

TRAVEL STUDY

2023 TRAVELER PROFILE

Hamilton County, New York

Regional Office of Sustainable Tourism (ROOST)



PlaceMaking
Growing North Country Communities and Economies

April 2024

EXECUTIVE SUMMARY

Introduction

The Regional Office of Sustainable Tourism (ROOST) commissioned, for the eighth 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 continued to show more normal visitor patterns following 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 2023 visitors to Hamilton County. Visitors were requested to complete an online survey (via 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. PlaceMaking also conducted similar research for neighboring Essex County and for the cumulative Hamilton and Essex County region. A regional summary/ROI analysis is provided under separate cover.

Survey Respondent Data Summary

Highlights of 2023 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 59% female and 41% males.
- The average reported total traveler party size dropped for the second year among 2023 visitor respondents, to 2.7 adults and 0.8 children, or 3.5 overall.
- Visitation by respondents from within New York state stayed consistent with the last several years at 81% of respondents.

- Of New York state visitors, almost half (45%) reported coming from central or western New York state. Thirty percent (30%) reported coming from the Capital District or North Country. Six percent of respondents reported coming from downstate/NYC.
- Northeastern state visitors from outside of New York rose slightly from the prior year (12%) to 14% of respondents. Reported visitation from other U.S. regions than the Northeast was 5%, with 3% of these from the southern U.S. Less than 1% of respondents come from Canada.
- Average stay length reported by 2023 travelers is 3.7 which is lower than the five-year average of 4.2.
- Fall season visitation (September/October) remained notably high in this year's data analysis.
- Camping/RV continued to be the most commonly reported lodging choice among 2023 traveler respondents at 25%, followed by hotels/motels at 21%. Both of these most commonly selected lodging options dropped 1% from the year prior. Second home use and short-term rentals are equally reported at 17%, climbing slightly in proportion during the last two years. Staying with family and friends stayed consistent at 17% of reported visits in 2023.

Interests

- The most popular reported attraction to visit the region continued to be outdoor activities, with 66% of respondents selecting this response. This is a slightly lower figure than expressed by 2022 respondents (which was 69%).
- "Relaxing, dining and shopping" remained the second most expressed reason to visit the area by 51% of respondents. Sightseeing (43%) and visiting friends (27%) rounded out the top four areas of interest consistent with past data.
- Twelve percent (12%) reported interest in heritage sites and 10% in events, both marked increases in levels of interest from the prior year. Eight percent (8%) showed an interest in arts and entertainment.
- More than three out of four (78%) 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 (46%), followed by fishing (28%) and boating (20%).

- Reported interest in fishing grew measurably in this year's data in comparison to the prior year (12%). Reported interest in cross-country skiing/snowshoeing grew from 4% in the prior year to 8% this year.
- Fourteen percent (14%) of respondents expressed an interest in birding; this has remained a strong area of interest with steady growth during the last decade.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 79% of respondents indicating interest in day hikes, 31% in leisure and hard surface hiking and 31% in family hikes. These data have been consistent over the five years collected.
- A new question was asked this year of those who responded that they were interested in arts and entertainment. These respondents were asked what types of arts activities were of interest. The most popular response was live music at 56%, followed by live theater at 41%. The Adirondack Watercolor event was noted as an attraction by 24% of respondents. Studio visits, gallery visits and art instruction each were selected by 14% of these respondents.

Traveler Spending and Conversion

- The average daily traveler party spending in 2023 increased to \$429 which is a 14% increase from the year prior. The total estimated average trip expenditure for 2023 visitors is \$1,590, or 11% higher from the prior year. It is notable that this is the second year of "double digit" growth in estimated visitor spending.
- Reported spending on lodging accounted for much of this daily expenditure growth at \$787 per stay and a new record high for this data point. It is more than \$100 higher than the prior year (\$667).
- The second largest expenditure categories within the spending profile, meals (at \$254) and shopping (at \$200) both stayed relatively consistent with the prior year data. Reported entertainment (\$106) and attractions/events (\$75) showed strong growth from that of the year prior. These key measures suggest positive economic trending.

- 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 82%.

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 20 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 2023 travelers also included adjacent Essex County. Traveler studies for the two-county region including the Villages of Tupper Lake and Saranac Lake in Franklin County, and 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 over time.

ROOST distributed the survey electronically to a sampling of its electronic database of visitors inquiring about visitation to Hamilton County during 2023. Surveys were collected quarterly throughout 2023. 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 online 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 230,000 invitations were sent by ROOST for the regional survey. Nearly 19,000 responses were received. This results in an approximately 8% response rate. The researchers are comfortable with this response, for which a minimum response of 6% is sought.

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. These data provide a second year of a return toward more typical visitor patterns following the pandemic. As noted by the US Travel Association, domestic travel across the U.S. saw a return to pre-pandemic levels (2019) by the end of 2022².

Several expenditure categories reported by Hamilton County visitors reported all-time highs, led in particular by lodging. Reported average lodging expenditures have grown an impressive 44% in the past three years. Daily expenditure levels, particularly in key areas of lodging and meals have been on a steady growth trend even before the recent two years of inflation. This is a strong point for creating significant regional economic impact.

A slightly higher number of visitors in this study are reporting from areas outside of New York state. This has been a several year trend and is likely positively impacting

tourism expenditures. Camping remains a strong proportion of Hamilton County visitors at just over one in four reporting parties.

The average income of visitors has grown steadily during this research, providing justification for the higher expenditures and continued capacity for continued growth. Another positive indication in this research is the improved measured conversion rate, the extent by which respondents note that travel information they received impacted their visit decisions. This has increased from 76% of respondents (who replied that travel information received positively impacted their travel plans) in 2019 to 82% in 2023.

The U.S. Travel Association predicts domestic travel to maintain slow growth during 2024. Statista² (the data source) reports the travel market expanding substantially due to greater ease of mobility and improved awareness of destinations due to widely accessible travel information.

ROOST and this research team continue 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, opportunities, 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	2023	2022	2021	2020	2019
Number of Completed Survey Responses	1,067	896	724	1,859	915	942
Average Income of Respondents ¹	\$94,084	\$103,280	\$97,395	\$90,000	\$90,000	\$89,745
Mean Age of Respondents	58	59	59	59	55	57
Respondent Gender	59% Female 41% Male	59% Female 41% Male	62% Female 38% Male	61% Female 39% Male	59% Female 40% Male	54% Female 46% Male
Average Night Stays/Party	4.2 Nights	3.7 Nights	3.8 Nights	3.7 Nights	7 Nights	3.2 Nights
Average Party Size	3.9 Persons	3.5 Persons	3.6 Persons	3.8 Persons	5.2 Persons	3.4 Persons
Conversion Factor Rate	81%	82%	83%	80%	81%	77%
Average Daily Expenditure per Party	\$318	\$429	\$375	\$314	\$167	\$306
Average Total Expenditure per Party per Trip	\$1,261	\$1,590	\$1,425	\$1,1162	\$1,167	\$963

1. 2020 AND 2021 MEASURED ONLY MEDIAN INCOME LEVELS MAKING AN "AVERAGE" AN APPROXIMATION

SOURCES CITED

1. U.S. Travel Association. "Travel- Forecasts" ustravel.org 1/17/24
2. Statista.com. "Domestic Travel Summary" 2024