VISITOR STUDY AND MARKETING ANALYSIS

2025 VISITOR PROFILE

Essex County, New York

Photo credit: ROOST ADK

Regional Office of Sustainable Tourism (ROOST)

PlaceMaking

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INTRODUCTION

In 2025, the Regional Office of Sustainable Tourism (ROOST) continued to manage marketing tourism assets for Essex County, New York. The agency commissioned a study to determine visitor information at the county level to gauge key regional marketing program statistics. This year's study is the 22nd year of ROOST and 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 travelers to the region. Visitors completed an online survey, via email, and the team compiled responses received specifically from visitors who spent most of their time in this portion of the Adirondack region.

This report provides a summary of regional visitor data and 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 a return on investment (ROI) for the region's marketing expenditures. ROOST measured a total of 197,908 traceable leads who expressed interest in visiting Essex County in 2025.

PlaceMaking also compiled similar research for the Adirondack region including Hamilton County and the Tupper Lake and Saranac Lake Regions, and for Hamilton County individually. Accompanying research includes a more in-depth look at day visitors and those who stayed in short-term rentals during their visit and for sustainability interest and preferences, under separate covers.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the fourteenth year. The study has employed a similar methodology with comparable results for more than 20 years. PlaceMaking and ROOST collaboratively designed the survey instrument to gather information from its leisure travelers and to measure regionally the return on investment in marketing expenditures.

The survey is segmented by county level data where the visitor indicated spending the most time; this sub-group analysis forms the basis for this report. 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 multiple applications over time.

The survey was distributed electronically by ROOST to a sample of its database of visitors or parties inquiring about visitation to Essex County during 2025. ROOST collects the data quarterly during the year within the month following each travel quarter and delivered electronically to a sample of visitors who had inquired about traveling during that period. This method of collection allows slight survey modification by seasonal activities and to help maximize trip data recollection soon following actual dates of travel.

Those invited to participate in the survey represent traceable direct inquiries generated by ROOST's marketing efforts. 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 identify and track as unique respondents. This study does not take into consideration that the potentially large group of individuals who view travel materials via websites, etc., 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 through validity checks over the two decades of employment. The online survey provides Adirondack-related incentives to randomly selected respondents for survey completion.

ROOST successfully sent nearly 200,000 survey invitations and received 19,800 responses tabulated as valid responses. The results are an approximately 9.9% response rate. Researchers are satisfied with this strong response. Survey data are next broken down by county of visitation. Results appear consistent in comparison to many years of data collection and external data review.

The project team for this research is the same as previous years of 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. Data management is carried out by PlaceMaking contractual assistance.

VISITOR DATA SUMMARY

Highlights of 2025 visitation to Essex County from all survey respondents include:
Demographics and Visit Information

- The average visitor party age of respondents was 58 years old and respondents included 53.1% female, 45.6% male, and 0.3% gender non-binary/other.

- Survey respondents' mean annual household income is $117,000, which is slightly higher than last year, which was $115,500.

- The average reported total traveler party size was 2.6 adults and 0.6 children for a total average of 3.2. This is consistent with party size data from the last several years.

- Visitors continue to report predominantly White race (93%). Two percent each report mixed race or Hispanic ethnicity. One percent each report Asian/Pacific Islander, American Indian and Black/African American race.

- Sixty-eight percent (68%) of visitors reported that they were New York state residents, which is slightly lower than reported in the prior year but closer to that reported in the several years before that.

- Of New York state visitors, Northern New York and the Capital District continue to be the most frequent home region of visitors from this group at 35%, followed by central New York visitors at 21%, western NY visitors at 12% and downstate/NY metro at 12%. A greater proportion of visitors from central and western New York than in the prior year reported, marking the second consecutive year of increased survey respondents from these regions.

- Survey respondents reporting from Northeastern states outside of New York state declined slightly (from 25% to 23%) from the prior year.

- Reported Canadian visitation declined from 2024 to 2025 from 4% to 2% from Quebec and 3% to 2% from Ontario. These drops are not surprising given overall precipitously declining Canadian to U.S. travel in the last eighteen months.

- The average duration of stay reported by 2025 visitors was 4.1 nights, slightly longer than that reported by 2025 visitors (4.0) and continuing a gradual increase of stay length reporting over the last few years.

- July/August (26% of reported visits) and September/October (23% of reported visits) continue to be the most common seasons for visitation. Reported visitation by 2025 visitors during early summer showed a notable increase from the prior year (15% to 22%). This is primarily due to strong visits during the month of June. Reported visitation in early winter (November/December) declined from the prior year (from 14% to 9%) and January/February reported visitation increased from the prior year (11% to 14%).

- Hotels/motels remained the most reported lodging choice among 2025 visitor respondents by a high margin (45%), which increased slightly over the prior two years, but is consistent with a five-year average.

- Short-term rentals are the second-most common lodging choice used by 18% of respondents (up from 17% in prior year). Respondents who reported staying with family and friends declined slightly from prior year's reporting to 12% (from 15%). Reported camping/RV stays (12%) and second home accommodations (10%) remained consistent. Respondents reporting stays at bed and breakfasts (3%) remained consistent from prior years.

Interests

- The most reported draw to visit the region continued to be outdoor activities, with 65% of respondents selecting this reason for interest in visiting the area.

- "Relaxing, dining and shopping" remained the second-most expressed reason to visit the area, selected by 53% of respondents. Sightseeing (38%) and visiting Olympic sites (23%) rounded out the top four areas of expressed interest. Interest in Olympic sites grew from the prior year, likely influenced by the upcoming 2026 Winter Olympics.

- Twenty-one percent of respondents indicated interest in visiting family and friends. A new high (17%) of visitors indicated interest in visiting the area for events.

- Hiking remained by far the greatest outdoor activity of interest.

- Reported interest in canoeing or kayaking was the next most cited outdoor interest, followed by fishing, boating, skiing/snowboarding, birding, cross-country skiing/snowshoeing, golf, and mountain biking. These top "10" activities of interest have remained consistent across many years. Expressed interest in skiing/boarding increased in 2025 visitors and cross-country skiing/snow shoeing declined. This may be due in part to low natural snowfall during 2025.

- 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 at 33%), and 25% family hikes. Ten percent of these respondents indicated interest in 46er hikes.

- For the third year, those who responded with interest in arts and entertainment received a follow up question about specific interest areas. The strongest area of interest was live music, comprising 46% of responses (a large gain from prior year), followed by visiting art galleries (19%), live theater (17%), and art studios (9%).

Traveler Spending and Conversion

- The reported average daily visitor party spending in 2025 is $476 per day. This is slightly higher than the $459 daily level from the prior year.

- The total average estimated trip expenditure was $1,950, an overall 6% increase in reported spending by 2025 visitors compared to 2024 expenditures.

- Reported spending on lodging stayed nearly flat from the prior year at $950 total. Several discretionary spending areas showed notable increases from the prior year, including meals (up by 25%), shopping (up by 13%), entertainment (up by 8%), and events (up by 10%). Transportation costs were equal to the year prior and "other" expenditures declined slightly.

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

Table 1. 2025 Average Visitor Expenditure Profile

Lodging	$950
Meals	$390
Shopping	$226
Entertainment	$107
Attraction/events	$97
Transportation	$118
Other	$62
Total Daily	$476
Total Trip	$1,950

- Conversion measurement, the percentage of travelers who stated that the information or marketing viewed either helped them decide to take an unplanned trip or reinforced potential plans to visit, was 83%. This is consistent with the conversion average for the past five years.

Visit Satisfaction Level

The survey included for the second year several questions to gauge the overall satisfaction of 2025 visitors to Essex County. The results were again overwhelmingly positive. This included 98% of respondents indicating that they would be "likely" to recommend a visit to the region and 99.6% of respondents indicating that they would like to return in the future. Over 95% of visitors (95.5%) indicated that the trip met their budget expectations.

RETURN ON INVESTMENT ANALYSIS

Return on investment (ROI) is measured by estimated expenditures directly generated by visitors and divided by the total marketing dollars spent by ROOST in Essex County.

The first step in this process is to estimate total revenue generated by leisure visitors to the county, influenced by ROOST marketing materials, by multiplying the number of traceable inquiries by the average gross conversion rate, daily travel expenditure, and length of stay:

(197,908 of direct, traceable inquiries) x 83% (gross conversion factor) x $476 (traveler party expenditure per day) x 4.1 (mean length of stay in nights)

= $ (total estimated revenue $320,576,920 generated by travelers influenced by ROOST in 2025)

The second step in this process is to divide the total revenue generated by visitors by the marketing dollars spent on 2025 Essex County visitor marketing:

$320,576,920 (total estimated traveler revenue) / $3,284,441 ROOST Essex County marketing budget)

Return on Investment (ROI) = 98:1

The above calculations show that the total estimated revenue generated directly by visitors touched by ROOST was nearly $321 million. This produces a conservatively estimated ROI of $98 in leisure traveler-related revenue for each marketing budget dollar expenditure. It also does not include the visitors who do not provide traceable information after reviewing ROOST marketing materials and decide to visit later.

CONCLUSION

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.

Companion data for the survey provides additional insight into visitation trends. Smith Travel Research (STR)[1] is an international leader in producing lodging data. Some of the areas of measure are RevPAR (revenue per available room), which is a factor in both occupancy percentage and the average daily room rate. STR also measures the supply and demand of rooms available in the market.

Smith Travel Research (STR) data indicate a decline in RevPAR in 2025, driven primarily by a significant increase in room supply rather than demand growth. On a trailing twelve-month basis, supply increased by approximately 10.1% year-over-year, while demand declined slightly by 1.7%. As a result, occupancy fell from 53.8% in 2024 to 48.0% in 2025 (–10.7%), while average daily rates (ADR) remained relatively flat (–0.7%). This combination of increased supply and softening occupancy levels resulted in a decline in RevPAR of approximately 11.4%, indicating a more competitive lodging environment following the post-pandemic recovery period.

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 negatively impacted by inflation and costs of living and spending less[2.]

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 who are highly interested in food and beverage experiences at higher cost.

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 visitors[2]. 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 for an albeit brief period.

Sustainable practices and experiential wellness-based experiences continue to be focus areas for travelers and growing markets overall[3]. Outdoor experiences continue to be important to many travelers as indicated 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 Essex County travel opportunities. The year's return on investment (ROI) from marketing expenditures is 98$ per $1 invested to reach potential visitors; which is above the five-year average.

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 significant growth potential.

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 rich 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 Essex County. It enhances and improves evaluation of future marketing efforts, opportunities, and marketing channels for the coming years and beyond.

Table 2 below summarizes key Essex County traveler data ascertained by this survey during the last five years of data collection.

TABLE 2. KEY FACTS DERIVED FROM SURVEY DATA 5-YEAR COMPARISON

	5 Year Average	2025	2024	2023	2022	2021
Number of Completed Survey Responses (for area)	3,343	2,738	3,582	3,342	2,571	4,302
Mean Income of Respondents	$111,300	$117,000	$115,500	$115,000	$108,000	$101,000
Mean Age of Respondents	58	58	58	57	58	58
Respondent Gender	57.6% Female 42% Male 0.4% other	53.1% Female 45.6% Male 0.3% other	57.4% Female 42.2% Male 0.4% other	58% Female 42% Male	62% Female 38% Male	58% Female 42% Male
Direct Inquiries to Essex County via ROOST	199,223	197,908	195,018	207,484	197,268	198,439
Average Night Stays/Party	3.7 Nights	4.1 Nights	4.0 Nights	3.6 Nights	3.7 Nights	3.3 Nights
Average Party Size	3.2 Persons	3.2 Persons	3.1 Persons	3.2 Persons	3.3 Persons	3.3 Persons
Conversion Factor Rate	82%	83%	83%	82%	82%	80%
Average Daily Expenditure per Party	$489	$476	$459	$536	$512	$464
Average Total Expenditure per Party per Trip	$1,808	$1,950	$1,834	$1,878	$1,895	$1,484
Marketing Budget	$3,042,271	$3,284,441	$3,545,887	$2,993,635	$2,750,993	$2,636,397
ROI	93:1	98:1	83:1	93:1	102:1	88:1

SOURCES CITED

1. Smith Travel Research, Inc. - “Trend Report Essex County NY”. 2025.

2. 2025 Travel Trends - The Points Guy (1/2025)

3. “The 7 travel and hospitality trends that defined 2025”- Hospitality Net Hanley, Joseph. 12/15/25.

4. Travel Forecast 2025-2026| U.S. Travel Association (10/30/25)