

**2023 REGIONAL TRAVELER DATA/
MARKETING ANALYSIS:
*ESSEX and HAMILTON COUNTIES, NY-
ADIRONDACK REGION***



**Prepared by: PlaceMaking
April 2024**

BACKGROUND

The Regional Office of Sustainable Tourism (ROOST) managed the marketing tourism assets for Essex County, Hamilton County, the Village of Tupper Lake, and the Village of Saranac Lake in Franklin County, New York in 2023. The agency commissioned a study to determine visitor information at the county levels and to gauge key regional marketing program statistics. This year's study marks 20 years of ROOST and partners completing this visitor research.

ROOST contracted with PlaceMaking, a regional community and economic development research firm, to complete this research. ROOST sent a jointly created survey tool to a sample of its 2023 leisure travelers to the region. 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 this portion of the Adirondack region.

Results from 2023 visitation survey analysis show continued strong travel recovery from the pandemic years. Regional traveler data and a summary marketing/return on investment (ROI) analysis are provided in this briefing. These data exclude group and business market segments.

The end-product of 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 a total of 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.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the twelfth year. The study has employed similar methodology with comparable results for 20 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.

Survey results are parsed by where the traveler indicated spending the most time to achieve individual county level results; these results are analyzed together as the basis for this report. 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 over time.

The survey was distributed electronically by ROOST to a sampling of its electronic database of visitors or parties inquiring about visitation to the Adirondack region during 2023. Surveys were collected quarterly throughout 2023. Within the month following each travel quarter the survey was delivered electronically to a sampling of visitors who had inquired about traveling during that period. This method of collection allows surveys to be modified slightly by seasonal activities and particularly to improve trip data recollection near to the actual date of travel.

Those invited to participate in the survey represent traceable direct inquiries generated by the office's marketing efforts. This includes respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter, Facebook, YouTube and Instagram), website, printed materials and in-person visits. Potential visitors provide their contact information so they may be identified as unique respondents. This study does not take into consideration the potentially large group of individuals who view travel materials via websites, etc., are subsequently influenced to travel to the area, but do not provide traceable information to the agency.

The survey instrument was predicated on national and regional research with a similar purpose and refined based on the experience of tourism professionals. The online 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.

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 consistent 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.

SUMMARY TRAVELER DATA

Highlights of 2023 visitation to the region included:

Demographics and Visit Information

- Over 230,000 individuals contacted ROOST via its various outlets for travel information about the region in 2023. This is a near record level during this data collection and a 7% increase from the prior year.
- 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 children, for a total of 3.2 persons. This result shows a three-year trend of slightly smaller average party sizes.
- Respondents included 58% females, 42% male.
- Just over ninety-four percent (94.6%) of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Asian and Hispanic. Less than 1% of respondents reported African American/Black and nearly 3% reported mixed race (slight increase during last two years).
- Reported visitation by respondents from New York state rose very 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 post pandemic years, with 3% of visitors reporting from Quebec and 2% from Ontario.

- 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.

Interests

- 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. While these most commonly reported attractions to visit stayed in their respective places of order, all showed slight declines by 1-3 percentage points.
- One out of four respondents (25%) reported visiting family and friends as a draw to visitation, consistent with long-term data.
- Seventeen percent (17%) of respondents reported visiting Olympic sites and events as an attraction, rising from 13% in the year prior. Reported interest in events rose somewhat from the prior year to 14% of respondents.
- 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.

- Ten percent (10%) of respondents indicated interest in birding and downhill skiing/snow-boarding.
- A question regarding hiking preferences continues to indicate a five-year trend of strong preference in casual hiking, with 69% of respondents indicating interest in day hikes, 31% leisure and hard surface hiking and 24% family hikes. Forty-sixer level hike interest has remained at a still-substantial 21%.
- A new question was asked this year for those who responded that they were interested in arts and entertainment. These respondents were queried 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.

Traveler Spending and Conversion

- 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 just under \$500 (\$491).
- The total estimated reported trip expenditure was \$1,768 which is slightly higher than reported from the prior year.
- 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 expenditure 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.

- Conversion measurement, representing 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%, roughly equal to the five-year average of 81%.

ESTIMATED TRAVELERS

The 2023 estimated traveler count is tabulated by multiplying the number of *traceable* leads generated by ROOST (those who contacted their office during 2023 for information through all sources) by the conversion factor and by the average party size (determined by the survey).

228,324 (direct leads) x 82% (gross conversion factor) x 3.2 (average party size)

Estimated travelers in 2023= 599,122

The number of travelers influenced by ROOST in visiting the region in 2023 is estimated at nearly 600,000. This is very near to the estimated visitors influenced by ROOST to the region from 2021 and 2022 data.

RETURN ON INVESTMENT

Researchers measured return on investment (ROI) by estimating expenditures generated by direct expenditures of travelers and divided by the total marketing dollars spent by ROOST.

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

*228,324 (number of direct, traceable inquiries) x 82% (gross conversion factor)
x \$491 (mean traveler party expenditure per day) x 3.6 (mean length of stay in nights)*

= \$330,940,112

(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 travelers by the marketing dollars spent by the total ROOST marketing budget:

\$330,940,112 (total estimated traveler revenue) / \$3,886,747 (total ROOST marketing expenditures)

Return on Investment (ROI) = 91:1

The above calculations show that the total estimated revenue generated by travelers influenced by ROOST was over \$330 million in 2023, a 10% increase from the 2022 estimated revenue (adding to many continuing years of measurable increases). This produces a conservatively- estimated ROI of \$91 in leisure traveler-related revenue for every marketing dollar expended. While this is slightly lower than the 94:1 ROI from 2022 visitors, it is well above the five-year average of 81:1. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would create a much greater impact.

CONCLUSIONS

ROOST continues to lead destination marketing in growing its destination assets and visitor expenditures. Visitor data in this year continue to look more typical in comparison to the 2020/2021 pandemic years. A return to sports tournaments and events provided a boost to visitor numbers and dollars spent, especially the World University Games in January of 2023.

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%). Average lodging costs reported in this survey dropped from the prior reported year, following two years of extreme growth. This may be in part explained by an increase in supply of 8% in Essex County.

Visitor party sizes have decreased, in particular to the increase seen during the pandemic. Length of stay after having retracted for many years (and rising significantly during the pandemic) appears to be stabilizing “in the middle” of those variations during the last two years.

For the first time in the years of this data collection, the proportion of visitors reporting staying in a hotel/motel climbed slightly in 2023. Short-term rentals remain a strong secondary accommodation selection, but the proportion reported dropped very slightly this year, not climbing as it had the last 5+ years. Caps on new short-term rentals in key markets may have contributed to this stabilization.

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.

The U.S. Travel Association predicts domestic travel to stay strong in 2024 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 (the data source) reports the travel market expanding substantially due to greater ease of mobility and improved awareness of destinations due to widely accessible information³.

ROOST has well-positioned its marketing to address this Adirondack region's travel opportunities. Estimated spending rose nearly 5% in comparison to 2022. The year's return on investment (ROI) from marketing expenditures is 91:1. This is well above the 5-year average of 81:1. These figures show growth in reaching visitors and continued positive revenue impacts.

ROOST and the research team continue to discuss the broader impact of regional tourism on Adirondack regional visitor assets and areas by which to expand traveler data collection accordingly. ROOST is a leader in destination management through continually investing in visitor experience and manners to measure such. The study at a regional level provides a benchmark in measuring ROI on marketing investments for the two-county region and the Villages of Tupper Lake and Saranac Lake in Franklin County. It may also enhance and improve evaluation of future marketing efforts, opportunities, and marketing channels for 2024 visitors and beyond.

Five-year key statistics data are attached in Table 1.

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex County NY". 2024.
2. U.S. Travel Association. "Travel- Forecasts" ustravel.org 1/17/24
3. Statista.com. "Domestic Travel Summary"

TABLE 1. 5-YEAR SUMMARY TABLE OF KEY REGIONAL ROI DATA

	5-Year Average*	2023	2022	2021	2020	2019*
Number of Completed Survey Responses for this Adk Region	5,532	9,717	3,293	6,161	3,593	4,449
Mean Income of Respondents (by \$10,000 range)**	\$103,341	\$112,000	\$105,800	\$100,000**	\$100,000**	\$98,907
Mean Age of Respondents	56	58	58	58	53	56
Direct Inquiries to ROOST for Region	238,315	228,324	215,944	211,930	168,089	367,288
Average Night Stays/Party	4.1 Nights	3.6 Nights	3.7 Nights	3.4 Nights	5 Nights	3.1 Nights
Average Party Size	3.8 Persons	3.2 Persons	3.4 Persons	3.7 Persons	5 Persons	3.5 Persons
Conversion Factor Rate	81%	85%	82%	80%	80%	80%

Average Daily Expenditure per Party	\$407	\$491	\$459	\$421	\$283	\$383
Average Total Expenditure per Party per Trip	\$1,543	\$1,768	\$1,697	\$1,390	\$1,667	\$1,191
Marketing Budget	\$3,566,110	\$3,630,220	\$3,188,710	\$3,232,178	\$3,266,422	\$4,512,724
ROI	81:1	91:1	94:1	75:1	70:1	74:1
*Data from 2019 also included the whole of Franklin County						
**2020 and 2021 data include only median income, making the "average" of these five years an approximation						