

Village of Lyons Falls

Brownfield Opportunity Area

Tourism Asset Study

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Executive Summary

The Village of Lyons Falls is rich with intrinsic assets for tourism. Its scenic views and river access, combined with snowy winters and recreational trails, offer visitors activities all year round. It enjoys a central location between the Adirondack Park and the Tug Hill Plateau, where tourism is heavily promoted. Additionally, Lewis County tourism materials highlight multiple Lyons Falls attractions as assets to the county.

An analysis of current market conditions, tourism assets including recreation, cultural, natural, and historic, and types of tourism-related development occurring in the region was commissioned. Three analyses were created for this Tourism Asset Study, together with a series of action recommendations based on the findings. These analyses were:

Tourism Asset Inventory Identified and organized visitor attractions and amenities in Lewis County and Lyons Falls. This inventory is included as Attachment A. Of 112 tourism assets counted in Lewis County, 15 (or 13%) are located in Lyons Falls, including snowmobile and ATV trails, boat launches, scenic views, and dining and lodging at one of the county's best known inns, Boondocks and The Edge. This inventory can be updated regularly to support tourism marketing, and shared to enhance the community's engagement in and appreciation for the assets and amenities already in place, while creating a context for new development.

Tourist Activity Crossover Matrix Grouped visitors by demographics and identified the activities enjoyed by each group, highlighting opportunities to promote "crossover" activities based on visitor preferences. Visitors to Lewis County and Lyons Falls include families, retired couples and couples travelling without children, and singles. All of these groups enjoy scenic views, backpacking, and hiking, and most other activities in the region appeal to more than one group, creating many opportunities for crossover promotion.

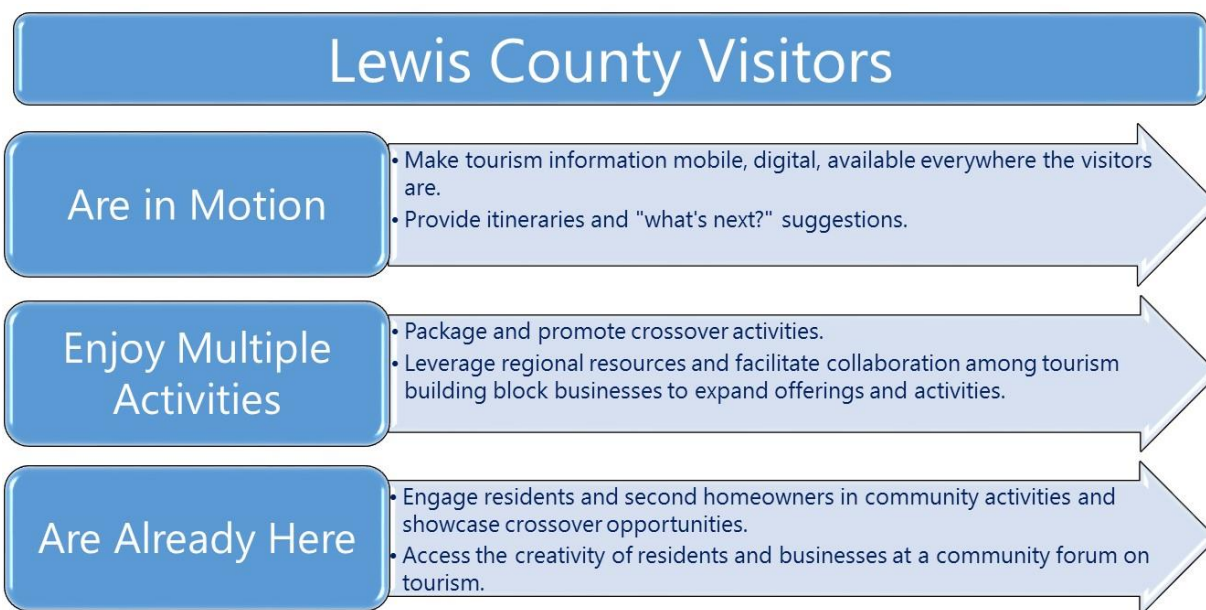
For example, visitors who camp are likely to kayak. Families with children, a major visitor segment for the region, are attracted to both these and a wide range of other activities that can be 1) promoted as part of a family marketing package, and 2) targeted for future investment. This matrix is a tool for the village and community to use for understanding the preferences of visitors, exploring promotion and marketing tactics, and evaluating opportunities for new investment.

Building Blocks of the Tourist Experience Evaluated the types of assets that support tourism and how they interact to create a visitor experience. The building block approach supports the Tourist Activity Crossover Matrix by underscoring how assets such as lodging or wayfinding are accessed by multiple visitor types. Each building block is also a connection to a visitor and is 1) a resource to create an enjoyable experience, and 2) a platform to provide information about crossover activities and Lyons Falls marketing and branding. Understanding the tourism building blocks already in the village, such as restaurants, a movie theatre, and scenic walks and views, highlights existing resources and helps identify gaps. These resources contribute to the local quality of life and can attract new businesses and residents.

Major findings from these analyses are that visitors to Lewis County are mobile and in motion, that they enjoy a wide variety of activities, and that many of them are already living here seasonally in second homes. Another important finding is that visitors to Lewis County spend relatively little money compared

to the rest of the Adirondack Region, totaling \$40.6 million in 2014¹, and actions to promote more spending are a critical component of a visitor strategy.

These major findings guide recommendations for actions that the Village of Lyons Falls can take to enhance the visitor experience and increase tourism spending. In the graphic below, each finding is followed by an arrow summarizing suggested actions.



"[Visitors in Motion](#)" see the method of transportation, by motor or boat or on foot, as more important than the final destination. They may plan to visit multiple attractions, such as hikes, historic sites, or sugarbushes, in a single visit and so spend time at many locations within the county. Visitors should be offered opportunities to add activities, make extra stops, or change their plans when they find something unexpected and appealing. Multiple tactics identified in the Marketing Plan support easy access to the information tourists need. To reach a visitor population that is both on the move and open to discovering new choices, the village can:

- Improve signage to direct their travel and highlight assets, a.k.a. "Wayfinding materials."
- Make information available wherever the visitors are, leveraging cell phones and mobile apps to encourage spontaneity and capture the attention of travelers already in motion.
- Acquire a Quick Response "QR" Code that can be displayed on stickers, brochures, and websites to connect cell phone users to Lyons Falls information.
- Create electronic itineraries instead of lists to suggest activities: "If you use the Upper Boat Launch, you can have lunch first at Marino's Pizza or Dorrity's Restaurant."
- Keep it updated, especially with the many local and regional events throughout the year.
- Keep it branded, making sure that a visitor finds and recognizes Lyons Falls online and sees how many of the activities and amenities he or she is looking for are available right in the village.

¹ By comparison, the next two lowest spending counties had nearly double the spending: \$75 million in Hamilton County and \$79 million in Franklin County.

[“Visitors Enjoying Multiple Activities”](#) means that, while they may plan around a regional strength like snowmobiling or Maple Weekends, they can be encouraged to add crossover activities with initiatives that:

- Identify complementary activities, especially for families, for example highlighting swimming and fishing as well as the village boat launches for full enjoyment of the river.
- Connect visitors to the unexpected with promotions that leverage the Crossover Matrix. Families may plan for high energy outdoor recreation but parents can welcome information about relaxation options such as day spas. Retired couples visiting to see fall foliage are a group that is likely to have the resources to explore horseback riding.
- Expand indoor activities to supplement the visitor experience and encourage spending in all seasons and weather. This can mean new investment, but can also be getting the word out about arts and music performances at historic sites or eateries.
- Build relationships with regional businesses that complement village assets. Short term rental opportunities for kayaks and paddleboards, bicycles, or fishing gear will encourage crossover activities, longer visits, and more spending at village amenities.

[“Visitors Are Already Here”](#) and they be connected to more opportunities to spend time, energy, and money. They should also be valued as a resource for continuous development and discussion:

- Promote community engagement as well as tourism by second homeowners² to encourage longer and more frequent stays, more investment, and participation in a wider variety of activities and events.
- Engage residents about what their friends and family like to do when visiting, and what might encourage them to visit more, stay longer, and suggest Lyons Falls to their friends.
- Bring together residents and businesses, with a visitor summit or forum, to broaden appreciation for the many existing assets, uncover synergies among activities and businesses, and access the creativity of a unique region. The village should keep the conversation going online and in person throughout the year and throughout the community, and invite visitors to join in.

These recommendations are derived from the research and analysis performed, and inspired by the unique characteristics of the village’s and the county’s visitors, activities, and assets: mobility, innovation, and dedication to enjoying and preserving the wild and rural landscape. This Tourism Asset Study should encourage appreciation for the village’s assets, increase understanding about tourism development, and support discussions among community stakeholders.

The [Tourist Activity Crossover Matrix](#) is included on the next page as well as in the report.

² Spending on the purchase, maintenance, and occupation of second homes in Lewis County was \$28 million, compared with \$12.5 million total combined spending on lodging, food, recreation, and retail by all tourists in the county.

Tourist Activity Crossover Matrix - Lyons Falls Assets						
Activity Supported by Assets	Retired Couples, Higher	All Families	Couples, All Incomes, Travelling without Children	Singles	Number of Groups Attracted	Number of Assets in Lyons Falls
<u>Group 1 - Activities That Cross Income Groups</u>						
Scenic & Wildlife Views	1	1	1	1	4	2
Backpacking & Hiking	1	1	1	1	4	1
Museums & Art Galleries	1	1	1		3	1
Historic Sites, Communities, & Landmarks	1	1	1		3	3
Architecture & Archeology	1		1		2	See Historic Sites
Cultural Festivals & Fairs	1		1		2	0
Theatres & Performing Arts	1		1		2	0
Camping		1	1		2	0
Canoeing/Kayaking		1	1		2	4
Cross Country Skiing		1	1		2	1
Fishing		1		1	2	1
ATV Riding		1		1	2	1
Snowmobile Riding		1		1	2	1
Road Biking		1	1		2	1
Hunting		1		1	2	Per DEC regs
Spas & Relaxation	1		1		2	0
Community & Family Festivals & Fairs and Agri-tourism		1			1	4
Swimming		1			1	1
<u>Group 2 - Activities Associated with Higher Incomes or Dedicated Spending</u>						
Golfing	1	1	1		3	0
Mountain Biking		1	1	1	3	0
Whitewater Rafting		1	1	1	3	0
Horse Trails		1	1		2	1
Totals for each group	9	18	16	8		23

Background

A study was commissioned to conduct an analysis of current market conditions, tourism assets including recreation, cultural, natural, and historic, and types of tourism-related development occurring in the region. The purpose of this report is to present major findings and suggest actions the Village of Lyons Falls can undertake or support to expand local tourism. The following tasks were performed to create this report:

- Collected and reviewed existing tourism industry documents for the region and New York State, including prior reports created to guide tourism development and web-based visitor information sites.
- Interviewed stakeholders and held discussions with the Steering Committee to gain local perspectives and insights on the community and its goals and strengths.
- Developed a framework for understanding how types of businesses related to tourism, defining assets broadly to show the breadth of businesses and resources with the potential to support and expand tourism in the Village of Lyons Falls.
- Created an inventory of current tourism-related businesses and activities.
- Identified preliminary recommendations for village actions based on who visits, what they do, and what other “crossover activities” can be promoted to encourage longer stays, more spending, and an improved visitor experience.

Introduction -- Reframing Tourism: Community Perspectives

Lyons Falls has unusual and valuable scenic resources in its falls and river confluence, and recreational resources based on its position near both flatwater and wild sections of the Black River. The village encompasses thoroughfares for foot, hoof, boat, and motorized recreational vehicle traffic and is targeted by the Black River Trail Development Plan³ (hereafter the “Blueway Report”), the Black River Scenic Byway, and the Lewis County Strategic Tourism Report⁴ (hereafter the “Lewis County Tourism Report”) as an ideal site for development of attractions and businesses to increase tourism.

A purpose of this study is to identify resources and strengths specific to Lyons Falls, and to create a three-way bridge uniting:

- Regional perspectives and resources,
- Opportunities for Lyons Falls, and
- Benefits for the Lyons Falls community.

The Steering Committee has expressed its support for developing outdoor and recreational tourism, and identified Backcountry and Adventure Tourism as a targeted industry for the BOA Step 3 analysis and report. It has asked for a tourism “deep dive” industry analysis as well as this Tourism Asset Study, and participated in and encouraged discussions of tourism with community stakeholders to support this study. The perspectives of the Village of Lyons Falls serve as guides for this report, so it begins with those ideas.

³ (White - Still - & Wild, A Blueway Trail Development Plan for the Black River in Oneida, Lewis and Jefferson Counties New York State, 2007)

⁴ (2011 Strategic Tourism Report, Prepared for the Lewis County Legislature, 2011)

Community Feedback

Meetings with the project Steering Committee as well as interviews with key Stakeholders identified assets, opportunities and needs, and challenges within the community. Insights from telephone interviews conducted have also been incorporated into this report.

At the July 26 meeting of the Steering Committee, preliminary findings from the market analysis were presented, followed by discussion of potential industries for further analysis, including types of tourism. Committee discussion of tourism opportunities and challenges suggested five themes:

1. Tourism is recognized as one of the biggest development opportunities in Lyons Falls, but there is concern about tourism jobs being largely seasonal and paying lower wages than those of many other industries, particularly manufacturing.
2. Visitors to Lyons Falls are believed to come largely for the snowmobiling and ATV trails, which is consistent with Lewis County's and the region's high average snowfall and active motorized sports organizations.
3. River- and trail-based activities are popular but attract fewer visitors and are not well supported by amenities such as restaurants, canoe/kayak transport for one-way paddlers, or campsites accessible from the river.
4. While Lyons Falls offers visitors a range of outdoor recreation activities that are attractive to groups and families, visitors inspired by local assets such as the snowmobiling trails but who want a mixed recreation/dining/shopping/relaxation experience are not able to find it. This is recognized to be in part because dining and shopping opportunities are currently limited, but also because information about additional experiences is not well distributed. The village believes visitors will, and should, come for one activity but find another to make them want to stay, spend, and return. Market segmentation analysis of the types of tourists who visit the region show that visitors are attracted to multiple activities.
5. Visitors to Lyons Falls include more than one group. Tourists are visitors who come for activities or events and stay for short periods. Key groups who appreciate the same activities and amenities as tourists, and who can be encouraged to spend more time and resources in the village, and develop a closer relationship to the community, include:
 - o Second homeowners, who are already seen as an important segment of the visitor population and a major part of the real estate market, making contributions to the real property tax base as well as purchasing goods and services.
 - o Family and friends visiting local residents who seek entertainment and recreation opportunities during their visits and who encounter the same gaps in amenities as short term visitors.

Stakeholder Perspectives

Some of the stakeholders interviewed are engaged in tourist activities, and other interviewees provided insight into tourism and the community's ideas about tourism without being actively involved. Their perspectives include:

- Lyons Falls has a wide variety of amenities for a village its size, including a car wash, pharmacy, bank, hardware store, health clinic, post office, and restaurants.
- Old Forge, approximately 35 miles away in Herkimer County, is considered to be very different even though it shares some of the same intrinsic outdoor resources; "There is something going on there all the time," and outdoor activities are complemented by small shops.

- The village needs not just more amenities (restaurants, bars) and attractions (boat or paddleboard rental) but also better signage along Route 12 to draw visitors in, and signs within the village to guide these visitors to existing destinations.

Takeaways from Community Perspectives

The community's discussions demonstrate creativity and optimism but are grounded in the practical:

- Leverage existing assets in a way that is consistent with the scale of village life;
- Involve local organizations;
- Create something new, but invite people to visit what is already here.

Stakeholders expressed shared goals and needs regarding tourism and quality of life in the village. Retail amenities, such as a bakery and grocery, better lighting, more restaurant choices, and better recreational access to the river are all facets that would appeal to visitors and residents alike. This is part of an answer to "Why is tourism good for our community?" For the types of tourism development that stakeholders are talking about, some of the benefits are already well understood in the community.

Part 1 –Tourism Economic Trends

This section of the report presents an overview of regional and county tourism trends and economic impacts and includes a discussion of how they are measured.

The State of New York publishes an annual tourism economic impact study⁵ using consistent criteria and measurements. The entire state is presented every year, and periodically an analysis of one region is prepared, with information at the county level. This tourism asset study uses impacts and statistics from the state studies, which are focused on visitor spending and the multiplier effects of that spending, to show how tourism dollars flow into communities.

Measuring the Economic Impact of Tourism

The regional tourism trends section of this report uses definitions from the annual *Economic Impact of Tourism in New York* reports:

Direct spending is traveler purchases of goods and services and is divided into five categories: lodging, food service, transport, retail and service (gasoline) stations, and recreation. Within these sectors tourism spending supports jobs, wages, and taxes.

Indirect impacts arise from purchases of goods and services by businesses serving the tourists, for example food wholesalers, utilities – or kayaks for rental.

Induced impacts arise from spending by employees, both of businesses that directly serve tourists and of businesses that earn income from the indirect impacts.

The impacts are summarized in a “**multiplier effect**” that estimates the total economic effect of each dollar spent by a tourist as it works its way through direct, indirect, and induced activities. According to the Blueway Report⁶, tourism spending in Lewis and Jefferson Counties has a 1.3 multiplier effect, meaning that for every \$1 spent directly on tourism, \$1.30 of economic activity is created. Of this, \$0.08 is revenue for local governments from sales, occupancy, and property taxes.

Tourism Spending and its Economic Impact

Using statistics from the state’s 2014 Tourism Economic Impact study, which included an appendix detailing tourism in the Adirondack region, a snapshot of data shows the effects of tourism spending:

Table 1: Lewis County Tourism Impacts 2014

Lewis County Tourism Impacts, 2014	
Category	Amount
Direct Spending	\$40,591,000
Direct Jobs	394
Indirect Jobs	565
Local Taxes	\$3,102,070
State Taxes	\$2,215,798
Tax Savings Per Household	\$502
Economic Multiplier	1.3

Source: The Economic Impact of Tourism in NY, 2015

Table 1 provides a snapshot of tourism’s impacts in Lewis County. \$40.6 million in direct spending supported 394 direct jobs and more than \$3 million in taxes for municipalities, for a tax savings per household of \$502 in 2014.

⁵ (The Economic Impact of Tourism in New York, 2015 Calendar Year, 2015)

⁶ (White - Still - & Wild, A Blueway Trail Development Plan for the Black River in Oneida, Lewis and Jefferson Counties New York State, 2007, p. 44)

Tourism has been a growing industry in the state, with traveler spending increasing between 2014 and 2015 by 1%. Table 2, below, shows a change in total spending from \$62 billion to \$63 billion. Gasoline prices were lower than the prior year, reducing the dollars visitors spent to travel the same distances. Spending on goods and services not including gasoline increased by 3.8%, but that overall increase was substantially offset by the lower gasoline costs, reducing the total increase to 1%. Since 2010, total direct spending has increased by 26.7%. The table below shows tourism spending across five categories: transport, lodging, food service, recreation, and retail and service station purchases.

Dollars in Table 2 through Table 6 are shown in millions, so \$63,077 million Total Spending is \$63,077,000,000, or just over \$63 billion.

Table 2: Statewide Tourism Spending 2010 - 2015

Statewide Tourism Spending 2010 - 2015 - Direct Sales, \$ Millions							
Year	Transport	Lodging	Food Service	Recreation	Retail & Service Station	Total Spending	Annual Change, Total Spending
2010	\$10,108	\$13,873	\$11,313	\$4,817	\$9,664	\$49,775	
2011	\$10,875	\$15,155	\$11,806	\$5,019	\$11,055	\$53,910	8.3%
2012	\$11,504	\$16,267	\$12,379	\$5,332	\$11,775	\$57,257	6.2%
2013	\$11,740	\$17,180	\$12,953	\$5,498	\$11,874	\$59,245	3.5%
2014	\$12,473	\$18,292	\$13,676	\$5,863	\$12,152	\$62,456	5.4%
2015	\$12,853	\$18,714	\$14,502	\$6,183	\$10,825	\$63,077	1.0%
Change 2010 - 15	27.2%	34.9%	28.2%	28.4%	12.0%	26.7%	

Source: *The Economic Impact of Tourism in NY, 2015*

Total direct sales can be broken out by region for the period 2011 – 2014. Adirondack region tourism direct spending grew 9.3% to \$1,295,000,000, or almost \$1.3 billion.

Table 3: Regional Tourism Spending

Regional Tourism Spending - All Regions, Total Direct Sales, \$ Millions					
	2011	2012	2013	2014	2011 - 2014 Change
Chautauqua-Allegheny	\$493	\$498	\$520	\$548	11.2%
Greater Niagara	\$2,122	\$2,232	\$2,283	\$2,375	11.9%
Finger Lakes	\$2,714	\$2,768	\$2,810	\$2,919	7.5%
Thousand Islands	\$456	\$481	\$467	\$498	9.2%
Adirondacks	\$1,186	\$1,232	\$1,258	\$1,295	9.3%
Central New York	\$1,830	\$1,922	\$1,925	\$2,016	10.2%
Capital-Saratoga	\$1,629	\$1,690	\$1,722	\$1,821	11.8%
Catskills	\$1,030	\$1,071	\$1,101	\$1,129	9.6%
Hudson Valley	\$3,066	\$3,155	\$3,191	\$3,318	8.2%
Long Island	\$4,836	\$5,141	\$5,281	\$5,326	10.1%
New York City	\$34,549	\$37,069	\$38,687	\$41,210	19.3%
Totals	\$53,910	\$57,257	\$59,245	\$62,456	15.9%

Source: *The Economic Impact of Tourism in NY, 2015, 2014, and 2013 reports*

The Adirondack region was studied in detail in the state's 2014 report. Tourism spending in Lewis County exceeded \$40.6 million, **with 70% of tourism-related spending for the entire county, equal to \$28 million, coming from the purchase, maintenance, and occupation of second homes**. Food and beverage, and lodging, at just over \$4 million each are the next highest spending categories.

Table 4: Adirondack Region 2014 Tourism Spending by Category, \$ Millions

Adirondack Region 2014 Tourism Spending by Category, \$ Millions							
	Lodging	Recreation	Food & Beverage	Retail and Service	Transport	Second Homes	Total
Clinton	\$35.7	\$3.9	\$32.4	\$24.2	\$19.2	\$15.9	\$131.2
Essex	\$159.0	\$31.0	\$75.5	\$87.2	\$5.4	\$50.1	\$408.1
Franklin	\$14.3	\$5.0	\$21.2	\$14.7	\$0.1	\$23.4	\$78.7
Hamilton	\$14.5	\$2.3	\$7.4	\$8.0	\$0.4	\$42.4	\$75.0
Lewis	\$4.3	\$0.4	\$4.4	\$3.4	\$0.0	\$28.1	\$40.6
Warren	\$225.4	\$12.8	\$121.5	\$115.1	\$17.1	\$64.8	\$556.7
Totals	\$453.2	\$55.4	\$262.4	\$252.5	\$42.2	\$224.6	\$1,290.3

Source: *The Economic Impact of Tourism in NY, 2014 report*

The next table shows the same categories, but as a percentage of tourism spending. This highlights the importance of second home spending to Lewis County, which provided 69% of tourism direct spending. By contrast, Clinton, Essex, and Warren Counties only receive 12% of tourism spending from second home owners, and the average is 32%. Lewis County's lodging and food and beverage sectors are relatively smaller than those of other counties and the averages. Averages in this table are calculated by adding the percentages from each county and dividing by six; they are not weighted by the amount of spending in each county.

Table 5: Adirondack Region 2014 Tourism Spending by Category, Percent

Adirondack Region 2014 Tourism Spending by Category, Percent							
	Lodging	Recreation	Food & Beverage	Retail and Service	Transport	Second Homes	Total
Clinton	27%	3%	25%	18%	15%	12%	100%
Essex	39%	8%	18%	21%	1%	12%	100%
Franklin	18%	6%	27%	19%	0%	30%	100%
Hamilton	19%	3%	10%	11%	1%	57%	100%
Lewis	11%	1%	11%	8%	0%	69%	100%
Warren	40%	2%	22%	21%	3%	12%	100%
Average	26%	4%	19%	16%	3%	32%	

Source: *The Economic Impact of Tourism in NY, 2014 report*

Direct spending on tourism in Lewis County, totaling \$40.6 million, generated another \$18.9 million of economic impact; \$13.6 million labor income, \$3.1 million local taxes, and \$2.2 million state taxes. Dividing total non-direct spending by direct spending, \$0.50 additional impact is generated for each tourism dollar. 565 persons were directly or indirectly employed.

Table 6: 2014 Tourism Spending Impact – Adirondack Region

2014 Tourism Spending Impact - Adirondack Region by County, \$ Millions						
	Direct Spending, Millions	Labor Income, Millions	Local Taxes, Millions	State Taxes, Millions	Labor and Taxes for Every \$ Direct Spending	Employment, Persons
Clinton	\$131.2	\$62.9	\$8.7	\$7.2	\$0.6	2,647
Essex	\$408.1	\$191.4	\$28.3	\$22.3	\$0.6	6,352
Franklin	\$83.7	\$36.5	\$5.4	\$4.6	\$0.6	1,668
Hamilton	\$75.0	\$26.5	\$4.7	\$4.1	\$0.5	936
Lewis	\$40.6	\$13.6	\$3.1	\$2.2	\$0.5	565
Warren	\$556.7	\$259.0	\$38.8	\$30.4	\$0.6	9,036
Totals	\$1,295.3	\$590.0	\$89.0	\$69.7		21,203

Source: *The Economic Impact of Tourism in NY, 2014 report*

Part 2 –Tourism Industries and Occupations

This section of the study presents an overview of the tourism industry and jobs, and discusses how tourism jobs fit within a development strategy.

Tourism Industries

The “Tourism Industry” is a summary phrase for a group of industries and varies analysis by analysis, particularly for regional studies. For this report, 22 industries have been selected as being primarily or very strongly supported by visitors to Lyons Falls and Lewis County, even though, as noted above, many amenities serve both visitors and residents. The industries are identified by 4-digit NAICS⁷ codes. All data collected for this part of the analysis is for Lewis County, not the 5-county economic region presented in the Market Analysis⁸.

Some industries are directly associated with tourism, while others can attract visitors but still service local residents. The following guidelines were used:

Primarily Visitors

- Accommodations
- Specific transportation methods such as charter buses and tours
- Amusement and recreation activities
- Museums and historic sites

Visitors and Residents

- Restaurants and bars
- Gasoline and service stations
- Entertainment such as films and performing arts

⁷ North American Industrial Classification System, information at <http://www.census.gov/eos/www/naics/>

⁸ Lewis County has the smallest tourism economy of the Adirondack region. Studying data within the entire economic region risks obscuring the more local story of the activities and industries. This is particularly important for identifying growth, need, and opportunity for Lyons Falls.

- Retail that supports visitor activities and resident leisure, e.g. specialty food, sporting goods, beer, wine and liquor stores

Not Included

- General retail such as grocery stores and dollar stores: the majority of purchases are by local residents.

Special Industries

- *Cultural and heritage tourism.* These subsectors are identified in the Lewis County Strategic Tourism report⁹ as an opportunity area for the county, and Lyons Falls' industrial heritage and history supports that perception. At the same time, these resources make a substantial contribution to the quality of life for local residents. To reflect this, physical sites that may be visited a few times, such as museums and historic sites, are considered to serve primarily visitors. Annual cultural festivals are included with sites. Periodic activities such as performing arts companies, and independent artists, writers, and performers are included in mixed visitor and resident.
- *Small business.* In various government filings, each business selects its own NAICS code from a list of choices. Small businesses, particularly enterprises with multiple functions but a single location, such as The Highmarket Inn/ Highmarket Sports and Racing in Constableville, choose a single primary function. This can have the effect of "hiding" important secondary business activities in reported data. Newly formed businesses that have not yet selected a NAICS code may appear in statistical databases as "Unclassified Industry." The database used for industry analysis in this report assigns a NAICS code of 9999 to these businesses; this code is not included in the 22 assigned to tourism.

The table below presents the 22 industries selected to define tourism for this study, with the number of jobs for each in Lewis County. Lewis County and Lyons Falls do not necessarily have representatives of every selected industry at this point, but this set of 22 industries can be compared to other communities, and across time.

Table 7 below sorts industries first by whether each is expected to serve primarily visitors or a mixed visitor/resident market, then by total jobs as of 2015. Net visitor-oriented jobs in Lewis County dropped by 15 between 2011 and 2015¹⁰, while mixed-oriented jobs were stable overall, with gains in gasoline stations offsetting losses in restaurants, drinking places, specialty foods, and sporting goods.

The compact size of the county's tourism economy makes minimal changes, such as the loss of 6 jobs in Traveler Accommodation, stand out more than they would in a larger community¹¹. Without diminishing the significance of those 6 jobs, it is important to note that the mixed visitor/resident businesses appear not just to comprise the majority of jobs (79%), but also represent a more stable source of employment because residents spend throughout the year. Steering Committee and stakeholder input already identified amenities that fall within this group as development goals for the community.

⁹ (2011 Strategic Tourism Report, Prepared for the Lewis County Legislature, 2011)

¹⁰ Other Amusement and Recreation includes golf courses and country clubs, skiing facilities, marinas, fitness and recreational sports centers, bowling centers, and others that do not fit within those categories.

¹¹ Certain industries in Lewis County were classified by EMSI as having "fewer than 10" jobs. For this table it is assumed that there are 6 jobs in: Beer, wine and liquor stores, spectator sports, independent artists, and museums.

Table 7: 22 Industries Selected for Tourism Analysis

22 Industries Selected for Tourism Analysis with 2011 and 2015 Lewis County Jobs					
NAICS	Description	2011 Jobs	2015 Jobs	2011 - 2015 Change	Primary Market Served
7211	Traveler Accommodation	84	78	(6)	Visitor
7139	Other Amusement and Recreation Industries	58	44	(14)	Visitor
7212	RV (Recreational Vehicle) Parks and Recreational Camps	26	31	5	Visitor
7121	Museums, Historical Sites, and Similar Institutions	6	6	0	Visitor
4855	Charter Bus Industry	0	0	0	Visitor
4871	Scenic and Sightseeing Transportation, Land	0	0	0	Visitor
4872	Scenic and Sightseeing Transportation, Water	0	0	0	Visitor
4879	Scenic and Sightseeing Transportation, Other	0	0	0	Visitor
Subtotal	Primary Market is Visitors	174	159	(15)	
7225	Restaurants and Other Eating Places	372	367	(5)	Mixed
4471	Gasoline Stations	131	152	21	Mixed
7224	Drinking Places (Alcoholic Beverages)	38	32	(6)	Mixed
4452	Specialty Food Stores	18	14	(4)	Mixed
4511	Sporting Goods, Hobby, and Musical Instrument Stores	19	14	(5)	Mixed
4453	Beer, Wine, and Liquor Stores	6	6	0	Mixed
7112	Spectator Sports	6	6	0	Mixed
7115	Independent Artists, Writers, and Performers	6	6	0	Mixed
5615	Travel Arrangement and Reservation Services	0	0	0	Mixed
7111	Performing Arts Companies	0	0	0	Mixed
7113	Promoters of Performing Arts, Sports, and Similar Events	0	0	0	Mixed
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	0	0	0	Mixed
7131	Amusement Parks and Arcades	0	0	0	Mixed
7132	Gambling Industries	0	0	0	Mixed
Subtotal	Primary Market is Visitors and Residents	597	597	(0)	
Totals	Visitor and Mixed Visitor/Resident Markets*	771	755	(16)	

Source: EMSI

* Numbers may not total due to rounding

A note on EMSI vs. NYS Tourism Economic Impact Study data: Jobs here are not directly comparable with NYS studies discussed in Part 1. This table shows 755 jobs assigned to the tourism economy, compared with 565 in the NYS studies. Industry data here is from the EMSI database, which assigns all jobs within an industry to a NAICS code, does not analyze markets served by the job, and does not show indirect jobs. For example, this table allocates all restaurant employees to the restaurant industry and therefore the mixed visitor/resident category. The NYS studies estimate the number of jobs sustained by traveler activity, but do not provide a specific methodology for the estimation¹².

¹² The studies are created by Tourism Economics, an analysis and consulting firm. Tourism Economics states that "Our approach combines visitor survey and industry data to provide maximum credibility and to ensure no component of tourism activity is overlooked." <http://www.tourismeconomics.com/economic-impact/tourism-economic-impact> website visited 8/16/16

Tourism Occupations

Through the planning process, community members expressed concerns that occupations supporting tourism have a different wage scale (i.e. lower) from manufacturing and utility occupations. The table below presents the occupations within the 22 industries designated as tourism, along with wages and education requirements. Only occupations with 10 or more persons employed in Lewis County are shown. The full table, which presents 98 different occupations, is included as an attachment to this report.

Table 8: Occupations in Tourism Industries

Occupations in Tourism Industries Employing 10 or More Persons, Lewis County							
SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
35-3031	Waiters and Waitresses	115	\$8.70	\$15,216.40	No formal credential	None	Short-term
41-2011	Cashiers	101	\$8.90	\$15,569.52	No formal credential	None	Short-term
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	94	\$8.72	\$15,262.40	No formal credential	None	Short-term
35-3011	Bartenders	40	\$8.71	\$15,237.90	No formal credential	None	Short-term
35-2014	Cooks, Restaurant	34	\$9.76	\$17,086.96	No formal credential	< 5 yrs	Moderate-term
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	26	\$13.12	\$22,964.39	High school diploma or equivalent	< 5 yrs	None
35-9021	Dishwashers	24	\$8.62	\$15,086.75	No formal credential	None	Short-term
35-2021	Food Preparation Workers	24	\$9.23	\$16,150.85	No formal credential	None	Short-term
41-1011	First-Line Supervisors of Retail Sales Workers	24	\$15.74	\$27,548.51	High school diploma or equivalent	< 5 yrs	None
37-2012	Maids and Housekeeping Cleaners	21	\$8.84	\$15,470.24	No formal credential	None	Short-term
35-2011	Cooks, Fast Food	16	\$8.58	\$15,017.09	No formal credential	None	Short-term
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	14	\$8.54	\$14,953.13	No formal credential	None	Short-term
41-2031	Retail Salespersons	14	\$10.86	\$19,004.85	No formal credential	None	Short-term
37-3011	Landscaping and Groundskeeping Workers	13	\$10.96	\$19,171.73	No formal credential	None	Short-term
49-9071	Maintenance and Repair Workers, General	12	\$16.28	\$28,492.87	High school diploma or equivalent	None	Long-term
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	11	\$8.71	\$15,234.53	No formal credential	None	None
43-4081	Hotel, Motel, and Resort Desk Clerks	11	\$10.16	\$17,780.87	High school diploma or equivalent	None	Short-term
35-2015	Cooks, Short Order	10	\$10.13	\$17,724.51	No formal credential	None	Short-term
Subtotal of Employees		603					
Average of Median Hourly Earnings			\$10.25	\$17,942.97			

Source: EMSI

Average hourly earnings for this group is \$10.25. Employers are likely to provide short-term training and require no prior work experience. The annual wage of these occupations is calculated by multiplying the median hourly earnings by a 35-hour work week, for 50 weeks per year (allowing for unpaid time off.) Some of these jobs are likely to be part-time, seasonal, or both, so the annual wage numbers would not apply.

On 12/31/16, the minimum wage for Greater New York State (excluding NYC, Long Island, and Westchester) will rise to \$9.70/hr, then to \$10.40 by 12/31/17, and increasing toward \$15.00/hr after 2021¹³. Tipped workers, which includes many restaurant workers, have a lower minimum wage of \$7.50/hr with variations depending on tips. Rising NYS minimum wage requirements may affect several tourism and hospitality occupations, including cashiers, cooks and food preparers, dishwashers, maids and cleaners, dining room and cafeteria attendants, and hosts and hostesses. These workers currently earn less than \$9.70 per hour, and are less likely than waiters/waitresses and bartenders to receive tips.

Tourism occupations, like many other industries, pay more as educational requirements increase¹⁴. The table below ranks occupations from lowest to highest average hourly earnings. The number of occupations column refers to the number different categories, not the number of persons employed. For example, 39 occupations, of which Waiters and Waitresses is the most common in the county, require no formal credential. Another 40, which pay on average slightly more, require a high school diploma or equivalent, and the highest paying occupations require a bachelor's degree.

Table 9: Education and Earnings, Lewis County Tourism Occupations

Education and Earnings, Lewis County Tourism Occupations			
Typical Entry Level Education	Number of Occupations	Average Hourly Earnings	Example of Occupation
No formal credential	39	\$10.42	Waiters and Waitresses
Some college, no degree	2	\$13.50	Bookkeeping, Accounting, and Auditing Clerks
High school diploma or equivalent	40	\$14.75	Hotel, Motel, and Resort Desk Clerks
Postsecondary nondegree award	3	\$15.25	Automotive Service Technicians and Mechanics
Bachelor's degree	13	\$23.24	Sales Managers
Master's degree	1	\$22.66	Curators
Totals	98		

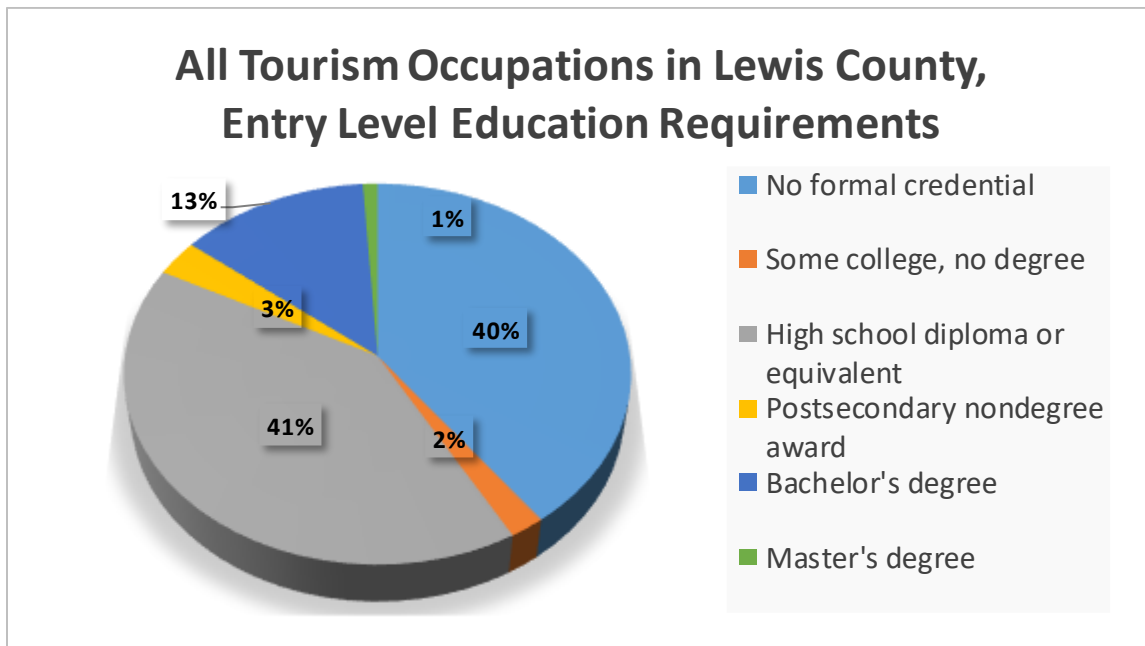
Source: EMSI data, calculations for this report

¹³ Source: www.labor.ny.gov/workerprotection/laborstandards/workprot/minwage.shtm. Accessed 9/6/16. Dept. of Labor does not provide a complete schedule for wage increases through the final \$15.00/hr target.

¹⁴ In Lewis County only one tourism position is categorized as requiring a Master's Degree, so is not representative of the general pay relationship between Masters' and Bachelors' degrees.

The pie chart below presents the same data in a form that highlights the modest educational requirements: 81% require a high school diploma or less.

Chart 1: All Tourism Occupations in Lewis County Entry Level Education Requirements



Tourism Jobs and Development Strategy

Tourism jobs in Lewis County conform to widely held (and accurate) perceptions that they are relatively low paying, and have few requirements. Lyons Falls is exploring increasing tourism as part of an overall development approach that is also intended to attract industries with higher wage levels, such as paper manufacturing. Tourism jobs play a role in this strategy:

- Tourism jobs are often entry level jobs and can be suitable for people who are still earning educational awards or acquiring skills;
- Like other occupations that accept and train entry-level workers into higher-wage positions, tourism related jobs can present a career path within the businesses and transferrable skills;
- Summer jobs can inspire entrepreneurship and instill a valuable work ethic;¹⁵
- The presence of thriving businesses that serve tourists and residents contribute to overall quality of life, helping to attract other employers and new residents.

¹⁵ (Business News Daily Staff, 2012)

Part 3 –Tourism Market Segmentation and Visitor Profiles

The Blueway Report¹⁶ and the Lewis County tourism study both analyze tourists by type of activity chiefly sought, and include typical income and spending characteristics. For example, Heritage and Culture tourists are described as older, affluent, willing to stay longer and spend more, and interested in museums, performing arts, and mild outdoor activities such as scenic views and golf. ATV users are described as younger, single, male, less affluent, and also interested in other outdoor activities such as fishing and camping. The essential question was “Who participates in these activities?” with a follow up question also examined: “What else do they like to do?”

This grouping highlights which segments are open to the widest variety of activities; families with children, known as “Knowledge Seekers,” are expected to seek museums, festivals, and fairs, but they are also likely to camp. Families who camp are likely to hike, canoe, and kayak.

This section of the report begins with the four tourist segments identified in the Blueway and Lewis County reports, condenses their twelve demographic sub-groups into four primary groups, and uses these four groups to identify a broader range of activities that appeal to each group.

Tourist Market Segments

The Blueway Report identifies four types of tourists: Heritage and Culture, Knowledge Seekers, and Recreation Enthusiasts divided into Outdoor Activity User – Non-Motorized, and Outdoor Activity User – Motorized. Each of these is described below.

Heritage and Culture

“Heritage and Culture tourists tend to be affluent, to stay an average of 1.2 days longer, and spend more when they travel.”¹⁷ These visitors are attracted by museums and art galleries, performing arts, historic sites and landmarks, and cultural festivals. These visitors are older (average age 60 years old), often retired, and outdoor experiences are mild rather than strenuous, such as scenic walks, visiting gardens, and golf. They are more likely than most tourists to travel during the “shoulder” seasons of spring and fall. Intrinsic assets they would visit in Lyons Falls would be the Forest Presbyterian Church, the Small Building, and Black River Canal markers. Community created assets such as the Lyons Falls History Association and the Pharmacy Museum are listed by the Lewis County tourism booklet as culture and heritage attractions.¹⁸

This tourism segment likes to shop and dine, enjoys bed and breakfast accommodations and spas, and guided tours such as wineries. The Blueway Report states that “culture seekers” are 8.4% of the U.S. general population. However, according to the National Assembly of State Arts Agencies, many more travelers are heavily influenced by these attractions: thirty percent of adults said that an arts, cultural, or heritage activity influenced their choice of travel, and many will extend a stay if these attractions are available.¹⁹ The Lewis County Tourism Report²⁰ specifically recommends inventorying county historical sites and promoting them to show the breadth of local offerings for this tourist segment.

¹⁶ (White - Still - & Wild, A Blueway Trail Development Plan for the Black River in Oneida, Lewis and Jefferson Counties New York State, 2007)

¹⁷ Ibid

¹⁸ (Adirondacks Tug Hill Region - Lewis County NY Visitor's Guide, 2016, p. 29)

¹⁹ (National Assembly of State Arts Agencies, 2016)

In the Tourist Activity Crossover Matrix, below, Heritage and Culture visitors are grouped as Retired Couples, Higher Incomes. This group also corresponds closely to a second homeowner demographic, making them an important group to reach with both tourism promotion and “Living in Lyons Falls” tactics suggested by Allieway’s Marketing Plan.

Knowledge Seekers

Knowledge Seekers, which the Blueway Report says comprise 9% of the U.S. population, look for many of the same activities as Heritage and Culture travelers but are likely to be younger, to have families and jobs, and to be slightly less affluent. The average age is 47 years. They also seek museums and historic sites for learning experiences but are more interested in zoos and aquariums and less in performing arts. They will stay in campgrounds, do not focus as much on shopping and dining, and travel during the summer months when schools are not in session.

Knowledge Seekers are described as having slightly to substantially higher household income than average, but are not entirely comparable to Heritage and Culture tourists in the same income categories because they are families.

In the Tourist Activity Crossover Matrix, Knowledge Seekers are grouped as All Families. These visitors are highly likely to access information online and to appreciate a range of activities to keep all family members engaged, making them a target for promotional tactics such as Allieway’s “30 Exciting Things.”

Recreation Enthusiasts

The Blueway Report identifies outdoor recreation visitors by non-motorized and motorized enthusiasts. Recreation Enthusiasts are “visitors in motion” who view the trip itself, by water, snow, or trail, to be the activity. Encouraging them to make stops at attractions and amenities, and to plan routes around a constellation of offerings, can increase their engagement and spending in the community. Expanding hosted events, as suggested in Allieway’s Marketing Strategy, can also draw them into the village.

Heritage and Culture and Knowledge Seeker groups, as described by the Blueway Report, participate in outdoor recreation activities. Recreation Enthusiasts are therefore spread across all of the four demographic groups within the Tourist Activity Crossover Matrix, according to average age, income, and family status, with some of the outdoor recreation activities, notably Scenic and Wildlife Views and Backpacking and Hiking, appealing to multiple groups.

Motorized Recreation Enthusiasts include ATV and snowmobile riders, whom the Blueway Report says make multiple and often long trips to the Tug Hill region. They typically range in age between 35 and 54 years.

The Lyons Falls BOA Steering Committee noted the importance of motorized recreation to second homeowners in the area but the Blueway Report does not address participation in these sports by owners of second or seasonal homes; it does state that as of 2000 they represented 21% of housing in the Black River region.

Snowmobile riders, according to the Blueway Report, have higher than average incomes and more formal education, and are chiefly interested in other winter sports including downhill and cross-country skiing and snowshoeing. ATV riders are credited with a broader range of crossover activities including hunting and fishing, camping, hiking, mountain biking, and snowmobiling. They earn slightly below median

²⁰ (2011 Strategic Tourism Report, Prepared for the Lewis County Legislature, 2011, p. 35)

income but are largely single males so discretionary spending ability is not directly comparable to a family in the same income group.

Non-Motorized Recreation Enthusiasts engage in a range of strenuous and less-strenuous activities, from hiking and biking and canoeing to mountain biking and whitewater rafting. Families are believed to be more inclined to participate in non-motorized activities, generally speaking, but the Lewis County Tourism Report describes ATV riding with families who “tend to ride during the day then go places to eat, relax and sightsee in the evening.”²¹

Tourist Activity Crossover

Tourist Activity Crossover Matrix

The table below, “Tourism Activity Crossover Matrix,” reassembles market segmentation information presented in the Blueway Report and Lewis County Tourism Report in order to identify activities that attract the greatest variety of visitors. Highlights from the table include:

Many activities appeal to multiple types of visitor, and with its scenic views and snowmobile and river access. With assets like its boat launches and maintained snowmobile trails, Lyons Falls already has these activities.

- Mild outdoor recreation activities such as scenic and wildlife viewing and backpacking and biking have the greatest appeal, with all four demographic groups participating.
- Visiting museums, art galleries, historic sites, and landmarks draws three groups.
- Twelve activities draw at least two groups, including camping, canoeing and kayaking, cross country skiing, fishing, ATV riding, snowmobiling, bicycling (on roads), hunting, and spas and relaxation.

The demographic group with the broadest range of activities (18) is All Families.

- They are willing to shift between culture and heritage-based activities and outdoor recreation, making them a highly flexible group.
- They could be initially attracted by a single asset but welcome reasons to stay, enjoy, and spend.

Heritage and Culture and Singles are more focused.

- Where they have the inclination and willingness to spend (Spas and relaxation and snowmobiling also correlate to higher incomes) their economic impact may be above average.
- Second homeowners fit the demographic of Heritage and Culture visitors and if they find reasons to stay longer and visit more frequently they will increase spending.
- They are more likely than families to visit during the “shoulder” seasons of spring and fall, rounding out the year and providing an audience for indoor activities.

²¹ (2011 Strategic Tourism Report, Prepared for the Lewis County Legislature, 2011, p. 24)

Table 10: Tourist Activity Crossover Matrix

Tourist Activity Crossover Matrix					
Blueway Segment	Culture and Heritage	Knowledge Seekers and Families	Outdoor Recreation, Non Motorized	Outdoor Recreation, Motorized	
Demographic	Retired Couples, Higher Incomes	All Families	Couples, All Incomes, Travelling without	Singles	Number of Groups Attracted
<u>Group 1 - Activities That Cross Income Groups</u>					
Scenic & Wildlife Views	1	1	1	1	4
Backpacking & Hiking	1	1	1	1	4
Museums & Art Galleries	1	1	1		3
Historic Sites, Communities, & Landmarks	1	1	1		3
Architecture & Archeology	1		1		2
Cultural Festivals & Fairs	1		1		2
Theatres & Performing Arts	1		1		2
Camping		1	1		2
Canoeing/Kayaking		1	1		2
Cross Country Skiing		1	1		2
Fishing		1		1	2
ATV Riding		1		1	2
Snowmobile Riding		1		1	2
Road Biking		1	1		2
Hunting		1		1	2
Spas & Relaxation	1		1		2
Community & Family Festivals & Fairs and Agri-tourism (note)	1	1			2
Swimming		1			1
<u>Group 2 - Activities Associated with Higher Incomes or Dedicated Spending</u>					
Golfing	1	1	1		3
Mountain Biking		1	1	1	3
Whitewater Rafting (note)		1	1	1	3
Horse Trails (note)		1	1		2
Totals for each group	10	18	16	8	

This table separates four activities from the rest, based on their expense or resource requirements. Golf will attract many demographics but largely those with higher incomes. Mountain biking and whitewater rafting are associated with both singles and higher incomes, and require specialized equipment. Horse

trails may have a broader appeal but visitor access to horses is not well established in Lewis County, and bringing in and housing horses from other areas may be both difficult and expensive.

Note on Festivals and Fairs: The Lyons Falls Festival each July is an example of a Community and Family Festival; it “celebrates the community and was created especially for the children.”²² Families may plan a trip’s destination or timing in order to attend this festival. Cultural Festivals and Fairs would be events such as the Constable Hall Arts and Antique Auto Show, which may also attract a wide variety of visitors but would appeal most strongly to visitors seeking the cultural and heritage experience – retired couples and couples with higher incomes. Both festivals would contribute to a sense of energy and excitement, but this analysis focuses on the primary audience based on the theme and activities of an event. Events designed to have a very broad appeal, such as Maple Weekends and the Lewis County Fair, are noted.

Tourist Activity Crossover and Visitor Center

Lyons Falls stakeholders have demonstrated a strong understanding of the importance of outdoor recreation to local tourism. This analysis shows that for most groups focused on such activities, different types of outdoor recreation have a strong appeal, and culture and heritage assets are also very attractive.

Informing visitors of additional activities is therefore an important goal. Both the Lewis County Tourism and Blueway Reports cite the importance of cross-selling activities. The Blueway Report specifically suggested Lyons Falls for a kiosk-style visitor center. A kiosk is currently set up in Lowville.

This report does not recommend building a physical visitor center in Lyons Falls, for the following reasons:

- Visitors increasingly rely on online and mobile phone technology for information.
- A staffed center would have high ongoing costs for salaries.
- A standalone kiosk is not itself a destination that would attract visitors not already in the village. Costs would include construction, maintenance, and restocking.
- Paper brochures and maps rely on other organizations’ and businesses’ willingness to allocate funds for printing and distribution, and can become outdated very quickly.

A virtual, portable, anywhere and everywhere visitor’s center is recommended instead of a physical location. Methods of distributing information should focus on identifying visitors wherever they may be, and reaching them in order to direct their next activity toward offerings in Lyons Falls.

- Online and mobile phone technology should be investigated for its ability to deliver up-to-date information directly to visitors, particularly information formatted to be usable on the smaller screens of tablet computers and smartphones.
- Posters or paper brochures could be placed in visible locations, providing internet addresses and Quick Response (QR) codes that bring users directly to colorful, searchable, current, and interconnected itineraries and information.
- Use of existing web-based “wayfinding” should be maximized. Many visitors already rely on national search engines, mapping, and trip planning sites that are constantly evolving and developing tools to let users design personalized trips. Two examples, with images, are below.²³

TripAdvisor finds a variety of amenities very quickly. It uses Google mapping and adds interactive features including reservations, reviews, and personalization of itineraries.


²² (Adirondacks Tug Hill Region - Lewis County NY Visitor's Guide, 2016, p. 26)







²³ All images from 9/9/16

[www.tripadvisor.com/Tourism-g48091-Lyons Falls New York-Vacations.html](http://www.tripadvisor.com/Tourism-g48091-Lyons_Falls_New_York-Vacations.html)

Lyons Falls, New York

326 reviews and opinions

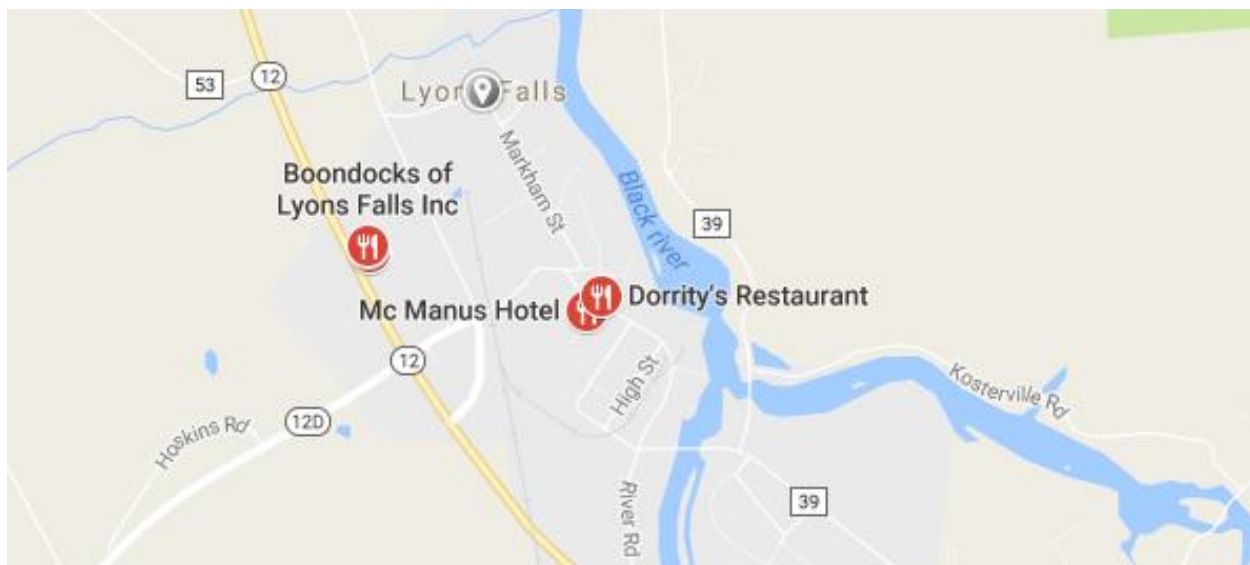


-  **Lodging (1)**
222 Reviews
-  **Vacation Rentals (28)**
-  **Flights**
-  **Things to Do (1)**
6 Reviews
-  **Restaurants (4)**
98 Reviews
-  **Forum**

Overview | Places to Stay | Location | Things to Do

Google Maps is another go-to resource for information, and businesses can literally put themselves “on the map” so they can be found. The Edge pops right up with the default settings. The screen snip below was created by asking Google to add restaurants to its basic features.

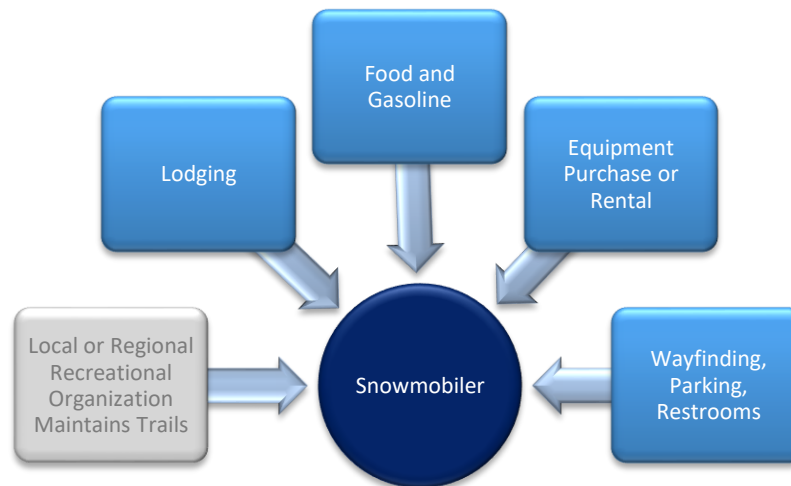
<https://www.google.com/maps/place/Lyons+Falls>



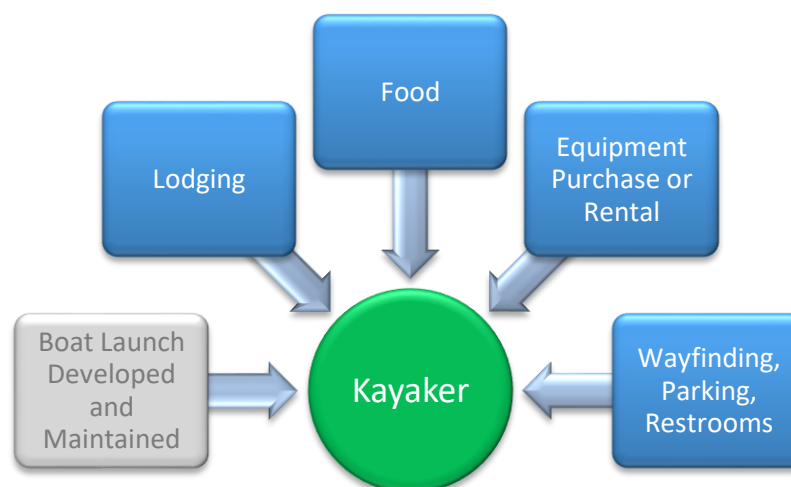
Part 4 – Tourism Building Blocks

This section of the report describes assets that attract or support tourism, and discusses how they act as building blocks. It deliberately defines assets very broadly and therefore includes some amenities that largely or even primarily serve residents, but can nevertheless contribute to a visitor's choice of location and activity. The purpose is to develop a framework for understanding the assets already in and around Lyons Falls and how they are, and can be, used. That understanding can underpin the process of identifying and prioritizing opportunities to develop amenities that will increase visits and spending.

The illustration below shows some of the building blocks that support a snowmobiler:



The next illustration shows the same building blocks supporting a kayaker. Snowmobilers and kayakers were chosen because they can appear to be near opposites – winter/summer, motor/non-motor, indoor lodging/camping, land/water – yet they both need lodging, food, equipment, wayfinding, parking, and travelways.



Lyons Falls and the area surrounding the village have many building blocks for tourism, and the Steering Committee has expressed a need for more, particularly restaurants and hotels²⁴, which fit neatly into the definition of a tourism asset. The Committee also observed the need for better signage and wayfinding, and a stronger online presence – another form of wayfinding – and these are also defined tourism assets for this study.

Tourism Building Blocks – Tangible and Intangible Assets

Historic sites, campgrounds, cultural festivals, and lodging are examples of assets that are straightforward to identify with tourism. With the exception of the festivals, these assets are also physical -- natural or built, visible and touchable. Similarly visible and touchable are quality of life amenities that may primarily serve residents but also support visitors – gas stations, pharmacies and groceries, parking, or available real estate.

Investing in these tangible amenities benefits current residents; more purchasing and leisure choices, shorter drive times for daily retail needs, better space for existing businesses to expand, and new or renovated housing. It is an attraction for new businesses and residents as well. An increase of \$75,000 in sales for the commercial and institutional building construction industry in Lewis County generates a new construction job with an estimated \$31,354 in new earnings.²⁵

Communities such as Lyons Falls have a second set of assets – the organizations that support the community in ways that also improve the experience of visitors, regardless of whether attracting visitors is part of their stated mission. These intangible assets include civic, business, and youth organizations as well as recreational clubs, development agencies, and chambers of commerce. These groups make investments of time, enthusiasm, and money.

Tourism Building Blocks One - Tangible Tourism Assets

Tangible assets can be natural or created, specifically for visitors or appealing to visitors while serving primarily residents. For this analysis, five types of assets have been identified, distinguished from activities. In the snowmobiling example, the visitor engages in an *activity* but uses trails, which are *recreational assets*, stays in a *lodging asset*, purchases meals at a restaurant or *entertainment asset*, buys new gloves at a *retail asset*, and needs gasoline, coffee, snacks, and parking, which are *general assets*. General assets support many types of resident, business, and visitor activities and may include grocery, pharmacy, public restrooms, and real estate. A nearly identical set of assets supports the local snowmobiler, the seasonal resident snowmobiler, or the kayaker.

Envisioning assets as building blocks detaches them from specific activities and makes it possible to see how each may support a wide variety of activities and other assets. It can show that assets sometimes taken for granted, like public parking, have an important role in the visitor experience.

The following table, Tourism Building Blocks One – Tangible Assets, lists types of assets that support tourism in Lewis County, and assigns them to two categories: “Primarily Visitor” for those that serve mostly at tourists, or “Visitor and Resident,” indicating they serve both visitors and residents. This list is not comprehensive and may overlook a type of asset, but was developed to demonstrate the breadth of assets and their potential role in tourism. List development began with an overview of the types businesses and resources available in Lyons Falls, then expanded to include activities that might use those

²⁴ Steering Committee Meeting 7/26/16

²⁵ Source: EMSI Impact Scenario, Commercial and Institutional Building construction in Lewis County, NY.

businesses and resources, and finally added additional assets that would be likely to appeal to visitors engaging in those activities.

This table therefore presents tangible assets that are expected to appeal to tourists who visit Lyons Falls, as well as residents, even though equipment rental or purchase, grocery store, campground, spa/relaxation, and performing arts venues are not currently available directly in the village.

Table 11: Tourism Building Blocks One – Tangible Assets

Tourism Building Blocks One - Tangible Assets			
Asset	Type	Primarily Visitor	Visitor and Resident
Boat launch	Recreation	1	
Equipment rental, ATV or snowmobile	Recreation	1	
Equipment rental, canoe or kayak	Recreation	1	
Equipment rental, XC skiing	Recreation	1	
Hiking trail	Recreation	1	
Museum or Historic Site, interior can be visited	Recreation	1	
Historic markers or buildings, exterior only	Recreation	1	
Recreational water (river, lake) access, non boat launch	Recreation	1	
Wayfinding	Recreation	1	
ATV trail	Recreation		1
Community park	Recreation		1
Horseback Riding stable	Recreation		1
Horseback Riding trail	Recreation		1
Playground	Recreation		1
Scenic/nature park	Recreation		1
Scenic/nature trail	Recreation		1
Snowmobile trail	Recreation		1
Equipment purchase, fishing	Retail		1
Equipment purchase, ATV or snowmobile	Retail		1
Equipment purchase, canoe or kayak	Retail		1
Equipment purchase, XC skiing	Retail		1
Bed & Breakfast	Lodging	1	
Campground	Lodging	1	
Hotel or Inn	Lodging	1	
Motor lodge	Lodging	1	
Resort or Activity-based Lodging	Lodging	1	
Spa or relaxation venue	General		1
Commercial real estate availability	General		1
Convenience store	General		1
Gas station and repair service	General		1
General goods store	General		1
Grocery store	General		1
Pharmacy	General		1
Public parking	General		1
Residential real estate availability	General		1
Drinking establishment	Entertainment		1
Full service restaurant	Entertainment		1
Limited service restaurant	Entertainment		1
Movie theatre	Entertainment		1
Performing arts venue (public or private)	Entertainment		1
Totals by Audience		14	26

Tourism Building Blocks Two - Intangible Tourism Assets

Intangible tourism assets attract visitors or contribute to their experience and are not as visible as a bed and breakfast or scenic overlook.

Organizations

Organizations at the village, regional, and state level promote or support visitor activity. Sometimes they are directly responsible for tangible building blocks, such as trail maintenance or museum development and support, while others sponsor events, or by sustaining and promoting community life create an environment appealing to visitors and new business owners. Examples of the many organizations in the village and region include:

Local Civic. Lyons Falls ALIVE describes its mission “to nurture and promote commercial, recreational, and community activities that embrace the quality of life for our village and surrounding area while preserving and developing our historical environment.” They touch visitors in multiple ways, including actively sponsoring events such as the Black-Moose Kayak Fest, volunteering for streetscape projects, and posting monthly calendars of events.

Local Historic. The Lyons Falls History Association created a museum – a tangible asset - and collects pictures and materials about the village’s history. It actively engages in tourism by organizing trips to other local historic sites.

Regional Development. The Tug Hill Commission, the Development Authority of the North Country, and Drum Country Business engage in activities that sustain and promote communities. These efforts support the region’s attractiveness to visitors. More directly, the Blueway Report was produced in cooperation with the Tug Hill Commission, and Drum Country Business, while making the case for regional quality of life, declares “If you enjoy extreme kayaking... you won’t be disappointed by the Black River.”²⁶

Regional Business. The Lewis County Chamber of Commerce works directly and indirectly to promote tourism and tourism businesses. It administers funding for business, economic development, and tourism purposes, and publishes an online and printed full-color visitor’s guide.

Arts Organizations. The Arts Community of Lewis County sponsors shows and events including its “REEL Alternative” program at one of Lyons Falls’ entertainment assets, the Valley Brook Drive In.

Regional Recreation. Motorized outdoor recreation inspires many of these groups, which include snowmobile and ATV clubs that maintain trails which together form a regional system that enhances the visitor experience as well as local residents’ enjoyment. Missing Link Snowmobilers and Tug Hill Wheelers are examples of organizations whose activities promote off-highway recreational vehicle activities.

Regional Historic. The Lewis County Historical Society acquires and maintains cultural and heritage recreational assets, and supports activities like the “Drive it Yourself” tour of Lyons Falls and a History and Genealogy Fair, and a concert series with a wide variety of performers.

Regional Agricultural. The Cornell Cooperative Extension of Lewis County seeks to sustain a wide variety of community needs with information and assistance, and has a strong agricultural focus that directly supports regional farms and agribusiness, and therefore agri-tourism.

Youth. The 4-H Club of Lewis County encourages young persons’ involvement with agriculture, including performing a major role in the Lewis County Fair.

²⁶ (Drum Country Business, 2016) accessed 8/19/16

Wayfinding

Wayfinding assets may be tangible, such as a road sign advising drivers on Route 12 that stopping in Lyons Falls yields a beautiful view and a good lunch. Also tangible to different degrees are paper and online maps or guides that market assets to visitors. Increasingly visitors carry cell phones that use mobile apps and geographic information system platforms. Through the efforts of local and regional organizations, and businesses that advertise, the region and some Lyons Falls assets (e.g. restaurants, boat launches) can readily be found by potential visitors.

Wayfinding in this report is included with intangible assets because it encompasses not just the presence of signs or maps, but a thoughtful, community-specific approach to guide and advise visitors, to keep them oriented within the community's streets and buildings, or to connect them with a site or amenity beyond what drew them, and answer the question "what should we do next?"

Tourism Building Blocks – Activities

Tourism activities are the third and final building blocks for the visitor experience. The visitor experience is the capstone, supported by activities and assets that attract, provide enjoyment, and encourage longer stays and more spending. The visitor experience pyramid below shows this graphically:



The following table, Tourism Building Blocks Three – Activities, lists recreational and leisure activities that are already available in Lyons Falls, or have been discussed during this BOA process as opportunities for development. Of the 22 activities selected, 17 are outdoor, with varying requirements for fitness or equipment.

These activities are leisure and recreation choices for at least one of the group discussed in Part 3 - Tourist Segmentation, and have qualities that can draw visitors specifically to the village and region. Visitors who decide on an ATV weekend, for example, may choose location and length of stay based on the range of additional assets available such as restaurants, movie theatres, or other activities, especially for a larger or family group.

Table 12: Tourism Building Blocks Three - Activities

Tourism Building Blocks Three - Activities		
Type	Indoor/Outdoor	Available in Village
Scenic & Wildlife Views	Outdoor	Yes
Backpacking & Hiking	Outdoor	Scenic, Fitness
Community & Family Festivals & Fairs	Outdoor	Yes
Cultural Festivals & Fairs	Outdoor	Yes
Camping	Outdoor	No
Canoeing/Kayaking	Outdoor	Yes
Cross Country Skiing	Outdoor	Yes
Fishing	Outdoor	Yes
ATV Riding	Outdoor	Yes
Snowmobile Riding	Outdoor	Yes
Road Biking	Outdoor	Yes
Hunting	Outdoor	Per DEC regulations*
Swimming	Outdoor	Yes
Golfing	Outdoor	No
Mountain Biking	Outdoor	No
Whitewater Rafting	Outdoor	No
Horseback Riding	Outdoor	Yes
Agricultural and Agribusiness	Outdoor and Indoor	Yes
Museums & Art Galleries	Indoor	Yes
Historic Sites, Communities, & Landmarks	Indoor	Yes
Movies, Theatres & Performing Arts	Indoor	Yes
Spas & Relaxation	Indoor	No

* Dept. of Environmental Conservation regulates hunting seasons and the land areas, public and private, that can be safely used for hunting.

With tourism assets – tangible, intangible, and activities – understood within this framework, Part 5 will provide a snapshot inventory of many of the tangible building blocks already in place, and identify gaps that may become opportunities for future development.

Part 5 – Tourism Asset Inventory

According to this analysis, Lyons Falls has 15 unique tourism assets²⁷, 13% of 112 counted for the Lewis County Tourism Asset Inventory. Assets for this count include recreation, access to activities such as snowmobiling or boating, ability to rent recreational equipment, and lodging. By contrast, village residents comprise only about 2% of county residents. Restaurants and drinking establishments are not included in these statistics because of their strong appeal to local residents. They are listed in the asset inventory as examples of regional offerings if they are a) located in Lyons Falls or b) associated with either lodging or recreation, such as Dorrity's Restaurant, Tug Hill Vineyards or Snow Ridge in Turin.

Tourism assets in Lewis County strongly reflect the character of the region, not just its rural and scenic assets, but qualities that come from that environment: innovation, creativity, persistence.

Tourism assets are therefore described in two sections. First, the unique assets of Lyons Falls and how they fit within the visitor demographics, and then the characteristics of assets throughout the county.

Attachment A is a foldout inventory of these Lewis County assets.

Lyons Falls Tourism Assets and Visitor Crossover

Tangible assets in Lyons Falls are strongly oriented toward outdoor recreation. The village offers access to outdoor activities, activity-oriented lodging, and agri-tourism, defined as the farmer's market and ease of participation in the Maple Weekend, based on 19 maple producers within 20 miles of the village. By comparison, the Village of Croghan, similar in size with approximately 618 residents, has a cluster of small specialty shops (shops are not counted in the tourism asset inventory) and bed and breakfast options.

Intangible assets are also focused on outdoor recreation, with the Black/Moose River Kayak Fest and the Lyons Falls Festival.

The visitor experience pyramid for Lyons Falls shows how outdoor-oriented tourism assets support outdoor activities for a visitor experience that appeals to Recreation Enthusiasts. Other types of visitors can "cross over" to explore these experiences.



²⁷ Plus four supporting amenities: pharmacy, gas station/convenience store, and two hardware/general goods stores for incidentals that visitors may unexpectedly need. These were not counted for the entire county and are not included in the statistical comparison.

The Steering Committee’s focus on outdoor tourism is well supported by the current asset mix of access to recreation, promotion and celebration through festivals, and businesses. Investment in outdoor recreation will strengthen this cluster.

The Steering Committee and stakeholders have also expressed the desire to have a more diverse mix of tourism assets, including small shops such as are found in the Village of Croghan, and amenities like a spa, currently available chiefly in Lowville. Investments like these expand the base of the pyramid and support another set of activities.

The “Tourist Activity Crossover Matrix” from Part 3, above, has been updated specifically for Lyons Falls to create the table below. All of the activities in the original matrix appeal to one or more of the groups of outdoor enthusiasts who are already visiting Lyons Falls. “Indoor” activities such as museums and historic sites that may chiefly draw Heritage and Culture or family visitors attract outdoor recreation visitors as well, and they will “cross over” some of their time and resources if the activity is available.

Second homeowners should particularly be targeted as crossover visitors.

Table 13, below, highlights activities where the village:

- Has a unique asset or assets - scenic views, canoe/kayak.
- Has no assets in that category, but it is an activity that appeals to at least two groups of existing visitors - camping, spa.
- Connects to an activity where crossover assets and amenities can bring visitors into the community as part of another form of recreation and leisure – snowmobiling, ATV, road biking, canoe/kayak.

Table 13: Tourist Activity Crossover Matrix – Lyons Falls Assets

Tourist Activity Crossover Matrix - Lyons Falls Assets						
Activity Supported by Assets	Retired Couples, Higher	All Families	Couples, All Incomes, Travelling without Children	Singles	Number of Groups Attracted	Number of Assets in Lyons Falls
<u>Group 1 - Activities That Cross Income Groups</u>						
Scenic & Wildlife Views	1	1	1	1	4	2
Backpacking & Hiking	1	1	1	1	4	1
Museums & Art Galleries	1	1	1		3	1
Historic Sites, Communities, & Landmarks	1	1	1		3	3
Architecture & Archeology	1		1		2	See Historic Sites
Cultural Festivals & Fairs	1		1		2	0
Theatres & Performing Arts	1		1		2	0
Camping		1	1		2	0
Canoeing/Kayaking		1	1		2	4
Cross Country Skiing		1	1		2	1
Fishing		1		1	2	1
ATV Riding		1		1	2	1
Snowmobile Riding		1		1	2	1
Road Biking		1	1		2	1
Hunting		1		1	2	Per DEC regs
Spas & Relaxation	1		1		2	0
Community & Family Festivals & Fairs and Agri-tourism		1			1	4
Swimming		1			1	1
<u>Group 2 - Activities Associated with Higher Incomes or Dedicated Spending</u>						
Golfing	1	1	1		3	0
Mountain Biking		1	1	1	3	0
Whitewater Rafting		1	1	1	3	0
Horse Trails		1	1		2	1
Totals for each group	9	18	16	8		23

Tourism Assets in Lewis County

About the Research Method

This asset inventory was developed using procedures from a research method known as “snowball sampling.” In this method, a starting point such as a stakeholder interview or document review ends by asking the source “where should I look next?” The next set of sources returns both more information and more sources, all within a related community or context. This method was chosen in part because much of the research was conducted online and links among websites lead to new sources. It was also chosen because it mirrors how many tourists acquire information about activities and regions – starting with one goal but often happily discovering additional and alternative activities. Part of the research therefore provided insight into how visitors to the region find – or do not find – information about its attractions.

The snowball sampling method had two starting points. The first was the Blueway Report, which provided lists and descriptions of many assets such as the boat launches, along with links to sites for the Department of Environmental Conservation (DEC) and regional organizations, and insight into some goals for tourism in the region. The second was the Lewis County Chamber of Commerce website²⁸ which provided local business information and a direct link to the county visitor’s guide²⁹, which was accessed online and by hardcopy. Assets and activities from this were investigated online, often leading to yet more assets, activities, or insight, as the “snowball” of data grew.

Snowball sampling is not random sampling, but it can reveal characteristics of the data not readily seen with other methods, chiefly that the data being searched – in this case tourism assets – are not always well catalogued or easy to find. It was well-suited to Lewis County, where tourism marketing efforts present many assets and activities thoroughly and beautifully, but where other assets are small, difficult to categorize, or new and therefore not included in comprehensive sources but found by their connections to other assets.

Not all tourism assets in the county are included in the inventory, because the broad definition of assets within this report would have required the inclusion of amenities that serve chiefly visitors but some residents, then chiefly residents and some visitors, in communities where the relationship between visitor amenities and local resident quality of life is not as pronounced as it is for Lyons Falls – this particularly applies to larger communities. Small shops, restaurants and bars, convenience stores, grocery and goods store, and gas stations were therefore excluded from the countywide analysis, but included in the study of Lyons Falls itself.

About Lewis County Tourism Assets

The following themes became apparent as tourism assets were identified and catalogued, and have informed the recommendations in the Executive Summary at the beginning of this report:

- Activities are *unique to the region*, e.g. whitewater rafting, and built assets such as cabins and campgrounds often take advantage of regional strengths rather than importing an external model.
- Activities throughout the county, as in Lyons Falls, are heavily outdoor oriented. Winter tourism is a strength, but the “shoulder seasons” of spring and fall, which typically see fewer visitors because

²⁸ <http://www.lewiscountychamber.org/> accessed repeatedly July – September 2016

²⁹ (Adirondacks Tug Hill Region - Lewis County NY Visitor's Guide, 2016)

families are fewer, are particularly challenging in the region because of the lack of indoor activities.

- County residents are *innovative* in attracting and serving visitors. The tangible assets are multifaceted - historic sites hold concerts, and inns may rent snowmobiles.
- Outdoor activities can be *strenuous*, for many visitors enjoyable for part of a day but, especially for families, ideally supplemented by crossover activities.
- Recreation opportunities are often *trail-oriented* – for example snowmobilers travel for enjoyment and seek food and activities accessible by sled. Kayakers spread word of restaurants located on the water.
- Recreation opportunities are *many, small, and scattered throughout the county*. Where the attractions themselves take less time, such as visiting a small historic site, visitors will likely seek additional activities that are both nearby and easy to find and may have difficulty doing so, not just because of travel distance but also lack of information or promotion.
- Lewis County visitors are in motion. They move from place to place either because the attractions are scattered or because the journey is itself the attraction:
 - Snowmobiling or ATV riding to dinner.
 - Canoeing from a campsite.
 - Hiking or boating for half a day, looking for crossover activities.
 - Fall foliage and Maple Weekend driving tours.

These major findings guide our recommendations for actions that the Village of Lyons Falls can take to enhance the visitor experience and increase tourism spending. In the graphic below, each finding is followed by an arrow summarizing suggested actions.



Attachment A – Lewis County Tourism Asset Inventory

Enclosed as large-format table on separate sheet.

Attachment B – Occupations in Tourism Industries, Lewis County

Occupations in Tourism Industries, Lewis County							
SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
35-3031	Waiters and Waitresses	115	\$8.70	\$15,216.40	No formal credential	None	Short-term
41-2011	Cashiers	101	\$8.90	\$15,569.52	No formal credential	None	Short-term
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	94	\$8.72	\$15,262.40	No formal credential	None	Short-term
35-3011	Bartenders	40	\$8.71	\$15,237.90	No formal credential	None	Short-term
35-2014	Cooks, Restaurant	34	\$9.76	\$17,086.96	No formal credential	< 5 yrs	Moderate-term
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	26	\$13.12	\$22,964.39	High school diploma	< 5 yrs	None
35-9021	Dishwashers	24	\$8.62	\$15,086.75	No formal credential	None	Short-term
35-2021	Food Preparation Workers	24	\$9.23	\$16,150.85	No formal credential	None	Short-term
41-1011	First-Line Supervisors of Retail Sales Workers	24	\$15.74	\$27,548.51	High school diploma	< 5 yrs	None
37-2012	Maids and Housekeeping Cleaners	21	\$8.84	\$15,470.24	No formal credential	None	Short-term
35-2011	Cooks, Fast Food	16	\$8.58	\$15,017.09	No formal credential	None	Short-term
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	14	\$8.54	\$14,953.13	No formal credential	None	Short-term
41-2031	Retail Salespersons	14	\$10.86	\$19,004.85	No formal credential	None	Short-term
37-3011	Landscaping and Groundskeeping Workers	13	\$10.96	\$19,171.73	No formal credential	None	Short-term
49-9071	Maintenance and Repair Workers, General	12	\$16.28	\$28,492.87	High school diploma	None	Long-term
35-9031	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	11	\$8.71	\$15,234.53	No formal credential	None	None
43-4081	Hotel, Motel, and Resort Desk Clerks	11	\$10.16	\$17,780.87	High school diploma	None	Short-term
35-2015	Cooks, Short Order	10	\$10.13	\$17,724.51	No formal credential	None	Short-term
43-3031	Bookkeeping, Accounting, and Auditing Clerks	6	\$15.19	\$26,580.64	Some college, no de	None	Moderate-term
27-2011	Actors	6	\$11.80	\$20,652.23	Some college, no de	None	Long-term

Occupations in Tourism Industries, Lewis County							
SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
53-3032	Heavy and Tractor-Trailer Truck Drivers	6	\$17.27	\$30,216.22	Postsecondary nond	None	Short-term
49-3023	Automotive Service Technicians and Mechanics	6	\$15.10	\$26,433.63	Postsecondary nond	None	Short-term
31-9011	Massage Therapists	6	\$13.37	\$23,391.45	Postsecondary nond	None	None
27-2021	Athletes and Sports Competitors	6	\$21.88	\$38,290.11	No formal credential	None	Long-term
27-2042	Musicians and Singers	6	\$16.01	\$28,024.93	No formal credential	None	Long-term
51-3021	Butchers and Meat Cutters	6	\$15.23	\$26,654.89	No formal credential	None	Long-term
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6	\$14.90	\$26,079.97	No formal credential	None	Short-term
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	6	\$13.52	\$23,657.02	No formal credential	None	Short-term
37-3019	Grounds Maintenance Workers, All Other	6	\$11.93	\$20,874.27	No formal credential	None	Short-term
27-2031	Dancers	6	\$11.91	\$20,845.01	No formal credential	None	Long-term
35-2012	Cooks, Institution and Cafeteria	6	\$11.78	\$20,621.80	No formal credential	None	Short-term
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	6	\$11.06	\$19,348.46	No formal credential	None	Short-term
35-2019	Cooks, All Other	6	\$10.81	\$18,909.87	No formal credential	None	Moderate-term
41-2021	Counter and Rental Clerks	6	\$10.65	\$18,630.01	No formal credential	None	Short-term
51-3011	Bakers	6	\$10.49	\$18,357.20	No formal credential	None	Long-term
43-5081	Stock Clerks and Order Fillers	6	\$10.42	\$18,231.91	No formal credential	None	Short-term
53-7061	Cleaners of Vehicles and Equipment	6	\$10.35	\$18,119.09	No formal credential	None	Short-term
51-6011	Laundry and Dry-Cleaning Workers	6	\$9.83	\$17,194.22	No formal credential	None	Short-term
53-7064	Packers and Packagers, Hand	6	\$9.60	\$16,800.06	No formal credential	None	Short-term
35-3041	Food Servers, Nonrestaurant	6	\$9.26	\$16,209.44	No formal credential	None	Short-term
35-9099	Food Preparation and Serving Related Workers, All Other	6	\$9.20	\$16,107.74	No formal credential	None	Short-term

Occupations in Tourism Industries, Lewis County							
SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
53-6031	Automotive and Watercraft Service Attendants	6	\$9.18	\$16,062.36	No formal credential	None	Short-term
53-3041	Taxi Drivers and Chauffeurs	6	\$9.15	\$16,016.06	No formal credential	None	Short-term
39-3091	Amusement and Recreation Attendants	6	\$9.02	\$15,780.32	No formal credential	None	Short-term
53-6021	Parking Lot Attendants	6	\$8.77	\$15,354.50	No formal credential	None	Short-term
33-9092	Lifeguards, Ski Patrol, and Other Recreational Protective Service Workers	6	\$8.70	\$15,228.50	No formal credential	None	Short-term
35-3022	Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	6	\$8.64	\$15,119.92	No formal credential	None	Short-term
27-1012	Craft Artists	6	\$4.71	\$8,250.89	No formal credential	None	Long-term
25-4012	Curators	6	\$22.66	\$39,659.76	Master's degree	None	None
41-1012	First-Line Supervisors of Non-Retail Sales Workers	6	\$25.88	\$45,295.52	High school diploma	< 5 yrs	None
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	6	\$25.76	\$45,085.32	High school diploma	< 5 yrs	None
53-1031	First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	6	\$23.19	\$40,579.82	High school diploma	< 5 yrs	None
43-6011	Executive Secretaries and Executive Administrative Assistants	6	\$21.65	\$37,887.67	High school diploma	< 5 yrs	None
43-1011	First-Line Supervisors of Office and Administrative Support Workers	6	\$21.10	\$36,922.16	High school diploma	< 5 yrs	None
35-1011	Chefs and Head Cooks	6	\$20.97	\$36,702.90	High school diploma	< 5 yrs	None
37-1012	First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	6	\$19.42	\$33,978.64	High school diploma	< 5 yrs	None

Occupations in Tourism Industries, Lewis County

SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	6	\$18.58	\$32,520.39	High school diploma	None	Long-term
11-9051	Food Service Managers	6	\$17.36	\$30,376.73	High school diploma	< 5 yrs	None
43-3051	Payroll and Timekeeping Clerks	6	\$16.91	\$29,590.26	High school diploma	None	Moderate-term
37-1011	First-Line Supervisors of Housekeeping and Janitorial Workers	6	\$16.32	\$28,566.50	High school diploma	< 5 yrs	None
51-3092	Food Batchmakers	6	\$15.82	\$27,692.74	High school diploma	None	Moderate-term
49-3051	Motorboat Mechanics and Service Technicians	6	\$15.71	\$27,495.98	High school diploma	None	Long-term
51-6093	Upholsterers	6	\$15.30	\$26,781.33	High school diploma	None	Moderate-term
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	6	\$14.27	\$24,966.87	High school diploma	None	Short-term
39-1021	First-Line Supervisors of Personal Service Workers	6	\$14.16	\$24,771.63	High school diploma	< 5 yrs	None
41-3099	Sales Representatives, Services, All Other	6	\$13.93	\$24,381.02	High school diploma	None	Moderate-term
41-9011	Demonstrators and Product Promoters	6	\$13.63	\$23,845.99	High school diploma	None	Short-term
25-3021	Self-Enrichment Education Teachers	6	\$13.14	\$22,995.88	High school diploma	< 5 yrs	None
53-3033	Light Truck or Delivery Services Drivers	6	\$13.03	\$22,804.16	High school diploma	None	Short-term
43-4051	Customer Service Representatives	6	\$12.92	\$22,614.98	High school diploma	None	Short-term
43-4171	Receptionists and Information Clerks	6	\$12.57	\$21,998.44	High school diploma	None	Short-term
39-2021	Nonfarm Animal Caretakers	6	\$12.56	\$21,985.12	High school diploma	None	Short-term
33-9032	Security Guards	6	\$12.53	\$21,931.56	High school diploma	None	Short-term
11-9081	Lodging Managers	6	\$12.36	\$21,634.58	High school diploma	< 5 yrs	None
39-7011	Tour Guides and Escorts	6	\$12.19	\$21,335.08	High school diploma	None	Moderate-term

Occupations in Tourism Industries, Lewis County

SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Annual Wage at 35hrs/50 weeks	Typical Entry Level Education	Work Experience Required	Typical On-The-Job Training
43-9061	Office Clerks, General	6	\$11.55	\$20,209.00	High school diploma	None	Short-term
27-3012	Public Address System and Other Announcers	6	\$11.42	\$19,991.56	High school diploma	None	Short-term
39-9031	Fitness Trainers and Aerobics Instructors	6	\$11.24	\$19,665.32	High school diploma	None	Short-term
43-4181	Reservation and Transportation Ticket Agents and Travel Clerks	6	\$10.95	\$19,157.20	High school diploma	None	Short-term
39-6012	Concierges	6	\$10.65	\$18,635.85	High school diploma	None	Moderate-term
27-4021	Photographers	6	\$10.52	\$18,410.53	High school diploma	None	Long-term
39-6011	Baggage Porters and Bellhops	6	\$10.32	\$18,066.60	High school diploma	None	Short-term
39-9032	Recreation Workers	6	\$9.99	\$17,484.19	High school diploma	None	Short-term
53-3031	Driver/Sales Workers	6	\$9.54	\$16,698.61	High school diploma	None	Short-term
39-9011	Childcare Workers	6	\$7.14	\$12,494.68	High school diploma	None	Short-term
11-1011	Chief Executives	6	\$46.73	\$81,782.42	Bachelor's degree	< 5 yrs	None
11-2022	Sales Managers	6	\$39.25	\$68,685.12	Bachelor's degree	< 5 yrs	None
11-1021	General and Operations Managers	6	\$35.25	\$61,690.33	Bachelor's degree	< 5 yrs	None
11-3011	Administrative Services Managers	6	\$32.13	\$56,234.35	Bachelor's degree	< 5 yrs	None
13-2011	Accountants and Auditors	6	\$24.72	\$43,252.09	Bachelor's degree	None	None
27-2041	Music Directors and Composers	6	\$24.04	\$42,071.31	Bachelor's degree	< 5 yrs	None
11-9199	Managers, All Other	6	\$23.13	\$40,473.09	Bachelor's degree	< 5 yrs	None
13-1121	Meeting, Convention, and Event Planners	6	\$18.33	\$32,072.09	Bachelor's degree	None	None
27-1011	Art Directors	6	\$14.64	\$25,623.23	Bachelor's degree	< 5 yrs	None
27-3043	Writers and Authors	6	\$13.82	\$24,192.81	Bachelor's degree	None	Moderate-term
27-2022	Coaches and Scouts	6	\$13.04	\$22,823.45	Bachelor's degree	None	None
27-1014	Multimedia Artists and Animators	6	\$10.20	\$17,841.99	Bachelor's degree	None	Moderate-term
27-1013	Fine Artists, Including Painters, Sculptors, and Illustrators	6	\$6.81	\$11,913.64	Bachelor's degree	None	Long-term

Source: EMSI

Attachment C – References

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