

VISITOR STUDY:

2025 PROFILE

Hamilton County, New York

Regional Office of Sustainable Tourism (ROOST)

ROOST



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PlaceMaking
Growing North Country Communities and Economies

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INTRODUCTION

The Regional Office of Sustainable Tourism (ROOST) commissioned this study for the ninth consecutive year 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 targeted the leisure visitor market and excluded the group and business market segments.

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 2025 visitors to Hamilton County. Visitors completed an online survey, via email, and the results were compiled from visitors who indicated spending the majority of their time in Hamilton County.

The end-product of this research includes detailed visitor information, estimated traveler expenditures, and conversion rate analysis. PlaceMaking also conducted similar research for neighboring Essex County and for the cumulative Hamilton and Essex County, and the villages of Saranac Lake and Tupper Lake. These reports are available under separate covers.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey, using similar methodology with comparable results for more than 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 in marketing expenditures. As ROOST represents the tourism marketing interest for numerous Adirondack communities, the survey of 2025 travelers also included adjacent Essex County. Traveler studies for the two-county region, as well as the Saranac Lake and Tupper Lake Regions.

The research team segmented 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 sample of visitors inquiring about travel to Hamilton County during 2025. ROOST collected surveys quarterly throughout 2025, within the month following each travel quarter from a sample of visitors who had inquired about travel during that period. Surveys were modified slightly by seasonal activities.

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 websites, by telephone, through social media outlets (Twitter, Facebook, Instagram, and YouTube), printed materials, and in-person visits. This study does not consider the potentially large group of individuals who view travel materials and are then subsequently influenced to travel to the area but does 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 provided unique Adirondack-related incentives to randomly selected respondents for survey completion.

ROOST sent approximately 300,000 invitations for the regional survey and received more than 21,000 responses. This results in an approximately 7% response rate. The researchers are satisfied with this response level.

The project team for this research is the same as 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.

VISITOR SURVEY SUMMARY

Highlights of 2025 visitation to the region from among all survey respondents included:

Demographics and Visit Information

- Average respondent age was 63 years old, slightly older than reported in the prior year (61) and from 2023 visitors (59).
- Respondents included 52.8% female, 47% males, and 0.2% non-binary/other.

- The mean income of respondents was \$105,500, slightly higher than reported in the prior year (\$103,600).
- The average visitor party size among 2025 visitor respondents was 2.8 adults and 0.7 children, or 3.5 overall. This is slightly lower than the average reported party size of the five-year average.
- Visitation by respondents from New York state stayed consistent with the last several years at 77% of respondents.
- Of New York state visitors, 33% reported coming from northern New York counties, 21% from central New York state, 13% from western New York state. Eight percent (8%) reported from downstate New York and New York City/metro area.
- Northeastern state visitors from outside of New York dropped just slightly from the prior year to 21% of respondents. Reported visitation from other U.S. regions was 5% (up from 4% in prior year), with 2% each from the southern and western U.S. Less than 1% of respondents reported from Canada, consistent to the prior year.
- The average stay length reported by 2025 travelers was 5 nights, higher than the prior year (4.6) and demonstrating a short-term trend of increased stay length over the last 3 years.
- Well over half of visitors reported visiting the area during July/August (30%) or September/October (22%). Twenty-three percent of visitors reported visiting during early summer (May/June), an increase from prior years and by heavy June visitation.
- Camping/RV continued to be the most reported lodging choice among visitors, increasing to 30%. Hotel/motel visitation was the second most cited accommodation choice at 20%.
- Eighteen percent (18%) and 14% of respondents, respectively, selected second home use and short-term rentals. Thirteen percent of respondents reported staying with family and friends.

Interests

- The most cited reason to visit the region continued to be outdoor activities, with 67% of respondents selecting this response. This is historically consistent throughout the data collection period.
- “Relaxing, dining, and shopping” remained the second most expressed reason to visit the area by 49% of respondents. Sightseeing (40%) and visiting friends (27%) rounded out the top four areas of interest and were consistent with past data.
- Eleven percent (11%) reported interest in heritage sites, 9% reported interest in arts and entertainment (an increase from recent years data) and 8% in events.
- Hiking continued to be the most popular cited activity among those who responded to interest in outdoor activities. Fishing, boating, birding, hunting, cycling, cross-country skiing and snow shoeing, and skiing/boarder rounding out the ten most reported outdoor activities of interest.
- A question regarding hiking preferences continues to indicate a strong preference in casual hiking, with the strongest interest expressed in day hikes, followed by leisure/ firm surface hiking, and family hikes. These data are historically consistent over the last five years.
- For the second year, respondents who expressed interest in arts and entertainment received a follow-up question as to what types of these activities were interesting. The most popular response was live music by more than half of these respondents (56%), galleries (39%), and art studios (20%). The respondents showing interest in arts and entertainment have increased in the last two years of the survey.

Traveler Spending and Conversion

- The average daily visitor party spending in 2025 declined slightly from prior year to \$309 (from \$314 in 2024). The total estimated average trip expenditure for 2025 visitors, however, was \$1,547, a 7% increase from the prior year.
- Reported spending on lodging increased slightly from the prior year to \$825 (from \$797).

- All other specific spending categories showed increases from the prior year, with the largest gains reported in meals and shopping.
- Conversion measurement, defined by the percentage 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 87%, a notable increase from the prior year (83% in 2024).

Table 1 below summarizes key Hamilton County traveler data ascertained by this survey during the last five years of data collection.

Table 1. 2025 Average Visitor Expenditure Profile

Expense Categories	Expenditures
Lodging	\$825
Meals	\$258
Shopping	\$160
Entertainment	\$61
Attractions/Events	\$66
Transportation	\$112
Other	\$65
<i>Total Daily</i>	\$309
<i>Total Trip</i>	\$1,547

Visitor Satisfaction

The survey included several questions to gauge the overall satisfaction of 2025 visitors to Hamilton County. The results were overwhelmingly positive. This included 99.5% (higher than the 97.9% in prior year) of respondents indicating that they would be “likely” to recommend a visit to the region. An amazing 100% of respondents replied that they would like to return to the region in the future. The survey asked visitors if the trip met their budget expectations and 98.6% stated that it did, with 2% stating that it did not.

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.

Higher-end properties have maintained stronger rate integrity, while midscale and budget segments have faced greater pricing sensitivity. Within this context, Hamilton County's lodging and visitor spending performance aligns with broader regional trends, where extended length of stay and sustained visitor interest have helped offset softer daily rate growth, supporting overall trip expenditure gains despite a more competitive operating environment.

Average lodging expenditures reported by survey respondents grew modestly. 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. Luxury/upscale properties are performing strongly according to SRT data and supported data through this survey.

All spending categories reported increases in estimated expenditures by Hamilton County respondent visitors from 2025. Meal and shopping 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. The notable increase in shopping expenditure is a strong indicator of an area which is a highly variable component of visitor travel. Increases across all other areas including entertainment, events, transportation, and "other" spending areas are also strong indicators of robust visitor impact.

Increased spending on entertainment, events and attractions 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 a strong factor in 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 Hamilton County's travel opportunities. An opportunity to grow 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 lacking in demographic diversity. 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. The region is promoting “watch parties” for FIFA games and the nation’s 250th anniversary.

ROOST and the research team continue to discuss the broader impact of regional tourism on Hamilton County regional visitor assets and areas by opportunities to expand traveler data collection accordingly. The study at a regional level provides a benchmark for measuring marketing investments for Hamilton County. It enhances and improves evaluation of future marketing efforts, opportunities, and marketing channels for the coming years and beyond. Table 2 displays 5-year key statistics below.

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

	5 Year Average	2025	2024	2023	2022	2021
Number of Completed Survey Responses	746	625	630	896	724	859
Mean Income of Respondents ¹	\$99,955	\$105,500	\$103,600	\$103,280	\$97,395	\$90,000
Mean Age of Respondents	60	63	61	59	59	59
Respondent Gender	58% Female 42% Male 0.2% other	52.8% Female 47% Male 0.2% other	55.1% Female 44.7% Male 0.2% other	59% Female 41% Male	62% Female 38% Male	61% Female 39% Male
Average Night Stays/Party	4.2 Nights	5 Nights	4.6 Nights	3.7 Nights	3.8 Nights	3.7 Nights
Average Party Size	3.6 Persons	3.5 Persons	3.4 Persons	3.5 Persons	3.6 Persons	3.8 Persons
Conversion Factor Rate	83%	87%	83%	82%	83%	80%
Average Daily Expenditure per Party	\$348	\$309	\$314	\$429	\$375	\$314
Average Total Expenditure per Party per Trip	\$1,433	\$1,547	\$1,444	\$1,590	\$1,425	\$1,162

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex and Hamilton Counties NY." 2025.
2. IPX 1031. "Travel Report- American's Top Travel Trends in 2024". January 2025.
3. Hilton, Inc. "Trends Report- What Millennial, Gen Z, Gen X and Baby Boomers Tell Us About the Year Ahead." December 2024.