



Leisure Travel Study

2023 Essex County Visitor Focus

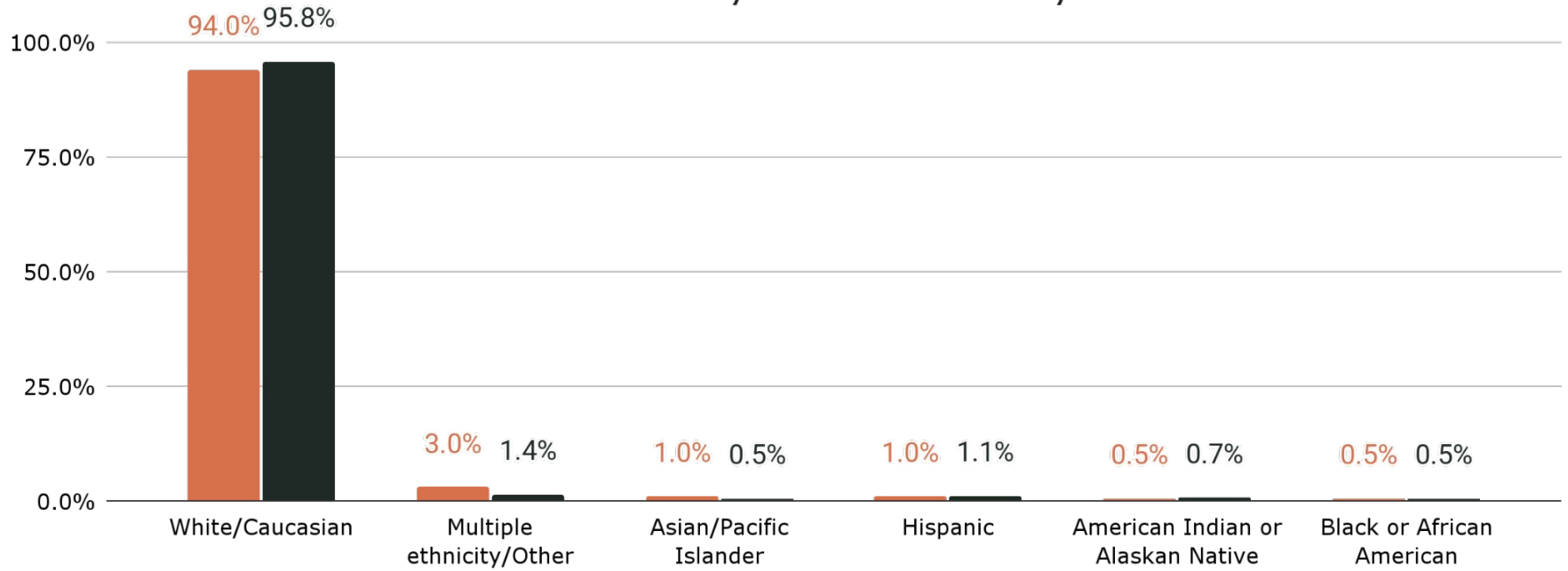
ROOST

Project background and methodology

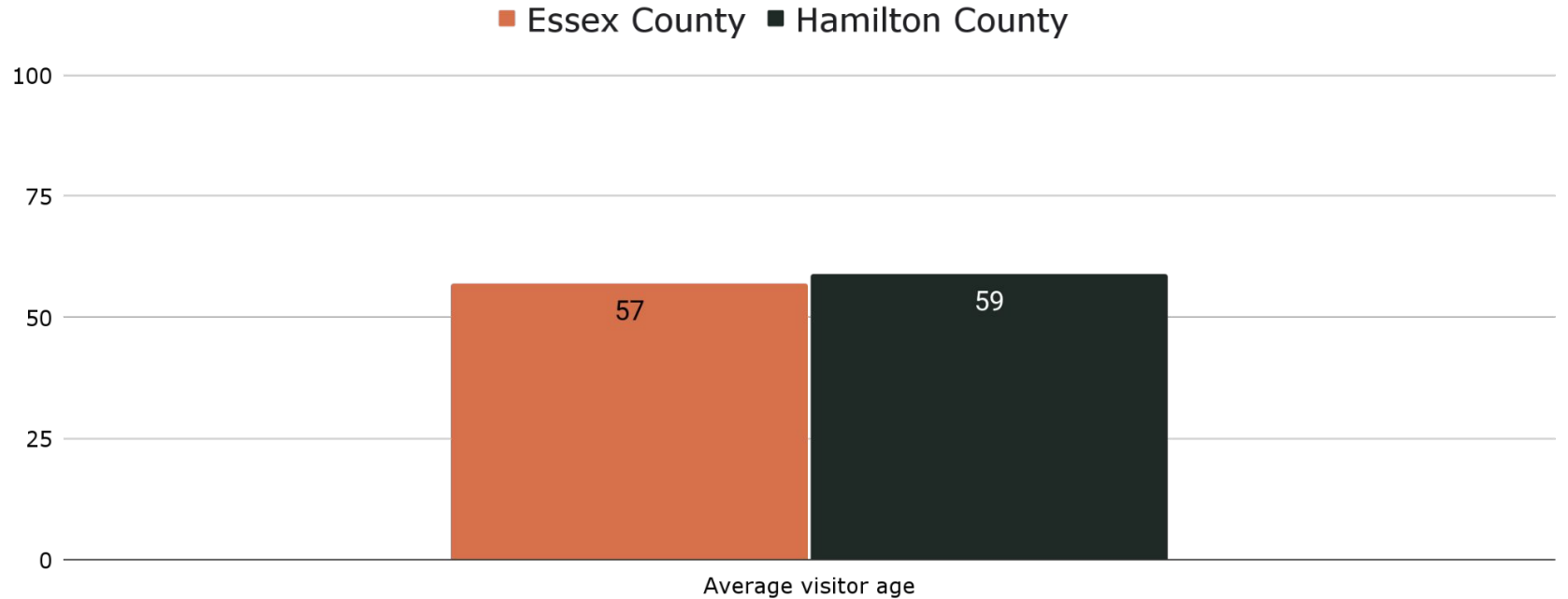
- ROOST commissioned a study with PlaceMaking, a regional community and economic development research firm, to determine visitor information at the county levels and to gauge key regional marketing program statistics.
- ROOST sent a jointly created survey to a sample of its 2023 leisure travelers to the region. This year's study marks 20 years of ROOST and partners completing this visitor research. 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 the region.
- In this report, "all travelers" refers to visitors to Essex and Hamilton counties, and the villages of Tupper Lake and Saranac Lake in Franklin County.
- This research includes detailed visitor information, estimated traveler expenditures and analysis, and an estimated return on investment (ROI) for the region's marketing expenditures. ROOST measured 228,324 traceable leads who were interested in visiting the region in 2023. PlaceMaking also compiled similar research for Essex and Hamilton counties individually, which are available under separate covers.
- ROOST also commissioned a separate study that ascertained visitor opinions and perceptions about sustainability relative to travel decisions, which is available under a separate cover.

Ethnicity

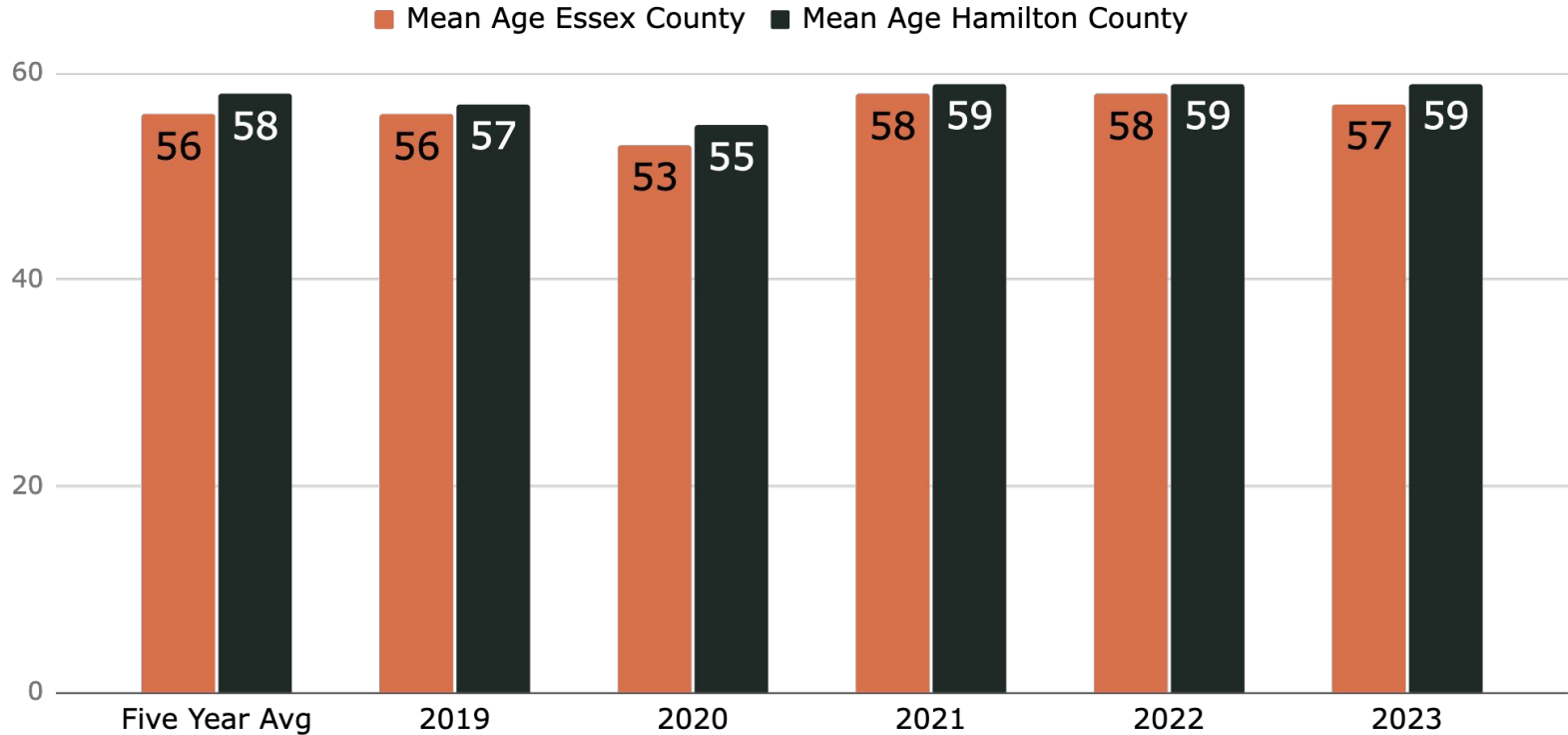
■ Essex County ■ Hamilton County



Average age

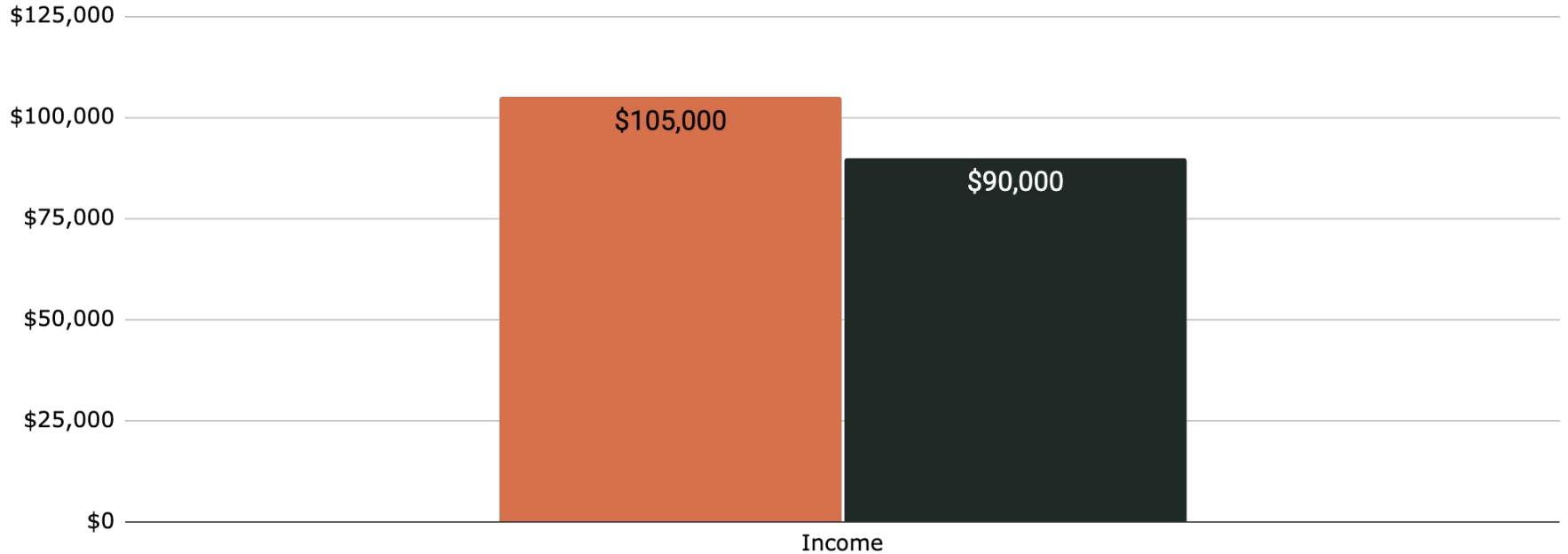


Five year average age

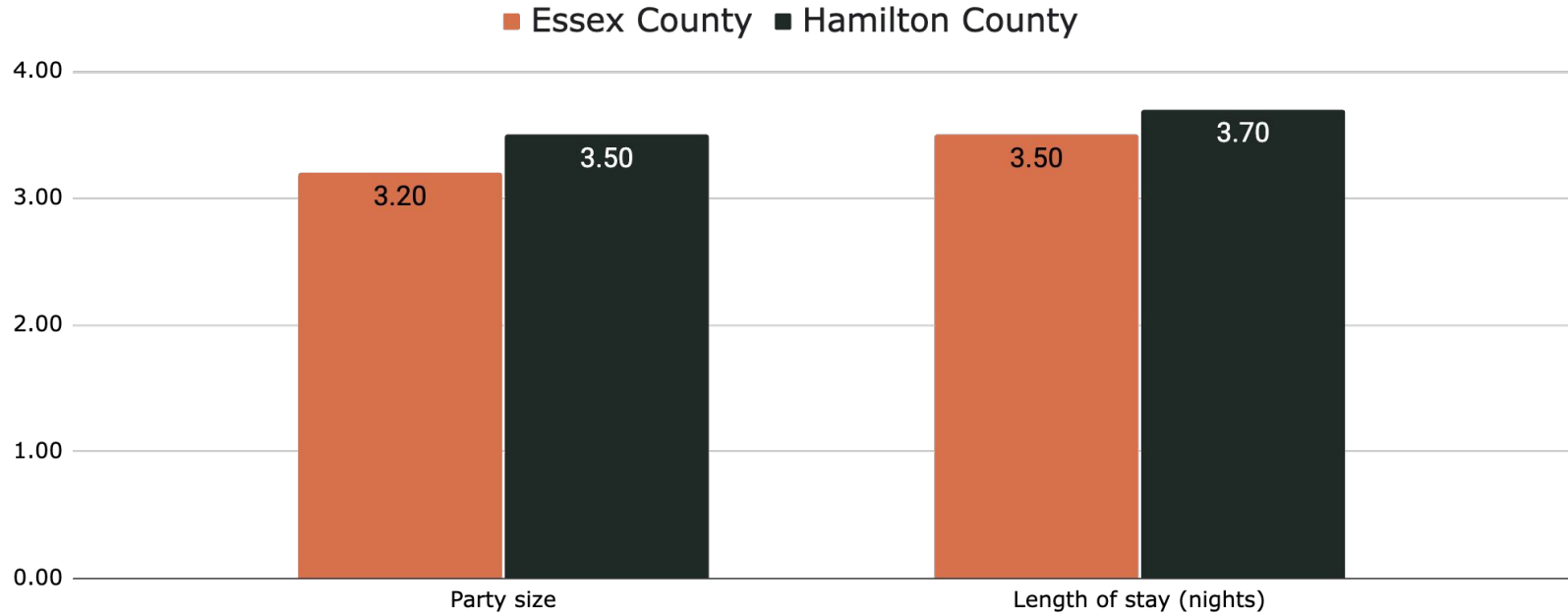


Average income

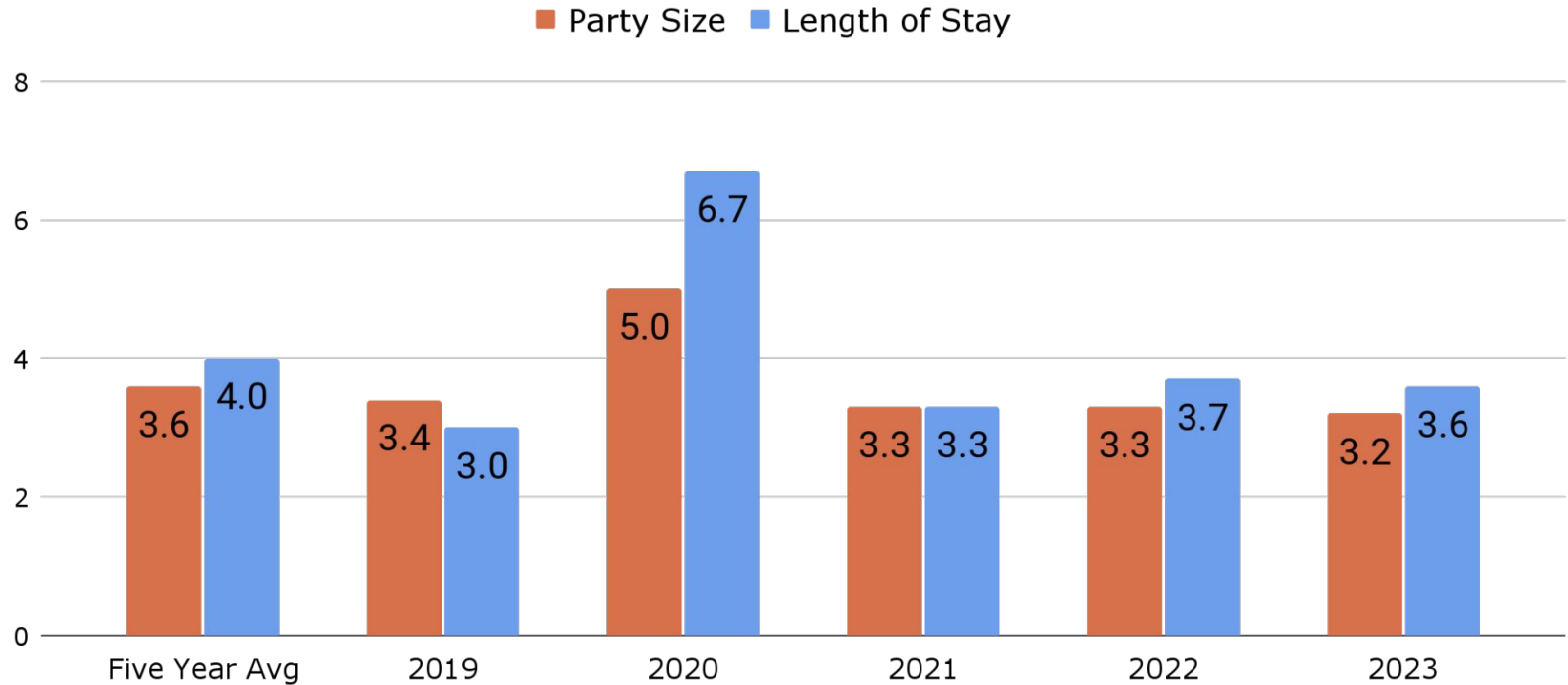
■ Essex County ■ Hamilton County



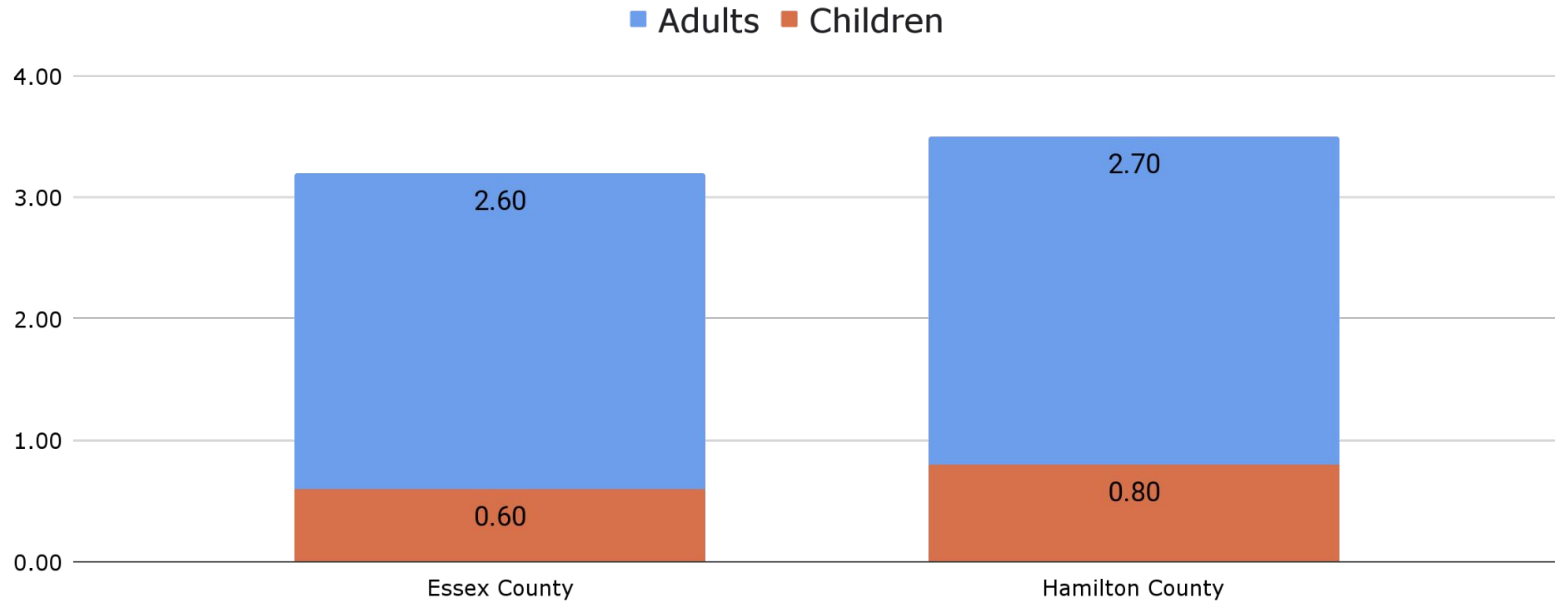
Party size / Length of stay



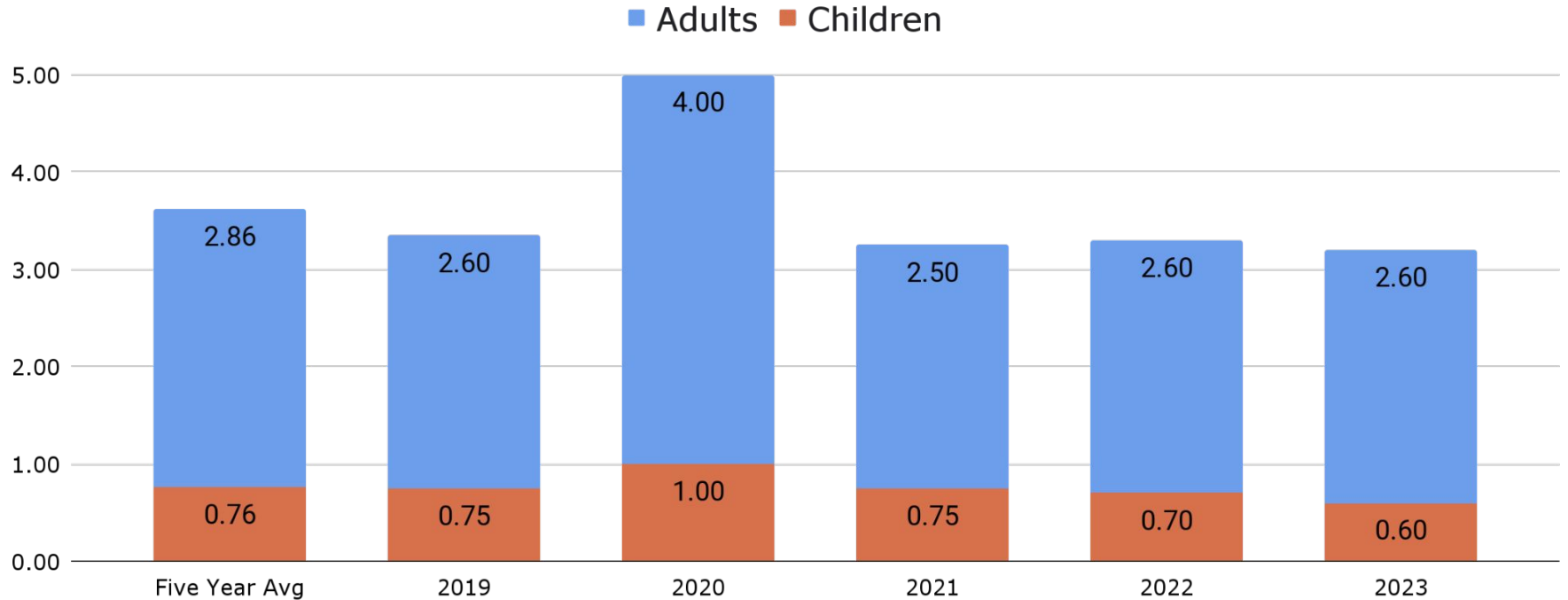
Five year average party size / Length of stay - Essex County



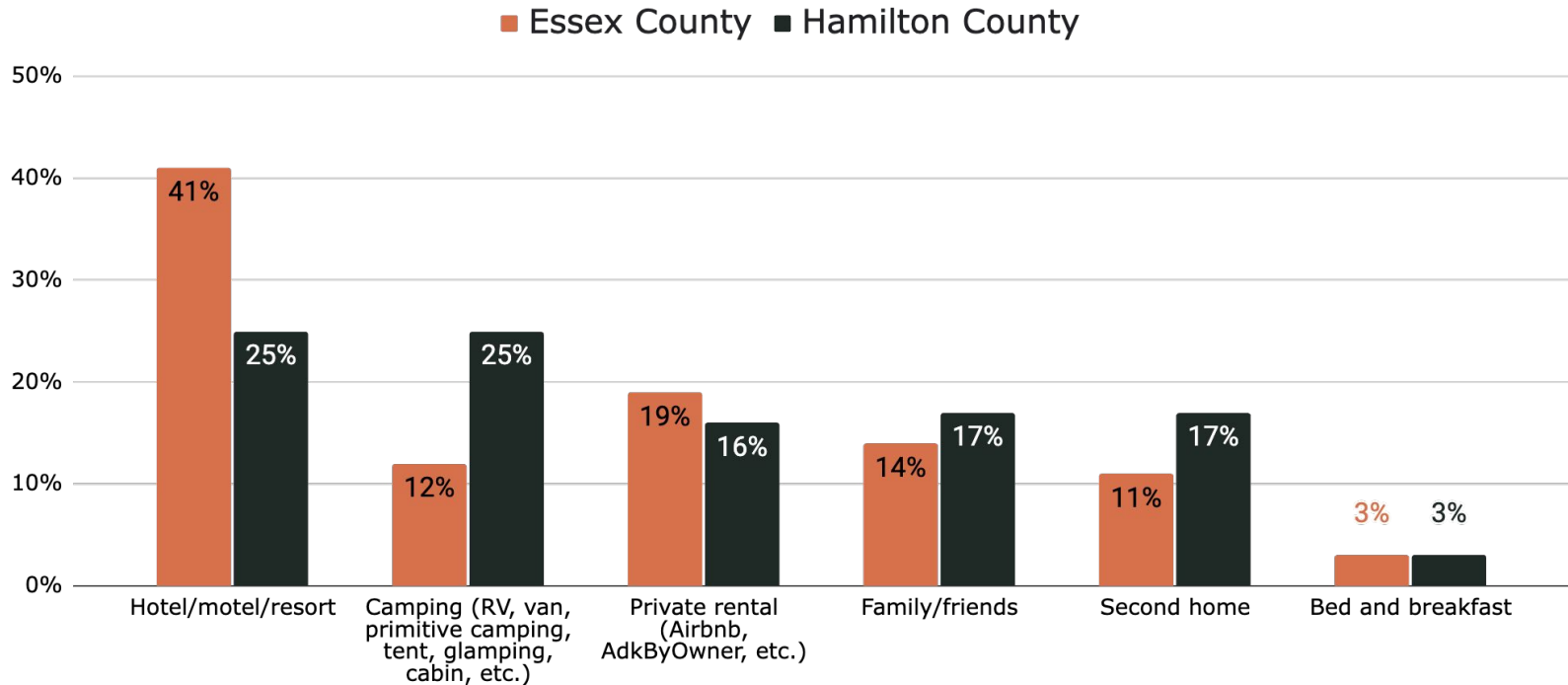
Party composition



Five year average party composition - Essex County

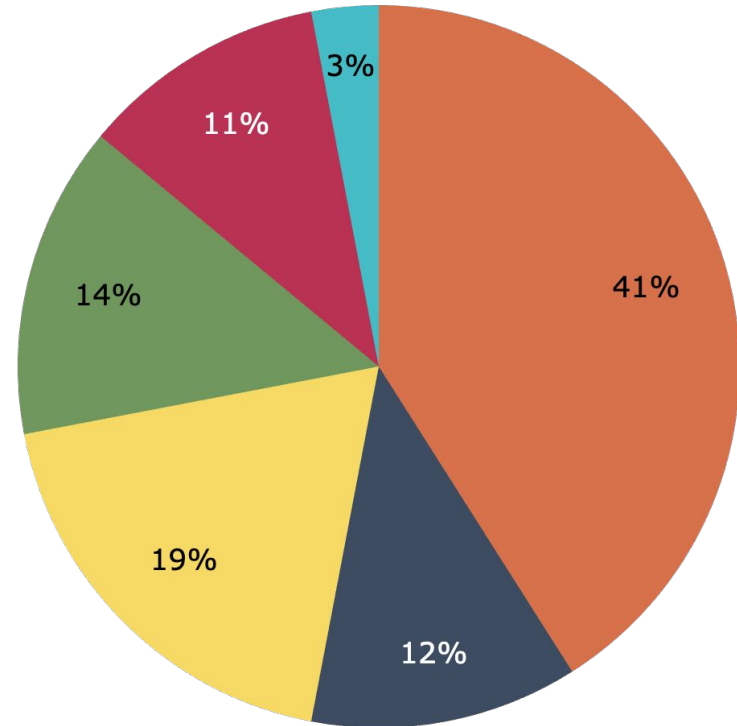


Lodging accommodations

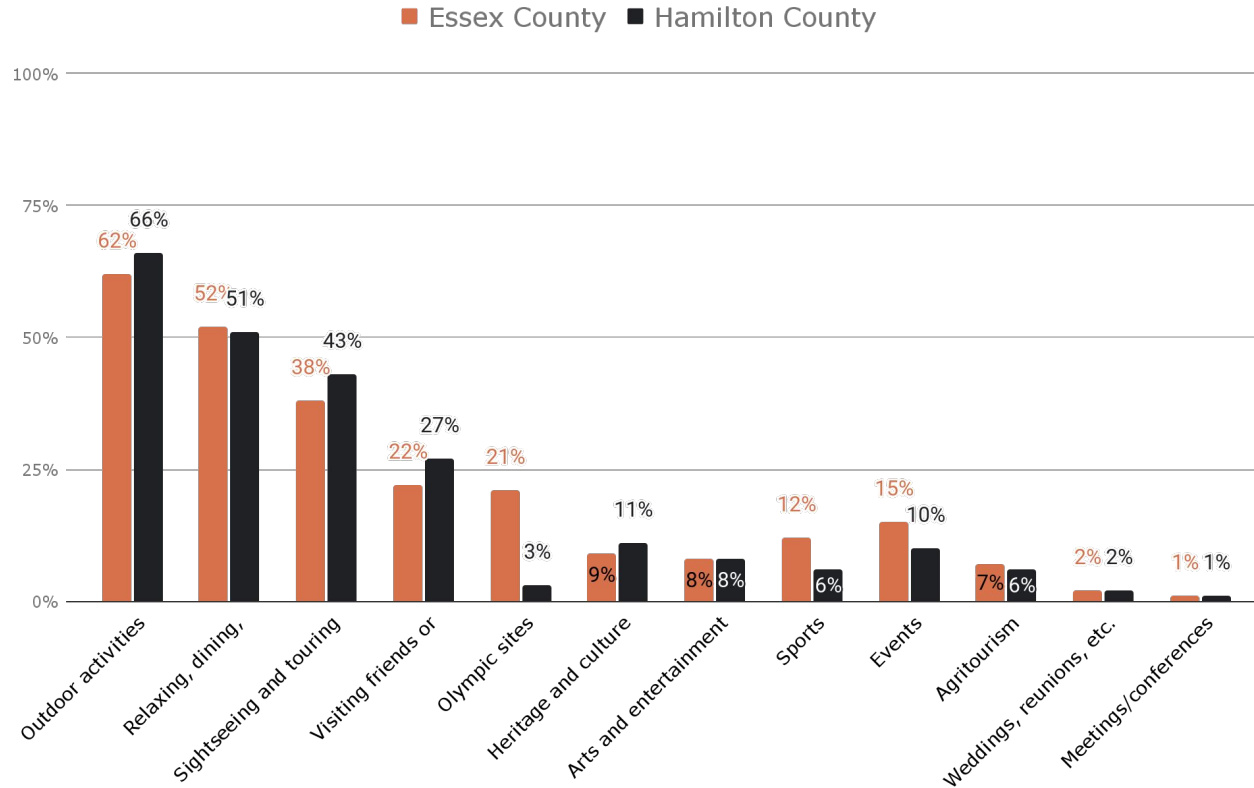


Lodging accommodations - Essex County

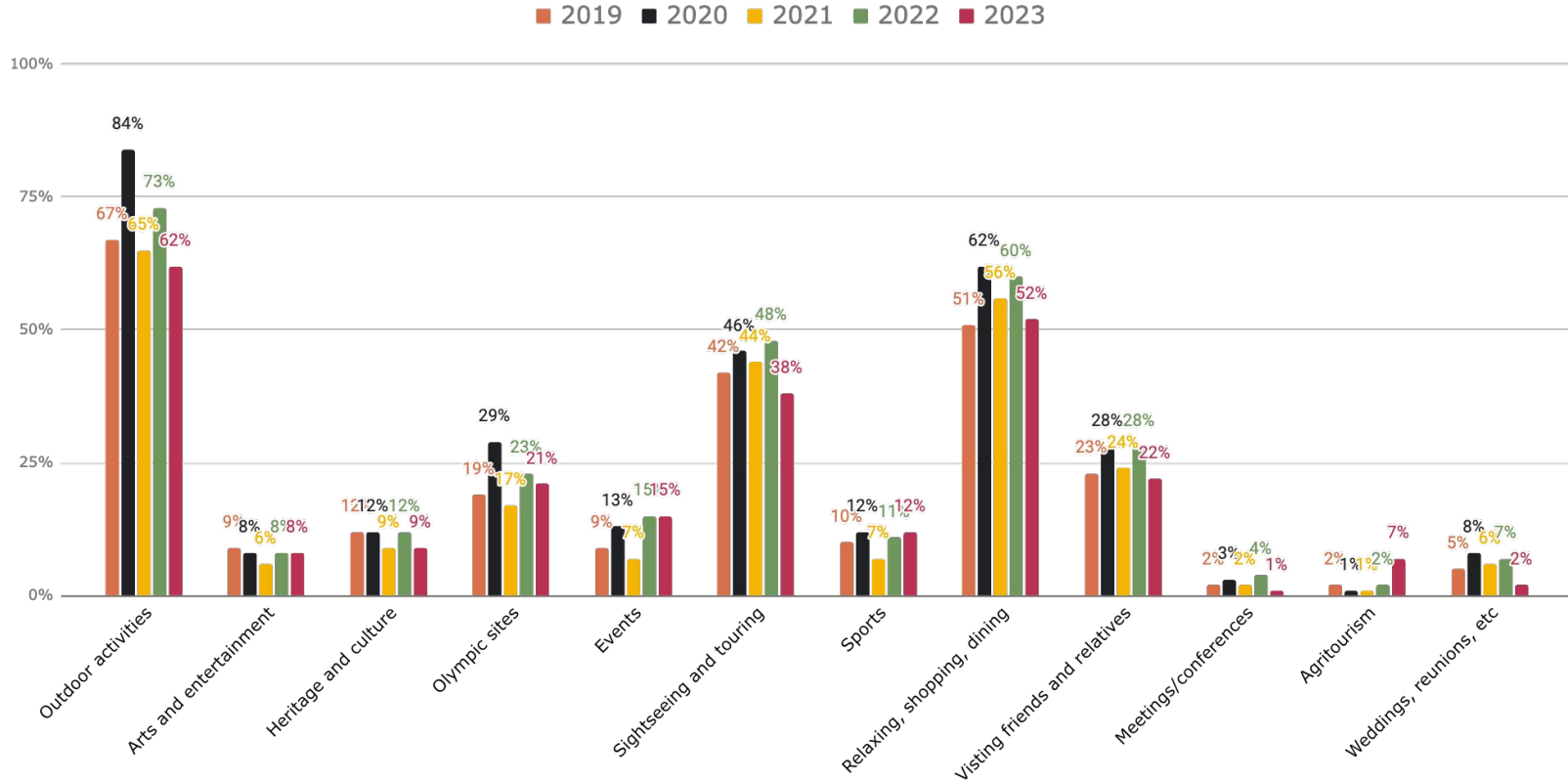
- Hotel/motel/resort
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.)
- Private rental (Airbnb, AdkByOwner, etc.)
- Family/friends
- Second home
- Bed and breakfast



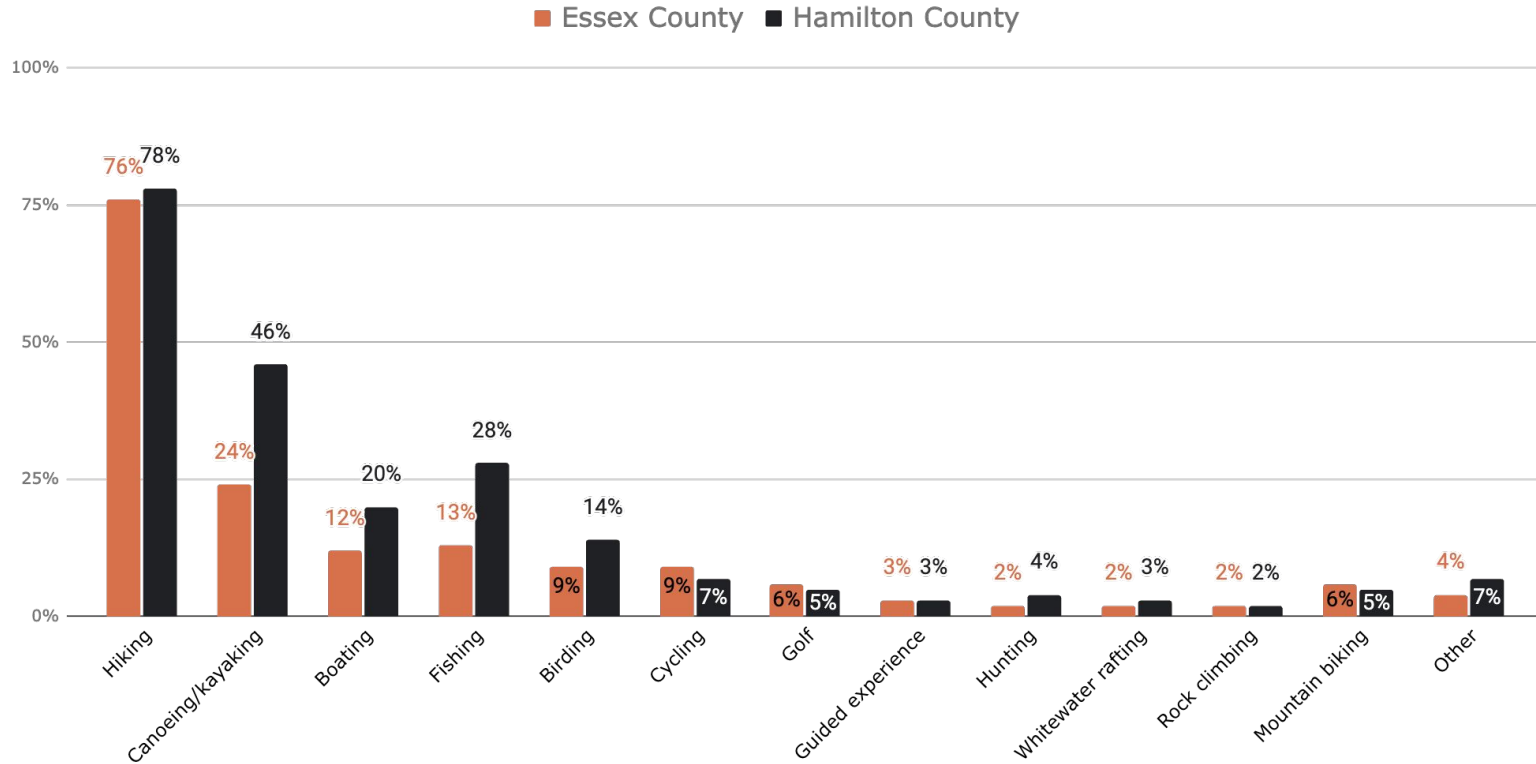
Key attractions



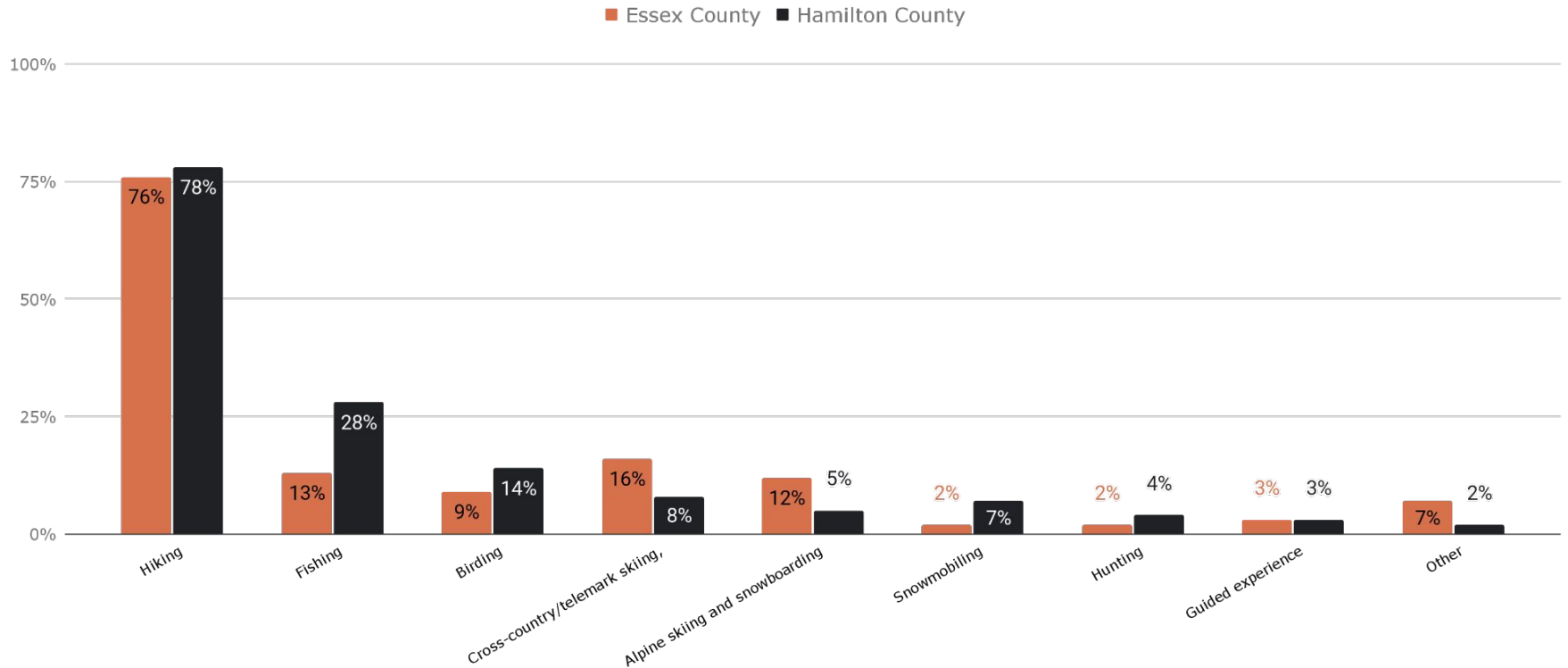
Five year key attractions - Essex County



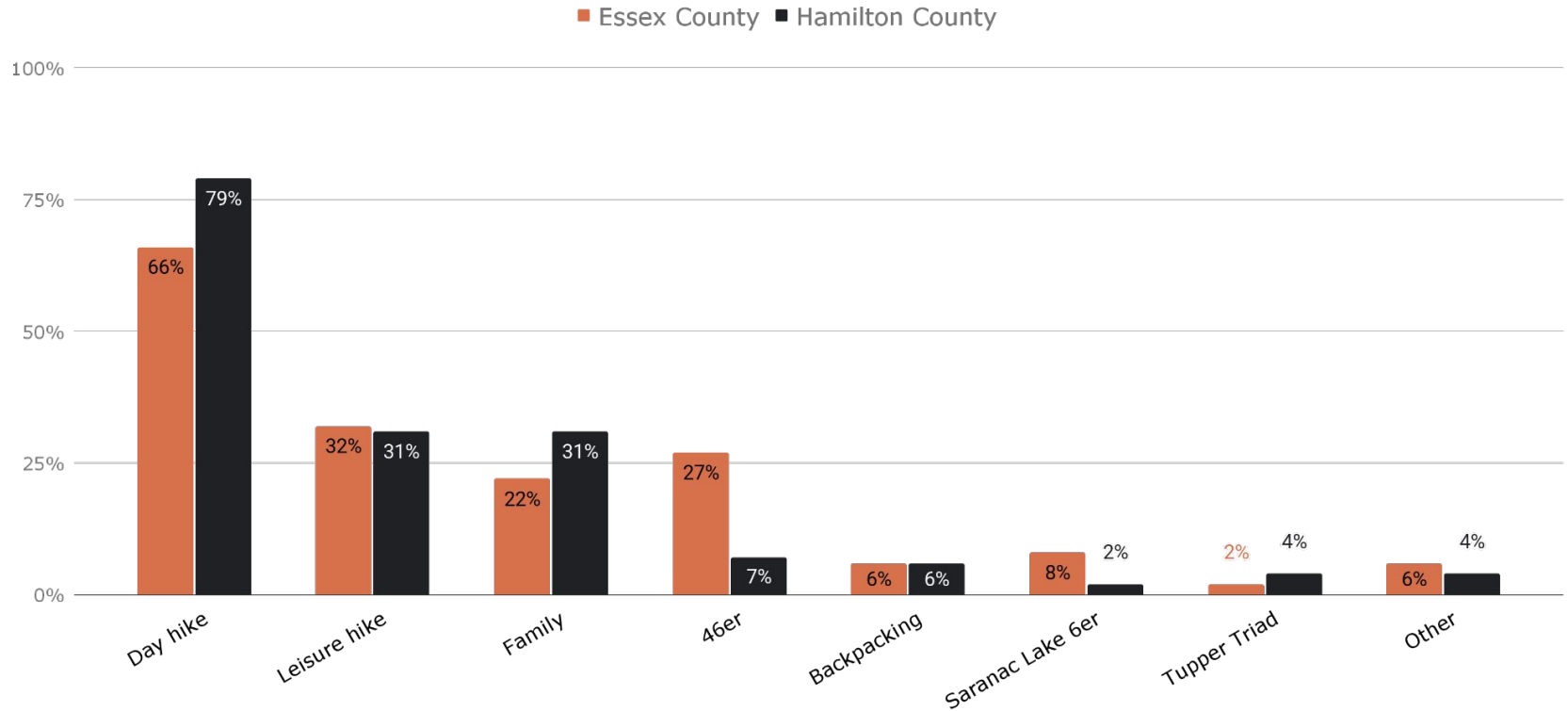
Outdoor Spring/Summer activities



Outdoor Fall/Winter activities

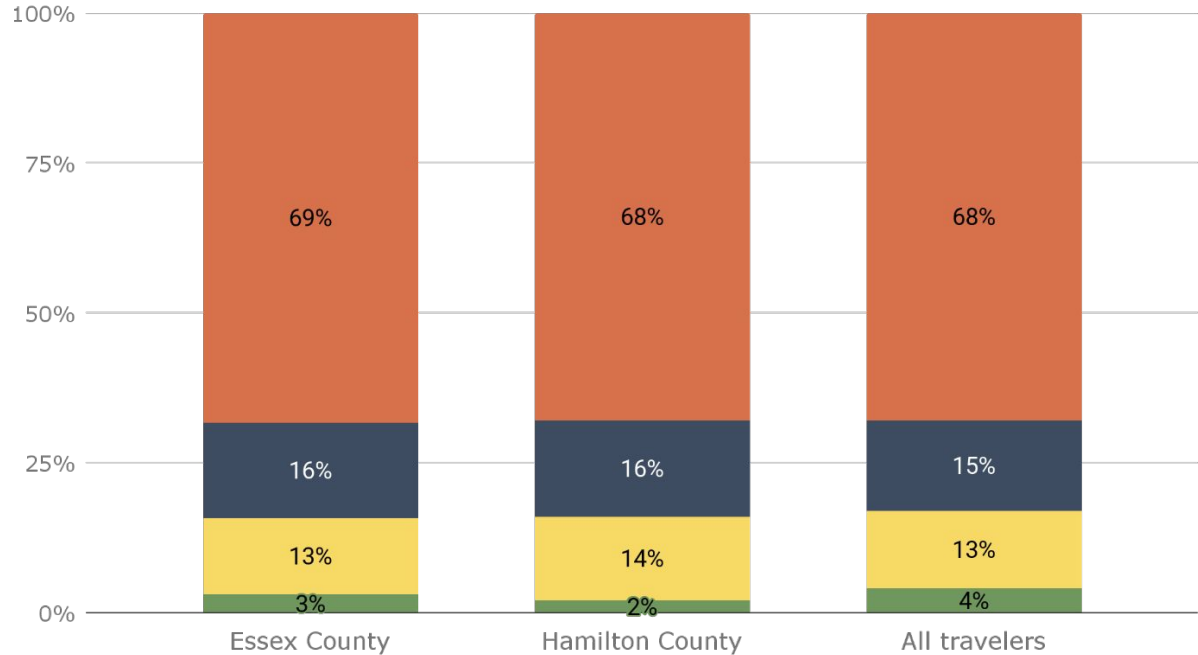


Hiking breakdown



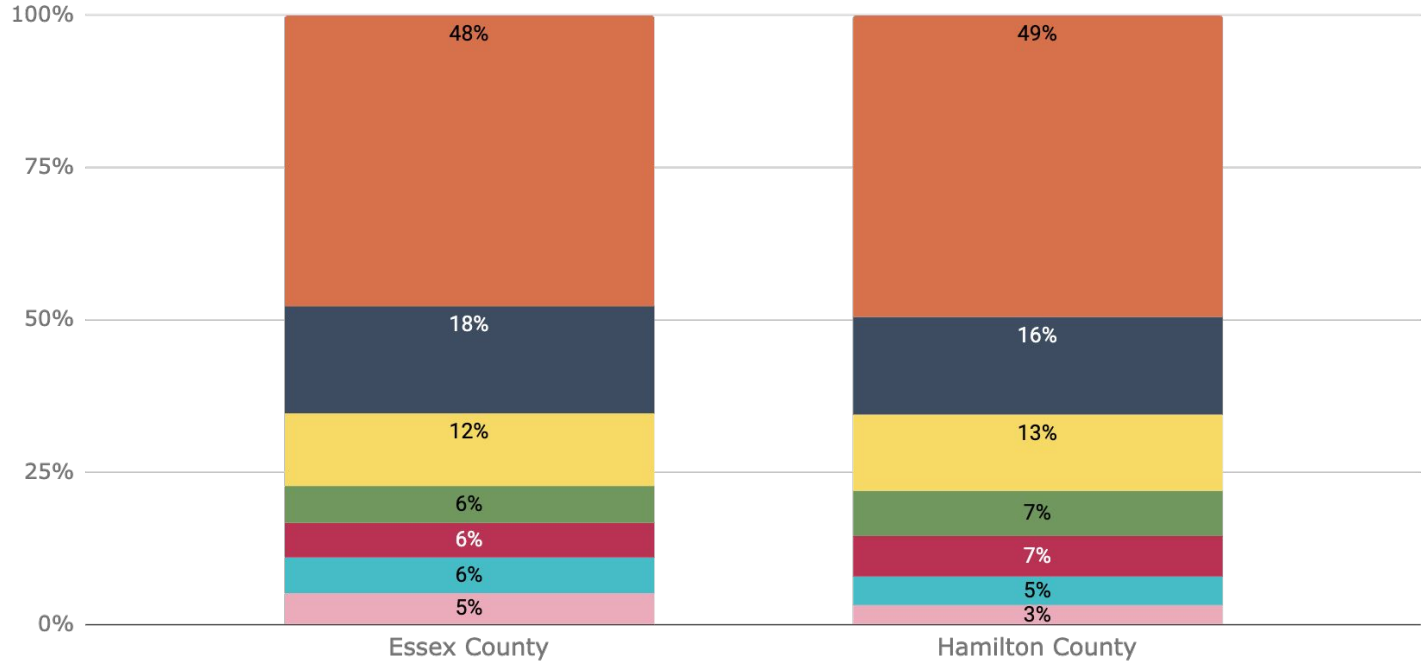
Conversion rate from viewing ROOST marketing materials - Essex and Hamilton counties

- Reinforced my existing plans to visit the Adirondacks
- Might inspire a trip some other time
- Helped me decide to take a trip I had not previously planned
- Was not helpful



Total expenditure allocation by category - Essex and Hamilton counties

- Lodging
- Meals
- Shopping/retail
- Transportation
- Entertainment
- Attractions & events
- All other



Mean party expenditures

	Essex County	Hamilton County	All travelers
Lodging	\$895	\$787	\$868
Meals	\$331	\$254	\$308
Shopping/retail	\$225	\$200	\$228
Transportation	\$112	\$118	\$106
Entertainment	\$109	\$106	\$98
Attractions & events	\$108	\$75	\$112
All other	\$98	\$50	\$48
Average daily expenditure	\$536	\$429	\$491
Average total expenditure	\$1,878	\$1,590	\$1,768

Five year mean party expenditures – Essex County

	2019	2020	2021	2022	2023	Five year average
Lodging	\$499	\$910	\$679	\$950	\$895	\$787
Meals	\$245	\$449	\$287	\$311	\$331	\$325
Shopping/retail	\$200	\$274	\$215	\$220	\$225	\$227
Transportation	\$80	\$71	\$95	\$140	\$112	\$100
Entertainment	\$84	\$67	\$83	\$94	\$109	\$87
Attractions & events	\$84	\$57	\$83	\$100	\$108	\$86
All other	\$68	\$10	\$40	\$80	\$98	\$27
Average daily expenditure	\$419	\$283	\$464	\$512	\$536	\$443
Average total expenditure	\$1,265	\$1,838	\$1,482	\$1,895	\$1,768	\$1,650



Essex County Visitor Profile

Visitor profile – Essex County

- The average visitor party age of respondents was 57 years old, slightly younger from the prior year (58).
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total average of 3.2. This is slightly lower than the reported party size in 2022 (3.1, including 2.6 adults and 0.7 child).
- Sixty-seven percent of visitors (67%) reported that they were New York state residents, which is equivalent to that reported in 2022.
- 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. The proportion of Northeastern state visitors outside of New York state has grown over the last 5 years.

Visitor profile – Essex County

- The average duration of stay reported by 2023 travelers was 3.5 nights, which is slightly below the 5-year average (4 nights).
- Hotels/motels remained the most reported lodging choice among 2023 traveler respondents by a high margin (48%). There was 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.
- 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 (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.

Visitor profile – Essex County

- Just over three out of four (76%) respondents who indicated 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%).
- Respondents were asked 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%).
- Average daily traveler party spending in 2023 is estimated at \$536 per day. This is slightly higher than was reported from 2022 visitors (\$512).
- Total average estimated trip expenditure was \$1,878, nearly equal with 2022 estimated trip expenditure.
- Reported spending on lodging dropped somewhat from the record high of \$950 in 2022 to \$895. All other spending categories showed at least modest increases from the prior year, with only reported transportation spending declining substantially from 2022.



Regional Visitor Impacts

Regional visitor impacts - All travelers

- Average traveler party age of respondents was 58 years old, fairly consistent with the five-year average.
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total of 3.2 persons. This result shows a three-year trend of slightly smaller average party sizes.
- Reported visitation by respondents from New York state rose slightly from prior year to 70% of visits.
- Visitors traveling from central/western New York comprised the largest group of these respondents at 32%, followed by northern New York visitors at 30% of visits, and just under 10% of visitors reporting from downstate New York.
- Northeastern state visitors outside of New York state were consistent from the last two years at 18% of respondents. Seven percent of visitors reported visiting from states outside the Northeast (with the highest proportion (4%) of those from southern U.S. states.
- Canadian visitation climbed slightly from recent years, with 3% of visitors reporting from Quebec and 2% from Ontario.

Regional visitor impacts – All travelers

- Stay length reported by 2023 travelers dropped very slightly from that reported in 2022, to 3.6 nights. This is close to the five-year average duration of stay of 4.1 nights.
- Hotels/motels remained the most frequently reported lodging choice among 2023 traveler respondents (42%), with a growth in reported popularity in comparison to the last several years (where it ranged between 38-40%).
- Reported stays in short-term rental lodging dropped very slightly to 17% (from 18% in the prior year). Fifteen percent (15%) of respondents reported staying with family and friends, 12% reported camping (RV/tents), 11% reported staying in second homes and 3% at bed and breakfasts. These were only slightly different in proportion than reported accommodations in recent years.
- The highest ranking attraction to visit the region continued to be outdoor activities, with 65% of respondents selecting that this was a draw to visit.
- “Relaxing, dining, and shopping” remained another frequently expressed reason to visit the area by 53% of respondents. Sightseeing (40%) and visiting friends (25%) rounded out the top four areas of interest.

Regional visitor impacts – All travelers

- One out of four respondents (25%) reported visiting family and friends as a draw to visitation, consistent with long-term data.
- More than three out of four (77%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of interest.
- Reported interest in canoeing or kayaking was the next most common reported outdoor interest (29%), followed by fishing (17%), boating (14%), and cross-country skiing/snowshoeing (14%). Increases in reported popularity of fishing and cross-country skiing/snowshoeing are notable.
- Respondents were asked what types of arts activities were of interest. The strongest response to this question was live music at 63%. Art galleries represented a strong attraction as well, selected by 43% of respondents. Live theater was a noted attraction to 20% of these respondents.
- Expenditure levels reported by 2023 visitors continued to climb to the highest levels reported in this data collection. The average daily traveler party spending in 2023 was estimated at \$491.
- Total estimated reported trip expenditure was \$1,768 which is slightly higher than reported from the prior year.

Regional visitor impacts - All travelers

- Reported spending on lodging (\$868) climbed 10% from the reported 2022 visitation levels, for three years of “double digit” increases. Reported meal spending climbed slightly from the prior year to \$308.
- Other expenditures categories demonstrated increases as well, except transportation, which declined slightly. This results in a robust total expenditure profile which includes shopping (\$228), entertainment (\$106), transportation (\$112), and attraction/events (\$98). Transportation costs have fallen across profiles in this year, very likely due in part to lower gasoline prices.
- Most expenditure categories reported all-time highs. Reported lodging expenditures continued to make dramatic increases from the prior year and over previous years. These increased levels have the added benefit of improving the occupancy tax revenues that the region can employ to further improve marketing and attraction efforts.
- Daily expenditure levels have been on a steady growth trend even before the last two years of inflation. This is a strong precedent for continued regional economic impact.



Regional ROI Study

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:

$$\begin{aligned} &228,324 \text{ (direct leads)} \\ &\times 82\% \text{ (gross conversion factor)} \\ &\times \$491 \text{ (mean traveler party expenditure per day)} \\ &\times 3.6 \text{ (mean length of stay in nights)} \end{aligned}$$

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2023 is **\$330,940,112.**

Return on investment (ROI) - All travelers

The estimated return on investment is calculated by dividing the total revenue generated by travelers by the total marketing dollars spent by ROOST:

$$\begin{array}{l} \$330,940,112 \text{ (total estimated traveler revenue)} \\ \div \$3,886,747 \text{ (total ROOST marketing expenditures)} \end{array}$$

This produces a conservatively-estimated ROI of 91:1 in leisure traveler-related revenue for every marketing dollar expended.