Leisure Travel Study Essex, Franklin, and Hamilton County Region 2018 County Visitor Profiles and Regional Return on Marketing Investment Analysis

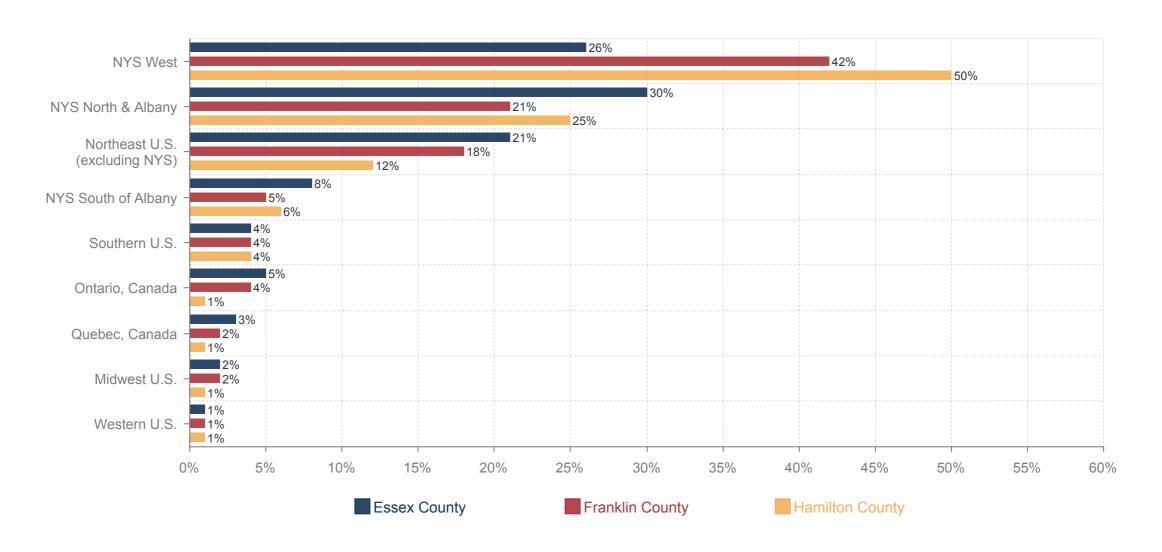


Project Background & Methodolgy

- 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



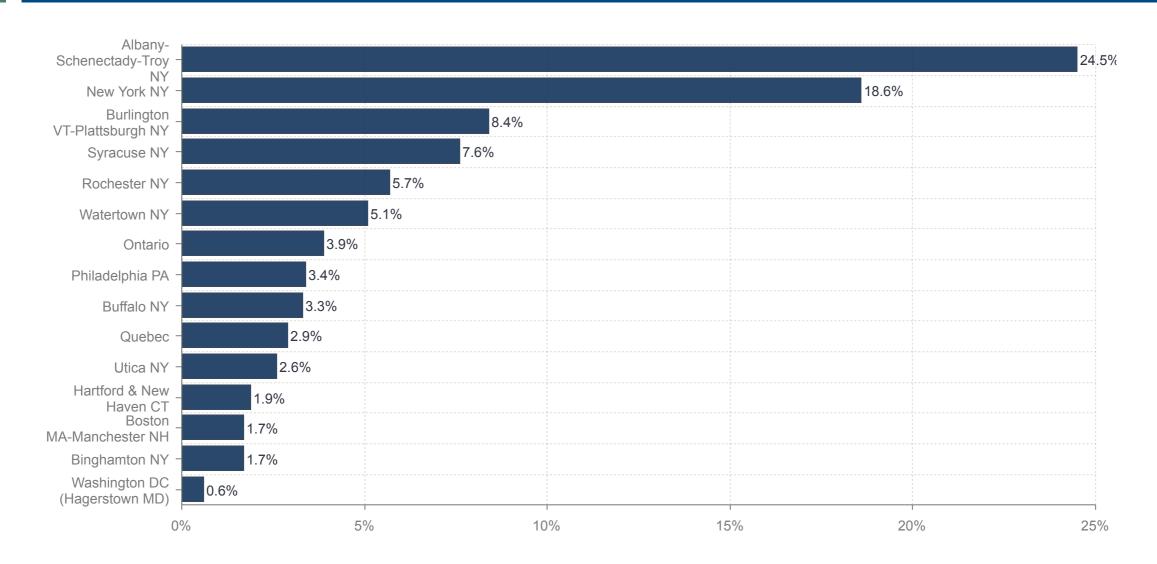
Area of Residence





Area of Residence by DMA

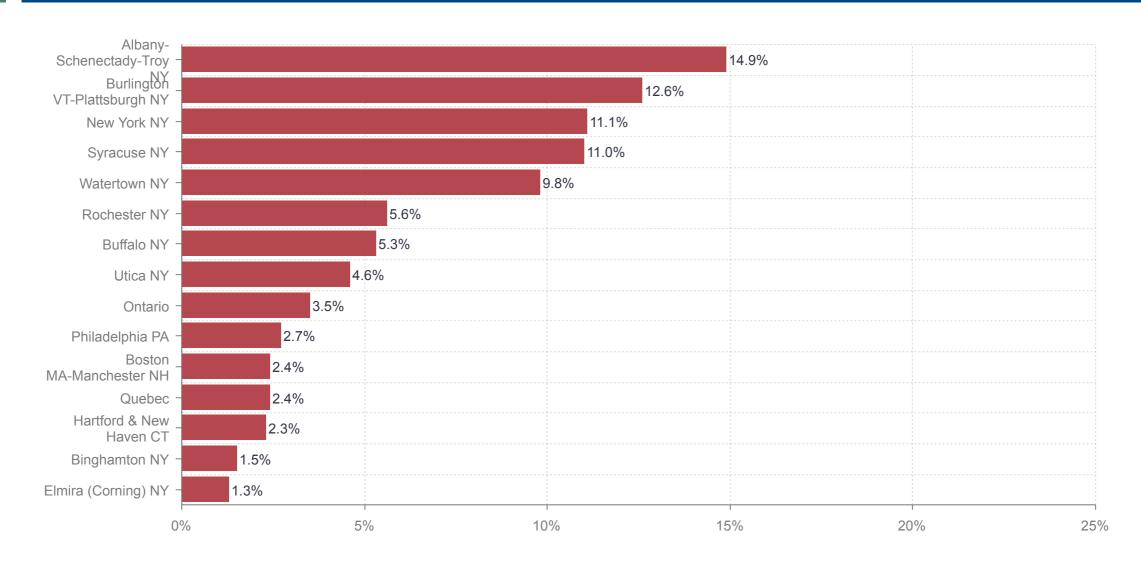
Essex County travelers





Area of Residence by DMA

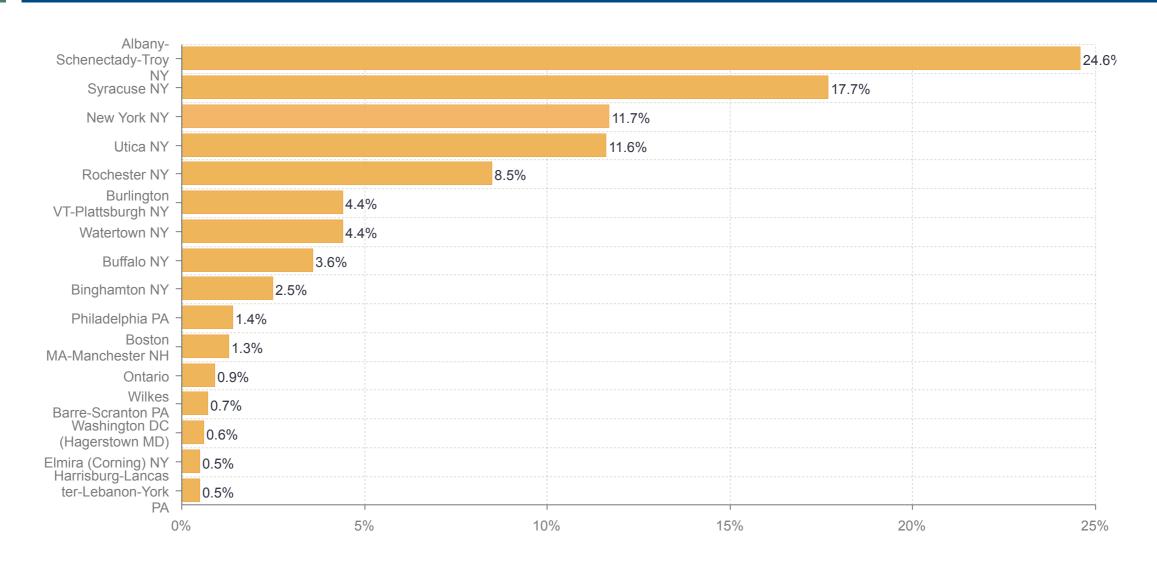
Franklin County travelers





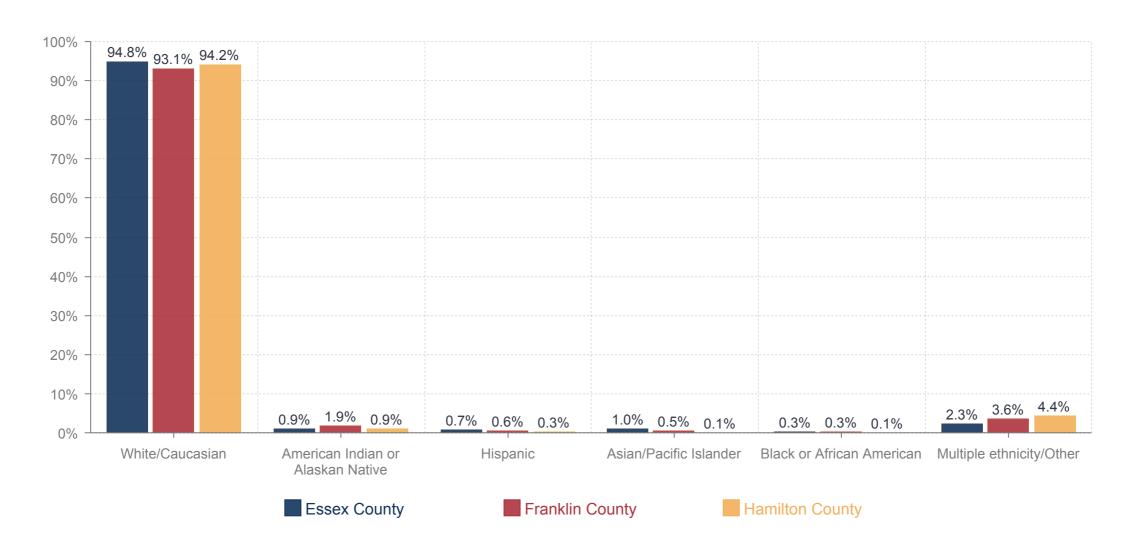
Area of Residence by DMA

Hamilton County travelers



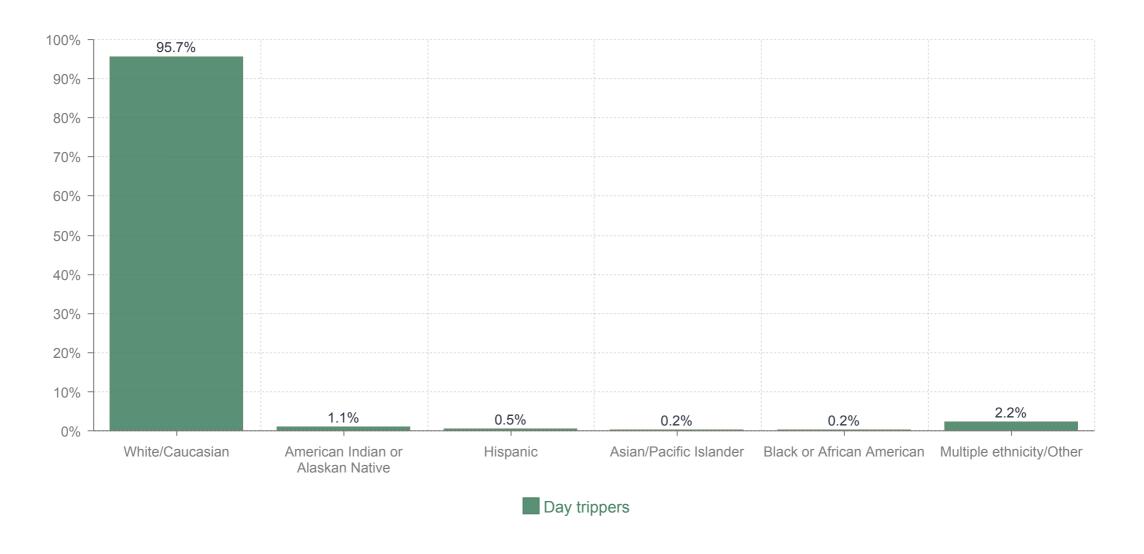


Ethnicity





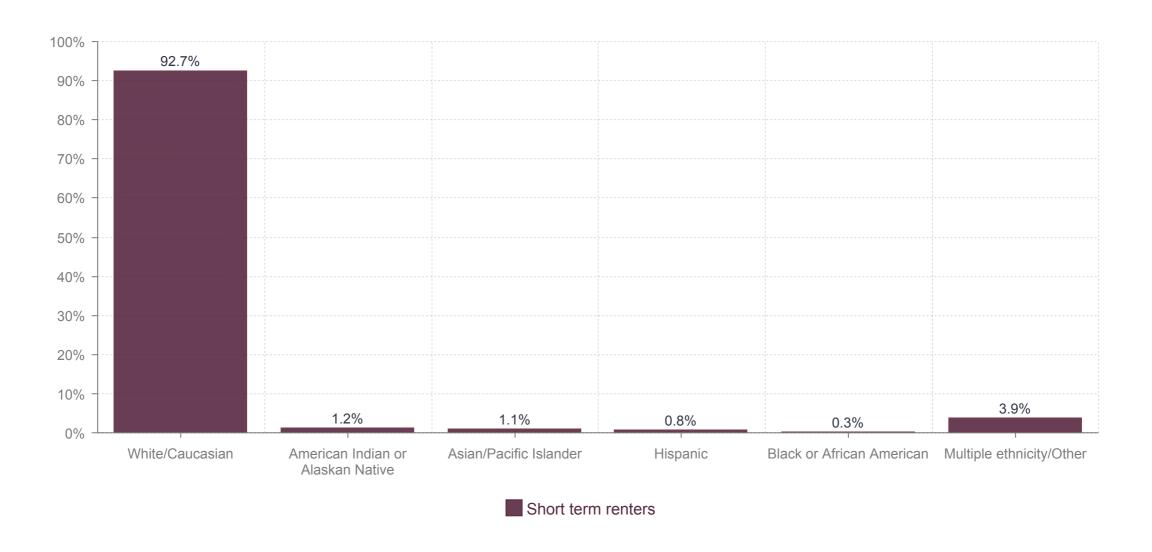
EthnicityDay trippers





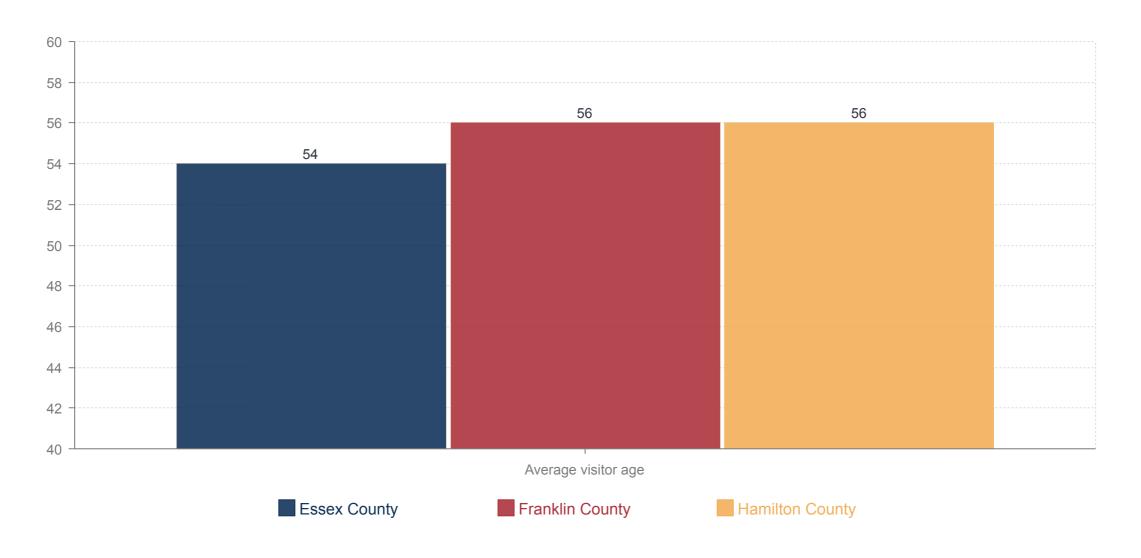
Ethnicity

Short term renters





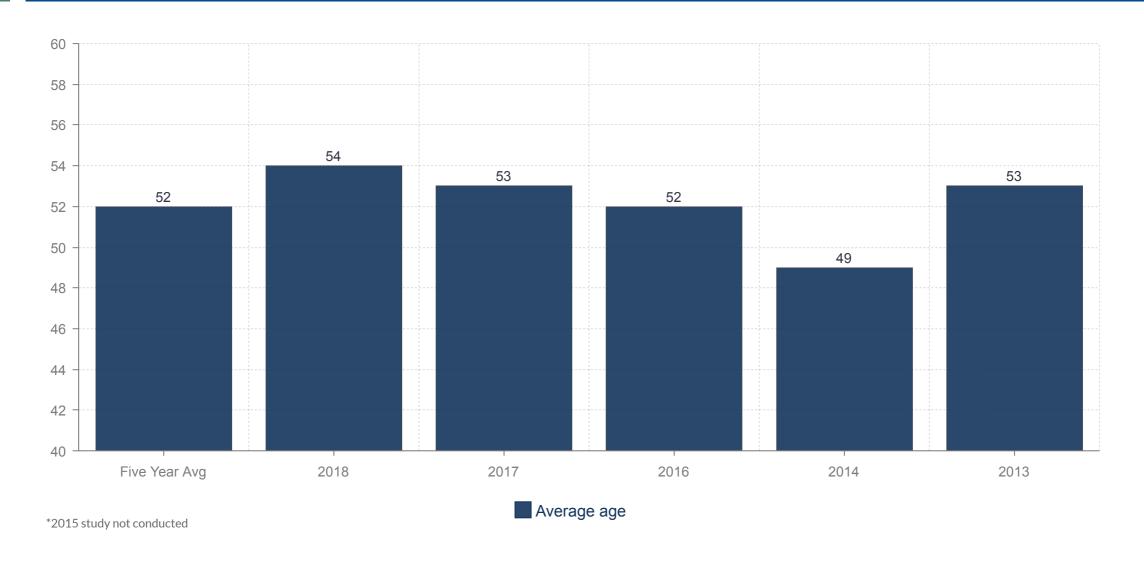
Average Age





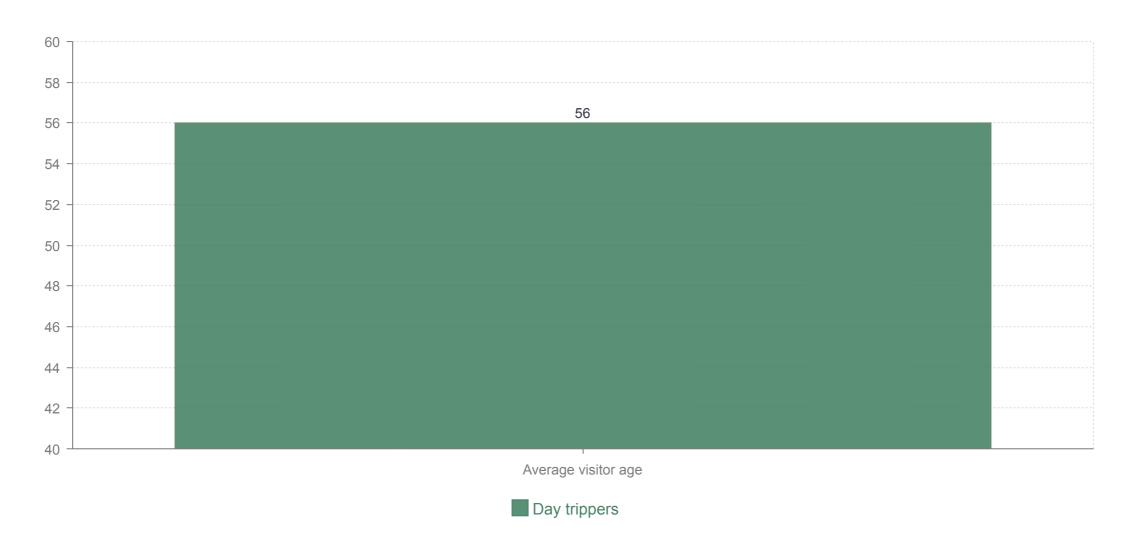
Five Year Average Age*

Essex County travelers





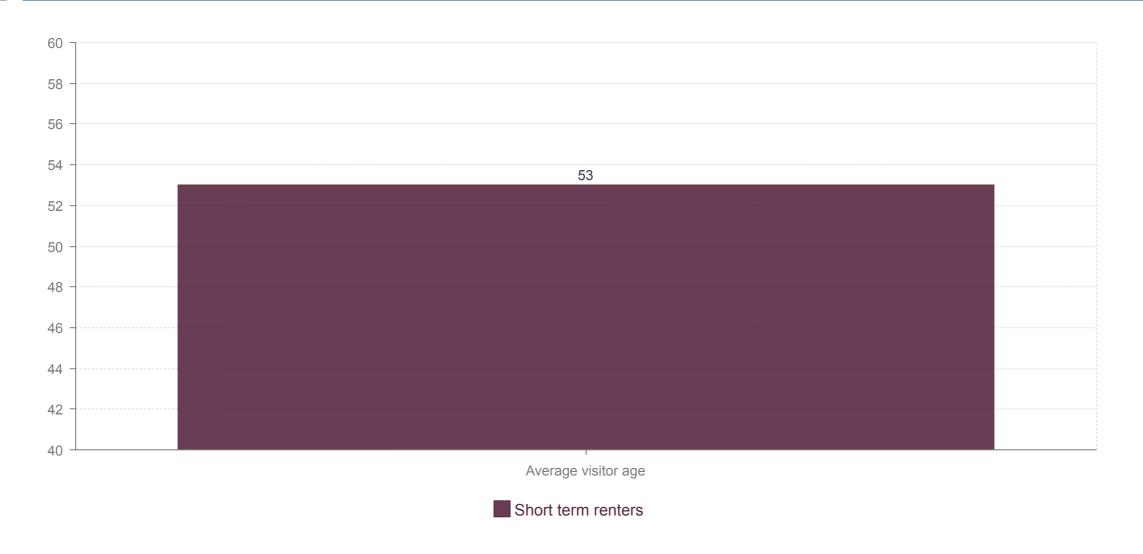
Average Age Day trippers





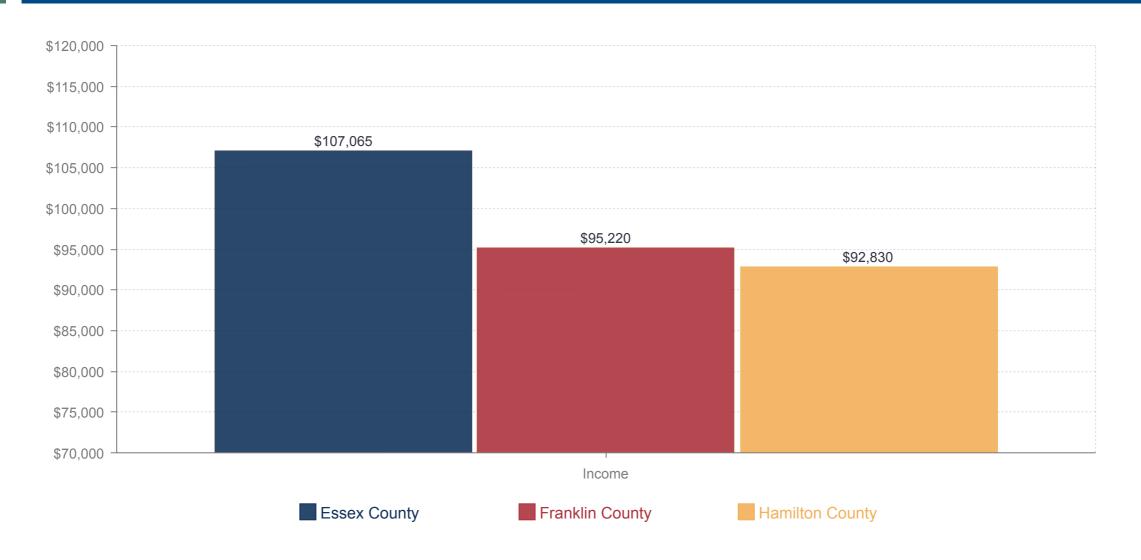
Average Age

Short term renters



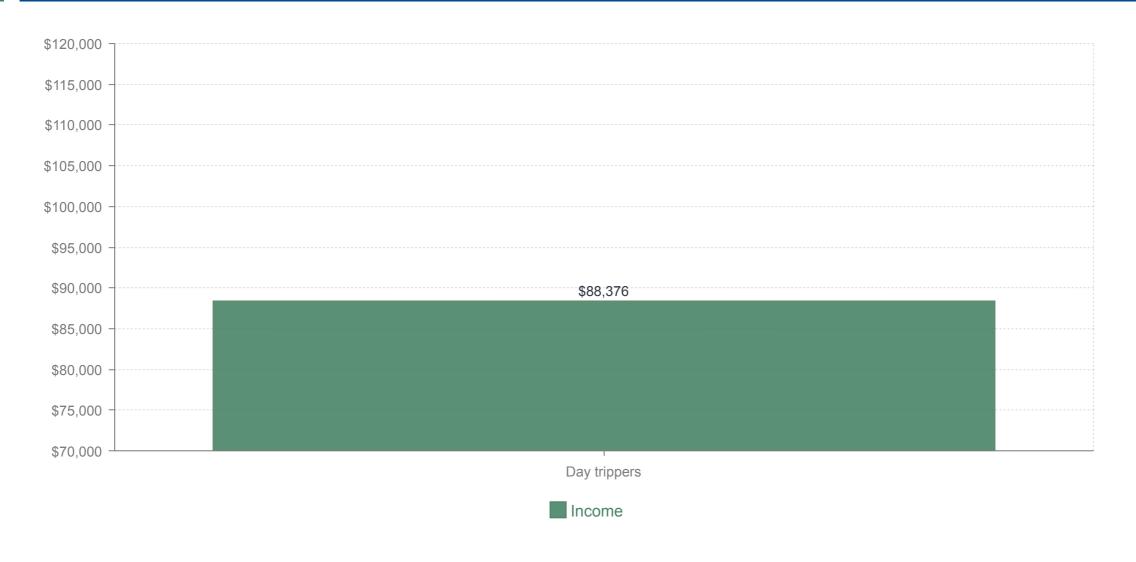


Average Income





Average Income Day trippers





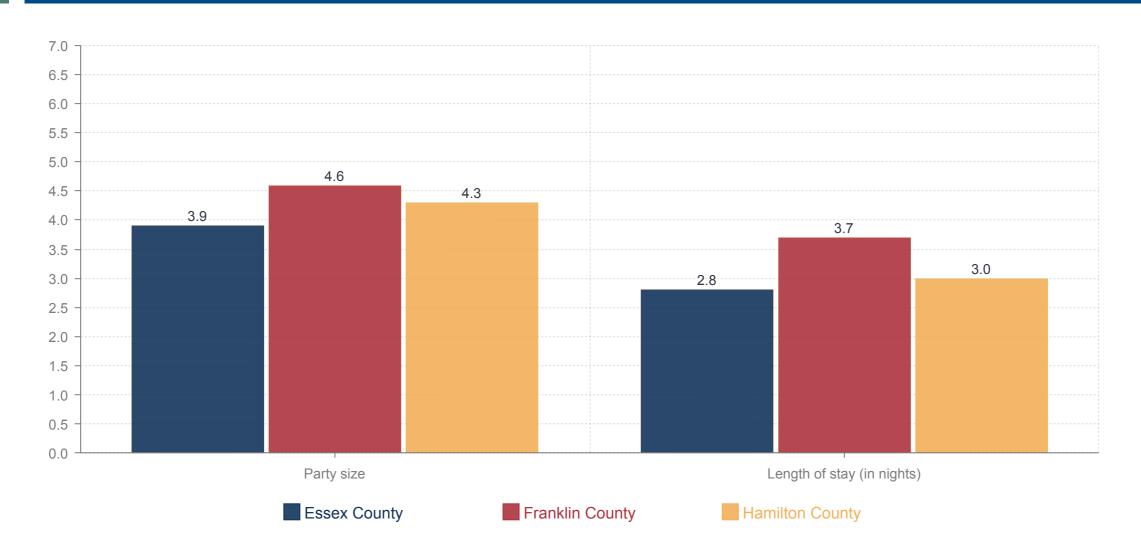
Average Income

Short term renters





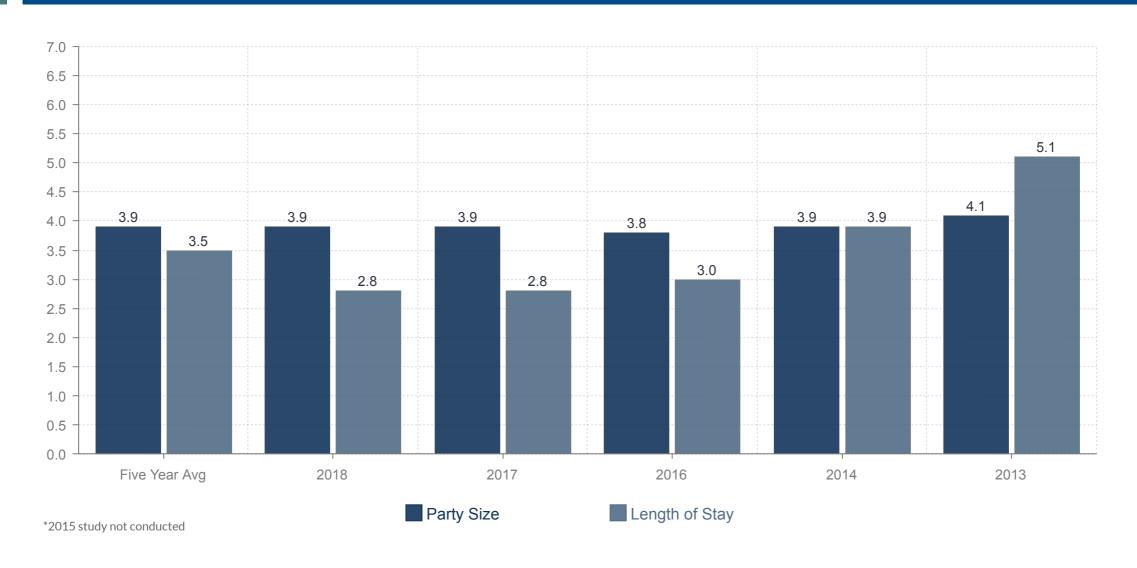
Party Size/Length of Stay





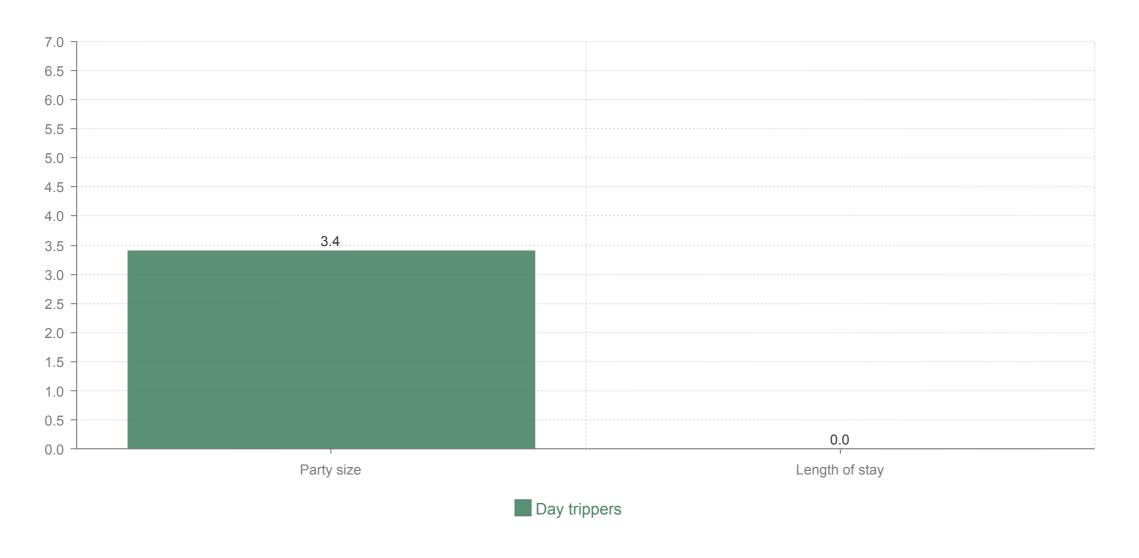
Five Year Average Party Size / Length of Stay*

Essex County travelers



Party Size / Length of Stay

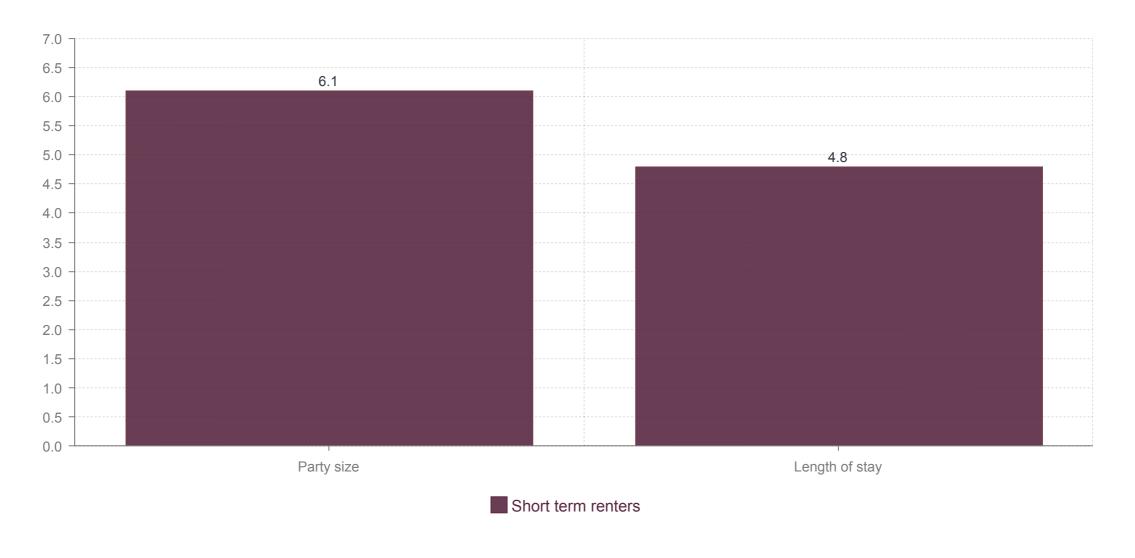
Day trippers





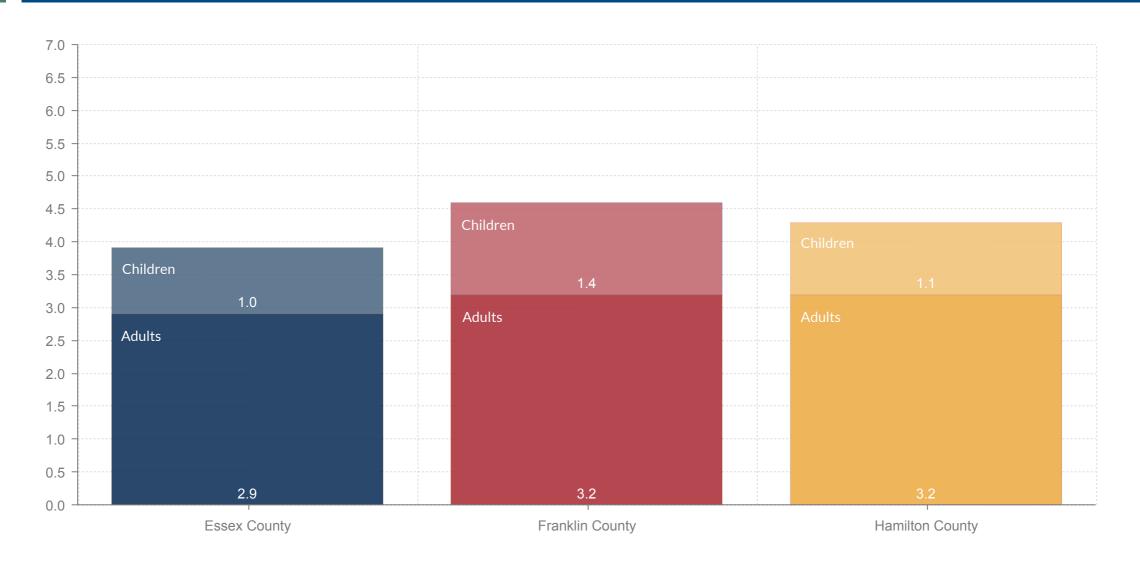
Party Size / Length of Stay

Short term renters





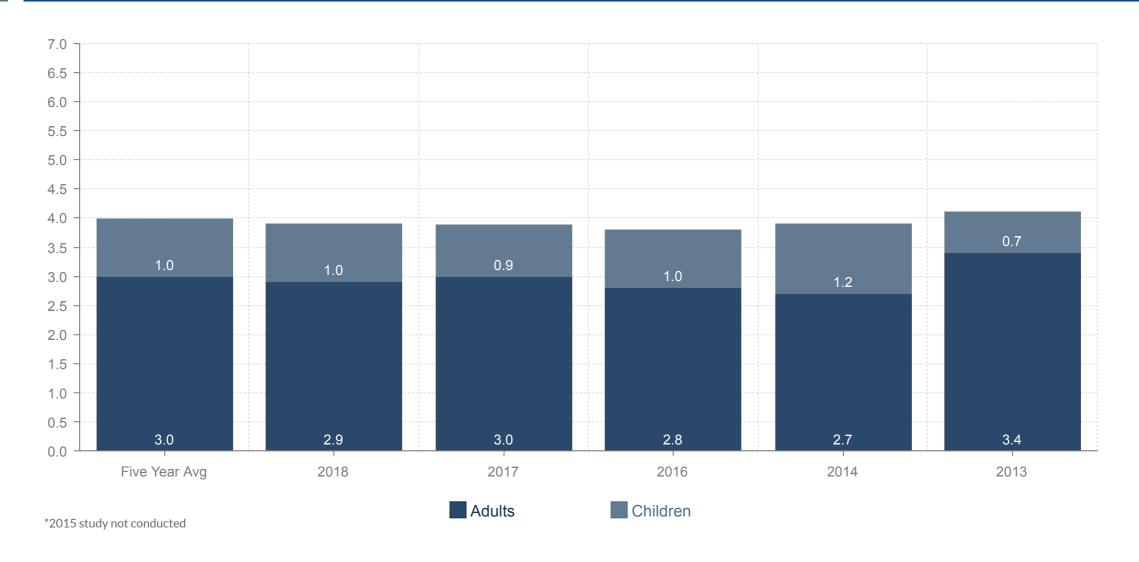
Party Composition





Five Year Average Party Composition

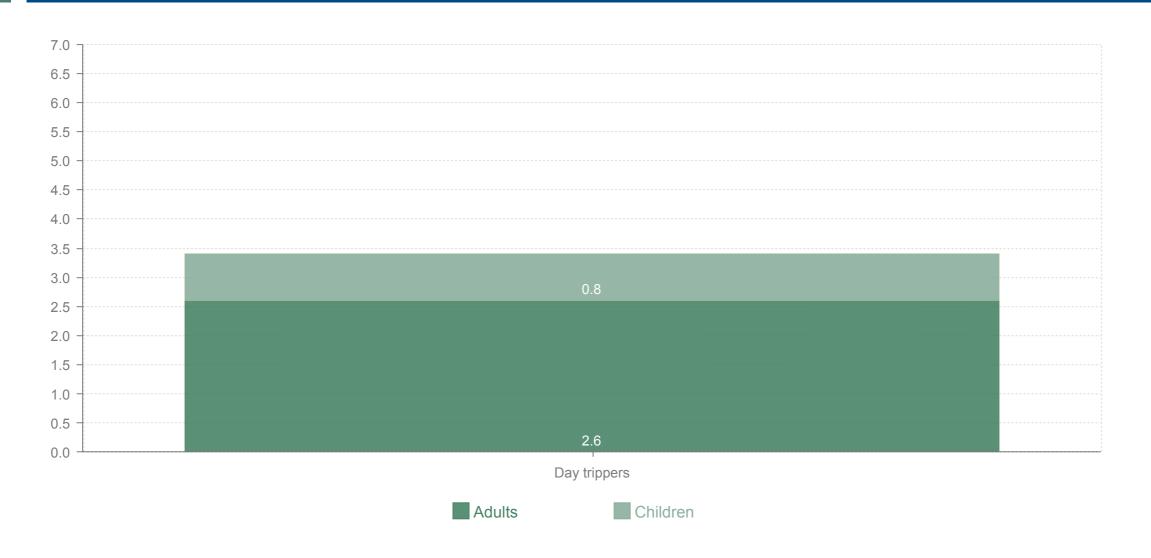
Essex County travelers





Party Composition

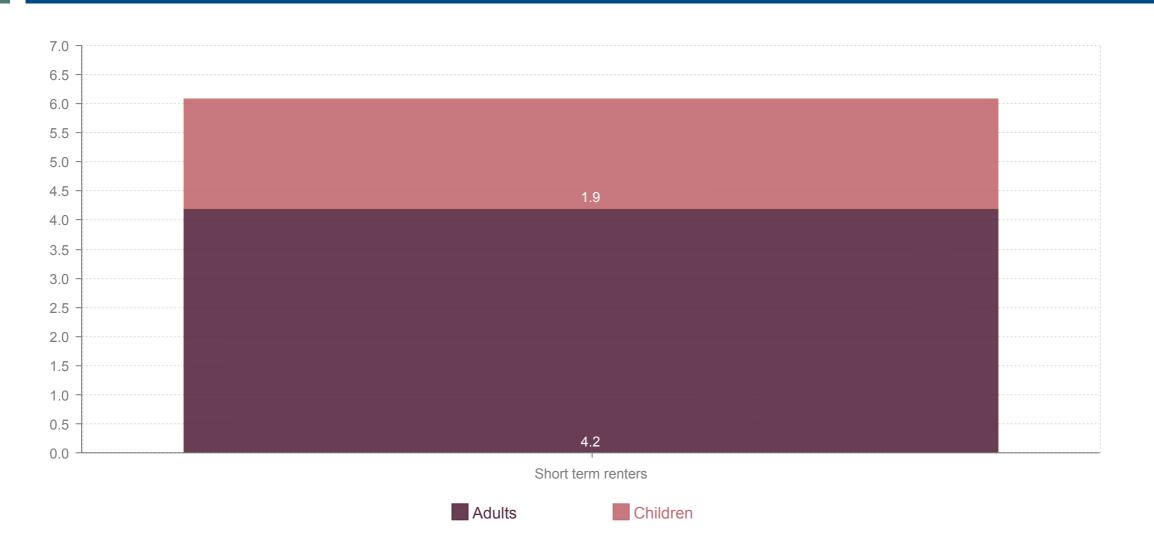
Day trippers





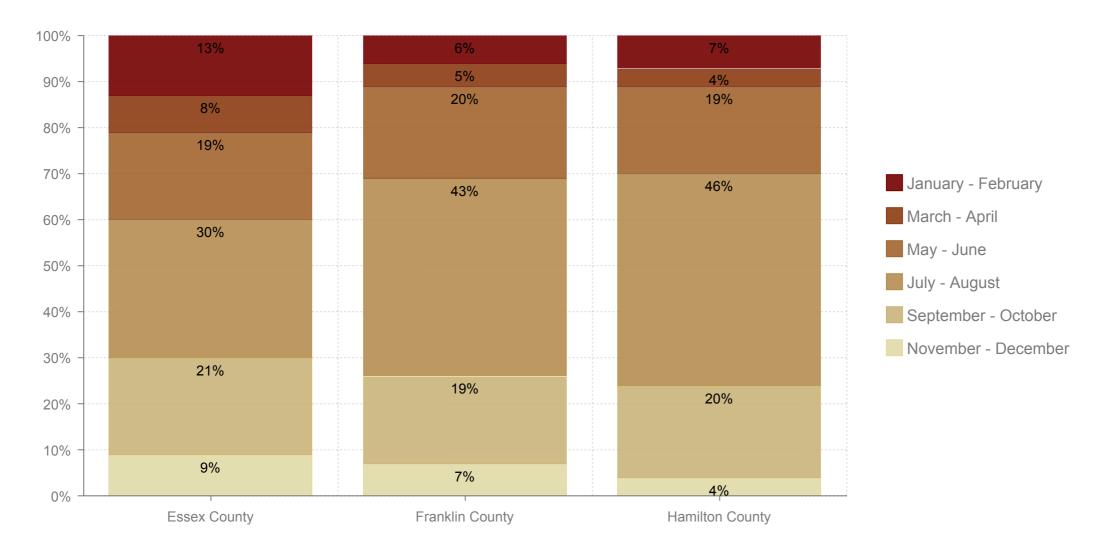
Party Composition

Short term renters





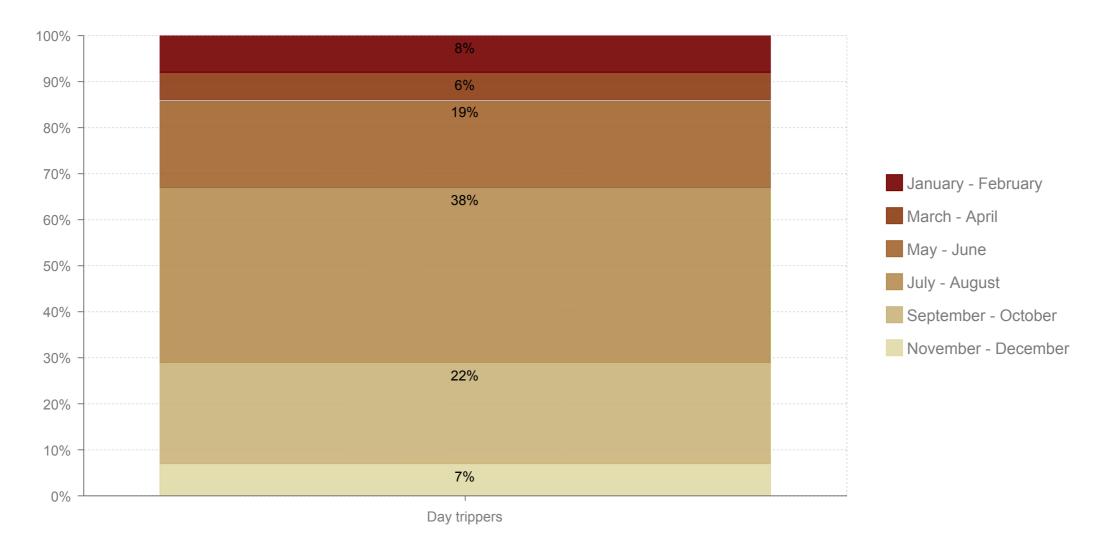
Time of Year Visited





Time of Year Visited

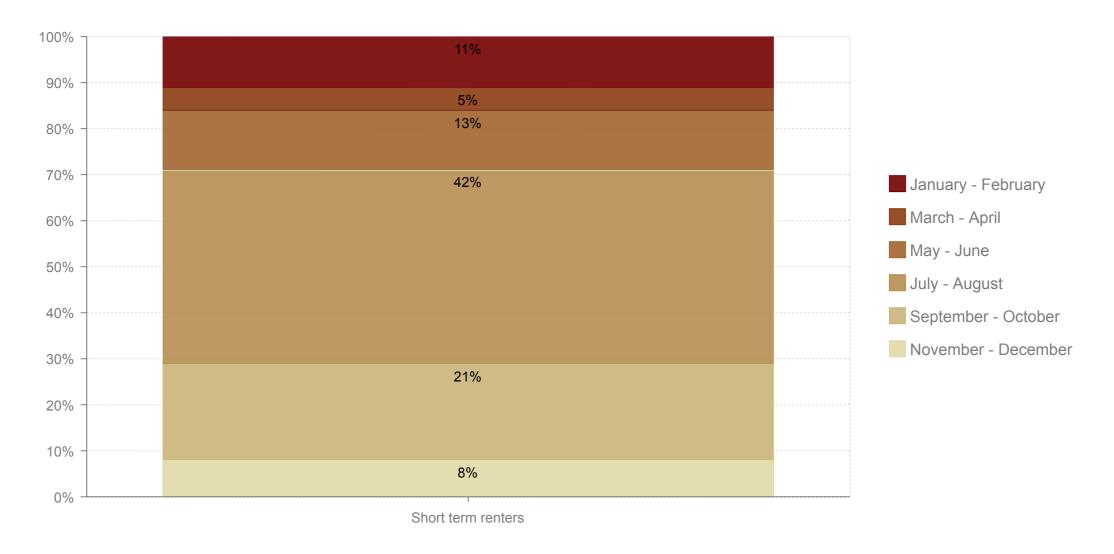
Day trippers





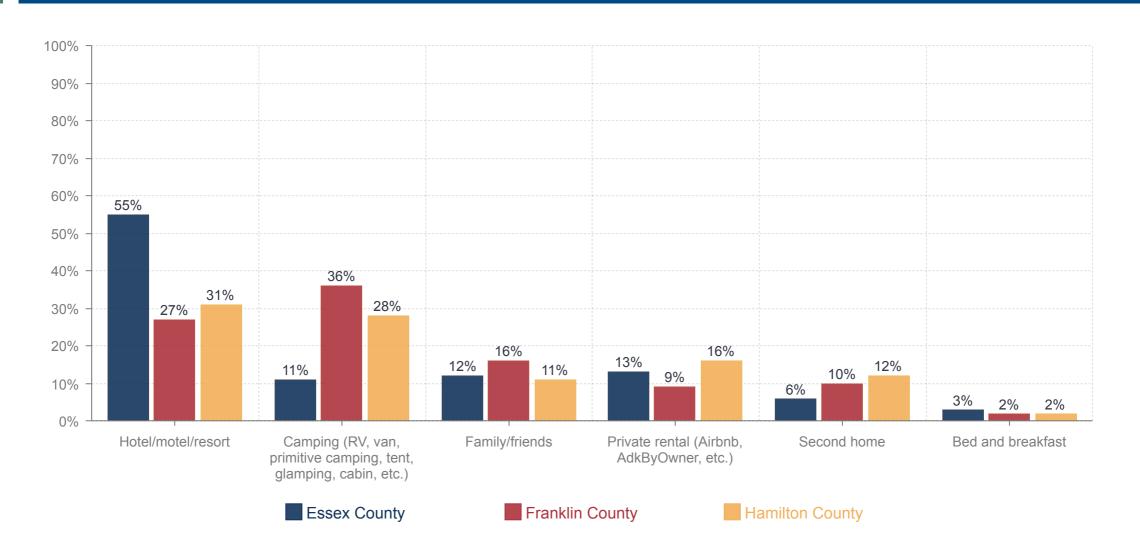
Time of Year Visited

Short term renters





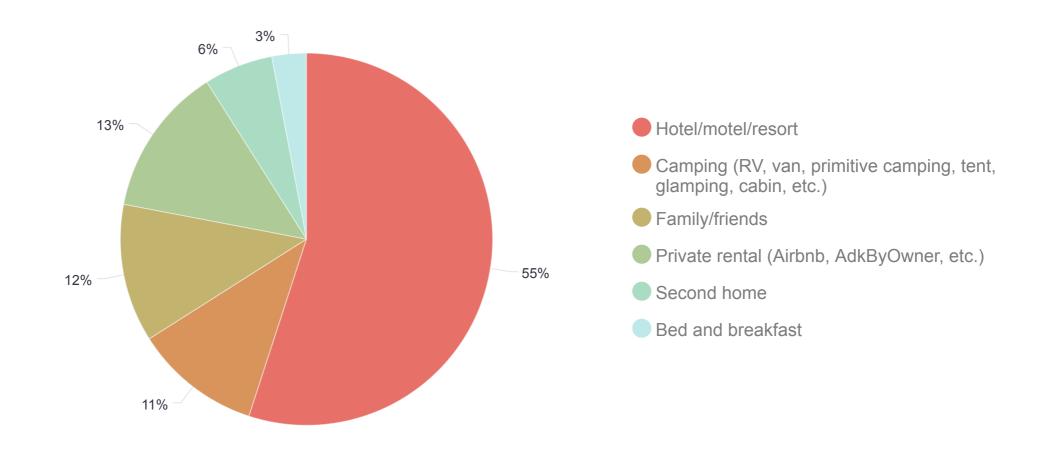
Lodging Accomodations





Lodging Accommodations

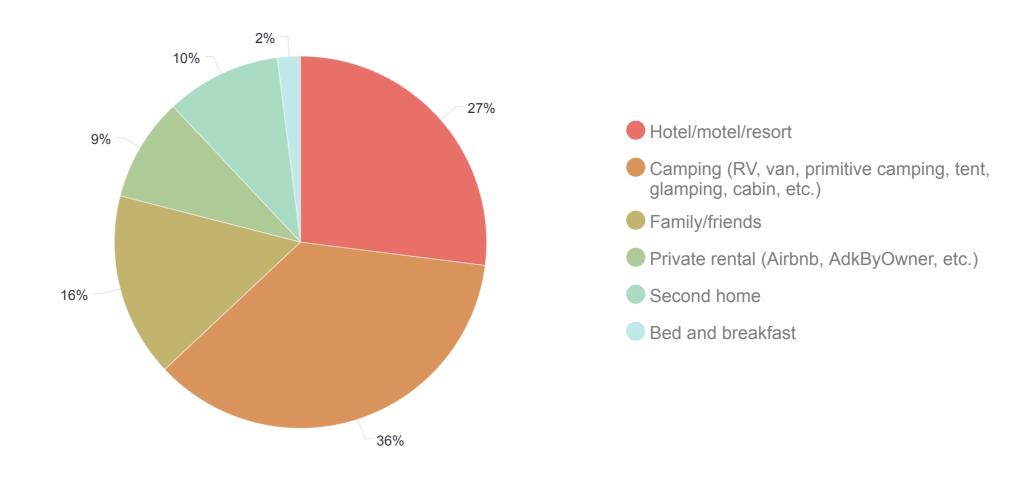
Essex County travelers





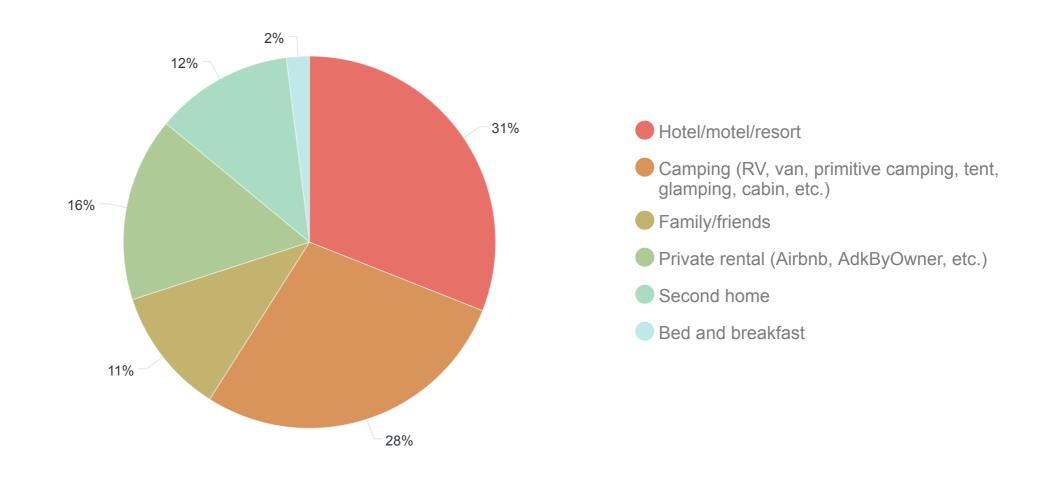
Lodging Accommodations

Franklin County travelers



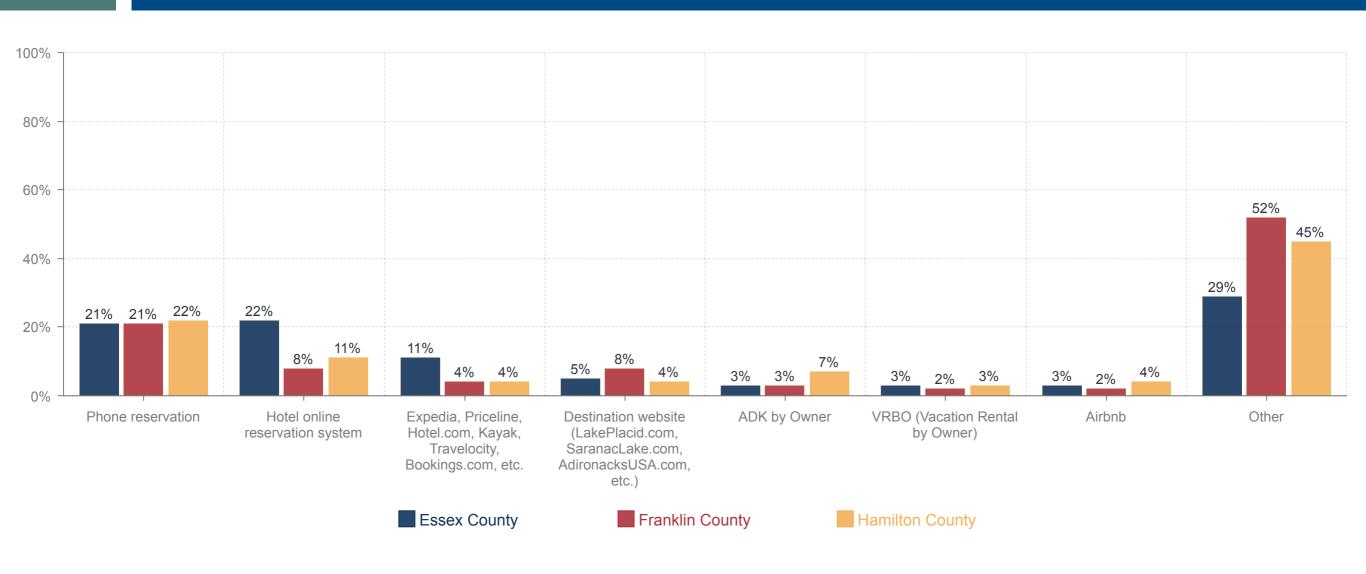
Lodging Accommodations

Hamilton County travelers



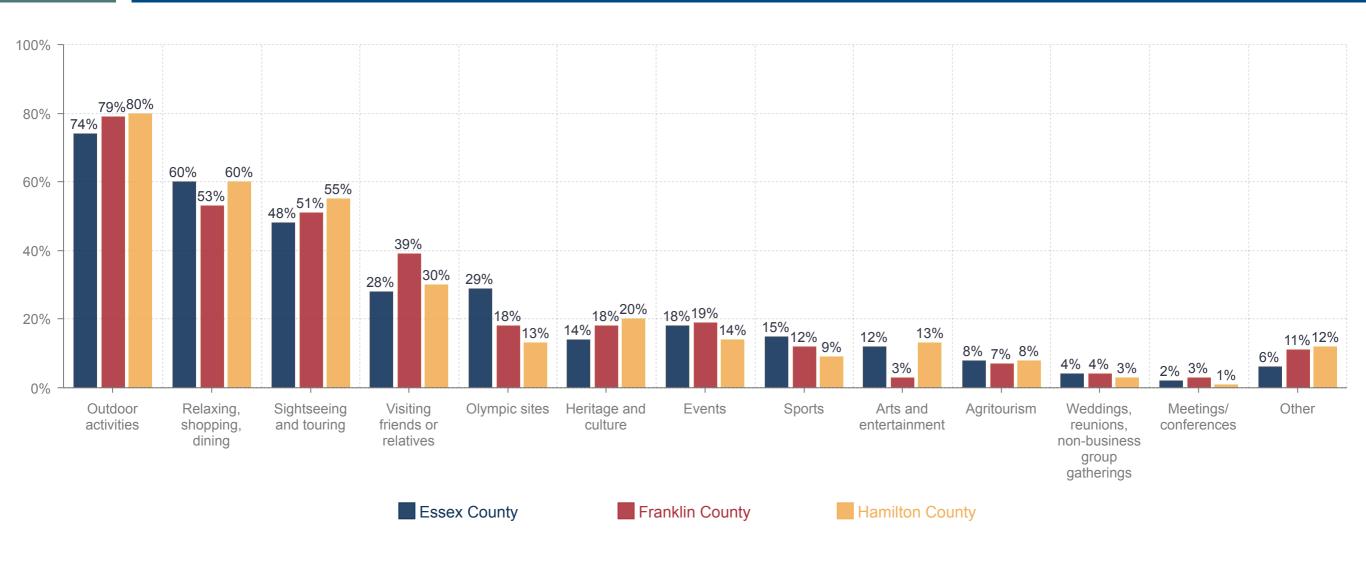


Method of Booking Lodging Reservation





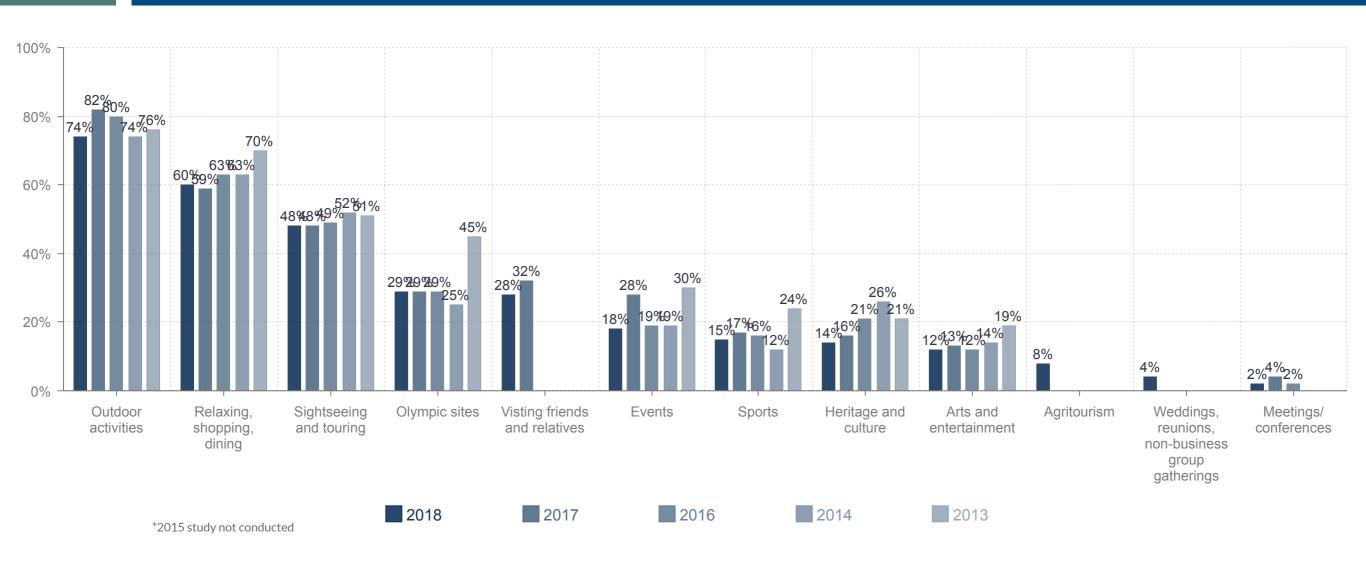
Key Attractions





Five Year Key Attractions*

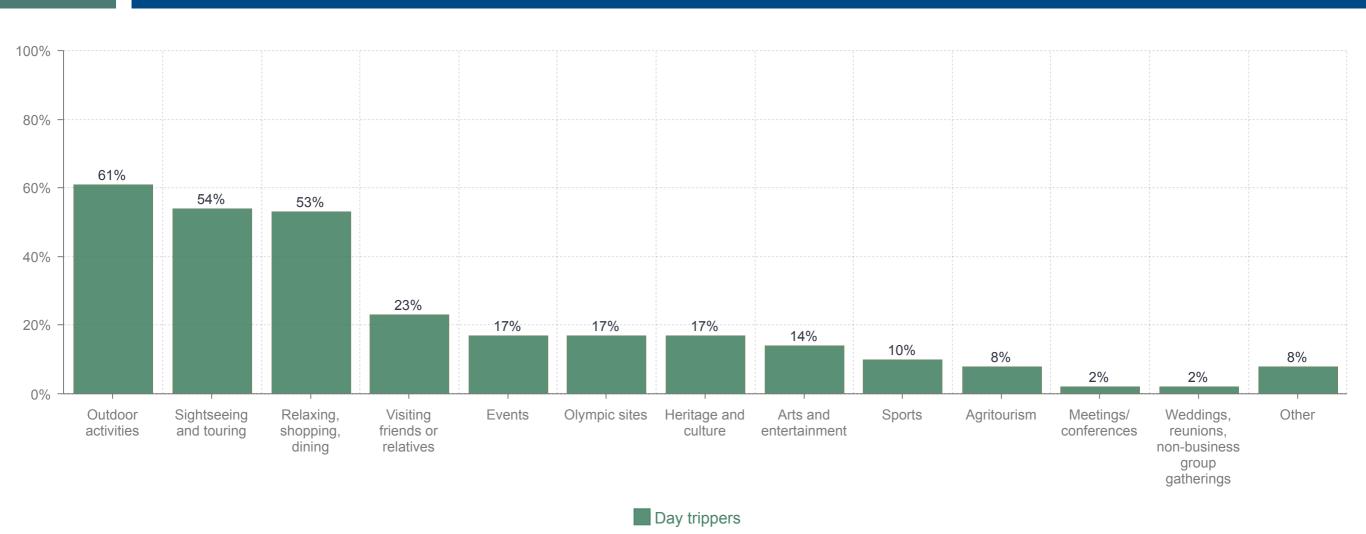
Essex County travelers





Key Attractions

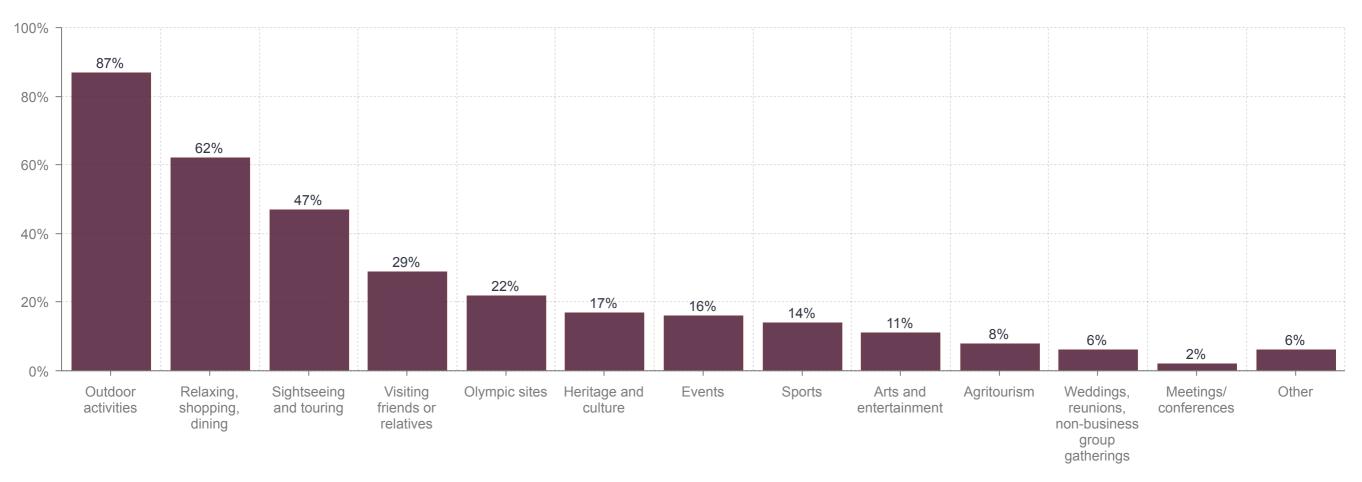
Day trippers





Key Attractions

Short term renters

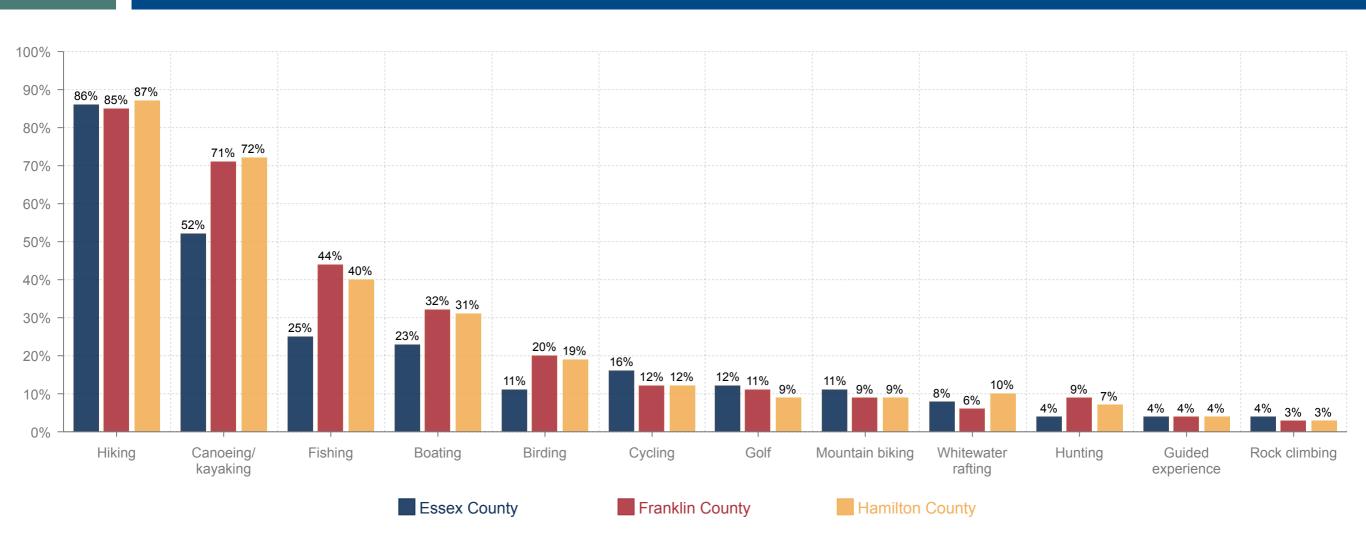






Outdoor Spring/Summer Activities

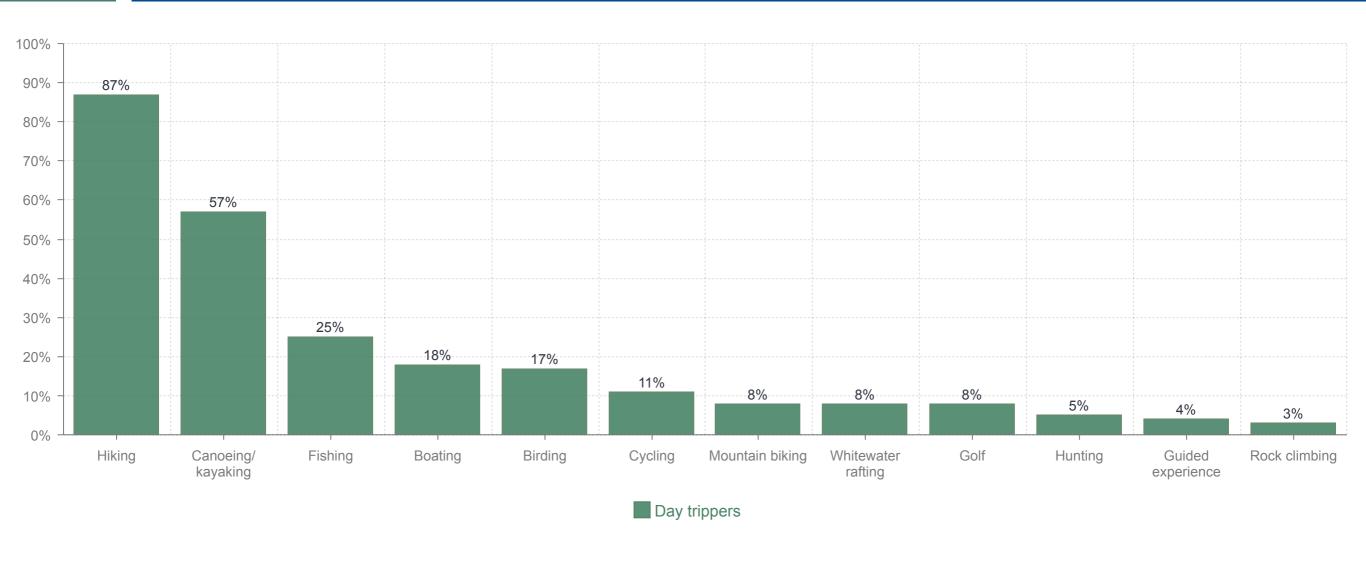
All travelers





Outdoor Spring/Summer Activities

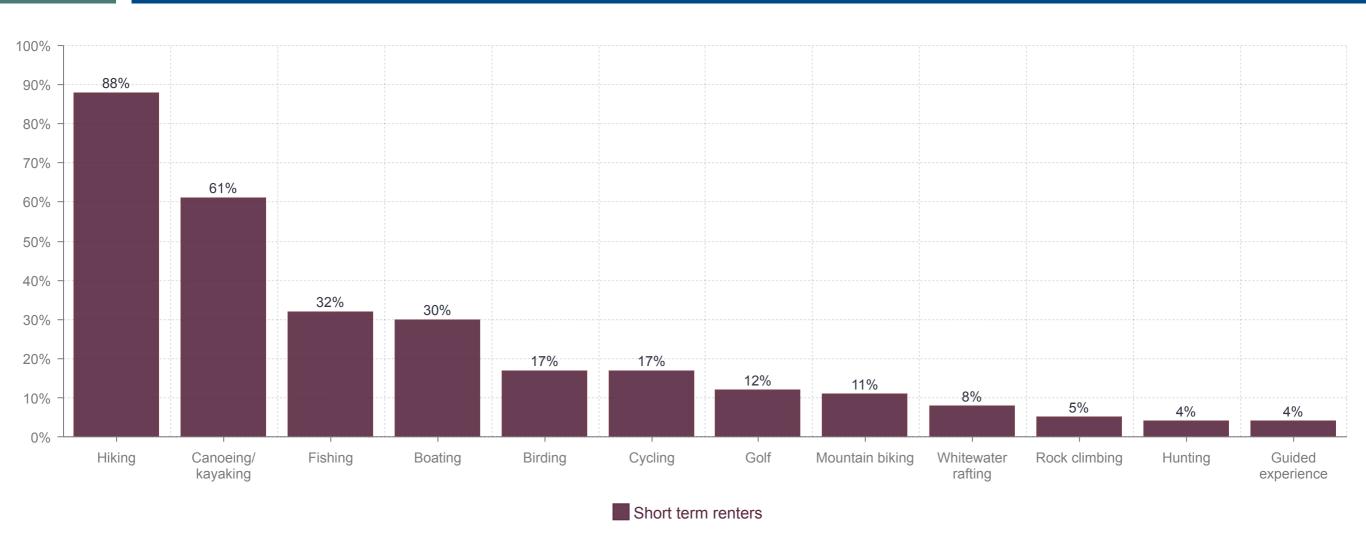
Day trippers





Outdoor Spring / Summer Activities

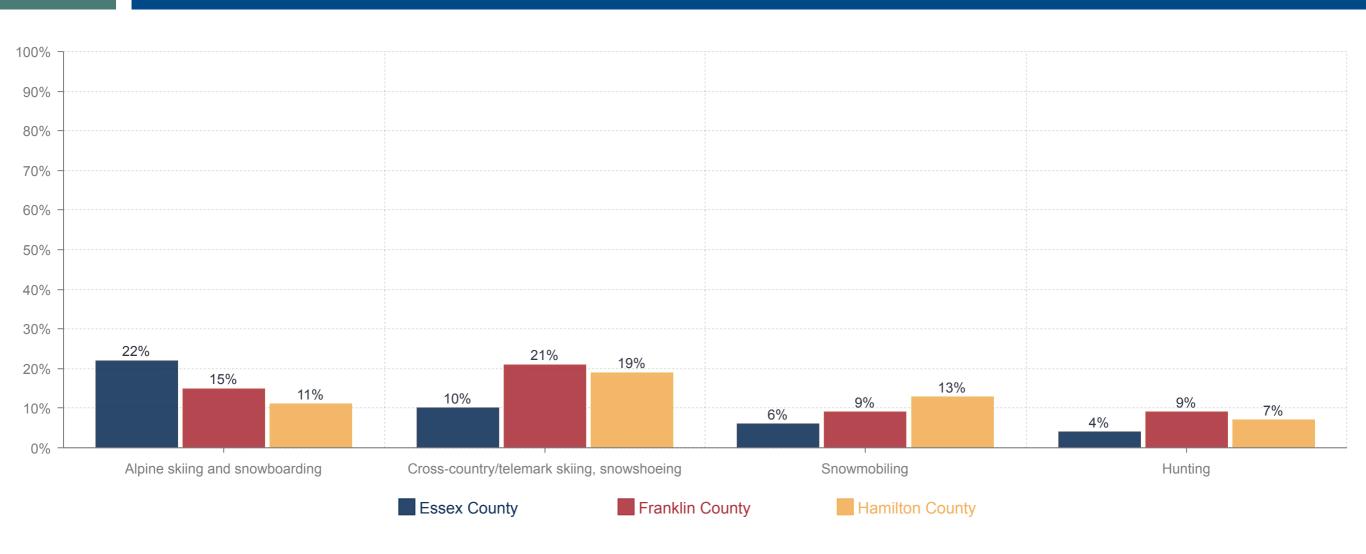
Short term renters





Outdoor Fall/Winter Activities

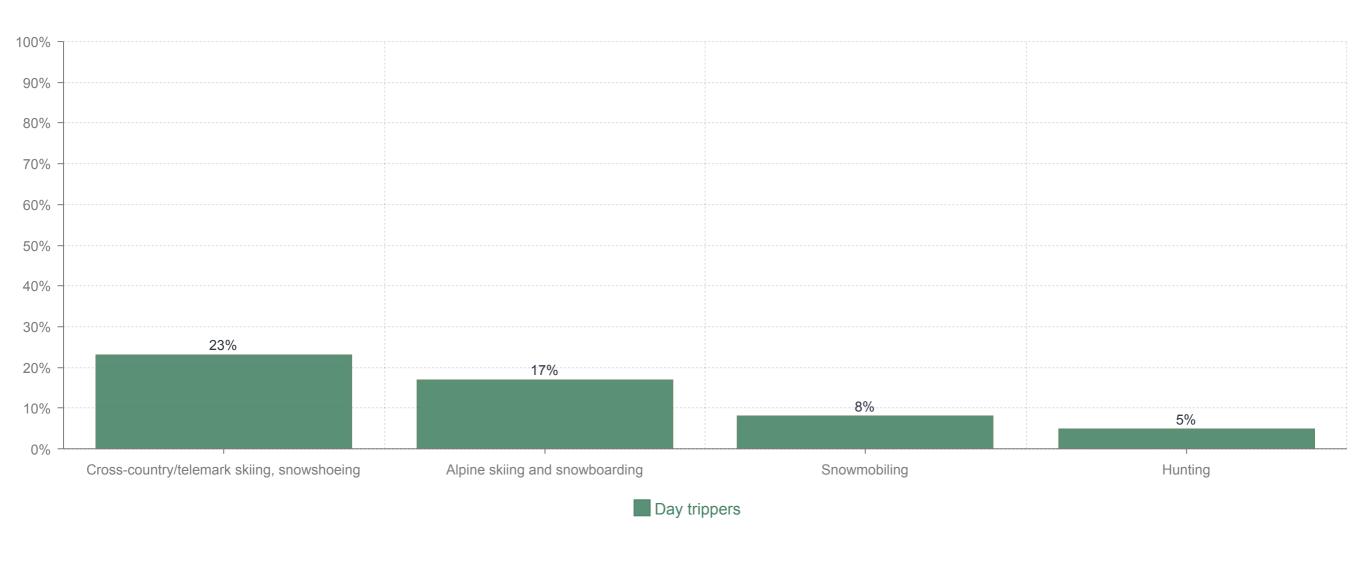
All travelers





Outdoor Fall/Winter Activities

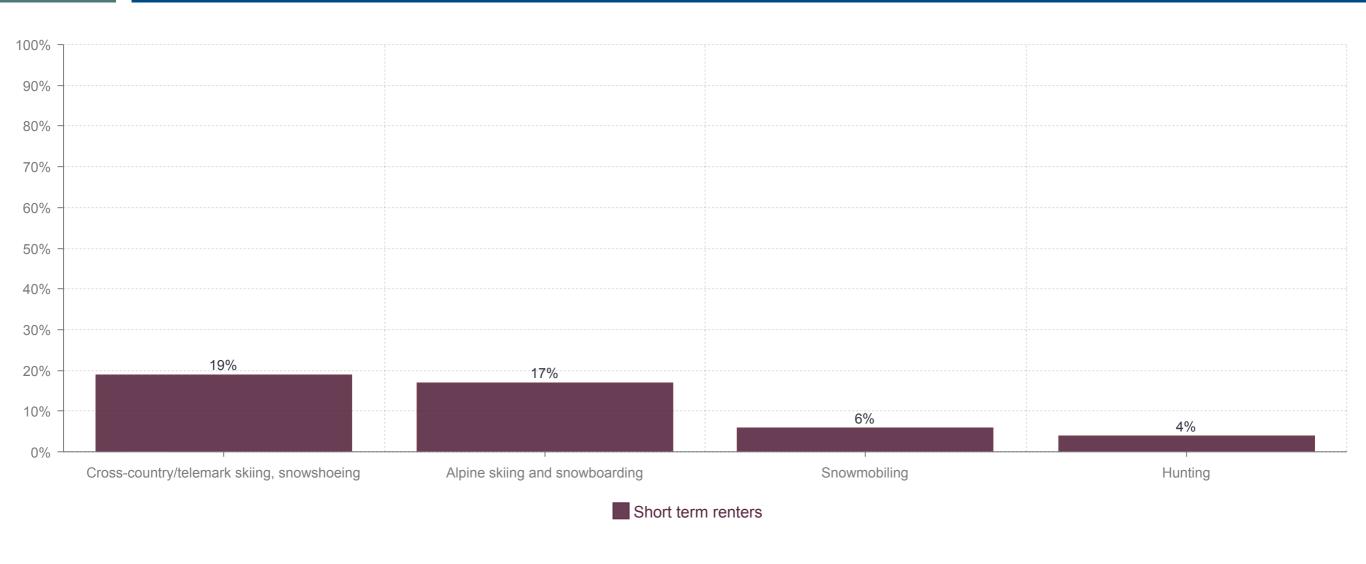
Day trippers





Outdoor Fall/Winter Activities

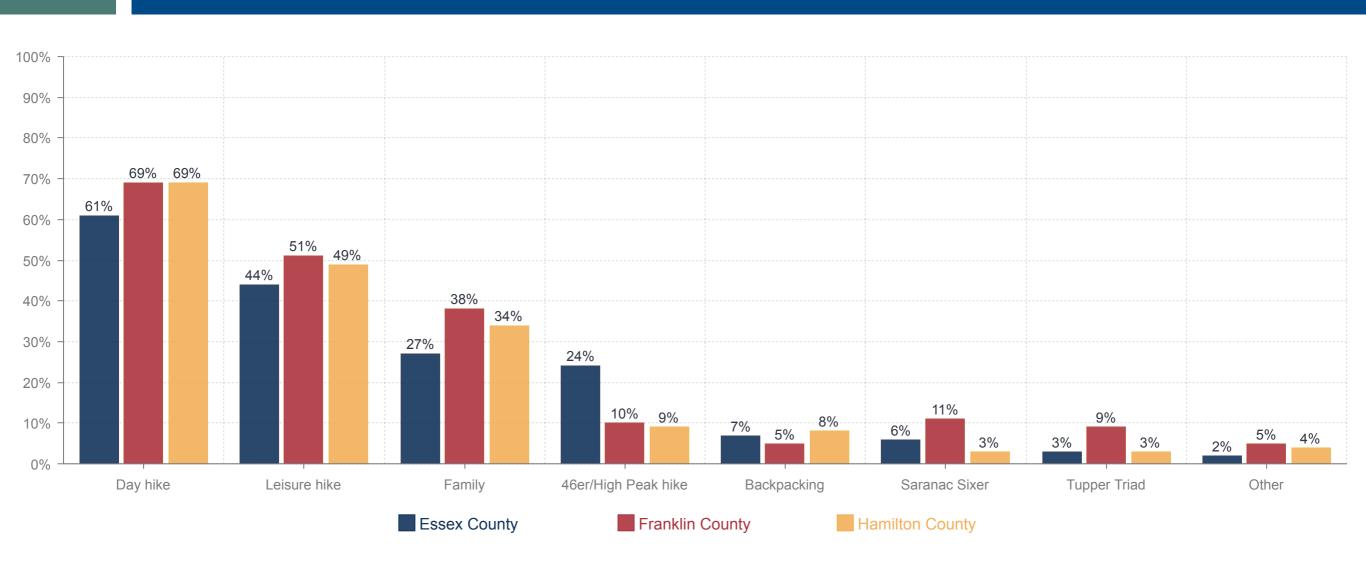
Short term renters





Hiking Breakdown

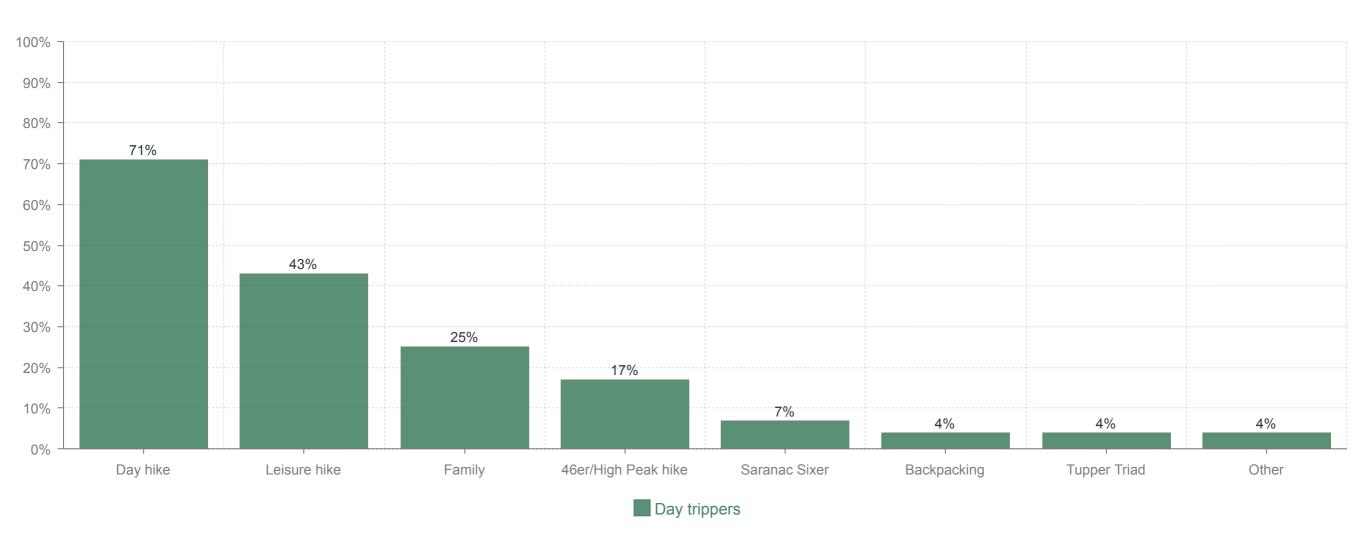
All travelers





Hiking Breakdown

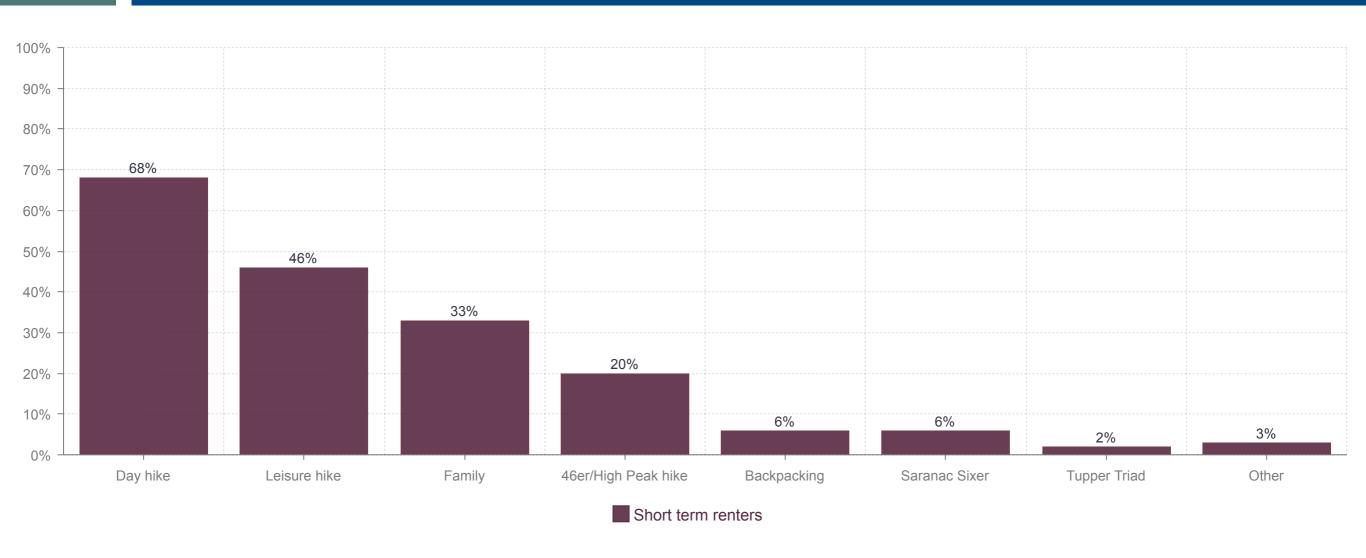
Day trippers





Hiking Breakdown

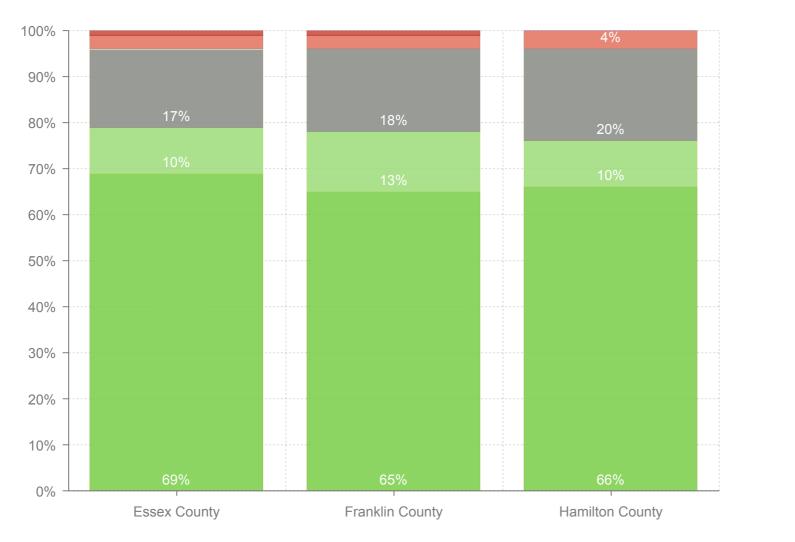
Short term renters





Conversion Rate from Viewing ROOST Marketing Materials

All travelers

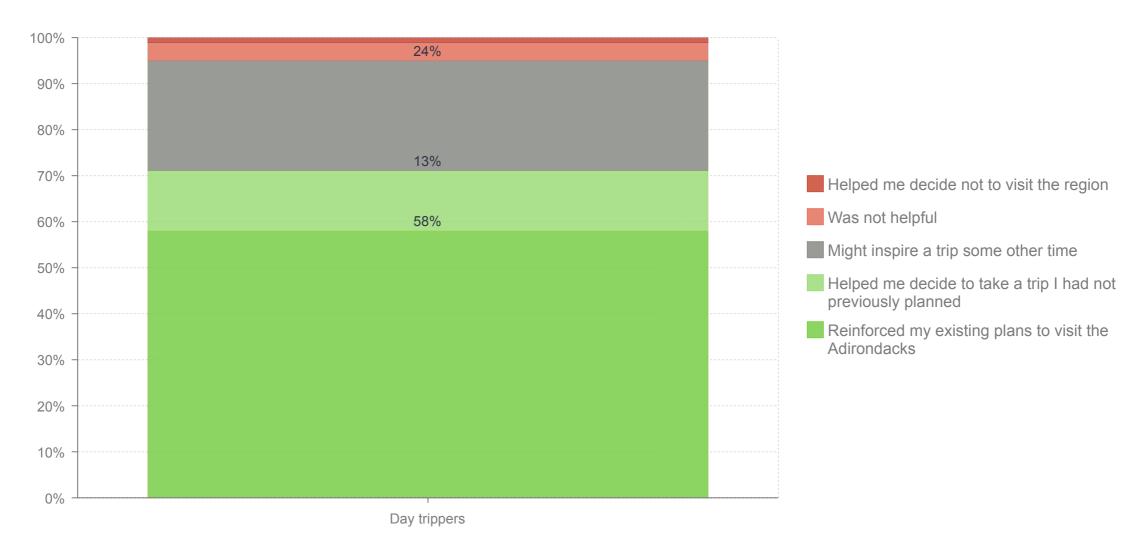


- Helped me decide not to visit the region
- Was not helpful
- Might inspire a trip some other time
- Helped me decide to take a trip I had not previously planned
- Reinforced my existing plans to visit the Adirondacks



Conversion Rate from Viewing ROOST Marketing Materials

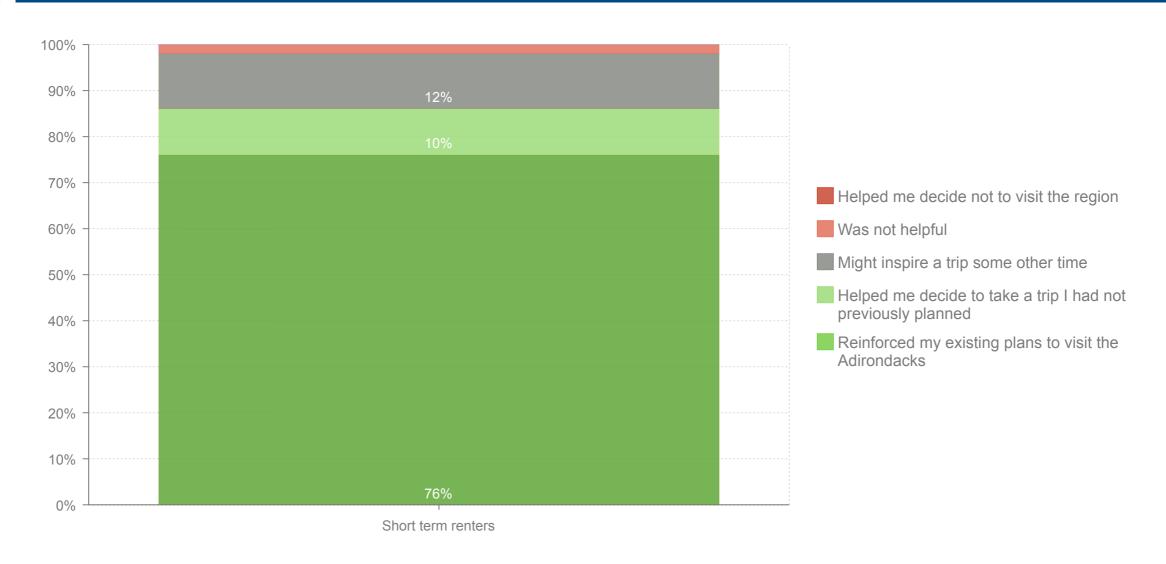
Day trippers





Conversion Rate from Viewing ROOST Marketing Materials

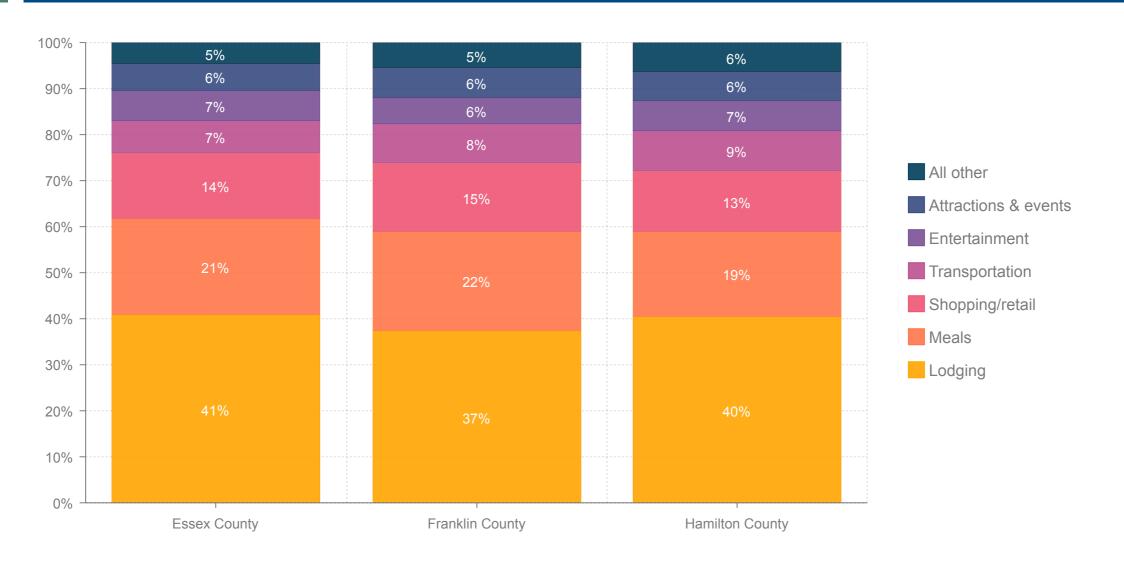
Short term renters





Total Expenditure Allocation by Category

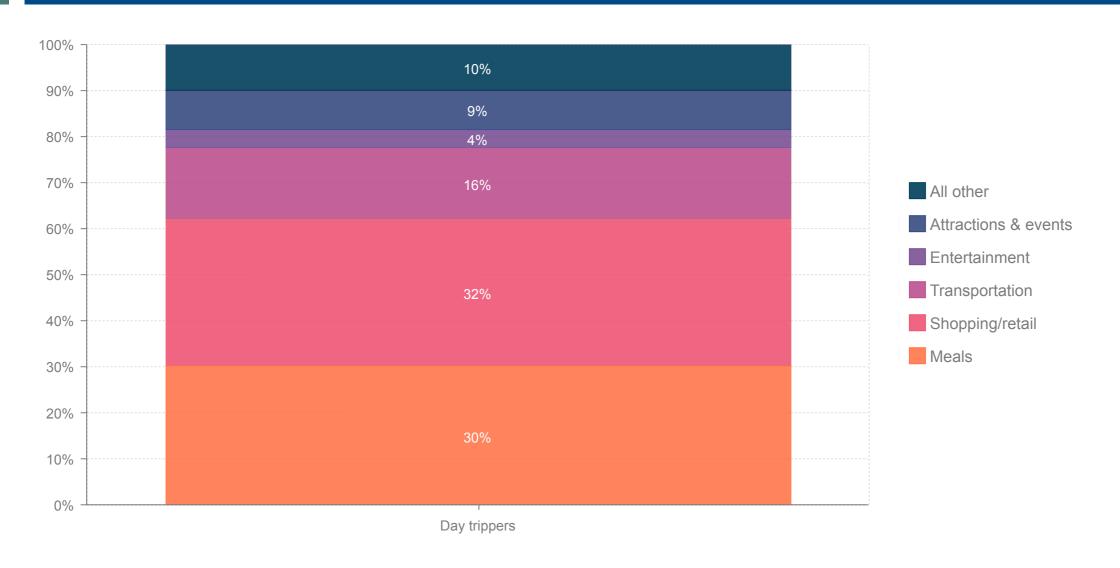
All travelers





Total Expenditure Allocation by Category

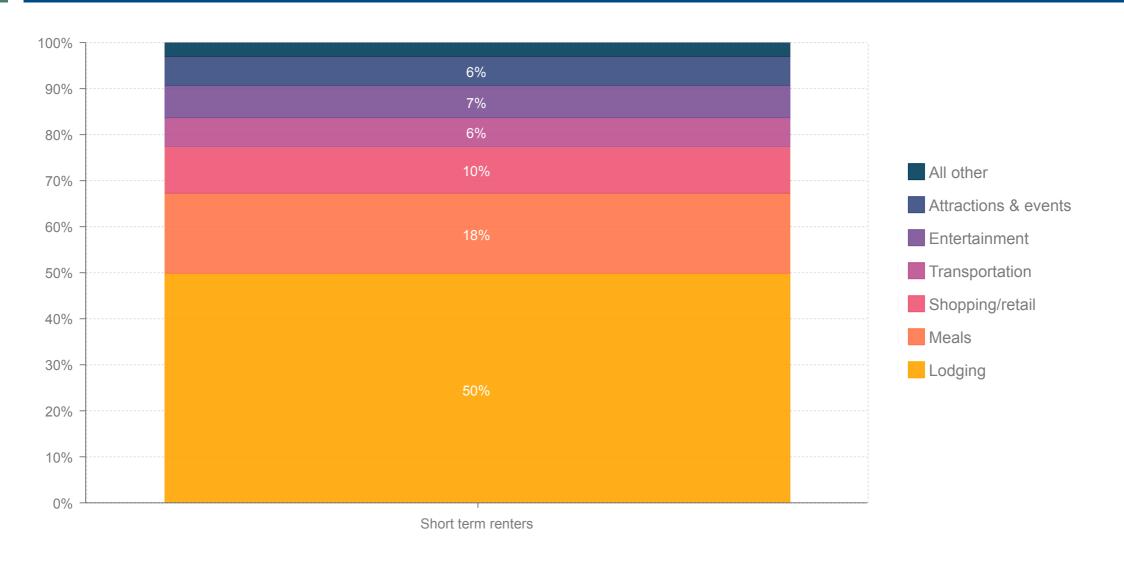
Day trippers





Total Expenditure Allocation by Category

Short term renters





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

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

Mean Party Expenditures

Day trippers

	Day trippers
Lodging	\$0
Meals	\$70
Shopping/retail	\$36
Transportation	\$74
Entertainment	\$9
Attractions & events	\$20
All other	\$23
Average daily expenditure	\$232
Average total expenditure	\$232



Mean Party Expenditures

Short term renters

	Short term renters
Lodging	\$241
Meals	\$85
Shopping/retail	\$50
Transportation	\$30
Entertainment	\$34
Attractions & events	\$31
All other	\$14
Average daily expenditure	\$485
Average total expenditure	\$2,329



Essex County Visitor Profile



- 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



- 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



- "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%)



- 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%



- 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



Franklin County Visitor Profile



- Average traveler party age of respondents was 58 years old; slightly older than the reported ages of the prior two years (54 and 56)
- Mean annual reported household income of travelers was \$95,220, an 8% increase over the 2017 reported mean income of \$87,717
- Average reported total traveler party size was 4.6 persons, including an average of 3.2 adults and 1.4 child. Both adult composition and the child composition grew from the prior reported year (3 and 1 respectively)
- Average stay reported by 2018 travelers was 3.7 nights, continuing the longer stays than reported from 3.4 in 2017 and 3.1 nights in 2016



- 36% travelers reported staying at camping destinations in 2018, followed by hotel/motel/resort at 27%
- 16% reported staying with family and friends, 10% renting private homes and 9% staying in their second homes
- Outdoor activities remained, by a substantial margin, the largest draw to the area with 79% of respondents indicating this interest
- "Relaxing, dining and shopping" (53%) was the second most frequently reported draw to visit the region, followed by sightseeing (51%). Visiting friends (39%), followed by events (19%), and visiting heritage/Olympic sites (tied at 18%) were reported as the next most common attractions



- Hiking remained the most popular reported outdoor activity, with 85% of respondents who reported seeking outdoor activities indicating interest. This was a noticeable jump in level of interest from 2017 visitors (75%)
- The following outdoor activity interests were also selected as next most popular (in descending order): canoeing/kayaking, fishing, boating, cross-country skiing/snowshoeing, birding and skiing/riding
- Respondents expressed interest in canoeing/kayaking and fishing jumped considerably in 2018 from 2017 reported interest, and fell in skiing/riding and boating



- Average daily traveler party spending in 2018 is estimated at \$246 per day, which is lower than the 2017 level (\$271). Length of stay was slightly longer at 3.7 nights (2017 was 3.4). The total estimated trip expenditure is \$911
- Average reported lodging, shopping and meal expenditures all increased, however the other three categories decreased for an overall small decline.
 Shopping demonstrated a notable 35% gain in average expenditures from prior year
- 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 78%. This is a significant increase from 2017 reported conversion of 74%



Hamilton County Visitor Profile



- Average traveler party age of respondents was 56 years old; slightly older than the reported age of 53 in 2017
- Average reported total traveler party size was 4.3 persons, including an average of 3.2 adults and 1.1 child, a slight increase over 2017 reported party size (4.1)
- Average stay reported by 2018 travelers was 3 nights, consistent with the length stay reported in prior year
- Snowmobiling is a notable interest in Hamilton County in comparison with the region. Nearly double the proportion of Hamilton County respondents (13% vs. 7% of all regional respondents) indicated that snowmobiling is an activity that draws them to the area.



- Peak summer months and early fall (July/August and September/October)
 continue to dominate reported visitation (66%) of reported annual visits.
 Seasonality of visitation was consistent, although spring/early summer visits
 (March-June) dropped somewhat from the prior year (to 19% from 22% in 2017)
- Private home rentals (16%), staying with family and friends (12%) and second homes (11%) were the next most commonly selected accommodation choices
- The proportion of respondents who stayed with family and friends dropped slightly in this year's survey, from the prior year at 14%
- Outdoor activities remained, by a substantial margin, the largest draw to the area with 80% of respondents indicating interest



- "Relaxing, dining and shopping" (60%) remained the second most frequently reported draw to visit the region, followed by sightseeing (55%), visiting friends (20%), followed by visiting heritage sites (14%) were reported as the next most common attractions
- Hiking remained the most popular reported outdoor activity among all survey respondents, with 87% of respondents who reported seeking outdoor activities indicating interest in this activity
- The following outdoor activity interests were also selected as popular activities of interest (in descending order): canoeing/kayaking, fishing, boating, and cross-country skiing/snowshoeing and birding (tied). Expressed interest in skiing/boarding among 2018 visitors dropped somewhat and expressed interest in birding rose from 2017

- Average daily traveler party spending in 2018 is estimated at \$312 per day, slightly lower than 2017 level (\$309). Length of stay was consistent at 3 nights between both years. The total estimated trip expenditure is \$934, a 9% decrease from 2017 travelers total reported spending
- Lodging, shopping and "other" categories showed declines in total reported spending, while meals increased notably and other categories stayed fairly consistent
- 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 76%; this is a slight drop from
 the reported conversion rate of 2017 travelers



Day Tripper Visitor Profile



Day trippers

- Regional data were cross-tabulated to analyze results for travelers who noted that they did not have an overnight stay in their visit
- Mean age of day trip travelers was slightly higher at 56 than the mean age of all regional travelers (55)
- Average household income of day travelers within the survey is 18% lower than among the full regional group; an even greater disparity than found among 2017 visitors (which was 12% lower)
- Average day trip traveler party size is 3.4 persons, a notable difference from 3.1 persons for all travelers



Day trippers

- Day trip respondents show an average of only 0.8 child per party vs. 1.1 child per party of all travelers
- Overall expenditures, not surprisingly are much lower among this group of travelers, with a total average reported expenditure of \$232 (versus \$1,070 total average trip or \$358 per day among all regional travelers)
- Daily expenditures in all categories are much lower among day travelers on average than those who stay overnight
- Several attractions are reportedly of less interest to day trip travelers than among all travelers, including: outdoor activities, relaxing/shopping/dining and visiting friends



Day trippers

- Sightseeing, events and arts/entertainment were reported at a higher interest level than among day trip travelers, suggesting that scenic drives and specific activities are one of the most popular activities among this group
- Day trip travelers showed substantially less interest in hiking than the full group of visitors, but a comparatively higher interest in skiing/boarding, cross-country skiing/snowshoeing and skiing/boarding



Short Term Renter Visitor Profile



Short term renters

- Regional data were cross-tabulated to analyze the traveler characteristics of those who indicated that they stayed in private homes, termed "short-term rentals" in this report
- Average age of short-term renters is younger than the full regional group at 53 years (versus 55)
- Mean annual reported income is higher among this group, at \$109,756 (versus \$100,455 among the full regional sample)
- Average short-term renter traveler party size is 6.1 persons versus 4.1 persons for the whole region. This is a significant difference, as is the difference in reported average number of children per party (1.1 in the region, versus 1.9 for private home travelers)

adirondacks, usa

Short term renters

- Overall expenditures among this group were more than double that of the regional traveler and 26% higher per day
- Total trip expenditures of short-term renters were \$2,329 and \$485 daily; these figures climbed substantially from 2017 travelers
- All categories showed higher expenditure levels among short-term renters, however lodging accounted for the majority of this figure (\$1,159 among short term renters on average versus \$429 on average among all regional travelers)
- Average reported length of stay is 4.8 nights for short- term renters, 60% higher than the average of 3 nights for all regional travelers and increasing 0.4 day from the prior year measure



Short term renters

- A slightly higher proportion of stays are noted among short-term renters (42% vs. 36% of stays regionally) in peak summer months of July/August and slightly lower in early summer of May/June than among the regional group (13% vs. 19%)
- Outdoor activities and relaxing are an even higher reported interest among short- term renters (by 87% and 62% respectively) than among the full regional group (by 74% and 58% respectively)
- Hiking, canoeing, fishing and boating all have higher levels of expressed interest among the short term rental group than among all regional travelers surveyed



Short term renters

- Short-term renters are a slightly more ethnically diverse group (93% White vs. 96% among all traveler groups)
- While this group presents some challenges to traditional tourism markets, there
 are a number of positive characteristics to this growing market including the
 longer lengths of stay, higher spending levels and average affluence, strong
 component of families and greater diversity





- Average traveler party age of respondents was 55 years old and the mean annual reported household income of travelers was \$100,455. Average age was slightly higher than reported in 2017 (53) and reported income increased nearly 8%
- Average reported total traveler party size was 4.1 persons, including an average of 3 adults and 1.1 children, slightly higher than the 4 persons reported by 2017 travelers
- Peak summer months (July/August at 36%) and early fall (September/October at 21%) continue to dominate with more than half of reported annual visits
- May/June is a strong season for visitation regionally with 19% of reported visits and spring season of March-April adds 7% of travelers



- Winter season, from November to February, comprises 18% of annual visits; the proportion of visits per season is consistent with the prior year
- Hotels/motels are the most popular lodging choice among 2018 traveler respondents (44%), followed by camping options (19%), staying with family and friends and renting private homes (13%) and staying in second homes (9%)
- Most figures are generally consistent with recent years' data, although a slight drop of those staying with family and friends was seen from the prior year
- Outdoor activities were the largest draw to the area with 74% of respondents selecting this attraction, although this figure dropped considerably from recent years



- Relaxing, dining and shopping was the second most frequently reported draw to visit the region (58%), followed by sightseeing (50%), visiting friends (28%), Olympic sites (22%), heritage sites (16%) and events (15%) strength of outdoor activities, visiting friends and events as a draw to visit the area all declined measurably among 2018 travelers
- Hiking remained the most popular reported outdoor activity among all survey respondents with 77% of respondents who reported seeking outdoor activities indicating interest in this activity
- The following outdoor activity interests were also selected as popular activities of interest (in descending order): canoeing/kayaking (52%), fishing (28%), boating (23%), cross country skiing/snowshoeing (17%) and skiing/riding (16%)



- The average daily traveler party spending in 2018 is estimated at \$358 per day, or a total of \$1,070 reported per trip, representing a 9% increase over reported 2017 spending
- 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 77%
- A number of positive attributes are seen regionally among 2018 visitors including a higher average income and higher expenditures in most spending categories, especially lodging and shopping



Regional ROI Study



Return on Investment (ROI)

- More than 300,000 (313,673) potential travelers inquired about visiting the region in 2018 through ROOST's various outlets and left contact information which provides unique identity increase of just over 2,000 from the 2017 level of traceable traveler leads
- 2018 estimated traveler count is tabulated by multiplying the number of traceable leads generated by ROOST by the conversion factor and by the average party size (as determined by the survey)
- Estimated number of travelers influenced by ROOST to travel to the region in 2018 is approximately 990,000, up over 2% from estimated 2017 visitation from the same method



Return on Investment (ROI)

All travelers

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

```
    313,673 (number of direct, traceable inquiries)
    x 77% (gross conversion factor)
    x $358 (mean traveler party expenditure per day)
    x 3 (mean length of stay in nights)
```

• Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2018 is \$259,401,298



Return on Investment (ROI)

All travelers

• The estimated total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials is calculated by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures and length of stay:

```
$259,401,298 (total estimated traveler revenue)

÷ $4,444,201 (total ROOST marketing expenditures)
```

• This produces a conservatively-estimated ROI of **58:1** in leisure traveler-related revenue for every marketing dollar expended

