

Dutchess County, NY Comprehensive Travel Market Research & Strategic Planning

Prepared for:

- Dutchess Tourism



Study Conducted: September 2018 – November, 2018
Research Report Submitted – November 15, 2018

Research Conducted by:
Young Strategies, Inc.
Charlotte, NC

Dutchess Tourism Travel Market Research

RESEARCH OBJECTIVE:

The following research segments were conducted to update prior data (2012/13) and develop new strategies for Dutchess Tourism that:

- Update visitor profile research and develop a comparative visitor profile report. The data and report identify where successes have occurred and where improvements can be made to the program of work.
- Update lodging market research including STR data analysis. Particular emphasis is placed on identifying opportunities to increase occupancy and room demand during shoulder seasons and low occupancy periods.
- Lead strategic planning session with staff and Board of Dutchess Tourism. Berkeley Young will present the research updated data and lead a strategic planning session in Dutchess County with Dutchess Tourism Board and staff.
- Identify the need for additional research and tracking.

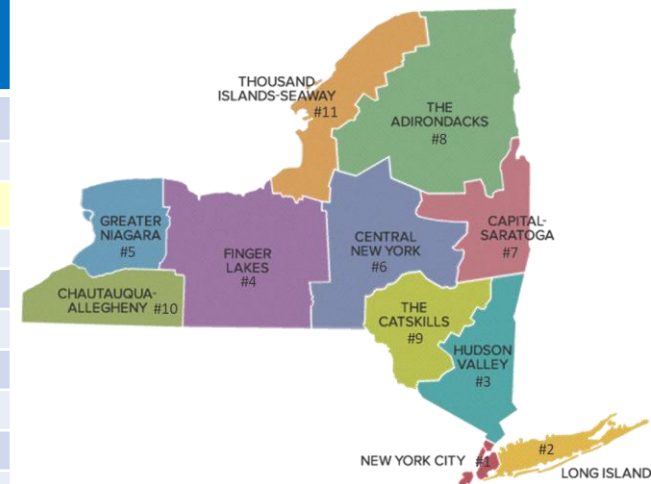
SURVEY RESPONSES:

- Visitors – 2,668 surveys
- Residents of Neighboring Counties – 785 surveys
- Residents – 1,353 surveys and Part-time Residents – 117 surveys
- DestinationNext Community Leader Surveys – 81 Respondents
- Lodging Surveys – 20 out of 41 hotels responded plus STR data



2017 Travel Related Spending & Metrics for New York State Travel Regions

11 Regions of New York	Regional Ranking in State	% of Sales in State	% of Labor in State	2017 Direct Visitor Spending '000	% of Growth 2016/17
New York City	1	65%	51%	\$ 44,184,748	4.4%
Long Island	2	9%	10%	\$ 5,870,546	4.0%
Hudson Valley	3	5%	7%	\$ 3,664,056	3.6%
Finger Lakes	4	5%	7%	\$ 3,048,050	2.4%
Greater Niagara	5	4%	7%	\$ 2,666,342	5.5%
Central New York	6	3%	5%	\$ 2,351,046	5.7%
Capital-Saratoga	7	3%	5%	\$ 2,010,982	4.6%
Adirondacks	8	2%	3%	\$ 1,421,767	5.5%
Catskills	9	2%	2%	\$ 1,319,364	7.1%
Chautauqua-Allegheny	10	1%	1%	\$ 552,847	2.0%
Thousand Islands	11	1%	1%	\$ 543,319	4.2%



Hudson Valley 2017 Regional Tourism Impact	Rank	% of Sales in Region	Traveler Spend '000	Labor Income '000	Employment	Local Taxes '000	State Taxes '000
Westchester	1	51%	\$1,872,029	\$1,076,504	24,527	\$124,227	\$102,951
Dutchess	2	16%	\$601,563	\$332,307	11,239	\$43,007	\$33,083
Orange	3	14%	\$492,488	\$281,188	9,870	\$33,482	\$27,084
Rockland	4	13%	\$480,015	\$264,814	9,060	\$31,516	\$26,398
Columbia	5	4%	\$154,625	\$75,650	2,417	\$9,603	\$8,504
Putnam	6	2%	\$63,336	\$30,493	1,426	\$4,584	\$3,483
TOTAL		100%	\$3,664,056	\$2,060,957	58,539	\$246,419	\$201,503

Note: While Ulster is outside of the Hudson Valley region, Ulster's data is provided for comparative analysis.

	\$586,983	\$304,248	9,208	\$40,036	\$32,281
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DUTCHESS COUNTY REPORT CARD

Dutchess County, NY	2012	2017	% of Growth
STR Lodging Room Inventory (Supply)	951,814	1,013,501	+6.5%
STR Occupancy Rate	58.7%	65.0%	+10.7%
STR ADR (Average Daily Rate)	\$102.24	\$111.80	+9.4%
STR Room Nights Sold/Room Demand	558,277	658,865	+18.0%
TOTAL Room Revenue – calendar year	\$57,080,779	\$73,659,861	+29.0%

Source: STR 6-Year Trend Report

2017 Dutchess Cty Travel Related Tax Relief	2017
Total Visitor Spending	\$601,533,000
State and Local Taxes Attributed to Tourism	\$76,090,000
Direct Travel & Tourism Employment (jobs)	7,903
TAX RELIEF PER HOUSEHOLD	\$711.00

US Hotels – Key Performance Indicators						
Year	Occupancy	% of Change	ADR	% of Change	RevPAR	Change
2011	60.0%	~	\$101.64	~	\$61.06	~
2012	61.4%	2.3%	\$106.08	4.4%	\$64.98	6.4%
2013	62.3%	1.4%	\$110.35	3.9%	\$68.69	5.4%
2014	64.4%	3.4%	\$115.32	4.6%	\$74.28	8.3%
2015	65.4%	1.6%	\$120.29	4.3%	\$78.67	5.9%
2016	65.5%	0.1%	\$123.97	3.1%	\$81.19	3.2%
2017	65.9%	0.9%	\$126.72	2.1%	\$83.57	3.0%

Source: STR annual US Hotel - KPI's, reported annually in STR Hotel News Now.

Dutchess County

Lodging Market Analysis



Summary & Observations:

- Dutchess County, NY currently has **42 hotel/motel lodging properties with approximately 3,020 rooms**. (This number fluctuates regularly as lodging properties add and delete rooms from their inventory).
- **Dutchess County hotel development over the five-year period 2013 – 2018 saw the opening of five new hotel properties, three of them chain-affiliated properties and two independent smaller properties. A total of 259 hotel rooms were added resulting in a 9% increase in total room inventory.** Over one-third (37%) of the county's room inventory is fairly new having been developed between 2000 – 2018, while three properties opened in the 1990's (12%) and the remaining 51% of the room inventory was developed prior to 1988.
- **Market segmentation analysis showed Dutchess County's lodging occupancy is being driven by a combined leisure market totalling 50.8%** which consists of: leisure transient and wedding market (18.1% each), university-related transient(7.6%) and SMERF (7.0%) primarily driving weekends **and business related travel when combined accounting for 42.5% of weekday room demand:** corporate transient (23.3%), skilled workers (13.6%) and group-conference/meeting travel (5.6%). The balance of group related travel (10.6%) and "other" (3.1%) accounted for the remaining room demand.
- **Weekend nights (Friday and Saturday) reported the highest occupancy in Dutchess County lodging properties in the 70% - 80% range while mid-week nights (Tuesday and Wednesday) reported in the 67% - 72% range.** This data confirms Dutchess County's occupancy is well balanced between leisure, weddings and university-related travel primarily driving weekends; while business transient, skilled workers and group business drive mid-week stays. Sunday and Monday nights are slowest year-round which is typical of most lodging markets.

Dutchess County, NY Lodging Study Methodology

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Dutchess County, New York as part of a lodging market analysis commissioned by Dutchess Tourism. A short questionnaire was sent to the Dutchess Tourism database of hotel/motel lodging properties in Dutchess County to estimate the following key metrics projected for the full calendar year 2018: percentage of occupancy driven by eight market segments and annual occupancy. Hoteliers were also asked to provide ranking of market segments for Dutchess Tourism's future sales and marketing efforts and top leisure feeder markets. The survey contained two open-ended questions allowing hoteliers to share any noted changes/shifts in room demand as well as future sales/marketing suggestions for the Dutchess Tourism. Lastly, any property who has been impacted by the film industry was asked to share total room nights sold, total revenue generated as well as whether room nights sold in 2018 was up or down as compared to 2017. Lodging surveys were collected from September through October, 2018.

The Dutchess Tourism hotel/motel database had forty-one properties with approximately **2,950 rooms actively collecting lodging tax** at the time of the YSI lodging study. The Comfort Suites Fishkill with 70 rooms had newly opened in June, 2018 thus, were not included in the survey. **Twenty (20) Dutchess County properties participated in the YSI survey which provided an overall response rate of 58.9%.** This response is considered to be very reliable as well as a highly predictive sample of the overall market based on the size and geographic distribution of the Dutchess County hotel/motel lodging inventory.

Note: The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).



Dutchess County, NY Lodging Inventory – Geographic Segmentation

As was previously reported in the 2013 YSI report, there are three geographically distinct lodging areas within Dutchess County. The following table outlines where the majority of lodging rooms exist by a geographical segmentation, as well as a distinction between hotel/motel inventory versus bed & breakfast inns. More development occurred in the lodging market in the South/Fishkill area accounting for 50% of the county today, up from 44.4% in 2013, while the central-western area of the county surrounding Poughkeepsie fell from 43.3% to 39.1% of the 2018 lodging inventory as compared to 2013.

Geographic Segment	Hotel / Motel Rooms 93.2% - Inventory	B&B / Inns Rooms 6.8% - Inventory	Total Rooms by Area	% of Room Inventory by Area 2018 / 2013
South / Fishkill	1,585	35	1,620	50.0% / 44.4%
Central / Poughkeepsie	1,227	42	1,269	39.1% / 43.3%
North / Eastern / Other	208	145	353	10.9% / 12.3%
Total Inventory	3,020	222	3,242	100.0%

STR Classification Dutchess County Lodging Inventory

Property Classification	# of Properties	# of rooms	% of Market
Luxury	1	36	1.2%
Upper Upscale	4	144	4.8%
Upscale	7	841	27.8%
Upper Midscale	6	529	17.5%
Midscale	9	904	30.0%
Economy	15	566	18.7%

Source: STR

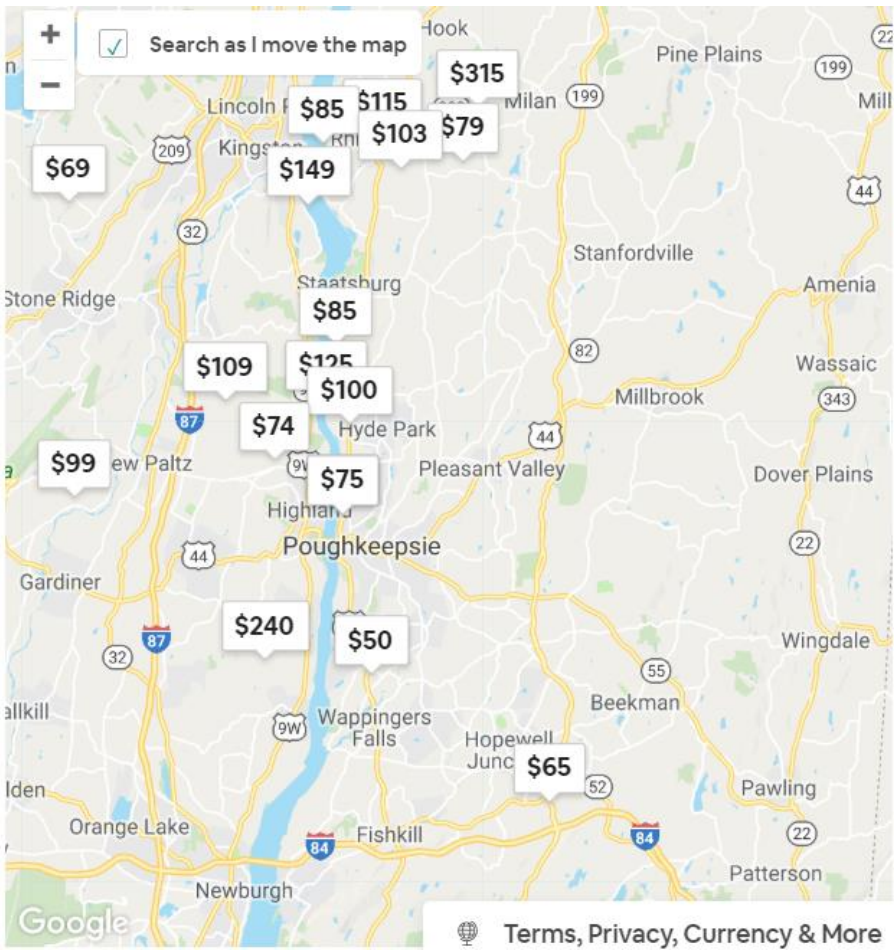
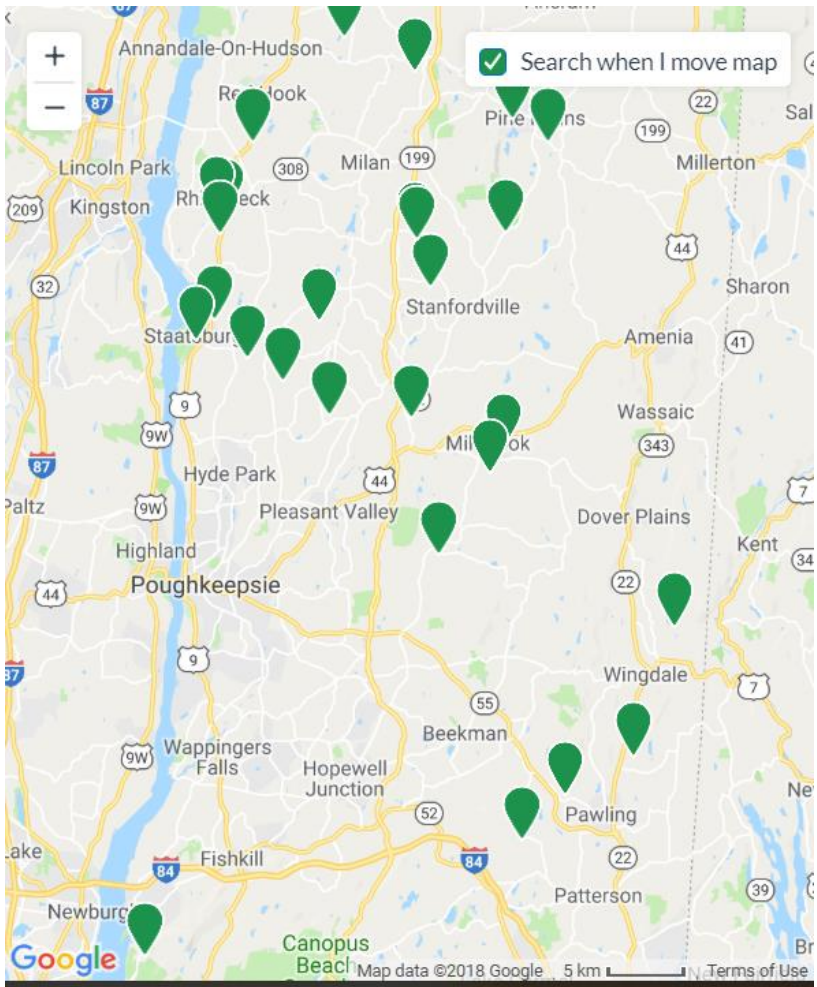
STR Classification Dutchess County Lodging Inventory

Dutchess County Inventory	Rooms	
1970's or Prior – 17 properties = 26.6%	804	26.6%
1980 – 1989 – 8 properties = 24.7%	747	24.7%
1990 – 1999 – 3 properties = 11.8%	356	11.8%
2000 – 2009 – 8 properties = 27.0%	813	27.0%
2010 – 2018 – 6 Properties = 9.9%	300	9.9%
42 TOTAL Hotel/Motel Properties	3,020	100%

Source: STR

Dutchess County, NY Vacation Rentals by Owners

A search on VRBO (Vacation Rental By Owner) for properties available in Dutchess County, NY, pulls up 182 properties available for rental. A search on Airbnb brings up 300+ properties in a variety of price ranges.



Source: VRBO.com

Source: Airbnb.com

Dutchess County, NY STR Data Analysis - Young Strategies purchased lodging data from STR in the form of a 6-year trend report and a 365-daily data report for all STR hotel/motel properties. All tables and charts following reflect the STR data provided in these two reports.

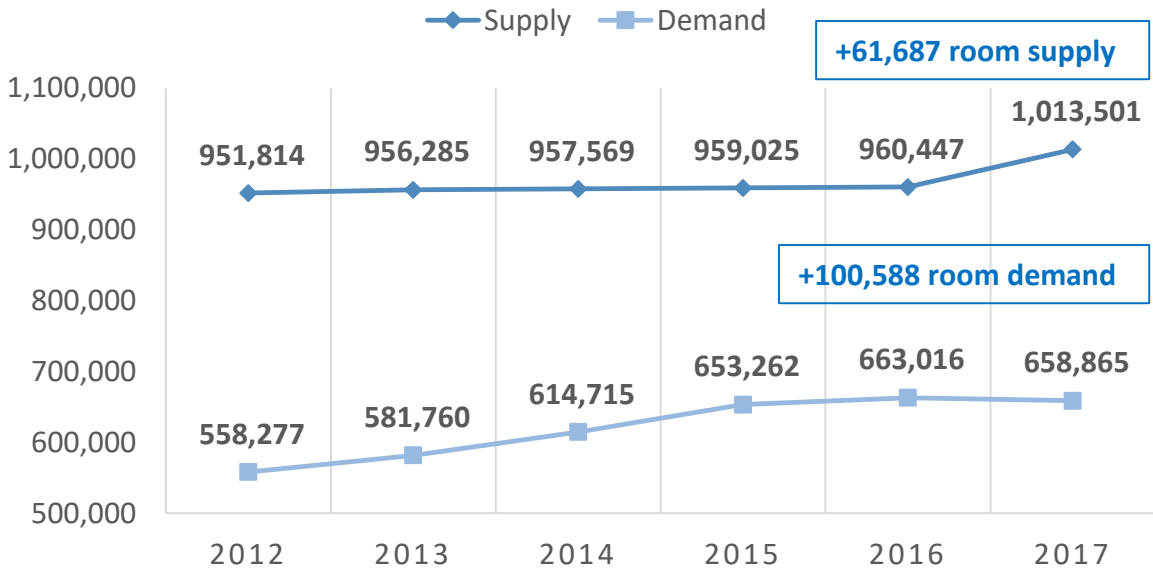
Supply vs. Demand 2012 - 2017				
	Supply	% Chg	Demand	% Chg
2012	951,814	~	558,277	~
2013	956,285	0.5%	581,760	4.2%
2014	957,569	0.1%	614,715	5.7%
2015	959,025	0.2%	653,262	6.3%
2016	960,447	0.1%	663,016	1.5%
2017	1,013,501	5.5%	658,865	-0.6%

Observations:

- Dutchess County experienced growth in room supply over the 6-year time period 2013 – 2017 with an overall increase of 6.5% in 2017 as compared to 2012.
- Dutchess County room demand increased during the same time period but at a much higher rate of 18.0% when comparing total rooms sold in 2017 to 2012.

Note:
All three of the chain-affiliated properties developed in the Dutchess County lodging market over the last three years, 2016 – 2018 opened in Fishkill. Additionally, two other small independent properties opened in Dutchess County, one in Fishkill and one in Beacon. These five properties added an additional 259 rooms, accounting for a total of 9% of the total Dutchess County hotel/motel lodging room inventory.

6-YR SUPPLY VS DEMAND TREND



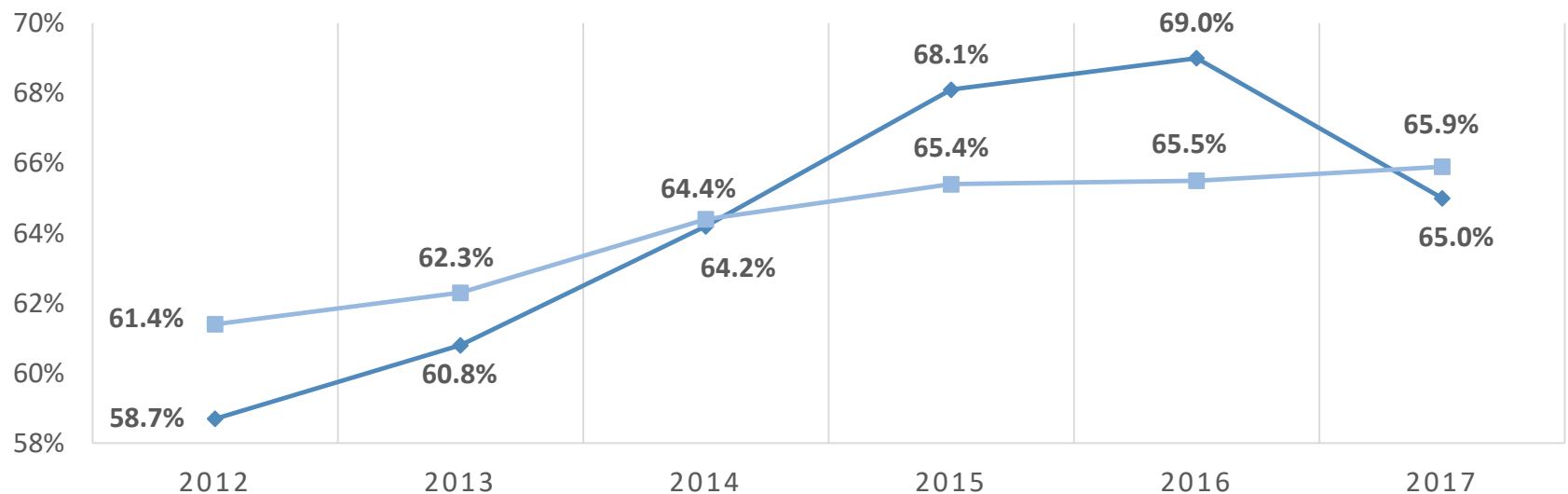
Annual Occupancy Trend 2012 - 2017				
	Dutchess County, NY	% of Chg	National	% of Chg
2012	58.7%	~	61.4%	~
2013	60.8%	3.7%	62.3%	1.4%
2014	64.2%	5.5%	64.4%	3.4%
2015	68.1%	6.1%	65.4%	1.6%
2016	69.0%	1.3%	65.5%	0.1%
2017	65.0%	-5.8%	65.9%	0.9%

Observations:

As seen in the table and chart below, increases in both new lodging room inventory and room demand caused Dutchess County occupancy levels to consistently increase over the 5-year time period of 2012-2016 as well as out-perform National occupancy in both 2015 and 2016. A decline in occupancy was reported in 2017 when room supply again increased 5.5% while demand slightly dropped -0.6%.

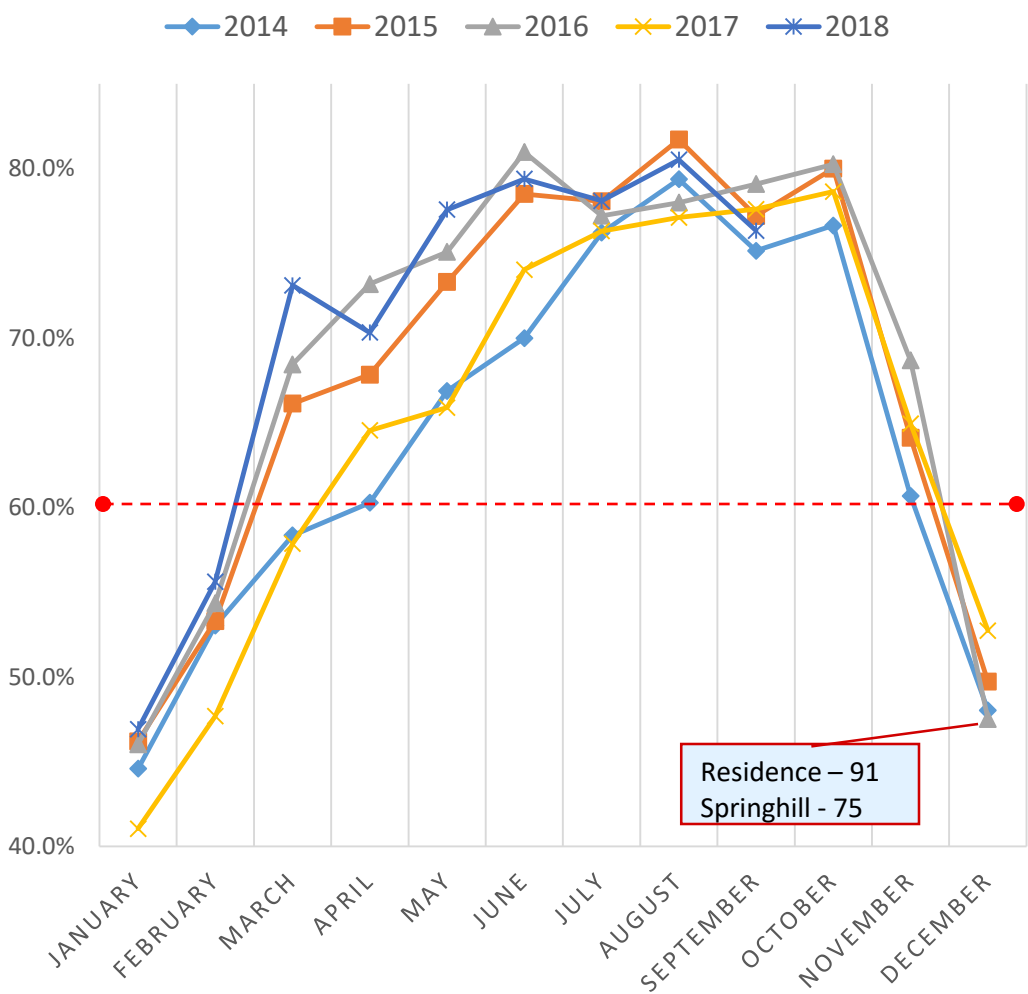
ANNUAL OCCUPANCY TREND

◆ Dutchess County, NY ■ National



Dutchess County Monthly Occupancy Trend					
	2014	2015	2016	2017	2018
January	44.6%	46.2%	46.0%	41.0%	46.9%
February	53.0%	53.3%	54.3%	47.7%	55.6%
March	58.4%	66.1%	68.4%	57.9%	73.1%
April	60.3%	67.8%	73.2%	64.5%	70.3%
May	66.9%	73.3%	75.1%	65.9%	77.6%
June	70.0%	78.5%	81.0%	74.0%	79.4%
July	76.2%	78.1%	77.2%	76.3%	78.1%
August	79.4%	81.7%	78.0%	77.1%	80.5%
September	75.1%	77.2%	79.1%	77.6%	76.3%
October	76.6%	80.0%	80.3%	78.6%	
November	60.7%	64.1%	68.7%	65.0%	
December	48.0%	49.7%	47.5%	52.7%	

MONTHLY OCCUPANCY TREND



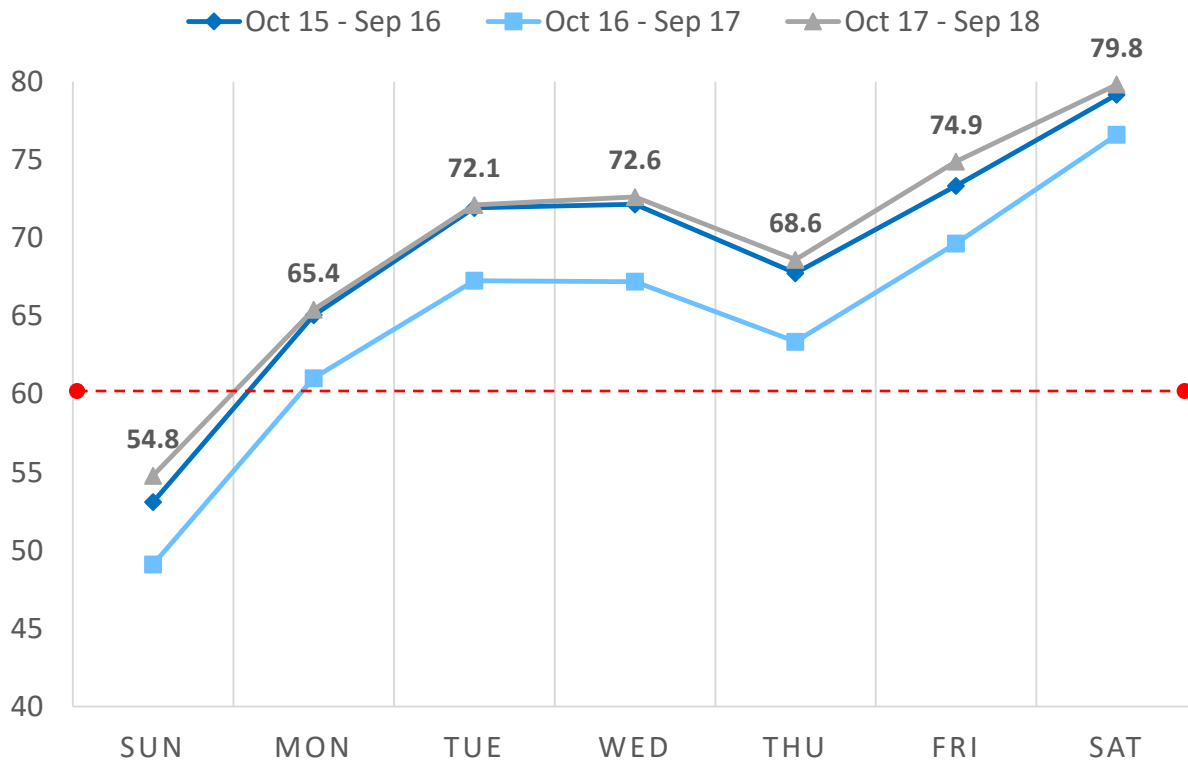
Monthly Occupancy Trends

- Highest occupancy %'s have been consistently reported in the summer months of June through August, followed closely by October, which also reported the highest month of occupancy in 2017.
- Room demand is up in 2018, thus monthly occupancy percentages in 2018 reported higher month-over-month from previous year showing a very positive trend for 2018 thus far.
- December through March are consistently the need periods where occupancy is most likely to dip below the critical 60% mark.

Source: STR

Three Year Occupancy (%)								
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Year
Oct 15 - Sep 16	53.1	65.0	71.9	72.1	67.7	73.3	79.2	68.9
Oct 16 - Sep 17	49.1	61.0	67.3	67.2	63.4	69.6	76.6	64.9
Oct 17 - Sep 18	54.8	65.4	72.1	72.6	68.6	74.9	79.8	69.7
Total 3 Yr	52.3	63.8	70.4	70.6	66.6	72.6	78.5	67.9

3-YR TREND- DAY OF WEEK OCC.



Observations:

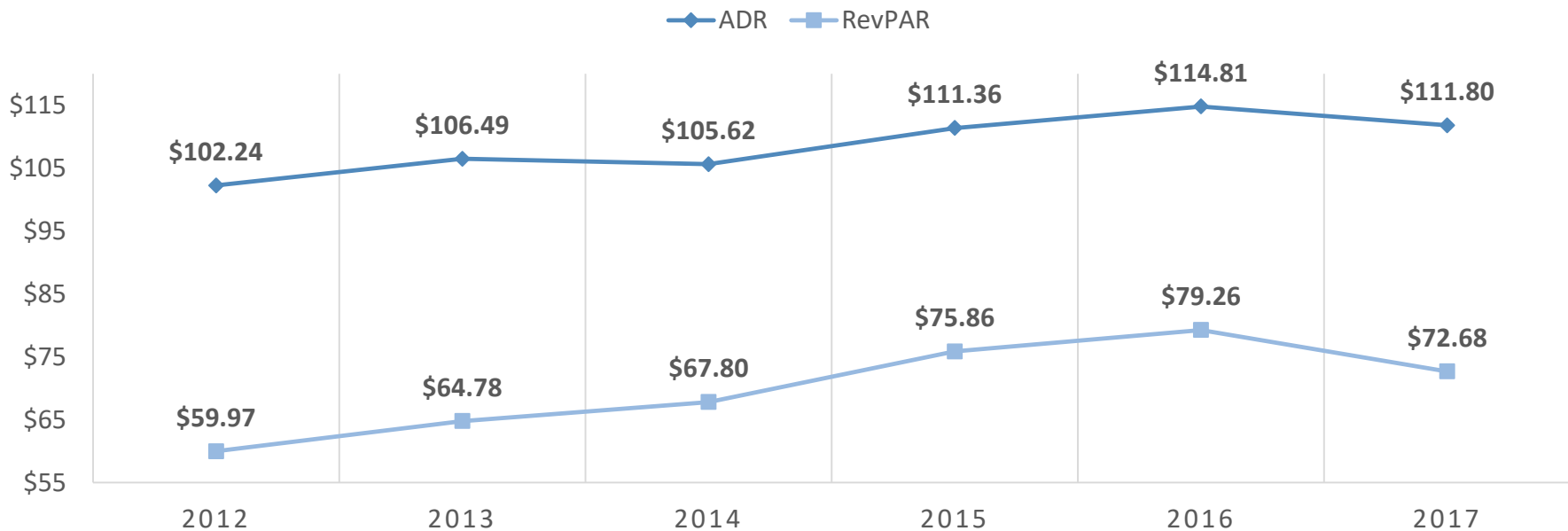
- Data shows weekend nights (Friday and Saturday) run highest occupancy in the 75% – 80% range over the previous 12-months.
- This data is very reflective of the market segmentation data collected in the YSI survey, whereas room demand was reported by Dutchess County hoteliers as follows: leisure and university/college-related transient, weddings and SMERF account for just over half (50.8%) of room nights sold primarily on the weekends while business transient, skilled workers and group-conference/meetings account for 42.5% of mid-week occupancy.
- Increasing supply in the market is absorbed in peak demand periods while occupancy drops, primarily, in the harder to sell nights, Sunday, Monday and Thursday.

ADR vs. RevPAR 2012 - 2017				
	ADR	% of Chg	RevPAR	% of Chg
2012	\$102.24	~	\$59.97	~
2013	\$106.49	4.2%	\$64.78	8.0%
2014	\$105.62	-0.8%	\$67.80	4.7%
2015	\$111.36	5.4%	\$75.86	11.9%
2016	\$114.81	3.1%	\$79.26	4.5%
2017	\$111.80	-2.6%	\$72.68	-8.3%

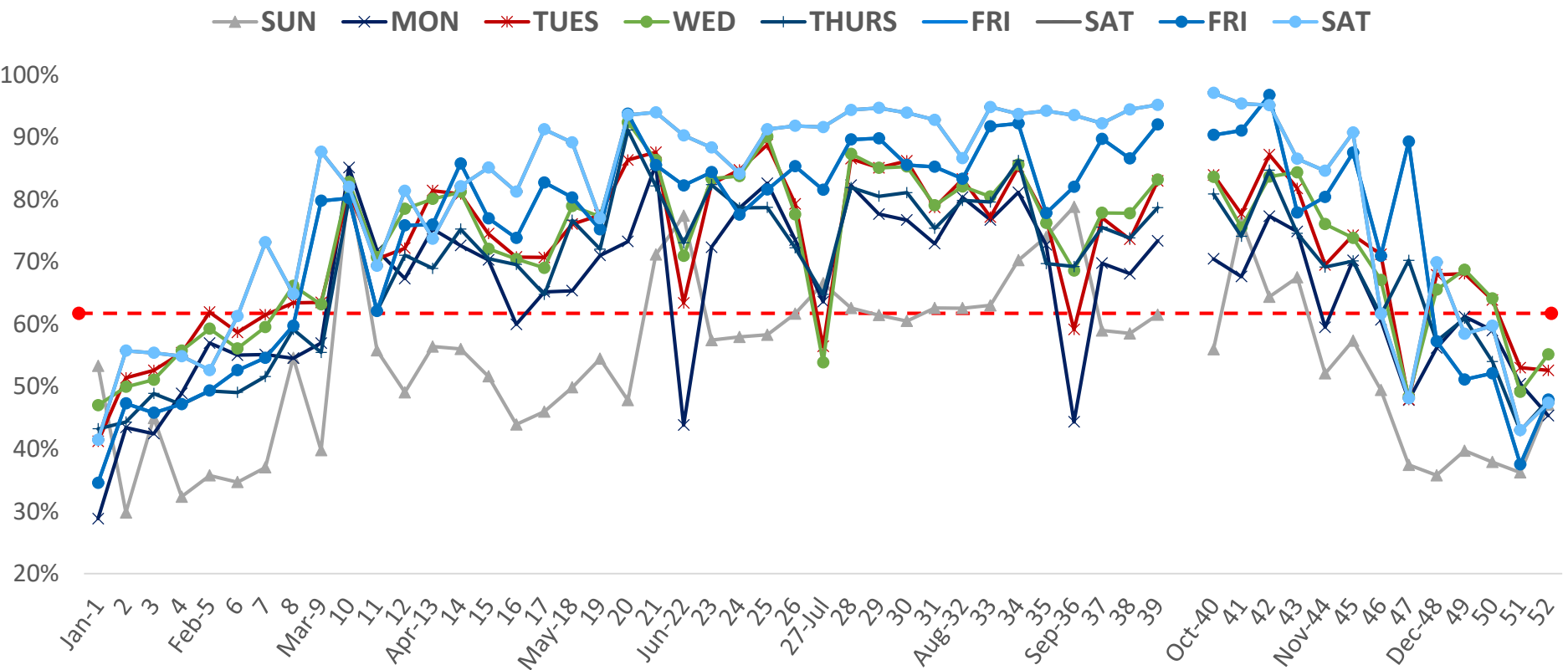
Observations:

- Hoteliers consistently increased ADR (Average Daily Rates) over the 6-year period 2012 – 2017, with the exception of a very slight decrease of -0.8% in 2014 and -2.6% in 2017.
- Strong demand in the Dutchess County lodging market helped to support hoteliers raising ADR and in turn keeping RevPAR on a positive trend.
- In 2017 we see room demand reported slightly down by -0.6%, thus hoteliers responded by slightly lowering ADR in order to remain competitive and encourage overnight stays in Dutchess County rather than a neighboring county.

ADR VS REVPAR TREND



52-Week Occupancy Trend January - September, 2018 & October - December, 2017



Daily Occupancy %'s	# of days	% of YR
Days reported at 60% - 69%	53	14.6%
Days reported at 70% - 79%	90	24.7%
Days reported at 80% - 89%	82	22.5%
Days reported at 90% - 100%	35	9.6%

Total # of days 60% or higher occupancy
260 nights = 71.2% of the year

Dutchess County Market Segmentation – YSI Hotel Survey

The YSI survey of Dutchess County hoteliers revealed the market segments that are driving overnight visitation within the destination. Corporate and group business are tracked closely by rate codes, while leisure segment data is often collected by the management team at the individual properties. Rank order is shown in table below. **A total of twenty properties participated in the YSI survey, thus providing an overall response rate of 58.9%.**

ALL 58.9% / 1,739	South/Fishkill 57.6% / 872	Central/ Poughkeepsie 59.0% / 740	North/East/ Other 61.1% / 127	Market Segment % Reporting / # of Rooms
36.9%	49.7%	36.3%	8.3%	Individual – Business
23.3%	25.4%	22.9%	7.5%	Individual business travellers (white collar)
13.6%	15.3%	13.4%	0.8%	Skilled workers
34.3%	30.3%	38.0%	44.6%	Group/Meetings/Conference
18.1%	11.9%	25.6%	21.2%	Weddings
7.0%	9.0%	4.8%	4.3%	SMERF
5.6%	6.3%	3.8%	12.4%	Conference/Meeting
3.6%	3.1%	3.8%	6.7%	Group tour/Motorcoach
25.7%	23.1%	25.7%	47.1%	Leisure
18.1%	18.1%	14.8%	39.3%	Tourists visiting the area (attractions, visiting friends & family, outdoor recreation, passing-thru, etc.)
7.6%	5.0%	10.9%	7.8%	University related (graduations, events, etc.)
3.1%	5.9%	0.0%	0.0%	Other

Source: YSI survey of Dutchess County lodging properties

Observations:

- This data confirms Dutchess County, New York is a both a leisure and business destination with half (50.8%) of the room nights sold being driven by the combined leisure segments: leisure transient, wedding market. university-related and SMERF while the combined business segments account for 42.5% of room nights sold comprised of: corporate transient, skilled workers and group-conference/meeting travel. The balance of group related travel (10.6%) and “other” (3.1%) accounted for the remaining room demand.
- STR data supported these findings with Friday and Saturday night occupancy running highest occupancy, while Tuesday, Wednesday, and Thursday nights running in the high 60’s to low 70’s the majority of the year.



Visitor Profile

Leisure Overnight n=862

Leisure Daytrip n=1,852

Bus/Conf/Mtg n=149

CIA n=1,299

Purpose

Dutchess Tourism retained Young Strategies Inc. to conduct research to develop a visitor profile and strategic plan for tourism growth in Dutchess County, NY.

Methodology

An online survey instrument was prepared by the Young Strategies research team and approved by Dutchess Tourism. Recipients were invited to take a visitor survey and be entered into a chance to win one of two \$250 VISA gift cards. Local residents were also asked to take the survey and tell about the overnight guests that they host in their Dutchess County homes.

The survey was deployed through web-links, email invitations and Facebook invitations provided to 14 Dutchess County industry partners including: **CIA-2,340; Dutchess Consumer Newsletter-1,055**; DCRCOB Balloon Fest-659; Valley Table-543; Millbrook Vineyards and Winery-396; Locust Grove-82; DCRCOB KidVenture-81; Dia:Beacon-69; Fishkill Farms-37; Dutchess County Fairgrounds-25; Dutchess Tourism-18; Hudson Valley Renegades-13; Mid Hudson Children's Museum-8; and Enjoy Rhinebeck-1.

A total of 5,327 surveys were received. Of these,

- **2,671 were visitors of Dutchess County, NY in the last 3 years**
- **1,168 were year-round residents of Dutchess County**
- **785 were residents of a neighboring county (Columbia, Greene, Ulster, Orange, Putnam or Connecticut)**
- **401 had not visited Dutchess County area in the last 3 years**
- **89 were a part-time resident of Dutchess County**

Overall Survey Respondent Demographics

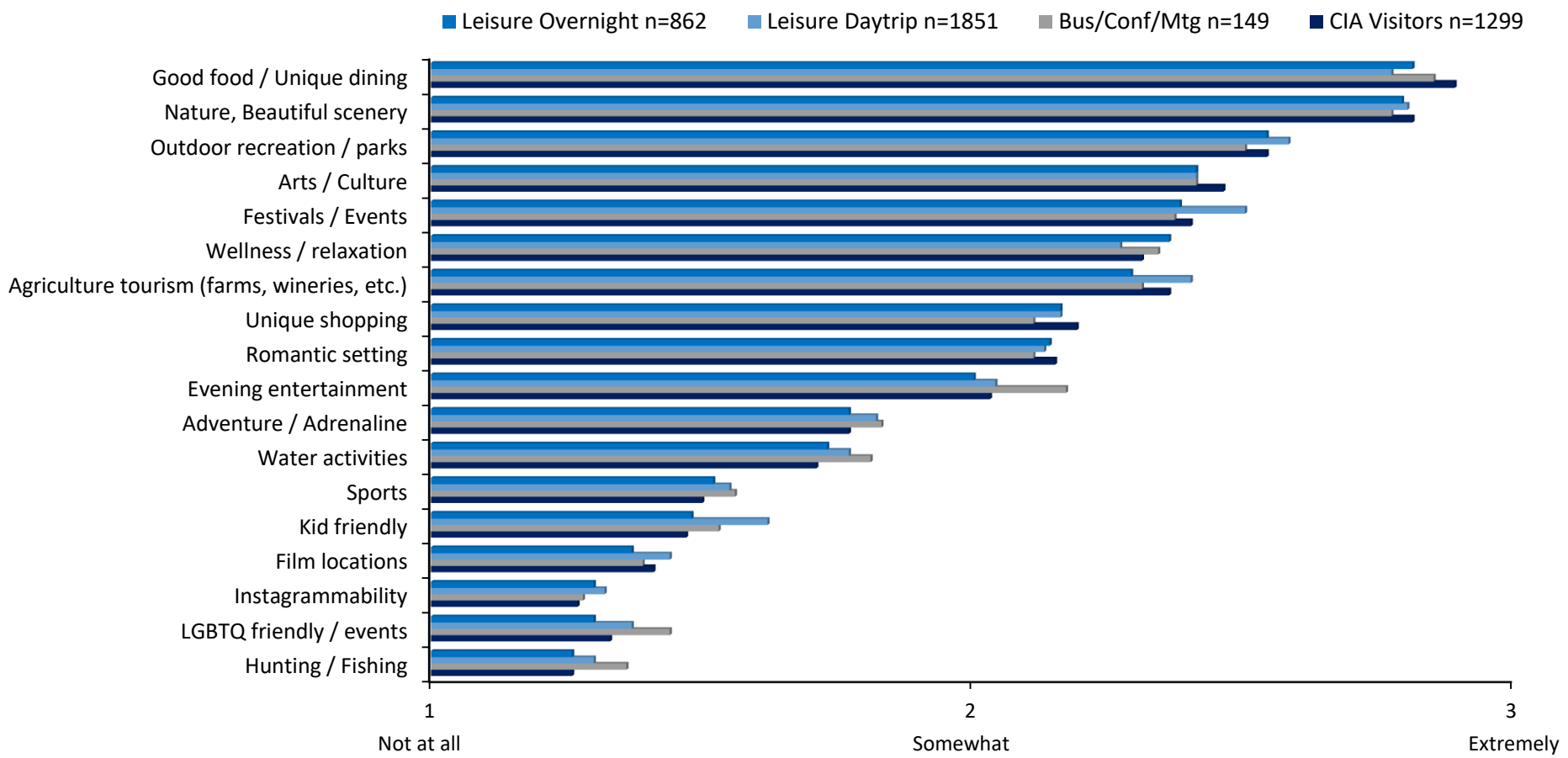
Respondent Demographics	Overnight n=777	Daytrip n=1,696	Bus/Conf/Mtg n=123	CIA n=1,198
Generational Group	Teens - 0.1% Fifties – 30.4% Twenties – 2.8% Sixties – 30.8% Thirties – 7.1% Seventies – 10.3% Forties – 16.6% Eighties – 1.8%	Teens - 0.1% Fifties – 26.2% Twenties – 4.1% Sixties – 29.0% Thirties – 10.5% Seventies – 13.5% Forties – 15.5% Eighties - 1.0%	Teens - 0.0% Fifties – 37.7% Twenties – 4.1% Sixties – 28.7% Thirties – 6.6% Seventies – 8.2% Forties – 14.8% Eighties - 0.0%	Teens - 0.1% Fifties – 30.4% Twenties – 2.4% Sixties – 29.9% Thirties – 5.6% Seventies – 15.5% Forties – 14.5% Eighties – 2.5%
Gender				
Female	65.9%	69.2%	59.4%	66.0%
Male	33.6%	30.2%	39.8%	33.3%
Other	0.4%	0.5%	0.8%	0.5%
Transgender	0.1%	0.5%	0.0%	0.2%
Occupation				
	Retired – 14.1%	Retired – 16.8%	Hospitality / tourism – 9.8%	Retired – 17.0%
	Education-professor/teacher – 12.7%	Education-professor/teacher – 14.1%	Education-professor/teacher – 8.9%	Education-professor/teacher – 13.0%
	Healthcare industry – 10.2%	Healthcare industry – 10.0%	Healthcare industry – 8.9%	Healthcare industry – 9.0%
	Executive / manager – 8.5%	Administrative/Office support – 9.0%	Professional / technical – 8.0%	Professional / technical – 7.3%
	Professional / technical – 7.6%	Professional / technical – 6.8%	Executive / manager – 6.8%	Administrative / Office support – 7.1%
Ethnicity				
White / Caucasian	83.9%	80.4%	82.9%	83.6%
Prefer not to answer	7.5%	10.0%	8.9%	8.3%
Hispanic or Latino	4.3%	4.0%	2.4%	3.2%
Asian or Pacific Islander	3.8%	4.4%	2.4%	4.0%
Black or African American	1.9%	2.0%	3.3%	1.6%
American Indian or Alaskan Native	0.7%	1.3%	1.6%	1.1%

Destination Selection Attributes

Please tell us the level of importance for each of the following attributes when selecting a getaway / vacation destination?

Observations:

- The majority of respondents across all segments report good food/unique dining followed by nature, beautiful scenery as the most important attributes when selecting a getaway / vacation destination. This data is positive news for Dutchess County as they are a first-class culinary and scenic destination.



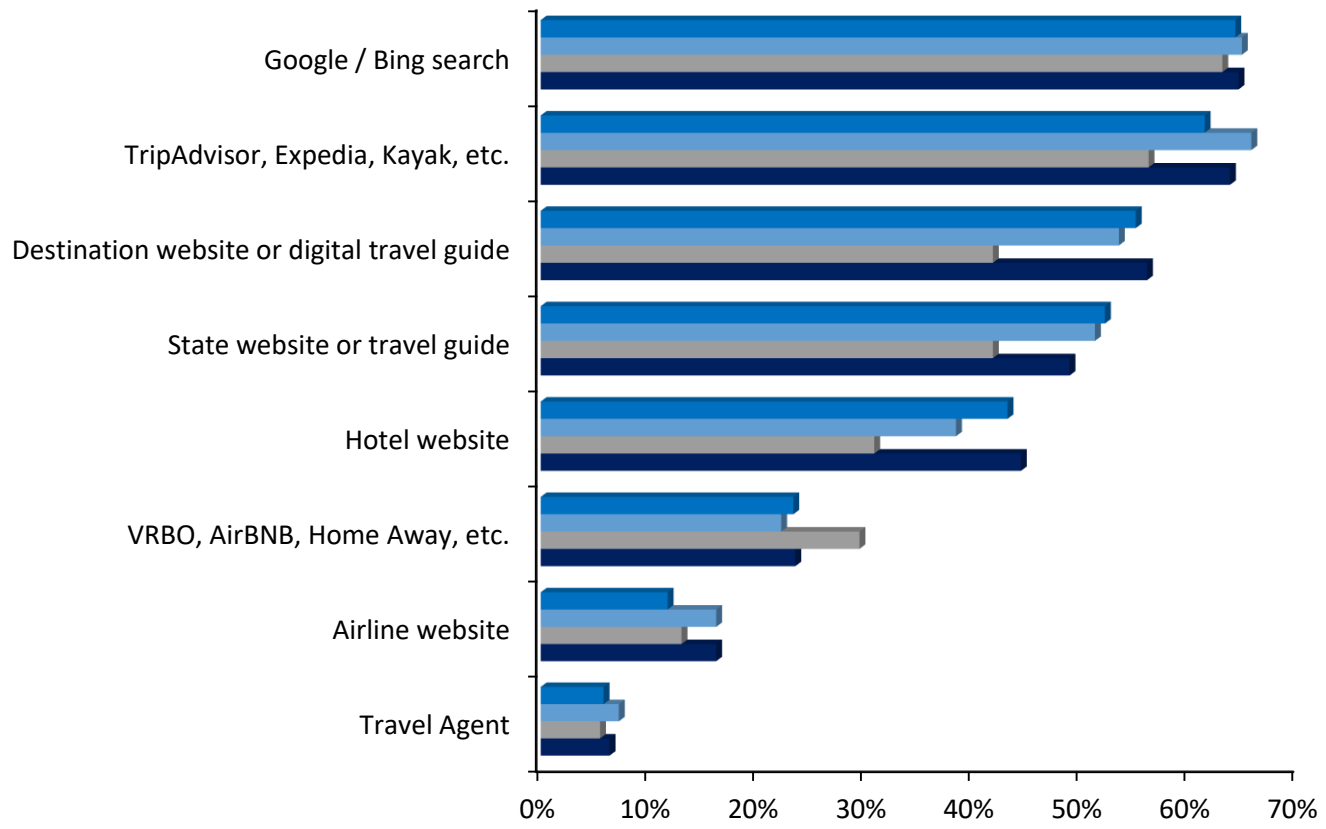
Travel Planning Sources

What are your preferred sources for vacation / getaway planning?

Observations:

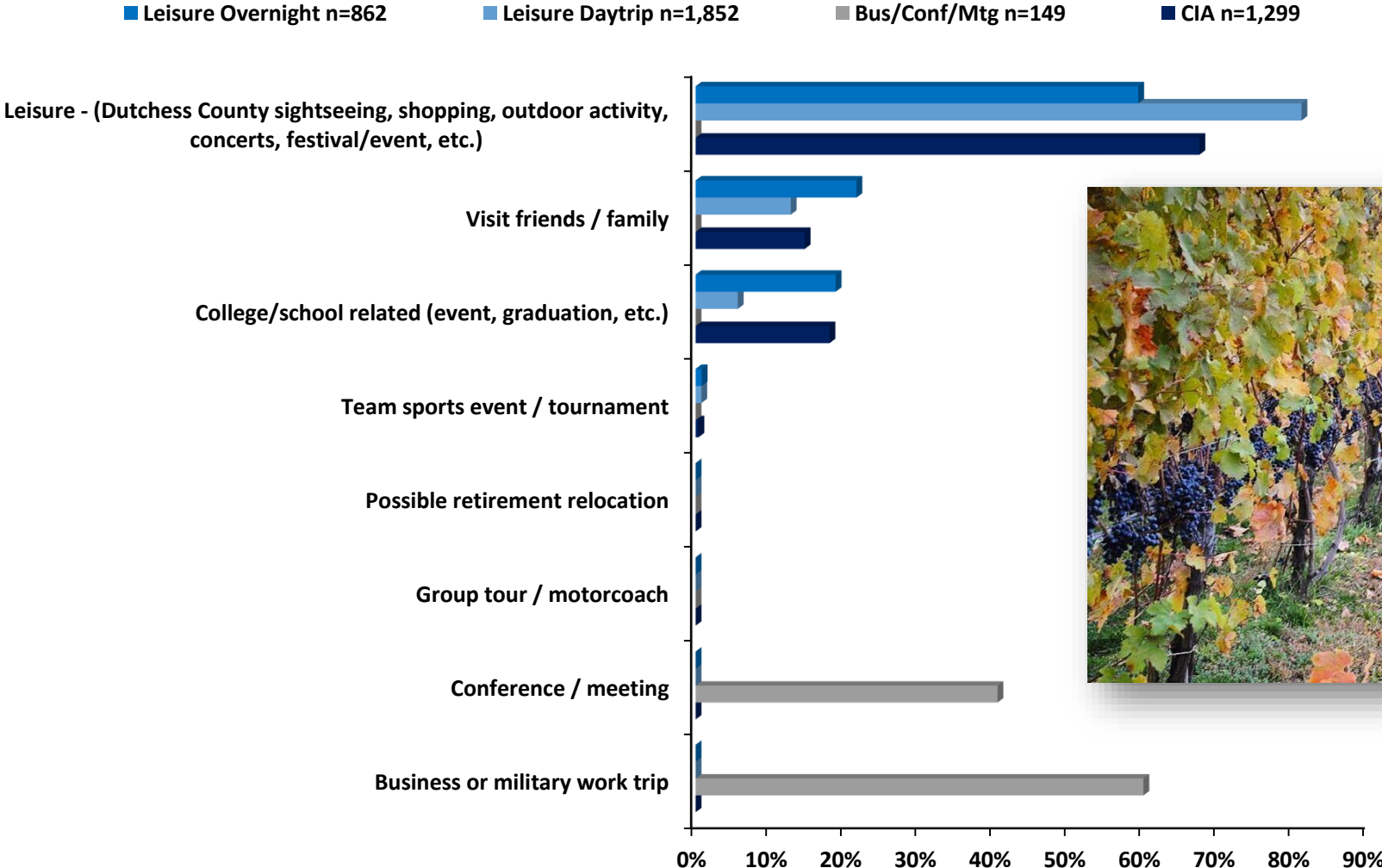
- All segments reported Google / Bing search followed by TripAdvisor, Expedia, Kayak, etc. as preferred sources for vacation / getaway planning. This is typical in most destination research conducted by YSI. The Dutchess Tourism website and digital travel guide is also reported in the top three primary sources for vacation planning, once again confirming the Dutchess Tourism website is a valuable asset for travelers to Dutchess County.

■ Leisure Overnight n=844 ■ Leisure Daytrip n=1814 ■ Bus/Conf/Mtg n=146 ■ CIA Visitor n=1271



Main Trip Purpose

What was the MAIN purpose for your most recent trip to Dutchess County?

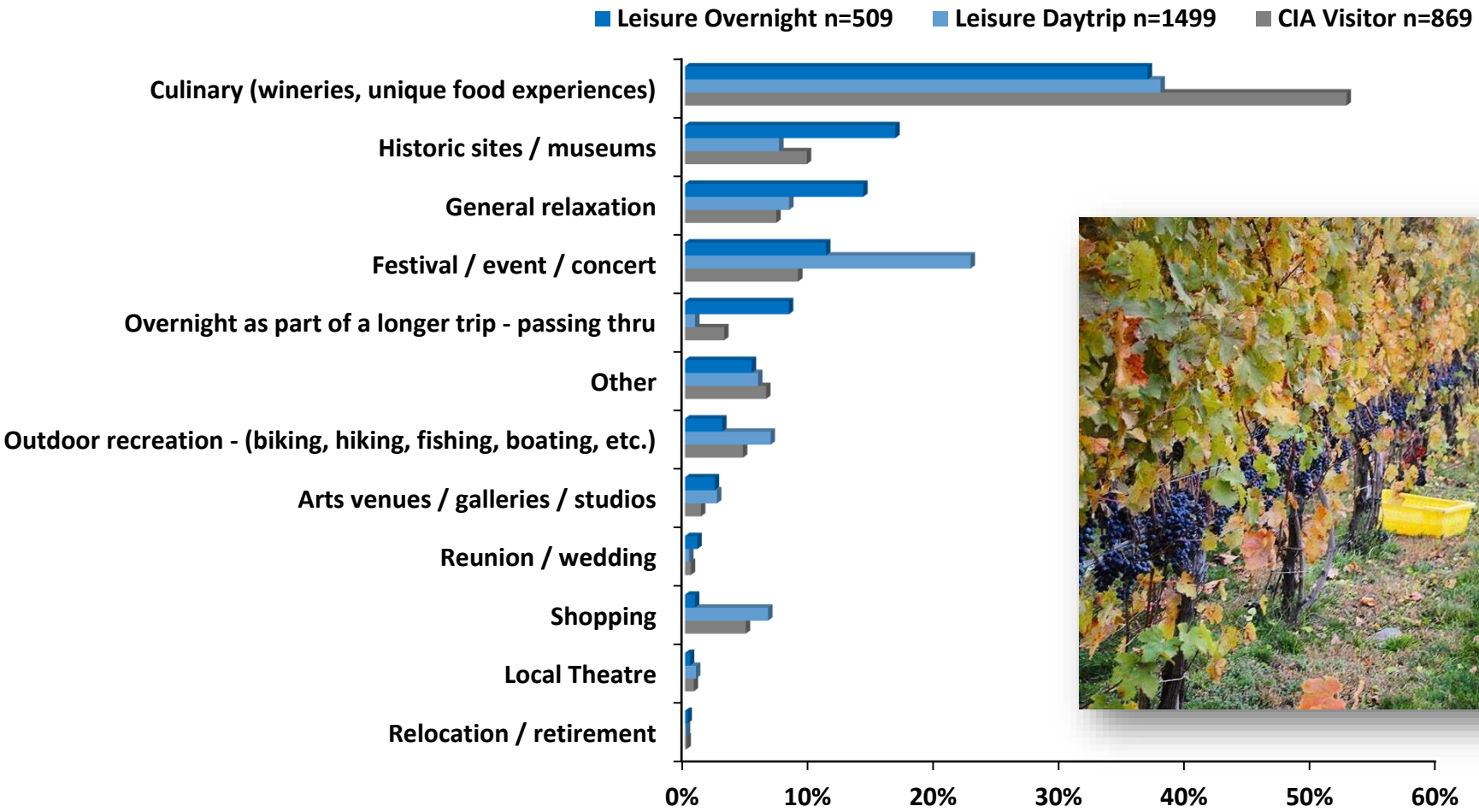


Leisure Travel Purpose

How would you best categorize the PRIMARY purpose for your most recent LEISURE trip to Dutchess County?

Observations:

- Of those that responded they came to Dutchess County for a leisure trip purpose, the majority of overnight (37%) and CIA Visitors (53%) reported traveling for a culinary experience as their primary leisure trip purpose followed by historic sites and museums.
- Leisure daytrip respondents reported primary trip purposes including experiencing Dutchess County culinary followed by a festival/event/concert.

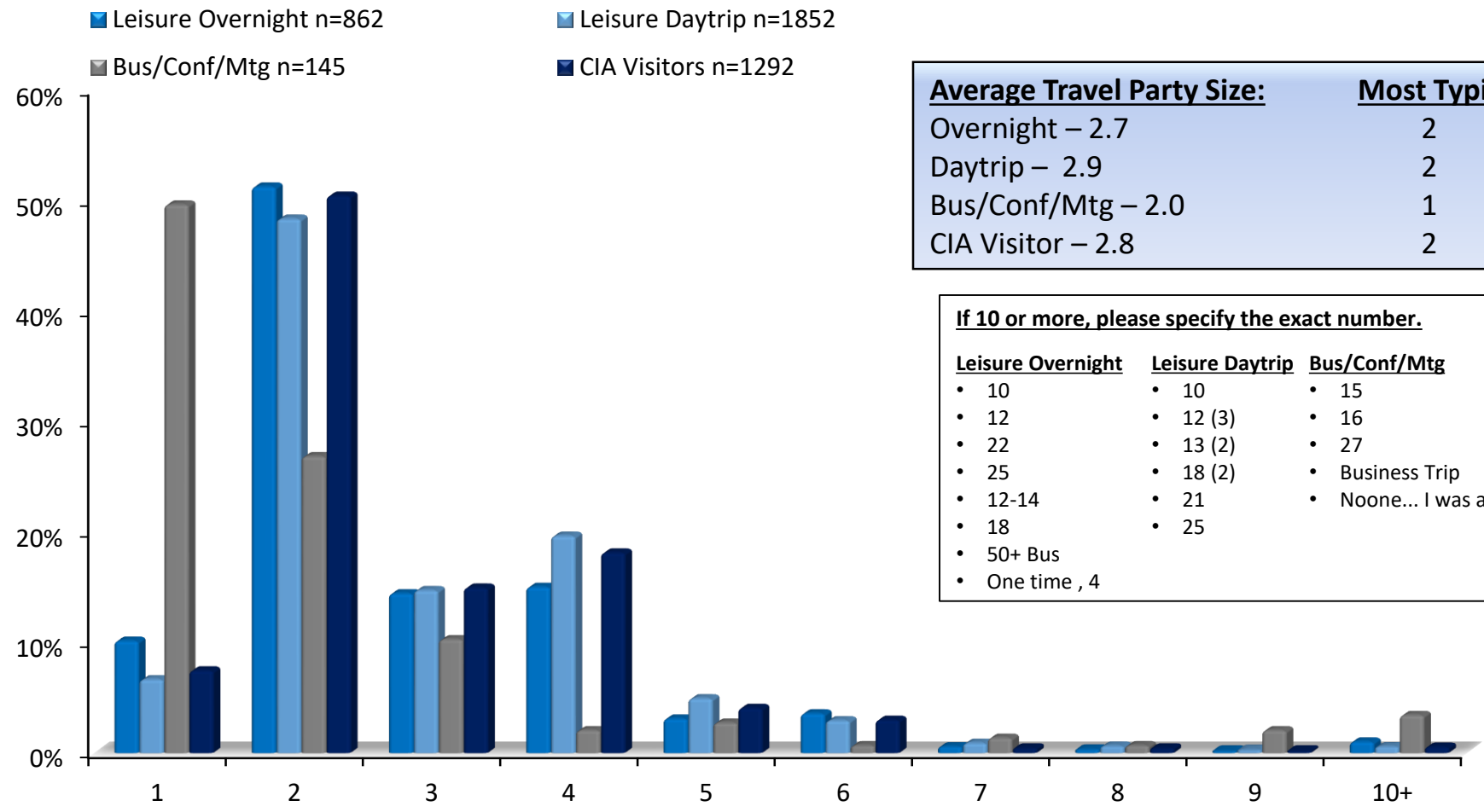


Travel Party Size

What was the total number of people in your immediate travel party who were included in your travel expenses?

Observations:

- The average travel party size for overnight visitors=2.7, daytrippers =2.9, Bus/Conf/Mtg=2.0 and CIA Visitors=2.8, with the most typical response being a party size of 2 in all segments with the exception of business/conference/meeting.



<u>Average Travel Party Size:</u>	<u>Most Typical:</u>
Overnight – 2.7	2
Daytrip – 2.9	2
Bus/Conf/Mtg – 2.0	1
CIA Visitor – 2.8	2

If 10 or more, please specify the exact number.

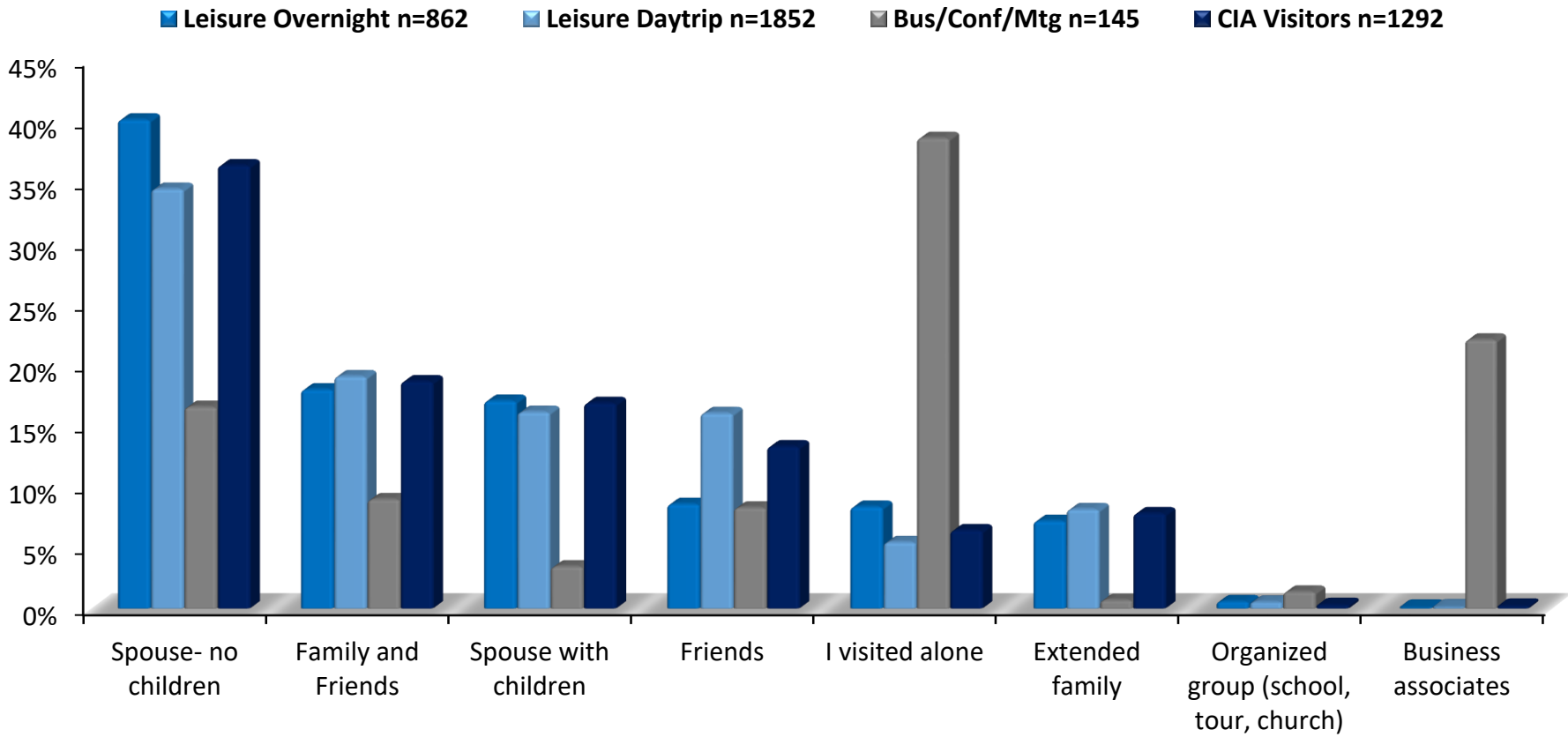
<u>Leisure Overnight</u>	<u>Leisure Daytrip</u>	<u>Bus/Conf/Mtg</u>	<u>CIA</u>
• 10	• 10	• 15	• 12 (2)
• 12	• 12 (3)	• 16	• 18 (3)
• 22	• 13 (2)	• 27	• 50
• 25	• 18 (2)	• Business Trip	
• 12-14	• 21	• Noone... I was alone	
• 18	• 25		
• 50+ Bus			
• One time , 4			

Travel Party Makeup

Which of the following best describes the people who came with you on this visit to Dutchess County, NY?

Observations:

- 40% of overnight visitors, 35% of daytrip visitors, and 36% of CIA visitors most often reported traveling with their spouse (no children).
- As expected, visiting alone was predominately reported by the business/conference/meeting respondents, followed by business associates.



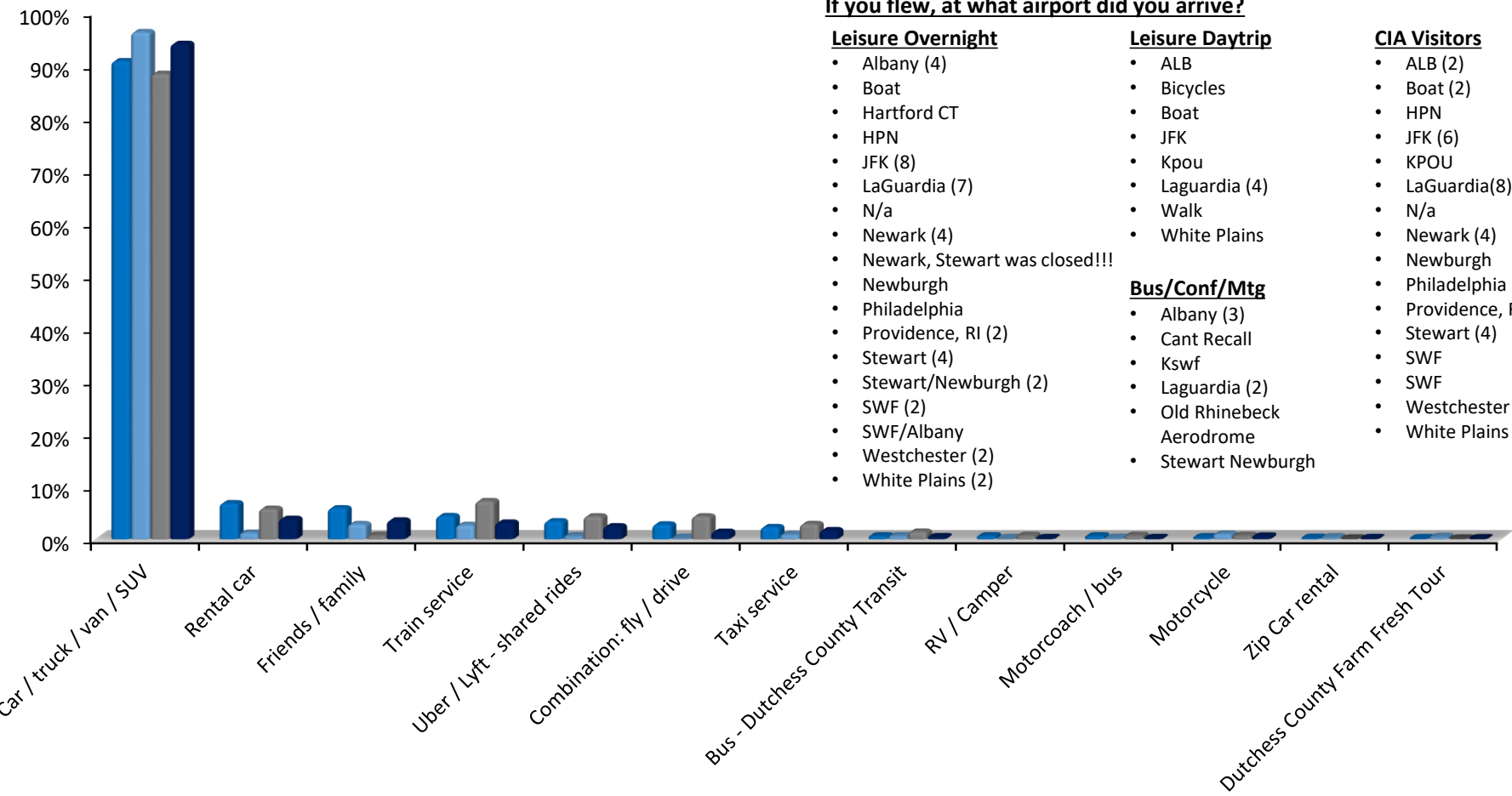
Primary Mode of Transportation

What mode of transportation did you use to get to and around Dutchess County, NY?

Observations:

- The majority of all visitors reported traveling to Dutchess County by automobile confirming Dutchess County is a drive destination.

■ Leisure Overnight n=817
 ■ Leisure Daytrip n=1804
 ■ Bus/Conf/Mtg n=138
 ■ CIA Visitors n=1257



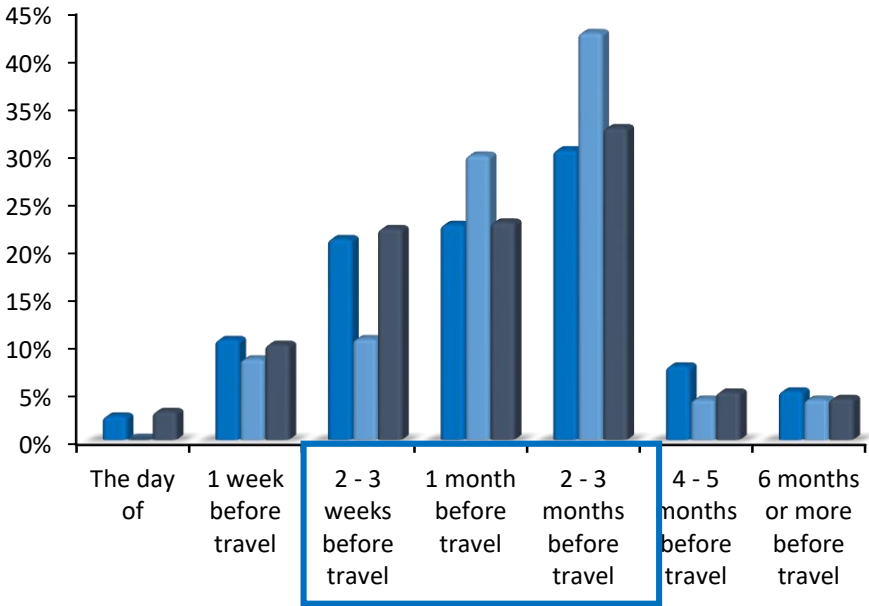
If you flew, at what airport did you arrive?

- | Leisure Overnight | Leisure Daytrip | CIA Visitors |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> Albany (4) Boat Hartford CT HPN JFK (8) LaGuardia (7) N/a Newark (4) Newark, Stewart was closed!!! Newburgh Philadelphia Providence, RI (2) Stewart (4) Stewart/Newburgh (2) SWF (2) SWF/Albany Westchester (2) White Plains (2) | <ul style="list-style-type: none"> ALB Bicycles Boat JFK Kpou LaGuardia (4) Walk White Plains <p style="text-decoration: underline;">Bus/Conf/Mtg</p> <ul style="list-style-type: none"> Albany (3) Cant Recall Kswf LaGuardia (2) Old Rhinebeck Aerodrome Stewart Newburgh | <ul style="list-style-type: none"> ALB (2) Boat (2) HPN JFK (6) KPOU LaGuardia(8) N/a Newark (4) Newburgh Philadelphia Providence, RI (2) Stewart (4) SWF SWF Westchester White Plains (3) |

Overnight - Travel Planning Characteristics

How far in advance did you book your accommodations for your most recent trip to Dutchess County, NY?

■ Leisure Overnight n=682 ■ Bus/Conf/Mtg n=42 ■ CIA Visitors n=438



Observations:

- 44% of overnight, 46% of Bus/Conf/Mtg, and 45% of CIA respondents indicate they are booking their accommodations within a month of travel which is a typical trend in many markets across the count. This data indicates Dutchess Tourism needs to respond swiftly to visitor information inquiries since potential visitors are highly likely to book quickly.
- 30% of overnight, 43% of Bus/Conf/Mtg, and 33% of CIA Visitor respondents report booking their accommodations within 2-3 months of travel.

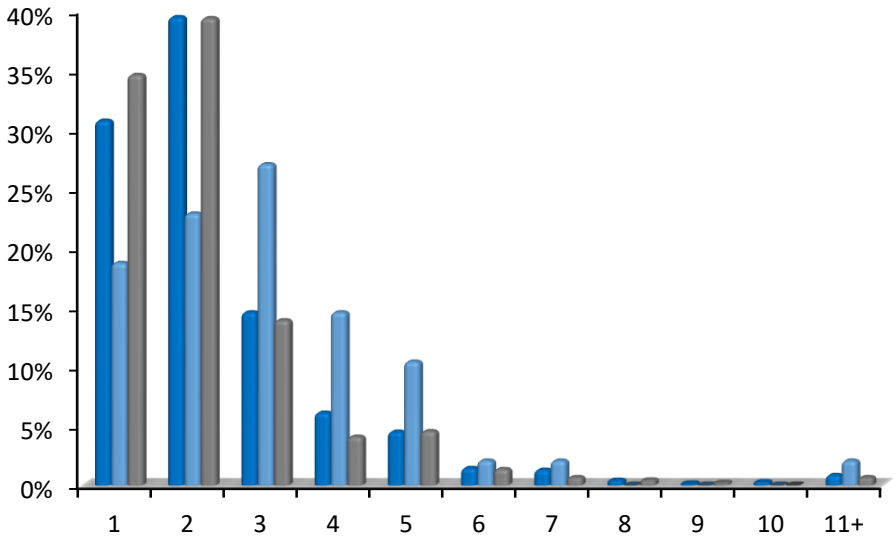
How many nights did you stay in Dutchess County, NY on your most recent visit?

Observations:

- Travelers to Dutchess County are typically staying 2-3 nights.
- It is healthy to have at least two night stays reported indicating enough activities to keep travelers occupied and interested in the destination.

	<u>Average # of Nights</u>	<u>Most Typical</u>
Leisure Overnight	2.3 nights	2 nights
Bus/Conf/Mtg	2.9 nights	3 nights
CIA	2.1 nights	2 nights

■ Leisure Overnight n=686 ■ Bus/Conf/Mtg n=48 ■ CIA n=439

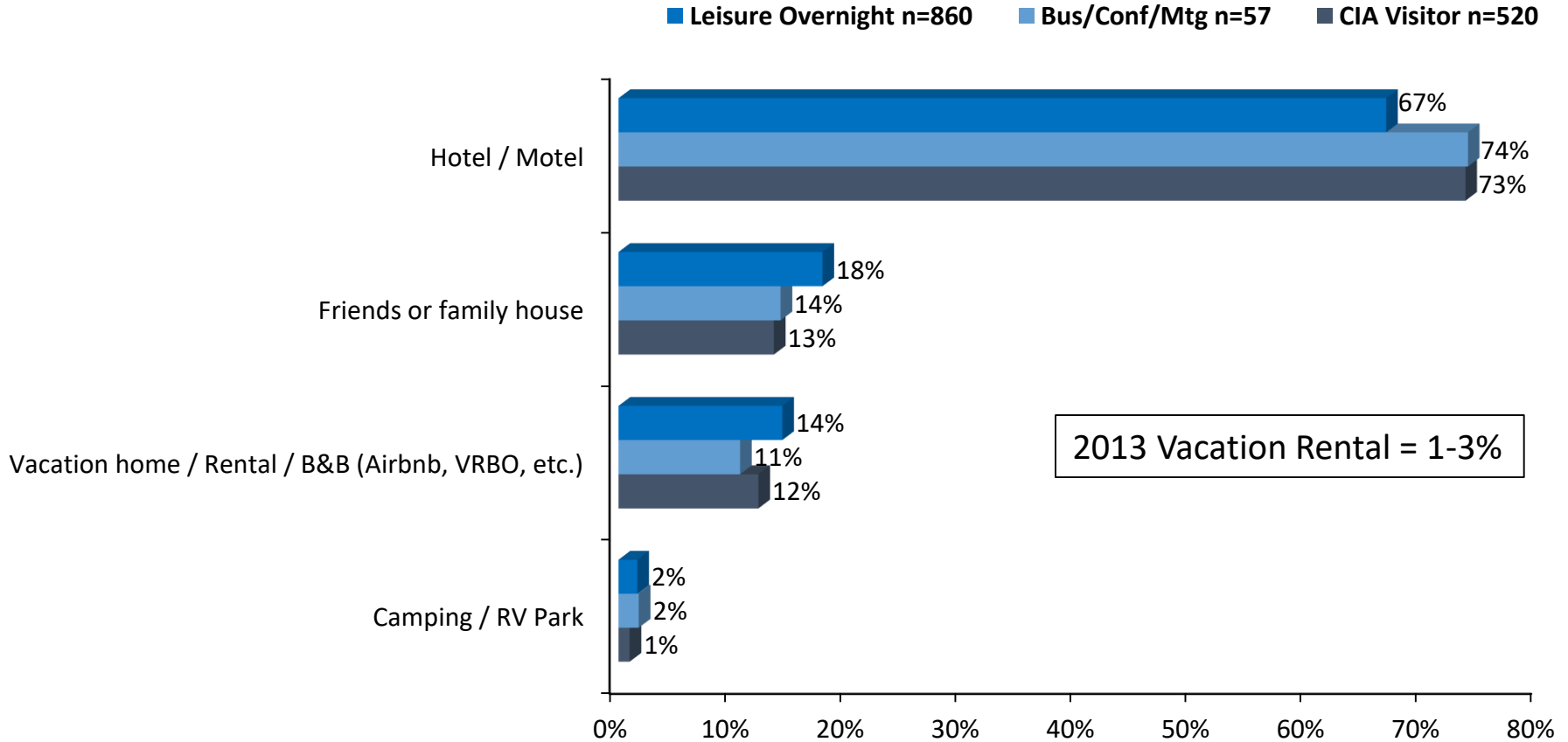


Travel Planning Characteristics

Where did you stay during your last visit to Dutchess County, NY?

Observations:

- 67% of overnight, 74% of Bus/Conf/Mtg and 74% of CIA visitors reported staying in a hotel/motel which is typical.
- It is typical for as much as 1/3 of overnight visitors to a community to stay in the homes of friends and family and in Dutchess County we see this number being reported at 45% across all three travel segments. Additionally, we see approximately 37% of overnight visitors staying in vacation rentals, which is reflective of a growing trend among travelers in many markets across the nation.



Primary Destination

Which community was the PRIMARY destination of your most recent visit to Dutchess County?

	Leisure Overnight n=807	Leisure Daytrip n=1,787	Bus/Conf/Mtg n=136	CIA Visitors n=1,249
Hyde Park	44.9%	24.1%	28.7%	52.9%
Poughkeepsie	16.2%	14.3%	27.2%	14.2%
Rhinebeck	13.8%	21.4%	15.4%	13.2%
Other	4.7%	3.5%	3.7%	3.2%
Millbrook	4.2%	9.1%	5.2%	1.4%
Fishkill	3.7%	5.4%	5.2%	2.6%
Beacon	2.5%	8.7%	4.4%	3.4%
Hopewell Junction	2.4%	1.5%	0.7%	1.0%
Wappingers Falls	1.4%	3.0%	1.5%	1.8%
Pleasant Valley	1.0%	0.5%	0.0%	0.4%
Pawling	0.7%	1.3%	1.5%	0.8%
Red Hook	0.7%	1.4%	0.0%	1.0%
Staatsburg	0.7%	0.5%	0.0%	0.6%
Amenia	0.6%	0.7%	0.7%	0.6%
Clinton Corners	0.4%	0.3%	0.7%	0.2%
Dover Plains	0.4%	0.4%	0.7%	0.2%
LaGrangeville	0.4%	0.8%	1.5%	0.3%
Stanfordville	0.4%	0.1%	0.0%	0.1%
Millerton	0.3%	1.5%	0.0%	0.9%
Poughquag	0.3%	0.4%	0.0%	0.2%
Tivoli	0.3%	0.5%	0.7%	0.3%
Pine Plains	0.1%	0.1%	0.0%	0.0%
Rhinecliff	0.1%	0.7%	1.5%	0.3%
Wingdale	0.0%	0.1%	0.7%	0.1%

Observations:
The vast majority of all segment respondents (75% overnight, 60% daytrip, 71% Bus/Conf/Mtg and 80% CIA Visitors) reported Hyde Park, Poughkeepsie and Rhinebeck as the top three primary destination communities.



Communities Visited

If this was your first visit to Dutchess County, please tell us what other communities you visited. If you have been to Dutchess County more than once, please tell us which communities you most frequently visit.

	Leisure Overnight n=641	Leisure Daytrip n=1,328	Bus/Mtg/Conf n=98	CIA Visitors n=1,249
Poughkeepsie	69.3%	59.7%	71.4%	14.2%
Hyde Park	63.0%	53.0%	50.0%	52.9%
Rhinebeck	51.8%	58.4%	57.1%	13.2%
Fishkill	26.7%	39.0%	37.8%	2.6%
Wappingers Falls	24.0%	33.4%	30.6%	1.8%
Beacon	19.2%	38.3%	34.7%	3.4%
Millbrook	17.8%	22.3%	21.4%	1.4%
Red Hook	15.1%	16.8%	18.4%	1.0%
Rhinecliff	9.7%	10.0%	9.2%	0.3%
Hopewell Junction	8.0%	18.8%	17.4%	1.0%
Staatsburg	6.7%	4.4%	3.1%	0.6%
Pleasant Valley	6.1%	5.8%	6.1%	0.4%
Millerton	5.6%	8.7%	5.1%	0.9%
Pawling	5.6%	13.9%	12.2%	0.8%
Amenia	5.0%	6.7%	4.1%	0.6%
Other	4.7%	2.3%	2.0%	3.2%
LaGrangeville	4.5%	8.8%	13.3%	0.3%
Tivoli	4.4%	5.7%	4.1%	0.3%
Clinton Corners	4.2%	4.1%	4.1%	0.2%
Pine Plains	2.2%	4.0%	2.0%	0.0%
Poughquag	1.7%	3.8%	1.0%	0.2%
Dover Plains	1.6%	5.1%	7.1%	0.2%
Wingdale	1.4%	3.2%	1.0%	0.1%
Stanfordville	1.3%	1.5%	2.0%	0.1%



Visitor Activities While in Dutchess County, NY
Check all activities you or a member of your travel party participated in as part of your visit to Dutchess County.

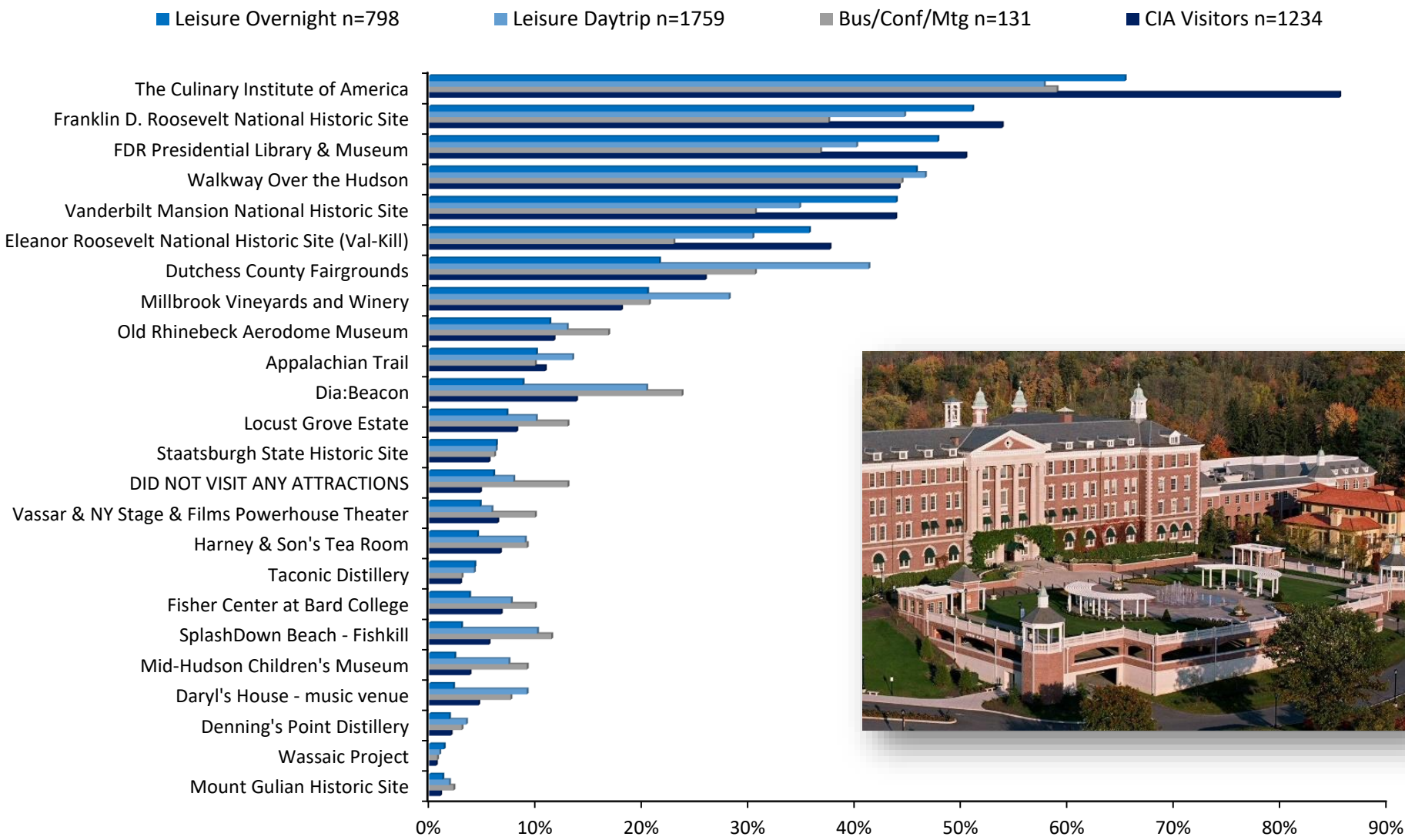
	Leisure Overnight n=798	Leisure Daytrip n=1,759	Bus/Conf/Mtg n=131	CIA Visitors n=1,234
Fine or local culinary dining	63.2%	56.4%	51.2%	73.3%
Driving / sightseeing	51.1%	41.2%	33.6%	46.9%
Historic site / museum	49.5%	33.3%	26.7%	42.9%
Shopping	41.0%	37.9%	35.9%	39.8%
Farmers markets / U-picks	31.8%	33.0%	24.4%	31.4%
Festival / event	31.5%	46.7%	31.3%	31.7%
Walking downtown	31.0%	24.6%	18.3%	25.5%
Antique shopping	30.5%	27.1%	22.9%	28.9%
State / National Park	30.2%	22.3%	12.2%	25.2%
Wineries	27.4%	28.0%	23.7%	21.8%
Distillery / Brewery	25.1%	25.0%	27.5%	23.7%
Art Venues / Galleries / Studios	22.2%	22.6%	19.1%	21.5%
Hiking	20.1%	20.8%	17.6%	17.6%
Visit other friends & relatives	17.5%	16.4%	13.0%	14.3%
Sleep late / take a nap	10.9%	1.6%	1.5%	4.8%
Other	10.0%	7.5%	6.1%	10.0%
Bike Trails	9.3%	10.5%	9.2%	9.2%
School / College reunion	9.0%	3.8%	5.3%	8.8%
Family reunion	7.9%	4.2%	3.1%	5.4%
Graduation	7.5%	2.6%	3.8%	6.7%
Theatre	6.4%	9.0%	5.3%	8.0%
Business / meeting / conference / training	3.6%	3.5%	53.4%	4.4%
Sports event / tournament	3.0%	5.2%	6.9%	3.2%
Camping	2.8%	1.9%	3.1%	1.8%
Wedding	2.8%	2.2%	2.3%	2.1%
Kayaking	2.5%	3.4%	0.8%	2.2%
DID NOTHING	2.0%	0.5%	6.1%	0.9%

Observations:

- All visitor segments to Dutchess County reported immersing themselves in the local experience by enjoying fine or local culinary dining, driving/sightseeing, historic site/museum, shopping, farmers markets/U-picks, and festivals/events. Many of these activities should be at the core of future marketing messages.
- It is important to mention that while shopping is the third or fourth most popular activity reported by visitors across all segments, it does not necessarily translate to high spending on shopping. Many people shop for something to do, without making a purchase.

Attractions Visited While in Dutchess County

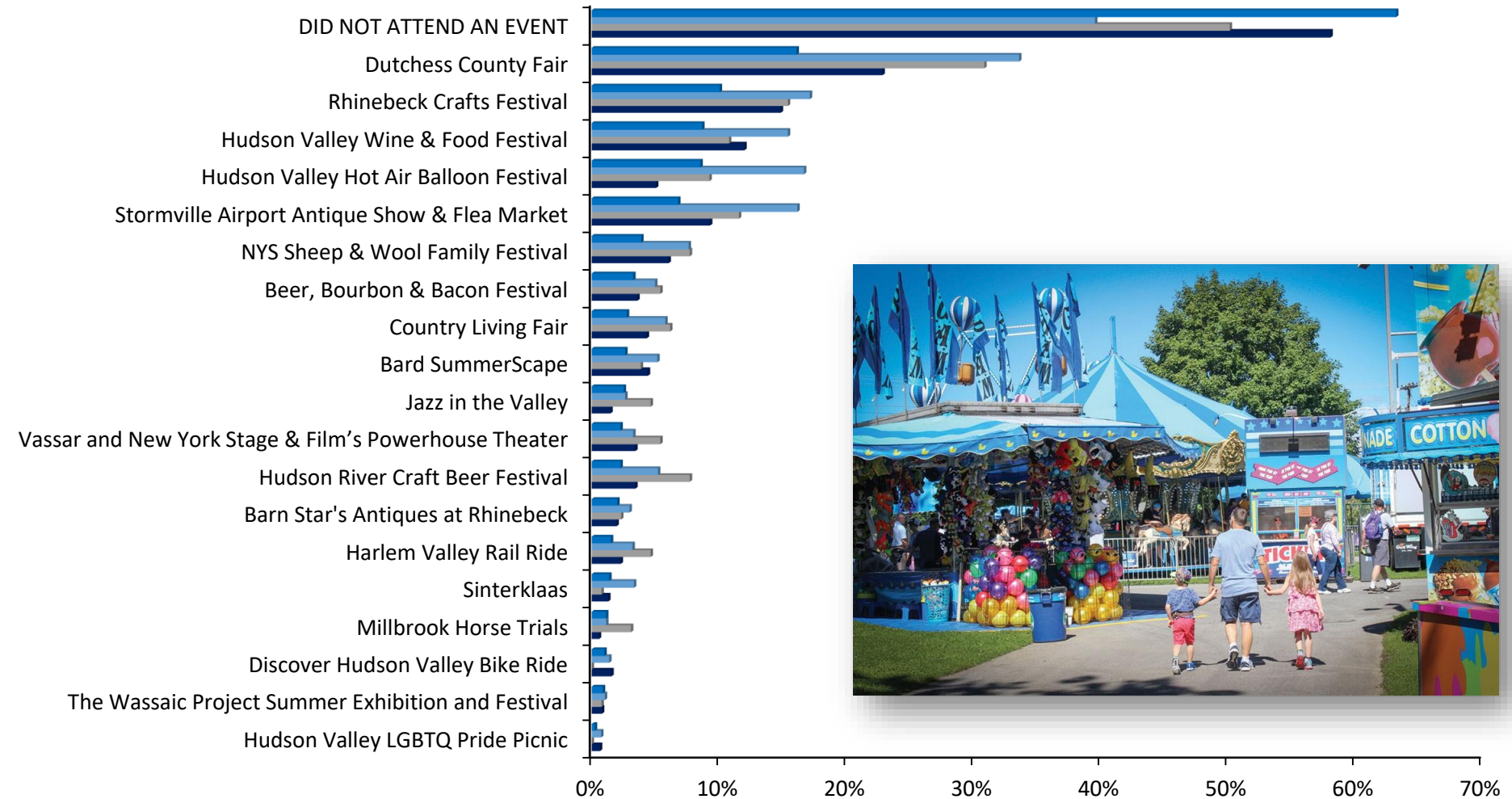
Please check ALL attractions that you visited while in Dutchess County.



Festivals/Events Visited While in Dutchess County

Following is a list of major events in or near Dutchess County. If you attended an event(s), please check ALL that apply.

■ Leisure Overnight n=797 ■ Leisure Daytrip n=1749 ■ Bus/Conf/Mtg n=130 ■ CIA Visitors n=1228

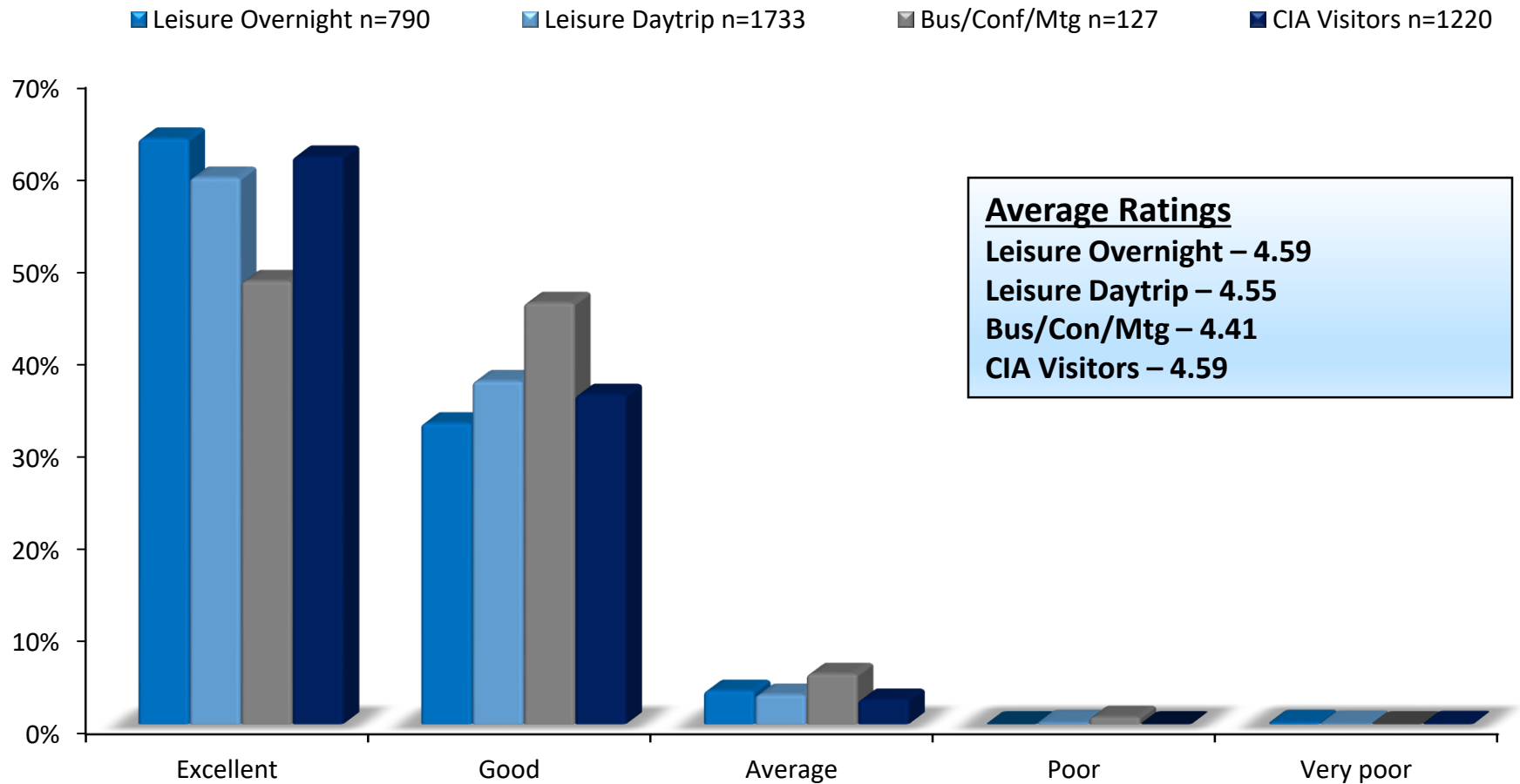


Visitor Satisfaction

Overall, how would you rate your experience visiting Dutchess County using the satisfaction scale provided below?

Observations:

- Overall trip satisfaction for visitors to Dutchess County is high; Overnight (4.59), Daytrip (4.55), Bus/Conf/Mtg (4.41) and CIA Visitors (4.59), on a 5.0 scale indicating the destination is delivering good experiences to those who visit Dutchess County.



Following is a list of amenities offered in Dutchess County. Considering this visit, please rate each amenity using the satisfaction scale provided.

- Observations:**
- The amenities with the highest satisfaction rating across all segments was range of dining choices, overall appeal of attractions and quality of customer service.
 - The research team typically sees ratings for these categories above 4.0. Typically categories that reported below 4.0 provide an opportunity for the community leaders to work together to determine areas where improvements can be implemented.

■ Leisure Overnight n=780 ■ Leisure Daytrip n=1647
■ Bus/Conf/Mtg n=119 ■ CIA Visitors n=1191

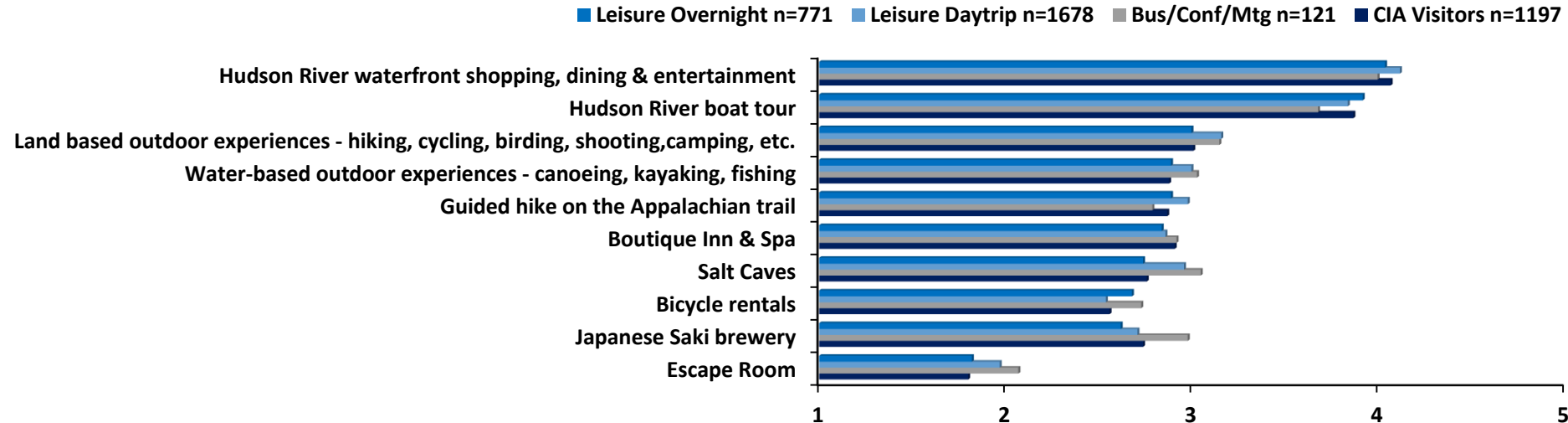


Rating Averages	Leisure Overnight n=780	Leisure Daytrip n=1,647	Bus/Conf /Mtg n=119	CIA Visitors n=1,191
Range of dining choices	4.43	4.42	4.27	4.55
Overall appeal of attractions in Dutchess County	4.36	4.39	4.23	4.38
Quality of customer service	4.23	4.26	4.05	4.27
Lodging value you received for the price paid	4.11	3.95	3.95	4.02
Signage and wayfinding	4.08	4.07	3.93	4.05
Ease of finding visitor information	4.04	4.01	3.81	4.01
Parking	4.02	4.00	3.79	4.02
Variety of shopping & merchandise	3.99	4.12	3.85	4.06
Evening activities / entertainment	3.75	3.90	3.72	3.77
Traffic	3.71	3.68	3.44	3.66
Variety of children's activities	3.62	3.80	3.46	3.60

Appealing Activities/Experiences
Please tell us if any of the following activities/experiences would appeal if offered in Dutchess County.

Observations:

- Hudson River waterfront shopping, dining & entertainment followed by Hudson River boat tour was ranked most appealing by all segments as the most desirable for future product or experience development in Dutchess County.



	Leisure Overnight n=771	Leisure Daytrip n=1678	Bus/Conf/Mtg n=121	CIA Visitors n=1197
Hudson River waterfront shopping, dining & entertainment	4.04	4.12	4.00	4.07
Hudson River boat tour	3.92	3.84	3.68	3.87
Land based outdoor experiences - hiking, cycling, birding, shooting, snowshoeing, camping, etc.	3.00	3.16	3.15	3.01
Water-based outdoor experiences - canoeing, kayaking, fishing	2.89	3.00	3.03	2.88
Guided hike on the Appalachian trail	2.89	2.98	2.79	2.87
Boutique Inn & Spa	2.84	2.86	2.92	2.91
Salt Caves	2.74	2.96	3.05	2.76
Bicycle rentals	2.68	2.54	2.73	2.56
Japanese Saki brewery	2.62	2.71	2.98	2.74
Escape Room	1.82	1.97	2.07	1.80

Eastern Dutchess Outdoor Recreation
How familiar are you with the following Eastern Dutchess outdoor recreational experiences?

Leisure Overnight n=775	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	83.9%	6.2%	7.5%	2.5%
Dover Stone Church	78.1%	5.7%	13.4%	2.9%
Harlem Valley Rail Trail	62.3%	9.1%	20.6%	8.0%
Appalachian Trail	6.8%	23.9%	48.0%	21.3%

Leisure Daytrip n=1,684	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	78.9%	6.5%	10.5%	4.2%
Dover Stone Church	73.7%	5.7%	15.7%	4.9%
Harlem Valley Rail Trail	48.5%	10.8%	28.2%	12.6%
Appalachian Trail	6.1%	20.4%	45.2%	28.3%

Bus/Conf/Mtg n=125	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	78.3%	5.8%	10.8%	5.0%
Dover Stone Church	72.4%	11.4%	13.8%	2.4%
Harlem Valley Rail Trail	44.7%	13.0%	26.0%	16.3%
Appalachian Trail	5.7%	20.3%	52.0%	22.0%

CIA n=1,199	Never heard of it	Heard of it but not interested in visiting	Heard of it and want to visit in the future	I have been there
Great Swamp	84.0%	5.5%	7.5%	3.1%
Dover Stone Church	79.5%	4.6%	12.6%	3.3%
Harlem Valley Rail Trail	58.5%	9.1%	22.2%	10.3%
Appalachian Trail	6.1%	23.1%	46.0%	24.9%

Travel PARTY Spending (Total Trip)

Observations:

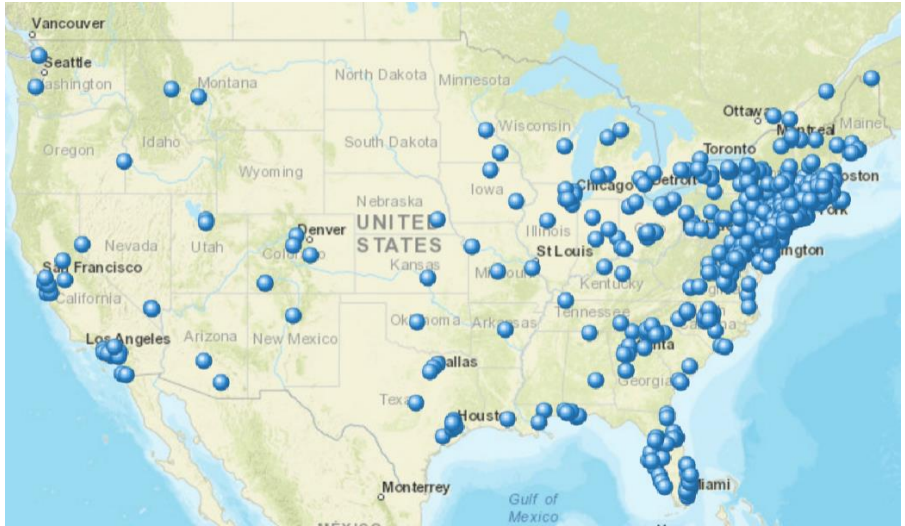
- Dutchess County makes almost 3 times as much money per party on overnight visitors compared to daytrip visitors therefore, the primary focus of marketing efforts for Dutchess County should be their overnight segment.
- Promotion of the destination to overnight visitors will result in a healthy number of day trippers as a natural by-product.

2018 Spending Category	Leisure Overnight	Leisure Daytrip	Bus/Conf/Mtg	CIA
	<i>n=862</i>	<i>n=1,852</i>	<i>n=149</i>	<i>n=1,298</i>
Average total # in Travel Party	2.7	2.9	2.0	2.8
Average Length of Stay	2.3 nights	0 nights	1.9 nights	2.1 nights
Lodging (% of reporting)	\$367.52 (70.6%)	\$0.00 (0.0%)	\$480.74 (28.9%)	\$350.34 (30.6%)
Dining / Food (% of reporting)	\$268.80 (83.4%)	\$119.30 (83.2%)	\$249.51 (63.8%)	\$205.09 (87.4%)
Shopping (% of reporting)	\$199.13 (56.4%)	\$111.38 (43.4%)	\$117.02 (31.5%)	\$158.36 (51.1%)
Attractions and Events (% of reporting)	\$188.98 (47.7%)	\$76.48 (43.5%)	\$84.00 (22.1%)	\$154.49 (38.7%)
Local Transportation (% of reporting)	\$68.33 (36.0%)	\$39.38 (16.8%)	\$63.00 (31.5%)	\$56.45 (24.1%)
Agriculture (% of reporting)	\$125.12 (33.3%)	\$96.98 (29.6%)	\$113.85 (18.1%)	\$92.09 (26.9%)
Average Total Spending Per Travel Party (% of reporting)	\$858.57* (89.4%)	\$295.45* (88.2%)	\$559.56* (69.8%)	\$516.17* (90.8%)

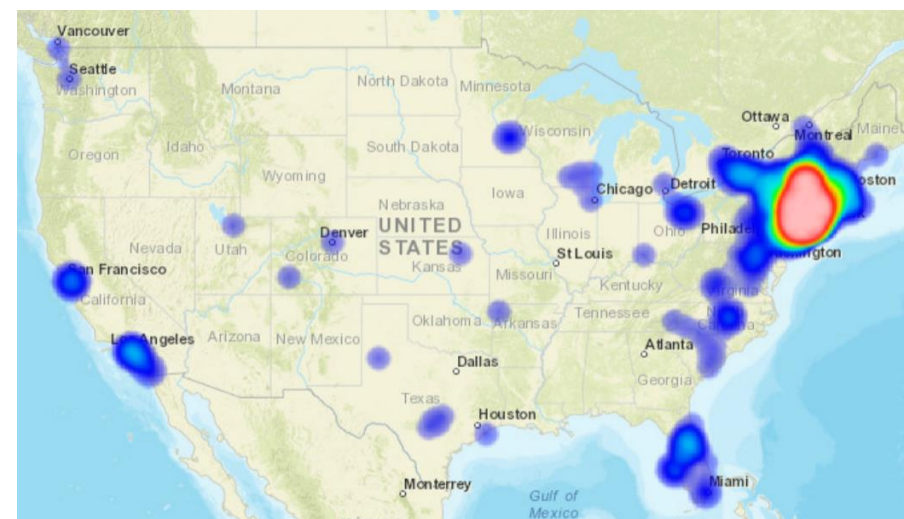
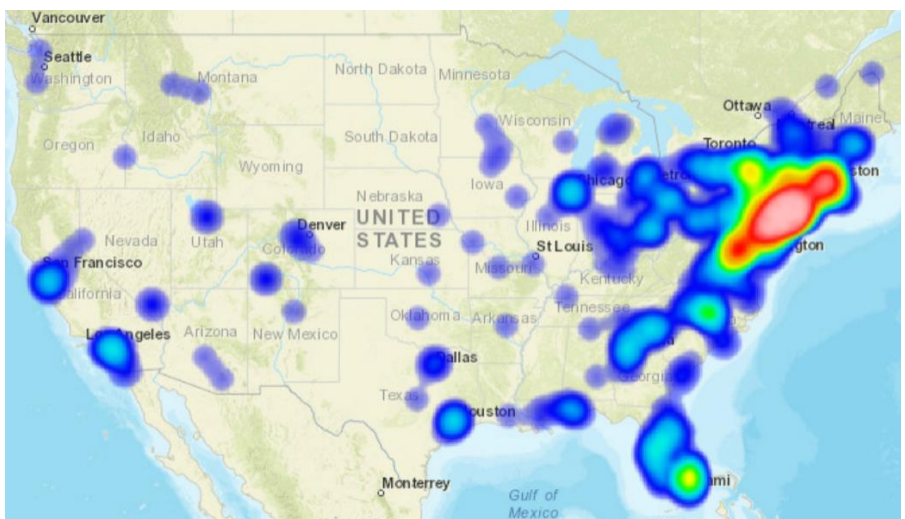
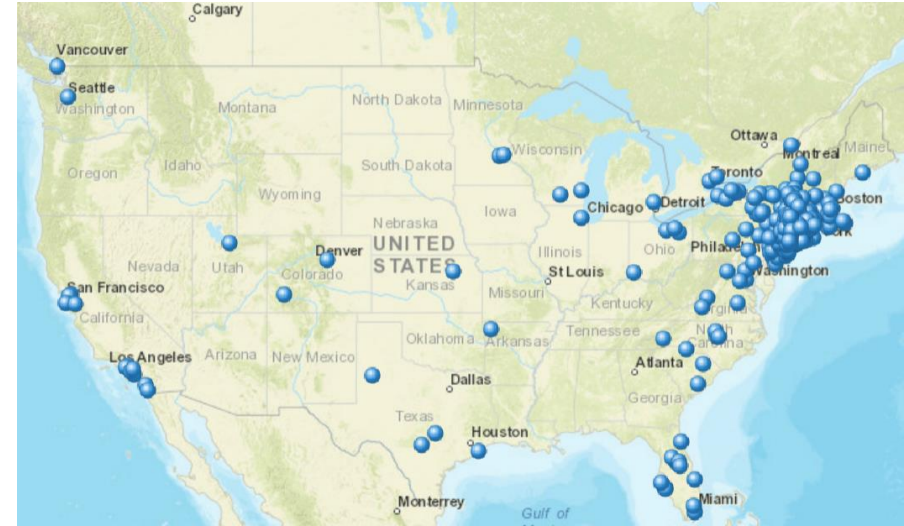
*Note: The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Point of Origin

Visitors Point of Origin – OVERNIGHT

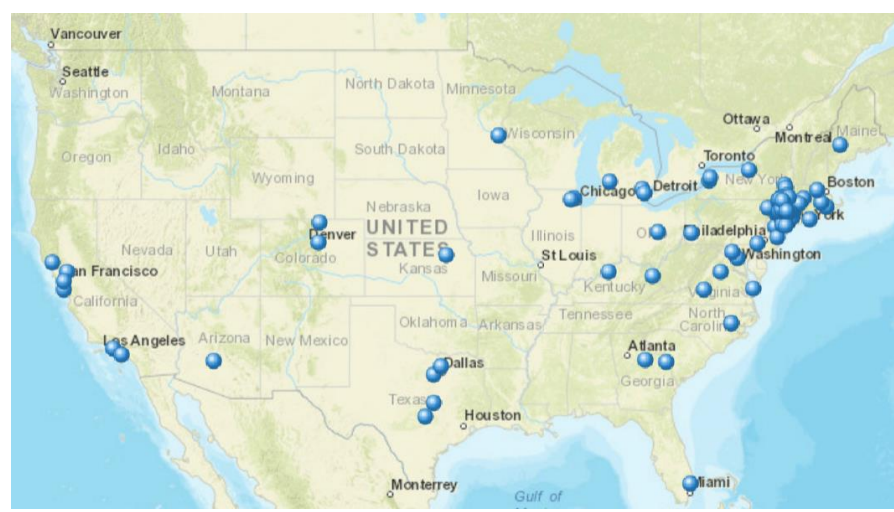


Visitors Point of Origin – DAYTRIP

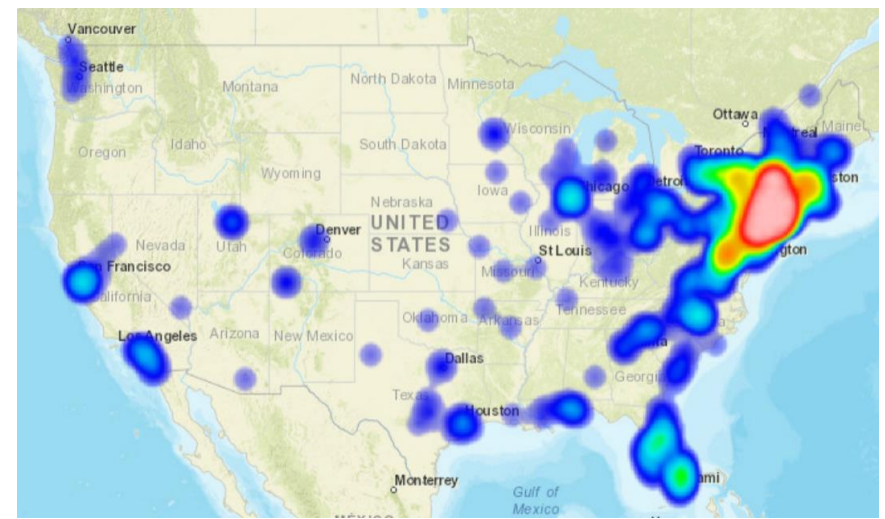
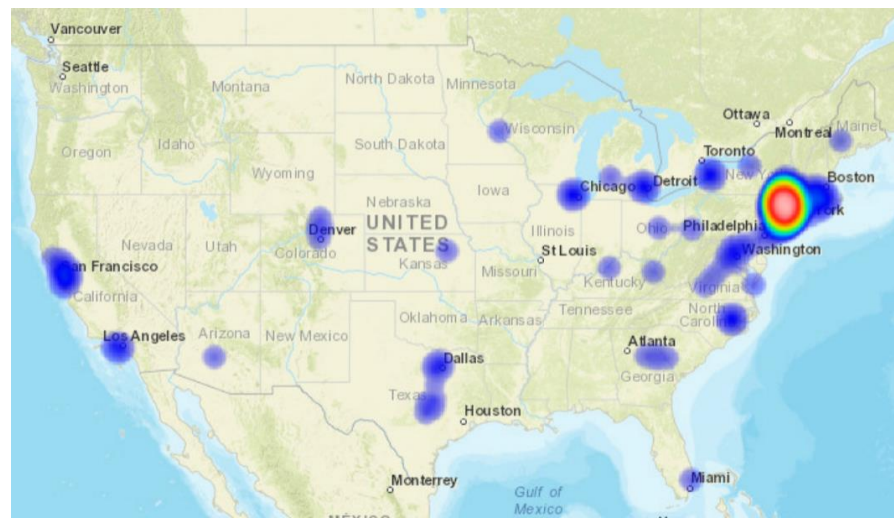
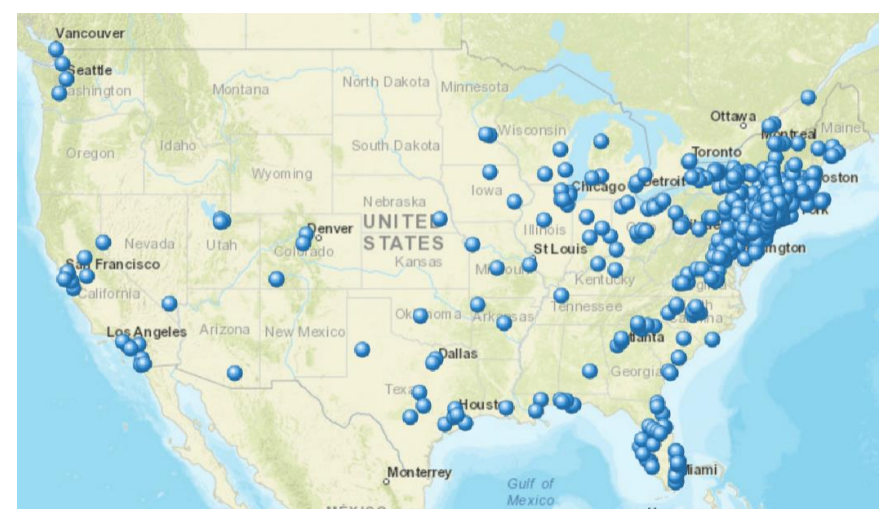


Point of Origin

Visitors Point of Origin – BUS/CONF/MTG



Visitors Point of Origin – CIA



Dutchess County

Part-time Resident Survey Respondents



Summary & Observations:

- **89 respondents identified as Dutchess County part-time residents** in the survey.
- **80% of part-time residents reported living in Dutchess County part of the year for 1 to 15 years.** Reported staying in Dutchess County **weekends all year round** but **typically staying between June through October.**
- **The top three activities** part-time residents reported participating in were **fine or local culinary dining (78%), farmers markets/U-picks (78%), driving/sightseeing (66%)** while the **top attractions** were **The Culinary Institute of America (71%), Walkway Over the Hudson (62%), and Dutchess County Fairgrounds (57%).** Part-time residents reported visiting many attractions and participating in a variety of Dutchess County activities.
- **Overall trip satisfaction for Dutchess County part-time residents is high; 4.66 on a 5.0 scale.** Amenities with the highest satisfaction rating were reported as **overall appeal of attractions in Dutchess County, range of dining choices, quality of customer service and signage and wayfinding.**
- **Appalachian Trail and Harlem Valley Rail Trail** were reported as the **most recognized** Eastern Dutchess outdoor recreational experiences by part-time residents while **Great Swamp** was reported as the **least recognized** Eastern Dutchess outdoor recreational experience.
- **Hudson River waterfront shopping, dining & entertainment** as well as **Hudson River boat tour** were ranked **highest** as having the **most appeal** if offered in Dutchess County.

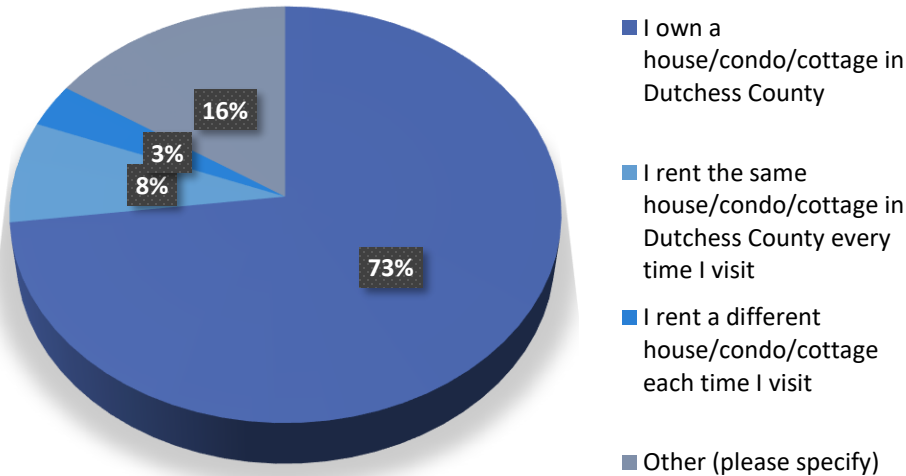


Which of the following best describes your seasonal lodging/residence in Dutchess County?

n=89

Observations:

- 73% of part-time residents reported owning a house/condo/cottage in Dutchess County.

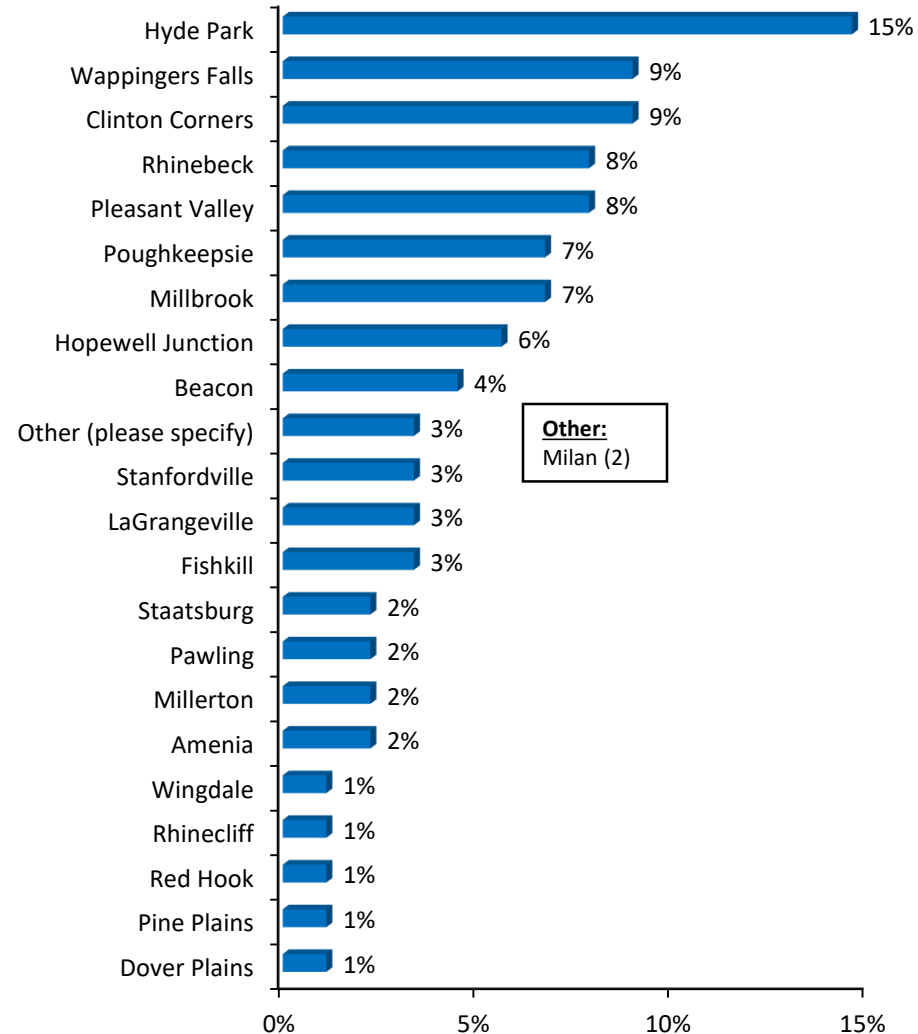


Other:

- College
- College dorm
- Dorm
- Dorm
- I am a seasonal at a local campground.
- I stay with my family in Dutchess county
- My family owns a home in Dutchess county
- My parents live in beacon and I go home often
- School
- School dorm
- Student at the CIA
- Used to live here. If visit, hotel
- We own an RV and have it in interlake campground
- Went to school in the area

In what Dutchess County community do you own property or typically rent?

n=89



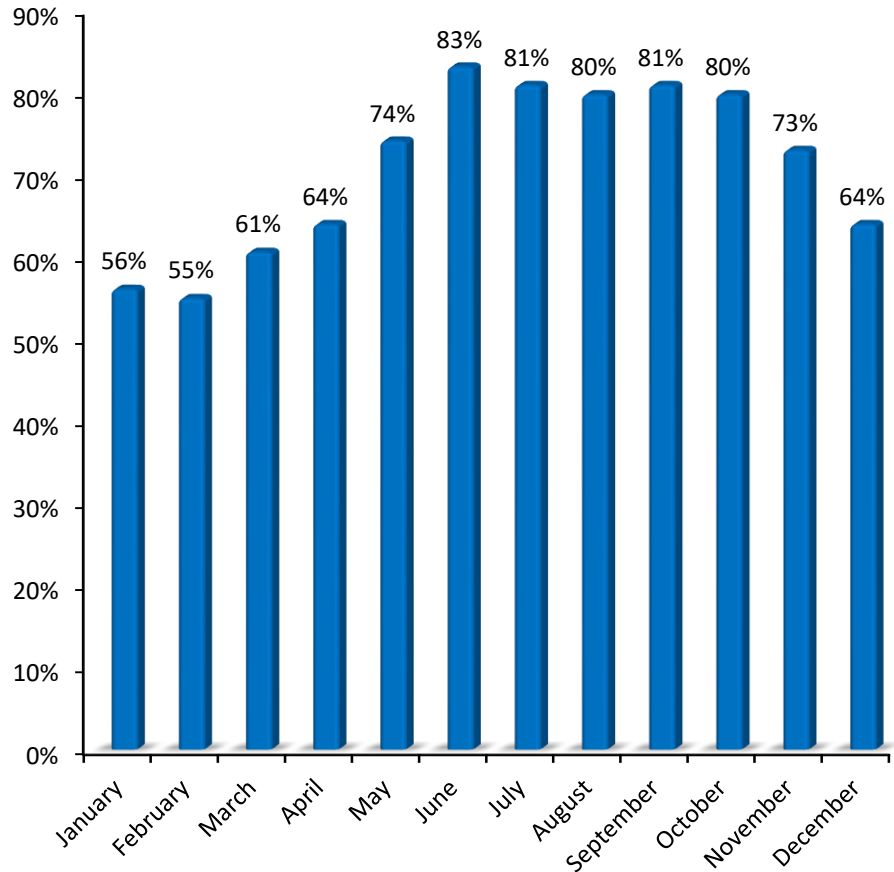
Other:
Milan (2)

Which months of the year do you typically stay in Dutchess County?

n=89

Observations:

- Part-time residents reported staying in Dutchess County typically between June and October.

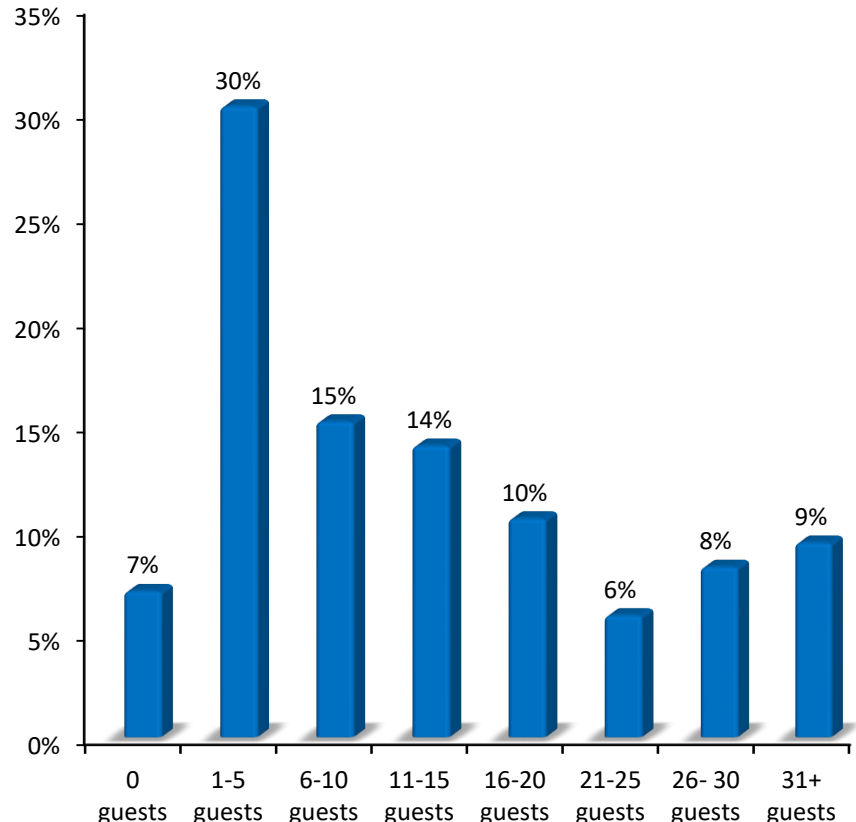


Please estimate the TOTAL number of overnight guests you hosted while staying in Dutchess County in the last year?

n=86

Observations:

- Part-time residents reported hosting between 1 and 10 guests annually.

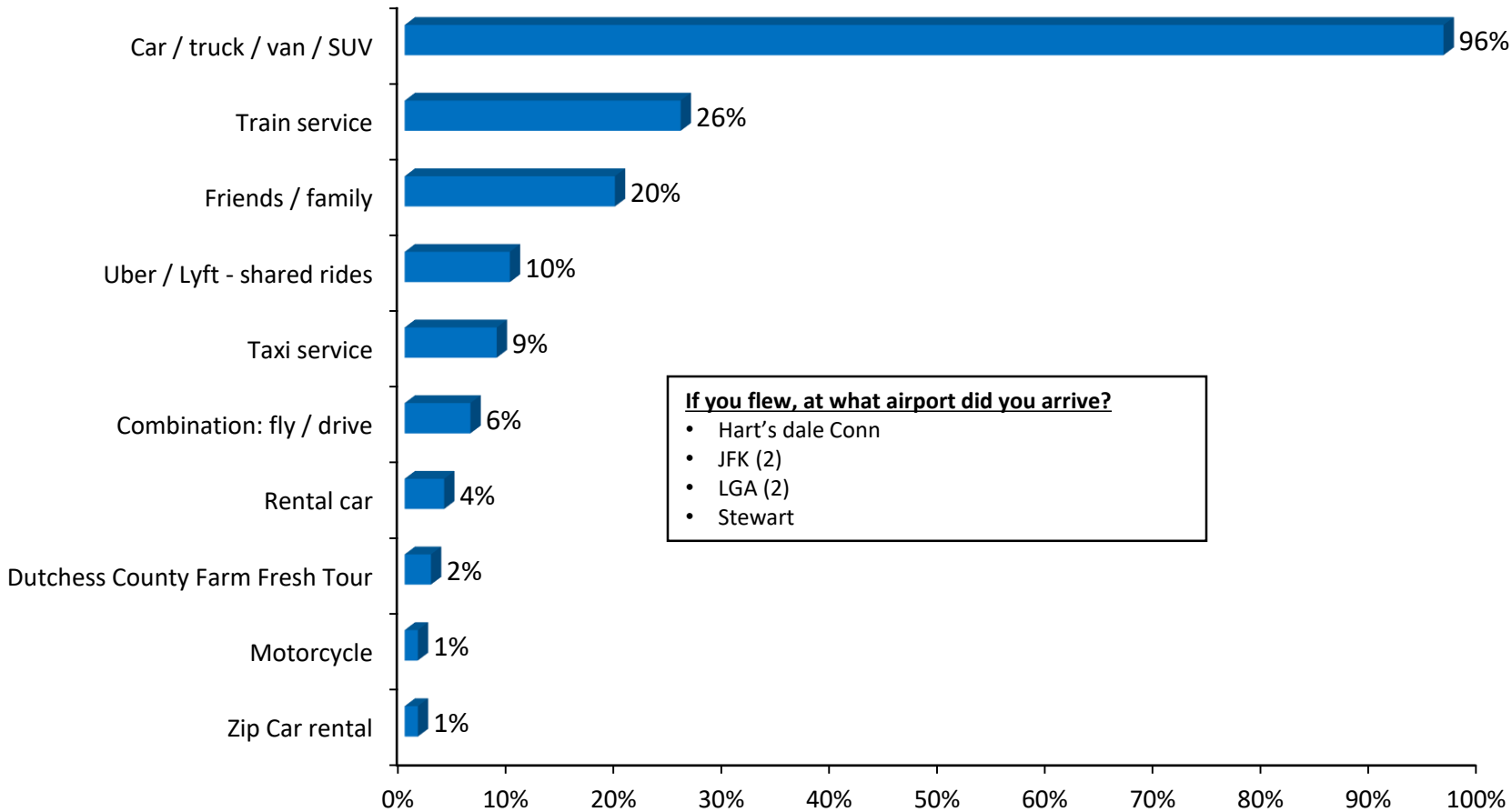


What mode of transportation did you use to get to and around Dutchess County?

n=82

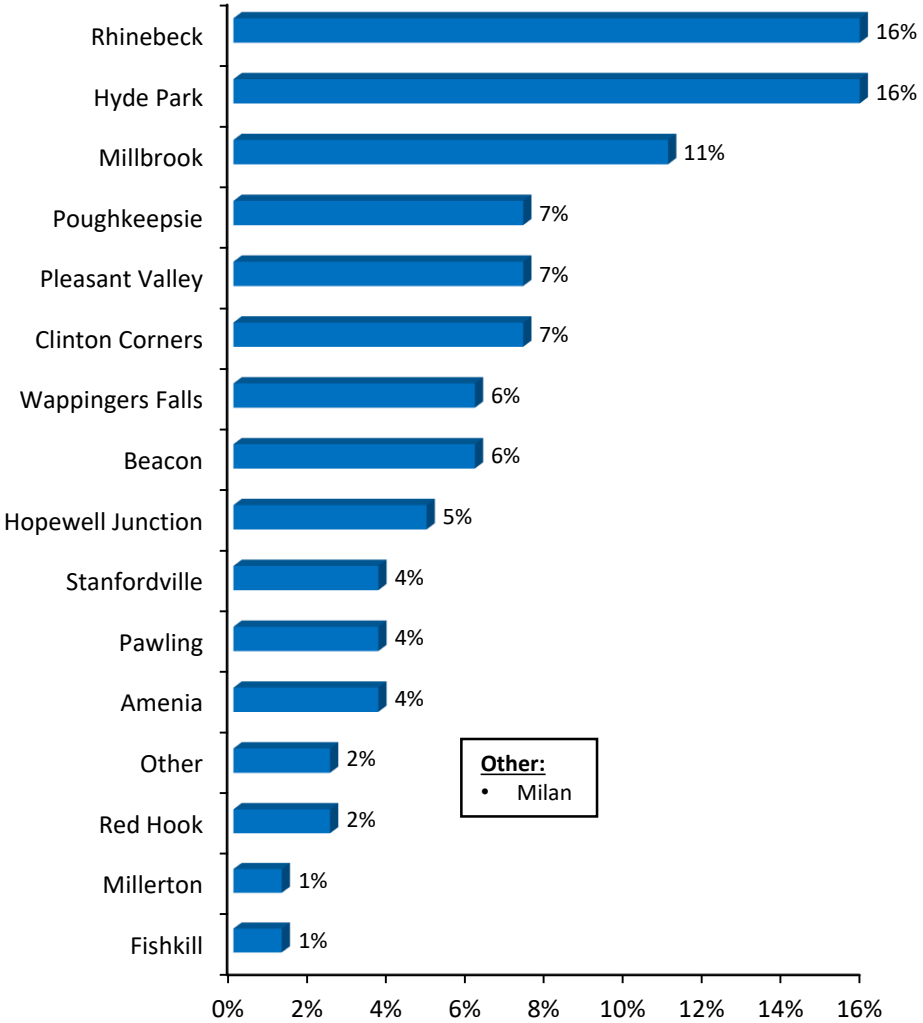
Observations:

- The vast majority of part-time residents reported getting to Dutchess County by automobile.



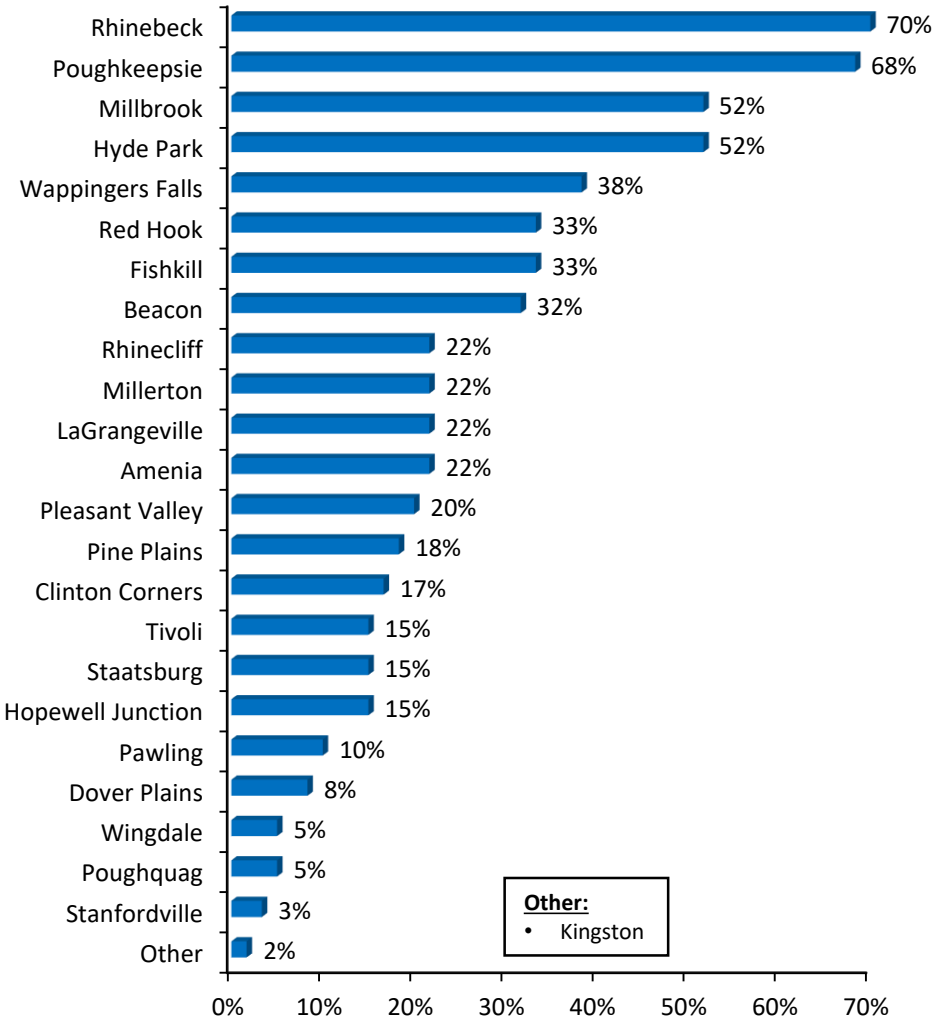
Which community was the PRIMARY destination of your most recent visit to Dutchess County?

n=82



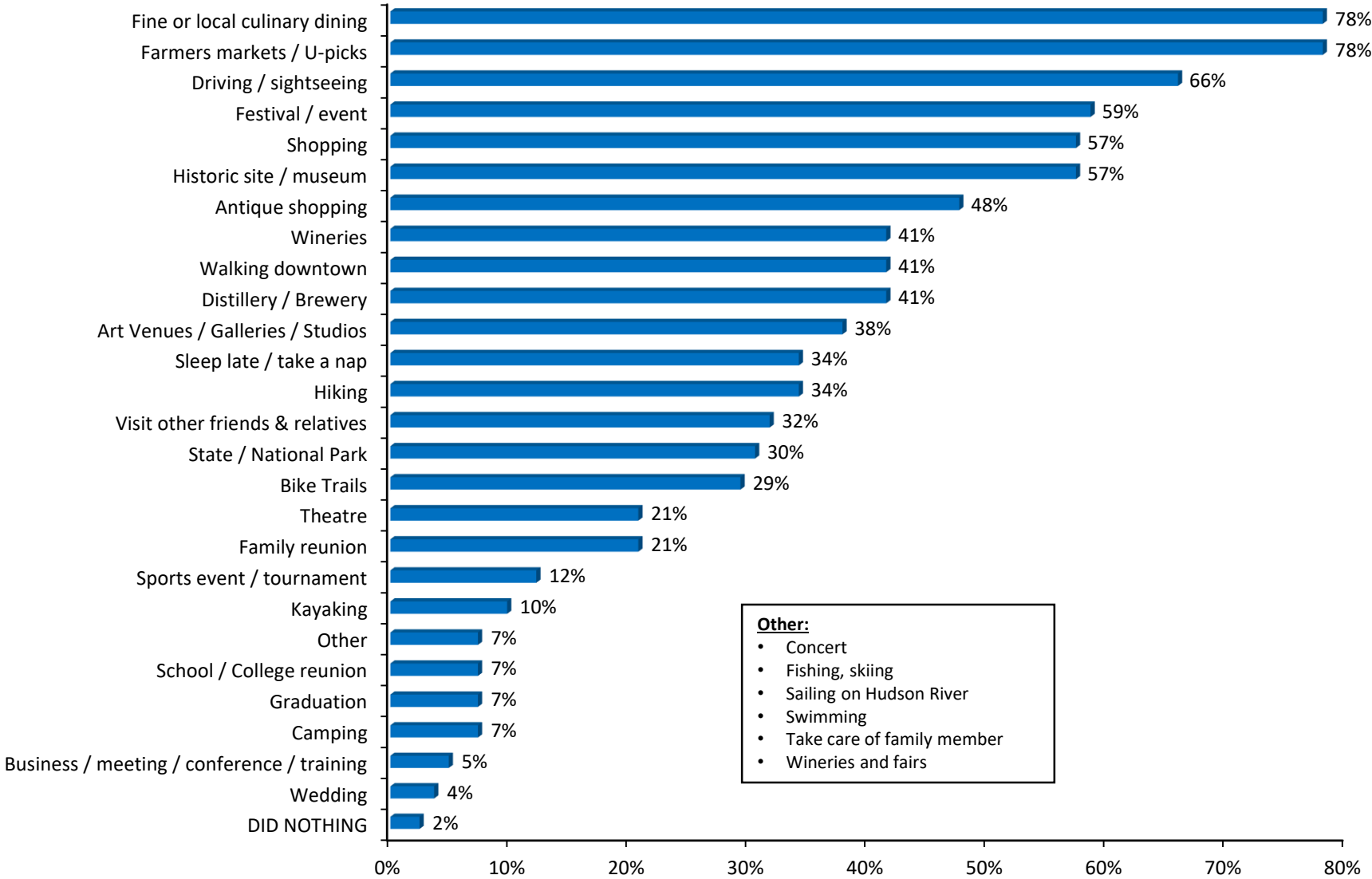
If this was your first visit to Dutchess County, please tell us what other communities you visited. If you have been to Dutchess County more than once, please tell us which communities you most frequently visit.

n=60



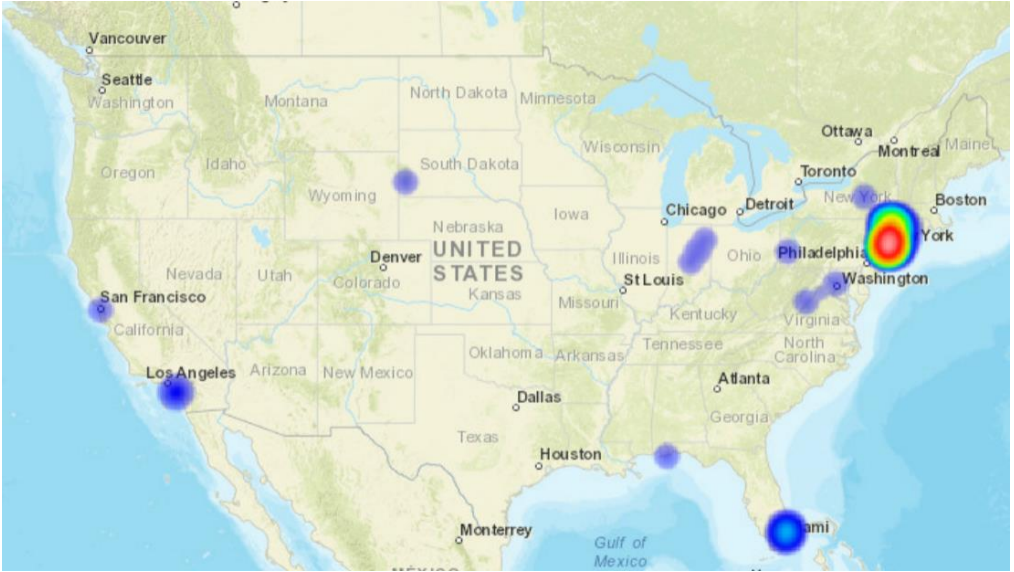
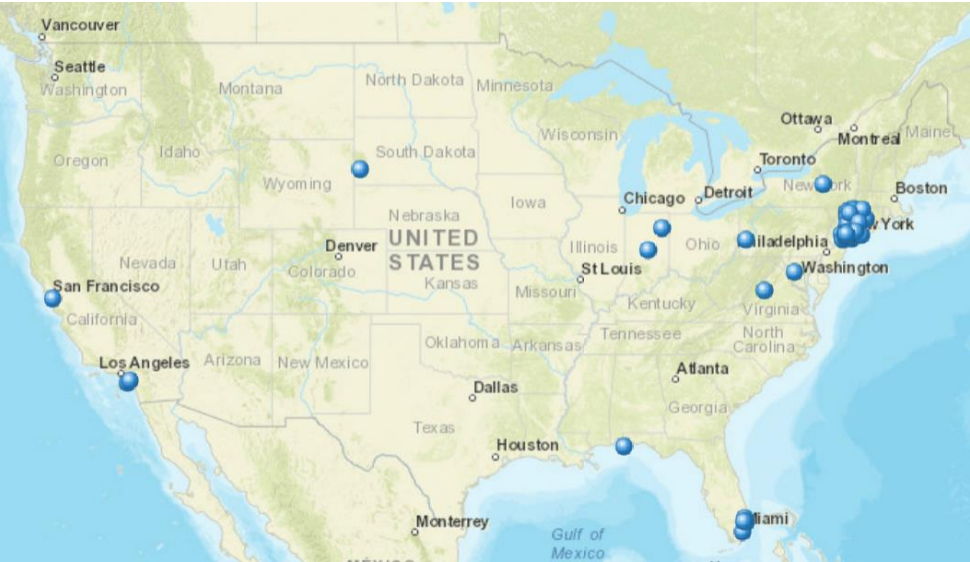
Check all activities you or a member of your travel party participated in as part of your visit to Dutchess County. If you are a frequent visitor to Dutchess County, tell us the activities you most often participate in.

n=82



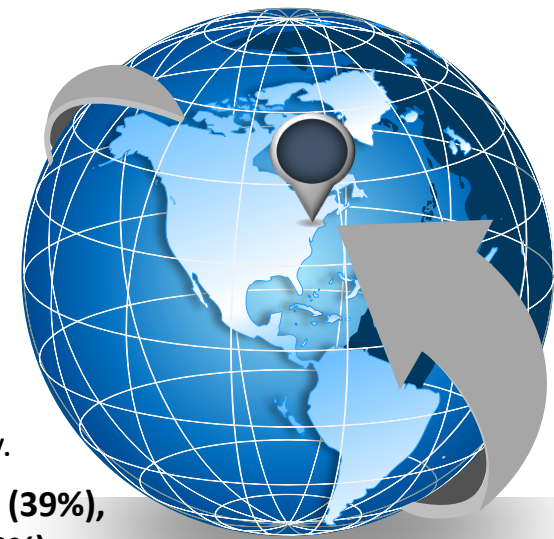
- Other:**
- Concert
 - Fishing, skiing
 - Sailing on Hudson River
 - Swimming
 - Take care of family member
 - Wineries and fairs

Where is your primary residence?



Dutchess County

Resident Survey Respondents



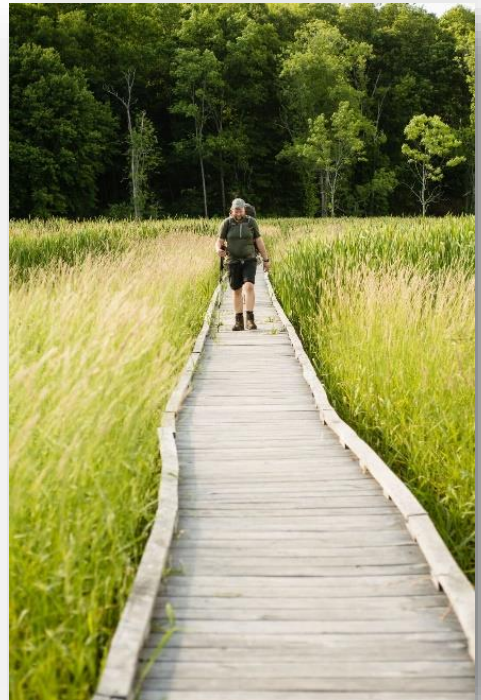
Summary & Observations:

- **1,168 respondents identified themselves as Dutchess County residents** in the survey.
- Resident respondents reported living in Dutchess County **less than a year to 20 years (39%), 21 to 40 years (32%) and those living in Dutchess County for more than 41 years (30%)** which represent a good cross section of resident longevity.
- As a destination, resident respondents reported **active outdoor destination** and **weekend getaway destination** as the **top rated characteristics** of Dutchess County. **Shopping destination** and a **place to retire** were the **lowest rated characteristics**.
- Residents rated their satisfaction with **historic sites/museums** and **agricultural tourism** as **highest** Dutchess County experiences. **Evening entertainment and unique shopping** are recognized as having the **lowest satisfaction** among residents.
- **Eastern outdoor recreational Dutchess experiences** reported by residents as **most visited or familiar with** were **and Appalachian Trail (86%) and Harlem Valley Rail Trail (77%)** while **having visited or being least familiar with** were **Dover Stone Church (59%) and Great Swamp (29%)**.
- **Hudson River waterfront shopping, dining & entertainment** as well as **Hudson River boat tour** were ranked **highest** as having the **most appeal** if offered in Dutchess County, matching what visitors also wanted to see in new offerings.



Overall Resident Respondent Demographics

Demographics		Residents of Dutchess County n=1,092
Average Age		54.9 years old
Generational Group		Teens – 0.1% Fifties – 27.9% Twenties – 4.9% Sixties – 27.2% Thirties – 11.5% Seventies – 11.7% Forties – 14.4% Eighties – 2.1%
Gender	Female	74.1%
	Male	25.4%
	Transgender	0.1%
	Prefer not to answer	0.5%
Occupation		Retired – 14.9%
	Administrative / Office Support	– 12.0%
	Education-professor/teacher	– 10.6%
	Healthcare industry	– 9.8%
	Professional / technical	– 6.0%
Life stage	Full-time employed(working outside home/self-employed)	49.2%
	Retired	22.7%
	Semi-retired	9.1%
	Part-time	6.5%
	Full-time employed (working remotely from home)	5.1%
	Other	3.6%
	Stay-at-home	3.2%
	Student	0.6%
Ethnicity	White/Caucasian	84.0%
	Prefer not to answer	8.6%
	Hispanic or Latino	3.7%
	Asian or Pacific Islander	2.5%
	Black or African American	2.5%
	American Indian or Alaskan Native	1.5%
Do you consider yourself to be:	Straights / heterosexual	87.9%
	Prefer not to answer	9.3%
	Gay / homosexual	1.8%
	Bi-sexual	1.0%

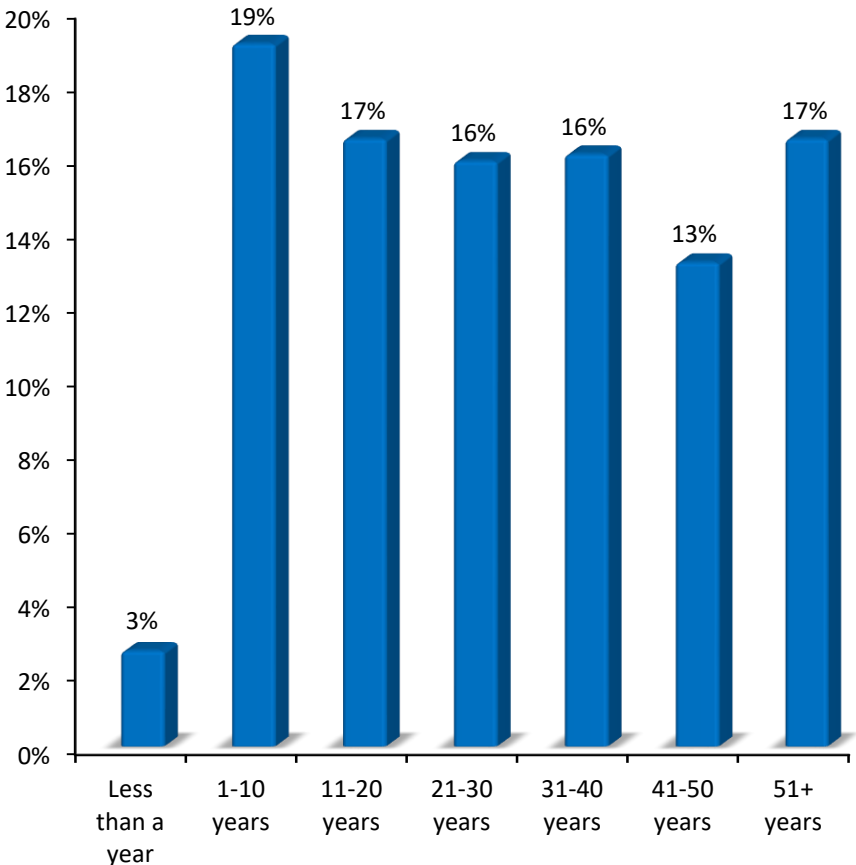


Resident Respondent Household
Please tell us how many years you have lived in Dutchess County.

n=1,168

Observations:

- Survey respondents represent a good cross section of residents who have lived in Dutchess County less than a year to 20 years (39%), 21 to 40 years (32%) and those living in Dutchess County for more than 41 years (30%).

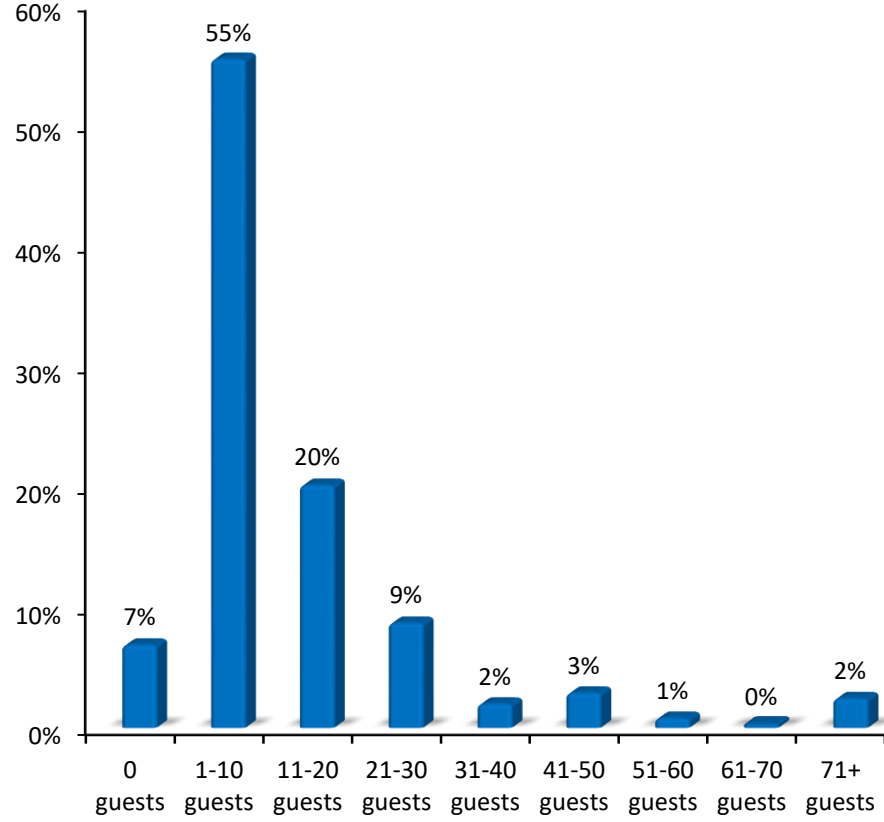


Please estimate the TOTAL number of overnight guests you hosted in your home last year?

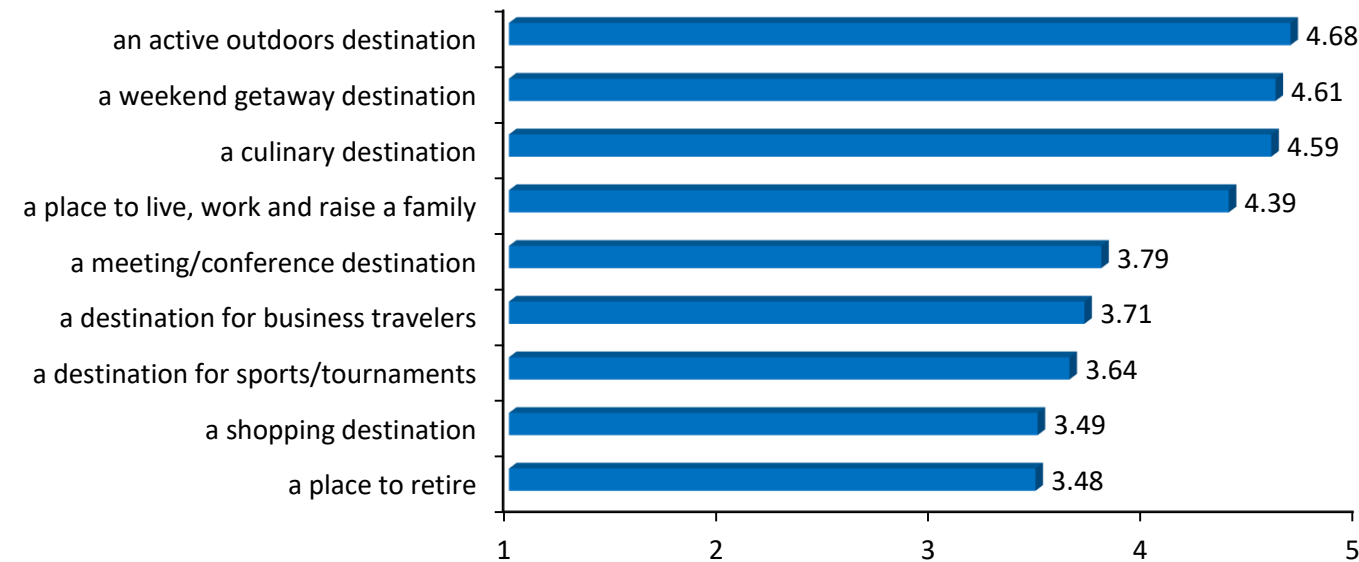
n=1,099

Observations:

- Over half (55%) of respondents reported hosting between 1 and 10 guests annually.



Rate Dutchess County on each of the following characteristics using the scale provided below. n=1,158



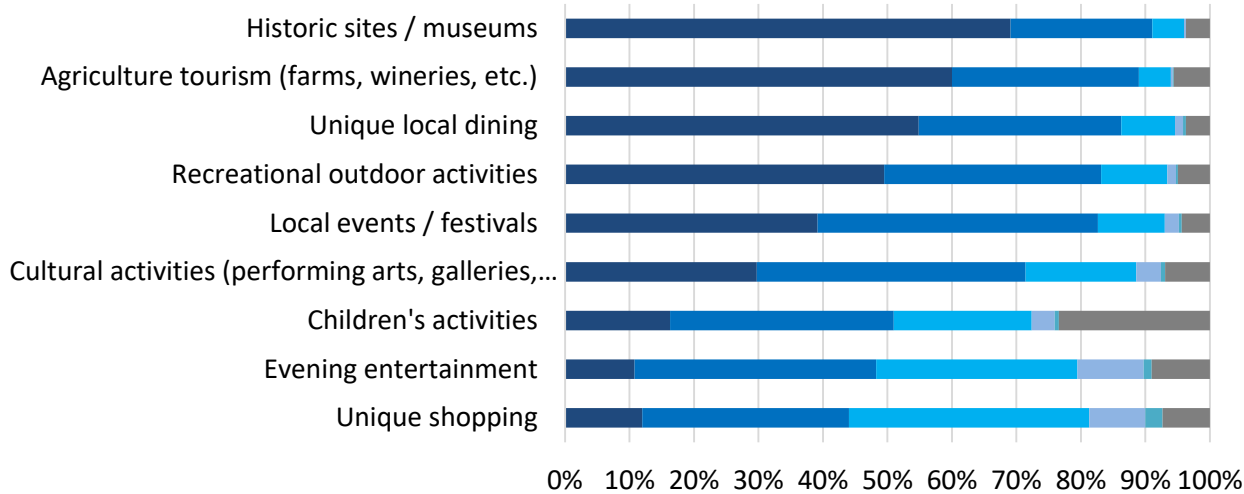
	Excellent	Good	Average	Poor	Very Poor	Weighted Average
an active outdoors destination	72.5%	23.4%	3.6%	0.4%	0.1%	4.68
a weekend getaway destination	67.9%	25.7%	5.6%	0.8%	0.1%	4.61
a culinary destination	68.6%	23.8%	6.1%	1.3%	0.2%	4.59
a place to live, work and raise a family	52.3%	37.1%	8.5%	1.8%	0.3%	4.39
a meeting/conference destination	21.4%	43.0%	29.3%	5.6%	0.7%	3.79
a destination for business travelers	18.6%	41.9%	32.2%	6.4%	1.0%	3.71
a destination for sports/tournaments	20.3%	36.5%	32.0%	9.7%	1.6%	3.64
a shopping destination	13.1%	36.6%	38.3%	10.1%	1.9%	3.49
a place to retire	19.9%	31.7%	29.5%	13.8%	5.0%	3.48

Observations:

- Resident respondents reported an active outdoor destination and a weekend getaway destination as the top rated characteristics.

When hosting friends, family or business guests in your home, please rate your level of satisfaction with the following experiences in Dutchess County. n=1,128

■ Excellent ■ Good ■ Average ■ Poor ■ Very poor ■ N/A



	Excellent	Good	Average	Poor	Very Poor	N/A	Weighted Average
Historic sites / museums	69.1%	22.0%	4.9%	0.3%	0.0%	3.7%	4.66
Agriculture tourism (farms, wineries, etc.)	60.0%	29.0%	5.0%	0.3%	0.2%	5.6%	4.57
Unique local dining	54.8%	31.4%	8.3%	1.2%	0.4%	3.7%	4.44
Recreational outdoor activities	49.5%	33.6%	10.3%	1.3%	0.3%	5.0%	4.38
Local events / festivals	39.2%	43.5%	10.4%	2.2%	0.5%	4.4%	4.24
Cultural activities (performing arts, galleries, etc.)	29.7%	41.7%	17.2%	3.8%	0.6%	7.0%	4.03
Children's activities	16.3%	34.7%	21.4%	3.6%	0.6%	23.4%	3.82
Evening entertainment	10.8%	37.5%	31.2%	10.3%	1.3%	9.0%	3.51
Unique shopping	12.0%	32.0%	37.3%	8.7%	2.7%	7.3%	3.45

Dutchess County

Research Findings & Recommendations

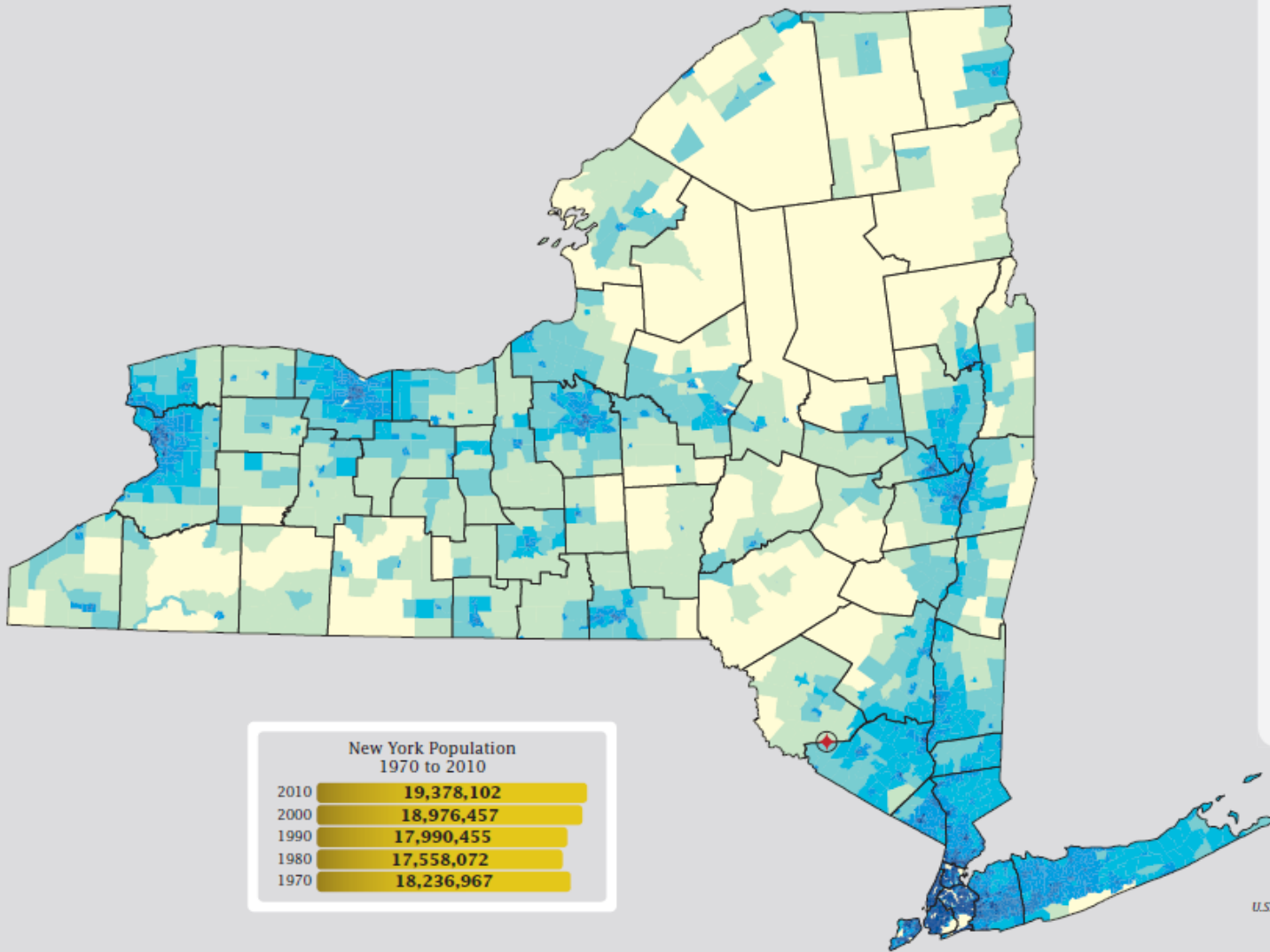


Summary & Observations:

- Dutchess County is in a very competitive tourism region and has made significant advancements as a travel destination in recent years.
- Focus on slow periods, if you promote when the hotels are sold out you are driving money into other counties.
- Pace marketing to accommodate growth in room supply driving increased room demand = marketing dollars.
- A charming town with unique shopping, dining and lodging IS a destination.
- Riverfront and active outdoors activities connected to towns and attractions are desired by visitors.
- Use trails to connect activities and attractions to towns and lodging. Active outdoors activities in combination with evening activities is a growth driver.
- Conference/event facilities are only successful for visitors when they are connected to lodging, dining and shopping with ample on-site parking.

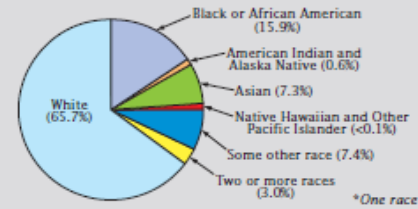
2010 Census: New York Profile

Population Density by Census Tract



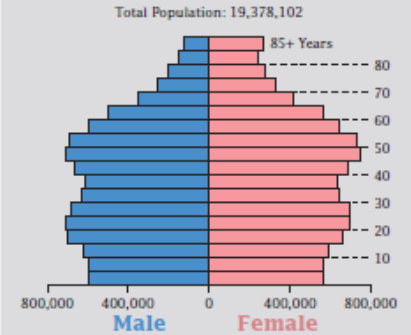
New York Population 1970 to 2010	
2010	19,378,102
2000	18,976,457
1990	17,990,455
1980	17,558,072
1970	18,236,967

State Race* Breakdown

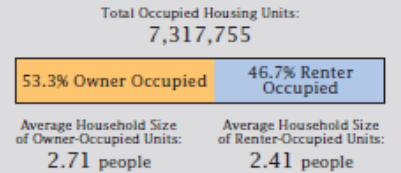


Hispanic or Latino (of any race) makes up 17.6% of the state population.

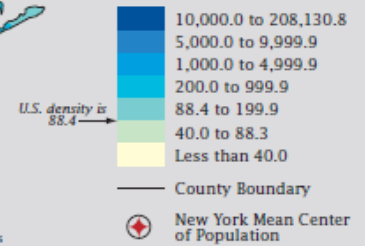
Population by Sex and Age



Housing Tenure

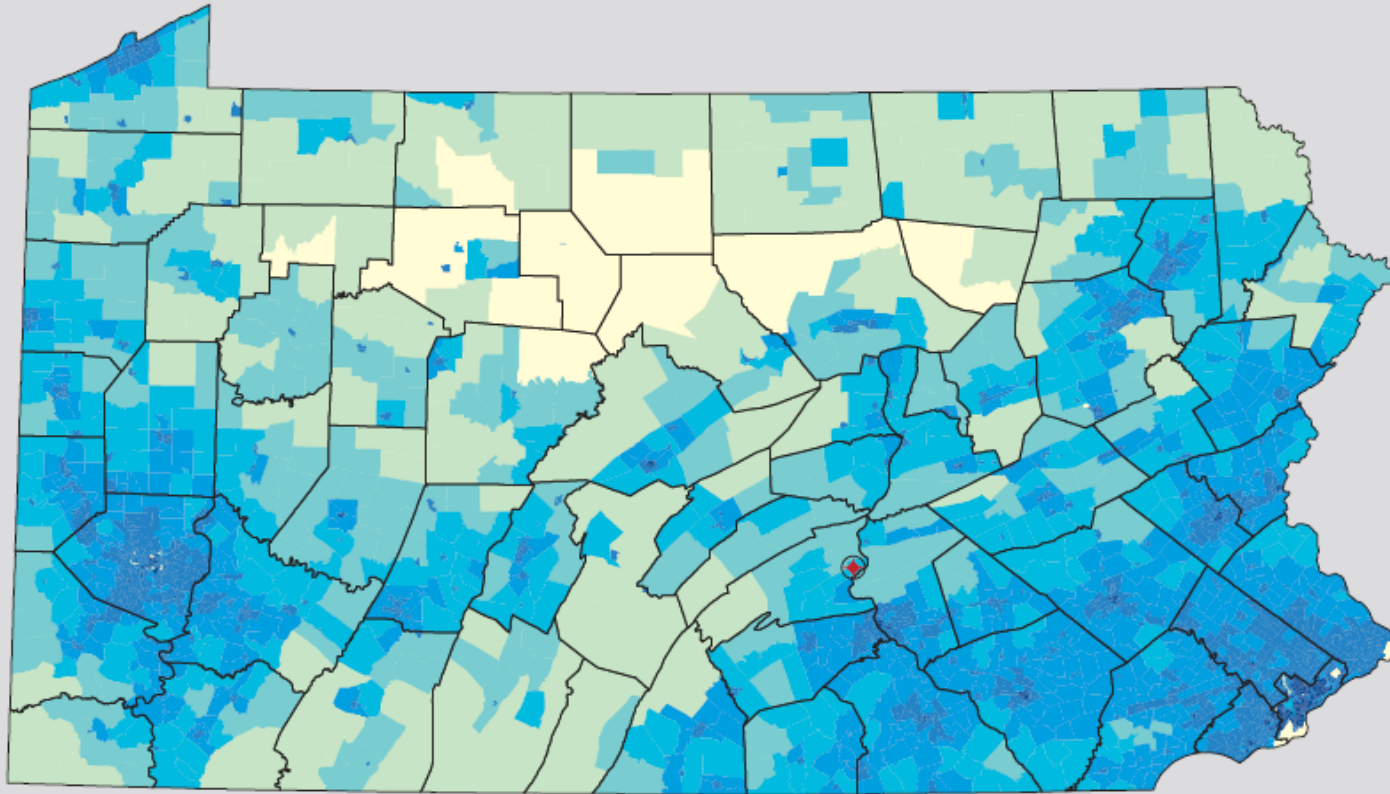


People per Square Mile by Census Tract



2010 Census: Pennsylvania Profile

Population Density by Census Tract

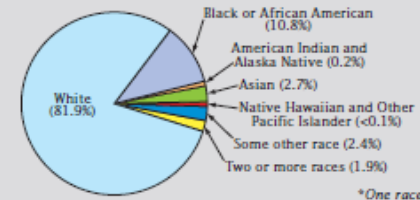


Pennsylvania Population 1970 to 2010

2010	12,702,379
2000	12,281,054
1990	11,881,643
1980	11,863,895
1970	11,793,909

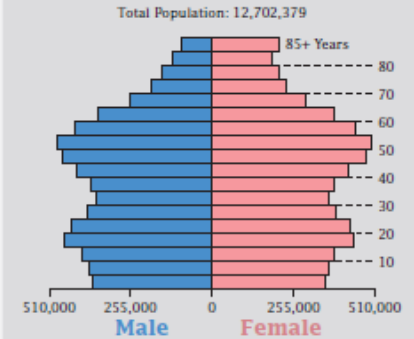


State Race* Breakdown



Hispanic or Latino (of any race) makes up 5.7% of the state population.

Population by Sex and Age



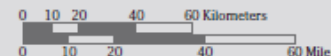
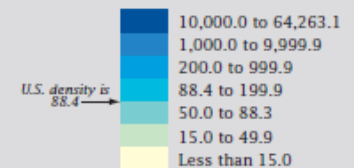
Housing Tenure

Total Occupied Housing Units: 5,018,904

69.6% Owner Occupied 30.4% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.57 people
Average Household Size of Renter-Occupied Units: 2.16 people

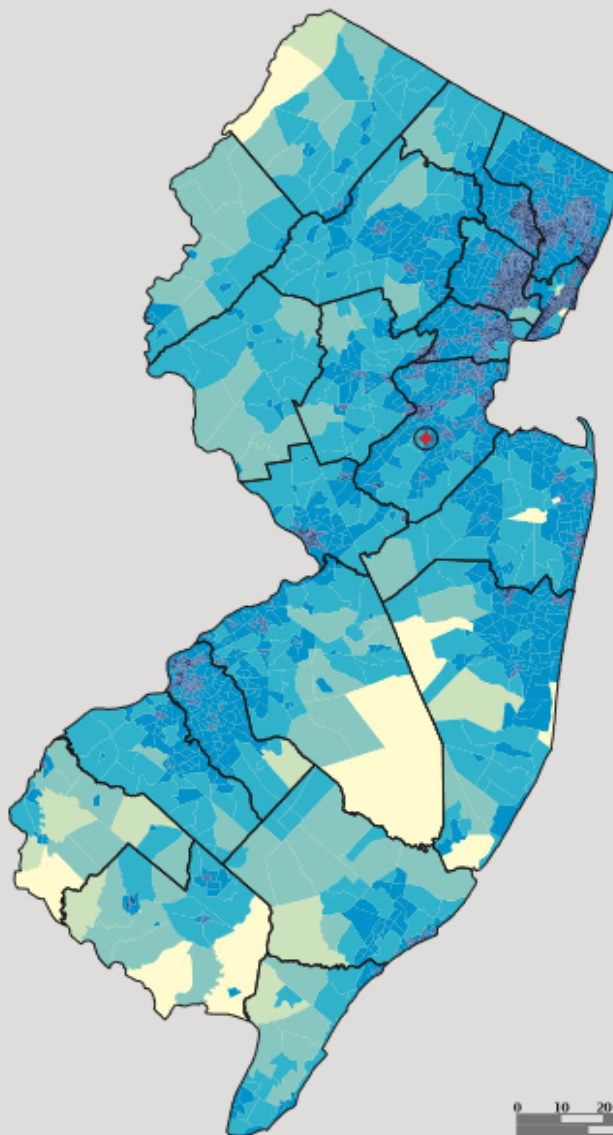
People per Square Mile by Census Tract



County Boundary
Pennsylvania Mean Center of Population

2010 Census: New Jersey Profile

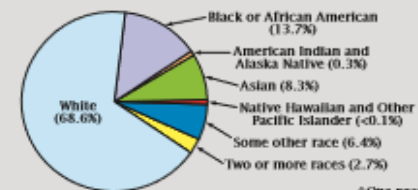
Population Density by Census Tract



New Jersey Population 1970 to 2010

2010	8,791,894
2000	8,414,350
1990	7,730,188
1980	7,364,823
1970	7,168,164

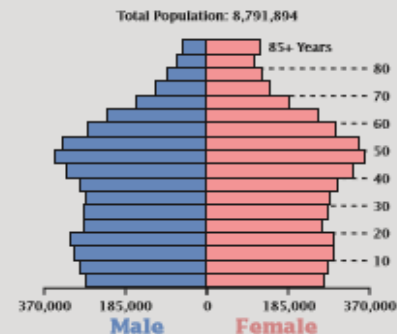
State Race* Breakdown



*One race

Hispanic or Latino (of any race) makes up **17.7%** of the state population.

Population by Sex and Age



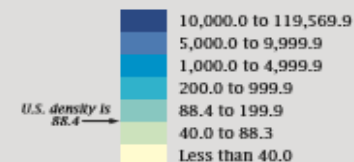
Housing Tenure

Total Occupied Housing Units: 3,214,360

65.4% Owner Occupied 34.6% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.79 people
 Average Household Size of Renter-Occupied Units: 2.47 people

People per Square Mile by Census Tract



U.S. density is 88.4

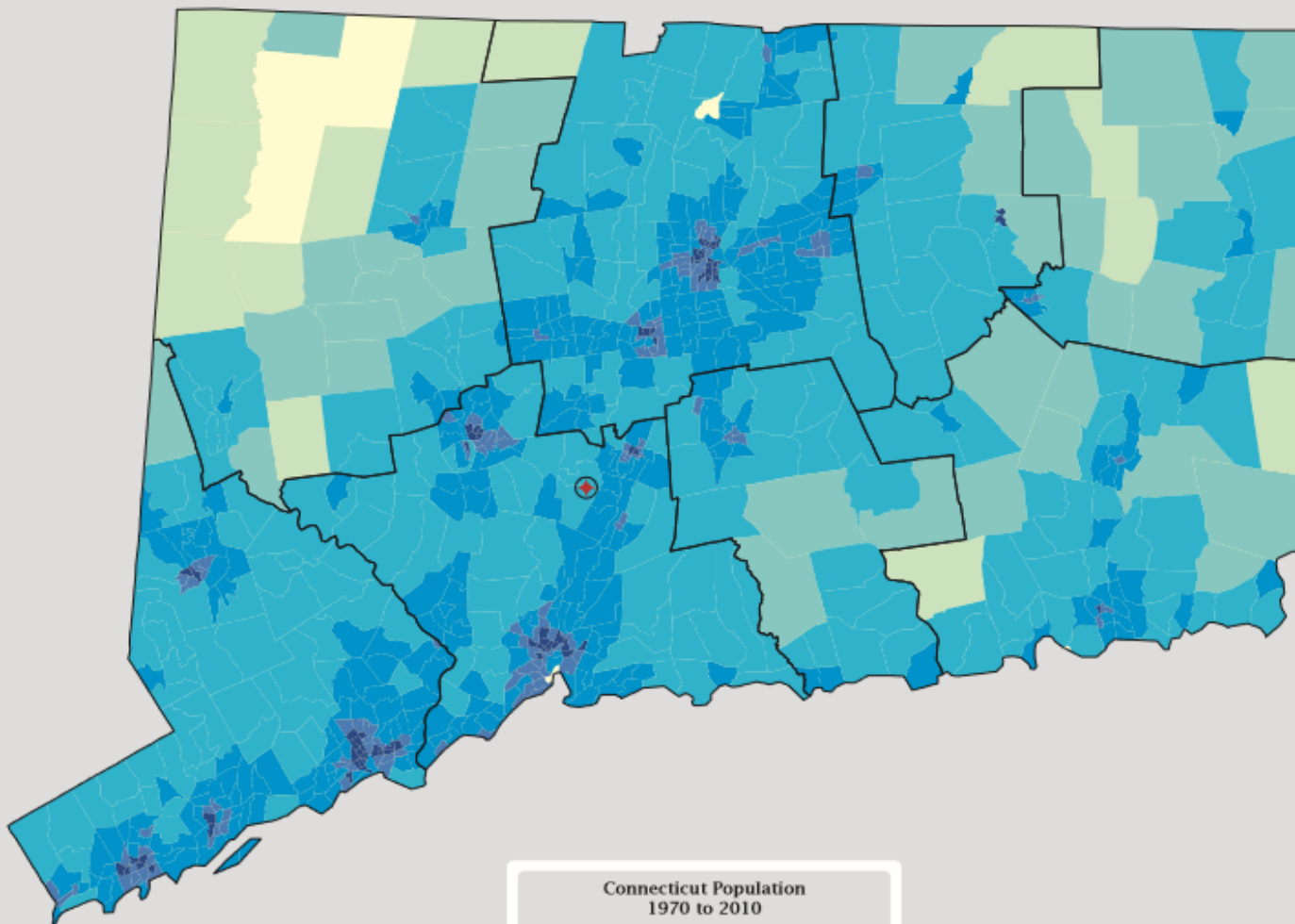
— County Boundary

⊕ New Jersey Mean Center of Population



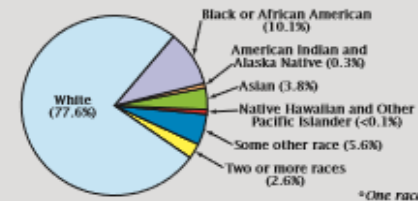
2010 Census: Connecticut Profile

Population Density by Census Tract



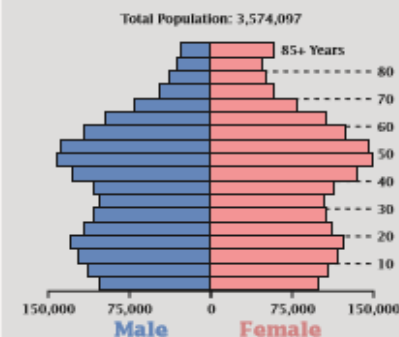
Connecticut Population 1970 to 2010	
2010	3,574,097
2000	3,405,565
1990	3,287,116
1980	3,107,576
1970	3,031,709

State Race* Breakdown



Hispanic or Latino (of any race) makes up **13.4%** of the state population.

Population by Sex and Age



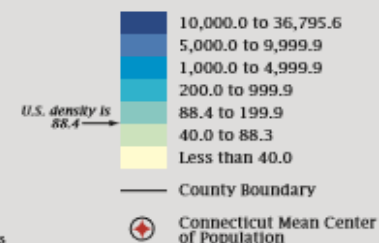
Housing Tenure

Total Occupied Housing Units: 1,371,087

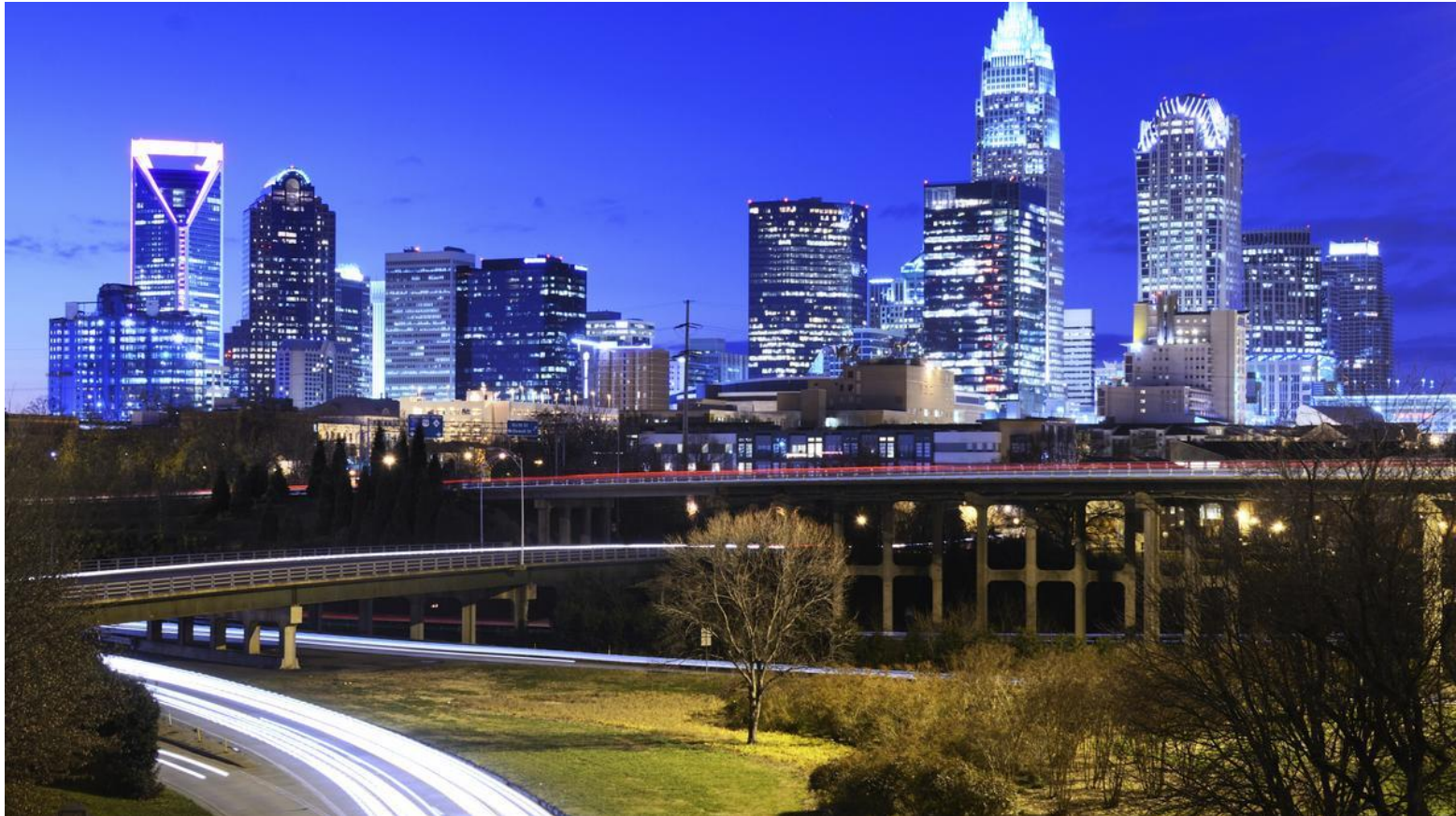
67.5% Owner Occupied 32.5% Renter Occupied

Average Household Size of Owner-Occupied Units: 2.64 people
 Average Household Size of Renter-Occupied Units: 2.27 people

People per Square Mile by Census Tract



Young Strategies, Inc. Research Team Experience



Young Strategies, Inc. (YSI) is a research and planning firm focusing on destination marketing organizations and travel destinations. The three principal members of this project team have conducted research and strategic planning with over 100 DMOs in twenty-six states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

Berkeley W. Young, President - Project Team Leader

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

Amy Stevens, Vice President - Lodging Market Analysis, Research Coordination

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

Larry Gustke, PhD - Destination Analytics - Oversight of Research Process and Validation

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.

McKenzie Graham, Office Manager & Research Coordinator- Data Tabulation and Analysis

A University of South Carolina graduate, McKenzie has been with Young Strategies for the last 3 years as Office Manager and Research Coordinator. McKenzie's role on the team is to work closely with constituents within the destination to collect data, monitor research return rates and data accuracy as well as assisting in the compilation of final report data and report development.