

Leisure Travel Study

Essex, Franklin, and Hamilton County Region

2019 County Visitor Profiles and Regional
Return on Marketing Investment Analysis

Oct 2020

ROOST

Project Background & Methodology

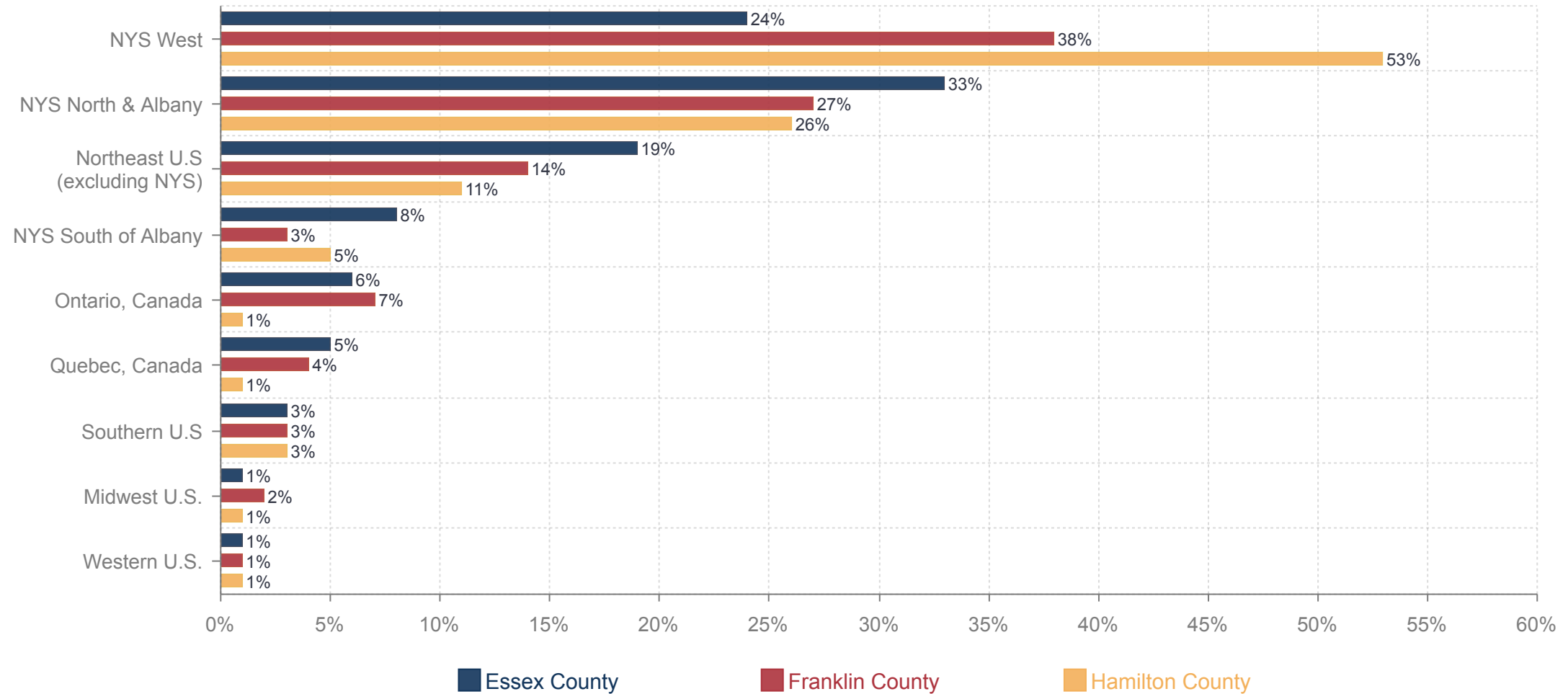
- ROOST commissioned a study, as it has for the past four years, to determine leisure traveler information for the counties of Essex, Franklin, and Hamilton, with a summary regional report, to gauge key traveler information and regional marketing program statistics.
- ROOST contracted with PlaceMaking, a regional community and economic development research firm, to complete this research. It measures the leisure travel market and does not reflect impacts produced by the meeting/convention market.
- Electronic invitations were sent to a sample of travel information inquirers from throughout 2019 (in April, July, and September 2019 and January 2020. Visitors were requested to complete an online survey (via social media and e-mail) and results were compiled from the responses received from travelers to the region in 2019.

Project Background & Methodology

- 367,288 potential travelers inquired about travel to the three-county region in 2019 and provided contact information (so that they are traceable leads).
- Just over 200,000 invitations were sent by ROOST through electronic mail and FaceBook advertising to potential regional visitors.
- 9,055 complete surveys were received from unique respondents, with 4,449 travelers responding that they visited the three-county region in 2019.

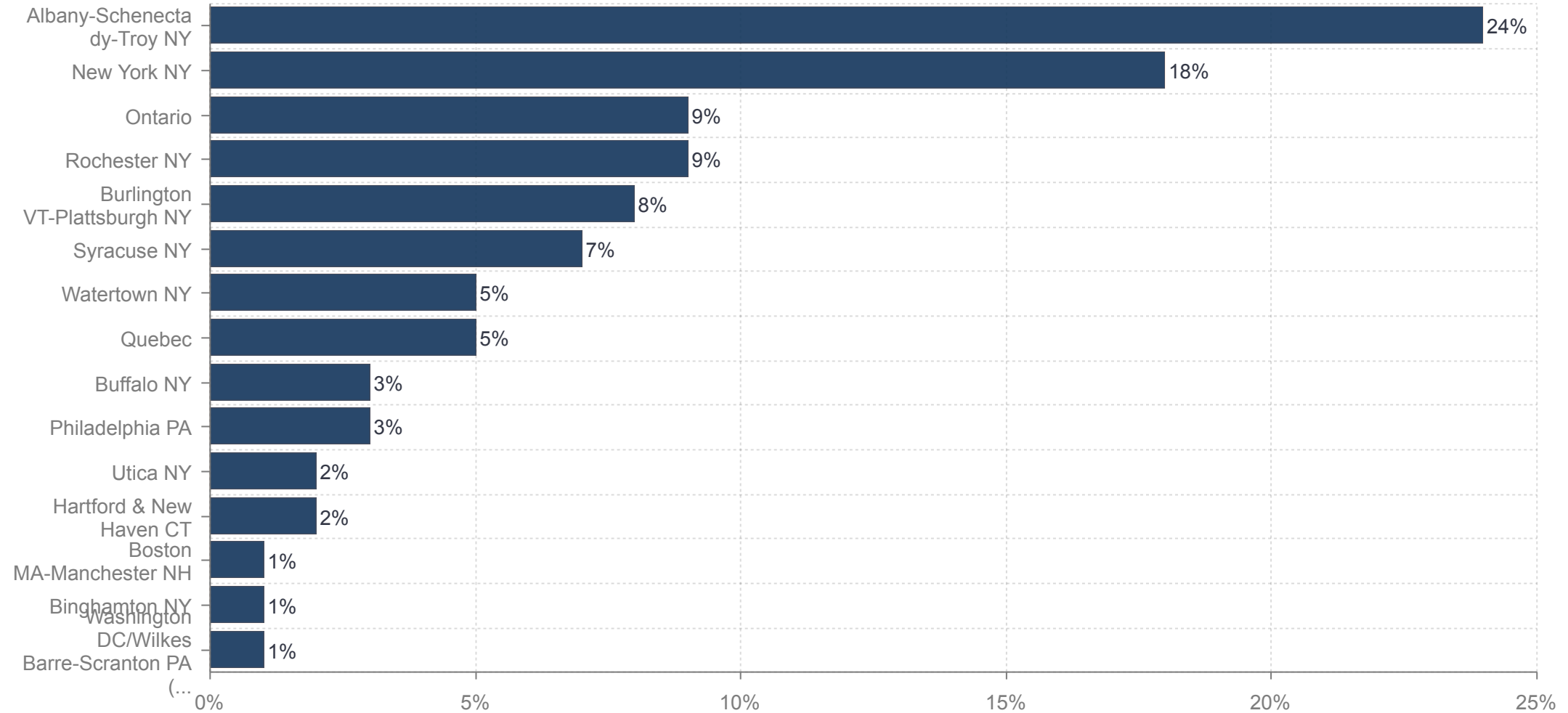
Area of Residence

All travelers



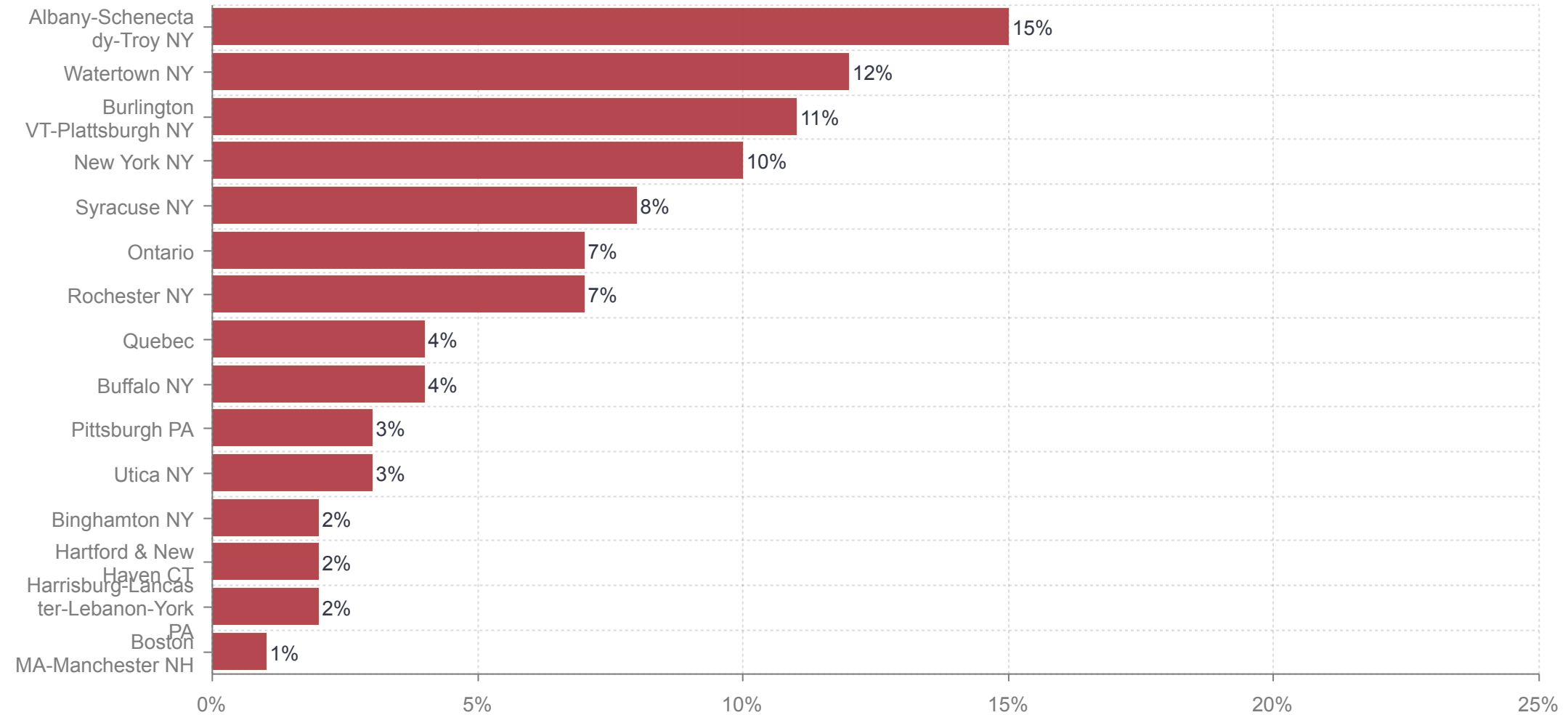
Area of Residence by DMA

Essex County travelers



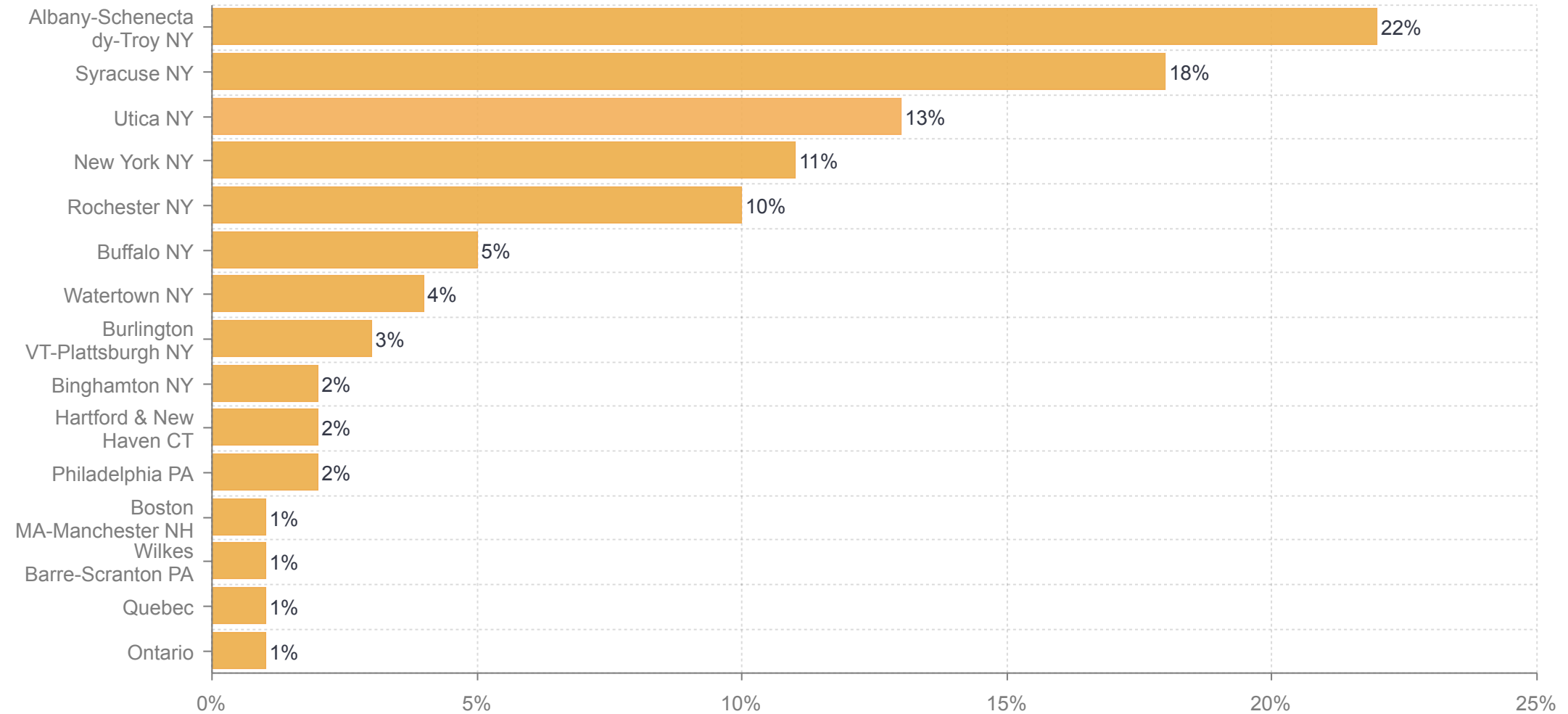
Area of Residence by DMA

Franklin County travelers



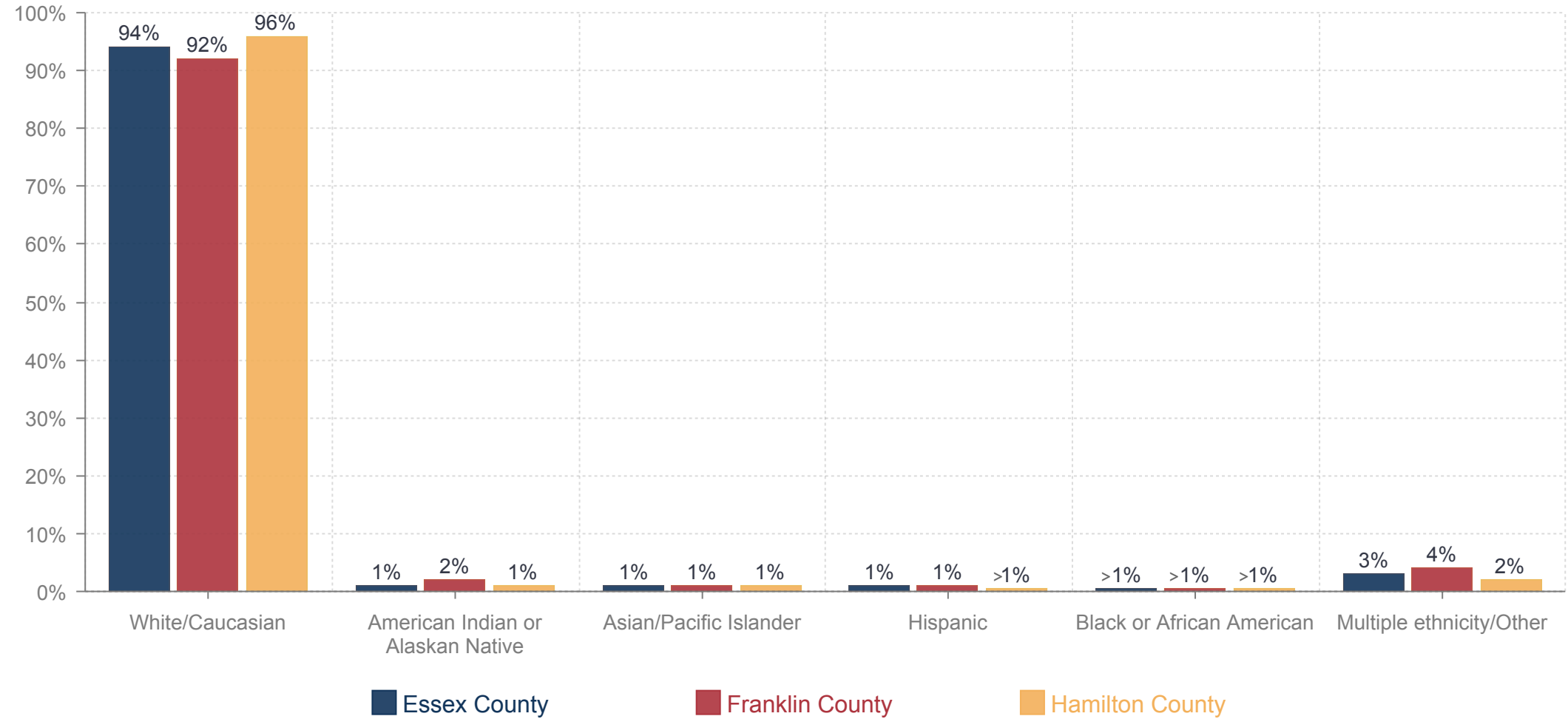
Area of Residence by DMA

Hamilton County travelers



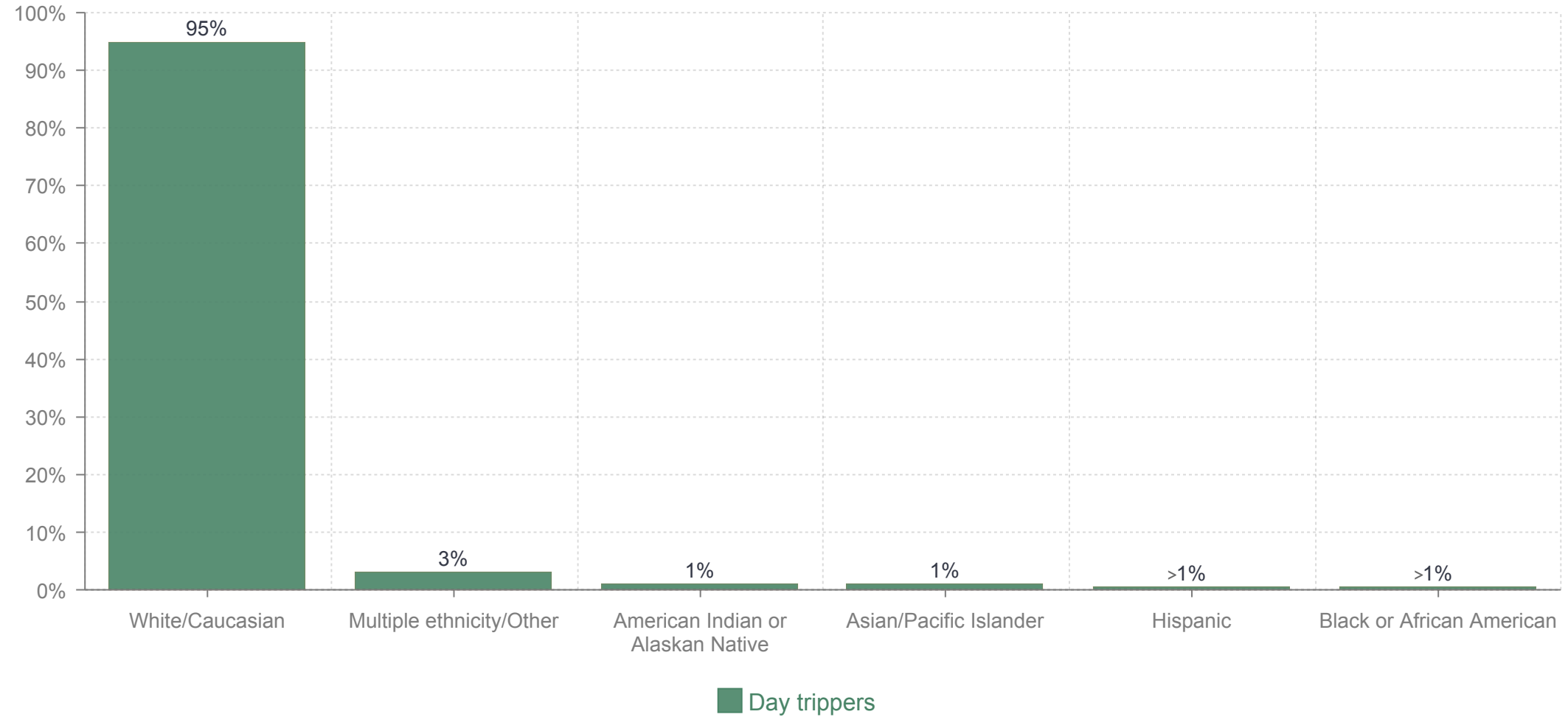
Ethnicity

All travelers



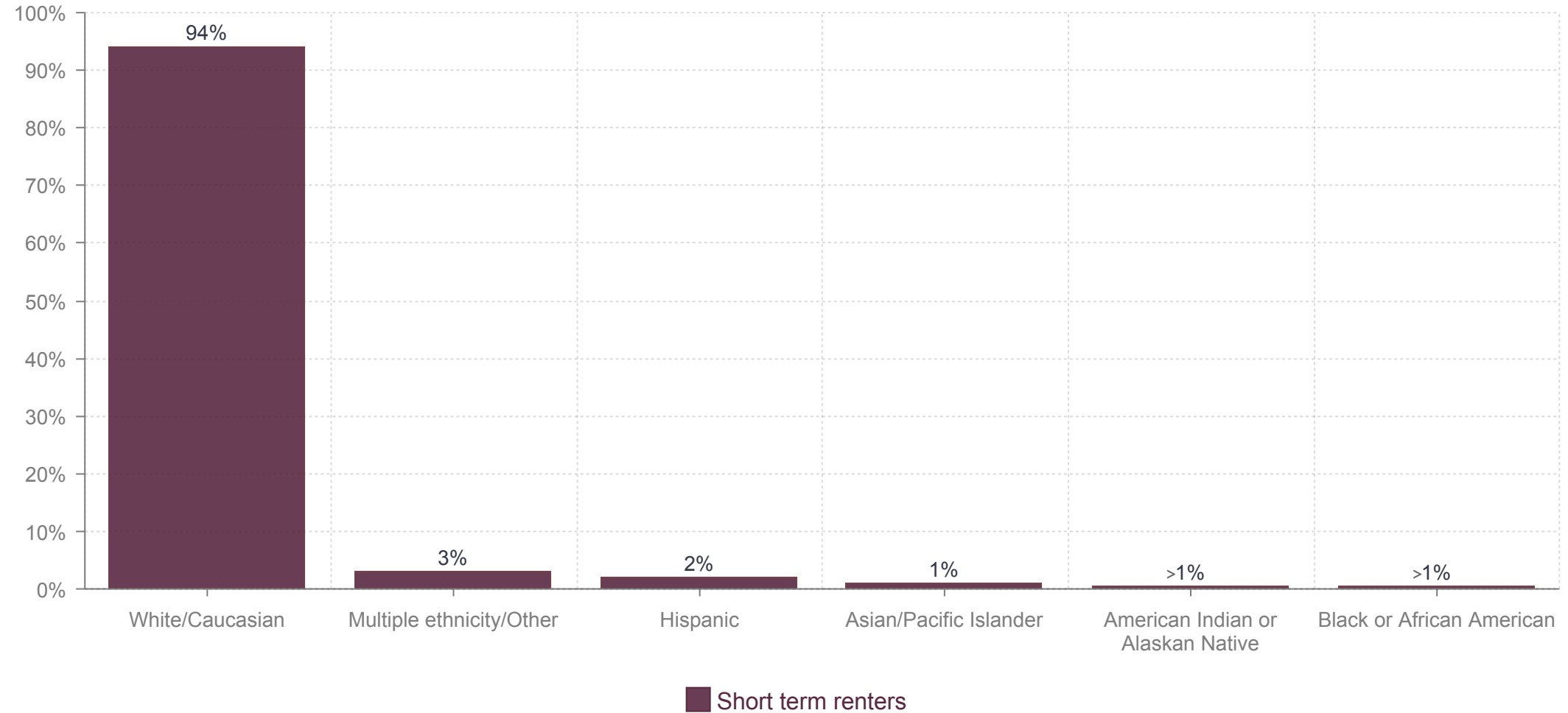
Ethnicity

Day trippers



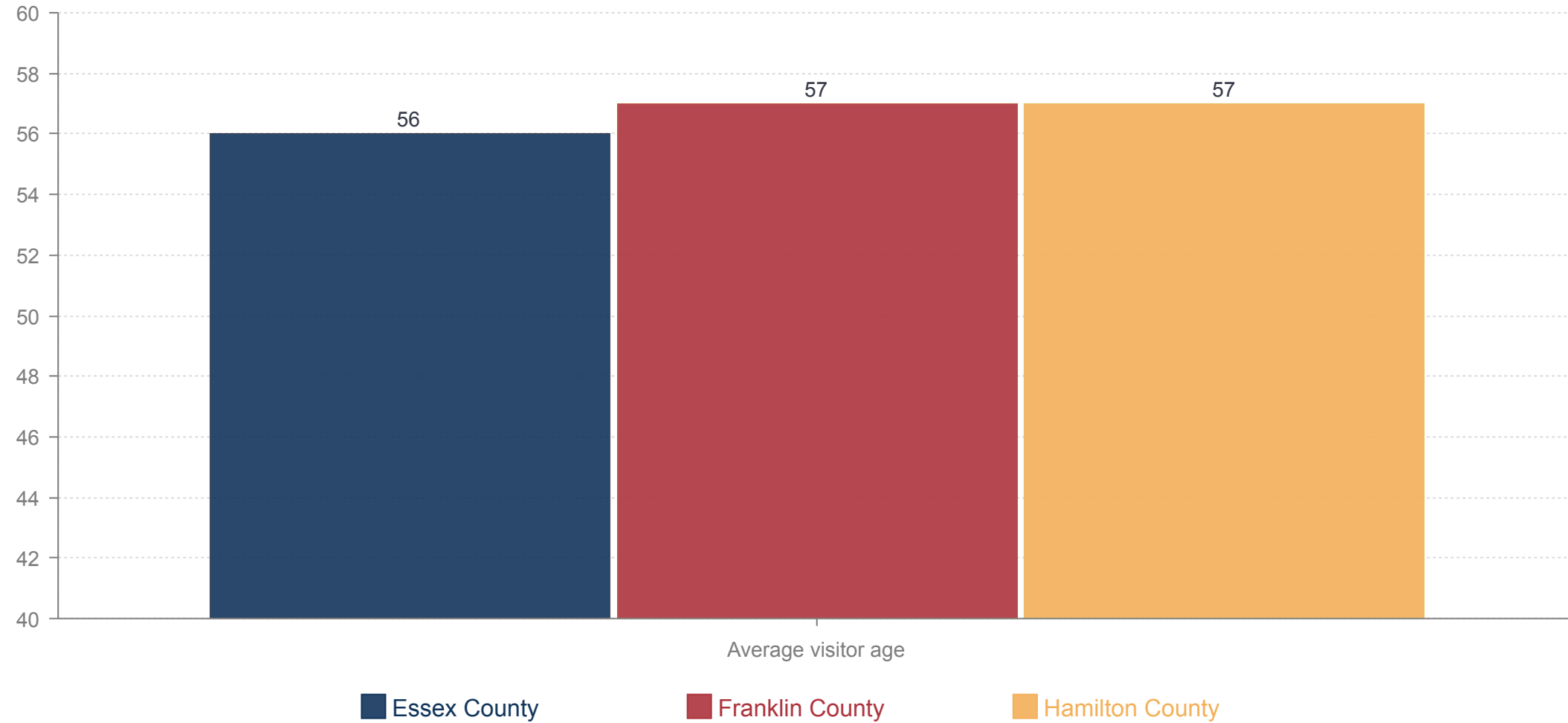
Ethnicity

Short term renters



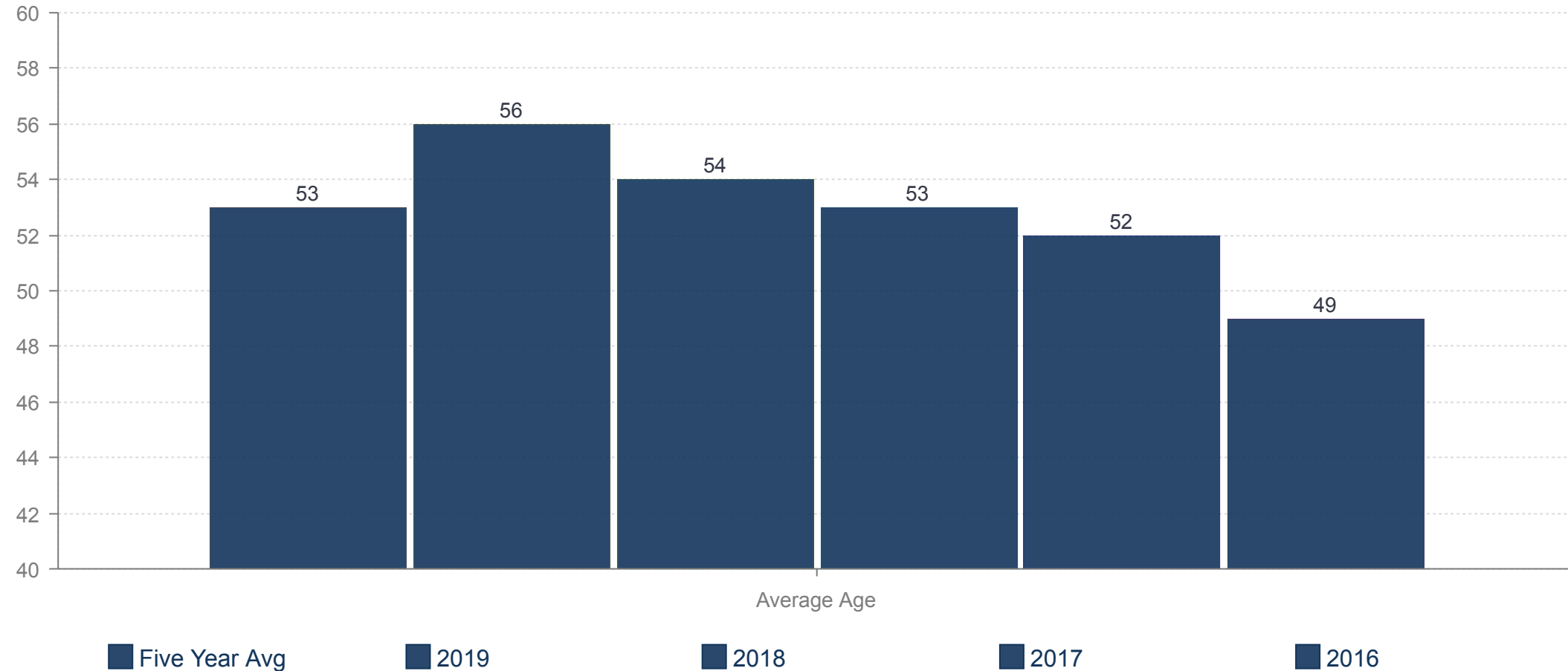
Average Age

All travelers



Five Year Average Age*

Essex County travelers



*2015 study not conducted

Average Age

Day trippers



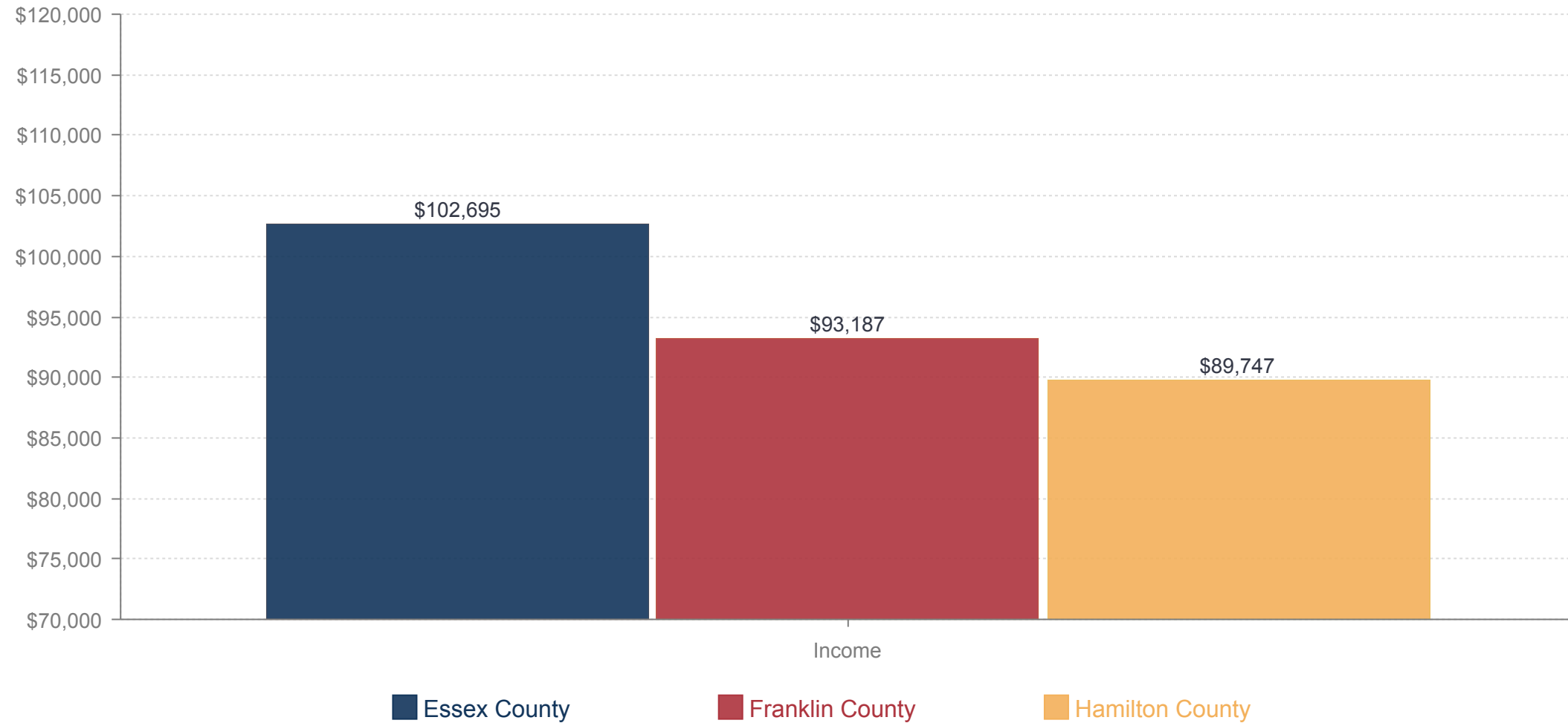
Average Age

Short term renters



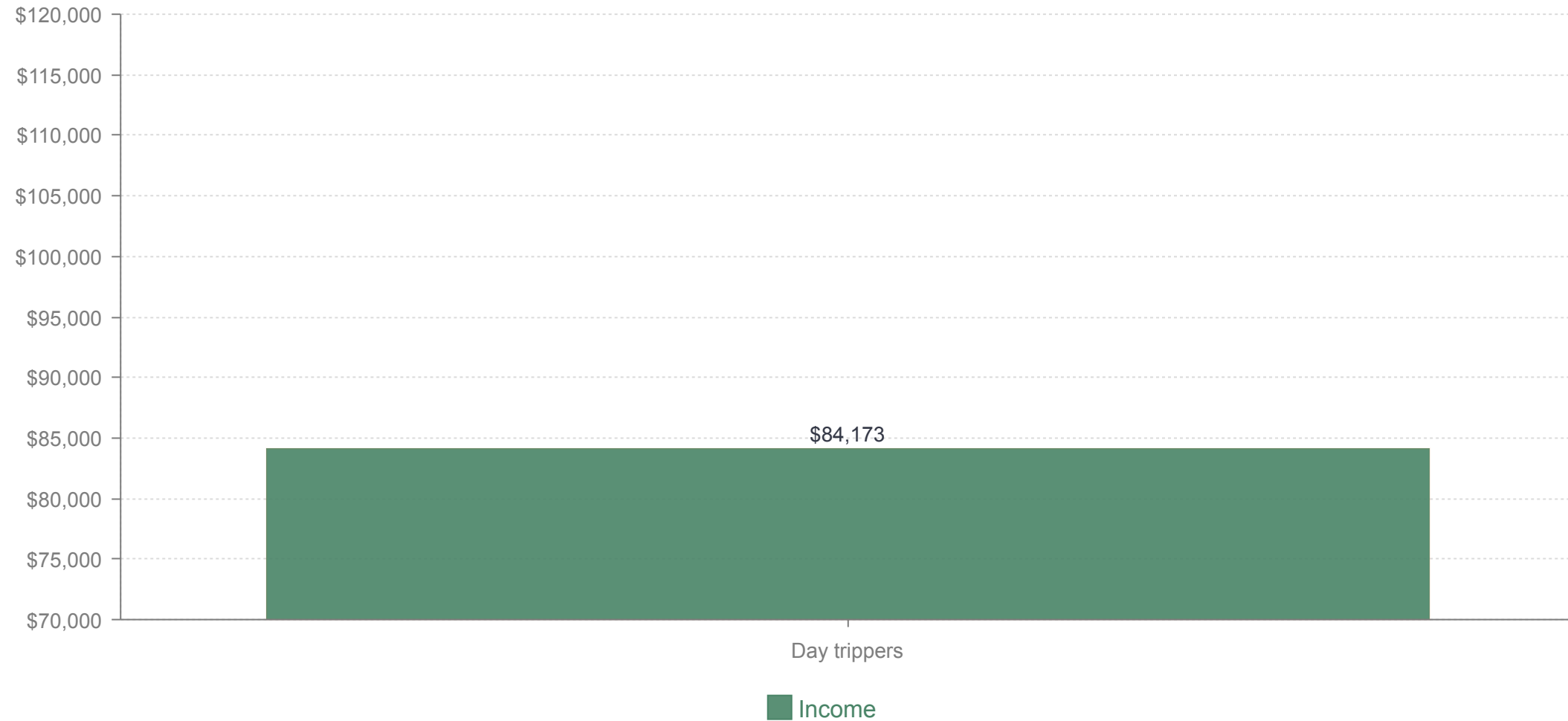
Average Income

All travelers



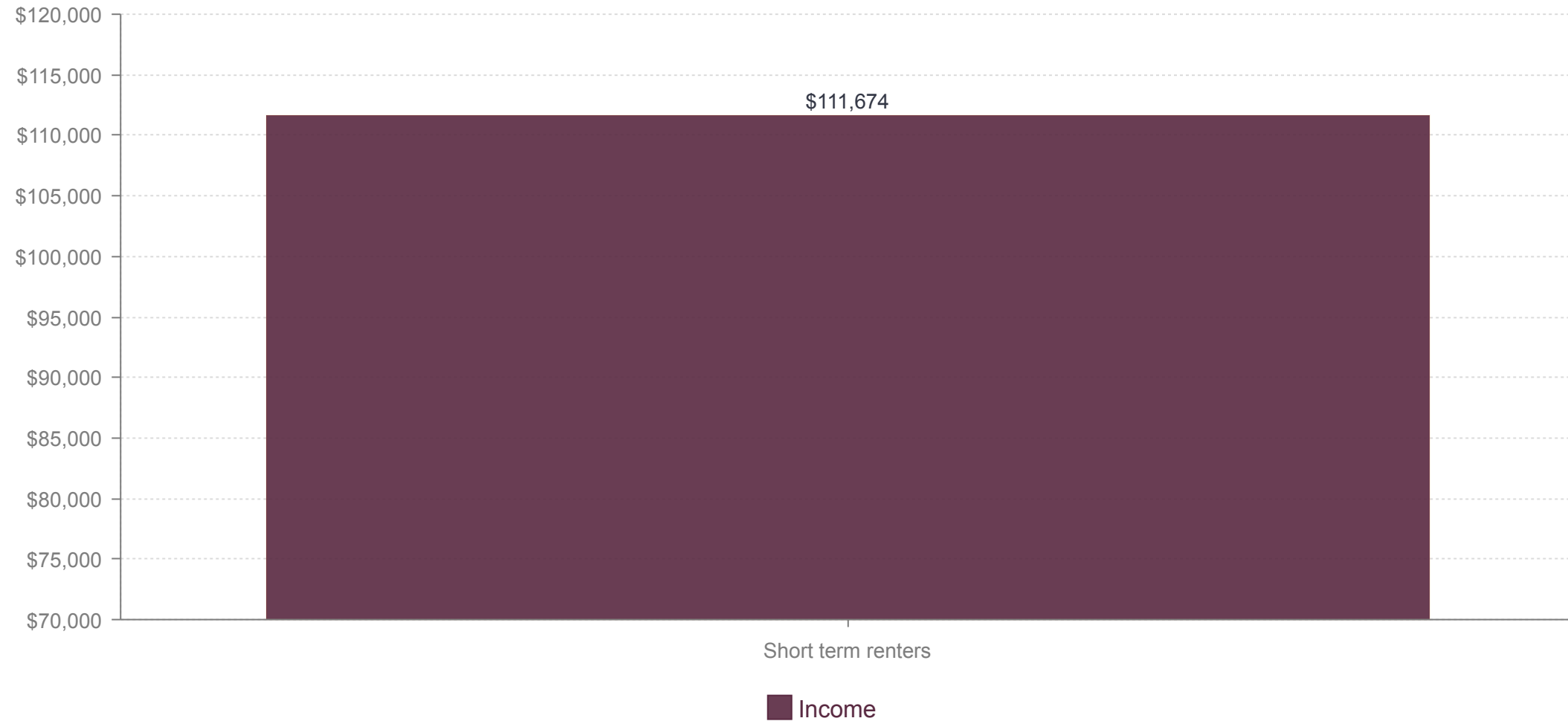
Average Income

Day trippers



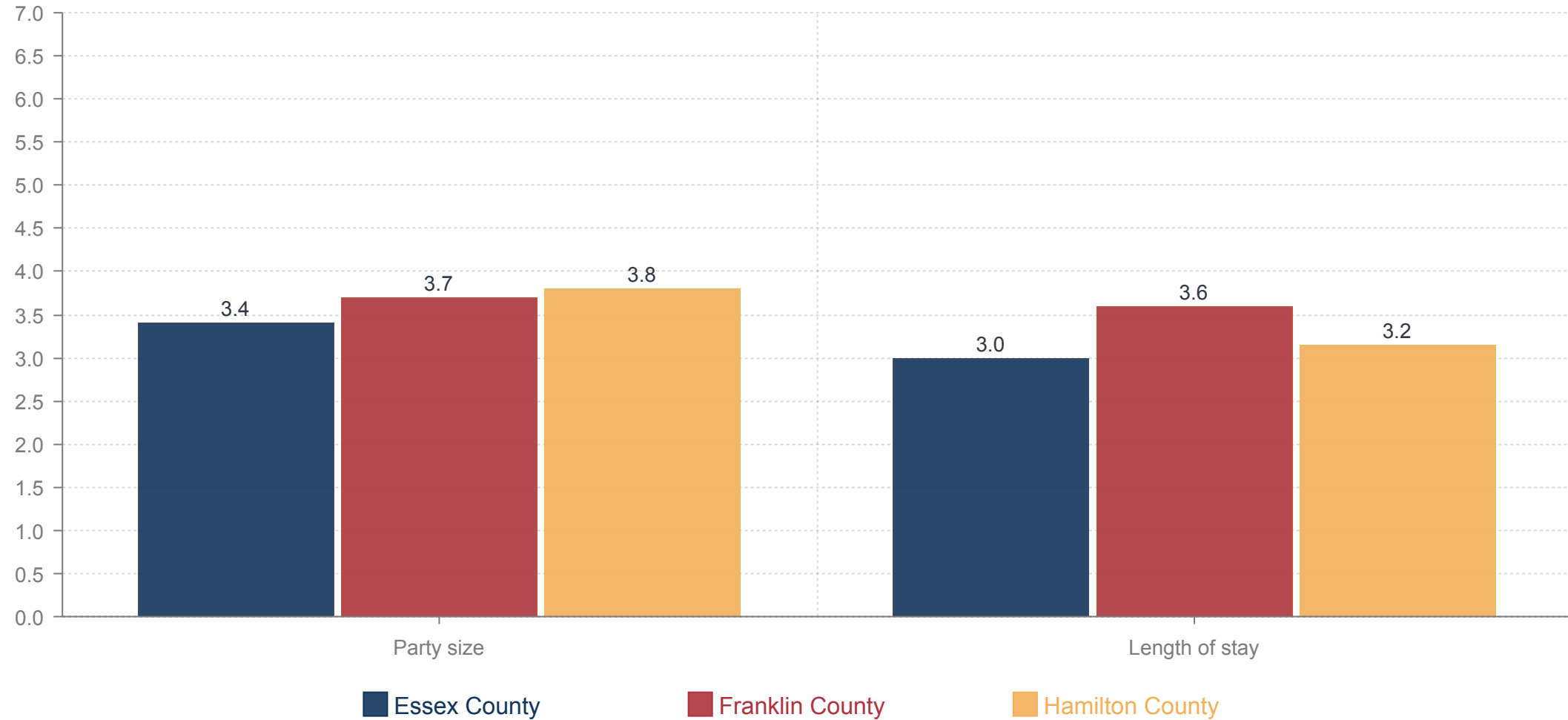
Average Income

Short term renters



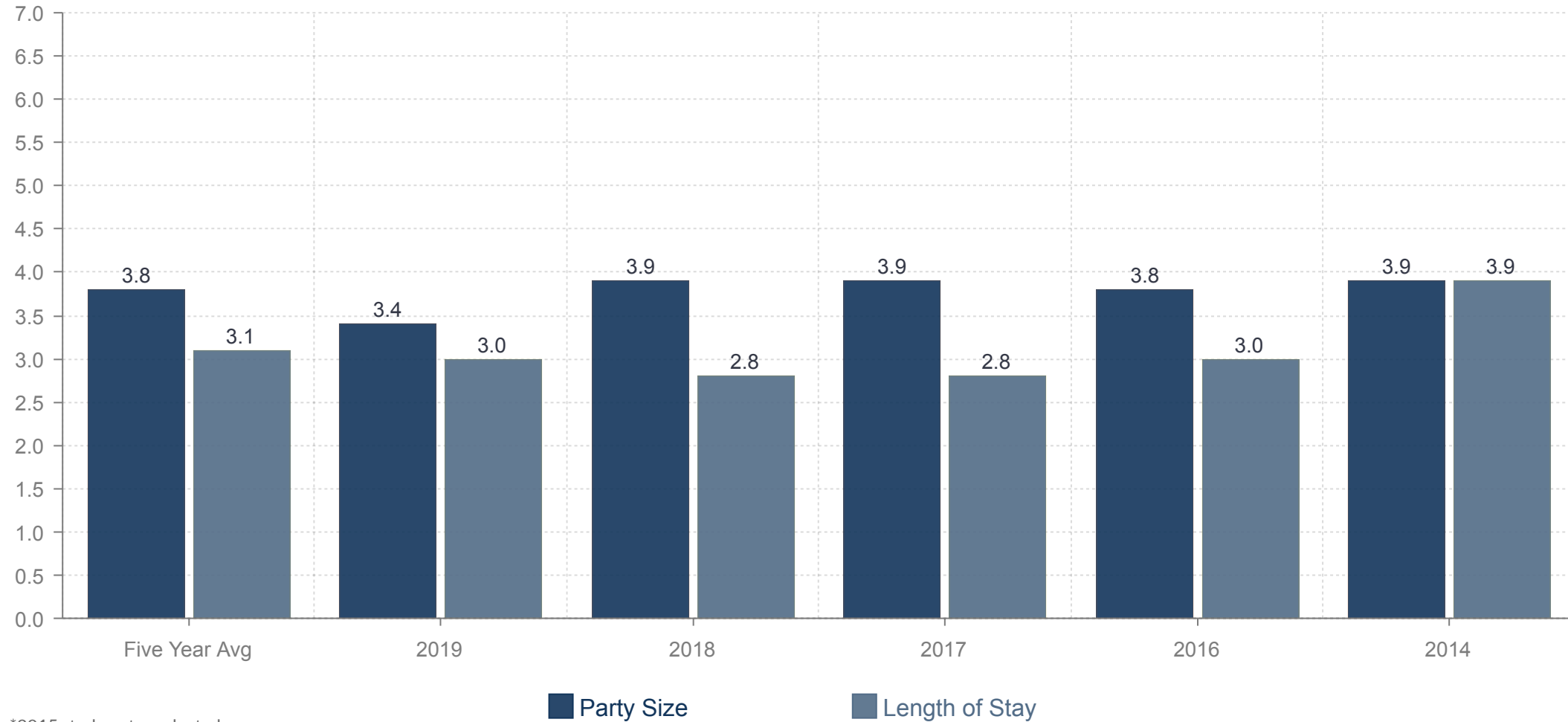
Party Size/Length of Stay

All travelers



Five Year Average Party Size / Length of Stay*

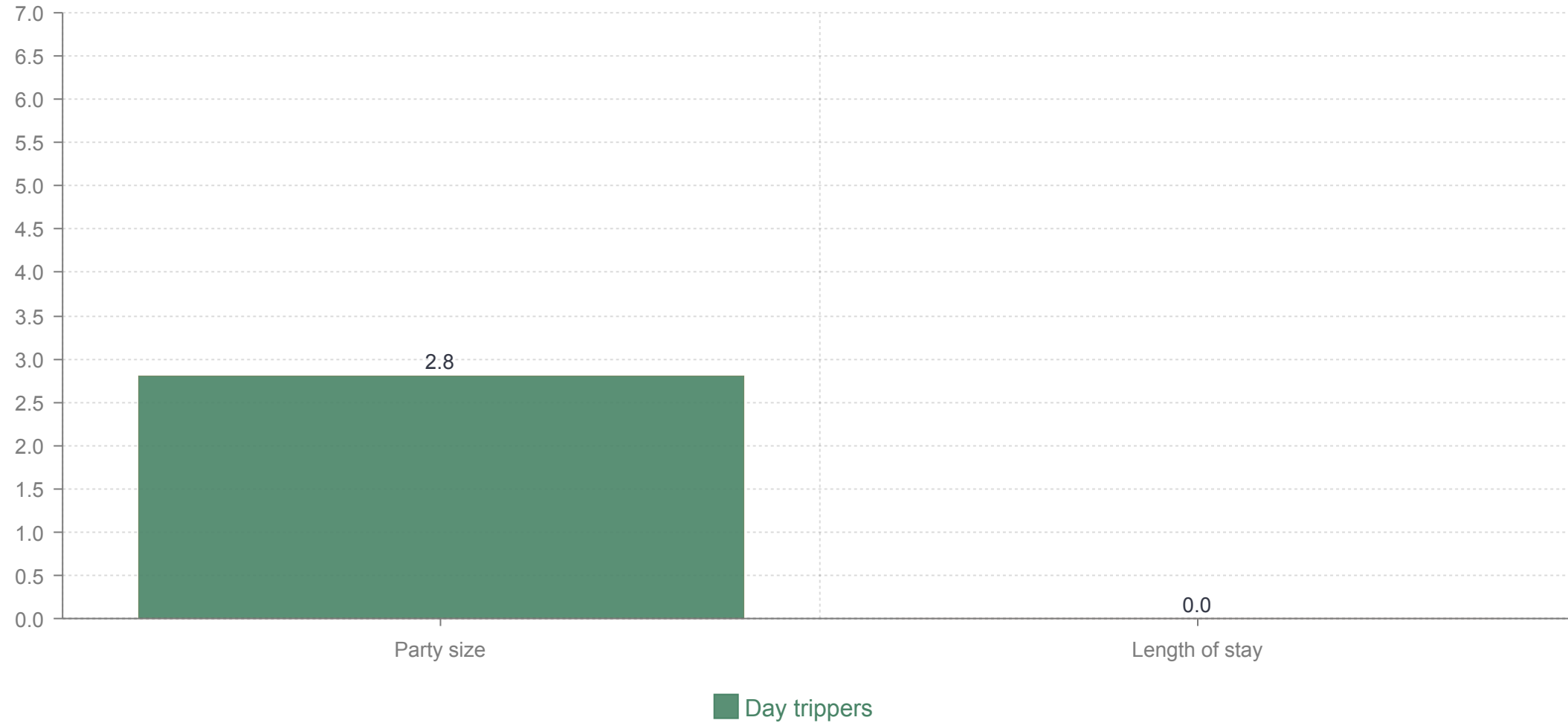
Essex County travelers



*2015 study not conducted

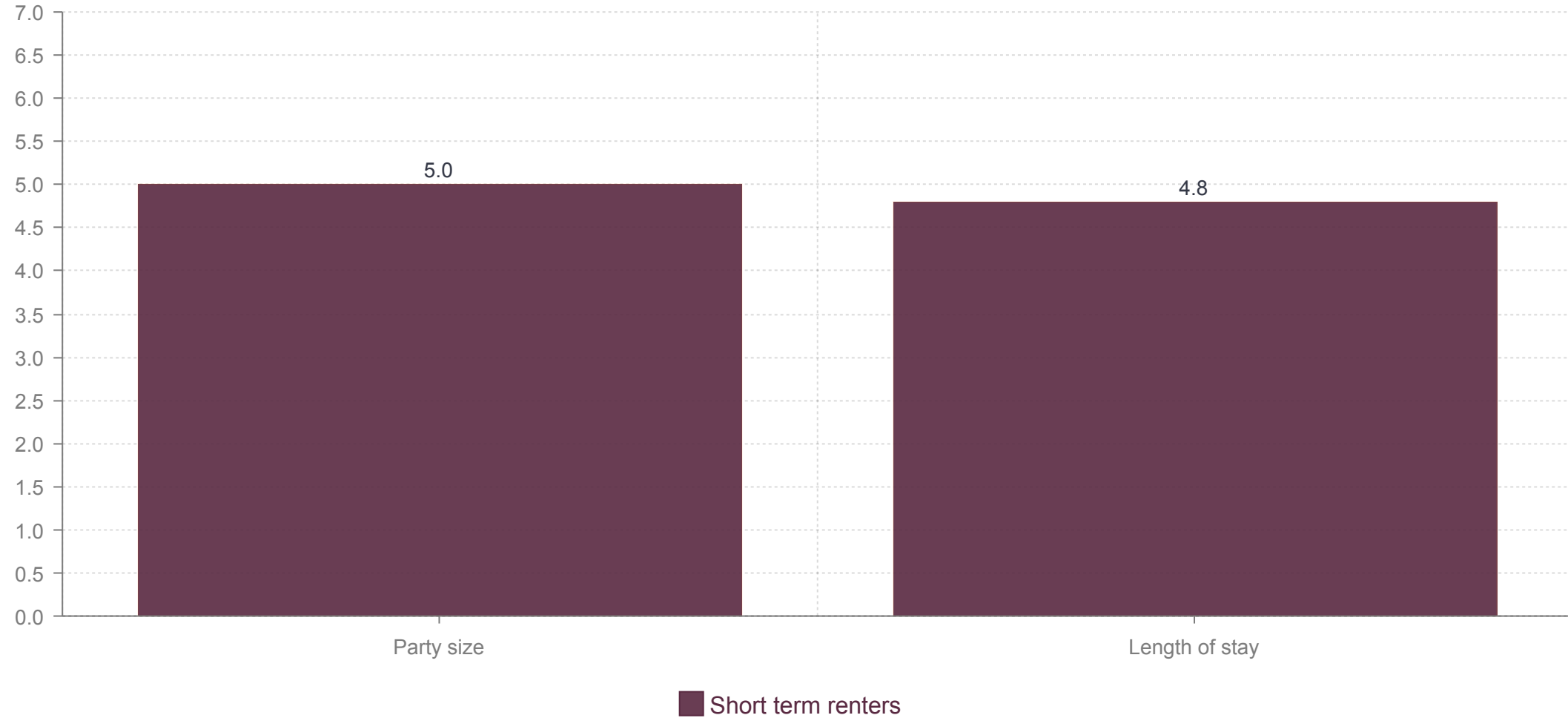
Party Size / Length of Stay

Day trippers



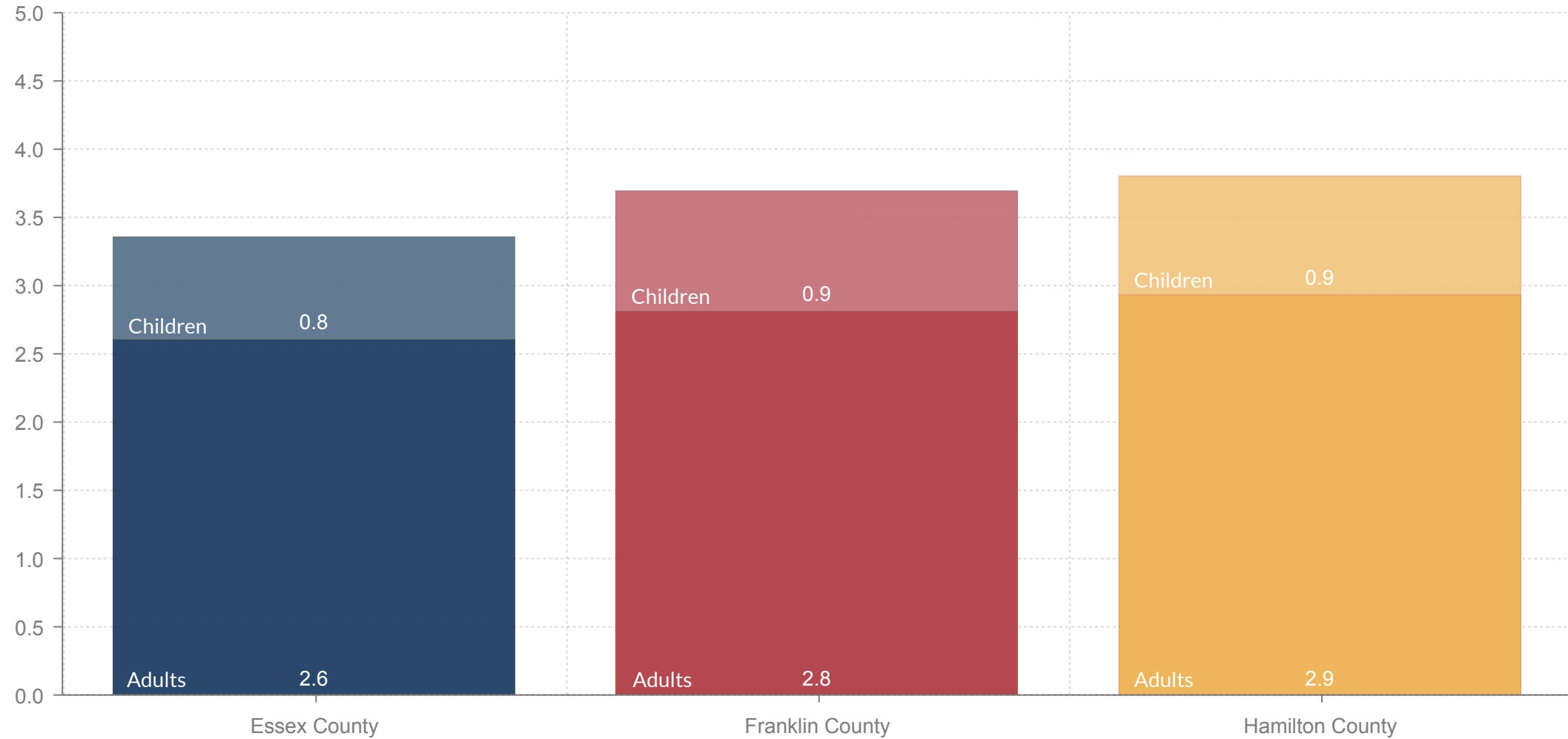
Party Size / Length of Stay

Short term renters



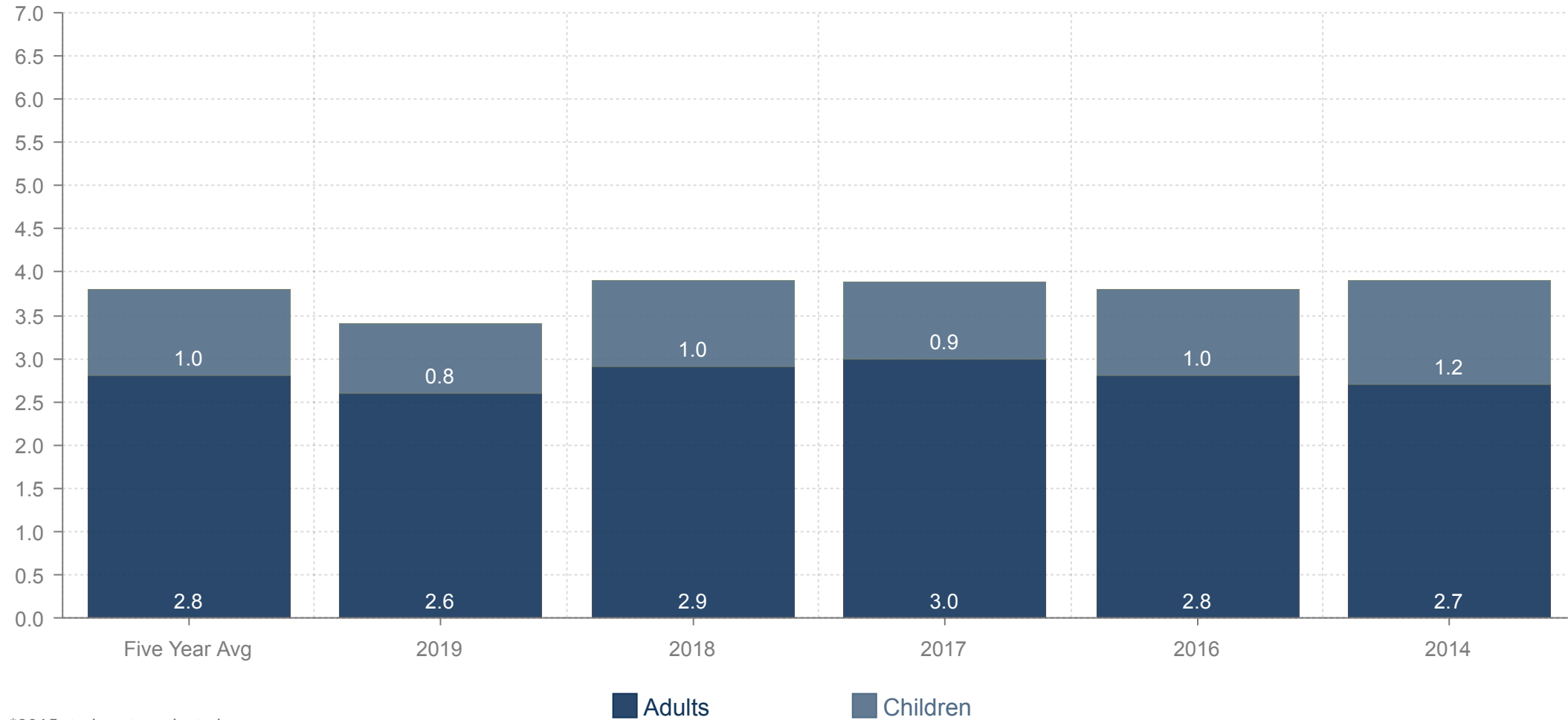
Party Composition

All travelers



Five Year Average Party Composition

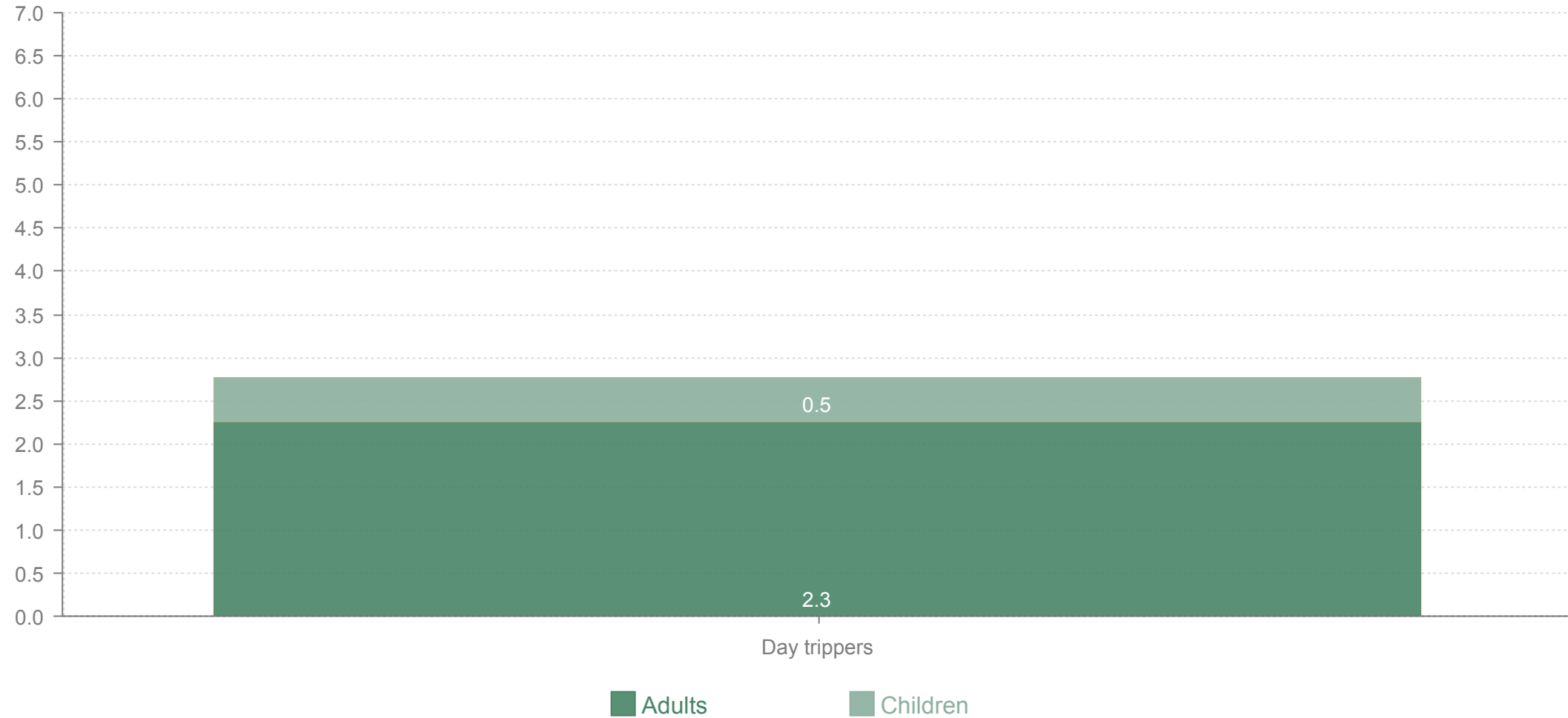
Essex County travelers



*2015 study not conducted

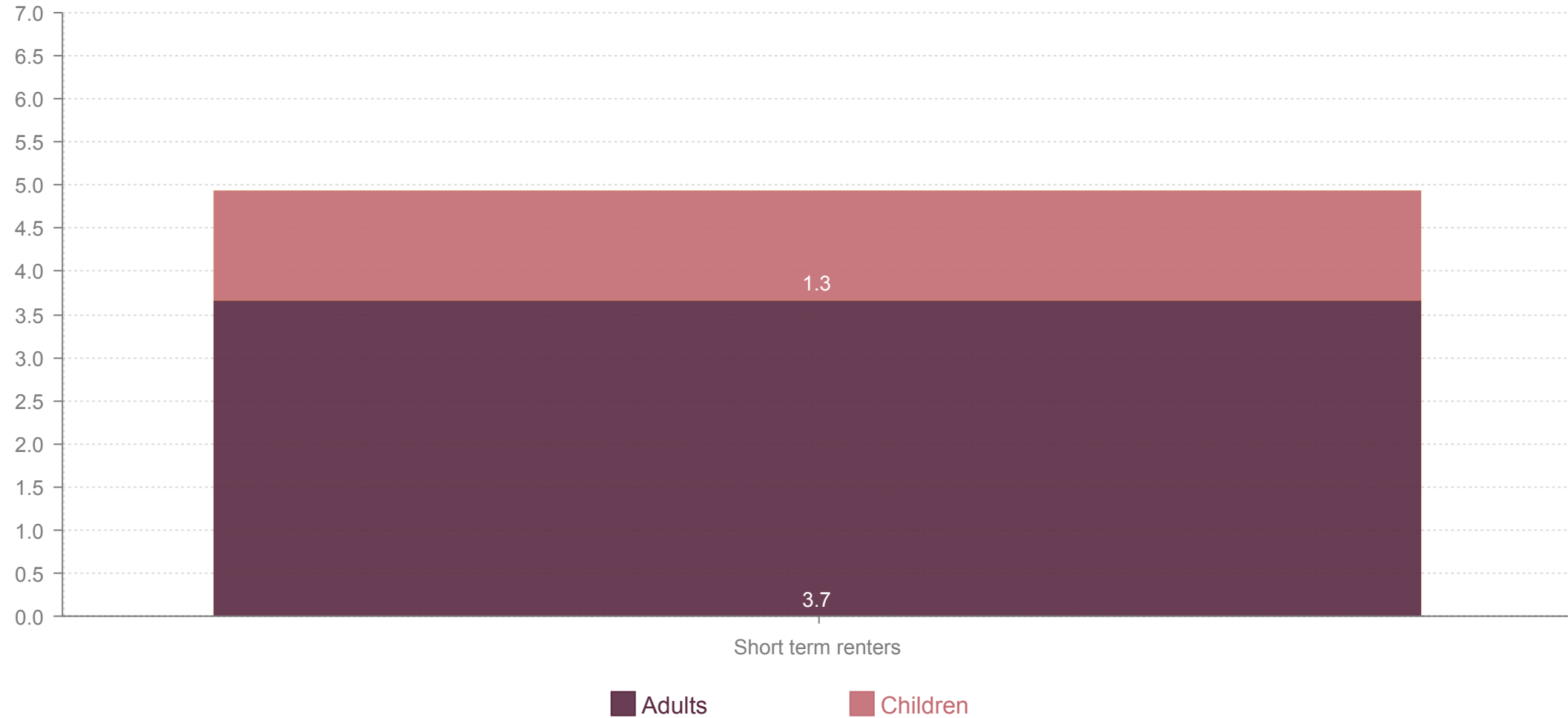
Party Composition

Day trippers



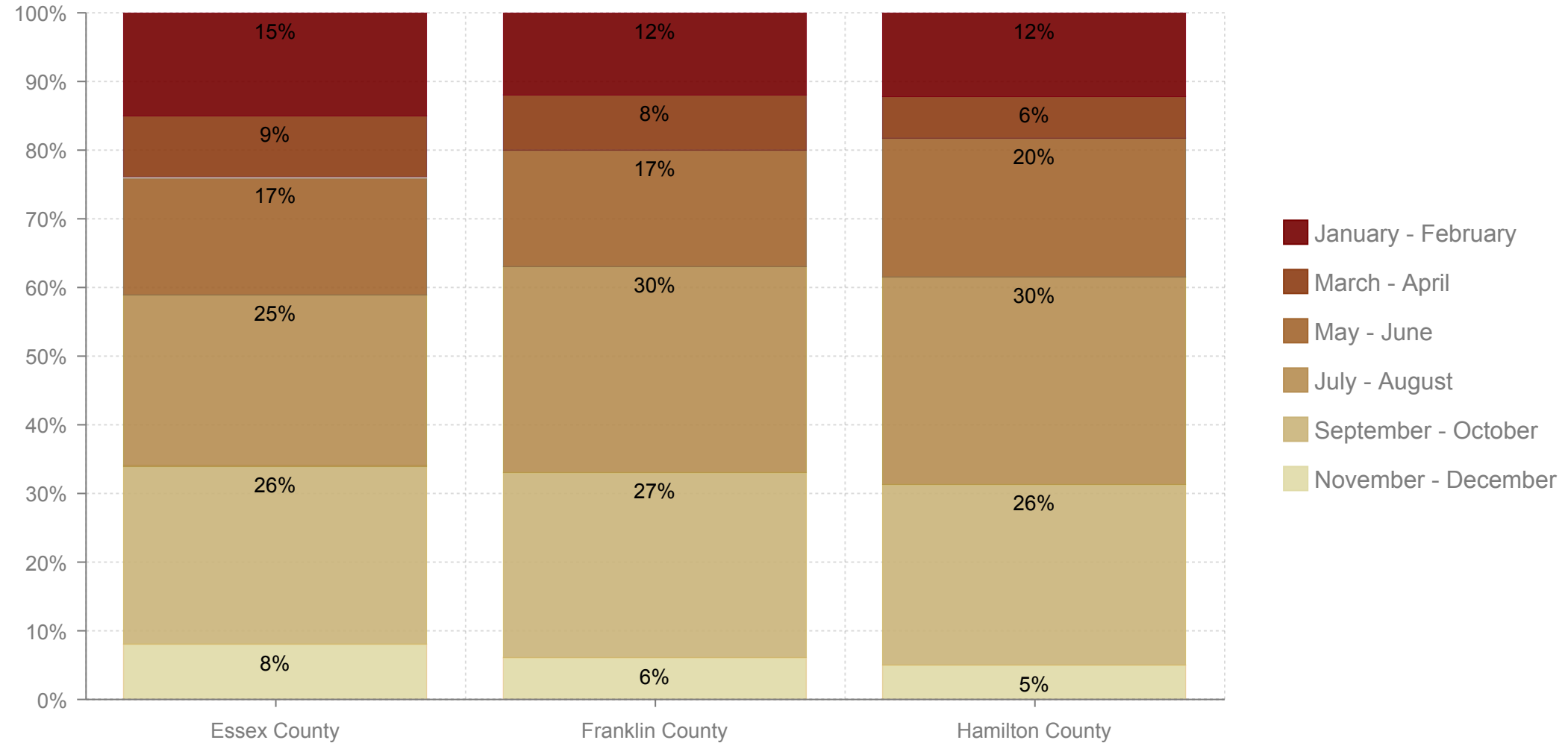
Party Composition

Short term renters



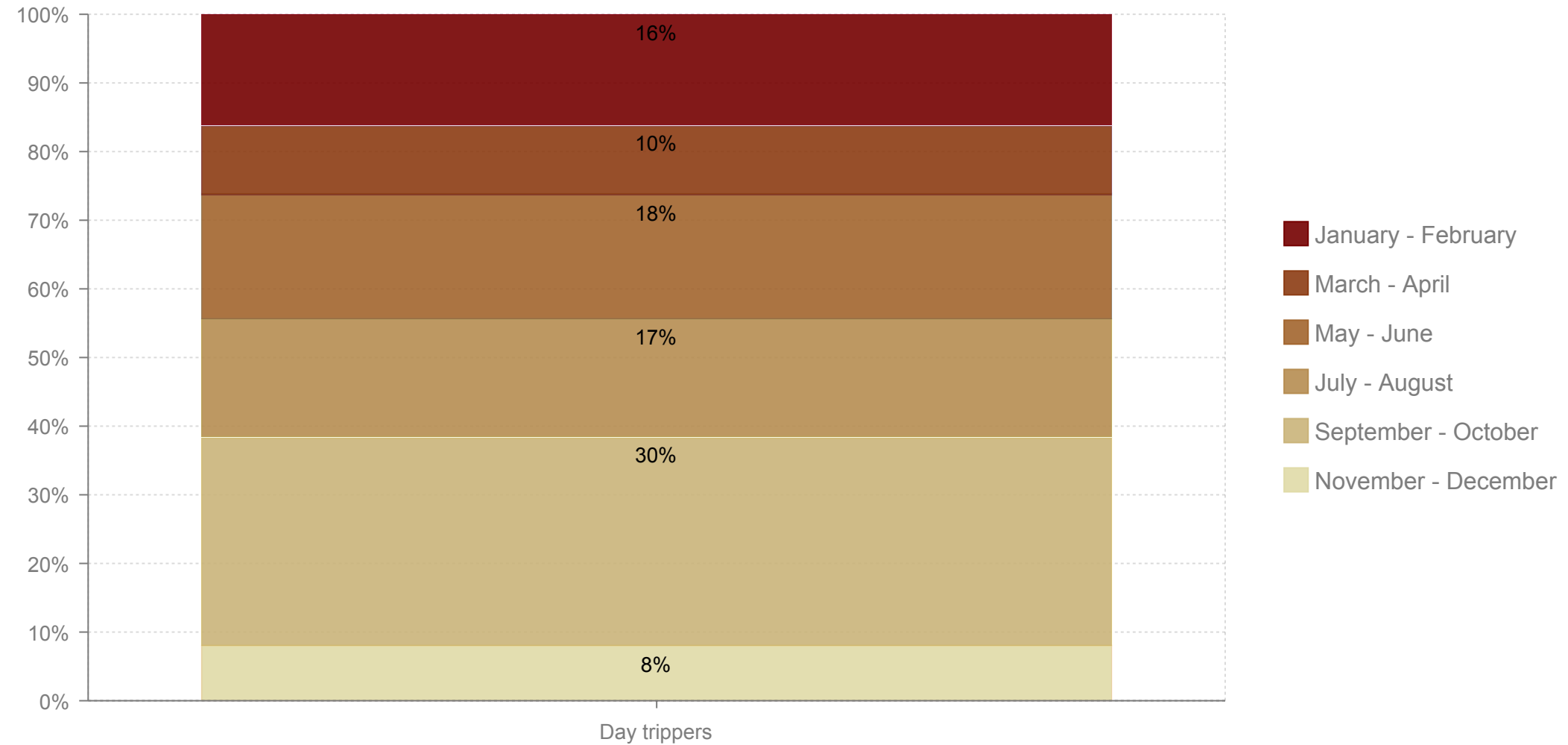
Time of Year Visited

All travelers



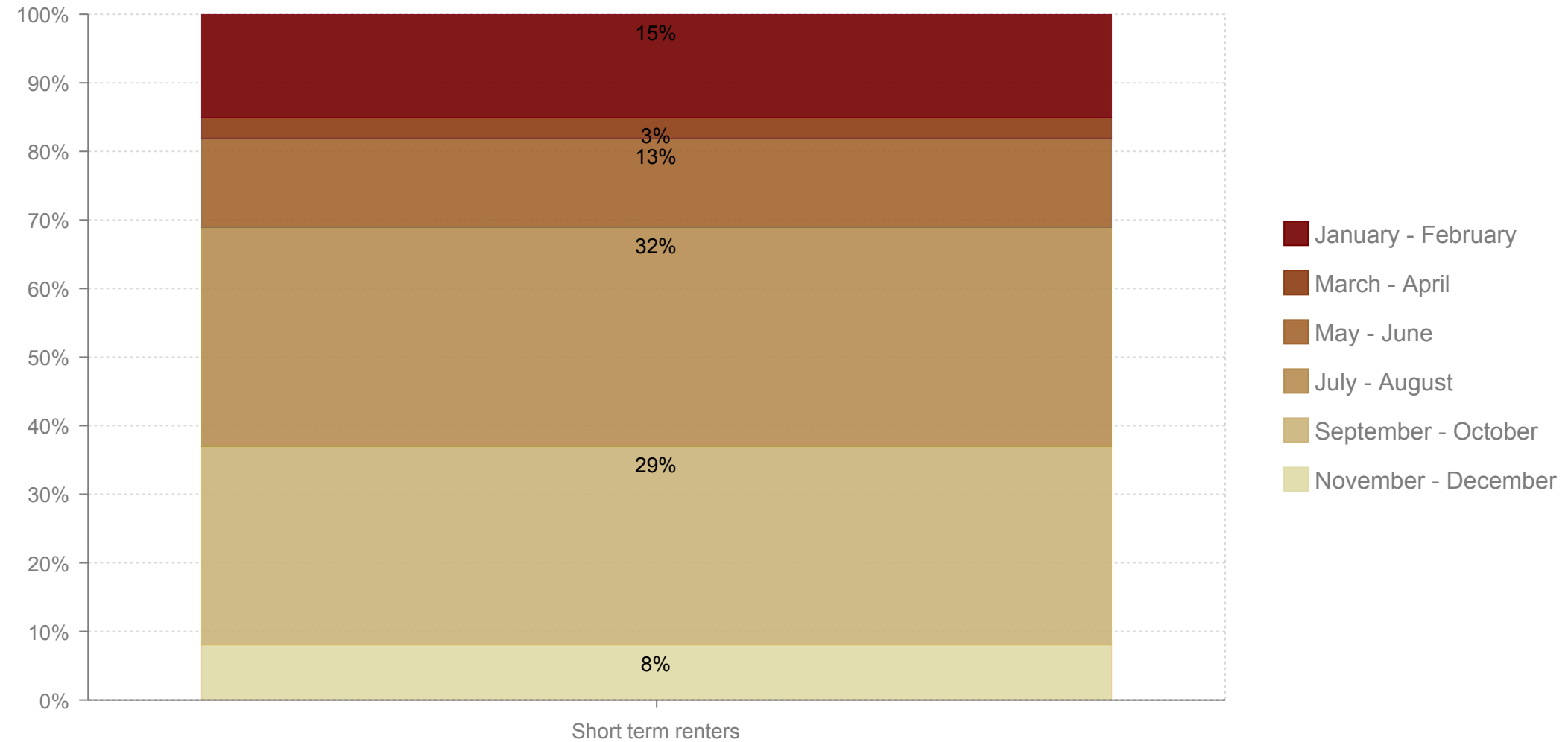
Time of Year Visited

Day trippers



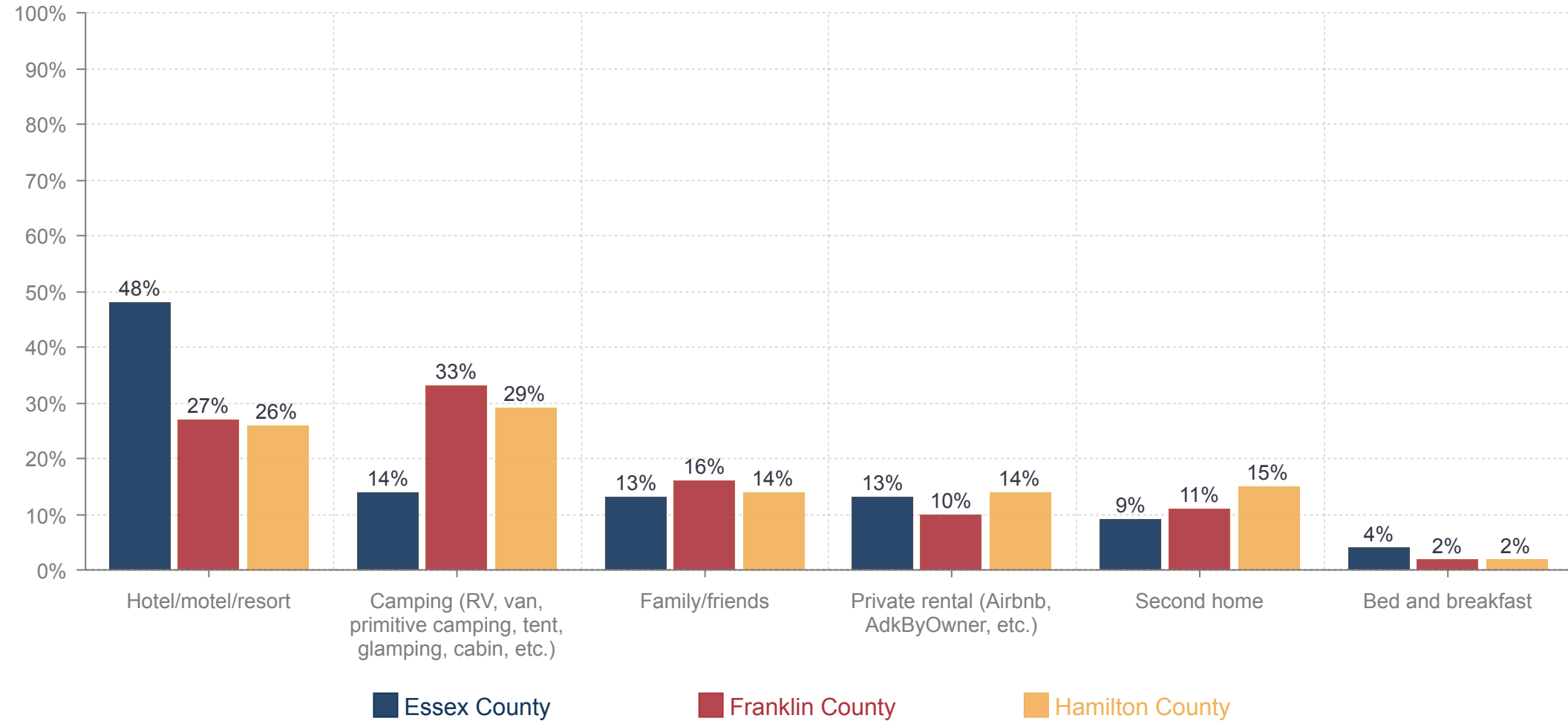
Time of Year Visited

Short term renters



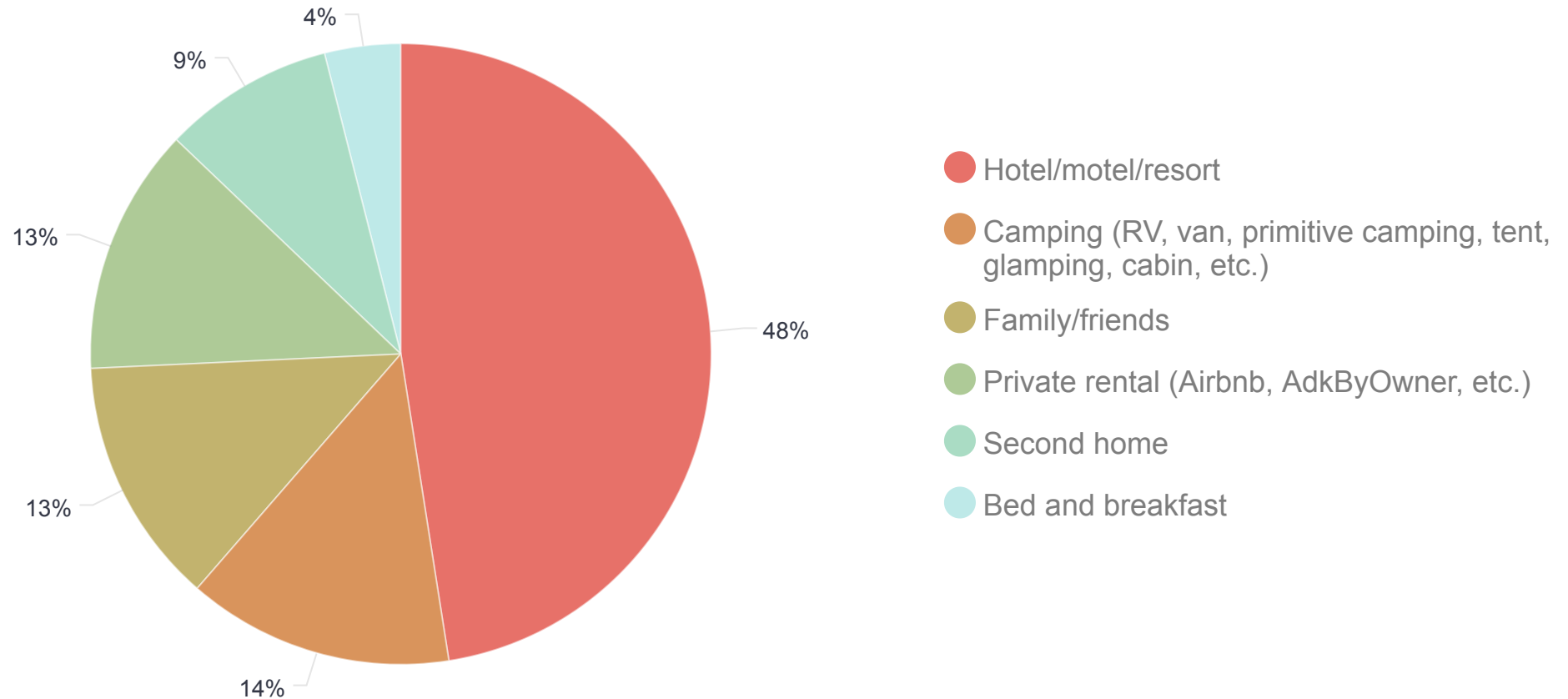
Lodging Accommodations

All travelers



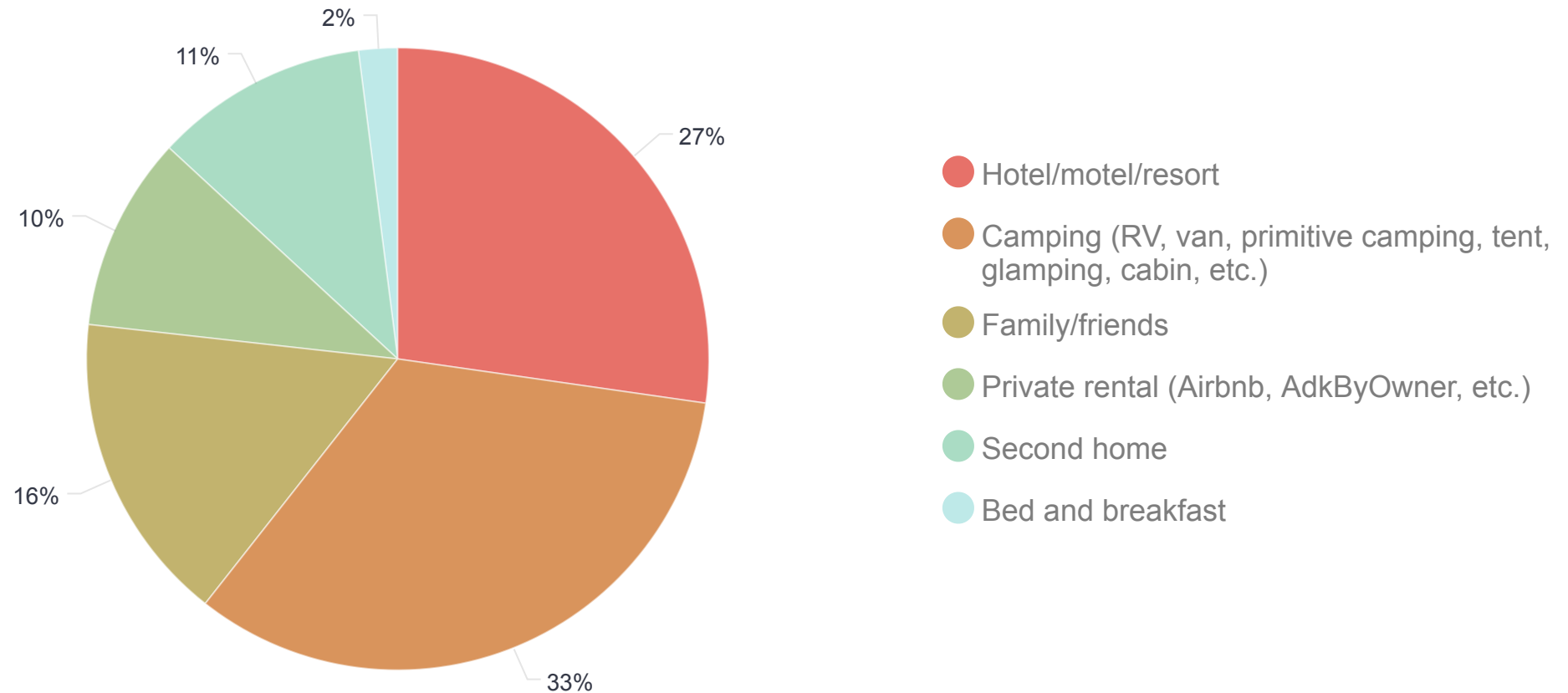
Lodging Accommodations

Essex County travelers



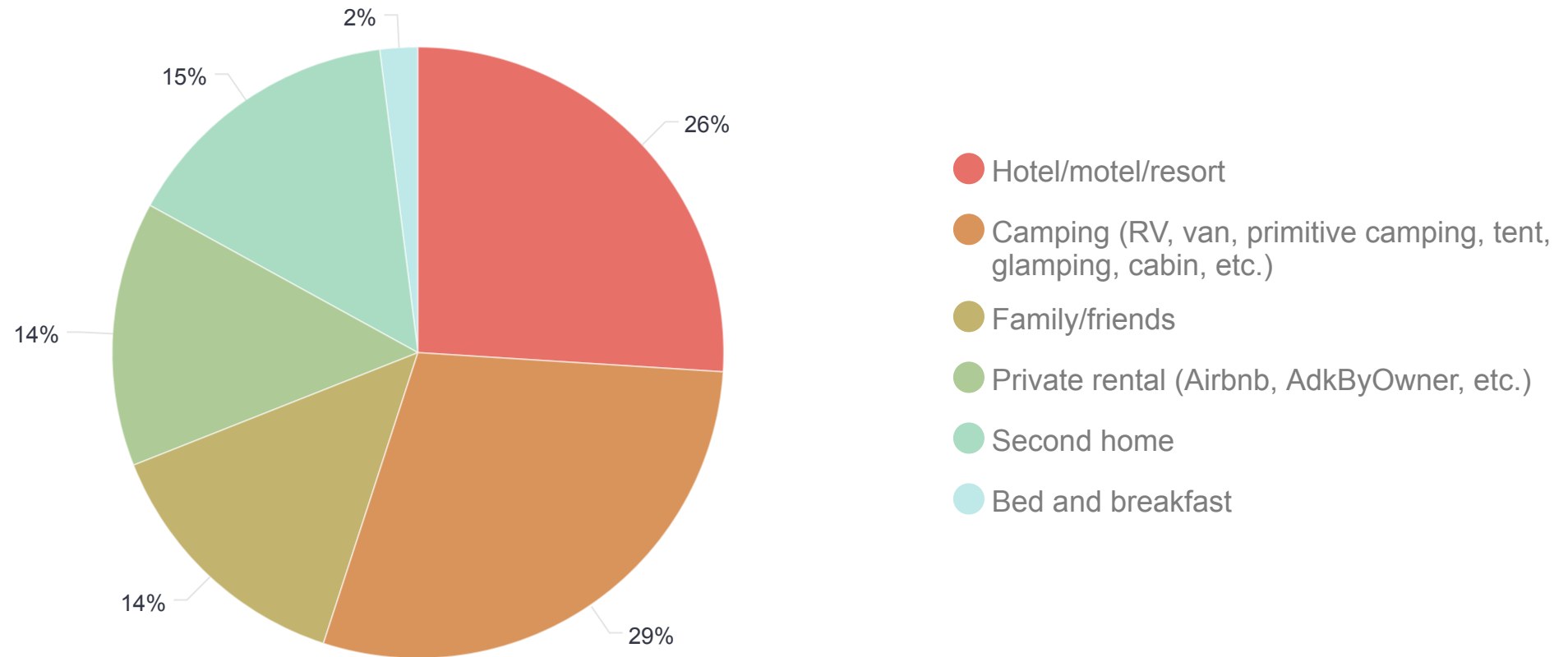
Lodging Accommodations

Franklin County travelers



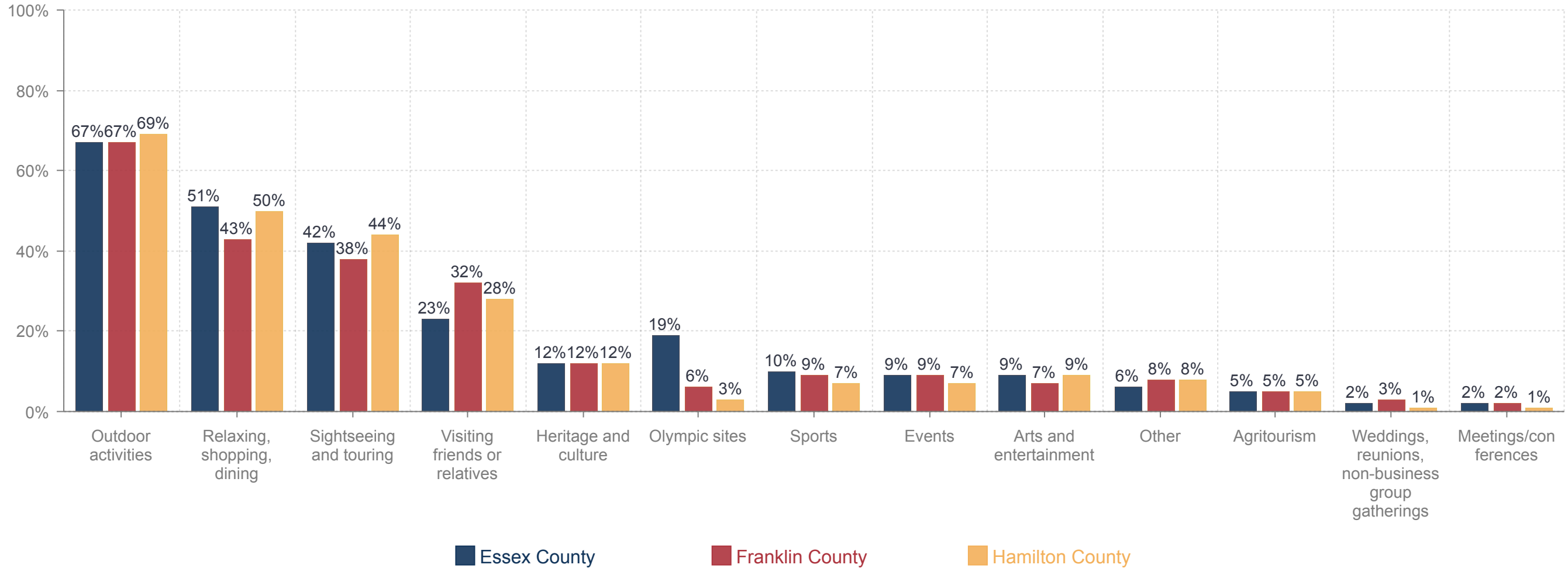
Lodging Accommodations

Hamilton County travelers



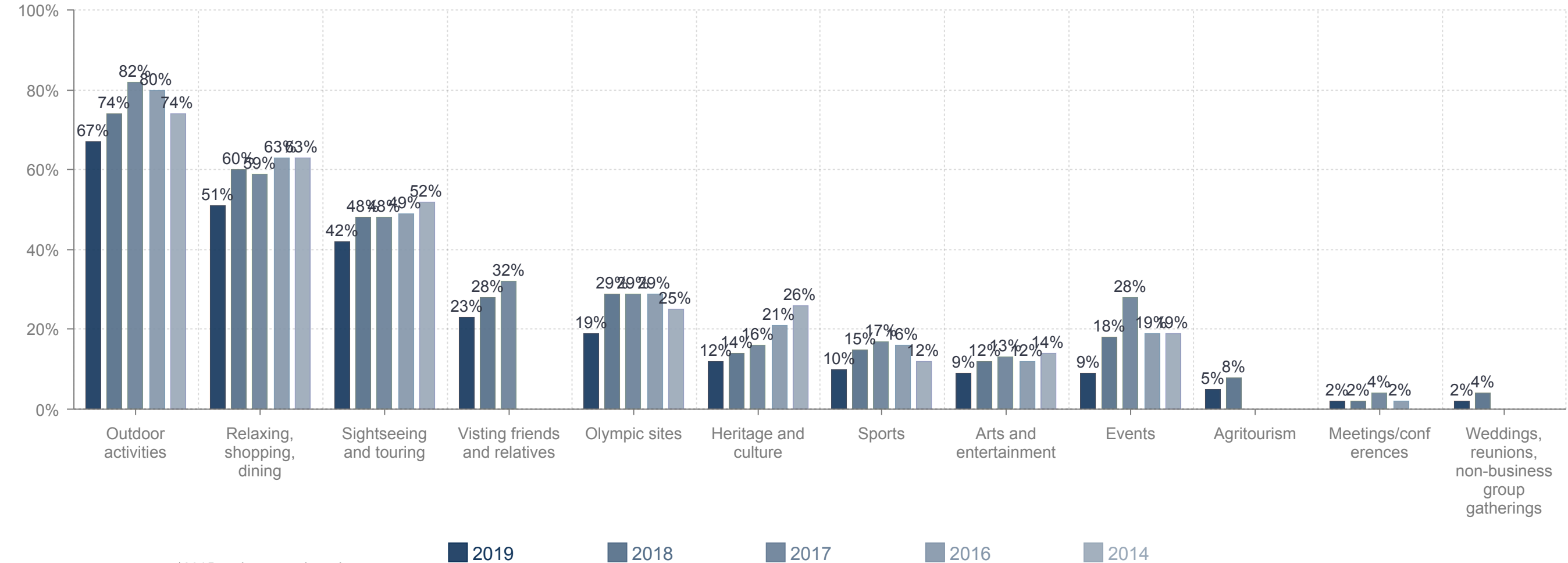
Key Attractions

All travelers



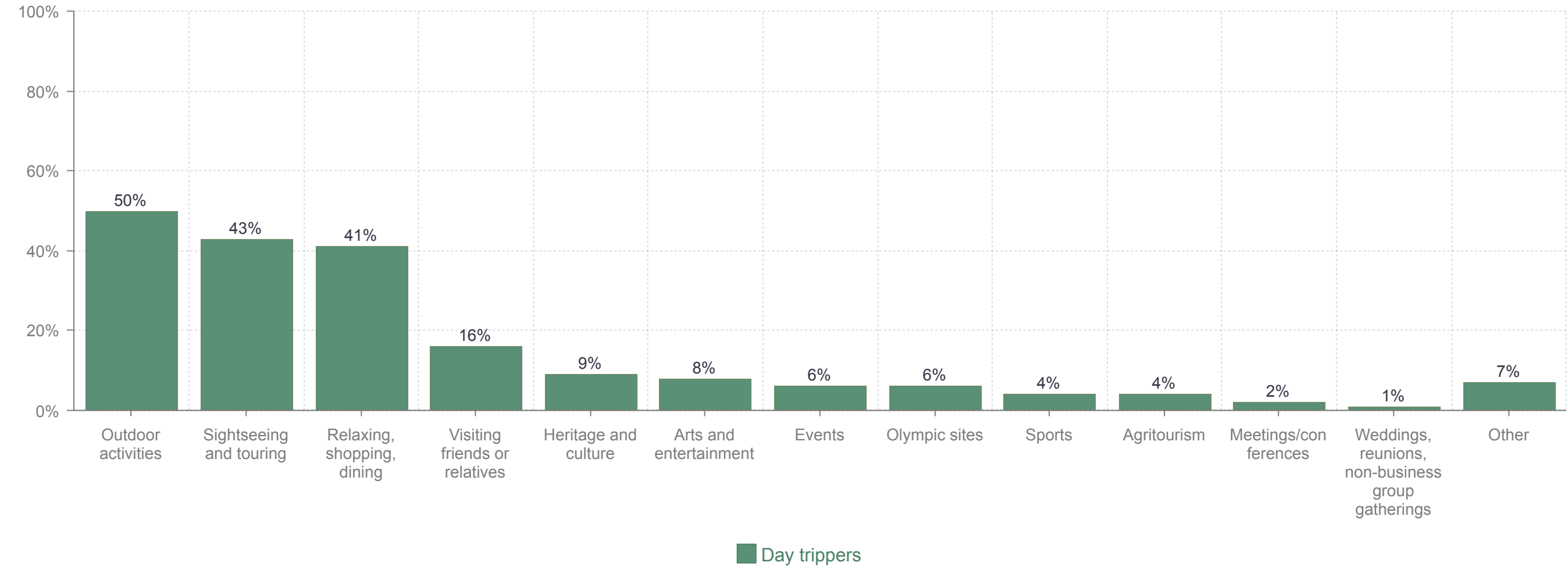
Five Year Key Attractions*

Essex County travelers



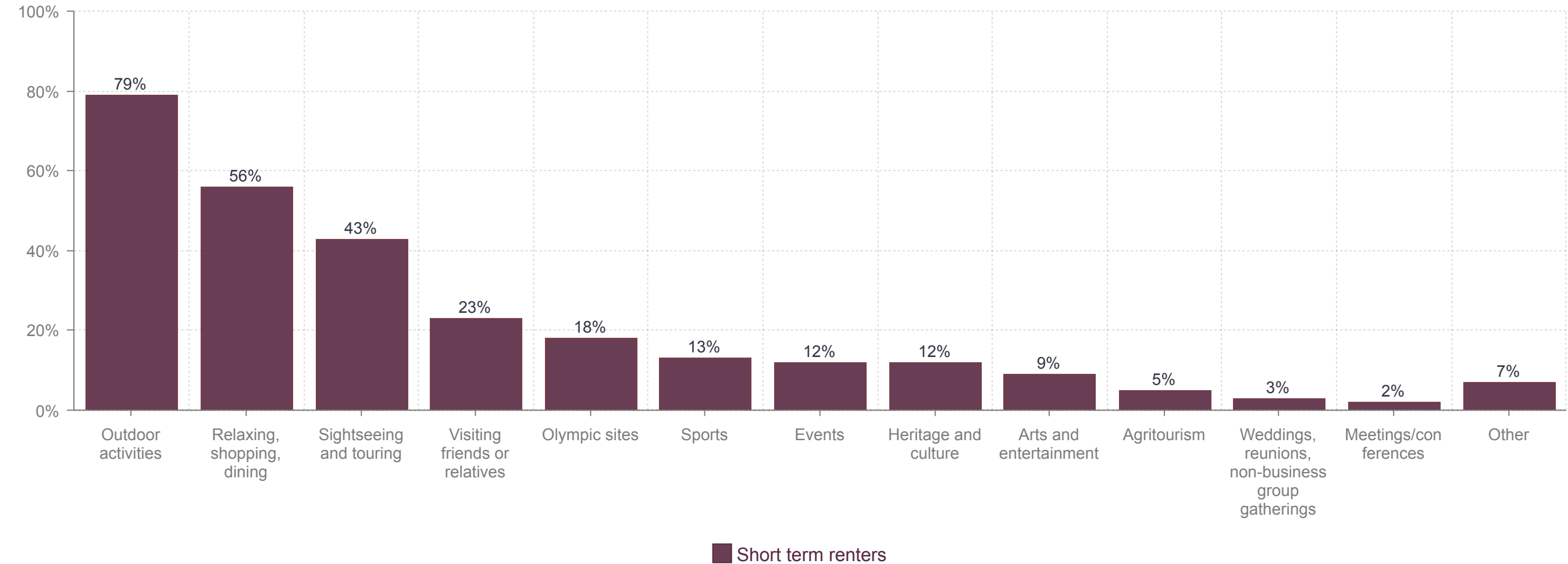
Key Attractions

Day trippers



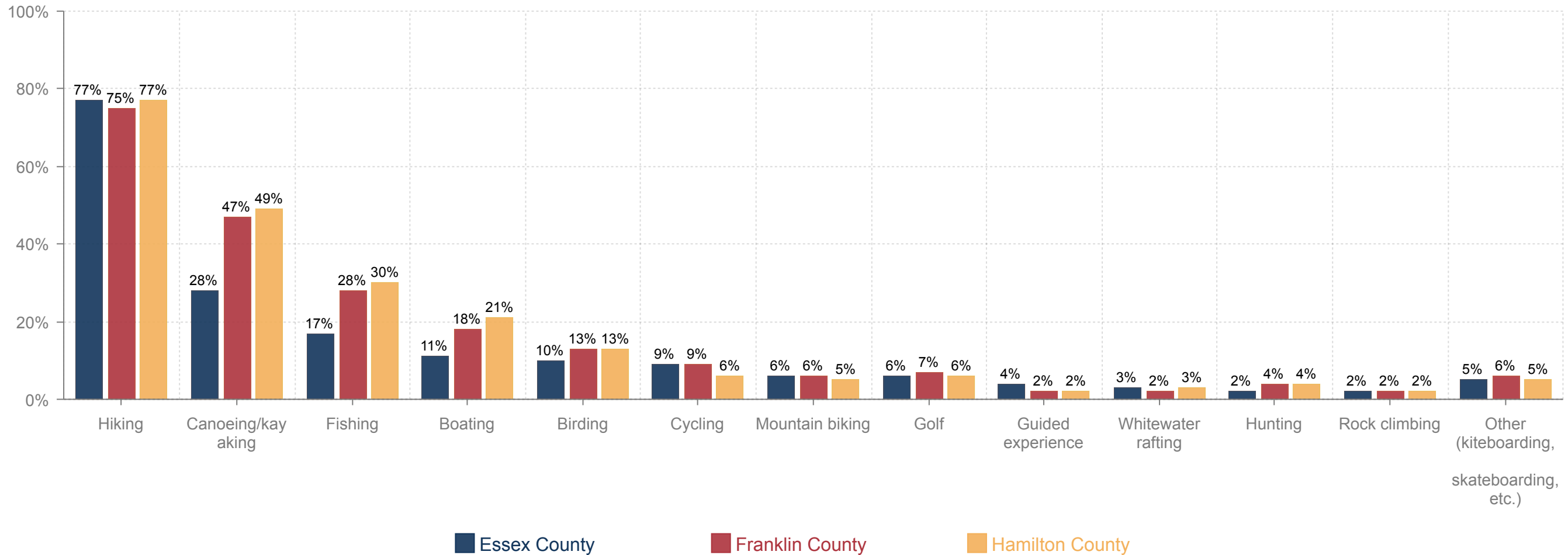
Key Attractions

Short term renters



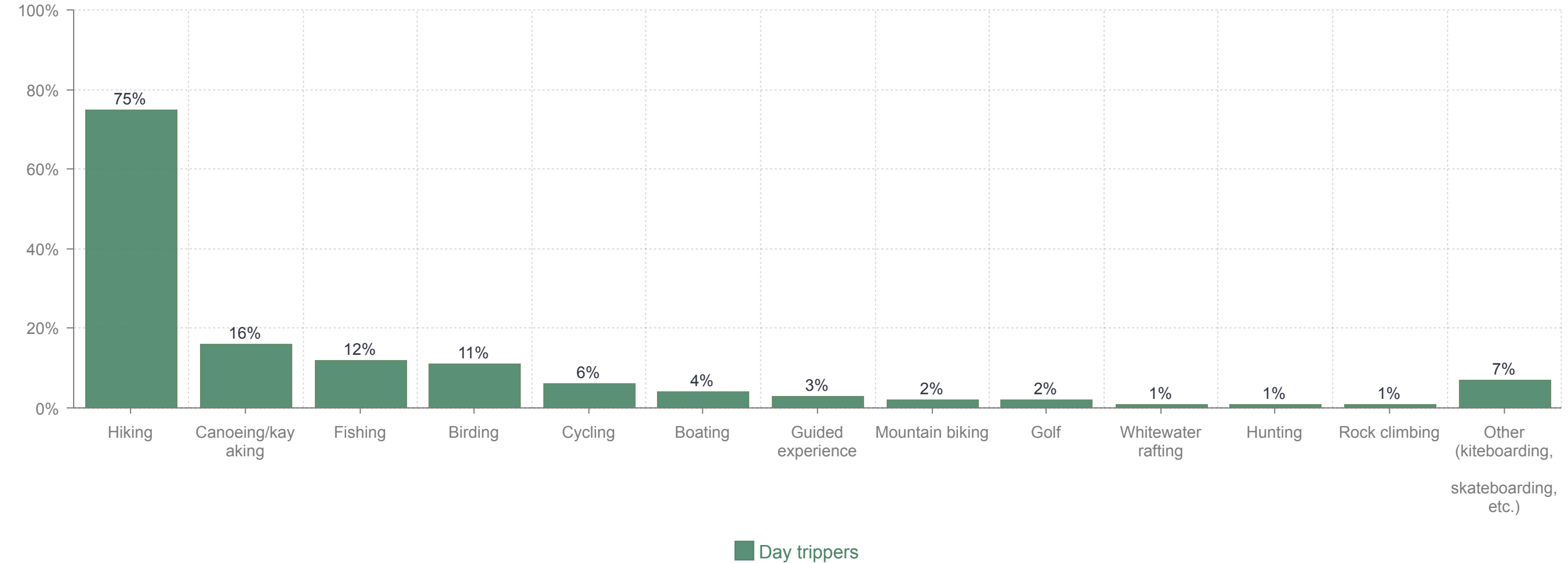
Outdoor Spring/Summer Activities

All travelers



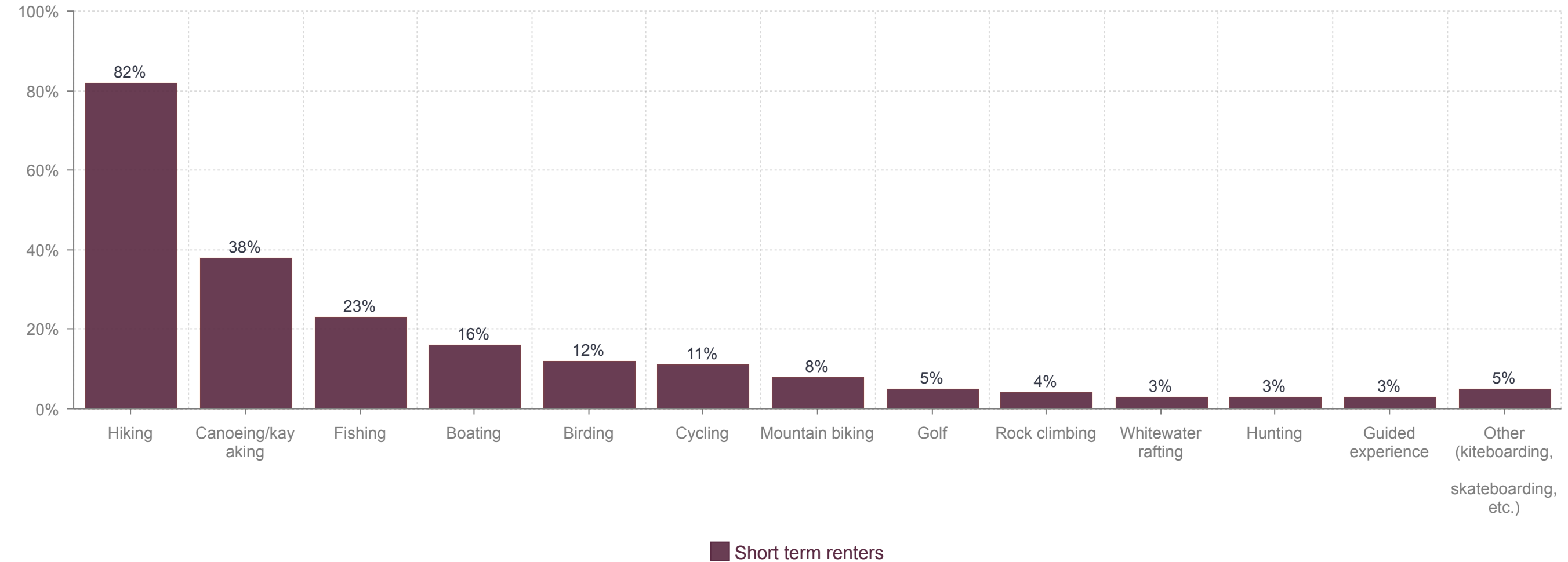
Outdoor Spring/Summer Activities

Day trippers



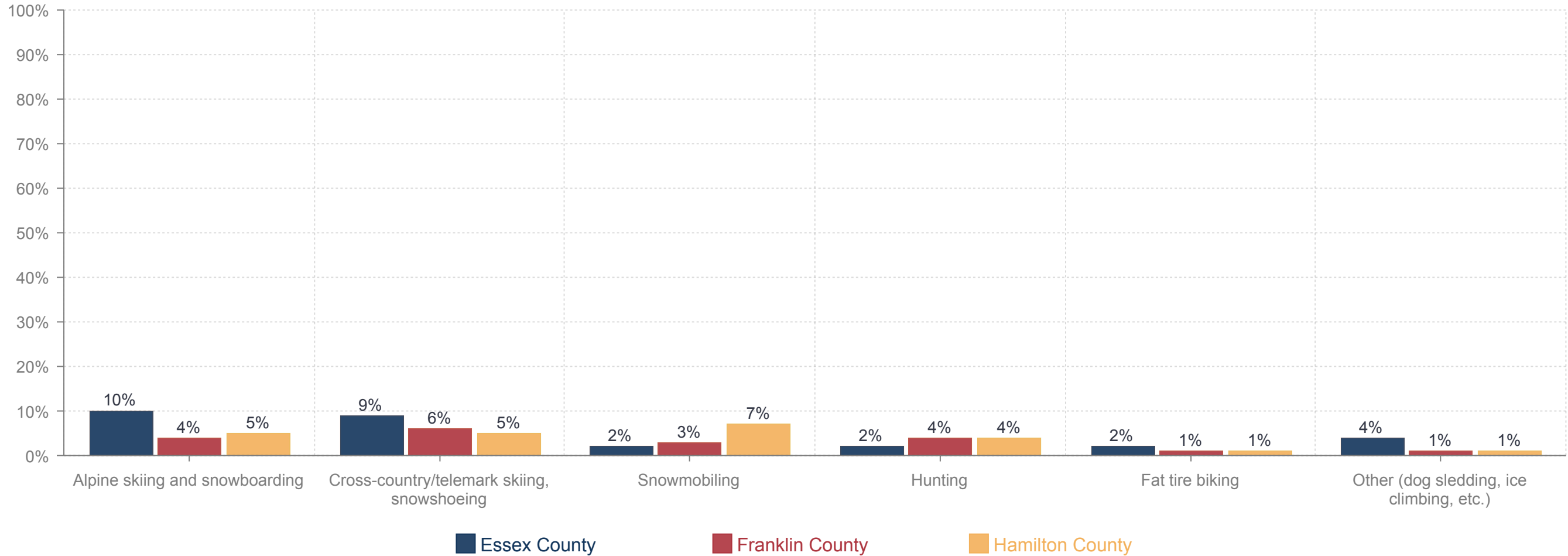
Outdoor Spring / Summer Activities

Short term renters



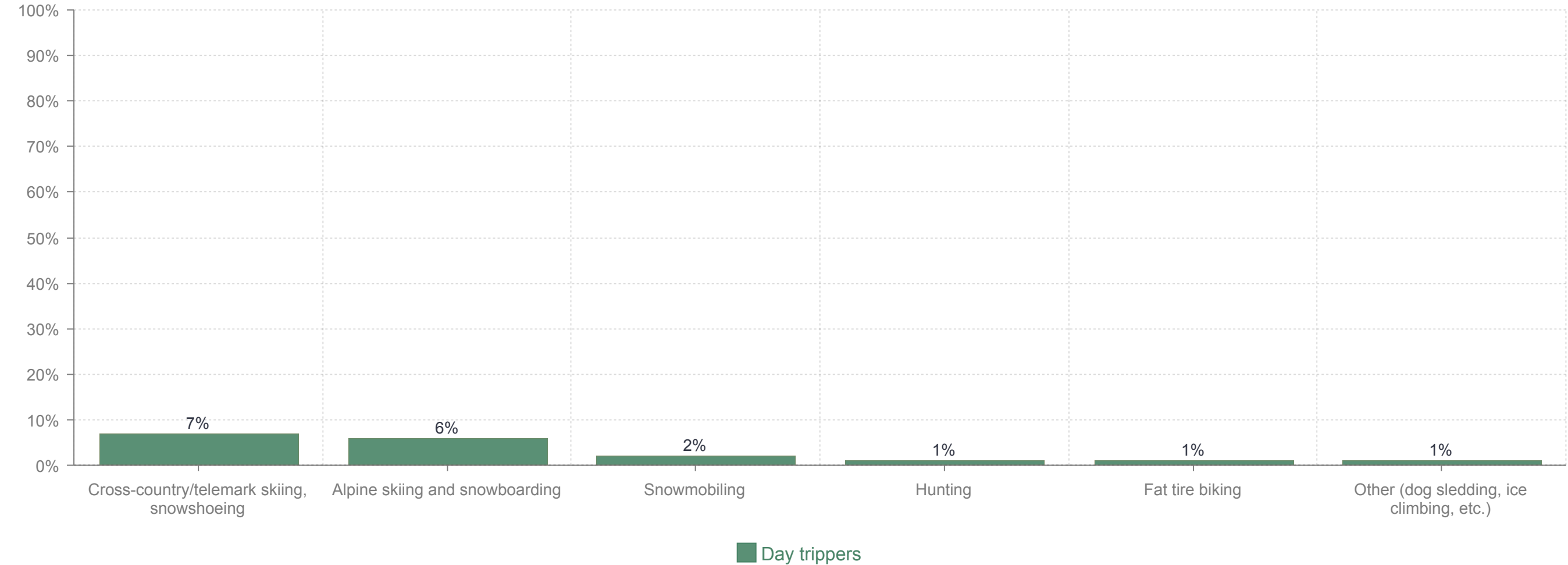
Outdoor Fall/Winter Activities

All travelers



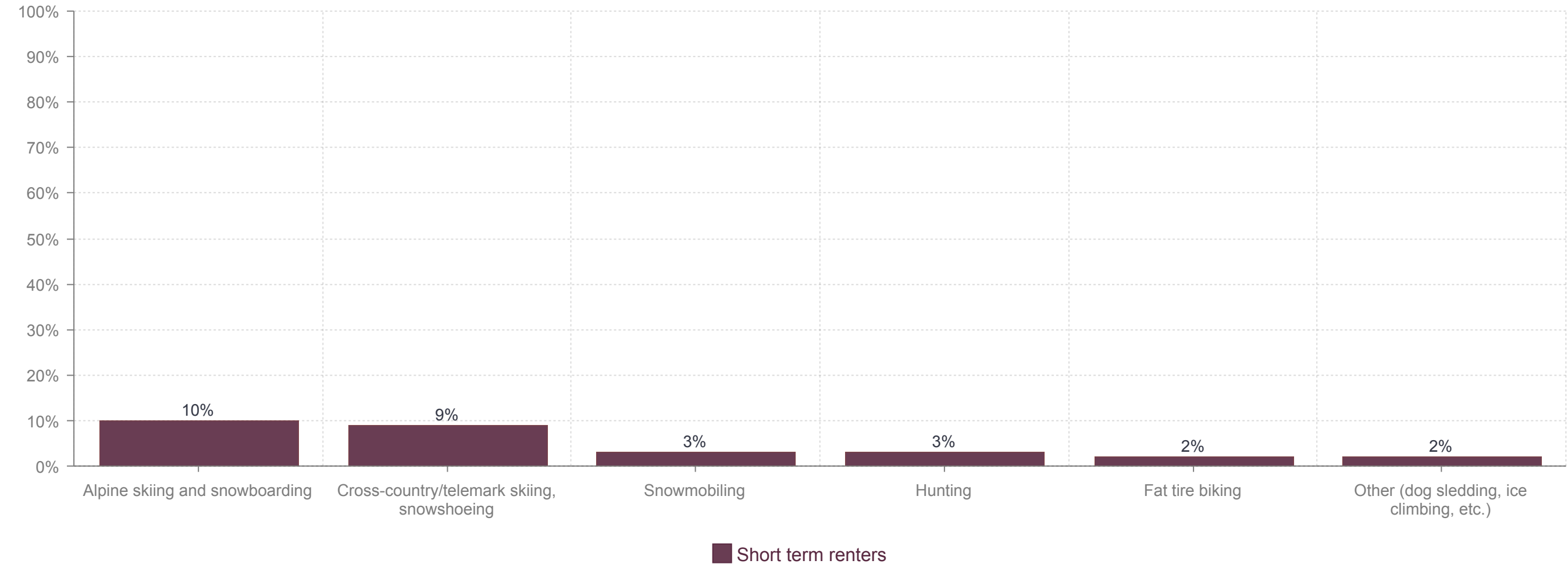
Outdoor Fall/Winter Activities

Day trippers



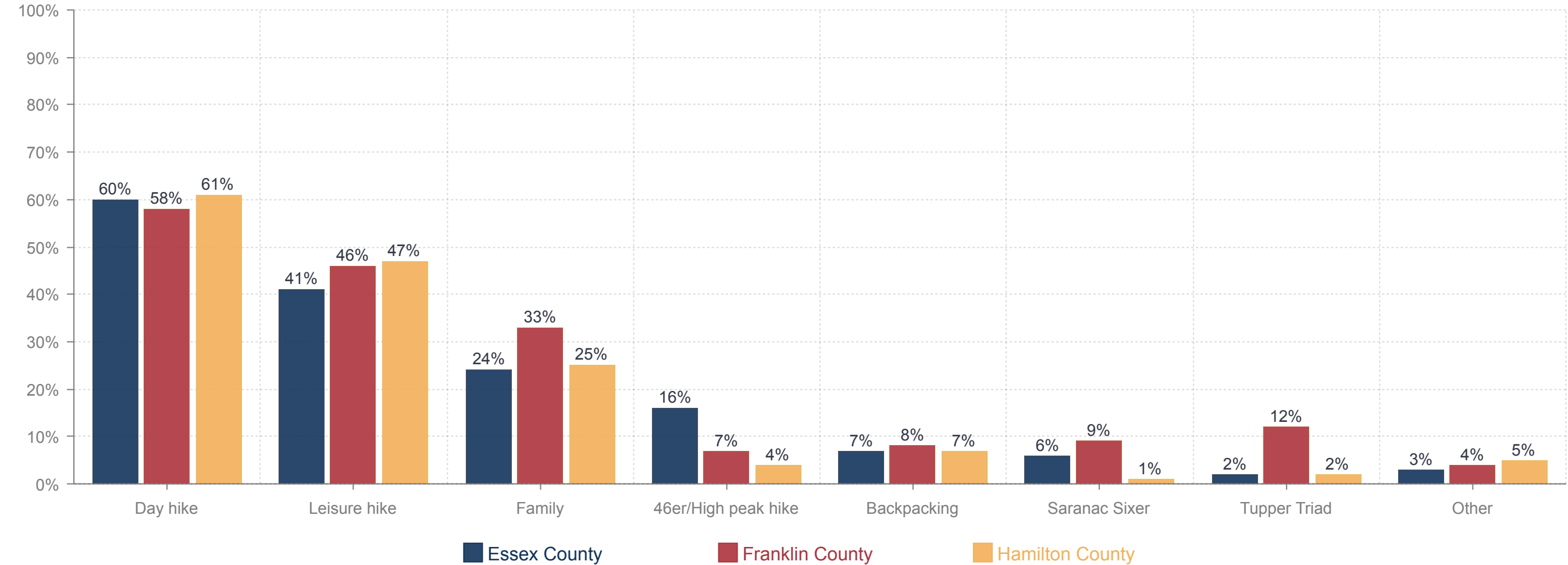
Outdoor Fall/Winter Activities

Short term renters



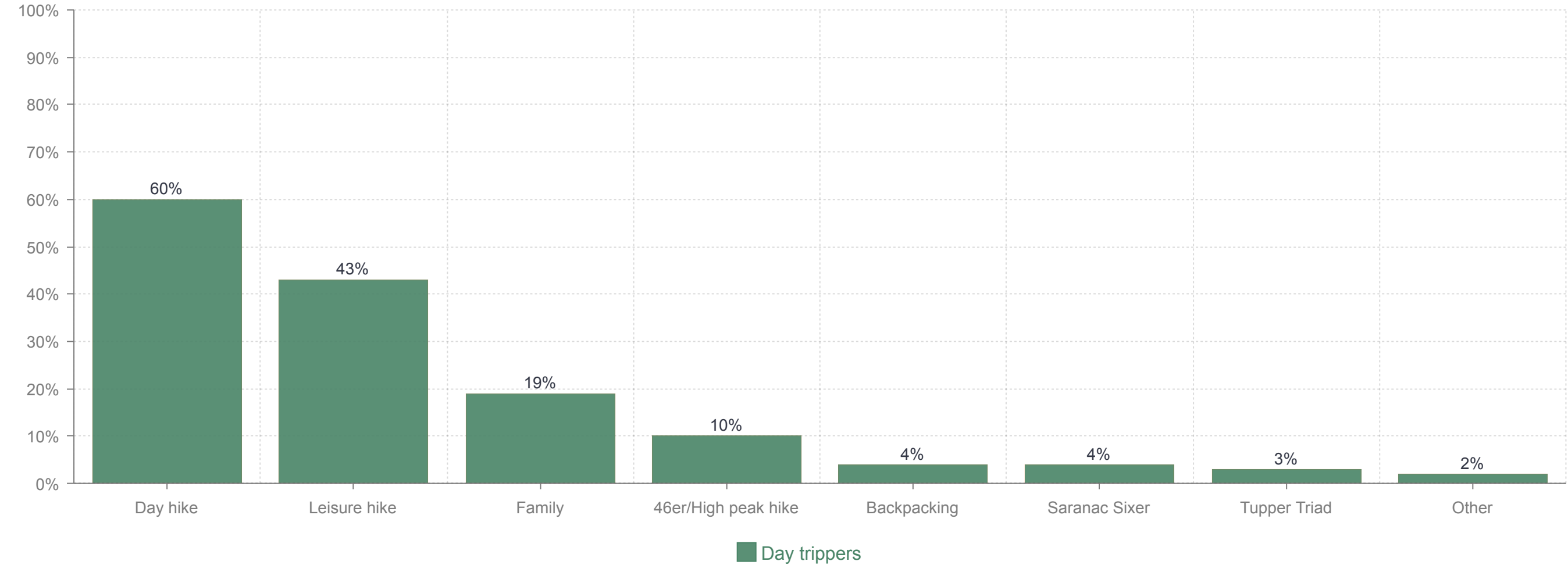
Hiking Breakdown

All travelers



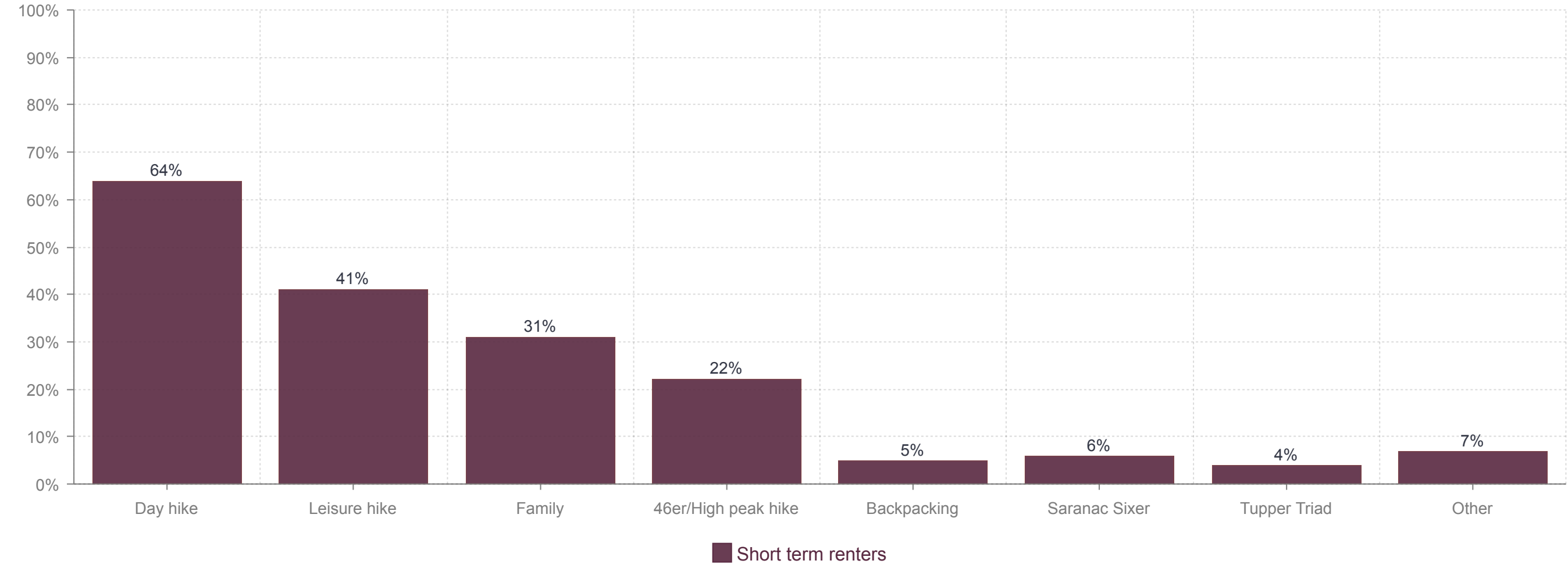
Hiking Breakdown

Day trippers



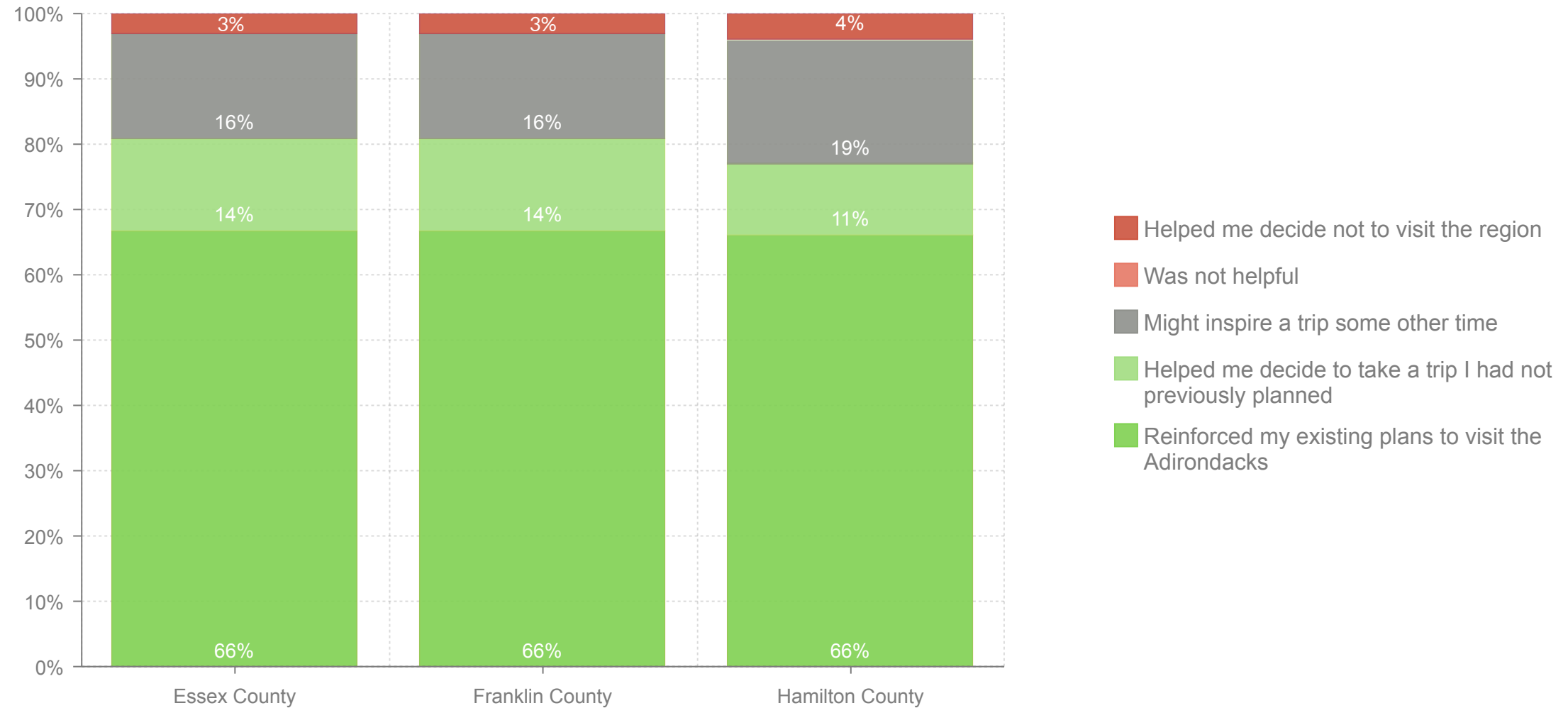
Hiking Breakdown

Short term renters



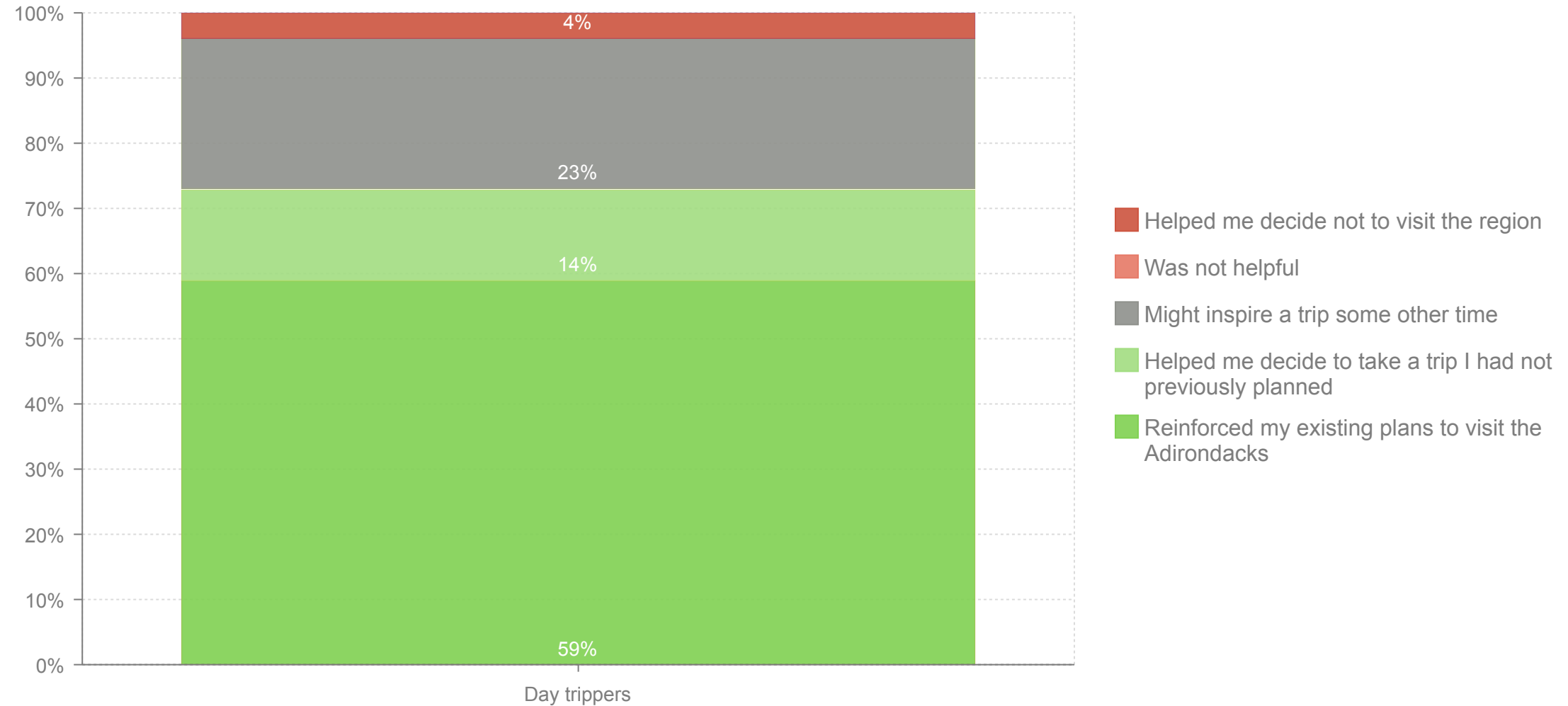
Conversion Rate from Viewing ROOST Marketing Materials

All travelers



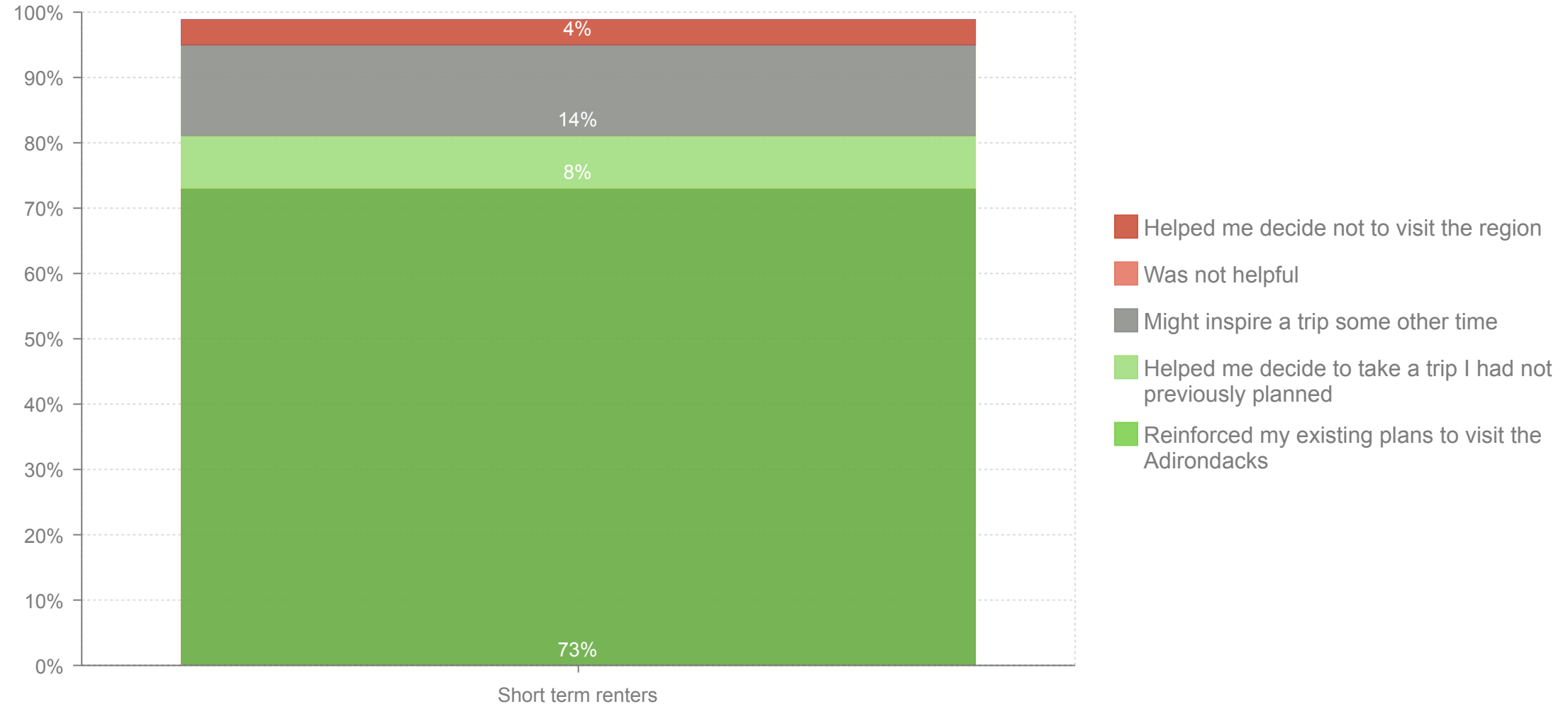
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers



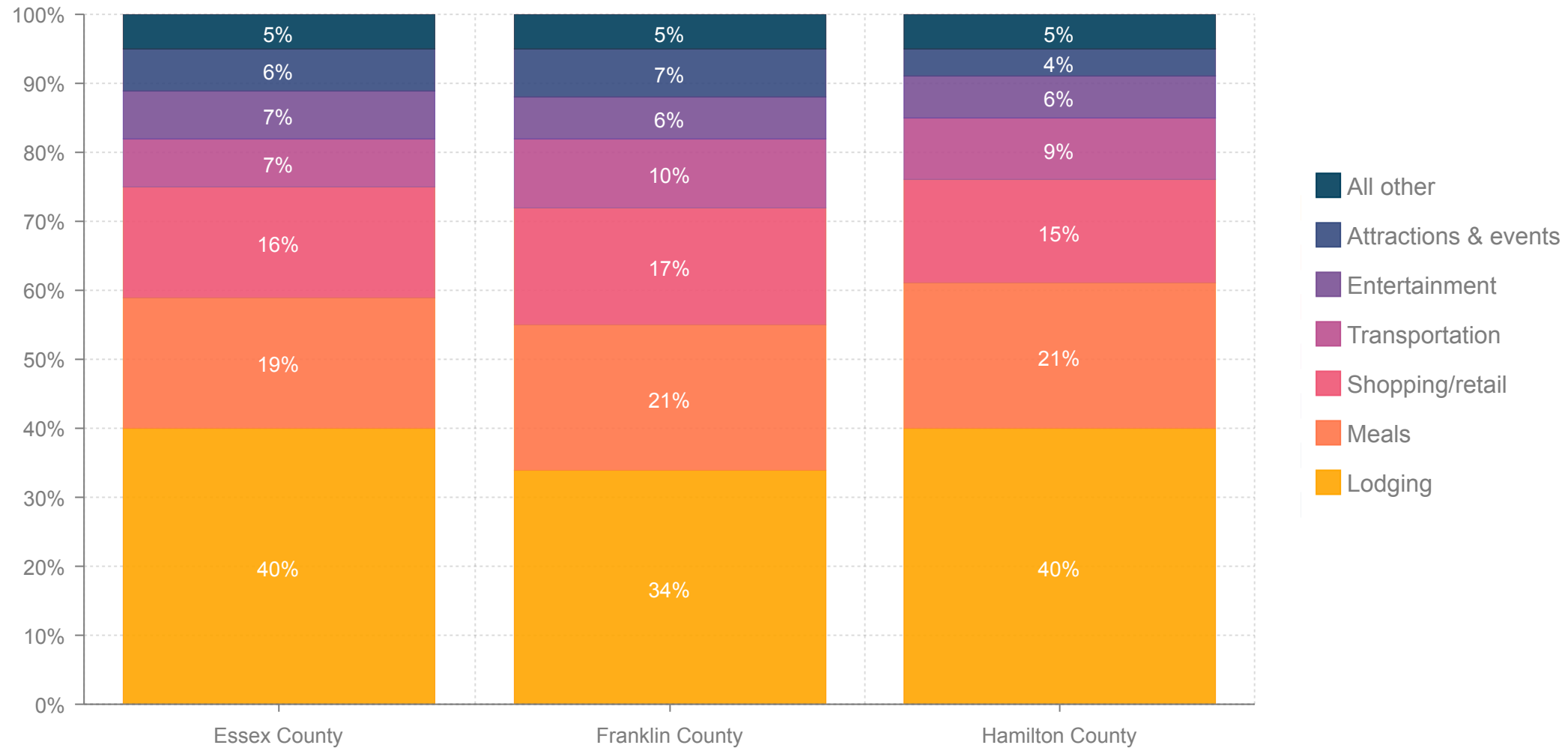
Conversion Rate from Viewing ROOST Marketing Materials

Short term renters



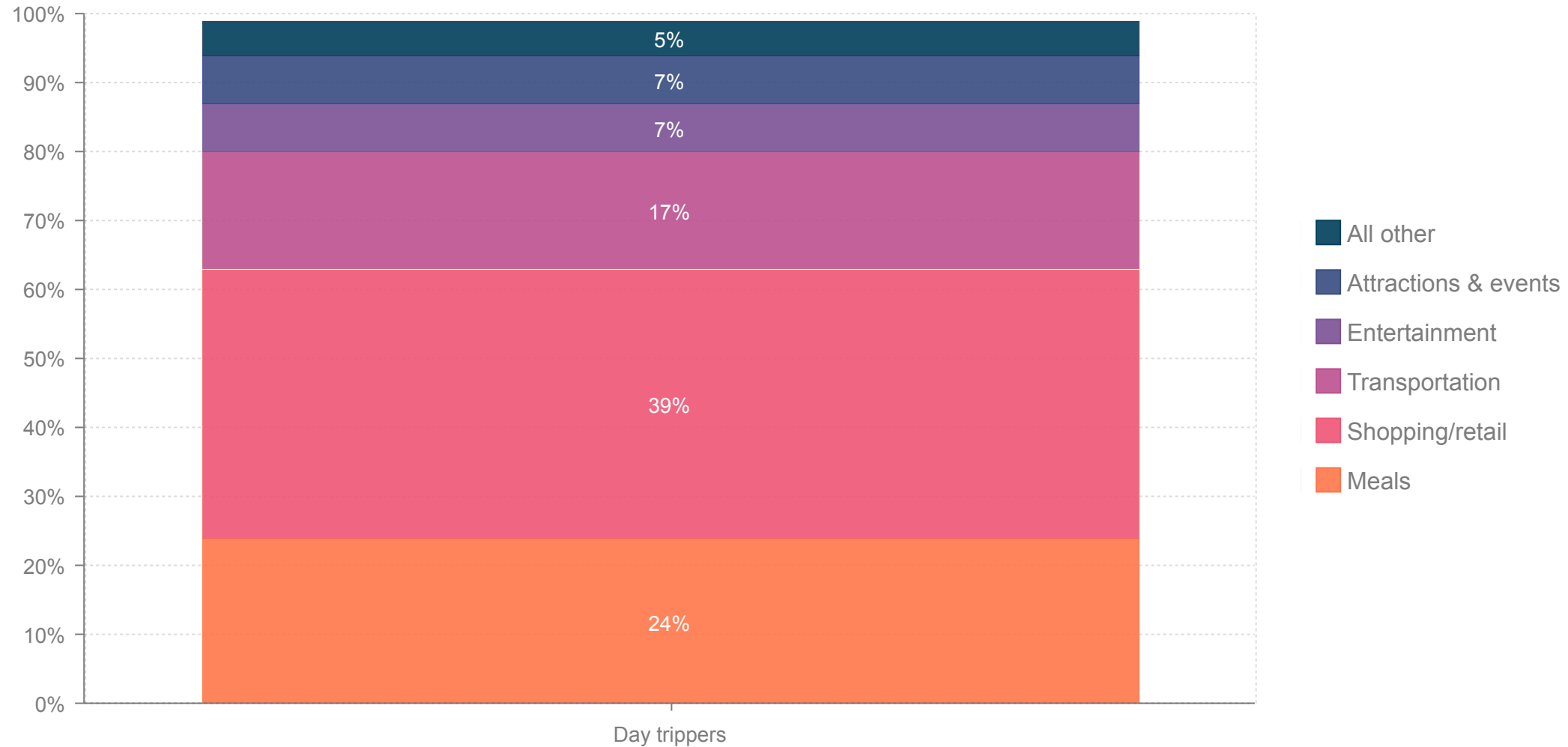
Total Expenditure Allocation by Category

All travelers



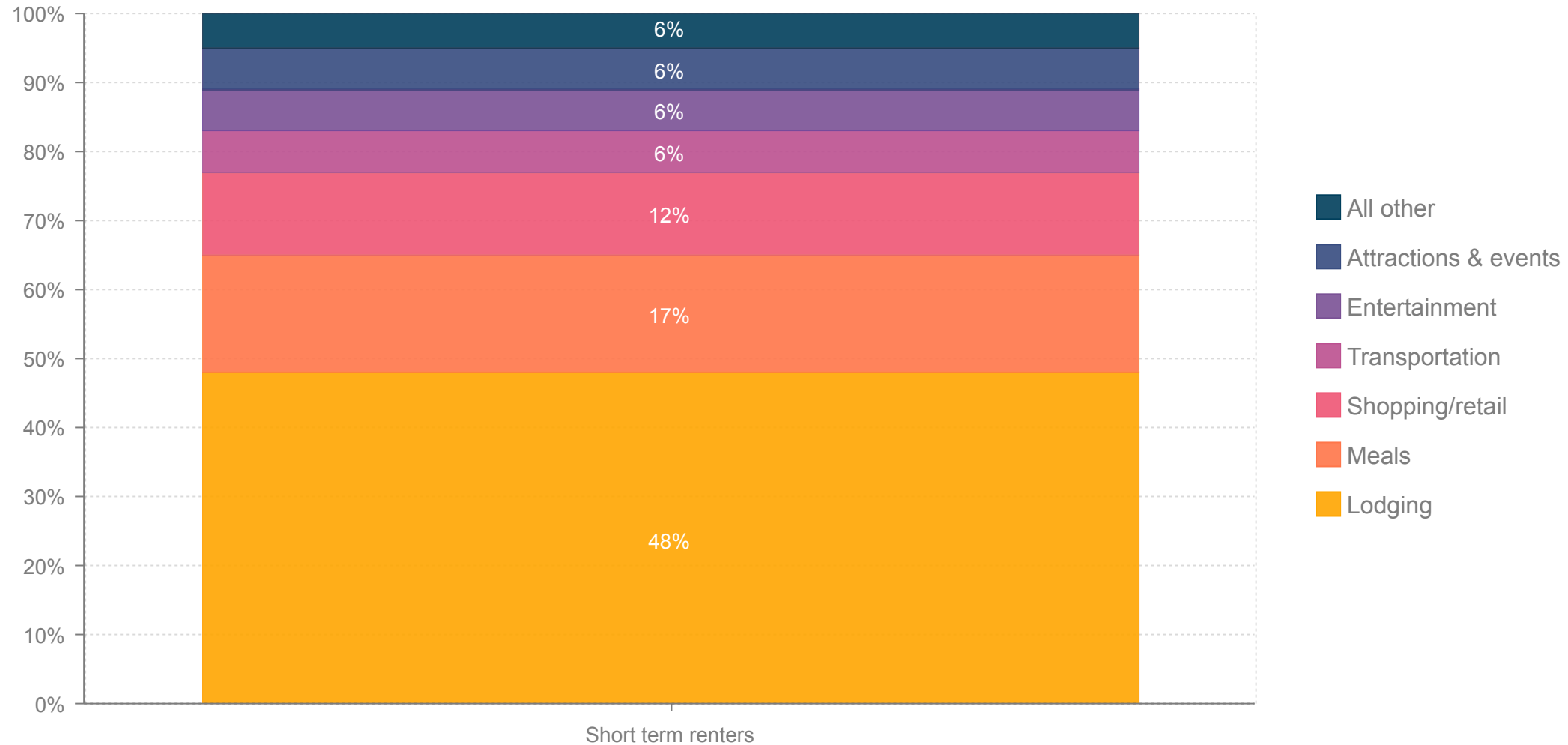
Total Expenditure Allocation by Category

Day trippers



Total Expenditure Allocation by Category

Short term renters



Mean Party Expenditures

All travelers

	Essex County	Franklin County	Hamilton County
Lodging	\$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

Mean Party Expenditures

Day trippers

	Day trippers
Lodging	\$0
Meals	\$63
Shopping/retail	\$44
Transportation	\$101
Entertainment	\$17
Attractions & events	\$19
All other	\$14
Average total expenditure	\$258
Average daily expenditure	\$258

Mean Party Expenditures

Short term renters

	Short term renters
Lodging	\$1,157
Meals	\$422
Shopping/retail	\$143
Transportation	\$291
Entertainment	\$135
Attractions & events	\$145
All other	\$141
Average total expenditure	\$2,434
Average daily expenditure	\$510

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.



Franklin County Visitor Profile

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adirondacks, usa

Visitor Profile

All Franklin County travelers

- Average traveler party age of respondents is 57, falling between the last two years of reported age (56 and 58).
- Mean annual reported household income of travelers was \$93,187, just below the prior year reported income of \$95,220, but above 2017 traveler reported mean income of \$87,717.
- Average reported total traveler party size was 3.7 persons, including an average of 2.8 adults and 0.9 children.
- Visitation by New York State residents comprised 68% of the respondent pool.
- 38% of NY travelers came from Western New York and 27% from the Capital District and north.

Visitor Profile

All Franklin County travelers

- 14% came from other Northeastern US states and 6% came from other regions of the U.S. 11% travelers were Canadian residents, nearly double from prior year.
- Average stay reported by 2019 travelers was 3.6 nights, nearly equal to the reported stay of 2018. Both are slightly longer than 2017 reported stays of 3.4 nights and in 2016 of 3.1 nights.
- Outdoor activities remained, by a substantial margin, the largest draw to the area with 67% of respondents.
- “Relaxing, dining and shopping” (43%) remained the second most frequently reported draw to visit the region, followed by sightseeing (38%). Visiting friends, heritage attractions, followed by events were reported as the next most common attractions (by 32%, 12%, 9% respectively).

Visitor Profile

All Franklin County travelers

- Times that travelers noted visiting Franklin County in 2019 were quite different from prior years, with fall (September/October) comprising 27% of visits, nearly equal to peak summer months (July/August) at 30% of visits.
- January/February also showed a sizable increase in proportionate visits (from 6% to 12%). The other seasons of the year for visitation stayed more consistent in comparison to prior year data.
- Later spring (May/June) marked 17% of visits, March/April 8% of visits and November/December 6% of visits.
- Average daily traveler party spending in 2019 is estimated at \$250 per day, just above the \$246 level from 2018 travelers. The total estimated trip expenditure is \$892, just below the \$911 reported in year prior.
- Average reported lodging, shopping, and meal expenditures all decreased slightly, however entertainment and transportation expenditures increased slightly.



Hamilton County Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

All Hamilton County travelers

- Average traveler party age of respondents was 57 years old; this is slightly older than the reported age of 56 in 2018.
- Mean annual reported household income of travelers was \$89,747, a decline from the average income of \$92,830 reported from the prior year.
- Average reported total traveler party size was 3.8 persons, including an average of 2.9 adults and 0.9 children, a decrease in party size from 2018 reported party size (4.3).
- Visitation by New York State residents comprised 84% of the respondent pool, up slightly from the prior year, with 53% of these travelers from western New York.

Visitor Profile

All Hamilton County travelers

- 11% of travelers within the survey came from other northeastern states and 3% came from southern U.S. states. These travelers from a farther distance had both declined slightly from the prior year. Canadian visitation was only 2% of visits.
- Average stay reported by 2019 travelers was 3.2 nights, a slight increase over average length stay reported in the prior two years.
- Peak summer months and early fall (July/August and September/October) continue to dominate reported visitation (56%) of reported annual visits.
- Early fall visitation reported increased over the prior year and summer visitation dropped. January/February saw a marked increase of proportion of visits, growing from 7% to 12%.
- Outdoor activities remained, by a substantial margin, the largest draw to the area with 69% of respondents indicating such interest.

Visitor Profile

All Hamilton County travelers

- “Relaxing, dining and shopping” (50%) remained the second most frequently reported draw to visit the region, followed by sightseeing (44%) and visiting friends (28%). Visiting heritage sites (12%), arts and entertainment (9%) and events and snowmobiling (7%) were reported as the next most common attractions.
- Snowmobiling is a notable interest in Hamilton County in comparison with the region, at 7% versus only 3% across the greater Adirondack region.
- Average daily traveler party spending in 2019 is estimated at \$306 per day, a slight drop from the 2018 level (\$312). Length of stay increased very slightly at 3.1 nights.

Visitor Profile

All Hamilton County travelers

- Total estimated average trip expenditure is \$963, growing almost \$30 from 2018. Lodging, meals and shopping all showed substantial increase in total reported spending.
- Reported expenditures in entertainment, attractions, events and miscellaneous “other” expenses declined somewhat from the prior year.

An aerial photograph of a small town situated along a large body of water. The town features a mix of residential and commercial buildings, a winding road, and lush green trees. A small boat is visible on the water in the upper left. The sky is clear and blue.

Day Tripper Visitor Profile

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REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

Day trippers

- A cross-tabulation of the regional visitors was completed to analyze the 884 day-trip only traveler respondents.
- The group was 19.9% of overall travelers, compared to 19% in 2017 and 20% in 2018; there does not appear to be any shift in the proportion of day travelers in recent years.
- Average day trip traveler party size is 2.8 persons, a substantially smaller figure than the average of 3.5 visitors and a decline somewhat over the last two years. Day trip respondents show an average of only 2.3 adults and 0.5 children.
- Overall expenditures are much lower among this group of travelers, with a total average reported expenditure of \$258 (versus \$1,191 total average trip or \$338 per day among all regional travelers).

Visitor Profile

Day trippers

- Daily expenditures in all categories are much lower as anticipated among day travelers on average than those who stay overnight.
- Most factors of regional attractions are reportedly of less interest to daytrip travelers with the exception of sightseeing, which is similar among both groups. This suggests that scenic drives are a highly popular activity within this group.
- Most outdoor activities are also of lower expressed interest to day trip travelers, except hiking, skiing/boarding, cross-country skiing and birding.
- Mean age of daytrip travelers, at 57 years, is just slightly higher than the mean age of all travelers (56). These average ages have increased during the last two years of data collection.

Visitor Profile

Day trippers

- Average household income of day travelers within the survey is 17% lower than among the full regional group. This disparity continues to grow through the last several years of data collection.
- Day trip travelers impacts are constrained by the short time spent in the area and spending patterns during the brief visits. It is interesting to note how much lower in each expenditure categories (outside of lodging) day traveler expenses are per day than those who stay overnight.
- Day trip travelers show a strong preference for sightseeing and specific outdoor activities such as hiking and skiing.

Short Term Renter Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

Short term renters

- A cross-tabulation of the regional visitors was completed to analyze the 501 traveler respondents who indicated that they stayed in short-term private home rentals.
- Average short term renter traveler party size is 5 persons versus 3.5 for all travelers to the region. While this declined from the 6.1 persons noted from 2018 travelers, it continues to be a substantially larger average visitor party size.
- Overall expenditures among this group were more than double that of the regional traveler and nearly 1/3 higher per day.
- The total trip expenditures of short term renters were \$2,434 and \$510 daily. This compares to \$1,191 total and \$383 daily for all regional travelers.

Visitor Profile

Short term renters

- All categories showed higher expenditure levels, however lodging accounted for the majority of this figure (\$1,157 among short term renters on average versus \$458 on average among all regional travelers).
- The reported average length of stay at 4.nights for short term renters is substantially higher than the average stay reported for all regional travelers (3.1).
- A slightly higher proportion of stays are noted among short term renters in peak summer and early fall (July-September) at 61% vs. 53% among all regional travelers. A substantially lower proportion of “off peak” spring/early summer travel (March to June) at 16% of all visits is noted among short-term renters than among all regional travelers (26%).

Visitor Profile

Short term renters

- Mean age of short term renters is slightly younger than the full regional group at 55 years (versus 56).
- Mean annual reported income is substantially higher among this group, at \$111,674 (versus \$98,907 among the full regional sample). The higher reported income among short-term renters has trended upward over the last two years.
- Short-term renters represent a sizable and growing (stable proportion this year) market that presents some challenges to the industry.
- Data gathered from this survey shows highly positive indications from this group, including longer visits, larger traveler parties, high expenditure levels across all categories, and higher household incomes.

Visitor Profile

Short term renters

- Short-term renters are also visiting during more “peak” seasons, which further impacts their expenditures, particularly in the lodging category.
- The higher expenditures of this group, on average, expand well beyond lodging costs into shopping, meals, and entertainment.
- Expressed use of short-term rentals, after growing for continuous years, has “leveled off” in the last two years.



Regional Visitor Impacts

ROOST

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adirondacks, usa

Regional Visitor Impacts

All travelers

- Average traveler party age of respondents was 56 years old and the mean annual reported household income of travelers was \$98,907. Average age was the same as year prior and reported income dropped slightly from the prior year.
- Average reported total traveler party size was 3.5 persons, including an average of 2.7 adults and 0.8 children.
- Peak summer months (July/August at 27%) and early fall (September/October at 26%) continue to dominate with more than half of reported annual visits.
- Fall visits showed a marked increase over the prior year.
- May/June continues as a strong secondary season for visitation regionally with 18% of reported visits. March-April adds 8% of travelers during the spring season.

Regional Visitor Impacts

All travelers

- Winter season, from November to February comprised 22% of visits, with January/February visits growing somewhat from the year prior.
- Hotels/motels remain the most popular lodging choice among 2019 traveler respondents (41%), followed by camping options (19%) and nearly equal proportion staying with family and friends and short-term rentals (14%/13%). Ten percent of respondents reported staying in their second homes.
- Outdoor activities were the largest draw to the area with 68% of respondents selecting this attraction. Relaxing, dining, and shopping was the second most frequently reported draw to visit the region (50%), followed by sightseeing (42%). Visiting friends (25%), Olympic sites (14%), heritage sites (12%), and events (9%) were the next most commonly selected attractions.

Regional Visitor Impacts

All travelers

- The average daily traveler party spending in 2019 is estimated at \$383 per day, or a total of \$1,191 reported per trip. This represents a slight increase over reported daily and trip 2018 spending, with the average reported stay at 3.1 nights. This stay also increased slightly over 3 nights average reported in the prior two years.
- The number of travelers who were influenced by ROOST in visiting the region in 2019 is estimated at over 1 million.
- The above calculations show that the total estimated revenue generated by travelers touched by ROOST was over \$333 million in 2019.

Regional Visitor Impacts

All travelers

- ROI of \$74 in leisure traveler-related revenue for every marketing dollar expenditure is estimated for 2019. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would be much greater.
- A number of positive attributes are seen regionally among 2019 visitors. These include a slightly longer stay in 2019, a higher reported conversion rate of potential to actual travelers and higher total reported expenditures.
- Most spending categories showed reported increases over the prior year, especially among the lodging, shopping, and miscellaneous expense figures.

Regional ROI Study

A person is fishing on a lake at sunset. The person is on the right side of the frame, wearing a cap and a backpack, holding a fishing rod. The sun is low on the horizon, creating a golden glow over the water and sky. The background shows a line of trees and distant mountains.

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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:

$$\begin{array}{ll} 367,288 & \text{(number of direct, traceable inquiries)} \\ \times 79\% & \text{(gross conversion factor)} \\ \times \$383 & \text{(mean traveler party expenditure per day)} \\ \times 3.1 & \text{(mean length of stay in nights)} \end{array}$$

- Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2019 is **\$333,390,990**.

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:

$$\begin{array}{rcl} & \$333,390,990 & \text{(total estimated traveler revenue)} \\ \div & \$4,512,724 & \text{(total ROOST marketing expenditures)} \end{array}$$

- This produces a conservatively-estimated ROI of **74:1** in leisure traveler-related revenue for every marketing dollar expended