
TRAVEL STUDY

2023 VISITOR PROFILE

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)



PlaceMaking

April 2024

EXECUTIVE SUMMARY

Introduction

The Regional Office of Sustainable Tourism (ROOST) in Essex County, New York commissioned this study, for the twentieth (20th) 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.

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 2023 visitors to Essex County. Visitors were requested to complete an online survey (via 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 generated a total of 207,484 leads who were interested in visiting Essex County in 2023. PlaceMaking also conducted similar research for neighboring Hamilton County and for the cumulative two-county region also including the Villages of Saranac Lake and Tupper Lake in Franklin County. The number of traceable leads for the two-county region was 228,324. A regional summary and ROI analysis is provided under a separate report.

Survey Respondent Data Summary

Highlights of 2023 visitation to Essex County from all survey respondents include:

Demographics and Visit Information

- The average visitor party age of respondents was 57 years old, slightly younger from the prior year survey (58).
- Respondents included 57% female and 43% male.
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total average of 3.2. This is just slightly lower than the reported party size last year (3.1, including 2.6 adults and 0.7 children).

- Sixty-seven percent of visitors (67%) reported that they were New York state residents, which is equivalent to that reported in the prior year.
- Northern New York and the Capital District continued to be the most frequently reported visitors from this group at 31%, followed by central/western New York visitors at 27%. Nine percent (9%) of visitors reported from downstate/NYC region in 2023.
- Northeastern state visitors outside of New York state remained at 20% of respondents. This proportion has grown over the last 5 years. Out of state visitors coming from areas beyond the northeast comprised 7% of respondents, with the southern U.S. comprising 4% of that number.
- Canadian visitation continued to rebound from pandemic year declines, with 4% from Quebec and 3% from Ontario (each up by 1% from the prior year).
- The average duration of stay reported by 2023 travelers was 3.5 nights which is slightly below the 5-year average.
- Hotels/motels remained the most reported lodging choice among 2023 traveler respondents by a high margin (48%) and a substantial jump from the year prior (43%).
- Short-term rentals were reported as the second-most common lodging choice used by 18% of respondents. This figure dropped by 1% from the year prior, following many years of gains. Respondents reporting staying with family and friends dropped slightly from the year prior to 13%. Reported stays in second homes (9%) and camping/RV camping (9%) both dropped slightly from the year prior. Respondents reporting stays at bed and breakfasts (3%) remained consistent from prior recent years.

Interests

- The most reported draw in visiting the region continued to be outdoor activities, with 62% of respondents selecting this attraction to visit the area. This declined somewhat from 2022 visitor expressed level of interest (which was 73%).

- “Relaxing, dining and shopping” remained the second-most expressed reason to visit the area, selected by 52% of respondents. Sightseeing (38%) and visiting friends (22%) rounded out the top four areas of expressed interest. Each of these most commonly selected areas of interest dropped slightly from the prior year.
- Just over one in five respondents (21%) reported visiting Olympic sites as an attraction. Fifteen percent (15%) of respondents indicated that events were an attraction to visit the region, a second year high for this figure.
- Just over three out of four (76%) respondents indicating that they came to the area for outdoor activities stated that hiking was an activity of primary interest. Reported interest in canoeing or kayaking was the next most reported outdoor interest (24%), followed by cross-country skiing/snowshoeing (16%) and fishing (13%). Reported interest in cross-country skiing/snowshoeing was substantially higher than from the prior year (which was 11% from 2022 visitors).
- Boating and skiing/snowboarding were each expressed as outdoor activities of interest by 12% of respondents. Birding was noted as an attraction by 9% of respondents.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 66% of respondents indicating interest in day hikes, 32% in leisure and hard surface hiking and 22% in family hikes. Indicated interest in Forty-sixer level hikes is 27%. These figures have remained consistent during the five years of data collection in this area.
- A new question was asked this year of those who responded that they were interested in arts and entertainment. These respondents were questioned what types of arts activities were of interest. The strongest area of interest was live music, expressed by 67% of respondents. This was followed by visiting art galleries (42%) and live theater events (22%).

Traveler Spending and Conversion

- The average daily traveler party spending in 2023 is estimated at \$536 per day. This is slightly higher than was reported from 2022 visitors (\$512).
- The total average estimated trip expenditure was \$1,878, nearly equal with the prior reported year and record high levels.

- Reported spending on lodging dropped somewhat from the record high (\$950) in the prior year to \$895.
- All other spending categories showed at least modest increases from the prior year, with only reported transportation spending declining substantially from the 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 82%. This is consistent with the expressed conversion average from the past five years.
- ROOST received 207,484 contacts through its marketing efforts for Essex County in 2023. Contacts have steadily increased during the last three 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 20 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 2023 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, 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 2023. 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 to the region. This allowed surveys to be modified very slightly by seasonal activities and particularly to improve trip information.

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 include 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 230,000 invitations were sent by ROOST for the regional survey and not returned. Just over 19,000 responses were received. This results in an approximately 8% response rate. These travel researchers aim for a response rate of 6% or higher and are satisfied with this response. Results appear 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:

*207,484 (number of direct, traceable inquiries) x 82% (gross conversion factor)
x \$536 (mean traveler party expenditure per day) x 3.5 (mean length of stay in
nights)*

*= \$319,176,787 (total estimated revenue generated by travelers influenced by
ROOST in 2023)*

The second step in this process is to divide the total revenue generated by visitors by the marketing dollars spent through 2023 Essex County marketing budget:

*\$319,176,787 (total estimated traveler revenue) / \$3,886,747 Essex County
marketing budget)*

Return on Investment (ROI) = 93:1

The above calculations show that the total estimated revenue generated directly by visitors touched by ROOST was over \$319 million. This produces an estimated ROI of \$93 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 substantially.

CONCLUSION

ROOST has played a leading role in promoting tourism and return to broader markets as the world moved out of the pandemic during the last two years. Data support this with a turn in more typical visitation figures in many areas seen from last year's collection. A return to sports tournaments and events provided a boost to visitor numbers and tourism 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. For the first time in several years, however, average occupancy declined (by 6.5%). Occupancy declined slightly in part as a result of increased supply (by 8% according to STR).

Expenditure categories outside of lodging reported gains across all categories, with the exception of transportation. Daily expenditure levels have been on a steady growth trend even before the recent years of inflation impact. This is a strong factor in continued regional economic growth. These increased levels have the added benefit of improving the occupancy tax revenues that the region can use to further improve marketing and area attraction efforts. This is a strong position for continued regional economic impact.

Average visitor party sizes and length of stay have been consistent since the pandemic's end. Short-term rentals continue to be an important source for visitor accommodation; for the second year nearly one in five respondents reported staying in a short-term rental. This figure did not grow from 2023 visitation data however, as it has nearly every year for an extended time. A moratorium on new short-term rentals in Lake Placid surely affected the supply during this year.

The U.S. Travel Association predicts domestic travel to stay strong in 2024, although growth to be slow as it saw during much of 2023. According to their report², "Domestic leisure growth decelerated through three quarters of 2023 as consumer spending slowed amid higher borrowing costs, tighter credit conditions and the restart of student loan repayments." The data source Statista shows the domestic travel market growing slowly through 2024 and predicts similar "slow growth" through the next two to three years³.

ROOST has well positioned its marketing to address travel opportunities. The 2023 return on investment (ROI) was found at a healthy 93:1 which is near to the five-year average of 95:1. While post pandemic growth has slowed considerably, many measurements show a strong travel market and indicators such as the increase in reported expenditures across most categories.

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, opportunities, 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	2023	2022	2021	2020	2019
Number of Completed Survey Responses	3,193	3,342	2,571	4,302	2,682	3,070
Median Income of Respondents	\$100,000	\$105,000	\$100,000	\$100,000	\$100,000	\$100,000
Mean Age of Respondents	56	57	58	58	53	56
Respondent Gender	58% Female 42% Male	58% Female 42% Male	62% Female 38% Male	60% Female 40% Male	58% Female 42% Male	52% Female 48% Male
Direct Inquiries to Essex County via ROOST	212,403	207,484	197,268	198,439	161,763	297,064
Average Night Stays/Party	4.0 Nights	3.6 Nights	3.7 Nights	3.3 Nights	6.7 Nights	3.0 Nights
Average Party Size	3.6 Persons	3.2 Persons	3.3 Persons	3.3 Persons	5 Persons	3.4 Persons
Conversion Factor Rate	81%	82%	82%	80%	83%	80%
Average Daily Expenditure per Party	\$443	\$536	\$512	\$464	\$283	\$419
Average Total Expenditure per Party per Trip	\$1,650	\$1,768	\$1,895	\$1,482	\$1,838	\$1,265
Marketing Budget	\$2,963,492	\$3,435,145	\$2,993,635	\$2,750,993	\$2,636,397	\$3,001,292
ROI	95:1	93:1	102:1	88:1	94:1	100:1

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex County NY". 2022.
2. U.S. Travel Association. "Research-Travel-Forecasts" ustravel.org 1/17/24
3. Statista.com. "Domestic Travel Summary" 2023.