

**MARKET POTENTIAL FOR
SING SING HISTORIC PRISON**

Prepared for:

The Village of Ossining, NY

The Town of Ossining, NY

Prepared by:

ConsultEcon, Inc./Office of Thomas J. Martin

Economic Research and Management Consultants

In Association with:

Davidson-Peterson Associates, Inc. and

Herbert Sprouse Consulting

This report has been annotated/revised by Westchester County Department of Planning for funding applications to State and Federal Government. All annotations and revisions footnoted.

WCDP - 12/28/2006

Table of Contents

Section		Page
I	INTRODUCTION AND ASSUMPTIONS	I.1
II.	RESIDENT MARKET AREA DEFINITION AND ANALYSIS	II-1
III.	VISITOR MARKET EVALUATION	III-1
IV.	COMPARABLE PROJECT EXPERIENCE	IV-1
V.	SUMMARY OF PRIMARY MARKET RESEARCH	V-1
VI.	PROJECTION OF VISITATION AND PHYSICAL PLANNING PARAMETERS	VI-1
VII.	OPERATIONAL MODEL	VII-1
VIII.	MARKETING BUDGET FOR THE SING SING HISTORIC PRISON	VIII-1
IX.	ECONOMIC IMPACT EVALUATION	IX-1

Section 1

INTRODUCTION AND ASSUMPTIONS

This report evaluates the market potential of the proposed Sing Sing Historic Prison, to be located at the Sing Sing Correctional Facility in the Town of Ossining, Westchester County, New York. IN preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

1. The size and design of the new facility and its exhibits will be appropriate to its market potential, and will serve to create a high quality, stimulating attraction and with board-based audience appeal and a distinctive image. The Sing Sing Historic prison will be a unique attraction I the region. This distinction will give it further visibility as a “must-see” attraction. The entrances to the site will be highly visible and well-signed. Additional land on the site will be used in a manner advantageous to the success of the Sing Sing Historic Prison.
2. The facility will be competently and effectively managed. An aggressive promotional campaign will be developed and implemented. This program will be targeted to prime travel markets. The admission price for the elements of the facility will be consistent with the entertainment and educational value offered, and with current attraction admissions prices for other comparable visitor attractions.
3. There will be no physical constraints to impede visitors to the facility, such as major construction activity. Changes in economic and social conditions due to events including, but not limited to, major recessions, major environmental problems or disasters that would negatively affect operations and visitation may impact on the results of the findings in this study, including visitor projections.
4. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible, and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. from its independent research efforts, general knowledge of the industry, and consultations with the client. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results.
5. Possession of this report does not carry wit it the right of publication. This report will be presented to third parties in its entirety and no abstracting of the report will be made without first obtaining permission of ConsultEcon, Inc., which consent will not be unreasonably withheld.
6. This report may not be used for any purpose other than that for which it was prepared. Neither all nor any part of the contents of this study shall be disseminated to the public through advertising media, news media or any other public means of communication without the prior consent of ConsultEcon, Inc.
7. This report was prepared August through December of 2001. It represents data available at that time.

Section II

RESIDENT MARKET AREA DEFINITION AND ANALYSIS

Project Description and Location

The Sing Sing Historic Prison will be located adjacent to and within the walls of the still operating Sing Sing Correctional Facility in the Town of Ossining, New York. The Sing Sing Historic Prison will be a public-accessible interpretive center that will trace the history and development of the correctional facility from its founding in 1825. The history of Sing Sing will be placed within the wider context of the development of the penitentiary, the history of punishment, and the prison reform movements in America that have shaped the development of the modern prison and American culture in general.

The current concept design¹ for the Sing Sing Historic Prison will take visitors through four main exhibit areas, briefly presented here.

- *Sing Sing and the Genesis of the American Prison.* Located in the former prison powerhouse building, adjacent to the prison, this will be the entry point for visitors. Here Sing Sing is introduced with exhibits and a film. As well, the history of punishment in Colonial and Post-Revolutionary America up to 1820 is interpreted.
- *Up the River.* A secure, covered walkway will move visitors between the powerhouse and the original 1825 prison cellblock, which is located within the prison walls. Exhibitory in this gallery describes the mode of transport used by Sing Sing visitors and inmates as they went ‘up the river’ from New York City. As well, visitors will walk through the intake process that a new inmate would have experienced in the 19th century.
- *Cellblock.* The 1825 Cellblock will be the major component of the visitor experience. The cellblock, though now largely destroyed, is the original prison structure built in 1825 by convicts. The remaining prison walls will be roofed over and partially re-created to interpret the history of the cellblock and provide visitor-accessible cells. An elevator ride will re-create an isolation cell experience.
- *Death House/Sing Sing Today.* The final visitor exhibits will treat the issue of capital punishment at Sing Sing and bring the Sing Sing story to the present. Featured exhibits will include the development of electrocution as a form of capital punishment, including its controversies, and the stories of individual condemned prisoners. As well, the original electric chair and a re-created execution room will be interpreted. (Visitors may choose to bypass these exhibits.) Interpretive panels will depict the operation of Sing Sing at the present day and visitors will have the opportunity to listen to oral histories recorded over the years.

The Sing Sing Correctional Facility is located in the Town of Ossining, Westchester County, New York, on the banks of the H. The 55-acre complex is highly visible from the river and the west bank of the H, and is located adjacent to the Metro-North train station for the Town.

¹ Concept design by DMCD Incorporated, New York, NY.

The resident market for an attraction such as Sing Sing Historic Prison is defined as the area whose residents would visit the attraction as a day-trip. Visiting Sing Sing Historic Prison would be a primary purpose or important part of the day-trip. Resident markets are analyzed within a “gravity model” context, that is, the closer residents live to the attraction, the more likely they are to visit it. Resident market definitions for an attraction can also be affected by the presence of physical barriers such as mountains or bodies of water. Depending on the individual market circumstances such as those outlined above, resident markets can extend up to 100 miles or be as narrow as 25 miles. Beyond the resident market area, potential markets for Sing Sing Historic Prison changes over to visitor or tourist markets. These visitor or tourist markets will be reviewed in the next section of this report.

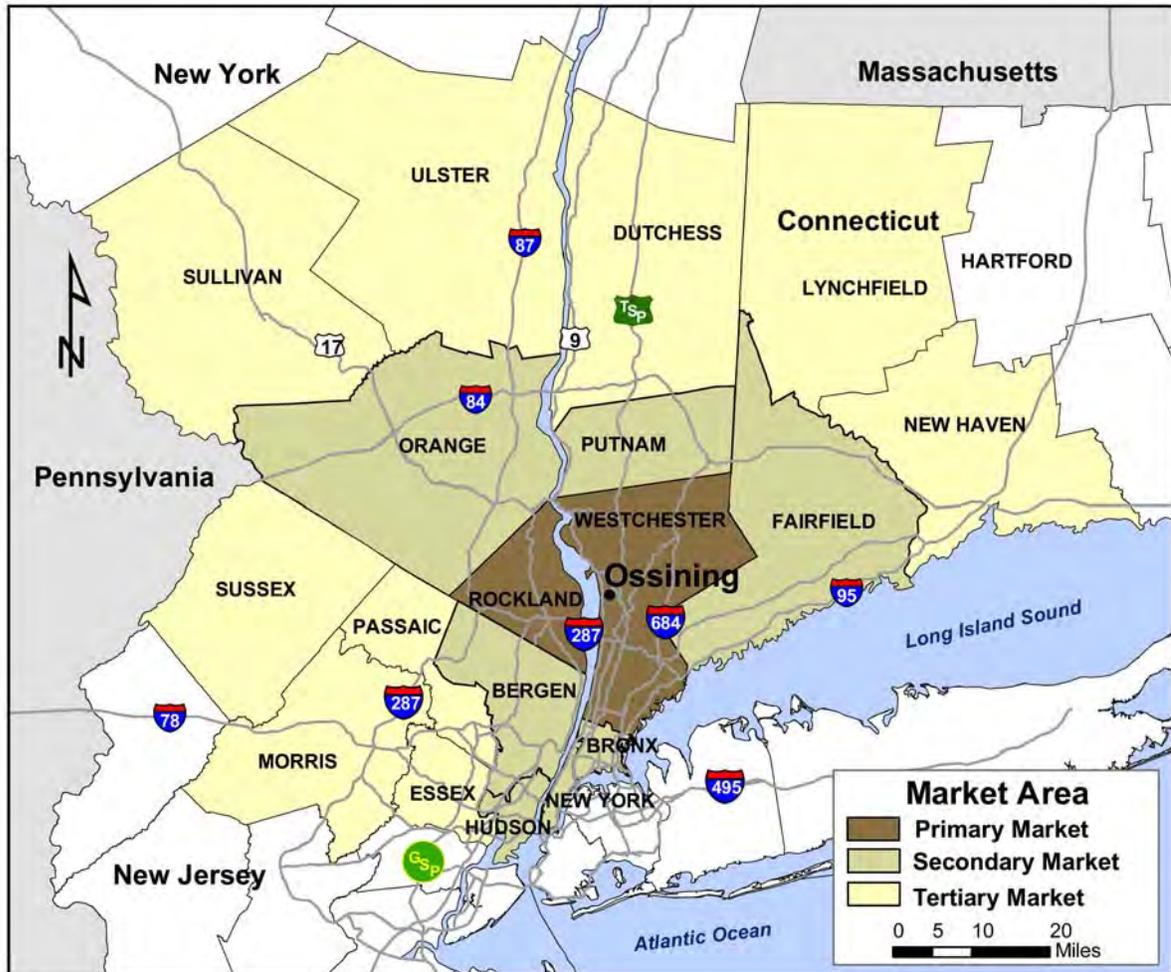
Primary resident markets for historic sites nationwide have been typically found to include area residents traveling up to one hour to visit the attraction. Secondary and tertiary market residents have been found to travel one to two hours to visit these attractions. However, these tend to be the limits of these markets. Most people would expect to have shorter travel times. These travel times also include people on mass transportation. Mass transportation travel times also include time to reach the train or bus from home, and time to get to the destination from the drop-off point or station. These are door-to-door times, and include any localized traffic congestion.

The resident market areas for Sing Sing Historic Prison are defined as:

- **Primary Resident Market.** Westchester and Rockland Counties in New York.
- **Secondary Resident Market.** Bronx, New York, Orange and Putnam Counties in New York; Bergen and Hudson Counties in New Jersey; and Fairfield County in Connecticut.
- **Tertiary Resident Market.** Dutchess, Sullivan and Ulster Counties in New York, Essex, Morris, Passaic and Sussex Counties in New Jersey, and Litchfield and New Haven Counties in Connecticut

Figure II-1 depicts the resident market areas of Sing Sing Historic Prison.

Figure II-1
Resident Market Areas for Sing Sing Historic Prison



Source: ConsultEcon, Inc.

Updated by WCDP 1-07

Population

The resident market population for the Sing Sing Historic Prison is substantial. The primary market has an estimated current year population of 1,215,400. The secondary resident market is the largest resident market, and it is estimated to have a 2001 resident population of 5,712,100. The tertiary resident market has an estimated 2001 population of 3,448,600. In all, the total resident market of the Sing Sing Historic Prison is estimated to be 10,376,100 persons. Detailed current year estimates and year 2006 projections for the counties that comprise the resident market for the Sing Sing Historic Prison are presented in **Table II-1**.

Population Trends

Table II-1 also shows the projected change in population for each county in the resident market area over a five-year period. The primary resident market is projected to grow in population by 2.4%, while the secondary resident market is projected to grow by 1.8%. The tertiary resident market, however, is projected to decline by 0.9% between 2001 and 2006. Overall, the population of the resident market area is projected to grow by 1.6%. Though this projection for the entire resident market is modest, there are a number of counties that are projected to have higher rates of population growth, namely Orange and Putnam Counties in New York and Morris and Sussex Counties in New Jersey. These population trends are summarized at the market area level in **Table II-2**.

Table II-1
Sing Sing Historic prison
Estimated 2001 and Projected 2006 Resident Market Population

Population in Primary Market Area Counties			
	2001	2006	% Change 2001-2006
Westchester, NY	927,100	945,600	2.0%
Rockland, NY	288,300	298,500	3.5%
Total Primary Market Area	1,215,400	1,244,100	2.4%
Population in Secondary Market Area Counties			
	2001	2006	% Change 2001-2006
Bronx, NY	1,342,300	1,340,800	-0.1%
New York, NY	1,540,900	1,584,700	2.8%
Orange, NY	343,900	359,500	4.5%
Putnam, NY	96,600	102,800	6.4%
Bergen, NJ	888,500	908,000	2.2%
Hudson, NJ	613,200	616,100	0.5%
Fairfield, CT	886,700	902,500	1.8%
Total Secondary Market Area	5,712,100	5,814,400	1.8%
Population in Tertiary Market Area Counties			
	2001	2006	% Change 2001-2006
Dutchess, NY	281,700	289,700	2.8%
Sullivan, NY	74,300	75,000	0.9%
Ulster, NY	178,700	180,500	1.0%
Essex, NJ	794,800	776,000	-2.4%
Morris, NJ	473,900	500,700	5.7%
Passaic, NJ	491,700	500,100	1.7%
Sussex, NJ	145,200	152,400	5.0%
Litchfield, CT	183,800	183,500	0.4%
New Haven, CT	825,500	822,200	-0.4%
Total Tertiary Market Area	3,448,600	3,480,100	-0.9%
Total Resident Market Area			
Population	10,376,100	10,538,600	1.6%

Source: Sales and Marketing Management, 2001 Survey of Buying Power.

Table II-2
Sing Sing Historic Prison
Projected Population of Residential Market Area

	2001	Estimated	Percent Change
	Population	2006	2001-2006
	Population	Population	
Primary Resident Market	1,215,400	1,244,100	2.4%
Secondary Resident Market	5,712,100	5,814,400	1.8%
Tertiary Resident Market	3,448,600	3,480,100	-0.9%
Total Resident Market	10,376,100	10,538,600	1.6%

Source: Sales and Marketing Management; *2001 Survey of Buying Power*

Age Profile

Important adult audiences for historical attractions generally include adults in their mid-twenties through forties with children, and adults in their forties through sixties who have more time and disposable income for leisure activities of this type. Data in **Table II-3** provide a profile of the age characteristics of the resident market populations for the Sing Sing Historic Prison.

Table II-3
 Sing Sing Historic Prison
 Estimated 2001 Age Distribution

	Percent to Total					Total
	0 to 17	18 to 24	25 to 34	35 to 49	50+	
Primary Market Area Counties						
Westchester, NY	21.5%	8.1%	13.0%	24.6%	32.8%	100.0%
Rockland, NY	25.6%	8.4%	11.8%	25.4%	28.8%	100.0%
Total Primary Market	22.5%	8.2%	12.7%	24.8%	31.9%	100.0%
Secondary Market Area Counties						
Bronx, NY	27.8%	10.0%	14.0%	21.4%	26.8%	100.0%
New York, NY	16.6%	9.0%	17.1%	26.7%	30.6%	100.0%
Orange, NY	27.7%	9.0%	13.7%	24.8%	24.8%	100.0%
Putnam, NY	25.4%	7.7%	13.5%	28.4%	25.0%	100.0%
Bergen, NJ	20.1%	7.5%	12.8%	24.9%	34.7%	100.0%
Hudson, NJ	22.5%	9.6%	16.1%	22.3%	29.5%	100.0%
Fairfield, CT	22.3%	8.1%	13.3%	25.2%	31.1%	100.0%
Total Secondary Market	22.1%	8.1%	13.3%	25.2%	31.3%	100.0%
Tertiary Market Area Counties						
Dutchess, NY	23.8%	9.7%	14.0%	24.8%	27.7%	100.0%
Sullivan, NY	24.8%	7.6%	12.9%	23.5%	31.2%	100.0%
Ulster, NY	23.2%	9.0%	13.7%	24.8%	29.3%	100.0%
Essex, NJ	24.3%	9.4%	13.8%	23.4%	29.1%	100.0%
Morris, NJ	22.5%	8.0%	13.2%	28.7%	28.5%	100.0%
Passaic, NJ	24.0%	9.7%	13.9%	23.0%	29.4%	100.0%
Sussex, NJ	27.5%	7.0%	14.1%	28.8%	22.6%	100.0%
Litchfield, CT	23.1%	7.2%	13.1%	26.4%	30.3%	100.0%
New Haven, CT	22.6%	9.3%	14.2%	23.5%	30.4%	100.0%
Total Tertiary Market	23.6%	9.0%	13.8%	24.5%	29.1%	100.0%
Total Resident Area Population	22.6%	8.8%	14.2%	24.5%	29.8%	100.0%

Source: Sales and Marketing Management; 2001 Survey of Buying Power

The primary resident market has a slightly larger percentage of residents in the 35 to 49 and 50+ cohorts, while the secondary resident market exhibits younger overall age characteristics. Overall, the age distribution of market area residents is similar to observations for New York State and the State of New Jersey, while showing slightly older characteristics compared to the United States as a whole.

School Age Children

School age children will potentially be an important segment of the market for the Sing Sing Historic Prison. Education is part of the mission of the Sing Sing Historic Prison, and educators may feel that there are many valuable lessons to be learned from such an experience. From an attendance perspective, school groups can provide an important source of visitation. School age children typically visit during the spring, fall and winter, and on weekdays, when other visitor segments are not at their peak. In addition, a positive experience at an attraction such as the Sing Sing Historic Prison can lead to a future visit with family members or community groups. Data in Table II-4 show the estimated number of school children ages 5 through 18 in the resident market areas. IN all, there are an estimated 1.79 million school age children in the region who are within a reasonable distance from the project for school trips.

Table II-4
Sing Sing Historic Prison
Estimated Number of School Age Children in Resident Market Areas

	<u>Estimated Number of School Age Children</u>
Primary Market Area	206,986
Secondary Market Area	964,217
Tertiary Market Area	618,390
Total Resident Market Areas	1,789,593

Source: Sales and Marketing Management; *2001 Survey of Buying Power*.

Household Profile

Currently there are an estimated 435,800 households in the primary market area, 2,244,100 households in the secondary market area and 1,248,800 households in the tertiary market area. The total number of households in the resident market area is estimated to be 3.93 million. Data in Table II-5 detail household size characteristics for the market areas and their individual counties.

The total resident market area has an average household size of 2.64 persons per household. The primary resident market and tertiary resident market have higher average household size, while the secondary resident market has a much lower average household size. This is attributed to residents of New York County (Manhattan), which have an average household size of 2.09. Overall, the average household size for the resident market area counties is lower than the averages for the State of New York and New Jersey, and just slightly lower than the average for the United States as a whole.

Income Profile

Higher incomes are generally associated with visitation to historic attractions such as the Sing Sing Historic Prison, both in terms of the ability to visit (disposable income, transportation and leisure time) and the desire to visit, as higher incomes frequently reflect higher educational attainment. Data in Table II-6 show the 2001 Effective Buying Income (EBI)² for the resident market areas. The average Median EBI for the resident market area counties is \$51,400. The primary resident market is the most affluent of the three, with a median effective buying income of \$62,000. Overall, the resident market areas exhibit relative affluence compared with national averages.

² EBI is defined as money less person income tax and non-tax payments – otherwise referred to as “disposable” or “after-tax” income.

**Table II-5
 Sing Sing Historic Prison
 Resident Market Area Demographic Characteristics**

Primary Market Area Counties	Households	Average Household Size
Westchester, NY	342,200	2.71
Rockland, NY	93,600	3.08
Total Primary Market Area	435,800	2.79
Secondary Market Area Counties		
Bronx, NY	466,900	2.87
New York, NY	737,000	2.09
Orange, NY	114,800	3.00
Putnam, NY	32,500	2.97
Bergen, NJ	334,900	2.65
Hudson, NJ	227,900	2.69
Fairfield, CT	330,100	2.69
Total Secondary Market Area	2,244,100	2.55
Tertiary Market Area Counties		
Dutchess, NY	99,400	2.83
Sullivan, NY	26,600	2.79
Ulster, NY	66,900	2.67
Essex, NJ	282,100	2.82
Morris, NJ	169,700	2.79
Passaic, NJ	166,900	2.95
Sussex, NJ	49,800	2.92
Litchfield, CT	70,800	2.58
New Haven, CT	316,600	2.61
Total Tertiary Market Area	1,248,800	2.76
Total Resident Market Areas	3,928,700	2.64
New York	7,042,700	2.70
New Jersey	3,073,500	2.75
United States	106,206,000	2.67

Source: Sales and Marketing Management; 2001 Survey of Buying Power.

**Table II-6
 Sing Sing Historic Prison
 Estimated 2000 Median Household Disposable Income³**

	Median EBI
Primary Market Area Counties	
Westchester, NY	\$62,511
Rockland, NY	\$60,147
Total Primary Market Area	\$62,003
Secondary Market Area Counties	
Bronx, NY	\$26,123
New York, NY	\$52,165
Orange, NY	\$46,327
Putnam, NY	\$63,257
Bergen, NJ	\$60,003
Hudson, NJ	\$40,481
Fairfield, CT	\$75,312
Total Secondary Market Area	\$49,997
Tertiary Market Area Counties	
Dutchess, NY	\$50,001
Sullivan, NY	\$33,006
Ulster, NY	\$36,345
Essex, NJ	\$45,221
Morris, NJ	\$71,523
Passaic, NJ	\$43,359
Sussex, NJ	\$61,478
Litchfield, CT	\$53,128
New Haven, CT	\$49,222
Total Tertiary Market Area	\$50,302
Total Resident Market Areas	\$51,426

Source: Sales and Marketing Management; *2001 Survey of Buying Power*.

³ Measured as “Effective Buying Income” personal income tax less personal tax and non-tax payments (disposable income).

Data in Table II-7 compare the income ranges of the resident market areas to the States of New York and New Jersey and the United States as a whole. The small primary market is quite affluent, while the much larger secondary market has a fair percentage of lower income cohorts to go along with a substantial high-income cohort. In comparison to the United States as a whole, the resident market areas are on the whole more affluent, with a much higher percentage of residents in the highest income cohorts and fewer residents in the lower-middle to lower income cohort groups. In all, the income profile of the resident market areas is a positive indicator for visitation to Sing Sing Historic Prison.

Table II-7
Sing Sing Historic Prison
Estimated Median Household Disposable Income

	Less than \$20,000	\$20,000- \$34,999	\$35,000- \$49,000	\$50,000+
Primary Market Area	14.0%	12.5%	12.7%	60.7%
Secondary Market Area	23.1%	15.3%	13.5%	48.2%
Tertiary Market Area	18.4%	16.1%	15.5%	50.0%
Average of all Market Areas	20.6%	15.2%	14.0%	50.1%
New York	24.5%	19.1%	15.8%	40.6%
New Jersey	17.0%	15.6%	15.1%	52.3%
United States	24.3%	20.7%	16.8%	38.2%

Source: Sales and Marketing Management; *2001 Survey of Buying Power*.

Demographic Summary

The total current resident market population is estimated at 10,357,100. The projected population of the resident market area in 2006 is an estimated 10,538,600 residents, an increase of 1.6%. There are an estimated 1.79 million school age children in the region who are within a reasonable distance from the project for school trips. The quality of Sing Sing Historic Prison as an educational institution will draw those interested in history, architecture and culture to the Sing Sing Historic Prison. There are currently an estimated 3.9 million households in the resident market area. The total resident market area has an average household size of 2.64, a slightly lower average than New York State, which has an average household size of 2.70. Higher incomes are generally associated with visitation to attractions such as Sing Sing Historic prison, both in terms of the ability to visit (disposable income, transportation and leisure time) and the desire to visit, as higher incomes frequently reflect higher educational attainment. In comparison to the United States as a whole, the resident market areas are on the whole more affluent, with a much higher percentage of residents in the highest income cohorts and fewer residents in the lower-middle to lower income cohort groups. IN all, the demographic profile of the resident market areas is a positive indicator for visitation to the Sing Sing Historic Prison.

Section III VISITOR MARKET EVALUATION

This section of the report reviews the visitor or tourist⁴ markets available to the Sing Sing Historic Prison. The available data on tourism in New York State, the Hudson Valley Region and Westchester County utilized for this report are derived from several sources utilizing the latest available data from these sources. When reviewing the various indicators of tourist activity available, care has been used to avoid double counting of visitors, or of including the activities of the local population as tourist activity.

Tourism in New York State

New York State is a large, diverse and popular destination for tourism. The New York State Office of Parks, Recreation and Historic Preservation reports that tourism is the State's second largest industry.

A report by D.K. Shifflet & Associates for Empire State Development estimated that 92.8 million person-trips⁵ were made to New York State (less New York City) in 2000 (tourism to New York City is addressed later in this section). This was a 4.7% decrease in the number of person-trips to the State from 1999 when an estimated 97.4 million person-trips were made. The number of person-trips in New York State has fluctuated over the years. The number of day trips decreased by nearly 11% in 2000, while overnight trips increased by nearly 5%. Of those person-trips made in 2000, approximately 56% were day trips and approximately 44% were overnight trips. Data in Table III-1 show the number of person-trips by day trips and overnight trips to New York State (less New York City) from 1996 to 2000.

⁴ The term visitor and tourist are used interchangeably.

⁵ D.K. Shifflet defines a "person-trip" for which one person accounts for one trip irrespective of trip length.

Table III-1
New York State (less New York City) Person-Trips
Day and Overnight Trips
1996-2000

	1996	1997	1998	1999	2000
Number of Person-Trips					
Day Trips	46,900,000	49,800,000	48,100,000	58,800,000	52,400,000
Overnight Trips	37,000,000	37,200,000	36,200,000	38,600,000	40,400,000
Total	83,900,000	87,000,000	84,300,000	97,300,000	92,800,000
Percent Change from Previous Year					
Day Trips	-	6.2%	-3.4%	22.2%	-10.9%
Overnight Trips	-	0.5%	-2.7%	6.6%	4.7%
Total	-	3.7%	-3.1%	15.5%	-4.7%
Percent to Total					
Day Trips	56%	57%	57%	60%	56%
Overnight Trips	44%	43%	43%	40%	44%
Total	100%	100%	100%	100%	100%

Source: Empire State Development, Division of Policy and Research – Seasonal Visitor Volume Estimates, D.K. Shifflet and Associates, Ltd.

Business and Leisure Travel to New York State

Business travel to New York State (less New York City) increased slightly between 1999 and 2000, from an estimated 23.1 million person-trips to an estimated 23.3 million person-trips. Overall, the number of person-trips for

business to New York State (less New York City) has increased over the years. Approximately 25% of person-trips made to New York State (less New York City) in 2000 were for business.

Leisure travel to New York State (less New York City) decreased to 6.7 percent in 2000. IN 1999, over 74 million person-trips were made for leisure, compared to the 69.3 million person-trips made in 2000. Leisure person-trips still define the majority of person-trips to New York State (less New York City), with an estimated 75% of travel in 2000.

Data in Table III-2 show the number of business and leisure person-trips to New York State (less New York City) between 1996 and 2000. Although the number of person-trips decreased between 1999 and 2000, the overall trend shows a growing number of person-trips.

Table III-2
 New York State (Less New York City) Person-Trips
 Business and Leisure
 1996-2000

	1996	1997	1998	1999	2000
Number of Person-Trips					
Business	20,800,000	22,700,000	20,500,000	23,100,000	23,300,000
Leisure	63,100,000	64,300,000	63,700,000	74,300,000	69,300,000
Total	83,900,000	87,000,000	84,200,000	97,400,000	92,600,000
Percent Change from Previous Year					
Business	-	9.1%	-9.7%	12.7%	0.9%
Leisure	-	1.9%	-0.9%	16.6%	-6.7%
Total	-	3.7%	-3.2%	15.7%	-4.9%
Percent to Total					
Business	25%	26%	24%	24%	25%
Leisure	75%	74%	76%	76%	75%
Total	100%	100%	100%	100%	100%

Source: Empire State Development, Division of Policy and Research – Seasonal Visitor Volume Estimates, D.K. Shifflet and Associates, Ltd.

Travel Party Characteristics

Overall, visitors to New York tended to travel by themselves or with their family. In 1999, an estimated 34% of travelers to New York State (less New York City) traveled alone while an estimated 32% traveled with their families. Approximately one-third of day-trip and overnight visitors were traveling with their families and slightly more – about 35% of overnight visitors – traveled alone. The average number of persons on a trip to New York State (less New York City) was 2.3 in 1999. Data in Table III-3 show the party size of travelers to New York State (less New York City) by person-days.⁶

Table III-3
 Travel Party Size
 New York State (less New York City), 1999

Travel Party Size	Day-Trip Visitors	Overnight Visitors	Total Visitors
One Adult	29.9%	34.7%	33.7%
Couples (M/F)	23.7%	25.4%	25.0%
Two Males or Two Females	6.4%	4.1%	4.6%
Three or More Adults	7.2%	4.5%	5.1%
Families	32.8%	31.3%	31.6%
Average Travel Party Size	2.5	2.3	2.3

Source: Empire State Development, Division of Policy and Research, D.K. Shifflet and Associates, Ltd.

⁶ D.K. Shifflet defines “person-days” as the length of a visitor’s stay. Thus, person-days capture the difference in travel duration between travelers. Since each person generates a different number of travel days, person-days are the most realistic assessment of the travel market.

Length of Stay

The average length of stay for a visitor to New York State (less New York City) is 2.1 days. The majority (60%) of visitors to New York State (less New York City) are day-trip visitors. Of the travelers who are overnight visitors, most stay between one and three nights. The average length of stay for an overnight traveler to New York State (less New York City) is 4.1 days. Data in Table III-4 show the average length of stay of visitors to New York State (less New York City) in 1999.

Table III-4
 Length of Stay, Person-Days
 New York State (Less New York City), 1999

Length of Stay	Day-Trip Visitors	Overnight Visitors	Total Visitors
Day-Trip	100%		59.8%
1-3 nights		72.3%	29.1%
4-7 nights		20.3%	8.1%
8+ nights		7.4%	3.0%
Average (days)	0.8	4.1	2.1

Source: Empire State Development, Division of Policy and Research, D.K. Shifflet and Associates, Ltd.

Income Characteristics

The average household income of travelers to New York State (less New York City) is \$57,500. Day-trip visitors to New York State (less New York City) have slightly higher household incomes than overnight visitors. More than half of all travelers to New York State have household incomes of \$50,000 and over. Table III-5 show the range of household incomes of travelers to New York State (less New York City) in 1999.

Table III-5
Household Income
New York State (less New York City), 1999

Income Category	Day-Trip Visitors	Overnight Visitors	Total Visitors
Under \$25,000	17.6%	17.0%	17.1%
\$25,000-\$49,000	29.1%	29.8%	29.7%
\$50,000-\$74,999	29.6%	26.5%	27.1%
Over \$75,000	23.6%	26.7%	26.1%
Average Household Income	\$57,400	\$56,700	\$57,500

Source: Empire State Development, Division of Policy and Research, D.K. Shifflet and Associates, Ltd.

Origin of Visitors

The top origin states of visitors to New York State include New York, Florida and Pennsylvania. Other top origin states include New Jersey, Virginia, Massachusetts and North Carolina. Almost half of the total visitors to New York State (less New York City) are from New York State. Data in Table III-6 show the top origin states of travelers to New York State (less New York City).

Table III-6
 Top Origin States
 New York State (less New York City), 1999

	Day-Trip Visitors	Overnight Visitors	Total Visitors
New York	78.5%	41.3%	49.3%
Florida	2.0%	7.7%	6.5%
Pennsylvania	4.7%	6.2%	5.9%
Virginia	0.1%	4.3%	3.4%
New Jersey	4.7%	4.3%	4.3%
Massachusetts	1.1%	4.1%	3.5%
North Carolina	0.3%	4.4%	3.5%
Connecticut	1.7%	2.6%	2.4%
California	0.3%	1.8%	1.5%
Ohio	0.8%	3.6%	3.0%
Texas	0.4%	2.2%	1.8%
Maryland	0.2%	1.7%	1.4%

Source: Empire State Development, Division of Policy and Research, D.K. Shifflet and Associates, Ltd.

New York State Visitor Spending

Domestic travel expenditures grew from \$18.81 billion in 1995 to an estimated \$26.39 billion in 1999, an increase of 41%. Hotel and motel occupancy rates have increased since 1995, when an occupancy rate of 68% was reported. In 1999, a 73% occupancy rate was reported, a 7% increase over 1995 levels. These data reflect strong growth in the New York tourism economy.

Data in Table III-7 provide the average daily expenditures of leisure travelers in New York State and non-metro New York State (less New York City) in 1999. These data reflect strong travel spending patterns in New York State. This strong spending pattern is reflective of the types of visitors that New York's cultural and tourism offerings attract.

Table III-7
Average Daily Expenditures of Leisure Travelers⁷
in New York State and Non-metro New York State, 1999
(per person daily)

Type of Expenditure	New York State, Leisure				New York State Less NYC, Leisure		
	All trips	Total	Overnight Trips	Day trips	Total	Overnight Trips	Day trips
Transportation	\$25.00	\$20.00	\$19.10	\$23.20	\$17.10	\$16.20	\$19.70
Food	\$21.10	\$19.80	\$19.10	\$22.20	\$17.70	\$16.70	\$20.90
Lodging ⁸	\$17.60	\$11.40	\$14.80	-	\$9.60	\$12.50	-
Shopping	\$17.70	\$18.80	\$15.30	\$30.80	\$17.10	\$13.20	\$28.70
Entertainment	\$14.10	\$14.90	\$13.60	\$19.10	\$12.40	\$11.00	\$17.00
Miscellaneous	\$5.40	\$4.80	\$4.60	\$5.60	\$4.30	\$4.30	\$4.40
Total	\$100.00	\$89.70	\$86.50	\$100.90	\$78.20	\$73.90	\$90.70
Average Room Rate Paid ⁹	\$92.20	\$87.10	\$87.10	-	\$74.30	\$74.30	-

Source: D.K. Shifflet & Associates Ltd., New York State Seasonal Year End 1999 Domestic Travel Report (May 2000)

Note: day trips include one-way travel of 50 miles or more away from home

H VALLEY TOURISM

While the Sing Sing Historic Prison generally will seek visitors to New York State, including New York City, travelers to the H Valley will provide the best marketing prospects. Visitors to the H Valley typically tour a number

⁷ Includes US residents on trips to places in New York State that included either an overnight stay, or travel to places 50 miles or more away from home.

⁸ Includes travelers reporting no expenditures for lodging (i.e., \$0.00)

⁹ Includes travelers reporting lodging expenditures of \$1.00 or more

of destinations within the region rather than stick to a particular location. The H Valley is rich in tourism assets, starting with the H itself and the magnificent landscapes bordering it and nearby. There are also picturesque settlements on its banks as well as rural farms and quaint villages. The strategic location of the H has given rise to many important historical events and sites that interpret the history of the region. The H Valley has also shaped important commercial enterprises, cultural traditions and institutions. These natural and historic assets are an important basis for an active and growing tourism industry.

The most recent comprehensive estimate of tourism activity in the H Valley¹⁰ was made in the 1995 report, *H Valley Tourism Strategy*.¹¹ This report provides estimates of 4 to 5 million overnight hotel visitors to the H Valley, and an estimated 3 million people visiting friends and relatives. These are broad estimates based on the number of accommodations, and estimates of occupancy and visitor characteristics. While this evaluation is now several years old, this study's results are important in indicating the substantial tourism activity that is a major feature of the H Valley. It should be noted that some of the travelers within the H Valley are residents of the area who are on day or overnight trips in the region. The data available do not allow direct estimates of "non-local" visitation. As noted, a substantial portion of the travel to the H Valley is from the surrounding urbanized areas for day trips and getaway weekends. Thus, some visitor prospects are included in both the resident and travel markets. It is important in evaluating attendance potential to reflect the travel patterns of local residents. However, the established travel pattern to the H Valley and to Westchester County will continue to be an extremely important factor in marketing the Sing Sing Historic Prison. This local and longer-distance travel pattern will be reflected in the results of the final report.

H Valley Tourism Assets

The report, *H Valley Regional Tourism Strategy*, provides an inventory of visitor attractions in the Valley. The report cites:

"...A broad range of visitor attractions that range from State Parks for camping and boating to historical museums and districts to wineries to river cruises. The area is rich in history, much of it based on the historical significance of the H."¹²

¹⁰ Defined to include Albany, Columbia, Dutchess, Greene, Orange, Putnam, Rensselaer, Rockland, Ulster and Westchester Counties.

¹¹ Prepared by QL Consulting and the Office of Thomas J. Martin, 1995.

¹² QL Consulting and Office of Thomas J. Martin, *H Valley Tourism Strategy*, 1995, p.A-3.

The report identifies a number of places to recreate, discover and enjoy the resources of the area. Following are highlights of the inventory of visitor attractions in the H Valley.

- History is the main theme for the Valley. There are 50 varied historic sites in the 10-county area, with most smaller and/or seasonal in nature, but several that are major sites with 75,000 to over 170,000 visitors annually.
- Four Urban Cultural Parks (UCPs) are located in the area.
- There are 31 lakes and parks.
- There are at least 20 wineries in the region.
- Shopping is perennially a favorite leisure and travel activity. The H Valley offers a variety of retail offerings ranging from malls and outlets to specialty shops of special interest to travelers.

The Bureau of Economic Research at the School of Management at Marist College conducted a study called the *Impact of Visitors to Historic Site in the H Valley: A Marist Greenway Survey of Visitors* in 1997. The study, sponsored by the H Valley Greenway Council, surveyed visitors to historic sites in the H Valley in the fall of 1995 and summer of 1996. Regional visitors, day-trip visitors and overnight visitors each defined one-third of the persons interviewed for the study. The report defines a regional visitor as one who resides in Albany, Columbia, Dutchess, Greene, Orange, Putnam, Rensselaer, Rockland, Ulster or Westchester Counties; day-trip visitors are visitors from outside the region who are visiting for the day; and overnight visitors are from outside the region staying one or more nights.

According to the study, over half of the visitors who were interviewed at the historic sites are over the age of 50. Data in Table III-8 show the age range of visitors and the breakdown of age by category.

Table III-8
 Age Range of Visitors Surveyed
 H Valley Tourism Strategy Study

	Regional Visitors	Day-Trip Visitors	Overnight Visitors	Total Visitors
<i>Age</i>				
Under 25	6%	3%	3%	4%
25-50	53%	41%	43%	46%
Over 50	42%	56%	54%	51%
Total	100%	100%	100%	100%
<i>Breakdown of Age by Category</i>				
Adults	63%	75%	72%	71%
Teens	3%	3%	2%	3%
Children	16%	6%	8%	9%
Seniors	17%	16%	18%	17%
Total	100%	100%	100%	100%

Source: *Impact of Visitors to Historic Site in the H Valley: A Marist-Greenway Survey of Visitors*, Bureau of Economic Research, School of Management, Marist College.

When asked to define their party composition, 51% of the travelers stated they were a party with adults only. Overnight visitors and day-trip visitors had a higher percentage of parties made up of adults only compared to regional visitors. Nearly 30% of regional visitors were made up of parties with children. Day-trip and overnight visitors reported half as many parties with children. Data in Table III-9 show the party composition of visitors profiled in the Marist study.

Table III-9
 Party Composition of Visitors Surveyed
 H Valley Tourism Strategy Study

	Regional Visitors	Day-Trip Visitors	Overnight Visitors	Total Visitors
<i>Party Composition</i>				
Parties with Children	28%	16%	16%	20%
Parties with Seniors Over 65	10%	8%	10%	9%
Single Adults Under 65	9%	7%	7%	8%
Parties with Adults Only	41%	55%	56%	12%
Parties with Seniors Only	11%	14%	11%	100%
Total	100%	100%	100%	100%

Source: *Impact of Visitors to Historic Sites in the H Valley: A Marist-Greenway Survey of Visitors*, Bureau of Economic Research, School of Management, Marist College.

Visitors tended to be fairly wealthy, and this was common among all travel party types. The greatest percentage of visitors reported incomes of between \$50,000 and \$74,999. Of all visitors, 6 in 10 report household incomes of \$50,000 or more. Table III-10 shows the range of household incomes for visitors to the H Valley.

Table III-10
 Total Household Income by Visitor Type
 H Valley Tourism Strategy Study

	Regional Visitors	Day-Trip Visitors	Overnight Visitors	Total Visitors
<i>Total Household Income</i>				
Under \$10,000	4%	3%	1%	3%
\$10,000-\$24,999	11%	11%	6%	9%
\$25,000-\$49,999	25%	24%	27%	25%
\$50,000-\$74,999	26%	26%	29%	27%
\$75,000-\$124,999	22%	21%	23%	22%
Over \$125,000	12%	14%	14%	13%
Total	100%	100%	100%	100%

Source: *Impact of Visitors to Historic Sites in the H Valley: A Marist-Greenway Survey of Visitors*, Bureau of Economic Research, School of Management Marist College.

Over half of the visitors surveyed in the study report having a college degree or a graduate degree. In fact, more than 3 in 10 visitors have a graduate degree. Data in Table III-11 show the education characteristics of visitors to the H Valley.

Table III-11
 Education Characteristics of Visitors Surveyed
 H Valley Tourism Strategy Study

	Regional Visitors	Day-Trip Visitors	Overnight Visitors	Total Visitors
<i>Education</i>				
High School	17%	12%	14%	15%
Some College	25%	24%	21%	23%
College Degree	34%	27%	27%	26%
Graduate Degree	34%	37%	38%	36%
Total	100%	100%	100%	100%

Source: *Impact of Visitors to Historic Sites in the H Valley: A Marist-Greenway Survey of Visitors*, Bureau of Economic Research, School of Management, Marist College.

Approximately 31% of visitors surveyed came from New York State, and 14% of total visitors were from New York City. An estimated 25% of the visitors were from Mid-Atlantic States and 28% were from the remainder of the United States. The H Valley receives visitors from all regions of the United States. Data in Table III-12 show visitor origin in the historic sites in the H Valley for the Marist study.

Table III-12
 Visitor Origin
 H Valley Tourism Strategy Study

<i>Visitor Origin</i>	Day-Trip Visitors	Overnight Visitors	Total Visitors
New York City	22%	7%	14%
New York State ¹³	17%	18%	17%
Northeastern States ¹⁴	16%	9%	12%
Mid-Atlantic States	27%	23%	25%
Remainder of U.S.	16%	39%	28%
Countries Outside U.S.	2%	5%	4%
Total	100%	100%	100%

Source: *Impact of Visitors to Historic Sites in the H Valley: A Marist-Greenway Survey of Visitors*. Bureau of Economic Research, School of Management, Marist College.

Most visitors reported being on a family vacation when they were profiled for the Marist study. An estimated 43% of total visitors were on vacation and an estimated 34% of total visitors were on a day trip or a family outing. Regional and day-trip visitors were more likely to be on a day-trip or family outing than overnight visitors. The majority of overnight visitors reported being on a family vacation. Data in Table III-13 summarizes the trip purpose of regional day-trip and overnight visitors.

¹³ Less New York City

¹⁴ Less New York State

Table III-13
 Trip Purpose
 H Valley Tourism Strategy Study

	Regional Visitors	Day-Trip Visitors	Overnight Visitors	Total Visitors
Family Vacation	40%	35%	54%	43%
Day Trip/Family Outing	48%	41%	13%	34%
Part of Organized Tour	4%	9%	7%	7%
Passing Through to Other Destination	2%	5%	6%	4%
Business Trip or Convention	0%	2%	5%	2%
Other	6%	8%	14%	10%
Total	100%	100%	100%	100%

Source: *Impact of Visitors to Historic Sites in the H Valley: A Marist-Greenway Survey of Visitors*, Bureau of Economic Research, School of Management, Marist College.

Data in Table III-14 reports spending by visitors to historic sites in the H Valley by type of visitor and by expense, location and duration. Care must be taken in using this data as some of the individual items are based on small sample sizes, and each data point (with the exception total spending) is an average of those who spent in that category rather than a weighted average of all respondents. As such, the sum of the average expenditure within the spending categories is more than the total expenditures reported across the group. Nonetheless, the weighted average of all visitor types shows the higher expenditure level reported for overnight visitors, which would be expected given their longer duration in the region and the use of paid accommodations.

Table III-14
 Mean Daily Expenditures by Type of Visitor
 H Valley Tourism Strategy Study

Expenditure Type	Mean Daily Visitor Expenditures			
	Regional Visitors	Day-Trip Visitors	Oversight Visitors	Total Visitors
Expense at Site	\$18.72	\$27.60	\$26.79	\$24.31
Daily Expense	\$48.89	\$54.60	\$106.70	\$67.97
Total Visit Expense	NA	NA	\$418.47	\$418.47

Source: *Marist-Greenway Survey of Historic Sites*, 1997, Bureau of Economic Research School of Management, Marist College.

Tourism in Westchester County

Westchester County is a popular destination for historical and cultural sites, countryside mansions, antiques and wineries, and outdoor recreation. For residents of the New York City metropolitan area, Westchester County is the gateway to the H Valley. Westchester County is also the home of numerous large corporations and has considerable amounts of business travelers. The available inventory of popular attractions, the County's proximity to large population centers, and the volume of business travel contribute to a large and growing hospitality and tourism industry in Westchester County. Table III-15 shows the comparative spending levels of visitors to H Valley Counties for 1997, the most recent year for which data is available.

Table III-15
 Estimated Visitor Spending in the Hudson Valley Region by County in 1997
 (in millions of dollars)

Hudson River Valley County	Hotel	Transportation	Food/Dining	Shopping	Entertainment	Misc.	Total Spending
Albany	\$91.65	\$47.16	\$114.09	\$86.17	\$61.32	\$29.77	\$430.16
Columbia	2.05	1.05	2.55	1.93	1.37	0.67	9.62
Dutchess	27.51	14.15	34.24	25.86	18.40	8.93	129.11
Greene	21.99	11.31	27.37	20.67	14.71	7.14	103.19
Orange	26.50	13.63	32.98	24.91	17.73	8.61	124.36
Putnam	1.91	0.98	2.38	1.79	1.28	0.62	8.95
Rensselaer	4.00	2.06	4.97	3.76	2.67	1.30	18.75
Rockland	31.18	16.04	38.81	29.31	20.86	10.12	146.32
Ulster	58.63	30.17	72.99	55.12	39.23	19.04	275.19
<i>Westchester</i>	<i>173.43</i>	<i>89.24</i>	<i>215.89</i>	<i>163.04</i>	<i>116.02</i>	<i>56.32</i>	<i>813.94</i>
Total Spending	\$438.84	\$225.81	\$546.28	\$412.56	\$293.57	\$142.52	\$2,059.57

Source: D.K. Shifflet and Associates and the New York State Department of Economic Development, 1997.

The above table shows that visitor spending in Westchester County in 1997 was approximately \$814 million, which is the most of all Hudson River Valley counties and was approximately 39.5% of all spending in the Hudson River Valley Region as a whole. Since that time, spending by visitors to Westchester County has continued to grow. In 2000, the Westchester County Office of Tourism¹⁵ reported total visitor spending has reached more than \$1.7 billion. In all, tourism and visitor services employ approximately 31,000 persons in Westchester County with a total industry payroll of almost \$650 million.

Hotel growth – often a significant indicator of the state of visitation and tourism to a region – continues to be strong in Westchester County. IN 2000, two new hotels opened in the county adding 220 more guest rooms to the county's inventory, which now numbers more than 4,000 rooms. Taxable hotel sales have continued to climb to an all-time high of almost \$249 million in 1999-2000. Taxable room sales have grown almost 300% between 1991-1992 and 1999-2000.

¹⁵ Spending data for Westchester County is drawn from the Westchester County Office of Tourism's 2000 Annual Report. The Westchester Office of Tourism is now the name of what formerly was the Westchester Convention and Visitors Bureau.

The establishment of the Westchester County Office of Tourism out of the former Convention and Visitors Bureau in late 2000 signifies the County's commitment to tourism as a component of its overall economic development strategy. Among the goals of the new organization is to focus on marketing the attractions in Westchester County with the hope of increasing the number of regional visitors and boost weekend hotel occupancy rates. A full-fledged marketing campaign has also helped to support the major tourist attractions and cultural facilities in Westchester County, which are collectively marketing themselves as the "Seven Wonders of Westchester"¹⁶ with the aid of a \$100,000 grant from AT&T. Sustained brand awareness and marketing programs of County attractions should help bolster visitation to currently operating and planned visitor attractions.

Visitor Summary

The New York State Office of Parks, Recreation and Historic Preservation reports that tourism is the State's second largest industry. New York State ranked fourth in domestic travel expenditures in the United States in 1998 compared to the United States as a whole. An estimated 92.8 million person-trips¹⁷ were made to New York State (less New York City) in 2000. Of those person-trips made in 2000, approximately 56% were day trips and approximately 44% were overnight trips. Leisure travel to New York State (less New York City) decreased 6.7% in 2000. In 1999, over 74 million person-trips were made for leisure, compared to the 69.3 million person-trips made in 2000. Leisure person-trips still define the majority of person-trips to New York State (less New York City), with an estimated 75% of travel in 2000. Domestic travel expenditures grew from \$18.71 billion in 1995 to an estimated \$26.39 billion in 1999, an increase of 41%.

The *Hudson River Valley Tourism Strategy* reports an estimate 4 to 5 million overnight hotel visitors to the Hudson River Valley, and an estimated 3 million people visiting friends and relatives. These are broad estimates based on the number of accommodations, and estimates of occupancy and visitor characteristics. The study, *Impact of Visitors to Historic Sites in the Hudson River Valley: A Marist-Greenway Survey of Visitors*, states that over half of the visitors who were interviewed at the historic sites are over the age of 50. Overnight visitors and day-trip visitors had a higher percentage of parties made up of adults only compared to regional visitors. Nearly 30% of regional visitors were made up of parties with children. Most visitors in the Marist Study had total household incomes between \$50,000 and \$74,999. Over half of the visitors surveyed in the study report having a college degree or a graduate degree.

Approximately 31% of visitors surveyed came from New York State. Only 14% of total visitors were from New York City. The Hudson River Valley receives visitors from all regions of the United States. Most visitors reported being on a family vacation when they were profiled for the Marist study. Regional and day-trip visitors were more

¹⁶ The Seven Wonders of Westchester include the Neuberger Museum, the Caramoor Center for the Arts, Historic Hudson Valley, the Hudson River Museum, the Katonah Museum of Art, Lyndhurst, and the Performing Arts Center at Purchase College.

¹⁷ D.K. Shifflet defines a "person-trip" for which one person accounts for one trip irrespective of trip length.

likely to be on a day-trip or family outing than overnight visitors. The majority of overnight visitors reported being on a family vacation.

Westchester County is a popular destination for historical and cultural sites, countryside mansions, antiques and wineries, and outdoor recreation. Westchester County is heavily visited due to its array of visitor attractions, its proximity to major population centers, and the high number of corporations located in the county, which results in a high volume of business and meetings / convention visitation. Visitor spending in Westchester County is the highest of all counties in the Hudson River Valley, and it accounts for almost 40% of all visitor spending in the region. Tourism is a very important component of the County's economy, and the establishment of a County Office of Tourism attests to the importance of visitors to the county in generating revenue for the County and providing employment for its residents.

In all, the Hudson River Valley is an active tourism destination attracting millions of visitors annually. While much of the tourism activity is regional in nature, travelers from further distances on trips of longer duration comprise an important segment of visitors. The existing regional tourism activity and local level indicators and initiatives provide a strong base of market support for the Sing Sing Historic Prison, which is well suited to capitalize on the available visitor markets.

Experience of Local Attractions

The Hudson River Valley Region is a popular visitor destination in the United States. Approximately 7 to 8 million visitors visited the Hudson River Valley in 1995, the most recent year for which estimates of visitation to the region are available. Of these visitors, 3 million were visiting friends and relatives, while 4 to 5 million were overnight hotel visitors to the Hudson River Valley. The Hudson River Valley offers numerous and varied attractions that draw both residents and tourists. Numerous historical events have taken place in the region and several sites are preserved and open to the public. Data in Table III-16 provides annual attendance, admission costs and a brief description of popular Hudson River Valley attractions, listed by attendance, with the exception of the individual attractions operated by Historic Hudson Valley, which are located together at the bottom of the table.

Within the Hudson River Valley Region, there are several historical sites that attract visitors from around the Northeast and United States. The New York State Museum in Albany, the State's capitol, is the historic attraction with the highest attendance with 650,000 visitors in 1999. Other historic attractions in the region with high attendance include Vanderbilt Mansion National Historic Site in Hyde Park, which had an estimated 383,000 visitors, the West Point Museum at West Point, with an estimated 160,000 visitors, and the Home of Franklin D. Roosevelt National Historic Site in Hyde Park, which also had an estimated attendance of 160,000.

Regional attractions include historical sites such as the homes of former Presidents, military headquarters and persons involved in the Revolutionary war, as well as art museums, maritime museums and nature preserves. Estimated attendance in 1999 at the profiled attractions ranged from 650,000 at the New York State Museum to

2,000 at the Thomas Cole National Historic Site at Catskill. Adult admission costs range from no charge at the West Point Museum to \$20 at Kykuit, the Rockefeller House and Gardens.

Table III-16
 Regional Attractions
 Sing Sing Historic Prison

Name and Location	Attendance	Admission	Description
Rye Playland, Rye	1.1 million*	Free to enter, pay-as-you go pricing for rides.	Rye Playland, in operation since 1928, is a 279-acre amusement park owned and operated by Westchester County. Playland, which was designated as a National Historic Landmark in 1987, features over 50 rides, and arcade, a boardwalk and beach, mini golf, and lakefront boating and kayaking.
New York State Museum, Albany	650,000	No charge. Donations suggested.	Open since 1836. Collection of New York State's natural and human history. More than 5 million specimens and artifacts. Currently closed to the public for renovation. Scheduled to open in November 2001.
Vanderbilt Mansion National Historic Site, Hyde Park	383,038	Adults: \$8.00 Children (16 and under): Free	Furnished home of Frederick Vanderbilt. Visitor Center with exhibits and bookstore. Gardens, trails and walkways. Entrance to the park grounds and gardens is free. Open May-October.
West Point Museum, West Point	160,000	No charge.	Military history of West Point and the United States Military Academy, the evolution of warfare, and the development of the American Armed Forces. Open year-round.
Home of Franklin D. Roosevelt National Historic Site, Hyde Park	159,500	Adults: \$10.00 Children (16 and under): Free	Furnished Home of Roosevelt, Springwood, Rose Garden and Gravesite, Ice House and Stables, maintained and operated by the National Park Service. Visits to the Home are by guided tour only. Presidential Museum and Library maintained and operated by the National Archives and Records Administration. Entrance to the park grounds and gardens is free of charge.

--	--	--	--

Clermont State Historic Site, Clermont	110,000*	Adults: \$3.00 Children (5-12): \$1.00 Seniors: \$2.00	Former home of the Livingston family. Designated a National Historic Landmark in 1973. Offers audio-visual programs, tours, visitor center and museum, gift shop and picnic area. Entrance to the park grounds and gardens is free. Open April-October.
Albany Institute of History & Art, Albany	90,000*	Adults: \$5.00 Children (6-12): \$2.50 Seniors & Students: \$4.00	Collects, preserves, interprets and promotes the history, art and culture of Albany and the Upper Hudson Valley Region. Closed to the public for renovation and construction. Scheduled to reopen July 2001.
John Jay Homestead State Historic Site Katonah	84,294	Adults: \$3.00 Children (5-12): \$1.00 Seniors: \$2.00	Educational programming, audio-visual programs, tours, guided and self-guided tours. Gardens, picnic area and gift shop. Entrance to the park grounds and gardens is free. Home is open April-October.
Lyndhurst, Tarrytown	80,000	Adults: \$10.00 Children (12-17): \$4.00 Seniors: \$9.00 Grounds fee: \$4.00	A National Trust Historic Site. Guided and self-guided tours of the mansion and grounds available. Gift shop and café on-site. Open year-round.
Caramoor Center for Music & The Arts, Inc. Katonah	62,000	Adults: \$10.00 Children (16 & under): Free	Collection of Renaissance and Eastern Art. House and gardens on-site. Guided tours available. Open May-October.
Katonah Museum of Art, Katonah	40,000	Adults: \$3.00 Children (under 12): Free	Traveling exhibitions spanning a spectrum of cultures, media, historical periods. Concerts and festivals offered year-round. Gift shop.
Eleanor Roosevelt National Historic Site, Hyde Park	39,000	Adults: \$5.00 Children (16 & under): Free	Guided tour of Roosevelt's furnished home, Val-Kill. Tour includes introductory film. Entrance to the park grounds and gardens is free. Open May-October
Boscobel Restoration,	38,097	Adults: \$8.00	Opened to the public in 1961. Example of Federal domestic

Garrison		Children (6-14): \$5.00 Seniors (62+): \$7.00	architecture. Summer theater. Open April-October.
----------	--	--	---

University Art Museum, University at Albany Albany	37,000*	No charge.	Diverse collection. Presents 8-10 exhibits a year. No permanent exhibition space for University Art Collection. Open year-round.
Mills Mansion State Historic site, Staatsburg	31,995	Adults: \$3.00 Children: \$1.00 Seniors: \$2.00	American Renaissance mansion on a 192-acre estate. Currently under restoration. Open April-October.
Hudson River Maritime Museum, Kingston	30,000	Adults: \$4.00 Children (6-12): \$3.00 Seniors (60+): \$3.00	Maritime history. Indoor and outdoor exhibits, gift shop, waterfront special events. Operate the 20 th Century Rondout Lighthouse. Open May-October.
Hudson River Museum, Yonkers	30,000*	Adults: \$4.00 Children (12 & younger): \$1.50 Seniors (62+): \$3.00	Interdisciplinary science, art and history museum. Planetarium and mansion on grounds.
Senate House State Historic Site, Kingston	30,000*	Adults: \$3.00 Children (5-12): \$1.00 Seniors: \$2.00	Site of the first Senate meeting in 1777. Art work in museum, gardens, visitor center, and re-enactments. Open April-October.
Stony Point Battlefield, Stony Point	21,800	No charge.	Site of a battle between the American Infantry and a British fort; the Americans were victorious. Audio-visual presentations at the museum. Guided and self-guided tours. Open April-October.
Washington's Headquarters State Historic Site, Newburgh	21,203	Adults: \$3.00 Children (5-12): \$1.00 Seniors: \$2.00	Military headquarters and house of Washington from 1782 to 1783. First publicly operated historic site in the United States. Visitor Center on-site. Open April-October.
Martin Van Buren National Historic Site, Old Chatham	21,000	Adults: \$2.00 Children (16 & younger): Free	Site currently encompasses 38.5 acres. Open Visitor Center on-site. Open May-October.
Shaker Museum and Library,	18,000	Adults: \$8.00	Founded in 1950 to tell the history of the Union Society of

Old Chatham		Children (6017): \$4.00 Seniors: \$7.00	Believers in Christ's Second Coming. Accredited by the American Association of Museums. Open May-October.
-------------	--	--	---

Samuel F.B. Morse Historic Site, Poughkeepsie	16,000	Adults: \$5.00 Children (6-18): \$2.00 Seniors: \$4.00	Locust Grove, former home of Samuel Morse, open to the public from May-October. Grounds open year round. Visitor Center and museum shop on-site.
New Windsor Cantonment State Historic Site and National Purple Heart Hall of Honor, Vails Gate	13,000	Adults: \$3.00 Children (5-12): \$1.00 Seniors: \$2.00	Reproduction period site of General Washington's winter troops in 17u82. Activities like blacksmithing, musket drill and military medicine are re-enacted. Open May-October.
Hart-Cluett Mansion, Troy	10,500	Adults: \$3.00 Children: \$2.00 Seniors: \$2.00	Intact home from the later Federal period. Guided tours available. Gift shop. Open February-December.
Locust Lawn/Terwiliger House, Gardiner	10,000*	Adults: \$8.00 Children (5-12): \$3.00 Seniors: \$7.00	Currently closed for renovations. 1814 mansion furnished with its original collection, textiles and paintings. Tours are by appointment only.
Schuyler Mansion State Historic Site, Albany	10,000*	Adults: \$3.00 Children (5-12) \$1.00 Seniors: \$2.00	Georgian home built in 1761. Several prominent figures in the American Revolution, including Washington, were entertained here. Open April-October.
Thomas Cole National Historic Site, Catskill	2,000	N/A	Home of Thomas Cole, considered the founder of the Hudson River School off Art.
Kykuit, The Rockefeller House and Gardens	45,667	Adults: \$20.00 Children: \$17.00 Seniors (62+): \$19.00	Part of Historic Hudson Valley. A property of the National Historic Trust. Home to four generations of the Rockefeller family. Visitor center, café and gift shop. Open April-November.
Phillipsburg Manor, Sleepy Hollow	52,742	Adults: \$8.00 Children (5-17): \$4.00 Seniors (62+): \$7.00	Part of Historic Hudson Valley. Restored Colonial farm and working gristmill. Seasonal café on-site. Open March-December
Sunnyside,	38,826	Adults: \$8.00	Part of Historic Hudson Valley/. Home of Washington Irving. Café

Tarrytown		Children (5-17): \$4.00 Seniors (62+): \$7.00 Grounds: \$4.00	on-site. Open March-December.
-----------	--	---	-------------------------------

Union Church of Pocantico Hills, Sleepy Hollow	17,557	All visitors: \$3.00	Part of Historic Hudson Valley. Features stained glass windows commissioned by the Rockefeller family and designed by Henri Matisse and Marc Chagall. Open April-December.
Montgomery Place, Annandale-on-Hudson	29,212	Adults: \$6.00 Children (5-17): \$3.00 Seniors (62+): \$5.00 Grounds: \$3.00	Part of Historic Hudson Valley. 434-acre estate with a mansion, gardens and “pick your own” orchard. Open March-December
Mohonk Preserve, Inc., New Paltz	N/A	Non-members/weekday: \$5.00 Non-members/weekends or holidays: \$7.00 Members and children: Free	New York State’s largest privately funded nature preserve. Over 6,400 acres. Visitor Center with exhibits and gift shop. Self-guided trails. Open year-round.

Source: 2001 *Official Museum Directory*, American Association of Museums, *Hudson River Valley Greenway Historic Sites Directory*, Hudson River Valley Greenway Communities Council, and Historic Hudson Valley.

Note: (*) = Estimates

Note: N/A = Not Available

The most popular attraction in the region, however, is Rye Playland, an historic amusement park located in Rye, Westchester County. Playland was estimated to have 1.1 million visitors in 2000 and received strong visitation from families and groups. Shopping has also proven to be a popular generator of visitors to the region. The Westchester County Office of Tourism reported that The Westchester, an 850,000 square foot upscale shopping mall, with 160 stores and concierge services and valet parking, has generated numerous trips from visitors from outside the region.¹⁸

REGIONAL ATTRACTIONS SUMMARY

The Hudson River Valley Region is a popular visitor destination in the United States. Approximately 7 to 8 million visitors visited the Hudson River Valley in 1995. The Hudson River Valley offers numerous and varied attractions that draw both residents and tourists. Numerous historical events have taken place in the region and several sites are preserved and open to the public. Regional attractions include historical sites such as the homes of former Presidents, military headquarters and persons involved in the Revolutionary War, as well as art museums, maritime museums and nature preserves. Estimated attendance in 1999 at the profiled attractions ranged from 1.1 million at Rye Playland to 2,000 at the Thomas Cole National Historic Site in Catskill. Adult admission costs range from no charge at the West Point Museum to \$20.00 at Kykuit, the Rockefeller House and Gardens. Other important attractions in the region include the 850,000 square foot Westchester Regional Shopping Mall.

The Sing Sing Historic Prison will add to the critical mass of attractions in the region and will help to reinforce the focus on history generated by the numerous historic attractions in the region. However, the unique content of the facility, though historic in nature, will enable the Sing Sing Historic Prison to stand out among its peers as a truly one-of-a-kind visitor experience in the region.

¹⁸ “Westchester Tourism Hits \$1 Billion Mark” in *Westchester County business Journal*, Vol. 40, No. 13, Pg. 24, March 26, 2001.

Section IV

COMPARABLE PROJECT EXPERIENCE

This section reviews the experience of other currently operating historic prison museums in the United States.

Background of Prison Museums

Prisons are a familiar part of the American landscape and mythology, and though they are the subject of boundless curiosity and interest, few people have visited – or have wished to visit – a prison. The themes of prisons and incarceration and the stories of famous and infamous prisoners are popular topics of interest and are widely available through the various media: feature and documentary films, television, books and magazine articles, among other types. Due to the public's sustained curiosity and interest in prison-related themes and storylines, prisons – both closed and operating – have become popular locations for the filming of motion pictures and television series. Television shows like “Law and Order” and “Oz” and recent motion pictures such as “Dead Man Walking” and “The Shawshank Redemption” attest to the appeal of the themes of crime and punishment and curiosity about life behind bars. Presenting prisons in this way creates the ability to enter the world of the prison without having to go within the walls.

One of the results of the evolution of the corrections industry is the development of new correctional facilities that incorporate modern technologies and current policies in managing prison populations. Left behind, of course, are the older correctional facilities; usually aging, large, and architecturally unique structures that have outlived their intended usefulness – some, in fact, that have been shut down because the degraded conditions within the walls have been considered a form of “cruel and unusual punishment.” One potentially viable opportunity for these facilities is to open them to the public as visitor attractions.

Though there are not a large number of prison museums currently operating in the United States, those that are provide valuable insight into the available markets, the demographic profile of visitors, and the key operational and marketing factors that are unique to prison museums that are critical to successful project development. Attendance patterns and visitor characteristics of comparable visitor attractions in the region and nationally are profiled in this section. This review focuses on projects that provide comparable situations in terms of the physical characteristics of the attractions, the type of location and the overall market. The profile includes (as data is available) physical size, program elements, market characteristics, visitation patterns and the specific market and operating characteristics of the other historic prisons and prison museums. Comparable project evidence will be compared and applied to the proposed conceptual program for the Historic Sing Sing Prison.

Experience of Selected Prison Museums

The series of tables below presents the market and operating characteristics of four historic prison museums:

- Louisiana State Penitentiary Museum, Angola, Louisiana
- West Virginia Penitentiary, Moundsville, West Virginia
- Eastern State Penitentiary Historic Site, Philadelphia, Pennsylvania
- Alcatraz Island, San Francisco, California

These four comparable attractions represent some of the most well-known prison museums in the United States. Alcatraz, of course, is known worldwide and the others are popular regional attractions. Because of the scarcity of historic prison museums in the United States and their many unique characteristics, no one facility will provide a market and operating profile that will match up exactly with what is envisioned for the Sing Sing historic Prison. The Sing Sing Historic Prison will further distinguish itself from these comparable facilities because the prison is still operating and visitors will be within the facility's security perimeter. (Although the Louisiana State Penitentiary is still operating, the museum is located outside the prison.) In a sense, the Sing Sing Historic Prison will be a unique facility, even among other historic prison museums in the region and nationally. Despite this, there are many useful findings from an examination of these comparable prison museums that hold some good lessons for the development of the Sing Sing Historic Prison. The comparable prison museums are profiled below in Tables IV-1 through IV-4, and a discussion of lessons follows.

Table IV-1
 Characteristics of Louisiana State Penitentiary Museum
 Angola, LA

Facility Name and Location	Louisiana State Penitentiary Museum, Angola, Louisiana
Date Opened to Public	1998
Description of Facility and Collections	Located 60 miles northwest of Baton Rouge on the Mississippi River, the museum itself is located outside the main entrance to the 18,000-acre Penitentiary. The Penitentiary is still in operation and houses approximately 5100 inmates. The museum focuses on the history of the institution and contains an authentic electric chair, artifact galleries of uniforms, officers' weapons and contraband, and a collection of maps and historic archives. Tours of both the museum and the prison (a recent development, by appointment only) are offered. Current inmates on approved speaker's lists are allowed to speak to visitors about prison life. The museum also has a gift shop.
2000 Attendance and Attendance Trends	Approximately 14,400 visitors. Attendance has increased with each year of operation. Busiest periods include October, due to the Angola Prison Rodeo, and March and April, when school field trips are at their peak. Visitation dips in the summer due to the heat.
Pricing and Hours of Operation	Free; Donations accepted. Open Monday through Friday 8 a.m. to 4:30 p.m.; Saturday 9 a.m. to 5 p.m.; Sunday 1 p.m. to 5 p.m. Closed major holidays.
Special Facility Uses	LSP hosts one of two remaining prison rodeos in the United States each October. The Museum coordinates with prison rodeo organizers to market both attractions.
Target Audience	Primarily the educational community, including schools and other learning institutions Tour groups are another target market.
Visitor Demographics	Approximately 75% of visitors re in organized school or other tour groups. The remaining 25% are families or adult individual visitors. The Museum reports a surprising number of foreign visitors and suggests that they are attracted to the region by the riverboat cruises and plantation homes in the region.
Marketing Strategy	Mostly print advertising in State travel promotion publications and tourism magazines. Distribution of brochures in region and website (www.angolamusemu.oreg). Most of the marketing budget is associated with the Angola Rodeo, which brings the highest level of visitation.

Membership	A new membership program is in the planning stages.
Number o Employees	One full-time paid; three part-time paid. Full- and part-time volunteers on an as needed basis.

Governance and Operations	501(c)(3) non-profit corporation. 24-member Board of Directors
Sources of Funding	The State of Louisiana pays for facility operating expenses and staff salaries and benefits. Exhibits, collections and programming are paid for through the museum foundation fund, which derives the majority of its revenue from donations and gift shop sales. There is very little earned income.
Keys in Visitation and Operating Strategy	<p>The ability to source, write and be awarded grant funding is critical. A board member should have experience soliciting grant funding from private and public sources.</p> <p>The Board of Directors should be diversified and have knowledge of accounting, business and legal issues surrounding facility operations. It also aids in fundraising in community.</p> <p>The reputation and history of the Angola State Penitentiary is a major attractor. The history of the facility is violent, and it serves to generate great amounts of curiosity. However, exhibits and programs should not glorify prison life; rather, exhibits should interpret history of facility and let those who experienced the facility speak for themselves. Exhibits must also be diverse and appeal to various age levels and interest.</p>

Source: Louisiana State Penitentiary Museum

Table IV-2
 Characteristics of West Virginia Penitentiary
 Moundsville, WV

Facility Name and Location	West Virginia Penitentiary, Moundsville, West Virginia
Date Opened to Public	1995
Description of Facility and Collections	Historic 1876 Gothic penitentiary building listed on the National Register of Historic Places in Moundsville, 12 miles from the City of Wheeling. The facility was closed in 1995 after a long history that included 94 total executions of prisoners. The facility itself is the main attraction, and visitors are led through the prison on guided tours, which depart every our. Night tours are also available. A permanent exhibit room showcases prison artifacts, including the original electric chair, photos and historical news clippings. There is a museum shop in the lobby.
2000 Attendance and Attendance Trends	Attendance in 2000 was approximately 20,000 visitors for tours. An additional 10,000 visitors come to the penitentiary for annual Halloween tours, which take place in the evenings for two weeks preceding Halloween night. Attendance has been fairly consistent over the past few years. There was a serge in attendance from the facility's exposure on MTV in 2000, which resulted in the establishment of nighttime tours of the penitentiary. Peak visitation months are July-August and October (due to Halloween program). Average length of stay is two hours. Tours are 90 minutes in length.
Pricing and Hours of Operation	\$8.00 Adults; \$5.00 Children 6-10. Group rates are available. Open Tuesday through Sunday 10 a.m. to 4 p.m. April 1 to November 30. Open December to March by appointment only.
Special Facility Uses	Special Halloween tours. Popular as a filming location for television and feature films. Also host annual Mock Prison Riot Training Event and Convention, which showcases new training techniques and technologies available to the corrections industry.
Target Audience	Targets three different market segments: history/cultural visitors (including school and other tour groups), persons interested in paranormal aspects of facility, and persons involved in the corrections industry. There is no minimum age for entrance to the facility. Tour guides base content on the composition of the tour.
Visitor Demographics	Day tour visitors are comprised largely of school groups and individual visitors. Tour bus visitors (mainly retirees) comprise approximately 10% to 20% of visitation. Because of the small resident population, most visitors come from other regional markets, including Columbus, Cincinnati, Pittsburgh, Washington, DC and New York. The facility points out that in 2000,

	visitors came from 49 states and 17 countries.
--	--

Marketing Strategy	The Penitentiary has developed partnerships with statewide CVBs and the State Division of Tourism to distribute brochures and place advertising. Other advertising and marketing is done through the facility's website (www.wvpentours.com)
Membership	A membership program is in place but not very active.
Number of Employees	Ten full-time equivalent (FTE) positions. Includes one interim director, one tour coordinator, one tour manager, eight tour guides and two full-time maintenance personnel. Guides are part time and work approximately 25-30 hours per week.
Governance and Operations	Non-profit 501 (c)(3) corporation. Operated by the Moundsville Economic Development Council.
Sources of Funding	Operating funding is derived from the State of West Virginia. Tour and gift shop revenues support tour operations. Rentals provide a critical source of income, especially the Mock Riot training.
Keys to Visitation and Operation Strategy	Diversified sources of income (ticket sales, special events, facility rentals) are key to sustaining operations. Marketing must be broad-based to appeal to a number of interest groups.

Source: West Virginia Penitentiary

Table IV-3
 Characteristics of Eastern State Penitentiary Historic Site
 Philadelphia, PA

Facility Name and Location	Eastern State Penitentiary Historic Site, Philadelphia, Pennsylvania
Date Opened to Public	1994
Description of Facility and Collections	Early American penitentiary complex covering 12 acres and containing 20 connected buildings in the heart of Philadelphia. Exhibits include prison furnishings and personal objects, an exhibit comparing the solitary confinement model developed at Eastern State with modern “supermax” facilities, and a recreation of the cell of famed mobster Al Capone. Guided tours of the facility take one hour and feature the main rotunda, the baseball diamond, solitary confinement cells and death row. Visitors can do self-directed tours of the open parts of the facility. The penitentiary was named a National Historic Landmark in 1965 while it was still in operation.
2000 Attendance and Attendance Trends	Attendance for tours has risen from approximately 11,000 in 1994 to 21,000 in 2000. Based on attendance to date in 2001, the facility expects to have over 21,000 visitors for the year. A special Halloween tour program has become a major event in Philadelphia, generating 31,000 visits in 2000. About 35,000 are expected for 2001. As a result, October is the busiest month, and fall and spring seasons are busy as well due in part to school tours. Tours last one hour and the average length of stay is estimated to be between 1-1/2 and 2 hours.
Pricing and Hours of Operation	Tour pricing is \$7.00 for adults, \$5.00 for seniors and students, and \$3.00 for children ages 7 to 17. No children under 7 are allowed in the facility. Halloween tours run \$15.00 per adult and \$10.00 for children on on-peak nights and \$20.00 adult and \$13.00 children on peak nights. The facility is open in 2001 between May 5 and November 4. Hours are 10 a.m. to 4 p.m. June through August, the facility is open Wednesday through Sunday. In May, September and October, the facility is open weekends. The facility is closed in the winter months because there is no heat and running water. Tours, however, are given upon request during this time.
Special Facility Uses	The Eastern State Penitentiary Historic Site hosts a number of special events and programs, including a lecture series, a flea market, film showings, and a Bastille Day neighborhood street party. It also hosts a number of art installations throughout the year, many of which relate to the themes of prison, crime and punishment. The Halloween event, entitled “Terror Behind the Walls” is the most popular special event operated by the facility.

Target Audience	Historical/cultural visitors, families, school groups and local residents. Tours began in 1994 initially as a way to acquaint neighborhood residents to the facility.
Visitor Demographics	Approximately one-half of visitors are from the greater Philadelphia metropolitan area and one-half are from beyond the metro area. The facility estimates that approximately 50% of visitors live in Pennsylvania, 40% are from other states in the region (New Jersey, New York, Maryland and Washington, DC principally) and 10% of visitors are from outside the United States.
Marketing Strategy	The facility states that it has very little funding for marketing effort. It seeks to raise awareness through publicity for its events. It also places advertising in tourist publications for the Philadelphia area.
Membership	\$30.00 single, \$40.00 family, \$20.00 student, \$250.00 sustaining memberships available. Members receive free admission, regular publications and event updates, and tickets to special programs and events.
Number of Employees	Three full-time paid and 10 part-time positions. Full-time positions are administration; part-time positions are tour guides. Halloween program enlists approximately 1009 paid, part-time employees, including actors, makeup artists, staging, technical personnel, and box office and ticketing staff.
Governance and Operations	501 (c)(3) non-profit corporation formed in 1998. The group has a 20-year concession agreement with the City of Philadelphia, which is the owner of the building. Exhibits and program expenditures are about \$280,000, much of which is for the Halloween program. Personnel make up the other major expenditure, approximately \$200,000, annually. Administration budget is \$90,000, and marketing budget is \$20,000. Remaining program funds are used for site maintenance and repair.
Sources of Funding	Total operating budget is approximately \$730,000. Roughly \$600,000 is earned income from ticket sales and retail. About \$110,000 is derived from gifts and grants from the Pennsylvania Historical and Museum Commission and the Pennsylvania Council for the Arts. Location filming fees and rentals are approximately \$10,000.
Keys to Visitation and Operating Strategy	A prison facility appeals to a broad range of interests, so its exhibits and programs much reflect these varied interests. Special events and programs are key to generating initial and repeat visitation. Attendance for day prison tours is notably high around the time of the Halloween program, as local residents are introduced to the museum at that time.

	A good relationship with the surrounding community helps to make the facility a focus of numerous community events. It also makes marketing and publicity efforts easier.
--	---

Table IV-4
 Characteristics of Alcatraz Island
 San Francisco, CA

Facility Name and Location	Alcatraz Island, San Francisco, California		
Date Opened to Public	1973		
Description of Facility and Collections	Famous island prison located in San Francisco Bay operated by the National Park Service as part of the Golden Gate National Recreation Area (GGNRA). Indoor and outdoor interpretive programs trace the history of the island, including natural history, military significance, prison development, and the Native American occupation of the island between 1969 and 1971. The museum contains three major exhibit halls and a 14-minute orientation video. Park rangers are posted at different locations throughout the island offering informational programs and to assist with visitor questions. A 35-minute audio tour is available for an extra charge.		
2000 Attendance and Attendance Trends	There were 1.5 million visitors to Alcatraz in 2000. Peak day attendance to the Island is 4,000 visitors. This is limited by available boat capacity. In 1981, annual attendance was 500,000 visitors. This increased to approximately 750,000 visitors in 1987, when self-guided tours were implemented. Attendance doubled to 1.5 million with the implementation of the audio tour, which allowed the Island to process more visitors simultaneously, and the establishment of evening tours. The rental rate of the audio tour is at 90%. In the summer peak periods, tickets to Alcatraz are sold out weeks in advance and it is not uncommon to turn away 5,000 to 10,000 potential visitors daily.		
Pricing and Hours of Operation	<u>Day Tour without Audio:</u> Adults \$8.75 Children (12-18): \$8.75 Children (5-11): \$5.50 Seniors (62+): \$7.00	<u>Day Tour with Audio:</u> Adults \$12.25 Children (12-18): \$12.25 Children (5-11): \$7.00 Seniors (62+): \$10.50	<u>Evening Tour:</u> Adults \$22.00 Children (12-18): \$19.25 Children (5-11): \$12.75 Seniors (62+): \$19.25
	Day visits start at 9:30 a.m. and the island closes at 4:30 p.m. in the fall and 6:30 p.m. in the summer. There are 10 daily departures from Pier 41 to Alcatraz and 12 daily departures from Alcatraz to the mainland.		

Special Facility Uses	Alcatraz offers special guide-led evening tours of the Island, which include an audio tour and map. As well, Alcatraz and Angel Island combination tours are offered. This day-long excursion lasts 5-1.2 hours and costs \$35.50 for adults, \$34.50 for seniors, \$32.75 for persons 12-18, and \$22.25 for persons 5-11.
-----------------------	---

Target Audience	Alcatraz has never lacked for visitors and arranges exhibits and programs to serve the broadest possible audience. Exhibits are designed to be appreciated at a number of levels, and audio tours are available in a number of languages, reflecting the large numbers of international visitors to Alcatraz.
Visitor Demographics	Alcatraz is a well-known international destination and visitors come from around the world. Survey data show that the greatest number of international visitors come from the United Kingdom, Germany and Canada. Domestic visitors come from every state. Most common are family groups, and the average visitor size is 4.6 persons. About 85% of visitors are first-time visitors to Alcatraz.
Marketing Strategy	As one of the most visited and best-known attractions in the San Francisco area, little marketing is needed to alert potential visitors to Alcatraz. The Blue and Gold Fleet, which operates the three boats to and from Alcatraz (capacity of 500 to 700) engages in marketing both nationally and internationally. Tickets for Alcatraz are sold through Blue and Gold as part of a vendor agreement with Alcatraz.
Membership	None
Number of Employees	Five full-time park rangers and one full-time maintenance employee are posted at Alcatraz. There are a total of 45 employees working at Alcatraz. Employee numbers are higher in the peak summer season. These include vendors of audio tours, bookstore staff and tram operators.
Governance and Operations	Alcatraz is a unit of the Golden Gate National Recreational Area (GGNRA), which is operated by the National Park Service, a Federal Agency. The GGNRA is the largest urban national park in the world, and had a FY2000 operating budget of \$12,467,000. Tickets for Alcatraz are purchased through the Blue and Gold Fleet and 12% of ticket revenue is placed in a government improvement account for National Park Service initiatives and maintenance.
Sources of Funding	Most funding is derived from annual public appropriations and funding from a number of public sources.
Keys to Visitation and Operating Strategy	Marketing to bus and boat tour operators is critical to sustaining visitation levels. Prisons are fascinating to many because they are authentic. Exhibits should attempt to capture this authenticity, especially through the use of first-person narratives that can be woven into the exhibits and particularly part of an audio tour experience. Do not overlook importance of local-level tourism industry resources and the local press in helping to promote the attraction.

Source: Office of Public Affairs, Golden Gate National Recreation Area and School of Natural Resources, University of Vermont, *Research to Support Visitor Management to Alcatraz Island, Study Completion Report*.

Lessons Learned and Implications for Sing Sing

Though each profiled prison museum exhibits a number of differences with regard to locational context, scale of operations and visitation, and governance, there are a number of shared characteristics and operational practices that can help inform the development and operations of the Sing Sing Historic Prison:

- **The Market for Visitation to Prison Museums is Broad.** All profiled prison museums stated that prison museums are of natural interest and curiosity to a broad segment of the marketplace. A visit is motivated by historical interest, interest in prison architecture, interest in aspects of American social history, and general curiosity. Since there are few historic prison museums in the United States, these facilities are unique in their respective markets. Marketing efforts should reflect the broad appeal of these facilities.
- **Exhibits Should be Appreciated on a Number of Levels.** Because the audience for an historic prison museum is broad, the exhibit and interpretive program should be broad as well such that it is appealing to and can be appreciated by visitors of distinct interests and different age levels. The exhibit program should be at once educational and entertaining. Optional guided or audio tours have shown to be popular choices for visitors.
- **Special Programs and Exhibits Help to Drive Visitation.** Numerous changing exhibits and special programs are critical to bringing in new visitors and promoting repeat visitation. In the comparable facilities profiled, special exhibits and programs (from art installations to Halloween tours to rodeos) are major generators of visitation and revenue that helps support overall facility operations.
- **Organized Groups are Important Components of Visitation.** All of the profiled facilities cited the importance of group visitors, including school groups and bus tours, as important visitor segments, especially during off-peak visitation periods.
- **Exhibits Focus on Authenticity of the Prison Experience.** Prisons are unique historic structures that have many stories to tell and provide views into a world that few have experienced. This unique visitor experience is greatly enhanced through the exhibition of authentic documentation, furnishings and oral histories as told by prisoners and others who spent time at the facility. A comprehensive “story line” that is much more than the sum of its individual exhibits helps to reinforce the sense of place of the facility.
- **Creative Marketing is Necessary to Attract Visitors.** Competition for visitor’s leisure time and discretionary income is fierce; prison museums need to work creatively to market their unique visitor attractions. Strategies employed by the comparable institutions include capitalizing on publicity from local and regional media sources, working collaboratively with statewide and regional tourism organizations and tourist promotion agencies, and organizing familiarization tours for tourism industry professionals.

Section V

SUMMARY OF PRIMARY MARKET RESEARCH

As part of the market research effort, Davidson-Peterson Associates conducted a three-tiered study of residents of the New York tri-state metropolitan area and visitors to the New York City and Westchester County/Hudson River Valley areas in an effort to determine the appeal and feasibility of developing a historic prison museum on the grounds of the Sing Sing State Prison in Ossining, New York. The survey was designed to address the following objectives:

- To determine the likely interest in visiting the proposed Sing Sing Historic Prison;
- To assess interest in visiting the museum at various price levels;
- To describe likely visitors;
- To explore appeals and drawbacks of the proposed museum experience; and
- To examine perceptions of safety based on the museum's location.

Methodology

Data collected for this study used three separate approaches: a visitor intercept survey, a resident telephone survey, and focused group discussions with Westchester, Rockland, NY and Fairfield, Ct county residents. In all, a total of 995 interviews, both intercept (494 completed questionnaires) and telephone (501 completed questionnaires), were completed as part of this study.

Visitor Survey

Intercept interviews were conducted among visitors of New York City* and the Westchester County/Hudson River Valley Area.** Interviewers distributed self-administered questionnaires to interested participants to be completed and returned to the interviewer. The interviews were completed between August 16, 2001 and September 8, 2001. Visitors to New York City and Westchester County completed a total of 484 intercept interviews.

Of this total, 239 visitors were intercepted at the following locations in New York City:

- Times Square Visitors Center
- Central Park
- Salute to New York Festival, Madison Ave. between 42nd and 57th Streets

* For the purposes of the intercept survey, a visitor to the New York City area is defined as someone who does not either live or work in the New York tri-state metropolitan area.

** For the purposes of the intercept survey, a visitor to the Westchester County area is defined as someone visiting an attraction or shopping who does not either live or work in the local community,

A total of 255 self-administered intercept interviews were completed at the following locations in the Westchester County/Hudson River Valley area:

- Playland in Rye
- Philipburg Manor in Sleepy Hollow
- Galleria Mall in White Plains

The terrible events of September 11, 2001 have undoubtedly had at least a short-term impact on the way potential tourists look at attractions that they might visit. The impact of these terrorism attacks on interest in visiting the Sing Sing Historic Prison Museum has not been addressed in this report since the data was collected before the attacks took place. Caution should be used in interpreting the findings reported here in the current environment.

Resident Survey

A telephone study was conducted between September 4-9, 2001 with 501 residents of predetermined counties in the New York tri-state metropolitan area. These counties were grouped and analyzed in three resident markets: primary, secondary and tertiary. These resident markets are defined as follows:

Resident Market	Counties	Number of Households Interviewed
Primary Market	Westchester County, NY and Rockland County, NY	150
Secondary Market	NY Counties: Bronx, New York, Orange, Putnam NY Counties: Bergen, Hudson, and Fairfield County, CT	251
Tertiary Market	NY Counties: Dutchess, Sullivan, Ulster NJ Counties: Essex, Morris, Passaic, Sussex CT Counties: Litchfield, New Haven	100

The number of households interviewed in each resident market was established in order to provide a reliable sample for that area. Using 2000 Census data, the final results of the study were sample balanced to reflect the total household population in each area so that accurate projections to the total population could be made. On the following page is a detailed list of the counties included in this study and the weights applied to the sample from each county.

Copies of the visitor intercept and resident telephone questionnaires are attached to this report as appendices.

Resident Market	Actual Household Count	Percent of Total Households	Actual Number of Households in Sample	Desired Number of Households in Sample	Required Balancing Weight
Primary Market			(150)	(55)	
Westchester County, NY	337,142	9	76	43	0.567221
Rockland County, NY	92,675	2	74	12	0.160134
Secondary Market			(251)	(286)	
New York County, NY	738,644	19	44	94	2.146524
Bronx County, NY	463,212	12	30	59	1.974294
Orange County, NY	114,788	3	53	15	0.276933
Putnam, County, NY	32,703	1	45	4	0.092924
Bergen County, NY	330,8178	8	25	42	1.692003
Hudson County, NJ	230,546	6	26	29	1.122803
Fairfield County, CT	324,232	8	28	41	1.480646
Tertiary Market			(100)	(160)	
Dutchess County, NY	99,536	3	8	13	1.590902
Ulster County, NY	67,499	2	17	9	0.507694
Sullivan County, NY	27,661	1	15	4	0.235792
Essex County, NJ	283,736	7	9	36	4.031116
Morris County, NJ	169,711	4	11	22	1.972744
Passaic County, NJ	163,856	4	8	21	2.618941
Sussex County, NJ	50,831	1	13	6	0.499964
New Haven County, CT	319,040	8	14	41	2.913872
Litchfield County, CT	71,551	2	5	9	1.829781
TOTAL	3,918,180	100%	501	501	

Source: U.S. Bureau of the Census

Davidson-Peterson Associates, a division of Digital Research, Inc., is an independent marketing research company located in Kennebunkport, Maine. Davidson-Peterson Associates designed the questionnaires and focused group moderator's guide used in this study with input from ConsultEcon Inc./Office of Thomas J. Martin and the Sing Sing Historic Prison Committee. Davidson-Peterson Associates monitored the field work, conducted the data processing, data tabulation, analysis and summary report. All procedures were conducted in accordance with accepted CASRO (Council of American Survey Research Organization) research standards.

A copy of the tabulated data is presented as an appendix to this report.

INTEREST IN VISITING THE SING SING HISTORIC PRISON MUSEUM

There is modest interest in visiting the proposed Sing Sing Historic Prison Museum. After potential visitors saw/heard the concept description of the museum, fewer than half said they either *definitely* or *probably will visit* (44%). This level of interest is consistent among both residents (42%) and visitors (46%) surveyed.

Proximity to Sing Sing impacts interest in the historic prison museum. Interest in visiting the museum is highest in areas in close proximity to Sing Sing. Residents of the primary market are more likely to indicate they *definitely will visit* the museum (32%) than those in the secondary (20%) or tertiary markets (9%). Similarly, visitors to Westchester areas are more likely to be interested in visiting the museum (29%) than are those visiting New York City (10%).

There is distinct price sensitivity to the suggested admission prices of \$8.00, \$11.00 and \$14.00. The lowest admission price tested (\$8.00) is clearly the most likely to attract visitors to the museum and will therefore maximize the adult admission revenue per capita collected by the museum. Half of all prospective visitors either *definitely* or *probably will visit* the museum at an admission charge of \$8.00 (47%). Interest declines precipitously to 30% at \$11.00 and declines again at the highest price of \$14.00 (22%). Similar patterns associated with admission price sensitivity are observed in the interest levels of all groups analyzed primary, secondary, tertiary market residents, Westchester County visitors, and New York City visitors.

THE POTENTIAL MARKET FOR SING SING HISTORIC PRISON MUSEUM

Likely visitors and non-visitors differ based upon several key demographic characteristics.

These characteristics are all tied either directly or indirectly with the age of the respondent.

- Likely visitors are significantly younger on average than likely non-visitors are (40.1 to 4.5).
- Likely visitors are less affluent than likely non-visitors (\$70,700 will visit vs. \$76,700 will not visit). Although occupational standing between likely visitors and non-visitors is similar, likely visitors are younger and as a result do not earn as much as their non-visitor counterparts.
- Nearly half of potential visitors have children under the age of 18 living in the households (46%). A higher proportion of likely visitors have children under the age of 10 than do non-visitors (35% vs. 25%). Again, this is probably due to the fact that likely visitors are younger than are non-visitors and would typically have younger children.

A greater proportion of likely visitors are African-American and Hispanic than are non-visitors (26% likely visitors vs. 12% non-visitors). Caucasians are less likely to say they will visit the museums.

Seven potential visitors in 10 have heard of Sing Sing Prison (72%). Fewer are aware that Sing Sing is currently a *working prison* (54%). As might be expected, awareness of Sing Sing increases with the proximity to Ossining, NY

THE APPEALS AND DRAWBACKS

The most significant appeal of the museum is its potential ability to offer an *interesting historical and educational experience*. Most believe it will help teach children of the dangers of crime and feel they will also learn.

Potential visitors who offer suggestions as to why the museum experience would be unappealing, focus on their *lack of interest rather than a concern over safety issues*. Without receiving any prompting, only a handful of potential visitors mention the *safety* of the proposed museum as a deterrent to visitation.

Potential visitors are as likely to agree that they would feel *uncomfortable seeing exhibits in a museum adjacent to a working prison* (39%) as to disagree (40%). Such concern is not a widespread issue for prospects.

CONCLUSIONS AND RECOMMENDATIONS

Devising an appropriate and effective marketing strategy for the proposed museum will be critical in the building of a visitor base.

There is some initial interest in visiting the museum. Strong marketing will be necessary to create interest and to trigger the decision to visit. Such marketing needs to overcome moderate levels of interest – not a widely held negative view of the prison movement – and to appeal to the large surrounding resident population, which is a great asset. This is an important point. Moderate levels of interest do not necessarily mean that the potential visitors hold a negative view of the museum, which would be much more difficult to reconcile than the view held here. The key will be to create interest in visiting the museum, to make people want to visit. If a spark of interest is generated, it can fairly easily displace any feelings of hesitation and rejection on the part of the potential visitor.

One of the most appealing reasons to visit the proposed museum is the opportunity to learn about the *history* of the prison and the penitentiary system in America. Potential visitors also find the museum appealing in the belief that it will be *interesting, curious* and *fun*. The development of the museum should bear in mind that potential visitors expect the material presented to be *educational* in nature, but they will also expect the museum experience to be *interesting* and *fun*.

Marketing should be concentrated, at least initially, in nearby areas. Those prospects in close proximity to Sing Sing Prison are more likely to visit the museum than are those from locations farther away.

Potential visitors have a definite interest in visiting the museum that quickly subsides as the admission price for a single adult ticket exceeds \$8.00. Of the three admission prices evaluated, we recommend charging \$8.00 to maximize potential museum visitation, and thus, adult admission revenue per capita.

INTEREST IN VISITING THE SING SING HISTORIC PRISON MUSEUM

Anticipated Level of Interest

Interest in the Sing Sing Historic Prison Museum appears to be modest. Participants were provided with the following description of the proposed museum.

The following paragraphs describe a proposed museum and interpretive center to be located on the grounds of the Sing Sing Correctional Facility in the Village of Ossining, New York, on the Hudson River, approximately 30 miles north of New York City. Although Sing Sing is a functioning prison, the museum facilities will be completely separate from prison operations.

Exhibits at the Sing Sing Historic Prison Museum will chronicle the history of the penitentiary system in America, the historical development of Sing Sing, and tell the stories of many inmates, wardens and notable individuals who are linked with the prison.

Visitors will go inside the walls of the original 1825 prison cellblock, where they can experience how prisoners lived at different periods in Sing Sing's history and learn about prison architecture, organization and reform as seen through the lens of Sing Sing. An **optional** visit to an exhibit that re-creates the execution room, tells the story of capital punishment at Sing Sing. The final museum exhibit experience describes the operations of Sing Sing from 1825 to 1943.

After learning of the proposed plans for a museum on the grounds of Sing Sing Prison, fewer than half of all residents and visitors to the New York tri-state metropolitan area say they either *definitely* or *probably would visit* the Sing Sing Historic Prison Museum on a future trip to the area if it was already open (44%). Interest levels are similar among both residents (42%) and visitors (46%).

Only one perspective visitor in five reports that he/she *definitely would visit* the prison museum if it were already open (19%). There are not differences between residents (18%) and visitors to the area (20%) in their interest in the museum.

One potential visitor in three says that he/she either *definitely* or *probably would not visit* the museum (31%) and one-quarter of the potential visitors are undecided (24%).

Proximity to Sing Sing impacts interest in the historic prison museum.

Residents of the primary market are more likely to indicate they *definitely will visit* the museum (32%) than those in the secondary (20%) or tertiary markets (9%). Similarly, visitors to Westchester areas are also more likely to say they *definitely will visit* the museum (29%) than those visiting New York City (10%).

Likelihood of Visiting the museum on a Future Trip to the Area

		Resident Markets				Visitor Intercepts		
	Total Residents And Visitors	Total	Primary	Secondary	Tertiary	Total	NYC	Westchester/HRV
Base:	(995)	(501)	(55)	(286)	(160)	(494)	(239)	(255)
Definitely will visit	19%	18%	<32%>	<20%>	<9%>	20%	10%	<29%>
Probably will visit	25	24	22	23	26	26	21	<30>
Might or might not visit	24	22	<13>	22	24	27	<31>	23
Probably will not visit	14	16	14	13	<21>	12	15	10
Definitely will not visit	17	20	18	21	20	14	<22>	7

< > Significant at the 95% confidence level.

Willingness to Pay Admission

Total Residents and Visitors

Potential museum visitors are quite price-sensitive when asked about admission prices.

Residents and visitors were presented with three single adult admission prices: \$8.00, \$11.00, and \$14.00. It was noted that admission for children and seniors would be offered at lower prices.

The order of the presentation of prices was rotated so that half were asked if they would be likely to visit the Sing Sing Historic Prison Museum at a cost of \$8.00, then \$11.00, and finally \$14.00. The other half were asked if they would be likely to visit the museum at a cost of \$14.00 per single adult ticket, then \$11.00 and finally \$8.00.

The lowest admission price (\$8.00) presented topotential visitors is clearly the most popular alternative of the three. Willingness to visit the museum drops significantly between the \$8.00 and \$11.00 price points.

Nearly half of all prospects either *definitely* or *probably will visit* at an adult admission price of \$8.00 (47%). Interest drops sharply to 30% at \$11.00. Interest in visiting declines again at the highest price of \$14.00 to 22%. Such differences suggest there is real price sensitivity.

As seen in the table below, these findings are consistent for both residents and visitors.

Likely Visitation to the Sing Sing Historic Prison Museum

	Total			Residents			Visitors		
	<u>\$8.00</u> (995)	<u>\$11.00</u> (995)	<u>\$14.00</u> (995)	<u>\$8.00</u> (501)	<u>\$11.00</u> (501)	<u>\$14.00</u> (501)	<u>\$8.00</u> (494)	<u>\$11.00</u> (494)	<u>\$14.00</u> (494)
<u>Will visit</u>	<47%>	<30%>	<22%>	<46%>	<29%>	<19%>	<49%>	<31%>	<24%>
Definitely will visit	<22>	11	7	<25>	11	7	<20>	10	8
Probably will visit	25	19	14	21	18	12	29	21	17
Might or might not visit	19	22	21	16	20	20	21	24	23
<u>Will not visit</u>	<33>	<46>	<56>	<37>	<50>	<61>	<29>	<44>	<u>52</u>
Probably will not visit	11	20	20	11	20	21	12	21	20
Definitely will not visit	22	26	<36>	26	30	<40>	17	23	<32>

< > Significant at the 95% confidence level.

The following graph illustrates the adult admission price sensitivity.

ADD GRAPH HERE

Another way of assessing the impact of various pricing alternatives is to create a measure of admission revenue per capita. Multiplying the proportion that express positive interest (definitely/probably) in visiting the Sing Sing Historic Prison Museum by each price level, we can create a per capita adult admission price revenue measure. *Please note that the adult admission revenues per capita stated in this report are hypothetical and based on the presumption that all those who expressed an interest in visiting the museum would in fact visit. These figures are not representative of actual attendance or revenue and are intended to illustrate price sensitivity only.*

Our purpose in calculating the adult admission revenue per capita here is to provide an objective measure by which to compare the impact of the three price levels evaluated. This measure shows expected differences among the three price categories. Those differences suggest that the \$8.00 price is the strongest price for these visitors.

Admission Price	Total Residents and Visitors	
	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	47%	\$3.76
\$11.00	30%	\$3.30
\$14.00	22%	\$3.08

These findings are consistent with the results if we calculate adult admission revenue per capita using only the *definitely will visit*.

	Total Residents and Visitors	
Admission Price	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	22%	\$1.76
\$11.00	11%	\$1.21
\$14.00	7%	\$0.98

Therefore, an adult admission charge of \$8.00 would maximize admission revenues from residents of and visitors to the Westchester County and New York City areas.

Residents

As was observed in the total sample, the single adult admission price of \$8.00 is clearly the most likely to attract area residents to the Museum (46%). Only one-fifth say they either *definitely* or *probably will visit* at a price of \$14.00 (19%). By charging an adult admission price of \$8.00, the museum will receive an adult admission revenue per capita of \$3.68 – fully \$1.02 higher than if the admission of \$14.00 were charged.

At the price of \$8.00, nearly half of the residents say they *definitely* or *probably will visit* the museum (46%). Multiplying this percentage by the proposed admission price of \$8.00, results in an adult admission per capita of \$3.68.

	Residents	
Admission Price	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	46%	\$3.68
\$11.00	29%	\$3.19
\$14.00	19%	\$2.66

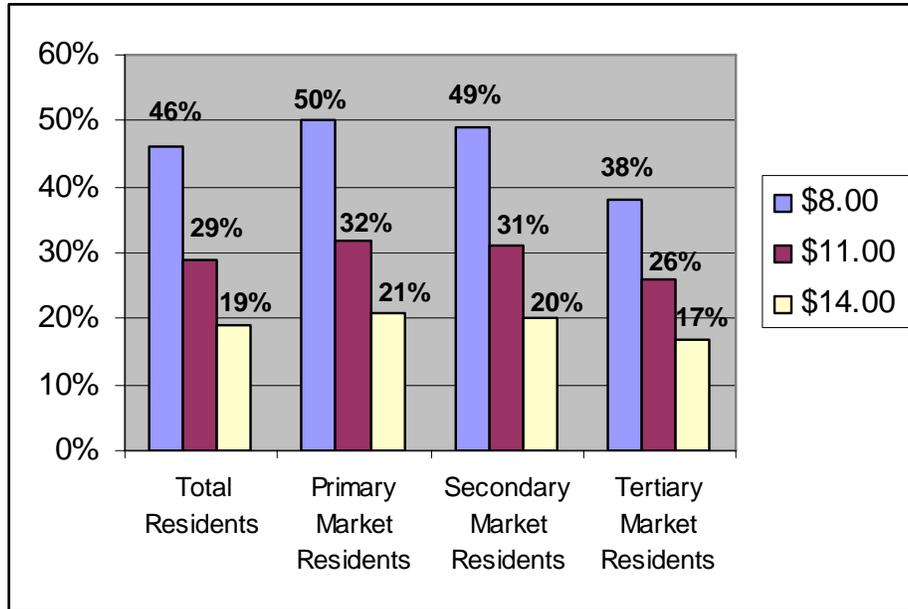
These findings are consistent with the results if we calculate adult admission revenue per capita on only the residents who say they definitely will visit the museum at each price level.

Admission Price	Residents	
	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	25%	\$2.00
\$11.00	11%	\$1.21
\$14.00	72%	\$0.98

Half of the residents living in the primary (50%) and secondary (49%) resident market areas report that they either *definitely or probably will visit* at a cost of \$8.00. Significantly fewer tertiary market residents will visit at this price (38%).

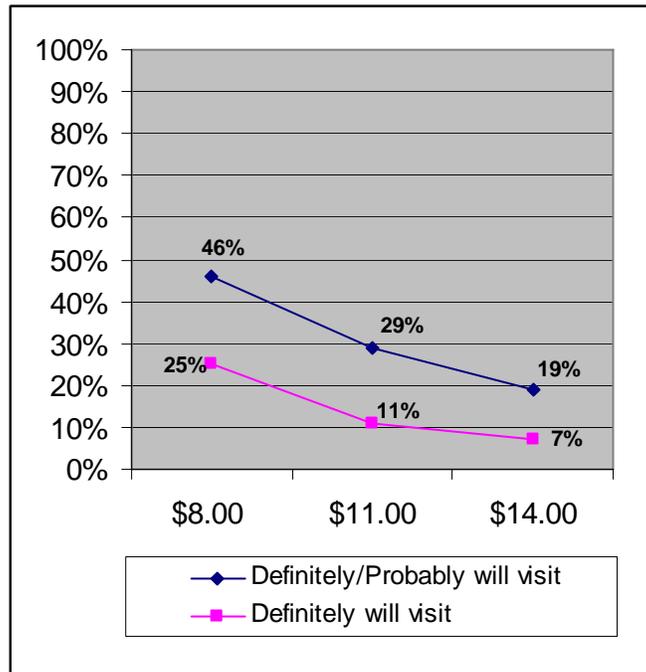
Additionally, at the price of \$8.00, twice as many residents in the primary market say they *definitely will visit* the museum than do so at \$11.00 (31% at \$8.00 vs. 15% at \$11.00). Only one primary market resident in 10 *definitely will visit* at a price of \$14.00 (10%). Similar patterns associated with admission price are observed in the interest levels of the secondary and tertiary markets.

Residents who Definitely or Probably Will Visit at Suggested Admission Prices



The following graph illustrates resident sensitivity and likelihood of visiting the museum at each of the suggested adult admission prices of \$8.00, \$11.00 and \$14.00.

**Likelihood of Visiting the Proposed
Sing Sing Historic Prison Museum at
Various Admission Prices:
Total Residents**



Visitors

As with residents, more area visitors say they are willing to visit if ticket prices are low.

Half of all visitors report that they either *definitely* or *probably will visit* if a single adult admission were offered at \$8.00 (49%). Anticipated attendance drops dramatically at the \$11.00 price level with only one area visitor in three indicating an interest in visiting the museum (31%). Only one-fourth of visitors would visit at the highest price of \$14.00 (24%). An admission charge of \$8.00 will bring the museum an adult admission revenue per capita of \$3.92 vs. only \$3.36 at \$14.00.

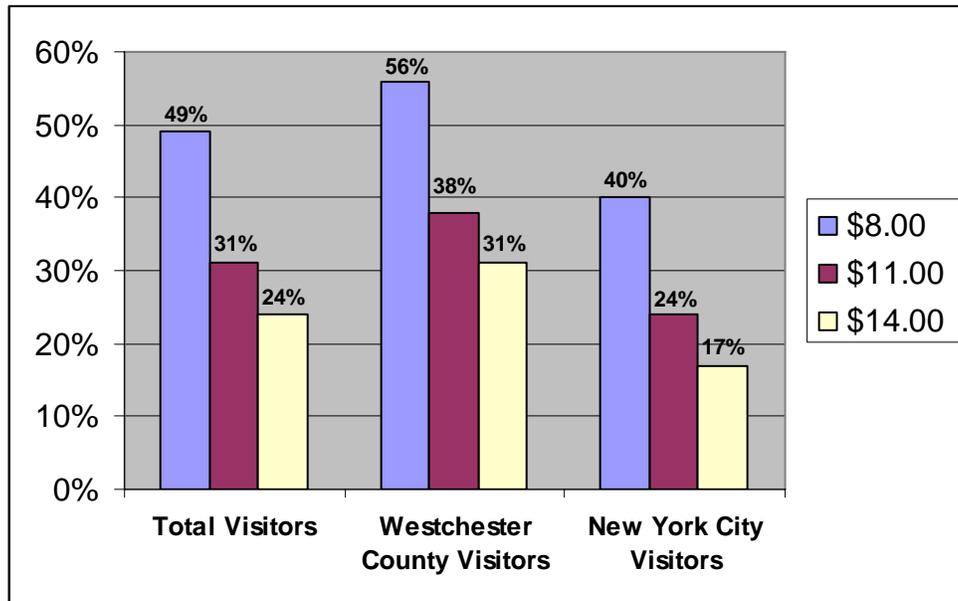
Admission Price	Visitors	
	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	49%	\$3.92
\$11.00	31%	\$3.41
\$14.00	24%	\$3.36

These findings are supported if we calculate the adult admission revenue per capita based upon only those visitors who say they *definitely will visit* at each price level.

Admission Price	Visitors	
	Definitely/Probably Will Visit	Adult Admission Revenue per Capita
\$8.00	20%	\$1.60
\$11.00	10%	\$1.10
\$14.00	8%	\$1.12

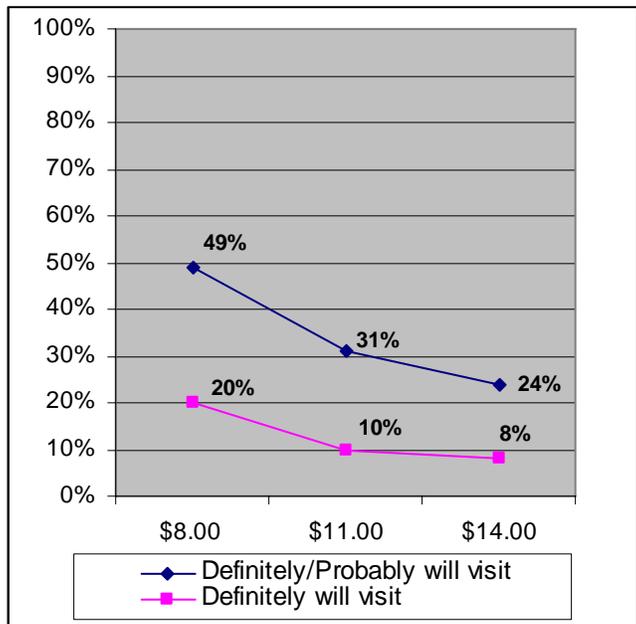
At all price levels, visitors to the Westchester County/Hudson River Valley area are significantly more likely than New York City visitors to indicate that they either *definitely* or *probably will visit* the museum. At a price of \$8.00, twice as many Westchester County visitors as New York City visitors report that they *definitely will visit* the museum (26% vs. 13%). At a cost of \$14.00 per single adult admission, only one Westchester visitor in 10 indicates that he/she *definitely will visit* the museum (9).

Visitors who Definitely or Probably Will Visit at Suggested Admission Prices



The following graph illustrates visitor price sensitivity at each of the suggested adult admission prices of \$8.00, \$11.00 and \$14.00.

**Likelihood of Visiting the Proposed
Sing Sing Historic Prison Museum at
Various Admission Prices:
Total Visitors**



THE POTENTIAL MARKET FOR THE SING SING HISTORIC PRISON MUSEUM

Who Are the Likely Visitors?

After seeing/hearing the concept description of the proposed museum, potential visitors were asked how likely they would be to visit the museum on a future trip to the area.

In several ways, likely visitors to the Sing Sing Historic Prison Museum do not differ from those who say they won't visit. Demographic characteristics that do not differentiate between likely visitors and non-visitors are: gender, educational attainment, occupation of chief wage earner in the household, and size of household.

- Gender does not differentiate those who *will* and *will not visit* the museum. Of all prospects, 40% were men and 55% were women (with 5% no answer). Among those who say they *will visit* the museum, one-third were men (37%) with the same proportion of those who say they *will not visit* the museum being men as well (38%).
- There is no difference in the level of educational attainment between those who *will* and *will not visit* the museum. Among both likely visitors and non-visitors, educational attainment is high. The majority of likely visitors have *college experience* (71%), while one-fifth are *high school graduates or less* (23%). Similar proportions of non-visitors have *college experience* (74%) and are *high school graduates or less* (18%).
- The majority of likely visitors are from households where the chief wage earner is employed in a *white-collar* profession (58%). Significantly fewer likely visitors are from a household where the chief wage earner is a *blue collar* employee (16%); the balance declined to provide their occupation (25%). The occupational standing is virtually identical among those who *will not visit* the museum; the majority have *white collar* jobs (62%), fewer have *blue collar* jobs (15%), with the balance undetermined (23%).
- An average of three people resides in each household. There is statistically no difference in the household size of those who *will visit* the museum (3.1 people) and those who *will not visit* the museum (2.9 people).

Demographic Characteristics that do not Differentiate Between
 Likely Visitors and Non-Visitors

Demographics	Total	Will Visit	Will not Visit
Base:	(995)	(437)	(313)
Gender	%	%	%
Male	40	37	38
Female	55	57	56
No answer	5	6	6
Last Year of Schooling Completed	%	%	%
High School or Less	19	23	18
College Experience	74	71	74
Occupation of Chief Wage Earner In Household	%	%	%
White Collar	61	58	62
Blue Collar	15	16	15
Average Size of Household	3.0	3.1	2.9

There are several demographic characteristics that distinguish likely visitors from non-visitors. All are tied either directly or indirectly to age.

- Likely visitors to the Sing Sing Historic prison Museum are adults under the age of 50. Three in five likely visitors are between 25-49 years of age (61%), with an average age of 40.1. The average age of those who *will not visit* the museum is higher (45.5%). Likely visitors are considerably more likely than non-visitors to be in the youngest group – 18-24 (42% vs. 26%).
- Not surprisingly, given their younger age, likely visitors are less affluent than are non-visitors (\$70,7090 will visit vs. \$76,700 will not visit).
- Half of likely visitors have children under the age of 18 living in the household (49%). More likely visitors than non-visitors have children under the age of 10 (35% will visit vs. 25% who will not visit).

Compared with those not likely to visit the museum, likely visitors are more apt to be African-American (13% vs. 7%) or Hispanic (13% vs. 5%). While more than half the likely visitors are *Caucasian* (56%), an even higher proportion of those *not likely* to visit are *Caucasian* (72%).

Demographic Characteristics That Differentiate Between
 Likely Visitors and Non-Visitors

Demographics	Total	Will Visit	Will Not Visit
Base:	(995)	(437)	(313)
Age	%	%	%
18 – 24	13	<16>	8
25 – 34	23	<26>	18
35 – 49	37	35	41
50 – 64	16	14	17
65 or older	10	8	<14>
No answer	1	1	1
Estimated Average Age	42.0	40.1	<45.5>
Ethnic Background	%	%	%
Caucasian/White	63	56	<72>
<u>Minority</u>	<u>31</u>	<u><38></u>	<u>24</u>
African-American/Black	10	<13>	7
Hispanic	9	<13>	7
Other ethnic background	12	<u>12</u>	12
Children Living in the Household	<u>46%</u>	49%	<u>43%</u>
Under 10 years of age	<u>31</u>	<35>	<u>25</u>
10 – 12 years of age	12	12	14
13 – 17 years of age	14	14	18
Estimated Average Annual Pre-tax Household Income	\$74,100	\$70,700	<\$76,700>

< > Significant at the 95% confidence level.

Current Residence of Likely Visitor Market

Likely museum visitors are more likely to be nearby than farther away. Equal proportions of residents and visitors say they either *definitely* or *probably will visit* the museum (42% residents and 46% visitors). However, within each group, those in close proximity to Ossining, New York are more likely to say they *will visit* (definitely/probably) on a future trip to the area than those farther away.

- Among residents, half of the primary market residents (Westchester and Rockland Counties) would either *definitely* or *probably* visit the museum (54%). This figure drops slightly among secondary market residents (43%), and drops again among tertiary market residents (35%).
- Similarly, among visitors to the area, those who reside in nearby U.S. locations in the tri-state area are substantially more likely than visitors from farther away in the U.S. or from international locations to say that they either *definitely* or *probably will visit* the museum on a future trip to the area (57% nearby U.S. vs. 38% far U.S. and 28% international).

Likelihood of Visiting the Museum on a Future Trip to the Area

	Total Residents and Visitors	Resident Markets				Visitor Intercepts			
		Total	Primary	Secondary	Tertiary	Total	Nearby U.S.	Far U.S.	International
Base:	(995)	(501)	(55)	(286)	(160)	(494)	(169)	(131)	(95)
Definitely will visit	19%	18%	<32%>	<20%>	<9%>	20%	30%	10%	6%
Probably will visit	25	24	22	23	26	26	28	28	22
Might or might not visit	24	22	<13>	22	24	27	24	27	36
Probably will not visit	14	16	14	13	<21>	12	11	14	13
Definitely will not visit	17	20	18	21	29	14	7	20	22

< > Significant at the 95% confidence level.

- It should be noted that because the closest resident markets are small, the majority of residents who indicate that they *will visit* actually live in the secondary market (59%). One likely museum visitor in four is a resident of the tertiary market (275), while fewer reside in the smaller primary market area (14%).

Likelihood of Visiting the Museum on a Future Trip to the Area

Total (95)		Will Visit	Will Not Visit
Visitors	Base	(174)	(106)
Nearby U.S. Visitors		<56%>	27%
Far U.S. Visitors		29	<42>
International Visitors		18	<31>
Residents	Base	(211)	(182)
Primary Market		15%	10%
Secondary Market		59	54
Tertiary Market		27	<36>

< > Significant at the 95% confidence level

VISITATION TO HISTORIC ATTRACTIONS

Prior Visitation to Historic Attractions

The overwhelming majority of residents and visitors combined have visited a historic attraction. Potential visitors to the Sing Sing Historic Prison Museum were asked if they had ever visited certain types of historic attractions. Four potential visitors in five indicated having visited one of the selected historic attractions. Four potential visitors in five indicated having visited one of the selected historic attractions (83%). The most frequently visited attractions are *historic house museums* (66%), *restored historic settlements or towns* (54%), and *World War II battleships, carriers or destroyers* (48%).

There are no important differences in attraction visitation patterns between those likely and unlikely to visit the Sing Sing Historic Prison Museum.

Have Visited Historic Attractions

	Total	Will Visit	Will Not Visit
Have Visited Attraction Base:	(995)	(437)	(313)
<i>Have visited at least one of these attractions (Net)</i>	83%	82%	83%
Historic house museums	66	65	65
Restored historic settlements or towns	54	<56>	48
World War II battleships, carriers or destroyers	48	49	45
Revolutionary War forts or battle sites	42	42	40
Civil War battlefields	35	36	34
Historic prison museums	26	28	22

< > Significant at the 95% confidence level

Potential Visitation to Historic Attractions

Potential visitors were asked if they would visit these types of historic attractions in the future if they were conveniently available. One potential visitor in three indicated that he/she *definitely would visit restored historic settlements or towns* (36%), *historic house museums* (35%), and *World War II battleships, carriers or destroyers* (34%). One potential visitor in five *definitely would visit a historic prison museum* in the future if it were conveniently available (20%).

Likely museum visitors are significantly more inclined than non-visitors to say they *definitely would visit restored historic settlements or towns, World War II battleships, carriers, or destroyers, Revolutionary War forts or battle sites, and historic prison museums* in the future if these attractions were conveniently available.

Definitely Would Visit Historic Attraction in the Future if Convenient

	Total	Will Visit	Will Not Visit
<i>Definitely would visit</i> Attraction in Future if Convenient	(995)	(437)	(323)
Basic:			
Restored historic settlements or towns	36%	<45%>	31%
Historic house museums	35	39	34
World War II battleships, carriers or destroyers	34	<41>	27
Revolutionary War forts or battle sites	28	<34>	24
Civil War Battlefields	28	32	27
Historic prison museums	20	<30>	7

< > Significant at the 95% confidence level.

Knowledge of Sing Sing

The majority of prospects say they have heard of Sing Sing Prison (72%), but only half say that it is currently in operation as a working prison (54%). Those likely to visit the museum are more likely than non-visitors to know Sing Sing is a *working prison* today (58% likely visitors vs. 46% non-visitors). Those who say they *will not* be likely to visit the museum are more likely than those who *will visit* to believe Sing Sing is *closed* (18% vs. 9%) or *not to have heard of it* 17% vs. 11%).

Knowledge of Sing Sing

	Total	Will Visit	Will Not Visit
Base:	(995)	(437)	(313)
Working prison	54%	<58%>	46%
Closed prison	13	9	<18>
Open as a museum	5	6	3
Never heard of it	13	11	<17>
Not sure	14	15	15

< > Significant at the 95% confidence level.

Not surprisingly, knowledge of Sing Sing is most widespread among those in close proximity to Ossining, New York. The farther away, the less widespread the knowledge of Sing Sing. Two-thirds of primary market residents (67%) and half of secondary market residents (59%) are aware that Sing Sing is a *working prison*. Awareness drops significantly among tertiary market residents of whom only two in five are aware of the *current operational* status of the prison (42%).

Seven Westchester County visitors in 10 correctly identify Sing Sing as a *working prison* (70%), while many fewer visitors to New York City do the same (40%). More than one-third of the New York City visitors have *never heard of* Sing Sing Prison (38% vs. 10% Westchester County visitors).

Accurate knowledge of Alcatraz's status is far more widespread. Half of all residents and visitors correctly identify *Alcatraz* as being *open as a museum* (54%), additionally, one-quarter know *Alcatraz* is *closed* but do not believe it is a *museum* (25%).

Knowledge of Alcatraz	Total
Base::	(995)
Open as a museum	54%
Closed prison	25
Working prison	7
Never heard of it	7
Not sure	7

THE APPEALS AND DRAWBACKS OF THE SING SING HISTORIC PRISON MUSEUM

The Appeal of the Proposed Prison Concept

Those who say they *will visit* the museum are likely to view it positively as a potential learning experience. Likely visitors are more apt to agree than are non-visitors that *a prison museum is a good way to learn the history of criminal punishment in our society* (76% vs. 44%) and *visiting a prison museum might be a good way to be sure older children know how serious an issue crime is* (72% vs. 44%).

When asked to provide, in their own words, reasons why the proposed museum experience is appealing, likely visitors most frequently mention the *history* presented by the museum (36%) and the belief that the museum experience will be *interesting and fun* (32%) as well as *educational, a new experience, and offering insight* (30%). Based upon these results, it seems clear that the museum experience will need to be both educational and fun and interesting.

Drawbacks of the Proposed Prison Concept

For some prospects, the proximity of the museum to a working prison is a concern. More non-visitors than visitors agree that *seeing exhibits in a museum adjacent to a working prison would make me feel uncomfortable* (53% vs. 31%), and *I believe some people would be concerned that creating a museum next to a prison would somehow take advantage of current prisoners* (35% vs. 21%).

At the same time, the primary reason volunteered as a deterrent to visiting the proposed museum is related to the prospect's personal interests and not to a fear of the museum experience. Those not likely to visit the museum say they will not do so primarily for *personal reasons* (58%). They say they're not interested due to a *lack of interest, a dislike of prisons, or a preference to see other attractions instead* (51%). Though mentioned by only a few, other personal reasons the museum experience is unappealing are due to a *lack of time/too far away* (8%) and *price/expensive trip* (1%).

One-quarter of those not likely to visit express *concerns about the prison* (25%). No single concern is mentioned by as many as 10% of non-visitors: *it is still a working prison* (8%), *it is depressing, sad, disturbing, painful, and/or unpleasant* (8%), *gruesome, morbid, eerie, and/or scary* (6%), *not appropriate for children* (5%), and *I don't think it would be safe* (1%).

It should be noted that without any prompting regarding safety issues, only nine people of all 995 residents and visitors surveyed volunteered the view that visiting the museum would not be safe. The following are the verbatim comments volunteered by these survey participants:

- “Mainly an issue of security. I don’t think it would be safe.”
- “I just have a fear of prison or people that have been to prison.”
- “I would not want to be near a prison. I am afraid of the prisoners.”
- “I’m not into prisons. I would worry about my safety.”
- “Still a prison, threat there.”
- “The fact that it’s a working prison and might be dangerous.”
- “It might be a little dangerous.”
- “Going to the prison makes me nervous.”
- “Still a threat there, I don’t think it would be safe.”

Both likely visitors (54%) and non-visitors (64%) feel that a *historic prison exhibit segment on the death penalty would be offensive to some people*. Clearly, the decision to make the death house exhibit optional is supported as a large proportion of potential visitors believe it will be offensive to some.

Views of Prison Museums

	Total	Will Visit	Will Not Visit
Agree* that: Base:	(995)	(437)	(313)
A prison museum is a good way to learn the history of criminal punishment in our society.	64%	<76%>	44%
Visiting a prison museum might be a good way to be sure older children know how serious an issue crime is.	61	<72>	44
I think a historic prison exhibit segment on the death penalty would be offensive to some people.	57	54	<64>
Seeing exhibits in a museum adjacent to a working prison would make me feel uncomfortable.	39	31	<53>
I believe some people would be concerned that creating a museum next to a prison would somehow take advantage of current prisoners.	27	21	<35>

*Those who agreed rated statements with a 4 or 5 on a 5-point scale where 1 means “Disagree Strongly” and 5 means “Agree Strongly.”

< > Significant at the 95% confidence level

Reasons Potential Museum is Appealing and Unappealing to Potential Visitors

Reasons the Museum Experience is Appealing	Total Respondents	Will Visit	Will Not Visit
Base:	(995)	(437)	(313)
History	25%	<36%>	2%
Interesting/curious/fun	23	<32>	2
Educational/new experience/insight	17	<10>	1
Other reasons	7	10	1
No answer	24	13	40
<i>Definitely will not visit the museum</i>	17	0	55
Reasons the museum Experience Would Turn Off or Deter Visitation	Total Respondents	Will Visit	Will Not Visit
Base	(995)	(437)	(313)
Personal Reasons (Net)	31%	8%	<58%>
Not interested/don't like prisons/ too many other attractions	20	3	<51>
Not enough time/too far away	9	2	8
Price/Expensive trip	3	3	1
Concerns About the Prison (Net)	16	6	<25>
It is still a working prison	5	2	8
It is depressing/sad/disturbing/ painful and/or unpleasant	5	2	8
Gruesome/morbid/erie and/or scary	3	1	6
Not appropriate for children	3	1	5
It is not safe	1	0	1
Other reasons	7	2	9
NO answer	48	85	13

< > Significant at the 95% confidence level.

A Further Look at Safety

As we have seen, the potential market is divided about their comfort with having the Sing Sing Historic Prison Museum adjacent to a working prison. Those who either *strongly* or *somewhat agree* with the statement are categorized as *uncomfortable* with the proposed museum location. Those who disagree are categorized as *comfortable* with the museum's location.

There are several differences to note between potential visitors who would feel *comfortable* visiting the museum versus those who would feel *uncomfortable*.

- Potential visitors who are comfortable visiting the museum are apt to have fewer years of formal education than are those who are uncomfortable (High school only 22% vs. 15%).
- Visitors who are comfortable are more likely to have any children at home (50% vs. 40%) and particularly more likely to have children under the age of 10 (34% vs. 27%) than are those who are uncomfortable.
- Those who are comfortable are more likely to be men (45%) and those who are uncomfortable are more likely to be women (58%).
- Those who are uncomfortable with the prison's location are more likely than others to feel that such a location might take advantage of the prisoners (44% vs. 16%). Further, they are much more likely to feel that others will find the death penalty exhibit offensive (78% vs. 48%).

Discomfort with the idea of visiting a museum near a working prison contributes to some degree to the inclination to visit the museum itself. Two in five of those who say that visiting a museum next to a working prison would be uncomfortable wither *definitely* (24%) or *probably will not* visit (19%) the museum as described. However, only one-third of those who say they would feel uncomfortable either *definitely* (11%) or *probably will visit* (24%) the proposed museum on a future trip to the area and some more *will not visit* (43%).

Note, however, that there is not a perfect correlation here. Some who are uncomfortable will visit (35%) and some who are uncomfortable won't do so (43%).

Specific questions alluding to safety issues were not asked in the questionnaire. However, an open-ended question to determine potential "turn-offs" and "deterrents" of the proposed museum was asked instead. As noted, without receiving any prompting, only 9 of the 995 potential visitors surveyed raise the idea that developing a prison museum next to a working prison *would not be safe* (1%).

ANCILLARY ISSUES

Visitors to the Area

Vacation and/or short pleasure trips are the primary reason most visitors have traveled to the New York City and Westchester County/Hudson River Valley areas (69%). One visitor in 10 is in the area to *visit friends or relatives* (10%). The balance are visiting for a variety of other reasons.

Day-trippers account for half of all visitors surveyed (48%). However, there is a considerable difference in the proportion of day-trippers in the New York City area and the Westchester area. One New York City visitor in five is a day-tripper (21%) compared to three Westchester visitors (72%) compared to one-third of far U.S. visitors (36%), and one international visitor in 10 (9%). Likely museum visitors are more likely to be day-trippers than those who *will not visit* (53% vs. 42%).

Among those who are staying overnight in the area, similar discrepancies are seen. The overall nights spent in the area is 5.2. Visitors to the Westchester area are staying overnight in the area for 2.6 nights, while New York City visitors are staying overnight for 6.0 nights. Nearby U.S. visitors intend to spend 2.1 nights in the area, while far U.S. visitors will spend 5.1 nights, and international visitors will spend an average of 6.7 nights in the area.

While half of all visitors are day-trippers, roughly one-third of visitors still stay overnight in the area in a *hotel/motel* (30%). One visitor in six will stay overnight *at the home of family or friends* (15%). Half of the New York City visitors will stay in a *hotel/motel* compared to one Westchester visitor in eight (49% vs. 13%). One-third of all visitors are staying overnight in *Manhattan* (31%). Overall, very few potential visitors are staying overnight in either *Westchester County* (5%) or *elsewhere in the Hudson River Valley* (1%).

Among all visitors, the average travel party size is three people (3.0 mean). Visitors to the Westchester/Hudson River Valley area are traveling in a party size that is one person larger than the travel party size of New York City visitors (3.5 people vs. 2.6 people). Visitors from the nearby U.S. states are also traveling in significantly larger travel parties (3.3 people) than visitors from far U.S. states (2.9 people) and international visitors (2.7 people).

Resident Attraction/Travel Patterns

One-third of all residents have visited a museum type of attraction in Westchester County or the Hudson River Valley area in the past 12 months (31%). Residents in the primary and secondary markets (44% primary and 33% secondary) are significantly more likely than tertiary market residents (24%) to have visited such an attraction in the Westchester/Hudson River Valley area in the past 12 months. Among the residents who have visited a museum type of attraction, the average number of visits in the past 12 months is 2.9.

The vast majority of residents would plan to reach the museum by car if they were to visit on a future trip to the Westchester area (82%). Only one resident in five would plan to visit the museum using any form of transportation other than a personal vehicle, such as a *train, tour bus, Hudson River boat* or a *rental car* (18%). The proportion of residents who would plan to utilize a mode of transportation other than a personal vehicle is highest in the secondary resident market, which includes residents of New York City (24%). Fewer primary market (14%) and tertiary market (10%) residents would plan to take anything other than a car.

Two residents in five say they *agree somewhat/strongly* with the statement: *I'd be more likely to visit the Sing Sing Historic Prison Museum if I could stop there on a Hudson River day cruise*(42%).

Findings from Focused Group Discussions

Introduction

Two focus group discussions were conducted on the evening of August 29, 2001 with residents of Westchester, Rockland, NY and Fairfield, CT counties. A total of 24 participants were recruited (12 participants per group). The participants were divided into two groups based upon age – one group consisted of residents between the ages of 25-44 and the second group consisted of residents between the ages of 45-64. Individuals recruited for the groups were required to meet several criteria, including:

- Must be involved in the travel planning decisions of their household.
- Must have visited an attraction in the Hudson River Valley or New York City in the past year or so.
- Must be willing to consider visiting a historic prison museum.
- If children are present in the household, the participant must have at least one child between the ages of 10-17.

Each focused group included participants from a wide range of areas in Westchester, Rockland, and Fairfield Counties, from households with and without children, and from diverse ethnic backgrounds. African-Americans and Hispanics were included in each session.

The focused group discussions concentrated on current attraction visitation patterns, consideration of “unique” attractions, and the conceptualization of a Historic Prison Museum located at Sing Sing Prison. A detailed description of the proposed museum, including visuals where appropriate, was presented to the participants in order to gauge their reactions.

A copy of the moderator’s guide is attached as an appendix to this memorandum report.

THE FINDINGS

Overall Reaction

Initial reaction to the idea of a historic prison museum at Sing Sing is positive but guarded. Most say they would likely visit the museum – but they do not do so with enthusiasm or excitement. While they would go, they do not express excitement at the prospect. Lack of enthusiasm is also expressed in the recognition that the proposed museum would not be something you would re-visit. Many feel they would go once – but that they would not return.

“I would go to this because I love history and I would go to this because I would find it interesting.”

I think it would be interesting to see about the life in that prison. How do you survive from day to day, month to month.”

“I would definitely go see that because there’s nothing else like that in the area that I know of. I think that would be a really popular attraction.”

I don’t feel it’s going to have that much of a draw. It’s not something you’re going to go back to. You would go back to the museum of Natural History, back to the Planetarium. I don’t think this is something you’d go back to.”

“I don’t think it’s going to have the pull to draw people back again.”

“I wouldn’t hit it more than once.”

Prospective visitors feel that a visit to the Sing Sing Historic Prison Museum would appeal primarily to those in their middle years. They say that both older people and children would be likely to find such a museum disturbing.

“I think you’re going to draw more middle-aged people and higher-up teens.”

“It’s a non-children facility.”

“I think it could be emotionally disturbing to young children.”

“It would be a little iffy with anyone under the age of maybe 13 or 14.”

“I think it could be emotionally disturbing to young children.”

“I’d love to go. But I’m just saying to take kids, I don’t know.”

“I don’t think you’re going to get very many old people.”

“I think it would be too depressing, too stressful for seniors. Unless they were history buffs or had been involved in history.”

“I think the walking would be too much for them too.”

Prospective visitors have been drawn to other dark and different types of museum experiences in the past. While these visits do not engender happy responses, they do provide an intriguing and stimulating experience.

“You have to be ready for it. Otherwise, you may not be able to go through something like that. (Holocaust Museum in Washington.”

“I have found Civil War battlefields as moving as the Holocaust Museum depending on which ones you go to...there’s definitely a sadness, there’s a pall that comes over...”

“The Alamo moves me the same way. There’s just something very solemn, very quiet. People turn their radios off. People talk in hushed voices.”

“I think what would move me is seeing where JFK died because I saw it live...”

“I took a tour of a coal mine that was no longer active and it was interesting to see the conditions that the workers had to work in. They would turn off the lights down there and it was pitch black. You couldn’t see your hand in front of your face. It was pretty interesting to go down and think of the time that people spent down there – 14 hours a day.”

Civil War experiences: “It’s pretty intense to think about how things were back then and understand the differences in everything from medicines to housing to how they approached life and how hard it was to live like that.”

The Safety Issue

Initially, prospective visitors are also concerned with the location of a museum right at a working prison. They recognize that Alcatraz is a prison – but it’s a former prison, no longer housing inmates. Sing Sing will be a museum on the grounds of a maximum and medium security prison.

“Alcatraz is looking at the past, how conditions used to be in prisons.”

“Alcatraz. There’s nobody in there!”

Some are very concerned with the Sing Sing prison location and wish it were several miles away.

“I think the theory of the whole thing is fantastic...but not right at the prison.”

“I could see some people being nervous about being near an active prison.”

“If you could build it in a safer environment, why not.”

“They’d need an exceptionally good security system if they’re going to open up a museum in that place...”

Others feel that the location is fine because it makes the whole experience more real. Going to the prison will be half the excitement – something which wouldn’t be available in another place.

“I think you have to have it right there because that’s half the draw.”

“I’m sure it should be there. (at Sing Sing)”

“I’m not saying I’m a risk taker, but I just don’t think about those things. Life’s too short. That’s how I feel.”

“Personally, I think 50% of the draw is going to be because it’s connected to the prison.”

“I’m going to contradict what I said earlier. It’s the simple fact that it’s where it is.”

By the end of the session, most participants were comfortable with the idea of having the Historic Prison Museum at Sing Sing prison.

Interestingly, the concern for most prospective visitors with safety issues relates to other visitors rather than to the current inmates at Sing Sing. Likely visitors are worried that the museum will offer friends of inmates an easy way to enter the prison and remove their loved ones, using visitors as hostages. Such fears can be alleviated by having visitors screened to eliminate any weapons that might have been taken into the museum. With that caveat, often those who have concerns about safety are mollified and say they will visit the museum.

“What kind of checking are they going to do for the people that enter. I mean are you going to come through any kind of metal detectors?”

“Are they going to have some sort of metal detector or some sort of device so that ordinary people going to visit won’t have guns or something. How about somebody who’s going to visit this place is planning to break out a friend or something.”

“What kind of protection will the people have going through those gates?”

“How do you know who’s really going in there and what their motives are?”

“Like if I’m there and someone behind me grabs me with a gun and says, get my friend, Joe, out of the jail.”

Reasons for Visiting Sing Sing Historic Prison Museum

The reason given most often for interest in visiting the museum is educational in focus.

Prospective visitors believe that the Sing Sing museum experience will help them learn about the prison and its residents.

“I don’t know what the age would be – but if it’s done right, it could be beneficial to teach them something.”

“I think it would be an experience for some young people to go.”

“I think you would really have to watch the tone of what you present...you don’t want to glorify the crimes that were committed that put these people there.”

“I think (children) would be interested because you have jail cartoons, you have jail everywhere and this would be the real picture. This might correct some of the glamorizations they have in their heads that are dead wrong.”

Prospective visitors are most likely to be interested in the people who were incarcerated at Sing Sing during the different periods. They seem far less interested in the history of criminal punishment than in understanding who did what and why they were in prison.

“Is there anything in this museum that’s going to discuss why they were sent to Sing Sing? Types of crimes and what they were sent for.”

“When you go there and see it, it’s real...especially if you have information about people who have been in the jail before.”

“I would definitely want to know such as the famous people who were there over the years – the past 200 years.”

“Famous people that were there, what their crimes were or what their sentences were – if they got out.”

“You go there and see it and it’s real...Especially if you have information about people who have been in the jail before. Then it’s a real experience.

Essentially, the history of Sing Sing from the prospective museum visitor’s view is the history of the people who spent time there. Understanding those people and their crimes and their punishment will be the crux of the museum experience.

Some Exhibit Suggestions

Many prospective visitors would like to have guides in the museum to answer questions and direct them around the exhibits. Some would like to have these guides take them through the entire exhibit. Others would rather be free to roam the exhibits at their own pace.

“I think it would probably be better off in groups. Assuming that there’s a guide.”

“If you have a tour guide, there’s a possibility for some interaction there and maybe to ask questions other methods don’t address.”

“Having somebody live in there who can give lectures and take questions and things of that nature.”

“I want you to start me right here and I want you to talk to me and I want you to lead me through this place that you work in every day and I don’t work here.”

“I think it has to be built around a tour guide.”

But they would like to have more freedom in the way they access information. Tapes allow them the depth of information desired in different exhibits as well as the opportunity to take more or less time with a given exhibit. Speakers that turn on when you enter an exhibit area cause problems for people arriving at different times. Essentially, prospective visitors want to control the flow of information – to have as much or as little when and where they want it.

“Is someone talking to you or is there a narrative going on in the room so if you walk in you know what you’re looked at and what was going on.”

“I think (tape) is a good option. You rent the headsets.”

“With today’s technology, maybe they could have a series of headsets so that if you came in two or three minutes after it started, you put on the headset and it starts from the beginning. This way you don’t need a tour...But with technology today there is absolutely no reason they couldn’t have a dozen headsets and each one starts as you put in on in that room.”

“People like to go at their own pace. They’re going to arrive at different times so you’re going to be like half in the middle...”

“You have headphones and when you go near something, it actually triggers and right at that spot it starts from scratch at that point taking you.”

“(Do it) so that you have as much or as little as you were interested in or nothing if you only wanted to get the basics.”

“At Lyndhurst...it’s on tape and they give you a little bit and if you want more you push the button and you get more. There’s a little sign that says push two zero if you want to hear about this one.”

“I’d like to have tapes with different voices so that it gives you a feeling that it’s different people telling their story and what they saw.”

Given the focus on people, it is not surprising to find that many prospective guests would like costumed interpreters role-playing to communicate about the prison or at the least the voices of prisoners on tape. They also want to be involved by having a hands-on area where one can touch and feel the prison experience.

“Maybe at the beginning when you first enter have something with role playing. All kids can hear a tape, but if they can interact with it, actually see it. Talk to them immediately. ...it might motivate me to learn a little bit more.”

“That’s where they need to have the actual people doing some acting because that would grab you since it’s the first thing (Newgate Prison).”

“I’d like to have tapes with different voices so that it gives you a feeling that it’s different people telling their story and what they saw.”

Some feel that visiting the death house would be a terribly disturbing experience, not one they, or especially their children, would wish to experience at the museum. At the same time, **for others there is deep fascination with the death house at Sing Sing.** These prospective visitors want to see the chair itself, to learn about the people who were executed there, to read last letters from the condemned and from witnesses to the events. In short, for those who are interested, the death house will be a compelling exhibit, probably the most important and involving exhibit in the museum.

“I think it (death house) is going to be a sensitive topic...”

“Something like that (death house) we would discuss. My 18-year-old could go through, my 14-year-old could go through if she wanted to...my youngest one, I probably wouldn’t want her to go through.”

“I think they should keep that as part of the exhibit though because it’s part of the history.”

“I would think just the chair itself would be exhibit enough. Because it’s got its own history and it’s going to basically tell you how people were electrocuted and so on and how they went about doing it.

“I always find it interesting to see letters that were written at the time and to read their thoughts on things. Maybe if they’d have copies of letters that the inmates had written to their families especially in the death house – the last letter that they wrote before they died.”

“I think it would be appropriate to have the chair by itself there with the old-fashioned 1950 light. And when the people come in to visit, then like a bleacher section, looking at the chair... And then the explanation of the chair. What it’s for and what it’s going to be used for.”

“I think it would be interesting to do a re-enactment – not with somebody sitting in the chair, of course. But if you had the witness seats and just had all the lights turn out except for the light coming down on the chair and have the audio track playing just the formalities that the guards go through, last words and everything else. And obviously you’re not going to hear someone screaming or whatever. But it ends with the click of a switch being thrown and the lights dim and then the show’s over type of thing.”

“I think the death house is an effective climax to the tour. I don’t know if I would be interested in seeing current thing beyond that.”

“I think it would be very important (to get into the execution chamber).”

“They need a reproduction of the actual electric chair that people can really get to see – not through three inches glass or a little square that people have to look through.”

“It might be interesting to show any special procedures...like the sponge under the metal – people don’t realize that.”

“The death house is just what people think of when they think of Sing Sing. It’s the last place in New York State that an execution was carried out.”

According to our potential visitors, **Sing Sing is a famous prison, known by people far and wide often because of the movies** which were made at the prison and especially about the prison. There is interest in learning about the movies at the prison museum and perhaps in viewing clips from them during the course of the visit to the museum.

“You can go anywhere in the United States and mention Sing Sing and they’ll know what you’re talking about. More than likely. It’s very well known.”

“Right after Alcatraz, it’s the first name that will come up.”

(Should there be something about the movies?) “Absolutely,” Definitely.”

“I think that would be very interesting. Actually either at the very beginning or the very end.”

Visitor Services

Visitors would expect a gift shop from which they could make souvenir purchases. They would be interested in books about the people who had been incarcerated in Sing Sing as well as videotapes of CDs of the history of the prison and especially of the movies made about life at Sing Sing. Most anticipate that you could also buy the typical tourist merchandise such as tee shirts.

“(Books on) the famous people that were there, what their crimes were or what their sentences were. If they got out.”

“Famous people that were there.”

“A CD-Rom you’d put in your computer. That would be a great seller.”

“They could sell lots of tee shirts.”

“My dad went to Sing Sing and all I got was this tee shirt or something.”

“I escaped from Sing Sing’ or something like that.”

“Games and gameboards.”

Some prospective visitors express interest in some type of meal service facility at the museum and say they would like that to reflect the theme of the prison museum itself. Essentially, they would like to have the snack bar be done as a prison cafeteria with metal trays and tin cups.

“Will they have a snack or restaurant area? That might be something to consider. Keeps people a little longer. They take a break and then go back.”

“I think if they are really wanting people to come back then this has to be something where you’re going to stay more than a half hour, 45 minutes. If you’re going to stay for two hours, you want a cup of coffee.”

“I probably would stay there for at least three hours based on some of this – maybe more. And then I’ll want to get a cup of coffee, something.”

You could have a small mockup of a prison cafeteria. Make it seem as though you're eating in a prison cafeteria.”

“Metal trays and you walk down the (cafeteria line).”

“A lockup restaurant...a metal plate and a tin cup.

“The cafeteria could have a whole section on Sing Sing today. And that would give a reason to have the cafeteria.”

Section VI

PROJECTION OF VISITATION AND PHYSICAL PLANNING PARAMETERS

A successful visitor attraction must meet criteria related to location and accessibility of the site, programs offered and ticket pricing, and quality of marketing and operation. In addition, the size of available markets, the stability of the area's economy and the competitive context of the market place are important factors for understanding a project's market potential. The following visitation projections have assumed a well-planned, constructed and operated attraction that creates a unique educational and entertainment attraction in the Hudson River Valley. The projection assumes that the project will be aggressively marketed and will receive full community support in both the public and private sectors.

Some of the prerequisites for a successful project and assumptions underlying the visitation analysis follow:

Site – An authentic site that would enhance a visit to the Sing Sing Historic prison is required for success. The fact that the site for the museum is located adjacent to and one the prison grounds lends the greatest possible authenticity to the project. Because the prison is a large and complex facility, the identification of the museum portion of the prison facility should be made very clear.

Location/Access – The accessibility and visibility of the location is critical to its market success. Adequate parking provision and access to public transportation is crucial. Sing Sing Historic Prison is situated to have potentially excellent access from a number of transportation modes. In addition to personal vehicles, the MTA Metro-North Railroad provides a direct link to and from New York City, and Ossining station is walking distance from the proposed entrance to the Sing Sing Historic Prison. Additionally, water transportation may provide a unique mode of transport to the facility and become a value-added part of the visit to the project.

Program – A program is required that provides an enjoyable and repeatable visitor experience. It must be a premier area attraction for resident and tourist markets. A variety of exhibition techniques should be used to provide visitors with a unique and compelling educational experience. There must be sufficient attraction content to appeal to a diverse audience with a degree of subject interest, ages and education. An interpretive program must be prepared that fulfills

the market promise identified in this report such that the attraction must be of sufficient scale and attractiveness so as to compete competitively in the Hudson River Valley and Greater New York markets. The Sing Sing Historic Prison will be a unique attraction in the region, nationally, and perhaps internationally. This distinction will give it further visibility as a "must-see" attraction. However, it will have competition from several museums and other attractions within its resident market area.

Facility Pricing – The attraction's ticket prices must be in keeping with the breadth and quality of the visitor experience, and the time a visitor would spend at the Sing Sing Historic Prison. It would also have to be priced competitively with other comparable attractions that potential attendees visit. The actual ticket prices at the Sing Sing Historic Prison will depend on the final design of the project, the breadth and quality of the experience, and market response to the pricing analysis presented in Section V.

Facility Promotion and Management – An aggressive promotional campaign should be developed and implemented. This program should be targeted to prime visitor markets. It is assumed that the facility will be competently and effectively managed.

Market Area Population – The base of support for an attraction of this type is the local area population. This must be of sufficient size to provide a substantial base of project support. The Primary Market includes an estimated 1.2 million residents. The Secondary Market currently has a population of approximately 5.7 million residents and the tertiary resident market has approximately 3.4 million residents. The total resident market population is approximately 10.4 million. Moderate growth is expected in the resident markets. This analysis uses a five-year population projection, since it would be several years before an expansion of this type could open its doors, and given that the project is in its early planning stages. Overall, the Resident Market Areas are very populous and have demographic characteristics that are supportive of visitation to an attraction such as the Sing Sing Historic Prison.

Market Area Visitation – An active visitor market is also critical to market success. Westchester County is a popular destination for historical and cultural sites, countryside mansions, antiques and wineries, and outdoor recreation. Westchester County is heavily visited due to its array of visitor attractions, its proximity to major population centers, and the high number of corporations located in the county, which results in a high volume of business and meetings/convention visitation. Visitor spending in Westchester County is the highest of all counties in the Hudson River Valley, and it accounts for almost 40% of all visitor spending in the region. Tourism is a very important component of the county's economy, and the establishment of a County Office of Tourism attests to the importance of visitors to the county in generating revenue and providing employment for its residents. Additionally, the site is located a short distance from New York City, one of the most popular destinations in the country and the world, and it should be able to benefit to some degree from this location.

Consistency of Economic and Site Conditions – There will be not physical constraints to impede visitors to the facility, such as major construction activity. Changes in economic conditions such as a major recession or major environmental problems that would negatively affect operations and visitation will not occur in the forecast period. Further, it is assumed that the current downturn in the visitor economy due to the September 11 terrorism activity is a temporary condition.

ATTENDANCE PROJECTION

Preliminary projections of attendance potential are presented below, based on the size and characteristics of the available resident and visitor markets, the evidence of comparable national attractions and local attractions, the primary market research, an assumption that the planned Sing Sing Historic Prison program is unique and will be regarded as a top regional attraction. It is assumed in these projections that the following conditions will be met.

1. The size and design of the new facility and its exhibits will be appropriate to its market potential, and will serve to create a high quality, stimulating attraction with broad-based audience appeal and a distinctive image. The Sing Sing Historic Prison will be a unique attraction in the region and nationally. This distinction will give it further visibility as a “must-see” attraction.
2. An aggressive promotional campaign will be developed and implemented. This program will be targeted to prime visitor markets.
3. The admission price for the elements of the facility will be consistent with the recreational and educational value offered, and with current attraction admissions prices other comparable attractions, both locally and regionally. The attendance projection that follows assumes an adult ticket price in the range of \$7.00 to \$9.00.
4. The facility will be competently and effectively managed.
5. There will be no physical constraints to impede visitors to the facility, such as major construction activity.
6. Changes in economic conditions such as a major recession or major environmental problems that would negatively affect operations and visitation will not occur in the forecast period.

Data in Table VI-1 provides the projected range of total stabilized attendance at the Sing Sing Historic Prison based on the market evidence cited in this report, and the assumptions regarding the quality and size of the program to be developed, and an assumption of considerable marketing to residents and tourists. Stabilized attendance levels are typically achieved in the third or fourth year after opening. The range in the estimate of attendance is based on three factors. The first is simply the variation in market acceptance of the project. The second factor is the amount and

quality of marketing employed. The third is how well the conceptual exhibit program is translated in the future design and construction phases of the project.

Table VI-1
 Visitation Estimated Based on Estimated 2006 Population
 Sing Sing Historic Prison

	Estimated	Estimated		Visitation Range		
	<u>Market</u>	<u>Market Penetration</u>		<u>Mid-</u>		
	Size	Low	High	Low	Range	High
<i>Resident Market</i>						
Primary Market Area	1,244,100	1.5%	2.0%	18,662	31,772	24,882
Secondary Market Area	5,814,400	0.6%	1.2%	34,886	52,330	69,773
Tertiary Market Area	3,480,100	0.2%	0.6%	6,960	13,920	20,881
Subtotal	10,538,600			65,508	88,022	115,535
Average Market Penetration Rate		0.6%	0.8%			
		Low	High			
<i>Visitor (Tourist) Market</i>						
<i>As a Percent of total Attendance^{1/}</i>						
		35%	45%	32,581	63,555	94,529
Total ^{1/}				93,000		210,000
Mid-Range ^{1/}					152,000	

Source: ConsultEcon, Inc./Office of Thomas J. Martin.

1/ Rounded to nearest 1,000

Based on this analysis of the available market segments, a stabilized attendance range of 94,000 to 210,000 is estimated, with a mid-range of 152,000. The average penetration rate in the Resident Market Areas is less than one percent, which is not surprising given the size of the resident markets for the attraction. The experience of other prison museums and attractions in the region suggests that tourist market support in the range of 35% to 45% of total attendance is probable.

Seasonality of Visitation

The seasonality of visitation at the proposed Sing Sing Historic Prison will be determined primarily by the composition of its audience and regional weather patterns. Typical high visitation months are during the summer when tourism is at its peak, and residents of an area go on a larger proportion of their day-trips. During the spring and fall shoulder seasons, the facility will receive strong market support from school groups and group tours, and additional market support from convention and business travelers. Heritage visitors are also most frequent toward the end of summer and into September. The experience of visitor attractions nationwide indicates that those facilities with a larger percentage of visitors from tourist markets have the most highly peaked attendance patterns, while those which draw more from resident markets have a more even attendance pattern. Based on these conditions and the experience of other historic facilities in the region, the Sing Sing Historic Prison could expect to have moderately seasonal attendance patterns. The peak season at the facility will be August and September with June, July and October also strong months. Visitation will be lowest in the winter months. The spring and fall will have considerable attendance from school groups and other group travelers. Data in Table VI-2 shows the estimated monthly distribution of attendance at the facility.

Table VI-2
 Estimated Monthly Attendance Distribution
 Sing Sing Historic Prison

	Low Attendance Scenario		Mid-Range Attendance		High Attendance Scenario	
	Projected Seasonality	Total Attendance	Projected Seasonality	Total Attendance	Projected Seasonality	Total Attendance
January	2%	1,880	2%	3,040	2%	4,200
February	4%	3,760	4%	6,080	4%	8,400
March	6%	5,640	6%	9,120	6%	12,600
April	9%	8,460	9%	13,680	9%	18,900
May	10%	9,400	20%	15,200	10%	21,000
June	12%	11,280	12%	18,240	12%	25,200
July	12%	11,280	12%	18,240	12%	25,200
August	15%	14,1000	15%	22,800	15%	31,500
September	14%	13,160	14%	21,280	14%	29,400
October	10%	9,400	10%	15,200	10%	21,000
November	4%	3,760	4%	5,080	4%	8,400
December	2%	1,880	2%	3,040	2%	4,200
Total	100%	94,000	100%	152,000	100%	210,000

Source: ConsultEcon, Inc./Office of Thomas J. Martin

Early Year Attendance

During the first few years after opening, the project would be expected to achieve higher attendance based on excitement about the facility in the market. Attendance of 10% above stabilized attendance would be anticipated during that opening period. Data in Table VI-3 shows an estimated 10-year attendance projection.

Table VI-3
 Stabilized Attendance Projection
 Sing Sing Historic Prison

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Percentage of Stabilized Attendance	110%	105%	102%	100%	100%	101%	101%	101%	102%	104%
Mid-Range Projected Visitation	167,200	159,600	155,040	152,000	152,000	153,520	153,520	153,520	155,000	155,040

Source: ConsultEcon, Inc./Office of Thomas J. Martine

SING SING HISTORIC PRISON PHYSICAL PLANNING PARAMETERS

The information provided by data in Table VI-4 uses the estimated stabilized gate to prepare preliminary physical planning parameters for the Sing Sing Historic Prison. It should be emphasized that these are prepared for planning purposes only to test the facility sizing parameters from a market sizing perspective. Further refinement of facility sizing is necessary as the concept and project moves forward.

Table VI-4
 Facility Sizing Parameters
 Sing Sing Historic Prison

Annual Visitation	Mid-Range Attendance 152,000	
Peak period (29%) Aug-Sept. High Week (14%) of peak period	44,080 6,171	
Peak day (22%) in high week	1,358	
Length of Stay	(1.75 hr. stay – 30%)	(2.25 hr.) stay – 40%
Peak in-house population	407	543
Public Space Sizing	(20 sq.ft./ attendees)	(25 sq.ft./ attendee)
Range of Public Space Required	8,146 sf	10,182 sf
Facility Sizing	2.5 Times	3.0 Times
Total Facility Size Range	20,365 sf	30,547 sf
Peak Parking Demand ^{1/}	1.75 hr. stay 154 spaces	3.25 hr. stay 205 spaces

Source: ConsultEcon, Inc./Office of Thomas J. Martin

1/ Based on 90% auto usage during peak periods (bus usage is higher during the shoulder seasons fro school groups and tour groups). 2.5 persons per vehicle. Plus 5% turnover requirement. Does not include employee parking.

A facility-planning factor – “design day” – considers both the peak attendance days during the peak season, as well as the larger number of high attendance days that are not at the absolute peak. These might be peak days in a low week in

the summer or high attendance days during the year such as school vacations, or a rainy weekend day in spring or fall. Given this context, a Sing Sing Historic Prison sizing and parking analysis has been prepared that uses the estimate of visitation during a high week of the peak period of August and September and a strong day in that week (22% of average weekly attendance) to arrive at an appropriate “design day” attendance level for the proposed Sing Sing Historic Prison.

A factor of peak in-facility population of 30-40% of that day’s total attendance is then estimated given an estimated average length of stay of 1.75 to 2.25 hours. These factors provide an estimate of the “in-house” population on which to base the facility sizing analysis. At peak periods, the facility could have 407 to 543 visitors in-house.

The amount of total facility space that would be needed given the estimated public space would depend on a number of factors. These include:

- Exhibit footprint
- Staff size
- Utility/HVAC/Support space requirements
- Program of visitor amenities such as larger lobby, retail, food service, etc.
- Efficiency of design

While these factors are still in the planning stages and in part defined by the existing spaces set forth in the concept design for the facility, planning parameters of 20,400 to 30,600 total square feet is reasonable based on the ratios of public to total space that are common among museums and visitor attractions.

Sing Sing Historic Prison Parking Requirement

Based on the estimated peak-period attendance, an assumption of 2.5 passengers per car during the peak period, 90% auto usage and 5% turnover, 154 to 205 parking spaces are estimated to be required during the design day periods. This estimate does not include staff parking. Extensive planning for parking needs will be required, and additional, off-site parking might factor into the overall parking plans.

Visitation Estimate Summary

The attendance projections reflect an assumption of a unique attraction in Westchester County. The attendance projection assumes that the project will be aggressively marketed, competently operated, and will receive full community support in the public and private sectors. The stabilized annual attendance at the Sing Sing Historic Prison is projected to be 94,000 to 210,000 with a mid-range of 152,000. There would likely be an early-year surge in attendance due to market excitement about the project perhaps to 10% above the stabilized projection. Based on preliminary planning factors, and the experience of comparable visitor attractions, the total amount of public space needed for the project is between 20,400 square feet and 30,000 square feet based on 20-25 square feet per attendee.

At peak periods, the Sing Sing Historic Prison would have 407 to 543 visitors in-house. Based on the estimated peak-period attendance, an assumption of 2.5 passengers per car during the peak period, 90% auto usage and 5% turnover, 154 to 205 parking spaces are estimated to be under demand during the design day periods, not including staff parking. Parking demand by the Sing Sing Historic Prison visitors can be satisfied by both the new parking created for the facility, and by sharing parking spaces with nearby hotels, attractions and other public parking resources.

Section VII

OPERATIONAL MODEL

In this section of the report, three alternative operational models and accompanying financial analyses are presented that incorporate the findings of the market surveys and attendance projections presented above.

Approaches to Operations and Organization Design

Any viable operating approach for Sing Sing Historic Prison must be designed and scaled to reflect the visitation expected for the facility. Three possible approaches have been modeled to understand the potential net results of operations.

Model A presents a *stand-alone, year-round operation* in which the museum is completely responsible for all staffing, operations and promotional activities and must fund its operations through earned income, grants, contributions and, possibly, earnings from endowment. This model offers.

- The greatest amount of operational autonomy of the three models.
- The focus of the entire organization on the museum's mission.

Model A represents the conventional approach to creating a nonprofit museum. However, this stand-alone operation will require a full start-up budget (see discussion below) and the formation of a complete organization, including a governing board. This increases the up-front capitalization as executive staff must be carried from an earlier point in time. Further, an independent organization requires the greatest investment in personnel and infrastructure to develop unearned revenues, advertise and promote the museum and support the governance structure.

Model B represents a *year-round operation under a contract relationship*, such as the proposed relationship that has been explored in the past with Historic Hudson Valley, Inc. This approach would most likely include a management fee for services provided by the managing organization. Under this model:

- Some costs of operations are reduced, including especially the cost of expensive executive management talent.
- A coordinated approach to marketing and promotion is expected with the partnering organization.

Somewhat counterbalancing the economies of scale and more efficient allocation of expensive management talent are the inherent disadvantages of this type of arrangement. Chief among them are:

- A larger organization has responsibilities that may distract management from a high level of concentration on the goals and mission of the museum.
- A management fee arrangement, if it includes provisions for allocation of a portion of the managing organization's total overhead structure, may not provide a significant level of overall cost savings.

Finally, Model C considers *operation as part of an existing institution, with no management fee, on a nine-month basis*. In this model, the museum is operated through full merger into another organization. It further anticipates a seasonal operation that is consistent with the operating schedules of most historic attractions in the area. Advantages of this model could be:

- The need for a separate operating corporation and governance structure is eliminated.
- The museum would be opened and operated by an existing organization that is experienced in operating related facilities. Much of the opening year start-up expense is therefore avoided and the least possible duplication of operations is expected.

However, Model C presents some limitations as well.

- There is a risk that the vision and mission of the museum would be completely submerged within the concerns of the larger organization.
- Both the resources available to Sing Sing Historic Prison and the overall image of the facility could be determined by the successes or shortcomings of the partnering institution in its other programs and operations.

When reviewing Models B and C, it must be recognized that no partnership or contract management agreements currently exist, nor are negotiations currently underway. Therefore, the operational modeling presented below assumes that such contract operational partnerships or institutional partners can be identified and that management agreements can be developed with them.

A number of factors will eventually affect the choice of operating model, including.

- The financial outcomes of the alternative models.
- The support that the operational approach can provide for the total mission of the museum.
- The actual availability of potential partner organizations and the ability to negotiate workable relationships to implement each approach.

A. **Organization Design**

Table VII-1 presents the personnel required to operate Historic Sing Sing prison in a stable year of operation. As indicated above, the major differences among these designs is that the “Stand Alone” Model A requires a full executive staff, including an Executive Director, Marketing Coordinator, Finance Director and Development Director. In the two contrasting scenarios, the contracting or partnering organization provides senior staff in these areas, with a General Manager assigned to the site and subordinate staff within the larger organization’s departmental structure serving the direct needs of the museum.

As may be observed in this portion of the model, the financial implications of the three options presented are considerable, with total salaries and benefits ranging from \$507,000 under Model C to \$818,000 under the “Stand Alone” Model A.

Table VII-1
 Personnel Structures for Three Operating Models
 Sing Sing Historic Prison

Personnel	Model A: "Stand Alone"	Model B: "Contract Operation"	Model C: Institutional Partnership/9 Months
Executive Director/General Manager	95,000	50,000	50,000
Executive Assistant	38,000	N/A	N/A
Marketing/Group Sales Coordinator	55,000	30,000	30,000
Director of Finance	45,000	N/A	N/A
Bookkeeper	N/A	25,000	25,000
Secretary	25,000	25,000	25,000
Curator	45,000	25,000	25,000
Program/Education Director	32,000	32,000	32,000
Development Director/Membership Technician	65,000	N/A	N/A
Development Assistant	N/A	30,000	30,000
Shop Manager	32,000	26,000	26,000
Shop Clerks (1.5 FTE @\$10/hr.)	42,1120	42,120	30,780
Admissions Clerks (1.5 FTE @\$10/hr.)	42,120	42,120	30,780
Guides/Docents (4 on the floor at all times @\$12/hr.)	134,780	134,780	98,496
Security (2 FTE positions @\$9/hr.)	25,784	25,272	18,468

Benefits (@25% average for full time and guides)	141,696	94,446	85,374
Total Salaries and Benefits	\$817,992	\$581,742	\$506,898

Source: Herbert Sprouse Consulting, Inc.

N/A – Not applicable to this model.

Operating Results of the Three Models

Operating budget simulations have been developed for the three alternative management structures discussed above. The results for mid-range visitation estimates are presented in Table VII-2 (for the “Stand Alone” Model A) and Table VII-3 (for the “Contract Operation” Model B scenario). Table VII-4 presents the results of the “Institutional Partnership” Model C.

Table VII-2
Operating Model A: “Stand Alone”
Sign Sing Historic Prison

	Year 1	Year 2	Year 3	Year 4	Year 5
Attendance Factors					
Total Attendance	167,200	159,600	155,040	152,000	152,000
Weighted Average Admission Price	\$5.90	\$6.20	\$6.50	\$6.83	\$7.17
Per Visitor Shop Sales	\$5.00	\$5.20	\$5.41	\$5.62	\$5.85
Revenues					
Admissions	\$986,480	\$988,722	\$1,008,496	\$1,038,158	\$1,090,066
Net Shop Revenue (35% of gross sales)	292,600	290,472	293,460	299,214	311,182
Gifts, Grant and Sustaining Memberships	175,000	182,000	189,280	196,851	204,725
Special Events (2 events net of expenses)	40,000	41,600	43,364	44,995	46,794
Total Revenues	\$1,494,080	\$1,502,794	\$1,534,500	\$1,579,218	\$1,652,768
Operations Expense					
Total Salaries and Benefits (Table VII-1)	\$817,992	\$850,712	\$884,740	\$920,130	\$956,935
Program and Exhibit Renewal Expense	50,000	52,000	54,080	56,243	58,935
Marketing and Promotion Expense	300,000	312,000	324,480	337,459	350,958
General Admin. Exp. @15% of salaries & benefits	122,699	127,607	132,711	138,019	143,540
Professional Services	20,000	20,800	21,632	22,497	23,397
Cleaning/Gen. Maintenance (30,500 sf @ \$2/sf)	61,000	63,440	65,978	68,617	71,361
Energy (30,500 sf @ \$3/sf)	91,500	95,160	98,966	102,925	107,042
Contract Management Fee	0	0	0	0	0
Subtotal: Operations Expense	\$1,463,191	\$1,521,718	\$1,582,587	\$1,645,981	\$1,711,726

Contingency @10% of operations	\$146,319	\$152,172	\$1587,259	\$164,589	\$171,173
TOTAL Operating Expense	\$1,609,510	\$1,673,890	\$1,740,846	\$1,810,480	\$1,882,899
Net Surplus (Deficit) from Operations	\$(115,430)	\$(171,096)	\$(206,346)	\$(231,262)	\$(230,131)
Implied Endowment Required to Fund Deficit	\$2,308,600	\$3,421,900	\$4,126,900	\$4,625,200	\$4,602,600

Source: ConsultEcon, Inc./Office of Thomas J. Martin and Herbert Sprouse Consulting

Table VII-3
Operating Model B: "Contract Operation"
Sing Sing Historic Prison

	Year 1	Year 2	Year 3	Year 4	Year 5
Attendance Factors					
Total Attendance	167,200	159,600	155,040	152,000	152,000
Weighted Average Admission Price	\$5.90	\$6.20	\$6.50	\$6.83	\$7.17
Pet Visitor Shop Sales	\$5.00	\$5.20	\$5.41	\$5.62	\$5.85
Revenues					
Admissions	\$986,480	\$988,722	\$1,008,496	\$1,038,158	\$1,090,066
Net Shop Revenue (35% of gross sales)	292,600	290,472	293,460	299,214	311,182
Gifts, Grants and Sustaining Memberships	100,000	104,000	108,160	112,486	116,986
Special Events (2 events net of expenses)	40,000	41,600	43,264	44,995	46,794
Total Revenues	\$1,419,080	\$1,424,794	\$1,453,380	\$1,494,853	\$1,565,029
Operations Expense					
Total Salaries and Benefits (Table VII-1)	\$581,742	\$605,012	\$629,212	\$654,381	\$680,556
Program and Exhibit Renewal Expense	50,000	52,000	54,080	56,243	58,493
Marketing and Promotion Expense	250,000	260,000	270,000	281,216	292,465
General Admin. Exp. @15% of salaries & benefits	\$7,261	90,752	94,382	98,157	102,083
Professional Services	20,000	20,800	21,632	22,497	23,397
Cleaning/Gen. Maintenance (30,500 sf @\$3/sf)	61,000	63,440	65,978	68,617	71,361
Energy (30,m500 sf @\$3/sf)	91,500	95,160	98,966	102,925	107,042
Contract Management Fee	200,000	208,000	216,320	224,973	233,972
Subtotal: Operations Expense	\$1,341,503	\$1,395,163	\$1,450,970	\$1,509,009	\$1,569,369
Contingency @5% of operations	67,075	69,758	72,548	75,450	78,468
TOTAL Operating Expense	\$1,408,578	\$1,464,922	\$1,523,518	\$1,584,459	\$1,647,838
Net Surplus (Deficit) from Operations	\$10,502	\$(40,128)	\$(70,138)	\$(89,606)	\$(82,809)

Implied Endowment Required to Fund Deficit	\$0	\$802,600	\$1,402,800	\$1,792,100	\$1,656,200
--	-----	-----------	-------------	-------------	-------------

Source: ConsultEcon, Inc./Office of Thomas J. Martin and Herbert Sprouse Consulting

Table VII-4
Operating Model C: “Institutional Partnership/Nine Months”
Sing Sing Historic prison

	Year 1	Year 2	Year 3	Year 4	Year 5
Attendance Factors					
Total Attendance (reduced 8% for 9 month operation)	153,824	146,832	142,637	139,840	139,840
Weighted Average Admission Price	\$5.90	\$6.20	\$6.50	\$6.83	\$7.17
Per Visitor Shop Sales	\$5.00	\$5.20	\$5.41	\$5.62	\$5.85
Revenues					
Admissions	\$907,562	\$909,624	\$927,817	\$955,105	\$1,002,861
Net Shop Revenue (35% of gross sales)	269,192	267,234	269,983	275,277	286,288
Gifts, Grants and Sustaining Memberships	100,000	104,000	108,160	112,486	116,986
Special Events (2 events net of expenses)	40,000	41,600	43,264	44,995	46,794
Total Revenues	\$1,316,754	\$1,322,458	\$1,349,224	\$1,387,863	\$1,452,929
Operations Expense					
Total Salaries and Benefits (Table VII-1)	\$506,898	\$527,174	\$548,261	\$570,191	\$592,999
Program and Exhibit Renewal Expense	50,000	52,000	54,080	56,243	58,493
Marketing and Promotion Expenses	200,000	208,000	216,320	224,973	233,972
General Adm. Exp.@ 15% of salaries & benefits	76,035	79,076	82,239	85,529	88,950
Professional Services	20,000	20,800	21,632	22,497	23,397
Cleaning/Gen. Maintenance (30,500 sf @ \$1.5/sf)	45,750	47,580	49,483	51,463	53,521
Energy (30,500 sf @ \$2.5 sf)	76,250	79,300	82,472	85,771	89,202
Contract Management Fee	0	0	0	0	0
Subtotal: Operations Expense	\$974,933	\$1,013,930	\$1,054,487	\$1,096,667	\$1,140,533
Contingency @ 5% of operations	\$48,747	\$50,697	\$52,724	\$54,833	\$57,027
TOTAL Operating Expense	\$1,023,679	\$1,064,627	\$1,107,212	\$1,151,500	\$1,197,560
Net Surplus (Deficit) from Operations	\$293,074	\$257,832	\$242,012	\$236,363	\$255,369

Source: ConsultEcon, Inc./Office of Thomas J. Martin and Herbert Sprouse Consulting

Each of the budgets incorporates the following assumptions and estimates:

1. General Economic Parameters

- Year 1 of each model is based on 2001 dollar values.
- Unless directly tied to attendance, all expenses and revenues are subjected to an assumed 4% rate of general inflation for each year.
- Admissions prices are assumed to increase at an average rate of 5% annually.

2. Hours and Revenues

- Operations are based on a nine-hour operating, day, six days per week.
- The admissions charge for the mid-range case is a nominal \$8.00 for a full price adult in the first year. When discounted for children and seniors, school and tour groups and other promotional activities, the resulting average admission in that year is reduced to \$5.60. Table VII-5 resents the derivation of the pricing structure in detail.
- Gift shop net revenue is estimated at 35% of an average \$5.00 in purchases in the first year per visitor, based on a small retail shop and no on-site food service.
- The level of Gifts, Grants and Sustaining Memberships is varied among the models, with highest yields in Model A scaled against the costs of the dedicated Director of Development.
- Special Events revenues are based, in each case, on two annual special events designed to yield revenues to support operations and programs.
- No parking revenues are assumed.

Table VII-5
Prototype Pricing Structure
Sing Sing Historic Prison

Attendance by Type	Percent of Total Attendance	Admission Price	Weighted Average Admission Price
Adult	48%	\$8.00	\$3.84
Discounted Adult (promotions/repeat Coupons)	5%	\$4.00	\$0.20
Seniors	10%	\$6.00	\$0.60
Children	12%	\$4.00	\$0.60
Student Group	10%	\$3.00	\$0.30
Adult Group (including cruise, bus and train packages)	9%	\$4.00	\$0.36
Complimentary and Members	3%	\$0.00	\$0.00
Total	100%		\$5.90

Source: ConsultEcon, Inc./Office of Thomas J.. Martin and Herbert Sprouse Consulting

3. Personnel

- Senior management and professional staff salaries are presented in Table VII-1. Where two positions are shown (i.e., Executive Director/General Manager), the first, more expensive position is modeled for the stand-alone operations, while the less expensive, subordinate management position is allocated to the contract and partnership models.
- Hourly positions are compensated as follows for the first year of operation: docents at \$12/hour, admissions clerks and shop clerks \$10/hour, security personnel \$9/hour.
- Local practice includes partial benefits packages for hourly and seasonal personnel. Therefore, an average benefits load of 25% has been assigned to the entire payroll.
- Four docents are assumed to be on the floor at all times, due to the nature of the operation in the Historic Cellblock and the probable need for escorts to and from the Sally Port.

4. Operations

- Programs and Exhibitions expense assumes some special programs and an amount for special exhibits and exhibit renewal annually.
- Marketing and Promotion expense is scaled to reflect the expected size of the audience and efficiencies inherent in each of the organizational types that are modeled. In a sense, an unlimited amount of promotional budget could be spent, but there is clearly a point beyond which additional spending is not justified by the expected admissions yield. The marketing expenditure per visitor in Year 1 ranges from \$1.79 under Model A to \$1.30 under the “Institutional Partnership Model.” It is important to compare this level of expenditure to the expected average admission yield of \$5.90 in the same year. Under Model A, better than 30% of the expected admission yield per visitor is spent on advertising and promotion.
- General and Administration expense is calculated at 15% of wages, salaries and benefits overall.
- Cleaning and General Maintenance is a nominal estimate for 30,500 sf at \$1.50/f for the nine-month operation and \$2.00/sf for 12 months of facility use.
- Energy expenses have been extremely volatile in recent years and estimation is further reduced in accuracy by the current state of the design, which does not yet fully specify the HVAC systems. For this modeling exercise, the energy expense is based on \$3.00/sf for the facility (\$2.50/sf for the nine-month operating scenario in Model C).

- A contingency amount of 10% of the total operations budget is included for the “Stand Alone” Model and 5% for each of the other two models.

5. Expenses Not Modeled

The modeled budgets do not include provisions for debt service, renewal/replacement reserves (except for exhibits) or amortization of pre-opening start-up costs. For non-profit organizations, there remains some debate about best practices for funding depreciation, capital renewal and replacement. One approach, which advocates fully funding, building and equipment depreciation over a 20 to 30-year period, would result in additional charges to the operating budget of approximately 3% to 4% of the total capital replacement cost each year.

B. Sensitivity of the Analysis to Key Variables

It is also important to understand the impact that the ranges given for important planning parameters can have on the results of the operating simulations. To address this issue, a sensitivity analysis was performed that establishes High, Mid-Range and Low scenarios for each of the management models investigated. The analysis manipulates two variables – admissions price and total attendance – in each scenario. The ranges of these variables were established by the data and analysis presented in Section VI of this Report. All non-related assumptions were held constant for the analyst.

The results of this analysis are presented in Table VII-6, “Sensitivity Analysis Matrix for Three Operating Models.”

The three scenarios tested were:

- The Mid-Range scenario, which is documented above and in the tables in Section VI (\$8.00 adult admission, 152,000 stable visitation.)
- A Low Scenario, based on a \$7.00 base adult admission price (with all other prices scaled accordingly) and a stable visitation of 94,000.
- A High Scenario, which advances the base adult admission price to \$9.00 and anticipates stable visitation of 210,000.

Table VII-6
 Sensitivity Analysis Matrix for Three Operating Models
 Sing Sing Historic Prison

	Model A: "Stand Alone"		Model B: "Contract Operation"		Model C: "Institutional Partnership/9 Months"	
	Year 1	Year 5	Year 1	Year 5	Year 1	Year 5
Low Scenario: Low Attendance/\$7 Basic adult admission	(679,757)	849,083	(596,530)	(748,949)	(226,107)	(314,067)
Mid-range Scenario: Mid-Range Attendance/\$8 basic adult admission	(115,430)	(230,131)	10,502	(82,809)	293,074	255,369
High Scenario: High Attendance/\$9 Basic adult admission	543,003	492,807	668,934	640,129	898,832	920,472

Source: ConsultEcon, Inc./Office of Thomas J. Martin and Herbert Sprouse Consulting

Given the size of these ranges, the scenarios show considerable sensitivity to the values of these variables. The Low scenario produces very significant operating shortfalls in all three models.

The Mid-Range scenario produces positive operating results for the Institutional Partnership model and near break-even performance with deficits that may be manageable for the "Contract Management" scheme. The High scenario produces positive bottom line results for all three of the models.

C. Funding the Operating Cup

Models A and B reveal structural operating deficits that must be addressed through the provision of additional unearned funds if the project is to be managed under either of those models. Tables VII-2 and VII-3, in their presentation of deficit operating results, include a line item labeled "Implied Endowment Required to Fund Deficit." This line presents an estimate of endowment required to fund the shortfall in each year, based on spending an assumed 5% of the value of the endowment corpus to meet the deficit in that year. For the "Stand Alone" Model A approach, the required endowment to underwrite the structural deficit ranges from approximately \$4.8 to \$7.5 million, a very considerable sum in the context of this project. Endowment required for the "Contract Management" approach ranges between approximately \$800,000 and \$2.8 million.

Other approaches to funding the operating gap are necessarily more speculative. Many museums with positive local tourism and economic impacts receive direct operating appropriations from state, county and/or local government budgets. Others are directly operated by government agencies. Long-term corporate or philanthropic underwriting may offer an additional source of significant and predictable funding.

Of the prison museums surveyed for this study and described earlier in this Report, all but one received direct operating subsidies from a state or local governmental entity and, in some cases, public employees were used in direct operational roles. The single exceptions, Alcatraz Island, is operated by the National Park Service, a federal agency.

D. Pre-opening Startup Costs

One often overlooked requirement for a new museum is that an operating organization must be in place well before opening to develop the facility, design programs, begin the marketing cycle and prepare for daily operations. In the case of Sing Sing Historic prison, this need is especially pressing because the effort to develop the facility has been spearheaded largely by dedicated volunteers and officials who will not be able to guide the development of the organization indefinitely.

It is very apparent that the type of operation chosen for the museum will also have a considerable impact on the pre-opening expense budget. This is primarily because of the expense of the executive talent that will be required well in advance of opening. Table VII-7 presents example startup budgets for the project based on the requirements of each of the three operating models. The total cost of pre-opening activities, beginning approximately 18 months before opening to the public covers a wide range.

Table VII-7
 Pre-Opening Startup Budgets for Three Operating Models
 Sing Sing Historic Prison Museum

Pre-Opening Personnel	Months Hired Prior to Opening	Model A: “Stand Alone”	Model B: “Contract Operation”	Model C: “Institutional Partnership/ 9 Months”
Executive Director/General Manager	18	142,500	75,000	75,000
Executive Assistant	12	38,000	N/A	N/A
Marketing/Group Sales Coordinator	12	55,000	30,000	30,000
Director of Finance	12	45,000	N/A	N/A
Bookkeeper	6	N/A	12,500	12,500
Secretary	6	12,500	12,500	12,500
Curator	12	45,000	25,000	25,000
Programs/Education Director	12	32,000	32,000	32,000
Development Director/Membership Technician	18	97,500	N/A	N/A
Development Assistant	8	N/A	19,980	19,980
Shop Manager	9	24,000	19,500	19,500
Shop Clerks (1.5 FTE @\$10/hr.)	2	7,020	7,020	7,020
Admissions Clerks (1.5 FTE @\$10/hr.)	0.5	1,755	1,755	1,755
Guides/Docents (4 on the floor at all times @\$12/hr.)	2	22,464	22,464	22,464
Security (2 FTE positions @\$9/hr.)	1	8,424	8,424	8,424
Benefits (@25% average for full-time and guides)		128,491	62,236	62,236
Total Pre-Opening Salaries and Benefits		659,654	328,379	B328,379
Pre-Opening Expenses				
Executive Search and relocation (50% of top three salaries)		107,500	37,515	37,515
General Admin. Exp. (25% of salaries & benefits)		164,914	82,095	82,095
Advertising and Promotion (One full year budget)		300,000	250,000	200,000
Opening Events		50,000	50,000	50,000
Initial shop inventory (25% of first year gross sales)		209,000	209,000	192,280
Total Pre-opening Operating Budget		1,491,068	956,989	890,269

Source: ConsultEcon, Inc./Office of Thomas J. Martina and Herbert Sprouse Consulting

Under the “Stand Alone” approach, pre-opening costs total nearly \$1.5 million for the 18-month period. The “Contract Operation” approach of Model B reduces this requirement to approximately \$960,000 while, under the Institutional Partnership Model, the pre-opening startup budget is estimated at \$890,000.

Most approaches to capital fund raising campaigns for new museum facilities recognize these pre-opening costs as capital expenses. In this case, the range of better than \$500,000 between the management alternatives implies that the choice of a management approach may have a significant impact on the capital structure for the entire project.

E. Considerations in Choosing the Management Approach

For Sing Sing Historic Prison, the simplest approach would be to locate the operations of the facility within the structure of a partnering organization. It is not unusual to find similar operations housed within local government agencies, colleges, universities or other non-profit organizations with compatible missions. At present no candidate organization has been identified to fill this role, but the development of this report and the concept design plan may prove useful in further explorations of this possibility.

Employing a contract management approach also requires identification of an operating partner, although the provision of fees in compensation for the management of the facility may widen the field of interested parties. However, this approach results in deficit operations under all but the most optimistic of scenarios. Therefore, additional funding to underpin the financial shortfall must be identified before a management contract can be responsibly developed.

Although the “Stand Alone” option may produce the best expression of the Museum’s mission overall, the need for additional operating subsidy is clearly the highest under this operating scheme. Creating a new institution will incur the greatest startup and long-term costs. It may also entail the most risk of failure for the project, once built, as a newly formed organization must develop all of its operational, governance and programmatic structures simultaneously.

Section VIII

MARKETING BUDGET FOR THE SING SING HISTORIC PRISON

In the previous section, marketing budgets were discussed as components of the operating models and financial analysis. In this Section, further information is provided about marketing and promotion budgets as they apply to the proposed museum.

The costs of marketing and promoting Sing Sing Historic Prison to potential visitors can cover a broad range, depending on the specific media employed and the geography of the promotional efforts. The intent of the prototype marketing budget studies provided here is to identify cost-effective promotional programs that can be expected to generate the required level of visitation. As discussed in Section VII, almost unlimited funds could be spent to attract visitors to the site, but the relative return in admissions sales must be factored into the decision-making process in a realistic way.

Pre-Opening Campaign

Relying on the primary research and studies of marketing practice among attractions in the region and elsewhere, two prototypes advertising campaign structures are presented below. In Table VIII-1, a campaign for the pre-opening positioning of the museum is presented. The goals are to develop a broad awareness of the coming new attraction, publicize its opening date and events, and develop marketing relationships with tour and cruise partners and local tourism marketing consortia. For purposes of illustration, it is based on the \$300,000 budget modeled for the “Stand Alone” management approach presented in Section VII. Envisioned as an active campaign of six to eight months duration prior to opening, it consists of several features:

- A relatively high investment in initial strategy development, design and first-time placement costs.
- A focus on general awareness of the facility, its opening date and the development of its identity.
- A focus on general awareness of the facility, its opening date and the development of its identity.
- A broad demographic reach, coupled with an orientation to nearby, regional markets.
- Investment in marketing collateral publications with relevant local attractions and, especially, with cruise and tour partners.
- Very judicious expenditures for purchased print and broadcast media.

Table VIII-1
 Example Advertising Campaign Structures: Startup Campaign

	Startup Campaign		
	Promotional Purpose	% of Budget	Expenditure
Print Media			
Collateral Publications – Historic Sing Sing Prison only	awareness, branding, opening	10.0%	\$30,000
Collateral Publications – with marketing partners (historic attractions, cruise and tour partners)	awareness, branding, opening	10.0%	\$30-,000
Purchased print advertising – regional buys leveraged to editorial coverage and free placement	opening	10.0%	\$30,000
Cultivated Editorial Coverage Editorial Content – specialty history, travel and in-flight publications	awareness, opening	2.5%	\$7,500
Editorial content – general news outlets	awareness, opening	2.5%	\$7,500
Cultivated Broadcast Media Television – promotional appearances, talk shows, local and regional magazine shows	awareness branding opening special events	5.0%	\$30,000
Radio Spots – Public Service announcements	awareness, opening	5.0%	\$15,000
Purchased Broadcast Media	awareness, opening	10.0%	\$30,000

Joint Purchase Radio			
Targeted Regional Television and Cable Television	awareness opening	25.0%	\$75,000
General Design, Campaign Development Placement Services	Design, Copywriting	20.0%	\$45,000
Totals		100.0%	\$300,000

An Annual Campaign

In Table VIII-2, a second advertising campaign model is presented for a subsequent year-long campaign. Once open, new facilities typically develop strategies for directly addressing specific target market groups and regions over time, cultivating loyal audience members based on their interests and their propensity to identify with the goals and subject matter of the institution. Although it is far too early to specify target market segments for the facility in any detailed, meaningful way, it is possible to demonstrate how the annual advertising and marketing expenditures are redirected over time. In this prototype budget:

- Somewhat lower design and strategy costs are incurred.
- Low and no-cost editorial coverage in special interest, travel and lifestyle-oriented publications is cultivated and used strategically.
- Special events and their promotion become more central to developing and maintaining specific audience groups.
- As print collateral materials are developed and inventoried, a limited amount of additional funding is available for strategic print and broadcast media purchase.

Although the prototype provided here are based on the highest level budget figures in the preceding operational modeling analysis, they are scalable within the range covered by the three management models explored in Section VII. Further studies designed to identify target market groups logically follow a more complete development of the museum's content, exhibitions and operating organization.

Table VIII-2
 Example Advertising Campaign Structures: Continuing Campaign

	Startup Campaign		
	Promotional Purpose	% of Budget	Expenditure
Print Media			
Collateral Publications – Historic Sing Sing Prison only	awareness, branding, special events	7.5%	\$22,500
Collateral Publications – with marketing partners (historic attractions, cruise and tour partners)	awareness, branding, special events	10.0%	\$30,000
Purchased print advertising – regional buys leveraged to editorial coverage and free placement	seasonal awareness special events	20.0%	\$60,000
Cultivated Editorial Coverage			
Editorial Content – specialty history, travel and in-flight publications	seasonal awareness, special events	5.0%	\$15,000
Editorial content – general news outlets	seasonal awareness, special events	5.9%	\$15,000
Cultivated Broadcast Media			
Television – promotional appearances, talk shows, local and regional magazine shows	awareness special events	7.5%	\$22,500
Radio Spots – Public Service announcements	special events	5.0%	\$15,000
Purchased Broadcast Media	seasonal	10.0%	\$30,000

Joint Purchase Radio	awareness, special events		
Targeted Regional Television and Cable Television	seasonal awareness special events	20.0%	\$60,000
General Design, Campaign Development Placement Services	design, copywriting	10.0%	\$30,000
Totals		100.0%	\$300,000

Section IX
 ECONOMIC IMPACT EVALUATION

The development of the Sing Sing Historic prison will bring new visitors to and create economic benefits for the Village and Town of Ossining, Westchester County and the Hudson River Valley, New York State. The economic benefits resulting from the construction and operations of the Sing Sing Historic Prison will include the following:

- **Direct Construction Employment.** Construction of new architectural and exhibit elements at Sing Sing will result in a positive impact on the regional economy during its construction period. The impacts will include direct employment for construction workers during the construction period, and indirect and induced employment, wages and output.
- **Visitor Spending in the Local Economy.** The ongoing operations of Sing Sing Historic Prison as it attracts visitors from resident and visitor markets will form a stream of economic benefits to Westchester County, the Hudson River Valley region and New York State. Spending at Sing Sing Historic Prison will be largely net new to the region and a large portion of the spending will be net new to the State as well. Sing Sing historic Prison will help to attract new visitors to the Hudson River Valley Region who would otherwise not visit, contribute to longer stays in the area, and retain leisure expenditures of New York residents that would otherwise be made out-of-state.

In addition to the on-site spending at the facility (for tickets and gifts, for example), visitors will also spend for goods and services in conjunction with their visit. Off-site, or indirect, spending by Sing Sing Historic prison visitors would include overnight accommodations, food and transportation and retail purchases.

- **Direct Spending by Sing Sing Historic Prison.** As major businesses in Ossining, Sing Sing Historic Prison will play an active role in the local economy and help create jobs for local residents. Expenditures of the business will include expenditures for salaries and wages as well as for operating costs such as utilities, marketing, supplies and materials, office supplies, professional services and printed materials among many others.
- **Fiscal Revenue Generation.** Sing Sing Historic Prison will generate taxes for state and local government. Fiscal revenue impacts in the form of taxes generated include the following:
 - . Sales taxes from direct taxable visitor spending at Sing Sing Historic Prison and sales and hotel taxes on visitor spending outside the Historic Prison in conjunction with a visit.
 - . State income taxes of Sing Sing Historic Prison employees.
 - . Sales taxes from the personal spending of employed persons indirectly supported by project economic impacts.
 - . State income taxes of employees indirectly supported by project economic impacts.

This analysis presents all dollar amount in the current 2001 value of the dollar unless otherwise noted. This analysis is for Operating Model A and stabilized operations as outlined in Section VII for Sing Sing Historic prison under the year-round operations scenario. Economic impacts resulting from the other operating models presented in Section VII will differ from those presented here.

CONSTRUCTION PERIOD IMPACTS

Construction of the Sing Sing Historic prison will result in a one-time positive impact to the region's economy. The impacts will include direct employment for construction workers during the construction period, and indirect and induced employment, wages and output. Current development budget estimates are \$5.8 million in current construction costs.¹⁹

Data in Table IX-1 presents the results of construction impact analysis for New York State as a whole. The direct impact data is presented as direct expenditures for construction and the number of full-time equivalent person-years of

¹⁹ See Table IX-1 for an explanation of cost estimates and assumptions.

employment it would create. The total economic effect includes direct, indirect and induced expenditures in the regional economy, wages and income, and employment created during the construction period. (Construction is a one-time event, and not an ongoing project impact.) The following discusses the results of the construction impact analyses.

Table IX-1
 Calculations of Estimated Construction Period Impacts
 Sing Sing Historic Prison

<i>Projected Development Expenditures</i> ^{1/}	\$5,818,915		
<i>Direct Person-Years of Development Related Employment</i> ^{2/}	38		
<i>Estimated Average Annual Construction Wages</i> ^{2/}	\$47,100		
		Multipliers ^{3/}	
	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u> ^{4/}
Applicable Multipliers	1.6197	0.3481	11.4
	<i>Total Direct, Indirect & Induced</i> ^{5/}		
	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u> ^{6/}
Estimated Total Economic Impacts	\$9,424,897	\$2,025,564	60

1/ Development budget provided by DMCD Incorporated, *Sing Sing Historic Prison Interim Concept Design*. Note that this baseline budget provides preliminary costs for architectural, exhibition and fees only. Other potential costs such as parking and site work, and any needed structural stabilization, are not known at this time and have not been estimated.

2/ Construction wages are estimated to equal 40% of total hard costs less startup costs. All workers are assumed to have 30% overhead costs in addition to annualized salary. Year 2001 average construction wages based on data from the Westchester County Department of Planning Databook, 2001. 1999 average wages of \$44,856 adjusted upward an estimated 2.5% assumed annual inflation.

3/ See text for discussion of multipliers. Multipliers from a custom run of the Bureau of Economic Analysis' RIMS II Input-Output Model.

4/ IN jobs per million dollars of expenditures, multipliers are based on the 1997 share of the dollar, with jobs per million factored from 20001 to 1997 value.

5/ The total effects shown include the direct spending in New York for the development of the Sing Sing Historic Prison.

6/ Includes full-time and part-time jobs at a ratio similar to the mix of the economy as a whole.

All estimates are in current dollars. The economic model includes rounding that is reflected in individual results, factors and totals.

Source: ConsultEcon, Inc./Office of Thomas j. Martin

Direct Construction Employment

In order to estimate the direct jobs supported by Sing Sing Historic Prison, an estimate of 40% of in-state hard construction costs is allocated to wages and overhead. Jobs supported are based on prevailing construction wage rates. Construction wage data from the Westchester County Department of Planning were utilized to estimate average annual wages. The average 1999 construction wage of \$44,856 was adjusted for inflation in 2001 levels, resulting in an average 2001 construction wage of \$47,100. Based on these factors, direct construction activity from the Sing Sing Historic Prison is projected to directly support 38 full-time construction-related person-years of employment during the construction period. It should be noted that the estimated direct effects are subset of the estimated total economic impacts.

Total Construction Period Economic Impacts

Additional indirect employment is expected to be created during and subsequent to the development phase as well, due to secondary and induced economic impacts from the construction of the project. These are also one-time effects. The economic multipliers used in this analysis to estimate secondary and induced economic impacts were supplied by the Department of Commerce, Bureau of Economic Analysis from a customized computer run of their RIMS II Input-Output Model for the specific impact area of New York State.

Indirect and induced construction effects would occur in a single one- to two-year period following an initial direct expenditure. The one-time total economic impact (which includes direct, indirect and induced effects) of construction is estimated at the State level. The impacts would include \$9.4 million in expenditures (economic activity) in the State economy, of which \$2.0 million would be wages. The number of total jobs supported during the construction period is 60. Much of this statewide direct and indirect economic activity would occur in the Westchester County area, which is the locus of the initial expenditure.

ECONOMIC IMPACTS DUE TO ONGOING OPERATIONS

The ongoing operations of Sing Sing Historic Prison as it attracts visitors from resident and visitor markets will form a stream of economic benefits to Westchester County, the Hudson River Valley area and New York State. Much of the spending due to Sing Sing Historic Prison operations will be net new to the County as well as to the State. That is, it will include new economic activity for the economic units being evaluated. For visitors to the area and residents of the area, it will be an enhanced spending opportunity well beyond current offerings. This study evaluates new visitor spending and its total impacts (the “multiplier” effect) at the County level because Sing Sing is located in Ossining and Westchester County is indicative of project impacts at the local area in New York. The market study for Sing Sing Historic Prison indicates that there is an opportunity to attract new visitors to Westchester County and the Hudson River Valley as a whole to visit the project who would not otherwise visit. For others, a stay in the Hudson River Valley would be extended to visit Sing Sing Historic Prison. In addition, the project would retain spending of residents who would otherwise go elsewhere for an educational/entertainment experience comparable to Sing Sing Historic Prison.

This evaluation of the ongoing economic impacts of Sing Sing historic Prison first provides an estimate of the spending by Historic Prison visitors in conjunction with their visit. This spending is then evaluated to estimate the percentage of visitor spending that is net new to the county and the state, which are the geographic areas (or economic units) under evaluation. This “net new spending” is the first round of spending, which then “multiplies” through the area under consideration to form the total economic impact of the project. This analysis also provides an estimate of selected categories of direct fiscal revenues that would accrue to various government levels due to the project. In addition to visitor spending in conjunction with a visit, this analysis reflects the growth in the organization as a “business” in the Hudson River Valley area and the economic impact analysis includes the operating budget of Sing Sing Historic Prison as generating direct economic activity, as well as associated multiplier effects.

Estimates of Visitor Spending

The estimate of visitor spending that will occur at Sing Sing Historic Prison, or as part of a visit, is based on the projections of the feasibility study, secondary data, and an evaluation of the local pricing structure. Primary survey research of visitor spending patterns is available for New York through Empire State Development, Division of Policy and Research, as well as data from a Marist College tourism study of the Hudson River Valley. These sources provide reasonable estimates of spending patterns in the area, and provide a basis for the spending estimates. The sources used are:

- *New York State Seasonal Year End 1999 Domestic Travel Report*, May 2000, D.K. Shifflet & Associates Ltd.
- *Marist-Greenway Survey of Historic Sites*, 1997, Bureau of Economic Research School of Management, Marist College.

In addition to these data, the spending analysis takes into account the profile of visitors to other comparable attractions, and the type of trips that are made to a location such as Ossining. Data Table IX-2 provides New York State (but not including New York City) per capita travel leisure traveler spending data.

Table IX-2
 Average Daily Expenditures of Leisure Travelers²⁰
 in New York State Less NYC, 1999
 (per person daily)

Type of Expenditure	Overnight Trips	Day Trips	Total
Transportation	\$16.20	\$19.70	\$17.10
Food	\$16.70	\$20.90	\$17.70
Lodging ²¹	\$12.50	\$ -	\$9.60
Shopping	\$13.20	\$28.70	\$17.10
Entertainment	\$11.00	\$17.00	\$12.40
Miscellaneous	\$4.30	\$4.40	\$4.30
Total	\$73.90	\$90.70	\$78.20
Average Room Rate Paid ²²	\$74.30	\$ -	\$74.30

Source: DK Shifflet & Associates Ltd., NYS Seasonal Year End 1999 Domestic Travel Report (May 2000)

Note: Day trips include one-way travel of 50 miles or more away from home.

²⁰ Includes US residents on trips to places in New York State that included either an overnight stay, or travel to places 50 miles or more away from home.

²¹ Includes travelers reporting no expenditures for lodging (i.e., \$0.00)

²² Includes travelers reporting lodging expenditures of \$1.00 or more.

The above data set is used as the baseline for this analysis rather than the Marist College study, as it is from an ongoing study protocol that the State has maintained for many years. The firm that conducts the study has extensive New York State and national experience. The Marist College study helps place the DK Shifflet & Associates into perspective, and is supportive of the findings of the DK Shifflet study. Data from the Marist study was provided earlier in this report.

Table IX-3 is an analysis of potential off-site spending by Sing Sing Historic Prison visitors on the day of their visit. Also included in the estimated project operating budget that reflects on-site activities. Together, they represent the total direct economic activity generated by project operations. The operating budget of Sing Sing Historic Prison is detailed in the financial pro-formas of this study. All of this spending is considered “new” to the economies of Westchester County, the Hudson River Valley and the State of New York.

Due to the direct economic activity discussed above, additional indirect and induced economic activity occurs. The location in which the spending occurs effects the distribution of total economic activity by geographic area. In this analysis, Westchester County and the State of New York as a whole are the areas of evaluation. Data in Table IX-4 provide estimated distribution of visitor spending between Westchester County and other locations in New York State. The distribution of Sing Sing Historic Prison spending includes some out-of-state spending, and thus spending which is not included in the economic analysis.

The economic development purpose of the project is to stimulate new spending by visitors in the local economy, both within the Historic Prison and at other businesses in Ossining, Westchester County, and the wider region. The sources of the direct impacts of Sing Sing Historic Prison and the subsequent rounds of spending (multiplier effects”) in the local and regional economy are:

- The direct spending by Sing Sing Historic Prison in New York State through its operating budget.
- The spending of residents and visitors at Sing Sing Historic Prison for goods and services in conjunction with their first visit. This includes overnight visitors and day trip visitors. It should be noted that these expenditures are for the day of the visit to the Historic Prison only. To maintain a conservative analysis, visitor expenditures that occur on other days of the trip are not included in this evaluation.

Table IX-3
Calculations of Estimated Visitor Spending Potential
in a Stabilized Year Under a Mid-Range Attendance Scenario

<u>Estimation of Off-Site Spending</u>				
<i>Source of Visitation</i>	Day Trips	Hotel/Motel	Stay with Friends & Relatives	Total
Primary Market Area	100%	0%	0%	100%
Secondary Market Area	90%	5%	5%	100%
Tertiary Market Area	75%	15%	10%	100%
Visitor Market	15%	60%	25%	100%
<i>Estimated Distribution of Visitors by Origin^{1/}</i>	Day Trips	Hotel/Motel	Stay with Friends & Relatives	Stable Year Total
Primary Market Area	34,213	-	-	34,213
Secondary Market Area	39,247	2,180	2,180	43,608
Tertiary Market Area	7,830	1,566	1,044	10,440
Visitor Market	9,554	38,216	15,924	63,694
Total Attendance	90,844	41,963	19,148	
<i>Potential Current Year Per Person Spending (in addition to on-site spending at Sing Sing Historic Prison)^{2/}</i>	Day Trips	Hotel/Motel	Stay with Friends & Relatives ^{3/}	
Accommodations ^{4/}	\$0.00	\$35.27	\$0.00	
Food & Beverage	\$22.32	\$17.84	\$18.90	
Retail	\$30.65	\$14.10	\$18.26	
Transportation	\$21.04	\$17.30	\$18.26	
Entertainment/Recreation	\$18.16	\$11.75	\$13.24	
Other	\$4.70	\$4.59	\$4.59	
Total	\$96.87	\$100.84	\$73.26	
<i>Adjustment for Local Conditions in Westchester County (Percent of State less NYC Average) Plus Adjustment for On-Site Spending</i>	Day Trips	Hotels/Motels	Stay with Friends & Relatives	Adjusted Average per Capita
Accommodations		125%		\$12.17

Food & Beverages	95%	95%	95%	19.62
Retail	50%	75%	75%	13.81
Transportation	100%	100%	100%	19.65
Entertainment/Recreation	25%	25%	25%	3.94
Other	100%	100%	100%	4.66
Adjusted Average Per Capital				73.86
<i>Spending Matrix (in addition to on-site spending of Sing Sing Historic Prison) Adjusted for Local Conditions</i>				
	Day Trips	Hotel/Motel	Stay with Friends & Relatives	Total
Accommodations	\$0	\$1,849,921	\$0	\$1,849,921
Food & Beverage	\$1,926,366	\$711,012	\$343,867	\$2,981,245
Retail (in addition to Sing Sing)	\$1,392,261	443,682	262,272	2,098,215
Transportation	1,911,328	726,026	349,695	2,987,049
Recreation (in addition to Sing Sing)	412,342	123,245	63,395	598,982
Other	426,896	192,710	87,935	707,541
Total	\$6,069,193	\$4,046,597	\$1,107,164	\$11,222,954
<u>Estimation of Current Dollar Stable Gross Operating Expenses for Sing Sing Historic Prison^{5/}</u>				Future Stable Year
Gross Expenditures				
Total Salaries				\$676,296
Fringe/Benefits Costs				141,696
Other Operating Expenses				791,518
Total				\$1,609,510

1/ Does not precisely equal stabilized attendance due to rounding.

2/ 1999 spending data from DK Shifflet & Associates, Ltd., *New York State Seasonal Year End 1999 Domestic Travel Report* (May 2000, 1999 spending data updated by October 2001 consumer price index indicators to account for inflation between 1999 and 2001.

3/ Since specific estimates of YFR spending were not available, the average daily per capita expenditures for visitors were used.

4/ Lodging expenditures estimated for the day of visit at \$74.30 average room rate paid divided by an estimated average 2.25 persons per room for 1999.

5/ Based on estimated prepared by Herbert Sprouse Consulting. All estimates are in current dollars, Economic model includes rounding that is reflected in individual results, factors and totals.

All estimates are in current dollars, Economic model includes rounding that is reflected in individual results, factors and totals.

Table IX-4

Estimated Direct Spending Potential in Westchester County and Other Areas of New York State
 Under a Mid-Range Attendance Scenario

Estimated Operating Expenditures & Off-Site Spending	Prison Museum Spending	Off-Site Spending			Total
		Day	Hotel/Mot	Stay with	
		Trips	el	Friends & Relatives	
Accommodations		\$0	\$1,849,921	\$0	\$1,849,921
Food & Beverage		1,926,366	711,012	343,867	2,981,245
Retail		1,392,261	443,682	262,272	2,098,215
Transportation		1,911,328	726,026	349,695	2,987,049
Recreation (in addition to Sing Sing)		412,342	123,245	63,3956	598,982
Other		426,896	192,710	87,935	707,541
Total Off-Site		\$6,069,193	\$4,046,597	\$1,107,164	\$11,222,954
Gross Operating Expenditures					
Personnel	\$676,296				
Fringe/Benefits Costs	141,696				
Other Operating Expenses	791,518				
Total	\$1,609,510				
Estimated Distribution of Off-Site Visitor Spending		Day	Hotel/Mot	Stay with	
		Trips	el	Friends & Relatives	
Accommodations					
Westchester County			40%		
Other Locations in NY State			60%		
Food & Beverage					
Westchester County		60%	60%	60%	
Other Locations in NY State		40%	40%	40%	
Retail					
Westchester County		40%	40%	40%	
Other Locations in NY State		60%	60%	60%	
Transportation					

Westchester County	40%	50%	40%	
Other Locations in NY State	60%	60%	60%	
Recreation				
Westchester County	50%	50%	50%	
Other Locations in NY State	50%	50%	50%	
Other				
Westchester County	50%	50%	50%	
Other Locations in NY State	50%	50%	50%	
Distribution of Sing Sing Historic Prison Operations Spending				
Westchester County	55%			\$885,230
Other New York Counties	35%			563,328
Outside of New York State	10%			160,951
Total Sing Sing Spending	100%			\$1,609,510
Estimated Direct Spending				
Off-Site Spending in Westchester County	Day Trips	Hotel/Motel	Stay with Friends & Relatives	Total
Accommodations	\$0	\$739,968	\$0	\$739,968
Food & Beverage	\$1,155,820	\$426,607	\$206,320	1,788,747
Retail (in addition to Sing Sing)	\$556,905	\$177,473	\$104,909	839,286
Transportation	\$764,531	\$290,410	\$139,878	1,194,819
Recreation (in addition to Sing Sing)	\$206,171	\$61,623	\$31,698	299,491
Other	\$213,448	\$96,355	\$43,968	353,771
	\$2,896,874	\$1,792,437	\$526,772	\$5,216,083
Operations Spending by Sing Sing Historic Prison Museum, Westchester				
Off-Site Spending in New York but Outside of Westchester County	Day Trips	Hotel/Motel	Stay with Friends & Relatives	Total
Accommodations	\$0	\$1,109,953	\$0	\$1,109,953
Food & Beverage	\$770,546	\$284,405	\$137,547	\$1,192,498
Retail (in addition to Sing Sing)	\$835,357	\$266,209	\$157,363	\$1,258,929
Transportation	\$1,146,792	\$435,615	\$209,817	\$1,792,229
Recreation (in addition to Sing Sing)	\$206,171	\$61,623	\$31,698	\$299,491
Other	\$213,448	\$96,335	\$43,968	\$353,771

Total Off-Site Spending Outside of Westchester County	\$3,172,319	\$2,254,16	\$580,392	\$6,006,871
		0		
Operations Spending by Sing Sing Historic Prison Museum in Other New York Counties				\$563,328

All estimates are in current dollars. The economic model includes rounding that is reflected in individual results, factors and totals.

In all, \$11.2 million in current dollar off-site direct visitor spending is projected to occur annually due to the project, and Sing Sing Historic Prison is projected to spend \$1.45 million of its budget in New York State.

Location of Spending

The location in which visitors spend money associated with their visit to Sing Sing Historic Prison also has an effect on evaluation of economic impacts. That is, visitors on day-trips may stop for lunch in Westchester County, or outside of the county, overnight visitors may stay in accommodations in or outside of the county. An estimate of the economic impacts on Westchester County would focus on the direct spending that occurs in the county, while a statewide evaluation would use all visitor spending to estimate impacts. Data in Table IX-4 also provides an estimate of spending distribution. Westchester County will be the locus of visitor spending related to a visit to Sing Sing Historic Prison. Approximately \$5.2 million in current dollar off-site direct new visitor spending plus spending directly by the Historic Prison is estimated to occur in Westchester County annually. In other New York counties, \$6.0 million in direct spending from visitors and Sing Sing Historic Prison is projected to occur.

Net New Direct Spending in the Local and Regional Economies by Visitors to Sing Sing Historic Prison

The analyses in Table IX-5 and Table IX-6 use the visitor spending estimates, as refined to reflect on-site spending and local conditions, in estimating the percentage of visitor spending that would be net new to the local (County) and regional (State of New York) economies. This analysis distinguishes net new spending that occurs in the area's economy due to the project, from spending which might otherwise occur. This distinction accounts for "substitution" of spending at Sing Sing Historic Prison for other spending opportunities in the County or State. "On-site" spending by Sing Sing Historic Prison for its operations is assumed to be net new to the geographic areas under consideration. This assumption is made because Sing Sing Historic Prison will be a substantial and unique cultural opportunity in these areas. Of the visitor spending associated with a visit, the majority is attributed to net new spending at both the County and regional levels.

Table IX-5

Estimated Economic Impacts of Sing Sing Historic Prison in Westchester County, new York
 in a Stabilized Year under a Mid-Range Attendance Scenario

	Estimated Total Spending	Total Spending Adjusted to Retail Margin	Estimated Percent Net New to Westchester	Estimated Net New Spending in Westchester	Estimated Net New Spending in Westchester Adjusted to Retail Margin
Total In-County Sing Sing Operation Spending	\$885,230	\$885,230	100%	\$885,230	\$885,230
<i>Estimated Direct Off-Site Spending in Westchester County</i>					
Accommodations	\$739,968	\$739,968	90%	\$665,972	\$665,972
Food & Beverage (Retail Margin 75%)	1,768,747	1,341,560	90%	1,609,872	1,307,404
Retail (Retail Margin 50%)	839,286	419,643	90%	1,075,337	470,460
Transportation (Retail Margin 25% on gasoline which is 75% of total)	1,194,819	522,733	90%	1,075,337	470,460
Entertainment/Recreation	299,491	131,027	90%	269,542	117,925
Other	353,771	353,771	90%	318,393	318,393
Total Off-Site	\$5,216,083	\$3,508,703		\$4,694,475	\$3,157,833
Total Direct On-Site and Off-Site Spending	\$6,101,313	\$4,393,934		\$5,579,705	\$4,043,063
Economic Impacts-Westchester County, NY	<i>Multipliers^{1/}</i>				
	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u>		
Accommodations	1.6160	0.3716	13.3		
Food & Beverage	1.6736	0.3421	20.7		
Retail	1.6239	0.3584	17.1		
Transportation	1.6215	0.3455	11.5		
Entertainment/Recreation	1.6233	0.3537	18.9		
Other	1.6233	0.3537	38.9		

<i>Estimated Economic Impact</i>	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u>
Accommodations	\$1,076,210	\$247,475	8
Food & Beverage	2,025,541	413,053	23
Retail	613,313	135,360	6
Transportation	762,851	162,539	5
Entertainment/Recreation	1,628,422	354,816	17
Other	516,848	112,616	5
Total	<u>\$6,623,185</u>	<u>\$1,425,859</u>	<u>64</u>
Plus Net New Direct Effects			
<i>Total In-County Sing Sing Operations Spending^{2/}</i>	\$885,230	\$676,296	19
<i>Net new direct in-County Spending</i>			
Accommodations	\$665,972	\$153,341	5
Food & Beverage	1,207,404	346,217	14
Retail	377,679	83,355	4
Transportation	470,460	100,240	3
Entertainment/Recreation	117,925	25,695	1
Other	318,393	69,317	3
Total Direct	<u>\$4,043,063</u>	<u>\$1,354,317</u>	<u>49</u>
<i>Total Direct, Indirect & Induced</i>	\$10,666,248	\$2,780,176	113

1/ See text for discussion of multipliers, which are from a custom run of the Bureau of Economic Analysis' RIMS II Input-Output Model

2/ Employment includes full-time and part-time positions.

All estimates are in current dollars. The economic model includes rounding that is reflected in individual results, factors and totals.

Source: ConsultEcon, Inc./Office of Thomas J. Martin

Table IX-6
 Estimated Economic Impacts of Sing Sing on New York State
 in a Stabilized Year under a Mid-Range Attendance Scenario

	Estimated Total Spending	Total Spending Adjusted to Retail Margin	Estimated Percent Net New to State	Estimated Net New Spending in New York	Estimated Net New Spending in New York Adjusted to Retail Margin
<i>On-Site Spending</i>					
Total Sing Sing Operation Spending in New York	\$1,448,559	\$1,448,559	100%	\$1,448,559	\$1,448,559
<i>Estimated Direct Off-Site Spending</i>					
Accommodations	\$1,849,921	1,849,921	75%	\$1,387,441	\$1,387,441
Food & Beverage (Retail Margin 75%)	2,981,245	2,235,934	75%	2,235,934	1,676,950
Retail (Retail Margin 50%)	2,098,215	1,049,108	75%	1,573,661	786,831
Transportation (Retail Margin 25% on gasoline which is 75% of total)		1,306,834	75%	2,240,286	980,125
Recreation	598,982	262,055	75%	449,237	196,541
Other	707,541	707,542	75%	530,656	530,656
Total Off-Site	\$11,222,954	\$7,411,392		\$8,m417,215	\$5,558,544
Total Direct On-Site and Off-Site Spending	\$12,671,512	\$8,859,951		\$9,865,774	\$7,007,103
Economic Impacts in State of New York	<i>Multipliers^{1/}</i>				
<i>Total Direct, Indirect & Induced</i>	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u>		
Accommodations	1.9383	0.5803	20.3		
Food & Beverage	1.9789	0.5438	30.6		
Retail	1.8998	0.5845	26.7		
Transportation	1.8998	0.5845	26.7		
Admissions/Memberships	1.8765	0.5578	28.0		
Other	1.8765	0.5578	28.0		
<i>Estimated Economic Impact</i>	<u>Expenditures</u>	<u>Earnings</u>	<u>Employment</u>		

Accommodations	\$2,689,277	\$805,132	25
Food & Beverage	3,318,517	911,926	46
Retail	1,494,821	459,903	19
Transportation	1,862,042	572,883	24
Admissions/Memberships	3,087,030	917,637	42
Other	995,776	296,000	13
Total	\$13,447,463	\$3,963,480	169
Plus Net New Direct Effects			
<i>Total In-State Sing Sing Operations Spending^{2/}</i>	\$1,448,559	\$676,296q	19
<i>Net new direct in-State Spending</i>			
Accommodations	\$1,387,441	\$415,380	13
Food & Beverage	1,676,950	460,825	23
Retail	786,831	242,079	10
Transportation	980,125	301,549	13
Entertainment/Recreation	196,541	58,423	3
Other	530,656	157,740	7
Total Direct	\$7,007,103	\$2,312,193	88
<i>Total Direct, Indirect & Induced</i>	\$20,454,566	\$6,275,773	257

1/ See text for discussion of multipliers, which are from a custom run of the Bureau of Economic Analysis' RIMS II Input-Output Model

2/ Employment includes full-time and part-time positions.

All estimates are in current dollars. The economic model includes rounding that is reflected in individual results, factors and totals.

Source: ConsultEcon, Inc./Office of Thomas J. Martin

Input-Output modeling theory also indicates that only the retail margin component of a producer's price (the portion captured by the local retail or restaurant establishments) will have a significant impact on the local economy. The remaining components of the producer's price go to manufacturing, transportation and warehousing costs outside of the economic unit being analyzed. Therefore, margins were estimated based on the Bureau of Economic analysis input-output commodity composition tables of personal consumption expenditures in producer and purchaser prices, along with the consultant's judgment. The application of retail margins to consumer expenditures in certain expenditure categories has the effect of lowering the amount of new dollars that are recirculated in the economic unit under evaluation for a given consumer expenditure.

Data in Table IX-5 and IX-6 summarize the estimates of net new spending as corrected for retail margins for Westchester County and the State of New York, respectively. For instance, a larger percentage of the spending will be net new in Westchester County than in the State as a whole. That is, a smaller percentage of the visitor spending that occurs due to Sing Sing Historic Prison is estimated to replace other spending that would otherwise occur at the local level, than at the statewide level. There will be some diversion of visitation from other locations in New York to Sing Sing Historic Prison.²³ Given these analyses and assumptions, the project is estimated to create \$4.0 million in net new expenditures in Westchester County, and \$7.0 million in net new expenditures to the State. It is important to note that these analytical estimates are derived in order to estimate economic impacts of the operation of the project on these distinct geographic areas, but that they are based on the same stream of total visitor spending. These separate impact estimated are not additive in nature. Spending in Westchester County is a subset of State of New York spending.

Total Economic Impact of Operations of Sing Sing Historic Prison

The annual impact to the local (County) and regional (State) economies, as noted above, is from direct (first round) net new spending to a given area, as corrected for retail margins, and subsequent rounds of spending within the economies. The total economic effect includes direct, indirect and induced expenditures; wages and income; and employment in the regional (defined as the State), and local (define as Westchester County) economics.

Data in Table IX-5 and Table IX-6 present the estimates of total ongoing annual impacts of Sing Sing Historic Prison Westchester County and the State of New York.

- **Countywide Impacts** – As the multiplier effect works its way through the local (Westchester County_ economy, the net direct economic activity due to the Historic Prison will generate a total annual impact

²³ It should be noted that while there will be some diversion of visitation from other New York attractions, Sing Sing Historic Prison will attract new visitors to New York, extending the stays of some visitors and retaining some resident trips, thus creating opportunities for visiting multiple attractions, and using the State's retail, restaurant and other visitor infrastructure.

estimated at \$10.7 million in expenditures, of which \$2.8 million in wages will be generated, and 113 total jobs²⁴ will be supported in the county.

- **Statewide Impacts** – As the multiplier effect works its way through the local (Westchester County) economy, the direct economic activity due to the Historic Prison will generate a total annual impact estimated at \$20.5 million in expenditures, of which \$6.3 million in wages will be generated, and 257 total jobs will be supported in the State. At the statewide level, these effects include the support of jobs and economic activity in and outside Westchester County. However, the Westchester County economic activity estimated above will not be fully a subset of the statewide economic activity, as there is assumed to be some transfer of economic activity from other regions of the State to Westchester County, as some substitution of spending from other areas to Westchester County is assumed along with net new spending.

The economic multipliers used in this analysis are from a customized computer run of the RIMS II Input-Output Model to the specific impact areas analyzed in this analysis. The RIMS II Regional Multiplier model was created by, and is maintained by the U.S. Department of Commerce, Bureau of Economic Analysis.

Summary of Economic Impacts

Data in Table IX-7 provides a summary of the direct on- and off-site, indirect and induced economic impacts of the project. It should be noted that total impacts include impacts in New York and Westchester County. The total economic impacts in Westchester County are estimated at \$10.7 million annually, with 113 jobs supported. For the state as a whole, including Westchester County, total economic impacts of \$20.5 million are estimated, with 257 jobs supported. The economic impacts of off-site visitor spending will be most greatly felt at the local and County level. Prime beneficiaries of visitors to Sing Sing Historic Prison will include local providers of goods and services, such as restaurants, retail establishments and lodgings operators. An increase in visitor traffic to the local area will also increase demand for goods and services associated with a visit.

Fiscal Revenue Impacts

Data in Table IX-8 presents a projection of certain taxes generated to local and State government. These estimates are in the following categories:

- Sales taxes from visitor spending outside Sing Sing Historic Prison in conjunction with a visit.
- Sales taxes from the personal spending of Historic Prison employees.

²⁴ Total jobs include full-time and part-time employment, assumed to be in ratio with the distribution of jobs between actual full-time and part-time for the county as a whole.

- Sales taxes from the personal spending of employees indirectly supported by the net new spending due to the project.
- State income taxes of Sing Sing historic Prison employees.
- State income taxes of employees indirectly supported by the net new visitor spending generated due to the project.

These categories are not exclusive, and they represent a mix of direct and indirect economic activity. Nonetheless, this analysis shows levels of fiscal revenues are associated with the project.

The direct sales adjusted for retail margin from the Sing Sing Historic Prison gift shop are estimated at approximately \$299,214 in current dollars in a stable year. This represents approximately \$20,200 in sales taxes to the two taxing jurisdictions.

Table IX-7
Summary of Estimated Economic Impacts of Sing Sing Historic Prison^{1/}
on the Local and State Economies
in a Stabilized Year Under a Mid-Range Attendance Scenario

<i>Visitors to Sing Sign Historic Prison</i>	152,000	
<i>Direct Spending by Sing Sing and Off-Site Visitor Spending</i>		
	Total Spending in Westchester County	Off-Site Spending in New York but Outside of Westchester County
Sing Sing Operating Expenditures	\$885,230	\$563,328
<i>Estimated Direct New Off-Site Spending^{2/}</i>		
Accommodations	\$739,968	\$1,109,953
Food & Beverage	\$1,788,747	\$1,192,498
Retail	\$839,286	\$1,258,929
Transportation	\$1,194,819	\$1,792,229
Recreation (In addition to Sing Sing)	\$299,491	\$299,491
Other	\$353,771	\$353,771
Total Off-Site	\$5,216,083	\$6,006,871
Total Direct On-Site and Off-Site Expenditures ^{2/}	\$6,101,313	\$6,570,199
<i>Total, Direct, Indirect and Induced Effects of Visitor Spending</i>		

On Expenditures, Earnings and Employment on the Geographic Areas Evaluated

	Westchester County^{3/}	State of New York^{3/}
Expenditures	\$10,666,248	\$20,454,566
Earnings	\$2,780,176	\$6,275,773
Employment (permanent) ^{4/}	113	257

^{1/} All estimates are in current dollars for a stable year.

^{2/} Not all off-site spending is new. Some would occur in other locations without the influence of Sing Sing Historic Prison.

^{3/} Westchester County economic impacts are a subset of the total State of New York impacts.

^{4/} Employment includes full-time and part-time jobs.

The economic model includes rounding that is reflected in individual results, factors and totals.

Source: ConsultEcon, Inc./Office of Thomas J. Martin.

Table IX-8

Estimated Tax Revenue Generation Potential of Sing Sing Historic Prison in Selected Categories
in a Stabilized Year Under a Mid-Range Attendance Scenario

	Westchester County Sales and Hotel Taxes	Other NY Counties Sales And Hotel Taxes	State Sales And Hotel Taxes	State Income Taxes
<i>Sales Taxes Generated by Visitor Net New Direct On-Site</i>				
<i>Retail Expenditures</i>				
Sales Taxes Sing Sing Retail Receipts ^{1/}	\$8,228		\$11,969	
<i>Sales Taxes Generated by Visitor Net New Direct off-Site Expenditures</i>				
Net New Taxes fro Total Visitor Direct Off-Site Hotel				
Expenditures ^{1/}	\$38,293	\$27,471	\$55,498	
Net New Taxes from Total Visitor Direct Off-Site Hotel				
Expenditures ^{1/ 3/}	\$42,951	\$64,427	\$130,155	
Net New Taxes from Total Visitor Direct Off-Site				
Restaurant Expenditures ^{1/}	\$44,271	\$29,514	\$89,437	
Total	\$133,744	\$121,412	\$287,059	
<i>Taxes Generated by Sing Sing Employee Wages and</i>				
<i>Salaries Under the Plan</i>				
State Income Taxes ^{4/}				\$23,603
Sales Taxes ^{5/ 6/}	\$3,348	\$2,232	\$8,116	
<i>Taxes Generated by Net New Employee Wages and</i>				
<i>Salaries Due to Sing Sing (Multiplier Effects)</i>				
State Incomes Taxes ^{4/ 7/}				\$195,422
Sales Taxes ^{5/}			\$67,194	
Total Taxes by Category	\$137,092	\$123,644	\$362,368	\$219,024
Total State Taxes			\$518,392	

^{1/} Sales are assumed by Sing Sing Historic Prison to be \$5,62 per capita in a stable year. State sales tax at 4%.

Additional Westchester County sales tax of 2.75%. Note that there is an additional tax of 0.75% in White Plains, and 1.25% in Yonkers, Mount Vernon and New Rochelle. These municipal sales taxes are not factored into the analysis.

^{2/} Retail and restaurant visitor spending at an 8% sales tax rate, with half of all revenue going to the County and half going to State Government. Retail and food spending is only partially net new, with the percent net new estimated per

Table 6. Transportation is assumed to be largely gasoline taxes, and for analytical purposes, these are assumed to be “retail” sales.

^{3/} Occupancy Tax of 3% applied in Westchester County in addition to 6.75% State and County sales tax.

^{4/} Assumed marginal State income tax rate is 3.49% based on a comparison of wages earned in New York State versus Income Taxes collected.

^{5/} Based on 40% of income spent on goods and services, of which 75% is in taxable categories.

^{6/} Spending by Sing Sing Museum workers is estimated at 60% in Westchester County and 40% in other New York counties.

^{7/} The marginal tax rate is multiplied by the difference between the total wage and salary effect less the estimated direct salaries and wages.

All estimates are in current dollars. The economic model includes rounding that is reflected in individual results, factors and totals.

Source: ConsultEcon, Inc./Office of Thomas J. Martin

Off-site expenditures by visitors to Sing Sing Historic Prison would be a major generator of sales and hotel taxes. Such spending has the potential to generate fiscal revenue of over \$133,000 annually to Westchester County, early \$120,000 to other counties in New York, and \$287,000 to the State of New York.

Sing Sing Historic Prison employees will also generate tax revenues. An estimate of the tax generation potential through income taxes and sales taxes of Historic Prison employees (who are technically an indirect effect of the direct spending at Sing Sing Historic Prison) has been made. These equal approximately \$37,300 to various levels of government.

In addition to these readily identifiable tax revenue sources, the project will help to grow the New York economy. In turn, the additional economic activity will generate new tax revenues. Based on the estimated new wages and salaries (in addition to employees of Sing Sing Historic Prison) there is the potential to generate approximately \$263,000 in income and sales taxes to New York State annually.

In total, this analysis has identified the potential to generate over \$840,000 in taxes annually to various jurisdictions in New York State due to the operation of Sing Sing Historic Prison. Of this total, approximately \$580,000 annually is estimated to accrue to New York State due to taxes levied on income and sales, including hotel taxes. This, in addition to the more than \$20 million in annual economic activity estimated to be generated in New York State by the operations of Sing Sing Historic Prison, presents a substantial opportunity for New York State to enhance its economic development goals through the support and promotion of tourism.

Expansion of the Regional Tourism Economy and Infrastructure

Beyond its potential to create direct and multiplier effects on the local and State economies, Sing Sing Historic Prison will contribute to the expanded profile of Ossining and Westchester County as a visitor destination thus benefiting the area overall. It could provide a destination for inducing “pass-through” travelers to stop in the local area. Sing Sing Historic Prison has the potential to be a stimulus to tourism revenues in Ossining and the county, making a significant contribution to the area’s tourism goals and economy while educating, inspiring and entertaining both its residents and visitors. It will provide a stimulus to the local economy (especially to local businesses, as presented previously) and support regional and statewide tourism growth goals and initiatives, while generating significant fiscal benefits for New York State and its localities.

Specific tourism development opportunities in Sing Sing historic Prison can seek to capitalize on already-established tourism programs and the Hudson River Valley’s existing reputation as a visitor destination. Because of the geographical distance between a number of the region’s visitor destination points, there exist a number of opportunities to establish landside and waterside transportation solutions to help link Sing Sing Historic Prison to other area attractions. Because of the scenic nature of the Hudson River Valley, these tours would be a value-added part of the

visitor experience. As well, the tours could be mutually reinforcing among individual visitor attractions by helping to grow attendance at the attractions themselves and interest in the region overall.

Comparable projects to Sing Sing Historic Prison have provided significant direct and indirect economic development to their regions. Sing Sing Historic Prison can share these potential benefits. These can be summarized as follows:

- Bring new visitors and attendant spending.
- Create new direct and indirect jobs.
- Create new business development opportunities while enhancing the profile of existing local businesses.
- Help create critical mass of attractions to create a “destination attractions” tourism economy.
- Have the potential to become “First Day” attractions in their areas, thus contributing to attendance at other attractions.

Socioeconomic Benefits for Sing Sing Historic Prison

Sing Sing Historic Prison has the potential to be a popular new attraction for Ossining and the wider region. It has the potential to attract new visitors to the local area and to the State, and to extend the stay of existing visitors. In addition, a project of this type will retain, in the local economy, the discretionary spending of area residents who otherwise would spend out of the area or out-of-state for comparable or competitive educational attractions. New visitors attracted by the facility would also spend for food, accommodations, transportation and retail goods and services in the local area and in other areas in New York State. This new spending translates into new jobs and income for area residents and new tax revenues. The ongoing economic benefits of a major tourist attraction of this type can be substantial. Finally, Sing Sing Historic Prison will provide an opportunity for area residents to experience and better understand the history and importance of this major institution and its place in the community.