

Leisure Travel Study

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

2021 County Visitor Profiles and Regional
Return on Marketing Investment Analysis

July 2022

ROOST

Project Background & Methodology

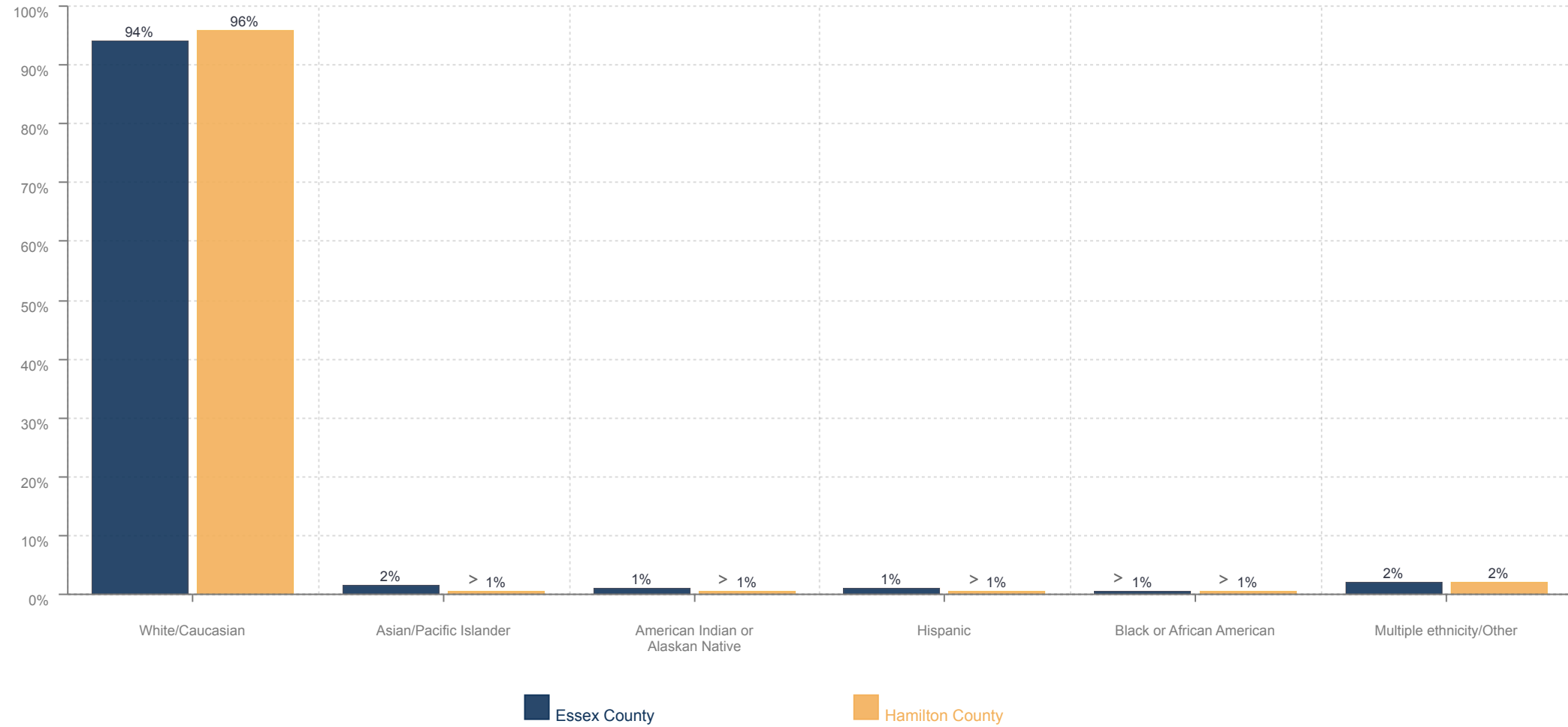
- ROOST commissioned a study by PlaceMaking, a regional community and economic development research firm, to determine non-business traveler information at the county levels and to gauge key regional marketing program statistics for 2021 non-business visitors.
- As 2021 continued unprecedented disruptions 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.

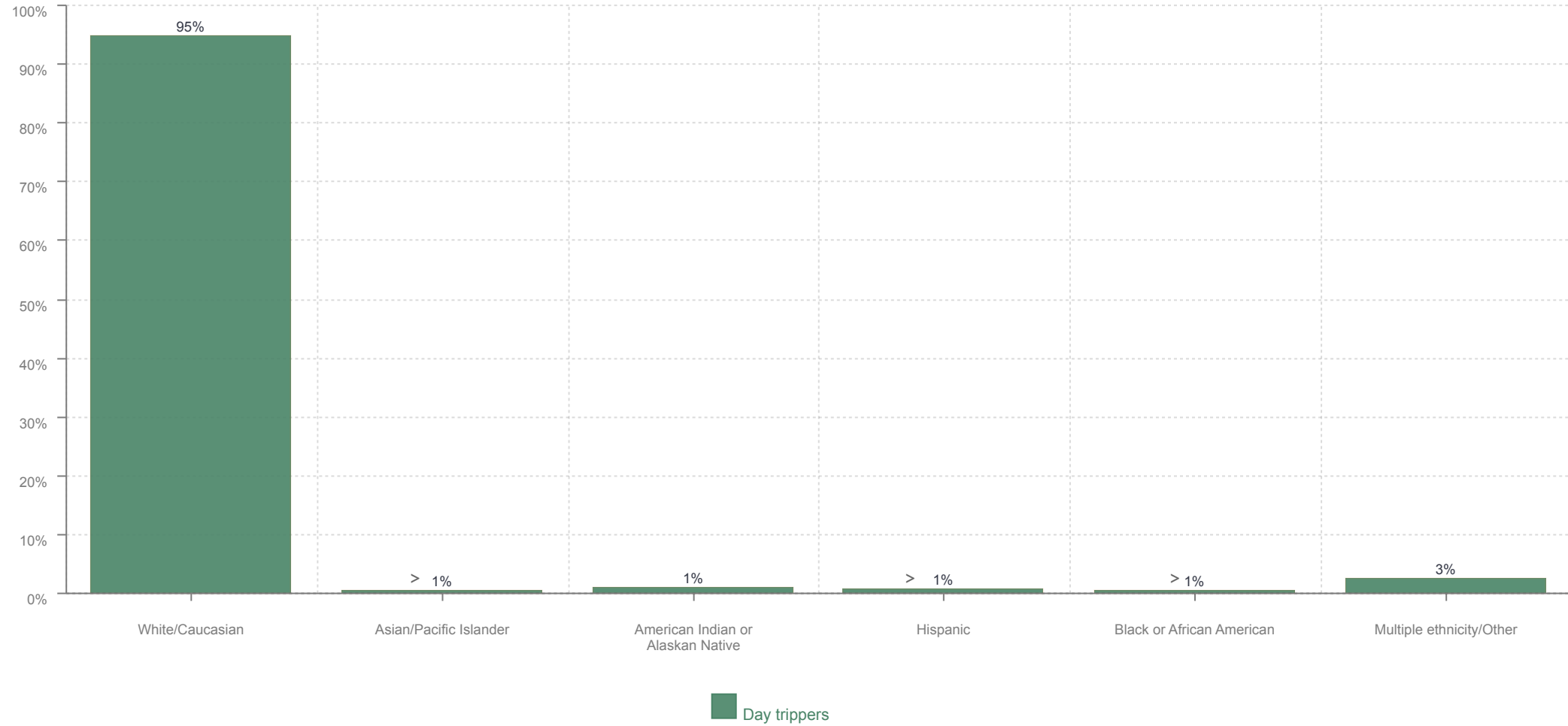
Ethnicity

All travelers



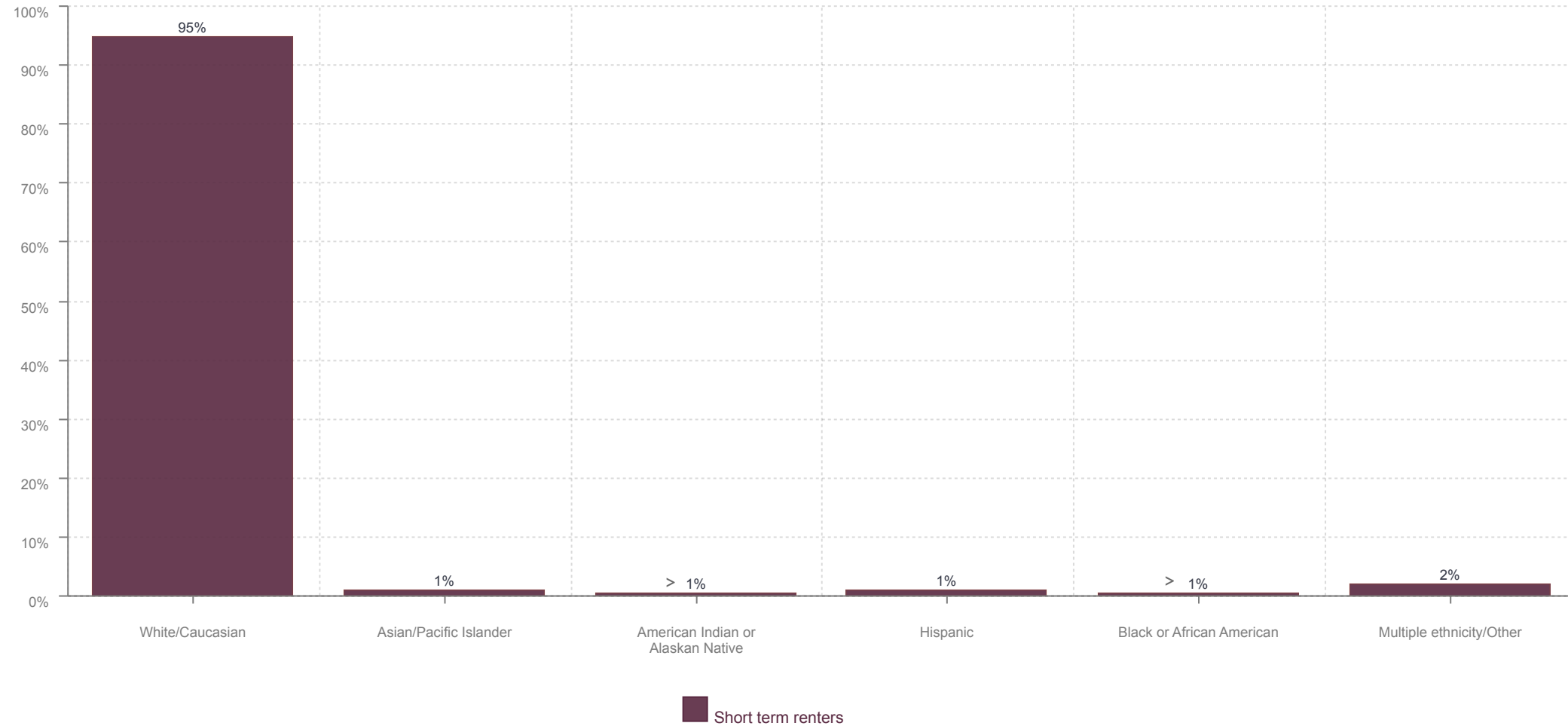
Ethnicity

Day trippers



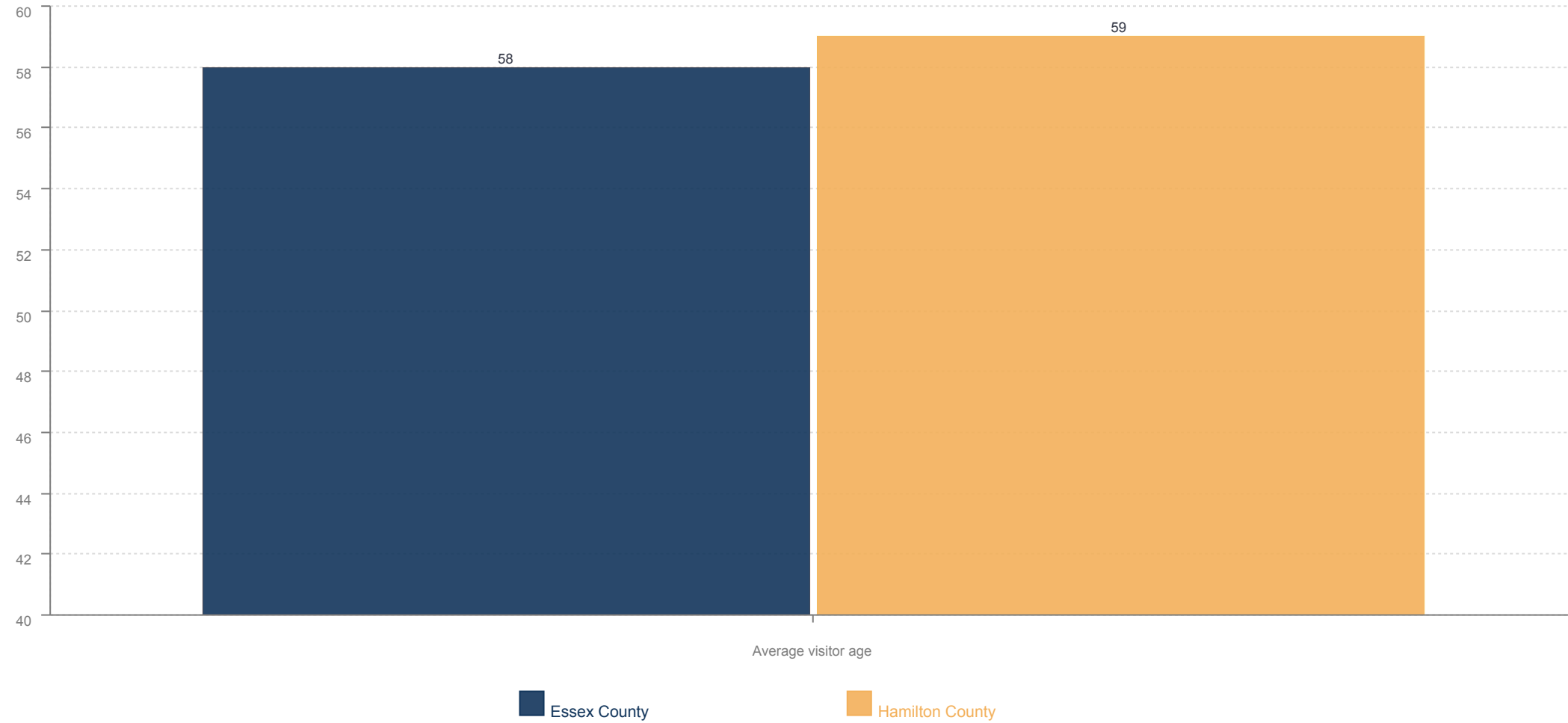
Ethnicity

Short term renters



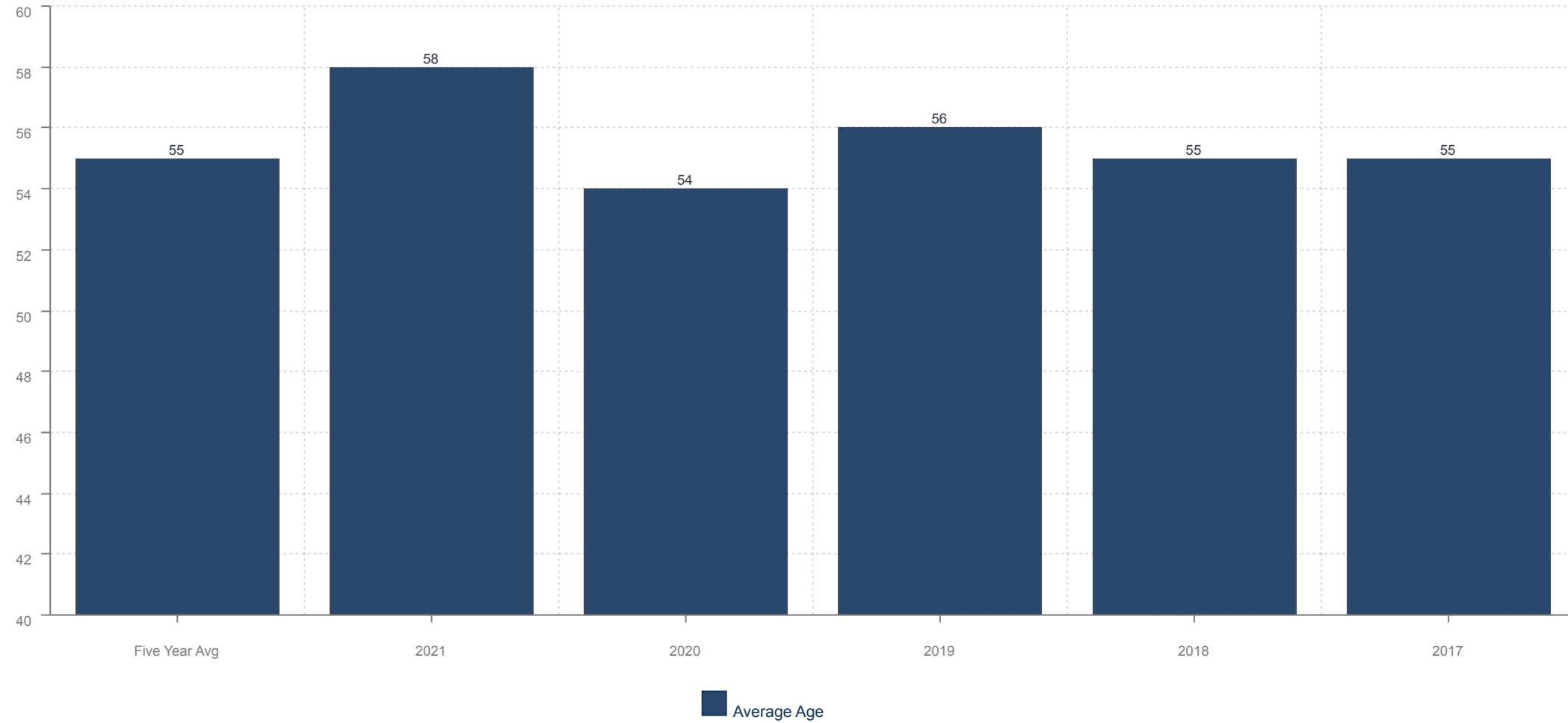
Average Age

All travelers



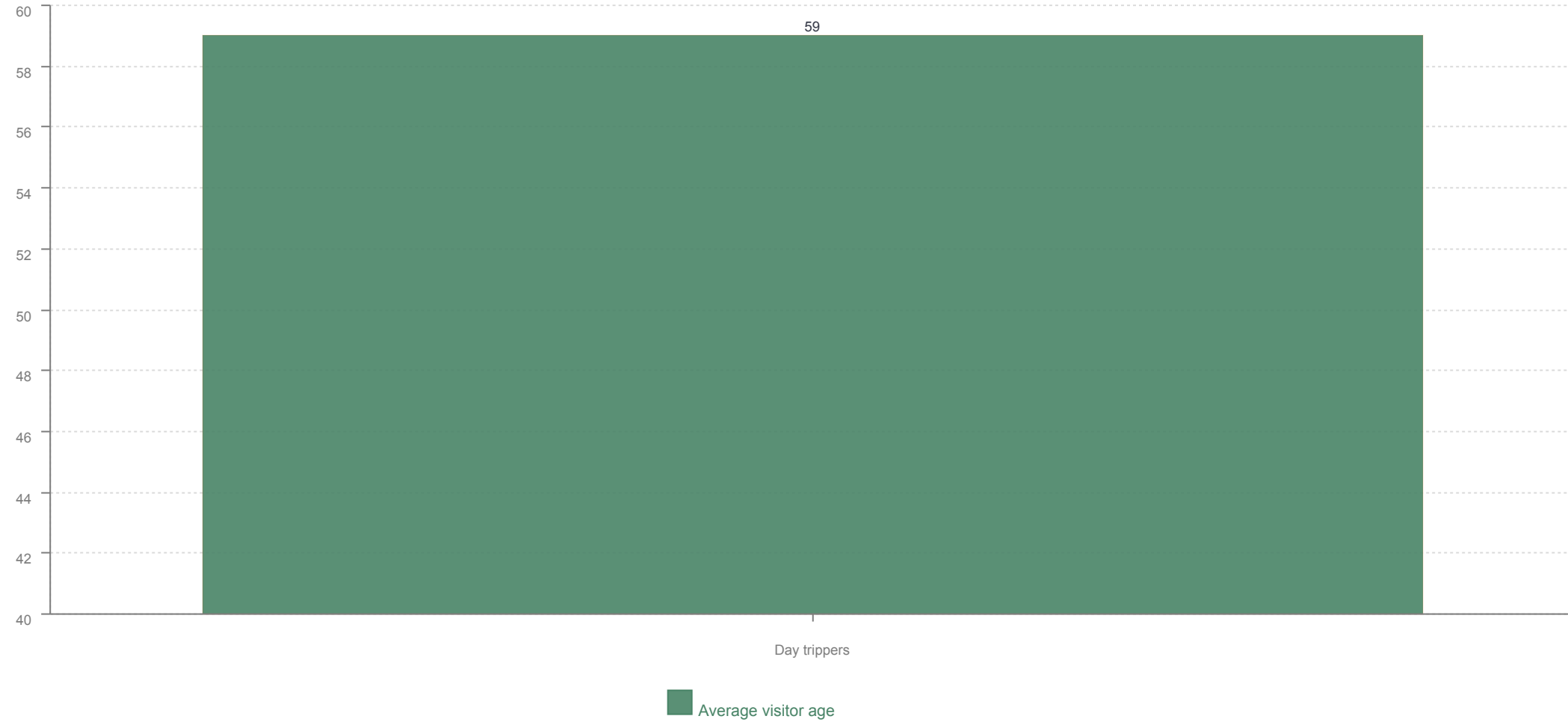
Five Year Average Age

Essex County travelers



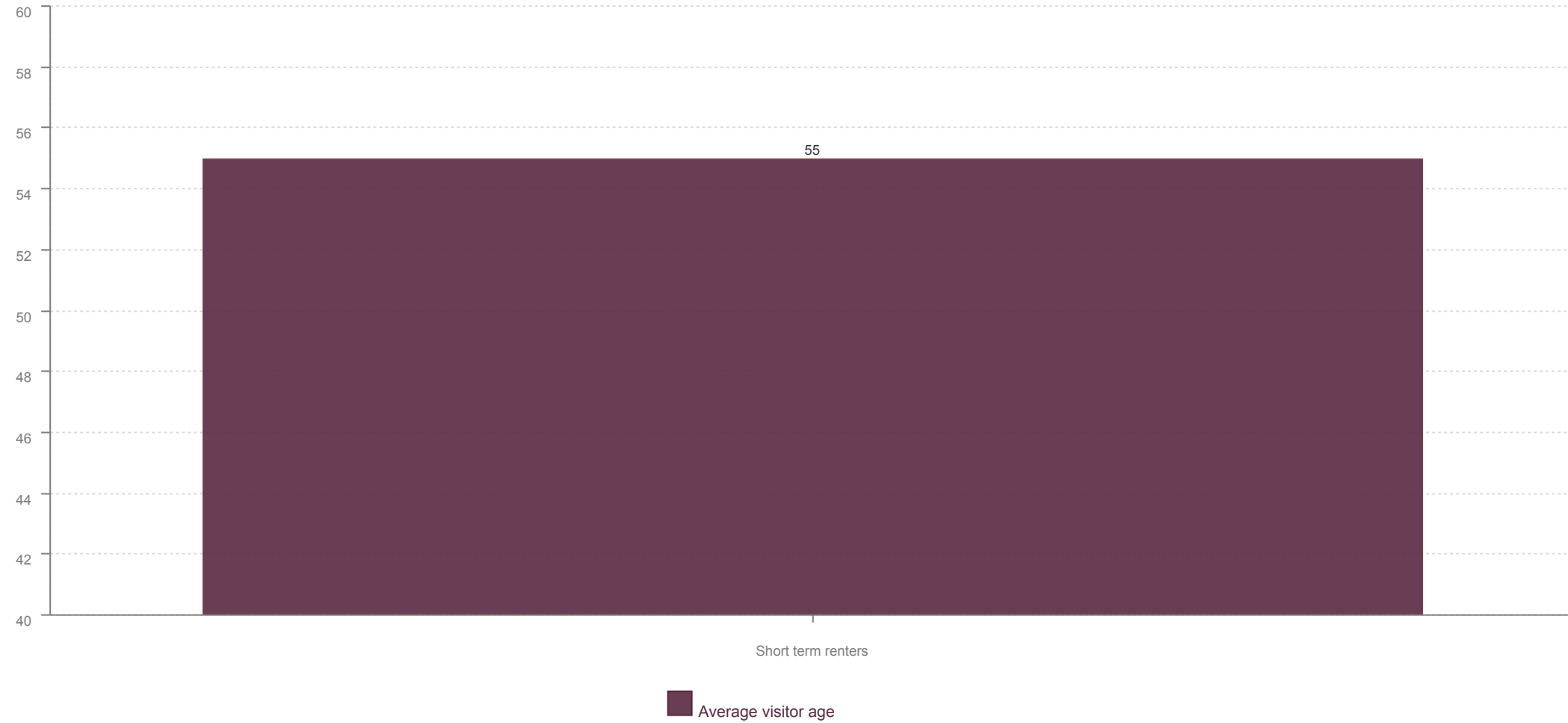
Average Age

Day trippers



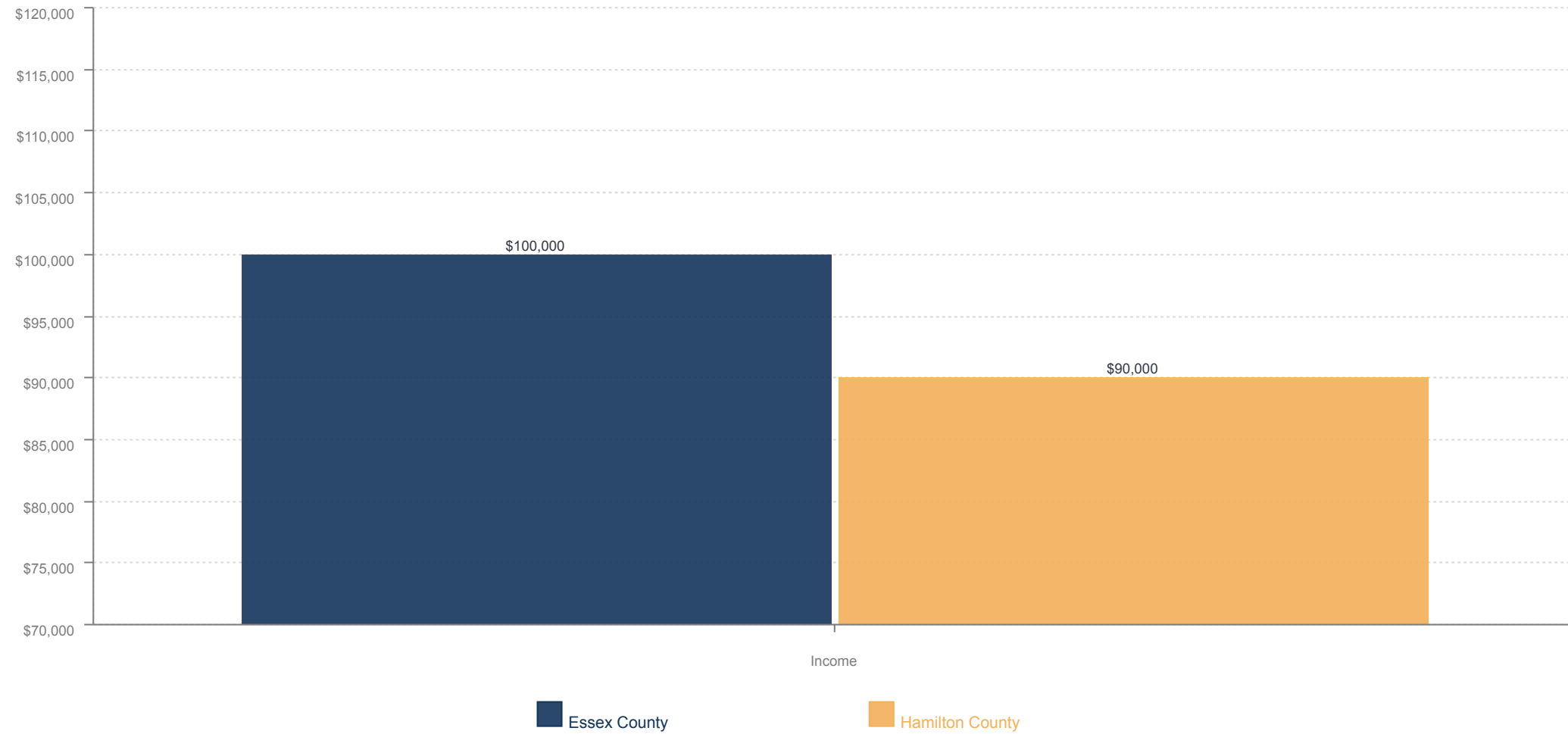
Average Age

Short term renters



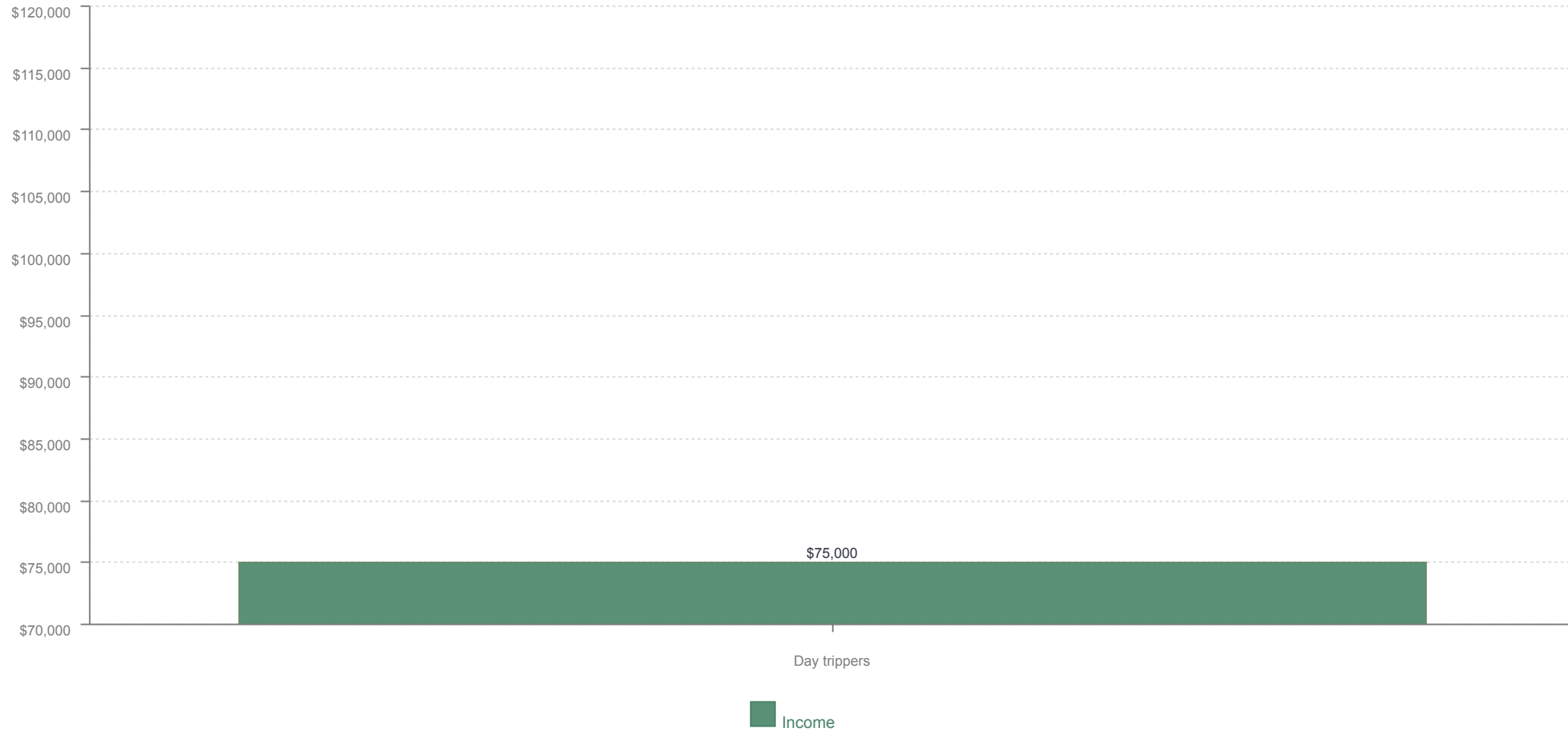
Average Income

All travelers



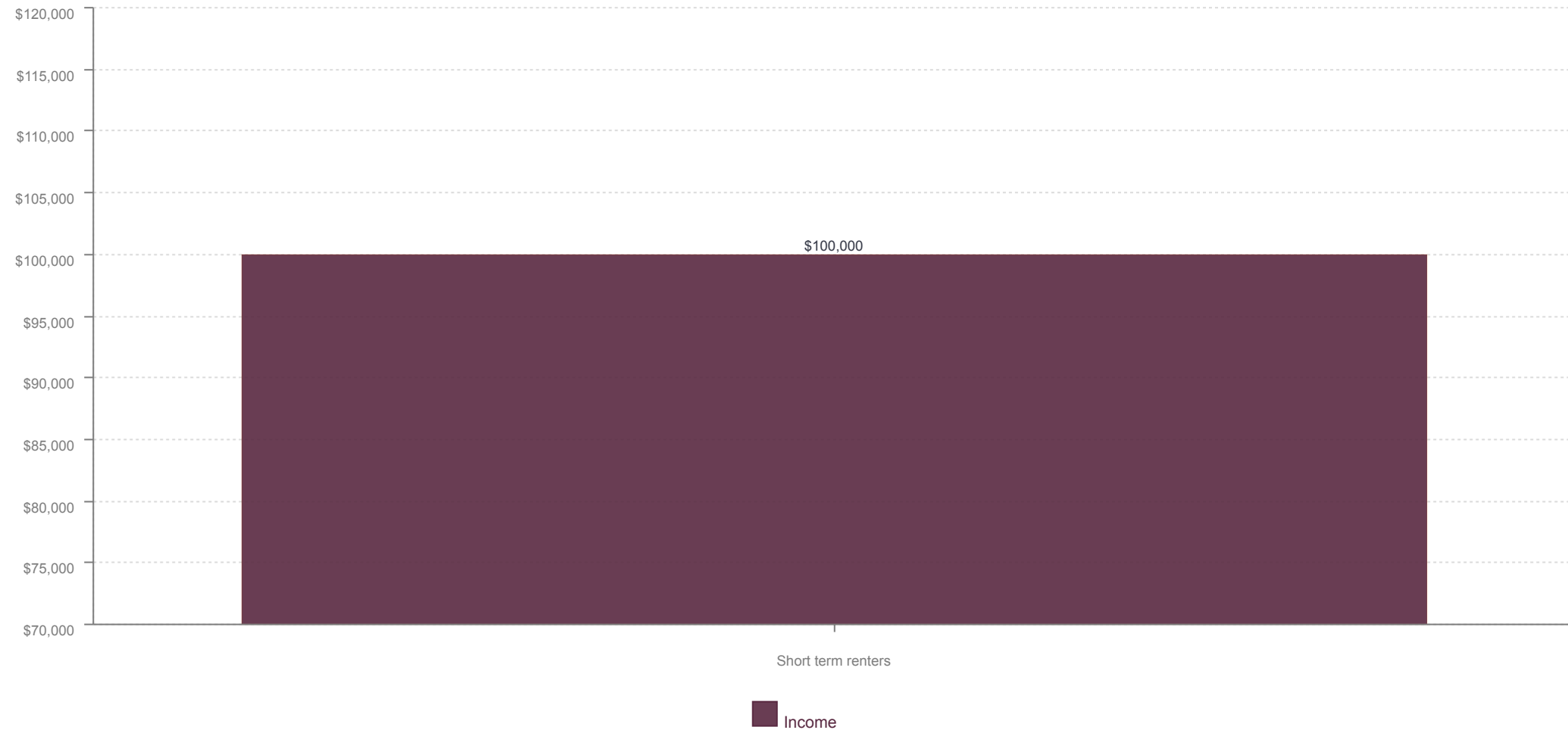
Average Income

Day trippers



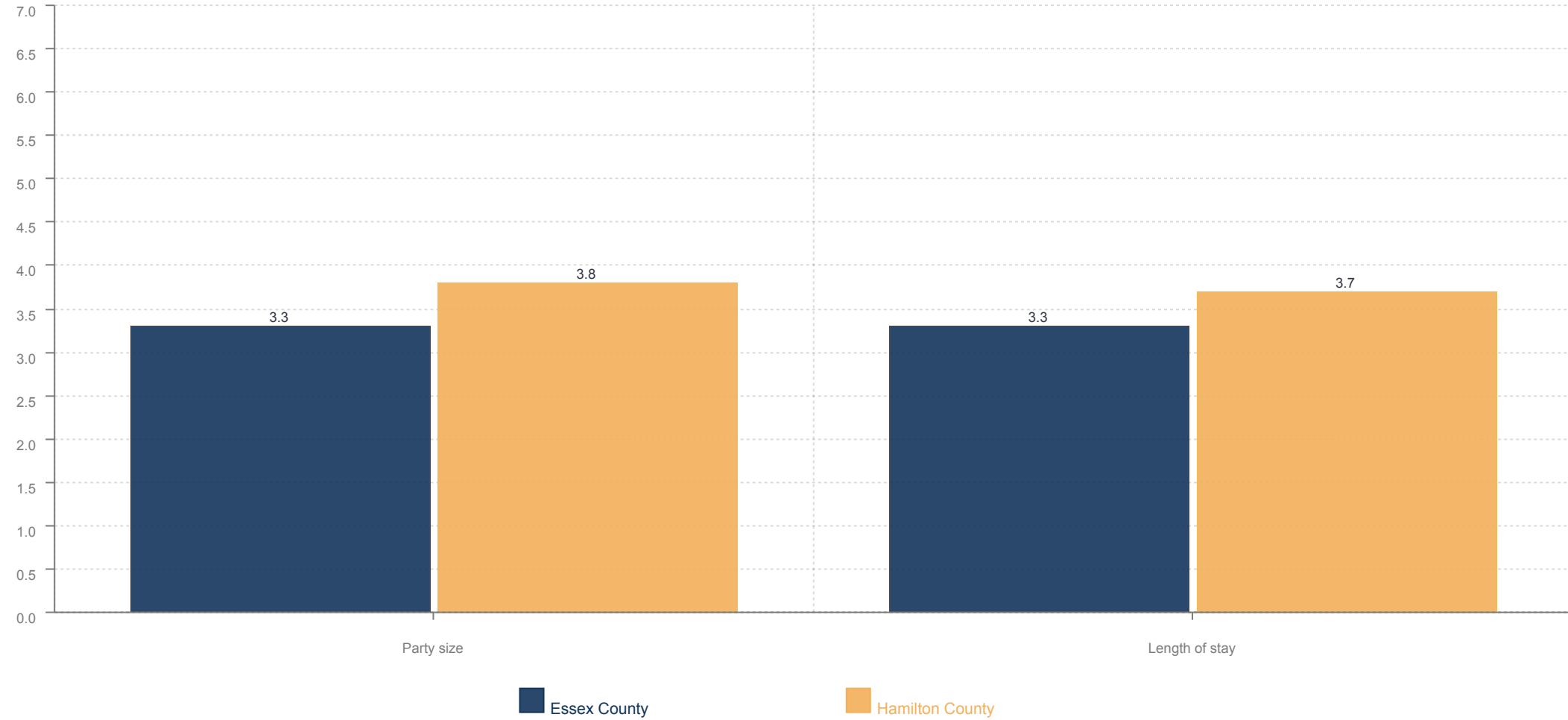
Average Income

Short term renters



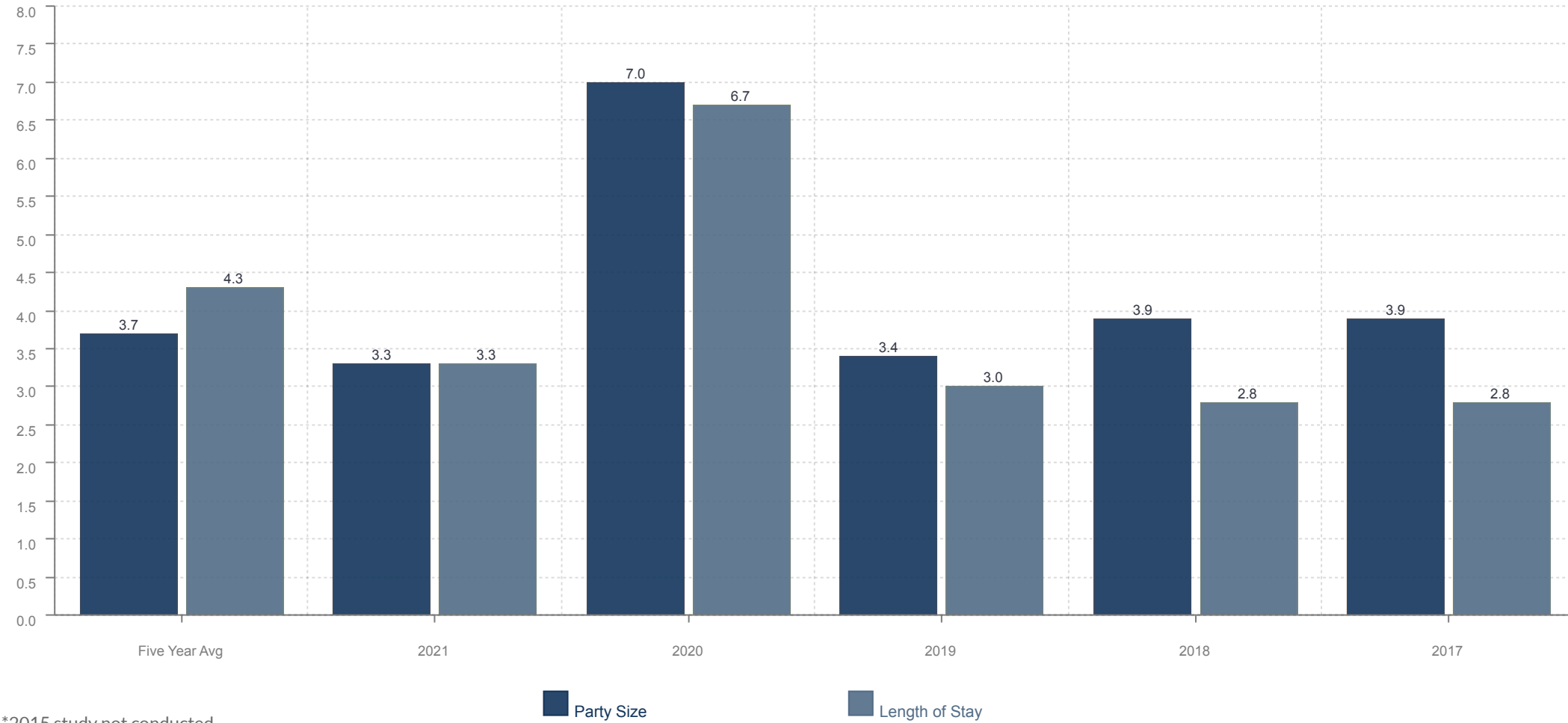
Party Size / Length of Stay

All travelers



Five Year Average Party Size / Length of Stay*

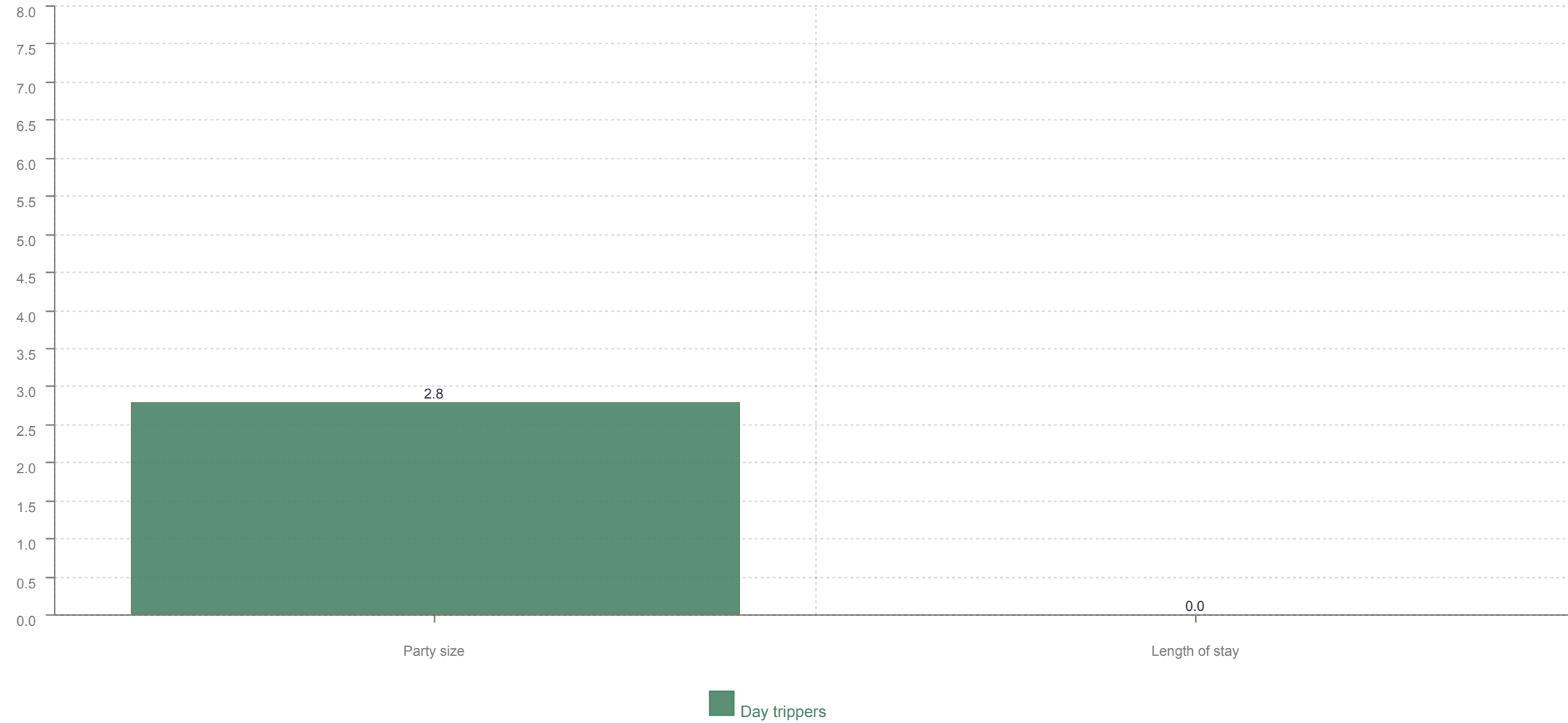
Essex County travelers



*2015 study not conducted

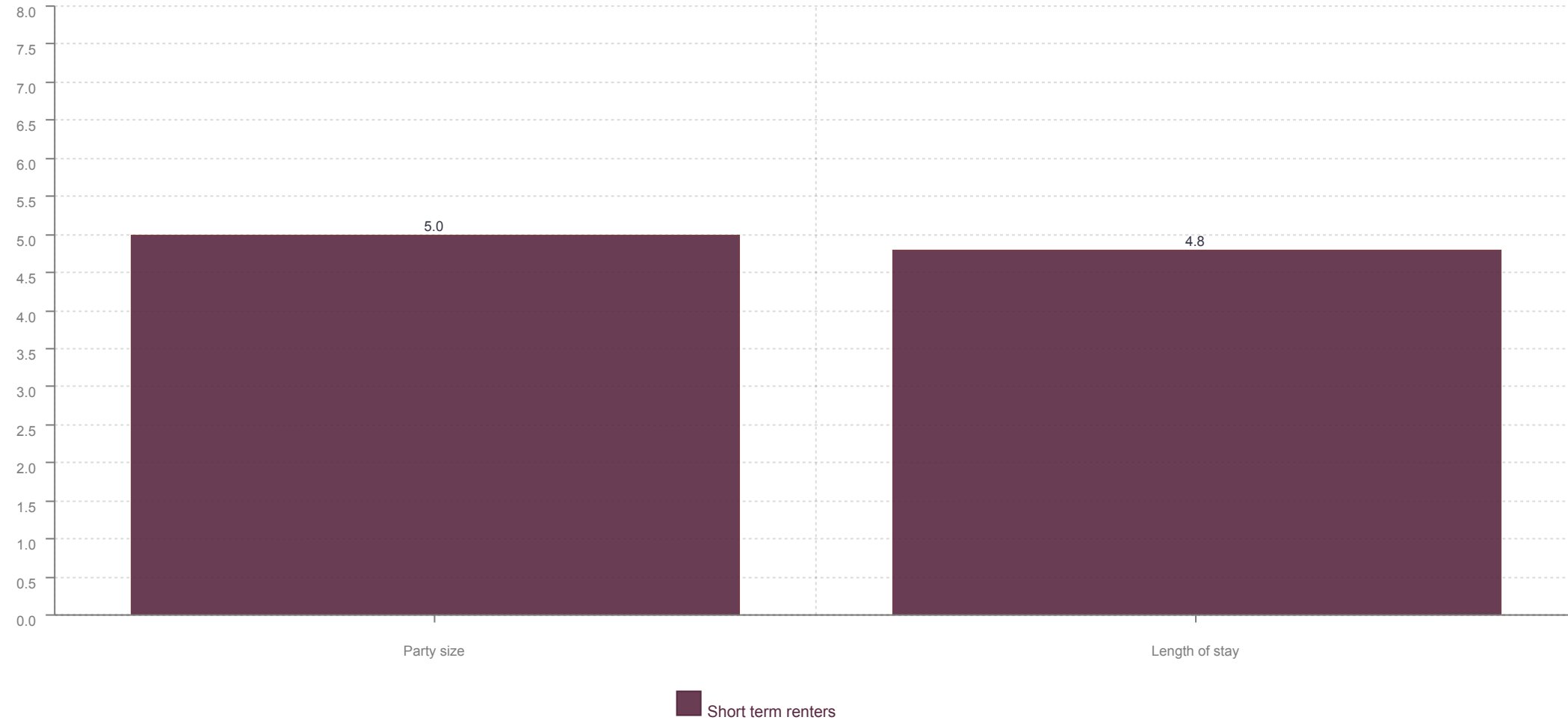
Party Size / Length of Stay

Day trippers



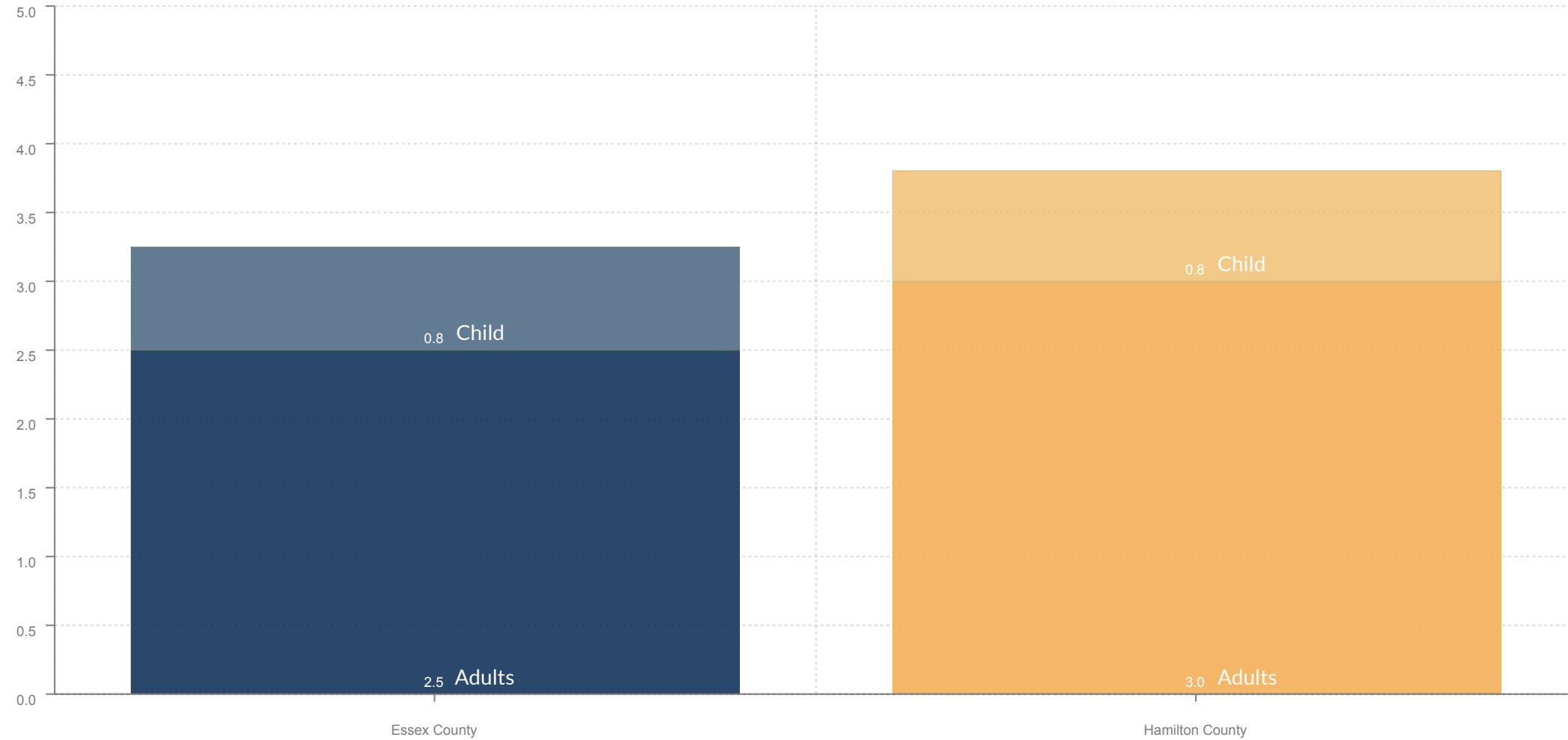
Party Size / Length of Stay

Short term renters



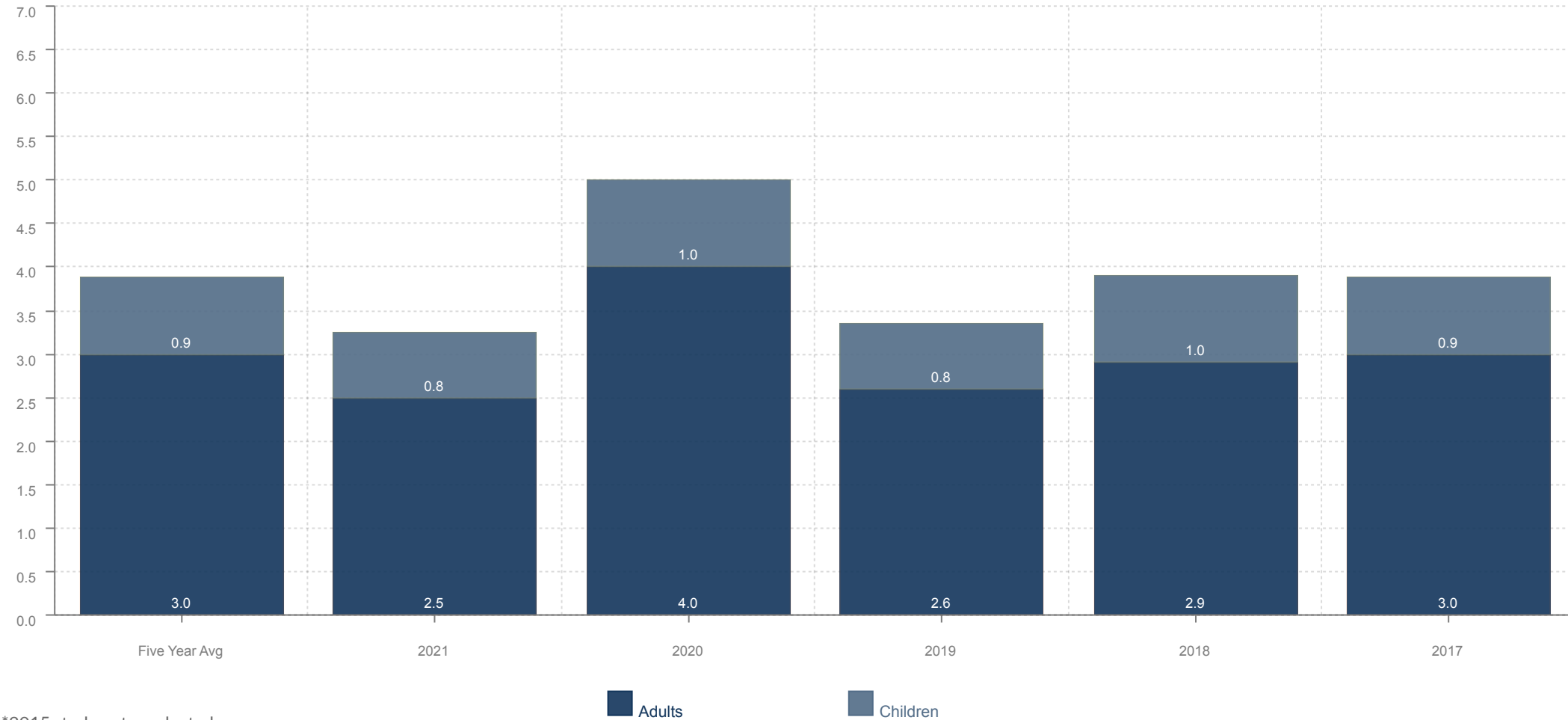
Party Composition

All travelers



Five Year Average Party Composition

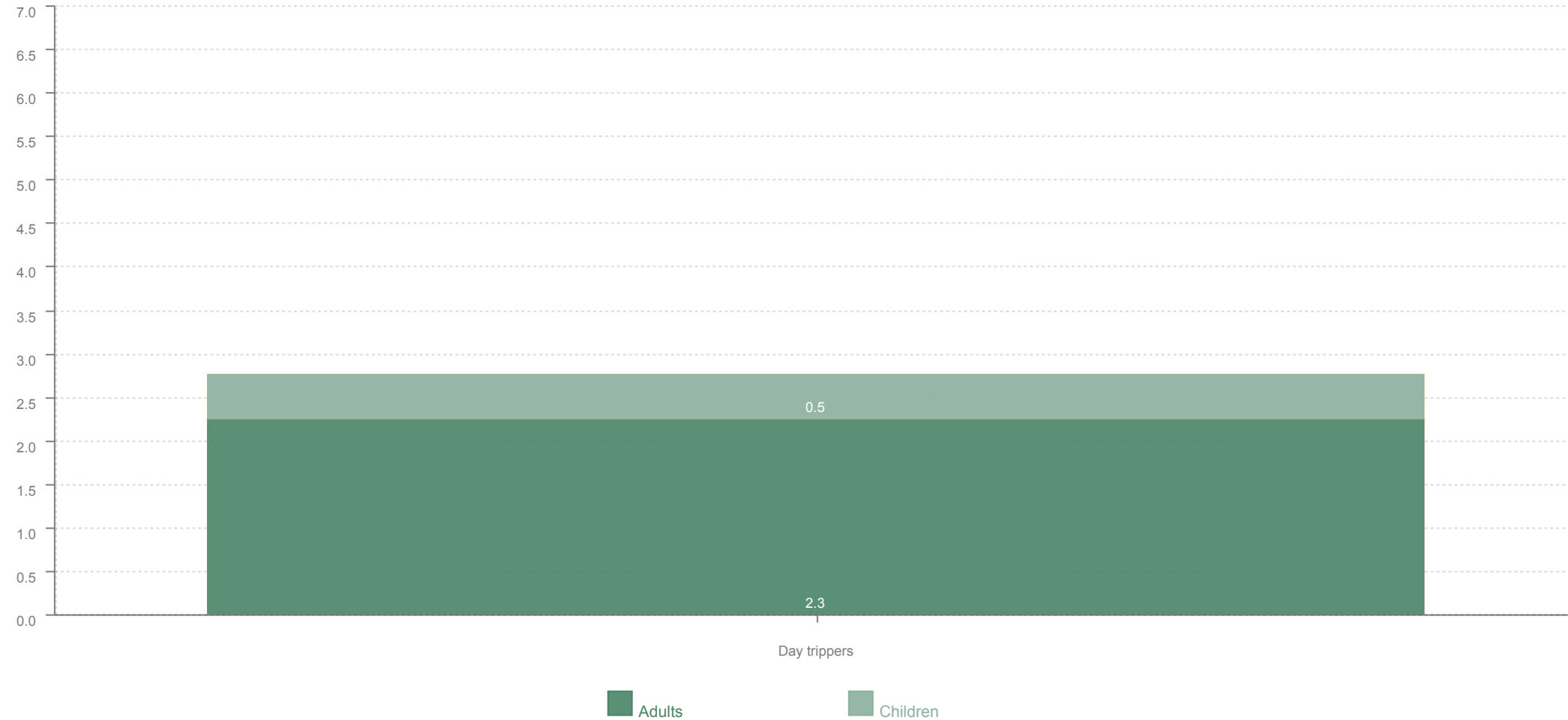
Essex County travelers



*2015 study not conducted

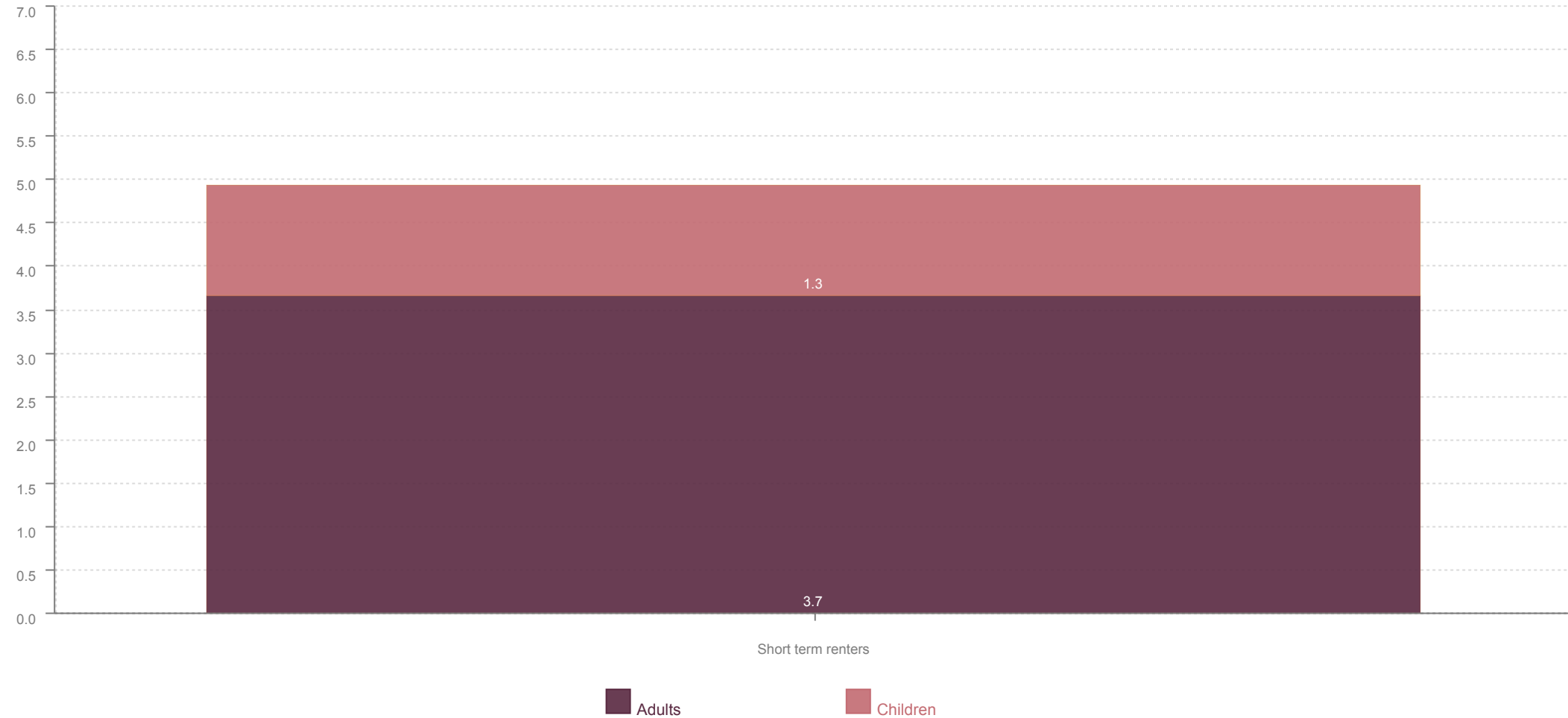
Party Composition

Day trippers



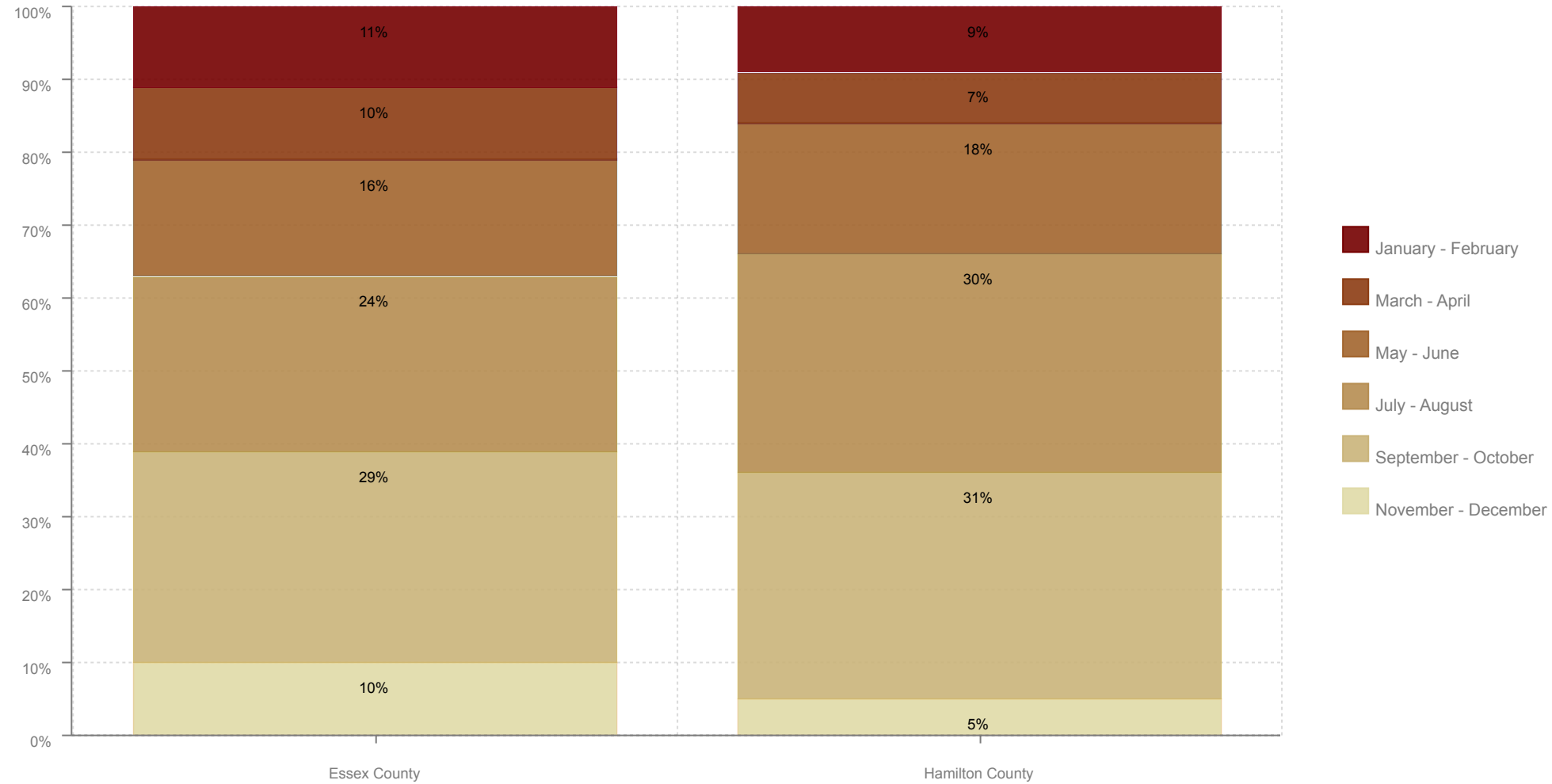
Party Composition

Short term renters



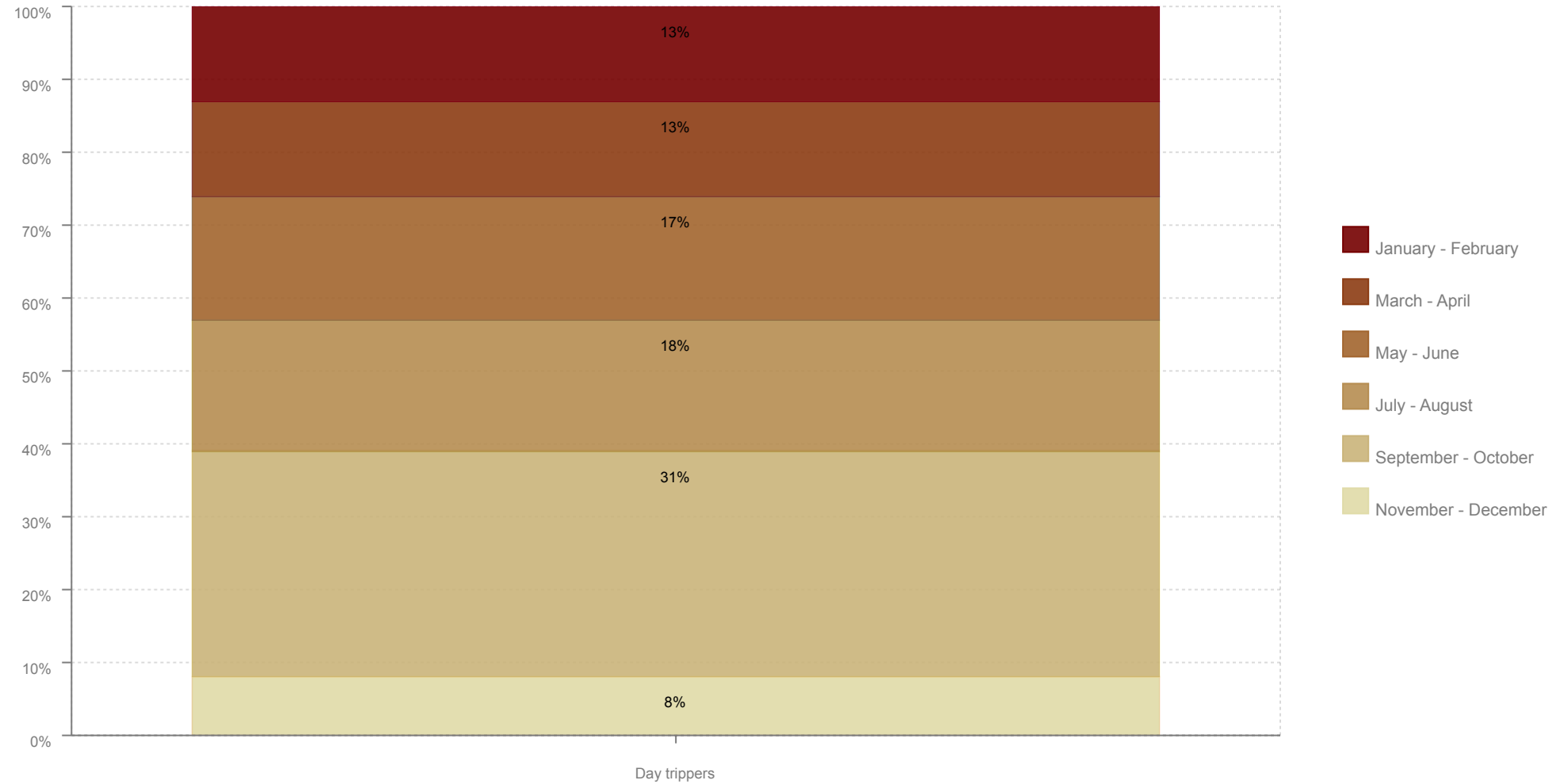
Time of Year Visited

All travelers



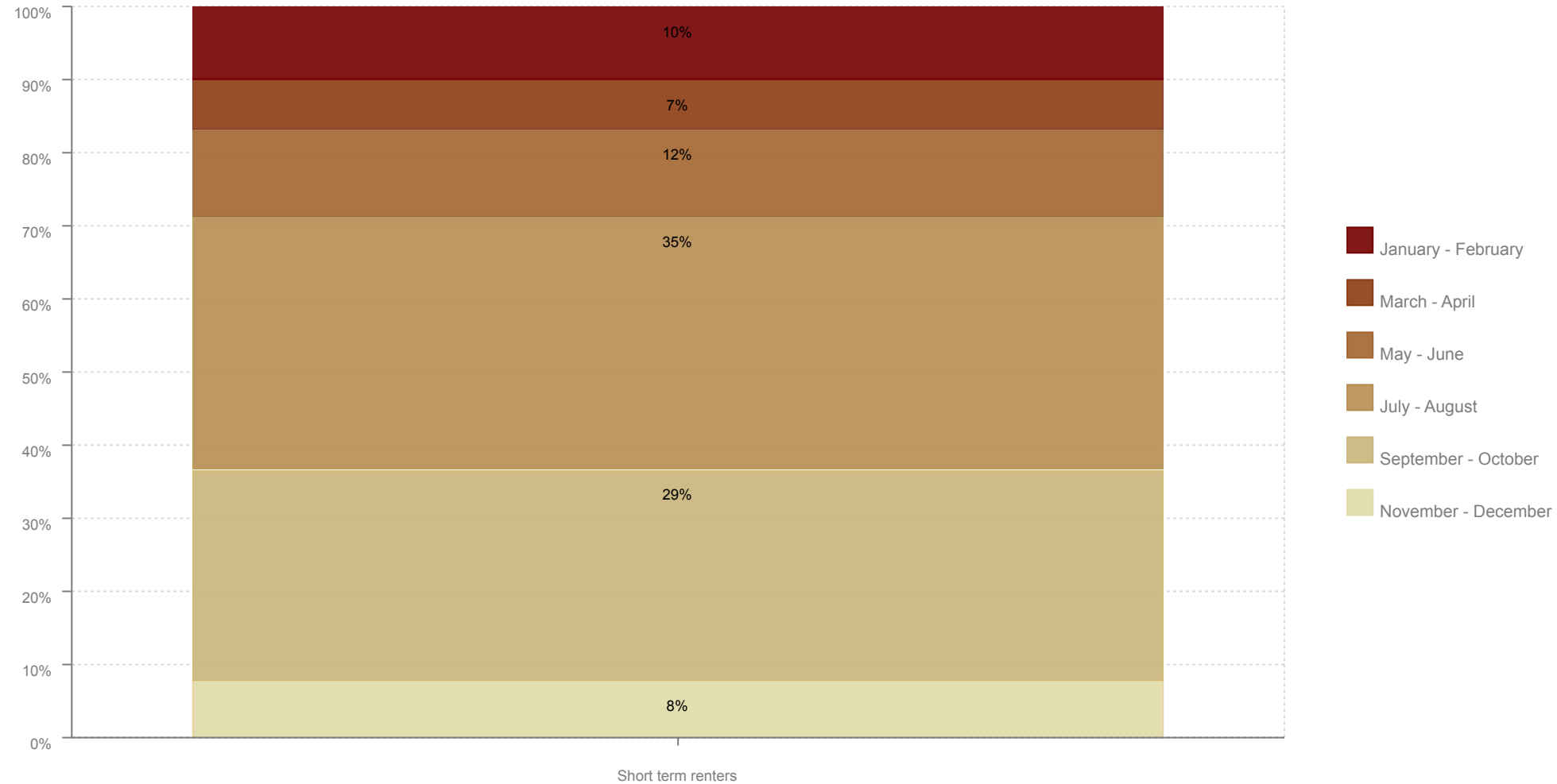
Time of Year Visited

Day trippers



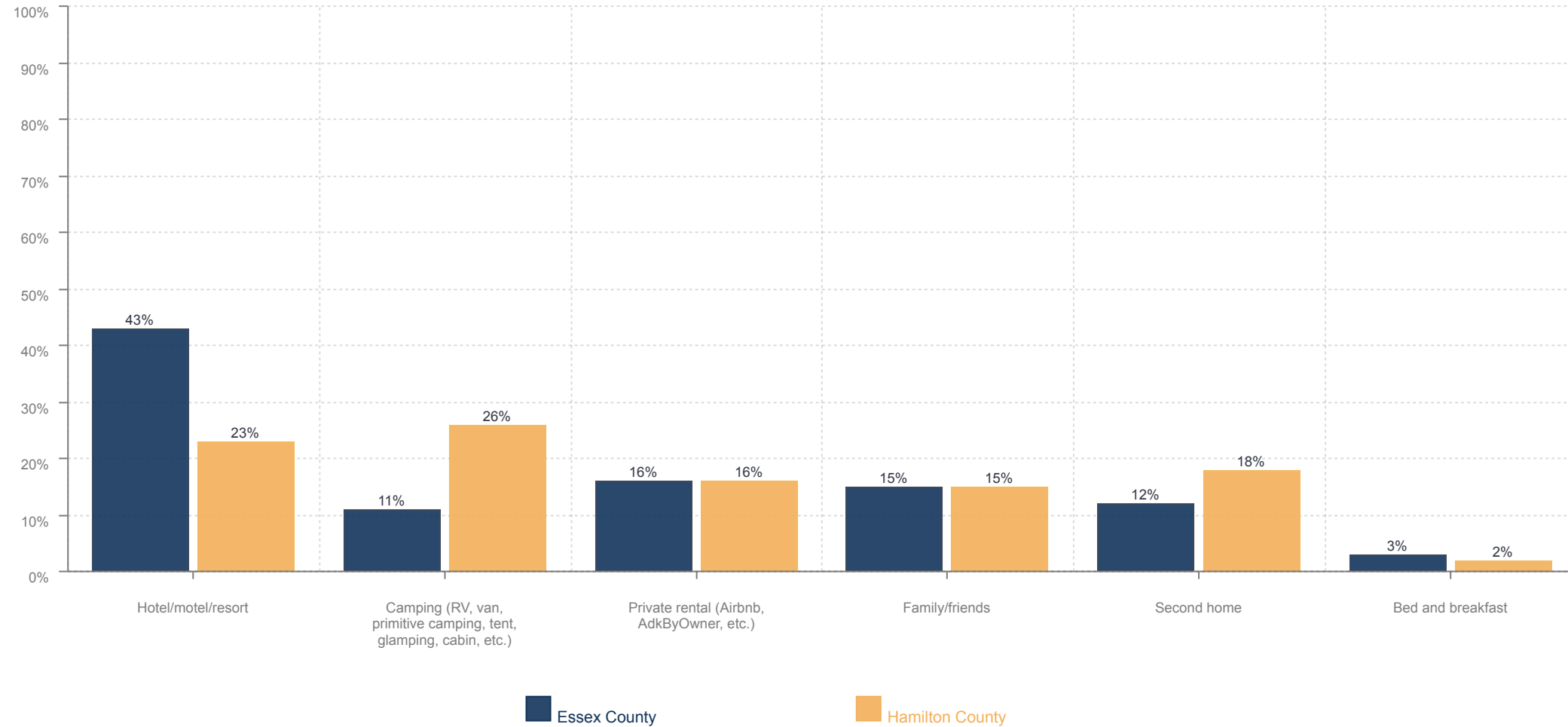
Time of Year Visited

Short term renters



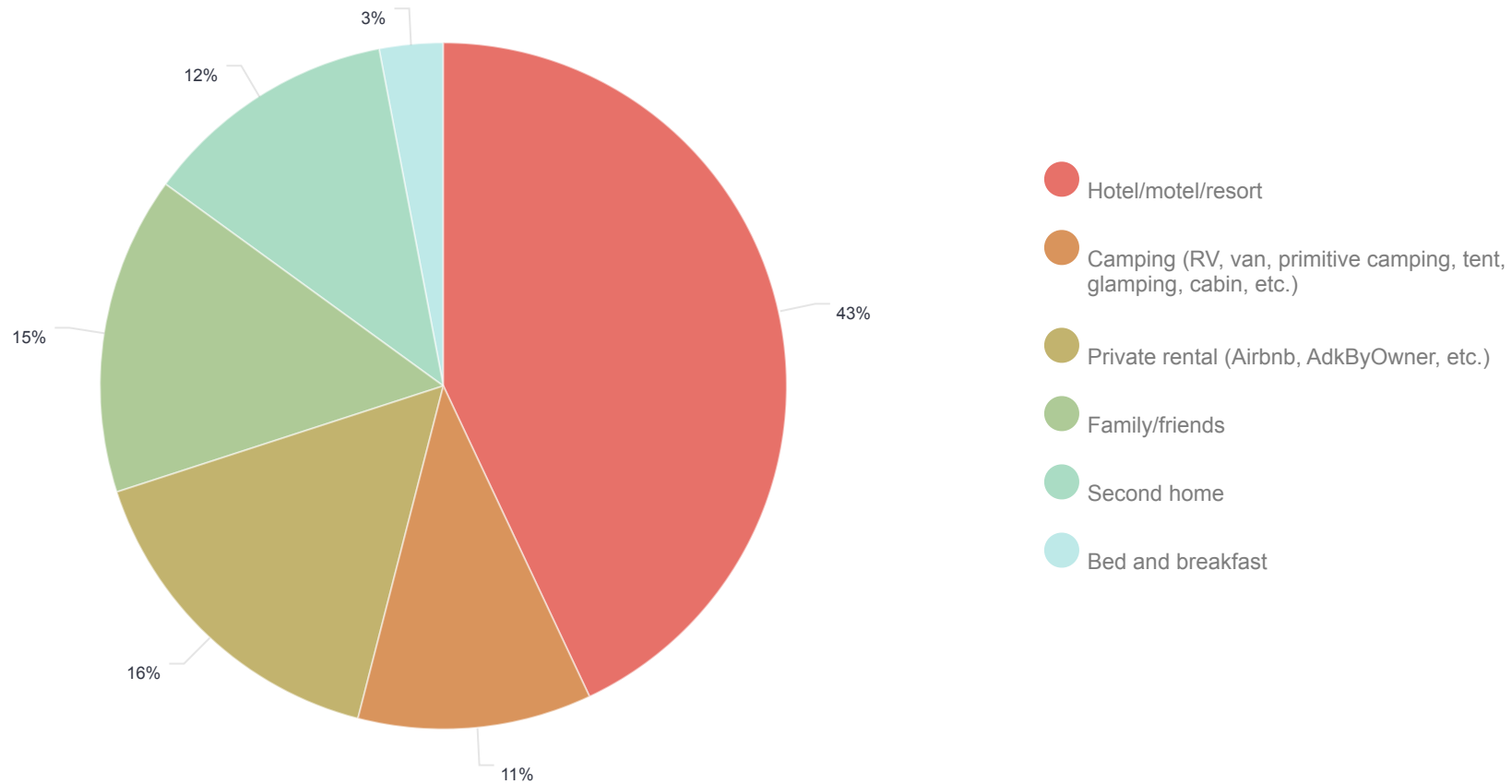
Lodging Accommodations

All travelers



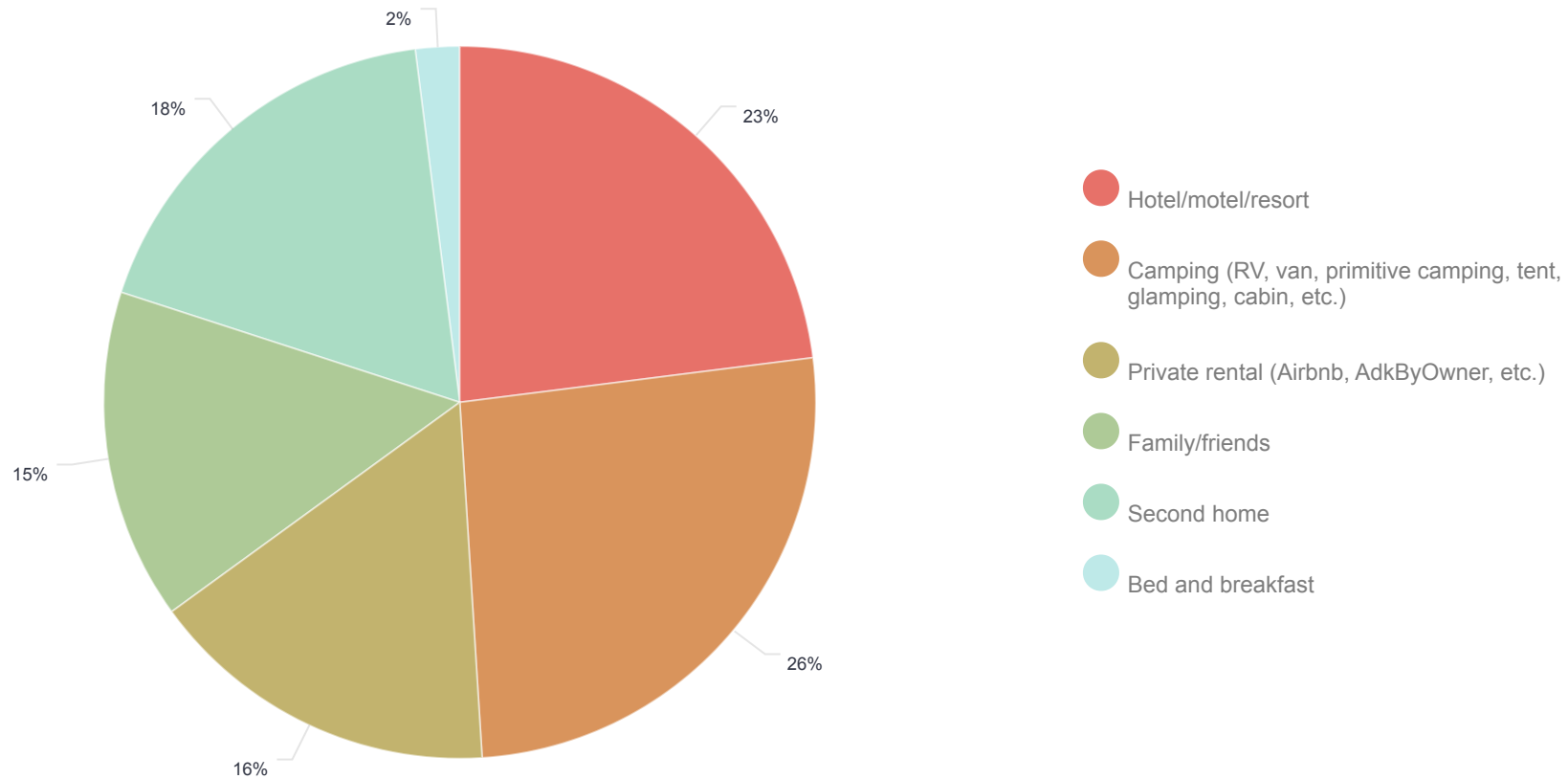
Lodging Accommodations

Essex County travelers



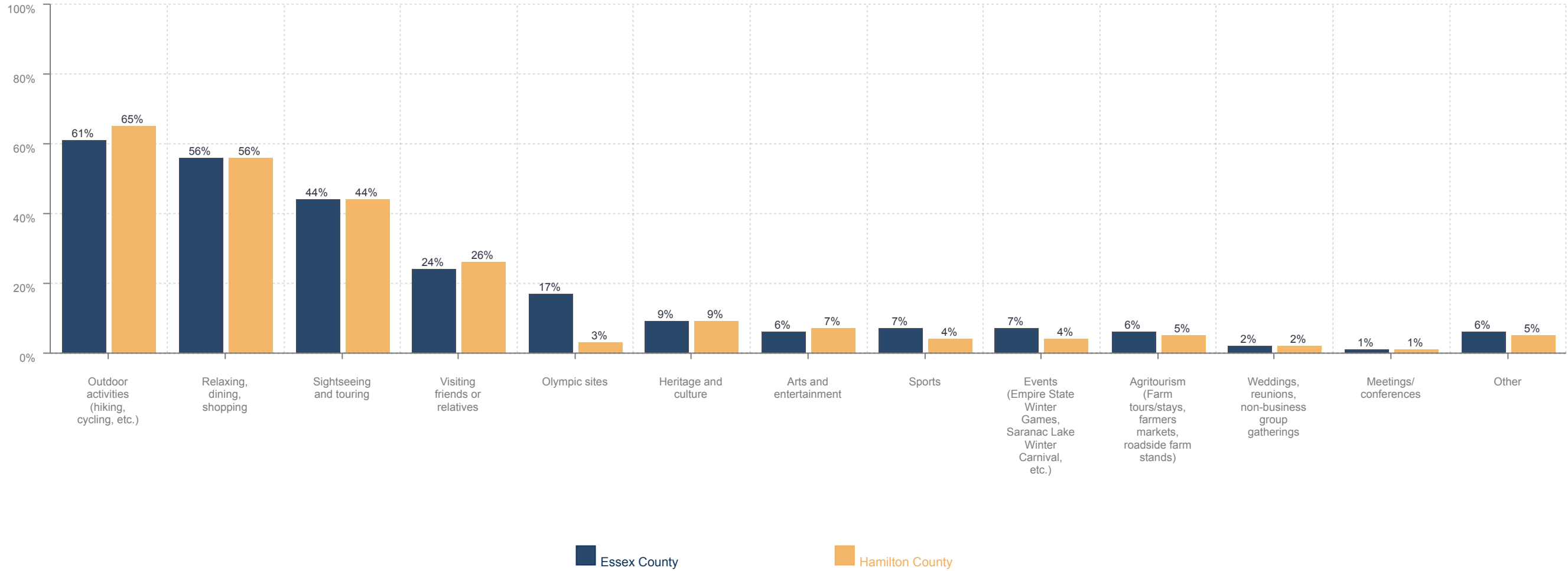
Lodging Accommodations

Hamilton County travelers



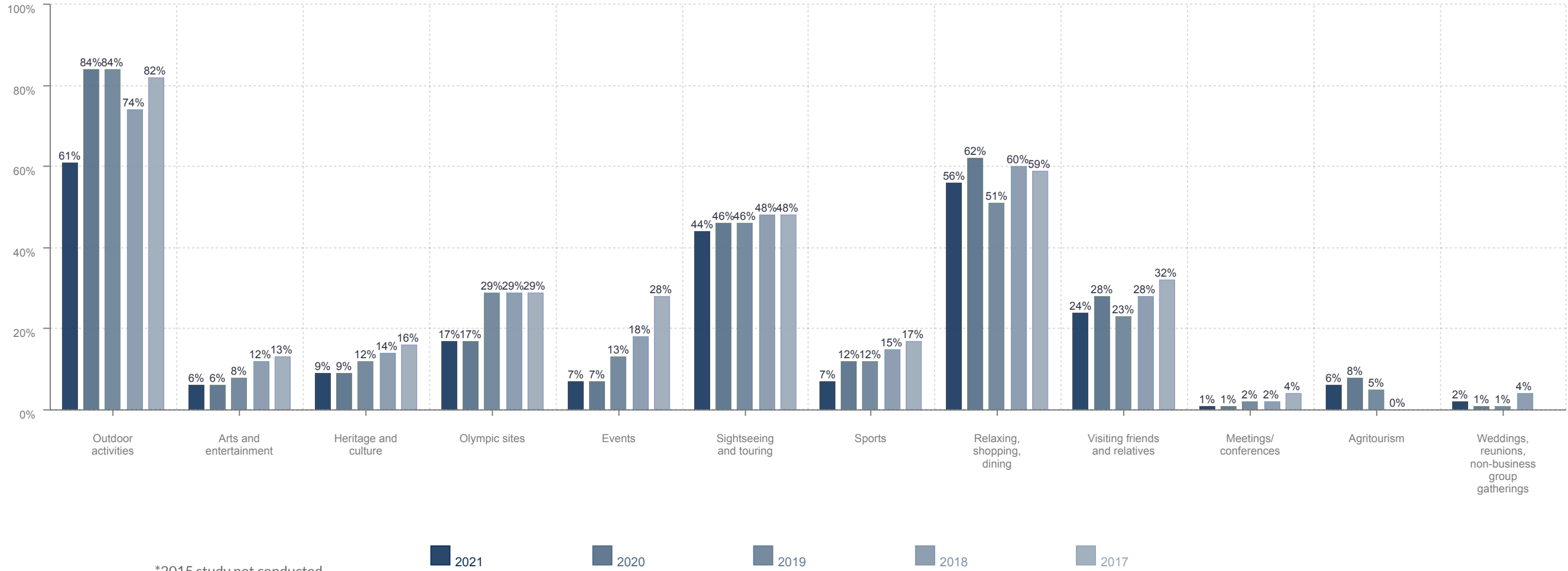
Key Attractions

All travelers



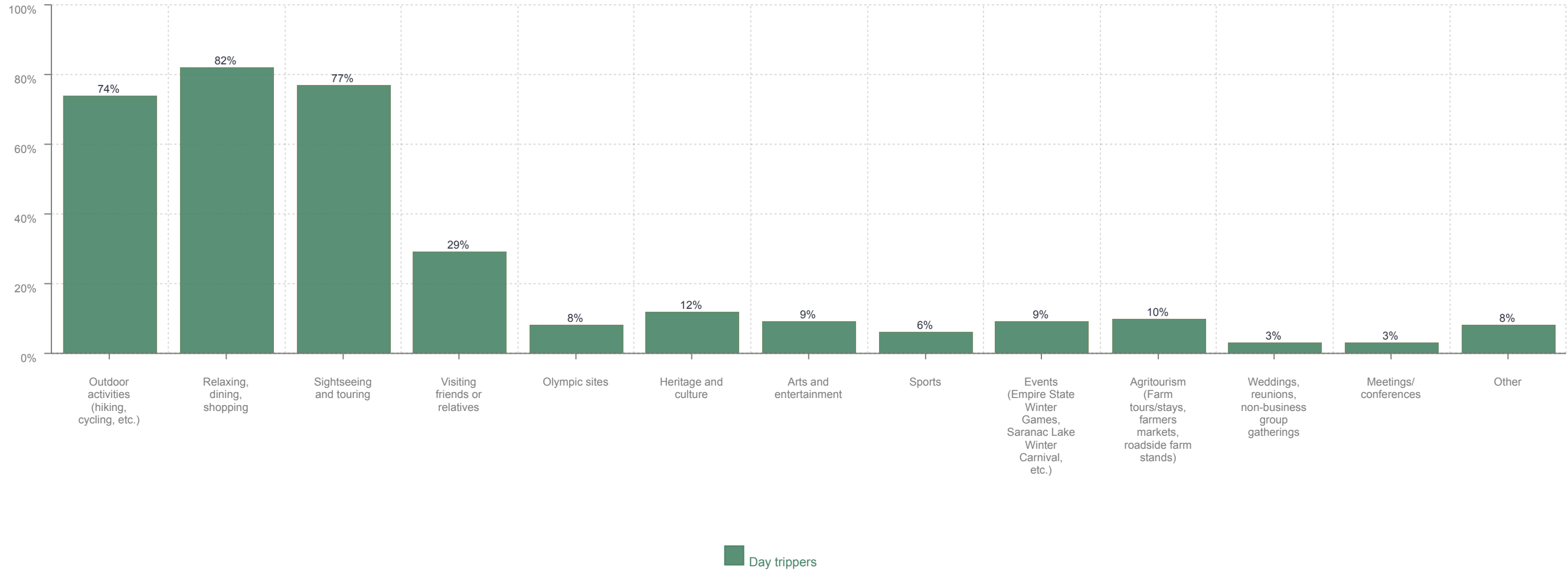
Five Year Key Attractions*

Essex County travelers



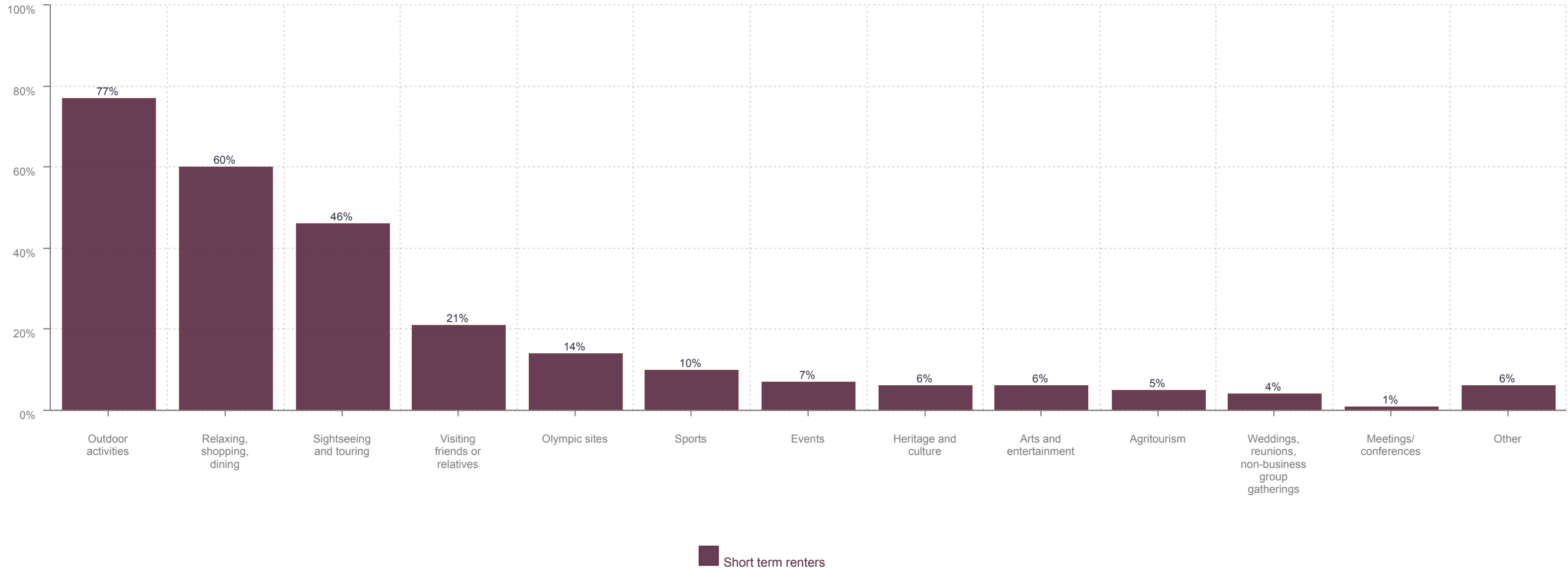
Key Attractions

Day trippers



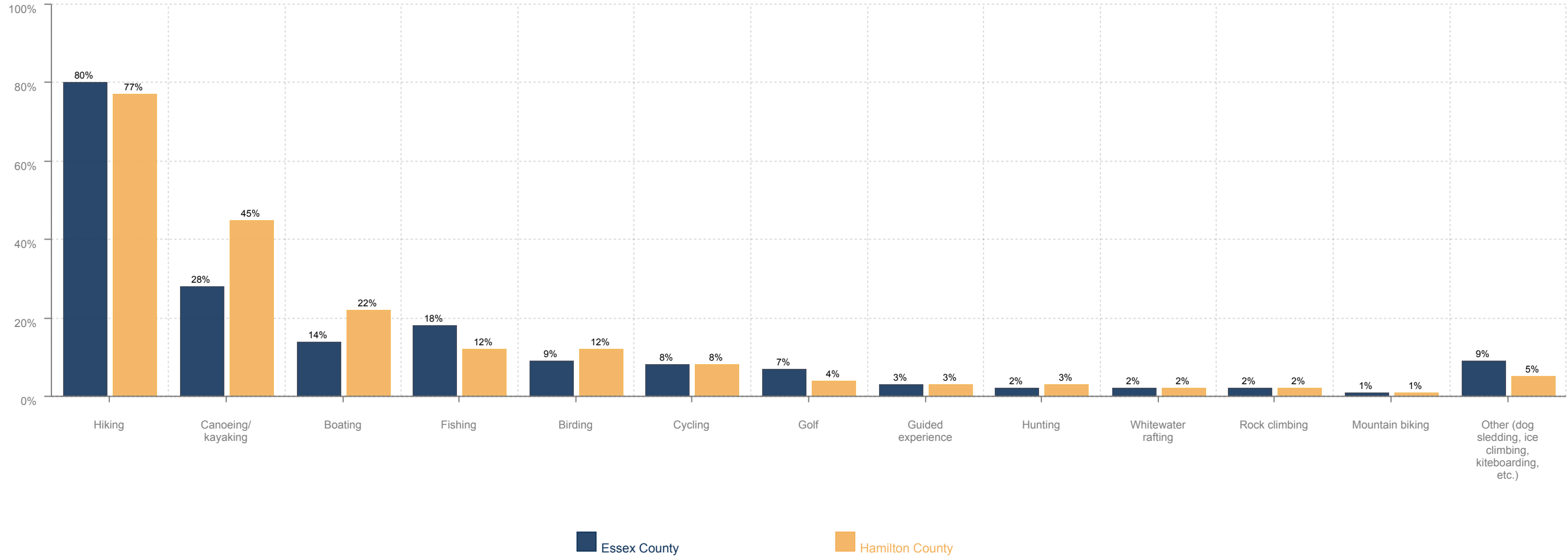
Key Attractions

Short term renters



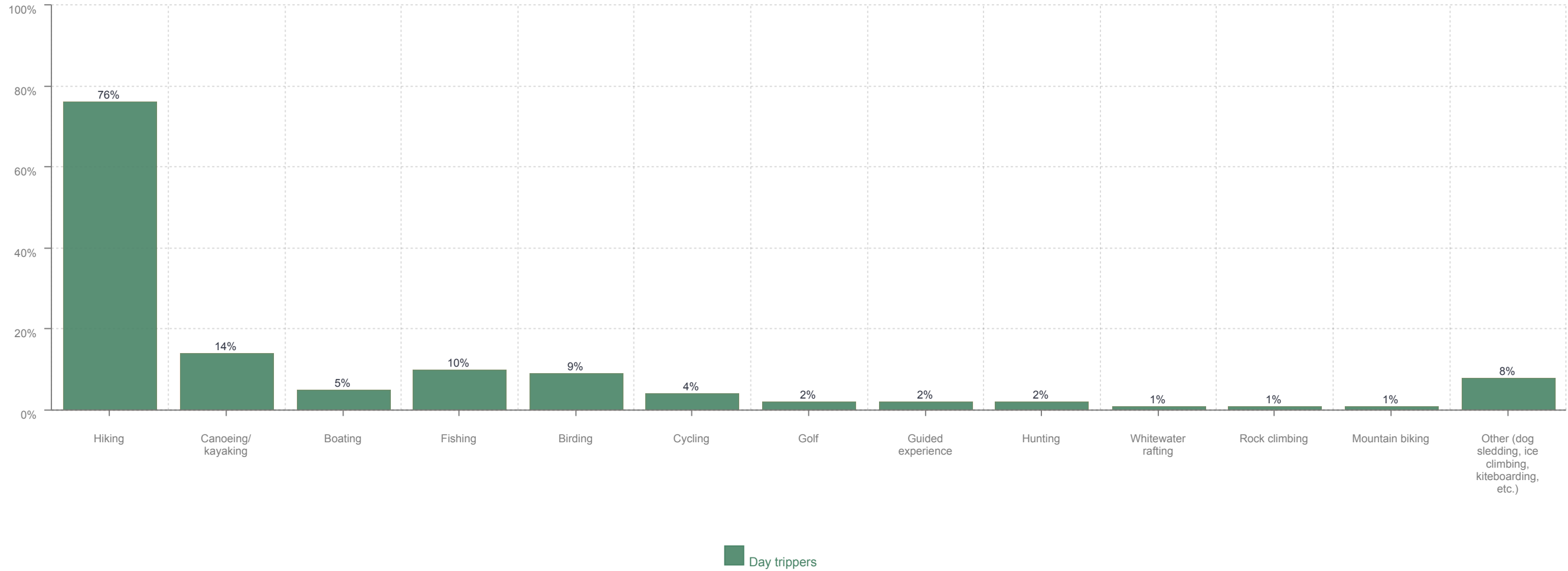
Outdoor Spring / Summer Activities

All travelers



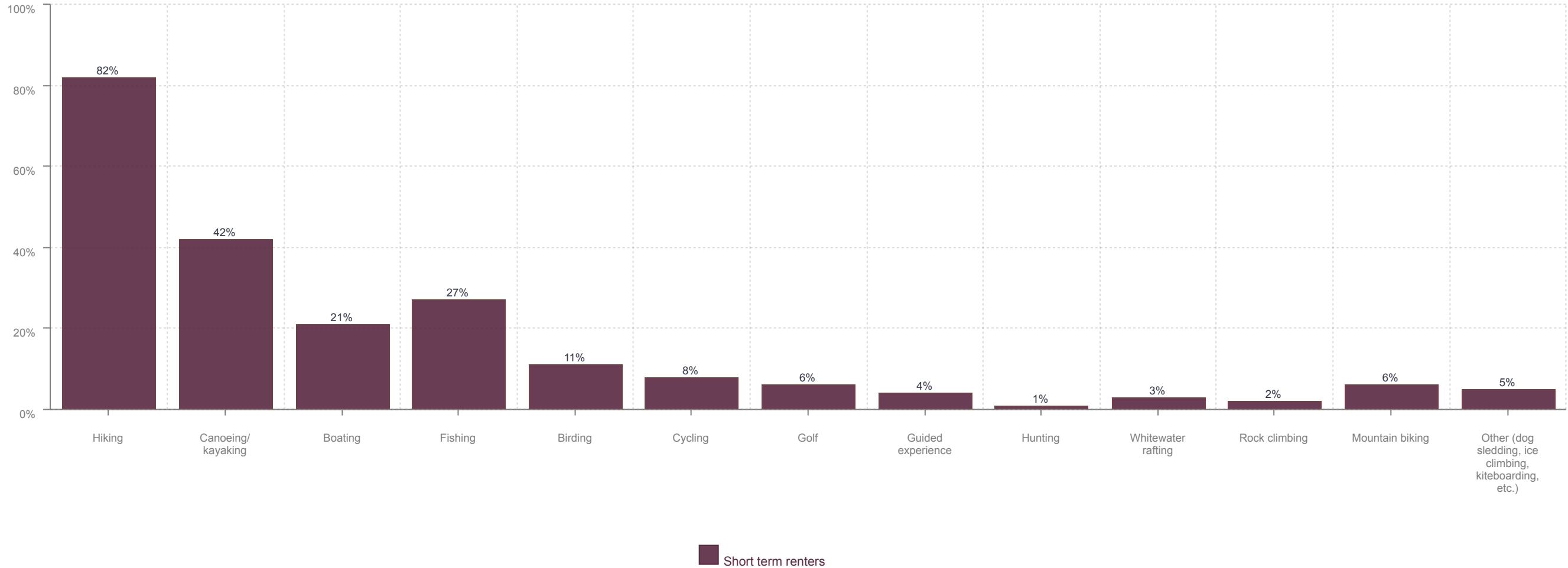
Outdoor Spring / Summer Activities

Day trippers



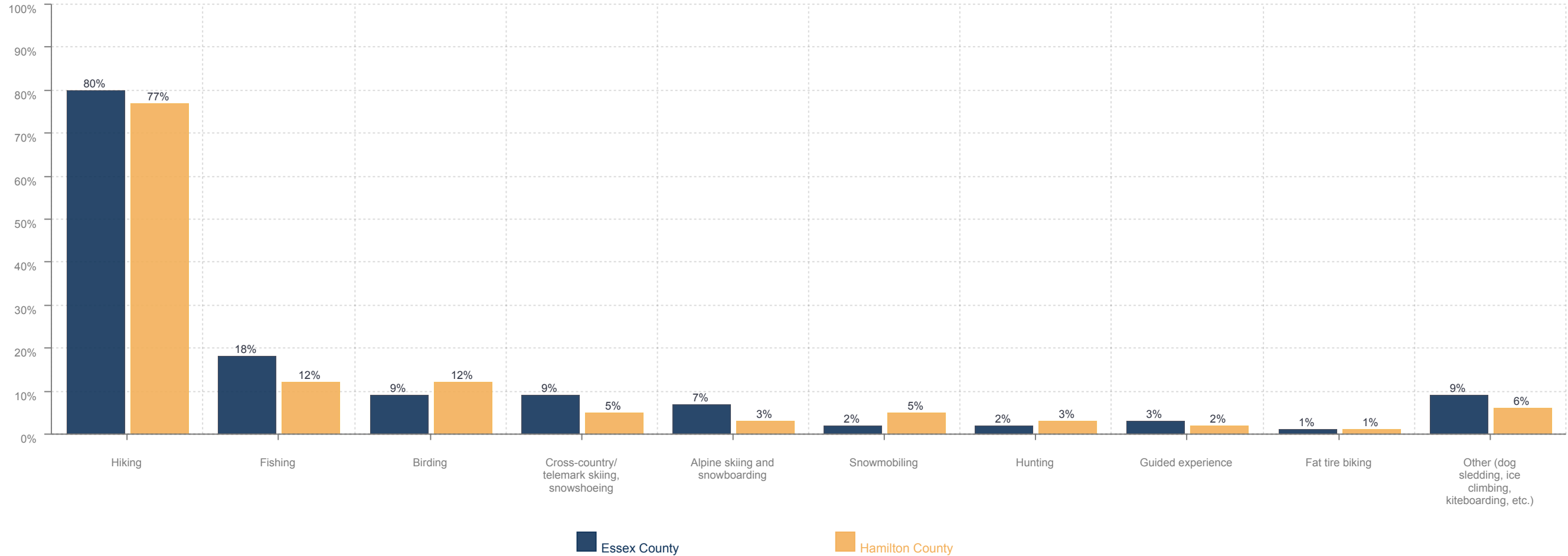
Outdoor Spring / Summer Activities

Short term renters



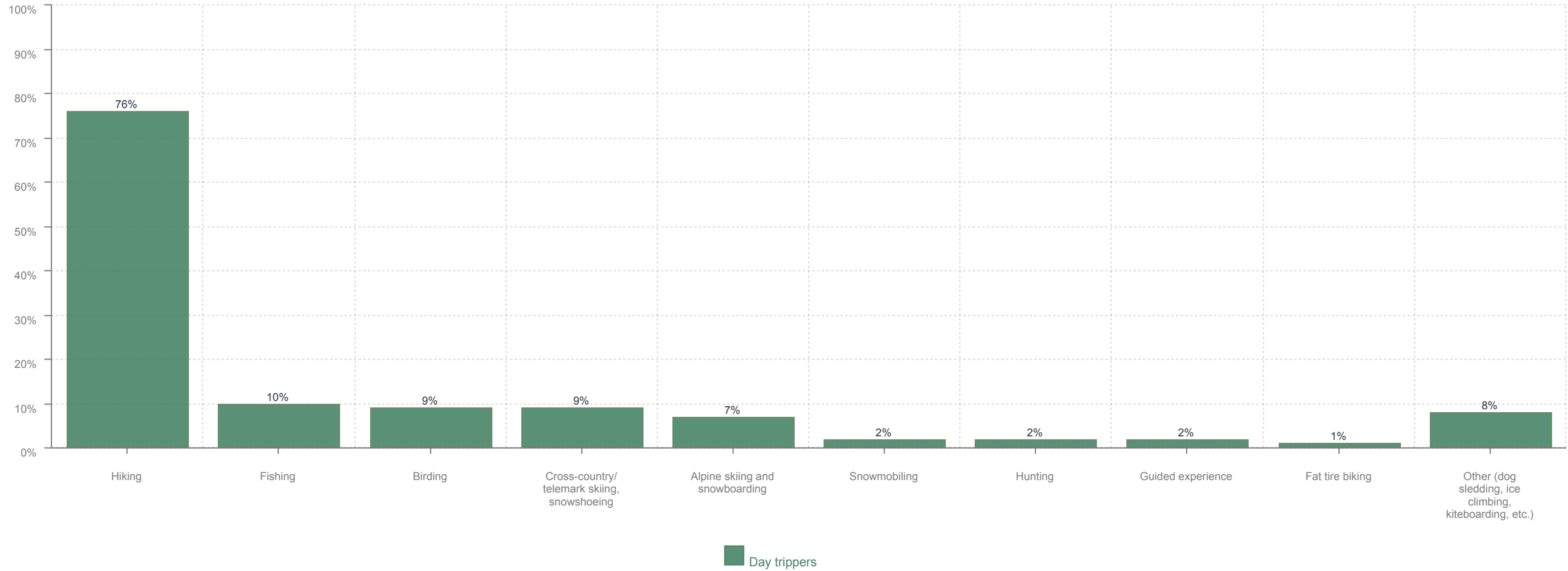
Outdoor Fall / Winter Activities

All travelers



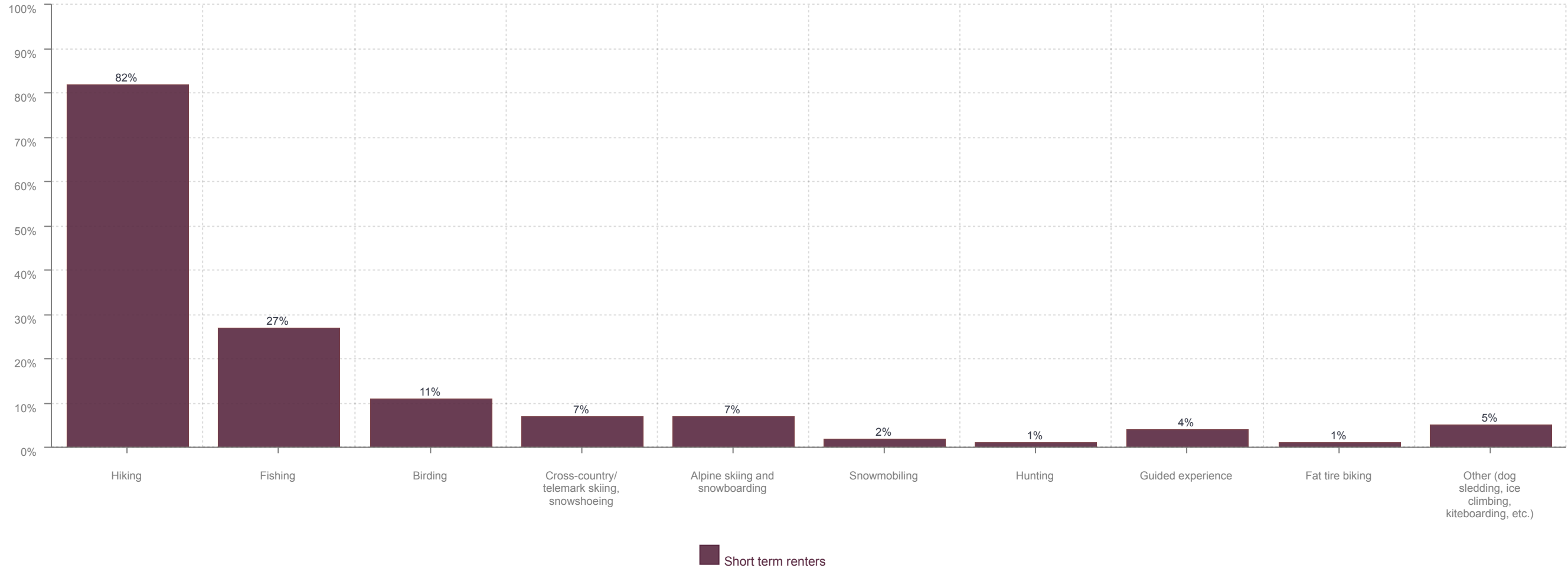
Outdoor Fall / Winter Activities

Day trippers



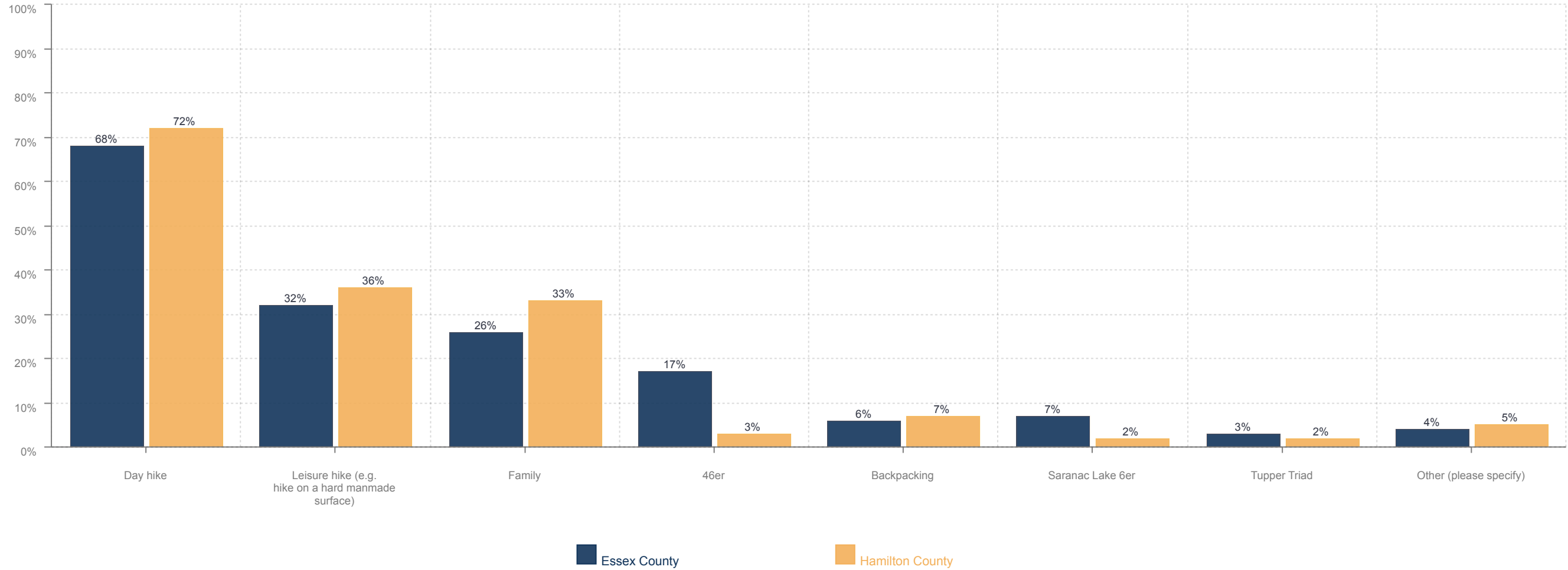
Outdoor Fall / Winter Activities

Short term renters



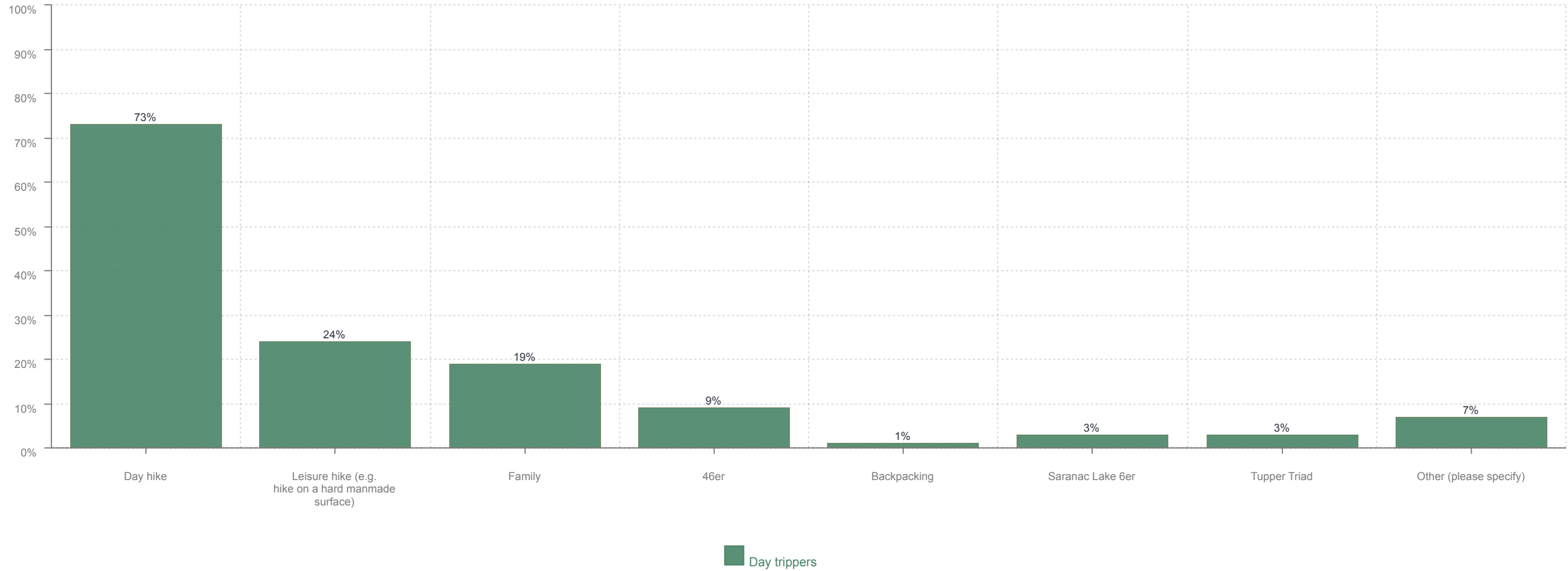
Hiking Breakdown

All travelers



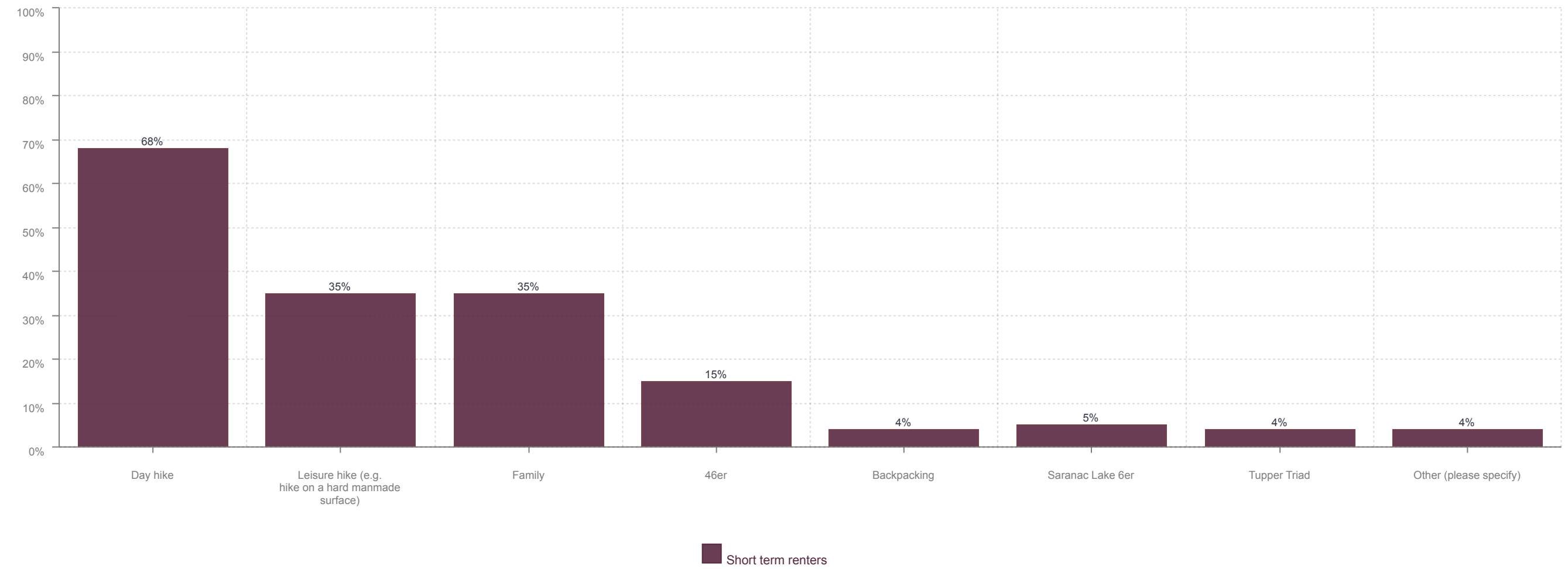
Hiking Breakdown

Day trippers



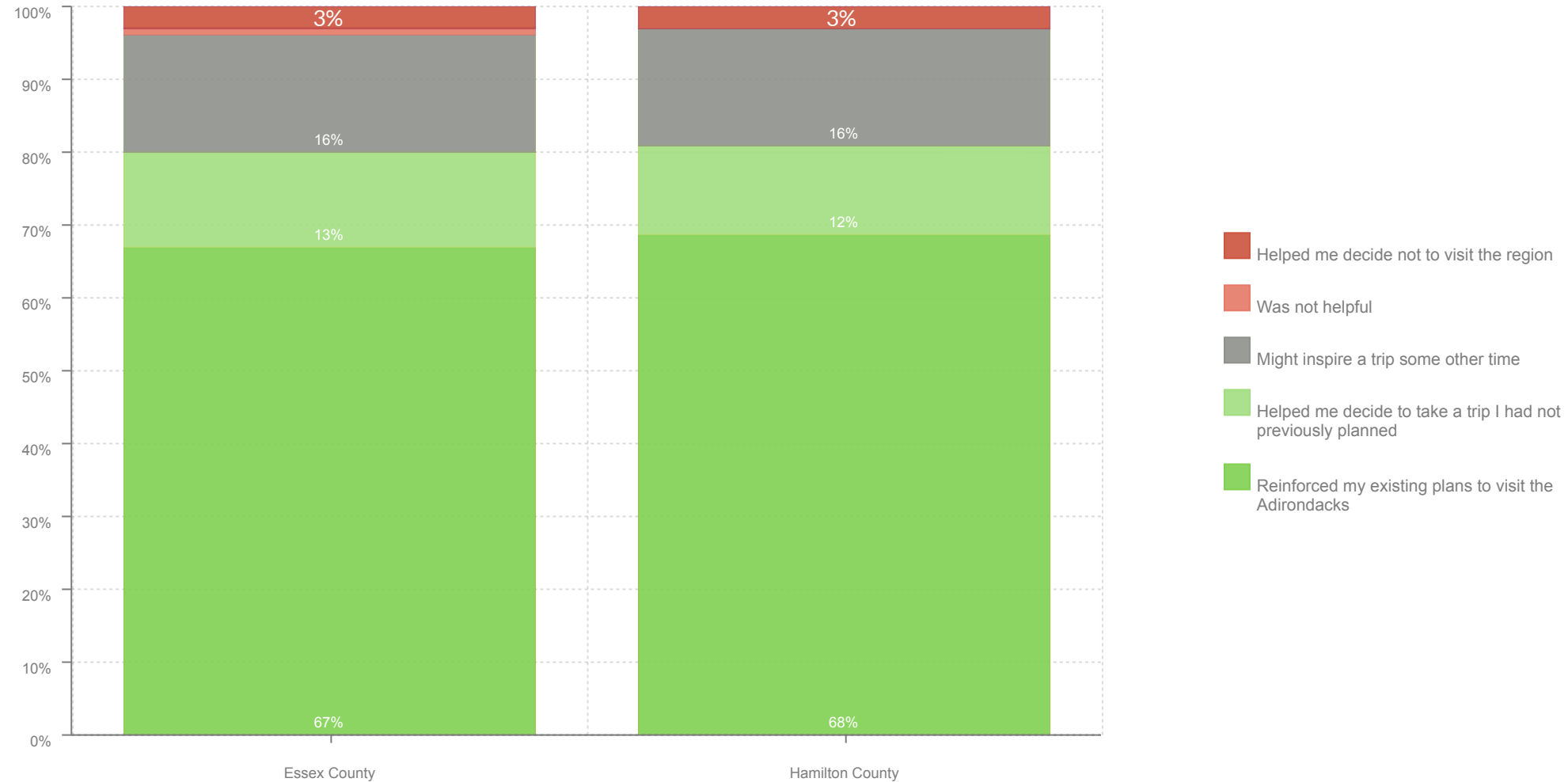
Hiking Breakdown

Short term renters



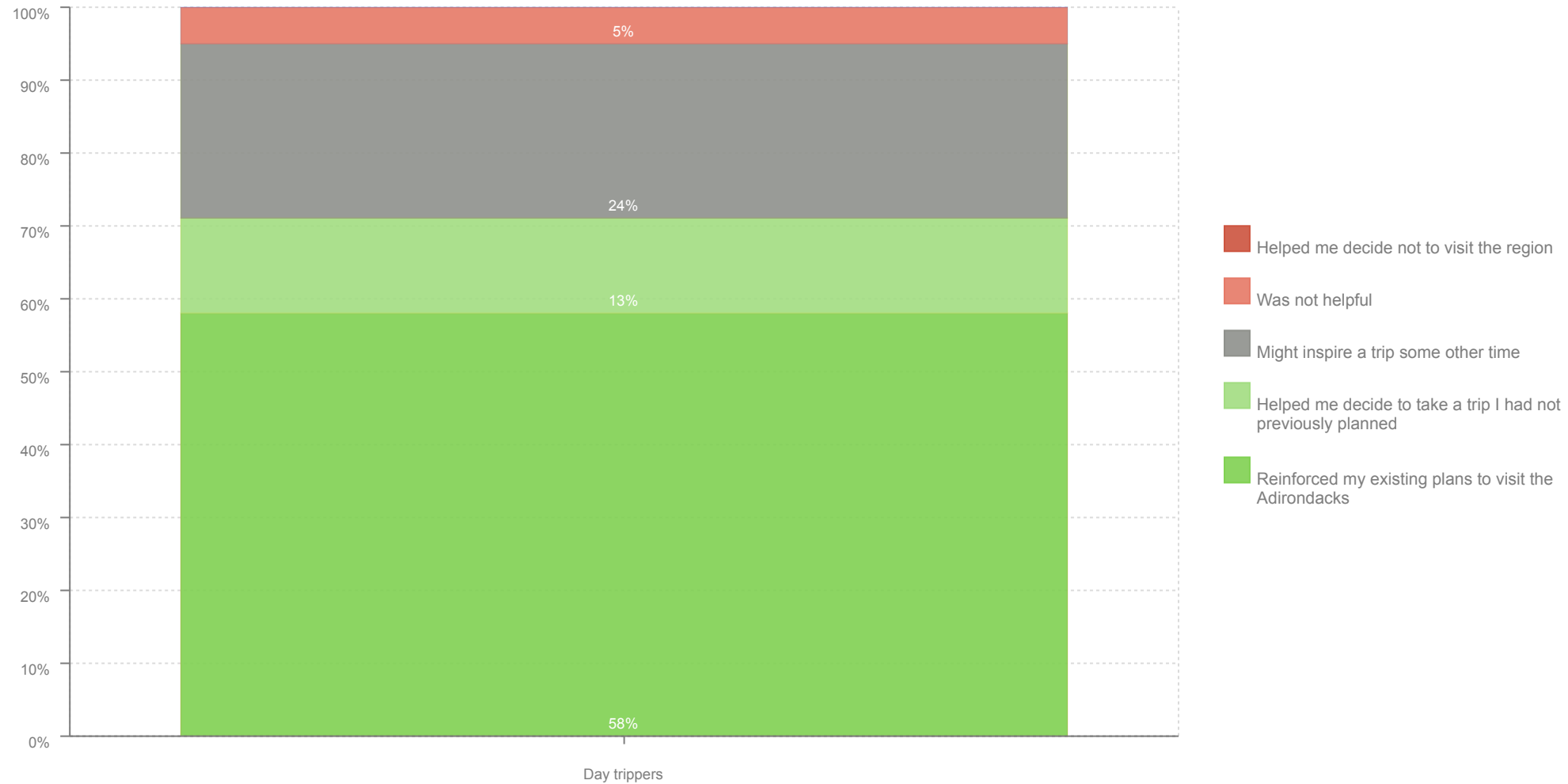
Conversion Rate from Viewing ROOST Marketing Materials

All travelers



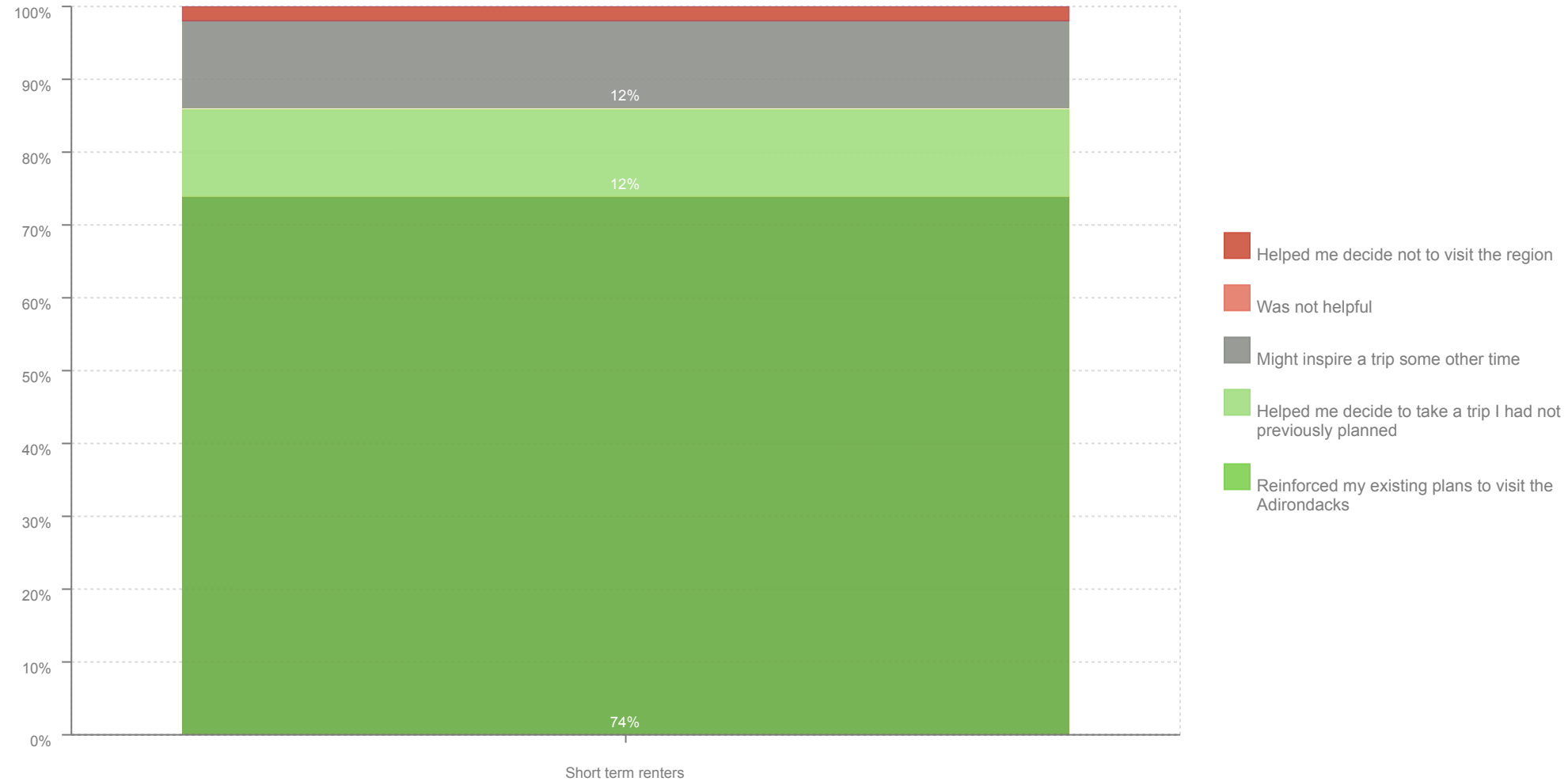
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers



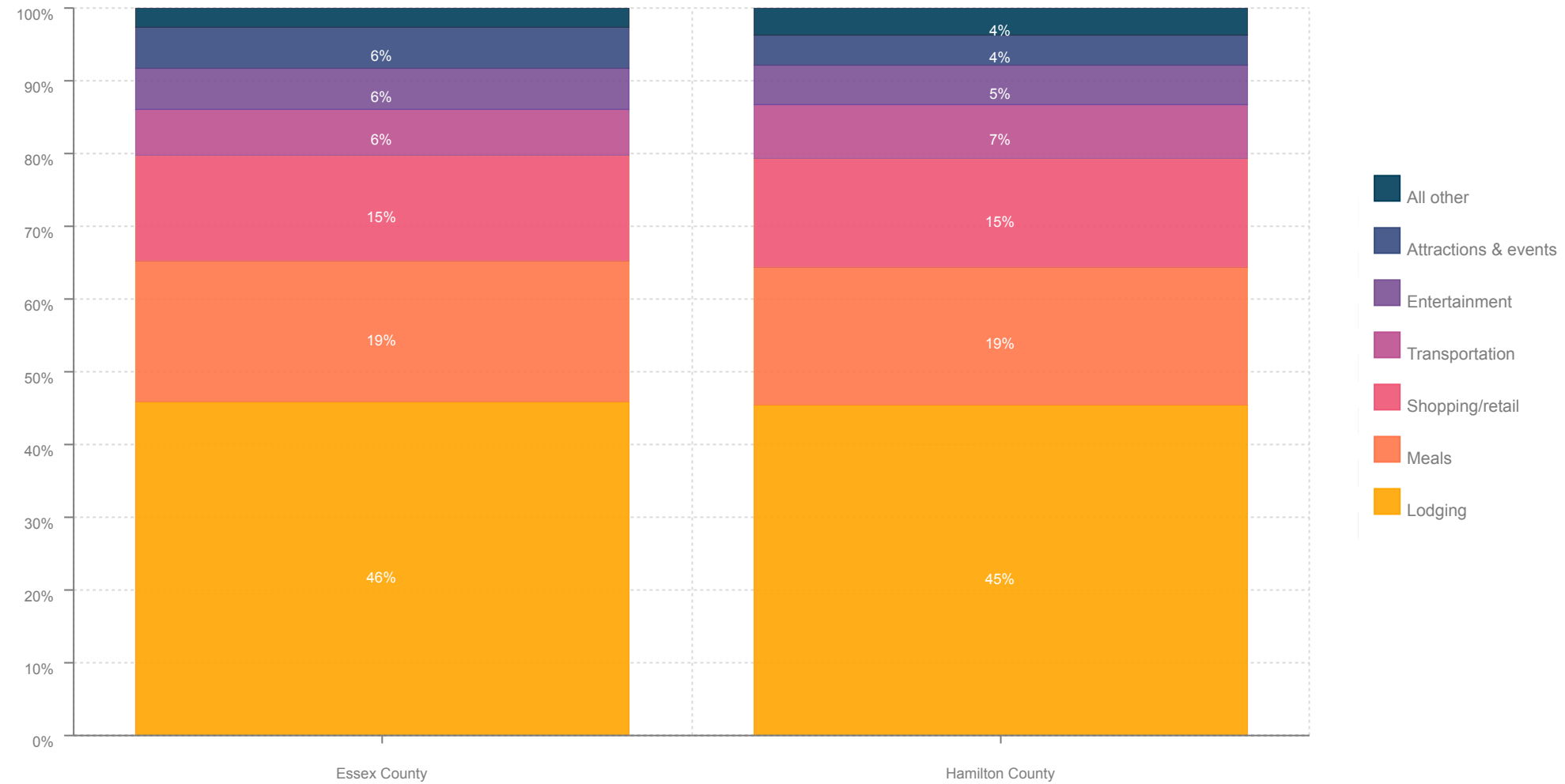
Conversion Rate from Viewing ROOST Marketing Materials

Short term renters



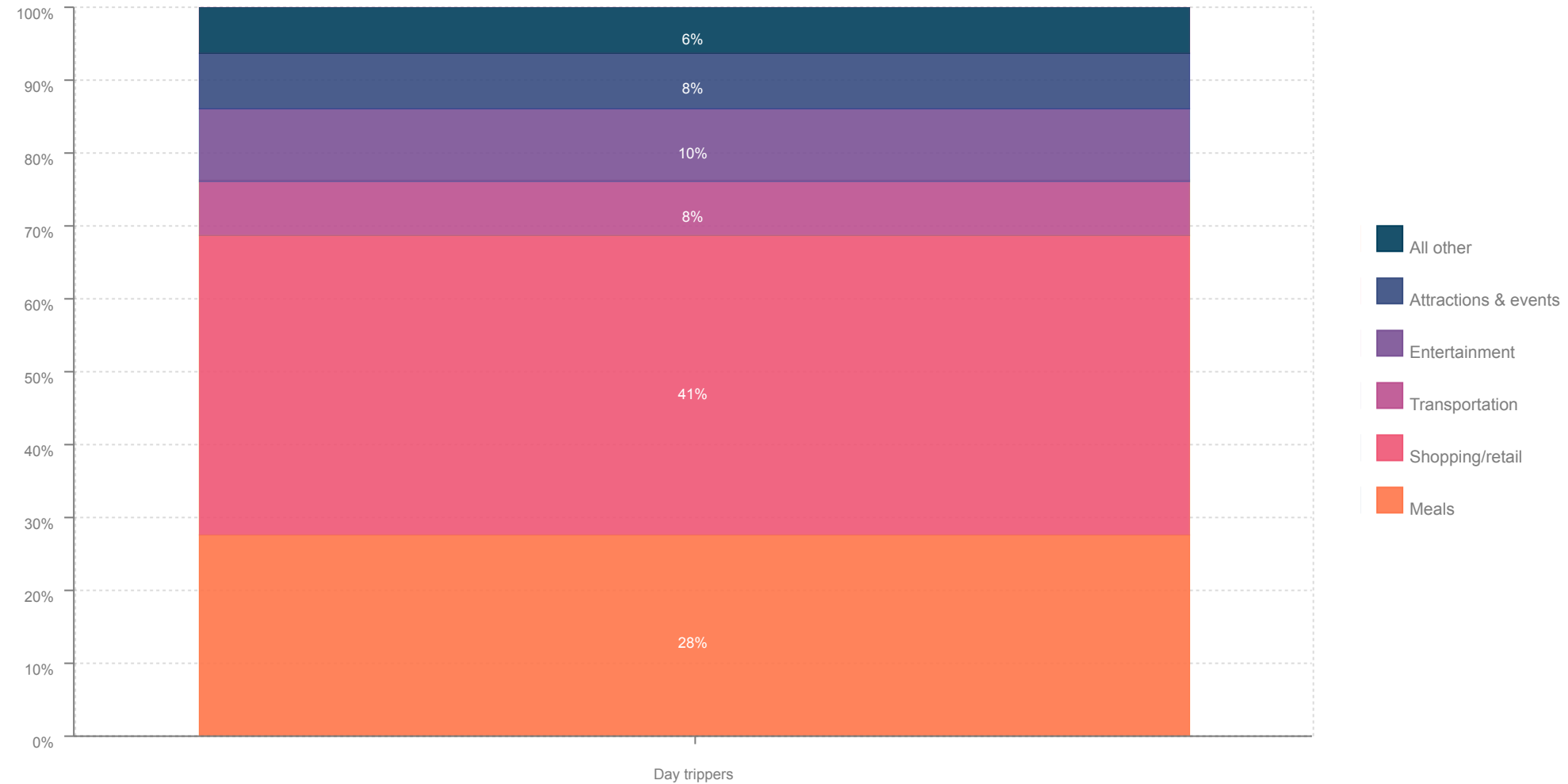
Total Expenditure Allocation by Category

All travelers



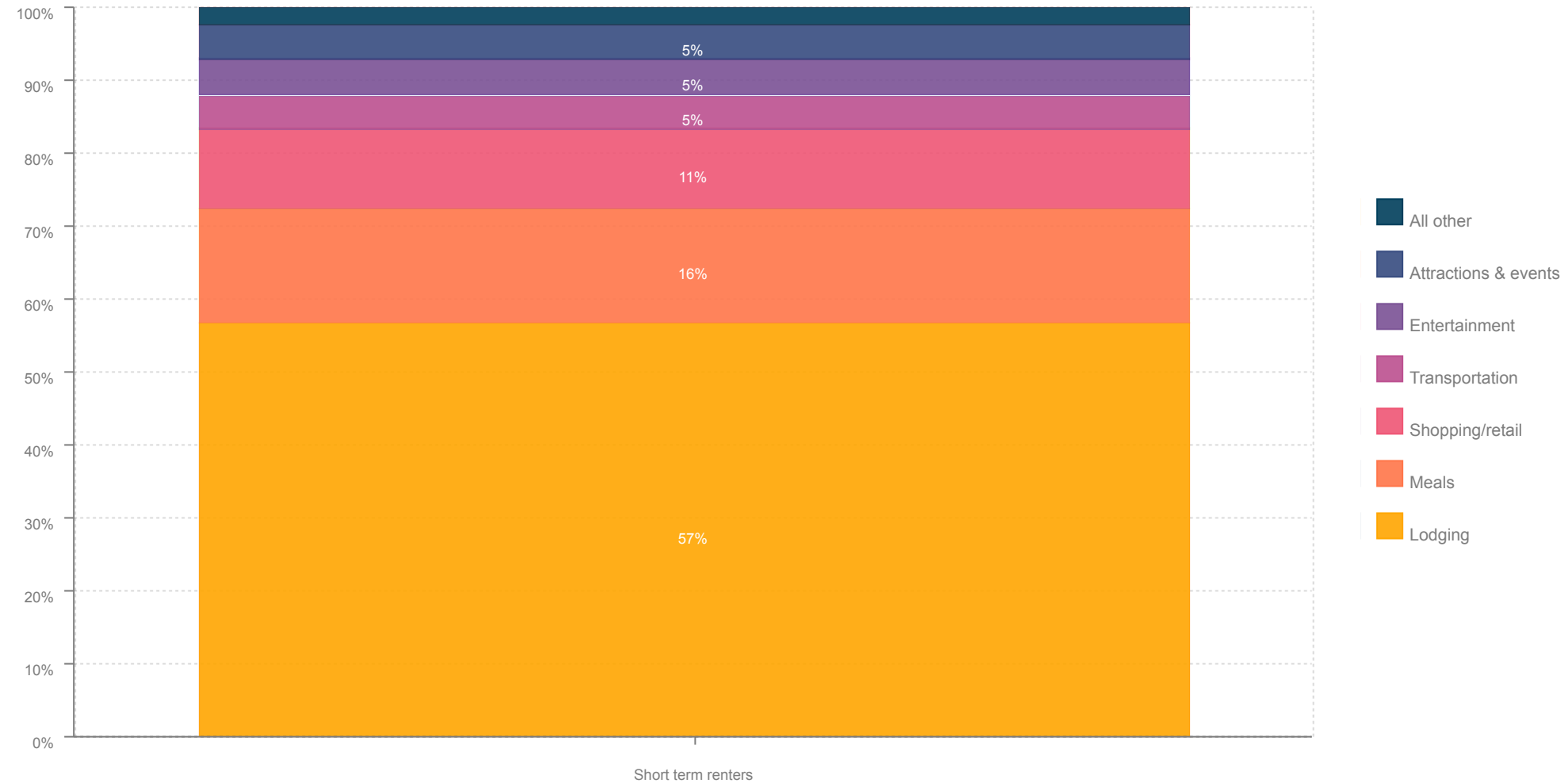
Total Expenditure Allocation by Category

Day trippers



Total Expenditure Allocation by Category

Short term renters



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

Five Year Mean Party Expenditures

Essex County travelers

	Five year average	2021	2020	2019	2018	2017
Lodging	\$601	\$679	\$910	\$499	\$470	\$447
Meals	\$284	\$287	\$449	\$245	\$241	\$198
Shopping/retail	\$190	\$215	\$274	\$200	\$164	\$95
Transportation	\$77	\$95	\$71	\$80	\$68	\$69
Entertainment	\$75	\$83	\$67	\$84	\$80	\$59
Attractions & events	\$71	\$83	\$57	\$84	\$76	\$57
All other	\$39	\$40	\$10	\$68	\$52	\$23
Average daily expenditure	\$384	\$467	\$283	\$417	\$415	\$340
Average total expenditure	\$1,336	\$1,482	\$1,838	\$1,260	\$1,151	\$948

Mean Party Expenditures

Day trippers

	Day trippers
Lodging	
Meals	\$66
Shopping/retail	\$98
Transportation	\$34
Entertainment	\$18
Attractions & events	\$24
All other	\$15
Average daily expenditure	\$255
Average total expenditure	\$255

Mean Party Expenditures

Short term renters

	Short term renters
Lodging	\$318
Meals	\$87
Shopping/retail	\$62
Transportation	\$26
Entertainment	\$28
Attractions & events	\$27
All other	\$13
Average daily expenditure	\$561
Average total expenditure	\$2,693

Essex County Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

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.
- 94% 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 2% Asian.
- Average reported total traveler party size declined from the record high party size of 2020 (4 adults and 1 child) to 2.5 adults and 0.75 child. This is closer to the longer-term average reported party size.
- About 3 out of 4 respondents reported that they were NY State resident visitors, dropping from about 4 out of 5 in 2020.
- Northeastern state visitors outside of NYS rose slightly to 18% of respondents. Out-of-state visitation from those outside the Northeast recovered slightly from the prior year to 7% of the group.

Visitor Profile

All Essex County travelers

- Average duration of stay reported by 2021 travelers dropped substantially from the extreme high of 6.5 years reported by 2020 visitors.
- The average length stay for 2021 visitors is reported at 3.3 nights, slightly below the 5-year average of 3.7.
- Visitation was reported highest in peak fall (September/October- 30%). This was just ahead of the peak summer season (July/August- 26%). January/February (10%) reported visitation fell from the prior year (15%). Reported May/June (9%) and November/December (8%) remained consistent from the year prior.
- Hotels/motels remained the most reported lodging choice among 2021 traveler respondents by a high margin (43%); short-term rentals were reported as the second most common lodging choice used by 16% of respondents. Respondents reported staying with family and friends (15%) in greater numbers than in prior years.

Visitor Profile

All Essex County travelers

- The most reported draw in visiting the region continued to be outdoor activities, with 65% of respondents selecting this attraction to visit.
- “Relaxing, dining and shopping” remained the second-most commonly expressed reason to visit the area, selected by 56% of respondents. Sightseeing (44%) and visiting friends (24%) rounded out the top four areas of expressed interest. Seventeen percent (17%) of respondents reported visiting Olympic sites as an attraction.
- Eighty percent (80%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of primary interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (28%), followed by fishing (18%).

Visitor Profile

All Essex County travelers

- Average daily traveler party spending in 2021 was estimated at \$463 per day. This represents a 38% increase in daily spending from 2020 visitation figures, however much shorter average stays were reported in 2021 from 6.7 to 3.3 nights.
- Total average estimated trip expenditure was \$1,482, a 23% decline in total spending from 2020 reporting visitors. The 2020 year was exceptional because it reflected much higher spending due to abnormally long stays (due substantially to the pandemic and displaced work/vacation schedules). Removing this year as such for comparison, expenditures in all categories reported by 2021 visitors were comparatively high.

Visitor Profile

All Essex County travelers

- Reported spending on lodging showed a near-high of \$679 per average stay
- Average meals (\$287) and shopping (\$215) expenditures also were high in comparison with 5-year averages.
- Approximately 198,000 individuals contacted ROOST via its various outlets for travel information about Essex County in 2021. This represents a healthy 18% increase over inquiries from 2020.

A person wearing a dark puffy jacket, a red scarf, a black beanie, and purple gloves is seen from behind, leaning against the metal railing of an observation tower. They are looking out over a vast, snowy mountain landscape with patches of evergreen trees. The sky is overcast and grey. The tower's metal frame is visible in the foreground and background.

Hamilton County Visitor Profile

ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

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.

Day Tripper Visitor Profile



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

Day trippers

- 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 3.7.
- 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).

Visitor Profile

Day trippers

- 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 (71%) 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.

Visitor Profile

Day trippers

- 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 skiing/snowshoeing and birding at 9%.
- At 59 years, the mean age of daytrip visitors is very slightly older than all visitors age (58).

Short Term Renter Visitor Profile



Roost

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

Visitor Profile

Short term renters

- 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.
- 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 3.4 nights.

Visitor Profile

Short term renters

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

Regional Visitor Impacts



ROOST

REGIONAL OFFICE of SUSTAINABLE TOURISM

adirondacks, usa

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

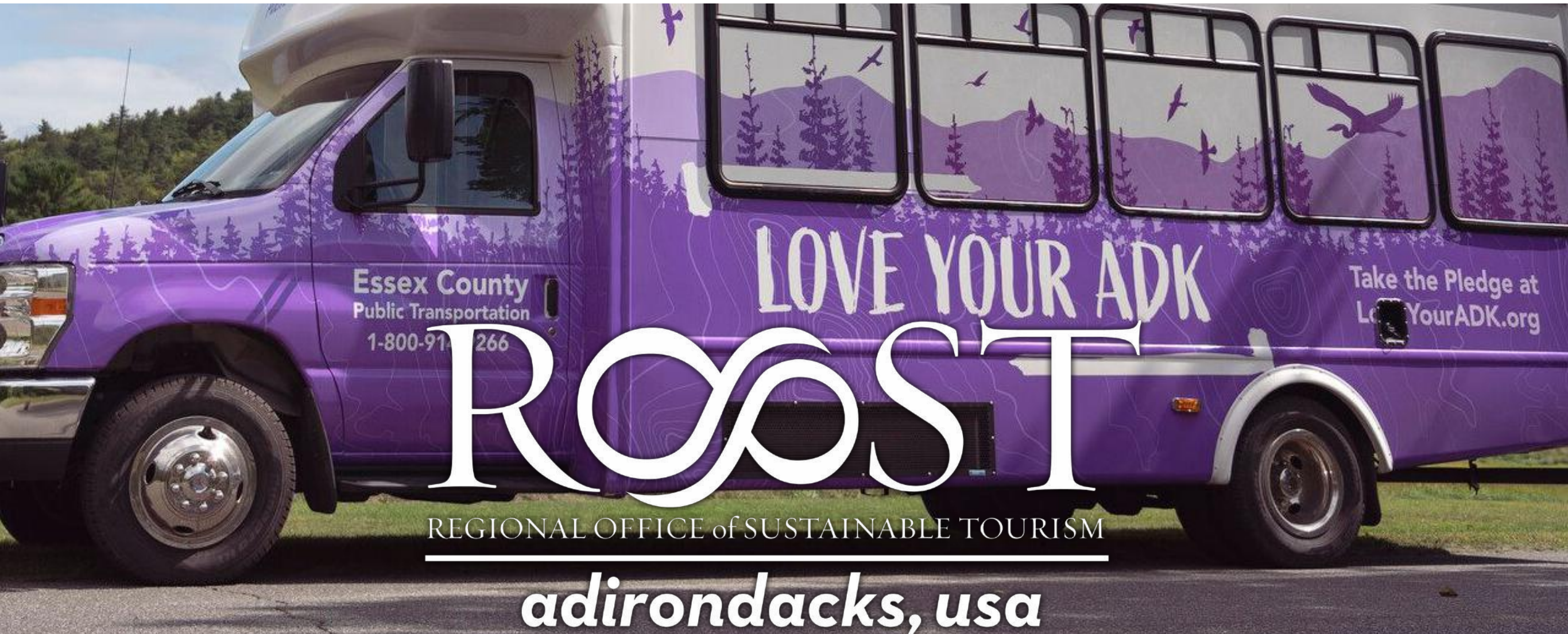
- Seventy-nine percent (79%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (34%), followed by fishing (21%).
- 69% of respondents 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



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:

$$\begin{array}{ll} 211,930 & \text{(number of direct, traceable inquiries)} \\ \times 80\% & \text{(gross conversion factor)} \\ \times \$421 & \text{(mean traveler party expenditure per day)} \\ \times 3.4 & \text{(mean length of stay in nights)} \end{array}$$

- 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