Leisure Travel Study
Essex, Franklin, and Hamilton County Region

2018 County Visitor Profiles and Regional Return on Marketing Investment Analysis

May 2019
Project Background & Methodology

- 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 by DMA
Essex County travelers

Albany-Schenectady-Troy NY 24.5%
New York NY 18.6%
Burlington VT-Plattsburgh NY 8.4%
Syracuse NY 7.6%
Rochester NY 5.7%
Watertown NY 5.1%
Ontario 3.9%
Philadelphia PA 3.4%
Buffalo NY 3.3%
Quebec 2.9%
Utica NY 2.6%
Hartford & New Haven CT 1.9%
Boston MA-Manchester NH 1.7%
Binghamton NY 1.7%
Washington DC (Hagerstown MD) 0.6%
Area of Residence by DMA

Hamilton County travelers

- Albany-Schenectady-Troy NY
- Syracuse NY
- New York NY
- Utica NY
- Rochester NY
- Burlington VT-Plattsburgh NY
- Watertown NY
- Buffalo NY
- Binghamton NY
- Philadelphia PA
- Boston MA-Manchester NH
- Ontario
- Wilkes Barre-Scranton PA
- Washington DC (Hagerstown MD)
- Elmira (Corning) NY
- Harrisburg-Lancaster-Lycoming PA

0% 5% 10% 15% 20% 25%
Ethnicity

Day trippers

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian</td>
<td>95.7%</td>
</tr>
<tr>
<td>American Indian or Alaskan Native</td>
<td>1.1%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>0.5%</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td>0.2%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>0.2%</td>
</tr>
<tr>
<td>Multiple ethnicity/Other</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

Day trippers
Ethnicity
Short term renters

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian</td>
<td>92.7%</td>
</tr>
<tr>
<td>American Indian or Alaskan Native</td>
<td>1.2%</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td>1.1%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>0.8%</td>
</tr>
<tr>
<td>Black or African American</td>
<td>0.3%</td>
</tr>
<tr>
<td>Multiple ethnicity/Other</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

Short term renters
Average Age

All travelers

<table>
<thead>
<tr>
<th>Average Age</th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>All travelers</td>
<td>54</td>
<td>56</td>
<td>56</td>
</tr>
<tr>
<td>Average visitor age</td>
<td>40</td>
<td>42</td>
<td>44</td>
</tr>
</tbody>
</table>
Five Year Average Age*

Essex County travelers

*2015 study not conducted
Average Age

Day trippers

Average visitor age

Day trippers
Average Age

Short term renters

Average visitor age

- 40
- 42
- 44
- 46
- 48
- 50
- 52
- 54
- 56
- 58
- 60

Short term renters
Average Income

All travelers

- Essex County: $107,065
- Franklin County: $95,220
- Hamilton County: $92,830
Average Income

Day trippers

Income

$88,376
Average Income

Short term renters

Income

$109,756

Short term renters

$70,000

$75,000

$80,000

$85,000

$90,000

$95,000

$100,000

$105,000

$110,000

$115,000

$120,000
Five Year Average Party Size / Length of Stay*

Essex County travelers

*2015 study not conducted
Party Size / Length of Stay

Day trippers

- Party size: 3.4
- Length of stay: 0.0
Party Size / Length of Stay
Short term renters

- Party size: 6.1
- Length of stay: 4.8

Short term renters
Party Composition

All travelers

<table>
<thead>
<tr>
<th>County</th>
<th>Children</th>
<th>Adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essex County</td>
<td>1.0</td>
<td>2.9</td>
</tr>
<tr>
<td>Franklin County</td>
<td>1.4</td>
<td>3.2</td>
</tr>
<tr>
<td>Hamilton County</td>
<td>1.1</td>
<td>3.2</td>
</tr>
</tbody>
</table>
Five Year Average Party Composition

Essex County travelers

*2015 study not conducted
Party Composition

Day trippers

- Adults: 2.6
- Children: 0.8
Party Composition

Short term renters

![Chart showing the distribution of adults and children among short term renters. Adults account for 4.2 units, while children account for 1.9 units.]
Time of Year Visited

All travelers

<table>
<thead>
<tr>
<th>Time of Year</th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>January - February</td>
<td>13%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>March - April</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>May - June</td>
<td>19%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>July - August</td>
<td>30%</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>September - October</td>
<td>21%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>November - December</td>
<td>9%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Essex County Franklin County Hamilton County

Legend:
- **Red**: January - February
- **Brown**: March - April
- **Orange**: May - June
- **Yellow**: July - August
- **Light Green**: September - October
- **Green**: November - December
## Time of Year Visited

### Day trippers

<table>
<thead>
<tr>
<th>Month Pair</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>January - February</td>
<td>19%</td>
</tr>
<tr>
<td>March - April</td>
<td>6%</td>
</tr>
<tr>
<td>May - June</td>
<td>22%</td>
</tr>
<tr>
<td>July - August</td>
<td>38%</td>
</tr>
<tr>
<td>September - October</td>
<td>7%</td>
</tr>
<tr>
<td>November - December</td>
<td>8%</td>
</tr>
</tbody>
</table>
Time of Year Visited

Short term renters

- January - February: 11%
- March - April: 5%
- May - June: 13%
- July - August: 42%
- September - October: 21%
- November - December: 8%
Lodging Accommodations
All travelers

- Hotel/motel/resort: 55%
- Family/friends: 12%
- Private rental (Airbnb, AdkByOwner, etc.): 13%
- Second home: 6%
- Bed and breakfast: 3%
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.): 36%
- Lodging by type of accommodation:
  - Essex County: 27%
  - Franklin County: 11%
  - Hamilton County: 12%

Location:
- Essex County
- Franklin County
- Hamilton County

Source: 2018 Leisure Travel Study
Lodging Accommodations
Essex County travelers

- Hotel/motel/resort: 55%
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.): 13%
- Family/friends: 12%
- Private rental (Airbnb, AdkByOwner, etc.): 11%
- Second home: 6%
- Bed and breakfast: 3%
Lodging Accommodations
Franklin County travelers

- Hotel/motel/resort: 27%
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.): 36%
- Family/friends: 16%
- Private rental (Airbnb, AdkByOwner, etc.): 9%
- Second home: 10%
- Bed and breakfast: 2%
Lodging Accommodations
Hamilton County travelers

- Hotel/motel/resort: 31%
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.): 28%
- Family/friends: 16%
- Private rental (Airbnb, AdkByOwner, etc.): 12%
- Second home: 11%
- Bed and breakfast: 2%
Method of Booking Lodging Reservation

All travelers

- **Phone reservation**: 21% Essex County, 21% Franklin County, 22% Hamilton County
- **Hotel online reservation system**: 22% Essex County, 8% Franklin County, 11% Hamilton County
- **Expedia, Priceline, Hotel.com, Kayak, Travelocity, Bookings.com, etc.**: 11% Essex County, 4% Franklin County, 4% Hamilton County
- **Destination website (LakePlacid.com, SaranacLake.com, AdironacksUSA.com, etc.)**: 5% Essex County, 8% Franklin County, 4% Hamilton County
- **ADK by Owner**: 3% Essex County, 3% Franklin County, 7% Hamilton County
- **VRBO (Vacation Rental by Owner)**: 3% Essex County, 2% Franklin County, 3% Hamilton County
- **Airbnb**: 3% Essex County, 2% Franklin County, 4% Hamilton County
- **Other**: 29% Essex County, 52% Franklin County, 45% Hamilton County
Key Attractions

All travelers

Outdoor activities: 79% (Essex County), 80% (Franklin County), 74% (Hamilton County)
Relaxing, shopping, dining: 60% (Essex County), 53% (Franklin County), 60% (Hamilton County)
Sightseeing and touring: 48% (Essex County), 51% (Franklin County), 55% (Hamilton County)
Visiting friends or relatives: 28% (Essex County), 30% (Franklin County), 29% (Hamilton County)
Olympic sites: 29% (Essex County), 39% (Franklin County), 30% (Hamilton County)
Heritage and culture: 18% (Essex County), 13% (Franklin County), 14% (Hamilton County)
Events: 18% (Essex County), 19% (Franklin County), 20% (Hamilton County)
Sports: 18% (Essex County), 19% (Franklin County), 20% (Hamilton County)
Arts and entertainment: 18% (Essex County), 14% (Franklin County), 15% (Hamilton County)
Agritourism: 12% (Essex County), 9% (Franklin County), 12% (Hamilton County)
Meetings/conferences: 3% (Essex County), 3% (Franklin County), 3% (Hamilton County)
Weddings, reunions, non-business group gatherings: 8% (Essex County), 7% (Franklin County), 8% (Hamilton County)
Other: 6% (Essex County), 11% (Franklin County), 12% (Hamilton County)
Five Year Key Attractions*
Essex County travelers

*2015 study not conducted

- Outdoor activities
- Relaxing, shopping, dining
- Sightseeing and touring
- Olympic sites
- Visiting friends and relatives
- Events
- Sports
- Heritage and culture
- Arts and entertainment
- Agritourism
- Weddings, reunions, non-business group gatherings
- Meetings/conferences

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor activities</td>
<td>82%</td>
<td>74%</td>
<td>60%</td>
<td>48%</td>
<td>29%</td>
</tr>
<tr>
<td>Relaxing, shopping, dining</td>
<td>74%</td>
<td>63%</td>
<td>48%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>Sightseeing and touring</td>
<td>48%</td>
<td>49%</td>
<td>45%</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>Olympic sites</td>
<td>29%</td>
<td>28%</td>
<td>27%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>32%</td>
<td>25%</td>
<td>24%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Events</td>
<td>28%</td>
<td>25%</td>
<td>24%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Sports</td>
<td>18%</td>
<td>15%</td>
<td>14%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Heritage and culture</td>
<td>28%</td>
<td>21%</td>
<td>19%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Arts and entertainment</td>
<td>26%</td>
<td>21%</td>
<td>19%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Agritourism</td>
<td>8%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Weddings, reunions, non-business group gatherings</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

2018 Leisure Travel Study
Key Attractions

Short term renters

Outdoor activities: 87%
Relaxing, shopping, dining: 62%
Sightseeing and touring: 47%
Visiting friends or relatives: 29%
Olympic sites: 22%
Heritage and culture: 17%
Events: 16%
Sports: 14%
Arts and entertainment: 11%
Agritourism: 8%
Weddings, reunions, non-business group gatherings: 6%
Meetings/conferences: 2%
Other: 6%
Outdoor Spring/Summer Activities

All travelers

<table>
<thead>
<tr>
<th>Activity</th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiking</td>
<td>86%</td>
<td>85%</td>
<td>87%</td>
</tr>
<tr>
<td>Canoeing/kayaking</td>
<td>71%</td>
<td>72%</td>
<td>52%</td>
</tr>
<tr>
<td>Fishing</td>
<td>25%</td>
<td>23%</td>
<td>44%</td>
</tr>
<tr>
<td>Boating</td>
<td>11%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Birding</td>
<td>11%</td>
<td>19%</td>
<td>31%</td>
</tr>
<tr>
<td>Cycling</td>
<td>16%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Golf</td>
<td>12%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Mountain biking</td>
<td>11%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Whitewater rafting</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Hunting</td>
<td>4%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Guided experience</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Rock climbing</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Outdoor Spring/Summer Activities

Day trippers

- Hiking: 87%
- Canoeing/kayaking: 57%
- Fishing: 25%
- Boating: 18%
- Birding: 17%
- Cycling: 11%
- Mountain biking: 8%
- Whitewater rafting: 8%
- Golf: 8%
- Hunting: 5%
- Guided experience: 4%
- Rock climbing: 3%
Outdoor Spring / Summer Activities

Short term renters

- Hiking: 88%
- Canoeing/kayaking: 61%
- Fishing: 32%
- Boating: 30%
- Birding: 17%
- Cycling: 17%
- Golf: 12%
- Mountain biking: 11%
- Whitewater rafting: 8%
- Rock climbing: 5%
- Hunting: 4%
- Guided experience: 4%
Outdoor Fall/Winter Activities

All travelers

<table>
<thead>
<tr>
<th>Activity</th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpine skiing and snowboarding</td>
<td>22%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Cross-country/telemark skiing, snowshoeing</td>
<td>10%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>6%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Hunting</td>
<td>4%</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Outdoor Fall/Winter Activities

Day trippers

- Cross-country/telemark skiing, snowshoeing: 23%
- Alpine skiing and snowboarding: 17%
- Snowmobiling: 8%
- Hunting: 5%
Outdoor Fall/Winter Activities

Short term renters

- Cross-country/telemark skiing, snowshoeing: 19%
- Alpine skiing and snowboarding: 17%
- Snowmobiling: 6%
- Hunting: 4%

Short term renters
Hiking Breakdown
All travelers

Day hike
- Essex County: 61%
- Franklin County: 69%
- Hamilton County: 69%

Leisure hike
- Essex County: 44%
- Franklin County: 51%
- Hamilton County: 49%

Family
- Essex County: 27%
- Franklin County: 38%
- Hamilton County: 34%

46er/High Peak hike
- Essex County: 24%
- Franklin County: 10%
- Hamilton County: 9%

Backpacking
- Essex County: 7%
- Franklin County: 5%
- Hamilton County: 8%

Saranac Sixer
- Essex County: 6%
- Franklin County: 11%
- Hamilton County: 3%

Tupper Triad
- Essex County: 3%
- Franklin County: 9%
- Hamilton County: 3%

Other
- Essex County: 2%
- Franklin County: 5%
- Hamilton County: 4%
Hiking Breakdown

Day trippers

Day hike: 71%
Leisure hike: 43%
Family: 25%
46er/High Peak hike: 17%
Saranac Sixer: 7%
Backpacking: 4%
Tupper Triad: 4%
Other: 4%

Day trippers
Hiking Breakdown

Short term renters

- Day hike: 68%
- Leisure hike: 46%
- Family: 33%
- 46er/High Peak hike: 20%
- Backpacking: 6%
- Saranac Sixer: 6%
- Tupper Triad: 2%
- Other: 3%
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

<table>
<thead>
<tr>
<th>County</th>
<th>Helped me decide not to visit the region</th>
<th>Was not helpful</th>
<th>Might inspire a trip some other time</th>
<th>Helped me decide to take a trip I had not previously planned</th>
<th>Reinforced my existing plans to visit the Adirondacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essex County</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
<td>69%</td>
<td>17%</td>
</tr>
<tr>
<td>Franklin County</td>
<td>18%</td>
<td>13%</td>
<td>10%</td>
<td>65%</td>
<td>18%</td>
</tr>
<tr>
<td>Hamilton County</td>
<td>4%</td>
<td>10%</td>
<td>10%</td>
<td>66%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers

- Helped me decide not to visit the region: 24%
- Was not helpful: 13%
- Might inspire a trip some other time: 58%
- Helped me decide to take a trip I had not previously planned: 0%
- Reinforced my existing plans to visit the Adirondacks: 0%

Day trippers
Conversion Rate from Viewing ROOST Marketing Materials

Short term renters

- **76%** reinforced my existing plans to visit the Adirondacks
- **10%** helped me decide to take a trip I had not previously planned
- **12%** might inspire a trip some other time
- **10%** was not helpful
- **0%** helped me decide not to visit the region

2018 Leisure Travel Study

Regional Office of Sustainable Tourism

Adirondacks, USA
Total Expenditure Allocation by Category

All travelers

<table>
<thead>
<tr>
<th>Category</th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractions &amp; events</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Transportation</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Shopping/retail</td>
<td>14%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Meals</td>
<td>21%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Lodging</td>
<td>41%</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>All other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Legend:
- All other
- Attractions & events
- Entertainment
- Transportation
- Shopping/retail
- Meals
- Lodging
Total Expenditure Allocation by Category
Day trippers

- Meals: 30%
- Shopping/retail: 32%
- Transportation: 16%
- Attractions & events: 9%
- Entertainment: 4%
- All other: 10%

2018 Leisure Travel Study
Total Expenditure Allocation by Category

Short term renters

- Lodging: 50%
- Meals: 18%
- Shopping/retail: 10%
- Transportation: 6%
- Attractions & events: 7%
- Entertainment: 6%
- All other: 10%
### Mean Party Expenditures

**All travelers**

<table>
<thead>
<tr>
<th></th>
<th>Essex County</th>
<th>Franklin County</th>
<th>Hamilton County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$168</td>
<td>$92</td>
<td>$126</td>
</tr>
<tr>
<td>Meals</td>
<td>$86</td>
<td>$53</td>
<td>$58</td>
</tr>
<tr>
<td>Shopping/retail</td>
<td>$60</td>
<td>$37</td>
<td>$41</td>
</tr>
<tr>
<td>Transportation</td>
<td>$29</td>
<td>$21</td>
<td>$27</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$28</td>
<td>$14</td>
<td>$20</td>
</tr>
<tr>
<td>Attractions &amp; events</td>
<td>$25</td>
<td>$16</td>
<td>$20</td>
</tr>
<tr>
<td>All other</td>
<td>$19</td>
<td>$13</td>
<td>$20</td>
</tr>
<tr>
<td>Average daily expenditure</td>
<td>$415</td>
<td>$246</td>
<td>$312</td>
</tr>
<tr>
<td>Average total expenditure</td>
<td>$1,151</td>
<td>$911</td>
<td>$934</td>
</tr>
</tbody>
</table>
## Five Year Mean Party Expenditures

**Essex County travelers**

<table>
<thead>
<tr>
<th>Category</th>
<th>Five year average</th>
<th>2018</th>
<th>2017</th>
<th>2016</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractions &amp; events</td>
<td>$76</td>
<td>$68</td>
<td>$57</td>
<td>$78</td>
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<td>Entertainment</td>
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<td>$76</td>
<td>$59</td>
<td>$76</td>
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<td>Transportation</td>
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<td>$92</td>
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<tr>
<td>Lodging</td>
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<td>$470</td>
<td>$447</td>
<td>$433</td>
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<td>$705</td>
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<tr>
<td>Meals</td>
<td>$252</td>
<td>$241</td>
<td>$198</td>
<td>$226</td>
<td>$244</td>
<td>$353</td>
</tr>
<tr>
<td>Shopping/retail</td>
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<td>$164</td>
<td>$95</td>
<td>$146</td>
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<tr>
<td>All other</td>
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<td>$52</td>
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<td>$110</td>
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<tr>
<td>Average daily expenditure</td>
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<td>$415</td>
<td>$340</td>
<td>$387</td>
<td>$338</td>
<td>$323</td>
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<tr>
<td>Average total expenditure</td>
<td>$1,246</td>
<td>$1,151</td>
<td>$948</td>
<td>$1,161</td>
<td>$1,329</td>
<td>$1,646</td>
</tr>
</tbody>
</table>

*2015 study not conducted*
Mean Party Expenditures

Day trippers

<table>
<thead>
<tr>
<th></th>
<th>Day trippers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$0</td>
</tr>
<tr>
<td>Meals</td>
<td>$70</td>
</tr>
<tr>
<td>Shopping/retail</td>
<td>$36</td>
</tr>
<tr>
<td>Transportation</td>
<td>$74</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$9</td>
</tr>
<tr>
<td>Attractions &amp; events</td>
<td>$20</td>
</tr>
<tr>
<td>All other</td>
<td>$23</td>
</tr>
<tr>
<td>Average daily expenditure</td>
<td>$232</td>
</tr>
<tr>
<td>Average total expenditure</td>
<td>$232</td>
</tr>
</tbody>
</table>
# Mean Party Expenditures

**Short term renters**

<table>
<thead>
<tr>
<th>Category</th>
<th>EXPENDITURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$241</td>
</tr>
<tr>
<td>Meals</td>
<td>$85</td>
</tr>
<tr>
<td>Shopping/retail</td>
<td>$50</td>
</tr>
<tr>
<td>Transportation</td>
<td>$30</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$34</td>
</tr>
<tr>
<td>Attractions &amp; events</td>
<td>$31</td>
</tr>
<tr>
<td>All other</td>
<td>$14</td>
</tr>
<tr>
<td>Average daily expenditure</td>
<td>$485</td>
</tr>
<tr>
<td>Average total expenditure</td>
<td>$2,329</td>
</tr>
</tbody>
</table>
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
Visitor Profile
All Franklin County travelers

- 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
Visitor Profile
All Franklin County travelers

- 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
Visitor Profile
All Franklin County travelers

- 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
Visitor Profile
All Franklin County travelers

- 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%.
Visitor Profile
All Hamilton County travelers

- 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.
Visitor Profile
All Hamilton County travelers

- 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.
Regional Office of Sustainable Tourism

Day Tripper Visitor Profile

ROOST
Regional Office of Sustainable Tourism
Adirondacks, USA
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.
Visitor Profile
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
Visitor Profile
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.
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)
Visitor Profile

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.
Visitor Profile

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
Visitor Profile
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
Regional Visitor Impacts
Regional Visitor Impacts

All travelers

- 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
Regional Visitor Impacts

All 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.

2018 Leisure Travel Study

adirondacks, usa
Regional Visitor Impacts

All travelers

- 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%).
Regional Visitor Impacts
All travelers

* 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.
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:

\[ \text{313,673 (number of direct, traceable inquiries)} \times 77\% \ (\text{gross conversion factor}) \times \$358 \ (\text{mean traveler party expenditure per day}) \times 3 \ (\text{mean length of stay in nights}) \]

• 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:

\[
\frac{\$259,401,298 \text{ (total estimated traveler revenue)}}{\$4,444,201 \text{ (total ROOST marketing expenditures)}}
\]

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