



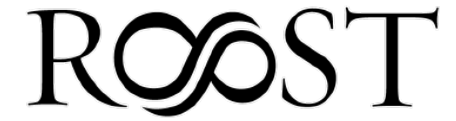
Leisure Travel Study

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

2022 HAMILTON COUNTY VISITOR FOCUS

ROOST

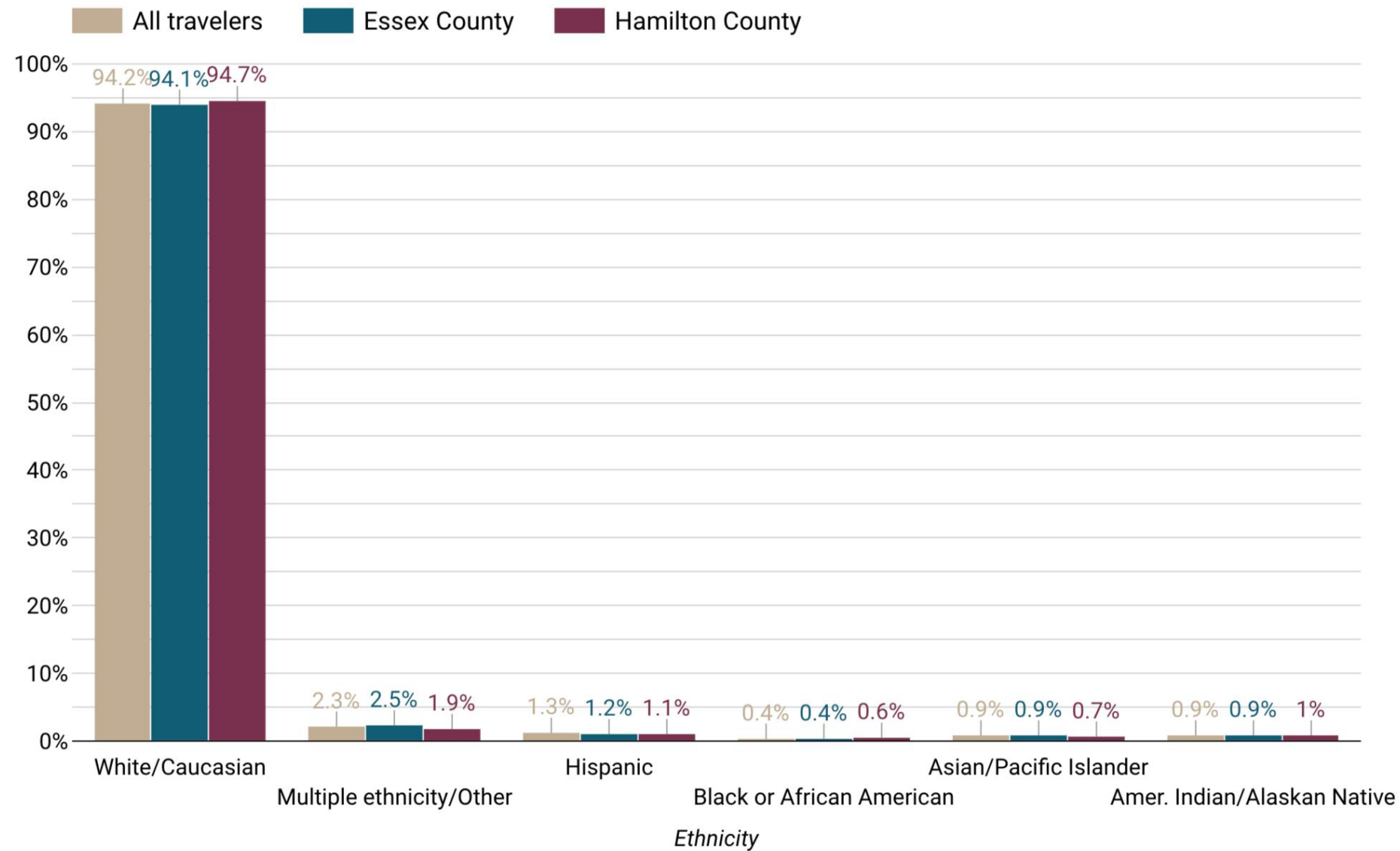
Project background and methodology



- ROOST commissioned a study with PlaceMaking, a regional community and economic development research firm, to determine visitor information at the county levels and to gauge key regional marketing program statistics.
- ROOST sent a jointly created survey tool to a sample of its 2022 leisure travelers to the region. 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.
- Results from 2022 visitation saw a return to more normal activities for visitors following two heavily impacted pandemic years.
- The end product of this research includes detailed visitor information, estimated traveler expenditures and analysis, and an estimated return on investment (ROI) for the region's marketing expenditures. ROOST measured a total of 215,944 traceable leads who were interested in visiting the region in 2022. PlaceMaking also compiled similar research for Essex and Hamilton counties individually, which are available under separate covers.
- ROOST also commissioned a separate study that ascertained visitor opinions and perceptions about sustainability relative to travel decisions, which is available under a separate cover.

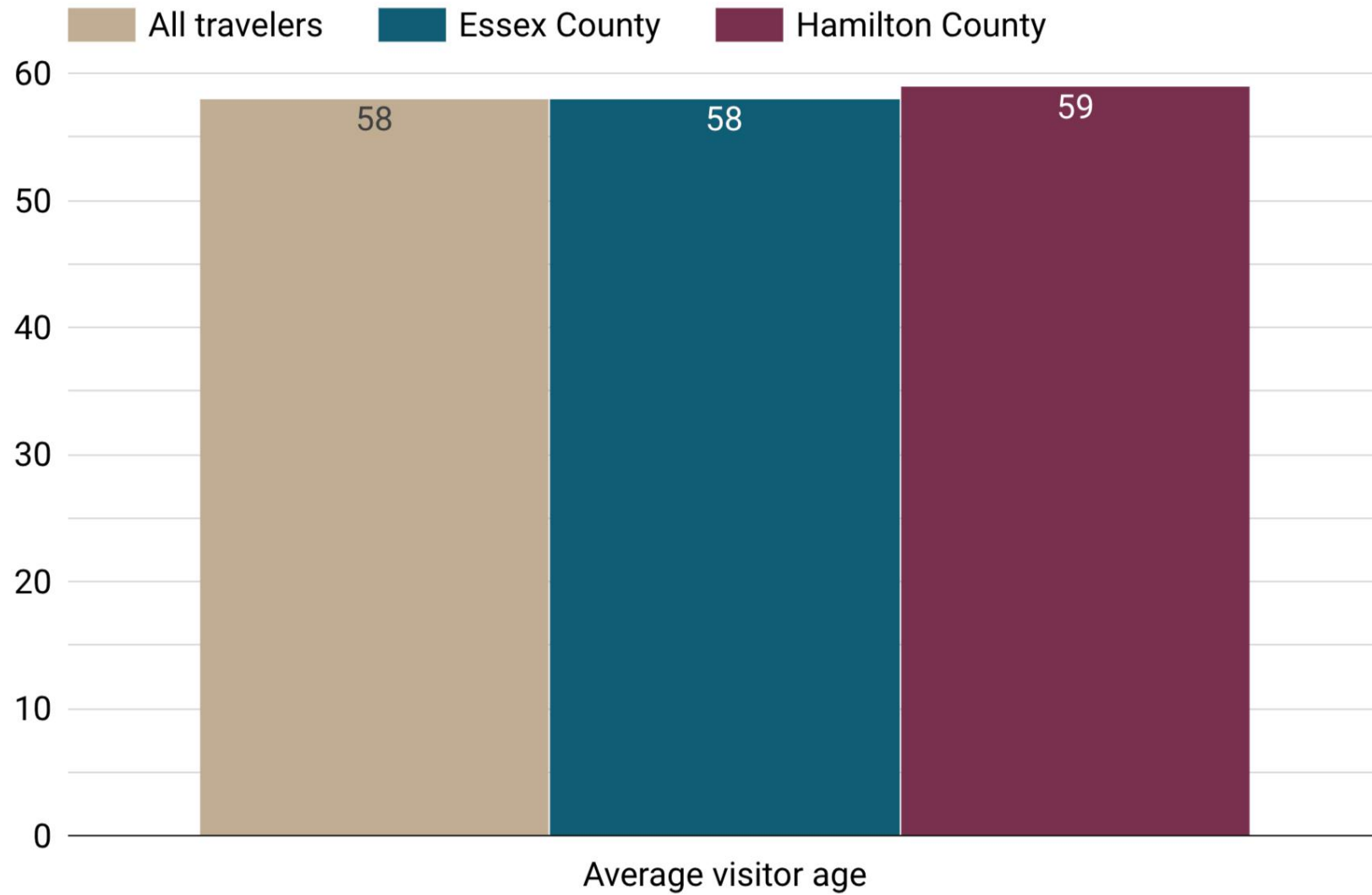
Ethnicity

All travelers



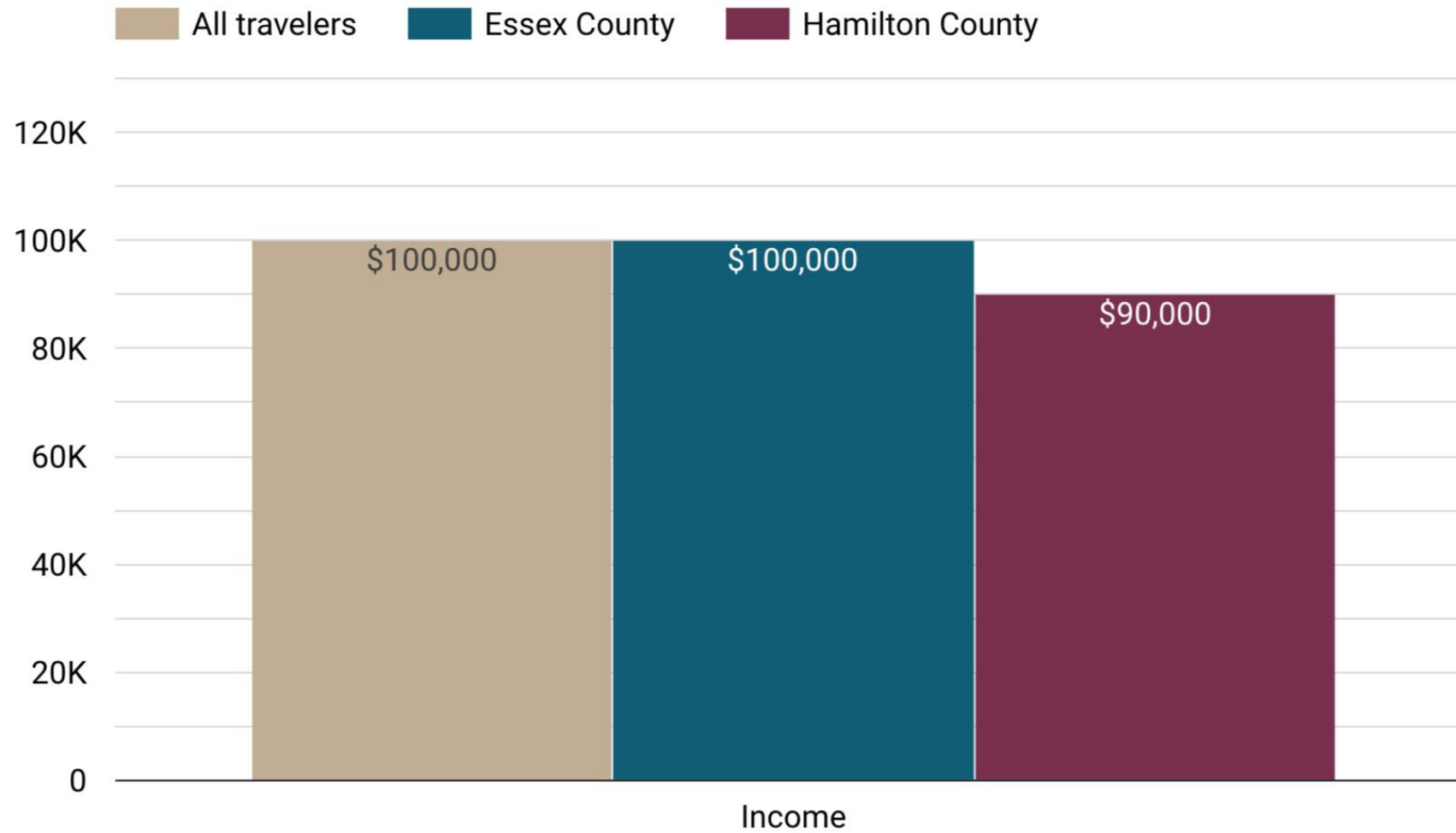
Average age

All travelers



Average income

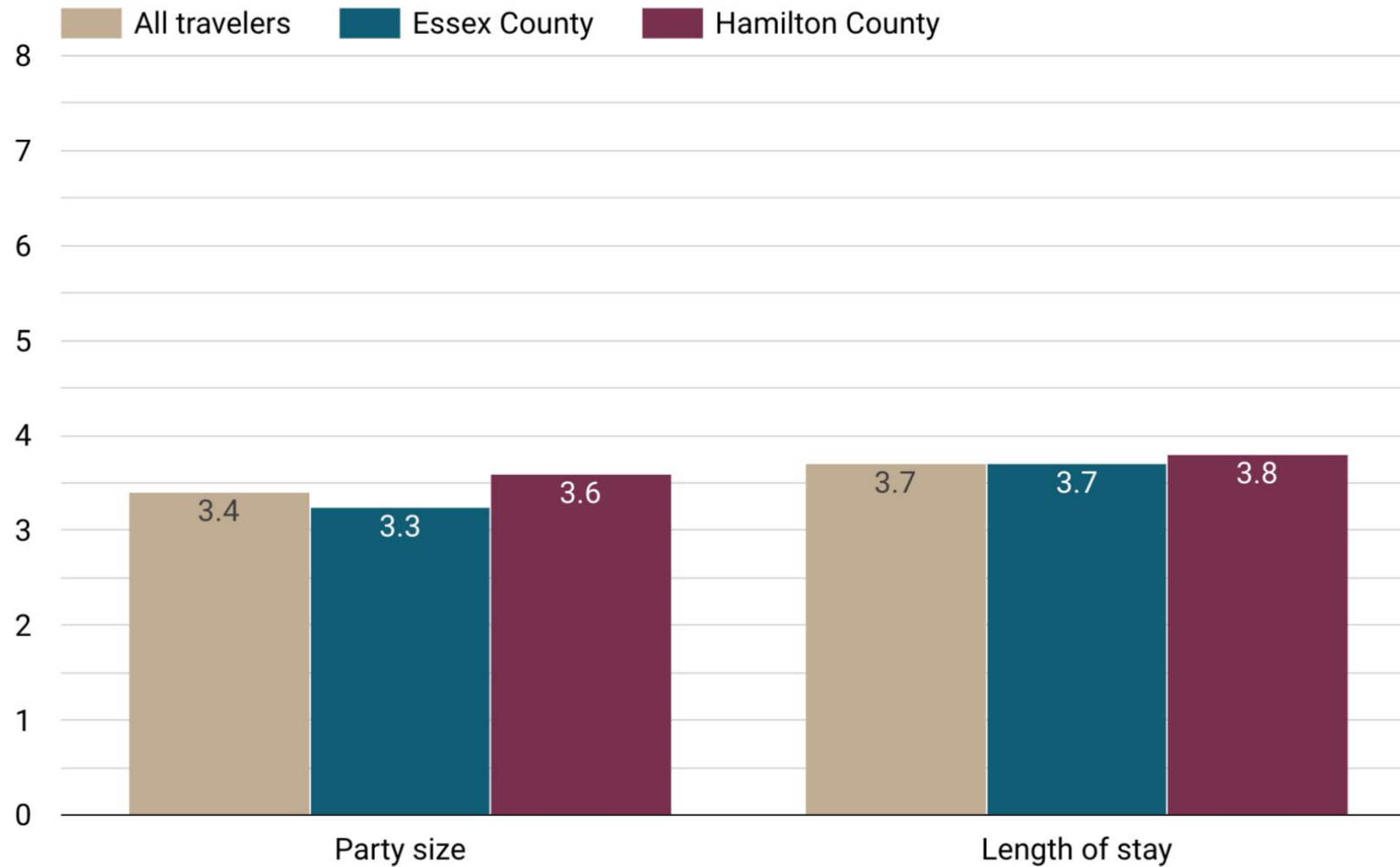
All travelers



Party size / Length of stay

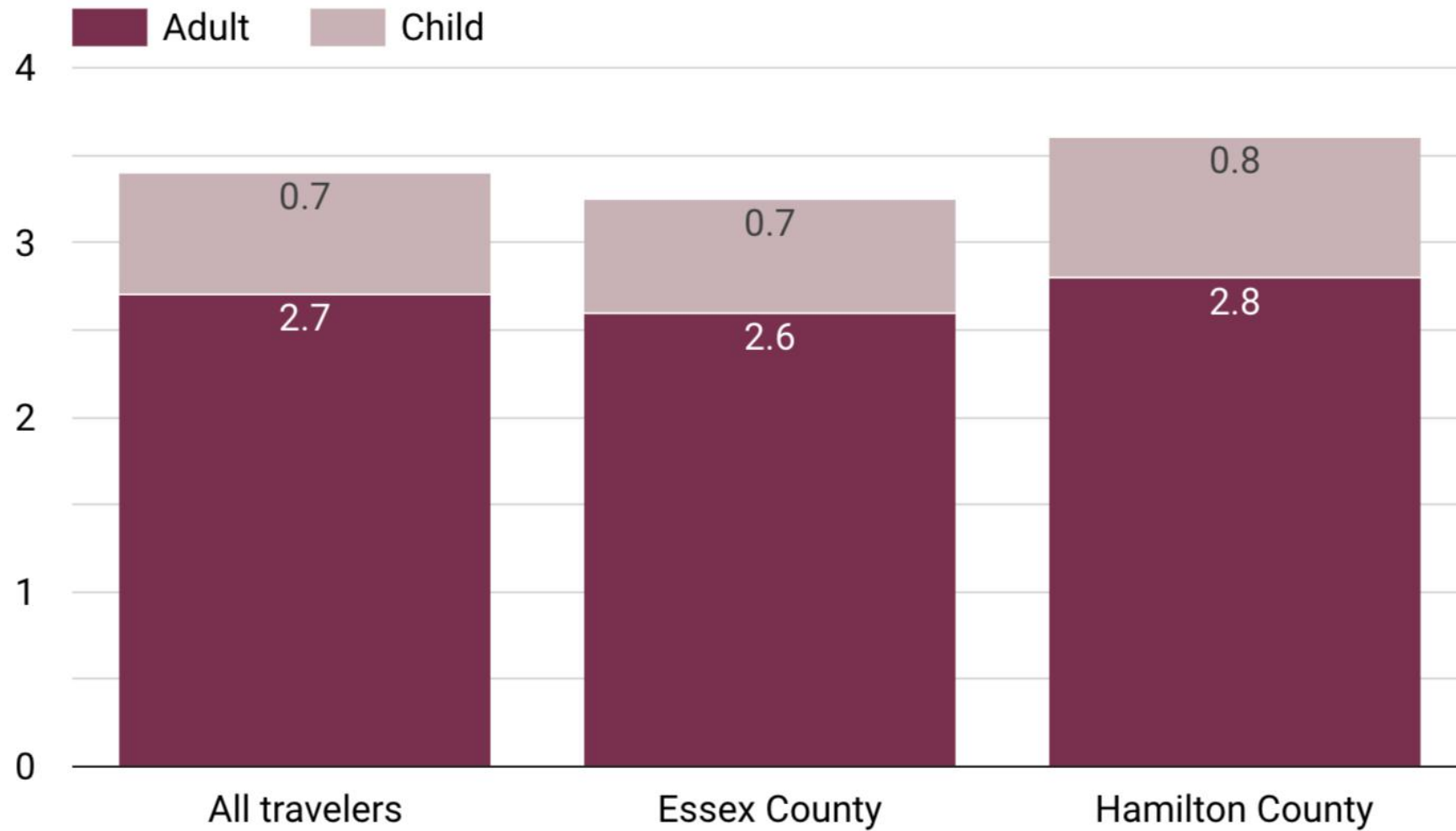
All travelers

ROOST



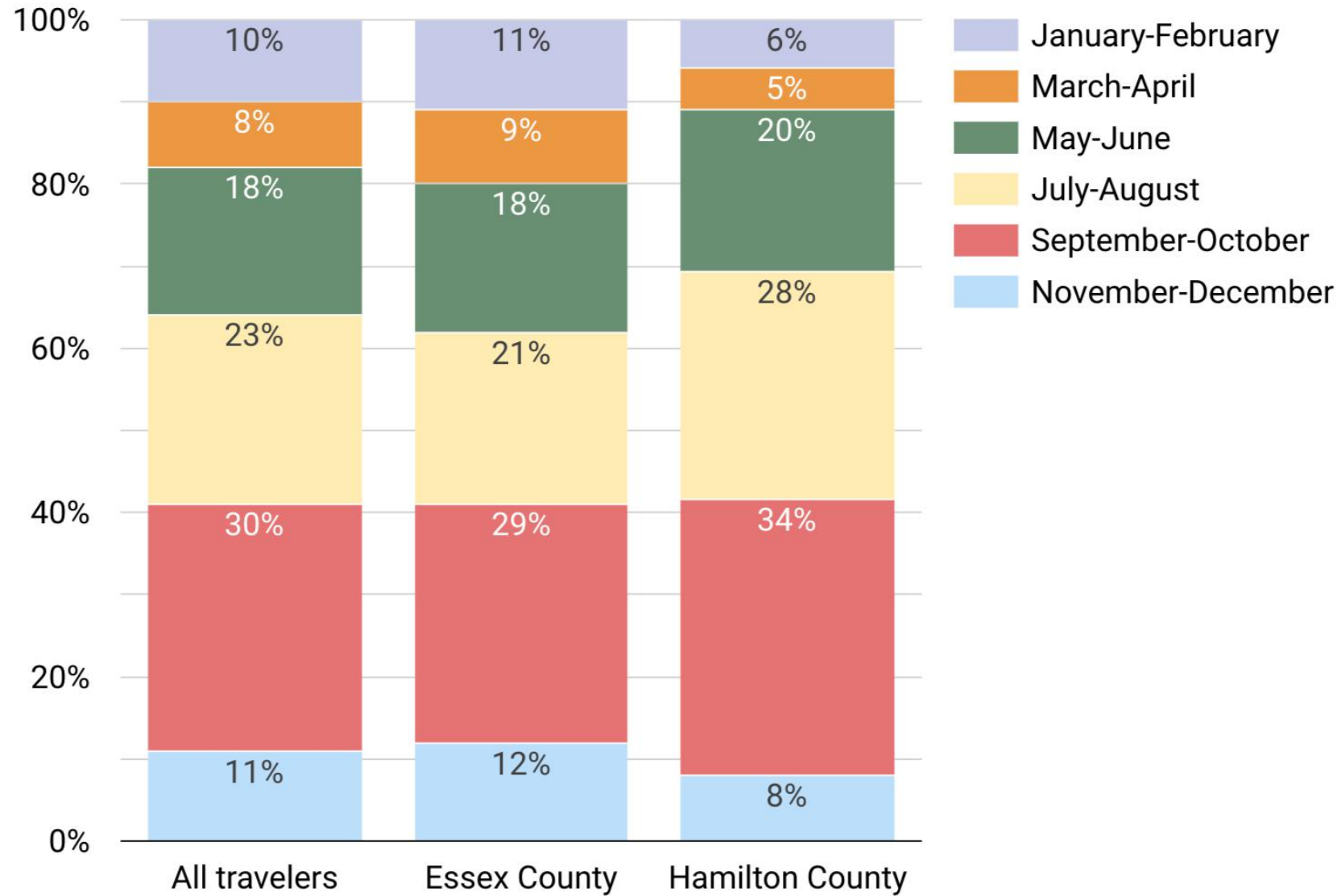
Party composition

All travelers



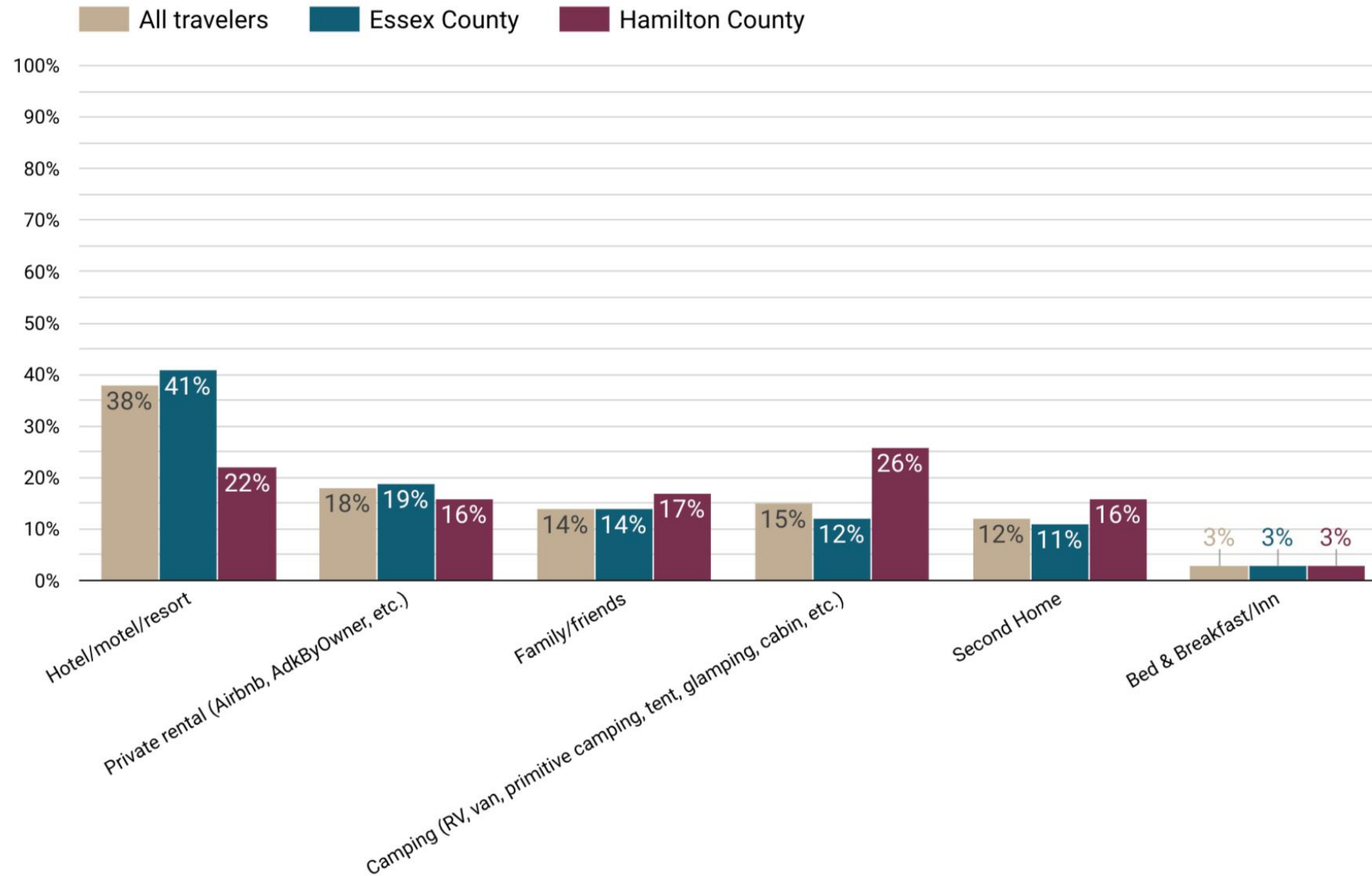
Time of year visited

All travelers



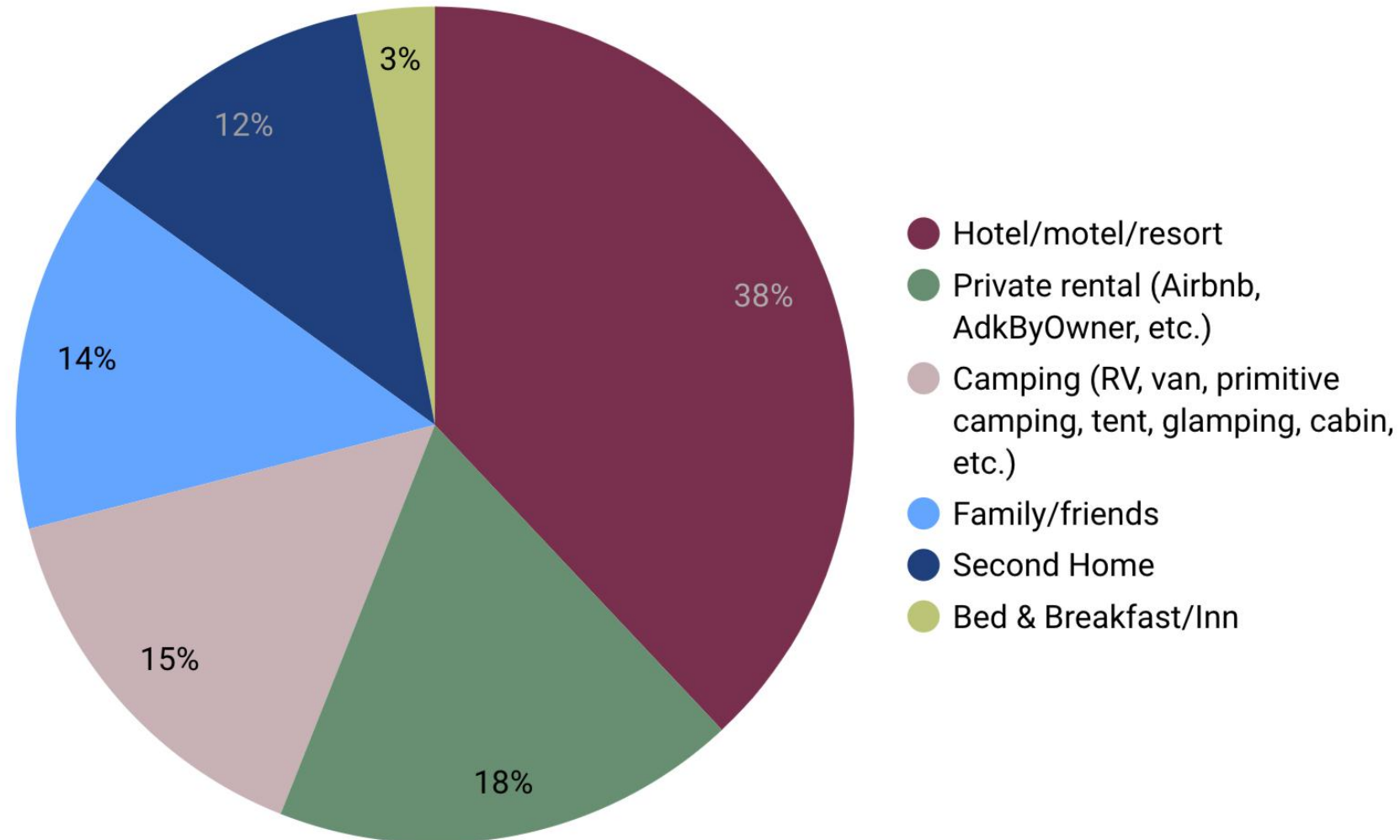
Lodging accommodations

All travelers



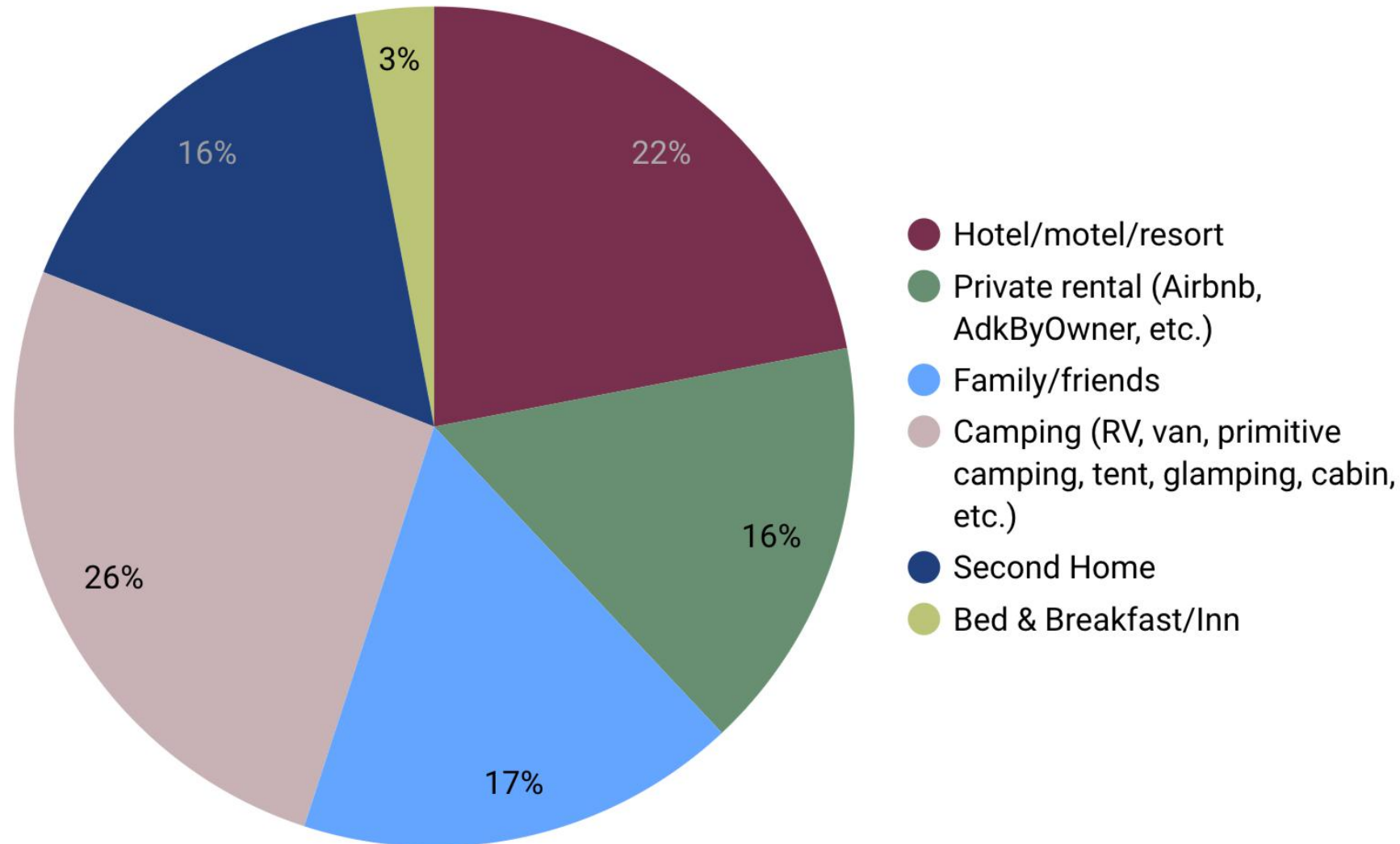
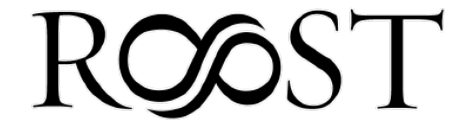
Lodging accommodations

All travelers



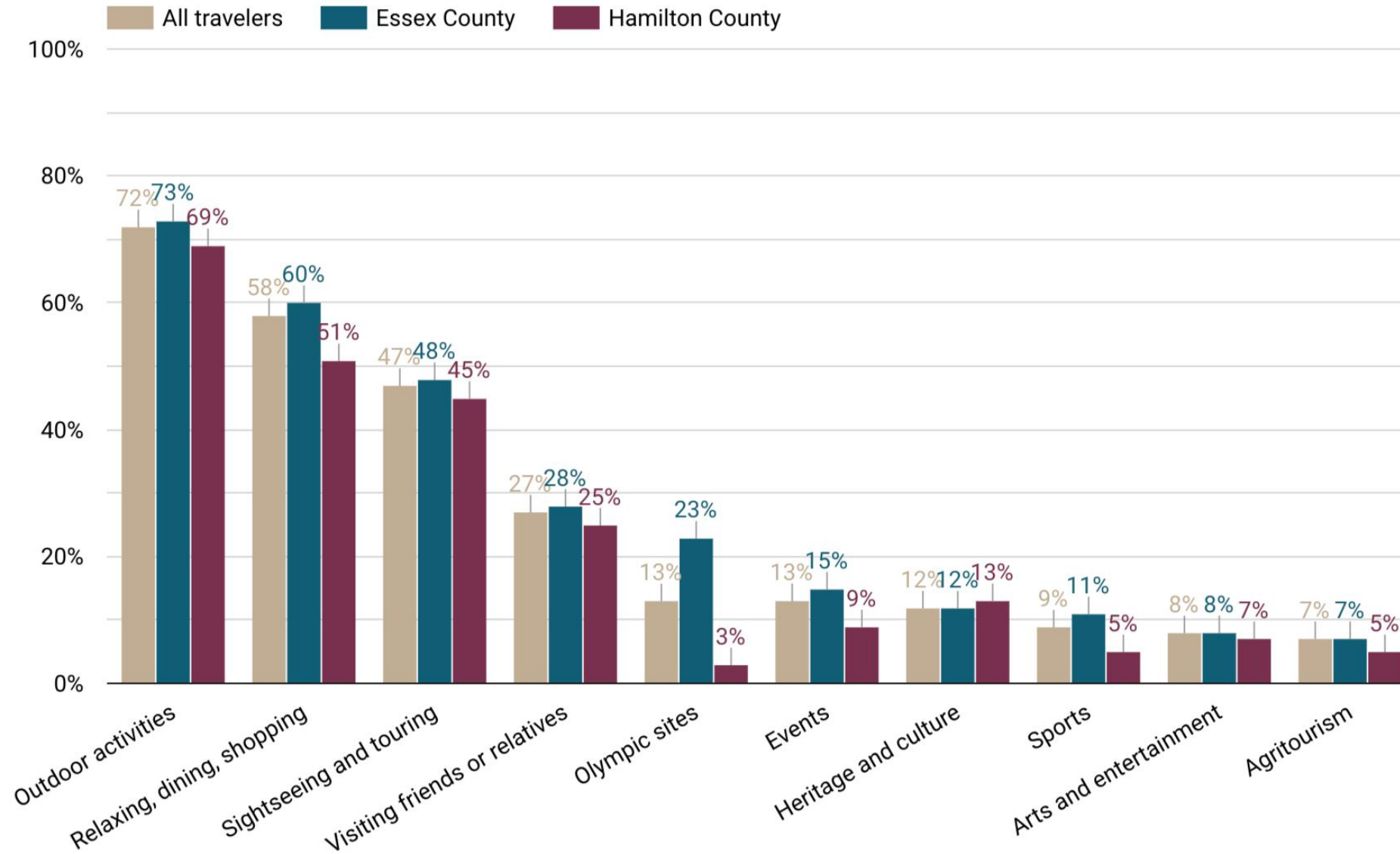
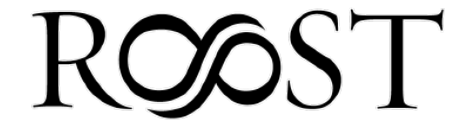
Lodging accommodations

Hamilton County travelers



Key attractions

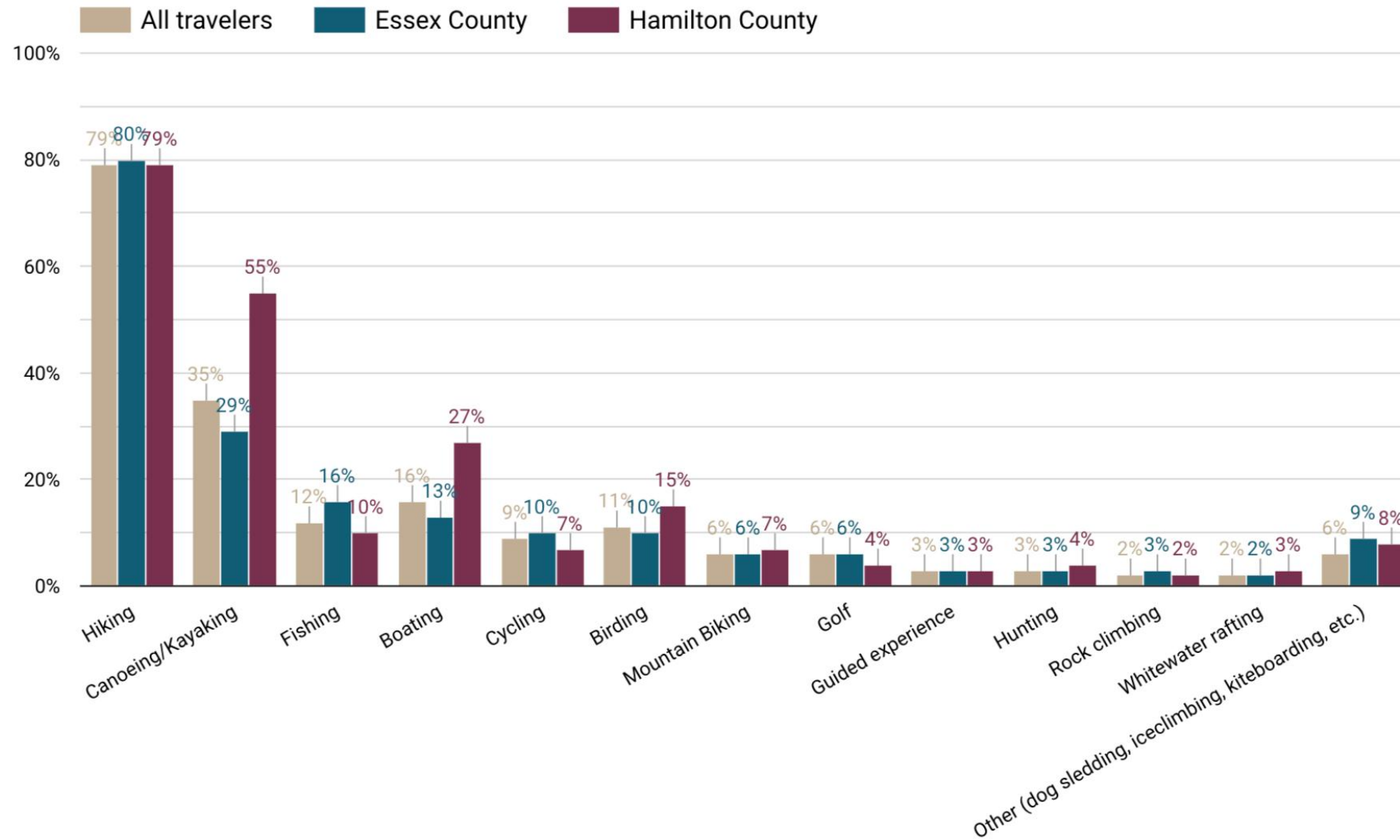
All travelers



Outdoor Spring / Summer activities

All travelers

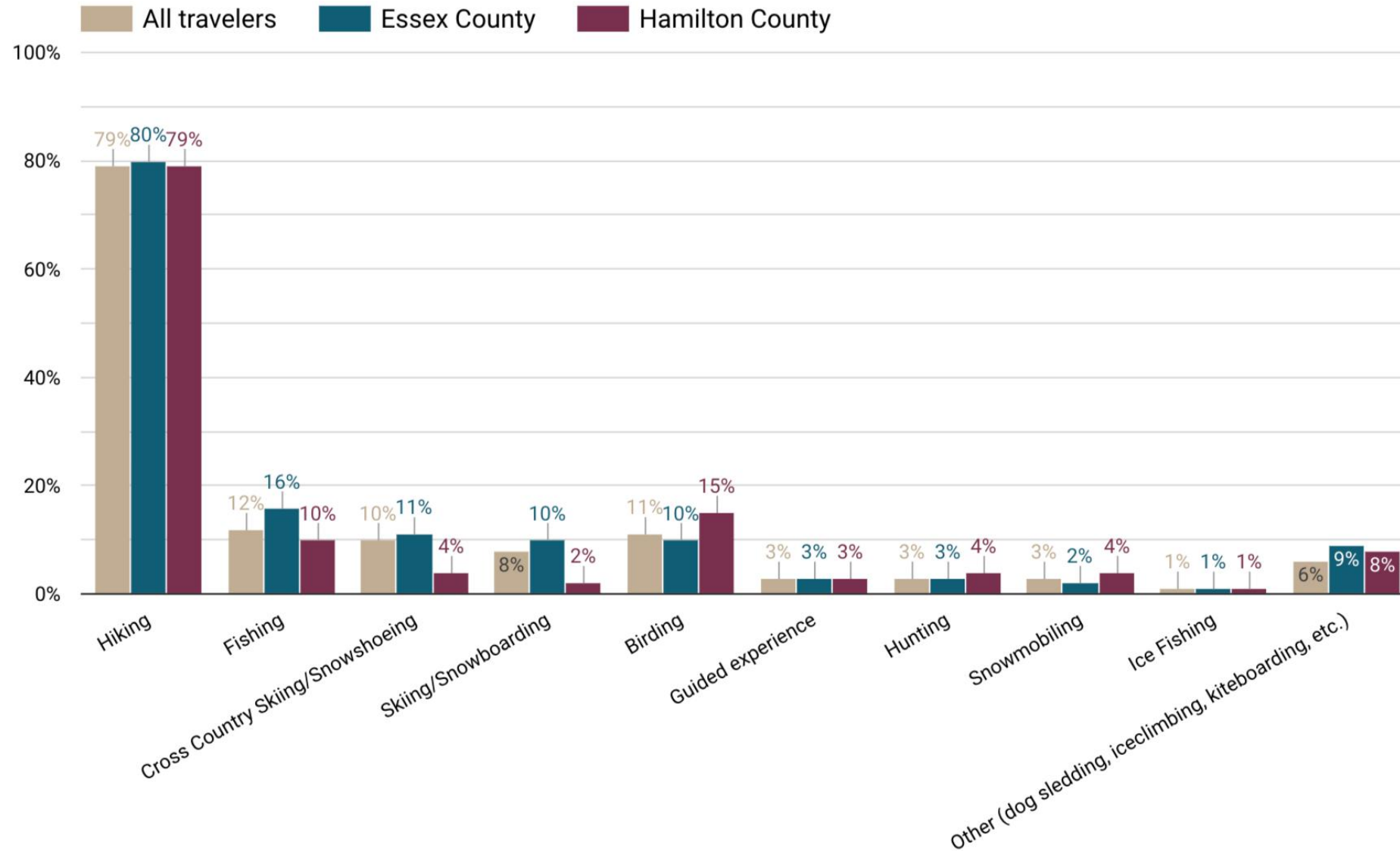
ROOST



Outdoor Fall / Winter activities

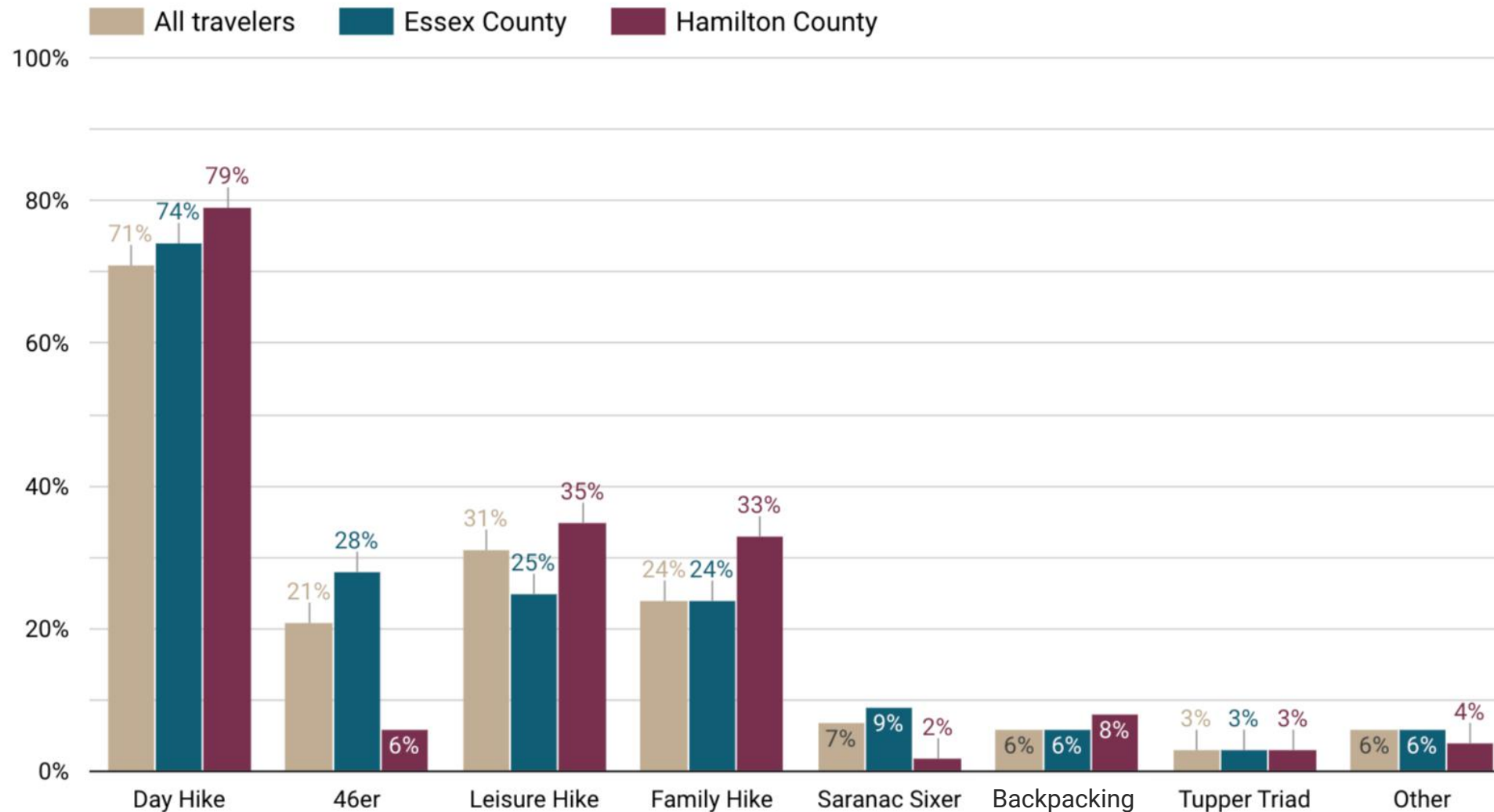
All travelers

ROOST



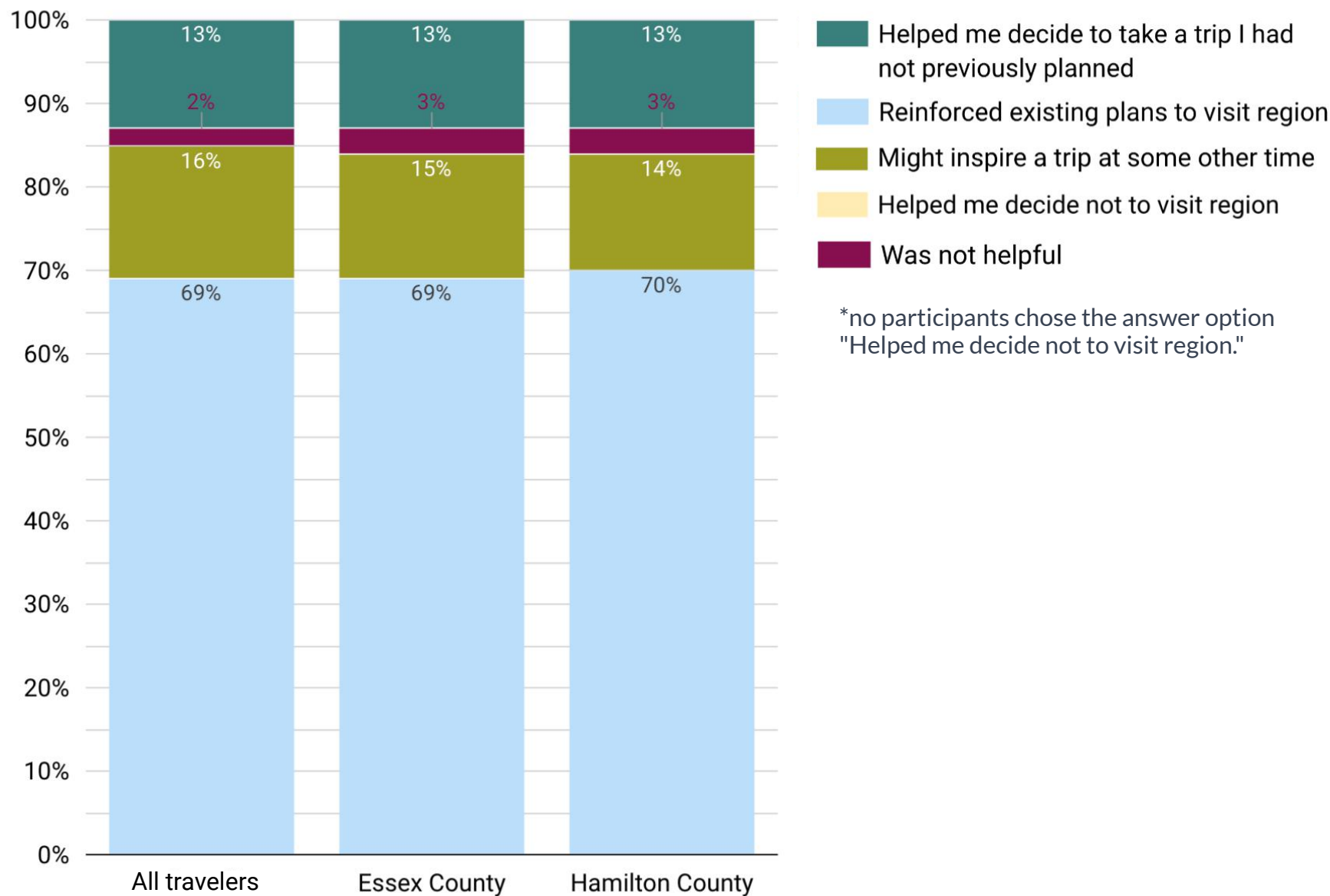
Hiking breakdown

All travelers



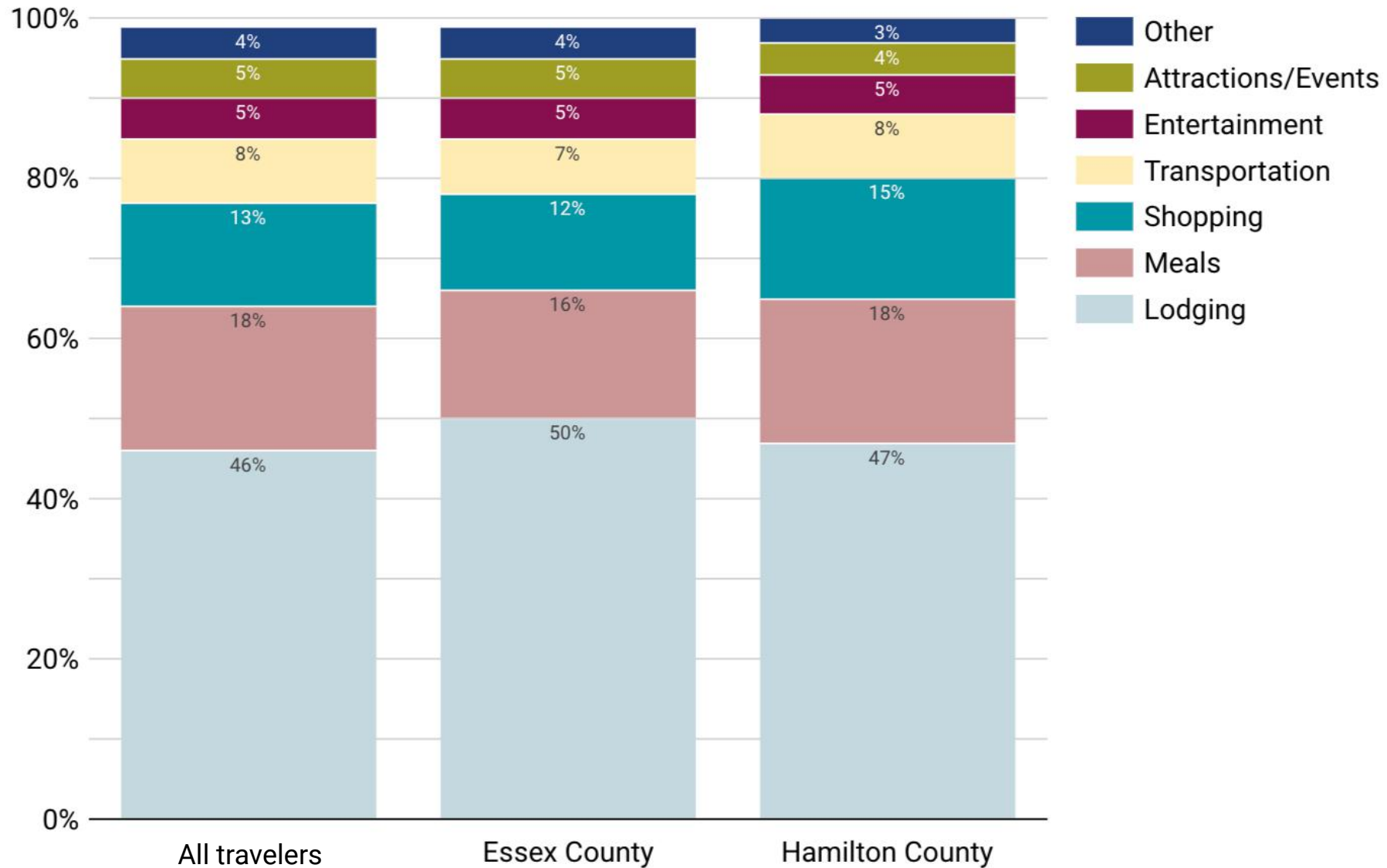
Conversion Rate from Viewing ROOST Marketing Materials

All travelers



Total expenditure allocation by category

All travelers



Mean party expenditures

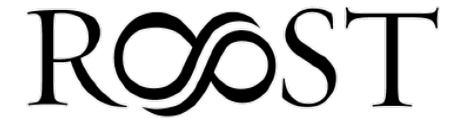
All travelers



	All travelers	Essex County	Hamilton County
Lodging	\$787	\$950	\$667
Meals	\$298	\$311	\$253
Shopping	\$218	\$220	\$210
Entertainment	\$89	\$94	\$72
Attractions/Events	\$90	\$100	\$55
Transportation	\$140	\$140	\$120
Other	\$75	\$80	\$48
Average daily expenditure	\$459	\$512	\$375
Average total expenditure	\$1,697	\$1,895	\$1,425

Visitor profile

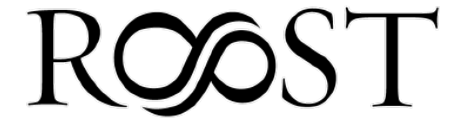
All Hamilton County travelers



- 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.

Visitor profile

All Hamilton County travelers



- 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.

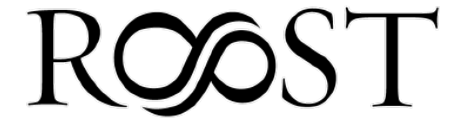
Regional Visitor Impacts

ROOST



Regional visitor impacts

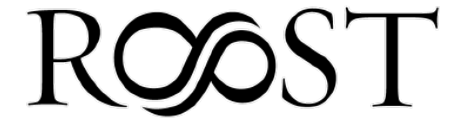
All travelers



- Average traveler party age of respondents was 58 years old, slightly older than the five-year average.
- The average reported total traveler party size was 2.7 adults and 0.7 child, for a total of 3.47 persons. This represents two years of smaller average party sizes from these data.
- Ninety-four percent (94%) of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Asian and Hispanic. Less than 1% of respondent reported African American/Black and 2% reported mixed race.
- Reported visitation by respondents from New York state fell to 69% from 2022, marking two years of decline since a notable high of 80% during the height of the pandemic in 2020.
- Visitors traveling from northern New York and central/western New York comprised the largest group of these respondents at 33% each.
- Northeastern state visitors outside of New York state were consistent from the year prior at 18% of respondents. Visitors reporting from states outside the Northeast rose slightly to 8%. Five percent of these visitors traveled from the southern U.S.

Regional visitor impacts

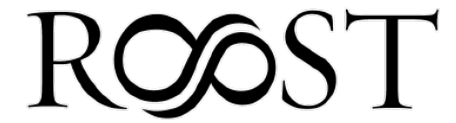
All travelers



- Canadian visitation rebounded somewhat with a reported 2% of visitors from Quebec and 2% from Ontario.
- Stay length reported by 2022 travelers increased slightly from that reported in 2021 to 3.7 nights. This is closer to the five-year average duration of stay (4 nights).
- For the second consecutive year, reported fall visitation in September/October (29%) exceeded reported summer visitation in July/August (23%). May/June (16%), January/February (10%) and March/April (8%) stayed fairly consistent from prior years. Reported November/December visitation climbed from 8% to 11% among 2022 visitors (compared to year prior). The shift in stronger fall visitation is a point which researchers are continuing to note and focus on for future investigation.
- Hotels/motels remained the most frequently reported lodging choice among 2022 traveler respondents (38%), but still decreased from five-year averages as other market share has grown.
- Reported stays in short-term rentals increased to 18% (from 16% in 2021). Other lodging types stayed consistent with recent years with 14% reporting staying with family/friends, 15% in camping/RVs. Visitors reported staying in second homes slightly less from 2021, with 12% indicating this lodging choice.

Regional visitor impacts

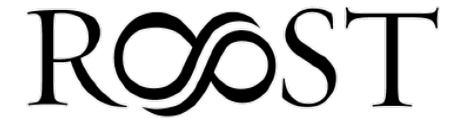
All travelers



- The highest ranking attraction to visit the region continued to be outdoor activities, with 62% of respondents selecting this draw to visit.
- "Relaxing, dining and shopping" remained another frequently expressed reason to visit the area by 58% of respondents. Sightseeing (47%) and visiting friends (27%) rounded out the top four areas of interest. Thirteen percent (13%) of respondents reported visiting Olympic sites and events as an attraction. Reported interest in heritage attractions rose slightly from prior year to 12%.
- 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 (35%), followed by boating (16%).
- Fishing was expressed as an outdoor activity of interest by 13% of respondents. Eleven percent (11%) of respondents indicated interest in birding and ten percent (10%) indicated interest in cross-country skiing/snowshoeing.
- A question regarding hiking preferences continues to indicate a strong preference in casual hiking, with 71% of respondents indicating interest in day hikes, 31% leisure and hard surface hiking and 24% family hikes. Forty-sixer level hike interest raised in 2022, to 21% of respondents.

Regional visitor impacts

All travelers



- Increased expenditure levels were reported by 2022 visitors in comparison to the 2021 year. The average daily traveler party spending in 2022 was estimated at \$459. This is a new high level among recent years of data collection.
- The total estimated reported trip expenditure was \$1,697. Visitor spending has increased for the past five years, including an even larger spike during 2020 due to longer stays.
- Reported spending on lodging (\$787) represents a remarkable 23% increase in this spending from the year prior. Reported meal spending also climbed 7% from the year prior to \$298. These data are supported by the increases in revenue substantiated by ancillary research.
- All other expenditures categories demonstrated increases as well, resulting in strong expenditure profiles. This includes shopping (\$218), entertainment (\$89), transportation (\$140) and attraction/events (\$90).
- Over 215,000 individuals contacted ROOST via its various outlets for travel information about the region in 2022. This is a near record level and a 2% increase from the prior year.

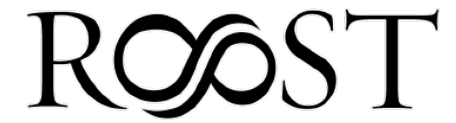
Regional ROI Study

ROOST



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:

$$\begin{array}{ll} 215,944 & \text{(direct leads)} \\ \times 82\% & \text{(gross conversion factor)} \\ \times \$459 & \text{(mean traveler party expenditure per day)} \\ \times 3.7 & \text{(mean length of stay in nights)} \end{array}$$

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2022 is **\$300,724,910.**

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:

$$\begin{array}{l} \$300,724,910 \text{ (total estimated traveler revenue)} \\ \div \$3,188,710 \text{ (total ROOST marketing expenditures)} \end{array}$$

This produces a conservatively-estimated ROI of 94:1 in leisure traveler-related revenue for every marketing dollar expended.