

Warren County Tourism Study

May 23, 2022



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Project Orientation

Warren County engaged Hunden Strategic Partners to conduct a tourism analysis for the County, as well as competitive destinations in the northeast and across the country. HSP will provide competitor market data to help formulate a dashboard for future data tracking and benchmarking. HSP's analysis intends to answer the following key questions:

- For Warren County and for the competitive destinations, who are the visitor populations?
- Which summer and winter destinations are most competitive with Warren County?
- For the summer and winter destinations, which have shown the greatest growth over the past five years?
- What are Warren County's top five competitor destinations spending on marketing and advertising? How are they investing marketing dollars (to reach group travel versus leisure)?
- What metrics do competitive destinations use to track success and growth?
- What best practices have these destinations followed to cultivate growth that is faster than their competitors?



Competitive Vacation Destinations

HSP analyzed Warren County's indicated competitive destinations to understand how they fare and navigate the different seasons. By first understanding the destination and their practices, best practices and takeaways from each destination will be provided.

Competitive Vacation Destinations	
Year-Round	
Essex & Hamilton County/Lake Placid, NY Saratoga Springs, NY Albany, NY	
Spring, Summer, Fall	
Hershey, PA Finger Lakes, NY Cape Cod, MA Hampton Beach, NH Atlantic City, NJ	
Winter	
Watertown, NY Woodstock, NH Stowe, VT Rutland, VT Daytona Beach, FL	

Source: Hunden Strategic Partners



Ranking Competitors

HSP generated a competitive score for each of the identified locations. Scores are based on HSP’s analysis of seasonal visitation and overlapping target markets with Warren County. These scores determine the most important competitors for Warren County to continually benchmark performance against.

Essex County (Lake Placid) is Warren County’s biggest competitor as they pull visitors from the same region and compete during all seasons for the same visitors origins.

Location	Summer Competitor?	Winter Competitor?	Visitor Market Overlap?	Competitive Score
Essex County	Green	Green	Green	3
Hershey/Harrisburg	Green	Yellow	Green	2.5
Woodstock/White Mountains	Green	Green	Yellow	2.5
Saratoga Springs	Green	Yellow	Green	2.5
Rutland	Green	Green	Yellow	2.5
Cape Cod	Green	Yellow	Green	2.5
Stowe	Yellow	Green	Yellow	2
Albany	Yellow	Yellow	Green	2
Atlantic City	Yellow	Yellow	Green	2
Finger Lakes	Green	Red	Yellow	1.5
Daytona Beach	Yellow	Yellow	Yellow	1.5
Hampton Beach	Green	Red	Yellow	1.5
Watertown/1000 Islands	Yellow	Red	Yellow	1

A higher competitive score denotes destination is a true competitive destination to Warren County and their performance should be continually benchmarked against. The highest possible competitive score is a 3. The scores are color-coded for ease of analysis. Green denotes a high score with representing low scores.

Green dot (competitive, value 1), yellow (.5), red (not competitive, 0)
 Source: Hunden Strategic Partners

Competitor Asset Comparison

HSP ranked the assets and events of each competitive destination to rank each location's tourism package.

Warren County scores well in this analysis but can improve by increasing offering in categories not ranked well in (yellow or green). Of the areas ranked poorly in, Warren County may consider adding hotels to its ski areas and building assets to drive year-round sports tourism. Further analysis will be needed to determine if adding these assets would be financially feasible.

Location	Competitive Destination Destination Offering Analysis										Asset Offering Score
	Destination Hiking	Destination Skiing	Notable Lakes	Ocean	Amusement Parks	Arena	Gaming	Sports Tourism	Special Events	Convention Center	
Essex County	Green	Green	Green	Red	Red	Green	Red	Green	Green	Green	7
Warren County	Green	Yellow	Green	Red	Green	Green	Red	Yellow	Green	Red	6
Atlantic City	Red	Red	Red	Green	Yellow	Green	Green	Yellow	Green	Green	6
Daytona Beach	Red	Red	Red	Green	Yellow	Yellow	Yellow	Green	Green	Green	5.5
Woodstock/White Mountains	Green	Green	Green	Red	Green	Red	Red	Red	Green	Red	5
Cape Cod	Red	Red	Red	Green	Yellow	Red	Yellow	Green	Green	Green	5
Saratoga Springs	Yellow	Yellow	Green	Red	Red	Red	Green	Red	Green	Green	5
Hershey/Harrisburg	Yellow	Red	Red	Red	Green	Green	Red	Green	Red	Green	4.5
Albany	Yellow	Red	Red	Red	Red	Green	Green	Green	Red	Green	4.5
Stowe	Green	Green	Yellow	Red	Red	Red	Red	Yellow	Green	Red	4
Finger Lakes	Green	Yellow	Green	Red	Red	Red	Green	Red	Red	Red	3.5
Rutland	Green	Green	Yellow	Red	Red	Red	Red	Red	Green	Red	3.5
Hampton Beach	Red	Red	Red	Green	Red	Red	Yellow	Red	Green	Red	2.5
Watertown/1000 Islands	Red	Red	Green	Red	Red	Red	Red	Red	Red	Red	1

Green dot (strong asset, value 1), yellow (low supply and/or low quality, .5), red (trait not present, 0)
 Source: Hunden Strategic Partners

Summer Visitation Comparison

Summer Hotel Room Demand Overtime (June, July August Combined)

Sorted by Five-Year Growth Rate

Year	Volusia County, FL (Daytona Beach)	Grafton County, VT (Woodstock)	Atlantic County, NJ (Atlantic City)	Lamoille County, VT (Stowe)	Rutland County, VT	Essex County, NY	Warren County, NY	Dauphin County, PA (Hershey)	Barnstable County, MA (Cape Cod)	Finger Lakes, NY (Seneca, Cayuga, Yates)	Jefferson County, NY (1000 Islands)	Saratoga County, NY	Rockingham County, NH (Hampton Beach)	Albany County, NY
2012	627,690	210,216	1,674,934	127,386	156,141	152,634	463,910	546,158	782,269	70,791	174,080	200,505	335,433	457,241
2013	684,910	213,876	1,581,658	130,159	155,907	150,335	446,156	572,758	779,088	75,992	169,987	198,054	330,661	463,224
2014	725,042	220,862	1,519,980	132,740	158,093	154,256	460,793	581,058	770,145	76,165	180,095	223,215	362,651	505,135
2015	747,585	220,002	1,292,607	128,272	151,984	151,755	454,289	587,282	772,776	74,507	176,110	238,321	374,256	497,801
2016	775,410	223,899	1,558,892	132,948	149,890	151,768	452,189	592,444	767,590	79,465	172,067	236,878	366,266	489,532
2017	755,347	228,521	1,456,085	130,357	149,828	148,818	455,601	583,830	770,269	95,982	169,219	249,373	354,050	473,259
2018	842,770	248,262	1,725,414	131,172	152,621	151,160	468,019	591,963	769,957	100,023	171,755	266,985	360,530	460,971
2019	823,671	250,026	1,668,874	133,795	154,263	153,302	475,711	637,617	742,924	99,346	174,582	269,966	370,607	481,662
2020	663,574	153,031	1,246,010	65,794	83,458	107,141	317,334	306,948	494,596	59,257	115,015	149,034	226,740	224,984
2021	894,635	236,367	1,477,028	131,081	150,370	144,886	440,154	561,336	739,098	91,279	160,882	235,802	331,562	417,999
2015-19 Growth	10.2%	13.6%	29.1%	4.3%	1.5%	1.0%	4.7%	8.6%	-3.9%	33.3%	-0.9%	13.3%	-1.0%	-3.2%
2017-21 Growth	18.4%	3.4%	1.4%	0.6%	0.4%	-2.6%	-3.4%	-3.9%	-4.0%	-4.9%	-4.9%	-5.4%	-6.4%	-11.7%

Source: CoStar

HSP compared summer hotel demand in each identified competitive destination to determine which destinations have grown in the most in recent years. From 2015 until 2019 the Finger Lakes and Atlantic City saw the greatest increases in hotel demand prior to the pandemic. The pandemic hindered hotel demand in many of the competitive destinations, resulting in lower to negative growth rates in hotel demands in every market except Florida. HSP assumes this may in part be due to lower COVID-19 regulations in the state of Florida.

Winter Visitation Comparison

Winter Demand Growth (January, February, March Combined)
Sorted by Five-Year Growth Rate

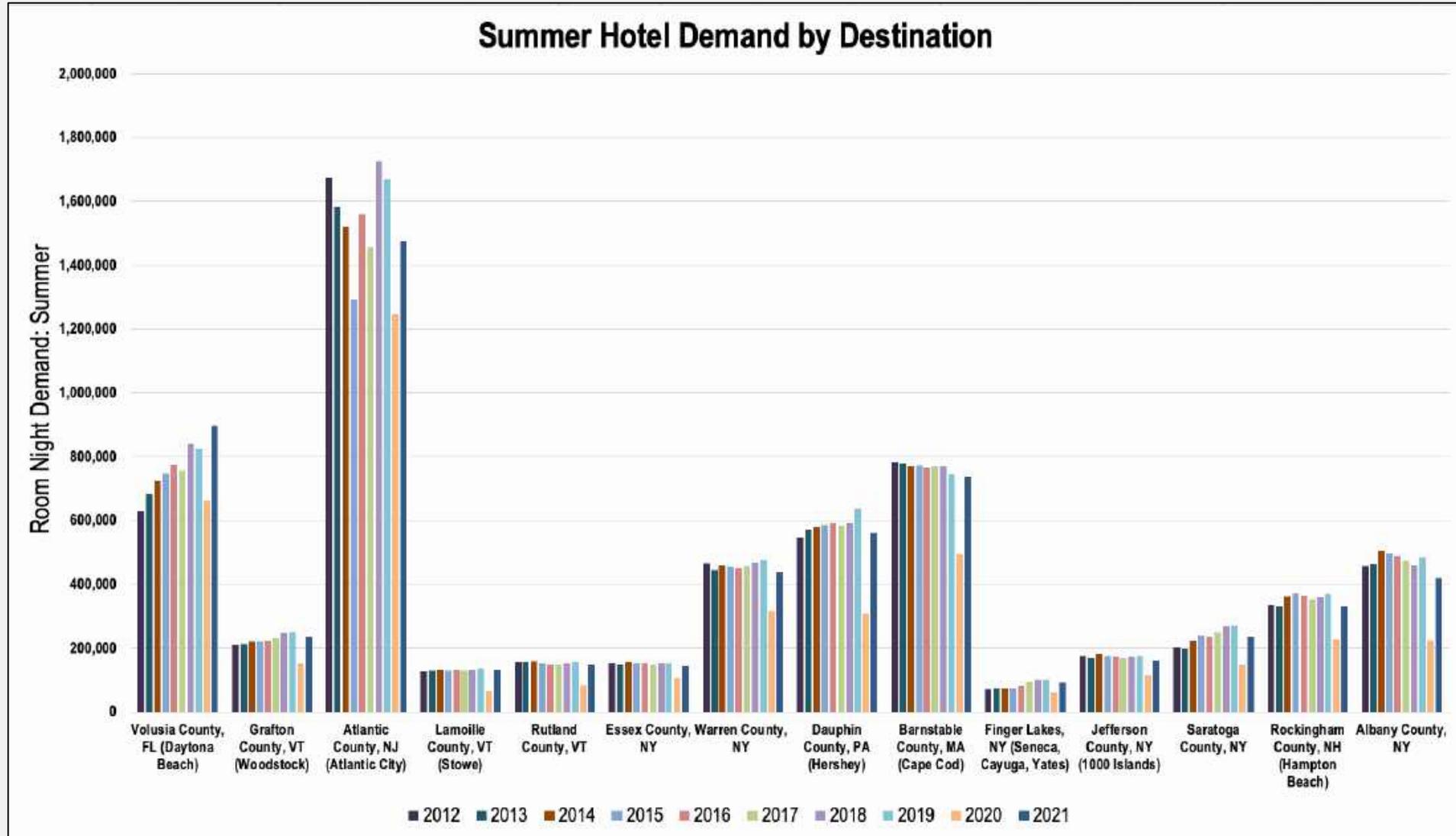
Year	Lamoille County, VT (Stowe)	Rutland County, VT	Grafton County, VT (Woodstock)	Finger Lakes, NY (Seneca, Cayuga, Yates)	Jefferson County, NY (1000 Islands)	Volusia County, FL (Daytona Beach)	Warren County, NY	Essex County, NY	Rockingham County, NH (Hampton Beach)	Dauphin County, PA (Hershey)	Barnstable County, MA (Cape Cod)	Saratoga County, NY	Albany County, NY	Atlantic County, NJ (Atlantic City)
2013	98,310	123,980	127,012	41,403	79,633	682,806	157,592	88,041	183,515	331,623	216,193	118,772	324,992	1,005,206
2014	99,168	114,755	130,529	41,756	77,217	703,435	144,435	81,134	187,668	368,343	203,634	126,635	342,784	816,823
2015	100,262	116,391	140,657	41,627	78,767	736,223	137,080	80,189	210,677	386,206	215,186	150,578	361,368	670,258
2016	94,777	106,517	135,194	42,508	76,809	772,673	138,701	78,741	213,660	375,416	219,165	136,969	353,442	1,064,188
2017	97,520	111,237	147,063	47,986	77,562	728,616	146,190	81,014	215,499	383,075	215,368	161,888	363,726	1,002,062
2018	95,146	110,418	147,470	52,534	79,733	781,018	154,411	83,397	226,518	406,696	205,107	161,172	351,700	981,743
2019	98,234	116,042	153,626	54,140	77,536	804,080	151,299	81,566	215,695	405,943	169,996	168,503	355,385	1,091,279
2020	83,869	101,650	142,896	47,373	70,507	714,212	135,279	73,050	203,448	353,292	172,486	149,878	310,971	892,708
2021	76,446	96,937	131,371	47,027	69,385	730,452	132,511	69,618	158,508	258,978	143,207	108,210	228,768	712,561
2022	115,846	133,598	167,396	58,751	82,655	805,778	159,000	85,082	228,031	391,800	193,001	146,494	315,121	783,708
2015-19 Growth	-2.0%	-0.3%	9.2%	30.1%	-1.6%	9.2%	10.4%	1.7%	2.4%	5.1%	-21.0%	11.9%	-1.7%	62.8%
2018-22 Growth	21.8%	21.0%	13.5%	11.8%	3.7%	3.2%	3.0%	2.0%	0.7%	-3.7%	-5.9%	-9.1%	-10.4%	-20.2%

Source: CoStar

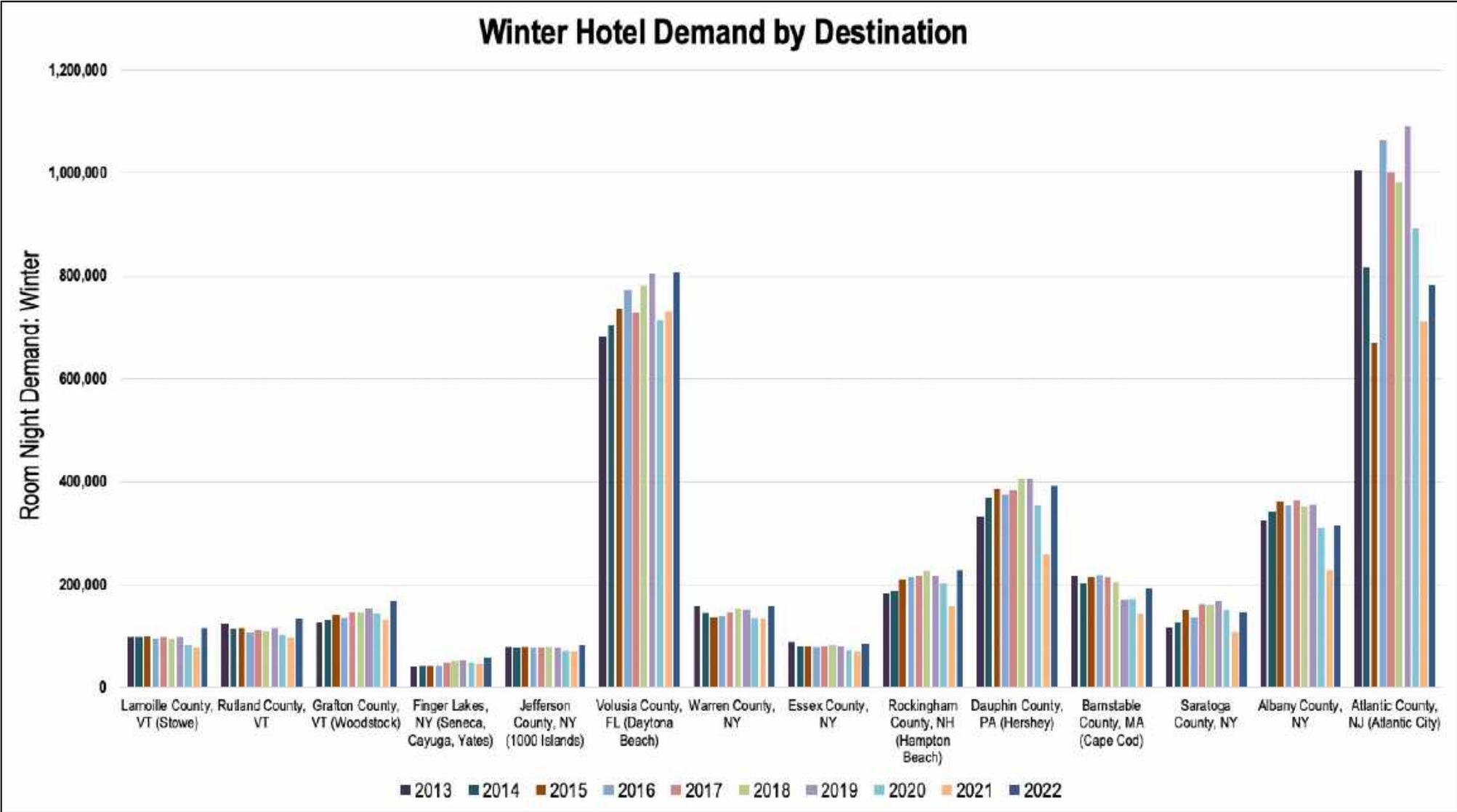
HSP compared winter hotel demand in the identified competitive destinations to determine which markets have experienced growth in winter tourism in recent years. Before the pandemic, the Finger Lakes and Atlantic City saw strong growth in the number of overnight visitors.

Comparing pre- (2018) and post (2022) pandemic demand, the destinations in Vermont with strong nodes of hospitality nodes near ski hills experienced the greatest growth in tourism.

Summer Visitation Comparison



Winter Visitation Comparison



Chapter 2: Warren County Tourism Dashboard

Regional Area & Seasonal Visits Analysis

Warren County & Competitor Destinations - Estimated Visits, All of 2019 and Seasonally in 2021 beyond 30 Miles, Staying at least Two Hours

Overall Destination	2019 Visitation				2021 Visitation				Growth from 2019 to 2021	
	Total Visits	Unique Visitors	Average Visitors Per Week	Visit Frequency (Max 1 per day)	Total Visits	Unique Visitors	Average Visitors Per Week	Visit Frequency (Max 1 per day)	% Change in Total Visits	% Change in Unique Visitors
Daytona Beach, FL	35,200,000	5,700,000	109,615	6.14	40,200,000	6,200,000	119,231	6.48	14.2%	8.8%
Cape Cod, MA	29,700,000	3,600,000	69,231	8.23	33,900,000	3,800,000	73,077	8.92	14.1%	5.6%
Atlantic City, NJ	27,300,000	6,300,000	121,154	4.34	22,700,000	4,900,000	94,231	4.67	-16.8%	-22.2%
Finger Lakes	17,000,000	2,500,000	48,077	6.80	17,600,000	2,500,000	48,077	7.01	3.5%	0.0%
Hershey, PA	13,800,000	5,100,000	98,077	2.70	11,700,000	4,200,000	80,769	2.82	-15.2%	-17.6%
Warren County	12,500,000	2,200,000	42,308	5.65	13,100,000	2,200,000	42,308	5.93	4.8%	0.0%
Thousand Islands	7,300,000	833,200	16,023	8.78	8,000,000	897,800	17,265	8.92	9.6%	7.8%
Woodstock, NH	6,500,000	1,200,000	23,077	5.55	7,100,000	1,300,000	25,000	5.54	9.2%	8.3%
Essex County/Lake Placid	6,200,000	1,000,000	19,231	6.08	6,100,000	970,800	18,669	6.33	-1.6%	-2.9%
Hampton Beach, MA	5,300,000	1,300,000	25,000	4.10	5,800,000	1,400,000	26,923	4.24	9.4%	7.7%
Rutland Ski Area, VT	4,800,000	662,900	12,748	6.61	4,700,000	325,100	6,252	7.14	-2.1%	-51.0%
Saratoga Springs	4,000,000	1,100,000	21,154	3.85	3,500,000	817,000	15,712	4.08	-12.5%	-25.7%
Albany, NY	3,300,000	906,900	17,440	3.65	2,200,000	399,500	7,683	5.60	-33.3%	-55.9%
Stowe, VT	3,100,000	671,200	12,908	4.64	3,000,000	592,700	11,398	5.11	-3.2%	-11.7%

Source: Placer.ai and HSP

The table above shows the first half of the Regional Area and Seasonal Visit dashboard. HSP created POIs (Points of Interest) on Placer.ai that capture Warren County and competitive destinations to track visitation trends by year and season and household incomes of visitors. Filters have been added to the analysis to only capture data from visitors travelling over 30 miles from their homes and that stayed in Warren County for over two hours. HSP has provided visitation numbers for 2019 and 2021 as well as percent changes between the two years to show performance data of Warren County compared to its competitors.

Each column is conditionally formatted with red cells showing poor performance and green cells showing the top performers. The tourism index column compares the number of unique visitors of Warren County and a competitive destination.

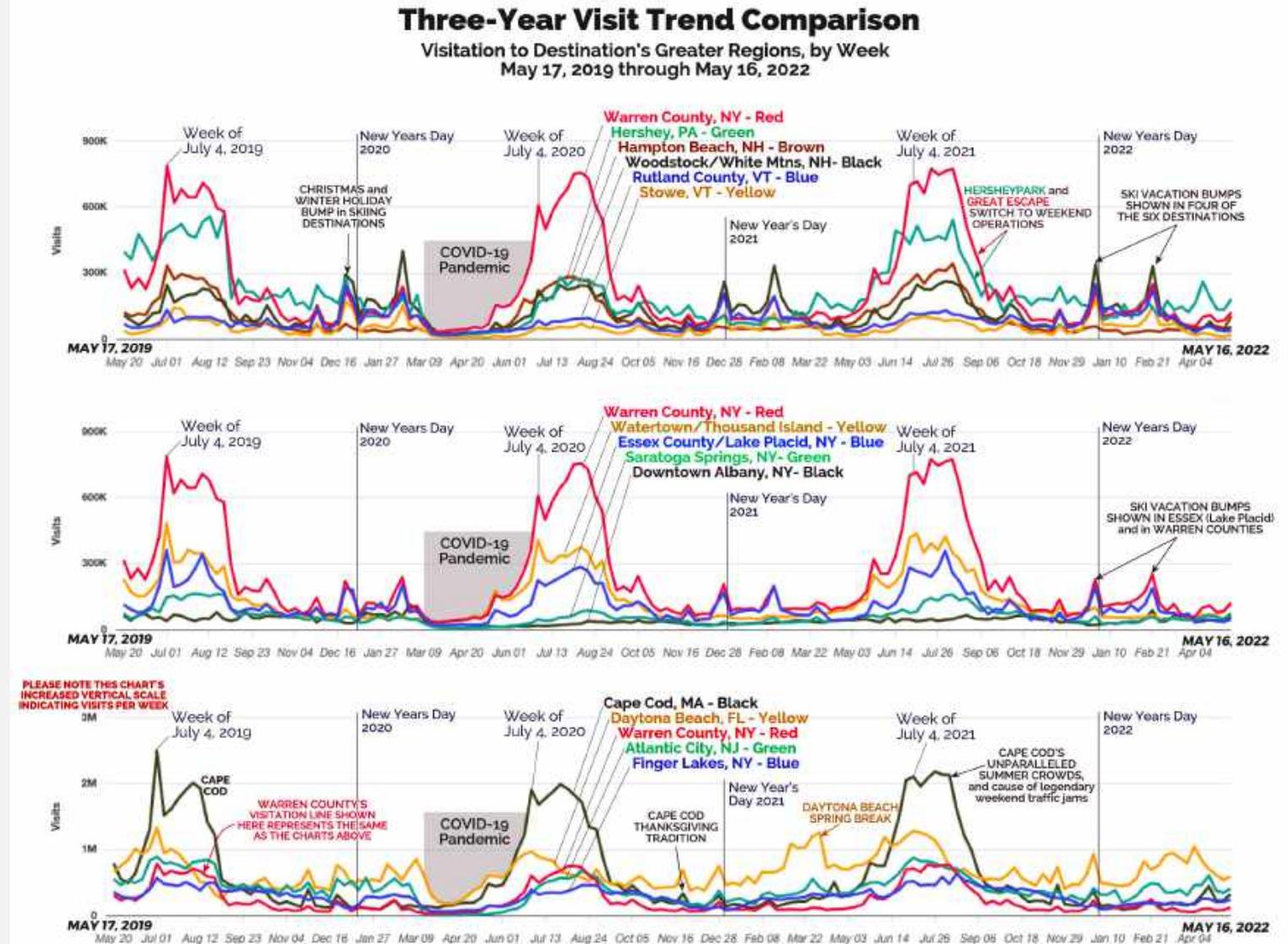
Each POI is saved in Placer.ai so that HSP can update visitation statistics for yearly data in the future allowing Warren County to continuously track visitation trends and compare data to competitive destinations.

Regional Area & Seasonal Visits Analysis

The Charts to the right show Warren County's visitation over three years in relation to their competitors' greater tourism regions in this study, and are the same regions shown in the previous table.

The comp set data has been broken down into three separate charts for clarity over the same time span. Warren County is red in each chart, and the competitors are labeled by color.

This is the most recent data available through Placer.ai, beginning May 17, 2019, and ending May 16, 2022.



Regional Area & Seasonal Visits Analysis

Warren County & Competitor Destinations - Estimated Visits, All of 2019 and Seasonally in 2021 beyond 30 Miles, Staying at least Two Hours

Overall Destination	2021 Summer Visitation (107 days)				2021 Autumn Visitation (84 days)				2022 Winter Visitation (107 days)				Average Household Income			Percent of Visits from Households with High Annual Incomes		
	Total Visits	Unique Visitors	Average Visitors Per Week	Frequency (Max 1 per day)	Total Visits	Unique Visitors	Average Visitors Per Week	Frequency (Max 1 per day)	Total Visits	Unique Visitors	Average Visitors Per Week	Frequency (Max 1 per day)	Average Household Income (2019)	Average Household Income (2021)	Percent Change	Percent with incomes over \$200,000 (2019)	Percent with incomes over \$200,000 (2021)	Percent Change
Daytona Beach, FL	8,600,000	1,900,000	124,305	4.60	1,400,000	445,700	36,704	3.16	1,800,000	542,700	35,505	3.33	\$105,900	\$107,100	1.1%	11.5%	11.9%	3.5%
Cape Cod, MA	1,700,000	593,400	38,835	2.71	694,900	198,800	16,372	2.99	668,800	219,200	14,341	2.71	\$112,900	\$116,200	2.9%	13.1%	14.5%	10.7%
Atlantic City, NJ	3,200,000	659,900	43,187	4.87	836,800	204,100	16,808	4.10	1,300,000	304,800	19,941	4.27	\$113,900	\$116,100	1.9%	13.0%	13.5%	3.8%
Finger Lakes	7,200,000	1,700,000	111,257	4.26	3,800,000	769,100	63,337	4.97	2,700,000	632,600	41,387	4.27	\$111,400	\$115,700	3.9%	13.0%	13.9%	6.9%
Hershey, PA	4,800,000	769,800	50,380	6.29	1,100,000	227,700	18,752	4.93	864,200	175,800	11,501	4.93	\$81,600	\$83,600	2.5%	5.8%	6.2%	6.9%
Warren County	6,300,000	3,000,000	196,335	2.10	2,200,000	1,000,000	82,352	2.14	2,200,000	909,900	59,529	2.41	\$99,500	\$97,600	-1.9%	10.1%	9.8%	-3.0%
Thousand Islands	736,800	225,100	14,732	3.27	572,500	181,900	14,980	3.15	673,000	255,600	16,722	2.63	\$98,000	\$91,800	-6.3%	9.8%	9.3%	-5.1%
Woodstock, NH	1,100,000	308,300	20,177	3.67	583,500	186,600	15,367	3.13	945,100	239,300	15,656	3.95	\$136,700	\$141,000	3.1%	17.9%	19.3%	7.8%
Essex County/Lake Placid	1,600,000	325,100	21,276	4.82	937,000	230,100	18,949	4.07	1,600,000	393,100	25,718	4.09	\$113,400	\$116,400	2.6%	13.1%	14.2%	8.4%
Hampton Beach, MA	2,900,000	797,000	52,160	3.67	1,100,000	312,900	25,768	3.45	1,900,000	489,300	32,012	3.91	\$117,100	\$112,700	-3.8%	13.7%	12.9%	-5.8%
Rutland Ski Area, VT	3,600,000	1,200,000	78,534	3.13	620,900	217,200	17,887	2.86	629,800	214,600	14,040	2.94	\$95,100	\$94,100	-1.1%	9.0%	9.1%	1.1%
Saratoga Springs	23,800,000	3,400,000	222,513	6.93	3,300,000	765,500	63,040	4.29	2,700,000	649,800	42,512	4.21	\$129,100	\$133,400	3.3%	17.1%	18.3%	7.0%
Albany, NY	10,500,000	3,400,000	222,513	3.13	3,900,000	1,400,000	115,293	2.88	5,800,000	1,900,000	124,305	2.98	\$98,200	\$92,700	-5.6%	9.9%	8.9%	-10.1%
Stowe, VT	15,200,000	3,400,000	222,513	4.40	6,700,000	1,500,000	123,528	4.35	10,900,000	2,600,000	170,101	4.12	\$79,400	\$80,300	1.1%	5.7%	5.9%	3.5%

Source: Placer.ai and HSP

The table above shows the second half of the Regional Area and Seasonal Visit dashboard. This portion of the dashboard shows visitation to Warren County and its competitive destinations by season as well as the average household income of visitors to each location.

The data can be updated on a yearly basis to track visitation trends by season to Warren County and its competitors. The current data shows that Daytona Beach and Atlantic City have the strongest year-round tourism compared to other destinations with green cells (highest visitation numbers) in the summer, autumn and fall seasons.

Ski Area Analysis

		Ski Areas in Warren County and Competitor Destination Areas - Estimated Visitation, 2019 and 2021 beyond 30 Miles (Sorted by 2021-2022 Winter Visitation)															
		2019-20 Winter Visitation Nov 22 - April 8 (138 days)		2021-22 Winter Visitation (138 days)		Growth 2019 to 2021			2021 Summer Visitation (107 days)		Average Household Income			Percent of Visits from Households with High Annual Incomes			
Destination Area	Ski Area	Total Visits	Unique Visitors	Total Visits	Unique Visitors	% Change Total Visits	% Change Unique Visitors	% of Visitors traveling over 100 miles in 2021	Total Visits	Unique Visitors	% of Visitors traveling over 100 miles in 2021	Average Household Income			Percent with incomes over \$200,000 (2019)	Percent with Incomes over \$200,000 (2021)	% Change
												Average Household Income (2019)	Average Household Income (2021)	% Change			
Rutland, VT	Okemo Mountain	800,700	248,700	790,700	293,400	-1.2%	18.0%	88.1%	10,300	5,600	81.0%	\$129,300	\$127,000	-1.8%	16.2%	16.1%	-0.6%
Rutland, VT	Killington Ski Resort	754,800	267,600	763,600	286,000	1.2%	6.9%	92.5%	4,800	4,600	79.0%	\$119,000	\$123,800	4.0%	13.5%	14.9%	10.4%
Stowe, VT	Stowe Mountain	600,900	180,700	710,900	246,600	18.3%	36.5%	95.0%	47,900	45,000	93.2%	\$134,400	\$134,300	-0.1%	17.6%	17.7%	0.6%
Woodstock, NH	Loon Mountain	607,700	203,900	614,700	234,400	1.2%	15.0%	79.0%	14,000	13,100	32.0%	\$89,500	\$94,100	5.1%	6.7%	8.0%	19.4%
Warren County, NY	Gore Mountain	290,200	117,100	354,600	136,600	22.2%	16.7%	63.5%	210,900	96,800	95.6%	\$171,400	\$162,400	-5.3%	22.5%	23.6%	4.9%
Woodstock, NH	Waterville Valley	369,700	129,000	306,500	127,400	-17.1%	-1.2%	71.8%	6,100	2,800	85.2%	\$120,000	\$117,500	-2.1%	14.4%	15.2%	5.6%
Essex County, NY	Whiteface Mountain	283,500	126,200	302,400	137,500	6.7%	9.0%	83.5%	98,100	48,700	75.6%	\$143,300	\$138,800	-3.1%	19.8%	19.5%	-1.5%
Finger Lakes, NY	Bristol Mountain	121,400	47,200	185,400	65,000	52.7%	37.7%	20.1%	18,100	3,600	52.8%	\$131,900	\$134,400	1.9%	16.9%	17.7%	4.7%
Woodstock, NH	Cannon Mountain	194,200	73,600	159,700	75,100	-17.8%	2.0%	71.8%	56,300	27,500	85.0%	\$172,100	\$154,700	-10.1%	25.5%	22.8%	-10.6%
Warren County, NY	West Mountain	75,900	47,000	121,500	78,500	60.1%	67.0%	59.3%	156,700	76,600	81.4%	\$141,000	\$134,900	-4.3%	19.9%	18.9%	-5.0%
Rutland, VT	Pico Mountain	133,500	54,900	105,000	43,800	-21.3%	-20.2%	89.4%	126,000	42,100	71.1%	\$131,900	\$134,500	2.0%	17.7%	18.2%	2.8%
Stowe, VT	Bolton Valley Resort	50,100	24,400	64,500	32,000	28.7%	31.1%	83.0%	99,200	79,700	80.3%	\$134,100	\$130,800	-2.5%	17.7%	18.0%	1.7%

Dates of Measurement: Winter 2018-19: Nov 28 through April 14. Winter 2021-22: November 24 through April 10, 2022. Summer: May 28 through September 12, 2021.

Source: Placer.ai, and HSP research. **A NOTE from HSP:** Placer.ai uses in-house designed algorithms that tracks cell-phone movements (involving about 10% to 15% of U.S. residents), to estimate the total attendance at any place during any time frame. While the overall relative data is quite accurate, Placer's estimates involving numeric attendance figures tend to be overstated evenly across all geographies over the actual recorded attendance. In this table, the ratio of one ski resort to another is very accurate. The general trend of increase and decrease in attendance year-over-year is also quite accurate. However, please be advised that the total numeric attendance figures shown during a period of time is generally inflated by a very similar percentage in all cases.

Similar to the Regional Area and Seasonal Visits analysis table, HSP has created POIs for ski areas within the competitive destinations. The table above shows the total visits during the winter and summer seasons of 2019 and 2021, as well as the percent change between the two years. The table also shows the percentage of visitors traveling from over 100 miles for skiing and hiking, as well as average household incomes of visitors.

Rutland's Okemo and Killington Mountains attracted the most visitors during the 2021-2022 winter season, followed by Stowe Mountain.

The POIs can be updated on a yearly basis to show the visitation trends in future years to help with ongoing analysis.

Overall Destination Visitation

HSP geo-fenced large attractions and downtown corridors of Warren County and its competitors. This allows Warren County to benchmark its performance by attraction, in terms of number of visitors and types of visitors. Each column has its own ranking to show the top performers in each category.

Of competitive destinations, Atlantic City's Boardwalk and Tanger Outlets receive the highest visitation numbers, followed by Hersheypark and its surrounding assets such as the Giant Center and ZooAmerica.

Warren County and Competitor Visitation Comparison: Downtown Cores, Hubs and Selected Iconic Attractions											
2019 and 2021 Total Visits and Unique Visitors <i>travelling from beyond 30 Miles</i> , and sorted by Unique Visitors in 2021											
Overall Destination	Walkable Destination Hub	Total Estimated Visits (2019)	Total Estimated Visits (2021)	Total Estimated Unique Visitors (2019)	Total Estimated Unique Visitors (2021)	% Change Between 2019 & 2021	Average Household Income (2019)	Percent with incomes over \$100,000 (2019)	Percent with incomes over \$200,000 (2019)	Percent with incomes over \$200,000 (2021)	
Lake George, NY	Lake George Village	4,200,000	4,800,000	1,400,000	1,600,000	14%	\$104,000	31.3%	10.9%	11.0%	
	Great Escape & Outlets Zone	3,800,000	3,900,000	1,500,000	1,600,000	7%	\$93,800	33.6%	8.5%	8.5%	
	Lake George - Downtown Village	2,800,000	3,200,000	1,200,000	1,400,000	17%	\$103,600	38.2%	10.7%	10.9%	
	Aviation Mall - Queensbury Exit	3,500,000	3,700,000	1,000,000	1,000,000	0%	\$88,200	30.6%	7.6%	7.6%	
	Bolton Landing - Business District	1,100,000	1,100,000	392,200	439,100	12%	\$136,700	48.0%	17.7%	18.0%	
	Warrensburg Area (*larger area)	1,580,000	1,600,000	398,400	428,300	8%	\$95,500	35.0%	8.5%	9.4%	
	Glens Falls (entire city limits)	1,800,000	1,700,000	392,500	351,100	-11%	\$85,100	29.9%	8.1%	7.3%	
	Warrensburg - Downtown	416,500	408,400	169,200	187,400	11%	\$96,800	35.1%	9.0%	10.1%	
	Glens Falls Downtown	368,600	376,500	157,100	152,800	-3%	\$88,700	36.1%	13.1%	9.5%	
	North Creek - Downtown Village	135,600	237,400	59,100	119,000	101%	\$125,500	42.4%	14.4%	13.5%	
	Gore Mountain Ski Area	332,500	354,800	120,300	114,000	-5%	\$126,700	44.9%	15.5%	15.7%	
North Creek Ski Bowl	21,600	27,800	8,200	12,200	49%	\$109,600	38.4%	11.8%	14.7%		
Lake Placid, NY	Downtown Lake Placid	2,700,000	2,300,000	771,800	711,000	-8%	\$155,900	40.4%	13.4%	13.5%	
	Saranac Lake	769,900	819,400	239,000	249,000	4%	\$88,600	30.3%	7.5%	8.6%	
	Whiteface Mountain	350,400	370,700	167,300	174,000	4%	\$128,300	43.9%	16.1%	18.2%	
Saratoga Springs, NY	Saratoga Springs Downtown	2,000,000	1,900,000	704,900	670,200	-5%	\$118,900	40.5%	14.3%	15.4%	
	Saratoga Race Course	473,800	277,400	429,900	246,900	-43%	\$117,900	41.6%	14.0%	14.0%	
	Saratoga Spa State Park - Arts & Spa Area	411,200	245,500	247,500	165,500	-33%	\$103,800	35.7%	10.8%	13.0%	
	Saratoga Harness Racing & Casino	408,100	143,400	358,700	129,000	-64%	\$92,400	31.9%	8.1%	8.6%	
Saratoga Spa State Park - Geyser Trail Area	57,200	64,900	45,800	52,300	14%	\$101,700	36.0%	10.9%	11.5%		
Hershey, PA	Hershey - Core Attractions	8,300,000	6,700,000	4,700,000	3,900,000	-17%	\$101,200	36.8%	10.4%	9.9%	
	Outlets at Hershey	1,300,000	1,200,000	809,300	797,700	-1%	\$89,100	30.7%	7.7%	7.1%	
	Hersheypark (theme park)	2,700,000	2,200,000	1,900,000	1,500,000	-21%	\$104,400	38.4%	11.2%	10.2%	
	Hershey Walkable Attractions Area	11,800,000	9,700,000	5,600,000	4,600,000	-18%	\$100,000	36.1%	10.1%	10.0%	
Stowe, VT	Stowe - Historic Village	861,000	913,200	348,200	372,800	7%	\$133,800	45.5%	17.3%	17.8%	
	Stowe Mountain Resort area	644,000	697,400	182,400	192,400	5%	\$158,000	50.7%	22.3%	24.4%	
Cape Cod, MA	Hyannis - Main Street & Inner Harbor	2,500,000	2,800,000	1,100,000	1,200,000	9%	\$121,400	43.3%	14.7%	15.0%	
	Provincetown - Commercial Street Area	1,900,000	2,000,000	838,000	832,000	-1%	\$117,200	42.0%	14.3%	14.4%	
	Woods Hole	1,400,000	1,400,000	659,200	727,700	10%	\$127,300	44.8%	16.8%	18.6%	
Mashpee Commons	739,600	887,200	287,400	347,700	21%	\$139,900	49.9%	19.9%	21.0%		
Hampton Beach, NH	Hampton Beach	2,200,000	2,500,000	910,000	1,100,000	21%	\$91,100	33.3%	7.7%	7.5%	
North Woodstock, NH	North Woodstock - Lincoln	2,200,000	2,400,000	904,300	1,000,000	11%	\$110,600	40.8%	12.1%	11.3%	
	North of North Woodstock-Flume Gorge	435,700	556,000	249,700	336,000	35%	\$104,900	38.7%	11.0%	9.9%	
	Littleton - Downtown & Riverwalk	544,800	620,700	212,900	287,600	35%	\$99,400	34.2%	9.5%	10.0%	
Loon Mountain Ski Resort Area	903,000	786,500	279,300	263,700	-6%	\$130,100	45.8%	17.1%	15.7%		
Finger Lakes, NY	Wartler Premium Outlets	1,100,000	1,000,000	684,300	681,100	0%	\$78,300	25.5%	5.0%	5.0%	
	Watkins Glen	1,200,000	1,400,000	522,800	654,500	25%	\$87,500	29.3%	7.2%	8.1%	
	Watkins Glen State Park Gorge	283,300	318,200	263,500	296,600	13%	\$94,700	32.7%	9.0%	9.2%	
	Geneva	651,800	708,300	240,800	291,100	21%	\$95,700	32.0%	9.2%	9.7%	
	Skaneateles	581,800	553,100	214,000	242,800	13%	\$104,000	36.2%	11.5%	12.5%	
	Canandaigua	438,300	517,600	180,700	225,400	25%	\$85,200	28.0%	6.6%	8.3%	
	Penn Yan	568,000	677,700	162,400	210,200	29%	\$88,700	31.9%	7.2%	8.3%	
	Auburn	459,400	411,500	133,400	128,400	-4%	\$84,400	28.3%	7.0%	7.3%	
	Seneca Falls	282,300	284,800	114,400	120,300	5%	\$88,300	29.5%	7.2%	7.1%	
Waterloo	93,300	117,600	48,100	63,200	31%	\$81,700	24.5%	5.3%	5.5%		
Watertown, NY	Alexandria Bay - 1000 Lakes Tourist Area	701,600	852,800	279,900	342,100	22%	\$84,000	24.4%	6.1%	5.8%	
	Clayton Visitors Area	558,700	715,100	181,300	228,900	26%	\$90,600	30.7%	7.8%	8.2%	
	Watertown - Downtown	456,700	391,500	128,600	126,600	-2%	\$71,600	21.0%	4.2%	4.6%	
	Sackets Harbor	183,000	210,000	80,600	94,900	18%	\$86,000	32.1%	7.7%	8.4%	
Rutland, VT	Killington Ski Resort & Lodges Area	2,100,000	2,000,000	454,800	406,200	-11%	\$139,200	47.7%	18.7%	19.5%	
	Killington - Ski Resort	977,800	759,200	307,500	240,800	-22%	\$136,300	47.7%	18.3%	19.4%	
	Rutland - Downtown	563,900	179,400	179,400	181,300	1%	\$93,800	31.0%	8.5%	9.2%	
Albany, NY	Downtown	2,200,000	992,300	880,800	404,700	-54%	\$96,200	33.4%	9.6%	9.1%	
Atlantic City	Boardwalk Hotels & Tanger Outlets	16,200,000	13,500,000	4,600,000	3,900,000	-15%	\$95,100	34.4%	9.2%	8.1%	
Daytona Beach	Boardwalk & Beach Piers	7,000,000	7,900,000	2,600,000	3,000,000	15%	\$78,100	25.0%	5.4%	5.2%	

Important Note for understanding and interpreting these estimated visitation figures: All numeric estimates shown here are from Placer.ai, through cell phone GPS tracking and "geofencing," which tracks the movements of between 10% and 15% of all U.S. cell phones. Algorithms are then applied to the raw data to represent actual attendance (both total visits and unique visitors) within a geographically defined area. By Placer.ai's own admission, as well as HSP's independent findings, these estimates are very likely to be over-estimated by a significant but relatively uniform percentage across all U.S. geographies. Therefore, the relational differences between the visitation totals are quite accurate, and can be used as a highly reliable measure of attendance performance over time, and to determine the relative popularity of a place, versus other places.

Source: Placer.ai and HSP research

Warren County Major POI Visitation

Warren County Visitation Comparison: Downtown Cores, Hubs and Selected Iconic Attractions
2019 and 2021 Total Visits and Unique Visitors *travelling from beyond 30 Miles*, and sorted by Unique Visitors in 2021

Overall Destination	Walkable Destination Hub	Total Estimated Visits (2019)	Total Estimated Visits (2021)	Total Estimated Unique Visitors (2019)	Total Estimated Unique Visitors (2021)	% Change Between 2019 & 2021	Average Household Income (2019)	Percent with incomes over \$100,000 (2019)	Percent with Incomes over \$200,000 (2019)	Percent with incomes over \$200,000 (2021)
Lake George, NY	Lake George Village	4,200,000	4,800,000	1,400,000	1,600,000	14%	\$104,000	31.3%	10.9%	11.0%
	Great Escape & Outlets Zone	3,800,000	3,900,000	1,500,000	1,600,000	7%	\$93,800	33.6%	8.5%	8.5%
	Lake George - Downtown Village	2,800,000	3,200,000	1,200,000	1,400,000	17%	\$103,600	38.2%	10.7%	10.9%
	Aviation Mall - Queensbury Exit	3,500,000	3,700,000	1,000,000	1,000,000	0%	\$88,200	30.6%	7.6%	7.6%
	Bolton Landing - Business District	1,100,000	1,100,000	392,200	439,100	12%	\$136,700	48.0%	17.7%	18.0%
	Warrensburg Area (*larger area)	1,580,000	1,600,000	398,400	428,300	8%	\$95,500	35.0%	8.5%	9.4%
	Glens Falls (entire city limits)	1,800,000	1,700,000	392,500	351,100	-11%	\$85,100	29.9%	8.1%	7.3%
	Warrensburg - Downtown	416,500	408,400	169,200	187,400	11%	\$96,800	35.1%	9.0%	10.1%
	Glens Falls Downtown	368,600	376,500	157,100	152,800	-3%	\$88,700	36.1%	13.1%	9.5%
	North Creek - Downtown Village	135,600	237,400	59,100	119,000	101%	\$125,500	42.4%	14.4%	13.5%
	Gore Mountain Ski Area	332,500	354,800	120,300	114,000	-5%	\$126,700	44.9%	15.5%	15.7%
	North Creek Ski Bowl	21,600	27,800	8,200	12,200	49%	\$109,600	38.4%	11.8%	14.7%

Important Note for understanding and interpreting these estimated visitation figures: All numeric estimates shown here are from Placer.ai, through cell phone GPS tracking and "geofencing," which tracks the movements of between 10% and 15% of all U.S. cell phones. Algorithms are then applied to the raw data to represent actual attendance (both total visits and unique visitors) within a geographically defined area. By Placer.ai's own admission, as well as HSP's independent findings, these estimates are very likely to be over-estimated by a significant but relatively uniform percentage across all U.S. geographies. Therefore, the relational differences between the visitation totals are quite accurate, and can be used as a highly reliable measure of attendance performance over time, and to determine the relative popularity of a place, versus other places.

Source: Placer.ai, and HSP research

HSP highlighted Warren County's top POIs to track performance within the county. Warren County's highest visited areas include Downtown Lake George and the Great Escape. The fastest growing area for tourism in the county between 2019 and 2021 was North Creek's Downtown Village suggesting future development of hospitality assets for Gore Mountain. Bolton Landing, North Creek and Gore Mountain attract visitors with the highest average household incomes.



Warren County STR Dashboard

ADR Table

The table on the right is a screenshot of a dynamic pivot table that tracks ADR data from 2012 – March 2022.

Warren County’s ADR performance is among the average performance throughout the year except in the months of July and August when rate rise into the \$160-\$170 range.

In July and August of 2019, Barnstable County had the highest ADR among the competitive set.

Atlantic County witnessed the highest ADR growth in the period during April and May, growing 37 percent in April and 42 percent in May from 2018’s rates.

ADR by Month In A Selected Year With Year-Over-Year Change													
Year	2019												
Destination/Competitor	Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	ADR Warren County, NY		\$118.80	\$134.98	\$113.62	\$106.51	\$117.84	\$132.67	\$169.43	\$178.11	\$134.96	\$126.08	\$112.61
ADR Essex County, NY		\$126.55	\$147.96	\$120.07	\$111.98	\$126.77	\$150.24	\$200.72	\$211.10	\$151.35	\$138.67	\$119.77	\$148.00
ADR Saratoga County		\$107.88	\$109.62	\$111.84	\$116.69	\$127.07	\$130.35	\$167.96	\$197.46	\$130.47	\$127.45	\$115.33	\$108.32
ADR Albany County, NY		\$103.68	\$111.66	\$115.78	\$110.56	\$116.14	\$111.11	\$118.76	\$120.43	\$111.10	\$114.02	\$104.95	\$99.31
ADR Dauphin County, PA		\$101.09	\$106.59	\$108.41	\$112.92	\$121.30	\$137.22	\$144.20	\$145.88	\$116.48	\$123.42	\$112.14	\$110.42
ADR Finger Lakes, NY (Seneca, Cayuga, Yates)		\$92.93	\$95.99	\$102.71	\$103.52	\$124.08	\$116.98	\$116.40	\$128.38	\$114.44	\$120.32	\$101.13	\$92.87
ADR Barnstable County, MA (Cape Cod)		\$124.89	\$131.61	\$126.20	\$140.16	\$174.78	\$237.29	\$327.08	\$339.01	\$216.00	\$169.52	\$142.18	\$148.07
ADR Rockingham County, NH (Hampton Beach)		\$102.12	\$105.37	\$101.93	\$104.97	\$119.01	\$129.05	\$145.89	\$149.28	\$137.63	\$137.72	\$113.21	\$111.74
ADR Atlantic County, NJ (Atlantic City)		\$92.24	\$97.21	\$103.05	\$122.44	\$134.14	\$139.48	\$137.58	\$136.06	\$135.06	\$131.70	\$126.77	\$129.87
ADR Jefferson County, NY (1000 Islands)		\$97.97	\$105.94	\$96.62	\$93.61	\$104.97	\$112.80	\$134.77	\$140.93	\$115.54	\$109.07	\$97.77	\$102.96
ADR Grafton County, VT (Woodstock)		\$136.20	\$151.05	\$129.39	\$125.91	\$137.45	\$161.09	\$172.59	\$170.65	\$156.65	\$172.20	\$136.27	\$145.92
ADR Rutland County, VT		\$139.00	\$150.88	\$128.39	\$114.34	\$129.12	\$143.02	\$153.78	\$154.99	\$155.96	\$177.28	\$131.91	\$162.20
ADR Lamoille County, VT (Stowe)		\$191.36	\$209.54	\$173.84	\$132.10	\$163.79	\$167.16	\$190.86	\$196.55	\$189.97	\$198.93	\$147.15	\$208.15
ADR Volusia County, FL (Daytona Beach)		\$113.70	\$145.40	\$141.80	\$122.04	\$111.95	\$121.01	\$131.57	\$101.19	\$92.29	\$102.35	\$97.54	\$94.24
Warren County YOY Change		3%	5%	3%	2%	3%	-2%	0%	5%	-1%	2%	4%	1%
Essex County YOY Change		3%	6%	4%	3%	3%	-1%	1%	5%	-2%	2%	4%	1%
Saratoga County YOY Change		1%	0%	1%	0%	-1%	-3%	5%	2%	-3%	-1%	1%	-1%
Albany County YOY Change		-1%	3%	6%	1%	1%	-2%	0%	-1%	0%	-1%	0%	1%
Dauphin County YOY Change		2%	1%	1%	-1%	0%	-3%	0%	0%	-3%	-1%	0%	-1%
Finger Lakes, NY (Seneca, Cayuga, Yates) YOY Change		1%	0%	3%	-2%	1%	-1%	-2%	0%	-5%	2%	-2%	1%
Barnstable County, MA (Cape Cod) YOY Change		6%	5%	6%	6%	5%	5%	6%	5%	2%	2%	6%	22%
Rockingham County, NH (Hampton Beach) YOY Change		4%	2%	1%	1%	2%	3%	5%	7%	5%	0%	-7%	2%
Atlantic County, NJ (Atlantic City) YOY Change		13%	12%	11%	37%	42%	2%	-3%	-3%	-4%	-2%	-2%	31%
Jefferson County, NY (1000 Islands) YOY Change		2%	2%	2%	1%	3%	-1%	1%	4%	0%	3%	4%	2%
Grafton County, VT (Woodstock) YOY Change		2%	1%	0%	1%	5%	1%	1%	2%	0%	5%	2%	-1%
Rutland County, VT Yearly YOY Change		5%	-1%	0%	2%	0%	0%	3%	2%	-2%	3%	1%	2%
Lamoille County, VT (Stowe) YOY Change		0%	-2%	-1%	-2%	3%	2%	4%	2%	0%	2%	3%	2%
Volusia County, FL (Daytona Beach) YOY Change		1%	1%	2%	4%	3%	4%	1%	-1%	-6%	-3%	-1%	-3%

RevPAR Table

The table on the right is a screenshot of a dynamic pivot table that tracks RevPAR data from 2012 – March 2022.

Similar to the ADR data, in 2019 Warren County’s RevPAR data performance among the average between the competitive set but performs near the top of the set in July and August.

In July and August of 2019, Barnstable County had the highest RevPars among the competitive set with \$246 in July and \$263 in August.

RevPAR by Month In A Selected Year With Year-Over-Year Change													
Year	2019												
	Month												
Destination/Competitor	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Monthly Average
RevPAR Warren County, NY	\$43.40	\$60.83	\$49.73	\$48.02	\$60.21	\$83.97	\$127.88	\$141.32	\$81.08	\$72.40	\$53.24	\$52.09	\$72.85
RevPAR Essex County, NY	\$44.41	\$64.42	\$49.58	\$47.83	\$61.74	\$93.05	\$150.33	\$168.28	\$88.92	\$76.78	\$53.81	\$55.19	\$79.53
RevPAR Saratoga County, NY	\$47.36	\$57.42	\$64.35	\$71.05	\$82.04	\$91.87	\$129.24	\$162.87	\$93.54	\$89.65	\$68.45	\$49.28	\$83.93
RevPAR Albany County, NY	\$47.09	\$60.92	\$72.81	\$66.50	\$73.37	\$74.65	\$86.58	\$91.67	\$73.46	\$78.53	\$58.67	\$45.27	\$69.13
RevPAR Dauphin County, PA (Hershey)	\$44.62	\$58.79	\$60.52	\$72.61	\$77.77	\$103.34	\$109.33	\$115.24	\$71.86	\$80.60	\$58.88	\$47.66	\$75.10
RevPAR Finger Lakes, NY (Seneca, Cayuga, Yates)	\$32.07	\$39.70	\$47.31	\$52.28	\$71.52	\$74.14	\$81.80	\$96.48	\$70.01	\$78.23	\$48.02	\$34.62	\$60.51
RevPAR Barnstable County, MA (Cape Cod)	\$28.23	\$39.68	\$37.65	\$49.64	\$79.32	\$146.76	\$246.70	\$263.81	\$134.08	\$82.89	\$49.29	\$40.09	\$99.85
RevPAR Rockingham County, NH (Hampton Beach)	\$47.63	\$55.58	\$56.90	\$62.76	\$82.57	\$99.04	\$114.16	\$119.54	\$99.82	\$103.54	\$68.47	\$56.21	\$80.52
RevPAR Atlantic County, NJ (Atlantic City)	\$41.51	\$53.42	\$61.60	\$70.06	\$81.17	\$98.13	\$111.89	\$113.10	\$85.14	\$74.29	\$69.03	\$64.82	\$77.01
RevPAR Jefferson County, NY (1000 Islands)	\$34.97	\$45.93	\$41.77	\$42.97	\$54.33	\$71.10	\$100.26	\$108.68	\$68.11	\$62.41	\$45.69	\$38.91	\$59.59
RevPAR Grafton County, VT (Woodstock)	\$57.11	\$80.98	\$60.45	\$55.78	\$67.20	\$101.35	\$126.40	\$134.14	\$104.80	\$123.59	\$67.28	\$65.22	\$87.03
RevPAR Rutland County, VT	\$68.21	\$90.96	\$67.67	\$51.71	\$70.11	\$90.71	\$110.65	\$114.72	\$110.11	\$130.81	\$66.13	\$83.95	\$87.98
RevPAR Lamoille County, VT (Stowe)	\$97.28	\$131.80	\$101.73	\$68.89	\$93.66	\$113.70	\$149.05	\$161.96	\$142.49	\$153.68	\$80.64	\$108.03	\$116.91
RevPAR Volusia County, FL (Daytona Beach)	\$63.98	\$98.69	\$114.88	\$87.47	\$73.43	\$88.75	\$97.96	\$56.39	\$40.61	\$53.95	\$53.50	\$46.89	\$73.04
Warren County, NY YOY Change	3%	3%	1%	3%	2%	-2%	5%	6%	-4%	-1%	12%	1%	2%
Essex County, NY YOY Change	2%	4%	0%	3%	2%	-3%	4%	7%	-5%	-2%	12%	1%	2%
Saratoga County, NY YOY Change	2%	2%	5%	-2%	1%	-5%	10%	2%	1%	-1%	12%	3%	3%
Albany County, NY YOY Change	-9%	0%	12%	-1%	0%	-3%	6%	0%	4%	-3%	6%	7%	2%
Dauphin County, PA (Hershey) YOY Change	-4%	-5%	-5%	-1%	2%	-5%	5%	4%	-7%	-6%	-1%	0%	-2%
Finger Lakes, NY (Seneca, Cayuga, Yates) YOY Change	3%	2%	9%	-9%	1%	-7%	0%	1%	-11%	6%	-2%	6%	0%
Barnstable County, MA (Cape Cod) YOY Change	-11%	-4%	-16%	-4%	1%	1%	4%	2%	-6%	-3%	5%	16%	-1%
Rockingham County, NH (Hampton Beach) YOY Change	-4%	-4%	-7%	-5%	1%	2%	7%	9%	0%	-13%	-23%	-2%	-3%
Atlantic County, NJ (Atlantic City) YOY Change	6%	10%	9%	32%	37%	-3%	-4%	-5%	-8%	2%	3%	32%	9%
Jefferson County, NY (1000 Islands) YOY Change	1%	-1%	-1%	1%	2%	-1%	6%	4%	-4%	0%	8%	2%	1%
Grafton County, VT (Woodstock) YOY Change	3%	1%	1%	-5%	2%	-5%	3%	4%	0%	5%	0%	-2%	1%
Rutland County, VT YOY Change	11%	4%	3%	-2%	6%	-1%	7%	2%	0%	2%	-1%	3%	3%
Lamoille County, VT (Stowe) YOY Change	3%	2%	1%	-4%	4%	5%	6%	3%	2%	4%	5%	1%	3%
Volusia County, FL (Daytona Beach) YOY Change	5%	-2%	4%	5%	12%	4%	-3%	-13%	-24%	-4%	7%	-1%	-1%

Occupancy Table

The table on the right is a screenshot of a dynamic pivot table that tracks occupancy data from 2012 – March 2022.

Rockingham County, Lamoille County and Saratoga County were the top three performers in 2019, followed closely by Albany County, Volusia County and Dauphin County.

The majority of year-over-year changes were negative between 2018 and 2019 but Saratoga County, Albany County, Rutland County and Lamoille County all showed slightly positive increases.

Occupancy by Month In A Selected Year With Year-Over-Year Change														
Year	2019													
Destination/Competitor	Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Monthly Average
	Occupancy Warren County	37%	45%	44%	45%	51%	63%	76%	79%	60%	57%	47%	39%	54%
Occupancy Essex County	35%	44%	41%	43%	49%	62%	75%	80%	59%	55%	45%	37%	52%	
Occupancy Saratoga County	44%	52%	58%	61%	65%	71%	77%	83%	72%	70%	59%	46%	63%	
Occupancy Albany County	45%	55%	63%	60%	63%	67%	73%	76%	66%	69%	56%	46%	62%	
Occupancy Dauphin County	44%	55%	56%	64%	64%	75%	76%	79%	62%	65%	53%	43%	61%	
Occupancy Finger Lakes, NY (Seneca, Cayuga, Yates)	35%	41%	46%	50%	58%	63%	70%	75%	61%	65%	47%	37%	54%	
Occupancy Barnstable County, MA (Cape Cod)	23%	30%	30%	35%	45%	62%	75%	78%	62%	49%	35%	27%	46%	
Occupancy Rockingham County, NH (Hampton Beach)	47%	53%	56%	60%	69%	77%	78%	80%	73%	75%	61%	50%	65%	
Occupancy Atlantic County, NJ (Atlantic City)	45%	55%	60%	57%	61%	70%	81%	83%	63%	56%	55%	50%	61%	
Occupancy Jefferson County, NY (1000 Islands)	36%	43%	43%	46%	52%	63%	74%	77%	59%	57%	47%	38%	53%	
Occupancy Grafton County, VT (Woodstock)	42%	54%	47%	44%	49%	63%	73%	79%	67%	72%	49%	45%	57%	
Occupancy Rutland County, VT	49%	60%	53%	45%	54%	63%	72%	74%	71%	74%	50%	52%	60%	
Occupancy Lamoille County, VT (Stowe)	51%	63%	59%	52%	57%	68%	78%	82%	75%	77%	55%	52%	64%	
Occupancy Volusia County, FL (Daytona Beach)	56%	68%	81%	72%	66%	73%	75%	56%	44%	53%	55%	50%	62%	
Warren County YOY Change	0%	-1%	-1%	0%	-1%	0%	3%	1%	-2%	-1%	3%	0%	0%	
Essex County YOY Change	0%	-1%	-2%	0%	-1%	-1%	3%	1%	-2%	-2%	3%	0%	0%	
Saratoga County YOY Change	0%	1%	2%	-1%	1%	-1%	3%	0%	3%	0%	6%	2%	1%	
Albany County YOY Change	-4%	-2%	3%	-1%	-1%	-1%	4%	1%	3%	-1%	3%	3%	1%	
Dauphin County YOY Change	-3%	-4%	-3%	0%	1%	-1%	4%	3%	-2%	-3%	-1%	1%	-1%	
Finger Lakes, NY (Seneca, Cayuga, Yates) YOY Change	1%	1%	2%	-4%	0%	-4%	1%	1%	-4%	3%	0%	2%	0%	
Barnstable County, MA (Cape Cod) YOY Change	-4%	-3%	-8%	-4%	-2%	-3%	-2%	-2%	-5%	-2%	0%	-1%	-3%	
Rockingham County, NH (Hampton Beach) YOY Change	-4%	-3%	-5%	-4%	-1%	-1%	1%	2%	-4%	-11%	-13%	-2%	-4%	
Atlantic County, NJ (Atlantic City) YOY Change	-3%	-1%	-1%	-3%	-2%	-4%	-1%	-2%	-3%	2%	3%	1%	-1%	
Jefferson County, NY (1000 Islands) YOY Change	-1%	-1%	-1%	0%	-1%	0%	4%	0%	-3%	-2%	2%	0%	0%	
Grafton County, VT (Woodstock) YOY Change	0%	0%	0%	-3%	-1%	-4%	1%	1%	0%	0%	-1%	0%	-1%	
Rutland County, VT YOY Change	3%	3%	2%	-2%	3%	-1%	3%	0%	1%	-1%	-1%	1%	1%	
Lamoille County, VT (Stowe) YOY Change	1%	3%	2%	-1%	0%	2%	2%	1%	1%	1%	1%	-1%	1%	
Volusia County, FL (Daytona Beach) YOY Change	2%	-2%	2%	1%	6%	0%	-3%	-7%	-10%	-1%	5%	1%	-1%	

Room Night Demand Table

The table on the right is a screenshot of a dynamic pivot table that tracks room night demand data from 2012 – March 2022.

Atlantic County and Volusia County had the highest room demand in 2019. Atlantic County’s average monthly demand was over 430,000 while Volusia County’s was nearly 250,000. Warren County’s monthly average was just over 96,000.

Saratoga County, Albany County, Dauphin County and Atlantic County showed the highest positive growth in demand between 2018 and 2019 with growth rates between three and four percent.

Demand by Month In A Selected Year With Year-Over-Year Change													
Year	2019												
	Month												
Destination/Competitor	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Monthly Average
Demand Warren County, NY	45,250	51,103	54,946	63,961	109,739	134,848	166,172	174,691	128,108	115,132	62,740	48,206	96,241
Demand Essex County, NY	24,735	27,722	29,109	28,886	34,804	42,827	53,514	56,961	40,627	39,561	30,796	26,285	36,319
Demand Saratoga County, NY	49,631	53,489	65,383	69,101	76,574	80,894	91,265	97,807	82,268	83,404	64,914	51,422	72,179
Demand Albany County, NY	102,424	111,130	141,831	131,287	142,474	146,637	164,414	170,611	143,414	158,963	124,854	105,199	136,937
Demand Dauphin County, PA (Hershey)	118,338	135,448	152,157	169,615	175,645	202,208	213,251	222,158	169,873	185,800	144,580	122,803	167,656
Demand Finger Lakes, NY (Seneca, Cayuga, Yates)	15,844	17,151	21,145	23,482	27,694	29,470	33,766	36,110	28,446	31,464	21,255	17,242	25,256
Demand Barnstable County, MA (Cape Cod)	46,399	57,254	66,343	102,343	157,487	207,114	263,721	272,089	210,042	167,202	83,250	55,491	140,728
Demand Rockingham County, NH (Hampton Beach)	66,912	68,510	80,273	83,854	110,263	118,968	124,369	127,270	110,251	113,739	85,062	74,526	97,000
Demand Atlantic County, NJ (Atlantic City)	318,394	350,626	422,259	397,273	434,177	488,826	583,897	596,151	437,509	403,453	376,961	357,031	430,546
Demand Jefferson County, NY (1000 Islands)	23,513	25,676	28,347	30,018	42,234	50,113	61,114	63,355	46,868	45,919	29,990	24,507	39,305
Demand Grafton County, VT (Woodstock)	46,597	54,472	52,557	48,447	57,349	71,424	85,910	92,692	76,346	84,632	54,534	50,768	64,644
Demand Rutland County, VT	36,448	40,445	39,149	32,290	39,976	45,496	53,332	55,435	51,170	55,265	36,033	38,444	43,624
Demand Lamoille County, VT (Stowe)	30,053	33,586	34,595	29,602	33,540	38,915	46,167	48,713	42,912	45,671	31,320	30,649	37,144
Demand Volusia County, FL (Daytona Beach)	227,784	248,174	328,122	284,029	268,592	290,616	304,865	228,190	174,352	215,598	216,921	203,349	249,216
Warren County, NY YOY Change	-1%	-2%	-3%	2%	1%	0%	4%	1%	-2%	-2%	7%	1%	0%
Essex County, NY YOY Change	-1%	-2%	-3%	0%	-1%	-1%	4%	2%	-3%	-3%	8%	0%	0%
Saratoga County, NY YOY Change	0%	6%	7%	2%	2%	-1%	5%	0%	4%	0%	11%	4%	3%
Albany County, NY YOY Change	-6%	-1%	8%	1%	2%	2%	9%	3%	6%	1%	8%	9%	3%
Dauphin County, PA (Hershey) YOY Change	-2%	0%	1%	5%	6%	3%	12%	9%	2%	0%	4%	7%	4%
Finger Lakes, NY (Seneca, Cayuga, Yates) YOY Change	2%	1%	6%	-7%	0%	-5%	1%	2%	-6%	5%	0%	6%	0%
Barnstable County, MA (Cape Cod) YOY Change	-18%	-10%	-21%	-9%	-4%	-5%	-3%	-3%	-8%	-4%	0%	-6%	-8%
Rockingham County, NH (Hampton Beach) YOY Change	-6%	-3%	-6%	-4%	1%	1%	3%	4%	-4%	-12%	-16%	-1%	-3%
Atlantic County, NJ (Atlantic City) YOY Change	8%	13%	12%	11%	12%	-6%	-2%	-3%	-5%	3%	4%	1%	4%
Jefferson County, NY (1000 Islands) YOY Change	-2%	-3%	-3%	0%	-2%	0%	5%	0%	-5%	-3%	3%	-2%	-1%
Grafton County, VT (Woodstock) YOY Change	4%	4%	5%	-2%	-2%	-5%	3%	4%	2%	2%	0%	1%	1%
Rutland County, VT YOY Change	6%	6%	3%	-5%	5%	-2%	5%	0%	2%	-1%	-2%	2%	2%
Lamoille County, VT (Stowe) YOY Change	3%	4%	3%	-3%	1%	3%	2%	1%	1%	2%	2%	-1%	1%
Volusia County, FL (Daytona Beach) YOY Change	7%	0%	3%	3%	12%	2%	-1%	-8%	-16%	2%	11%	4%	1%

Inventory Table

The table on the right is a screenshot of a dynamic pivot table that tracks inventory for Warren County and its competitors in a selected year.

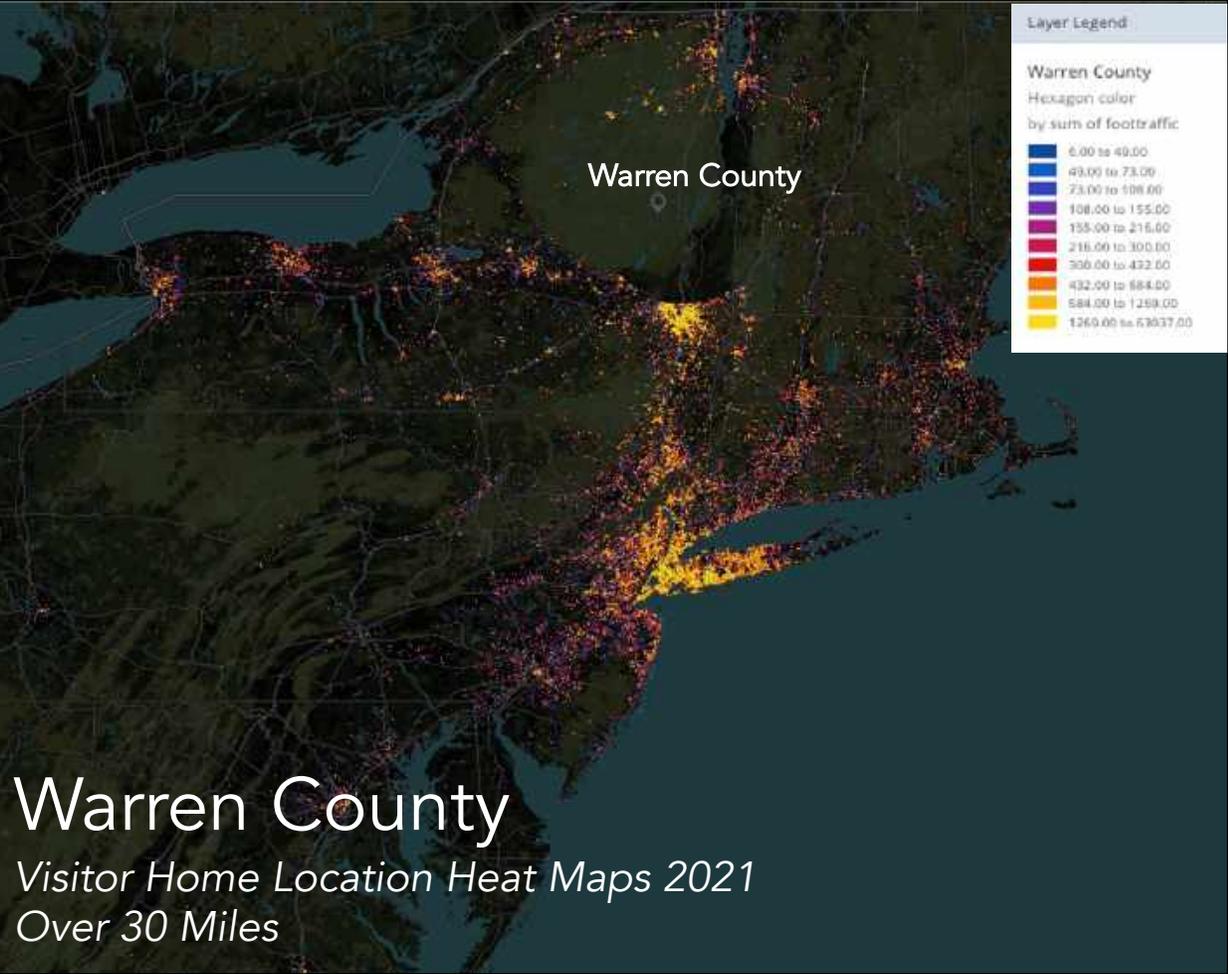
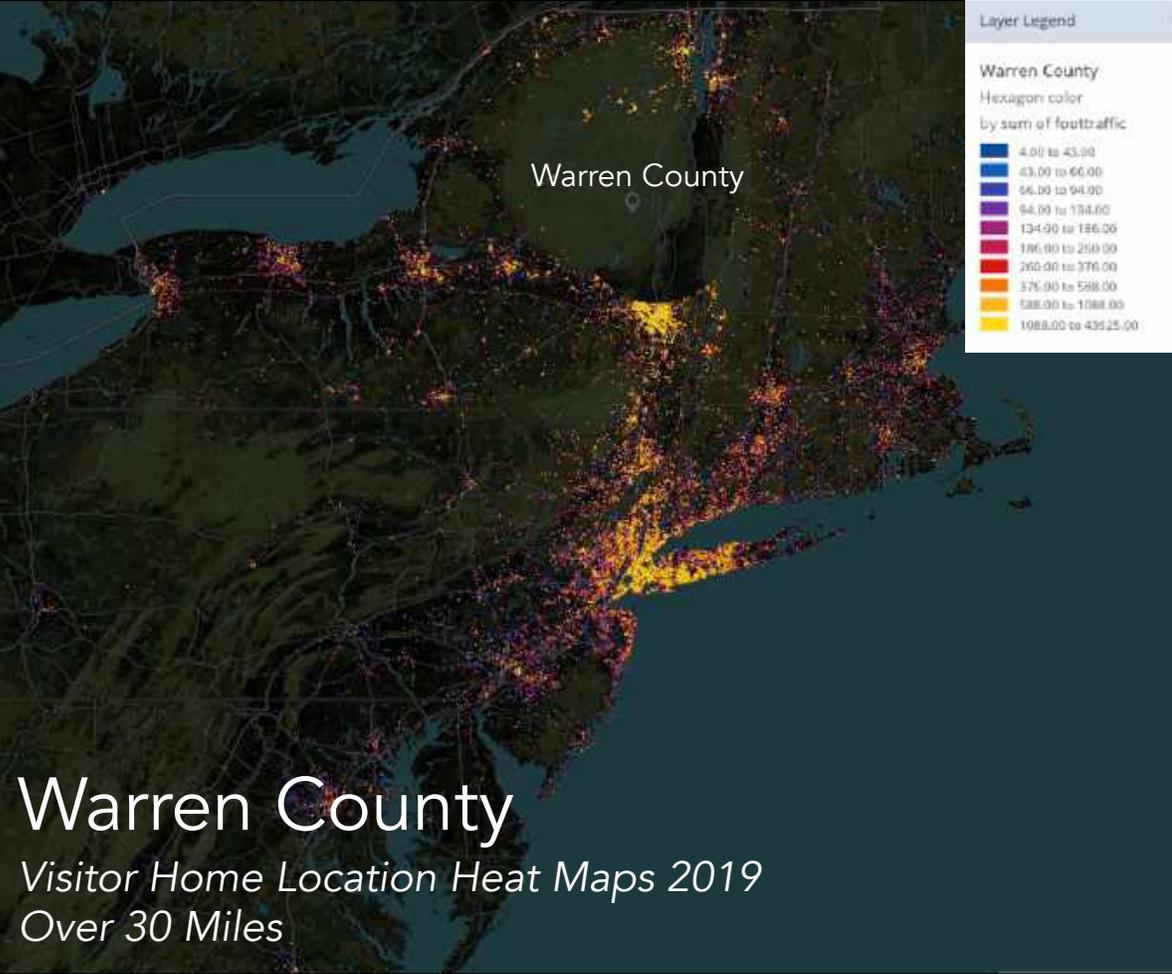
Analyzing inventory trends will allow Warren County to see development activity in competitive destinations.

Atlantic City and Volusia County have the highest room night supply available. Atlantic City's supply in 2019 was over triple the amount of Warren County's supply.

Inventory by Month In A Selected Year												
Year	2019											
	Months											
Inventory County/Destination	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Warren County, NY	7,163	7,163	7,163	7,163	7,163	7,139	7,139	7,139	7,205	7,205	7,107	7,107
Essex County, NY	2,345	2,345	2,345	2,345	2,345	2,345	2,345	2,345	2,345	2,345	2,345	2,345
Saratoga County, NY	3,826	3,826	3,826	3,826	3,826	3,826	3,826	3,825	3,825	3,825	3,825	3,825
Albany County, NY	7,275	7,275	7,275	7,275	7,275	7,275	7,275	7,230	7,230	7,445	7,444	7,444
Dauphin County, PA (Hershey)	8,670	8,792	8,792	8,792	8,838	8,950	9,073	9,072	9,179	9,178	9,178	9,178
Finger Lakes, NY (Seneca, Cayuga, Yates)	1,550	1,550	1,550	1,550	1,550	1,550	1,550	1,550	1,550	1,561	1,561	1,561
Barnstable County, MA (Cape Cod)	11,345	11,345	11,345	11,345	11,345	11,344	11,344	11,344	11,344	11,344	11,444	11,444
Rockingham County, NH (Hampton Beach)	5,142	5,153	5,153	5,167	5,167	5,167	5,127	5,127	5,127	5,097	5,097	5,253
Atlantic County, NJ (Atlantic City)	23,144	23,144	23,144	23,144	23,144	23,159	23,159	23,134	23,134	23,134	23,134	23,134
Jefferson County, NY (1000 Islands)	2,660	2,650	2,650	2,650	2,650	2,650	2,650	2,650	2,650	2,650	2,650	2,627
Grafton County, VT (Woodstock)	3,780	3,824	3,824	3,824	3,824	3,824	3,824	3,804	3,804	3,804	3,803	3,803
Rutland County, VT	2,416	2,416	2,416	2,416	2,416	2,416	2,416	2,416	2,416	2,416	2,416	2,416
Lamoille County, VT (Stowe)	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,907	1,905	1,905
Volusia County, FL (Daytona Beach)	13,316	13,316	13,323	13,467	13,467	13,467	13,467	13,467	13,467	13,453	13,441	13,441

Chapter 2: Warren County Destination Profile

Warren County Total Visitation

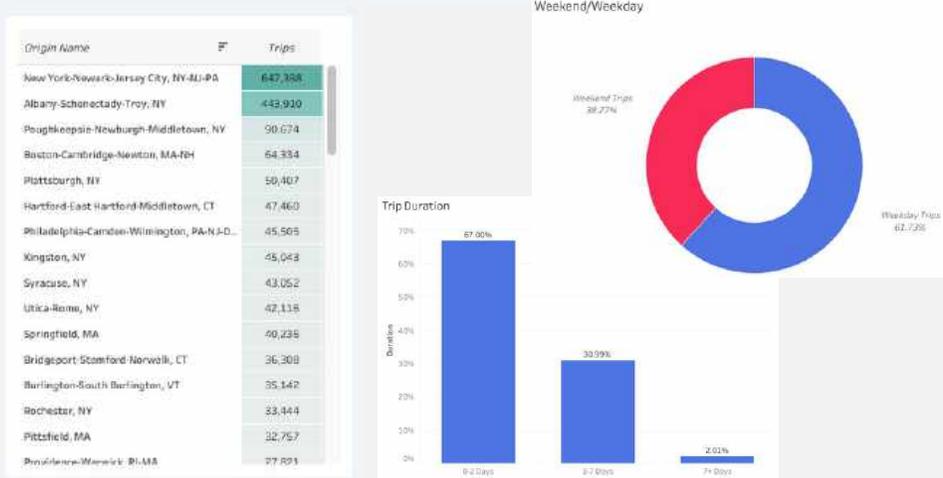
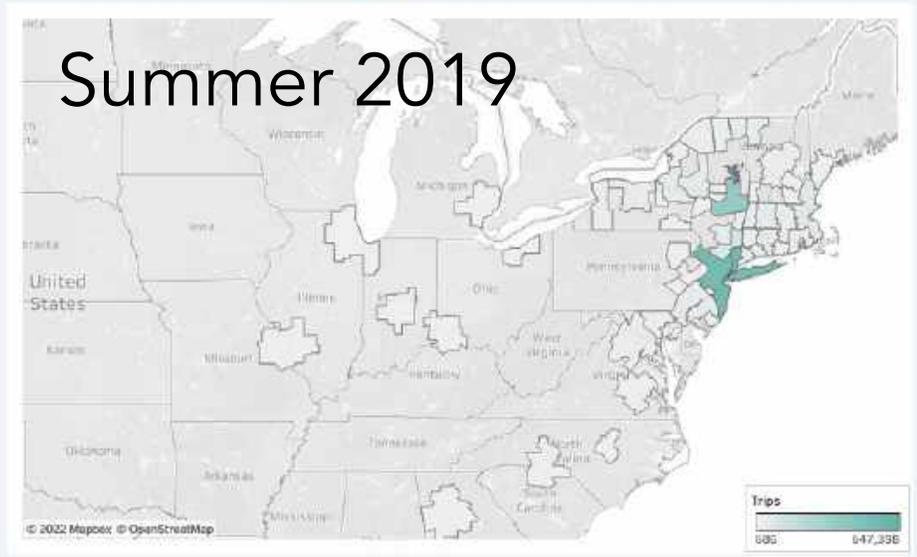


Warren County Summer v Winter Visitation 2019

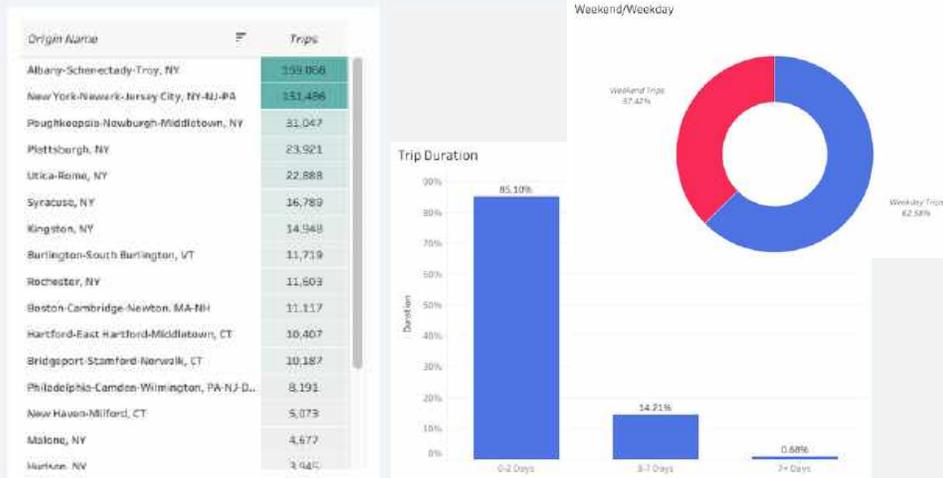
For summer and winter seasons, the largest market for Warren County tourism is the New York City market, followed by the nearby area of Albany-Schenectady-Troy, New York.

The largest market outside of New York during summer is the Boston area. With ski mountains being closer to Boston, Warren County pulls few visitors from the market during the winter.

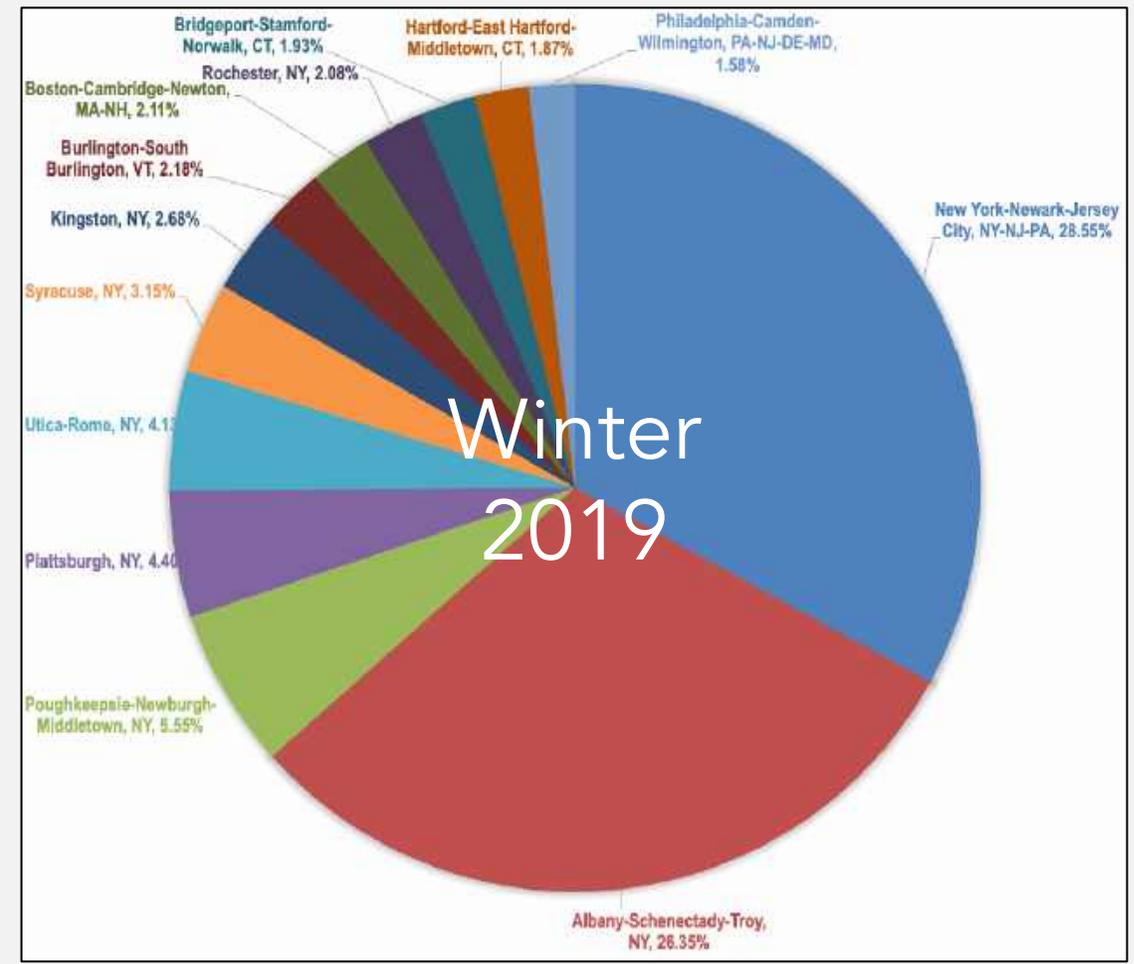
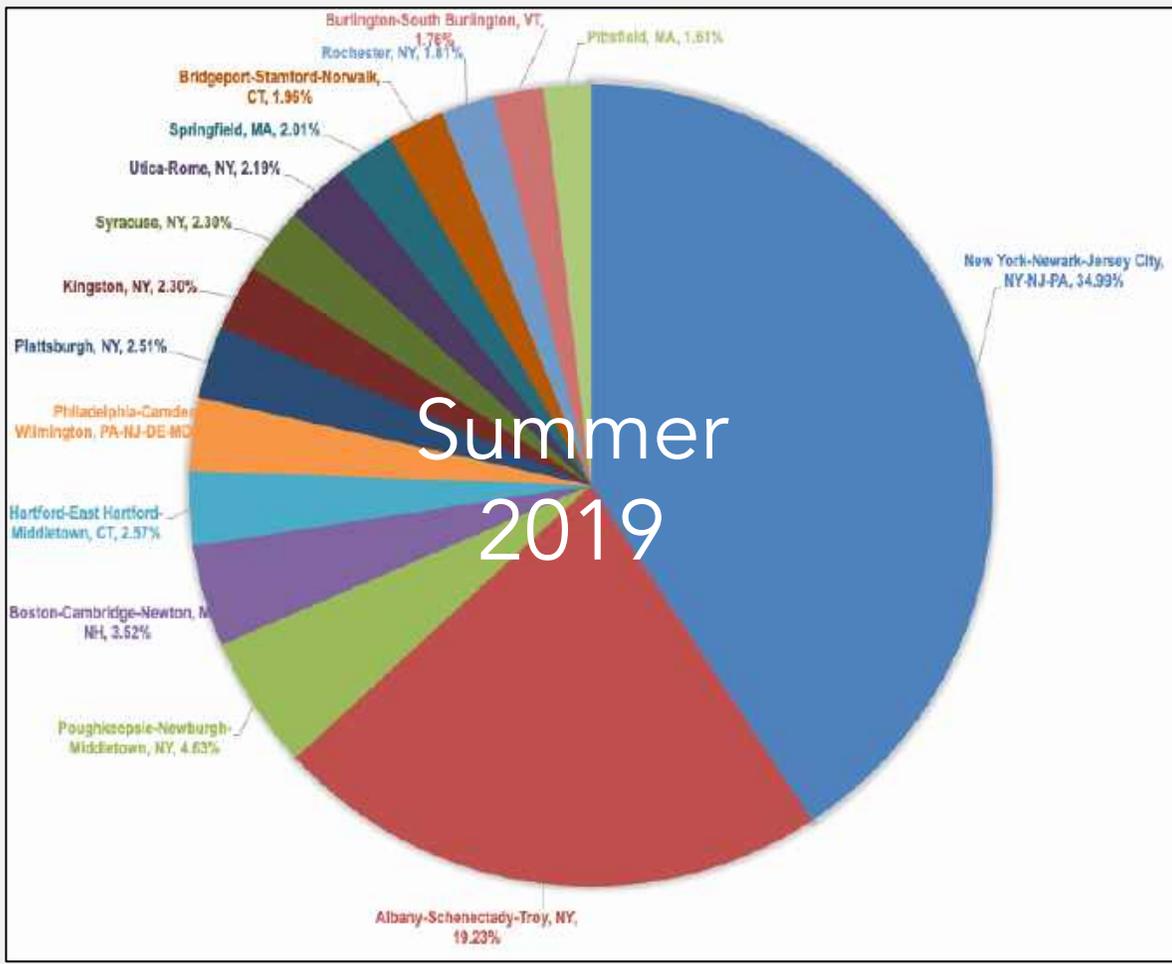
Number of Trips From Each MSA to Warren County Between Jun 2019 - Sep 2019



Number of Trips From Each MSA to Warren County Between Jan 2019 - Apr 2019



Warren County Summer v Winter Visitation 2019



The percentage of New York City visitors decreases during the winter and the area experiences more local visitation from Albany-Schenectady-Troy.

Warren County Summer v Winter Visitation 2021

The number of total New York City summer visitors increased by just over 100,000 visitors from 2019 to 2021. The number of visitors in the summer increased, while winter stays the same. Generally, the percentages of visitors from each area remained unchanged between the two years.

Number of Trips From Each MSA to Warren County Between Jun 2021 - Sep 2021



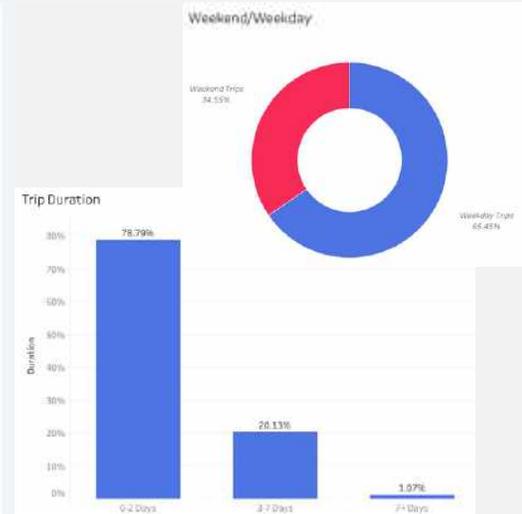
Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	730,583
Albany-Schenectady-Troy, NY	415,331
Poughkeepsie-Newburgh-Middletown, NY	105,689
Boston-Cambridge-Newton, MA-NH	63,666
Utica-Rome, NY	48,676
Philadelphia-Camden-Wilmington, PA-NJ-DC-MD	46,167
Kingston, NY	45,052
Syracuse, NY	45,255
Plattsburgh, NY	45,169
Hartford-East Hartford-Middletown, CT	45,163
Rochester, NY	42,851
Bridgeport-Stamford-Norwalk, CT	39,602
Springfield, MA	37,779
Burlington-South Burlington, VT	31,414
Buffalo-Cheektowaga, NY	29,571
Dorchester, MA	27,969



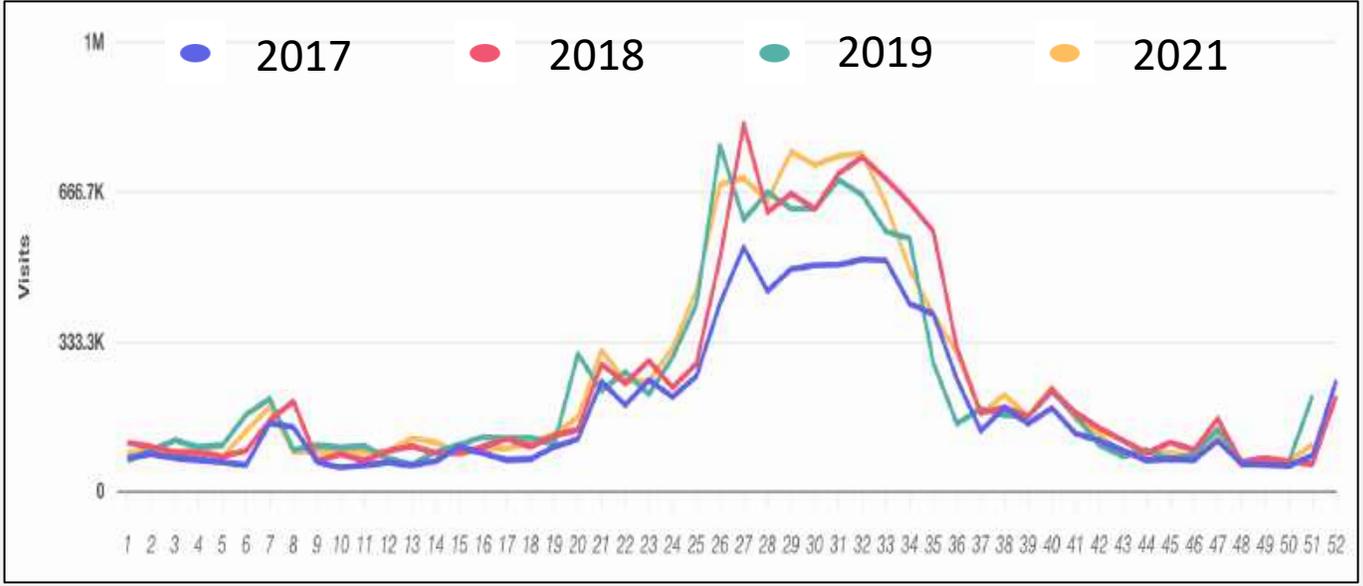
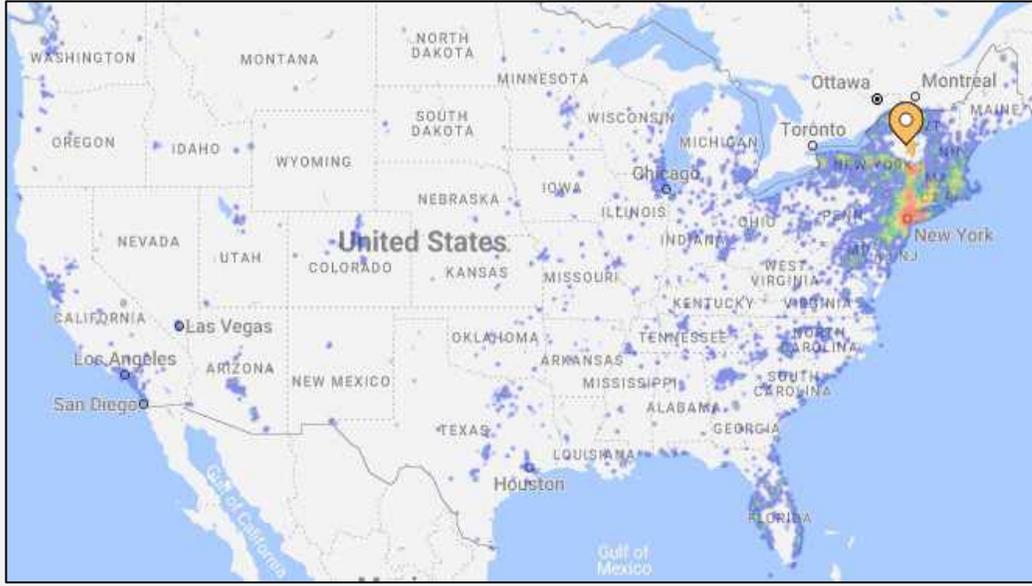
Number of Trips From Each MSA to Warren County Between Jan 2021 - Apr 2021



Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	154,893
Albany-Schenectady-Troy, NY	126,495
Poughkeepsie-Newburgh-Middletown, NY	21,961
Utica-Rome, NY	17,135
Plattsburgh, NY	13,279
Syracuse, NY	13,104
Kingston, NY	12,961
Rochester, NY	10,743
Bridgeport-Stamford-Norwalk, CT	8,623
Malone, NY	8,291
Philadelphia-Camden-Wilmington, PA-NJ-DC-MD	7,654
Hartford-East Hartford-Middletown, CT	6,659
Boston-Cambridge-Newton, MA-NH	6,016
New Haven-Milford, CT	3,940

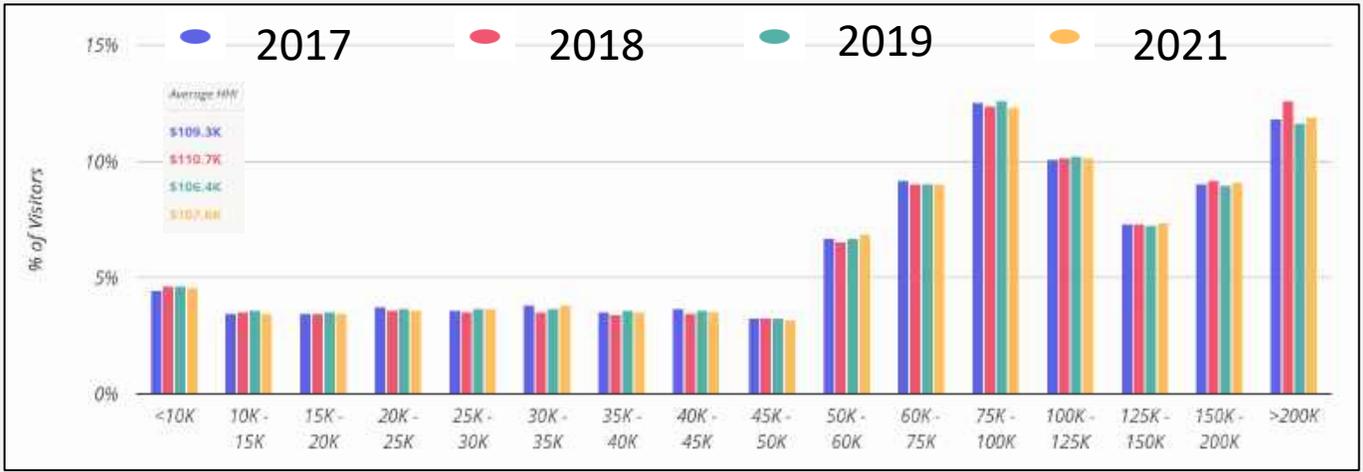


Warren County Total Visitation



Warren County Visitation			
Year	Vists	Unique Visits	Visit Frequency
2017	9,700,000	1,500,000	6.50
2018	12,500,000	2,000,000	6.23
2019	12,100,000	2,000,000	6.00
2021	12,600,000	2,100,000	6.09

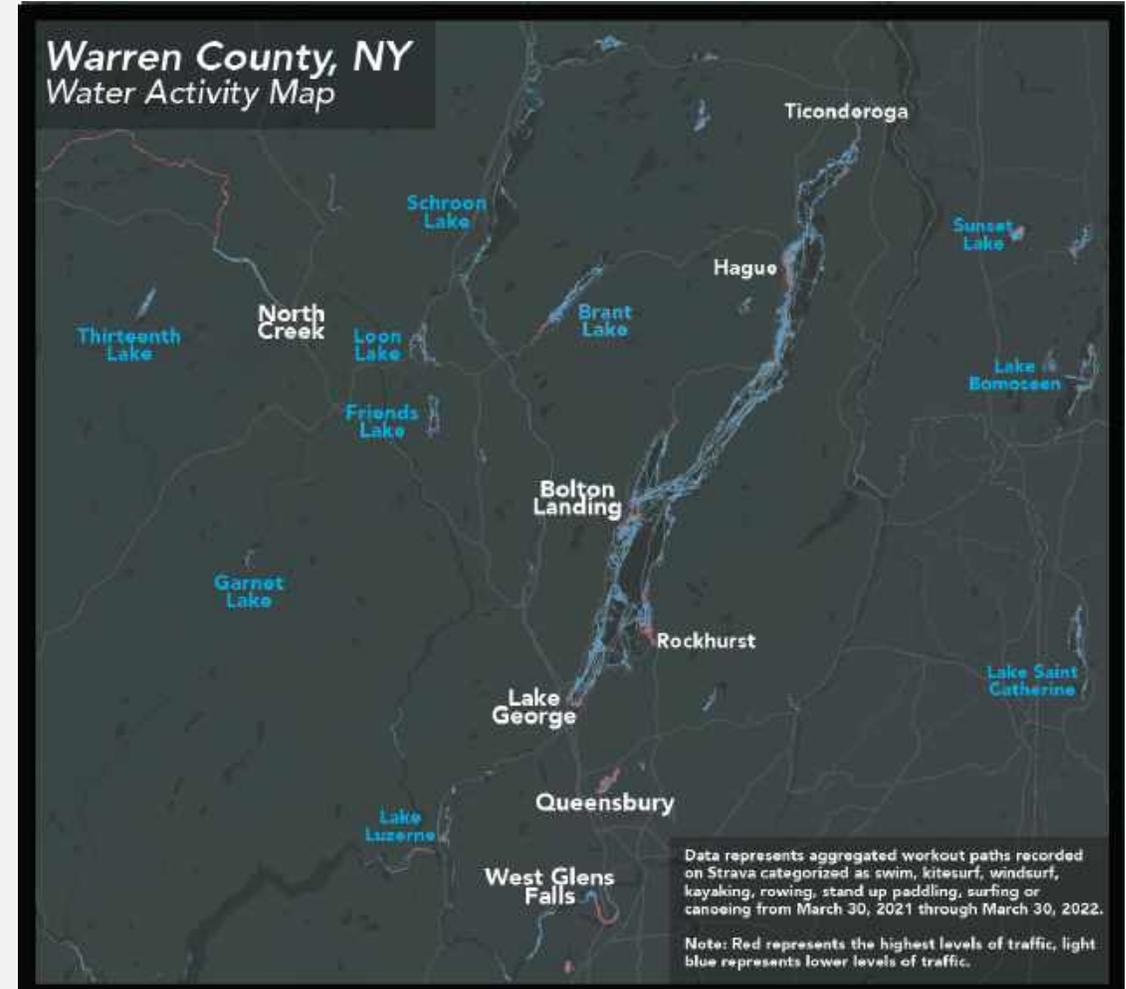
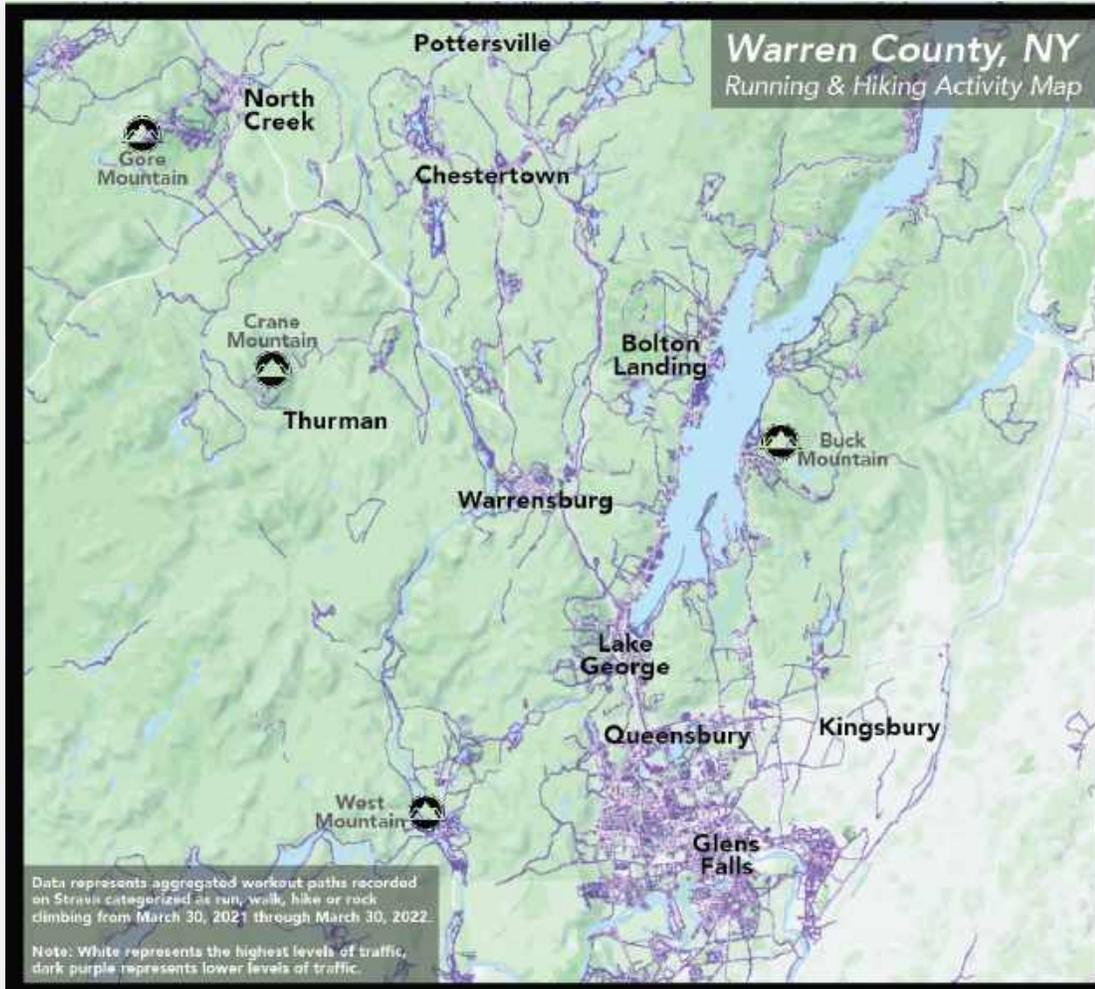
Source: Placer.ai



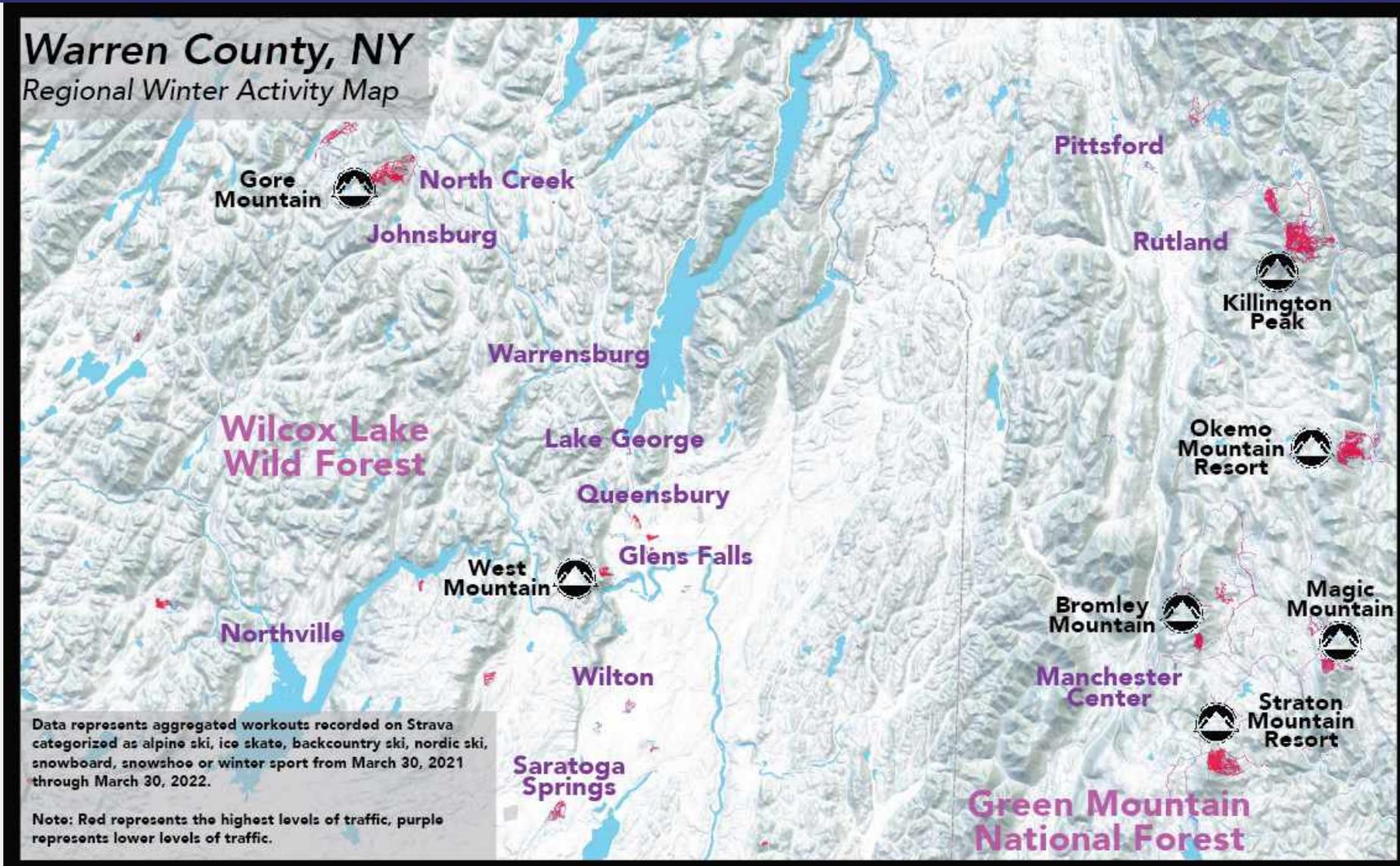
2020 was excluded to remove the impact of the COVID-19 pandemic.

Summer Activity Trail Maps

Warren County attracts many visitors seeking outdoor activities. The following graphics show the recorded workouts relating to running/hiking and water activities. Within each category umbrella, there are many exercises.

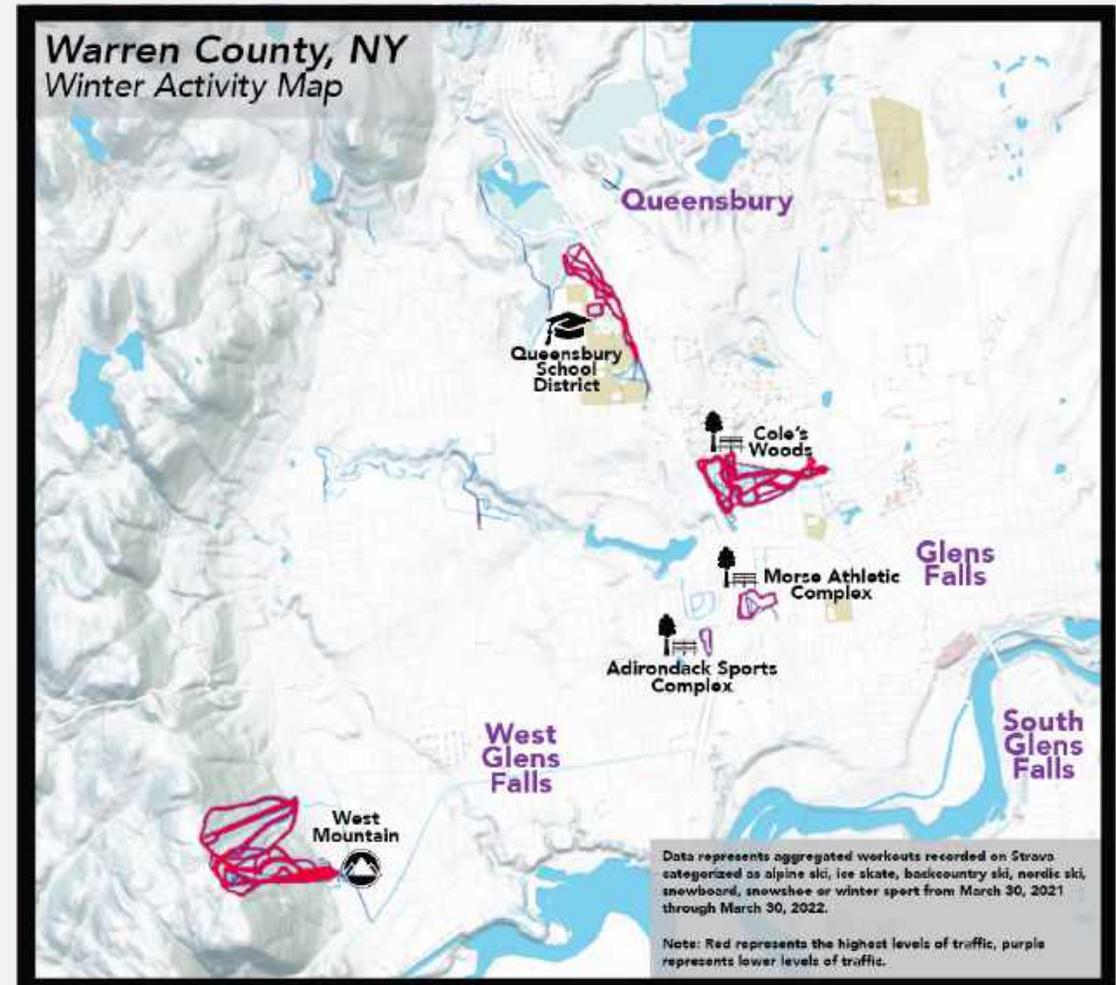
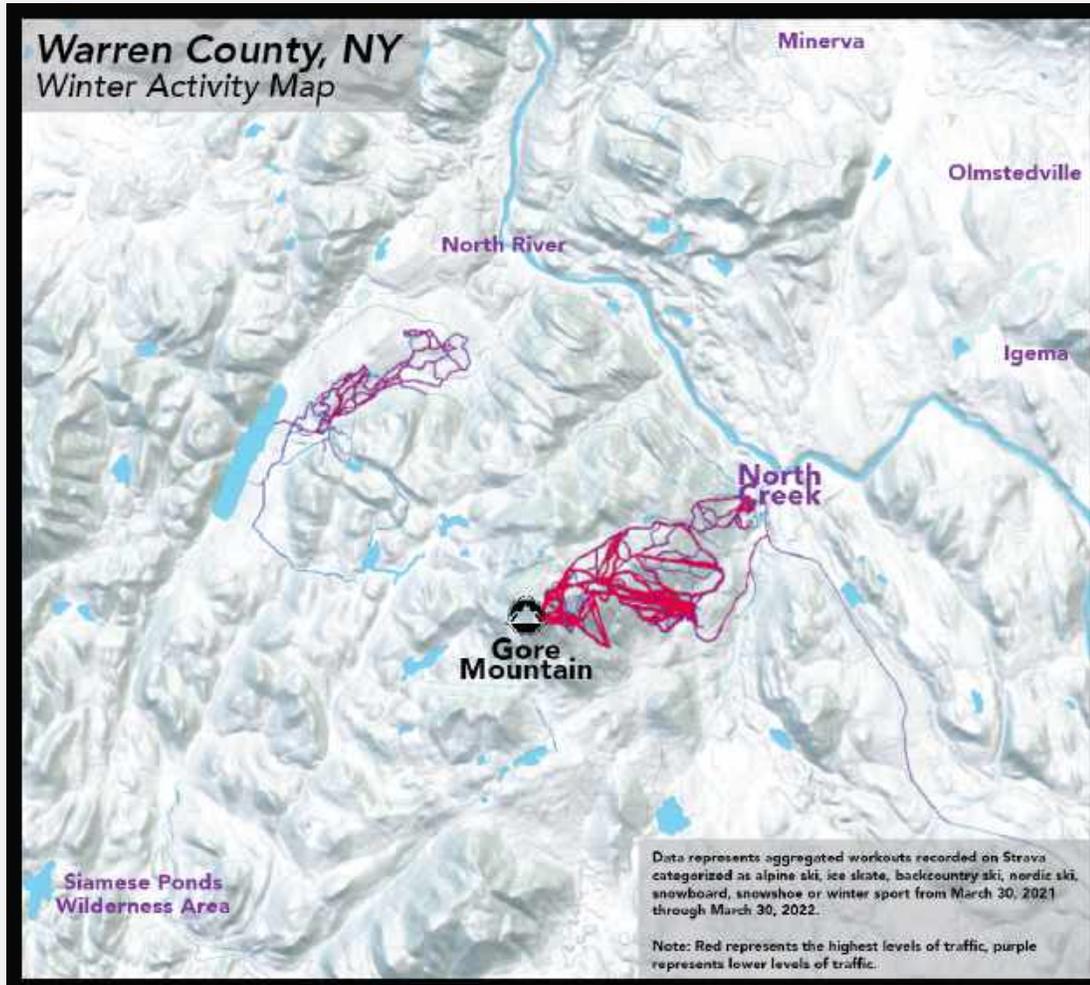


Regional Warren County Winter Activity Maps

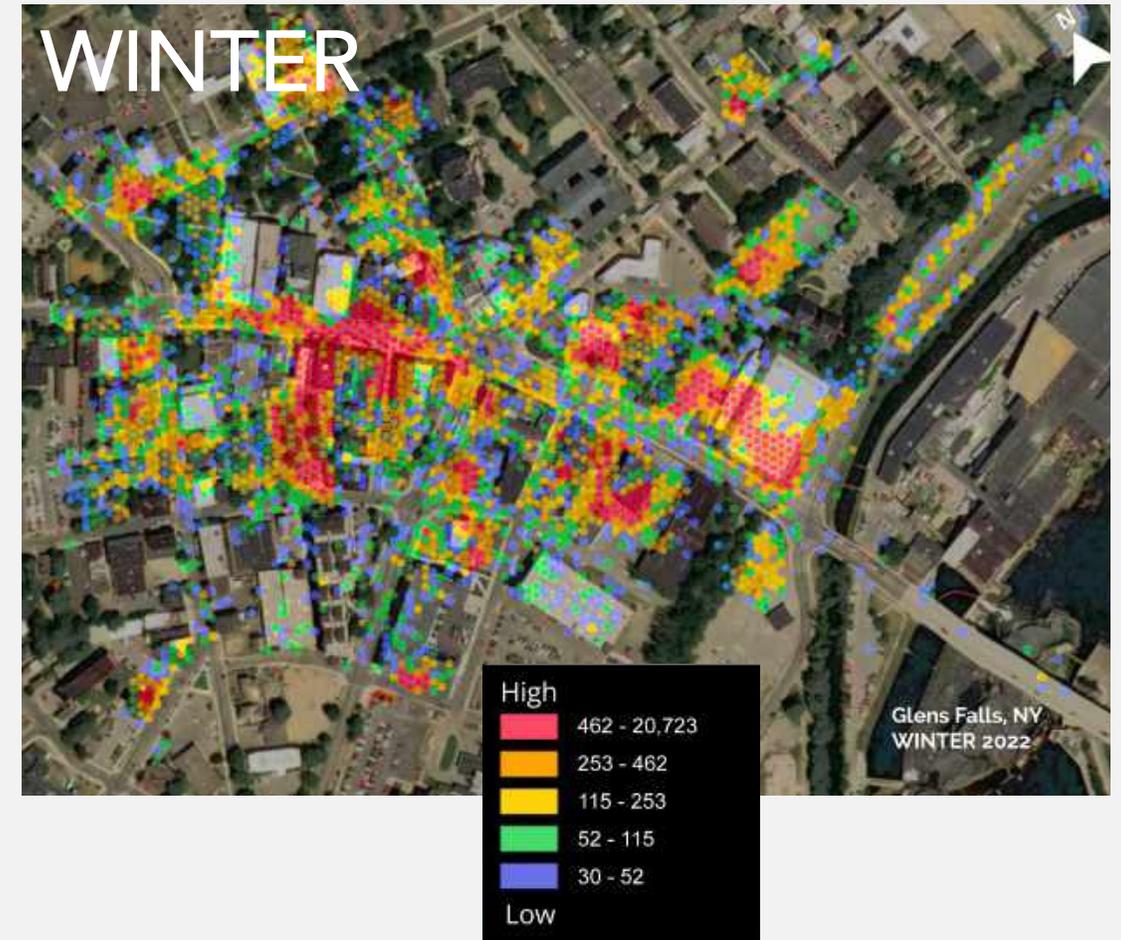
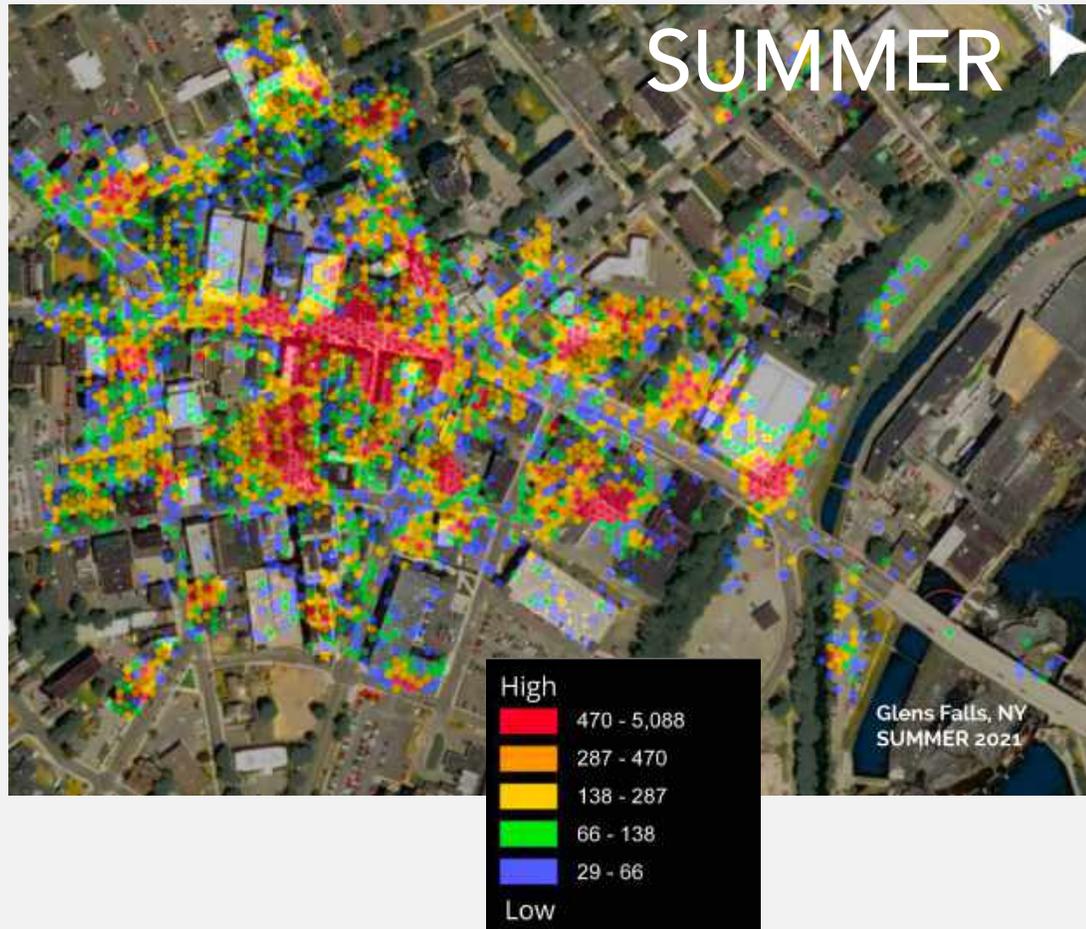


Warren County Winter Activity Maps

For a basis of comparison, the two graphics below show the areas where the majority of outdoor winter exercises are recorded in Warren County. The following slides will show how competitive destinations compare.

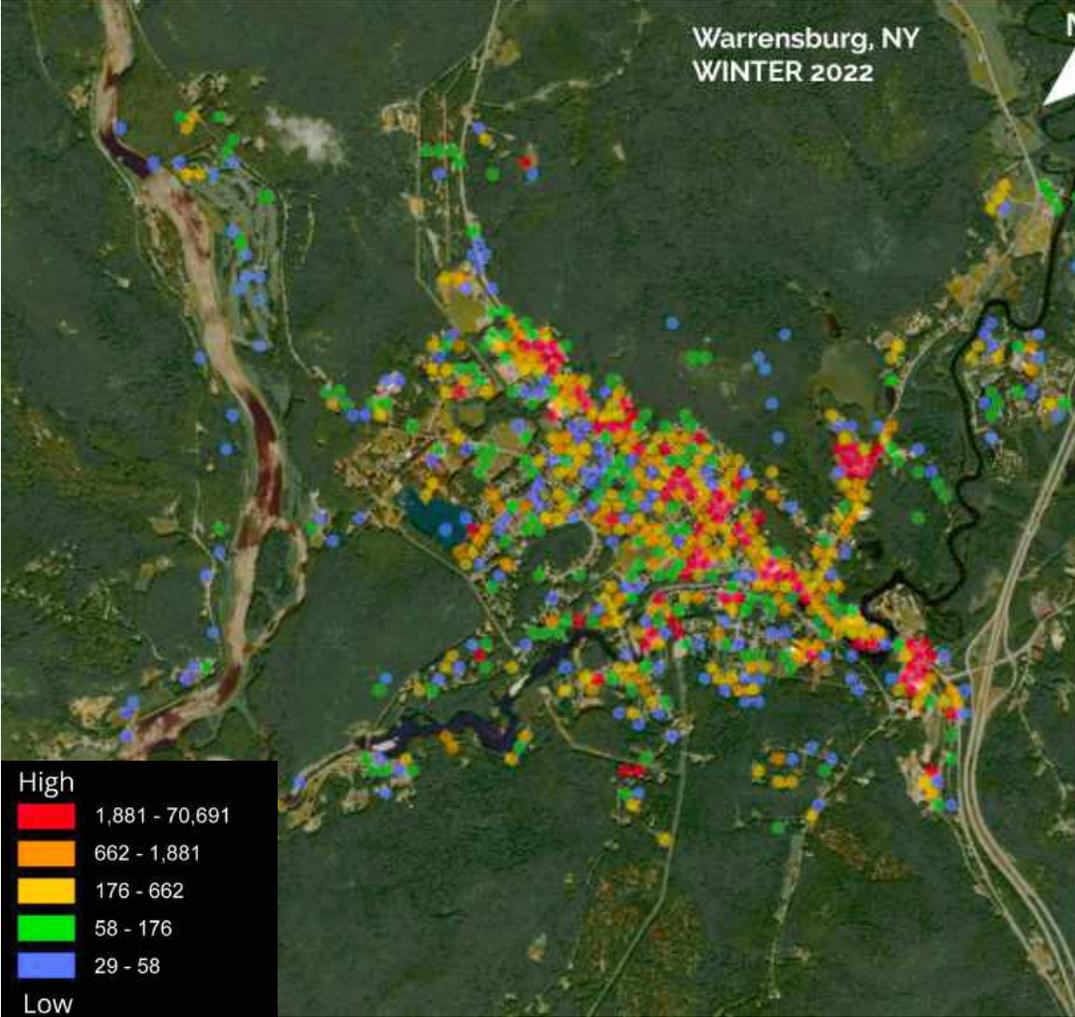
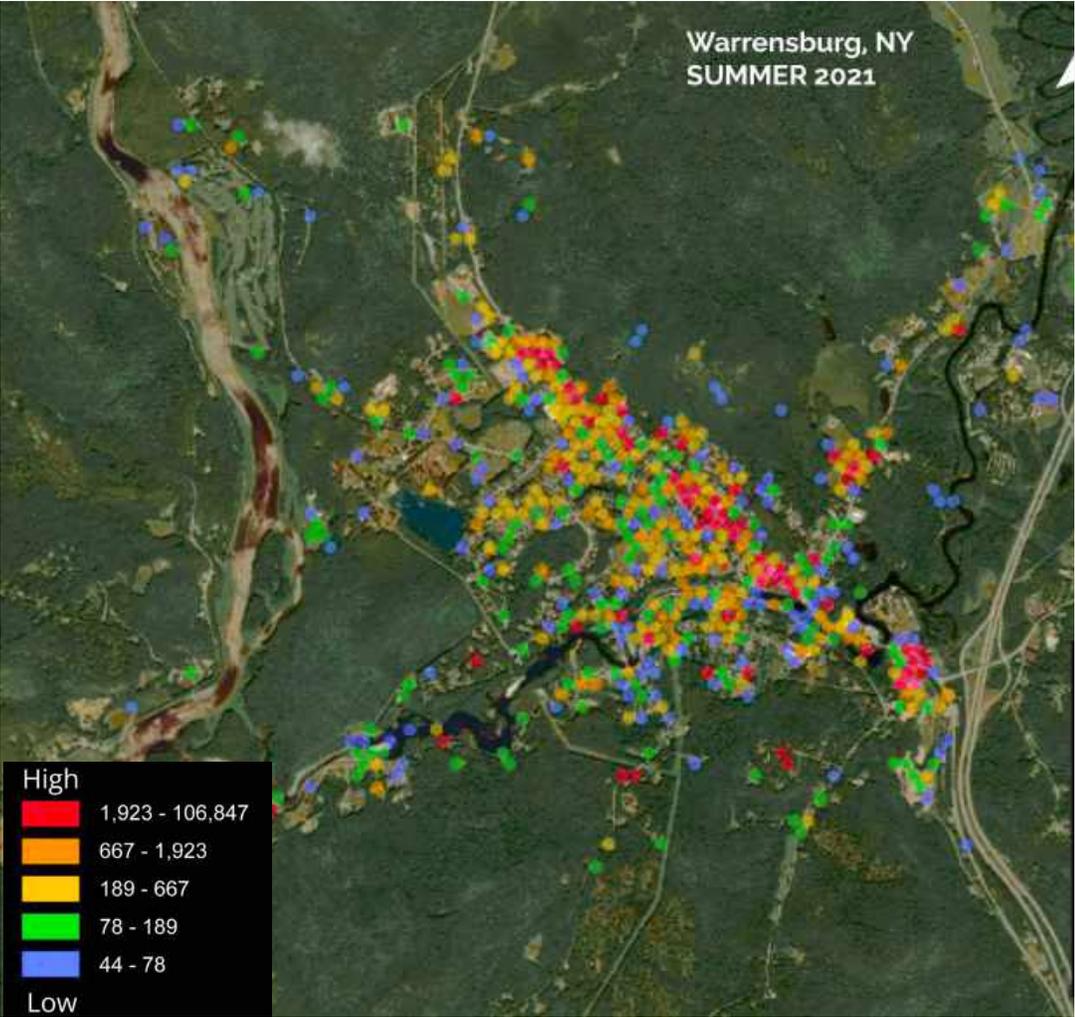


Glens Falls Foot Traffic Heat Map



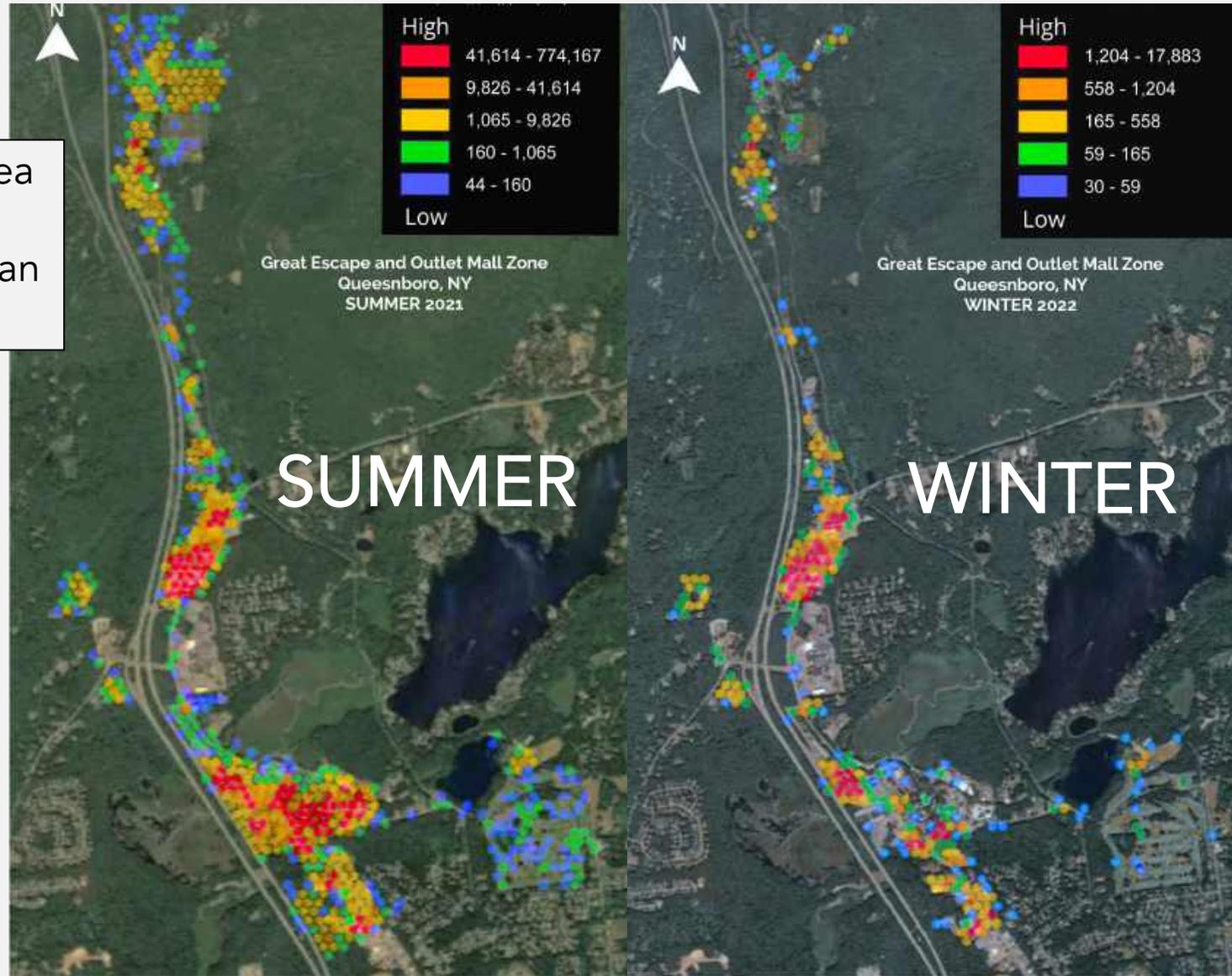
These heat maps show the areas of Glens Falls that experience foot traffic during winter and summer.

Warrensburg Foot Traffic Heat Map



Great Escape & Outlet Foot Traffic Heat Map

The Great Escape area has much stronger summer activation than winter activity.



Major Activity Nodes SWOT

	STRENGTHS	OPPORTUNITIES
POSITIVE	<ul style="list-style-type: none">▪ Activity in the summer months is very strong around Lake George, which attracts visitation from all over the Northeast.▪ Diverse mix of assets and events throughout Warren County.	<ul style="list-style-type: none">▪ Additional events may be able to drive event driven tourism. The events in the market thus far have been rather successful.▪ Development of less popular areas of Warren County.▪ Affordable housing for seasonal workers
NEGATIVE	WEAKNESSES	THREATS
	<ul style="list-style-type: none">▪ Businesses and hotels close during the wintertime.▪ The area is spread out, thus transportation between economic cores is often difficult.▪ Poor cellular connection in many areas	<ul style="list-style-type: none">▪ Seasonality▪ Failure to keep younger generations interested in Warren County caused by a lack of continued innovation▪ Lack of airport connectivity, other areas may begin to attract talent/businesses as a result

Sports Tourism



Adirondack Sports Park ("The Dome") – Queensbury, NY

Notes: The Dome is a 108,000-square foot indoor turf field. The facility can host multiple games concurrently, allowing the Dome to host tournaments and leagues. In addition to the indoor facility, there are three baseball fields and a multi-use field on the same property.



Cool Insuring Arena – Glens Falls, NY – Capacity 4,806

Notes: The Cool Insuring Arena is home to the Adirondack Thunder, an ECHL affiliate of the New Jersey Devils. The arena is more than a hockey arena in that it also hosts smaller concerts, the Puppy Bowl (2021 and 2022) and high school basketball sectional tournaments. It can have one court/ice sheet at a time which limits its ability to host multi-team tournaments.



Glens Falls Recreation Center – Glens Falls, NY

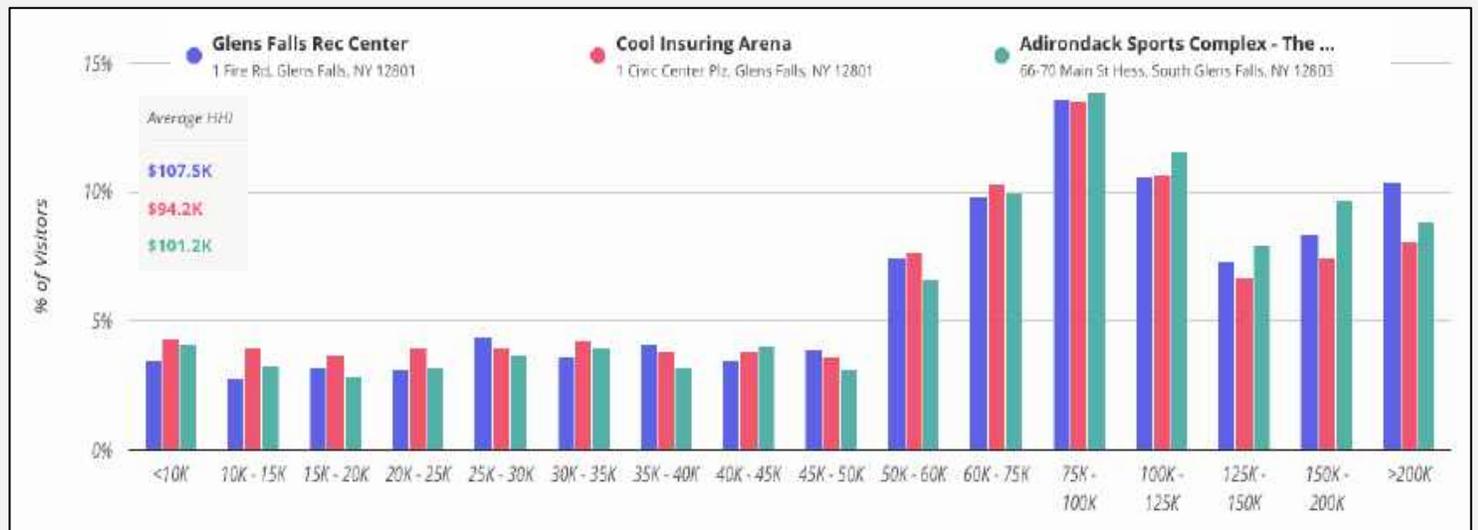
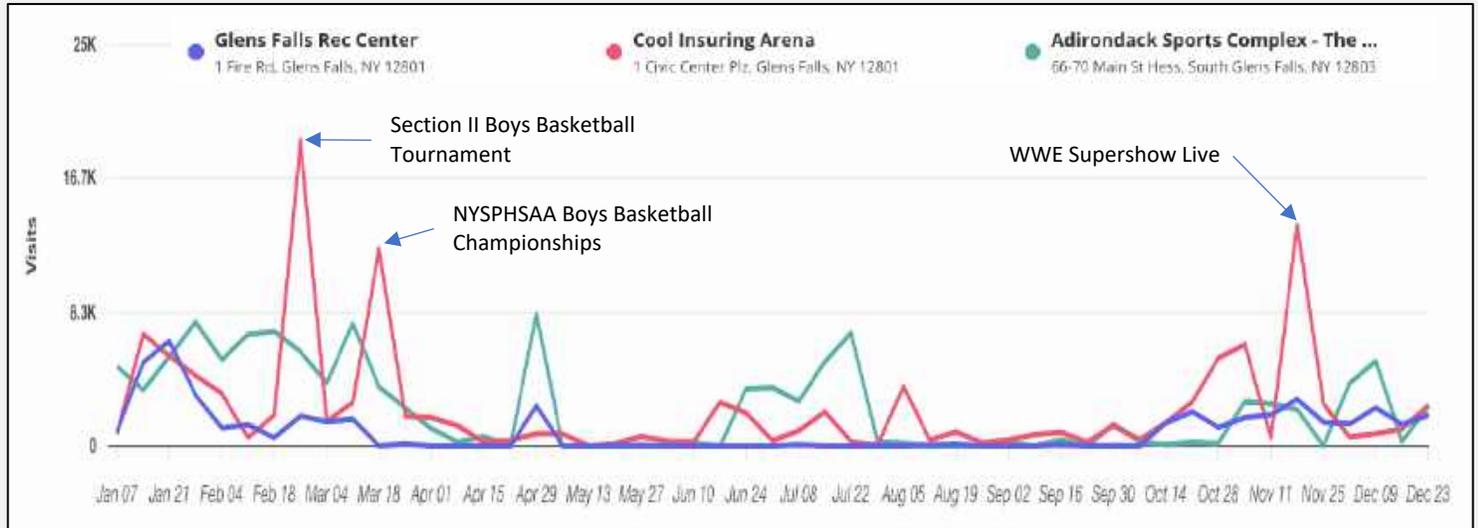
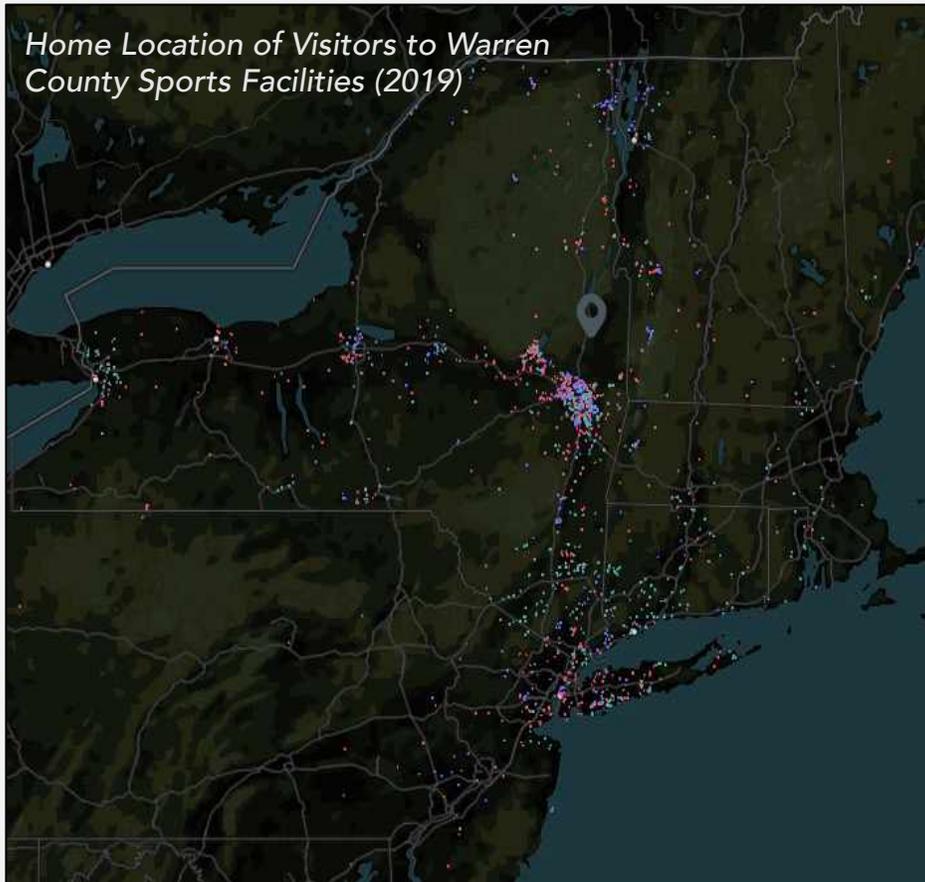
Notes: The Glens Falls Rec Center is an ice facility located next door to the Glens Falls YMCA. The facility hosts youth hockey organizations, figure skating events and public skates for the community.

Warren County Sports Facilities Visitation

2021 Combined Visitation Characteristics beyond 30 miles to Warren County Sports Facilities:

- 300,100 visits
- 134,900 unique visitors

Home Location of Visitors to Warren County Sports Facilities (2019)



Factors Driving Tournament Demand & Activity

There are several factors that impact a city's ability to capture large tournaments. These factors include the following:

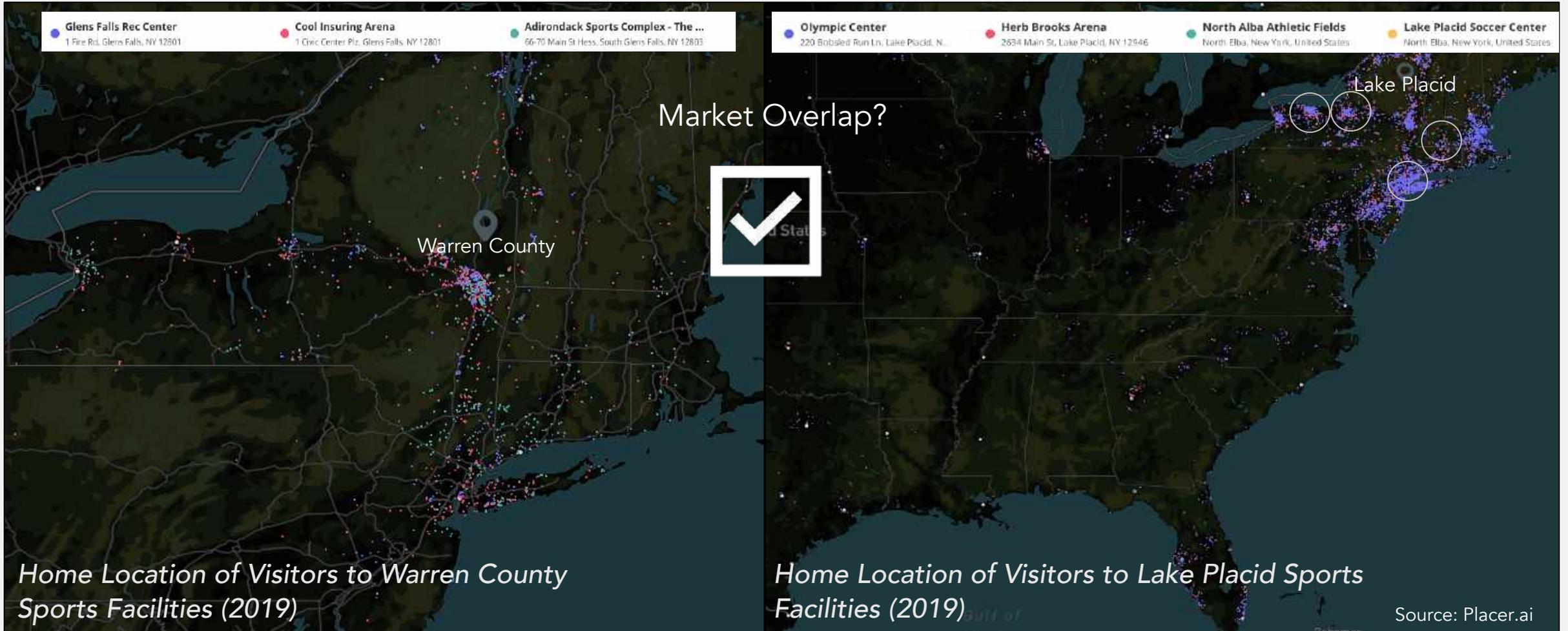
- Number and quality of fields and playing surfaces
- Strong on/off-site amenities and attractions
 - Food & Beverage
 - Retail
 - Hotels
 - Entertainment
- Accessibility, by Air and by Car

Counties, cities and destinations with stronger packages of the above listed items will be more successful in attracting major tournament groups. These major tournament groups garner a nationwide pull for tournaments, which brings in teams from surrounding states and across the country.

Opportunity in Warren Co.

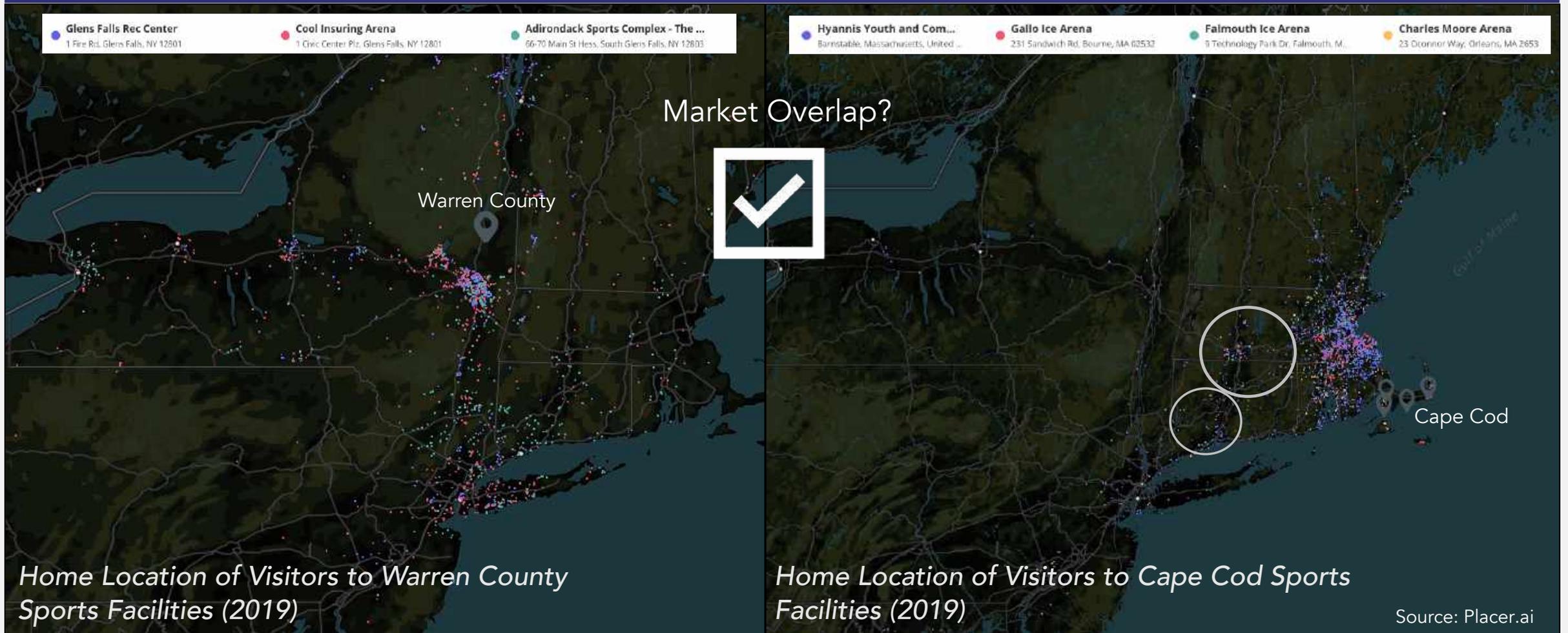
- There is a gap in indoor facilities for court sports and hockey
- The area has seen success in outdoor tournaments, leading to 43 percent of the area group business, but has room for growth during winter/mud months
- Sectional basketball and minor league hockey already use the Cool Insuring Arena. This facility could be leveraged as a championship sheet/court for basketball and hockey tournaments.

Warren County vs Lake Placid Sports Visitation



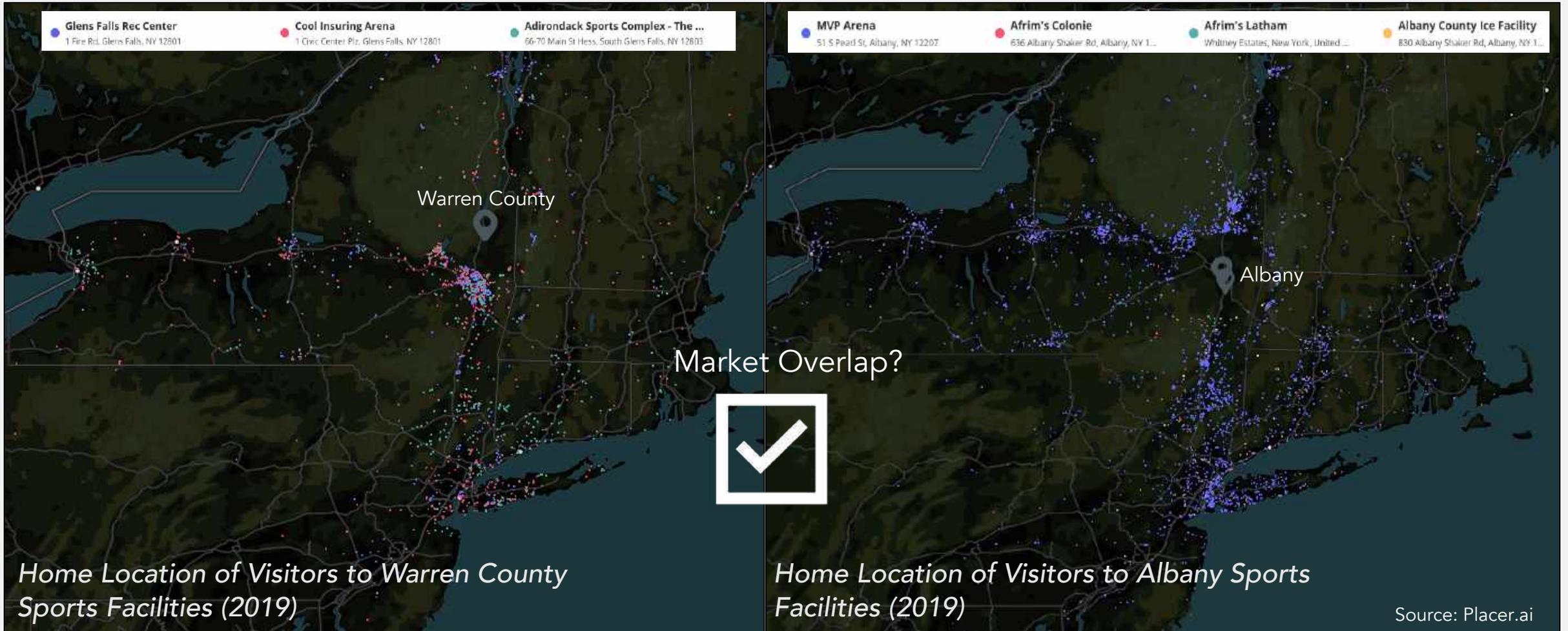
Currently, Warren County and Lake Placid attract visitors from many of the same locations for youth sports competitions. Lake Placid's historical relevance in hockey as well as their quality of facilities, such as the Herb Brooks Arena, allow them to host large regional tournaments. Warren County does not currently have a quality facility that would allow them to compete in attracting tournaments.

Warren County vs Cape Cod Sports Visitation



In 2019, Warren County attracted more visitors from Connecticut and Massachusetts to their sports facilities than Cape Cod attracted from Warren County. Visitors to Warren County from Connecticut and Massachusetts went to the Cool Insuring Arena and Adirondack Sports Complex which are two destinations for hockey, basketball and volleyball. With a more competitive youth sports facility Warren County has the potential to attract more visitors from Central Connecticut and Massachusetts that currently visit Cape Cod for tournaments.

Warren County vs Albany Sports Visitation



When comparing sports visitation to Albany and Warren County, Albany has an advantage due to MVP Arena. However, when comparing the smaller youth sports facilities, (Glens Falls Rec Center and Adirondack Sports Complex in Warren County compared to Afrim's Colonie & Latham and Albany County Ice Facility) Warren County's sports facilities attract a larger visitation base. Warren County has an opportunity to develop a multi-sport facility that could enhance this advantage and capture tournament traffic in Albany and other parts of Upstate New York.

HSP interviewed the staff of the Lake George CVB to better understand Warren County's Sports Tourism market. The following points list the key takeaways:

- The CVB has recently looked into expanding the supply of sports facilities in Warren County including the acquisition of the Lake George Forum. The forum was of interest to the CVB because of its location to Cool Insuring Arena, which hosts regional tournaments. The forum would have allowed for the ability to expand the size of tournaments held in the area, but it was purchased to be utilized as a boat showroom.
- The Dome is a busy facility that is typically fully booked in the winter months and the CVB has had to turn away business because there is no availability at the facility for additional tournaments or events. The CVB uses the Dome and SUNY Adirondack for basketball and volleyball tournaments, but they need additional sport courts to help support larger tournaments that are interested in hosting events in the market. Basketball Tournaments have been difficult to pursue because of limited courts in the county.
- There is a shortage of ice facilities in the market and the Cool Insuring Arena is not always available because of their contract with the Adirondack Thunder ECHL team. Recently, Albany has lost some of their ice sheet supply. There is a big opportunity for Warren County to fill the gap in the regional market.

Interview Adirondack Youth Hockey Assoc.



Royce Lawrence, President of AYHA

Hockey in Warren County:

There are currently 525 children participating in AYHA, with over 100 coaches and hundreds of other family volunteers.

AYHA is one of the five largest youth hockey programs in New York state, and the largest to the east of Rochester.

Hockey families have to travel to Buffalo, Rochester, NY; Marlboro, MA; Philadelphia, PA for tournaments.

The hockey season lasts from October to April. During the spring, these hockey players often shift to lacrosse.

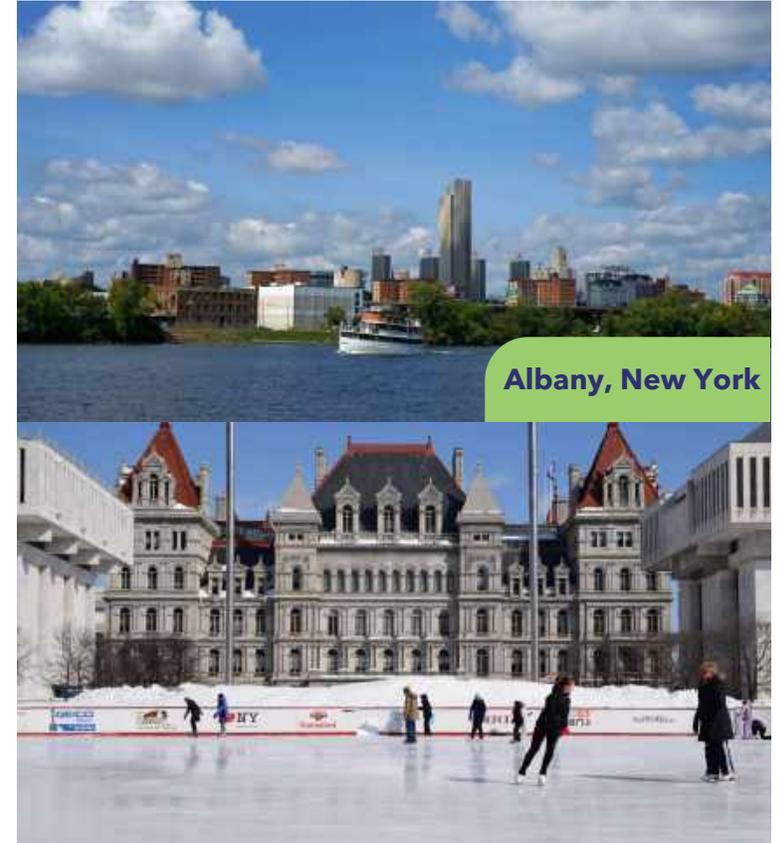
Warren County sees strong competition with Essex County over youth hockey programs.

	STRENGTHS	OPPORTUNITIES
POSITIVE	<ul style="list-style-type: none"> ▪ Strong summer visitation from assets and events ▪ Mid-scale arena: facility to host concerts and host sporting events ▪ Data tracking of tourism assets ▪ Strong regional visitation 	<ul style="list-style-type: none"> ▪ Indoor youth sports & event facility ▪ Hotel at Gore Mountain ▪ Expansion of special events calendar ▪ Utilization of expanded mobile tracking data to further compare to competitors
NEGATIVE	WEAKNESSES	THREATS
	<ul style="list-style-type: none"> ▪ Strength of winter assets compared to many regional competitors ▪ Lack of hotel availability near largest ski mountain ▪ Closing of shops during winter season ▪ Distance from airport 	<ul style="list-style-type: none"> ▪ Climate change affecting seasonality of events and winter assets ▪ Competition for regional visitors amongst nearby destinations

Chapter 3: Competitive Destination Overview

Competitive Vacation Destinations

Year-Round



Year-Round Destination Overview

Destination	Competitor?	Key Takeaways
Essex County (Lake Placid), New York		Strong identity with strong year-round assets. <i>Best Practices: Sports Tourism, Meetings and Events</i>
Saratoga Springs, New York		Strong horse racing identity and town history. <i>Best Practices: Meetings and Events, Special Events</i>
Albany, New York		State Capital allowing for meetings and high school sporting events. <i>Best Practices: Meetings and Events</i>

Destinations with Relevant Arenas



Warren County
Cool Insuring Arena
4,807 capacity



Atlantic City
Jim Whelan Boardwalk
10,500 capacity



Hershey
Giant Center
10,500 capacity



Albany
MVP Arena
15,357 capacity



Lake Placid
Herb Brooks Arena
7,700 capacity



Daytona Beach
Ocean Center (Arena)
9,312 capacity

Music Venue Comparison

Large arenas give destinations a venue to host large scale concerts and sporting events year-round. HSP identified larger scale music venues and arenas in each of the competitive markets and used geofencing data to determine how the use of these assets compare with Warren County.

Warren County’s assets have relatively low visitation compared to the competitive destination arenas. This shows a potential area of opportunity and current weakness of Warren County as an entertainment destination.

**Competitive Destination Music Venue Visitation Over 30 Miles
(January 1, 2019 - December 31, 2019)**

Venue	Location	2019 Visits	2019 Visitors	Visits/Customer
Jim Whelan Boardwalk	Atlantic City, NJ	870,600	574,200	1.52
Giant Center	Hershey, PA	688,400	471,800	1.46
MVP Arena	Albany, NY	379,800	257,800	1.47
CMAC	Canandaigua, NY	331,500	214,000	1.55
Ocean Center (Arena)	Daytona Beach, FL	329,300	150,300	2.19
Hershey Stadium	Hershey, PA	291,700	259,800	1.12
Saratoga Performing Arts Center	Saratoga Springs, NY	264,600	157,800	1.68
Daytona Beach Bandshell	Daytona Beach, FL	258,600	214,700	1.20
Herb Brooks Arena	Lake Placid, NY	224,700	122,400	1.84
Shepard Park	Lake George, NY	203,600	172,300	1.18
Cool Insuring Arena	Glens Falls, NY	125,800	67,900	1.85
Casino Ballroom	Hampton Beach, NH	94,200	78,700	1.20
Seashell Stage	Hampton Beach, NH	49,200	44,100	1.12
Spruce Peak Arts	Stowe, VT	24,000	14,600	1.64
del Lago Casino - The Vine	Waterloo, NY	15,800	11,400	1.39

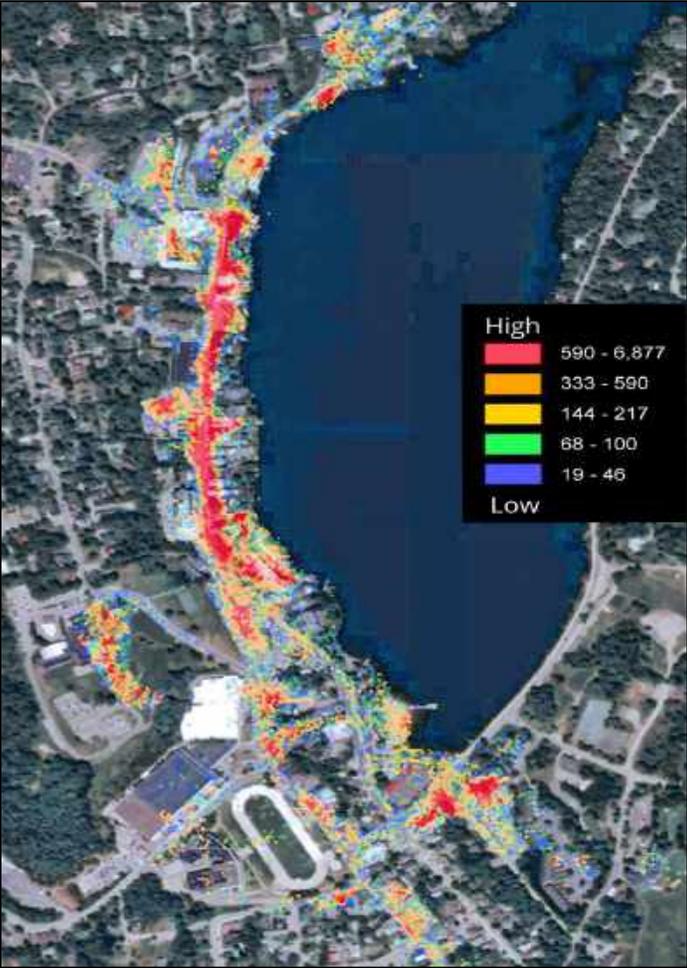
Grey highlighted cells represent indoor venues, blue highlight represents Warren County venues
Source: Placer.ai

Adirondack Region Summer Foot Traffic Heat Map

Lake George

Lake Placid

Saratoga Springs

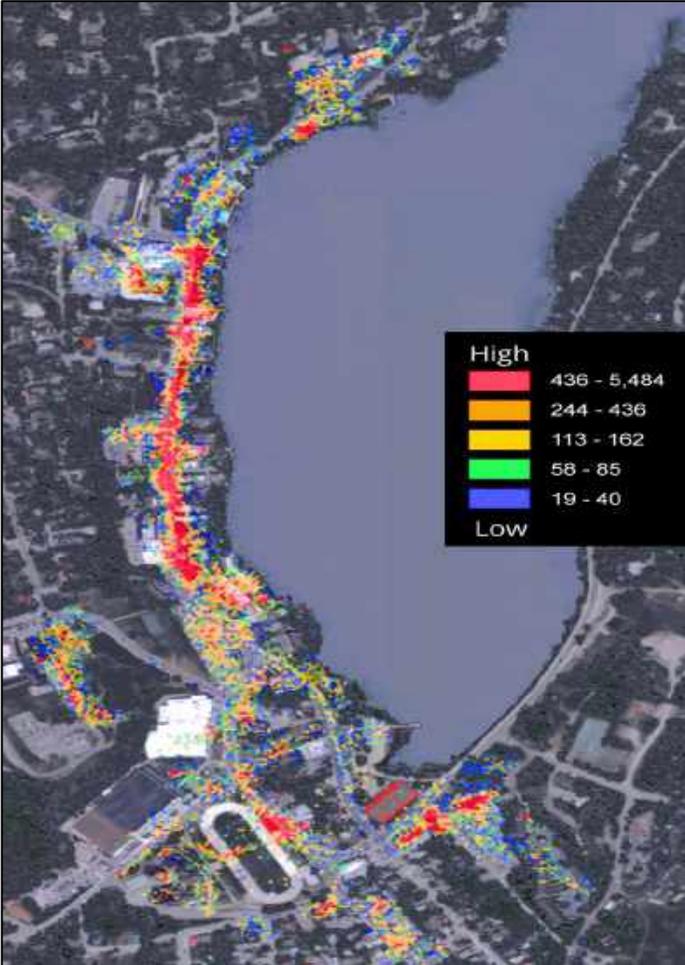


Adirondack Region Winter Foot Traffic Heat Map

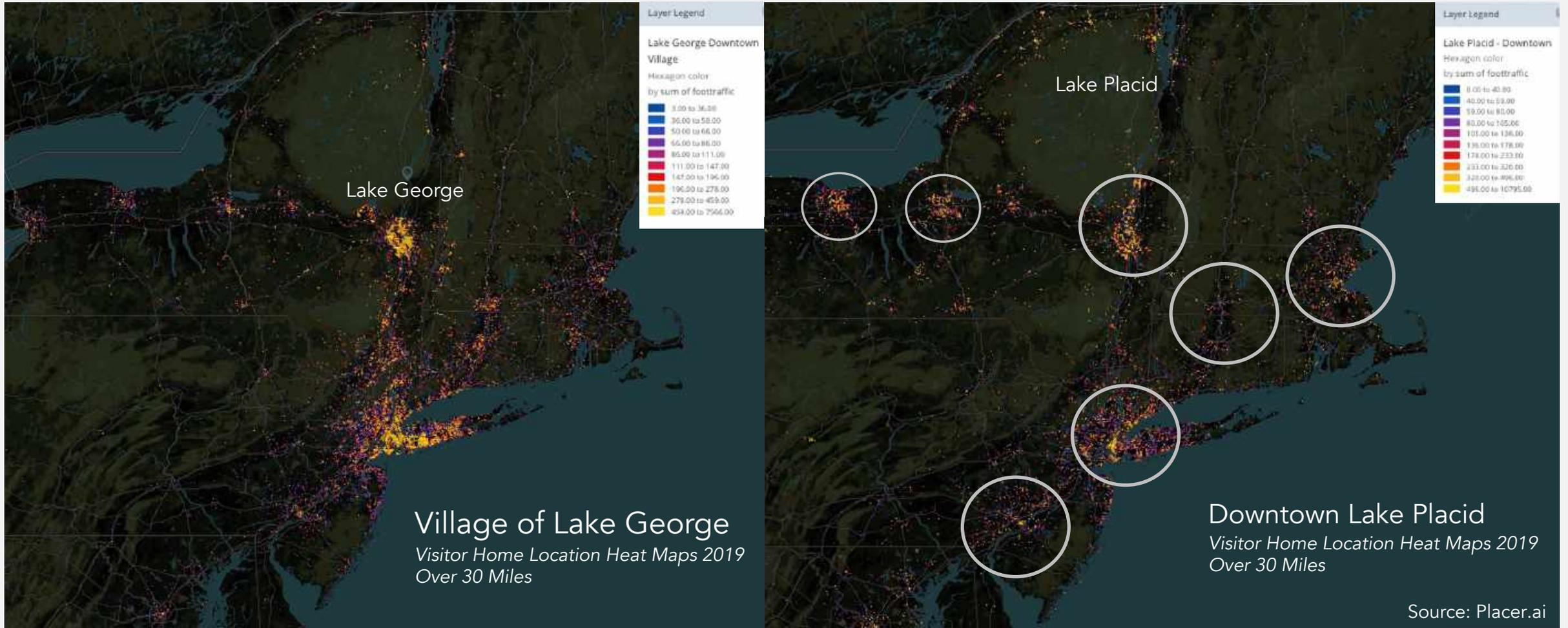
Lake George

Lake Placid

Saratoga Springs



Warren County vs Essex County Visitation



In 2019, Lake George attracted a larger visitation base from Saratoga Springs, Albany, the New York-Newark-Jersey City MSA (New York City MSA), central Massachusetts and Connecticut than Lake Placid. Lake Placid attracted a larger visitation base from Western New York, the Boston-Cambridge-Newton MSA (Boston MSA), the Philadelphia-Camden-Wilmington MSA (Philadelphia MSA) and the Northern Adirondack region.

Lake Placid Summer v Winter Visitation

For summer and winter seasons, the largest market for Lake Placid tourism is the New York City market followed by the nearby area of Albany-Schenectady-Troy, New York. Lake Placid pulls from the Rochester market to a greater degree than Warren County.

Lake Placid experiences more weekend trips during the summer compared to the winter months.

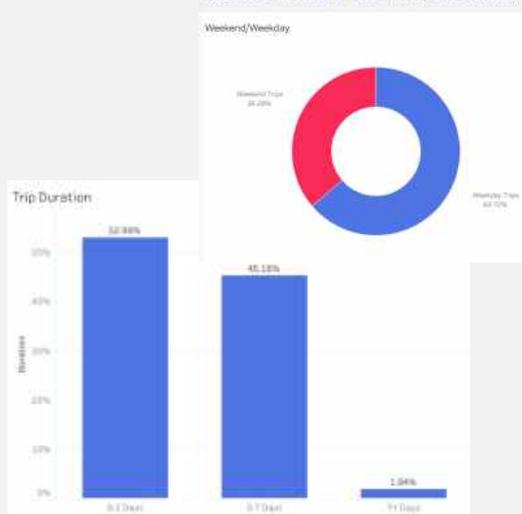
Number of Trips From Each MSA to Lake Placid - Core Tourist Area Between Jun 2021 - Sep 2021



Summer 2021

Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	85,301
Albany-Schenectady-Troy, NY	41,174
Rochester, NY	28,566
Syracuse, NY	24,209
Philadelphia-Camden-Wilmington, PA-NJ-DC-MD	16,753
Buffalo-Cheektowaga, NY	15,680
Boston-Cambridge-Newton, MA-NH	14,610
Plattsburgh, NY	9,114
Washington-Arlington-Alexandria, DC-VA-MD-WV	7,568
Baltimore-Columbia-Towson, MD	6,443
Utica-Rome, NY	6,132
Chicago-Naperville-Elgin, IL-IN-WI	5,983
Bridgeport-Stamford-Norwalk, CT	4,891
Poughkeepsie-Newburgh-Middletown, NY	4,628
Ogdenburg-Massena, NY	2,562
Springfield, MA	2,369

Trip Statistics for Lake Placid - Core Tourist Area (Jun 2021 - Sep 2021)



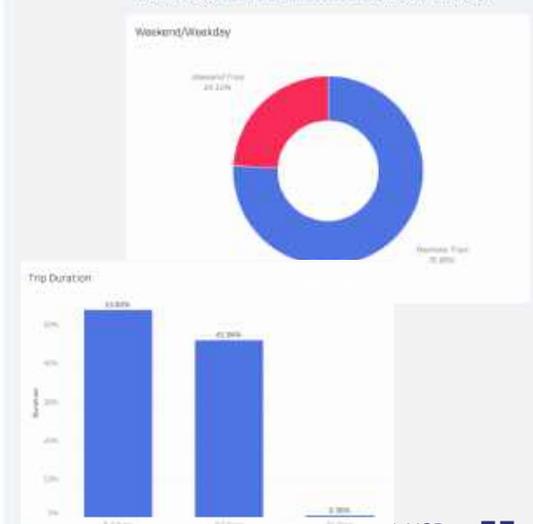
Number of Trips From Each MSA to Lake Placid - Core Tourist Area Between Jan 2022 - Mar 2022



Winter 2022

Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	69,179
Albany-Schenectady-Troy, NY	24,980
Rochester, NY	9,670
Boston-Cambridge-Newton, MA-NH	9,226
Syracuse, NY	8,577
Philadelphia-Camden-Wilmington, PA-NJ-DC-MD	8,394
Buffalo-Cheektowaga, NY	6,127
Ogdenburg-Massena, NY	4,957
Poughkeepsie-Newburgh-Middletown, NY	4,776
Plattsburgh, NY	4,574
Glens Falls, NY	4,533
Bridgeport-Stamford-Norwalk, CT	3,953
Utica-Rome, NY	3,339
Malone, NY	3,122
Providence-Warwick, RI-MA	2,644
Watertown-Fort Drum, NY	1,085

Trip Statistics for Lake Placid - Core Tourist Area (Jan 2022 - Mar 2022)



Interview: Lake Placid CVB – Roost ADK

HSP interviewed representatives from ROOST ADK. Key takeaways from the interview are summarized below.

Visitation

Lake Placid's remote location pushes most travelers to stay overnight.

The name recognition from the Olympics allows them to continually benefit from large numbers of international travelers.

ROOST believes Lake Placid is truly unique, but its biggest competitors are Stowe and Vail for winter activities.

Events

The majority of large groups that visit the area are sports oriented. Some of these events are the Ironman, Empire State Winter Games and Winter Carnival at Saranac Lake.

Data

ROOST tracks occupancy tax collections and uses customer intercept surveys to gather data on tourism. These reports are made available on their website.

These data points help make ROI decisions on marketing and event initiatives.

Lake Placid occupancy tax collections have grown as a result of both higher rates and increased demand.

Thoughts on Warren Co.

Lake Placid faces less seasonality compared to Warren County because they have achieved a year-round identity, highlighted by their winter tourism strength. Another advantage of Lake Placid is ease of access to both summer and winter activities from the main village.

HSP analyzed Essex and Hamilton County as competitive destinations, the following implications were drawn.

What They Do Best:

While Lake Placid is commonly known for the winter Olympics, it has developed itself into a 365-day destination that generates more visitation during the summer months. Because it hosted the winter Olympics, the area has the infrastructure to host any winter sport tournament. A best practice of Lake Placid is their use of sports tourism, during the summer and winter months.

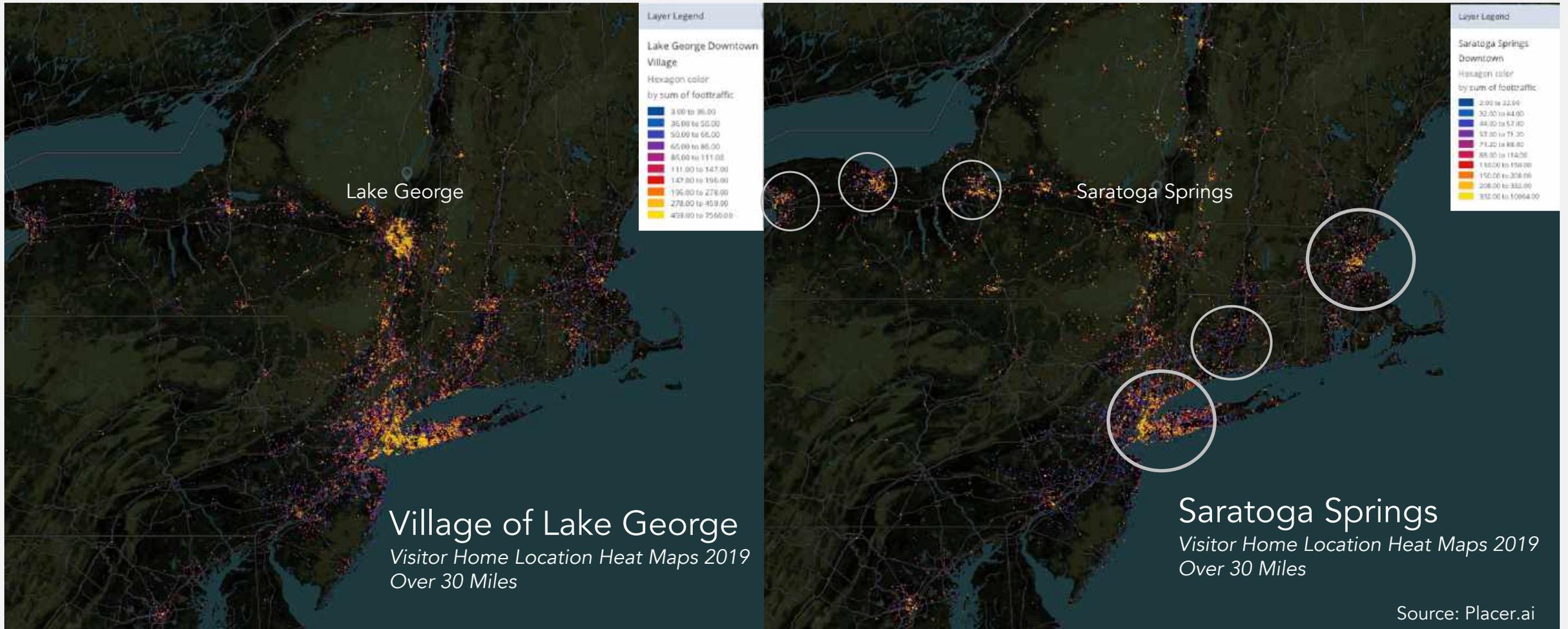
Hamilton County is a more remote, less known area, with visitation from visitors for hiking and other outdoor activities.

Why They Are a Good Competitor:

Warren County truly competes with other Northeast destinations with similar assets. When people who live in the Northeast decided to go on a lake or mountain vacation, they choose between areas in the Adirondacks. Similar to Warren County, Lake Placid has built an identity of hiking, lake days and skiing. When looking at Warren County, Lake Placid is likely one of its top alternative vacation destinations in the eyes of visitors.

Hamilton County is not a competitive destination as it does not attract high levels of tourism or position itself as a destination with its marketing efforts.

Warren County vs Saratoga Springs Visitation



In 2019, Lake George attracted a larger visitation base from the New York City MSA, central Massachusetts and Connecticut than Saratoga Springs. Saratoga Springs attracted a larger visitation base from Western New York and the Boston MSA. Due to the 30-mile filter, Albany and Adirondack region visitation is not applicable for comparison. The most market overlap occurs in Boston, Connecticut, New York City and Western New York.

Saratoga Springs Summer v Winter Visitation

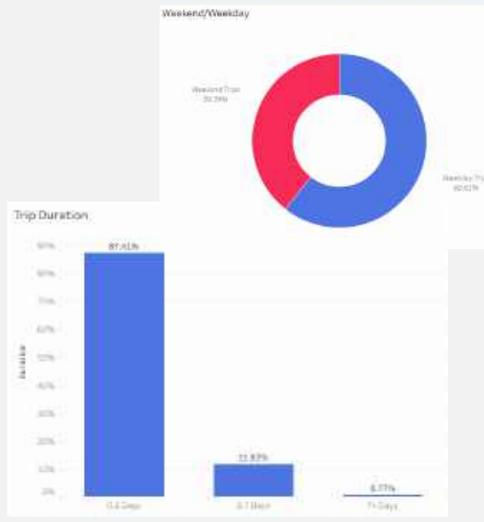
For summer and winter seasons, the largest market for Saratoga tourism is the New York City. During the summer the Saratoga market has a much wider and greater pull for tourism. During the winter months it becomes more localized.

Number of Trips From Each MSA to Saratoga Springs - City, State Park, Racetracks and Retail Between Jun 2021 - Sep 2021



Summer 2021

Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	163,181
Boston-Cambridge-Newton, MA-NH	37,549
Albany-Schenectady-Troy, NY	24,282
Syracuse, NY	23,190
Poughkeepsie-Newburgh-Middletown, NY	22,618
Rochester, NY	20,352
Utica-Rome, NY	17,961
Hartford-East Hartford-Middletown, CT	17,550
Philadelphia-Camden-Wilmington, PA-NJ-D.	16,981
Springfield, MA	13,267
Bridgeport-Stamford-Norwalk, CT	12,764
Kingston, NY	9,635
New Haven-Milford, CT	9,250
Providence-Warwick, RI-MA	8,748
Pittsfield, MA	8,415
Buffalo-Cheektowaga, NY	8,045

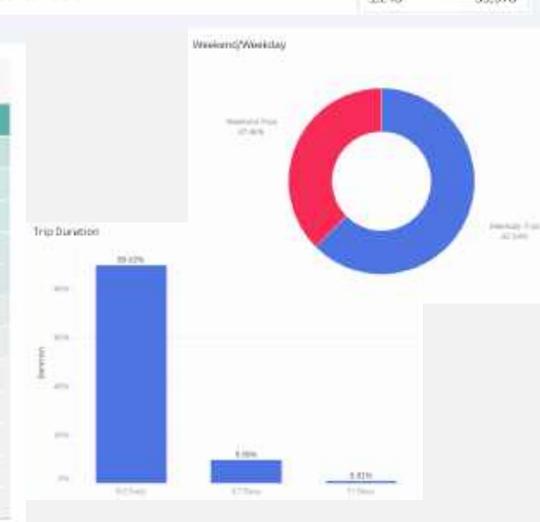


Number of Trips From Each MSA to Saratoga Springs - City, State Park, Racetracks and Retail Between Jan 2022 - Mar 2022



Winter 2022

Origin Name	Trips
New York-Newark-Jersey City, NY-NJ-PA	33,578
Albany-Schenectady-Troy, NY	8,767
Utica-Rome, NY	6,485
Syracuse, NY	6,415
Boston-Cambridge-Newton, MA-NH	6,092
Poughkeepsie-Newburgh-Middletown, NY	5,980
Rochester, NY	4,000
Kingston, NY	3,221
Hudson, NY	1,795
Plattsburgh, NY	1,406
Providence-Warwick, RI-MA	1,317
Philadelphia-Camden-Wilmington, PA-NJ-D.	1,287
Buffalo-Cheektowaga, NY	1,248



Discover Saratoga Interview Feedback

HSP interviewed the staff of Discover Saratoga to better understand the organization and Saratoga Springs. The following points list the key takeaways:

- Saratoga Springs is a four-season destination with a strong mix of leisure travel in the warmer months and primarily business and group travel in the colder months. Racing season brings strong visitation on weekends, but Discover Saratoga puts more effort into targeting conventions during this time to fill the weekdays and meet goals for RevPAR.
- Due to their location relative to Warren County, Saratoga Springs naturally experiences similar declines in leisure travel in the shoulder and winter months, but the Saratoga City Center helps alleviate these declines by attracting regional and state associations, as well as corporate travel. The Saratoga City Center was expanded in 2011 and is attached to The Saratoga Hilton. The hotel has 242 rooms, 10 meeting rooms and 20,546 square feet of total event space.
- Business travel is drawn to Saratoga Springs because of their eclectic downtown core. Saratoga's main street, or "Broadway," is a walkable downtown core with boutique shops, restaurants, breweries, museums and entertainment for visitors to experience while in the area. There are six hotels on Broadway that allow visitors the freedom to walk around the downtown core.

Discover Saratoga Interview Feedback

HSP interviewed the staff of Discover Saratoga to better understand the organization and Saratoga Springs and the following points list the key takeaways:

- Similar to Warren County, many residents in the area leave in the winter months and activity slows down. To combat this, Saratoga has developed a strong event and festival scene in their winter months. The main events include Chowder Fest, the Victorian Street Walk, Restaurant Week and Beer Week.
- Saratoga Racecourse's racing season falls between mid July and Labor Day. During racing season, there is an influx of tourism activity. Hotels are typically near full occupancy and charge high rates.
- Discover Saratoga has developed incentive programs for new groups that give between \$500 and \$1000 to put towards transportation, food and entertainment expenses.

HSP analyzed Saratoga Springs as a competitive destination, the following implications were drawn.

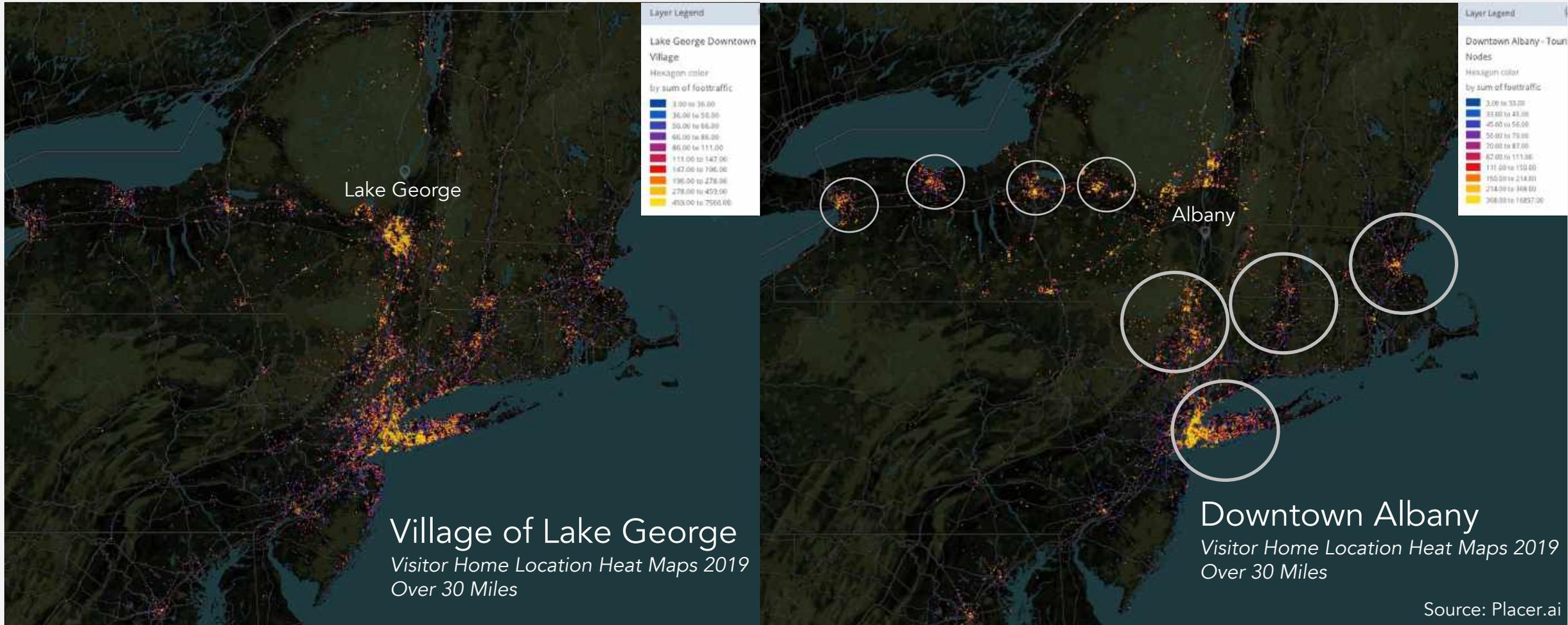
What They Do Best:

Saratoga Springs has maintained a strong identity led by history and culture. In the summer months, Saratoga Springs draws visitors to its world-renowned racecourse and casino, as well as its activated downtown core. This walkable downtown core helps Saratoga Springs stay relevant as a year-round destination by supporting its convention center and local festivals and events. Saratoga focuses on conventions and meetings in the colder, winter months to keep consistent visitation to the area.

Why They Are a Good Competitor:

Saratoga Springs is the closest notable city outside of Warren County. Warren County and Saratoga Springs compete for many of the same visitors in the Adirondack area, but each destination has a unique set of tourism assets.

Warren County vs Albany Visitation



In 2019, Lake George attracted a larger visitation base from the the Philadelphia MSA, Long Island, Connecticut and Massachusetts and New Jersey. Due to Albany being the capital of New York State and its meetings and convention assets, Albany attracted a larger visitation base from major cities within New York such as Buffalo, Rochester, Syracuse and Manhattan. These assets will be covered in section three of this report. The main visitation overlap occurred in Western New York, the New York City MSA, Massachusetts, Connecticut, and Boston.

Discover Albany Interview Feedback

HSP interviewed staff of Discover Albany to better understand the organization and Albany County and the following points list the key takeaways:

- Discover Albany is “very reliant” on meetings and convention business to generate occupancy tax needed to fund the organization. The majority of this business is related to the state’s government meetings and events. The business segment allows them to combat seasonality and generate visitation throughout the year.
- The meetings and conventions market is established and stable in the Albany market. The Albany Capital Center, Empire State Plaza Convention Center, Egg Performing Arts Center and MVP Arena (referred to collectively as the ‘Capital Complex’) combine to more than 159,000 square feet of event space, the largest convention and meeting market in Upstate New York.
- The staff is not pressured to generate leads, but rather assist and manage leads that come to them.
- Albany has a strong youth sports market and recently hired two new sales managers to manage the sports market separately from Discover Albany’s traditional concentrations. Lacrosse, soccer and hockey are the most popular sports within the market.

Discover Albany Interview Feedback

HSP interviewed staff of Discover Albany to better understand the organization and Albany County. The following points list the key takeaways:

- COVID-19 had an extreme negative effect on Albany's tourism with the halt of business travel. The organization was forced to evaluate what tourism assets the county would have if it was not the state capital. As the pandemic continued, they realized they had little to no understanding of their tourism market because of their historical dependence on meetings and conventions.
- Discover Albany mainly promotes heritage and culture through the area's museums, parks and hiking trails. The parks and hiking trails do not significantly contribute to the organization and are not strong tourism drivers.
- Discover Albany does not have a strong system for developing new events and spends more effort on existing events and festivals.

HSP analyzed Albany as a competitive destination, the following implications were drawn.

What They Do Best:

Albany is the capital of New York and the largest market for conventions and meetings in the state. Albany is able to attract large events without expending marketing efforts because of its role in state government. These facilities also allow Albany to attract events such as concerts, NCAA tournament games and other New York State high school championships.

Why They Are a Good Competitor:

Albany is not a relevant competitor to Warren County, other than for sports, because of the different forms of tourism they target. Albany does not place an importance on leisure travel, which is the main market for Warren County.

Competitive Vacation Destinations

Spring, Summer and Fall



Hershey,
Pennsylvania



Finger Lakes,
New York



Cape Cod,
Massachusetts



Hampton Beach,
New Hampshire



Atlantic City,
New Jersey

Spring, Summer, Fall Destination Overview

Destination	Competitor?	Key Takeaways
Hershey, Pennsylvania	<input checked="" type="checkbox"/>	Hersheypark is the main attraction. State capital drives conventions. <i>Best Practices: Amusement Entertainment, Meetings and Events</i>
Finger Lakes, New York	<input checked="" type="checkbox"/>	Multiple lake towns like Village of Lake George and Bolton. Minimal Hotel visitation. Exploding winery visitation.
Cape Cod, Massachusetts	<input checked="" type="checkbox"/>	Beach destination. Baseball tourism. <i>Best Practices: Sports Tourism, Data Collection</i>
Atlantic City, New Jersey	<input checked="" type="checkbox"/>	Strong culture of gambling. Mostly an adult destination. <i>Best Practices: Gaming, Meetings and Events</i>
Hampton Beach, New Hampshire	<input type="checkbox"/>	Strong summer visitation, minimal winter visitation. Beach town. <i>Best Practices: Special Events</i>

Destinations with Premier Amusement Parks



Competitive Amusement Attraction Performance

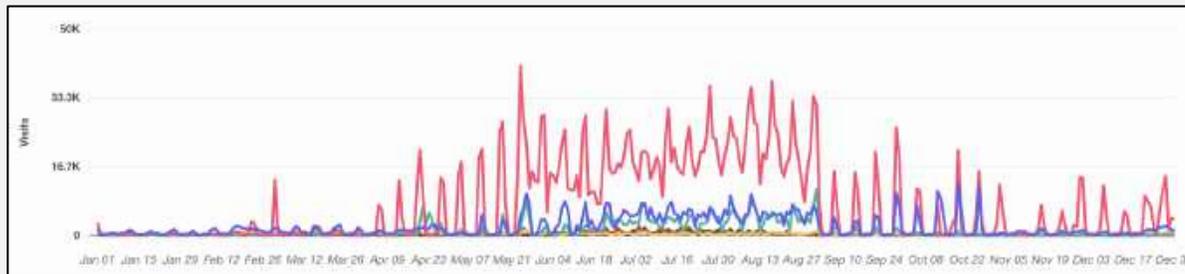
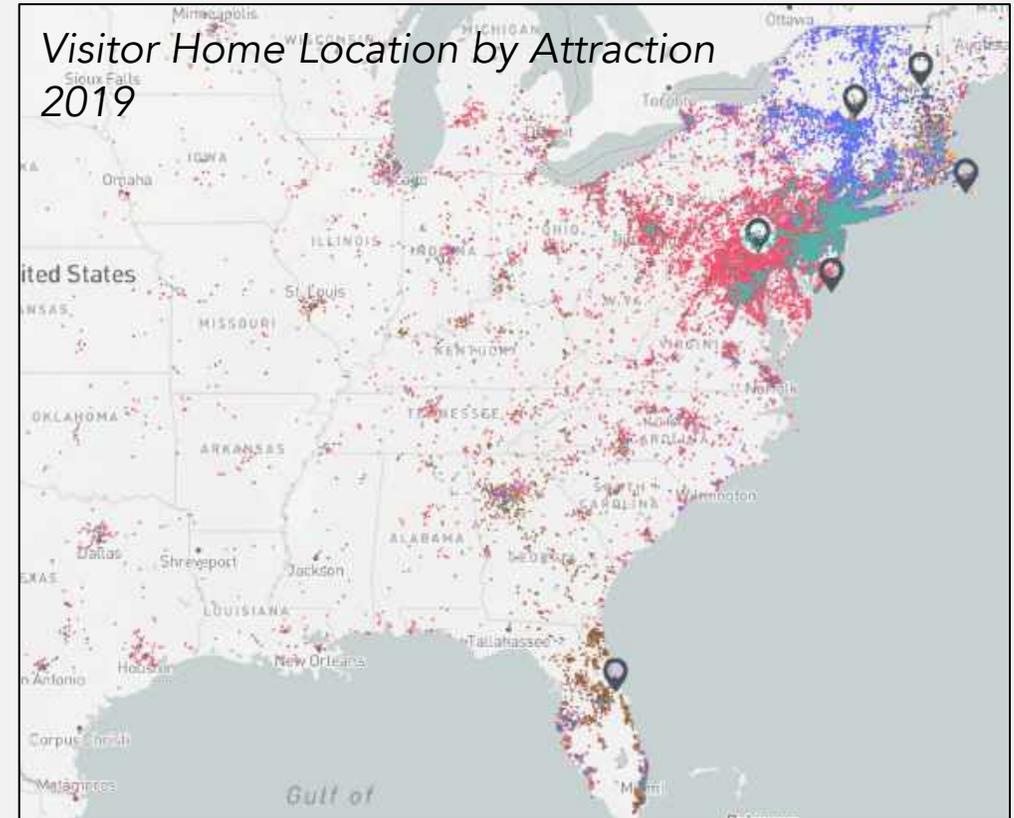
One of Warren County's greatest tourism attractions is the Great Escape amusement park. HSP compared amusement visitation in competitive destinations to provide benchmarks for Warren County to compare against.

**Competitive Destination Amusement Attraction Visitation from Over 30 Miles
(January 1, 2019 - December 31, 2019)**

Attraction	Location	2019 Visits	2019 Visitors	Visits Per Customer
Hersheypark	Hershey, PA	2,700,000	1,900,000	1.42
Great Escape/Splashwater Kingdom	Warren County, NY	757,900	356,900	2.12
Atlantic City Steel Pier	Atlantic City, NJ	392,600	345,400	1.14
Daytona Lagoon	Daytona Beach, FL	118,000	99,500	1.19
Cape Codder Waterpark	Bamstable, MA	96,400	48,700	1.98
Whales Tales Waterpark	Lincoln, NH	45,300	37,500	1.21

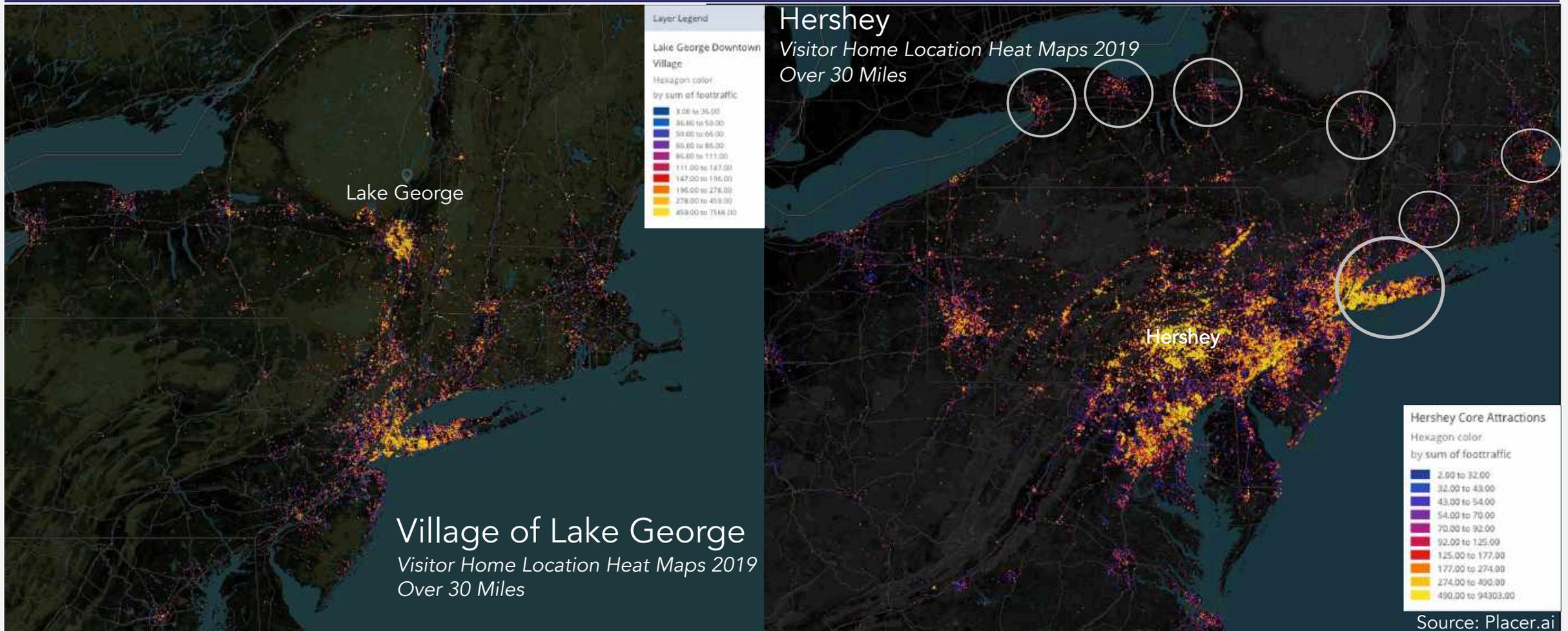
Source: Placer.ai

*Visitor Home Location by Attraction
2019*



Hersheypark attracts the most visitors each year by a wide margin. Hersheypark attracts visitors from all over the country while The Great Escape in Warren County mainly attracts visitors from New York, Vermont, New Hampshire, Connecticut and Massachusetts.

Warren County vs Hershey Visitation



Hershey, Pennsylvania was among the top destinations covered in this report in terms of total visitation numbers in 2019. Hershey's location allows it to attract visitors from the New York City MSA, (Warren County's largest visitation base) the Philadelphia MSA, the Washington-Baltimore MSA (Washington D.C. MSA) and other major cities along the eastern seaboard. Hershey also generated visitation from Western New York, Connecticut and Massachusetts that are located closer to Warren County. The main visitation overlap occurred in New York City, Connecticut, Boston, Albany and Western New York.

HSP analyzed Hershey as a competitive destination, the following implications were drawn.

What They Do Best:

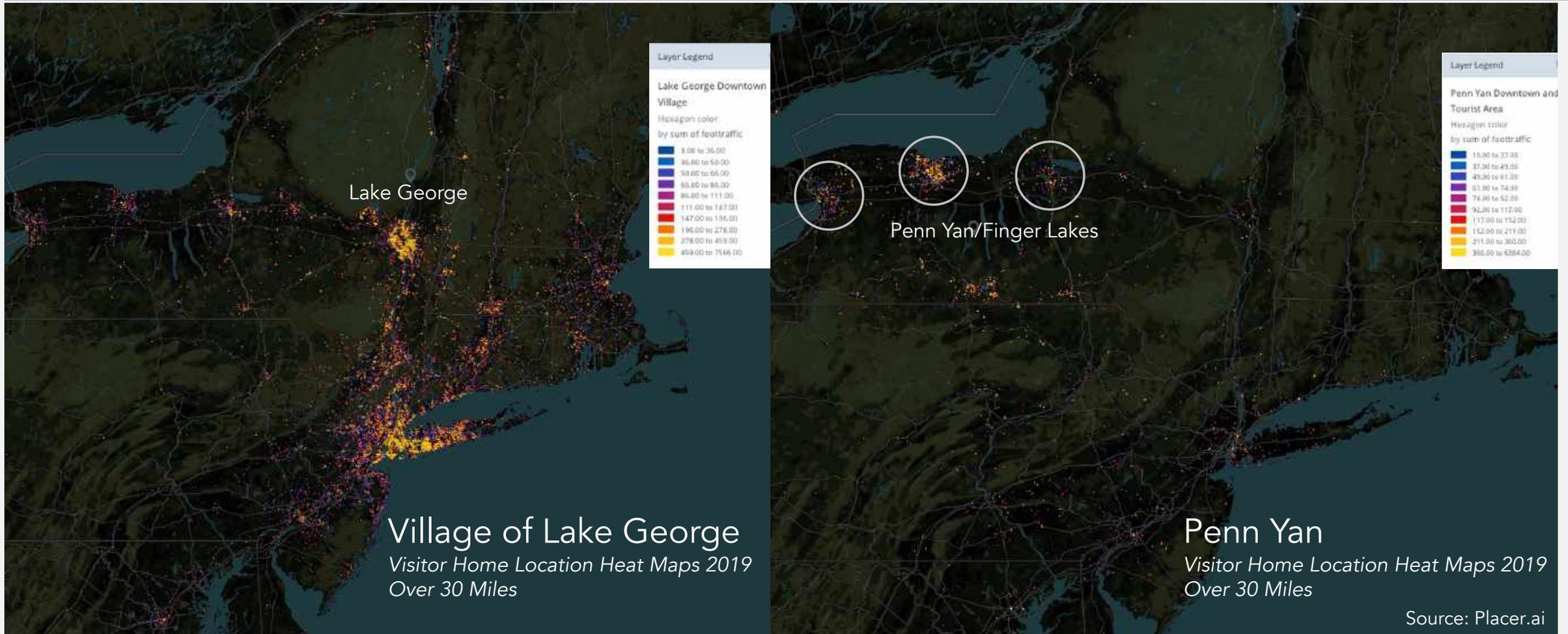
Hershey effectively leverages their strongest asset to generate tourism, Hersheypark. The amusement park brings in the majority of visitation to the area during summer months, but closes during the winter. Hershey's other attractions are located in close proximity to the park, effectively creating connectivity and critical mass between tourism assets.

The visitor's bureau for Hershey also covers the state capital, Harrisburg. Like many state capitals, Harrisburg is a strong market for meetings and events especially those relating to state government. These meetings and conventions happen year-round, but account for the majority of out-of-town visitors during the winter months.

Why They Are a Good Competitor:

Hersheypark is a similar asset to The Great Escape amusement park in Warren County. The amusement parks in both areas make them successful in being a family destination. Both destinations rely on drive-in visitation and compete in the same major markets, such as New York City, Upstate New York and Boston.

Warren County vs Finger Lake Visitation



Penn Yan is smaller competitive destination among many in the Finger Lakes region. In 2019, Penn Yan primarily attracted visitors from Southwestern New York, Buffalo, Rochester and Syracuse. Warren County attracted visitors from many of these same markets but attracted more visitors from nearly every part of the Northeast.

The Finger Lakes Tourism body declined HSP's request for an interview. HSP analyzed the Finger Lakes Region as a competitive destination, the following implications were drawn.

What They Do Best:

The Finger Lakes Region is primarily an outdoor destination with popular lakes, wineries, hiking trails and craft beverage trails.

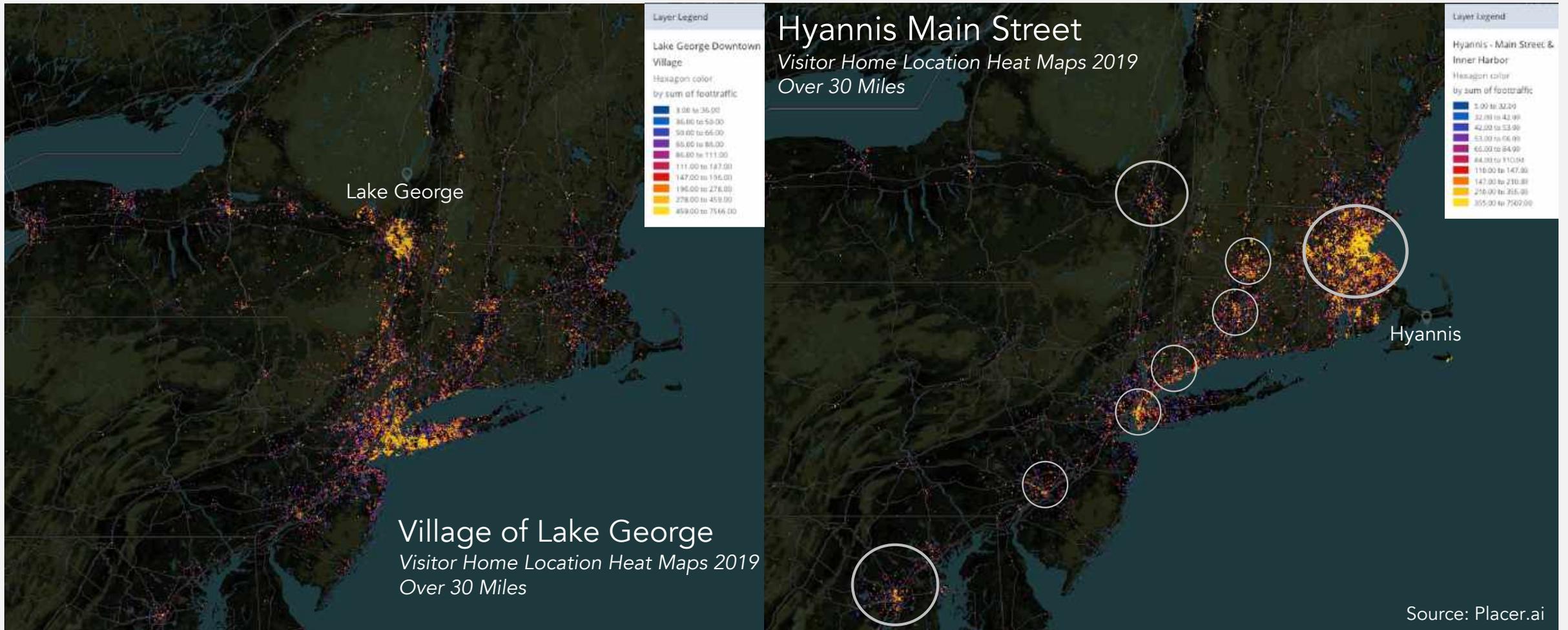
The Finger Lakes Region has built an identity as a wedding and winery tour destination, taking advantage of the eleven scenic lakes.

There are many towns and cities located within the region that all offer different festivals and events throughout the year, drawing visitors to different places for unique experiences.

Why They Are a Good Competitor:

The Finger Lakes Region spans 14 counties in western New York, attracting visitors from Upstate New York, New York City, Pennsylvania and New Jersey. Warren County competes for these visitors with many of the same outdoor recreational offerings. The region's location to Rochester and Syracuse allow people from both markets to access the Finger Lake with more ease than making the longer trip to Warren County.

Warren County vs Cape Cod Visitation



Cape Cod is another strong competitor in terms of total visitation numbers. Cape Cod's main visitor base in 2019 came from the Boston MSA but also attracted visitors from other parts of Massachusetts, Rhode Island, Connecticut, New Hampshire, the New York City MSA, Albany, Philadelphia MSA and Western New York. The main visitation overlap occurred in the Boston MSA, Massachusetts, Connecticut, the New York City MSA, Albany, the Philadelphia MSA and The Washington D.C. MSA.

HSP interviewed the staff of Cape Cod's Chamber of Commerce to better understand the organization and Cape Cod. The following points list the key takeaways:

- Cape Cod is primarily a spring, summer and fall family destination spread out across 15 different towns. Each town has their own tourism efforts, but Cape Cod's overall tourism is overseen by the Cape Cod Chamber of Commerce. The chamber publishes the Cape Cod Travel Guide which is a large source of revenue each year.
- Cape Cod is known as an outdoor recreation hub for water activities, whale watching, beaches and golf. Popular beaches and golf courses are spread out throughout the cape which forces people to explore different towns. The most popular parts of Cape Cod include Hyannis, Falmouth, Provincetown, Yarmouth, Chatham and Mashpee Commons.
- The Chamber has begun to run campaigns to advertise Cape Cod as a year-round destination with events, festivals and youth sports. Cape Cod targets youth sports events because it results in family travel and more "heads and beds" during the winter. Cape Cod has multiple youth sports facilities for hockey, figure skating, basketball and volleyball tournaments over the winter months which helps in their slower seasons. Cape Cod attracts youth sports and SMERF group business from Boston, Rhode Island and Connecticut.
- Cape Cod tracks their tourism through STR data, airport traffic data and social media reach.
- Cape Cod has created StatsCapeCod.org and DataCapeCod.com to track information such as tourism traffic, population growth, room tax generation and performance of the economy on a yearly basis.

HSP analyzed Cape Cod as a competitive destination, the following implications were drawn.

What They Do Best:

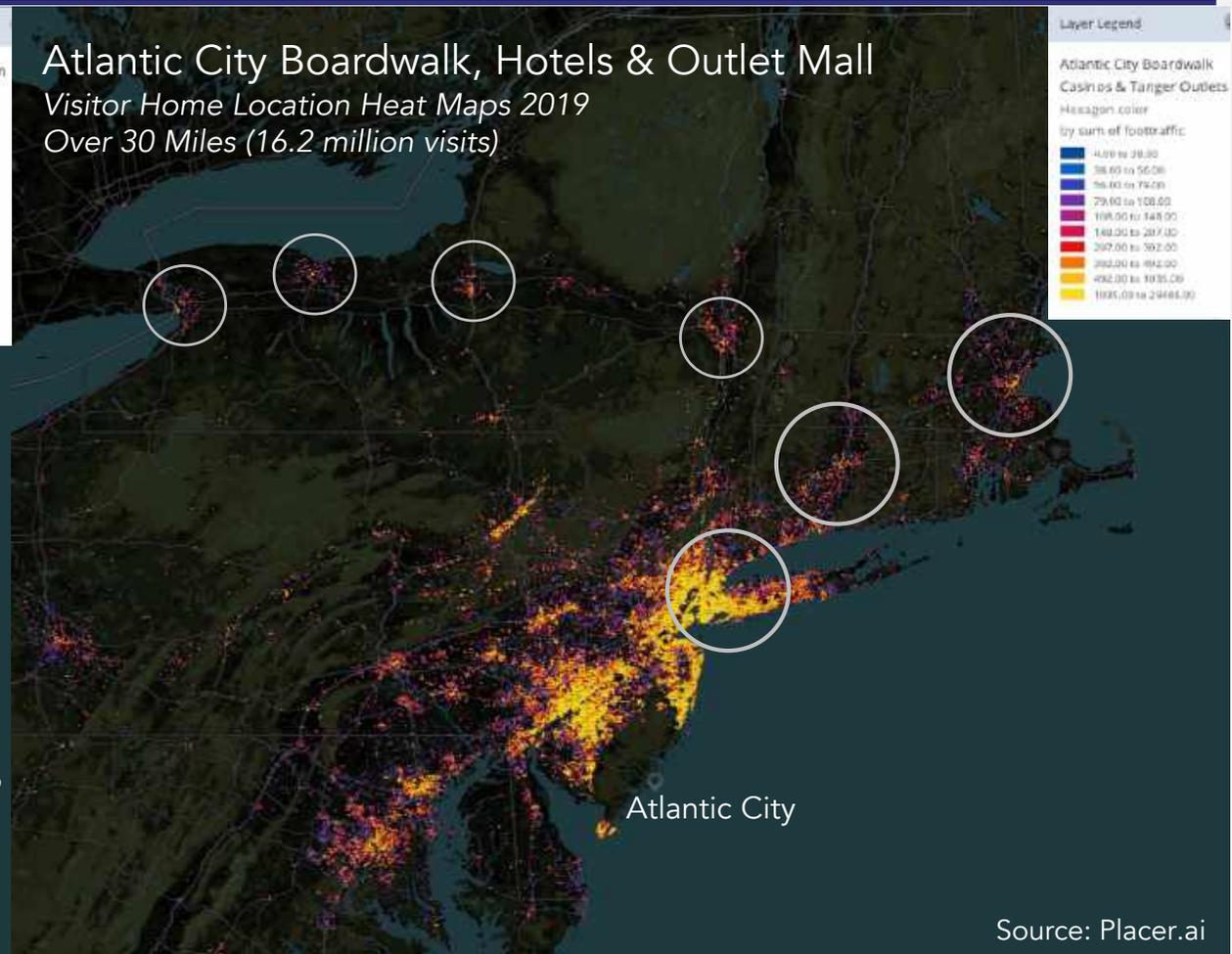
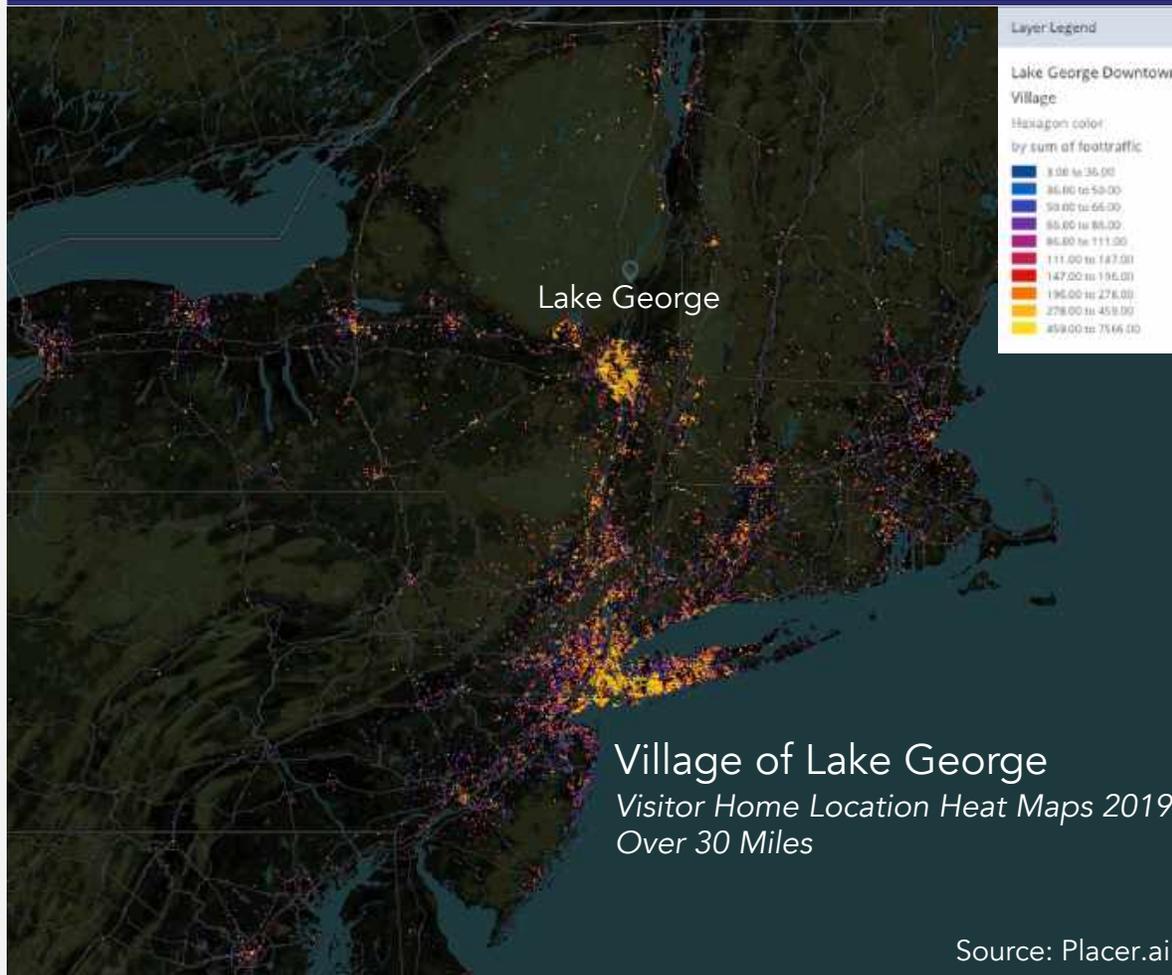
Cape Cod has many outdoor tourism drivers in the spring, summer and fall. Cape Cod is known for its beaches, variety of water recreation options, whale watching and golf courses. Cape Cod also has a robust festival and events schedule that attracts people in the spring, fall and winter which are slower for tourism compared to the summer.

Although Cape Cod does not have a convention center like many of the competitors, they have a strong year-round sports presence. In the winter months, Cape Cod attracts visitors from Boston, Worcester, Springfield in Massachusetts as well as people from Rhode Island and Connecticut. In the summer months, Cape Cod hosts the Cape Cod Baseball League, drawing in hundreds of thousands of visitors throughout the season.

Why They Are a Good Competitor:

Cape Cod is a popular summer destination for family vacations with a wide variety of outdoor recreation options. Cape Cod has multiple popular beach towns that offer different attractions, encouraging visitors to experience different parts of the cape year over year. Similar to Warren County, Cape Cod is not in an optimal geographic location for conventions but has developed youth sports assets to attract visitation in the slower months of tourism.

Warren County vs Atlantic City Visitation



Atlantic City was among the top destinations covered in this report in terms of total visitation numbers in 2019. Similar to Hershey, PA, Atlantic City's location allows it to attract visitors from the New York-Newark-Jersey City MSA, (Warren County's largest visitation base) the Philadelphia-Camden-Wilmington MSA, the Washington-Baltimore MSA. In addition to the major MSAs, Atlantic City also attracted visitors from many of the same markets as Warren County including Upstate New York, Connecticut, Massachusetts and Boston. Despite competing in many of the same markets, Atlantic City and Warren County attract different demographics which will be covered in section four of this report.

Atlantic City - Meet AC

In 2014, the Casino Redevelopment Authority (CRDA) took control over the destination marketing roles previously held by the A.C. Convention and Visitors Authority. The CRDA oversees commercial redevelopment, destination marketing and sporting and special events. Meet AC is the non-profit organization under CRDA that books events in the convention center and Boardwalk Hall. As of 2015, Meet AC received \$8.1 million annually for its budget and marketing plan.

The CRDA is funded through the Atlantic City Tourism Promotion Fee which is \$2 per day for occupied room in hotels with gambling and \$1 in all other occupied hotel rooms.

The State charges a 7 percent occupancy fee, while Atlantic City charges an additional 1 percent. These funds go into the general fund and a few other funds.

Due to the lack of available information and denied interview requests, HSP is unable to determine how the CRDA/Atlantic City spend marketing dollars for tourism. In the following analysis, it will be shown gambling is the main tourism attraction and it is reasonable to assume each casino performs its own marketing. As a result, the marketing landscape in Atlantic City is very different than that of Warren County, New York.



Meet AC declined HSP's request for an interview. HSP analyzed Atlantic City as a competitive destination, the following implications were drawn.

What They Do Best:

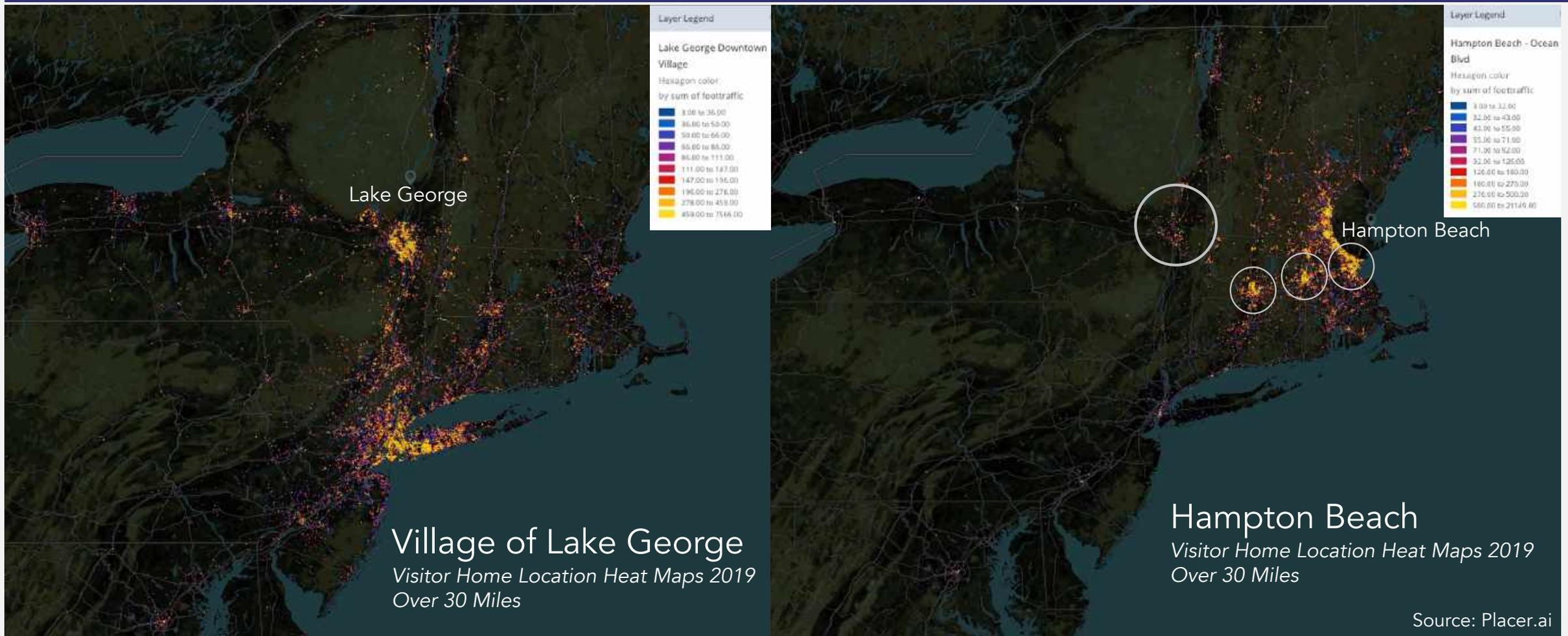
Atlantic City is a strong tourism driver within the northeast. It benefits from having a close proximity to some of the largest, most dense areas of the United States. The majority of visitors from the region travel to Atlantic City to take part in an older, smaller version of Las Vegas.

Why They Are and Are Not a Good Competitor:

Warren County and Atlantic City are both tourism destinations for summer tourism because of their beaches and outdoor recreation options. As a result, during summer months they offer similar watersports and family activities. Warren County and Atlantic City both attract high volumes of tourism from the New York City MSA, but Atlantic City has the geographic advantage to draw visitation from Philadelphia and Washington D.C.

HSP determined Atlantic City is not a true tourism competitor to Warren County. Atlantic City attracts an older, and lower income group of individuals compared to Warren County. While Atlantic City has popular beaches and boardwalks, it is primarily known for its historic gambling environment. Atlantic City's reputation tends to attract older demographics as opposed to the families and younger demographics that Warren County attracts.

Warren County vs Hampton Beach Visitation



In 2019, Hampton Beach mainly attracted visitors from the Boston-Cambridge-Newton MSA and New Hampshire. The main overlap in attraction between Warren County and Hampton Beach occurred in Springfield, Massachusetts, Worcester, Massachusetts, Hartford, Connecticut, the Boston MSA and Rhode Island. Hampton Beach also attracted visitors from Vermont and Albany.

The Hampton Beach Tourism body declined HSP's request for an interview. HSP analyzed Hampton Beach as a competitive destination, the following implications were drawn.

What They Do Best and What They Do Poorly:

Hampton Beach is a good example of a strong events market. During the summer months, the Chamber of Commerce fills the calendar with special events that do a fairly good job of filling the calendar. The Chamber of Commerce in Hampton Beach does not commit marketing resources to filling the winter calendar.

Hampton does not have a large convention center to host meetings and events.

Why They Are a Good Competitor and Why They Are Not:

Similar to Warren County, the Hampton area does not have a large convention center. With the Hampton Salt March, the Hampton area has potential to attract visitors looking for nature similar to Warren County.

Hampton also has outdoor water activities that people may view as alternatives to Warren County during summer months.

Competitive Vacation Destinations

Winter



**Watertown,
New York**



**Woodstock,
New Hampshire**



Stowe, Vermont



Rutland, Vermont



Daytona, Florida

Winter Destination Overview

Destination	Competitor?	Key Takeaways
Woodstock, New Hampshire	<input checked="" type="checkbox"/>	Strong winter assets. Unique summer assets. <i>Best Practices: Meals Tax, Separate Season Marketing Entities</i>
Stowe, Vermont	<input checked="" type="checkbox"/>	Stronger Hiking and skiing options compared to WC. <i>Best Practices: Nature Visitation</i>
Rutland, Vermont	<input checked="" type="checkbox"/>	Similar hiking and skiing options to WC. <i>Best Practices: Special Events</i>
Daytona Beach, Florida	<input checked="" type="checkbox"/>	Strong year-round visitation with lack of seasonality. <i>Best Practices: Special Events Funding, Data Collection</i>
Watertown, New York	<input type="checkbox"/>	Poor occupancy tax collections. Weak winter assets. <i>Best Practices: None.</i>

Destinations with Premier Skiing Assets



Warren County,
New York
Gore Mountain



Essex County,
New York
Whiteface Mountain



Rutland,
Vermont
*Stratton, Okemo, Killington
Mountains*



White Mountains,
New Hampshire
*Attitash, Loon Mountains &
Mount Sunapee*



Stowe,
Vermont
Stowe Mountain

Ski Mountain Comparison

Hunden compared visitation statistics over 30 miles between the competitive set's major ski mountains.

In 2019, Gore was the most visited mountain not affiliated with a major ski pass. The mountain's metrics (acres, drop and number of lifts) are not very different from the more visited mountains.

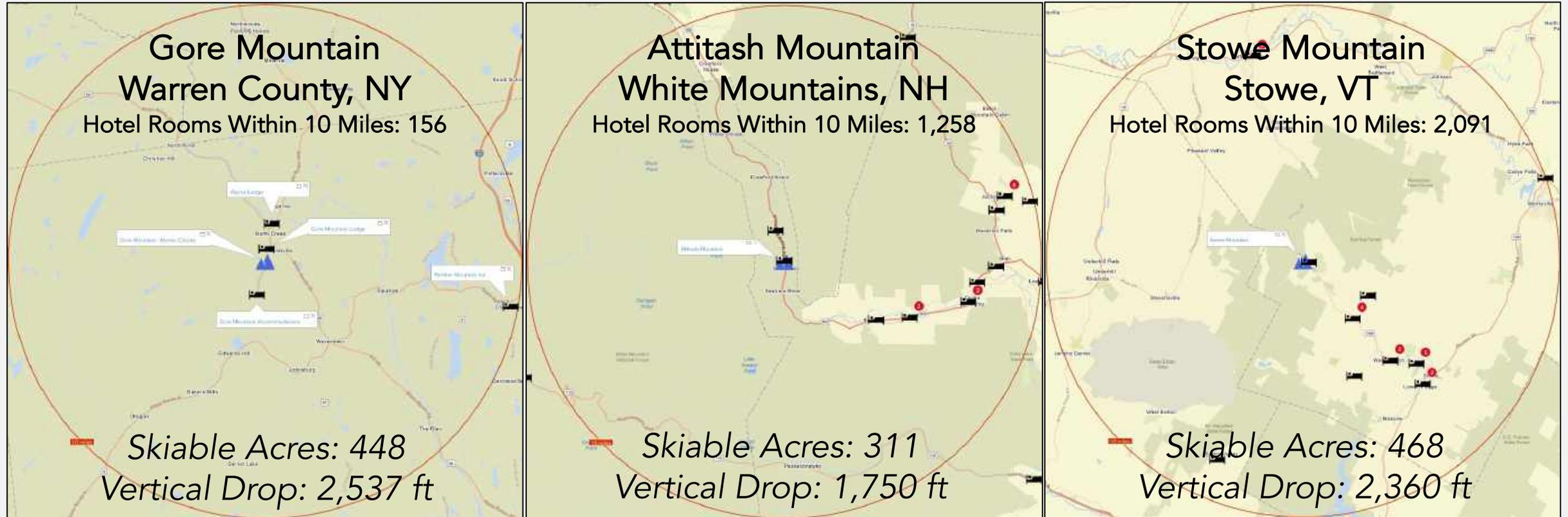
The area where it Gore falls short is the number of nearby hotels. Of the studied mountains, Gore Mountain has the third fewest number of hotel rooms within a five-mile radius. Its relatively strong visitation with minimal hotels suggest it benefits from regional day trippers.

Pass	Mountain	Destination Market	Hotels Rooms Within 10 Miles	Skiable Acres	Vertical Drop	No. of Lifts	2019 Visits	2019 Visitors	Visits Per Customer
●	Stratton Mountain*	Winhall, VT	1,268	670	2,003	11	881,300	240,900	3.66
▲	Attitash Mountain	White Mountains, NH	1,258	311	1,750	9	632,900	255,100	2.48
●	Loon Mountain	White Mountains, NH	1,648	370	2,100	10	631,600	205,800	3.07
▲	Stowe Mountain	Stowe, VT	2,091	468	2,360	13	610,300	218,500	2.79
▲	Okemo Mountain	Rutland, VT	355	667	2,200	20	554,900	183,900	3.02
●	Killington Mountain	Rutland, VT	2,338	1,509	3,050	22	402,000	203,400	1.98
▲	Mount Sunapee	White Mountains, NH	268	233	1,510	8	392,500	137,000	2.86
◆	Gore Mountain	Warren County, NY	156	448	2,537	14	362,700	137,700	2.63
●	Sugarbush Mountain*	Warren, VT	349	581	2,600	16	355,000	96,900	3.66
◆	Whiteface Mountain	Lake Placid, NY	1,867	288	3,430	12	350,400	167,300	2.09
◆	Cannon Mountain	White Mountains, NH	1,812	285	2,180	11	327,000	156,600	2.09
◆	Cranmore Mountain	White Mountains, NH	2,550	200	1,200	9	318,900	171,500	1.86
◆	Bretton Woods	White Mountains, NH	533	467	1,500	10	256,900	107,300	2.39
◆	Waterville Ski Area	White Mountains, NH	1,036	265	2,020	12	208,600	62,100	3.36
◆	Bromley Mountain	Rutland, VT	1,311	178	1,334	9	185,300	88,400	2.10
◆	Smugglers Notch	Stowe, VT	675	310	2,610	8	169,300	63,600	2.66
◆	Greek Peak	Finger Lakes, NY	880	220	952	8	160,800	55,300	2.91
▲	Wildcat Mountain	White Mountains, NH	1,286	225	2,112	5	152,800	57,800	2.64
◆	West Mountain	Warren County, NY	2,539	126	1,010	5	125,000	78,200	1.60
●	Pico Mountain	Rutland, VT	2,274	468	1,967	7	121,700	41,200	2.95
◆	Bristol Mountain	Finger Lakes, NY	0	138	1,200	5	117,300	43,200	2.72
◆	Magic Mountain	Rutland, VT	606	205	1,500	6	63,200	23,100	2.74
◆	Bolton Valley Resort	Stowe, VT	1,825	300	1,704	6	52,600	22,700	2.32
◆	Black Mountain	White Mountains, NH	2,118	140	1,100	4	39,900	17,700	2.25
◆	Song Mountain	Finger Lakes, NY	43	100	700	5	12,700	6,500	1.95
◆	Dry Hill Ski Area	Watertown, NY	1,403	35	300	3	8,800	4,000	2.20

*Mountain is not an identified competitive destination, but included as it is regional competitor
Source: Placer.ai, Various

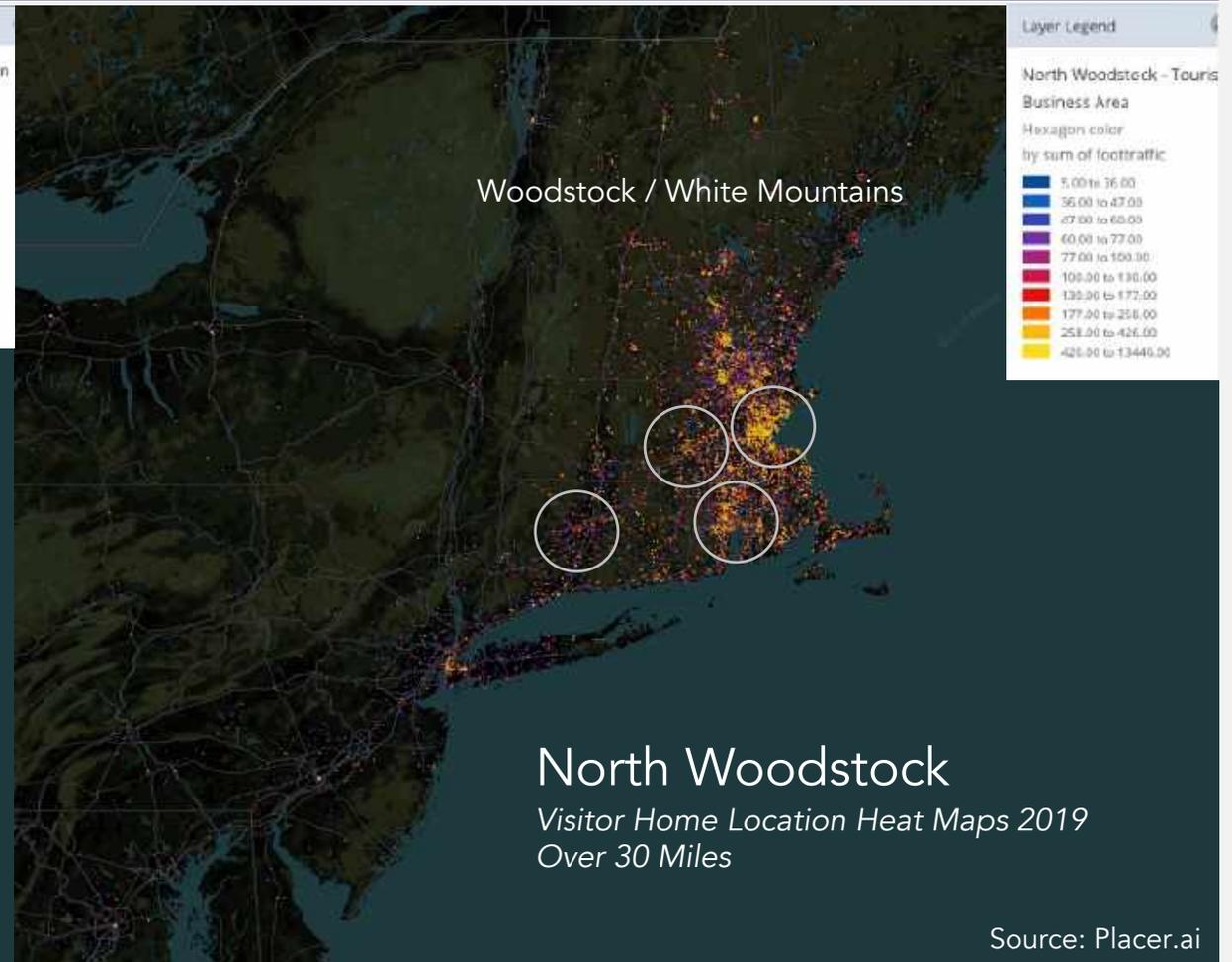
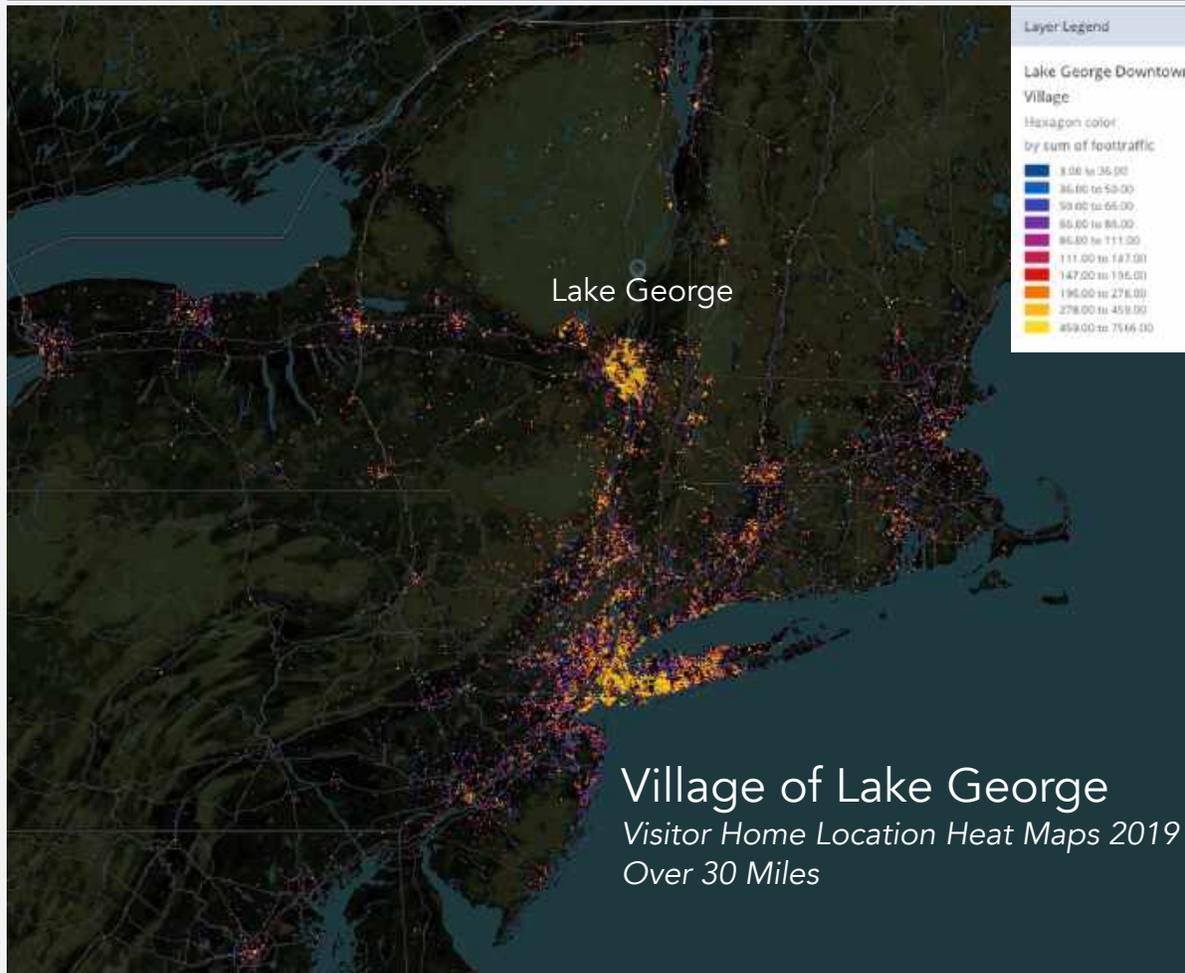
Legend	
●	Ikon Pass Partner
▲	Epic Pass Partner
◆	Non-Epic/Ikon Partner

Ski Mountain Hotel Availability Comparison



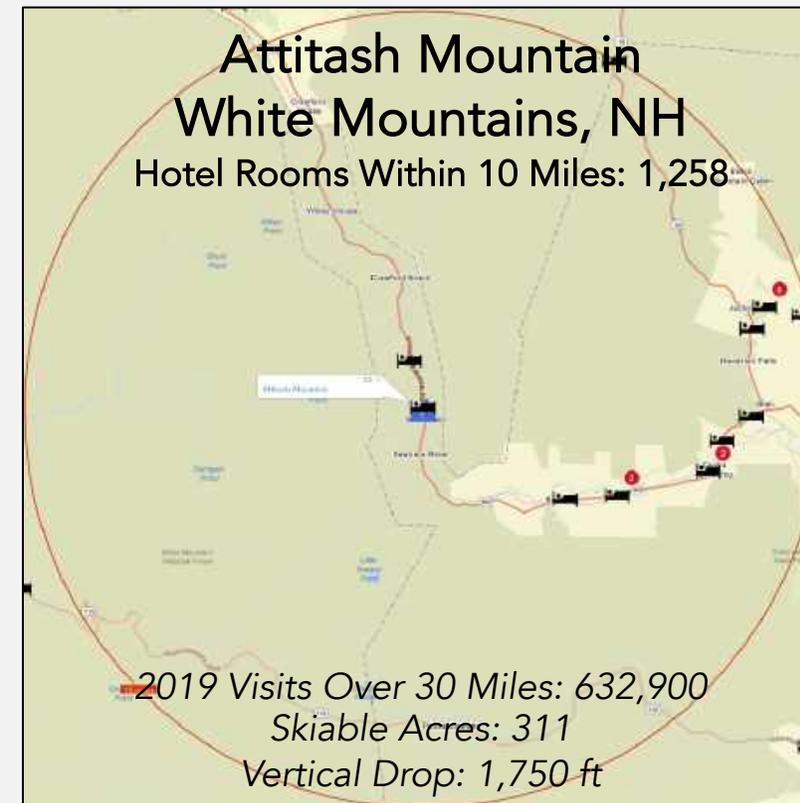
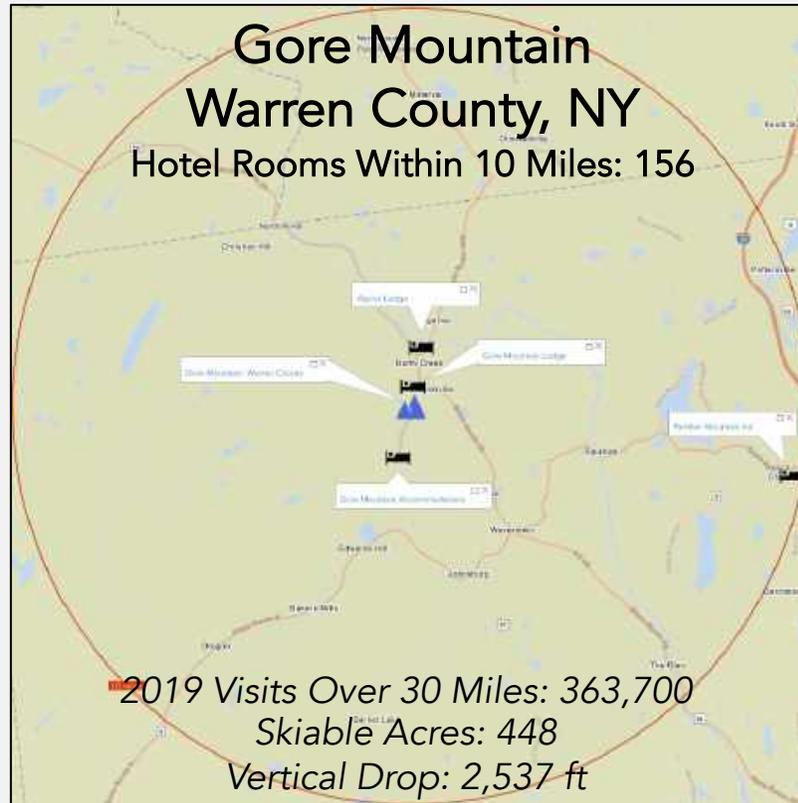
The best performing ski mountains have a large number of nearby hotels, allowing for long distance tourists to stay and play all in one space. Warren County should look into developing hotels around Gore Mountain to develop their strongest winter asset into a destination vacation spot as the other mountains have developed.

Warren County vs Woodstock Visitation



In 2019, Woodstock and the White Mountains attracted visitors from the Boston-Cambridge-Newton MSA, New Hampshire, Rhode Island, Connecticut, Massachusetts and Maine. The main overlap in attraction between Warren County and Woodstock occurred in Springfield, Massachusetts, Worcester, Massachusetts and the Boston-Cambridge-Newton MSA.

Ski Mountain Hotel Availability Comparison



Attitash Mountain has more than 8 times the number of hotel rooms within 10 miles compared to Gore Mountain. Hotel availability makes it a better destination for tourists as everything they need is in one place. When looking at skiable acres and vertical drop, Attitash Mountain is not as good as Gore, but its hotel availability and its close proximity to other mountains help it attract almost twice as many visitors from over of 30 miles compared to Gore and Warren County.

HSP interviewed the staff of Visit White Mountains to better understand the organization and White Mountains. The following points list the key takeaways:

- Visit White Mountains only focuses on the spring, summer and fall seasons of tourism to the White Mountains. The spring accounts for 15 percent of their marketing budget with the summer accounting for 75 percent and the fall accounting for 10 percent. The organization primarily markets to out of state destinations to people between the ages of 16 and 65, mainly to people in the New England market.
- The most popular areas in the White Mountains include Lincoln, Woodstock, North Conway and the Mount Washington Valley.
- The major ski mountains in the region have developed mountain biking trails, gondola rides and zipline courses to enjoy the mountains in the spring, summer and fall.
- The main attractions in the White Mountains region include the Washington Cog Railway, Santa's Ville Amusement Park, Story Land Amusement Park and Echo Lake/Franconia Notch.
- Visit White Mountains does not work with local festivals or events but will occasionally indirectly assist with marketing efforts.
- The White Mountains region does not compete for sports or convention business which is not uncommon for New Hampshire.

HSP analyzed the White Mountains region as a competitive destination, the following implications were drawn.

What They Do Best:

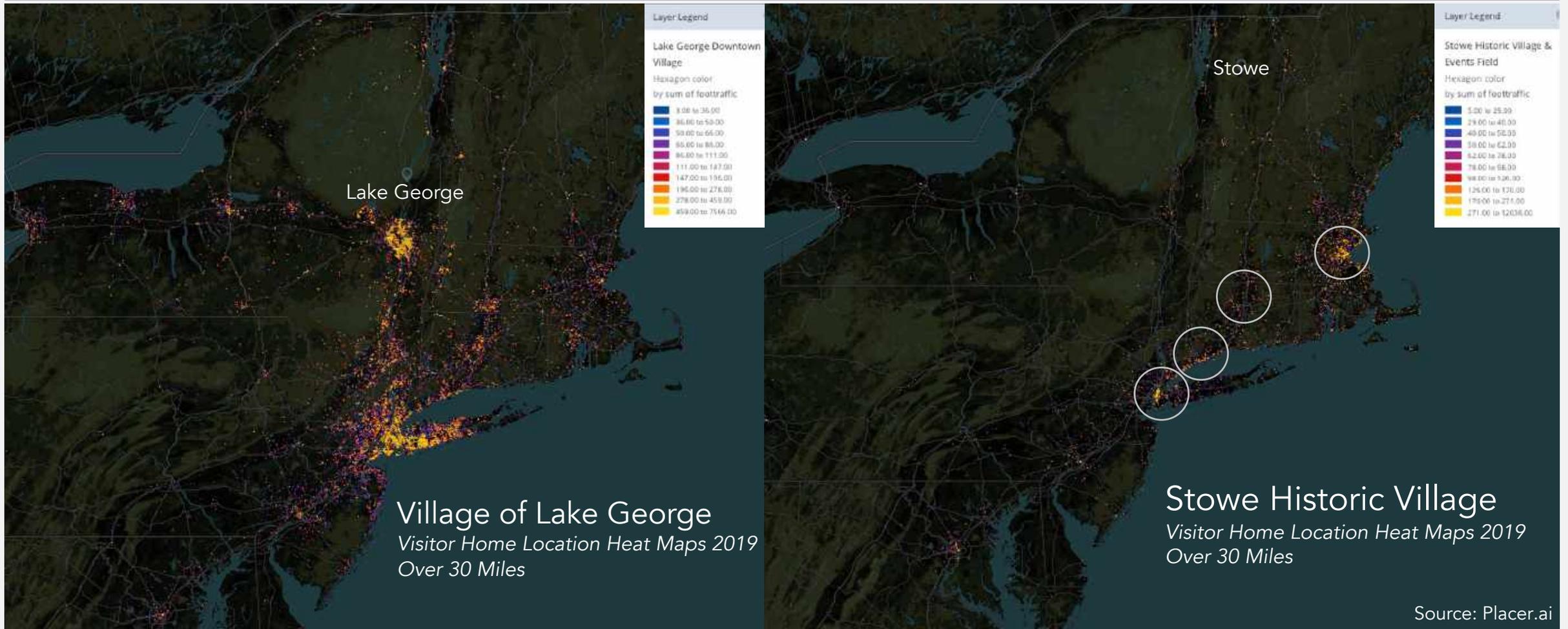
Woodstock does a good job at navigating seasonality. This is in part due to their strong hiking and skiing topography.

The winter is their peak tourism season and by creating a separate tourism organization for their peak season, it allows Woodstock to focus on preparing for the winter throughout the year.

Why They Are a Good Competitor:

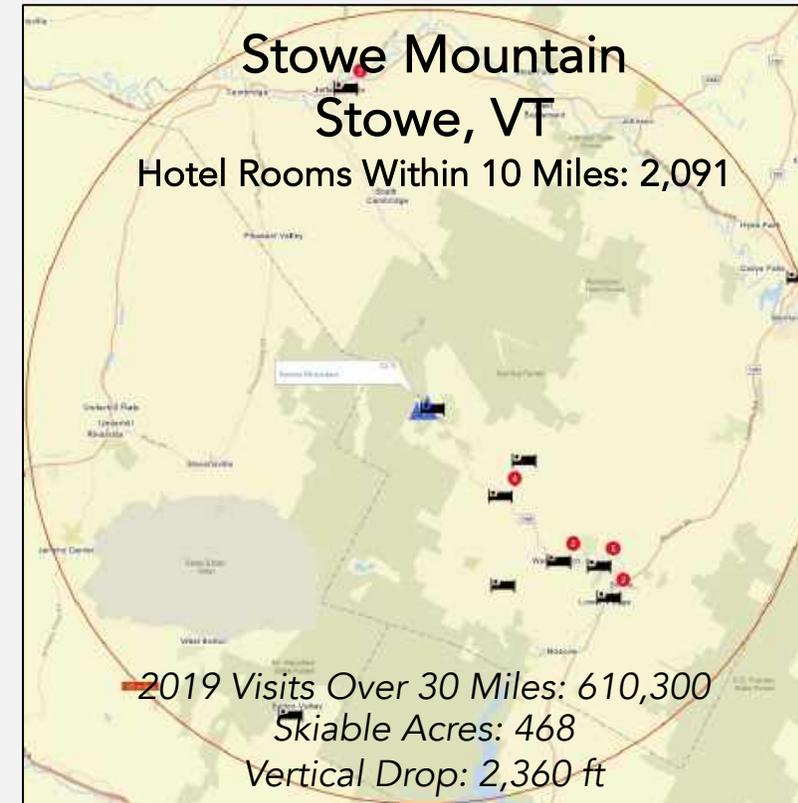
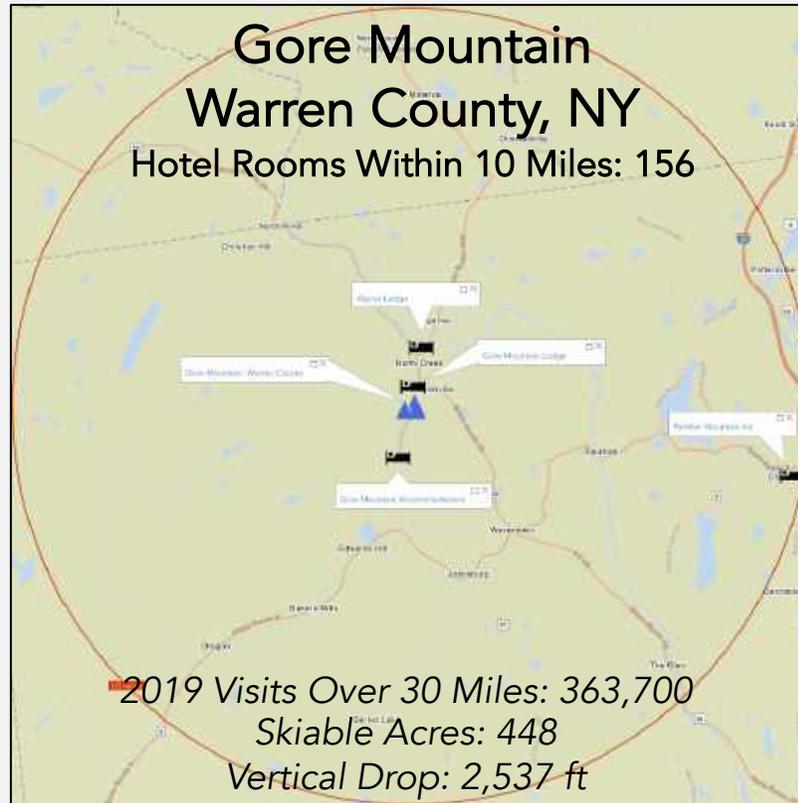
Woodstock and the White Mountains are a strong competitor to Warren County during the winter months because of the supply of skiing options in the White Mountains. The region does not compete for sports or conventions business because of their geographic location. This forces the region to capitalize on their natural assets such as skiing and hiking mountains, waterfalls, foliage and lakes.

Warren County vs Stowe Visitation



In 2019, Stowe attracted visitors from the Boston-Cambridge-Newton MSA, Vermont, New Hampshire, Rhode Island, Connecticut, Massachusetts and Maine. The main overlap in attraction between Warren County and Stowe occurred in the Boston MSA, the New York City MSA, and Connecticut.

Ski Mountain Hotel Availability Comparison



Stowe Mountain has a sizeable number of hotel rooms within 10 miles. Hotel availability makes it a better destination for tourists as everything they need is in one place. When looking at skiable acres and vertical drop, Stowe Mountain is not as good as Gore Mountain, but its hotel availability and marketing techniques help it attract around 250,000 more visitors from outside of 30 miles compared to Gore and Warren County.

HSP interviewed representatives of Go Stowe. The conversation is summarized below.

Seasonality

Stowe is the self proclaimed, “ski capital of the east.” According to the CVB the summer and the fall are just as busy as the winter (though geofencing data does not reflect this).

Summer – The area see lots of visitation for its world class mountain biking and hiking. During this time the area is known for its maple trees.

Winter – The majority of visitors come for skiing and Nordic trails. The area has trails for experts and beginners.

Fall – larger international travelers.

The mud months/stick seasons are mid-April through May and late October to December. During these mud months, most of the local restaurants close for a couple of weeks and do seasonal cleaning.

Visitors

Stowe’s competitors consist of ski resorts and hiking destinations in the northeast. The CVB noted these areas are predominantly Boston, NY, CT, MA, PA, and MD.

The ski resorts that are most competitive are the ski resorts that are owned by Vail, as it is an easy option for Epic Pass holders. These mountains are:

- Mount Snow (VT),
- Hunter Mountain (NY),
- Attitash, Wildcat and Crotched Mountains (NH),
- Liberty, Roundtop, Whitetail, Jack Frost and Big Boulder Mountain (PA).

Most of the visitors to Stowe are within a drivable distance. When air travelers visit the area, they most often use the Burlington Airport which is 45 minutes away.

Data

To track success within tourism, Stowe uses hotel occupancy data from participating hotels (about 50 percent of available hotel rooms in the market).

They also use taxable receipt data to compare year over year changes.

HSP analyzed Stowe as a competitive destination, the following implications were drawn.

What They Do Best:

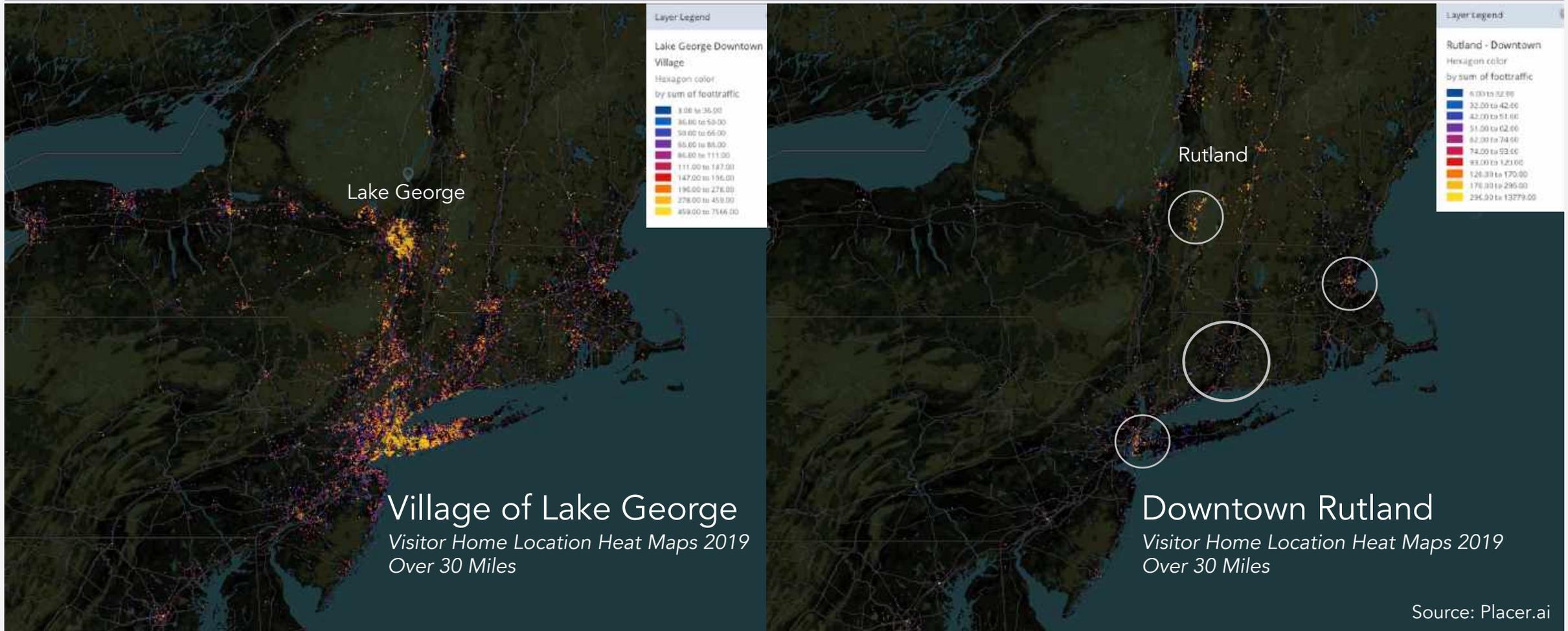
Stowe has premier skiing opportunities with nearby hotels, allowing for easy access from out-of-town visitors. While they view themselves as a year-round destination, geo-fencing analysis shows they are really a winter destination. The best takeaway from Stowe for Warren County is the proximity of hotels to ski attractions.

Why They Are and Are Not a Good Competitor:

Stowe and Warren County both have opportunities to ski and have premier hiking. The transportation factor for both destinations are relatively similar. They both have large drive-in populations and are essentially equidistant from major airports.

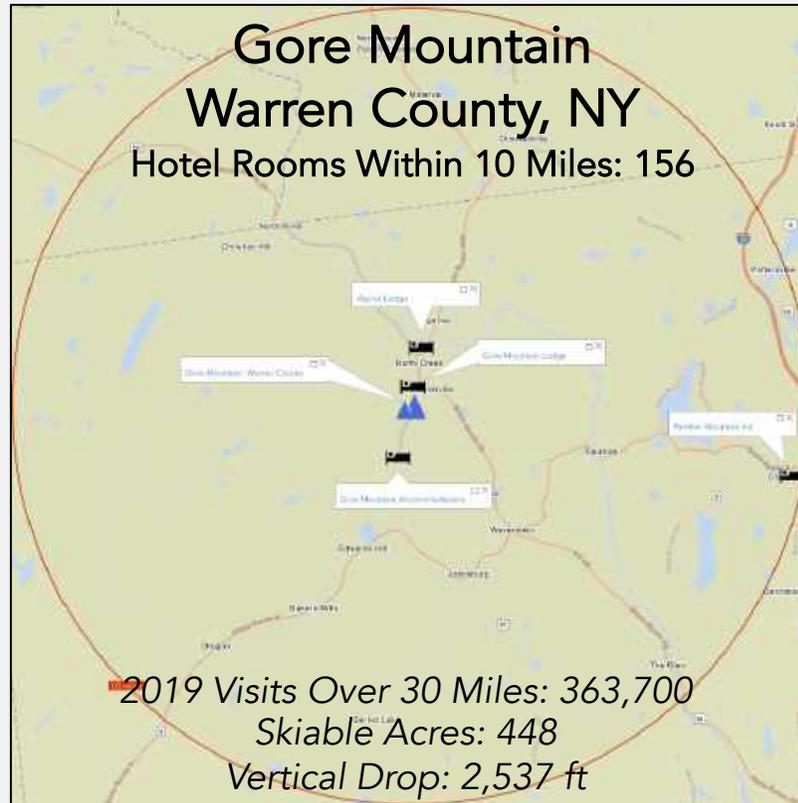
Stowe and Warren County both pull visitors from the eastern northeast down to New York City, while Stowe pulls from the more north and more east parts of the U.S.

Warren County vs Rutland Visitation



In 2019, Rutland attracted visitors from Vermont, the Boston MSA, New Hampshire, Connecticut, Massachusetts, the New York City MA and Maine. The main overlap in attraction between Warren County and Rutland occurred in the Boston MSA, the New York City MSA, Connecticut and Southwestern Vermont.

Ski Mountain Hotel Availability Comparison



Killington has an abundance of hotels and rooms within 10 miles of the mountain. Hotel availability makes it a better destination for tourists as everything they need is in one place. A plethora of hotels and higher quality skiing are some of the top reasons Rutland's mountain garners more visits from visitors outside of 30 miles compared to Gore.

The Rutland Tourism body declined HSP's request for an interview. HSP analyzed Rutland as a competitive destination, the following implications were drawn.

What They Do Best:

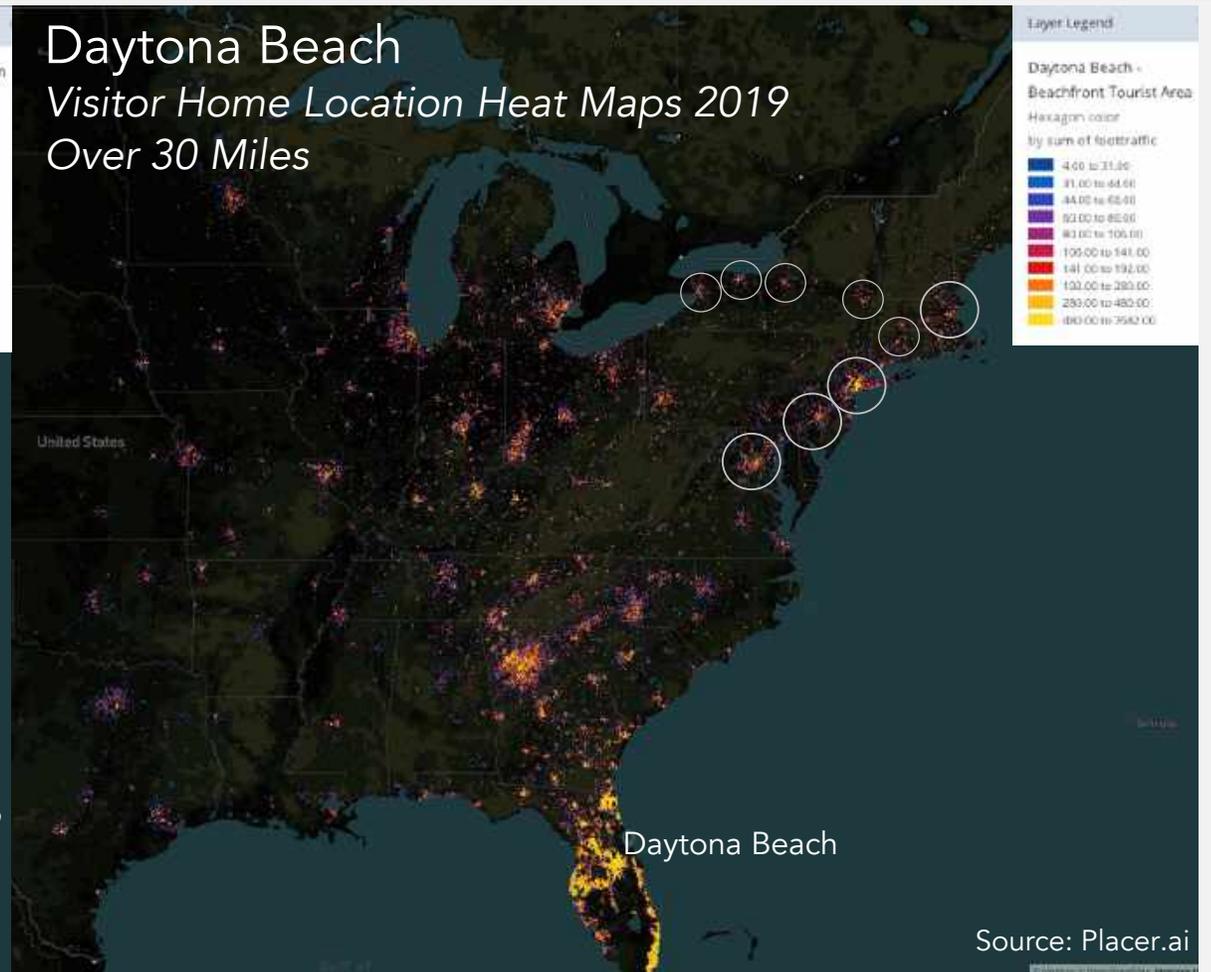
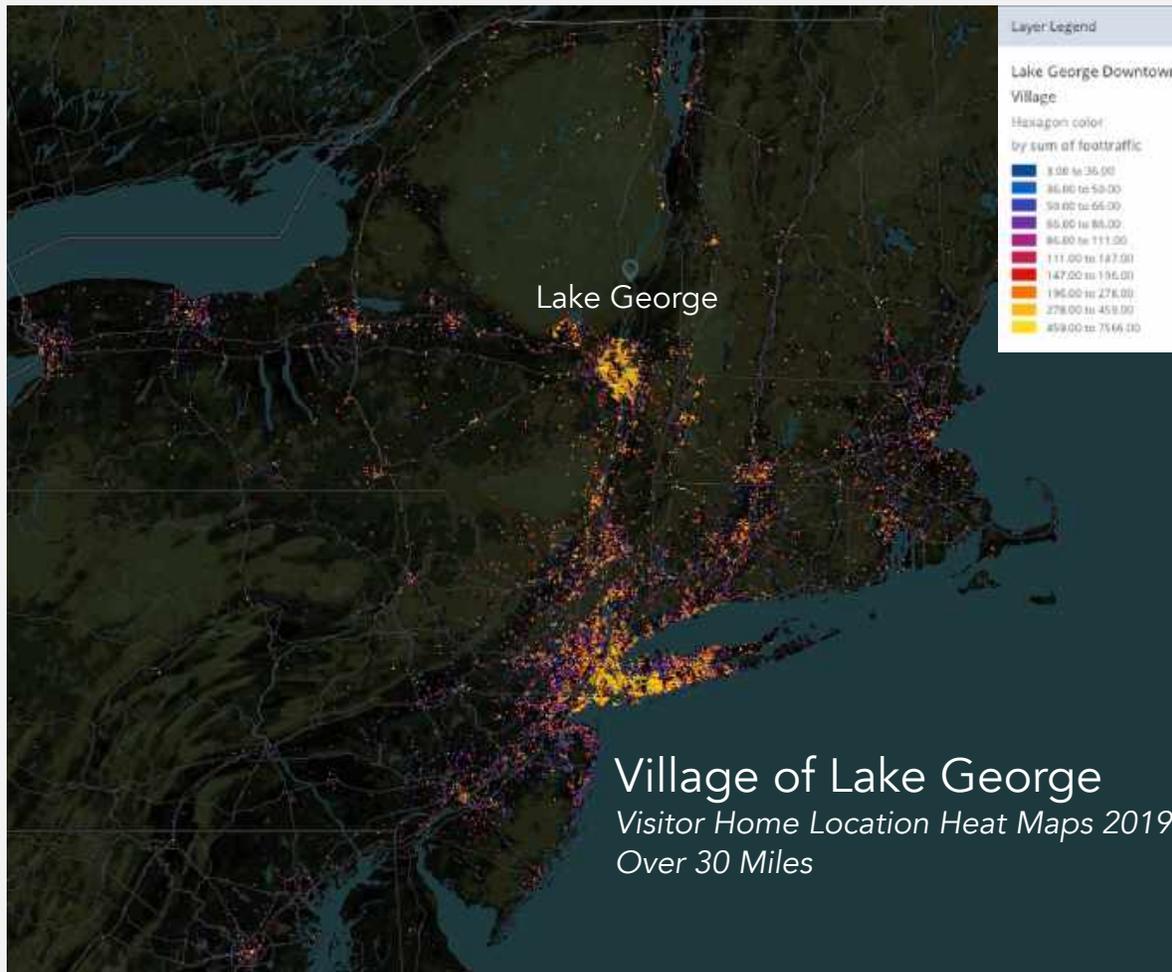
Rutland leverages its large ski mountains throughout the summer and winter with hiking and skiing. While HSP was not able to speak with tourism representatives in the market, conclusions can be drawn that this is in part due to the high density of hotels near the mountain. Creating a stay and play destination with large hotel clusters helps Rutland succeed. Rutland's use of hotels and mountains should be Warren County's greatest takeaway.

Rutland has a strong special events schedule throughout the year, but Warren County surpasses them in terms of quality and in quantity.

Why They Are a Good Competitor:

Rutland is roughly a 50-mile drive to Warren County making it one of the closest competitive destinations in the focus group. The proximity, similarity of hiking/skiing assets and similar target markets make Rutland a strong alternative destination for outdoor enthusiasts. Rutland has been more successful at attracting hiking and skiing visitors in the past, but should Warren County adjust its hotel assets properly, Warren County is set to take become a stronger competitor for these same visitors.

Warren County vs Daytona Beach Visitation



In 2019, Daytona Beach attracted visitation from all over the country. Daytona's tourism experience is unique compared to other destinations in the competitive set. Despite its location in Florida, Daytona attracts visitation from the Northeast, mainly overlapping in the New York City MSA, Boston MSA, Philadelphia MSA, Washington D.C. MSA, Connecticut and Upstate New York.

Daytona Beach Event Funding Best Practice

The Daytona Beach Area Convention & Visitors Bureau (CVB) offers funding for non-local **marketing** for events with dates and activities that have the ability to **prove direct impacts on increased room nights during slower seasons** within the Daytona Beach Area. Events cannot occur around holidays or dates of established events.

Criteria: New Events

New Events/In-Development (potential funding: \$1,000-\$15,000) should:

- Be an inaugural event or less than five years old
- Have the potential to develop into an annual event
- Host activities that span at least two full days
- Have the potential to draw out-of-area guests to help drive overnights stays

Criteria: Established Events

Annual Events/Established Events (potential funding: \$5,000-\$25,000) should:

- Be more than five years old
- Demonstrate year-over-year increases in attendance levels
- Host activities that span 3-7 full days
- Have a positive impact on the community
- Demonstrate overnight stays from the Southeast, U.S. and/or internationally

Featured Daytona Beach Annual Events



Speedweeks & DAYTONA 500

February 15 - 20
250,000 visitors



Jeep Beach

April 25 – May 1
200,000 visitors
20,000 jeeps



Bike Week

March 4 - 13
500,000 visitors



Welcome to Rockville

May 19 – 22
161,000 visitors



Spring Turkey Run

March 25 - 27
150,000 visitors



Biketoberfest

October 13 – 16
125,000 visitors

HSP analyzed Daytona Beach as a competitive destination, the following implications were drawn.

What They Do Best:

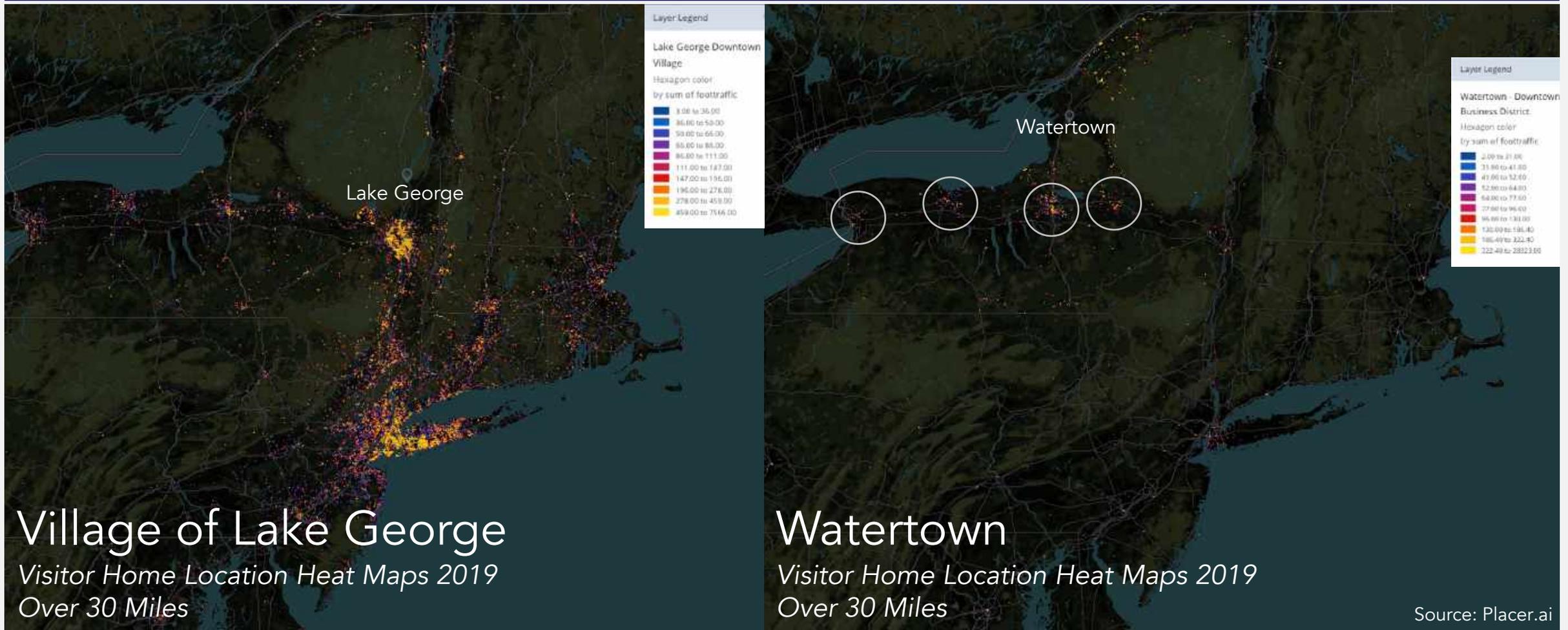
Daytona Beach is a year-round destination with consistent warm weather and nationally renowned events such as the Daytona 500. Daytona hosts other notable events such as Bike, Week, Biketoberfest, Welcome to Rockville and Jeep Week that attract various groups of people with different interests to the area. Daytona has a unique system for funding these events that makes it easier for people to host events generate room nights for the market. Daytona Beach also has a successful convention center and arena located on the ocean that makes it a compelling destination for meetings, conventions and entertainment in the larger region.

Why They Are a Good Competitor:

Daytona Beach was determined to not be a relevant competitor, as its location and climate allow it to be a year-round destination by nature. While Daytona Beach has a strong events market, the tourism assets/experience is different from what Warren County provides. HSP determined that destinations in the northeast should be the focus of the study.

Daytona Beach pulls from the same areas that Warren County does, as Daytona and the rest of Florida pull from the entire eastern United States.

Warren County vs Watertown Visitation



Watertown is smaller competitive destination compared to other destinations in the competitive set. In 2019, Watertown primarily attracted visitors from Buffalo, Rochester, Syracuse, Utica and the Northern Adirondack Region. Warren County attracted visitors from many of these same markets but attracted more visitors from nearly every part of the Northeast.

The Watertown Tourism body declined HSP's request for an interview. HSP analyzed Watertown as a competitive destination, the following implications were drawn.

Why They Are a Good Competitor and Why They Are Not:

Watertown may be a competitor because it is another town in the state of New York with access to large bodies of water. HSP has determined Watertown to not be a strong competitor for Warren County. The physical assets are very different and their volume of tourism is not strong as shown by the occupancy tax collections.

Best Takeaways

HSP provided an overview of best competitor practices for Warren County to take note of throughout the analysis.

Sports Tourism

Essex County, NY

Albany, NY

Cape Cod, MA



Meetings & Events

Essex County, NY

Saratoga Springs, NY

Albany, NY

Hershey, PA

Atlantic City, NJ



Special Events

Saratoga Springs, NY

Hampton Beach, NH

Rutland, VT

Daytona Beach, FL



Funding & Structure

Woodstock, NH

Daytona Beach, FL



Strong Opportunities

Sports Tourism - To fill the winter calendar, there is a potential opportunity to develop an indoor youth sports facility to host large tournaments (hockey, basketball, volleyball etc.). Warren County would experience stronger winter visitation if Gore Mountain had more hotels within the immediate area.

Special Events – Warren County already has an established and robust calendar of special events. As experienced with IceCastles, these events have done well at bringing new visitors to the market. Events give a reason for store owners to return to the county during winter months. There is room to grow the number of events.

Funding & Structure – Daytona Beach provides a case study on performance-based event funding for marketing dollars. Funding varies for new and established events. White Mountains shows the power of separate seasonal marketing entities.

Non-Optimal Opportunities

Meetings & Events – Warren County does not have a large-scale facility to host conventions. The county is situated further from the airport and has nearby towns with established convention centers which would hinder a potential project.



Festival & Event Case Studies

Cold Weather and Winter Festivals and Events; U.S. and Abroad

Festival/Event Name	City and State, or Nation	Duration or Timing	Unique Quality that makes it Stand Out (Description)
Quebec Winter Carnival	Quebec City, Quebec, Canada	9 days	World's Largest Winter Carnival, dating to 1894. Parades, ice sculpting, live music, Lighted-up streets
Shetland Viking Fire Festival	Lerwick, Scotland	24 hours, Last Tuesday in January	People dressed in Viking gear celebrating historic Viking culture
Winter Carnival	Steamboat Springs	5 days	Fireworks, skiing races, downhill skiers with lighted flares
Niagara Icewine Festival	Niagara Fall, Ontario, Canada	15 days	35 wineries participate, wine and food sampling, live music, longest lighted streets in North America
World Ice Art Championship	Fairbanks, AK	Mid Feb - End of March	Since 1930, creating art out of blocks of ice by teams of four
Portland Winter Light Festival	Portland, OR	11 days	Lighted art installations by world artists, appearing around the city, acrobatic light displays, parades and interactive exhibits
Branson & Scenic Railway	Branson, MO	Holiday & winter season	Over 1 million lights, organized trails to view the city's best decorations, with parade, 1 hour train ride turned into the "Polar Express"
Snowdown Durango	Durango, CO	Jan 26 - Jan 30	Events spread across Durango with a different theme each year. Best Bloody Marys, Bed races, snow golf, Snowdown Follies,
A Colonial Christmas	Williamsburg, VA	Dec 2 - Feb 20	Since 1945, Yorktown, transports visitors back to Colonial Days, ice skating at Liberty Ice Pavilion
Winter Festival of Lights	Niagara Fall, Ontario, Canada	Nov 19 - Jan 31	Illumination Light Festival encompassing a 5 mile route and more than 120 light shows
Let It Go	Brainard, MN	Winter season	"Calling all Queen Elsa-wannabes," artists create walk-through castles, with tunnels, slides and frozen fountains
Skate On	Chicago, Edina, Madison, Other	Winter season	Ice Skating Ribbons: artificial trails that snake through cities, parks, scenic areas, under bridges.
Sapporo Snow Festival	Sapporo, Japan	February	2 million each year come see the illuminated ice castles. Snow slides, snow maze, food & drink stalls and live music

Source: Placer.ai and HSP

The table above shows a compiled list of unique winter events and festivals from around the world that HSP determined to be among the top winter festivals and events. Beyond comparing tourism to competitive destinations, festivals and events can provide compelling case studies for functionality, additional events, marketing efforts and funding methods.

Case Study Festivals



Quebec Winter Carnival, Canada



Durango, Colorado



Winter Festival of Lights, Niagara Falls



Sapporo Snow Festival, Japan



Colonial Christmas, Virginia



Steamboat Springs Winter Carnival,
Colorado

Leavenworth, Washington



Tourism Budget Comparison

Year	Use of Funds - Visitor Bureau Spending									
	2022 Warren Co. Occ. - 0002	2022 Warren Co. Tourism - 0001	2022 Warren County Combined	2021 ROOST Adirondack	2019 Discover Saratoga	2019 Discover Albany	2019 Hershey-Harrisburg RVB	2018 Cape Cod Chamber	2019 1000 Islands Regional Tourism	2019 Daytona Beach CVB / HAAA
Tourism Department										
Total Funding/Revenue	\$3,227,000	\$2,448,689	\$5,675,689	\$2,978,566	\$1,766,178	\$1,917,729	\$3,903,542	\$2,132,527	\$987,438	\$11,111,900
Advertising/Promotion	\$600,000	\$1,690,290	\$2,290,290	\$1,803,180	\$226,335	\$138,901	\$864,261	\$438,327	\$706,024	\$6,191,521
% of Revenue	19%	69%	40%	61%	13%	7%	22%	21%	72%	56%
Salaries	-	\$483,012	\$483,012	\$1,716,711	\$809,945	\$850,765	\$1,536,537	\$676,002	-	\$1,265,741
% of Revenue	-	20%	9%	58%	46%	44%	39%	32%	-	11%
Occupancy Tax Collections			\$6,895,987	\$6,594,420	\$663,000	\$8,140,240	\$8,000,000	\$11,654,890	\$373,300	\$20,016,569
Collection Entity			Warren County, NY	Essex County, NY	Saratoga Springs	Albany, NY	Dauphin County, PA	Barnstable County, MA	Jefferson County, NY	Volusia County, FL
Occ Tax Year			2021	2021	2019	2019	2021	2016	2021	2021

Source: Various Individual Organizations, Counties

HSP gathered available information on budgets of various competitive destination tourism entities. For many of the destinations, information was not readily available and different destinations have varying structures. Each CVB spends their budget in different ways. Daytona Beach provides a good case study on usage of budget dollars for special events.

Warren County does not differ greatly from the typical usage of CVB spending dollars from the average tourism body.

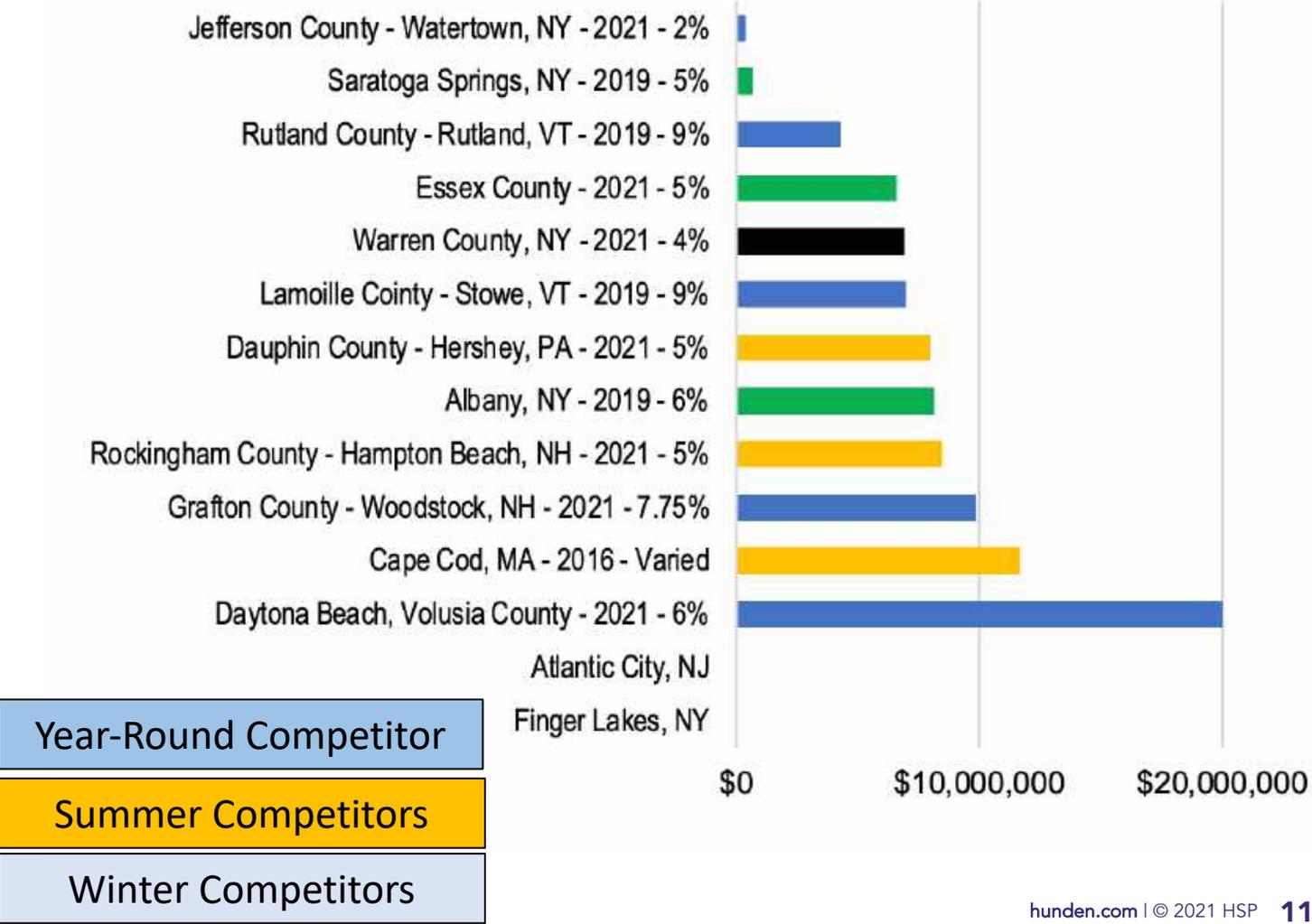
Occupancy Tax Collection Comparison

Each destination collects and publishes occupancy tax collections in different ways. Some areas have bed taxes on state, county and city levels, some only collect at the county level.

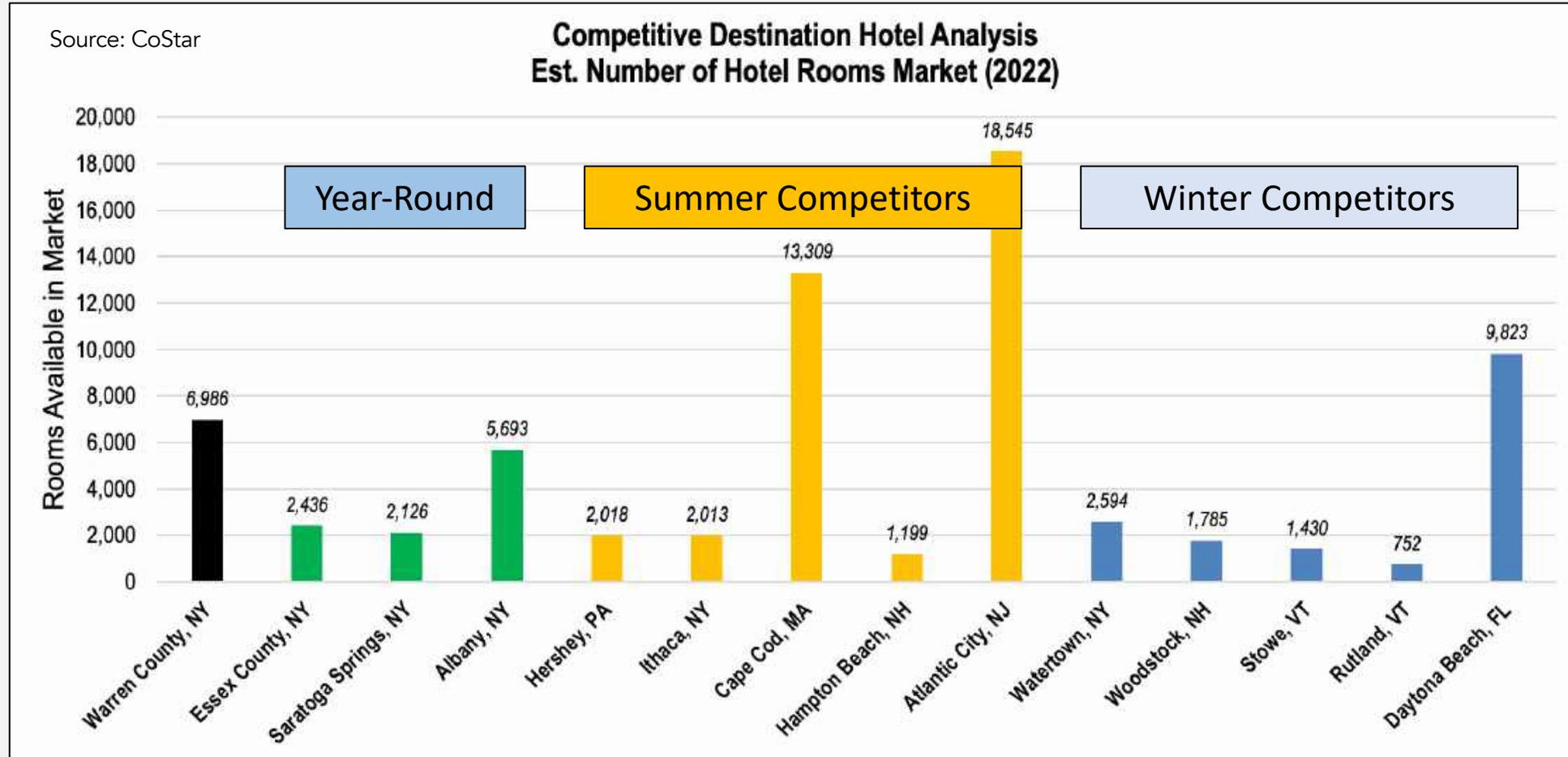
The table shows the information HSP was able to collect to show the difference in taxes collected by destination.

Warren County has a lower occupancy tax rate than most, yet generates a strong amount of revenue. With an increase in the rate, the County would still be competitive, yet generate more revenue.

Occupancy Tax Collections Competitive Destination Comparison



Number of Hotels per Market



The table above shows the number of hotel rooms available in each competitive market. With ongoing construction/renovations the numbers may not be exact, but provide a good basis to compare the market's expectation on annual tourism/hotel demand. Comparing these metrics with occupancy and RevPAR (revenue per available room) metrics will help assess each market's performance.



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Hunden Strategic Partners is a full-service real estate development advisory practice specializing in destination assets.

With professionals in Chicago, San Diego and Minneapolis, HSP provides a variety of services for all stages of destination development in:

- Real Estate Market and Financial Feasibility
- Economic, Fiscal and Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
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The firm and its principal have performed more than 800 studies over the past 25 years, with more than \$6 billion in built, successful projects.