Leisure Travel Study

Day-Tripper and Short-Term Renter Focus

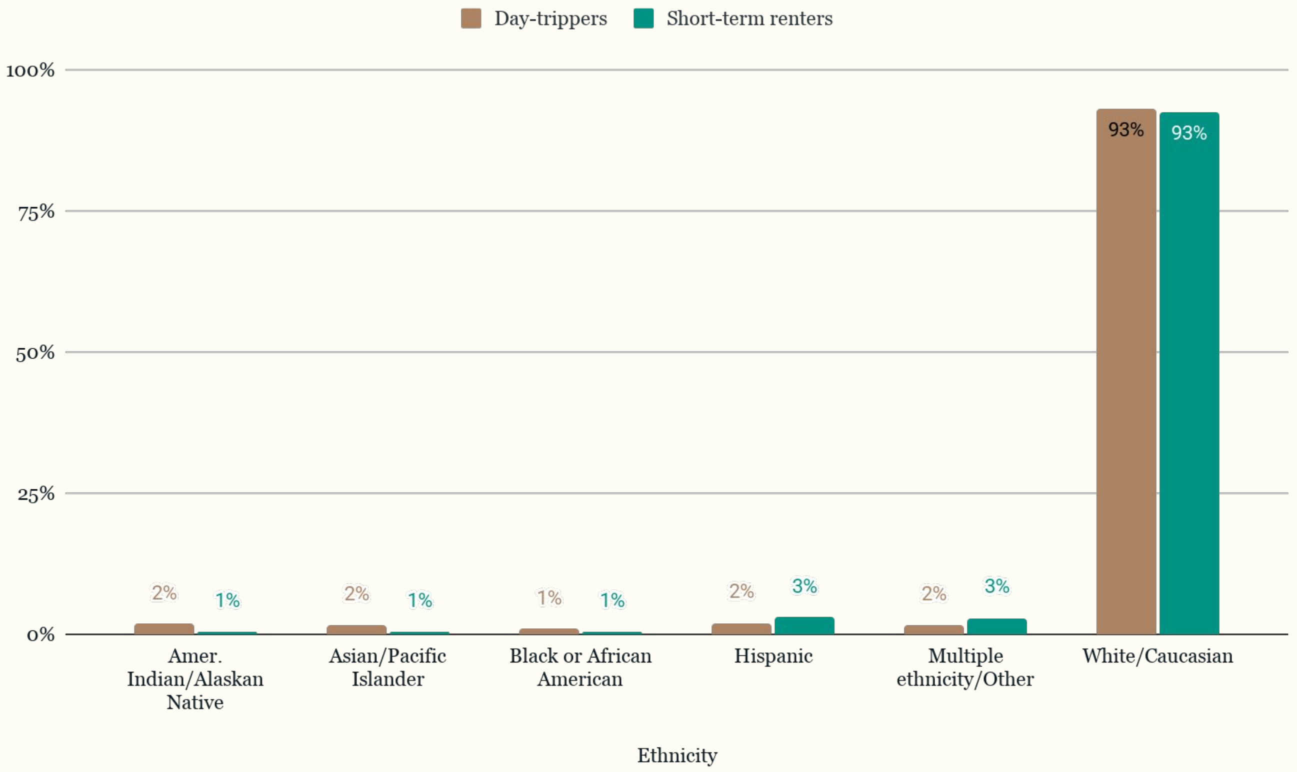
2025 COUNTY VISITOR PROFILES AND REGIONAL RETURN ON MARKETING INVESTMENT ANALYSIS

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 2025 leisure travelers to the region. This study marks 22 years of this visitor research. Visitors were requested, via email and other methods, to complete an online survey and the results were compiled from the responses received, specifically from visitors who spent most of their time in the region.
- 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.

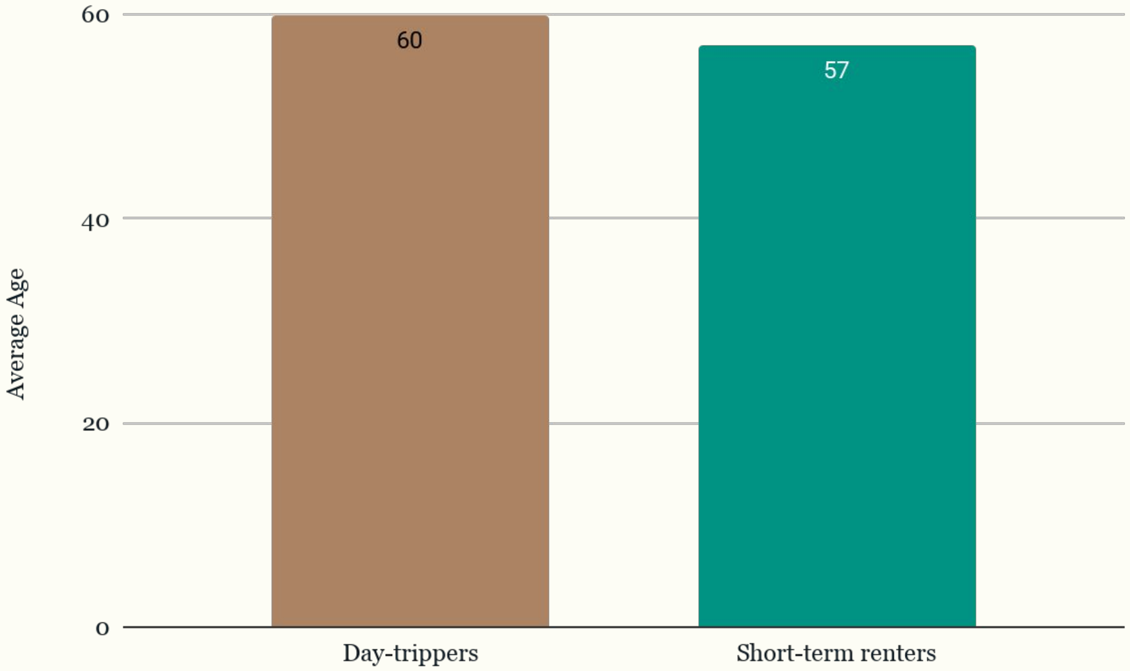
Ethnicity

Day-trippers / Short-term renters



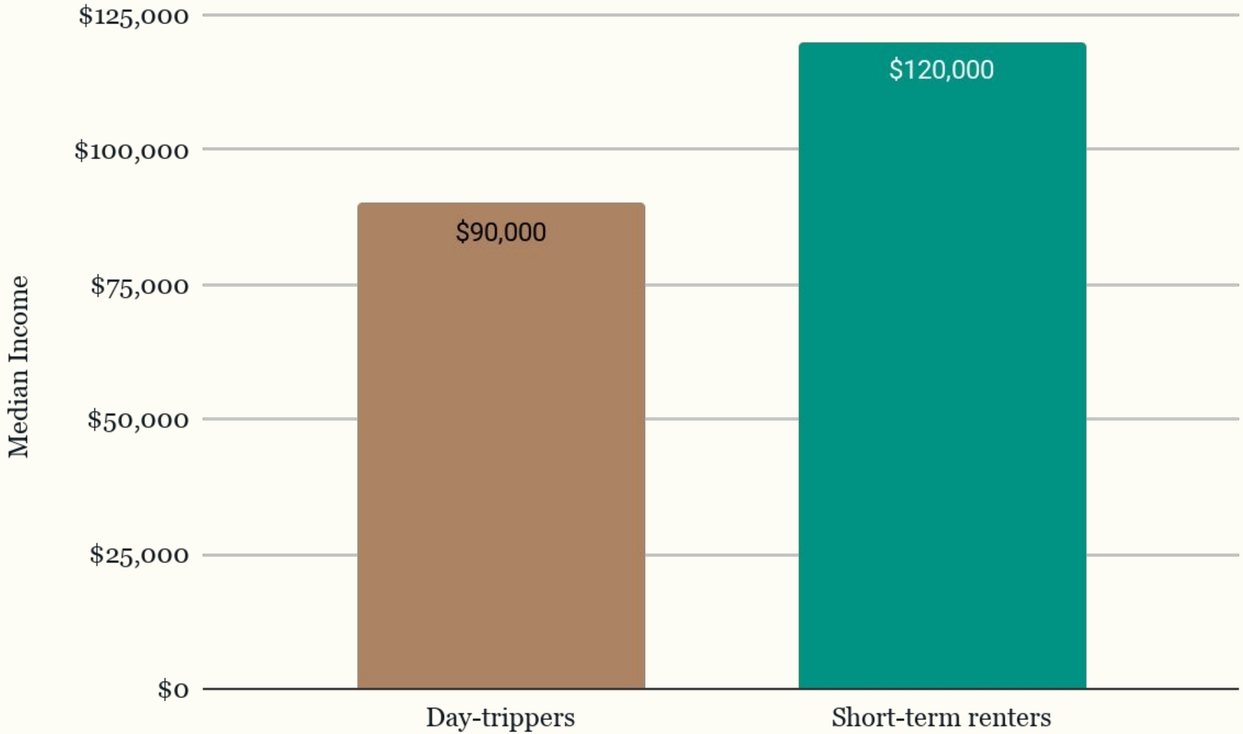
Average age

Day-trippers / Short-term renters



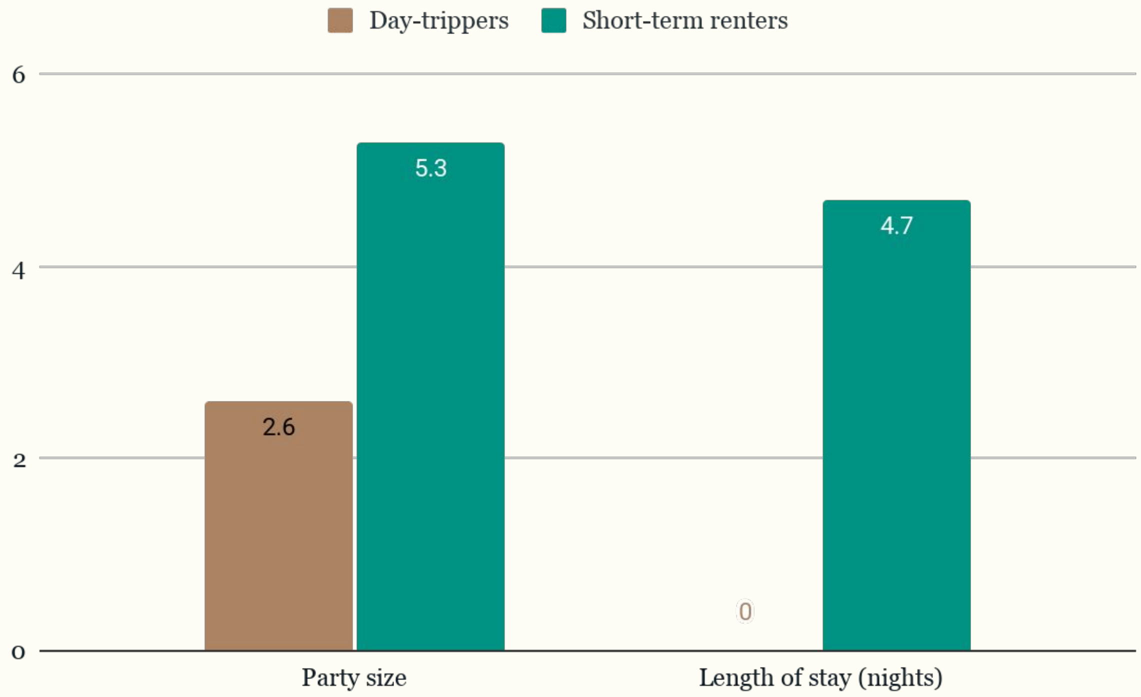
Median income

Day-trippers / Short-term renters

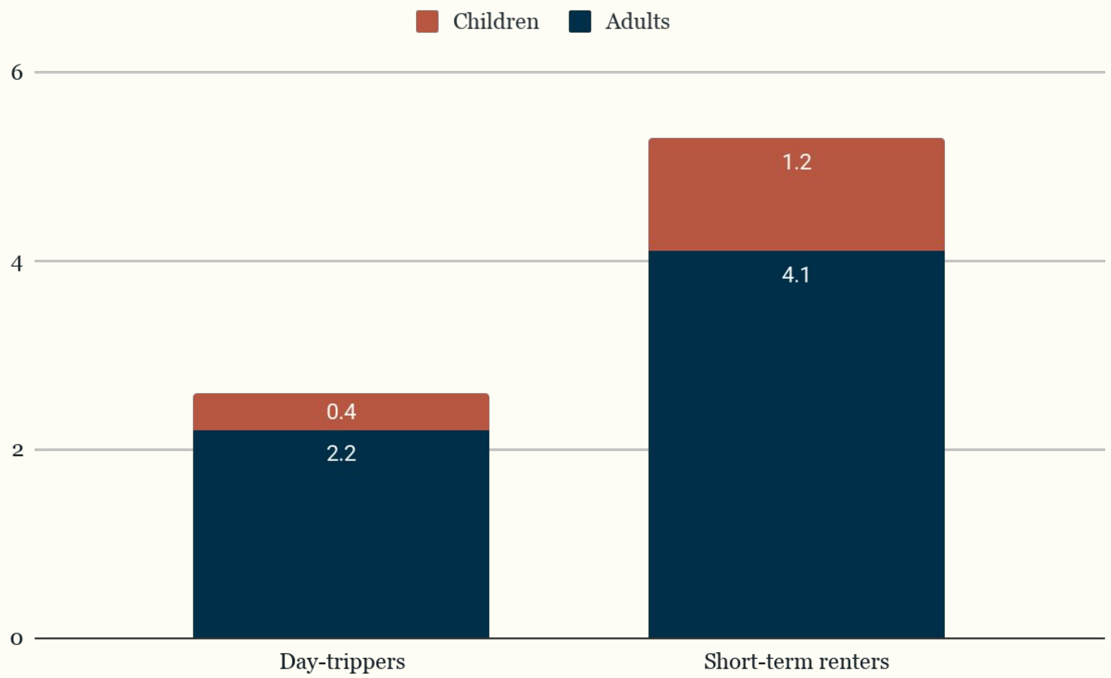


Party size / Length of stay

Day-trippers / Short-term renters

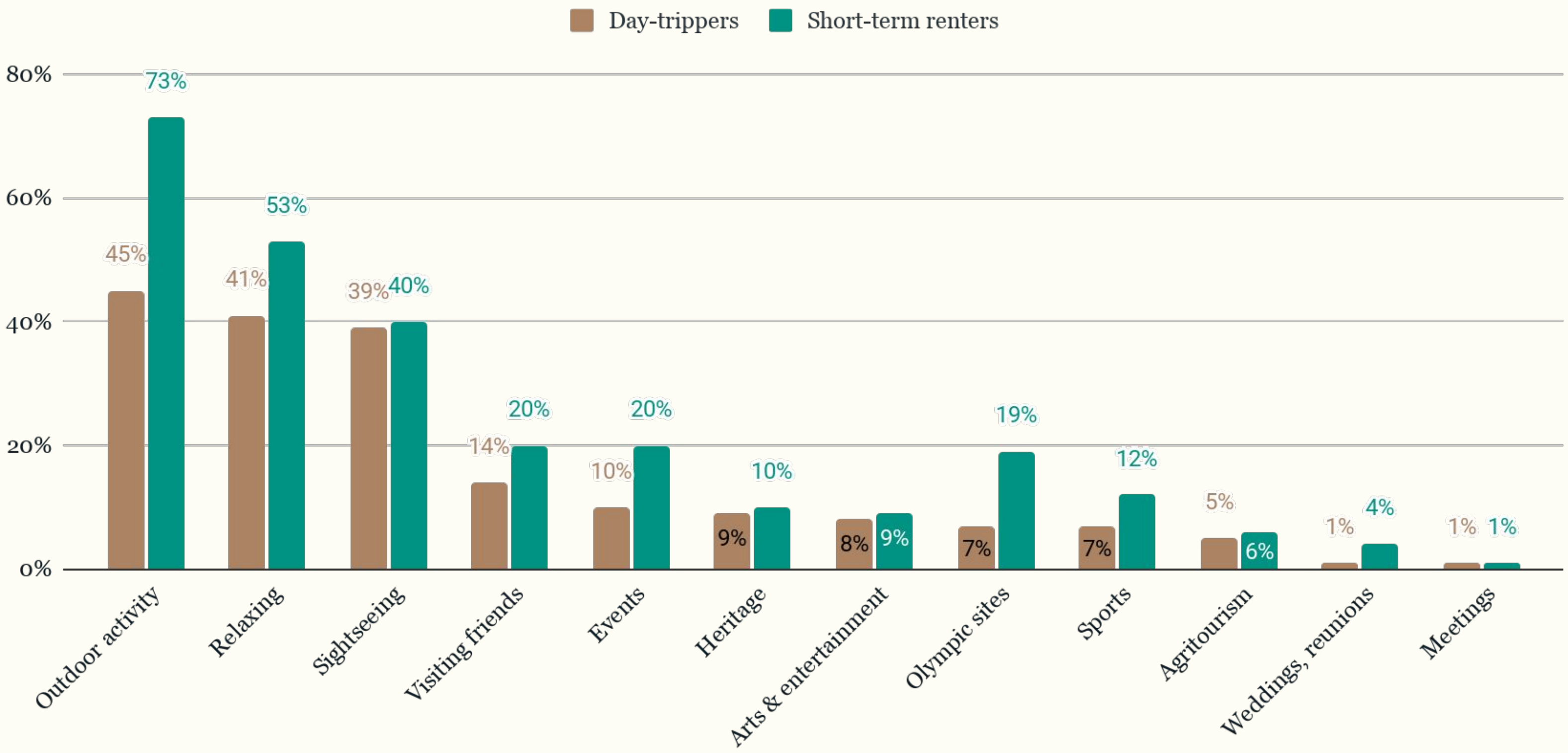


Party composition
Day-trippers / Short-term renters



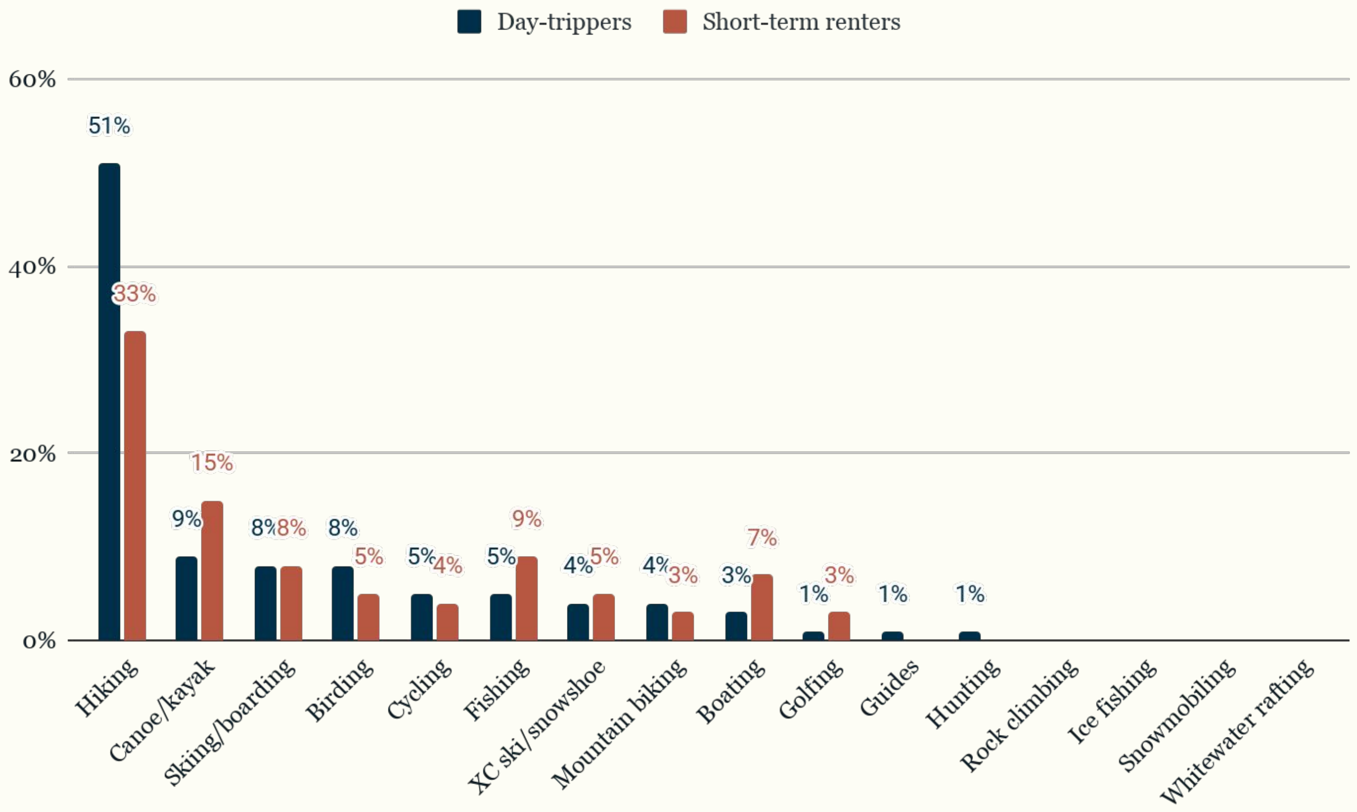
Key attractions

Day-trippers / Short-term renters



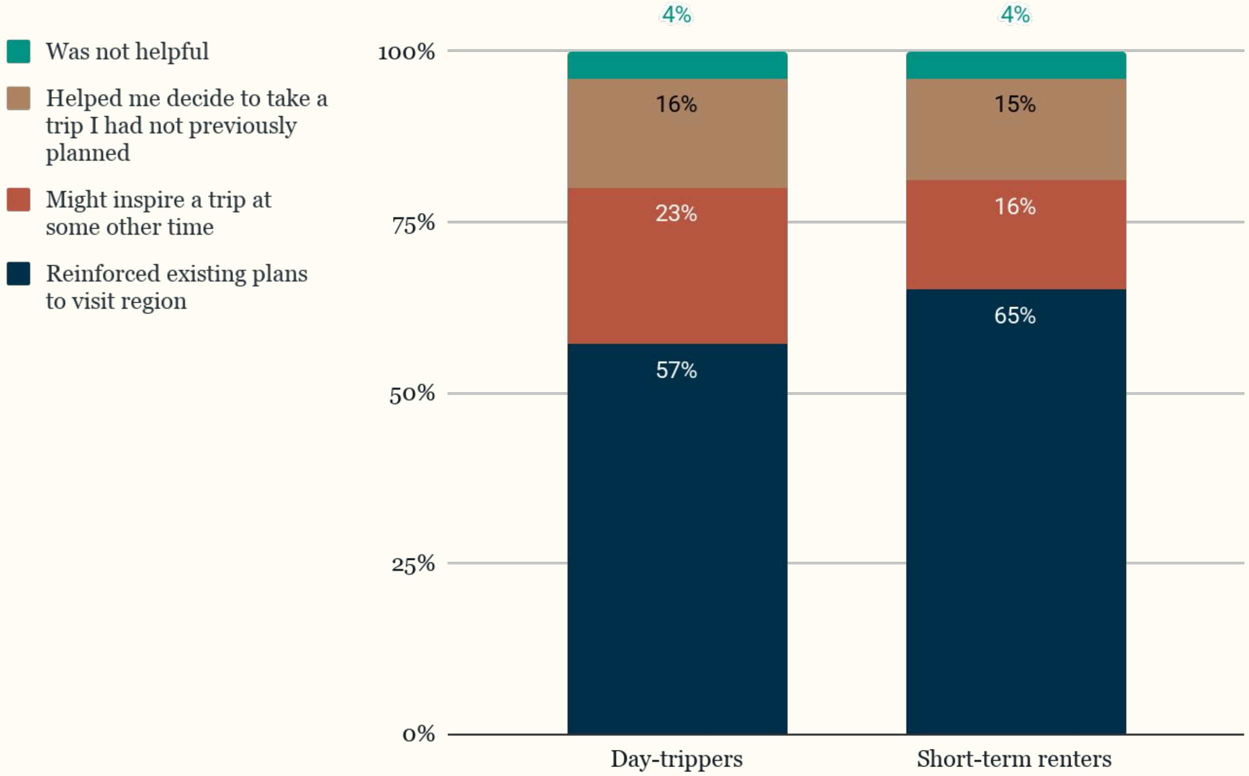
Outdoor activities

Day-trippers / Short-term renters



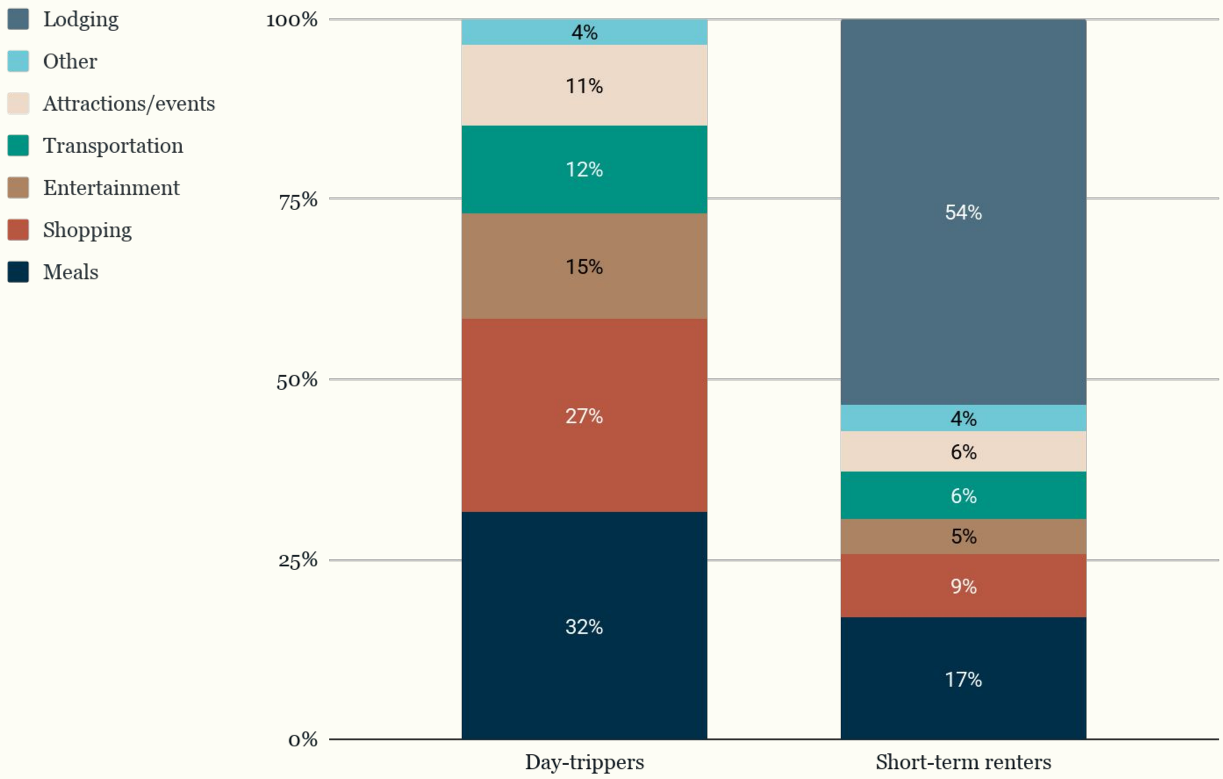
Conversion rate from viewing ROOST marketing materials

Day-trippers / Short-term renters



Total expenditure allocation by category

Day-trippers / Short-term renters



Day-Tripper Visitor Profile

Visitor profile

Day-trippers

- Day trip visitors, with a mean of 60 years old, are a slightly higher average age compared to the full visitor group (59).
- The mean reported income of day visitors is $100,100, notably lower than the $115,500 income of all regional visitors.
- Day visitors report summer (July/August) visitation as the most common season, followed by fall (September/October), but varying from the regional visitor group, more commonly in winter (December/January) than in early summer (May/June).
- The average day trip visitor party size is 2.6 people, including 2.2 adults and 0.4 children. Day visitors report a lower average party size than all regional visitors (at 2.7 adults and 0.6 children).

Visitor profile

Day trippers

- Overall visit expenditures, not surprisingly, are substantially lower among day trip visitors. The total average reported party expenditure for day travel is $279 compared to $445 daily expenditure by all visitors. The reported daily visitor spending by day visitors dropped from the prior year ($330).
- Although reported spending was lower on average, reported spending on meals increased, to $88 from $82 in prior year. However, all other categories declined.
- Most categories of day trip spending declined slightly. Reported entertainment expenditures exhibited the largest declines, falling to $43 from $81 in year prior.
- Outdoor activities (45%) are the strongest reported draws to visit the region by day-trippers, followed closely by relaxing, shopping and dining (41%), and sightseeing (39%). These areas of interest for years have been lower than the rate of interest for outdoor activities expressed by all regional visitors (66% of all regional visitors select outdoor activities as a draw).

Visitor profile

Day-trippers

- Fourteen percent of visitors expressed interest in visiting family and friends. Ten percent expressed interest in events, 9% in heritage sites, and 8% in arts/entertainment.
- Among day visitors who responded that they were interested in outdoor activities, the interest in hiking is by far the most popular, as is among regional visitors. However, the expressed interest level is far lower. Interest in canoeing/kayaking is the second largest outdoor activity draw, followed by skiing/boarding and birding. Each of these latter two categories show higher interest levels than by the full group of regional travelers.

Short-Term Renter Visitor Profile

Visitor profile

Short-term renters

- The mean age of short-term renters is slightly younger than the full regional respondent group at 57 years (versus 59).
- The average mean income reported by short-term rental-staying visitors is $124,700, notably higher than the $115,500 reported by the regional visitor group.
- The average short-term renter visitor party size is substantially larger at 5.3 people (4.1 adults and 1.2 children) versus 3.3 for all visitors to the region (2.7 adults and 0.6 children). Visitor party size, particularly adult count, has increased year by year for the past four years of the survey.
- The reported average length of stay for short-term renters is 4.7 nights, just below last year's reported average stay and the 5-year average of 4.8 nights. This is well above the average reported length of stay for regional visitors of 3.8 nights on average over the past five years.

Visitor profile

Short-term renters

- Total expenditures reported among short-term renters were an average of $2,935, 5% above the total reported for the prior year. This represents the first increase in four years (post-pandemic) for this group's reported travel expenditures.
- Reported lodging costs increased slightly from the prior year to $1,570. Visitors reported average meal costs at $495, an increase over $440, or an 11% increase from the year prior.
- Reported shopping expenditures by visitors declined among 2025 visitor respondents (from $341 to $285). Expenditures reported by short term renters in events and entertainment rose from the prior year, from $124 to $166 and $123 to $133, respectively. Reported "other" expenditures declined somewhat from the prior year.

Visitor profile

Short-term renters

- Reported interest in outdoor activities (at 73%) by those staying in short-term rentals is higher consistently across recent years than among all visitors. Interest in relaxing/dining (at 53%) is also higher than among all respondents. Sightseeing was the next most reported interest (at 40%), however similar in rate of the full group.
- One out of five (20%) of short-term rental respondents state that visiting friends and family was a drive to visit, while closer to one out of four indicate this interest among the full respondent group.
- Hiking, canoeing/kayaking, fishing, skiing/boarding, and boating are the most reported outdoor attractions by short-term renters. Each of these areas reports higher interest than among outdoor interests reported by the full regional visitor group. Areas of less reported interest than among all regional visitors include birding and cross-country skiing/snowshoeing.