

Appendix C: Warren County Tourism Profile



2004

Warren County

Tourism Profile

The information contained in this profile was compiled by the Northern New York Travel and Tourism Research Center at SUNY Potsdam, primarily from data available through public agencies. Data is released by sources at different times and for different years and sometimes using different parameters, which should be noted when comparing different categories. Sources for each category are cited.

This profile uses several potential indicator categories of information to provide users with a statistical view of the tourism industry in Warren County, New York and – to a limited extent – its effects on the local economy. This profile is modeled after a prototype created by Gary DeYoung, Director of Tourism for the 1000 Islands International Tourism Council, Alexandria Bay, New York.

Additional information about Warren County and the tourism industry in Northern New York can be found on the Northern New York Travel and Tourism Research Center's web site: www.nnytourismresearch.org.

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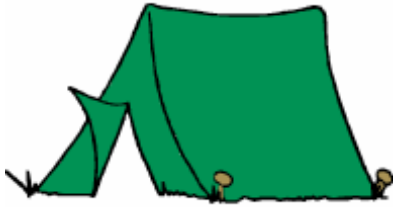


Lodging

Warren County has more lodging establishments than any other county in northern New York. However, almost two-thirds of the properties are seasonal in nature. Over 75% of the rooms are concentrated in Lake George and Bolton Landing. Warren County has almost exactly twice as many lodging *rooms* as campsites. The lodging inventory is diverse and includes hotels, motels, cabins/cottages, inns, bed and breakfasts, and full-service resorts. In 2004, Warren County instituted an occupancy tax.

Township	All Properties			Open Year Round			Open Seasonally		
	Establishments	Number of Rooms	Percent of Total Rooms	Establishments	Number of Rooms	Percent of Rooms	Establishments	Number of Rooms	Percent of Rooms
Horicon	7	38	0.4%	2	12	0.3%	5	26	0.5%
Thurman	1	17	0.2%	1	17	0.5%	0	0	0.0%
Bolton	32	939	10.1%	4	413	11.1%	28	526	9.4%
Chester	19	183	2.0%	12	123	3.3%	7	60	1.1%
Queensbury	14	532	5.7%	7	370	9.9%	7	162	2.9%
City of Glens Falls	3	134	1.4%	3	134	3.6%	0	0	0.0%
Hague	11	410	4.4%	6	383	10.3%	5	27	0.5%
Johnsburg	16	307	3.3%	14	271	7.3%	2	36	0.6%
Lake Luzerne	18	247	2.7%	5	65	1.7%	13	182	3.3%
Stony Creek	7	219	2.4%	5	209	5.6%	2	10	0.2%
Warrensburg	14	203	2.2%	13	180	4.8%	1	23	0.4%
Lake George	158	6,070	65.3%	38	1,549	41.6%	120	4,521	81.1%
Total	300	9,299		110	3,726	100.0%	190	5,573	100.0%

Source: Adirondack Regional Tourism Council's lodging database



Camping Facilities

Warren County has a total of 4,659 campsites at 39 public and private campgrounds. The camping facilities are spread throughout nine communities, with the largest concentration in the Lake George area. Approximately 62% of the available sites are located in private campgrounds, with the remaining one-third found at the six New York State parks located in the county.

Town Totals: Private and Public			
Town	Facilities	Sites	Percent of County
Horicon	2	97	2.1%
Thurman	2	79	1.7%
Chester	4	366	7.9%
Lake George	15	2,197	47.2%
Lake George Islands	3	387	8.3%
Hague	2	348	7.5%
Lake Luzerne	3	320	6.9%
Stony Creek	2	43	0.9%
Warrensburg	6	822	17.6%
Total	39	4,659	

Public Campground (State Parks)	Town	Total Sites
Eagle Point Public Campground	Chester	72
	Chester Total	72
Hearthstone Pt. Public Campground	Lake George	251
Lake George Battleground Campground	Lake George	68
	Lake George Total	319
Luzerne Public Campground	Lake Luzerne	174
	Lake Luzerne Total	174
Rogers Rock Public Campground	Hague	332
	Hague Total	332
Lake George Islands	Lake George Islands	387
	Lake George Is. Total	387
Public Campgrounds	Grand Total	1,284



Source: Lake George Travel Guide



Camping Facilities - Con't

Private Campgrounds	Town	Total Sites
Park Mountain Campgrounds	Horicon	12
Hidden Pond Campsites	Horicon	85
	Horicon Total	97
Crazy Creek Campground	Thurman	59
Northwoods Campground	Thurman	20
	Thurman Total	79
Green Acres By the Brook Campsite	Hague	16
	Hague Total	16
Sportsmans Paradise	Lake George	50
Adirondack Camping Village	Lake George	150
Adirondack Memories Camground	Lake George	20
King Phillips Campsite	Lake George	175
Lake George Campsite & RV Sales	Lake George	240
Lake George Escape Evergreen	Lake George	324
Lake George KOA	Lake George	80
Lake George RV Park	Lake George	350
Ledgeview Village RV Park	Lake George	132
Mohawk Camping on Lake George	Lake George	75
Mt. Kenyon Family Campground	Lake George	112
Rainbow View Family Campground	Lake George	125
Whippoorwill Campsites	Lake George	45
	Lake George Total	1,878

Source: Lake George Travel Guide

Private Campgrounds	Town	Total Sites
Half Mile Ranch & Campsite	Lake Luzerne	68
River Road Campground	Lake Luzerne	78
	Lake Luzerne Total	146
Ideal Campground	Chester	68
Smoke Rise	Chester	80
Wakonda Family Campground	Chester	146
	Chester Total	294
Down the Hill Campground	Stony Creek	40
Headwaters Guide Service, Inc.	Stony Creek	3
	Stony Creek Total	43
Bakersfield East	Warrensburg	80
Daggett Lake Campsite and Cabins	Warrensburg	60
Glen-Hudson Campsite	Warrensburg	100
Lake George/Schroon Valley Rsrt	Warrensburg	142
Schroon Lake Campsites	Warrensburg	300
Warrensburg Travel Park	Warrensburg	140
	Warrensburg Total	822
Private Campgrounds	Grand Total	3,375





Marine Recreation

Total boat use in Warren County has grown by 17% since 1995. A significant number of boats *used* in Warren County – 43-45% - are not registered to residents of the county, meaning that a large number of boats (“Difference” column) are brought into the county by visitors or seasonal residents. The county has also gained slightly in its New York market share, now accounting for 2.5% of all boats used in New York State. These figures show New York State boats registered in Warren County, both owned by county residents and non-residents. This chart does not show boats used temporarily in Warren County but registered elsewhere, or seasonal use of out-of-state registered boats.

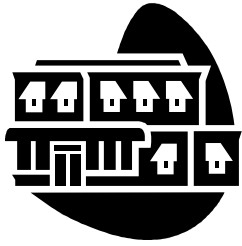
Location	Marinas	Wet Slips	Transient Slips
Lake George	7	364	34
Bolton	9	445	9
Queensbury	2	302	6
Hague	3	15	3
Total	21	1,126	52

Source: SeaGrant

Lake George is the focal point of marine recreation in Warren County. The lake has over 1,100 wet slips at 21 facilities around Lake George.

Year	By County of Principal Use	Year-To-Year Change	By County of Residence	Year-to-Year Change	Difference	New York State	Warren County as % of State
2001	13,383	0.6%	7,608	0.8%	5,775	528,113	2.5%
2000	13,306	1.9%	7,550	1.8%	5,756	527,426	2.5%
1999	13,064	2.6%	7,414	3.0%	5,650	526,321	2.5%
1998	12,729	1.6%	7,199	1.8%	5,530	516,783	2.5%
1997	12,529	4.4%	7,075	6.5%	5,454	514,538	2.4%
1996	12,004	8.5%	6,643	9.7%	5,361	494,667	2.4%
1995	11,064	45.1%	6,054	41.6%	5,010	455,189	2.4%
1985	7,627	n/a	4,274	n/a	3,353	340,300	2.2%

Source: New York State Statistical Yearbooks



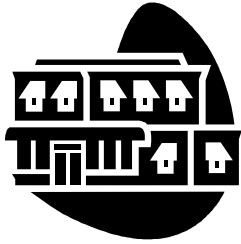
Tourism and Real Estate

The following charts show tourism-related property parcel counts in various categories, according to 2003 annual county assessment rolls. Additionally, the charts illustrate that seasonal residences are a factor in Warren County. The 2,706 seasonal residences on the tax rolls account for about 10% of all the residential parcels listed. (The average for seasonal residences in all counties in New York State is 2.2%.) Approximately one in every 10 homes in Warren County is seasonal. Some seasonal homes are occupied by a single family throughout the season, others are shared by families and some are rented out on a weekly or monthly basis outside of the sales tax system. Whether or not seasonal residents are considered “tourists,” anyone planning a seasonal business should be aware of the number of seasonal residences in the county.

Commercial Properties		
Class Code	Description	Parcel Count
420	Dining Establishments	1
421	Restaurants	101
422	Diners and Luncheonettes	30
423	Snack Bars, Drive-Ins, Ice Cream Bars	11
424	Night Clubs	5
425	Bar	14
426	Fast Food Franchises	14
432	Service and Gas Stations	31
451	Regional Shopping Centers	5
452	Area of Neighborhood Shopping Centers	23
453	Large Retail Outlets	12
481*	Downtown Row Type (with common wall)	65
482*	Downtown Row Type (detached)	98
483*	Converted Residence	247
484*	One Story Small Structure	199

Source: 2003 Annual Assessment Rolls, Office of Real Property

* Typically, class codes 481, 482, 483 and 484 contain many gift shop and other small retail facilities.



Tourism and Real Estate – Con't

Recreation and Entertainment Properties		
Class Code	Description	Parcel Count
532	Amusement Parks	9
551	Skiing Centers	11
552	Public Golf Courses	13
560	Improved Beaches	12
583	Resort Complexes	16

Residential Properties		
Class Code	Description	Parcel Count
210	One Family Year-Round Residence	20,822
210C	One Family Year-Round Residence	410
220	Two Family Year-Round Residence	1,179
230	Three Family Year-Round Residence	147
240	Rural Residence with Acreage	563
250	Estate	9
260	Seasonal Residences	2,706
270	Mobile Home	1,410
271	Multiple Mobile Homes	55
280	Residential - Multi-Purpose/Multi-Structure	400
281	Multiple Residences	11
283	Residence with Incidental Commercial Use	22

Public Parks, Wild, Forested and Conservation Properties		
Class Code	Description	Parcel Count
910	Private Wild and Forest Lands except for Private Hunting and Fishing Clubs	1,232
920	Private Hunting and Fishing Clubs	33
931	State Owned Land (Forest Preserve) in the Adirondack Park	972
961	State Owned Public Parks, Recreation Areas and Other Multiple Uses	21
962	County Owned Public Parks and Recreation Areas	15
963	City/Town/Village Public Parks and Recreation Areas	34

Source: 2003 Annual Assessment Rolls, Office of Real Property



Hunting

Hunting is becoming an increasingly popular visitor draw in some locations in northern New York. As the following charts show, deer hunting remains very popular, but bear and turkey hunting are drawing increasing numbers of outdoor enthusiasts.

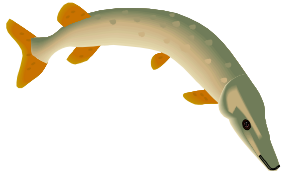
County	Deer Take
Warren	
2002	938
1998	919
1995	621

County	Turkey Take (Fall)
Warren	
2002	6
1998	3
1994	10

County	Black Bear Harvest
Warren	
2002	36
1998	21
1994	25

County	Turkey Take (Spring)
Warren	
2003	23
1998	17
1994	0

Source: New York State Department of Environmental Conservation



Fishing

Fishing is a popular activity in Warren County, among both residents and non-residents. In 2002, 6,770 fishing licenses were sold to non-residents, for a combined revenue stream of over \$164,000, ranking Warren County third among all northern New York counties in non-resident fishing license sales. *Revenues* from non-resident license sales also top those of resident license sales in Warren County.

	Resident Annual Fish	Non-Resident Annual Fish	5-day
1991	9,922	2,328	5,899
1992	8,575	2,387	5,697
1993	8,158	2,468	6,098
1994	7,927	2,084	5,415
1995	8,638	2,069	5,316
1996	8,511	2,303	5,039
1997	8,344	2,431	4,749
1998	8,805	2,374	4,970
1999	8,526	2,263	4,833
2000	8,605	2,518	5,060
2001	8,978	2,400	4,642
2002	8,475	2,343	4,427

	Fishing License			Hunting				Turkey
	Resident	Non-resident	5-day (NR)	Big game	Archery	Muzzleloader	Sportsman	Resident
Clinton	\$72,219	\$54,032	\$14,122	\$20,184	\$14,110	\$30,060	\$143,070	\$3,072
Essex	\$51,226	\$78,955	\$50,424	\$12,012	\$7,440	\$22,050	\$98,700	\$2,512
Franklin	\$49,817	\$39,116	\$28,682	\$31,977	\$9,840	\$28,870	\$119,250	\$2,337
Hamilton	\$23,955	\$28,009	\$30,872	\$2,088	\$1,530	\$3,470	\$20,700	\$685
Herkimer	\$50,163	\$10,064	\$7,554	\$25,440	\$16,750	\$15,970	\$135,690	\$5,188
Jefferson	\$153,400	\$118,694	\$113,829	\$46,452	\$26,210	\$58,250	\$251,790	\$8,220
Lewis	\$19,305	\$4,692	\$3,724	\$25,380	\$8,300	\$32,410	\$103,200	\$3,544
Oswego	\$157,716	\$447,746	\$311,942	\$34,752	\$37,220	\$37,520	\$271,080	\$9,375
St. Law.	\$111,018	\$70,195	\$46,035	\$66,468	\$30,110	\$86,080	\$310,020	\$8,385
Warren	\$110,415	\$79,821	\$84,471	\$21,240	\$14,610	\$27,160	\$143,610	\$3,670

Source: New York State Department of Environmental Conservation



Snowmobiling

Snowmobile registrations in Warren County have climbed steadily over the years, growing by 57% since 1995. The chart below shows the number of snowmobiles registered in Warren County and the number of machines registered to residents of the county. Significantly, the number of sleds used in the county but not registered to residents has also steadily increased and accounts for almost one-third of the total snowmobiles used in Warren County. This chart does not show how many snowmobiles are used temporarily in Warren County but are registered elsewhere, nor does it show seasonal use of out-of-state registered sleds.

County	Miles of Trails	Number of Clubs
Clinton	526	4
Essex	251	6
Franklin	250	5
St. Lawrence	441	8
Jefferson	n/a	2
Oswego	n/a	7
Hamilton	750+	8
Warren	251	4
Herkimer	596	11
Lewis	730	12

Source: *Snowmobile Digest 2003-2004*, New York State Snowmobile Association

Year	Total Registered in County	Year-To-Year Change	Registered to County Residents	Year-to-Year Change	Difference	New York State	Warren County as % of State
2001	3,418	0.6%	2,378	-0.3%	1,040	149,840	2.3%
2000	3,397	10.7%	2,386	8.2%	1,011	144,327	2.4%
1999	3,069	15.3%	2,206	11.3%	863	128,070	2.4%
1998	2,661	15.4%	1,982	14.5%	679	117,823	2.3%
1997	2,306	36.0%	1,731	36.1%	575	108,463	2.1%
1996	1,696	16.6%	1,272	12.0%	424	89,617	1.9%
1995	1,454	10.9%	1,136	16.5%	318	80,090	1.8%
1985	1,311	n/a	975	n/a	336	60,701	2.2%

Source: *New York State Statistical Yearbooks*



Highway Traffic Counts

How many vehicles are passing by your business every day? The numbers in the far right column show the Annual Average **Daily** Traffic Counts (AADT) for the designated section of highway. Please note that these are *annual* averages and the traffic counts are often affected by seasonality.

Route	Start Description	End Description	Count
9N	Saratoga County Line	ACC Route 87I Exit 21	4,072
	ACC Route 87I Exit 21	Start Route 9 OLAP	10,962
	Start Route 9 OLAP	Jct. Route 9L	19,380
	Jct. Route 9L	End Route 9 OLAP Lake George	19,381
	End Route 9 OLAP Lake George	Route 912Q ACC to Route 87I	12,231
	Route 912Q ACC to Route 87I	CR 35 Diamond Point Road	7,787
	CR 35 Diamond Point Road	CR 48	4,007
	CR 48	CR 18	4,028
	CR 18	CR 11A Bolton Landing	3,666
	CR 11A Bolton Landing	Padanarum Road	997
	Padanarum Road	Jct. Route 8 Hague	1,559
	Jct. Route 8 Hague	Essex County Line	2,931

Route	Start Description	End Description	Count
9	Saratoga County Line	Route 9L End Route 32 OLAP	13,879
	Town of Queensbury-Glens Falls	Jct. Route 254	15,891
	Route 9L Jct. End Route 32 OLAP	Glens Falls N City Line	15,891
	Jct. Route 254	St. Route 149 OLAP Con. to Route 87	13,913
	St. Route 149 OLAP Conn to Route 87	End Route 149 OLAP	18,118
	End Route 149 OLAP	Start Route 9N OLAP	12,466
	Start Route 9N OLAP	Jct. Route 9L	19,380
	Jct. Route 9L	End Route 9N OLAP Lake George	19,381
	End Route 9N OLAP Lake George	ACC Route 87I & Ref. Route 912Q	7,015
	ACC Route 87I & Ref. Route 912Q	ACC Route 87I CR 10	4,596
	ACC Route 87I CR 10	Jct. Route 418 Warrensburg	10,974
	Jct. Route 418 Warrensburg	CR 9	12,069
	CR 9	Jct. Route 28	6,097
	Jct. Route 28	Start Route 8 OLAP	1,935
	Start Route 8 OLAP	End Route 8 OLAP	2,541
	End Route 8 OLAP	ACC Route 87I Exit 26S	754
	ACC Route 87I Exit 26S	ACC Route 87I Exit 26N	3,608
	ACC Route 87I Exit 26N	Essex County Line	2,011

Source: New York State Department of Transportation



Highway Traffic Counts – Con't

Route	Start Description	End Description	Count
28	Hamilton County Line	Route 28N Jct. North Creek	2,585
	Route 28N Jct. North Creek	Route 8 Jct. Wevertown	3,045
	Route 8 Jct. Wevertown	CR 8 The Glen	3,209
	CR 8 The Glen	CR 40	3,524
	CR 40	End Route 28	2,876
87I	Saratoga County Line	Exit 18 CR 28 Under	41,751
	Exit 18 CR 28 Under	Exit 19 Route 254 Over	39,629
	Exit 19 Route 254 Over	Exit 20 Route 149 WB Over	40,795
	Exit 20 Route 149 WB Over	Exit 21 Route 9N Under	25,648
	Exit 21 Route 9N Under	Exit 22 ACC Routes 9, 9N, 912Q	24,136
	Exit 22 ACC Routes 9, 9N, 912Q	Exit 23 Warrensburg CR 25 Over	22,588
	Exit 23 Warrensburg CR 25 Over	Exit 24 Riverbank CR 11 Over	10,100
	Exit 24 Riverbank CR 11 Over	Exit 25 Chestertown Route 8 Under	10,185
	Exit 25 Chestertown Route 8 Under	Exit 26S ACC Route 9 Under	14,152
	Exit 26S ACC Route 9 Under	Exit 26N Route 9 NB on Over	12,076
	Exit 26N Route 9 NB on Over	Essex County Line	10,841

Source: New York State Department of Transportation



Tourism-Related Employment

These numbers provide a picture of tourism-related employment based on a few categories of employment selected from the numerous categories used by the New York State Department of Labor. Tourism is not a typical industry and cannot be represented accurately and in its entirety by a few clearly defined business categories as set forth under the NAICS classification system.

Employees in many businesses (retail, restaurant, gas stations) are serving tourists as well as local residents and it is impossible to determine the exact percentage of time spent on each. For example, obviously not all food service workers are employed directly by tourism. However, it is also obvious that many government workers (parks employees, etc.) do rely on tourism income to maintain employment.

The numbers contained in this chart are helpful indicators in assessing tourism's importance to a community however, they must be used in the context of other data. For example, it gives some perspective to the volume of tourism-related employment to compare the percentage of the county's workforce employed in tourism-dependent categories to the percentage of the workforce employed in that category across all of New York State.

In Warren County, for instance, about 23% of the total workforce is employed in the selected tourism-dependent categories shown, as compared to 11% for New York State as a whole.

Source: New York State Department of Labor

Warren County 2002 Annual Average Employment				
	Warren County	Percent of County	New York State	Percent of State
Total Persons Employed	34,027		8,272,276	
Gasoline Stations	351	1.03%	30,297	0.37%
General Merchandise Stores	927	2.72%	121,673	1.47%
Miscellaneous Store Retailers	315	0.93%	52,079	0.63%
Rental and Leasing Services	148	0.43%	29,698	0.36%
Arts, Entertainment, and Recreation *	1,223	3.59%	124,520	1.51%
Accommodation and Food Services ⁺	4,735	13.92%	513,213	6.20%

* Includes performing arts, spectator sports, amusement, gambling and recreation, museums, parks, historical sites

+ Includes accommodation, food services, and drinking places



Tourism and Retail Sales

Whether staying in a hotel, motel, campground or with friends and relatives, visitors spend money across a broad range of categories, making it difficult to determine exactly how much in sales can be attributed to the tourism industry. Some industry categories are obviously heavily tourism-dependent, such as accommodations and attractions. Visitors have an impact on restaurants and many surveys show that transportation and shopping comprise large portions of visitor spending. However, since local residents also spend heavily in these areas, it is difficult to see the direct impact of visitor spending on these industries.

By evaluating the taxable sales in relation to county population and average per capita income, the effects of visitor spending become more evident. Essentially, you have *this many* people who can purchase locally with *this amount of income*, but the county is selling *this much*.

The following charts show taxable sales data from March 1999 through February 2000, the most current information available. The charts show all ten northern New York counties for comparative purposes, plus New York State figures. The first chart shows total taxable sales in all the categories for all the counties. The second chart shows the taxable sales information on a per capita basis, with the total county population and average per capita income at the top of the chart.

Per Capita Income/Per Capita Sales

In Warren County, the per capita income is 79% of the New York State average, but the per capita spending is 37% above the state average, as illustrated by the taxable sales and per capita figures in these charts. Warren County outperforms the state average for per capita spending in a number of tourism sensitive categories and outperforms all of the other northern New York counties in several categories as well. Spending in the accommodations and food service category is more than double the state average, and the arts, entertainment and recreation category in Warren County is more than triple the state average. Spending on gasoline is 58% more than the state average and the food and beverage category is 46% more than the state average. Additionally, spending in the general merchandise category in Warren County is 57% above the state average.