

Clinton County 2010 Preliminary Destination Assessment

Clinton County is a complex destination – not one that is easy to get a handle on. History and proximity to Montreal, the Adirondacks, and Lake Champlain have all shaped the current reality.

Probably the most important thing to say, looking at this economy is that one sees change underway – and that change needs steering – fast!

There are many opportunities (to be explored further in Analysis) that are begging for attention – some that won't wait long. And many realities that can be explained, but must be adjusted as this economy changes directions, rebalances clientele, redefines its strengths, and zeros in on a new identity.

It is important to note that, as one drives through Clinton County neighborhoods, there is clear evidence of widespread interest in outdoor activities. Boat trailers, kayak racks, mountain bike carriers, and fishing gear are commonly found – clear indications of a population that is embracing the outdoors.

This relationship with the outdoors, coupled with new opportunities in choosing both patrons and reasons for travel, may very well define where Clinton County chooses to go in tourism.

Note:

This assessment is a set of living documents. Fresh eyes see from new perspectives, but they don't always catch all details, balances, or nuances right away. As more information comes to the discussion specifics may change and, almost certainly, balances will change. Further updates should be anticipated.

Snapshot of Current Clinton County as a Destination

September 2010

The following is a synopsis of the key elements of Clinton County – as a destination. It is not meant to be exhaustive – but to zero in on those things that are important to the way the destination functions now and could function in the future.

Destination Infrastructure, Products, and Experiences

(Includes notes on quality)

There are about 750 “current and competitive” lodging rooms in Clinton County. Most of those rooms are clustered around the intersection of Route 3 and the Northway. Most are middle to low range business and/or family style rooms positioned for convenience rather than view.

There are another set of rooms that are not “current and competitive”, mostly in the form of vintage motor lodges situated up and down the Adirondack Coast and along old tourism routes into the Adirondacks. Those stand in various states of repair and are priced lower than the rooms referenced above.

There is a lack of “current and competitive” lodging with a view!

There are a number of restaurants ready to serve both locals and visitors. The biggest concentration of those is near the same Route 3/Northway intersection. A strong percentage of those are family-oriented national or regional chain restaurants. There are non-chain restaurants as well, ranging from inexpensive to lower high-end.

In Plattsburgh, there is a second cluster of restaurants in the downtown area. Most of those are locally owned and reflect a range of quality/pricing. As one moves beyond Plattsburgh the choice shrinks. There are some restaurants associated with marinas, again varying in quality.

There is a shortage of fine dining with a view.

There are a number of marinas up and down Clinton County’s Lake Champlain shoreline. Most of the marinas look to be in good physical condition – and, from outward appearances, most are operated in a quality manner. Most of those marinas are close to capacity with seasonal slip rentals. A few marinas focus on serving local clientele – and appear to be lower in price. There are very few boats for rent (power or sail).

There are many places up and down the Adirondack Coast where one can launch. Public ramps are available for boats on trailers (or smaller boats on car top racks). There are elaborate hydraulic lifts to lower bigger boats at several of the marinas. These appear to be very professionally operated – and some of the operators were observed to be bilingual.

There are also a great number of “put ins” for paddle sports and power boating on regional rivers and lakes. Some of those are clearly best for local use, while others offer visitors great experiences.

There are two significant “natural attractions” in Clinton County. Clinton County includes the northeast edge of the Adirondack Park, where the Adirondacks meet Lake Champlain.

Lake Champlain is a base for a wide set of destination experiences including sailing, power boating, paddling, jet skiing, fishing, scenic tour boat rides, shoreline drives, ferry rides, train-based experiences, shoreline cycling, searching for “Champ”, and lake view dining. Visitors will find they have to leave Clinton County to achieve some of those experiences.

Clinton County has a key relationship with the Adirondacks. While most of the iconic Adirondack products and experiences are beyond county borders, Clinton County has provided a key corridor for Montreal residents to access these exciting mountains, lakes, rivers, and forest. It is important to note that a number of Canadians have cabins on the shores of small lakes and ponds in southwestern Clinton County. The Adirondack Park hosts exciting opportunities for downhill and cross country skiing, all kinds of boating (but particularly paddling), fishing (stream and lake), camping, hiking, climbing, cycling, and scenic drives. There is one significant “built attraction” which Clinton County shares with Essex County, the Ausable Chasm. The Chasm has a network of trails and bridges along a very exciting section of the Ausable River. There has been significant new work at the Chasm in recent times, repairing damage from earlier flooding, and upgrading infrastructure. Rafting and tubing are now facilitated. The company has added guided tours to the set of visitor experience options.

Clinton County has a great set of public highways – and it is connected by great highways and reasonable routes to a great number of potential visitors. The county abuts the Canadian border and is fond of calling itself Montreal’s US Suburb – a reflection on how easy it is for members of the “larger Montreal community” to move back and forth across the border.

There are frequent and easily accessible ferries crossing Lake Champlain at the center and southern ends of Clinton County’s Champlain coastline, and a driving route at the north end, making easy access to and from Vermont for both locals and visitors. Out-of-region visitors will find the ferries an exciting part of the visitor experience.

Amtrak runs from Montreal to Albany, weaving a slow route along the Adirondack Coast's Champlain shoreline. Inconsistencies in times and slowness may preclude this from being a significant way to "get to" the Adirondack Coast – but it has great potential as a scenic rail ride component of a greater visitor experience.

Plattsburgh has a new airport, which currently has commercial flight connections through Allegiant Air and Direct Air to Florida and through US Airways to Boston (with further links to the world). Volume has already exceeded the physical capacity of both the terminal and parking areas. An expansion is in the offing. More carriers and more flights are anticipated.

This infrastructure is a "game changer" for the Adirondack Coast – it changes who can be invited, how they arrive and depart, and when they fit into seasons and weekly visitor patterns. The airport and commercial flight combination dictates a "rethinking" of what the Adirondack Coast has to offer, how local visitor products are "valued", and "who" are the region's "best potential customers".

In many ways, history itself is an important part of the Adirondack Coast tourism infrastructure. The unique combination of geography supported a rather advanced Native American culture before Western invasion and settlement. The events that played out in and around Clinton County relative to struggles between white and red, France and England, the independence of the United States, and the Civil War shaped the way this nation developed and its self image. And, just as importantly, streams cascading toward Lake Champlain became the focus of water power and the birth of the American Industrial Revolution. While important sites can be visited, events are held, and museums are under development to celebrate history, many actions need to be taken to make the region's history sing for visitors.

The infrastructure for cycling as a destination experience is rapidly coming together. The routes for road biking are now captured in a map available to visitors. There are both private and public places to test yourself mountain biking. There are businesses ready to rent and sell quality equipment. There are events open to cyclists. And, there is a growing local participation in cycling which adds credibility to the destination.

The infrastructure for paddling is also coming together, both for the destination and from the destination. Kayak and canoe rentals and sales are available. The gear is in place to put rental kayakers on top of visitors' or rental cars. Both instruction and guided outings are available. Work needs to be done to outline paddling options in a manner that entices visitors to explore. There are great paddles in rivers and on several smaller lakes in Clinton County. There are also great paddles (some more challenging) on Lake Champlain with launch sites in the county, south of the county, and from the Vermont side (ferry or drive access). Paddlers waking in Clinton County lodgings are an easy drive from the iconic waters of the Adirondack high country.

The Airborne Speedway has made great strides in establishing regular races that are well attended. They are beginning to attract attention from the bigger players in industry. When out of region contenders come in they do have an impact on the weekend's lodging.

The infrastructure for wine tourism is beginning to come together in Clinton County – and can certainly be delivered from a Clinton County base. Several small wineries are coming online with local wines, in limited quantities. Work needs to be done to zero in on wines that can excel in this region and then tie the region's identity to those wines. More vines need to be planted to reach critical mass – and tasting rooms, curb appeal needs work.

Clinton County has a world class apple growing industry. Many of the orchards are set up to interface the public (both locals and travelers) for direct sales of apples, other farm products, and prepared foods and treats based on apples. These now play a great supporting role in the destination and have the potential to play a larger role. Apple cider needs to fit into this. And maple sugar needs to be woven in.

Gaps

The most glaring gap in the Adirondack Coast destination is the lack of quality lodging and dining oriented to the water. This will need to be corrected for the destination to succeed.

The new Plattsburgh airport was built to enable people from greater Montreal (both sides of the border) to fly out. The infrastructure is not in place for arriving visitors. There is a need for lodging and dining close by the airport. Also needed are more rental car companies and shuttles.

There is a need to identify corridors that connect the airport to other parts of the visitor experience/infrastructure that present well (take people through attractive parts of the destination).

Further, in Plattsburgh, there is a need to develop the zone from downtown to the train station to the waterfront in a way that is approachable by visitors – and friendly (and inviting) to those without a vehicle (coming off a train or boat). This zone also needs a strong attraction to focus visitors (not an outlet store, rather something of the caliber and focus of the waterfront museum in Burlington).

There is quite a bit of diversity in the dining within Plattsburgh – but there seems to be a general lack of dining that reflects the region. One does not (with some exceptions) find menus stressing Adirondack-grown meats or produce. There is a shortage of items from local apples, maple syrup, or other “heritage” foods. Destination-related dining is part of a destination identity.

While the Adirondacks have a rich heritage of crafts, most of which are directly related to the Adirondacks themselves, not much of that is readily visible on the Adirondack Coast.

There is a strong need for hospitality training, which is shared with the rest of the North Country.

Seasons

There is a general lack of statistical data, so the following conclusions are based on studying existing data and discussions with lodging, dining, marina, and other sources. Please read the section on patron groups for more details on each group.

- The “Canadian Shoppers” flow of visitors seems to be year-round, with predictable bulges as school starts and Christmas approaches.
- “Canadians with boats at Marinas” predictably show up when the weather turns nice in the early summer. Surprisingly, most of that ends rather quickly after Labor Day, even though there are many good boating days left on Lake Champlain.
- There is a steady year-round flow of business travel to the region, which has become the backbone to the viability of the hotels clustered around the Route 3/Northway intersection. There have been significant boosts in occupancy as specific projects (such as the wind power installation) have “stationed” employees in the region.
- The traditional drive market sends visitors into the region in predictable seasons, including summer vacation for schools and for fall colors.
- Fishing tournaments create short term bulges in occupancy.
- The beginning and end of college sessions are associated with occupancy boosts.

Rates and Demand

It is difficult, looking at the past few years, to really understand rates.

In Plattsburgh, where most of the data is from, the industry has managed to steadily grow room rates at a time when other destinations are retreating. Most of that, as noted above, has been the steady flow of business travelers.

Occupancy hits a very nice maximum in July and August with a mix of travelers. There was a significant bulge during the construction of the wind farm, which complicates one's ability to understand demand.

One can say that with fluctuations in room supply (Comfort Inn removed from room count, Microtel and Hampton added in) that basic demand has grown with the overall expansion of rooms – enough so that rates have not been impacted by the room count.

Hopefully, in the future there will be mechanisms to capture a better image that ties demand to patron groups to calendar (both weekly and seasonal patterns need to be understood).

While the destination is not “event-focused” like nearby Lake Placid, events do play a significant role in driving patronage of hospitality-related business and spinoff other economic benefits to the region. Fishing tournaments, cycling events, and weekend events at the speedway all contribute.

Competitiveness

Not enough is understood about how this destination stacks up against competition, especially with so many current and potential patron groups (see below). There are some common sense interpretations of existing data and patterns:

- Canadian Shoppers divide between Plattsburgh and Burlington based on the quality of merchandise they seek.
- Canadians are willing to cross the border for moorage of large boats, because Lake Champlain is better suited to recreation than the St. Lawrence Seaway – and because moorage rates are more reasonable.
- Canadians are eager to cross the border to fly out of Plattsburgh because there is considerable savings on flight costs. The easier border crossing, free parking and reasonable room rates in Plattsburgh may also help in that equation.
- Studies indicate that potential patrons in the drive market view the Adirondacks as a “tired” destination, which has lodging and dining options that are a poor match for those in competing destinations. They do consider the Adirondacks a “good value”.
- The population of this region is generally welcoming of outsiders, which puts them above some regional and many national destinations. The exception to that is a bias against French Canadians – currently the biggest set of patrons in Clinton County.

- Vermont (a smaller state than New York) markets Lake Champlain hard – and has for years. New York has not historically pushed Lake Champlain from the state level (they have so many things to push) and the state, at this point, is not a dependable marketing partner for economic reasons. The result is that many within that drive market think one goes to Vermont to experience Lake Champlain. Tourism infrastructure and patterns (which have evolved in that environment) reinforce that assumption, making it a self-fulfilling prophecy.

Positive and Negative Impacts

Often, in an economy that serves visitors, there is a gap in understanding of the benefits that come with those arrivals. That certainly seems to be the case in Clinton County, especially relative to French Canadians.

Positive Impacts and Benefits

- The airport – would simply not be there without Canadian fliers.
- The great selection of dining – the region’s population is not large enough to support the number and diversity of restaurants that locals enjoy.
- Similarly, the population within Clinton County does not justify the retail opportunities that are enjoyed by residents - visitors are also patronizing those businesses, making them feasible.
- Current tourism patterns create a number of jobs in the local economy
 - Most are “service” jobs
 - Many are seasonal
- Expenditures by visitors are taxed and that contributes revenue that helps deliver basic services to residents.

Negative Impacts

- Visitor patterns have contributed to the development of the new lodging/dining/retail hub at the intersection of Route 3 and the Northway. That development has pulled energy out of downtown.
- Sometimes there are enough visitors that it seems crowded.
- Past tourism patterns have resulted in a great deal of waterfront property taken up with cabins and second homes owned by people outside Clinton County. This tends to reduce options as the community looks toward the future.
- Tourism’s seasonality yields jobs and other benefits that are temporary.

Patron Groups

The following groups of patrons are, or could be, included in Clinton County's destination patronage list. It's important to understand how each interfaces the hospitality industry and the greater Clinton County economy. It's also important to understand the positive and negative social impacts associated with each visitor group.

There is good data on the spending patterns of Canadians that cross the border to shop. One should note that the region does not have a history of collecting detailed demographic data on tourism. The conclusions below were drawn from a combination of direct observations, interviews with shoppers, interviews with merchants, and existing data.

Canadian Shoppers

This group of patrons crosses the border to engage in retail shopping in Clinton County.

The selection of Canadians participating in this activity are a direct reflection of the retail opportunities in Clinton County. Clinton County tends to have more mid and lower end retail offerings than nearby Burlington, Vermont – and those offerings “divide” the traffic.

Longer stays enable Canadians to take more back across the border – but cost them lodging and dining expenses. There is a fair amount of “cheating” – as labels are peeled off new items and purchases are either not declared or presented as existing property.

Spending beyond retail appears to be directly correlated to retail expenditures (Clinton attracts lower budget retail shoppers), in lodging, dining, and experiences.

It is difficult to classify these visitors as “tourists”. They travel less than 100 miles from home to a destination that is noted as Montreal's southern suburb. They travel with the intent to shop – and not for “attributes of the destination”. The length of their stay is dictated by shopping rather than embracing destination experiences. In many ways it is easier to understand these patrons if we think of them as business travelers, intent on a mission, but still interfacing the Clinton County hospitality industry.

One important note is that this “flow of patrons” is dependent upon a strong Canadian dollar and a weaker United States dollar. When that situation reverses, the bargains are on the other side of the border. Not only does the “flow” shrink dramatically, but US patrons of Clinton County retailers are “drawn” across the border toward the bargains. In such a situation, Clinton County retail and hospitality industries suffer.

This group of patrons comes year round, driven by retail needs and, perhaps, responding to retail sales events. Patronage swells on weekends, especially when related to lodging and dining. Much of this traffic involves day trips. There are even a significant number of motorcoach day trips across the border, specifically for shopping.

The presence of Canadians shopping, dining, and overnighing has underwritten development of retail, and to a lesser extent lodging and dining. That was certainly underlined when 32 motorcoaches full of shoppers came to Target's grand opening – clearly showing the importance to business and the fact that Target invested in courting them.

Canadians with boats moored at Lake Champlain marinas

One cannot drive along the Adirondack Coast without seeing marina after marina filled with expensive sailboats and power boats. Marina management reports that better than 90% of those boats are owned by Canadians.

There seems to be a pattern that starts with the boat owners coming across the border, stocking up on groceries and supplies, moving those supplies onto their boats, and spending one to several days on the lake.

The boat owners interface the Clinton County economy through mooring contracts at the marinas and by purchasing fuel, groceries, and supplies. There are some purchases of meals at marinas, but most marinas regard that as a relatively small part of the economics of serving these visitors.

In contrast, there is a fair volume of these boats that pull up for temporary mooring at Burlington, Vermont. Restaurants there report a lively business. Those interviewed reported having French speaking staff – while that was an exception in the restaurants close to Clinton County marinas.

The owners of these boats are not a good economic match for the typical Clinton County retail. They are better matched to retail in Burlington – and high end merchants reported as much as 50% of their sales going to Canadians.

In many ways, these high end boats are a tourism equivalent to motor homes. There is a lot of money invested in each. But, their presence is not an indicator that these affluent people are leaving much in the local economy outside the marinas.

There is opportunity here.

Canadians flying out of the Plattsburgh Airport

Plattsburgh has commercial flights from its airport because Canadians patronize them. Without that patronage, there simply would not be commercial flight options from Plattsburgh. Residents should celebrate the opportunity they have from being Montreal's southern suburb.

All indications are that the new airport and commercial flights are a bigger success than anticipated. The success of this airport has happened much more quickly than anticipated! The combination of flights and passengers has already outgrown the terminal and parking area – and will need to be expanded. When that capacity is expanded Plattsburgh should anticipate more carriers and more flight options.

Oftentimes, it is easier to connect to those flights by having a room at a local lodging establishment before and/or after a trip. That implies meals as well. That is all good for the local hospitality industry.

As the number of flights is expanded and the popularity of flying from Plattsburgh increases, the spinoff business for the hospitality industry should also grow.

Business Travelers

While the region does not have a wealth of statistics, it is clear (from interviews with hoteliers) that the success of the “current and competitive” lodging establishments has come from serving business travelers. The cluster of newer lodging establishments around the intersection of Highway 3 and the Northway is a clear response by an industry setting up to serve the business traveler.

Research shows that occupancy figures are “underwritten” by business travel. In fact, when workers were installing the wind farm in 2009, there is a substantial springtime bulge in occupancy that was a windfall for the industry. Such events complicate the ability to understand the flow of leisure travel.

Business travelers present a mix when they engage the hospitality industry. Some patronize Plattsburgh's best restaurants while others stick to national chains and still others focus on fast food. Some focus on pubs and sports bars, while others use their leisure time out of doors. Cumberland 12 reports few business travelers watching movies.

There is every reason to expect that, as the Adirondack Coast's business community grows, that business travel will grow along with it.

Traditional Drive market

The long-time assumption in marketing Adirondack and North Country leisure travel is that the region is within a long day's drive for 100 million people – and marketing energies and budgets have focused on source cities within that long day's drive. That marketing approach targets a geographic area and simply invites everyone in that area to explore the tourism options in the area being marketed.

The fact that tourism infrastructure in the Adirondacks and the North Country has not evolved as rapidly as other competing destinations has left the region with a “tired” image. There has also been a tendency for the economic status of the average drive market visitor to slip over the years.

Clinton County has only recently put together a lodging tax and with it generated the ability to market to destination travelers. There has, however, been a general Adirondack/North Country/Lake Champlain set of websites, public relations efforts, and marketing efforts that have been directed at this market over prior years.

The drive market is clearly alive in Clinton County – what is unclear is how strong it is. This market is probably the backbone of the smaller, older lodging establishments. It surely contributes to the annual July/August uptick in occupancy and patronage of dining, retail, and experience-based tourism products.

Motorcoach Travel

The Adirondacks, North Country, and nearby New England have long had a love-hate relationship with motorcoach travel. Motorcoaches bring significant groups of people, but they also negotiate low rates for lodging and dining and hurry their people along on a rigorous schedule. If you are counting heads, they are great – if you are looking to increase spending per arrival, they work against you.

Clinton County has an interesting relationship with motorcoaches. They are definitely important to business at the Ausable Chasm. They bring batches of visitors to dine in Plattsburgh, mostly at the Ponderosa. They bring groups of shoppers across the border. There is a low ratio of overnight stays when compared to those that pass into or through Clinton County.

Many of the motorcoach visits to the region are tied to fall colors – and involve seniors. Others are centered around the Olympic venues in Lake Placid (which does not encourage motorcoach visits). Fort Ticonderoga currently focuses hard on motorcoaches, as do several venues in the Lake George areas.

Motorcoaches have a difficult time taking United States citizens across into Canada (US citizens don't tend to have passports or be savvy about border crossings).

Clearly motorcoaches provide some much needed revenues – and should be looked at in that light.

Route-based Fly markets

Commercial flights in and out of Plattsburgh are a new thing – and there has not yet been enough of a concerted marketing effort to “connected” cities to measure results. However, it is clear that there are some opportunities related to Plattsburgh's new travel connections.

Allegiant Air currently connects Plattsburgh directly with the Florida Cities of Fort Lauderdale, Orlando, and Tampa Bay. These cities are hot and steamy when the Adirondack Coast is at its best. They hold the potential, for several reasons, to strengthen the region's tourism performance at key times in the season.

US Airways connects Plattsburgh with Boston many times a week. A number of destinations (in the US and Europe) are one US Air flight away from Boston – and many more are easy connections. With US Airways' Star Alliance membership, the web extends to the planet!

While the opportunity is young and there is no “history” to this travel opportunity, there is great potential here.

Interest-based Markets

Regional tourism marketing, as noted above, has long focused on population centers within an easy day's drive.

As the internet has come of age and a wealth of interest-related publications has been spawned, many destinations are shifting marketing efforts to interest-based initiatives. One can compare the two approaches as shotgun (regional focus) and rifle (targeted interests).

Interest-based marketing is, further, more efficient – as everyone it reaches has some sort of interest in what is being said! And, in many cases, great strides can be made using public relations, without huge investment in advertising.

Further, whether interest-based marketing is pursued or ignored, publications and websites focusing on a particular set of interests are likely to give a related destination at least some attention.

It is probable that marinas along the Adirondack Coast already have interest-based marketing in place. They are probably connecting with key regional publications focusing on quality powerboats and sailboats. And they probably have secured relationships with boat dealers in Montreal.

Similarly, fishing contests are marketed to fishermen and women, through established channels of communications. Event organizers are able to reach those interested in fishing – but to zero in on interests based on the types of fish, the style of fishing, and the environments fishing takes place in.

And, when the focus is history, there are great publications dedicated to people who have strong interests in history – some even focused on specific periods and theatres of history. The same can be said for cycling (road and mountain), paddle sports, and other key Adirondack Coast visitor activities. Similarly there are interest-based travelers coming to the Adirondacks for winter activities including downhill and cross country skiing, snowmobiling, and ice fishing.

These markets have been approached by players in the region, but not by the region as a whole. It is clear that interest-based travelers are reaching Clinton County. Just look to the marinas and fishing contests to verify that. There is also a set of interest-based travel to nearby Lake Placid because of its association with the Olympics, Ironman, and other events. Some of this travel passes through Clinton County.

Interest-based travel is a marketing approach that bears serious consideration as the planning process moves forward.

Tourism Serving Community Needs

This planning process will explore how tourism can be used as a tool to help build an environment to support – or even directly contribute to – achieving community-designated wants and needs. This process will also pay close attention to addressing concerns the community might have related to tourism’s impacts.

In meetings across Clinton County, individuals and groups brought up the following:

- Retention of young people in the community after their educational years
- Careers and job opportunities, especially related to career paths, which will keep current young people from leaving the area and attract newcomers with families.
- Exposure to racial and cultural diversity and a diversity of ideas (the military base used to provide this and it is now gone)
- Tourism’s support for services and opportunities (basic and quality of life) that cannot be supported by the local population
- Spinoff opportunities for non-tourism businesses
- Improving the destination appeal also improves the region’s ability to attract new businesses and investment
- Using tourism to reinforce the organization and development of the arts community
- There is a strong drive to build a healthier, more physically active lifestyle in Clinton County – and the courtship of similarly focused visitors can be seen as a tool to support that.

There are indications of a rather unified community desire to become more vibrant (economically and socially), with an emphasis on building a stronger component of young professionals, including those who have roots in the region and those who choose to live on the Adirondack Coast because they appreciate the quality of life.

Visitors’ Perspective

Clinton County has diverse groups of visitors and the ratio among those groups is largely unknown, hard to predict, and historically difficult to manage. Understanding what each “sees” in Clinton County provides clues to how to better serve each patron group – and how to engineer economic and social gains.

The first three groups of visitors are not tourists by the accepted definition (going 100 miles from home and spending at least one night) but they are important to the destination economy.

Canadian shoppers see a quick and efficient run south to engage in retail. The cluster of retail offerings (mall stores, Walmart, Sam's Club, grocery, alcohol, and tobacco) is conveniently easy to access from the Northway. A wide range of dining is mixed in and lodging is available in a variety of price ranges. These visitors have a mindset that is very close to that of business travelers, focusing on a mission.

Canadians with moored boats see a good value in moorage on a lake that is great for boating. They see convenient opportunities to procure supplies (at favorable rates) after the border and before boarding their vessels. While local residents don't see them as "wanting" more than marina services, these travelers do seek, find, and engage in shopping and dining in Burlington.

Canadians flying out of Plattsburgh see an easy run south that saves many of the hassles of crossing into the United States by air. It is a relatively fast run down to the airport (maybe even faster than battling one's way to Trudeau) and the border crossing is much easier than the gauntlet of airport screening. There is convenient lodging for early flights, free parking, easy access to dining, and even the opportunity to stock up on retail items after flying back into Plattsburgh.

Business Travelers (also not true tourists) are focused on efficiently accessing hospitality services which enable them to focus on their business travel objectives. The cluster of traditional business lodging and national and regional chain dining serves them well. Some also patronize bars located close to lodging.

Those among the **Traditional Drive Market** find what they expected. The Adirondacks, North Country, and Lake Champlain regions have an identity established among those within driving range. They expect and find small lakes surrounded by cabins and second homes, small communities with limited dining and lodging, beautiful forest and rivers, great fishing, many boating opportunities, and reasonable prices.

Visitors arriving by plane (there are not many yet) will be surprised at the lack of hospitality infrastructure around the airport. They will find a welcoming community, a good mix of hospitality services, and exciting visitor experiences (both in Clinton County and from a Clinton County base camp or hub).

There are some **Visitors coming because of specific interests** now – and there will, no doubt, be more in the future. These visitors' views of Clinton County are a direct reflection of their interests:

- Those coming to fishing tournaments see an exciting lake to fish – one that draws in great competitors. They see the convenient and reasonable hospitality services that support their fishing. For some, that includes state park and private campgrounds.

- Those coming to races at Airborne Speedway find a clean and family oriented racing environment and reasonable lodging and dining.
- Those coming to explore the region’s history will find scores of important sites and a number of small, but interesting museums. The clustering of history-related museums in Plattsburgh could augment experiences for this group of patrons. They will also be excited about the history-related events in Clinton County and around Lake Champlain.
- Those coming to cycle or kayak will find great places to recreate, businesses to support, locals engaging in the same sports, and well matched hospitality services. They may find that some of the activities they wish to engage in are beyond the borders of Clinton County, but will also find that they can access many of those experiences from a Clinton County base (lodging, dining, and support businesses).

Demographics

Clinton County is a unique destination. While there are not great demographic statistics available, there are clues to what is going on. There is general information on Adirondack trends, spotty information on events (such as the installation of the wind farm) that cause spikes in occupancy, and anecdotal but reinforced information on Montreal overnighers.

We have tried to capture some basic trends that reflect presence in Clinton County below:

Weekly Trend

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Canadian Shoppers	Med	Med	Med	Med	High	High	High
Canadians with moored boats	Low	Low	Low	Low	High	High	High
Canadians on flights	Med	Med	Med	Med	High	High	High
Business Travelers	High	High	High	High	High	Low	Low
Traditional Drive Market	Low	Low	Low	Low	Med	Med	Med
Route Based Fly Markets	Low	Low	Low	Low	Low	Low	Low
Travel by Interest	Low	Low	Low	Low	Low	Low	Low

Seasonal Trend

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Canadian Shoppers	Med	Med	Med	Med	Med	Med						
Canadians with moored boats						Med	High	High				
Canadians on flights	Med	Med	Med	Med	Med	Med						
Business Travelers	Med	Med	Med	Med	Med	Med						
Traditional Drive Market						Med	Med	Med	Med			
Route Based Fly Markets												
Travel by Interest						Low	Low	Low	Low			

We expect ratios to be rapidly changing as Clinton County “finds its place” as a destination, targets and markets to visitors that fit local objectives, and develops more tourism infrastructure and services.

Destination Marketing/Planning/Leadership

Looking backward, one could almost say that the hospitality industry in Clinton County grew without a plan. Businesses responded to opportunity. Those that found clients survived and grew – those that didn’t (or those which lost when traffic was rerouted or tourism patterns changed) fell by the wayside.

Recently, the county implemented a lodging tax – and that lodging tax is directed towards tourism marketing through the chamber. The Chamber has assembled a talented marketing team – and they have built an advisory board that reflects both public and private interests in the sustainable and strategic growth and development of tourism.

This planning project is a direct reflection of those moves – and a clear set of intentions that Clinton County’s public and private leaders intend that tourism grow in a way that supports economic and social interests and can leverage broader social and economic goals.

This planning team has observed that there are diverse views at the table (a good thing) and that there is a sense that the greater public/private partnership necessary for a successful tourism economy is in the formative stages.

Synopsis of Current Destination Trends

While there are a great number of reasons for visitors to enjoy Clinton County through tourism, current patronage of hospitality businesses is dominated by business travelers and members of “Greater Montreal”. That has driven business development, both in terms of location and nature. Some of that business development reinforces Clinton County’s opportunities with those who travel further and seek the region’s strengths (Lake Champlain, Adirondacks, rural nature, etc.).

The new airport has swollen the existing pattern, but, coupled with the new lodging tax, presents a huge opportunity for Clinton County to define the future it wants and invest/market its way to that future.

New energies in the form of growing interests in road and off road cycling, paddle sports, and other outdoor activities imply the time is ripe for Clinton County to use tourism to support its own passions!