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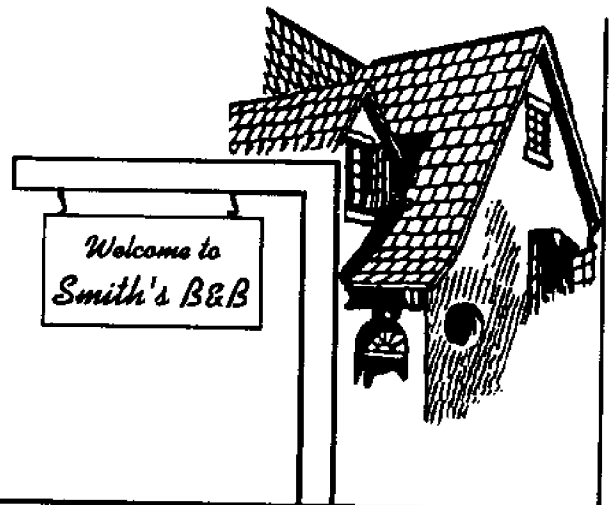
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NEW YORK'S 1993 BED AND BREAKFAST AND INN INDUSTRY

by

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INTRODUCTION

Most bed and breakfasts and inns in New York state typically fit into three basic categories: private home B&Bs, B&B inns, and country inns. Private home B&Bs typically operate in a private residence, have one to four guest rooms that may accept up to nine guests, and serve breakfast to guests only. B&B inns operate either in a private residence or lodging facility, have 5 to 24 guest rooms, and serve breakfast to guests only. Country inns typically operate in a lodging facility with 5 to 24 rooms and have full-service dining for both guests and the public. B&Bs and inns that do not fit into one of these three categories (e.g., a B&B with four rooms and dining facilities for both guests and the public) are categorized as "other B&Bs and inns" in this report.

The purpose of this study is to identify the present status of New York state's bed and breakfast and inn industry and to provide B&B and inn owners with up-to-date marketing, promotion, and business management information. This is an update to the New York state bed and breakfast survey of 1987 and its 1989 update (Dawson and Brown 1987; Dawson 1989).

METHODS

During the winter of 1993–1994, a mailing list of B&Bs and inns across New York state was compiled using information from tourism promotion agencies, chambers of commerce, B&B and lodging associations, B&B and inn reservation services, and other published listings (Seligman 1993). A survey tool was developed based on NY Sea Grant's B&B questionnaire of 1987 (Dawson and Brown 1987). Unlike the survey of 1987, surveys were not given to reservation services to distribute to their B&B and inn customers in the 1994 survey since this was found to be ineffective in 1987. B&Bs and inns that are promoted through reservation services alone were thus not included in this survey. Many of these B&Bs and inns are found in the New York City metropolitan area and on Long Island.

Between April and June 1994, 1,171 surveys were distributed to lodging businesses across the state. Of

these, 1,069 (91%) were operating B&Bs and inns, 22 (2%) had gone out of business, 29 (3%) did not categorize themselves as B&Bs or inns, and 51 (4%) had moved or changed addresses. Of the 1069 that were identified as operating B&Bs and inns, 419 returned completed questionnaires (a return rate of 39%).

B&B and inn owners and managers were asked to respond to the survey for the 1993 calendar year. The data collected from the questionnaires were analyzed for the state as a whole, according to B&B category (private home B&B, B&B inn, country inn, and other B&B and inn lodging), and by New York State Department of Economic Development (NYSDED) region. The number of B&Bs and inns existing in each region was derived from the mailing list and used to calculate the estimated number of guest rooms, daily capacity, number of guests served, number of room-nights, and guest lodging expenditures for each region in 1993.

STATEWIDE RESULTS

General business information

Of the 419 owners that returned questionnaires, 273 (65%) were categorized as private home B&Bs, 76 (18%) as B&B inns, 49 (12%) as country inns, and 21 (5%) as other B&Bs and inns that did not fit these three categories. The total number of private home B&Bs in New York state is estimated to be 697, while B&B inns are estimated at 194, country inns at 125, and other B&Bs and inns, 53. While most B&B and inn businesses are open full time during the year, 15% are open part-time (i.e., on weekends only) at least one season every year. The average price for a double occupancy room was \$67, with 76% of B&Bs and inns priced between \$40 and \$79 (Table 1). The total guest expenditures for B&B and inn room charges in New York was estimated at \$28,511,680 in 1993 (Table 2).

Most B&Bs and inns opened around 1980, and have been owned by the current owner an average of 6.6 years. B&B and inn owners and managers said that they

Table 1. Price ranges of B&Bs and inns (double occupancy).

Price range	Percent B&Bs and inns in price range
<\$40	4%
\$40-49	12
\$50-59	24
\$60-69	25
\$70-79	15
\$80-89	7
\$90-99	4
\$100-149	7
\$150+	2

decided to operate a lodging business for the following reasons: to provide a supplemental income (64%), to meet people (50%), to restore an old or historic building (32%), to help finance their home (25%), for the tax advantage (21%), and for other reasons such as keeping busy after retirement and running their own business (28%). Most B&Bs and inns are sole proprietorships (70%), while 15% are corporations and 15% are partnerships. Seven percent of the B&Bs and inns are listed on the National Register of Historic Places, and 3% are currently applying for this status.

B&Bs and inns are primarily located on lands zoned for residential (50%), agricultural (14%), and commercial (9%) purposes or other zoned areas (e.g., industrial, commercial-residential; 12%); 15% are located in areas without zoning. Many of the respondents (29%) stated that they either had to have their zoning changed (i.e., re-zoned, variance, or special permit) or are currently undergoing this change in order to operate their B&B or inn. When asked if their property has been recently reassessed for tax purposes as "commercial," 15% stated that it has been. Of these owners, 57% indicated that their utility company started charging commercial rates because of this.

B&Bs and inns across the state served an average of 624.0 guests each in 1993, and had their rooms occupied an average of 397.2 room-nights (i.e., the number of nights each room in a B&B or inn is occupied totaled together; Table 3). Half of the owners (50%) stated that the number of room-nights for their B&B or inn increased between 1992 and 1993; 18% said they decreased, 18% remained at the same level, 4% did not know, and 10% were not open in 1992. Average occupancy on weekends was 66% in the summer, 56% in the fall, 33% in the winter, and 32% in the spring.

Most B&B and inn owners (81%) have domestic kitchens in their homes, while 15% have commercial kitchens and 4% have some other type. While most private home B&Bs and B&B inns have domestic kitchens (98% and 80%, respectively), the majority of country inns (86%) have commercial kitchens. Of the owners surveyed, 11% said that they were required to remodel their kitchen in order to meet health or food-service regulations. Almost all B&Bs and inns serve breakfast (80% serve full breakfast and 31% serve continental); 23% serve an afternoon tea, 9% lunch, and 19% dinner. While most of those who serve a full breakfast include it in the room charge (95%), only 13% and 20% include lunch and dinner, respectively.

B&B and inn owners indicated that diverse amenities and recreational facilities are located on their properties for their guests to use. Porches or patios and sitting rooms exist in 90% and 87%, respectively, of the B&Bs and inns. Other common amenities include fireplaces (found in 57% of B&Bs and inns), outdoor cooking facilities (36%), hiking and/or cross-country skiing trails (31%), and fishing access (25%; Table 4). An average of 4.2 private bathrooms were found in 69% of the B&Bs and inns surveyed; 63% had an average of 1.9 bathrooms shared by guests, and 14% had an average of 1.2 bathrooms shared by both guests and members of the host family.

Table 2. Regional estimates for total number of guest rooms in region, daily guest capacity, number of guests served, number of room-nights, and visitor lodging expenditures.

Lodging category	Estimated no. guest rooms	Estimated daily guest capacity	Estimated no. guests served	Estimated no. room-nights	Estimated guest lodging expenditures
New York State	5,452	12,935	667,056	424,660	\$28,511,680
Long Island	200	432	26,425	21,779	2,014,560
Hudson Valley	328	697	63,756	22,100	1,862,620
Catskills	1,138	2,690	72,567	53,427	3,988,330
Capital	314	671	34,584	30,068	2,421,120
Adirondacks	1,120	2,835	158,865	120,155	7,716,350
Thousand Islands	290	635	18,154	12,137	606,860
Central Leatherstocking	573	1,338	64,930	26,930	1,694,460
Finger Lakes	1,066	2,465	153,671	86,363	5,601,490
Niagara Frontier	232	518	25,396	22,534	1,333,120
Chautauqua-Allegheny	343	1,040	61,162	41,668	\$2,791,730

Table 3. Average number of guest rooms, guests served, and room-nights, and daily guest capacity by lodging category and for New York state as a whole in 1993.

Lodging category	Number of guest rooms	Daily guest capacity	Number of guests served	Number of room-nights
New York state	5.1	12.1	624.0	397.2
Private home B&B	3.2	7.0	233.0	159.2
B&B inn	6.9	15.2	1,011.2	614.0
Country inn	12.6	31.6	2,191.0	1,233.4
Other B&Bs and inns	5.5	19.1	1,252.4	991.3

Guests are able to pay with credit cards in 51% of the B&Bs and inns. When asked if children under the age of 12 are allowed to stay at their B&Bs and inns, 79% said "yes." Most owners (80%) said that they do not permit pets. Reservations are required by 48% of B&B and inn owners.

With regard to the employment of persons from outside B&B and inn owners' households, 31% of the respondents stated that they do hire additional help. Those that do hire additional help employ an average of 2.5 full-time and 4.7 part-time persons per year. Country inns and B&B inns hire the majority of these workers (Table 5). The estimated full-time and part-time employment by B&Bs and inns in New York State in 1993 was 827 and 1,529 employees, respectively, totaling an estimated 2,356 persons.

The types of insurance carried by owners varies between businesses. Many B&Bs and inns carry only one type of insurance such as general homeowner's insurance (25% carried this form), B&B insurance (24%), general business comprehensive insurance (18%), or liability insurance (5%); others (11%) carry a combination of two or more of these. Many owners (17%) carry homeowner's insurance with a B&B rider. The majority of country inns carry general business comprehensive insurance, while most private home B&Bs carry homeowner's insurance either by itself or with a B&B rider; B&B inns carry a combination of homeowner's insurance, B&B insurance, and/or general business comprehensive insurance.

The majority of B&B and inn owners (57%) belong to some type of lodging association; 20% of these are members of national B&B or inn associations, 31% belong to New York state associations, and 44% are members of regional or county associations. Most owners (74%) are members of their local chamber of commerce. The 30% of owners belonging to reservation services have done so for an average of 3.5 years.

Table 4. Amenities and recreational opportunities offered on the property of B&Bs and inns.

Amenity	Percent B&Bs and inns offering amenity
Porch and/or patio	90%
Sitting room and/or parlor	87
Fireplace	57
Outdoor cooking facilities	36
Hiking and/or cross-country skiing trails	31
Fishing	25
Bicycle loans and/or rentals	19
Laundry facilities	17
Gift shop	17
Hot tub, sauna, and/or whirlpool	13
Boating	12
Beach	10
Swimming pool	9
Tennis courts	5
Horseback riding stables	2

Table 5. Percent B&Bs and inns that employ staff outside of their household, and the average number of employees that work for these businesses.

Lodging category	Percent businesses employing staff	Average no. full-time employees hired	Average no. part-time employees hired
New York state	31%	2.5	4.7
Private home B&Bs	14	0.1	1.7
B&B inns	43	1.2	3.8
Country inns	96	5.4	8.0
Other B&Bs and inns	43	3.0	3.2

The top five concerns of B&B and inn owners are: government regulations, especially those concerning health and fire code permits and inspections; increasing or maintaining high occupancy rates; high income and business taxes; advertising and the costs of it; and liability. Government regulations, and health and fire code permits and inspections are by far the most pressing concerns of B&B and inn owners, with 12% of the 49 respondents that answered this question listing them. Other concerns included maintaining a cash flow, obtaining adequate insurance, and IRS audits.

Promotion

B&B and inn owners across the state spent an average of \$2,297 on promotion in 1993. Private home B&Bs spent considerably less than the average (\$736), while B&B inn and country inn operators spent more (\$2,394 and \$10,324, respectively). The average return rate for B&B and inn guests in New York state was 39% in 1993. Private home B&B operators had a lower-than-average return rate (34%), while B&B inn and country inns had higher rates (43% and 54%, respectively).

Most B&B and inn owners use several different forms of promotion to attract customers to their businesses. These forms of promotion are ranked by their effectiveness rating (a scale of 1 to 3 is used where 1 is not effective and 3 is highly effective) in Table 6. Those most highly ranked are referrals or word of mouth advertising, brochures of the B&B or inn business, listing the business with chambers of commerce, advertising in B&B and inn guidebooks, and advertising or being included in tourism promotion agency guidebooks. While the effectiveness rating of reservation services was moderate (1.91), the percentage

of bookings received through reservation services by B&B and inn operators who use them was high (12%).

The use of promotional techniques differs according to lodging category (i.e., country inn, B&B inn, or private home B&B) in several instances. Reservation services were rated as very effective for private home B&Bs (2.10 effectiveness rating) and accounted for an average 16% of private home B&B bookings. However, the effectiveness of reservation services was rated lower than average for country inns and B&B inns. The effectiveness rating for country inns advertising in newspapers and magazines was higher than average (2.15, and 2.17, respectively). While only 10% of country inn operators claimed to advertise on TV, the effectiveness of this form of promotion was rated high by them (2.50). Country inns also gave the use of direct mail a higher-than-average effectiveness rating (2.32), while promotion through chambers of commerce was given a lower-than-average rating (1.81).

Offering package deals was ranked sixth in effectiveness, even though only 26% of B&B and inn owners offer packages to their customers. Most package deals are done in conjunction with restaurants (43%), downhill skiing areas (30%), golf courses (23%), cross-country skiing areas (22%), and/or charter boat or guide services (15%). Offering package deals was especially effective for country inns (2.48 effectiveness rating), which had 8% of their bookings from package deals. Owners that do not offer packages said that they did not because their business does well without them, they do not know how to arrange them, or it is too time consuming to organize them.

Table 6. Forms of promotion, their effectiveness ratings on a scale of 1 to 3 (1=not effective, 2=fairly effective, and 3=highly effective), and the percent bookings received by B&B and inn owners from each. These are ranked according to their effectiveness rating.

Form of promotion	Percent owners using this form	Effectiveness rating	Percent bookings
Referrals/word-of-mouth	94%	2.82	35%
Brochures of business	84	2.49	14
Chamber of commerce	73	2.48	17
B&B and inn guidebook	52	2.31	10
Tourism promotion agency guidebooks	60	2.25	11
Offering package deals	26	2.17	6
Direct mail	31	2.16	8
Sign out front B&B or inn	70	2.08	9
B&B and inn association	47	2.04	9
Magazines	28	2.01	7
Television	4	1.92	2
Reservation Service	28	1.91	12
Newspapers	43	1.76	8
Travel agents	27	1.67	2
Radio	8	1.59	1
Other forms (including AAA travel guide and yellow pages)	14	2.56	22

Marketing

Identifying the types of customers that come to B&Bs and inns and where they come from is important to consider when planning a marketing strategy. Most guests that stay at B&Bs and inns in New York are couples (64%) or families (19%); business travelers and tour groups make up smaller percentages (9% and 1%, respectively; Table 7). Country inns tend to receive slightly more families and business travelers than average (22% and 11%, respectively). B&Bs and inns located in cities having more than 10,000 people in population tend to receive the highest percentage of business travelers (19%) and lower percentages of couples and families (61% and 14%, respectively). Country inns receive a much higher percentage of tour groups than average (5%), probably because their large size enables them to accommodate larger groups.

While half of the guests staying at B&Bs and inns are from within New York state (50%), other states and Canada also contribute large percentages (35% and 11%, respectively; Table 8). Country inns and B&B inns receive a slightly higher percentage of visitors from within New York (56% and 53%, respectively), while private home B&B operators receive a higher percentage of customers from other states (37%).

Most of the guests from states other than New York come from those that are nearby (i.e., Pennsylvania, New Jersey, Connecticut, Massachusetts, Vermont, and Ohio; Table 9). Of this 35%, 20% come from Pennsylvania and 26% from New Jersey; 19% come from other states not listed in Table 9. Of the owners who receive visitors from states not listed, 70% said they receive guests from California, 55% from Florida, 33% from Texas, 31% from Virginia, and 27% from Michigan; 27% of these owners received guests from other states in the Northeast (i.e., Maine, New Hampshire, and Rhode Island).

Visitors from foreign countries comprise an average 4% of guests statewide (Table 8). Of the B&B and inn owners who said they receive guests from other countries, 86% said they receive guests from Canada, 57% from Great Britain, 47% from Germany, and 33% from France (Table 10). A high percentage of B&Bs and inns also receive guests from Australia, the Netherlands, Japan, and Ireland.

Most guests stay either one or two nights (44% and 42%, respectively; Table 11). This indicates that many guests travel to B&Bs and inns for weekend getaways. Occupancy data reveal much higher occupancy rates on weekends than weekdays (e.g., weekend occupancy in the summer was 66% while weekday occupancy was 40%).

When asked why they think visitors stay at their B&B or inn, 46% of the owners stated that location was the primary reason. Hospitality and food were also mentioned by 39% and 32% of the owners, respectively.

Table 12 lists the top 10 reasons why guests stay at B&Bs and inns.

REGIONAL RESULTS

B&B and inn owners from 10 of the 11 regions in New York state recognized by the NYSDED returned questionnaires, the New York City area being the exception (while two B&Bs or inns exist in New York City, neither participated in the survey; Figure 1). The following marketing results are given by region. Additional information on lodging businesses in the Adirondack North Country region (which includes the Adirondack and Thousand Islands regions discussed below) can be found in the *Bicycle master plan for the Adirondack North Country region of New York state* (Holmes et al. 1994).

Long Island

The Long Island region is comprised of Nassau and Suffolk counties (Figure 1). Only eight B&Bs and inns returned questionnaires, 50% of which were private home B&Bs and the other 50% B&B inns. The average room charge in this region was the highest in the state (\$92 per double-occupancy room). Estimates of number of guests served, number of room-nights, and visitor lodging expenditures are moderate to low in comparison to other regions in New York state (Table 2).

B&Bs and inns on Long Island receive the second highest percentage of couples in New York (72%) and a high percentage of business travelers (11%; Table 7). However, the percentage of tour groups received by the owners answering the questionnaire was 0%. Most of the guests to this region are from within New York state (66%), and few guests come from Canada (2%; Table 8). Of the 28% of guests that come from other states, many come from New Jersey (30%) and Connecticut (30%; Table 9). Guests tend to stay longer than average in this region, with 52% staying two nights and 9% staying three. The percentages of guests staying four to seven and eight to fourteen nights are the highest in the state (9% and 2%, respectively; Table 11). The return rate of guests to this region is lower than average at 38%.

Hudson Valley

The Hudson Valley region is comprised of Westchester, Rockland, Putnam, Dutchess, Columbia, and Orange counties (Figure 1). Thirty-one B&Bs and inns returned questionnaires for this region, 64% of which were private home B&Bs, 13% B&B inns, 13% country inns, and 10% other B&Bs or inns. This region had the second highest average room charge in the state (\$84 per double-occupancy room). Estimates of number of guests served, number of room-nights, and visitor lodging expenditures are moderate to low (Table 2).

Like the Long Island region, the Hudson Valley region has a high percentage of couples and business travelers staying at its B&Bs and inns (68% and 14%, respec-

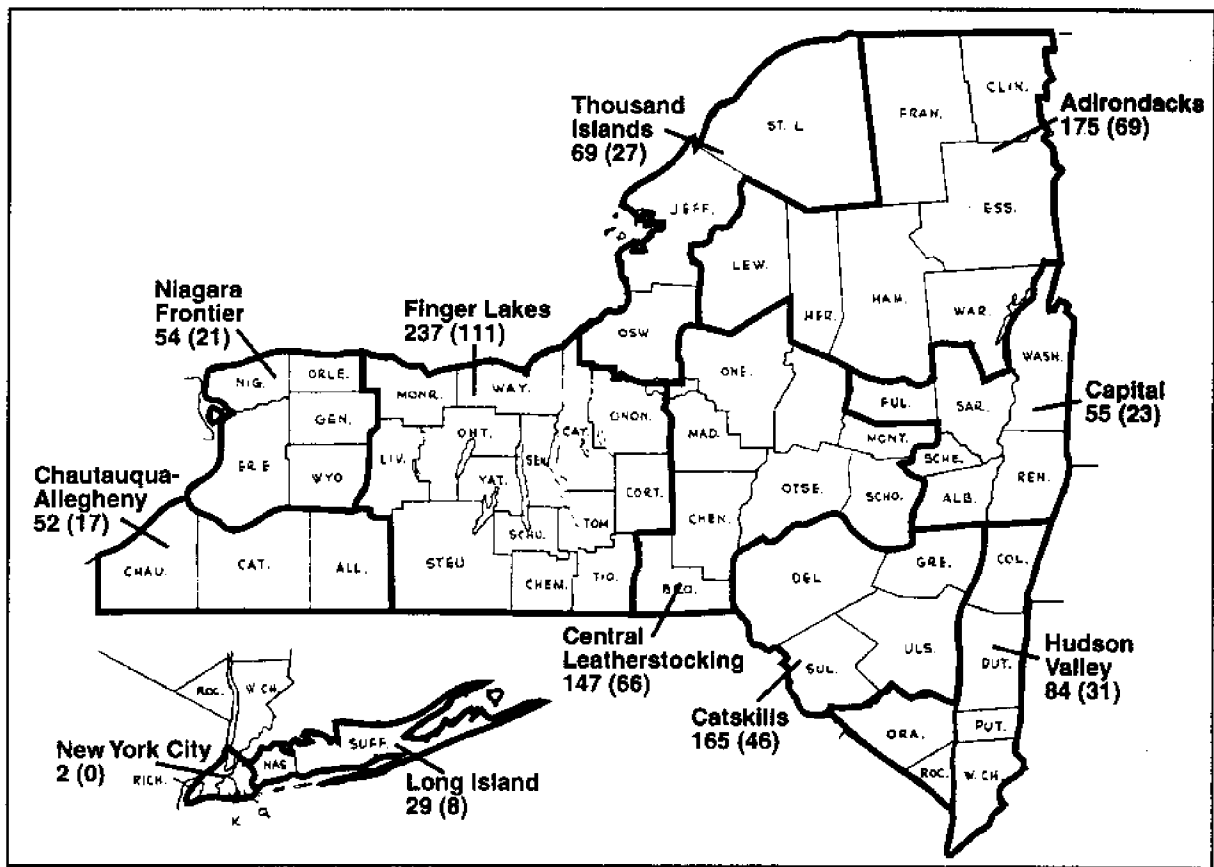


Figure 1. Number of existing B&Bs and inns, and (in parentheses) number of survey respondents by New York State Department of Economic Development region.

Table 7. Percentages of customers that stay in B&Bs and inns by region in New York state.

Region	Guest Type				
	Families	Couples	Business travelers	Tour groups	Other groups
New York state	19%	64%	9%	1%	7%
Long Island	14	72	11	0	3
Hudson Valley	15	68	14	0	3
Catskills	23	64	3	3	7
Capital	9	79	9	0	3
Adirondacks	23	68	5	2	2
Thousand Islands	16	49	7	2	26
Central Leatherstocking	28	57	12	1	2
Finger Lakes	17	63	11	1	8
Niagara Frontier	13	64	5	0	18
Chautauqua-Allegheny	14	65	15	3	3

Table 8. Percentages of B&B and inn customers according to their area of residence.

Region	Guests' Area of Residence			
	New York state	Other states	Canada	Other foreign countries
New York state	50%	35%	11%	4%
Long Island	66	28	2	4
Hudson Valley	54	36	2	8
Catskills	67	27	2	4
Capital	56	34	6	4
Adirondacks	49	30	17	4
Thousand Islands	57	34	7	2
Central Leatherstocking	45	43	9	3
Finger Lakes	46	36	13	5
Niagara Frontier	28	45	18	9
Chautauqua-Allegheny	46	31	22	1

Table 9. The percentage of guests according to their state of residence for those coming from states other than New York (see "Other states," Table 8).

Region	Guests' State of Residence						
	PA	OH	NJ	CT	MA	VT	Other states
New York state	20%	9%	26%	11%	11%	4%	19%
Long Island	7	0	30	30	13	4	16
Hudson Valley	13	2	31	13	18	3	20
Catskills	13	1	55	15	6	2	8
Capital	8	2	39	18	18	5	10
Adirondacks	15	3	35	12	12	8	15
Thousand Islands	42	2	17	11	11	4	13
Central Leatherstocking	15	5	24	15	15	3	23
Finger Lakes	27	12	16	6	9	3	27
Niagara Frontier	30	29	8	2	6	1	24
Chautauqua-Allegheny	28	46	4	6	2	1	13

tively; Table 7). It has a higher-than-average percentage of guests coming from New York state (54%) and other states (36%). Although a low percentage of guests are from Canada (2%), it has the second highest percentage of guests from foreign countries other than Canada (8%; Table 8). Of the 36% of guests from states other than New York, most come from New Jersey (31%) and Massachusetts (18%; Table 9). Most visitors stay at B&Bs and inns in this region for one to two nights (Table 11), and the return rate of guests to this region is slightly below average at 38%.

Catskills

The counties of Ulster, Greene, Sullivan, and Delaware make up the Catskill region (Figure 1). Forty-six B&B and inn owners returned questionnaires from this region, 59% of which were private home B&Bs, 11% B&B inns, 26% country inns, and 4% other B&Bs and inns. The double-occupancy room charge for this region, \$75, is higher than the state average. This region has a very high estimated daily guest capacity and served a high

estimated number of guests in 1993 (Table 2).

B&Bs and inns in the Catskill region accommodate the third highest percentage (23%) of family groups of all regions in New York and one of the highest percentages of tour groups (3%). However, they also receive the lowest percentage of business travelers (3%; Table 7). The majority of guests are from within New York (67%), while few guests are from Canada (2%; Table 8). Of the 27% of guests that travel from other states, most (55%) are from New Jersey (Table 9). Guests tend to stay mainly for one or two nights (Table 11), and the return rate to this region is higher than average at 41%.

Capital Region

The Capital region is comprised of the counties of Albany, Saratoga, Schenectady, Rensselaer, Fulton, and Washington (Figure 1). Twenty-three B&Bs and inns returned questionnaires, 56% of which were private home B&Bs, 22% B&B inns, and 22% country inns. This region has the third highest double-occupancy room

charge in the state (\$81). Estimates of number of guests served, number of room-nights, and visitor lodging expenditures are moderate to low (Table 2).

This region has the lowest percentage of families staying at its B&Bs and inns (9%), but the highest percentage of couples (79%; Table 7). The majority of guests come from within New York state (56%; Table 8). Of the 34% of guests that come from other states, most are from New Jersey (39%), Connecticut (18%), and Massachusetts (18%; Table 9). While most guests stay for either one or two nights, a large percentage of guests (10%) stay for three nights (Table 11). The return rate of guests to this region, 35%, is below the state average.

Table 10. Percentage of B&Bs and inns that receive guests from foreign countries.

Country	Percentage of B&Bs and inns
Canada	86%
Great Britain	57
Germany	47
France	33
Australia	22
Netherlands	21
Japan	21
Ireland	10
Switzerland	9
Italy	9
Asia	8
South Africa	8
Spain	7
Israel	5
Austria	4
Mexico	4
Brazil	4

Adirondacks

The Adirondack region is comprised of Warren, Hamilton, Essex, Clinton, Franklin, Lewis, and northern Herkimer counties (Figure 1). Sixty-nine B&Bs and inns returned questionnaires from this region, 53% of which were private home B&Bs, 20% B&B inns, 20% country inns, and 7% other B&Bs and inns. The average double-occupancy rate in this region is slightly below average at \$64. This region has the highest estimated number of guest rooms in the state (1,120.0), as well as the highest estimated number of guests served, number of room-nights, and visitor lodging expenditures (Table 2).

Adirondack B&Bs and inns receive very high percentages of couples and families (68% and 23%, respectively; Table 7). While most visitors come from either New York state or other states, a very high percentage come from Canada (17%; Table 8). Of the 30% of guests that come from states other than New York, most come from New Jersey (35%) and Pennsylvania (15%; Table 9). Guests tend to stay one to three nights (Table 11). The return rate for guests to this region, 51%, is the highest in the state.

Thousand Islands

The Thousand Islands region is made up of St. Lawrence, Jefferson, and Oswego Counties (Figure 1). Twenty-seven B&Bs and inns returned questionnaires from this region, 81% of which were private home B&Bs, 15% B&B inns, and 4% other B&Bs and inns. This region has the lowest average double-occupancy room charge (\$50) in the state. Although the estimated daily guest capacity of this region is moderately high (634.8), the estimated number of guests, number of room-nights, and visitor lodging expenditures are the lowest of all New York state regions (Table 2). This may be due to the fact that many B&Bs and inns in this region have opened to accommodate anglers during the fall fishing season and have low occupancy rates during the remaining seasons of the year.

Table 11. Percentages of B&B and inn customers according to their lengths of stay.

Region	Number of nights					
	1	2	3	4-7	8-14	14+
New York state	44%	42%	7%	5%	1%	1%
Long Island	28	52	9	9	2	0
Hudson Valley	45	44	5	4	1	1
Catskills	43	45	6	6	0	0
Capital	31	53	10	5	1	0
Adirondacks	35	46	12	6	1	0
Thousand Islands	49	39	8	3	1	0
Central Leatherstocking	53	35	6	4	1	1
Finger Lakes	44	41	7	5	1	2
Niagara Frontier	55	33	7	4	1	0
Chautauqua-Allegheny	42	38	7	7	1	5

Table 12. Top 10 reasons why customers say they stay at B&Bs and inns.

Rank	Reason	Percent owners giving response
1	Location	46
2	Hospitality	39
3	Food	32
4	Atmosphere of B&B or inn	17
5	Peacefulness of surroundings	17
6	Nearby recreational opportunities	17
7	Price	14
8	To visit nearby family and friends	12
9	Convenience	11
10	Comfort provided by B&B or inn	10

While this region receives lower-than-average percentages of couples and families, it receives the largest percentage of "other groups" (26%; Table 7). According to statements written in on the questionnaires, "other groups" includes mainly anglers and single travelers. While most visitors come from within New York state or other states, a moderately high percentage come from Canada (7%). A very low percentage, however, come from other foreign countries (2%; Table 8). Of the 34% of guests that come from other states, most are from Pennsylvania (42%) and New Jersey (17%; Table 9). Guests tend to stay for one or two nights (Table 11), and the return rate of guests to this region is high at 49%.

Central Leatherstocking

The Central Leatherstocking region consists of Oneida, Montgomery, Schoharie, Otsego, Broome, Chenango, Madison, and southern Herkimer counties (Figure 1). Sixty-six B&Bs and inns from this region returned questionnaires, 74% of which are private home B&Bs, 14% B&B inns, 8% country inns, and 4% other B&Bs and inns. The average double-occupancy room rate for this region is slightly below average at \$63. Although the estimated daily guest capacity of this region is high (1,337.7), the estimated number of guests served, number of room-nights, and visitor lodging expenditures are moderate (Table 2).

While most guests staying at B&Bs and inns in this region are either couples or families, a very high percentage of guests are business travelers (12%; Table 7). A high percentage of travelers come from states other than New York (43%) and Canada (9%; Table 8). Of those guests that do come from other states, most come from New Jersey, Massachusetts, Pennsylvania, and Connecticut (Table 9). A very high percentage of guests (53%) stay at B&Bs and inns in this region for one night (35% stay for two nights; Table 11). The return rate of guests to this region is below the state average at 33%.

Finger Lakes

The Finger Lakes region consists of the following counties: Monroe, Wayne, Cayuga, Onondaga, Seneca, Ontario, Livingston, Yates, Steuben, Schuyler, Tompkins, Cortland, Chemung, and Tioga (Figure 1). One-hundred-and-eleven B&Bs and inns returned questionnaires from this region, 73% of which were private home B&Bs, 21% B&B inns, 5% country inns, and 1% other B&Bs and inns. This region had an average double-occupancy room charge of \$65. The estimated number of guest rooms, guests served, and room-nights, as well as visitor lodging expenditures are high (Table 2).

While the majority of this region's guests are families or couples, a high percentage (11%) are business travelers (Table 7). Most guests are from either within New York state or other states. Of the 36% of guests from other states besides New York, most are from Pennsylvania, New Jersey, and Ohio (Table 9). A high percentage of guests (13%) are from Canada (Table 8). Guests tend to stay for one or two nights (Table 11), and the return rate of guests to B&Bs and inns in this region is below average at 35%.

Niagara Frontier

The Niagara Frontier consists of Orleans, Genesee, Wyoming, Erie, and Niagara counties (Figure 1). Twenty-one B&Bs and inns returned questionnaires from this region, 76% of which were private home B&Bs, 14% B&B inns, and 10% country inns. The average double-occupancy room charge for this region is the second lowest in the state at \$59. The estimated number of guest rooms, number of guests served, number of room-nights, and visitor lodging expenditures are moderate to low for this region (Table 2). Although this region contains one of the most popular tourist attractions in New York (Niagara Falls), many visitors to this area may be staying in motels and hotels instead of B&Bs and inns.

Guests to this area are mainly couples (64%) and "other groups" including anglers and single travelers (18%; Table 7). While Niagara Frontier B&Bs and inns receive a very high percentage of Canadians (18%) and guests from other foreign countries (9%), they also receive the lowest percentage of in-state guests of all the regions (28%; Table 8). Of the 45% of guests that come from states other than New York, most are from Pennsylvania and Ohio (30% and 29%, respectively; Table 9). Most guests stay at B&Bs and inns for one or two nights (Table 11). The return rate of guests to this region is below average at 36%.

Chautauqua-Allegheny

The Chautauqua-Allegheny region consists of Chautauqua, Cattaraugus, and Allegany counties (Figure 1). Seventeen B&Bs and inns returned questionnaires from this region, 29% of which were private home B&Bs, 29% B&B inns, 6% country inns, and 36% other B&Bs and inns. The average double-occupancy room

charge for this region is \$67. The estimated daily guest capacity, number of guests served, number of room-nights, and visitor lodging expenditures for this region are moderate to high (Table 2).

While most guests staying at B&Bs and inns in this region are couples (65%), a large percentage of guests are either business travelers (15%) or families (14%; Table 7). While this region attracts the largest percentage of Canadian guests of all regions (22%), most guests come from within New York or other states (Table 8). This region attracts the lowest percentage of guests from foreign countries other than Canada (1%). Of the 31% of guests from states other than New York, most come from either Ohio (46%) or Pennsylvania (28%; Table 9). Most guests stay either one or two nights (Table 11), and the return rate of guests to B&Bs and inns in this region is slightly higher than average at 40%.

CONCLUSION

The B&B and inn industry in New York has increased 5.6% since 1987 when 1,012 B&Bs and inns were identified in New York (Dawson and Brown 1987). The estimated number of room-nights has increased 125.9%, from 188,000 in 1987 to 424,660 in 1993. (NOTE: these 1993 estimates are most likely conservative since B&Bs and inns listed only with reservation services have not been included.) Over the next several years, the number of room-nights in New York will most likely continue to increase, as word-of-mouth about the B&B and inn industry continues to spread. Increased promotion of the industry to untapped domestic and foreign markets will be especially helpful (foreign guests currently comprise only 4% of guests). Marketing to these groups should be done in conjunction with regional and state tourism promotion agencies and chambers of commerce, especially for smaller businesses.

While the data presented in this report provide detailed marketing and promotion information, B&B and inn owners should continually evaluate the effectiveness of

their promotional techniques and identify where their guests come from before implementing any promotional strategy. Only by doing an in-house evaluation will owners get information specific to their business. Creating a simple form for visitors to fill out asking for their area of residence and how they found out about a business will save unnecessary promotional costs in the future.

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