

INTRODUCTION AND EXECUTIVE SUMMARY

The Lake Champlain Ferries play a pivotal role for tourism planners and tourism service providers interested in regional tourism development in the Lake Champlain basin. The ferries offer the only east/west transportation link across Lake Champlain for nearly a 70 mile stretch between the bridge north of Alburg, VT south to the bridge at Crown Point, NY. These three ferries - one between Grand Isle VT and Plattsburgh NY, a second between Burlington VT and Port Kent NY, and a third between Charlotte VT and Essex NY - transport more than half a million people annually between the two states. In addition to transporting commuters and business travelers, the ferries are also an important part of the Lake Champlain region's tourism transportation infrastructure. There is no research, however, that documents the role of the Lake Champlain Ferries in tourism activity in the two-state region. This report, therefore, analyzes the role of the Lake Champlain Ferries in regional tourist travel by asking passengers about their experience on the ferries, trip destinations, overnight accommodations, travel information sources, trip activities, trip expenditures, and general travel interests.

The goals of this study were, in part, directed by the collaborative nature of the research funding. The project was initiated, and funding coordinated by Jim Kelly of Enabling Technologies, who produces the travel information radio broadcast at each of the Ferry landings. Jim's efforts were also supported by his advertisers, including tourist attractions and tourist related businesses in the area such as Shelburne Museum, Ft. Ticonderoga, the Lake Placid Olympic Center, the Olde England Inn, and the Christmas Loft. The project also relied heavily on cooperation from Dave Schermerhorn and the Lake Champlain ferries, who also contributed the labor for data collection at the Charlotte/Essex and Burlington/Port Kent crossings. Carolyn Harding and the Plattsburgh/North Country Chamber of Commerce contributed labor for data collection at the Grand Isle/Plattsburgh crossing. Her office also provided the French translation of the questionnaire that was offered to Quebec passengers on the Ferries. Tim Shea at the Visitors and Conventions Bureau of the Lake Champlain Regional Chamber of Commerce provided meeting space and conference calls during the process. His office also helped with data entry once the questionnaires were completed by passengers. Finally, Susan Fuller and the Vermont Department of Tourism and Marketing provided financial support for the project. In all, this study was a unique experiment at collaborative research funding that leveraged a substantial research product from minimal inputs from multiple players.

Given the multiple players in the project this study asked five broad questions. First, who uses the Lake Champlain Ferries? The study incorporated a random sample of Ferries passengers across the 1996 season from May through October (see the description of the methods in Appendix A). This sampling procedure generated a representative sample of all Ferries passengers during the year, that allowed us to draw conclusions about the "typical" Ferries passenger. Specifically, the questionnaire was designed to determine passenger experience on the Ferries, frequency of use, average group size and composition, evaluation of the Ferry's services, and purpose of the trip. The questionnaire also asked if people listened to the travel information radio broadcast at the landings, and if so, was the information helpful. The descriptive statistics from the data also enabled extrapolations to all Ferries

passengers. This allowed estimations of the number of passengers annually who were, for example, business travelers, commuters, or pleasure travelers.

A corollary to this first question about who uses the Ferries is a description of how Ferries passengers may differ at the three Ferry crossings. Do Grand Isle/Plattsburgh passengers differ from Charlotte/Essex or Burlington/Port Kent passengers? Similarly, do Burlington/Port Kent passengers differ from Grand Isle/Plattsburgh or Charlotte/Essex passengers? The analysis, therefore compared passengers and their travel activities at the three different Ferries crossings.

Second, the study asked how tourists in the region use the east/west transportation linkage provided by the Lake Champlain Ferries? The survey was therefore designed to understand how people travel through the Lake Champlain region. The questionnaire asked respondents about trip destination, sources of travel information used, overnight accommodations, travel activities, tourist attractions visited, trip expenditures, interest in forms of specialty travel, and the respondent's evaluation of the region's travel infrastructure and services. Overall, the study wanted to understand how the Lake Champlain Ferries facilitate tourist movement and activity in the Lake Champlain region.

Third, the project wanted to know to what extent local residents make day excursions of the Lake Champlain Ferries. Most regional estimates of travel activity and travel related economic impact limit the definition of tourism to travel that is 100 miles or more from one's primary destination (e.g., U. S. Travel Data Center and Simmons Market Research). This is an unrealistic of tourism, particularly in small states like Vermont, where short distance day trips may be common. Thus, this study wanted to find out the extent of these short distance travel excursions, where local residents of the Lake Champlain region may ride the Ferries to some tourist destinations on the other side of the Lake. More importantly, do those traveling on day excursions differ in significant ways from nonlocal travelers who may be on a multi-day vacation to the region? This study therefore analyzed this day excursion phenomenon in three ways. First it compared day travelers with overnight travelers to the region. Second, the analysis compared local residents with nonlocal residents of the Lake Champlain region. Third, the analysis looked at differences between Vermont residents and New York residents of the Lake Champlain region.

Fourth, how do business travelers using the Lake Champlain Ferries differ from tourists using the Ferries? Are they more frequent users of the Ferries? Do they use travel information differently? The analysis therefore compared responses between people traveling across the Ferries on business with responses from those traveling on the Ferries for pleasure.

Finally, do different tourist attractions in the Lake Champlain region cater to a differing clientele of visitors? Do heritage attractions draw a different visitor than factory tour attractions? Do natural resource based attractions draw a different clientele from the built attractions in the area? This study therefore looks at the visitor characteristics, travel information sources used, trip expenditures, travel activities, and travel interests of visitors to 16 tourist attractions in the Lake Champlain region. The analysis also compares the responses between visitors to the different attractions.

Major Findings

- ★ One-third of the Lake Champlain Ferries passengers (35.7%) are tourists on a multi-day vacation to the region. This means that the Ferries carry approximately 200,000 tourists across the Lake annually.
- ★ Most passengers (70.2%) used the Ferries for local travel, while 29.8% used the Ferries as a through link to destinations beyond the greater Lake Champlain Region. Therefore, Roughly 165,000 people annually use the Ferries as a through link to a more distant destination.
- ★ The majority of passengers on the Ferries are on one day trips (59.8%). Specifically, 14% are on one day shopping excursions, 11.1% are on one day business trips, 10% are traveling for personal business (medical appointments, airport or train station drop-off/pick-up), 10% are visiting general tourist attractions for the day, and 7% are pleasure driving. The remainder are commuters who primarily travel on the Grand Isle/Plattsburgh ferry.
- ★ The main travel destinations of Ferries passengers were Burlington (46.1%) and Plattsburgh (29.8%). The Ferries also service some trips to the Lake Placid/Saranac Lake region (10.9%) and to the Stowe/Waterbury/Mad River Valley area (7.6%).
- ★ The most popular tourist attractions visited by Lake Champlain Ferries passengers were Church Street Market Place (16.4%), followed by Ausable Chasm (15.0%), Shelburne Museum (14.6%), Lake Placid Olympic Center (14.5%), and Ben & Jerry's Ice Cream Factory (14.5%). Slightly less frequently visited attractions included Ft. Ticonderoga (10.1%), Vermont Teddy Bear Factory (9.0%), Santa's Workshop (8.9%), Lake Champlain Cruises (8.1%), and the Great Escape (7.6%).
- ★ The Lake Champlain Ferries serves primarily a local clientele. Over half the riders (54.3%) live in the Lake Champlain Valley, 9.3% come live in a New England state, 11.1% live in another Northeastern state like Pennsylvania, New Jersey, or New York, 4.3% come from Southern or Mid-Atlantic states, 2.7% from Midwestern states, and 1.9% come from Western States. Only 4.5% of the Ferries passengers were Canadian residents. More than half the Canadian residents were from Ontario.
- ★ Most people first learned of the Ferries by living in the area or through referrals from friends (76.8%). A small proportion (10.9%) first learned of the Ferries by looking at maps, and through Ferries brochures (4.4%).
- ★ Respondents have been riding the Ferries for an average of 17 years. One respondent first rode the Ferries in 1930. Only 10.1% of the sample first rode the Ferries prior to 1960. Well over half of the sample (60.6%) first rode the Ferries after 1976 when the Grand Isle/Plattsburgh Ferry began operating year round. Nearly a third of the sample (32.4%), however, first rode the Ferries in the 1990s. Further, 186 people sampled (17.9%) were first time riders of the ferries. This means that as many as 100,000 people who cross the Lake on the Ferries each year are first time passengers.

- ★ Because the sample consisted of 72.9% of Grand Isle/Plattsburgh Ferry passengers, respondents had been on this ferry more times in the past, and ride this ferry more frequently. Half the sample had never been on the Burlington/Port Kent Ferry (46.1%) or the Charlotte/Essex Ferry (55.6%).
- ★ The average group size of the sample was 2.42 people. Overall, 30.9 people crossed the Ferries alone, 37.6% crossed in 2 person parties, 11% crossed in 3 person groups, and 12.3% crossed in 4 person groups. Only 8.2% reported traveling in groups of 5 or more people.
- ★ Most of these people did not travel with children. More than three-fourths of the sample (77.2%) traveled on the Ferries without children. There were 9.7% who traveled with one child, 9% who traveled with 2 children, while only 4.3% traveled with 3 or more children.
- ★ Nearly 250,000 people (44.5%) noticed the signs at the Ferry landings advertising the travel information radio broadcast. More than 40,000 listened to the broadcast during the season (7.5%), and that more than 30,000 people found the information useful in trip planning.
- ★ People evaluated the Ferry's facilities and services very favorably, particularly employee courtesy, cleanliness of the boats, and cleanliness of the landings.
- ★ Passengers on the Ferries made most frequent use of the following information sources in planning their trip: highway maps (27.6%), word of mouth (18.8%), travel brochures (12.6%), regional travel guidebooks (9.7%), and AAA guides (8%). They made the least frequent use of 1-800 toll free information numbers (1.2%), travel oriented CD-Roms (1.5%), newspaper or magazine feature articles on the Lake Champlain region (1.9%), and travel agents (2.1%). Media advertising was used by 2.9% for television or radio advertising, and 5.7% for newspaper or magazine advertising.
- ★ Passengers on the Ferries made most frequent use of the following information sources while traveling in the region: highway maps (30.4%), friend's advice (12.2%), travel brochure stands (10.5%), local newspapers (7.3%), and gas station or retail attendants (6.6%). They made the least frequent use of kiosks (1.2%), welcome centers (2.9%), hotel desk clerks (3.3%), AAA guides (3.6%), regional travel guidebooks (4.5%), and chambers of commerce (4.8%).
- ★ The two most popular travel-related activities that Ferries passengers participated in were shopping (30.7%) and pleasure driving (25.1%). Hiking (14.2%) and visiting museum or historic sites (14.2%) were also popular activities. The least popular activity included factory tours (5.4%). Apparently people do not think of the Ben & Jerry's tour and the Vermont Teddy Bear Factory tour as a "factory tour." Other activities that were not as popular included visiting friends or family (5.6%), fishing or hunting (6.2%), and visiting night clubs or other night time entertainment (6.2%).

- ★ Passengers on the Lake Champlain Ferries expressed the most interest in watchable wildlife and heritage tourism as forms of specialty travel. They expressed the least interest in gambling, factory tours/industrial district tours, and agricultural tourism or visiting working farms.
- ★ Overall, Ferries passengers evaluated the quality of the regions tourism infrastructure and services very highly. They gave their highest ratings to the region's scenic overlook and local hospitality. They gave their lower ratings to the condition of the roads and the value for the money of the region's amenities.
- ★ The average age of the sample was 42 years old. Average household income was more than \$50,000 annually. Half the sample also had a college degree. These results show that the sample tended to be a well-educated group of baby boomers with household incomes above the national average.
- ★ Burlington/Port Kent passengers are more likely to be pleasure travelers, more likely to be a nonresident vacationers, and less likely to be business travelers or commuters than passengers on the other two ferries.
- ★ Grand Isle/Plattsburgh passengers used the Ferry for more utilitarian purposes than the other two crossings. They rode the Ferry more frequently, rode in smaller groups, evaluated the ferry services and the regions travel related services lower, spent less money, used information sources less frequently, and visited tourist attractions less frequently than passengers on the other two ferries.
- ★ The Charlotte/Essex passengers were generally more like the Grand Isle/Plattsburgh passengers. One notable difference, however, was they were a better educated group who generally evaluated the ferry services and tourist related services of the region higher. The landings at the Charlotte/Essex ferry are more out of the way and this crossing is arguably the more scenic crossing of the three. Therefore, the Charlotte/Essex passenger may be less utilitarian in choosing this crossing, and may be choosing this route because of leisure related motives.
- ★ Day users of the Ferries were more likely than overnight users of the Ferries to notice the signs advertising the travel information radio broadcast at the Ferry Landings. They were also more likely to listen to the radio broadcast. Similarly, local residents were more likely than nonlocal residents to see these signs and to tune to the radio broadcast.
- ★ Overnight visitors who used the Ferries were more likely than day users to use more travel information more frequently to plan their trip and during their trip. Similarly nonlocal residents of the Lake Champlain region were more likely than local residents to use more travel information to plan their trip and during the trip. The only exception was that local residents made more frequent use than nonlocal residents of media advertising (newspaper, television, and radio) to help plan their trip.

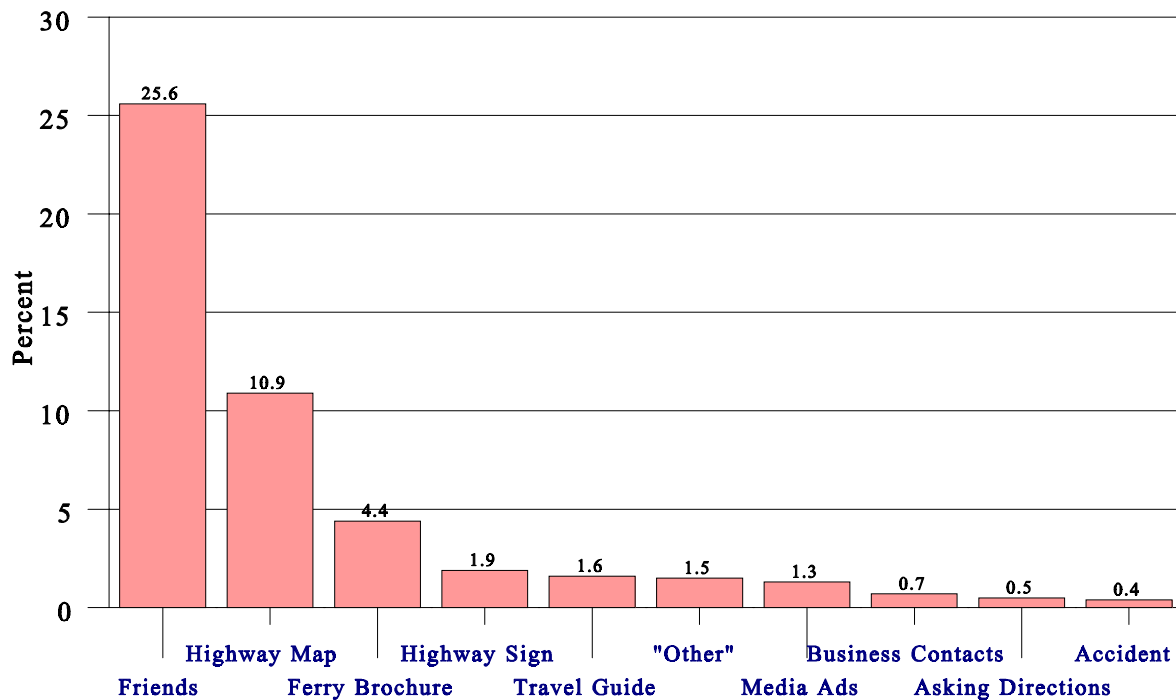
- ★ Overnight visitors who used the Ferries were more likely than day users to participate in leisure activities during their trip and to spend more money during their trip. Similarly, nonlocal residents of the Lake Champlain region were more likely than local residents to participate in more leisure activities and to spend more money during their trip.
- ★ Most day users of the Ferries listed either Burlington or Plattsburgh (88%) as their primary destination, while only 53% of the overnight users listed these two cities as the primary destination for their trip.
- ★ Day users of the Ferries expressed less interest in heritage tourism and watchable wildlife than overnight visitors. Day users also expressed more interest than overnight visitors in gambling.
- ★ Day users of the Ferries gave evaluated the quality of the roads and local hospitality lower than did overnight visitors. Conversely, overnight visitors had more trouble with the highway signs in the region. Similarly, local residents evaluated the quality of the roads, the local hospitality, and the availability of travel information lower than did nonlocal residents of the ferries.
- ★ New York residents of the Lake Champlain region ride the Grand Isle/Plattsburgh Ferry more often than Vermont residents of the Lake Champlain region. Vermont residents ride the Charlotte/Essex Ferry more frequently.
- ★ Vermont passengers on the Ferries were a slightly more critical group than New York passengers on the Ferries. Vermont residents of the Lake Champlain region rated the cleanliness of the Ferries, and the quality of food service lower than New York residents. They also rated the area's value for the money and variety of activities lower than New York residents.
- ★ New York residents make more frequent use of traditional travel information like travel brochures, regional travel guides, highway maps, and AAA guides than do Vermont residents.
- ★ Vermont passengers are more likely than New York passengers to participate in water-based outdoor activities and land-based outdoor activities. New York passengers are more likely than Vermont residents to participate in more traditional tourist activities like shopping, pleasure driving, craft events, and festivals.
- ★ Vermont passengers are less interested than New York passengers in forms of specialty travel that are featured in Vermont. They have less interest in heritage tourism, agricultural tourism, and factory tours than do New York passengers.
- ★ When comparing visitors to the region's tourist attractions, visitors to the Great Escape are a group unto themselves. They typically are local residents on day trips, who are younger, have less education and income, and who make infrequent use of travel information sources. They also participate in fewer other types of travel activities during their trip, and have little interest in specialty forms of travel.

- ★ Visitors to the small local history museums (Clinton County Museum, Kent de Lord House, and the Alice T. Miner Museum) generally cluster together in their responses, while visitors to the more prominent historical attractions (Shelburne Museum, Ft. Ticonderoga, and Crown Point) generally cluster together in their responses.
- ★ Four attractions (the Christmas Loft, Lake Champlain cruises, Church Street Market Place, and Santa's Workshop) generally attract a local clientele. These visitors therefore use information in roughly similar ways, participate in roughly the same activities during their trip, and spend approximately similar amounts of money during their trips.
- ★ The Vermont Teddy Bear Factory, Lake Placid Olympic Center, Ben & Jerry's, High Falls Gorge, and Ausable Chasm generally attract more nonlocal visitors to the region. Visitors to these attractions, consequently use information in similar ways, participate in similar activities during their trip, and spend approximately similar amounts of money during their travels.

CHAPTER 1 SURVEY RESULTS

Knowledge and Experience

How did you first learn of the Lake Champlain Ferries? The questionnaire included questions about respondent's knowledge of the Lake Champlain Ferries and questions about any previous experience respondents had riding any of the three Ferries. Over half the sample (51.2%) said they knew about the Ferries from living in the area. These people presumably could not specify exactly how they first learned of the Ferries. Beyond area residents who had always known of the Ferries, Figure 1 shows the remaining rank ordered ways that respondents had first heard of the Ferries. The most common way was through friends and family. One-fourth of the sample (25.6%) said they first learned about the Ferries from friends. Another 11% first found the Ferry crossings by looking at highway maps. The third most common way people found out about the Ferries (4.4%) was through Ferries brochures circulated throughout the region. The remaining ways that respondents first learned of the Lake Champlain Ferries were by highway directional signs (1.9%), regional travel guidebooks like AAA or the Vermont Traveler's Guidebook (1.6%), "other" ways such as going to college in the area or by riding a tour bus (1.4%), newspaper, magazine, television, or radio advertising (1.3%), business contacts (0.7%), asking for directions (0.5%), and by accident (0.4%).



These findings are, first of all, consistent with most other tourism marketing research showing the importance of "word-of-mouth" advertising in attracting new riders. Beyond people who live in the area, referrals from friends or family members were the most common way people found out about the Ferry crossings. The importance of highway maps also is consistent with past research we have done for the state (e.g., Kuentzel & Valliere, 1994) showing that maps are an important source of travel information. This finding confirms the need for the Ferries to maintain a high profile on tourist maps, highway maps, and other geographical presentations. Regional distribution of Ferries brochures does have a measurable impact on people and should continue to be an important part of the Ferry's marketing strategy. Finally, the results show media advertising (newspaper, magazine, radio, and television) are not primary ways people learn of the Ferries. This does not mean media advertising is not effective in reminding people of the Ferries and announcing seasonal openings. Nevertheless, media advertising does not appear to be the best way to attract new passengers.

Previous Experience Riding the Ferries. Respondents were next asked when they first rode any of the three Ferries, how many times they had been on each of the Ferries, and how frequently they rode these ferries. On average, respondents had been riding the Ferries for 17 years (mean = 1979, standard deviation = 14.81 years). One respondent first rode the Ferries in 1930. Only 10.1% of the sample first rode the Ferries prior to 1960. Well over half of the sample (60.6%) first rode the Ferries after 1976 when the Grand Isle/Plattsburgh Ferry began operating year round. Nearly a third of the sample (32.4%), however, first rode the Ferries in the 1990s. Further, 186 people sampled (17.9%) were first time riders of the ferries. This means that as many as 100,000 people who cross the Lake on the Ferries each year are first time passengers.

The study used two questions to gauge passengers experience riding the Ferries. 1) The questionnaire asked passengers to report how many times they had ever ridden any of the 3 Ferries. 2) They were

also asked how frequently they ride the 3 ferries (e.g., never, once every few years, once a month, once every few days, etc.). Figure 2 shows how many times respondents had previously been on each of the 3 Ferries. This figure confirms that the Grand Isle/Plattsburgh Ferry is the most frequently used crossing of the 3. Because of the sampling frame (72.9% of the sample was interviewed on the Grand Isle/Plattsburgh Ferry), only 17.5% of the sample had never been on the Grand Isle/Plattsburgh Ferry. Just under half (42.2%) of the 348 people sampled on either the Charlotte/Essex or Burlington/Port Kent Ferries had never ridden the Grand Isle/Plattsburgh Ferry in the past. Nevertheless, nearly one fourth of the full sample (23.7%) had ridden this ferry more than 100 times. Therefore, the convenience of this crossing attracts the more frequent Ferry user. This crossing currently receives about 70% of the total annual use among the 3 crossings in part because it is open year round, but also because it connects the two "metro" areas in the greater Champlain region - Burlington and Plattsburgh.

Figure 2 also shows that a majority of the full sample had never been on the Charlotte/Essex Ferry (55.7%), while just under half of the sample (46.2%) had never ridden the Burlington/Port Kent Ferry. The figure shows that only a fourth of the sample (24.4%) had been on the Charlotte/Essex Ferry five times or less, while over one third of the sample had ridden the Burlington/Port Kent Ferry five or fewer times. Conversely, more people (6.4%) had ridden the Charlotte Essex Ferry 50 or more time in the past, while only 2.6% of the sample had been on the Burlington/Port Kent Ferry 50 or more times. This comparison indicates that it is more difficult to attract riders to the Charlotte/Essex Ferry, yet there is a larger core of more frequent passengers than at the Burlington/Port Kent crossing.

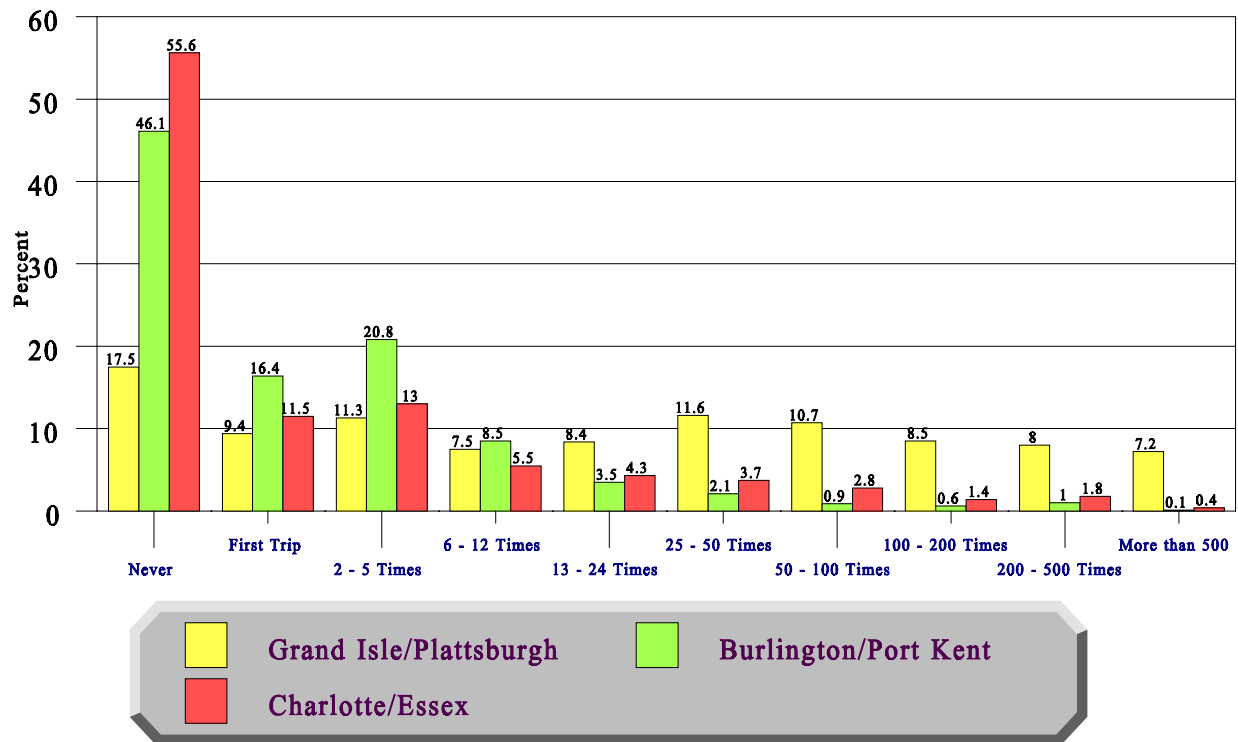
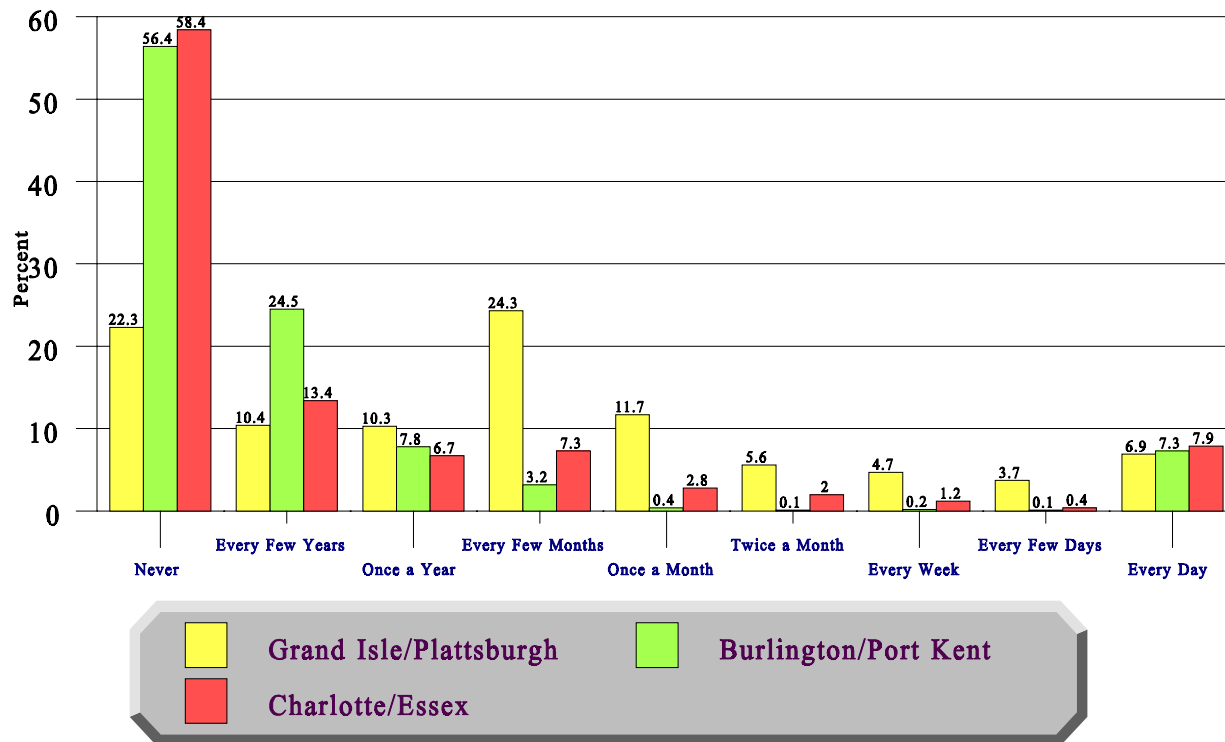


Figure 3 shows the frequency with which people ride the 3 Ferries. These results reflect the frequency of Ferry ridership. Passengers ride the Grand Isle/Plattsburgh Ferry far more frequently than the other two. Approximately the same number of people (roughly 7% to 8%) ride each of the Ferries on a daily basis, probably commuting to work. Far more respondents, however, ride the Grand Isle/Plattsburgh Ferry once every few days (3.7%), once a week (4.7%), once every two weeks (5.6%), once a month (11.6%), or once every few months (24.3%) than the other two ferries. Once again, this is partially due to the year round operation of the Grand Isle/Plattsburgh Ferry. Nevertheless, the frequency of ridership in each of these categories at the other two crossings is generally below about 3%. Figure 3 also shows that the sample generally crosses at the Burlington/Port Kent Ferry less frequently than the Charlotte/Essex passengers crossing.

Today's Trip on the Ferries

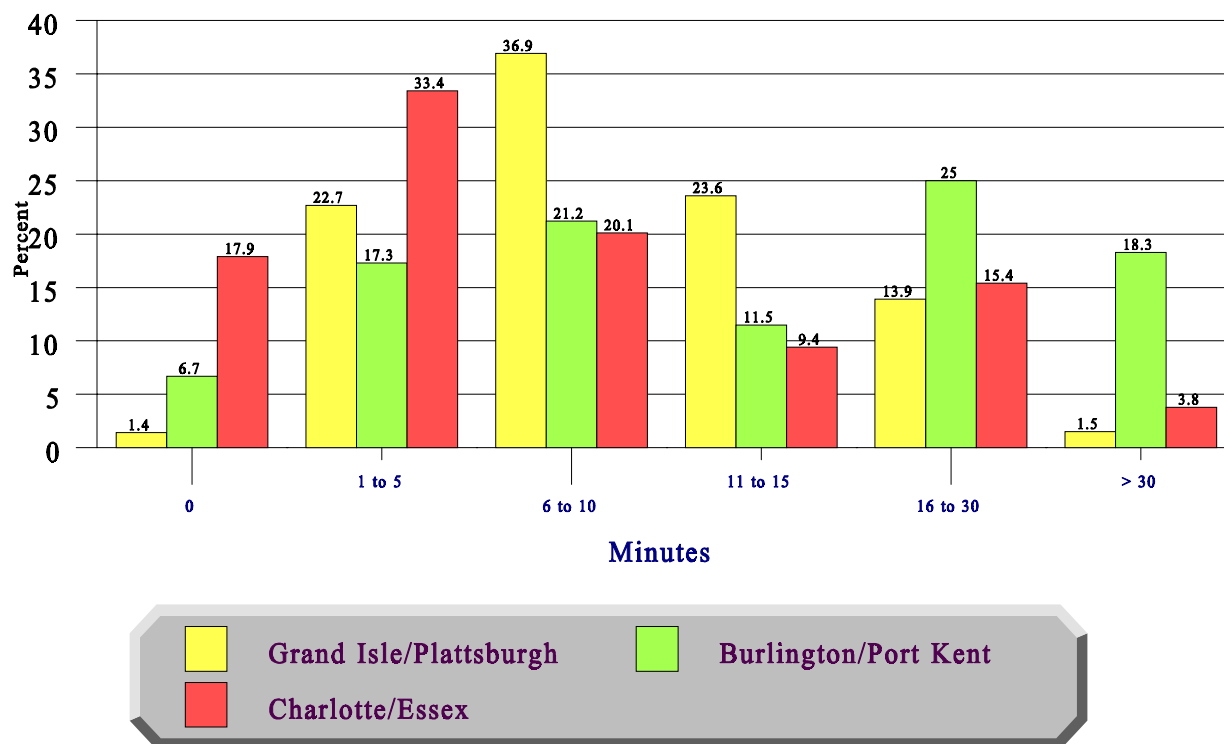
Respondents were asked a series of questions about their trip on the day in which they were interviewed. Specifically, the questionnaire asked 1) how long the passenger had to wait before boarding the boat, 2) group size and content, 3) whether they were traveling to a local destination or passing through to a more distant destination, 4) questions about the travel information radio broadcast at the landings, and 5) questions rating the facilities and services on the Ferries.



Wait Time at Ferry Landing. Wait time at the Ferry landing is obviously a function of how long each crossing takes. Grand Isle/Plattsburgh is the shortest taking 20 minutes to board, cross, and unload passengers. The Charlotte/Essex Ferry is slightly longer taking approximately 25 minutes, while the Burlington/Fort Kent crossing is the longest, running just over an hour. With two boats running at each crossing, passengers typically do not have to wait longer than these crossing times unless there are more people lined up at a crossing than can fit on the boat.

Figure 4 shows, as would be expected, that the wait at the Burlington crossing is the longest. On average, passengers at this ferry waited 20.5 minutes before boarding. Most people (81.7%) got on this boat in less than 30 minutes. Nevertheless, there were a larger proportion of people who had to wait longer than 30 minutes. The longest reported wait at the Burlington crossing was 90 minutes.

Contrary to expectations, the Charlotte/Essex Ferry crossing had the shortest average wait at the landing in spite of its slightly longer crossing time than the Grand Isle/Plattsburgh crossing. On average, Charlotte/Essex passengers waited 9.42 minutes while Grand Isle/Plattsburgh passengers waited 11.73 minutes. Figure 4 shows that more than half of the Charlotte/Essex passengers (51.3%) were boarded in 5 minutes or less. Even more notable is the 17.9% who said they did not have to wait to board the boat. At Plattsburgh, only one-fourth of the passengers (24.1%) were boarded in 5 minutes or less. This difference may be due to greater demand at Grand Isle/Plattsburgh causing some people to have to wait for an additional boat before boating. Indeed, the longest reported wait at the Grand Isle/Plattsburgh crossing was 75 minutes, while the longest wait at Charlotte Essex was 45 minutes.

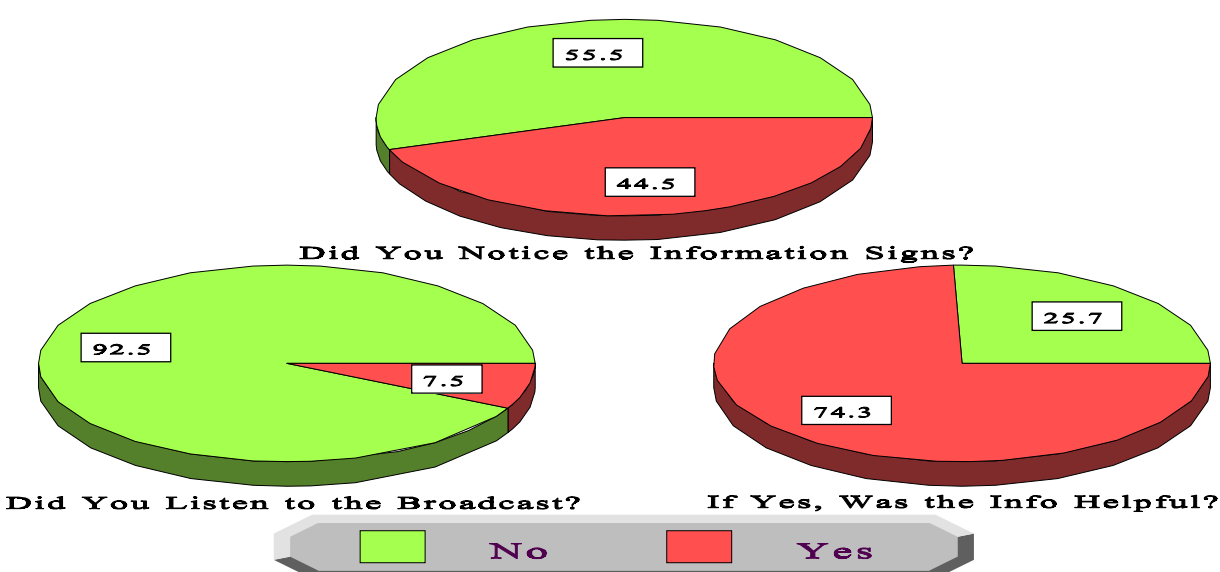


Group Size and Composition. The questionnaire asked respondents to report how many adults and how many children were traveling in their party on the day they were contacted. The average group size of the sample was 2.42 people. Overall, 30.9 people crossed the Ferries in single adult groups, 37.6% crossed in 2 person parties, 11% crossed in 3 person groups, and 12.3% crossed in 4 person groups. Only 8.2% reported traveling in groups of 5 or more people. As expected, most people travel as single adults or in two adult parties. More than a third of the sample (36.5%) traveled alone, while nearly half (45.7%) traveled with a second adult. Another 9.7% of the sample traveled in groups of 3 adults, 5.7% traveled with four adults, and the remaining 2.5% traveled in groups of 5 or more adults.

Most of these people did not travel with children. More than three-fourths of the sample (77.2%) traveled on the Ferries without children. There were 9.7% who traveled with one child, 9% who traveled with 2 children, 2.8% who traveled with three children, and 1.5% who traveled with 4 or more children. Just 5.6% of the sample included children accompanied by a single adult, while 11.9% of the sample included children accompanied by two adults.

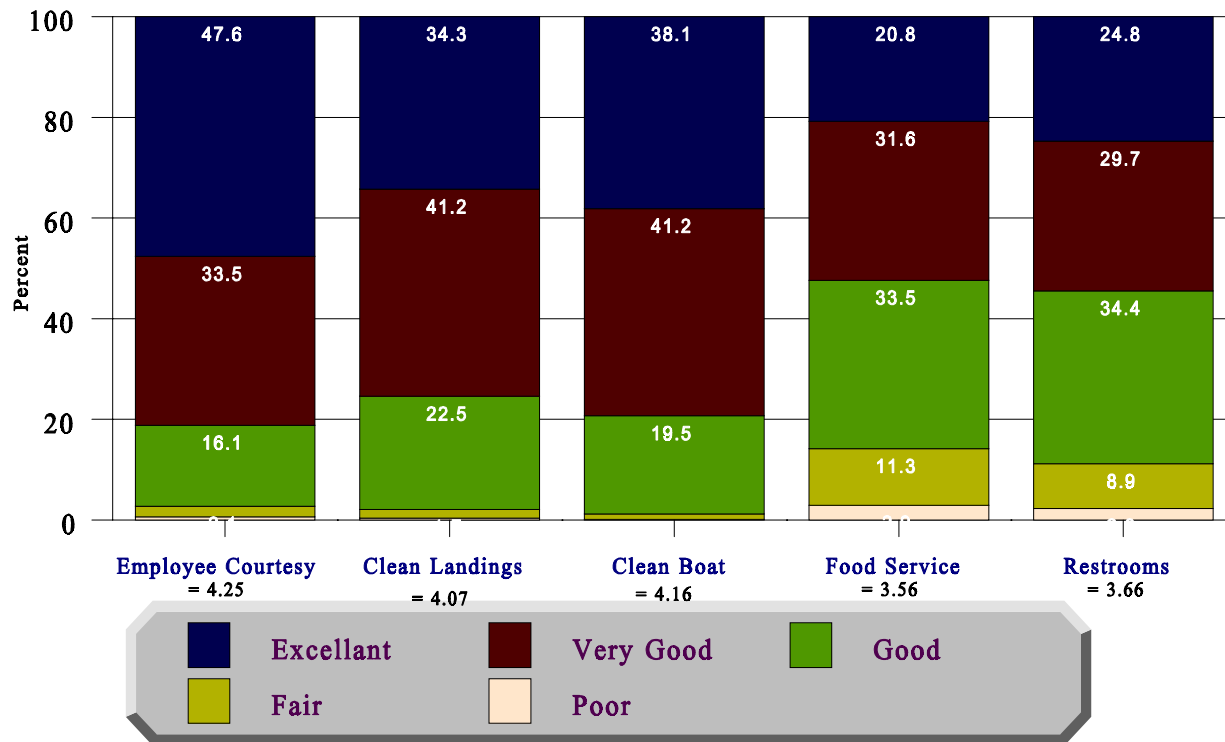
Destination. The questionnaire asked if respondents were traveling to a destination beyond either Vermont or the New York Adirondack region. The results showed that 70.2% used the Ferries in traveling to local destinations, while 29.8% used the Ferries as a through link to destinations beyond the greater Lake Champlain Region. This means that roughly 165,000 people annually use the Ferries as a through link to a more distant destination.

Travel Information Radio Broadcast at the Landings. The questionnaire asked if people noticed the travel information signs at the Ferry landings telling people to tune to information about tourism opportunities in the region. It then asked if passengers had listened to the radio broadcast, and if so, was the information helpful for one's trip planning. Figure 5 shows that just under half of the sample (44.5%) noticed the travel information signs at the Ferry landings. Just under 1 in 10 people (7.5%) tuned into the radio broadcast. Of those 85 people in the sample (7.5%) who listened to the radio broadcast, most (74.3%) said the information was helpful in planning their trip. When extrapolating these proportions to all Ferries passengers during the year, this means that nearly 250,000 people noticed the travel information signs, more than 40,000 listened to the broadcast during the season,



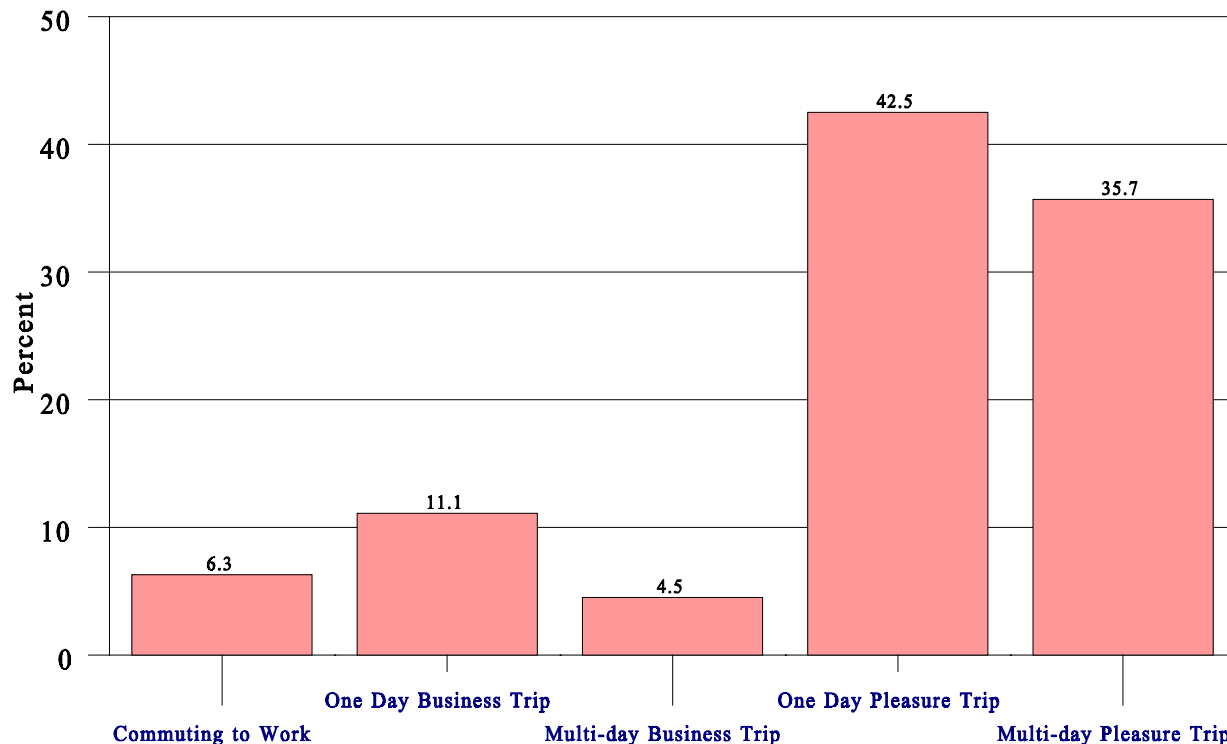
and that more than 30,000 people found the information useful in trip planning.

Services and Facilities. Passengers in the sample were asked to rate the facilities and services provided by the Ferries including 1) employee courtesy, 2) cleanliness of the landings, 3) cleanliness of the boat, 4) food service at the landings, and 5) restrooms. Figure 6 shows the distribution of responses to each of these items. In this figure, more dark colors means more favorable evaluations. Overall, passengers were very satisfied with the Ferry's services and facilities. On average, respondents rated employee courtesy ($\bar{x} = 4.25$), cleanliness of the boat ($\bar{x} = 4.16$), and cleanliness of the boats ($\bar{x} = 4.07$) above 4 on a 5 point scale where 4 is "very good" and 5 is "excellent." Respondents were somewhat less enthusiastic about the availability of restrooms ($\bar{x} = 3.66$) and the food service facilities at the landings ($\bar{x} = 3.56$), although these average ratings fell between "good" and "very good."



Purpose of Trip. Finally, respondents to the survey were asked about the purpose of their current trip on board the Ferries. They were given 5 response options: 1) commuting to work, 2) traveling on a one day business trip, 3) traveling on a multi-day business trip, 4) traveling on a one day pleasure trip, and 5) traveling on a multi-day pleasure trip. Figure 7 shows that the majority of Ferries passengers were traveling for pleasure (78.2%). Nearly half (42.5%) was traveling on a single day pleasure trip, while another third of the sample (35.7%) was traveling on a multi-day pleasure trip. Just 6.3% of the sample was using the Ferries to commute to work, while another 15.6% was traveling on either a one day or multi-day business trip.

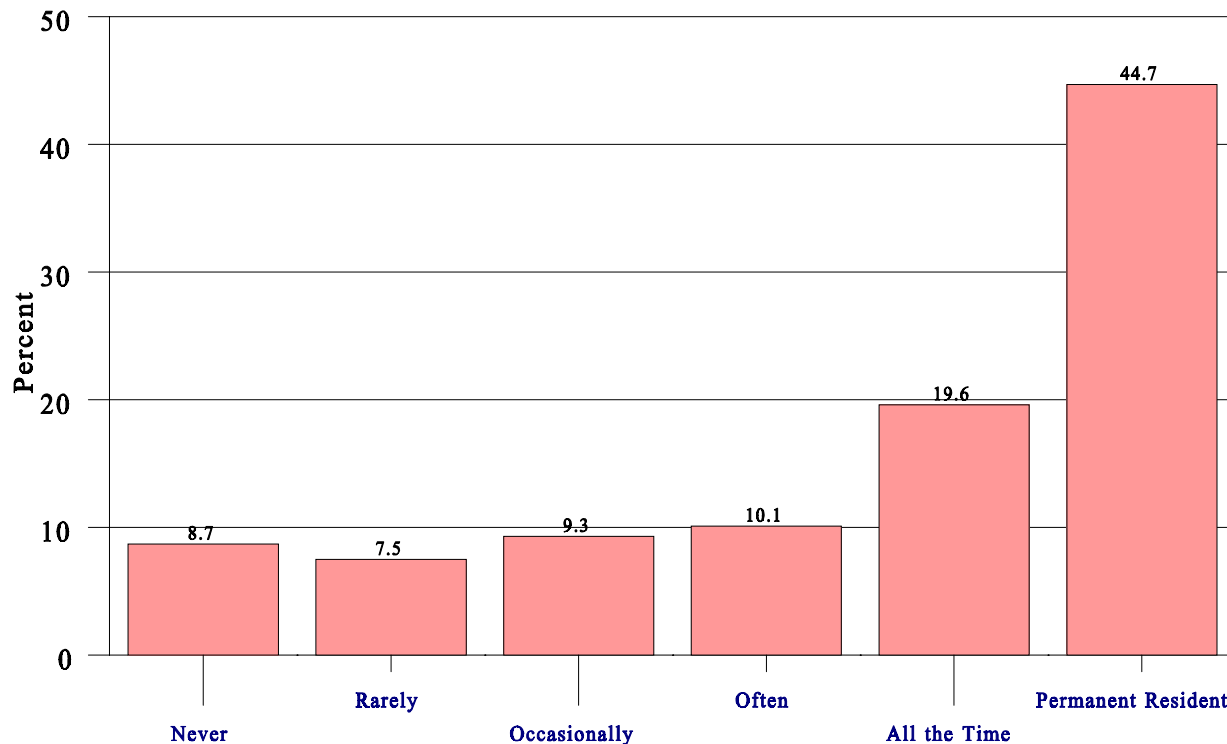
These proportions mean that as many as 230,000 people make single day pleasure trip to opposite sides of the lake each year. Another 195,000 people on multi-day vacations make trips across the lake on the Ferries. Roughly 85,000 people use the Ferries on business trips (day trips or multi-day trips) annually. Finally, commuters make roughly 35,000 trips across the Lake annually. The ratio of commuters using the Ferries (6.3%) is slightly lower than the number of people who reported that they used the Ferries "every working day" (between 7% and 8%). This difference may be due to the pedestrian commuters not sampled in this study who park a car at either side of the Lake.



Travel Patterns

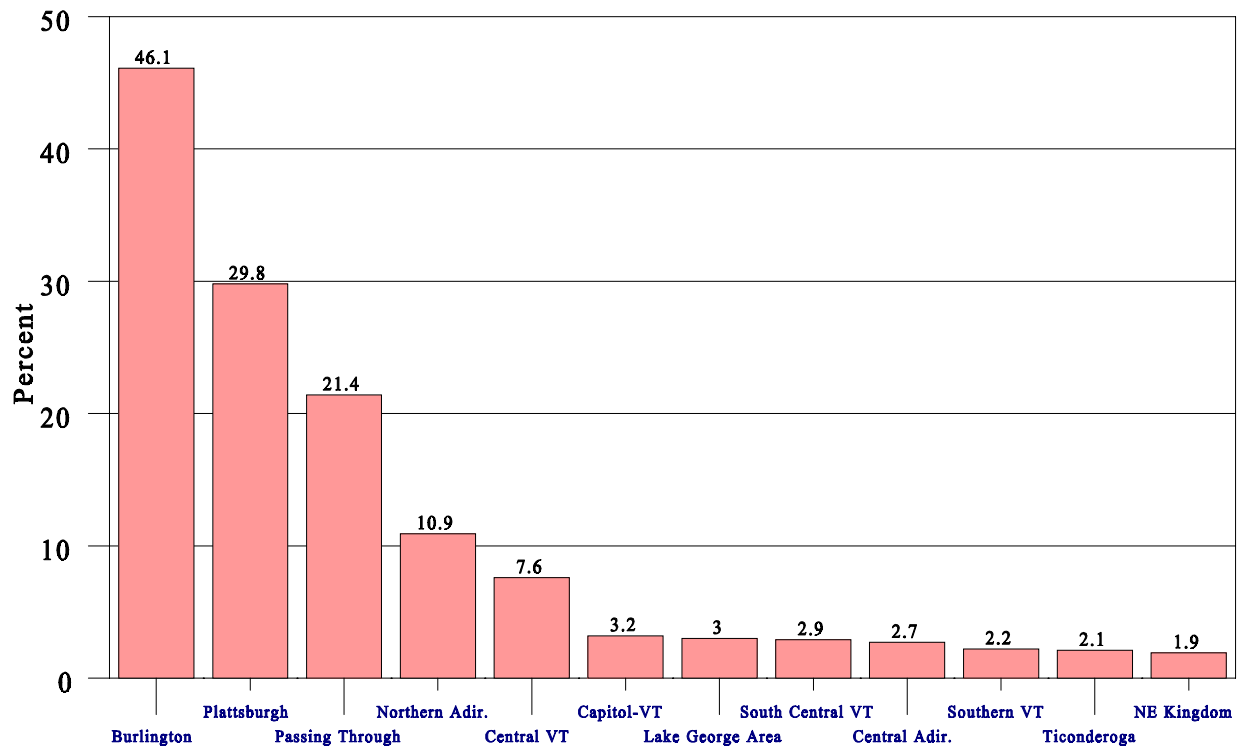
The remainder of the questionnaire was devoted to the trip characteristics of Ferries passengers. Respondents were asked to report their 1) specific travel destination within the Vermont/New York Adirondack region, 2) overnight accommodations used (if any), 3) sources of travel information used in trip planning, 4) sources of travel information in transit, 5) travel related activities, 6) tourist attractions visited, 7) trip expenditures, 8) interest in various forms of specialty travel, and 9) evaluation of the region's travel-related services.

Previous Visits to the Lake Champlain region. As a preface to these questions on trip characteristics, respondents were asked to estimate how often in the past they had ever visited the Lake Champlain region. People's knowledge of the area can have an affect on where they travel and what they do. Figure 8 shows the distribution of responses when the sample was asked "how frequently have you visited the Lake Champlain region in the past?" Nearly half the respondents (44.7%) were permanent residents in the region. The remaining nonresidents were evenly spread across the range of responses. About 1 in 10 passengers (8.7%) were first time visitors to the region, while another 7.5% had rarely visited the area, 9.3% occasionally visited the area ("once every few years"), and 10.1% visited the region often ("once every year or two"). Nearly one-fifth of the nonresidents (19.6%) were frequent visitors to the region coming to the area all the time ("more than once a year").



Primary Travel Destination. Passengers on the Ferries were asked what specific subregion of the Vermont/New York area was their main travel destination on their current trip. Vermont was divided into six distinct subregions: 1) Burlington/Champlain Valley, 2) Northeast Kingdom, 3) Central Mountains (Stowe, Waterbury, Mad River Valley, 4) Capitol (Montpelier, Barre), 5) South Central Mountains (Killington, Woodstock, White River Junction), and 6) Southern Vermont (Manchester, Bennington, Brattleboro). The New York Adirondack region was divided into 5 distinct subregions: 1) Plattsburgh/Ausable, 2) Central Adirondack (Blue Mountain Lake, Indian Lake), 3) Ticonderoga/Crown Point, 4) Northern Adirondack (Saranac Lake, Tupper Lake, Lake Placid), and 5) Southern Adirondack (Lake George region).

As expected, Burlington and Plattsburgh were the two most popular destinations for Ferries passengers (Figure 9). The Grand Isle/Plattsburgh Ferry, which receives 70% of the Ferry's business connects Plattsburgh with the Burlington/Champlain Valley area and these two metro regions consequently are the main destinations for three-fourths of the Ferries passengers (75.9%). The results also show a proximity effect. Burlington and Plattsburgh are the closest subregions to most of the Ferry landings. The further the destination is from the Ferry landings the less use people make of the Ferries who are visiting those places. For example, 10.9% of the sample was visiting the Northern Adirondack subregion - Saranac Lake, Tupper Lake, and perhaps more frequently Lake Placid. On the Vermont side, 7.6% of the sample was visiting the Central mountain subregion - Stowe, Waterbury, and the Mad River Valley. The remaining subregions located further from the landings were destinations for only a small percent of the sample (approximately 3% or less).



A fifth of the sample (21.4%) said they were only passing through the Lake Champlain Region on the way to another destination. This is less than the 29.7% who said their final destination was beyond Vermont or the New York Adirondack region in an earlier question (Figure 7). This may be due to this item's position in the list. The "passing through" option was the last of 12 options, and some may not have been noticed by all respondents. Some may have thought this was simply a list of local destinations and, if they were passing through, may have skipped over the question.

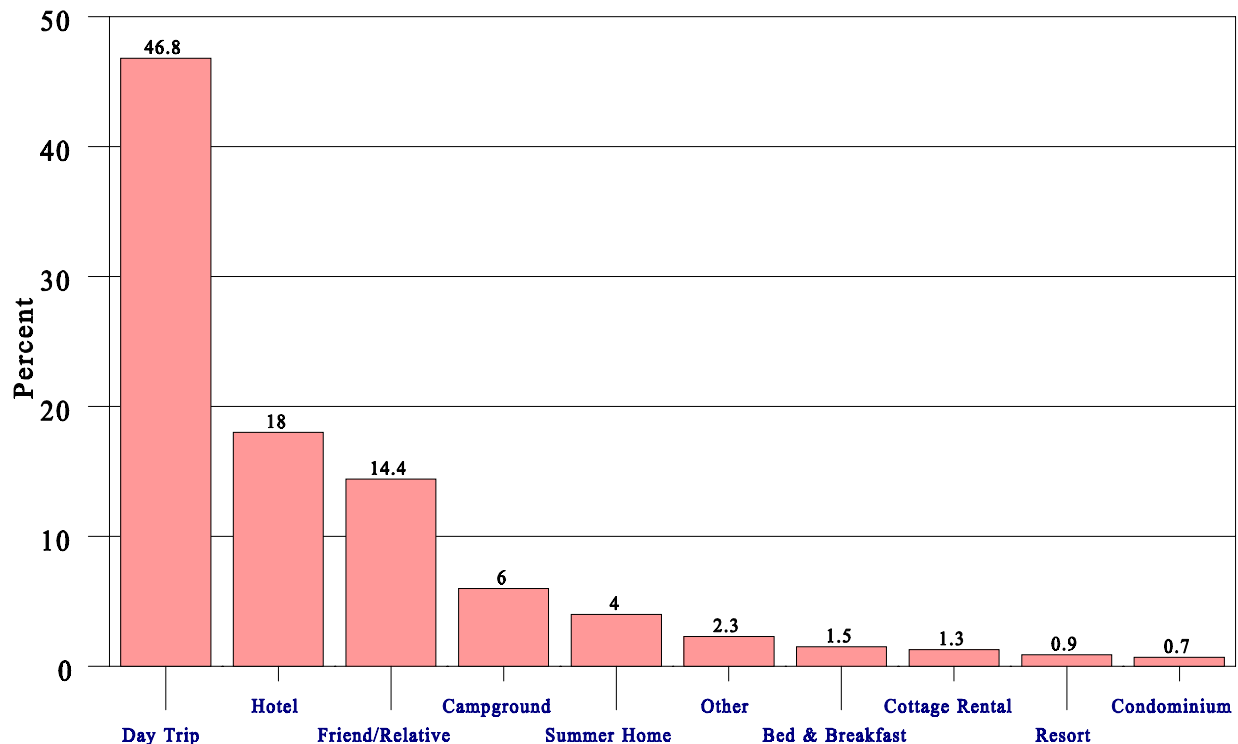
Most of the time, people who cross Lake Champlain on the Ferries enroute to more distant destinations are traveling to either places further west in New York or to New Hampshire or Maine. Table 1.1 shows the destinations of respondents who said they were just passing through. Through destinations are about evenly spread between New York (17.0%), New Hampshire (11.6%), Maine (14.5%), and Massachusetts (10.6%). These four states comprise 53.7% of the through trips that passengers make on the Ferries. Another 20.7% of the through trips on the Ferries are to destinations in Canada (Nova Scotia, Prince Edward Island, New Brunswick, Ontario, Quebec, and Manitoba), while 11.6% of the through trips are to destinations in other states in the United States (Connecticut, Rhode Island, Pennsylvania, New Jersey, Ohio, Wisconsin, Michigan, Georgia, Missouri, Illinois, and West Virginia).

Table 1.1. Destinations of through passengers who rode the Ferries while passing through the region.

Destination	Number of People	% of through passengers	% of total sample
New York	29	14.1	2.6

Albany	6	2.9	0.5
New Hampshire	24	11.6	2.1
Maine	30	14.5	2.7
Massachusetts	6	2.9	0.5
Boston	16	7.7	1.4
Northeastern United States	14	6.8	1.2
Quebec	6	2.9	0.5
Montreal	10	4.8	0.9
Maritime Provinces	7	3.4	0.6
Ontario	3	1.4	0.3
Toronto	6	2.9	0.5
Rest of Canada	11	5.3	1.0
Rest of United States	10	4.8	0.9
Could not tell	28	13.6	2.5

Overnight Accommodations. Passengers who were making a multi-day trip through the area were asked what accommodations they used. Figure 10 shows that hotels were the most frequently used types of accommodations by travelers crossing on the Ferries (18.0%). This was followed closely by people who stayed with friends or family while visiting the area (14.4%). Another 6% of the sample camped while visiting the region, while 4% stayed in summer homes or camps. Bed and Breakfast establishments, cottage rentals, resorts, and condominiums each were used by fewer than 2% of the sample. A small percent (2.3%) also used miscellaneous accommodations while traveling in the region such as sleeping in one's car, the Ronald McDonald house, and sleeping on one's boat/yacht.

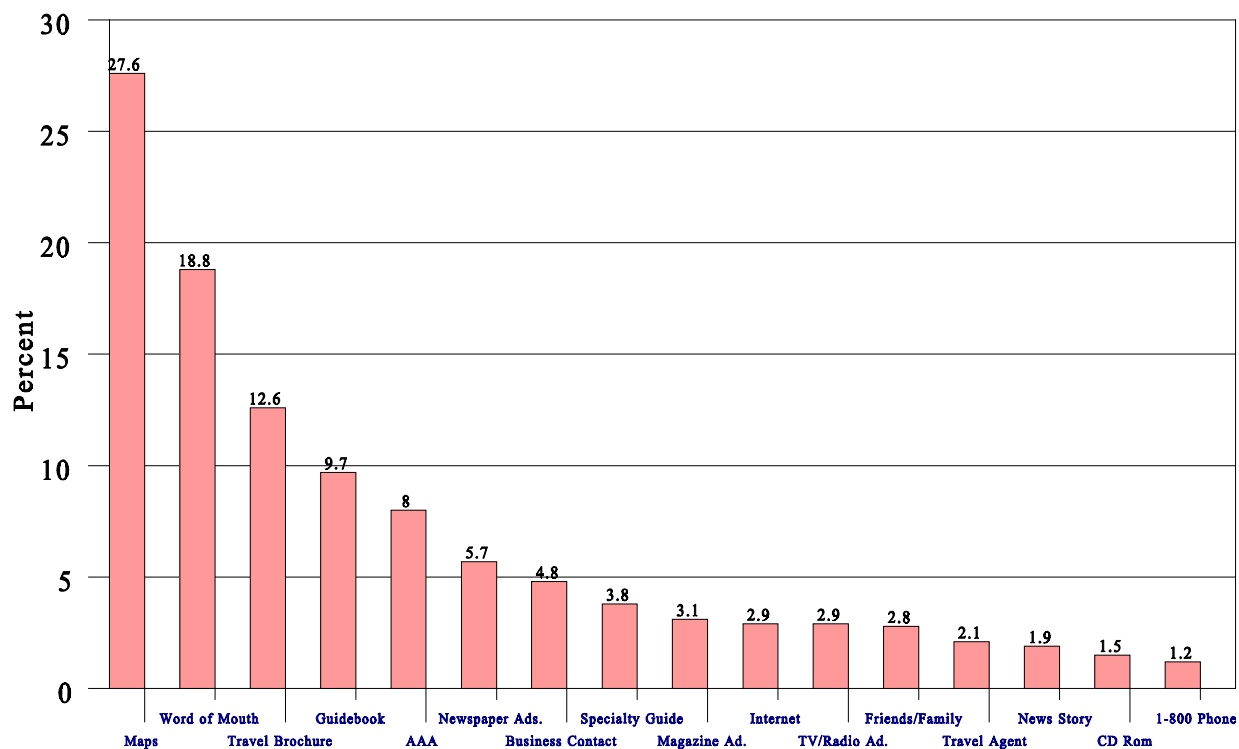


The 46.8% of the sample that said they were traveling on a day trip also does not match the number of day trippers reported in Figure 7. The results in Figure 10, however, exclude 6.3% of the sample that was commuting to work, since the questionnaire asked commuters to skip over these travel related questions to the end of the survey.

Sources of Information Used in Trip Planning. Respondents were next asked to indicate what sources of information they used to help plan their current trip. The questionnaire offered 15 options and an "other" category. There were 138 people in the sample (12.3%) who did not respond to this question. Presumably these were the people who were local residents who did not think of their trips as a vacation or pleasure trip, and who did not need to rely on formal sources of travel information. Another 201 people (17.9%) offered "other" information sources they used. Many of these responses reflected people's local knowledge of the area and included things like routine trip (4.4%), visits to medical facilities (1.0%), "local" knowledge (4.8%), spur of the moment trips (0.5%), and trips to the Burlington airport (0.2%).

The results shown in Figure 11 indicate that those passengers who are consumers of travel information make most frequent use of maps (27.6%), word of mouth (18.8%), and travel brochures from individual attractions or businesses (12.6%). The importance of word of mouth comes as no surprise to anyone. The frequent use of maps, however, as a key source of travel information continues to reinforce previous research on Vermont visitors (Kuentzel & Valliere, 1993; 1994; 1995). The next most frequent sources of travel information used by the sample were regional travel guidebooks (9.7%) and automobile club publications like AAA (8.0%). Business contacts (4.8%)

and specialty travel guides (3.8%) such as heritage tour guides or shopping guides were used by a small niche of Ferries passengers.



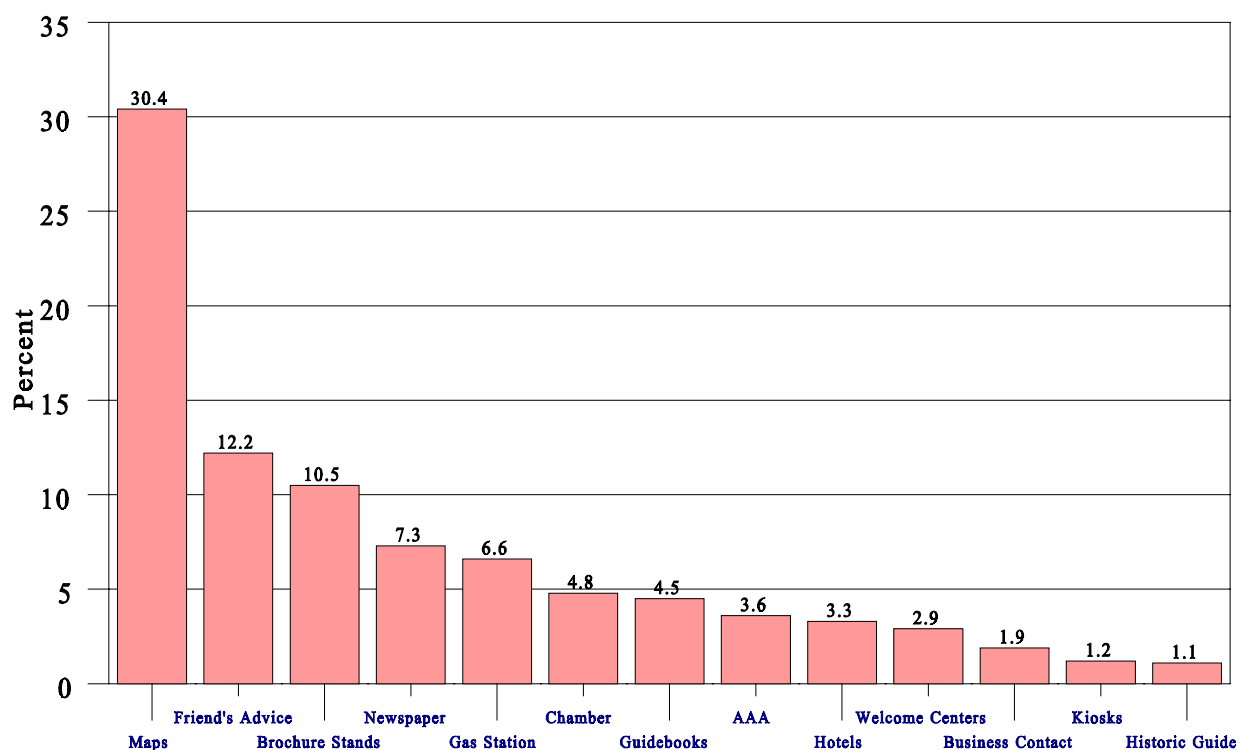
The results again show that media advertising like newspaper ads (5.7%), magazine ads (3.5%), television and radio advertising (2.9%), and even newspaper or magazine feature stories (1.9%) play a less important role among travelers on the Ferries. Another less important information source was toll free 1-800 numbers. Only 1.2% of the Ferries passengers used these numbers for travel information. This means that only around 6600 people who cross the Ferries each year receive travel information from these outlets. The State of Vermont's 1-800-VERMONT number receives roughly 150,000 calls a year. This means that only about 4% of those calls come from people who use the Lake Champlain Ferries.

Figure 11 also shows that new technologies such as the internet and CD-Roms are beginning to become an information source for a measurable number of travelers. More people traveling on the Ferries are using CD-Roms (1.5%) and internet homepages (2.9%) as information sources than more traditional means such as toll free 1-800 numbers or even travel agents (2.1%).

Some of the "other" sources of travel information included information from family or friends with whom the respondent was visiting (2.9%), ferry schedules, and through special events such as Elderhostel, automobile races, UVM student orientation, Paddleways kayak tours, the Phish newsletter, the Lippizan Stallions, polo matches in Sugarbush, and craft shows. One person received

information from a Chamber of Commerce, another said he/she received information through church, and another said he/she used an automap computer.

Sources of Information Used While Traveling in the Area. Maps continue to be the most important source of travel information (30.4%) for Ferries passengers once they are traveling in the area (Figure 12). Similarly, advice from friends is an important source of travel information once one is in the middle of one's trip (12.2%), although its importance as a travel information source is somewhat diminished from the trip planning stages. Travel brochures are also important sources of information as one is traveling, as 1 in 10 Ferries passengers took information from travel brochure stands (10.5%). Newspapers take on considerably more importance to the visitor who is traveling in the region than it does in the planning stages. As many as 7.3% of the Ferries passengers used local newspapers as a source of travel information once they were traveling in the region. Passengers would ask for travel information from local gas station attendants or retail store clerks (6.6%), chamber of commerce information centers (4.8%), hotel desk clerks (3.3%), interstate welcome centers (2.9%), and information kiosks (1.2%). Travel guides were used somewhat sporadically once visitors had arrived at the destination: regional travel guides (4.5%), automobile club guides (3.6%), and the specialty guides like the Lake Champlain Historic Sites guide (1.1%).



Once again, 147 people (13.1%) did not answer this question presumably indicating that as local residents, they did not need travel information for their trips. Similarly, most of those who offered an "other" information source specifically said they needed no travel information (4.2%) or that they

lived in the area and were knowledgeable about the region (4.7%). Other individuals said they used highway signs, marine charts, or information from state troopers, waiters or waitresses, designated drive information, Paddleways kayak information, and a hand-written map.

Travel Activities on Current Trip. Respondents were given a list of 15 different travel activities that they may have participated in on their current trip including items like hiking, visiting museums, business meetings, observing wildlife, shopping, and attending special events. If respondents checked shopping, they were asked where they went shopping. Finally, all respondent's were offered an "other" option to report activities not included in the forced choice list. Figure 13 shows the rank ordered activities that Ferries passengers engaged in during their trips.

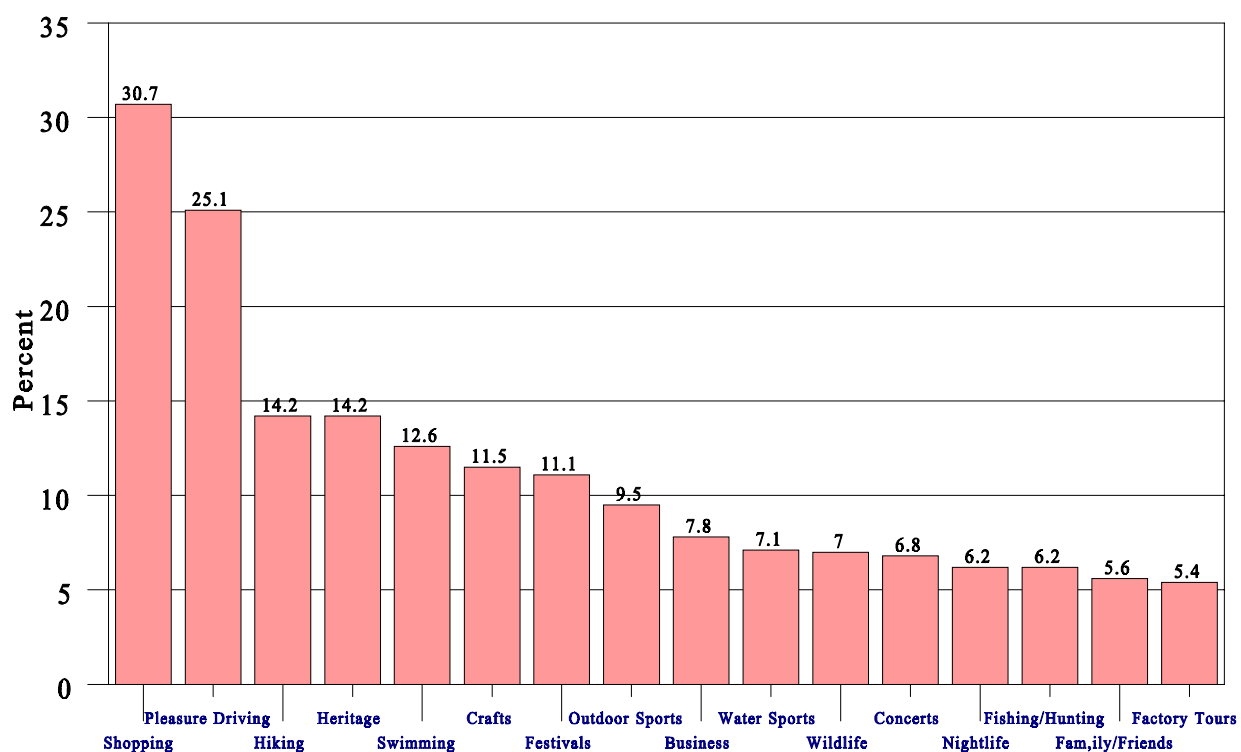


Figure 13 shows that shopping was the most frequent activity among Lake Champlain Ferries passengers with nearly a third of the sample (30.7%) participating in this activity. This means that the Ferries facilitate nearly 170,000 shopping trips across the Lake during the year. Among the 345 people in the sample who said they were making shopping trips, 153 people (44.3%) listed Burlington as their shopping destination, while 70 people (20.3%) listed Plattsburgh as their shopping destination. Therefore, during the year, as many as 75,000 people use the Ferries to make shopping trips to Burlington, while nearly 35,000 people use the Ferries to make shopping trips to Plattsburgh. Other destinations mentioned by shopping passengers included other places in Vermont (3.5%), other places in New York (4.3%) with 9 of these 15 people shopping in Lake Placid, New Hampshire (3.7%) with 3 of these 13 people mentioning North Conway, and Maine (3.2%). Finally,

5 people (1.4%) mentioned shopping in Massachusetts and 5 people mentioned shopping in Montreal. Additionally, 12 of the shopping passengers (3.5%) on the Ferries said they shopped at Outlet Malls, while 3 of the shopping passengers (0.9%) said they were shopping for antiques.

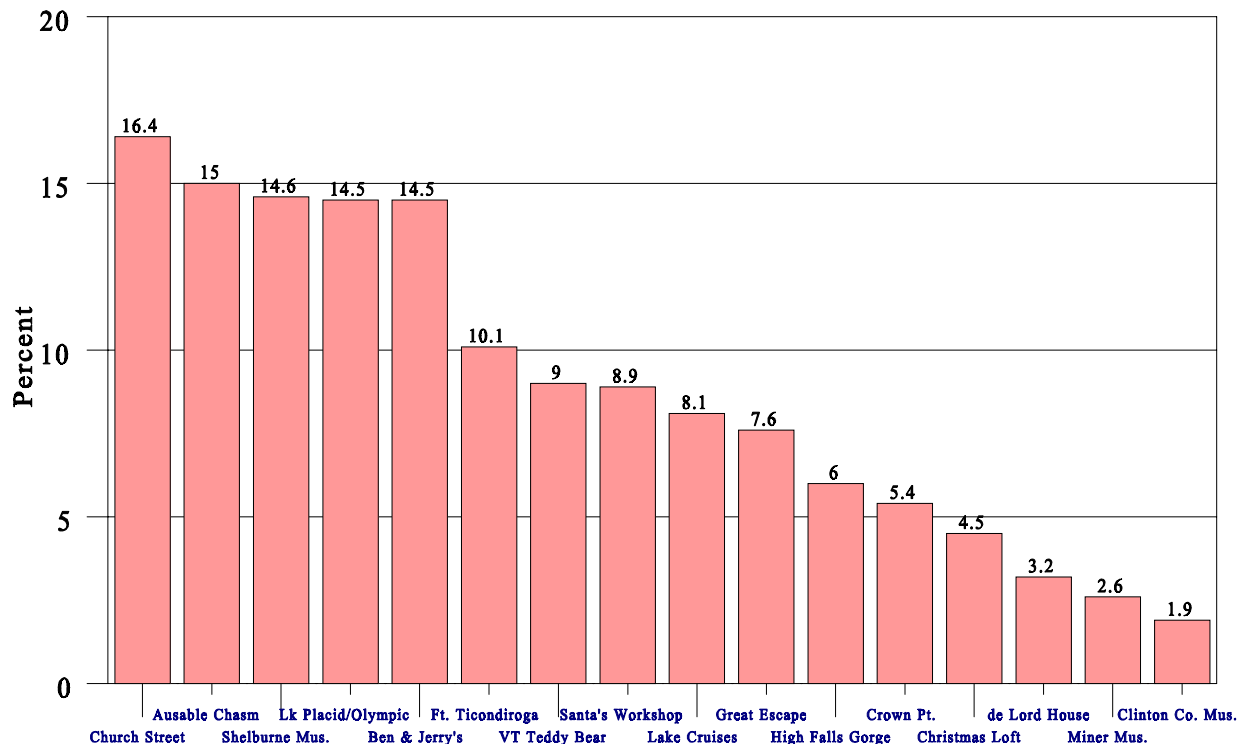
Pleasure driving was the second most frequent activity among Lake Champlain Ferries passengers with one in four people (25.1%) reporting this as a travel activity. This implies that as many as 140,000 people annually use the Ferries as part of a leisurely excursion to enjoy the scenery and attractions of the Lake Champlain region.

Among the more commonly cited activities among Ferries passengers were hiking (14.2%), visiting museums or historic sites (14.2%), swimming (12.6%), visiting craft shows or art studios (11.5%), attending fairs, festivals, expositions, or other special events (11.1%), and outdoor sports like golf, tennis, or horseback riding (9.5%). Somewhat less frequently cited activities included business meetings (7.8%), water sports like sailing, canoeing, windsurfing, water skiing, or scuba diving (7.1%), watching wildlife (7.0%). The least popular activities among Ferries passengers included attending concerts or performing arts (6.8%), visiting night clubs or other night time entertainment (6.2%), fishing or hunting (6.2%), and going on factory tours (5.4%). Additionally, the concert item may be slightly inflated since we sampled at the Grand Isle/Plattsburgh ferry on the day after the August Phish concert, and the Ferry was running an extra boat to accommodate all the people leaving the show.

Passengers were also given an "other" category with room to describe activities not provided in the forced choice list. More than one fifth of the sample (22.3% or 251 people) provided other activities.

The most frequently cited activity in this category was visiting family or friends where 63 people or 5.6% of the entire sample listed this as a travel activity. This category included one fourth of the people who offered an "other" travel activity. Other common travel activities mentioned were medical appointments (34 people), attending a college graduation or school event (15 people), attending a sporting event, particularly auto racing (15 people), attending a wedding (12 people), and dropping someone off or picking someone up at an airport, train station, or bus station (11 people). Those less frequent activities mentioned 5 to 10 people included dining or picnicking, attending a funeral, biking, and attending a church related event.

Area Attractions Visited by Ferries Passengers. Respondents were asked which Lake Champlain region tourist attractions they may have visited during the trip in which they crossed one of the Ferries. The questionnaire provided a list of 16 prominent attractions on both sides of the Lake, many of whom were advertisers on the travel information radio broadcast at the Ferries landings. In addition, respondents were asked to list any other 1) historic sites, 2) natural attractions, or 3) built attractions that they may have visited during their trip (Figure 14).



The most popular tourist attractions among Ferries passengers were the Church Street Market Place (16.4%), Ausable Chasm (15.0%), Shelburne Museum (14.6%), the Lake Placid Olympic Center (14.5%), and Ben & Jerry's Ice Cream Factory (14.5%). Between 80,000 and 90,000 Ferries passengers visit each of these attractions annually. The attractions that were of moderate interest to Ferries passengers included Ft. Ticonderoga (10.1%), the Vermont Teddy Bear Factory (9.0%), Santa's Workshop (8.9%), Lake Cruises on special excursion boats (8.1%) and the Great Escape (7.6%). Anywhere from 42,000 to 55,000 Ferries passengers visited each of these attractions annually. Finally, the attractions that were of less importance to Ferries passengers included High Falls Gorge (6.0%), Crown Point (5.4%), the Christmas Loft (4.5%), the Kent de Lord House (3.2%), the Alice T. Miner Museum (2.6%), and the Clinton County Museum (1.9%). As many as 33,000 Ferries passengers visited High Falls Gorge during the 1995 season while as many as 10,000 Ferries Passengers visited the Clinton County museum during the 1995 season.

Another 30 people (2.7% of the sample) in the sample mentioned other historic attractions that they visited on their trip. The most frequently cited (mentioned by more than 1 person) were the Maritime Museum at the Basin Harbor Club, the John Brown Household, the Adirondack Center Museum, and the Remington Museum. Similarly, 36 people (3.2% of the sample) mentioned other natural attractions that they visited including Mt. Philo, Mt. Mansfield, the Adirondacks, and "mountains." Finally, 26 people (2.3% of the sample) mentioned other built attractions that they visited including Parc Safari in Montreal and the Airborne International Speedway.

Trip Expenditures. Respondents in the study were asked to estimate either their total trip expenditures if they were on the way home from a trip or the amount of money they expected to

spend if they were just beginning their trip. Among people who reported expenditure information (63% of the total sample), 56% said they were estimating how much money they had spent on the trip, 28% said they were estimating how much money they expected to spend on their trip, while 16% did not say. Respondents were asked to estimate expenditures in 5 categories: transportation, food and beverage, lodging, general retail purchases, and entertainment and recreation.

Expenditure data such as these have 3 major limitations that can create significant measurement error in the estimates and produce problems with estimate reliability. First, respondent's recall of their expenditures may not be accurate, particularly among those taking longer trips. Second, the nature of the sampling method means that we contacted some people at the beginning of their trip before they began spending money. Therefore, these estimates include both actual expenditures along with intended expenditures, and intended expenditures may not always correlate with actual expenditures. Finally, Figure 15 lists expenditures for business travelers and pleasure travelers. The sample sizes for one day business travelers ($n = 62$) and multi-day business travelers ($n=29$) were quite low. The large standard deviations that typically accompany expenditure data create large margins of error, and therefore low estimate reliability.

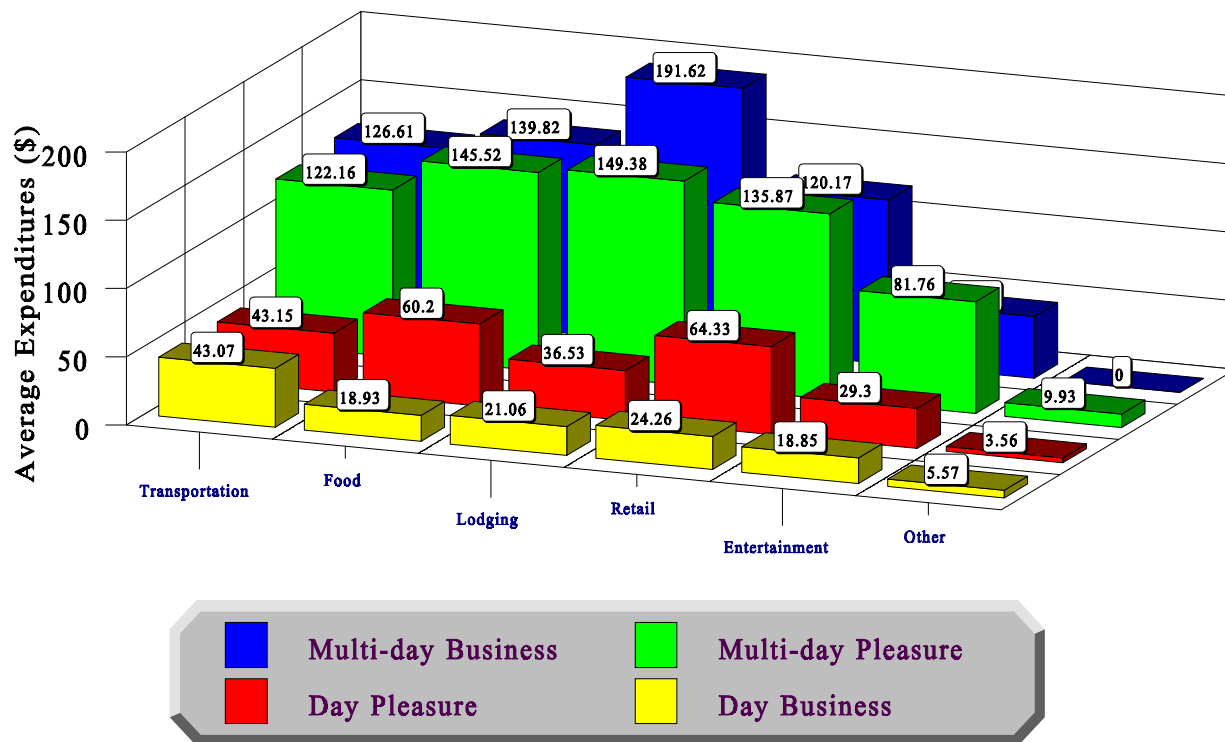
Margin of error calculations allow one to judge how confident one can be that the sample accurately estimates the real number from the total population. The larger the margin of error, the less certain one is that the sample estimates are reliable. For example, Figure 15 shows that the average transportation expenditure for multi-day business travelers was \$126.61 or roughly equal to the \$122.16 average among multi-day pleasure travelers. The sample size, however, for multi-day business travelers was 29 while the sample size for multi-day pleasure travelers was 274. Consequently, the small sample size of the business traveler sample produces a much larger margin of error than the pleasure travelers. The margin of error for multi-day business travelers was plus or minus \$96.60. This means that if we surveyed different samples of multi-day business repeatedly, their transportation expenditures would fall somewhere between \$30.01 and \$223.31 in 95% of the different samples. This lack of precision in our estimate does not lend a great deal of confidence in our average estimate of \$126.61. On the other hand, the margin of error for multi-day pleasure travelers was plus or minus \$32.37. Therefore, if we repeatedly sampled multi-day pleasure travelers, we would expect the average transportation expenditures to fall somewhere between \$89.79 and \$154.53. This confidence interval makes us more certain about the expenditure estimate for multi-day pleasure travelers.

In all, the margin of errors for each of the expenditure categories among one-day and multi-day business travelers were nearly as large as the estimates themselves, making conclusions about business expenditures among Ferries passengers less reliable and more suspect. Margins of error among one day and multi-day pleasure travelers on the Ferries were generally much smaller - approximately one-fifth the size of the estimate. Expenditure estimates for pleasure travelers on the Ferries were therefore more reliable and provide a better ball-park estimate for these passengers.

With these reliability caveats, the results show that one day business travelers who used the Ferries spent an average of \$130.74 and one day pleasure travelers spend an average of \$237.07 (Figure 15).

The one day business traveler spent the most money on transportation. The one day pleasure traveler spent a similar amount of money on transportation as the business traveler (~ \$43.00), but roughly three times more money on food and retail expenses. These expenditure data support the notion that there is a distinct group of people who use the Ferries for single day shopping and dining excursions across the Lake, and who spend on average just over \$200 per trip.

Multi-day business travelers spent an average of \$623.39 per trip while multi-day pleasure travelers spent an average of \$644.62 during their trip. Differences in expenditures between multi-day business and multi-day pleasure travelers were less pronounced than one day business and pleasure travelers. Both multi-day business and pleasure travelers spend approximately the same on transportation, food, and retail purchases. Business travelers spent more money on lodging while the pleasure traveler spend more money on entertainment during their stay in the Lake Champlain region.



Interest in Specialty Travel. The questionnaire asked respondents about their interest in various types of specialty travel including heritage tourism, ecotourism, watchable wildlife, factory tours or industrial district tours, agricultural tourism, sports tourism, and gambling. Respondent's were asked to rate their interest on a 4-point scale: 1) not at all interested, 2) slightly interested, 3) moderately interested, and 4) very interested. Figure 16 show the distribution of responses to each of these specialty travel activities. More dark colors in this Figure (blue and maroon) mean more interest, while conversely more light colors (yellow and green) mean less interest in these travel activities.

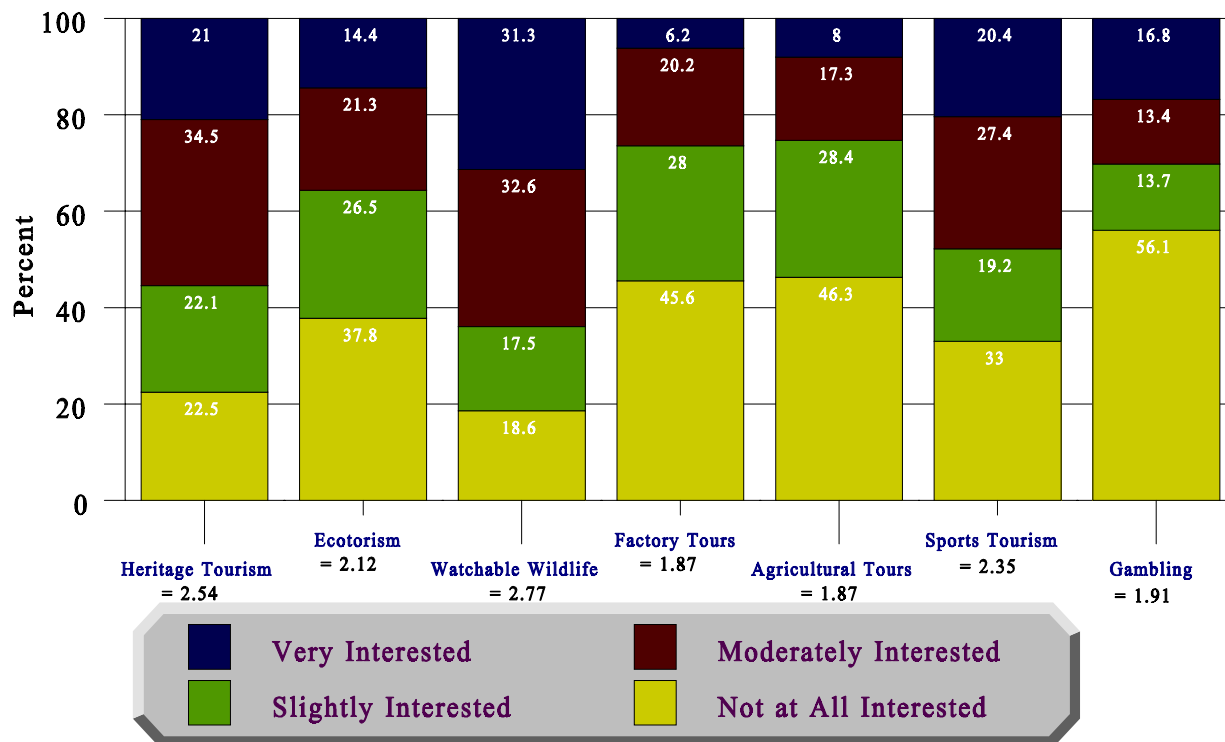
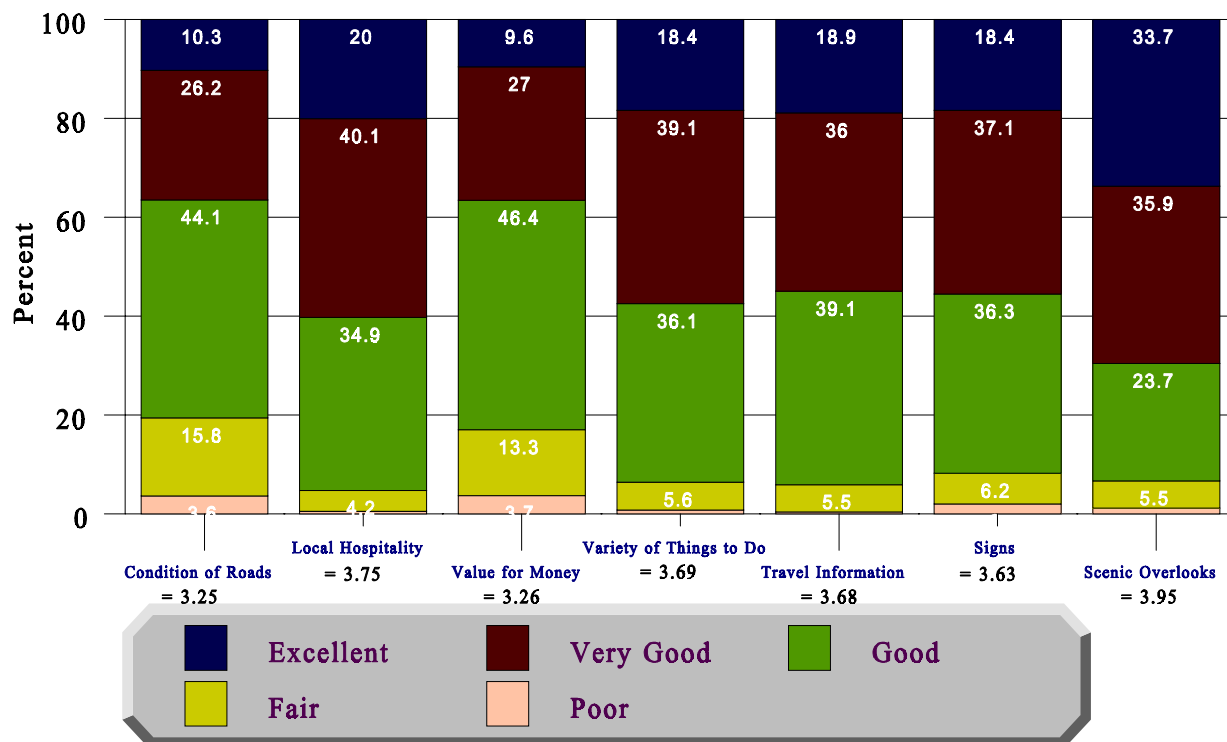


Figure 16 shows that Ferries passengers were most interested in watching wildlife ($\bar{x} = 2.77$) where one fourth of the sample said they were very interested and another third of the sample said they were moderately interested in this activity. The sample was also interested in visiting historic sites and museum ($\bar{x} = 2.54$) where just over half the sample said they were very interested or moderately interested in this activity. There was also moderate interest in sports related tourism such as going to athletic events or attending sports centers like the Lake Placid Olympic Center ($\bar{x} = 2.35$). Just under half the sample said they were very interested or moderately interested in this type of specialty travel.

The sample showed less interest in activities such as ecotourism ($\bar{x} = 2.12$) and gambling ($\bar{x} = 1.91$). Nearly two-thirds of the sample showed no interest or a slight interest in ecotourism, while almost three-fourths of the sample showed no interest or a slight interest in gambling. These two types of specialty travel, however, do appear to be niche markets attracting a measurable proportion of the sample who are very interested or moderately interested in these activities. Finally, few people in the sample expressed any interest in factory tours ($\bar{x} = 1.87$) or agricultural tourism ($\bar{x} = 1.87$). Less than 10% of the sample said they were very interested in these activities. This suggests these latter two specialty travel activities may be opportunistic activities. People may visit factory tours and agricultural facilities when available, but they do not appear to be strong travel motivators.

Quality of Travel Related Services. Finally, respondents were asked to evaluate the quality of the travel related services and facilities encountered on their trip in the Lake Champlain Region,

including condition of roads and highways, hospitality of the local people, value for one's money, variety of things to do and see, availability of travel information, highway directional signs, and scenic overlooks (Figure 17). These questions are oriented toward the tourist who is traveling through the region, and may not be applicable to all local travelers.



Overall, Figure 17 shows favorable evaluations of the travel related services in the region. At least half the sample rated local hospitality ($\bar{x} = 3.75$), variety of things to do and see ($\bar{x} = 3.69$), availability of travel information ($\bar{x} = 3.68$), highway directional signs ($\bar{x} = 3.63$), and scenic overlooks ($\bar{x} = 3.95$) as either very good or excellent. Conditions of the roads ($\bar{x} = 3.25$) and value for the money ($\bar{x} = 3.26$) were rated somewhat lower with more than half the sample rating these two items poor, fair, or good. Almost no one rated any of these 6 items poor, and travelers through the region were generally happy with the quality of the travel related services and facilities in the region.

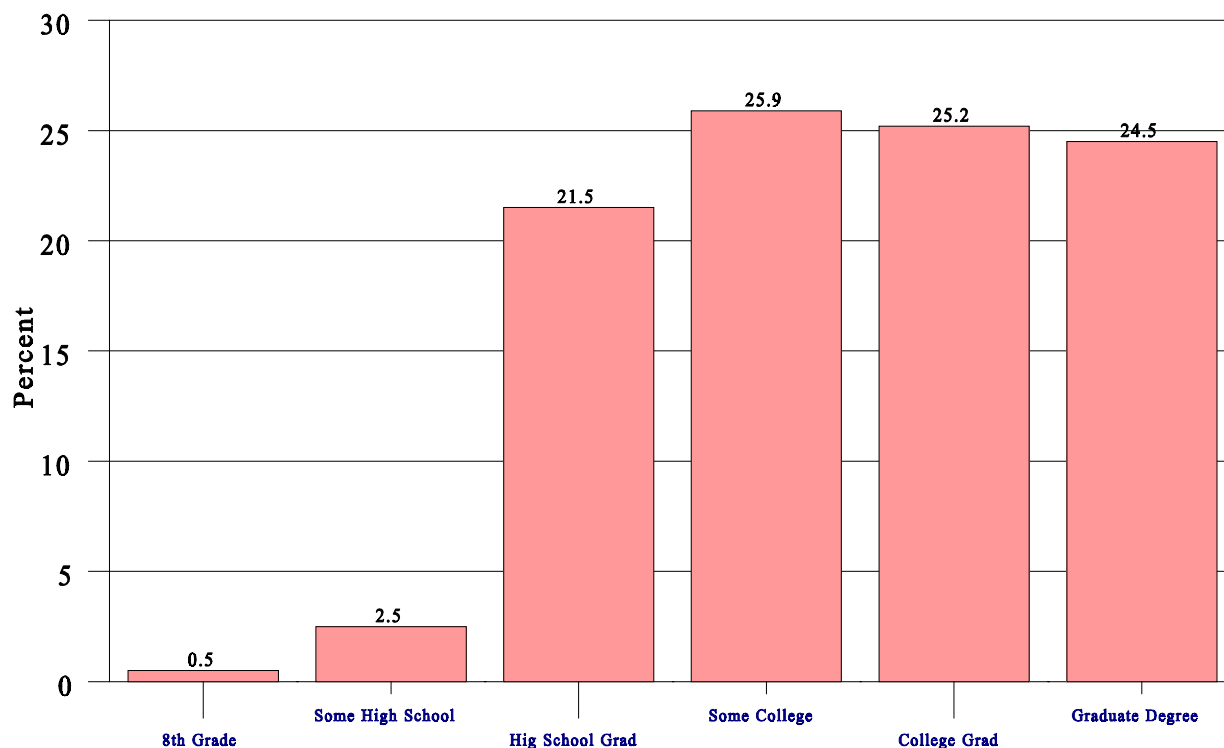
Demographic Profile

Finally, the questionnaire asked respondents a number of questions about their gender, age, education, income, family structure and residence.

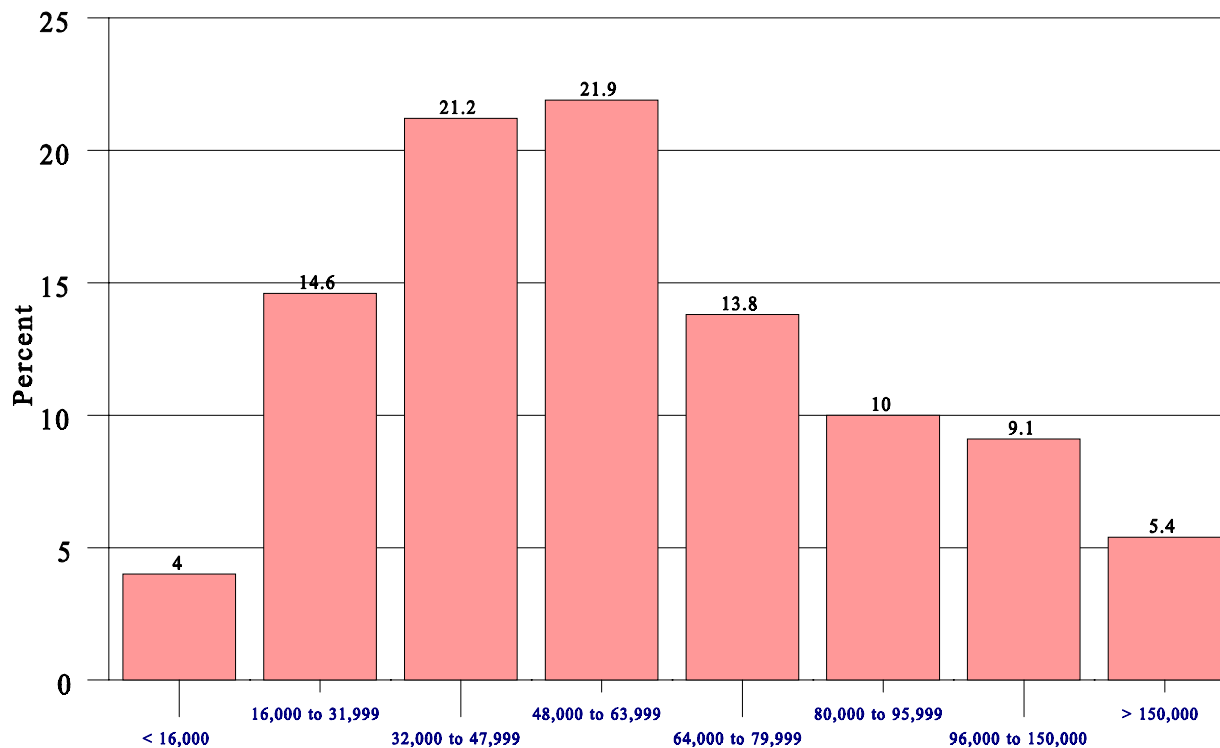
Gender. The sample included 472 women (42.1%) and 648 men (57.9%). This skewed ratio of men is probably a sampling effect. There may be a social convention where men are more frequently drivers in male/female couples. The sampling procedures called for asking the driver of each car to

participate in the survey. The male/female ratio, however, is not excessively skewed, and should not introduce bias into the questionnaire responses.

Education. The questionnaire asked respondents to report the number of years of school completed. Figure 18 shows a highly educated group of passengers. A fourth of the sample had completed a graduate degree (24.5%), another fourth had completed college (25.2%), and another fourth still had some college or technical training (25.9%). Nationally, only about 5% of the population has completed a graduate degree, while another 9% have completed college. Therefore, the results show that Lake Champlain Ferries passengers are a well-educated group of baby boomers.

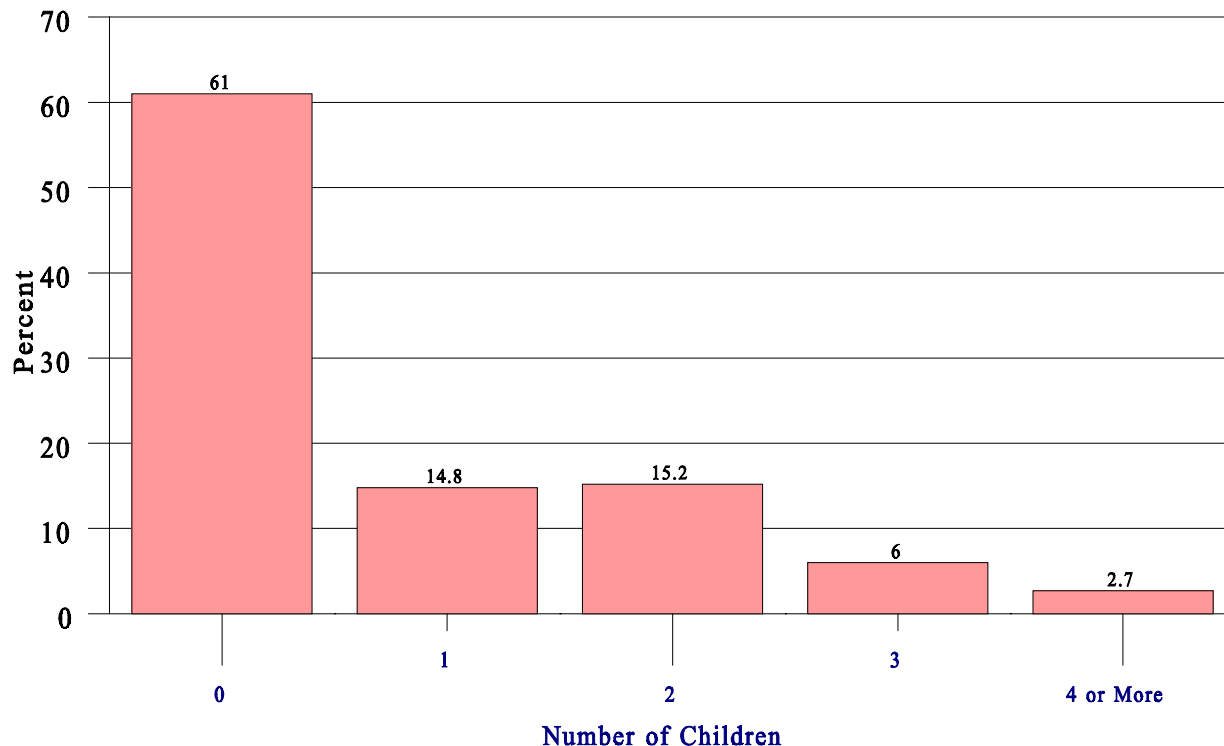


Income. Respondents were given 8 broad categories to report their total family income before taxes. Figure 19 shows that the median household income among the sample was between \$48,000 and \$64,000. This too was somewhat above the national median household income that falls in the mid \$40,000 range. Figure 19 shows that just under 40% of the Ferries passengers have household incomes at, or below, the national median. At the other end of the income distribution, one-fourth of the sample (24.5%) have household incomes of \$80,000 or more. So apparently, income follows education with this sample. More education among the sample compared with the national average means higher median incomes than the national average.



Age. The age range of respondents to this survey was from 15 years old to 85 years old. The mean and median age of the respondent was 42 years old with a standard deviation of 13.67 years. This means that the majority of Lake Champlain Ferries passengers was between 28 years old and 54 years old. In other words, Ferries passengers are overwhelmingly a baby boomer crowd.

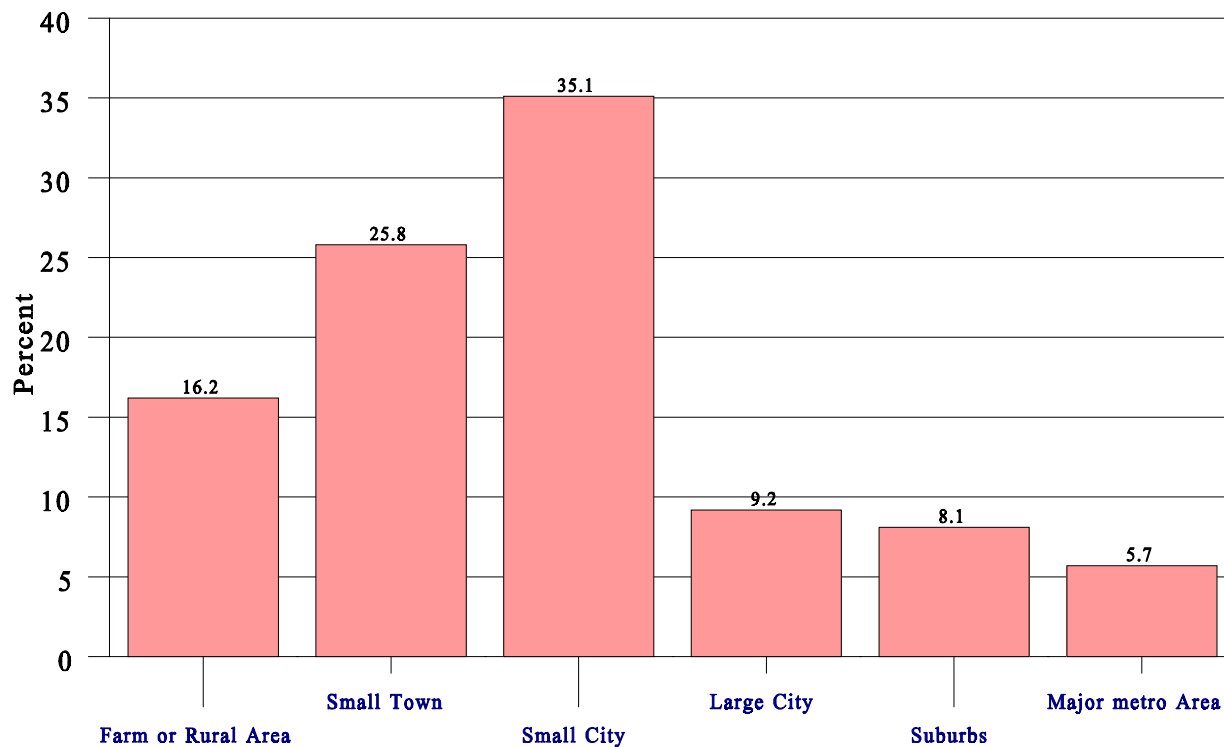
Number of Children. Figure 20 mirrors the findings about group size and composition that showed more than three-fourths of the sample did not travel with children. Nearly two-thirds of the sample (61.0%) do not have any children under 18 years of age. Another 14.8% have only 1 child under 18, 15.2% have two children, 6.0% have 3 children under 18, and 2.7% have 4 or more children under 18 years old. One person reported having 8 children, another person reported having 7 children, 4 people had 6 children, and another 4 people had 5 children. This finding reiterates that the Ferries are not a strong player among the family travel market.



Residence. Respondents were asked two questions about their residence. First they were asked to report what size town or city: 1) farm or rural area, 2) small town of less than 5000 people, 3) small city between 5000 and 50,000 people, 4) large city of 50,000 to 500,000 people, 5) suburban area outside a large metropolitan city, and 6) a major metropolitan city of over 500,000 people. Second respondents were asked to write in their zip code.

Figure 21 shows the distribution of the sample by size of residence. Most of the sample lived in a rural area (16.2%), small town (25.8%), or small city (35.1%). This probably reflects the local population of Vermont and upstate New York residents. Burlington and Plattsburgh are the largest cities in the region and both fall within the "small city" classification used by the questionnaire. The township form of government, especially in the Burlington region probably inflates the small city responses, since the Burlington metro region qualifies as a large city, but people probably listed their township within the Burlington area. Nearly 1 in 4 of the remaining passengers (23.0%) came from large cities, suburbs or major metropolitan cities.

Table 1.2 shows the state of residence of the sample. As expected, this table shows that three fourths of the Ferries passengers live in the Northeast region of the United States. Specifically, the majority of visitors (54.3%) live within the Lake Champlain basin serviced by the Ferries. Slightly more of the Ferries passengers live in New York (28.2%) than Vermont (26.1%). This may in part account for the more frequent trips that Ferries passengers make to Burlington than to Plattsburgh (Figure 9). Another 20% of the Ferries passengers come from either New England states (9.3%) or other Northeastern U.S. states (11.1%).



Canadian traffic on the Lake Champlain Ferries was low. Only 4.5% of the 1996 passengers were from Canada. Fewer of the Canadian passengers were from Quebec (1.3%) than from Ontario (2.7%). These ratios most likely do not reflect the full volume of Canadian travel in the Lake Champlain region. Travel for most people from Quebec is via north/south routes (I-87 in New York and I-89 in Vermont), and east/west travel routes are unnecessary diversions. Ontario residents traveling to Vermont or places further east may also find better east/west routes further north in Canada. Therefore, these percentages of Canadian travelers on the Ferries may reflect the tourist who has selected the Lake Champlain region for multi-day vacation. These numbers probably do not reflect the person making a day long shopping excursion across the border.

Finally, the remaining passengers hailed from states in the Southern or mid-Atlantic states (4.3%), the midwestern states (2.7%), and western states (1.9%).

Table 1.2. State of residence of Lake Champlain Ferries passengers.

STATE	NUMBER	PERCENT
Lake Champlain Region	608	54.3
New York	316	28.2

Vermont	292	26.1
New England	104	9.3
Massachusetts	44	3.9
New Hampshire	36	3.2
Maine	15	1.3
Connecticut	9	0.8
Northeastern U.S.	124	11.1
Rest of New York	90	8.0
New Jersey	18	1.6
Pennsylvania	16	1.4
Canada	50	4.5
Ontario	31	2.7
Quebec	15	1.3
Nova Scotia	2	0.2
New Brunswick	1	0.1
Alberta	1	0.1
Midwest U.S.	30	2.7
Michigan	15	1.3
Ohio	6	0.5
Missouri	3	0.3
Wisconsin	2	0.2
Indiana	1	0.1
Illinois	1	0.1
Kansas	1	0.1
Nebraska	1	0.1
Southern and Mid-Atlantic U.S.	48	4.3
Florida	14	1.2
Maryland	7	0.6
Virginia	5	0.4
Texas	5	0.4
North Carolina	4	0.3
Georgia	3	0.3
West Virginia	2	0.2
Washington, DC	2	0.2
Kentucky	2	0.2
Tennessee	1	0.1
Delaware	1	0.1
Louisiana	1	0.1
Arkansas	1	0.1
Western U.S.	21	1.9
California	14	1.2
Colorado	2	0.2
Wyoming	1	0.1
Arizona	1	0.1
New Mexico	1	0.1
Nevada	1	0.1
Oregon	1	0.1

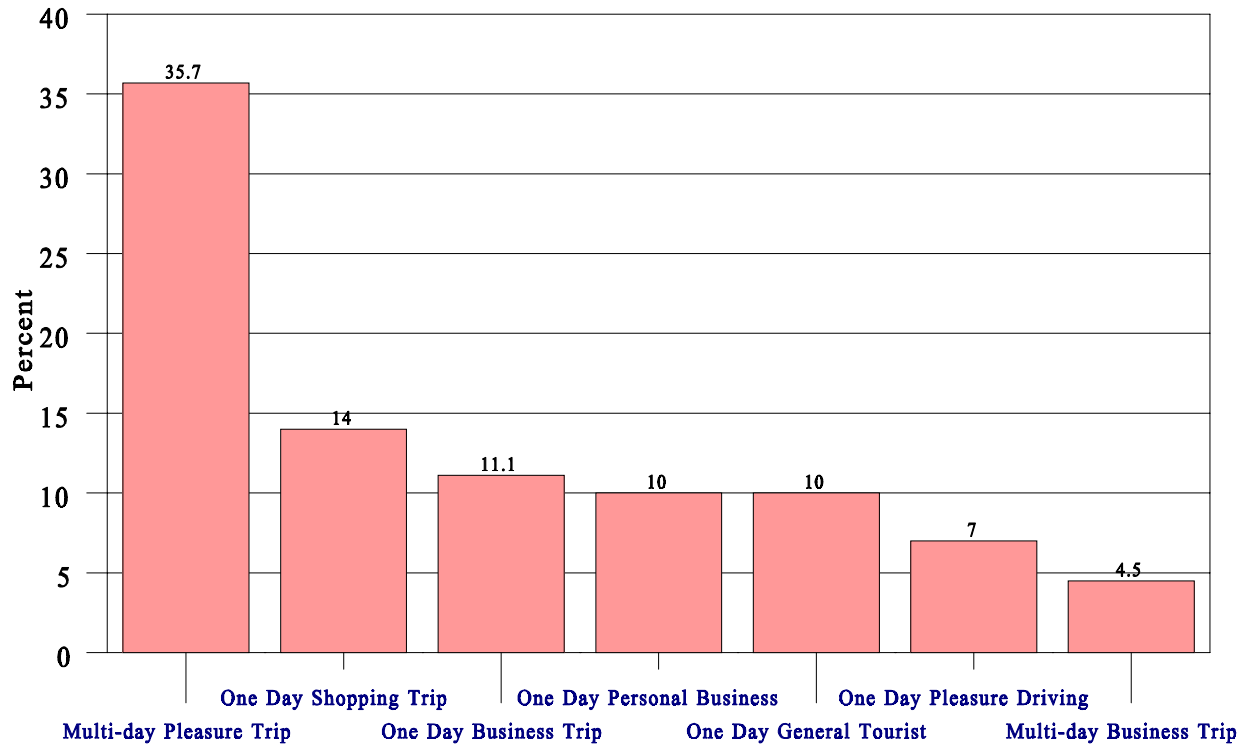
How Do People Use the Ferries?

We know from Figure 7 that 21.9% of the Ferries passengers are crossing the Lake for business reasons. At least 6.3% of the Ferries passengers are commuters, and probably more since we did not sample pedestrian passengers who may have cars parked at either side of crossings. Further, 11.1% are people on a single day business trip. This too is a low estimate since we did not sample business vehicles or delivery trucks. Finally, 4.5% are on a multi-day business trip.

Conversely, 78.1% of the Ferries passengers were using the Ferries for pleasure reasons. Some (35.7%) were using the ferries while on a multi-day vacation. Multi-day vacationers account for as many as 196,000 trips across the Lake annually. Most of these multi-day vacationers (71%) were nonresidents of the Lake Champlain region. Presumably, most of these multi-day visitors had more than one purpose and more than one goal for their trip, and crossing the Lake on the ferries was but one component of a larger agenda. More ferries passengers, however, (42.5%) were crossing the Lake on a one day pleasure excursion. These single day excursions accounted for as many as 235,000 trips on the ferries annually. Presumably, these passengers had a more singular purpose in mind for their trip. Indeed, the day travelers listed an average of 1.78 activities in which they participated on their trip, whereas the overnight travelers listed an average of 2.92 activities that they engaged in on their trip ($F = 72.43$; $p < .00$). What then is the purpose of the day traveler's trip across the Lake? Cross-tabulating the data from Figure 7 with activity data in Figure 13 can give an indication of the purpose of one-day pleasure travelers trip on the ferries.

Based on this cross-tabulation, 4 categories of day trippers could be identified. Obviously, day trippers do use the ferries to engage in travel activities like hiking, attending concerts or festivals, or for visiting tourist attractions on the other side of the Lake. A conservative guess from the cross-tabulation would suggest that at least 25% of the day trippers use the ferries for these purposes. This means that roughly 10% of the sample used the ferries to facilitate day trips devoted to traditional tourist activities. Another common use of the ferries by day travelers is for cross lake shopping excursions. One third of the day travelers (33%) said they engaged in shopping as a travel activity. This means that approximately 14% of the ferries passengers or 77,000 people annually cross the ferries to go shopping in places like Plattsburgh, Burlington, or perhaps Lake George. A third category was derived from looking at the "other" activity category. One fourth of the day trippers (25%) offered an other activity option. Most included personal business items such as visiting medical facilities, dropping off people at the airport or train station, or visiting friends or family. Consequently, another 10% of the sample used the ferries for miscellaneous personal reasons.

A final popular activity among day users of the ferries was "pleasure driving" (17% of the sample). These may be the people who take the ferry as an attraction in itself to get out on the Lake or to watch the sunset, etc. This is corroborated by the fact that a number of Vermont residents who rode the ferry listed a Vermont location as the main destination of their trip (31% of local Vermont residents). Similarly, a number of New York residents who rode the ferry listed a New York location as the main destination of their trip (30% of the New York residents). In all three cases, these figures comprised roughly 7% to 8% of the ferries passengers. Therefore, we can estimate that the Ferries accommodates roughly 40,000 visitors annually who ride the ferries as a pleasure excursion in itself. Figure 22 shows a revised distribution of uses on the Lake Champlain Ferries.



CHAPTER 2

COMPARING RIDERS ON THE THREE FERRIES

The results documented above report aggregate statistics for riders of all three Ferries. There are many reasons, however, to assume that Ferries passengers at different crossings differ. One reason is the distribution of use between the three Ferries. The Grand Isle/Plattsburgh Ferry is open year round, and receives 70% of the passengers who ride the Ferries during the summer and fall months. The results above may therefore be skewed toward the profile and opinions of the Grand Isle/Plattsburgh rider. Another reason is the length of the trip. The Grand Isle/Plattsburgh ferry takes about 10 to 15 minutes to cross, the Charlotte/Essex Ferry takes about 20 to 25 minutes to cross, and the Burlington/Port Kent ferry takes more than an hour to cross. Consequently, one would expect the Burlington/Port Kent ferry to carry all tourists and few, if any, commuters. Conversely, one would expect more commuter and business traffic on the other two ferries. Another obvious reason for differences is the routes taken by each ferry. The Grand Isle/Plattsburgh ferry connects the two major centers of commerce in the Vermont and Upstate New York. The other ferries connect the central Lake Champlain region further to the south. Passengers at each of the crossings therefore are likely to differ in the destinations and tourist attractions they are visiting. They may also possibly differ in their travel activities and travel interests. This chapter, therefore, compares the responses of passengers at each of the three crossings using analysis of variance to test for statistically significant differences

The results confirm that passengers who ride the Burlington/Port Kent ferry are more often tourists on either a day excursion or a multi-day vacation. Table 2.1 shows that 93% of the Burlington/Port Kent passengers were pleasure travelers, while conversely only 7% were business travelers. On the other two ferries, roughly three-fourths were pleasure travelers and one-fourth were business travelers or commuters. Similarly, the Burlington/Port Kent ferry carried more people on multi-day vacations than the other two crossings. Two thirds (68%) of the Burlington/Port Kent passengers were vacationers, while third of the passengers at the other two crossings were vacationers.

Experience on Ferries. When asked how respondents first learned of the Ferries, Burlington/Port Kent passengers were significantly less likely than the others to say they live in the area (Table 2.1)¹. Only 21% of the Burlington/Port Kent riders lived locally, while half of the Charlotte/Essex and Grand Isle/Plattsburgh passengers were local residents. Additionally, one fourth of the Burlington/Port Kent passengers (26%) first learned of the Ferries by looking at road maps, suggesting that most of these people were nonresidents unfamiliar with the Lake Champlain area. Similarly, significantly more of the Burlington/Port Kent passengers (7%) first learned of the Ferries

¹In the tables that follow, "ns" under the F column means there were no significant differences between the mean scores of each category.

through regional traveler guidebooks than other passengers. These Burlington/Port Kent passengers (approximately 5000 annually) who learn of the Ferries through information targeted to tourists are also nonresident vacationers who are unfamiliar with the region.

Table 2.1. Comparison of experiences among passengers at the three different crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Pleasure Trip?				
% Tourist (vs. business)	76% ^a	93% ^b	77% ^a	8.03
% Multi Day Vacation	36% ^a	68% ^b	42% ^a	20.64
First Learn About Ferries?				
Ferries Brochure	4%	8%	4%	ns
Friends or Family	25%	25%	24%	ns
Media Advertising	1%	2%	1%	ns
I Live Here	55% ^a	21% ^b	49% ^a	22.71
Highway Maps	8% ^a	26% ^b	11% ^a	15.81
Highway Signs	1%	3%	3%	ns
Travel Guides	1% ^a	7% ^b	1% ^a	13.31
Other	3%	4%	4%	ns
First ride Ferries?	1978 ^a	1986 ^b	1979 ^a	16.17
How many times have you ever been on:				
Grand Isle	4.71 ^a	1.30 ^b	2.81 ^c	104.92
Burlington	1.19 ^a	1.64 ^b	1.32 ^a	3.90
Charlotte	.94 ^a	.68 ^a	2.95 ^b	115.60
How often do you ride:				
Grand Isle	3.26 ^a	1.50 ^b	2.30 ^c	37.43
Burlington	1.08	1.33	1.16	ns
Charlotte	1.15 ^a	1.23 ^a	2.43 ^b	28.02
# of adults	1.87 ^a	2.59 ^b	2.01 ^a	15.59
# of Children	.40 ^a	.71 ^b	.51 ^a	3.63
Evaluation of Facilities and Services on Ferries				
Courtesy	4.20 ^a	4.29 ^{ab}	4.40 ^b	5.09
Cleanliness (dock)	4.04	4.05	4.18	ns
Cleanliness (boat)	4.12 ^a	4.15 ^{ab}	4.29 ^b	4.09
Food	3.61 ^a	3.75 ^a	3.29 ^b	7.70
Restrooms	3.69	3.76	3.53	ns
# of Minutes at landing	11.73 ^a	20.55 ^b	9.42 ^c	50.44
Radio Signs	46% ^a	29% ^b	48% ^a	6.17

Radio Listen	7% ^a	4% ^b	7% ^a	ns
Radio Help	75%	83%	71%	ns

Note. Letters denote significant differences between categories at the .05 level using a Tukey HSD difference test.

As expected, respondents had the most experience riding the Ferry on which they were interviewed. Grand Isle/Plattsburgh passengers had more experience on that Ferry than the other two and rode the Grand Isle/Plattsburgh ferry more frequently than the other two. Similarly, those people surveyed on the Burlington/Port Kent had more experience at that crossing. The table shows, however, that Charlotte/Essex respondents rode the Grand Isle/Plattsburgh Ferry just as frequently as they rode the Charlotte/Essex ferry. The converse was not true for Grand Isle/Plattsburgh respondents. They made much less frequent use of other ferry crossings.

Table 2.1 shows that groups size was significantly larger among Burlington/Port Kent passengers. Average group size was 2.59 people at this crossing while the average group size at the other two crossings was 2 or fewer people. Further, the Burlington/Port Kent crossing had more children among its passengers. There was an average of .71 children per party at this crossing while there was an average of .50 or less children at the other two crossings. This suggests that the Burlington/Port Kent crossing contains more family groups traveling on one day pleasure trips or multi-day vacations, whereas the other two crossings caters to a larger proportion of business travelers who may desire a quicker east/west transportation link through the area.

Table 2.1 shows that the Charlotte/Essex passengers evaluated the Ferry's services higher than passengers at the other crossings. Charlotte/Essex respondents experienced a shorter wait time at the Ferry landing (9.42 minutes), rated employee courtesy higher, and rated the cleanliness of the boat higher. They rated the food lower because there are no on-board or landing food services.

Finally, Burlington/Port Kent passengers were significantly less likely to notice the travel information signs advertising the radio broadcast at the Ferry Landings. Less than a third (29%) of these passengers notices the signs while almost half of the passengers at the other two landings noticed these signs.

Travel Experience. Table 2.2 shows a reduced number of indicators for travel information and travel activities. These reduced categories were derived from factor analysis (see Methods in Appendix A). This Table confirms that the Burlington/Port Kent passengers were more often nonresident tourists to the area. These passengers were more frequently consumers of information. They made more frequent use of travel guidebooks, attractions brochures, maps, and AAA guides in planning their trip than passengers at the other two crossings. The Burlington/Port Kent passenger talked with more people to get word-of-mouth referrals in planning their trip. Finally, they made slightly greater use of media advertising and feature stories in newspapers or magazines to help plan their trip, although the differences were not significantly different.

While traveling in the area, Burlington/Port Kent passengers also relied more heavily on travel information sources than passengers at the other two crossings. These passengers continued to make

more frequent use of travel guidebooks. They also made more frequent use of chamber of commerce information sources and welcome centers. They were more likely to consult with friends in the area and local newspapers for travel information. Finally, they more often would ask for help from gas station attendants or hotel clerks.

Table 2.2. Comparison of travel experiences between passengers at the three Ferry crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Sources of Information to Plan Trip				
Travel Guides	.46a	1.75b	.75c	56.70
Media ads or stories	.14	.17	.10	ns
Computer Sources	.04	.05	.05	ns
Travel Agents/Toll Free #s	.03	.07	.02	ns
Word of Mouth	.20a	.35%b	.21%a	5.97
Source of information used during trip:				
Chamber/Welcomes Centers	.05a	.20b	.10ab	10.79
Travel Guides	.38a	1.11b	.56c	47.30
Friends/ Local News	.16	.28	.21	4.35
Locals Service Employees	.09a	.21b	.09a	7.57
Accommodations Used:				
Hotel/Motel	31%a	42%b	29%a	ns
B&B	2%	4%	3%	ns
Friend/Relative	31%a	13%b	25%ab	5.16
Vacation Home	7%ab	1%a	11%b	3.47
Rented Cabin	1%	1%	5%	ns
Resort	1%	3%	3%	ns
Condo	1%a	5%b	0%a	5.93
Campground	9%a	26%b	8%a	10.30
Other	3%	1%	7%	ns
Activities:				
Outdoor-Water	.21a	.37b	.36b	6.89
Outdoor-Land	.24a	.64b	.39c	22.87
General Tourist	.73a	1.67b	.95c	34.49
Special Events	.17	.15	.22	ns
Expenditures:				
Transportation	64.19a	167.31b	80.18a	8.55
Food	72.60a	160.08b	122.13b	14.56
Lodging	61.35a	192.58b	113.52a	19.00
Retail	81.02	153.29	88.84	ns
Entertainment	45.30	88.22	48.75	ns

<u>Other</u>	<u>20.79</u>	<u>13.63</u>	<u>6.60</u>	<u>ns</u>
Total	345.25	775.11	460.02	

Note. Letters denote significant differences between categories at the .05 level using a Tukey HSD difference test.

Because there was a greater proportion of multi-day vacationers on the Burlington/Port Kent Ferry (approximately two thirds of the passengers), these respondents also made proportionately greater use of overnight accommodations than passengers at the other two crossings. Among those who used overnight accommodations during their trip (350 people in the Grand Isle/Plattsburgh sample, 76 people in the Burlington/Port Kent sample, and 123 people in the Charlotte Essex sample) Burlington/Port Kent riders were more likely to stay at rental condominium units. These passengers were also significantly more likely to be camping in the area than passengers on the other two Ferries. Further, a greater proportion of Burlington/Port Kent riders stayed in hotels than the other two crossings, although the differences just missed being significant at the .05 level. Conversely, they were significantly less likely to stay with friends or relatives in the area, and less likely to stay in vacation homes. These latter two findings indicate that proportionately more Burlington/Port Kent riders are nonresidents with fewer family or property ties to the region.

Because more Burlington/Port Kent passengers were tourists, they tended to participate in tourist related activities more frequently than passengers on the other two Ferries. They were more likely than passengers on the other two Ferries to participate in land-based outdoor activities such as hiking, outdoor sports (golf, tennis, etc.), and watching wildlife. The Burlington/Port Kent passengers were also more likely to engage in general tourist activities like pleasure driving, visiting museums and historic sites, shopping, factory tours, and arts and crafts events. Conversely, the Grand Isle Plattsburgh passengers were least likely to engage in land-based outdoor activities, general tourist activities, and water-based outdoor activities like swimming or fishing.

Finally, the Burlington/Port Kent passengers spent more money during their trip (average total = \$775.11) while the Grand Isle/Plattsburgh passengers spent less money on their trip (average total = \$345.25). Burlington/Port Kent passengers spent more money on transportation (\$167.31) and more money on lodging (\$192.58) suggesting that more of these people were nonresidents of the Lake Champlain region. They also spent more money on food (\$160.08), although not significantly more than Charlotte/Essex passengers. Passengers on each of the three Ferries did not differ in their retail purchases, entertainment, and other expenditures.

Trip Destinations. As expected, one's choice of Ferry crossing is partially related to one's trip destination. What is perhaps more notable about Table 2.3, however, is the relative lack of significant differences across all destinations. Table 2.3 shows a proximity effect. People traveling to the Stowe, Waterbury, or Mad River Valley region of Central Vermont were more likely to take the Burlington Ferry, while passengers traveling to Plattsburgh were obviously more likely to take the Grand Isle/Plattsburgh Ferry. Similarly, people traveling to the Ticonderoga area, the Central Adirondack region of Indian Lake or Blue Mountain Lake, and the Lake George region were more likely to take the Charlotte/Essex Ferry. Finally, passengers traveling to the Lake Placid and Saranac Lake region were more likely to take the Burlington/Port Kent Ferry.

Those few people traveling to more distant places in Vermont (Southern Vermont, South Central Vermont, and the Northeast Kingdom) did not differ in their crossing preferences. What is perhaps

Table 2.3. Comparison of travel destinations between the three Ferry crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Main Travel Destinations				
Burlington	45%	44%	50%	ns
Central VT	6% ^a	15% ^b	9% ^{ab}	5.87
VT Capitol	2%	5%	4%	ns
South Central VT	2% ^a	3% ^b	4% ^b	ns
South VT	2%	3%	2%	ns
NE Kingdom	2%	2%	1%	ns
Plattsburgh	35% ^a	18% ^b	18% ^{ab}	15.61
Central Adirondacks	2% ^a	2% ^{ab}	5% ^b	4.07
Ticonderoga	1% ^a	5% ^b	5% ^b	13.76
North Adirondacks	8% ^a	23%	14%	11.44
South Adirondacks	2% ^a	9% ^b	5% ^b	8.93
Passing Through	20% ^a	30% ^b	21% ^a	5.31
Places Visited during trip:				
Shelburne Museum	18%	19%	24%	ns
Ft Ticonderoga	13%	16%	13%	ns
Great Escape	11%	9%	8%	ns
Clinton Co. Mus.	3%	1%	2%	ns
Kent De Lord	5% ^a	4% ^{ab}	1% ^b	2.97
Ausable Chasm	18% ^a	31% ^{ab}	19% ^a	4.04
Crown Point	7%	6%	9%	ns
High Falls Gorge	8% ^a	16% ^b	5% ^{ab}	4.85
Alice T. Miner	4%	2%	3%	ns
Santa's Workshop	11%	17%	11%	ns
Ben & Jerry	16%	27%	24%	4.36
Church St. Marketplace	21%	20%	23%	ns
Lake Placid	16% ^{ab}	31% ^a	22% ^b	5.96
VT Teddy Bear	9%	19%	16%	5.00
Christmas Loft	6%	3%	8%	ns
Lake Cruises	8%	18%	15%	5.65

Note. Letters denote significant differences between categories at the .05 level using a Tukey HSD difference test.

most noticeable is the lack of difference between the 3 crossing in people traveling to Burlington. People traveling east were just as likely to list Burlington as their main destination at all 3 Ferry

crossings. This may be related to differences in the geographic distribution of attractions between Vermont and New York. On the New York side of the Lake, attractions are evenly scattered at up and down the Lake. Travel distances between Plattsburgh, Lake Placid, Ausable Chasm, Ticonderoga, and Lake George are not inconsequential. On the Vermont side, the major attractions are concentrated more in the Burlington region. Therefore, most of the people traveling east on any of the three Ferry crossings wind up traveling to, or through Burlington, whereas people traveling west may head south, west, or north depending on which crossing they choose.

This is confirmed in part by differences in the attractions that passengers visited compared across the three Ferries. For the most part, the Vermont attractions that passengers visited did not differ by Ferry crossing. There were no differences among passengers in their frequency of visitation to the more high profile Vermont attractions - Shelburne Museum and Church Street Marketplace. There was also no difference among passengers who visited the Christmas Loft along Shelburne Road. Burlington/Port Kent passengers, however, were more likely to visit Ben & Jerry's ice cream factory, Vermont Teddy Bear Factory, and go on lake cruises. Passengers traveling west also showed a proximity effect in the crossing that they chose. Grand Isle/Plattsburgh passengers were more likely to visit the Kent de Lord House, and passengers to Ausable Chasm and High Falls Gorge were more likely to take the Burlington/Port Kent Ferry. The southern Lake Champlain area attractions, however, did not differ by Ferry crossings. There were no differences in passenger choice of crossing among visitors to Ft. Ticonderoga, the Great Escape, and Crown Point. Further, there were no differences in passenger choice of crossing among visitors to Clinton County Museum, the Alice T. Miner Museum, and Santa's workshop. It may be that vacationers to the New York Adirondacks eventually travel to most of the major attractions in the Lake Champlain region despite the Ferry crossing they choose.

Interest in Specialty Travel. There were only slight differences among passengers at the three Ferry crossings in their interest in various forms of specialty travel. Table 2.4 shows that passengers on the Charlotte/Essex Ferry were most interested in heritage travel, while Burlington/Port Kent riders were most interested in factory tours. Passengers on the Grand Isle/Plattsburgh Ferry were least interested in these two types of travel. Passengers at the different crossings did not differ in their interest in any of the other types of specialty travel (Table 2.4).

Table 2.4. Comparisons of respondent interest in specialty travel among the three Ferry crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Heritage	2.46a	2.62a	2.74b	4.72
Ecotourism	2.07	2.15	2.27	ns
Watchable Wildlife	2.76	2.80	2.78	ns
Factory Tours	1.81	2.06	1.96	3.52
Ag Tourism	1.86	1.80	1.94	ns
Sports Tourism	2.36	2.37	2.30	ns
Gambling	1.95	2.01	1.73	ns

Note. Letters denote significant differences between categories at the .05 level using a Tamehane T2 difference test.

Evaluation of the Region's Travel Related Services. Overall, there was little variation in the way respondents evaluated the travel related services in the Lake Champlain region. Average rating were typically in the "very good" range with relatively small standard deviations. The Charlotte/Essex passengers, however, were slightly more favorable than passengers at the other two crossings in their ratings of the quality of roads, local hospitality, and the variety of things to do in the area (Table 2.5). The Grand Isle/Plattsburgh riders were slightly less favorable in the ratings of these services.

Table 2.5. Comparison of respondent evaluations of the quality of the regions travel related services among the three Ferry crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Roads	3.17a	3.41a	3.41b	6.51
Hospitality	3.70a	3.81ab	3.90b	4.51
Value for money	3.23	3.22	3.35	ns
Variety of activities	3.62a	3.82a	3.82b	5.36
Travel Info	3.63	3.82	3.74	ns
Signs	3.62	3.53	3.72	ns
Scenic Overlooks	3.91	4.06	4.06	ns

Note. Letters denote significant differences between categories at the .05 level using a Tamehane T2 difference test.

Differences in Socio-Economic Profile. Finally, Table 2.6 shows differences in the socio-economic profile of passengers on the different Ferries. The Grand Isle/Plattsburgh passengers were younger on average (41 years old) than passengers on the other two Ferry crossings. Passengers on the Charlotte/Essex Ferry were better educated than passengers on the other two Ferries. Finally, passengers on the Burlington/Port Kent Ferry typically lived in more urban environments than passengers on the other two Ferries. Again, this latter finding confirms that Burlington/Port Kent passengers tend to be the nonresident vacationer who may be coming to the region in part to escape a more urban lifestyle.

Table 2.6. Comparison of socio-economic characteristics among passengers at the three Ferry crossings.

	Grand Isle Plattsburgh	Burlington Port Kent	Charlotte Essex	F
Gender (female)	42%	47%	41%	ns
Age	41	46	45	8.36
Education	4.45a	4.23a	4.61b	3.77
Income	4.19	4.04	4.32	ns
Kids	.82	.63	.77	ns

Residence	2.82a	3.29b	2.82a	5.22
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Note. Letters denote significant differences between categories at the .05 level using a Tukey HSD difference test.

In summary, the results confirm that Burlington/Port Kent passengers are more likely to be a pleasure traveler, more likely to be a nonresident vacationers, and less likely to be business travelers or commuters than passengers on the other two Ferries. This comes as no surprise since this ferry takes more than an hour to cross the lake and is therefore more like a pleasure cruise on the Lake. Conversely, the Grand Isle/Plattsburgh crossing was used for more utilitarian purposes by its passengers. These passengers rode the Ferry more frequently, rode in smaller groups, evaluated the Ferry services and the regions travel related services lower, spent less money, used information sources less frequently, and visited tourist attractions less frequently than passengers on the other two Ferries. Ferries passengers at Grand Isle/Plattsburgh may have a more singular purpose to their trips, while passengers at the other crossings may be more likely to be pleasure drivers or vacationers with more general purposes or multiple purposes to their trips. The Charlotte/Essex passengers were generally more like the Grand Isle/Plattsburgh passengers. One notable difference, however, was they were a better educated group who generally evaluated the Ferry services and tourist related services of the region higher. The landings at the Charlotte/Essex Ferry are more out of the way and this crossing is arguably the more scenic crossing of the three. Therefore, the Charlotte/Essex passenger may be less utilitarian in choosing this crossing, and may be choosing this route because of leisure related motives.

CHAPTER 3

SHORT DISTANCE DAY EXCURSIONS ON THE FERRIES

The Lake Champlain Ferries data offer an opportunity to look at the travel behavior of local residents who take short distance pleasure trips. Most economic impact models that estimate travel activity to a region or state limit the definition of tourist activity to those who travel 100 miles or more from their primary residence. These data, however, show that a substantial amount of Ferries passengers are people (42.5% or 235,000 people annually) who use this transportation link to facilitate short pleasure excursions that are generally less than 100 miles from their homes. This chapter therefore analyzes these short day excursions in three ways. First, it compares the questionnaire responses of day travelers with the responses of overnight travelers who are using the Ferries. Second, the study will compare the questionnaire responses of people who live in the Lake Champlain Valley region (80% of whom were day travelers) with the responses of nonresidents of the Lake Champlain Valley region (33% of whom were day travelers). Finally, the study will compare the responses of Vermont residents of the Lake Champlain Valley with the responses of New York residents of the Lake Champlain Valley region.

Day Travelers vs. Overnight Travelers

Experience on the Ferries. The data offer few surprises about day travelers and overnight travelers knowledge of the Ferries and experiences riding the Ferries. Naturally, a majority of day travelers (61%) first learned of the Ferries because they live in the area and have always had a general awareness of the Ferry's presence (Table 3.1). Another sizeable proportion of day travelers (21%) said they first learned of the Ferries from friends or family members. Otherwise, day users rarely found out about the Ferries from printed sources like brochures, advertising, or travel guides. Conversely, the overnight traveler was less likely than the day traveler to have first learned about the Ferries by living in the area (31%), but more likely to learn of the Ferries from friends or family members (32%). Further, since most overnight travelers were nonresidents of the area and were probably less familiar with the area, they were more likely to learn of the Ferries through highway maps (19%) and through regional travel guides (4%) than were day travelers.

Naturally, since most day travelers live in the Lake Champlain region, they had significantly more experience riding the Ferries (Table 3.1). They had been riding the Ferries for an average of 20 years, while overnight travelers had been riding the Ferries for an average of 13 years. Similarly, day travelers had been passengers on each of the Ferries more times than overnight travelers, and rode the Ferries more frequently than overnight passengers. The one exception was the Burlington/Port Kent crossing. There was not a significant difference between day travelers and overnight travelers in how frequently they rode this ferry. As shown in Table 2.1, more than two thirds of the Burlington/Port Kent passengers are overnight vacationers, which again reinforces the point that this crossing is most often used by nonresident vacationers, while the other two crossings are more often used by local day travelers.

Table 3.1 shows that there was no differences in the group size of day travelers and overnight travelers. As expected, more than half of the overnight travelers were using the Ferries to travel to a more distant destination, while only 17% of the day travelers were traveling out of the Lake Champlain region.

Table 3.1. Comparison of knowledge of, and experience on the Ferries among day travelers and overnight travelers in the Lake Champlain region.

	Day Trip	Overnight	F
First Learn About Ferries?			
Ferries Brochure	5%	5%	ns
Friends or Family	21%	32%	13.85
Media Advertising	2%	1%	ns
I Live Here	61%	31%	83.84
Highway Maps	6%	19%	38.20
Highway Signs	2%	2%	ns
Regional Travel Guides	1%	4%	10.61
Other	1%	3%	ns
First ride Ferries?	1976	1983	46.90
How many times have you ever been on:			
Grand Isle	4.23	2.84	53.68
Burlington	1.44	1.02	15.87
Charlotte	1.58	0.90	26.23
How often do you ride:			
Grand Isle	2.98	1.97	51.20
Burlington	1.20	1.11	ns
Charlotte	1.52	1.24	3.06
# of adults	2.14	2.13	ns
# of Children	0.49	0.62	ns
Beyond Champlain Valley	17%	52%	134.32
Facilities and Services on Ferries			
Courtesy	4.24	4.26	ns
Cleanliness (dock)	4.05	4.05	ns
Cleanliness (boat)	4.13	4.14	ns
Food	3.55	3.60	ns
Restrooms	3.60	3.74	3.27
Radio Signs	46%	39%	3.21
Radio Listen	8%	5%	3.77
Radio Help	82%	76%	ns

There were few differences in the way day travelers and overnight travelers evaluated the facilities and services on the Ferries. The only exception was that multi-day travelers rated the restroom facilities higher than day travelers. This may be because Burlington/Port Kent riders are more often overnight travelers, and because the crossing takes more than an hour, these people may be the ones who more frequently have an occasion to use the restroom facilities on the Ferries.

Finally, Table 3.1 shows that day travelers using the Ferries more frequently notice the signs at the Ferries advertising the travel information radio broadcast, and more frequently listen to this radio broadcast when riding the Ferries than do overnight passengers. This suggests that the day traveler who rides the Ferries more frequently than overnight travelers, may have more occasion to notice the signs and will therefore tune in out of curiosity. The overnight traveler, who rides the Ferries less frequently, appears to be missing the signs more often and therefore tuning in less frequently. This suggests the need for better placement of the signs and/or a more visible design so that more of the one-time users of the Ferries will notice them.

Travel Experience. Table 3.2 supports the notion that day travelers have a more singular purpose that motivates their trip, while overnight travelers are expecting a multitude of varying experiences. Specifically, overnight travelers make more frequent use of information sources to plan their trip, make more frequent use of information sources while traveling in the area, participate more frequently in tourist related activities while traveling, and, as expected, spend considerably more money while traveling.

Table 3.2 shows that when planning their trip, overnight travelers make more frequent use of printed travel information resources such as traveler's guidebooks, maps, brochures, and AAA guides. They also pay more attention to various sources of media advertising, and printed and broadcast travel features. Finally, overnight travelers use computer resources such as the internet and CD-Roms to help plan their trip. The overnight traveler also consumes more information while traveling. They consult with local Chambers of Commerce and stop at welcome centers more frequently than day travelers. They continue to make more frequent use of printed travel information sources as they travel. They rely more heavily on referrals from friends and local news sources during their trip. Finally, overnight travelers are more willing to stop and ask for direction from gas station attendants, hotel clerks, etc. than are day travelers.

The overnight traveler also participates in a greater variety of travel related activities during their trip than do day travelers. Overnight travelers participated more frequently in all categories of activities including water-based outdoor activities, land based outdoor activities, general tourist activities, and special events. As mentioned above, the day traveler listed an average of 1.78 activities (out of 16) that they engaged in during their trip, while the overnight traveler listed an average of 2.92 activities. This number is probably influenced by the 25% of the day travelers who listed some form of personal business (medical appointment, airport, train station, etc.) as the reason for their trip. So not all day travelers would think of themselves as tourists. Further, the length of the day travelers trip limits their range of activities.

Finally, overnight travelers spent considerably more money during their trip than day travelers. The overnight traveler spent significantly more money than the day traveler in all categories, including transportation, food, lodging, retail, entertainment, and other miscellaneous expenditures (Table 3.2). In spite of the 33% of the day travelers on a shopping excursion, the overnight traveler because of the longer duration of their trips outspent the day traveler by almost 3 to 1.

Table 3.2. Comparison of travel experiences among day travelers and overnight travelers.

	Day Trip	Overnight	F
Sources of Information to Plan Trip			
Travel Guides	.44	1.05	78.68
Media Advertisement/Story	.20	.10	9.10
Computer Sources	.02	.08	14.36
Travel Agent/1-800	.03	.05	ns
Word of Mouth	.22	.24	ns
Source of information used during trip:			
Chamber/ Welcome Center	.07	.12	5.74
Travel Guides	.41	.75	38.70
Friends/ Local News	.17	.24	3.86
Local Service Employees	.08	.14	6.85
Activities:			
Outdoor - Water	.16	.52	60.95
Outdoor - Land	.26	.54	35.43
General Tourist	.88	1.26	23.87
Special Events	.18	.26	5.35
Expenditures:			
Transportation	42.88	119.99	20.23
Food	59.81	142.93	42.05
Lodging	36.29	146.70	53.49
Retail	63.92	133.43	9.73
Entertainment	29.12	80.30	14.41
<u>Other</u>	<u>4.82</u>	<u>32.34</u>	5.77
Total	236.84	655.69	

Travel Destination. There were no surprises in the main travel destinations reported by day travelers and overnight travelers. Day travelers were significantly more likely to list the two main metro areas of the region, Burlington and Plattsburgh, as their primary travel destination (Table 3.3). Half of the day travelers (52%) said they were heading to Burlington, while over a third (36%) said they were traveling to Plattsburgh. Conversely, only 30% of the overnight travelers listed Burlington as their

main travel destination, and 23% listed Plattsburgh. Overnight travelers were more likely to list more distant places as their main travel destination including the Central Vermont region of Stowe, Waterbury, and the Mad River Valley; the South Central Vermont region of Rutland and Killington; Southern Vermont region of Bennington and Brattleboro; the Northern Adirondack region of Lake Placid and Saranac Lake; and the Lake George region of the Southern Adirondacks.

Table 3.3. Comparison of travel destinations among day travelers and overnight travelers.

	Day Trip	Overnight	F
Main Travel Destinations			
Burlington	52%	30%	40.53
Central VT	7%	11%	5.25
VT Capitol	3%	3%	ns
South Central VT	1%	5%	10.79
South VT	1%	3%	4.41
NE Kingdom	2%	2%	ns
Plattsburgh	36%	23%	15.82
Central Adirondacks	2%	3%	ns
Ticonderoga	2%	3%	ns
North Adirondacks	6%	18%	28.70
South Adirondacks	2%	5%	4.28
Passing Through	9%	40%	128.19
Places Visited during trip:			
Shelburne Museum	25%	18%	4.11
Ft Ticonderoga	14%	14%	ns
Great Escape	12%	8%	2.86
Clinton Co. Mus.	3%	3%	ns
Kent De Lord	5%	4%	ns
Ausable Chasm	22%	22%	ns
Crown Point	9%	6%	ns
High Falls Gorge	8%	11%	ns
Alice T. Miner	4%	3%	ns
Santa's Workshop	14%	12%	ns
Ben & Jerry	20%	23%	ns
Church St. Mktpl.	30%	16%	16.48
Lake Placid	19%	25%	3.31
VT Teddy Bear	15%	13%	ns
Christmas Loft	7%	6%	ns
Lake Cruises	13%	9%	ns

Day travelers and overnight travelers did not differ on their visitation to most of the area's tourist attractions. Day travelers were just as likely as overnight visitors to visit attractions like Ft. Ticonderoga, Ausable Chasm, Crown Point, the Alice T. Miner Museum, Ben & Jerry's Ice Cream

Factory, and the Vermont Teddy Bear Factory. There were four exceptions. Day travelers were more likely than overnight travelers to visit Shelburne Museum, the Great Escape, and the Church Street Market Place. Overnight travelers were more likely than day travelers to visit the Lake Placid Olympic Center. This suggests that Shelburne Museum, the Great Escape, and the Church Street Market Place are among the most visited attractions in the region, they draw a substantial portion of their support from a local clientele. The Lake Placid Olympic Center, however, probably has a much higher profile among nonresident visitors to the region.

Interest in Specialty Travel. There were few differences between day travelers and overnight travelers in their interest in specialty travel. Table 3.4 shows that overnight travelers, who are more often nonresidents of the Lake Champlain region are more interested in visiting historic sites and museums, and more interested in visiting places where they can view wildlife than are day travelers. Conversely, day travelers are more interested in gambling than are overnight travelers. One would expect to find fewer overnight travelers in the Lake Champlain region who are interested in gambling because there are no gambling opportunities. Similarly, one would expect less interest among day travelers, who tend to be local residents, in heritage tourism and watchable wildlife because these features are perhaps a more common backdrop in the Lake Champlain region.

Table 3.4. Comparison of respondents interest in specialty travel among day travelers and overnight travelers in the Lake Champlain region.

	Day Trip	Overnight	F
Interests in Specialty Travel			
Heritage	2.50	2.65	3.44
Ecotourism	2.08	2.19	ns
Watchable Wildlife	2.73	2.88	3.93
Factory Tours	1.92	1.87	ns
Ag Tourism	1.92	1.86	ns
Sports Tourism	2.34	2.30	ns
Gambling	1.98	1.79	4.13

Evaluation of the Region's Travel Related Services. Table 3.5 shows that day travelers who are more often local residents of the Lake Champlain Valley region rate the quality of the region's roads and rate the hospitality of the local people lower than do overnight travelers who are more often nonresident visitors to the area. Conversely, day travelers feel that the directional signs in the area are more adequate than do the overnight travelers. Part of this latter finding may be related to Vermont's sign law. Local day travelers, who may know their way around fairly well, find the lack of directional signs more appealing than do overnight visitors who may not be as familiar with the region. There were no differences in the way day visitors and overnight visitors rated the variety of things to do in the area, the availability of travel information, the quality of the scenic overlooks, and value of the Lake Champlain region vacation.

Table 3.5. Comparison of respondent's evaluation of the regions travel related services among day travelers and overnight travelers to the Lake Champlain region.

	Day Trip	Overnight	F
Quality of Travel Related Services			
Roads	3.21	3.40	7.80
Hospitality	3.69	3.84	5.86
Value for money	3.22	3.24	ns
Variety of activities	3.69	3.72	ns
Travel Info	3.72	3.72	ns
Signs	3.73	3.61	3.22
Scenic Overlooks	3.98	3.98	ns

Socioeconomic Profile. Finally, the socioeconomic profile of day travelers and overnight travelers differed on three dimensions (Table 3.6). Overnight travelers had significantly higher household incomes than did day travelers. Further, overnight travelers were more likely to reside in a more urban area than were day travelers. Day travelers on the other hand were more often women (50%) than were overnight travelers. This finding is notable because there was a minority of women in the sample (42.1%). In sampling, we approach the driver of the vehicle, and the driver was more often a man in male/female couples. Consequently, where women were sampled, they were more likely to be traveling on a one day trip.

Table 3.6. Comparison of the socioeconomic profile of day travelers and overnight travelers.

	Day Trip	Overnight	F
Gender (female)	50%	41%	5.19
Age	44	43	ns
Education	4.44	4.52	ns
Income	3.99	4.40	9.26
Kids	.74	.82	ns
Residence	2.72	3.18	20.24

Local Residents vs. Nonlocal Residents of the Lake Champlain Valley

A second way of analyzing the short distance traveler in the Lake Champlain region is to compare those who are permanent residents of the Lake Champlain Valley on either the Vermont side or New York side of the Lake with those who are not residents of the Lake Champlain region. The differences between short distance travelers (< 100 miles from home) and long distance travelers (> 100 miles from home) becomes even more apparent when comparing those who live in the Lake Champlain Valley and those who do not. Four out of five local residents (80%) of the region used the Ferries on a day long pleasure trip, while two-thirds of the nonresidents (66%) of the region said they were on a multi-day pleasure trip.

Experience on the Ferries. As in Table 3.1, local residents of the Lake Champlain region primarily first learned of the Ferries through knowledge from having lived in the area (Table 3.7). Three fourths of the local residents (74%) said they first learned of the Ferries because they live in the area and have always known of the Ferry crossings. Conversely, nonresidents of the area were more likely than local residents to first learn about the Ferries through referrals from friends or family (36%), and from travel information sources like Ferries brochures (7%), highway maps (10%), and regional travel guides (3%).

Table 3.7. Comparison of experience on the Ferries among local residents of the Champlain Valley and nonresident visitors to the Champlain Valley.

	Local Residents	Nonresidents	F
First Learn About Ferries?			
Ferries Brochure	2%	7%	16.37
Friends or Family	16%	36%	54.39
Media Advertising	1%	1%	ns
I Live Here	74%	22%	339.14
Highway Maps	2%	10%	5.37
Highway Signs	9%	3%	ns
Regional Travel Guides	0%	3%	19.64
Other	2%	5%	6.68
First ride Ferries?	1974	1986	163.65
How many times have you ever been on:			
Grand Isle	5.39	2.26	380.10
Burlington	1.54	0.92	37.06
Charlotte	1.85	0.79	66.05
How often do you ride:			
Grand Isle	3.84	1.63	268.31
Burlington	1.18	0.99	ns
Charlotte	1.65	1.08	14.39
# of adults	1.80	2.17	19.61
# of Children	.39	.53	3.31
Beyond Champlain Valley	.18	.47	104.30
Radio Signs	50%	39%	10.59
Radio Listen	10%	4%	12.01
Radio Help	71%	77%	ns

Local residents also had considerably more experience riding the Ferries than nonresidents of the area. On average, local residents first rode the Ferries in 1974, while nonresidents first rode the Ferries in 1986 (Table 3.7). As expected, locals had also been on each the three Ferries more often

than nonresidents, and rode the Grand Isle/Plattsburgh and Charlotte/Essex Ferries more frequently. Once again, there was not a significant difference between locals and nonresidents in their frequency aboard the Burlington/Port Kent Ferry. This confirms that the Burlington/Port Kent Ferry is more of a tourist ferry and nonresidents on a multi-day vacation are just as likely to cross at this point as local residents.

Table 3.7 shows that there were significant differences in the group size of local and nonresident passengers of the Ferries. Nonresident passengers traveled in average sized groups of 2.17 people and .53 children, while local resident traveled in average sized groups of 1.80 and .39 children. This difference probably reflects nonresident family vacationers on a multi-day vacation.

As expected, the results also confirm that nonresidents of the region are more likely to be using the Ferries enroute to another destination beyond the Lake Champlain region.

Table 3.7 replicates the finding about who is listening to the travel information radio broadcasts. Local residents are significantly more likely than nonresidents to notice the signs at the landings advertising the radio broadcast, presumably because they make more frequent use of the Ferries. Local residents are also significantly more likely to tune into the radio broadcast out of curiosity about the information that is being broadcast. Finally, there were no significant differences in the way locals and nonresidents evaluated the facilities and services on the Ferries.

Travel Experiences. Table 3.8 tells an even clearer story about differences in the types of information locals and nonresident use to help plan their trips. Nonresidents of the region are more likely to use promotional tourist information such as travel brochures, AAA guides, regional travel guidebooks, highway maps, and specialty guidebooks. They also are more likely to use computer resources like the internet and cd-roms. Locals on the other hand are more likely to use media sources of information such as newspaper, magazine, radio, and TV advertising. Once people are traveling in the region, the nonresident who is less familiar with the region makes much more frequent use of all information sources including printed promotional materials, chamber of commerce information, welcome centers, and advice from friends or local service employees.

Once again, nonresident vacationers to the Lake Champlain region participated in a greater variety of activities during their trip (Table 3.8). They were more likely to participate in all of the activities including water-based outdoor activities, land-based outdoor activities, special events, and general tourist activities like visiting museums, pleasure driving, or factory tours. The only exception was shopping. There were no significant differences between locals and nonresidents in how frequently they went shopping during their trips.

Finally, Table 3.8 also confirms that nonresident passengers on the Ferries spent considerably more money than local residents. Again, because nonresidents were more likely to be on multi-day trips, they spent significantly more money on transportation, food, lodging, retail purchases, and entertainment. The overall ratio of spending by nonresidents was again about 3 to 1.

Table 3.8. Comparisons of travel experiences among local residents and nonresidents of the Lake Champlain region.

	Local Residents	Nonresidents	F
Sources of Information to Plan Trip			
Newspaper ads	7%	4%	5.12
Travel Brochures	8%	21%	24.76
TV/Radio ads	4%	2%	5.47
Travel agent	1%	4%	7.93
Business Contacts	5%	5%	ns
AAA	2%	17%	67.56
Magazine ads	4%	3%	ns
Travel Guides	5%	18%	39.23
Maps	17%	49%	112.44
Specialty Guides	3%	6%	5.72
Word of Mouth	20%	22%	ns
Newspaper story	2%	1%	ns
1-800	0.4%	2%	8.81
Internet	2%	5%	6.60
CD Roms	1%	3%	3.99
Other	22%	20%	ns
Source of information used during trip:			
Chamber/Welcome Center	.04	.12	15.86
Travel Guides	.24	.80	145.93
Friends/Local News	.15	.24	9.34
Local Service Employees	.05	.14	20.35
Activities:			
Outdoor - Water	.14	.45	61.69
Outdoor - Land	.17	.52	75.89
General Tourist	.58	1.21	86.68
Special Events	.14	.23	9.22
Expenditures:			
Transportation	35.54	125.34	29.88
Food	47.57	138.59	57.32
Lodging	26.19	152.40	76.13
Retail	60.91	126.67	9.47
Entertainment	35.09	72.33	7.81
<u>Other</u>	<u>12.35</u>	<u>17.66</u>	ns
Total	217.65	632.99	

Travel Destinations. Data on the main travel destination of local and nonresident passengers on the Ferries tells a slightly different story than did comparisons between day travelers and overnight travelers. Local travelers were significantly more likely to list Burlington as their main travel destination (Table 3.9). They were not, however, more likely to list Plattsburgh as their primary travel destination. Nonresidents were again more likely to list more distant places in Vermont (Stowe/Waterbury, Rutland/Killington, and the Northeast Kingdom) and New York (Ticonderoga, Lake Placid region, and Blue Mtn. Lake) as their primary travel destination. However, Plattsburgh was a less important destination for local travelers (as vs. day travelers) on the Ferries.

Table 3.9. Comparison of travel destinations among local and nonresidents of the Lake Champlain Valley.

	Local Residents	Nonresidents	F
Main Travel Destinations			
Burlington	52%	39%	15.65
Central VT	5%	11%	10.98
VT Capitol	2%	4%	ns
South Central VT	3%	4%	4.61
South VT	2%	5%	ns
NE Kingdom	1%	3%	4.32
Plattsburgh	31%	30%	ns
Central Adirondacks	2%	4%	4.78
Ticonderoga	1%	4%	5.06
North Adirondacks	6%	18%	33.55
South Adirondacks	2%	4%	ns
Places Visited during trip:			
Shelburne Museum	19%	20%	ns
Ft Ticonderoga	13%	16%	ns
Great Escape	14%	6%	11.37
Clinton Co. Mus.	2%	3%	ns
Kent De Lord	5%	4%	ns
Ausable Chasm	19%	23%	ns
Crown Point	8%	7%	ns
High Falls Gorge	7%	10%	ns
Alice T. Miner	4%	3%	ns
Santa's Workshop	13%	10%	ns
Ben & Jerry	16%	23%	6.51
Church St. Mktpl.	24%	19%	3.50
Lake Placid	16%	24%	6.63
VT Teddy Bear	11%	15%	ns
Christmas Loft	7%	6%	ns
Lake Cruises	10%	12%	ns

There were few differences between locals and nonresidents in their frequency of visiting area attractions. Locals residents were more likely to visit The Great Escape and Church Street Marketplace, while nonresidents were more likely to visit Ben & Jerry's Ice Cream Factory and the Lake Placid Olympic Center (Table 3.9). The remaining sites, however, attracted an equal mix of local Champlain Valley residents and nonresidents of the region.

Travel Interests, Evaluation of Area Services. There were no significant differences in local and nonresident interest in specialty travel. The differences in passenger evaluation of facilities and services in the region mirrored Table 3.5. Local residents were less impressed by the quality of the regions roads and by local hospitality than were nonresidents of the area (Table 3.10). Further, locals were less likely to feel that the availability of travel information was adequate.

Table 3.10. Comparison of Ferry passenger's evaluation of the region's travel related services among locals and nonresidents of the Lake Champlain Valley.

	Local Residents	Nonresidents	F
Roads	3.07	3.43	31.61
Hospitality	3.65	3.84	10.65
Value for money	3.26	3.29	ns
Variety of activities	3.66	3.75	ns
Travel Info	3.62	3.76	5.31
Signs	3.62	3.64	ns
Scenic Overlooks	3.92	3.98	ns

Socioeconomic Profile. Table 3.11 also tells a similar story as before about differences between locals who tend to be day travelers and nonresidents who tend to be multi-day vacationers. The nonresidents of the Lake Champlain Valley had significantly higher incomes than locals and were more likely to reside in urban areas. There were no differences in age, education, or number of children. There also were no differences in gender. To make up the difference in the male/female ratio found in the day traveler/overnight traveler comparisons, the bulk of locals who were not on a day long pleasure trip must have been men either commuting to work or on a business trip

Table 3.11. Comparison of the socioeconomic profile among locals and nonresidents of the Lake Champlain Valley.

	Local Residents	Nonresidents	F
Gender (female)	43%	40%	ns
Age	42	43	ns
Education	4.43	4.57	ns
Income	3.94	4.57	26.35
Kids	.80	.84	ns
Residence	2.49	3.35	99.03

Vermont vs. New York Residents of the Lake Champlain Valley

A final question about the day traveler that can be asked of this data is, are local residents of Vermont who ride the Ferries different in any way from local residents of New York who ride the Ferries? On the one hand, one would expect the destinations of New York residents would differ from the destinations of Vermont residents. One would also expect the attractions that they visited would differ. On the other, we would not expect their experience on the Ferries to differ. Nor would we expect their use of travel information, or their travel expenditures would differ. The results were not so straight forward. Vermont and New York residents were similar in some expected ways and differed in some expected ways. The similarities and differences, however, were not always what were expected. One reason for the unexpected differences may have been the ratio of pleasure travelers among the two groups. Among Vermont passengers, 78% said they were traveling for pleasure, while only 66% of the New York residents said they were traveling on a pleasure trip ($F = 8.98, p < .00$).

Experience on the Ferries. Vermont and New York residents were identical in the ways that they first learned of the Lake Champlain Ferries. The majority (roughly 75%) said they lived in the area and had always known of the Ferries. The proportions did not differ on any of the knowledge options. Vermont and New York residents did differ in their experience on the Ferries (Table 3.12). New York residents had a longer history of riding the Ferries. New York residents on average first rode the Ferries in 1972 while Vermont residents on average first rode the Ferries in 1975. New York residents had more experience on the Grand Isle/Plattsburgh Ferry and crossed at that point more frequently than did Vermont residents. Vermont residents, on the other hand had more experience on the Charlotte/Essex Ferry, and rode the Charlotte/Essex Ferry and the Burlington/Port Kent Ferry more frequently than did New York residents.

There was no difference in the group size between local residents from the two states, nor was the proportion of people traveling across the Lake to destinations beyond the region different between residents of the two states. New York residents were somewhat more positive than Vermont residents in their evaluations of the Ferry's facilities and services. New York residents rated the cleanliness of the boats and the quality of the foods higher than did Vermont residents. Finally, New York residents were more likely than Vermont residents to listen to the travel information radio broadcast at the Ferry landings (Table 3.12).

Travel Experiences. Comparisons of travel experiences between New York and Vermont residents tells a mixed story also (Table 3.13). New York residents did not differ from Vermont residents in the information sources they used to help plan their trip. They also did not differ in the accommodations used while traveling. Passengers from the two states, however, did differ in the information sources they used once they were enroute. New York residents made more frequent use of printed travel information such as travel brochures, regional traveler's guidebooks, highway maps, and AAA guides.

Table 3.12. Comparisons of experience on the Ferries among Vermont and New York residents of the Lake Champlain region.

	Vermont	New York	F
First ride Ferries?	1975	1972	5.83
How many times have you ever been on:			
Grand Isle	4.87	5.79	20.56
Burlington	1.59	1.50	ns
Charlotte	2.20	1.59	10.23
How often do you ride:			
Grand Isle	3.63	4.01	4.77
Burlington	1.45	0.97	8.07
Charlotte	2.11	1.29	18.08
# of adults	1.84	1.77	ns
# of Children	.35	.42	ns
Beyond Champlain Valley	.19	.17	ns
Facilities and Services on Ferries			
Courtesy	4.24	4.31	ns
Cleanliness (dock)	3.98	4.16	7.42
Cleanliness (boat)	4.14	4.22	ns
Food	3.41	3.62	4.98
Restrooms	3.63	3.60	ns
Radio Signs	49%	50%	ns
Radio Listen	7%	12%	3.98
Radio Help	69%	72%	ns

Even more noticeable were the differences in the activities that people from the two states participated in while traveling. Passengers from the two states did not differ in the number of activities they reported. Vermont residents, however, were significantly more likely to participate in water-based and land-based outdoor activities. New York residents on the other hand were more likely to engage in general tourist activities like pleasure driving, shopping, and factory tours.

Finally, New York residents did not differ from Vermont residents in the amount of money they spent on their trip. Table 3.13 shows that New Yorkers spent slightly more on lodging than did Vermont residents. Given the measurement error in these expenditure figures, however, this difference is probably questionable.

Table 3.13. Comparisons in the travel experiences among Vermont and New York residents.

	Vermont	New York	F
Source of information used during trip:			
Chamber/Welcome Center	.04	.05	ns
Travel Guides	.18	.29	6.69
Friends/ Local News	.14	.16	ns
Local Service Employees	.05	.05	ns
Activities:			
Outdoor - Water	.21	.08	12.12
Outdoor - Land	.24	.12	8.87
General Tourist	.47	.67	8.02
Special Events	.12	.16	ns
Expenditures:			
Transportation	33.70	36.98	ns
Food	45.22	49.41	ns
Lodging	11.04	38.25	6.11
Retail	58.03	63.13	ns
Entertainment	43.07	28.80	ns
<u>Other</u>	<u>3.43</u>	<u>19.33</u>	ns
Total	194.49	235.90	

Travel Destinations. As expected, the results showed that New York Ferries passengers were more likely to list Vermont destinations as their main travel destination and Vermont Ferries passengers were more likely to list New York destinations as their main travel destinations (Table 3.14). New York residents were significantly more likely to be traveling to Burlington, the Stowe/Waterbury area, and the Rutland/Killington area. Vermont passengers were significantly more likely to be traveling to all New York regions.

The same was not true of the travel attractions visited by New York and Vermont passengers. First, Vermont passengers were somewhat less likely to visit the traditional tourist attractions in the region. Vermont passengers listed an average of 2.77 attractions visited while New York residents listed an average of 3.09 attractions visited ($F = 4.94, p = .02$). This indicates that overall Vermont residents, who were more likely to engage in water-based and land-based outdoor activities (Table 3.13), focused more on the natural attractions offered by the Lake Champlain Region, whereas the New York residents focused more on the cultural and built attractions offered in the Lake Champlain Region.

Even though Vermont residents visited fewer total tourist attractions, the proportion of Vermont visitors to each of the attractions differed little from the proportion of New York. Only 3 of the 16 attractions differed in their visitation by Vermont and New York resident. As expected, New York

passengers were significantly more likely to visit the Church Street Market Place than Vermont passengers on the Ferries. Contrary to what one might expect, New York residents were more likely to visit Santa's Workshop and the Lake Placid Olympic Center than were Vermont residents.

Table 3.14. Comparisons of travel destination among Vermont and New York residents of the Lake Champlain region.

	Vermont	New York	F
Main Travel Destinations			
Burlington	25%	73%	159.10
Central VT	2%	8%	10.51
VT Capitol	2%	4%	ns
South Central VT	0.4%	3%	5.83
South VT	0.8%	2%	ns
NE Kingdom	0.8%	1%	ns
Plattsburgh	54%	13%	126.04
Central Adirondacks	3%	0.3%	7.26
Ticonderoga	3%	0.3%	4.82
North Adirondacks	11%	2%	20.71
South Adirondacks	4%	1%	5.59
Passing Through	17%	13%	ns
Places Visited during trip:			
Shelburne Museum	16%	22%	ns
Ft. Ticonderoga	11%	15%	ns
Great Escape	13%	14%	ns
Clinton Co. Mus.	1%	2%	ns
Kent De Lord	3%	6%	ns
Ausable Chasm	15%	22%	ns
Crown Point	8%	9%	ns
High Falls Gorge	5%	8%	ns
Alice T. Miner	3%	8%	ns
Santa's Workshop	8%	17%	7.72
Ben & Jerry	14%	18%	ns
Church St. Mktpl.	16%	30%	10.43
Lake Placid	11%	20%	5.65
VT Teddy Bear	11%	10%	ns
Christmas Loft	8%	6%	ns
Lake Cruises	11%	9%	ns

Interest in Specialty Travel. Results from the questions about travel interests also support the notion that New York residents were more interested in more traditional tourist kinds of activities (Table 3.15). They were more interested in heritage travel, factory tours, and agriculturally related tourism

than were Vermont passengers. Vermont residents, on the other hand, were not more interested in outdoor activities like ecotourism or watchable wildlife. This may mean that Vermont passengers have less formal goals for their pleasure trip than what is typically embodied in these forms of specialty travel.

Table 3.15. Comparison of passenger interest in specialty travel among Vermont and New York residents of the Lake Champlain region.

	Vermont	New York	F
Heritage	2.35	2.62	5.91
Ecotourism	2.04	2.13	ns
Watchable Wildlife	2.63	2.73	ns
Factory Tours	1.66	1.95	9.73
Ag Tourism	1.68	1.99	9.19
Sports Tourism	2.33	2.46	ns
Gambling	1.97	1.91	ns

Quality of the Region's Travel Related Services. The results from Table 3.16 indicate that New York residents were a slightly more upbeat group in evaluating the travel related facilities and services of the region. New York residents felt more strongly than Vermont residents that travel in the region was a good value for the money. New York residents also felt more strongly than Vermont residents that there was a good variety of activities in the region. Both groups agreed in their evaluation of the quality of the region's roads, the hospitality of the locals, the availability of travel information, directional signs, and scenic overlooks.

Table 3.16. Comparison of passenger evaluation of the regions travel related services among Vermont and New York residents of the Lake Champlain region.

	Vermont	New York	F
Roads	3.04	3.09	ns
Hospitality	3.61	3.68	ns
Value for money	3.17	3.32	3.34
Variety of activities	3.57	3.72	3.19
Travel Info	3.56	3.66	ns
Signs	3.62	3.63	ns
Scenic Overlooks	3.84	3.99	ns

Socioeconomic Profile. Lastly, New York residents reported significantly higher household incomes than did Vermont residents (Table 3.17). They also were more likely to come from rural residences than Vermont passengers. This latter difference is probably due to the number of Vermont passengers who reside in the Burlington area.

Table 3.17. Comparison of the socioeconomic profile of Vermont and New York residents of the Lake Champlain region.

	Vermont	New York	F
Gender (female)	43%	43%	ns
Age	41	43	ns
Education	4.46	4.41	ns
Income	3.79	4.06	3.25
Kids	.75	.85	ns
Residence	2.74	2.30	22.57

BUSINESS TRAVELERS ON THE LAKE CHAMPLAIN FERRIES

The questionnaire also allowed us to examine differences between business travelers and pleasure travelers on the Lake Champlain Ferries. The data indicate (Figure 22) that at least 21.9% of the respondents were business travelers. This percentage is probably a bit low because the sampling strategy excluded pedestrians who commute to work and excluded vehicles with business logos (delivery trucks, etc.). This means that the Ferries accommodated at least 120,000 business trips annually and perhaps as many as 150,000 business trips annually if another 5% is added to the total business traveler ratio. This chapter therefore analyzes differences between business travelers and pleasure travelers on the Lake Champlain Ferries.

Experience on the Ferries

The results show that business travelers are primarily local residents of the Lake Champlain region. Nearly 80% of those passengers (79.5%) traveling on business were residents of the region while only 20.5% were residents from some place beyond the local area. Further, these local business travelers were more likely to be New York residents. New York residents comprised half (49.0%) of all the business passengers, while Vermont residents made up only 30.5% of the business travelers.

Consequently, business travelers were more likely than pleasure travelers to have first heard of the Ferries because they lived in the area. More than half the business travelers (58%) first found out about the area by living in the Lake Champlain region, as opposed to just under half (48%) of the pleasure travelers. Further, because business travelers were predominantly local residents they also had more experience riding the Ferries and rode the Ferries more frequently than pleasure travelers (Table 4.1). Specifically, business travelers had been on the Grand Isle/Plattsburgh Ferry from 25 to 50 times while the pleasure traveler and crossed at this point an average of roughly 10 times. They also used this crossing more frequently (about once a month) than pleasure travelers (about once every 6 months). Business travelers use the Charlotte/Essex Ferry much less frequently, having crossed at this point an average of roughly 2 times. While the business traveler had crossed at the Charlotte/Essex Ferry more times than the pleasure traveler, both the business traveler and the pleasure traveler used this crossing about once every couple of years. Finally, business travelers did not differ from pleasure travelers in the number of times they had used the Burlington/Port Kent crossing. Both groups had crossed at this point an average of just under 2 times. The pleasure traveler, on the other hand used this crossing more frequently, having crossed the Lake at this point about once every 2 years. The business traveler, on the other hand, may have crossed on the Burlington/Port Kent Ferry about once every 4 or 5 years.

These local business travelers were also more likely than pleasure travelers to be making trips to destinations within the Lake Champlain region. Table 4.1 shows that only 1 in 5 business travelers were crossing the Ferries enroute to some destination beyond the Lake Champlain region, while almost 1 in 3 pleasure travelers were through travelers.

Together, this suggests that local business people make more frequent use of the east/west transportation link offered by the Ferries. This may mean that those business people traveling in the

Table 4.1. Comparison of experience riding the Ferries among business travelers and pleasure travelers on the Lake Champlain Ferries.

	Business	Pleasure	F
How many times have you ever been on:			
Grand Isle	5.29	3.59	65.59
Burlington	1.26	1.25	ns
Charlotte	1.56	1.27	3.75
How often do you ride:			
Grand Isle	4.14	2.51	98.21
Burlington	.78	1.15	5.99
Charlotte	1.36	1.39	ns
Beyond Champlain Valley	.20	.30	12.31
# of adults	1.46	2.13	51.89
# of Children	.13	.54	23.94

Lake Champlain region who lived outside the area may make more frequent use of either air service to the area or the north/south transportation links offered by interstates 87 and 89. The interstate route they choose is contingent on whether they are doing business in New York or Vermont. Apparently, east/west trips between New York and Vermont are much less frequent for the business person who lives outside the Lake Champlain region.

Lastly, as would be expected, the group size of business travelers was significantly smaller than the group size of pleasure travelers. In addition, business travelers are much less likely to bring children with them during their trip. Only 20 out of 212 (8.6%) business travelers had children accompany them during their travels.

Travel Experiences

The travel experiences of business travelers differed in a number of significant ways from the experiences of the pleasure travelers (Table 4.2). First, business travelers were more likely than the pleasure travelers to be on a one day trip where they did not need overnight accommodations. Half of the business travelers (50%) were on a one day trip, while 42% of the pleasure travelers were on a one day trip. Among those business travelers needing overnight accommodations, fewer stayed with friends and relatives and fewer stayed in campgrounds than did pleasure travelers. Overall, however, business travelers and pleasure travelers did not differ in how frequently they paid for traditional overnight accommodations such as hotels, inns, and other overnight establishments.

Table 4.2. Comparison of travel experiences among business travelers and pleasure travelers on the Lake Champlain Ferries.

	Business	Pleasure	F
Accommodations Used:			
Day Trip	50%	42%	3.62
Hotel/Motel	18%	17%	ns
B&B	2%	2%	ns
Friend/Relative	6%	15%	10.81
Vacation Home	1%	4%	ns
Rented Cabin	0%	1%	ns
Resort	1%	1%	ns
Condo	1%	1%	ns
Campground	1%	7%	7.97
Other	8%	7%	ns
Sources of Information to Plan Trip			
Travel Guides	.31	.72	32.08
Media Advertisement/Story	.05	.16	10.28
Computer Sources	.03	.05	ns
Travel Agent/1-800	.02	.04	ns
Word of Mouth	.14	.23	6.98
Business Contacts	.18	.02	85.23
Source of information used during trip:			
Chamber/ Welcome Center	.04	.09	5.18
Travel Guides	.26	.57	28.87
Friends/ Local News	.10	.20	9.94
Local Service Employees	.07	.10	ns
Business Contacts	.09	.00	50.72
Activities:			
Outdoor - Water	.06	.32	31.28
Outdoor - Land	.06	.39	49.73
General Tourist	.27	1.05	99.57
Special Events	.05	.21	22.57

Business travelers also made less frequent use of travel information sources than did the pleasure traveler. Business travelers apparently do not think of themselves as tourists and are less likely to use travel information oriented toward the tourist/pleasure traveler such as travel brochures, regional travel guides, maps, and AAA guides to help plan their trip. Business travelers also are less likely than pleasure travelers to rely on media sources of radio, television, newspaper, or magazine advertising to help plan their trip. Finally, they are less likely than pleasure travelers to use informal

word-of-mouth sources of information to help plan their trip. As expected, however, they were more likely to use business contacts to help plan their trip.

Similarly, business travelers were not active travel information consumers during their trips. They were less likely to use Chamber of Commerce or Welcome Center travel information than pleasure travelers. They were less likely to use travel information designed for tourists, and they were less likely to use advice from friends or local news stories to help find their way around the region. They were just as likely as pleasure travelers to ask for advice from local service employees. And obviously, they were significantly more likely than pleasure travelers to get travel information from business contacts while traveling in the region. Therefore, while those responsible for tourism marketing embrace business travel as one form of tourism in a region, the business travelers generally ignore information sources designed for the tourist and probably do not think of themselves as tourists.

This finding is corroborated by results comparing business traveler and pleasure traveler activities. Business travelers were significantly less likely than pleasure travelers to participate in all travel related activities (Table 4.2). Only 5.6% of business travelers participated in water-based outdoor activities while 22.0% of the pleasure travelers participated in these activities. Only 6.0% of the business travelers participated in land-based outdoor activities while 28.0% of the pleasure travelers participated in these activities. Just 20.7% of the business travelers participated in more general tourist activities, while 60.5% of the pleasure travelers participated in these activities. Finally, only 4.7% of the business travelers attend special events during their trip, while 17.8% of the pleasure travelers did this. Overall, business travelers on average participated in .92 of the activities included in the questionnaire, while pleasure travelers on average participated in 2.30 of the activities mentioned in the questionnaire. Consequently, business travelers make infrequent use of travel related information sources and therefore are less frequent participants in travel related activities during their trip.

Lastly, business travelers did not differ from pleasure travelers in the amount of money spent while traveling. Business travelers on average spent roughly \$300 during their trip, while pleasure travelers on average spent roughly \$400 during their trip. The difference, however, was not statistically significant because of the large standard deviations (i.e., large measurement error).

Travel Destination

The results showed that the main travel destination differed between business and pleasure travelers in only one of the 11 places mentioned in the questionnaire. Business travelers were significantly more likely to list Burlington as their major destination than were pleasure travelers. Well over half the business travelers (59%) listed Burlington as their primary travel destination, while only 41% of the pleasure travelers listed Burlington as their primary travel destination. Part of the reason Burlington may be such a key destination for business travelers on the Ferries is that half of the business travelers were from New York, and apparently use the Ferries to do business across the

Lake in Burlington. Conversely, pleasure travelers may be using the Ferries to get to a wider variety of destinations.

This latter speculation about pleasure travelers is partly supported by Table 4.3. This table shows that business travelers were less likely than pleasure travelers to visit Shelburne Museum, Ausable Chasm, High Falls Gorge, Ben & Jerry's Ice Cream Factory, the Lake Placid Olympic Center, and Vermont Teddy Bear Factory. More importantly, business travelers on average visited .87 of the attractions mentioned in the questionnaire during their trip, while pleasure travelers on average visited 1.60 of the attractions included in the questionnaire.

Table 4.3. Comparison of the regional tourist attractions visited among business travelers and pleasure travelers during the trip in the Lake Champlain region.

	Business	Pleasure	F
Places Visited during trip:			
Shelburne Museum	12%	22%	7.66
Ft. Ticonderoga	10%	14%	ns
Great Escape	9%	10%	ns
Clinton Co. Mus.	1%	3%	ns
Kent De Lord	4%	4%	ns
Ausable Chasm	12%	22%	7.43
Crown Point	5%	8%	ns
High Falls Gorge	4%	9%	5.12
Alice T. Miner	3%	3%	ns
Santa's Workshop	8%	12%	ns
Ben & Jerry	11%	21%	9.83
Church St. Market Place	16%	23%	ns
Lake Placid	11%	21%	9.13
VT Teddy Bear	4%	14%	11.63
Christmas Loft	4%	6%	ns
Lake Cruises	9%	11%	ns

Interest in Specialty Travel

There were no differences between business travelers and pleasure travelers in their overall interest in various forms of specialty travel. Both types of travelers were equally interested in heritage tourism, ecotourism, agricultural tourism, sports tourism, etc. This again supports the notion that business travelers do not think of themselves as tourists. These lack of differences suggest business travelers have equivalent interests as pleasure travelers in tourist related activities and tourist related activities. Nevertheless, they engage in distinctly different travel behaviors while on a business trip.

Evaluations of Travel Related Services

Business travelers, like local residents, were somewhat less impressed with some of the travel related services offered by the region. Specifically, Table 4.4 shows they rated the quality of the region's roads less favorably than did pleasure travelers. They also rated the availability of travel information and the quality of the highway and directional signs lower than did pleasure travelers. This suggests that business travelers spend a lot of time in their cars and therefore higher standards for the enroute amenities of a region's transportation infrastructure. Pleasure travelers may be more tolerant of the comparatively more rustic quality of the region's transportation infrastructure.

Table 4.4. Comparison of the evaluations of the region's travel related services among business travelers and pleasure travelers in the Lake Champlain region.

	Business	Pleasure	F
Quality of Travel Related Services			
Roads	3.02	3.29	12.09
Hospitality	3.72	3.75	ns
Value for money	3.32	3.23	ns
Variety of activities	3.66	3.70	ns
Travel Info	3.52	3.72	7.24
Signs	3.48	3.68	6.34
Scenic Overlooks	3.86	3.97	ns

Socioeconomic Profile

Lastly, the socioeconomic profile of business travelers differed from pleasure travelers in two ways. First, business travelers were predominantly male. Only 28% of the business travelers in the sample were female (Table 4.5). This means that the Ferries accommodate roughly 34,000 business trips annually by women and roughly 86,000 business trips annually by men. Further, the business travelers in the sample were more likely to be from rural residences than were pleasure travelers. Business travelers using the Ferries were more often local residents of the predominantly rural Lake Champlain region. Pleasure travelers are more likely than business travelers to be residents of more distant urban regions outside of the Lake Champlain region.

Table 4.5. Comparison of the socioeconomic profile of business travelers and pleasure travelers on the Lake Champlain Ferries.

	Business	Pleasure	F
Gender (female)	28%	46%	23.69
Age	42	43	ns
Education	4.45	4.47	ns
Income	4.23	4.17	ns
Kids	.80	.77	ns
Residence	2.63	2.94	8.07

CHAPTER 5 DESTINATION MARKETING

The final goal of this study was to provide market data about some of the region's tourist attractions. This part of the study included two parts to the analysis: one descriptive and the other comparative. The descriptive part of the analysis identified visitor characteristics, travel information sources used, trip expenditures, travel activities, and interest in specialty travel for each of the 16 attractions included in the questionnaire. This part of the analysis selected out those people who visited an attraction and then ran descriptive statistics on those visitors. In the tables that follow, this descriptive information can be read horizontally (across rows).

The second part of the analysis compared visitor characteristics, travel information sources used, trip expenditures, travel activities, and interest in specialty travel among each of the 16 attractions in the questionnaire. Do some attractions attract a distinctly different visitor who use travel information differently, spend money differently, and have different travel interests? In the tables that follow, this comparative analysis can be read vertically (in columns). The sections that follow will focus primarily on the comparative differences between area attractions. Those interested in the descriptive components of a particular attraction need only to refer to the tables below.

Visitor Characteristics

Table 5.1 shows moderate differences in the visitor characteristics among Ferries passengers who visited the 16 regional tourist attractions. The average age ranged from 38 years old among visitors to the Great Escape to 49 years old among visitors to the Alice T. Miner Museum. Younger visitors also tended to be found at Ben & Jerry's Ice Cream Factory while older visitors tended to visit Crown Point and the Christmas Loft.

There were also only moderate differences in education levels among visitors to each of the Lake Champlain area attractions. The average education level ranged from a low of 4.22 among Great Escape visitors to a high of 4.79 among Alice T. Miner visitors. Clinton County Museum visitors and the Christmas Loft visitors were at the lower range of the education distribution. Visitors to most of the other attractions were in the 4.6 range. Either way, the average education levels of most visitors was near to a college education. The sample overall had higher education levels than the national average, and visitors, as a whole, to the Lake Champlain tourist attractions had education levels that exceeded the national average.

Income also did not vary much. Average household incomes of visitors to the area's tourist attractions ranged from 4.00 (roughly \$48,000 per year) to a high of 4.71 (roughly \$60,000). Clinton County Museum visitors were on the low end, while Alice T. Miner Museum visitors were on the high end. Visitors to Great Escape, Ausable Chasm, and Church Street Market Place were on the low end of the distribution, while High Falls Gorge visitors, Ben & Jerry's visitors, and Lake Placid Olympic Center visitors were on the upper end of the distribution. Like education, however, income levels overall of visitors to Lake Champlain tourist attractions were above the national average.

Table 5.1. Characteristics of visitors to tourist attractions in the Lake Champlain Region.

	Age	Education	Income	Children	Residence	NY or Vermont Resident (%New York)*	Local or Visitor (%Visitor)	Day or Overnight Trip (%Overnight)	Business or Pleasure Trip (%Business)
Shelburne Museum	44	4.65	4.38	.87	2.96	10%	44%	36%	12%
Ft. Ticonderoga	44	4.58	4.42	.97	2.82	10%	47%	42%	16%
The Great Escape	38	4.22	4.15	.94	2.74	8%	25%	30%	18%
Clinton County Museum	42	4.52	4.00	1.86	2.94	19%	56%	38%	10%
Kent de Lord House	43	4.72	4.48	1.06	2.94	20%	38%	37%	17%
Ausable Chasm	44	4.56	4.28	.73	3.02	12%	48%	43%	12%
Crown Point	46	4.61	4.38	.70	3.15	8%	40%	36%	14%
High Falls Gorge	45	4.55	4.49	.85	2.92	16%	53%	51%	9%
Alice T. Miner Museum	49	4.79	4.71	1.14	2.96	13%	41%	39%	18%
Santa's Workshop	44	4.60	4.33	1.11	2.80	19%	37%	40%	14%
Ben & Jerry's	40	4.64	4.48	.84	3.12	9%	52%	47%	11%
Church St. Marketplace	43	4.63	4.29	.65	2.95	16%	37%	32%	15%
Lake Placid Olympic Ctr.	44	4.68	4.48	.82	2.99	15%	52%	49%	11%
Vt. Teddy Bear Factory	45	4.55	4.40	.78	3.15	0%	52%	41%	7%
The Christmas Loft	48	4.43	4.42	.57	3.15	-6%	40%	38%	15%
Lake Champlain Cruises	43	4.65	4.43	.93	3.10	-4%	48%	35%	17%

* How much more likely are New Yorkers to visit attractions. (56.3% of the local residents were from New York. These percentages were calculated by subtracting 56.3% from the total % of New Yorkers who visited the attraction)

There were clear differences in the way that different tourist attractions in the region attracted people with children. Clinton County Museum visitors, Alice T. Miner Museum visitors, Santa's Workshop visitors, and Kent de Lord visitors attracted did a better job at attracting people with children. The Great Escape and Lake Champlain Cruises also were in the upper end of the distribution, although Ben & Jerry's visitors were in the middle of the distribution. Those attractions that appeal to people with fewer children include The Christmas Loft, Church Street Market Place, Crown Point, and Ausable Chasm. Therefore, the attractions oriented around shopping are less appealing to those with children, while the smaller local history museums generally do a good job of attracting people with children.

There were also some differences in the degree of rural or urban residence of visitors to the region's tourist attractions. In Table 5.1, the lower the number means that people on average come from more rural residences. This table shows that Crown Point, Vermont Teddy Bear Factory, the Christmas Loft, Lake Champlain Cruises, and Ben & Jerry's attract more urban residents. Conversely, The Great Escape, Ft. Ticonderoga, Santa's Workshop, and High Falls Gorge attracts more rural residents. This suggests that the former attractions that bring in more urban residents are drawing more nonlocal visitors who are coming to the area for a vacation, while the latter attractions that bring more rural residents are drawing from a more local clientele.

This is not confirmed when comparing visitors with nonvisitors. Ben & Jerry's and Vermont Teddy Bear Factory do attract a larger proportion of people who live outside the Lake Champlain region. However, 60% of the Crown Point visitors, 60% of the Christmas Loft visitors, and 52% of the Lake Champlain Cruise visitors are local visitors. This suggests that these latter three attractions draw a larger proportion of people from the Burlington and Plattsburgh areas than many of the other attractions. Other attractions that draw a majority of visitors who live beyond the immediate region include the Clinton County Museum, High Falls Gorge, and the Lake Placid Olympic Center. Those that rely more heavily on local residents include the Great Escape (75%), the Kent de Lord House (62%), Santa's Workshop (63%), and Church Street Market Place (63%).

Table 5.1 also compares visitation to the region's attractions among Vermont and New York residents of the Lake Champlain region. These percentages show that New York residents who ride the Ferries are more frequent visitors to the region's tourist attractions. New York residents were more likely than Vermont residents to visit all but three of the 16 attractions. Vermont residents were more likely to visit the Christmas Loft, and to ride on a Lake Champlain Cruise boat. They were also just as likely as New York residents to visit the Vermont Teddy Bear factory. In every other case, New York residents were more frequent visitors to regional tourist attractions than were Vermont residents who ride the Ferries.

Anywhere from 30% to 51% of the visitors to each of the 16 area tourist attractions were overnight visitors to the Lake Champlain region (Table 5.1). Those attractions who had the highest proportion of day visitors included the Great Escape (70%), Church Street Market Place (68%), Lake Champlain Cruises (65%), Crown Point (64%), and Shelburne Museum (64%). Those attractions who had this lowest proportion of day visitors included High Falls Gorge (49%), Lake Placid

Olympic Center (51%), and Ben & Jerry's (53%). In other words, the majority of visitors to the Great Escape and Church Street Market Place, who ride the Ferries, are local people traveling on a day trip, while more people visiting Vermont Teddy Bear Factory, Lake Placid Olympic Center, Ben & Jerry's, and High Falls Gorge are people who live outside of the Lake Champlain Region who are traveling on a multi-day vacation.

Lastly, roughly 10% to 20% of the business travelers frequented the area's tourist attraction. Business travelers, who rode the Ferries, were least likely to visit High Falls Gorge, Vermont Teddy Bear Factory, Clinton County Museum, the Lake Placid Olympic Center, and Ben & Jerry's. They were more likely to visit the Great Escape, the Alice T. Miner Museum, the Kent de Lord House, Lake Champlain Cruises, and Ft. Ticonderoga.

Sources of Information Used by Visitors to the Area's Attractions

Table 5.2 and 5.3 show standardized values for each of the indexed information variable. These standardized values provide relative comparisons among media types for each attractions and relative comparisons between different attractions. In other words, Table 5.2 shows that Shelburne Museum visitors made the most frequent use of printed and broadcast media in planning their trips and made the least frequent use of travel agents and 1-800 numbers in planning their trip. Similarly, Table 5.2 shows that Vermont Teddy Bear Factory visitors made the most frequent use of travel guidebooks, maps, travel brochures, AAA guides, etc. in planning their trip, while Kent de Lord visitors made least frequent use of these sources.

Overall, Table 5.2 shows that visitors to the various tourist attractions in the Lake Champlain region make most frequent use of printed travel information to help plan their trip (travel guidebooks, AAA guides, travel brochures, etc.). Visitors to the Vermont Teddy Bear Factory, Lake Placid Olympic Center, High Falls Gorge, and Lake Champlain Cruises make most frequent use of these printed travel information sources. Visitors to the Great Escape, Kent de Lord House, Clinton County Museum, Crown Point and Church Street Market Place make the least frequent use of these information sources.

Ferries passengers who visit the area's tourist attractions also make fairly frequent use of media sources such as newspaper advertisements and feature stories, magazine advertising, or broadcast advertising to help plan their trip. Again, Vermont Teddy Bear Factory visitors make the most frequent use of media sources of information. Church Street Market Place visitors and Alice T. Miner visitors also make fairly frequent use of these sources of information. Visitors to the Kent de Lord House, Ft. Ticonderoga, the Great Escape, High Falls Gorge, and Santa's Workshop make less frequent use of media to help plan their trip (Table 5.2).

Visitors to the region's tourist attractions as a whole make much less frequent use of computer resources such as internet web pages or cd-roms to help plan their trips. Those most likely to use these sources include visitors to Vermont Teddy Bear Factory, Lake Champlain Cruises, High Falls Gorge, and Ben & Jerry's. Those least likely to use computer information sources to help plan their

trip included visitors to the Clinton County Museum, the Alice T. Miner Museum, Crown Point, and Santa's workshop.

Table 5.2. Information sources used in trip planning by visitors to the Lake Champlain region's tourist attractions.

	Travel Guide	Media	Computer	Travel Advisor	Word of Mouth
Shelburne Museum	.12	.17	-.01	-.04	.11
Ft. Ticonderoga	.20	.07	.04	-.08	.07
The Great Escape	-.05	.08	.11	-.17	.17
Clinton County Museum	-.14	.22	-.19	-.17	.20
Kent de Lord House	-.20	-.11	.05	-.17	.14
Ausable Chasm	.26	.19	.09	-.05	.11
Crown Point	.06	.17	-.05	-.09	-.25
High Falls Gorge	.39	.06	.13	-.02	-.01
Alice T. Miner Museum	.29	.23	-.19	.04	.35
Santa's Workshop	.19	.07	-.02	-.07	.13
Ben & Jerry's	.27	.16	.13	-.08	.07
Church St. Marketplace	.07	.21	.09	-.17	.12
Lake Placid Olympic Ctr.	.38	.14	.10	-.05	.11
Vt. Teddy Bear Factory	.68	.31	.19	-.12	.20
The Christmas Loft	.07	.17	-.11	-.17	.14
Lake Champlain Cruises	.33	.09	.14	-.17	.14

The use of travel agents or toll free numbers was almost nonexistent among visitors to the region's tourist attractions. Alice T. Miner Museum visitors were the most likely to use these information resources, while the two retail oriented attractions (Church Street Market Place and the Christmas Loft), along with visitors to the Great Escape, Clinton County Museum, Kent de Lord House, and Lake Champlain Cruises were the least likely to use these information resources.

Lastly, word of mouth is always a uniformly popular way of gathering travel information. Visitors to some of the smaller museums of local history (Clinton County Museum and Alice T. Miner Museum) made most frequent use of this information source. The Vermont Teddy Bear Factory visitors and the Great Escape visitors also relied most heavily on word of mouth to help plan their trip. Crown Point visitors, High Falls Gorge visitors, Ft. Ticonderoga visitors, and Ben & Jerry's visitors made less use of word-of-mouth information to help plan their trip.

Overall, Table 5.2 shows that Vermont Teddy Bear Factory visitors, by far, make the most frequent use of travel information sources to help plan their trip. Visitors to the Alice T. Miner Museum, the Lake Placid Olympic Center, and Ausable Chasm have also made frequent use of travel information sources to help plan their trip. Those who have made much less frequent use of travel information and who have apparently taken more spur of the moment, impulse trips include visitors to the Kent de Lord House, Clinton County Museum, Crown Point, the Christmas Loft, and the Great Escape.

Table 5.3 tells a similar story about information sources used once people are traveling in the region. Vermont Teddy Bear Factory visitors again are the most frequent consumers of information sources while traveling, followed by visitors to Lake Placid Olympic Center, Shelburne Museum, Lake Champlain Cruises, and Ben & Jerry's. Those who make little use of information sources enroute include visitors to Crown Point, Alice T. Miner Museum, Clinton County Museum, the Great Escape, and the Christmas Loft. Those visitors to the local history museums appear to use travel information sources least frequently while traveling.

Table 5.3. Information sources used by visitors to the Lake Champlain region's tourist attractions while traveling in the area.

	Chamber/ Welcome Center	Travel Guide	News or Friend	Local Service People
Shelburne Museum	.19	.37	.35	.18
Ft. Ticonderoga	.09	.33	.19	.10
The Great Escape	.09	.04	.17	.27
Clinton County Museum	.06	.04	.34	.28
Kent de Lord House	.20	-.06	.09	.04
Ausable Chasm	.17	.45	.16	.06
Crown Point	-.09	.19	-.11	.15
High Falls Gorge	.18	.57	.16	.06
Alice T. Miner Museum	-.25	.03	.21	.22
Santa's Workshop	.17	.28	.11	.22
Ben & Jerry's	.12	.25	.36	.15
Church St. Marketplace	.14	.21	.35	.08
Lake Placid Olympic Ctr.	.21	.46	.29	.22
Vt. Teddy Bear Factory	.23	.61	.48	.27
The Christmas Loft	.07	.36	.04	.12
Lake Champlain Cruises	.25	.35	.24	.14

Specifically, travelers in the area were more likely to use travel guides (brochures, maps, etc.), advice from friends and local news stories as sources of information about the region. They were somewhat less likely to use Chamber of Commerce or Welcome Center information. They were also somewhat less likely to ask directions from local service people like gas station attendants or hotel clerks. Visitors to Vermont Teddy Bear Factory, Lake Placid Olympic Center, Lake Champlain Cruises, Shelburne Museum, and High Falls Gorge were more likely to use Chamber of Commerce and Welcome Center information sources, while visitors to the Alice T. Miner Museum, Crown Point, Clinton County Museum, and the Christmas Loft were least likely to use these information sources.

Similarly, visitors to the Vermont Teddy Bear Factory, Lake Placid Olympic Center, High Falls Gorge, and Ausable Chasm were more likely to use travel guides as sources of travel information while traveling in the region. Visitors to the Kent de Lord House, the Great Escape, the Clinton

County Museum, and the Alice T. Miner Museum were the least likely to use printed travel guides while traveling.

A slightly different group of visitors were more likely to rely on advice from friends or local news sources for travel information while traveling in the Lake Champlain region. Visitors to Vermont Teddy Bear Factory, Ben & Jerry's, Church Street Market Place, Shelburne Museum, and Clinton County Museum were more likely to rely on these more informal sources of travel information, while visitors to Crown Point, the Christmas Loft, and the Kent de Lord House were least likely to use these information sources.

Finally, visitors to the Clinton County Museum, the Great Escape, and Vermont Teddy Bear Factory, were the most likely to ask local service people for travel information during their trip. Conversely, visitors to the Kent de Lord House, Ausable Chasm, High Falls Gorge, and Church Street Market Place were least likely to use these local sources of travel information.

Activity Packages

The study also analyzed what additional types of activities that visitors to each of the regions tourist attractions may have participated in during their trip. The numbers reported in Table 5.4 are also standardized values of the indexed variables. As before, these standardized values allow comparisons across individual attractions and between the different attractions.

Table 5.4 shows broad variation in the mix of activities chosen by Lake Champlain Ferries passengers. Those most likely to engage in water-based outdoor activities like swimming, fishing, sailing, water skiing, or wind surfing were also the most likely to visit the Clinton County Museum, the Alice T. Miner Museum, High Falls Gorge, and the Kent de Lord House. Those least interested in these water-based activities were those who visited the Christmas Loft, Church Street Market Place, and Shelburne Museum. Apparently, shopping as a travel activity does not mix well with water-based travel activities.

Those most likely to engage in land-based outdoor activities like hiking, climbing, hunting, golf, tennis, or horseback riding were also more likely to have visited the Vermont Teddy Bear Factory, Ben & Jerry's, the Lake Placid Olympic Center, High Falls Gorge, and Ausable Chasm. Those least likely to engage in these activities were those who visited the Clinton County Museum, the Christmas Loft, the Great Escape, and Santa's Workshop. These findings suggest that those who engage in land-based outdoor activities tend to be the ones who rely more heavily on travel information sources to help plan and guide one's trip.

Table 5.4 shows that those who engage in more traditional tourist activities such as driving for pleasure, arts and crafts shows, heritage tourism, shopping, and factory tours are more likely to also visit Ben & Jerry's, the Vermont Teddy Bear Factory, Lake Placid Olympic Center, High Falls Gorge, and Shelburne Museum. As expected, these attractions constitute the most frequently visited

sites in the Lake Champlain region. Those least likely to engage in traditional tourist activities included visitors to the Great Escape, the Kent de Lord House, and Crown Point.

Table 5.4. Other activities participated in by visitors to the Lake Champlain region's tourist attractions.

	Water-based Outdoor Activities	Land-based Outdoor Activities	Tourist Attractions	Special Events
Shelburne Museum	.10	.27	.48	.28
Ft. Ticonderoga	.26	.26	.42	.24
The Great Escape	.24	-.01	.09	.25
Clinton County Museum	.42	-.26	.34	.55
Kent de Lord House	.30	.04	.15	.46
Ausable Chasm	.19	.32	.39	.27
Crown Point	.29	.21	.26	.18
High Falls Gorge	.30	.53	.52	.30
Alice T. Miner Museum	.36	.11	.38	.90
Santa's Workshop	.21	.04	.30	.14
Ben & Jerry's	.18	.37	.59	.40
Church St. Marketplace	.03	.28	.49	.37
Lake Placid Olympic Ctr.	.21	.37	.50	.20
Vt. Teddy Bear Factory	.14	.41	.87	.33
The Christmas Loft	-.04	-.02	.48	.47
Lake Champlain Cruises	.18	.31	.48	.28

Finally, those who enjoy attending concerts and festivals are more likely to visit Clinton County Museum, the Alice T. Miner Museum, the Christmas Loft, and the Kent de Lord House. Those least likely to attend concerts or festivals included visitors to Crown Point, the Lake Placid Olympic Center, Lake Champlain Cruises, Santa's Workshop, Ft. Ticonderoga, Shelburne Museum, and the Great Escape. These findings suggest that concerts and festivals attract a distinctly local clientele, and less frequently draw the nonlocal tourist who makes the rounds to the major attractions in the region.

Expenditures

The study also analyzed the expenditures of Lake Champlain Ferry passengers who visited each of the 16 tourist attractions in the questionnaire. Table 5.5 shows that the big spenders were those (in rank order) who visited High Falls Gorge, the Vermont Teddy Bear Factory, the Lake Placid Olympic Center, and the Lake Champlain cruises. Those who spent the least amount of money during their trip were visitors (rank ordered from the least) to the Great Escape, Kent de Lord House, the Great Escape, the Christmas Loft, Santa's Workshop, and Shelburne Museum.

Typically, visitors at the "big spending" attractions spent the most across all categories. There were some exceptions however. Table 5.5 shows that visitors to High Falls Gorge, Vermont Teddy Bear Factory, Lake Placid Olympic Center, Crown Point, and Ben and Jerry's spent the most on transportation while, visitors to Clinton County Museum, the Great Escape, and the Christmas Loft spent the least on transportation.

Table 5.5. Trip expenditures among visitors to the Lake Champlain region's tourist attractions.

	Transport	Food	Lodging	Retail	Entertain	Other
Shelburne Museum	98.99	92.37	67.76	85.46	44.12	7.03
Ft. Ticonderoga	79.15	106.12	86.19	97.41	61.60	39.11
The Great Escape	40.18	64.86	62.76	95.75	60.69	14.77
Clinton County Museum	38.64	70.35	58.92	72.50	19.28	23.21
Kent de Lord House	61.23	61.20	50.00	82.40	53.00	17.00
Ausable Chasm	90.41	99.36	91.00	99.26	62.75	8.28
Crown Point	104.27	99.95	74.13	114.67	84.91	20.10
High Falls Gorge	162.61	147.87	128.69	214.46	99.61	13.82
Alice T. Miner Museum	66.86	110.29	52.94	119.11	60.00	22.05
Santa's Workshop	60.06	89.91	78.95	85.55	59.26	7.98
Ben & Jerry's	105.46	102.48	107.65	113.16	51.68	20.52
Church St. Marketplace	74.46	89.02	71.48	122.45	54.49	18.52
Lake Placid Olympic Ctr.	110.14	125.25	155.73	170.01	88.00	21.04
Vt. Teddy Bear Factory	170.90	129.68	127.82	145.84	98.43	4.11
The Christmas Loft	51.43	99.75	85.83	102.36	34.16	6.94
Lake Champlain Cruises	87.87	125.40	122.82	155.95	77.28	34.76

Visitors to High Falls Gorge, Vermont Teddy Bear Factory, Lake Placid Olympic Center, Lake Champlain cruises, the Alice T. Miner Museum and Ft. Ticonderoga spent the most for food during their trip. Conversely, visitors to the Great Escape, Clinton County Museum, and the Kent de Lord House spent the least on food during their trip.

Once again visitors to High Falls Gorge, Vermont Teddy Bear Factory, Lake Placid Olympic Center, Lake Champlain cruises, and Ben and Jerry's spent the most for lodging. Visitors to these attractions apparently include more nonlocal residents who are making multi-day trips to the region. Visitors who spent the least amount of money on lodging included primarily those visiting local history museums like the Clinton County Museum, the Kent de Lord house, and the Alice T Miner Museum. Visitors to the Great Escape and Shelburne Museum also spent comparatively little on lodging.

Retail spending was the biggest area of spending among Ferries passengers who visited the area's tourist attractions. Visitors to 9 of the 16 destinations spent, on average, more than \$100 during their trip. These destinations included (in rank order) High Falls Gorge, Lake Placid Olympic Center, Lake Champlain cruises, Vermont Teddy Bear Factory, Church Street Market Place, Alice T. Miner Museum, Crown Point, Ben and Jerry's, and the Christmas Loft. Those spending the least on retail

purchases were visitors to the Clinton County Museum, Kent de Lord House, Shelburne Museum, and Santa's Workshop.

Expenditures on entertainment follow basically the same pattern with visitors to High Falls Gorge, Lake Placid Olympic Center, Lake Champlain cruises, and Vermont Teddy Bear Factory spending the most, while visitors to the Kent de Lord House, the Christmas Loft, and Shelburne Museum spending the least on entertainment.

Expenditures on "other" things not included in the questionnaire were randomly distributed across the attractions. Extra add-on expenses were highest among visitors to Ft. Ticonderoga, Lake Champlain cruises, Clinton County Museum, and the Alice T. Miner Museum, while add-on expenses were lowest among visitors to the Vermont Teddy Bear Factory, Shelburne Museum, Santa's Workshop, the Christmas Loft, and Ausable Chasm.

Interest in Specialty Travel

Finally, the study compared interest in various forms of specialty travel such as heritage tourism, ecotourism, etc. among visitors to each of the 16 travel destinations included in the questionnaire. Table 5.6 shows few surprises in people's interest in heritage tourism. Ferry passengers who visited the the heritage sites in the list (Shelburne Museum, Ft. Ticonderoga, Clinton County Museum, Kent de Lord House, and the Alice T. Miner Museum) reported the strongest interest in heritage tourism. Conversely visitors to the Great Escape, Ben & Jerry's, Church Street Market Place, and High Falls Gorge reported the lowest interest in heritage tourism.

On the other hand, those visitors of the natural attractions (High Falls Gorge, Ausable Chasm, Lake Champlain cruises) were not more interested in ecotourism. Those most interested in ecotourism were basically the same as those most interested in heritage tourism. Those reporting the most interest in ecotourism included visitors to Clinton County Museum, Kent de Lord House, Crown Point, Alice T. Miner Museum, and Shelburne Museum. Those reporting the least interest in ecotourism were visitors to the Great Escape, Santa's Workshop, Vermont Teddy Bear Factory, High Falls Gorge, and Ausable Chasm.

There was almost no variation in interest in factory tours among visitors to the area's tourist attractions. The highest rating was 3.0 (on a 5-point scale) among visitors to the Kent de Lord House, while the lowest score was 2.71 among visitors to the Great Escape. The difference between these extremes was not significantly different. What is most notable about these responses is that visitors to the factory tours (Ben & Jerry's and Vermont Teddy Bear Factory) did not rate their interest higher than visitors to any of the other attractions. Overall, visitors to all attractions generally expressed the strongest interest in factory tourism.

Table 5.6 shows fairly wide variation in peoples' interest in watchable wildlife. Those with the strongest interest in watchable wildlife as a tourist activity included visitors to the Clinton County Museum, the Vermont Teddy Bear Factory, and the Christmas Loft. Conversely those with the least

interest in watchable wildlife were visitors to the Kent de Lord House, the Alice T. Miner Museum, the Lake Placid Olympic Center, and Lake Champlain cruises.

Table 5.6. Interest in specialty travel among visitors to the Lake Champlain region's tourist attractions.

	Heritage	Ecotour	Factory	Wildlife	Agri.	Sports	Gambling
Shelburne Museum	2.83	2.29	2.88	2.12	2.22	2.52	1.68
Ft. Ticonderoga	2.89	2.24	2.98	2.08	2.18	2.53	1.77
The Great Escape	2.53	2.01	2.71	2.00	1.91	2.68	2.24
Clinton County Museum	3.40	2.44	2.95	2.25	2.32	2.21	1.58
Kent de Lord House	3.00	2.37	3.00	1.87	2.06	2.52	1.55
Ausable Chasm	2.68	2.18	2.91	2.06	2.18	2.51	1.87
Crown Point	2.91	2.33	3.13	2.10	2.37	2.48	1.75
High Falls Gorge	2.61	2.16	2.95	2.05	2.16	2.43	1.86
Alice T. Miner Museum	3.08	2.57	2.96	1.83	2.20	2.50	1.48
Santa's Workshop	2.67	2.10	2.73	2.00	2.06	2.62	1.82
Ben & Jerry's	2.64	2.23	2.94	2.15	2.04	2.62	1.92
Church St. Marketplace	2.59	2.27	2.79	2.05	1.96	2.43	1.84
Lake Placid Olympic Ctr.	2.78	2.24	2.86	1.97	1.99	2.58	1.73
Vt. Teddy Bear Factory	2.72	2.05	2.84	2.32	2.07	2.69	1.88
The Christmas Loft	2.83	2.20	2.93	2.24	2.02	2.84	1.93
Lake Champlain Cruises	2.66	2.25	2.87	1.93	2.00	2.61	2.15

Interest in agricultural based tourism ranged from a low of 1.91 to a high of 2.37. Those most interested in agricultural tourism were visitors to Crown Point, Clinton County Museum, Ausable Chasm, and the Alice T. Miner Museum. Those least interested in agricultural tourism included visitors to the Great Escape, Church Street Market Place, Lake Placid Olympic Center, and Lake Champlain cruises.

Interest in sports based tourism also showed fairly wide variation. Visitors to the Christmas Loft expressed the strongest interest in sports tourism (2.84), while visitors to the Clinton County Museum expressed the least interest in sports tourism (2.21). As might be expected, visitors to the Lake Placid Olympic Center were on the high end of interest (2.69), along with visitors to the Great Escape, Santa's Workshop, Ben & Jerry's, and Lake Champlain cruises. Those expressing less interest in sports tourism included visitors to Crown Point, High Falls Gorge, and Church Street Market Place.

Overall, Lake Champlain Ferries passengers had little interest in gambling as a form of specialty travel. Interest in this activity did range from a high of 2.24 among visitors to the Great Escape to a low of 1.48 among visitors to the Alice T. Miner Museum. Other visitors who expressed slightly stronger interest in gambling included those who visited the Christmas Loft, Ben & Jerry's, and Lake Champlain cruises. Those with less interest in gambling also included visitors to the Clinton County Museum, the Kent de Lord House, and Shelburne Museum.

Summary. Overall, the Great Escape visitors were a group with little interest in most forms of specialty travel compared to visitors from other area attractions. They had the least interest in heritage tourism, ecotourism, factory tourism, and agricultural tourism. Conversely, Great Escape visitors had the strongest interest in gambling. Visitors to the Alice T. Miner Museum were also frequently at the extremes of the ratings. These visitors expressed the strongest interest in ecotourism, while expressing the least interest in watchable wildlife and gambling. Alice T. Miner visitors also expressed strong interest in heritage tourism, factory tourism, and agricultural tourism. Visitors to the other small local history museums (Kent de Lord, Clinton County Museum) had similar interest profiles as visitors to the Alice T. Miner Museum. Visitors to some of the more prominent heritage sites (Shelburne Museum, Ft. Ticonderoga, and Crown Point) expressed wider variation their specialty travel interests, typically falling in the middle of the distribution. Crown Point visitors, however, expressed the strongest interest in factory tourism and agricultural tourism. Visitors to the remaining attractions typically expressed the strongest interest in factory tourism and the least interest in gambling. Visitors to the Vermont Teddy Bear Factory were more interested in watchable wildlife than visitors to other attractions, while visitors to the Christmas Loft expressed the strongest interest in sports tourism among visitors to all other attractions.

Conclusion

The results from this analysis show that Great Escape visitors are a group unto themselves. They often fall at the extremes of the distributions across many of the variables used in the analysis. They are typically local residents on day trips, who are younger, have less education and income, and who make infrequent use of travel information sources. They also participate in fewer other types of travel activities during their trip, and have little interest in specialty forms of travel. The results also show that visitors to the small local history museums (Clinton County Museum, Kent de Lord House, and the Alice T. Miner Museum) generally cluster together in their responses, while visitors to the more prominent historical attractions (Shelburne Museum, Ft. Ticonderoga, and Crown Point) generally cluster together in their responses. Crown Point visitors differ noticeably in their less frequent use of travel information before and during the trip. Four attractions (the Christmas Loft, Lake Champlain cruises, Church Street Market Place, and Santa's Workshop) generally attract a local clientele. These visitors therefore use information in roughly similar ways, participate in roughly the same activities during their trip, and spend approximately similar amounts of money during their trips. The Vermont Teddy Bear Factory, Lake Placid Olympic Center, Ben & Jerry's, High Falls Gorge, and Ausable Chasm generally attract more nonlocal visitors to the region. Visitors to these attractions, consequently use information in similar ways, participate in similar activities during their trip, and spend approximately similar amounts of money during their travels.

APPENDIX A METHODS

The goal of the study was to produce a representative sample of passengers who ride the Lake Champlain Ferries during the six month season between May and October. The majority of passengers who ride the Ferries travel at some time during this six month period. Further, most tourists who ride the Ferries also ride during this time. These six months include all of the time that the Burlington/Port Kent Ferry is open and most of the time that the Charlotte/Essex Ferry is open. The Grand Isle/Plattsburgh Ferry stays open year round.

Sampling

Data collection took place on 31 days during the six month time frame (20% of the available days). To attain responses from a representative group of Lake Champlain Ferries users, we used a proportionate random sampling technique. The Lake Champlain Ferries provided use figures from 1995 by month and by crossing (Table A.1). We then developed a sampling schedule at each of the three crossings that was proportionate to use across the 6 month period. For example, during July, the sampling schedule included 5 days at Grand Isle/Plattsburgh, 2 days at Burlington/Port Kent and 2 days at Charlotte Essex. The goal was to collect a sample that included 70% Grand Isle/Plattsburgh passengers, 11% Burlington/Port Kent passengers, and 18% Charlotte/Essex passengers.

Table A.1. 1995 use figures and proportions from May through October on the Lake Champlain Ferries.

	May	June	July	August	Sept.	October	Total
Grand Isle/Plattsburgh	57000 (82%)	61500 (73%)	70000 (63%)	74900 (63%)	62500 (70%)	60800 (76%)	386700 (70%)
Burlington/Port Kent	2200 (3%)	8000 (9%)	17300 (16%)	18000 (15%)	10700 (12%)	5700 (7%)	61900 (11%)
Charlotte/Essex	10000 (14%)	15000 (18%)	23000 (21%)	24800 (21%)	16000 (18%)	13000 (16%)	101800 (18%)
Total	69200 (13%)	84500 (15%)	110300 (20%)	117700 (21%)	89200 (16%)	79500 (15%)	550400 (100%)

The sampling procedure also took into account the distribution of use on week days and weekend days. According to the Lake Champlain Ferries, 55% of their total use in 1995 came on weekend days (Saturday, and Sunday), while 45% of their use came on week days (Monday through Friday). The sampling schedule therefore selected weekend days and week days proportionate to use. In all, passengers were sampled on 17 weekend days (54.8% of the sampling days) and 14 week days (45.2% of the sampling days).

Finally, sampling was conducted at each of the crossings over an 8 hour period on the assigned day. At the Charlotte/Essex crossing and the Burlington/Port Kent crossing, sampling was conducted by

the deck hands, and therefore followed the time of their shifts. This meant that sampling at the Charlotte/Essex Ferry began as early as 6:45 a.m. and as late as 10:00 p.m. This ferry ran each day from 5:00 a.m. to 1:00 a.m. Similarly, sampling on the Burlington/Port Kent Ferry began as early as 9:30 a.m. and as late as 9:10 p.m. This ferry ran each day from 8:00 until 10:00 p.m. The Grand Isle/Plattsburgh Ferry, like Charlotte/Essex also runs from 5:00 a.m. until 1:00 a.m. The sampling schedule was purposefully staggered across different times of the day to cover most of the operating hours at this crossing. Specifically, the schedule was created to represent early morning/late afternoon commuters as well as the pleasure traveler who may cross at any time during the day. Consequently, sampling at the Grand Isle/Plattsburgh crossing was scheduled to begin as early as 7:00 a.m. (going until 3:00 p.m) and as late as 1:00 p.m. (going until 9:00 p.m.). Table A.2 shows the sampling days at each of the 3 crossings.

Between the three crossings, the sample included 1125 respondents. There were 820 people who were surveyed at the Grand Isle/Plattsburgh crossing (72.9%), 106 surveyed at the Burlington/Port Kent crossing (9.4%), and 199 interviewed at the Charlotte/Essex crossing (17.7%).

Selection Process

Survey workers were provided an interviewer training manual and given a one hour training session at the beginning of the summer. The importance of a random selection process was stressed in this training session. Interviewers on the Charlotte/Essex Ferry and Burlington/Port Kent Ferry were instructed to approach the first car or motorcycle on the boat and the last car or motorcycle on the boat and ask the driver to fill out a 9 page questionnaire while crossing the Lake. The Grand Isle/Plattsburgh crossing takes only about 20 minutes from the point when one drives on board until they drive away on the other side. Therefore, there was some initial concern about whether people would have enough time to complete the survey. Consequently, the interviewers at this crossing were instructed to give a survey to the first car on board, and then the forward most car in the next lane of traffic. This selection process ensured that respondents would have enough time to get through the 8 to 10 minute questionnaire. Only a small handful (less than 10) of respondents were unable to complete the survey while crossing the Grand Isle/Plattsburgh Ferry. The training stressed the importance of the random selection process. The training manual stated: "Do not select people to interview based on who may look the most friendly. This can bias the sample. If the person in the first and last cars is the surliest looking person on board, you still must approach them and ask them to participate in the survey."

The selection process excluded any commercial vehicles using the Ferries, including any delivery trucks or vehicles, and any cars with business logos or government license plates. The selection process also excluded pedestrians or bicyclists. The Lake Champlain Ferries are able to keep track of its commercial traffic by the differential rates they charge to commercial vehicles. The selection process may have caused us to underestimate the number of commuters, many of whom may be pedestrians with cars parked at either of the landings.

Table A.2. Sampling schedules for the Grand Isle/Plattsburgh, Burlington/Port Kent, and Charlotte/Essex Ferries.

	DATE	DAY	TIME
GRAND ISLE/ PLATTSBURGH	June 8	Saturday	10:00 a.m. to 4:00 p.m.
	June 23	Sunday	9:00 a.m. to 3:00 p.m.
	July 1	Monday	11:00 a.m. to 7:00 p.m.
	July 3	Wednesday	1:00 p.m. to 9:00 p.m.
	July 6	Saturday	8:00 a.m. to 4:00 p.m.
	July 21	Sunday	10:00 a.m. to 6:00 p.m.
	July 30	Tuesday	12:00 noon to 8:00 p.m.
	August 1	Thursday	9:00 a.m. to 5:00 p.m.
	August 4	Sunday	7:00 a.m. to 3:00 p.m.
	August 10	Saturday	11:00 a.m. to 7:00 p.m.
	August 18	Sunday	1:00 p.m. to 9:00 p.m.
	August 22	Thursday	8:00 a.m. to 4:00 p.m.
	September 13	Friday	10:00 a.m. to 6:00 p.m.
	September 14	Saturday	12:00 noon to 8:00 p.m.
	September 21	Saturday	9:00 a.m. to 5:00 p.m.
	October 5	Saturday	7:00 a.m. to 3:00 p.m.
October 11	Friday	11:00 a.m. to 7:00 p.m.	
October 26	Saturday	10:00 p.m. to 6:00 p.m.	
BURLINGTON/ PORT KENT	June 18	Tuesday	During Shift Hours
	July 28	Sunday	During Shift Hours
	August 1	Thursday	During Shift Hours
	August 13	Tuesday	During Shift Hours
	August 25	Sunday	During Shift Hours
	October 13	Sunday	During Shift Hours
CHARLOTTE/ ESSEX	May 17 -	Friday	During Shift Hours
	June 15 -	Saturday	During Shift Hours
	July 24 -	Wednesday	During Shift Hours
	July 31 -	Wednesday	During Shift Hours
	August 3 -	Saturday	During Shift Hours
	August 21 -	Wednesday	During Shift Hours
	October 20 -	Sunday	During Shift Hours

Refusals

If people refused to participate in the survey, interviewers were instructed to approach the next car in line behind the first passenger on board, or the next to last car in front of the last passenger on board. We were fortunate enough to have excellent survey workers, and the refusal rate was quite low. Only 52 people refused to participate in the survey throughout the 6 month sampling time frame. Five of

those 52 people also refused because they had already filled out a questionnaire previously. This represents a 95.6% response rate achieved by the survey workers.

With such a small refusal rate, one need not be too concerned about nonresponse bias in the sample. Nevertheless, when someone refused to participate, interviewers were instructed to record the time, the approximate age of the person refusing, the gender of the person refusing, the number of adults in the car, and the number of children in the car. We then compared nonrespondents to respondents on these dimensions. The comparison showed that nonrespondents traveled in smaller groups than respondents. Nonrespondents traveled with fewer other adults ($F=3.97$, $p=.04$), and fewer children ($F=4.32$; $p=.03$). Nonrespondents were also more likely than respondents to be female ($F=17.27$; $p<.00$). Therefore, nonrespondents were more often women traveling alone. Nonrespondents did not differ from respondents in the average times interviewed, age, location, or date contacted.

Questionnaire

Once a passenger had agreed to participate, he or she was handed a 9-page questionnaire (see Appendix B) on a clipboard and instructed to fill it out while crossing the Lake on the Ferry. The survey included the following types of questions:

Experience on any of the three Ferries

- How they first learned of the Lake Champlain Ferries
- When they first rode the Ferries
- How many times they had been on any of the Ferries
- How frequently they rode any of the Ferries
- How many minutes they waited for the Ferry at the landing
- Group size, including number of adults and number of children
- Did they listen to the travel information radio broadcast
- Their evaluations of Ferry facilities and services
- Purpose of their trip

Characteristics of their travel in the Lake Champlain region:

- How frequently in the past they had visited the region
- Main travel destinations (by region within the two state area)
- Overnight accommodations used
- Sources of travel information used to plan their trip
- Sources of travel information used while traveling in the region
- Travel activities that they participated in
- Tourist attractions visited
- Travel expenditures
- Interest in various forms of specialty travel
- Evaluation of the regions travel related infrastructure and services

Socioeconomic information (Age, gender, income, education, residence)

We also made a French translation of the questionnaire available to those passengers from Quebec. Unfortunately, however, only 3 people chose to use the French version. We did miss at least two people in June before the translation was completed.

Analysis

This study analyzed the data using 1) basic descriptive statistics 2) crosstabs and chi-square statistics 3) factor analysis, and 4) analysis of variance. Descriptive statistics used in this study include frequency distributions, means, medians, and standard deviation. Chi-square is a measure of association between two variables based on their cross-tabulation. Factor analysis is a data reduction technique based on correlations. It groups multiple variables whose responses are similar across a sample of people into a single latent construct. A single index variable can then be created by adding the responses of each variable that was included in the latent construct.

Factor Analysis. In this study, we used factor analysis on three sets of questions: 1) the sources of information passengers used to plan their trip, 2) the sources of information people used while traveling, and 3) the leisure activities people participated in while traveling. The factor analysis of the 15 items that measured sources of travel information passengers used to plan their trip yielded a 5-factor solution. The first factor, labeled travel guides, included regional travel guidebooks, highway maps, travel brochures, AAA guidebooks, and specialty travel guides (see questionnaire in Appendix B). The second factor, labeled media advertising, included newspaper advertising, television or radio advertising, newspaper or magazine feature story, and magazine advertising. The third factor was called computer sources and included internet/online sources and CD Roms. The fourth factor was a single item factor representing word of mouth.

The factor analysis from the 13 items that measured information sources used while traveling produced a 4-factor solution. The first factor included sources of information provided by public institutions and included information from Chambers of Commerce and welcome centers. The second factor was labeled travel guides and included regional travel guides, AAA guides, highway maps, and attractions brochures. The third factor included information from friends and information from local news sources. The last factor was called local service employees and included information attained from gas station attendants and hotel clerks.

Finally, the factor analysis of the 15-item list of leisure activities produced a 4-factor solution. The first factor included the water-based outdoor activities: swimming, fishing, water skiing, sailing, canoeing, and windsurfing. The second factor included land-based outdoor activities such as hiking, watching wildlife, golf, tennis, and horseback riding. There was a general tourist activity factor that included arts and crafts events, pleasure driving, heritage tourism, factory tours, and shopping. Finally, the special events factor included attending concerts or performing arts, and attending festivals or fairs.

Analysis of Variance. Analysis of variance is a technique that compares the mean responses between different subsets of the sample. For example analysis of variance was used to test for differences

between business travelers and pleasure travelers. Analysis of variance yields a F statistic. A larger F value means that the difference was statistically stronger or more significant.

The use of analysis of variance with these data present some limitations. Analysis of variance as a statistical technique assumes equal variation between different groups in a comparison. Unequal sample sizes between different groups, however, can often lead to unequal variation in the distribution of variables. This may be a problem when comparing responses of passengers at the different Ferries. The Grand Isle/Plattsburgh crossing had 820 people in its sample, while the Burlington/Port Kent crossing had 106 people in its sample. Typically, larger samples have less variation, and consequently better reliability than smaller sample sizes. This may also be problematic when comparing visitors to the different tourist attractions. There were 164 people in the sample who visited Shelburne Museum while on 21 people visited the Clinton County Museum and 29 people who visited the Alice T. Miner Museum. This means that average responses from the Shelburne Museum sample are more reliable than average responses from the Clinton County Museum or Alice T. Miner Museum samples. Consequently comparisons become more difficult when the average responses are less reliable.

While analysis of variance is fairly robust to this problem, there are statistical tests that can handle this problem of unequal variance. This analysis therefore used a Tamehane T2 test, which is a more conservative test of difference between two means that does not assume equal variance.

APPENDIX B
QUESTIONNAIRE - ENGLISH VERSION

We would like to find out about any previous experience you may have had riding any of the three Lake Champlain Ferries: Grand Isle, VT to Plattsburgh, NY, Burlington, VT to Port Kent, NY, or Charlotte, VT to Essex, NY.

1. How did you first learn of the Lake Champlain Ferries? (CHECK ONLY ONE)

- Lake Champlain Ferries Brochure
 From friends or family members
 Newspaper advertising
 Magazine advertising
 I live in the area and have always known about it
 Television advertising
 Radio advertising
 Saw it on a map
 Highway signs
 Regional Travel Guide
 Other (Please List) _____

2. In what year did you first ride any of the 3 Lake Champlain Ferries? _____

3. How many times have you been on any of the 3 Lake Champlain Ferry crossings?

	Grand Isle/ Plattsburgh	Burlington/ Port Kent	Charlotte/ Essex
Never	_____	_____	_____
1st Trip	_____	_____	_____
2 to 5 Times	_____	_____	_____
6 to 12 Times	_____	_____	_____
13 to 24 Times	_____	_____	_____
25 to 50 Times	_____	_____	_____
50 to 100 Times	_____	_____	_____
100 to 200 Times	_____	_____	_____
200 to 500 Times	_____	_____	_____
More than 500 Times	_____	_____	_____

4. How often do you ride any of the 3 Lake Champlain Ferry crossings?

	Grand Isle/ Plattsburgh	Burlington/ Port Kent	Charlotte/ Essex
Never	_____	_____	_____
Once every few years	_____	_____	_____
Once a year	_____	_____	_____
Once every few months	_____	_____	_____
Once a month	_____	_____	_____
Once every other week	_____	_____	_____
Once a week	_____	_____	_____
Once every few days	_____	_____	_____
Every working day (commuter)	_____	_____	_____

We would like to know about your trip today riding the Lake Champlain Ferries.

1. How many minutes did you have to wait before boarding the Ferry? _____

2. Including yourself, how many people are traveling in your group today?

_____ ADULTS

_____ CHILDREN

3. On your trip today, are you traveling to a destination beyond either Vermont or the New York Adirondack Region?

_____ NO

_____ YES

4. Have you ever noticed the travel information signs at any of the three Ferry landings that advertise the Ferry's radio broadcast?

_____ NO

_____ YES

5. Have you ever listened to the Lake Champlain Ferry’s travel information radio broadcast on your car radio as you waited for the Ferry?

- NO
- YES -----> IF YES, Was the information helpful as you traveled?
 - NO
 - YES

6. Please tell us your opinions about the facilities and services on the Lake Champlain Ferries.

	Poor			
		Fair		
Employee courtesy.....	1	Good	2 3	45
Cleanliness of the landings.....	1		2 3	45
Cleanliness of the boat.....	1		2 3	45
Food service at the landings.....	1	Very Good	2 3	45
Availability of restrooms.....	1		2 3	45
			Excellent	

7. I am crossing Lake Champlain today because I am: (CHECK ONLY ONE)

- Commuting to work
- Traveling on a one day business trip
- Traveling on a multi-day business trip
- Traveling on a one day pleasure trip
- Traveling on a multi-day pleasure trip or vacation

If you are commuting to work, please skip to the background section on Page 8.

If you are traveling on a business trip, pleasure trip, or vacation please proceed to the next page.

We would like to know more about your current business trip, pleasure trip, or vacation to the Lake Champlain Region.

1. How frequently have you visited the Lake Champlain Region in the past?

- Never
- Rarely
- Occasionally-once every few years
- Often - once every year or two
- All the time - more than once a year
- I am a permanent resident in the Lake Champlain Basin

2. What are/were your main travel destinations on this trip? (CHECK ALL THAT APPLY)

- Burlington, VT region
- Central Vermont mountains (Stowe, Waterbury, Mad River Valley)
- Vermont State Capitol Region (Montpelier, Barre)
- South Central Vermont mountains (Killington, Woodstock, White River Jct.)
- Southern Vermont (Manchester, Bennington Brattleboro)
- Northeast Kingdom, VT
- Plattsburgh, AuSable, NY region
- Central Adirondack region (Blue Mountain Lake, Indian Lake)
- Ticonderoga, Crown Point, NY region
- Northern Adirondack region (Saranac Lake, Tupper Lake, Lake Placid)
- Southern Adirondack region (Lake George area)
- I am passing through the Lake Champlain region enroute to another destination.
WHAT DESTINATION? _____

3. What overnight accommodations did you use while traveling in the Lake Champlain region?

- Day trip, I did not stay overnight
- Hotel/Motel
- Bed and Breakfast or Country Inn
- Residence of a friend or a relative
- A vacation home that your family or friend owns
- A rented cabin, cottage or home
- Resort
- Condominium rental or time share
- Campground
- Other (Please describe) _____

4. What sources of information did you use to help plan your current trip or vacation?
(CHECK ALL THAT APPLY.)

- Newspaper advertising
- Travel brochures from individual attractions or businesses
- Television or radio advertising
- Travel agent
- Business contacts
- Automobile Club directories
- Magazine advertising
- Regional travel guidebooks
- Maps (Highway maps, travel maps)
- Specialty travel guides (Heritage tour guides, shopping guides, etc.)
- Word of Mouth
- Newspaper or magazine feature stories
- 1-800 information request phone numbers
- Internet/Online services
- CD Roms
- Other (Please Describe) _____

5. What sources of travel information did you use after you arrived in the Lake Champlain region? (CHECK ALL THAT APPLY).

- Highway maps or Travel maps
- Chamber of Commerce information centers
- Gas station or retail store attendants
- Local newspapers
- Business contacts
- Travel brochure stands
- Interstate Welcome Centers
- Automobile Club directories
- Regional travel guidebooks
- Advise from friends or acquaintances
- Kiosks
- Hotel desk clerks
- Lake Champlain Basin Historic Sites Booklet
- Other (Please Describe) _____

6. We are interested in knowing about your travel activities on your current trip. What activities did you, or will you, participate in during your current pleasure trip, business trip, or vacation? (CHECK ALL THAT APPLY.)

- Attending concerts or performing arts
 Hiking, Climbing, etc.
 Visiting museums or historic places
 Factory tours
 Artisans and crafts people
 Business meeting
 Fishing or hunting
 Outdoor sports (golf, tennis, horseback riding, etc.)
 Observing wildlife/bird watching
 Shopping (WHERE?) _____
 Pleasure driving/Sightseeing
 Swimming or sunbathing
 Visiting night clubs or other night time entertainment
 Water sports (windsurfing, water skiing, sailing, canoeing, scuba diving)
 Attending festivals, fairs, expositions, or other special events
 Other (Please Describe) _____

7. Please tell us if you have visited, or plan to visit, any of the following attractions during your trip. (CHECK ALL THAT APPLY).

- | | |
|--|---|
| <input type="checkbox"/> Shelburne Museum | <input type="checkbox"/> Alice T. Miner Museum |
| <input type="checkbox"/> Ft. Ticonderoga | <input type="checkbox"/> Santas Workshop (@ Whiteface Mtn.) |
| <input type="checkbox"/> The Great Escape | <input type="checkbox"/> Ben & Jerry's Ice Cream Factory |
| <input type="checkbox"/> Clinton County Museum | <input type="checkbox"/> Church Street Marketplace (Burlington, VT) |
| <input type="checkbox"/> Kent de Lord House | <input type="checkbox"/> Lake Placid Olympic Attractions |
| <input type="checkbox"/> AuSable Chasm | <input type="checkbox"/> Vermont Teddy Bear Factory |
| <input type="checkbox"/> Crown Point | <input type="checkbox"/> The Christmas Loft (Shelburne, VT) |
| <input type="checkbox"/> High Falls Gorge | <input type="checkbox"/> Lake Champlain cruises |
- Other Historic Sites _____
 Other Natural Attractions _____
 Other Built Attractions _____

8. We are interested in knowing how much money you will have spent on your current pleasure trip or vacation. If you are currently returning home from your trip, please estimate how much money you have spent on this trip in each of the following categories. If you are currently departing on your trip, please tell us how much money you have budgeted for each of the following categories.

- \$ _____ Transportation
- \$ _____ Food
- \$ _____ Lodging
- \$ _____ Retail purchases
- \$ _____ Entertainment and recreation
- \$ _____ Other (Please Specify) _____

_____ I am estimating how much money I have spent on this trip
 _____ I am estimating how much money I have budgeted to spend on this trip

9. We would like to find out about your interest in various kinds of specialty travel. Please tell us how interested you are in participating in the following types of special tours or specialty vacations:

Not at all Interested
 Slightly Interested
 Moderately Interested

	Very Interested			
	1	2	3	4
Heritage Tourism or Historic Vacations.....	1	2	34	
Ecotourism.....	1	2	3	4
Watchable Wildlife.....	1	2	3	4
Factory Tours or Industrial District Tours.....	1	2	3	4
Agricultural Tourism or Working Farms.....	1	2	3	4
Sports tourism (Athletic events and Training Centers)	1	2	3	4
Gambling Casinos.....	1	2	3	4

10. So far on your trip, how would you rate the following travel-related services?

Poor

Fair

Conditions of roads and highways.....	1	2	3	45
Hospitality of the local people.....	1	Good 2	3	45
Value for your money.....	1	2	3	45
Variety of things to do and see.....	1	Very Good 2	3	45
Availability of travel information.....	1	2	3	45
Highway and directional signs.....	1	Excellent 2	3	45
Scenic Overlooks.....	1	2	3	45

In this final section, we would like to ask you some questions about your background to better plan our marketing and service efforts. We stress that all of your answers are strictly confidential.

1. Are you _____ Male _____ Female

2. In what year were you born? _____

3. How many years of school have you completed?

- | | |
|----------------------------|---------------------------|
| _____ 8th Grade | _____ Some College |
| _____ Some high school | _____ B. A. Or equivalent |
| _____ High school graduate | _____ Graduate degree |

4. Please check the space that comes closest to your total family income before taxes.

- | | |
|----------------------------|-----------------------------|
| _____ under \$16,000 | _____ \$64,000 to \$79,999 |
| _____ \$16,000 to \$31,999 | _____ \$80,000 to \$95,000 |
| _____ \$32,000 to \$47,999 | _____ \$96,000 to \$150,000 |
| _____ \$48,000 to \$63,999 | _____ over \$150,000 |

5. How many children under age 18 do you have? _____

6. Where do you presently live?

- Farm or rural area
- Small town (less than 5,000 people)
- Small city (5,000 to 50,000 people)
- Large city (50,000 to 500,000 people)
- Major metropolitan city (over 500,000 people)
- Suburb (within 15 miles of a large or metropolitan city)

7. What is your zip code or postal code? _____

PLEASE USE THE FOLLOWING SPACE FOR ANY COMMENTS YOU WOULD LIKE TO MAKE.

FRENCH VERSION

Nous aimerions connaître vos impressions suite à votre croisière sur l'un des trois traversiers du lac Champlain: Grand Isle/Vermont à Plattsburgh/New York, Burlington/Vermont à Port Kent/New York ou Charlotte/Vermont à Essex/New York.

1. Ou avez-vous entendu parier des traversiers du lac Champlain la toute première fois? (COCHEZ UNE SEULE CASE.)

- Brochure des traversiers du lac Champlain
 Amis ou membres de ma famille
 Publicité dans les journeux
 Publicité dans les revues
 J'habite la région et connaît ce service depuis toujours
 Publicité à la télévision
 Publicité à la radio
 Je _ai trouvé sur une carte routière
 Pancartes sur l'autoroute
 Guide touristique de la région
 Autre (veuillez préciser) _____

2. En quelle année avez-vous utilisé l'un des trois traversiers du lac Champlain pur la toute première fois?

3. À combien de reprises avez-vous utilisé chacun des trois traversiers du lac Champlain?

	Grand Isle/ Plattsburgh	Burlington/ Port Kent	Charlotte/ Essex
Jamais	_____	_____	
Première fois	_____	_____	
2 à 5 fois	_____	_____	
6 à 12 fois	_____	_____	
13 à 24 fois	_____	_____	
25 à 50 fois	_____	_____	
50 à 100 fois	_____	_____	
100 à 200 fois	_____	_____	
200 à 500 fois	_____	_____	
Plus de 500 fois	_____	_____	

4. À quelle fréquence utilisez-vous chacun des 3 traversiers du lac Champlain?

	Grand Isle/ Plattsburgh	Burlington/ Port Kent	Charlotte/ Essex
Jamais	_____	_____	
Une fois tous les ans	_____	_____	
Une fois par an	_____	_____	
Une fois tous les mois	_____	_____	
Une fois par mois	_____	_____	
Une fois tous les semaines	_____	_____	
Une fois par semaine	_____	_____	
Une fois tous les jours	_____	_____	
Une fois par jour	_____	_____	
Chaque jour de travail (navette)	_____	_____	

Nous aimerions connaître vos impressions suite à votre croisière d'aujourd'hui sur l'un des traversiers du lac Champlain.

1. Combien de minutes avez-vous attendu avant de pouvoir embarquer sur le traversier? _____

2. Combien de personnes vous accompagnent, incluant vous-même?

_____ ADULTES

_____ ENFANTS

3. Votre destination d'aujourd'hui vous amènera-t-elle plus loin que le Vermont ou la région des Adirondacks de l'état New York?

_____ NON

_____ OUI

4. Avez-vous remarqué à l'un des 3 quais d'embarquement une affiche indiquant le poste-radio des traversiers?

_____ NON

_____ OUI

5. Lorsque vous attendiez le traversier, avez-vous écouté le poste-radio retransmettant les détails des navettes des traversiers du lac Champlain?

NON
 OUI ↪ Si OUI, ces informations ont-elles été utiles à votre voyage?

NON
 OUI

6. Nous aimerons connaître votre opinion sur les installations et services du traversier.

		<i>Médiocre</i>	<i>Pauvre</i>	<i>Bon</i>	<i>Trs Bon</i>	<i>Excellent</i>
Courtoisie des employés	.....1	2	3	4	5
Propreté des quais	.....1	2	3	4	5
Propreté du traversier	.....1	2	3	4	5
Service de restauration aux quais	.....1	2	3	4	5
Accessibilité aux toilettes	.....1	2	3	4	5

7. Aujourd'hui, je traverse le lac Champlain pour la raison suivante: (COCHEZ UNE SEULE CASE.)

- Navette pour aller au travail
 Voyage d'affaire d'une journée
 Voyage d'affaire de plusieurs jours
 Journée de vacances
 Vacances de plusieurs jours
 Autre (veuillez préciser) _____

Si vous utilisez le traversier comme service de navette pour vous rendre au travail, continuez à la section des renseignements généraux, page 7.

Si vous utilisez le traversier pour un voyage d'affaire, par plaisir, ou lors de vos vacances, veuillez continuer à la prochaine question.

Nous aimerions des renseignements additionnels relativement à votre voyage d'affaire, votre journée ou vacances dans la région du lac Champlain.

1. À combien de reprises avez-vous visité la région du lac Champlain?

- Jamais
- Rarement
- Occasionnellement - une fois tous les ans
- Souvent - une fois tous les deux ans
- Fréquemment - plus d'une fois par an
- Je suis un résident permanent de la région

2. Quelle était la destination principale de votre voyage? (COCHEZ PLUS D'UNE CASE SI NÉCESSAIRE)

- Burlington et ses environs
- Montagnes du Vermont, région centrale (Stowe, Waterbury, Mad River Valley)
- Vermont, région du Capitale (Montpelier, Barre)
- Montagnes du Vermont, région sud (Killington, Woodstock, White River Jct.)
- Le sud du Vermont (Manchester, Bennington, Brattleboro)
- Le royaume du nord-est, Vermont
- Plattsburgh, AuSable région New York
- Région centrale des Adirondacks (Blue Mountain Lake, Indian Lake)
- Ticonderoga, Crown Point région de New York
- Les Adirondacks au nord (Saranac Lake, Tupper Lake, Lake Placid)
- Les Adirondacks au sud (région du Lake George)
- La région du lac Champlain fait partie de mon itinéraire
- QUELLE EST VOTRE DESTINATION FINALE? _____

3. Quel service d'hébergement avez-vous utilisé lors de votre passage au lac Champlain?

- Aucun, aller-retour dans la même journée
- Hotel/motel
- Bed & Breakfast ou country Inn
- Résidence d'un ami ou de la famille
- Chalet d'un ami ou de la famille
- Chalet ou maison loué
- Centre de villégiature
- Condo loué ou vacances à temps partagé
- Terrain de camping
- Autre (veuillez préciser) _____

4. Quelles sources d'information avez-vous consultés pour planifier votre voyage ou vacances?
(COCHEZ PLUS D'UNE CASE SI NÉCESSAIRE.)

- Publicité dans les journaux
- Brochures des différents centres d'attractions ou d'affaires
- Publicité à radio ou à la télévision
- Contracts d'affaire
- Club automobile
- Publicité dans les revues
- Guides touristiques de la région
- Cartes (routières et touristiques)
- Guides touristiques spécialisés (guide Héritage, guide des centres d'achats.)
- Bouches à oreilles
- Articles spéciaux dans les journaux ou revues
- Numéro 1-800 d'informations touristiques
- Internet/service ON-LINE
- CD Roms
- Autre (veuillez préciser) _____

5. Une fois arrivé dans la région du lac Champlain, quelles sources d'information avez-vous consultées? (COCHEZ PLUS D'UNE CASE SI NÉCESSAIRE)

- Cartes routières et/ou touristiques
- Centres d'informations de la Chambre de Commerce
- Station d'essence ou employé d'une boutique quelconque
- Journaux de quartier
- Contracts d'affaire
- Brochure d'agence de voyage
- Centre d'information touristique
- Club automobile
- Guides touristiques de la région
- Conseils d'amis ou de connaissances
- Kiosques
- Réception de l'hôtel
- Livret de l'histoire du bassin du lac Champlain
- Autre (veuillez préciser) _____

6. Nous aimerions connaître les activités de votre voyage. Quelles activités avez-vous ou comptez-vous pratiquer lors de votre séjour dans la région? (COCHEZ PLUS D'UNE CASE SI NÉCESSAIRE)

- Concert ou spectacle
 Randonnée pédestre, escalade, etc
 Musée ou lieu historique
 Visites d'entreprises
 Boutique d'artisanat
 Meeting d'affaire
 Chasse et/ou pêche
 Sports extérieurs (golf, tennis, équitation, etc)
 Observation de la nature, des oiseaux
 Magasinage (À QUEL ENDROIT): _____
 Randonnée en voiture, observation de la nature
 Natation, prendre du soleil
 Clubs, bars, ou discothèques
 Sports nautiques (planche à voile, ski nautique, voile, canoë, plongée)
 Festivals, Foires, expositions
 Autre (veuillez préciser) _____
-

7. Nous aimerions connaître les sites que vous avez visités ou comptez visiter lors de votre séjour. (COCHEZ PLUS D'UNE CASE SI NÉCESSAIRE)

- | | |
|---|---|
| <input type="checkbox"/> Musée Shelburne | <input type="checkbox"/> Musée Alice T. Milner |
| <input type="checkbox"/> Fort Ticonderoga | <input type="checkbox"/> Village du Père Noël (Whiteface Mt.) |
| <input type="checkbox"/> Le Great Escape | <input type="checkbox"/> Usine de crème glacée Ben & Jerry |
| <input type="checkbox"/> Musée Clinton County | <input type="checkbox"/> Rue Church et ses boutiques (Burlington) |
| <input type="checkbox"/> Maison Kent de Lord | <input type="checkbox"/> Site Olympique du lac Placid |
| <input type="checkbox"/> Ausable Chasm | <input type="checkbox"/> Usine d'ours en peluche du Vermont |
| <input type="checkbox"/> Crown Point | <input type="checkbox"/> Le Christmas Loft (Shelburne, Vermont) |
| <input type="checkbox"/> La gorge de High Falls | <input type="checkbox"/> Croisières sur le lac Champlain |
- Autres lieux historiques
 Autres sites naturels
 Autres attractions

8. Nous aimerions connaître le montant d'argent que vous aurez dépensé lors de votre séjour. Si vous êtes sur le chemin de retour, veuillez estimer vos dépenses pour chacune des catégories suivantes. Si vous commencez votre séjour dans la région, veuillez compléter la liste ci-dessous selon votre budget pré-établi.

\$ _____ Transport
 \$ _____ Restauration
 \$ _____ Hébergement
 \$ _____ Achats dans les boutiques
 \$ _____ Spectacles et divertissements
 \$ _____ Autre (veuillez préciser)

_____ J'estime le montant d'argent dépensé lors de mon séjour
 _____ J'estime le montant de ce séjour d'après mon budget pré-établi

9. Nous aimerions connaître vos intérêts pour des vacances organisées. Veuillez indiquer votre degré d'intérêt pour chacune des visites guidées ou vacances organisées.

Aucun Intrt
Faible Intrt
Modr Intrt
Grand Intrt

Notre héritage ou visite historique	1	2	3	4
Tourisme écologique (nature, vie animale)	1	2	3	4
Observation des oiseaux	1	2	3	4
Visites d'usines ou d'entreprises.....	1	2	3	4
Visites des fermes (agriculture)	1	2	3	4
Visites sportives (lieux d'entraînement et d'événements)	1	2	3	4
Casinos.....	1	2	3	4

10. Jusqu' à présent, quelle est votre opinion sur les services reliés à votre séjour?

Médiocre
 Pauvre
 Bon
 Très Bon
 Excellent

États des routes	1	2	3	4	5
Hospitalité des résidents	1	2	3	4	5
Taux de change	1	2	3	4	5
Diversité des choses à voir et à faire	1	2	3	4	5
Disponibilité d'informations touristiques	1	2	3	4	5
Signalisation des routes.....	1	2	3	4	5
Beauté du paysage.....	1	2	3	4	5

RENSEIGNEMENTS GÉNÉREAUX- Nous apprécierions des renseignements supplémentaires afin de mieux orienter nos efforts marketing. Toutes les informations recueillies demeureront strictement confidentielles.

1. Êtes-vous: _____ Homme _____ Femme

2. Année de naissance:

3. Années de scolarisation complétées:

_____ Primaire _____ CEGEP (non complété)
 _____ Secondaire (non complété) _____ CEGEP (complété)
 _____ Secondaire (complété) _____ BAC ou équivalent
 _____ Maîtrise ou doctorat

4. Veuillez cocher la case qui représente le mieux votre revenu total familial avant impôts:

_____ moins de \$16,000 _____ \$64,000 à \$79,999
 _____ \$16,000 à \$31,999 _____ \$80,000 à \$95,999
 _____ \$32,000 à \$47,999 _____ \$96,000 à \$150,000
 _____ \$48,000 à \$63,999 _____ plus de \$150,000

5. Combien d'enfants de moins de 18 ans sont à votre charge:

6. Ou habitez-vous présentement?

_____ Ferme ou campagne

_____ Petit village (moins de 5000 habitants)

_____ Village (entre 5000 et 50,000 habitants)

_____ Ville (entre 50,000 et 500,000 habitants)

_____ Métropole (plus de 500,000 habitants)

_____ Banlieue (environ 20 kms de la ville ou métropole)

7. Quel est votre code postal?

VEUILLEZ UTILISER L'ESPACE CI-DESSOUS POUR NOUS FAIRE PART DE TOUT COMMENTAIRE

NOUS VOUS REMERCIONS DE VOTRE COOPÉRATION!

APPENDIX C HANDWRITTEN COMMENTS

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