

# LEISURE TRAVEL STUDY

## 2020 TRAVELER PROFILE

*Hamilton County, New York*

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*Regional Office of Sustainable Tourism (ROOST)*



*photo credit: ROOST*

**PlaceMaking**  
**Growing North Country Communities and Economies**

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## **EXECUTIVE SUMMARY**

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### **Introduction**

This study was commissioned for the fifth year to measure leisure traveler information and key marketing program statistics for the Regional Office of Sustainable Tourism (ROOST) in Hamilton County, New York. ROOST is responsible for marketing Hamilton County's tourism assets. The research was targeted for the leisure travel market.

Certainly, this year provided an unprecedented time in modern history because of the COVID-19 pandemic. As such the researchers and ROOST recognize the unusual time of visitation and social trends during 2020 and a caution against direct comparison to other years of research. As the pandemic caused near shutdowns of most industries by late first quarter; most of the measured year show these impacts.

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 2020 leisure travelers to Hamilton County. Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from travelers primarily to Hamilton County. The end-product of this research includes detailed traveler information, estimated traveler expenditures and analysis.

PlaceMaking also conducted similar research for neighboring Essex County and for the cumulative two-county region. The number of potential travelers who inquired about travel to the two-county region in 2020 and provided contact information (traceable leads) was 6,326. ROI data is compiled at the regional level in a separate report. A regional summary and ROI analysis is provided under separate cover.

### **Survey Respondent Data Summary**

Highlights of 2020 visitation to the region from among all survey respondents included:

#### Demographics and Visit Information

- Average traveler party age of respondents was 55 years old, slightly lower than the five-year average of 56 years.

- Respondents included 54% female and 46% males., a closer to equal gender proportion than the last several years of data collection.
- 94% of visitor respondents were of white ethnicity; with 0.7% Asian, 0.5% each Hispanic and African American. 3% of visitors reported mixed race.
- The average reported total traveler party size climbed greatly in 2020, to 4 adults and 1.2 child. This is substantially larger than the average of the last five years (4 total).
- Visitation by respondents from New York State jumped to 89% of all reported visitors.
- Of New York State visitors, a majority of respondents (54%) reported coming from central or western NY State. Over one-quarter (28%) reported coming from the Capital District or North Country. Northeastern state visitors outside of NYS dropped slightly to 9% of respondents.
- Not surprisingly due to border closing and travel restrictions, reported visitation from other U.S regions than the northeast and Canadian visitors dropped substantially (nearly zero Canadian visitors and only 2% from other regions).
- Stay length reported by 2020 travelers also increased greatly from prior years. The average length of stay doubled from average stay length of the past five years to 7 nights.
- The times that travelers noted visiting Hamilton County in 2020 showed very strong summer peak visitation, modifying a slow trend toward increased shoulder season visitation of recent years. July/August visitation climbed to nearly one-half of annual reported visitation (43%). September/October visitation dropped to 19% and November/December (2%) and January/February (9%) visitation also dropped. March/April reported visitation stayed nearly consistent at 5%. May/June (15%) visitation increased slightly to 22%.
- Hotels/motels (28%) and camping/RV use (28%) remained the most reported lodging choice among 2020 traveler respondents by a high margin. A slightly higher proportion of private home rentals occurred in 2020 (14%) and a slightly lower proportion of staying with family/friends (12%). Second home use remained consistent at 14%.

## Interests

- The long time most reported attraction to visit the area, for outdoor activities, jumped considerably this year, with 87% of respondents selecting this attraction (69% from 2019 visitors).
- The second most reported attraction to visit the area for many years, "Relaxing, dining and shopping" also gained this year with 57% of respondents selecting this attraction. Both top two attractions had showed "double digit" growth in comparison to prior year.
- Sightseeing (49%) and Olympic attractions (29%) also demonstrated gain as well.
- Visiting with family and friends stayed consistent at 28%. A big jump in interest in Agri-tourism was reported by 2020 visitors (from 5% in 2019 to 11%).
- A remarkable 93% of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity they sought. This also represents a double-digit gain from prior recent years' levels of interest. Reported interest in canoeing or kayaking also nearly doubled from prior years with well over half (69%) of respondents to this question showing interest in that activity.
- Cross country skiing (15%), skiing/boarding (12%) and snowmobiling (11%) all showed substantial increased reported in interest as outdoor activities as well, by 2020 visitors.
- A more detailed question regarding hiking preferences indicated that the most popular types of hiking are day hikes (69%), followed by leisure/hard surface hikes (55%) and family hikes (31%). Adirondack 46er (8%), Saranac 6er (5%) and Tupper Triad hikes (4%) also showed increased respondent interest. This is indicative of the nearly explosive interest in hiking seen during the 2020 year and evidenced by extremely busy trailheads.

## Traveler Spending and Conversion

- The average daily traveler party spending in 2020 dropped to \$167 daily, from \$306 per day in the prior year. However, this does not indicate lower overall

spending as length of stays doubled. The total estimated average trip expenditure for 2020 visitors is \$1,167, growing over 20% from the prior year.

- Reported spending on lodging also nearly doubled from 2019 to 2020 for a total of \$527. This is correlated to the greater lengths of stay.
- Average meals (\$312) and shopping (\$184) also showed substantial increases from recent years of data. All other reported expenditures showed lower average spending amounts, in large part due to pandemic closures and health concerns.
- 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 81%. This shows a trend of steady increases in this measurement of effectiveness in marketing to the region.

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## **METHODOLOGY**

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The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a leisure visitor survey for the ninth year. The study has employed similar methodology with comparable results for seventeen 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. As ROOST represents the tourism marketing interest for numerous Adirondack communities, the survey of 2020 travelers also included adjacent Hamilton County. Traveler studies for the two-county region and for Hamilton County individually are provided under separate cover.

Survey results are parsed by where the visitor indicated spending the most time in order to achieve individual county level results. 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.

The survey was distributed electronically by ROOST to a sampling of its electronic database of visitors or parties inquiring about visitation to Hamilton County during 2020. The survey was sent in early January and analyzed in February/March 2021.

The visitors who were invited to participate in the survey represent traceable direct inquiries generated by the office's marketing efforts which resulted in individuals providing their contact information. This included respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter and Facebook), through magazine reader service cards, and in-person visits. This study does not take into consideration the potentially large group of individuals that view travel materials and are then subsequently influenced to travel to the area, but do not provide traceable information.

The survey instrument was predicated on research for surveys with a similar purpose and was further refined based on the experience of the tourism professionals involved in the research. The on-line 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.

A total of 13,434 invitations were sent by ROOST successfully through electronic mail. Of this group 3,521 responses were received for a 26% response rate. An additional 467 responses were received by Facebook respondents from 35,000 who viewed the request for the survey. This 1.3% response is much less significant of course, but given the overall high level of response, researchers included the social media response to the aggregate group.

Of the approximately 3,500 responses, 915 responses were specific to Hamilton County, selecting a Hamilton County location as their primary destination. This is a drop in response from the prior several years but it not a surprise given the pandemic-result of lower travel demand during the 2020 year.

The project team for this research is consistent with previous years of study, including project manager Victoria Zinser Duley- AICP, Principal with PlaceMaking, John Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management and Lisa Cyphers- Statistician.

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## **CONCLUSION**

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The COVID-19 pandemic had drastic results on the tourism industry as it did across most industries across the globe. ROOST played a key leading role in promoting more localized tourism with safety policies such as masking even on its outdoor main streets.

ROOST worked with its many tourism assets and hospitality partners to determine how many could safely stay open or to re-open to serve the reduced tourism population that was visiting the region.

Occupancies over the year were indeed down, and while the county does not have access to proprietary travel data, it appears that regional declines were far less than the national average of 45-50% in most markets. In many cases, accommodations were able to charge higher rates to help keep workforce and to support the modifications in facilities and deep cleaning to meet COVID-19 challenges.

The impacts of the COVID19 pandemic are shown in 2020 visitor research. One of these are the home area of visitors, almost entirely coming from NY State. This is due to travel restrictions which limited most New Yorkers to only tri-state travel for most of the year. The Canadian border was closed from April for the rest of the year, so few Canadian visitors could reach the area. Some out-of-state visitation continued but was limited largely to neighboring Connecticut and New Jersey as NY Department of Health widely-permitted this travel.

Much longer average stay durations were another pandemic reported occurrence. During the past 6 years of this research, the length of average visitor stays had declined, so this shift is particularly pronounced. With many industries operating remotely only, or in hybrid-form, many visitors could work remotely and stay with their families out of town. Others had their work entirely shut down or closed and could do the same. The impact of the Payroll Protection Program which allowed companies to keep employees on payroll while in shut-down permitted many to work remotely or to maintain income during employment shut down.

Less shift in type of accommodations was noted in Hamilton County than in other areas within the region or nationwide, where short-term rental use increased substantially in the second half of the year. Another pronounced change from prior years' research is the increase in average party size. Researchers and hospitality experts believe that this is at least in part due to families or friend groups participating in "COVID-pods". This has two or more family or friend groups traveling or spending close time together during the pandemic, with limited contact to others to prevent risk, but allowing for socializing or group work/education.

Average reported lodging and meal expenditures increased to an all-time high through this research. Much of this may be tied to length of stay. It remains to be seen if these expenditure levels remain high in future years.

The U.S. Travel Association<sup>3</sup> calculated domestic travel reductions nationwide for 2020 from 2019. An estimated 36 percent decrease in travel expenditures were noted nationwide. The leisure market was estimated to have dropped just over 30% while the business travel market dropped a staggering 70%. International travel dropped even further at 76%.

The research team continues to discuss the broader impact of regional tourism on Hamilton County visitor assets and areas by which to expand traveler data collection accordingly. As the state and rest of the country and world access COVID-19 vaccinations and the travel industry begins to recover, it is anticipated that a new market may have found the region. It will be interesting to see if the patterns of greater expenditures and longer stays will remain. If some of these gains, as well as visitors returning who were not able to get to the region during the height of the pandemic, it could provide years of positive momentum for Hamilton County and the greater region.

The ability of the region to continue strong visitation during a pandemic is notable, as are the longer stays and resulting increased expenditures. This is encouraging in terms of marketing impacts and future growth. These data can continue to be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency.

Table 1 below summarizes key Hamilton County traveler data ascertained by this survey and a five-year average to begin to benchmark data points. Given the global anomalies in all activities of persons during the COVID-19 pandemic in 2020, it remains to be reminded that direct comparisons of the results of this year's data to other years should be done cautiously.



**TABLE 1. KEY FACTS DERIVED FROM SURVEY DATA-  
5-YEAR COMPARISON**

	<b>5 Year Average</b>	<b>2020</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>	<b>2016</b>
Number of Completed Survey Responses	1,368	915	942	1,333	1,466	2,130
Average Income of Respondents	NA	*	\$89,747	\$92,830	\$87,662	\$91,940
Mean Age of Respondents	56	55	57	58	56	53
Respondent Gender	57% Female 43% Male	59% Female 40% Male **	54% Female 46% Male	59% Female 41% Male	54% Female 46% Male	NA
Average Night Stays/ Party	4 Nights	7 Nights	3.2 Nights	3 Nights	3 Nights	4.1 Nights
Average Party Size	4 Persons	5.2 Persons	3.4 Persons	3.9 Persons	3.9 Persons	3.8 Persons
Conversion Factor Rate	79%	81%	77%	76%	78%	82%
Average Daily Expenditure per Party	\$277	\$167	\$306	\$312	\$289	\$309
Average Total Expenditure per Party per Trip	\$969	\$1,167	\$963	\$934	\$855	\$927

*\*only median income (\$100,000) tabulated this year \*\*1% other*

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## **SOURCES CITED**

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1. Smith Travel Research, Inc. "Trend Report: Essex County, NY". February 2020.
2. U.S. Department of Commerce, International Trade Administration- National Travel and Tourism Office, "Visitor Spending and Volume Fact Sheets" 2019.