

**2021 REGIONAL TRAVELER DATA/  
MARKETING ANALYSIS:  
LAKE PLACID, SARANAC LAKE, TUPPER LAKE,  
ESSEX and HAMILTON COUNTIES, NY-  
ADIRONDACK REGION**



**Prepared by: PlaceMaking  
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Photo credit: ROOST

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## **BACKGROUND**

The Regional Office of Sustainable Tourism (ROOST) managed the marketing tourism assets for Lake Placid in Essex County, Essex and Hamilton County, the Village of Tupper Lake and the Village of Saranac Lake in Franklin County, New York State in 2021. The agency commissioned a study, as it has for the past six years, to determine non-business 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. Regional traveler data and a summary marketing/return on investment (ROI) analysis are provided in this briefing. The data excludes the group and business market segments.

As with data collection for the 2020 year, 2021 continued unprecedented disruptions as a result of the COVID-19 pandemic. As such, the researchers and ROOST recognize the unusual time of visitation and social trends during 2020 and caution against direct comparison to other years of research. During 2021 travel began to rebound, but patterns were still altered substantially due to COVID-19 related impacts on the travel industry.

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 2021 non-business travelers to Essex and 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 visitors who spent most of their time in the region.

The end-product of this research includes detailed visitor information, estimated traveler expenditures and analysis, and an estimated return on investment (ROI) for county-level marketing expenditures. ROOST measured a total of 370,016 traceable leads who were interested in visiting the region in 2021. PlaceMaking also compiled similar research for Essex and Hamilton counties individually, which are available under separate cover.

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## **METHODOLOGY**

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the tenth year. The study has employed similar methodology with comparable results for 18 years. The survey instrument was designed collaboratively by PlaceMaking and ROOST to gather information from its non-business travelers and to measure regionally the return on investment of marketing expenditures.

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Survey results are parsed by where the traveler indicated spending the most time to achieve individual county level results; these results are analyzed together as the basis for this report. 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 over time.

The survey was distributed electronically by ROOST to a sampling of its electronic database of visitors or parties inquiring about visitation to Essex County during 2021. Surveys were collected quarterly this year throughout 2021, a new manner of timely data collection. Within the month following each travel quarter, the survey was delivered electronically to a sampling of visitors who had inquired about traveling during that period. This manner of collection allows surveys to be modified slightly by seasonal activities and particularly to improve trip data recollection nearest to actual date of travel.

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, Facebook, YouTube and Instagram), website, printed materials and in-person visits. This study does not take into consideration the potentially large group of individuals who 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 national and regional research with a similar purpose and refined based on the experience of tourism professionals. 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 75,248 invitations were sent by ROOST successfully through electronic mail to regional visitors. Of this group, 6,161 responses were received for an 8.2% response rate. Of this, just over 950 responses were received by an additional Facebook post.

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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## **SUMMARY TRAVELER DATA**

Highlights of 2021 visitation to the region included:

### **Demographics and Visit Information**

- Average traveler party age of respondents was 58 years old, slightly older than the five-year average and in prior year findings.
- The average reported total traveler party size was 3 adults and 0.7 child, for a total of 3.7 persons. This represents a significantly smaller average party size than in 2020.
- Respondents included 60% females, 40% male.
- Ninety-five percent (95%) of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American and Hispanic, less than 1% African American, 2% mixed race and 1% Asian.
- Reported visitation by respondents from New York State fell somewhat to less than 3 out of 4 visitors (74%) from a high of 78% in 2020.
- Northern NY visitors comprised the greatest group of these at 37%. Western NYS visitors (29%) were the next most commonly reported region visitors.
- Northeastern state visitors outside of NYS rose slightly to 18% of respondents and visitors reporting from states outside the northeast rose slightly to 7%.
- Not surprisingly as a result of the border closing in spring 2020, Canadian visitors remained low at less than 1% of respondents.
- Stay length reported by 2021 travelers decreased substantially from 2020 to 3.4 nights (from 6.7 nights in the first year of the pandemic- 2020). This is much closer to the 5-year average length reported stay.
- Peak fall visitation in September/October (30%) climbed to exceed summer visitation in July/August (26%) for the first year of record. May/June (16%),

January/February (10%), March/April (9%) and November/December (8%) stayed fairly consistent from prior years.

- Hotels/motels remained the most reported lodging choice among 2021 traveler respondents (38%), but slightly lower than in recent years (5- year average is 42%).
- The next most reported lodging choices are very close in numbers, with 16% reporting private home rentals, 15% each reporting staying with family and friends and camping/RV, and 14% staying in private homes. These figures are close to recent years.

### **Interests**

- The most reported attraction to visit the region continued to be outdoor activities, with 62% of respondents selecting this draw to visit.
- “Relaxing, dining and shopping” remained another frequently expressed reason to visit the area by 56% of respondents. Sightseeing (44%) and visiting friends (25%) rounded out the top four areas of interest. Twelve percent (12%) of respondents reported visiting Olympic sites and 9% visiting heritage sites as attractions.
- Seventy-nine percent (79%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (34%), followed by fishing (21%).
- Boating was expressed as an outdoor activity of interest in 17% of respondents, while cross country skiing/snowshoeing and cycling were reported by 8% of respondents. Six percent (6%) of respondents also indicated that skiing/boardings was of interest.
- A question regarding hiking preferences continues to indicate a strong preference in casual hiking, with 69% of respondents indicating interest in day hikes, 33% leisure and hard surface hiking and 28% family hikes. Forty-sixer level hikes dropped somewhat in interest from 21% to 12% of respondents from 2020 to 2021. The expressed interest in other specific hiking quests

(Saranac Lake Sixers and Tupper Lake Triad) also dropped from 2020 responses.

### **Traveler Spending and Conversion**

- Expenditure levels declined in comparison with 2020, however as noted, the 2020 travel year was an extreme anomaly due to long average stays and the overall pandemic social disruption. The average daily traveler party spending in 2021 was estimated at \$421 per day. This is a high for recent years of data collection.
- The total estimated reported trip expenditure was \$1,390. Visitor spending has been increasing for the past five years, including an even larger spike during 2020 due substantially to longer stays.
- Reported spending on lodging (\$636) and meals (\$267) continued well above 5-year averages.
- Reported shopping (\$203), entertainment (\$77) and attraction/events (\$73) expenditures all were well above 5-year averages, adding to the overall strong expenditure profile.
- 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 80%, slightly lower than the 5-year average of 81%.
- Over 211,000 individuals contacted ROOST via its various outlets for travel information about the region in 2021. This represents an approximately doubling of contacts from the prior year and near record level.

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### **ESTIMATED TRAVELERS**

The 2020 estimated traveler count is tabulated by multiplying the number of *traceable* leads generated by ROOST (those who contacted their office during 2020 for information through all sources) by the conversion factor and by the average party size (determined by the survey).

*211,930 (direct leads) X 80% (gross conversion factor) x 3.5 (average party size)*

*Estimated travelers in 2020 = 593,404*

The number of travelers who were influenced by ROOST in visiting the region in 2021 is estimated at just under 600,000.

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## RETURN ON INVESTMENT

Researchers measured return on investment (ROI) by estimating expenditures generated by direct expenditures of travelers and divided by the total marketing dollars spent by the agency.

The first step in this process is to estimate total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials. This is done by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures and length of stay:

*211,930 (number of direct, traceable inquiries) x 80% (gross conversion factor) x \$421 (mean traveler party expenditure per day) x 3.4 (mean length of stay in nights)*

*= \$242,685,282*

*(total estimated revenue generated by travelers influenced by ROOST in 2021)*

The second step in this process is to divide the total revenue generated by travelers by the marketing dollars spent by the total ROOST marketing budget:

*\$242,685,282 (total estimated traveler revenue) / \$3,232,178 (total ROOST marketing expenditures)*

*Return on Investment (ROI) = 75:1*

The above calculations show that the total estimated revenue generated by travelers touched by ROOST was nearly \$243 million in 2021, a nearly 6% increase from 2020 to 2021 estimates. This produces a conservatively- estimated ROI of \$75 in leisure traveler-related revenue for every marketing dollar expenditure. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would be a much greater impact.

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## CONCLUSIONS

The COVID-19 pandemic continued through 2021, with continued shifts in all societal patterns, including leisure travel. ROOST played a key leading role in promoting more localized tourism and return to broader markets with safety policies such as masking even on outdoor main streets. ROOST worked with its many tourism assets and hospitality partners to assist re-opening and serving a COVID-19 tourism population that was visiting the region.

2021 showed a return toward more typical visitor patterns, with the large exception of near absence of Canadian visitors due to border restrictions. While certain markets such as sports tournaments/events and group meetings were limited, family and extended family trips continued to be popular. The region continued to rebound quickly, ahead of many other national markets.

Overall occupancies saw a recovery during 2021, although not to 2019 levels. Full recovery is anticipated during 2022. A bright spot is that the average daily rate (ADR) charged by lodging facilities increased an additional 14.7% during 2021 after a 9% increase in 2020<sup>1</sup> for Essex County where this is measured specifically. This substantiates the trend of reported higher lodging expenditures seen in the survey and emphasizes real revenue growth and potential.

A return toward visitors from areas further afield than NY state occurred during 2021 which is an encouraging trend to monitor in future years. The extremely long stays on average reported from 2020 declined to a much more typical length of stay in 2021. Similarly, the average party size reported in 2021 also dropped back to more typical levels. The 2020 "COVID-pod" travel of larger groups appears to have shifted back to more normal smaller family or friend groups. Short-term rentals continued to be a strong portion of visit accommodations.

Although overall expenditures dropped due primarily to shorter stays, nearly all *daily* expenditure categories reported all-time highs. Daily expenditure levels, particularly in key areas of lodging and meals, have been on a steady growth trend even before recent months of inflation. This is a strong point for regional economic impact now and in the future.

The U.S. Travel Association<sup>3</sup> calculated domestic travel growth nationwide for 2021 over 2020 levels, but which were far lower than 2019 (pre-pandemic). The leisure market was estimated to have improved by approximately 12% from 2020 but still



well below 2019 levels. Business and international travel are still far below domestic leisure travel rates.

Much longer average stay durations were another pandemic reported occurrence. During the past 5 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 were able to work remotely and stay with their families out of town.

Average reported lodging and meal expenditures rose to a record high through this research, most likely attributed to the increased length of stay. It remains to be seen if these expenditure levels remain high in future years as the world recovers from the COVID-19 pandemic.

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 occurred 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%.

ROOST marketing expenditures rose in 2021 to meet the recovering visitor market. The resulting ROI dropped from prior recent years, however this is deemed as a recovery year, with visitation to rebound (likely fully) during 2022. The estimated return on investment from dollars generated per marketing dollars spent depicts a robust 75:1. This is slightly higher than in recent years and the five-year average.

The research team continues to discuss the broader impact of regional tourism on visitor assets and areas by which to expand traveler data collection accordingly. Considering the global pandemic, these data show a bright spot for economic recovery in the tourism industry in the region in 2021 and beyond.

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 gain.

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 strategies and future growth. These data can be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency.

All social patterns were highly disrupted during 2020 and 2021 by the COVID-19 pandemic, with travel being no exception. Therefore, it is important to be cognizant that direct comparisons of the results of this year's data to other years should proceed cautiously.

The study at a regional level provides a benchmark in measuring ROI on marketing investments for the two-county region. It may also enhance and improve evaluation of future marketing efforts, techniques, and marketing channels for 2022 visitors and beyond.

## SOURCES CITED

1. Smith Travel Research, Inc. (property of Lake Placid CVB)- "Trend Report Essex County NY". 2022.
2. Air DNA. "COVID-19 Short Term Rental Data". [www.Airdna.co/covid-19-data-center](http://www.Airdna.co/covid-19-data-center) February 2021
3. U.S. Travel Association. "Travel- the Hardest Hit U.S. Industry". [ustravel.org](http://ustravel.org) 3/31/21

**TABLE 1. 5-YEAR SUMMARY TABLE OF KEY REGIONAL ROI DATA**

	<b>5-Year Average*</b>	<b>2021</b>	<b>2020</b>	<b>2019*</b>	<b>2018*</b>	<b>2017*</b>
Number of Completed Survey Responses	4,574	6,161	3,593	4,449	3,339	5,345
Median Income of Respondents (by \$10,000 range)	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Mean Age of Respondents	55	58	53	56	55	53
Direct Inquiries to ROOST for Region	219,680	211,930	168,089	367,288	319,976	311,171
Average Night Stays/ Party	3.8 Nights	3.4 Nights	6.7 Nights	3.1 Nights	3 Nights	3 Nights
Average Party Size	4 Persons	3.7 Persons	5 Persons	3.5 Persons	4.1 Persons	3.94 Persons
Conversion Factor Rate	80%	80%	82%	807%	77%	79%

Average Daily Expenditure per Party	\$354	\$421	\$283	\$383	\$358	\$326
Average Total Expenditure per Party per Trip	\$1,268	\$1,390	\$1,667	\$1,191	\$1,151	\$943
Occupancy Tax Marketing Budget	\$3,868,948	\$3,232,178	\$3,266,422	\$4,512,724	\$4,444,201	\$3,889,219
ROI	72:1	75:1	70:1	74:1	73:1	70:1
*Data from 2016-2019 also included Franklin County visitors						