



# *LEISURE TRAVEL STUDY- ESSEX, FRANKLIN, & HAMILTON COUNTY REGIONS*

## 2016 COUNTY VISITOR PROFILES & REGIONAL RETURN ON MARKETING INVESTMENT ANALYSIS

August 2017

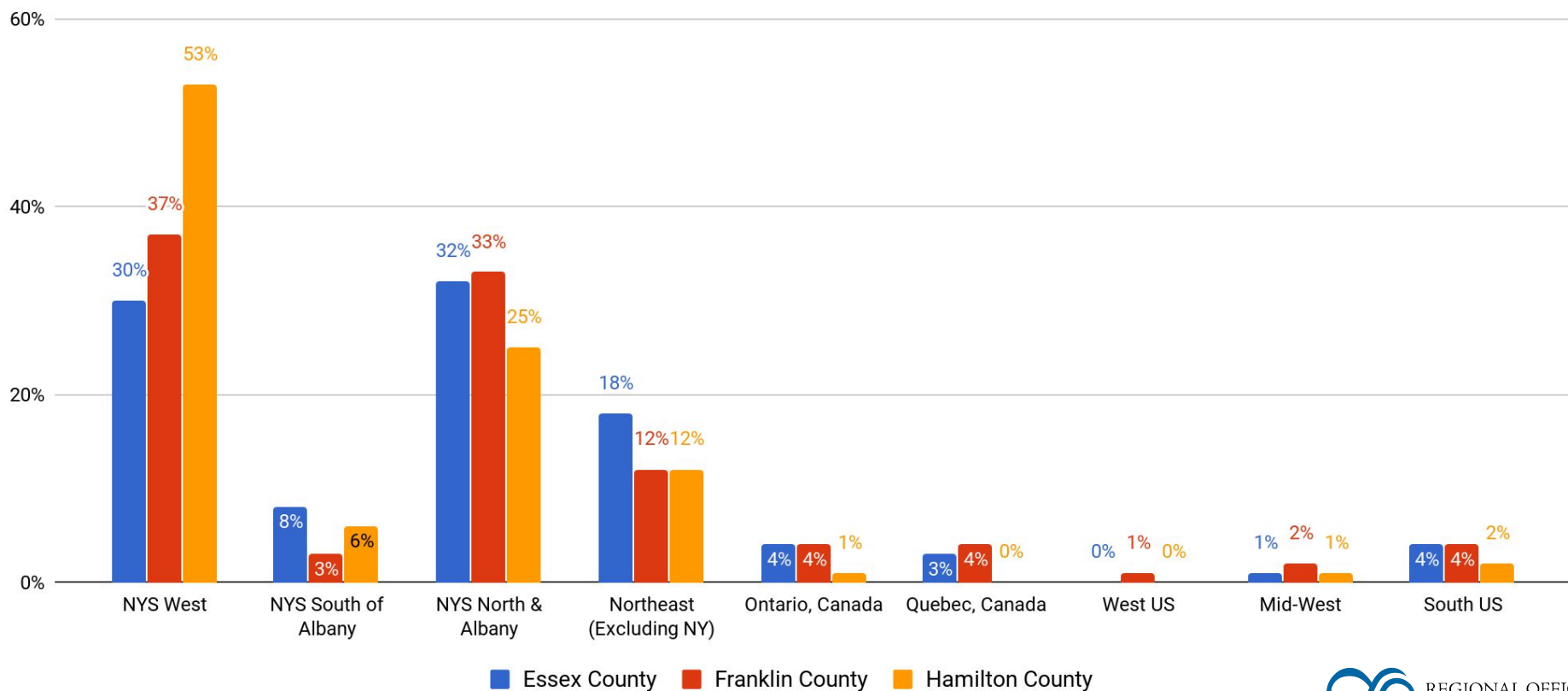
# Project Background & Methodology

- PlaceMaking researchers have been conducting this study for Essex County for thirteen years
- In keeping with ROOST's growing regional representation of Adirondack tourism assets, the 2016 survey also included a baseline measure of Franklin and Hamilton counties
- Comprehensive visitor data by the three counties follow, as well as a regional return on marketing investment analysis

# Project Background & Methodology

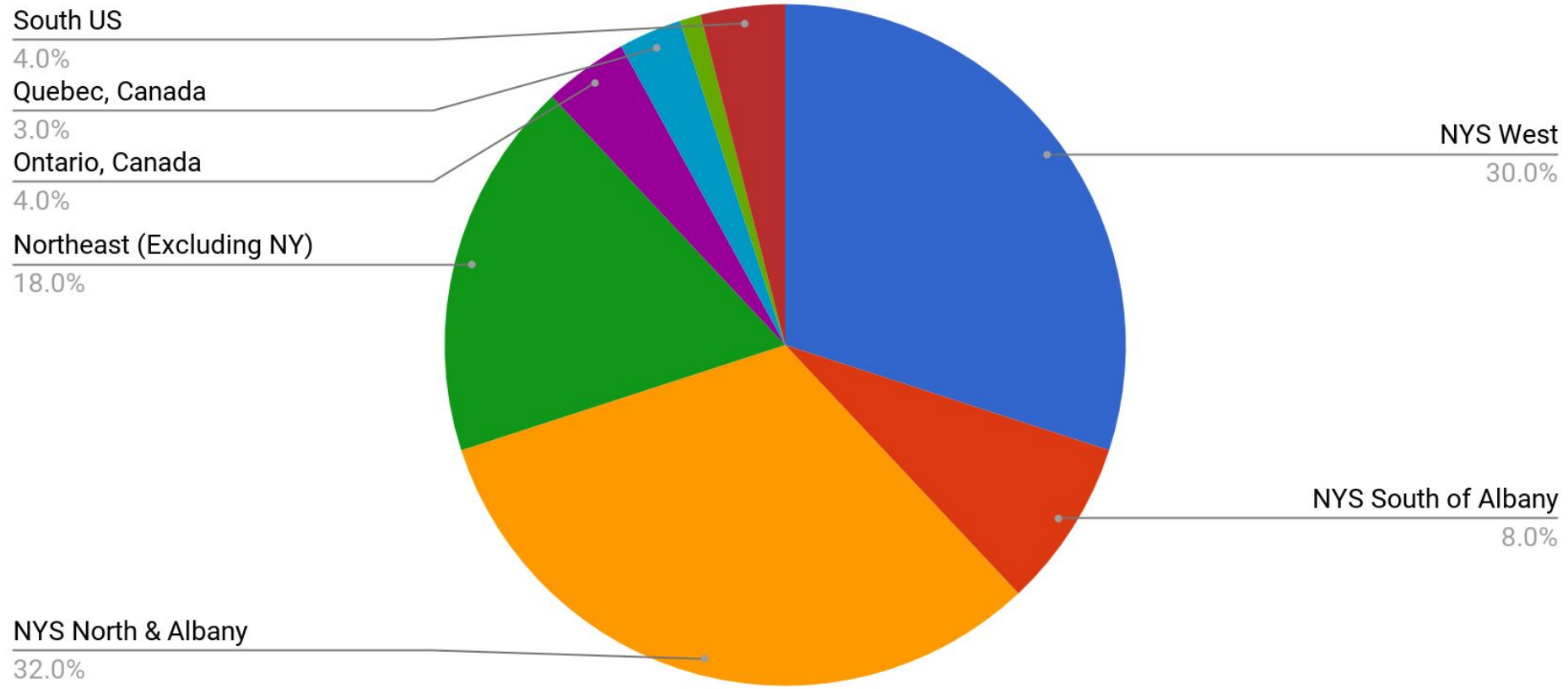
- Survey conducted in January 2017 of leisure visitors to Essex, Franklin & Hamilton County region in 2016
- 25,000 visitors invited to take survey via email and FaceBook; approximately 5,000 responded for a nearly 20% response rate
- Includes 3,397 who visited primarily Essex County, 826 who visited primarily Franklin County and 2,130 who visited primarily Hamilton County

# 2016 Visitor Profile- Area of Residence

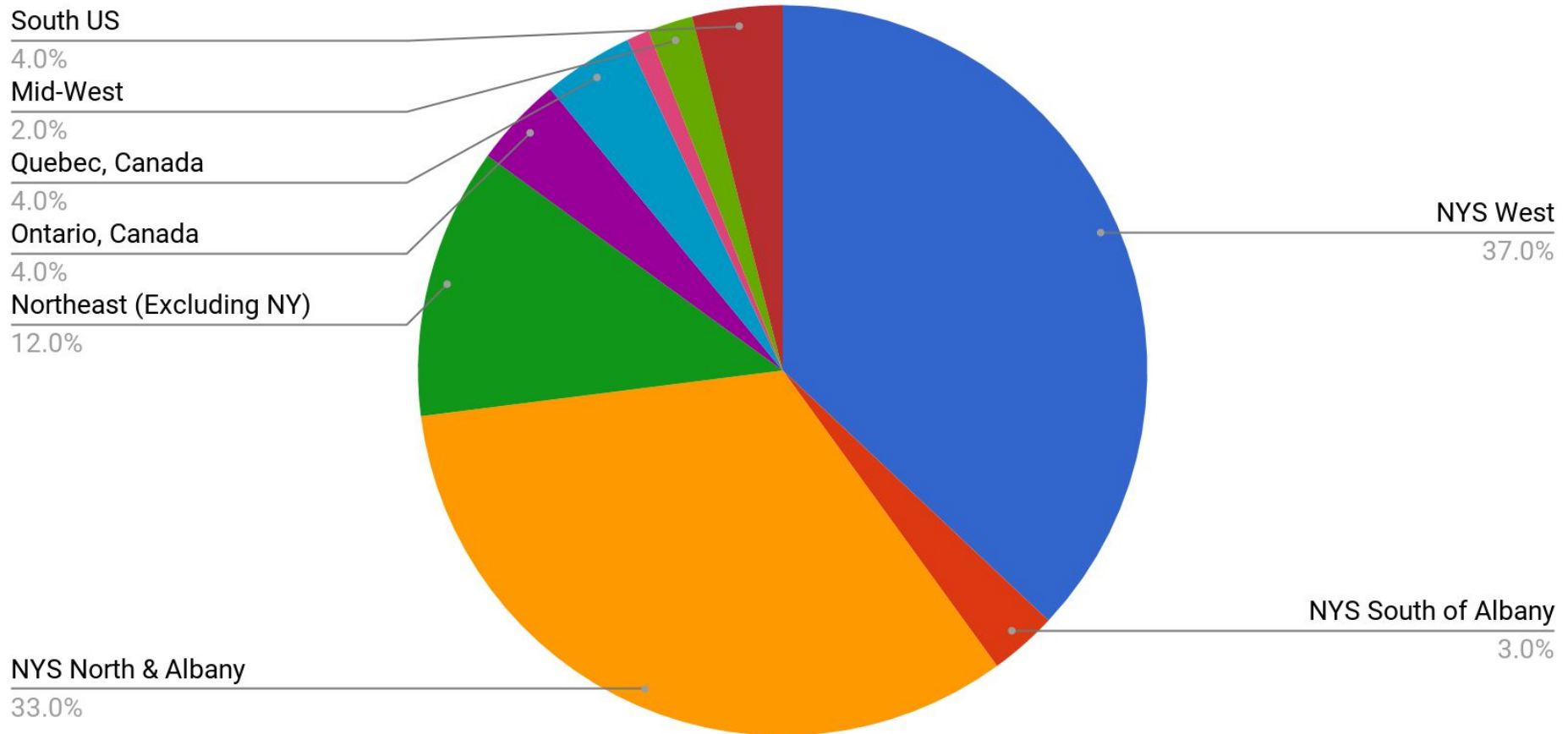




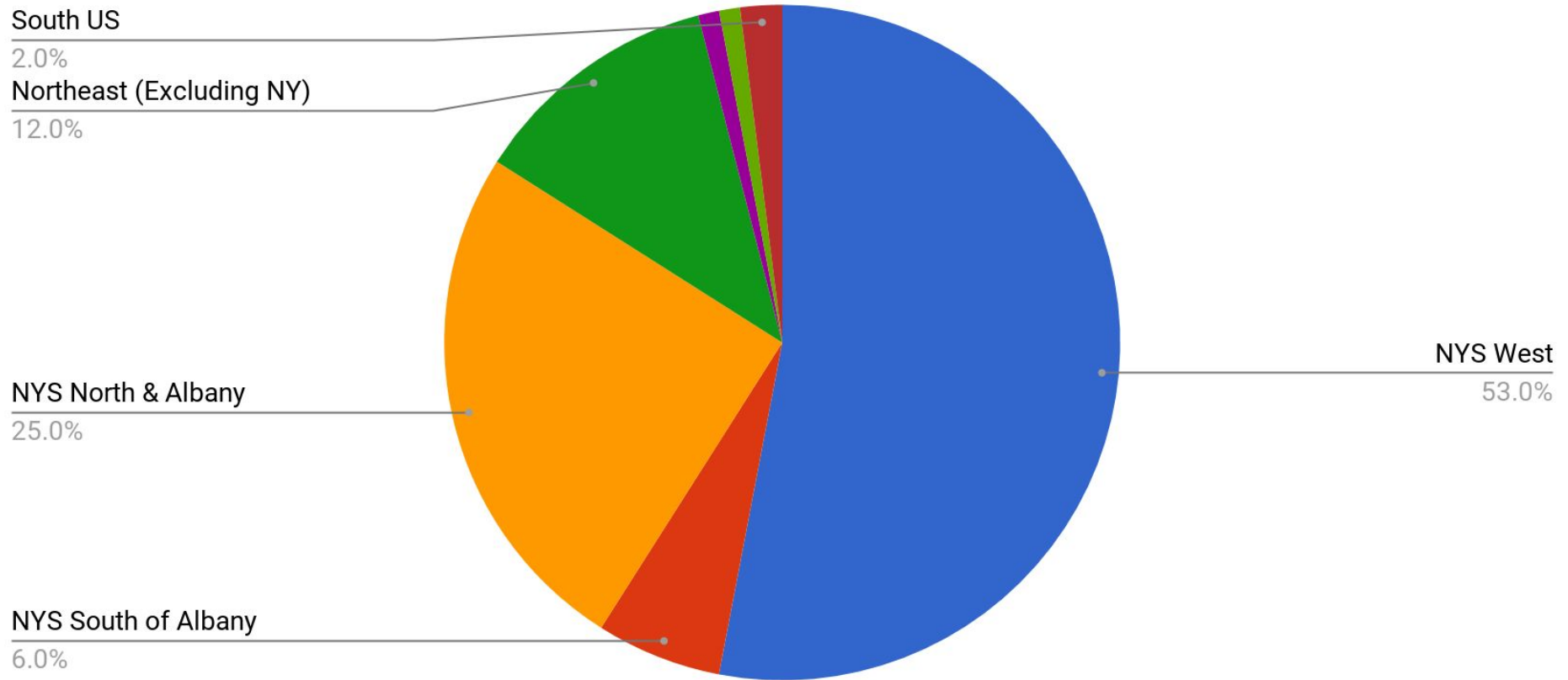
# 2016 Essex County Visitor Profile- Area of Residence



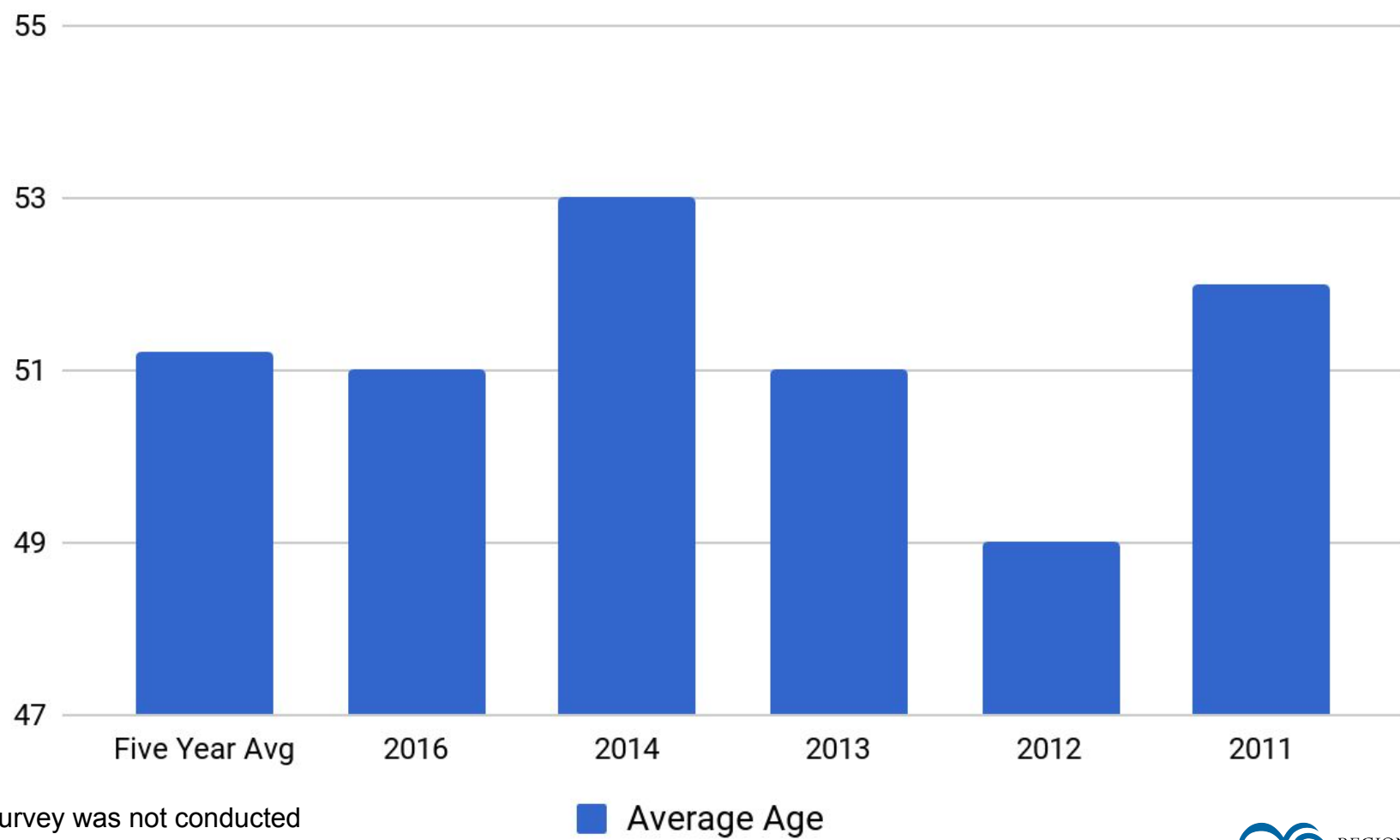
# 2016 Franklin County Visitor Profile- Area of Residence



# 2016 Hamilton County Visitor Profile- Area of Residence



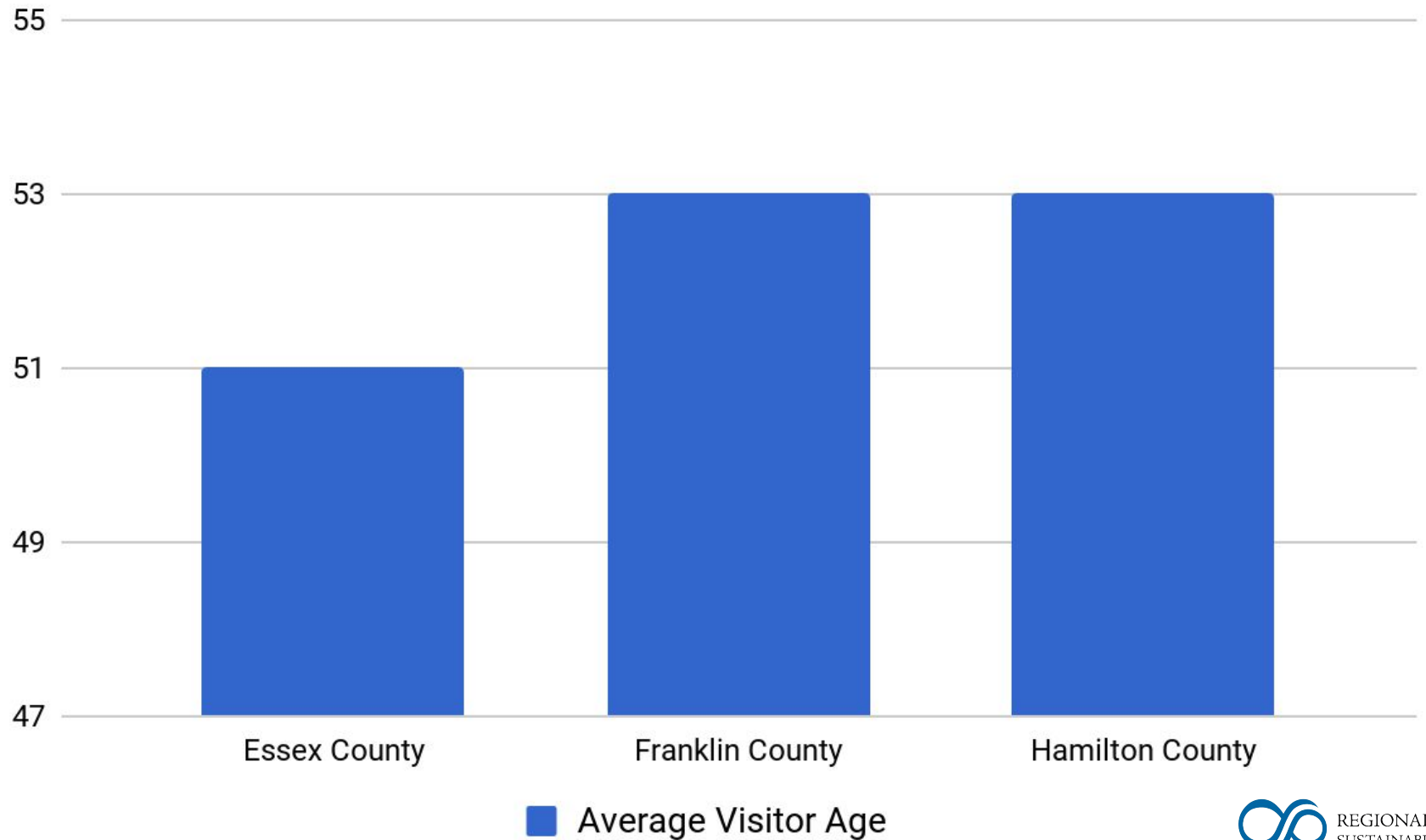
# Essex County Five Year Average Age\*



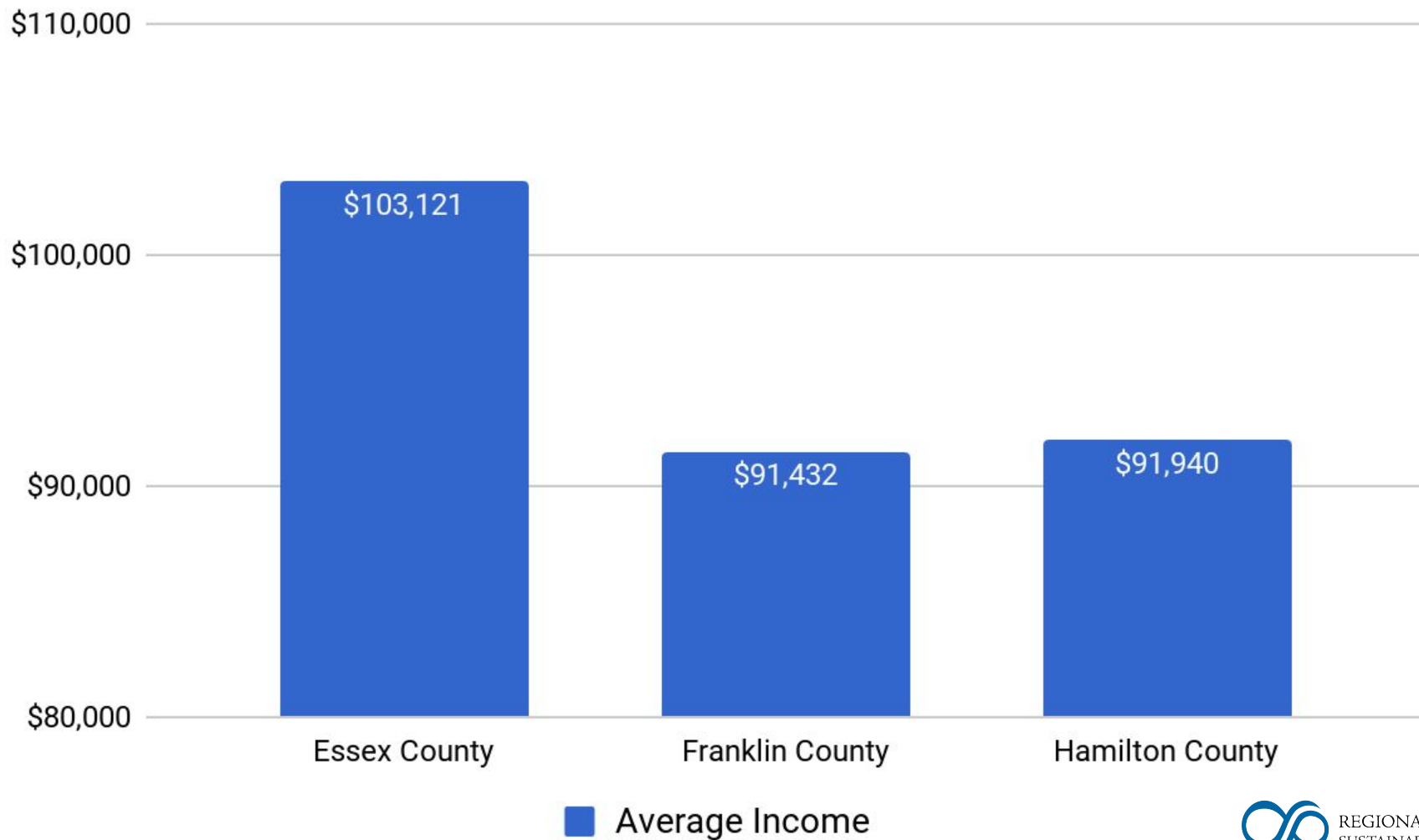
\* 2015 Survey was not conducted



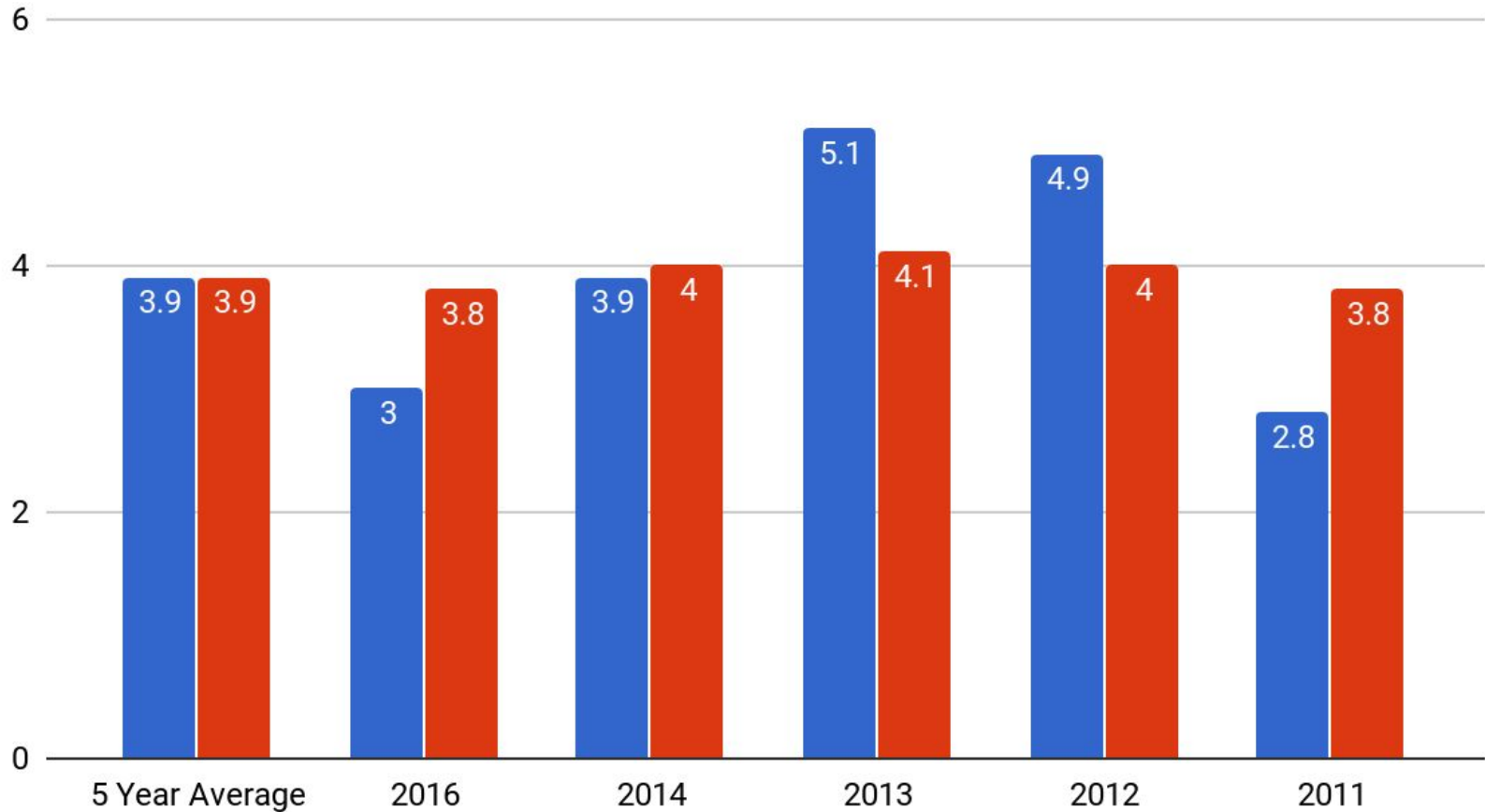
# Average Visitor Age



# Income



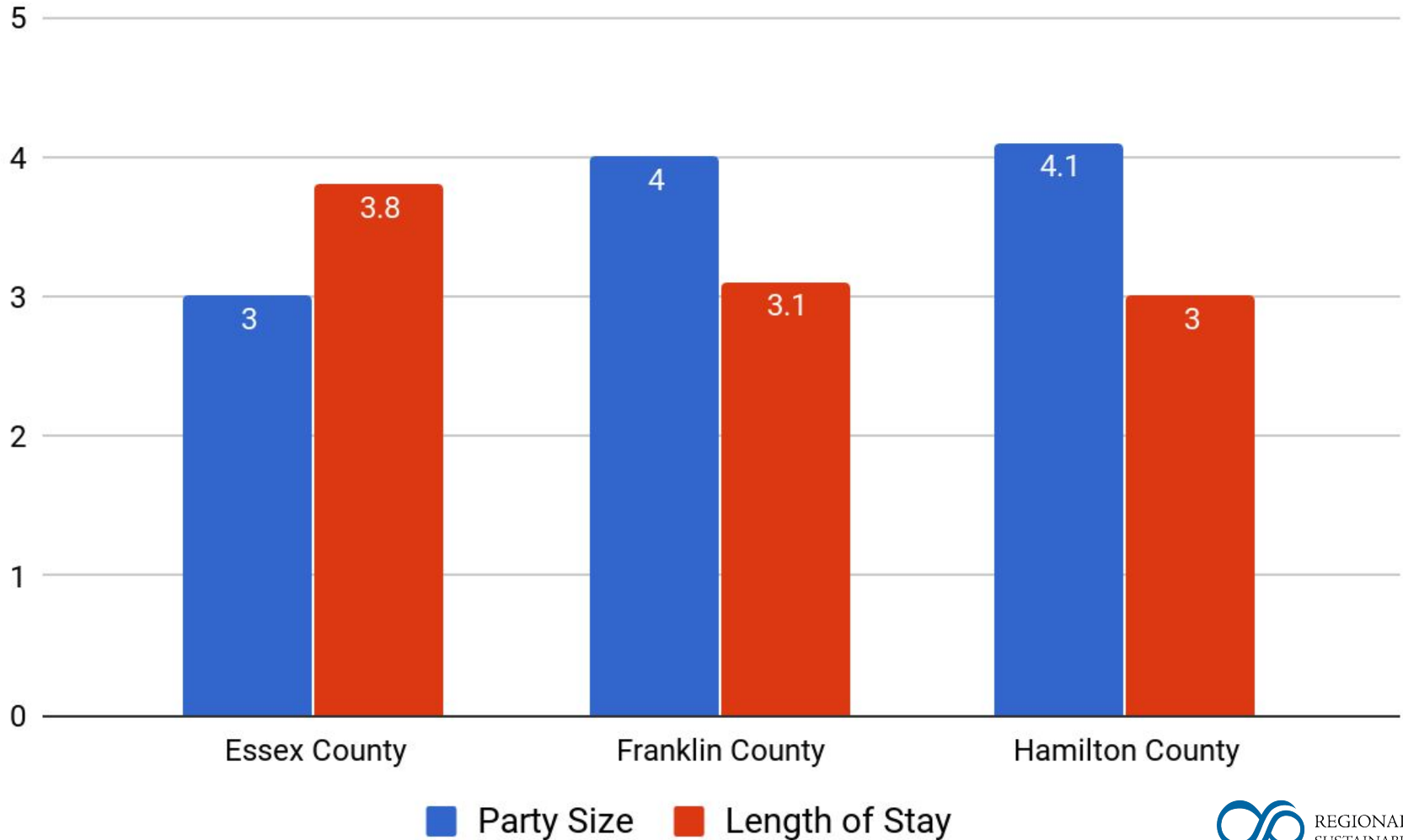
# Essex County Five Year Party Size/Length of Stay\*



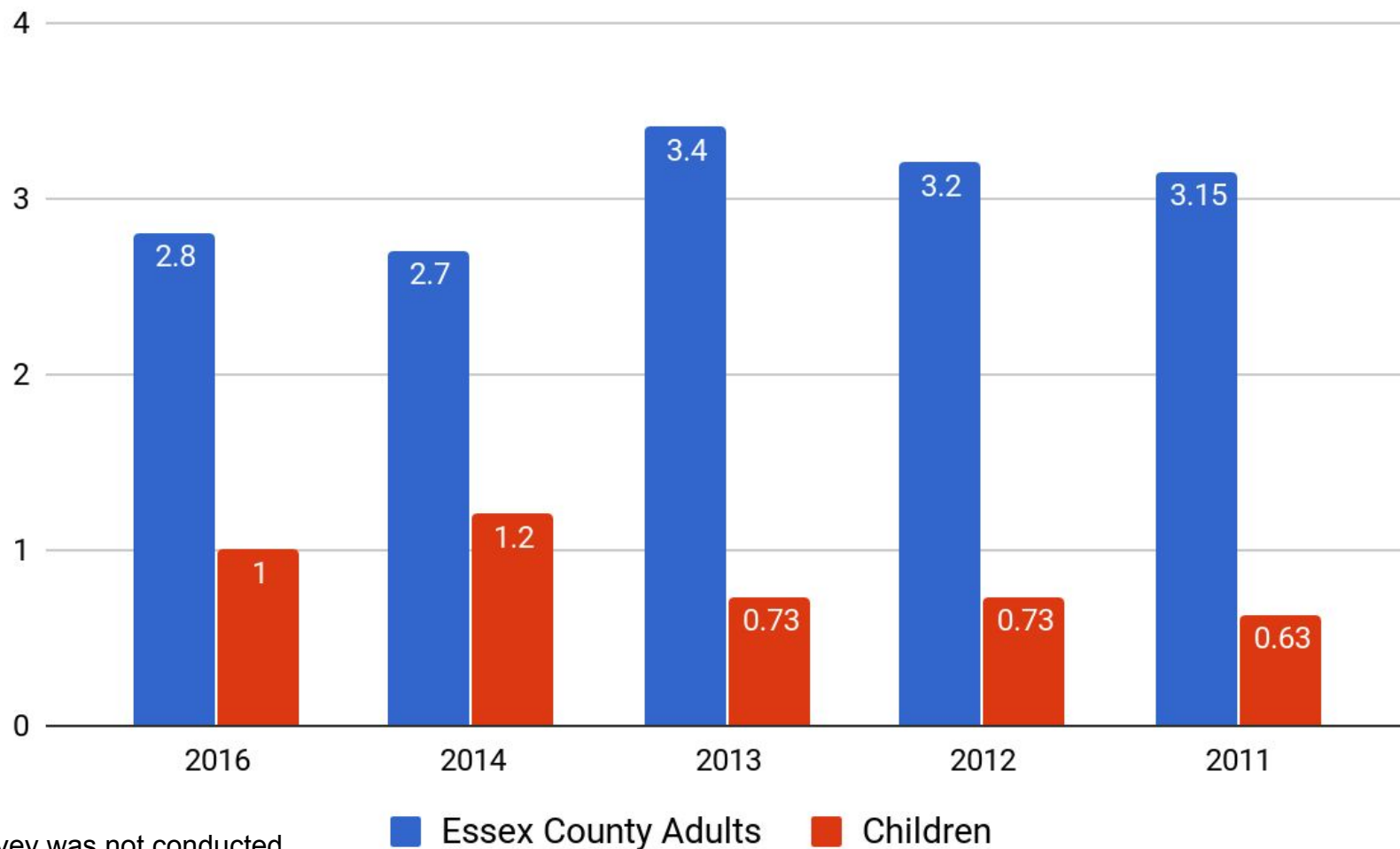
\* 2015 Survey was not conducted

■ Essex County Party Size ■ Length of Stay

# Party Size/Length of Stay



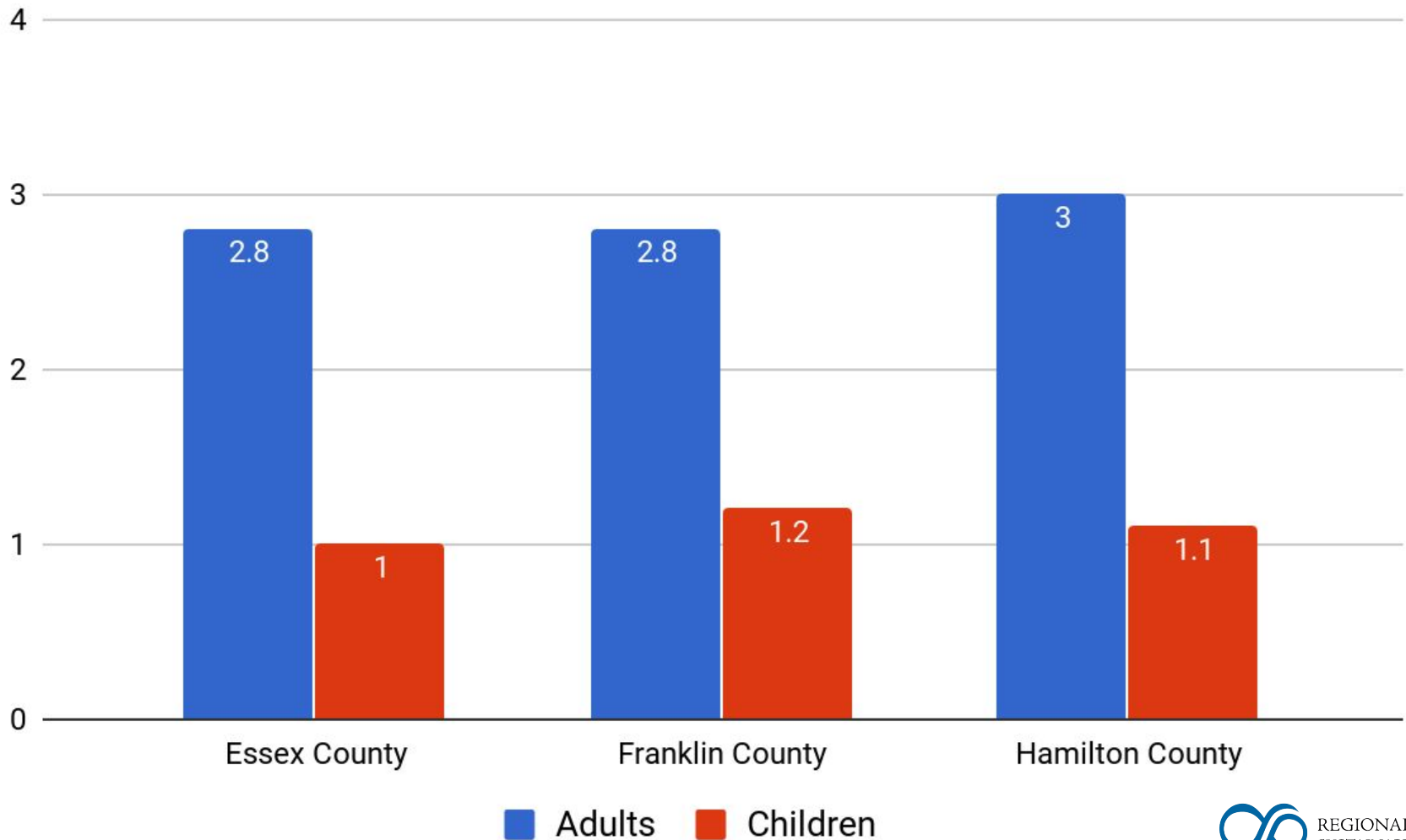
# Visitor Party Composition- Adults & Children Essex County Five Year\*



\* 2015 Survey was not conducted

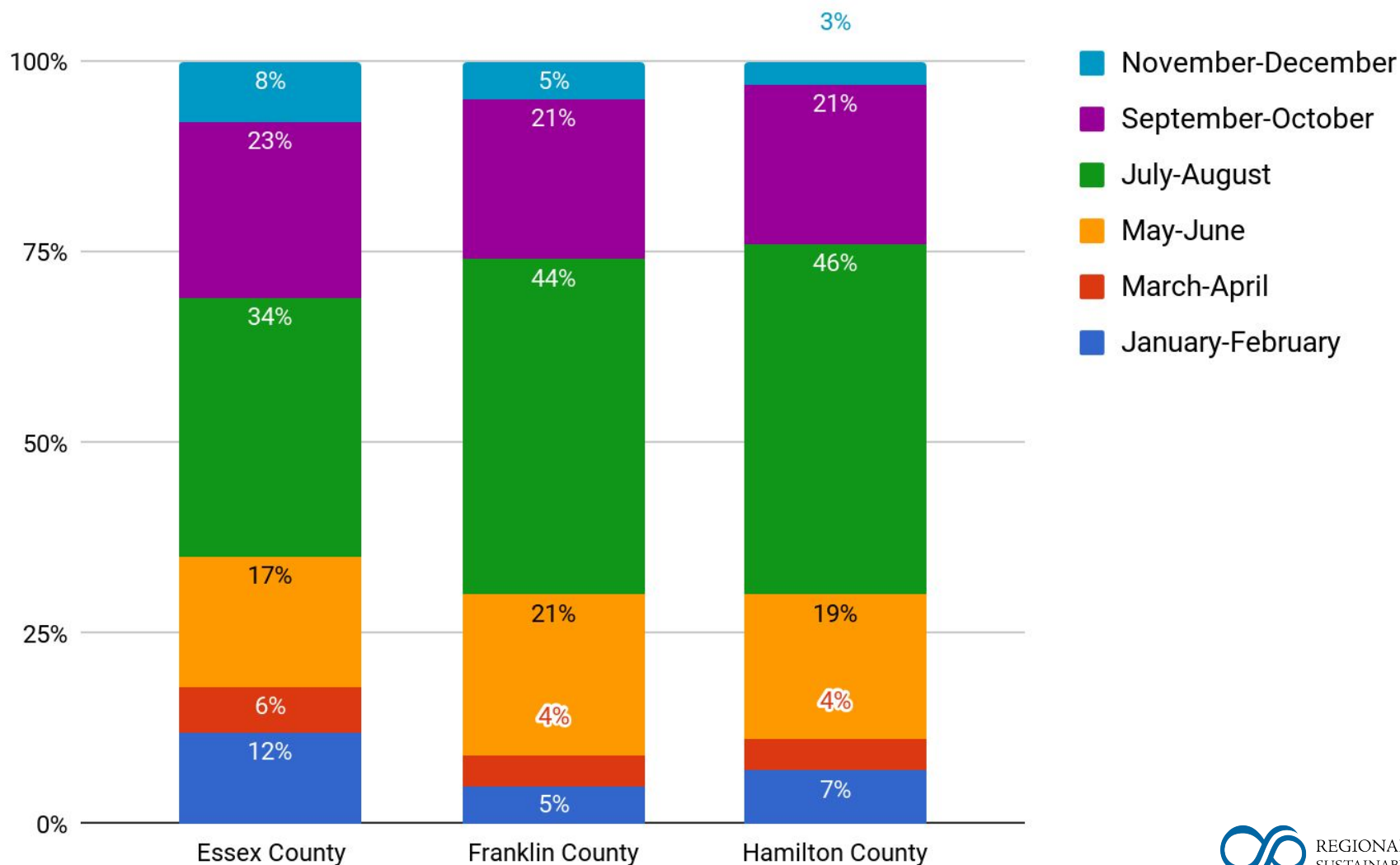
August 2017

# Visitor Party Composition- Adults & Children

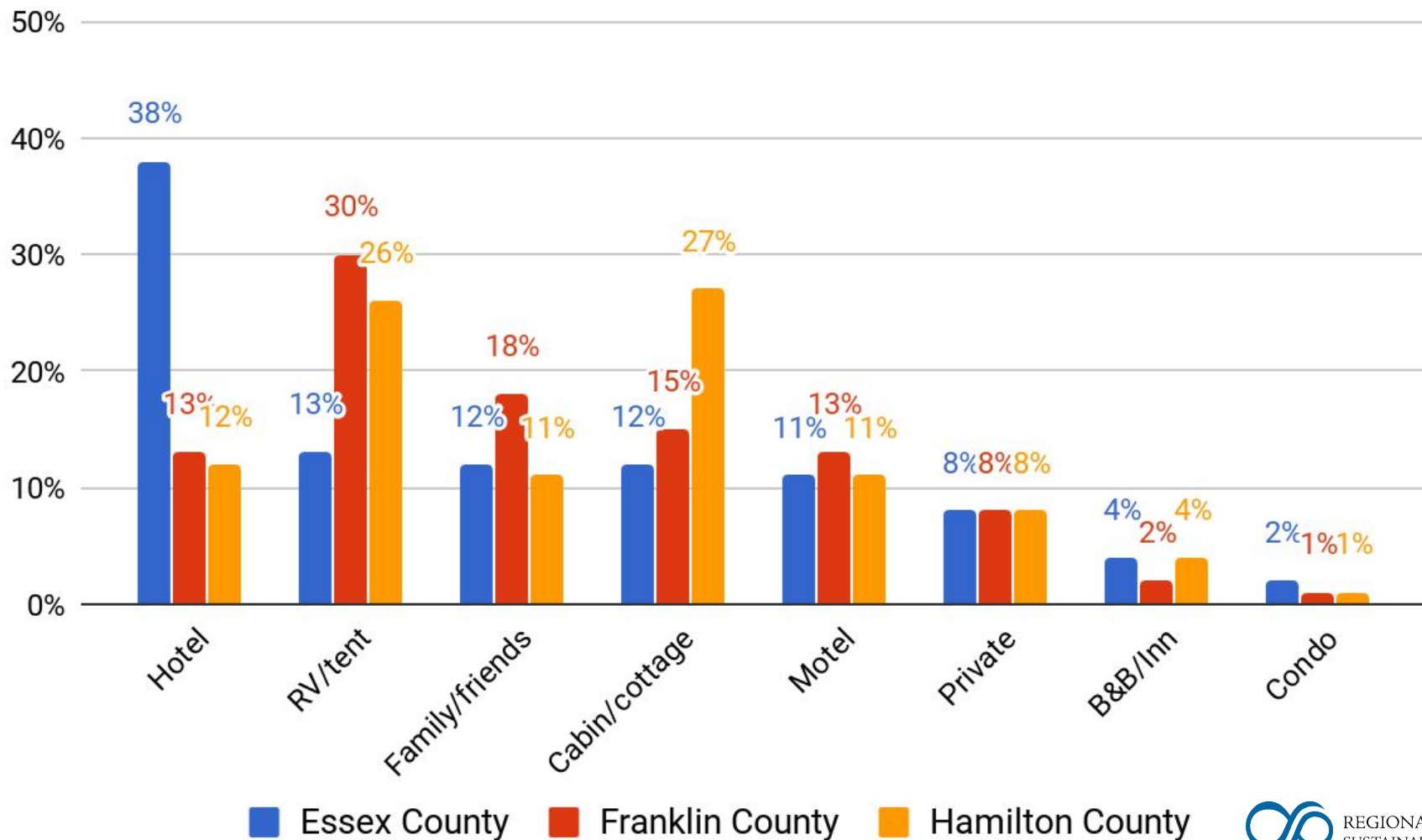




# Time of Year Visited - 2016 Visitors

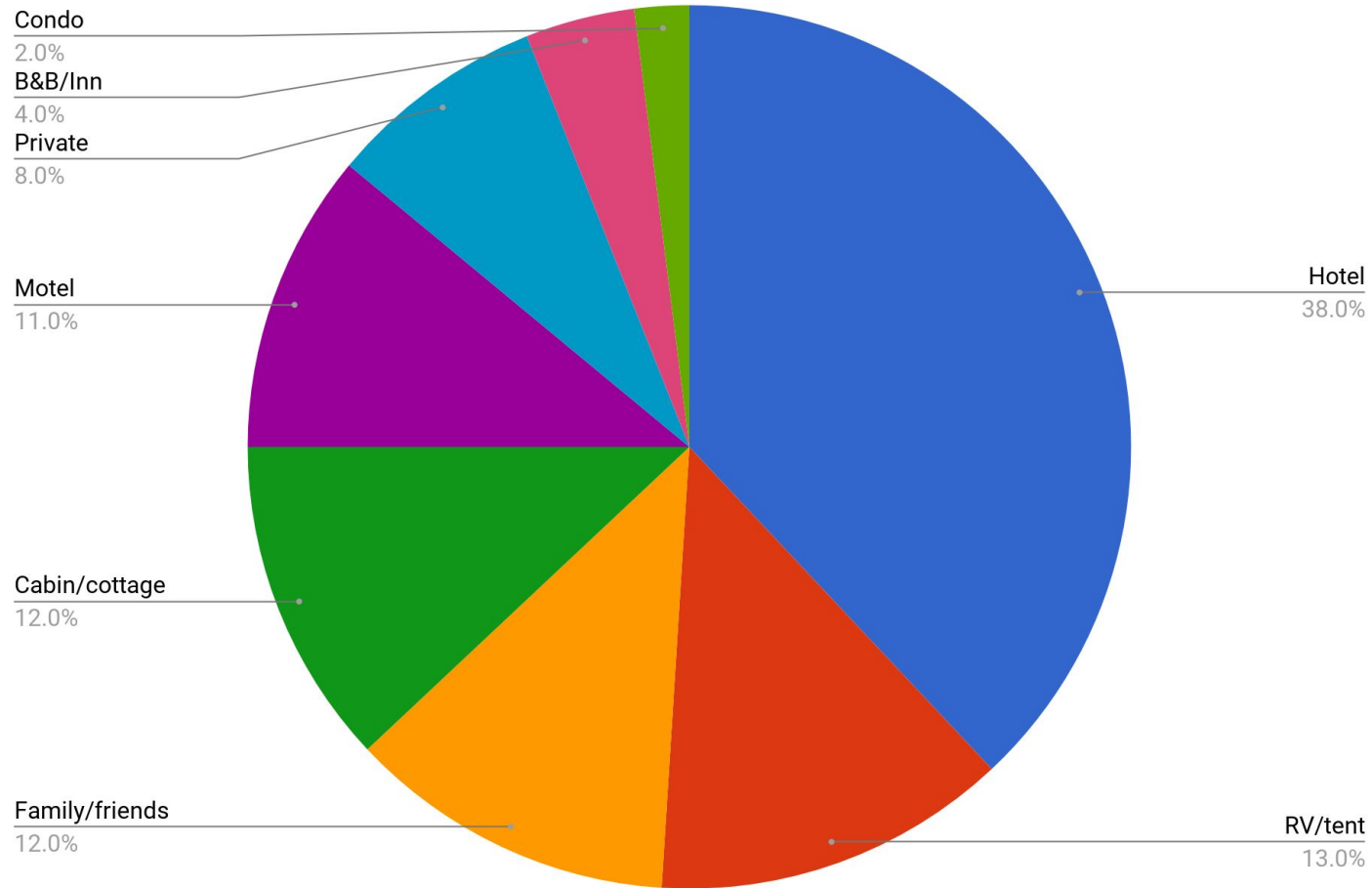


# Accommodations- 2016 Visitors



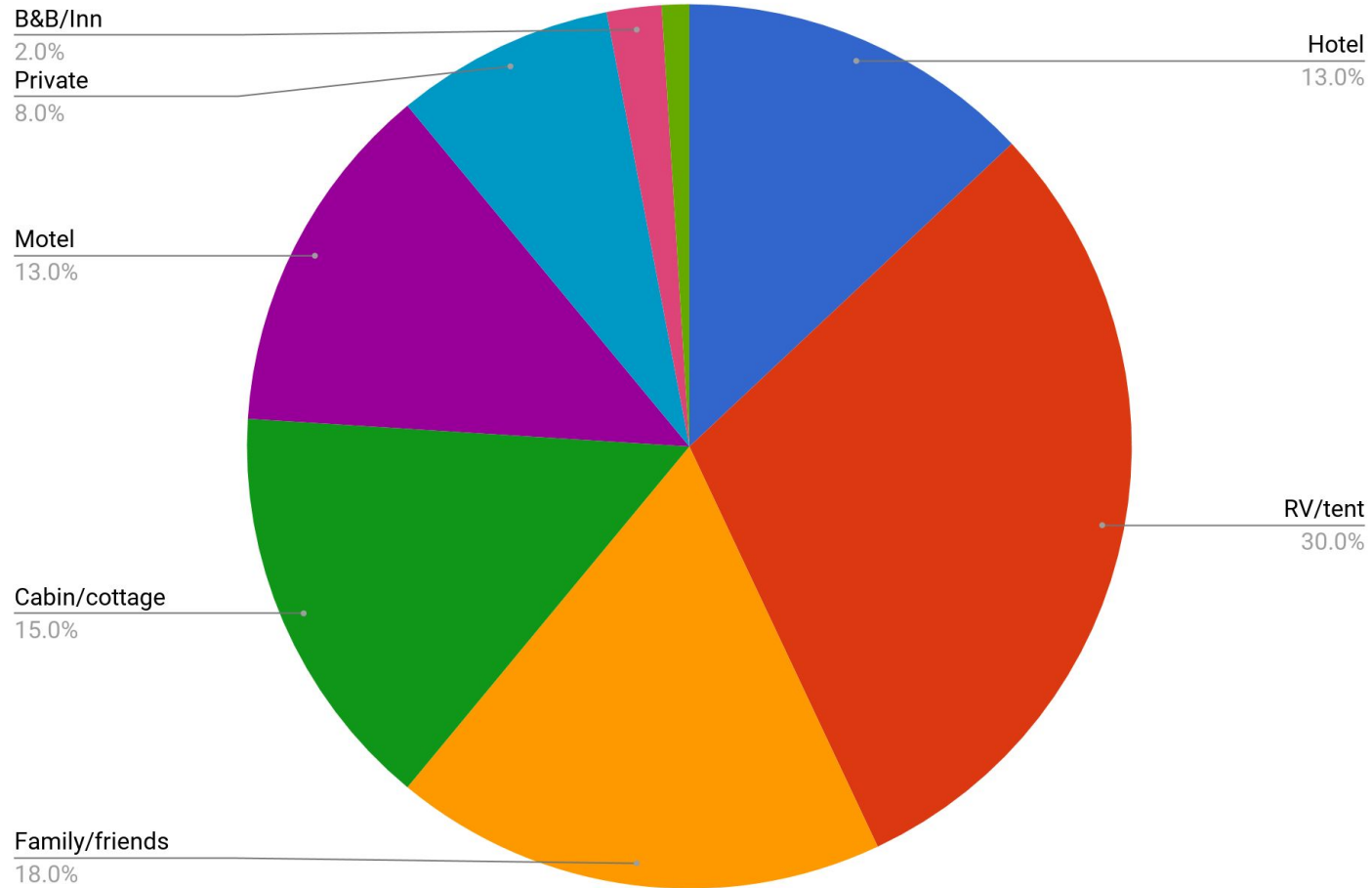
# Accommodations- Essex County 2016

## Visitors

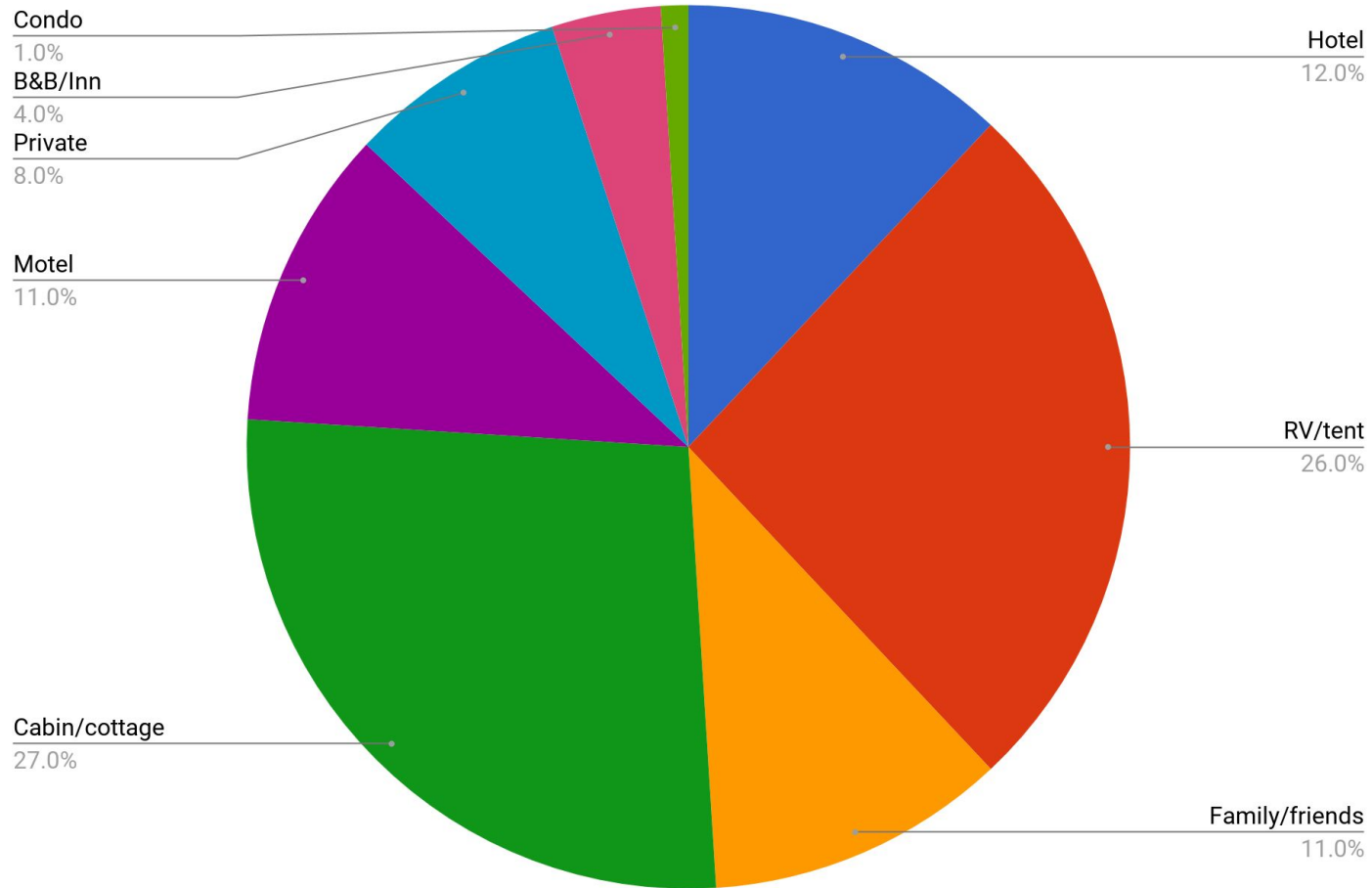


# Accommodations- Franklin County 2016

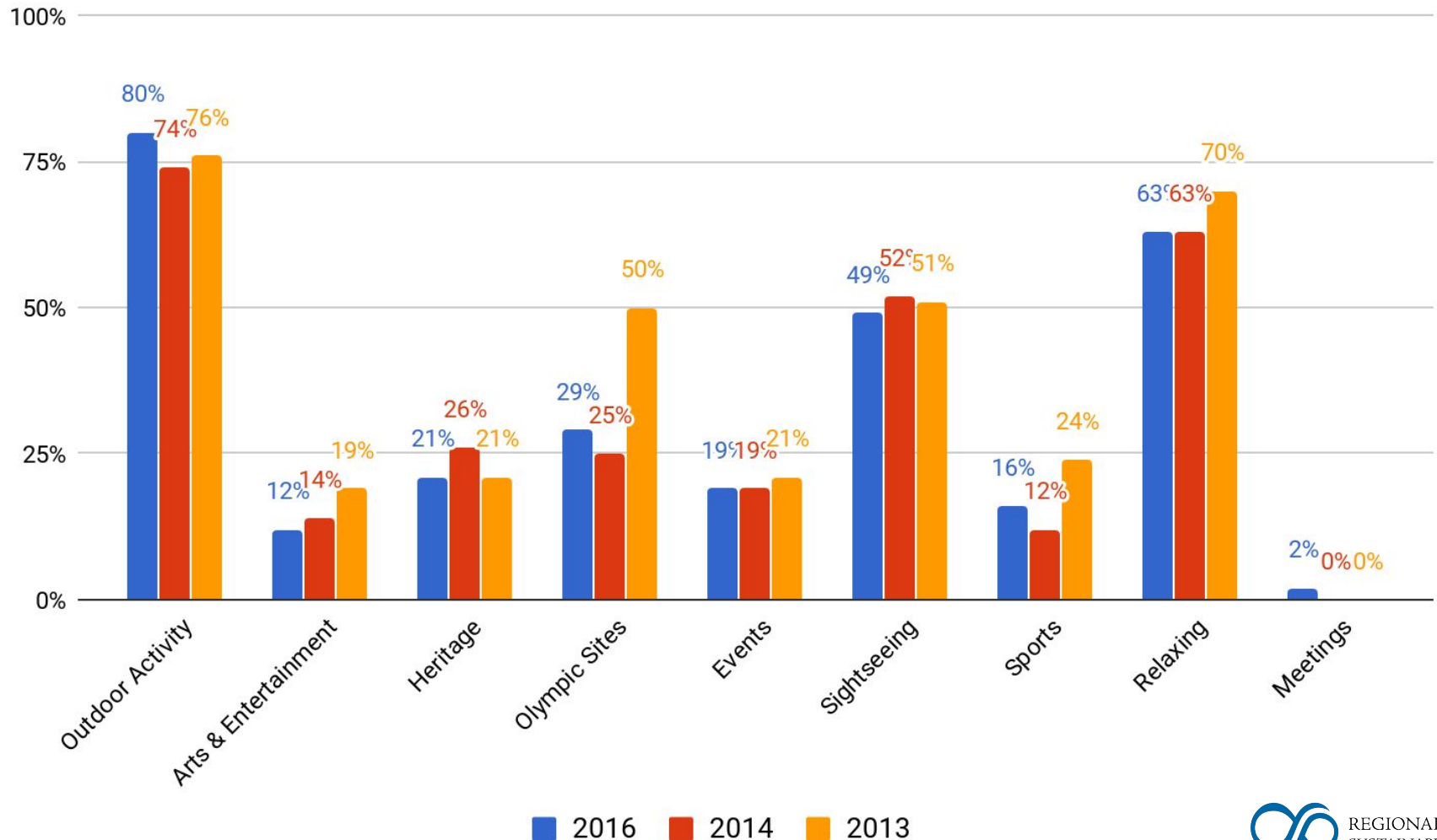
## Visitors



# Accommodations- Hamilton County 2016 Visitors

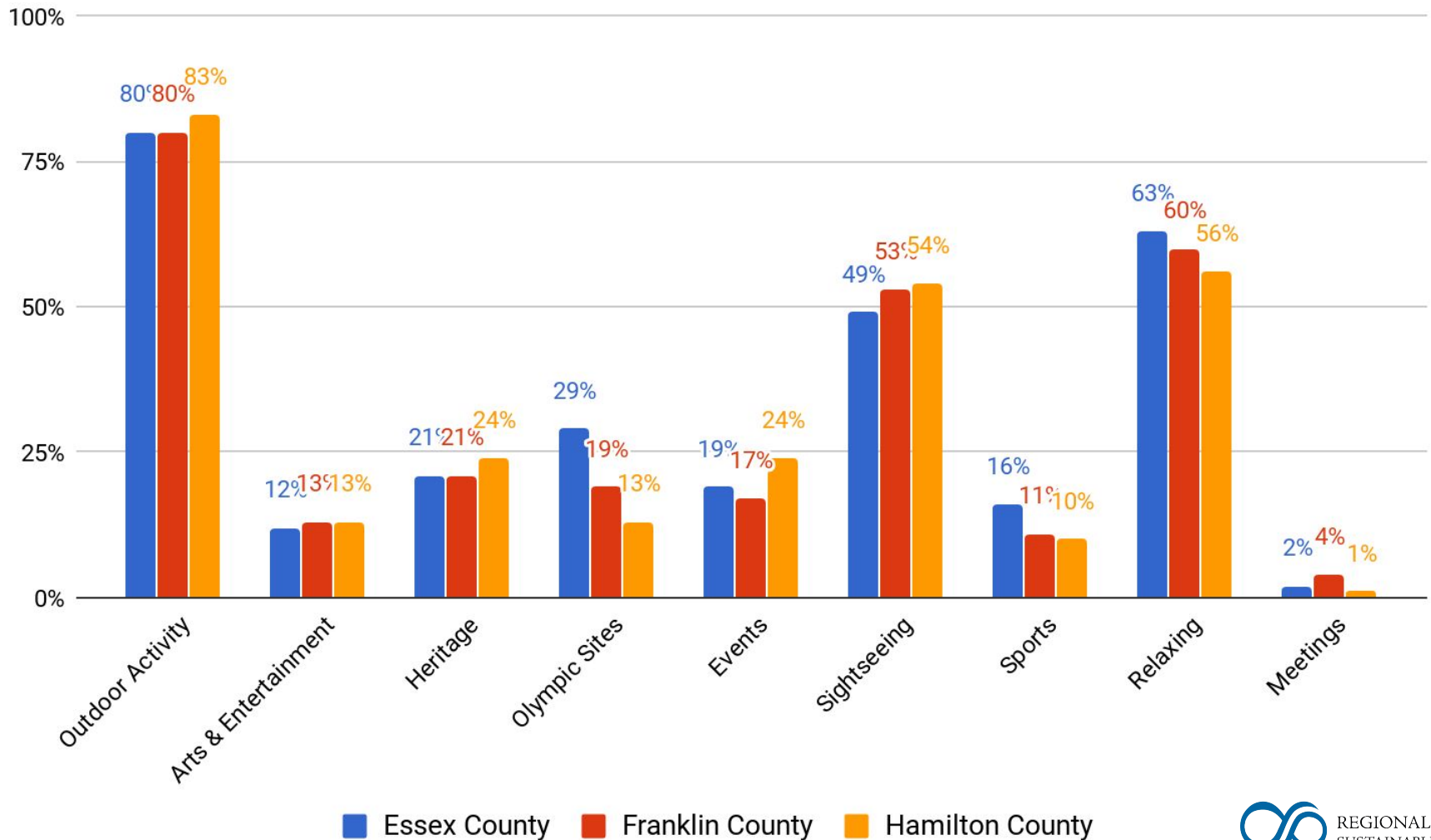


# Key Attractions to Visiting Essex County: 2013, 2014 & 2016\*

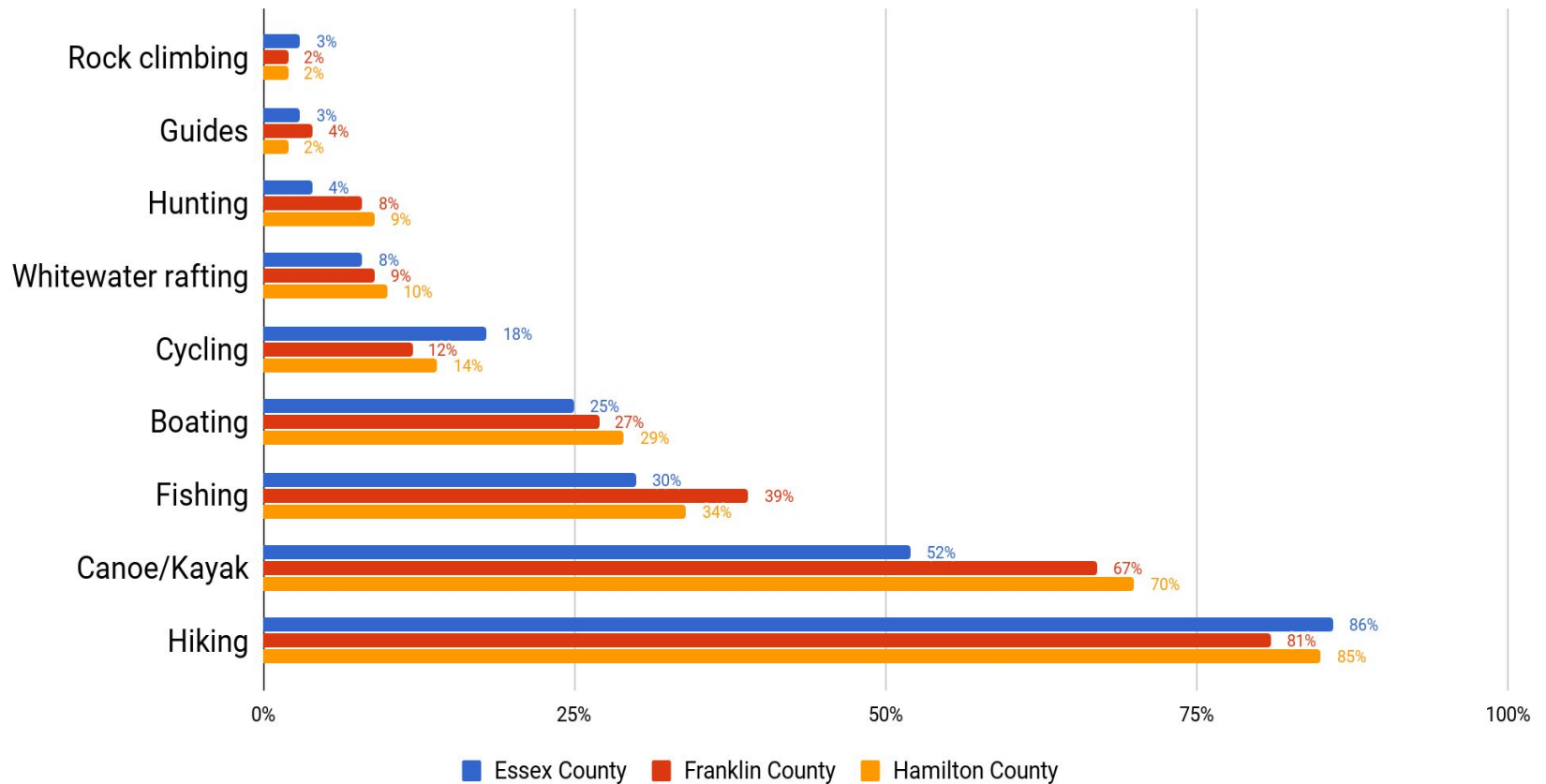




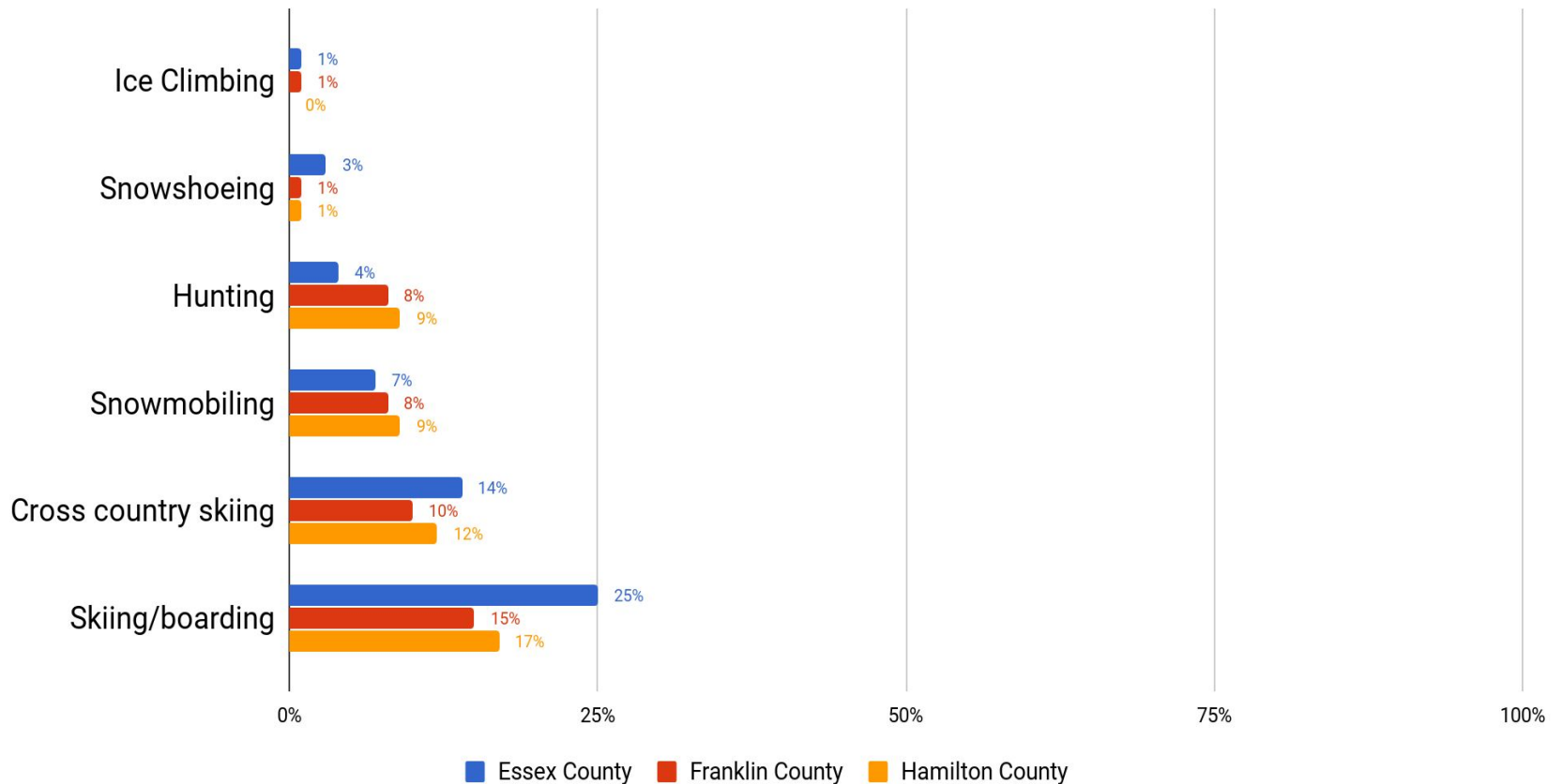
# Key Attractions - 2016



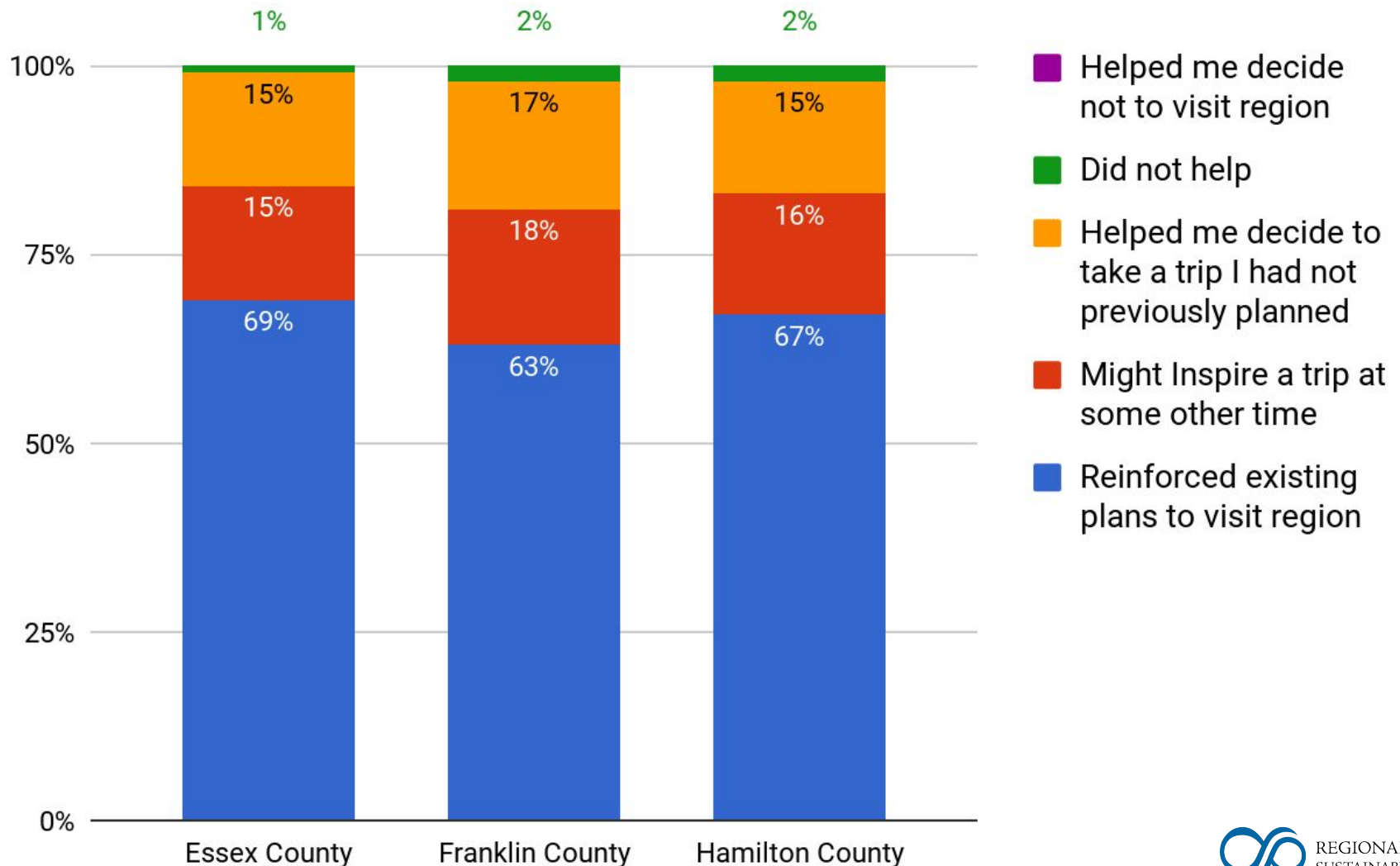
# Outdoor Summer Activities Interests



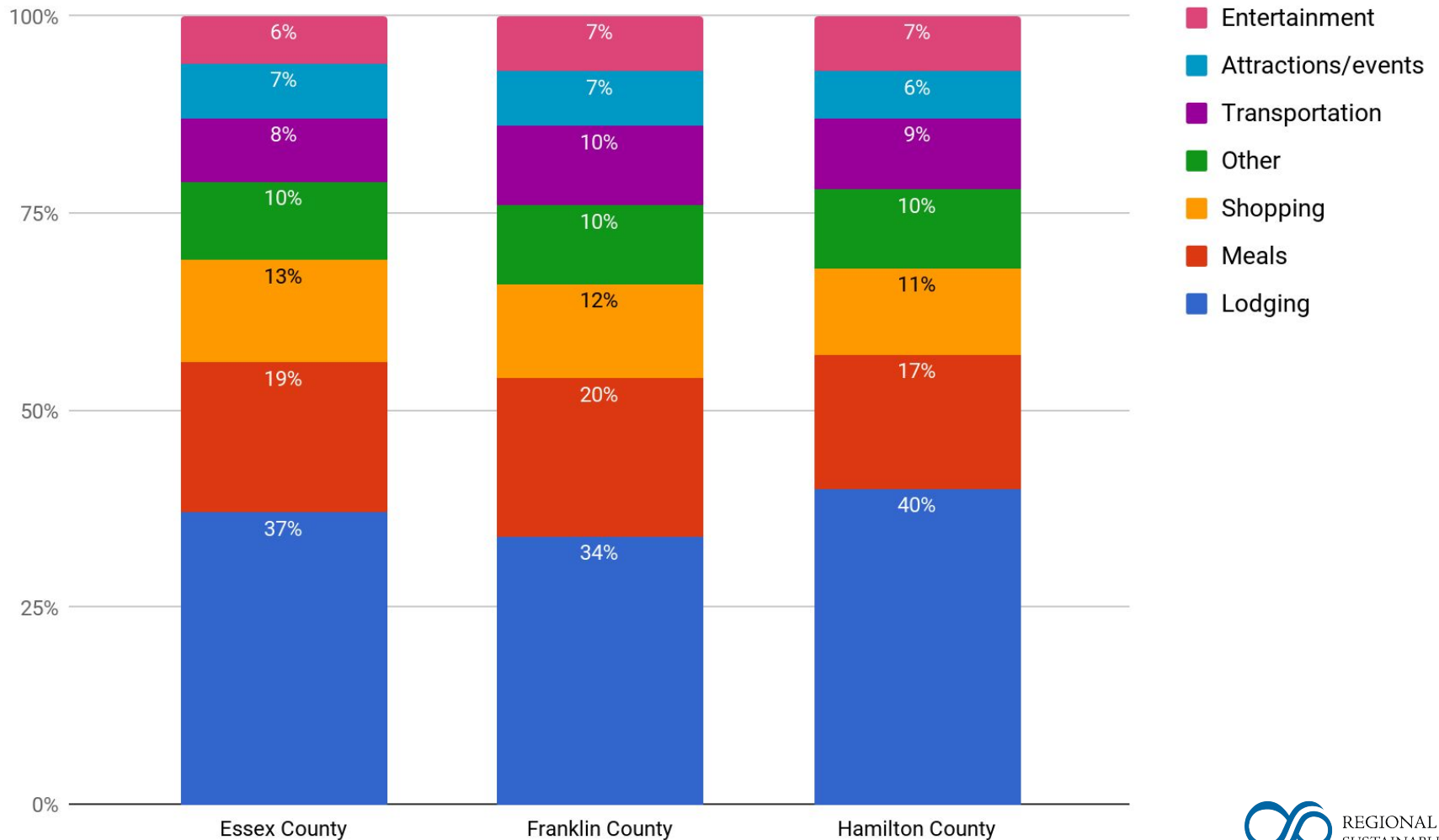
# Outdoor Winter Activities Interests



# Conversion Rate of 2016 Visitors from Viewing ROOST Marketing Materials



# Visitor Total Expenditure Allocation by Category



# 2011-2016 Essex County Mean Expenditures by Visitor Party Per Day\*

CATEGORY	5 Year Average	2016	2014	2013	2012	2011
ATTRACTIONS & EVENTS	\$20	\$26	\$21	\$19	\$15	\$21
ENTERTAINMENT	\$19	\$25	\$22	\$14	\$14	\$21
TRANSPORTATION	\$35	\$31	\$33	\$37	\$37	\$37
LODGING	\$150	\$144	\$129	\$138	\$147	\$191
MEALS	\$75	\$75	\$62	\$69	\$68	\$103
SOUVENIRS/ SHOPPING	\$42	\$49	\$39	\$34	\$34	\$55
ALL OTHER	\$23	\$37	\$32	\$12	\$11	\$25
AVERAGE DAILY EXPENDITURE	\$365	\$387	\$338	\$323	\$326	\$453

\* 2015 Survey was not conducted



# 2016 Mean Reported Expenditures Visitor Party Per Day by County

CATEGORY	Essex	Franklin	Hamilton
ATTRACTIONS & EVENTS	\$26	\$21	\$17
ENTERTAINMENT	\$25	\$21	\$21
TRANSPORTATION	\$31	\$27	\$29
LODGING	\$144	\$97	\$124
MEALS	\$75	\$56	\$53
SOUVENIRS/ SHOPPING	\$49	\$35	\$35
ALL OTHER	\$37	\$27	\$30
AVERAGE DAILY EXPENDITURE	\$387	\$285	\$309
AVERAGE TOTAL EXPENDITURE	\$1,471	\$884	\$927



# ESSEX COUNTY VISITOR PROFILE

# ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

***adirondacks, usa***

# Essex County Visitor Profile

- Mean length of stay reported is 3.8 nights
- Average visitor party size largely consistent but growth of children in visitor parties; family travel increasing
- 57% of visitors report travel during peak summer and fall season (July-October) (74% report travel from May-October)

# Essex County Visitor Profile

- Outdoor activities, relaxing/dining/shopping, and sightseeing remain the predominate draws to area
- Hotels continued to be the strongest lodging choice by far
- Camping and cabin rentals remained more commonly selected choice than in years past, showing growth for the second year

# Essex County Visitor Profile

- Visitors who selected outdoor activities as a key draw for their visit were queried as to which types of outdoor activities were of interest: Hiking again received record-setting levels of interest
- Skiing/Boarding/XC Skiing showed stronger interest than in prior year



An aerial photograph of a large body of water, likely a lake, with numerous small, green, forested islands and peninsulas. A road is visible in the bottom left corner. The sky is blue with white clouds. A red rectangular block is on the left side of the header, and a teal rectangular block is on the right side of the header.

# FRANKLIN COUNTY VISITOR PROFILE

# ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

***adirondacks, usa***



# Franklin County Visitor Profile

- Nearly  $\frac{3}{4}$  of visitors from NYS
- Mean total party size = 4.0
- Includes 2.8 adults and 1.2 children
- Mean length of stay in Franklin County = 3.1 nights
- Cottages and cabins and camping in RV/tents are the primary lodging choice reported by nearly half of respondents (45%)

# Franklin County Visitor Profile

- The majority of visitors who selected that outdoor activities were a key draw for their visit were queried as to which types of outdoor activities were of interest: Hiking and canoeing/kayaking led the list of outdoor activities



# HAMILTON COUNTY VISITOR PROFILE

ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

*adirondacks, usa*

# Hamilton County Visitor Profile

- ❑ Western NYS visitors are predominate visitor group
- ❑ Mean total party size is 4.1 and includes 3 adults and 1.1 children
- ❑ Mean length of stay reported is 3 nights

# Hamilton County Visitor Profile

- Cottages and cabins and camping in RV/tents are the primary lodging choice reported by more than half of respondents (53%)
- Just over 2/3 of visitors to Hamilton County reported visits during peak summer and fall months

# Hamilton County Visitor Profile

- The majority of visitors who selected that outdoor activities were a key draw for their visit were queried as to which types of outdoor activities were of interest: Hiking and canoeing/kayaking, by far, led the list followed by boating and fishing

# Regional ROI Study

Return on Marketing Investment  
Analysis for Essex, Franklin and  
Hamilton County Region

ROOST

# Regional Visitor Impacts

- 162,466 direct, traceable leads in 2016
- 83% gross conversion factor
- 3.89 average party size (2.85 adults, 1.04 kids)
- 3.93 average length of overnight stays



# Regional Visitor Impacts

- ***Results in approximately 525,000 estimated visitors in 2016 who were impacted by ROOST marketing in visiting the region***
- ***These visitors generated an estimated nearly \$146.4 million in leisure visitor revenue in 2016***

# Return on Investment (ROI)

For every dollar spent by ROOST in marketing the region- it is estimated that \$63 in visitor revenue was generated in 2016

- \$144,443,603 estimated leisure visitor revenue from 2016
- \$2,339,890 in marketing expenditures through ROOST dedicated marketing budget spent in 2016

**Total Return on Investment (ROI)= 63:1**  
**(\$144,443,603/\$2,339,890)**

# *LEISURE TRAVEL STUDY- ESSEX, FRANKLIN & HAMILTON COUNTY REGION*

2016 COUNTY VISITOR  
PROFILES & REGIONAL  
RETURN ON MARKETING  
INVESTMENT ANALYSIS

August 2017