



TOURISM
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Greene County Tourism Economic Impact Analysis and Strategic Goals

Summary of Findings and Recommendations
October 2010



Prepared by:
Tourism Economics
121, St Aldates, Oxford, OX1 1HB UK
303 W Lancaster Ave. Wayne PA 19087 USA
☎: +44 1865 268900 / +1 610 995 9600
🌐: www.tourismeconomics.com

The Tourism Economy in Greene County

Summary of tourism economy

- Tourism is an integral part of the Greene County economy.
- Visitors spent \$166 million in Greene County in 2008.
- Tourism sustains 2,125 jobs directly in tourism-related sectors and a total of 3,156 jobs including indirect impacts. This is 21.5% of total in-county employment across all sectors in Greene County.
- In 2008, tourism generated \$10 million in local taxes and \$11 million in state taxes. In the absence of tourism-generated local taxes, Greene County households would need to be taxed an additional \$545 per year to make up for lost local taxes.
- However, Greene County has been losing market share within the region as funding for marketing and advertising has waned and travel demands have changed.

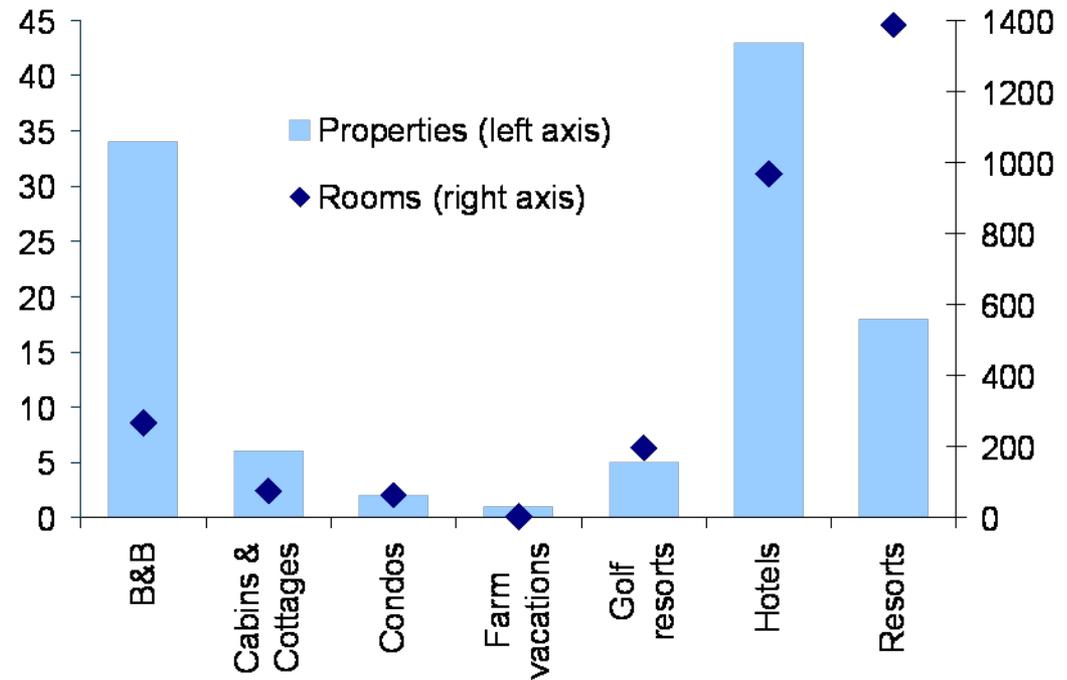
Summary of tourism economy

- Greene County has significant opportunities to increase the economic impact of tourism. Its lodging sector is diverse across B&Bs, hotels, motels, resorts, and cabins. In addition, the county is home to over 7,000 seasonal second homes. These recreational units represent a captive and consistent market as they are rented and used by their owners.

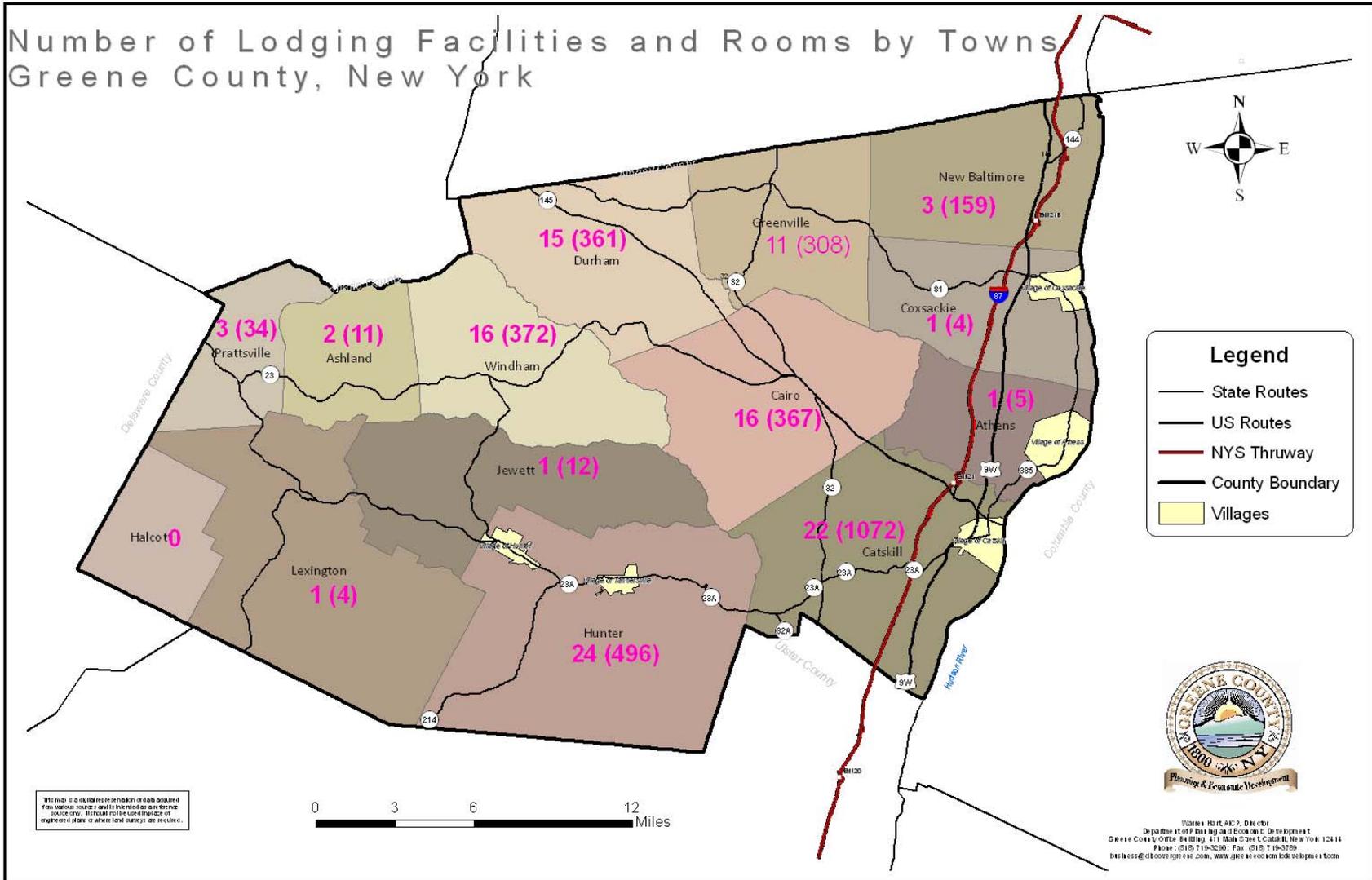
Tourism lodging assets

- Greene County hosts a broad range of lodging facilities with nearly 3,000 rooms across 109 properties.
- An assortment of 43 hotels and motels provides 968 rooms, and 18 resorts encompass 1,387 rooms for visitors. Bed & breakfasts offer an additional 267 rooms and golf resorts include another 196 rooms.
- The lodging assets of Greene County can be described as diverse, appealing to a range of markets across various seasons.

Lodging Supply in Greene County



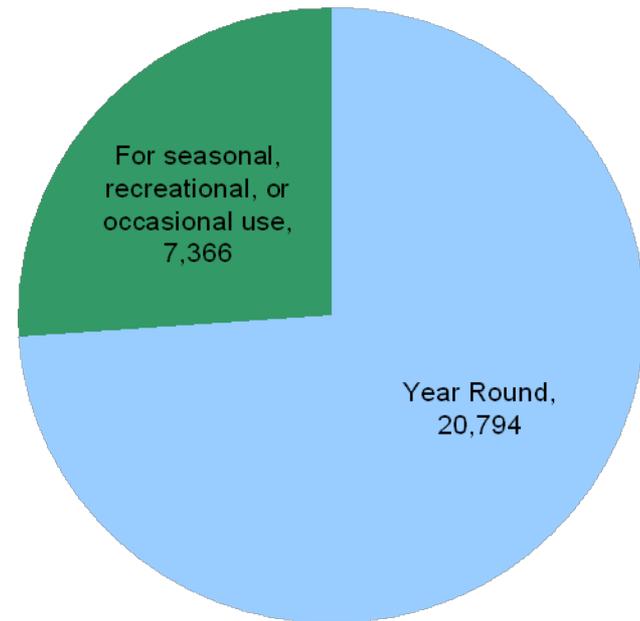
Tourism lodging assets



Tourism lodging assets

- The second home market is particularly strong in Greene County. A full 26% (7,366) of all housing units in Greene County are categorized as for “seasonal, recreational, or occasional use.”
- These homes are essentially visitor accommodations being used by renters, friends, family, and owners.
- In addition to providing accommodations for visitors, these homes are a source of ongoing economic benefits through property taxes, utilities, and maintenance.
- Further, these second homes provide a stable base of visitor activity even in the midst of economic recessions.

Housing Stock in Greene County



Source : US Census

Tourism lodging assets

Greene County Secondary Home Ownership Statistics



| municipality | Primary Residence | Secondary Homes | Ranking for Secondary Homes |
|-----------------|-------------------|-----------------|-----------------------------|
| Windham | 1035 | 956 | 1 |
| Athens | 956 | 875 | 2 |
| Tannersville | 76 | 836 | 3 |
| Coxsackie | 1521 | 693 | 4 |
| Catskill | 3204 | 636 | 5 |
| Lexington | 178 | 635 | 6 |
| Durham | 820 | 633 | 7 |
| New Baltimore | 303 | 624 | 8 |
| Greenville | 1036 | 594 | 9 |
| Hunter | 45 | 569 | 10 |
| Cairo | 2259 | 501 | 11 |
| Jewett | 575 | 450 | 12 |
| Haines Falls | 31 | 370 | 13 |
| Prattsville | 126 | 287 | 14 |
| Ashland | 342 | 236 | 15 |
| Lanesville | 30 | 171 | 16 |
| Halcott | 5 | 150 | 17 |
| Halcott Center | 20 | 136 | 18 |
| Hannacroix | 42 | 93 | 19 |
| West Coxsackie | 45 | 72 | 20 |
| Climax | 9 | 21 | 21 |
| Earlton | 52 | 21 | 22 |
| Ravena | 10 | 19 | 23 |
| Palenville | 37 | 18 | 24 |
| Maplecrest | 1 | 11 | 25 |
| E Durham | 0 | 7 | 26 |
| Twilight Park | 0 | 7 | 27 |
| Coeymans Hollow | 4 | 5 | 28 |
| Smith's Landing | 10 | 4 | 29 |
| Freehold | 11 | 3 | 30 |
| Surprise | 1 | 3 | 31 |
| Taines Falls | 0 | 2 | 32 |
| Acra | 0 | 1 | 33 |
| Cornwallville | 3 | 1 | 34 |
| Medusa | 0 | 1 | 35 |
| West Kill | 0 | 1 | 36 |

| Type | number | Percentage |
|--------------------------------|--------|------------|
| Secondary Homes | 9643 | 43% |
| Primary Residence | 12818 | 57% |
| Non-Vacant Residential Parcels | 22461 | 100% |

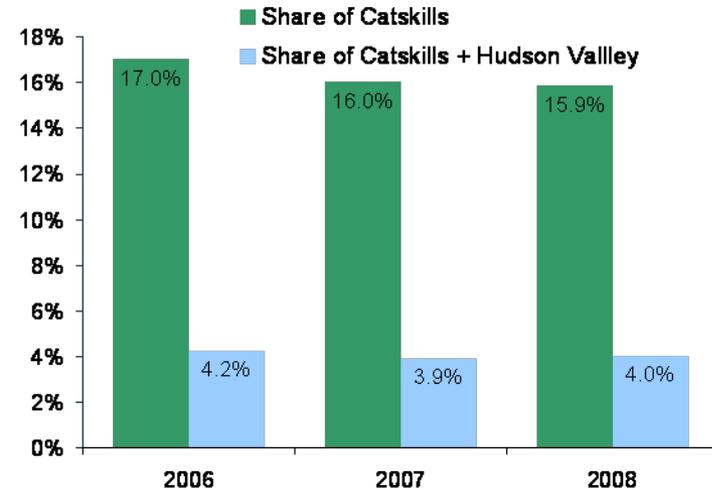
Note: Second-home properties are identified as non-vacant residential parcels with out-of-county billing addresses.

Tourism competitiveness

- Greene County has been steadily losing market share of the region's tourism spending. Greene County has a healthy market position with 15.9% of the region's tourism spending in 2008. However, this has declined over the past few years. In 2006, 17% of visitor spending in the Catskills region went to Greene County compared to 15.9% in 2008.
- In an expanded territory, including the Hudson Valley region, the same trend is observable. Greene County's market share registered at 4.0% in 2008 when it stood at 4.2% two years earlier.

Greene County Tourism Market Share

Share of regional tourism spending



Source : Tourism Economics

| Visitor Spending | 2006 | 2007 | 2008 | % Change (2008 v 2006) |
|-------------------------------------------|---------------------|---------------------|---------------------|------------------------|
| Thousand \$ | | | | |
| Greene County | \$ 166,573 | \$ 161,197 | \$ 166,159 | -0.2% |
| Catskills Region | \$ 977,710 | \$ 1,005,709 | \$ 1,045,703 | 7.0% |
| Hudson Valley Region | \$ 2,943,224 | \$ 3,113,656 | \$ 3,089,709 | 5.0% |
| Total Catskills and Hudson | \$ 3,920,934 | \$ 4,119,366 | \$ 4,135,412 | 5.5% |
| Greene Share of Catskills | 17.0% | 16.0% | 15.9% | |
| Greene Share of Catskills + Hudson Valley | 4.2% | 3.9% | 4.0% | |

Visitor Spending in Greene County

- Visitors to Greene County injected \$166 million into the local economy in 2008.
- Lodging facilities received 22% of this sum. Second homes comprise another 26% through rental income and owner expenses. Recreation, including skiing and golf, represents 16% of the total. Compared to the rest of the Catskills, Greene County is particularly strong in recreation with significant golf and skiing assets.
- Skiers and their travelling parties spent \$50 million in Greene County in 2008. Of this, approximately \$35 million was spent at ski facilities while the remainder was spent on lodging, meals, and other ancillary services. The large majority of this spending was by non-local skiers. According to a 2008 survey, 65% of all ski visitors stayed overnight in Greene County. The two major ski resorts in Greene County employed 1,651 people last year, the majority of them (1,439) as seasonal employees.
- Another \$5.8 million was spent at the county's five golf resorts, supporting 183 employees in season, and 41 employees year round.

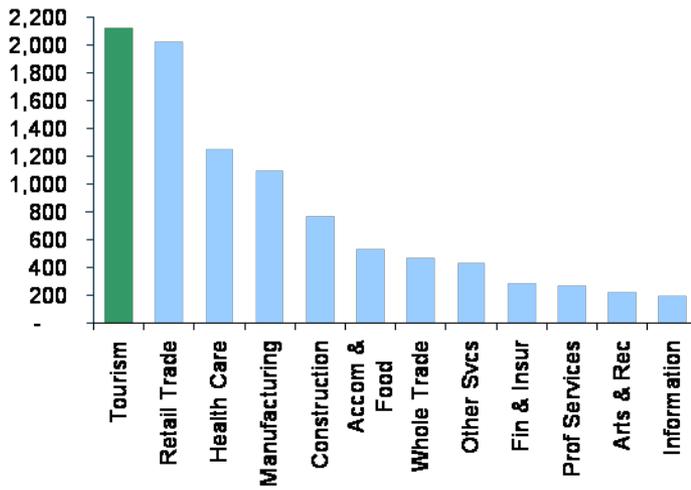
| 2008 Visitor Spend '000s | Lodging | Recreation | F&B | Retail & Svc Stations | Transport | Second Homes | Total |
|--------------------------|------------------|-----------------|------------------|-----------------------|-----------------|------------------|--------------------|
| Delaware | \$9,129 | \$1,571 | \$8,857 | \$7,122 | \$865 | \$54,130 | \$81,675 |
| Greene | \$36,304 | \$26,587 | \$24,740 | \$25,364 | \$9,990 | \$43,174 | \$166,159 |
| Sullivan | \$116,728 | \$7,142 | \$32,277 | \$57,178 | \$2,124 | \$110,560 | \$326,010 |
| Ulster | \$182,201 | \$11,796 | \$98,886 | \$107,182 | \$32,517 | \$39,278 | \$471,859 |
| TOTAL | \$344,363 | \$47,096 | \$164,760 | \$196,846 | \$45,496 | \$247,143 | \$1,045,703 |
| Greene Share of Total | 11% | 56% | 15% | 13% | 22% | 17% | 16% |

Tourism employment

- Tourism is the single largest employer in Greene County. On a full-time equivalency basis, 2,125 jobs were sustained by tourism activity in 2008. No other sector (after tourism-related jobs are backed out) approaches this level of employment generation.
- Retail trade, the second largest private sector employer, employs just over 2,000 persons after tourism-related retail is excluded. Health care, the third largest private sector employer, employs just over 1,200 persons.

Ranking employment in Greene County

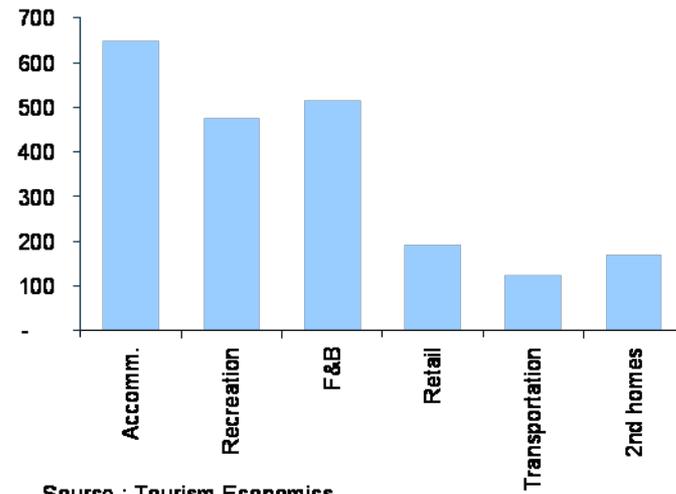
Private sector employment, FTE, excluding tourism in related sectors



Source : Tourism Economics, BLS

Tourism employment in Greene County

FTE jobs



Source : Tourism Economics

Tourism employment

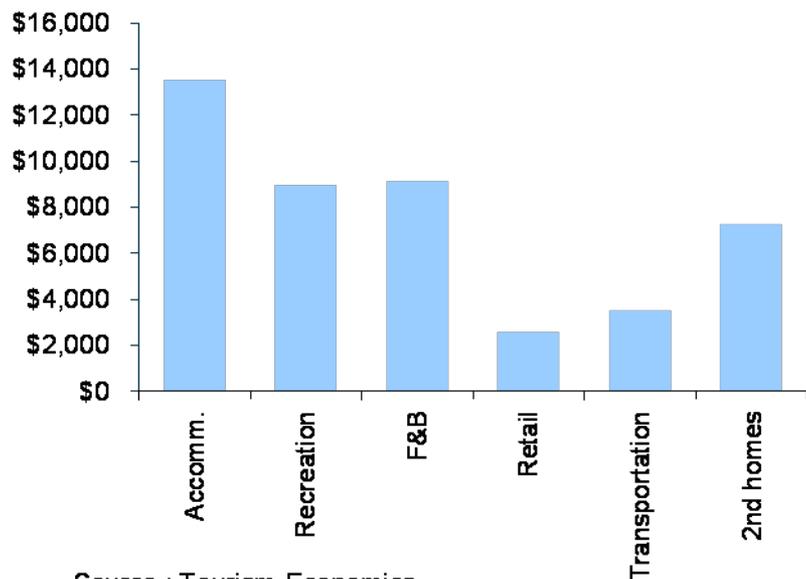
- The total employment impact of tourism is more significant. Including indirect (supply chain) and induced (incomes spent in the local economy) impacts, tourism generated 3,156 jobs in Greene County last year. This represents 21.5% of all jobs in the county and sets Greene County as the most reliant on tourism of any county in the Catskill Region.

| 2008 Tourism Employment | Accommodation | Recreation | F&B | Retail | Transportation | Second Homes | Direct | Total (Direct, Ind., Induced) | Share (Direct) | Share (Total) |
|-------------------------|---------------|------------|--------------|--------------|----------------|--------------|---------------|-------------------------------|----------------|---------------|
| Delaware | 134 | 60 | 252 | 47 | 25 | 212 | 730 | 1,056 | 4.3% | 6.2% |
| Greene | 649 | 475 | 514 | 192 | 125 | 169 | 2,125 | 3,156 | 14.5% | 21.5% |
| Sullivan | 1,433 | 201 | 836 | 260 | 63 | 432 | 3,226 | 4,667 | 12.4% | 18.0% |
| Ulster | 2,183 | 285 | 2,308 | 504 | 407 | 154 | 5,841 | 8,449 | 9.4% | 13.6% |
| TOTAL | 4,399 | 863 | 4,253 | 1,003 | 621 | 966 | 12,106 | 17,512 | 10.1% | 14.6% |

Tourism personal income

- The tourism sector is equally important in terms of personal income. In 2008, households received just over \$66 million in wages and related income as a result of tourism activities. This was 13.1% of all wages earned in Greene County last year.

Tourism income in Greene County
thousands



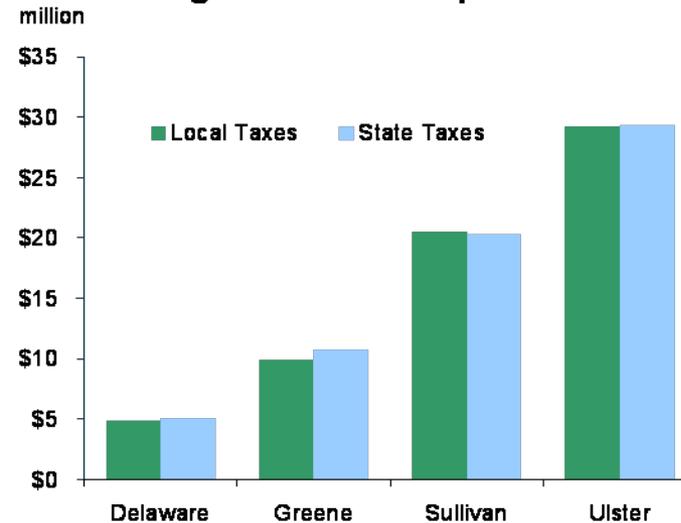
Source : Tourism Economics

| 2008 Tourism Labor Income, '000 | Accommodation | Recreation | F&B | Retail | Transportation | Second Homes | Direct | Total (Direct, Indir., Induced) | Share (Direct) | Share (Total) |
|---------------------------------|---------------|------------|----------|----------|----------------|--------------|-----------|---------------------------------|----------------|---------------|
| Greene | \$13,555 | \$8,969 | \$9,156 | \$2,589 | \$3,485 | \$7,235 | \$44,990 | \$66,306 | 8.9% | 13.1% |
| Catskills Region | \$128,575 | \$9,908 | \$60,979 | \$20,093 | \$15,871 | \$41,418 | \$276,844 | \$470,558 | 6.8% | 11.5% |

Tourism taxes

- Tourism is New York State's second largest industry (some say it is number one) and the tourism industry in the four-county Catskills region generated over \$1.5 billion dollars in revenues and is responsible for over 10% of its regional employment.
- Tourism in the Hudson Valley Region generates the third most tourism dollars in the state, behind only New York City and Long Island. Tourism in the Hudson Valley generated \$4.7 billion and is responsible for 6% of all employment in the region.

Catskills region tourism tax proceeds



Source : Tourism Economics

Tourism taxes

- Tourism is also essential to the provision of public services in Greene County. Over \$20 million in state and local taxes were generated by tourism activity in 2008. Of this, just under \$10 million in taxes were received by county, municipal and other local government organizations—primarily through sales and property taxes.

| Tourism-Generated Taxes | |
|--------------------------------|------------------|
| (US\$ Thousand) | |
| | Total |
| Federal Taxes | \$ 21,160 |
| Corporate | \$ 3,550 |
| Indirect Business | \$ 1,594 |
| Personal Income | \$ 7,623 |
| Social Security | \$ 8,394 |
| State and Local Taxes | \$ 20,706 |
| Corporate | \$ 3,781 |
| Personal Income | \$ 3,296 |
| Sales | \$ 6,189 |
| Property | \$ 6,381 |
| Excise and Fees | \$ 751 |
| State Unemployment | \$ 307 |
| TOTAL | \$ 41,866 |

Tourism taxes

- Tourism spending in Greene County in 2010 is estimated to generate approximately \$10 million in local taxes (about \$4 million to the County, \$4 million to local school districts, and \$2 million to towns, villages, fire and other special districts) and \$11 million in state taxes. Greene County currently generates approximately \$25 million in sales tax and \$19 million in property tax revenue. Therefore, the tourism industry generates about 10% of the total direct tax revenue that the County receives on an annual basis.

| Tourism-Generated Taxes, 2008 | Local Taxes | State Taxes | Total |
|-------------------------------|---------------------|---------------------|----------------------|
| Delaware | \$4,888,389 | \$5,086,893 | 9,975,281 |
| Greene | \$9,944,876 | 10,761,010 | 20,705,886 |
| Sullivan | \$20,513,570 | \$20,304,612 | 40,818,182 |
| Ulster | \$29,247,136 | \$29,388,402 | 58,635,537 |
| TOTAL | \$64,593,970 | \$65,540,916 | \$130,134,887 |

Tourism taxes

- In the absence of tourism-generated local taxes, Greene County households would need to be taxed an additional \$545 per year to make up for this lost income of \$10 million.

Catskills region tourism tax proceeds

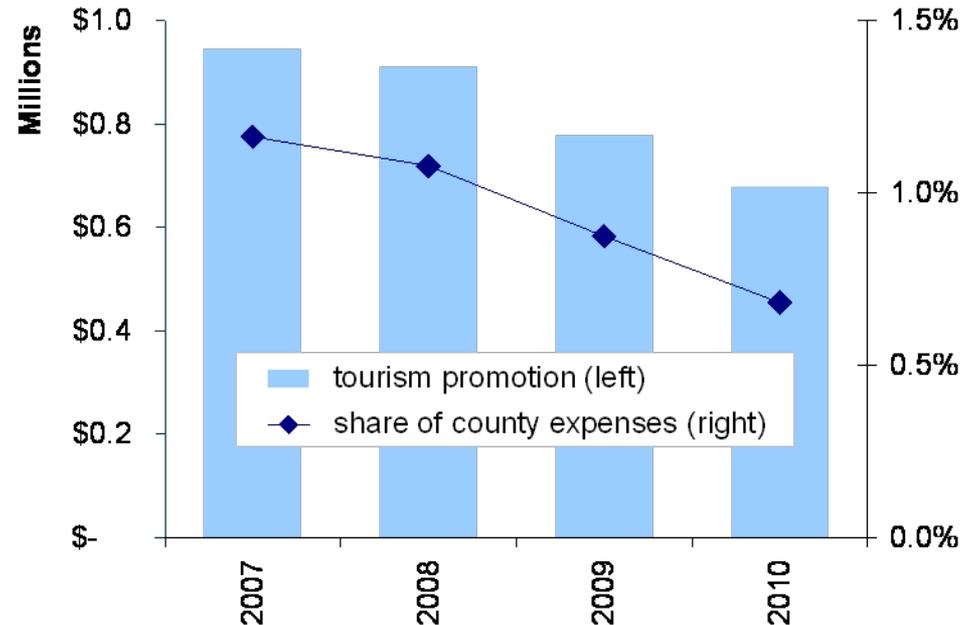


Source : Tourism Economics

Funding of tourism promotion

- The overall share of the county budget which is allocated to tourism has fallen consistently over the past four years, from 1.2% in 2007 to 0.7% in 2010.

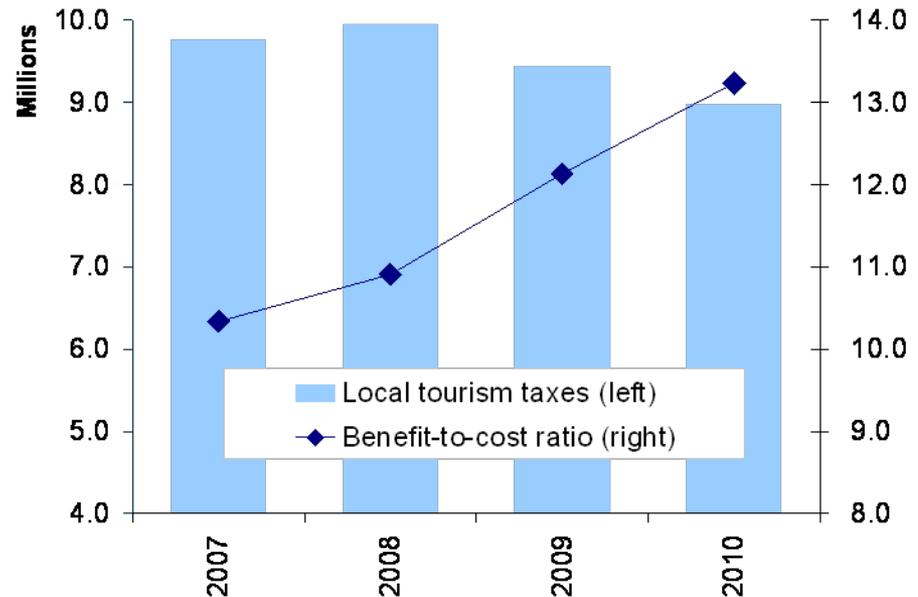
Greene County tourism funding over time



Funding of tourism promotion

- While tourism funding has declined 28% since 2007, taxes generated by tourism have declined by only 8%.
- One way to put this into perspective is to compare tourism tax receipts to total outlays for promotion. In 2007, this “benefit-to-cost ratio” registered 10.3. This means that the county received \$10.30 per dollar invested in tourism promotion. In 2010, this ratio is expected to rise to 13.2 as the tourism budget falls by more than tourism taxes.

Greene County tourism taxes over time



Tourism Strategic Goals

Summary of Goals for 2010-2011

If the Greene Tourism Office is to garner greater long-term success and a more robust economic vitality for the County, the following issues should be addressed:

- Restructure the outmoded “tourism promotion” nomenclature to a “destination marketing organization DMO” heightening the importance of a business model that primarily functions as a business broker between business and the consumer, with the mission of producing incremental economic impacts for local visitor businesses and the host community, through “non-resident visitor receipts”, resulting tax revenue and local jobs generated or sustained by this spending.
- Expand “consolidated marketing” programs consistent with the Destination Marketing Organization strategy.
- Brand Greene County more closely with the Northern Catskills and the Hudson Valley.

Summary of Goals

- Streamline marketing program to prioritize and focus on measurable high value initiatives and partnerships consistent with its importance to the county.
- Develop destination marketing campaigns that incorporate major regional appeals along with new co-operative advertising partnerships.
- Package key drivers and assets of Greene County that can enhance the value of the visitor's experience in Greene County, increase visitor length of stay and boost overnight visitation.
- Establish a new performance based marketing plan approach for Greene Tourism that incorporates return on investment (ROI) criteria and quantifiable dollar results to be achieved for all major Tourism Office marketing initiatives.

Summary of Goals

- Harness the power of the Internet through Web technology that enhances the Tourism Office website with a new and expanded internet marketing plan that will bring thousands of new visitors.
- Build a program of expanded media publicity to reach millions of additional potential customers and produce heightened destination brand awareness, interest and desire to take action and visit.
- Develop creative, state-of-the-art online advertising that will more effectively motivate thousands of new visitor parties to the destination and provide millions of dollars more in positive economic returns.
- Form a Tourism Advisory Committee to build industry support to fulfill important tourism industry relationships: providing important industry counsel on development efforts, serving in a supportive role for the DMO, bringing special insights to the tourism management and market planning processes, and helping assure transparency for the organization.

Summary of Goals

- Conduct training and educational forums for Greene County Tourism businesses, to demonstrate the importance of marketing, internet advertising, on-line booking, and keeping up with the changing market dynamics of tourism visitors.



Tourism Marketing Functions and Initiatives

Tourism Function

- Staff and Operate Tourism Visitor Center (7 days a week)
- Prepare Annual Marketing and Communications Plan, Production Schedule
- Design and Implement Campaigns
- Host, Manage, Update, Provide Content to Websites (Greene Tourism, ILNY, Catskill Region, Hudson Valley Region)
- Design Advertising Materials, Web, Print and Radio (Travel Guide, Brochures, Maps, Event Calendar, Publications, Billboards)
- Distribute Advertising Materials Locally and Regionally
- Attend Trade and Consumer Travel Shows
- Coordinate Event/Festival Activities at the Catskill Point
- Coordinate Press Releases, Events, Ribbon Cuttings
- Public Relations and Social Networking
- Host Familiarization Tours (Tourism Industry Writers)
- Administer Contracts for Events and Tournaments
- The Official Destination Marketing Organization for the County and Tourism Industry Groups and Businesses
- Represent Greene County at State and Regional Tourism Legislative Functions

Highlighted Marketing Initiatives 2010-2011

Focus on Several Key Areas:

- New Website with Search Engine Optimization
- Single brand message with more effective integrated marketing program across electronic and print media
- New Packaging and Capitalizing on Greene's Assets
- New On-line Destination Marketing Campaigns
- Public Relations and Social Media (Facebook, Youtube, etc.)
- Performance Based Goals (Economic Impacts)
- Training and educational forums on the importance of marketing and internet advertising.

Marketing Campaigns (examples)



Hunter & Windham Mountains
in the Great Northern Catskills,
New York's Other Skyscrapers

Catskill Lodge
Ski & Stay
From \$69 pp

Cave Mountain
Ski & Stay
From \$73 pp

Glen Falls
Valentine's
From \$79 pp

Big mountain skiing and riding at small town prices.

- 2 major winter resorts within 8 miles of each other. Ski, hike, bike, golf and enjoy the great outdoors at Windham, Hunter and other mountaintop retreats.
- Less than one tank of gas roundtrip from NYC, NJ, CT and Mass. And just over 4 hours from Philadelphia and Long Island, NY.
- 1600 feet of vertical drop and over 240 acres of coronary summit cruizers, smooth intermediate trails and some of the steepest trails in the East.
- Don't ski or ride? How about ice skating, snowtubing, snowmobiling, snowshoeing, horseback riding, rock climbing wall and bungee trampolines?

Greene County – your vacation destination in every season



Ski – Lodging Winter 2010-2011



Greene County
new york
I LOVE NY

Golfing

From resort-style golf to championship play, Greene County's award-winning golf courses offer something for everyone. The Great Northern Catskill Mountains set the stage for a great game of golf at the area's nine public courses, which feature challenging terrain similar to the Scottish Highlands where the game began. With legendary layouts, first-rate golf pros to sharpen your skills and resort accommodations to relax in style, Greene County offers an exceptional Hudson Valley golf experience in an easy-to-reach location.

Play & Stay Packages

- Check out great deals on other Greene County hotel packages.
- Big Van Music Getaway
- Click here to see Van Week!

Golf Play & Stay
Package includes 18 holes with cart, Dinning/Entertainment with dinner & breakfast
From \$125pp

Day Deal
Includes 18 holes w/ cart & lunch
From \$40pp

45, 54 or 72 holes!
Package includes 45 holes weekdays, 54 or 72 holes weekends, lodging, meals and more!
From \$122pp

Blackhead Mountain Lodge & Country Club
Crows Nest Road
Round Top, NY 12472
518-622-3157
<http://www.blackheadmt.com/>
18 hole par 72 championship course, very challenging, sand, water, 2-6er greens, pro shop, carts, club rentals, restaurant, bar. Open to the public. "Blackhead Golf Academy" Golf pro lodging.

Catskill Golf Club
27 Brooks Lane
Catskill, NY 12414
518-943-7199
<http://www.catskillgolfclub.com/>
18 Hole, par 72, 6362 yards. Home of the Catskill Pro-Am. Walking and riding carts, club shop, restaurant, walkers welcome. Beautiful countryside atmosphere.

Christman's Windham House Country Inn and Golf Resort
5742 Rte 23
Windham, NY 12495
518-734-4230
<http://www.winhillambouse.com/>
7100 yard mountain course plus 9 hole valley course. Largest practice facility in NYS. Ran rentals, sand and multiple greens. Ben Sulton Golf School. Professional club fitting and repair and Play packages.

Golf - 2010



Greene County
new york
I LOVE NY

New York's Best All-Inclusive Packages Family Vacation Fun in the Great Northern Catskill Mountains

Greene County mixes the best all-inclusive family vacations with action-packed fun adventures for the perfect New York family vacation packages.

Just over 2 hours north of New York City and nestled between the Northern Catskill Mountains and the beautiful Hudson River, Greene County is a great family vacation destination offering families an easy escape from day-to-day pressures and vacation fun for everyone from toddlers to teens.

You'll find a variety of fun family resort options in Greene County. With the majestic Northern Catskill Mountains as a backdrop, it's easy to find the vacation destination that fits your family's needs. Choose from:

- Family-oriented resorts
- Full-service hotels & motels
- Vacation condos
- Catskill Mountain campgrounds

All Inclusive Family Resorts
Offering three hearty meals a day, with children's counselors and social directors to keep the kids busy while parents can relax, the all-inclusive resorts are the perfect family vacation. The entire family will enjoy swimming, boating, bocce, shuffleboard and other fun and games. Mom and Dad can play a round of golf or kick back for an evening cocktail party, dancing and other entertainment.

Fun Family Vacation Destinations
No matter what your interests, the best family vacations are located in Greene County, close enough that you can return again and again for a fun family getaway and there will still be more to see and do.

All-Inclusive Family Resorts
All Meals Included plus plenty of fun for all!
Find your favorite

Bring the Kids itinerary
A Day with the Kids

Play & Stay Packages
Check out great deals on Greene County hotel packages

Family Fun
Attractions for families and kids to have fun. Animals, mini-golf, movie theaters and more...

Family - 2010

Cooperative Advertising (example)

Reach Thousands of Families with Each Co-Op Buy



Take advantage of co-op opportunities with Greene County Tourism's Family Resorts Campaign and stretch your advertising dollars!

E-blasts will begin May 1, 2010. Deadline for reservations is April 12. Reserve your spots soon to get the best placement. Payment is due with space reservations. Participants may supply their own art to our specifications, or provide copy so your ad can be designed.

Dedicated E-News Co-Op Opportunities: wejustgotback.com nymagazine.com

- Water E-blast
- Critter E-Blast
- Golf E-Blast

(your choice of ad preference)

Single Spot Ad Space
\$650 each
Double Spot Ad Space
\$1200
Triple Spot Ad Space
\$1800

Single Spot Ad Space
\$650 each
Double Spot Ad Space
\$1200
Triple Spot Ad Space
\$1800

Deadline for reservations is April 12.

(reservation form included)

Billboards



Visitor Center (Thruway Exit 21)



2010 Tourism Visitor Center Renovation

New roof, new awnings, new signs, new sidewalk, new doors, new entranceway pergola, new landscaping) Visitation this summer has tripled since the renovation project.