

Sustainability Survey Analysis - April 2024

Background-

The Regional Office of Sustainable Tourism (ROOST) has long worked toward the sustainability of its tourism assets. For the second consecutive year, ROOST employed a survey to a sampling of those who inquired about travel to the region in 2023. The purpose of this survey was to ascertain visitor and potential visitor opinions and perceptions about sustainability relative to travel decisions.

Over 1,500 (1,521) visitors and potential visitors responded to this survey. This shows a substantial growth from the prior year's 991 respondents. A majority (63%) of respondents reported that they are New York residents, with 31% from central and western New York state, and 24% from the capital district north. Nine percent (9%) of respondents reported from downstate or the New York City region.

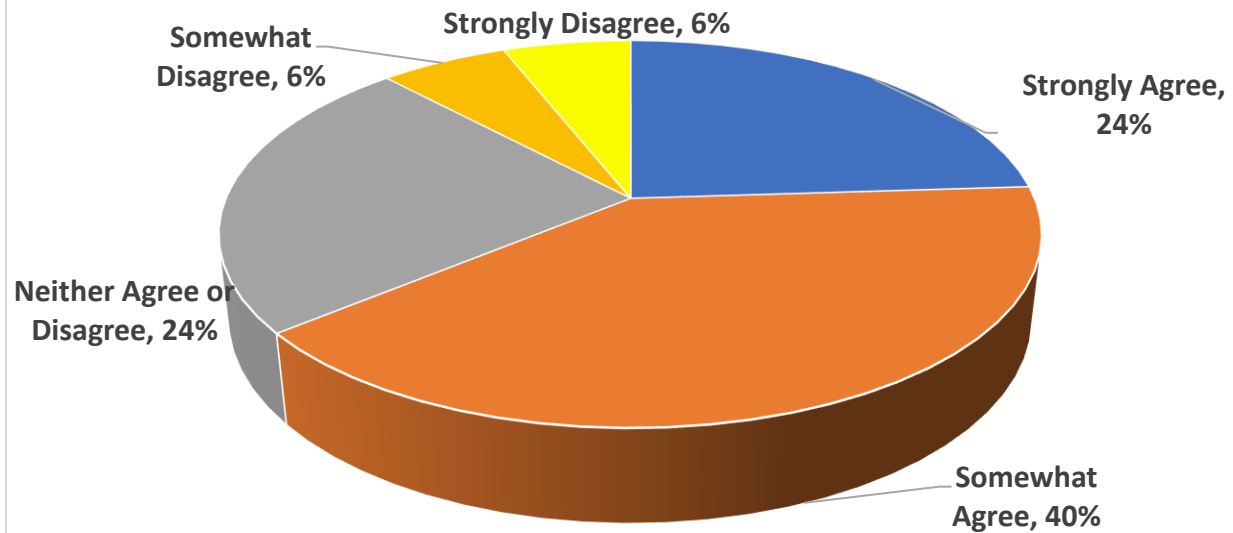
Twelve percent (12%) of these respondents are from the northeast U.S. outside of New York state and 6% each of respondents are from the southern U.S. and mid-western-US. Ten percent report from Canada (5% each Quebec and Ontario) and 3% from the western U.S. These area of residence figures are reasonably close to those provided by ROOST's comprehensive visitor survey which measures demographics, visit preferences, visit expenditures and other details of regional and county visitors¹. A slightly higher proportion of visitors from outside of the northeastern U.S. and from Canada responded to this survey (by about 5% more in each group).

Importance of Sustainability in Planning a Trip

Survey respondents from the full visitor group (from the above referenced travel study) were asked how important sustainability factors are when they plan a trip.

The following provides the results of this question, which demonstrates that to a strong majority (64%) of this group, sustainability is at least a moderate consideration. See Figure 1 below for full distribution by percentage.

Figure 1. Importance of Sustainability to Travel Choice

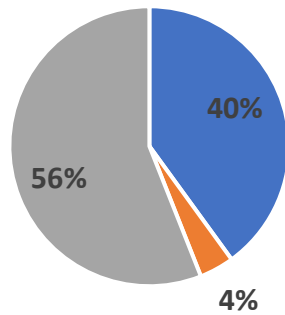


A question was asked to this survey audience about the importance to their travel decisions of the three core areas of sustainability: social, economic and environmental sustainability. Environmental sustainability was the strongest area of expressed importance, with 99% of respondents selecting that it is “very” or “moderately” important to their decision. Ninety-seven percent (97%) of respondents expressed economic sustainability as “very” or “moderately” important. Social sustainability was selected as “very” or “moderately” important by 87% of respondents.

Perceived Sustainability of the Adirondacks as a Destination

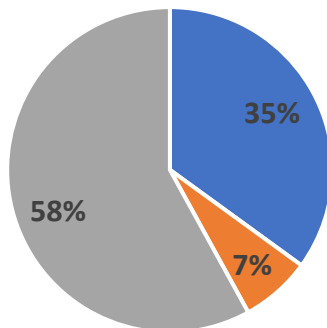
The survey asked respondents the level of effort that they perceived the region, as a travel destination, was making in these three sustainability categories: social, economic, and environmental. Figures 2-4 provide the results.

Figure 2. Perceived Efforts for Social Sustainability of Adirondacks-



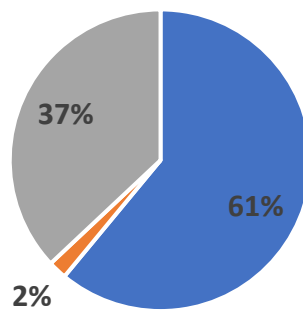
■ significant effort ■ no effort ■ some effort

Figure 3. Perceived Efforts for Economic Sustainability



■ significant effort ■ no effort ■ some effort

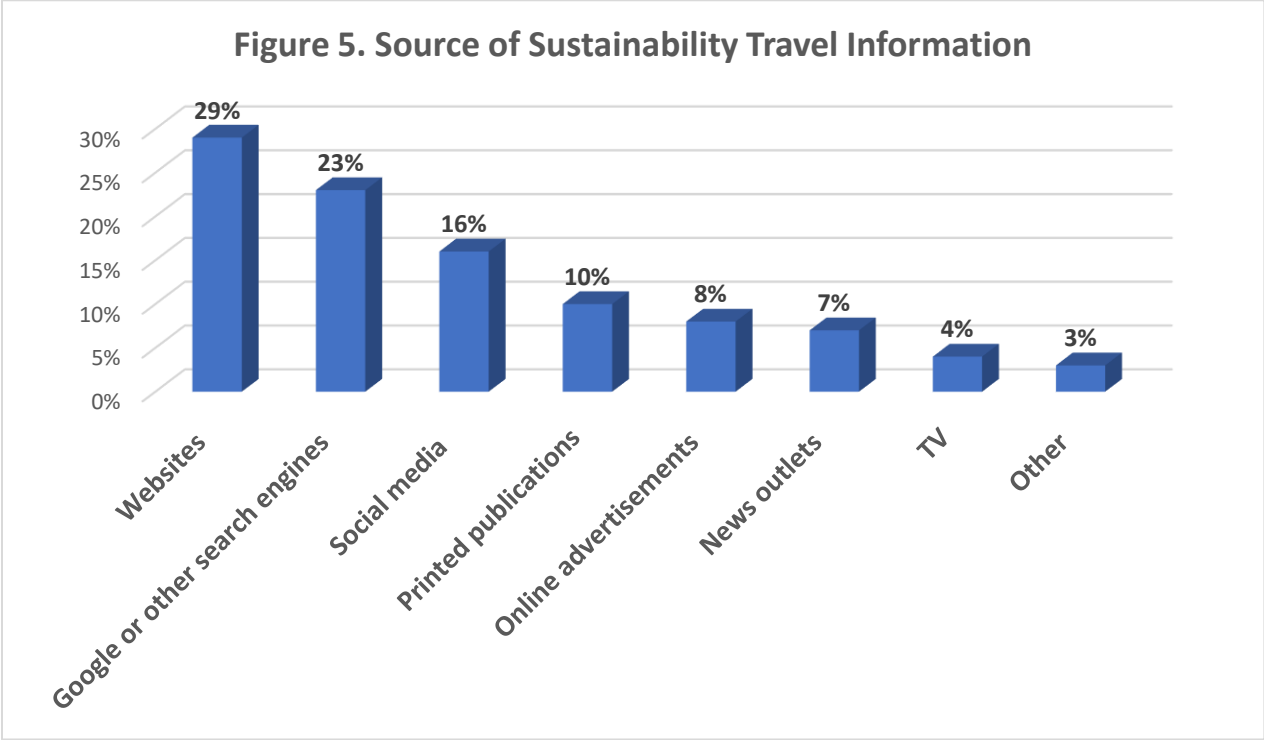
Figure 4. Perceived Efforts for Environmental Sustainability



■ significant effort ■ no effort ■ some effort

Travel Information: Sites for Sustainability Research

The survey asked visitors and potential visitors where they typically find their information about the sustainability of a destination, permitting as many responses as applicable. The following (Figure 5) depicts the highest to lowest most common responses:

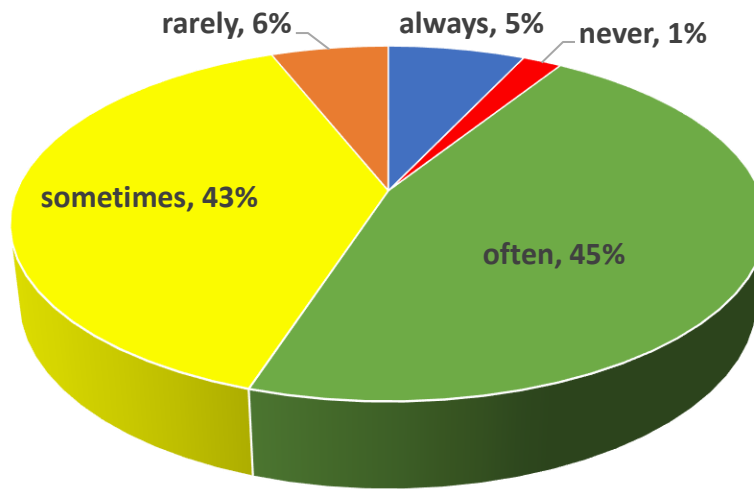


The proportion of responses to these sources were like that found in the year prior, except for an increase in those responding “television” sources and “other.”

Influence of Sustainability Practices

The survey asked how often a company’s sustainability practices influenced the respondents’ decision to purchase from them. Figure 6 below depicts these responses.

Figure 6. Frequency of Influence of Company's Sustainability on Purchases



More than ninety percent (93%) of respondents indicate that sustainability at least “sometimes” affects purchase decisions. This is a slightly higher proportion than selecting these three categories (91%) in the prior year. Half of respondents indicate that this is a factor of consideration at least “often.”

Impacts on Traveling Decisions by Possible Sustainability Factors/Actions

The survey asked respondents to check from a substantial list of sustainability practices which they “looked for” when planning a vacation destination. Respondents were allowed to select as many as applied. The following list provides results from the most common to least common selections of the top responses (selected by nearly half or more of respondents). The number of responses received for each category are in parentheses.

1. Restaurants in the region buy from local suppliers (1,241)
2. Businesses in the region support the local economy (1,158)
3. Businesses sell local artisan products and services (1,116)
4. Funds generated by tourism used for improving the local community (999)
5. Businesses in the area founded by residents (882)
6. An effort to reduce single use plastic (879)
7. Restaurants focusing on reducing food waste (857)
8. Businesses in the region give back to the community through work with local charities (851)

9. Choosing road trips over airlines and cruises (788)
10. Public transportation to popular attractions (766)
11. Plans to manage hiking traffic and limit impacts on trails (762)
12. Businesses using renewable sources of energy (760)
13. Filtered refill stations for reusable water bottles (722)

The input is, not surprisingly, widely varying in response. The full table of responses is attached as Appendix A.

Ease of Finding Information on Sustainability

The survey asked respondents about the ease of finding information about the sustainability of a travel destination. A slight majority of respondents (56%) stated that it is “difficult” to find information, with the balance (44%) finding it “easy”. This shifted in response just slightly from the prior year when 58% remarked that finding this information was difficult.

Conclusion

While sustainability has been a focus within ROOST for many years, this is only the second year that a survey was conducted to gauge information specific to visitor perceptions regarding sustainability. The initial data provides interesting indications of priorities.

Travel experts emphasize that sustainability is a growing concern expressed by an increasing proportion of visitors. A National Geographic survey² found nearly half (42%) of U.S. travelers expressing in interest in “sustainable” travel. Only 15% of these interested respondents, however, responded that they had sufficient understanding of what this term means. This provides a great opportunity for the region to tap this demand and to define and educate visitors about what is “Adirondack sustainability.”

We know that many guests are looking for “green” experiences. Green hotels, resorts and experiences capture the growing interest in wellness tourism, which is a strengthening niche across the industry. Many corporations, governments and associations prefer or require a component of “green” meetings, making earning sustainability certification a valuable differentiator that unlocks business opportunities.

The Adirondack region is extremely well poised to utilize sustainable practices as a marketing tool to individual and group markets moving forward.

The United States is not well positioned for sustainable visitation due to less transit/rail and larger geographic distances, than some regions such as across western Europe. An examination of top-ranked areas for sustainability shows largely western European cities, with Montreal, Canada also included³. The Adirondacks, being a world example of a “living park” provide an excellent opportunity to continue to highlight the sustainable model in practice across this U.S. region.

This baseline data is useful in moving forward with better understanding of visitor preferences and to monitor and concentrate on specific areas of interest, in future years.

Sources Cited:

1. Leisure Visitor Study for the Adirondack Region of Essex and Hamilton Counties, NY- Regional Office of Sustainable Tourism (ROOST) - www.roostadk.com April 2023.
2. National Geographic- “For many travelers sustainability is the word- but there are many definitions of it”. Nationalgeographic.com - 6/28/22.
3. Global Destination Sustainability Movement. “30 Top Cities” – www.gds.earth-2023

Appendix A.

Table of Responses (#) for Sustainability Factors Sought for Travel Decisions

Restaurants in the region buy from local suppliers: 1,241

Businesses in the region support the local economy: 1,158

Businesses sell local artisan products and services: 1,116

Funds generated by tourism used for improving the local community: 999

Businesses in the area founded by residents: 882

An effort to reduce single use plastics: 879

Restaurants focusing on reducing food waste: 857

Businesses in the region give back to the community through work with local charities: 851

Choosing road trips over airlines and cruises: 788

Public transportation to popular attractions: 766

Plans to manage hiking traffic and limit impacts on trails: 762

Businesses using renewable sources of energy: 760

Filtered refill stations for reusable water bottles: 722

Businesses donate to local nonprofits: 609

Lodging and restaurants partnering with local compost producers: 592

Use of environmentally safe snow removal practices (e.g. avoiding the use of products with high salt concentrations): 540

Bicycles rentals available as a means of transportation: 486

The ability to donate money to support environmental efforts in the region: 482

Availability of electric vehicle charging stations: 201

None: 197

Zoning restrictions to prohibit short term rentals: 171

Access to electric scooters: 151

The option to pay extra to offset carbon emissions: 143

Other (please specify): 40