the household survey misses students, a significant population in the Ithaca area, a separate student intercept survey was administered at Cornell University and Ithaca College to ask about visitors who stay overnight with students.

In addition to these primary surveys, two additional surveys took place: self-administered surveys of visitors to the Visitors Center and an email survey of innkeepers.

### 3.3.3. Contents of the Surveys

The surveys were designed to gather visitor information in the following categories:

1. Who are the visitors? Place of residence, household types and income, and type of travelers (business, leisure, or university-related).
2. Why are the visitors here? Primary motivators and purposes of the visits.
3. Booking process: what travel planning resources used.
4. Visitor activities: length of stay and attractions visited.
5. Visitor spending: lodging, food and drink, entertainment, shopping, transportation.
6. Visitor satisfaction.

In addition, each survey asked specific questions to develop a complete visitor profile. For visitor surveys at attractions, questions were asked whether they stayed in a Tompkins County hotel, stayed with family or friends in Tompkins County, made a day trip, or stayed outside Tompkins County. In visitor surveys at hotels, questions were asked whether they visited any area attractions. In the household and student surveys, questions were asked about whether the guests visited any attractions in Tompkins County.

### 3.3.4. Survey Arrangement and Sample Size

From December 2008 through November 2009, intercept surveys with visitors were conducted throughout Tompkins County. For the purpose of the survey, people who live, work, or attend school in the county were not considered visitors. Furthermore, in order to capture information from travelers at the end of their trip rather than at the beginning, interviews were only conducted with tourists who would be ending their visit to the area within the next 24 hours.

The interviews were conducted by WB&A Marketing of Ithaca, New York. Interviewees were instructed to conduct the data collection in a respectful and no-pressure manner so as to not agitate or offend any visitors. Since the interviews were collected in public and possibly crowded locations, certain sensitive questions (those regarding age and household income) were answered with the aid of a letter-coded card so that respondents could answer these questions discretely with a letter response. The resultant sample of 1,503 responses yields a sampling error of approximately  $\pm 2.5\%$  with 95% confidence.

The household survey was conducted by phone over a random selected population in Tompkins County. The survey was conducted in January and February 2009.<sup>23</sup> Successful contact was made with persons at 418 households, with 231 participating for a 55.3% participation rate. Among these responses, eight were removed from

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<sup>23</sup> The survey was conducted by WB&A of Ithaca, New York under the direction of Chmura Economics & Analytics.

the final sample due to incomplete responses on crucial questions regarding overnight visitors. The resultant usable sample of 223 responses yields a sampling error of  $\pm 6.5\%$  with 95% confidence.

The student survey was conducted in late April and early May 2009 via intercept interviews.<sup>24</sup> A third of the interviews were conducted in May with the rest in April. The interviews took place on campus (accounting for 63% of the interviews), in downtown Ithaca (34%), and at Stewart Park (3%). Only students at least 18 years old were allowed to be interviewed. One hundred and four responses were gathered. One response was removed from consideration as an outlier and two other responses were removed to prevent overlap with the household survey analysis as these students lived in their own permanent residence in Tompkins County. The resultant sample of 101 responses yields a sampling error of approximately  $\pm 9.7\%$  with 95% confidence.

### 3.4. Secondary Data Analysis

While visitor intercept surveys, household, and student surveys were the primary means of data collection, other secondary data regarding the tourism industry in Tompkins County were also analyzed. These data provided a tourism background of Tompkins County and to ground the findings of the current study.

The following secondary data were analyzed:

1. Oxford Economics Study on tourism impact in Tompkins County
2. Smith Travel Research on hotels and motels in Tompkins County
3. Tompkins County room tax revenues
4. State Park Service data on park attendance
5. Past study on Cornell University visitors
6. Past survey on Discovery Trail conducted by Cornell University
7. Past survey on downtown Ithaca visitors
9. Past study in Grassroots Festivals
10. Past survey on Finger Lake visitors

### 3.5. Analysis of Survey Data

To develop a profile of the visitors to Tompkins County, Chmura combined the visitor information from the household, students, and visitor intercept surveys. Each characteristic of the Tompkins County visitor was calculated as a weighted average of the results from the above three surveys. The following example illustrates the process. Suppose we are calculating average size of the travel party to the county. The household survey indicates that average travel party has 2.5 people. This variable is 1.4 in the student survey, 3.0 for visitors staying at hotels and similar establishments, 3.7 for visitors with other lodging arrangements (such as campgrounds and dorm rooms), and 3.1 for day trippers. In addition, based on survey responses and sampling data, Chmura estimated that 16% of Tompkins County visitors stayed with family households in 2008, 3% of Tompkins County visitors stayed with a college student, 33% of visitors stayed in a hotel or similar establishment, 37% were day trippers, and 11% used other lodging arrangements. As a result, the average travel party size of Tompkins County visitors is calculated as a weighted average:

$$(16\% * 2.5) + (3\% * 1.4) + (33\% * 3.0) + (37\% * 3.1) + (11\% * 3.7) = 3.0$$

<sup>24</sup> The survey was conducted by WB&A of Ithaca, New York under the direction of Chmura Economics & Analytics.

Thus, it is concluded that the average size of the travel party to Tompkins County is 3.0 persons.

In the cases where some questions were asked in the visitor intercept survey, but not in the household or student survey, Chmura used the value from a subgroup of the visitor intercept surveys (such as those staying with family and friends).<sup>25</sup>

University- and college-related visitors are of particular interest to the Strategic Tourism Planning Board. In presenting the visitor profile for Tompkins County, data are shown separately for this group for this reason.

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<sup>25</sup> Visitors in the household survey also include a small number of visitors who stay with family and friends but do not visit attractions, which marks this sample as different from the intercept survey subgroup that stayed with family or friends. Thus, the characteristics from visitor intercept survey may not exactly represent this group of visitors, but the size of this subgroup is small and so the total impact on the weighted overall results is slight.

## 4. Secondary Data Analysis

This section analyzes other secondary data regarding the tourism industry in Tompkins County. These data provide background on tourism in Tompkins County.

### 4.1. Overall Tourism Industry in Tompkins County

Based on estimates by Oxford Economics, the size of the tourism industry in Tompkins County, measured by total sales (revenue) of all businesses engaged in tourism, was \$170.3 million in 2008 (Figure 4.1). The size of the tourism industry has been increasing the past few years. From 2005 to 2006, the tourism industry expanded by 19.3%. It further expanded by 8.2% from 2006 to 2007 and 6.0% from 2007 to 2008. The slowing in tourism growth in Tompkins County may be related to overall economy, not Tompkins County alone. As a comparison, the total tourism industry in the State of New York grew 7.2% from 2005 to 2006, 8.3% from 2006 to 2007, and 4.0% from 2007 to 2008.

In 2008, as the national economy entered the recession, total tourism sales in Tompkins County continued to expand. Though it grew at a slower pace than before, it still outpaced the state average growth in the New York. As will be discussed in the latter part of this report, one reason that tourism in Tompkins County is more resilient than other regions is that 40% of its visitors are university and college related. These university- and college-related visitors provide a steady visitor base for Tompkins County as their activities are less vulnerable to economic downturns than other attractions such as amusement parks, resorts, and historical sites.



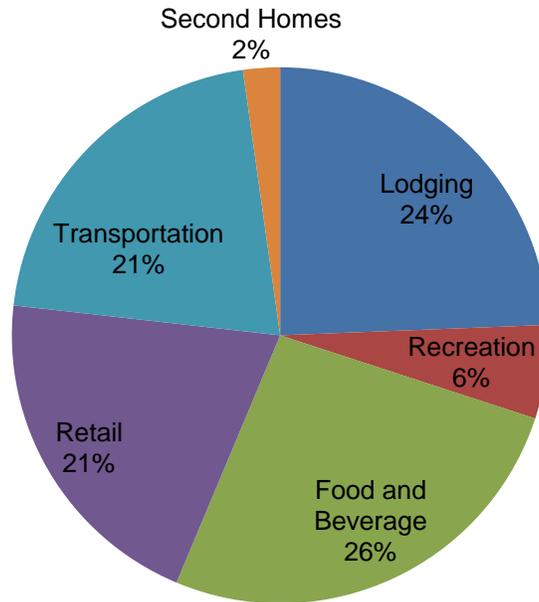
Source: Oxford Economics

According to Oxford Economics data, the largest direct sales component in the Tompkins County tourism industry is food and beverage, accounting for 26% of total tourism sales, followed by 24% for lodging, 21% for transportation, and 21% for retail (Figure 4.2). This spending pattern is very similar with the state average, except



that lodging (28%) is the largest spending category in the state, followed by food and beverage (22%), transportation (21%), and retail (20%). The higher percentage of state tourism spending on lodging may be affected by higher lodging cost for New York City, where average hotel room rates are several times higher than other parts of the state.<sup>26</sup>

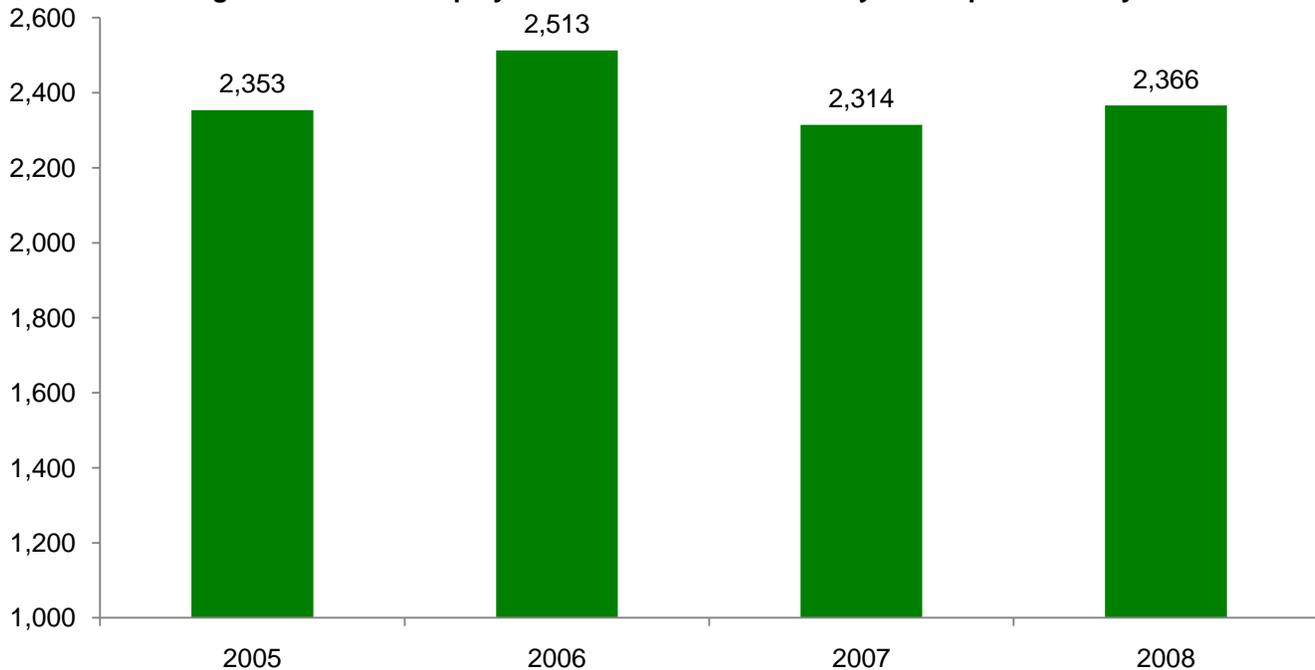
**Figure 4.2: Tompkins Visitor Spending Pattern (2008)**



Source: Oxford Economics

The total number of workers employed in the Tompkins County tourism industry is estimated to have been 2,366 in 2008 (Figure 4.3). Tourism employment in Tompkins County has been fluctuating in the past four years, peaking at 2,513 in 2006 before falling in 2007 and rising again in 2008. However, a change in methodology may be behind the drop in 2007.

<sup>26</sup> New York City is the most expensive hotel market in the nation. For example, in 2005, the average hotel rates in New York Metro were \$236 per night while the average of top 50 hotel markets was only \$102 per night. In 2008, a news report indicated that the average hotel rate in New York City was \$350 per night.

**Figure 4.3: Direct Employment in the Tourism Industry in Tompkins County**

Source: Oxford Economics

The leisure sector can be used as a proxy for the tourism industry. The leisure sector comprises the industries of accommodations, food services, arts, entertainment, and recreation. The leisure sector in Tompkins County, according to data from the Bureau of Labor Statistics as well as imputed data from JobsEQ.com, has grown steadily from 2005 through 2008 though it experienced a dip from 2004 to 2005. Employment in leisure fell from 3,793 in 2004 to 3,661 in 2005 (largely due to losses in food services and drinking places) before climbing to a new high of 3,931 in 2008.

## 4.2. The Lodging Industry in Tompkins County

Lodging is one of the largest components of the tourism industry in Tompkins County, accounting for a quarter of all tourism sales. Unlike retail, restaurants, and entertainment, which serve both residents and visitors alike, the lodging industry serves the needs of visitors almost exclusively. As a result, the trend on the lodging industry is a better indicator of local tourism than restaurant and retail sectors.

Based on an estimate from Smith Travel Research, Tompkins County had 19 hotels and motels establishments in December 2009 with over 1,500 hotels rooms within the county limit. The estimates in the Smith Travel Report do not include all establishments, especially small inns and bed and breakfasts (B&Bs) in the county which, if included, increase room capacity estimates by approximately 11%.<sup>27</sup>

The lodging industry in Tompkins County took a hit in 2009 due to the recession, and total lodging sales fell 7.1% to \$39.3 million. Prior to that, the lodging industry in Tompkins County had been expanding. Total sales in lodging

<sup>27</sup> Source: Chmura questionnaires for lodging establishment owners.

increased from \$31.1 million in 2005 to \$34.9 million in 2006, 39.5 million in 2007, and \$42.3 million in 2008 (Figure 4.4).<sup>28</sup> The increase in lodging sales was a reflection of both increased room occupancy and increased room rates.

**Figure 4.4: Direct Sales of Room Reveuve in Tompkins County (\$MM)**



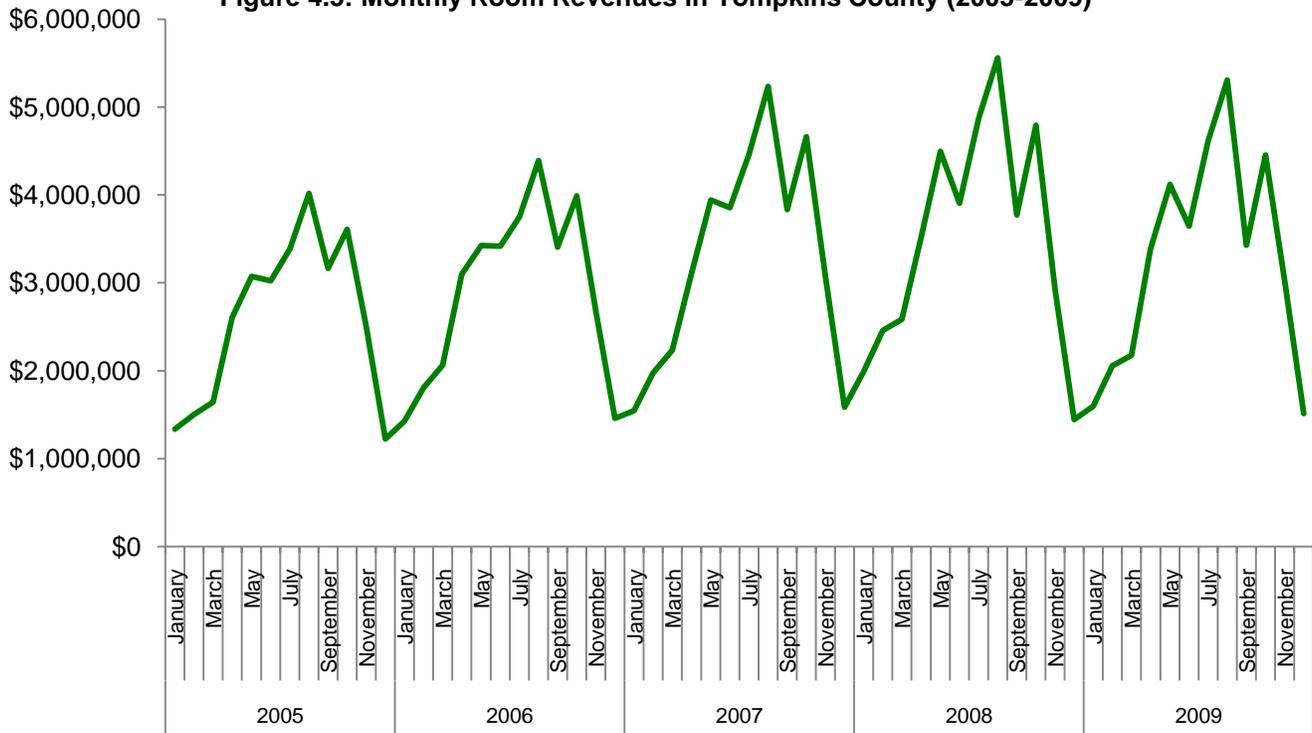
Source: Smith Travel Research

The lodging industry in Tompkins County exhibits strong seasonality. Figure 4.5 shows the estimated total room revenue of each month from 2005 to 2009. August and October are two peak months of year. The total room revenues in those two months are 55% and 39% more than the monthly average. December and January are the slowest months of the year with room revenues being only half of the monthly average. April can be considered an average month, with revenue is about the same as the annual average.

<sup>28</sup> This number estimated by Smith Travel Research is consistent with the Tourism Economics estimate. The Smith Travel number is about 24% of total tourism spending estimated by Tourism Economics. This number is also consistent with numbers estimated based on Tompkins County room tax receipts.

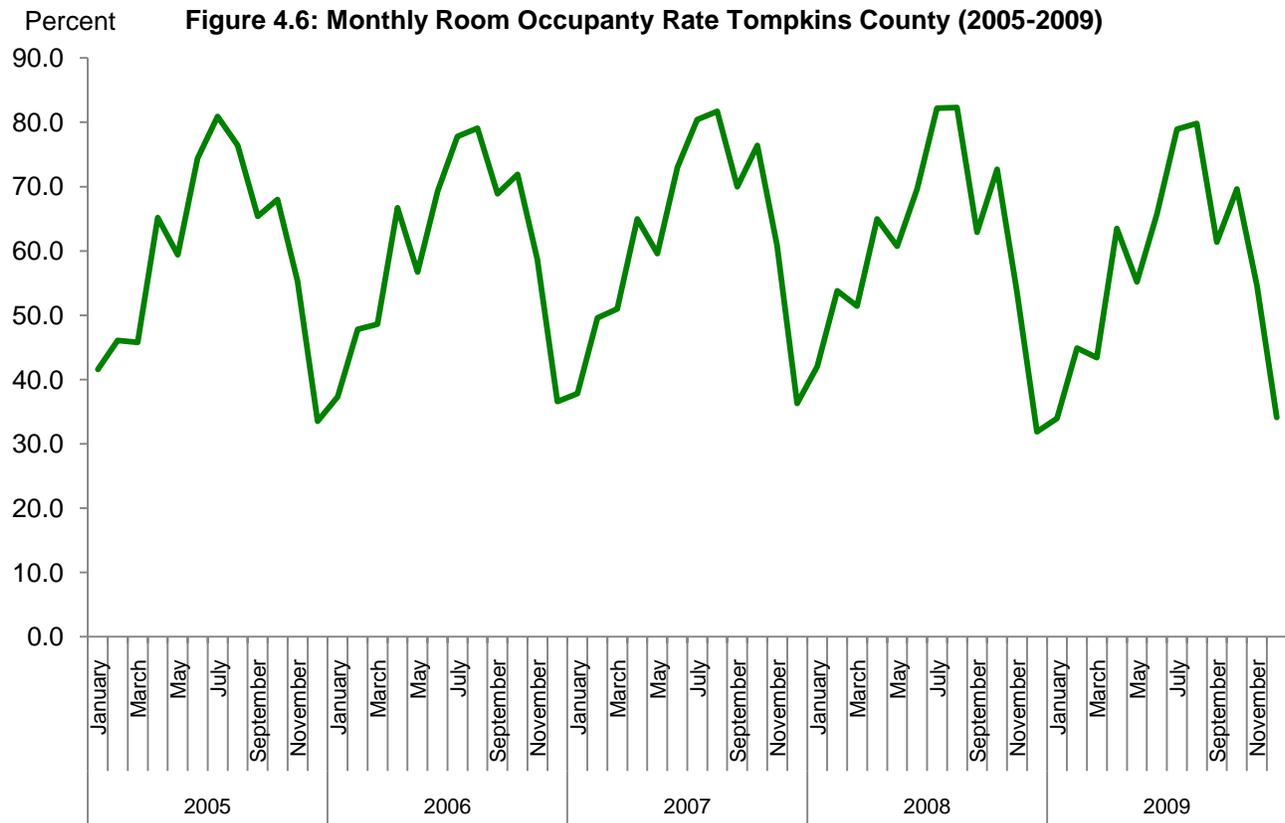


**Figure 4.5: Monthly Room Revenues in Tompkins County (2005-2009)**



Source: Smith Travel Research

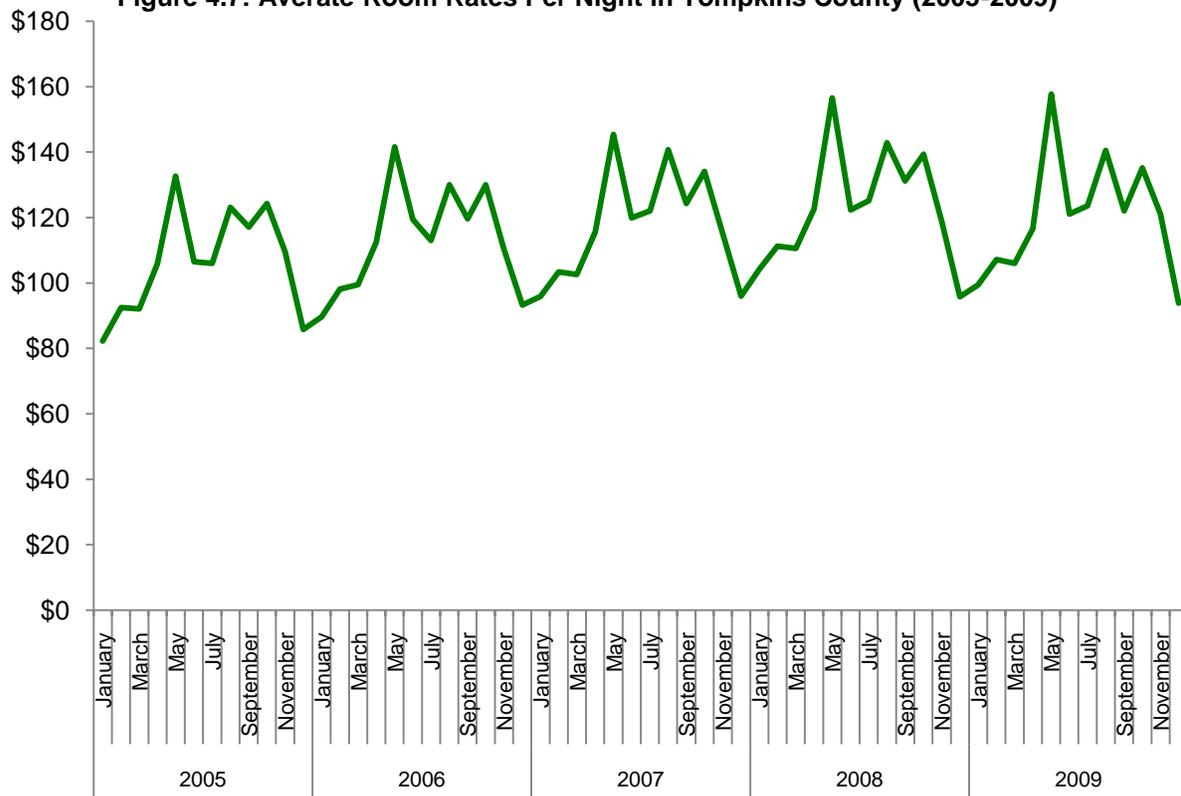
Room occupancy rates follow a similar pattern of seasonality (Figure 4.6). The average occupancy rate in Tompkins County is 60%. Occupancy rates in July and August can reach 80% while the occupancy rates in the slow season (such as January and December) are below 40%.



Source: Smith Travel Research

Average room rates in Tompkins County had been increasing until 2009. In 2005, the average room cost \$109 per night, increasing to \$116 in 2006, \$121 in 2007, and \$123 in 2008 before falling slightly to \$120 in 2009. The peak room rates usually occur in May, corresponding with graduations at Cornell University and Ithaca College. However, both the occupancy rates and total room revenues of May are lower than April. This suggests that the high price has a detrimental effect on the demand for rooms, or that demand in May is comparably very low outside the time of graduation.

Figure 4.7: Average Room Rates Per Night in Tompkins County (2005-2009)



Source: Smith Travel Research

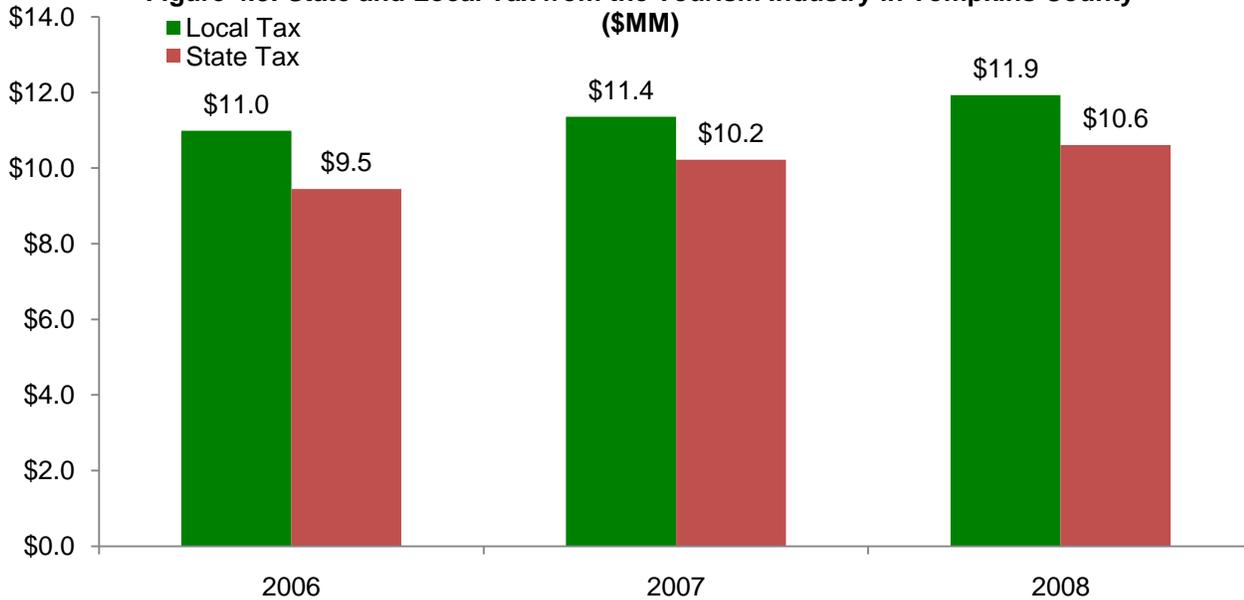
### 4.3. Tax Benefits from Tourism

Tourism contributes significantly to state and local tax revenue (Figure 4.8). Based on the data from Oxford Economics, the tourism industry in Tompkins County contributed \$11.0 million in tax revenue for Tompkins County in 2006, \$11.4 million in 2007, and \$11.9 million in 2008. Local taxes include sales, occupancy, and property taxes.<sup>29</sup> For New York State tax revenue, the annual contribution from the tourism industry in Tompkins County was \$9.5 million in 2006, \$10.2 million in 2007, and \$10.6 million in 2008. In 2008, the Tompkins County tourism industry generated \$597 in tax revenue per household in the county—consisting of \$316 in tax revenue to the county government and \$281 to the state government.<sup>30</sup>

<sup>29</sup> Source: Oxford Economics.

<sup>30</sup> According to US Census, the number of households in Tompkins County was 37,479 between 2006 and 2008.

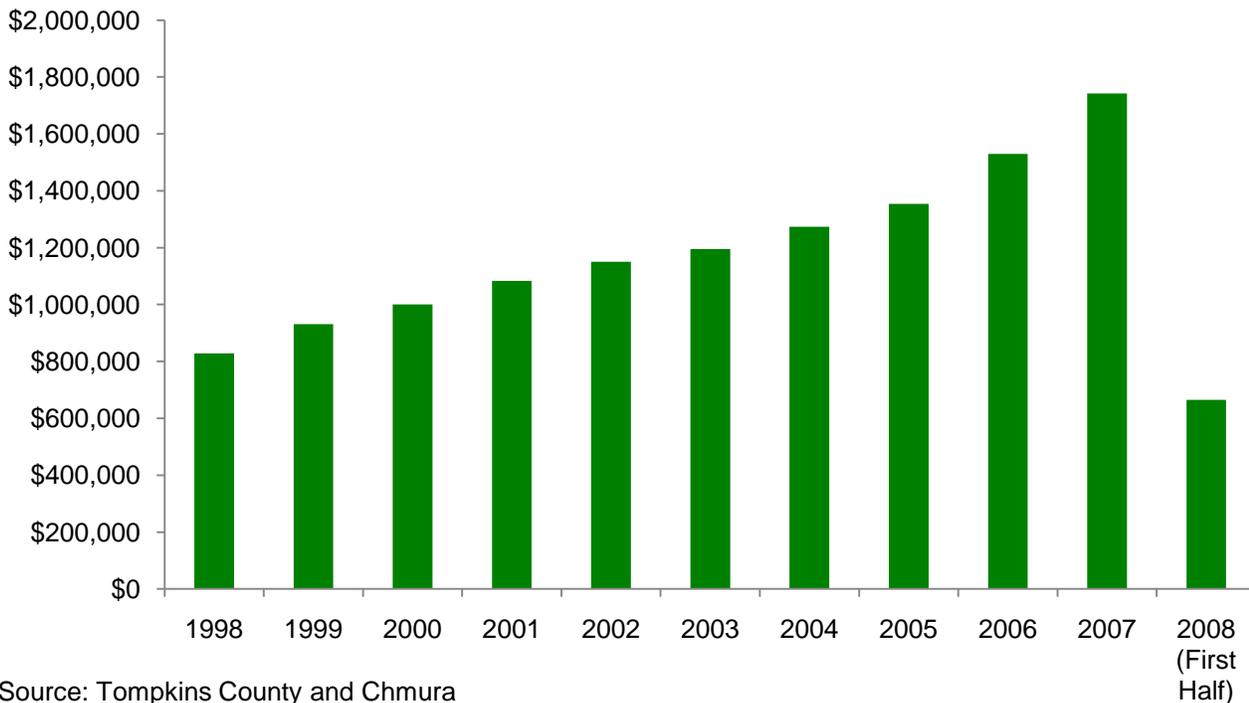
**Figure 4.8: State and Local Tax from the Tourism Industry in Tompkins County (\$MM)**



Source: Oxford Economics

The lodging industry in Tompkins County generated an estimated \$1.7 million in room occupancy taxes in 2007 (Figure 4.9). The county room occupancy tax revenues have been expanding steadily, at an average of about 8.6% per year. The room occupancy tax rate for Tompkins County is 5% of total room receipts, excluding exempt sales. Based on data provided from Tompkins County, an average 15.8% of all room sales are exempt from the room occupancy tax.

**Figure 4.9: Room Occupancy Tax Revenues in Tompkins County (1998-2008)**



Source: Tompkins County and Chmura

## 4.4. Summary of Other Research

Several visitor surveys have been conducted in Tompkins County in the past. These past studies focused on one aspect of visitors to Tompkins County, such as visitors to downtown Ithaca, Cornell University, Discovery Trail, state parks, or the Grassroots and Light in Winter festivals. None of these studies attempted to draw a complete picture of visitors to Tompkins County, the purpose of this study.

### 4.4.1. Ithaca Downtown Partnership Survey<sup>31</sup>

In June and July 2007, WB&A Market Research conducted a survey of 561 people in six East Coast states. The purpose of this study was to assess the visitor familiarity with the area—particularly downtown Ithaca—to determine perceptions of the area, to identify attractions visited, and to uncover deterrents to past and future visitations. This survey was not a visitor intercept survey, but a household survey with only 24% of those interviewed having visited Ithaca in the past five years and 16% never having visited Ithaca.

Six markets were selected: Rochester, Syracuse, Binghamton, Elmira, Albany, and Philadelphia. Of those interviewed, half were between the age of 36 and 55, 69% of them were female, and 85% were white. Among the respondents, 27% had annual household incomes between \$50,000 and \$100,000 and 23% had incomes over \$100,000.

In terms of familiarity with the Ithaca area, 30% of respondents were at least somewhat familiar with Ithaca and 30% of respondents had never heard of Ithaca.<sup>32</sup> In term of perceptions, 41% of respondents associated Ithaca with colleges and universities and 22% associated Ithaca with the natural environment.

Per the survey results, the most popular attractions in Ithaca were the state parks, waterfalls or gorges, where over 38% of those surveyed had visited. The next-most frequented locales were the downtown commons (visited by 34%) and Cayuga Lake (visited by 33%) (Figure 4.10). Note that visitations to the university and college campuses, themselves, were not tabulated in this survey question.<sup>33</sup>

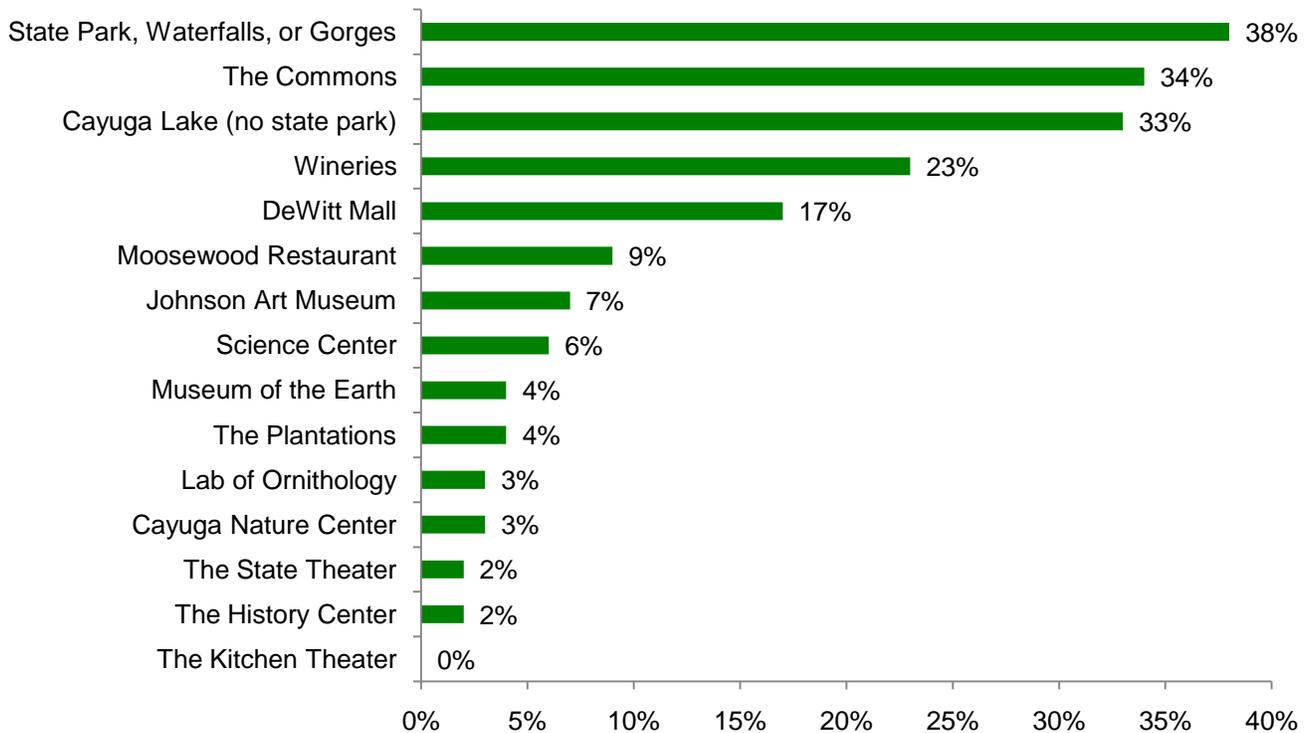
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<sup>31</sup> All data cited in this section come from: Ithaca Tourism Study, July 2007, prepared for The Ithaca Downtown Partnership by WBA Market Research.

<sup>32</sup> Those who were not familiar with the Ithaca area were screened out of further questions which included questions regarding visitation of Ithaca.

<sup>33</sup> That is, the campuses were not counted as locations themselves even though university- and college-related attractions, such as the Cornell Plantations, were tabulated.

**Figure 4.10: Places Visited on Most Recent Trip to the Area**



Source: Ithaca Downtown Partnership and WB&A Market Research

This study provides interesting insights into the visitor characteristics and their visit behaviors, which helped Chmura design and implement the surveys. The concern is that the survey sample may not be representative of typical visitors. The sample includes five New York cities and one out-of-state market.

#### 4.4.2. Cornell Visitors<sup>34</sup>

As the home of Cornell University and Ithaca College, university- and college-related visitors are important components of all visitors to Tompkins County. A study released in 2007, *Cornell University Economic Impact on New York State*, included some estimates of the economic impact of Cornell visitors. The study estimates that in 2005, total Cornell visitors amounted to 172,300, with the largest visitor segment being those attending athletic events, followed by those attending commencement and prospective students (Table 4.1). The study further estimated that the total direct spending of Cornell visitors was \$38 million in 2005.

<sup>34</sup> All data cited in this section are from Cornell University Economic Impact on New York, 2007, prepared by Appleseed.

Table 4.1: Cornell Visitors - 2005	
Cornell Attractions	Number of Visitors
Prospective Students	24,575
Commencement	34,000
Summer Visitors	23,130
Athletic Events	57,640
Summer Camps	13,715
Campers Parents drop-off/pick-up	7,780
Conference and other visitors	11,460
Total	172,300
Source: Cornell University & Appleseed	

#### 4.4.3. Discovery Trail Intercept Survey<sup>35</sup>

The Discovery Trail links eight attractions located in Tompkins County: the Cayuga Nature Center, the Cornell Lab of Ornithology, the Cornell Plantation, the History Center of Tompkins County, the Johnson Museum of Art, the Museum of the Earth, the Science Center, and the Tompkins County Public Library. To better understand its visitors and to increase visitor volume, the Discovery Trail contracted the Survey Research Institute of Cornell University to conduct visitor intercept surveys in 2004 and 2006 at all above eight locations. Those two surveys focused on two main issues, the travel party origin and size and the perception of the Discovery Trail.

In 2004, 50.2% of travel parties to these attractions had out-of-county guests, and that number increased to 66.4% in 2006. Visitors were predominantly from the Northeast region of the country with most being from the surrounding New York counties. There were also sizable numbers of visitors traveling from the Mid-Atlantic states and California.

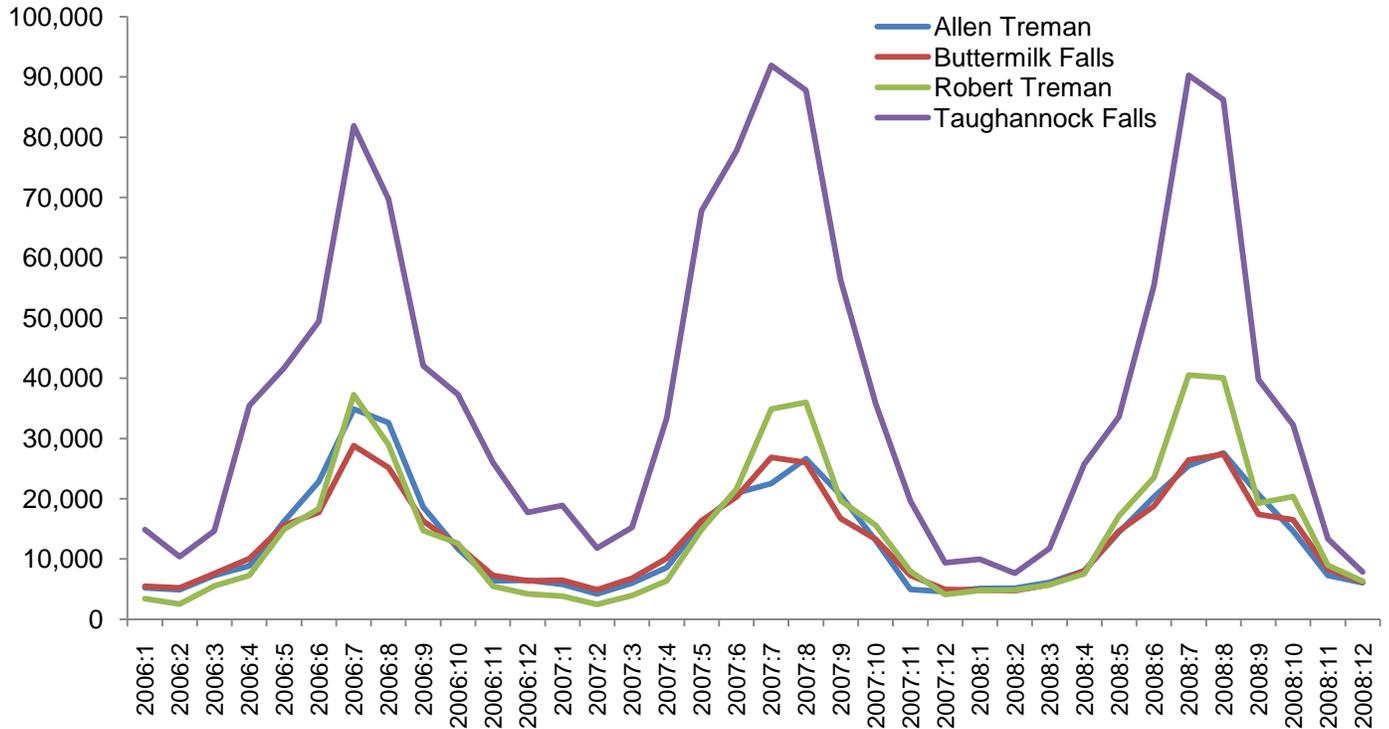
In terms of perception, almost half (49.2%) of survey respondents in the 2004 survey reported that they heard about the Discovery Trail and 40% reported that the location of the Discovery Trail influenced their decision to visit Tompkins County. In 2006, those numbers dropped to 32.9% and 12.2%. Respondents said the mostly likely information source regarding the Discovery Trail was family and friends.

#### 4.4.4. State Parks

There are four state parks located in Tompkins County—Allen H. Treman Marine, Buttermilk Falls, Robert H. Treman, and Taughannock Falls. Allen H. Treman State Marine Park is one of the largest inland marinas in New York State. Buttermilk Falls, Taughannock Falls, and Robert H. Treman State Park have renowned gorges and waterfalls. These four parks are popular destinations for visitors and residents alike.

<sup>35</sup> All data cited in this section are from two reports: The Discovery Trail-Survey of Visitors Summary Report 2004 and 2006, Prepared by Survey Research Institute, Cornell University.

**Figure 4.11: Monthly Attendance Volume of Tompkins County State Parks (2006-2008)**



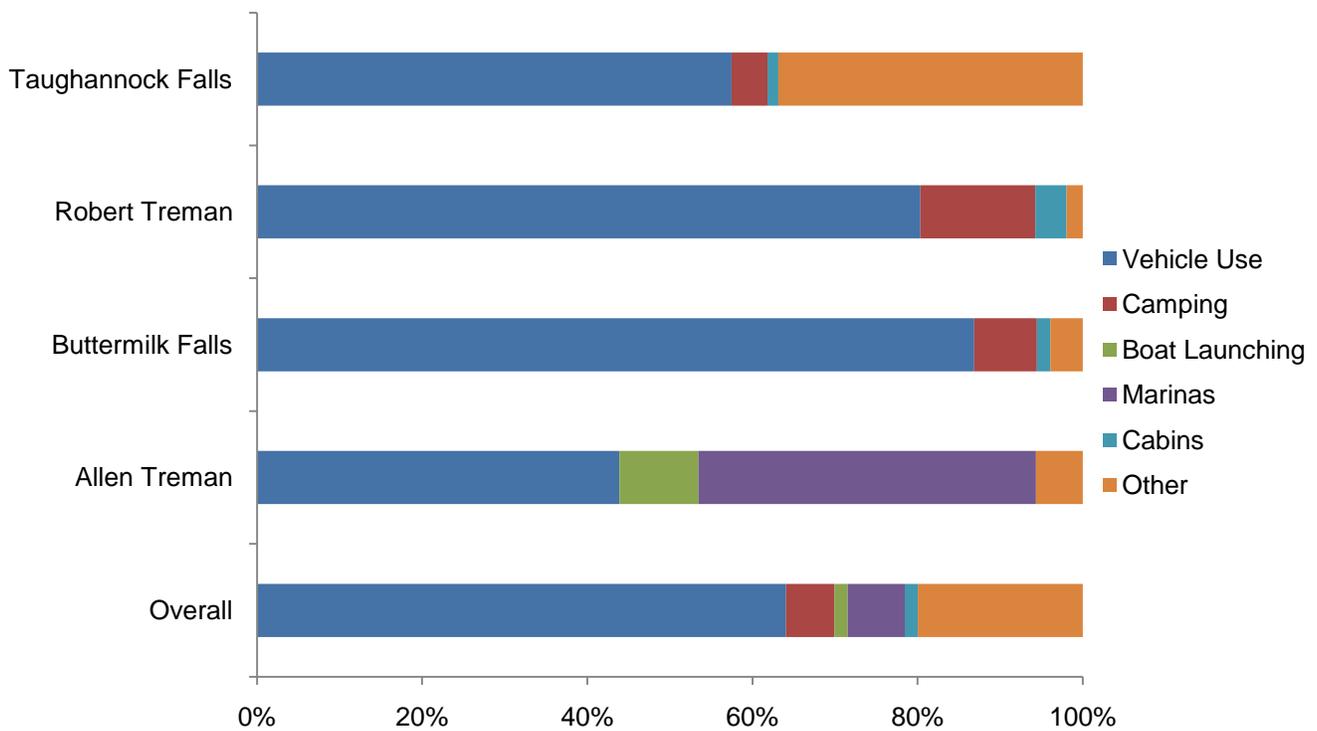
Based on the data provided by the New York State Park Service, annual attendance to the four state parks in Tompkins County fluctuated around one million in recent years. The attendance was 0.9 million in 2006, 1.0 million in 2007, and 0.9 million in 2008 (Figure 4.11). Among the four state parks, the most popular is Taughannock Falls State Park, which captures about half of all park attendance. The attendance figures for the other three state parks are of similar magnitude, with Robert Treman having higher attendance of these three in 2007 and 2008.

Strong seasonality exists for people visiting the state parks, with the summer (June, July and August) the most popular time. Visitations in July and August typically double the average monthly attendance while visitations in December and January are only about one third of the average monthly attendance.<sup>36</sup>

Over 60% of the activities in state parks are vehicle uses, followed by camping, marinas, and cabin use. Marina boat launching accounted for more than half of the activities in Allen Treman State Park (Figure 4.12).

<sup>36</sup> Note that while these are official figures, strong evidence suggests the data are estimated and that the winter month attendances are overestimates of actual visitations.

**Figure 4.12: Tompkins County State Park Attendance Composition (2006-2008)**



#### 4.4.5. Economic Impact of the Grassroots Festival of Music and Dance

In 2009, Americans for the Arts released a study titled *Arts & Economic Prosperity III*. This national study featured the economic impacts of arts in 156 study regions around the country. Data were collected from 6,080 nonprofit arts and cultural organizations and 94,478 participants across 50 states and the District of Columbia.

The Finger Lakes Grassroots Festival of Music and Dance was included in this study. In 2008, the Grassroots Festival attracted 46,276 attendees with 66% from outside Tompkins County. The study concluded that this festival is a significant economic engine in Tompkins County, generating \$4.8 million in local economic activities. In addition, this festival was estimated to support 102 full-time equivalent jobs and to deliver \$644,000 in local and state government revenue.

The study also estimated that the attendees to the Grassroots Festival spent an average of \$89.97 per person in Tompkins County during the festival. Of this spending, half was spent on meals and refreshments, 16% on gifts and souvenirs, and 13% on lodging expenses for out-of-town attendees.

In addition, 1,387 arts volunteers donated 17,058 hours to the Grassroots Festival of Music and Dance in 2008. This represents a donation of time valued at \$345,425. The festival also received in-kind contributions from other businesses with a value of \$75,706.

#### 4.4.6. Light in Winter and Winter Recess Festivals

In February 2007, the Department of City and Regional Planning at Cornell University conducted an analysis of the economic impact of Ithaca’s Light in Winter Festival. The 2007 festival was held from January 26 to 28 at a variety of downtown and Cornell University venues. An estimated 5,154 people attended the festival in 2007.

The majority of attendees resided in Tompkins County with 23% coming from outside the county. Over half of the non-Tompkins attendees stayed overnight in the county; of these, 26% stayed in a hotel. Of total festival attendees, approximately 58% were planning to eat out or had already eaten out in Ithaca.

The survey also found that the primary source of information for the Light in Winter Festival was word of mouth with print advertisements being the second main source.

Since 2007, the county has also staged a Winter Recess Festival, celebrating classroom teachers. This event combines Ithaca's attractions, college events, theater, spas, restaurants, and shops, and puts them on sale for educators. In 2007, this event attracted more than 1,300 educators and family members.

#### **4.4.7. Finger Lakes Traveler Survey**

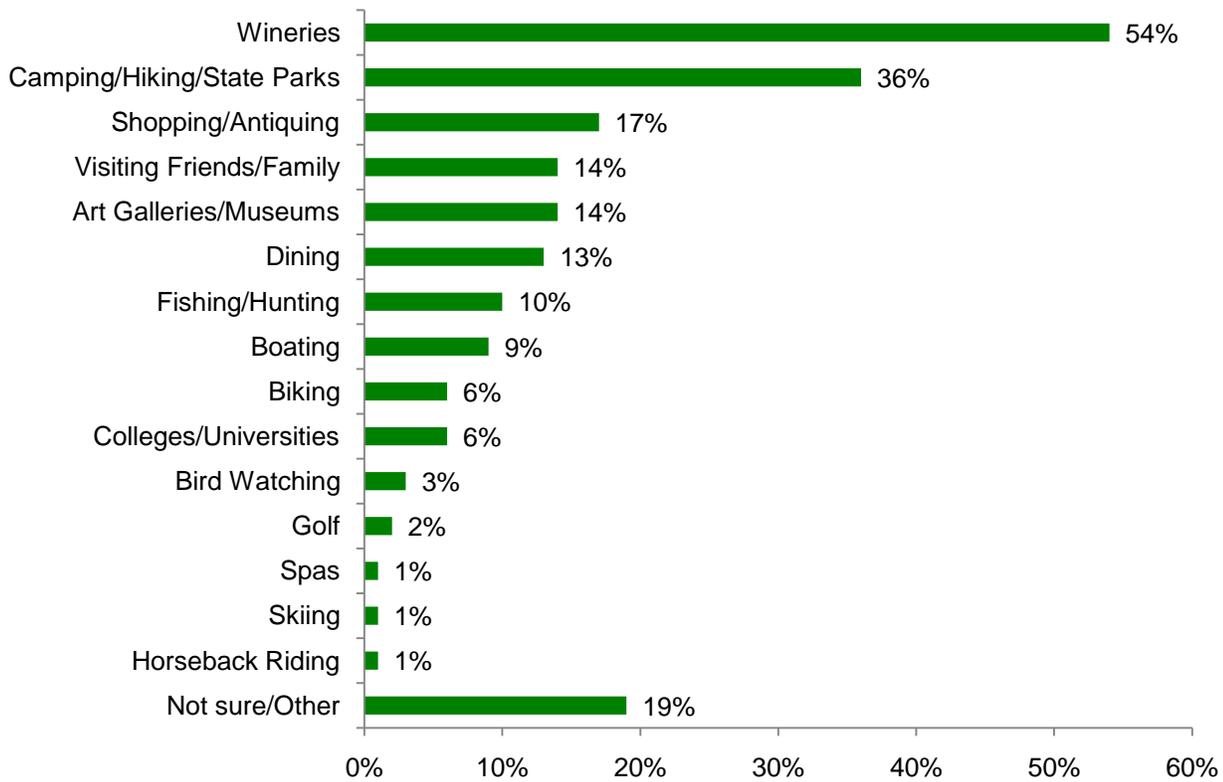
In June 2009, on behalf of the Tompkins County Convention & Visitors Bureau and the Finger Lakes Tourism Alliance, Smith Marketing Services conducted a survey to determine customer satisfaction and awareness of the Finger Lakes region after they received a travel guide from the above two organizations. Data were collected from 611 adults in the United States and Canada. The majority of the respondents (60%) were categorized as vacationers.

Overall, 57% of the survey respondents visited the Finger Lakes region after receiving a travel guide in 2008. For the Tompkins Convention & Visitors Bureau, the conversion rate was 42%. For the Finger Lakes Tourism Alliance, the conversion rate was 76%. Respondents residing within a two-hour drive of the region had the highest conversion rate (70%), while conversion rates were similar for people with the proximity of a two to four hours drive (53%), four to five hours drive (55%), and six or more hours drive (56%) away.

In terms of visitor activities, survey respondents reported that they stayed an average of 4.1 days in the Finger Lakes region. For overnight visitors, 55% stayed in a hotel or motel with 14% of them staying at a bed and breakfast.

Among the survey sample, the most popular attractions in the area were the wineries, which 54% of the visitors listed as what attracted them to the Finger Lakes region. This was followed by camping, hiking, and state parks (36%) and shopping and antiquing (17%) (Figure 4.13).

**Figure 4.13: Attractions in the Finger Lakes Region**



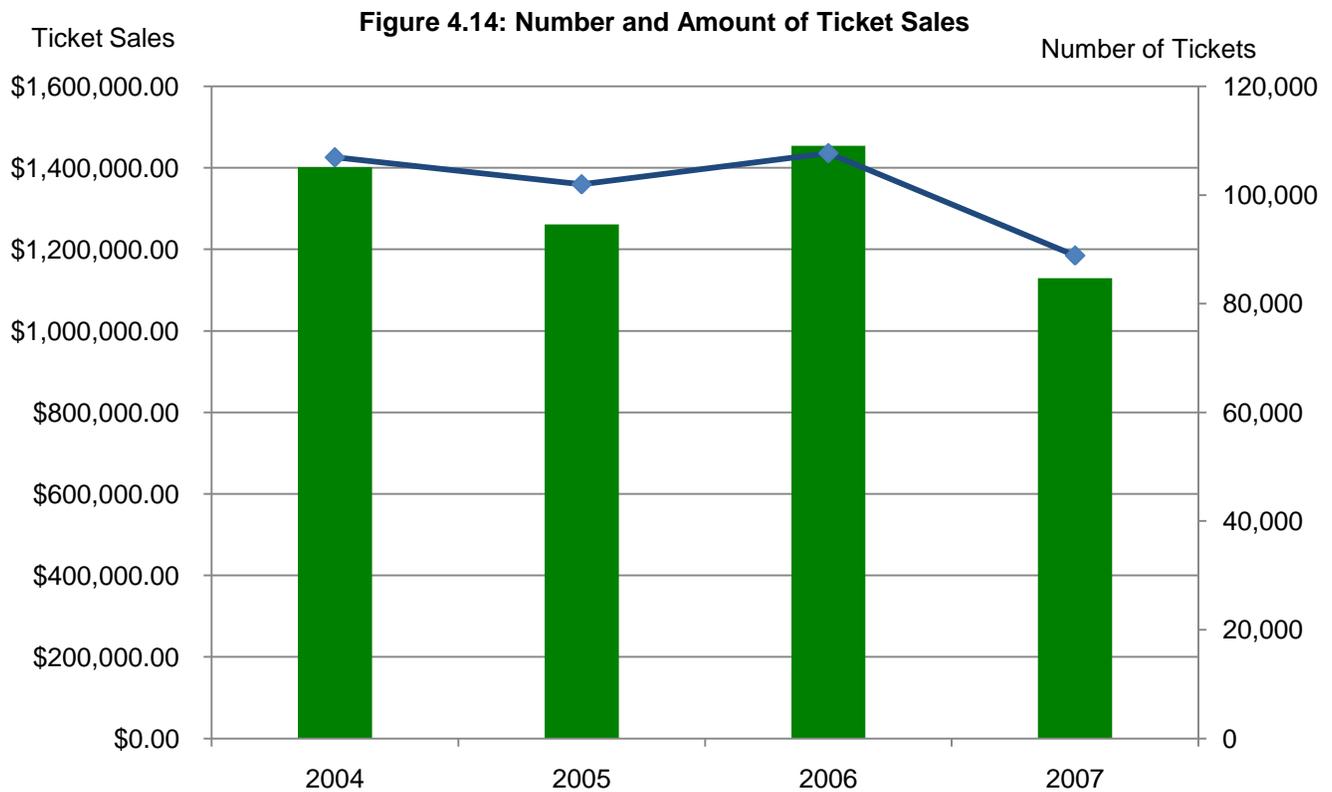
Source: Tompkins Convention & Visitors Bureau and Finger Lakes Tourism Alliance

Two unique features of this survey are that it asked about visitors' satisfaction with the region and how they planned their trips to the Finger Lakes region. Overall, respondents had a positive view of the region and 98% of them reported that their expectations were met. The internet was a favorite choice for visitors looking for information when they planned a trip, followed by brochures and travel guides. Younger respondents were more likely to prefer using websites for information.

#### 4.4.8. Theater Ticket Sales

The cultural and arts activities in Ithaca and Tompkins County are a big draw to visitors from surrounding areas. The Community Arts Partnership in Ithaca tracked detailed ticket sales data from 2004 to 2007 and shared the data for this study.<sup>37</sup> The data show that the theater programs in Ithaca attracted over 100,000 attendees from 2004 to 2006. However, the attendance dipped to close to 90,000 in 2007 (Figure 4.14). Among these theater goers, 64% were from locations outside Tompkins County.

<sup>37</sup> Partial data for 2008 was also provided.



Source: Community Arts Partnership

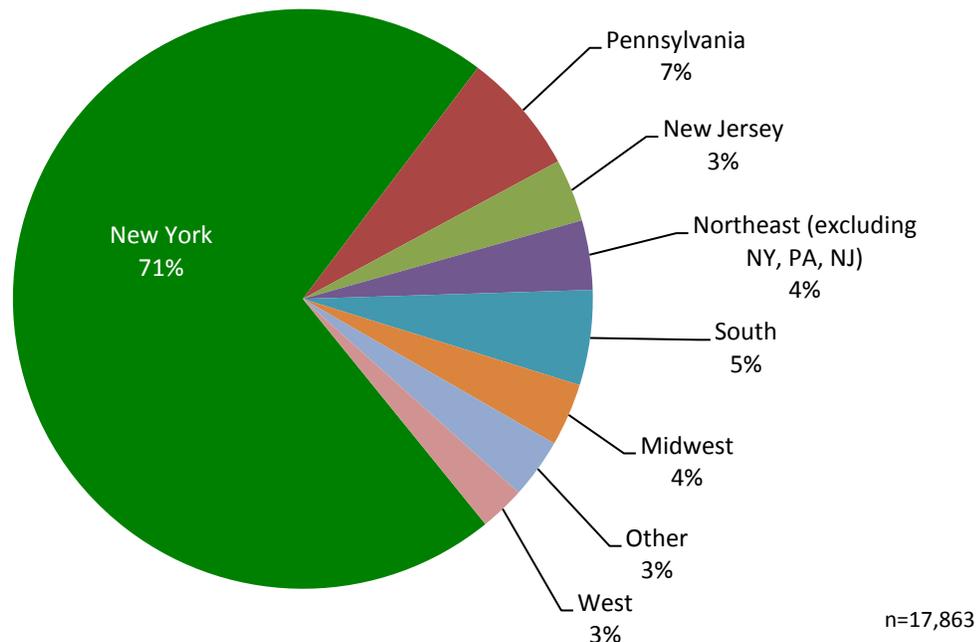
Note: The blue line represents the numbers of tickets and the green bars represent sales.

#### 4.4.9. Museum of the Earth ZIP Code Data

The Paleontological Research Institution (PRI) operates the Museum of the Earth on Ithaca’s West Hill, overlooking Cayuga Lake. PRI collects zip code information on Museum of Earth visitors and graciously shared data from the 2008 calendar year with Chmura for this study.

The geographic distribution of this data is not expected to match up exactly with data from the intercept surveys. Nor is the Museum of Earth geographic distribution considered to be ideally representative of all visitors to the Ithaca area. Rather, the museum data is taken as a detailed geographic snapshot of one Ithaca tourist segment and is used for purposes of comparison.

**Figure 4.15: State/Region Location of 2008 Museum of the Earth Visitors (excluding Tompkins County Residents)**



A large majority (71%) of Museum of the Earth out-of-town visitors in 2008 hailed from the state of New York. The states with the next-most visitors were Pennsylvania (7%) and New Jersey (3%), also from the Northeast US region.<sup>38</sup> Together, the Northeast region accounted for 85% of Museum of the Earth out-of-town visitors. By comparison, the South<sup>39</sup> region accounted for 5% of visitors, the Midwest<sup>40</sup> for 4%, and the West<sup>41</sup> for 3%. The “other” category shown here includes those visitors for which there was no ZIP code information which includes foreign travelers, most notably those from Canada.

<sup>38</sup> According to the definition used by the United States Census Bureau, the Northeast region consists of nine states: the New England states of Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut; and the Mid-Atlantic States of New York, New Jersey and Pennsylvania.

<sup>39</sup> As defined by the United States Census Bureau, the Southern region of the United States includes sixteen states and the District of Columbia, including Texas and Oklahoma on the western edge and Kentucky, West Virginia, Maryland, and Delaware along the northern edge.

<sup>40</sup> The Midwest consists of twelve states in the central and inland northeastern United States: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

<sup>41</sup> As defined by the United States Census Bureau, the Western region of the United States includes 13 states: the Mountain States (Montana, Wyoming, Colorado, New Mexico, Idaho, Utah, Arizona, and Nevada) and the Pacific States (Washington, Oregon, California, Alaska and Hawaii).

<b>Table 4.2: Museum of Earth 2008 Visitors by Top 15 States (Excluding Tompkins County Residents)</b>	
New York	12,708
Pennsylvania	1,218
New Jersey	626
No ZIP Code	595
California	245
Massachusetts	237
Ohio	226
Connecticut	183
Florida	163
Maryland	162
Virginia	147
Illinois	140
North Carolina	106
Michigan	100
Maine	93
Other	914
<b>TOTAL</b>	<b>17,863</b>

New York accounted for 27,520 Museum of the Earth visitors in 2008—12,708 after excluding residents of Tompkins County. After New York, Pennsylvania, and New Jersey, other top origin states for museum visitors were California (245 visitors in 2008), Massachusetts (237), Ohio (226), Connecticut (183), Florida (163), and Maryland (162).



# Appendices

## A.1. Intercept Survey

Note that the survey results presented here may be similar to, but not exactly the same as presented in Section 2. This is because the Section 2 results are weighted so that the sample more closely matches the actual mix of visitors to the county. The results presented here are not weighted and pertain directly to the sample that was surveyed.

### A.1.1. Methodology

From December 2008 through November 2009, intercept surveys with visitors were conducted throughout Tompkins County. For the purpose of the survey, people who lived, worked, or attended school in the county were not considered visitors. Furthermore, in order to capture information from travelers at the end of their trip rather than at the beginning, interviews were conducted only with tourists who would be ending their visit to the area within the next 24 hours.

The interviews were conducted by WB&A Marketing of Ithaca, New York. Interviewees were instructed to conduct the data collection in a respectful and no-pressure manner so as to not agitate any visitors. Since the interviews were collected in public and possibly crowded locations, certain sensitive questions (those regarding age and household income) were answered with the aid of a letter-coded card so that respondents could answer these questions discretely with a letter response.

Table A.1: Month of Intercept Survey	
January	3%
February	5%
March	6%
April	7%
May	7%
June	10%
July	16%
August	15%
September	12%
October	15%
November	3%
December	1%
Total	100%
	n=1,503

Table A.2: Aggregate Survey Locations	
Hotel/Lodging	29%
Downtown	20%
Parks	17%
University/College	16%
Other	18%
Total	100%
	n=1,503

The target numbers of interviews by month were set up to roughly mirror visitation volume as modeled by lodging data. Target collections by location were arranged with four key locations: lodging establishments, parks, downtown (including the Commons), and university/college venues. These locations were supplemented by a variety of others, including transportation hubs (bus station and airport), cultural attractions (museums and theatres), and other attractions (such as the Farmers Market, the Moosewood Restaurant, and the Six Mile Creek Vineyard).

Table A.3: Location of Survey	
Hotel/Lodging <sup>42</sup>	29%
Commons	14%
Cornell University	12%
Taughannock State Park	6%
Buttermilk State Park	5%
Ithaca College	4%
Johnson Art Museum	3%
Bus Station	3%
Museum of the Earth	3%
Farmers Market	3%
Moosewood	3%
Six Mile Creek	2%
Plantation	2%
Robert Treman State Park	2%
Airport	2%
State Theatre	2%
Stewart Park	2%
Allan Treman Marina	1%
Cass Park	<1%
West End	<1%
Ithaca Bakery	<1%
Kitchen Theatre	<1%
Hangar Theatre	<1%
Dewitt Mall	<1%
Total	100%
	n=1,503

Surveying was done at a variety of times of day, from the early morning hours (at the airport) to the early evening hours. Interviews were collected on each day of the week, though more often on or near the weekends when visitor volume was larger. Interviewers were instructed to interview only one member of any traveling party and only persons age 18 and over.

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<sup>42</sup> Hotel intercepts were conducted at the following hotels (in order of most-interviews collected): Hilton Garden Inn, Best Western, Statler Hotel, Hampton Inn, La Tourelle, Courtyard Marriott, Holiday Inn, Ramada Inn, Clarion Hotel, Comfort Inn, and Country Inn and Suites.

The resultant sample of 1,503 responses yields a sampling error of approximately  $\pm 2.5\%$  with 95% confidence. Results presented below that compare subgroups and are statistically significant with 95% or higher confidence are marked with an asterisk.

### A.1.2. Demographics

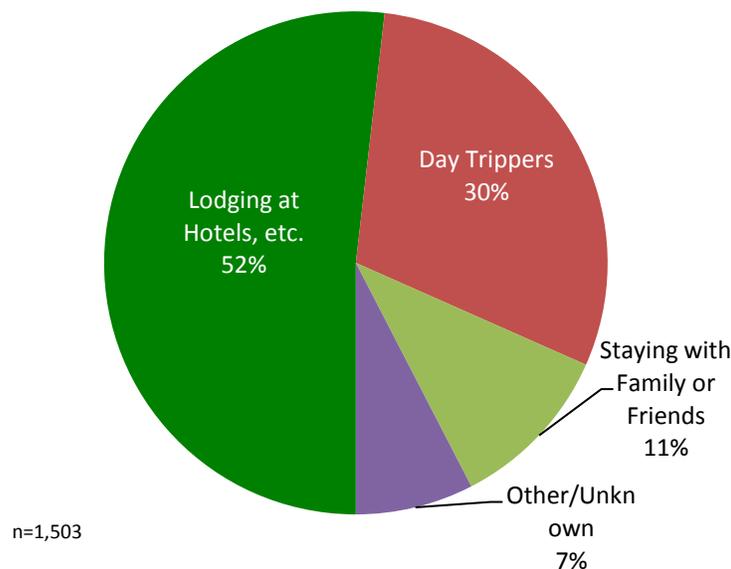
Table A.4: Gender – Intercept Survey	
Female	48%
Male	50%
Not Recorded	1%
Total	100%
	n=1,503
Note: Numbers may not sum due to rounding.	

Table A.5: Ethnicity or Race – Intercept Survey	
White	88%
Asian or Asian American	6%
Black or African American	3%
Hispanic/Latino	2%
Other/Not Specified	2%
Total	100%
	n=1,503
Note: Numbers may not sum due to rounding.	

The respondent sample was split fairly evenly by gender: 48% female versus 50% male. The gender of respondents was not asked, but was recorded by observation by the interviewees.

By ethnicity or race, the visitor sample consisted of 88% white, 6% Asian or Asian American, 3% Black or African American, and 2% Hispanic/Latino. While these ratios differ significantly from those of the United States as well as New York, they are somewhat similar to those of Tompkins County. According the Census Bureau’s American Community Survey for 2006-2008, the county population consisted of 83% white, 10% Asian, and 4% Black or African American.

Figure A.1: Traveler Type - Intercept Survey



By traveler type, a little over half of the sample (52%) consisted of overnight visitors who lodged at a hotel or similar establishment (meaning a motel, resort, inn, or bed and breakfast). A little under a third of the respondents (30%) were on a day trip. Eleven percent of the respondents were overnight visitors that lodged with family or friends. The

remaining 8% of respondents are in the “other/unknown” category which consists of overnight visitors that stayed at campgrounds, in dorms, at multiple locations (such as one night at a hotel and one night with family), at other miscellaneous locations, or non-disclosed locations. These mutually exclusive categories will be used throughout this report in order to segment the data and re-aggregate the data according to other ratios.

Table A.6: Educational Attainment – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
Less Than H.S. Diploma	2%	0%	0%	2%	1%
High School Diploma	17%	20%	8%	20%	13%
2-Year Degree	15%	9%	6%	9%	9%
4-Year Degree	30%	33%	36%	28%	33%
Graduate School	36%	38%	48%	40%	43%
Other/Not Specified	0%	1%	1%	1%	1%
Total	100%	100%	100%	100%	100%
	n=448	n=162	n=779	n=114	n=1,503

The visitors in the sample had a much higher average educational attainment than residents of either Tompkins County, New York, or the nation. For example, 43% of the visitors reported completing graduate school compared to 29% of Tompkins County residents, 14% in New York, and 10% in the nation.<sup>43</sup>

- Higher\* educational attainment was seen among those lodging at hotels and similar establishments (84% with a bachelor’s degree or higher) compared to those staying with family or friends (71%) or day trippers (66%). This is likely tied to purpose as respondents at hotels and similar lodging were more likely to be visiting because of university- or college-related business than day trippers or those staying with family or friends. Respondents whose visits were university- or college-related were more likely\* to have a bachelor’s degree or higher (84%) than those whose visit was not university- or college-related (67%).

Table A.7: Age – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
18-24	6%	22%	4%	13%	7%
25-34	10%	27%	12%	19%	14%
35-44	17%	10%	15%	15%	15%
45-54	37%	18%	37%	32%	35%
55-64	22%	18%	24%	17%	22%
65+	7%	5%	9%	4%	7%
Total	100%	100%	100%	100%	100%
	n=444	n=162	n=760	n=113	n=1,479 <sup>44</sup>

Note: Numbers may not sum due to rounding.

<sup>43</sup> Educational attainment statistics are per the US Census Bureau’s 2006-2008 American Community Survey.

<sup>44</sup> The total for the age question is less than the 1,503 total responses because some did not respond to this question.

By age cohort, 35% of respondent visitors were aged 45 to 54 and 22% were aged 55 to 64. Only 7% were 65 years and over, the same percentage that were 18 to 24. The remaining 29% were aged 25 to 44.

- Visitors staying with family or friends had the highest percentage of those 34 and under (49%), much higher\* than average (21%).
- The 45 to 54 cohort is especially pronounced among Tompkins County visitors due to the university and college. Visitors traveling with a purpose related to the university or college were more likely\* to be aged 45 to 54 (42%) than those traveling without a purpose related to the university or college (25%).
- For comparison purposes, the median age among Tompkins County residents is 28.5 and the 45 to 54 years cohort accounts for 11% of the population.<sup>45</sup>

Table A.8: Household Income – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
Less than \$20,000	6%	16%	3%	9%	6%
\$20,000-49,999	18%	26%	7%	14%	13%
\$50,000-79,999	27%	22%	14%	27%	20%
\$80,000-99,999	15%	11%	14%	19%	14%
\$100,000-149,999	21%	13%	26%	16%	22%
\$150,000+	15%	11%	36%	16%	25%
Total	100%	100%	100%	100%	100%
	n=400	n=148	n=666	n=103	n=1,317

Note: Numbers may not sum due to rounding.

Median household income in Tompkins County is \$47,770 with 20% of the households earning \$100,000 or more per year.<sup>46</sup> By contrast, the average income of visitors is much higher: the median household income of survey respondents was somewhere between \$90,000 and \$100,000 with 48%<sup>47</sup> reporting annual income of \$100,000 or more.

- The highest household incomes were found more often among those lodging at hotels and similar establishments (62% with incomes of \$100,000 or higher) and the lowest incomes were found more often among those staying with family and friends (42% with incomes of less than \$50,000). Like educational attainment and age, these differences are related to travel purpose: those whose purpose of travel was university- or college-related were more likely\* (59%) to have a household income of \$100,000 or more compared to those whose travel was not university- or college-related (35%).
- Those whose purpose of travel was not university- or college-related still had a higher median household income than county residents. Median household income among this group among the survey respondents was somewhere between \$80,000 and \$90,000.

<sup>45</sup> US Census Bureau 2006-2008 American Community Survey.  
<sup>46</sup> US Census Bureau 2006-2008 American Community Survey.  
<sup>47</sup> The number does not sum from the table entries due to rounding.

<b>Table A.9: Region of Origin – Intercept Survey</b>					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
New York State	78%	42%	34%	46%	49%
US Northeast (not NY)	16%	23%	29%	23%	24%
US South	2%	16%	14%	9%	10%
US Midwest	1%	8%	9%	5%	6%
US West	1%	4%	7%	7%	5%
Canada	1%	4%	4%	4%	3%
Foreign (not Canada)	1%	3%	3%	5%	3%
Total	100%	100%	100%	100%	100%
	n=400	n=148	n=666	n=103	n=1,317

Note: Numbers may not sum due to rounding.

By geographic region, nearly half (49%) of visitors in the intercept survey were from the state of New York. Nearly a quarter (24%) of respondents were from some other state in the US Northeast. Among the other US regions, 10% of visitors were from the South, 6% from the Midwest, and 5% from the West. Foreign visitors accounted for 6% of the survey respondents with half of those being from Canada.

- Among the 41 foreign responses excluding Canadians, the countries with the most responses were the United Kingdom (8 responses) and Israel (6). Of these 41, 61% were from Europe and 27% were from Asia.
- New York residents were more prominent (78%) among day trippers. Note that day trippers from far-away locations may have lodged near but outside of Tompkins County and have taken day trips into the area or may have been passing through the area.

<b>Table A.10: Top Ten US States of Origin (Excluding New York) of Tompkins County Visitors – Intercept Survey</b>	
Pennsylvania	9%
New Jersey	7%
Massachusetts	5%
California	3%
Connecticut	2%
Florida	2%
Maryland	2%
Illinois	2%
Ohio	2%
Michigan	2%
All US Respondents - Total	100%
	n=1,413

<b>Table A.11: Metropolitan Statistical Areas of Origin of Tompkins County Visitors – Intercept Survey</b>	
New York	19%
Binghamton	8%
Rochester	6%
Syracuse	6%
Philadelphia	4%
Boston	3%
Buffalo	3%
Albany	2%
Washington DC	2%
Elmira	2%
Chicago	2%
Los Angeles	1%
Other Metropolitan Areas	27%
Rural Counties	12%
Unknown Localities	4%
All US Responses - Total	100%
	n=1,413

Note: Numbers may not sum due to rounding.

Within the survey sample, the top states of visitor origin besides New York were led by Pennsylvania (9%), New Jersey (7%), and Massachusetts (5%). The results here are similar to those found in the smaller Visitors Bureau survey as well as the extensive Museum of the Earth database which are described elsewhere in this report.

By metropolitan statistical area (MSA), New York City accounted for 19% of US respondents. This was followed by three smaller upstate New York metros: Binghamton (8%), Rochester (6%), and Syracuse (6%). Philadelphia (4%) and Boston (3%) provided the next-most number of respondents followed by two additional New York metros, Buffalo (3%) and Albany (2%). Rural localities were the geographic origin of 12% of survey respondents, similar to the 15% found in the Visitors Bureau surveys.

Table A.12: Top Fifteen Counties of Origin of New York State Tompkins County Visitors - Intercept Survey			
Broome	11%	Chemung	4%
Monroe	9%	Queens	3%
Onondaga	8%	Suffolk	3%
Erie	5%	Cortland	3%
New York	5%	Steuben	2%
Westchester	5%	Cayuga	2%
Nassau	4%	Other NY Counties	28%
Tioga	4%	New York State - Total	100%
Kings	4%		n=706

The top New York counties of origin among Tompkins County visitors in the intercept survey were led by the counties of nearby metro areas: Broome (Binghamton MSA), Monroe (Rochester), Onondaga (Syracuse), and Erie (Buffalo). Other top counties of origin included counties of the New York metro area (New York County, Westchester, Nassau, Kings, Queens, and Suffolk) as well as counties proximate to Tompkins (Tioga, Chemung, Cortland, Steuben, and Cayuga). The top fifteen counties in New York State accounted for 72% of the state’s visitors to Tompkins according to the survey sample.

**A.1.3. Visitation Purpose**

Table A.13: Purpose of Trip – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
Exclusive Categories*					
Leisure (general)	66%	51%	25%	47%	42%
Leisure (Unv/Cllg Related)	9%	31%	24%	18%	20%
Prospective Student Tour	17%	3%	18%	11%	15%
Business (Unv/Cllg Related)	1%	2%	11%	8%	7%
Drop-off/Pick Up Student	1%	4%	10%	8%	7%
Other (Unv/Cllg Related)	2%	4%	6%	0%	4%
Business (general)	1%	2%	4%	4%	3%
Other (general)	3%	2%	2%	4%	2%
Total					
General	70%	56%	31%	55%	47%

University/College-Related	30%	44%	69%	45%	53%
Non-Exclusive Categories*					
Leisure**	88%	94%	71%	84%	80%
Business**	17%	13%	39%	23%	28%
Visit Family or Friends	11%	71%	24%	20%	25%
Attend an Event	15%	12%	29%	18%	23%
Conference or Camp (Unv/Cllg)	0%	2%	4%	5%	3%
	n=447	n=162	n=773	n=114	n=1,496
<p>*The exclusive categories do not overlap and therefore sum to 100% whereas the non-exclusive categories may overlap and thus do not sum to 100%.</p> <p>**The leisure and business categories here do not sum from the above categories but also include trips with the purpose of both leisure and business (which are included in one of the 'other' categories in the exclusive categories).</p> <p>Note: Numbers for the exclusive categories may not sum to 100% due to rounding.</p>					

There are a number of ways to classify the purpose of a trip and several questions were asked in the survey toward this end. Several aggregations of these responses are shown in the table above.

The largest aggregation is “university- or college-related” versus “general” (or in other words, not university- or college-related). University- or college-related visits include those for the purpose of a campus tour; dropping off or picking up a student;<sup>48</sup> attending an event, conference, or camp at a university or college; visiting family or friends who work or attend school there; or other such related purposes. University- or college-related visits accounted for 53% of survey respondents—varying from 69% among those staying overnight at hotels or similar establishments to 30% among day trippers.

The “university- or college-related” group is further subdivided into five mutually exclusive categories: prospective student tour, dropping off or picking up a student, leisure only, business only, and other—which includes those stating both leisure and business purposes as well as those not specifying a leisure/business distinction. The “general” group is similarly divided into the mutually exclusive categories of leisure only, business only, and other. Of these eight categories, leisure-general is the largest, accounting for 42% of all survey respondents and varying from two-thirds (66%) of all day trippers to a quarter (25%) of those staying overnight at a hotel or similar establishment.

- Of the eight sub-divisions, respondents in the group dropping off or picking up a student had the highest percentage (69%) reporting household incomes of \$100,000 or more, higher\* than in the percentage in the overall sample (48%).
- Foreign (not Canadian) respondents were more likely\* to be visiting to drop off or pick up a student or for university business (49%) than all other respondents (12%).
- Respondents residing in New York State were more likely\*(54%) to be traveling for general leisure purposes than residents of other localities (30%).

Travelers can also be aggregated into non-exclusive categories, that is, groupings that may overlap. These categories include travelers who stated leisure was all or partly the purpose of their visit to Tompkins County—a group that accounted for 80% of all intercept respondents, varying from 94% of those staying overnight with family

<sup>48</sup> The dropping off or picking up a student category includes those who were attending a university or college graduation.

or friends to 71% of those staying overnight at a hotel or similar establishment. Travelers who reported that business was all or partly the purpose of their visit accounted for 28% of the survey sample—varying from 39% of those staying at a hotel or similar establishment to 13% of those staying with family or friends. One-quarter of respondents stated that at least part of the purpose of their trip was to visit with family or friends. A little less than a quarter of intercept surveys were respondents who stated a purpose of travel related to attending an event. Those attending a conference or camp at a university or college accounted for 3% of the survey sample.

- Leisure travelers were less likely\* to report household incomes of \$100,000 or more (45%) than non-leisure travelers (57%).
- The percentage of respondents who were leisure travelers did not vary remarkably by season, accounting for 77% of December to February visitors, 82% of March to May respondents, 78% of June to August travelers, and 80 of September to November visitors. This was related to how individuals defined themselves as leisure travelers, especially in related to university- or college-related travel. Specifically, among the exclusive categories, the June to August period shows a spike among the general leisure visitors (accounting for 47% of respondents in that period compared to 41% year round) that counters a drop in university- or college-related leisure visitors (accounting for 13% of June to August intercepts compared to 20% year round).
- While 28% of all respondents stated a business purpose of travel, respondents were more likely\* to be traveling from business with origins of the US West (51%), Midwest (43%), and South (36%), as well as those from foreign countries excluding Canada (44%).
- Of those in the survey sample reporting a travel purpose of attending an event, 25% were attending a wedding, 12% were attending a university or college graduation, and 10% were attending an athletic event.<sup>49</sup>

**Table A.14: Motivation for Leisure Travelers – Intercept Survey**

Scale: 5=Very Important...1=Not At All Important

	Average (Scale of 1-5)	5	4	3	2	1	No Answer	
Gorges and State Parks	2.94	27%	16%	13%	7%	35%	2%	n=1,191
Downtown Ithaca and Commons	2.77	19%	17%	19%	11%	33%	1%	n=1,191
Dining and Restaurants	2.73	16%	18%	21%	11%	33%	1%	n=1,191
Cayuga Lake	2.34	14%	11%	16%	9%	48%	2%	n=1,191
Arts, Music, and Theatre	2.02	11%	7%	12%	10%	58%	2%	n=1,191
Wineries	1.96	10%	9%	10%	7%	62%	2%	n=1,191
Discovery Trail and Museums	1.75	7%	6%	9%	10%	65%	4%	n=1,191
B&Bs, Inns, and Resorts	1.70	6%	7%	8%	7%	70%	2%	n=1,191

Leisure travelers were asked to rate eight attributes on a scale of one to five with 5 meaning it was “very important” in helping them decide to visit the Ithaca area and 1 meaning it was “not at all important.” If the “4” rating is taken to mean “somewhat important,” the sum of “4” and “5” ratings would thus be aggregated as meaning “important.” Notably, each of the attributes had a larger percentage of “not at all important” ratings than “very important.” This

<sup>49</sup> These percentages should be taken only as a description of the survey sample and not of the overall visitor profile—the number of wedding responses, for example, was largely dependent upon intercepts conducted at hotels.

points to the great variety of attractors in the county and as well as the prominence of the university/college attractor which was not listed among the attributes.

- Among those respondents not listing any of the attributes as important (that is, as a “4” or “5”), 35% were university- or college-related leisure travelers, 29% were taking a prospective student tour or dropping off or picking up a student, and just 28% were general leisure travelers—a third of which were attending an event and 37% of which were visiting family or friends.
- Among leisure travelers, 20% listed just one attribute as important, 36% listed two or three attributes as important, and 20% listed four or more attributes as important.

The highest rated attributes were led by gorges and state parks (average 2.94 rating), downtown Ithaca and the Commons (2.77), and dining and restaurants (2.73). By this interpretation, even the highest rated attributes were not important to at least half the leisure travelers. On the other hand, the lowest rated attributes each mustered support from a significant sized group: 13% rated B&Bs, inns, and resorts as important; 13% rated the Discovery Trail and museums as important; 19% said wineries were important; 18% said arts, music, and theatre were important; and 25% said Cayuga Lake was important.

Ranking of motivational attributes varies according to where the intercept surveys were collected:

- Looking only at the surveys collected at transportation locations (airport and bus stops), the ranking of attributes is very similar to that in the table above.<sup>50</sup>
- Among intercepts conducted at hotels, downtown and the Commons jumped to the highest ranked attribute; B&Bs, inns, and resorts climbed to #5; and wineries were rated higher than arts, music, and theatre.<sup>51</sup>
- Among intercepts collected at Cornell University and Ithaca College, dining was the top attribute followed by downtown and the Commons; arts, music, and theatre were ranked above Cayuga Lake; and B&Bs, inns, and resorts exceeded wineries and the Discovery Trail and museums.<sup>52</sup>

Among leisure travelers that ranked at least one of the eight attributes (listed in the table above) as important, a higher\* percentage lived in New York state (57%) compared to the survey sample overall (49%).

- Among leisure travelers that ranked at least one of the eight attributes as important, the top metro areas of origin are similar to those of the sample overall. The top five are the same (New York, Binghamton, Rochester, Syracuse, and Philadelphia) while the next five are shuffled a bit compared to the overall sample (Elmira, Buffalo, Washington DC, Boston, and Albany).

<sup>50</sup> The complete rankings are: (1) gorges and state parks, 2.45; (2) dining and restaurants, 2.27; (3) downtown, 2.18; (4) arts, music, and theatre, 1.91; (5) Cayuga Lake, 1.87, (6) wineries, 1.60, (7) B&Bs, inns, and resorts, 1.54; and (8) Discovery Trail and museums, 1.44.

<sup>51</sup> The complete rankings from hotel locations are: (1) downtown, 2.74; (2) gorges and state parks, 2.59; (3) dining and restaurants, 2.58; (4) Cayuga Lake, 2.24; (5) B&Bs, inns, and resorts, 2.22; (6) wineries, 2.13; (7) arts, music, and theatre, 1.80; and (8) Discovery Trail and museums, 1.62.

<sup>52</sup> The complete rankings from university and college locations are: (1) dining, 2.44; (2) downtown, 2.38; (3) gorges and state parks, 2.07; (4) arts, music, and theatre, 1.97; (5) Cayuga Lake, 1.88; (6) B&Bs, inns, and resorts, 1.82; (7) wineries, 1.63; and (8) Discovery Trail and museums, 1.60.

- These leisure travelers (that ranked at least one of the eight attributes as important) were more likely\* to be visiting for non-university- or college-related reasons (63%) compared to the sample overall (47%).

Travelers that ranked certain attributes as important often tended to also rank as important certain other attributes. These “cross-over” patterns are detailed below (and only include those leisure travelers that ranked at least one of the eight attributes as important).

- Cross-over interest exists between wineries and Cayuga Lake. Of those who rated Cayuga Lake as important, 39% rated wineries as important (the highest compared to 25% on average). Of those who rated wineries as important, 52% rated Cayuga Lake as important (the highest compared to 34% on average).
- Cross-over interest exists between the Discovery Trail and museums and arts, music, and theatre. Of those who rated arts, music, and theatre as important, 29% rated the Discovery Trail and museums as important (the highest compared to 17% on average). Of those who rated the Discovery Trail and museums as important, 42% rated arts, music, and theatre as important (the highest compared to 24% on average).
- Cross-over interest exists between dining and restaurants and B&Bs, inns, and resorts. Of those who rated dining and restaurants as important, 25% rated B&Bs, inns, and resorts as important (the highest compared to 17% on average). Of those who rated B&Bs, inns, and resorts as important, 64% rated dining and restaurants as important (the highest compared to 45% on average).
- Cross-over interest exists between dining and restaurants and downtown and the Commons. Of those who rated dining and restaurants as important, 66% rated downtown and the Commons as important (the highest compared to 47% on average). Of those who rated downtown and the Commons as important, 63% rated dining and restaurants as important (the second-highest compared to 45% on average).
- Cross-over interest exists between Cayuga Lake and gorges and state parks. Of those who rated Cayuga Lake as important, 81% rated gorges and state parks as important (the highest compared to 57% on average). Of those who rated gorges and state parks as important, 48% rated Cayuga Lake as important (the second-highest compared to 34% on average.)

### A.1.4. Trip Characteristics

Table A.15: Size of Travel Party – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
1	7%	37%	15%	18%	15%
2	49%	38%	41%	36%	43%
3-4	32%	18%	35%	32%	32%
5-9	10%	7%	8%	10%	9%
10+	2%	0%	2%	4%	2%
Total	100%	100%	100%	100%	100%
	n=448	n=162	n=779	n=114	n=1,503
Average					
Adults	2.34	1.79	2.56	2.98	2.44
Children	0.73	0.38	0.47	0.72	0.56
Total	3.06	2.17	3.04	3.70	3.00

The average travel party consisted of 3.00 individuals, comprising 2.44 adults and 0.56 children. The largest average travel party (3.70) occurred in the other/unknown category (which includes campers) partially due to this

grouping having the highest percentage of travel parties of ten or more people. Those who stayed overnight with family or friends had the smallest average sized travel party (2.17) as this group had the largest percentage of one-person travel parties (37%). The smallest percentage of one-person travel parties (7%) occurred among day trippers—the same group that also had the largest percentage of two-person travel parties (49%) as well as the largest average number of children (0.73).

- Among intercept surveys conducted at university and college locations, the average travel party comprised 2.94 individuals and was largest during the March through May season (3.67 individuals on average).
- The June to August season represented the peak travel party size for intercepts collected at hotels as well as at parks. Average hotel intercept travel parties were 3.16 over the whole year, but 3.95 from June to August. Average park intercept travel parties were 3.49 over the year, but 3.81 from June to August.
- Travel parties were larger on average among general travelers (3.26) compared to university- or college-related travelers (2.78).
- Travel parties whose stated purpose of travel included leisure had an average size of 3.04 persons compared to an average size of 2.75 for parties whose purpose included business.
- By region of residence, travelers from Canada reported the smallest percentage of one-person travel parties (7%) while respondents from non-Canadian foreign countries reported the highest percentage of one-person travel parties (37%).
- By age cohort, the highest percentage of single-person travel parties was among respondents aged 18 to 24 (32%).

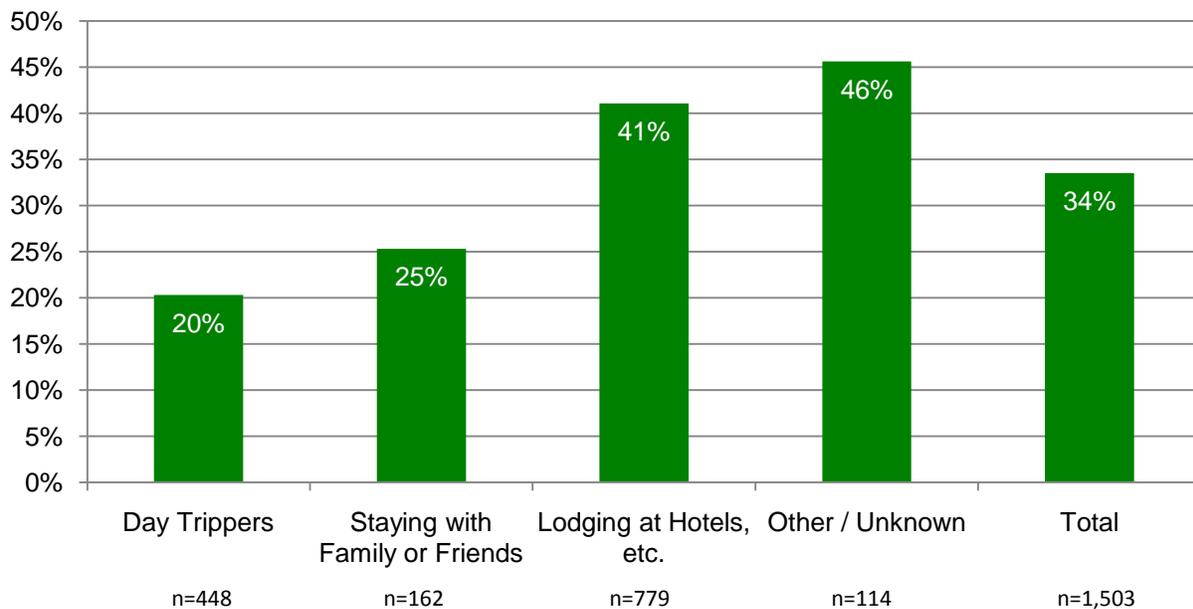
Table A.16: Length of Stay – Intercept Survey					
	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
Nights					
0	100%	0%	0%	0%	30%
1	0%	20%	40%	29%	25%
2	0%	48%	36%	33%	26%
3-4	0%	25%	20%	26%	15%
5-7	0%	5%	4%	8%	3%
8+	0%	2%	1%	4%	1%
Total	100%	100%	100%	100%	100%
	n=448	n=162	n=779	n=114	n=1,503
Average					
Nights	0.00	2.42	2.05	2.68	1.53
Days	1.03	3.00	2.64	3.27	2.25

Note: Numbers may not sum to 100% due to rounding.

The average length of stay among respondents was 2.25 days or 1.53 nights. Day trippers average length of stay was slightly higher than one (1.03) due to the fact that some lodged nearby to Tompkins County and took more than one day trip into the area. Those lodging with family or friends averaged a longer stay (3.00 days) than those staying at a hotel or similar establishment (2.64 days). The other/unknown group had the longest average length of stay (3.27 days).

- Excluding day trippers, the average length of stay was 2.77 days.
- Respondents traveling for a purpose related to the university or college averaged 2.49 days of stay in the area compared to 1.97 days among visitors with non university- or college-related purpose of travel.
- Leisure visitors reported an average length of stay of 2.14 days while those with a business purpose reported an average length of stay of 2.57 days.
- Among all four groups shown above (day trippers, staying with family or friends, lodging at hotels or similar establishments, and other/unknown), the longest average length of stay (among seasonal three-month periods) occurred in the June to August period (2.42 days overall).
- Not surprisingly, average length of stay generally increased with the distance traveled from home. The shortest average length of stays occurred among New York State travelers (1.79 days) while the longest occurred among foreign, non-Canadian travelers (4.34) and US West travelers (3.06 days).

**Figure A.2: Frequency of First-Time Visits to the Ithaca Area - Intercept Survey**



A little over a third (34%) of intercept respondents were first-time visitors to the Ithaca area.<sup>53</sup> Overnighters at hotels or similar establishments consisted of a higher-than-average 41% of first-time visitors. One in four (25%) staying overnight with family or friends were first-time visitors to the Ithaca area and one in five (20%) of day trippers were first-time visitors.

- By three-month season, the number of first-time visitors peaked in the June to August period at 40%. Each of the four categories of visitors experienced a peak in first-time visitors during that period except for those staying with family and friends among whom first-time visitors peaked during the September to November period (35%).

<sup>53</sup> "Ithaca area" is the phrase used in the intercept questionnaire and is synonymous with "Tompkins County."

- By location of interview, first-time visitors were most common among university or college locations (55%) and lowest at downtown locations (26%).
- By age, first-time visitors were more prevalent among younger respondents: 42% of those aged 18 to 24 and 41% of those aged 25 to 34.
- By home region, 19% of New York respondents were first-time visitors compared to 72% of Canadians and 80% of other foreigners.
- By purpose of travel, 39% of visitors with a university- or college-related purpose of travel were first-time visitors, a higher\* percentage than the 27% of those traveling for a purpose unrelated to the university or college.

**Table A.17: Number of Visits to the Ithaca Area in the Last Five Years – Intercept Survey**

	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
1	27%	32%	49%	51%	41%
2	9%	9%	12%	13%	11%
3-4	8%	16%	11%	11%	11%
5-9	11%	16%	12%	10%	12%
10-99	34%	23%	13%	11%	20%
100+	10%	4%	1%	2%	4%
Not Specified	1%	1%	3%	2%	2%
Median	5.0	3.0	1.0	1.0	2.0
	n=448	n=162	n=779	n=114	n=1,503

Note: Numbers may not sum due to rounding.

Among all respondents, 41% stated that the trip into Ithaca that they were currently taking was the only trip to the area in the last five years. However, 36% reported averaging at least one trip per year to the Ithaca area over the past five years and 25% reported averaging at least two trips per year over the same timeframe. Repeat visits were most common among day trippers. Over half of day trippers averaged one or more trips per year into the Ithaca area while 44% averaged two or more trips per year and 10% reported more than 100 trips into the area over the last five years—a rate exceeding once per month.<sup>54</sup>

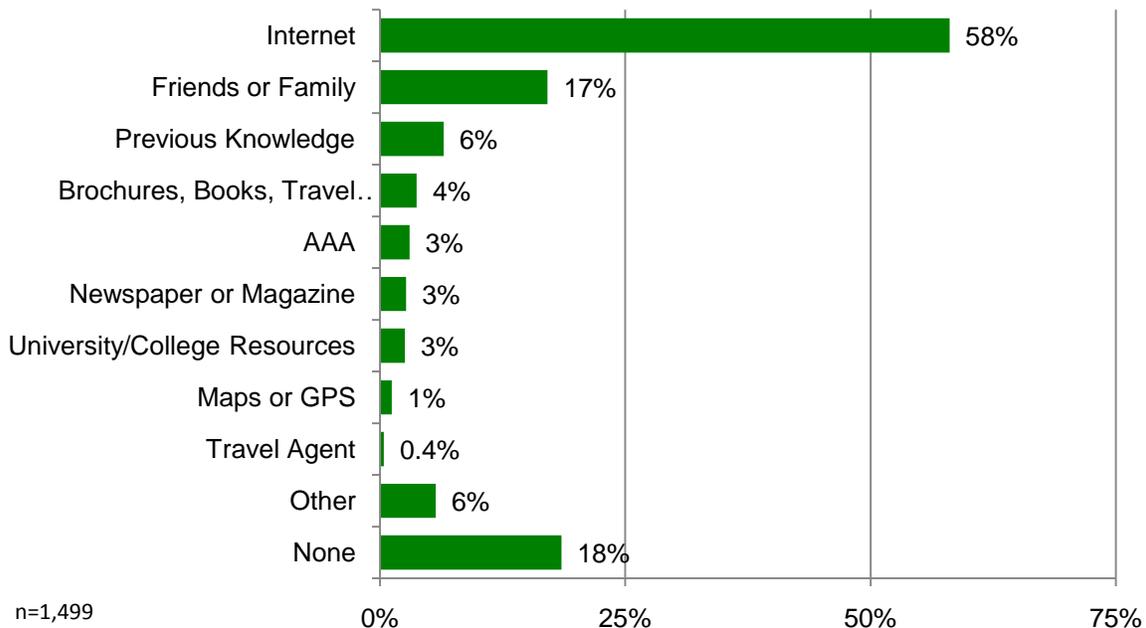
- The average respondent reported a median average two trips to the Ithaca area over the last five years. The median average number of trips was highest among day trippers (5.0) and those staying overnight with family or friends (3.0).
- Those reporting one hundred or more trips into the Ithaca area over the last five years were dominated by those living close to Tompkins County. The top resident counties of these 55 individuals were Broome (8), Cortland (8), Tioga (7), Chemung (6), Cayuga (4), and Onondaga (4).<sup>55</sup>

<sup>54</sup> A rate of 100 per 5 years is about once per every 18 days or 1.67 times per month.

<sup>55</sup> All the counties of residence of these 55 were New York State counties except for one unknown locality and two respondents from Bradford, Pennsylvania.

- Those reporting one hundred or more trips over the last five years consisted of 73% general leisure travelers. Just 18% of those with one hundred or more visits stated they were visiting family or friends during the trip they were interviewed. One-third of this groups stated they were attending an event during the trip they were interviewed.

**Figure A.3: Information Sources Used for Trip Research - Intercept Survey**



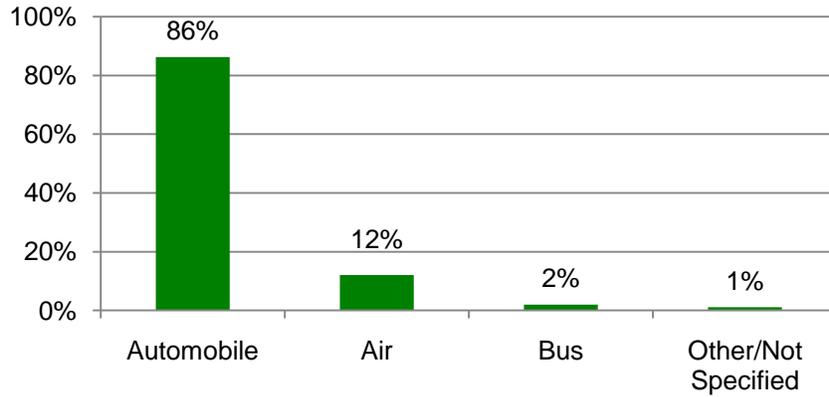
Over half of visitors in the intercept survey (58%) stated that they used the internet to research the Ithaca area for their trip. While 18% said they used no resources for research, it is likely most had previous knowledge of the area for the trip, a fact stated directly by 6% of respondents. Other resources used frequently included family or friends (17%); brochures, books, travel guides, etc. (4%); AAA (3%); a newspaper or magazine (3%); and university or college resources (3%).

- First-time visitors were more likely\* to use the internet for travel research (72%) than repeat visitors (51%).<sup>56</sup>
- Among first-time visitors by age cohort, internet usage for trip research was most popular among those aged 45 to 54 (79%) and those 35-44 (75%) and least popular among those 65 and over (59%) as well as those 18 to 24 (60%).

<sup>56</sup> The percentage of overall travelers using the internet is lower here (58%) than found in the visitors bureau survey (77%). This is not surprising since the visitors bureau survey contained a higher percentage of first-time visitors (52%) compared to the intercept survey (34%)—though this does not account for the entire difference. Another difference is the fact that the visitors bureau survey was written and the “internet” visual cue may have prompted more responses compared to the intercept survey where no response choices were read aloud.

- Among first-time visitors, internet usage for trip research was higher\* among those traveling for university- or college-related reasons (78%) than those not traveling for university- or college-related reasons (62%).
- Note that the sum of percentages shown in the above chart exceeds 100% as some respondents listed more than one resource.

**Figure A.4: Mode of Travel to Tompkins County - Intercept Survey**

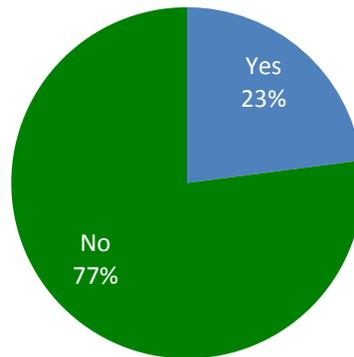


The vast majority of respondents traveled to Tompkins County by automobile (86%). Air travel was used by 12% of respondents (excluding those interviewed at the airport) and bus travel was used by 2% of respondents (excluding those interviewed at bus stops).<sup>57</sup> Note that some air travelers included those traveling by both air and motor vehicle, so not all of these respondents necessarily used the Ithaca Tompkins Regional Airport.

- The percentages shown above do not sum to 100% because respondents were allowed to list more than one mode of travel.
- Travelers by air were more likely\* to be in the Ithaca area for a university- or college-related purpose (72%) than those not traveling by air (50%).
- Bus travelers consisted of a much higher\* percentage of 18 to 34 years old (61%) than non-bus travelers (19%).

<sup>57</sup> Including all respondents, air travel was used by 13% and bus travel by 4%.

**Figure A.5: "Is your trip to the Ithaca area part of a larger trip?" - Intercept Survey**



n=1,503

Twenty-three percent of respondents in the intercept survey stated that their current trip to the Ithaca area was part of a larger trip.

- The percentage of travelers on a trip including locations besides Ithaca was larger\* among those staying overnight at hotels and similar establishments (26%) and smaller\* among day trippers (19%) and those staying with family or friends (16%).
- Within the survey sample, a slightly higher percentage (25%) of those traveling for university- or college-related reasons were taking a larger trip as opposed to those traveling for general reasons (21%).
- Those taking a prospective student tour at a university or college were much more likely\* (46%) to be on a larger trip compared to the remainder of the respondents (19%).

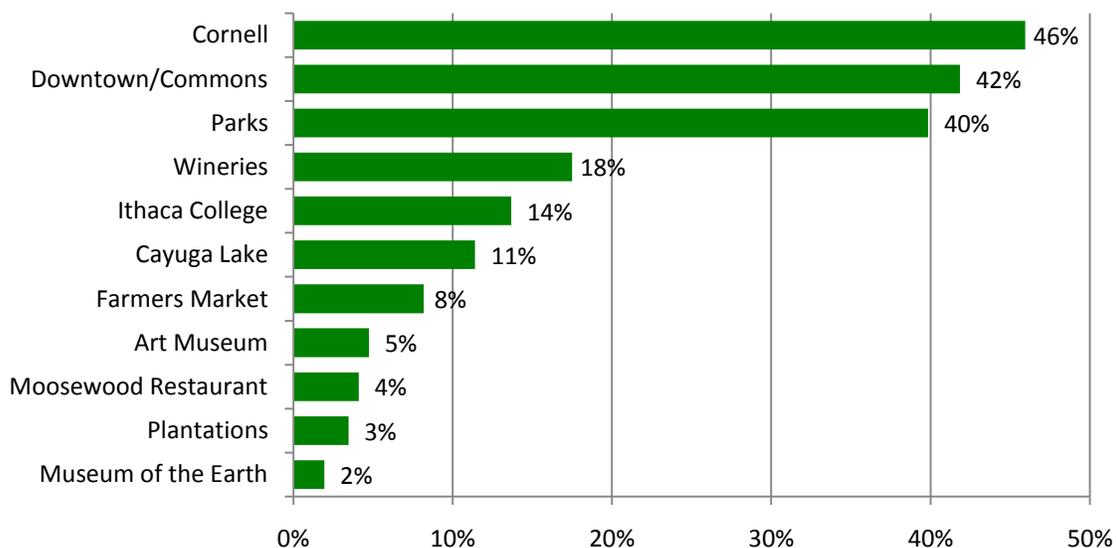
Other Localities on Trip Itineraries That Included Ithaca		
	n	% of All
Syracuse	49	3%
New York City	45	3%
Niagara Falls	42	3%
Boston	29	2%
Rochester	29	2%
Watkins Glen	23	2%
Toronto	18	1%
Binghamton	17	1%
Philadelphia	16	1%
Albany	15	1%
Buffalo	14	<1%
Corning	14	<1%
Hamilton	11	<1%
Cortland	10	<1%
Washington DC	8	<1%
Cleveland	7	<1%
Chicago	7	<1%
Oneonta	7	<1%

Pittsburg	7	<1%
Seneca Falls	7	<1%
Waterloo	7	<1%
Clinton	6	<1%
Elmira	6	<1%
Schenectady	6	<1%
Troy	6	<1%
Other	477	-
		n=1,503

Cities on trip itineraries that included the trip to Ithaca are dominated by New York locations. Syracuse was in the top spot with 3% of all responses closely followed by New York City and Niagara Falls, each also with approximately 3% of all responses. Boston was tied for fourth on the list and is an exception among the top localities due to its lack of proximity to Ithaca. However, Boston is the location of universities and colleges and so likely gathered responses from those individuals touring schools in multiple cities—a little over half of respondents also visiting Boston said they came to Ithaca for a prospective student tour.

### A.1.5. Trip Activities

Figure A.6: Locations Visited on Current Trip\* - Intercept Survey



\*Data are weighted averages of intercept survey data. Respondents were asked what locations they visited or planned to visit.

Since the intercept surveys were conducted at attractions and other locations in Tompkins County, using direct results from the surveys to measure attraction attendance among visitors would reflect the skew of the collection methods—that is, locations where the surveys were conducted would be prone to inflated attendance data. Therefore, the data presented above reflects a weighting of survey results that blends results from surveys

excluding the location in question with results at the attraction.<sup>58</sup> Note that the question used to gather attendance data asked what attractions or places respondents visited or planned to visit on the current trip in the Ithaca area.

According to the intercept survey results, the location most visited was Cornell University, seen by 46% of visitors. Note that this includes leisure visitors, business visitors, parents picking up or dropping off students for school, and prospective students touring the university. The next-two most popular locations for visitors in Ithaca were downtown Ithaca and the Commons, seen by 42% of visitors, and parks—which for this purpose includes the state parks as well as Stewart Park and Cass Park—seen by 40% of visitors.

After these top three visitor locations, there is a considerable drop-off in popularity. The fourth-most popular attraction is wineries, seen by about 18% of visitors. Note that many of the wineries referred to by survey respondents are likely not within Tompkins County but are generally in the “Ithaca area” loosely defined according to visitor perceptions.<sup>59</sup> Following wineries in popularity was Ithaca College, seen by 14% of visitors—which, like the case of Cornell, includes campus tours, dropping off and picking up students, and other college events. The next-most popular locations were Cayuga Lake (11%) and the Farmers Market (8%).

Note that visitation at the Johnson Art Museum and the Cornell Plantations was recorded separately than Cornell in general. When locations visited were asked about in the intercept surveys, a list of responses was not provided for respondents. So even though responses for the Art Museum and Plantations were recorded separately than responses for Cornell, it is possible that some respondents thought of these two attractions as part of Cornell, did not explicitly mention even though they visited them, and thus resulting in undercounting of attendance.

The following break-out statistics represent data direct from the intercept surveys, not weighted according to the above method. These break-outs are not presented to show absolute attendance data, but rather variation of characteristics of visitors at specific locations:

- State parks, waterfalls, and gorges:
  - More likely\* to be visited by general travelers (52%) as opposed to those traveling for a university- or college-related purpose (27%)
  - More likely\* to be visited by first-time visitors (44%) than repeat visitors (36%)
  - Among general travelers, more likely\* to be visited by visitors aged 18 to 54 (55%) than those aged 55 and up (46%)
  - Among general travelers, more likely\* to be visited by traveling parties with children under age 18 (60%) than those without children (49%)
  - More likely\* to be visited by leisure travelers than non-leisure (45% to 17%) and less likely\* to be visited by business travelers than non-business (21% to 46%)
  - Less likely\* to be visited by those traveling to attend an event (33%) than those not traveling to attend an event (41%)

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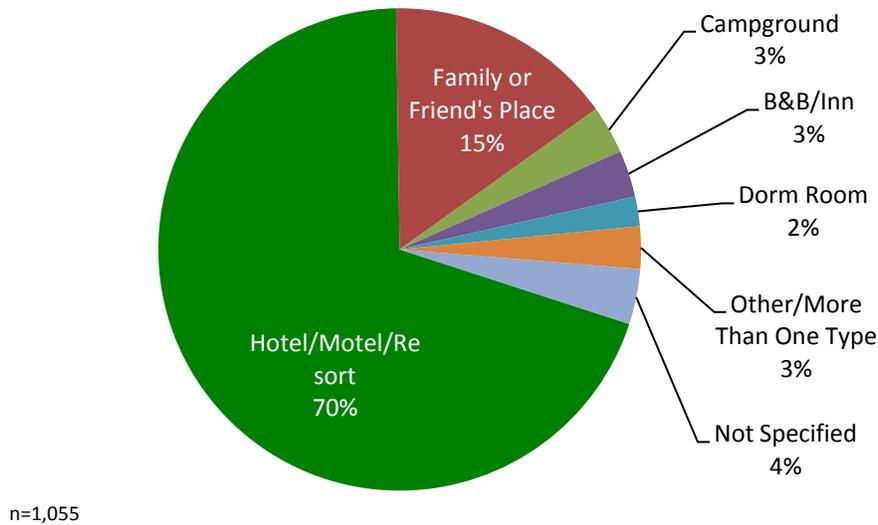
<sup>58</sup> This weighting process resulted in adjusted attendance percentages that differed from direct survey results by no more than plus or minus four percentage points. This rather small adjustment implies the overall sample distribution was fairly representative, at least in terms of accurately capturing visitor activities.

<sup>59</sup> This was one difficulty of the data collection process, that visitors would not know the borders of the study area of Tompkins County. Therefore, the “Ithaca area” was used as a descriptor for the intercept survey process knowing that certain results—such as for the wineries in the attraction question, would reflect visitor patterns extending outside the Tompkins County border.

- Attendance was more likely\* in the summer months and less likely\* in the winter. Excluding surveys conducted at the state parks, 34% of other June to August intercepts visited the locations opposed to 15% of December to February intercepts and 29% overall.
- After excluding university- or college-related travelers, likelihood of visiting the state parks was fairly even across all household income groups
- Among the four break-out categories of visitors, visitation frequency was 56% among other/unknown (the group that includes campers), 49% among those staying with family or friends, 38% among day trippers, and 35% among those staying at a hotel or similar establishment
- Downtown Ithaca and the Commons
  - Virtually no difference in likelihood of visitation between general travelers and those traveling for university- or college related reasons
  - More likely\* to be visited by those aged 18 to 35 (58%) and less likely\* to be visited by those 65 years old and up (33%)
  - More likely\* to be visited by leisure travelers than non-leisure (48% to 36%) and less likely\* to be visited by business travelers than non-business (39% to 48%)
  - Attendance was less likely\* in the winter. Excluding surveys conducted at downtown locations, 26% of other December to February intercepts visited the location opposed to 37% year round
  - Among the four break-out categories of visitors, visitation frequency was 52% among those staying with family or friends, 47% among those staying at hotels or similar establishments, 46% among other/unknown, and 40% among day trippers
  - Attendance by traveling parties with children under 18 did not differ by a statistically significant amount from those parties without children
- Cornell University and Ithaca College
  - Though overwhelmingly visited by those on university- or college-related visits, also visited by 17% of those visiting for general purposes (that is, not university- or college-related)
  - More likely\* visited by those aged 45-54 (65%) than other age cohorts (45%)
  - More likely\* than average to be visited by those staying overnight at hotels and similar establishments (67%) and less likely\* than average visited by those in the area on a day trip (29%)
  - Much more likely\* to be visited by traveling parties with one child under 18 (74%)
  - More likely\* visited by first-time visitors (65%)
- Wineries
  - More likely\* to be visited by general travelers (20%) than those traveling with a university- or college-related purpose (10%)
  - Among general travelers, more likely\* to be visited by traveling parties without children under 18 (22%) than those with children (12%)
  - Among general travelers, more likely\* to be visited by first-time visitors (32%) than repeat visitors (15%)
  - Among general travelers, variation in attendance by age cohort of respondent was not statistically significant; however, among travelers with university- or college-related purposes, visitation of wineries was more likely among those aged 25 to 34 (16%) compared to all other cohorts (9%)
  - More likely\* to be visited by those attending a wedding (25%) than otherwise (14%)
  - Among the four break-out categories of visitors, visitation frequency was 23% among other/unknown, 17% among those staying with family or friends, 16% among those staying at a hotel or similar establishment, and 9% among day trippers
  - Among overnight visitors, more likely\* to be visited by those staying at a B&B (32%) than those lodging elsewhere (16%)

**A.1.6. Lodging**

**Figure A.7: Overnight Lodging Types - Intercept Survey**



Among all survey respondents staying overnight in Tompkins County, 70%<sup>60</sup> stayed at a hotel, motel, or resort. The second-most popular type of lodging was a family or friend’s place, used by 15% of overnight respondents. Other lodging arrangements included campgrounds (3%), B&Bs or inns (3%), dorm rooms (2%), or miscellaneous other types or more than one type (3%).

- Excluding responses gathered at hotel locations, the most frequently mentioned hotels used by survey respondents were the following: Holiday Inn, Hilton Garden Inn, Hampton Inn, Comfort Inn, Statler Hotel, Best Western, Clarion, Super 8, Ramada Inn, Marriott Courtyard, Econo Lodge, Country Inn and Suites, Meadow Court, Homewood Suites, La Tourelle, and the Rodeway Inn.
- The top written-in responses among the ‘other’ type of lodging were boat (4 respondents), rental house (4), cabin/cottage (3), and university apartment (3).

Table A.19: Lodging Type of Day Trippers – Intercept Survey	
Day Trip from Home	82%
Lodging Away from Home	16%
Not Specified	2%
Total	100%
	n=448

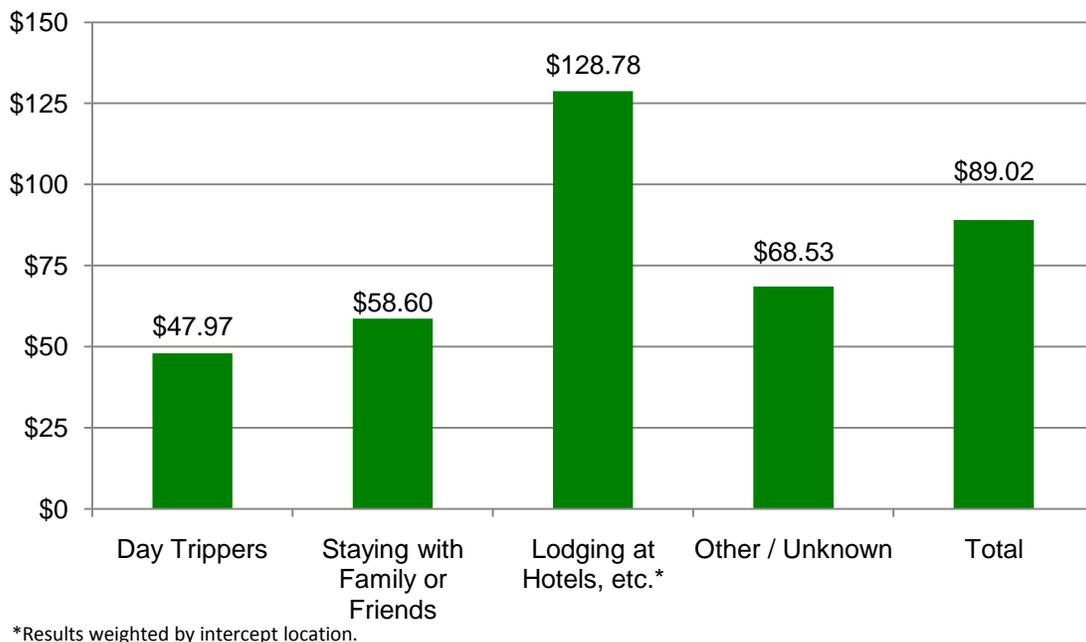
<sup>60</sup> This percentage is meant to describe the survey sample in this case and not project the mix of lodging use by Tompkins County visitors. See Section 6 for such a projection.

While most day trippers into Tompkins County took the trip from their homes, 16% took the trip from a place of lodging away from home. These individuals were asked where they were lodging, the type of their lodging, and why they chose to stay outside of Tompkins County instead of lodging in the county.

- Among the 70 respondents taking day trips into Tompkins and lodging away from home, the most popular places of lodging were Cortland (6 responses), Watkins Glen (5), Auburn (3), Binghamton (3), Rochester (3), and Sampson State Park (3).
- Among those taking day trips into Tompkins and lodging away from home, nearly half (49%) stayed at a hotel or similar establishment (motel, resort, inn, or B&B), 27% stayed at a family or friend’s place, 7% lodged overnight at a campground, 6% used other miscellaneous lodging facilities, and 11% did not specify.
- When the day trippers were asked why they did not stay in Tompkins County (excluding those staying with family and friends and those that did not respond), the most frequent responses were that their lodging was closer to other destinations that were part of their trip (60%), and other miscellaneous reasons (28%) that included travel-related reasons such as ‘just passing through’ or ‘came in last night; traveled as far as we could.’<sup>61</sup> Only two respondents (5%) said that everything (in Tompkins County) was booked and just one respondent cited the cost (meaning Ithaca was too expensive or other lodging was more economical).

### A.1.7. Spending

Figure A.8: Average Spending per Person per Day - Intercept Survey



<sup>61</sup> Other miscellaneous reasons included not knowing much about the Ithaca area, liking the owner of a B&B where the respondent had stayed before, and camping at Sampson as the size makes it easy to accommodate large groups of students.

Average spending per person per day averaged \$89.02<sup>62</sup> per survey respondent. By far, the highest spending occurred among those lodging at hotels and similar establishments (\$128.78) and was lowest among those staying with family or friends (\$58.60) and day trippers (\$47.97).

- As expected, average spending varied with household income. Per person per day spending was highest among those with household income of \$150,000 or more (\$148.74) and lowest among those with household income less than \$20,000 (\$49.23).
- Likewise, as household income increases along with age among working aged individuals, average spending per person per day did as well: from \$53.93 among those aged 18 to 24 to \$116.87 among those aged 55 to 64.
- By location of interview, average per person per day was lower than average at state park locations, the bus station, the Museum of the Earth and the Plantations and higher than average at hotels, the airport, and the Moosewood Restaurant.
- By gender, per person per day spending was slightly higher among female respondents (\$99.57) than males (\$94.63).
- Those traveling for a university- or college-related purpose spent more on average per person per day (\$120.20) than those not traveling for such a purpose (\$74.37). Those dropping off or picking up a student had higher than average spending (\$151.09)<sup>63</sup> and those on a prospective student tour had lower than average spending (\$83.16).
- First-time visitors spent similarly to repeat visitors on a per person per day basis. Those reporting 100 or more trips over the last five years to the Ithaca area spent reported lower-than-average spending per person per day (\$58.62) on their trip during the interview.
- Spending per person per day varied inversely with the size of the traveling party—meaning, in general, the smaller the traveling party, the higher the per person per day spending.
- Those with a business purpose of travel averaged a higher-than-average \$124.88 per person per day spending while those with a leisure purpose spent an average \$92.75 per person per day.

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<sup>62</sup> This average is derived from a weighting of survey results. The bullet point break-outs of average spending are based on un-weighted survey results which have an average of \$98.07 per person per day spending.

<sup>63</sup> The spending figures for those picking up or dropping off students was boosted by the subgroup of those attending graduation ceremonies which average even higher per person per day spending of \$168.11. Also, note that per the intercept survey instructions, school supplies such as books were not included in the spending figures.

**Table A.20: Average Spending – Intercept Survey**

	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.*	Other / Unknown	Unweighted Sample Total
<b>Lodging***</b>	\$0.00	\$0.00	\$309.02	\$266.18	\$180.36
per person	\$0.00	\$0.00	\$136.00	\$70.57	\$75.84
per night	\$0.00	\$0.00	\$159.86	\$85.38	\$89.33
per person/night	\$0.00	\$0.00	\$65.86	\$22.48	\$35.84
% points/rewards	0%	0%	2%	0%	1%
% not recorded	0%	0%	13%	43%	10%
<b>Food and Drink***</b>	\$47.77	\$149.97	\$260.46	\$257.14	\$184.90
per person	\$18.86	\$86.11	\$99.10	\$81.15	\$72.42
per day	\$45.41	\$52.30	\$105.91	\$84.64	\$80.48
per person/day	\$18.03	\$28.78	\$40.41	\$28.99	\$31.62
% not recorded/unknown**	1%	1%	2%	4%	2%
<b>Local Transportation***</b>	\$6.59	\$27.28	\$41.96	\$39.22	\$29.44
per person	\$2.70	\$14.96	\$20.06	\$17.10	\$14.02
per day	\$6.45	\$8.69	\$15.44	\$10.81	\$11.63
per person/day	\$2.67	\$4.75	\$7.44	\$4.51	\$5.48
% not recorded/unknown**	1%	0%	4%	1%	2%
<b>Shopping***</b>	\$42.85	\$105.01	\$180.03	\$129.35	\$127.54
per person	\$21.39	\$59.50	\$71.34	\$42.76	\$53.19
per day	\$40.49	\$38.28	\$66.38	\$39.83	\$53.66
per person/day	\$19.76	\$21.51	\$26.35	\$15.01	\$23.03
% not recorded/unknown**	6%	2%	4%	6%	4%
<b>Entertainment and Attractions***</b>	\$7.78	\$14.60	\$13.02	\$11.08	\$11.48
per person	\$2.62	\$8.46	\$5.50	\$4.52	\$4.88
per day	\$7.72	\$5.03	\$5.60	\$3.54	\$6.02
per person/day	\$2.60	\$2.81	\$2.41	\$1.47	\$2.44
% not recorded/unknown**	2%	2%	2%	2%	2%
<b>Other***</b>	\$5.22	\$3.30	\$10.14	\$1.39	\$7.27
per person	\$4.93	\$2.84	\$3.36	\$0.33	\$3.54
per day	\$5.20	\$0.95	\$3.39	\$0.63	\$3.46
per person/day	\$4.92	\$0.75	\$1.11	\$0.16	\$2.14
% not recorded/unknown**	1%	2%	2%	2%	2%
<b>Total***</b>	\$110.20	\$300.17	\$814.62	\$704.36	\$540.98
per person	\$50.50	\$171.87	\$335.35	\$216.44	\$223.90
per person/day****	\$47.97	\$58.60	\$128.78	\$68.53	\$89.02
	n=448	n=162	n=779	n=114	n=1,503

\*Lodging and food and drink spending by the 'Lodging at Hotels, etc' group is a weighted average of those intercepted at hotels and those intercepted elsewhere.

\*\*Unknown spending in some categories may include removed outlier data.

\*\*\*These spending figures are per traveling party per trip.

\*\*\*\*Lodging spending per night figures are translated into per day figures for computing this sum.

Lodging spending averaged \$35.84 per person per night. This expense was non-existent among day trippers and those lodging with family and friends, but accounted for \$65.86 per person per night among those staying overnight at hotels or similar establishments.<sup>64</sup> The average traveling party spent \$180.36 in all for lodging expenses during the entire trip to Tompkins County (33% of all expenses).

Food and drink was the largest expense for traveling parties in Tompkins County, averaging \$184.90 in total for the entire trip (34% of all expenses). Per person, per day, however, this expense of \$31.62 was slightly lower than average lodging expenses per person per night. Food and drink spending per person per day varied from \$18.03 among day trippers to \$40.41 among those staying overnight at hotels or similar establishments.

Shopping was the third-largest expense category among Tompkins County visitors, amounting to an average of \$127.54 per traveling party per trip (24% of all expenses) or \$23.03 per person per day. Shopping spending was highest among those staying at hotels or similar establishments (\$26.35 per person per day). The shopping category was described in the questionnaire as including gifts, clothing, and personal items.<sup>65</sup>

Local transportation spending was \$29.44 per traveling party per trip, or 5% of all expenses. Local transportation expenses were described in the survey as including car rental, taxi, and gas. Local transportation costs averaged \$5.48 per person per day and varied from \$2.67 among day trippers to \$7.44 among those staying at hotels or similar lodging establishments.

Entertainment and attractions accounted for an average of \$11.48 of spending per traveling party for the entire trip—amounting to 2% of all spending in Tompkins County. Entertainment and attraction spending was highest among those staying with family and friends (\$2.81 per person per day), followed by day trippers (\$2.60) and then those lodging at hotels and similar establishments (\$2.41).

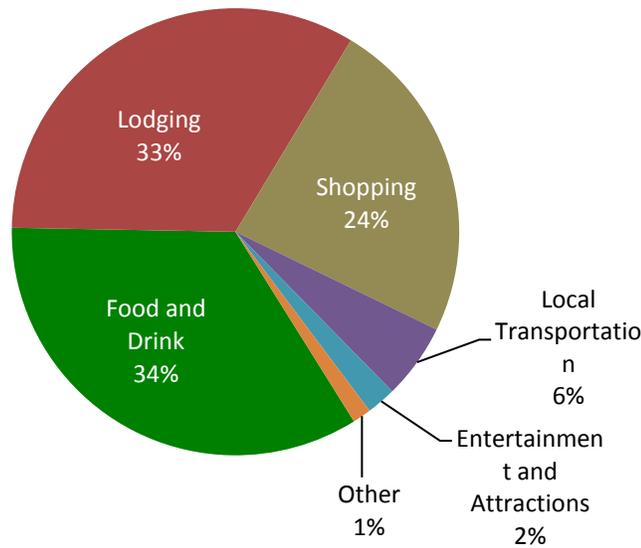
“Other” spending accounted for all other spending done during travel to Tompkins County. This category amounted to \$7.27 per travel party, about 1% of all expenses. Average spending in this category was highest among day trippers but this was largely due to one respondent.

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<sup>64</sup> The Smith Travel Research report indicates that the average room rate in 2009 was \$120. The estimate calculated here of \$65.86 is per person per night. Assuming the average number of guests per room is 1.4 to 2.0, the average room rate, implied from the survey results, will fall between \$92 and \$132 per night.

<sup>65</sup> Purchase of school supplies for students attending a Tompkins County college were not counted for this category.

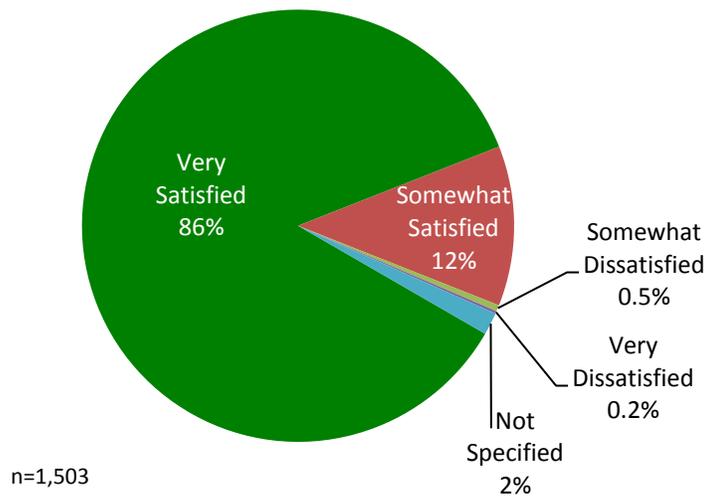
**Figure A.9: Share of Total Traveling Party Spending - Intercept Survey**



Overall, average spending per traveling party per trip amounted to \$540.98. Food and drink accounted for the largest share of expenses (34%) followed by lodging (33%) and shopping (24%). Entertainment and attractions accounted for just 2% of traveler spending in Tompkins County, a figure at first sight fairly low. However, besides a number of prominent attractions in the county being free (such as the parks and gorges), other “attractions” are related to food or shopping, such as wineries, restaurants (such as the Moosewood), and the Commons (spending at which shows up under both shopping and food and drink).

**A.1.8. Satisfaction**

**Figure A.10: Trip Satisfaction - Intercept Survey**



Trip satisfaction was very high among respondents in the intercept survey. A total of 86% were very satisfied and 12% were somewhat satisfied. Less than 1% of respondents were dissatisfied; specifically, 0.5% said they were somewhat dissatisfied and 0.2% said they were very dissatisfied.

<b>Table A.21: Trip Satisfaction – Intercept Survey</b>						
	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not Specified	
Unweighted Sample Total	86%	12%	0.5%	0.2%	2%	n=1,503
<b>Exclusive Purpose Categories*</b>						
Other (general)	91%	6%	2.9%	0.0%	0%	n=34
Leisure (Unv/Cllg Related)	90%	8%	0.7%	0.0%	1%	n=297
Leisure (general)	88%	11%	0.5%	0.0%	1%	n=623
Other (Unv/Cllg Related)	85%	11%	0.0%	0.0%	3%	n=623
Business (Unv/Cllg Related)	84%	12%	0.0%	1.0%	3%	n=102
Drop-off/Pick Up Student	84%	14%	0.0%	0.0%	2%	n=99
Business (general)	79%	17%	0.0%	2.1%	2%	n=48
Prospective Student Tour	77%	19%	0.4%	0.4%	3%	n=231
Sub-total: General	87%	11%	0.6%	0.1%	1%	n=705
Sub-total: University/College-Related	84%	13%	0.4%	0.3%	2%	n=798
<b>Non-Exclusive Purpose Categories*</b>						
Attend an Event	91%	8%	0.3%	0.0%	1%	n=338
Visit Family or Friends	90%	8%	0.3%	0.3%	1%	n=368
Leisure**	88%	10%	0.4%	0.1%	1%	n=1,191
Business**	81%	15%	0.2%	0.5%	3%	n=426
Conference or Camp (Unv/Cllg)	78%	17%	0.0%	0.0%	5%	n=41
<b>Exclusive Visit-Type Categories*</b>						
Stay with Family/Friends	93%	6%	0.6%	0.6%	0%	n=162
Other	89%	9%	0.9%	0.0%	1%	n=114
Day Trippers	86%	12%	0.4%	0.0%	2%	n=448
Stay at Hotel, etc.	84%	14%	0.4%	0.3%	2%	n=779
*The exclusive categories do not overlap and therefore sum to 100% whereas the non-exclusive categories may overlap and thus do not sum to 100%.						
**The leisure and business categories here do not sum from the above categories but also include trips with the purpose of both leisure and business (which are included in one of the 'other' categories in the exclusive categories).						

Satisfaction was similar among those traveling with a university- or college related purpose (84% very satisfied) with those traveling for a general purpose (87% very satisfied). More muted satisfaction, however, was found among respondents on a prospective student tour (77% very satisfied) as well as those on general business trips (79% very satisfied). Those staying overnight with family or friends had the highest rate of being very satisfied at 93%.

**Table A.22: Top Aspects of the Ithaca Area Enjoyed the Most – Intercept Survey**

Natural Scenery	37%
State Parks, Waterfalls, Gorges	20%
Cornell	16%
Downtown	13%
Dining/Restaurants/Food	13%
Friendly People	9%
Cayuga Lake	6%
Weather	6%
Family	5%
Wineries	5%
	n=1,503

In an open-ended question (which allowed more than one response), respondents were asked exactly what aspects of Ithaca did they enjoy most. The natural scenery was cited by 37% of respondents and 20% said they most enjoyed the state parks, waterfalls, or gorges. Other frequent responses were Cornell (16%), downtown (13%), dining/restaurants/food (13%), and the friendly people (9%). There were many responses that were hard to classify that cited aspects of the area such as: ambiance, atmosphere, culture, diversity, peaceful, laid back, quaint, and artistic. Respondents also cited aspects such as specific attractions, shopping, driving/walking around, their lodging accommodations, entertainment, festivals, and architecture.

**Table A.23: Top Aspects of the Ithaca Area Not Enjoyed – Intercept Survey**

Roads and Traffic	17%
Weather	7%
Accommodations	4%
Parking	3%
Cost	2%
Downtown/Commons	2%
Construction	2%
Restaurants/Food	1%
Shopping	1%
People	1%
Public Transportation	1%
	n=1,503

The aspects not enjoyed by visitors were headed by roads and traffic (17%) with an additional 3% complaining about parking and 2% citing construction. Weather was an aspect not enjoyed and cited by 7% of respondents. Other aspects not enjoyed included accommodations (4%), cost (2%), and downtown/Commons (2%).

**Table A.24: Likelihood of Returning to the Ithaca Area in the Next Five Years for a Leisure-Oriented Trip – Intercept Survey**

	Day Trippers	Staying with Family or Friends	Lodging at Hotels, etc.	Other / Unknown	Unweighted Sample Total
Definitely	75%	76%	47%	59%	60%
Probably	12%	13%	20%	17%	17%
Might/Might Not	10%	7%	18%	13%	14%
Probably Will Not	2%	2%	11%	7%	7%
Definitely Will Not	0%	1%	2%	4%	2%
Not Specified	1%	1%	1%	1%	1%
	n=448	n=162	n=779	n=114	n=1,503

	First-Time Visitors		Repeat Visitors		Unweighted Sample Total
	Leisure	Non-Leisure	Leisure	Non-Leisure	
Definitely	35%	16%	81%	44%	60%
Probably	28%	26%	10%	19%	17%
Might/Might Not	23%	36%	5%	19%	14%
Probably Will Not	10%	16%	3%	12%	7%
Definitely Will Not	2%	3%	1%	5%	2%
Not Specified	1%	3%	0%	2%	1%
	n=345	n=159	n=846	n=153	n=1,503

Note: Numbers may not sum due to rounding.

Respondents were asked if it was likely that they would return to the Ithaca area for a leisure-oriented trip within the next five years. Over three-fourths of respondents said they probably or definitely would return while less than 10% said they probably or definitely would not return. Overall, 60% of survey respondents stated they definitely would return, and this ranged from 76% of those staying with family and friends and 75% of day trippers to 47% of those staying at hotels or similar establishments.

- Those traveling on university- or college-related business were more likely\* to say they probably or definitely would not return for a leisure trip within the next five years (10%) compared to those not traveling for university- or college-related reasons (6%).
- People traveling for leisure purposes were less likely\* (6%) than average to say they probably or definitely will not return while those traveling for business purposes were more likely\* (13%) to say they probably or definitely would not return.
- The likelihood of returning shown here is inflated due to the large number of repeat visitors. Among repeat leisure visitors, 81% said they definitely would return. In contrast, 16% of first-time non-leisure visitors said they definitely would return. Nevertheless, 42% of non-leisure first-time visitors said they probably or definitely would return to the Ithaca area in the next five years for a leisure-oriented trip.

## A.2. Household Survey

### A.2.1. Methodology

The purpose of the household survey was to examine visitors to Tompkins County that stay at households. Many such visitors might spend most of their time at a household, may not go to typical tourist attractions, and therefore could not be interviewed through an intercept survey. Nevertheless, these visitors may engage in significant activities in the county—particularly those that impact the economy such as shopping and dining. Therefore, a survey of households was undertaken to survey Tompkins County residents about the volume, frequency, and nature of their overnight visitors.

From a sampling of residential households in Tompkins County,<sup>66</sup> calls were placed using a stratified random sampling technique. That is, in order to obtain a survey sample similar to the county population, targeted number of responses were obtained according to two key demographic categories—age and income—while within those categories, sampling was done randomly.

The survey was conducted in January and February 2009.<sup>67</sup> Successful contact was made with persons at 418 households;<sup>68</sup> of these, 6 calls were terminated due to not meeting survey qualifications<sup>69</sup> and 181 declined to participate. The remaining 231 cooperated for a 55.3% participation rate. Among these responses, eight were removed from the final sample due to incomplete responses on crucial questions regarding overnight visitors. The resultant usable sample of 223 responses yields a sampling error of  $\pm 6.5\%$  with 95% confidence. Results presented below that compare subgroups and are statistically significant with 95% or higher confidence are marked with an asterisk.

### A.2.2. Demographics

Male	43%
Female	57%
Total	100%
	n=223

The survey sample was composed of 57% females and 43% males. It was anticipated that gathering responses from males would be difficult, and so extra effort was made to gather responses from males in order to get a nearly even spread by gender.

<sup>66</sup> The residential sample was purchased from a commercial vendor.

<sup>67</sup> The survey was conducted by WB&A of Ithaca, New York under the direction of Chmura Economics & Analytics.

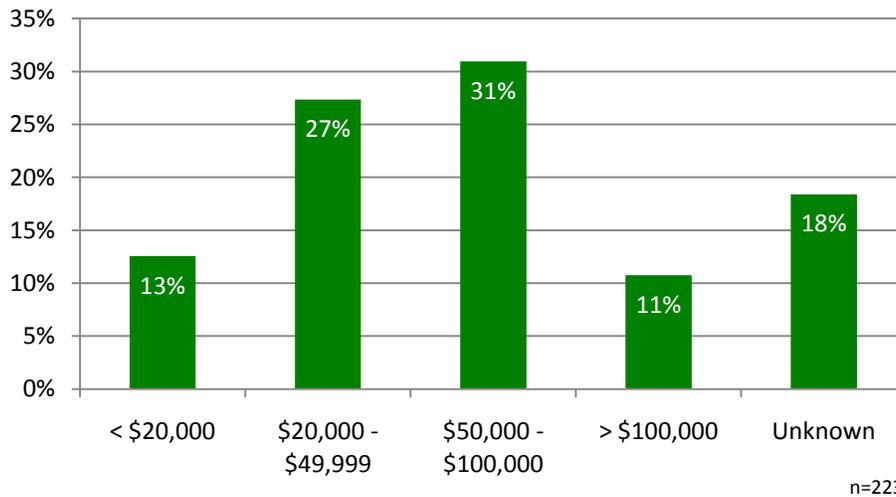
<sup>68</sup> The 'successful contact' figure excludes business/government telephone numbers and cases where a language barrier existed.

<sup>69</sup> Survey qualifications were that the respondent was age 18 years or older and was currently a resident of Tompkins County.

Table A.26: Age - Tompkins County – Household Survey		
	Survey Sample	Census Bureau <sup>70</sup>
18-24	2%	13%
25-44	39%	39%
45-64	39%	32%
65+	18%	16%
Unknown	1%	-
Total	100%	100%
	n=223	
Note: Numbers may not sum due to rounding.		

By age, the survey sample compares well with the general population except in the age 18-24 cohort which composed 2% of the survey sample but 13% of population. The small representation in the youngest age cohort correlates with a relatively small representation in the survey contact list due to high transiency in this cohort as well as high cell phone usage. This discrepancy will be partially made up for in the student survey which will capture some responses from this cohort which is relatively large in Tompkins County due to the student population—for comparison purposes, the 18-24 cohort accounts for 5% of householders in the nation, less than half the size than in Tompkins County.

**Figure A.11: Household Income - Household Survey**



According to the US Census 2006-2008 American Community Survey, Tompkins County had approximately 37,749 households with median household income of \$47,770. This average was closely adhered to in the survey sample with 40% having household incomes below \$50,000 and 42% having household incomes above \$50,000. Household income information was not provided by 18% of respondents.

- The top income bracket had a higher percentage\* of males (63%) compared to the remainder of the sample (40%).

<sup>70</sup> Census Bureau figures are per the 2006-2008 American Community Survey, table B19037.

- Income generally increases with age among working-age individuals. This was also true in the survey sample\* where 45-64 year olds accounted for 51% of households with income of \$50,000 or more compared to 32% of households with less than \$50,000 in income.

Table A.27: Type of Phone – Household Survey	
Cell Phone	1%
Land Line	99%
Total	100%
	n=223

Table A.28: "Are you a student at Cornell University, Ithaca College, or TC3?" – Household Survey	
Yes	3%
No	97%
Total	100%
	n=223

The surveys were largely conducted on land lines as opposed to cell phones. The resultant skew due to not having cell phone responses in a telephone survey was explored in a 2006 Pew Research Center study which showed for a large variety of questions that blending cell-only respondents into a land line sample would not change response percentages by more than 2 percentage points.<sup>71</sup>

Seven (3%) of the 223 respondents were also a student at Cornell University, Ithaca College, or TC3 during the survey, representing a small overlap with the student survey conducted in May 2009.

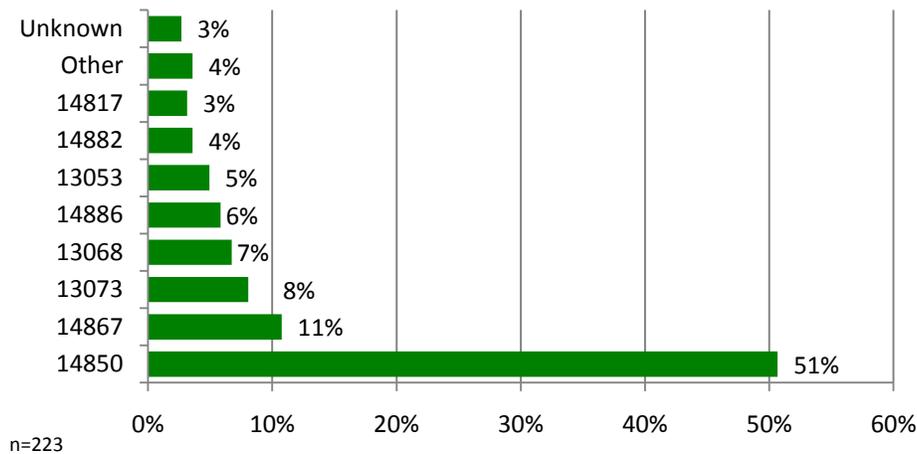
Table A.29: "Did you reside in Tompkins County for all of 2008?" – Household Survey	
Yes	93%
No	6%
Unknown	< 1%
Total	100%
	n=223

Ninety-three percent of respondents resided in Tompkins County for all of 2008. The 6% of respondents who did not reside in the county for the entire year reported on average residing in the county for six months in 2008. For the entire sample, the average respondent resided in the county for 11.6 months.

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<sup>71</sup> For further details, see "How Serious is Polling's Cell-Only Problem?" by Scott Keeter, Director, Survey Research, Pew Research Center, June 20, 2007.

**Figure A.12: Zip Codes of Respondents - Household Survey**



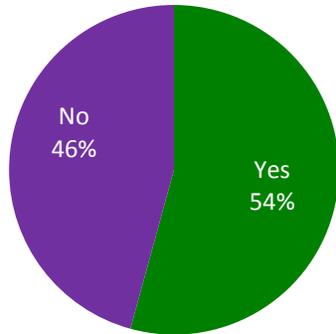
By zip code, a little over half (51%) of the respondents reported residing in 14850 which includes most of the city of Ithaca. Within the sample, this zip code accounted for a higher percentage of individuals age 44 or lower (46%) compared to the other zip codes (36%). According to 2000 US Census, zip code 14850 accounted for 55% of the non-college student population in Tompkins County, similar though slightly higher than the percentage of households in the survey sample.

Table A.30: "Did a member of your household spend any nights at a lodging establishment in Tompkins County in 2008?" – Household Survey	
Yes	4%
No	96%
Total	100%
	n=231

Four percent of respondents reported a member of their household spending at least one night at a lodging establishment in Tompkins County in 2008. In fact, members of these households spent an average 3.1 nights at county lodging establishments during the year. For the entire sample, the average household spent 0.13 nights at Tompkins County accommodations in 2008.

**A.2.3. Overnight Visitors**

**Figure A.13: Households with Overnight Visitors in 2008 - Household Survey**

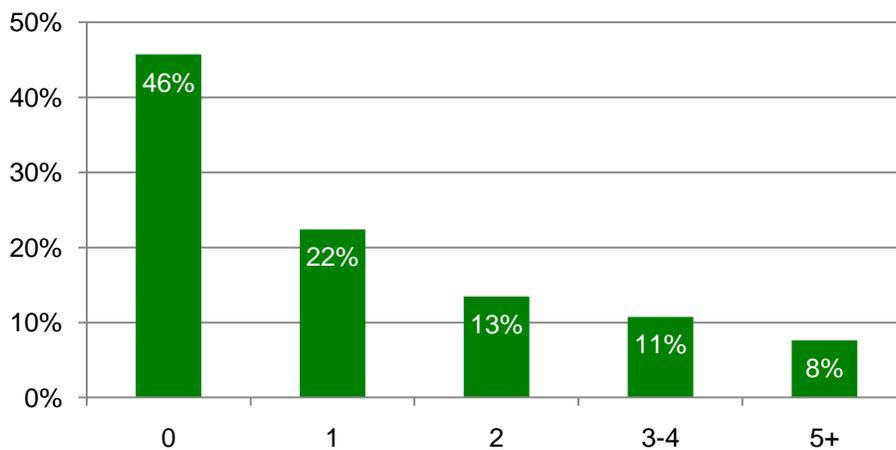


n=223

More than half (54%) of surveyed households in Tompkins County reported hosting an overnight, out-of-town visitor in 2008. For purposes of the survey, “out-of-town visitors” was defined as people who do not live, work, or go to school in Tompkins County.

- Householders of age 25-44 residing in zip code 14850 were much more likely\* to host an overnight, out-of-town visitor in 2008 (80%) compared to all others (47%). Householders of age 65 and up living outside of zip code 14850 were much less likely\* (21%) to host such visitors compared with all others (57%).
- Within the sample, the likelihood to have hosted overnight, out-of-town visitors in 2008 increased\* with household income from 47% among households with annual income less than \$50,000 to 65% among households with income from \$50,000 to less than \$100,000 to 83% among households with income of \$100,000 or higher.

**Figure A.14: Number of Overnight Visits in 2008 - Household Survey**

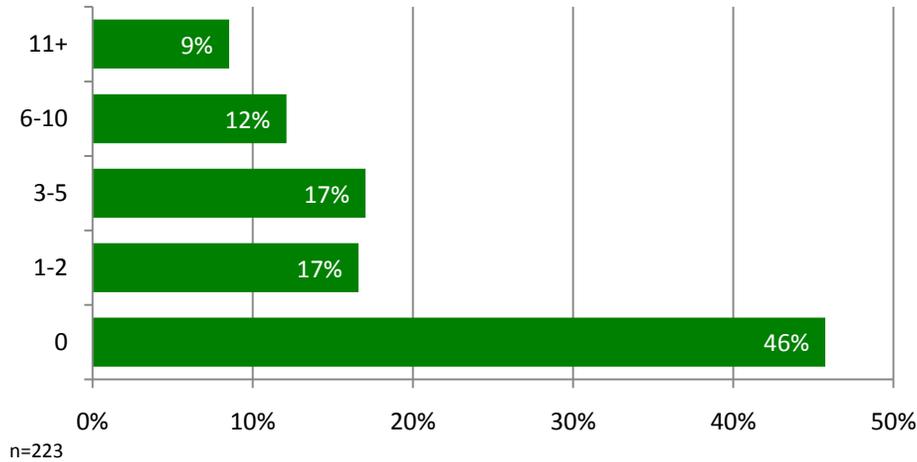


n=223

The respondent reported 311 overnight, out-of-town visits in 2008 for an average of 1.39 per household. Among the entire sample, 22% of respondents reported one such visit in 2008, 11% reported two overnight, out-of-town visits, 11% said they had three to four of these visits, and 8% reported five or more overnight, out-of-town visits in the year.

- The average number of visits was highest (2.92) among households with income of \$100,000 or greater and lowest among households with income of less than \$20,000 (0.61).

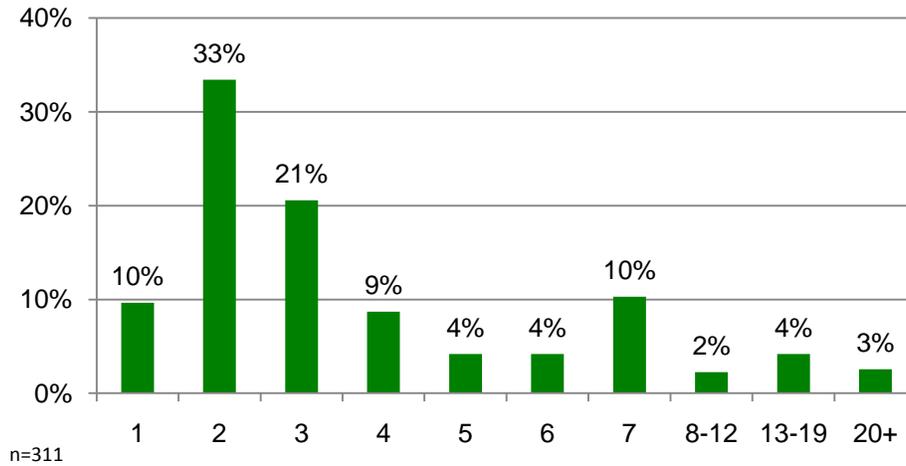
**Figure A.15: Number of Overnight Visitors in 2008 - Household Survey**



Survey respondents reported an average of 3.53 overnight, out-of-town visitors (adults and children) in 2008. This works out to an average of 2.53 visitors per visit. Nine percent of the respondents reported hosting eleven or more overnight, out-of-town visitors in 2008 while 12% reported hosting six to ten. Seventeen percent of respondents reported hosting three to five such visitors during the year while the same percentage hosted one to two.

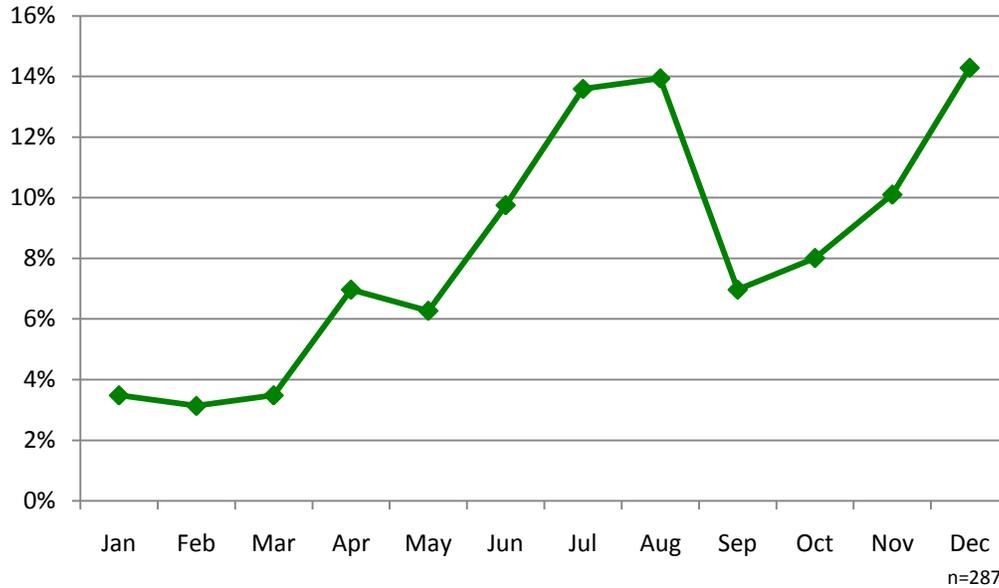
- By age of householder, the average number of visitors in 2008 was highest among householders of age 24-44 (4.60) and lowest among those of age 18-24 (1.20).
- By annual household income of the host, the average number of visitors was highest among respondents with income of \$100,000 or greater (8.04) and lowest among those with income of less than \$20,000 (1.43).

**Figure A.16: Number of Nights per Visit - Household Survey**



The average overnight, out-of town visit lasted 4.51 nights. A third (33%) of the visits lasted two days, 21% lasted three days, 10% lasted 1 week, and another 10% lasted 1 day. Overall, 19% of overnight visits lasted seven nights or longer.

**Figure A.17: Household Overnight Visits by Month - Household Survey**

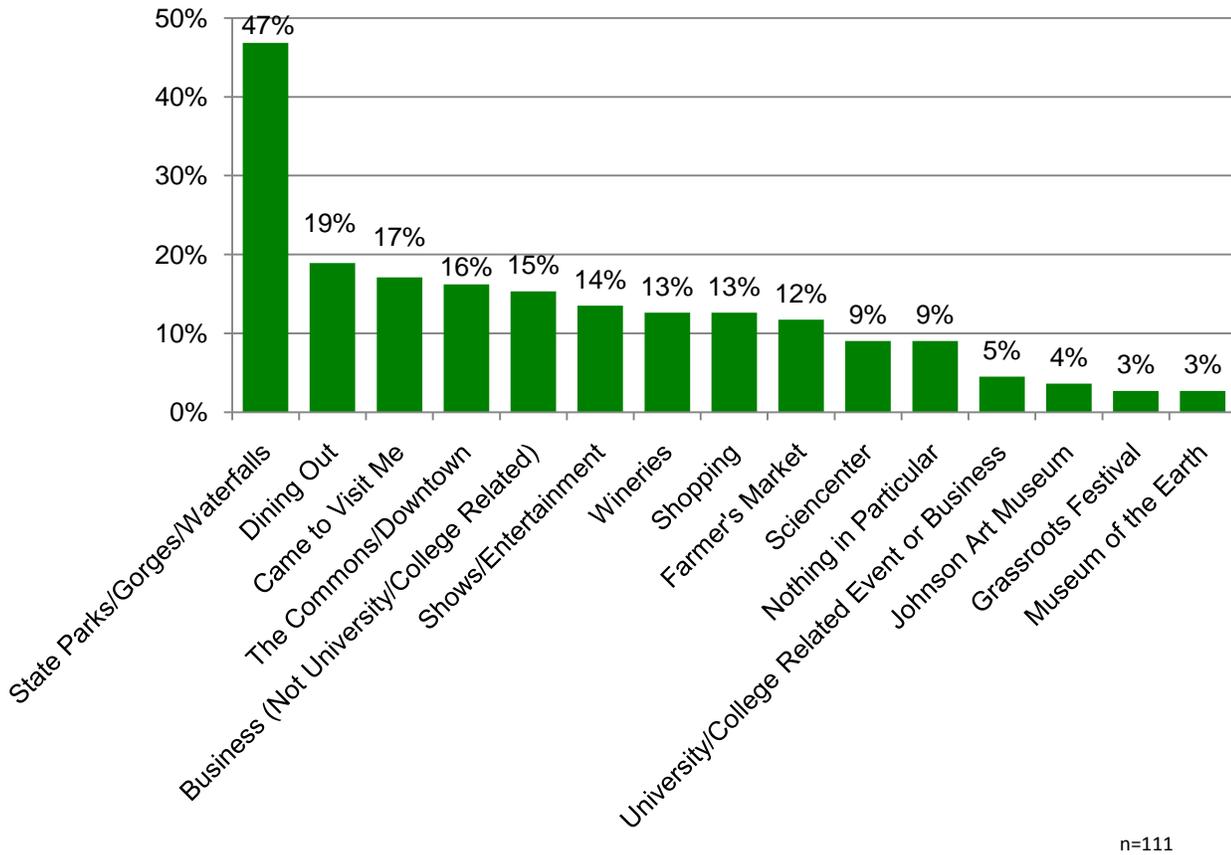


For 287 of the visits, timing of the visit was reported by month. Of these, the three months accounting for the largest percentage of visits were December, August, and July (14% of visits for each month). The fewest visits were reported in the winter months of January, February, and March.

### A.2.4. Visitor Activities

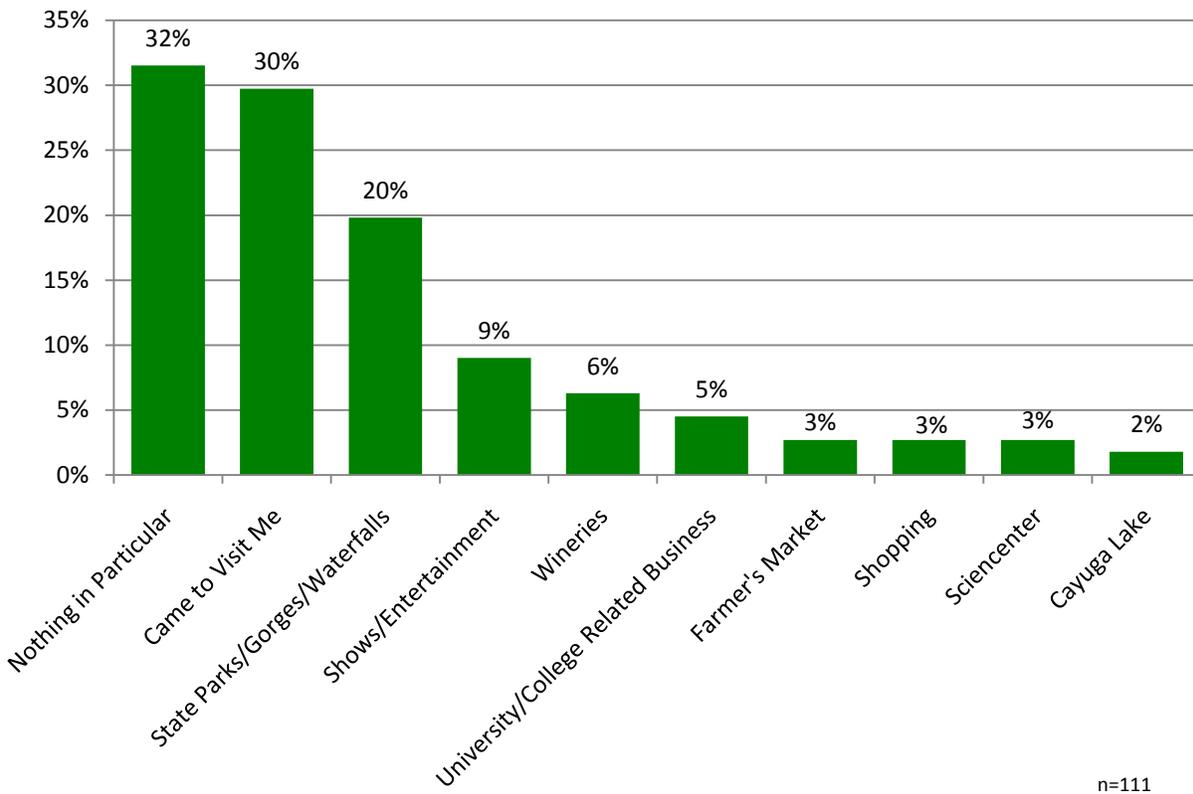
Collecting detailed information about the activities and motivation of individual household visitors was deemed to be too burdensome to be asked of the respondents, so this information was asked about in general for household guests in 2008. This information is used to roughly compare with the activities and motivations of intercepted county visitors in order to note and account for any large differences.

**Figure A.18: Activities of Overnight Household Guests - Household Survey**



Respondents were asked to report what their overnight guests actually did or saw when they visited in 2008. Not all respondents provided answers for this and some respondents gave more than one answer. From the 111 respondents who provided information, state parks/gorges/waterfalls was cited by 47% of respondents. The next-most popular responses were dining out (19% of respondents), 'came to visit me' (17%), the commons/downtown (16%), and business, not university/college-related (15%). Note that a list of possible answers was not provided to the respondents, but rather they question was open-ended and the responses were classified by the interviewee or later in analysis. Also note that the above chart does not have the complete list of responses, but only those cited by 3% or more of respondents that provided this information.

**Figure A.19: Travel Motivation of Overnight Household Guests - Household Survey**



Respondents were asked what motivated the visit of their overnight, out-of-town guests, regardless of what was actually done during the visit. More than one answer was allowed. Of the 111 respondents who answered this question, the leading visit motivations provided were ‘nothing in particular’ (32% of respondents) and ‘came to visit me’ (30%). The next-most popular motivating factors were state parks/gorges/waterfalls (20%) followed by shows/entertainment (9%) and wineries (6%).

### A.3. Student Survey

#### A.3.1. Methodology

The purpose of the student survey was to examine visitors to Tompkins County that stay with college students that reside in the county in order to gauge the volume, frequency, and nature of such overnight visitors.

The survey was conducted in late April and early May 2009 via intercept interviews.<sup>72</sup> A third of the interviews were conducted in May with the rest in April. The interviews took place on the Cornell Campus (accounting for 63% of the interviews), in downtown Ithaca (34%), and at Stewart Park (3%). Since Cornell students outnumber Ithaca College students by a three-to-one margin, a similar mix of students was targeted for interviewing. Only students at least 18 years old were allowed to be interviewed.

<sup>72</sup> The survey was conducted by WB&A of Ithaca, New York under the direction of Chmura Economics & Analytics.

One hundred four responses were gathered. One response was removed from consideration as an outlier and two other responses were removed to prevent overlap with the household survey analysis as these students lived in their own permanent residence in Tompkins County. The resultant sample of 101 responses yields a sampling error of approximately  $\pm 9.7\%$  with 95% confidence. Results presented below that compare subgroups and are statistically significant with 95% or higher confidence are marked with an asterisk.

### A.3.2. Demographics

Table A.31: Gender – Student Survey	
Female	57%
Male	43%
Total	100%
	n=101

The survey sample was composed of 57% females and 43% males. According to Fall 2008 enrollment figures from the National Center for Education Statistics (NCES), the combined undergraduate population of Cornell University and Ithaca College was composed of 51% females.

Table A.32: School – Student Survey	
Cornell University	77%
Ithaca College	23%
Total	100%
	n=101

The survey sample included 77% Cornell students with the remaining 23% being Ithaca College students. Based on Fall 2008 NCES enrollment data, Ithaca students accounted for 24% of the combined Cornell-Ithaca student population.

Table A.33: Year of School – Student Survey	
Freshman	25%
Sophomore	15%
Junior	19%
Senior	14%
Graduate Student	28%
Total	100%
	n=101
Note: Numbers may not sum due to rounding.	

Table A.34: Age – Student Survey	
18	15%
19	17%
20	16%
21	19%
22-24	11%
25-29	17%
30-34	6%
Total	100%
	n=101
Note: Numbers may not sum due to rounding.	

Twenty-eight percent of the student's interviewed were graduate students. This is similar to the 26% mix of graduate students in the combined Cornell-Ithaca College student population according to Fall 2008 enrollment data from the NCES. All of the graduate students in the sample attended Cornell.<sup>73</sup>

About two-thirds (66%) of the students interviewed were aged 18 to 21. Of the remaining students, 28% were 22 to 29 years old and the remaining 6% were 30 to 34 years old. All students age 25 or older in the sample were graduate students. No students under 18 were interviewed per the survey methodology.

<b>Table A.35: Semesters Attended in the Last Academic Year – Student Survey</b>	
Fall and Spring	82%
Summer, Fall, and Spring	13%
Spring Only	4%
Fall Only	1%
Total	100%
	n=101

The majority of the students interviewed (82%) attended school in only the Fall and Spring semesters of the 2008-2009 academic year. Another 13% attended in those semesters as well as the Summer 2008 semester. The remaining 5% attended in only the Fall or Spring semester.

<b>Table A.36: Place of Residence – Student Survey</b>	
On Campus	67%
Off Campus	33%
Total	100%
	n=101

Any student that lived outside Tompkins County, lived with a relative who is a permanent resident of Tompkins County, or lived in their own permanent residence in the county was excluded from the survey. Of the survey sample, two-thirds (67%) rented on campus, in other words, lived in a dorm, apartment, or house on campus. All freshmen in the sample were on-campus residents. The remaining students (33%) rented off campus, in other words, lived in a dorm, apartment, or house off campus.

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<sup>73</sup> Cornell students accounted for 94% of the combined Cornell-Ithaca College graduate student population per Fall 2008 NCES data.



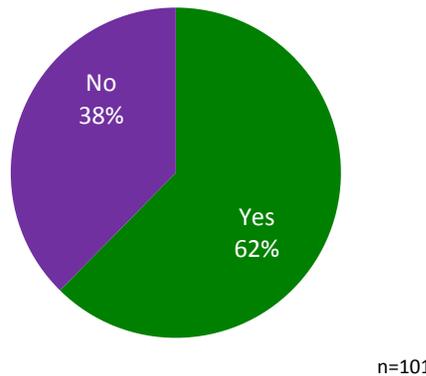
Table A.37: "Did you spend any nights at a lodging establishment in Tompkins County in the last academic year?" – Student Survey	
Yes	14%
No	86%
Total	100%
	n=101

Fourteen percent of respondents reported spending at least one night at a lodging establishment in Tompkins County in the 2008-2009 academic year. These students spent an average 2.7 nights at county lodging establishments during the year. For the entire sample, the average student spent 0.38 nights at Tompkins County accommodations in the 2008-2009 academic year.

- Of the fourteen respondents that spent at least a night at accommodations in the county, five were freshman and three were graduate students. Some of these students may have stayed at an accommodation when first arriving in the county, before moving into their regular student housing.
- Within the sample, those living on campus were more likely to have spent nights at a Tompkins County lodging establishment (19%) compared to those living off campus (3%).

### A.3.3. Overnight Visitors

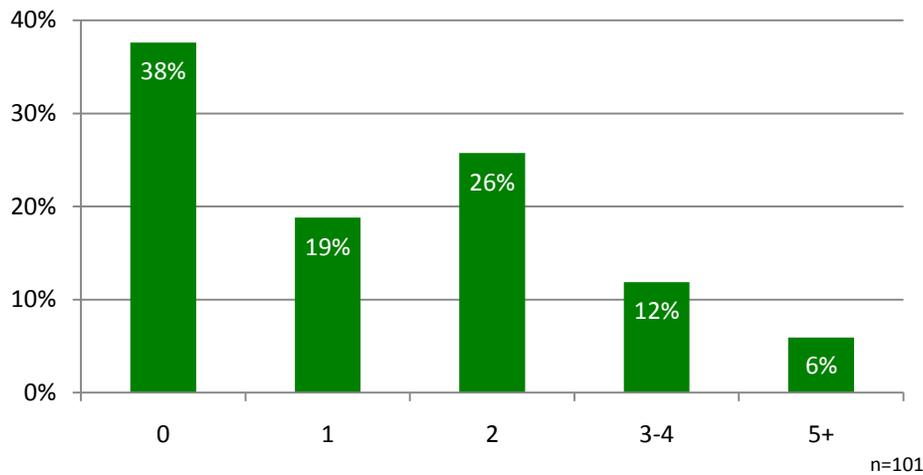
**Figure A.20: Students with Overnight Visitors in the 2008-2009 Academic Year - Student Survey**



More than six of ten (62%) surveyed students in Tompkins County reported hosting an overnight, out-of-town visitor in the 2008-2009 academic year. For purposes of the survey, "out-of-town visitors" was defined as people who do not live, work, or go to school in Tompkins County.

- Students who were sophomores, juniors, or seniors were much more likely\* (83%) to have overnight visitors than freshmen and graduate students (43%).
- Within the sample, 56% of students living on campus had overnight visitors compared to 76% of students living off campus.

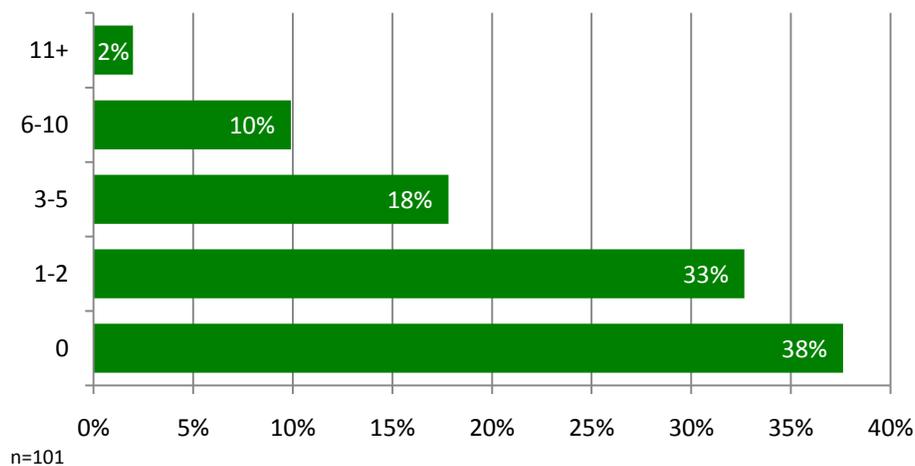
**Figure A.21: Number of Overnight Visits in the 2008-2009 Academic Year - Student Survey**



The respondents reported 162 overnight, out-of-town visits in the 2008-2009 academic year for an average of 1.60 visits per student. Among the entire sample, 26% of respondents reported two such visits in 2008, 19% reported one overnight, out-of-town visit, 12% said they had three to four of these visits, and 6% reported five or more overnight, out-of-town visits in the year.

- The average number of visits was highest (2.00) among juniors and lowest among freshmen (1.24).
- Students living on campus averaged 1.47 visits, less than the 1.88 average number of visits of students living off campus.

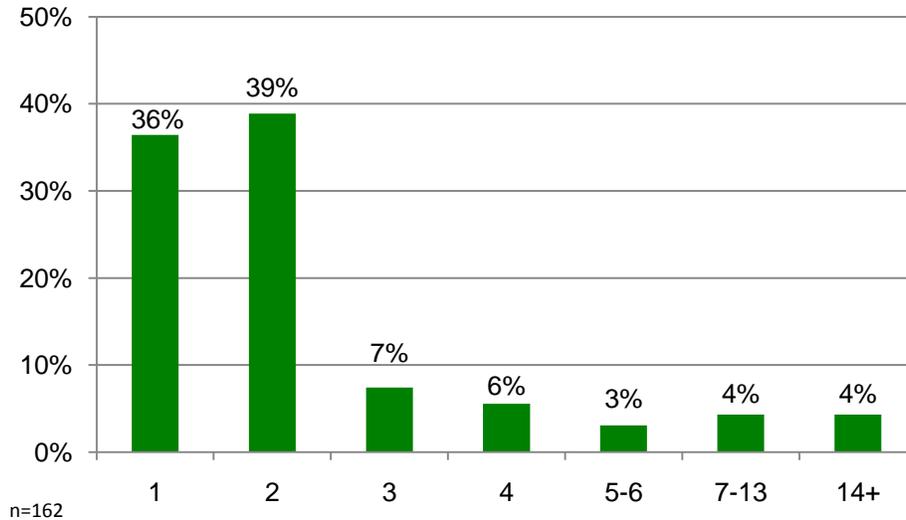
**Figure A.22: Number of Overnight Visitors in the 2008-2009 Academic Year - Student Survey**



Survey respondents reported an average of 2.29 overnight, out-of-town visitors (adults and children) in the 2008-2009 academic year. This works out to an average of 1.43 visitors per visit. Two percent of the respondents reported hosting eleven or more overnight, out-of-town visitors in the academic year while 10% reported hosting six to ten. Eighteen percent of respondents reported hosting three to five such visitors during the year and 33% hosted one to two.

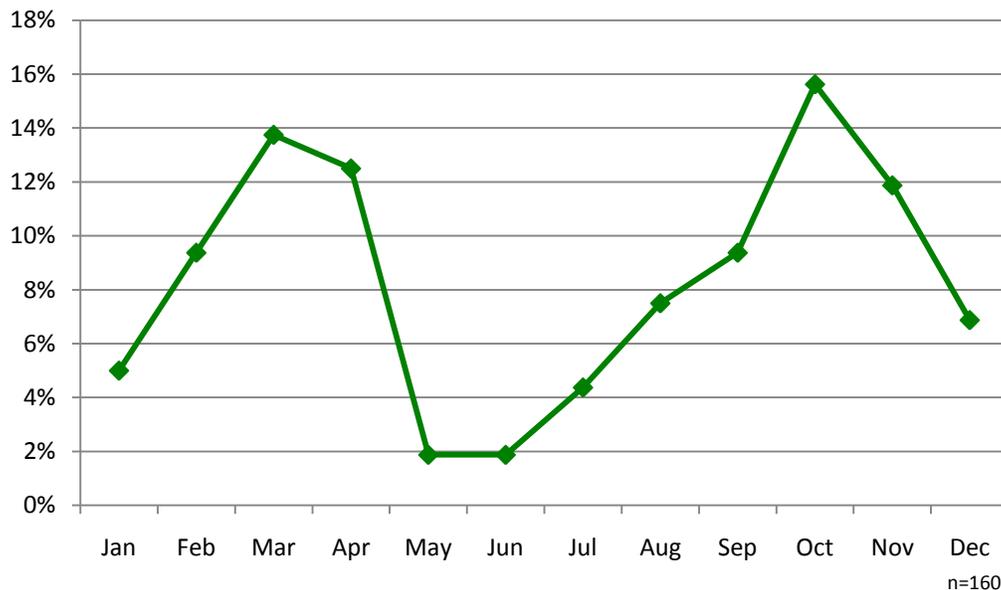
- By student year, the average number of visitors in the 2008-2009 academic year was highest among juniors (3.16) and lowest among freshmen (1.36).
- On-campus residents averaged 2.16 visitors in the year compared to 2.55 among off-campus residents.

**Figure A.23: Number of Nights per Visit - Student Survey**



The average overnight, out-of town visit lasted 3.07 nights. Thirty-nine percent of the visits lasted two days, 36% lasted one day, and the remaining 25% lasted three or more days.

**Figure A.24: Student Overnight Visits by Month - Student Survey**

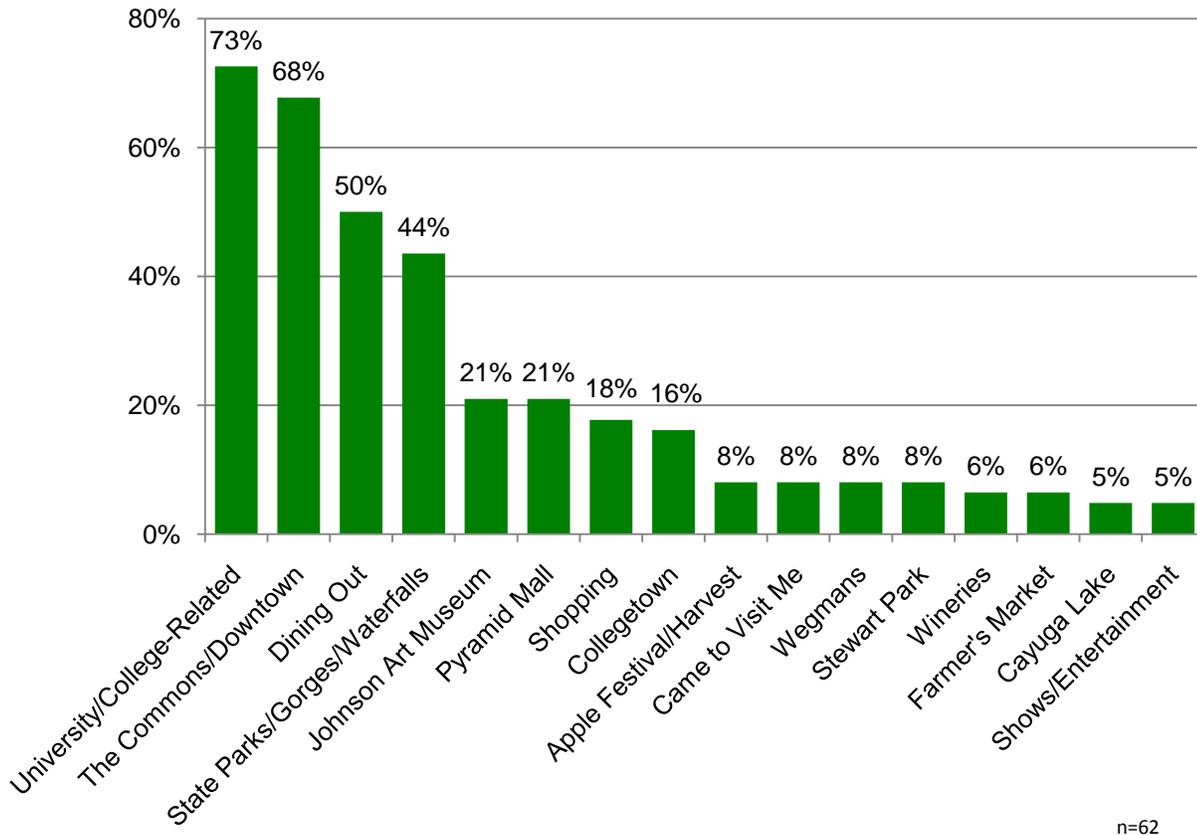


For 160 of the 162 visits described by student respondents, timing of the visit was reported by month. October was the month with highest visitation (16% of visits) followed by March (14%), April (13%), and November (12%). May and June (2% each) were the months with the lowest number of visits.

### A.3.4. Visitor Activities

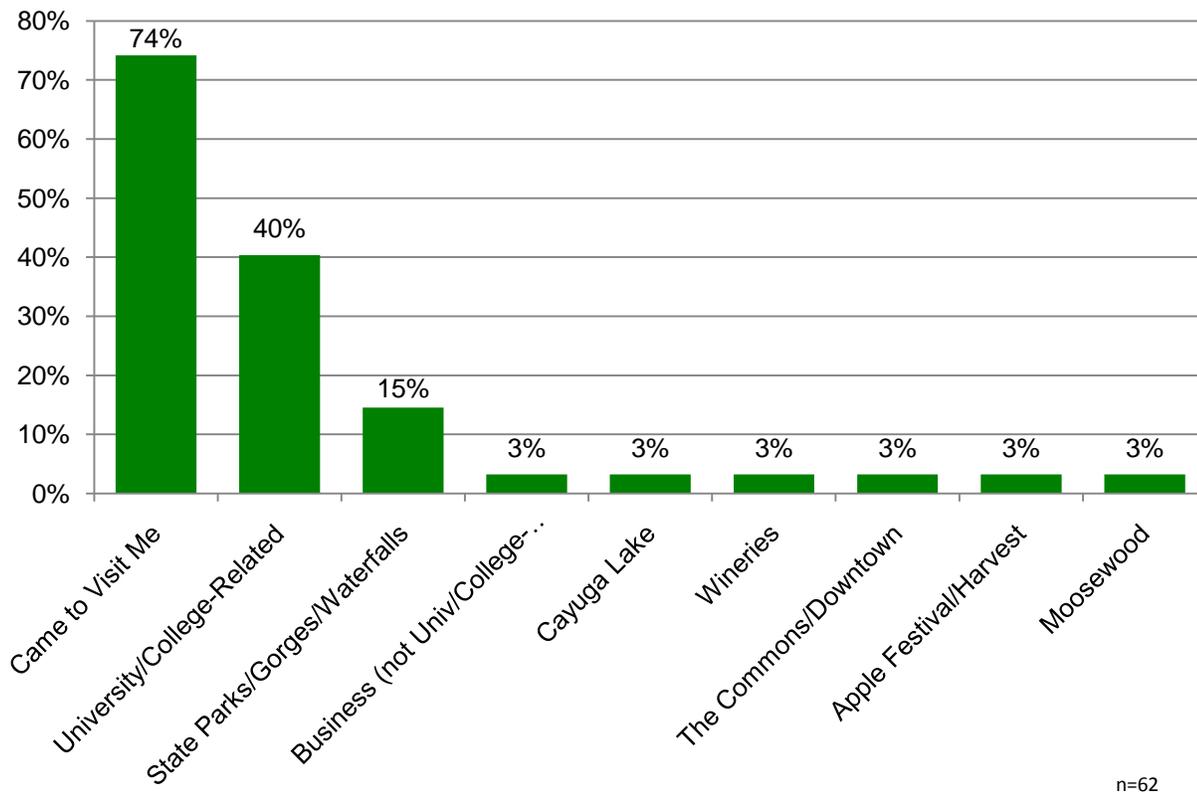
Collecting detailed information about the activities and motivation of individual visitors was deemed to be too burdensome to be asked of the student respondents, so this information was asked about in general regarding all guests in the preceding academic year. This information is used to roughly compare with the activities and motivations of other types of visitors in order to note and account for any large differences.

**Figure A.25: Activities of Student's Overnight Guests - Student Survey**



Respondents were asked to report what their overnight guests actually did or saw when they visited. Not all respondents provided answers for this and some respondents gave more than one answer. From the 62 respondents who provided information, university/college-related events or business was the leading activity cited by 73% of respondents. The next-most popular responses were the commons/downtown (68% of respondents), dining out (50%). All three of these top responses were given much more often than in the similar household survey. State parks/gorges/waterfalls was the next-most popular response, cited by 44% of the respondents, similar to the 47% rate of citation in the household survey. Note that a list of possible answers was not provided to the respondents, but rather the question was open-ended and the responses were classified by the interviewee or later in analysis. Also note that the above chart does not have the complete list of responses, but only those cited by 5% or more of respondents that provided this information.

**Figure A.26: Travel Motivation of Student's Overnight Guests - Student Survey**



Respondents were asked what motivated the visit of their overnight, out-of-town guests, regardless of what was actually done during the visit. More than one answer was allowed. Of the 62 respondents who answered this question, the leading visit motivations provided were ‘came to visit me’ (74% of respondents) and university/college-related events or business (40%). The next-most popular motivating factor was state parks/gorges/waterfalls (15%) with no other factor getting more than 3% of the responses.

## A.4. Visitors Bureau Survey

### A.4.1. Methodology

In order to collect additional information to supplement the intercept surveys, a survey was conducted at the two Visitor Information Centers operated by the Ithaca Visitor Bureau (IVB). This survey contained questions not in the intercept questionnaire such as regarding trip planning, website usage, and household type; the questionnaire also used alternative phrasing for the satisfaction and motivation questions.

This survey was non-scientific in that the sample was not controlled. Therefore, the results must be treated cautiously. Paper surveys were made available at the Tompkins County Visitor Information Centers at the East Shore and Downtown locations. Visitors Bureau staff collected the responses. A total of 205 responses were collected, and while some were in various stages of incompleteness—such as some not having the backside of the two-sided form filled out—all the responses are tabulated below. For a sample of this size, in so far that it is representative of a wider population, yields a sampling error of  $\pm 6.8\%$  with 95% confidence. Results presented

below that compare subgroups and are statistically significant with 95% or higher confidence will be marked with an asterisk.

Table A.38: Day of the Week Surveys Completed – IVB Survey	
Monday	10%
Tuesday	10%
Wednesday	18%
Thursday	17%
Friday	14%
Saturday	16%
Sunday	7%
Unspecified	9%
Total	100%
	n=205
Note: Numbers may not sum due to rounding.	

Table A.39: Month Surveys Completed – IVB Survey	
April	12%
May	3%
June	15%
July	23%
August	21%
September	11%
October	6%
November	2%
Unspecified	7%
Total	100%
	n=205

Surveys were completed Monday through Sunday from April through November 2009. Over half of the surveys were completed in the months from June to August. By location, 50% of the surveys were completed at the East Shore location, 16% downtown, and the remaining 34% were unspecified.

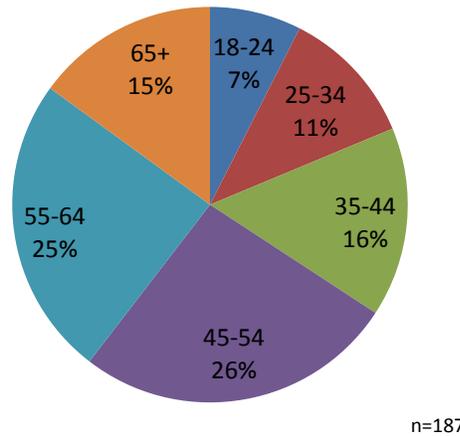
In the remainder of the tables and charts for the Visitors Bureau surveys, the ‘unspecified’ portions will be removed and only the other responses shown. Nevertheless, the size of the response will be noted according to the ‘n’ shown at the bottom of each table and chart.

### A.4.2. Demographics

Table A.40: Gender – IVB Survey	
Female	65%
Male	35%
Total	100%
	n=181

Females outnumbered males in the survey sample by nearly two to one (65% to 35%). Within the sample, females were more represented in the questionnaires completed from Monday to Thursday (69% females) compared to those filled out Friday through Sunday (56% females).

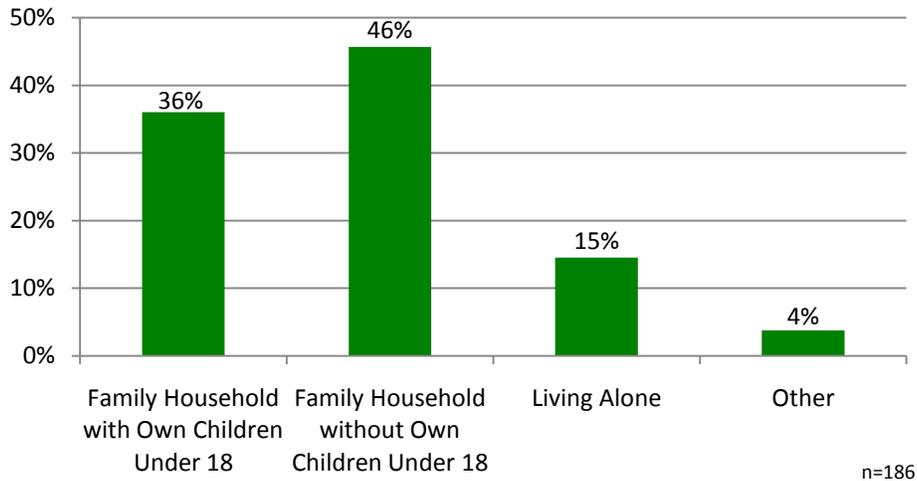
Figure A.26: Age - IVB Survey



By age, slightly over half (51%) of the respondents were in the 45 to 64 age range.

- The cohort age 18 to 34 made up a larger\* portion of the sample in July and August (25%) compared to the other months of surveying (11%).

Figure A.27: Household Type - IVB Survey



The largest household type in the sample was family households without own children under 18 which accounted for 46% of the specified responses. Family households with own children under 18 was the next-largest group at 36% followed by those living alone (15%) and other household types (4%).

- The family households without own children under 18 were predominantly older with 83% being 45 years or older.
- The family households with own children under 18 were predominantly in the middle ages of 35-54 which accounted for 77% of this group.
- Those respondents living alone included those both young and old, made up of 44% ages 34 and younger and 37% 55 and older.

- The other household type comprised seven responses, five of which were individuals age 65 or over.
- Households without own children under 18 composed a larger\* percentage of the sample from April through June (63%) compared to other months (37%).
- Households with own children under 18 and those living alone combined to account for a larger\* percentage of the sample from July to August (62%) compared to other months (40%).

Table A.41: Last Grade or Year of School Completed – IVB Survey	
Grade School or Some High School	3%
High School Diploma (Finished Grade 12)	12%
2-Year Degree	10%
4-Year Degree	35%
Graduate School (Master's or PhD)	36%
Other / Don't Know	4%
Total	100%
	n=187

A strong majority of visitors (71%) had 4-year degrees or higher with 36% of all the respondents having completed graduate school work.

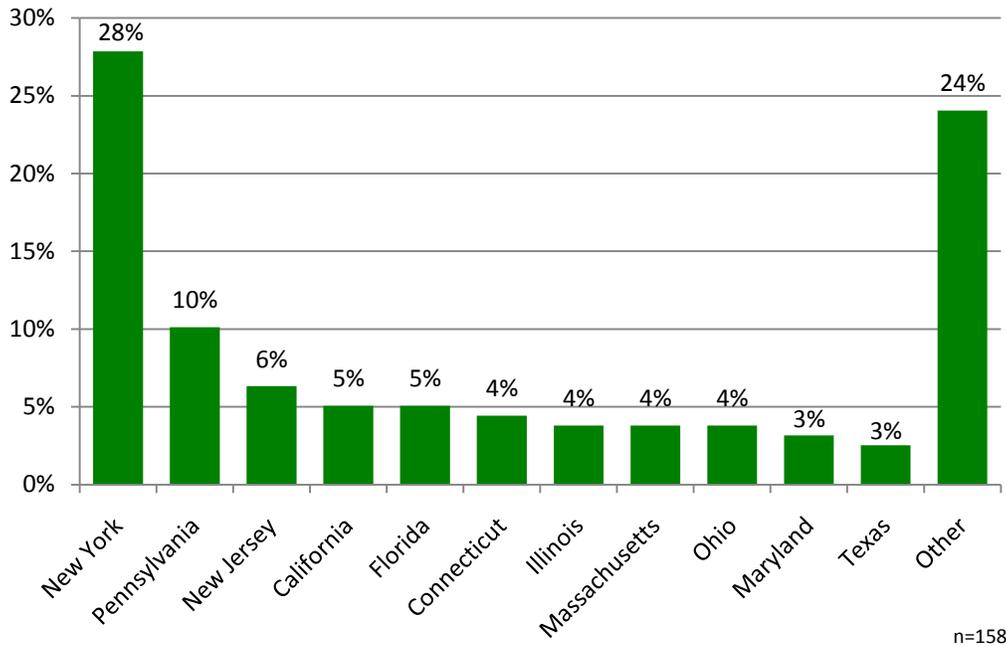
- Males were more likely\* to report themselves as having completed graduate school (47%) compared to female respondents (31%).
- Respondents from family households without own children under 18 were more likely\* to report having a 4-year degree or higher (81%) compared to the remainder of the responses (63%).

Table A.42: Country – IVB Survey	
United States	89%
Canada	6%
Australia	1%
China	1%
England	<1%
France	<1%
Germany	<1%
Indonesia	<1%
Israel	<1%
Netherlands	<1%
Total	100%
	n=184

About 89% of the respondents indicated the United States as the country they live in with 6% living in the Canada and the remainder in other foreign countries.

- Questionnaires completed Monday through Thursday had a higher percentage of foreign travelers (15%) compared to those completed Friday through Sunday (4%).

Figure A.28: State - IVB Survey



Responses by state (for those United States residents who provided zip code information) were led by New York (28%) followed by Pennsylvania (10%) and New Jersey (6%).

- New York state responses made up a higher\* proportion of surveys gathered Friday through Sunday (38%) than those filled out Monday through Thursday (20%), consistent with there being more local travelers on the weekends.

Table A.43: Metropolitan Statistical Area – IVB Survey	
New York	15%
Philadelphia	6%
Boston	3%
Poughkeepsie	3%
Rochester	3%
San Francisco	3%
Syracuse	3%
Washington DC	3%
Other Metropolitan Areas	46%
Rural Counties	15%
Total	100%
	n=158

By metropolitan area, the top two visitor originations were New York (15%) and Philadelphia (6%). No other metro area accounted for more than three percent of the survey sample. Fifteen percent of the visitor sample comprised

visitors from rural (non-metropolitan) areas. Nineteen of the twenty-one rural respondents who provided gender were female, a higher\* percentage than found in the overall sample.

**A.4.3. Visitation Purpose**

**Figure A.29: First-Time Visitors - IVB Survey**



n=205

First-time visitors made up a little more than half of the survey sample, accounting for 52% of the responses.

- Visitors in the spring months of April and May were more likely\* to be first-time visitors (70%) compared with the rest of the respondents (49%).
- Within the sample, foreign visitors had a higher percentage of first-time visitors (71%) compared to US residents (49%).

Table A.44: Primary Purpose of Visit – IVB Survey	
Leisure	76%
Business & Leisure	8%
Business	3%
Other/Don't Know/No Reply	12%
Total	100%
	n=205
Note: Numbers may not sum due to rounding.	

Over three-quarters (76%) of the survey respondents were leisure travelers only. Another 8% reported being in the county for both leisure and business. Among the 12% “other” responses, over half were in the county dropping off or picking up a university or college student or touring a university or college with a prospective student.



Table A.45: Reasons for Visiting the Ithaca Area – IVB Survey	
Visiting Family	20%
Visiting Friends	20%
Touring a University or College with a Prospective Student	12%
Attending an Event	12%
Dropping Off or Picking Up a Student at a University or College	8%
None of the Above	44%
Other/Don't Know/No Reply	3%
	n=205

One out of every five visitors (20%) completing surveys stated that a reason for the trip was visiting family. The same percentage reported a reason for the trip was to visit friends. Twelve percent said they were in town for touring a university or college with a prospective student and 8% said they were dropping off a student at a university or college. Twelve percent stated there were attending an event—multiple responses in this category included ‘wedding’ (3 responses), ‘Ithaca College orientation’ (2), ‘Grassroots Festival’ (2), and ‘Apple Festival’ (2). The vast majority of the ‘none of the above’ responses were from leisure visitors—in other words, including visitors simply on a vacation or passing through.

- Respondent visitors less than 35 years old were less likely\* to be visiting family (6%) compared to those 35 and over (24%). Furthermore, repeat visitors were more likely\* to be visiting family (31%) compared to first-time visitors (10%).
- Half of the travelers that were visiting family were also visiting friends during their Ithaca visit. Repeat visitors were more likely\* to be visiting friends (30%) compared to first-time visitors (10%).
- For the category dropping off or picking up a student at a university or college, the peak activity—as might be guessed—occurred in August and these respondents were primarily older adults (10 of 14 aged 45-54).
- University or college touring activity also peaked in August among the responses but was more spread throughout the year than dropping-off and picking-up activity.

**Table A.46: "What was the most important factor influencing your decision to visit the Ithaca area rather than somewhere else?" – IVB Survey**

	n
Cornell/Ithaca College	40
Natural Beauty/Scenery	32
Waterfalls/Gorges	28
Cayuga Lake/Fingerlakes	22
Family	15
Outdoor Activities	10
Wineries	10
Friends	8
Proximity/Location	8
Culture	5
Parks	5
Recommendations	5

Respondents were asked for the most important factor influencing their decision to visit the Ithaca area. The outdoor attractions of the county were mentioned, in aggregate, most frequently with responses specifically mentioning the natural beauty or scenery (32 responses), the waterfalls or gorges (28), Cayuga Lake or the Fingerlakes (22), outdoor activities such as hiking or camping (10), as well as the parks (5). A motivating factor having something to do with Cornell University or Ithaca College was mentioned 40 times, the most of any single response category shown here—these responses included attending a conference at one of the schools, having a relative attending one of the schools, or mention of the school without further clarification. Other motivating factors included family (15) and friends (8), wineries (10), proximity or location (8), culture (5), and recommendations (5).

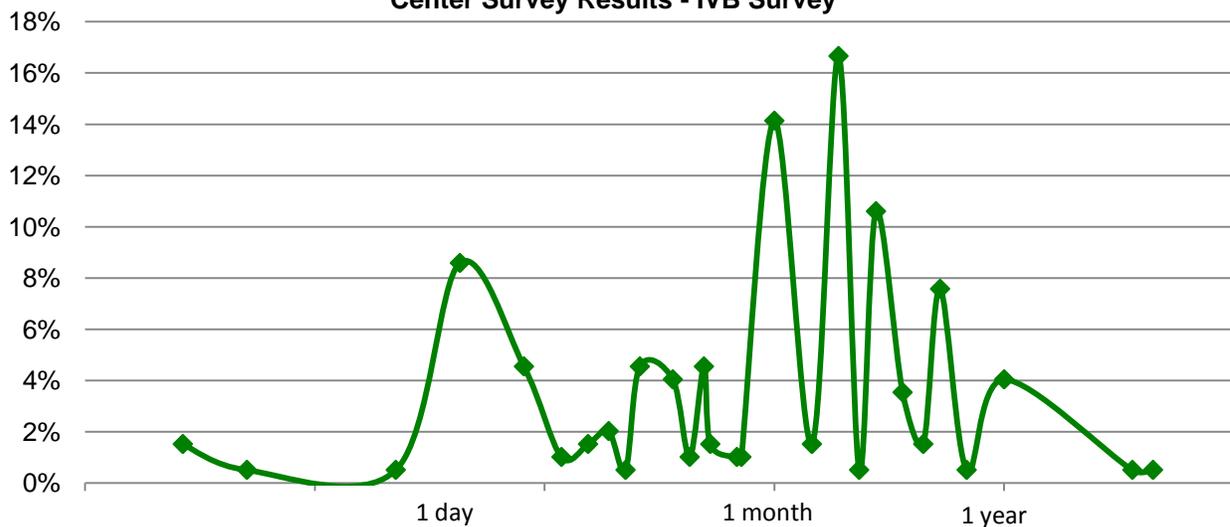
**Table A.47: "What secondary factor or factors were important in your decision to visit the Ithaca area?" – IVB Survey**

	n
Proximity/Location	19
Cornell/Ithaca College	16
Natural Beauty/Scenery	15
Waterfalls/Gorges	13
Dining/Food	11
Wineries	10
Recommendations	9
Cayuga Lake/Fingerlakes	7
Outdoor Activities	6
Shopping	6
Culture	5
Parks	5

For secondary factors influencing the decision to visit the Ithaca area, the popular primary motivating factors were popular here as well—outdoor attractions and the postsecondary schools. Proximity or location was the most frequent response here (19 responses) and included responses such as “close to home” or “was in the area.” Dining or food was mentioned 11 times with some respondents singling out an establishment such as the Moosewood or mentioning food and restaurants in general. Nine respondents reported a recommendation as a secondary motivating factor and included responses such as “reputation as a great vacation spot,” “good personal reviews,” and “heard from friends how beautiful it is.”

### A.4.4. Trip Planning

**Figure A.30: Advance Time for Decision to Take the Ithaca Trip - Visitor Center Survey Results - IVB Survey**



Respondents were asked how far in advance they decided to take their trip into Ithaca. Answers varied from instantaneously to five years. The median planning time was one month, meaning half of the respondents planned one month or less while the other half planned for one month or more. Most frequently mentioned planning times were two months (17%), one month (14%), three months (11%), one day (9%), and six months (8%).

Table A.48: How Far in Advance the Trip Was Planned – Visitor Center Survey Results – IVB Survey	
One Day or Less	11%
Two to Seven Days	14%
Eight to Twenty-Nine Days	13%
One Month	14%
About Two Months	18%
About Three Months	11%
Four to Six Months	13%
Seven to Twelve Months	5%
More than a Year	1%
Total	100%
	n=198

In aggregate, one-quarter (25%) of the respondents decided in advance to take the trip in seven days or less before the trip. Another 13% 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 beginning four months to a year out and the remaining 1% made the decision to travel more than a year before the actual trip.

- Within the sample, trips in the autumn months (September through November) were more often planned in under a month (50%) compared to the spring and summer months (35%).

<b>Table A.49: Information Sources Used for Trip Planning – IVB Survey</b>	
Internet	77%
Friends or Family	41%
AAA	16%
Newspaper or Magazine	5%
Prior Knowledge	4%
Travel Guide/Brochure	4%
Visitors Bureau	3%
Travel Agent	1%
Maps	1%
Other	3%
Don't Know / None / No Reply	6%
	n=205

The internet was used for trip planning by 77% of the respondents. The next-most used planning resource was friends or family (41%) followed by the American Automobile Association (AAA, 16%). Other resources included newspapers or magazines (5%), prior knowledge (4%), travel guides or brochures (4%), and the Visitors Bureau (3%).

- The internet was used for trip planning by a clear majority of respondents in every age cohort except the group 65 years and over where it was used by exactly half of respondents.
- Among US resident respondents, those living in metropolitan areas were more likely\* (79%) to use the internet for planning their trip compared to those living in rural areas (52%).
- As would be expected, friends or family were used as a trip planning resource more frequently\* among travelers who reported they were visiting friends or family during their trip. Travelers visiting family or friends were also less likely\* to use the internet for planning.
- AAA was used more often\* by respondents with a graduate school degree (24%) compared to the other respondents (12%).

Table A.50: Websites Visited by Those Using the Internet to Plan Their Trip – IVB Survey	
VisitIthaca.com	52%
Cornell.edu	17%
Ithaca.edu	13%
Wikipedia.org	10%
Google/Google Earth	8%
ci.Ithaca.ny.us	4%
Hotel/Booking Sites	4%
	n=157

Among those Ithaca visitors that used the internet to plan their trip, VisitIthaca.com was used by more than half (52%). The next-most-used sites were the university and college sites, Cornell.edu (17%) and Ithaca.edu (13%). Following those, Wikipedia.org was used by 10% of those using the internet for trip planning and Google or Google earth was used by 8%. Four percent used internet sites of individual hotels or general booking sites such as Orbitz, Priceline, etc.<sup>74</sup> Other sites were also reported as being used, but none more than once—and in some cases the respondents stated that they did not remember which sites.

- Within the sample, VisitIthaca.com was used slightly more often by first-time visitors to Ithaca. Fifty-five percent of first-time visitors who used the internet for planning visited the site compared to 49% of repeat visitors.
- Respondents with a graduate degree that used the internet for trip planning went to the VisitIthaca.com site more often<sup>75</sup> (63%) than other respondents that used the internet (46%).

#### A.4.5. Trip Characteristics

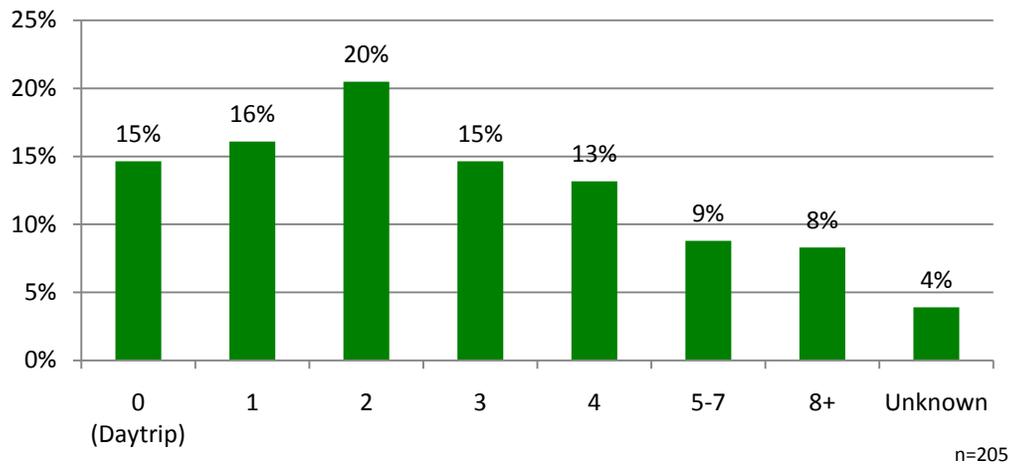
Table A.51: Means of Travel to the Ithaca Area – IVB Survey	
Automobile	84%
Air	7%
Air and Automobile	6%
Other	2%
Bus	1%
Total	100%
	n=204

Eighty-four percent of respondents traveled to the Ithaca area by automobile. Seven percent traveled by air while another 6% traveled by both air and auto. Just 1% came to the area by bus.

<sup>74</sup> No specific booking site was listed more than once.

<sup>75</sup> This result was statistically significant with 90% confidence, though not 95% (which would have elicited an asterisk notation).

**Figure A.31: Length of Stay in the Ithaca Area in Number of Nights - IVB Survey**



Of the survey respondents, 15% were on a day trip and did not spend a night in the Ithaca area. Among the remainder, 16% spent one night in the area, 20% spent two nights, 28% stayed three to four nights, and 17% spent five or more nights in the area. The median average stay was two nights, meaning half stayed two nights or less and half stayed two nights or more. The mean average stay was 3.53 nights—an average boosted by four stays of 20 or more nights and another stay of 50 nights.

- Nearly all of the stays of eight or more days were reported by respondents taking the survey during the summer months (June through August).
- Of the 26 day trips taken by known US residents, half (13) were taken by travelers that did not live in New York or Pennsylvania. In other words, these were likely day trips not originating from the travelers' homes, but from locations outside the Ithaca area.
- Travelers visiting family were more likely\* to stay three or more nights (63%) than travelers who were not visiting family (42%).
- Within the sample, the length of stay was directly correlated with the average advance time the decision was made to travel to Ithaca. Among day trippers, 66% made the decision to travel less than a month in advance while the percentage dropped to half among travelers staying one or two nights. Among travelers spending three to seven nights, 54% planned in advance for one to three months while another 25% planned for four months or more. Among travelers spending eight or more nights, 35% planned in advance for four months or more.

<b>Table A.52: Place of Lodging – IVB Survey</b>	
Hotel, Motel, or Resort	45%
Family or Friend's Place	20%
Campground	12%
B&B or Inn	12%
Dorm Room	2%
Other	9%
Total	100%
	n=145

Of those lodging in the Ithaca area, close to half (45%) reported staying at a hotel, motel, or resort. One of five travelers (20%) stayed with family or friends. Twelve percent stayed at a campground while another twelve percent stayed at a bed and breakfast or an inn. Over half of the “other” responses were from traveling parties that lodged in more than one location. Fifty-six of the respondents staying in a hotel, motel, or resort provided the name of the establishment; the most-reported locations were the Comfort Inn (10), Country Inn (5), Ramada (5), Best Western (4), and Holiday Inn (4), and Marriott Courtyard (4).

#### A.4.6. Satisfaction

In an open-ended question, respondents were asked to describe what was most memorable about their experience. Of the 181 replies, 35% marked the questionnaire check box “I arrived to the Ithaca area too recently to reply.” Thirty-nine percent referenced the scenic beauty, nature, or related outdoor activities as being most memorable part of their experience. A dozen responses somehow were connected with a university or college such as visiting a campus or dropping off a child for school. The complete responses follow below.

Table A.53: "What has been most memorable about your experience?" – IVB Survey	
	n
The falls	4
Waterfalls	4
Gorges	3
Scenery	3
Beautiful scenery	2
Friendly people	2
Friendly staff at visitors center	2
Hiking	2
Natural beauty	2
The lake	2
Always, the beauty of the area, friendliness of people, interesting shops and of course visiting my family	1
Amazing experiences	1
Apple festival	1
As always a great time	1
Being with the love of my life and sites	1
Bell tower	1
Cayuga Lake	1
Children's Garden	1
Colors	1
Coming to the visitors center to learn about all the places in Ithaca	1
Commons; Plantation	1
Cornell	1
Cornell and Visitor Center	1
Cornell campus	1
Cornell University and walking across the suspension bridge	1
Dropping daughter off at Ithaca College for orientation	1
Everything	1
Excellent dinner at Maxies	1
Falls and gorges, forests and Ithaca commons	1
Falls in summer	1
Falls; scenery; memories	1

Fantastic visitor center	1
Farmers market	1
Friendly people; easy to get around	1
Friends; boating; area; shopping	1
Gorge trail runs	1
Gorges; downtown Ithaca	1
High school graduation	1
Hike in upper buttermilk falls park	1
Hiking the trails	1
Ithaca College; learning about Wharton Bros Studios	1
Ithaca falls, etc	1
Lying outside at Wagner w/a cold glass of Alta B wine, sun w/perfectly warm breeze	1
Malls; downtown; college atmosphere	1
Montezuma waterfalls	1
Move in of daughter (Ithaca College)	1
Music; Cayuga Lake	1
Natural features	1
Outdoor recreation: plantations, Stewart Park, Buttermilk Falls	1
Party on the lake	1
Poor signage; very friendly, helpful people	1
Quaint tours and shops	1
Restaurants	1
Robert Treman	1
Robert Treman Park	1
Sapsucker swamp	1
Scenery	1
Scenery so far	1
Scenery; earth preservation	1
Scenic beauty	1
Seeing family & friends; seeing waterfalls; farmers market; woods-hiking, wildlife; hiking at Freeman	1
Seeing great friends	1
Shops	1
Students	1
Swimming in a spring	1
Swimming in the waterfalls	1
Taughannock falls	1
The beautiful landscape	1
The beautiful scenery	1
The beauty of it all	1
The beauty of the area	1
The gorges	1
The great opportunities to see such beauty	1
The greenery; the tourist facilities	1
The inn; restaurant choices; scenery; Ithaca Bakery; Cornell Campus	1
The lakes and scenery	1
The rain	1
The rain; very nice campground and parks	1
The scenery	1
The thunder & lightning	1
The views	1



The waterfalls	1
The waterfalls and lakes	1
Touring the Ithaca College campus	1
Treman State Park	1
Views	1
Visiting campus; Six Mile Creek; D.P. Dough	1
Visiting Cornell	1
Visitors Center	1
Walking the trails	1
Watkins Glen	1
Watkins Glen; Gorge	1
We love the gorges and hiking; I like downtown	1
Weather and news	1
Wine	1
Worms	1

Respondents were also asked in an open-ended question what can be improved to make the Ithaca area a more enjoyable vacation destination. Of the 163 responses, 54% said they arrived too recently to reply, 14% checked “don’t know / no reply.” Among the written responses, about 10% stated basically that nothing could be improved, e.g. “already perfect.” The most common suggestion or complaint referred to auto travel in some way or another: congested roads, construction, parking, or signage. The complete responses follow below.

Table A.54: "What can be improved to make the Ithaca area a more enjoyable vacation destination?" – IVB Survey	
	n
Nothing	8
A ferry to cross the lakes	1
Already perfect	1
Beautiful scenery, friendly people-what more could one ask for?	1
Better sense of areas of activity (i.e. shops, restaurants, etc.)	1
Better signs	1
Can't think of anything	1
Clean up Stewart Park to prior glory and do more to promote its silent filming history; I was dismayed by the state of these beautiful buildings	1
Current downtown construction	1
Easier information	1
Easier to get around without a car!	1
Easier traffic patterns	1
Events section of visit Ithaca website not updated	1
Excellent	1
Free parking	1
If we didn't have the waterfall book we bought elsewhere, we would have known a lot less about all the places to go	1
It is perfect	1
It's good like it is	1
Less cell phone calls on the street and parks	1
Less congestion and traffic downtown	1
Less detours	1
Less traffic congestion	1

Less traffic delays at intersection 89 & 96; less road construction	1
More cell towers	1
More indoor winter activities	1
More live music downtown	1
More marketing to out-of-state potential visitors; and unique renovated B&B's and inns to house them	1
More sunshine; no rain; less construction	1
More tour agencies	1
N/A	1
Not sure	1
Nothing, it has been wonderful	1
Parking spaces, but other than that, lovely	1
Please clear your road signs of branches	1
Right on red; better directions to lake, etc	1
Roads	1
Stores open later	1
Taughannock farms lunches	1
Tourist shop; more postcards showing Ithaca; bus stop; area (city) map with all the streets	1
Traffic	1
Traffic decrease	1
Trim the foliage around the visitors center sign (hard to see)	1
Unknown	1
Visitor info near commons	1
Weather, but it seems impossible to stop raining	1



## A.5: Survey Instruments

### A.5.1: Intercept Survey Instrument

<b>SCREENER</b>
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1. Are you a visitor to the Ithaca area<sup>76</sup> or do you live, work, or attend school in Tompkins County?  
**IF NOT A VISITOR, THANK & TERMINATE**
2. **(SKIP IF OBVIOUS)** We are only supposed to interview people 18 years or older. Are you 18 or older?  
**IF NO, THANK & TERMINATE**
3. Will you be ending your visit to the Ithaca area today or tomorrow?  
  
01 Today  
02 Tomorrow  
No/Other → **THANK & TERMINATE**

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<sup>76</sup> The "Ithaca area" is defined as Tompkins County.



**MAIN QUESTIONNAIRE**

4. Is this your first visit to the Ithaca area?

- 01 Yes → **SKIP TO Q6**
- 02 No
- 99 DK/REF → **SKIP TO Q6**

**IF VISITED ITHACA BEFORE (01 IN Q4), ASK:**

5. Including this trip, how many times have you visited the Ithaca area in the past 5 years?

\_\_\_\_\_

99 DK/REF

6. Was the primary purpose of your visit to the Ithaca area business, leisure, or both?

- 01 Business only → **ASK 6a (AND 6a1 IF APPROPRIATE), THEN SKIP TO Q8**
- 02 Leisure only → **ASK 6a AND 6a1/2, THEN CONTINUE WITH Q7**
- 03 Both → **ASK 6a AND 6a1/2, THEN CONTINUE WITH Q7**
- 99 DK/REF → **ASK 6a (AND 6a1 IF APPROPRIATE), THEN SKIP TO Q8**

**ASK EVERYONE:**

6a. And was the visit connected in any way with Cornell University or Ithaca College?

01 Yes → 6a1. In what way was it connected with Cornell University or Ithaca College?  
**(DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)**

- 01 Visiting family/friend who attends or works there
- 02 Dropping off/picking up student
- 03 Touring with a prospective student
- 04 Attending an event (specify): \_\_\_\_\_
- 05 Attending a conference
- 06 Attending a summer camp
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

02 No → 6a2. **[ONLY ASK IF VISITING FOR LEISURE/BOTH PURPOSES]**  
 What was the purpose of your visit?  
**(DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)**

- 01 Visiting family/friends
- 02 Attending an event (specify): \_\_\_\_\_
- 03 General vacation
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

99 DK/REF

**IF VISITING FOR LEISURE/BOTH PURPOSES (02-03 IN Q6), ASK:**

7. How important were each of the following in helping you decide to visit the Ithaca area this time? Please use a 5-point scale where 1 is "not at all important" and 5 is "very important." **(ROTATE STARTING POINT & DIRECTION)**

Attributes	Not at all important					Very important	DK/REF
	01	02	03	04	05		
a) Gorges & State Parks	01	02	03	04	05	99	
b) Wineries	01	02	03	04	05	99	
c) Cayuga Lake	01	02	03	04	05	99	
d) Downtown Ithaca, including The Commons	01	02	03	04	05	99	
e) Discovery Trail & Museums	01	02	03	04	05	99	
f) Arts, Music, & Theatre	01	02	03	04	05	99	
g) Dining & Restaurants	01	02	03	04	05	99	
h) B&Bs, Inns, & Resorts	01	02	03	04	05	99	

**ASK EVERYONE:**

8. What information sources did you use to research the Ithaca area for this trip? **(DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)**

01 Internet

02 Friends or Family

03 Travel Agent

04 AAA

05 Newspaper or Magazine

96 Other (specify): \_\_\_\_\_

97 None

99 DK/REF

9. How did you travel to the Ithaca area? **(DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)**

01 Automobile

02 Air

03 Bus

96 Other (specify): \_\_\_\_\_

99 DK/REF

10. What attractions or places did or will you visit while in the Ithaca area on this trip? (DO **NOT** READ LIST; ACCEPT MORE THAN ONE ANSWER. IF THEY MENTION ANYTHING OUTSIDE THE COUNTY, E.G. CORNING MUSEUM, RECORD. AUTOMATICALLY INCLUDE DESTINATION WHERE SURVEYED, EVEN IF NOT SPECIFICALLY MENTIONED.)

- 01 State parks/waterfalls/gorges
- 02 Downtown Ithaca/The Commons
- 03 Wineries
- 04 Cayuga Lake
- 05 Cayuga Nature Center
- 06 Cornell
- 07 DeWitt Mall
- 08 Farmers Market
- 09 History Center
- 10 Ithaca College
- 11 Johnson Art Museum
- 12 Lab of Ornithology
- 13 Moosewood Restaurant
- 14 Museum of the Earth
- 15 Plantations
- 16 Sciencenter
- 17 State Theatre
- 96 Other (specify): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

99 DK/REF

11. Including yourself, how many adults (age 18+) are in your traveling party, that is, the group with whom you share expenses?

\_\_\_\_\_ adults

99 DK/REF

12. How many children (under age 18) are in your traveling party? (**ONLY INCLUDE CHILDREN WHOSE EXPENSES ARE BEING SHARED WITH THE ADULT INTERVIEWEE**)

\_\_\_\_\_ children

99 DK/REF

13. By the time you leave, how many days will you have spent in the Ithaca area?<sup>77</sup>

\_\_\_\_\_ days

99 DK/REF

14. What is the length of your stay in # of nights in the Ithaca area?

\_\_\_\_\_ nights → IF 0 OR DK/REF, SKIP TO Q17

99 DK/REF

<sup>77</sup> If a travel party is split over time periods, only consider and record answers for the portion of the party the interviewee uniquely belongs to. For example, if you are interviewing a father who is vacationing with his wife for five days and then the couple is joined by their child for two more days, record answers for a traveling party of 2 over 7 days.

**IF SPENDING THE NIGHT IN ITHACA AREA (1-98 IN Q14), ASK:**

15. Where did you [meaning: you & your party] overnight in the Ithaca area? What is the name of the establishment? **(DO NOT READ LIST UNLESS NECESSARY FOR CLARIFICATION; ACCEPT MORE THAN ONE ANSWER)**

- 01 Hotel/Motel/Resort (specify): \_\_\_\_\_
- 02 B&B/Inn<sup>78</sup> (specify): \_\_\_\_\_
- 03 Family or Friends' Place
- 04 Campground
- 05 Dorm Room
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

16. For your entire Ithaca visit, how much did your party spend on lodging? **(ROUND TO NEAREST DOLLAR. INCLUDE ALL COSTS ASSOCIATED WITH THE ROOM – E.G., ROOM, TAXES, INCIDENTALS, ETC. DO NOT INCLUDE MEALS CHARGED TO THE ROOM.)**

- 01 Total \$ \_\_\_\_\_ OR 02 Per Night \$ \_\_\_\_\_
- 99 DK/REF

\*\*\*\*\*SKIP TO Q21\*\*\*\*\*

**IF DAYTRIP (0 IN Q14), ASK:**

17. Is this daytrip into the Ithaca area from your home or are you lodging away from home?

- 01 From home → **SKIP TO Q21**
- 02 Lodging away from home
- 03 DK/REF → **SKIP TO Q21**

**IF LODGING AWAY FROM HOME (2 IN Q17), ASK:**

18. In what city are you lodging? **(IF THEY ANSWER A LOCATION IN TOMPKINS COUNTY, POINT OUT THAT WE CONSIDER THAT TO BE THE "ITHACA AREA" AND GO BACK TO Q14)**

\_\_\_\_\_  
99 DK/REF

19. What type of lodging is it? **(DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)**

- 01 Hotel/Motel/Resort
- 02 B&B/Inn
- 03 Family or Friends' Place
- 04 Campground
- 05 Dorm Room
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

<sup>78</sup> There are 5 "Inns" in Tompkins: Benn Conger, Edgewood Guest House, Rogue's Harbor, Taughannock Farms, and William Henry Miller. Many hotels/motels have "Inn" in the name (e.g. Holiday Inn), but are not classified as "Inns."

20. Why did you NOT choose to stay in the Ithaca area? (**DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER**)

- 01 Everything was booked
- 02 I had free lodging available elsewhere
- 03 Cost (Ithaca was too expensive or other lodging was more economical)
- 04 The lodging was closer to other destinations that were part of my trip
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

**ASK EVERYONE:**

21. By the time you leave, how much will you have spent on average per day in the Ithaca area [**I.E., TOMPKINS COUNTY: SHOW MAP IF NECESSARY**] for your entire party for...? (**ROUND TO NEAREST DOLLAR, USE 9999 FOR DK/REF**)

- a) Food & Drink \$ \_\_\_\_\_
- b) Local Transportation (e.g. car rental, taxi, gas) \$ \_\_\_\_\_

22. By the time you leave, how much will you have spent in total for the entire trip in the Ithaca area [**I.E., TOMPKINS COUNTY: SHOW MAP IF NECESSARY**], including spending by your travel party for...? (**ROUND TO THE NEAREST DOLLAR, USE 9999 FOR DK/REF**)

- a) Shopping<sup>79</sup> (gifts, clothing, personal items) \$ \_\_\_\_\_
- b) Entertainment and Attractions (shows, museums, etc) \$ \_\_\_\_\_
- c) Other \$ \_\_\_\_\_

23. Is your trip to the Ithaca area part of a larger trip?

- 01 Yes
- 02 No → **SKIP TO Q25**
- 99 DK/REF → **SKIP TO Q25**

**IF PART OF A LARGER TRIP (01 IN Q23), ASK:**

24. In the order that you visited or plan to visit them, what cities or towns are on your schedule? (**RECORD CITY/STATE, CONFIRM SPELLING IF NECESSARY**)

- 01 \_\_\_\_\_
- 02 \_\_\_\_\_
- 03 \_\_\_\_\_
- 04 \_\_\_\_\_
- 05 \_\_\_\_\_
- 06 \_\_\_\_\_
- 07 \_\_\_\_\_
- 08 \_\_\_\_\_
- 09 \_\_\_\_\_
- 10 \_\_\_\_\_
- 99 DK/REF

<sup>79</sup> Do NOT count in this category purchase of school supplies for students attending a Tompkins County college. Books and notebooks bought for a registered university or college student ARE school supplies, a sweatshirt bought for a prospective student is NOT school supplies.

25. Overall, how satisfied were you with your trip to Ithaca? Would you say...?

- 01 Very Satisfied,
- 02 Somewhat Satisfied,
- 03 Somewhat Dissatisfied, or
- 04 Very Dissatisfied
- 99 (DO NOT READ) DK/REF

26. What aspects of Ithaca did you most enjoy? (DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)

- 01 Natural scenery
- 02 State parks/waterfalls/gorges
- 03 Downtown
- 04 Wineries
- 05 Cayuga Lake
- 96 Other (specify):

- 97 None
- 99 DK/REF

27. What aspects of Ithaca did you not enjoy? (DO NOT READ LIST; ACCEPT MORE THAN ONE ANSWER)

- 01 Crowds
- 02 Accommodations
- 03 Weather
- 96 Other (specify):

- 97 None
- 99 DK/REF

28. How likely will you be to return to the Ithaca area in the next 5 years for a leisure-oriented trip? Would you say...?

- 01 Definitely,
- 02 Probably,
- 03 Might/might not,
- 04 Probably will not, or
- 05 Definitely will not
- 99 (DO NOT READ) DK/REF

29. What country do you live in? (DO NOT READ LIST, ACCEPT ONLY ONE RESPONSE)

- 01 USA → What is your zip code? \_\_\_\_\_ 99999 DK/REF
- 02 Canada → What province? \_\_\_\_\_ 99 DK/REF
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF



30. What was the last grade or year of school that you completed?<sup>80</sup> **(DO NOT READ LIST)**

- 01 Grade School or Some High School
- 02 High School Diploma (Finished Grade 12)
- 03 2-Year Degree
- 04 4-Year Degree
- 05 Graduate School (Master's or PhD)
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

31. **[ETHNICITY BY OBSERVATION; IF UNSURE, ASK.]** Most people think of themselves as belonging to a particular ethnic or racial group. What ethnic or racial group are you a member of? **(READ LIST IF NECESSARY; ACCEPT MORE THAN ONE ANSWER)**

- 01 White
- 02 Black or African American
- 03 Asian or Asian American
- 04 Hispanic/Latino
- 96 Other (specify): \_\_\_\_\_
- 99 DK/REF

32. Which category does your age fall into? **(SHOW CARD<sup>81</sup>)**

- 01 A) 18-24
- 02 B) 25-34
- 03 C) 35-44
- 04 D) 45-54
- 05 E) 55-64
- 06 F) 65+
- 99 DK/REF

33. Which of these categories includes your total household income before taxes last year? **(SHOW CARD)**

Include your own income plus all members of your household living with you.

- 01 A) Less than \$20,000
- 02 B) \$20,000 - 29,999
- 03 C) \$30,000 - 39,999
- 04 D) \$40,000 - 49,999
- 05 E) \$50,000 - 59,999
- 06 F) \$60,000 - 69,999
- 07 G) \$70,000 - 79,999
- 08 H) \$80,000 - 89,999
- 09 I) \$90,000 - 99,999
- 10 J) \$100,000 - \$149,999
- 11 K) \$150,000
- 99 DK/REF

<sup>80</sup> Some college but no degree = "High School Diploma"; Some graduate school but no graduate degree = "4-year degree."

<sup>81</sup> The categories for age and income will be labeled with capital letters so the respondent can indicate an answer via the letter (to lessen hesitancy to respond).

Those are all the questions I have. Thank you very much for your participation!

**RECORDED BY INTERVIEWER**

**34. GENDER:**

- 01 Female
- 02 Male

**35. WHEN SURVEY WAS COMPLETED:**

a) Time of day of survey: \_\_\_ : \_\_\_ 01 AM 02 PM

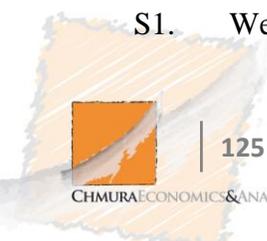
b1) Month	b2) Date			c) Day of Week
01 January	01	11	21	01 Monday
02 February	02	12	22	02 Tuesday
03 March	03	13	23	03 Wednesday
04 April	04	14	24	04 Thursday
05 May	05	15	25	05 Friday
06 June	06	16	26	06 Saturday
07 July	07	17	27	07 Sunday
08 August	08	18	28	
09 September	09	19	29	
10 October	10	20	30	
11 November			31	
12 December				

**36. PLACE OF SURVEY:**

- 01 Taughannock State Park
- 02 Buttermilk State Park
- 03 Allan Treman Marina
- 04 Robert Treman State Park
- 05 Airport
- 06 Art Museum
- 07 Bus Station
- 08 Commons
- 09 Dewitt Mall
- 10 Farmers Market
- 11 Moosewood
- 12 Museum of Earth
- 13 Plantations
- 14 Cornell University
- 15 Ithaca College
- 16 Hotel or other lodging (specify name of establishment): \_\_\_\_\_
- 96 Other (specify): \_\_\_\_\_

**A.5.2 Household Survey Instrument**

S1. We are only supposed to interview people 18 years or older. Are you 18 years or older?



- 01 Yes
- 02 No → **ASK TO SPEAK TO ADULT HEAD OF HOUSEHOLD, REPEAT INTRODUCTION THANK & TERMINATE**
- 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**

S2. Are you currently a resident of Tompkins County?

- 01 Yes
- 02 No → **THANK & TERMINATE**
- 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**

**Main Questionnaire**

1. In the 2008 calendar year, did you have any out-of-town visitors STAY OVERNIGHT at your place of residence in Tompkins County?

**INTERVIEWER NOTES:**

- "Out-of-town visitors" are people who do not live, work, or go to school in Tompkins County.
- If residence is a B&B, exclude all paying customers and only include complimentary visits from family and friends.

- 01 Yes
- 02 No → **SKIP TO Q4**
- 99 **DO NOT READ:** Don't Know/Refused → **SKIP TO Q4**

**IF HAD OVERNIGHT VISITORS (01 IN Q1), ASK:**

2. Please estimate FOR EACH VISIT, the month, number of visitors (adults and children), and length of stay (in nights):

**INTERVIEWER NOTE:**

- Try to get month for each visit, record season if unable to identify specific month of visit
- If visitors in one group stayed for different numbers of nights, divide into multiple groups/visits

Visit	a. Month/Season	b. Number of Visitors (adults and children)	c. Length of Stay (in nights)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

**2a response options:**

- 01 Month → **GO TO 2a1 RESPONSE OPTIONS**  
 02 Season → **GO TO 2a2 RESPONSE OPTIONS**  
 99 **DO NOT READ:** Don't Know/Refused

**A.5.3. Student Survey Instrument**

1. We are only supposed to interview people 18 years or older. Are you 18 years or older?
 

01 Yes  
 02 No → **THANK & TERMINATE**  
 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**
2. Are you currently a student of...? (**READ LIST. ACCEPT ONE RESPONSE ONLY.**)
 

01 Cornell University  
 02 Ithaca College, or  
 03 TC3  
 97 **DO NOT READ:** None of these/Not a student → **THANK & TERMINATE**  
 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**
3. In the last academic year (June 2008 – May 2009), which semesters did you attend [INSERT COLLEGE FROM Q2]? (**READ LIST. ACCEPT MULTIPLE RESPONSES.**)
 

01 Currently attending – Spring Semester 2009  
 02 Fall Semester 2008  
 03 Summer Semester 2008  
 97 **DO NOT READ:** None of the above → **THANK & TERMINATE**  
 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**
4. Do you currently reside...?
 

01 In a dorm, apartment, or house on campus → **CONTINUE**  
 02 In a dorm, apartment, or house off campus → **SHOW TOMPKINS COUNTY MAP TO VERIFY THEY RESIDE WITHIN COUNTY (IF NOT, CODE 05)**  
 03 With a relative who is a permanent resident of Ithaca or Tompkins County → **THANK & TERMINATE**  
 04 At your own permanent residence in Tompkins County, or → **CONTINUE**  
 05 Outside Tompkins County → **THANK & TERMINATE**  
 99 **DO NOT READ:** Don't know/Refused → **THANK & TERMINATE**

**Main Questionnaire**

5. In the last academic year (June 2008 – May 2009), did you have any out-of-town visitors STAY OVERNIGHT at your place of residence in Tompkins County?

**INTERVIEWER NOTES:**

- "Out-of-town visitors" are people who do not live, work, or go to school in Tompkins County.



- 01 Yes
- 02 No → **SKIP TO Q8**
- 99 **DO NOT READ:** Don't Know/Refused → **SKIP TO Q8**

**IF HAD OVERNIGHT VISITORS, ASK:**

6. Please estimate FOR EACH VISIT, the month, number of visitors (adults and children), and length of stay (in nights):

**INTERVIEWER NOTE:**

- Try to get month for each visit, record season if unable to identify specific month of visit
- If visitors in one group stayed for different numbers of nights, divide into multiple groups/visits

Visit	a1. Month/Season	a2. Specific Month/Season	b. Number of Visitors (adults and children)	c. Length of Stay (in nights)
1	01 Month 02 Season			
2	01 Month 02 Season			
3	01 Month 02 Season			
4	01 Month 02 Season			
5	01 Month 02 Season			
6	01 Month 02 Season			
7	01 Month 02 Season			
8	01 Month 02 Season			
9	01 Month 02 Season			
10	01 Month 02 Season			
11	01 Month 02 Season			
12	01 Month 02 Season			

**6a2.1 (month) response options:**

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**6a2.2 (season) response options:**

- 01 Winter
- 02 Spring
- 03 Summer
- 04 Fall

7a. What are ALL the attractions or events that your overnight guests actually saw or did when they visited you in the past year? (**DO NOT READ LIST. ACCEPT MORE THAN ONE ANSWER. PROBE AND CLARIFY.**)

- 01 Me/Came to visit me
- 02 Business (clarify to confirm not university/college-related)
- 03 University/College-related event or business
- 04 Cayuga Lake
- 05 State Parks/Gorges/Waterfalls
- 06 Wineries
- 07 Ithaca Festival
- 08 Grassroots Festival
- 09 Farmer's Market
- 10 Dining out

- 11 Shows/Entertainment (theater, music, etc. that are not university/college-related)
- 12 Shopping
- 13 The Commons/Downtown
- 14 Sciencenter
- 15 Museum of the Earth
- 16 Johnson Art Museum
- 95 Other (specify): \_\_\_\_\_
- 96 Nothing in particular
- 99 Don't Know/Refused

7b. And which attractions or events actually motivated your overnight guests to visit the Ithaca area in the first place – that is, before even arriving, they thought about or discussed doing those things? **(DO NOT READ LIST. ACCEPT MORE THAN ONE ANSWER. PROBE AND CLARIFY.)**

- 01 Me/Came to visit me
- 02 Business (clarify to confirm not university/college-related)
- 03 University/College-related event or business
- 04 Cayuga Lake
- 05 State Parks/Gorges/Waterfalls
- 06 Wineries
- 07 Ithaca Festival
- 08 Grassroots Festival
- 09 Farmer's Market
- 10 Dining out
- 11 Shows/Entertainment (theater, music, etc. that are not university/college-related)
- 12 Shopping
- 13 The Commons/Downtown
- 14 Sciencenter
- 15 Museum of the Earth
- 16 Johnson Art Museum
- 95 Other (specify): \_\_\_\_\_
- 96 Nothing in particular
- 99 Don't Know/Refused

8. In the last academic year, while attending school (excluding the time before entering school) did you spend any nights at a lodging establishment (hotel, motel, inn, or B&B) in Tompkins County?<sup>82</sup>

**INTERVIEWER NOTES:**

- This would include unpaid rooms (i.e., gifts, prizes, etc.).

- 01 Yes
- 02 No → **SKIP TO Q10**
- 99 **DO NOT READ:** Don't Know/Refused → **SKIP TO Q10**

**IF SPENT ANY NIGHTS AT TC LODGING ESTABLISHMENT, ASK:**

9. How many room-nights in all? ("Room nights" is the number of rooms occupied multiplied by the number of nights stayed.)

\_\_\_\_\_ **999 DK/REF**

**ASK EVERYONE:**

10. What year of college are you in?

\_\_\_\_\_

<sup>82</sup> Here we only count members living at that household who stayed at local lodging while living in that household.

- 01 Freshman
- 02 Sophomore
- 03 Junior
- 04 Senior
- 05 Graduate student
- 99 **DO NOT READ:** Don't Know/Refused

11. What is your age in years?     \_\_\_ \_\_\_ years old **(99 DK/REF)**

*Those are all the questions I have. Thank you very much for your participation!*

**RECORDED BY INTERVIEWER**

**12. GENDER:**

- 01 Female
- 02 Male

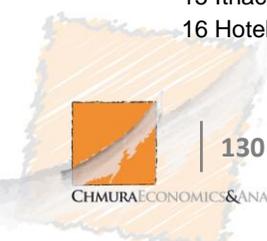
**13. WHEN SURVEY WAS COMPLETED:**

a) Time of day of survey: \_\_\_ \_\_\_ : \_\_\_ \_\_\_ 01 AM 02 PM

b1) Month	b2) Date	c) Day of Week
01 January	01 11 21	01 Monday
02 February	02 12 22	02 Tuesday
03 March	03 13 23	03 Wednesday
04 April	04 14 24	04 Thursday
05 May	05 15 25	05 Friday
06 June	06 16 26	06 Saturday
07 July	07 17 27	07 Sunday
08 August	08 18 28	
09 September	09 19 29	
10 October	10 20 30	
11 November		
12 December		

**14. PLACE OF SURVEY:**

- 01 Taughannock State Park
- 02 Buttermilk State Park
- 03 Allan Treman Marina
- 04 Robert Treman State Park
- 05 Airport
- 06 Art Museum
- 07 Bus Station
- 08 Commons
- 09 Dewitt Mall
- 10 Farmers Market
- 11 Moosewood
- 12 Museum of Earth
- 13 Plantations
- 14 Cornell University
- 15 Ithaca College
- 16 Hotel or other lodging (specify name of establishment): \_\_\_\_\_



96 Other (specify): \_\_\_\_\_

### A.5.4. Visitor Center Survey Instrument

*All answers are kept strictly confidential.*

Please complete this questionnaire only if you meet all three of these conditions:

- (1) You are a visitor to the Ithaca area.
  - (2) Your age is 18 years or more.
  - (3) You do NOT live, work, or attend school in Tompkins County.
- 

1. Is this your first visit to the Ithaca area?
  - Yes
  - No
  - Other / Don't Know / No Reply
  
2. What was the primary purpose of your visit to the Ithaca area?
  - Business
  - Leisure
  - Both Business & Leisure
  - Other / Don't Know / No Reply
  
3. Answer questions 3a and 3b only if you chose to visit the Ithaca area at least partly for leisure reasons.
  - a) What was the most important factor influencing your decision to visit the Ithaca area rather than somewhere else? \_\_\_\_\_
  - b) What secondary factor or factors were important in your decision to visit the Ithaca area?  
\_\_\_\_\_
  
4. Check all reasons below for which you are visiting the Ithaca area:
  - Visiting Family
  - Visiting Friends
  - Dropping off or picking up a student at a university or college
  - Touring a university or college with a prospective student
  - Attending the following event: \_\_\_\_\_
  - None of the above
  - Other / Don't Know / No Reply
  
5. How far in advance did you decide to take this trip?  
\_\_\_\_\_ months OR \_\_\_\_\_ days
  
6. What information sources did you use to research the Ithaca area for this trip?
  - Internet
  - Friends or Family

- Travel Agent
  - Newspaper or Magazine
  - AAA
  - Other: \_\_\_\_\_
  - Don't Know / No Reply
7. If you did use the internet, what websites did you visit?
- visitithaca.com
  - wikipedia.org
  - ci.ithaca.ny.us
  - cornell.edu
  - ithaca.edu
  - other: \_\_\_\_\_
  - None
  - Don't Know / No Reply
8. How did you travel to the Ithaca area?
- Air
  - Bus
  - Automobile
  - Other
  - Don't Know / No Reply
9. What is the length of your stay in number of nights in the Ithaca area? \_\_\_\_\_
10. If you are staying overnight, where are you lodging?
- At the following hotel, motel, or resort: \_\_\_\_\_
  - At the following B&B or inn: \_\_\_\_\_
  - Family or Friends' Place
  - Campground
  - Dorm Room
  - Other: \_\_\_\_\_
  - Don't Know / No Reply
11. On this trip to the Ithaca area, what has been most memorable about your experience?
- \_\_\_\_\_
- I arrived to the Ithaca area too recently to reply
  - Don't Know / No Reply
12. What can be improved to make the Ithaca area a more enjoyable vacation destination?
- \_\_\_\_\_
- I arrived to the Ithaca area too recently to reply
  - Don't Know / No Reply
13. What country do you live in? \_\_\_\_\_
14. If USA, what is your zip code? \_\_\_\_\_



15. What was the last grade or year of school that you completed?
- Grade School or Some High School
  - High School Diploma (Finished Grade 12)
  - 2-Year Degree
  - 4-Year Degree
  - Graduate School (Master's or PhD)
  - Other / Don't Know / No Reply
16. What is your gender?
- Female
  - Male
  - Other / Don't Know / No Reply
17. By category, what is your age in years?
- 18-24
  - 25-34
  - 35-44
  - 45-54
  - 55-64
  - 65+
  - Other / Don't Know / No Reply
18. How would you describe your household?
- Family household with own children under 18
  - Family household without own children under 18
  - Living alone
  - Other: \_\_\_\_\_
  - Don't Know / No Reply
19. Can we contact you by email for:  
Special Offers & Packages?  
 Yes  No  
Press Releases?  
 Yes  No  
If yes, please provide your email address: \_\_\_\_\_

*Thank you very much for your help!  
We hope you enjoy the rest of your visit to the Ithaca area!*

-----

OFFICE USE ONLY:  
Time of survey: \_\_\_\_\_  
Month and Date: \_\_\_\_\_  
Day of Week: \_\_\_\_\_  
Staff: \_\_\_\_\_



**2a1 response options:**

- 01 January
- 02 February
- 03 March
- 04 April
- 05 May
- 06 June
- 07 July
- 08 August
- 09 September
- 10 October
- 11 November
- 12 December

**2a2 response options:**

- 01 Winter
- 02 Spring
- 03 Summer
- 04 Fall

3a. What are ALL the attractions or events that your overnight guests actually saw or did when they visited you in 2008? **(DO NOT READ LIST. ACCEPT MORE THAN ONE ANSWER. PROBE AND CLARIFY.)**

- 01 Me/Came to visit me
- 02 Business (clarify to confirm not university/college-related)
- 03 University/College-related event or business
- 04 Cayuga Lake
- 05 State Parks/Gorges/Waterfalls
- 06 Wineries
- 07 Ithaca Festival
- 08 Grassroots Festival
- 09 Farmer’s Market
- 10 Dining out
- 11 Shows/Entertainment (theater, music, etc. that are not university/college-related)
- 12 Shopping
- 13 The Commons/Downtown
- 14 Sciencenter
- 15 Museum of the Earth
- 16 Johnson Art Museum
- 95 Other (specify): \_\_\_\_\_
- 96 Nothing in particular
- 99 Don’t Know/Refused

3. And which of those attractions or events that you just mentioned actually motivated your overnight guests to visit the Ithaca area in the first place – that is, before even arriving, they thought about or discussed doing those things? **(DO NOT READ LIST. ACCEPT MORE THAN ONE ANSWER OF THOSE MENTIONED IN Q3a. PROBE AND CLARIFY.)**

- 01 Me/Came to visit me
- 02 Business (clarify to confirm not university/college-related)
- 03 University/College-related event or business
- 04 Cayuga Lake
- 05 State Parks/Gorges/Waterfalls
- 06 Wineries
- 07 Ithaca Festival
- 08 Grassroots Festival
- 09 Farmer’s Market
- 10 Dining out
- 11 Shows/Entertainment (theater, music, etc. that are not university/college-related)
- 12 Shopping

- 13 The Commons/Downtown  
 14 Sciencenter  
 15 Museum of the Earth  
 16 Johnson Art Museum  
 95 Other (specify): \_\_\_\_\_  
 96 Nothing in particular  
 99 Don't Know/Refused

4. In 2008, did you or any member of your household, spend any nights at a lodging establishment (hotel, motel, inn, or B&B) in Tompkins County?<sup>83</sup>

**INTERVIEWER NOTES:**

- This would include unpaid rooms (i.e., gifts, prizes, etc.).

- 01 Yes  
 02 No → **SKIP TO Q6**  
 99 **DO NOT READ:** Don't Know/Refused → **SKIP TO Q6**

**IF SPENT ANY NIGHTS AT TC LODGING ESTABLISHMENT (01 IN Q4), ASK:**

5. How many room-nights in all? ("Room nights" is the number of rooms occupied multiplied by the number of nights stayed.)

**999 DK/REF**

**ASK EVERYONE:**

6. Did you reside in Tompkins County for all of 2008?

- 01 Yes → **SKIP TO Q7**  
 02 No  
 99 **DO NOT READ:** Don't Know/Refused → **SKIP TO Q7**

**IF NO (02 IN Q6), ASK:**

- 6a. How many months of 2008 did you reside in the county?

**00 LESS THAN 1 MONTH**  
**99 DK/REF**

**ASK EVERYONE:**

7. Are you a student at Cornell University, Ithaca College, or TC3?

- 01 Yes  
 02 No  
 99 **DO NOT READ:** Don't Know/Refused

<sup>83</sup> Here we only count members living at that household who stayed at local lodging while living in that household.

8. For this phone call, are you talking on a cell phone or landline?

- 01 Cell phone
- 02 Landline
- 99 **DO NOT READ:** Don't Know/Refused

**READ TO EVERYONE:** These final questions are for classification purposes only and will be kept strictly confidential.

9. What is your zip code?

**99999 DK/REF**

10. Which of the following categories does your age fall into? **(READ LIST.)**

- 01 18-24
- 02 25-34
- 03 35-44
- 04 45-54
- 05 55-64
- 06 65 or older
- 99 **DO NOT READ:** Don't Know/Refused

11. Which of the following categories includes your total household income before taxes last year? Include your own income plus all members of your household living with you.

- 01 Less than \$20,000
- 02 \$20,000 to less than \$50,000
- 03 \$50,000 to less than \$100,000
- 04 \$100,000 or higher
- 99 **DO NOT READ:** Don't Know/Refused

12. RECORD GENDER **(DO NOT ASK):**

- 01 Yes
- 02 No
- 99 **DO NOT READ:** Don't Know/Refused