



# Leisure Travel Study

## Essex, Franklin, and Hamilton County Region

2018 Essex County Visitor Focus

May 2019

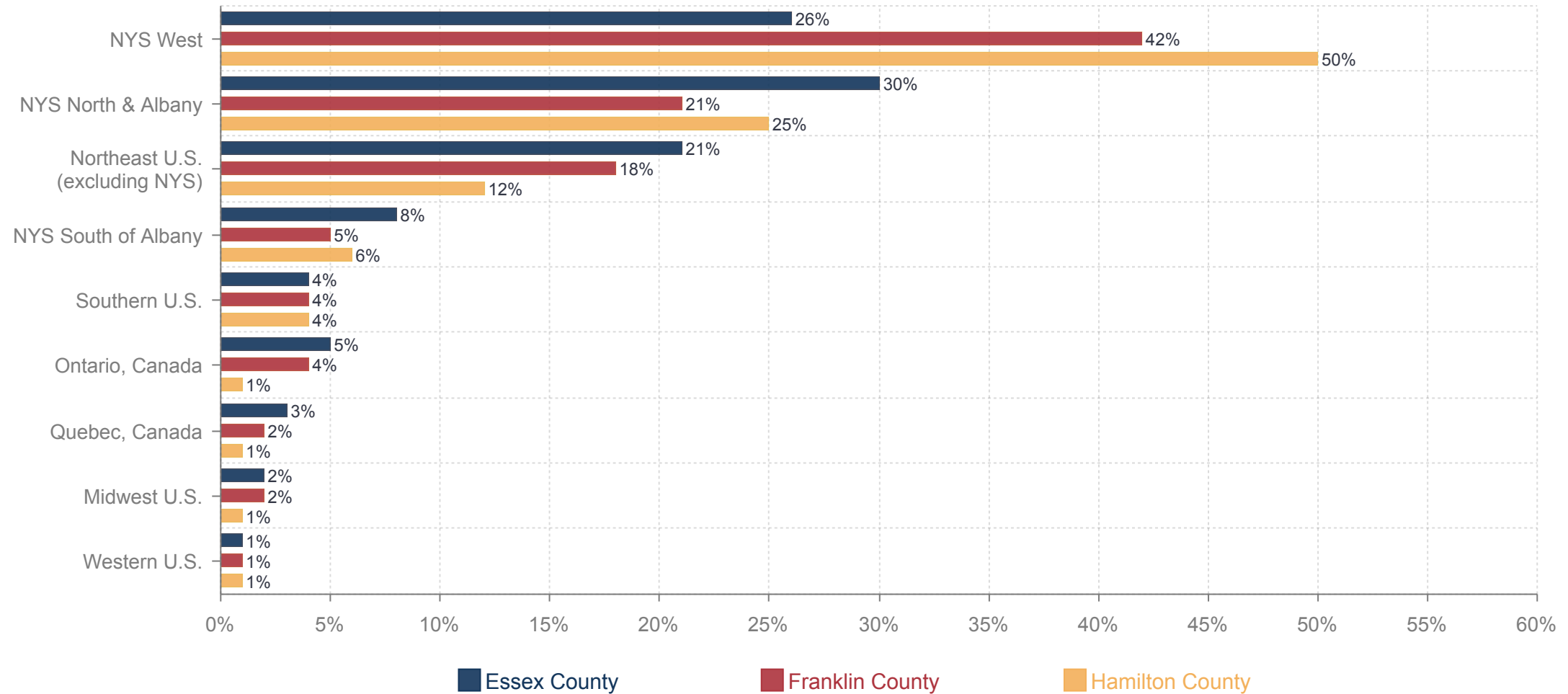
ROOST

# Project Background & Methodolgy

- Research based on results of survey sent January 2019 to a representative sample of 2018 regional visitors
- 313,673 potential travelers inquired about travel to the region in 2018 and provided contact information (traceable leads)
- 63,701 electronic invitations to participate in the survey were sent by ROOST; 3,337 completed surveys received from respondents who traveled to Essex/Franklin/Hamilton County region of Adirondacks in 2018
- Survey response rate of 5.2%, slightly lower than the goal (6-8%); researchers confident with data due to longitudinal comparisons
- Survey results also considered at the county levels for visitor characteristics, divided by the location in which travelers spent the most time
- Data was also cross-tabulated to review sub-groups of day trip travelers and those who stayed in short-term rentals

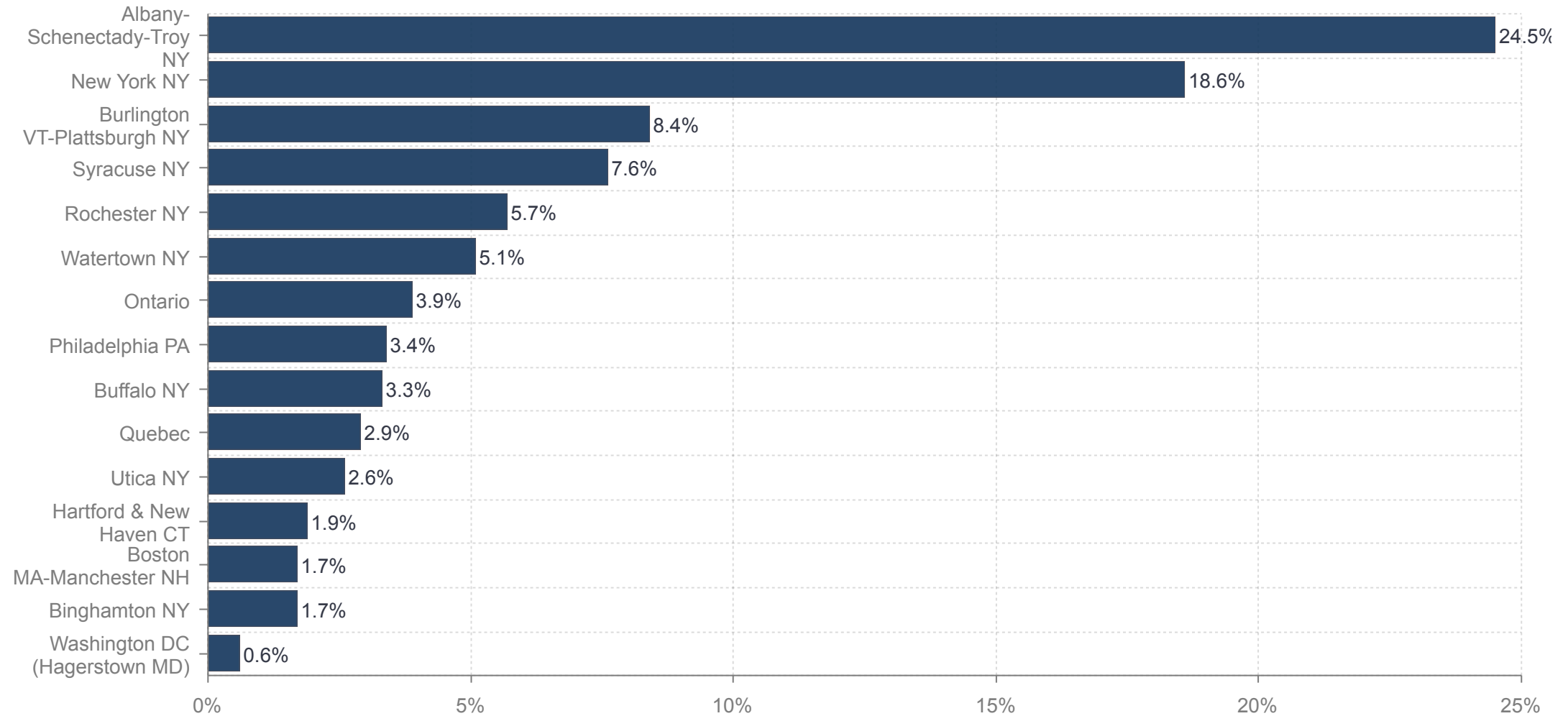
# Area of Residence

All travelers



# Area of Residence by DMA

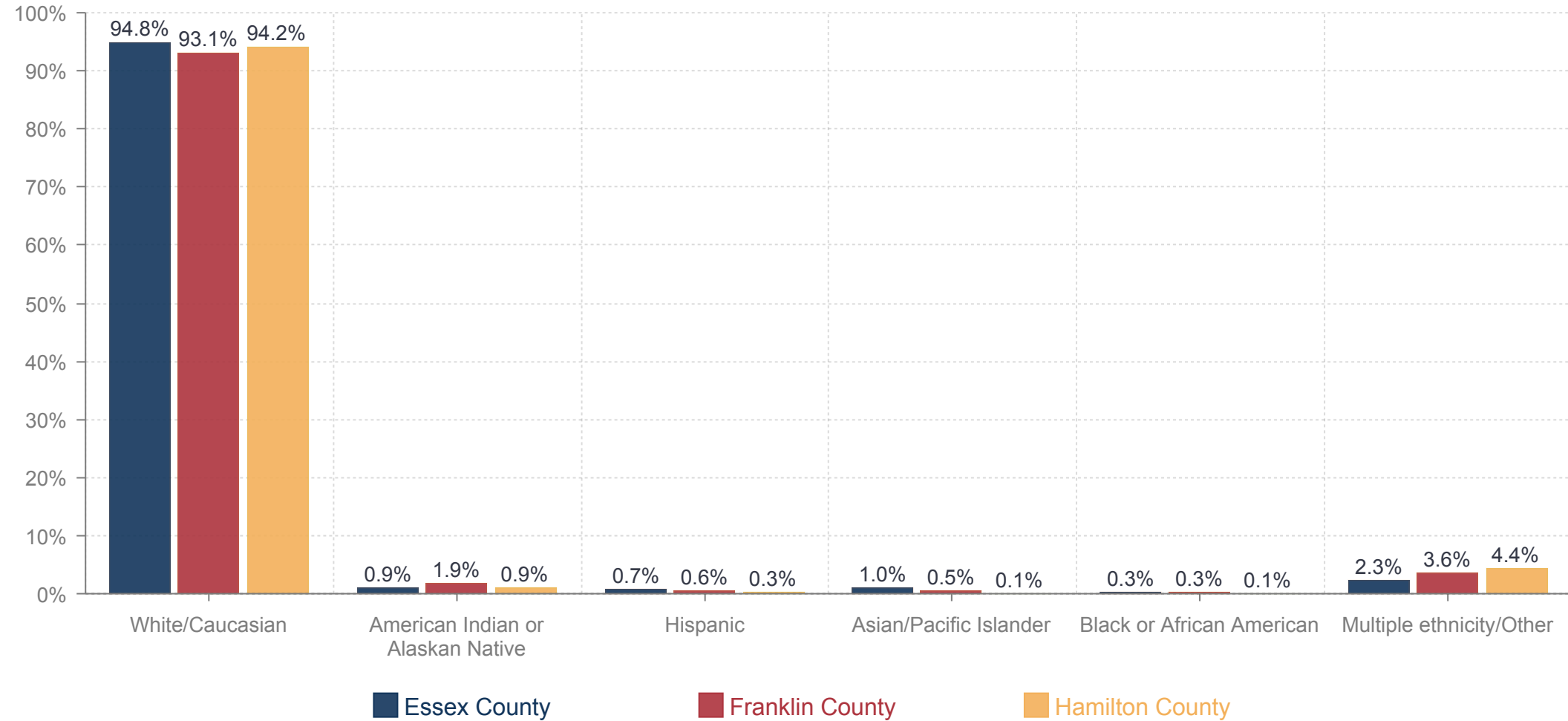
## Essex County travelers





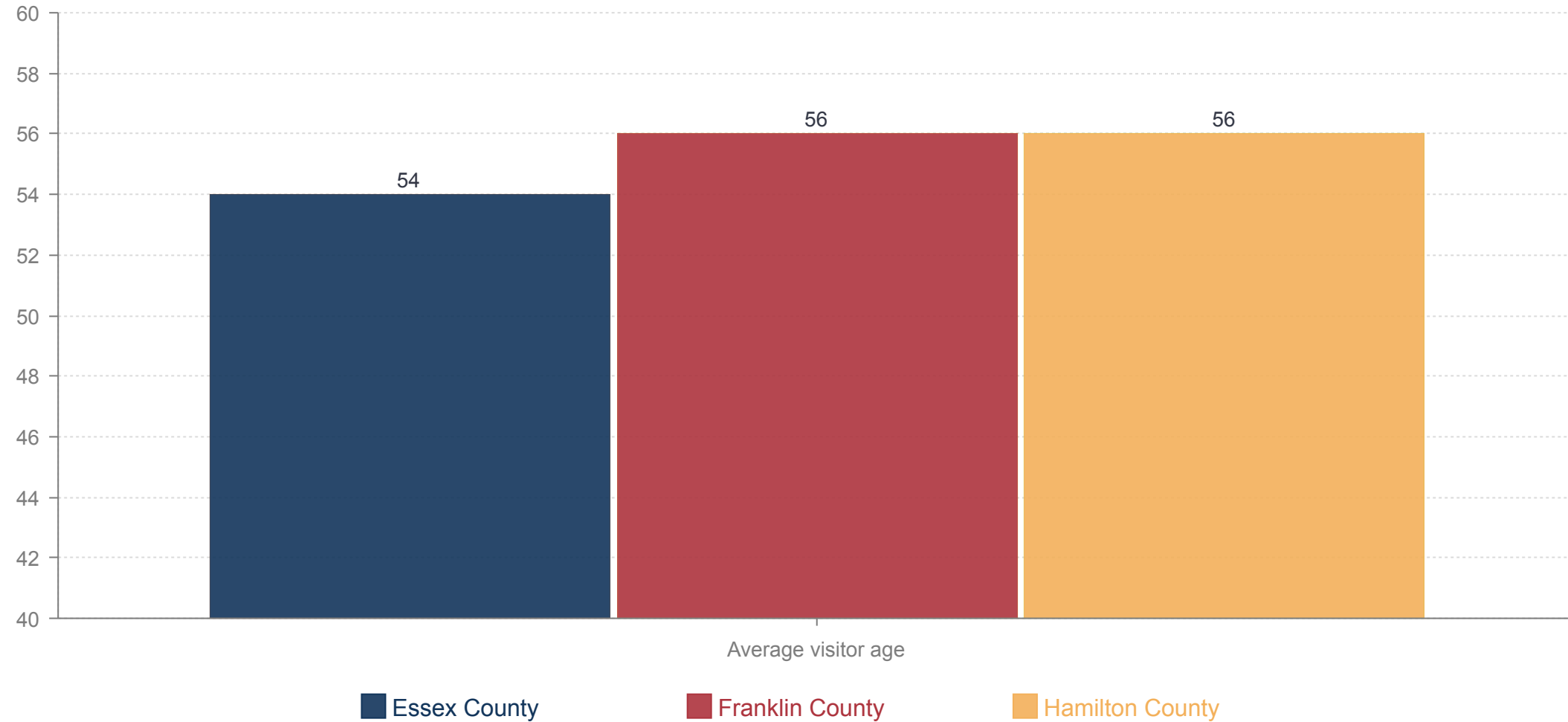
# Ethnicity

All travelers



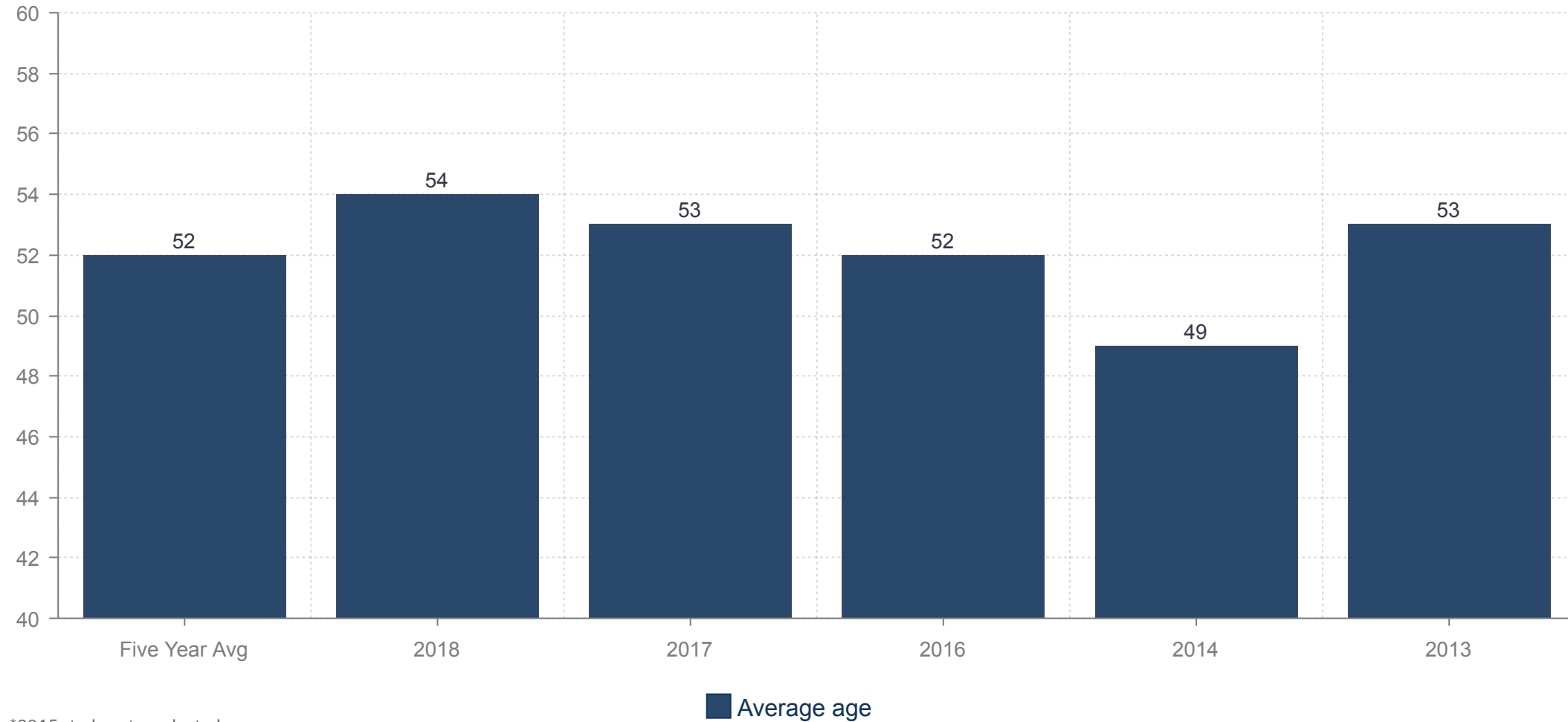
# Average Age

All travelers



# Five Year Average Age\*

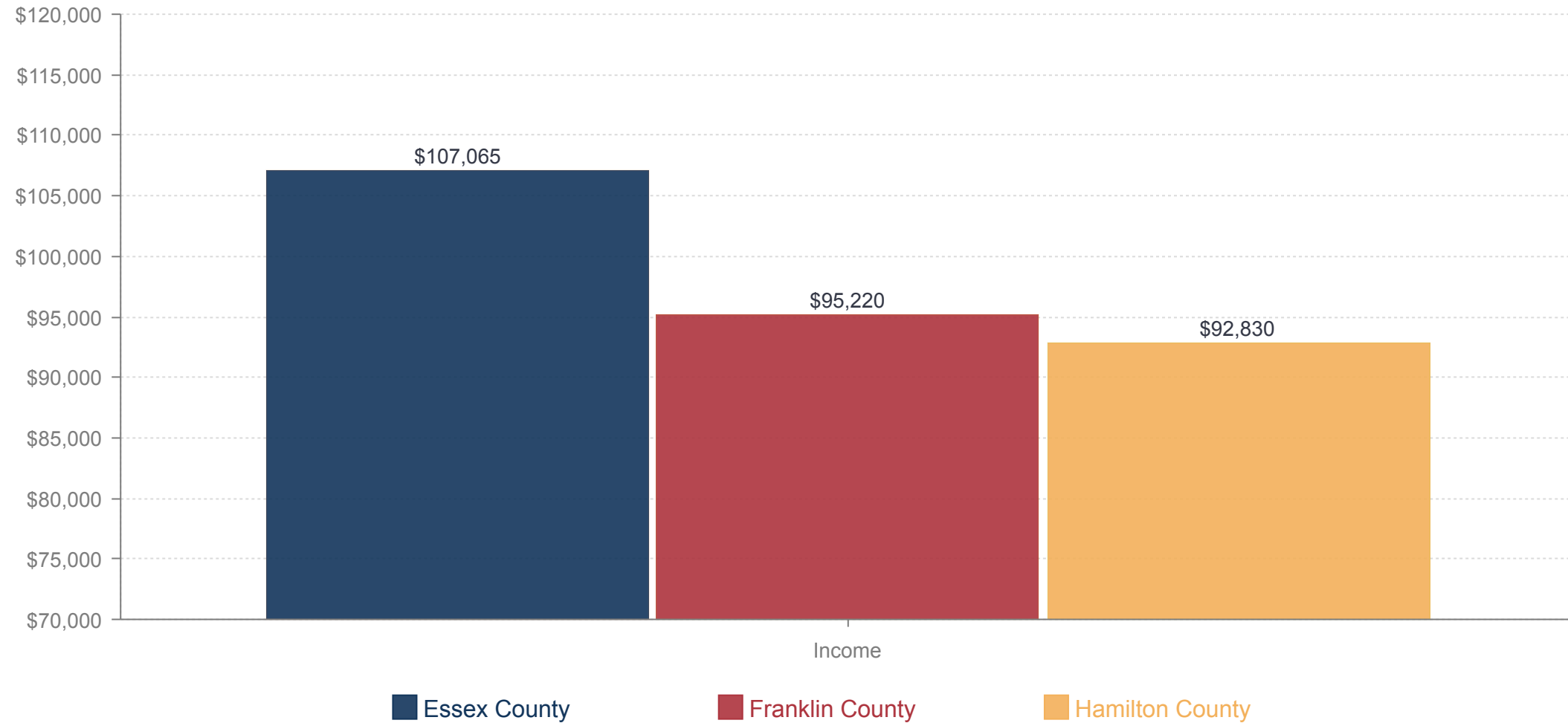
Essex County travelers



\*2015 study not conducted

# Average Income

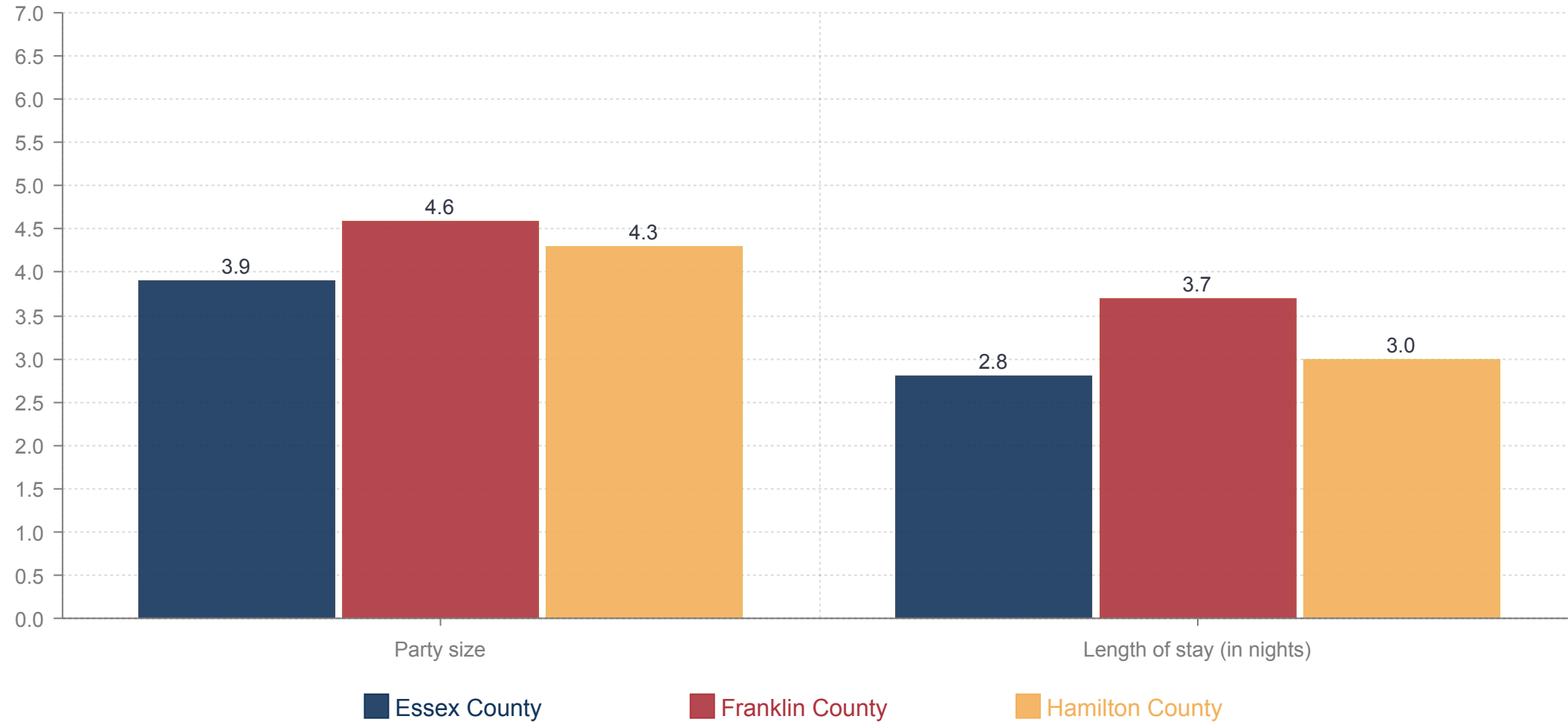
All travelers





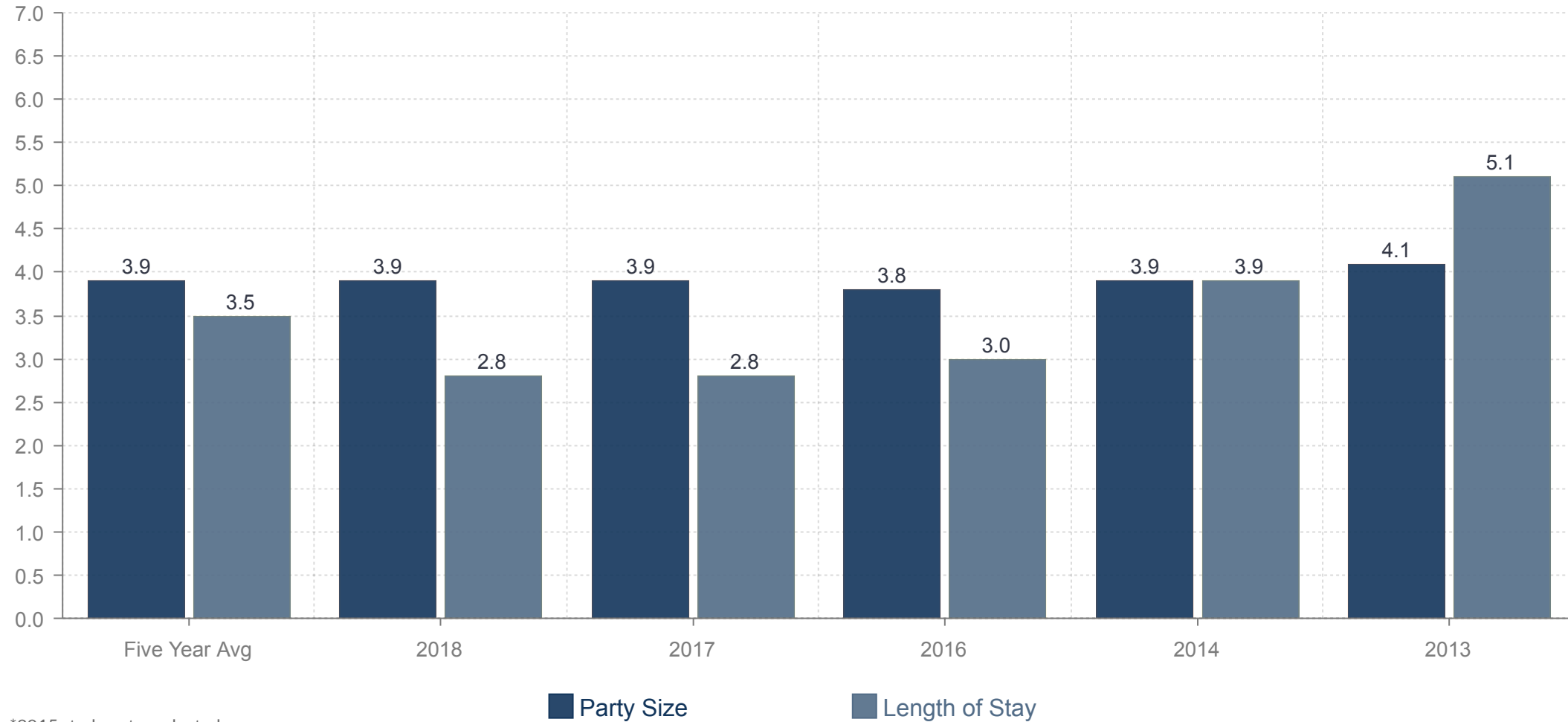
# Party Size/Length of Stay

All travelers



# Five Year Average Party Size / Length of Stay\*

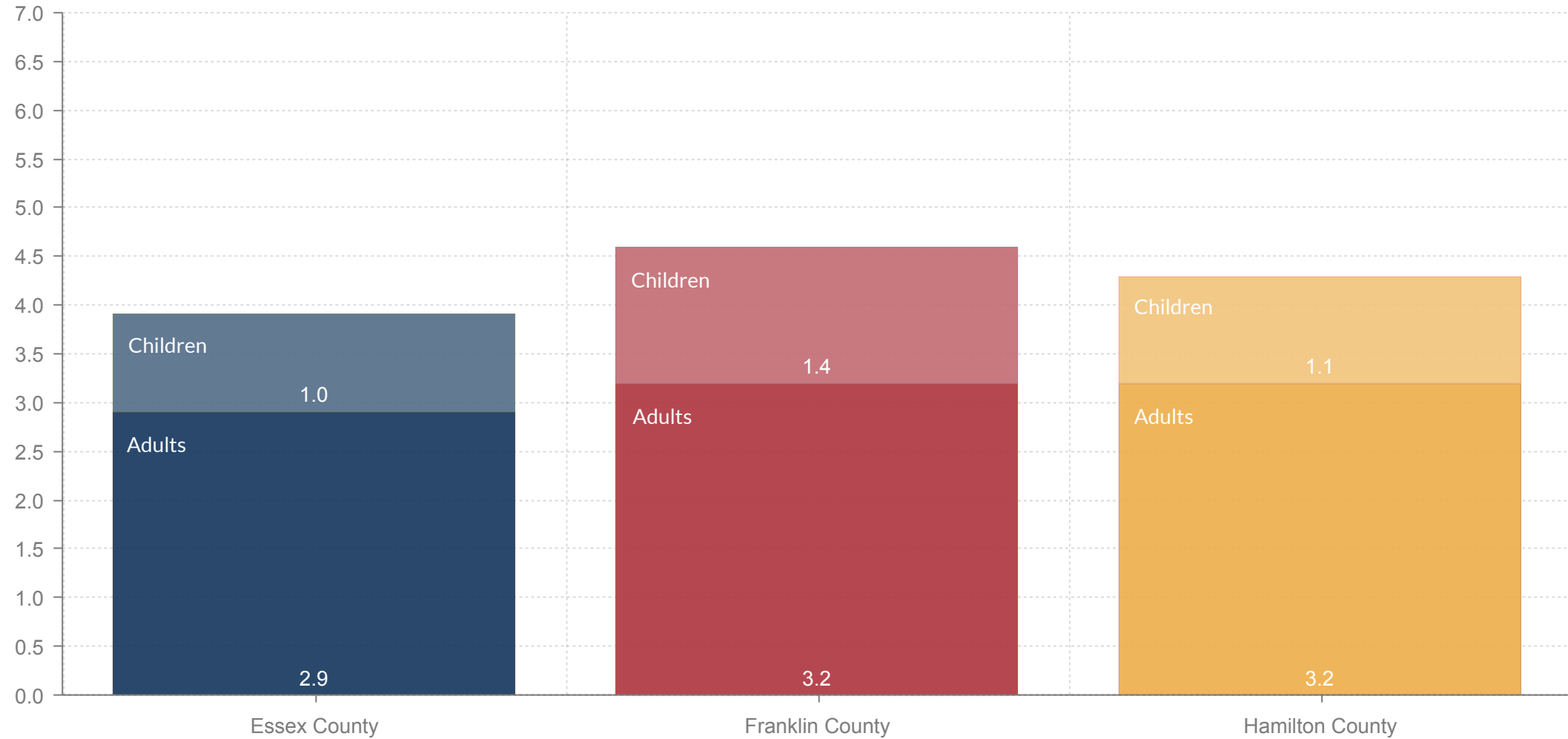
Essex County travelers



\*2015 study not conducted

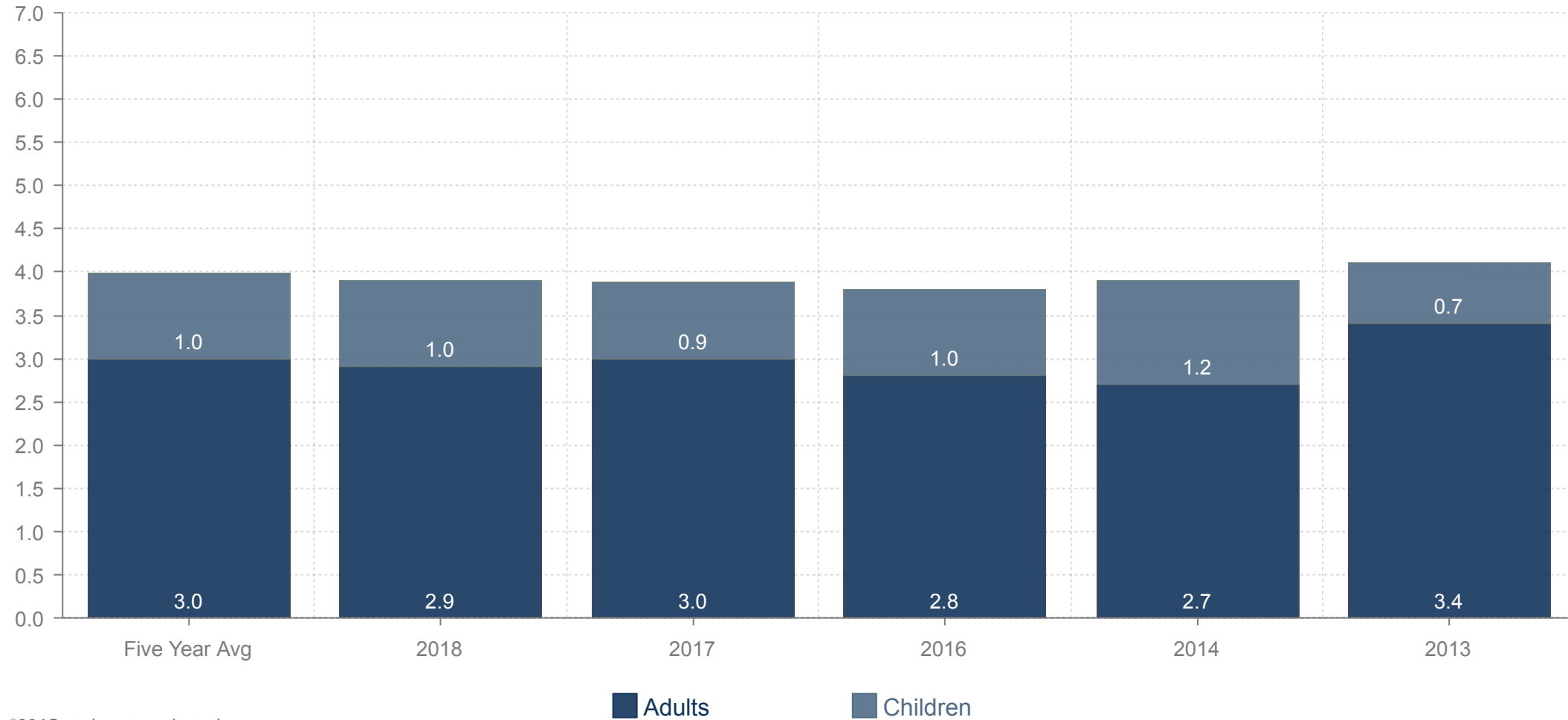
# Party Composition

All travelers



# Five Year Average Party Composition

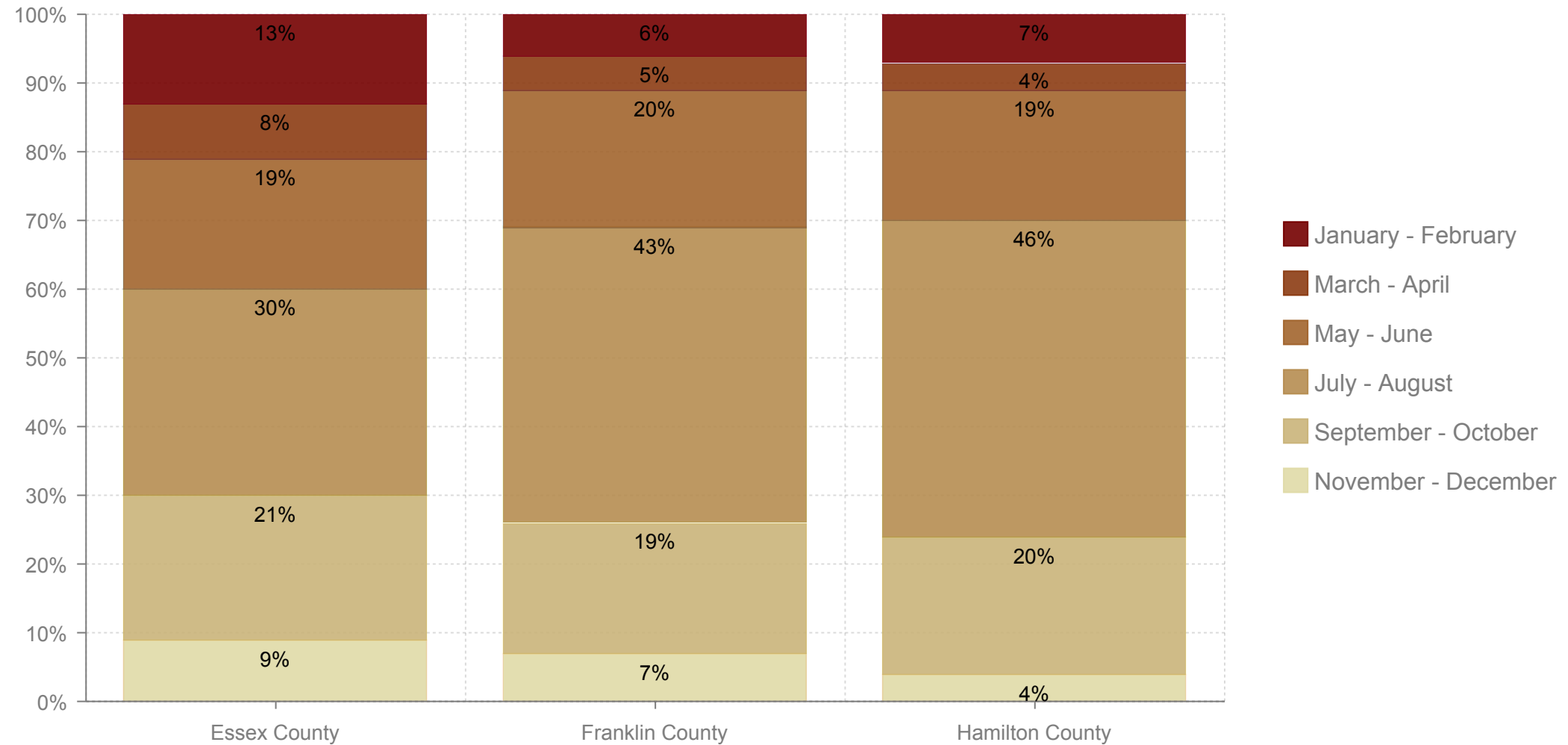
Essex County travelers



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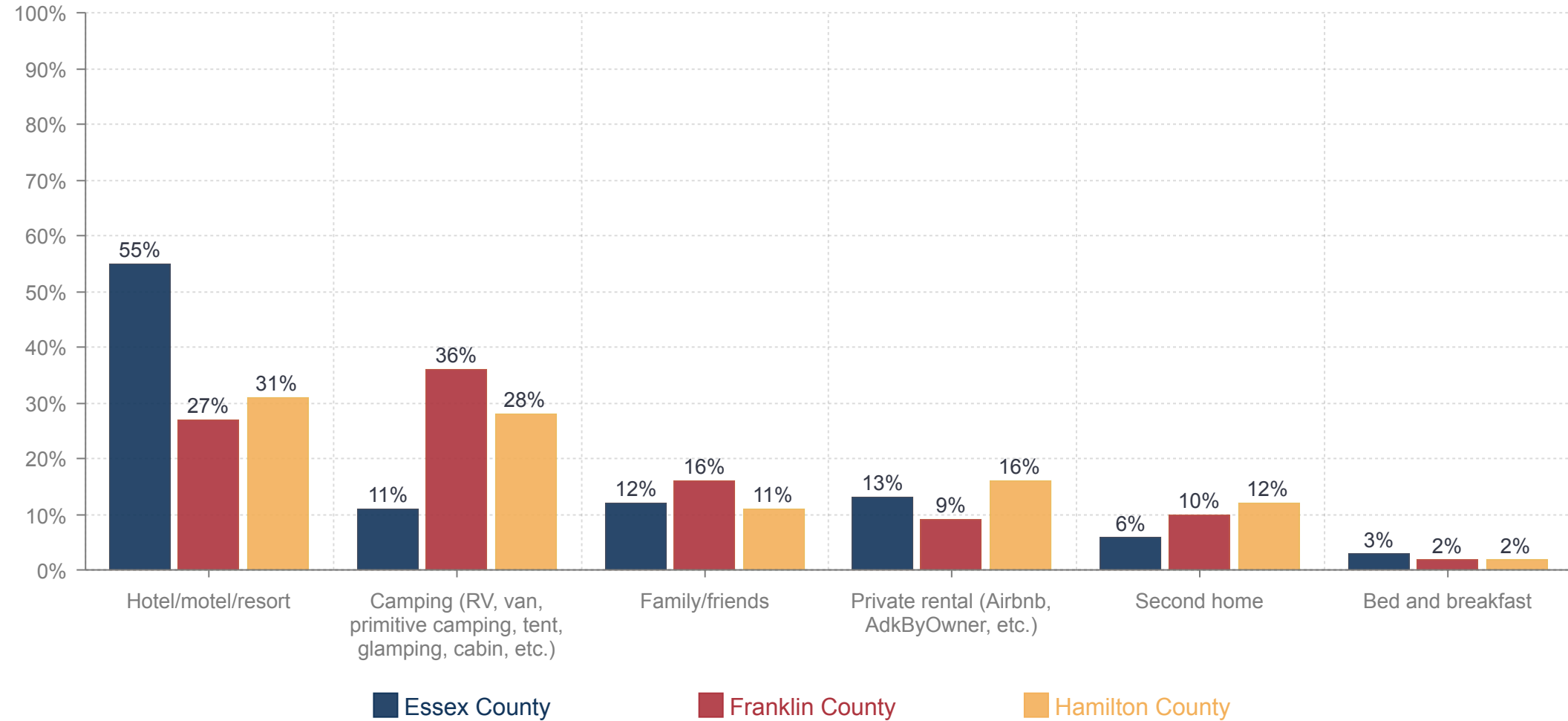
# Time of Year Visited

All travelers



# Lodging Accommodations

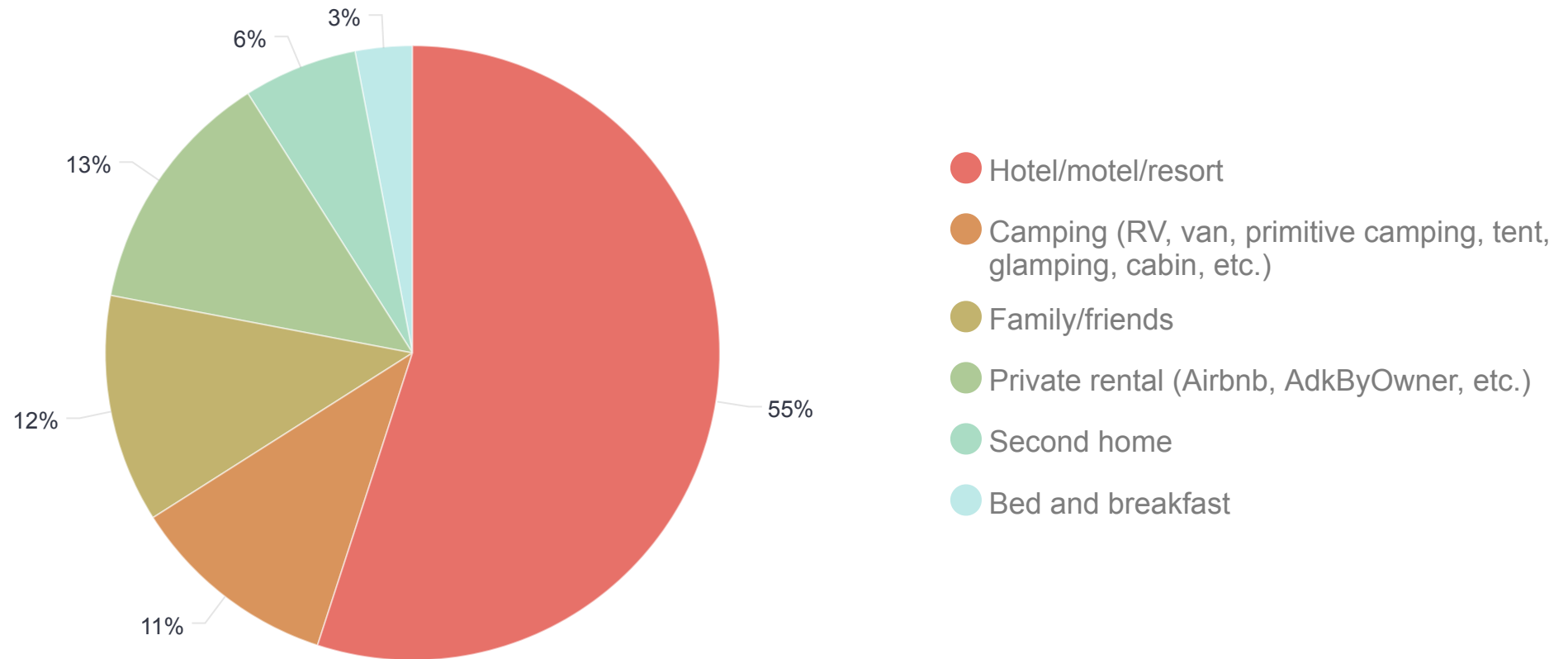
All travelers





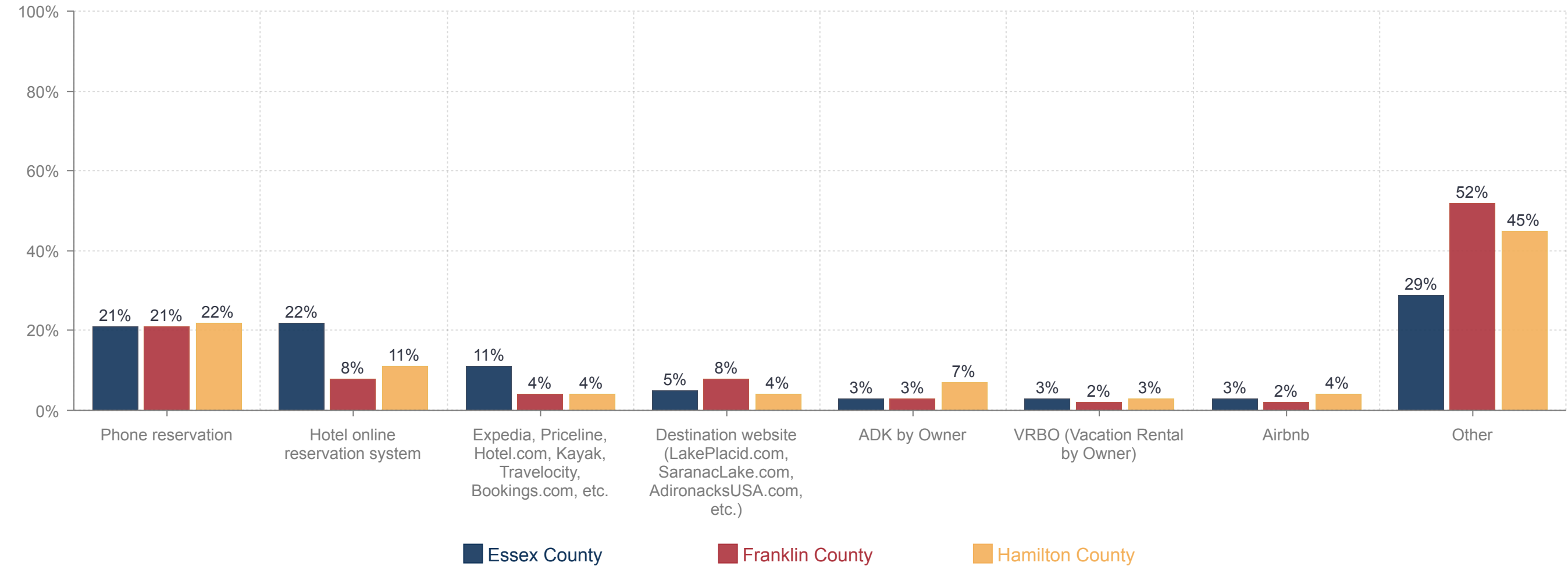
# Lodging Accommodations

Essex County travelers



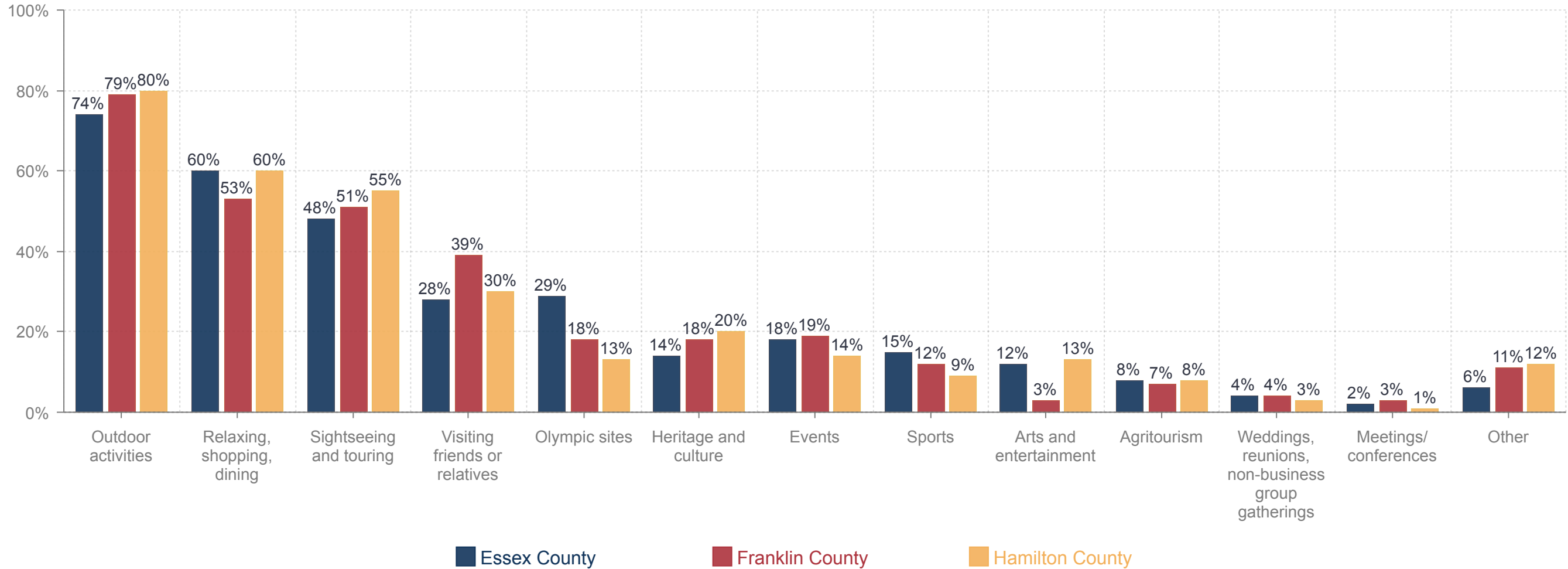
# Method of Booking Lodging Reservation

All travelers



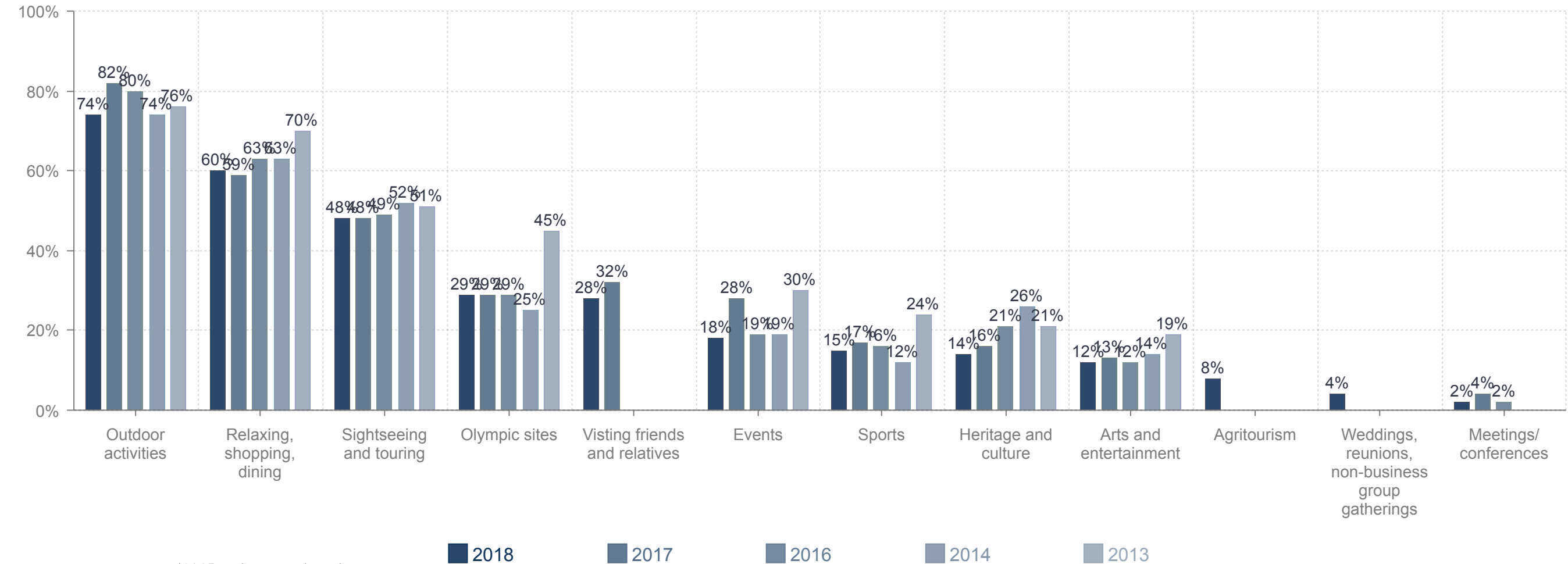
# Key Attractions

All travelers



# Five Year Key Attractions\*

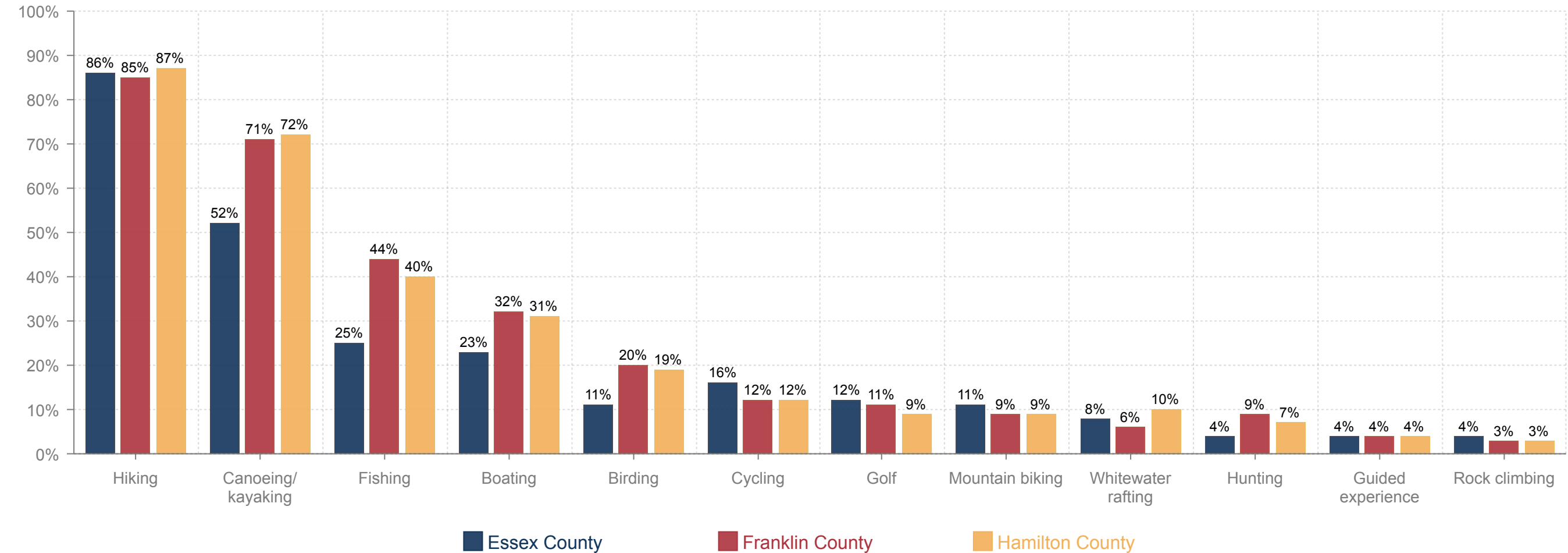
Essex County travelers



\*2015 study not conducted

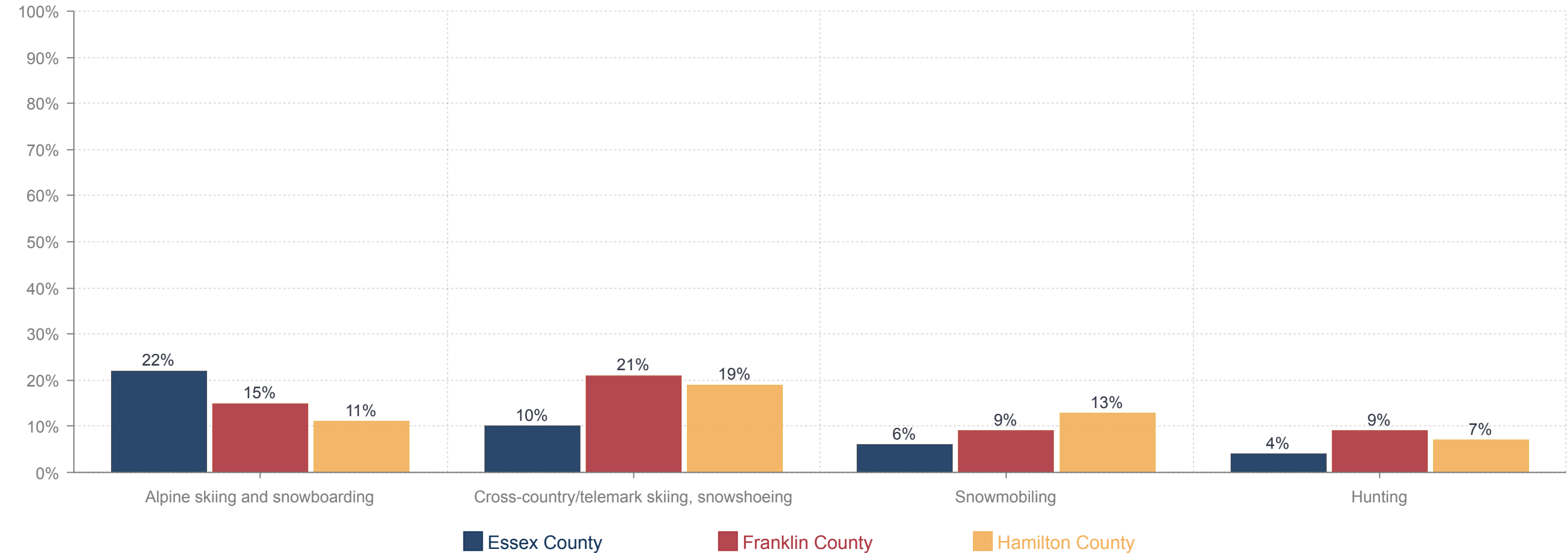
# Outdoor Spring/Summer Activities

All travelers



# Outdoor Fall/Winter Activities

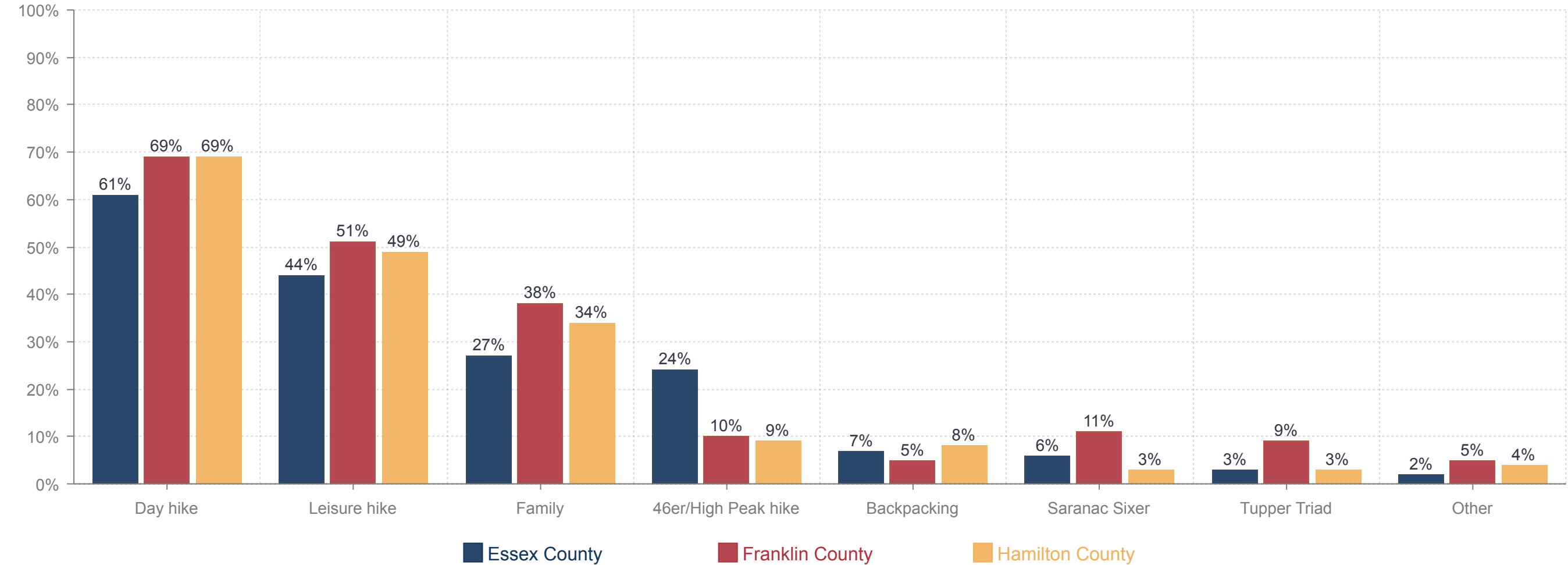
All travelers





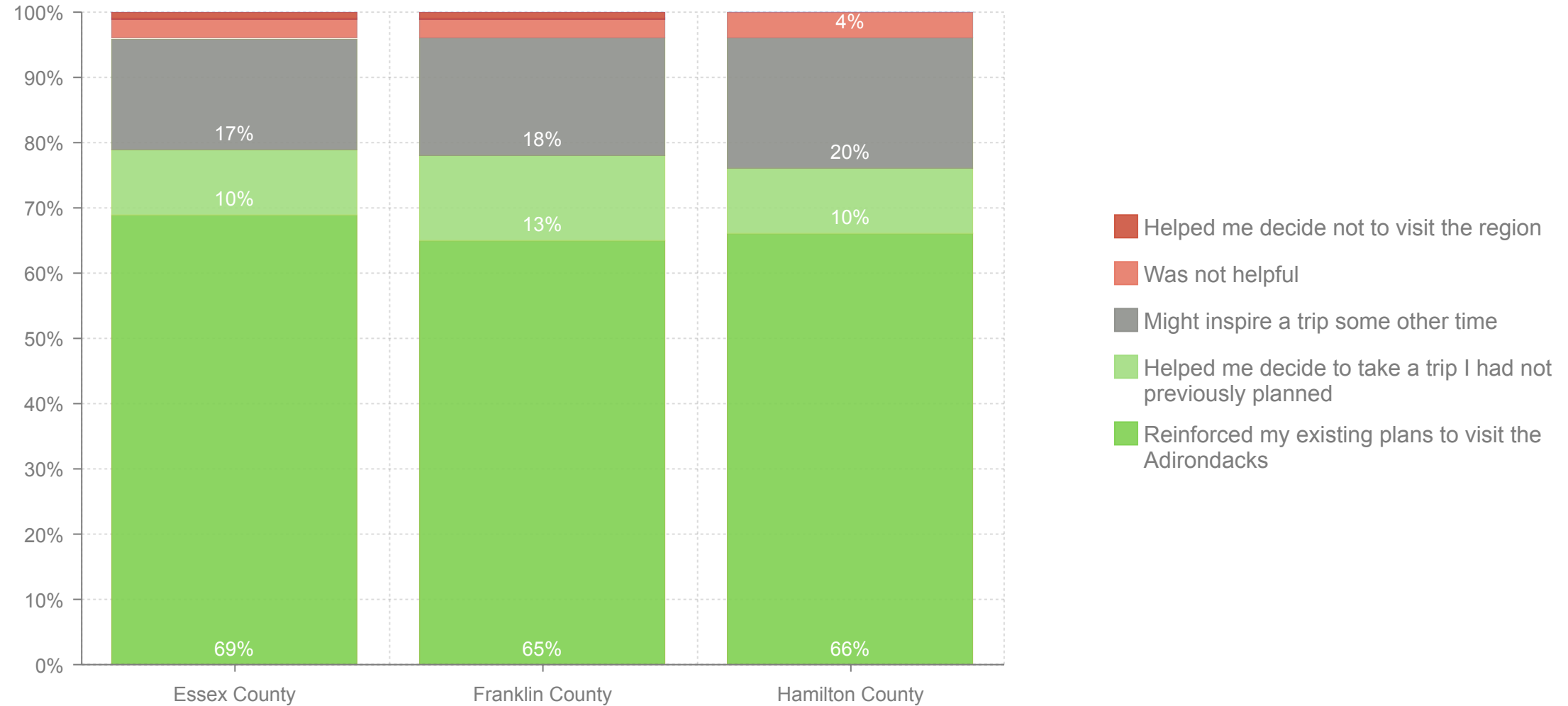
# Hiking Breakdown

All travelers



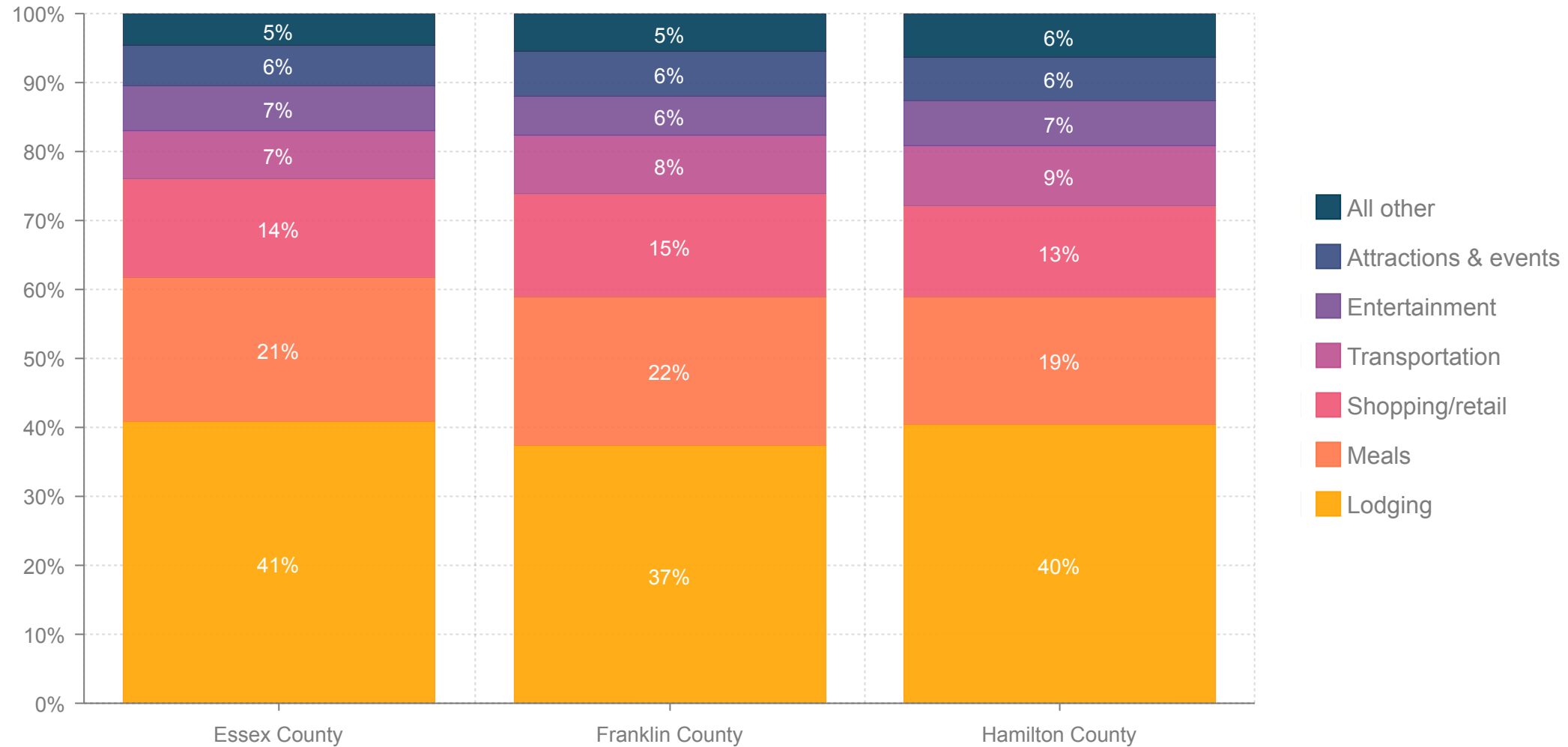
# Conversion Rate from Viewing ROOST Marketing Materials

All travelers



# Total Expenditure Allocation by Category

All travelers



# Mean Party Expenditures

All travelers

|                           | Essex County | Franklin County | Hamilton County |
|---------------------------|--------------|-----------------|-----------------|
| Lodging                   | \$168        | \$92            | \$126           |
| Meals                     | \$86         | \$53            | \$58            |
| Shopping/retail           | \$60         | \$37            | \$41            |
| Transportation            | \$29         | \$21            | \$27            |
| Entertainment             | \$28         | \$14            | \$20            |
| Attractions & events      | \$25         | \$16            | \$20            |
| All other                 | \$19         | \$13            | \$20            |
| Average daily expenditure | \$415        | \$246           | \$312           |
| Average total expenditure | \$1,151      | \$911           | \$934           |

# Five Year Mean Party Expenditures

Essex County travelers

| Category                  | Five year average | 2018    | 2017  | 2016    | 2014    | 2013    |
|---------------------------|-------------------|---------|-------|---------|---------|---------|
| Attractions & events      | \$76              | \$68    | \$57  | \$78    | \$81    | \$97    |
| Entertainment             | \$74              | \$76    | \$59  | \$76    | \$87    | \$71    |
| Transportation            | \$112             | \$80    | \$69  | \$92    | \$130   | \$189   |
| Lodging                   | \$512             | \$470   | \$447 | \$433   | \$507   | \$705   |
| Meals                     | \$252             | \$241   | \$198 | \$226   | \$244   | \$353   |
| Shopping/retail           | \$145             | \$164   | \$95  | \$146   | \$152   | \$170   |
| All other                 | \$75              | \$52    | \$23  | \$110   | \$128   | \$61    |
| Average daily expenditure | \$360             | \$415   | \$340 | \$387   | \$338   | \$323   |
| Average total expenditure | \$1,246           | \$1,151 | \$948 | \$1,161 | \$1,329 | \$1,646 |

\*2015 study not conducted

# Essex County Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

*adirondacks, usa*



# Visitor Profile

All Essex County travelers

- Average age of respondents was 54 years old; slightly above the five-year average visitor age of 52
- Mean annual reported household income of travelers was \$107,065, an approximate 4% increase from prior year
- Average reported total traveler party size was 3.9 persons, including an average of 2.9 adults and 1 child; party size and composition has stayed consistent across the past five-year period
- Average stay reported by 2018 travelers was 2.8 nights, consistent with prior year

# Visitor Profile

All Essex County travelers

- Hotels/motels were selected as the lodging choice by 55% of respondents, the highest proportion within 15 years of research
- For the first time, private homes were the second most commonly noted accommodation, by 13% of respondents
- 12% of respondents stayed with family and friends and 11% camped/stayed in RV park (lower figure than seen in recent years)
- Outdoor activities remained the largest draw to the area, although a lower margin than seen previously, with 75% of respondents selecting this attraction

# Visitor Profile

All Essex County travelers

- “Relaxing, dining and shopping” remained the second most frequently reported draw to visit the region (60%), followed by sightseeing (48%). Olympic attractions remained the fourth most commonly reported draws to visit (29%)
- Hiking remained the most popular reported outdoor activity, with 86% of respondents who reported seeking outdoor activities indicating interest in this activity
- Other popular outdoor activities of interest (in descending order): canoeing/kayaking, fishing, boating and skiing/boarding. Level of expressed interest in skiing and riding fell substantially among 2018 visitors from the prior year (from 33% to 22%)

# Visitor Profile

All Essex County travelers

- Average daily traveler party spending in 2018 estimated at \$415 per day, substantially higher than the reported 2017 level (\$340) and the 5-year average of \$361
- Total estimated trip expenditure was \$1,151, an 18% increase from 2017 and nearer to the average reported expenditure from 2016 travelers. Average expenditures in shopping were particularly increased and secondarily, meals
- 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%

# Visitor Profile

All Essex County travelers

- Nearly 217,000 individuals contacted ROOST via its various outlets for travel information about Essex County in 2018, a slight increase over recent years
- ROI for marketing expenditures for 2018 is \$69 for every \$1 spent (69:1), demonstrating continued strength of the agency in reaching travelers and positively impacting their visits to and expenditures within the county