
TRAVEL STUDY

2022 VISITOR PROFILE

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)



Photo credit: ROOST

PlaceMaking

April 2023

EXECUTIVE SUMMARY

Introduction

The Regional Office of Sustainable Tourism (ROOST) in Essex County, New York commissioned this study, for the nineteenth (19th) year to measure traveler information and key marketing program statistics for Essex County, New York. ROOST is responsible for marketing Essex County's tourism assets. Research is targeted for the leisure travel market and excludes group and business visitors.

The year saw a return to more normal activities for visitors following two heavily impacted pandemic years. 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 2022 visitors 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, analysis and an estimated return on investment (ROI) for county-level marketing expenditures. ROOST measured a total of 197,268 traceable leads who were interested in visiting Essex County in 2022. PlaceMaking also conducted similar research for neighboring Hamilton County and for the cumulative two-county region including also the Villages of Saranac Lake and Tupper Lake in Franklin County. The number of traceable leads for the two-county region was 215,944. A regional summary and ROI analysis is provided under separate cover.

Survey Respondent Data Summary

Highlights of 2022 visitation to Essex County from all survey respondents include:

Demographics and Visit Information

- Average visitor party age of respondents was 58 years old, consistent with age from prior year survey.
- Respondents included 62% female and 38% male.

- 94% of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Asian and Hispanic. Less than 1% of respondent reported African American/Black and nearly 3% reported mixed race.
- The average reported total traveler party size climbed slightly from the prior year to 2.6 adults and 0.7 child, for a total average of 3.3.
- Sixty-seven percent of visitors (67%) reported that they were New York state residents dropping from nearly 80% in 2020 and 74% in 2021.
- Northern New York and the Capital district continued to be the most frequently reported visitors from this group at 33%, followed by central/western New York visitors at 26%. Eight percent (8%) of visitors reported from downstate/NYC region in 2022.
- Northeastern state visitors outside of New York state rose for the second consecutive year to one out of five (20%) of respondents. Out of state visitors coming from areas beyond the north comprised 8% of respondents, with the southern U.S being 5% of that figure.
- Canadian travel began to rebound in 2022, with three percent of visitors reporting from Quebec and two percent from Ontario.
- Average duration of stay reported by 2022 travelers climbed from the prior year, to 3.7 nights (3.3 nights reported in 2021) and slightly above the 5-year average.
- The times that travelers noted visiting the region in 2022 showed, for the second year in a row, visitation most commonly in peak fall (September/October- 29%). Fall travel comprising the highest proportion of visitors was a new finding in 2021.
- Frequency of reported fall visitation was followed by peak summer season (July/August- 21%). Reported January/February (11%) March/April (10%), May/June (18%), and November/December (11%) remained consistent from the year prior.
- Hotels/motels remained the most reported lodging choice among 2022 traveler respondents by a high margin (41%), however this gap between the next most common lodging choices has decreased over the years.

- Short-term rentals were reported as the second-most common lodging choice used by 19% of respondents. This figure has slowly but steadily grown. Respondents reported staying with family and friends fell to 14% (from 15% in 2021). Reported stays in second homes (11%) and bed and breakfasts (3%) remained relatively consistent from prior recent years. Camping and RV stays climbed slightly to 12% of reported stays (from 11% in year prior).

Interests

- The most reported draw in visiting the region continued to be outdoor activities, with 73% of respondents selecting this attraction to visit the area.
- “Relaxing, dining and shopping” remained the second-most commonly expressed reason to visit the area, selected by 60% of respondents. Sightseeing (48%) and visiting friends (28%) rounded out the top four areas of expressed interest. Each of these most commonly selected areas of interest rose slightly from the prior year.
- Twenty-three (23%) of respondents reported visiting Olympic sites as an attraction, a sizeable jump from the 17% reporting such interest in 2021. This is validating to the substantial investments recently made to a number of these facilities.
- Eighty percent (80%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of primary interest. The strength of hiking as a draw to visit the region has remained very strong during the past five years. Reported interest in canoeing or kayaking was the next most commonly reported outdoor interest (29%), followed by fishing (16%).
- Boating was expressed as an outdoor activity of interest by 13% of respondents. The winter pursuits of cross-country skiing/snowshoeing were reported of interest by 11% and skiing/boardings by 10% of respondents. Reported level of interest for both winter activities climbed from the prior year.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 74% of respondents indicating interest in day hikes, 25% in leisure and hard surface hiking and 24% in family hikes. Indicated interest in Forty-sixer level hikes climbed back to 28%, consistent with response levels from two years ago and substantially higher than from 2021 visitors.

Traveler Spending and Conversion

- The average daily traveler party spending in 2022 is estimated at \$512 per day. This represents a 10% increase in daily spending from prior year reported spending.
- The total average estimated trip expenditure was \$1,895, a 27% increase in total reported spending by 2022 visitors. This returns estimated spending levels to the record high seen in 2020 during the height of the pandemic (unusually long trips due to displaced work/vacation schedules).
- Reported spending on lodging showed a record-high (from the nearly 20 years of this data collection) of \$950 per average stay, climbing 39% from the prior year. This comprised the largest proportion of the overall reported spending increases.
- All other spending categories showed at least modest increases from the prior year, with transportation demonstrating a steep of climb of 40% in estimated cost.
- 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 82%. This is consistent with the expressed conversion average from the past five years.
- ROOST received 285,844 contacts through its marketing efforts for Essex County in 2022. Contacts have steadily increased during the last two years in recovery from the pandemic.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the eleventh year. The study has employed similar methodology with comparable results for 19 years. PlaceMaking and ROOST

collaboratively designed the survey instrument to gather information from its leisure visitors, 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 2022 visitors also included adjacent Hamilton County. Visitor studies for the two-county region (including also the Village of Tupper Lake in Franklin County) and for Hamilton County are provided under separate covers.

Researchers parsed survey results by where the traveler indicated spending the most time, in order to achieve individual county level results. 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 over time.

ROOST distributed the survey electronically to a sampling of its electronic database of visitors inquiring about visitation to Essex County during 2022. Surveys were collected quarterly. Within the month following each travel quarter, ROOST sent surveys electronically to a sampling of visitors who had inquired about traveling. This allowed surveys to be modified very slightly by seasonal activities and particularly to improve trip data recollection near to the actual date of travel.

The visitors invited to participate in the survey represent traceable direct inquiries generated by ROOST's marketing efforts. The individuals provide their contact information, so ROOST may verify that they are unique participants. This included respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter, Facebook, Instagram and YouTube), website, printed materials and in-person visits. This study does not take into consideration the potentially large group of individuals who view travel materials and are then subsequently influenced to travel to the area, but do not provide traceable information.

The survey instrument is predicated on national and regional research with a similar purpose and refined based on the experience of tourism professionals. The online survey is attractively designed and provides unique Adirondack- related incentives to randomly selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a higher survey return rate without skewing data.

Approximately 215,000 invitations were sent by ROOST for the regional survey. Nearly 6,000 responses were received. This results in an approximately 3% response rate. Approximately half of these were from those who visited this portion of the Adirondacks during the 2022 year at least once. This is a lower survey pool than seen in recent

years. Overall travel leads were higher and general survey response is increasingly difficult to maintain. While researchers prefer at least a 5% response and as large an actual visitor pool as possible, the results appear to be valid in comparison to many years of data

collection and external data review.

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

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:

*197,268 (number of direct, traceable inquiries) x 82% (gross conversion factor)
x \$512 (mean traveler party expenditure per day) x 3.7 (mean length of stay in
nights)*

*= \$306,437,689 (total estimated revenue generated by travelers influenced by
ROOST in 2022)*

The second step in this process is to divide the total revenue generated by visitors by the marketing dollars spent through 2022 Essex County marketing budget:

*\$306,437,689 (total estimated traveler revenue) / \$2,993,635 Essex County
marketing budget)*

Return on Investment (ROI) = 102:1

The above calculations show that the total estimated revenue generated directly by visitors touched by ROOST was over \$306 million. This produces an estimated ROI of \$102 in leisure traveler-related revenue for each marketing budget dollar expenditure. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would increase the ROI.

CONCLUSION

ROOST has played a key leading role in promoting tourism and return to broader markets as the world moved out of the pandemic. Beginning in the prior year, data from 2022 visitors show a return toward more typical visitor patterns. A return to sports tournaments and events provided a boost to visitor numbers and dollars spent.

Smith Travel Research (STR) is the world leader in producing lodging data. The areas of measure are RevPAR (revenue per available room) which is a factor of both occupancy percentage and the average daily room rate. STR also measures the supply and demand of rooms available in the market.

The RevPAR for Essex County¹ has been steadily increasing since the Pandemic effect of 2020. The county has experienced a 25% growth in Rev PAR since 2019 and it has increased 14% since 2022. The room supply has maintained at a stationary level for the last few years however the room's demand has increased 10% since last year alone. All five of the STR data indicators show very favorable trends for the Essex County region. Overall county occupancies saw a full recovery to pre-pandemic levels in 2022.

The average daily rates charged by lodging facilities increased and occupancies increased over 11% in comparison to prior year¹. This substantiates the trend of reported higher lodging expenditures seen in the survey and emphasizes real revenue growth. Domestic travel across the U.S. saw a return to pre-pandemic levels (2019) by the end of 2022².

Most expenditure categories reported all-time highs. Daily expenditure levels, particularly in key areas of lodging, meals and transportation, have been on a steady growth trend even before the recent year and a half of inflation impacts. This is a strong factor in continued regional economic impact.

These increased levels have the added benefit of improving the occupancy tax revenues that the region can employ to further improve marketing and area attraction efforts. Daily expenditure levels have been on a steady growth trend even before the recent

year and a half of inflation. This is a strong position for continued regional economic impact.

A return of visitors from areas further afield than New York state occurred during 2022. The longer stays reported in 2020 and larger visitor party sizes, as expected, have returned to more typical 3-to-4-day averages and visitor party sizes of 3 to 4 persons.

Short-term rentals continue to be a growing portion of visitor accommodations. For the first time in this data collection, nearly one in five respondents reported staying in a short-term rental. This impact to the region continues to be an area that ROOST works to improve and manage in conjunction with local governments.

For a second year, visitors who reported traveling in peak fall exceeded those who reported visiting in peak summer. This shift to an extremely strong fall visitation is notable. Visitation in the shoulder seasons to summer and fall has stayed consistent.

The U.S. Travel Association predicts domestic travel to stay strong in 2023 and a slow continued improvement of business travel. Sluggish recovery of international travel is predicted as well, which impacts expected Canadian visitors to the region to some extent. Statista shows the travel market expanding substantially due to greater ease of mobility and improved awareness of destinations due to widely accessible information³. Preferences include higher levels of hygiene and contactless services, as well as sustainable travel practices.

ROOST has well positioned its marketing to address travel opportunities. Its 2022 return on investment (ROI) was found at 102:1 and well above the 5-year average.

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. The higher levels of daily spending and returning visitor patterns from pre-pandemic times are strong points to continue to grow the regional economy. These data can continue to be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency.

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	2022	2021	2020	2019	2018
Number of Completed Survey Responses	2,920	2,571	4,302	2,682	3,070	1,975
Median Income of Respondents	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Mean Age of Respondents	56	58	58	53	56	54
Respondent Gender	58% Female 42% Male	62% Female 38% Male	60% Female 40% Male	58% Female 42% Male	52% Female 48% Male	56% Female 44% Male
Direct Inquiries to Essex County via ROOST	214,293	197,268	198,439	161,763	297,064	216,933
Average Night Stays/ Party	3.9 Nights	3.7 nights	3.3 Nights	6.7 Nights	3.0 Nights	2.8 Nights
Average Party Size	3.8 Persons	3.3 Persons	3.3 Persons	5 Persons	3.4 Persons	3.9 Persons
Conversion Factor Rate	81%	82%	80%	83%	80%	79%
Average Daily Expenditure per Party	\$419	\$512	\$464	\$283	\$419	\$415
Average Total Expenditure per Party per Trip	\$1,526	\$1,895	\$1,482	\$1,838	\$1,265	\$1,151
Marketing Budget	\$2,821,508	\$2,993,635	\$2,750,993	\$2,636,397	\$3,001,292	\$2,725,222
ROI	91:1	102:1	88:1	94:1	100:1	73:1

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex County NY". 2022.
2. U.S. Travel Association. "Travel- Forecasts" ustravel.org 11/29/22
3. Statista.com. "Domestic Travel Summary" 2022.