

**Analysis of 2020 Day Trip Travelers
and Short-Term Renters to the
Adirondack Region of Essex and
Hamilton Counties)**



ROOST

**PlaceMaking
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BACKGROUND

The Regional Office of Sustainable Tourism (ROOST) oversaw marketing tourism assets for Essex and Hamilton County and the Village of Tupper Lake in Franklin County of New York State in 2020. The agency commissioned a study to determine leisure traveler information at the county levels and to gauge key regional marketing program statistics. 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 2020 leisure travelers to Essex and Hamilton counties. Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from those who visited the region.

The number of potential visitors who inquired about travel to the region in 2020 and provided contact information (traceable leads) was 161,763. Traceable leads do not include the potentially much larger audience that could also be influenced by promotional material for the region suggesting that the leads represent a conservative number on which to base study results.

Three thousand five hundred and ninety-three (3,593) visitors responded that they visited the three-county region in 2020. This is approximately 30 percent less than the prior year response to the survey, which is not a surprise given the COVID-19 pandemic and restricted travel.

One component of the research was a cross-tabulation of two sub-groups of visitors within the survey group; this captures day-trip travelers and those who rented private homes (short-term renters) during their visits. Survey and project methodology, broader regional traveler data and marketing/return on investment (ROI) analysis are provided in a separate report. Analysis on the sub-groups of day visitors and short-term renters are provided here.

DAY TRIP VISITORS

Day trip visitors are those who responded in the survey that they traveled to the area for one day only, with zero overnights. A total of 1,255 responses from 2020 trips were received out of 3,593 total responses. This is 34% of respondents, a substantial increase from the 20% of visitors reporting day visits in the last several years of study data. COVID-19 precautions likely accounted for much of this growth in day travel.

The following summarizes variations of 2020 day trip visitors from the overall regional visitor population:

- Average day trip visitor party size is 5 persons, including 4 adults and 1 child. This is much higher than reported in previous years.
- Overall expenditures continue to be much lower among this group of travelers, although higher than in recent years of research. The total average reported party expenditure is \$372, compared to \$258 in 2019.
- Meal expenditures accounted for this expenditure increase among day visitors, with average party meal spending reported at over \$200 (an almost \$150 increase over prior year).
- Interest in outdoor activities reported by day visitors increased significantly from 50% in 2019 to 80% in this year's survey. The next most common attractions to visit: relaxing and dining, also increased substantially to 56% from 41% in year prior.
- Other attractions that showed major increases in expressed interest to visit were Olympic attractions (from 6% to 15%) and agritourism (from 4% to 7%).
- Among day visitors who responded that they were interested in outdoor activities, interest in hiking soared to 91% of respondents. Expressed interest in canoeing/kayaking also increased substantially from 16% in 2019 to 46% in 2020. Similarly, interest in cross country skiing/snow shoeing jumped from 6% to 20%, interest in mountain biking increased from 2% to 11% and in skiing/boarding from 6% to 16%.
- At 53 years, the mean age of daytrip visitors is slightly younger than in the last several years of data collection. It is, however, consistent with the full group of all

regional visitors.

SHORT-TERM RENTALS

The visitor survey asked respondents who traveled to the region for overnight stays in 2020 what was their primary lodging. This section is devoted to the results of those visitors who indicated that they stayed in a private home rental (through AirBnb, AdkByOwner, etc.), referred to here as a "short-term rental".

Over 1,000 (1,067) respondents in the region indicated that they stayed in a short-term rental. This was nearly double the number of respondents who indicated this type of accommodations for visits from 2019. The following is a summary of visitors who stayed in short-term rentals in comparison to overall regional visitor respondents.

- Average short-term renter traveler party size is 6.9 persons (5.3 adults and 1.6 children) versus 5 for all visitors to the region.
- Total expenditures reported among short-term renters were an average of \$3,498. This is substantially higher than the average regional visitor which also increased from 2020 (reported at \$1,667). However, the expenditures among short term renters rose even more than among other regional visitors.
- Lodging costs accounted for most of this reported expenditure gain (\$2,179 on average, up from \$1,157 in 2019). Meals (\$679) and shopping (\$342) expenditures also increased, while the other areas showed spending decreases.
- The reported average length of stay for short term renters doubled from prior year reporting to 10 days.
- Peak summer visitation (July/August) increased somewhat among this group (from 32% in 2019 to 37%), but visitation timing did not vary as much from "typical" seasonal spread as did among all regional visitors from 2020.
- Outdoor activities (91%), relaxing/dining (60%) and sightseeing (47%) continued to grow in reported interest to visit the area among short-term renters. Only outdoor activities showed the "double digit" level of increase that occurred in other categories among all regional visits, however.

- The mean age of short-term renters is slightly younger than the full regional group at 50 years (versus 53).

CONCLUSION

The survey data was cross-tabulated for the purposes of analyzing two sub-groups of visitor data. Both groups have yielded sufficient sample sizes (1,055 and 1,267) to provide good indications from which to draw conclusions. Both were a larger proportion of the sample this year, as well. Many of the differences among these sub-groups from the full regional sample are consistent within the three years that this data has been analyzed.

Day trip visitors are a large piece of the visiting fabric of the region and provide substantial economic impact, particularly with the assumed proximities to visit and ability to return more frequently. Day trip visitor presence grew during 2020, not a surprise due to pandemic travel limitations and public hesitation in traveling far from home. Day trip interests in outdoor activities overall, and especially in activities such as hiking, canoeing/kayaking, mountain biking and agri-tourism increased substantially. In the last several years of research, this sub-group's interest in such activities was far less.

Day trip visitor impacts are constrained by the short time spent in the area and spending patterns which are substantiated by this research. The large-reported gain in meal expenditures is an interesting finding. It will be noteworthy to see if these higher expenditure levels continue among day visitors in the future, and if they increase to other expenditures areas (such as attractions and events as those options expand).

Short-term renters represent a sizable and continually growing market within the region and nationwide. The growth trend of this accommodation type heightened markedly once more travel resumed in the area mid-year.

National data confirms that short-term rentals have rebounded faster than hotels¹. Nationwide, length of stays increased by approximately 60% at short-term rentals. According to this survey, short-term rental stays in the Adirondack region increased much more than that, a positive finding which will be investigated in future.

The larger visitor groups who are represented in this year's data, and in particular among short-term renters, are assumed to include many "COVID pods"- the family and friend groups who traveled together and limited exposure to others during travel and in other social/life functions.² Another finding which remains to be tracked in future years is if these larger groups continue to travel together, or if patterns shift back to more traditional smaller visitor party (immediate family) size.

The data gathered from this survey shows continued highly positive indications from the short-term renter group- including longer visits, larger traveler parties and high expenditure levels across all categories. Short-term renter seasonality of visits also varied less than the full group of regional visitors, which in 2020 were highly concentrated in peak summer months. It is important to the region that private home rentals average higher expenditure levels expand well beyond lodging costs into also shopping and meals. As noted within the day visitor data summary, it will be interesting to note if greater spending also expands into other categories as those options (attractions, events, etc.) re-open in 2021.

The short-term rental market in the region is concentrated particularly in certain areas, although offerings have grown overall. ROOST was a regional leader in instituting occupancy tax collection for these properties years ago. With higher intensity of short-term rentals and longer stays, the demand for such properties is likely to continue.

Sources

1. USA Today: "Why are Vacation Rentals more Popular than Hotels during COVID?". [Airbnb, Vrbo more popular than hotels during COVID-19 pandemic \(usatoday.com\)](https://www.usatoday.com/story/travel/hotels/2020/08/26/airbnb-vrbo-more-popular-than-hotels-during-covid-19-pandemic/5342230002). August 26, 2020.
2. Air DNA. "COVID-19 Short Term Rental Data". [www.Airdna.co/covid-19-data-center](https://www.airdna.co/covid-19-data-center) February 2021