



Adirondacks, NY

2015 Visitor Report

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Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides an overview for the Adirondacks Region's domestic tourism business in 2015.

Methodology



- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Travel USA®** survey:
 - *Selected to be representative of the U.S. adult population*
- For the 2015 travel year, this yielded :
 - 337,164 trips for analysis nationally:
 - 237,555 overnight trips
 - 99,609 day trips
- For the Adirondacks Region, the following sample was achieved in 2015 :
 - 1512 trips:
 - 1138 overnight trips
 - 374 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings

Key Findings



- “Visiting Friends and Relatives” was the main purpose of overnight trip for 45% of Adirondacks visitors. Among marketable trips, which accounted for 50% of total trips, “Outdoors” and “Touring” were among the highest at 14% each.
- Both the Adirondacks region (50%) and Lake Placid (60%) exhibit higher than normal Marketable trip percentages. It appears that Lake Placid is driving the Adirondacks region results
- The top state markets for Adirondacks visitors are New York State, Florida, California and Massachusetts. The top 3 DMA Origin of visitors to the Adirondacks region were New York, Albany and Syracuse.

Key Findings (Cont'd)



- The summer season is the busiest for the Adirondacks region while Lake Placid gets a more consistent visitation throughout the year
- Visitors to the Adirondacks region tend to have shorter planning period than Lake Placid.
- “Advice from Friends and Relatives” is the main source of information for the Adirondacks region.
- Lake Placid visitors are more likely to use “Travel Agents/ Tour Company/Specialty Travel”, “Auto Clubs”, and “Airline/ Commercial Carriers” to obtain information.

Key Findings (Cont'd)



- ◉ Lake Placid visitors are more likely to use commercial transportation while Adirondacks region visitors are more likely to use their own vehicle
- ◉ Lake Placid visitors are more likely to stay in commercial accommodations while Adirondacks region visitors are more likely to stay with friends and relatives
- ◉ 59% of overnight visitors to the Adirondacks region were very satisfied with their overall trip experience. However, this is below the US Norm. The Adirondacks region outperformed the US Norm for “Music/nightlife/entertainment”.
- ◉ Visitors to Lake Placid skewed younger and male compared to the Adirondacks region.

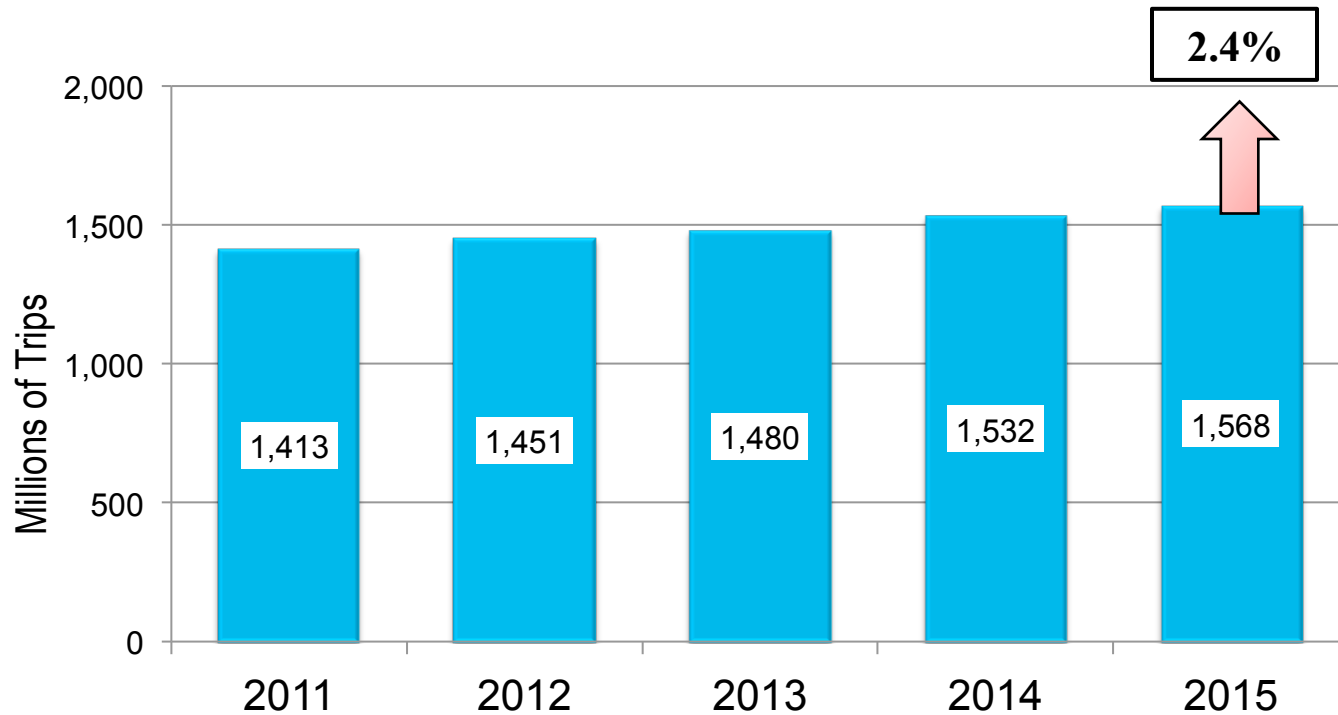


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



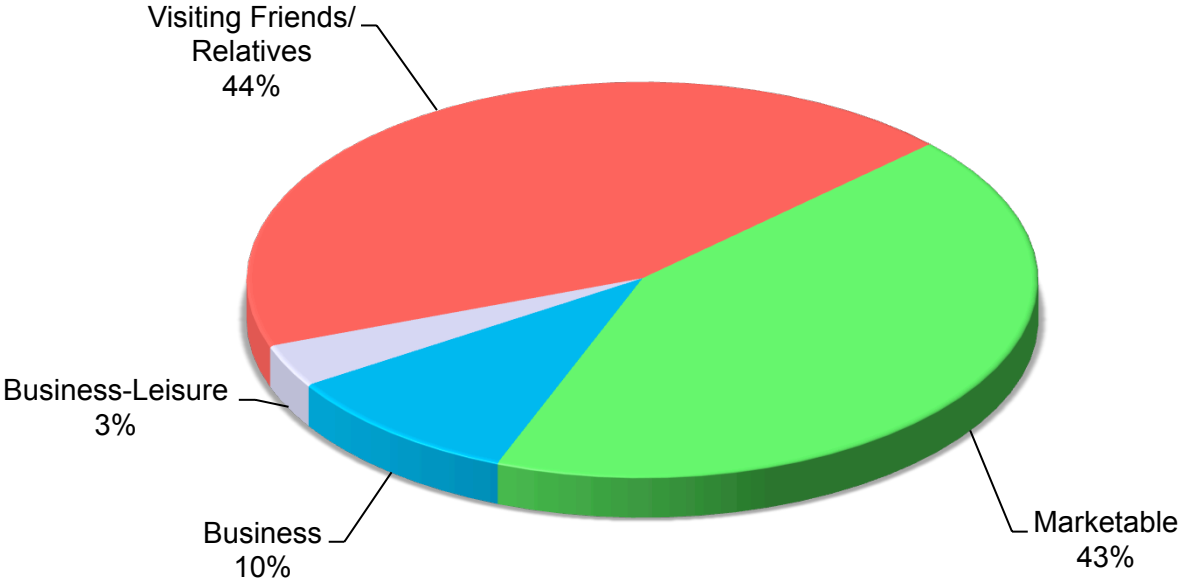
Base: Total Overnight Person-Trips



Structure of the U.S. Travel Market — 2015 Overnight Trips



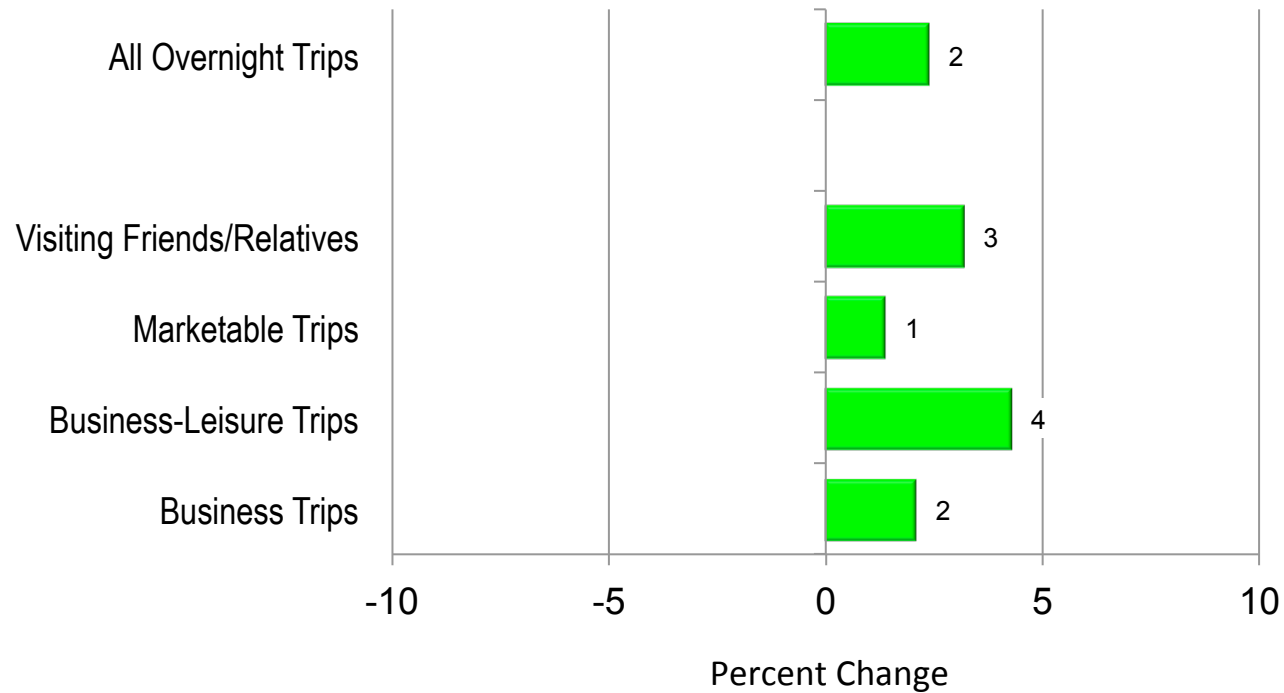
Base: Total Overnight Person-Trips



U.S. Market Trends for Overnight Trips — 2015 vs. 2014



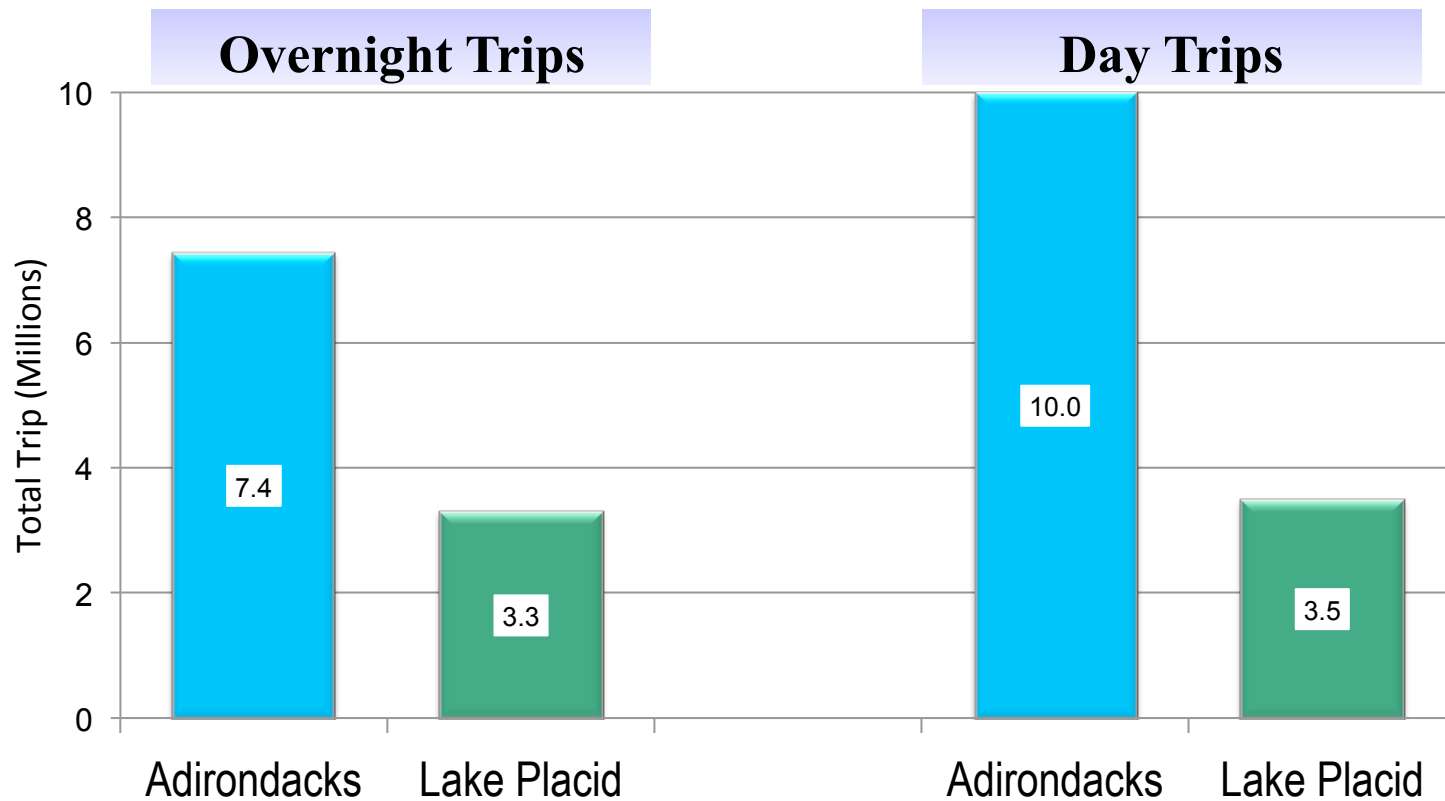
Base: Total Overnight Person-Trips





Size & Structure of the Domestic Travel Market – Adirondack Region & Lake Placid

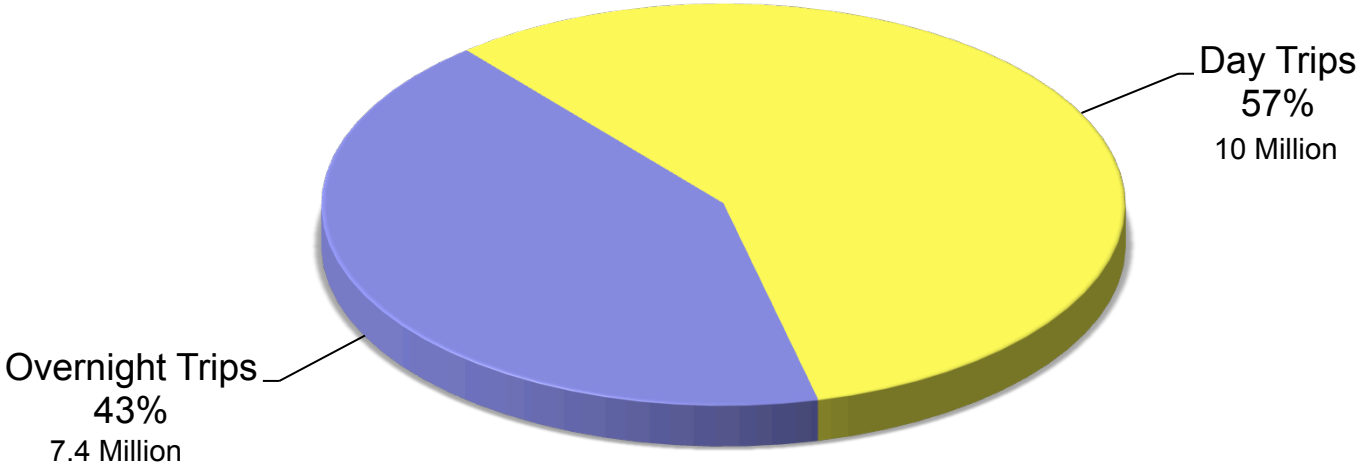
Total Market Size – Adirondacks & Lake Placid



Total Size of Adirondacks Region Travel Market



Total Trips* = 17.4 Million



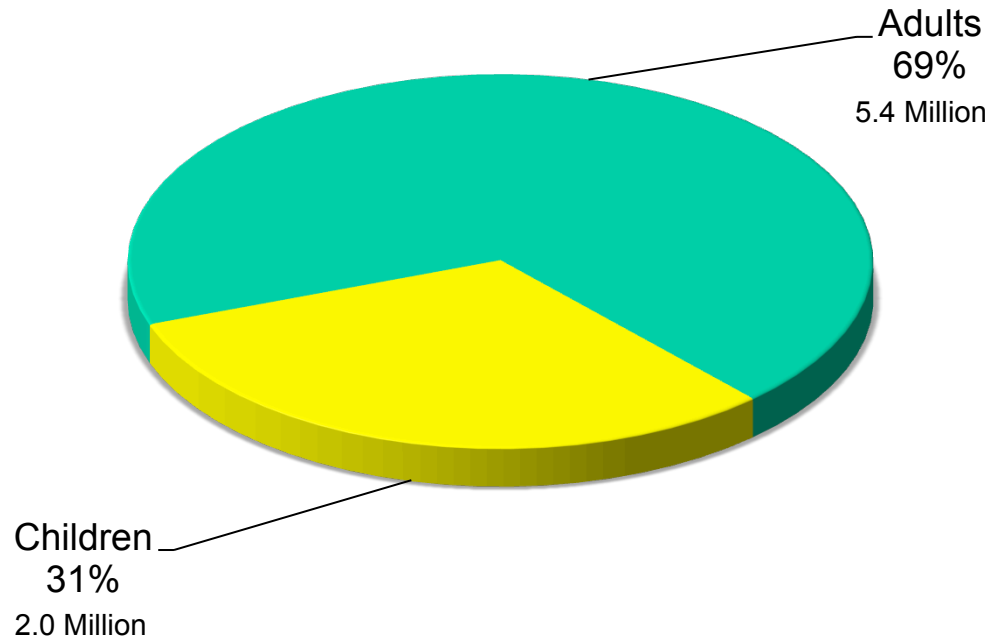
*Total volume includes both adults and children

Adirondacks Overnight Travel Market — Adults vs. Children



Base: Overnight Trips to Adirondacks

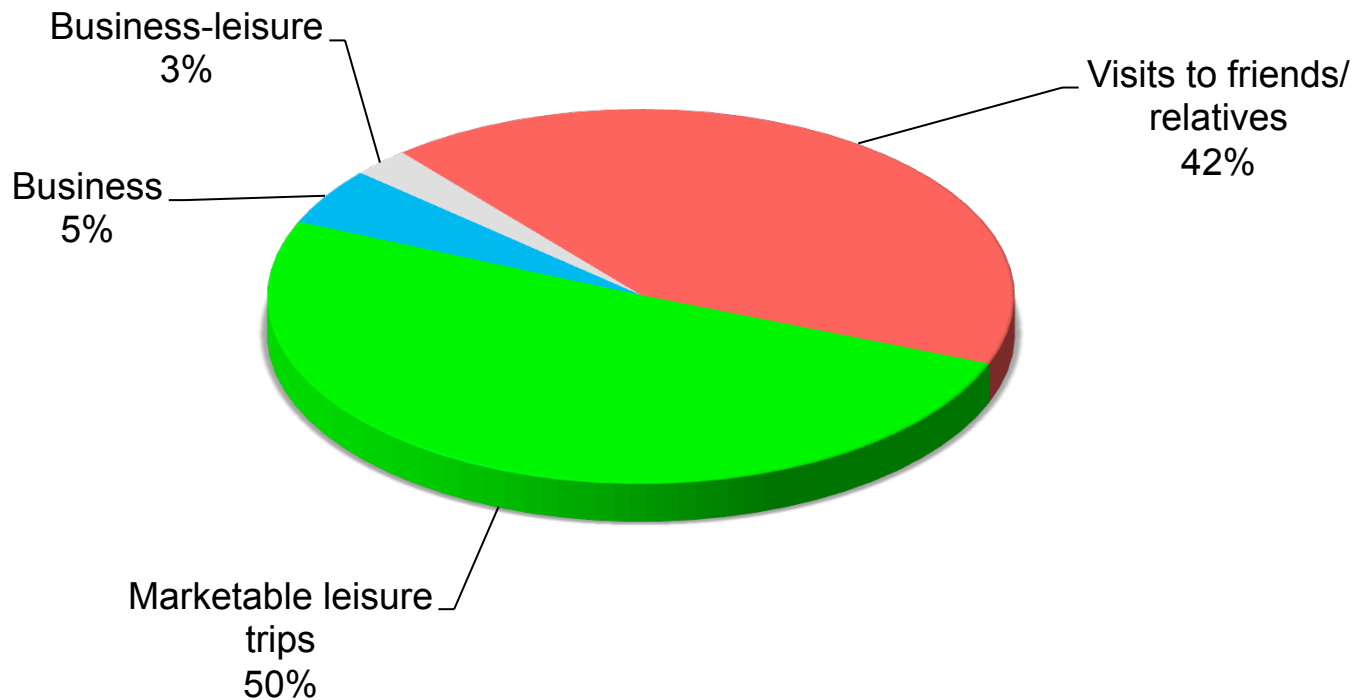
Total Trips = 7.4 Million



Adirondacks Overnight Travel Market — by Trip Purpose



Base: Overnight Trips to Adirondacks

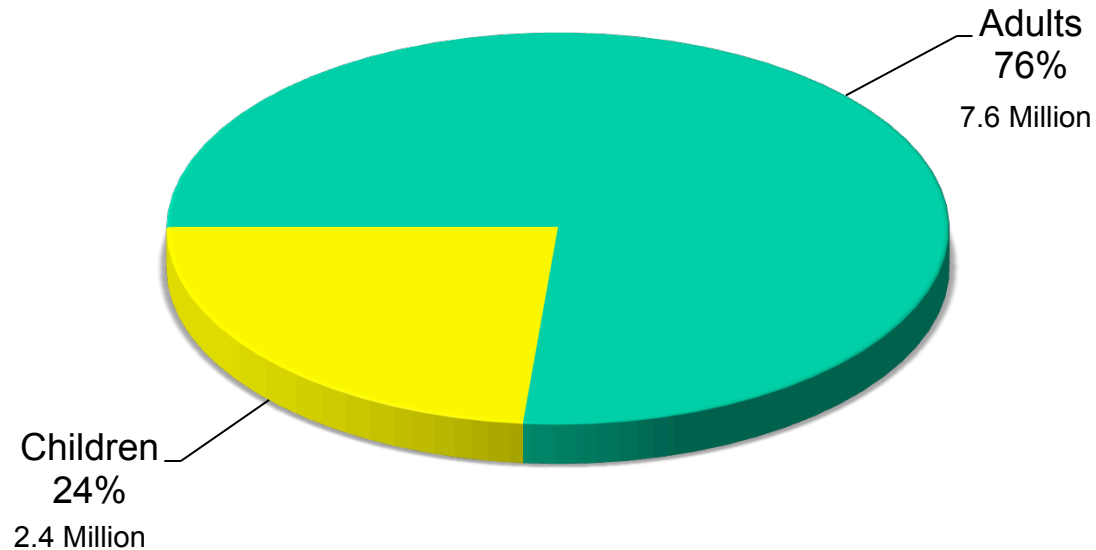


Adirondacks Day Travel Market — Adults vs. Children



Base: Day Trips to Adirondacks

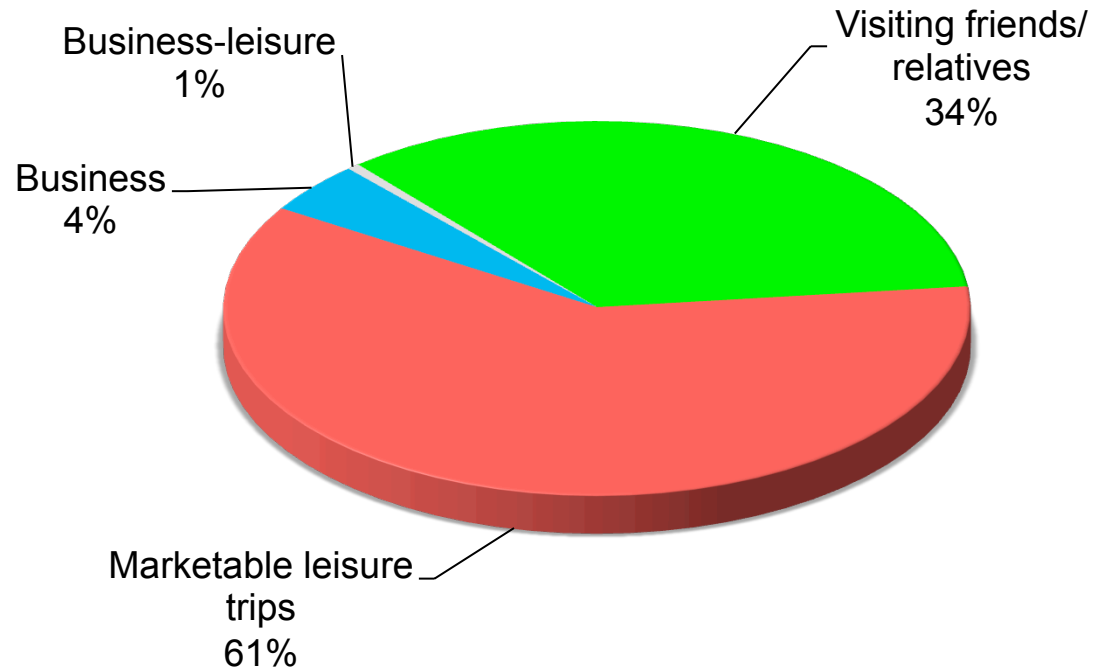
Total Day Trips = 10.0 Million



Adirondacks Day Travel Market — by Trip Purpose



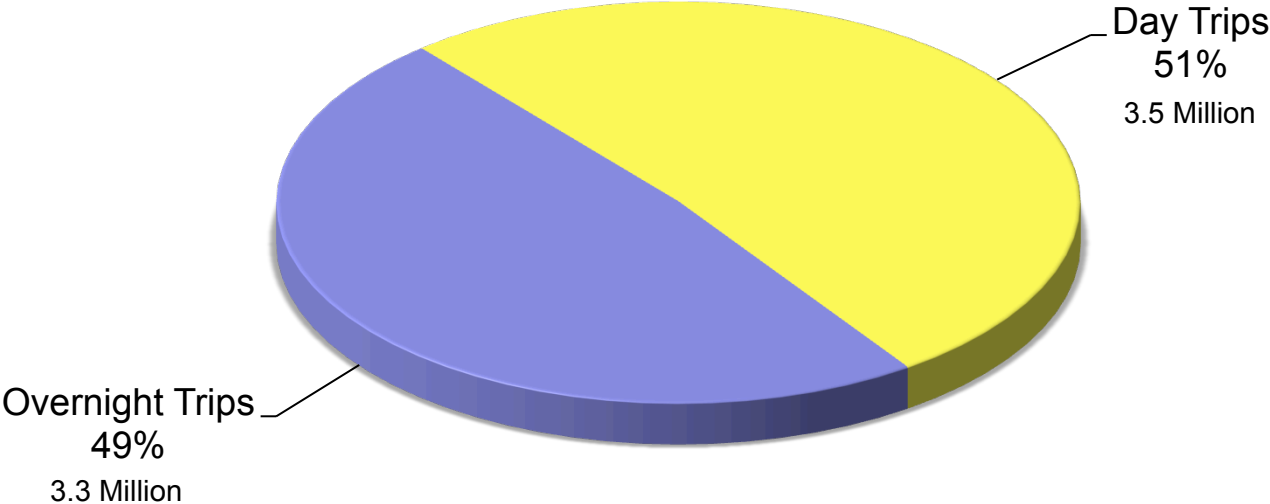
Base: Day Trips to Adirondacks



Total Size of Lake Placid Travel Market



Total Trips* = 6.8 Million



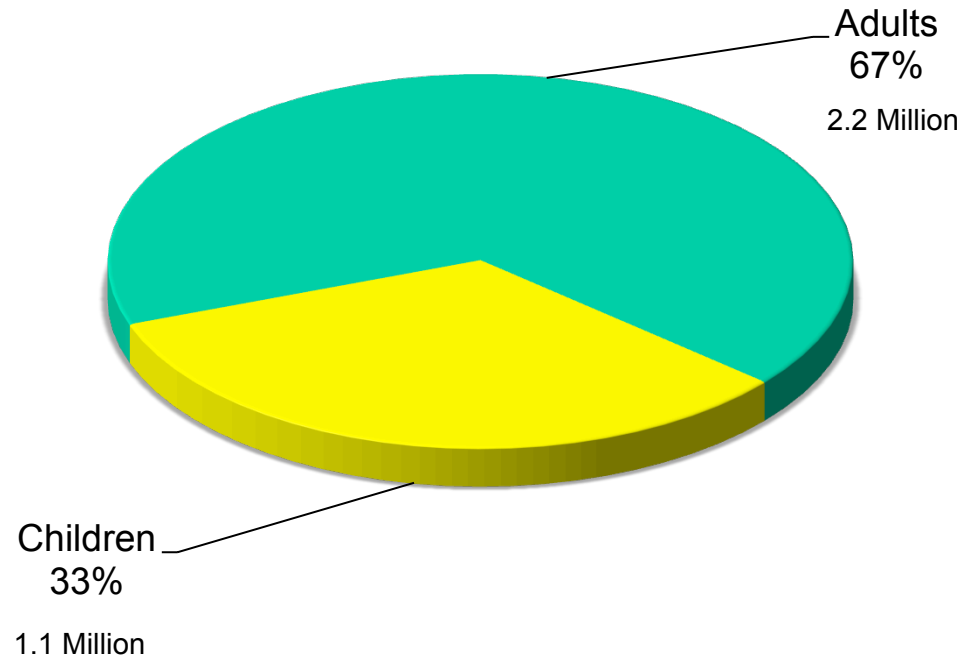
*Total volume includes both adults and children

Lake Placid Overnight Travel Market — Adults vs. Children



Base: Overnight Trips to Lake Placid

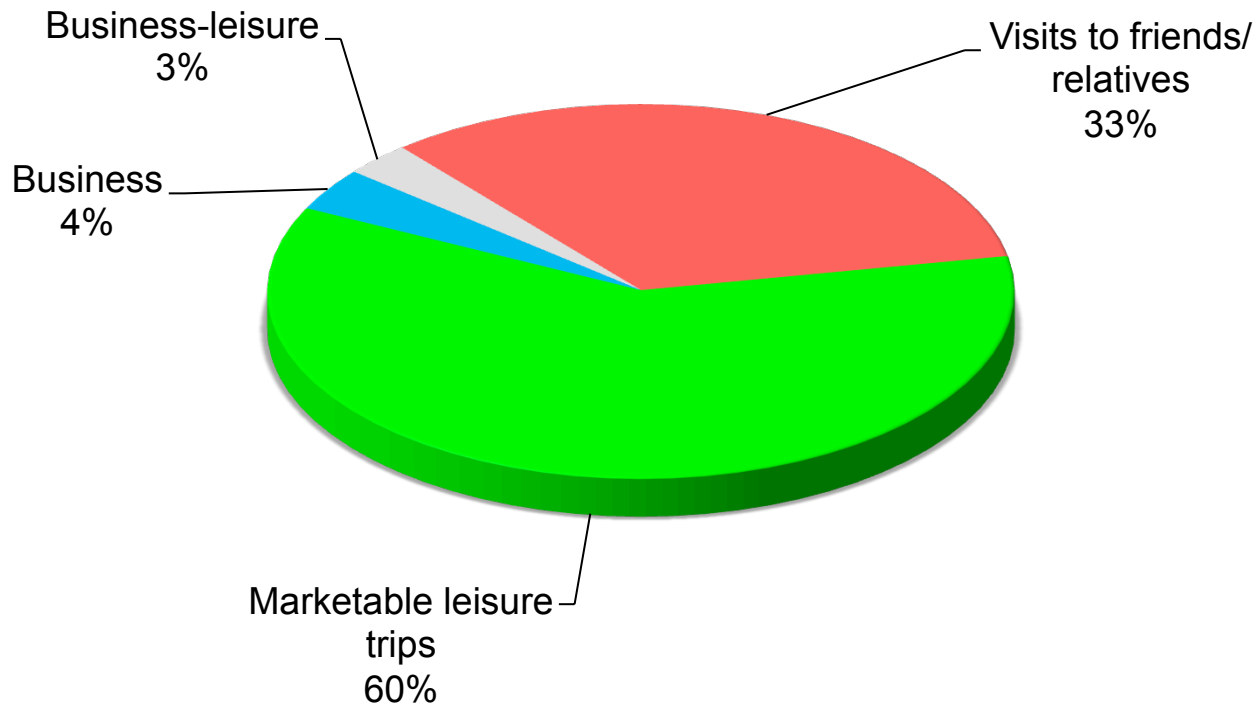
Total Trips = 3.3 Million



Lake Placid Overnight Travel Market — by Trip Purpose



Base: Overnight Trips to Lake Placid

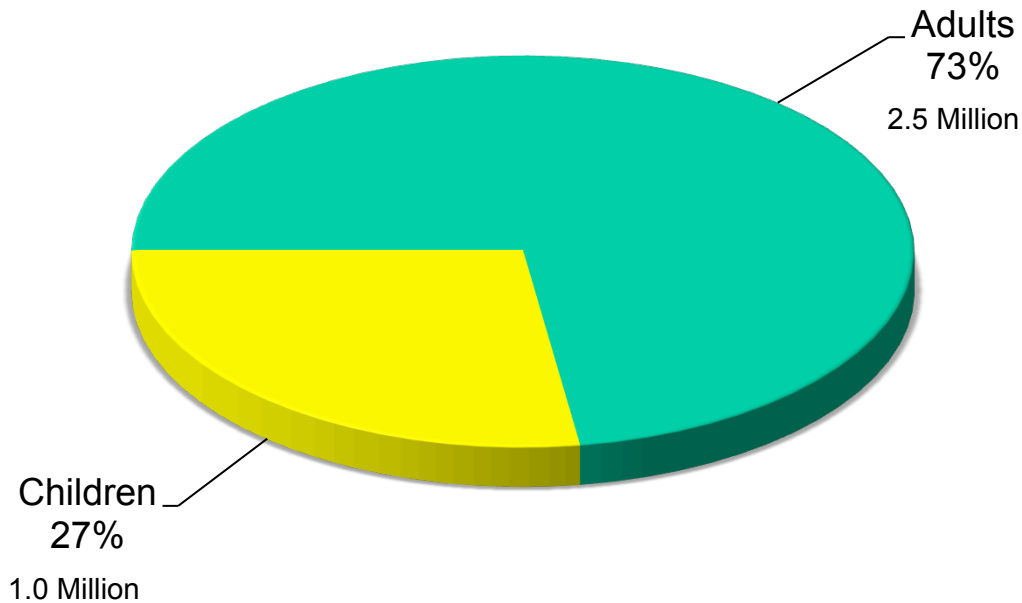


Lake Placid Day Travel Market — Adults vs. Children



Base: Day Trips to Lake Placid

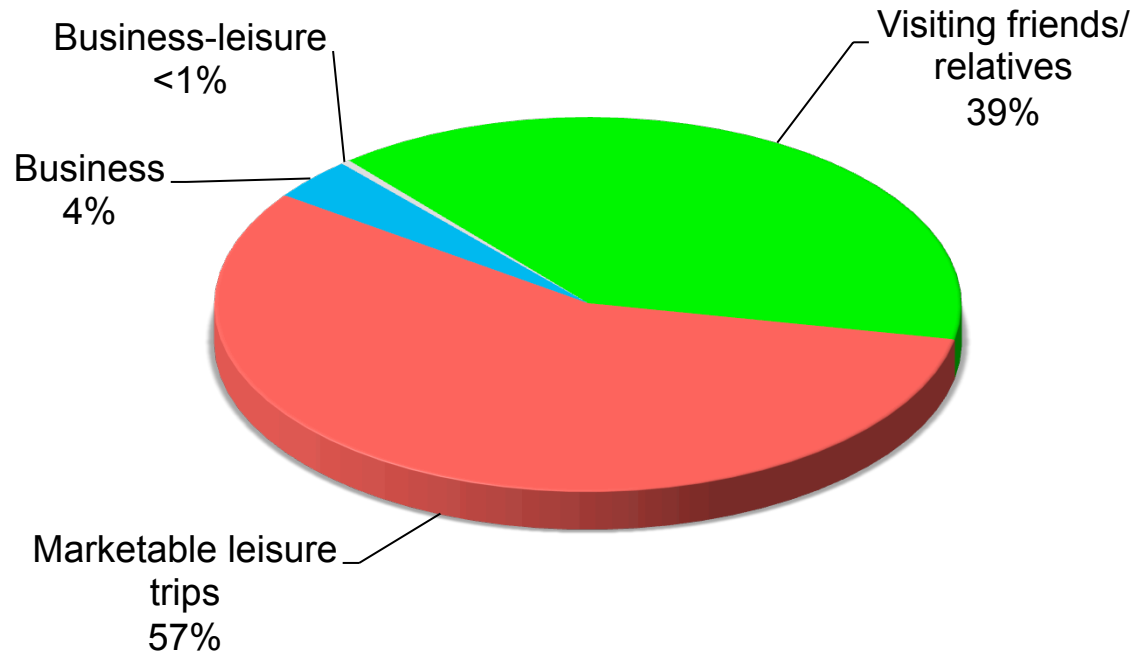
Total Day Trips = 3.5 Million



Lake Placid Day Travel Market — by Trip Purpose



Base: Day Trips to Lake Placid



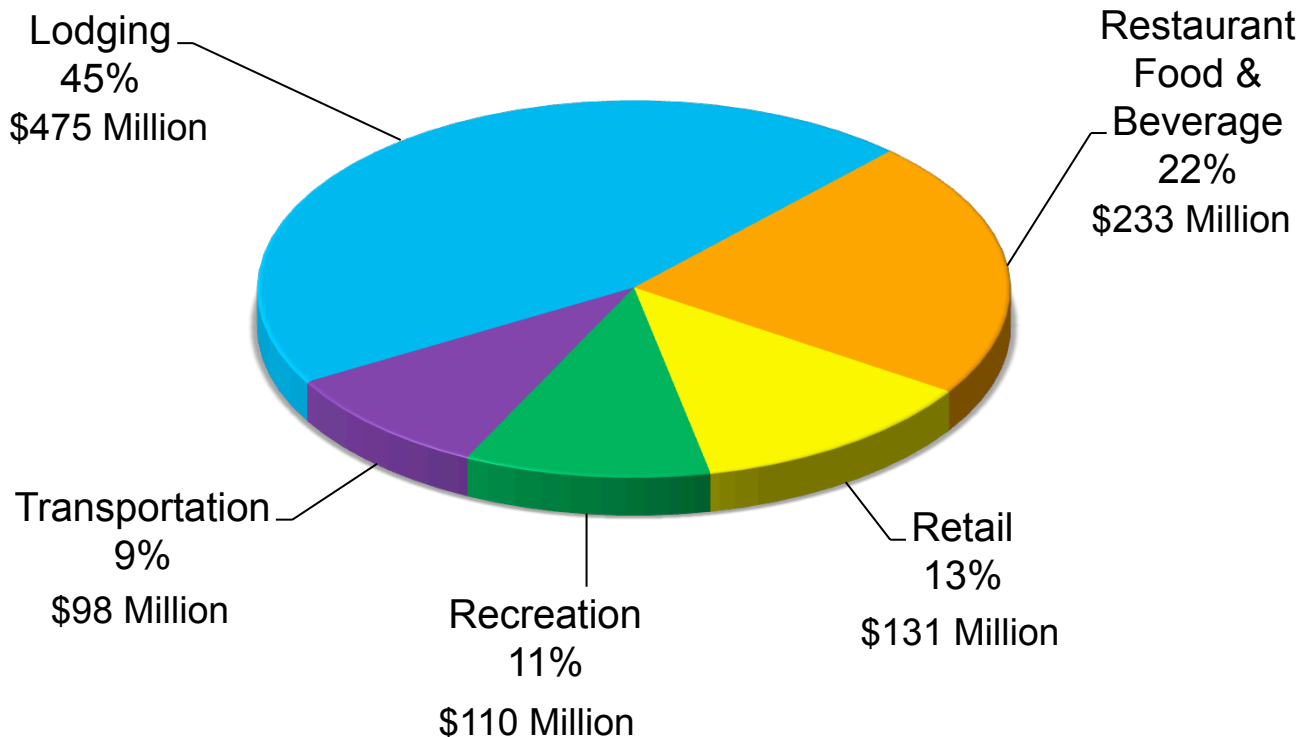


Overnight Expenditures – Adirondacks Region

Total Overnight Spending in Adirondacks — by Sector



Total Spending = \$1.05 billion

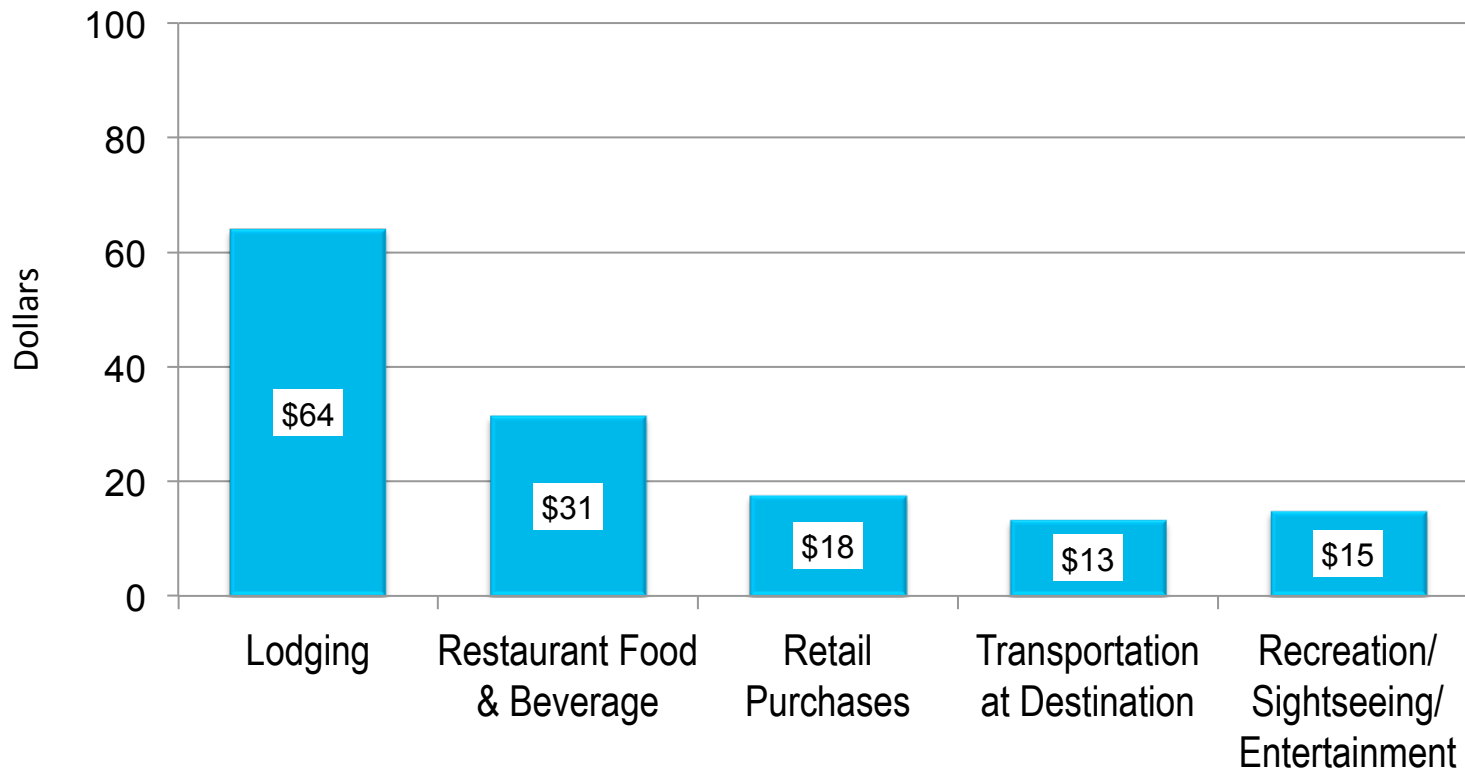


Average Per Person Expenditures on Overnight Trips — By Sector



Base: Overnight Trips to Adirondacks

Total Per Person* = \$141



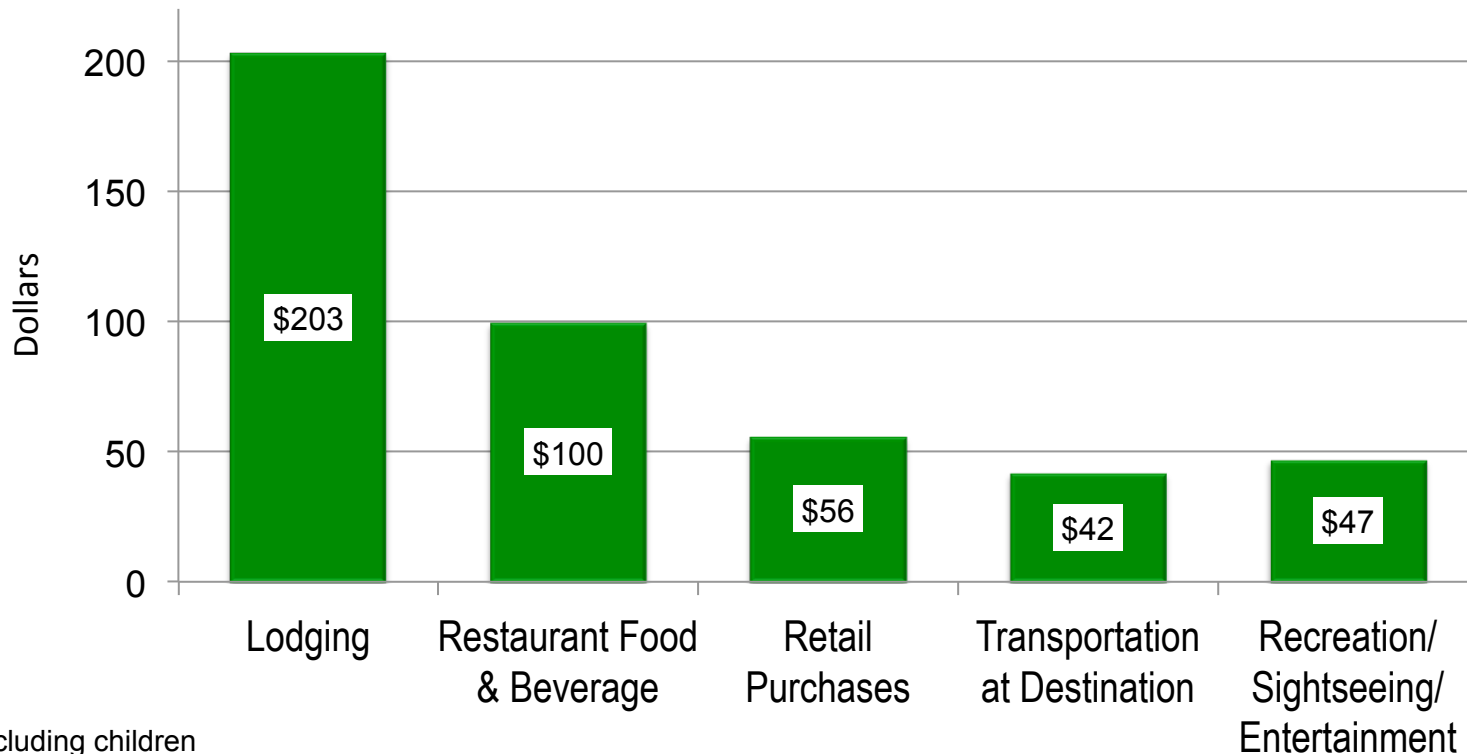
*Including children

Average Per Party Expenditures on Overnight Trips



Base: Overnight Trips to Adirondacks

Total Per Party* = \$448



*Including children

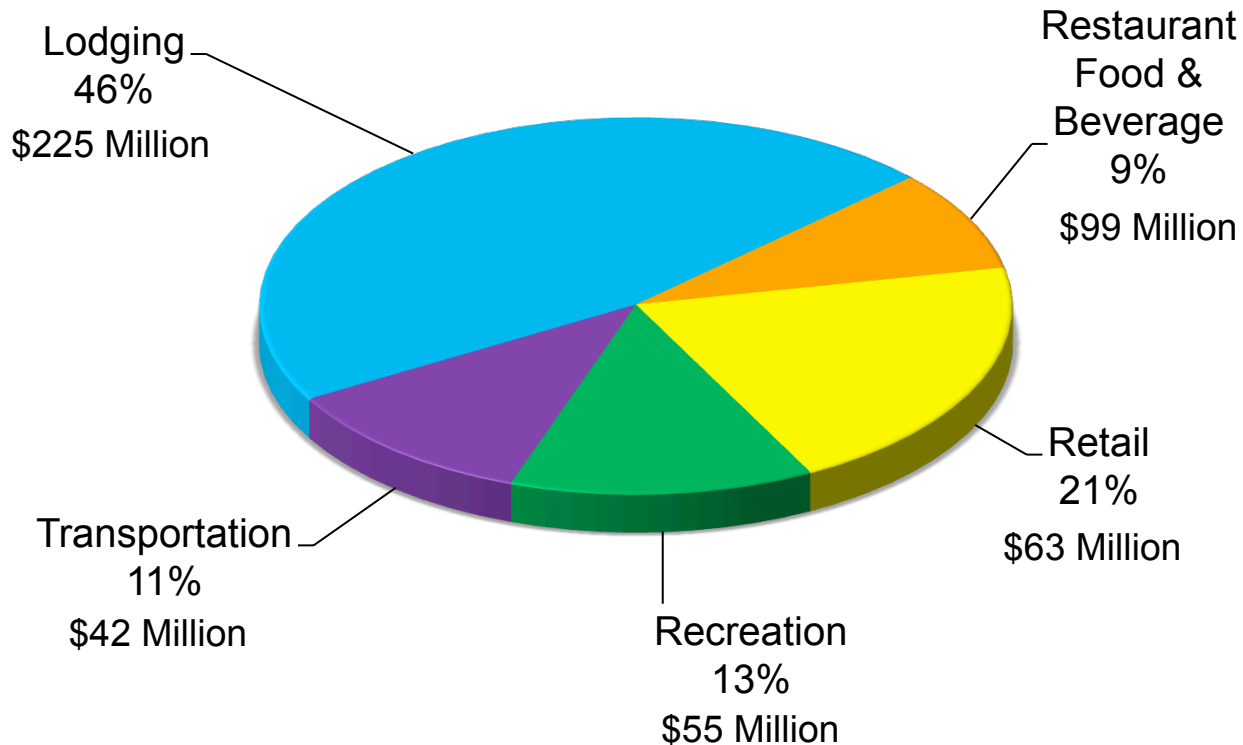


Overnight Expenditures – Lake Placid

Total Overnight Spending in Lake Placid — by Sector



Total Spending = \$484 million

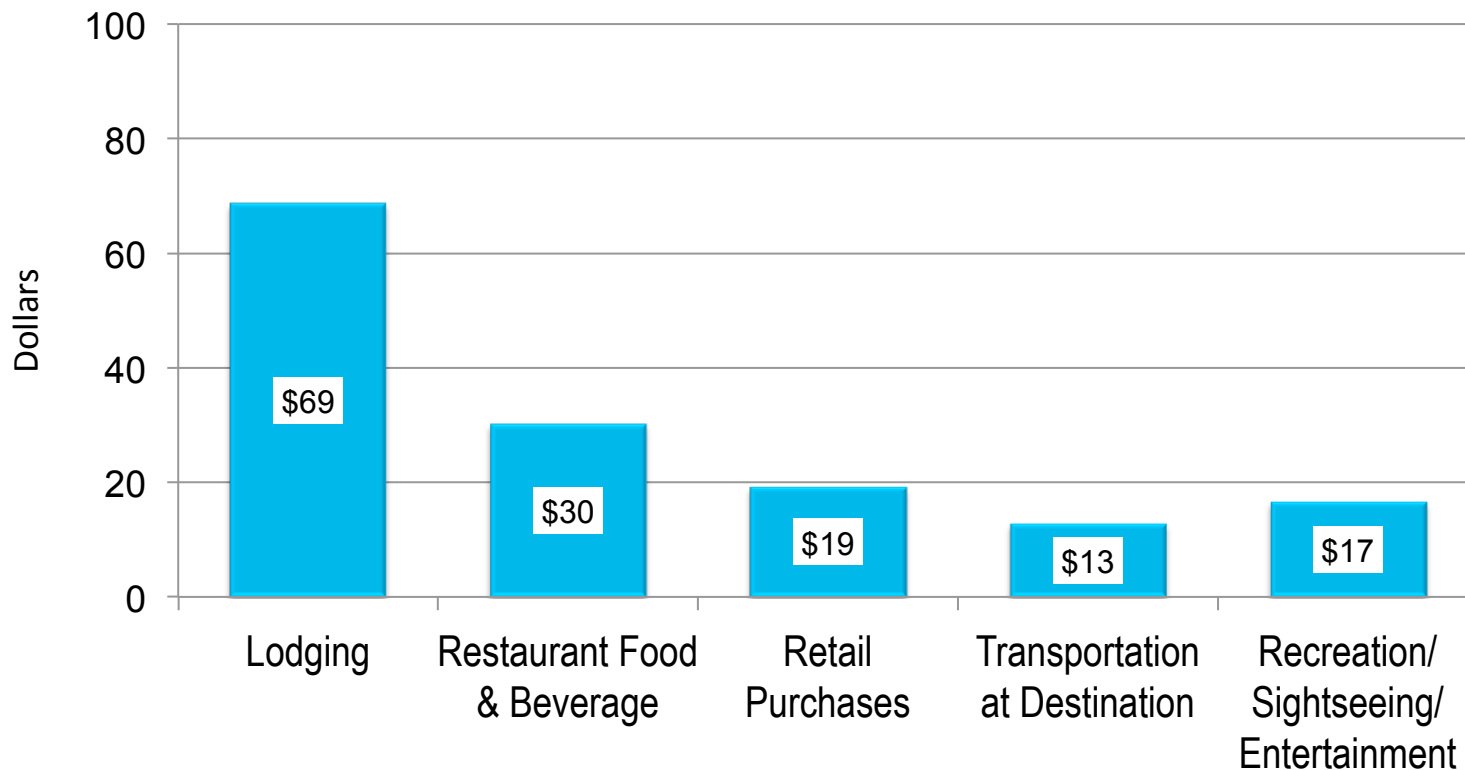


Average Per Person Expenditures on Overnight Trips — By Sector



Base: Overnight Trips to Lake Placid

Total Per Person* = \$148



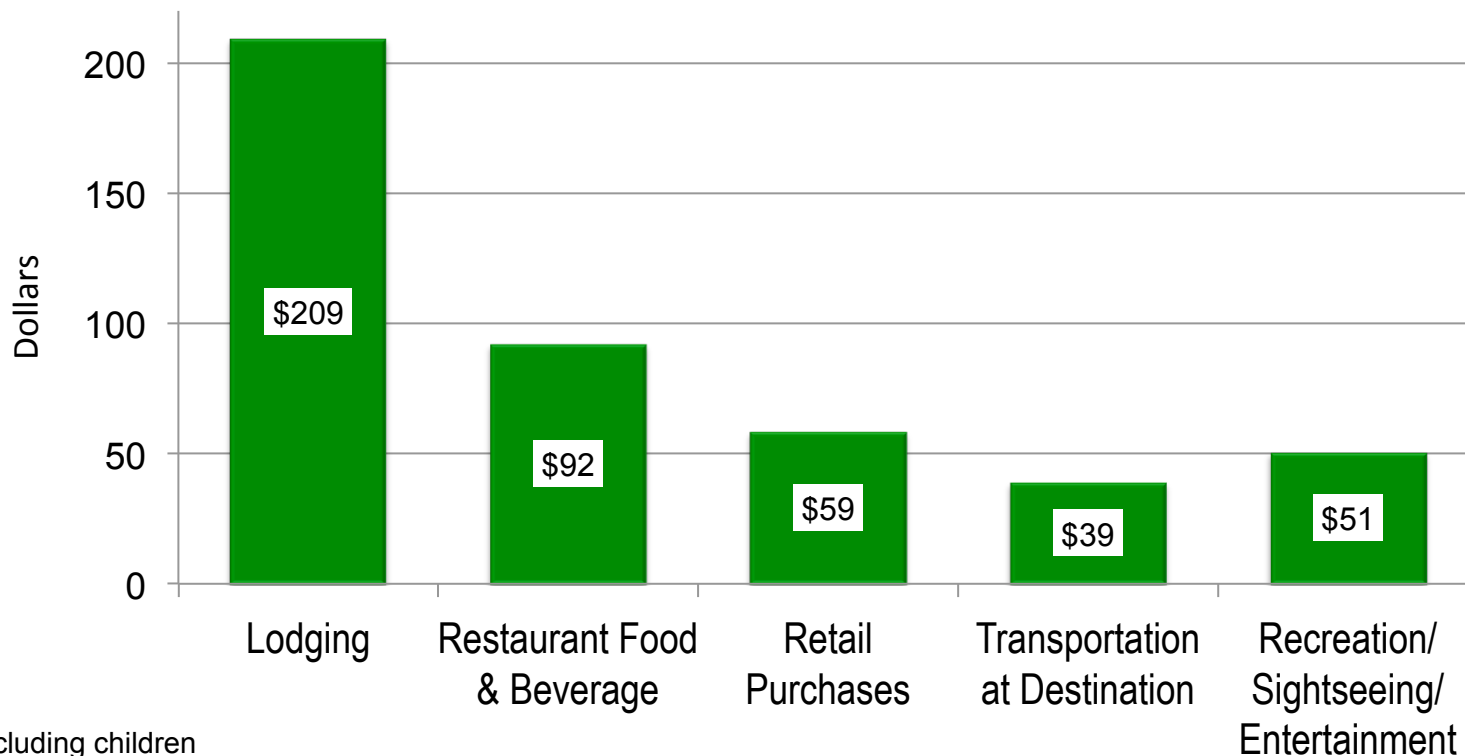
*Including children

Average Per Party Expenditures on Overnight Trips



Base: Overnight Trips to Lake Placid

Total Per Party* = \$450



*Including children



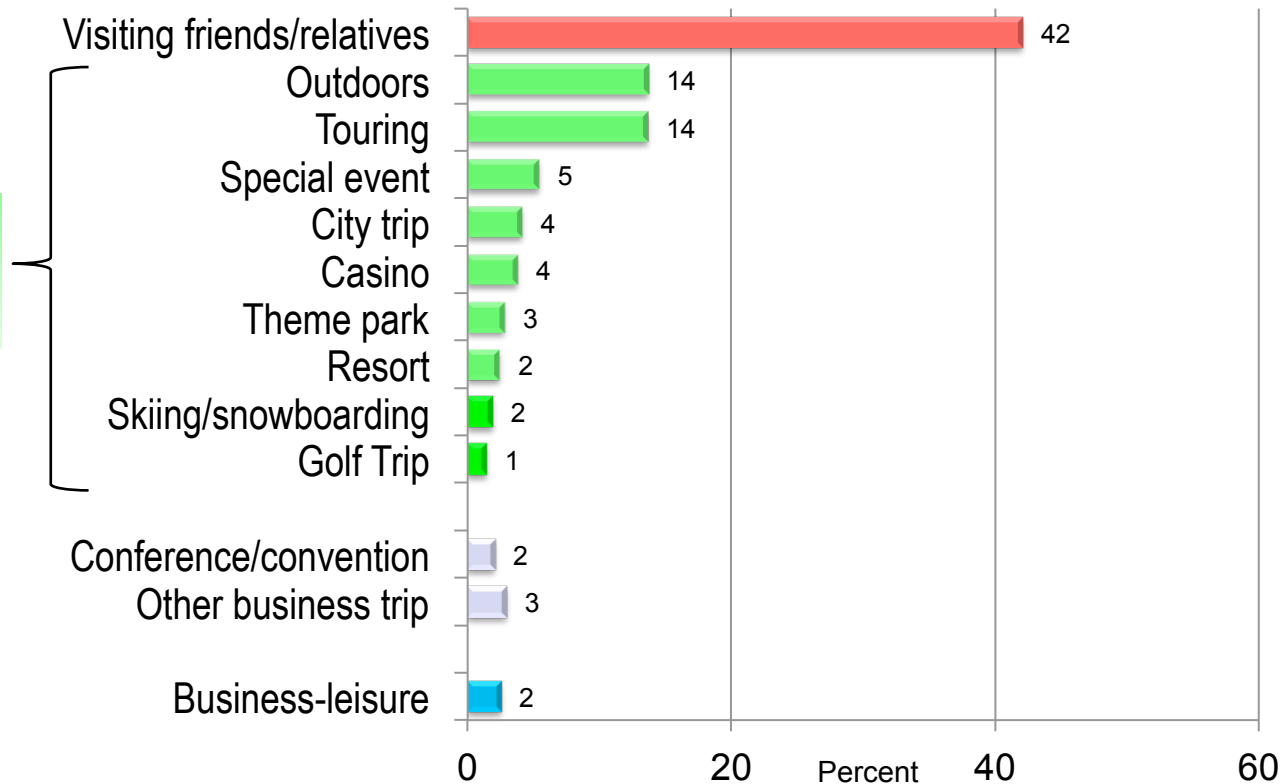
Overnight Trip Characteristics

Main Purpose of Trip



Base: Adult Overnight Trips to Adirondacks

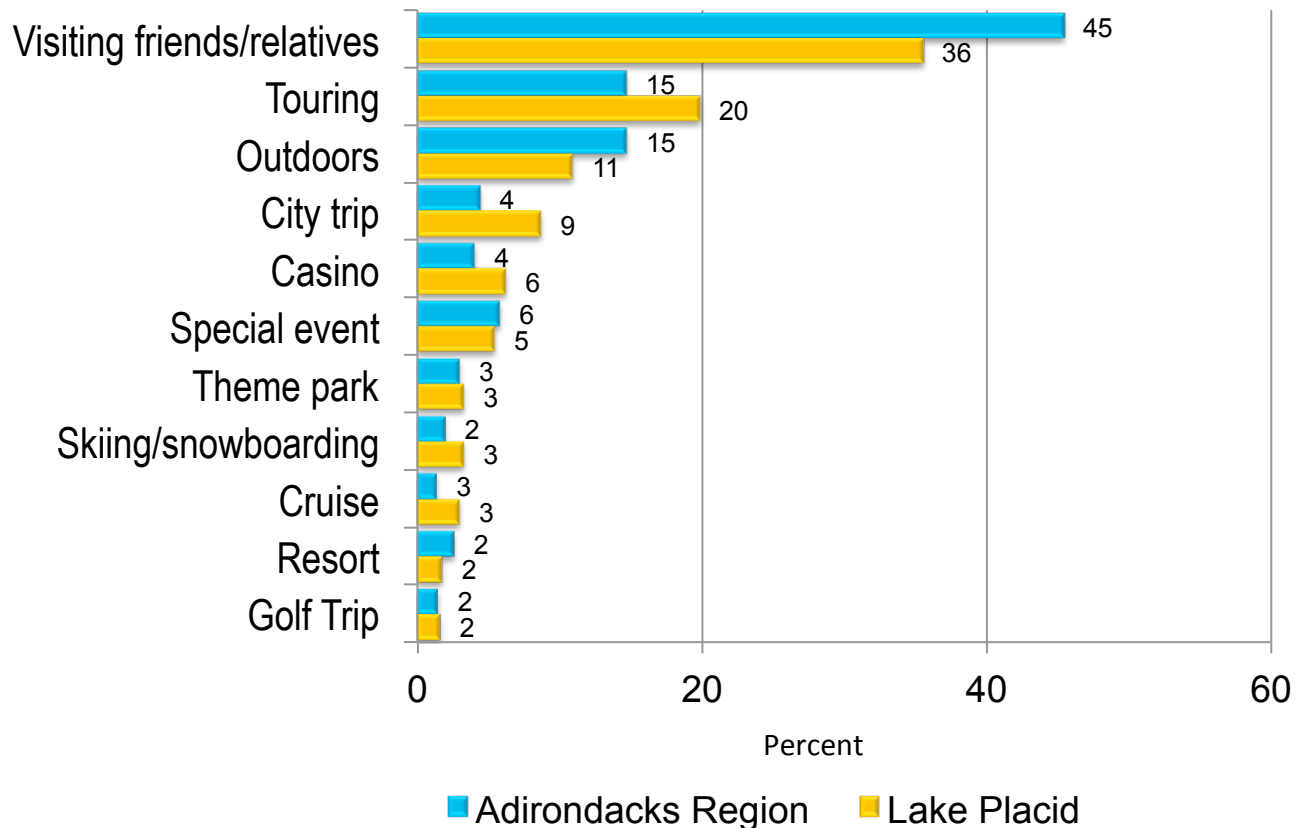
**Marketable
Trips
50%**



Main Purpose of Leisure Trip — Adirondacks Region vs. Lake Placid



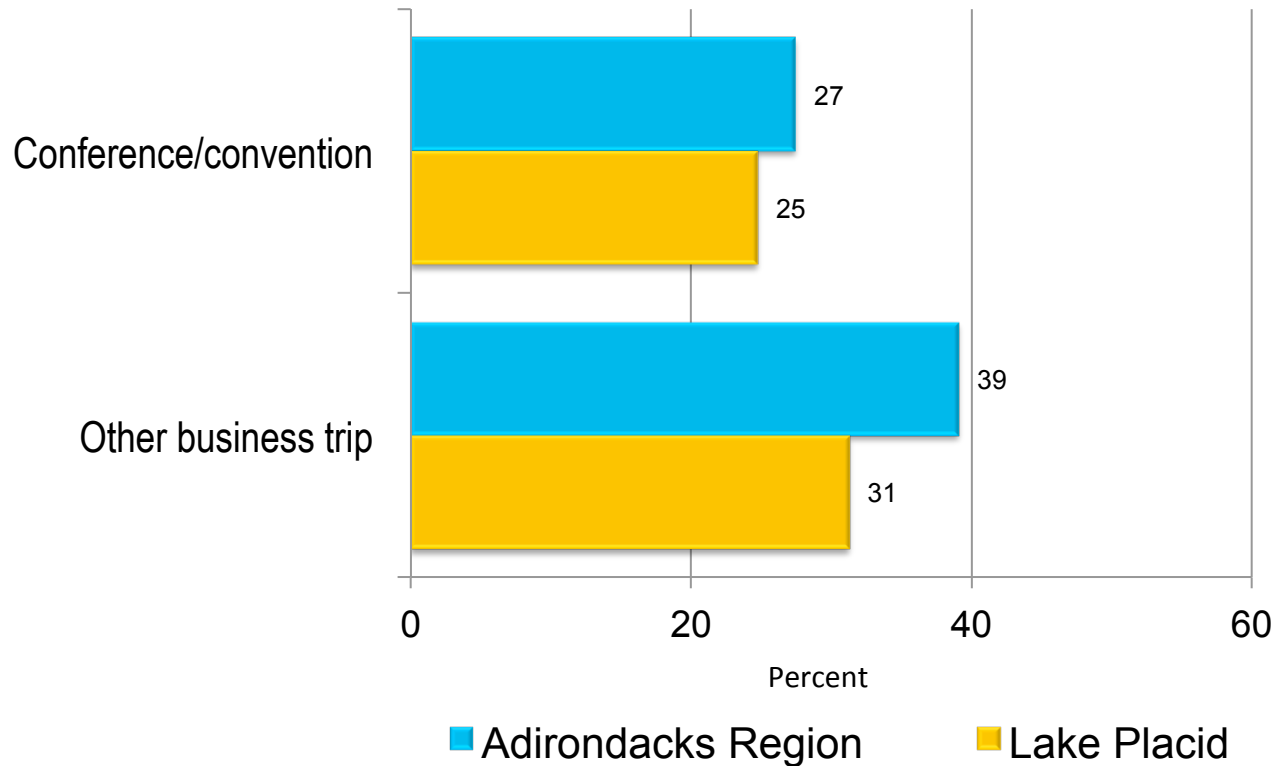
Base: Adult Overnight Leisure Trips



Main Purpose of Business Trip — Adirondacks vs. Lake Placid



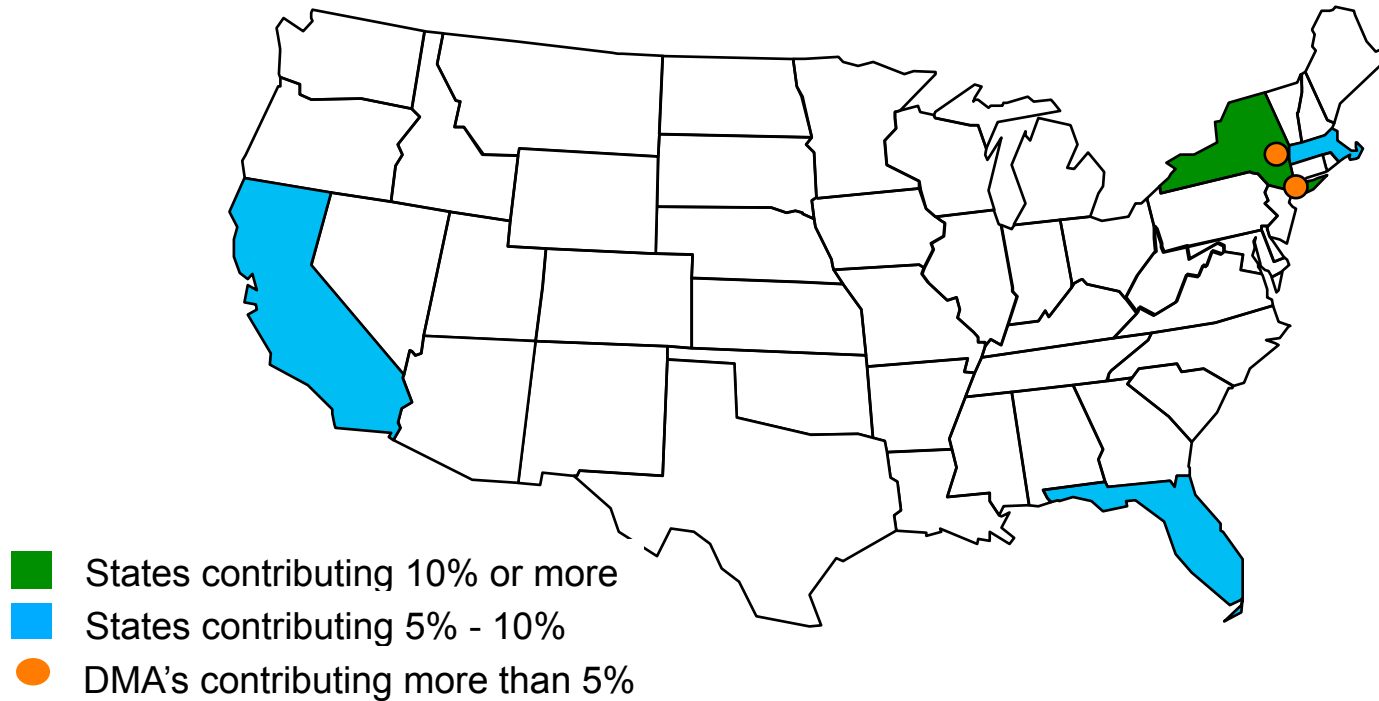
Base: Adult Overnight Business Trips



Sources of Business



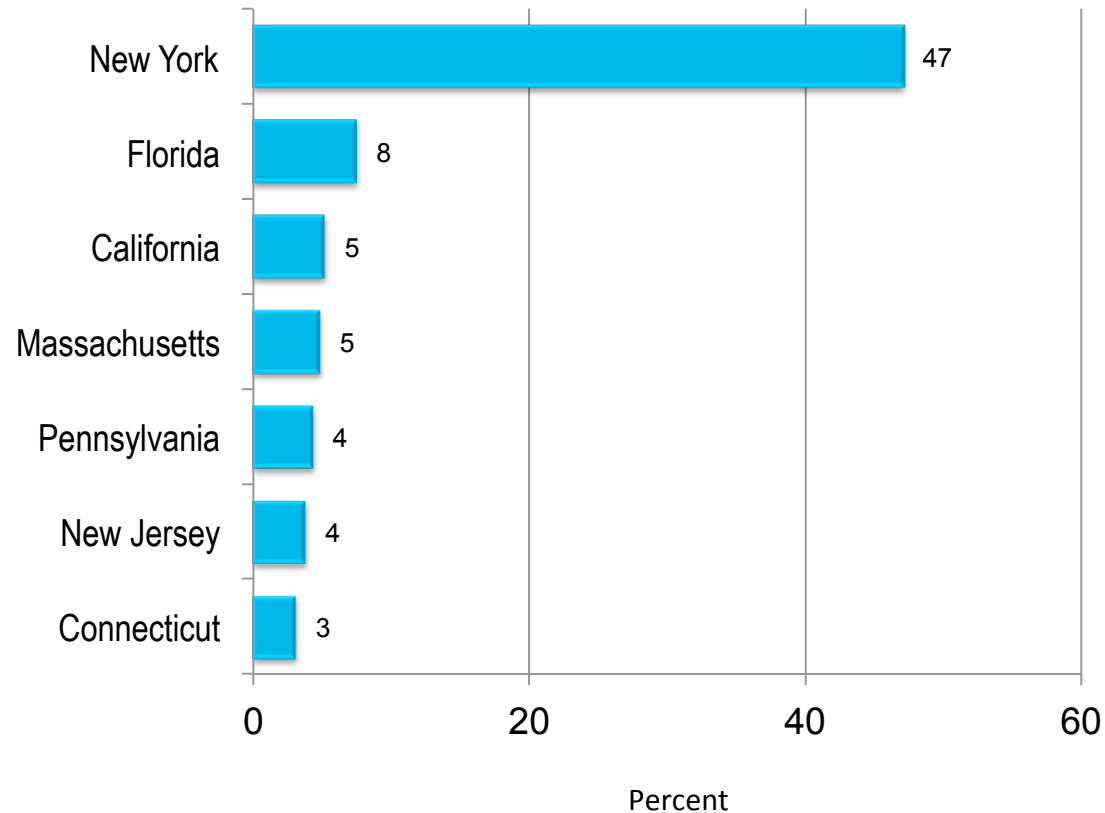
Base: Adult Overnight Trips to Adirondacks



State Origin Of Trip



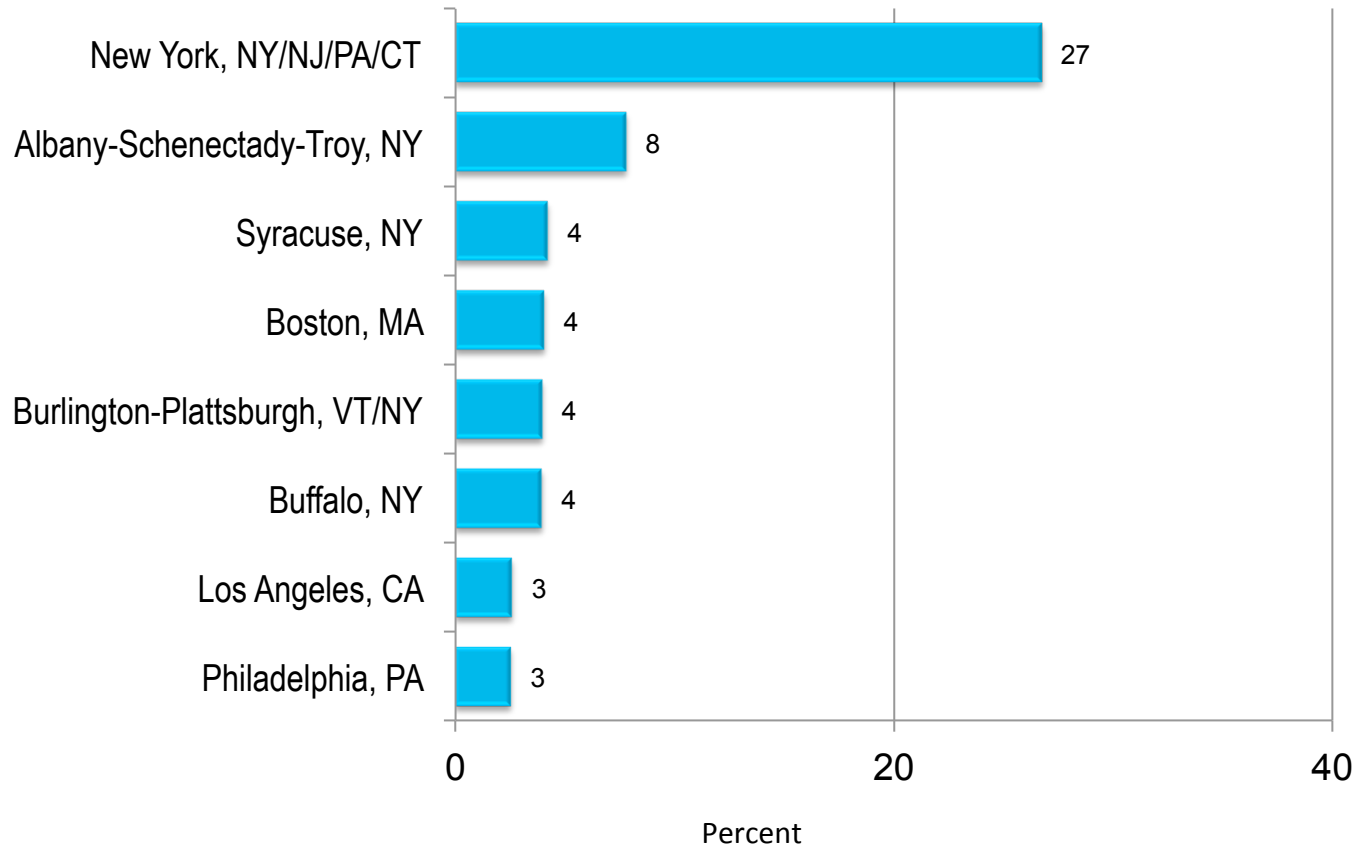
Base: Adult Overnight Trips to Adirondacks



DMA Origin Of Trip



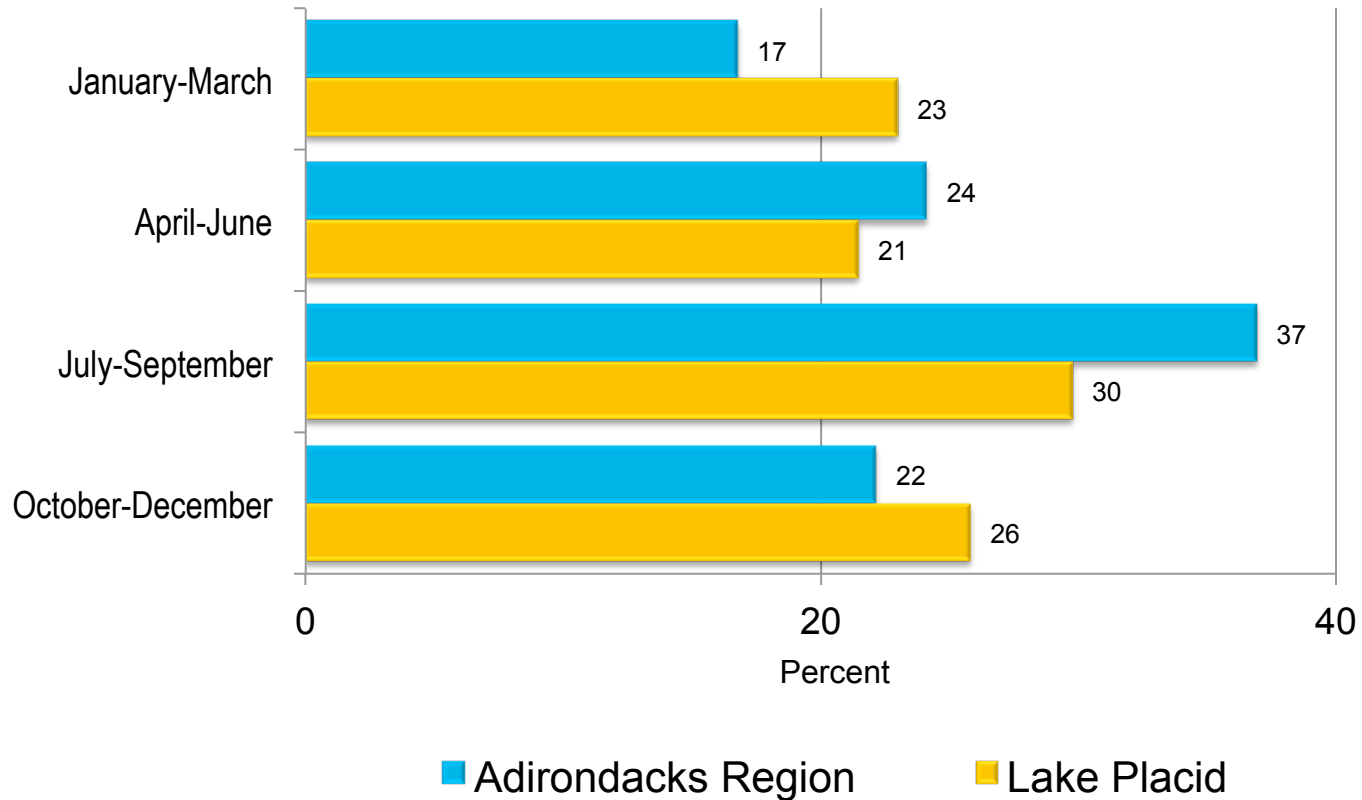
Base: Adult Overnight Trips to Adirondacks



Season of Trip



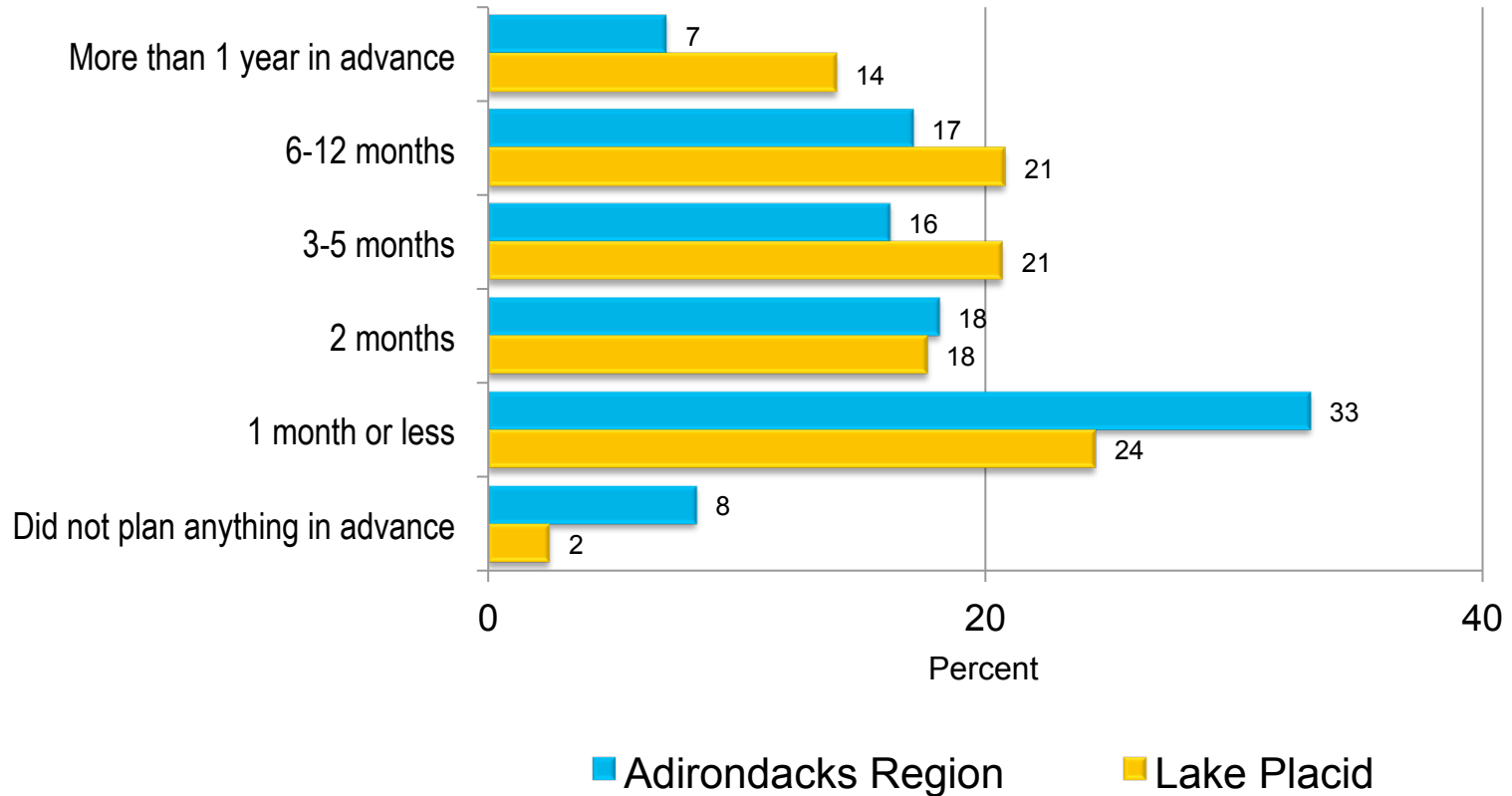
Base: Total Overnight Trips



Length of Trip Planning



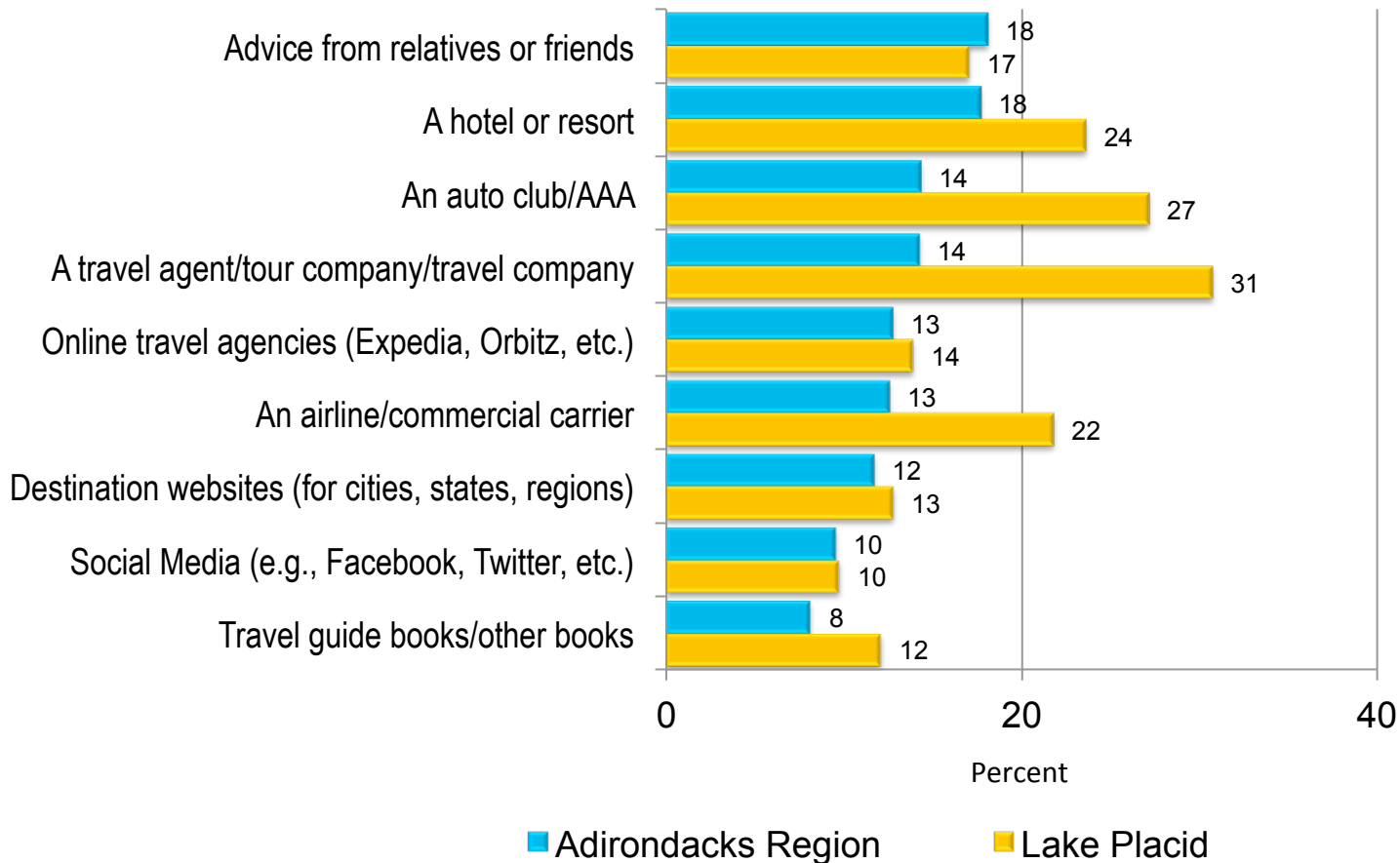
Base: Adult Overnight Trips



Method of Planning Trip



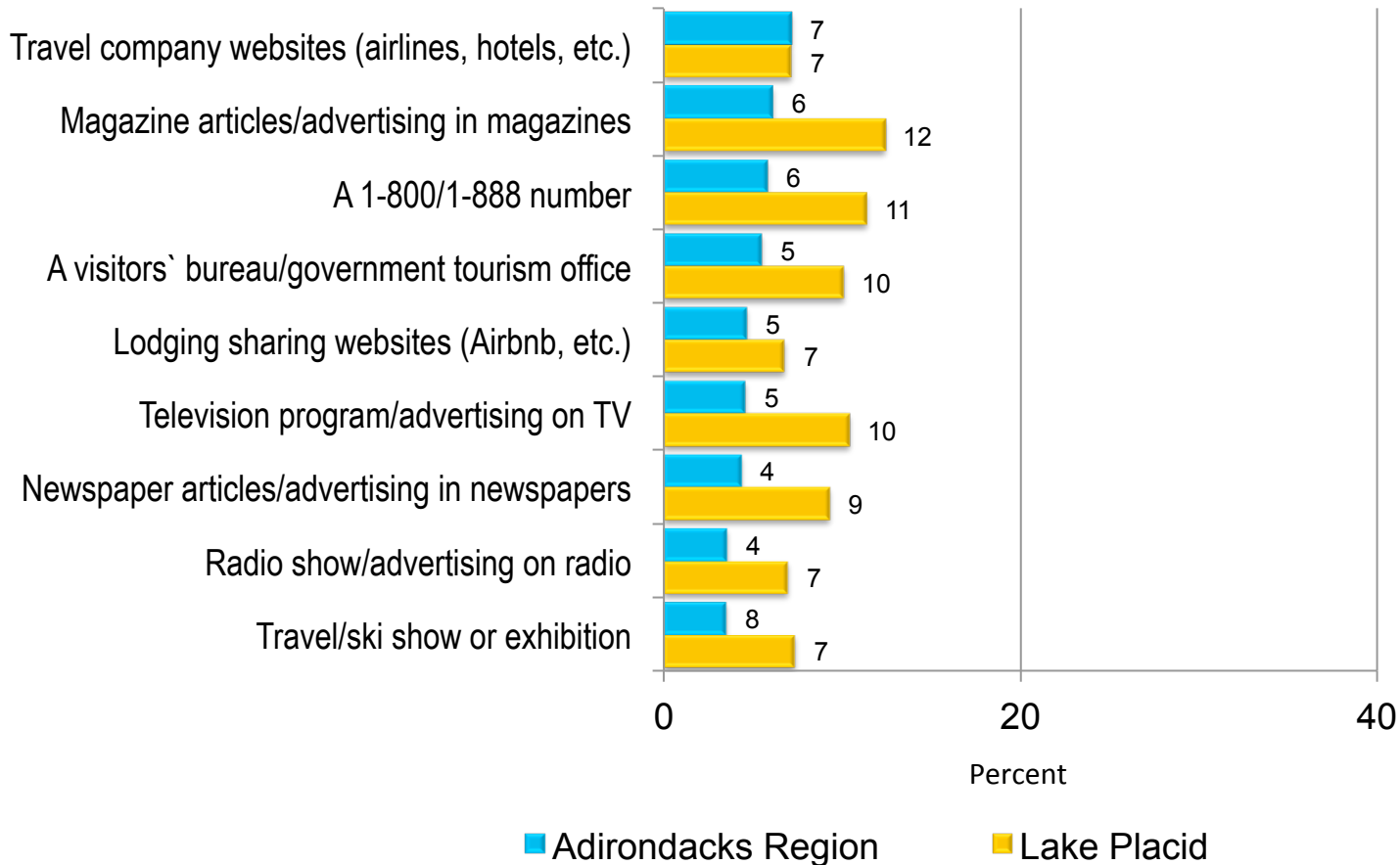
Base: Adult Overnight Trips



Method of Planning Trip (Cont'd)



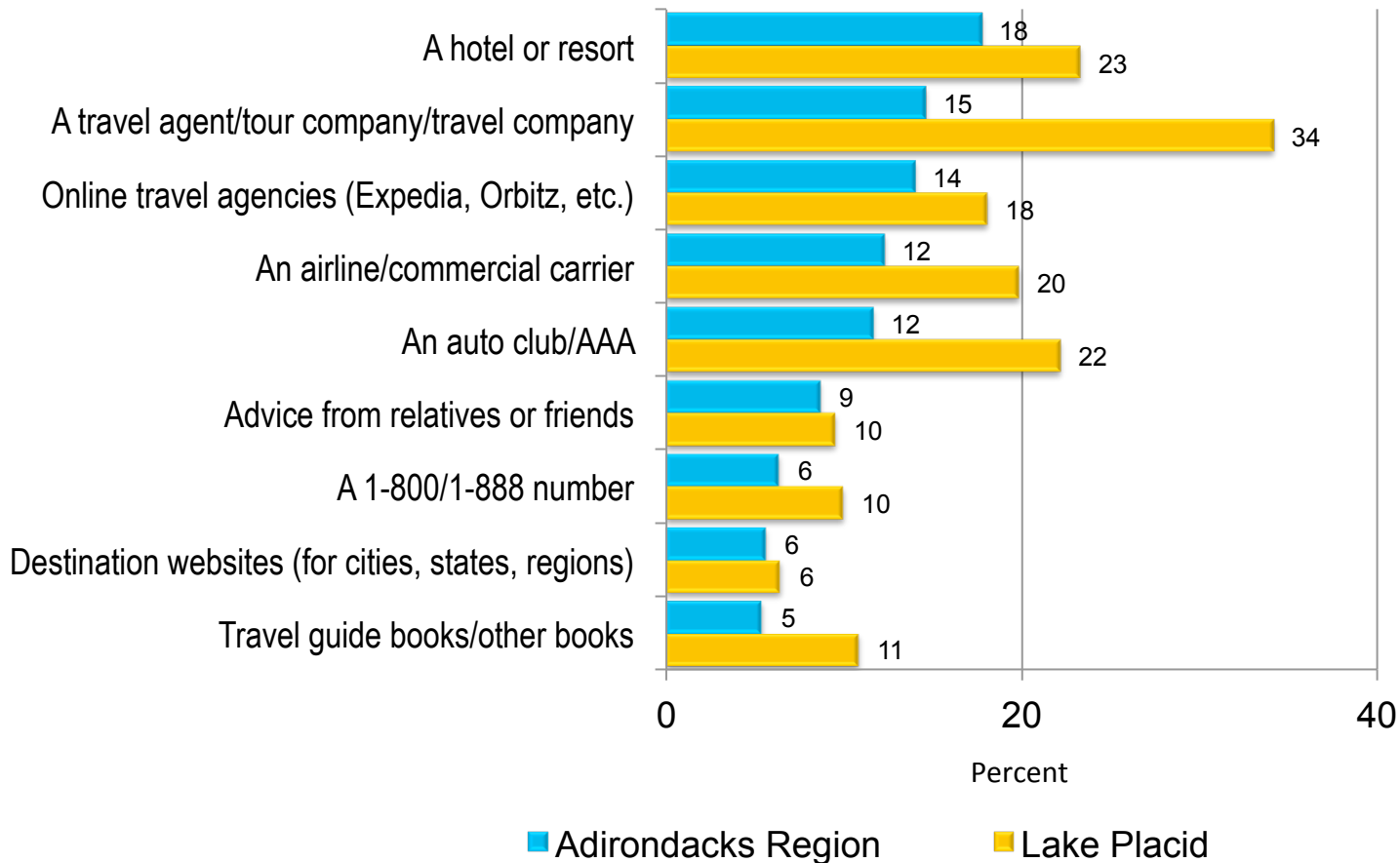
Base: Adult Overnight Trips



Method of Booking Trip



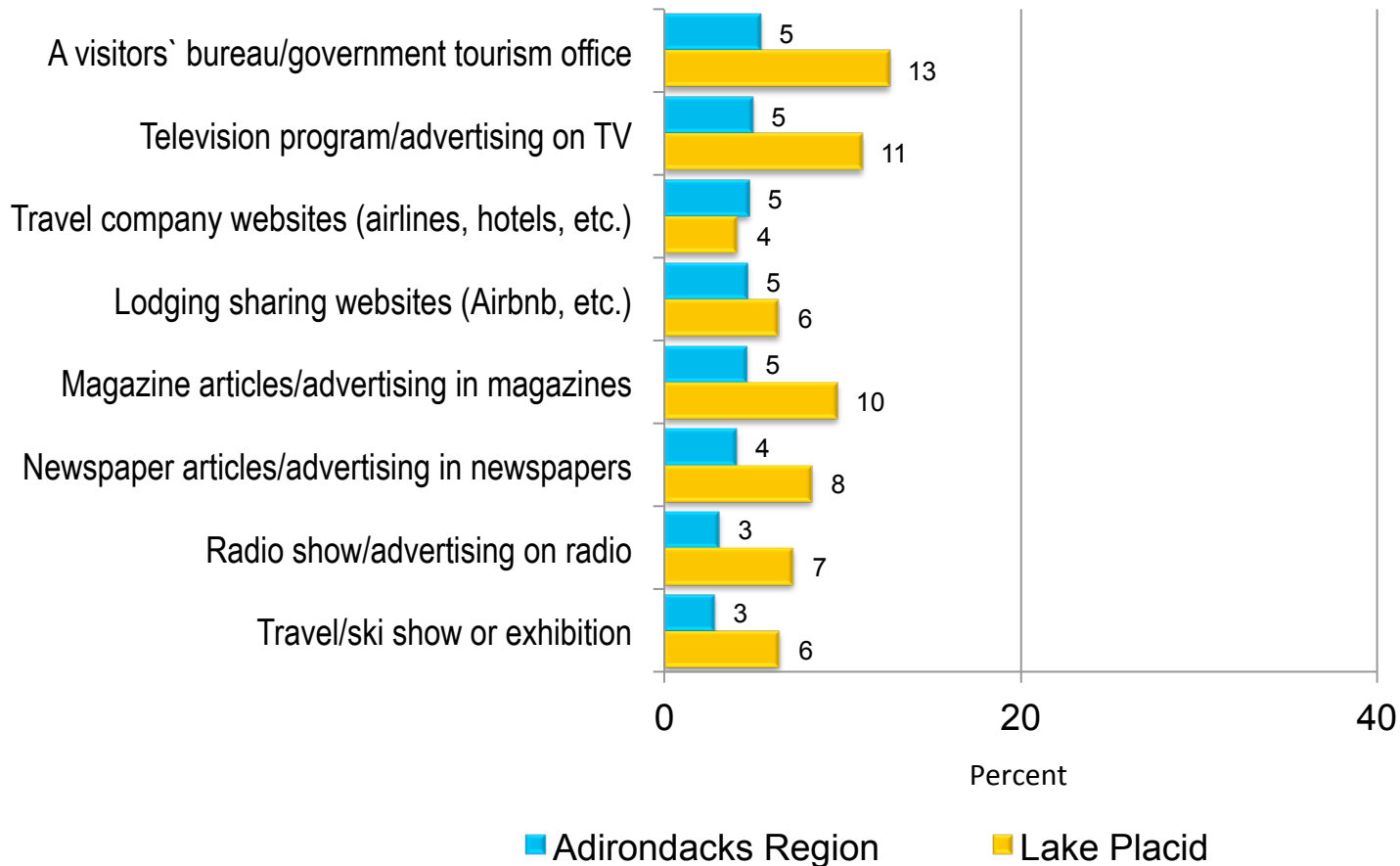
Base: Adult Overnight Trips



Method of Booking Trip (Cont'd)



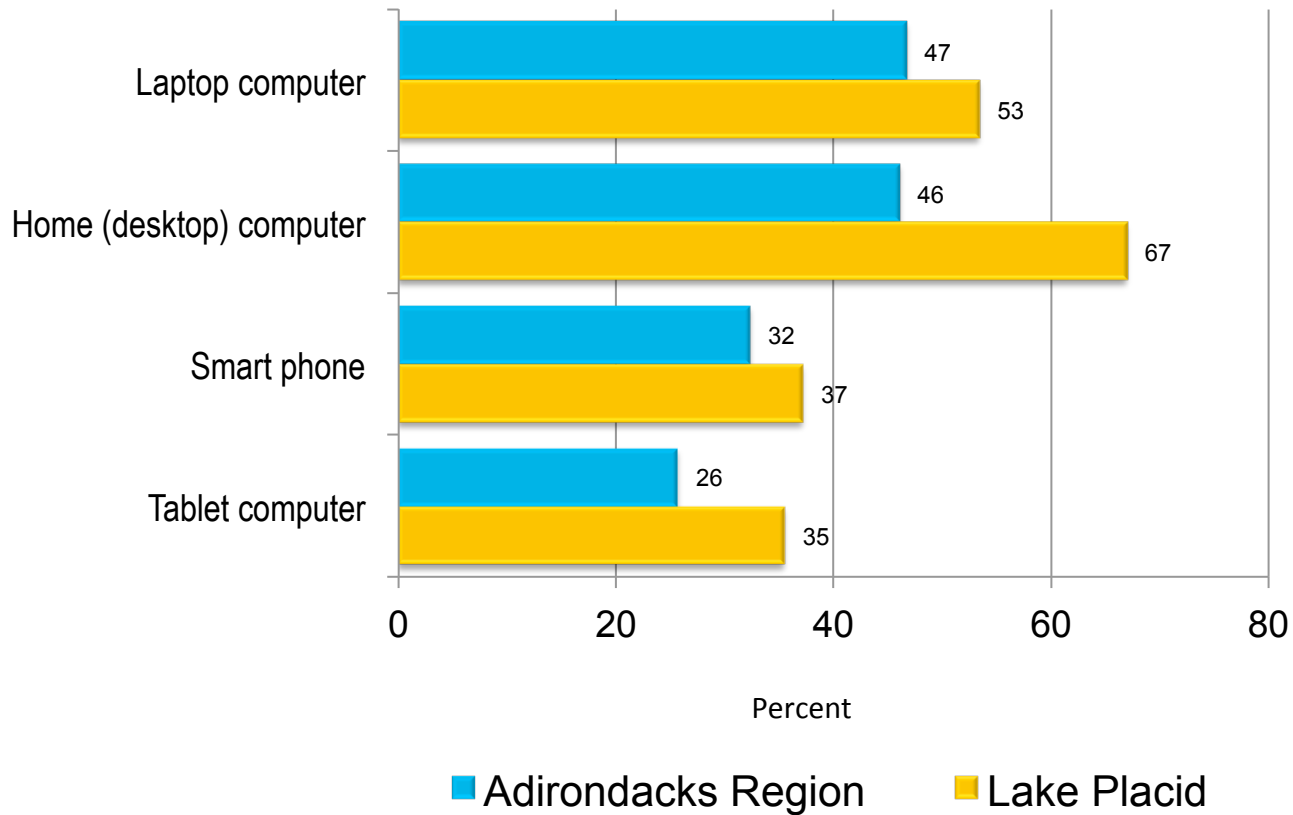
Base: Adult Overnight Trips



Devices Used for Trip Planning



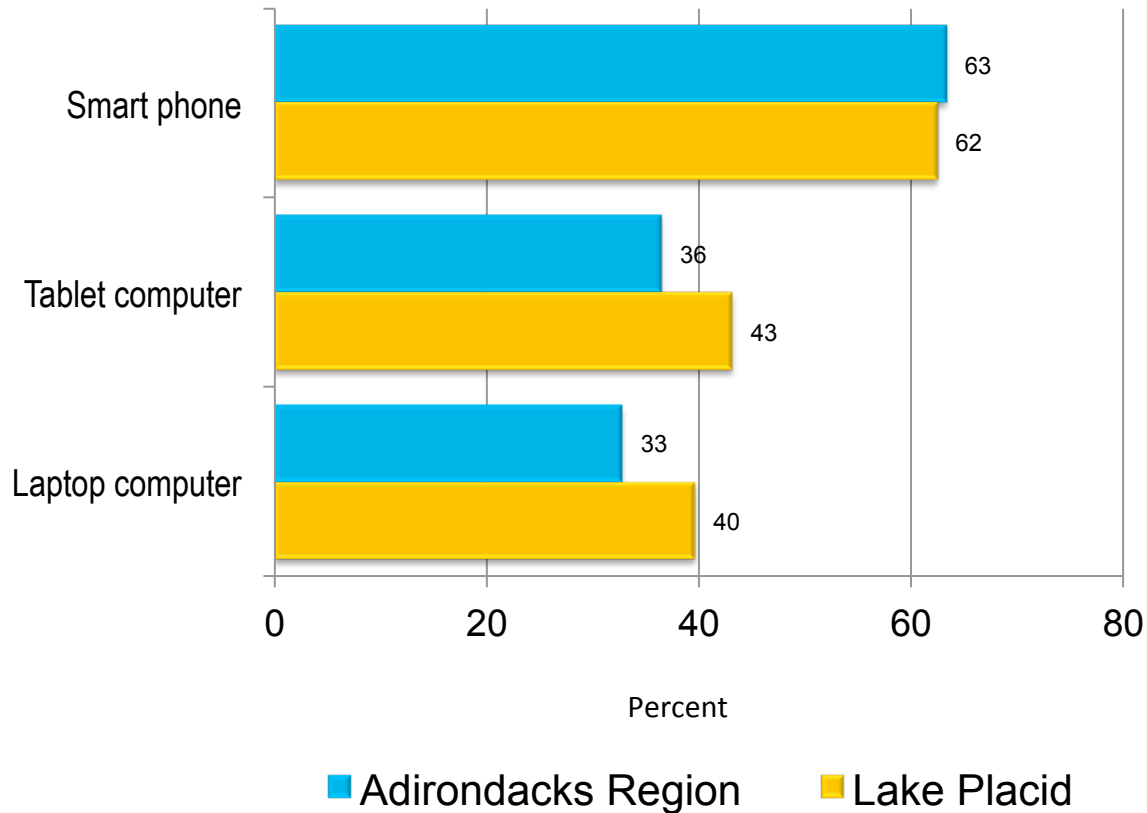
Base: Adult Overnight Trips



Devices Used During Trip



Base: Adult Overnight Trips



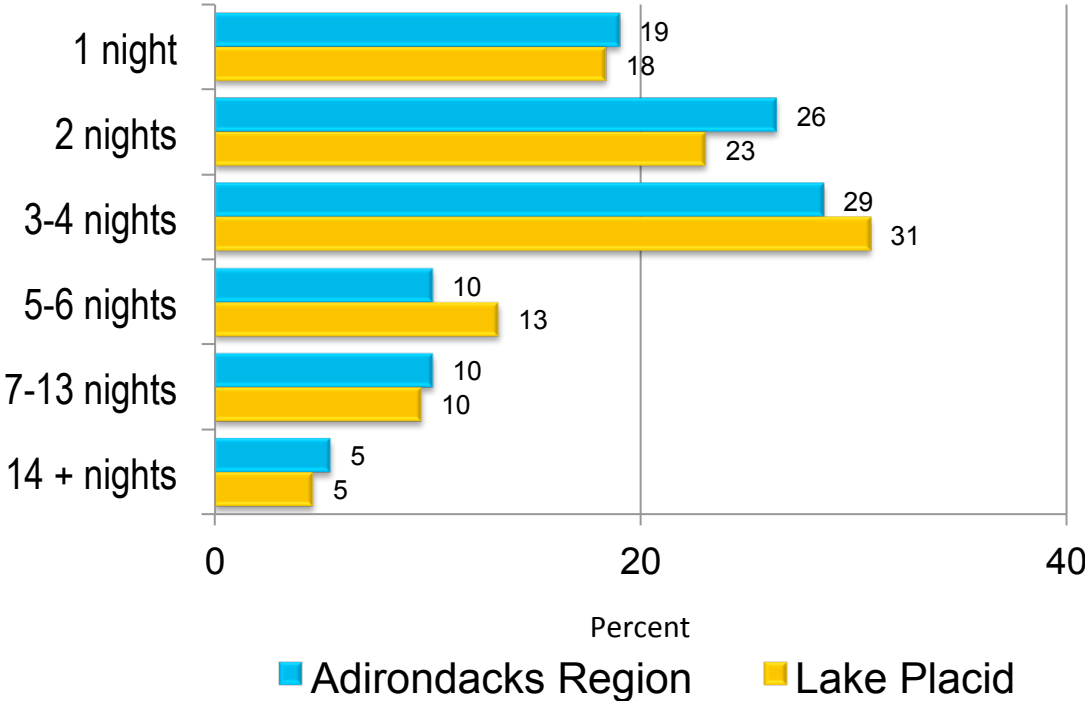
Total Nights Away on Trip



Base: Adult Overnight Trips

**Average
Adirondacks Region
= 4.2 nights**

**Average
Lake Place
= 4.1 nights**

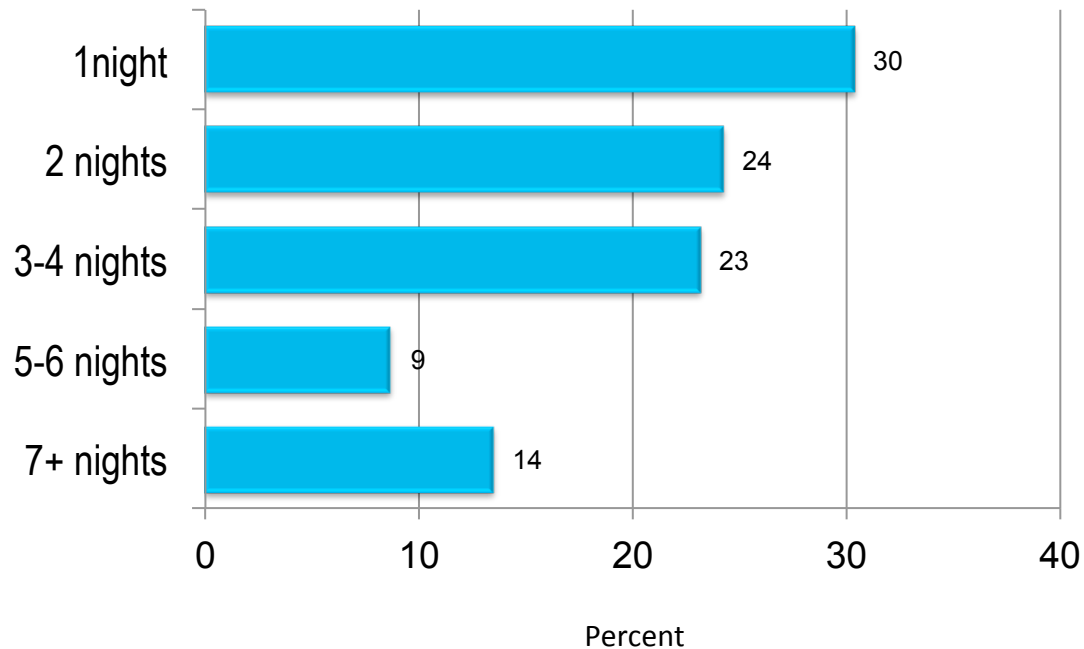


Number of Nights Spent in Adirondacks



Base: Adult Overnight Trips with 1+ Nights Spent in the Adirondacks Region

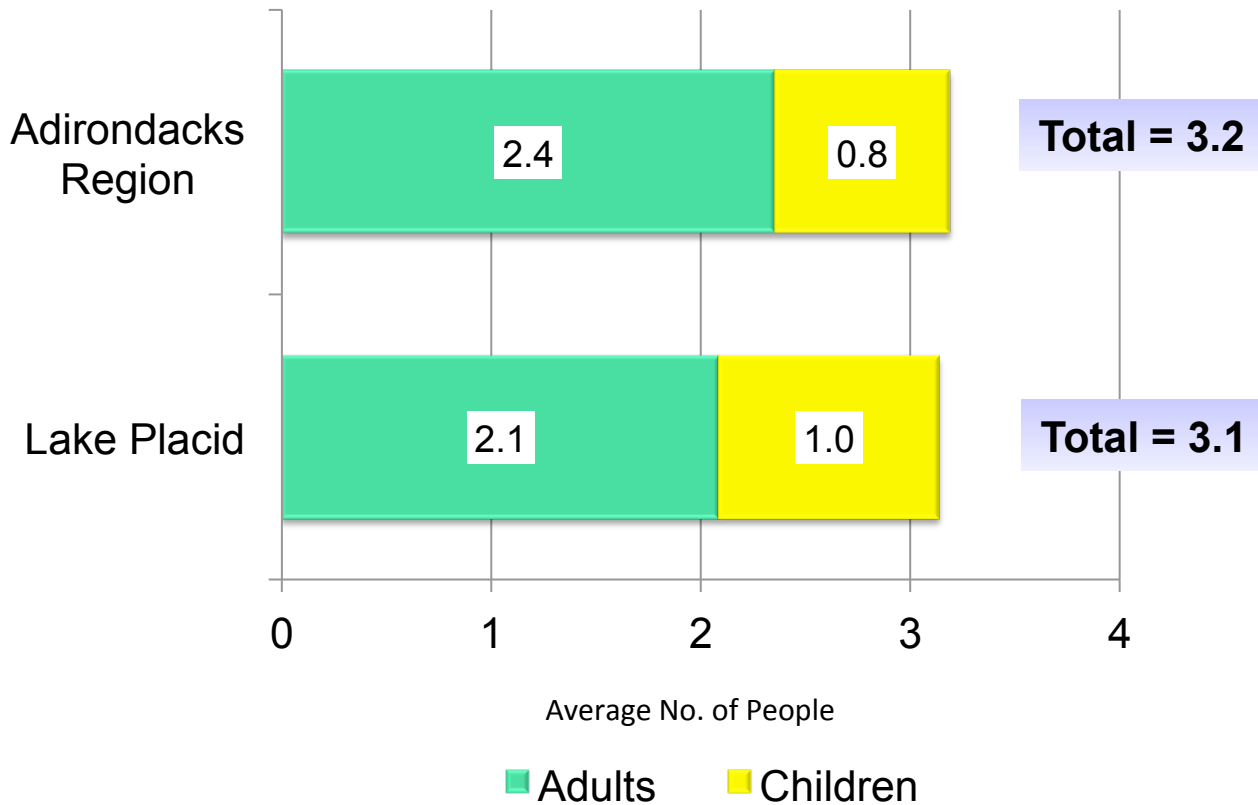
Average Nights Spent in Adirondacks = 3.7 nights



Size of Travel Party



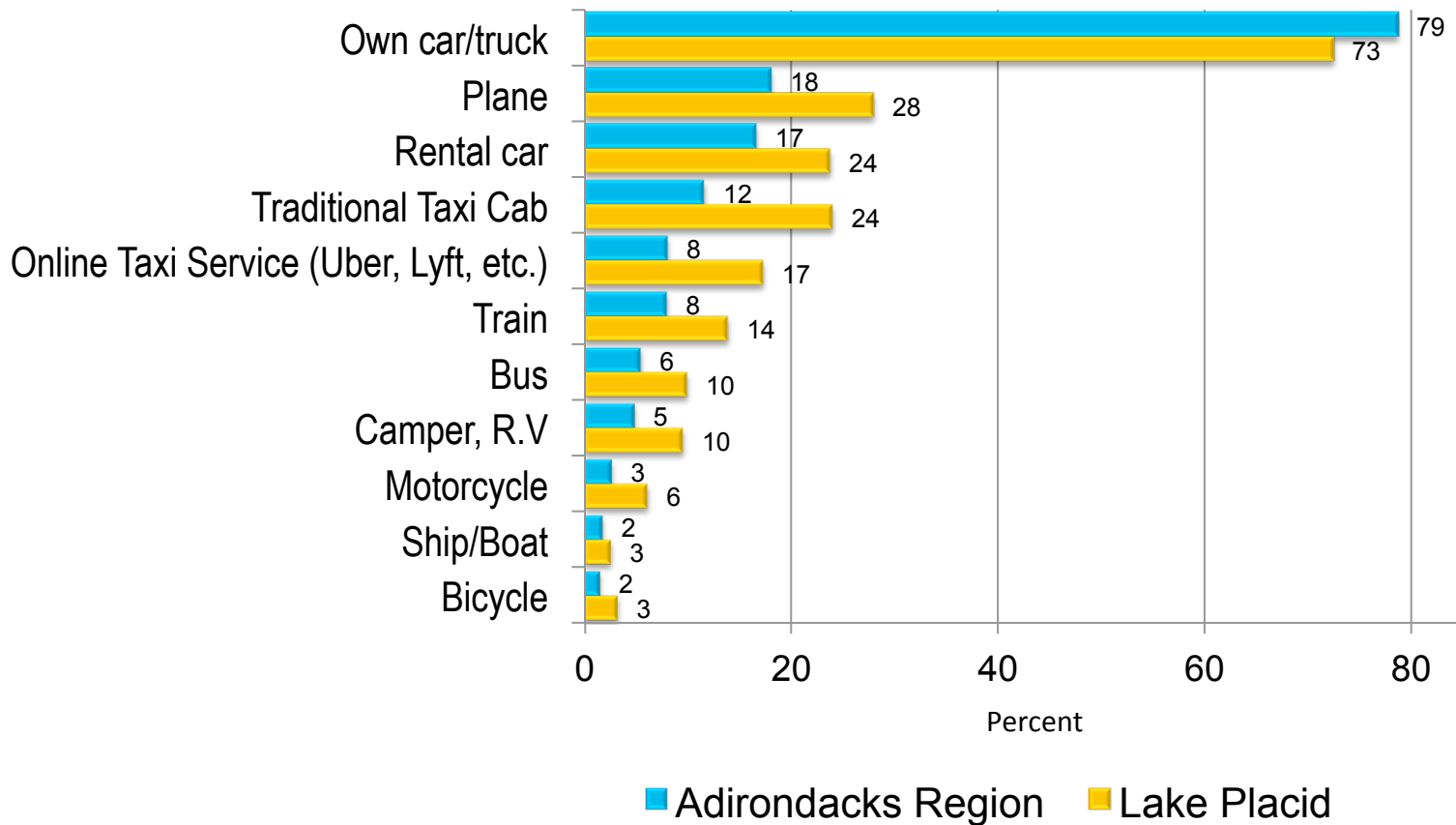
Base: Adult Overnight Trips



Transportation



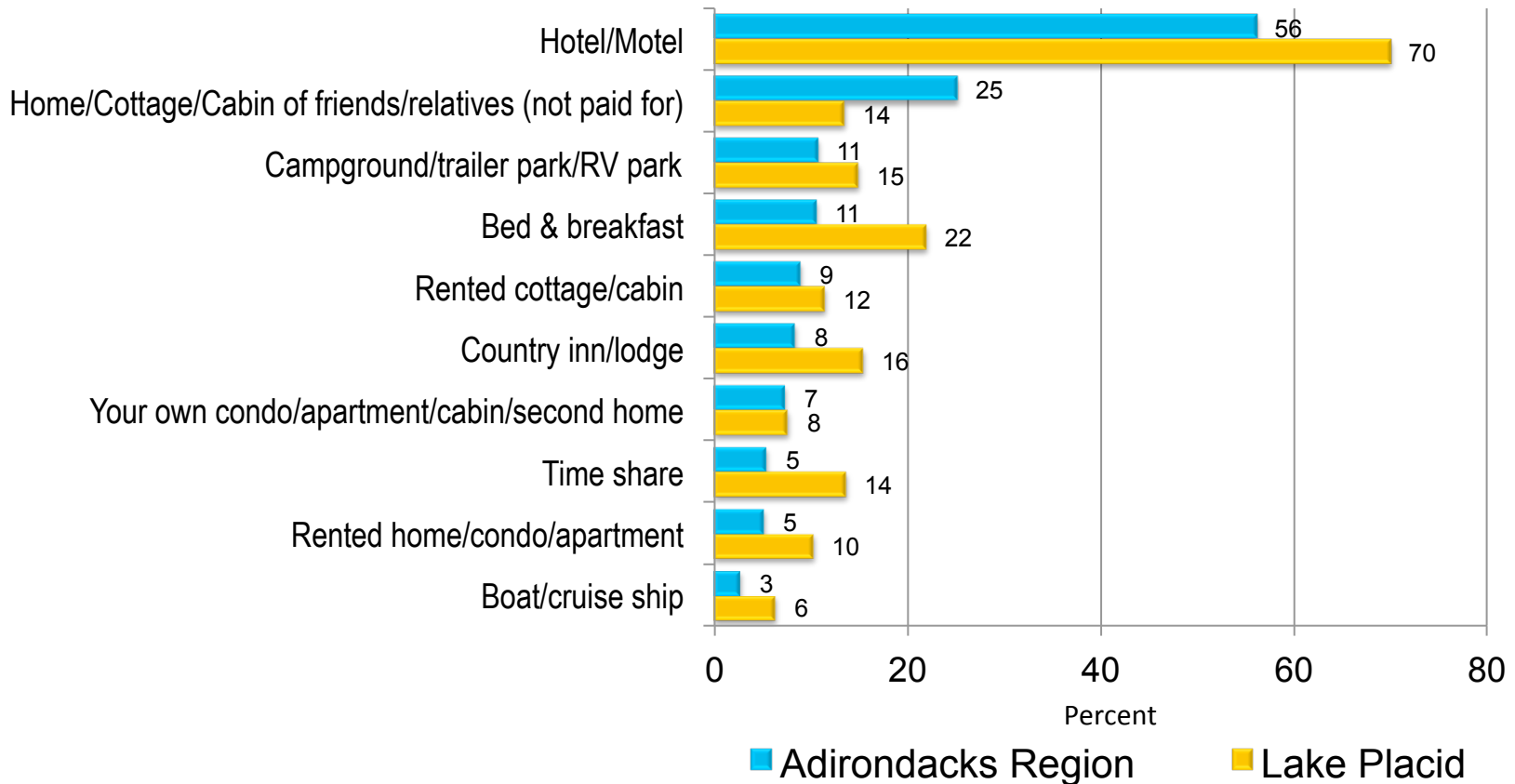
Base: Adult Overnight Trips



Accommodations



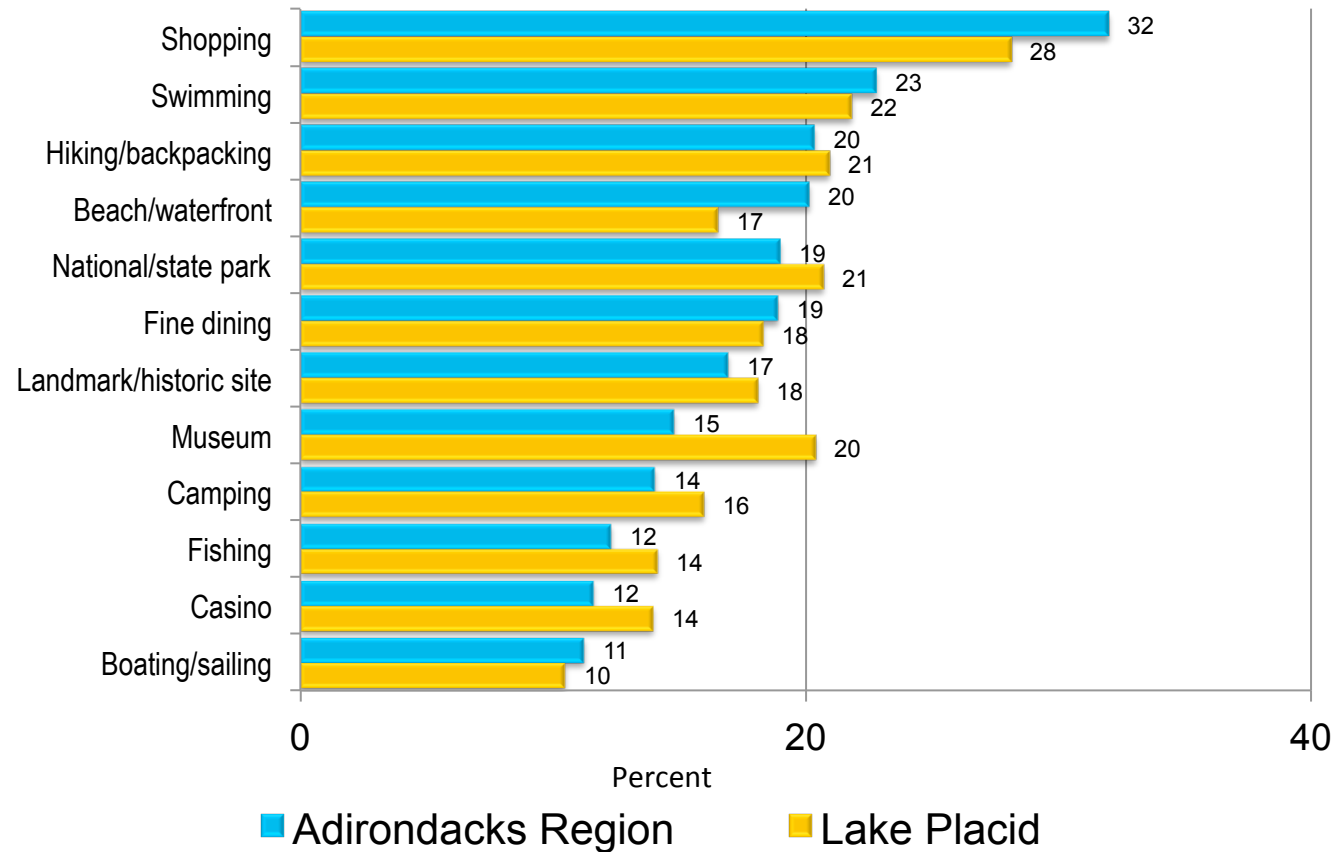
Base: Adult Overnight Trips



Activities and Experiences



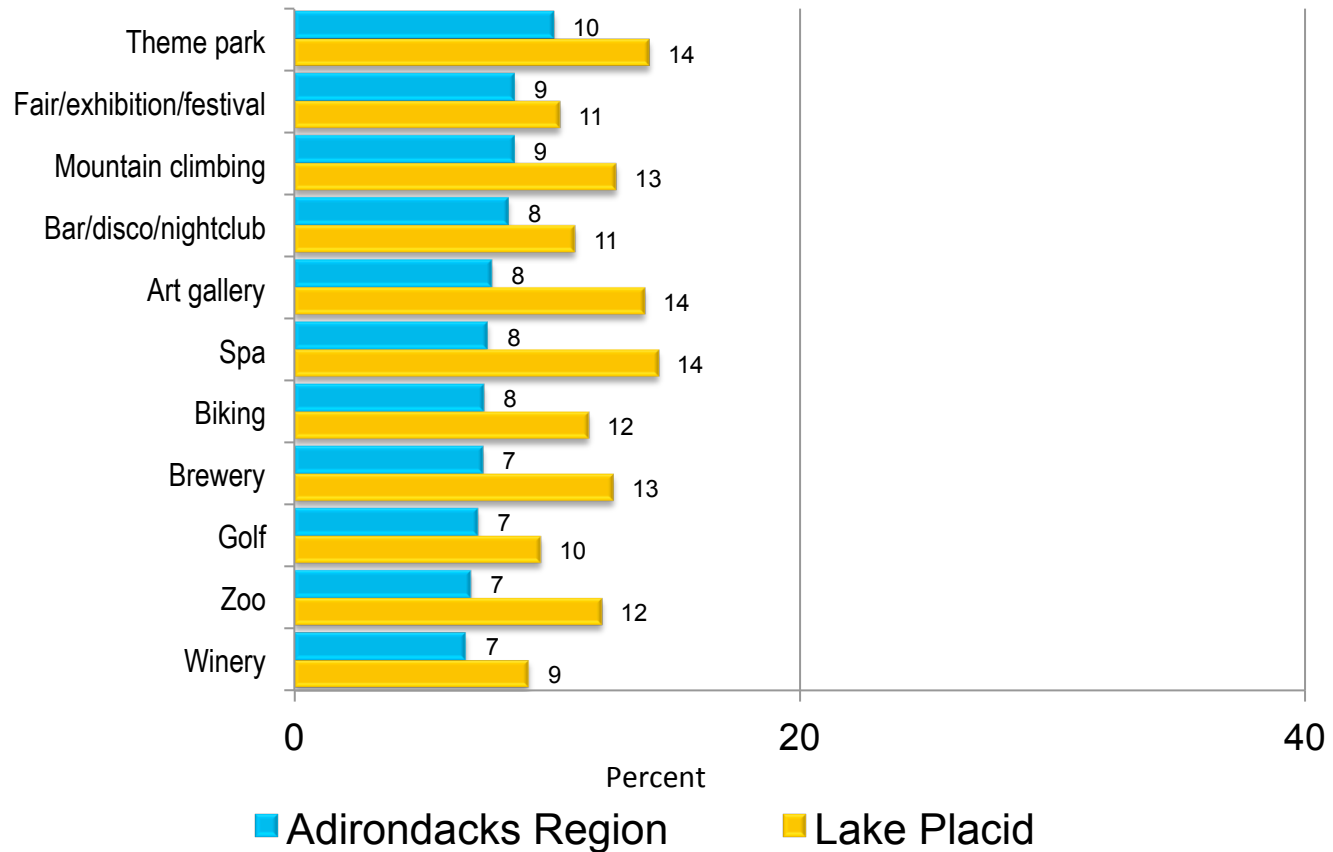
Base: Adult Overnight Trips



Activities and Experiences (Cont'd)



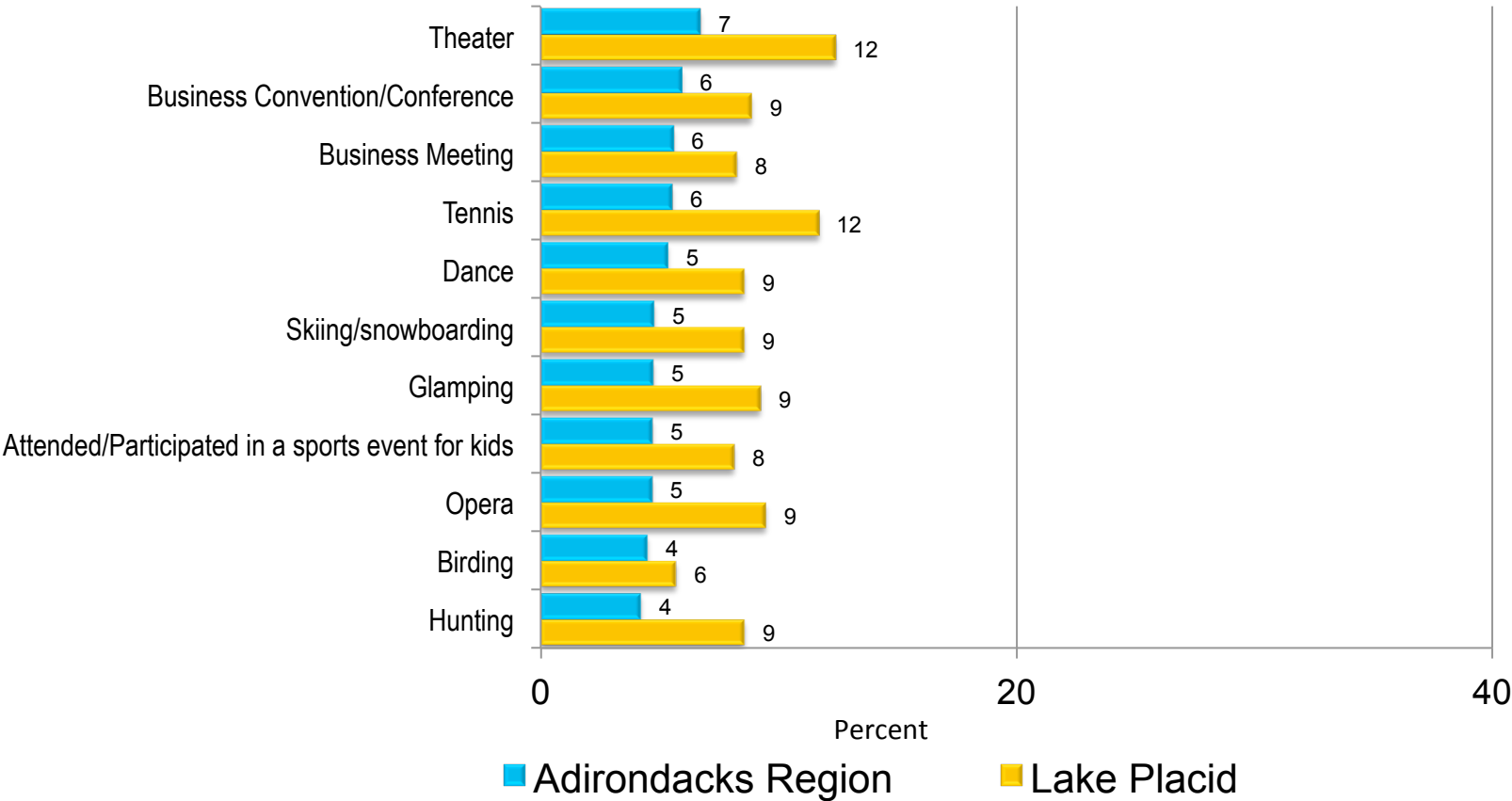
Base: Adult Overnight Trips



Activities and Experiences (Cont'd)



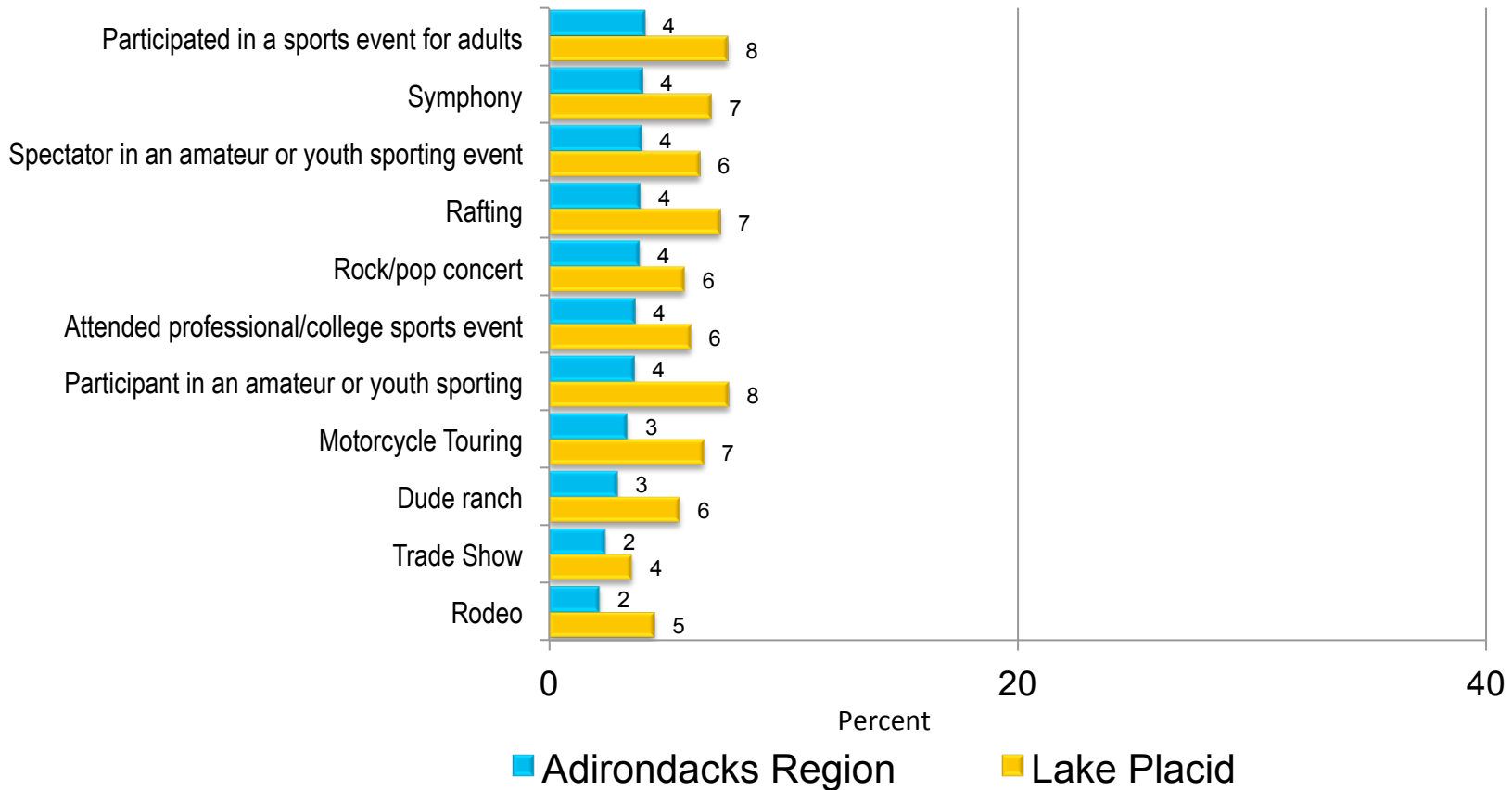
Base: Adult Overnight Trips



Activities and Experiences (Cont'd)



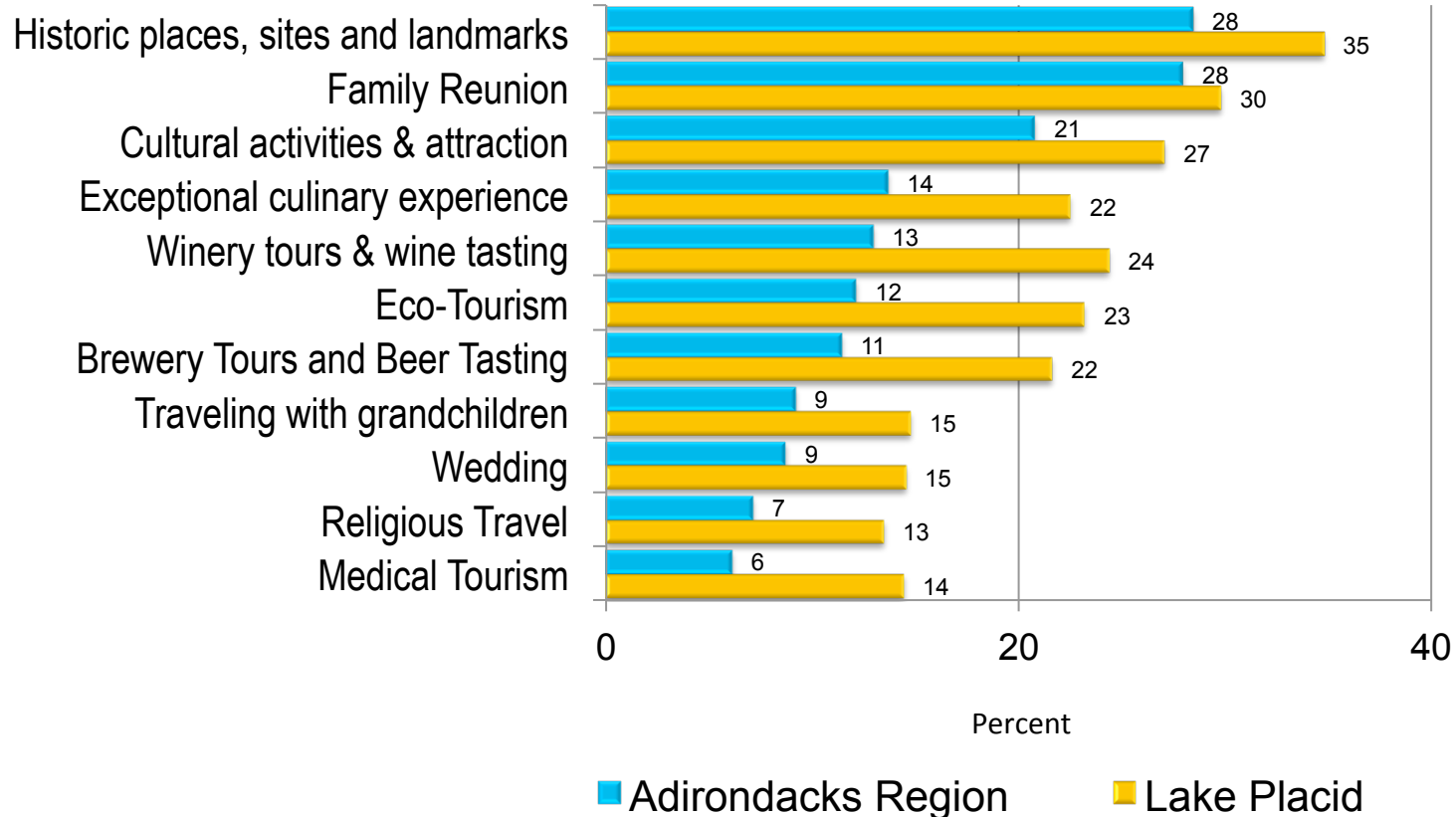
Base: Adult Overnight Trips



Activities of Special Interest



Base: Adult Overnight Trips

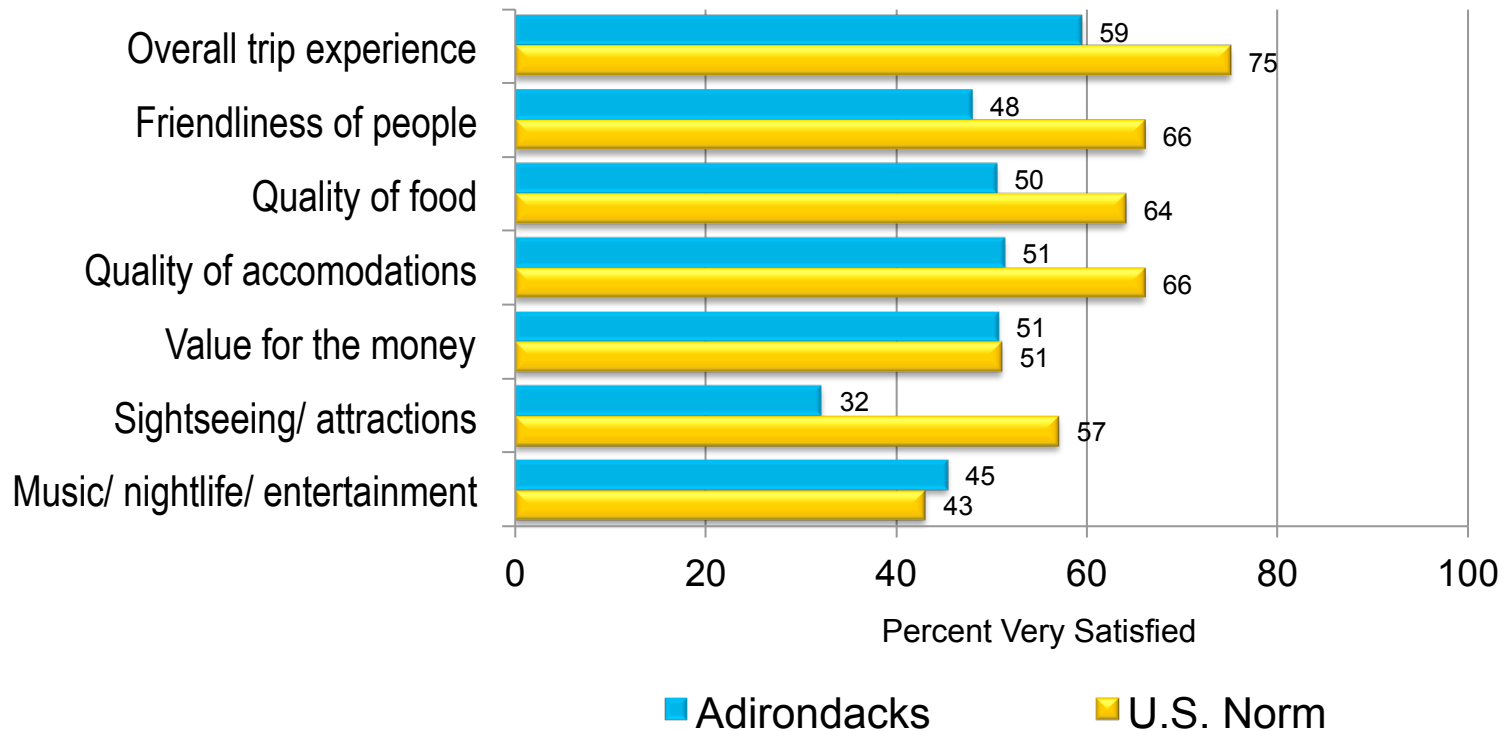


Satisfaction with Adirondacks Trip

% Very Satisfied



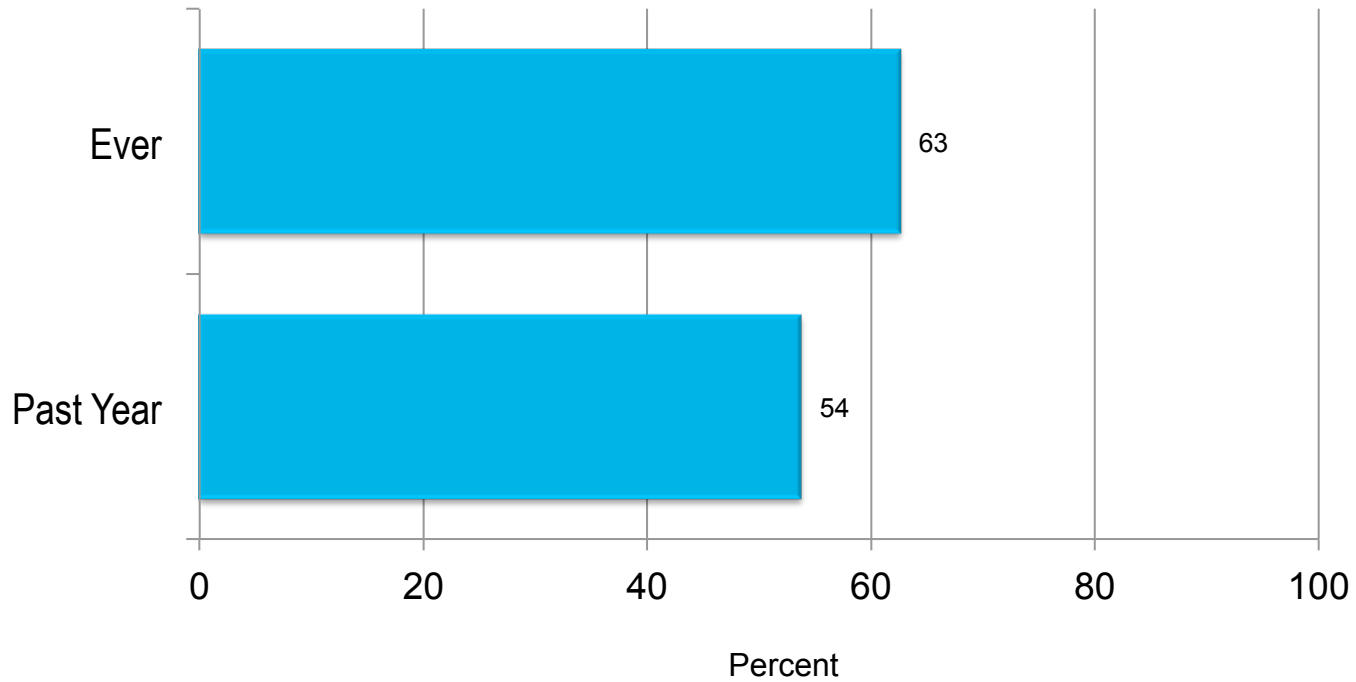
Base: Adult Overnight Trips



Past Visitation to Adirondacks



Base: Adult Overnight Trips to Adirondacks



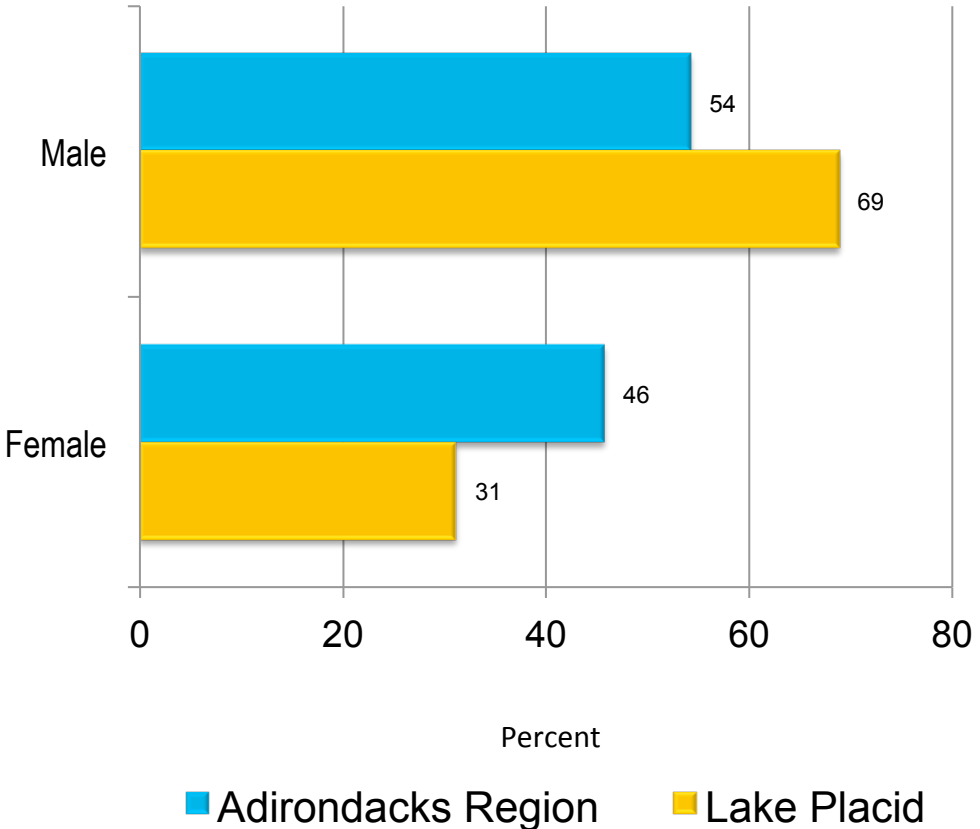


Demographic Profile of Overnight Visitors

Gender



Base: Adult Overnight Trips



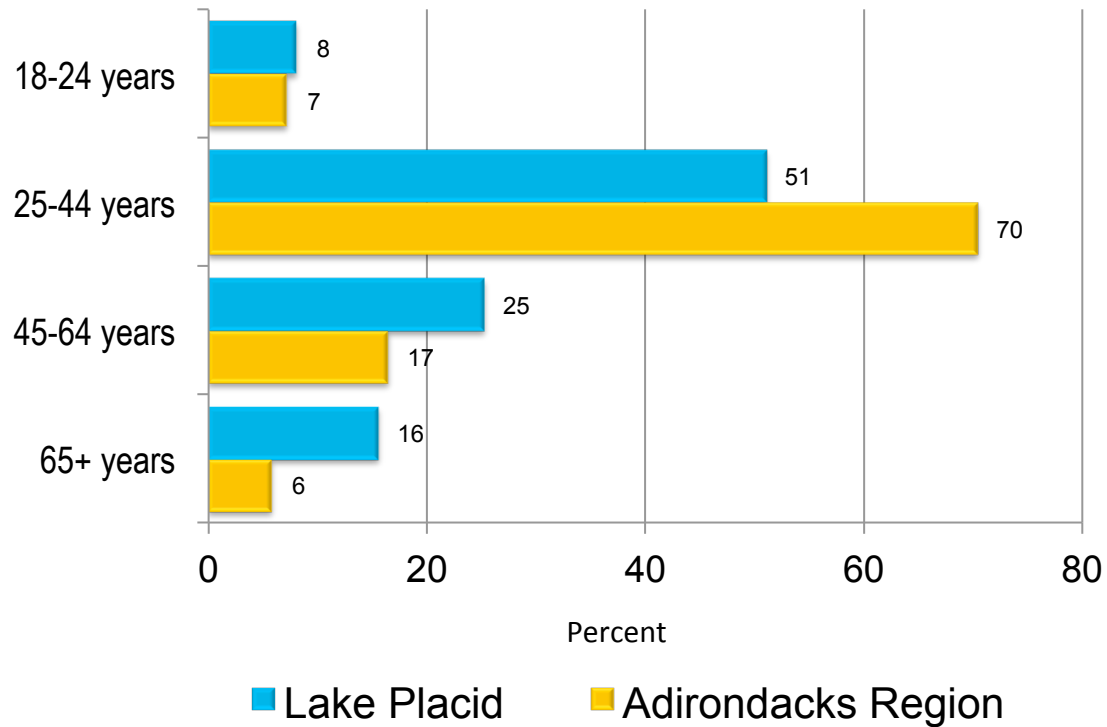
Age



Base: Adult Overnight Trips

Average Adirondacks Region = 44.2

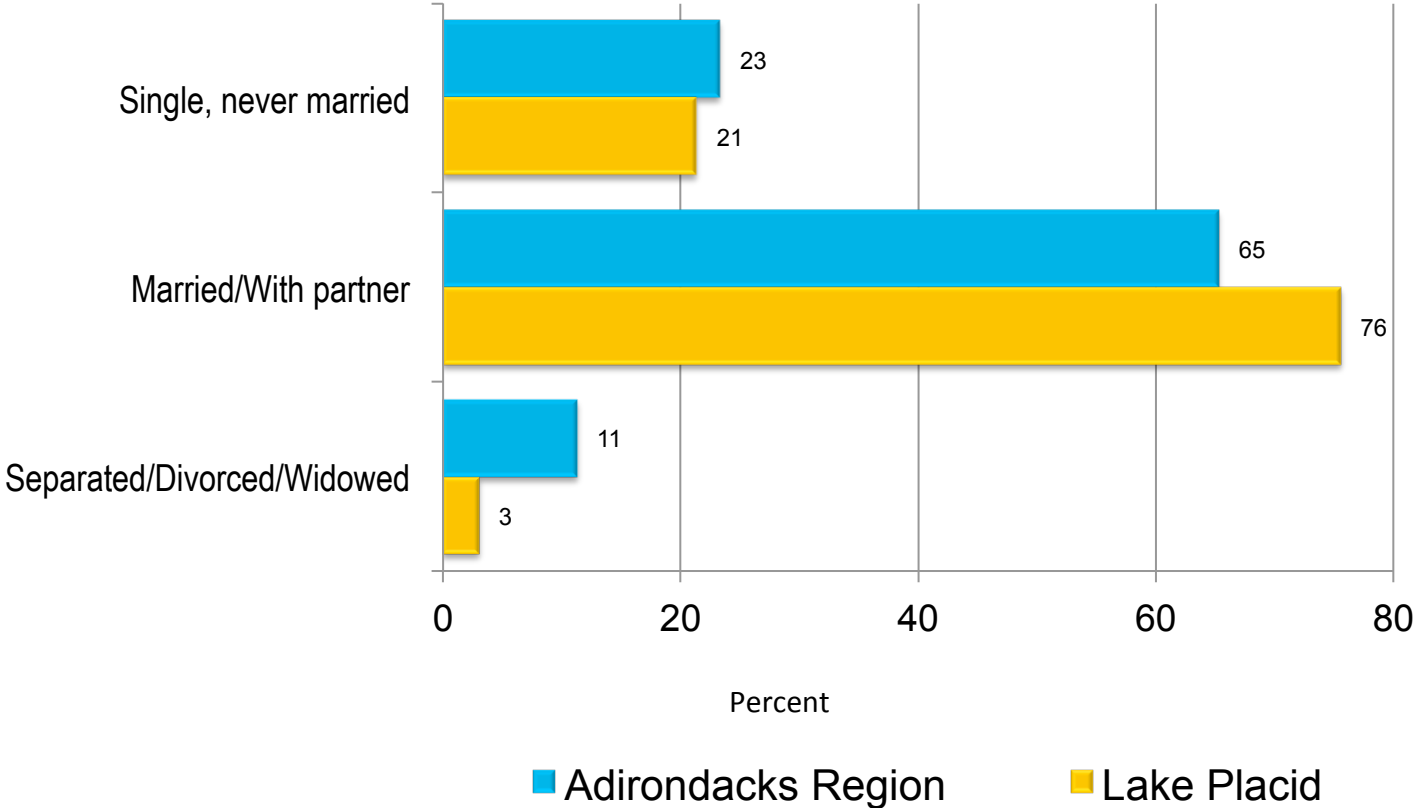
Average Lake Placid = 38.9



Marital Status



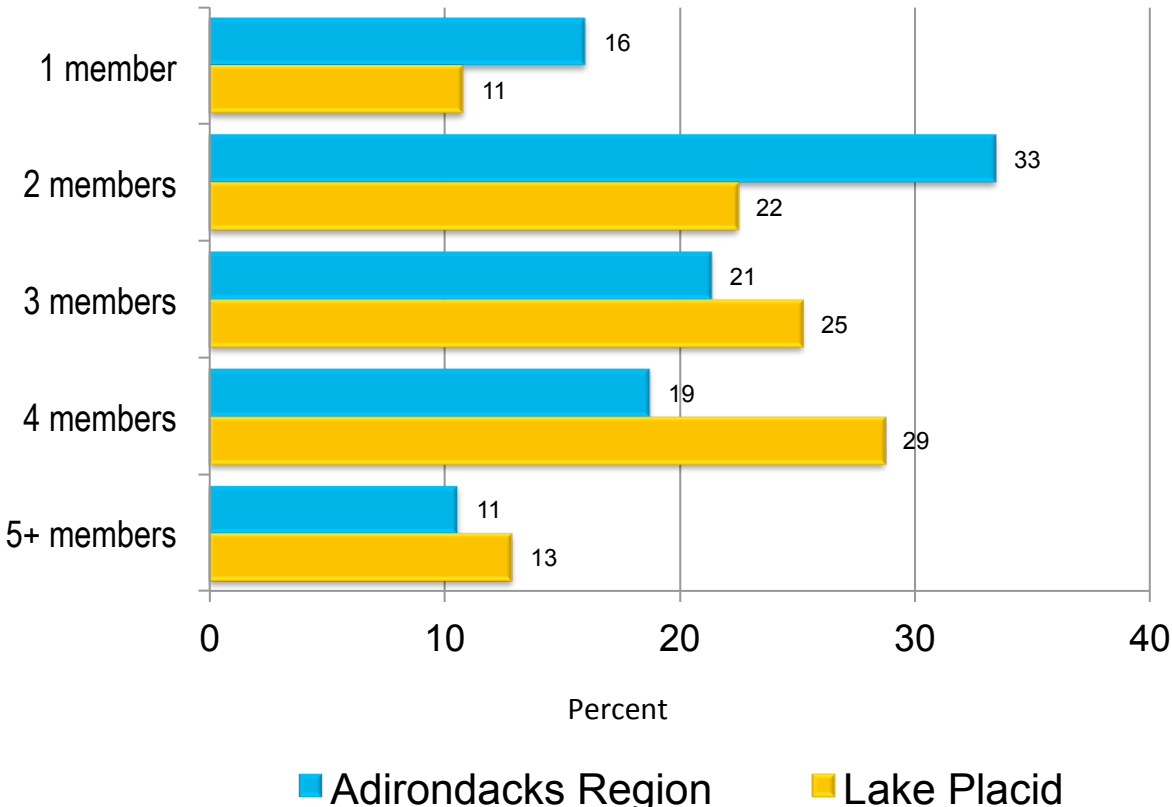
Base: Adult Overnight Trips



Household Size



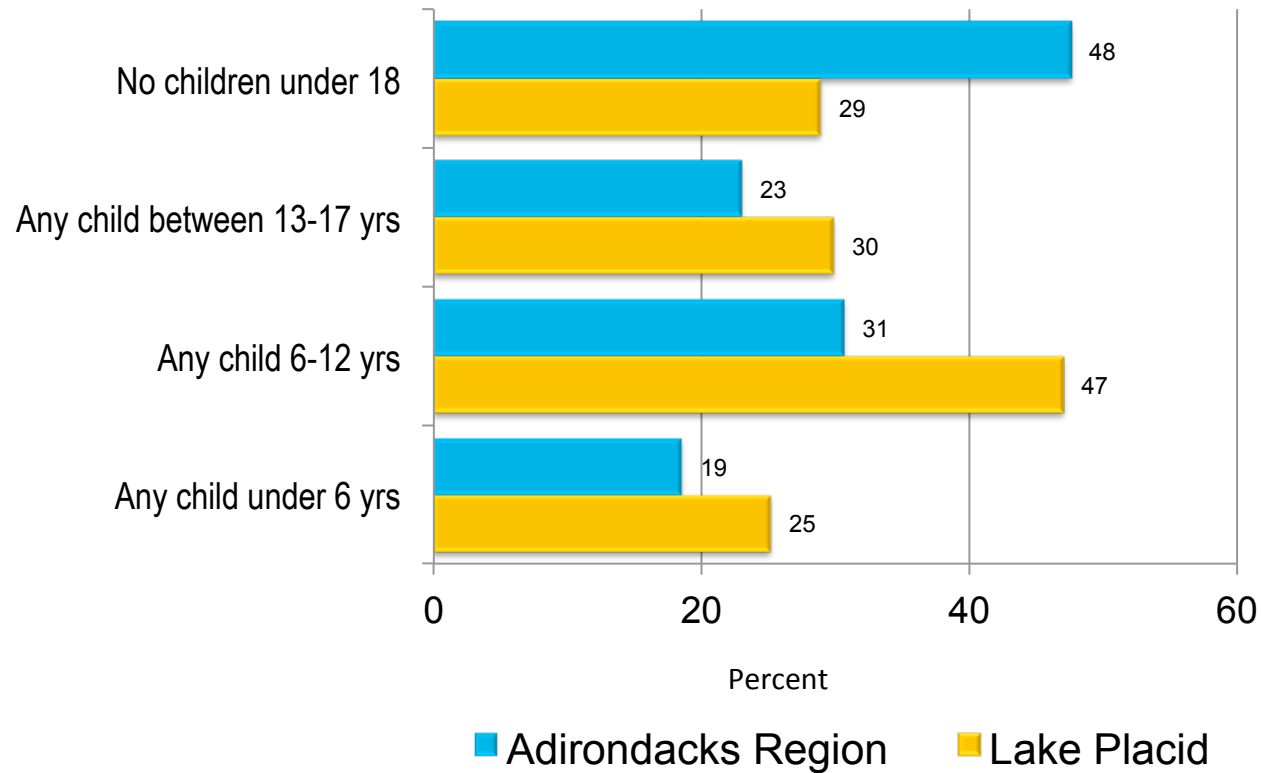
Base: Adult Overnight Trips



Children in Household



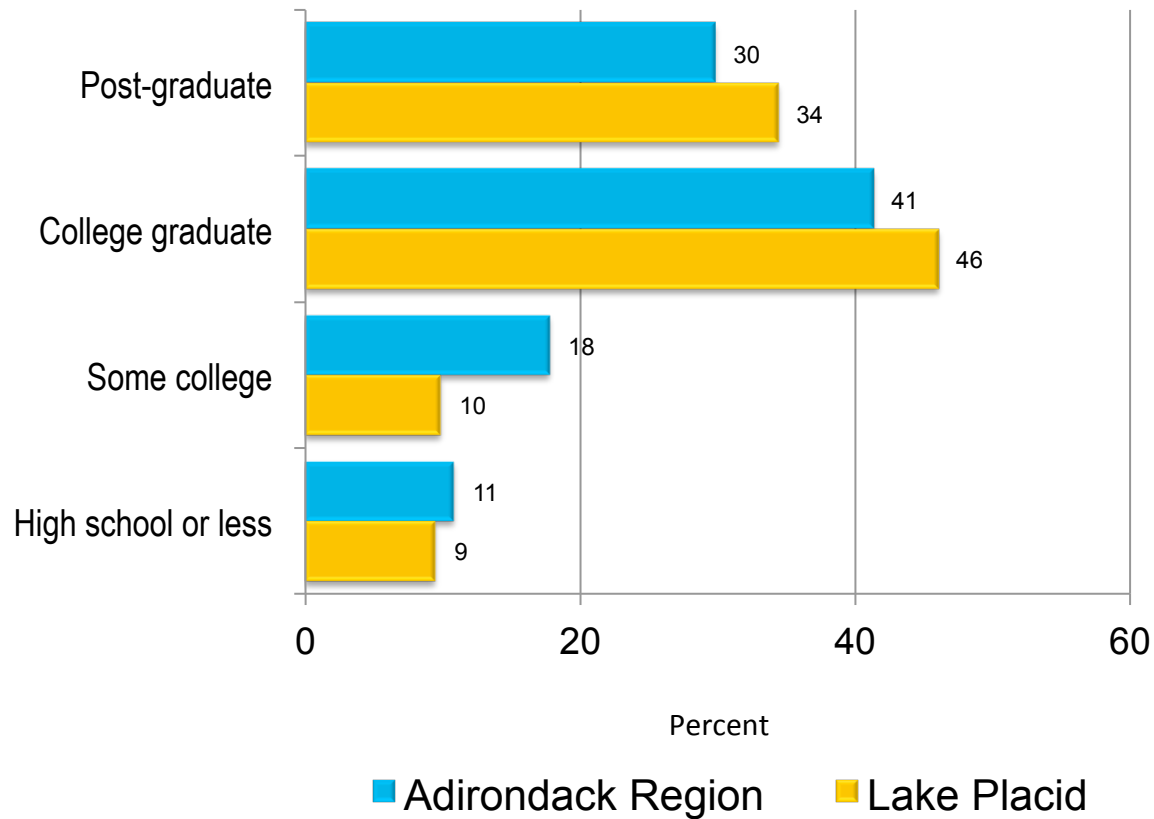
Base: Adult Overnight Trips



Education



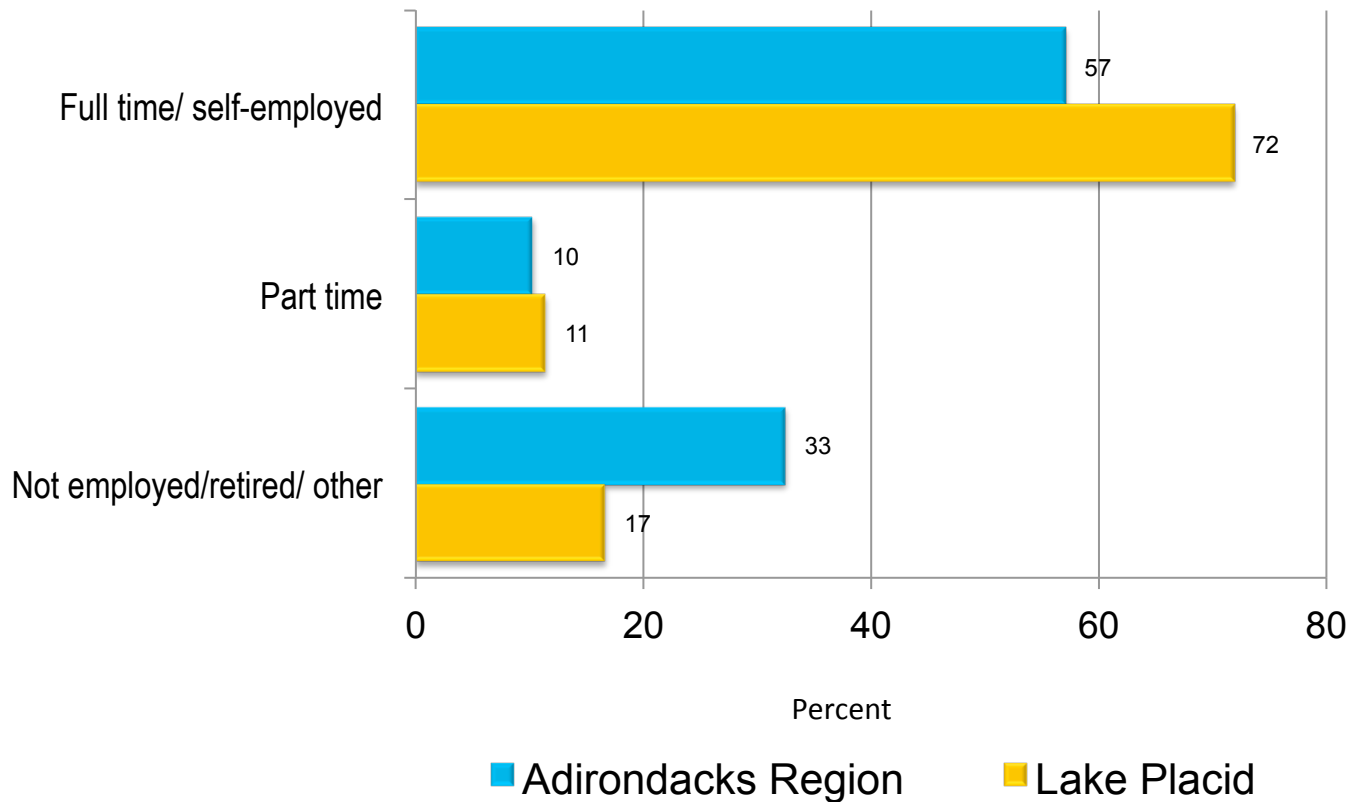
Base: Adult Overnight Trips



Employment



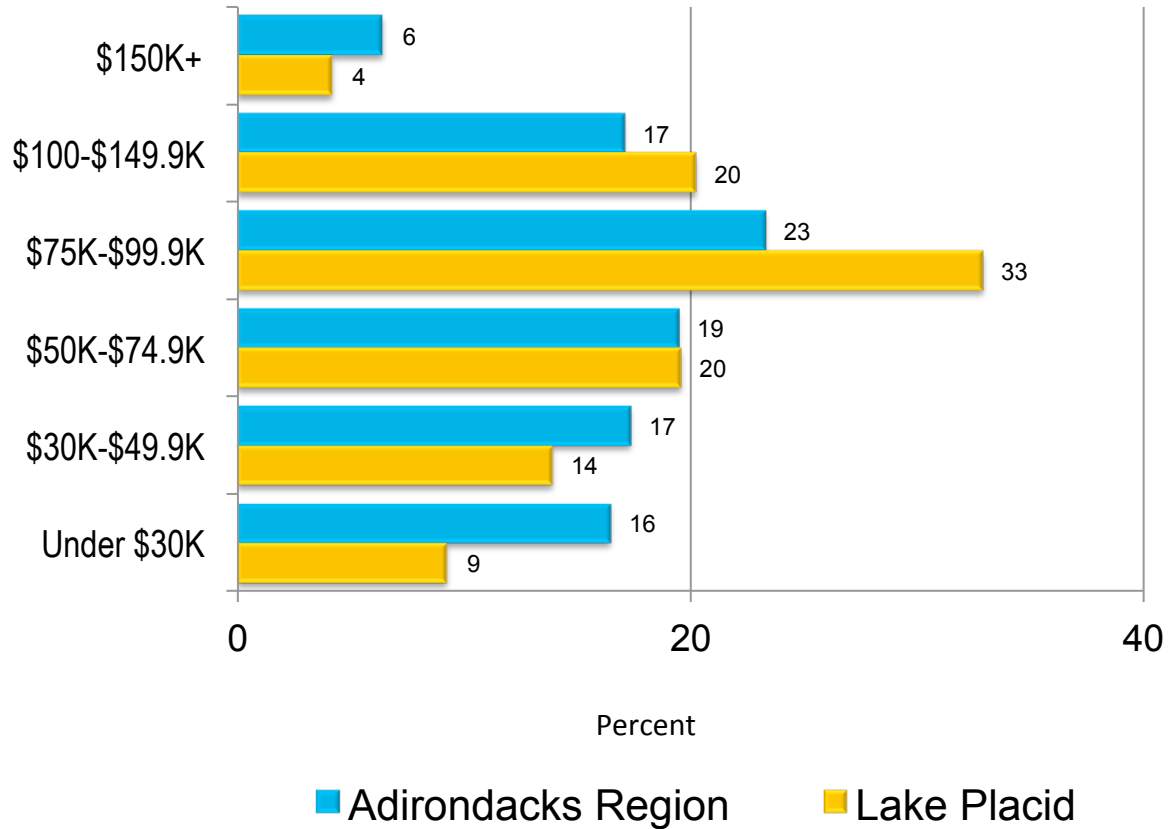
Base: Adult Overnight Trips



Household Income



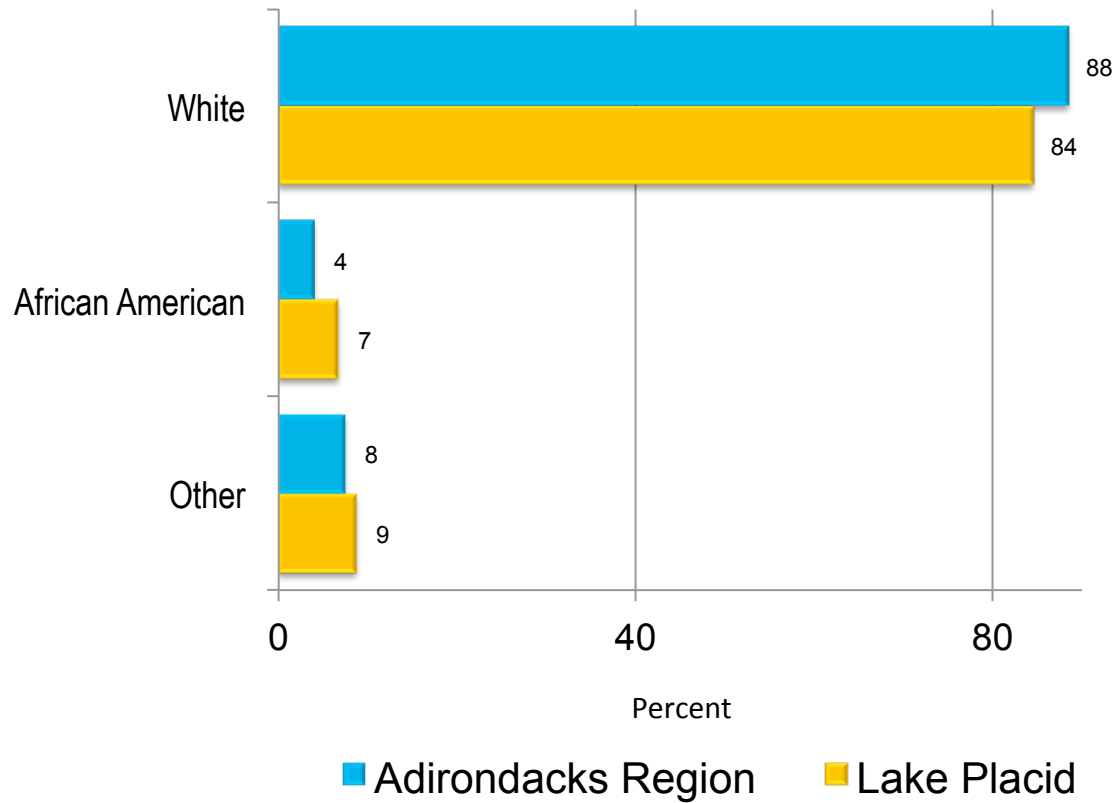
Base: Adult Overnight Trips



Race



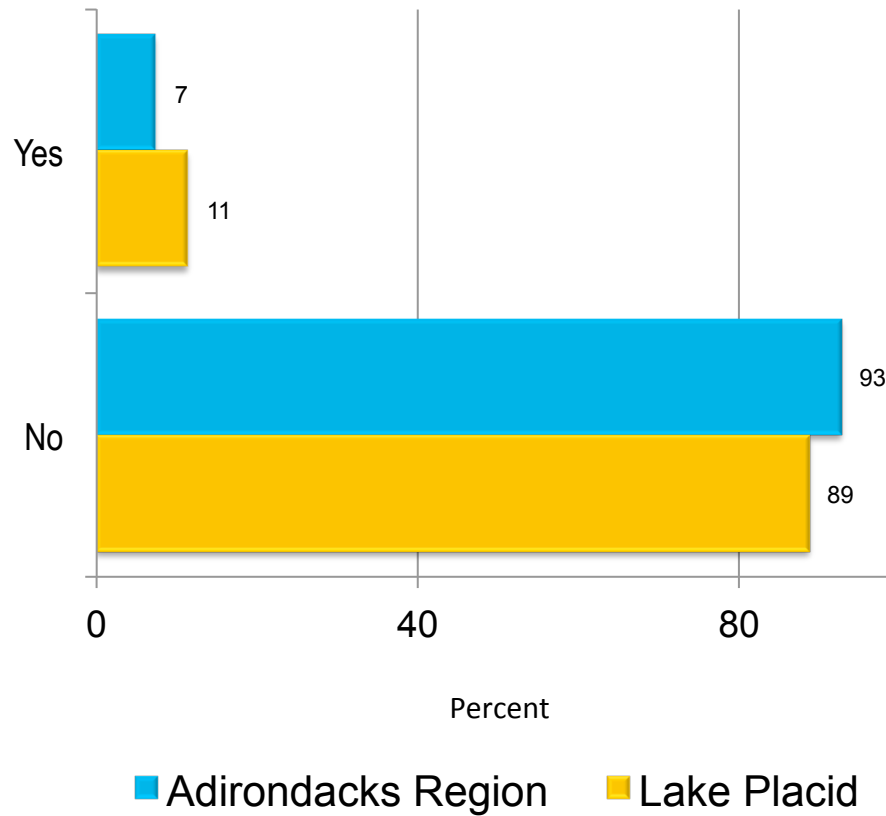
Base: Adult Overnight Trips



Hispanic Background



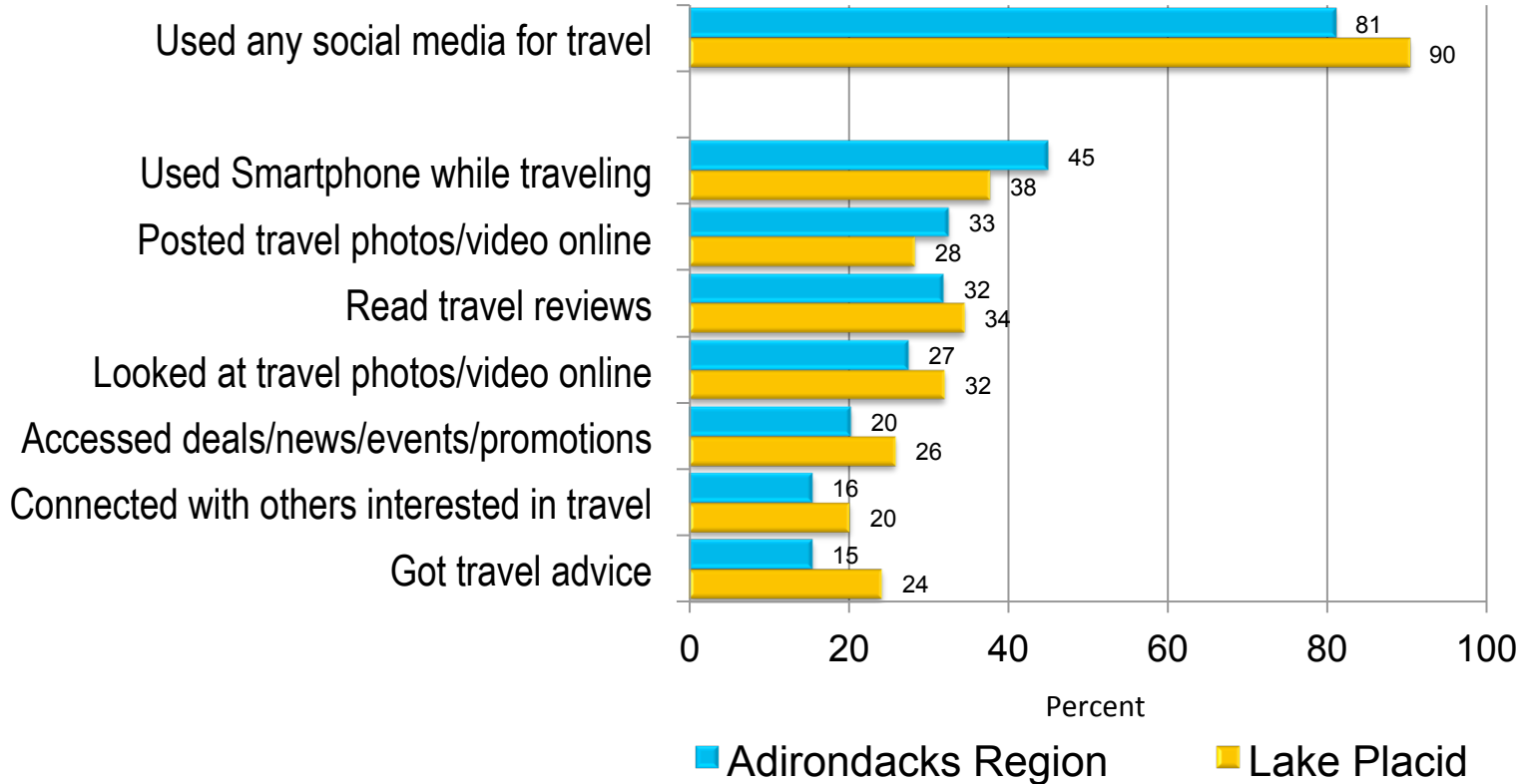
Base: Adult Overnight Trips



Use of Social Media for Travel



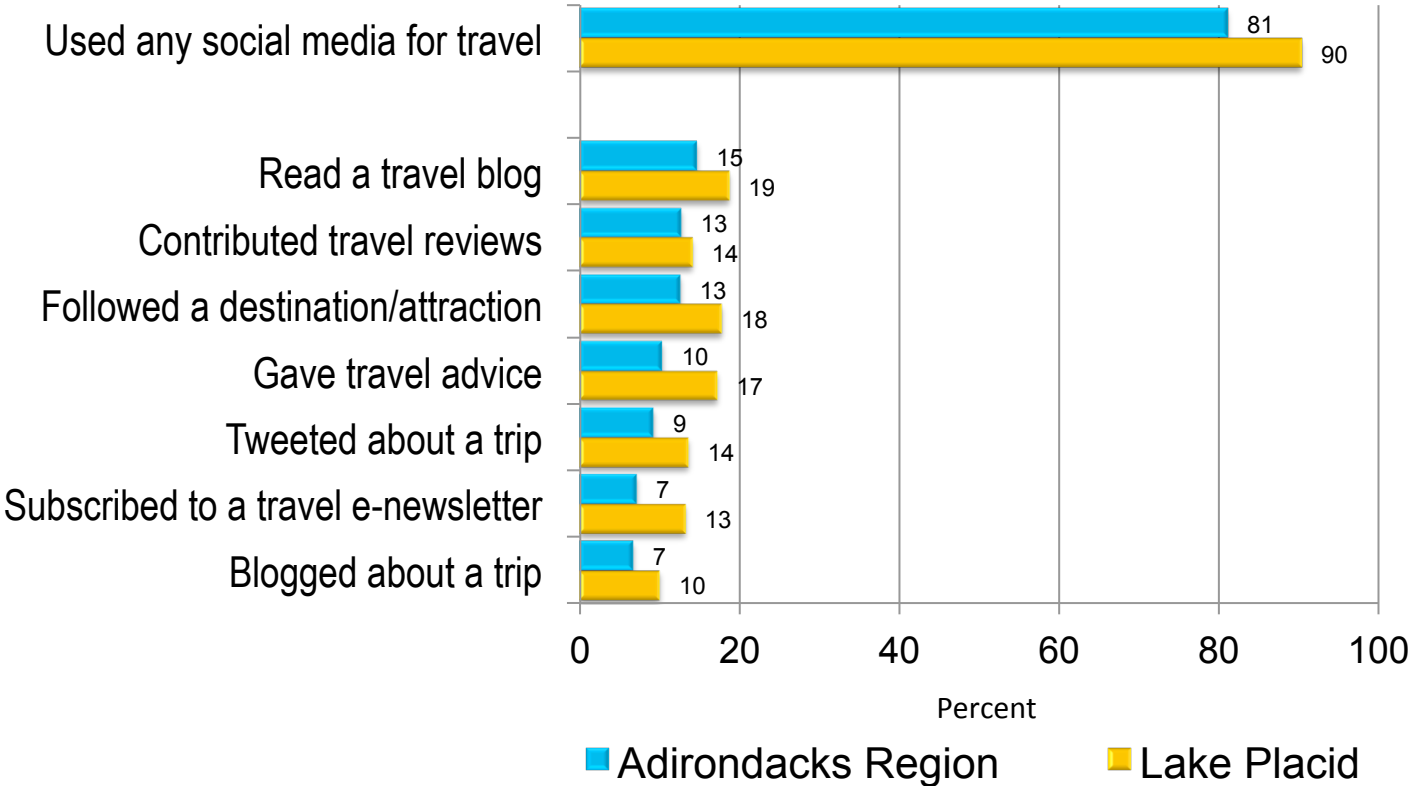
Base: Adult Overnight Trips



Use of Social Media for Travel (Cont'd)



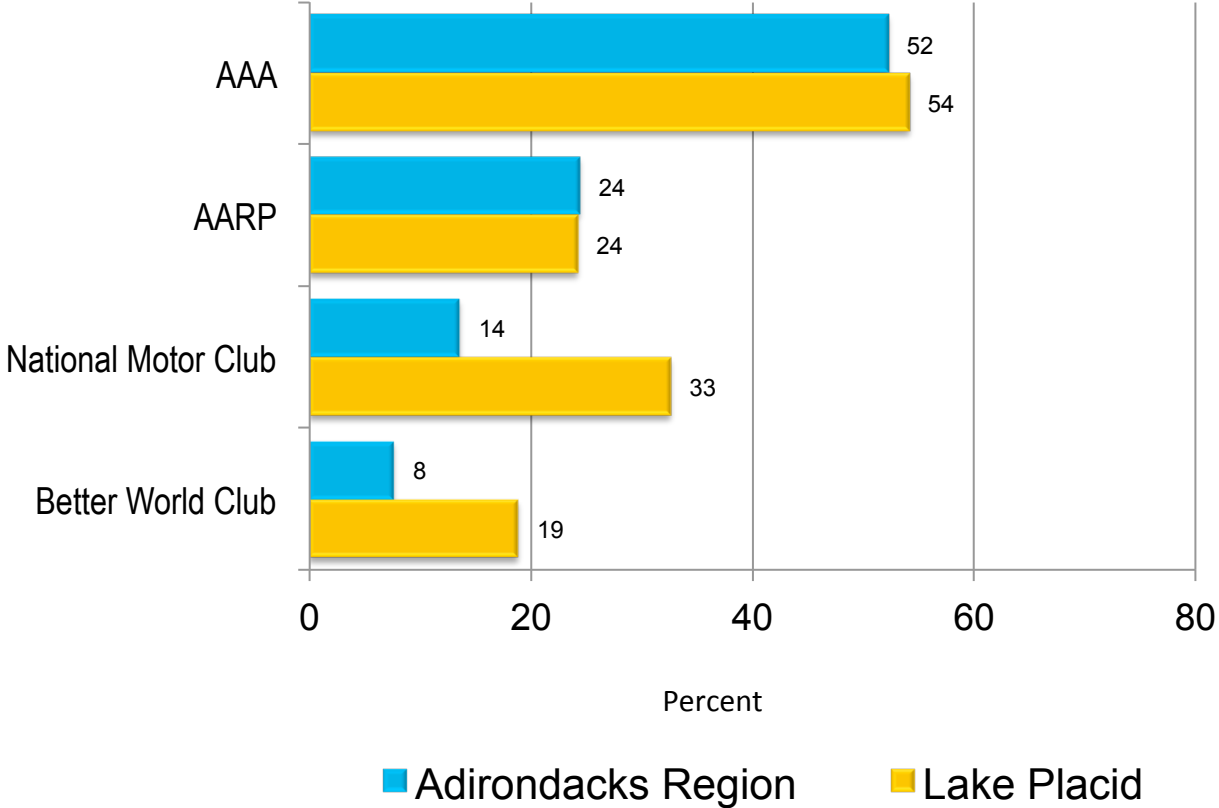
Base: Adult Overnight Trips



Club Membership



Base: Adult Overnight Trips



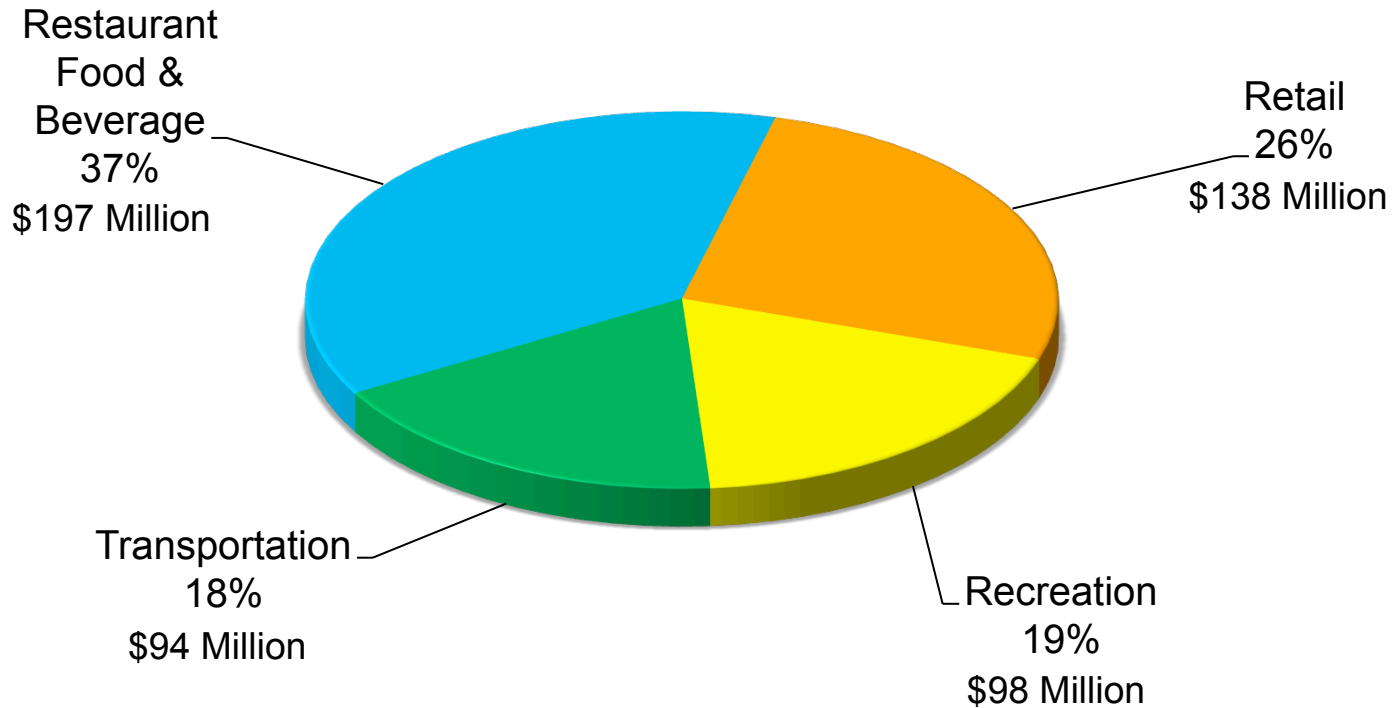


Day Expenditures – Adirondacks Region

Total Day Spending in Adirondacks — by Sector



Total Spending = \$526 million

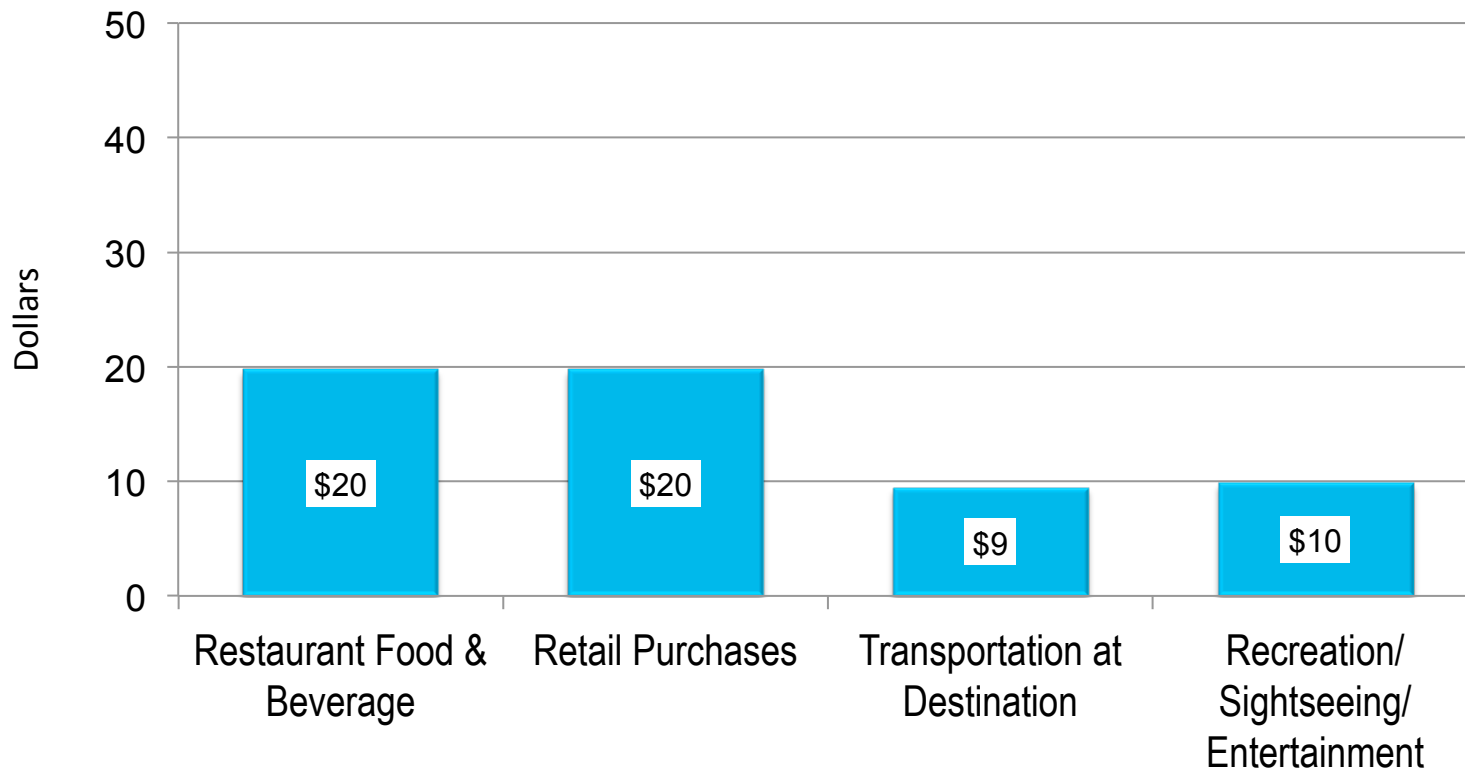


Average Per Person Expenditures on Day Trips — By Sector



Base: Day Trips to Adirondacks

Total Per Person* = \$53



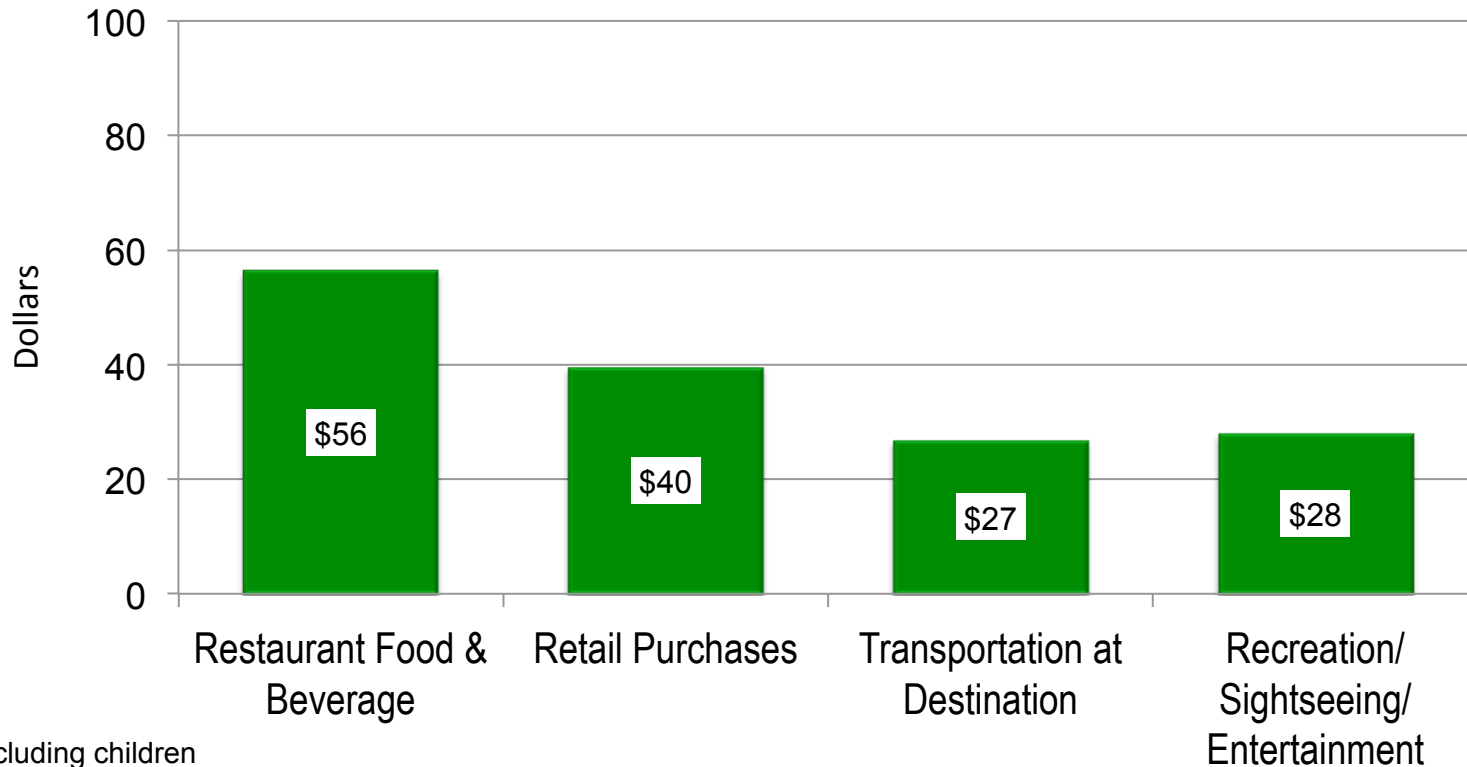
*Including children

Average Per Party Expenditures on Day Trips



Base: Day Trips to Adirondacks

Total Per Party* = \$151



*Including children

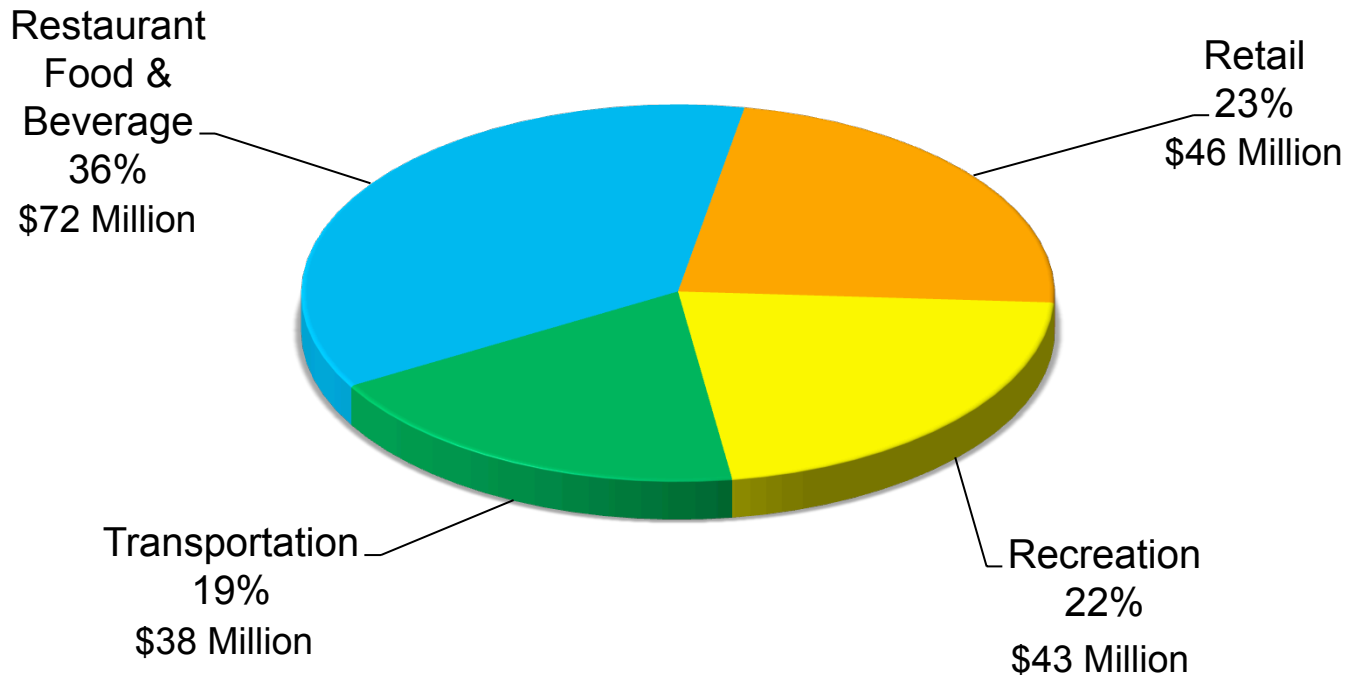


Day Expenditures – Lake Placid

Total Day Spending in Lake Placid — by Sector



Total Spending = \$199 million

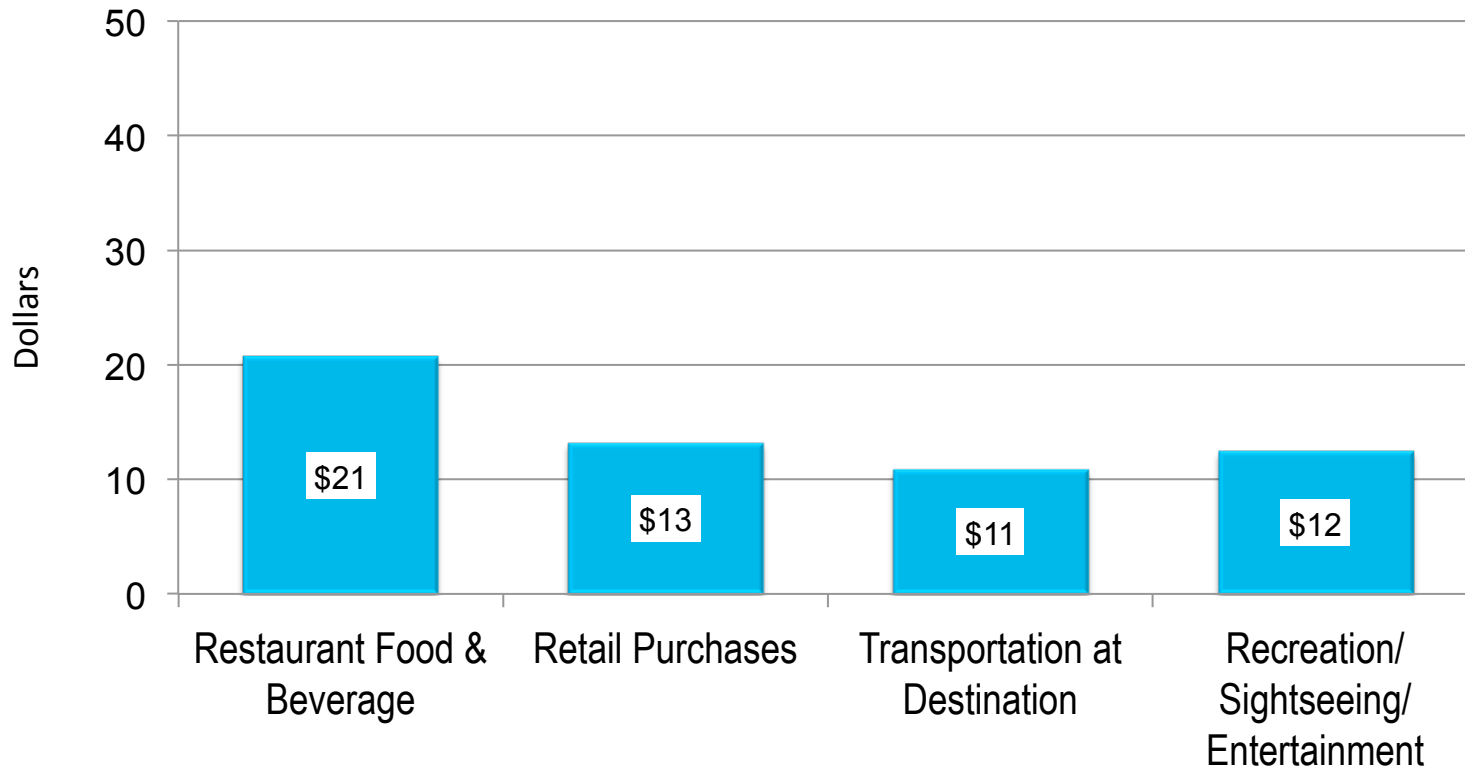


Average Per Person Expenditures on Day Trips — By Sector



Base: Day Trips to Lake Placid

Total Per Person* = \$57



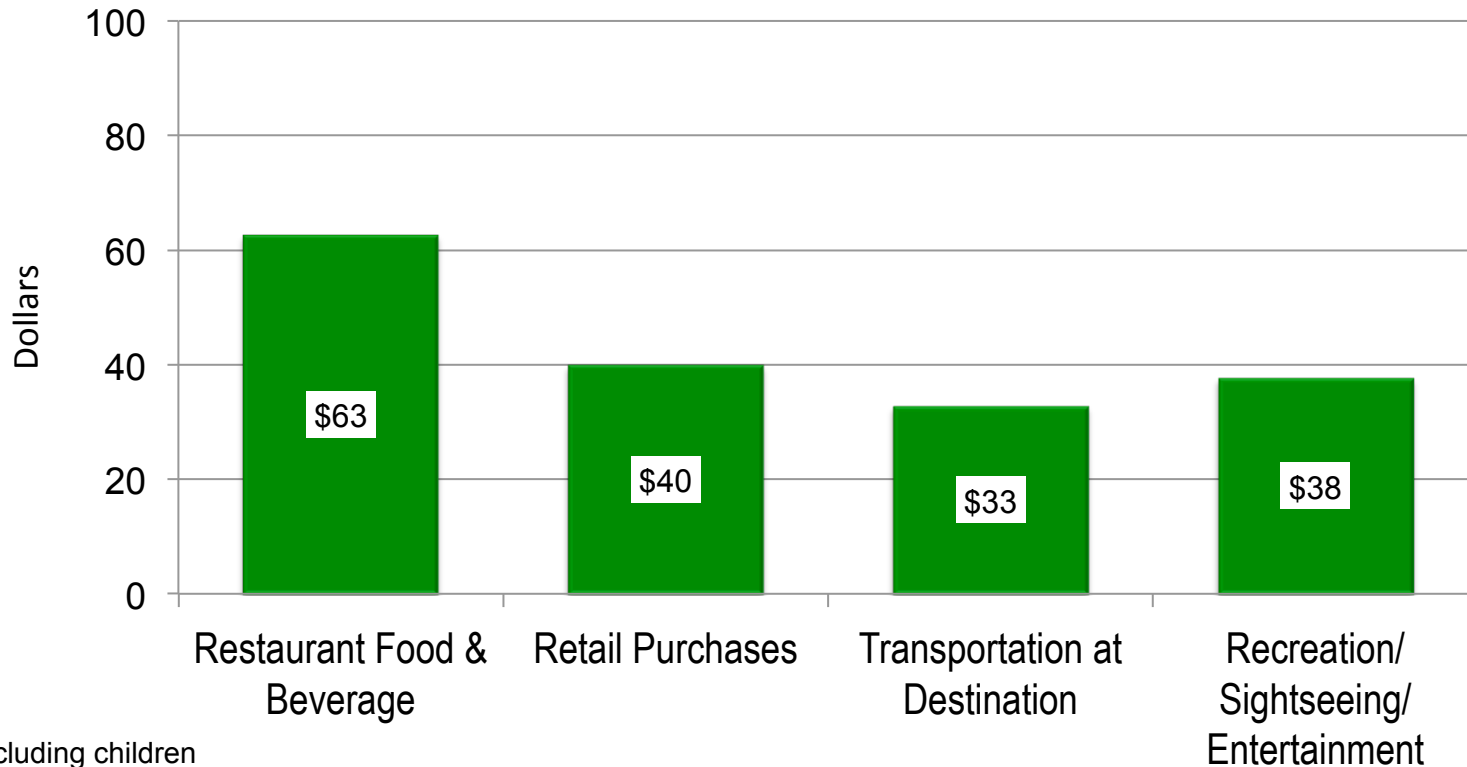
*Including children

Average Per Party Expenditures on Day Trips



Base: Day Trips to Lake Placid

Total Per Party* = \$173



*Including children



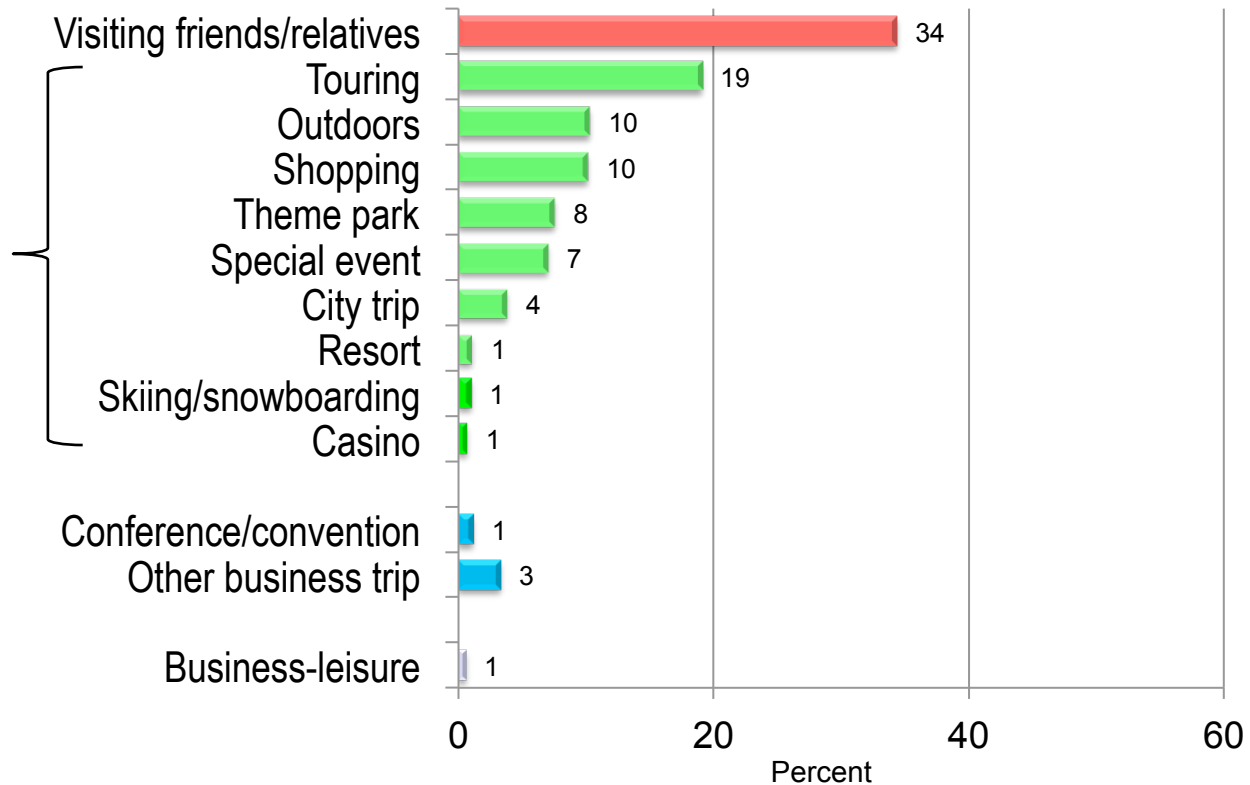
Day Trip Characteristics

Main Purpose of Trip



Base: Day Trips to Adirondacks

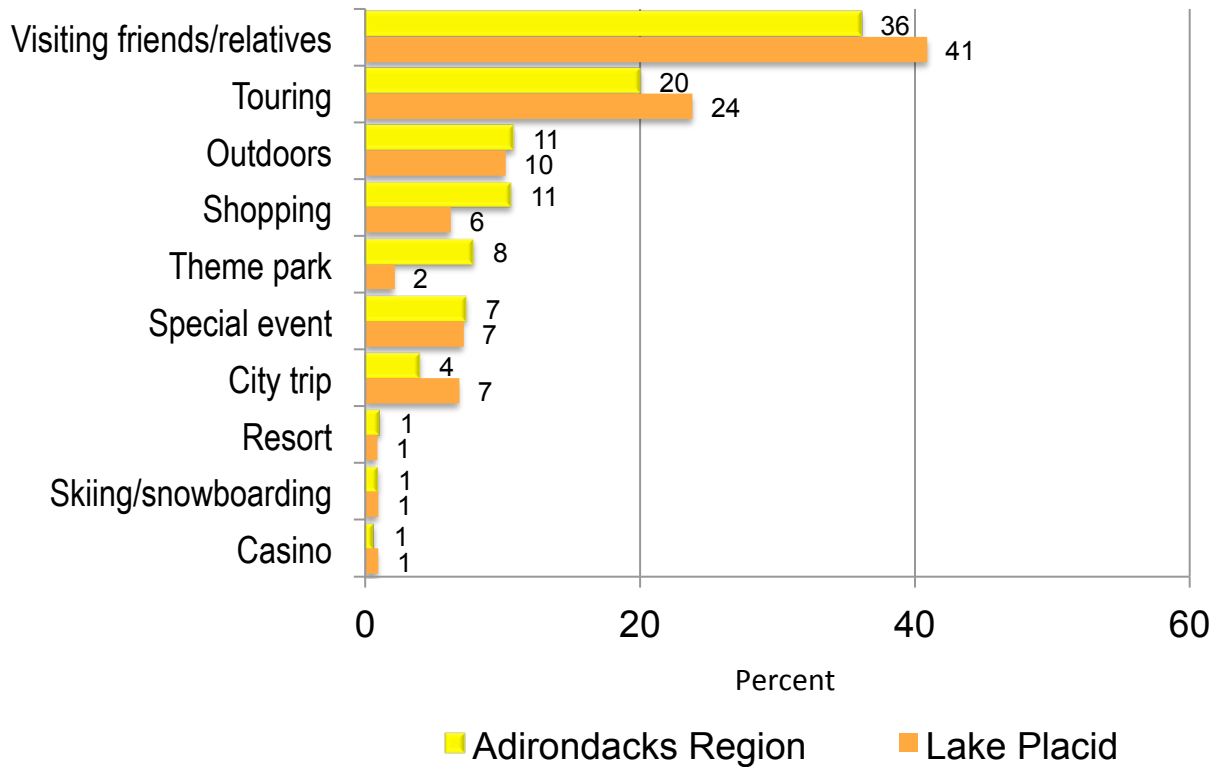
**Marketable
Trips
61%**



Main Purpose of Leisure Trip — Adirondacks Region vs. Lake Placid



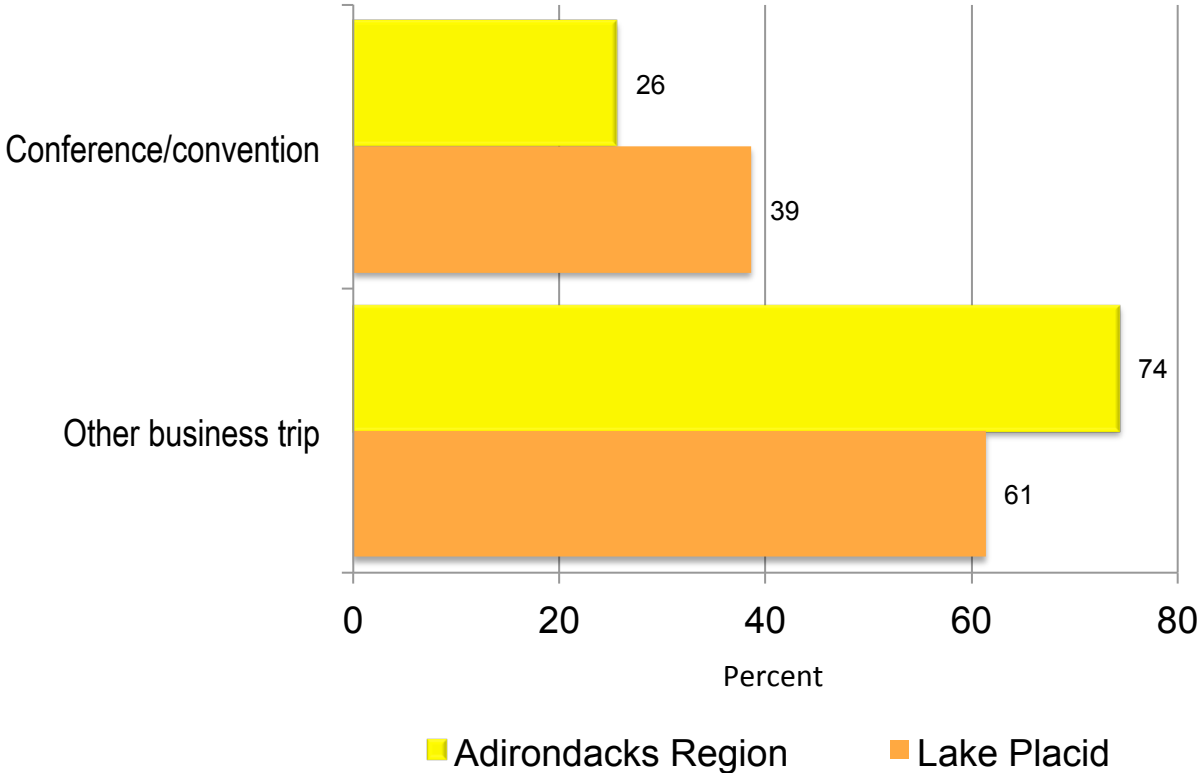
Base: Adult Day Leisure Trips



Main Purpose of Business Trip — Adirondacks Region vs. Lake Placid



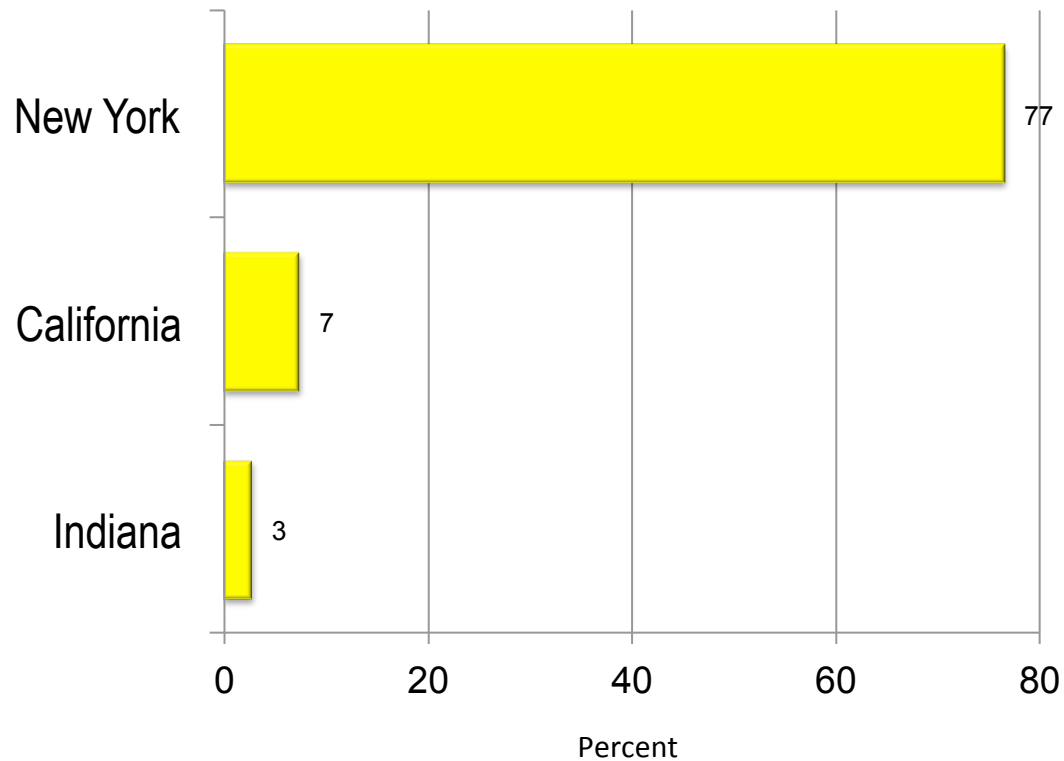
Base: Adult Day Business Trips



State Origin Of Trip



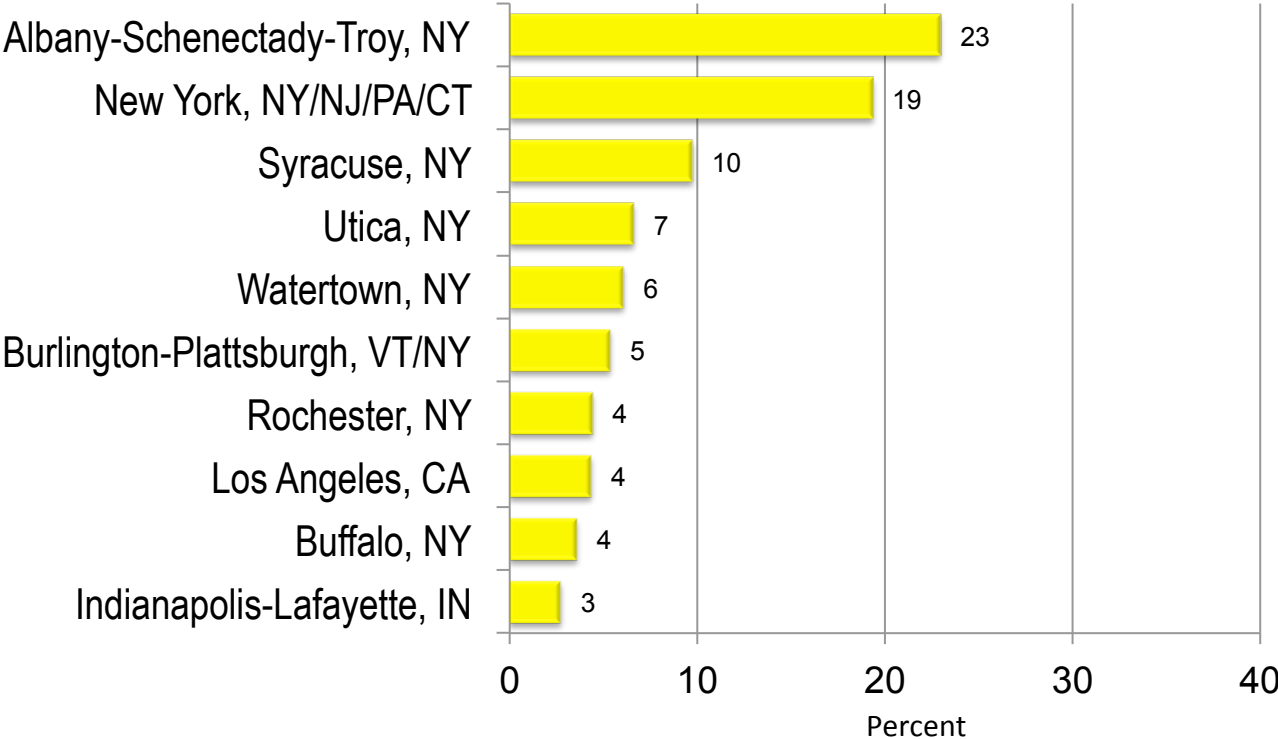
Base: Adult Day Trips to Adirondacks



DMA Origin Of Trip



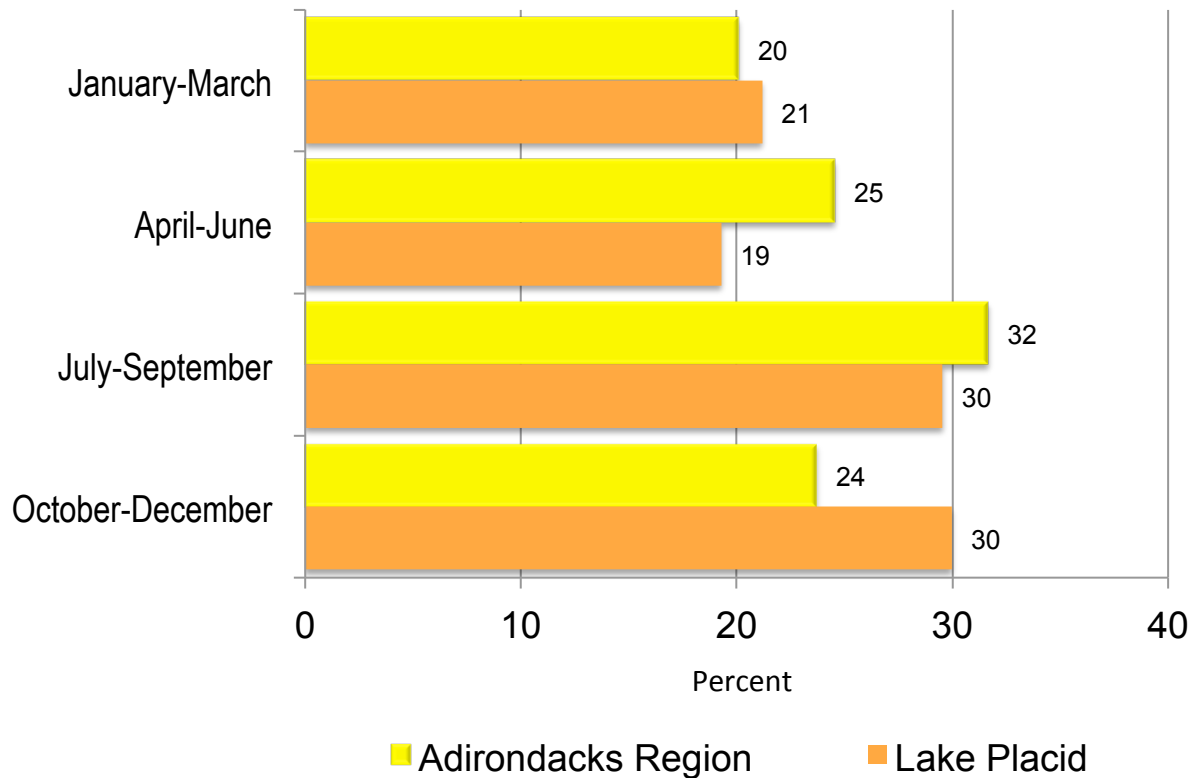
Base: Adult Day Trips to Adirondacks



Season of Trip



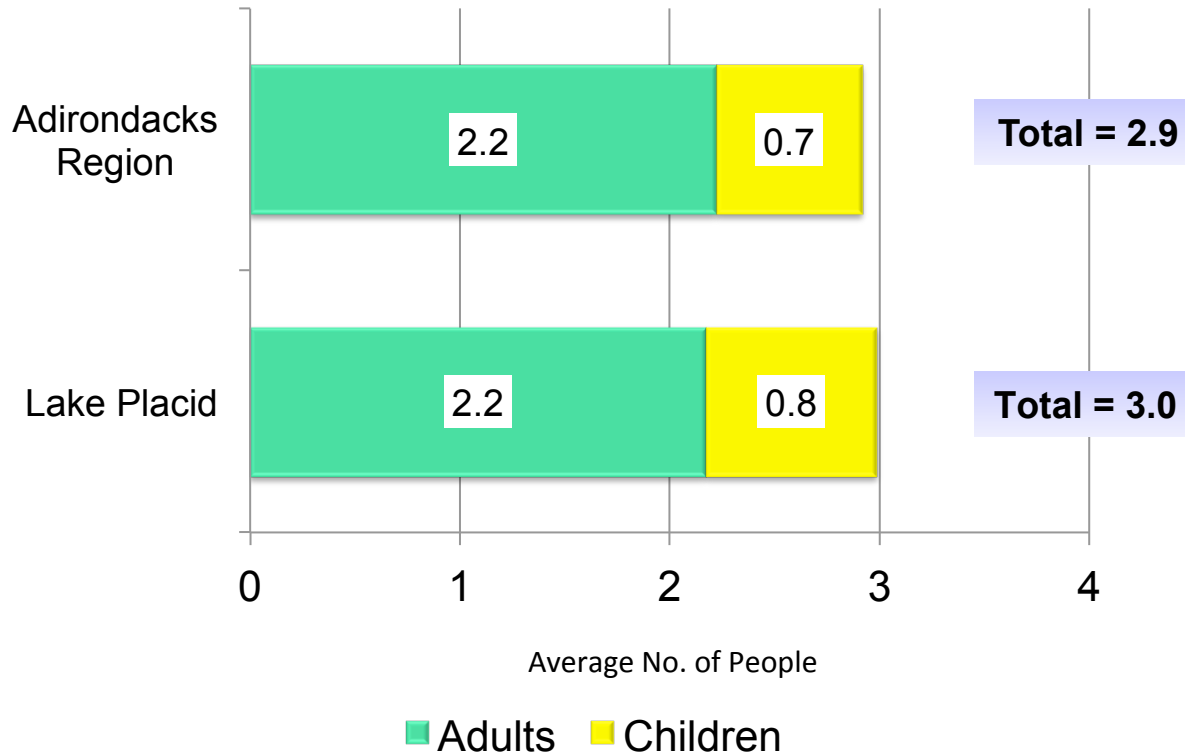
Base: Total Day Trips



Size of Travel Party



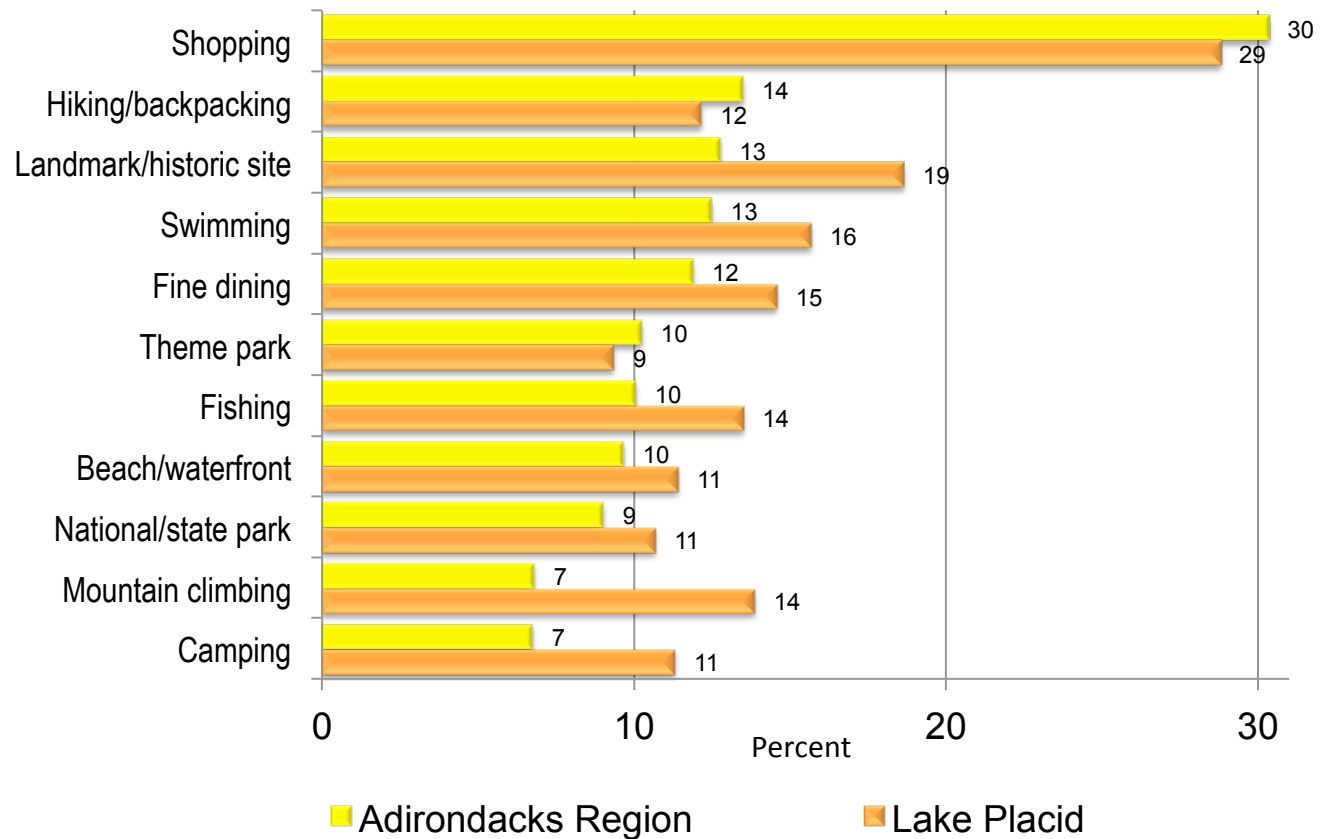
Base: Adult Day Trips



Activities and Experiences



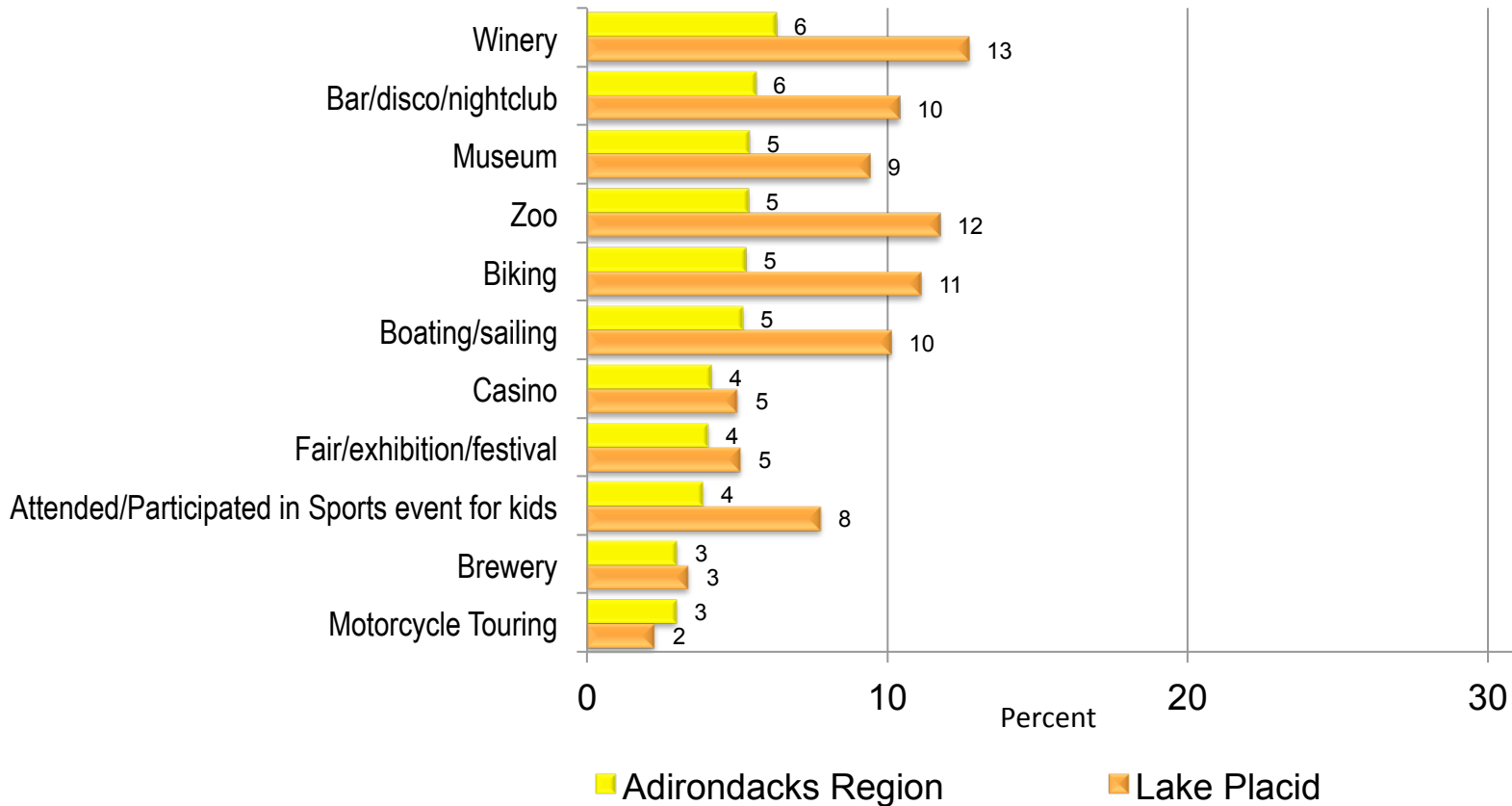
Base: Adult Day Trips



Activities and Experiences (Cont'd)



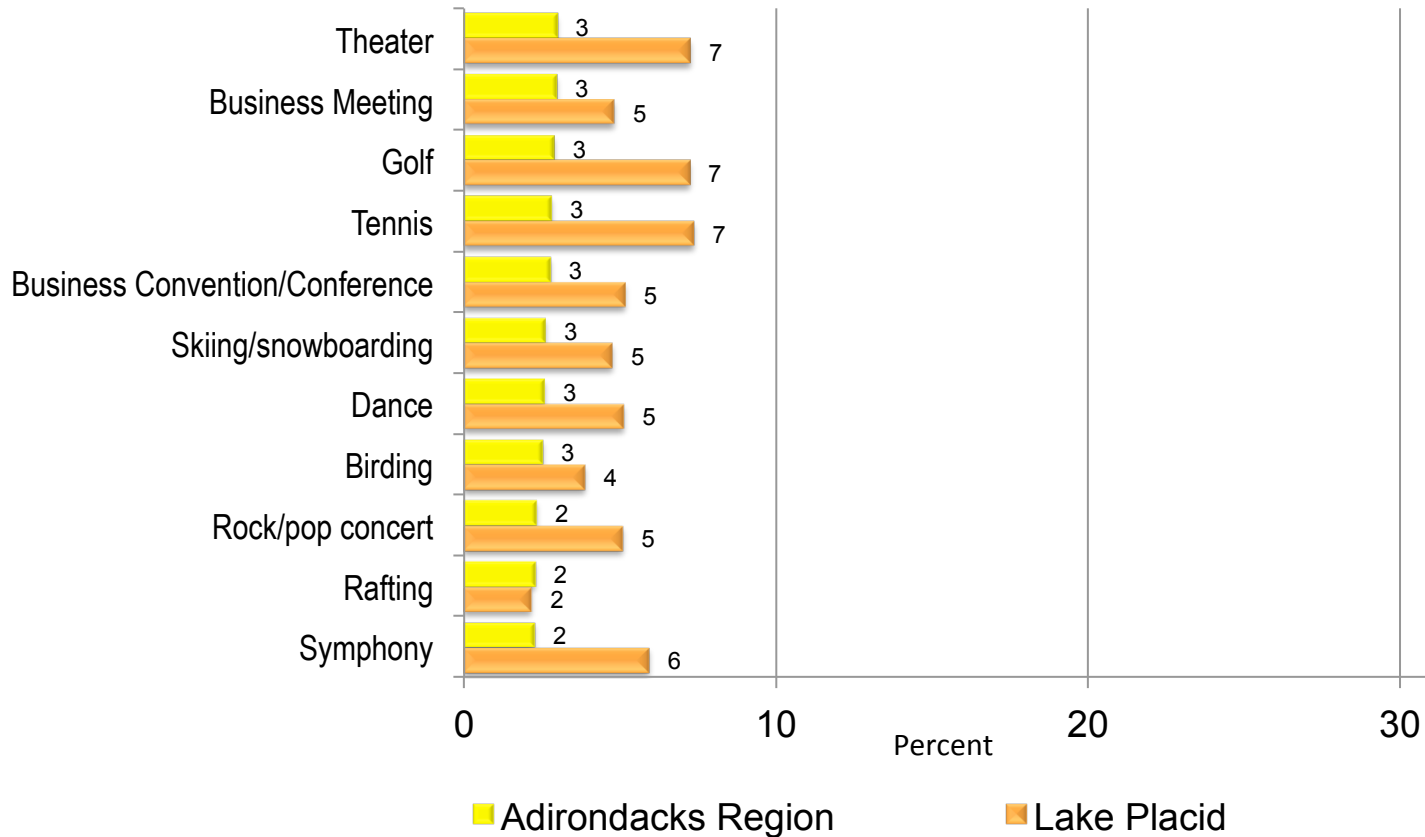
Base: Adult Day Trips



Activities and Experiences (Cont'd)



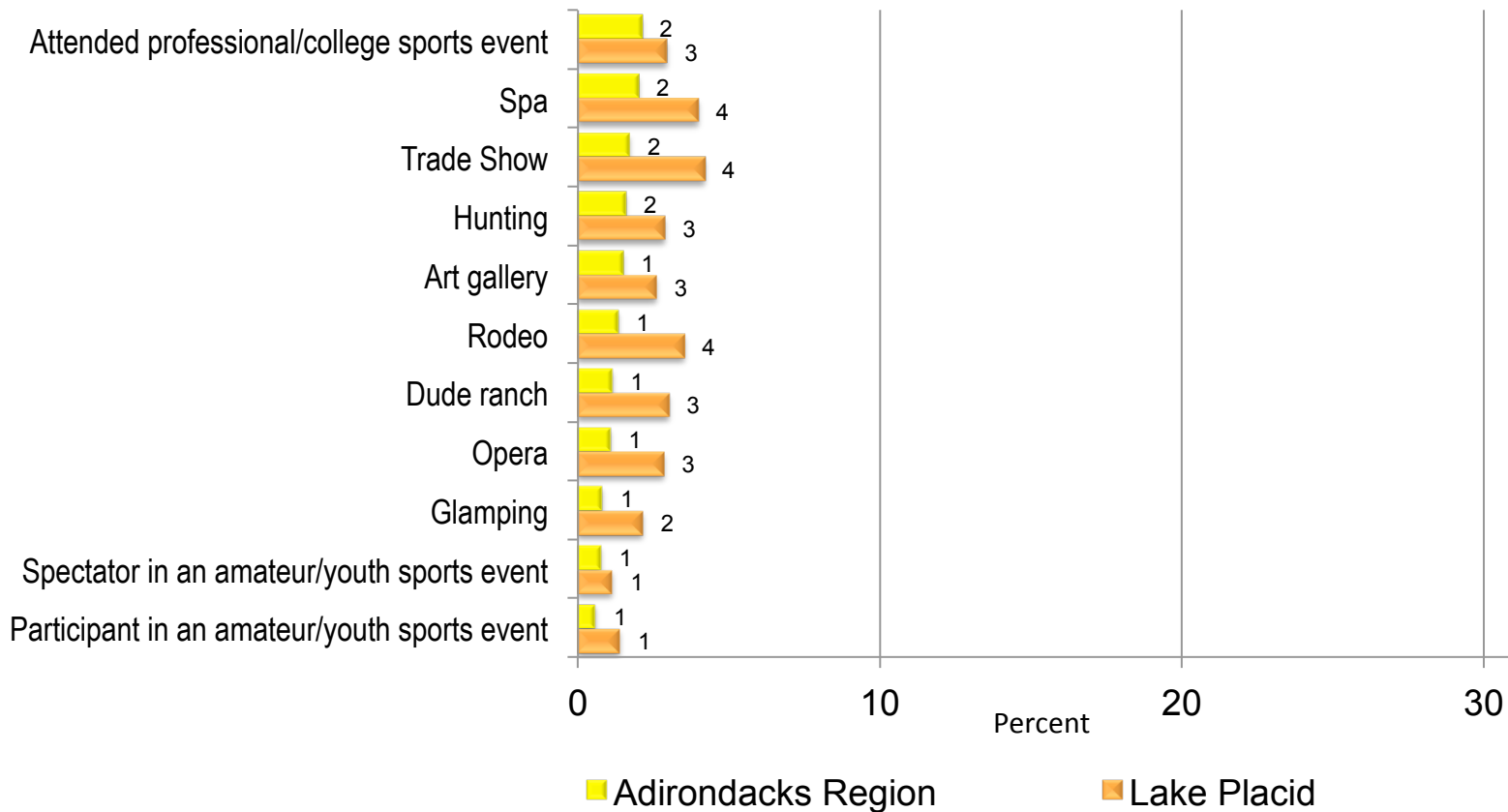
Base: Adult Day Trips



Activities and Experiences (Cont'd)



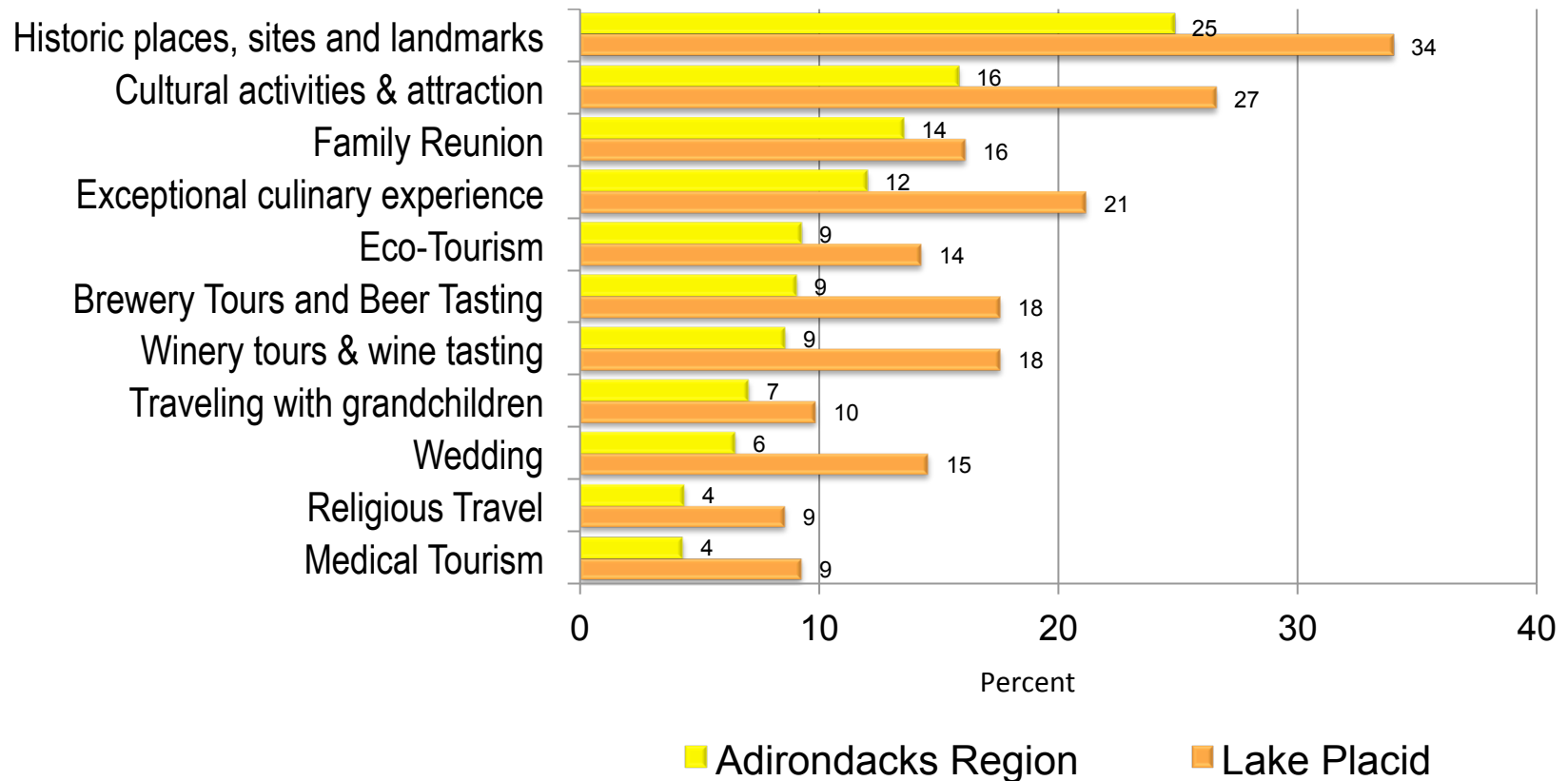
Base: Adult Day Trips



Activities of Special Interest



Base: Adult Day Trips



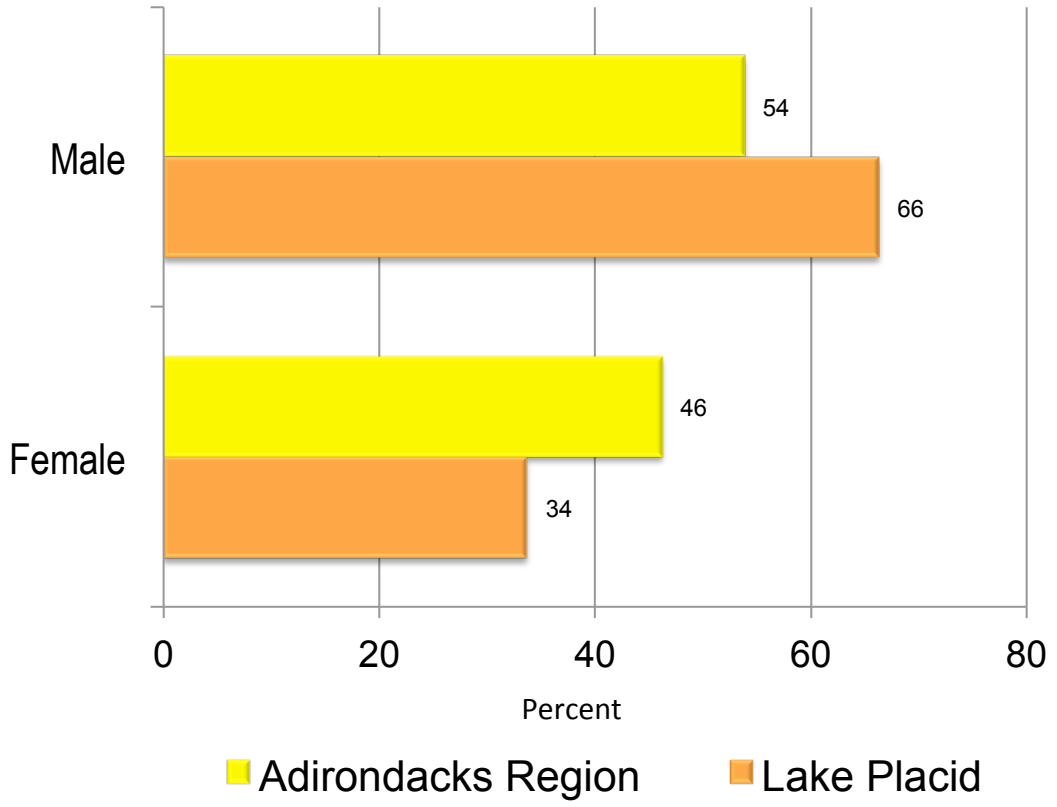


Demographic Profile of Day Visitors

Gender



Base: Adult Day Trips



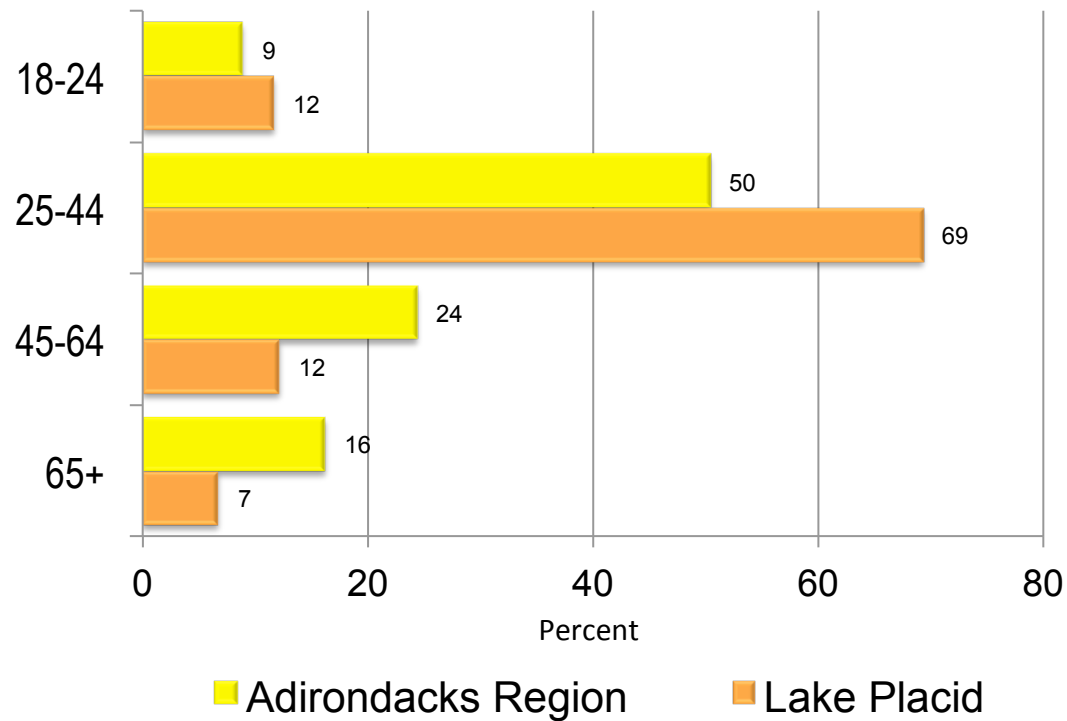
Age



Base: Adult Day Trips

Average Adirondacks Region = 44.3

Average Lake Placid = 37.7



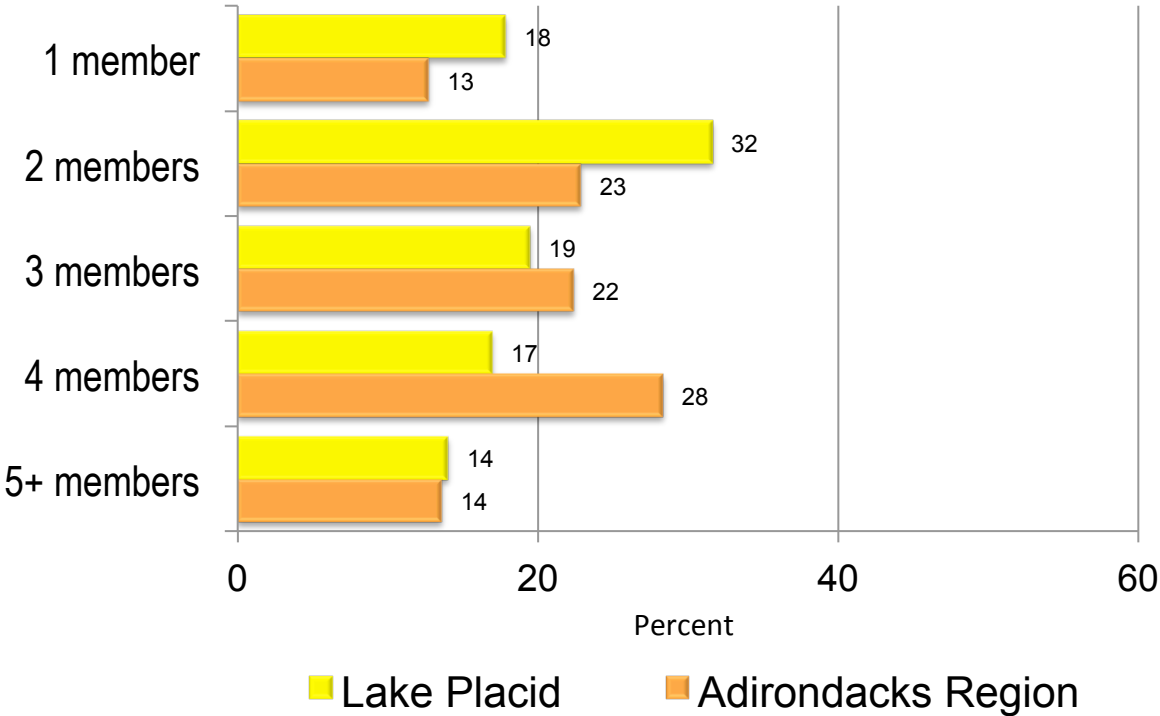
Household Size



Base: Adult Day Trips

Average Adirondacks Region = 2.9

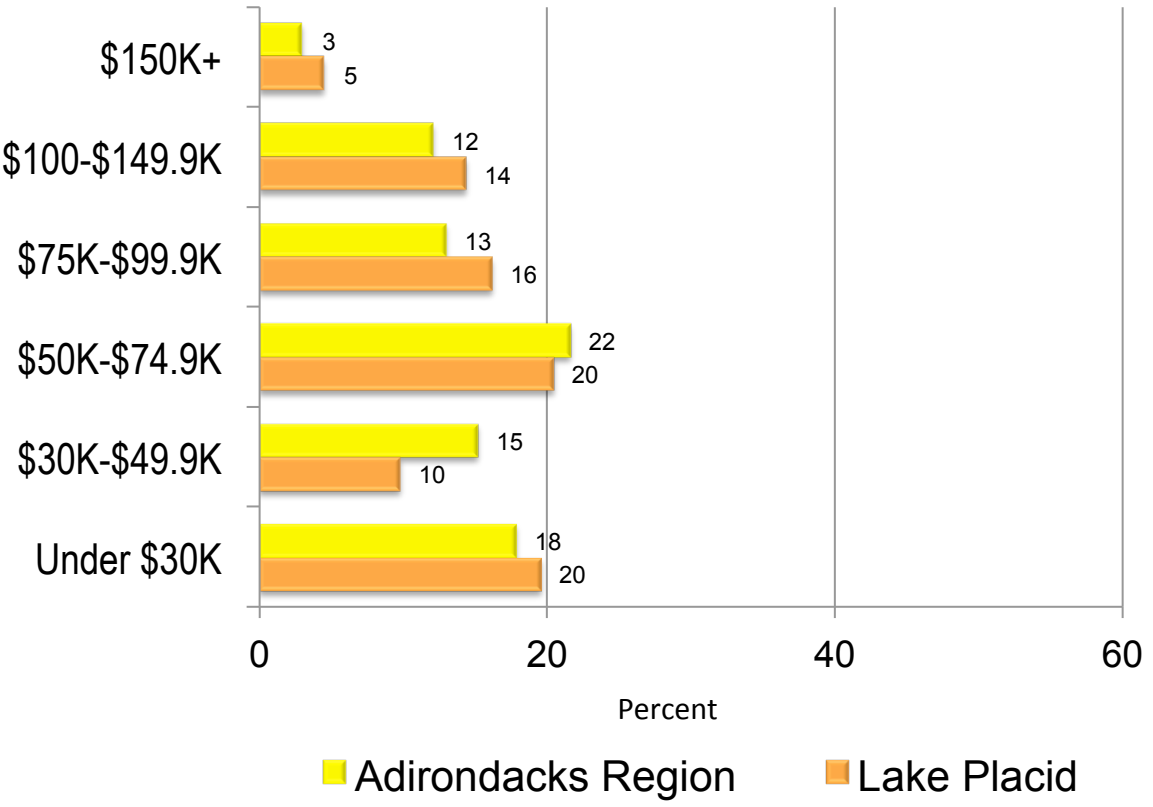
Average Lake Placid = 3.1



Household Income



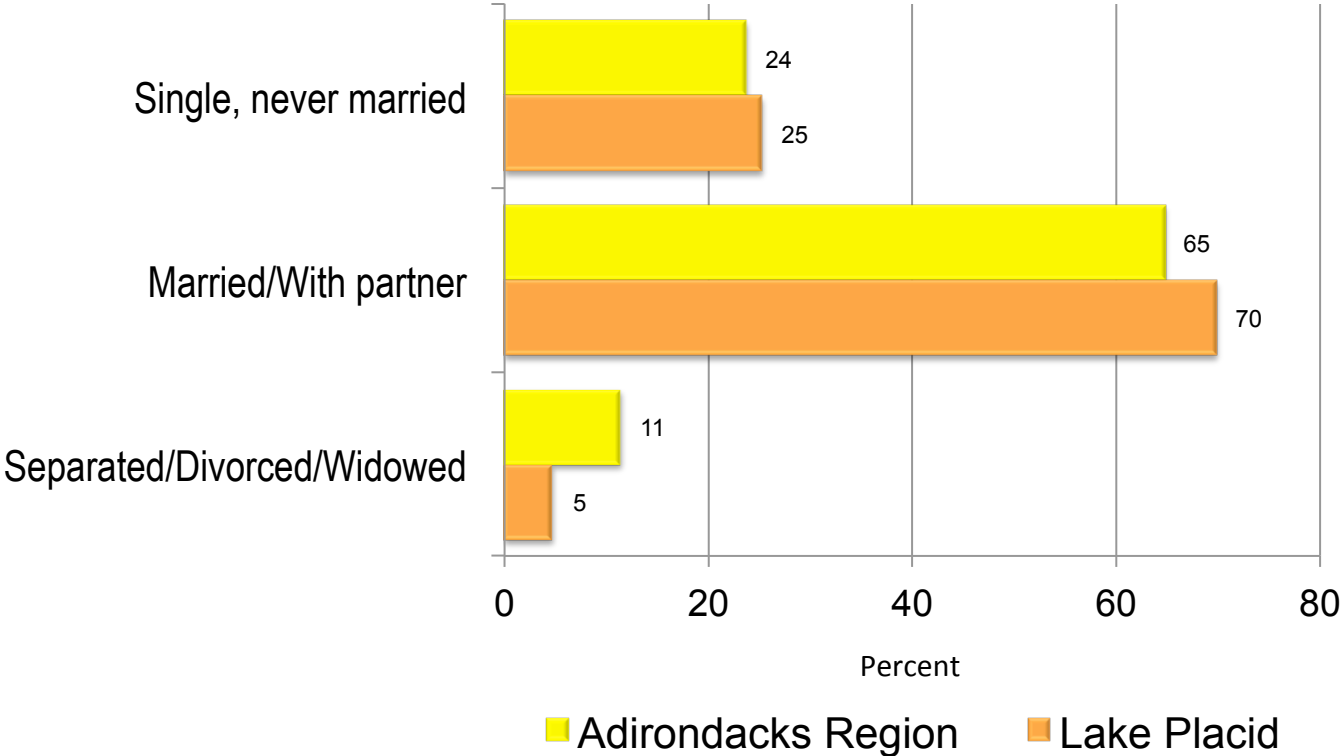
Base: Adult Day Trips



Marital Status



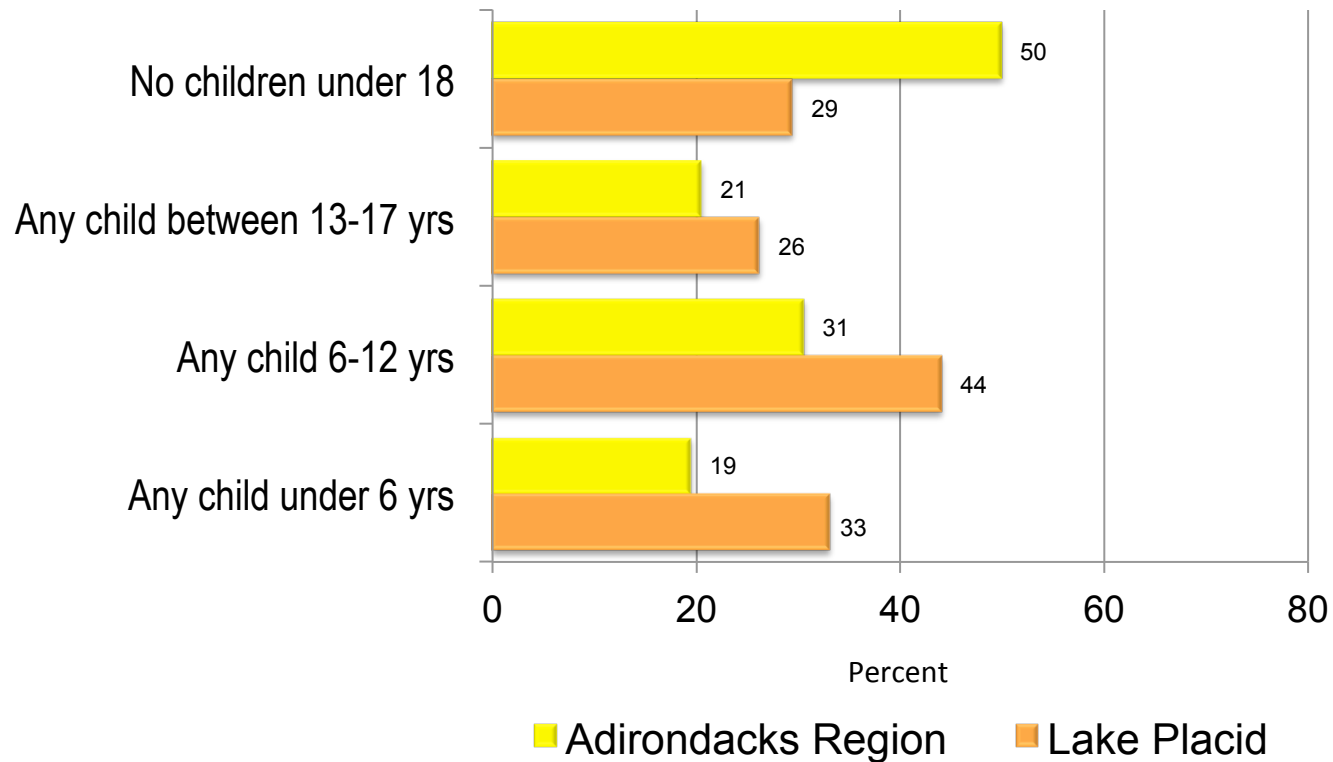
Base: Adult Day Trips



Children in Household



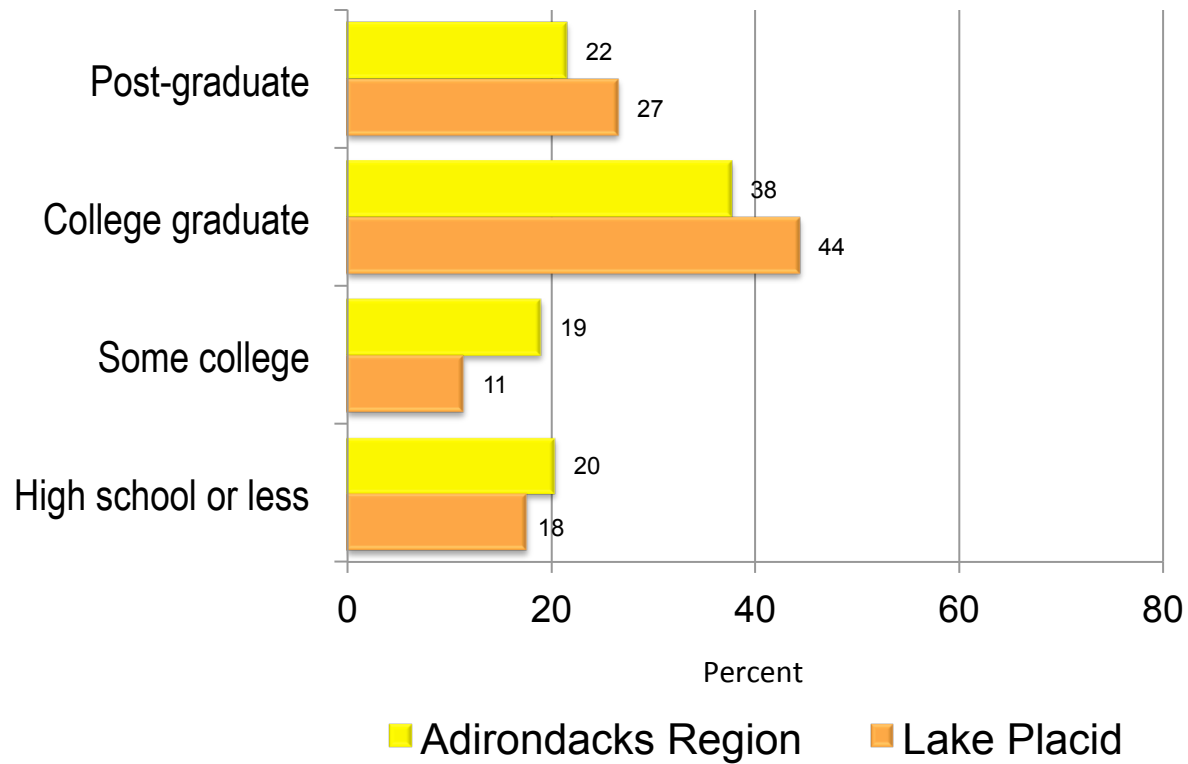
Base: Adult Day Trips



Education



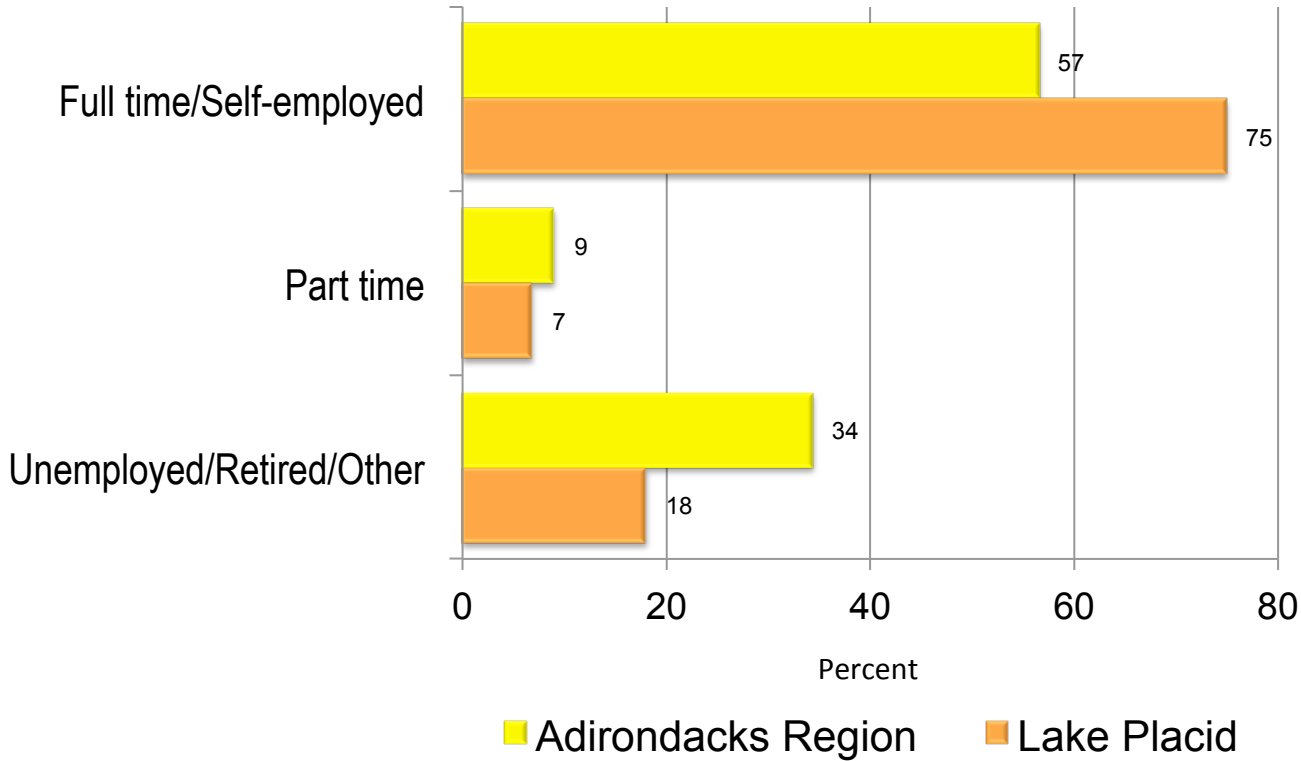
Base: Adult Day Trips



Employment



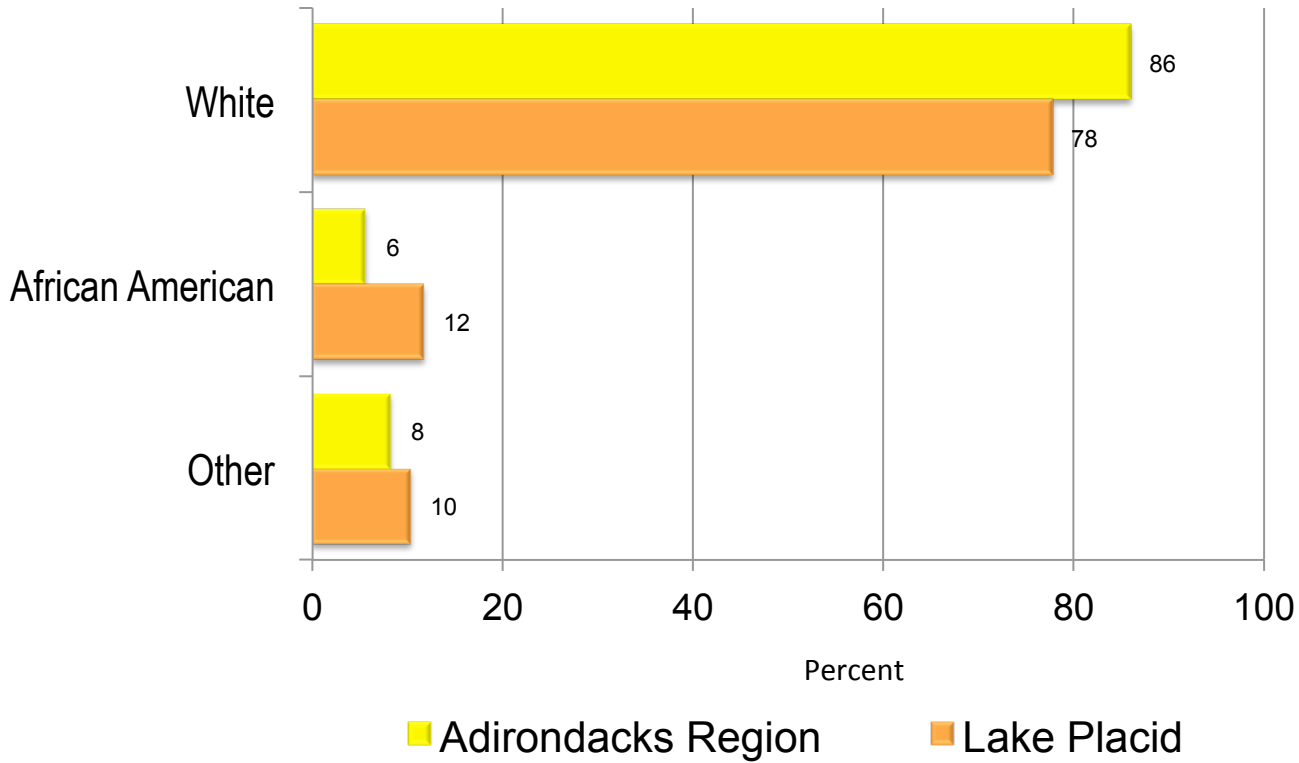
Base: Adult Day Trips



Race



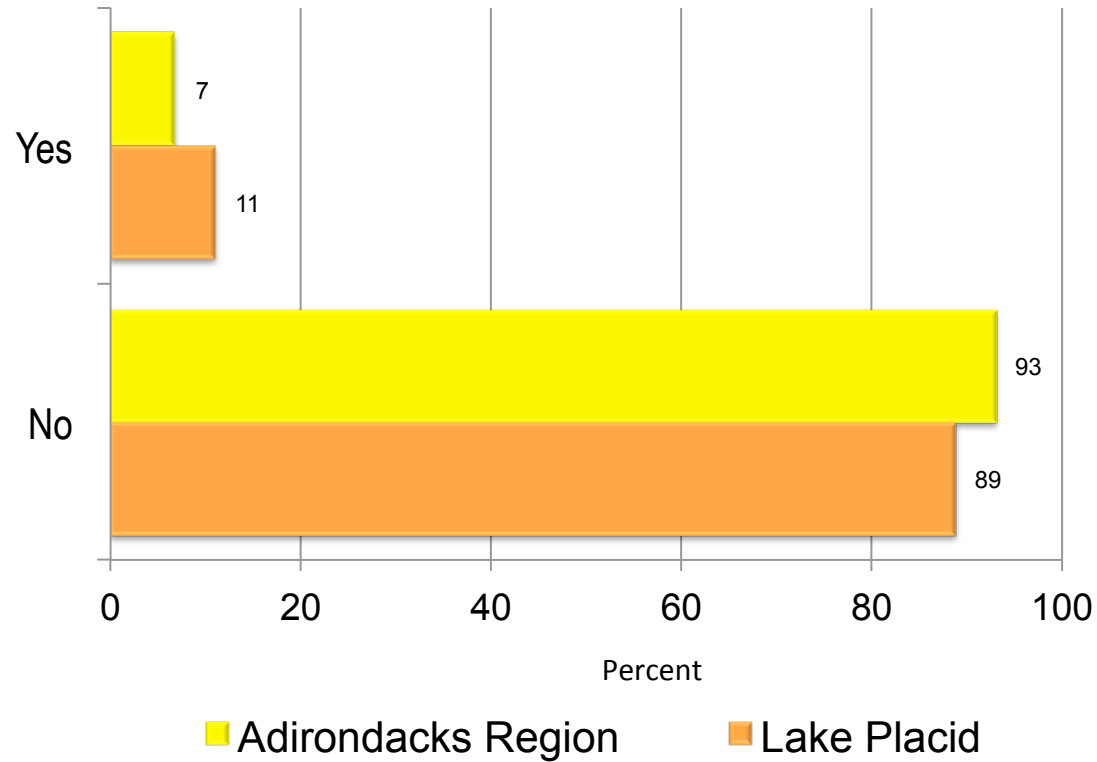
Base: Adult Day Trips



Hispanic Background



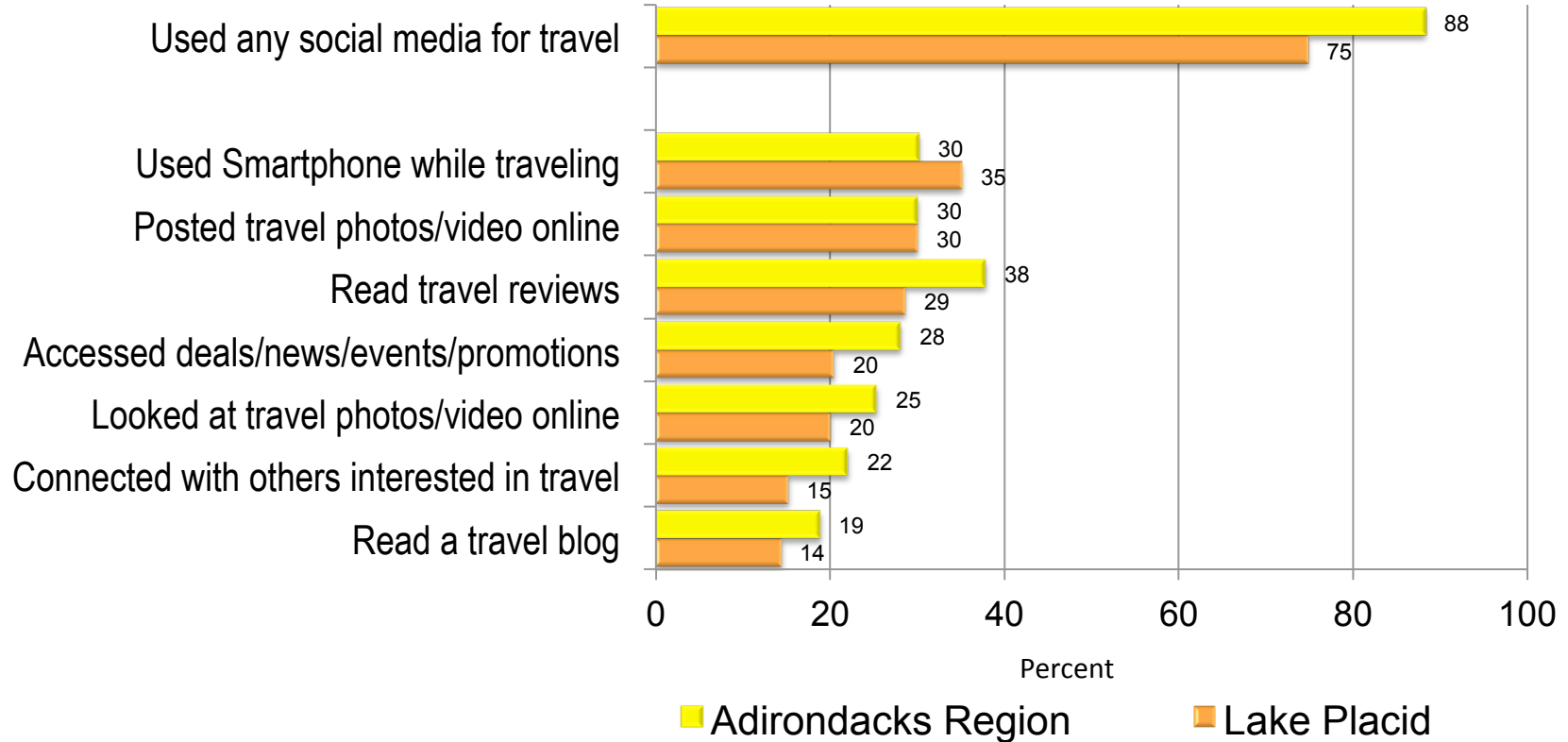
Base: Adult Day Trips



Use of Social Media for Travel



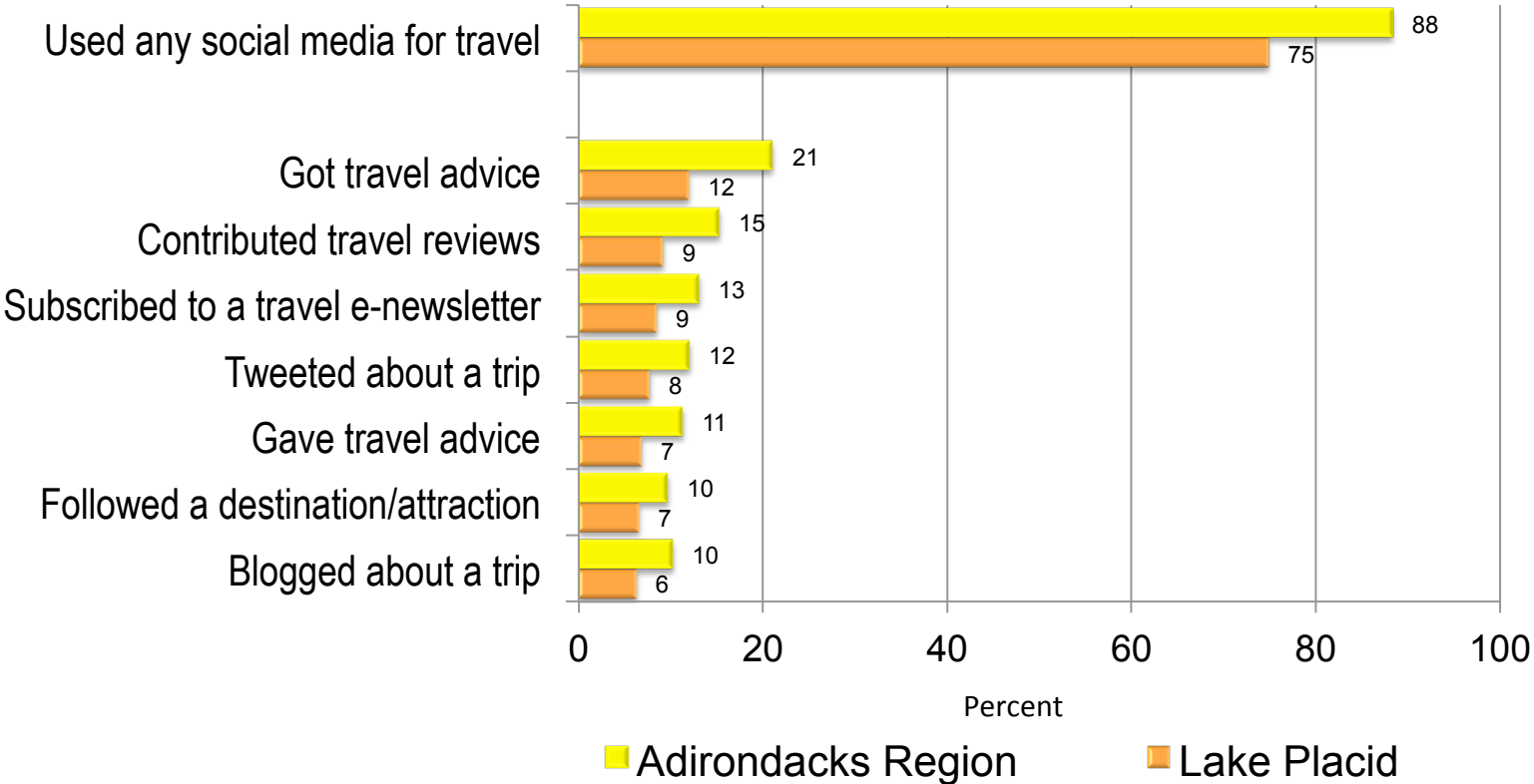
Base: Adult Day Trips



Use of Social Media for Travel (Cont'd)



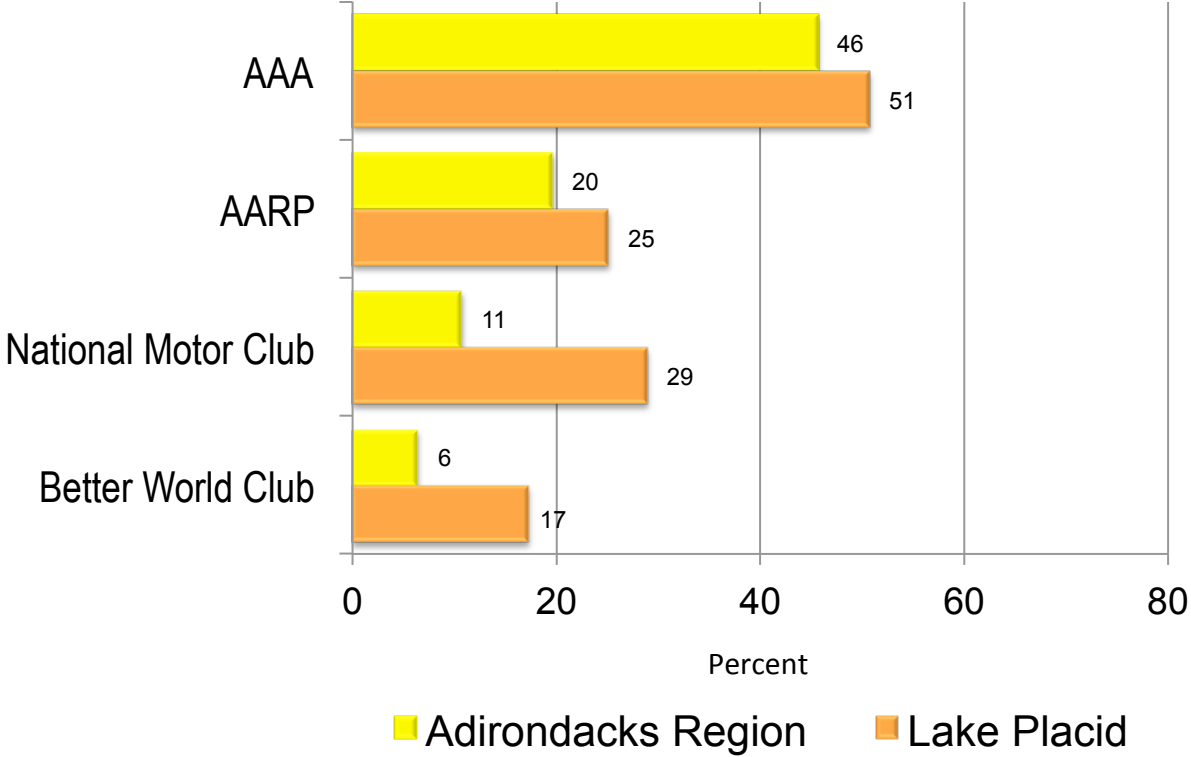
Base: Adult Day Trips



Club Membership



Base: Adult Day Trips





Appendix A: Key Terms Defined

Key Terms Defined



- ◉ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ◉ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.
- ◉ A **Person-Trip** is one trip taken by one visitor.
 - ◉ *Person-trips are the key unit of measure for this report.*

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - *Visiting friends/relatives*
 - *Touring through a region to experience its scenic beauty, history and culture*
 - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - *Special event, such as a fair, festival, or sports event*
 - *City trip*
 - *Cruise*
 - *Casino*
 - *Theme park*
 - *Resort (ocean beach, inland or mountain resort)*
 - *Skiing/snowboarding*
 - *Golf*
- **Business Trips:**
 - *Conference/convention*
 - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives