

Leisure Travel Study

Essex, Franklin, and Hamilton County Region

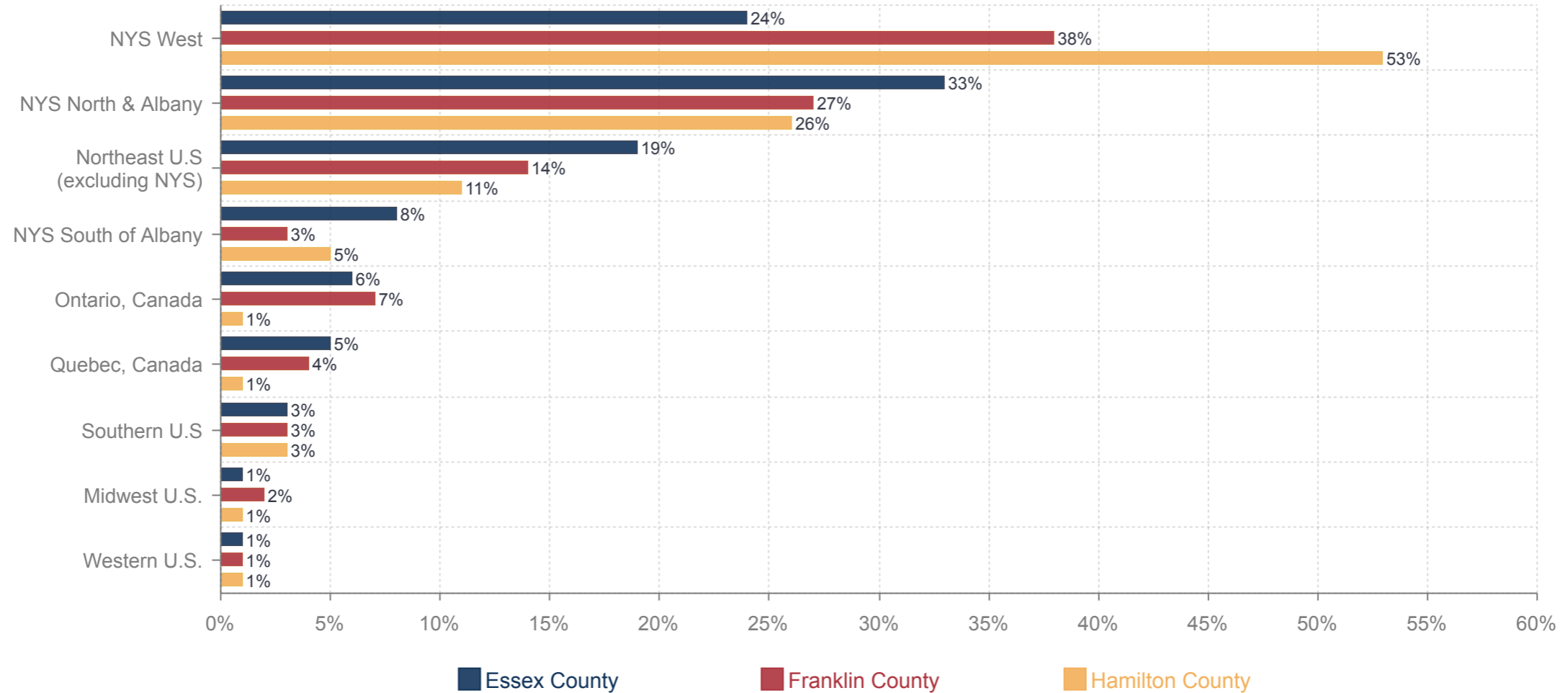
2019 Essex County Visitor Focus

Oct 2020

ROOST

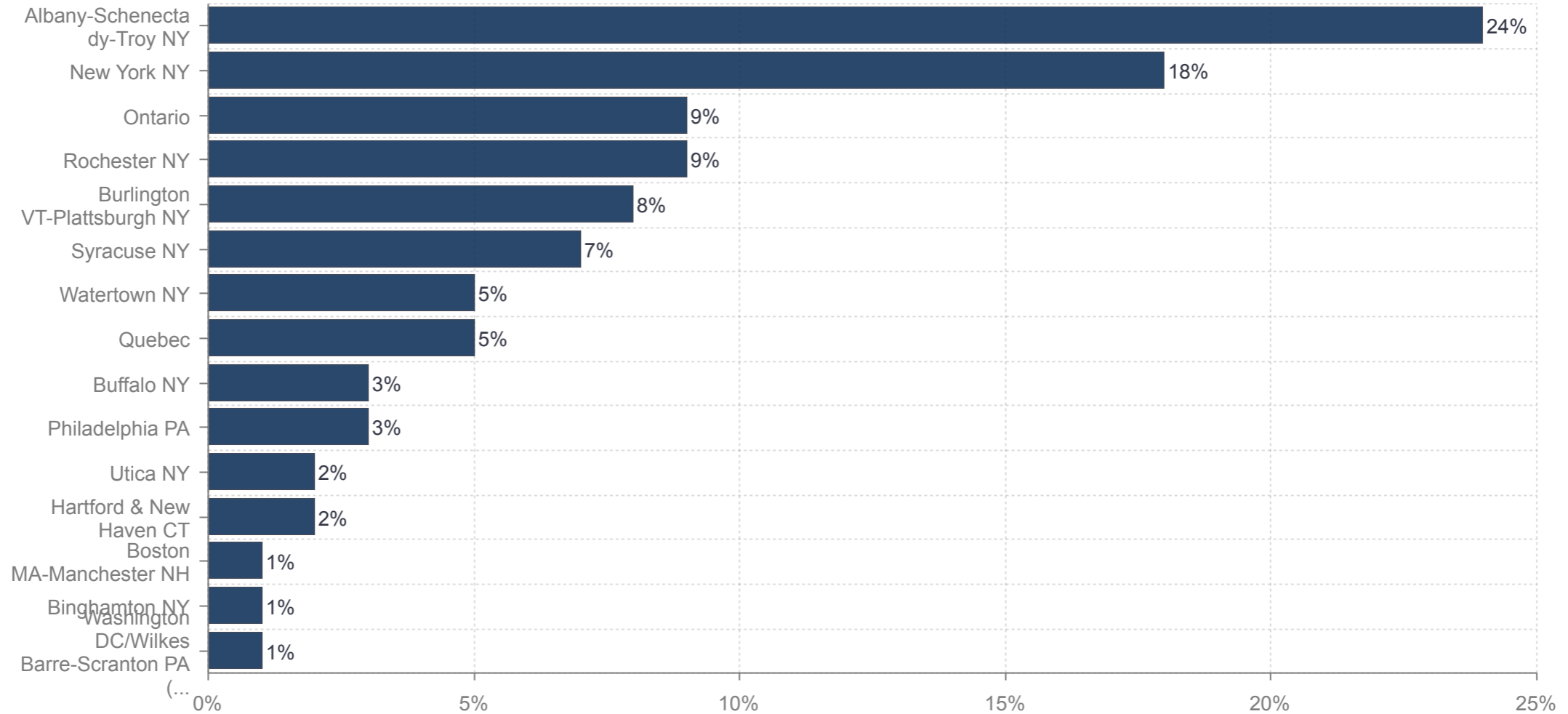
Area of Residence

All travelers



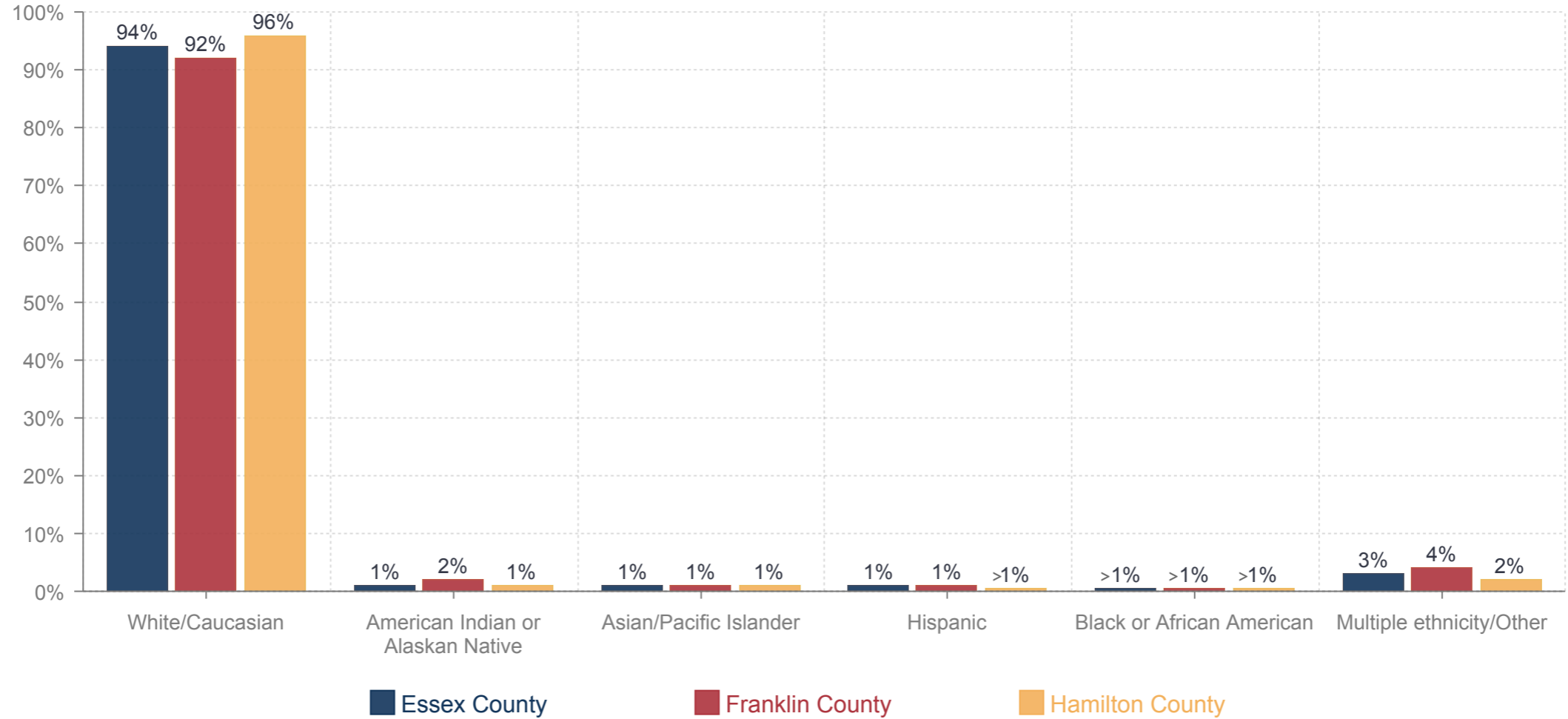
Area of Residence by DMA

Essex County travelers



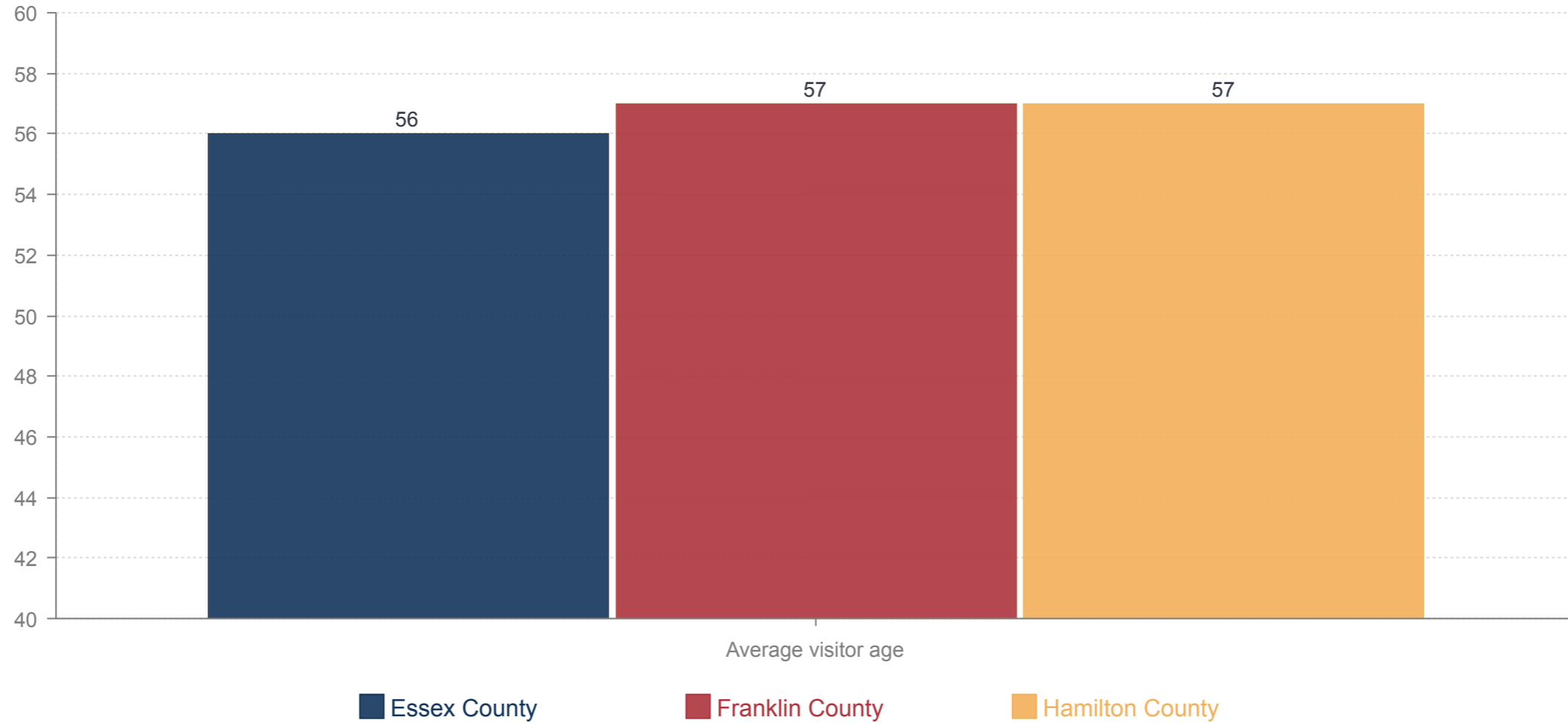
Ethnicity

All travelers



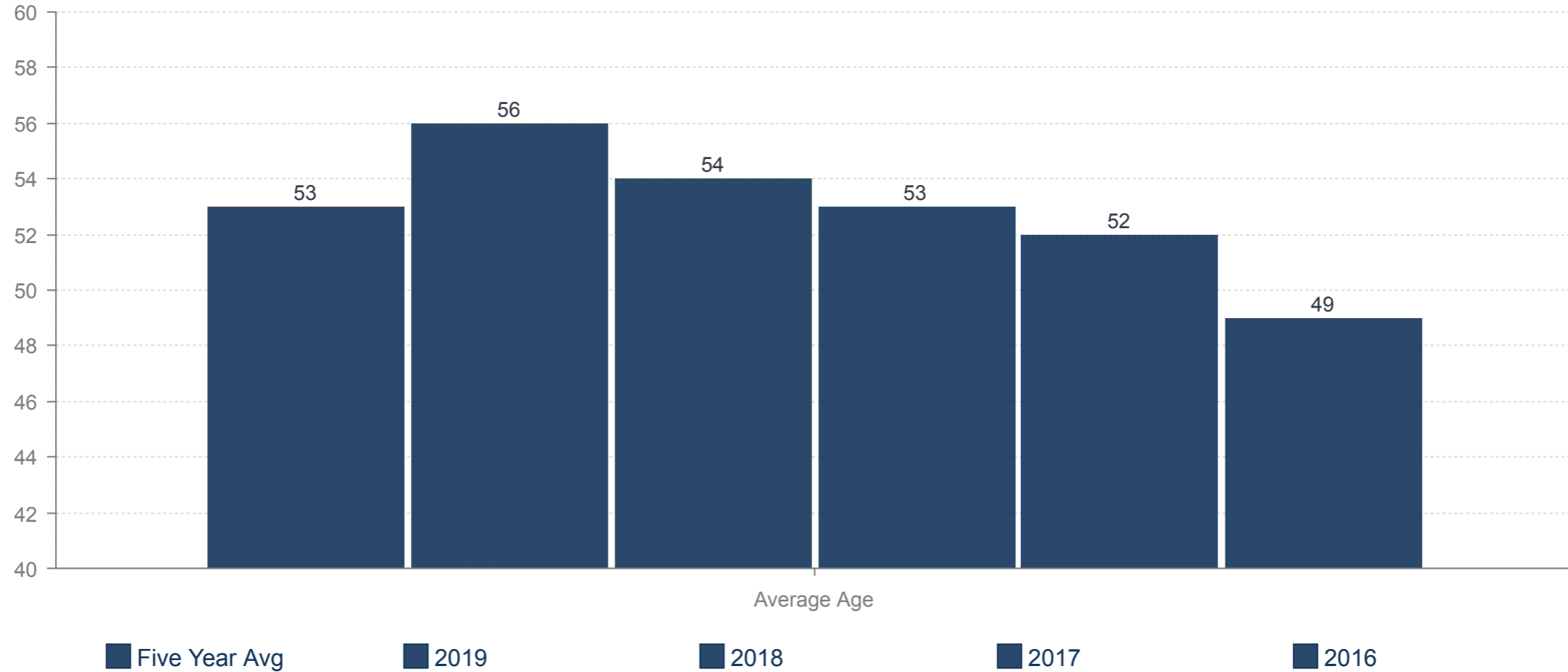
Average Age

All travelers



Five Year Average Age*

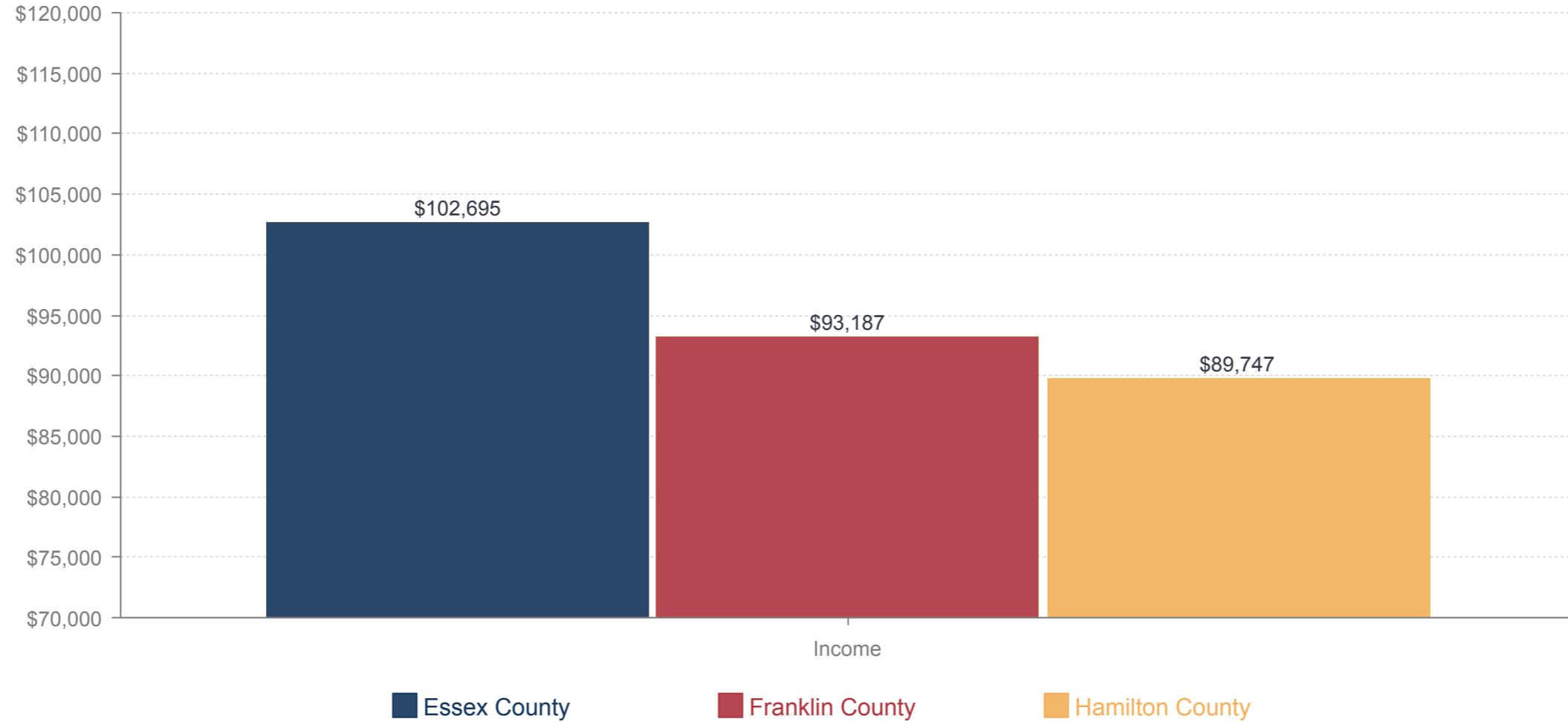
Essex County travelers



■ 2014
*2015 study not conducted

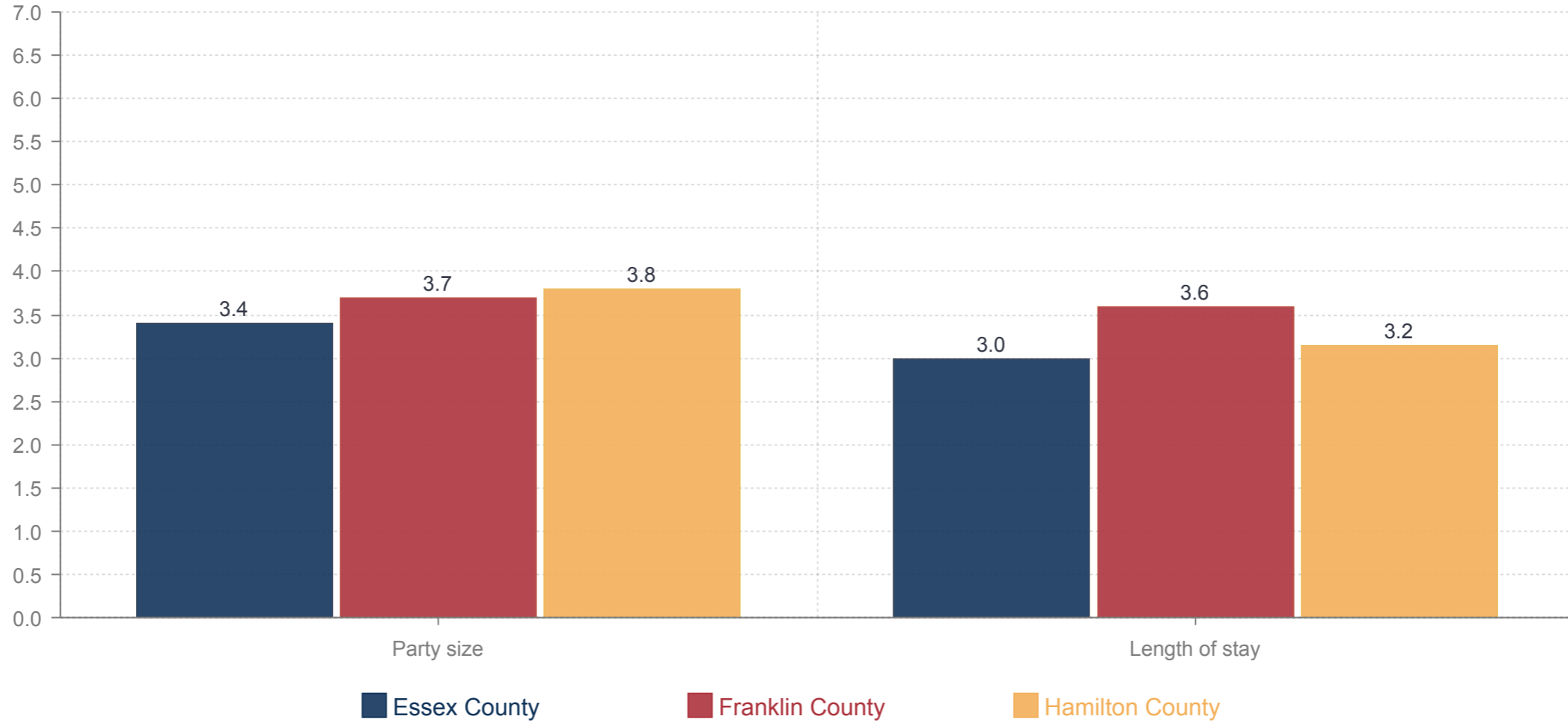
Average Income

All travelers



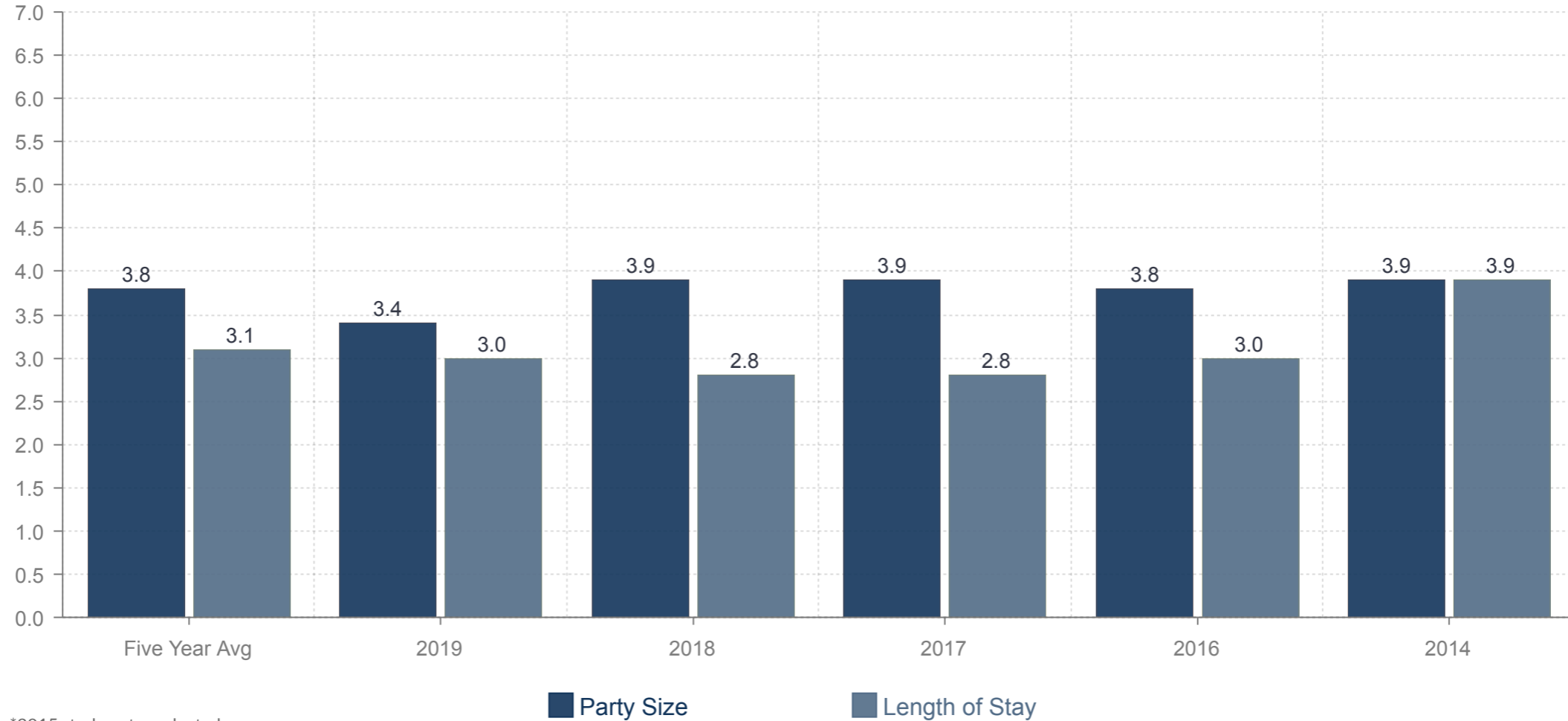
Party Size/Length of Stay

All travelers



Five Year Average Party Size / Length of Stay*

Essex County travelers



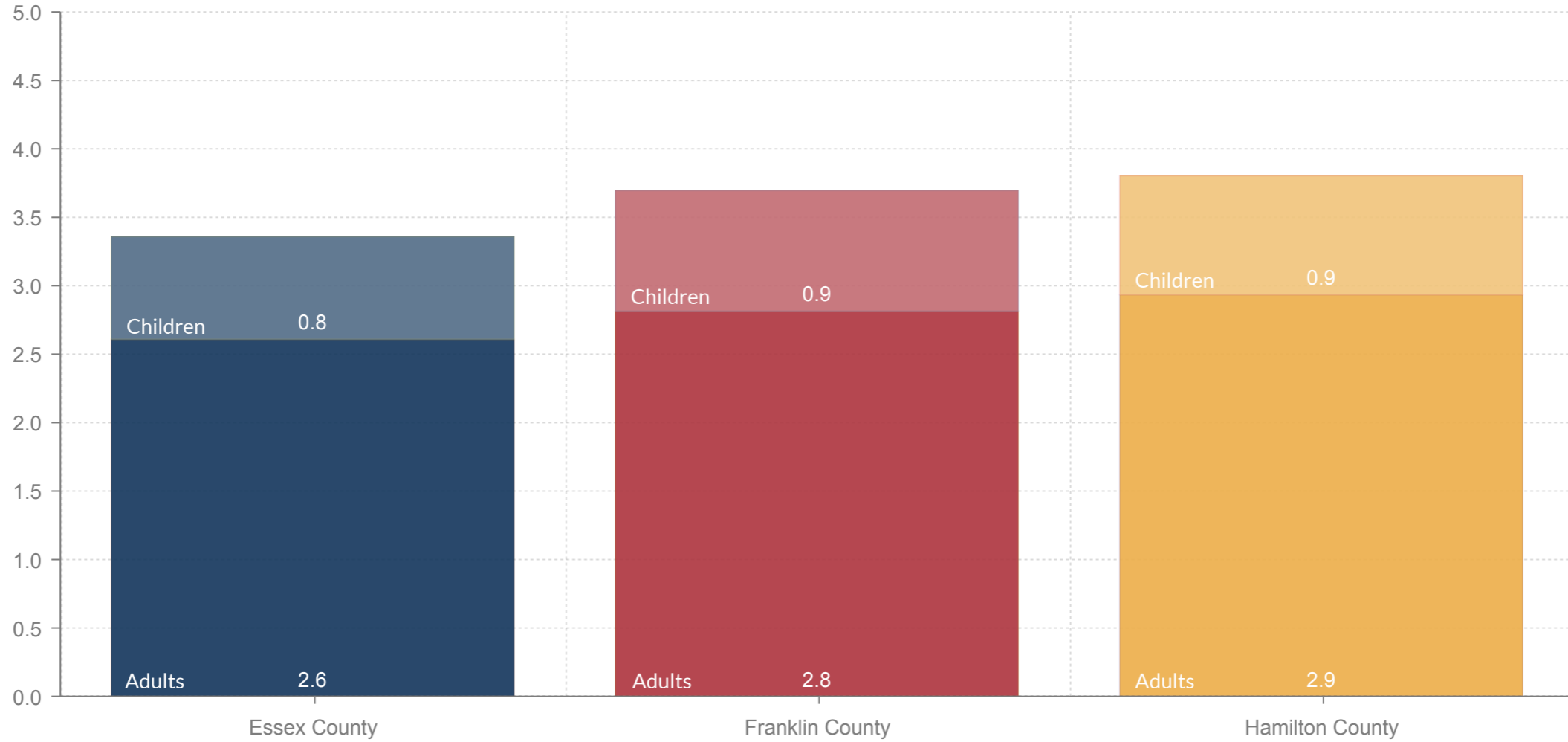
*2015 study not conducted

■ Party Size

■ Length of Stay

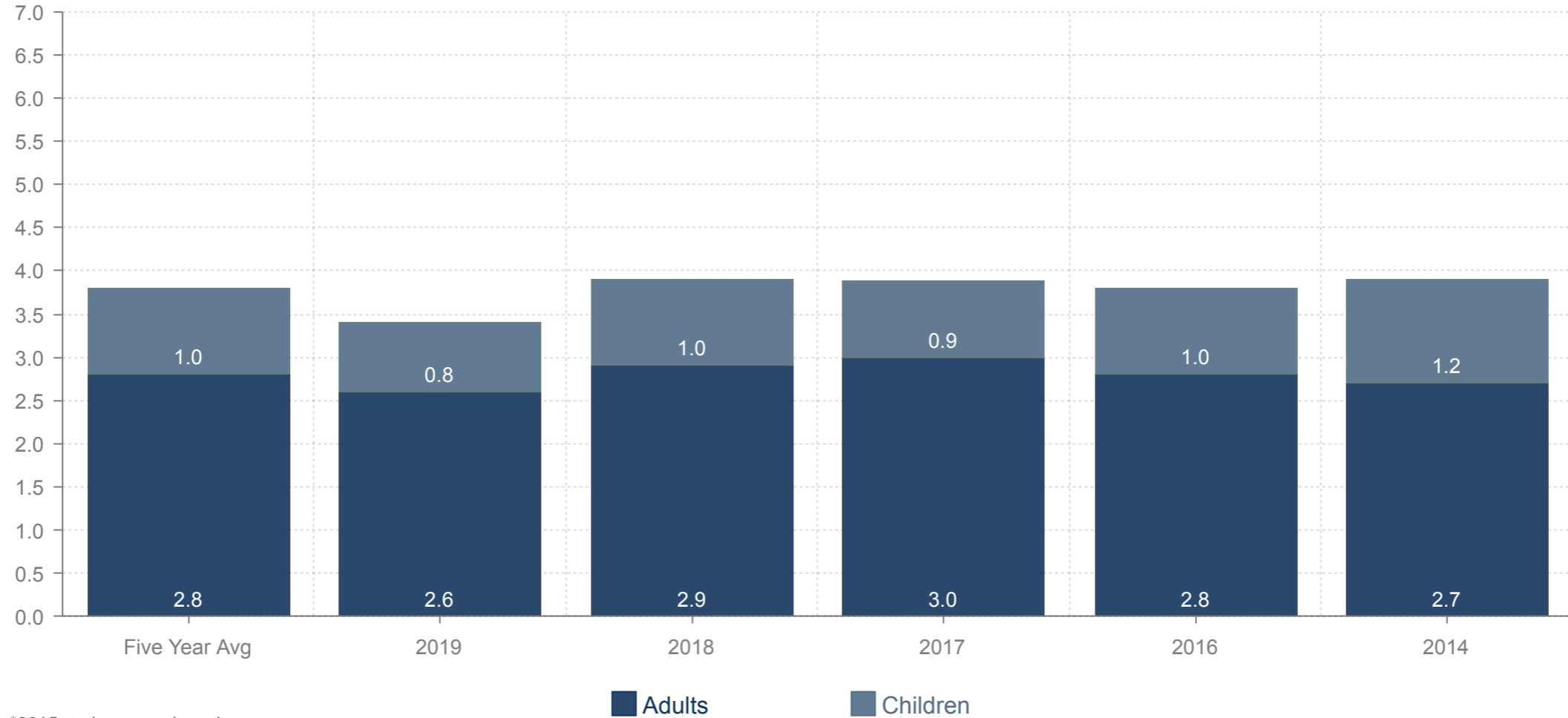
Party Composition

All travelers



Five Year Average Party Composition

Essex County travelers



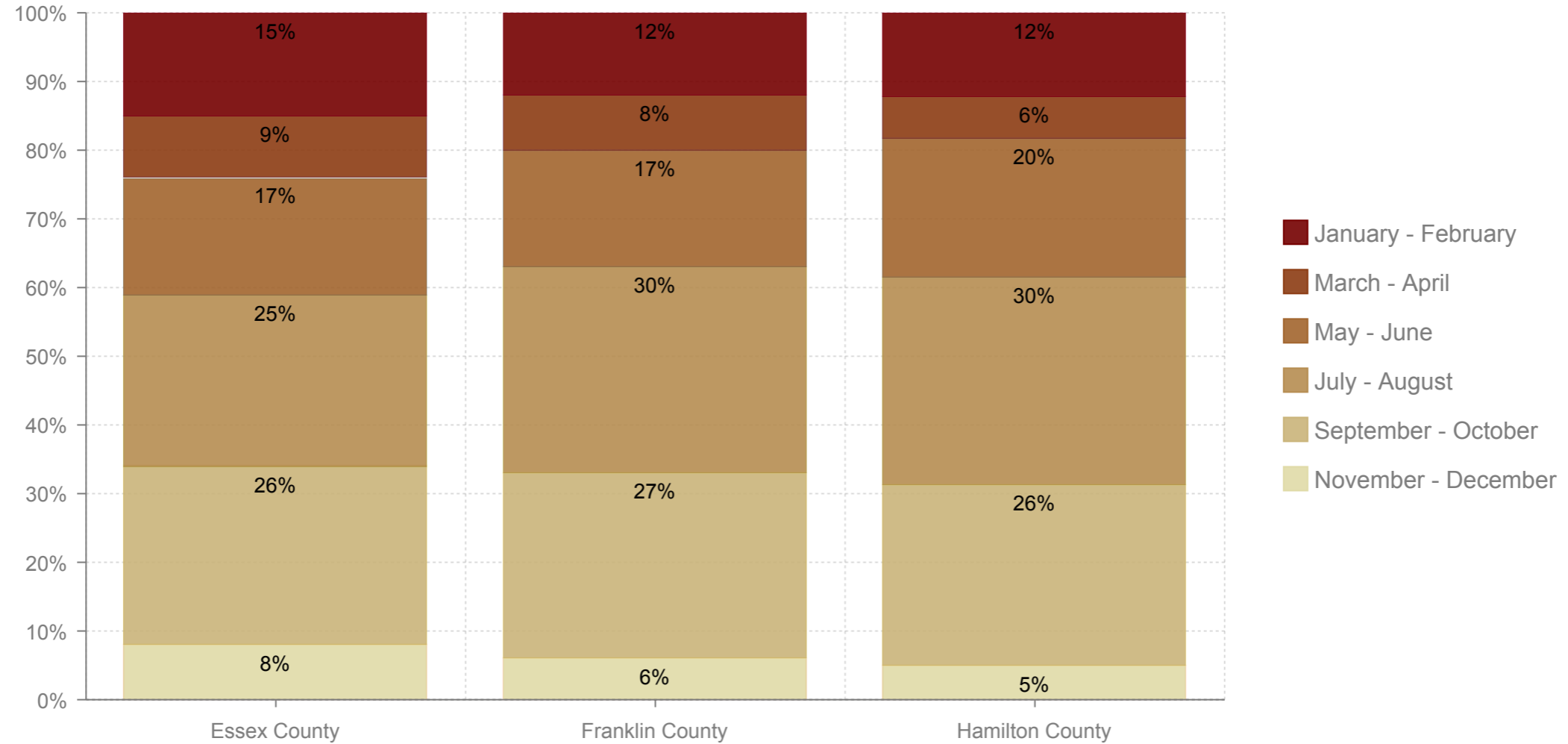
*2015 study not conducted

■ Adults

■ Children

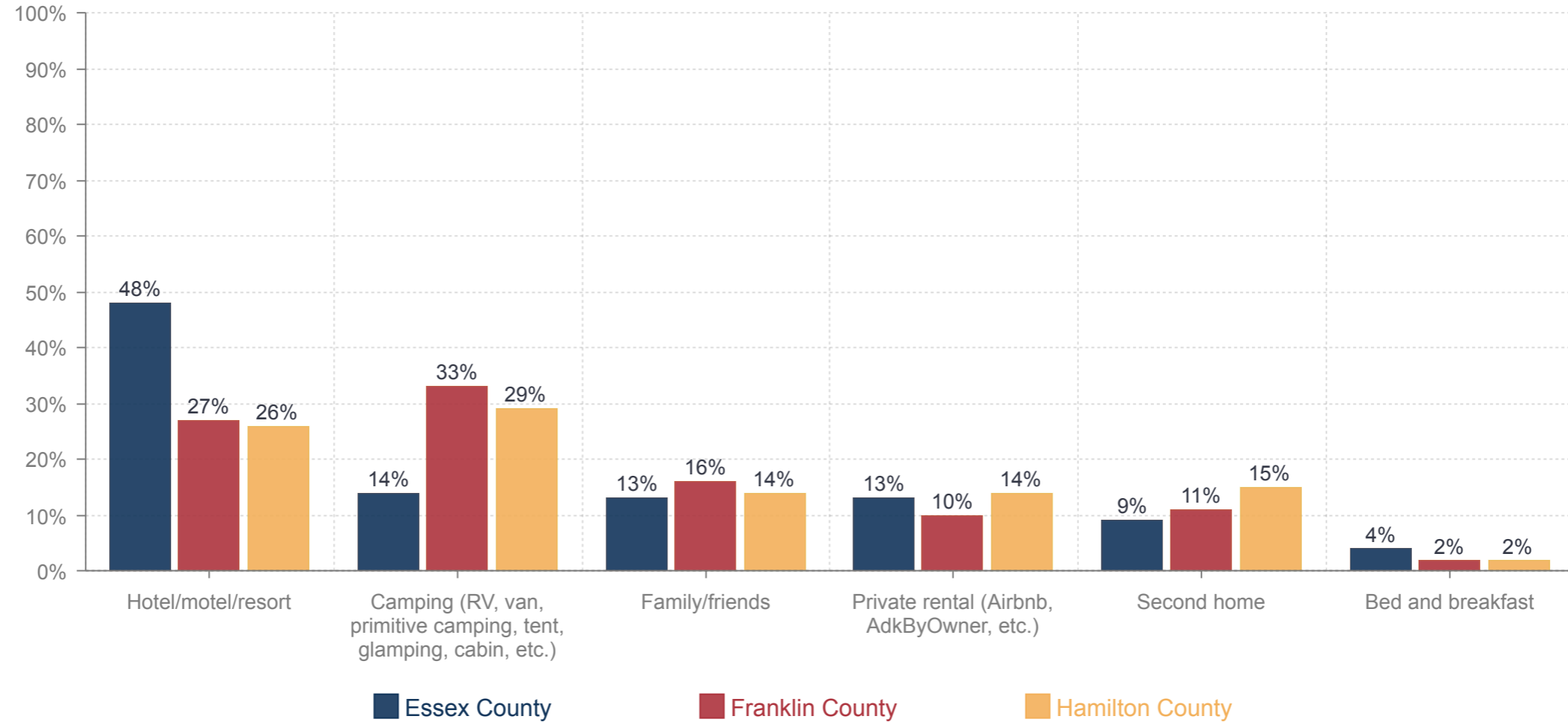
Time of Year Visited

All travelers



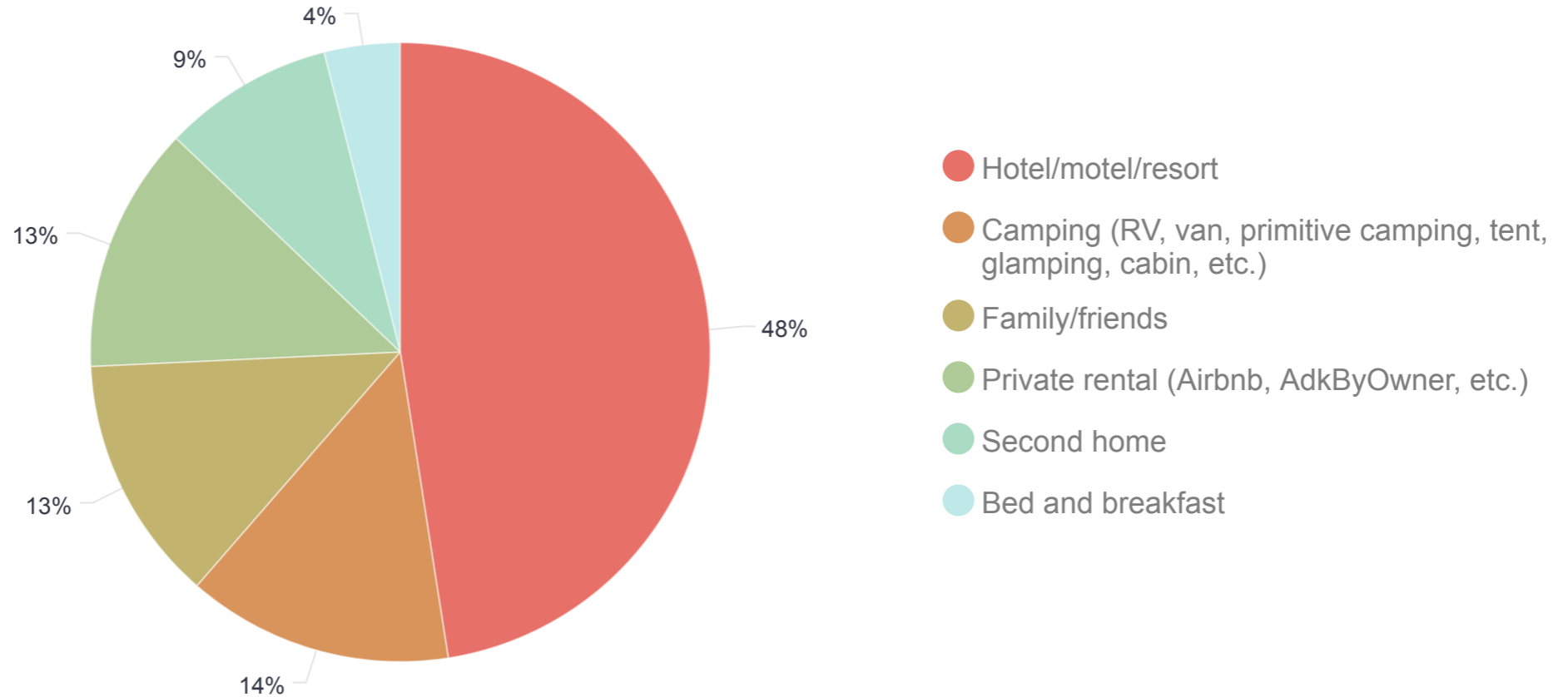
Lodging Accommodations

All travelers



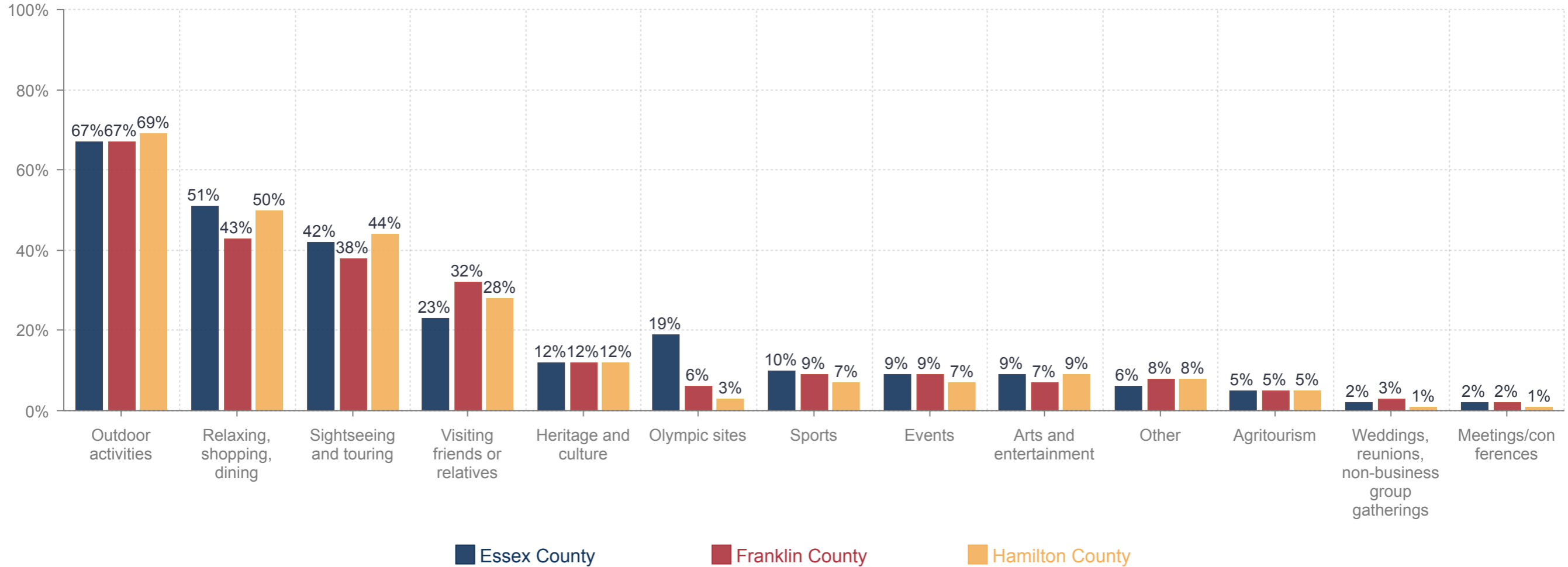
Lodging Accommodations

Essex County travelers



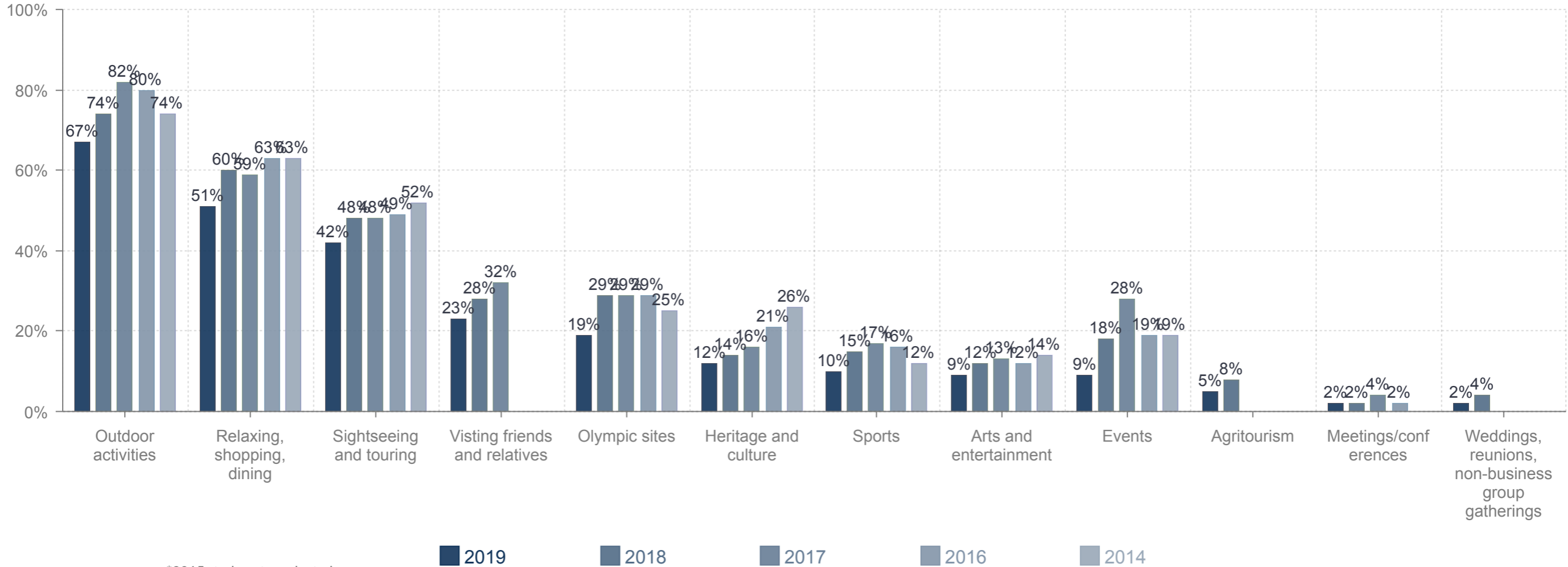
Key Attractions

All travelers



Five Year Key Attractions*

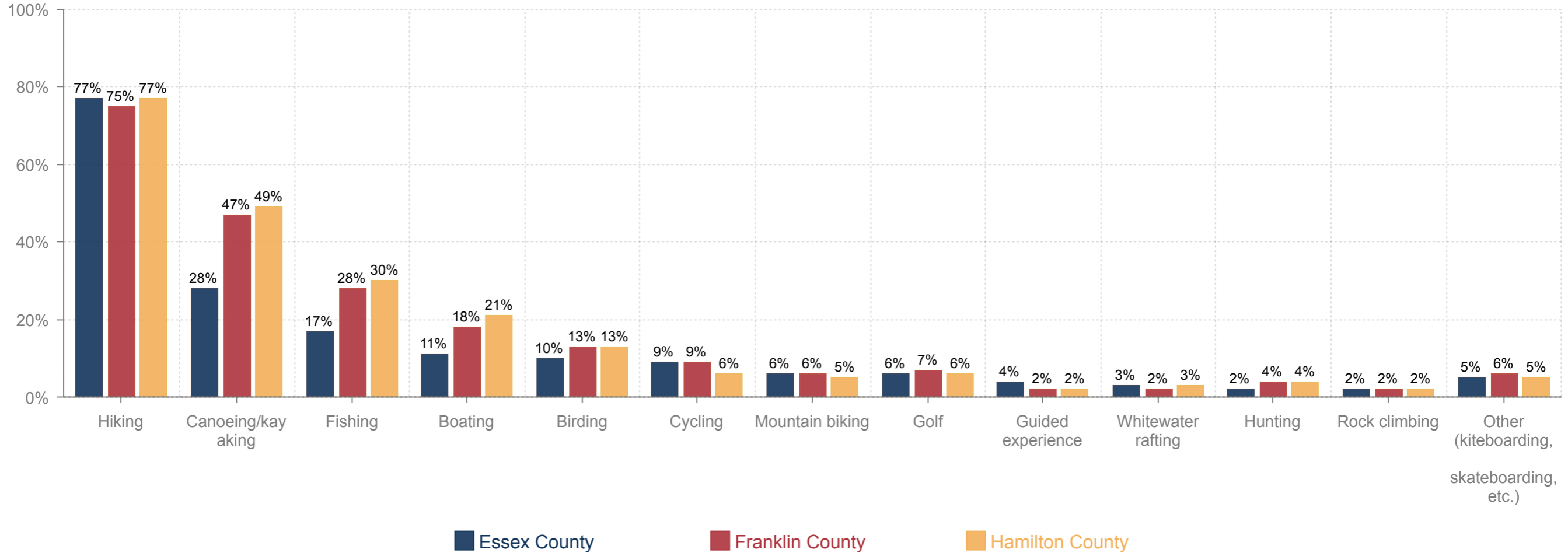
Essex County travelers



*2015 study not conducted

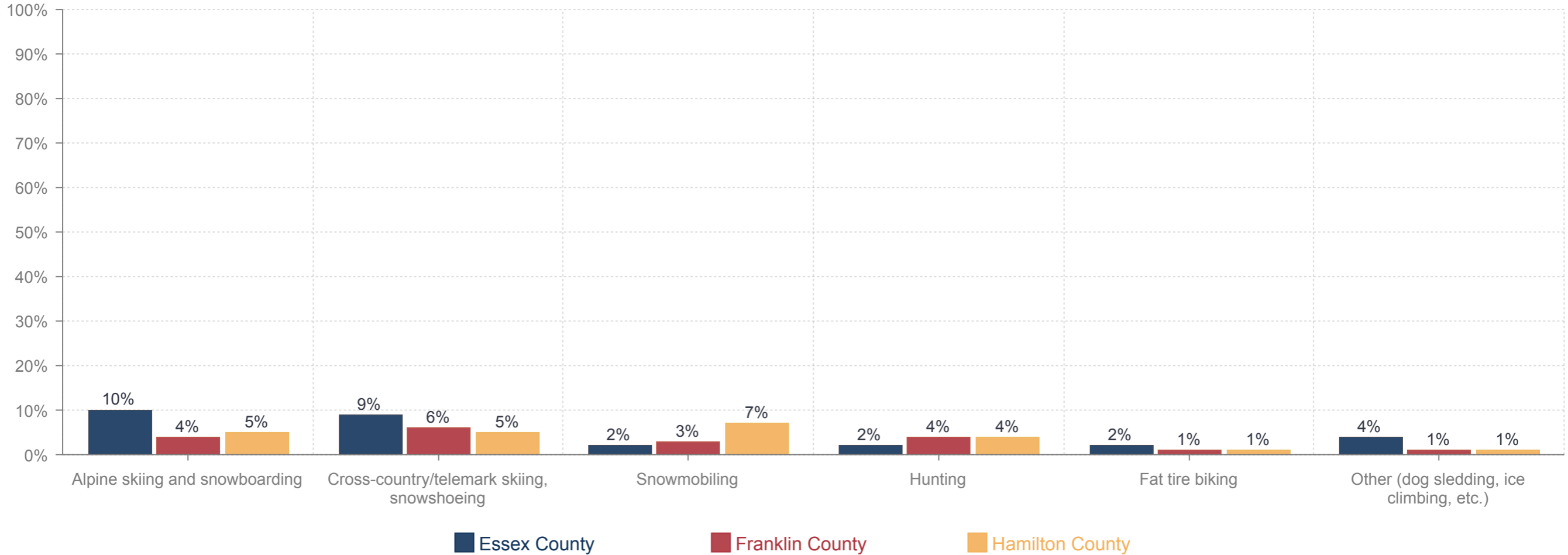
Outdoor Spring/Summer Activities

All travelers



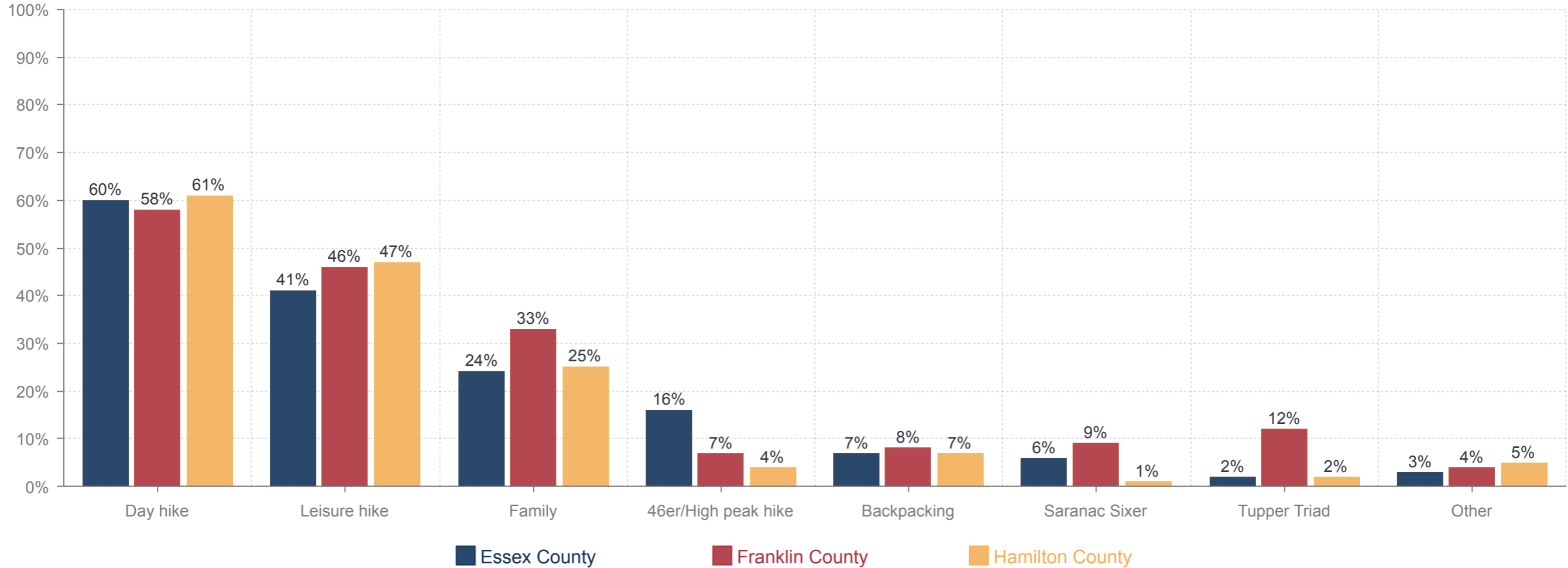
Outdoor Fall/Winter Activities

All travelers



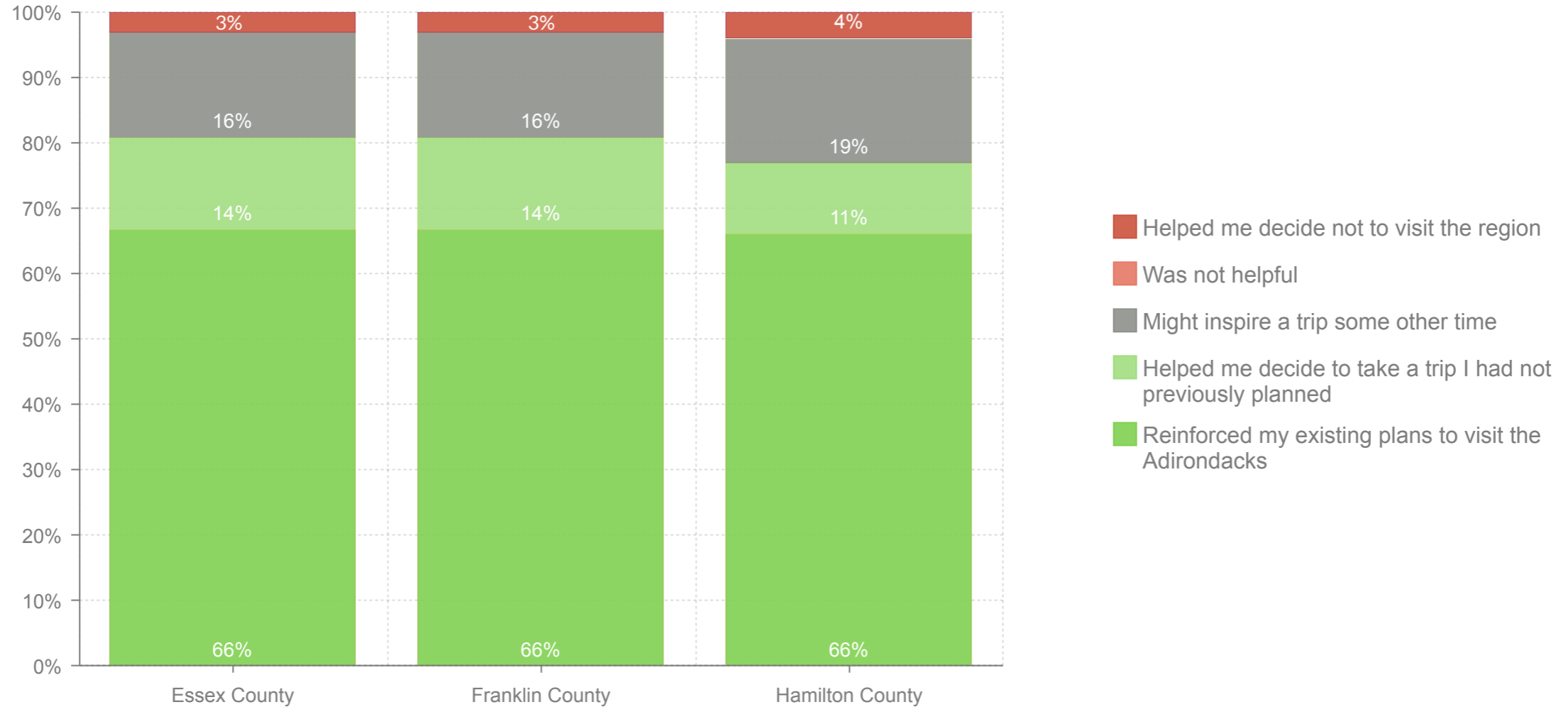
Hiking Breakdown

All travelers



Conversion Rate from Viewing ROOST Marketing Materials

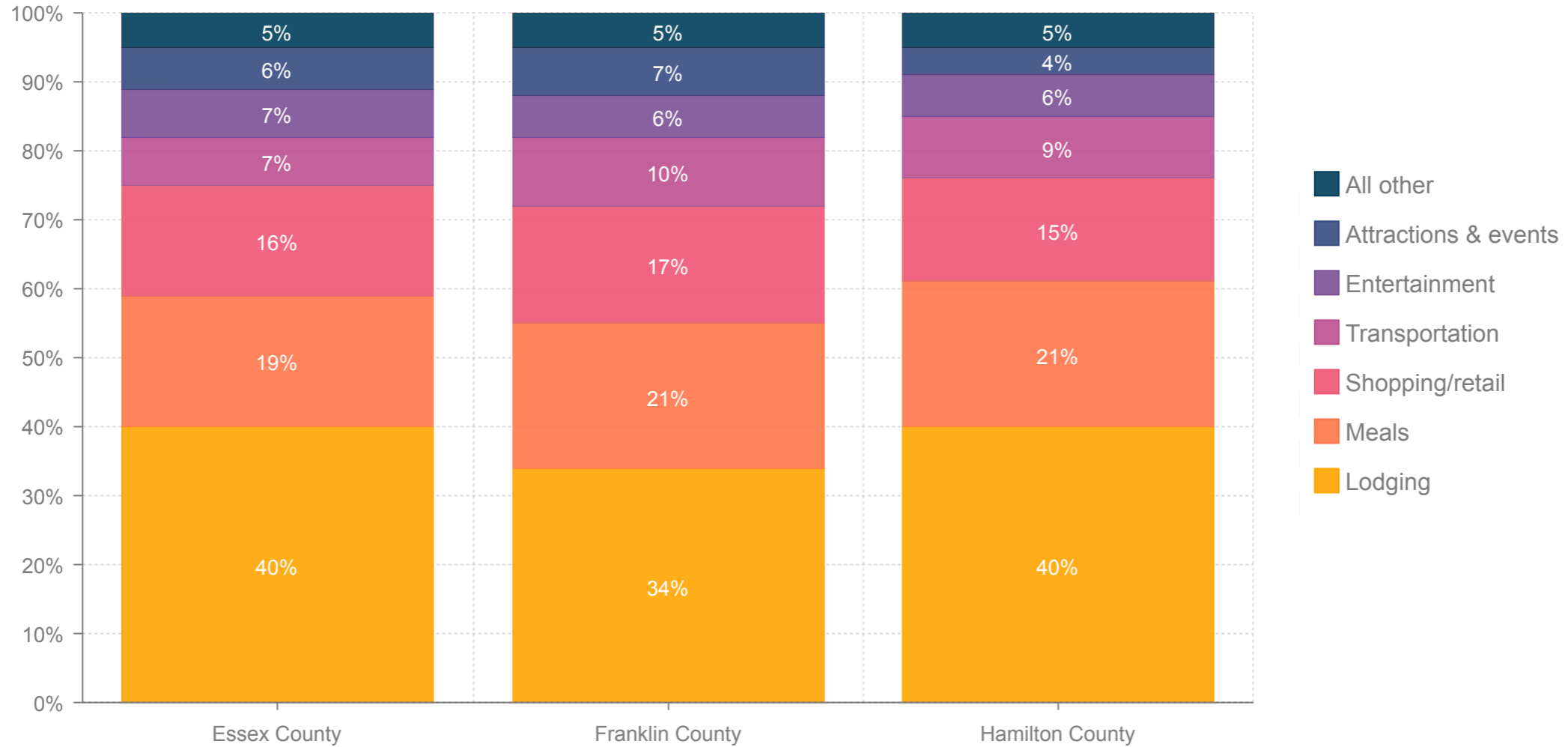
All travelers



- 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

Total Expenditure Allocation by Category

All travelers



Mean Party Expenditures

All travelers

	Essex County	Franklin County	Hamilton County
Lodging	\$500	\$306	\$390
Meals	\$245	\$185	\$200
Shopping/retail	\$87	\$92	\$82
Transportation	\$201	\$150	\$146
Entertainment	\$84	\$57	\$55
Attractions & events	\$80	\$58	\$42
All other	\$68	\$44	\$48
Average total expenditure	\$1,265	\$892	\$963
Average daily expenditure	\$419	\$250	\$306

Five Year Mean Party Expenditures

Essex County travelers

	Five year average	2019	2018	2017	2016	2014
Attractions & events	\$73	\$80	\$68	\$57	\$78	\$81
Entertainment	\$76	\$84	\$76	\$59	\$76	\$87
Transportation	\$92	\$87	\$80	\$69	\$92	\$130
Lodging	\$471	\$500	\$470	\$447	\$433	\$507
Meals	\$231	\$245	\$241	\$198	\$226	\$244
Shopping/retail	\$152	\$201	\$164	\$95	\$146	\$152
All other	\$76	\$68	\$52	\$23	\$110	\$128
Average daily expenditure	\$380	\$419	\$415	\$340	\$387	\$338
Average total expenditure	\$1,171	\$1,265	\$1,151	\$948	\$1,161	\$1,329

*2015 study not conducted

Essex County Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

All Essex County travelers

- Average traveler party age of respondents was 56 years old, higher than the five-year average visitor age of 53.
- Mean annual reported household income of travelers was \$102,695, which is just below the five-year average of \$103,487.
- Average reported total traveler party size was 3.4 persons, including an average of 2.6 adults and 0.8 children.
- Visitation by NY residents comprised 65% of total respondents.
- One-third of NY resident travelers are from the Capital District north and about one-quarter are from central or western NY.

Visitor Profile

All Essex County travelers

- Northeastern U.S. residents continued to be the next strongest market at 19%. Visitation from other areas of the U.S. declined a bit from the prior year to 5% total. Canadian travelers have increased steadily in the last several years, from 5% in 2017 to 8% in 2018 and 11% in 2019.
- Average stay reported was 3 nights, increasing slightly from the reported nights stayed by 2018 travelers. This is nearly even with the five-year reported average of 3.1 nights.
- Times that travelers noted visiting Essex County in 2019 were quite different from prior years, with fall (September/October) comprising 26% of visits and peak summer months (July/August) falling to 25% of visits.

Visitor Profile

All Essex County travelers

- Other seasons of the year for visitation stayed more consistent in comparison to prior year data. Later spring (May/June) marked 17% of visits, January-February marked 15% of visits, March/April 9% of visits and November/December 8% of visits.
- Outdoor activities remained the largest draw to the area by 67% of respondents.
- "Relaxing, dining, and shopping" remained the second most frequently reported draw to visit the region (51%), followed by sightseeing (42%). Visiting friends was reported as an attraction to visit by 23% of travelers.
- Total estimated trip expenditure was \$1,265, a nearly 10% increase from 2018 higher than the five-year average reported expenditures. This has trended upward for the past four years, after a period of declines in the first half of the decade.

Visitor Profile

All Essex County travelers

- Spending on lodging, shopping, and attractions/events were all considerably higher reported expenditure categories in 2019.
- Total estimated revenue generated directly by travelers touched by ROOST was nearly \$299 million in 2019.
- This produces an estimated ROI of \$100 in leisure traveler-related revenue for each occupancy tax dollar expenditure, an increase over the last several years.
- Data show an extremely strong year for visitation in Essex County in 2019. The trend of shorter stays in the area noted in the last four years appears to have “leveled off,” with an even slight increase reported by 2019 respondents.
- Large gains in estimated visitation and expenditures across nearly all categories were noted in 2019.