
LEISURE TRAVEL STUDY

2020 VISITOR PROFILE

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)



Photo credit: ROOST-whitefaceregion.com

PlaceMaking

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EXECUTIVE SUMMARY

Introduction

This study was commissioned for the seventeenth (17th) year to measure leisure traveler information and key marketing program statistics for the Regional Office of Sustainable Tourism (ROOST) in Essex County, New York. ROOST is responsible for marketing Essex County's tourism assets. The research was targeted for the leisure travel market.

Certainly, this year provided an unprecedented time in modern history because of the COVID-19 pandemic. As such, the researchers and ROOST recognize the unusual time of visitation and social trends during 2020 and caution against direct comparison to other years of research. As the pandemic caused near shutdowns of most industries by late first quarter, most of the measured year show these impacts.

ROOST contracted with PlaceMaking, a regional community and economic development research firm to complete this study. ROOST sent a jointly created survey tool to a sample of its 2020 leisure travelers to Essex County. Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from visitors who spent most of their time in Essex County.

The end-product of this research includes detailed visitor information, estimated traveler expenditures and analysis and an estimated return on investment (ROI) for county-level marketing expenditures. ROOST measured a total of 161,763 traceable leads who were interested in visiting Essex County in 2020. PlaceMaking also conducted similar research for neighboring Hamilton County and for the cumulative two-county region. The number of traceable leads for the two-county region was 168,069. A regional summary and ROI analysis is provided under separate cover.

Survey Respondent Data Summary

Highlights of 2020 visitation to Essex County from all survey respondents included:

Demographics and Visit Information

- Average visitor party age of respondents was 53 years old, remaining close to the five-year average of 54 years.
- Respondents included 58% female and 42% males.
- 95% of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Hispanic, Asian ethnicity and 2% mixed race or African American.
- The average reported total traveler party size climbed substantially in 2020, to 4 adults and 1 child (from an average of 4 total in years prior).
- Visitation by respondents from New York State jumped to more than three out of four of all reported visitors (79%).
- Central/Western New York visitors comprised the largest group of New Yorkers at 37%. Approximately one-third (34%) of these NY State visitors came from the most nearby region, the Capitol District and north. Northeastern state visitors outside of NYS dropped slightly to 16% of respondents.
- Not surprisingly with the closure of the border in spring 2020, Canadian visitors dropped greatly to only 2% of respondents (from 8%). Similarly, out of state visitation from those outside the Northeast also dropped substantially to only 5% total.
- Stay length reported by 2020 travelers also increased greatly from prior years. The average length of stay roughly doubled from average stay length of the past five years to 6.5 nights.
- The times that travelers noted visiting the region in 2020 showed very strong summer peak visitation, modifying a slow trend in recent years toward increased shoulder season visitation. July/August visitation climbed to nearly one-third of annual reported visitation (31%). September/October visitation dropped somewhat to 23%. November/December (9%) and January/February (15%) visitation stayed consistent. January/February, March/April (6%) and May/June (15%) visitation dropped slightly.

- Hotels/motels remained the most reported lodging choice among 2020 traveler respondents by a high margin (47%).
- Short-term rentals grew in reported use substantially and became the second most common lodging choice used by 19% of respondents. Second home use (10%) and camping (13%) use remained consistent from prior recent years. Respondents reporting staying with family and friends and staying in a bed and breakfast or inn both dropped substantially.

Interests

- The most reported attraction to visit the area for many years, outdoor activities, increased substantially with 89% of respondents selecting this draw to visit.
- The long time second most reported attraction to visit the area, “Relaxing, dining and shopping” also gained this year with 62% of respondents selecting this attraction. Both top two attractions showed double digit growth in comparison to prior year. Sightseeing (46%) and Olympic attractions (29%) also demonstrated gains in popular draw to visit.
- A remarkable 91% of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity they sought. This also represents a double-digit gain from prior recent years’ levels of interest and showing pandemic results of overall interest in outdoor recreation. Reported interest in canoeing or kayaking also nearly doubled from prior years with over half (58%) of respondents to this question showing interest in that activity.
- Reported interest in cross-country skiing more than doubled from prior recent years surveying to nearly one-quarter (22%) of respondents indicated interest in this outdoor activity.
- The following were also selected as most popular outdoor activities of interest in descending order: fishing, boating, skiing/boarding, cycling, mountain biking and golf.
- A question regarding hiking preferences indicated that the most popular types of hiking continue to be day (63%), leisure/hard surface hiking (48%) and family hikes (28%). All types of hikes, however, indicated greater interest. Forty-six level hikes climbed to interest by 28% of respondents, with 11% of respondents

indicating interest in Saranac 6er hiking and 6% in the Tupper Triad. This is indicative of the massive increase in the already-growing hiking traffic in the Adirondacks during 2020.

Traveler Spending and Conversion

- The average daily traveler party spending in 2020 was estimated at \$283 per day. While this represents a 30% drop in daily spending from prior recent years, it is not indicative of an overall lower spending pattern due to longer stays.
- The total estimated trip expenditure was \$1,265, which represents a greater than 30% increase in average overall spending per visitor group. Visitor spending has been increasing for the past five years and this is an even more notable increase.
- Reported spending on lodging (correlated with the average length of stays) nearly doubled from 2019 to 2020.
- Average meals (\$449) and shopping (\$274) also showed substantial increases from recent years of data. All other reported expenditures showed lower average spending amounts, in large part likely due to pandemic closures and health concerns.
- 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 83%, just above the five-year average of 81%.
- Over 161,000 individuals contacted ROOST via its various outlets for travel information about Essex County in 2020. This represents an approximately 40 percent decrease in contacts from the prior year and is well below the five-year average; none of which is a surprise in an unprecedented pandemic year.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a leisure visitor survey for the ninth year. The study has employed

similar methodology with comparable results for seventeen years. The survey instrument was designed collaboratively by PlaceMaking and ROOST to gather information from its leisure travelers and to measure regionally the return on investment of marketing expenditures. As ROOST represents the tourism marketing interest for numerous Adirondack communities, the survey of 2020 travelers also included adjacent Hamilton County. Traveler studies for the two-county region and for Hamilton County individually are provided under separate cover.

Survey results are parsed by where the traveler indicated spending the most time to achieve individual county level results. It is acknowledged that this is not an exact measure, but the researchers believe that this provides reasonable results as the methodology is consistent per county and has shown reliability across multiple applications.

The survey was distributed electronically by ROOST to a sampling of its electronic database of visitors or parties inquiring about visitation to Essex County during 2020. The survey was sent in early January and analyzed in February/March 2021.

The visitors who were invited to participate in the survey represent traceable direct inquiries generated by the office's marketing efforts which resulted in individuals providing their contact information. This included respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter and FaceBook), through magazine reader service cards, and in-person visits. This study does not take into consideration the potentially large group of individuals that view travel materials and are then subsequently influenced to travel to the area, but do not provide traceable information.

The survey instrument was predicated on research for surveys with a similar purpose and was further refined based on the experience of the tourism professionals involved in the research. The on-line survey was attractively designed and provided unique Adirondack- related incentives to randomly selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a relatively higher survey return rate without skewing data.

A total of 13,434 invitations were sent by ROOST successfully through electronic mail. Of this group 3,593 responses were received for a 26% response rate. An additional 467 responses were received by Facebook respondents from 35,000 who viewed the request for the survey. This 1.3% response is much less significant of course, but given

the overall high level of response, researchers included the social media response to the aggregate group.

Of the approximately 3,593 responses, 2,682 responses were specific to Essex County, selecting an Essex County location as their primary destination.

The project team for this research is consistent with previous years of study, including project manager Victoria Zinser Duley- AICP, Principal with PlaceMaking, John Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management and Lisa Cyphers- Statistician.

RETURN ON INVESTMENT ANALYSIS

Return on investment (ROI) is measured by estimated expenditures directly generated by visitors and divided by the total marketing dollars spent by ROOST (occupancy tax dollars) in Essex County.

The first step in this process is to estimate total revenue generated by leisure visitors to the county, who were influenced by ROOST marketing materials, by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures and length of stay:

*161,763 (number of direct, traceable inquiries) x 83% (gross conversion factor)
x \$283 (mean traveler party expenditure per day) x 6.5 (mean length of stay in
nights)*

*= \$246,977,322 (total estimated revenue generated by travelers influenced by
ROOST in 2020)*

The second step in this process is to divide the total revenue generated by visitors by the marketing dollars spent through Essex County occupancy tax dollars:

*\$246,977,322 (total estimated traveler revenue) / \$2,636,397 (Essex County
occupancy tax collections)*

Return on Investment (ROI) = 94:1

The above calculations show that the total estimated revenue generated *directly* by visitors touched by ROOST was nearly over \$247 million. This produces an estimated

ROI of \$94 in leisure traveler-related revenue for each occupancy tax dollar expenditure. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would be much higher.

CONCLUSION

The COVID-19 pandemic had drastic results on the tourism industry as it did across most industries around the globe. ROOST played a key leading role in promoting more localized tourism with safety policies such as masking even on its outdoor main streets. ROOST worked with its many tourism assets and hospitality partners to determine how many could safely stay open or re-open to serve a reduced tourism population that was visiting the region.

As 2020 hit mid-year, the region began to see increases to visitation levels. While certain markets such as sports tournaments/events and group meetings were generally precluded, family and extended family trips became very popular. Comparing 2020 regional travel data¹ with national trends, it is clear that Essex County fared relatively well.

Occupancies over the year were indeed down (27%), but this is far less than was experienced nationwide or in most regions (closer to 40-50%)¹. Another bright spot is that the average daily rate (ADR) charged by lodging facilities increased 9% over year prior. Accommodations were able to charge higher rates to help keep workforce and to support the modifications in facility and cleaning to meet COVID-19 challenges.

The impacts of the COVID19 pandemic are shown in 2020 visitor research. One of these are the home area of visitors, almost entirely coming from NY State. This is due to travel restrictions which limited most New Yorkers to only tri-state travel for most of the year. The Canadian border was closed from April for the rest of the year, so few Canadian visitors could reach the area. Some out-of-state visitation continued but was limited. Much of this was from neighboring Connecticut and New Jersey as NY Department of Health widely-permitted this travel.

Much longer average stay durations were another pandemic reported occurrence. During the past 6 years of this research, the length of average visitor stays had declined, so this shift is particularly pronounced. With many industries operating remotely only, or in hybrid-form, many visitors could work remotely and stay with their families out of town.

Others had their work entirely shut down or closed and could do the same. The impact of the Payroll Protection Program which allowed companies to keep employees on payroll while in shut-down. This allowed many visitors to work remotely or to maintain income to travel while their place of business was on pause.

The increase of short-term rentals is also correlated to many of these longer stays. Researchers for the short-term rental industry note a 58% longer reported stay nationally in 2020 than in 2019².

Another pronounced change from prior years' research is the increase in average party size. Researchers and hospitality experts believe that this is at least in part due to families or friend groups participating in "COVID-pods". This has two or more family or friend groups traveling or spending close time together during the pandemic, with limited contact to others to prevent risk, but allowing for socializing.

Average reported lodging and meal expenditures rose to an all-time high through this research. Much of this is likely tied to length of stay. It remains to be seen if these expenditure levels will remain this high into the future.

The U.S. Travel Association³ calculated domestic travel reductions nationwide for 2020 from 2019. An estimated 36 percent decrease in travel expenditures were noted nationwide. The leisure market was estimated to have dropped just over 30% while the business travel market dropped a staggering 70%. International travel dropped even further at 76%.

Marketing expenditures were dramatically adjusted due to the pandemic. While level of visitor interest dropped, a strong ROI, consistent with the prior year, remained at 94:1.

The research team continues to discuss the broader impact of regional tourism on Essex County visitor assets and areas by which to expand traveler data collection accordingly. Considering the global pandemic, these data show a bright spot for some economic recovery in the hospitality industry in Essex County in 2021.

As the state and rest of the country and world access COVID-19 vaccinations and the travel industry begins to recover, it is anticipated that a new market may have found the region. It will be interesting to see if the patterns of greater expenditures and longer stays will remain. If some of these gains, as well as visitors returning who were

not able to get to the region during the height of the pandemic, it could provide years of continued growth.

These data can continue to be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency. Given the global anomalies in all activities of persons during the COVID-19 pandemic in 2020, it remains to be reminded that direct comparisons of the results of this year's data to other years should be done cautiously.

Table 1 below summarizes key Essex County traveler data ascertained by this survey during the last five years of data collection.

**TABLE 1. KEY FACTS DERIVED FROM SURVEY DATA-
5-YEAR COMPARISON**

	5 Year Average	2020	2019	2018	2017	2016
Number of Completed Survey Responses	2,623	2,682	3,070	1,975	1,990	3,397
Average Income of Respondents	NA	*	\$102,695	\$107,065	\$103,516	\$103,121
Mean Age of Respondents	54	53	56	54	53	52
Respondent Gender	56% Female 44% Male	58% Female 42% Male	52% Female 48% Male	56% Female 44% Male	59% Female 41% Male	NA
Direct Inquiries to Essex County via the Bureau	199,224	168,089	297,064	216,933	226,908	87,128
Average Night Stays/ Party	5.9 Nights	6.7 Nights	3.0 Nights	2.8 Nights	2.8 Nights	3.0 Nights
Average Party Size	3.8 Persons	7 Persons	3.4 Persons	3.9 Persons	3.9 Persons	3.8 Persons
Conversion Factor Rate	82%	83%	80%	79%	83%	84%
Average Daily Expenditure per Party	\$369	\$283	\$419	\$415	\$340	\$387
Average Total Expenditure per Party per Trip	\$1,272	\$1,838	\$1,265	\$1,151	\$943	\$1,161
Occupancy Tax Marketing Budget	\$2,623,890	\$2,636,397	\$3,001,292	\$2,725,222	\$2,544,018	\$2,212,431
ROI	82:1	94:1	100:1	73:1	70:1	72:1

**only median income (\$100,000) tabulated this year*

SOURCES CITED

1. Smith Travel Research, Inc. (property of Lake Placid CVB)- "Trend Report Essex County NY". February 2020.
2. Air DNA. "COVID-19 Short Term Rental Data". www.Airdna.co/covid-19-data-center February 2021
3. U.S. Travel Association. "Travel- the Hardest Hit U.S. Industry". ustravel.org 3/31/21