

# TRAVEL STUDY

## 2021 TRAVELER PROFILE

### *Hamilton County, New York*

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*Regional Office of Sustainable Tourism (ROOST)*



*photo credit: ROOST*

**PlaceMaking**  
**Growing North Country Communities and Economies**

April 2022

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## **EXECUTIVE SUMMARY**

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### **Introduction**

The Regional Office of Sustainable Tourism (ROOST) commissioned, for the sixth year, this study to measure traveler information and key marketing program statistics for Hamilton County, New York. ROOST is responsible for marketing Hamilton County's tourism assets. The research was targeted for the leisure travel market and excludes the group and business market segments.

As with data collection for the 2020 year, 2021 continued unprecedented disruption resulting from 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 leisure travelers to 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 Hamilton County.

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 25,000 traceable leads who were interested in visiting Hamilton County in 2021. PlaceMaking also conducted similar research for neighboring Essex County and for the cumulative two-county region. A regional summary and ROI analysis is provided under separate cover.

### **Survey Respondent Data Summary**

Highlights of 2021 visitation to the region from among all survey respondents included:

#### Demographics and Visit Information

- Average traveler party age of respondents was 59 years old, slightly higher than the five-year average of 57 years.
- Respondents included 61% female and 39% males.
- Ninety-six percent (96%) of visitor respondents were of white ethnicity; with 1% Asian and less than 1% each Hispanic and African American. Two percent of visitors reported mixed race.
- The average reported total traveler party size dropped among reported 2021 visitors, to 3 adults and 0.8 child, a return closer to average sizes reported pre-pandemic.
- Visitation by respondents from within New York State declined to 81% of respondents (from 89% in 2020).
- Of New York State visitors, a majority of respondents (53%) reported coming from central or western NY State. Just less than one-quarter (23%) reported coming from the Capital District or North Country.
- Northeastern state visitors outside of NYS climbed somewhat from prior year to 12% respondents. Reported visitation from other U.S. regions than the Northeast was 3%.
- Not surprisingly due to the continued border travel restrictions, reported visitation from Canadian visitors was less than 1%.
- Stay length reported by 2021 travelers dropped from the anomalous 2020 year- from 7 nights to 3.7 nights.
- Fall season visitation (September/October) jumped to 31% of all 2021 reported visits, just slightly higher than peak summer (July/August) visitation at 30%. Reported visitation in early summer (May/June) dropped to 18% and reported early winter visitation (November/December) rose to 5%. January/February visitation stayed consistent from year prior at 9%.
- Camping/RV grew to the most reported lodging choice among 2021 traveler respondents at 26%, followed closely by hotels/motels at 23%. Second home use was the third most common selection at 18% followed closely by private home rentals (16%) and staying with family/friends (15%).

## Interests

- The most popular reported attraction to visit the region continued to be outdoor activities, with 65% of respondents selecting this draw to visit.
- “Relaxing, dining and shopping” remained the second most common expressed reason to visit the area by 56% of respondents. Sightseeing (44%) and visiting friends (26%) rounded out the top four areas of interest. Nine percent (9%) reported interest in heritage sites.
- Seventy-seven percent (77%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was a primary activity of interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (45%), followed by boating (22%).
- Fishing was expressed as an outdoor activity of interest in 12% of respondents and 8% reported interest in cycling.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 72% of respondents indicating interest in day hikes , 36% in leisure and hard surface hiking and 33% in family hikes.

## Traveler Spending and Conversion

- The average daily traveler party spending in 2021 increased to \$314 daily from \$184 in 2020. The total estimated average trip expenditure for 2021 visitors is \$1,161, just lower than reported in 2020. This is a remarkable growth for daily expenditures, however.
- Reported spending on lodging accounted for much of this daily expenditure growth at a near high of \$526 per stay. It will be notable to see if the rates remain this high in future years’ data.

- Average meals (\$221) and shopping (\$174) also showed growth from 5-year daily spending trend. The stronger than 5-year average expenditures suggest a positive trend which will be notable to examine in future years.
- 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 80%. This shows a trend of steady increases in this measurement of effectiveness in marketing to the region.

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## **METHODOLOGY**

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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. PlaceMaking and ROOST jointly designed the survey instrument to gather information from its leisure travelers, and to measure regionally the return on investment of marketing expenditures. As ROOST represents the tourism marketing interest for numerous Adirondack communities, the survey of 2021 travelers also included adjacent Essex County. Traveler studies for the two-county region and for Essex County individually are provided under separate cover.

The research team parsed data by where the traveler indicated spending the most time to achieve individual county level results. While this is not an exact measure, the researchers believe that this provides reasonable results as the methodology is consistent per county and has shown reliability across multiple applications.

ROOST distributed the survey electronically to a sampling of its electronic database of visitors inquiring about visitation to Hamilton 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 allows surveys to be modified very slightly by seasonal activities and particularly to improve trip data recollection nearest to actual date of travel.

The visitors 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,

Instagram and YouTube), 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 is 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 higher survey return rate without skewing data.

ROOST sent a total of 8,000 invitations successfully through electronic mail to Hamilton County visitors. Of this group, 1,859 responses were received for an approximately 20% response rate. Of this, 135 responses were received by an additional Facebook post which would render this response rate slightly lower. Survey responses for the county were at a record high which contributes to strong data pooling and better reliability of findings.

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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## **CONCLUSION**

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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 modified 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 extremely popular. Hamilton County 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. 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 returned 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 continue 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. It is particularly notable that within Hamilton County, total lodging remained at same total spending levels although visits were shorter than in 2020. This is a strong point for potential continued regional economic impact.

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). Business and international travel still report far below these domestic leisure travel rates.

The research team continues to assess how best to collect data from visitors to analyze aggregate impacts and implications on county tourism assets. Considering the global pandemic recovery, these data show a bright spot for some economic recovery in the tourism industry in Hamilton County in 2022 and beyond. The higher levels of daily spending are a strong point to continue to grow the regional economy.

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.

Table 1 below summarizes key Hamilton County traveler data ascertained by this survey during the last five years of data collection.



**TABLE 1. KEY FACTS DERIVED FROM SURVEY DATA-  
5-YEAR COMPARISON**

	<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	1,303	1,859	915	942	1,333	1,466
Average Income of Respondents	\$90,000	\$100,000	\$90,000	\$90,000	\$80,000	\$90,000
Mean Age of Respondents	57	59	55	57	58	56
Respondent Gender	57% Female 43% Male	61% Female 39% Male	59% Female 40% Male	54% Female 46% Male	59% Female 41% Male	54% Female 46% Male
Average Night Stays/ Party	4 Nights	3.7 Nights	7 Nights	3.2 Nights	3 Nights	3 Nights
Average Party Size	4 Persons	3.8 Persons	5.2 Persons	3.4 Persons	3.9 Persons	3.9 Persons
Conversion Factor Rate	78%	80%	81%	77%	76%	78%
Average Daily Expenditure per Party	\$278	\$314	\$167	\$306	\$312	\$289
Average Total Expenditure per Party per Trip	\$1,016	\$1,162	\$1,167	\$963	\$934	\$855

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## **SOURCES CITED**

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1. Smith Travel Research, Inc. (property of Lake Placid CVB)- Trend Report, 2022.
2. Statista.com. "Domestic Travel Spending". 2022
3. U.S. Travel Association. "Travel- Forecasts" [ustravel.org](http://ustravel.org) 3/30/22