

2020 Leisure Travel Study

A scenic landscape photograph showing two hikers, a woman and a man, walking across a rocky, forested ridge. The woman is in the foreground, wearing a grey long-sleeved shirt and dark pants, with a backpack and a water bottle. She is reaching out with her right hand. The man is slightly behind her, wearing a brown jacket and green pants, also with a backpack. They are both looking down at the ground. The background features a large, calm lake surrounded by dense forests of trees with vibrant autumn foliage in shades of green, yellow, orange, and red. In the distance, rolling mountains are visible under a clear sky.

Day Tripper Visitor Focus

June 2021

ROOST

Project Background & Methodology

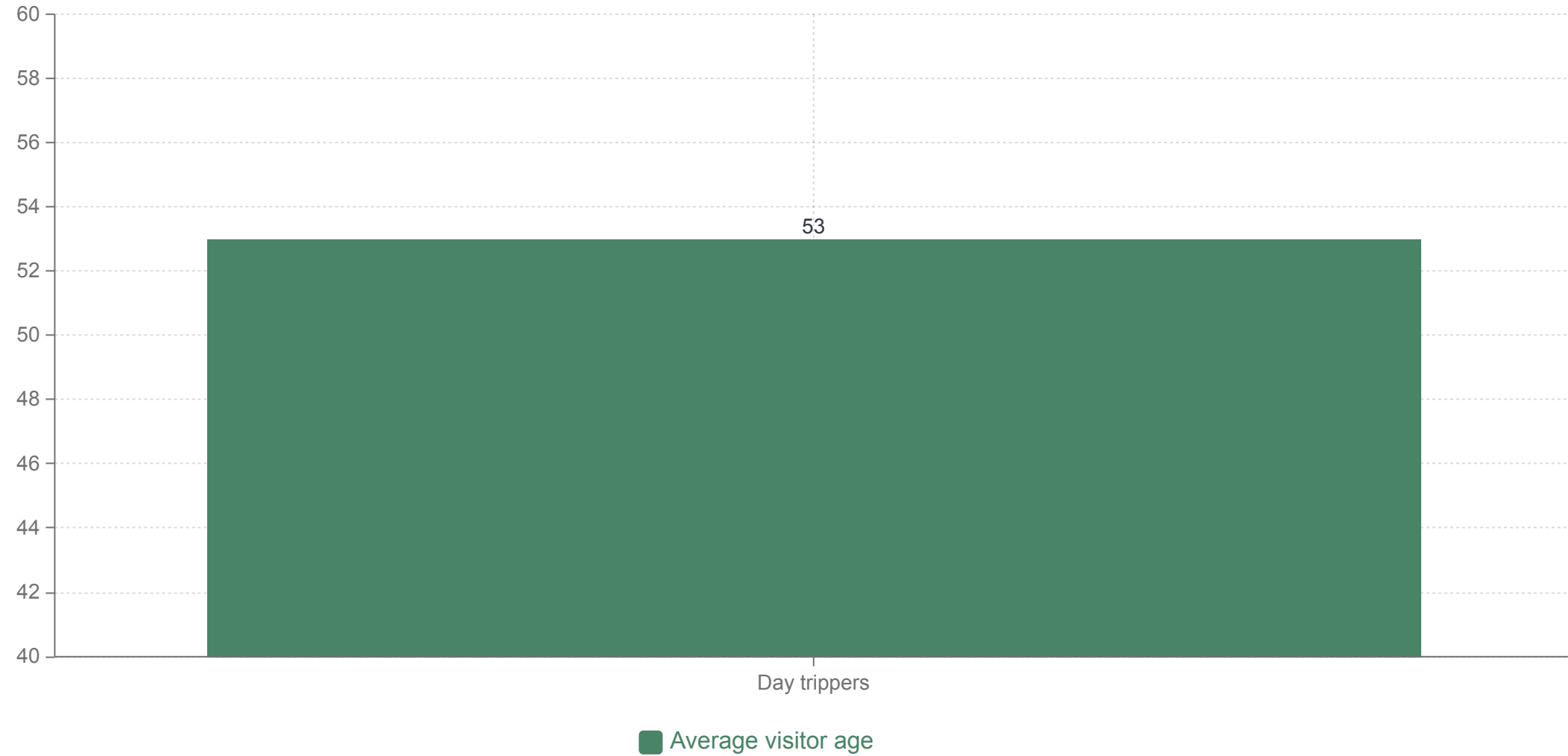
- ROOST manages the marketing tourism assets for the Adirondack Region of Essex and Hamilton counties including Tupper Lake, Saranac Lake, Lake Placid.
- The agency commissioned a study, as it has for the past five years, to determine leisure traveler information at the county levels and to gauge key regional marketing program statistics.
- In January 2020 ROOST sent an invitation to a representative sample of its travelers to Essex and Hamilton counties. The end product of the research includes detailed traveler information, estimated traveler expenditures and associated analysis.

Project Background & Methodology

- Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from visitors to the region.
- Over 13,000 invitations were sent by ROOST to a sample of those who inquired about 2020 travel and over 3,500 responses were received, which comprise the data collection for this analysis.
- Survey data this year provide interesting variations in an extremely difficult travel year due to the pandemic; overall the region fared much better than most national travel destinations.

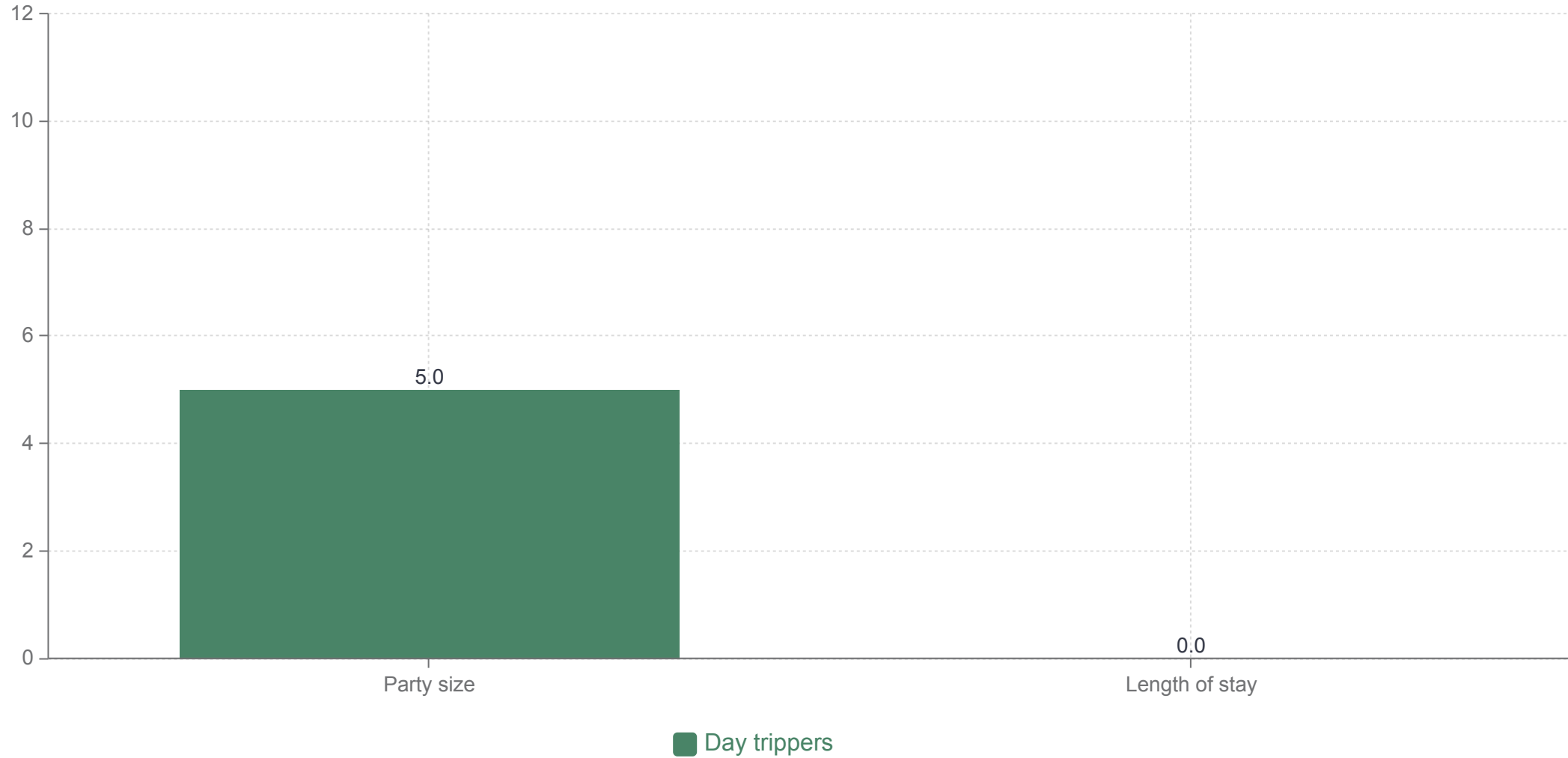
Average Age

Day trippers



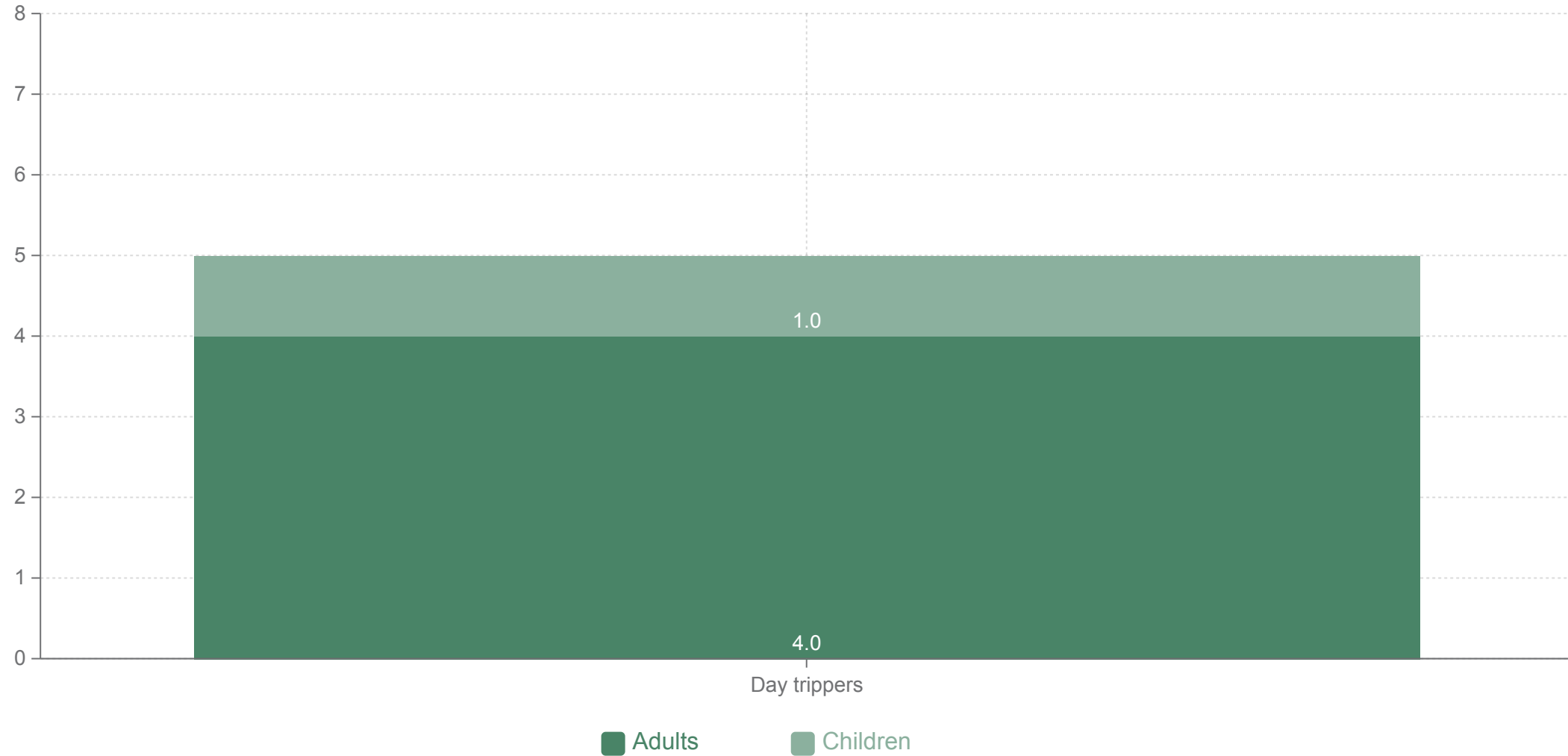
Party Size / Length of Stay

Day trippers



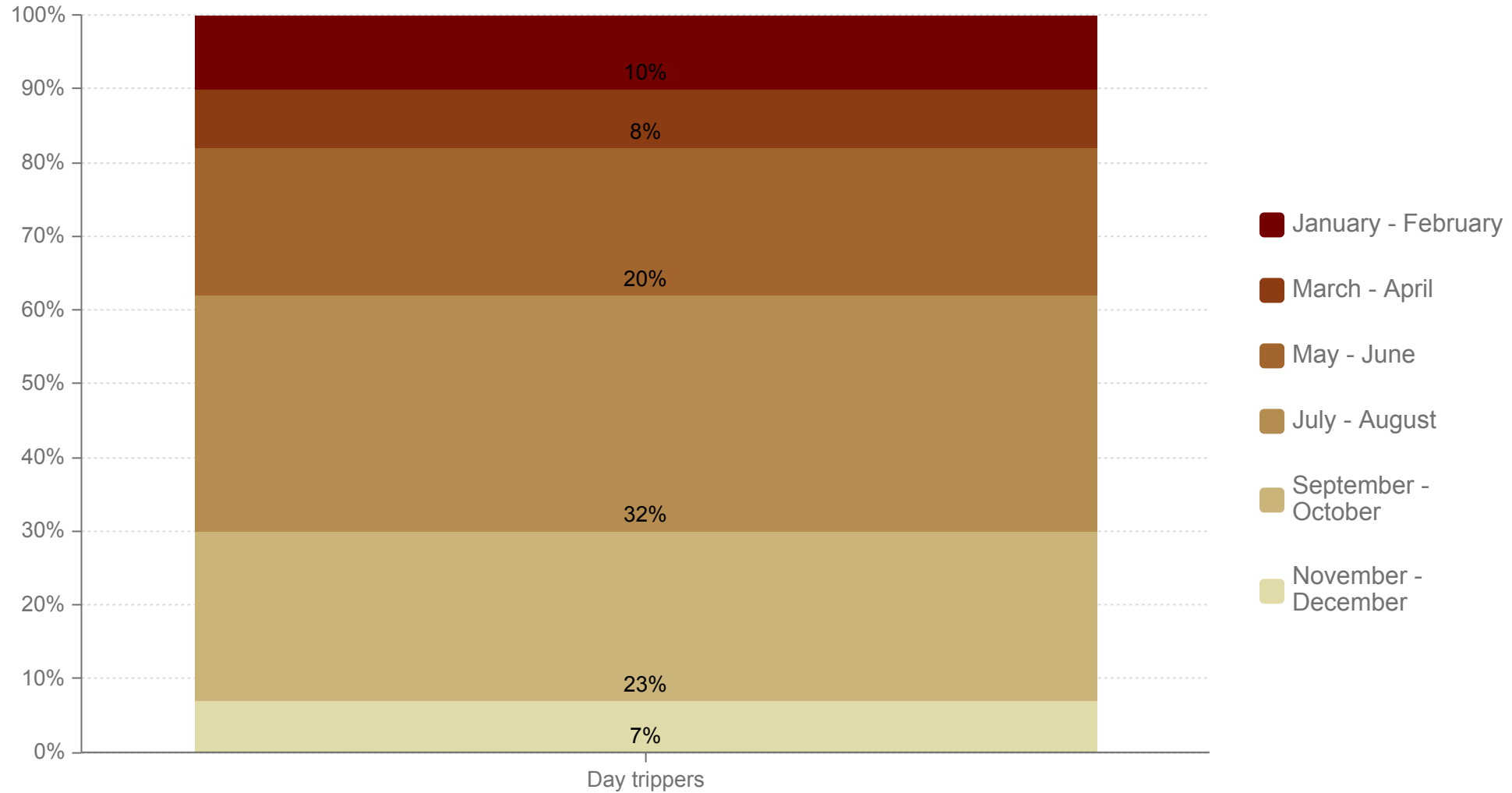
Party Composition

Day trippers



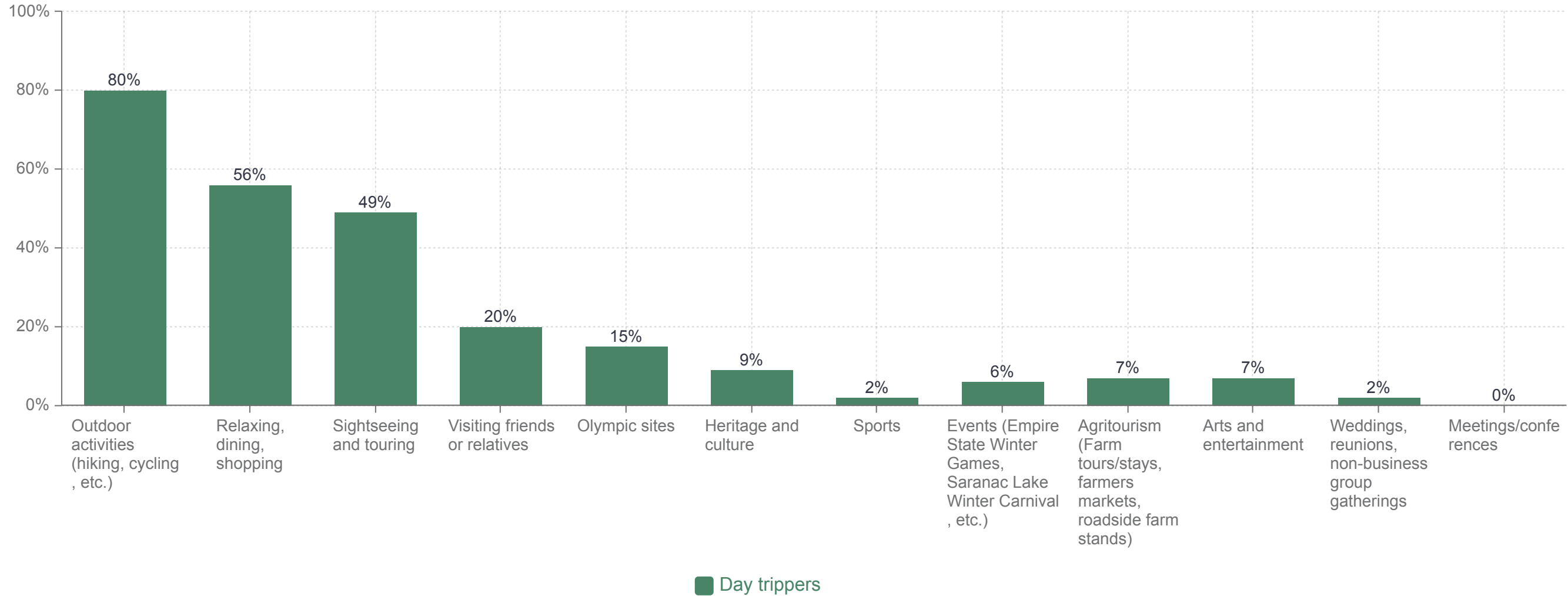
Time of Year Visited

Day trippers



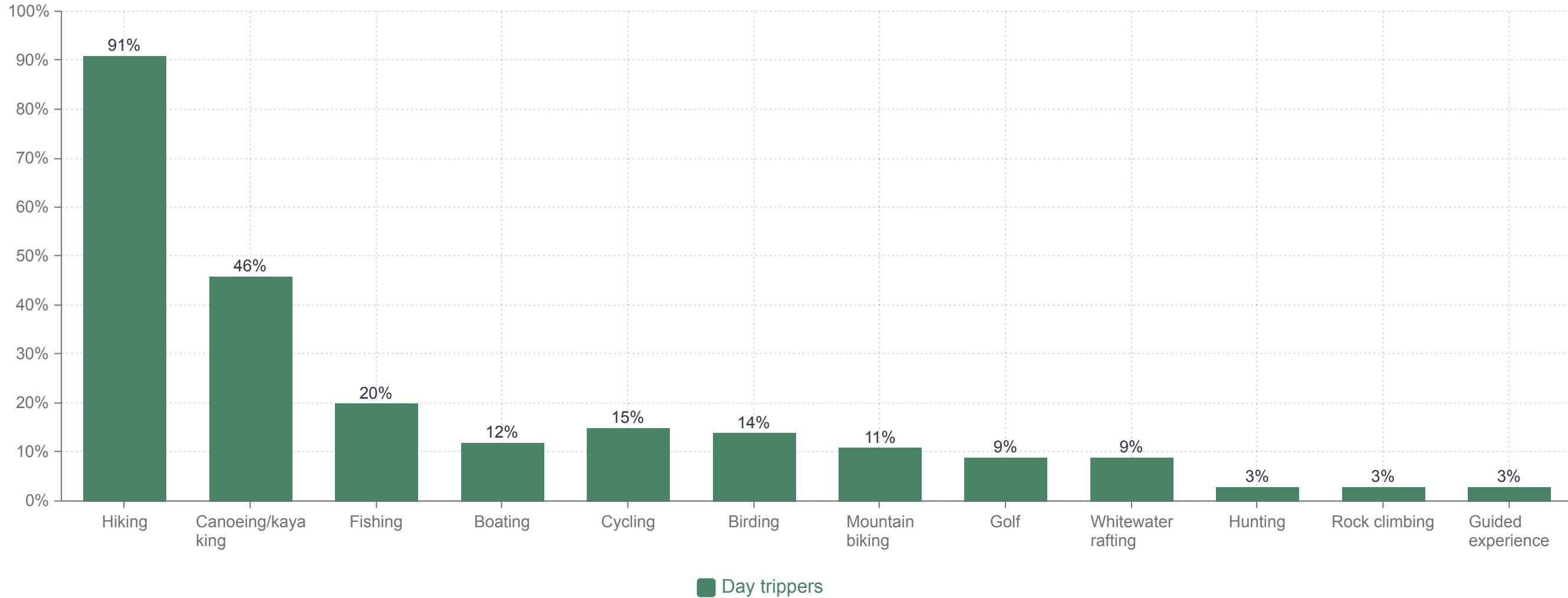
Key Attractions

Day trippers



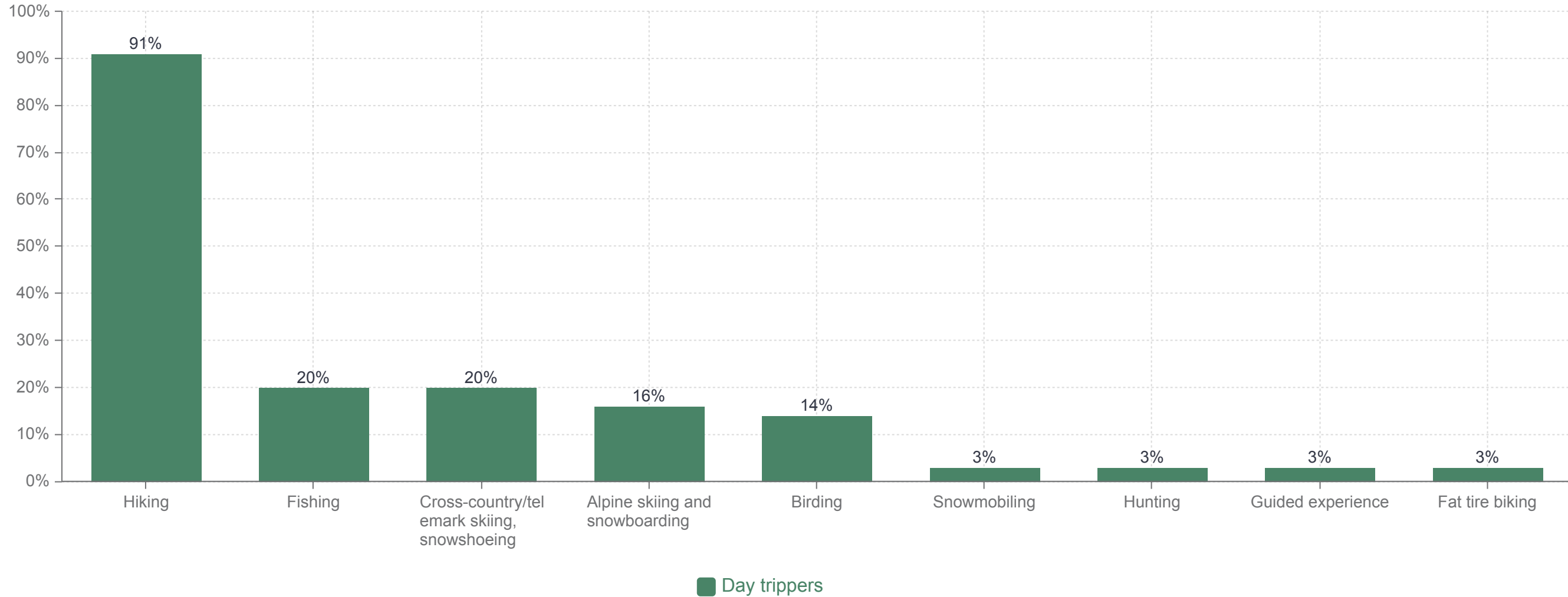
Outdoor Spring/Summer Activities

Day trippers



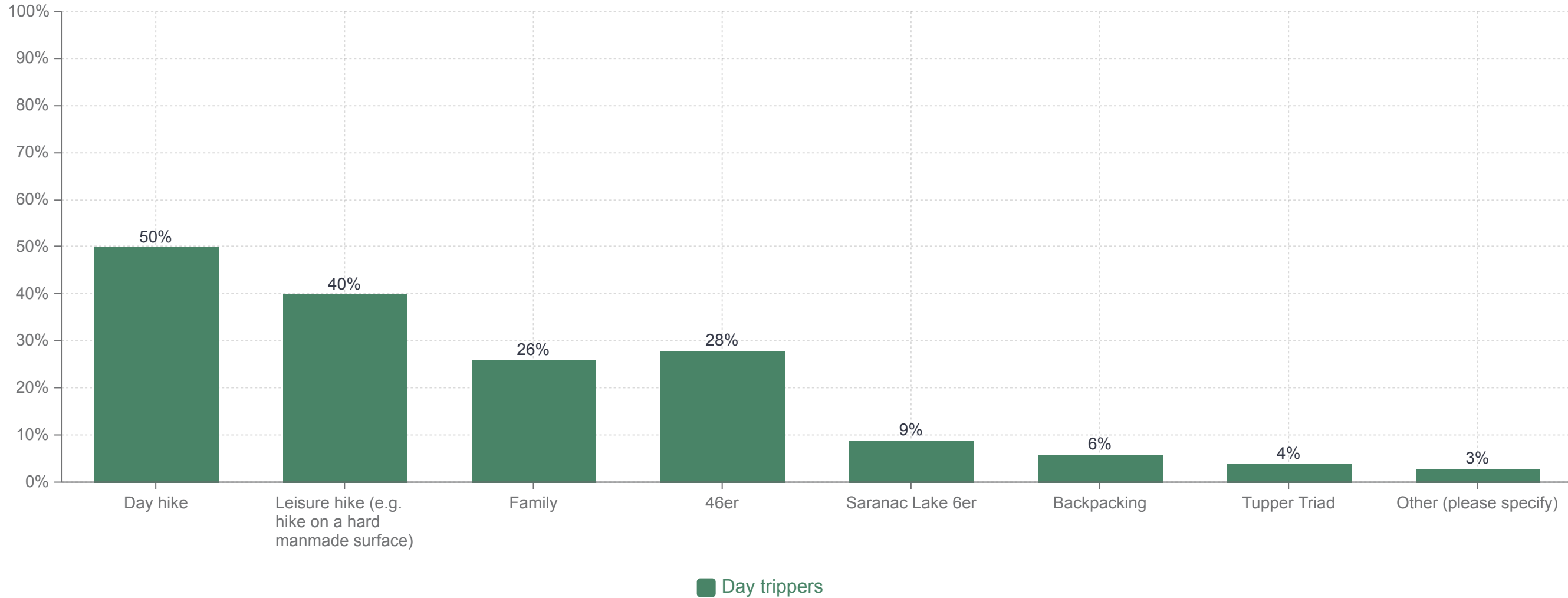
Outdoor Fall/Winter Activities

Day trippers



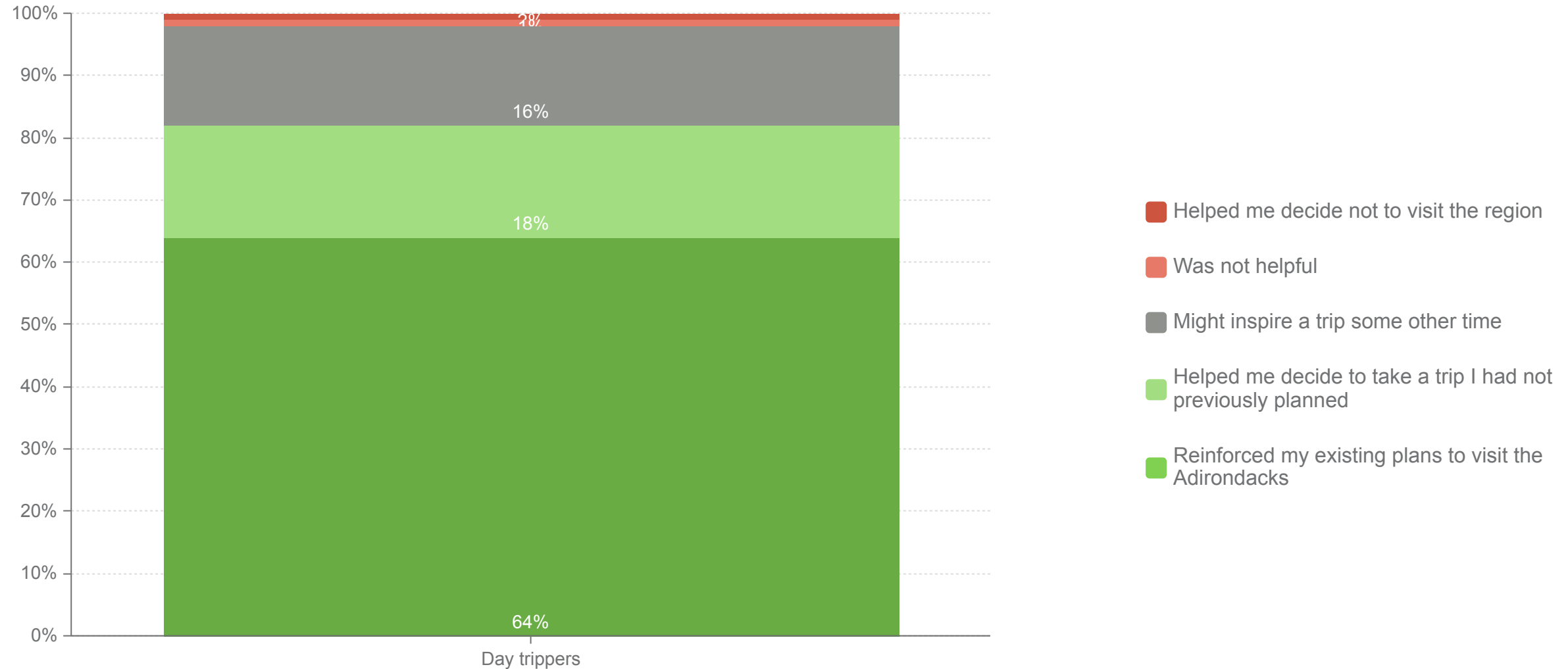
Hiking Breakdown

Day trippers



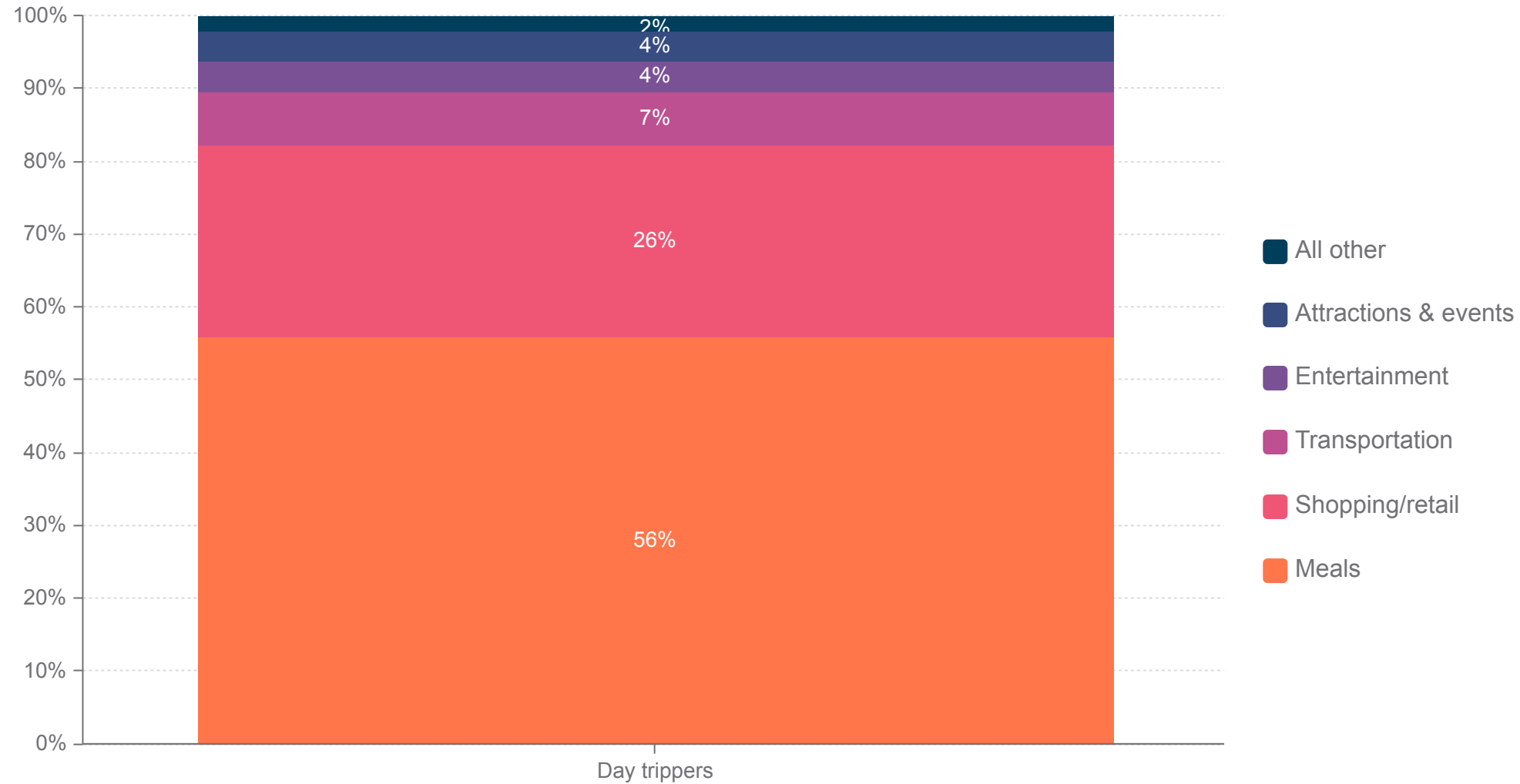
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers



Total Expenditure Allocation by Category

Day trippers



Mean Party Expenditures

Day trippers

	Day trippers
Lodging	\$0
Meals	\$208
Shopping/retail	\$98
Attractions & events	\$27
Transportation	\$16
Entertainment	\$15
All other	\$8
Average total expenditure	\$372

Day Tripper Visitor Profile



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Visitor Profile

Day trippers

- 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.

Visitor Profile

Day trippers

- 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.

Regional Visitor Impacts



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Regional Visitor Impacts

All travelers

- Average traveler party age of respondents was 53 years old, slightly younger than the five-year average and in prior year.
- Average reported total traveler party size was 4 adults and 1 child, for a total of 5 persons. This showed a near doubling of the adult party size from prior year (2.7).
- Visitation by respondents from New York State jumped to greater than three out of four of all reported visitors (78%).
- Central/Western New York visitors comprised the greatest group of these at 37%. Approximately one-third (34%) of these NY State visitors came from the most nearby region, the Capitol District and north. Northeastern state visitors outside of NYS dropped slightly to 16% of respondents.

Regional Visitor Impacts

All travelers

- Not surprisingly as a result of the border closing in spring 2020, Canadian visitors dropped to only 2% of respondents (from 8%). Similarly, out of state visitation from those outside the Northeast also dropped substantially to only 5% total.
- Stay length reported by 2020 travelers increased greatly from prior years. The average length of stay roughly doubled from average stay length of the past five years to 6.7 nights. Researchers believe this is also highly impacted by the pandemic.
- Hotels/motels remained the most reported lodging choice among 2020 traveler respondents by a high margin (40%).

Regional Visitor Impacts

All travelers

- Short-term rentals grew substantially in reported use, tying in 2020 with camping/RVs as the second most common lodging choice used by 17% of respondents. Second home use grew slightly to 13% of responses. Staying with family as a lodging choice dropped slightly from the prior year to 11%.
- The two most-commonly reported draws to visit the area had “double digit” growth in comparison to prior years. Outdoor activities were the largest draw to the area with 85% of respondents selecting this attraction. Relaxing, dining and shopping was the second most frequently reported draw to visit the region at 61%. It is notable that these three areas, historically the most common responses, grew so markedly during 2020

Regional Visitor Impacts

All travelers

- A remarkable 90% 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 over half (56%) of respondents to this question showing interest in that activity.
- Fishing (24%) and boating (23%) remained the next most-commonly reported outdoor activities of interest, both increasing somewhat from prior year response.
- The most popular types of hiking continue to be day hikes, leisure and family hikes. All types of hikes, however, indicated greater interest. This is indicative of the explosion of the already-growing hiking traffic in the Adirondacks during 2020.

Regional Visitor Impacts

All travelers

- Reported interest in cross-country skiing more than doubled from prior recent years surveying to nearly one-quarter (20%) of respondents indicated interest in this outdoor activity. Skiing/boarding also grew substantially in reported interest (17% of respondents). Mountain biking (12%) and snowmobiling (7%) also doubled in reported interest in comparison to prior years. Interest in birding and golf also grew during this year.
- 95% of visitor respondents were of white ethnicity; with just under 1% each reporting Native American, Hispanic, Asian ethnicity and 1.5% each mixed race or African American.
- Sightseeing (48%), Visiting friends (28%), Olympic sites (25%) were the next most reported draws. Olympic site visitation interest doubled from the prior year.

Regional Visitor Impacts

All travelers

- The average daily traveler party spending in 2020 was estimated at \$249 per day. While this represents a 34% drop in daily spending from prior recent years, it is not indicative of overall lower spending because of longer stays.
- The total estimated trip expenditure was \$1,667, which represents a nearly 30% increase in average overall spending per visitor group. Visitor spending has been increasing for the past five years and this is an even greater jump.
- Reported spending on lodging (\$813) nearly doubled from 2019 to 2020. This is correlated to the greater average lengths of stay.

Regional Visitor Impacts

All travelers

- Average meals (\$414) and shopping (\$251) also showed substantial increases from recent years of data. All other reported expenditures showed lower average spending amounts, presumably in large part due to pandemic closures and health concerns.
- 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%, a slight increase over the prior year.
- Over 168,000 individuals contacted ROOST via its various outlets for travel information about the region in 2020. This represents an approximately 40 percent decrease in contacts from the prior year and is well below the five-year average; none of which is a surprise in an unprecedented pandemic year.

Regional ROI Study



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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:

$$\begin{array}{ll} 168,089 & \text{(number of direct, traceable inquiries)} \\ \times 82\% & \text{(gross conversion factor)} \\ \times \$283 & \text{(mean traveler party expenditure per day)} \\ \times 6.7 & \text{(mean length of stay in nights)} \end{array}$$

- Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2020 is **\$261,345,113**.

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:

$$\begin{array}{rcl} \$261,345,113 & \text{(total estimated traveler revenue)} & \\ \div & \$3,266,422 & \text{(total ROOST marketing expenditures)} \end{array}$$

- This produces a conservatively-estimated ROI of **70:1** in leisure traveler-related revenue for every marketing dollar expended.