

# Leisure Travel Study

Lake Placid, Essex and Hamilton Counties, Saranac  
Lake, and Tupper Lake

2021 Hamilton County Visitor Focus

July 2022

ROOST

# Project Background & Methodology

- ROOST commissioned a study by PlaceMaking, a regional community and economic development research firm, to determine non-business traveler information at the county levels and to gauge key regional marketing program statistics for 2021 non-business visitors.
- As 2021 continued unprecedented disruptions as a result of the COVID-19 pandemic, researchers and ROOST recognize the unusual time of visitation and social trends during 2020 and caution against direct comparison to other years of research.
- 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.

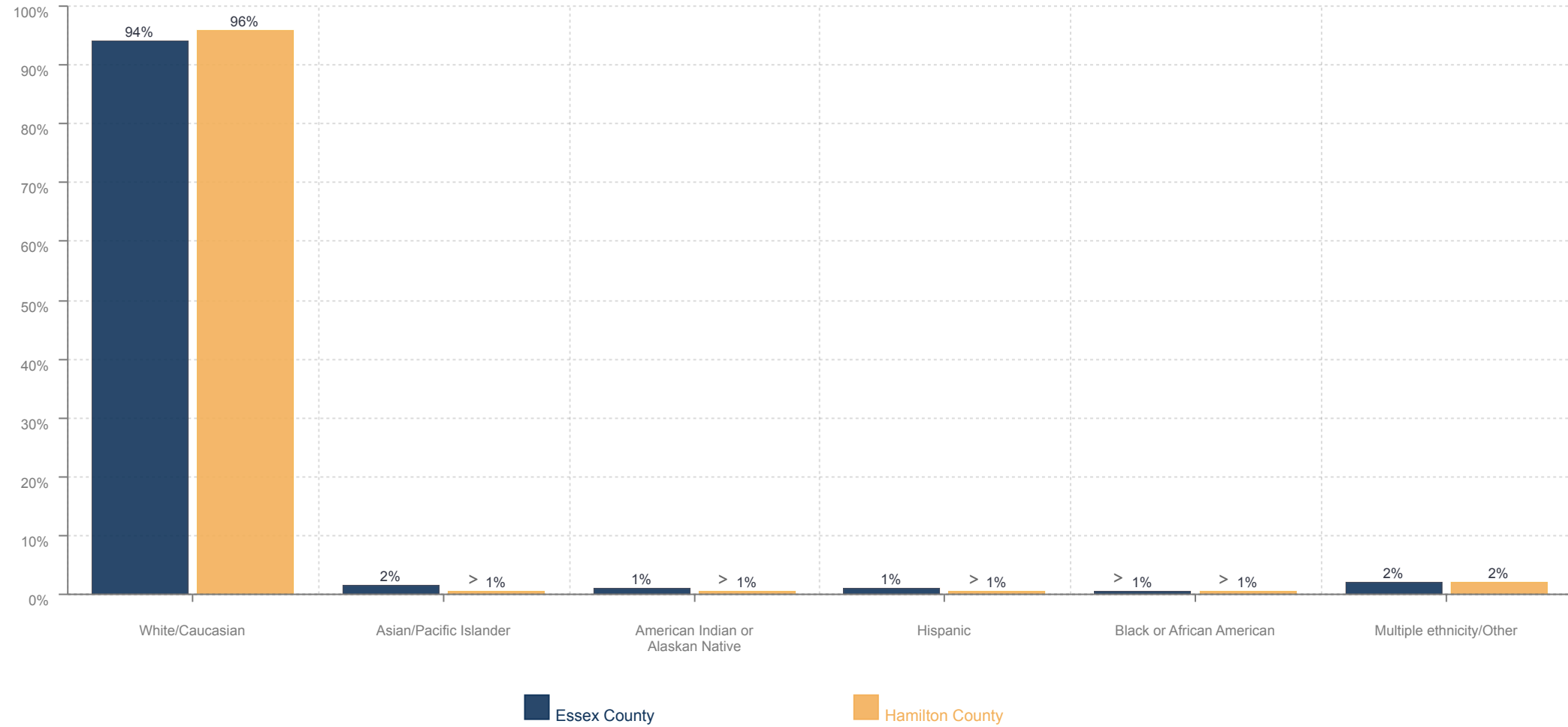


# Project Background & Methodology

- 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 211,930 traceable leads who were interested in visiting the region in 2021. Research was analyzed for each county as well.

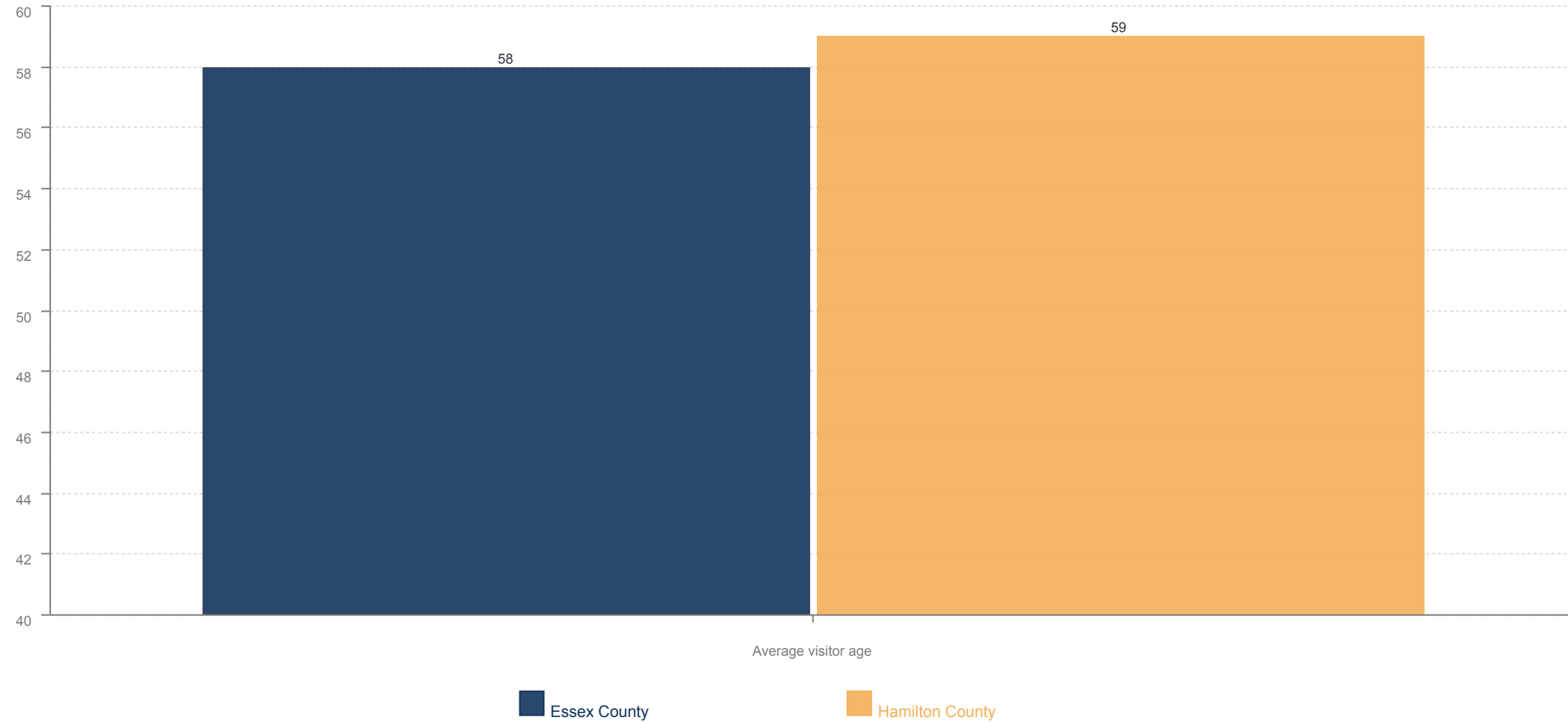
# Ethnicity

## All travelers



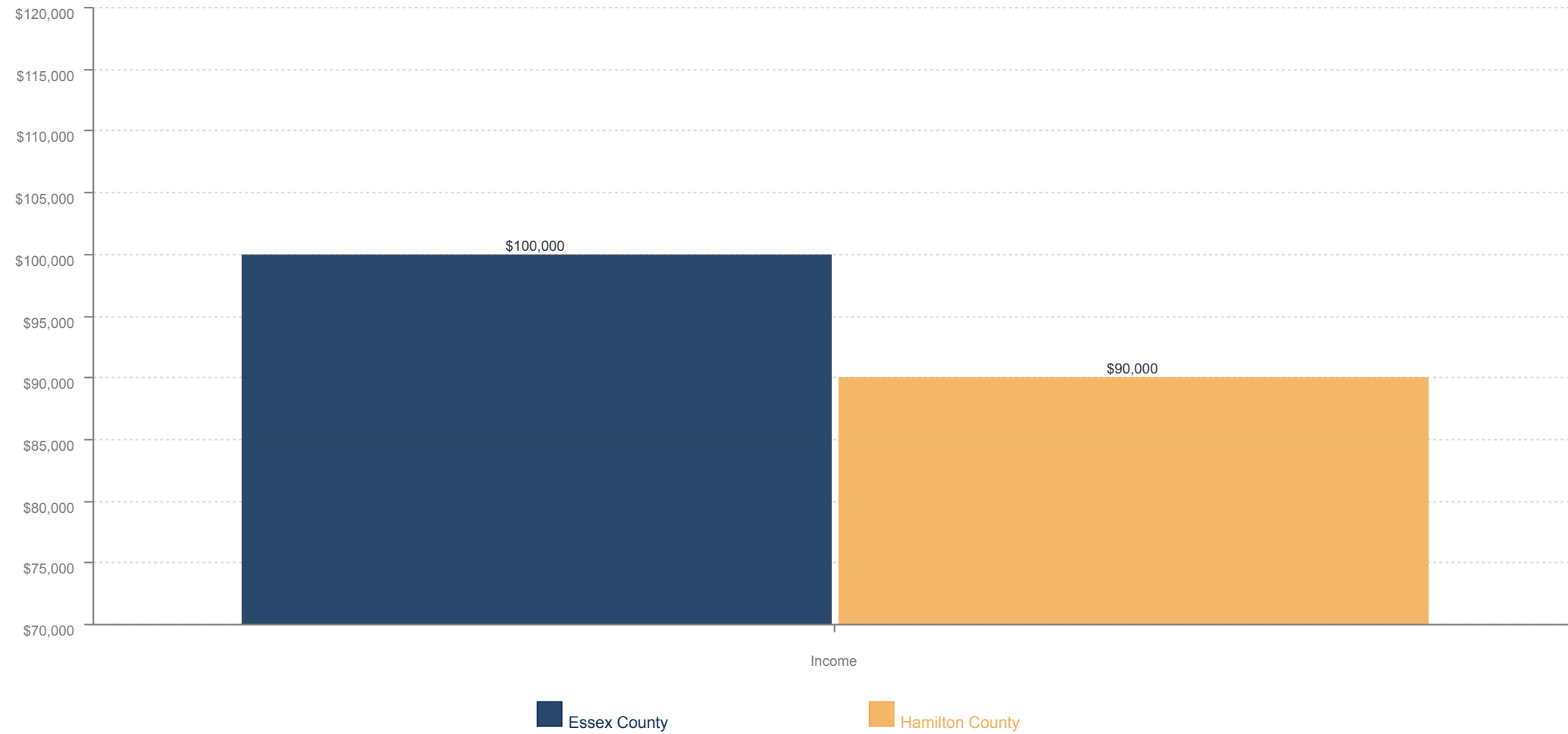
# Average Age

## All travelers



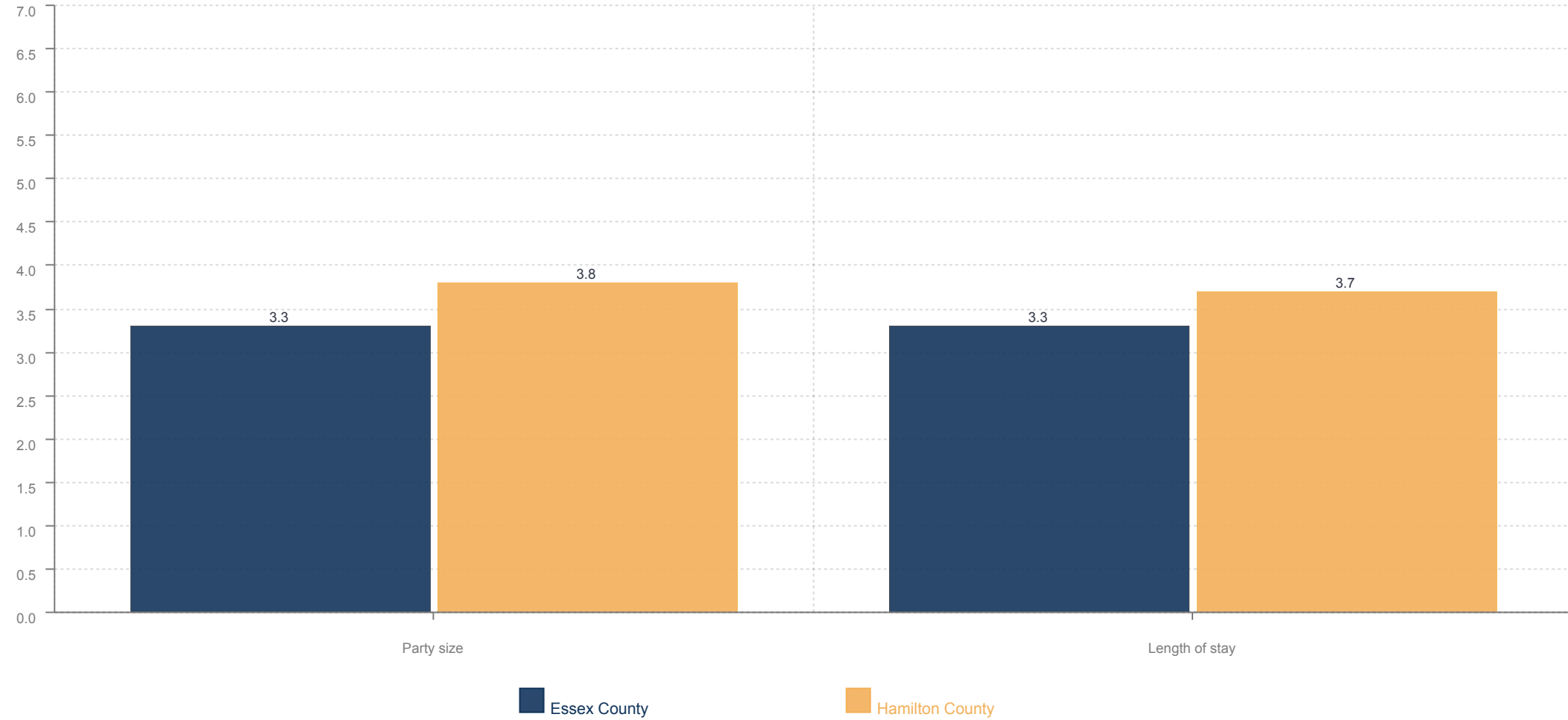
# Average Income

All travelers



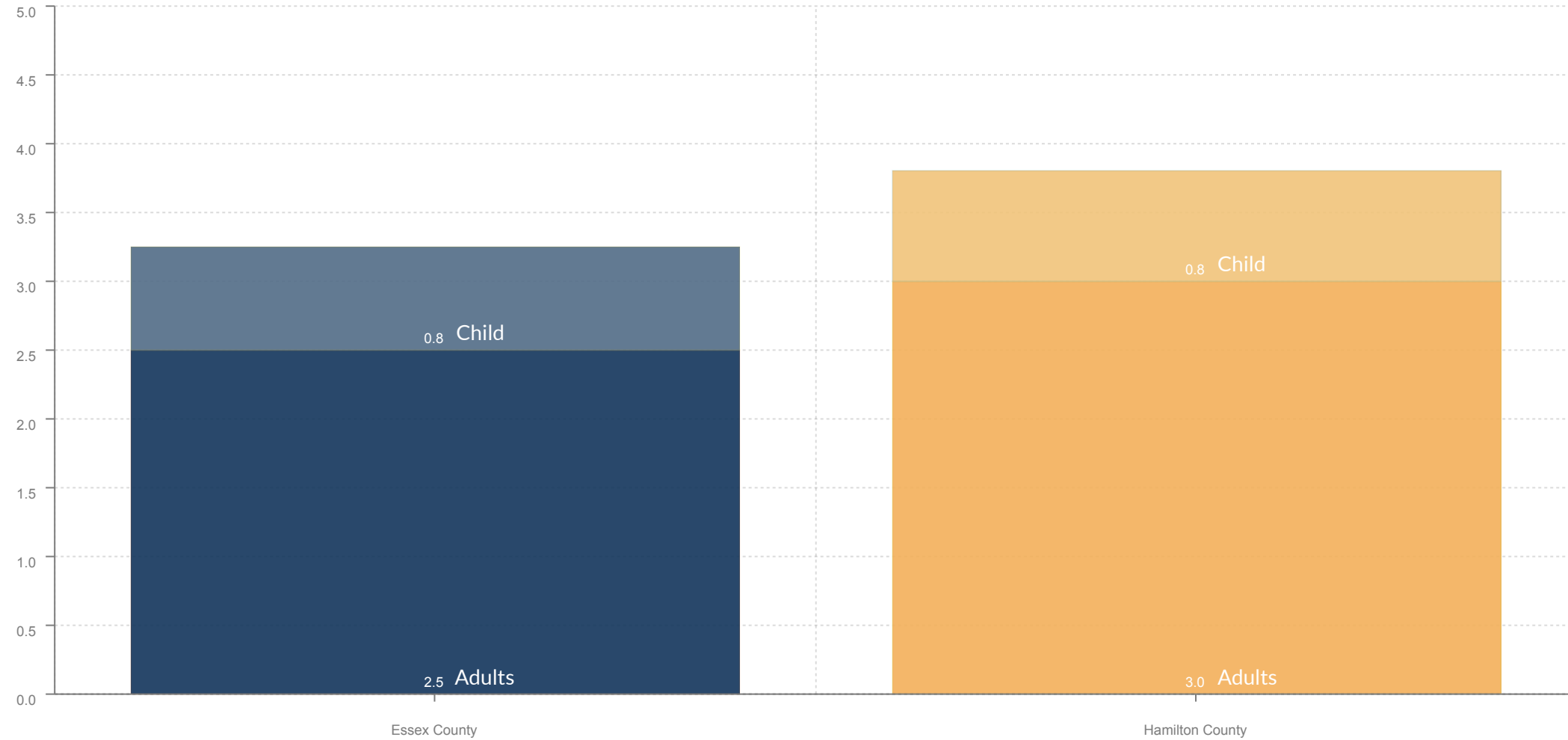
# Party Size / Length of Stay

All travelers



# Party Composition

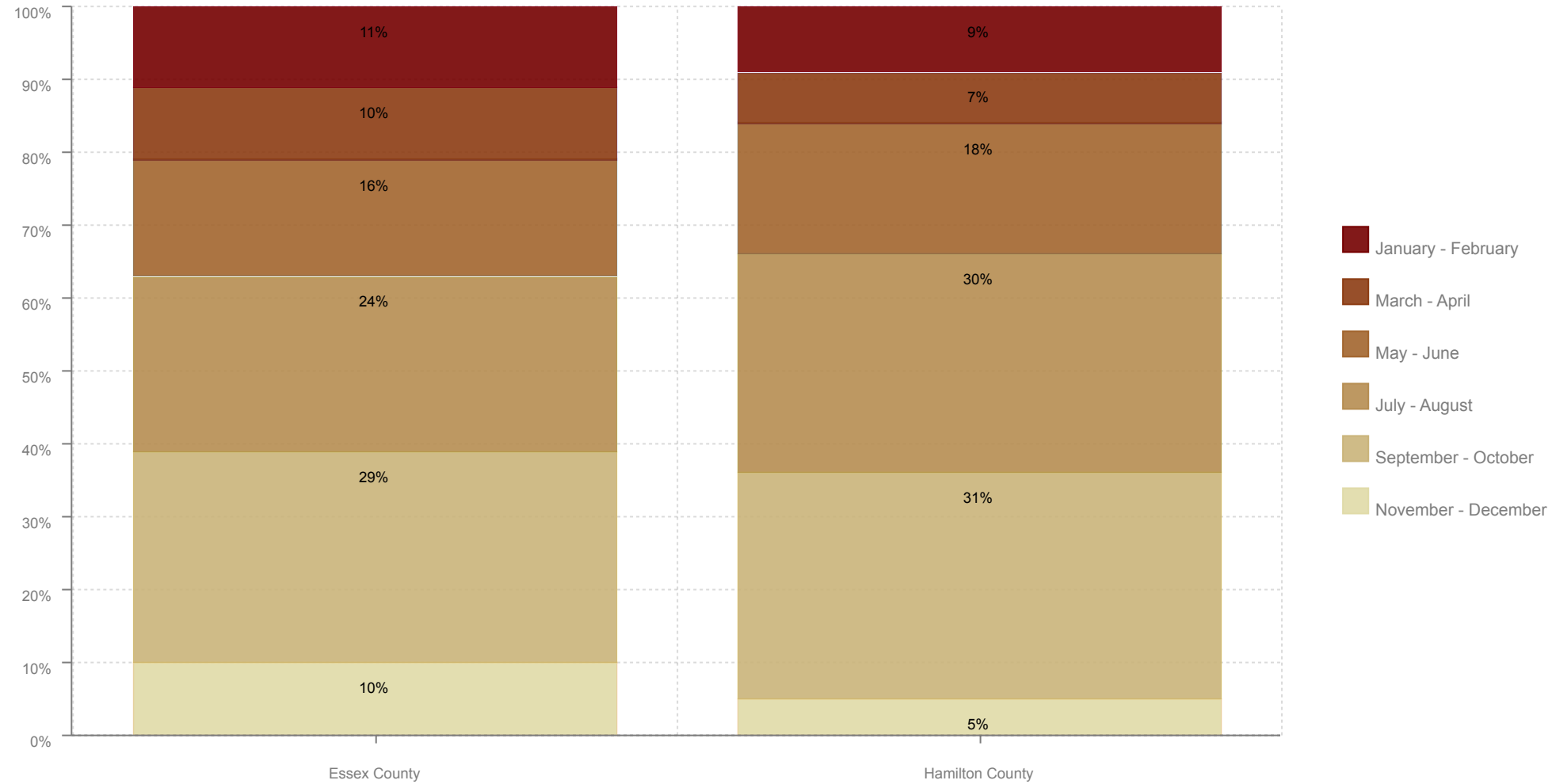
All travelers





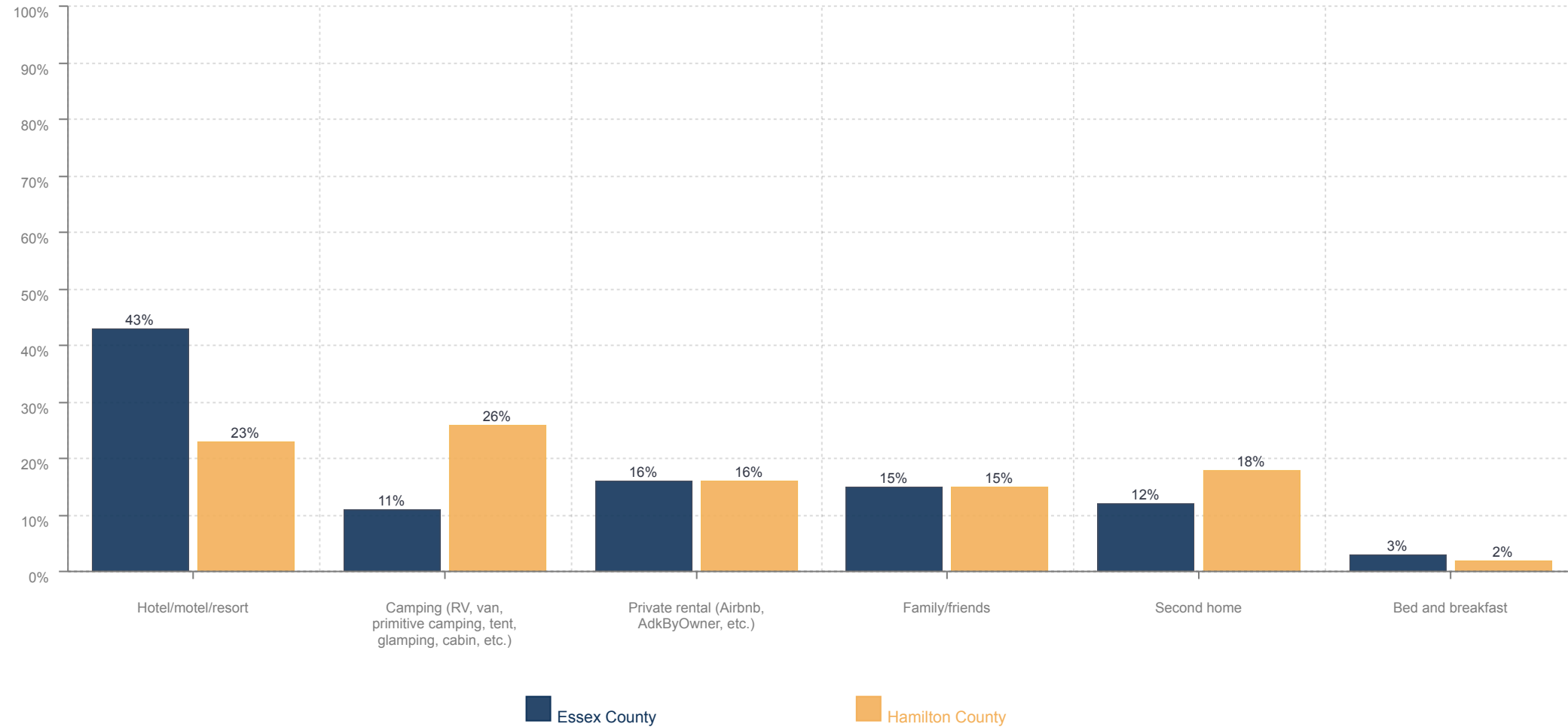
# Time of Year Visited

All travelers



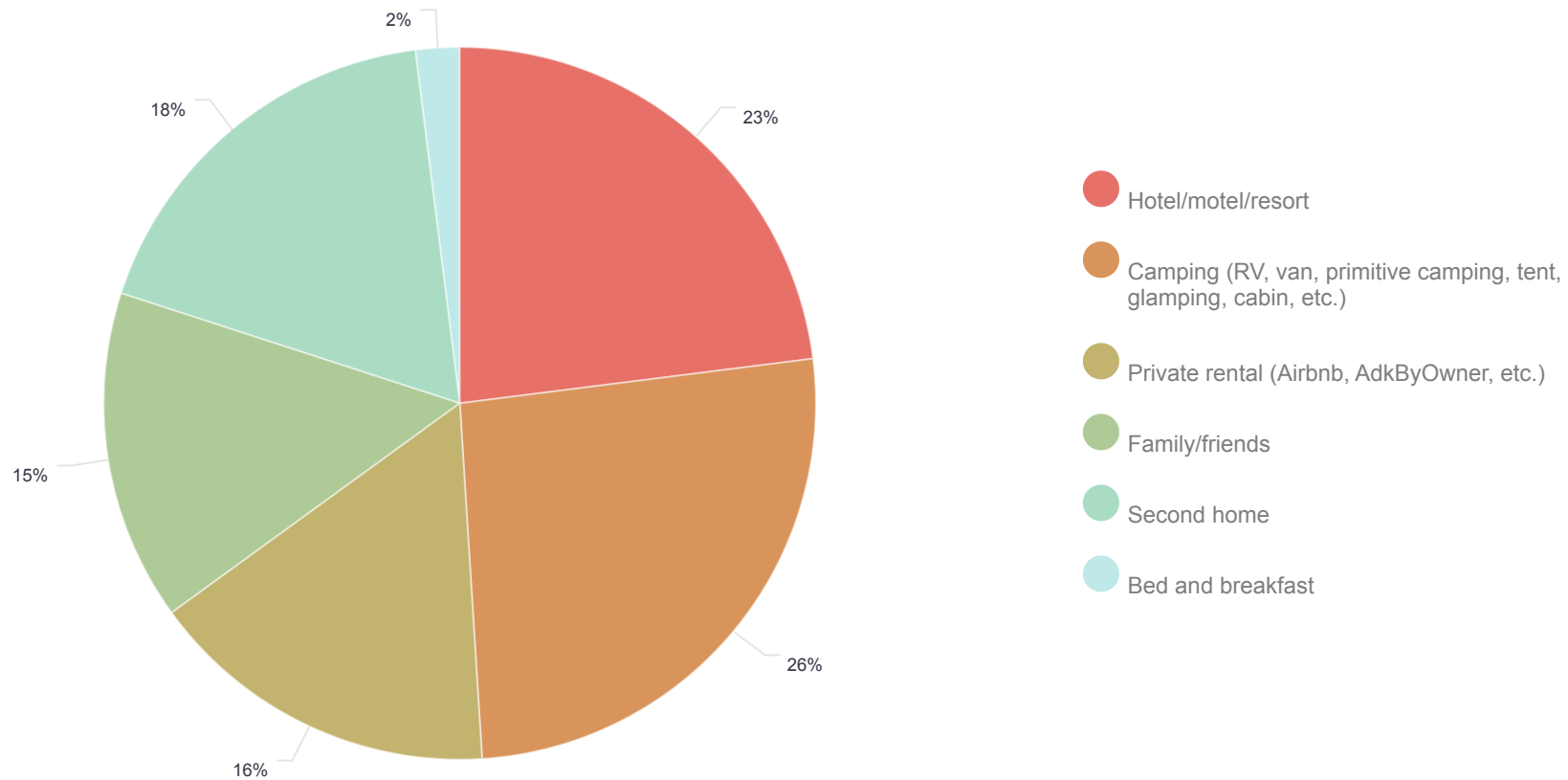
# Lodging Accommodations

All travelers



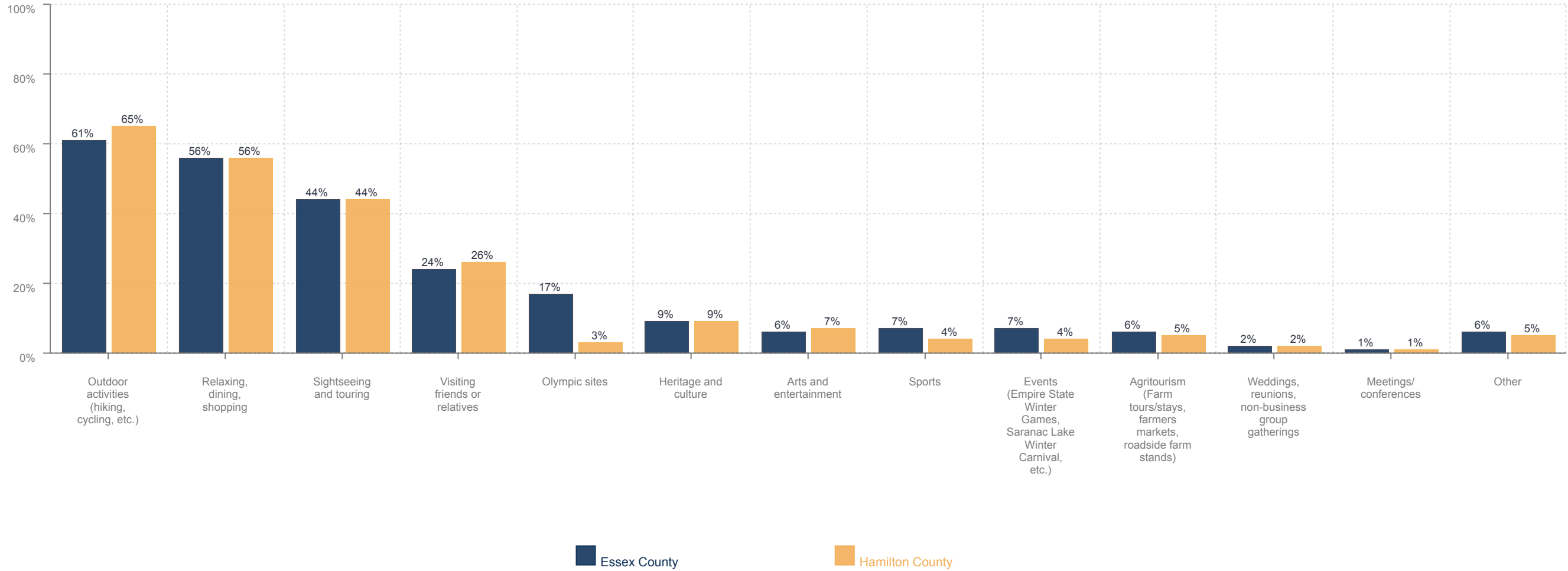
# Lodging Accommodations

Hamilton County travelers



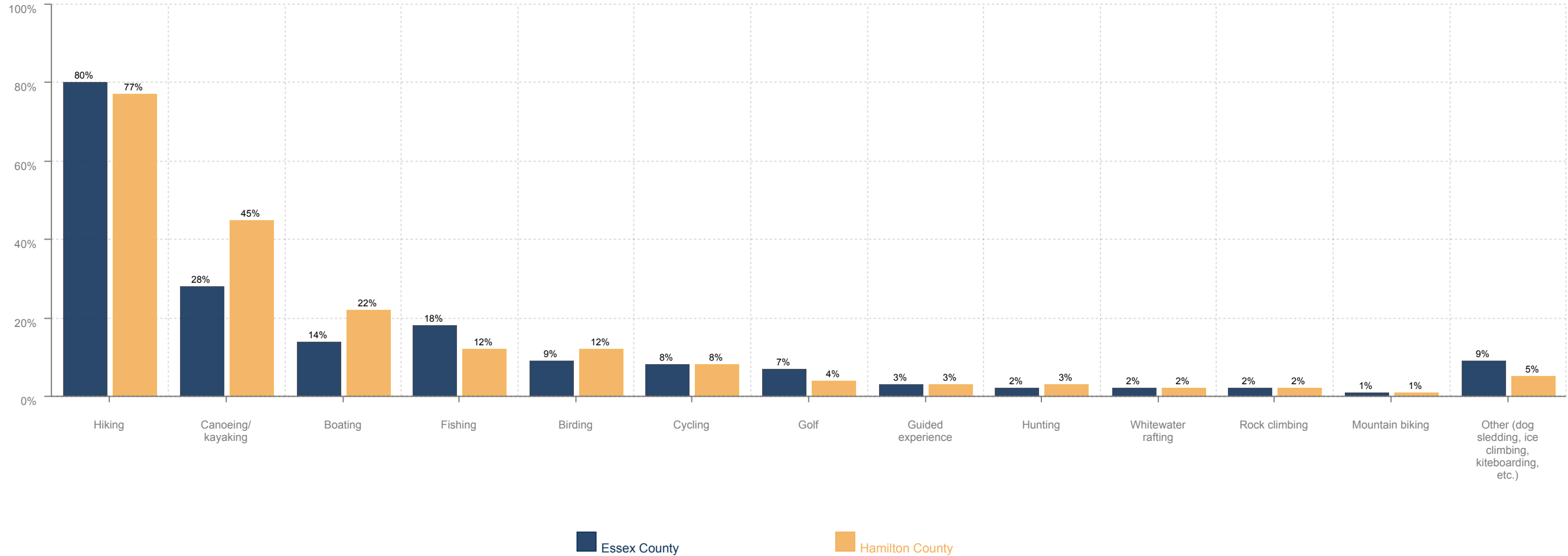
# Key Attractions

All travelers



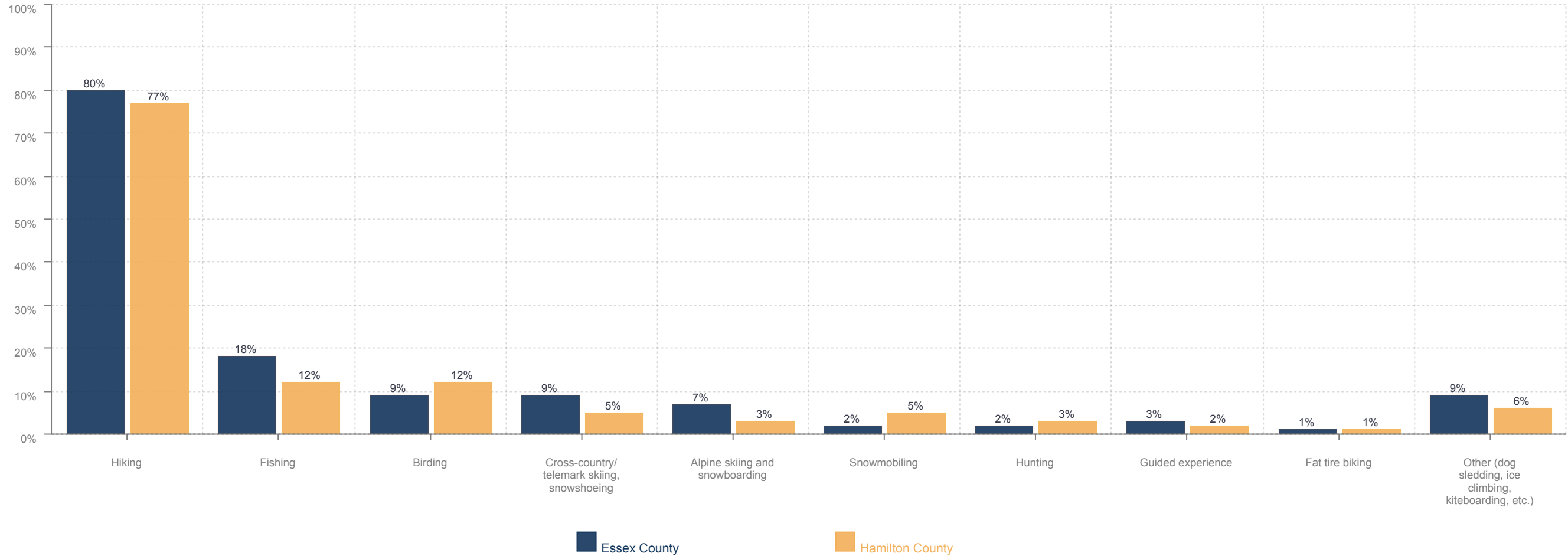
# Outdoor Spring / Summer Activities

All travelers



# Outdoor Fall / Winter Activities

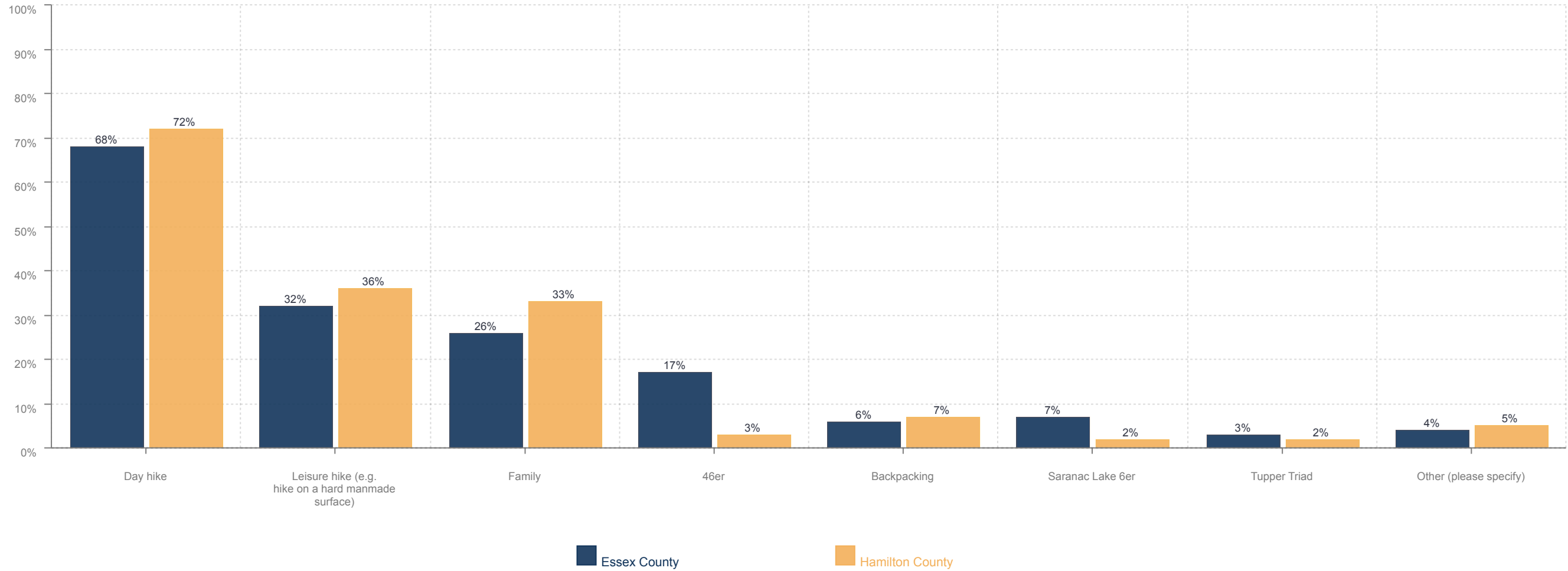
All travelers





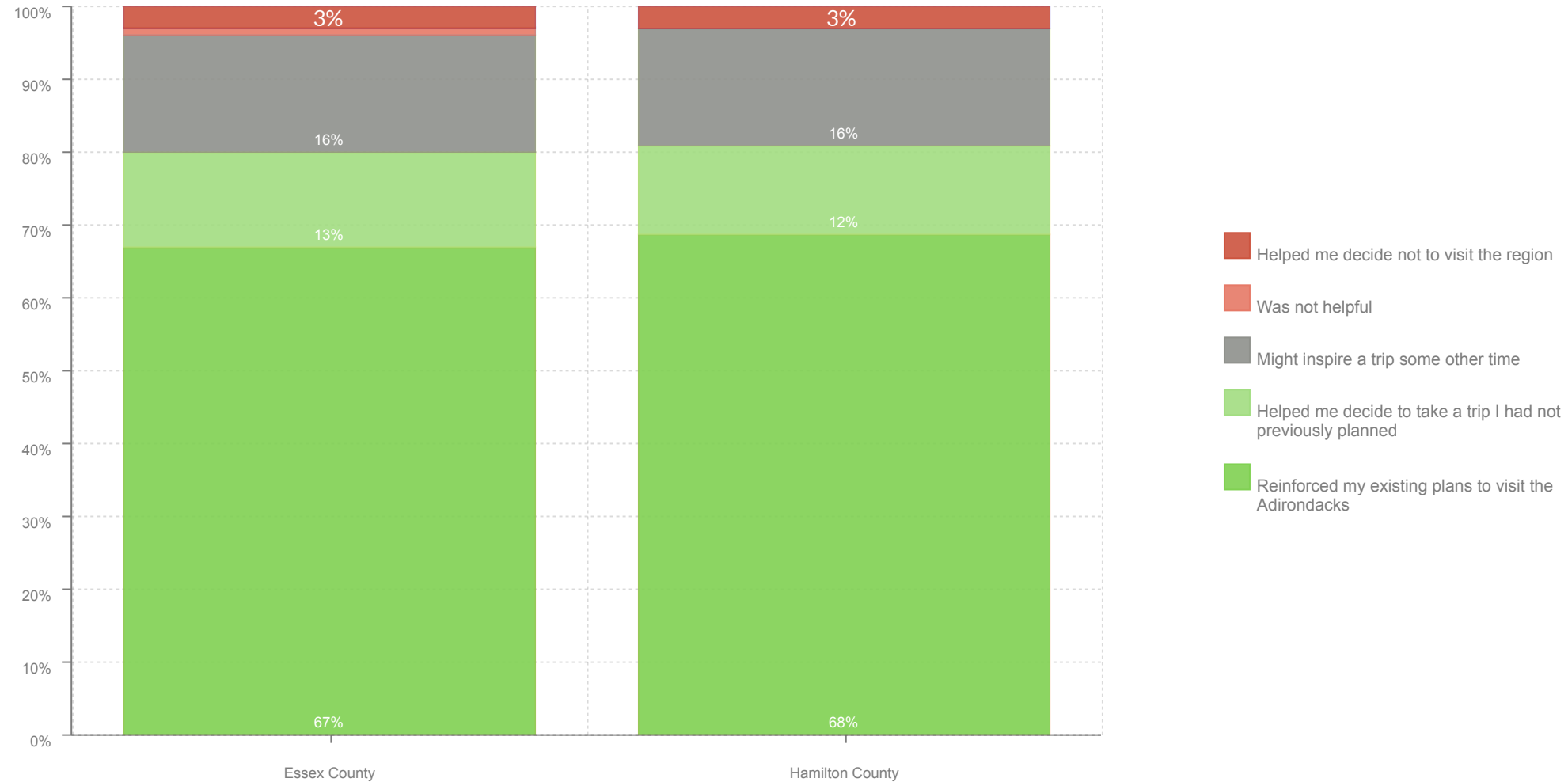
# Hiking Breakdown

All travelers



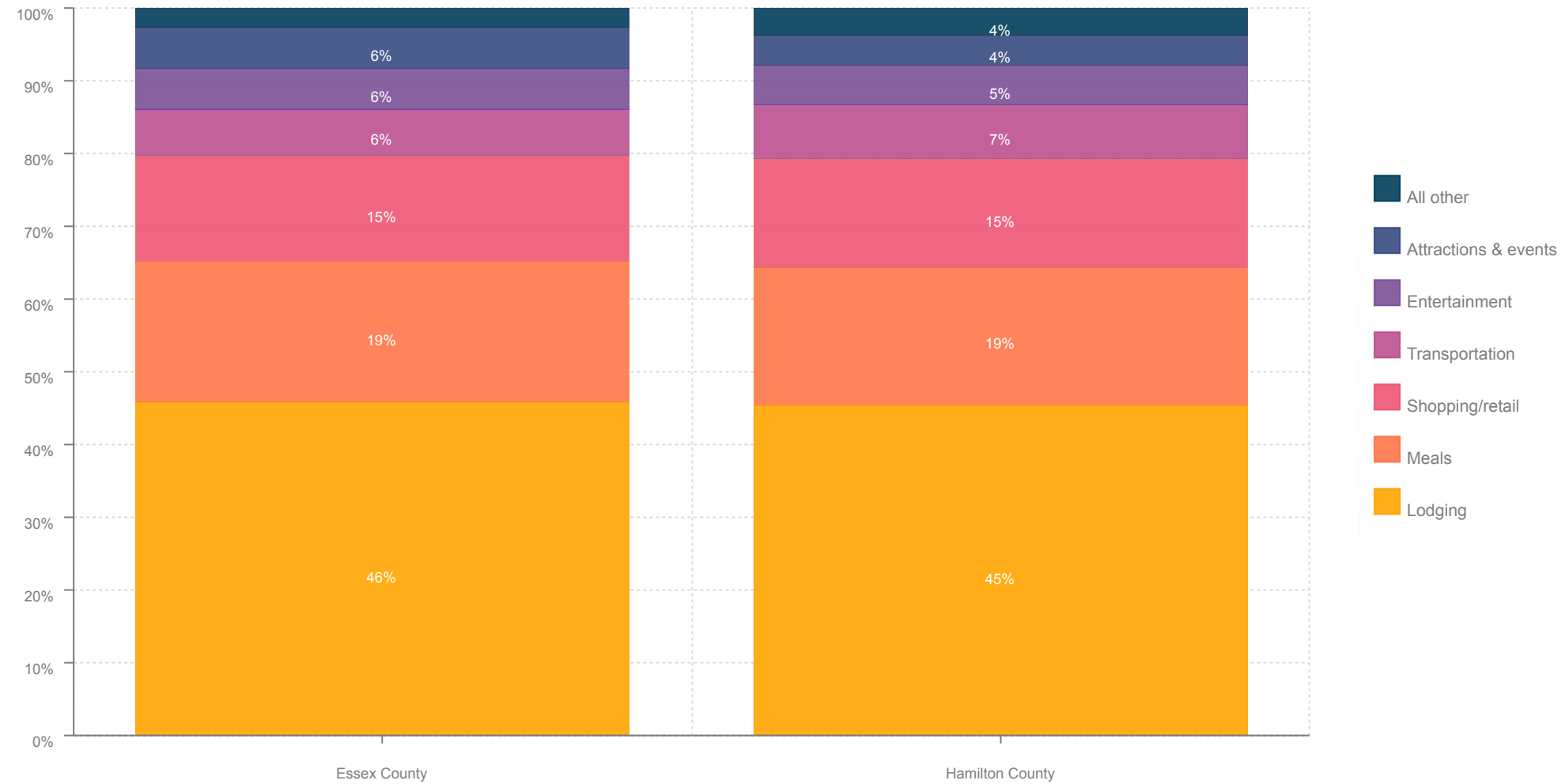
# Conversion Rate from Viewing ROOST Marketing Materials

All travelers



# Total Expenditure Allocation by Category

All travelers



# Mean Party Expenditures

All travelers

	Essex County	Hamilton County
Lodging	\$213	\$142
Meals	\$89	\$60
Shopping/retail	\$67	\$47
Transportation	\$30	\$24
Entertainment	\$26	\$17
Attractions & events	\$26	\$13
All other	\$13	\$11
Average daily expenditure	\$464	\$314
Average total expenditure	\$1,484	\$1,162





# Hamilton County Visitor Profile

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# Visitor Profile

All Hamilton County travelers

- Average traveler party age of respondents was 55 years old, very slightly lower than the five-year average of 56 years.
- 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.
- 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).



# Visitor Profile

All Hamilton County travelers

- 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%.
- 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 at 7%.

# Visitor Profile

All Hamilton County travelers

- 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%).
- 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 (24%) rounded out the top four areas of interest. Nine percent (9%) reported interest in heritage sites.

# Visitor Profile

All Hamilton County travelers

- 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.
- 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 a 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.



# Regional Visitor Impacts



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# Regional Visitor Impacts

All travelers

- Average traveler party age of respondents was 59 years old, slightly older than the five-year average and in prior year findings.
- 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.
- 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.



# Regional Visitor Impacts

All travelers

- Northeastern state visitors outside of NYS rose slightly to 18% of respondents and visitors reporting from states outside the northeast rose slightly to 7%.
- 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 5 nights in 2020). This is much closer to the 5-year average length reported stay.
- Peak fall visitation (30%) climbed to exceed summer visitation (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.



# Regional Visitor Impacts

All travelers

- 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.
- The most reported attraction to visit the region continued to be outdoor activities by 62% of respondents.
- “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.

# Regional Visitor Impacts

All travelers

- 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%).
- 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.
- 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.

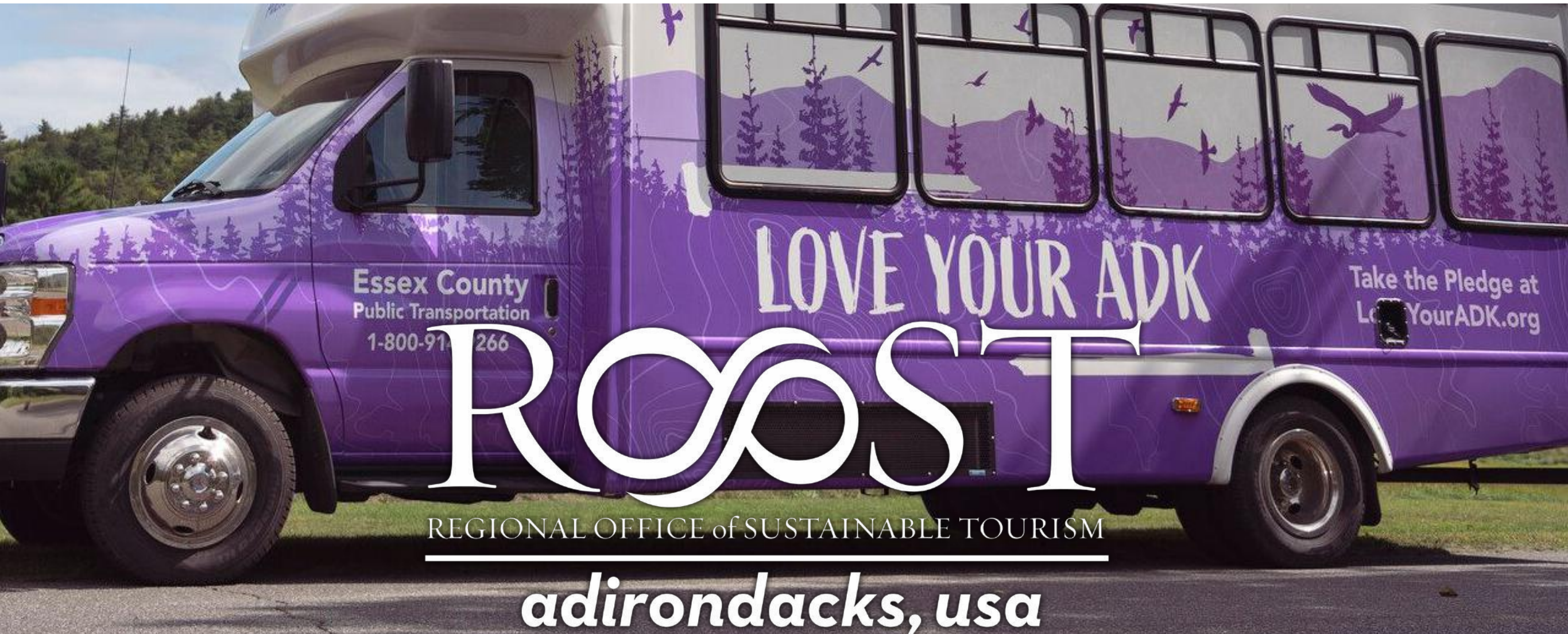
# Regional Visitor Impacts

All travelers

- 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.
- 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 from years of this study.



# Regional ROI Study



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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:

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

- Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2021 is **\$242,685,282.**



# 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:

$$\begin{array}{rcl} \$242,685,282 & \text{(total estimated traveler revenue)} & \\ \div & \$3,232,178 & \text{(total ROOST marketing expenditures)} \end{array}$$

- This produces a conservatively-estimated ROI of **75:1** in leisure traveler-related revenue for every marketing dollar expended