

TRAVEL STUDY

2022 TRAVELER PROFILE

Hamilton County, New York

Regional Office of Sustainable Tourism (ROOST)

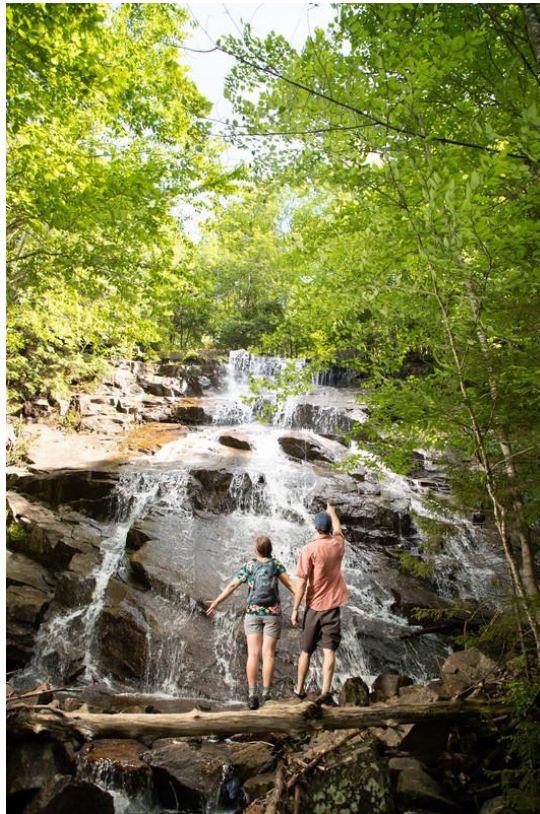


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PlaceMaking
Growing North Country Communities and Economies

April 2023

EXECUTIVE SUMMARY

Introduction

The Regional Office of Sustainable Tourism (ROOST) commissioned, for the seventh 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.

The year saw a return to more normal activities for visitors following two heavily impacted pandemic years. 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 2022 visitors 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. PlaceMaking also conducted similar research for neighboring Hamilton 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 2022 visitation to the region from among all survey respondents included:

Demographics and Visit Information

- Average traveler party age of respondents was 59 years old, consistent with recent years.
- Respondents included 62% female and 38% males.
- Ninety four percent (94.7%) of visitor respondents were of white ethnicity; with 1% Native American and less than 1% each African American/Black and Asian. Two percent of visitors reported mixed race.

- The average reported total traveler party size dropped among reported 2022 visitors, to 2.8 adults and 0.8 child, or 3.6 overall, which is near to the reported party size from prior year.
- Visitation by respondents from within New York state stayed consistent to prior year at 81% of respondents.
- Of New York state visitors, nearly half (49%) reported coming from central or western New York state. Twenty-seven percent (27%) reported coming from the Capital District or North Country. Five percent of respondents reported coming from downstate/NYC.
- Northeastern state visitors from outside of New York stayed consistent from the prior year at 12% respondents. Reported visitation from other U.S. regions than the Northeast was 6%, with 5% of these from the southern U.S. This is a sizeable jump from the 3% reporting travel from outside of the northeastern U.S (and NY) in 2021. Less than 1% of respondents come from Canada.
- Average stay length reported by 2022 travelers climbed just slightly from 3.7 in last year data to 3.8 nights.
- Fall season visitation (September/October) climbed again from prior year to 35% of all 2021 reported visits, now notably higher than peak summer (July/August) visitation at 28%. The rate of early summer visitation (May/June) was consistent with recent years at 20% and reported early winter visitation (November/December) rose for the second year to 8%. January/February visitation dropped from year prior to 6%. March/April visitation fell slightly from the prior year to nearly 5%.
- Camping/RV is the most commonly reported lodging choice among 2022 traveler respondents at 26%, followed by hotels/motels at 22%. Second home use and short-term rentals are equally reported at 16%. Staying with family and friends climbed somewhat to 17% of reported visits in 2022.

Interests

- The most popular reported attraction to visit the region continued to be outdoor activities, with 69% of respondents selecting this draw to visit.

- “Relaxing, dining and shopping” remained the second most common expressed reason to visit the area by 51% of respondents. This area of interest showed a 5% drop from the level reported in the prior year. Sightseeing (45%) and visiting friends (25%) rounded out the top four areas of interest.
- Thirteen percent (13%) reported interest in heritage sites and nine percent (9%) in events, both marked increases in level of interest from prior year. Seven percent (7%) showed an interest in arts and entertainment.
- Seventy-nine percent (79%) 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 (55%), followed by boating (27%). Both canoeing/kayaking and boating levels of interest climbed five percentage points over prior year data.
- Fifteen percent (15%) of respondents expressed an interest in birding; this has grown over the last five years. Fishing was expressed as an outdoor activity of interest in 10% of respondents and 7% each reported interest in cycling and mountain biking.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 79% of respondents indicating interest in day hikes, 35% in leisure and hard surface hiking and 33% in family hikes.

Traveler Spending and Conversion

- The average daily traveler party spending in 2022 increased to \$375 daily from \$314 in 2021. The total estimated average trip expenditure for 2022 visitors is \$1,425. Overall reported expenditures grew by a notable 22% in last year by comparison.
- Reported spending on lodging accounted for much of this daily expenditure growth at \$667 per stay and a record high for this data point.
- All other expenditure categories showed increases in comparison to the prior year, including meals (\$253), shopping (\$210), entertainment (\$72) and attractions (\$55) also showed growth from the 5-year daily spending trend. The stronger than 5-year average expenditures suggest a positive trend.

- 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 83%. This is slightly higher than the last several years of conversion rates, showing a trend of steady increases in this measurement of effectiveness in marketing to the region.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the eleventh year. The study has employed similar methodology with comparable results for 19 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 2022 travelers also included adjacent Essex County. Traveler studies for the two-county region including additionally the Villages of Tupper Lake and Saranac Lake in Franklin County, and for Essex County, are provided under separate covers.

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 2022. Surveys were collected quarterly this year throughout 2022. 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 near to the 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.

Approximately 215,000 invitations were sent by ROOST for the regional survey. Nearly 6,000 responses were received. This results in an approximately 3% response rate. Approximately half of these were from those who visited this portion of the Adirondacks during the 2021 year at least once. This is a lower survey pool than seen in recent years. Overall travel leads were higher and general survey response is increasingly difficult to maintain. While researchers prefer at least a 5% response and as large an actual visitor pool as possible, the results appear to be valid in comparison to many years of data collection and external data review.

The project team for this research is consistent with previous years of study, including project manager Victoria Zinser Duley- AICP, Principal with PlaceMaking and John Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management.

CONCLUSION

ROOST has played a key leading role in promoting tourism and return to broader markets as the world moved out of the pandemic. As began in the prior year, data from 2022 visitors show a return toward more typical visitor patterns. A return to sports tournaments and events provided a boost to visitor numbers and dollars spent. Domestic travel across the U.S. saw a return to pre-pandemic levels (2019) by the end of 2022².

Most 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 the recent year and a half of inflation. This is a strong point for significant regional economic impact.

The higher number of visitors in this study are reporting from areas outside of New York and northeast U.S. in 2022, compared with year prior, is an interesting finding. The longer stays and larger visitor parties reported during the height of the pandemic have returned to more typical 3-to-4-day averages and visitor party sizes of 3 to 4 persons.

Camping remains a strong proportion of Hamilton County visitors at just over one in four reporting parties. Short-term rentals and staying with family and friends are also a good proportion of reported stays. For a second year, visitors who reported traveling in peak fall exceeded those who reported visiting in peak summer. This shift to an extremely strong fall visitation is notable. Visitation in the shoulder seasons to summer and fall have stayed fairly consistent, although reported winter travel fell somewhat.

Most expenditure categories reported all-time highs from this data collection. Reported lodging expenditures made a dramatic (27%) increase from the prior year. Daily expenditure levels have been on a steady growth trend even before the recent year and a half of inflation. This is a strong position for continued regional economic impact.

Another positive indication in this research is the steady improvement of measured conversion rates, or extent to which respondents note that travel information received impacted their visit decisions. This has increased notably from 76% of respondents (who replied that travel information received positively impacted their travel plans) to 83% in 2022.

The U.S. Travel Association predicts domestic travel to stay strong in 2023 and a slow continued improvement of business travel. Sluggish recovery of international travel is predicted as well, which to some extent impacts anticipated Canadian visitors to the region. Statista reports the travel market expanding substantially due to greater ease of mobility and improved awareness of destinations due to widely accessible information³. Preferences include higher levels of hygiene and contactless services, as well as sustainable practices.

The research team continues to discuss the broader impact of regional tourism on Hamilton County visitor assets and areas by which to expand traveler data collection accordingly. The higher levels of daily spending and returning visitor patterns from pre-pandemic times are a strong point to continue to grow the regional economy. These data can continue to be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency.

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**

| | 5 Year Average | 2022 | 2021 | 2020 | 2019 | 2018 |
|--|---------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Number of Completed Survey Responses | 1,154 | 724 | 1,859 | 915 | 942 | 1,333 |
| Average Income of Respondents | \$88,000 | \$90,000 | \$90,000 | \$90,000 | \$90,000 | \$80,000 |
| Mean Age of Respondents | 58 | 59 | 59 | 55 | 57 | 58 |
| Respondent Gender | 59% Female 13% Male | 62% Female 38% Male | 61% Female 39% Male | 59% Female 40% Male | 54% Female 46% Male | 59% Female 41% Male |
| Average Night Stays/ Party | 4 Nights | 3.8 Nights | 3.7 Nights | 7 Nights | 3.2 Nights | 3 Nights |
| Average Party Size | 4 Persons | 3.6 Persons | 3.8 Persons | 5.2 Persons | 3.4 Persons | 3.9 Persons |
| Conversion Factor Rate | 79% | 83% | 80% | 81% | 77% | 76% |
| Average Daily Expenditure per Party | \$295 | \$375 | \$314 | \$167 | \$306 | \$312 |
| Average Total Expenditure per Party per Trip | \$1,130 | \$1,425 | \$1,162 | \$1,167 | \$963 | \$934 |

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex County NY". 2022.
2. U.S. Travel Association. "Travel- Forecasts" ustravel.org 11/29/22
3. Statista.com. "Domestic Travel Summary"