

2020 Leisure Travel Study

Hamilton County Visitor Focus

June 2021

ROOST

Project Background & Methodology

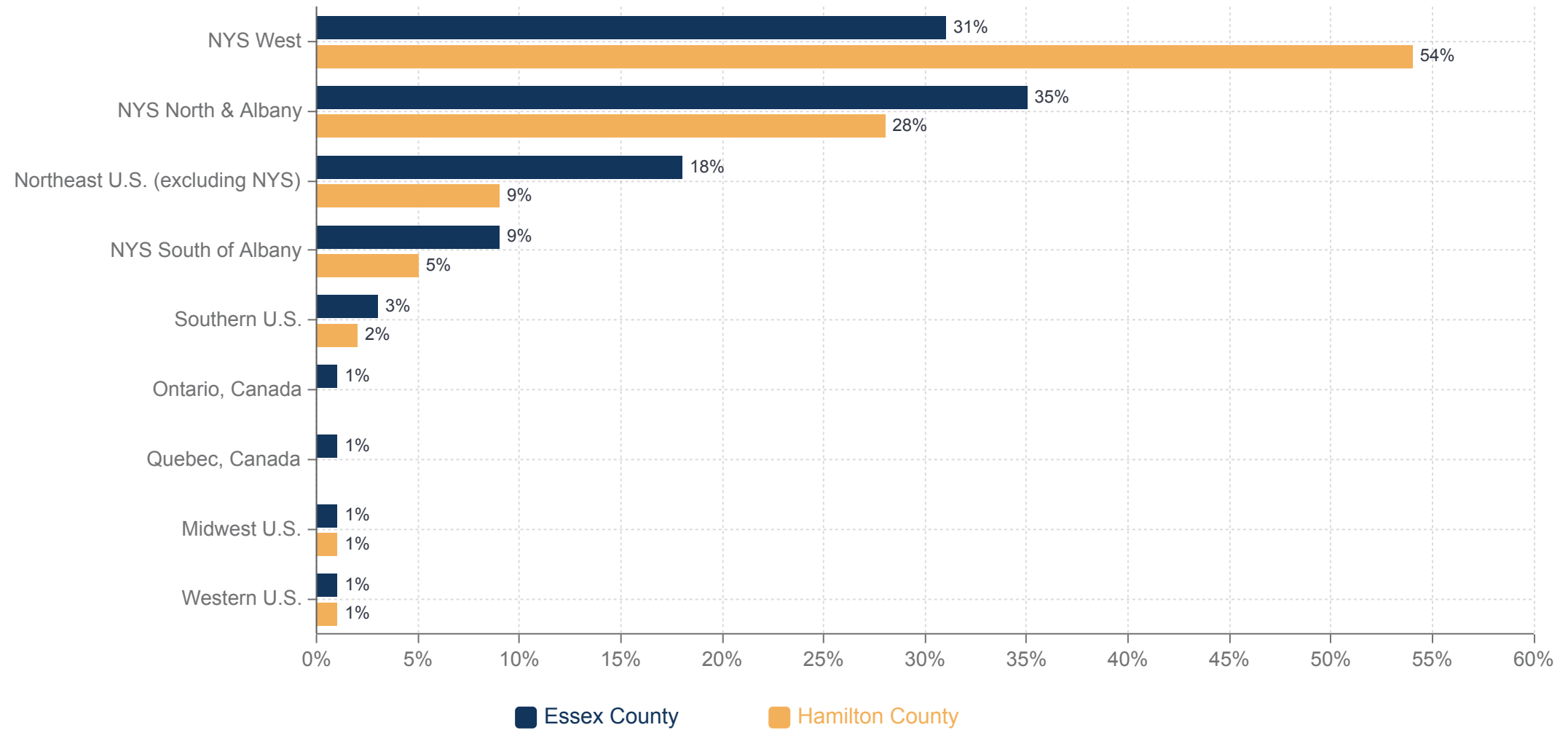
- ROOST manages the marketing tourism assets for the Adirondack Region of Essex and Hamilton counties including Tupper Lake, Saranac Lake, Lake Placid.
- The agency commissioned a study, as it has for the past five years, to determine leisure traveler information at the county levels and to gauge key 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.

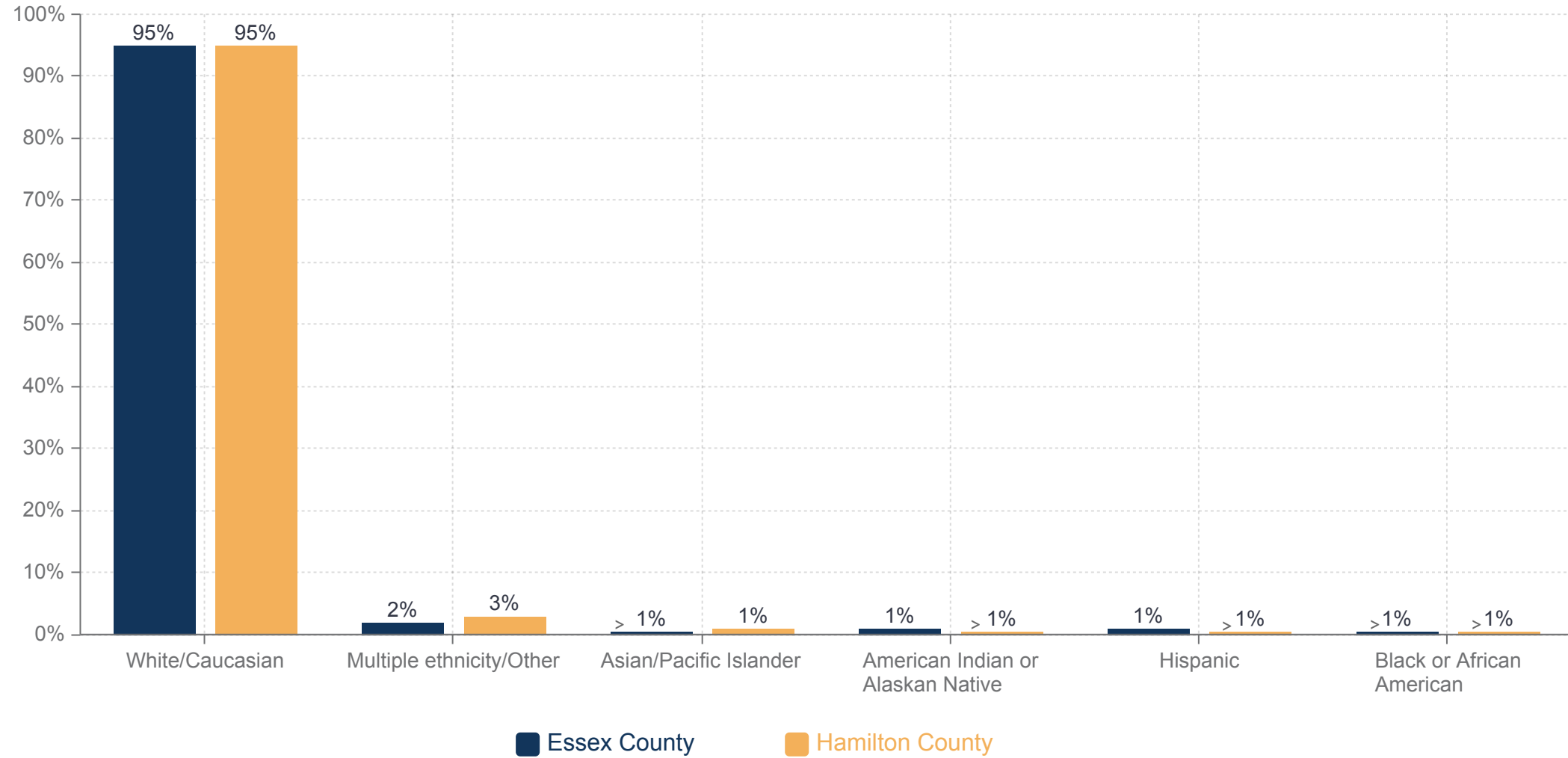
Area of Residence

All travelers



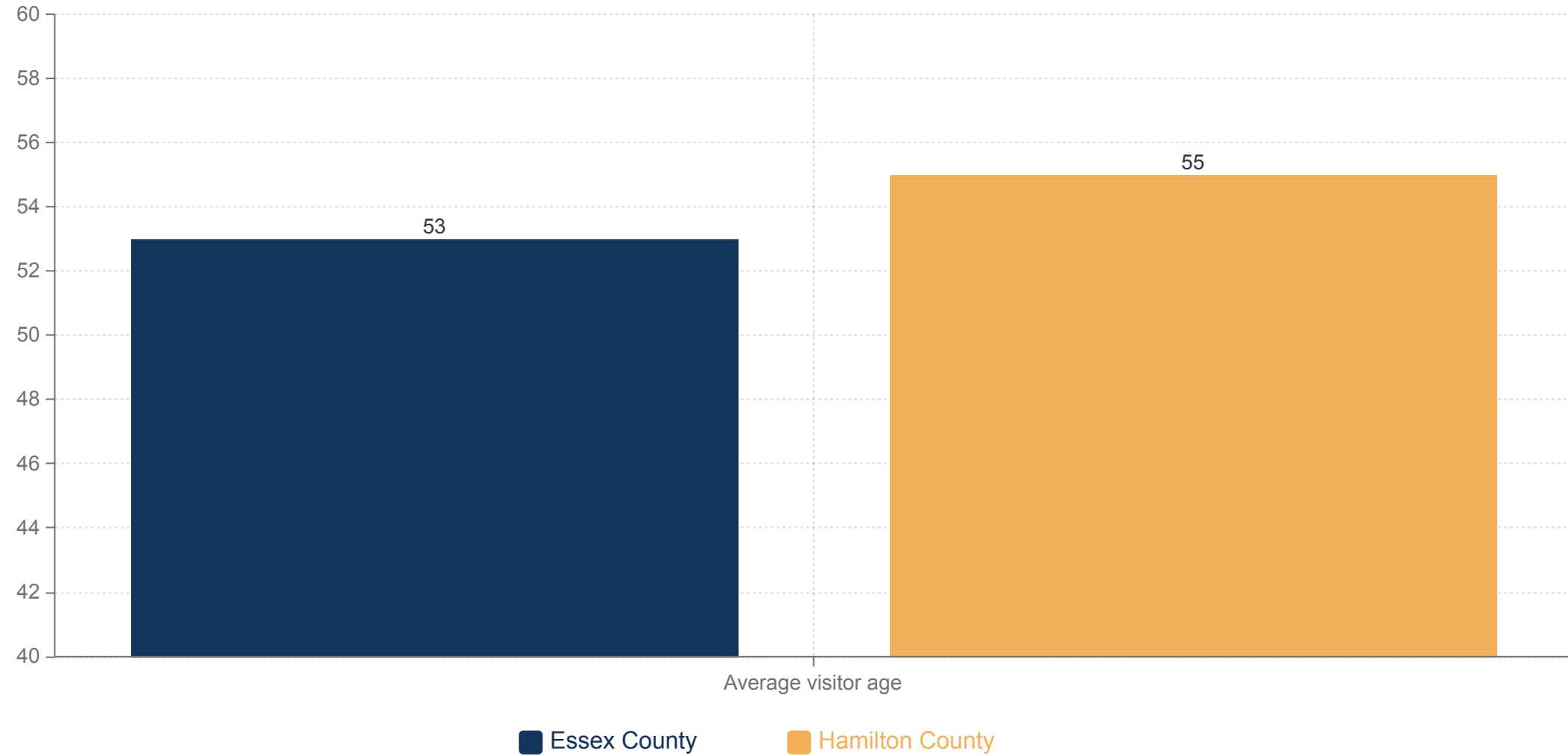
Ethnicity

All travelers



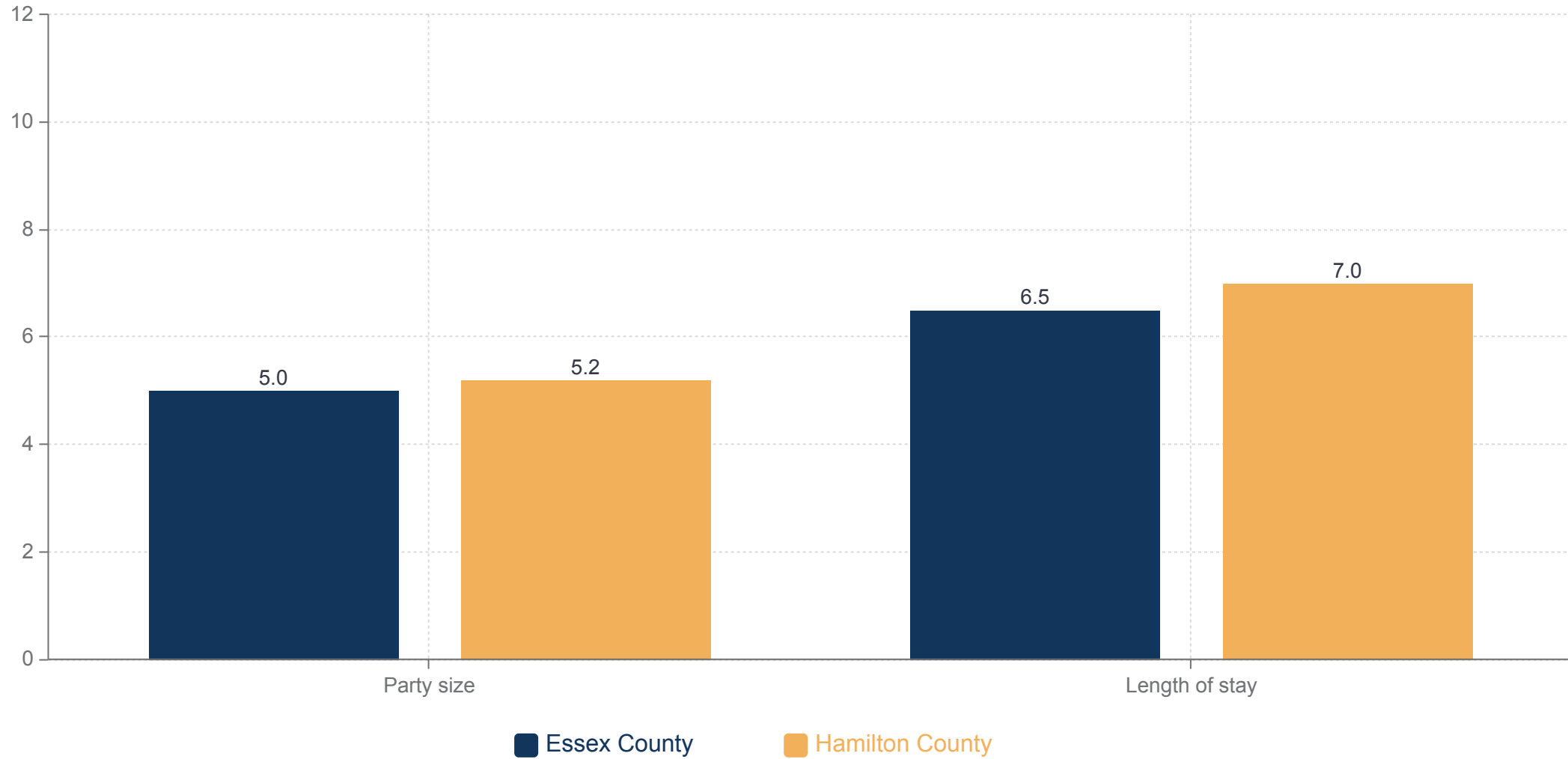
Average Age

All travelers



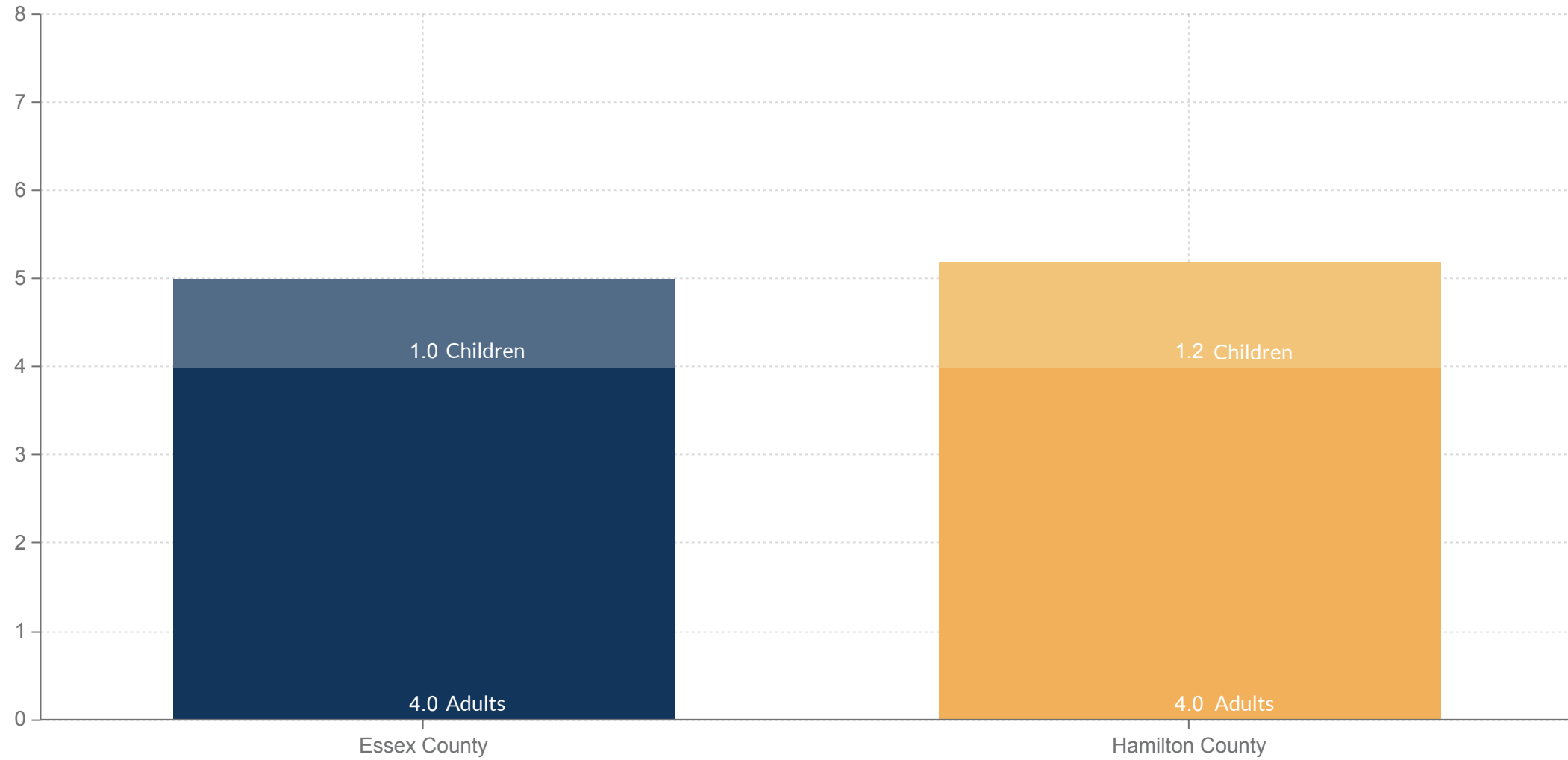
Party Size/Length of Stay

All travelers



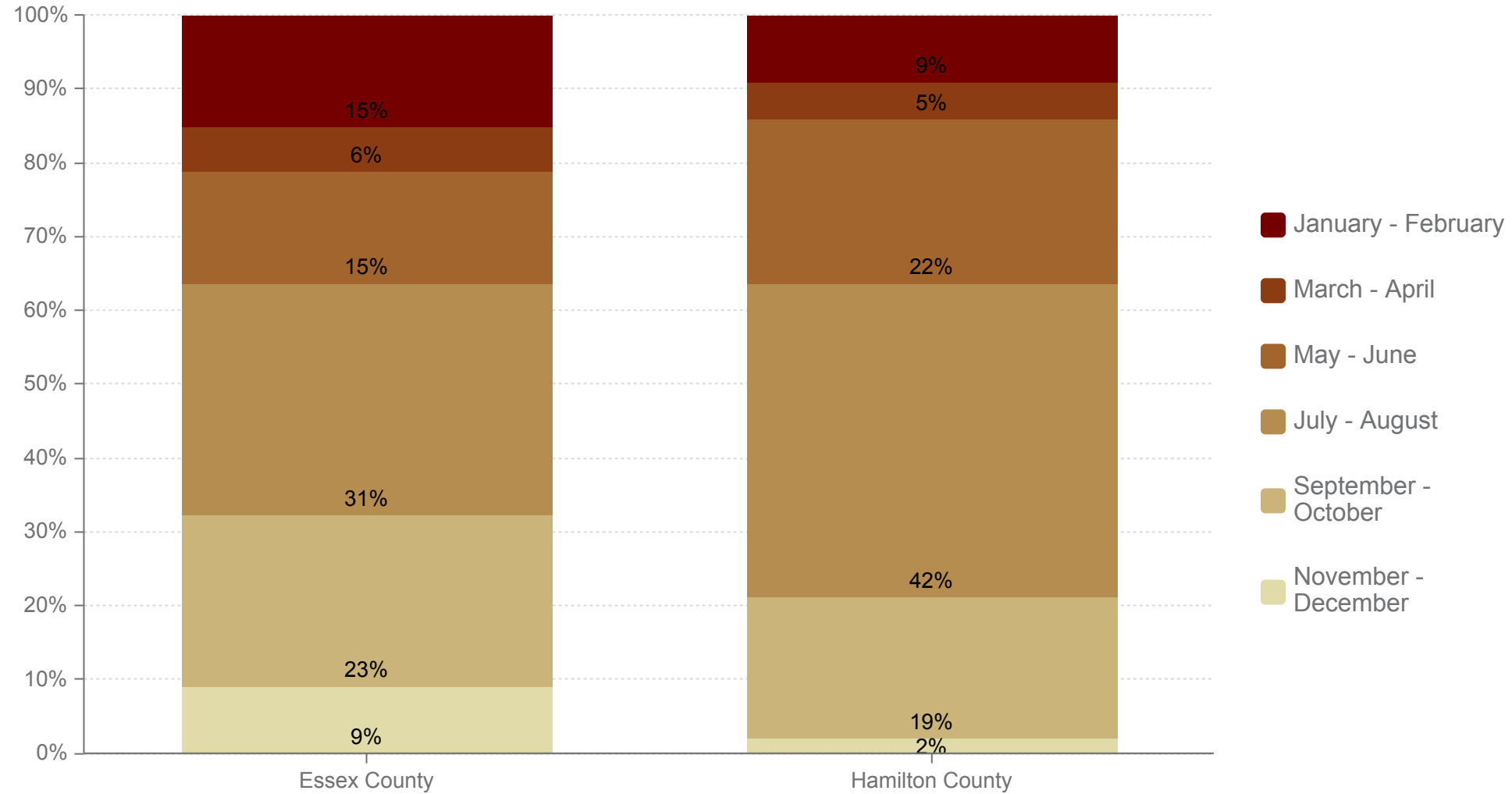
Party Composition

All travelers



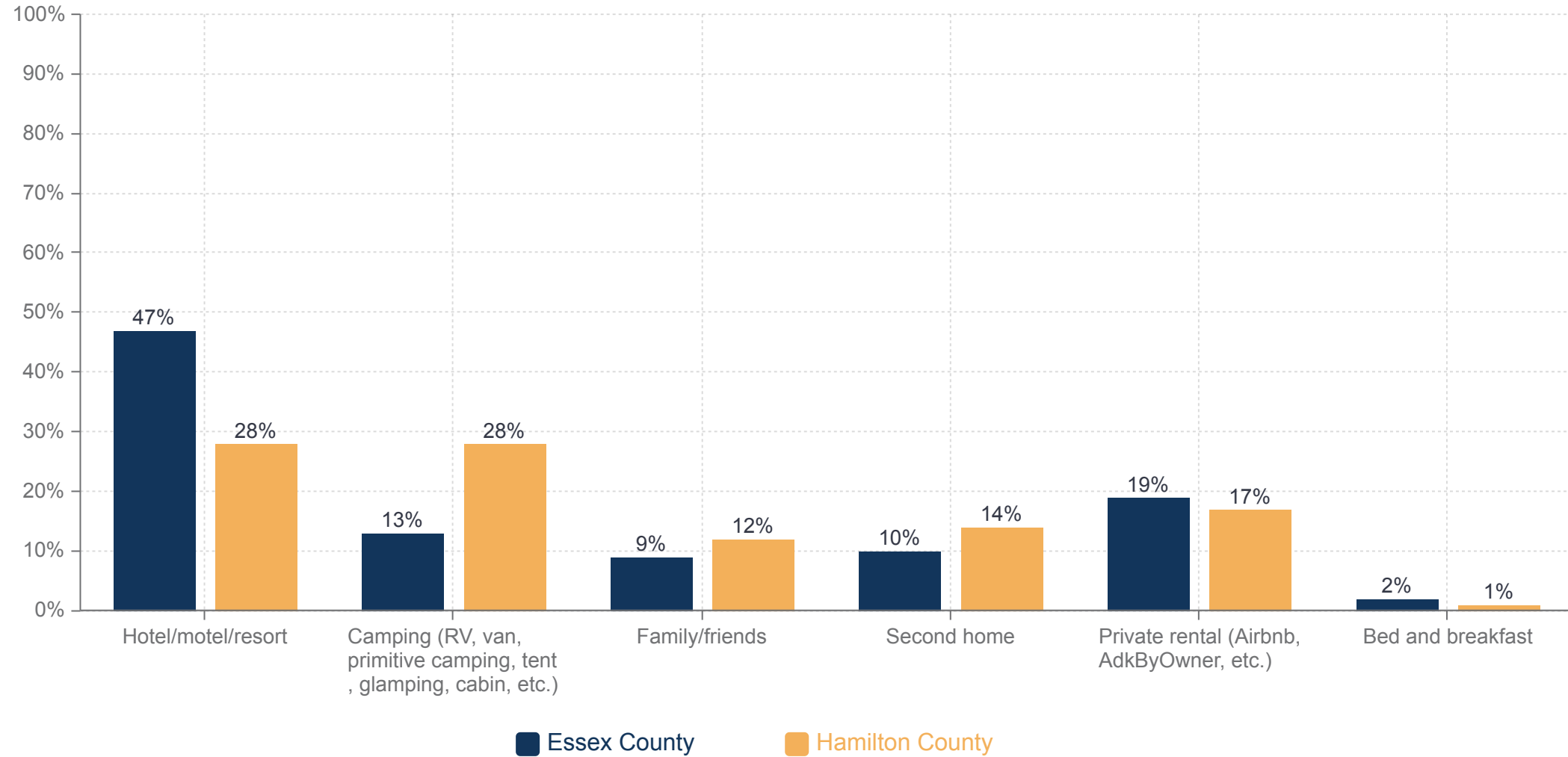
Time of Year Visited

All travelers



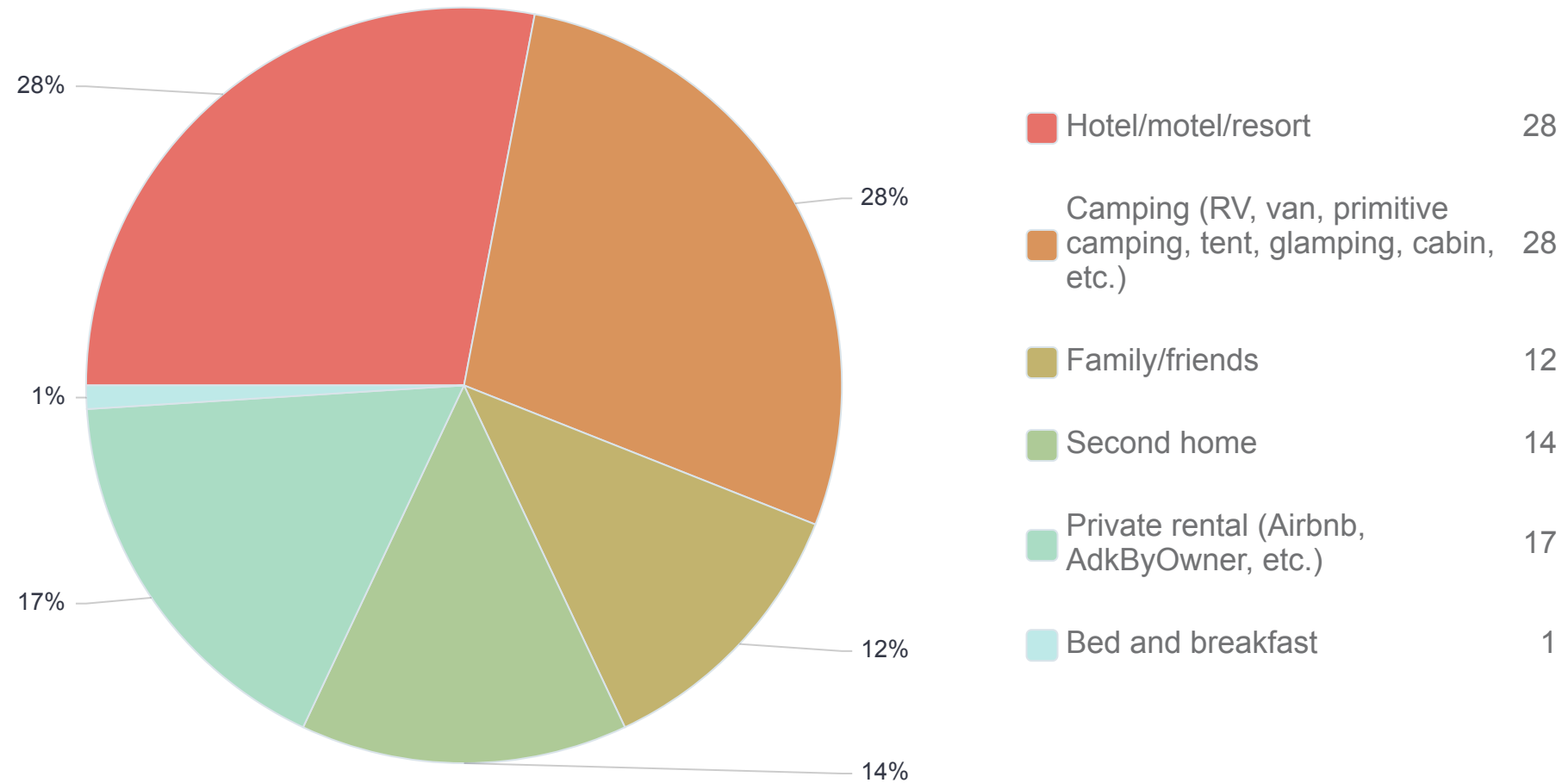
Lodging Accommodations

All travelers



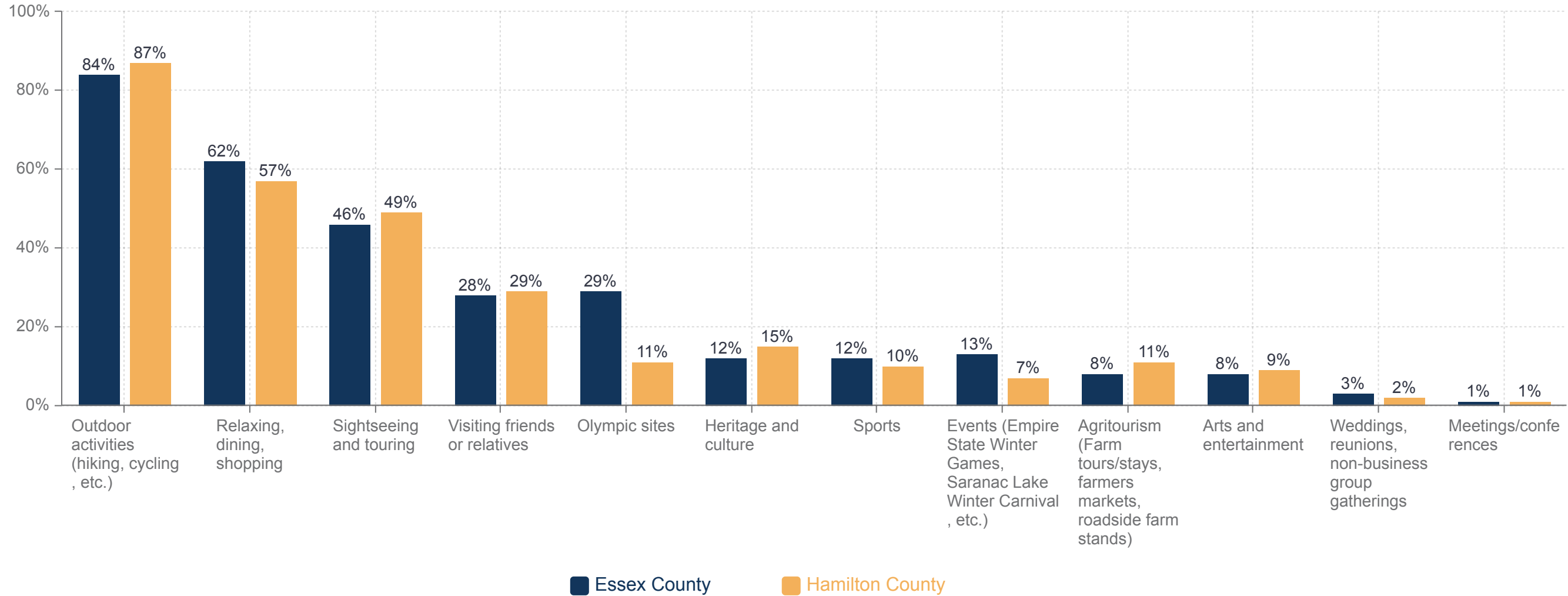
Lodging Accommodations

Hamilton County travelers



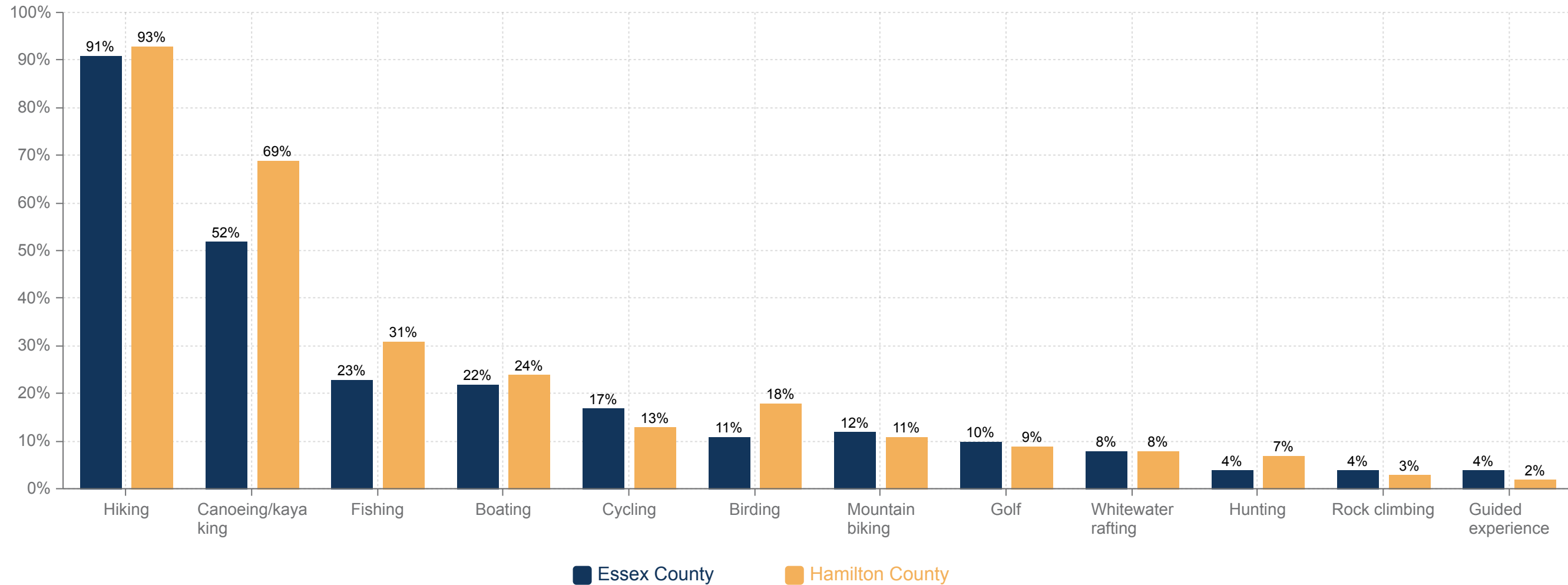
Key Attractions

All travelers



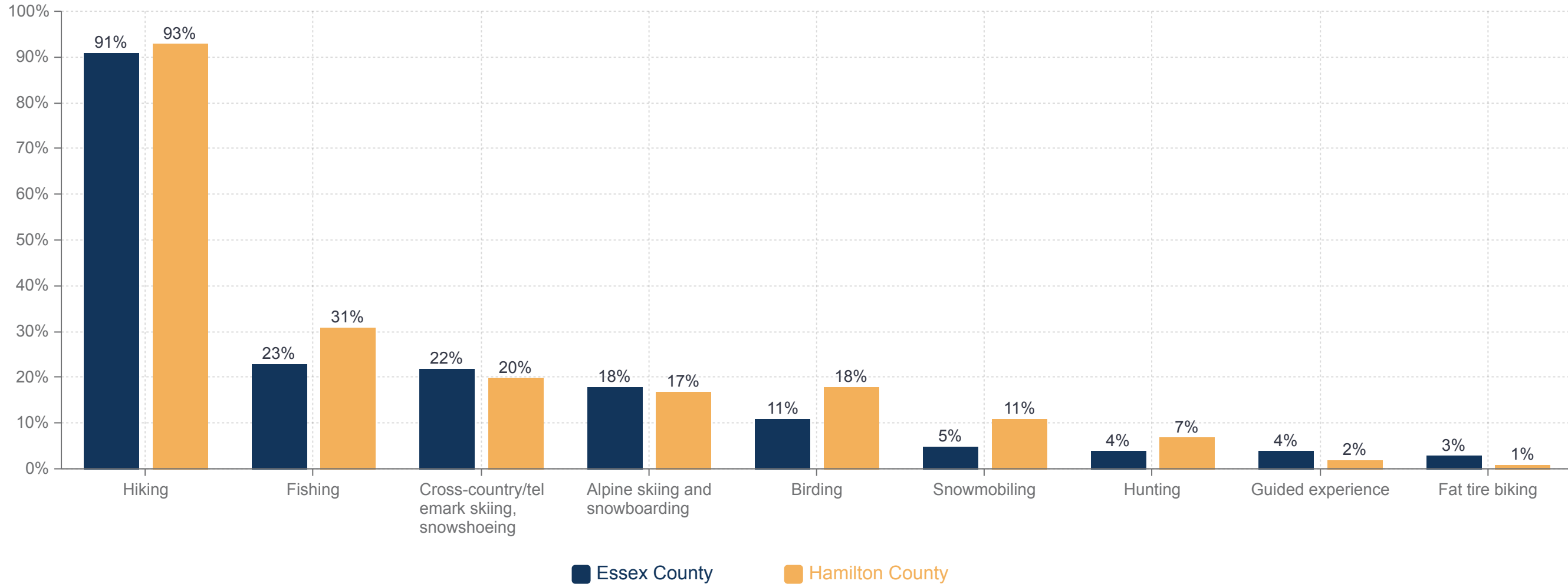
Outdoor Spring/Summer Activities

All travelers



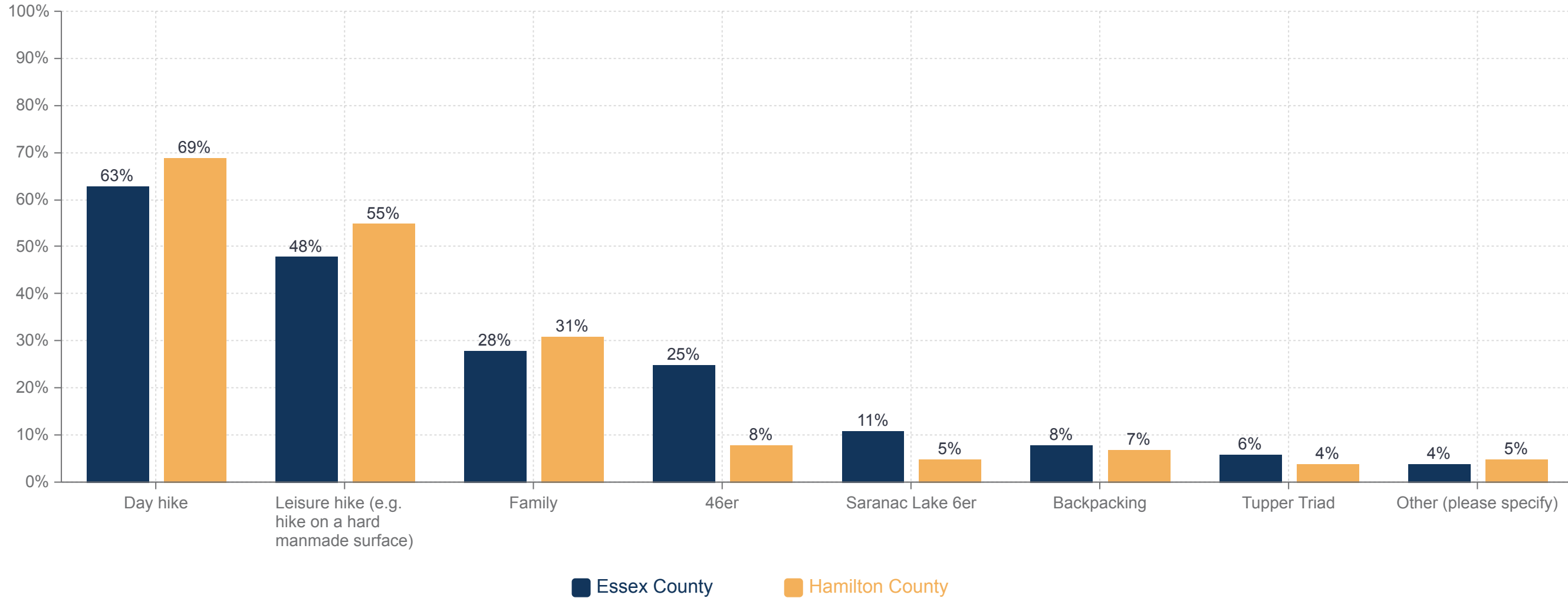
Outdoor Fall/Winter Activities

All travelers



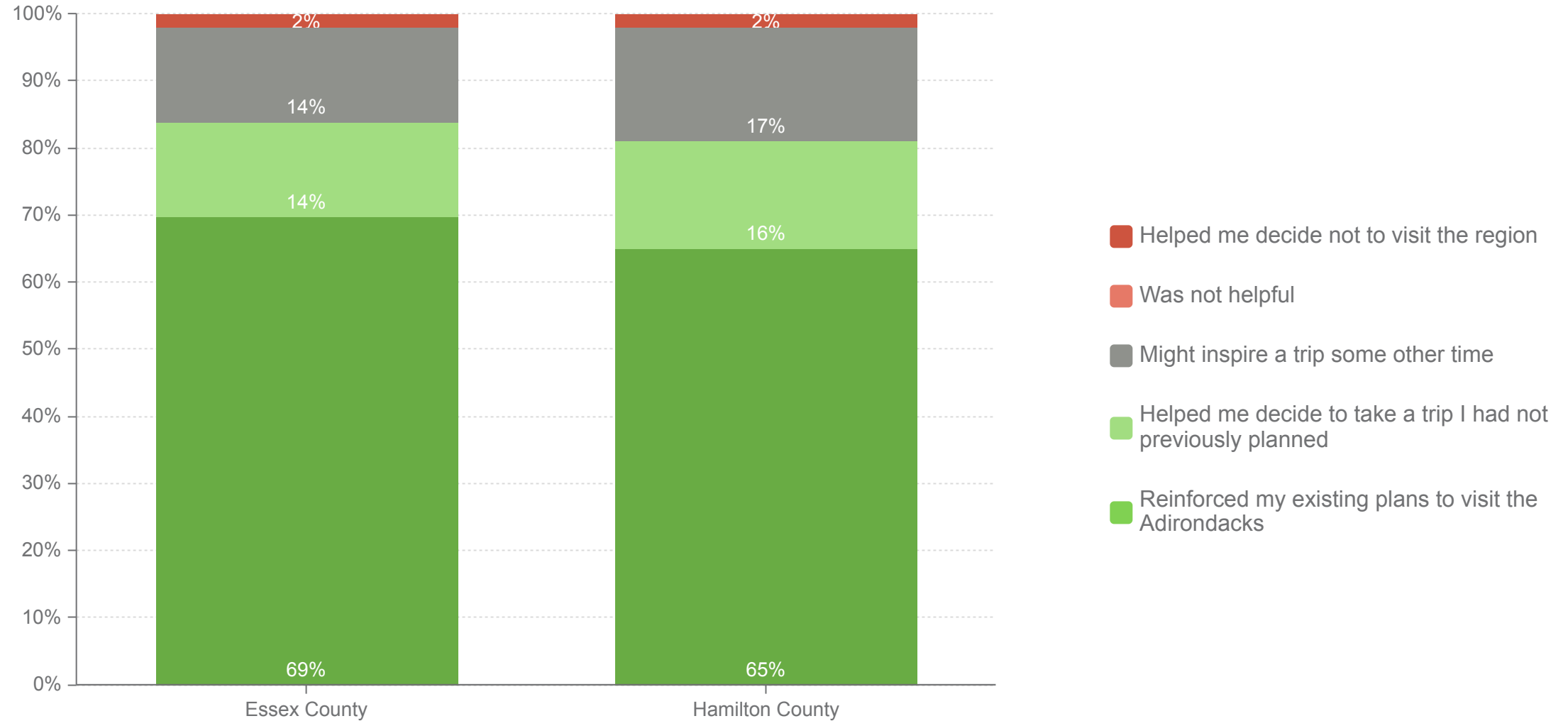
Hiking Breakdown

All travelers



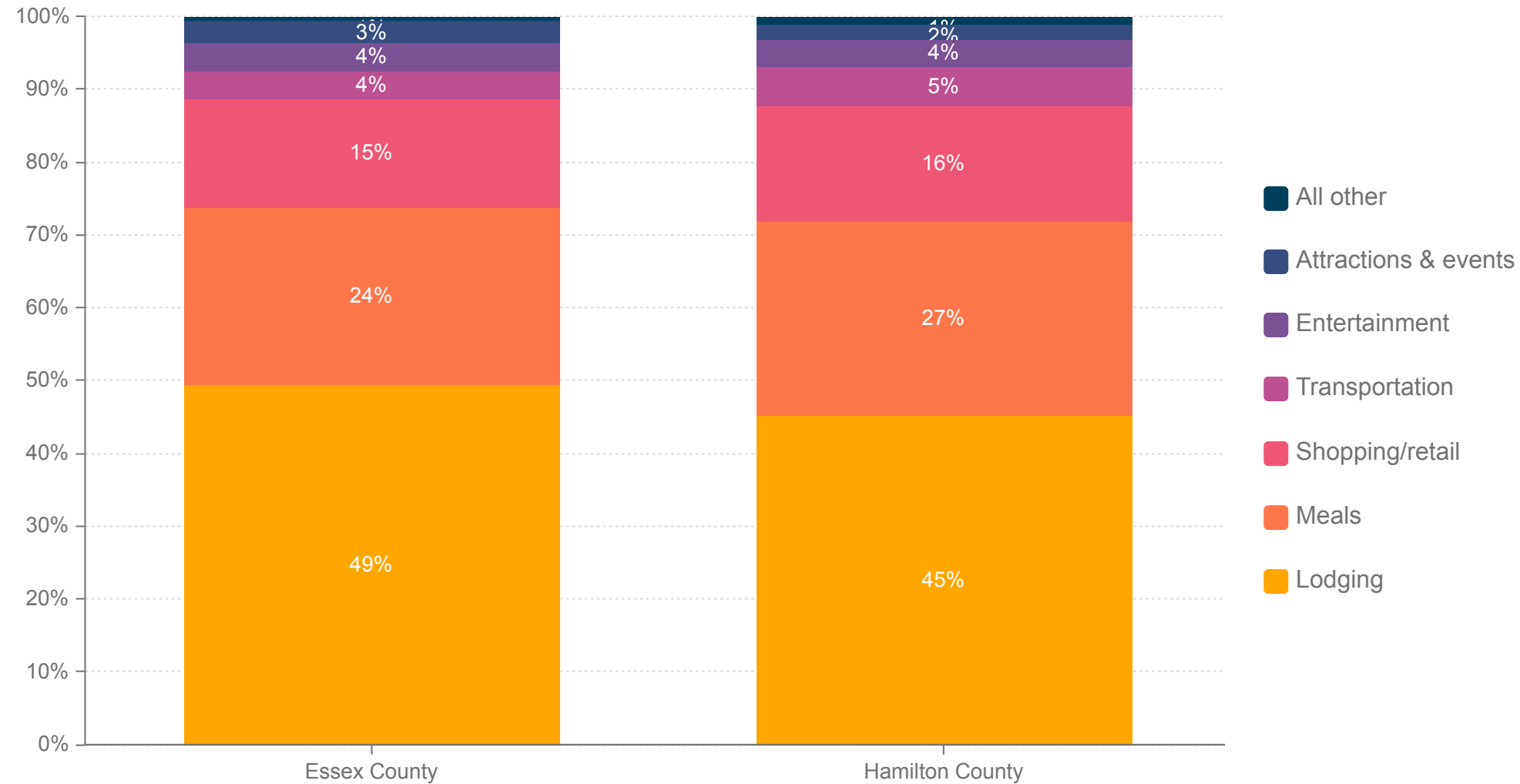
Conversion Rate from Viewing ROOST Marketing Materials

All travelers



Total Expenditure Allocation by Category

All travelers



Daily Mean Party Expenditures

All travelers

	Essex County	Hamilton County
Lodging	\$140	\$75
Meals	\$69	\$45
Shopping/retail	\$42	\$26
Attractions & events	\$11	\$9
Transportation	\$11	\$6
Entertainment	\$9	\$3
All other	\$1	\$2
Average daily expenditure	\$283	\$166
Average total expenditure	\$1,842	\$1,167

The background of the slide is an aerial photograph of a forested area. A road runs vertically through the center, with several buildings and parking areas visible on either side. The trees are mostly green, with some showing early autumn colors. The sky is a gradient of orange and yellow, suggesting a sunset or sunrise.

Hamilton County Visitor Profile

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Visitor Profile

All Hamilton County travelers

- 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 children. 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.

Visitor Profile

All Hamilton County travelers

- 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.

Visitor Profile

All Hamilton County travelers

- 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%.
- The 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.

Visitor Profile

All Hamilton County travelers

- A big jump in interest in agritourism was reported by 2020 visitors (from 5% in 2019 to 11%).
- 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/boardboarding (12%) and snowmobiling (11%) all showed substantial increased reported in interest as outdoor activities as well, by 2020 visitors.

Visitor Profile

All Hamilton County travelers

- 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.
- 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.

Visitor Profile

All Hamilton County travelers

- 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.

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

A photograph of three people in a cafe or kitchen setting. On the left, a woman with braided hair, wearing a black turtleneck, is smiling and holding a white mug. In the center, an older man with glasses and a face mask, wearing a light blue shirt and a white jacket, is leaning over a counter. On the right, a younger man with a beard, wearing a green cap and an orange jacket, is smiling and holding a plate of food. The background shows a kitchen area with a sign that reads "WE ARE KEEPING IT CLEAN & SAFE FOR ALL".

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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.