

2025 Visitor Study and Marketing Analysis

ADIRONDACK REGION

*Essex County, Hamilton County, Saranac Lake and
Tupper Lake, NY*



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ROOST

Prepared by: PlaceMaking
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BACKGROUND

In 2025, the Regional Office of Sustainable Tourism (ROOST) continued to manage marketing tourism assets for Essex County, Hamilton County, the Saranac Lake region, and the Tupper Lake region. ROOST commissioned a study to determine visitor information at the county levels and to gauge key regional marketing program statistics. This year's study is the 22nd year of ROOST and its partners completing this visitor research.

ROOST contracted with PlaceMaking, a regional community and economic development firm, to complete this research. ROOST sent a jointly created survey tool to a sample of its 2025 leisure visitors to the region. Visitors completed an online survey, via email, and the results compiled responses received from visitors who spent most of their time in this defined portion of the Adirondack region.

This report provides regional visitor data and a summary of marketing/return on investment (ROI) analysis. These data exclude large group and business market segments, focusing on leisure visitation. 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 216,713 traceable leads who expressed interest in visiting the region in 2025.

PlaceMaking also compiled similar research for Essex and Hamilton counties individually; these reports are available under separate covers. Accompanying research provides a more in-depth look at day visitors, those who stayed in short-term rentals during their visit, and a deeper look into sustainability interests of visitors for whom that is a key factor.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the 14th year. The study has employed a similar methodology for more than 20 years, allowing for comparison across a long range of data. PlaceMaking and ROOST collaboratively designed the survey instrument to gather information from its leisure visitors and to measure regionally the return on investment in marketing expenditures.

Survey results segmented data by where the visitor indicated spending the most time. The team acknowledges that this is not an exact measure, but the researchers believe

that this provides reasonable results as the methodology has shown credibility and reliability across many applications.

ROOST distributed the survey electronically to a sample of its database of potential visitors who inquired about trips to the Adirondack region during 2025, quarterly, following the period in which they had inquired about visitation. Surveys were modified slightly by seasonal activities.

Those invited to participate in the survey represent traceable direct inquiries acquired by the ROOST team. This includes respondents who requested travel information through the agency's websites, through social media outlets (Twitter, Facebook, YouTube, and Instagram), digital information forms, telephone, printed materials, and in-person inquiries. Potential visitors provide their contact information to be identified (and tracked) as unique respondents. This study does not take into consideration the potentially large group of individuals who view travel materials via websites, etc., and are subsequently influenced to travel to the area, but do not provide traceable information to ROOST.

The survey is predicated on national and regional research with similar purposes and refined based on the experience of tourism professionals and validity checks over the two (plus) decades of this research. The online survey provides Adirondack-related incentives to randomly selected respondents for survey completion. Incentives for survey completion contribute to a higher survey return rate without measurably skewing data.

ROOST sent approximately 216,000 invitations for the regional survey. Just over 21,000 complete responses were received and then tabulated for valid responses. This results in an approximately 9% response rate, roughly consistent with prior years.

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

SUMMARY VISITOR DATA

Highlights of 2025 visits to the region included:

Demographics and Visit Information

- Over 216,000 individuals contacted ROOST via its various outlets for travel information about the region in 2025. This is just below the five-year average.
- The average traveler party age of respondents was 59 years old, just slightly older than the five-year average (58).
- Median reported household income was \$118,000 which shows a fifth consecutive year of steady increases (five-year average is \$109,000).
- The average reported total visitor party size was 2.7 adults and 0.6 children, for a total of 3.3 people. This is consistent with the previous year's party size reported at an average of 3.3.
- Respondents included 53.9% females, 45.8% male, and 0.3% non-binary or other gender response.
- Visitors continue to report White race (94.9%). Two percent each report mixed races or Hispanic ethnicity. Less than one percent each report Asian/Pacific Islander, Black/African American race.
- Just over two-thirds (69%) of respondents reported being New York state residents. This is just slightly higher than the 67% reporting from New York state in the year prior.
- Visitors traveling from the capital district and northern New York comprised the largest group of these New York state respondents (33%), followed by central New York (21%), western New York (11%) and 10% downstate/New York Metro-Long Island. A greater proportion of visitors from central and western New York than in the prior year reported, a second consecutive year of increased survey respondents from these sub-regions.
- The proportion of visitors from Northeastern states outside of New York was consistent from the last several years (20% of respondents). Seven percent of visitors reported visiting from states outside the Northeast (with the highest proportion of these 4%- from southern U.S. states)
- Reported Canadian visitation declined slightly from the prior year with 3% of visitors reporting from Quebec and 2% from Ontario.

- The average stay length reported by 2025 visitors rose to 4.3 nights. The length of stay has increased steadily over the last several years, with a five-year average of 3.8 nights.
- One out of four (25%) visitors reported they came to the area in peak summer-July/August, followed closely by “foliage season” September/October (22%) and early summer (May/June at 22%). Reported visitation in the early summer was a new high, dominated by the month of June.
- Reported visitation in peak winter (January/February) increased slightly from the prior year (from 11% to 14%) and early winter (November/December) showed reported declines (from 11% to 8%). Spring visitation (March/April) remained consistent from the prior year at 9%.
- Hotels/motels remained the most frequently reported lodging choice among 2025 traveler respondents (40%), consistent with the proportion noting that accommodation choice for the prior year.
- Reported stays in short-term rental lodging (19% of respondents) increased slightly from the prior year (from 17%). Visitors noting staying with family and friends and camping declined slightly from the prior year (both from 15% to 13%). Second home (12%) and bed and breakfast (3%) accommodations both remained consistent from the prior year.

Interests

- 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 the region.
- “Relaxing, dining and shopping” was the second-most frequently expressed reason to visit the area by 51% of respondents. Sightseeing (38%) and visiting friends (24%) rounded out the top four areas of interest to visit. These figures are consistent with recent years of data.
- Nineteen percent (19%) of respondents reported visiting Olympic sites and events as an attraction, an increase from prior year (16%) which may be due to elevated interest as Winter Olympics would be occurring in early 2026. Reported interest in events (16%) also increased slightly (from 13%) from prior year.

- Those visitors who reported interest in outdoor activities selected hiking as their area of greatest interest by a wide margin. The top ten most popular reported outdoor activities by survey respondents are, 1) hiking, 2) canoeing/kayaking, 3) fishing, 4) boating, 5) birding, 6) skiing/snowboarding, 7) cycling, 8) cross country skiing/snowshoeing, 9) golf, and 10) mountain biking. Birding interest has increased over the last decade, otherwise activity interest by order of magnitude has remained consistent.
- A question regarding hiking preferences continues to indicate a five-year trend of strong preference in casual hiking, with 70% of respondents indicating interest in day hikes, 45% leisure and firm surface hiking (a marked increase from year prior to 33%), and 25% family hikes.
- For the third year in this research, respondents who selected that they were interested in arts and entertainment were directed to an additional question to select specific areas of interest. Of these, 45% expressed interest in live music and 20% expressed interest in art galleries. Seventeen percent of respondents expressed interest in live theater, 8% in art studios, 5% in pottery, and 3% each in instruction or “paint and sip”.

Traveler Spending and Conversion

- Expenditure levels reported by 2025 visitors continued to climb to the highest levels reported within this research. The average reported daily traveler party spending in 2025 is \$445. While this is not a record figure itself, the average reported stay length increased, therefore the total estimated visitor expenditures increased. The total estimated reported trip expenditure was \$1,914, an 8% increase over that reported by 2024 visitors.
- Reported trip spending on lodging (\$945) climbed slightly (from \$899 reported by 2024 visitors). Lodging expenditures have grown more slowly in the last two years after marked increases post-pandemic.
- Reported meal spending, at \$390, marked the greatest area of increased expenditure this year. Visitors from the 2024 survey reported spending \$303, showing a 28% reported increase.
- Other expenditure categories (shopping, entertainment, events, transportation) remained consistent from the prior year, with entertainment and events showing small increases.

Table 1 below depicts this year's reported average expenditure by category and total.

Table 1. 2025 Average Visitor Expenditure Profile

Expense Category	Expenditure
Lodging	\$945
Meals	\$390
Shopping	\$207
Entertainment	\$96
Attractions/Events	\$92
Transportation	\$116
Other	\$68
<i>Total Daily</i>	\$455
<i>Total Trip</i>	\$1,914

- Conversion measurement, representing the percentage of travelers who stated that the information or marketing materials reviewed either helped them decide to take an unplanned trip or reinforced potential plans to visit was 84%, slightly higher than the five-year average of 82%.

Visit Satisfaction Level

The survey included several new questions to gauge the overall satisfaction of 2025 visitors to the region. The results were overwhelmingly positive. This included 97.8% of respondents indicating that they would be "likely" to recommend a visit to the region and just under 99% of respondents indicating that they would like to return in the future. The survey asked if the trip met their budget expectations and 96% stated that it did.

ESTIMATED VISITORS and ROI

The 2025 estimated visitor count (as influenced by ROOST) multiplies the number of *traceable* leads generated by the agency (those who contacted their office during 2025 for information through all sources) by the conversion factor and by the average party size (determined by the survey).

306,696 (direct leads) x 84% (gross conversion factor) x 3.3 (average party size)

Estimated visitors in 2025= 850,161

The estimated number of travelers influenced by ROOST to visit the Adirondack region in 2025 is 850,000.

Return on investment

Researchers measured return on investment (ROI) by estimating expenditures generated by direct expenditures of travelers and divided that by the total marketing dollars spent by ROOST.

The first step in this process is to estimate the total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials. This calculation multiplies the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures, and length of stay:

216,713 (number of direct, traceable inquiries) x 84% (gross conversion factor)

x \$445 (mean traveler party expenditure per day) x 4.3 (mean length of stay in nights) = \$348,331,473 (total estimated revenue generated by travelers influenced by ROOST in 2025)

The second step in this process is to divide the total revenue generated by travelers by the marketing dollars spent by the total ROOST marketing budget:

\$348,331,473 (total estimated traveler revenue) / \$3,615,738 (total ROOST marketing expenditures)

Return on Investment (ROI) = 96:1

The above calculations show that the total estimated revenue generated by travelers influenced by ROOST was nearly \$350 million in 2025. This produces a conservatively-

estimated ROI of \$96 in leisure traveler-related revenue for every marketing dollar expended. This is substantially higher than the five-year average.

CONCLUSIONS

ROOST continues to lead destination marketing across this portion of the Adirondacks by growing assets, investing in authentic and unique recreational and event opportunities, and maximizing visitor opportunities and expenditures.

Average lodging expenditures reported by survey respondents grew modestly following post-pandemic years of marked increases. Travel trend data suggest that luxury hotels are strongest in market and that budget or moderate hotels are struggling in many cases to maintain ADRs. This may be due to a more highly segmented domestic market where more affluent travelers are spending more, while most middle- or lower-income travelers are highly affected by inflation and costs of living and spending less².

Reported meal spending by 2025 visitors increased from prior years. Food prices rose for the third year in a row and some types (such as eggs, chocolate, coffee) experienced percentage increases in the high double digits. At the same time, at least some of this increase is attributed to a growing “foodie” culture, particularly among younger visitors.

Visitors reported slightly increased spending on entertainment, events, and attractions from prior years. This is consistent with travel studies that document younger (particularly Gen Z) travelers who enjoy planning travel around events. Authentic experiences, tied to history, culture or entertainment are a growing trend for younger visitors². According to this research, “events are driving economic impact.” An example of this in the Adirondack region was the April 2025 solar eclipse which saw high visitation albeit for a brief period.

Sustainable practices and experiential, wellness-based experiences continue to be focus areas for travelers and growing markets overall³. Outdoor experiences continue to be important to most travelers through this survey. Given the rich recreational trail systems and protected lands, the region has exciting potential for all these growth areas.

ROOST has well-positioned its marketing to address the Adirondack region’s travel opportunities. Results from this assessment of 2025 organization marketing efforts demonstrate nearly record-setting impacts. Return on investment from 2025

marketing expenditures is estimated at 96:1, well above the five-year average. The shifts in reaching the visitor market These figures show growth in reaching visitors and continued highly positive revenue impacts.

An opportunity to increase visitation, recognized by ROOST, is to reach the Northeast's more diverse audiences. The region has invested in making its communities more welcoming to racially or ethnically diverse visitors although the visitation is notably still predominately racially homogenous. The region holds a Winter Pride festival that celebrates LGBTQ+ residents and visitors and has had growing participation. Further targeted marketing to other diverse audiences could provide real potential for growth.

Targeting events, given the generational interest in such communal gatherings, is another area of key opportunity. 2026 will see vast numbers of tourists visiting New York State for the FIFA World Cup. The region is promoting "watch parties" for the games and targeting international visitors to experience the Adirondacks. The region's rich history also presents a strong opportunity for 2026 visitation in celebration of the nation's 250th anniversary.

ROOST and the research team continue to discuss the broader impact of regional tourism on Adirondack regional visitor assets and areas by which to expand traveler data collection accordingly. The study at a regional level provides a benchmark in measuring ROI on marketing investments for the two-county region and the Villages of Tupper Lake and Saranac Lake in Franklin County. It enhances and improves evaluation of future marketing efforts, opportunities, and marketing channels for the coming years and beyond. Table 2 depicts 5- year key statistics.

TABLE 2. 5-YEAR SUMMARY TABLE OF KEY REGIONAL ROI DATA

	5-Year Average	2025	2024	2023	2022	2021
Completed Survey Responses for Adk Region	5,450	3,885	4,195	9,717	3,293	6,161
Mean Respondent Income	\$109,200	\$118,000	\$112,000	\$110,000	\$105,000	\$101,000
Mean Age of Respondents	58	59	58	58	58	58
Direct Inquiries to ROOST for Region	217,610	216,713	215,140	228,324	215,944	211,930
Average Night Stays/Party	3.8 Nights	4.3 Nights	4.1 Nights	3.6 Nights	3.7 Nights	3.4 Nights
Average Party Size	3.4 Persons	3.3 Persons	3.2 Persons	3.2 Persons	3.4 Persons	3.7 Persons
Conversion Factor Rate	83%	84%	82%	85%	82%	80%
Average Daily Expenditure per Party	\$450	\$445	\$435	\$491	\$459	\$421

Average Total Expenditure per Party per Trip	\$1,708	\$1,914	\$1,769	\$1,768	\$1,697	\$1,390
Marketing Budget	\$3,485,547	\$3,615,738	\$3,760,887	\$3,630,220	\$3,188,710	\$3,232,178
ROI	88:1	96:1	84:1	91:1	94:1	75:1

SOURCES CITED

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