

Analysis of 2021 Day Trip Travelers and Short-Term Renters to the Adirondack Region of Essex and Hamilton Counties



ROOST

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BACKGROUND

The Regional Office of Sustainable Tourism (ROOST) managed the marketing tourism assets for the Essex and Hamilton Counties as well as Tupper Lake and the Village of Saranac Lake in Franklin County, New York State in 2021. The agency commissioned a study to determine leisure traveler information at the county levels and to gauge key regional marketing program statistics. ROOST contracted with PlaceMaking, a regional community/ economic development research firm, to complete this research.

ROOST sent a jointly created survey tool to a sample of its 2021 leisure travelers to Essex and Hamilton counties. The agency requested visitors to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from those who visited the region. The survey was sent out following the end of each quarter of 2021 and results aggregated for the year.

The number of potential visitors who inquired about travel to the region in 2021 and provided contact information (traceable leads) was 211,930. Traceable leads do not include the larger audience that could also be influenced by promotional material for the region suggesting that the leads represent a conservative number on which to base study results.

Over 6,100 (6,161) visitors responded to the survey that they had visited the region in 2021. This is a 40% larger response than received from 2020 visitors. The larger response is not surprising given the 2021 gradual recovery from the COVID-19 pandemic that negatively impacted 2020 travel.

One component of this research was a cross-tabulation of two sub-groups of visitors from the survey response; this subset captures day-trip travelers and those who rented private homes (short-term renters) during their visits. Survey and project methodology, broader regional traveler data and marketing/return on investment (ROI) analysis for the full visitor group are included in a separate report. Analysis of the sub-groups of day visitors and short-term renters follows here.

DAY TRIP VISITORS

Day trip visitors are those who responded in the survey that they traveled to the area for one day only, with zero overnights. A total of 1,611 of such responses from 2021 trips were received out of 6,161 total responses. This is 26% of respondents, far lower than the 34% of respondents from 2020 who reported day visits only. Travel recovery following extreme precautions due to COVID-19 in 2020 likely accounted for this drop in reported day travel to more recent proportions.

The following summarizes variations of 2021 day trip visitors from the overall regional visitor population:

- Average day trip visitor party size is 2.8 persons, including 2.3 adults and 0.5 child. This represents a drop in party size from the extreme high of 4 adults and 1 child from 2020, presumably from pandemic disruption. It is lower than the party size average of all regional visitors reported at 3.3.
- Overall visit expenditures continue to be much lower among day trip visitors. The total average reported party expenditure for day travel is \$255 compared to \$421 daily expenditures by all visitors. This daily spending figure of day trip visitors also declined from a high of \$372 reported in 2020.
- Shopping comprises the largest portion of this reported spending at \$98. Meals are the next largest category of expenditures at \$66, followed by transportation (\$34) and attractions or events (\$24).
- Nearly one-third of day visits (31%) are reported during peak fall foliage season (September/October) with other visitation levels spread out fairly evenly through rest of year. This is consistent with the full group of regional visitors.
- Relaxing, shopping and dining is the strongest draw reported by 2021 visitors with 82% reporting this attraction to visit. Sightseeing follows this level of interest closely by 77% of 2021 respondents.
- Interest in outdoor activities reported by day visitors remained strong, with nearly 3 out of 4 (74%) 2021 respondents reporting this as a draw. The next

most common draw reported was to visit family or friends (29%). Level of expressed interest in outdoor activities is lower among day visitors.

- Among day visitors who responded that they were interested in outdoor activities, interest in hiking was by far the most popular interest, selected by 76% of respondents. Expressed interest in canoeing/kayaking was 14%, fishing 10% and cross-country skiing/boarding at 9%.
- At 59 years, the mean age of daytrip visitors is very slightly older than all visitors age (58).

SHORT-TERM RENTALS

The visitor survey asked respondents who traveled to the region for overnight stays in 2021 about their primary lodging choice. This section is devoted to the results of those visitors who indicated that they stayed in a private home rental (through Airbnb, AdkByOwner, etc.), referred to here as a "short-term rental".

Nine hundred forty-five (945) respondents in the region indicated that they stayed in a short-term rental. This 15% of respondents is slightly below the approximately 1,100 respondents who indicated this type of accommodations for visits from 2020. The following is a summary of visitors who stayed in short-term rentals in comparison to overall regional visitor respondents.

- Average short-term renter traveler party size is larger with 5 persons (3.7 adults and 1.3 children) versus 3.7 for all visitors to the region.
- Total expenditures reported among short-term renters were an average of \$2,693. This is nearly double the average regional visitor reported expenditures of \$1,390 per trip.
- Lodging costs accounted for more than half of this reported expenditure (\$1,527). Meals (\$422) and shopping (\$296) expenditures also increased, while the other areas showed spending decreases. All expenditures reported by short-term renters are substantially higher than all regional visitor averages.
- The reported average length of stay for short term renters fell substantially from reported levels from 2020 (to 4.8 nights from 10 nights), however this

remains well above all regional visitor average stays of 3.3 nights.

- Peak summer visits remained the most common time for reported visitation (July/August) at 35% of visits, followed by September/October with 29%.
- Outdoor activities (77%), relaxing/dining (60%) and sightseeing (46%) were the highest levels of reported interest to visit the area among short-term renters.
- The mean age of short-term renters is slightly younger than the full regional group at 55 years (versus 58).

CONCLUSION

The survey data was cross tabulated for the purposes of analyzing two sub-groups of visitor data. Both groups have yielded sufficient sample sizes (1,611 and 945) to provide good indications from which to draw conclusions. Many of the differences among these sub-groups from the full regional sample are consistent across the 3 (excluding the anomaly year of 2020 due to peak COVID-19 impacts) years that this data has been analyzed.

Day trip visitors are a large piece of the visiting fabric of the region and provide substantial economic impact, particularly with assumed proximities to visit and ability to return more frequently. Day trip visitor presence continued strong growth during 2021, although not surprisingly, dropped in proportion from 2020 reported visits while pandemic precautions were at a peak.

Day trip visitors, on average, are smaller groups and spend less in all expenditure categories, even daily, than all visitors aggregated. Day trip visitor impacts are constrained by the brief time spent in the area and spending patterns which are substantiated by this research. Shopping expenditures account for nearly half of total spending by day visitors.

Short-term renters represent a sizable and continually growing market within the region and nationwide. National data confirms that short-term rentals rebounded faster than hotels¹ during 2020 and 2021. Nationwide, length of stays increased by approximately 60% at short-term rentals in 2021, but early research from full year 2021 shows a decline in length of stays.

While average visitor party size among short term renters declined substantially from that seen in 2020, the reported party size remains much higher than overall visitors. The larger “COVID-pod” type travel which inflated average visitor party size in 2020 appears to have subsided, although group sizes of short-term rentals continue to be substantially larger than in other accommodation types.

The data gathered from this survey shows continued highly positive indications from the short-term renter group- including longer visits, larger traveler parties and high expenditure levels across all categories. It is important to the region that private home rentals average higher expenditure levels that expand well beyond lodging costs into all other expenditure categories, such as shopping, meals, entertainment, attraction, and events.

Availability of short-term rentals is growing across the region, especially in more remote locations. Their location and presence provide both opportunities with expanding visitor markets and economic impact, and strains to community infrastructure. ROOST was a regional leader in instituting occupancy tax collection for these properties’ years ago. The agency and its partners will continue to use collected data to work to improve solutions to the challenges and opportunities that short-term rentals create.

Sources

1. USA Today: "Why are Vacation Rentals more Popular than Hotels during COVID?". [Airbnb, Vrbo more popular than hotels during COVID-19 pandemic \(usatoday.com\)](https://www.usatoday.com/story/travel/hotels/2020/08/26/airbnb-vrbo-more-popular-than-hotels-during-covid-19-pandemic/5311170002/). August 26, 2020.
2. Air DNA: [2022 U.S. Short-Term Rental Outlook Report | AirDNA Forecast](https://www.airdna.co/blog/2022-u-s-short-term-rental-outlook-report-airdna-forecast) December 15, 2021.