



# Leisure Travel Study

2023 Hamilton County Visitor Focus

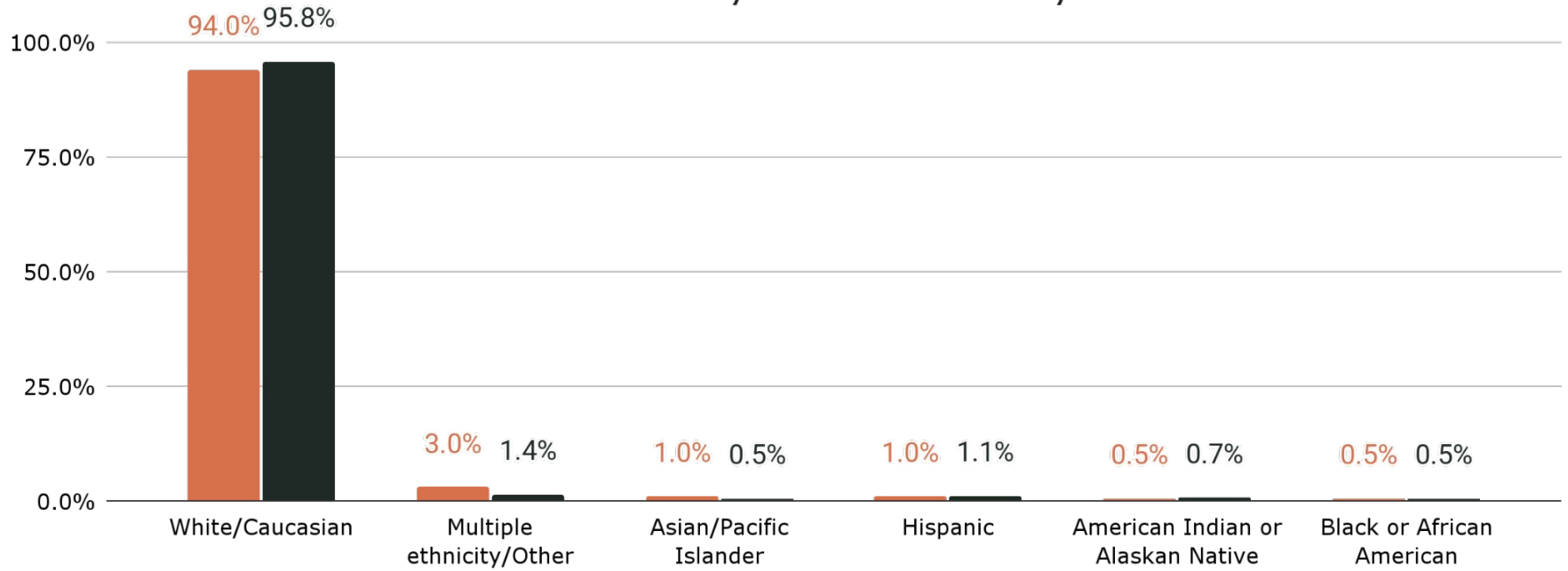
ROOST

# Project background and methodology

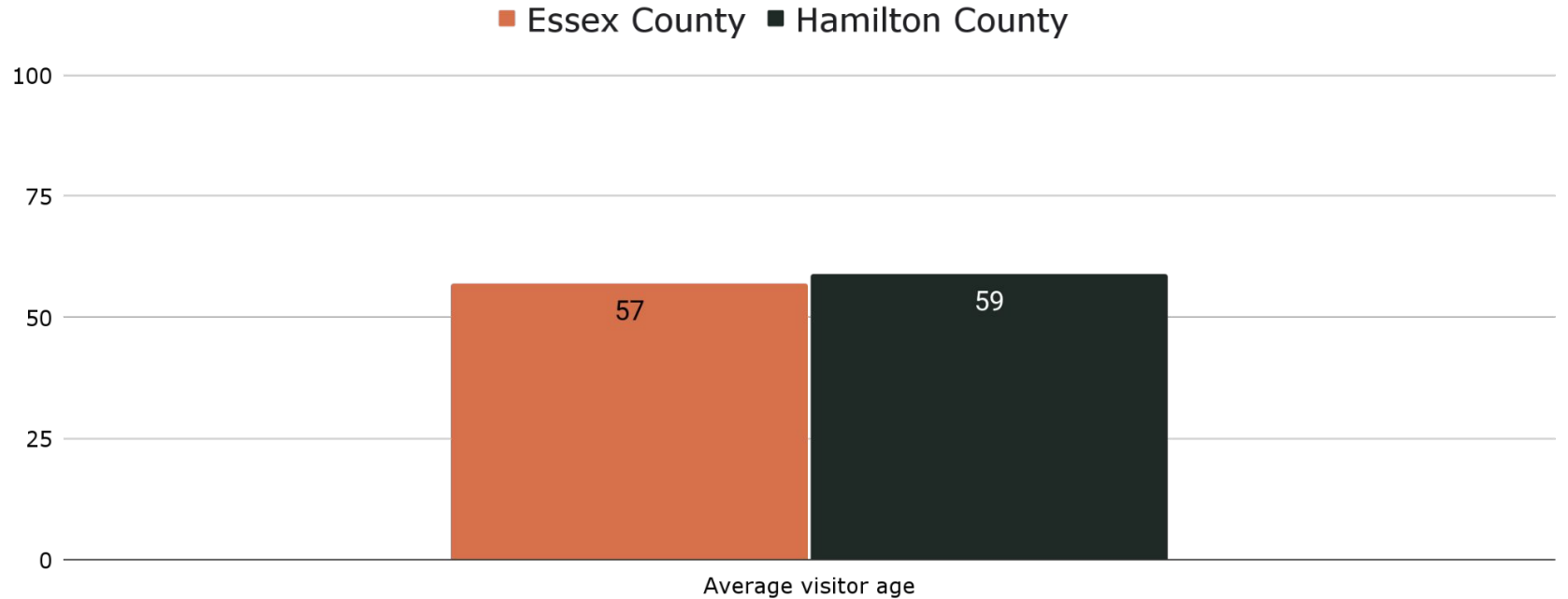
- ROOST commissioned a study with PlaceMaking, a regional community and economic development research firm, to determine visitor information at the county levels and to gauge key regional marketing program statistics.
- ROOST sent a jointly created survey to a sample of its 2023 leisure travelers to the region. This year's study marks 20 years of ROOST and partners completing this visitor research. 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 the region.
- In this report, "all travelers" refers to visitors to Essex and Hamilton counties, and the villages of Tupper Lake and Saranac Lake in Franklin County.
- 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 228,324 traceable leads who were interested in visiting the region in 2023. 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

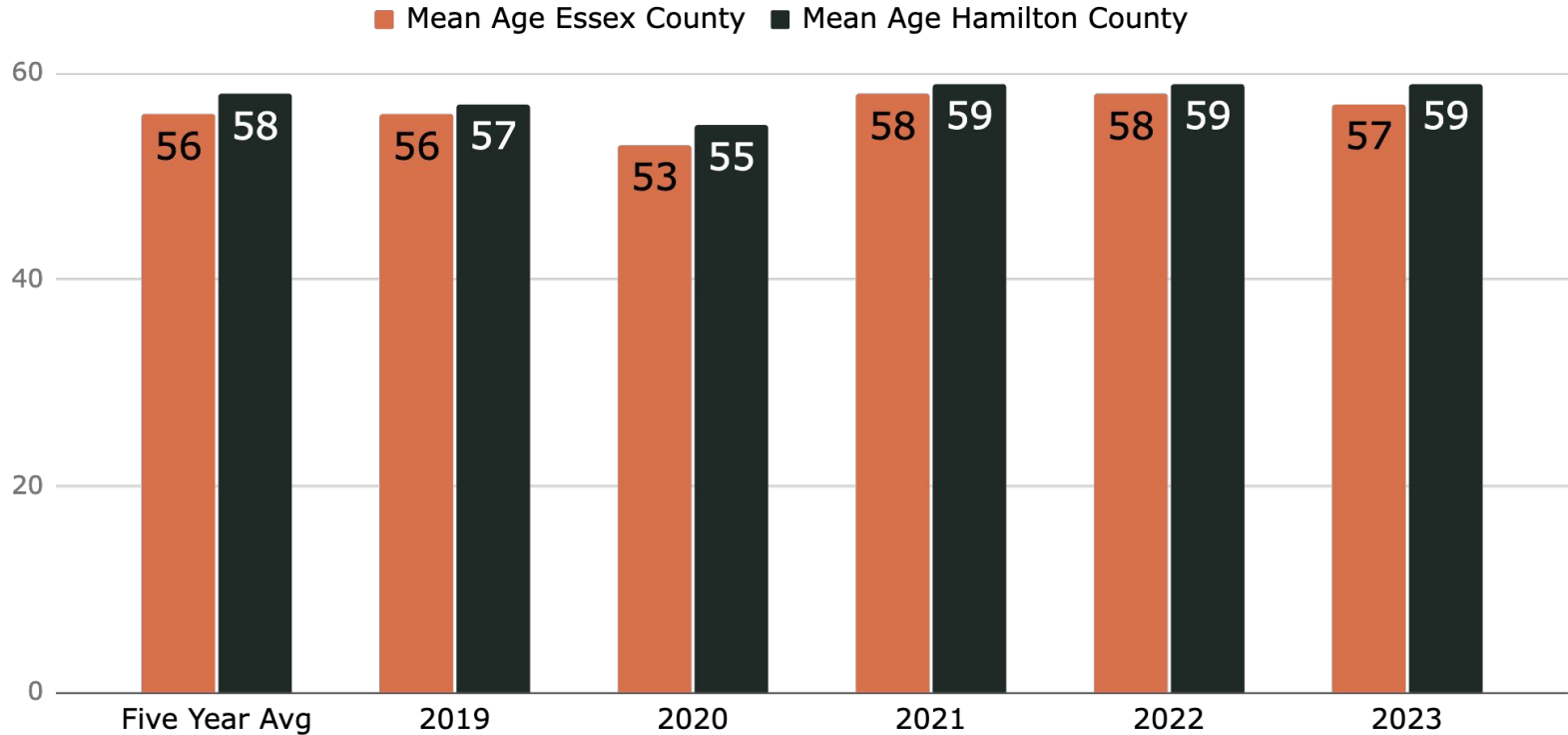
■ Essex County ■ Hamilton County



# Average age

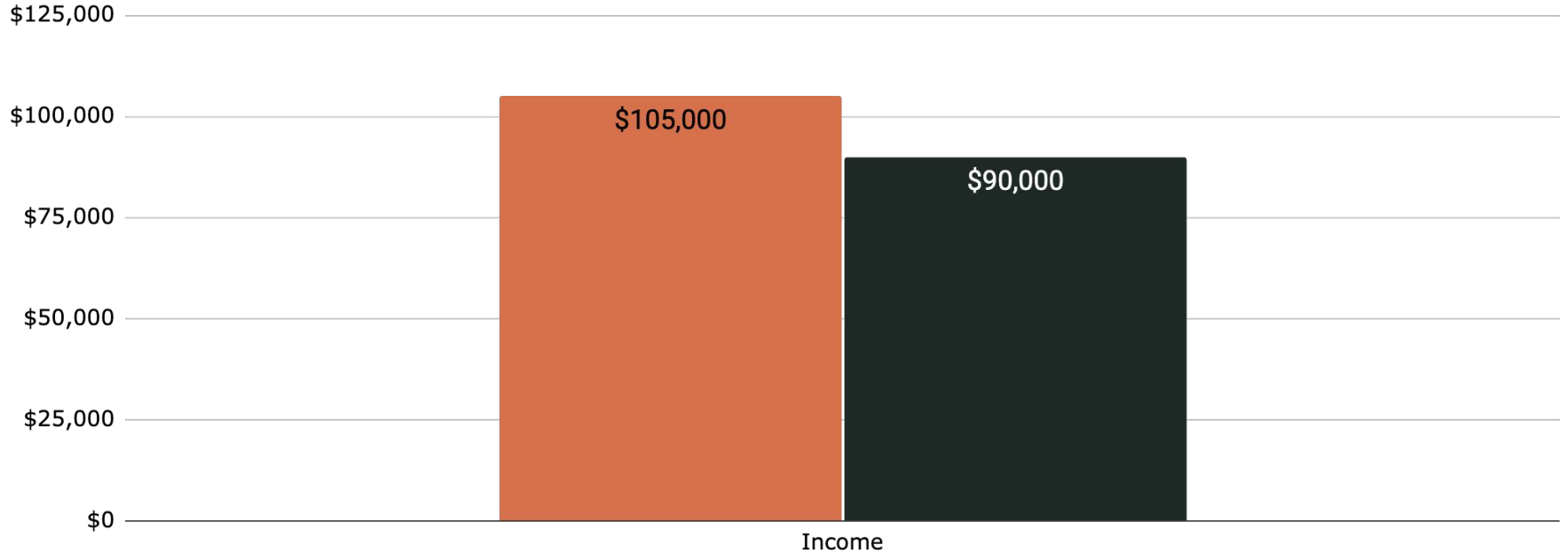


# Five year average age

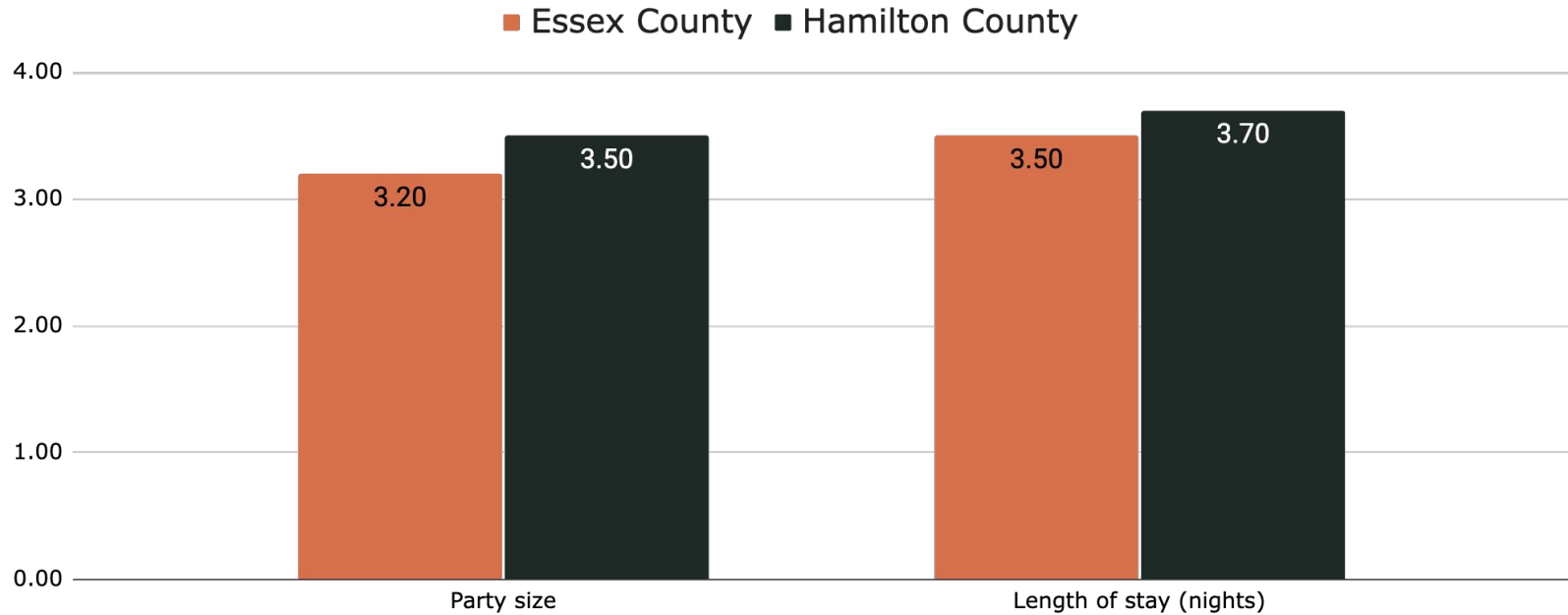


# Average income

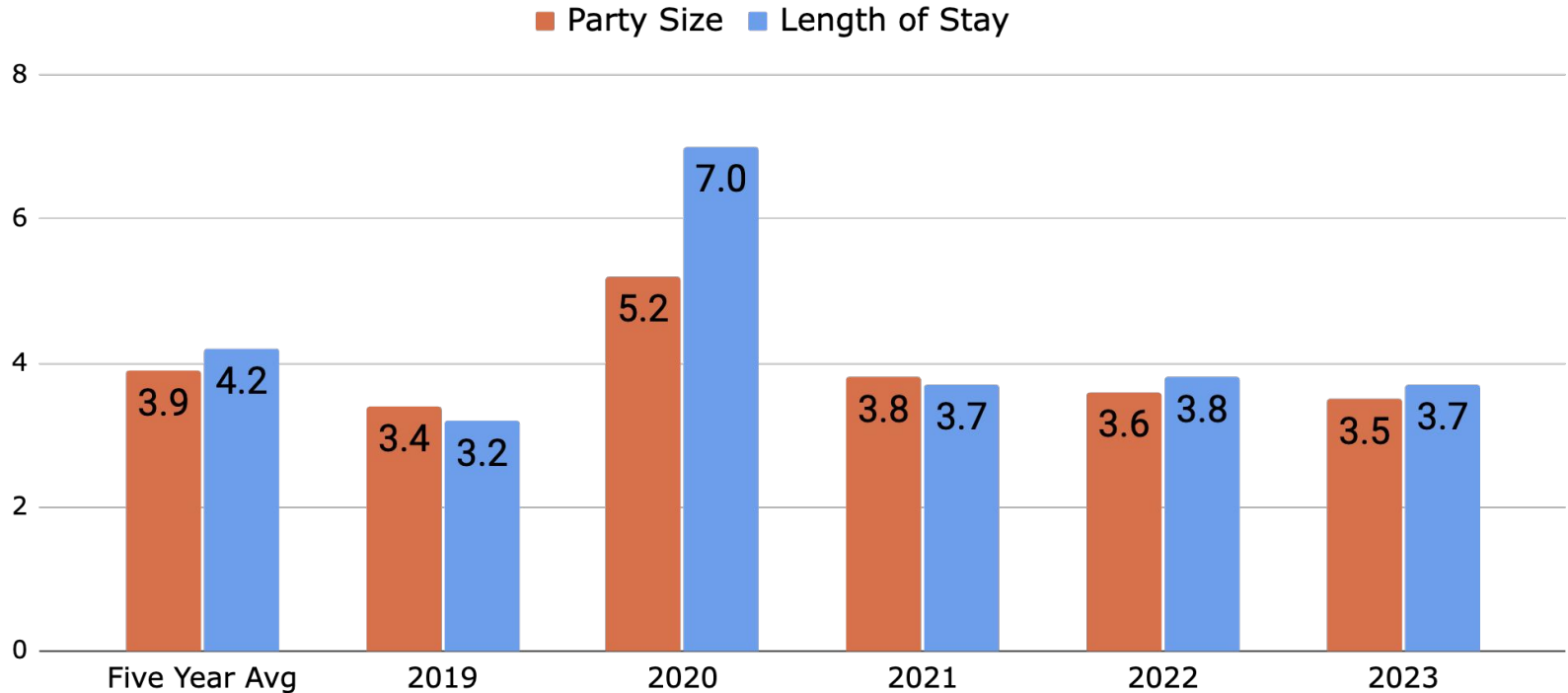
■ Essex County ■ Hamilton County



# Party size / Length of stay

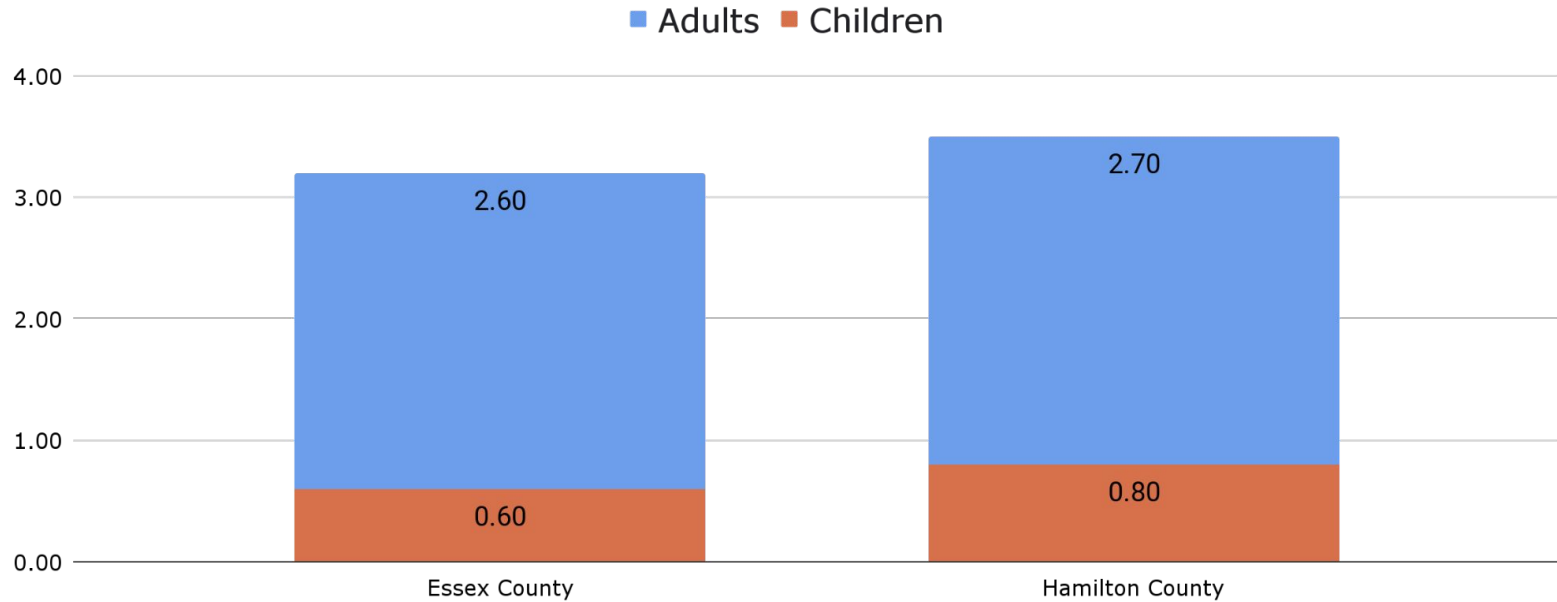


# Five year average party size / Length of stay - Hamilton County

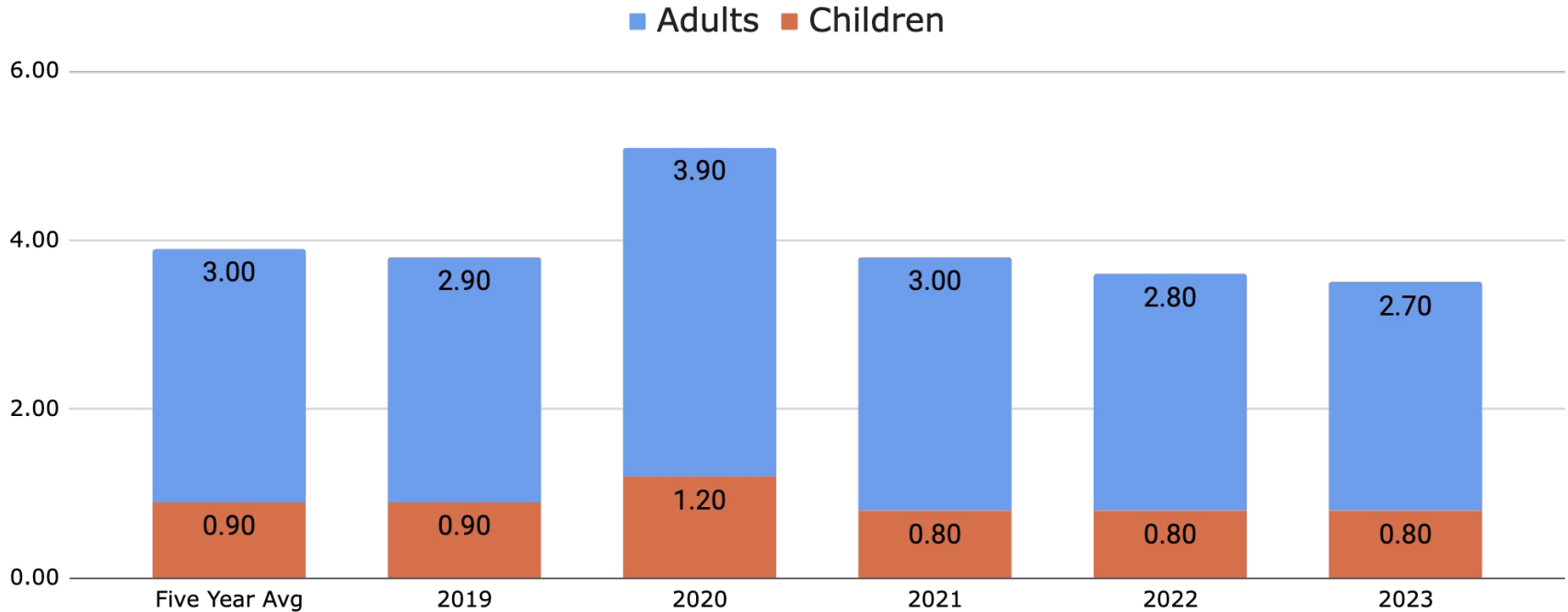




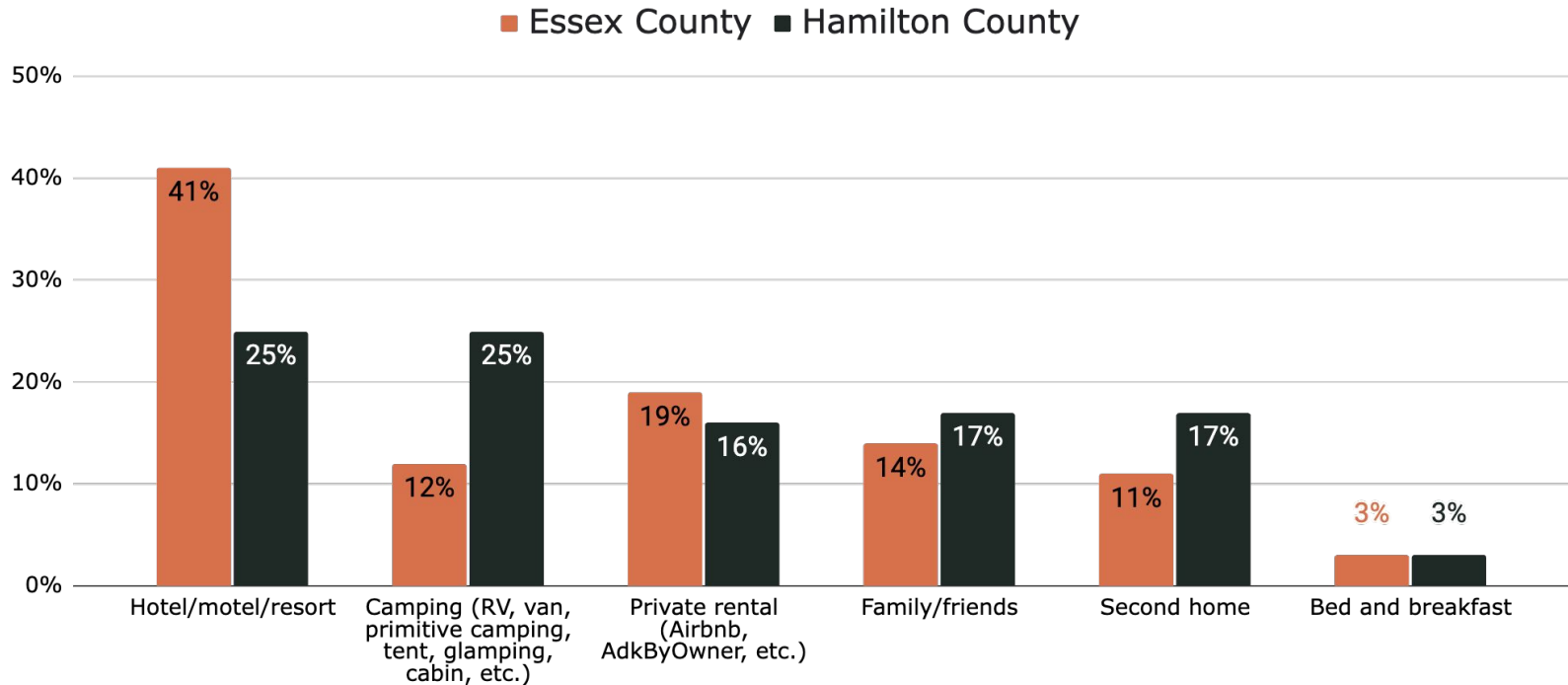
# Party composition



# Five year average party composition - Hamilton County

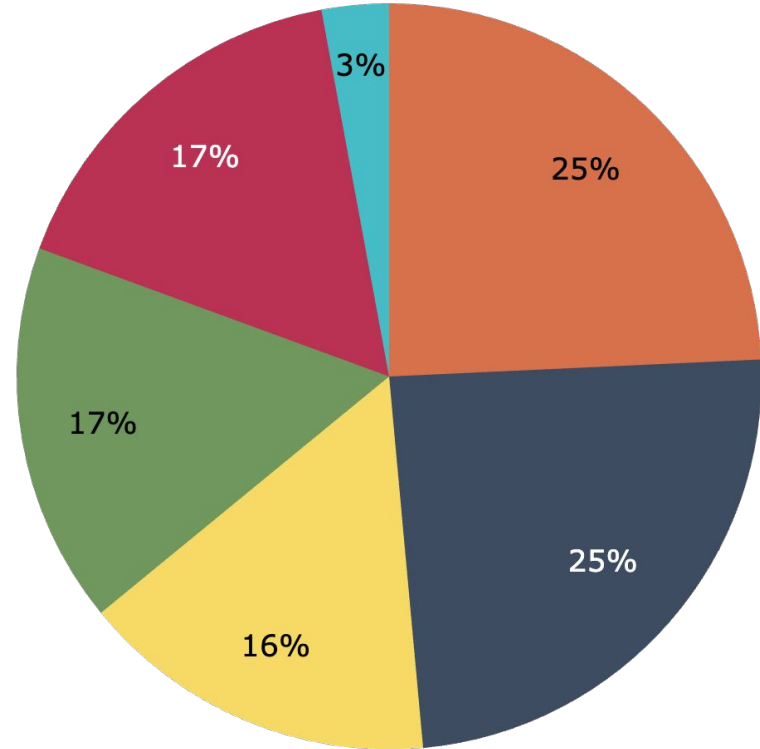


# Lodging accommodations

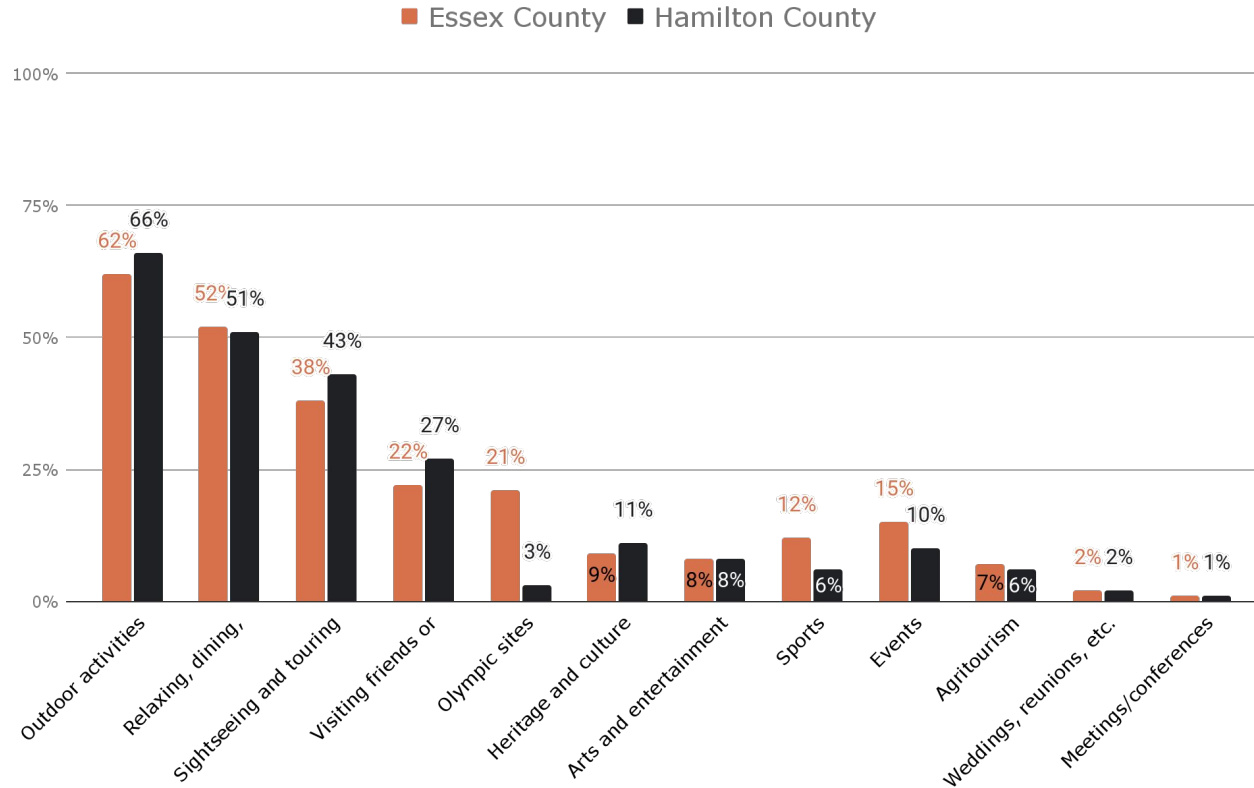


# Lodging accommodations - Hamilton County

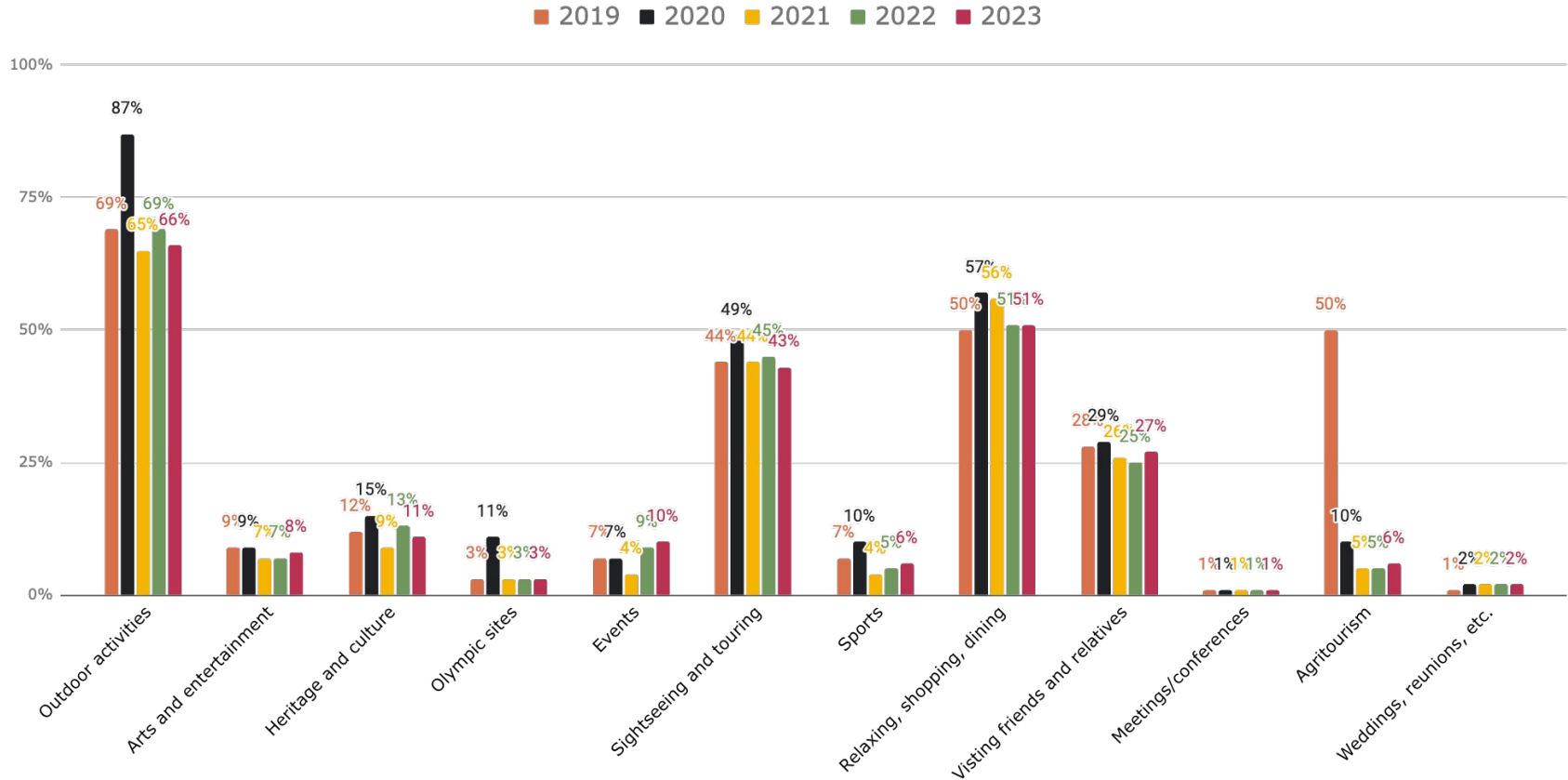
- Hotel/motel/resort
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.)
- Private rental (Airbnb, AdkByOwner, etc.)
- Family/friends
- Second home
- Bed and breakfast



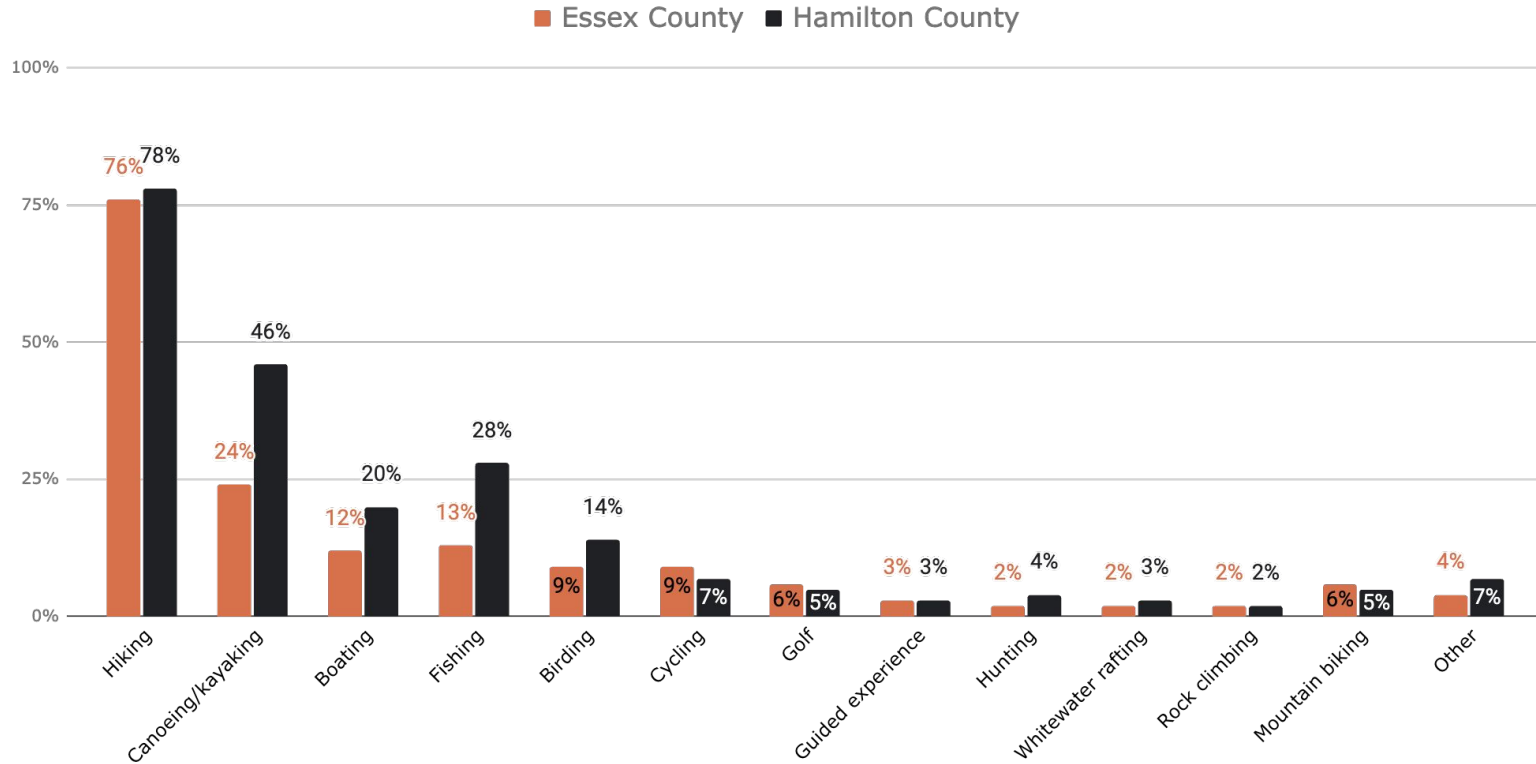
# Key attractions



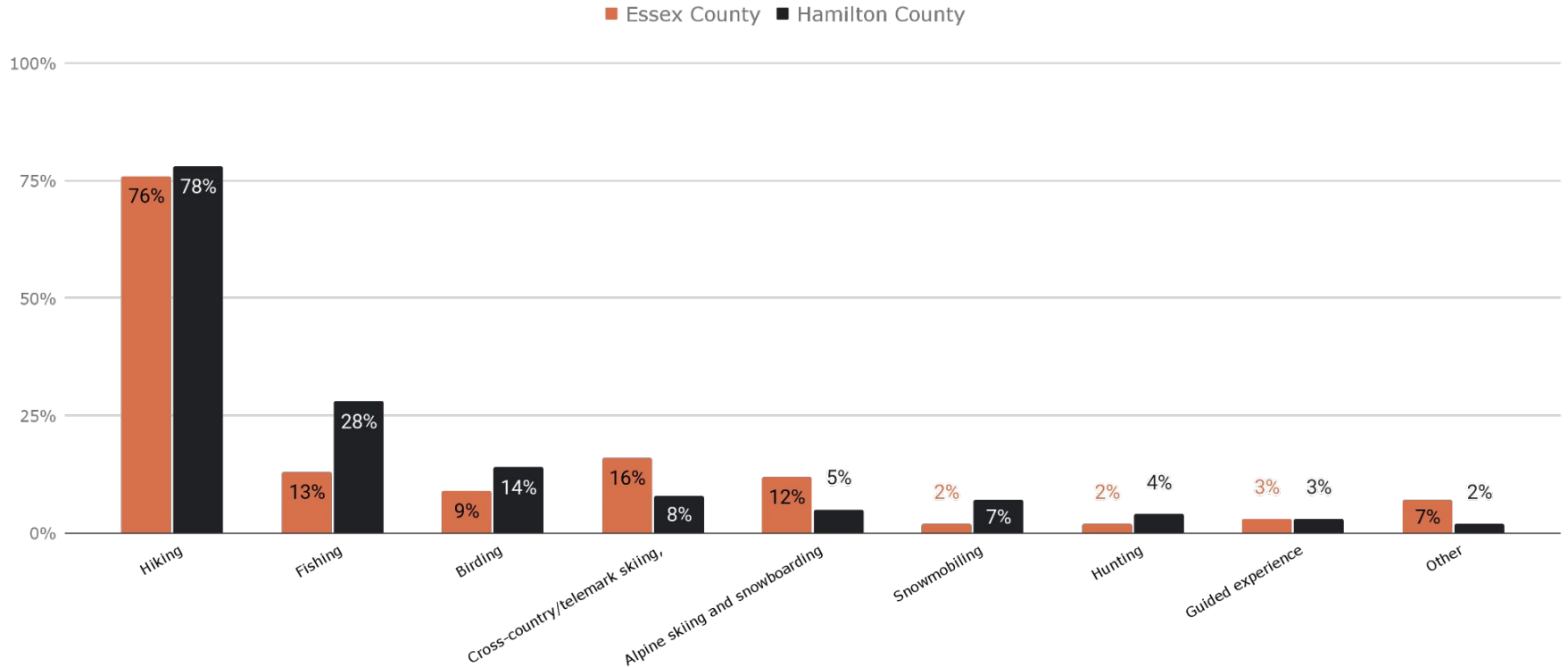
# Five year key attractions - Hamilton County



# Outdoor Spring/Summer activities

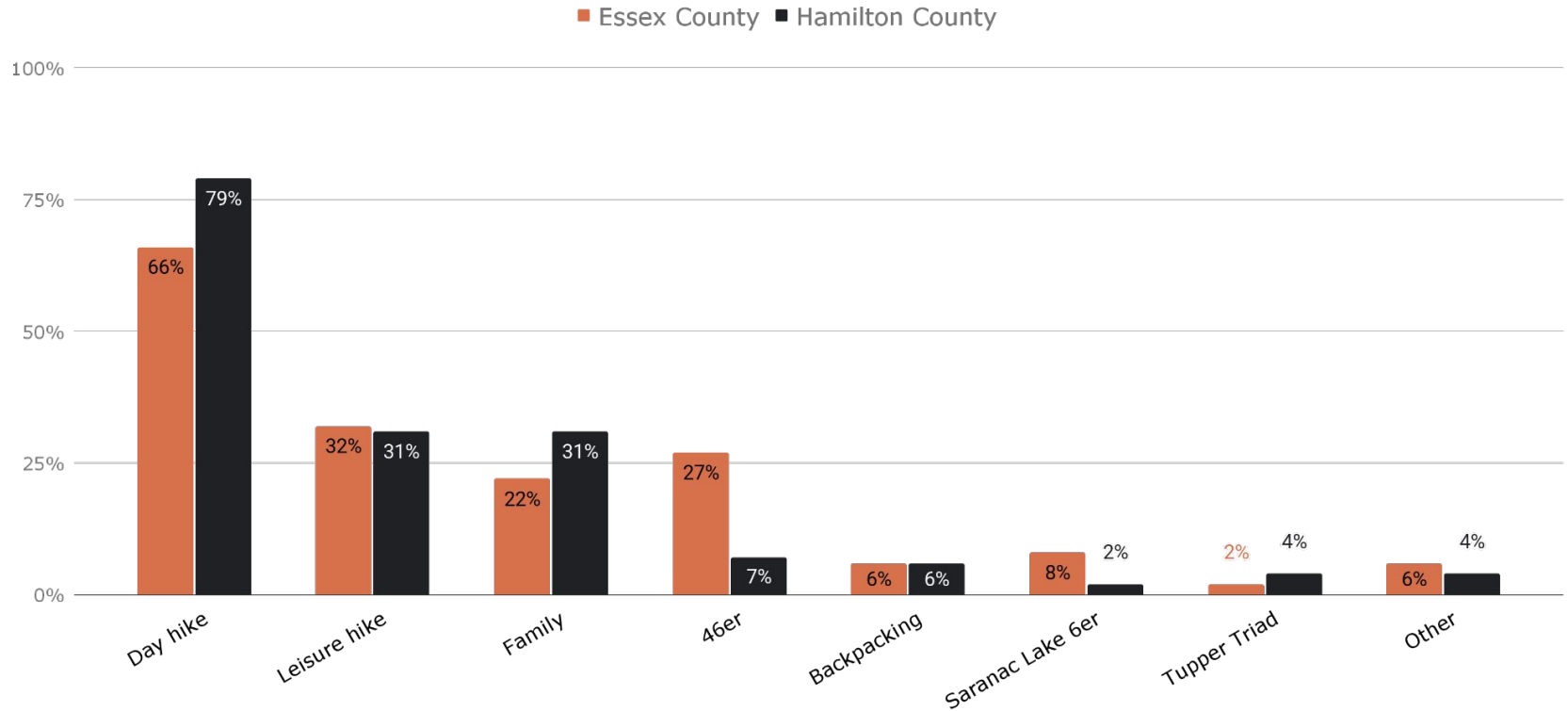


# Outdoor Fall/Winter activities

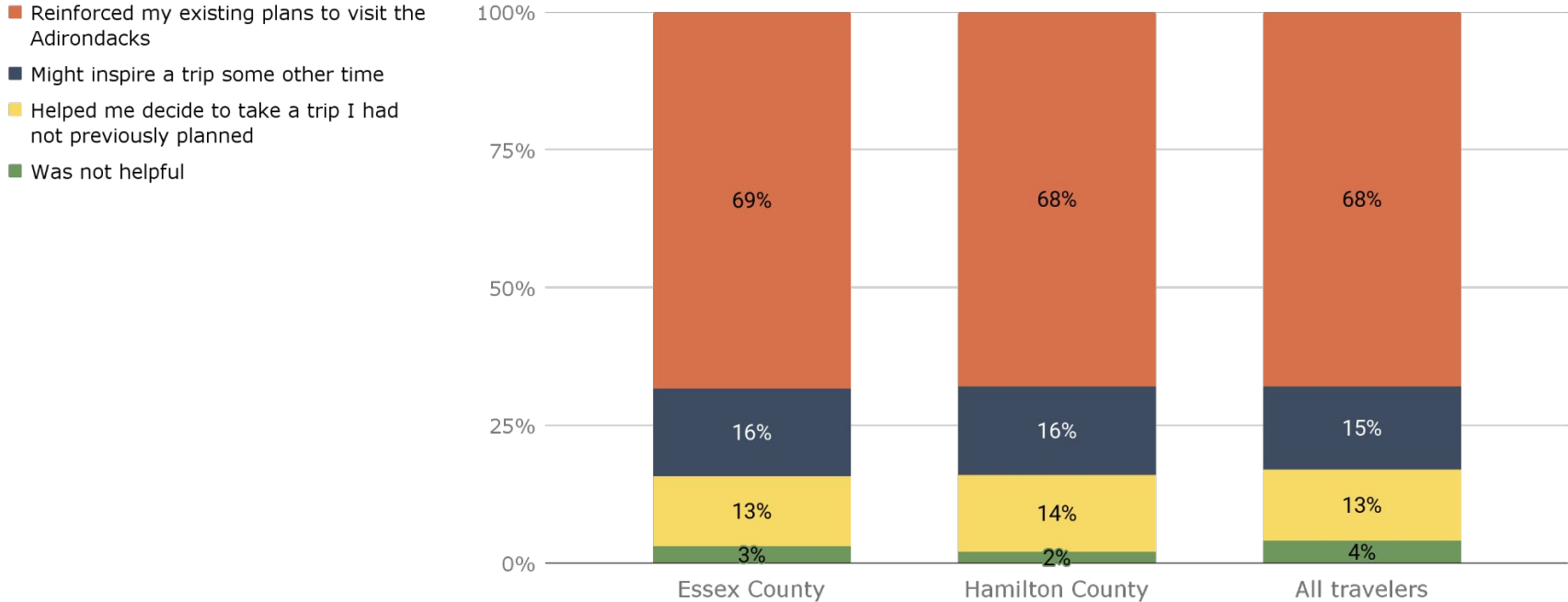




# Hiking breakdown

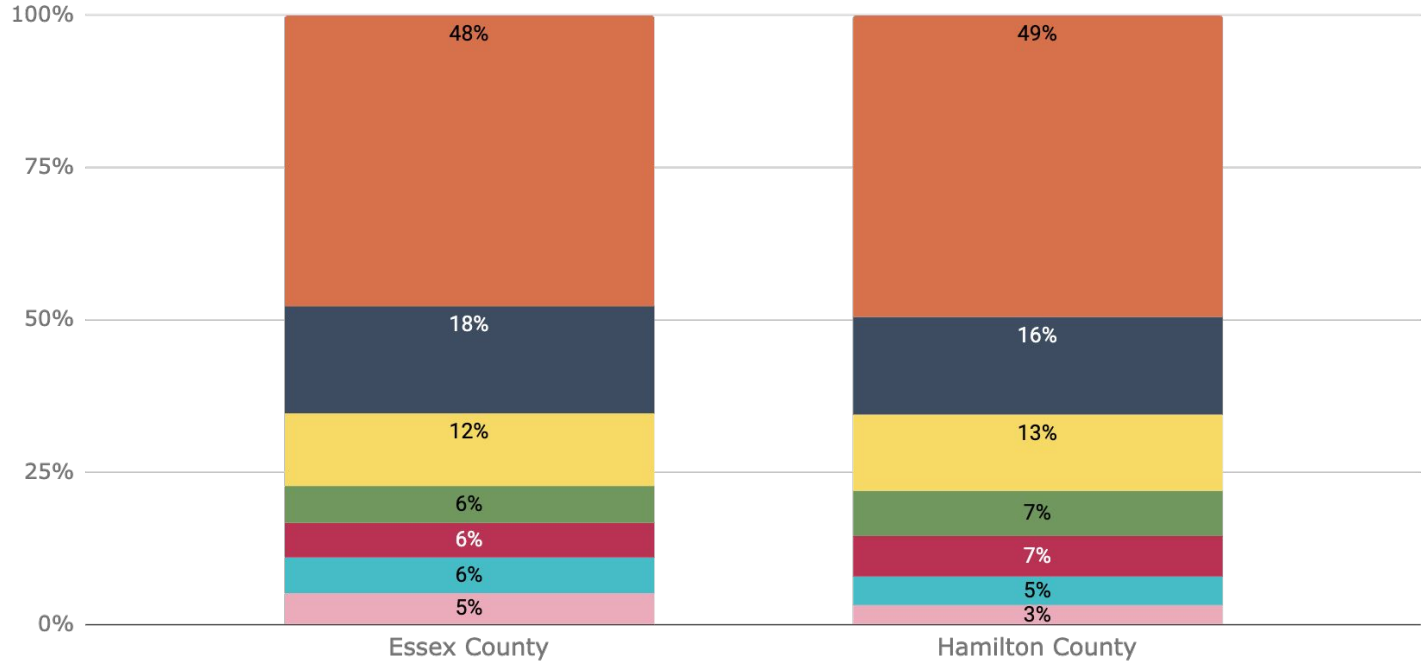


# Conversion rate from viewing ROOST marketing materials - Essex and Hamilton counties



# Total expenditure allocation by category - Essex and Hamilton counties

- Lodging
- Meals
- Shopping/retail
- Transportation
- Entertainment
- Attractions & events
- All other



# Mean party expenditures

	Essex County	Hamilton County	All travelers
Lodging	\$895	\$787	\$868
Meals	\$331	\$254	\$308
Shopping/retail	\$225	\$200	\$228
Transportation	\$112	\$118	\$106
Entertainment	\$109	\$106	\$98
Attractions & events	\$108	\$75	\$112
All other	\$98	\$50	\$48
Average daily expenditure	\$536	\$429	\$491
Average total expenditure	\$1,878	\$1,590	\$1,768

# Five year mean party expenditures - Hamilton County

	2019	2020	2021	2022	2023	Five year average
Lodging	\$390	\$527	\$527	\$667	\$787	\$580
Meals	\$200	\$312	\$221	\$253	\$254	\$248
Shopping/retail	\$146	\$184	\$174	\$210	\$200	\$183
Transportation	\$55	\$44	\$63	\$72	\$106	\$68
Entertainment	\$42	\$24	\$49	\$55	\$75	\$49
Attractions & events	\$53	\$63	\$86	\$120	\$118	\$88
All other	\$48	\$13	\$42	\$48	\$50	\$40
Average daily expenditure	\$306	\$167	\$314	\$375	\$429	\$318
Average total expenditure	\$934	\$1,167	\$1,162	\$1,425	\$1,590	\$1,256



# Hamilton County Visitor Profile

# Visitor profile – Hamilton County

- Average traveler party age of respondents was 59 years old, consistent with recent years.
- The average reported total traveler party size dropped for the second year among 2023 visitor respondents, to 2.7 adults and 0.8 child, or 3.5 overall.
- Visitation by respondents from within New York state stayed consistent with the last several years at 81% of respondents. Almost half (45%) reported coming from central or western New York. Twenty-seven percent (27%) reported coming from the Capital District or North Country. Six percent of respondents reported coming from the downstate/NYC region.
- Northeastern state visitors from outside of New York rose slightly from 12% in 2022 to 14% in 2023. Reported visitation from other U.S. regions than the Northeast was 5%.

# Visitor profile – Hamilton County

- Average stay length reported by 2023 travelers is 3.7 which is lower than the five-year average of 4.2.
- 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.
- 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.



# Visitor profile – Hamilton County

- 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-commonly reported outdoor interest (46%), followed by fishing (28%) and boating (20%).
- Reported interest in fishing grew from 10% in the prior year to 12% in 2023. Reported interest in cross-country skiing/snowshoeing grew from 4% to 8%. 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.
- 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.

# Visitor profile – Hamilton County

- 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, 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 in 2023 was \$787 per stay. It is more than \$100 higher than the prior year (\$667).
- Reported expenditure on meals (\$254) and shopping (\$200) both stayed relatively consistent with the prior year data. Reported expenditure on entertainment (\$106) and attractions/events (\$75) showed strong growth from that of the year prior.
- 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.
- The average income of visitors has grown steadily during this research, providing justification for the higher expenditures and continued capacity for continued growth.



# Regional Visitor Impacts

# Regional visitor impacts - All travelers

- Average traveler party age of respondents was 58 years old, fairly consistent with the five-year average.
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total of 3.2 persons. This result shows a three-year trend of slightly smaller average party sizes.
- Reported visitation by respondents from New York state rose slightly from prior year to 70% of visits.
- Visitors traveling from central/western New York comprised the largest group of these respondents at 32%, followed by northern New York visitors at 30% of visits, and just under 10% of visitors reporting from downstate New York.
- Northeastern state visitors outside of New York state were consistent from the last two years at 18% of respondents. Seven percent of visitors reported visiting from states outside the Northeast (with the highest proportion (4%) of those from southern U.S. states.
- Canadian visitation climbed slightly from recent years, with 3% of visitors reporting from Quebec and 2% from Ontario.

# Regional visitor impacts – All travelers

- Stay length reported by 2023 travelers dropped very slightly from that reported in 2022, to 3.6 nights. This is close to the five-year average duration of stay of 4.1 nights.
- Hotels/motels remained the most frequently reported lodging choice among 2023 traveler respondents (42%), with a growth in reported popularity in comparison to the last several years (where it ranged between 38-40%).
- Reported stays in short-term rental lodging dropped very slightly to 17% (from 18% in the prior year). Fifteen percent (15%) of respondents reported staying with family and friends, 12% reported camping (RV/tents), 11% reported staying in second homes and 3% at bed and breakfasts. These were only slightly different in proportion than reported accommodations in recent years.
- The highest ranking attraction to visit the region continued to be outdoor activities, with 65% of respondents selecting that this was a draw to visit.
- “Relaxing, dining, and shopping” remained another frequently expressed reason to visit the area by 53% of respondents. Sightseeing (40%) and visiting friends (25%) rounded out the top four areas of interest.

# Regional visitor impacts – All travelers

- One out of four respondents (25%) reported visiting family and friends as a draw to visitation, consistent with long-term data.
- More than three out of four (77%) 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 (29%), followed by fishing (17%), boating (14%), and cross-country skiing/snowshoeing (14%). Increases in reported popularity of fishing and cross-country skiing/snowshoeing are notable.
- Respondents were asked what types of arts activities were of interest. The strongest response to this question was live music at 63%. Art galleries represented a strong attraction as well, selected by 43% of respondents. Live theater was a noted attraction to 20% of these respondents.
- Expenditure levels reported by 2023 visitors continued to climb to the highest levels reported in this data collection. The average daily traveler party spending in 2023 was estimated at \$491.
- Total estimated reported trip expenditure was \$1,768 which is slightly higher than reported from the prior year.

# Regional visitor impacts - All travelers

- Reported spending on lodging (\$868) climbed 10% from the reported 2022 visitation levels, for three years of “double digit” increases. Reported meal spending climbed slightly from the prior year to \$308.
- Other expenditures categories demonstrated increases as well, except transportation, which declined slightly. This results in a robust total expenditure profile which includes shopping (\$228), entertainment (\$106), transportation (\$112), and attraction/events (\$98). Transportation costs have fallen across profiles in this year, very likely due in part to lower gasoline prices.
- Most expenditure categories reported all-time highs. Reported lodging expenditures continued to make dramatic increases from the prior year and over previous years. These increased levels have the added benefit of improving the occupancy tax revenues that the region can employ to further improve marketing and attraction efforts.
- Daily expenditure levels have been on a steady growth trend even before the last two years of inflation. This is a strong precedent for continued regional economic impact.



# Regional ROI Study



# 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:

228,324 (direct leads)  
X 82% (gross conversion factor)  
X \$491 (mean traveler party expenditure per day)  
X 3.6 (mean length of stay in nights)

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2023 is **\$330,940,112.**

# 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:

$$\begin{aligned} & \$330,940,112 \text{ (total estimated traveler revenue)} \\ & \div \$3,886,747 \text{ (total ROOST marketing expenditures)} \end{aligned}$$

This produces a conservatively-estimated ROI of 91:1 in leisure traveler-related revenue for every marketing dollar expended.