



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

## 2017 COUNTY VISITOR PROFILES & REGIONAL RETURN ON MARKETING INVESTMENT ANALYSIS

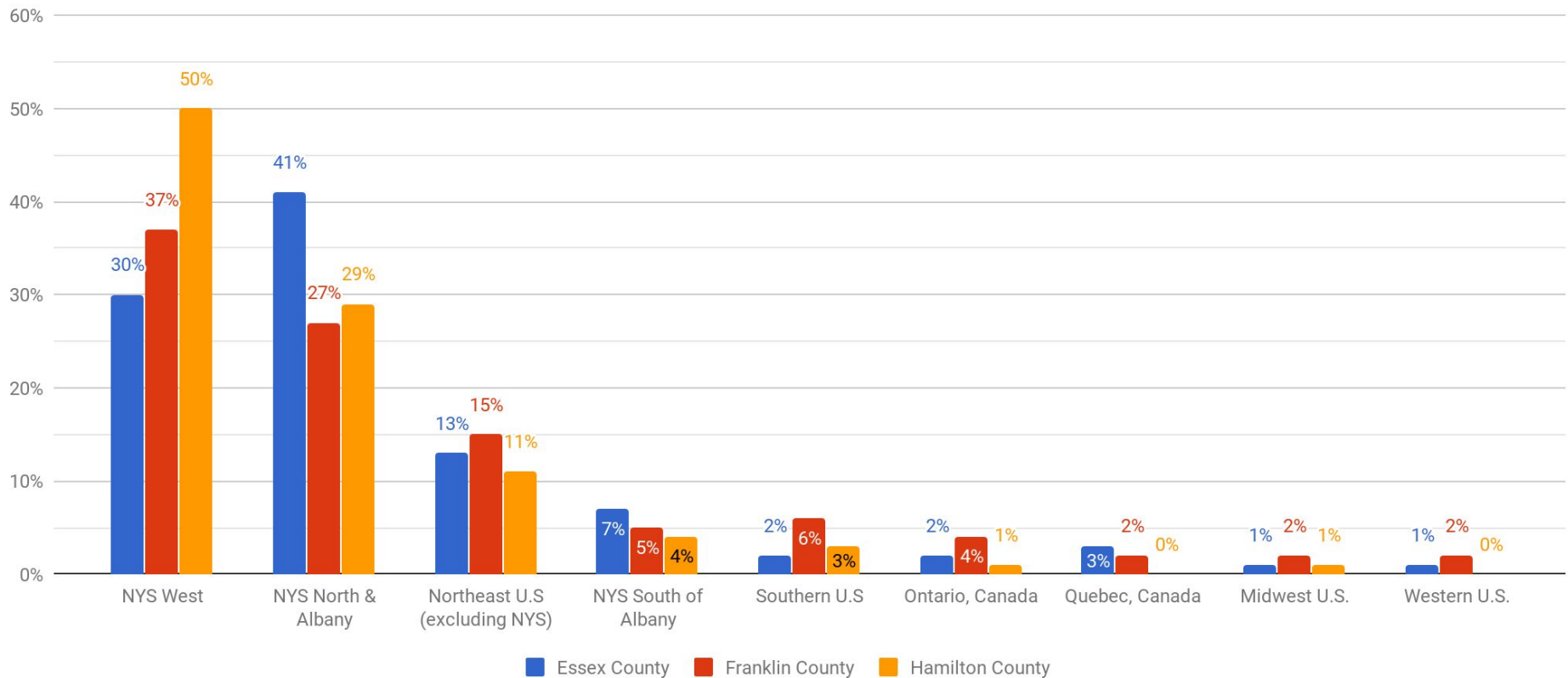
July 2018

# Project Background & Methodology

- ❑ A survey of 2017 visitors to the region was designed jointly by ROOST and PlaceMaking consultants and sent electronically to measure detailed visitor information and estimated expenditures
- ❑ Survey and analysis is consistent with methodology used to study Essex County visitors for past 13 years
- ❑ 5,345 completed surveys were received (a 4.5% response, however comparison with other years indicates validity of data collected)
- ❑ 311,171 potential visitors were captured by ROOST as direct, traceable leads in 2017

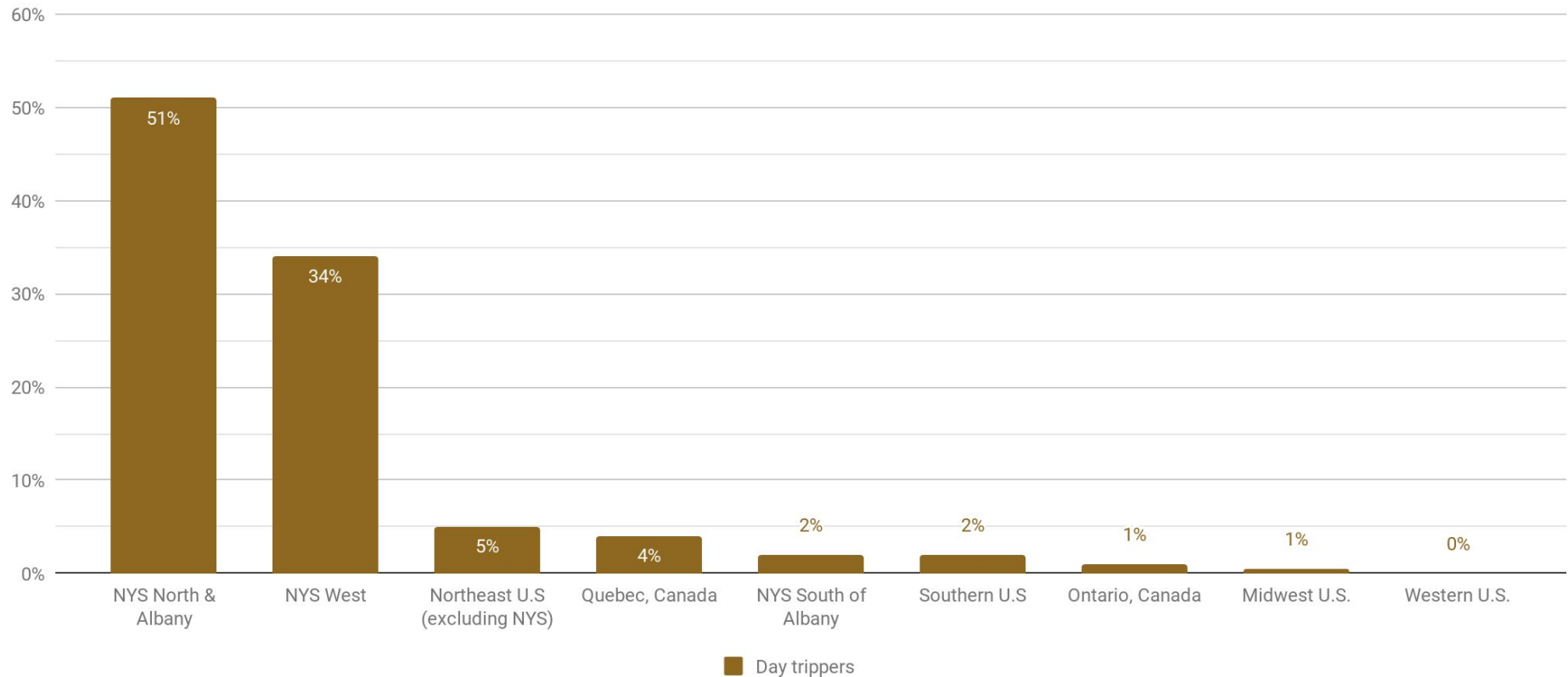
# Area of residence

## All travelers



# Area of residence

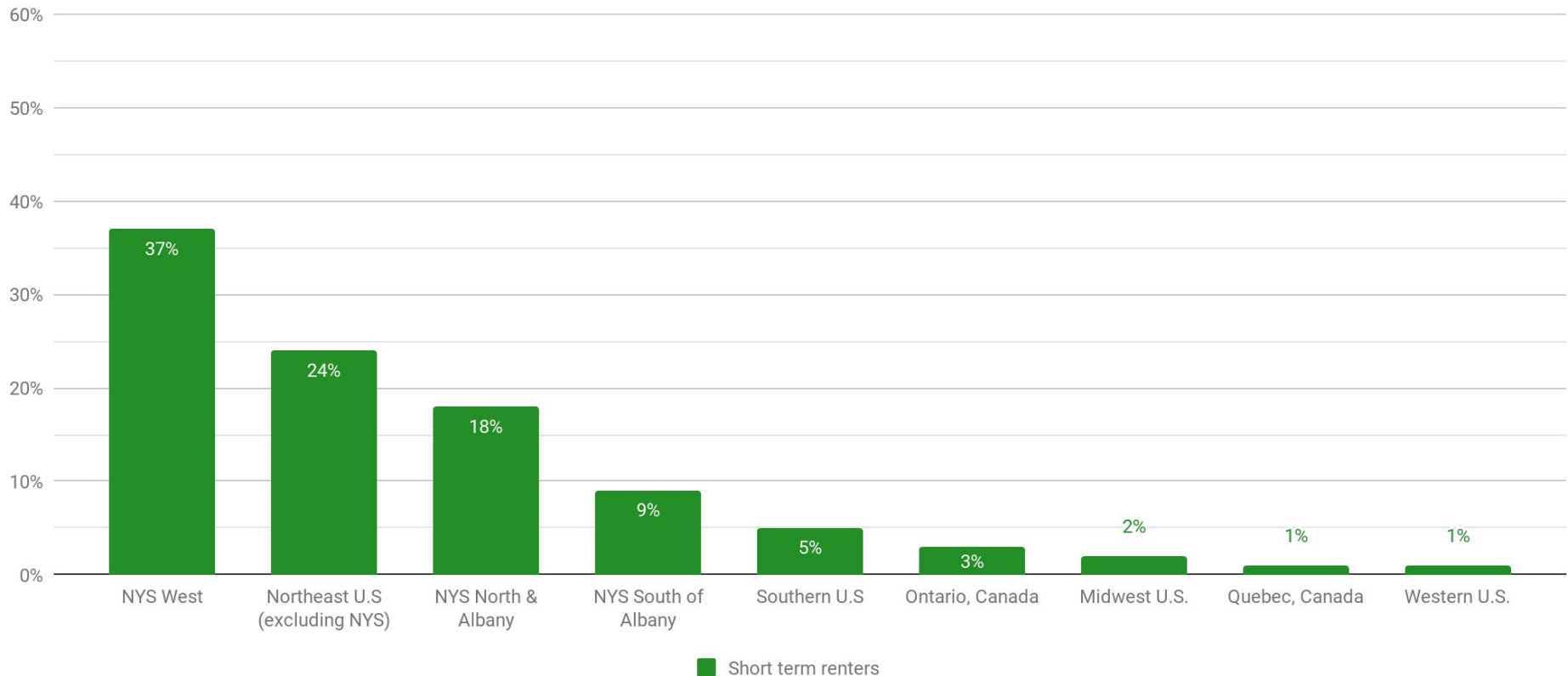
## Day trippers





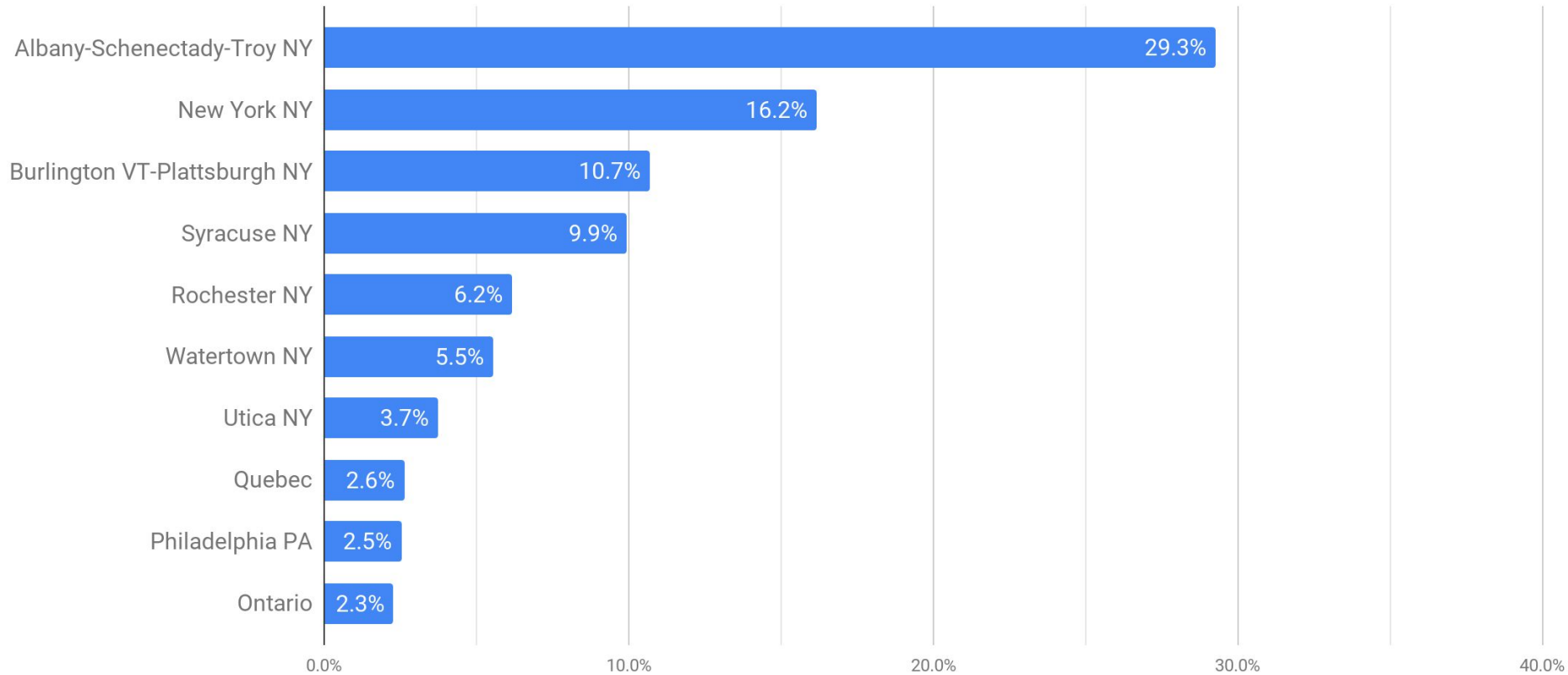
# Area of residence

## Short term renters



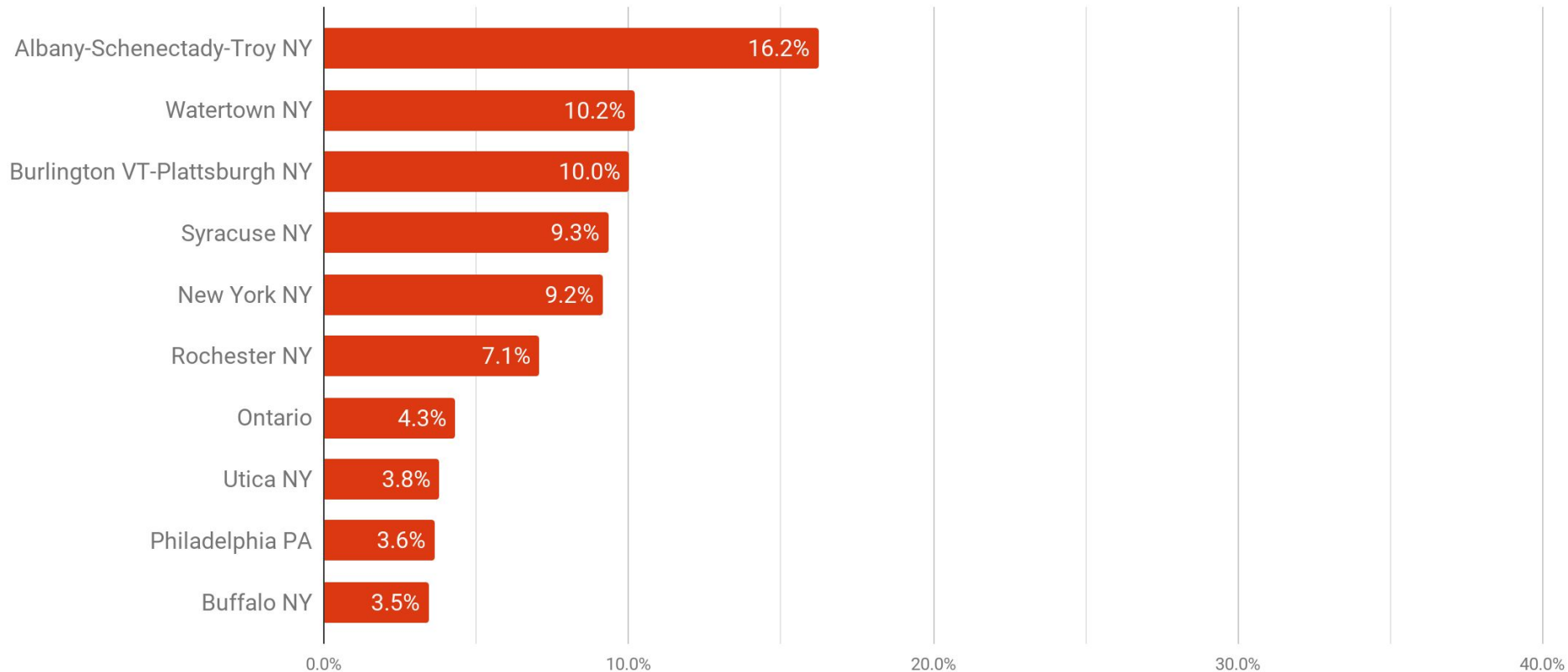
# Area of residence by DMA

## All Essex County travelers



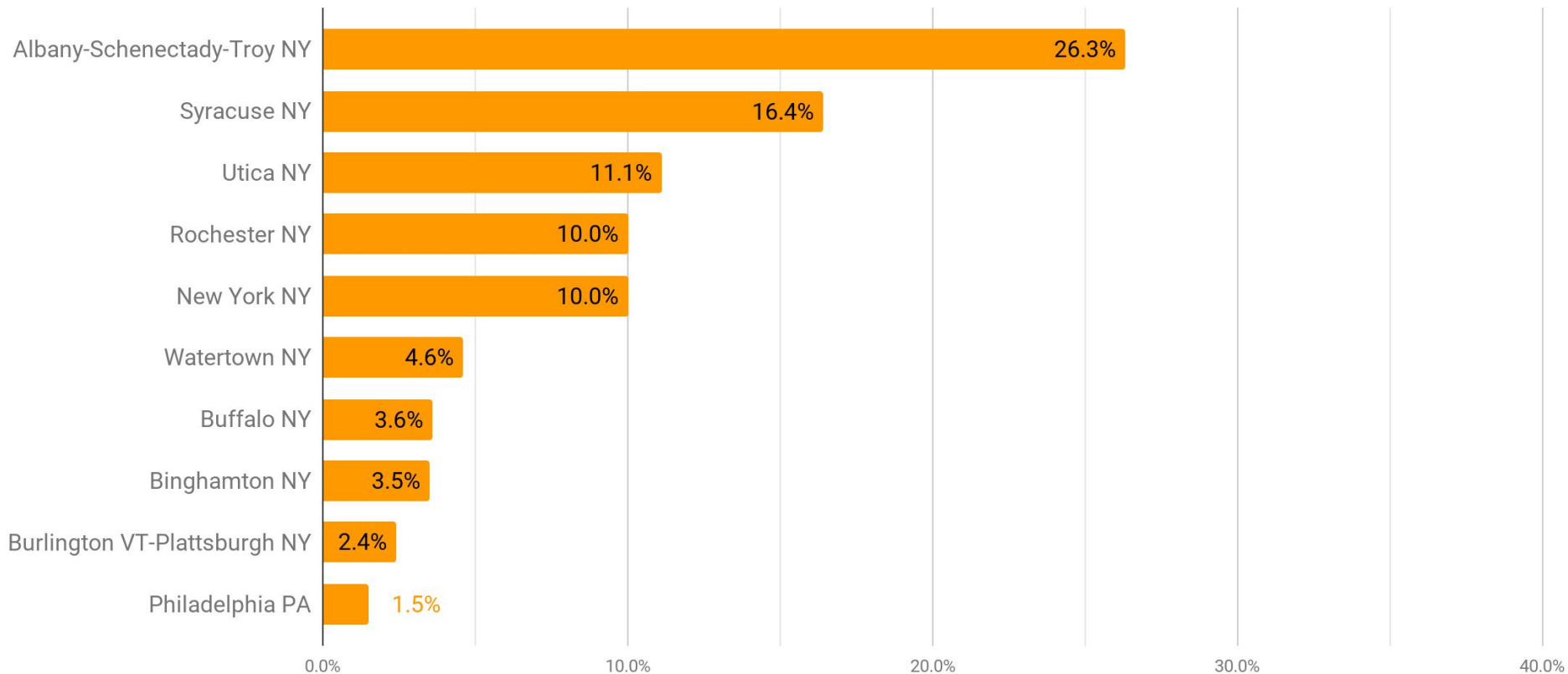
# Area of residence by DMA

## All Franklin County travelers



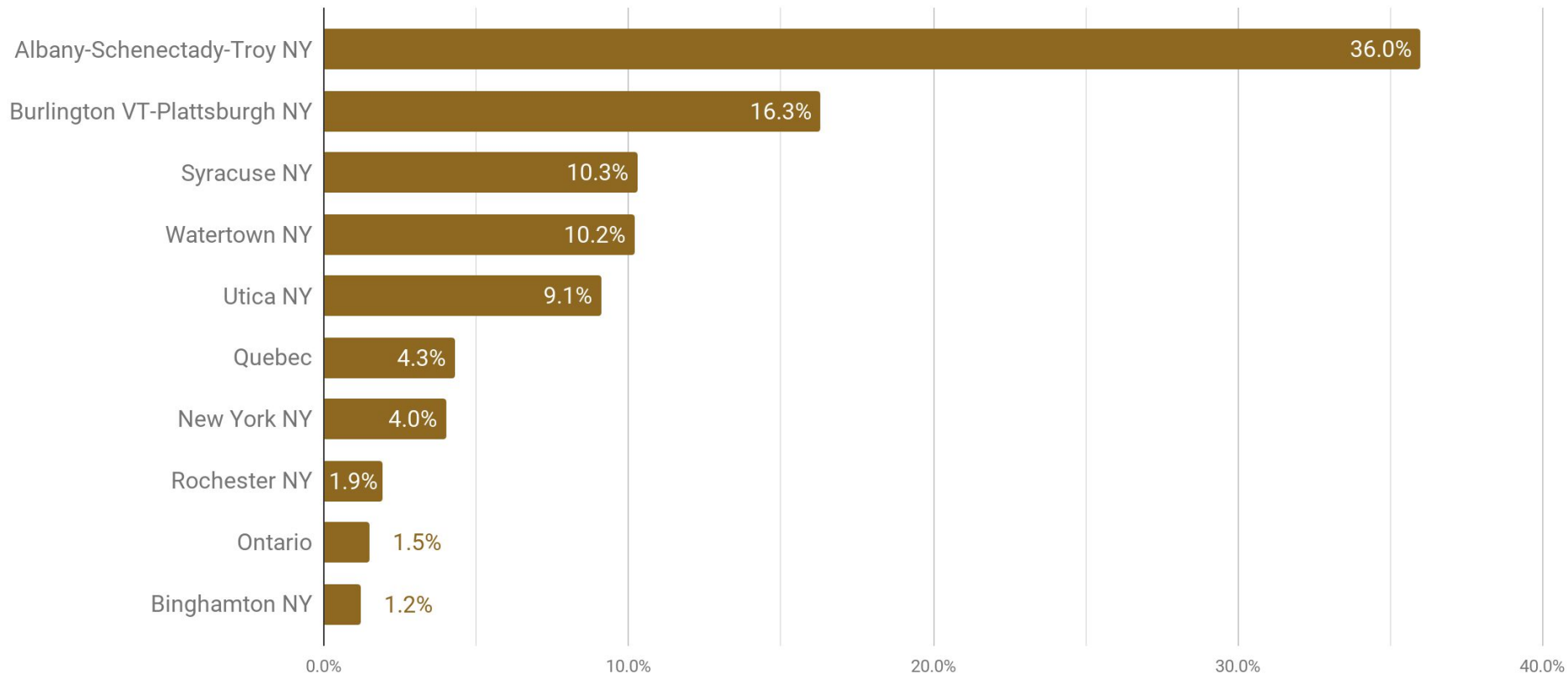
# Area of residence by DMA

## All Hamilton County travelers



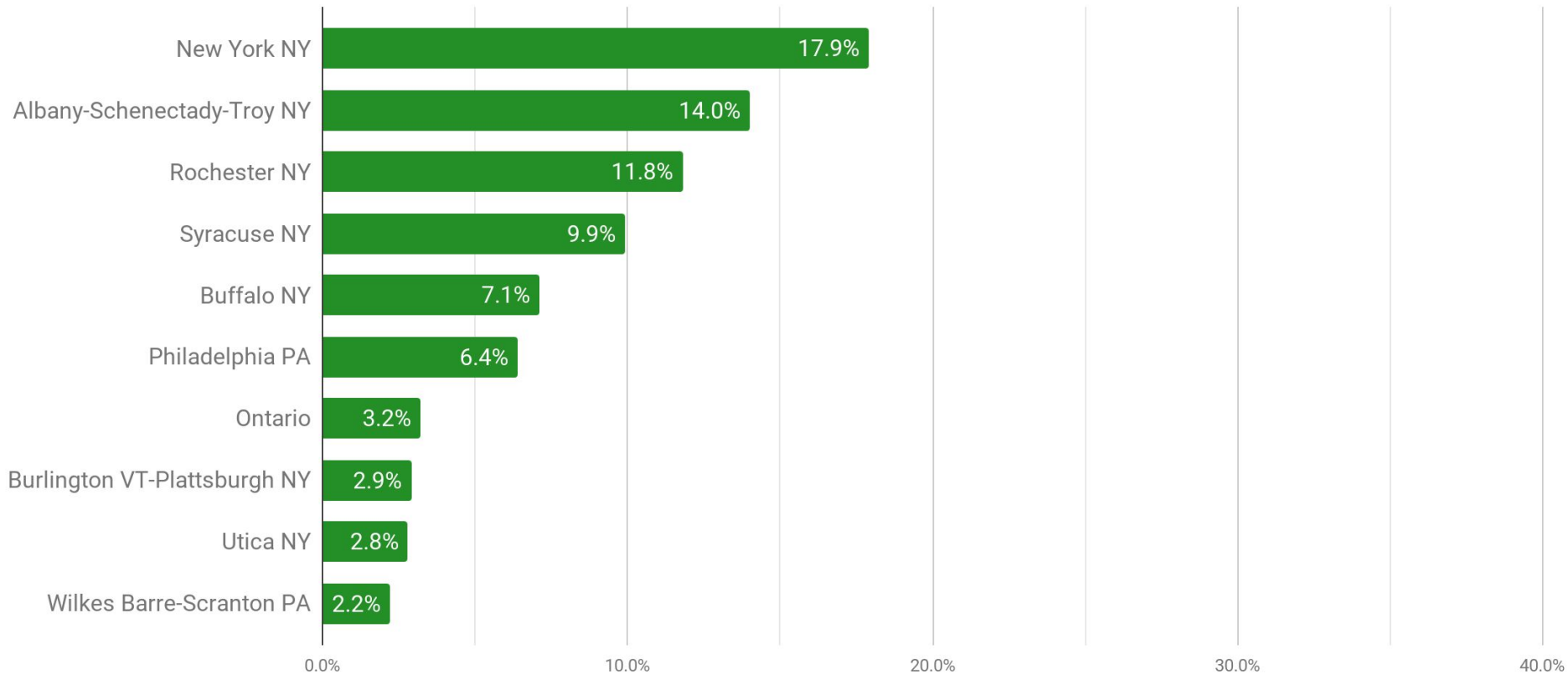
# Area of residence by DMA

## Day trippers



# Area of residence by DMA

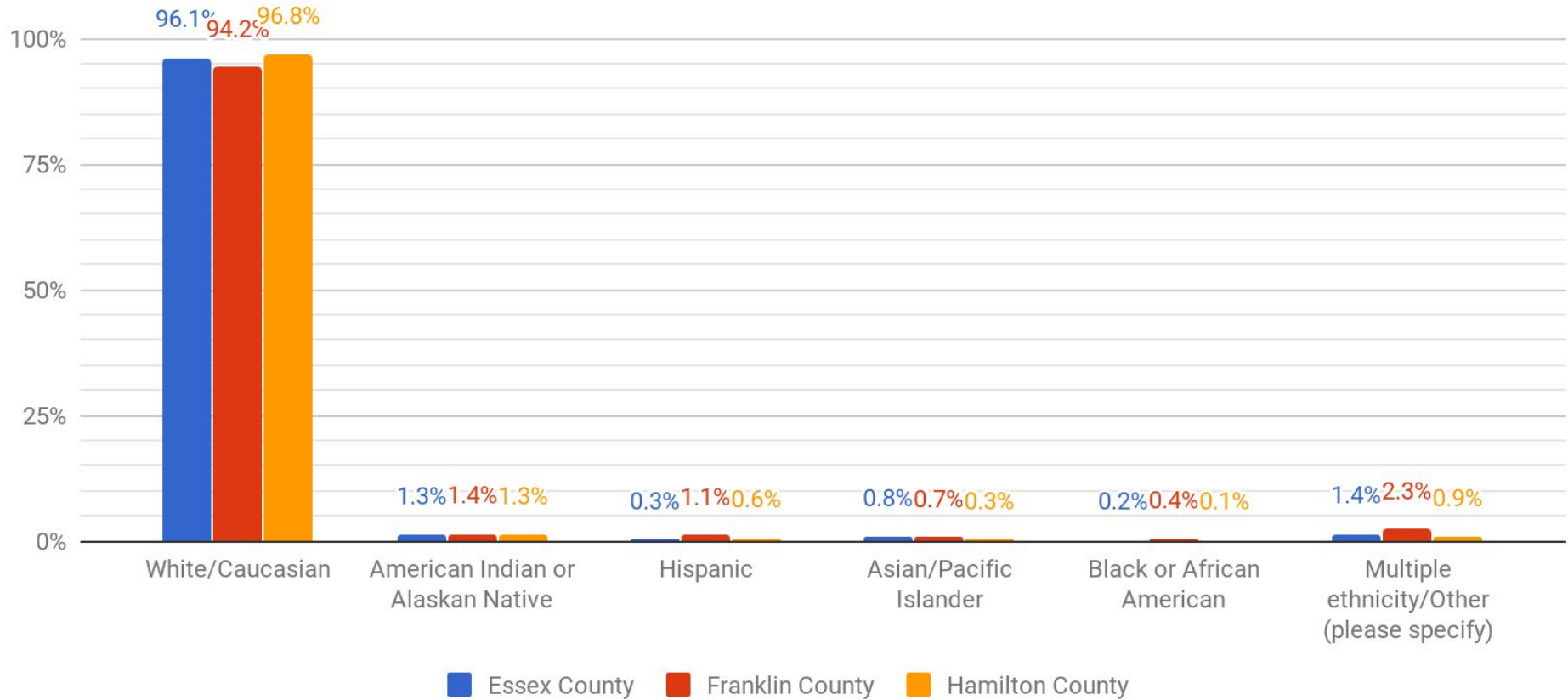
## Short term renters





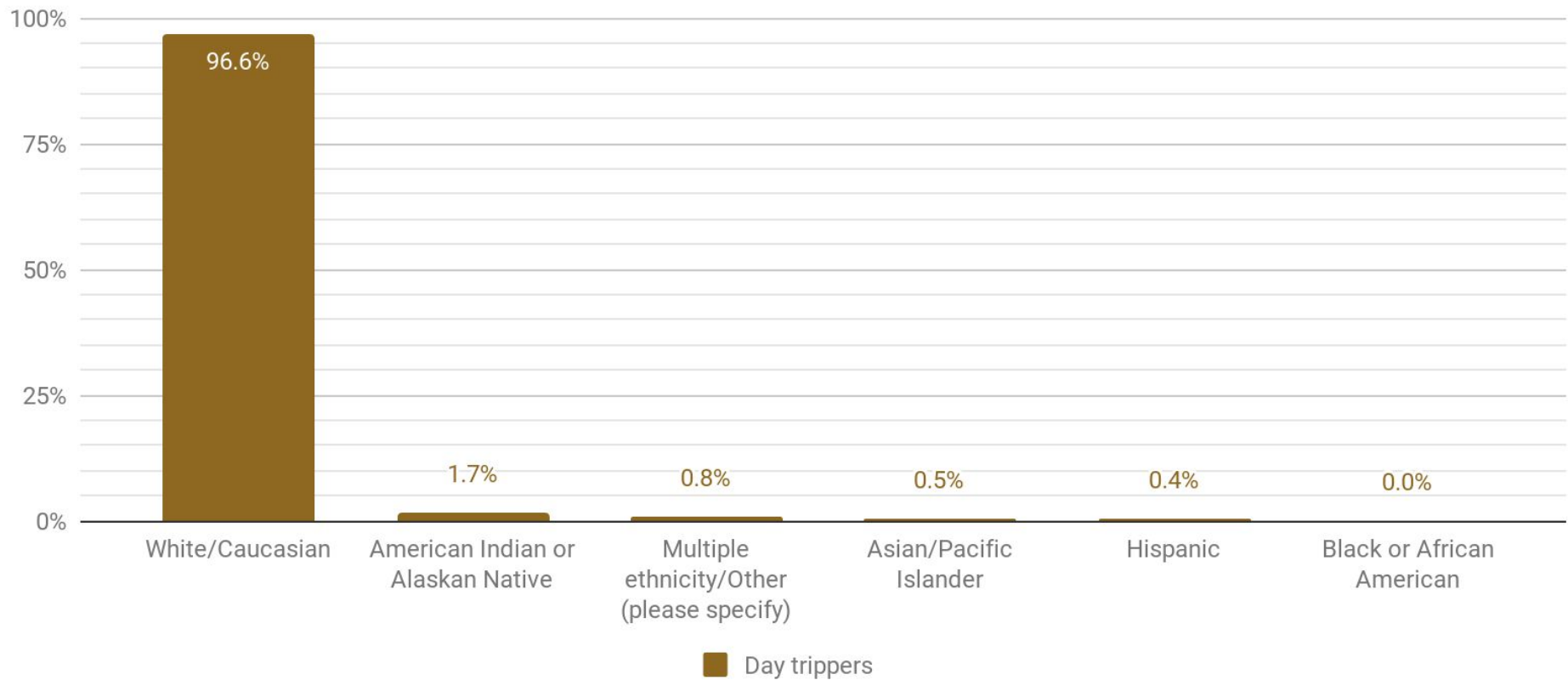
# Ethnicity

## All travelers



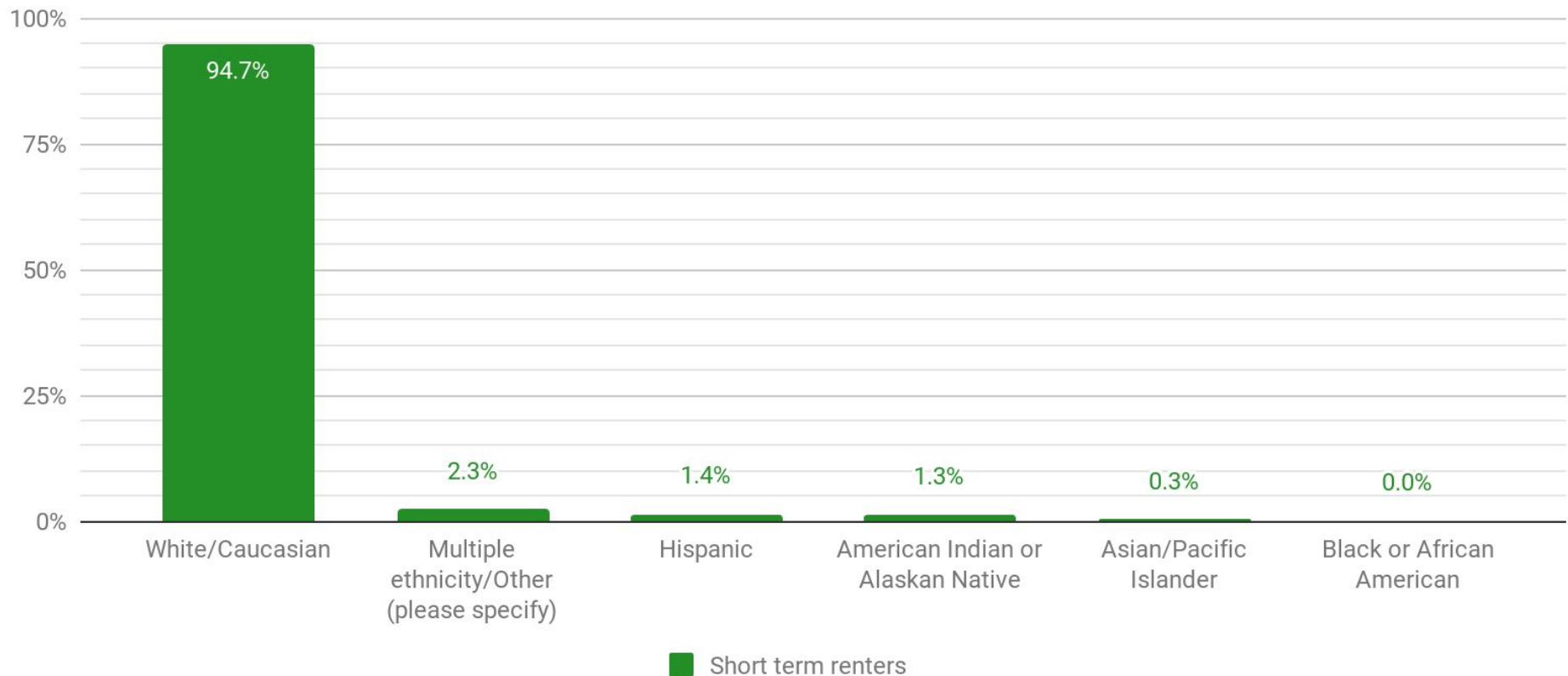
# Ethnicity

## Day trippers



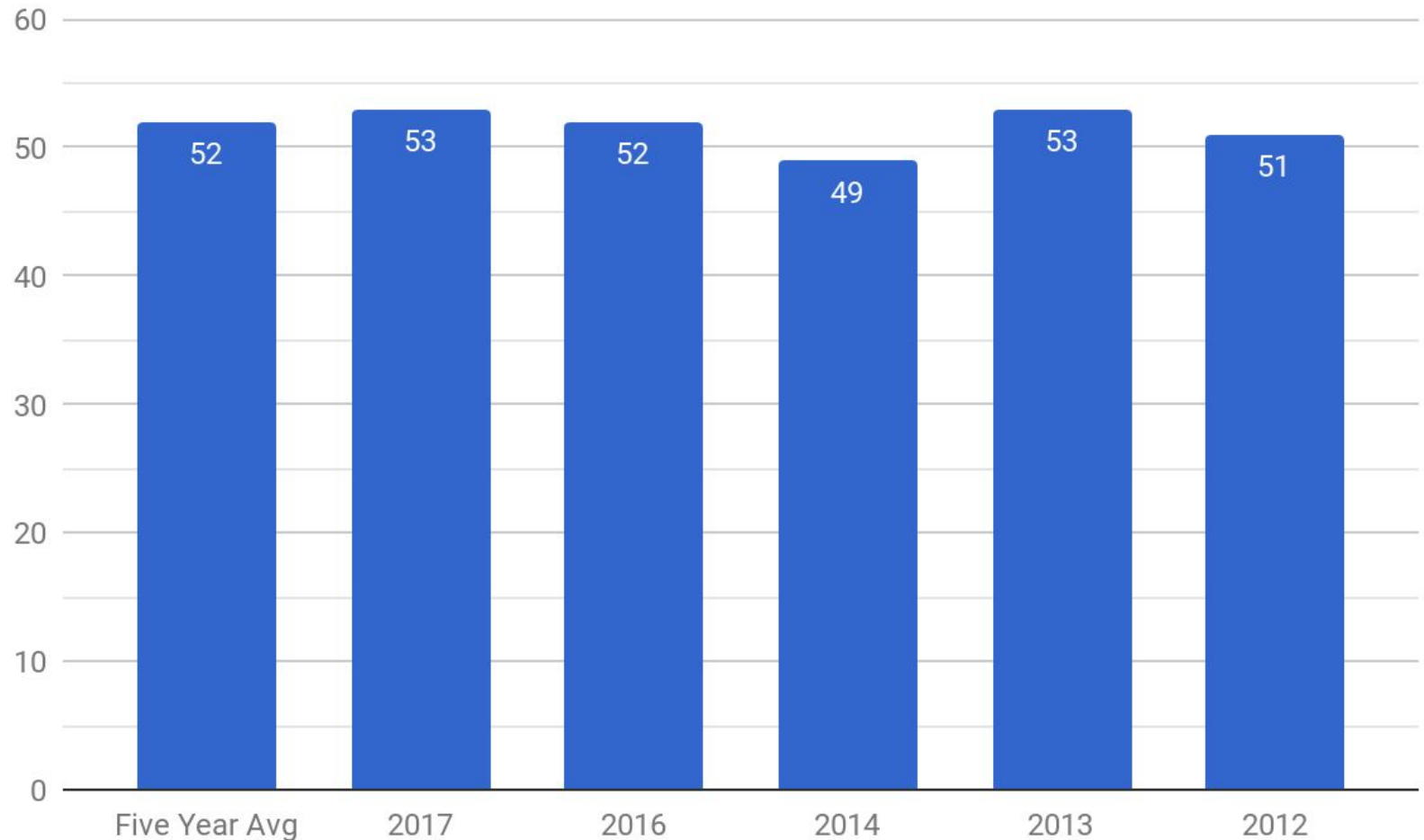
# Ethnicity

## Short term renters



# Five year average age\*

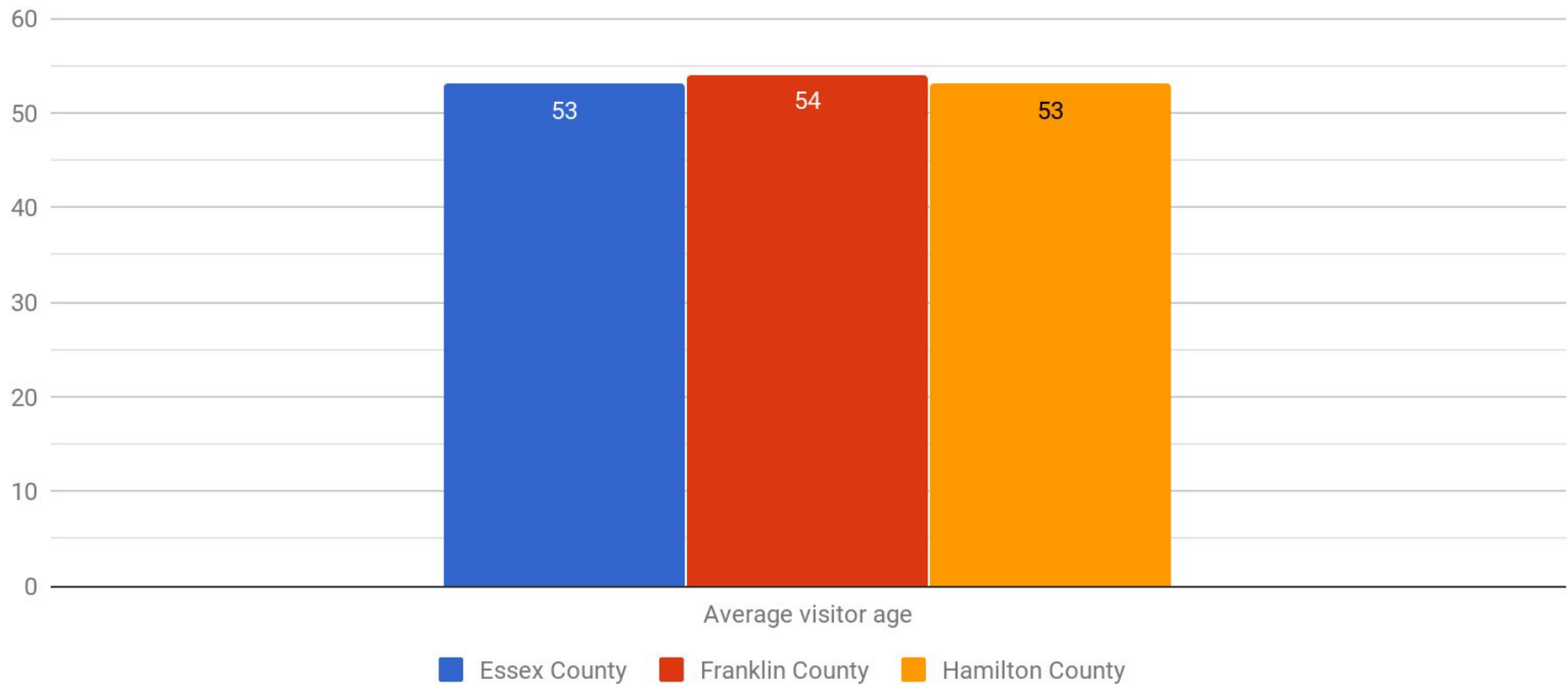
## All Essex County travelers



\* 2015 Survey was not conducted

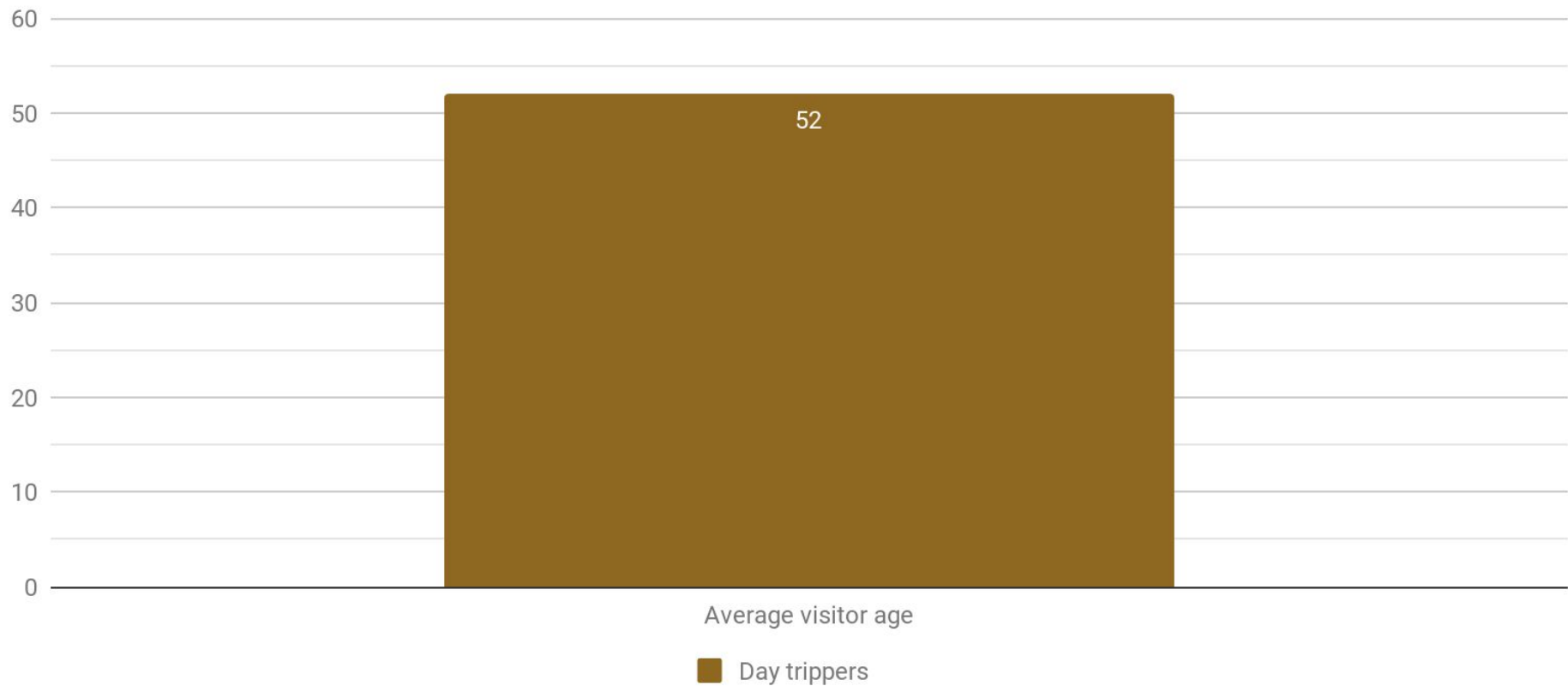
# Average age

## All travelers



# Average age

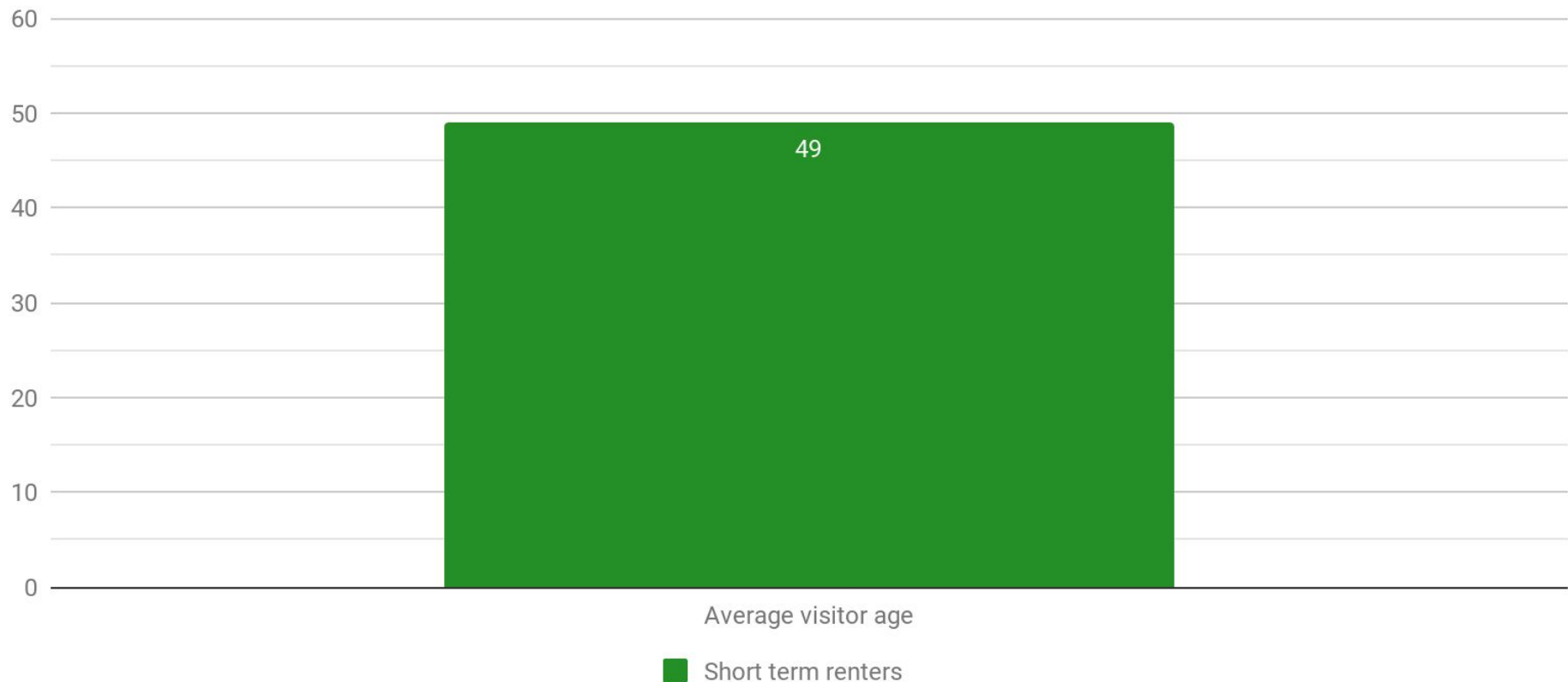
## Day trippers





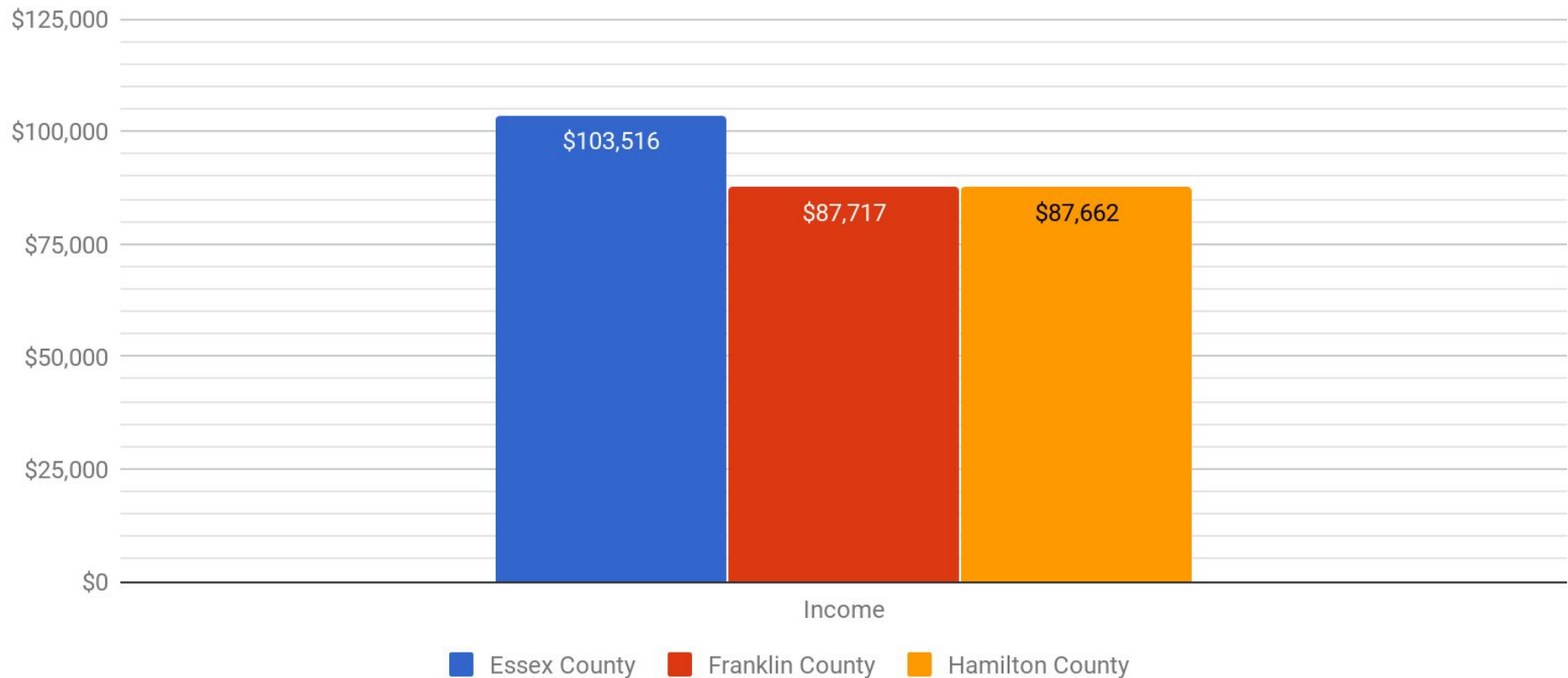
# Average age

## Short term renters



# Average income

## All travelers



# Average income

## Day trippers



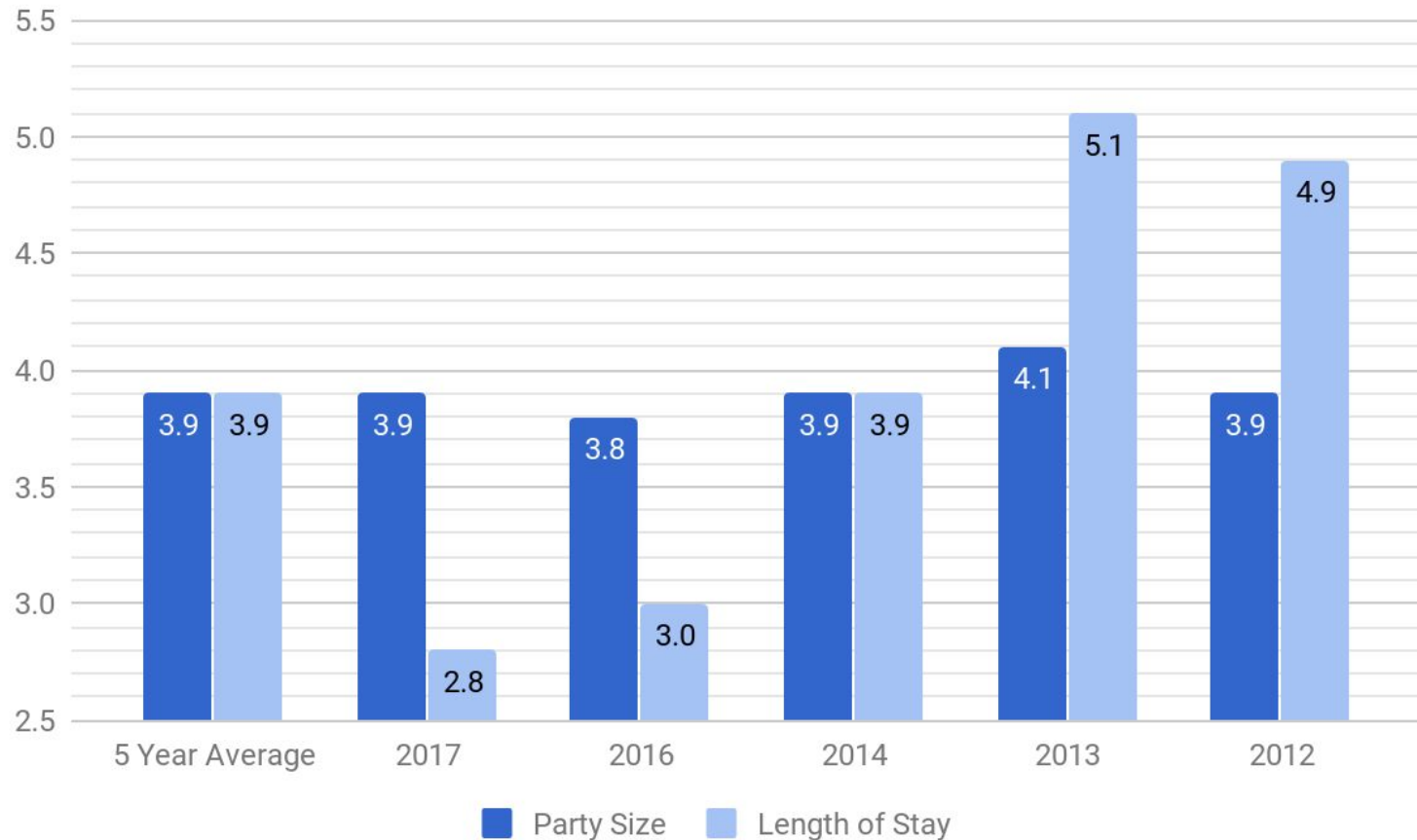
# Average income

## Short term renters



# Five year party size and length of stay\*

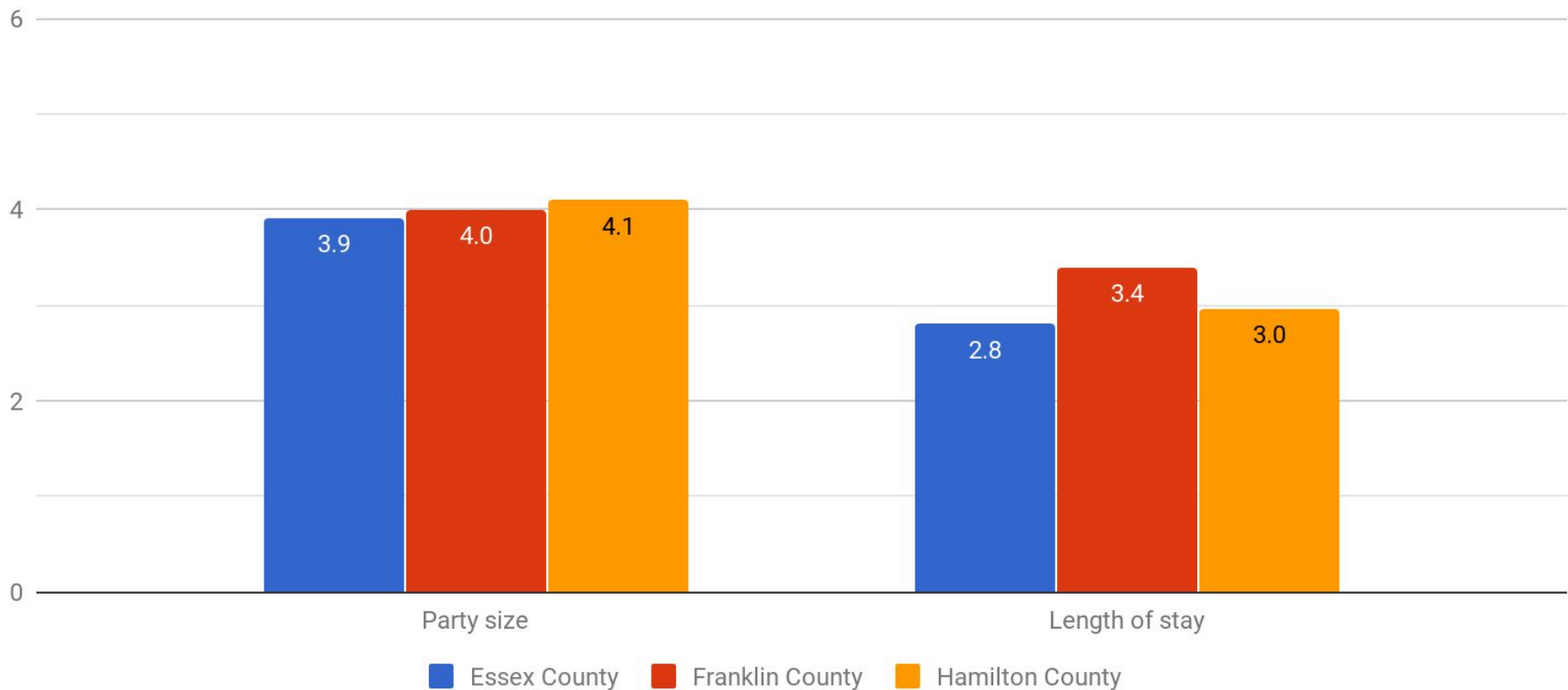
## All Essex County travelers



\* 2015 Survey was not conducted

# Party size/length of stay

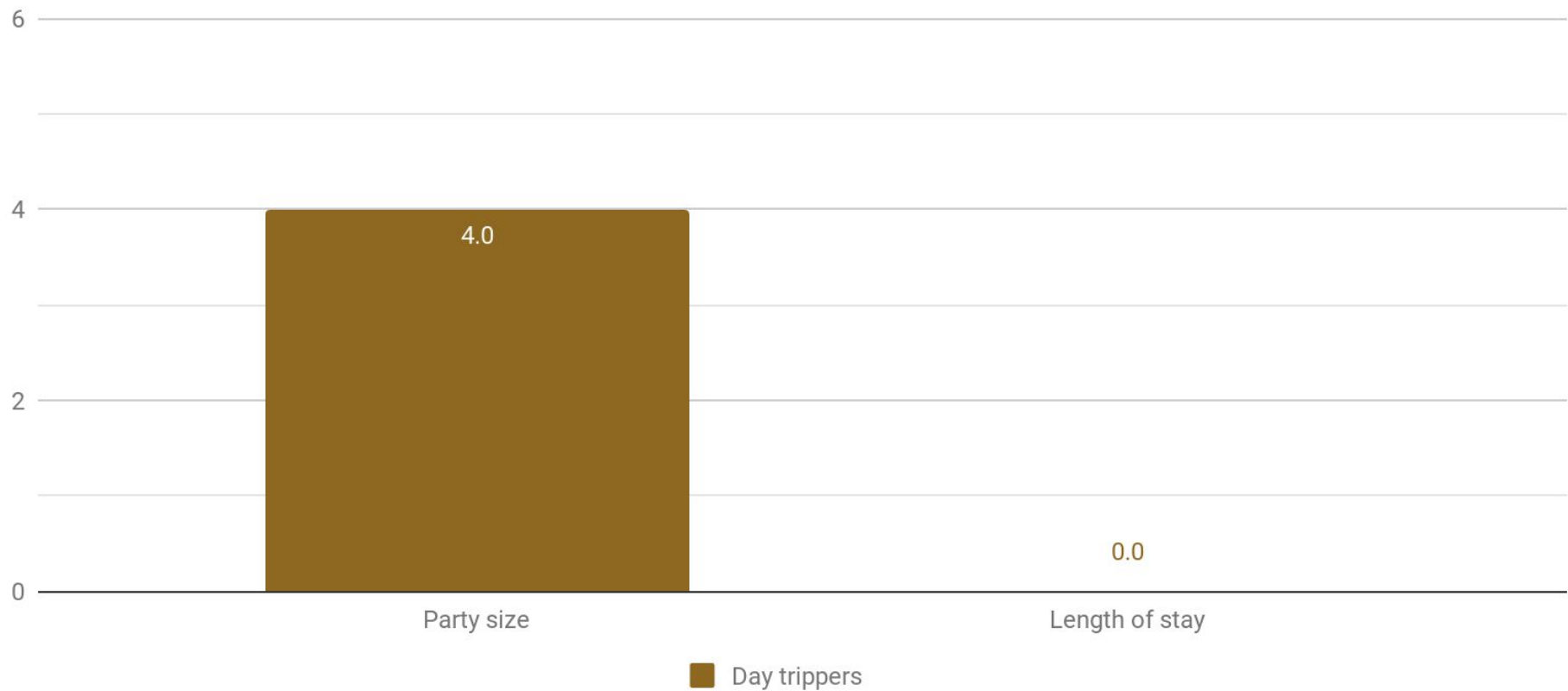
All travelers





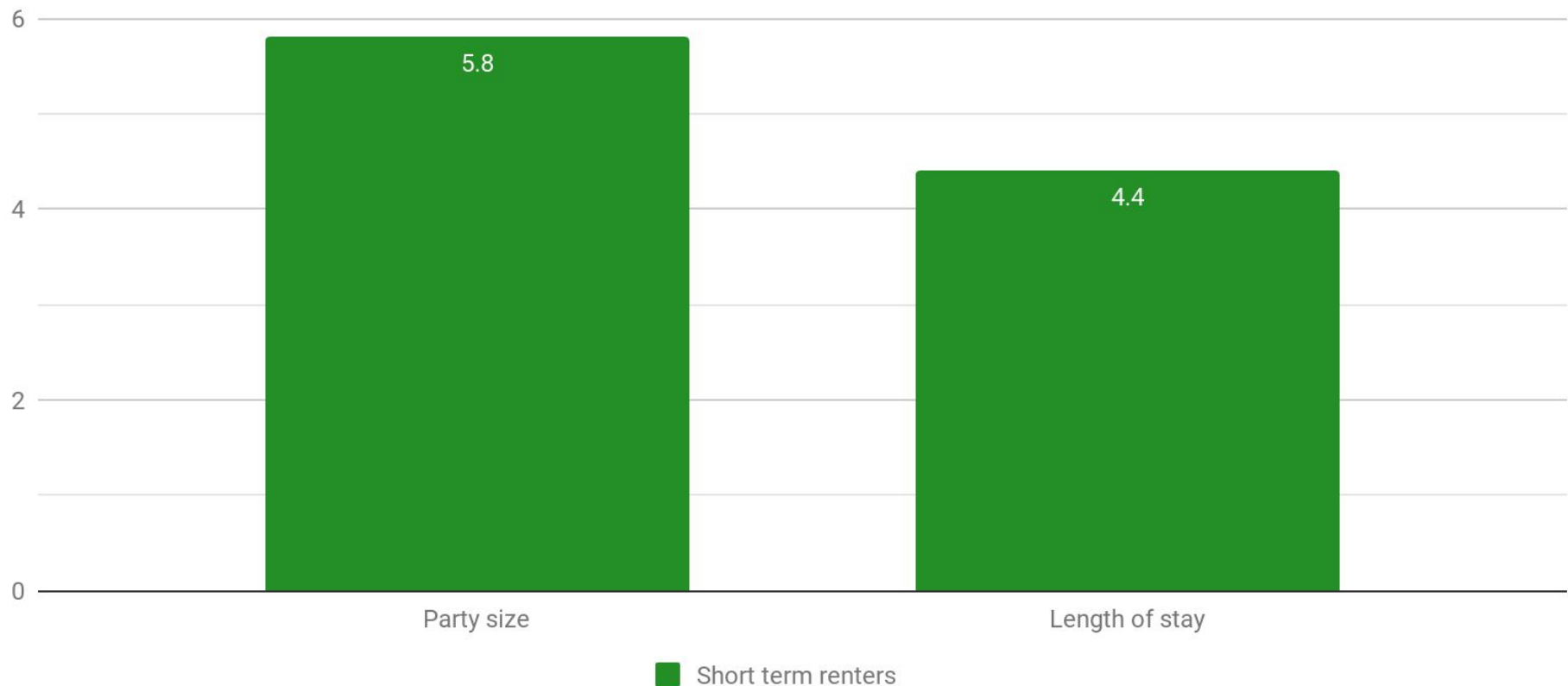
# Party size

## Day trippers



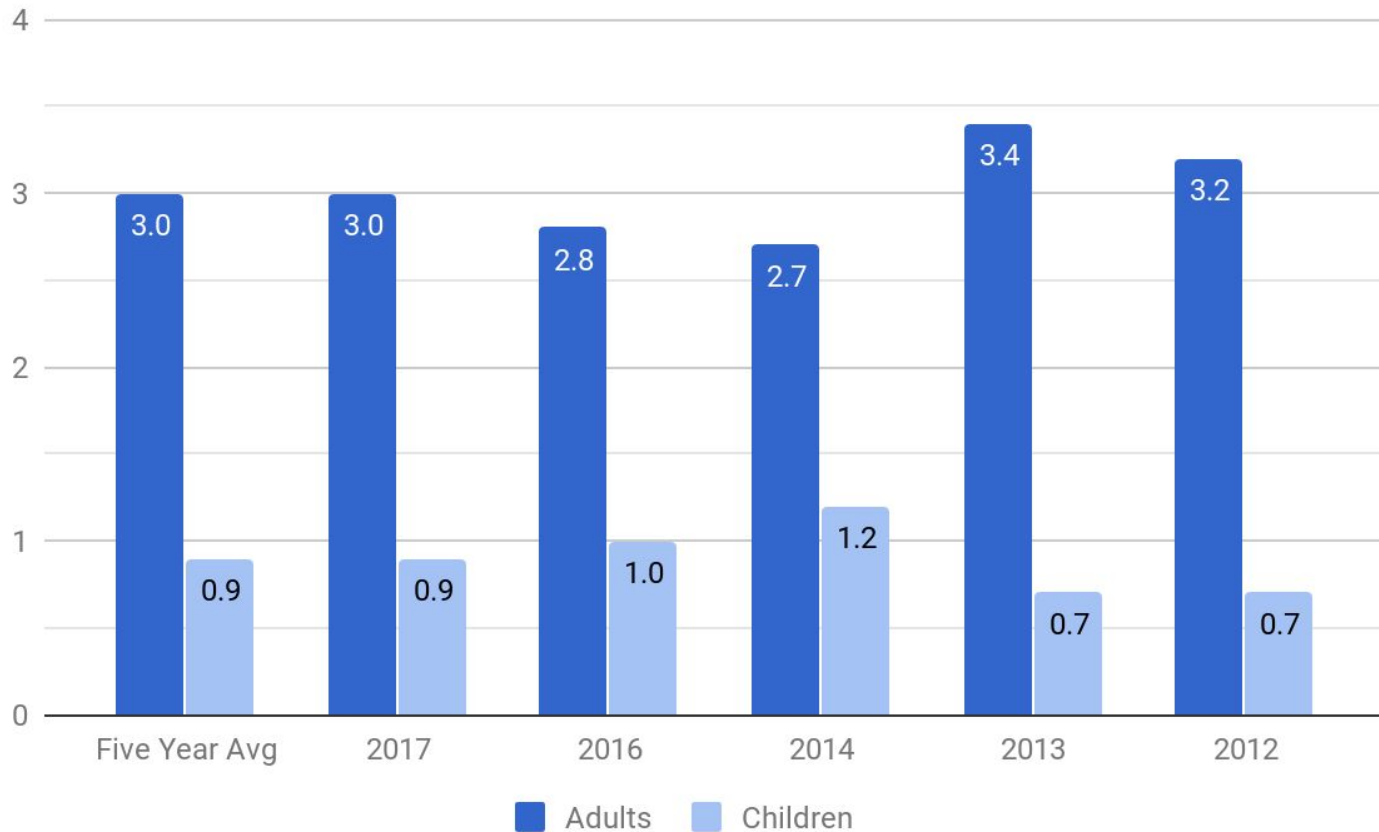
# Party size

## Short term renters



# Five year party composition\*

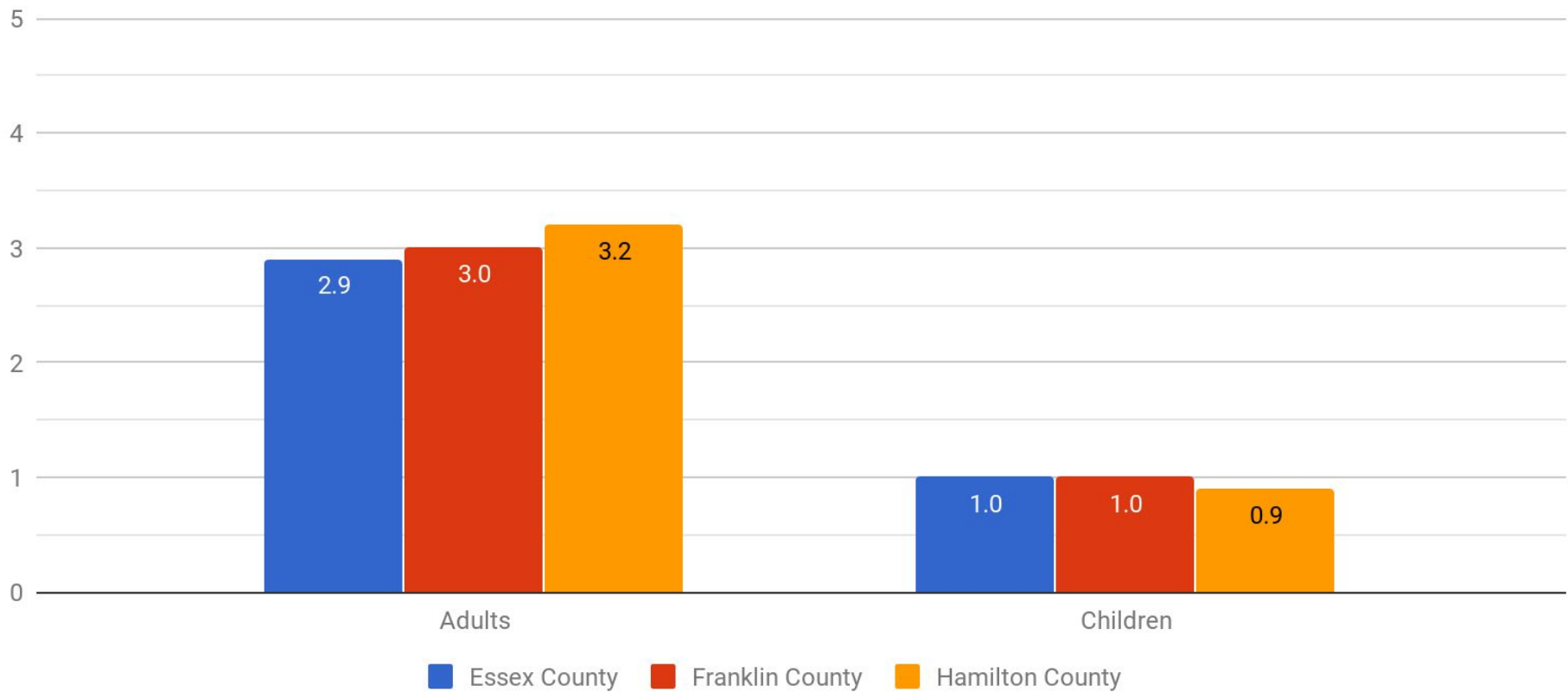
## All Essex County travelers



\* 2015 Survey was not conducted

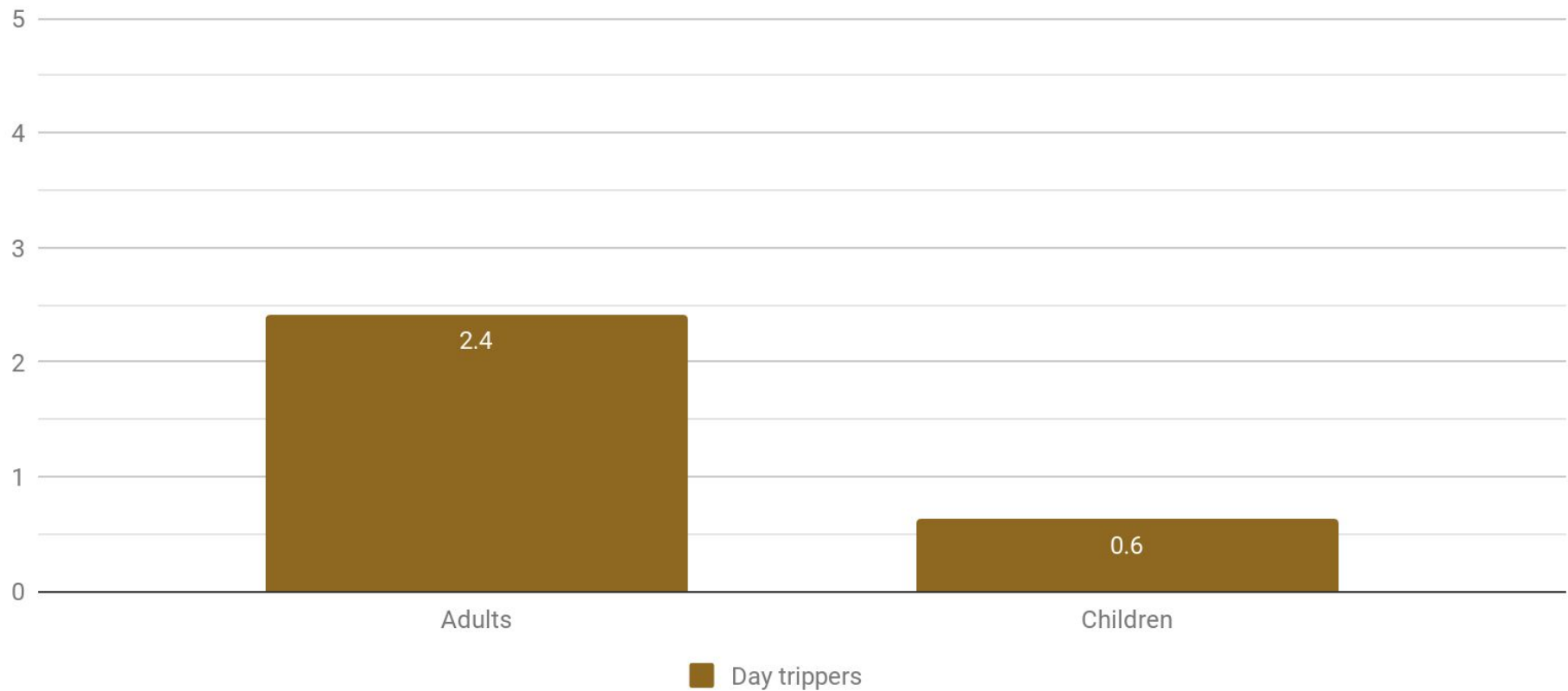
# Party composition

## All travelers



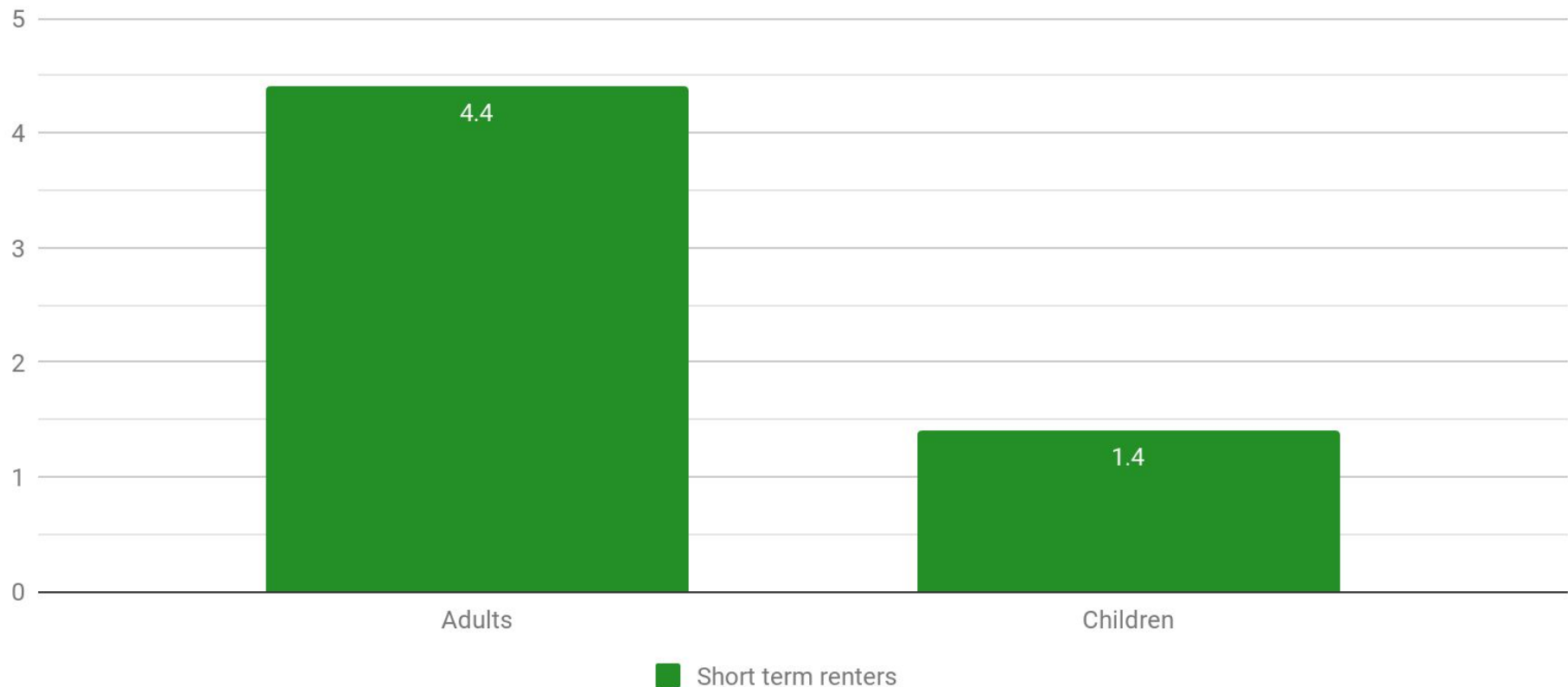
# Party composition

## Day trippers



# Party composition

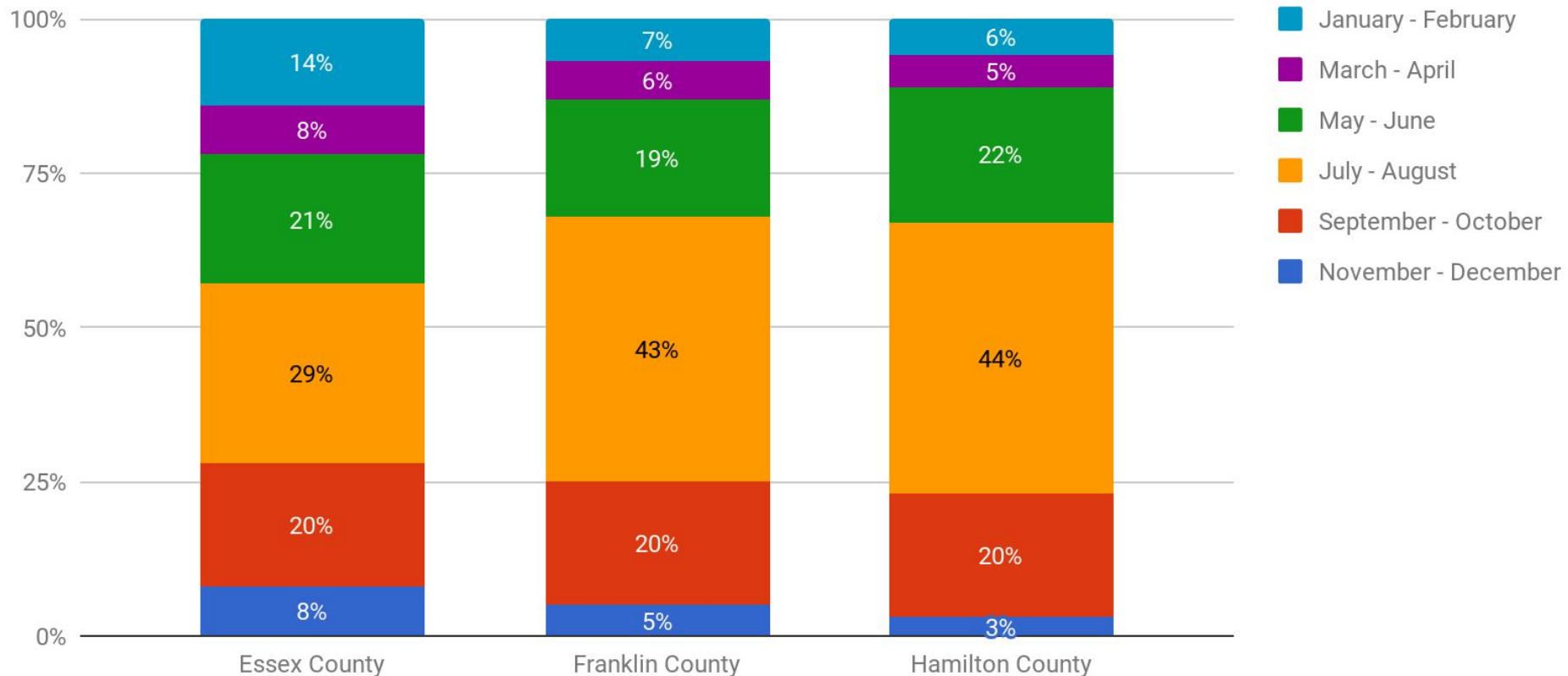
## Short term renters





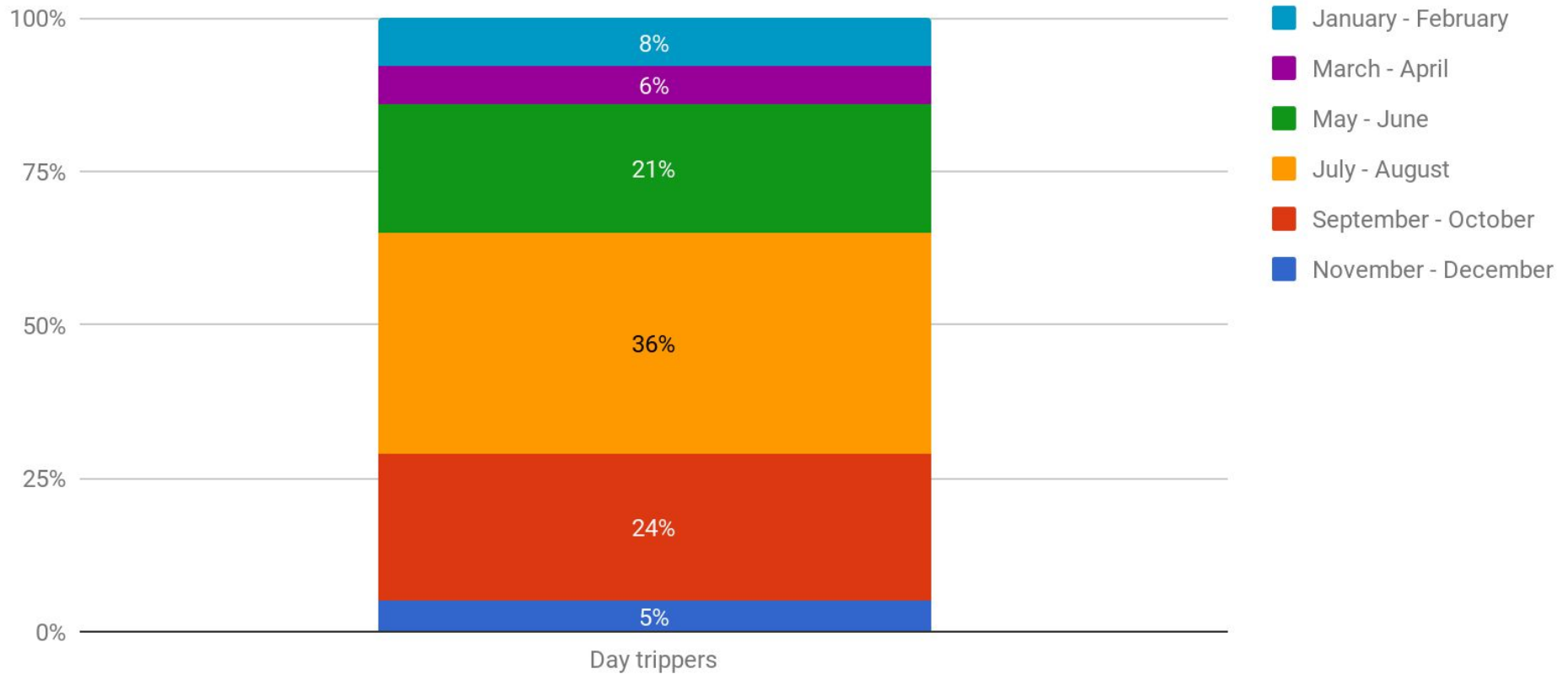
# Time of year visited

## All travelers



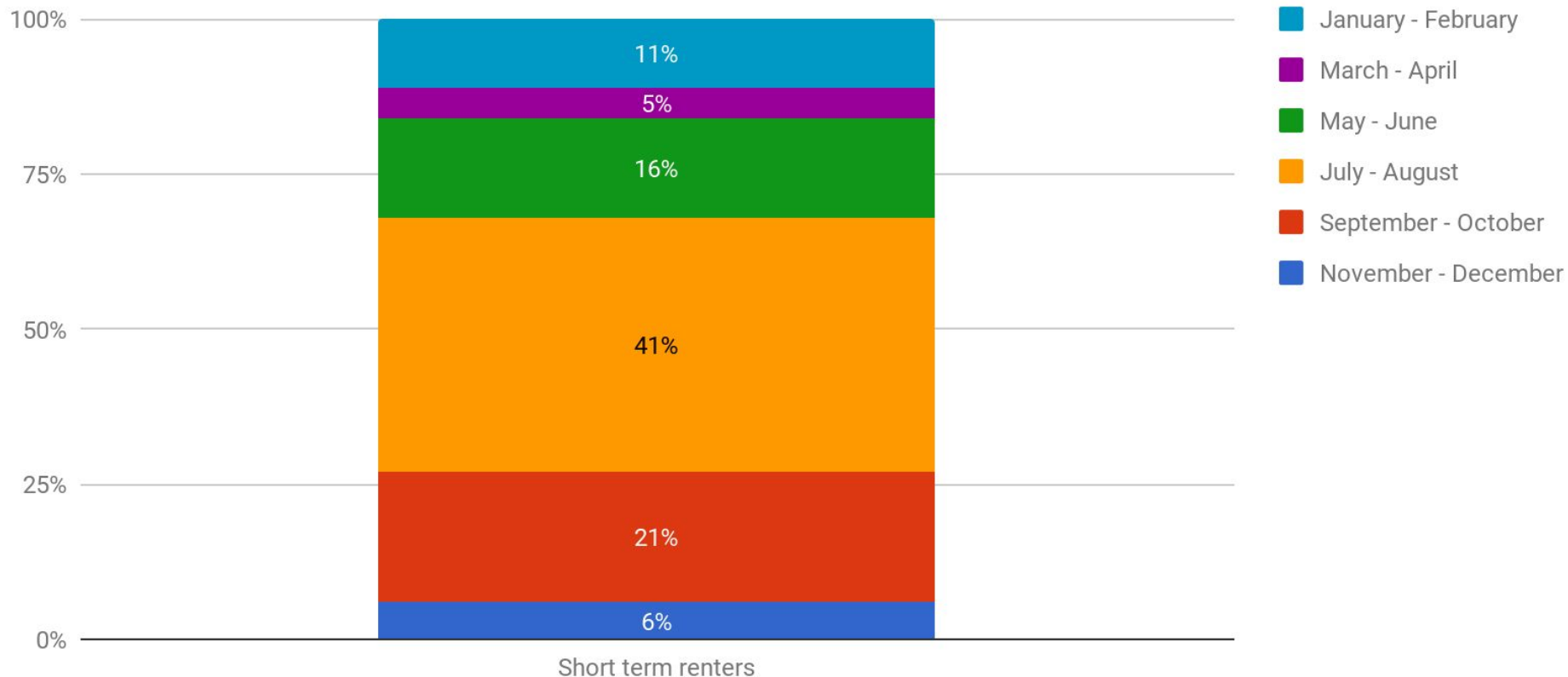
# Time of year visited

## Day trippers



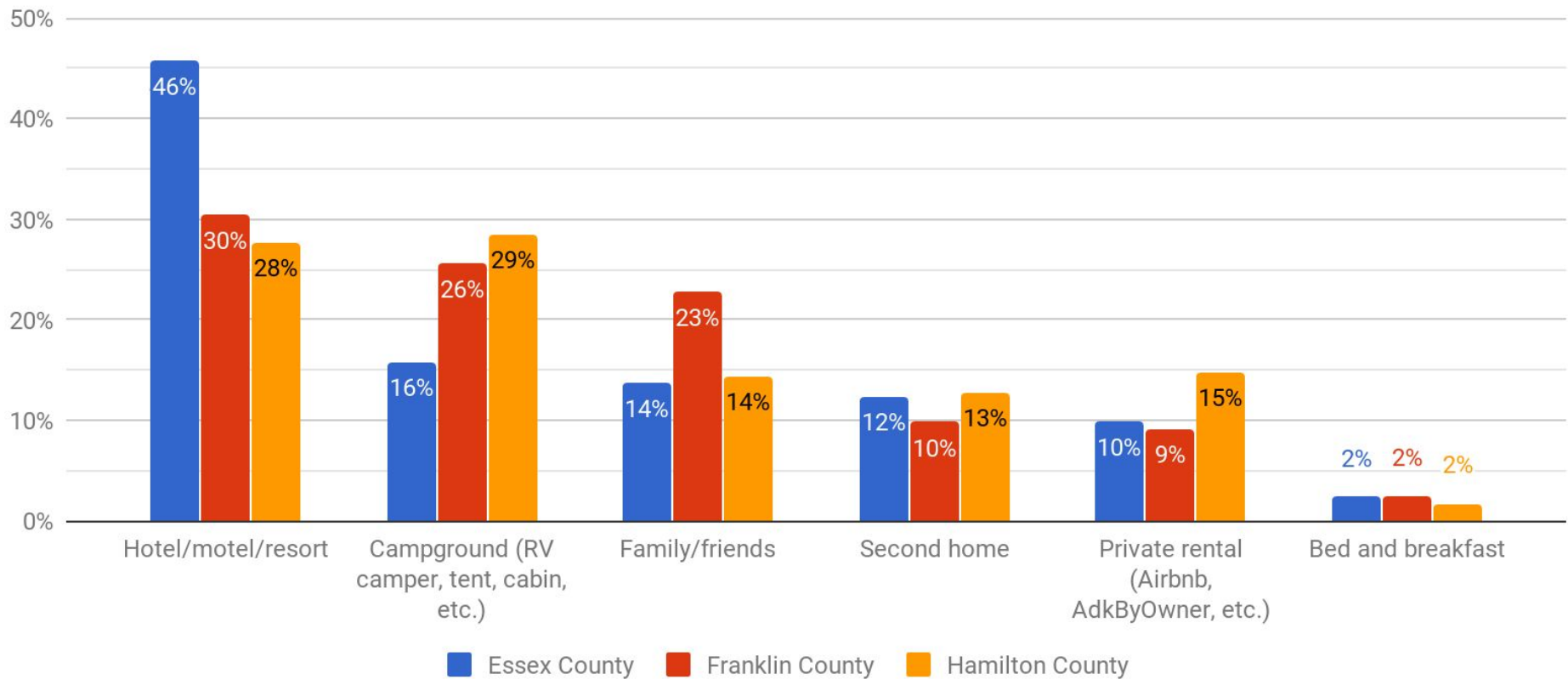
# Time of year visited

## Short term renters



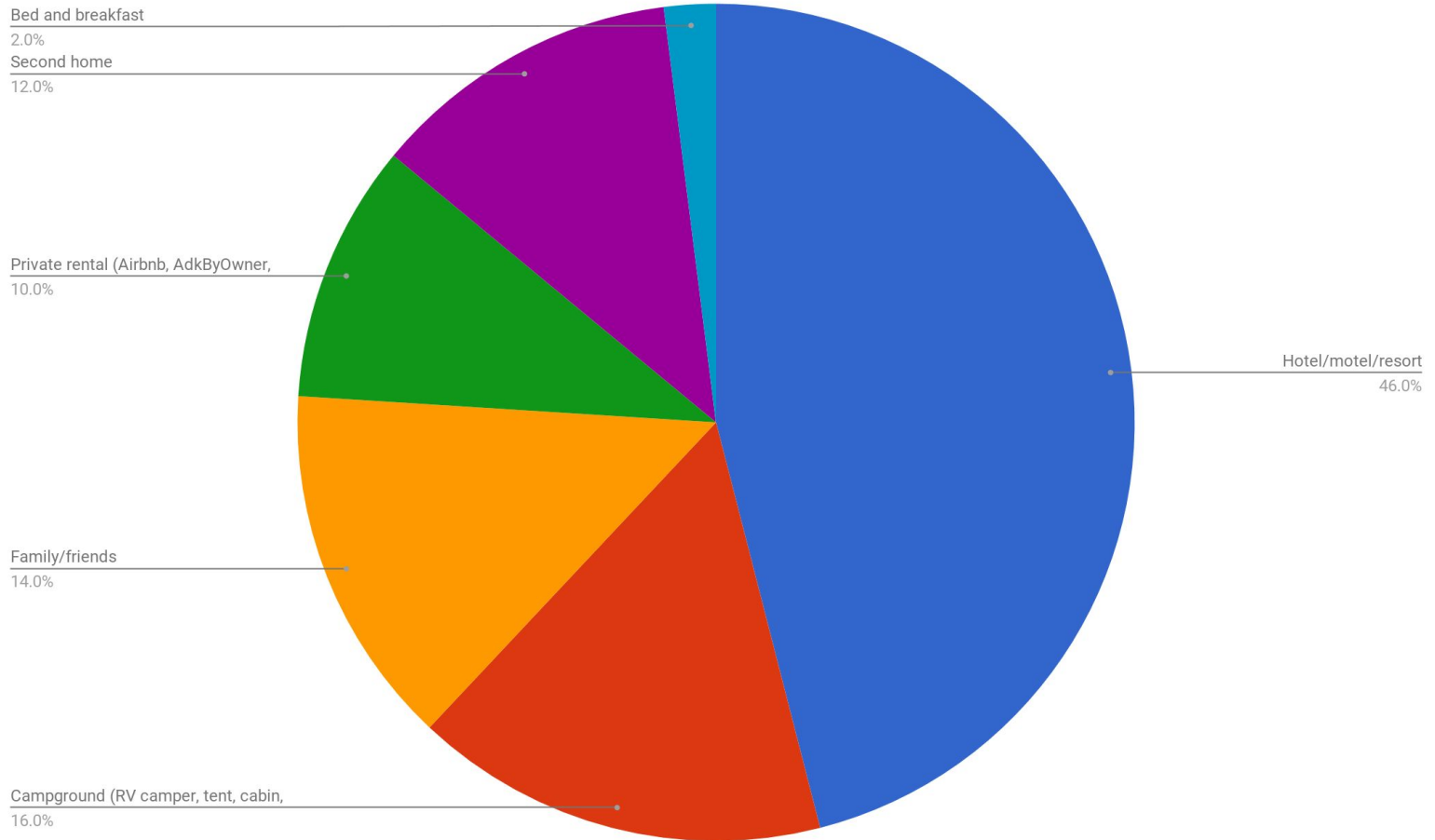
# Lodging accommodations

## All overnight travelers



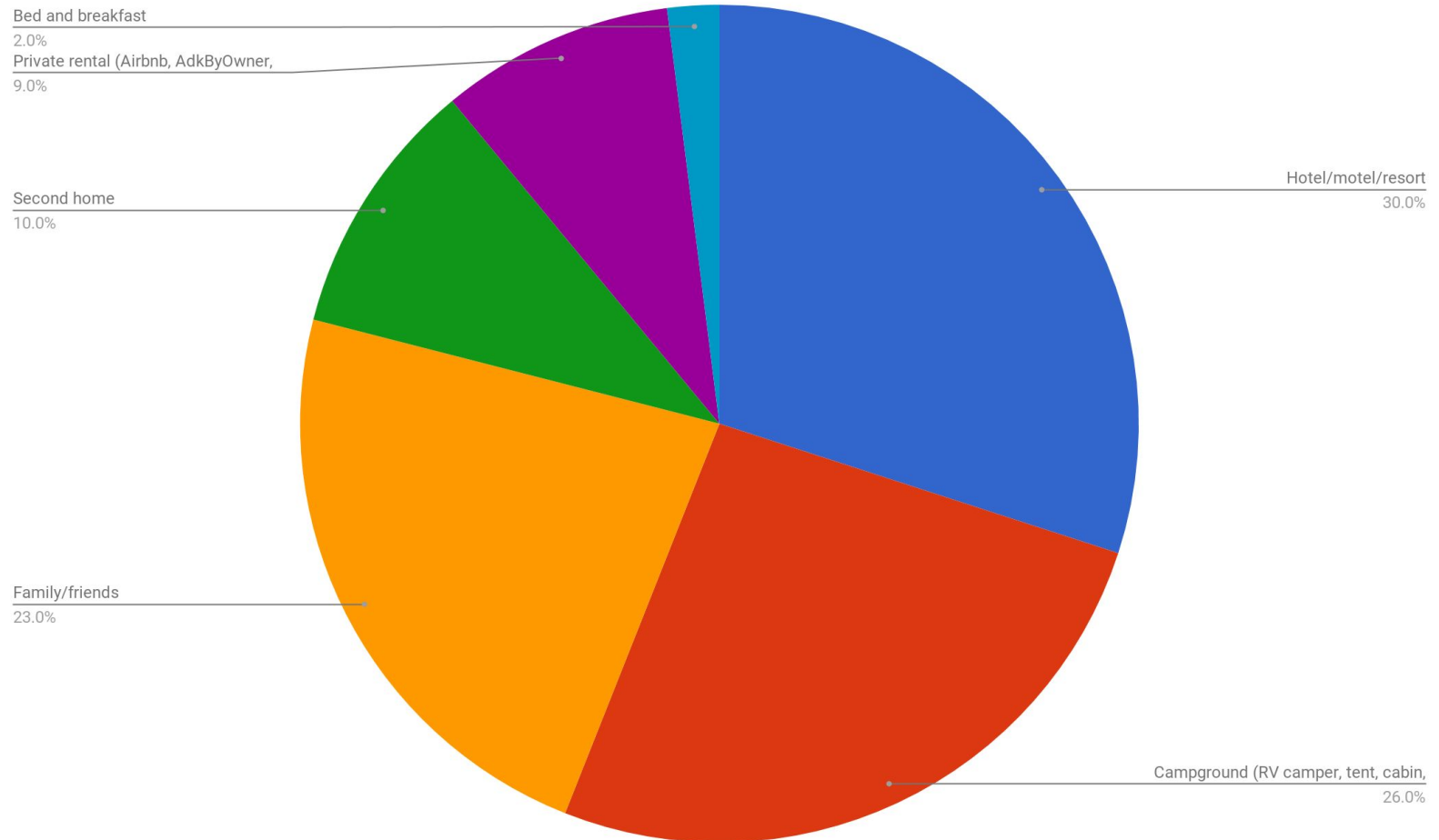
# Lodging accommodations

## All overnight Essex County travelers



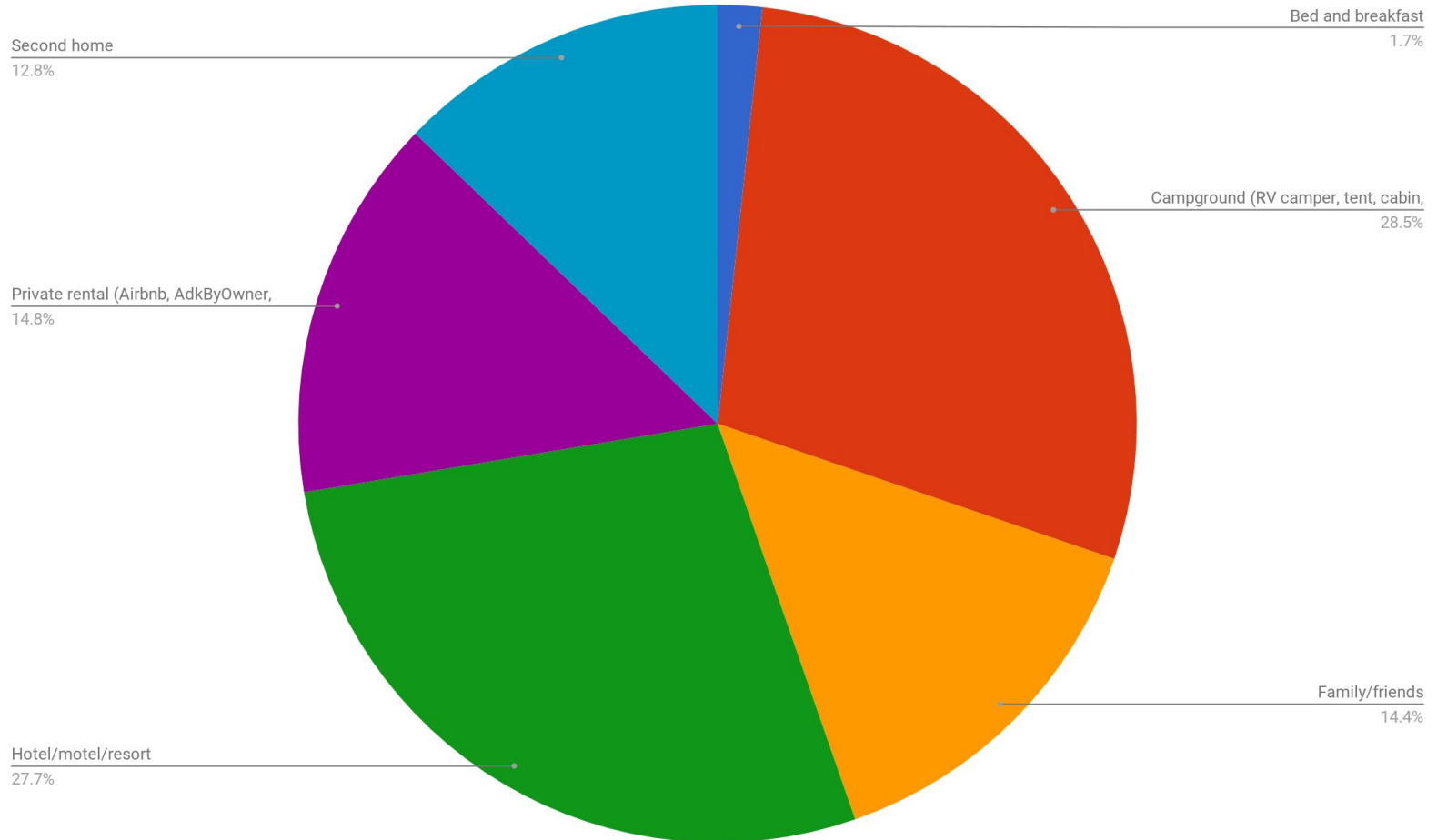
# Lodging accommodations

## All overnight Franklin County travelers



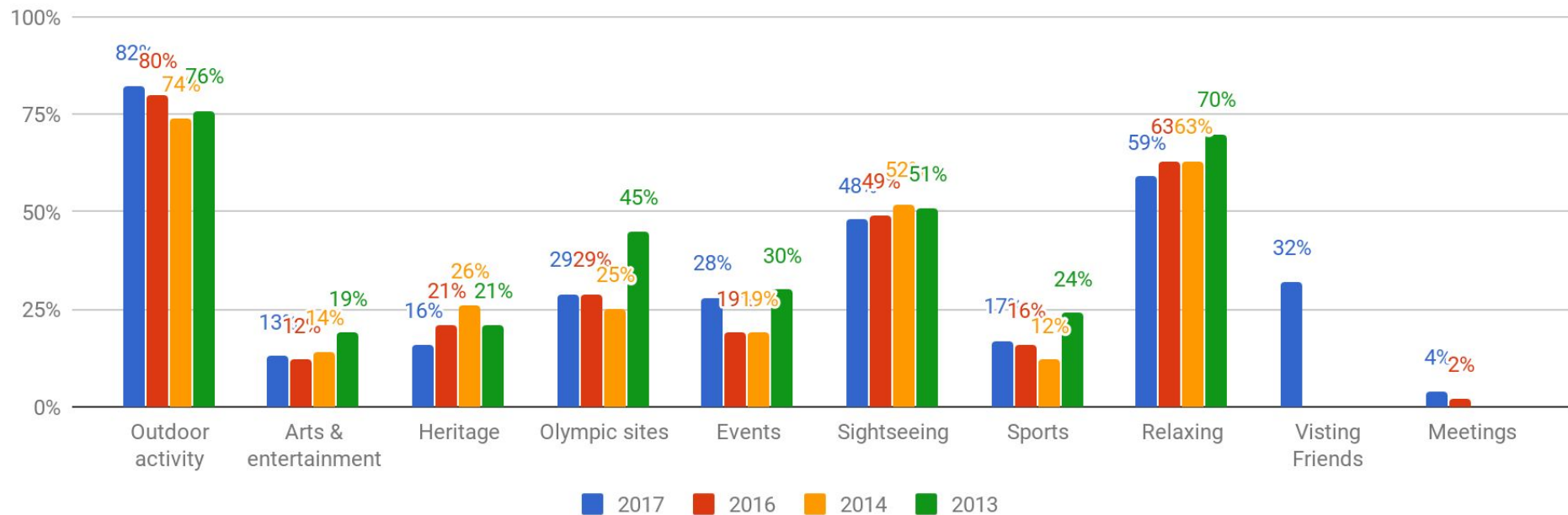
# Lodging accommodations

## All overnight Hamilton County travelers



# Four year key attractions\*

## All Essex County travelers

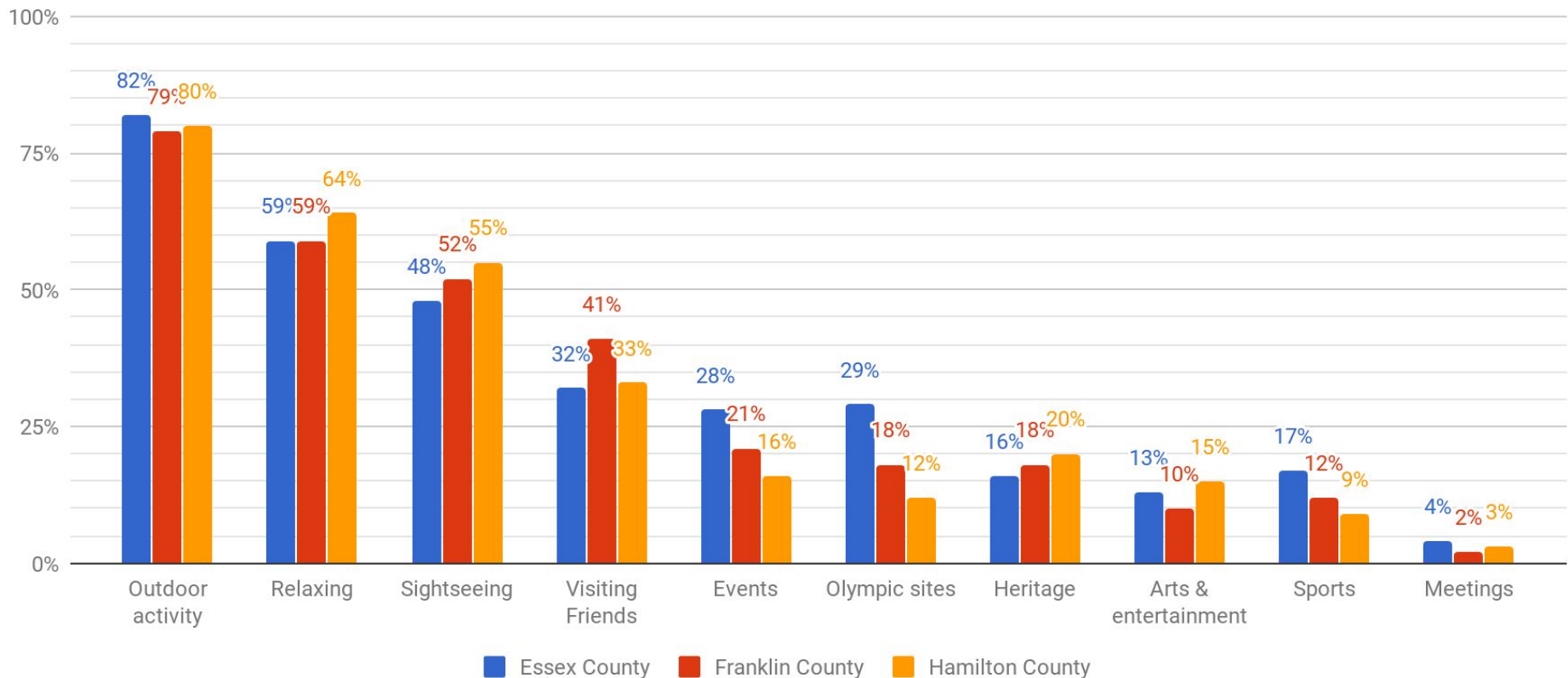


\* 2015 Survey was not conducted



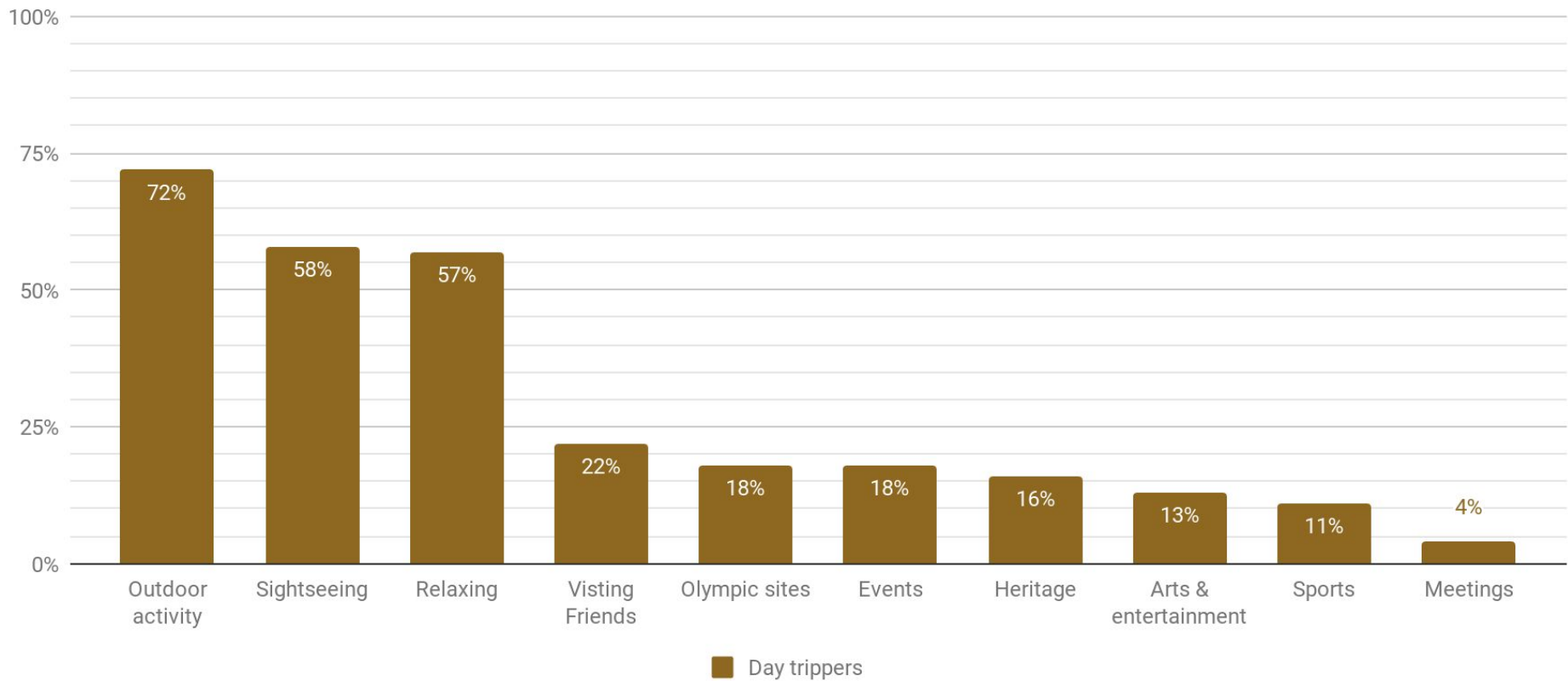
# Key attractions

## All travelers



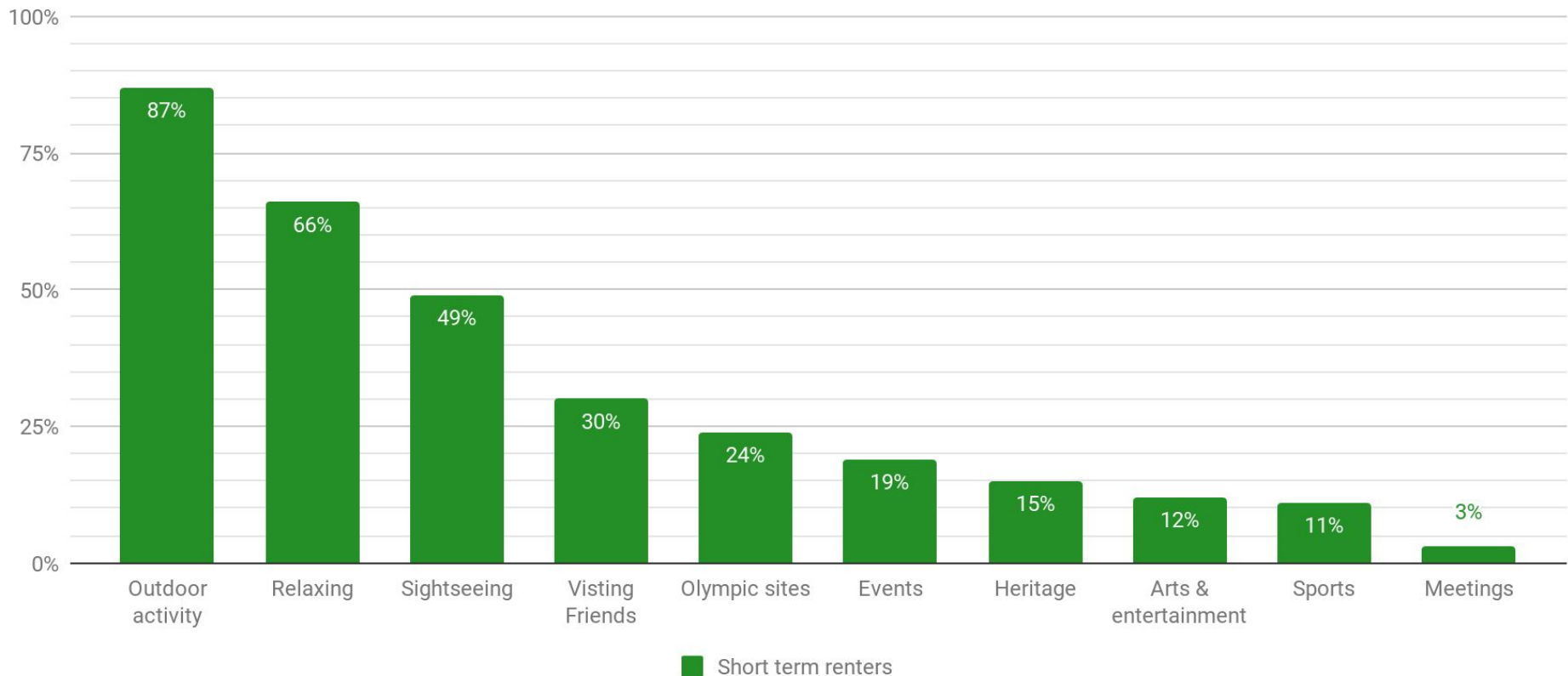
# Key attractions

## Day trippers



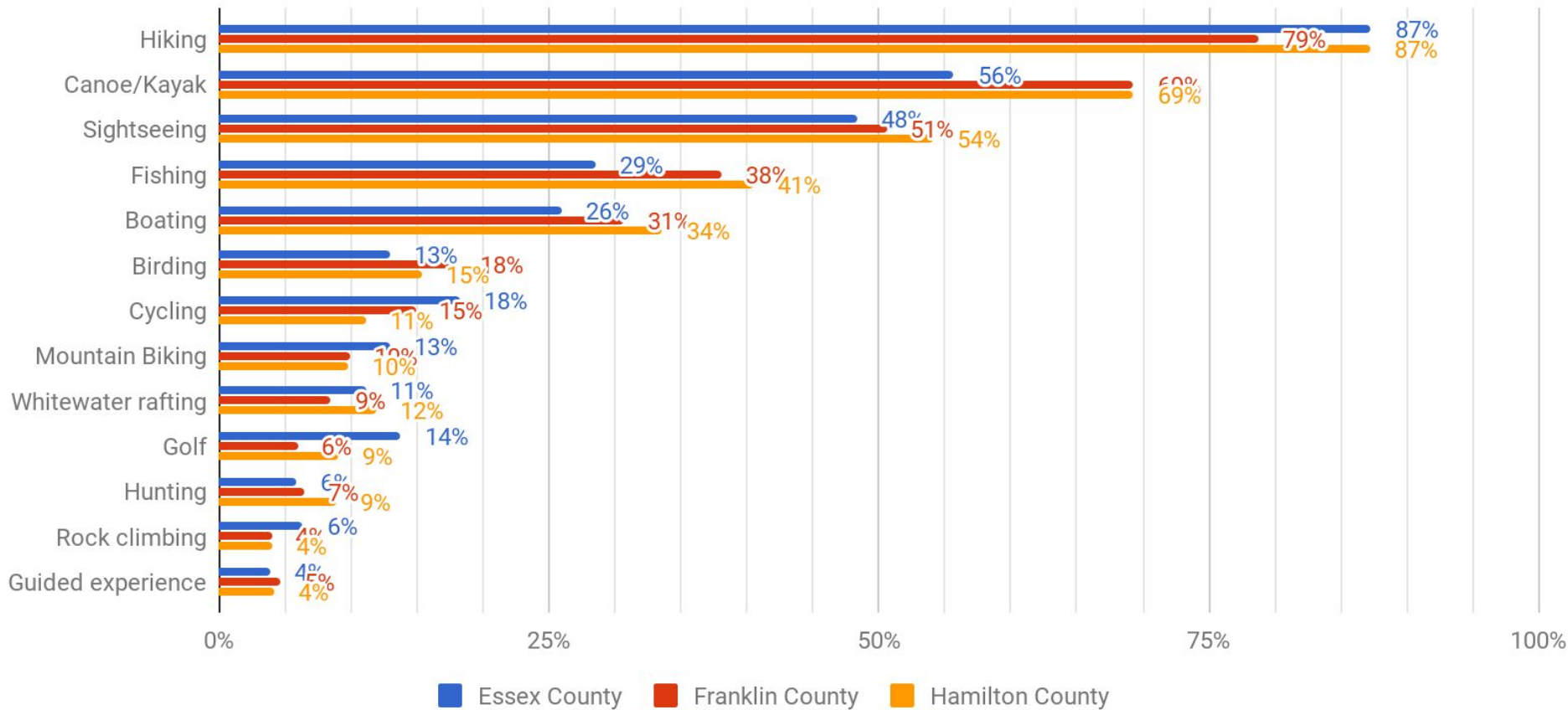
# Key attractions

## Short term renters



# Outdoor spring/summer activities\*

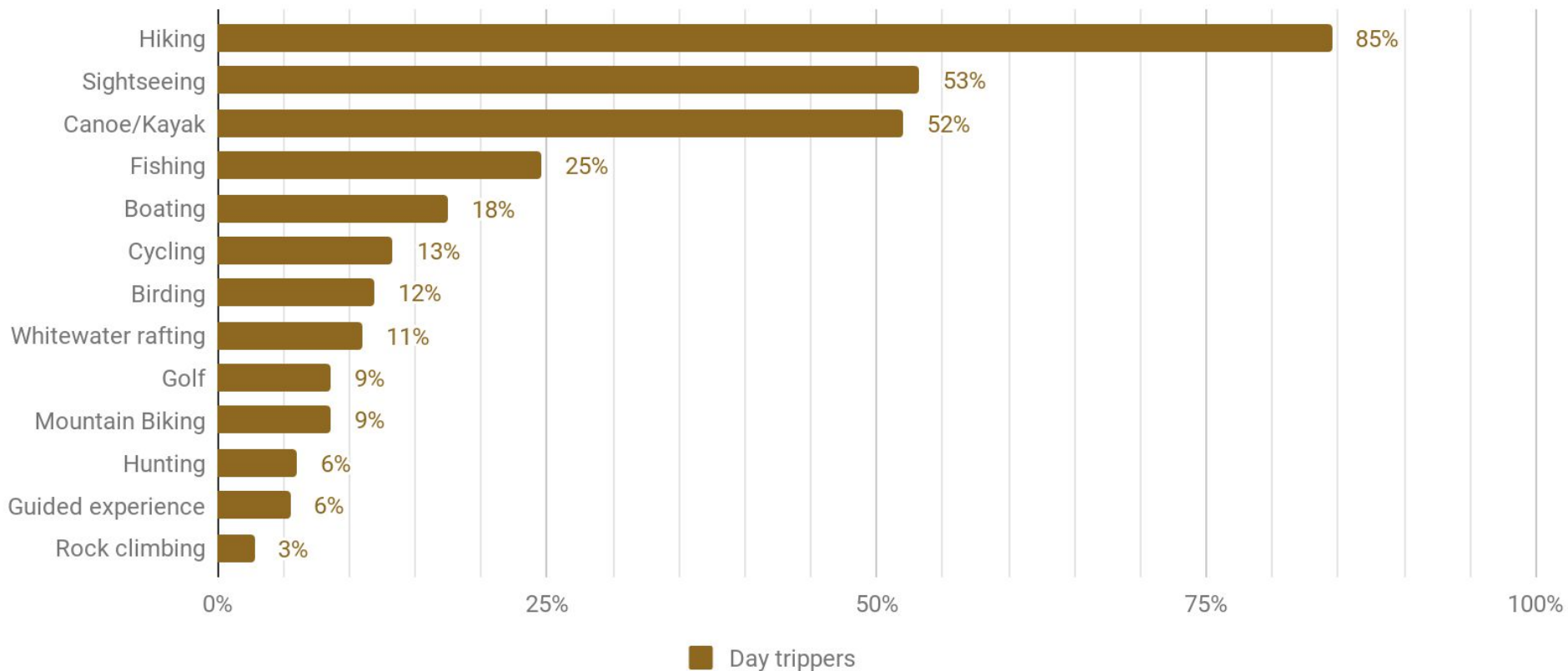
## All travelers



\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity

# Outdoor spring/summer activities\*

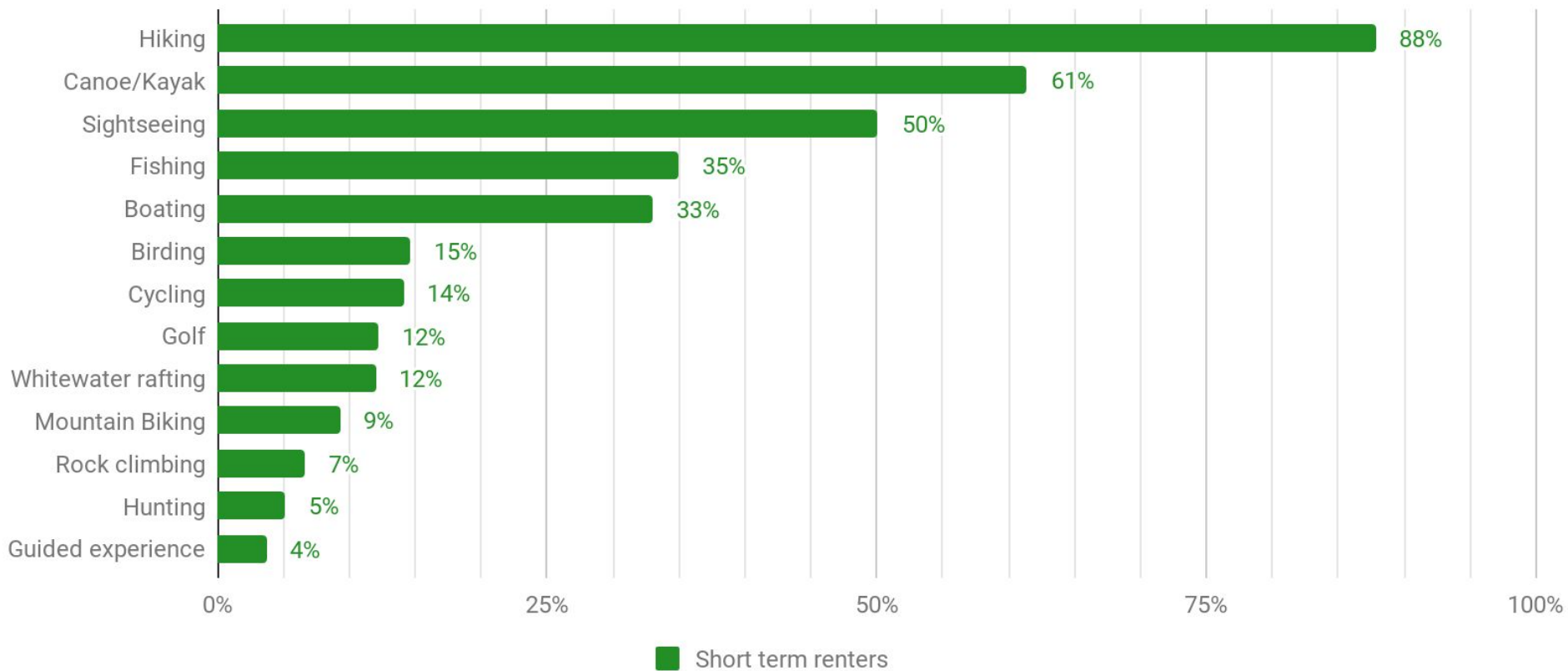
## Day trippers



\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity

# Outdoor spring/summer activities\*

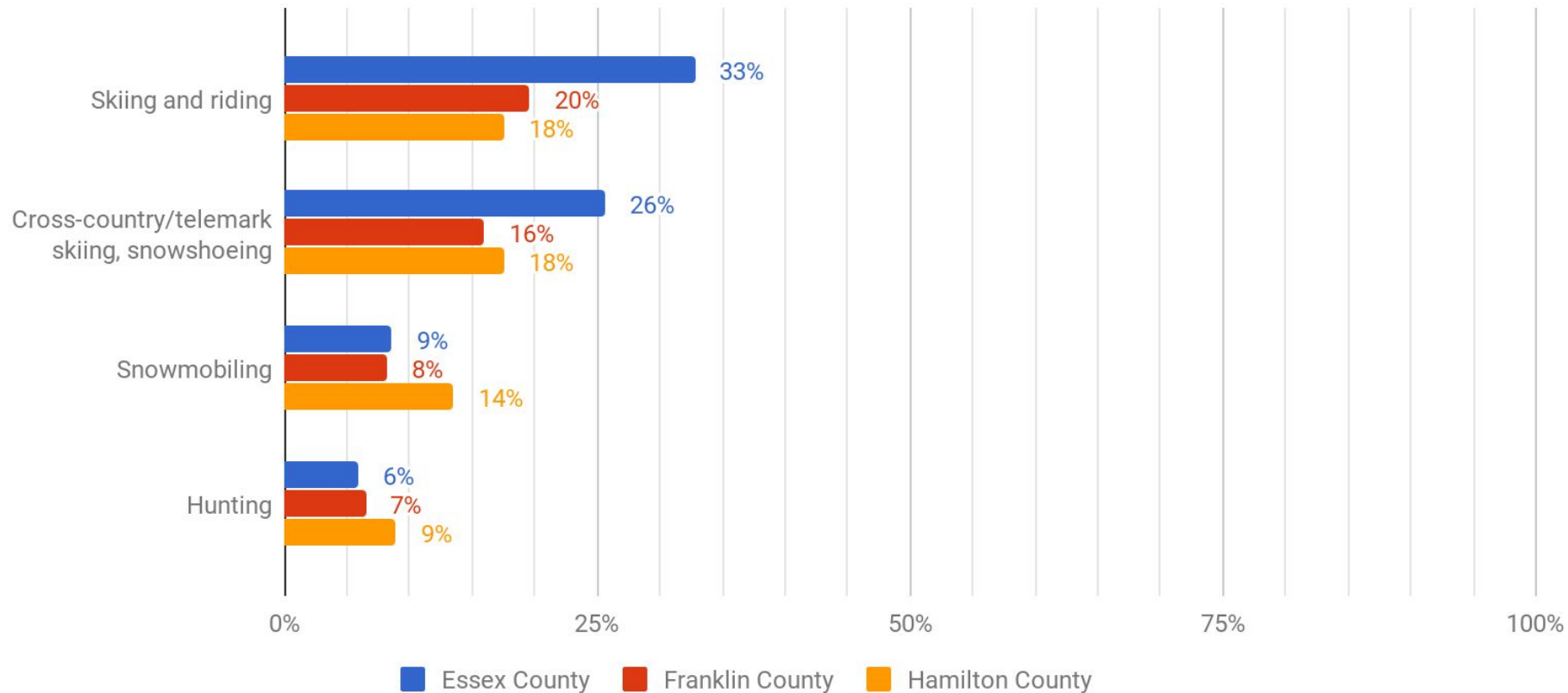
## Short term renters



\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity

# Outdoor fall/winter activities\*

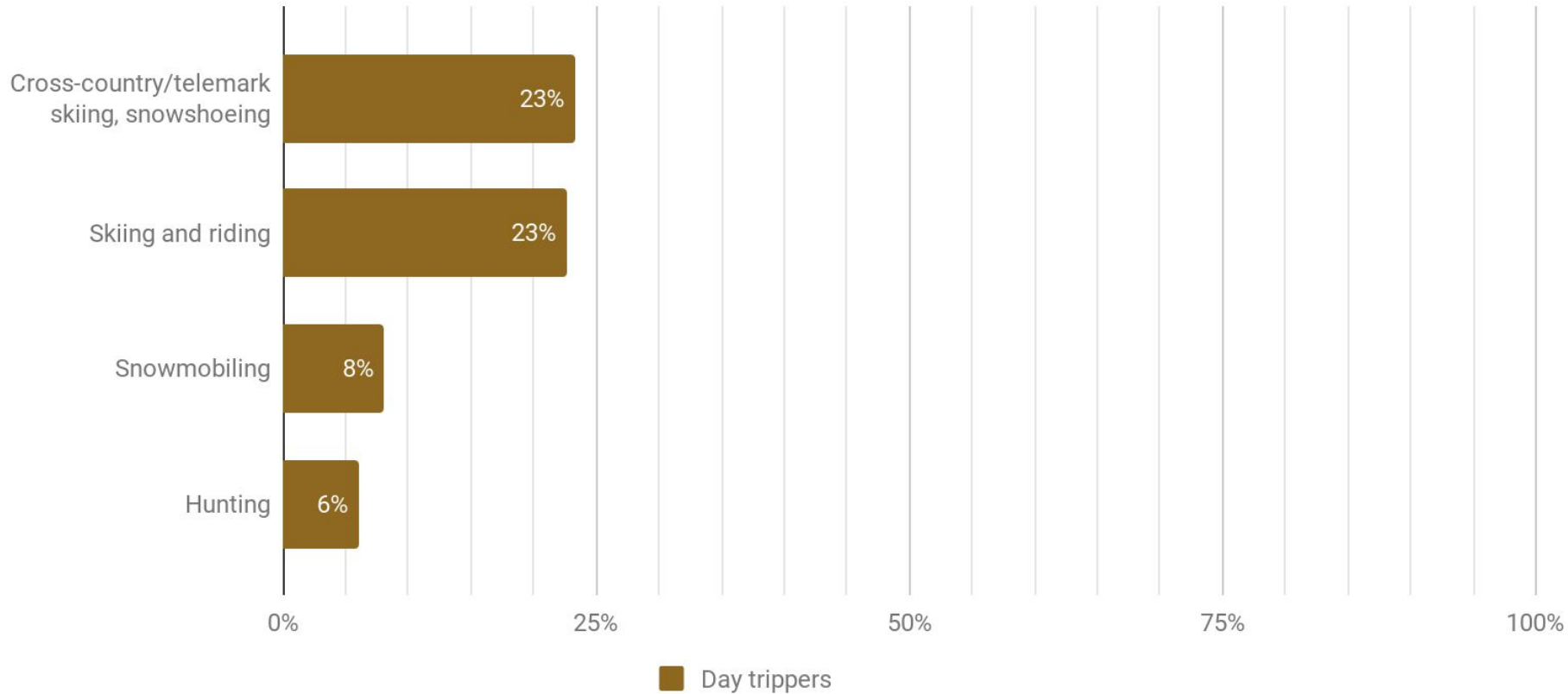
## All travelers



\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity

# Outdoor fall/winter activities\*

## Day trippers

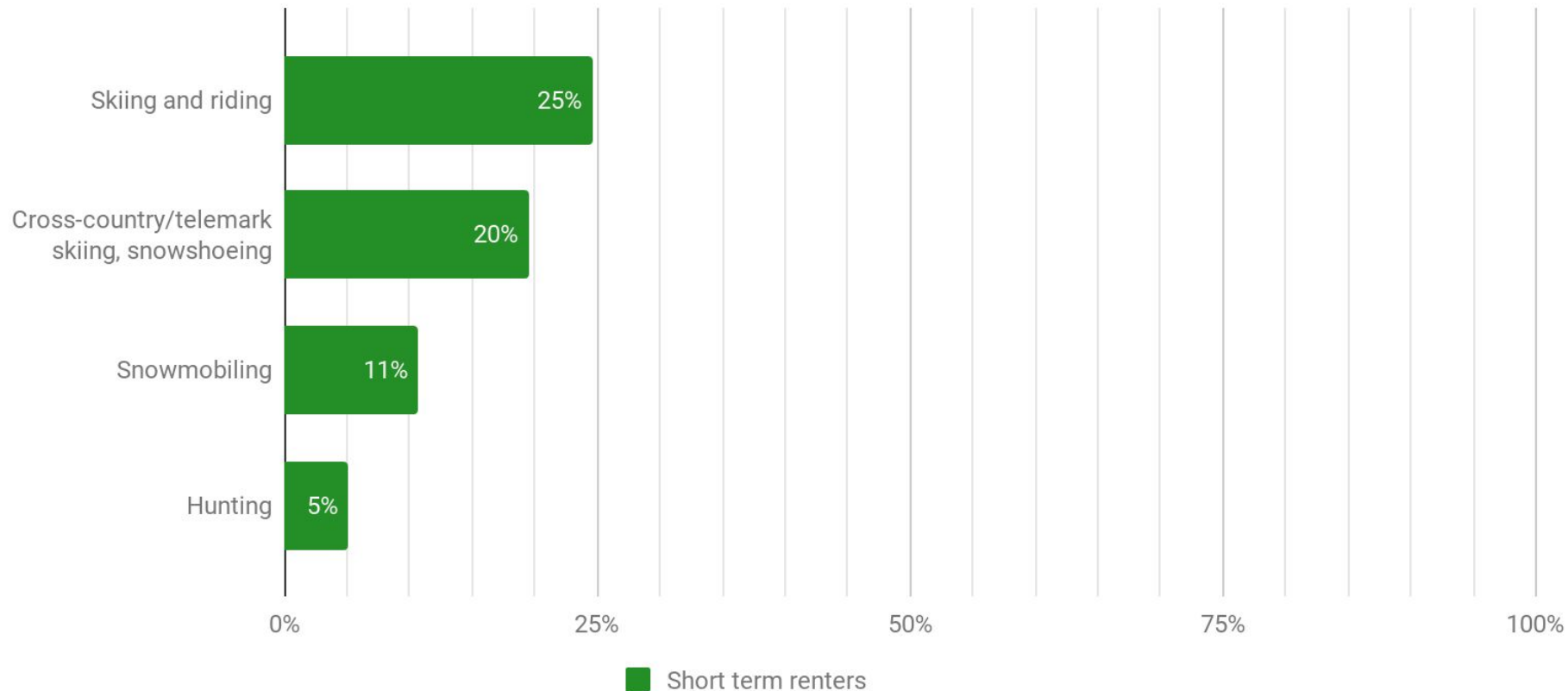


\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity



# Outdoor fall/winter activities\*

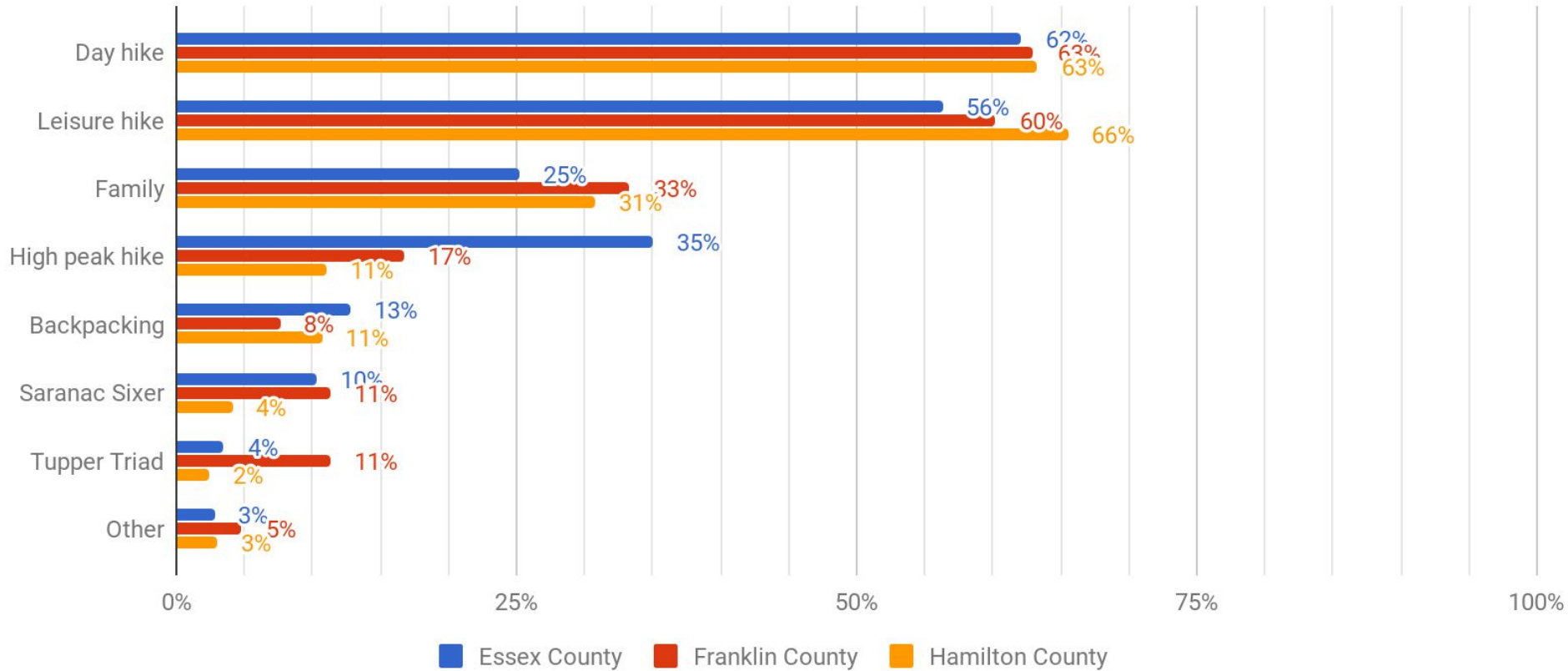
## Short term renters



\*Share of respondents that answered they traveled to the Adirondacks for outdoor activity

# Hiking breakdown\*

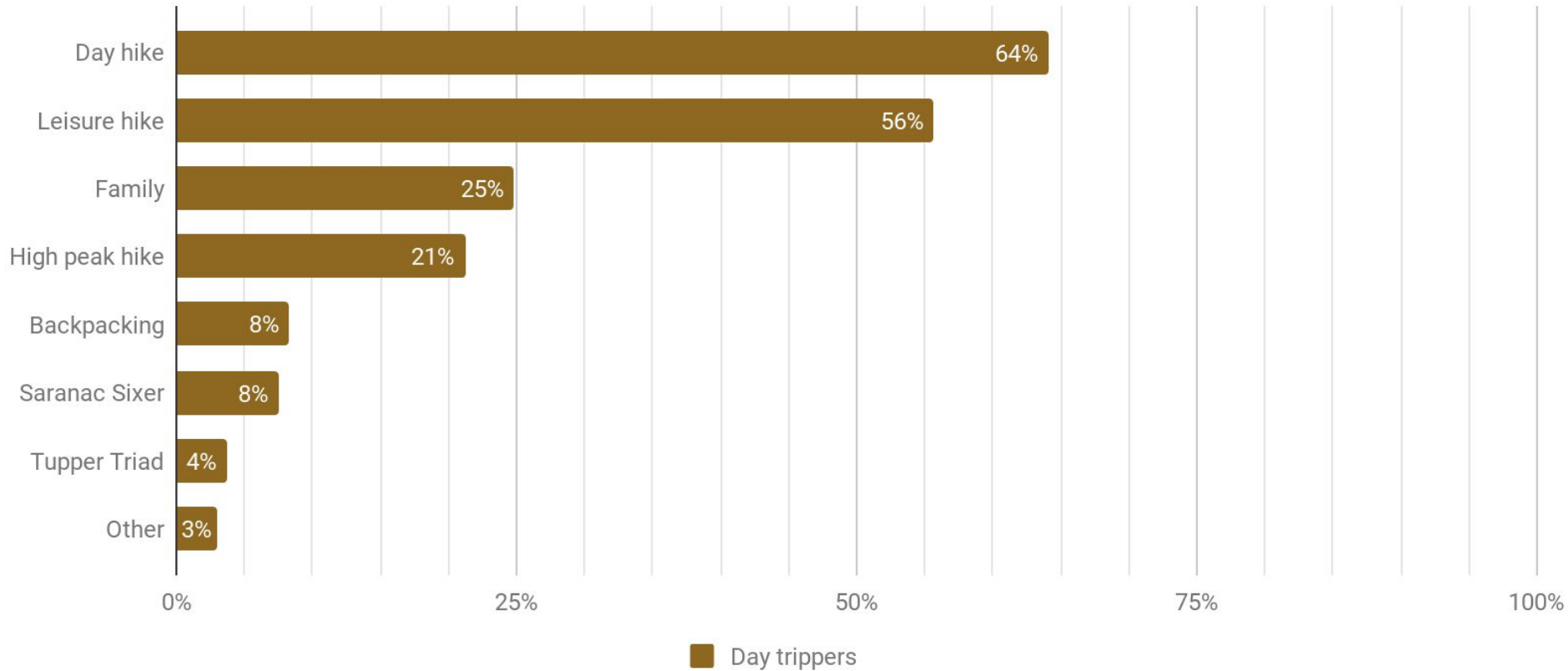
## All travelers



\*Share of respondents that answered they traveled to the Adirondacks for the outdoor activity of hiking

# Hiking breakdown\*

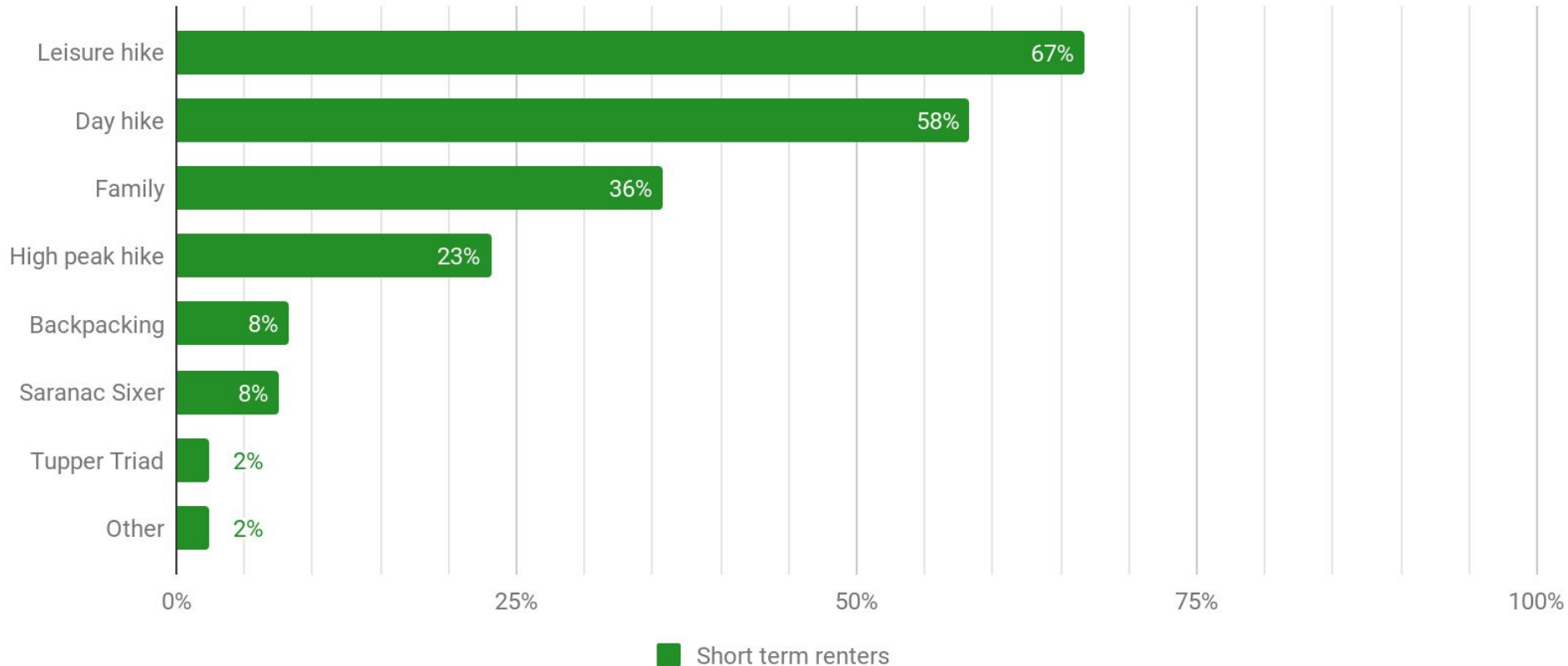
## Day trippers



\*Share of respondents that answered they traveled to the Adirondacks for the outdoor activity of hiking

# Hiking breakdown\*

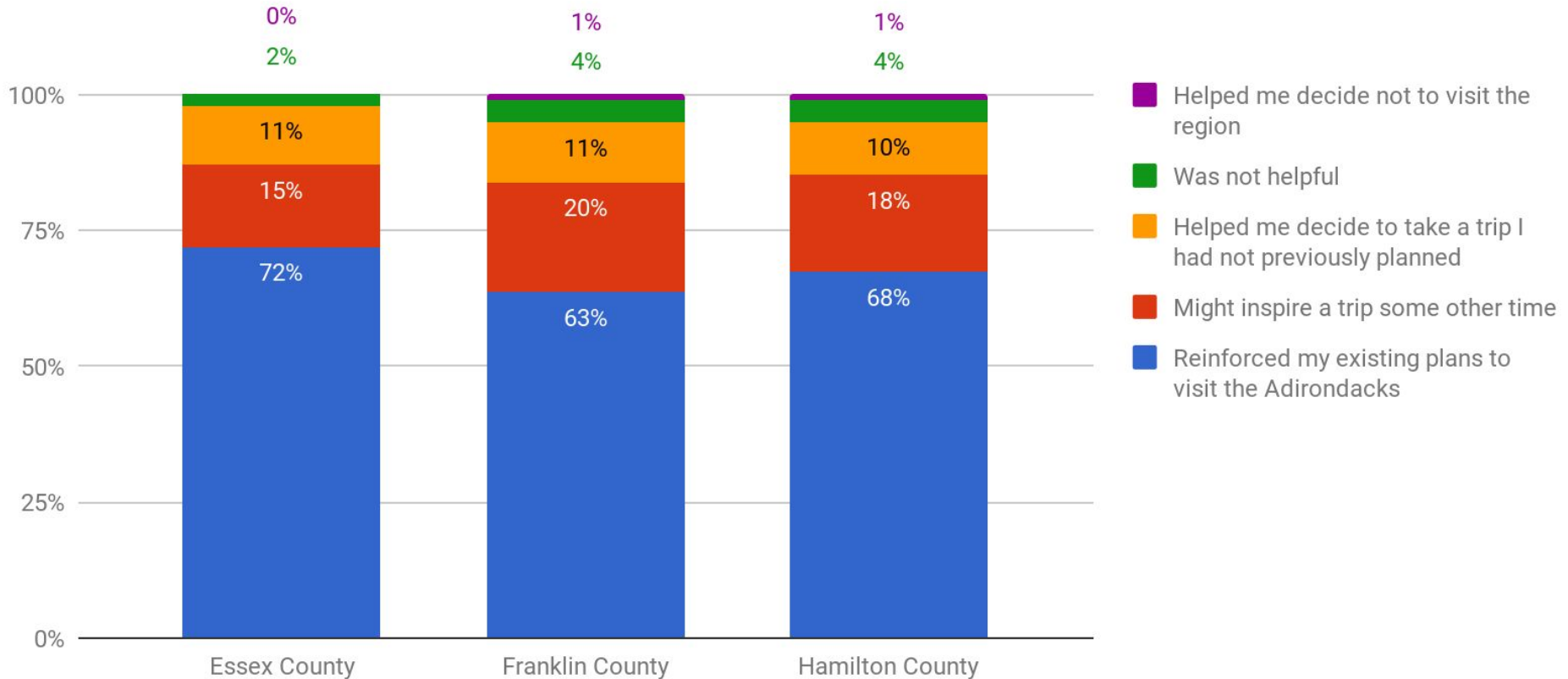
## Short term renters



\*Share of respondents that answered they traveled to the Adirondacks for the outdoor activity of hiking

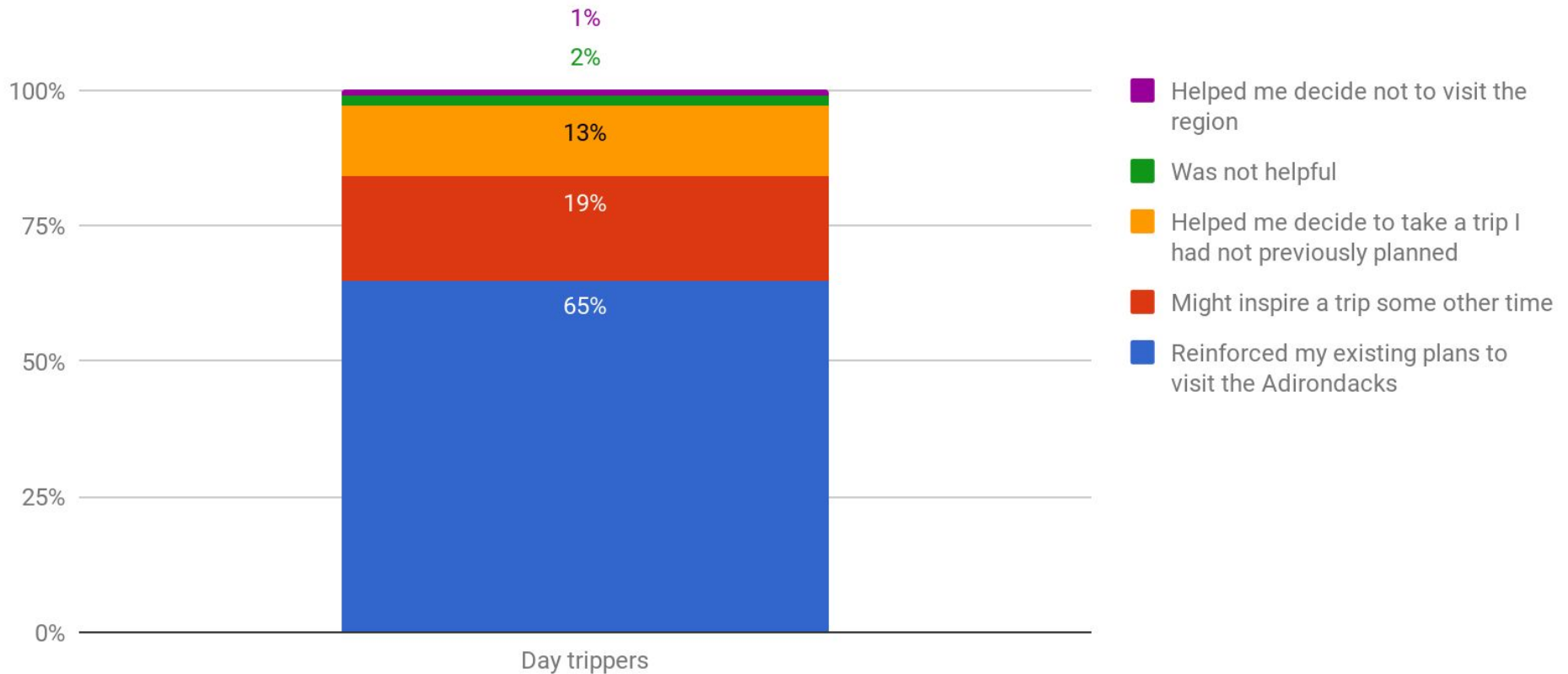
# Conversion rate from viewing ROOST marketing

## All travelers



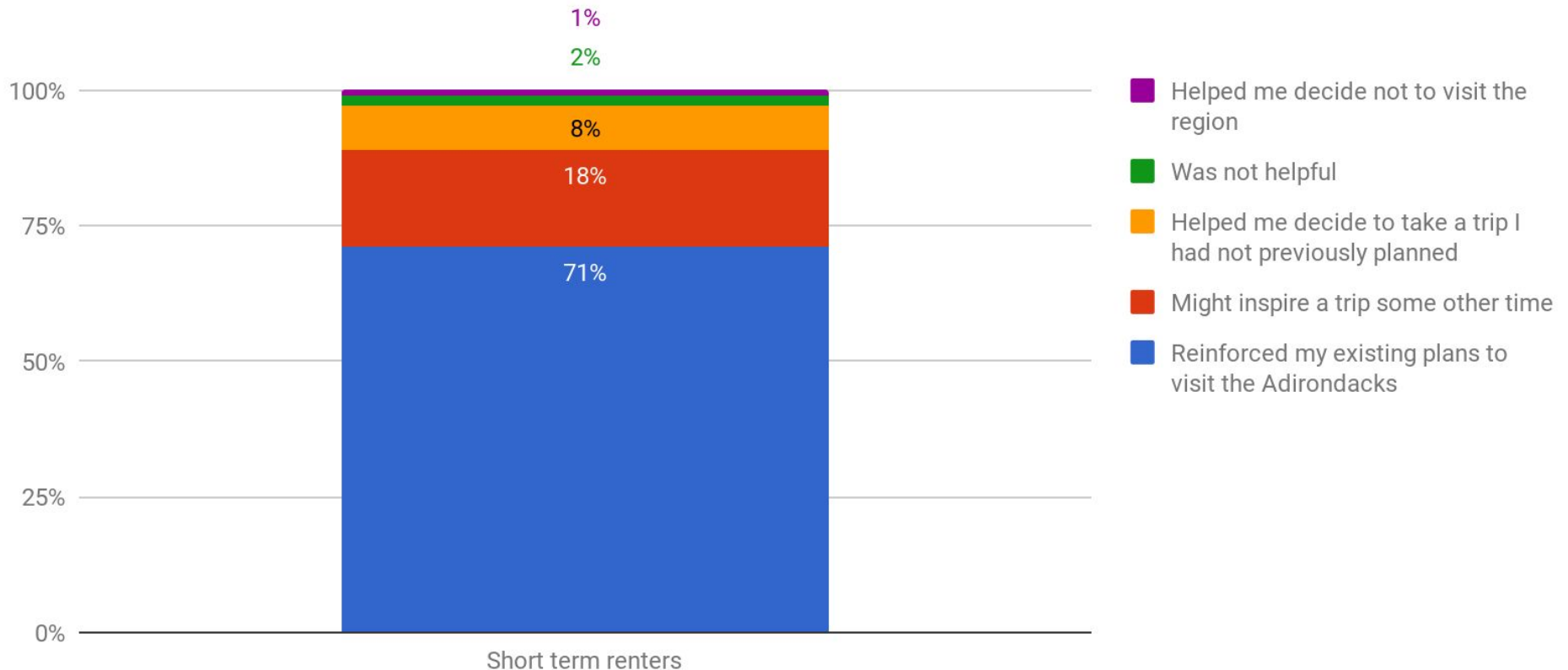
# Conversion rate from viewing ROOST marketing

## Day trippers



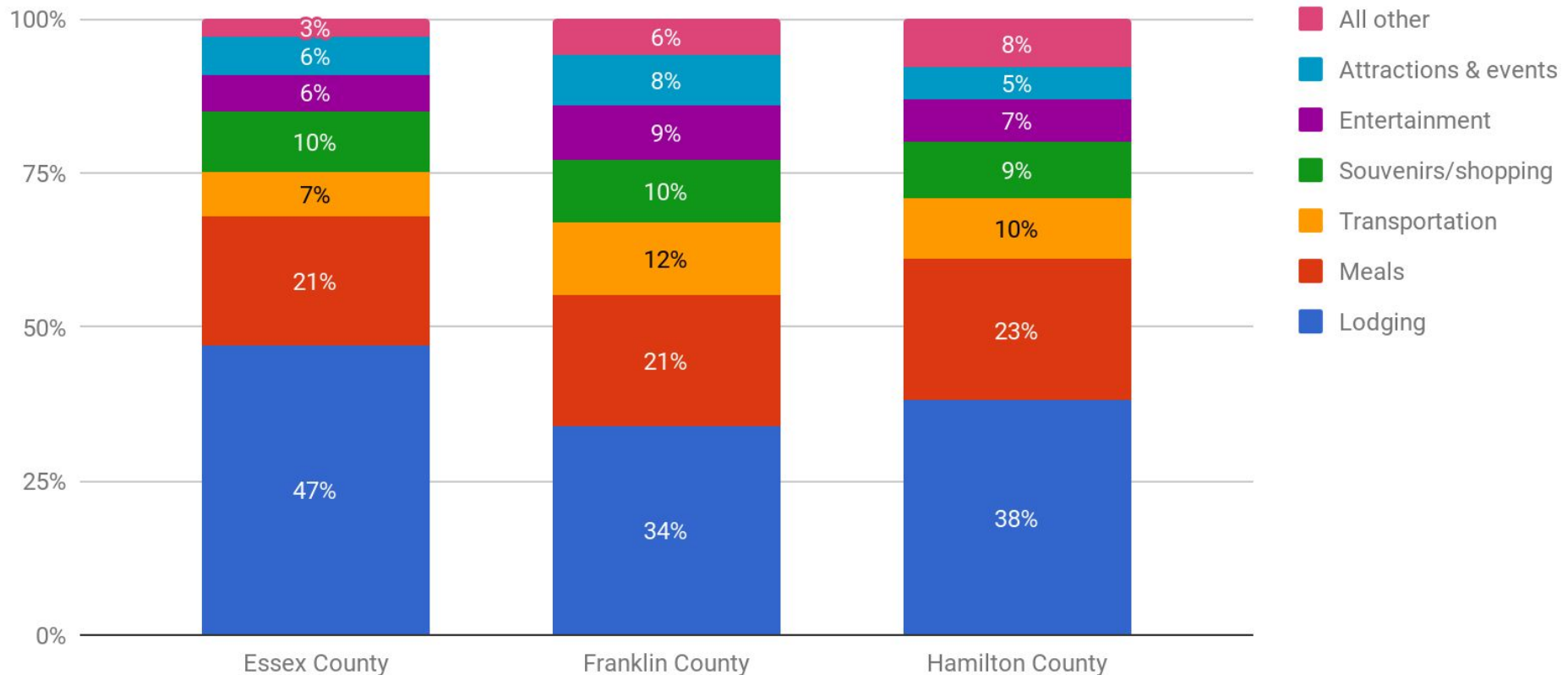
# Conversion rate from viewing ROOST marketing

## Short term renters



# Total expenditure allocation by category

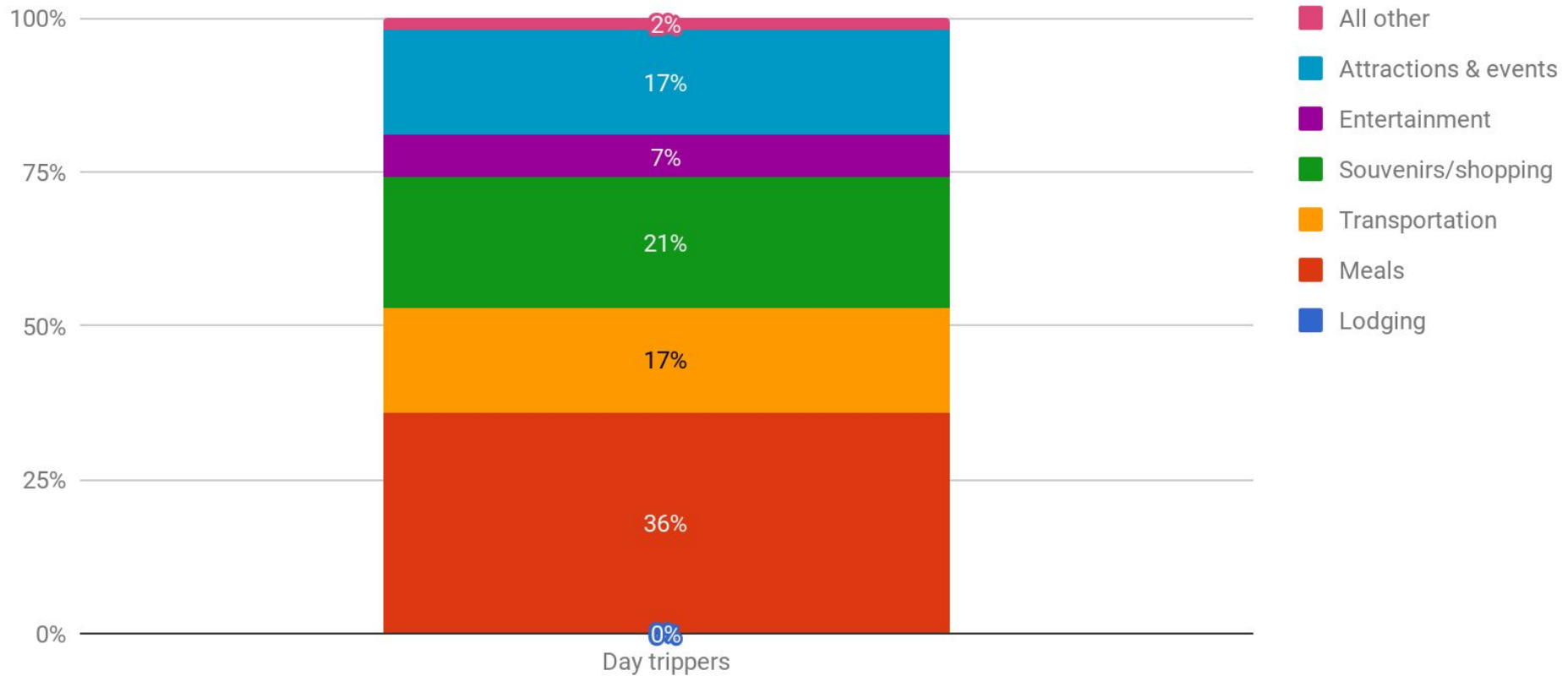
## All travelers





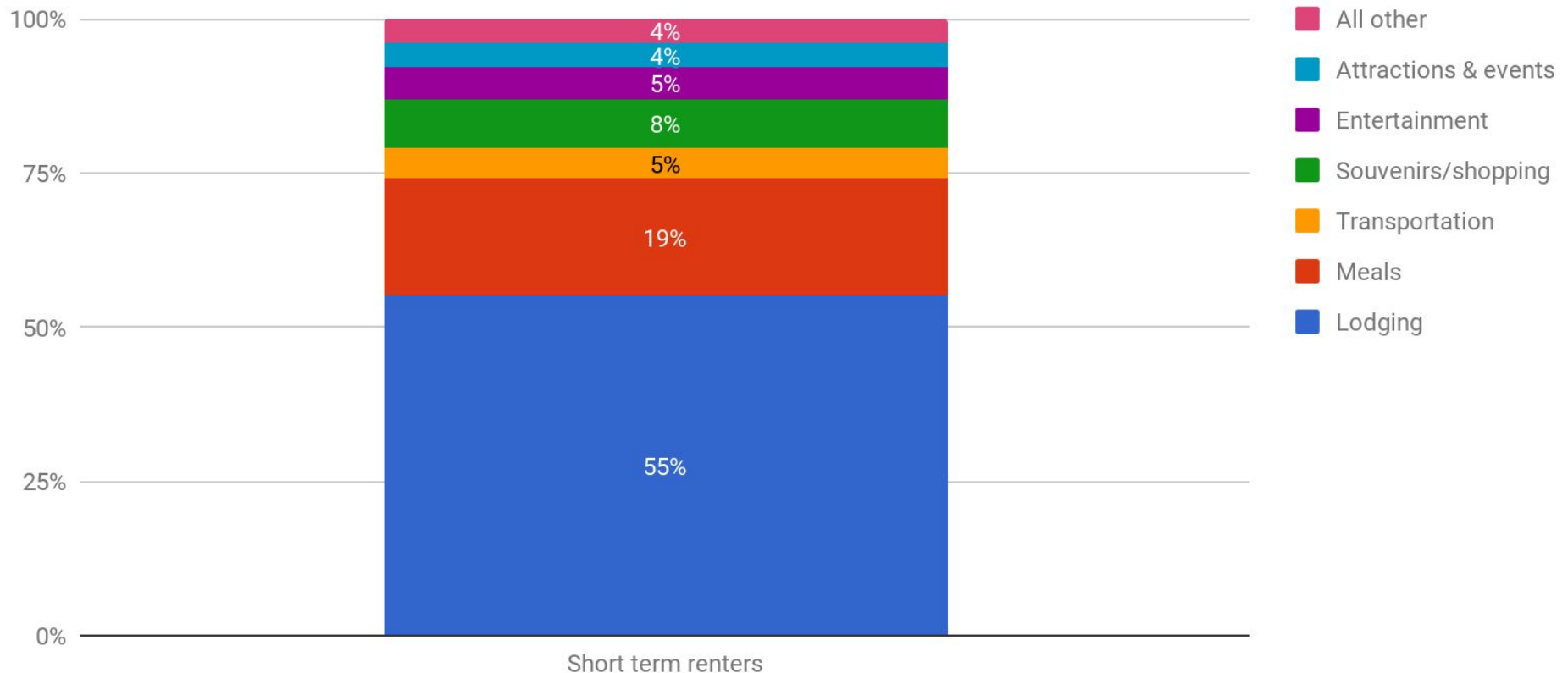
# Total expenditure allocation by category

## Day trippers



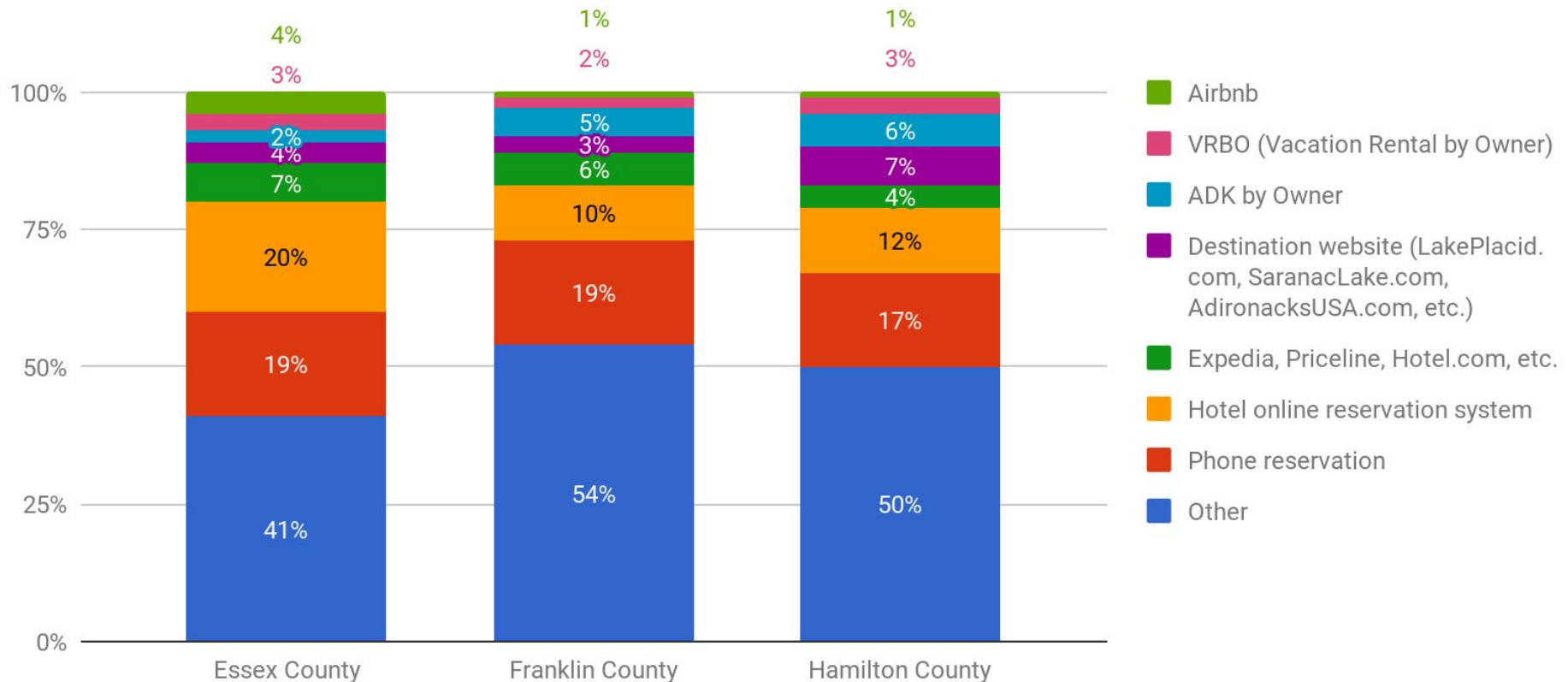
# Total expenditure allocation by category

## Short term renters



# Method of booking lodging reservation

## All overnight travelers



# Five year party expenditures\*

## All Essex County travelers

Category	Five year average	2017	2016	2014	2013	2012
Attractions & events	\$83	\$57	\$78	\$81	\$97	\$102
Entertainment	\$79	\$59	\$76	\$87	\$71	\$102
Transportation	\$132	\$69	\$92	\$130	\$189	\$181
Lodging	\$605	\$447	\$433	\$507	\$705	\$935
Meals	\$305	\$198	\$226	\$244	\$353	\$505
Souvenirs/shopping	\$167	\$95	\$146	\$152	\$170	\$270
All other	\$89	\$23	\$110	\$128	\$61	\$122
Average daily expenditure	\$368	\$340	\$387	\$338	\$323	\$452
Average total expenditure	\$1,460	\$948	\$1,161	\$1,329	\$1,646	\$2,217

\* 2015 Survey was not conducted

# Mean party expenditures

All travelers

	Essex County	Franklin County	Hamilton County
Lodging	\$447.00	\$308.00	\$323.00
Meals	\$198.00	\$191.00	\$197.00
Souvenirs/shopping	\$95.00	\$94.00	\$80.00
Transportation	\$69.00	\$117.00	\$81.00
Entertainment	\$59.00	\$84.00	\$63.00
Attractions & events	\$57.00	\$72.00	\$46.00
All other	\$23.00	\$56.00	\$65.00
Average daily expenditure	\$340.00	\$271.00	\$289.00
Average total expenditure	\$948.00	\$922.00	\$855.00

# Mean party expenditures

## Day trippers

	Day trippers	
Lodging	\$0.00	
Meals	\$82.00	
Souvenirs/shopping	\$55.00	
Transportation	\$38.00	
Entertainment	\$16.00	
Attractions & events	\$38.00	
All other	\$4.00	
Average daily expenditure	\$233.00	
Average total expenditure	\$233.00	

# Mean party expenditures

## Short term renters

	Short term renters
Lodging	\$1,118.00
Meals	\$383.00
Souvenirs/shopping	\$159.00
Transportation	\$109.00
Entertainment	\$108.00
Attractions & events	\$79.00
All other	\$83.00
Average daily expenditure	\$463.00
Average total expenditure	\$2,039.00

# Mean party expenditures

## By type of lodging

	Day trippers	Short term renters	Traditional lodging*	Campground	Second home/family/friends
Lodging	\$0.00	\$1,118.00	\$659.00	\$228.00	\$250.00
Meals	\$82.00	\$383.00	\$416.00	\$170.00	\$238.00
Souvenirs/shopping	\$55.00	\$159.00	\$433.00	\$84.00	\$92.00
Transportation	\$38.00	\$109.00	\$177.00	\$107.00	\$212.00
Entertainment	\$16.00	\$108.00	\$85.00	\$57.00	\$68.00
Attractions & events	\$38.00	\$79.00	\$80.00	\$50.00	\$57.00
All other	\$4.00	\$83.00	\$86.00	\$63.00	\$61.00
Average daily expenditure	\$233.00	\$463.00	\$705.00	\$202.00	\$210.00
Average total expenditure	\$233.00	\$2,039.00	\$1,937.00	\$757.00	\$977.00

	Average nights stayed
Day trippers	0
Short term renters	4.4
Traditional lodging*	2.7
Campground	3.8
Second home/family/friends	4.6

\*Traditional lodging includes: hotels, motels, resorts, and bed and breakfasts





# ESSEX COUNTY VISITOR PROFILE

# ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

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***adirondacks, usa***



# Visitor Profile

## All Essex County travelers

- Average visitor age 53 years old
- Average visitor party size 3.9 persons, with 2.9 adults and 1 child
- Visitation by NYS residents continued to increase, comprising 78% of 2017 visitors, with a decrease in reporting Canadian visitors
- Average visit length in 2017 was 2.8 nights, continuing a trend toward shorter reported stays
- 226,908 potential travelers contacted ROOST for information in 2017

# Visitor Profile

## All Essex County travelers

- Peak summer month and early fall visitation continues to dominate, however a growth in spring and early summer visitation (between March and June) was reported in 2017
- Hotels/motels, camping and staying with family and friends were the most common lodging choices
- Visitors (82%) most commonly reported outdoor activities as a draw to visit the area, followed by relaxing, dining and shopping (59%) and sightseeing (48%)

# Visitor Profile

## All Essex County travelers

- ❑ 87% of visitors who came to experience outdoor activities reported interest in hiking; day hikes, leisure hikes and family hikes were the most popular varieties
- ❑ Average daily reported spending by 2017 visitors was \$340, and total trip expenditures \$948. This is lower than 2016 reported levels, with most categories showing reported spending declines, but most notably within shopping and “other” spending categories
- ❑ Shorter visits, as well as potentially visitors coming from closer destinations and during the off-seasons, may be driving lower visitor expenditures



# FRANKLIN COUNTY VISITOR PROFILE

ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

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*adirondacks, usa*

# Visitor Profile

## All Franklin County travelers

- Average visitor age 54 years old
- Average visitor party size 4 persons, with 3 adults and 1 child
- NYS residents comprised 83% of 2017 visitors, with 11% coming from other northeastern states
- Average visit length in 2017 was 3.4 nights

# Visitor Profile

## All Franklin County travelers

- Peak summer month and early fall visitation dominate 2017 visitation at 63% of reported visits, however 25% of reported visits occur in spring and early summer visitation (between March and June)
- Camping, hotels/motels and staying with family and friends were the most common lodging choices
- Visitors (79%) most commonly reported outdoor activities as a draw to visit the area, followed by relaxing, dining and shopping (59%) and sightseeing (52%)



# Visitor Profile

## All Franklin County travelers

- ❑ More visitors reported in 2017 coming from farther destinations, including 15% from northeastern states other than NY and 6% from southern states
- ❑ Average daily reported spending by 2017 visitors was \$271, and total trip expenditures \$922. This showed a slight increase over measured 2016 levels, with all areas of reported spending growing except shopping and “other”
- ❑ A 5% decrease in day trip visitors and longer average stay was reported among the sample from 2017 in comparison to 2016, likely positively impacting expenditures





# HAMILTON COUNTY VISITOR PROFILE

ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

***adirondacks, usa***

# Visitor Profile

## All Hamilton County travelers

- Average visitor age 56 years old
- Average visitor party size 4.1 persons, with 3.2 adults and 0.9 child
- NYS residents comprised 83% of 2017 visitors, with 11% coming from other northeastern states
- Average visit length in 2017 was 3 nights

# Visitor Profile

## All Hamilton County travelers

- ❑ Peak summer month and early fall visitation dominate 2017 visitation at 64% of reported visits, however 27% of reported visits occur in spring and early summer visitation (between March and June)
- ❑ Camping, hotels/motels and private home rentals were the most common lodging choices
- ❑ Visitors (80%) most commonly reported outdoor activities as a draw to visit the area, followed by relaxing, dining and shopping (64%) and sightseeing (55%)

# Visitor Profile

## All Hamilton County travelers

- ❑ A notably high 88% of visitors who came to experience outdoor activities reported interest in hiking; leisure hikes, day hikes and family hikes were the most popular varieties.
- ❑ Average daily reported spending by 2017 visitors was \$289, and total trip expenditures \$855. This showed a decrease over measured 2016 levels, with all areas of reported spending declining except meals.
- ❑ Higher proportions of “off season” travelers, and a growth in those reporting staying with family and friends may have negatively impacted spending profiles.

# Regional ROI Study

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

ROOST

# Regional Visitor Impacts

- ❑ Strong occupancies, record high lead generation and overall higher off-season visitation were strong points noted among the survey of 2017 visitors.
- ❑ Challenges noted from 2017 included shorter visits and generally lower expenditure levels. A sub-study of private home renters indicated longer average stays, higher median income levels and substantially higher expenditures. This notes an area of positive trending that bears further study.
- ❑ Average daily visitor spending in 2017 was estimated at \$326 per day or a total of \$977 per trip.

# Regional Visitor Impacts

- 79% of respondents were positively influenced by ROOST marketing materials in their decision to travel to the region
- An estimated 968,000 visitors were positively influenced by ROOST in visiting the region in 2017, using this average 79% conversion, an average party size of 3.4 persons and over 311,000 direct traceable inquiries



# Return on Investment (ROI)

- Using the number of traceable leads, the average conversion rate, the average party size and length of visitor stay, the **total estimated revenue generated by regional visitors influenced by ROOST in 2017 is over \$240 million**
- The ratio for this estimated visitor spending, considering ROOST marketing expenditures in 2017, yields a **Return on Investment of 62:1**
- For every dollar that ROOST spent marketing the region in 2017, an estimated \$62 in visitor expenditures was generated



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

2017 COUNTY VISITOR  
PROFILES & REGIONAL  
RETURN ON MARKETING  
INVESTMENT ANALYSIS

July 2018

**2017 REGIONAL LEISURE TRAVELER DATA  
AND MARKETING-RETURN ON INVESTMENT  
ANALYSIS:**

***ESSEX, FRANKLIN AND HAMILTON  
COUNTIES, ADIRONDACKS NY***

REGIONAL OFFICE of SUSTAINABLE TOURISM



Prepared by: PlaceMaking  
*Growing North Country Communities and Economies*  
April 2018

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## BACKGROUND

The Regional Office of Sustainable Tourism (ROOST) is responsible for marketing tourism assets for the Essex, Franklin and Hamilton County region of New York State. The agency commissioned a study to determine leisure traveler information at the county levels and to gauge key regional marketing program statistics. ROOST contracted with PlaceMaking, a regional community and economic development research firm, to complete this research. Regional traveler data and a summary marketing/return on investment (ROI) analysis are provided in this briefing.

This research measures the leisure travel market and does not intend to reflect impacts produced by the meeting/convention market segments. This summary depicts the regional impacts of leisure marketing expenditures and estimated return on these investments.

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## METHODOLOGY

In early 2018, using a jointly-created survey tool with the consultant, ROOST sent an invitation to a representative sample of its travelers to Essex, Franklin and Hamilton Counties. The end-product of the research includes detailed traveler information and estimated traveler expenditures and associated analysis.

The number of potential travelers who inquired about travel to the region in 2017 and provided contact information (traceable leads) was 311,171. Traceable leads do not include the potentially much larger audience that could also be influenced by promotional material for the region suggesting that the traceable leads represent a conservative number to base both the return on marketing dollars and ROI calculations.

A sampling of these travelers was requested via social media and e-mail to complete an online survey. A total 4.1% response rate was received, lower than the targeted figure. PlaceMaking has conducted this research for Essex County tourism assets for numerous years and one other year yielded a similar low response rate. While caution with results was similarly provided that year, with the researchers recommending a several-year trending review in subsequent years, that later validated this smaller pool. Given this experience and the overall similar demographic and traveler trends, the researchers feel confident in regional traveler data and marketing/ROI analysis at the regional level.

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## SUMMARY TRAVELER DATA

Highlights of 2017 visitation to the region included:

### **Demographics and Visit Information**

- Average traveler party age of respondents was 53 years old and the mean annual reported household income of travelers was \$93,511.
- The average reported total traveler party size was 3.94 persons, including an average of 3 adults and 0.94 child. The average stay reported by 2017 travelers was 3 nights.
- Peak summer months (July/August at 36%) and early fall (September/October at 21%) dominate with more than half of reported annual visits. May/June is a strong season for visitation regionally, with 20% of reported visits. March-April adds 7% of travelers during the spring season. Winter season is the lowest activity period regionally with 17% of visits reported between November and February.
- Hotels/motels are the most popular lodging choice among 2017 traveler respondents (43%), followed by camping options (19%) and staying with family and friends (15%). Twelve percent of respondents stayed in private rented homes and ten percent stayed in second homes.

### **Interests**

- Outdoor activities were the largest draw to the area with 81% of respondents selecting this area. Relaxing, dining and shopping was the second most frequently reported draw to visit the region (62%), followed by sightseeing (52%). Visiting friends (34%), events (24%) and Olympic sites (23%) were the next most commonly selected attractions.
- Hiking remained the most popular reported outdoor activity among all survey respondents, with 81% of respondents who reported seeking outdoor activities indicating interest in this activity. The following outdoor activity interests were also selected as most popular activities of interest given by at least 20% or more of respondents (in descending order): canoeing/kayaking, sightseeing, fishing, boating, and skiing/riding.

- A more detailed question regarding hiking preferences was added to this year's survey. More than half of hikers expressed interest in leisure hikes and day hikes. Family hikes were of interest to nearly half of hikers and 46er hikes were of interest to nearly a third of hiking respondents.

### **Traveler Spending and Conversion**

- The average daily traveler party spending in 2017 is estimated at \$326 per day, or a total of \$977 per trip.
- Conversion measurement, the percent of travelers who stated that the information or marketing viewed either reinforced potential plans to visit or helped them decide to take an unplanned trip, was 79%.
- More than 300,000 (311,171) potential travelers inquired about visiting the region in 2017 through ROOST's various outlets and left contact information which provided unique identity. It excludes those who received information and did not leave contact information.

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### **ESTIMATED TRAVELERS**

The 2017 estimated traveler count is tabulated by multiplying the number of *traceable* leads generated by ROOST (those who contacted their office during 2017 for information through all sources) by the conversion factor and by the average party size (determined by the survey).

*311,171 (direct leads) X 79% (gross conversion factor) x 3.94 (average party size)*

*Estimated travelers in 2017 = 968,550*

The number of travelers who were influenced by ROOST in visiting the region in 2017 is estimated at over 968,000. Again, it is the opinion of the researchers that the traceable leads are a conservative number on which to predicate these calculations.

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## RETURN ON INVESTMENT

Return on investment (ROI) is measured by estimated expenditures generated by travelers and divided by the total marketing dollars spent by ROOST.

The first step in this process is to estimate total revenue generated by leisure travelers to the region, who were influenced by ROOST marketing materials, by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures and length of stay:

$$311,171 \text{ (number of direct, traceable inquiries)} \times 79\% \text{ (gross conversion factor)} \\ \times \$326 \text{ (mean traveler party expenditure per day)} \times 3 \text{ (mean length of stay in nights)}$$

$$= \$240,416,938 \text{ (total estimated revenue generated by travelers influenced by ROOST in 2017)}$$

The second step in this process is to divide the total revenue generated by travelers by the marketing dollars spent, in the first case, by the total ROOST marketing budget:

$$\$240,416,938 \text{ (total estimated traveler revenue)} / \$3,889,219 \text{ (total ROOST marketing expenditures)}$$

$$\text{Return on Investment (ROI)} = 62:1$$

The above calculations show that the total estimated revenue generated by travelers touched by ROOST was over \$240 million in 2017. This produces a conservatively-estimated ROI of \$62 in leisure traveler-related revenue for every marketing dollar expenditure.

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## CONCLUSIONS

The above analysis, including estimated marketing costs per traveler and ROI of marketing dollars invested on behalf of Essex, Franklin and Hamilton Counties, indicates success in efficiently reaching travelers to the region. The expenditures generated by the travelers impacted by ROOST marketing efforts far exceed the marketing inputs and demonstrate the success of tourism marketing across the region.

Estimated regional visitation in 2017 was 968,550 and estimated expenditures by these travelers is over \$240 million. Based on ROOST's 2017 marketing budget, this

results in an estimated return on investment of \$62 for every marketing dollar expended.

Some of the challenges noted across the region from 2017 visitation included lower expenditures and shorter stays. This appears to be a trend in other areas and also a result of travelers traveling, on average, from nearer destinations or for specific events that may afford less free time. Travel in the off-season has also grown. All of these characteristics may negatively impact spending models.

A number of positive attributes, such as strong occupancies across the region, strong lead generation (particularly high in 2017) and high overall visitation throughout the year remain. These data bear further study and analysis in subsequent years to determine and measure trending and for further consideration of regional visitation impacts and marketing strategies to adjust.

The conservative methodology employed, particularly at this regional level, provides confidence in the results. The study at a regional level provides a benchmark in measuring ROI on marketing investments for the three-county region. It may also be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for 2018 travelers and beyond.

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## SUMMARY TABLE OF KEY REGIONAL ROI DATA

	<b>2017</b>
Number of Completed Survey Respondents	5,345
Direct, Traceable Inquiries to the Bureau	311,171
Average Night Stays/ Party	3.0 Nights
Average Party Size	3 adults, 0.94 child 3.94 Persons
Conversion Factor Rate	79%
Average Daily Expenditure per Party	\$326
Total Leisure Traveler Expenditures	\$240,416,938
ROOST Total Marketing Budget	\$3,889,219
Marketing Budget ROI	62:1