

VISITOR PROFILE REPORT

Ithaca and Tompkins County



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EXECUTIVE SUMMARY

Background

Visit Ithaca and the Tompkins County Tourism Program engaged JLL to conduct an in-depth analysis of the destination's overnight visitors. This visitor profile study was conducted over the course of 18 months, from January 2018 to July 2019, and was comprised of comprehensive primary research.

Goals & Objectives

The purpose of conducting this Visitor Profile research was to:

- Provide insight related to overnight visitors coming to Ithaca and Tompkins County,
- Augment data gathered during the 2009-2010 Profile of Visitors to Tompkins County, and
- Provide observations on changes in visitor trends.

Prospective Outcomes

The results compiled from the visitor profile study should allow Ithaca and Tompkins County Tourism Program leaders to:

- Make more informed decisions on destination marketing and product development investment opportunities,
- Guide efforts to increase the destination's competitive position in the marketplace,
- Increase future visitor spending into the community, and
- Inform decisions needed for updating the overall strategic plan for the destination.

Methodology

JLL created two separate and complementary surveys in order to have the most impactful reach into the visitor community. The first survey was an online survey targeted to previous visitors. The second survey was an onsite intercept survey used to interview visitors while they were in market.

Digital Email Survey	Intercept Interviews
Past visitors with completed trip	Visitors during their trip
Email lists and databases from 2015, 2016 & 2017	Individual encounters at over 30 selected sites
Visit Ithaca inquiries, Hotels, Inns, Discovery Trail partners, retail partners, and other stakeholders	Parks, Universities, Downtown, Discovery Trail sites, Cayuga Waterfront Trail sites, Farmer's Market, Lodging providers, Events/Entertainment, Airport, and Breweries/Wineries
Surveyed from March-May 2018	Interviewed from July 2018 – July 2019*
1,400 completed surveys	670 completed interviews

The overall response rate from Overnight Visitors in 2019 was 38% higher than the 2009-2010 study.

For the purpose of this report, the results of the two methodologies have been combined into one final profile. With only a few exceptions the results of the two separate surveys yielded similar outcomes.

Highlighted Results - 2019

- Repeat visitation to Ithaca and Tompkins County is high with 76% having visited on a previous occasion.
- Based on the overall survey results, 78% of the respondents reported staying overnight and 22% identify as day trippers
- Visitors spend approximately \$366 per day while in Ithaca and Tompkins County
- Travel party size has increased to 3.3 people per trip compared to 3.0 people in 2009
- Overnight visitors are staying primarily between 2-3 nights
- Overnight visitors are largely staying in hotels/motels or inns (over 60% of results)
- Same day travel planning showed the most significant shift changing from 15% of respondents in 2009 to 2% in 2019
- Summer led the seasons with over 30% of the visits followed by a nearly even split between Spring and Fall, each at 26%.
- Visitors are primarily traveling as a family with children or as couples
- The primary reason visitors are traveling is to engage in the outdoor leisure activities
- Visitors engage in the unique dining offerings, outdoors, shopping and events when they come to the destination
- Higher education brings visitors into the destination for more than campus activities
- Visitors are highly satisfied with the experience as over 80% of respondents state they will return

OVERVIEW & METHODOLOGY

Background

Visit Ithaca engaged JLL to conduct an in-depth analysis of the destination's overnight visitors. This visitor profile study was comprised of comprehensive primary research conducted over the course of 18 months from January 2018 to July 2019. The study sought to update a previous visitor profile study conducted in 2009.

Goals & Objectives

The purpose of conducting this Visitor Profile research was to provide insight related to overnight visitors coming into to Ithaca and Tompkins County. This Visitor Profile would expand on data gathered during a 2009-2010 study and provide observations on changes to visitor trends. With this new information, Ithaca and Tompkins County tourism leaders will be able to make more informed decisions related to destination marketing and product development investment opportunities. This information will ultimately be used to strengthen the destination's competitive position in the marketplace and drive increased spending into the community. The Visitor Profile results would provide a first step in updating the overall strategic plan for the destination.

Research Methodology

JLL created two separate and complementary surveys in order to have the most impactful reach into the visitor community. The first survey was an online survey targeted to previous visitors. The second survey was an onsite intercept survey used to interview visitors while they were in market. This methodology was provided to the Ithaca/Tompkins County Client Committee overseeing the consultant's work and direction.

The online survey was distributed to individuals gathered from tourism partner email databases including the Visit Ithaca visitor inquiry database, hotel databases, Discovery Trail partner databases, retail partner databases and other stakeholder and partner businesses' databases. This outreach supported the effort to achieve over 1,400 completed online surveys.

The intercept survey was conducted over a 12-month period to collect data from visitors during all times of year at over 30 locations across the county (the Appendix of this report contains the list of locations). Conducting the intercept survey on-site at locations determined in conjunction with the Ithaca/Tompkins County Convention and Visitors Bureau and its partners, ensured that critical visitor locations were covered. Each location was monitored for its overall performance both in overall visitor encounters and in surveys collected from overnight visitors. Locations were adapted throughout the process to accommodate weather constraints and underperforming locations for overnight visitation. In total, the intercept program secured over 670 completed, in-person visitor surveys. The following table displays both the number of individuals encountered (enc.) and the number of interviews (int.) with overnight travelers conducted.

Location	July – Sept.	Oct. – Dec.	Jan. – Mar.	Apr. – June	Total Int.
Buttermilk Falls State Park (OUTDOORS CATEGORY)	100 enc. 9 int.	160 enc. 11 int.	160 enc. 11 int.	60 enc. 2 int.	33
Taughannock Falls State Park (OUTDOORS)	220 enc. 23 int.	140 enc. 12 int.	100 enc. 7 int.	40 enc. 5 int.	47
Ithaca Falls (OUTDOORS)	120 enc. 9 int.	260 enc. 9 int.	120 enc. 11 int.	100 enc. 6 int.	35
Robert Treman State Park (OUTDOORS)	100 enc. 12 int.	140 enc. 13 int.	120 enc. 6 int.	160 enc. 10 int.	41
Cornell Univ. (COLLEGE)	80 enc. 8 int.	80 enc. 10 int.	40 enc. 4 int.	160 enc. 8 int.	30
Ithaca College (COLLEGE)	100 enc. 9 int.	160 enc. 11 int.	160 enc. 11 int.	60 enc. 2 int.	33
Ithaca Commons (DOWNTOWN)	220 enc. 23 int.	140 enc. 12 int.	100 enc. 7 int.	40 enc. 5 int.	47

Location	July – Sept.	Oct. – Dec.	Jan. – Mar.	Apr. – June	Total Int.
Restaurant Row (DOWNTOWN)	120 enc. 9 int.	260 enc. 9 int.	120 enc. 11 int.	100 enc. 6 int.	35
Sciencenter (DISCOVERY TRAIL)	100 enc. 12 int.	140 enc. 13 int.	120 enc. 6 int.	160 enc. 10 int.	41
Museum of the Earth (DISCOVERY TRAIL)	80 enc. 8 int.	80 enc. 10 int.	40 enc. 4 int.	160 enc. 8 int.	30
Cayuga Nature Center (DISCOVERY TRAIL)	60 enc. 2 int.	60 enc. 1 int.	200 enc. 1 int.	120 enc. 12 int.	16
Tompkins County Public Library (DISCOVERY TRAIL)	80 enc. 1 int.	100 enc. 0 int.	100 enc. 5 int.	180 enc. 14 int.	20
Cornell Lab of Ornithology (DISCOVERY TRAIL)	60 enc. 16 int.	60 enc. 15 int.	N/A	180 enc. 8 int.	39
The History Center (DISCOVERY TRAIL)	60 enc. 2 int.	60 enc. 7 int.	N/A	80 enc. 3 int.	12
Cornell Botanic Gardens (DISCOVERY TRAIL)	100 enc. 20 int.	60 enc. 2 int.	40 enc. 1 int.	60 enc. 7 int.	30
Johnson Museum of Art (DISCOVERY TRAIL)	60 enc. 8 int.	80 enc. 11 int.	100 enc. 7 int.	220 enc. 25 int.	51
Cayuga Waterfront Trail / Cass Park	140 enc. 13 int.	120 enc. 1 int.	200 enc. 1 int.	220 enc. 10 int.	25
Stewart Park	140 enc. 24 int.	80 enc. 0 int.	60 enc. 2 int.	60 enc. 5 int.	31

Location	July – Sept.	Oct. – Dec.	Jan. – Mar.	Apr. – June	Total Int.
Steamboat Landing Farmer’s Market	200 enc. 15 int.	260 enc. 16 int.		60 enc. 0 int.	31
Hotels/Accommodations	120 enc. 7 int.	60 enc. 3 int.	120 enc. 13 int.	440 enc. 35 int.	58
Ithaca Airport	120 enc. 15 int.	160 enc. 13 int.	140 enc. 11 int.	20 enc. 3 int.	42
Beverage	220 enc. 22 int.	140 enc. 15 int.	120 enc. 5 int.	40 enc. 0 int.	42
Performance/Event	220 enc. 12 int.	40 enc. 3 int.	20 enc. 1 int.	20 enc. 0 int.	16

The interviews were spread out over the course of the both the days of the week and months of the year that the facility was open. Times were staggered along those days to provide a comprehensive coverage of each site.

The combined approach delivered nearly 2,100 completed visitor surveys. In comparing the overall results from both the digital and the intercept approaches, nearly every question yielded similar results with a few noted exceptions. For this reason, the primary results were consolidated into a blended compilation that serves as the best glimpse of overall visitor activity. The level of responses achieved with both surveys allows the results to be directly blended without the need for defined weighting to balance for differences in response level. The insights gleaned from the survey results will support Visit Ithaca and the Tompkins County Tourism Program’s destination marketing and product development efforts for future years to come.

RESULTS & ANALYSIS

Introduction:

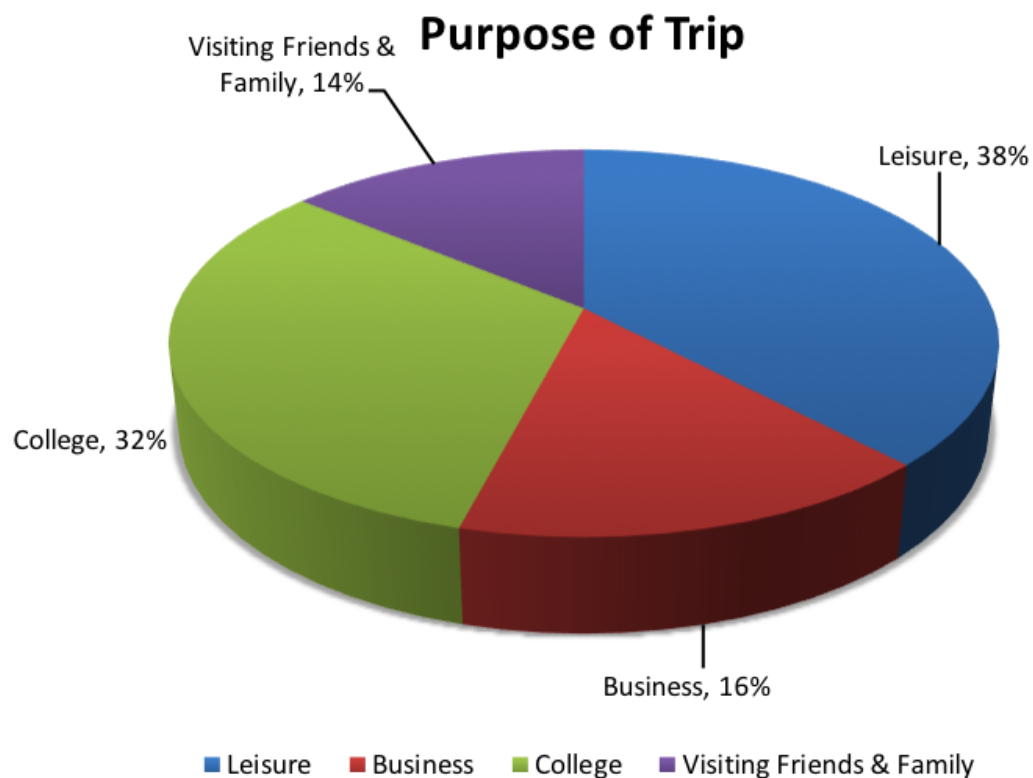
The data gathered through this visitor profile study provides a true glimpse at the travel patterns, activities and demographics of overnight visitors to Ithaca and Tompkins County. Where applicable and relevant, the data is presented to show any striking differences between the visitors interviewed and those taking the digital survey. When appropriate, the 2019 data is directly compared to data from the 2009 study.

In summary form, the visitor profile changed slightly between 2009 and 2019 with a few notable exceptions in mode of transportation and travel planning time.

Comparison of Highlights	2019 Overall Results	2009 Overall Results
Repeat Visitation	76% repeat	69%
Overnight Percentage	78% staying overnight	63%
Spending	\$366 per party per day	\$331
Travel Party Size	3.3 people	3.0
Nights Spent	2-3 nights	2.4
Mode of Transportation	21% air	10%
Stays in Hotel/Motels/Inns	60%	50%
Same day Travel Planning	2%	15%
Primary Reason for Travel	Outdoor Leisure Activities	Gorges & State Parks*
Visitor Satisfaction	80% will return	81%

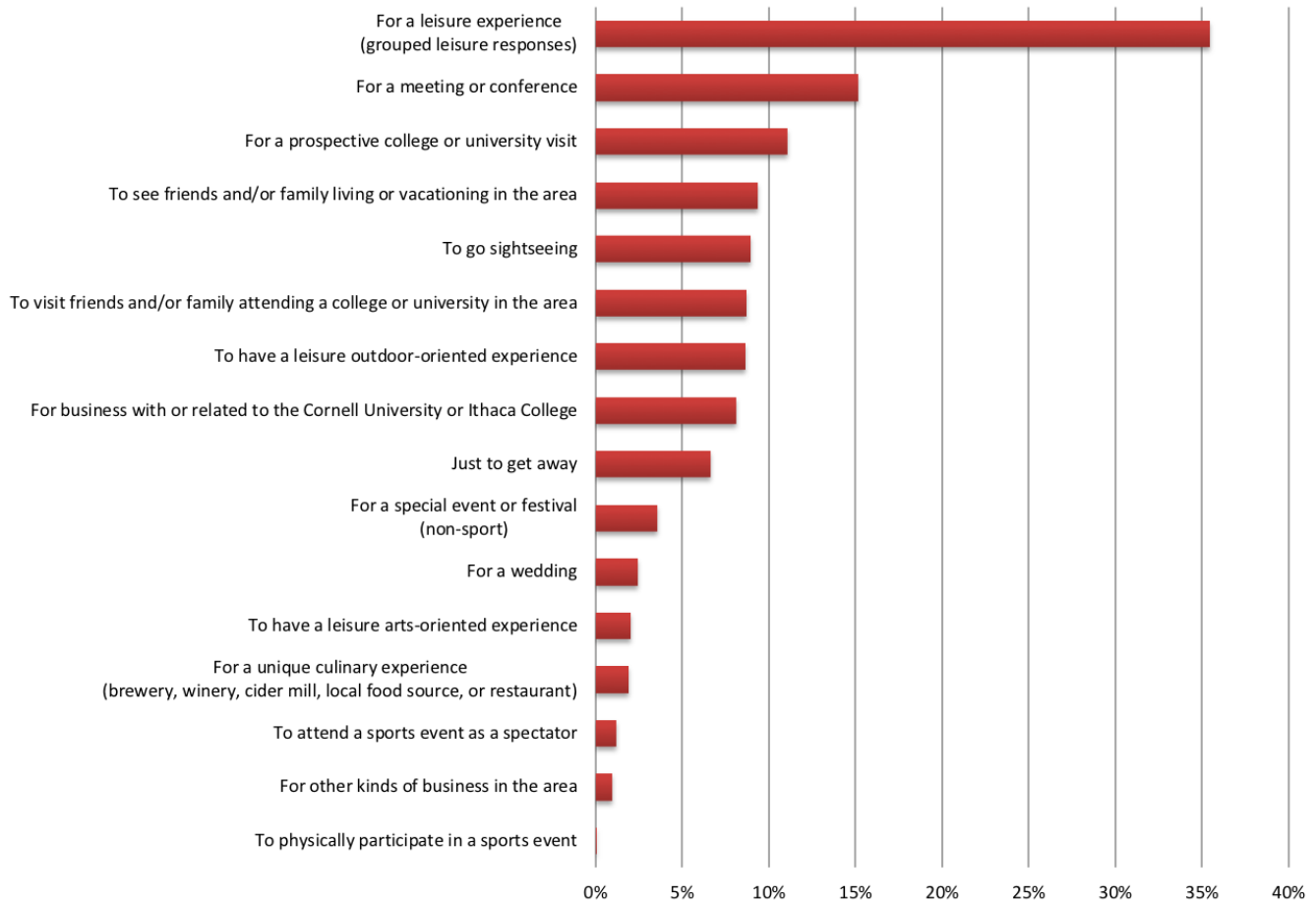
Primary Reason for Travel

The 2019 visitor profile methodology sought to provide needed detail on the true reasons that prompted the trip to Ithaca and Tompkins County. Those responses were clustered into traditional broader categories that included leisure related reasons (38% of response), college related reasons (32%), business related reasons (15%) and friends/family reasons (14%).



The detail of all respondent choices and responses more thoroughly displays the level of detail available on visitation motivators.

Primary Reason for Trip



Of the detailed motivators, there are three that show opportunities for direct engagement through leisure-based marketing and outreach, “Sightseeing” (8% of respondents), “Leisure outdoor-oriented experience” (8%) and “Just to get away” (6%). These categories as sub-sets of a general leisure experience provide definite opportunities for focused, strategic pursuit and investment.

The singular role of both visiting friends and/or family living or vacationing in the area and visiting friends and/or family attending a college or university in the area shows the importance of this market segment to overall travel in Ithaca and Tompkins County. Efforts to educate local residents and students on destination experiences and offerings will be an important role within the overall tourism structure, but the connection to paid overnight stays

in the area prompts cautious consideration regarding substantial investments of tourism tax dollars.

Primary Reason for Trip: Higher Education

Of the respondents who indicated that their primary purpose for visiting Ithaca and Tompkins County related to higher education (32% of the overall total), more than one third of those visitors (35%) were primarily in the area to visit a student. College tours and on-campus events accounted for 26% and 25% of higher education reasons respectively. Cornell University represented 96% of the survey respondents’ selections for which higher education institution they visited.

Additionally, 20% of those visiting a higher education institution were touring unrelated to a prospective collegiate commitment. This a unique attribute of the higher education component in Tompkins County and speaks to the desirability of a non-traditional campus experience.

Meeting or conference participation is notable at 12% given that Ithaca and Tompkins County does not have a dedicated conference center.

Higher Education Participation	
Visiting a student	35%
College tour	26%
On-campus event	25%
Tour (sightseeing on campus not related to a college tour)	20%
Attend a class, course, training or workshop	13%
Meeting or conference	12%
Alumni event	7%
Sports (spectator)	4%
Academic camp	4%
Sports (participatory including camps)	2%
Certification or re-certification of a specific license or designation	0%

Length of Stay

Based on the overall survey results, 78% of the respondents reported staying overnight and 22% identify as day trippers.

The majority of overnight respondents reported staying 2-3 nights.

Just over 24% of the total responses stated one night as the length of stay.

A combined 65% of overnight results between one and three nights helps define Ithaca and Tompkins County's position as a short getaway destination.

Ithaca and Tompkins County maintains some specific market opportunity with extended stays (over 5 nights) as 15% of combined respondents.

Length of Stay			
Intercept		Online	
1 night	23%	1 night	26%
2-3 nights	45%	2-3 nights	35%
		3-4 nights	18%
4-5 nights	11%	4-5 nights	7%
5-6 nights	8%		
6+ nights	10%		
		5-10 nights	10%
		10+ nights	2%

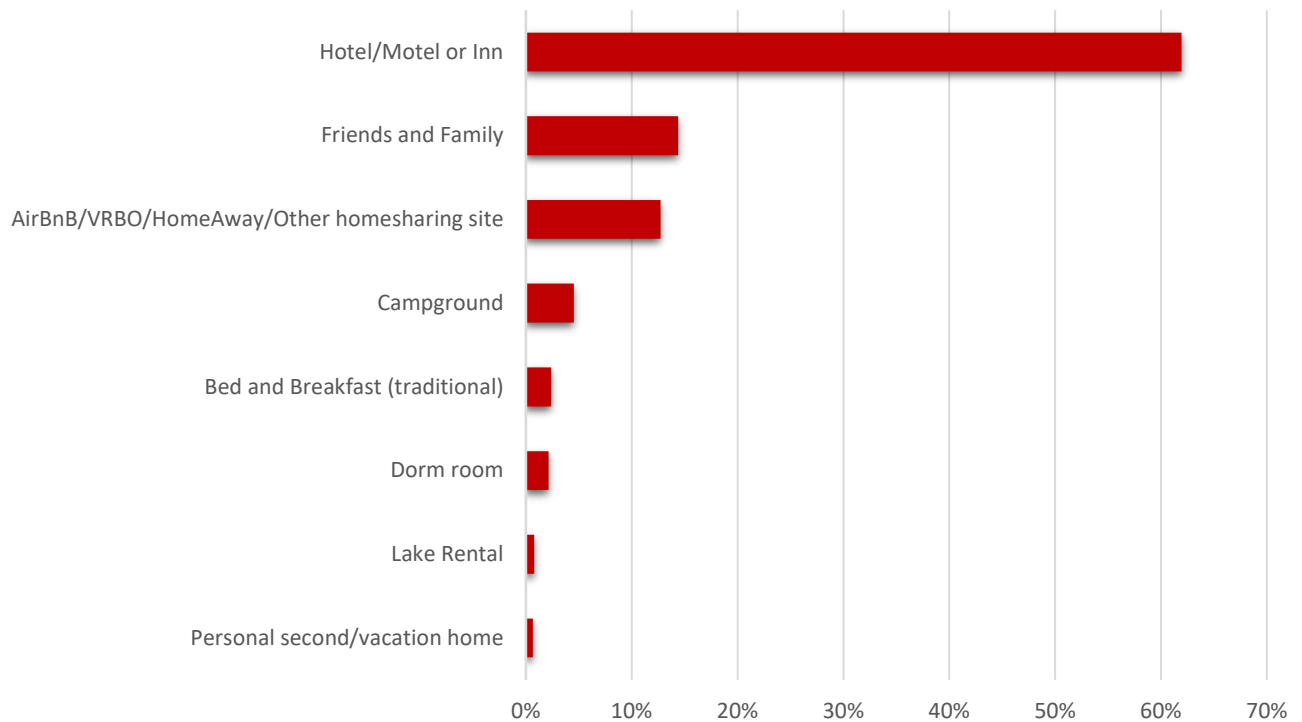
Overnight Visitors Type of Accommodations

When asked about their accommodations for their overnight stays, 63% of all respondents stayed in a hotel/motel or inn.

Visitors staying with friends and family account for 13% of all visitors.

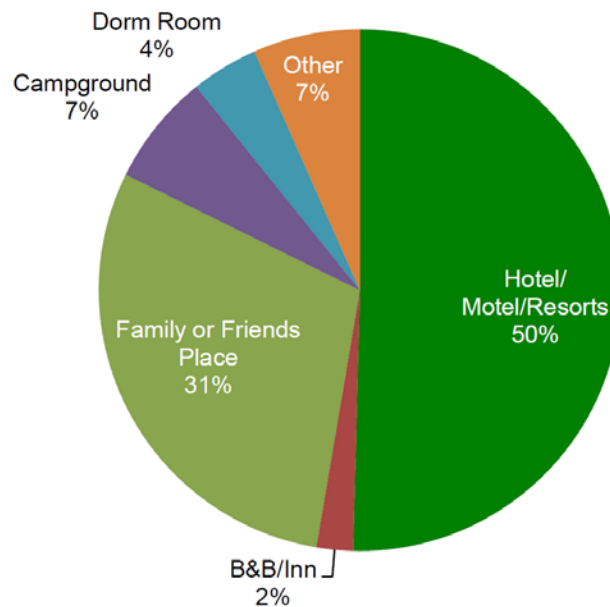
The home sharing platforms of Airbnb/VRBO/HomeAway and other similar services account for another 12% of all visitors staying overnight.

Overnight Accommodations
(all responses)



The 2019 Visitor Profile study results contrast significantly from the results gathered in 2009. Most pronounced in these differences is the emergence of the homesharing/vacation rental market throughout Ithaca and Tompkins County. In 2009, the small incidents of home rentals were included in within an “Other” category that consisted of 7% of overall overnight accommodations responses.

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



Lodging Arrangements graph from *PROFILE OF VISITORS TO TOMPKINS COUNTY*

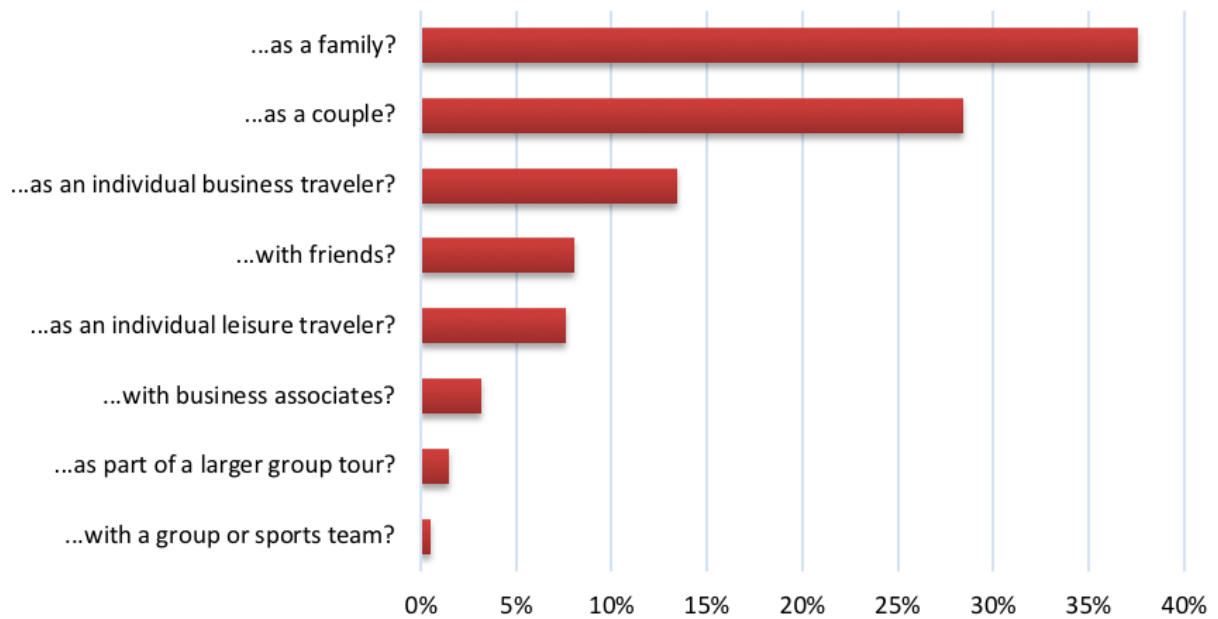
When the 2019 results are compared to the 2009 report, homesharing appears to have impacted stays with family and friends in the most significant manner. This segment dropped from 31% of overnight stays in 2009 to approximately 15% in 2019.

Hotel/Motel stays actually increased from 50% to nearly 62% across the two different studies. Presumptions on whether this shift related to increases in hotel supply or demand for the area require additional study. Understanding overall trends and market performance in the area’s accommodations sector fall outside the context of the general visitor profile but can be interpreted through analysis of other secondary research sources.

Travel Party

The most prominent visitor party to Ithaca and Tompkins County were Families traveling with Children at 38% of all responses.

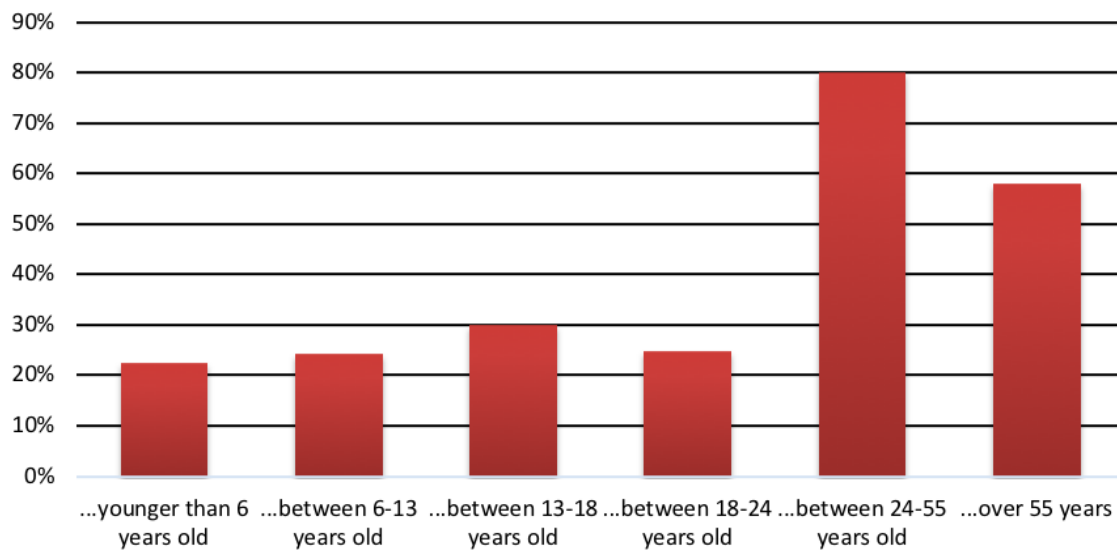
Travel Party Types



The average travel party size was 3.3 people, slightly larger than the 3.0 people staying overnight garnered from the 2009 Visitor Profile.

Adults accounted for 2.4 people of the travel party with children under 18 accounting for the remainder. Although children between 13-18 years of age represented the largest category of accompanying travelers, the difference between age groupings was largely nominal.

Travel Party by Age Group (all people in respondents' trip)



The section beginning on Page 34 provides comparisons of top Travel Party Types.

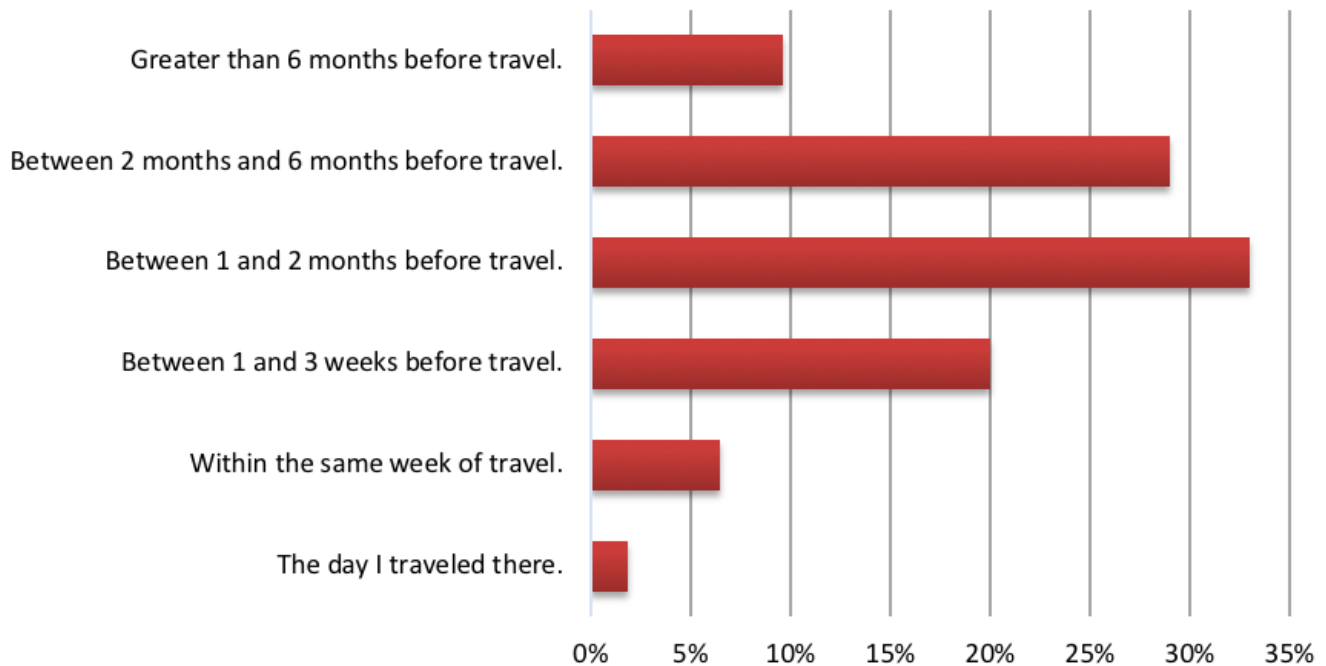
Travel Planning

The respondents largely planned their trip to Ithaca and Tompkins County between one and two months (33% of responses) prior to their trip. These results match well with the 2009 profile.

The 2019 respondents showed a slight propensity to take more travel planning time than the 2009 results. Those respondents that indicated travel planning of less than one month, not including those deciding upon the day of travel went from 30% in 2009 to 26% in 2019.

Same day travel planning showed the most significant shift changing from 15% to 2%. This could be attributed to the 2019 methodology of reaching a broader audience of actual visitors compared to the 2009 results which focused only on intercept surveys at specific locations within the County.

Travel Planning Timeframe



Visitors used multiple sources of information to plan their trip.

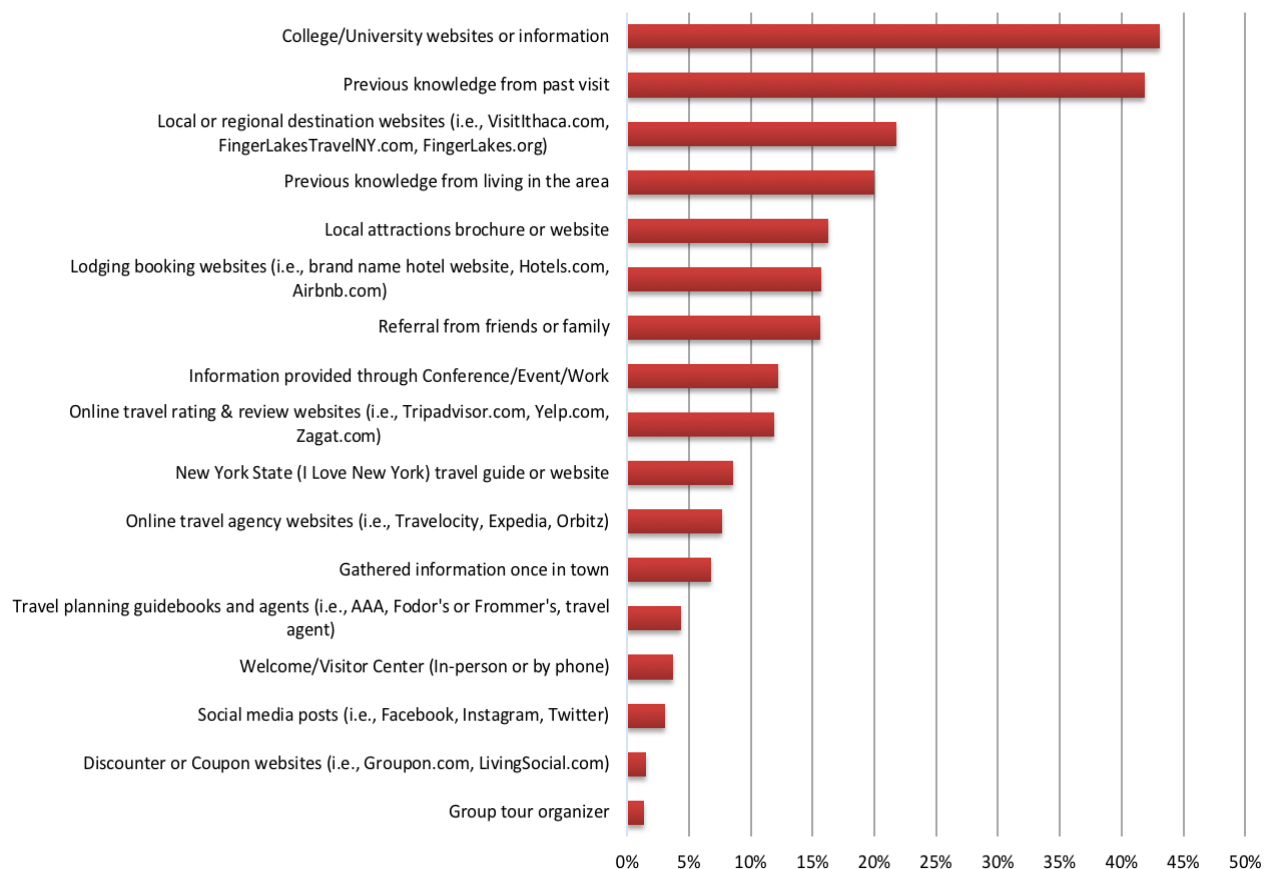
Many visitors are utilizing higher education websites (43%), regardless of whether they are visiting a higher education facility.

Additionally, as 76% of visitors are repeat, many are relying on prior knowledge of the destination with 42% of all visitors selecting that option.

The third most utilized resource is local or regional destination websites (*visitors were shown these options: VisitIthaca.com, FingerLakesTravelNY.com, FingerLakes.org*) with 22% of all visitors using online destination resources.

Internet resources were the most predominant planning tool cited in 2009 along with previous destination experience.

Travel Planning Resources



Seasonality

Over 80% of respondents indicated having visited Ithaca and Tompkins County from April to November (Spring, Summer and Fall).

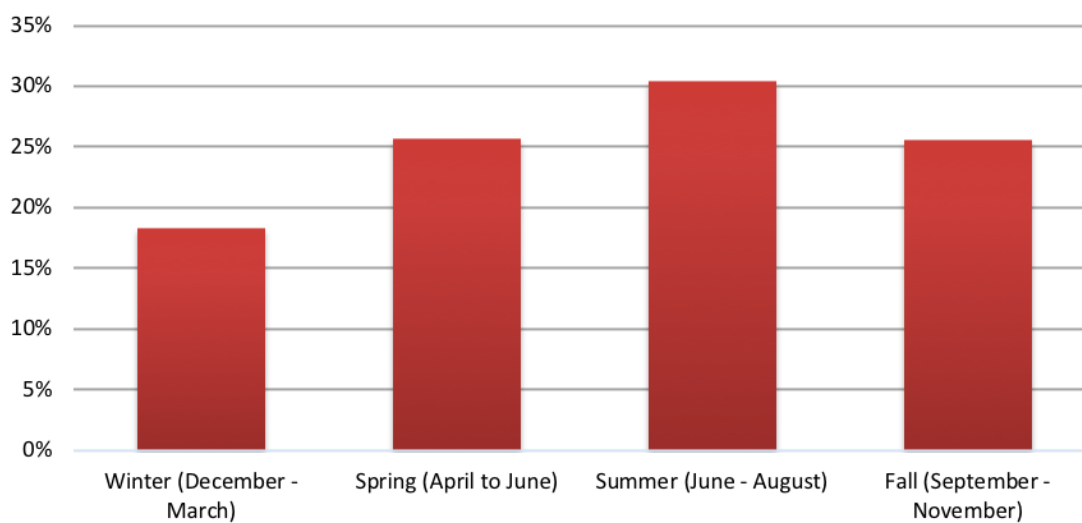
Summer led the seasons with over 30% of the visits followed by a nearly even split between Spring and Fall, each at 26%.

This seasonality marks a significant shift from the 2009 profile where the combined months of July and August captured 30% of the total seasonal visitation volume.

The 2019 results indicate that Tompkins County is becoming a more balanced year-round destination. The peaked bell curve of seasonal visitation shown in the 2009 profile has dramatically flattened within the 2019 study, showing that the 10-year trend has successfully pushed visitation into shoulder periods.

Additional comparisons of seasonality to overnight lodging performance patterns needs to be explored more deeply through secondary data sources and Tompkins County room tax collections trends.

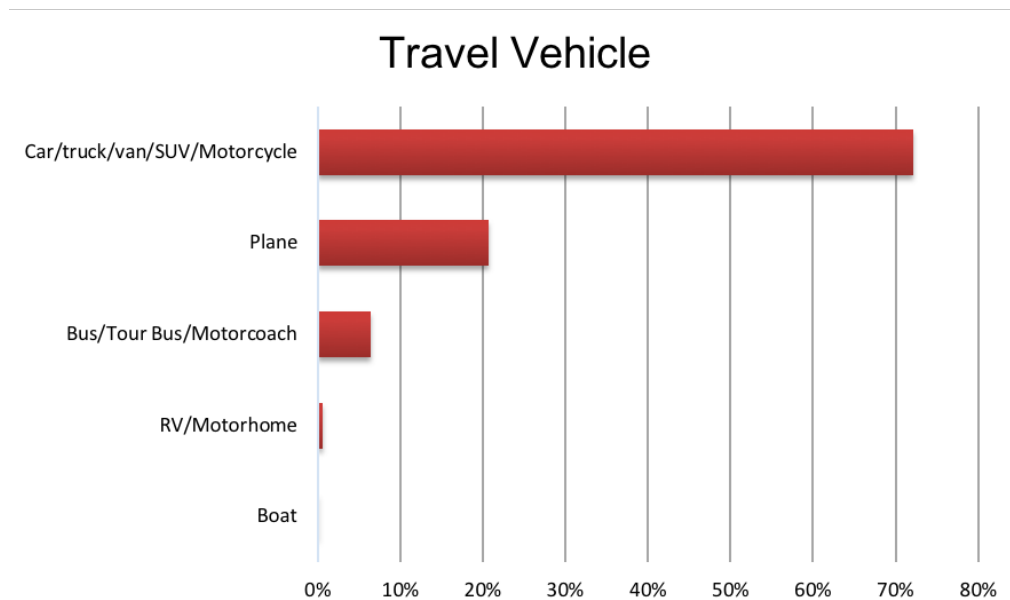
What time of year did you travel to Ithaca/Tompkins County?



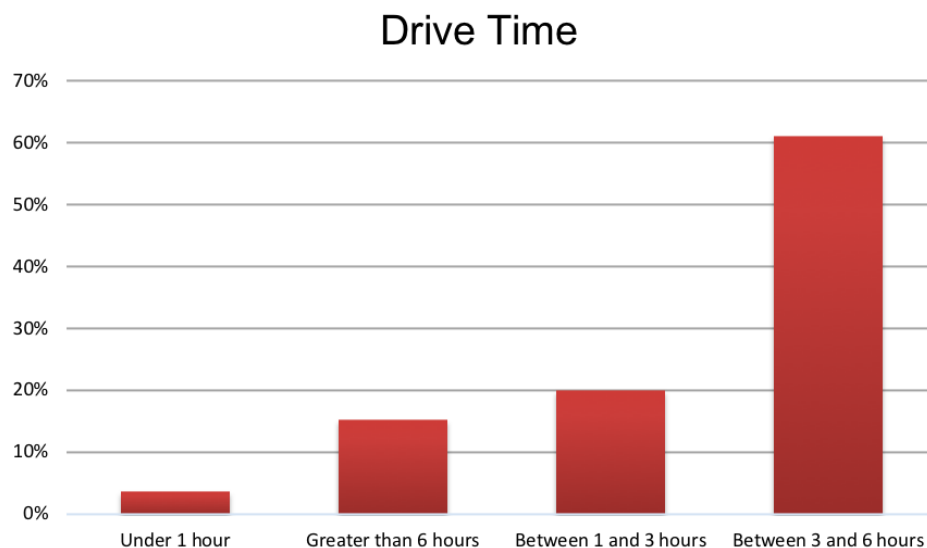
Travel by Arrival Type

Included only within the digital survey.

Respondents were over three times more likely to arrive in Ithaca and Tompkins County by automobile than any other mode of transportation.



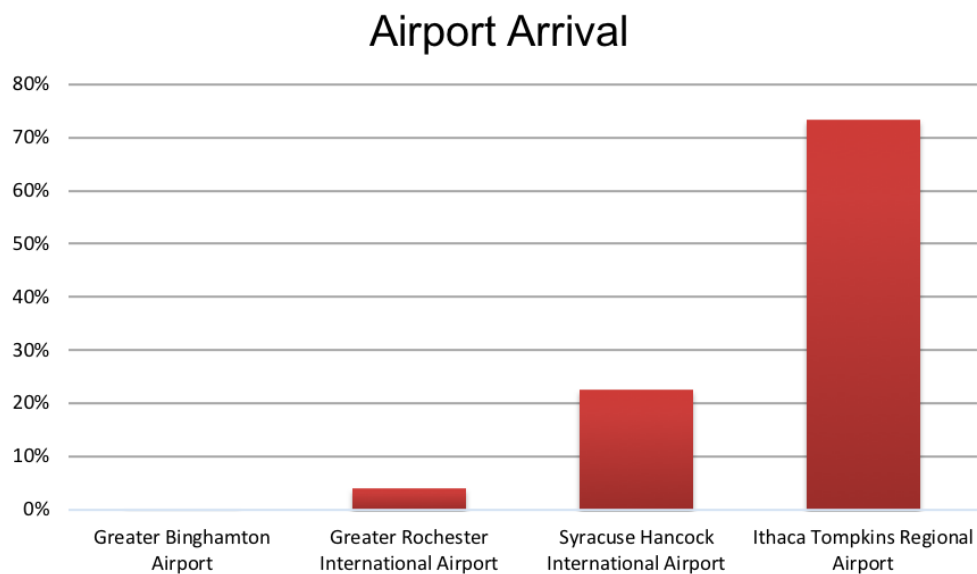
The 72% of respondents that drove to the destination typically (60%) traveled between 3 and 6 hours for their overnight stay.



Air travel to Ithaca and Tompkins County showed significant growth from the 2009 results as those respondents indicating that they flew in grew from 14% to 20%. This change could be reflective of the 2019 methodology to reach more visitors via online database surveying and intercepts on site at the airport.

Visitation tracking of enplanements and deplanements in airports servicing the area should be examined for overall presumptions of true travel patterns.

Of those who arrive by plane (21%), over 73% arrive into Ithaca Tompkins Regional Airport and 23% arrive into Syracuse Hancock International Airport.



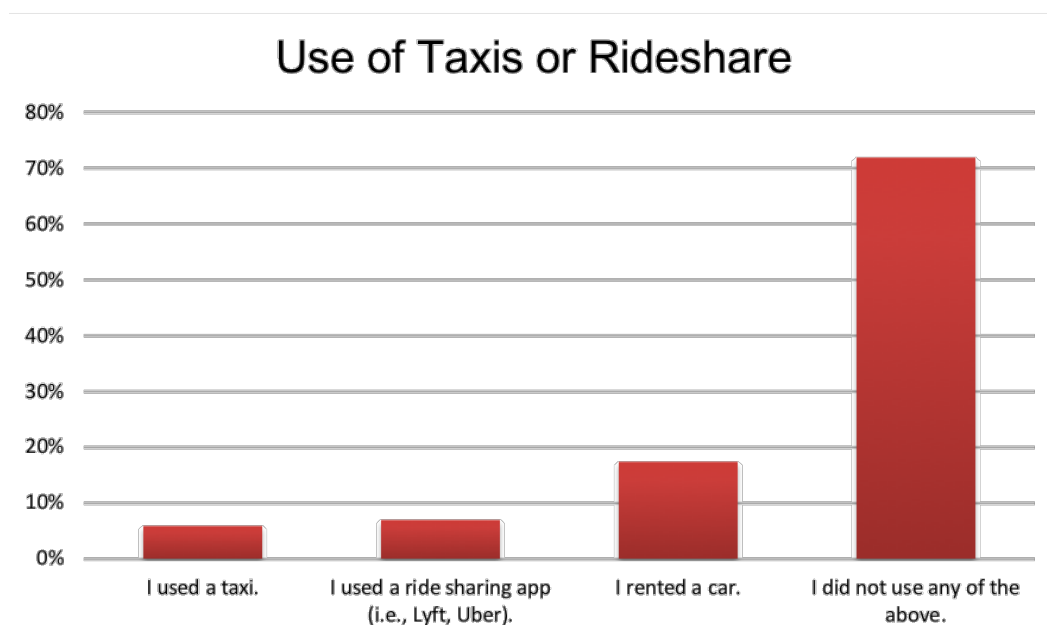
Travel Within the Destination

Included only within the digital survey.

As the majority of visitors are arriving by vehicle, **over 70% of the overall respondents indicate that they do not utilize other transportation** while they are in the destination.

Less than 15% of respondents indicated using either a rideshare app or taxi while traveling within the area.

Conclusions on alternative modes of transportation cannot be derived without further surveying on visitor usage. This includes local shuttles, scooters, bikes, walking and public buses.

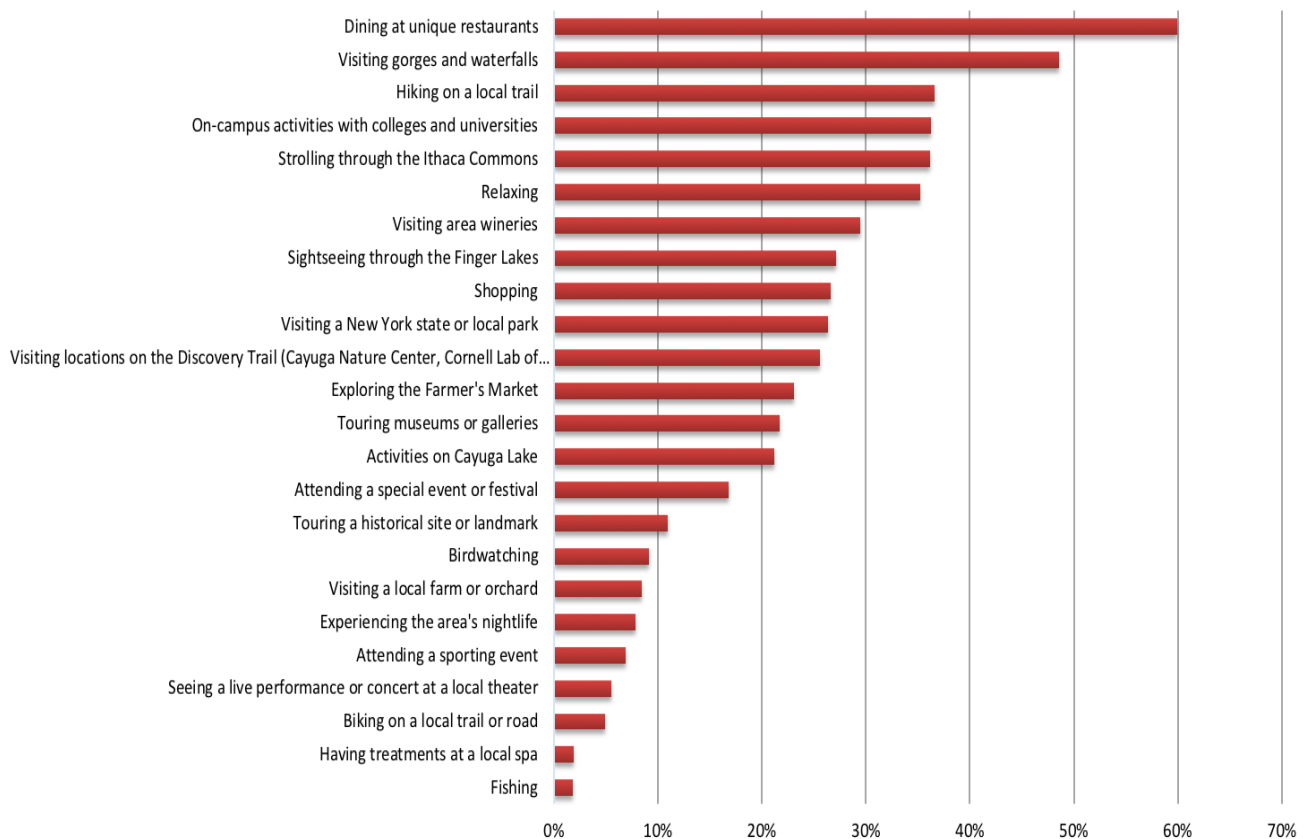


Additional Activities

There is a variety of additional activities options available to visitors to Ithaca and Tompkins County. Respondents were prompted to choose several options from a larger menu of things to see and do while in Ithaca and Tompkins County. It should be restated that these activities did not constitute the primary motivator for travel, but rather provided the additional aspects that visitors participated in while on their trip.

Dining at unique restaurants was the leading additional activity with 60% of the respondents selecting that item. These results mirror findings from other destinations, and do not constitute justification for a dedicated pursuit of culinary tourism. The experiential product nature of Ithaca within the Finger Lakes region and its bountiful wineries and agricultural offering supplies a context for culinary activities while visiting the area, but this was not found to be a key motivator.

Additional Activities



Nearly 50% of all respondents selected “Visiting gorges and waterfalls” followed by 36% “Hiking on local trails” as the next two most prominent visitor activities.

“On-campus activities with colleges and universities” were also selected by 36% of respondents.

“Strolling through Ithaca Commons” and “Relaxing” fall into this top tier grouping of most selected activities.

Regional sightseeing and shopping options provided a secondary grouping of additional activities as respondents indicated their participation in “Visiting area wineries” (29%), “Sightseeing through the Finger Lakes” (27%), “Shopping” (26%), “Visiting a New York State or local park” (26%), “Visiting locations on the Discovery Trail” (25%), “Exploring the Farmer’s Market” (23%), “Touring museums or galleries” (22%) and “Activities on Cayuga Lake” (21%).

The survey probed respondents on several detailed activity groupings including Park Visitation, Lake Activity Participation, Visitation along the Discovery Trail and awareness of the Cayuga Waterfront Trail.

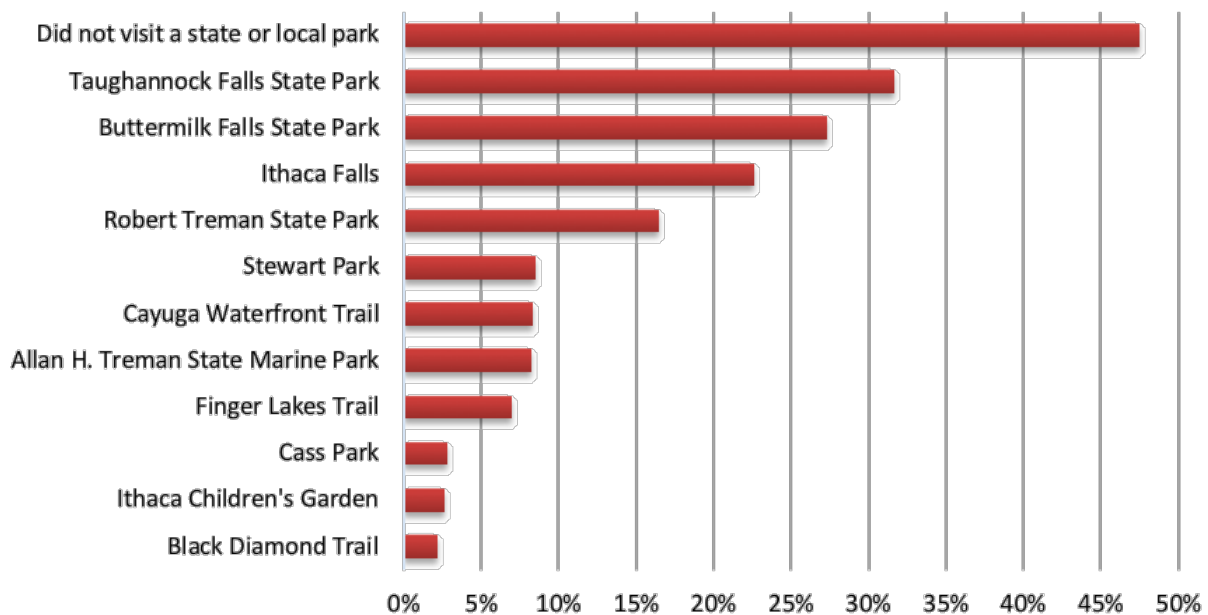
Additional Activities: Park Visitation
Included only within the digital survey.

Of all visitors surveyed, over 50% visited parks in the area. Of the 53% that visited parks, 74% of these respondents reported visiting more than one park. Taughannock Falls State Park and Buttermilk Falls State Park had the highest visitation at 32% and 27% respectively.

Ithaca Falls is the third most visited with 23% of visitors surveyed selecting that option.

It is worth noting that the selection (or lack thereof) of Visiting a New York State or Local Park response level does not necessarily correlate to actual park visitation. It was generally concluded that many respondents may not have been aware that they were visiting a specific park while hiking or viewing gorges/waterfalls. This finding perhaps offers partnership opportunities to improve understanding of the care and nurturing of these sites, but deeper understanding should potentially be gathered in advance of programming and investment of resources.

Area Park Visitation



Additional Activities: Lake Activity Participation

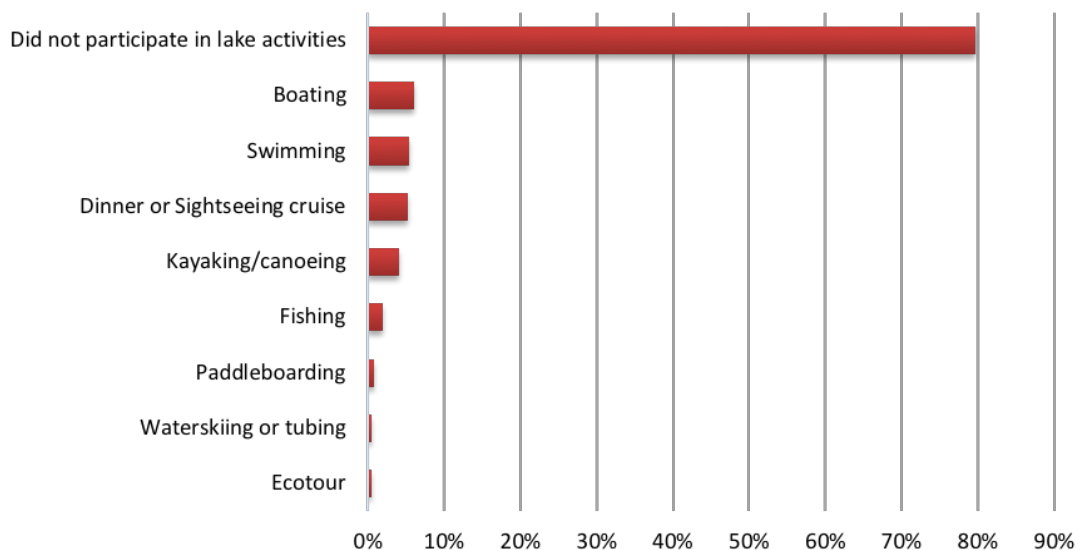
Included only within the digital survey.

Just over 20% of all visitors surveyed stated they participated in activities on Cayuga Lake. Of the various Cayuga Lake activities provided within the detailed survey question, respondents indicated a greater level of participation in Boating (6%), swimming (5%), and Dinner or sightseeing cruises (5%). Paddle sports (kayaking, canoeing and paddleboarding) represented a combined 6% of responses. Fishing represented 2% of the lake activity selections.

When respondents provided open-ended comments to this question, many noted that while they did not participate in the activities offered, they simply enjoyed being lakeside.

The moderate level of responses in Lake Activities suggests a modification to the role of Cayuga Lake in marketing material for Ithaca and Tompkins County. The lake serves as a dynamic backdrop to the gorges, universities and unique assets of the area. Emphasis on active recreational pursuits should be balanced against the more dramatic travel motivators that draw travelers to the area.

Lake Activity Participation



Additional Activities: Discovery Trail
Included only within the digital survey.

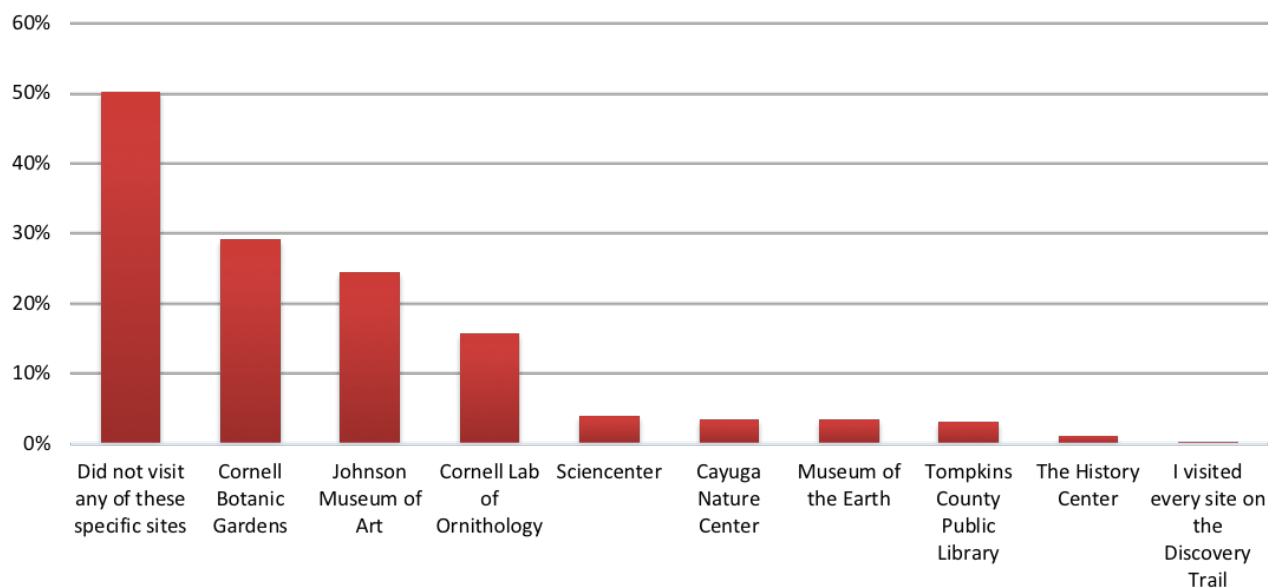
When asked if respondents had heard of the Discovery Trail, 32% stated that they had heard of the Discovery Trail and the attractions within it. Additionally, the intercept portion of the survey collected responses from visitors on-site at all of the Discovery Trail locations.

Of those respondents that went to a Discovery Trail museum or attraction, 83% visited more than one of the sites.

In similar comparison to parks, 50% of all respondents stated they did not visit any of the specific Discovery Trail member sites. The top three sites visited (representing 70% of visitor engagement) are related to Cornell University.

It should be noted that this visitor profile study is not suited to measure or project visitor volume, nor does it serve as a visitor tracking model. The focus on overnight visitors was of primary focus to determine overall visitor profile trends. Certain Discovery Trail museums and attractions are vitally important to the area’s reputation as a distinctive place to visit and a vibrant place to live despite not showing pronounced responses from the overnight visitors surveyed for this profile. These quality of life sites continue to play a role in providing activities for daytrippers or local residents despite not driving overnight visitation.

Discovery Trail Museums and Attractions

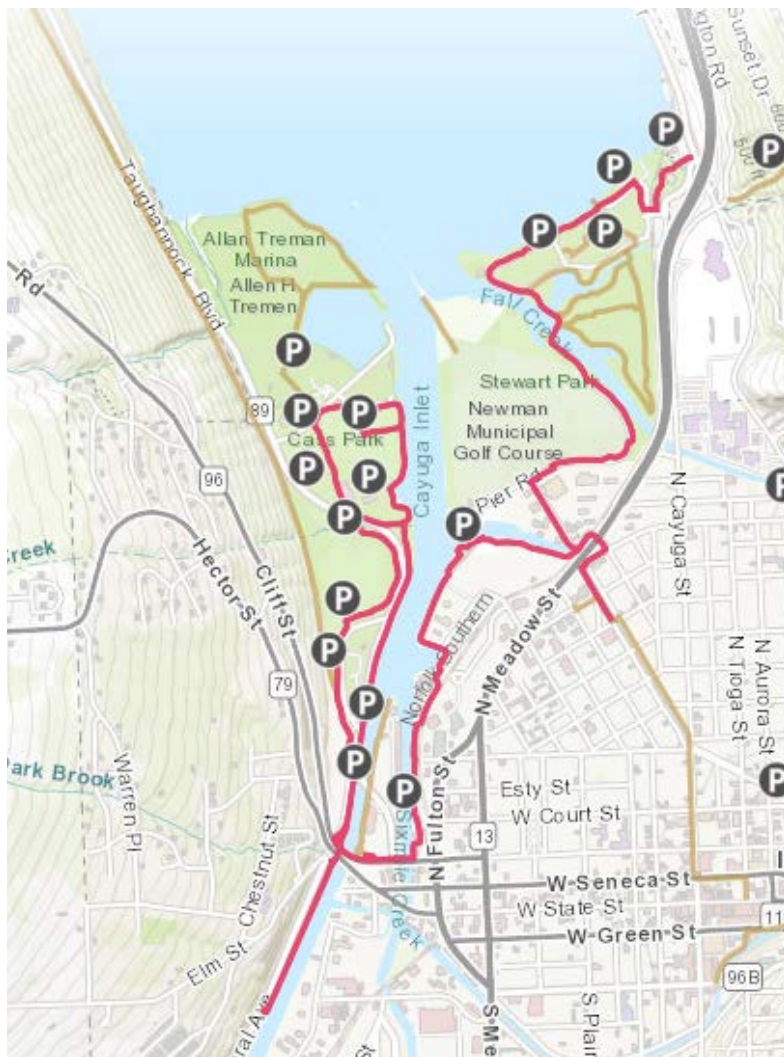


Additional Activities: Cayuga Waterfront Trail
Included only within the digital survey.

When asked if respondents had heard of the Cayuga Waterfront Trail, 41% stated that they had heard of the Cayuga Waterfront Trail and the destinations within it.

Although 41% is a relatively high level of awareness for a specific local travel experience, the question arises on whether this awareness is directly connected to name of Cayuga Lake compared to the actual trail sites.

The intercept portion of the survey collected responses from visitors at all of the Cayuga Waterfront Trail locations.



Visitor Feedback

Positive Perception

Included only within the digital survey.

Respondents expressed a highly positive impression of Ithaca and Tompkins County. When asked how experiences in Ithaca and Tompkins County compare with other places they have visited, Ithaca and Tompkins County received four out of five stars.

These respondents were asked about their likelihood of returning to Ithaca and Tompkins County and **over 91% responded that they would return.**

When asked if they would recommend the destination to friends and family, 68% said they would recommend Ithaca and Tompkins County for a vacation and 85% said they would recommend the destination for a getaway.

When these results are combined with the data on overall length of stay, the importance of shorter length of stay visits becomes more pronounced for Ithaca and Tompkins County. Understanding how to properly message travel related promotions is vital for creating proper connectivity to targeted audiences.

Return & Recommend			
Likelihood to Return (regardless of reason)		Likelihood to Recommend	
Yes	91%	For vacation (5-7 nights)	68%
No	9%	For a getaway (1-3 nights)	85%

Visitor Feedback: Alignment with Positive Statements

Included only within the digital survey.

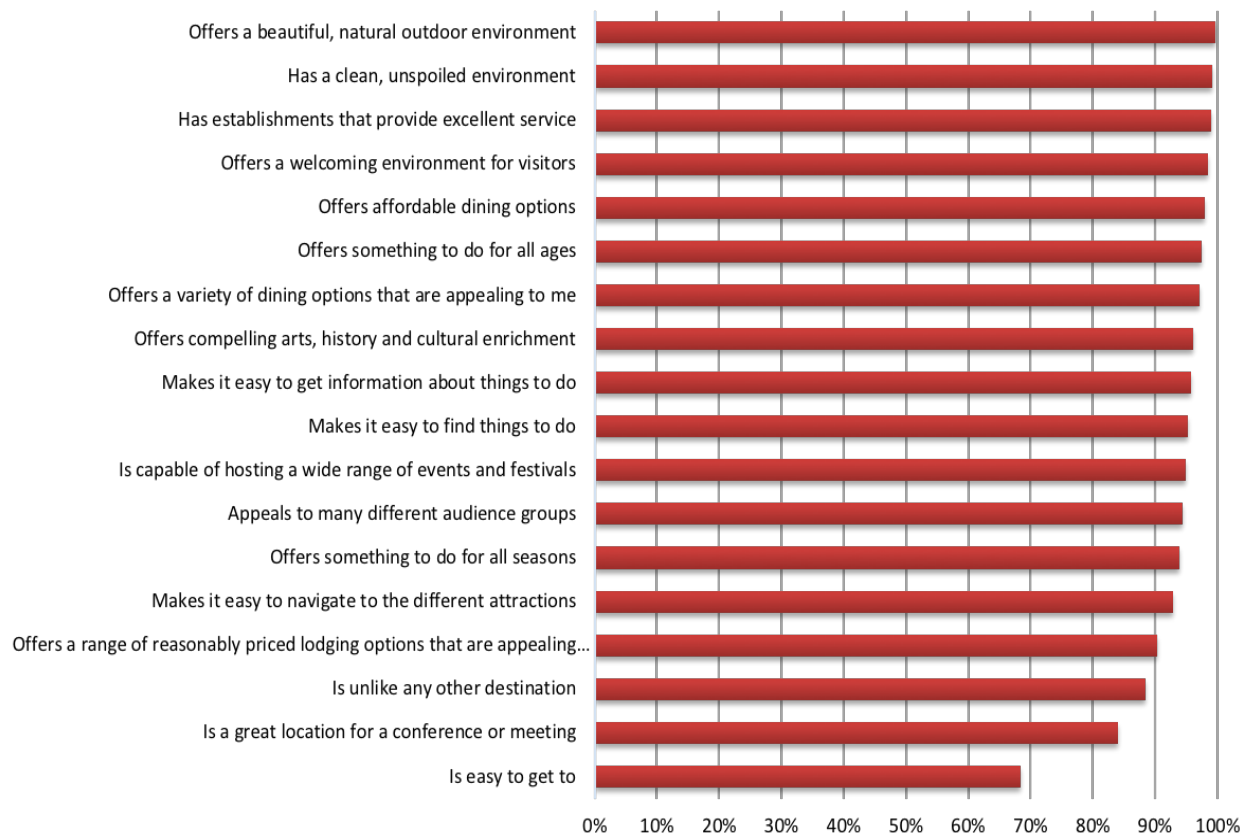
Visitors were asked about how Ithaca and Tompkins County aligns with a variety of destination related attributes and descriptions.

Overall the destination received very high remarks, with all but one statement achieving over 80% feedback that the statements described Ithaca and Tompkins County “somewhat well” or “extremely well”.

The lowest score in this set of statements was “Is easy to get to” with the combined scores achieving a 68% rating.

“Is easy to get to” was not an option provided in the 2009 profile, but “Roads and Traffic” was listed in that study as the top aspect “not enjoyed”.

Alignment with Statements



Visitor Feedback: Product Enhancements

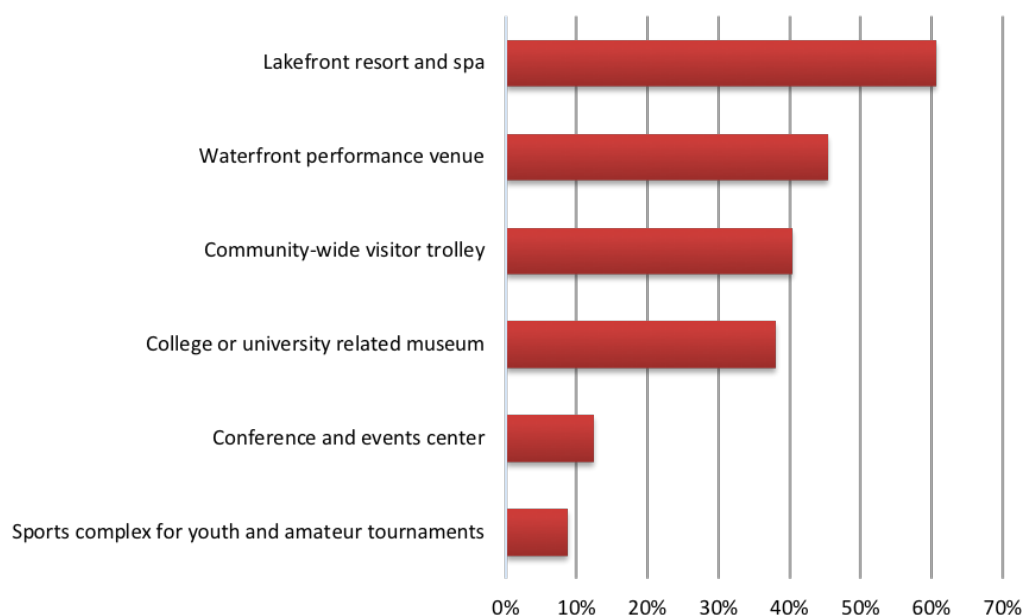
Included only within the digital survey.

Visitors were asked about additional items that would enhance the destination. The survey mechanism allowed respondents to select multiple enhancements. When asked what activities or experiences would create appeal if added to the Ithaca and Tompkins County destination product, over 60% selected a lakefront resort and spa.

The other three expressed enhancements selected by the respondents were “Waterfront performance venue” (selected by 44% of respondents), “Community-wide visitor trolley” (40%), “College or university related museum” (39%).

It should be noted that while “Conference and events center” (12%) and “Sports complex for youth and amateur tournaments” (9%) were each selected by a minimal number of respondents, specialized venues typically do not yield a high level of response to questions of needed venues by visitors. As this was not a meeting or sports planner survey, the level of responses on those respective products are not necessarily an indication of product needs. It is notable that conference and events center received the level of mention that it did and should provide a degree of additional study to determine feasibility.

Product Enhancements

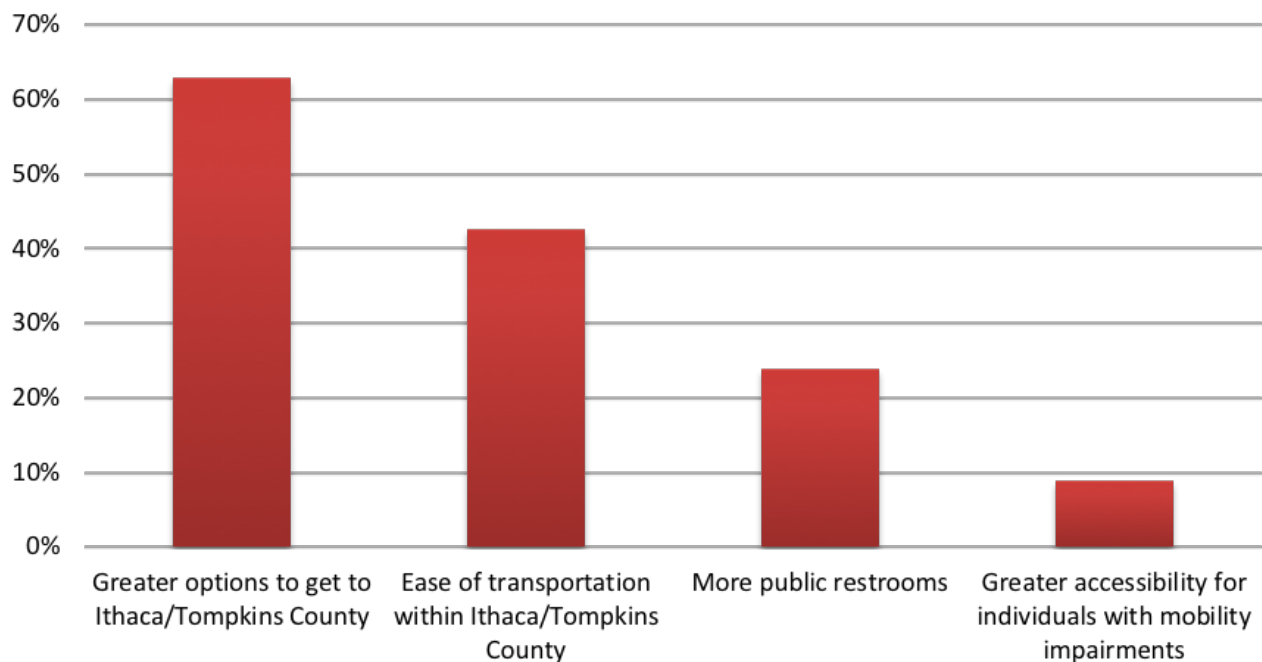


Visitor Feedback: Service Enhancements
Included only within the digital survey.

Visitors were asked about additional items that would enhance the destination from a services perspective. Transportation options to and within the destination received the highest level of response. As referenced previously within this profile report, over 70% of respondents arrived by car and less than 15% utilized taxis or rideshare services while in Ithaca and Tompkins County.

Respondents ranked transportation related items as the most important service enhancements needed for Ithaca and Tompkins County. Greater options to get to the destination was selected by over 60% while over 40% selected Ease of transportation within Ithaca and Tompkins County.

Service Enhancements



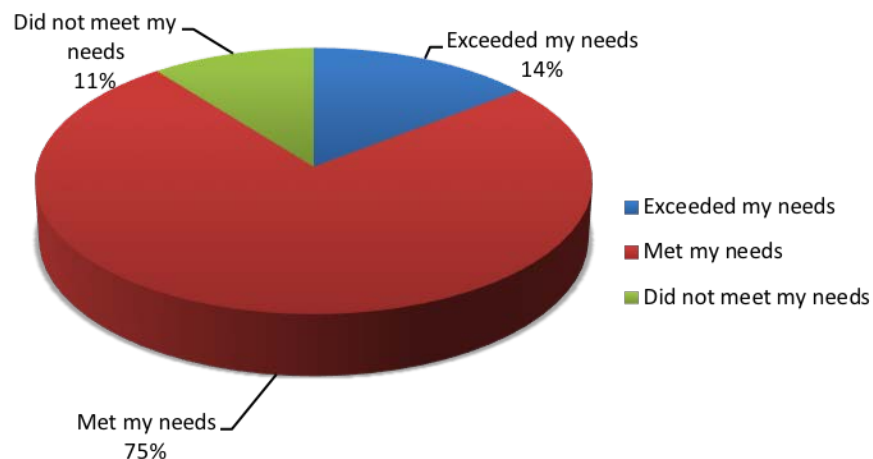
Visitor Feedback: Directional Signage

Included only within the intercept survey.

An important aspect of visitor experience within the destination is the ease of navigating the area through the aid of directional signage. Visitors were asked if the wayfinding and directional signage met their needs while in Ithaca and Tompkins County.

When combined, responses for “Exceeded my needs” and “Met my needs” achieved 89% of the responses. Only 11% selected “did not meet my needs.”

Did the wayfinding/signage meet your needs during this trip?

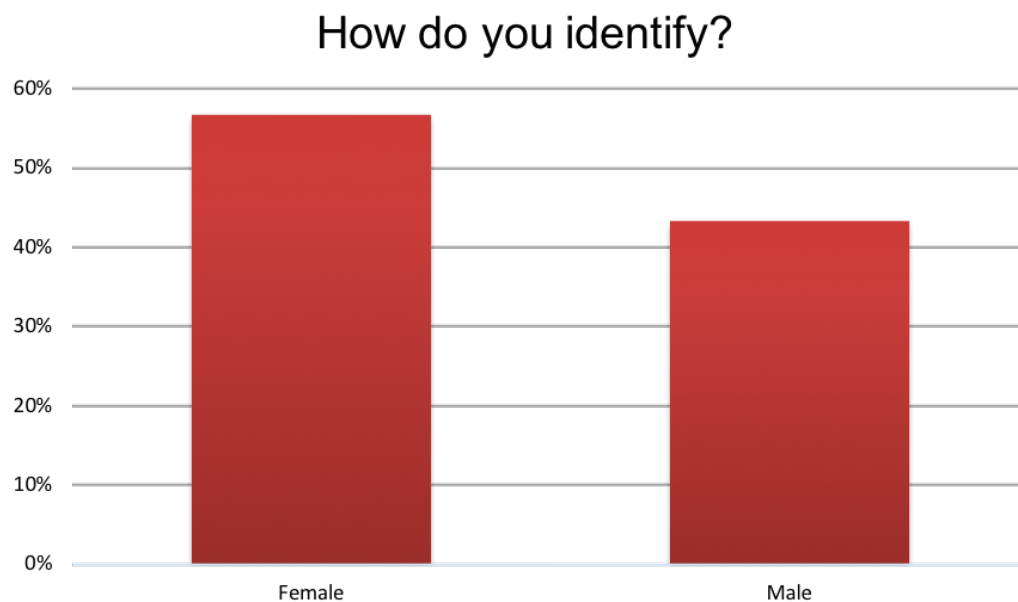
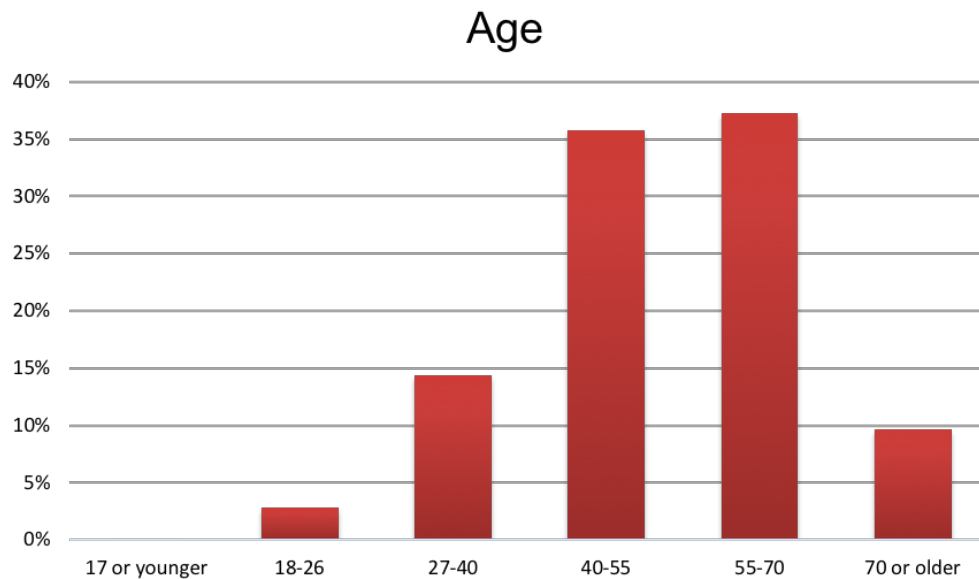


This exceptionally high score from respondents could be indicative of two trends. First, Ithaca and Tompkins County has a high number of repeat visitors (70%+) who are familiar with the destination. The more they visit, the less they feel that they need signage. Second, the prevalence of smart phone usage for directions makes visitors less reliant on destination directional signage.

There is potentially a remaining role for a wayfinding system to help direct visitors, both first timers and repeat, to learn of either new or different options for spending time in Ithaca and Tompkins County. Wayfinding can help with educating visitors that are relying on past knowledge of the area as one of their primary planning tools.

Respondent Demographics

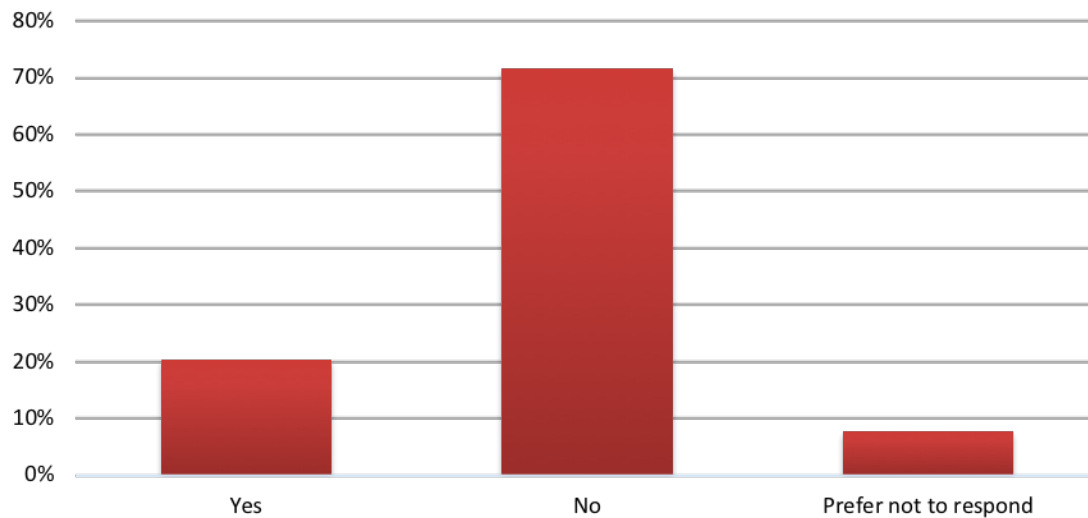
The majority of respondents are between 40-70 years of age with 57% of visitors being female.



Of visitors surveyed, 20% identified with the LGBTQIA+ community while another 8% Preferred to not respond.

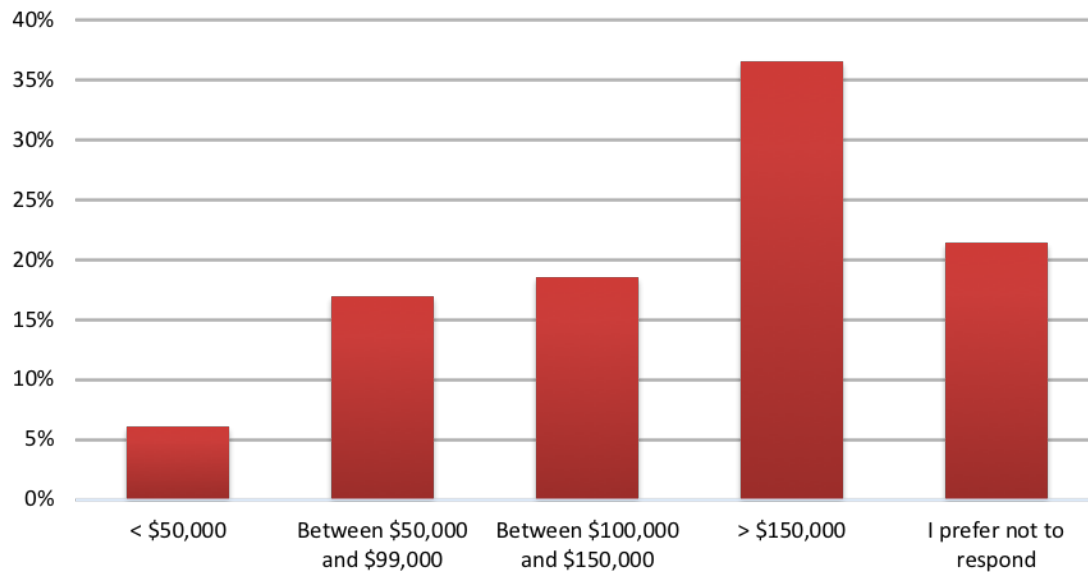
Compared with other destinations, the ratio of LGBTQIA+ connectivity for Ithaca and Tompkins County is a clear differentiator. This visitor group has a propensity to travel. The market focus on this visitor segment shows potential for greater growth in the future.

Do you identify with the LGBTQIA+ community?

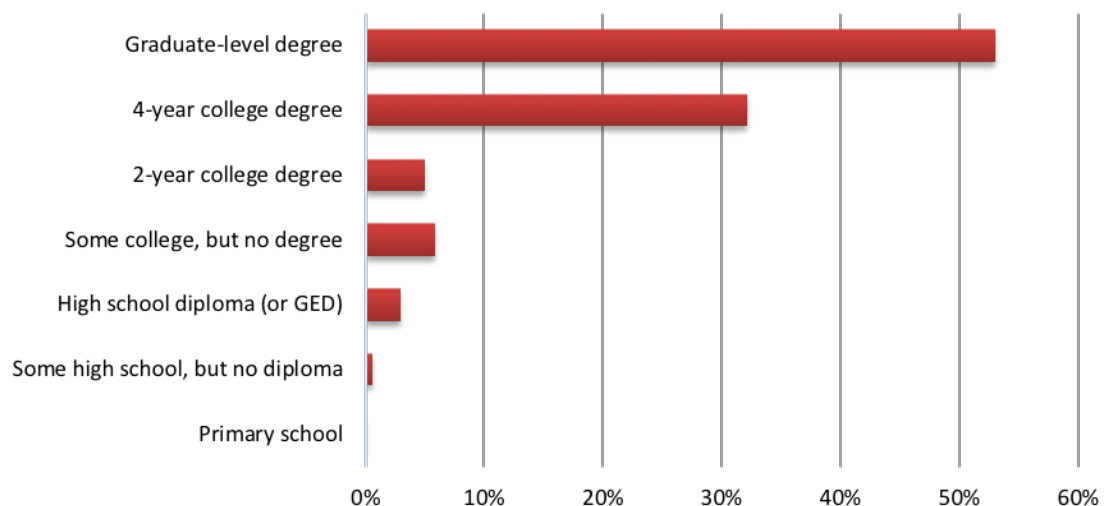


Visitors to Ithaca and Tompkins County are well educated (85% have college degrees), earn an above average household income (50% earn over \$100,000 per year) and are employed (62% working full time).

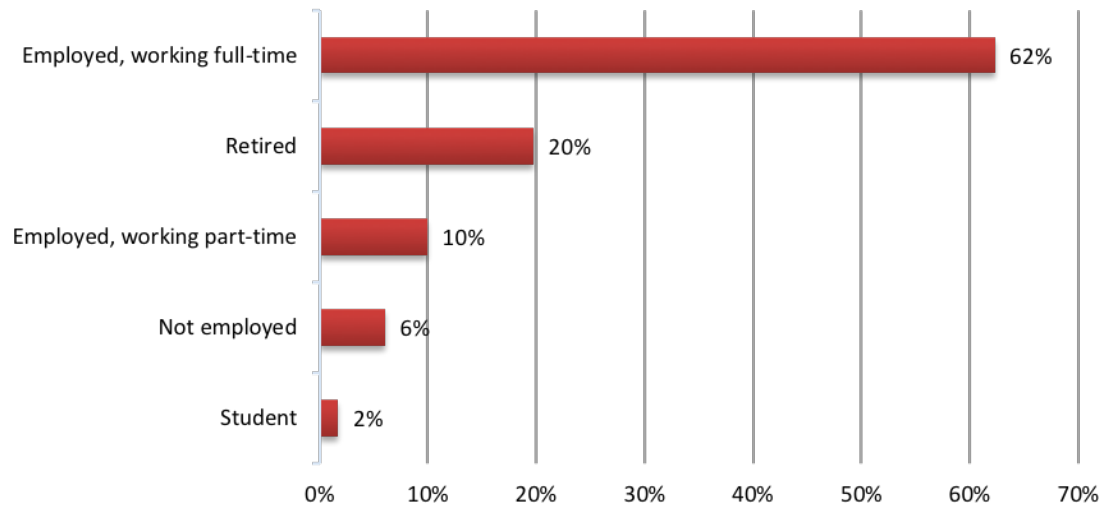
What is your annual household income?



What is the highest level of school that you have completed?



Which of the following categories best describes your employment status?





PRIMARY RESPONDENT VISITOR PROFILES

The following pages contain profiling overviews of the top visitor types for Ithaca and Tompkins County based on responses collected during both survey processes.

Families with Kids

The leading visitor type was a family with children, with 38% of all visitors responding that is how they traveled. To better understand those visitors traveling as a family into Ithaca and Tompkins County, the survey results were compiled and then analyzed focusing only on this type of visitor and their responses. The following is a profile of families with kids that visited Ithaca and Tompkins County. Families had the highest level of daytrips with only 67% staying overnight compared to other top profiles. However, Families staying in hotels spend the most on lodging and dining. Families spend the most on museums and attractions than any other top visitor profile. Families are more likely to visit in the summer with over 40% coming in that time of year.

- **Overnight stay**
 - 67% stay overnight.
 - 43% stayed for 2-3 nights
 - 20% stayed for one night
 - 15% stayed for 6 or more nights
- **Seasonality**
 - 41% visit in the summer
 - 23% visit in the spring
 - 20% visit in the fall
 - 15% visit in the winter
- **Accommodation Type**
 - 43% stayed in hotel/motels or inns
 - 23% stayed with family and friends
 - 22% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Spending (per day)**
 - \$233 – lodging
 - \$121 – dining
 - \$65 – retail
 - \$41 – transportation
 - \$38 – outdoor experiences
 - \$37 – craft beverages
 - \$18 – museums and attractions
 - \$34 – other entertainment
- **Primary Reason for Travel**
 - 24% visited for outdoor leisure and sightseeing
 - 20% visited for a college visit
 - 14% visited for friends and family
- **Satisfaction**
 - 76% - return in the next year
 - 90% - return in the future
 - 70% - recommend for vacation
 - 80% - recommend for getaway
- **Additional Activities**
 - 52% visit the gorges and waterfalls
 - 52% dine at restaurants
 - 39% hike local trails
- **Geographic Location**
 - 32% - New York State
 - 10% - Pennsylvania
 - 10% - New Jersey
 - 8% - California
- **LGBTQIA+ Identification**
 - 20% - yes
 - 69% - no
 - 10% - prefer not to respond

Families with Kids (College as Primary Reason for Travel)

The leading visitor type was a family with children with 38% of all visitors responding that is how they traveled. Within this visitor segment, 20% selected a higher education institution being the primary reason for travel. To better understand those visitors traveling as a family for higher education reasons in Ithaca and Tompkins County, the survey results were compiled and then analyzed focusing only on this type of visitor and their responses. The following is a profile of a family with kids traveling with the purpose of visiting colleges almost always stay overnight, but they are not staying very long with 42% staying for only one night. This segment spends the most on lodging at hotels, likely needing at least two rooms. **This segment is not experiencing as much of Ithaca and Tompkins County as other segments with the majority of their time in the destination being on campus or at restaurants.** However, they are spending the most on retail – likely connected to university purchases. This segment will visit during all times of year, but with the highest concentration of visits taking place in the spring and winter.

- **Overnight stay**
 - 89% stay overnight
 - 43% stayed for 2-3 nights
 - 42% stayed for 1 night
 - 7% stayed more than 6 nights
- **Accommodation Type**
 - 84% stayed in hotel/motels or inns
 - 7% stayed with family and friends
 - 7% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Additional Activities**
 - 67% dine at restaurants
 - 66% on-campus activities
 - 44% visit the gorges and waterfalls
- **Seasonality**
 - 38% visit in the spring
 - 25% visit in the winter
 - 21% visit in the summer
 - 16% visit in the fall
- **Spending (per day)**
 - \$256 – lodging
 - \$140 – dining
 - \$87 – retail
 - \$58 – transportation
 - \$38 – outdoor experiences
 - \$48 – craft beverages
 - \$22 – museums and attractions
 - \$48 – other entertainment
- **Satisfaction**
 - 77% - return in the next year
 - 93% - return in the future
 - 64% - recommend for vacation
 - 72% - recommend for getaway
- **Geographic Location**
 - 29% - New York State
 - 12% - New Jersey
 - 9% - California
 - 8% - Massachusetts
- **LGBTQIA+ Identification**
 - 17% - yes
 - 66% - no
 - 17% - prefer not to respond

Couples

The next highest visitor type were couples. To better understand those visitors traveling as couples into Ithaca and Tompkins County, the survey results were compiled and then analyzed focusing only on this type of visitor and their responses. Couples primarily stayed in hotels with a majority staying 2-3 nights. Couples are more likely to visit the craft beverage attractions including wineries, but the spend less than families and friends in this space. Couples are visiting primarily in the summer with the next highest season being fall. Couples are predominantly coming from New York State, but have additional geographic opportunities in New Jersey, Pennsylvania and Connecticut. This audience could be a target for market expansion.

- **Overnight stay**
 - 67% stay overnight.
 - 51% stayed for 2-3 nights
 - 14% stayed for 1 night
 - 18% stayed for 4-5 or more nights
- **Seasonality**
 - 38% visit in the summer
 - 27% visit in the fall
 - 21% visit in the spring
 - 14% visit in the winter
- **Accommodation Type**
 - 55% stayed in hotel/motels or inns
 - 13% stayed with family and friends
 - 15% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Spending (per day)**
 - \$171 – lodging
 - \$131 – dining
 - \$35 – retail
 - \$13 – transportation
 - \$15 – outdoor experiences
 - \$21 – craft beverages
 - \$5 – museums and attractions
 - \$9 – other entertainment
- **Primary Reason for Travel**
 - 23% visited for outdoor leisure and sightseeing
 - 12% visited for friends and family
 - 11% just to get away
- **Satisfaction**
 - 80% - return in the next year
 - 94% - return in the future
 - 73% - recommend for vacation
 - 82% - recommend for getaway
- **Additional Activities**
 - 65% dine at restaurants
 - 56% visit the gorges and waterfalls
 - 42% hike local trails
 - 41% visit local wineries, breweries and ciderie
 - 38% visit Ithaca Commons
- **Geographic Location**
 - 39% - New York State
 - 10% - Pennsylvania
 - 8% - New Jersey
 - 6% - Connecticut
- **LGBTQIA+ Identification**
 - 17% - yes
 - 77% - no
 - 6% - prefer not to respond

Friends

The fourth most prevalent visitor type was groups of friends traveling together with just under 10% of surveyed respondents. To better understand those visitors traveling friends into Ithaca and Tompkins County, the survey results were compiled and then analyzed focusing only on this type of visitor. Friends are more likely to stay in a homeshare property than the other top visitor profiles. This could be attributable to a cost-effective nature of splitting a home, amenities of being able to cook, etc. Friends are also more likely to visit Ithaca Commons than other top visitor profiles and have the second highest spending on retail behind college bound families. Groups of friends are also more likely to travel in the shoulder periods with over 30% visiting in the fall. Groups of friends are predominantly coming from New York State, but have the lowest representation from New Jersey than other top profiles. There is an opportunity to target the New Jersey market for future business expansion.

- **Overnight stay**
 - 75% stay overnight.
 - 56% stayed for 2-3 nights
 - 18% stayed for 1 night
 - 11% stayed more than 6 nights
- **Accommodation Type**
 - 50% stayed in hotel/motels or inns
 - 30% stayed in an Airbnb/VRBO/Homeaway or other home share platform
 - 9% stayed with family and friends
- **Primary Reason for Travel**
 - 23% visited for outdoor leisure and sightseeing
 - 10% visited for friends and family
 - 8% for a special event or festival
- **Additional Activities**
 - 60% dine at restaurants
 - 53% visit the gorges and waterfalls
 - 51% visit Ithaca Commons
 - 51% relax
 - 47% hike a local trail
- **Seasonality**
 - 31% visit in the fall
- 27% visit in the summer
- 27% visit in the spring
- 14% visit in the winter
- **Spending (per day)**
 - \$127 – lodging
 - \$75 – dining
 - \$71 – retail
 - \$46 – transportation
 - \$17 – outdoor experiences
 - \$48 – craft beverages
 - \$8 – museums and attractions
 - \$25 – other entertainment
- **Satisfaction**
 - 84% - return in the next year
 - 100% - return in the future
 - 71% - recommend for vacation
 - 90% - recommend for getaway
- **Geographic Location**
 - 39% - New York State
 - 10% - Pennsylvania
 - 6% - New Jersey
 - 6% - Texas
- **LGBTQIA+ Identification**
 - 24% - yes
 - 76% - no

CONCLUSIONS

Deep analysis and comparison with both past research results and current market trends provides an opportunity to draw certain strategic conclusions. These conclusions help create a base foundation for ongoing strategic direction. The conclusions are provided below.

The overnight visitor market for Ithaca and Tompkins County is highly dependent upon short-term travel of less than three nights. Efforts can be taken to attempt to grow length of stay, but the market reality of the short length of stay should not be viewed as a market weakness. Knowing that the Ithaca and Tompkins County travel product is blended well for overnight stays between one and three nights can help the destination stay focused on its strengths.

The emergence of homesharing options appears to have had more impact on stays with friends and family than traditional hotels/motels and inns as overnight stays with family and friends dropped from 31% in 2009 to approximately 15% in 2019. Impacts from homesharing stays and the associated affordability of their inventory options has likely impacted overall spending. As the homesharing stock in the destination increased over the last 10 years, that inventory captured visitors who previously would have stayed with friends and family. This capture of spending on accommodations benefits the destination through added tax collections.

The high volume (76% of respondents) of repeat visitors and their associated reliance (42%) on prior knowledge of the destination intensifies the need for educating local residents on visitor-related amenities to help empower them as local ambassadors. Emphasizing new options will be an important task for visitor center staff and frontline hospitality employees. Since these repeat visitors are more difficult to reach with marketing messaging, communicating to them while they are in-market to capture their spending in new and different ways could be an outcome from this effort. Options include strategically placed visitor services, referral training of frontline hospitality employees and wayfinding options.

The 2019 results indicate that Tompkins County is becoming a more balanced year-round destination. Efforts over the last 10 years to push visitation into slow-season and shoulder-season periods have largely shown success, based on the responses to this visitor profile study. Continued focus on developing off-peak business will remain important moving forward.

Of the detailed motivators, there are three that show opportunities for direct engagement through Visit Ithaca marketing and outreach, Sightseeing (8% of respondents), Leisure outdoor-oriented experience (8%) and Just to get away (6%). These categories as sub-sets of a general leisure experience provide definite opportunities for new strategies and tactics to reach visitors and cause new and increased visitation.

Additionally, 20% of those visiting a higher education institution were touring unrelated to a college tour. This a unique attribute of the higher education institutions and speaks to the beauty and intrigue of the campus experience in Tompkins County. This is another potential area of furthered partnership with Visit Ithaca and the higher education institutions to engage in strategy planning to promote new and increased visitation because of these unique attributes.

While respondents were asked to identify products that would enhance the Ithaca and Tompkins County experience, the results are not definitive of what is needed and function more as indicators of areas that should be further vetted. To fully determine the product gaps and potential assets for new investment and development a product demand study could be conducted or this could be a component of a larger Destination Master Planning initiative.

Ithaca and Tompkins County leaves a positive impression on visitors with an overwhelming majority identifying with the positive aspects of the destination. Further, over 90% stated they would return.

These outcomes all provide a strong platform for future planning around marketing investments for Visit Ithaca to further the destination's awareness and capture an increased market share of specific visitor types.

Appendix

- Online survey – all results (Excel)
- Intercept survey – all results (Excel)
- Top Profiles
 - Online survey – Families with Kids (Excel)
 - Intercept survey – Families with Kids (Excel)
 - Online survey – Couples (Excel)
 - Intercept survey – Couples (Excel)
 - Online Survey – Friends (Excel)
 - Intercept Survey – Friends (Excel)
- Discovery Trail – all results
- Cayuga Waterfront Trail – all results
- Comparison of spending changes from 2009-2010 survey (table)



Visitor Profile Report

Ithaca and Tompkins County



August 21, 2019



Overview

Background

Visit Ithaca and the Tompkins County Tourism Program engaged JLL to conduct an in-depth analysis of the destination's overnight visitors. This visitor profile study was conducted over the course of 18 months, from January 2018 to July 2019, and was comprised of comprehensive primary research.

Goals & Objectives

The purpose of conducting this Visitor Profile research was to:

- Provide insight related to overnight visitors coming to Ithaca and Tompkins County,
- Augment data gathered during the 2009-2010 Profile of Visitors to Tompkins County, and
- Provide observations on changes in visitor trends.

Prospective Outcomes

With this new information, Ithaca and Tompkins County Tourism Program leaders will be able to:

- Make more informed decisions on destination marketing and product development investment opportunities,
- Guide efforts to increase the destination's competitive position in the marketplace,
- Increase future visitor spending into the community, and
- Inform decisions needed for updating the overall strategic plan for the destination.



Methodology

2019 Overnight Visitor Profile – 2,070 total combined responses		2009 Overnight Visitor Profile
Digital email survey	Intercept Interviews	Intercept Interviews
Past visitors with completed trip	Visitors during trip	Visitors towards end of trip
Email lists from 2015, 2016 & 2017	Encountered at selected sites	Encountered at selected sites
Visit Ithaca inquiries, Hotels, Inns, Discovery Trail partners, retail partners, and other stakeholders	Parks, Universities, Downtown, Discovery Trail sites, Cayuga Waterfront Trail sites, Farmer's Market, Lodging providers, Events/Entertainment, Airport, and Breweries/Wineries	Hotel/Lodging, Downtown, Parks, Universities, and Other
Surveying from March-May 2018	Interviews from July 2018 – July 2019*	Interviews from 12/08 – 11/09
1,400 completed surveys	670 completed interviews	1,503 completed interviews

JLL would like to acknowledge and thank the Visit Ithaca staff and the Ithaca Tompkins County Client Committee for the guidance and connections provided to ensure that critical visitor locations were included.

**Locations were adapted throughout the process to accommodate weather constraints and underperforming locations for overnight visitation.*



3

Number of individuals encountered
|
Number of surveys collected from overnight travelers

Monthly Intercept Activity	July – September	October - December	January - March	April - June	Total
Buttermilk Falls State Park (OUTDOORS)	120 21	60 8	80 8	20 4	41
Taughannock Falls State Park (OUTDOORS)	80 14	140 16	80 6	100 12	48
Ithaca Falls (OUTDOORS)	100 19	60 7	40 0	60 1	27
Robert Treman State Park (OUTDOORS)	100 14	80 4	40 2	140 7	27
Cornell Univ. (COLLEGE)	120 26	120 3	40 6	140 9	44
Ithaca College (COLLEGE)	100 9	160 11	160 11	60 2	33
Ithaca Commons (DOWNTOWN)	220 23	140 12	100 7	40 5	47
Restaurant Row (DOWNTOWN)	120 9	260 9	120 11	100 6	35
Sciencenter (DISCOVERY TRAIL)	100 12	140 13	120 6	160 10	41
Museum of the Earth (DISCOVERY TRAIL)	80 8	80 10	40 4	160 8	30
Cayuga Nature Center (DISCOVERY TRAIL)	60 2	60 1	200 1	120 12	16
TC Public Library (DISCOVERY TRAIL)	80 1	100 0	100 5	180 14	20
Cornell Lab of Ornithology (DISCOVERY TRAIL)	60 16	60 15	N/A	180 8	39
The History Center (DISCOVERY TRAIL)	60 2	60 7	N/A	80 3	12
Cornell Botanic Gardens (DISCOVERY TRAIL)	100 20	60 2	40 1	60 7	30
Johnson Museum of Art (DISCOVERY TRAIL)	60 8	80 11	100 7	220 25	51
Cayuga Waterfront Trail/Cass Park	140 13	120 1	200 1	220 10	25
Stewart Park	140 24	80 0	60 2	60 5	31
Steamboat Landing Farmer's Market	200 15	260 16		60 0	31
Hotels/Accommodations	120 7	60 3	120 13	440 35	58
Ithaca Airport	120 15	160 13	140 11	20 3	42
Beverage	220 22	140 15	120 5	40 0	42
Performance/Event	220 12	40 3	20 1	20 0	16



4

Methodology Comparisons

Comparison	2019 Overall Intercepts	2009 Overall Intercepts
Jan. - March	14%	14%
April - June	24%	24%
July - September	39%	43%
October - December	23%	19%

Hotel/Lodging*	7%	29%
Downtown*	10%	20%
Parks*	18%	17%
University/College*	10%	16%
Other*	13%	18%
Discovery Trail	30%	
Cayuga Waterfront Trail	11%	



*Using 2009 Aggregate Survey Locations

5

Notables

- The overall response rate from Overnight Visitors in 2019 was 38% higher than the 2009-2010 study
- The 2009-2010 study provided an additional 223 resident telephone surveys and 101 student surveys. The relatively low response rate of these two separate audiences prompted weighting of their impact within the final results.
- The 670 responses derived from the intercept interview was sufficiently high enough to not require additional weighting in the interpretation of the results. In comparing the overall results from both the digital and the intercept approaches, nearly every question yielded similar results with a few noted exceptions. For these reasons, the 2019 results were directly consolidated into a blended compilation that serves as the best glimpse of overall visitor activity.
- The insights gleaned from the survey results will support Visit Ithaca and the Tompkins County Tourism Program's destination marketing and product development efforts for future years to come.



6

Executive Summary

Highlight Results - 2019

- Repeat visitation to Ithaca and Tompkins County is high with 76% having visited on a previous occasion.
- Based on the overall survey results, 78% of the respondents reported staying overnight and 22% identify as day trippers
- Visitors spend approximately \$366 per day while in Ithaca and Tompkins County
- Travel party size has increased to 3.3 people per trip
- Overnight visitors are staying primarily between 2-3 nights
- Overnight visitors are largely staying in hotels/motels or inns (over 60% of results)
- Same day travel planning showed the most significant shift changing from 15% of respondents in 2009 to 2% in 2019
- Summer led the seasons with over 30% of the visits followed by a nearly even split between Spring and Fall, each at 26%.
- Visitors are primarily traveling as a family with children or as couples
- The primary reason visitors are traveling is to engage in the outdoor leisure activities
- Visitors engage in the unique dining offerings, outdoors, shopping and events when they come to the destination
- Higher education brings visitors into the destination for more than campus activities
- Visitors are highly satisfied with the experience as over 80% of respondents state they will return



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Executive Summary

Comparison of Highlights	2019 Overall Results	2009 Overall Results
Repeat Visitation	76% repeat	69%
Overnight Percentage	78% staying overnight	63%
Spending	\$366 per party per day	\$331
Travel Party Size	3.3 people	3.0
Nights Spent	2-3 nights	2.4
Mode of Transportation	21% air	10%
Stays in Hotel/Motels/Inns	60%	50%
Same day Travel Planning	2%	15%
Primary Reason for Travel	Outdoor Leisure Activities	Gorges & State Parks*
Visitor Satisfaction	80% will return	81%

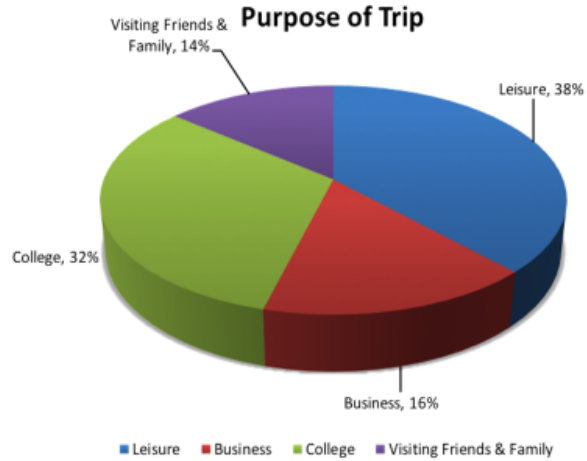
*Rankings did not include university- or college-related travelers



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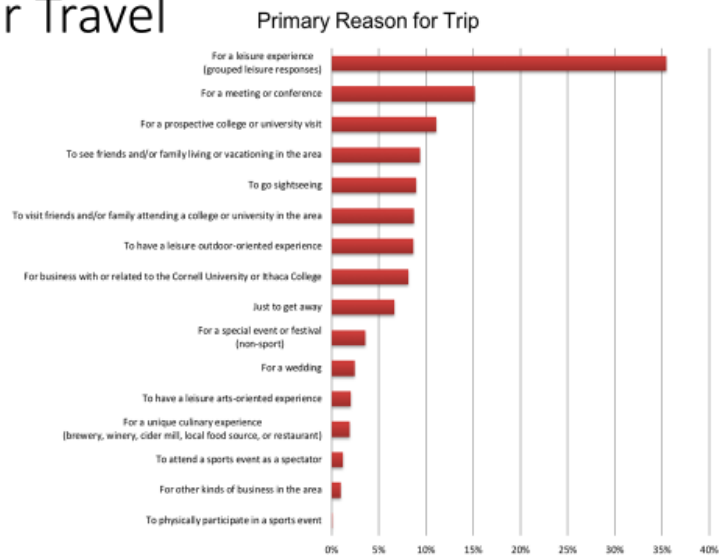
Primary Reason for Travel

- The 2019 visitor profile methodology sought to provide needed detail on the true reasons that prompted the trip to Ithaca and Tompkins County.
- Those responses were clustered into traditional broader categories that included leisure related reasons (38% of response), college related reasons (32%), business related reasons (15%) and friends/family reasons (14%).



Primary Reason for Travel

- There are three detailed motivators that offer opportunities for direct engagement with Visit Ithaca marketing and outreach:
 - Sightseeing - 8%
 - Leisure outdoor-oriented experience - 8%
 - Just to get away - 6%
- These categories as sub-sets of a general leisure experience provide definite opportunities for focused, strategic pursuit and resource investment



Primary Reason for Travel: Higher Education

- 32% of the respondents indicated that their primary purpose for visiting Ithaca and Tompkins County related to higher education
- More than one third of those visitors (35%) were primarily in the area to visit a student.
- College tours and on-campus events accounted for 26% and 25% of higher education reasons respectively.
- Cornell University represented 96% of the survey respondents' selections for which higher education institution they visited.
- Additionally, 20% of those visiting a higher education institution were touring unrelated to a prospective collegiate commitment. *This unique attribute speaks to the desirability of a non-traditional campus experience in Tompkins County.*
- Meeting or conference participation is notable at 12% given that Ithaca and Tompkins County does not have a dedicated conference center.

Higher Education Participation	
Visiting a student	35%
College tour	26%
On-campus event	25%
Tour (sightseeing on campus not related to a college tour)	20%
Attend a class, course, training or workshop	13%
Meeting or conference	12%
Alumni event	7%
Sports (spectator)	4%
Academic camp	4%
Sports (participatory including camps)	2%
Certification of a specific license or designation	0%



Length of Stay

- The majority of overnight respondents reported staying 2-3 nights.
- Just over 24% of the total responses stated one night as the length of stay.
- A combined 65% of overnights fell between one and three nights to define Ithaca and Tompkins County's position as a short getaway destination.
- Ithaca and Tompkins County maintains some specific market opportunity with extended stays (over 5 nights) as 15% of combined respondents.

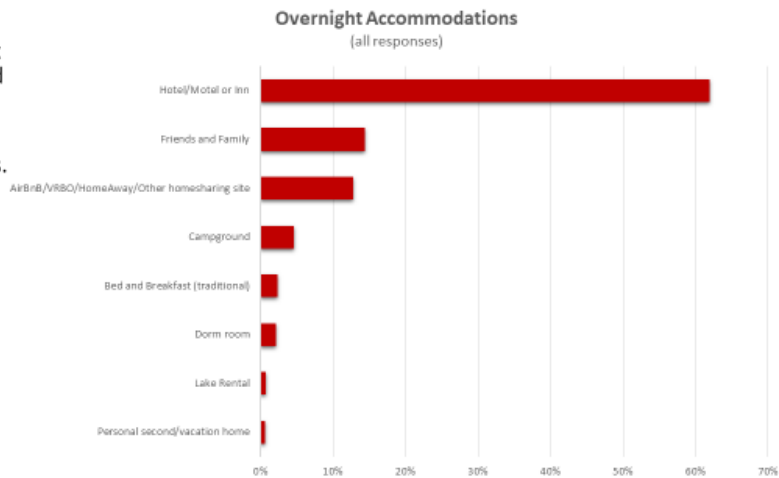
Length of Stay			
Intercept		Online	
1 night	23%	1 night	26%
2-3 nights	45%	2-3 nights	35%
		3-4 nights	18%
4-5 nights	11%	4-5 nights	7%
5-6 nights	8%		
6+ nights	10%		
		5-10 nights	10%
		10+ nights	2%

Based on the overall survey results, 78% of the respondents reported staying overnight and 22% identify as day trippers.



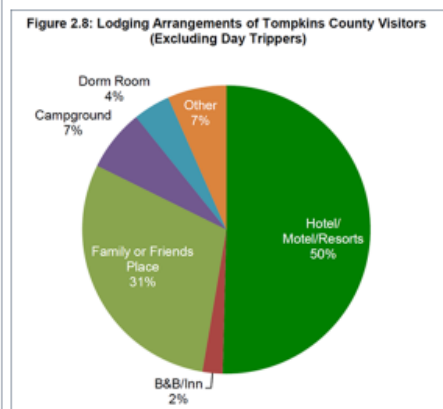
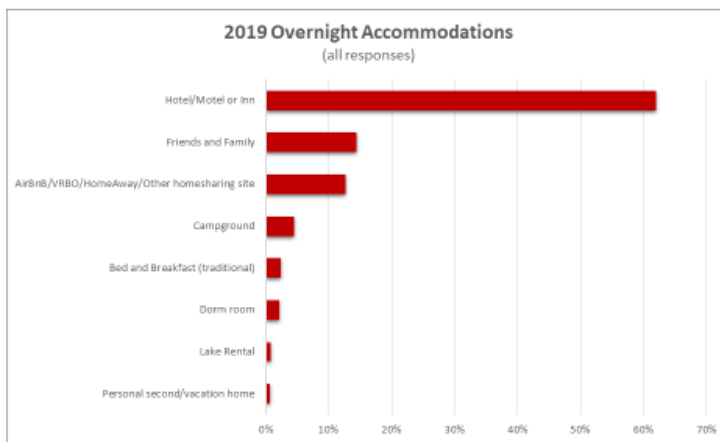
Overnight Visitors: Types of Accommodations

- When asked about their accommodations for their overnight stays, 63% of all respondents stayed in a hotel/motel or inn.
- Visitors staying with friends and family account for 13% of all visitors.
- The home sharing platforms of Airbnb/VRBO/HomeAway and other similar services account for another 12% of all visitors staying overnight.



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Overnight Accommodations Compared



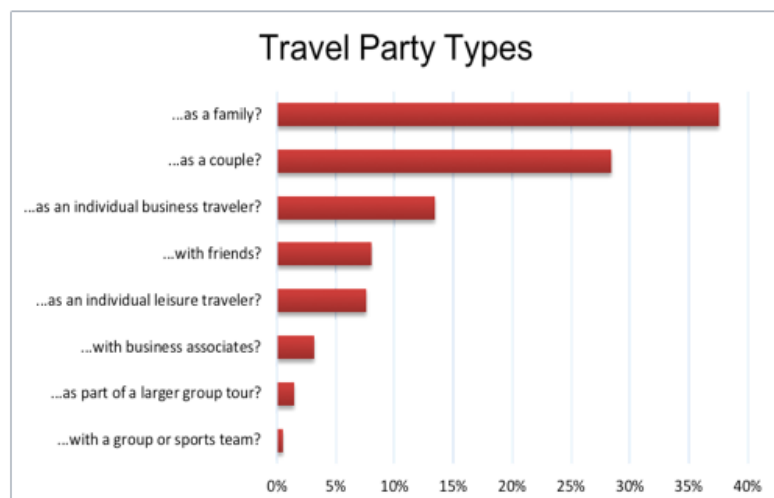
14

Overnight Accommodations Notables

- In 2009, the small incidents of home rentals were included in within an “Other” category that consisted of 7% of overall overnight accommodations responses.
- Homesharing appears to have impacted stays with family and friends in the most significant manner. This segment dropped from 31% of overnight stays in 2009 to approximately 15% in 2019.
- Hotel/Motel stays actually increased from 50% to nearly 62% of lodging utilized between 2009 and 2019.

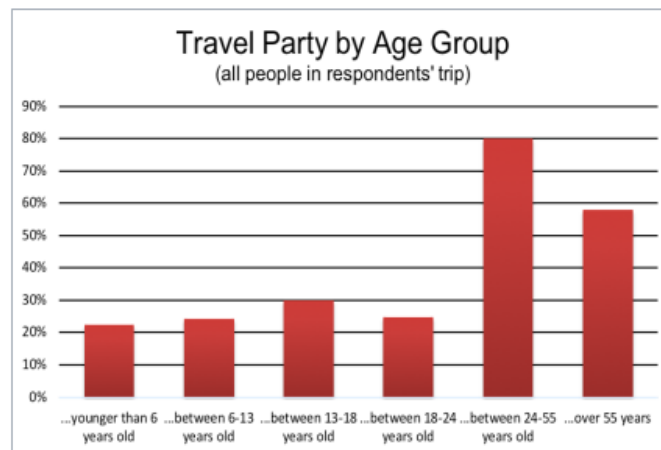
Travel Party Type

- The most prominent visitor party to Ithaca and Tompkins County were Families traveling with Children at 38% of all responses.



Travel Party by Age Group

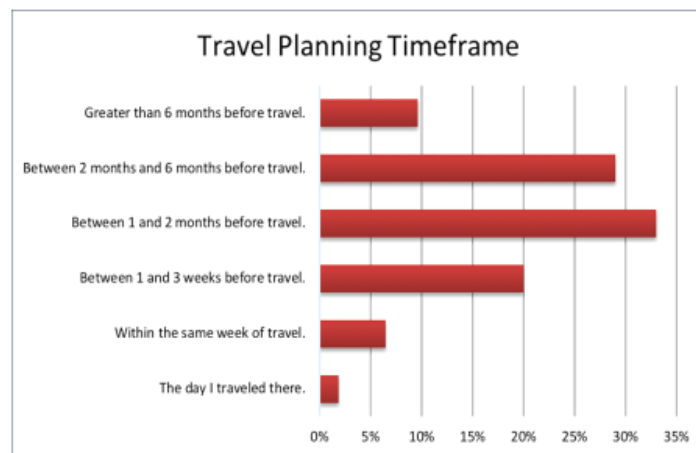
- The average travel party size was 3.3 people, slightly larger than the 3.0 people staying overnight garnered from the 2009 Visitor Profile.
- Adults accounted for 2.4 people of the travel party with children under 18 accounting for the remainder. Although children between 13-18 years of age represented the largest category of accompanying travelers, the difference between age groupings was largely nominal.



Note: This question sought out to understand the age variables of the travel party, particularly as related to accompanying children.

Travel Planning Timeframe

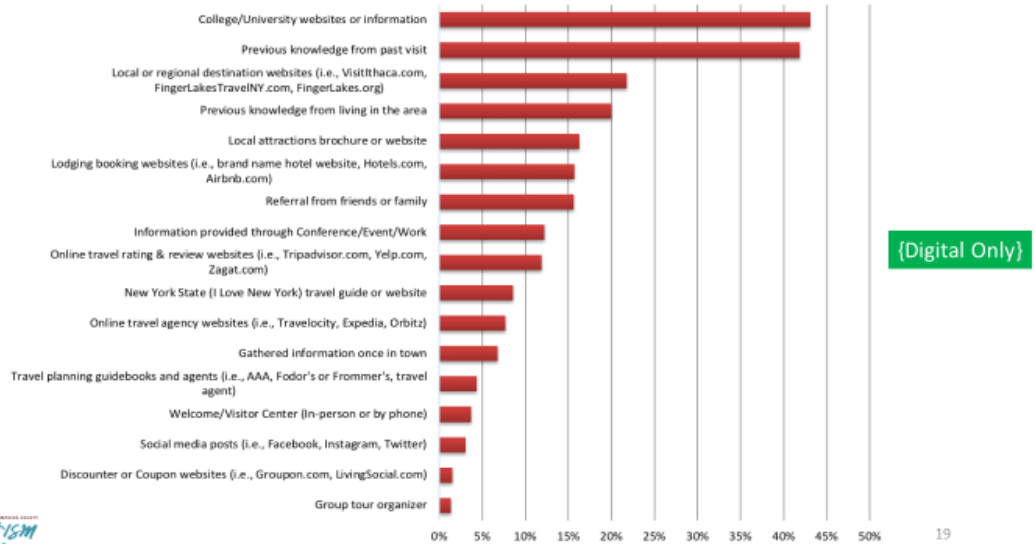
- The respondents largely planned their trip to Ithaca and Tompkins County between one and two months (33% of responses) prior to their trip. These results match well with the 2009 profile.
- Those respondents that indicated travel planning of less than one month, not including those deciding upon the day of travel went from 30% in 2009 to 26% in 2019.
- Same day travel planning showed the most significant shift changing from 15% to 2%. This could be attributed to the 2019 methodology of reaching a broader audience of actual visitors compared to the 2009 results which focused only on intercept surveys at specific locations within the County.



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Travel Planning Resources

Travel Planning Resources



Travel Planning Resources

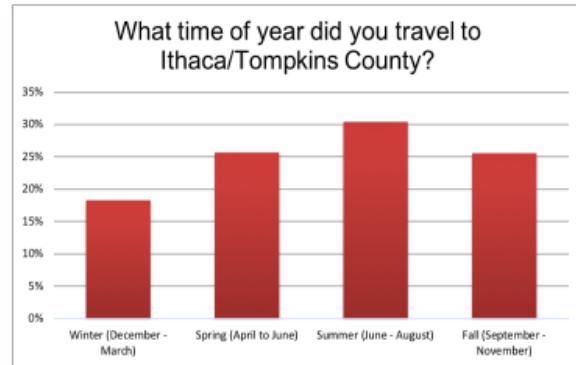
- Visitors used multiple sources of information to plan their trip.
- Many visitors are utilizing higher education websites (43%), regardless of whether they are visiting a higher education facility.
- Additionally, as 76% of visitors are repeat, many are relying on prior knowledge of the destination with 42% of all visitors selecting that option.
- The third most utilized resource is local or regional destination websites (*visitors were shown these options: VisitIthaca.com, FingerLakesTravelNY.com, FingerLakes.org*) with 22% of all visitors using online destination resources.
- The "Internet" was cited in 2009 as the most prominent planning tool. "University resources" only accounted for 3% of the information resources.



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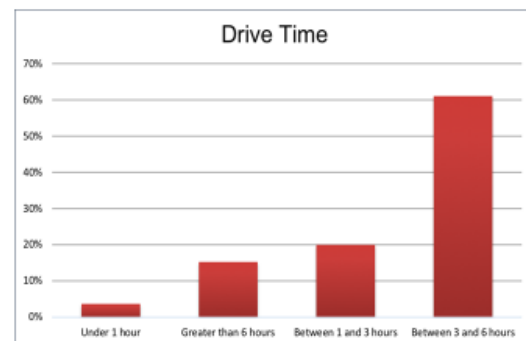
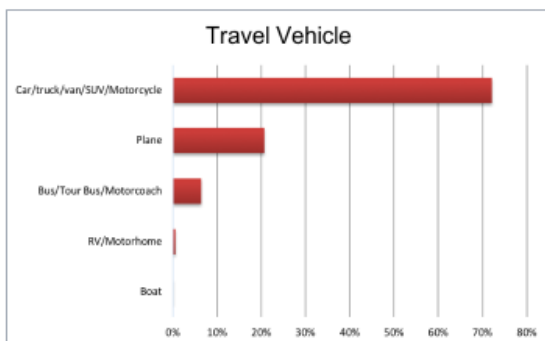
Seasonality

- Over 80% of respondents indicated having visited Ithaca and Tompkins County from April to November (Spring, Summer and Fall).
- Summer led the seasons with over 30% of the visits followed by a nearly even split between Spring and Fall, each at 26%.
- This seasonality marks a significant shift from the 2009 profile where the combined months of July and August captured 30% of the total seasonal visitation volume.
- The 2019 results indicate that Tompkins County is becoming a more balanced year-round destination. The peaked bell curve of seasonal visitation shown in the 2009 profile has dramatically flattened within the 2019 study, showing that the 10-year trend has successfully pushed visitation into shoulder periods.
- Additional comparisons of seasonality to overnight lodging performance patterns needs to be explored more deeply through secondary data sources and Tompkins County room tax collections trends.



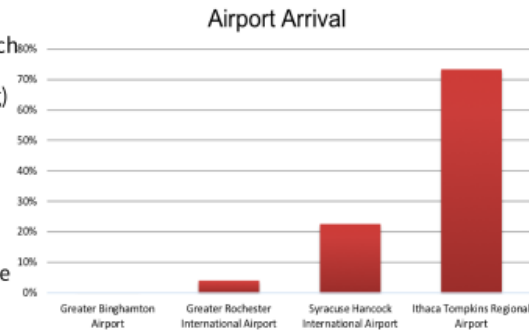
Travel by Arrival Type

- Respondents were over three times more likely to arrive in Ithaca and Tompkins County by automobile than any other mode of transportation.
- The 72% of respondents that drove to the destination typically (60%) traveled between 3 and 6 hours for their overnight stay.



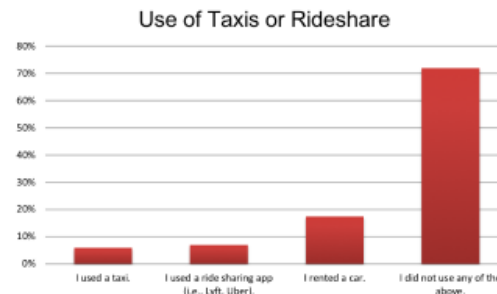
Travel by Arrival Type

- Air travel to Ithaca and Tompkins County showed significant growth from the 2009 results as those respondents indicating that they flew in grew from 14% to 20%. This change could be reflective of the 2019 methodology to reach more visitors via online database surveying and intercepts on site at the airport. (intercept versus database surveying) but it is notable.
- Visitation tracking of enplanements and deplanements in airports servicing the area should be examined for overall presumptions of true travel patterns.
- Of those respondents who arrive by plane (21%), over 73% arrive into Ithaca Tompkins Regional Airport and 23% arrive into Syracuse Hancock International Airport.

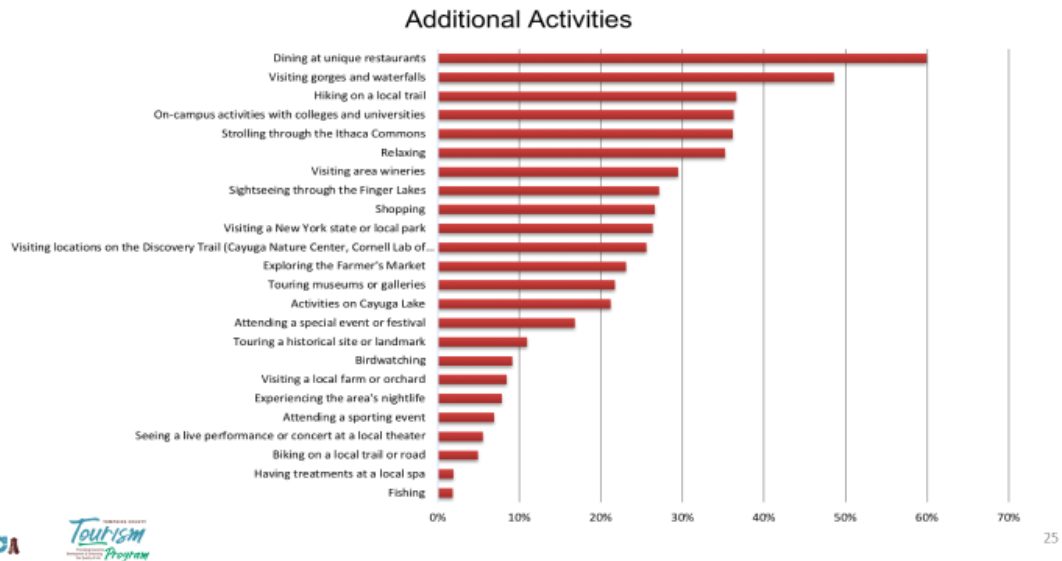


Travel within the Destination

- As the majority of visitors are arriving by vehicle, **over 70% of the overall respondents indicate that they do not utilize other transportation** while they are in the destination.
- Less than 15% of respondents indicated using either a rideshare app or taxi while traveling within the area.
- Conclusions on alternative modes of transportation cannot be derived without further surveying on visitor usage. This includes local shuttles, scooters, bikes, walking and public buses.

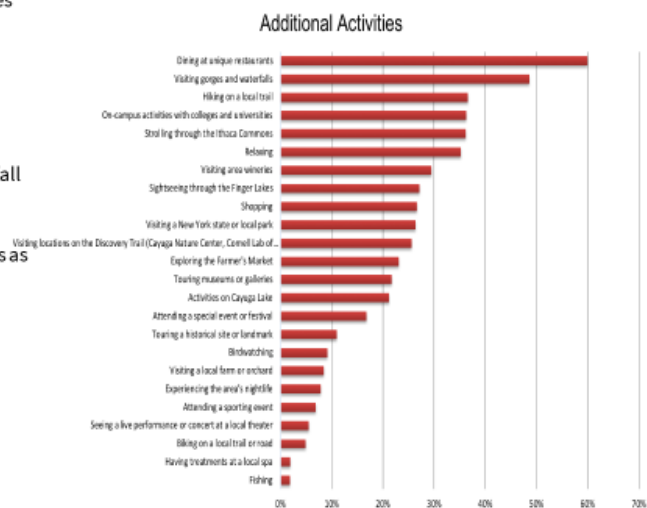


Additional Activities



Additional Activities

- Nearly 50% of all respondents selected “Visiting gorges and waterfalls”.
- 36% selected “Hiking on local trails” as the next most prominent visitor activities.
- “On-campus activities with colleges and universities” were also selected by 36% of respondents.
- “Strolling through Ithaca Commons” and “Relaxing” fall into this top tier grouping of most selected activities.
- Regional sightseeing and shopping related options provided a secondary grouping of additional activities as respondents indicated their participation in:
 - Visiting area wineries - 29%
 - Sightseeing through the Finger Lakes - 27%
 - Shopping - 26%
 - Visiting a New York State or local park - 26%
 - Visiting locations on the Discovery Trail - 25%
 - Exploring the Ithaca Farmer’s Market - 23%
 - Touring museums or galleries - 22%
 - Activities on Cayuga Lake - 21%



Additional Activities: Area Park Visitation

- Of all visitors surveyed, 53% visited parks in the area.
- Of the 53% that visited parks, 74% of these respondents reported visiting more than one park.
- Of the parks visited, Taughannock Falls State Park and Buttermilk Falls State Park had the highest visitation at 32% and 27% respectively.
- Ithaca Falls is the third most visited with 23% of visitors surveyed selecting that option.

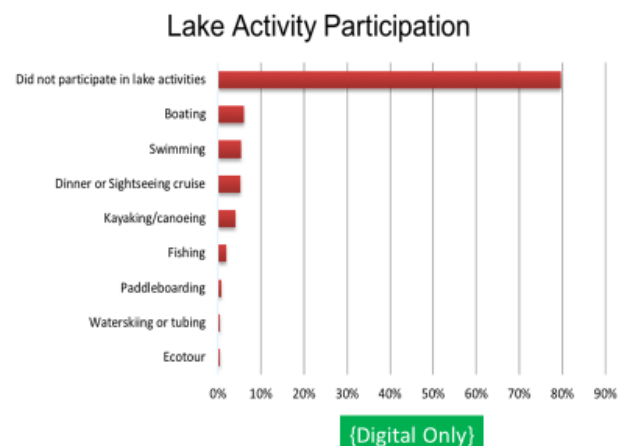


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Additional Activities: Lake Activities

- Just over 20% of all visitors surveyed stated they participated in activities on Cayuga Lake.
- Of the various Cayuga Lake activities provided within the detailed survey question, respondents indicated a greater level of participation in “Boating” (6%), “Swimming” (5%), and “Dinner or sightseeing cruises” (5%).
- Paddle sports (“kayaking/canoeing” and “paddleboarding”) represented a combined 6% of responses. “Fishing” represented 2% of the lake activity selections.
- When respondents provided open-ended comments to this question, many noted that while they did not participate in the activities offered, they simply enjoyed being lakeside.



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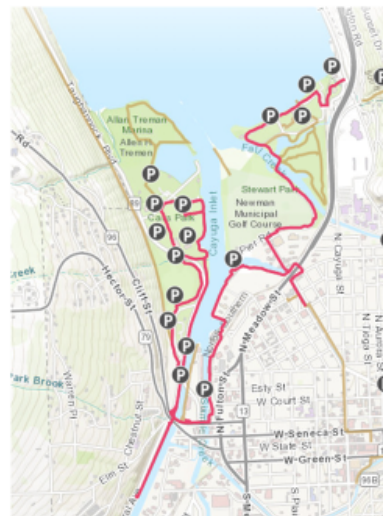
Additional Activities: Discovery Trail

- When asked if respondents had heard of the Discovery Trail, 32% stated that they had heard of the Discovery Trail and the attractions within it.
 - Additionally, the intercept portion of the survey collected responses from visitors at all of the Discovery Trail locations.
- Of those respondents that went to a museum or attraction on the Discovery Trail, 83% visited more than one of the sites.
- In similar comparison to parks, 50% of all respondents stated they did not visit any of the specific Discovery Trail member sites.
- The top three visited sites are all Cornell related, representing 70% of the Discovery Trail visitor engagement.



Additional Activities: Cayuga Waterfront Trail

- When asked if respondents had heard of the Cayuga Waterfront Trail, 41% stated that they had heard of the Cayuga Waterfront Trail and its various destinations.
- Although 41% is a relatively high level of awareness for a specific local travel experience, the question arises on whether this awareness is directly connected to name of Cayuga Lake compared to the actual trail sites.
- More direct research is recommended to understand the overall correlation.
- Additionally, the intercept portion of the survey collected responses from visitors at all of the Cayuga Waterfront Trail locations.



Positive Perception

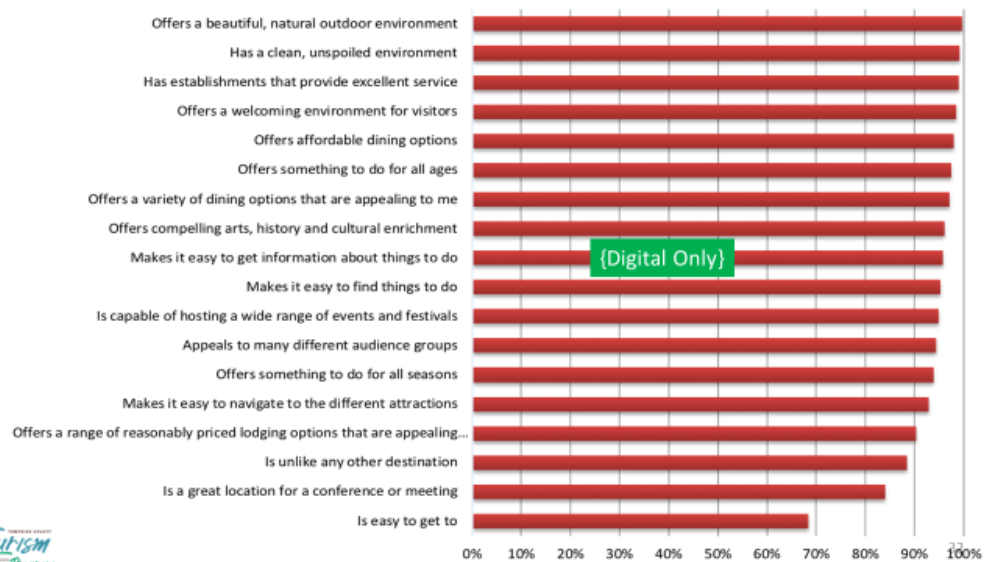
- Respondents expressed a highly positive impression of Ithaca and Tompkins County.
 - When asked how experiences in Ithaca and Tompkins County compare with other places they have visited, Ithaca and Tompkins County received four of five stars.
- These respondents were asked about their likelihood of returning to Ithaca and Tompkins County and **over 91% responded that they would return.**
- When asked if they would recommend the destination to friends and family, 68% said they would recommend Ithaca and Tompkins County for a vacation and 85% said they would recommend the destination for a getaway.

Return & Recommend			
Likelihood to Return (regardless of reason)		Likelihood to Recommend	
Yes	91%	For vacation (5-7 nights)	68%
No	9%	For a getaway (1-3 nights)	85%



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Visitor Feedback Alignment with Statements



Visitor Feedback

- Visitors were asked how Ithaca and Tompkins County aligns with a variety of destination related attributes and descriptions.
- Overall the destination received very high ratings, with all but one statement achieving over 80% feedback that the statements described Ithaca and Tompkins County “somewhat well” or “extremely well”.
- The lowest score in this set of statements was “Is easy to get to” with the combined scores achieving a 68% rating.
- “Is easy to get to” was not an option provided in the 2009 profile, but “Roads and Traffic” was the top aspect “not enjoyed”

Alignment with Statements



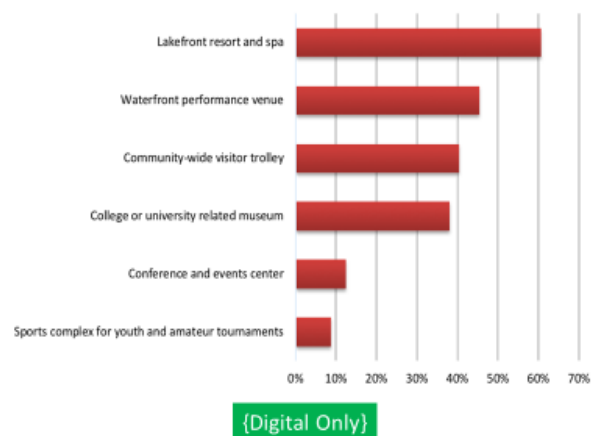
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Visitor Feedback: Product Enhancements

- When asked what activities or experiences would create appeal if added to the Ithaca and Tompkins County destination product, over 60% selected a lakefront resort and spa.
- The other three expressed enhancements selected by the respondents were “Waterfront performance venue” (selected by 44% of respondents), “Community-wide visitor trolley” (40%), “College or university related museum” (39%).
- It should be noted that while “Conference and events center” (12%) and “Sports complex for youth and amateur tournaments” (9%) were selected by a minimal number of respondents. Specialized venues typically do not yield a high level of response to questions of needed venues by visitors. As this was not a meeting or sports planner survey, the level of responses on those respective products is not necessarily an indication of product needs or opportunity.

Product Enhancements

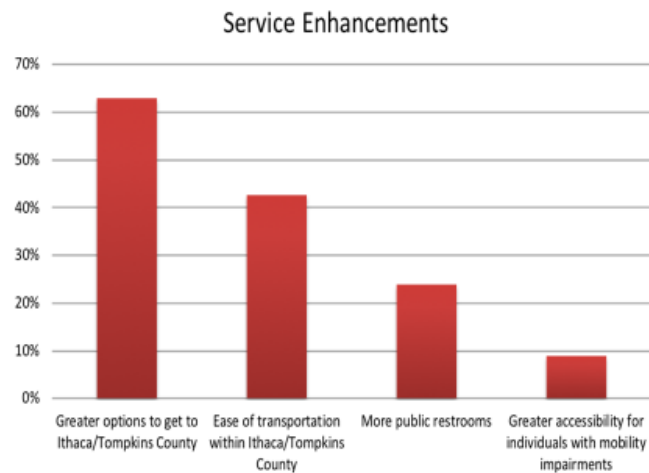


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Visitor Feedback: Service Enhancements

- Transportation options to and within the destination were the top respondent answers to Service Enhancements.
- Respondents ranked transportation related items as the most important service enhancements needed for Ithaca and Tompkins County. “Greater options to get to the destination” was selected by over 60% while over 40% selected “Ease of transportation within Ithaca and Tompkins County”.



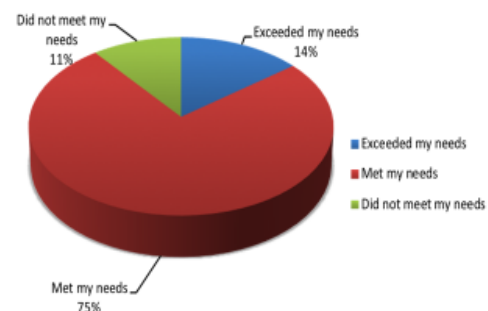
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Visitor Feedback: Directional Signage

- When combined, responses for “Exceeded my needs” and “Met my needs” achieved 89% of the responses.
- Only 11% selected “did not meet my needs.”
- This exceptionally high score from respondents could be indicative of two trends.
 - Ithaca and Tompkins County has a high number of repeat visitors (70%+) who are familiar with the destination.
 - The more they visit, the less they feel that they need signage.
 - The prevalence of smart phone usage for directions makes visitors less reliant on destination directional signage.

Did the wayfinding/signage meet your needs during this trip?

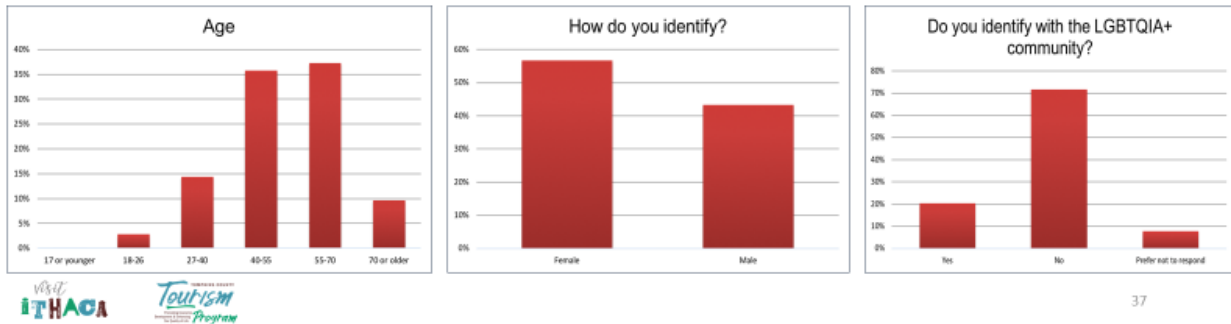


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Respondent Demographics

- The majority of respondents are between 40-70 years of age with 57% of visitors being female.
- Of visitors surveyed, 20% identified with the LGBTQIA+ community while another 8% Preferred to not respond.
 - Compared with other destinations, the ratio of LGBTQIA+ connectivity for Ithaca and Tompkins County is a clear differentiator.
 - This visitor group has a propensity to travel. The market focus on this visitor segment shows potential for greater growth in the future.

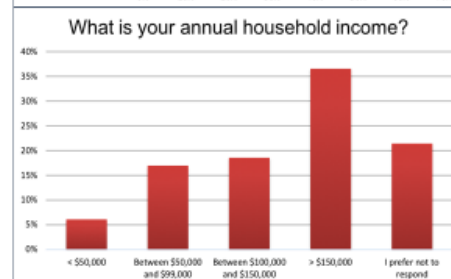
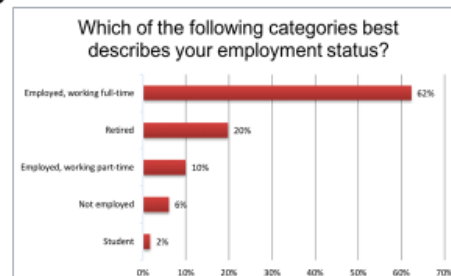
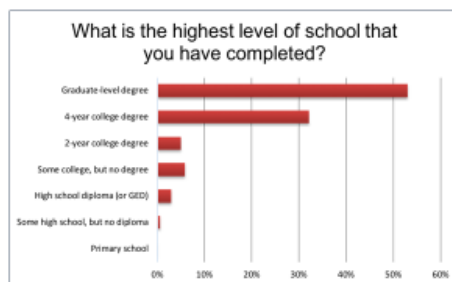


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Respondent Demographics

Visitors to Ithaca and Tompkins County are:

- Well educated – 80% college educated
- Employed – 62% working full time
- Earn an above average household income
 - 50% earn over \$100,000



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Visitor Profile: Families with Kids

The leading visitor type was a family with children (38% of all respondents). Families had the highest level of daytrips with only 67% staying overnight compared to other top profiles. However, Families staying in hotels spend the most on lodging and dining. Families spend the most on museums and attractions than any other top visitor profile. Families are more likely to visit in the summer with over 40% coming in that time of year.

- **Overnight stay**
 - 67% overall stay overnight
 - 43% stayed for 2-3 nights
 - 20% stayed for one night
 - 15% stayed for 6 or more nights
- **Accommodation Type**
 - 43% stayed in hotel/motels or inns
 - 23% stayed with family and friends
 - 22% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Primary Reason for Travel**
 - 24% visited for outdoor leisure and sightseeing
 - 20% visited for a college visit
 - 14% visited for friends and family
- **Additional Activities**
 - 52% visit the gorges and waterfalls
 - 52% dine at restaurants
 - 39% hike local trails
- **Seasonality**
 - 41% visit in the summer
 - 23% visit in the spring
 - 20% visit in the fall
 - 15% visit in the winter
- **Spending (per day)**
 - \$233 - lodging
 - \$121 - dining
 - \$65 - retail
 - \$41 - transportation
 - \$38 - outdoor experiences
 - \$37 - craft beverages
 - \$18 - museums and attractions
 - \$34 - other entertainment
- **Satisfaction**
 - 76% - return in the next year
 - 90% - return in the future
 - 70% - recommend for vacation
 - 80% - recommend for getaway
- **Geographic Location**
 - 32% - New York State
 - 10% - Pennsylvania
 - 10% - New Jersey
 - 8% - California
- **LGBTQIA+ Identification**
 - 20% - yes
 - 69% - no
 - 10% - prefer not to respond



Visitor Profile: Families with Kids (college)

20% of families selected a higher education institution being the primary reason for travel. Families traveling with this purpose almost always stay overnight, but they are not staying very long with 42% staying for only one night. This segment spends the most on lodging at hotels, likely needing at least two rooms. **This segment is not experiencing as much of Ithaca and Tompkins County as other segments** with the majority of their time in the destination being on campus or at restaurants. However, they are spending the most on retail - likely connected to university purchases.

- **Overnight stay**
 - 89% overall stay overnight
 - 43% stayed for 2-3 nights
 - 42% stayed for 1 night
 - 7% stayed more than 6 nights
- **Accommodation Type**
 - 84% stayed in hotel/motels or inns
 - 7% stayed with family and friends
 - 7% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Additional Activities**
 - 67% dine at restaurants
 - 66% on-campus activities
 - 44% visit the gorges and waterfalls
- **Seasonality**
 - 38% visit in the spring
 - 25% visit in the winter
 - 21% visit in the summer
 - 16% visit in the fall
- **Spending (per day)**
 - \$256 - lodging
 - \$140 - dining
 - \$87 - retail
 - \$58 - transportation
 - \$38 - outdoor experiences
 - \$48 - craft beverages
 - \$22 - museums and attractions
 - \$48 - other entertainment
- **Satisfaction**
 - 77% - return in the next year
 - 93% - return in the future
 - 64% - recommend for vacation
 - 72% - recommend for getaway
- **Geographic Location**
 - 29% - New York State
 - 12% - New Jersey
 - 9% - California
 - 8% - Massachusetts
- **LGBTQIA+ Identification**
 - 17% - yes
 - 66% - no
 - 17% - prefer not to respond



Visitor Profile: Couples

The next highest visitor type were couples. Couples primarily stayed in hotels with a majority staying 2-3 nights. Couples are more likely to visit the craft beverage attractions including wineries, but the spend less than families and friends in this space. Couples are visiting primarily in the summer with the next highest season being fall. Couples are predominantly coming from New York State, but have additional geographic opportunities in New Jersey, Pennsylvania and Connecticut. These could be a target market for expansion.

- **Overnight stay**
 - o 75% of Couples visiting Ithaca and Tompkins County stay overnight.
 - o 51% stayed for 2-3 nights
 - o 14% stayed for 1 night
 - o 18% stayed for 4-5 or more nights
- **Accommodation Type**
 - o 55% stayed in hotel/motels or inns
 - o 13% stayed with family and friends
 - o 15% stayed in an Airbnb/VRBO/Homeaway or other home share platform
- **Primary Reason for Travel**
 - o 23% visited for outdoor leisure and sightseeing
 - o 12% visited for friends and family
 - o 11% just to get away
- **Additional Activities**
 - o 65% dine at restaurants
 - o 56% visit the gorges and waterfalls
 - o 42% hike local trails
 - o 41% visit local wineries/breweries/cideries
 - o 38% visit Ithaca Commons
- **Seasonality**
 - o 38% visit in the summer
 - o 27% visit in the fall
 - o 21% visit in the spring
 - o 14% visit in the winter
- **Spending (per day)**
 - o \$171 – lodging
 - o \$131 – dining
 - o \$35 – retail
 - o \$13 – transportation
 - o \$15 – outdoor experiences
 - o \$21 – craft beverages
 - o \$5 – museums and attractions
 - o \$9 – other entertainment
- **Satisfaction**
 - o 80% - return in the next year
 - o 94% - return in the future
 - o 73% - recommend for vacation
 - o 82% - recommend for getaway
- **Geographic Location**
 - o 39% - New York State
 - o 10% - Pennsylvania
 - o 8% - New Jersey
 - o 6% - Connecticut
- **LGBTQIA+ Identification**
 - o 17% - yes
 - o 77% - no
 - o 6% - prefer not to respond



Visitor Profile: Friends

The fourth most prevalent visitor type was groups of friends traveling together. Friends are more likely to stay in a homeshare property than the other top visitor profiles. This could be because of the cost effective nature of splitting a home, amenities of being able to cook, etc. Friends are also more likely to visit Ithaca Commons than other top visitor profiles and have the second highest spending on retail behind college-bound families. Groups of friends are also more likely to travel in the shoulder periods with over 30% visiting in the fall. Groups of friends are predominantly coming from New York State, but have the lowest representation from New Jersey than other top profiles. This could be a target market for expansion.

- **Overnight stay**
 - o 75% overall stay overnight
 - o 56% stayed for 2-3 nights
 - o 18% stayed for 1 night
 - o 11% stayed more than 6 nights
- **Accommodation Type**
 - o 50% stayed in hotel/motels or inns
 - o 30% stayed in an Airbnb/VRBO/Homeaway or other home share platform
 - o 9% stayed with family and friends
- **Primary Reason for Travel**
 - o 23% visited for outdoor leisure and sightseeing
 - o 10% visited for friends and family
 - o 8% for a special event or festival
- **Additional Activities**
 - o 60% dine at restaurants
 - o 53% visit the gorges and waterfalls
 - o 51% visit Ithaca Commons
 - o 51% relax
 - o 47% hike a local trail
- **Seasonality**
 - o 31% visit in the fall
 - o 27% visit in the summer
 - o 27% visit in the spring
 - o 14% visit in the winter
- **Spending (per day)**
 - o \$127 – lodging
 - o \$75 – dining
 - o \$71 – retail
 - o \$46 – transportation
 - o \$17 – outdoor experiences
 - o \$48 – craft beverages
 - o \$8 – museums and attractions
 - o \$25 – other entertainment
- **Satisfaction**
 - o 84% - return in the next year
 - o 100% - return in the future
 - o 71% - recommend for vacation
 - o 90% - recommend for getaway
- **Geographic Location**
 - o 39% - New York State
 - o 10% - Pennsylvania
 - o 6% - New Jersey
 - o 6% - Texas
- **LGBTQIA+ Identification**
 - o 24% - yes
 - o 76% - no





Thank You

Results and analysis prepared by JLL
for Visit Ithaca and the Tompkins County Tourism Program



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