

2020 Leisure Travel Study

Visitor Profiles and Regional Return on Marketing Investment Analysis

June 2021

ROOST

Project Background & Methodology

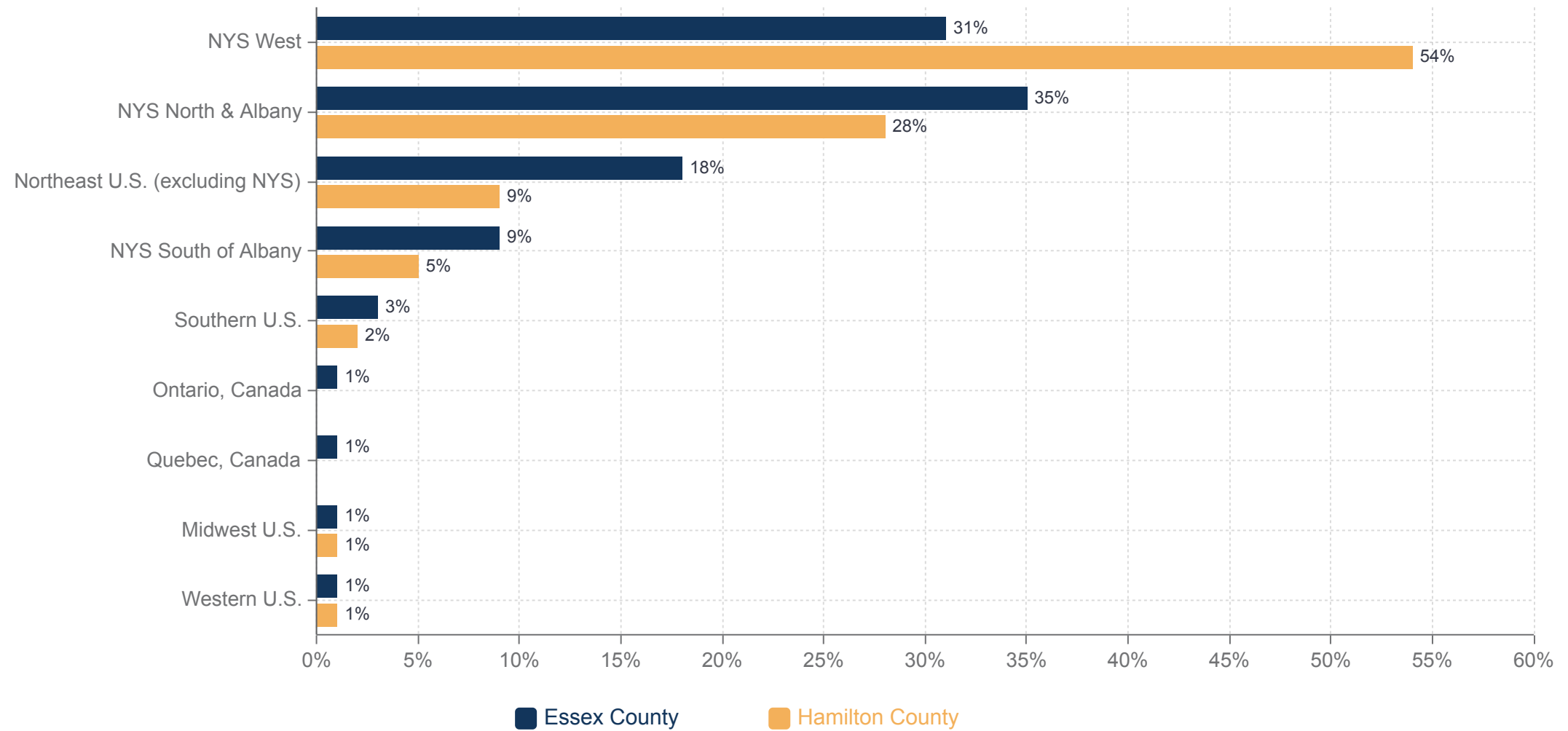
- ROOST manages the marketing tourism assets for the Adirondack Region of Essex and Hamilton counties including Tupper Lake, Saranac Lake, Lake Placid.
- The agency commissioned a study, as it has for the past five years, to determine leisure traveler information at the county levels and to gauge key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

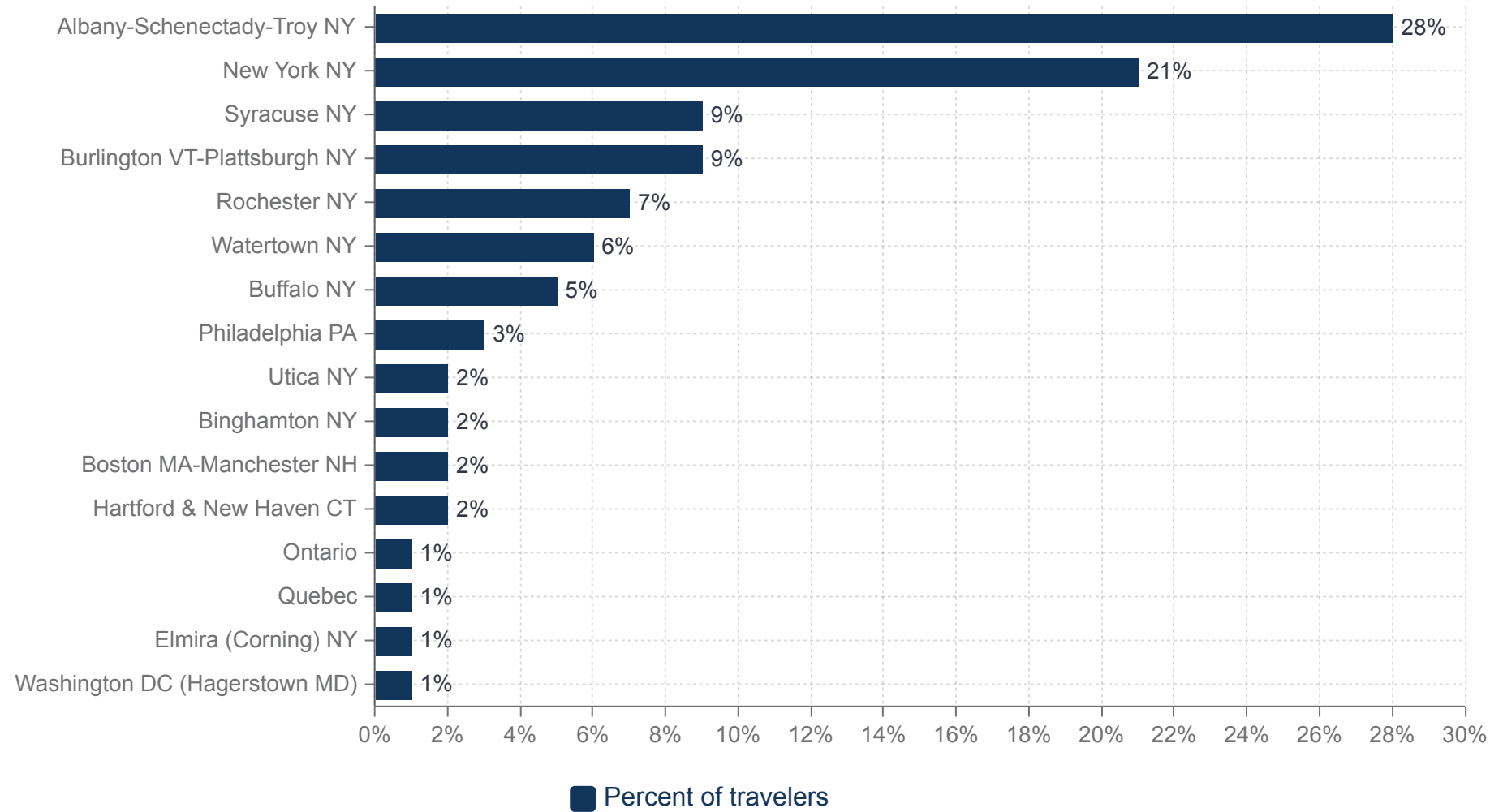
Area of Residence

All travelers



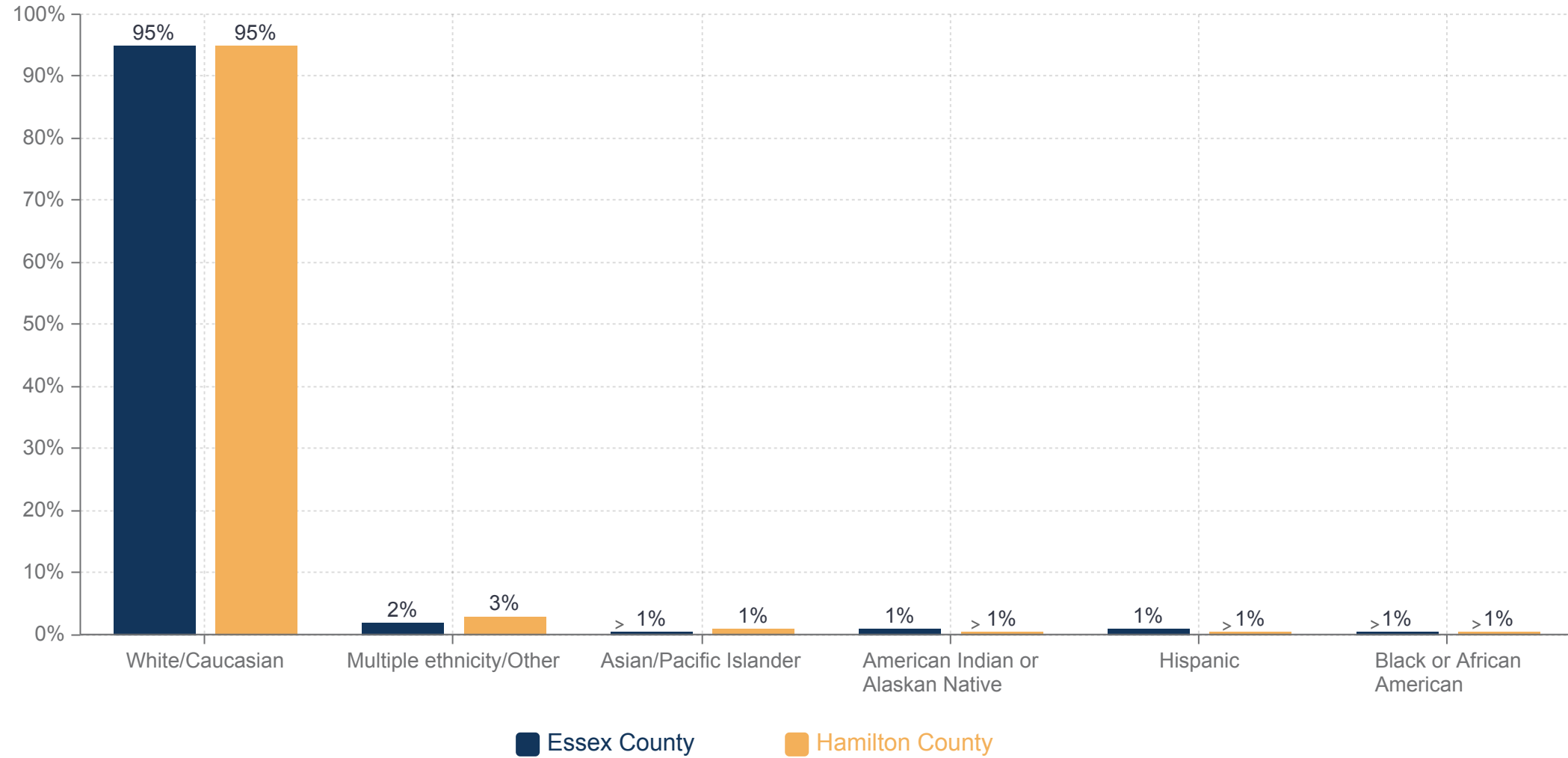
Area of Residence by DMA

Essex County travelers



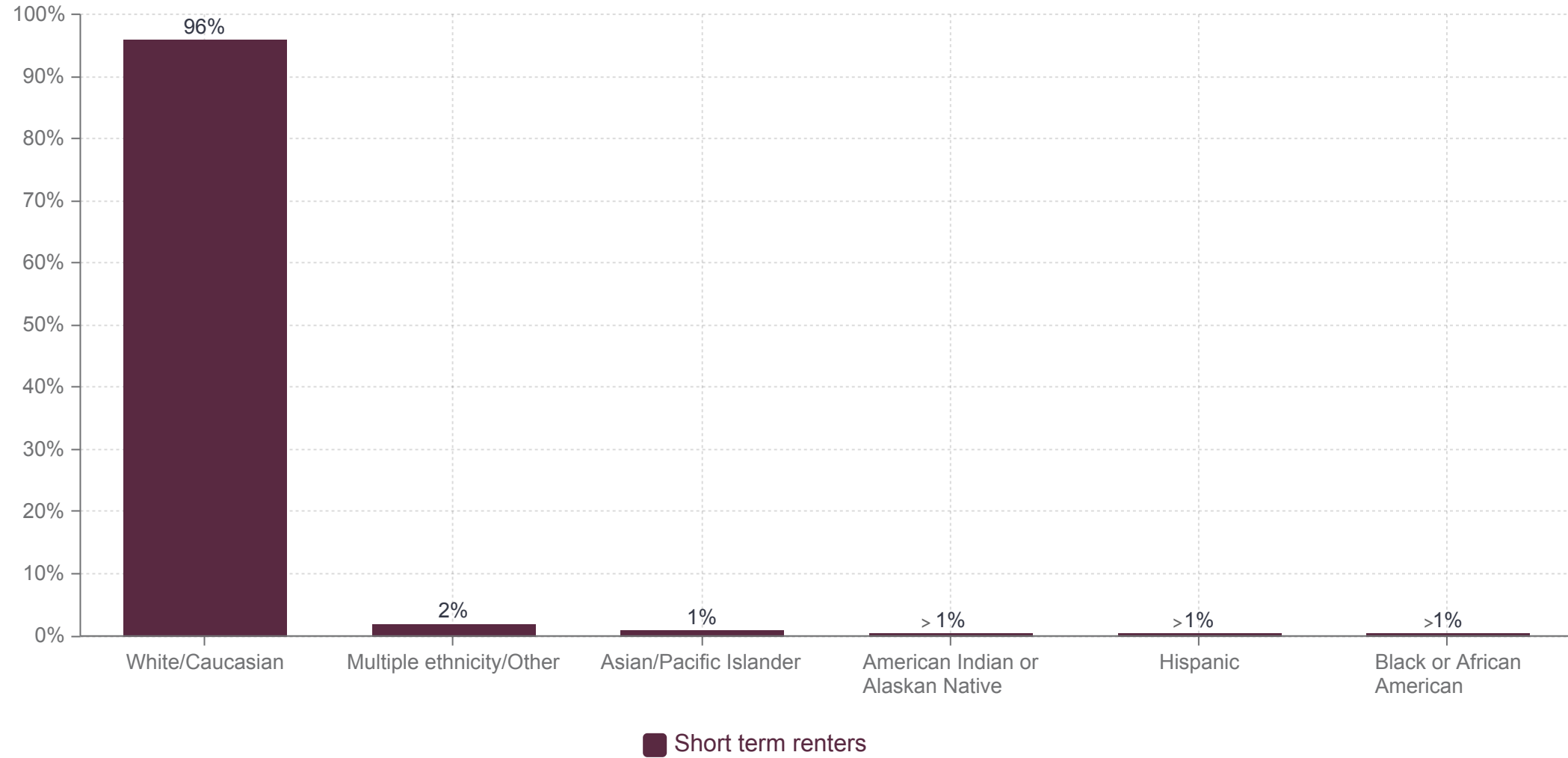
Ethnicity

All travelers



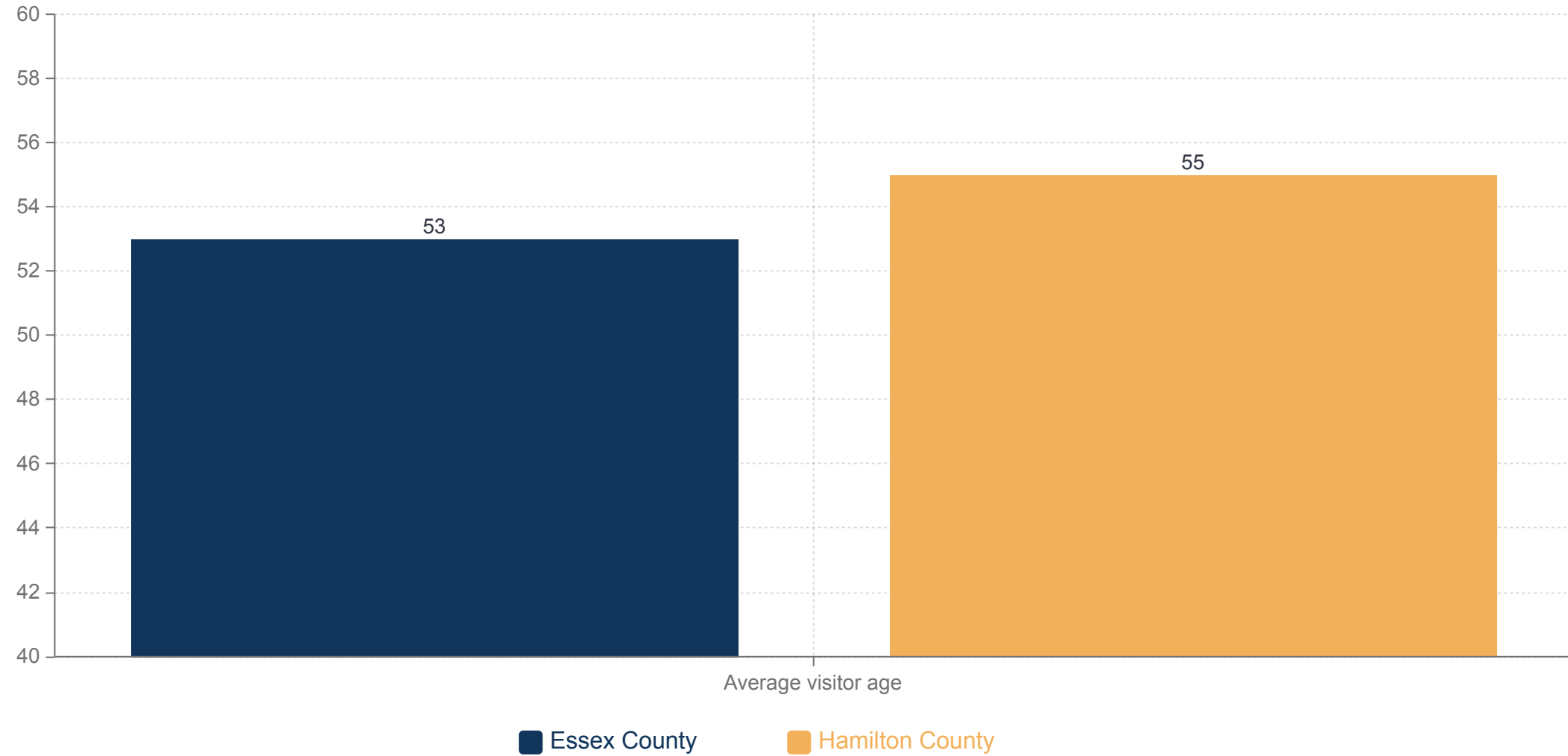
Ethnicity

Short term renters



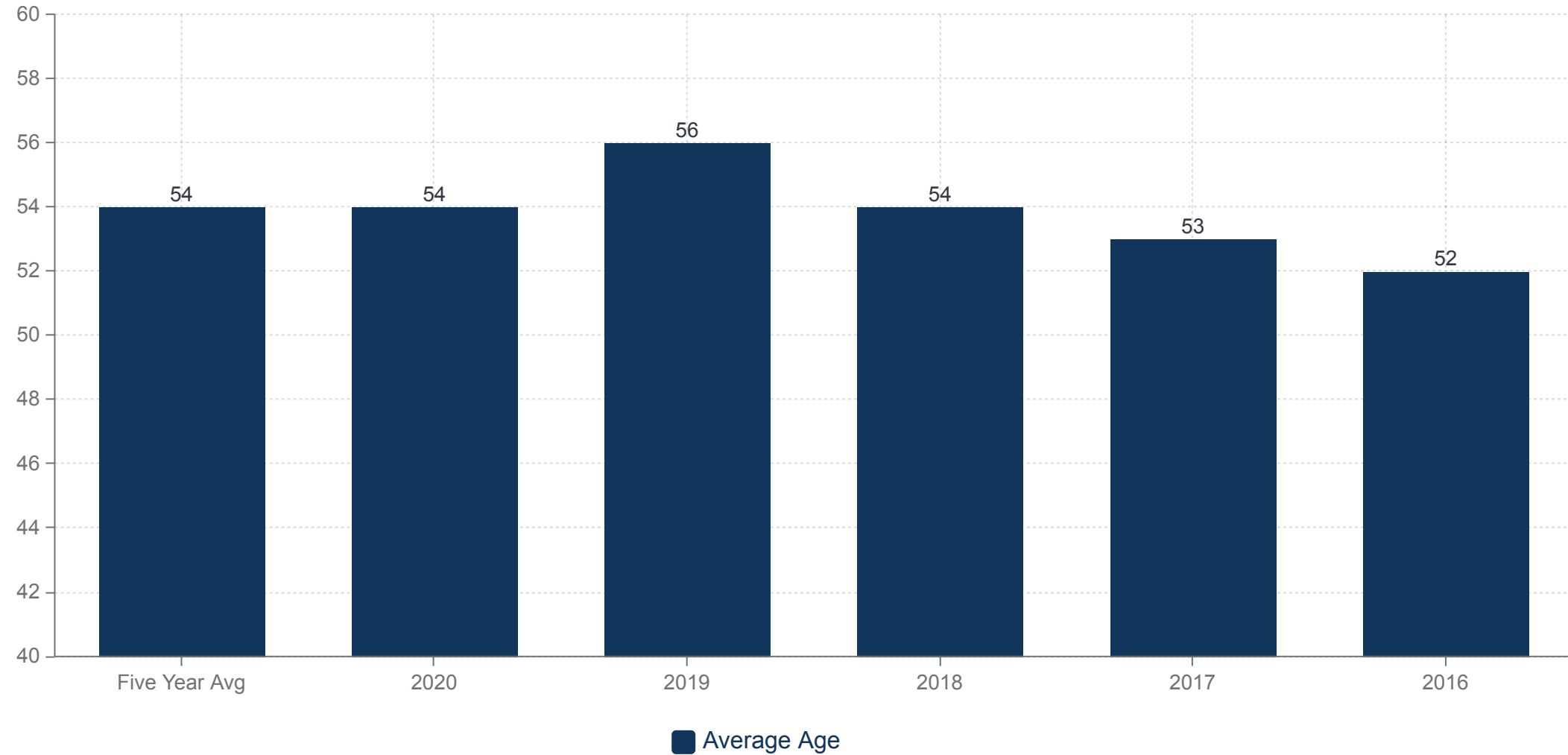
Average Age

All travelers



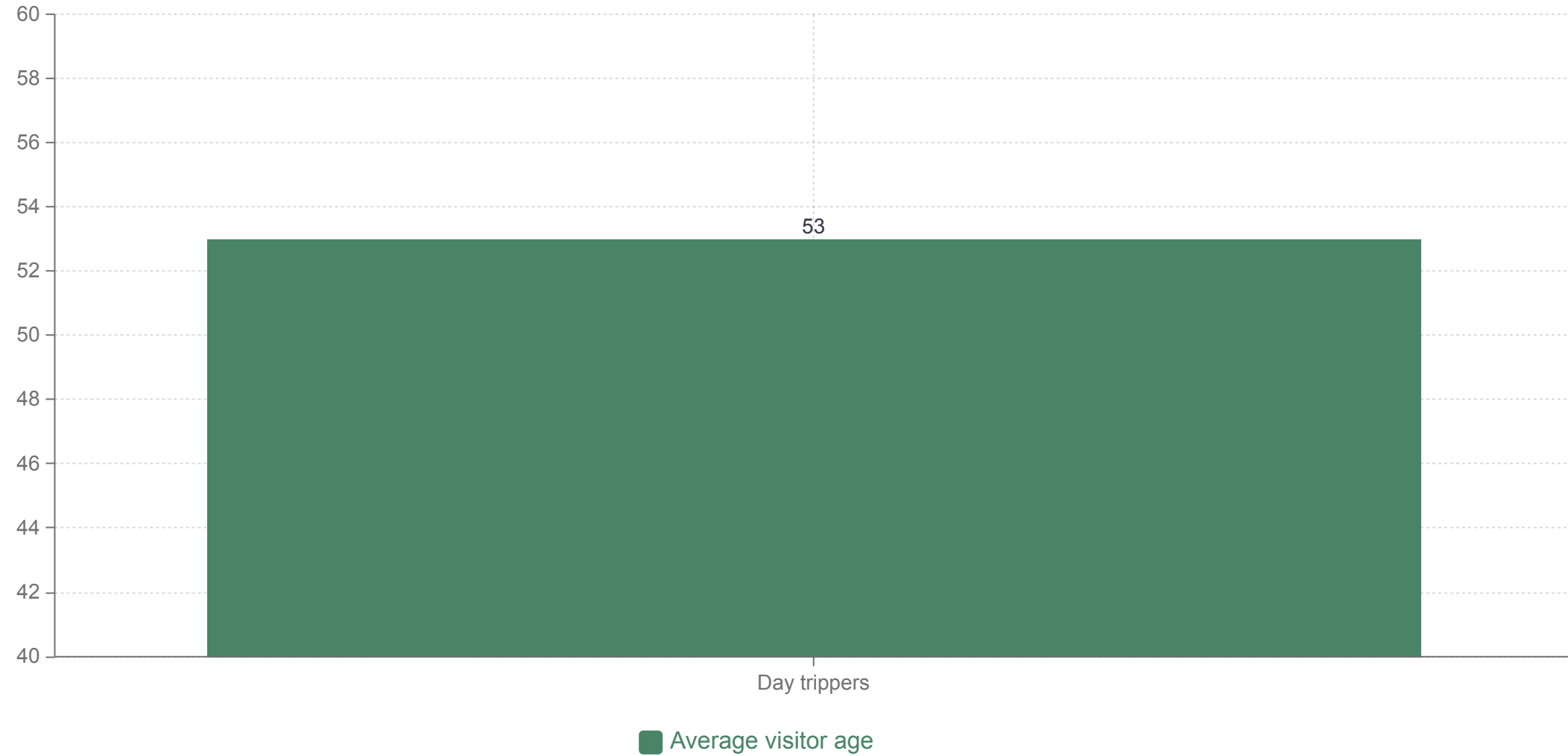
Five Year Average Age*

Essex County travelers



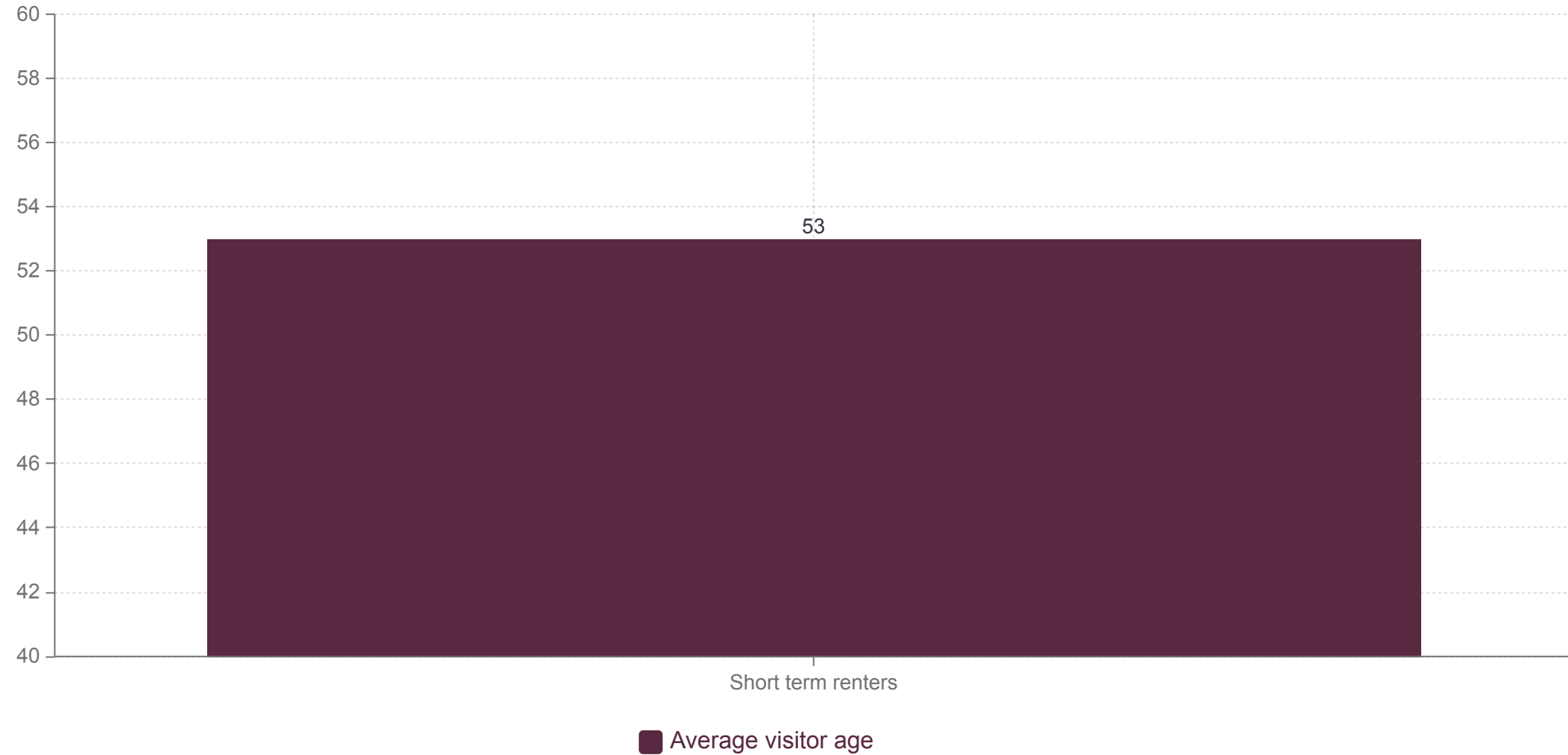
Average Age

Day trippers



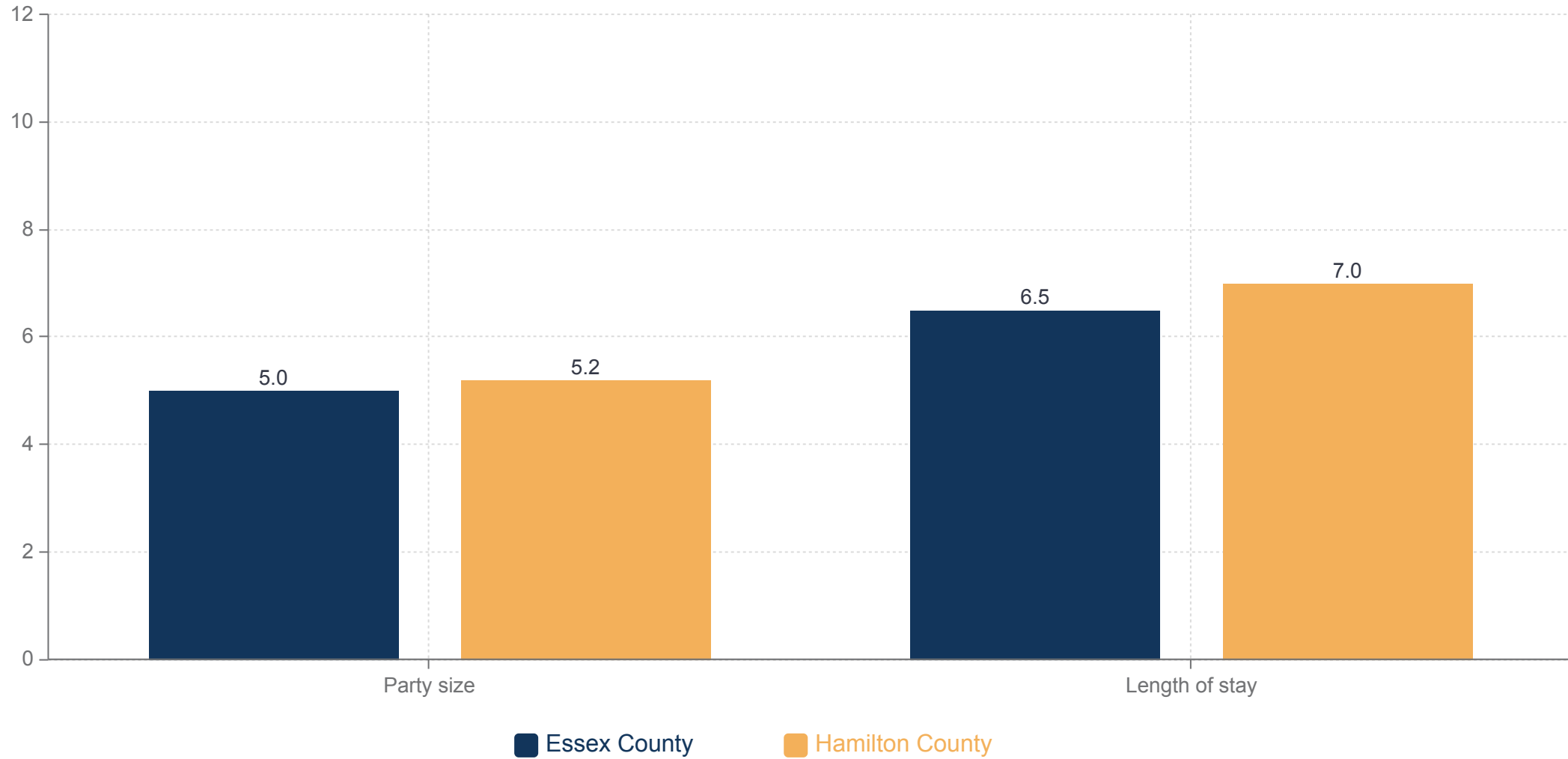
Average Age

Short term renters



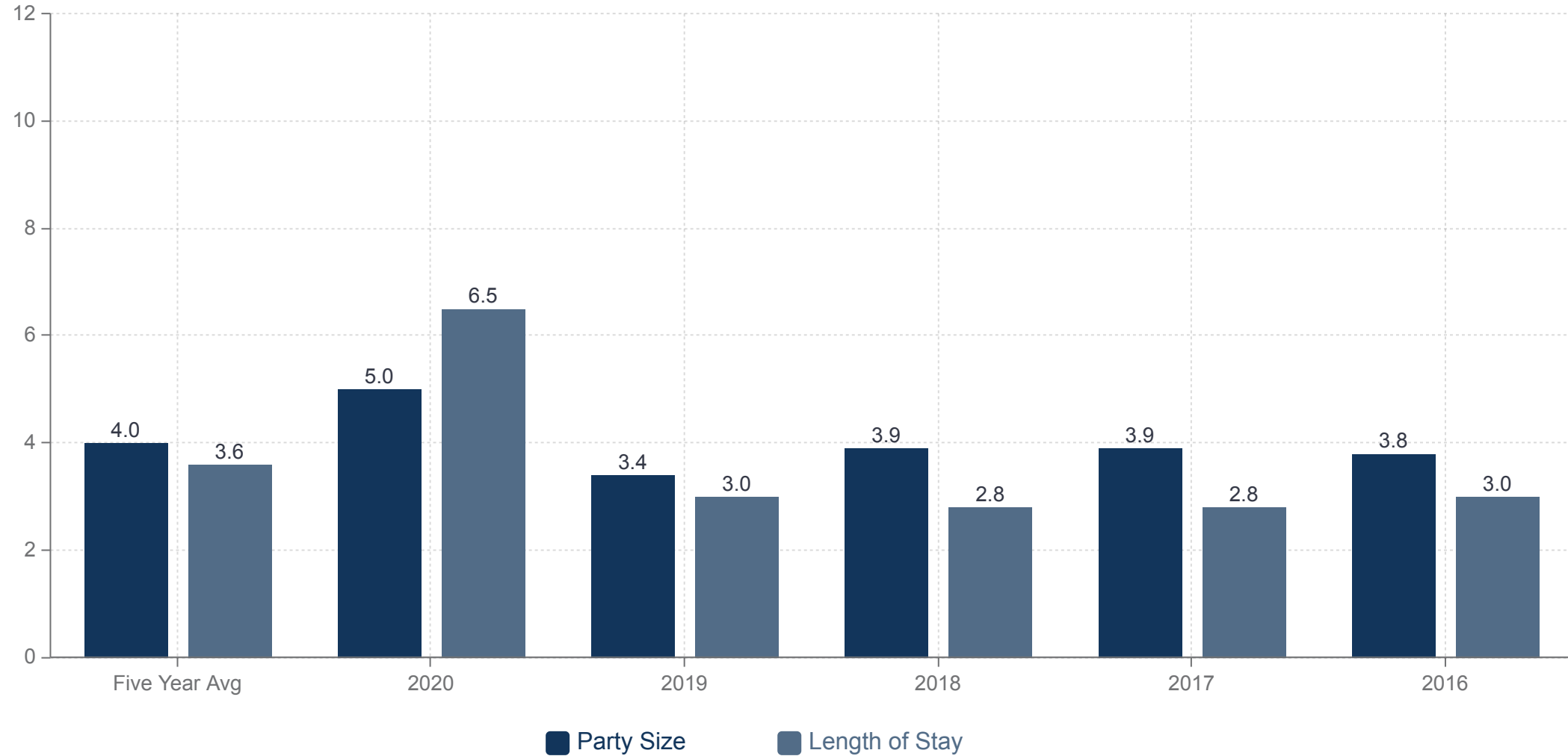
Party Size/Length of Stay

All travelers



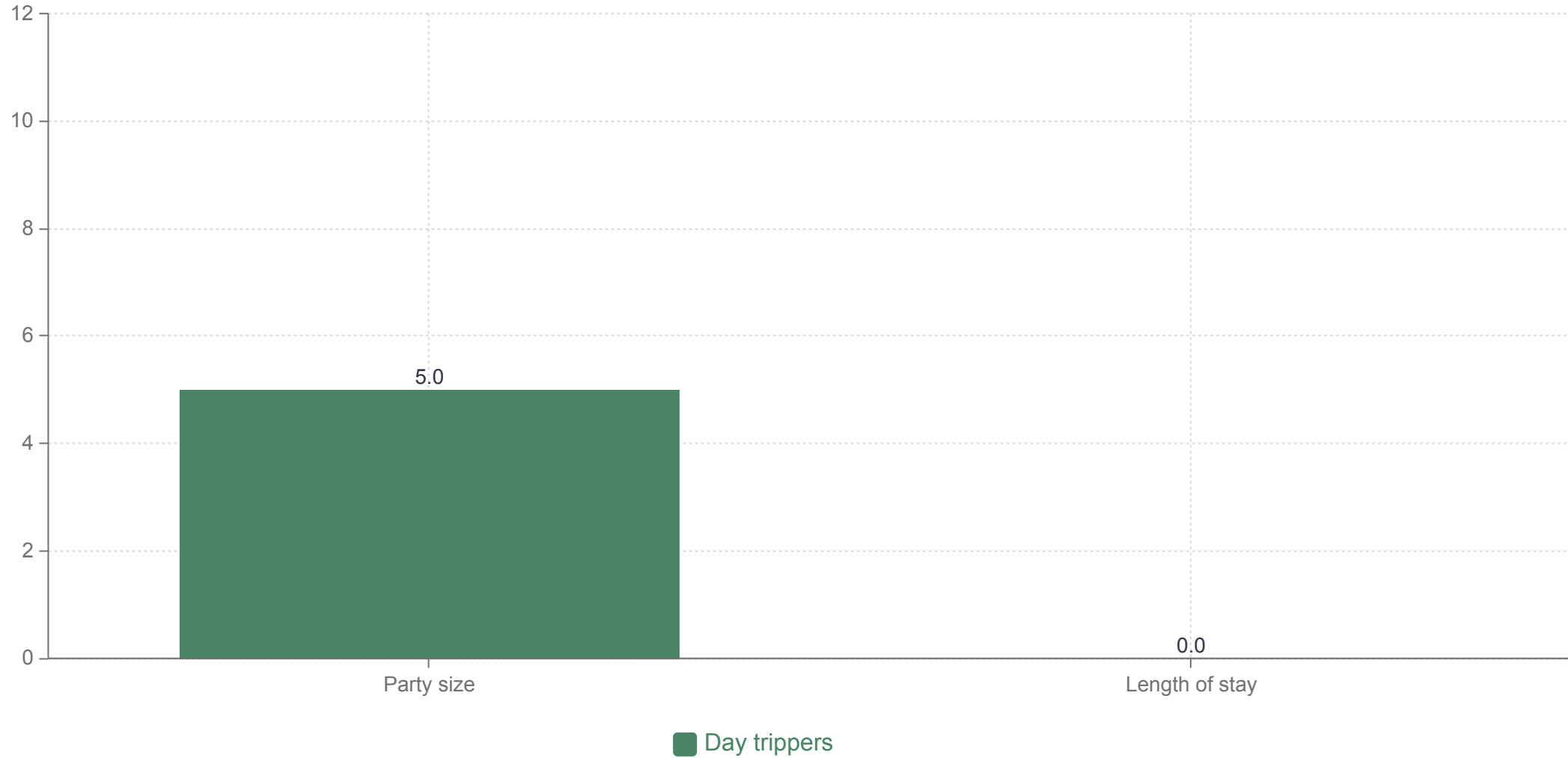
Five Year Average Party Size / Length of Stay*

Essex County travelers



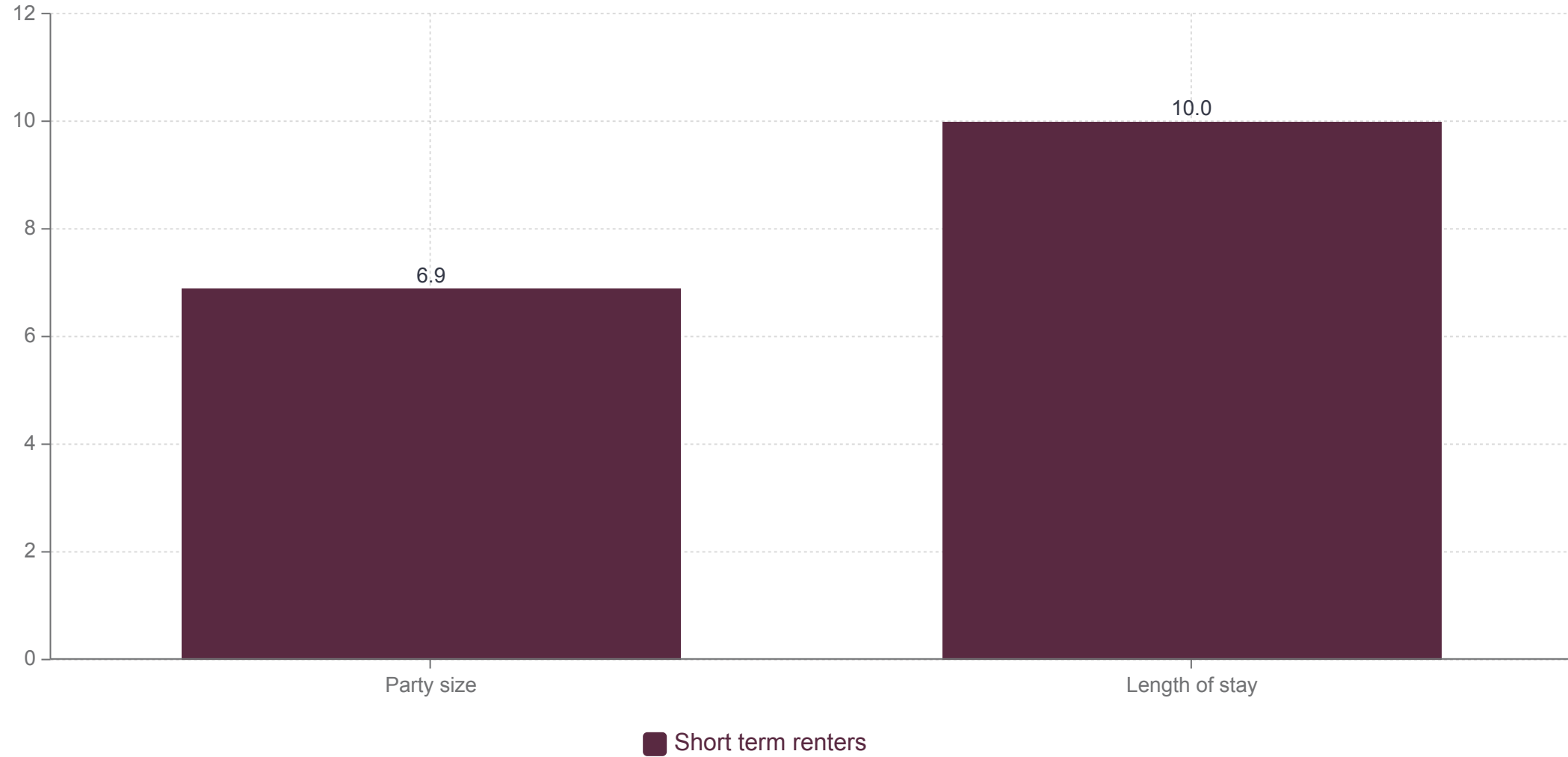
Party Size / Length of Stay

Day trippers



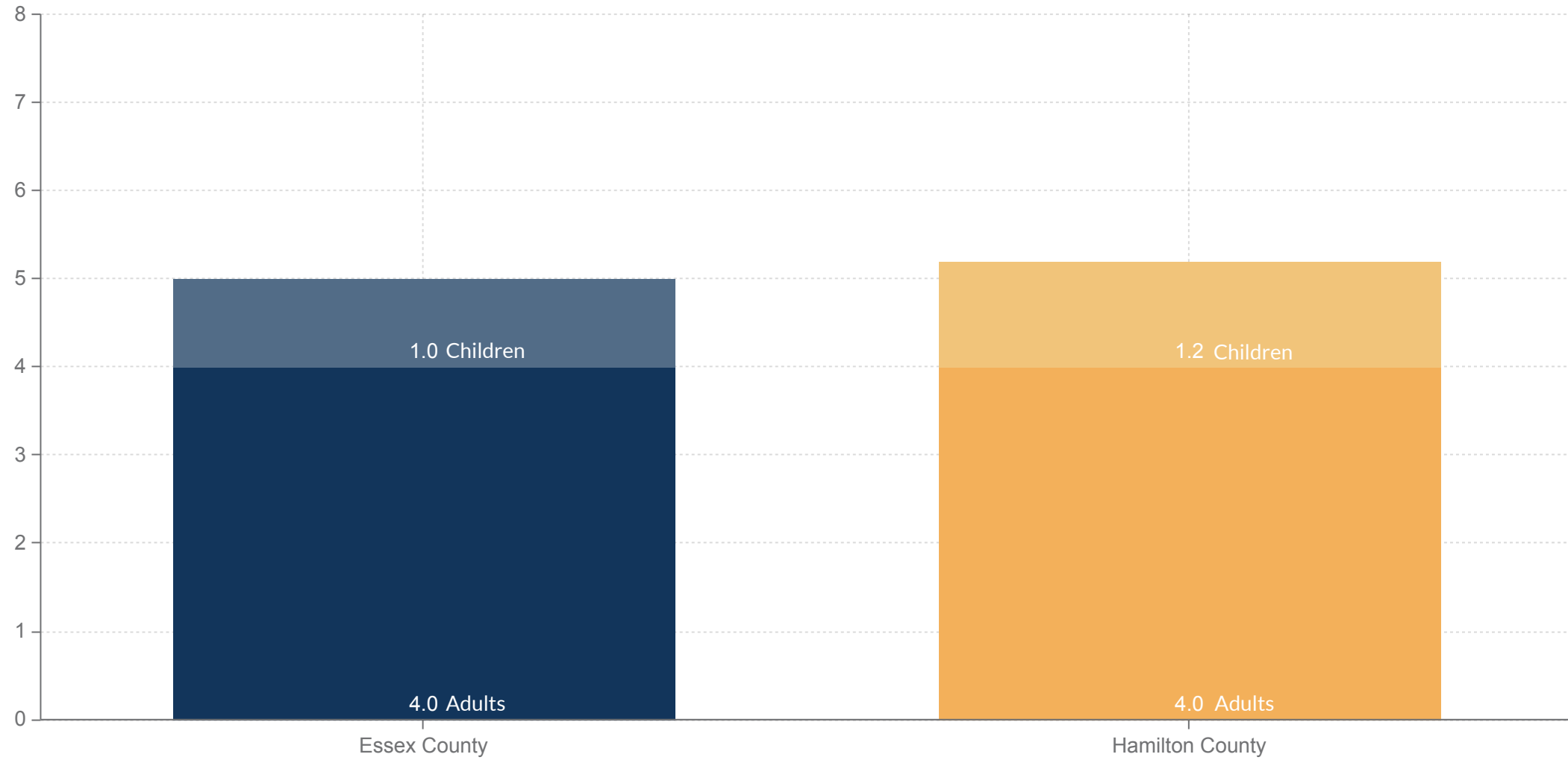
Party Size / Length of Stay

Short term renters



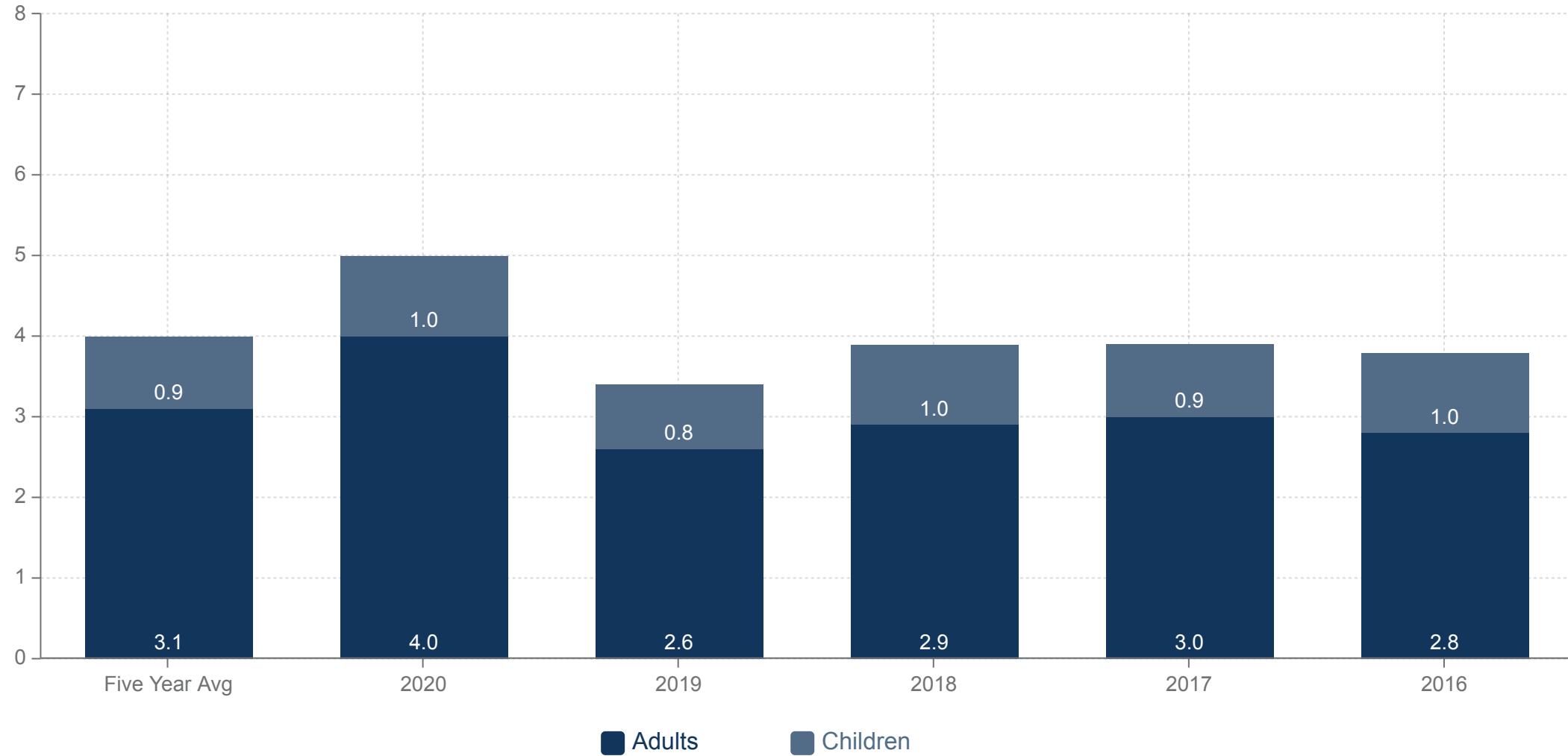
Party Composition

All travelers



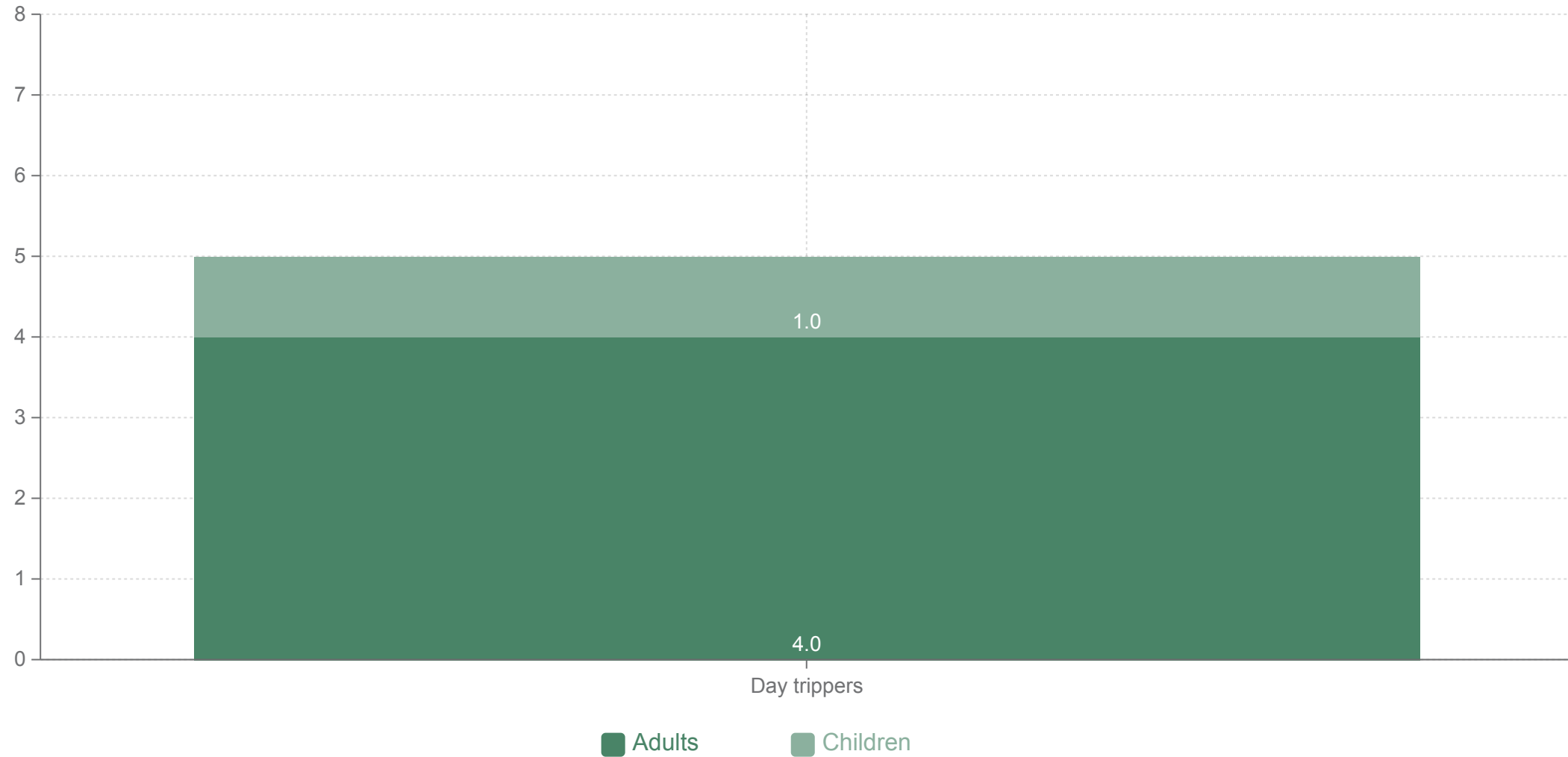
Five Year Average Party Composition

Essex County travelers



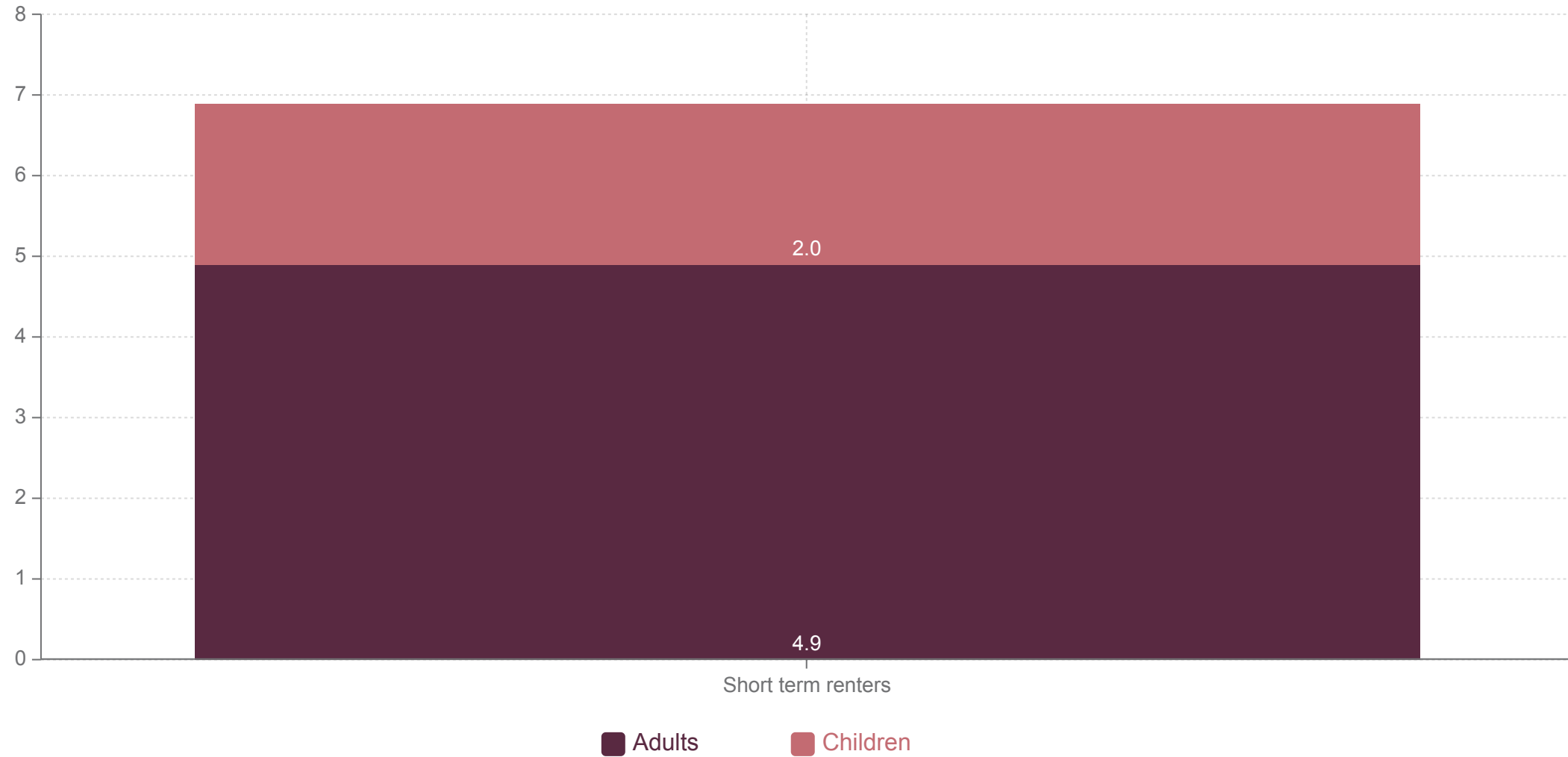
Party Composition

Day trippers



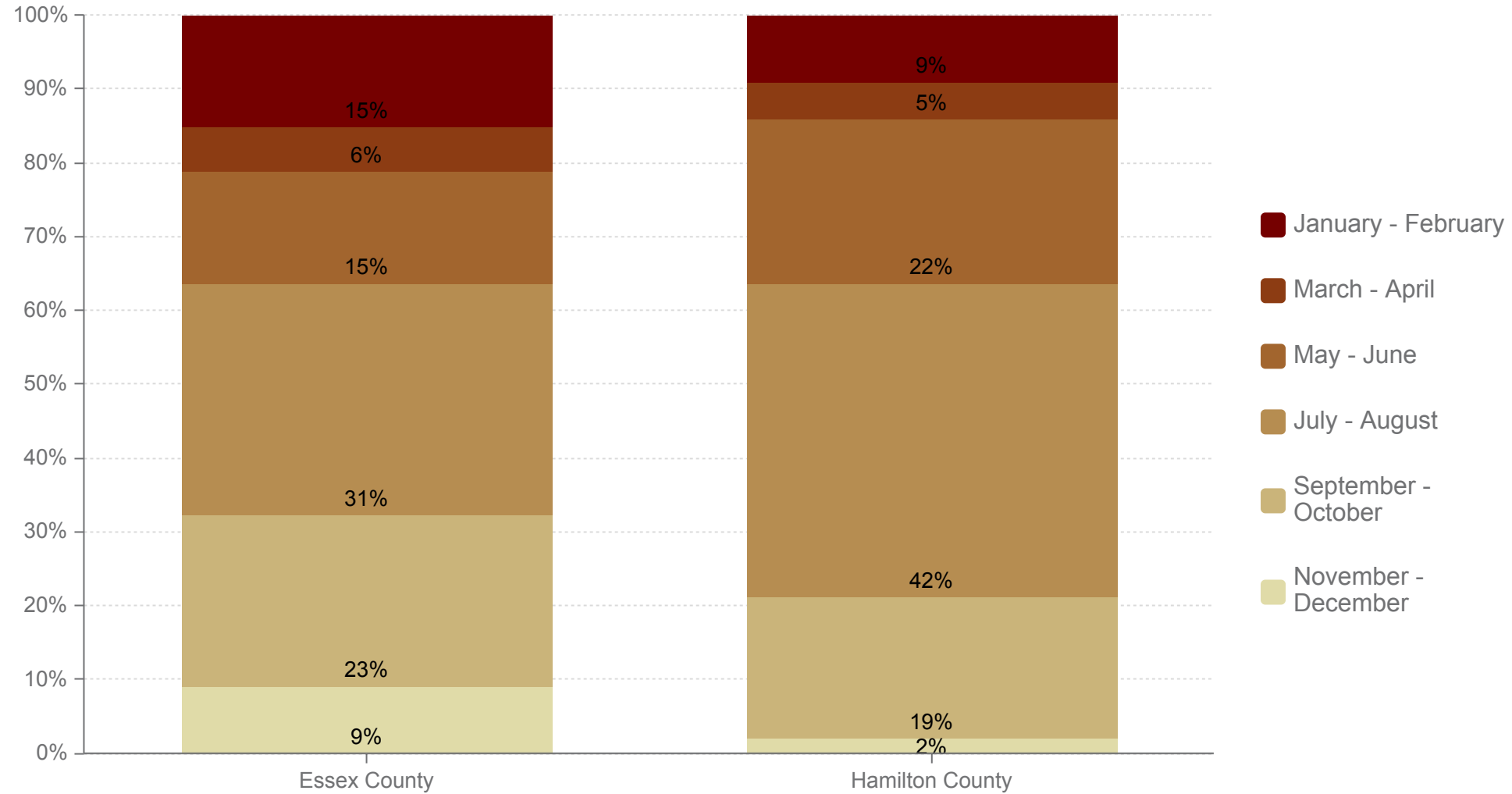
Party Composition

Short term renters



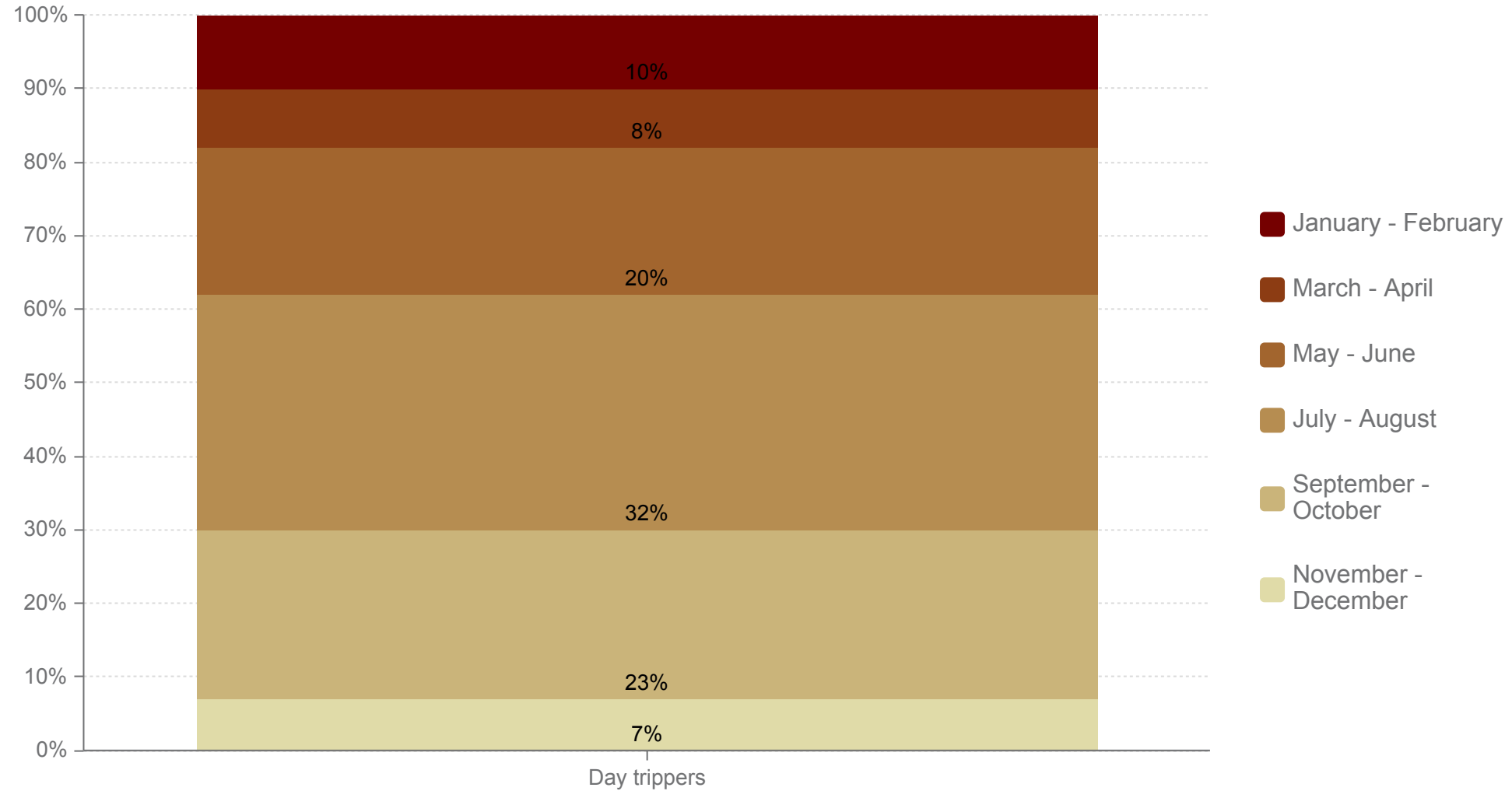
Time of Year Visited

All travelers



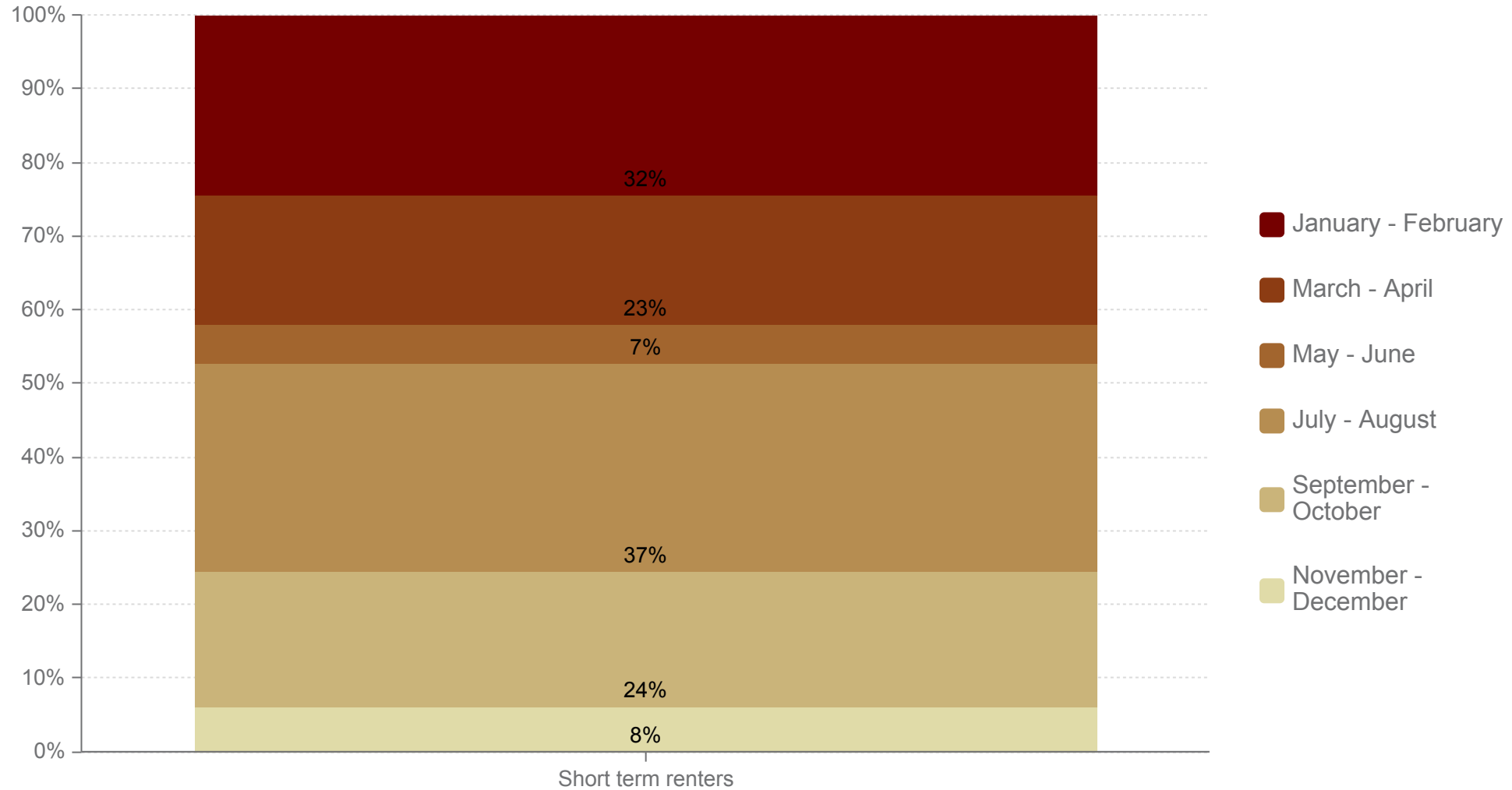
Time of Year Visited

Day trippers



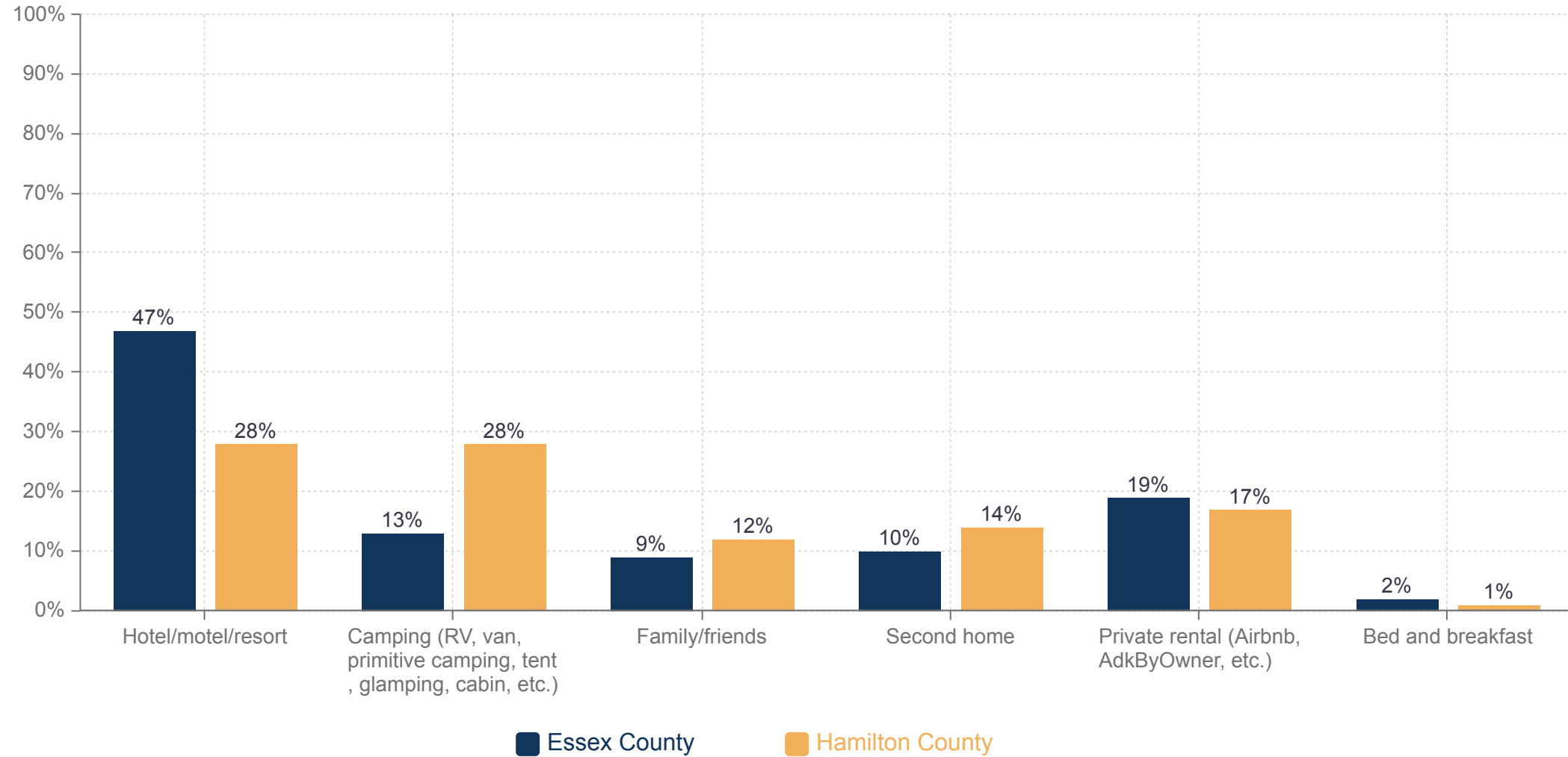
Time of Year Visited

Short term renters



Lodging Accommodations

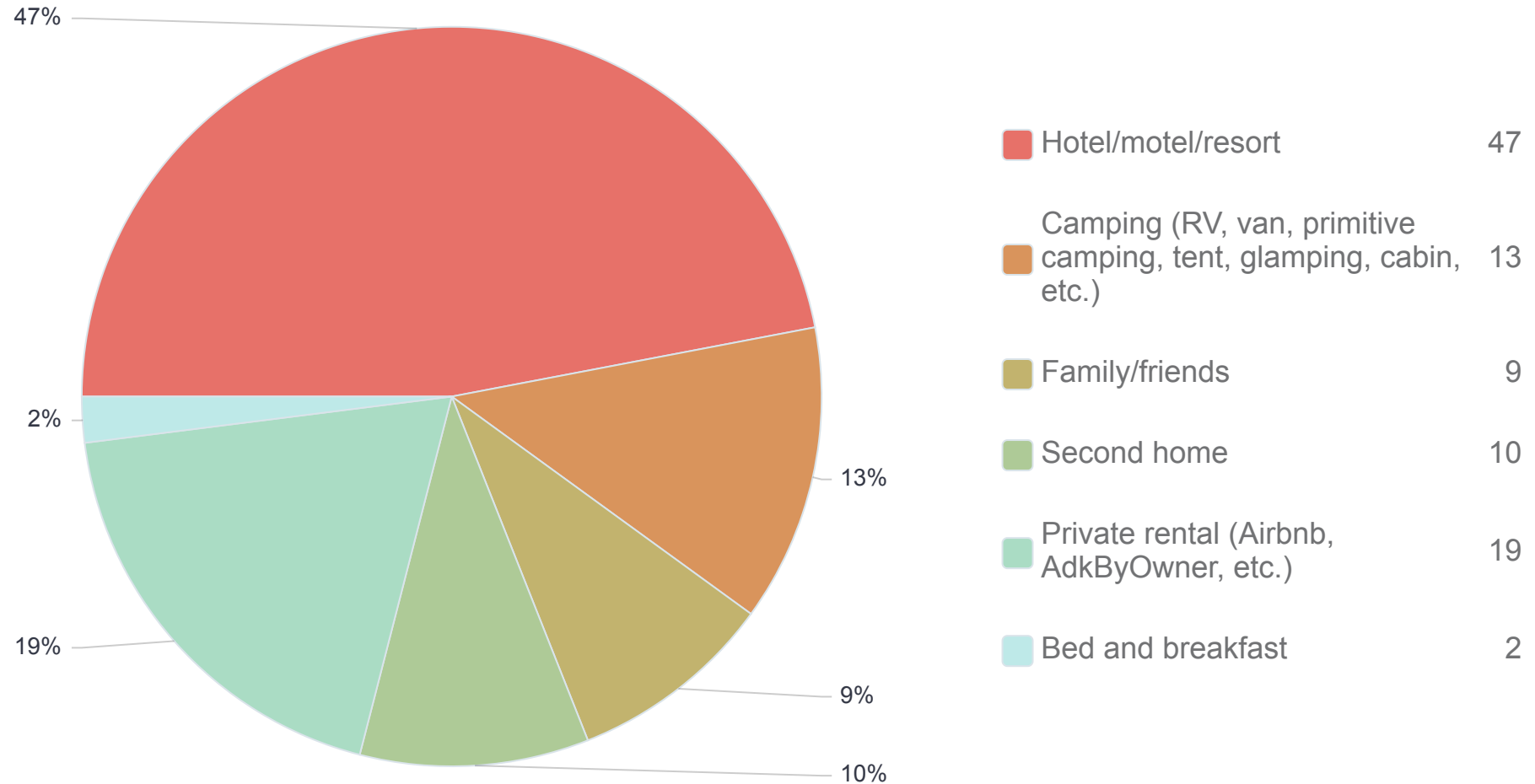
All travelers



Lodging Accommodations

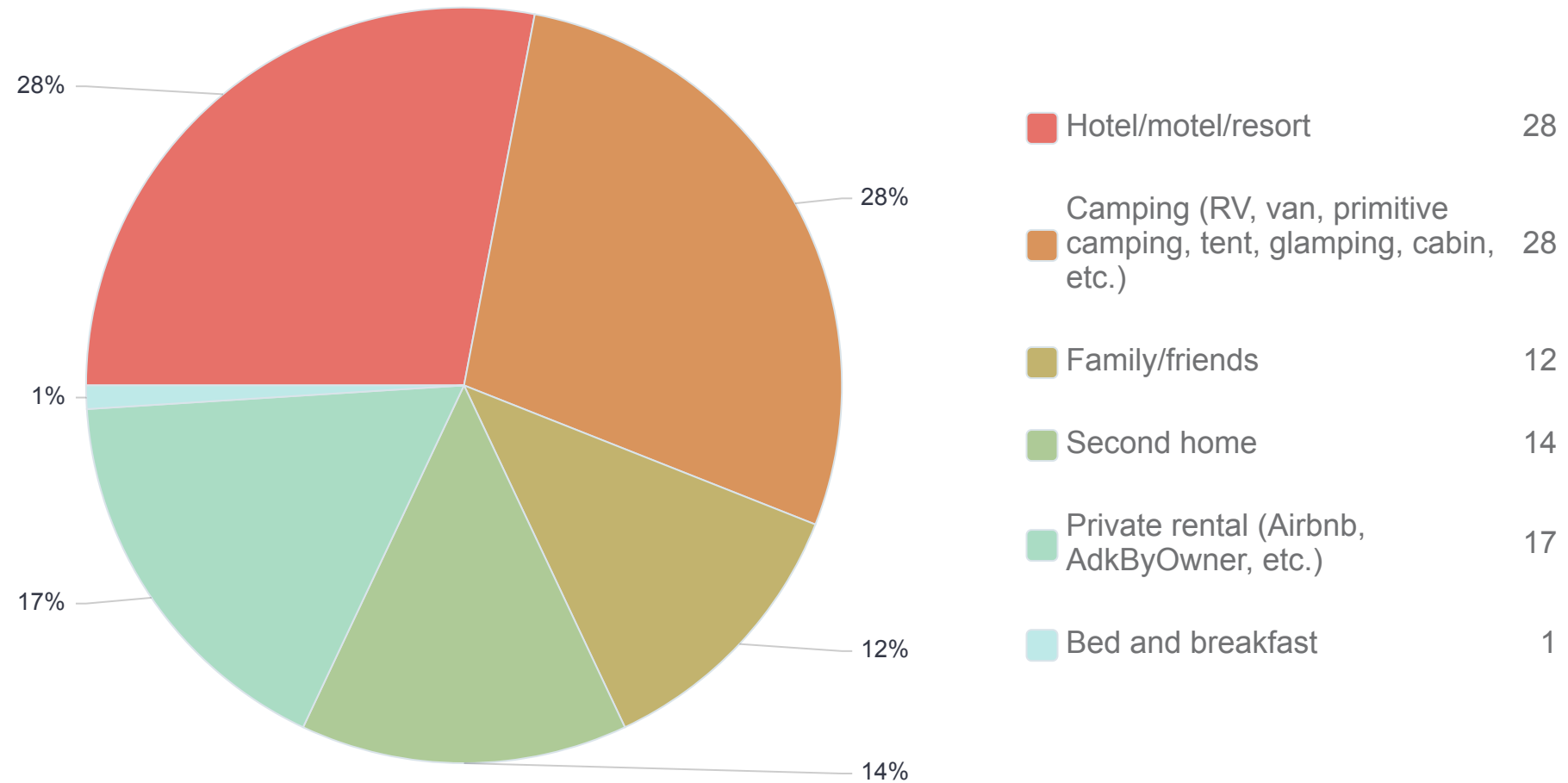
Essex County travelers

47



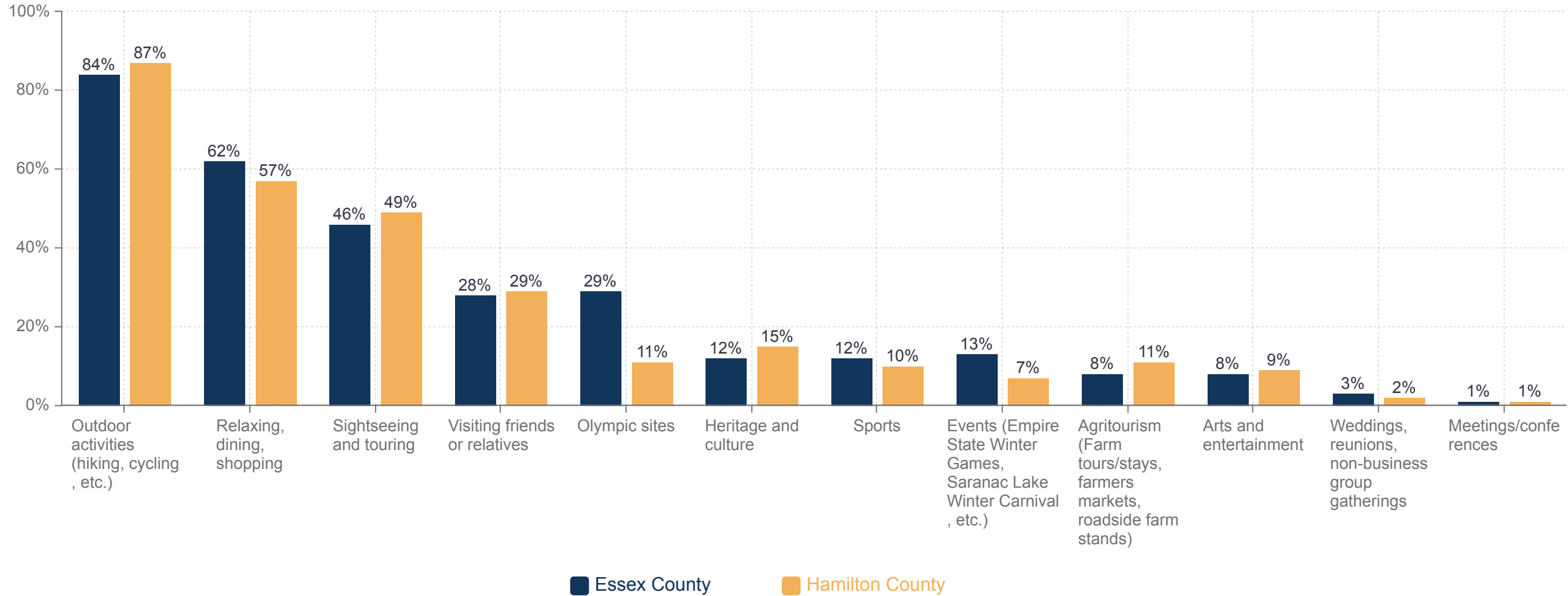
Lodging Accommodations

Hamilton County travelers



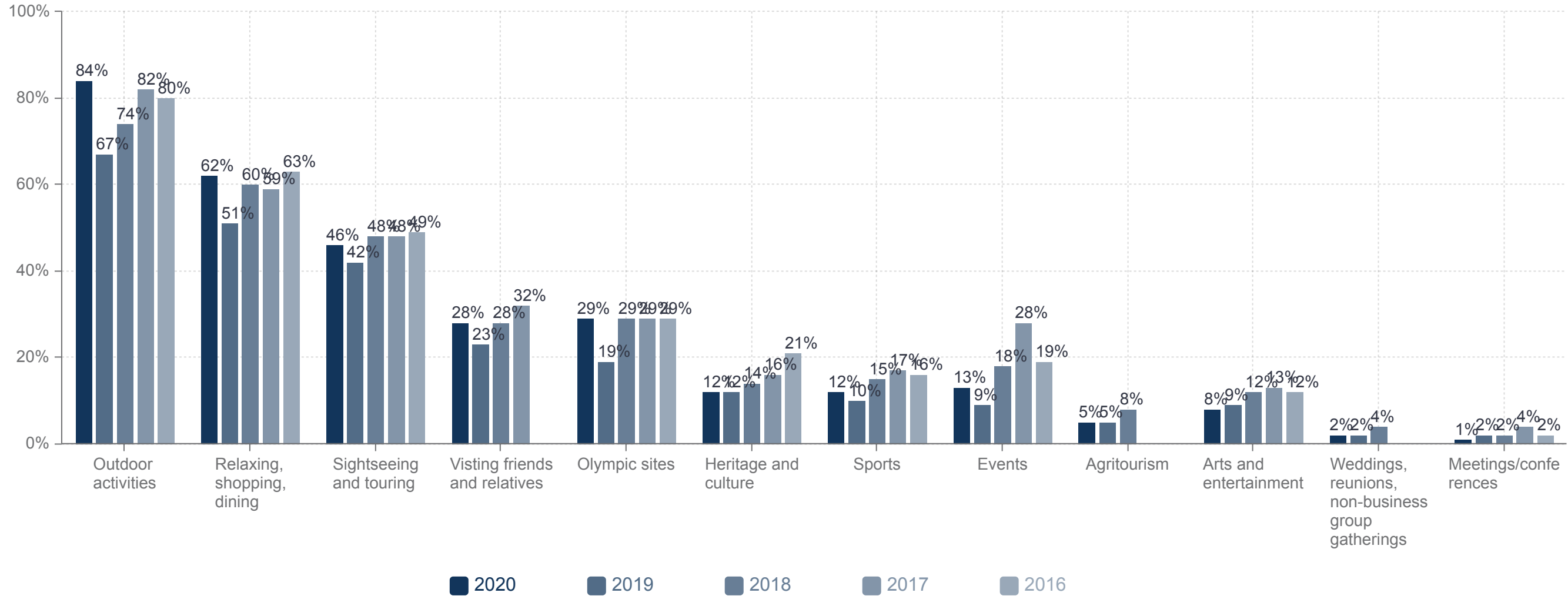
Key Attractions

All travelers



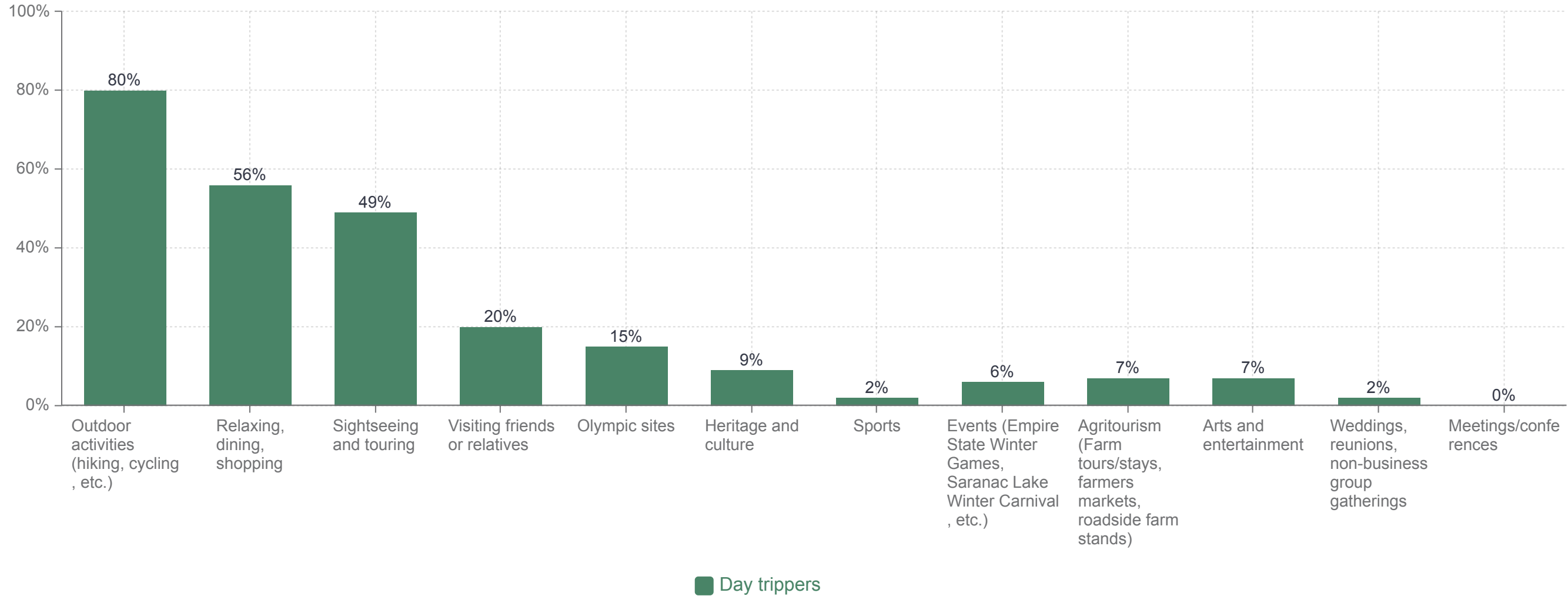
Five Year Key Attractions*

Essex County travelers



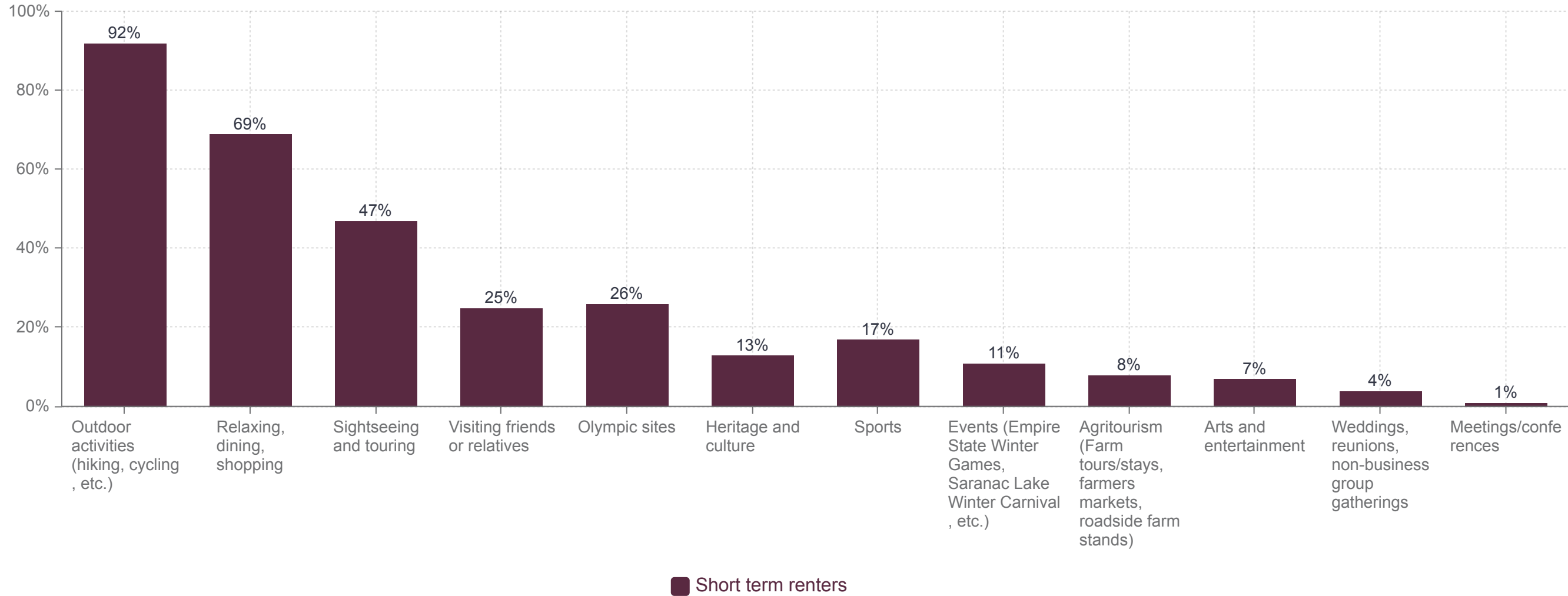
Key Attractions

Day trippers



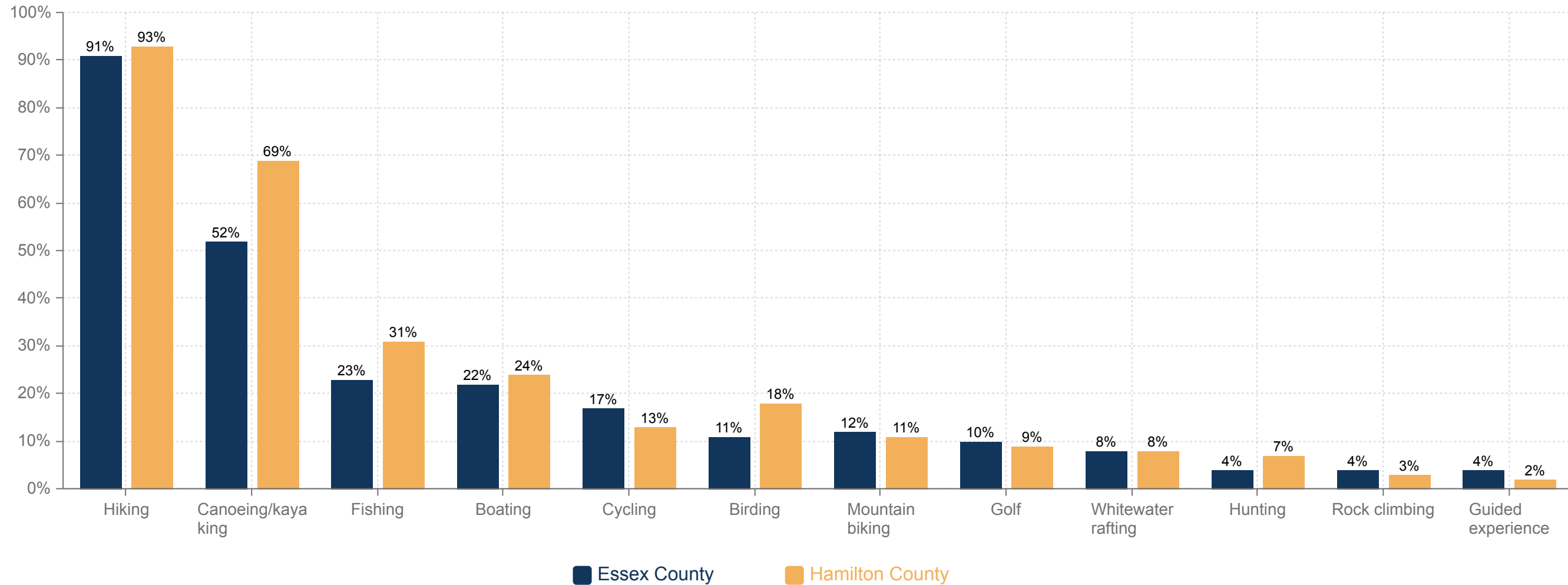
Key Attractions

Short term renters



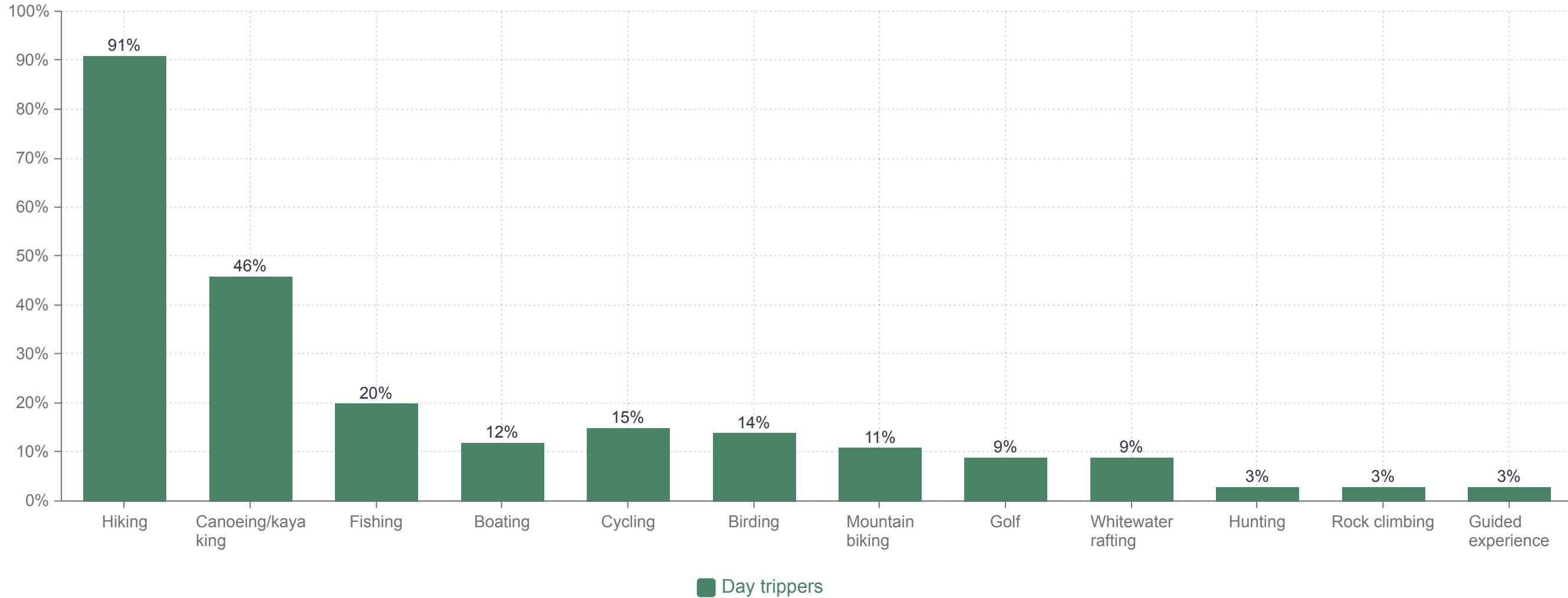
Outdoor Spring/Summer Activities

All travelers



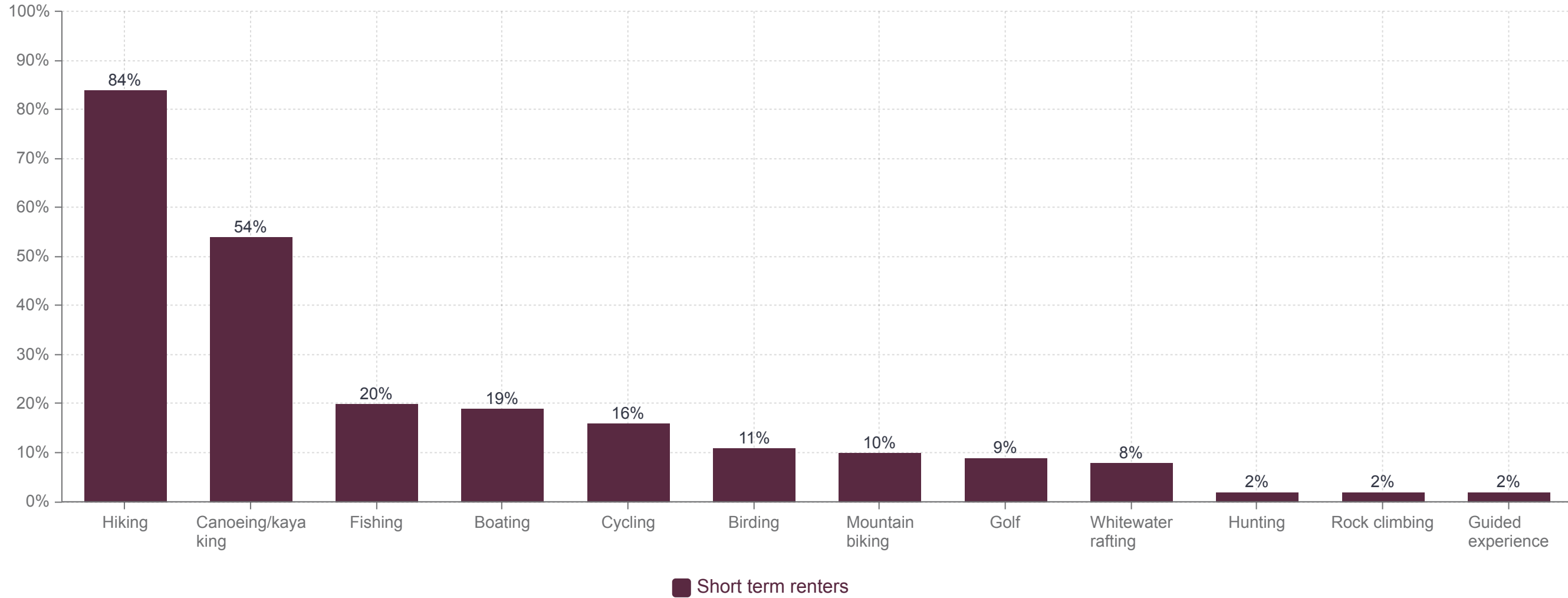
Outdoor Spring/Summer Activities

Day trippers



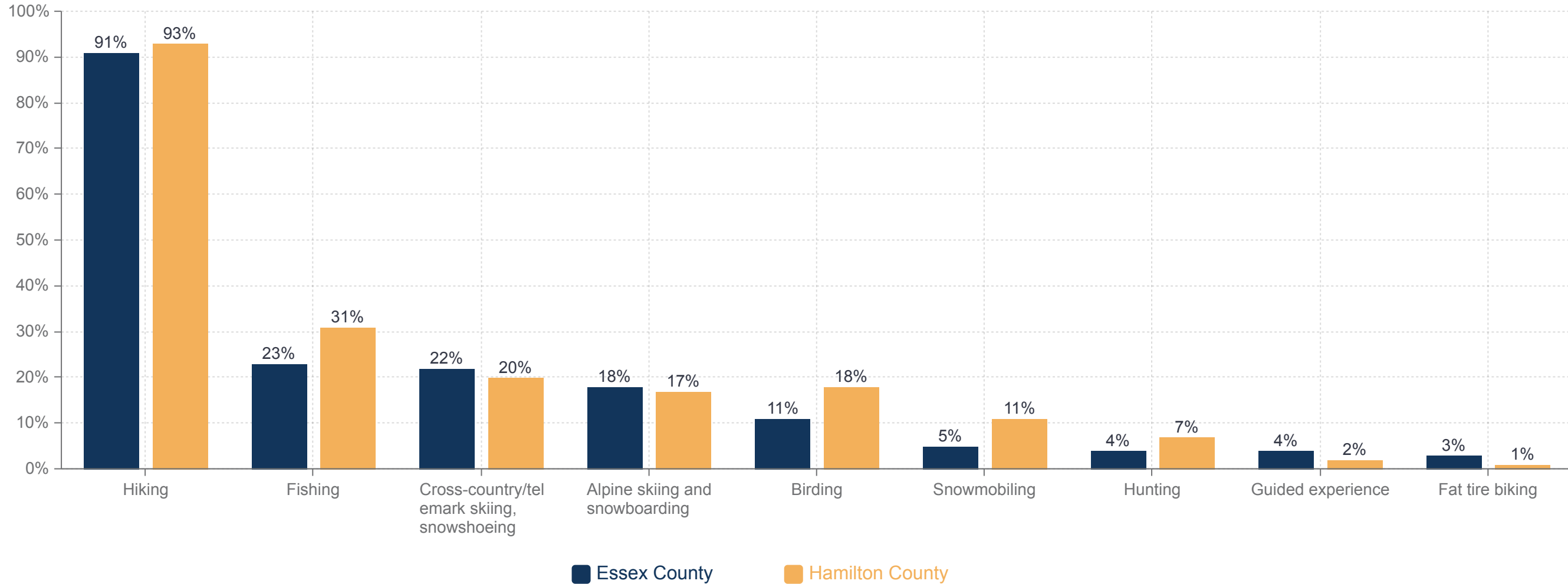
Outdoor Spring / Summer Activities

Short term renters



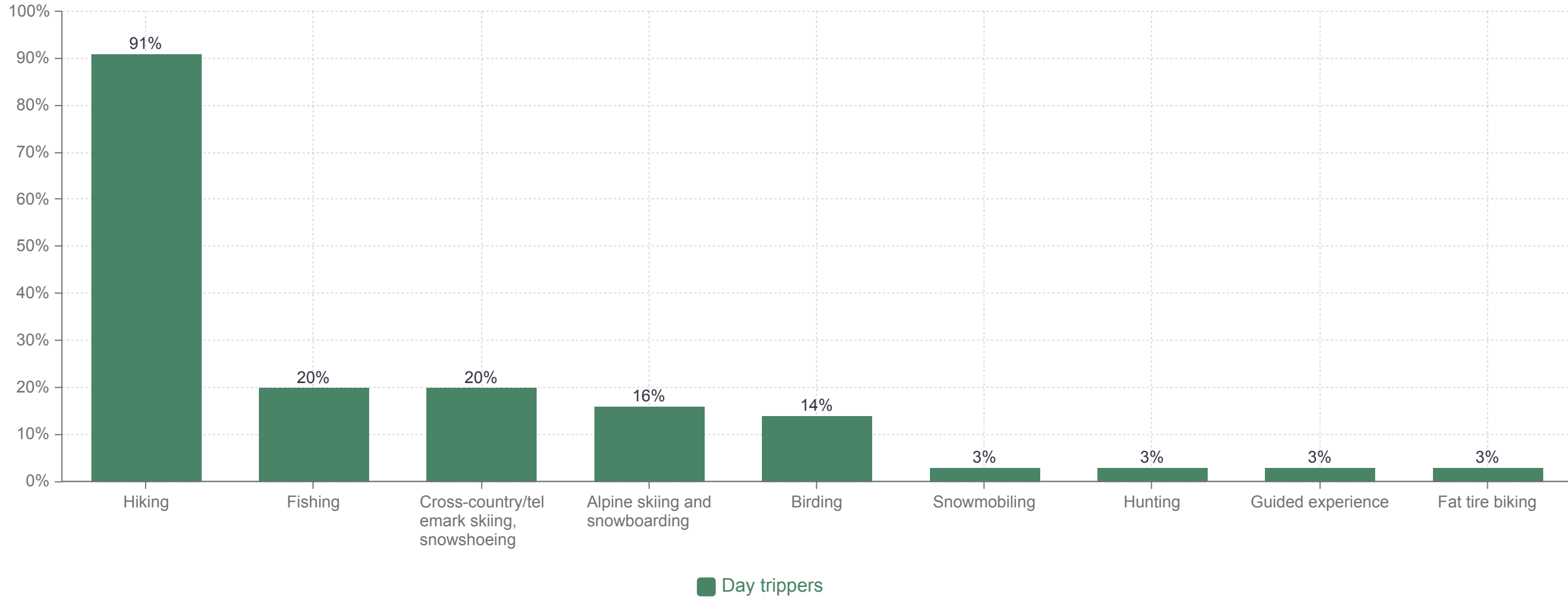
Outdoor Fall/Winter Activities

All travelers



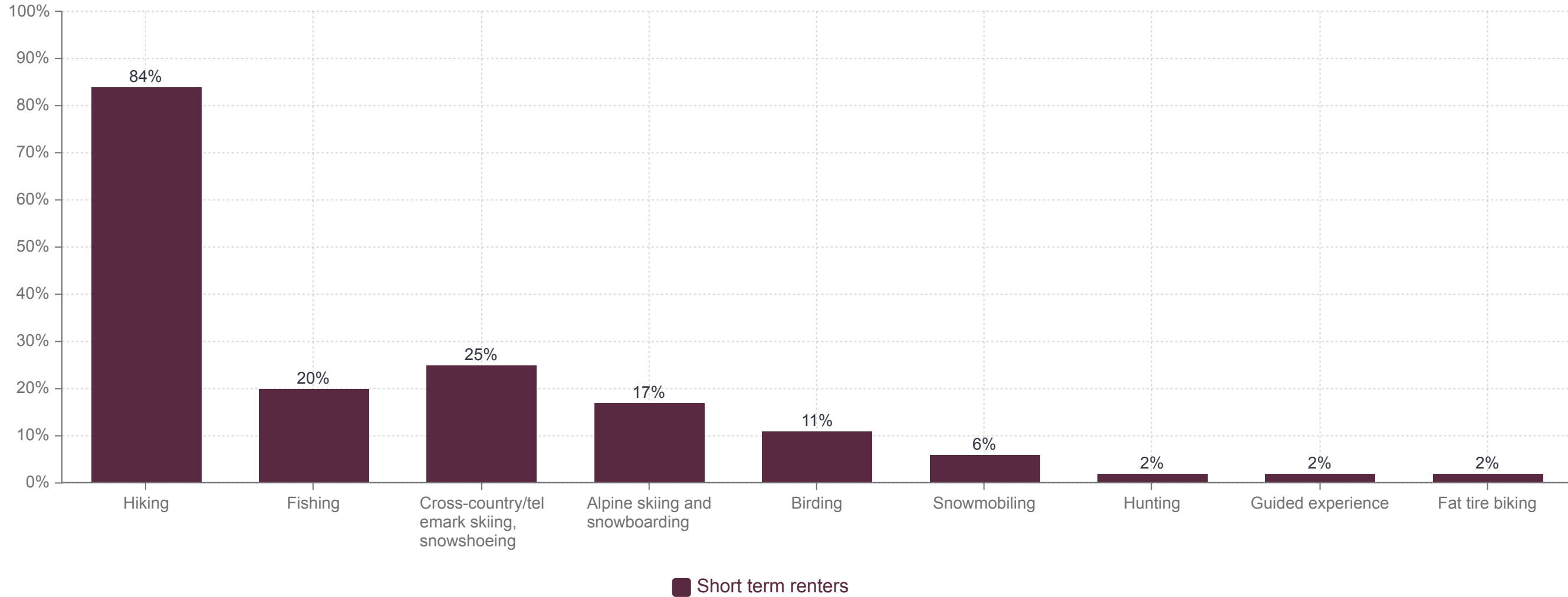
Outdoor Fall/Winter Activities

Day trippers



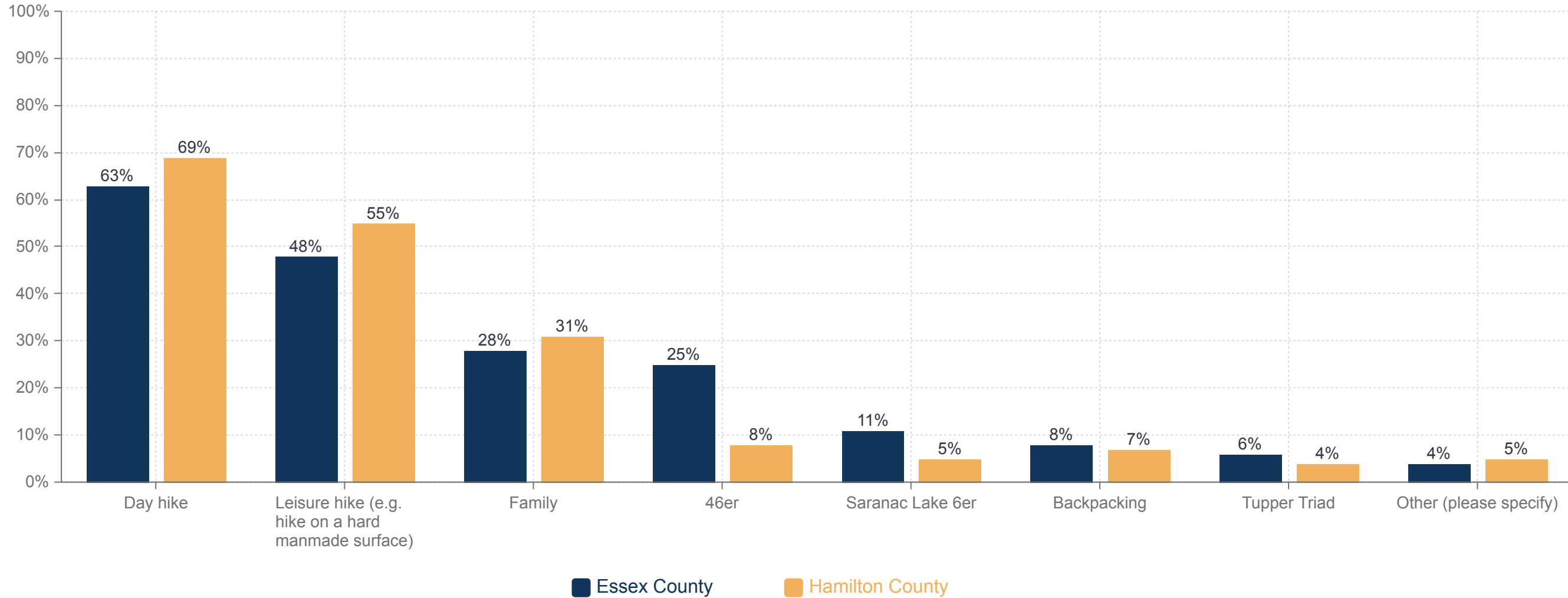
Outdoor Fall/Winter Activities

Short term renters



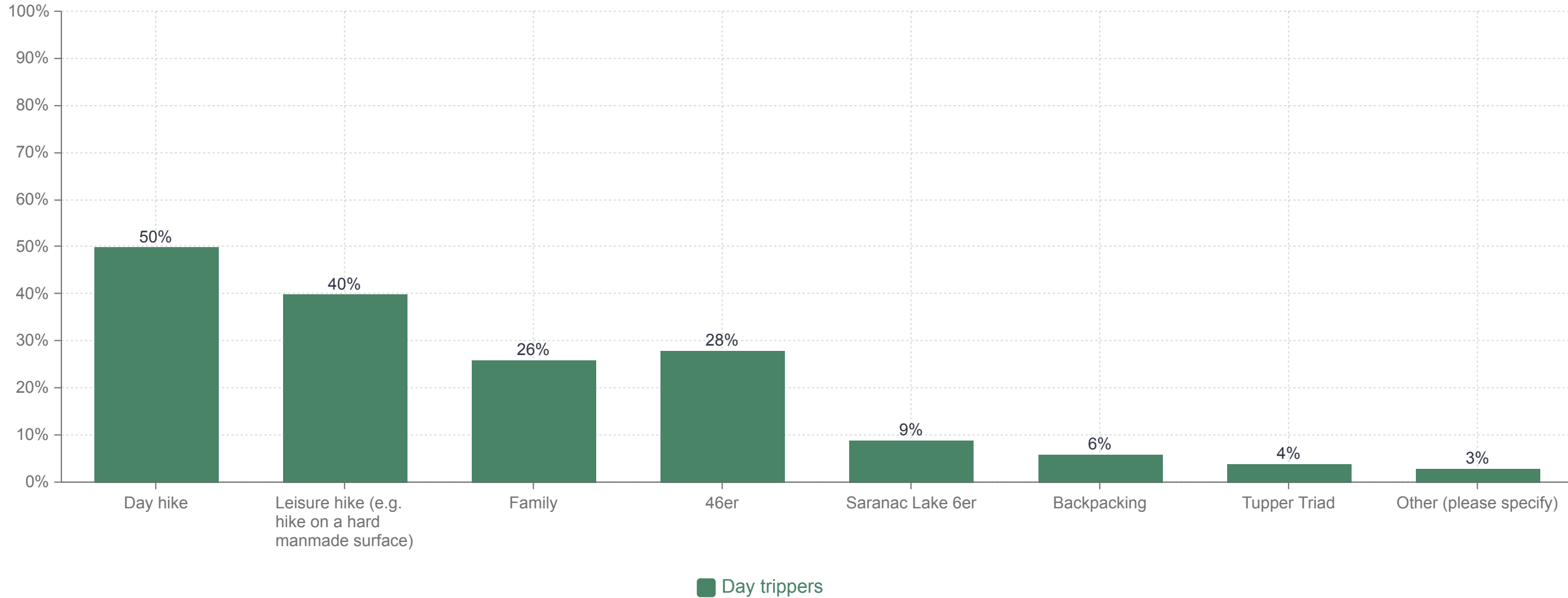
Hiking Breakdown

All travelers



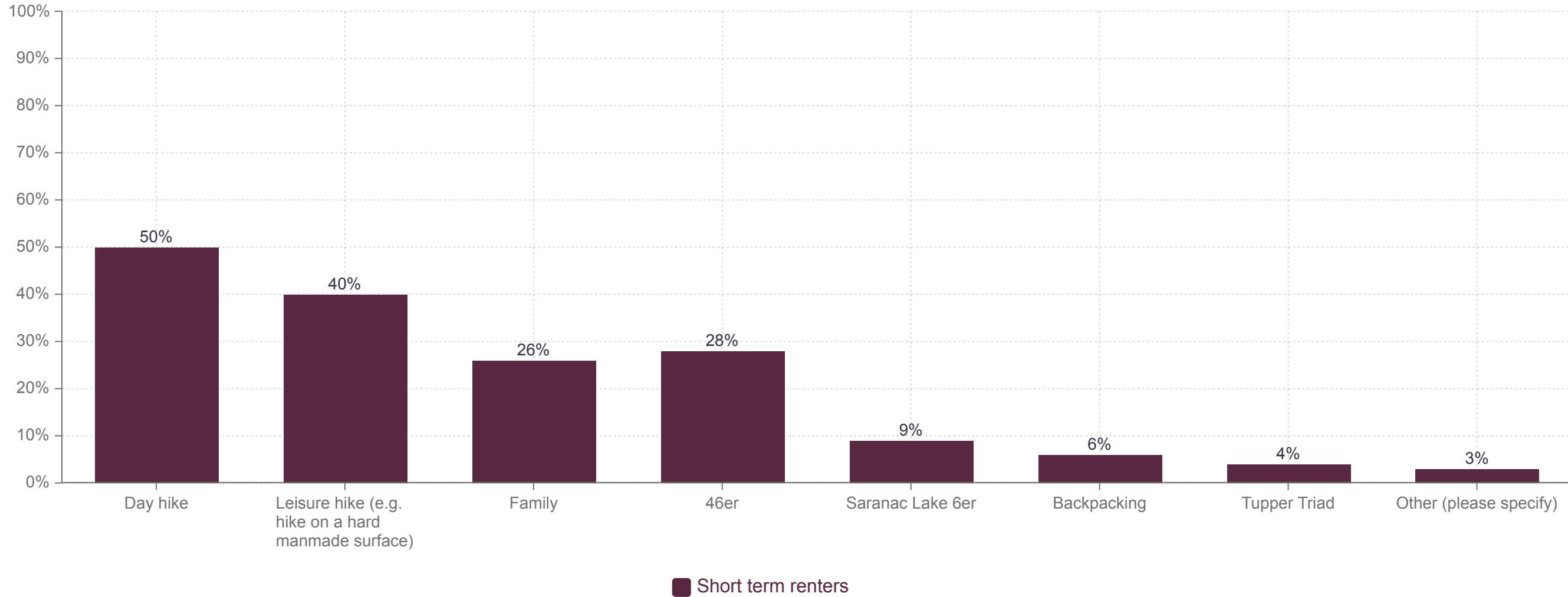
Hiking Breakdown

Day trippers



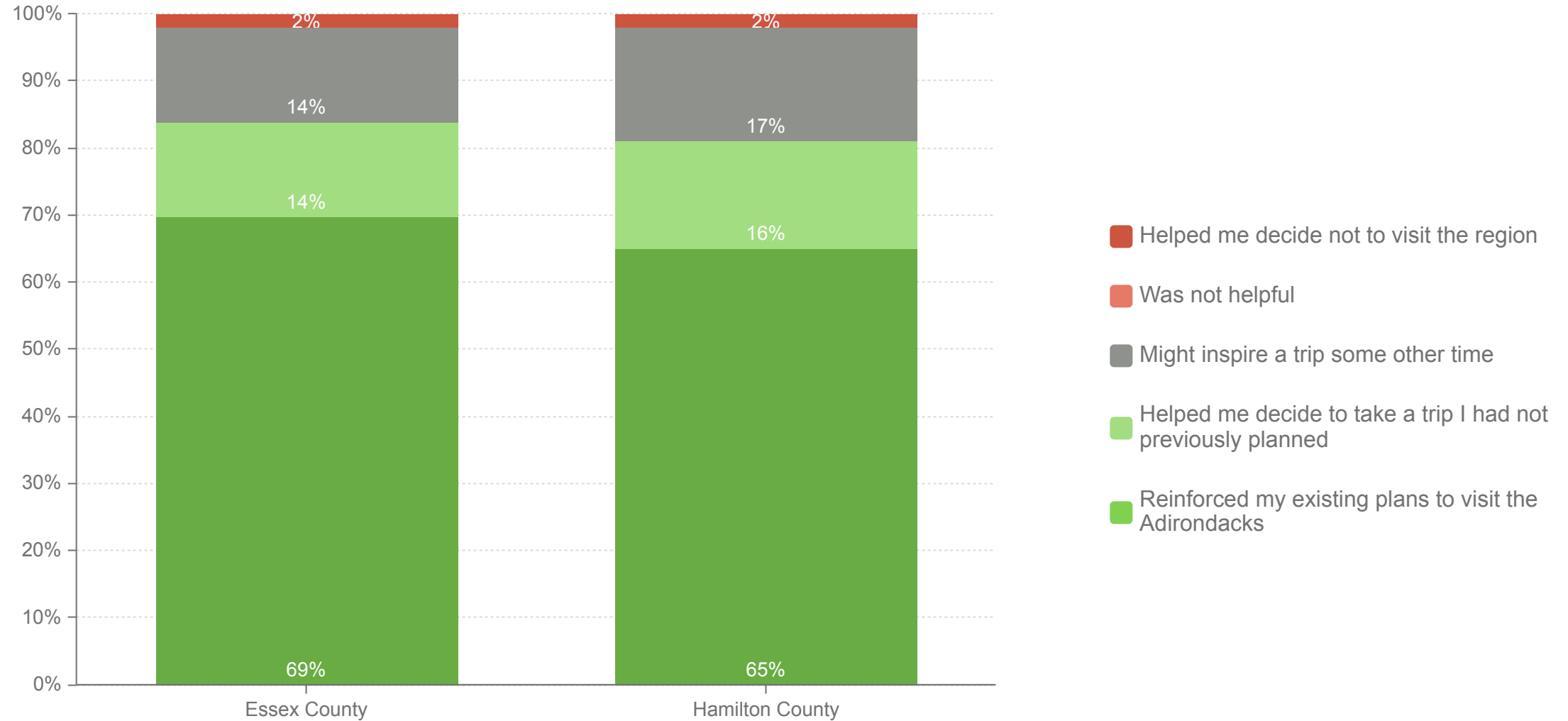
Hiking Breakdown

Short term renters



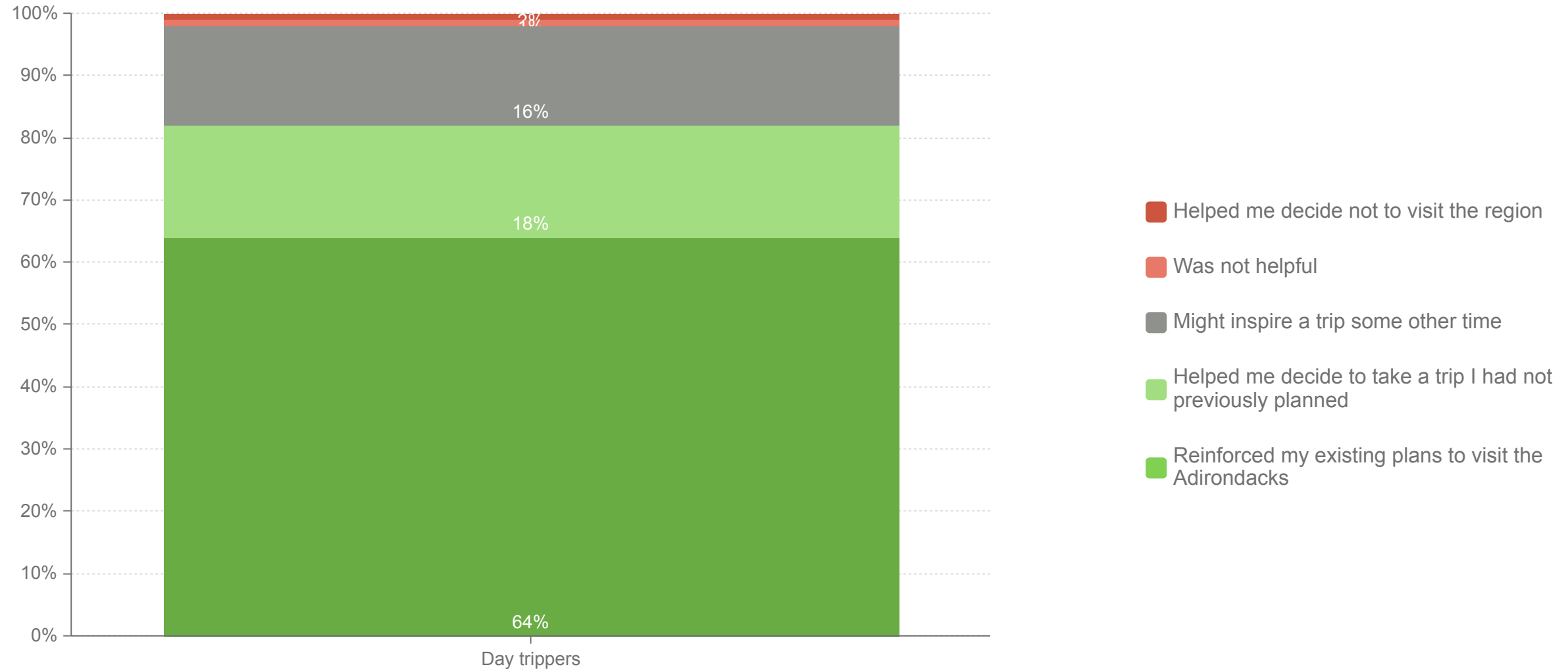
Conversion Rate from Viewing ROOST Marketing Materials

All travelers



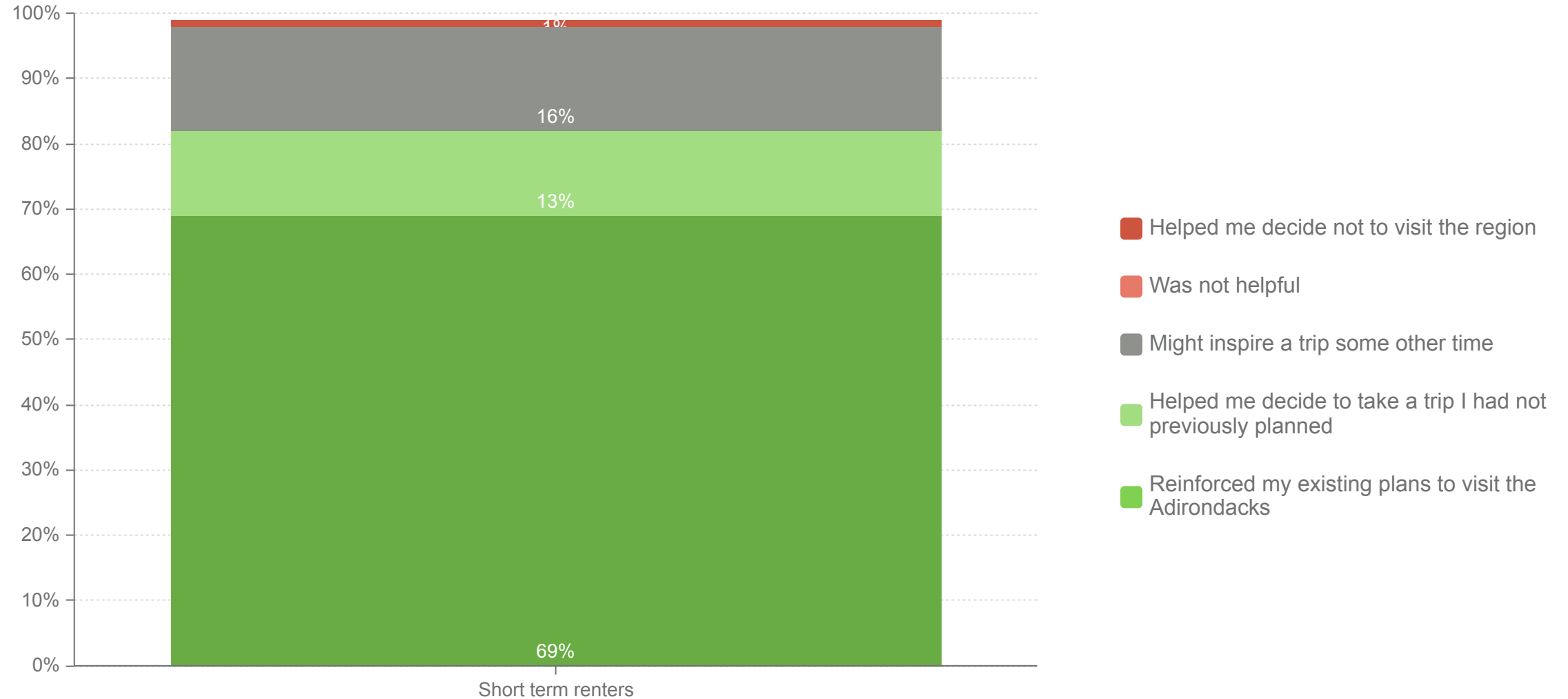
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers



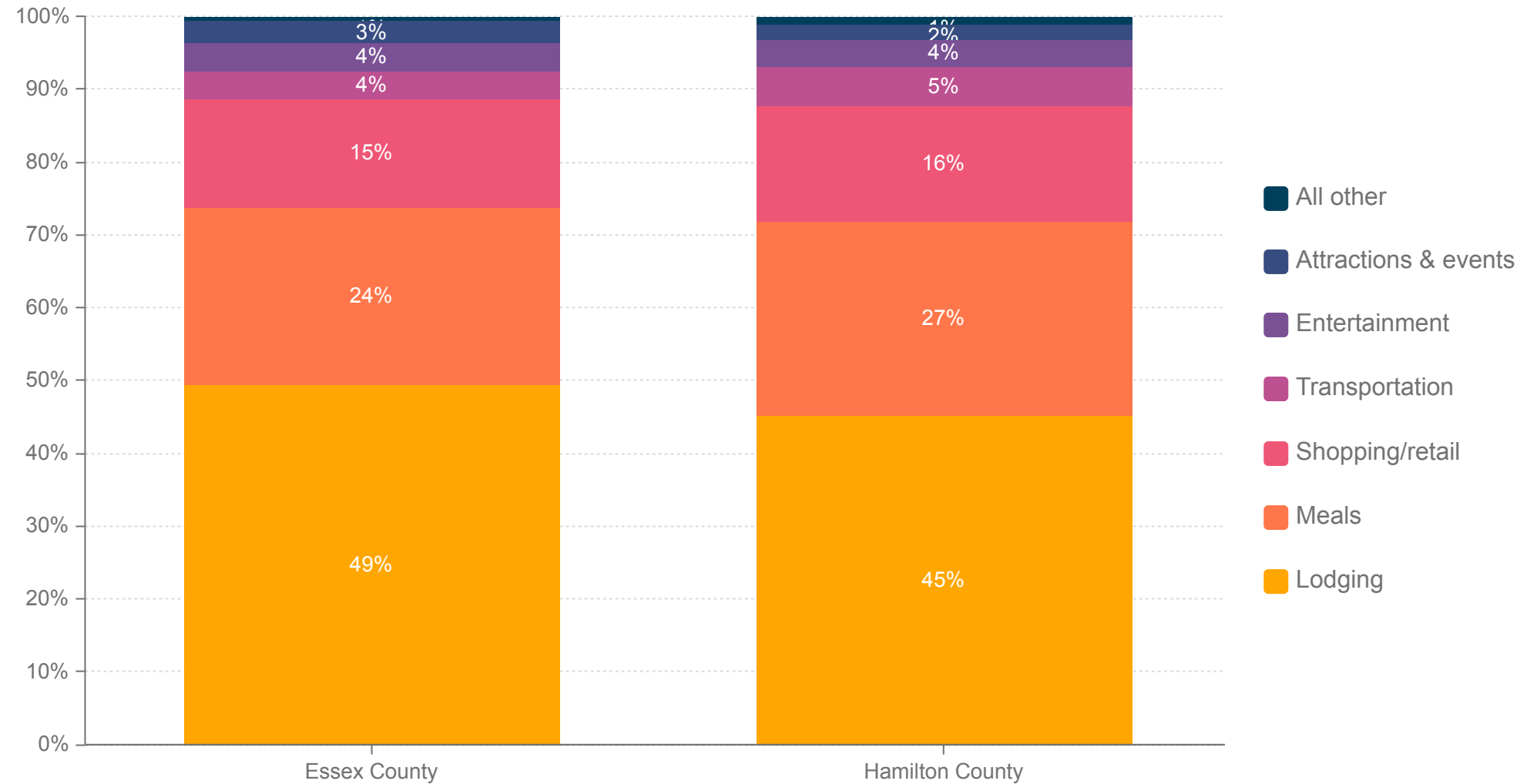
Conversion Rate from Viewing ROOST Marketing Materials

Short term renters



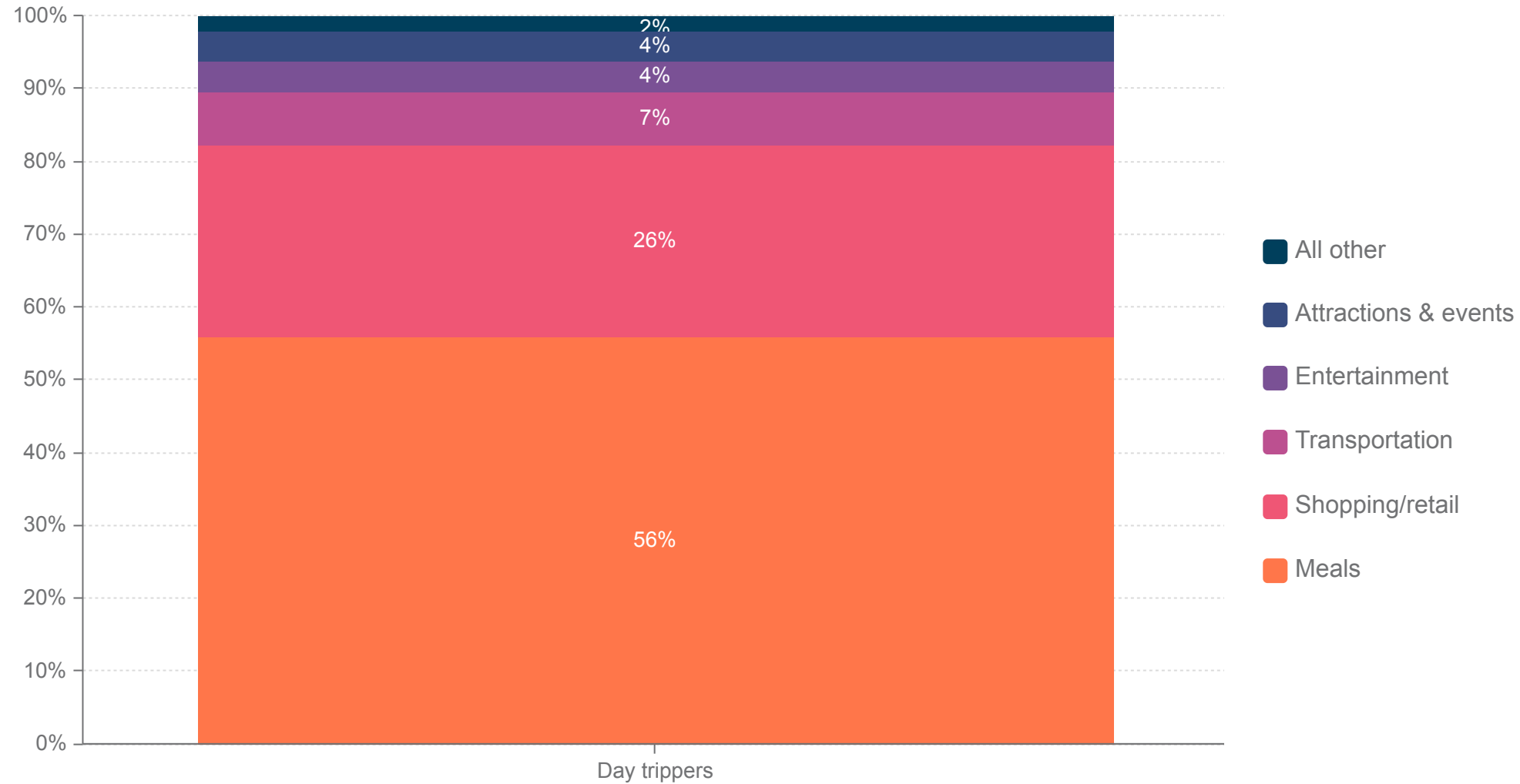
Total Expenditure Allocation by Category

All travelers



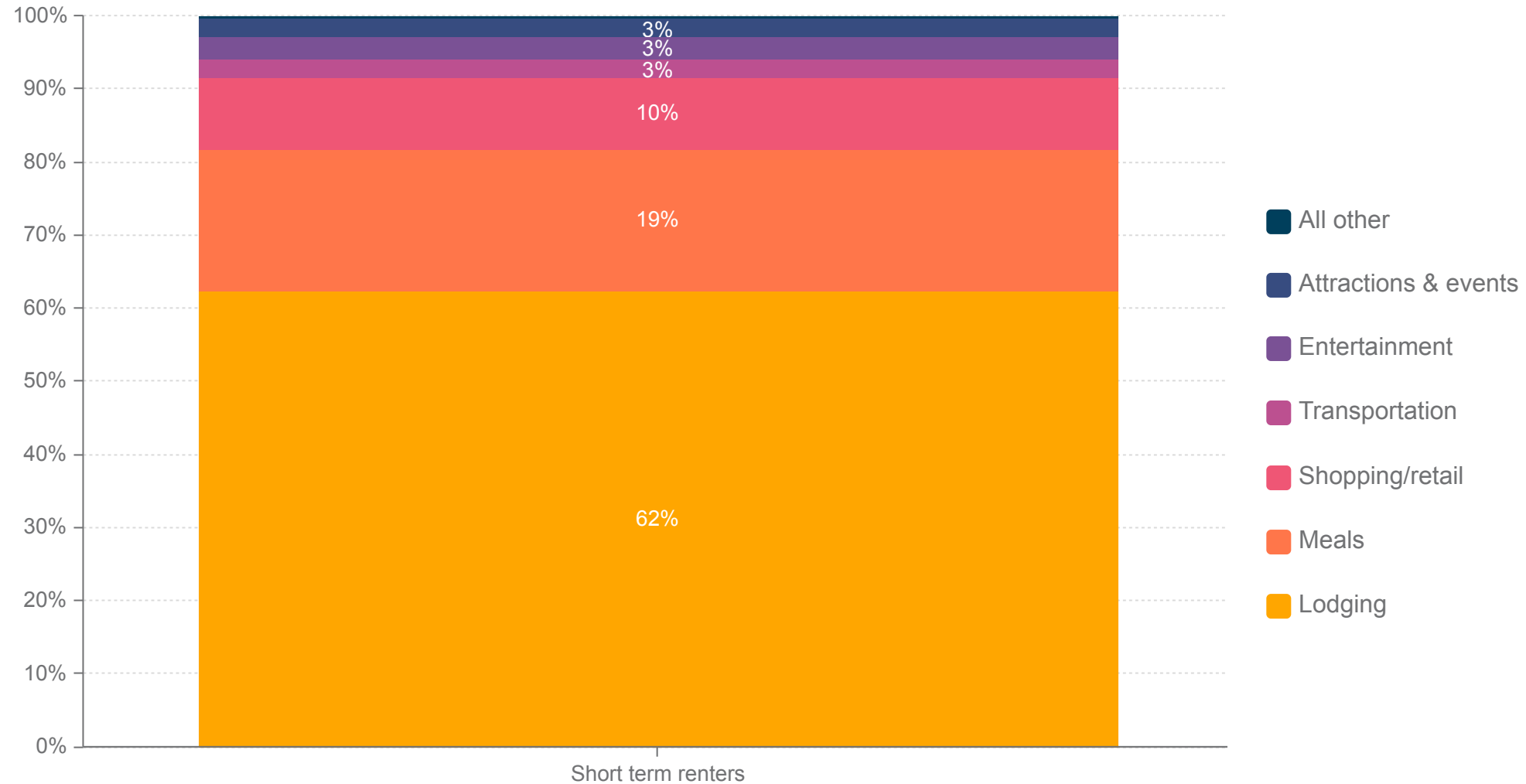
Total Expenditure Allocation by Category

Day trippers



Total Expenditure Allocation by Category

Short term renters



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

Five Year Mean Party Expenditures

Essex County travelers

	Five year average	2020	2019	2018	2017	2016
Attractions & events	\$152	\$57	\$80	\$68	\$57	\$78
Entertainment	\$105	\$67	\$84	\$76	\$59	\$76
Transportation	\$80	\$71	\$87	\$80	\$69	\$92
Lodging	\$492	\$910	\$500	\$470	\$447	\$433
Meals	\$240	\$449	\$245	\$241	\$198	\$226
Shopping/retail	\$152	\$274	\$201	\$164	\$95	\$146
All other	\$53	\$10	\$68	\$52	\$23	\$110
Average daily expenditure	\$369	\$283	\$419	\$415	\$340	\$387
Average total expenditure	\$1,273	\$1,838	\$1,265	\$1,151	\$948	\$1,161

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

Mean Party Expenditures

Short term renters

	Short term renters
Lodging	\$218
Meals	\$68
Shopping/retail	\$34
Attractions & events	\$9
Transportation	\$11
Entertainment	\$9
All other	\$1
Average daily expenditure	\$350
Average total expenditure	\$3,498

Essex County Visitor Profile

An aerial photograph of a large, forested island in a calm lake. The trees on the island are in peak autumn foliage, displaying a mix of bright yellow, orange, and some green. A few small buildings are visible along the shoreline. In the background, rolling mountains are visible under a soft, hazy sky. The word 'ROOST' is overlaid in a large, white, serif font across the center of the island.

ROOST

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adirondacks, usa

Visitor Profile

All Essex County travelers

- Average visitor party age of respondents was 53 years old, remaining close to the five-year average of 54 years.
- The average reported total traveler party size climbed substantially in 2020, to 4 adults and 1 child (from an average of 4 total in years prior).
- Visitation by respondents from New York State jumped to more than three out of four of all reported visitors (79%).
- Central/Western New York visitors comprised the largest group of New Yorkers 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.
- Not surprisingly with the closure of the border in spring 2020, Canadian visitors dropped greatly to only 2% of respondents (from 8%). Similarly, out of state visitation from those outside the Northeast also dropped substantially to only 5% total.

Visitor Profile

All Essex County travelers

- Stay length reported by 2020 travelers also increased greatly from prior years. The average length of stay roughly doubled from average stay length of the past five years to 6.5 nights.
- Hotels/motels remained the most reported lodging choice among 2020 traveler respondents by a high margin (47%).
- Short-term rentals grew in reported use substantially and became the second most common lodging choice used by 19% of respondents. Second home use (10%) and camping (13%) use remained consistent from prior recent years. Respondents reporting staying with family and friends and staying in a bed and breakfast or inn both dropped substantially.
- The most reported attraction to visit the area for many years, outdoor activities, increased substantially with 89% of respondents selecting this draw to visit.

Visitor Profile

All Essex County travelers

- The second most reported attraction to visit the area, “Relaxing, dining and shopping” also gained this year with 62% of respondents selecting this attraction. Both top two attractions showed double digit growth in comparison to prior year. Sightseeing (46%) and Olympic attractions (29%) also demonstrated gains in popular draw to visit.
- 91% 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 and showing pandemic results of overall interest in outdoor recreation. Reported interest in canoeing or kayaking also nearly doubled from prior years with over half (58%) of respondents to this question showing interest in that activity.
- Reported interest in cross-country skiing more than doubled from prior recent years surveying to nearly one-quarter (22%) of respondents who indicated interest in this outdoor activity.

Visitor Profile

All Essex County travelers

- The following were also selected as most popular outdoor activities of interest in descending order: fishing, boating, skiing/boarding, cycling, mountain biking and golf.
- Hiking preferences indicated that the most popular types of hiking continue to be day (63%), leisure/hard surface hiking (48%) and family hikes (28%). All types of hikes, however, indicated greater interest. Forty-sixer level hikes climbed to interest by 28% of respondents, with 11% of respondents indicating interest in Saranac 6er hiking and 6% in the Tupper Triad.
- The average daily traveler party spending in 2020 was estimated at \$283 per day. While this represents a 30% drop in daily spending from prior recent years, it is not indicative of an overall lower spending pattern due to longer stays.

Visitor Profile

All Essex County travelers

- Total estimated trip expenditure was \$1,265, which represents a greater than 30% increase in average overall spending per visitor group. Visitor spending has been increasing for the past five years and this is an even more notable increase.
- Reported spending on lodging (correlated with the average length of stays) nearly doubled from 2019 to 2020.
- Average meals (\$449) and shopping (\$274) also showed substantial increases from recent years of data. All other reported expenditures showed lower average spending amounts, in large part likely due to pandemic closures and health concerns.

Visitor Profile

All Essex County travelers

- 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 83%, just above the five-year average of 81%
- Over 161,000 individuals contacted ROOST via its various outlets for travel information about Essex County 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.

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 sun is visible in the top center, creating a bright, hazy glow.

Hamilton County Visitor Profile

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adirondacks, usa

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.

Day Tripper Visitor Profile

The background image shows a food truck named 'ROOST' at night. The truck is white with large windows. Inside, three people are visible: a person in a dark jacket and hat on the left, a person in a dark jacket and hat in the center holding a drink, and a person in a dark jacket and a white beanie on the right. The truck has a sign that says 'ROOST' in large white letters. Below the name, it says 'REGIONAL OFFICE of SUSTAINABLE TOURISM' and 'adirondacks, usa'. The truck is parked on a wooden deck.

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adirondacks, usa

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.

Short Term Renter Visitor Profile



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Visitor Profile

Short term renters

- 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.

Visitor Profile

Short term renters

- 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.
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Visitor Profile

Short term renters

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

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



Roost

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

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.