



Leisure Travel Study

Essex County

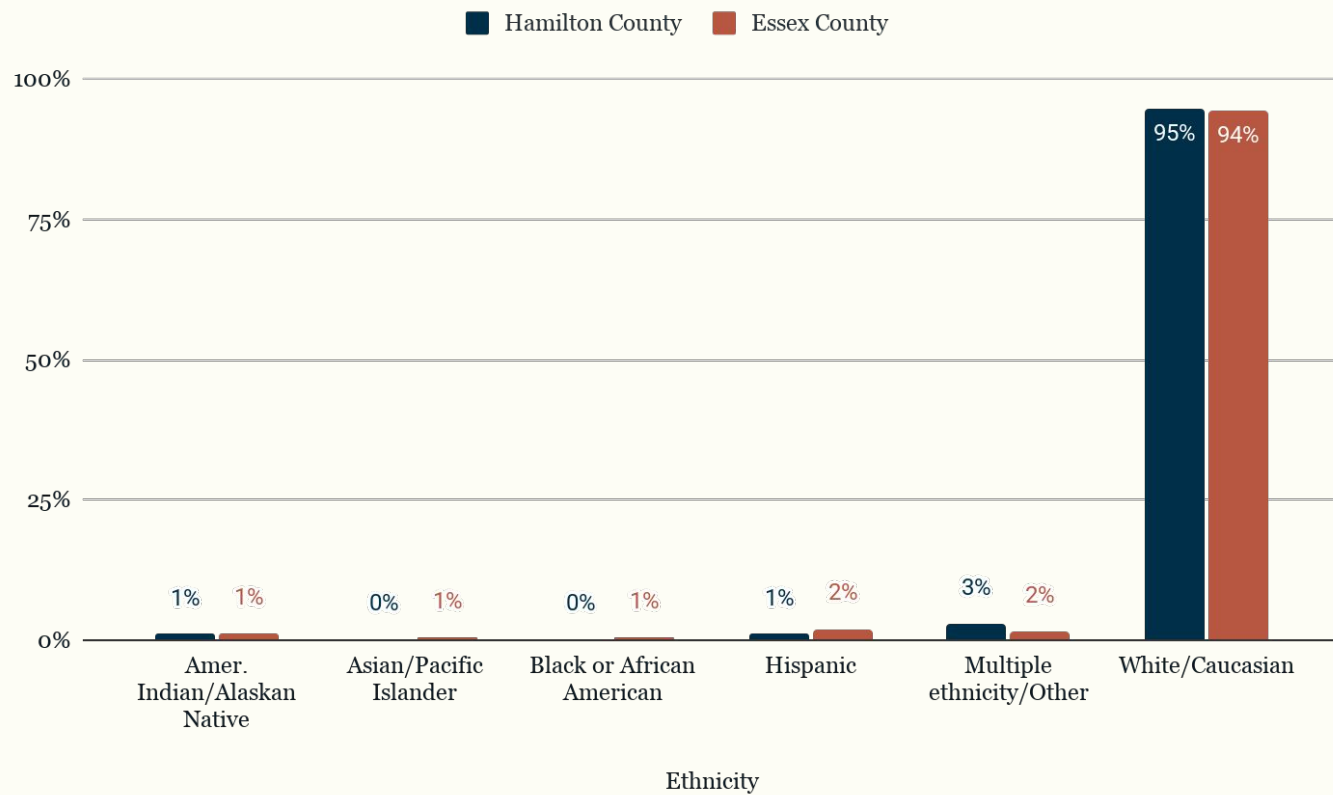
2025 COUNTY VISITOR PROFILES AND REGIONAL
RETURN ON MARKETING INVESTMENT ANALYSIS

ROOST

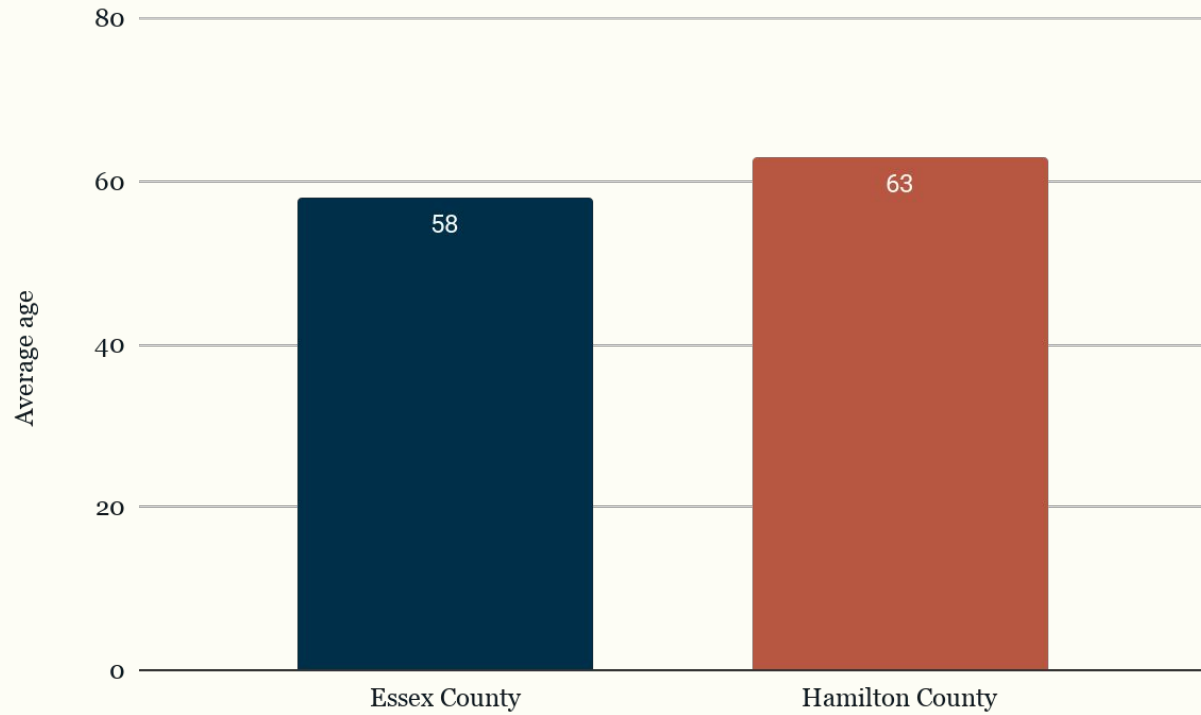
Project background and methodology

- 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 to complete an online survey, via email and other methods, and the results were compiled from the responses received, specifically from visitors who spent most of their time in the region.
- 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 197,908 traceable leads who were interested in visiting the region in 2025. PlaceMaking also compiled similar research for Hamilton County and the broader region that includes Essex and Hamilton counties, as well as the villages of Tupper Lake and Saranac Lake in Franklin County. These are available under separate covers.
- 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

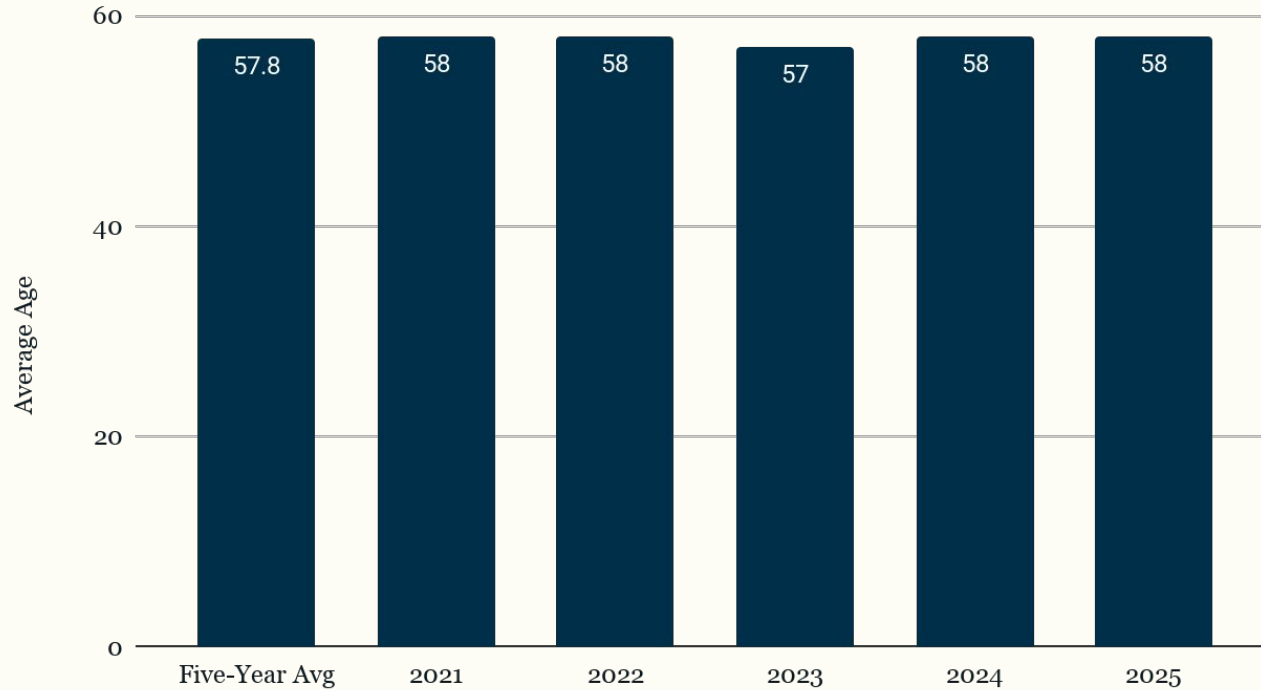


Average age

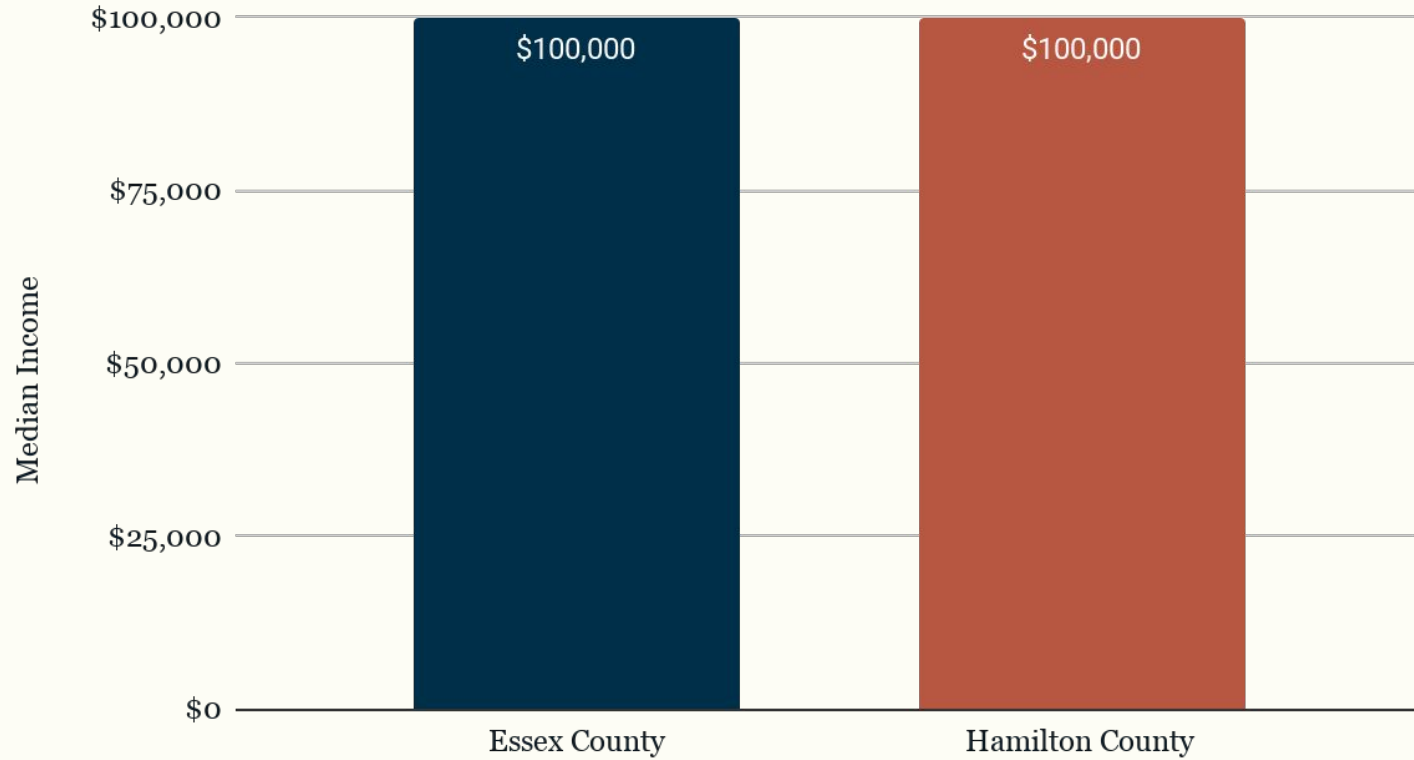


Five-year average age

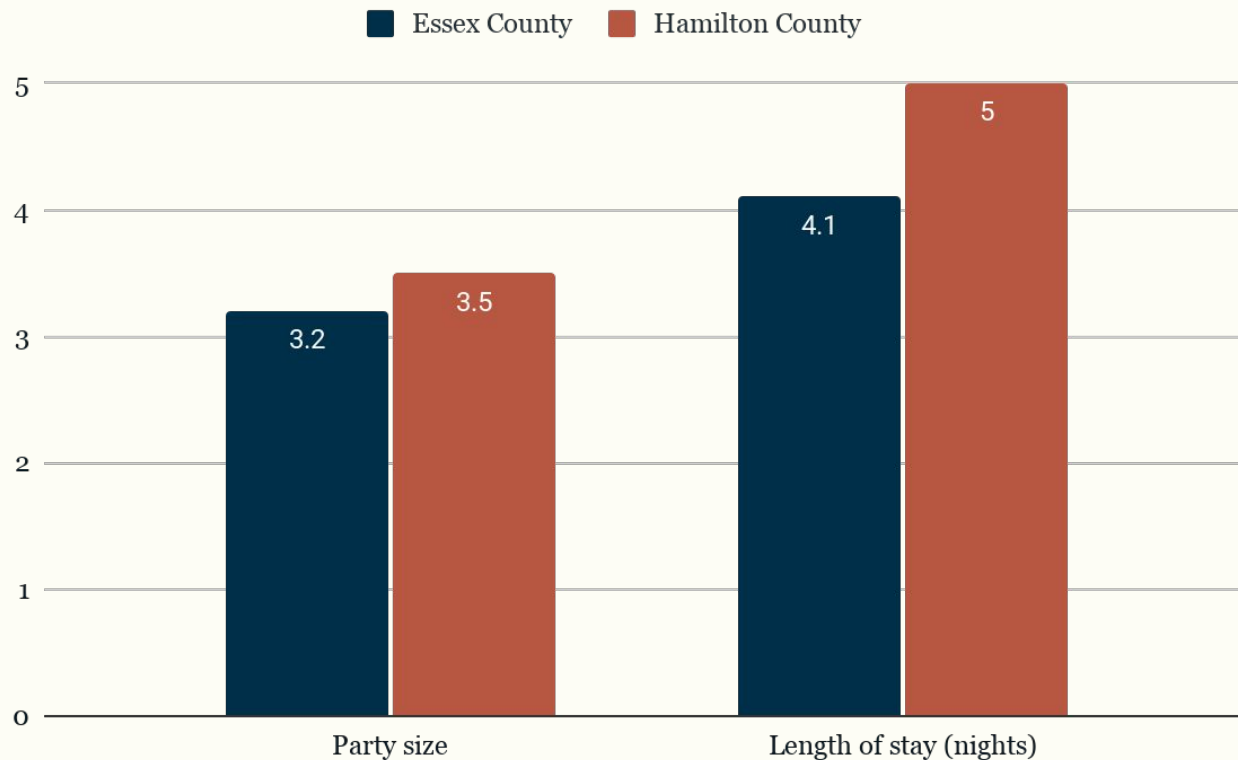
Essex County



Median income

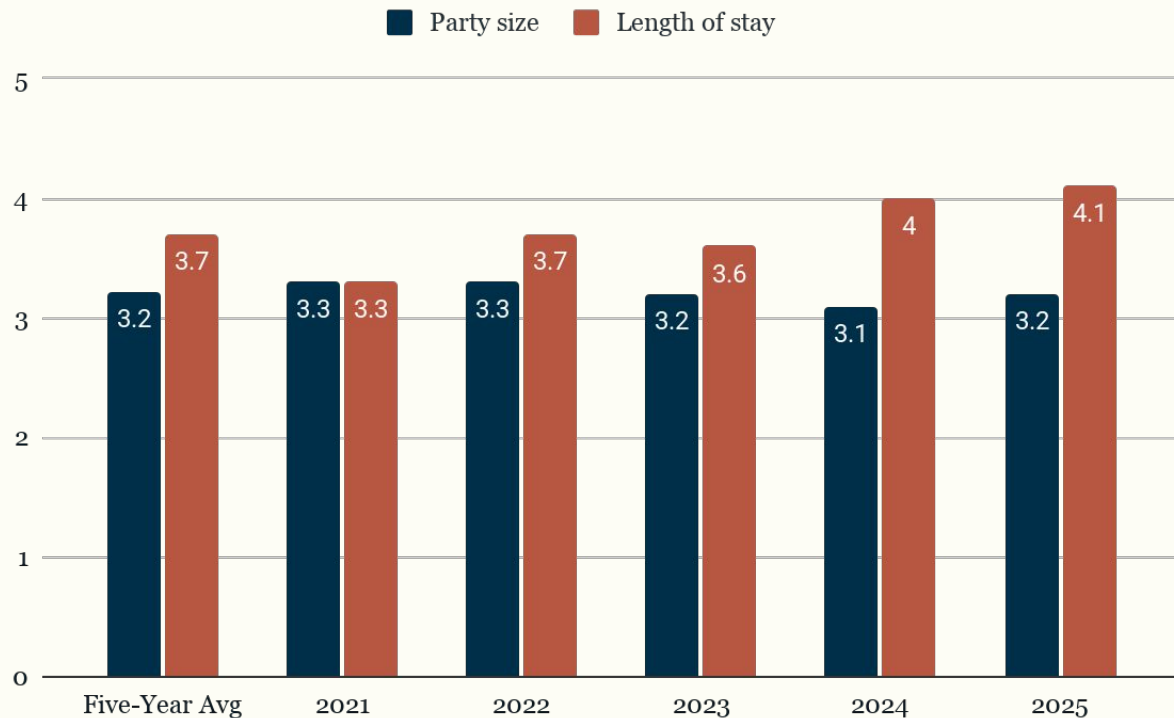


Party size / Length of stay

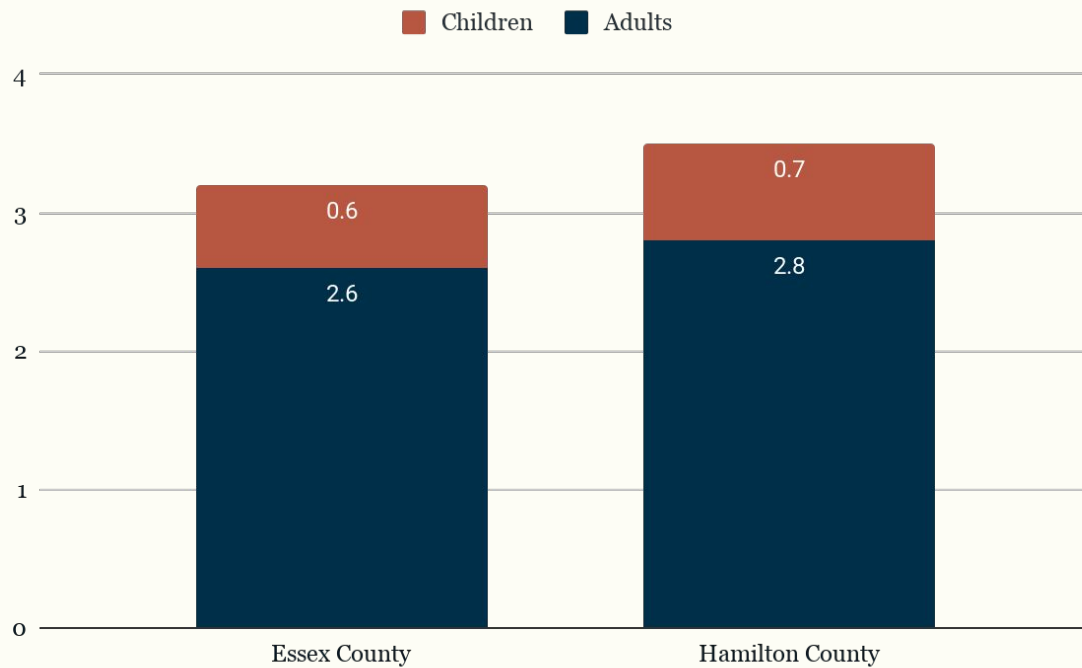


Five-year average party size / Length of stay

Essex County

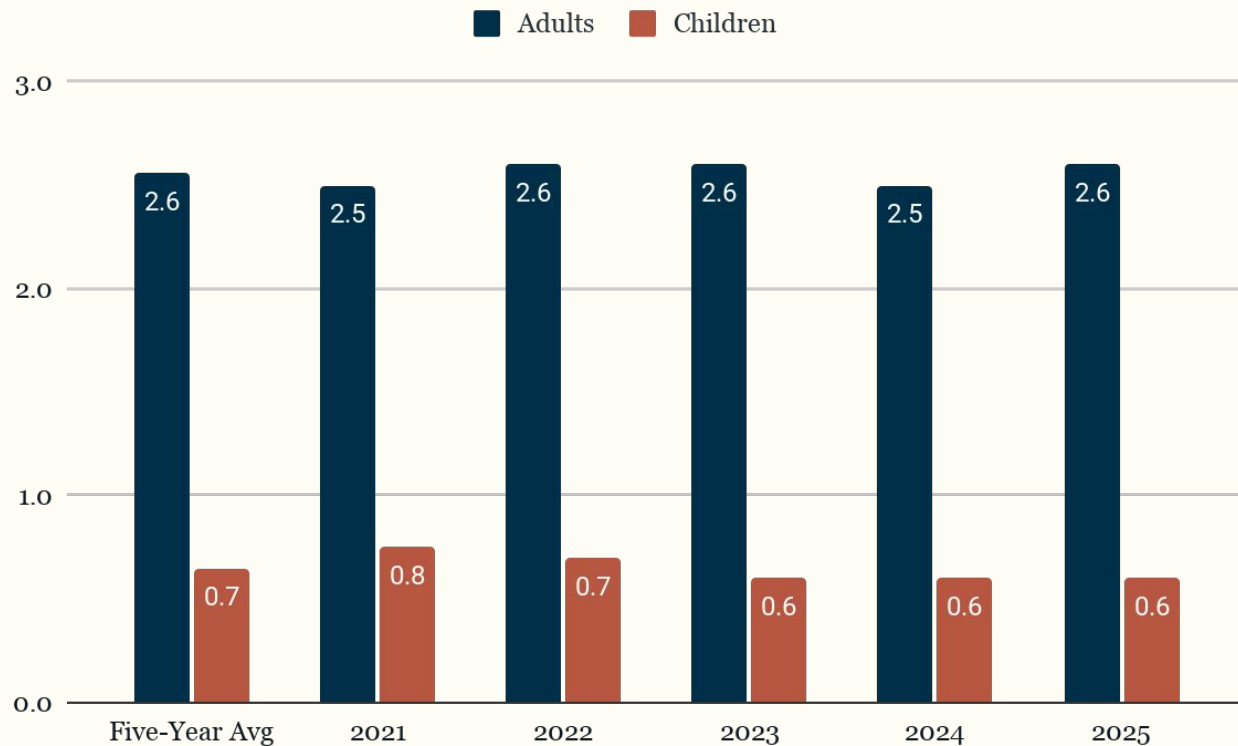


Party composition

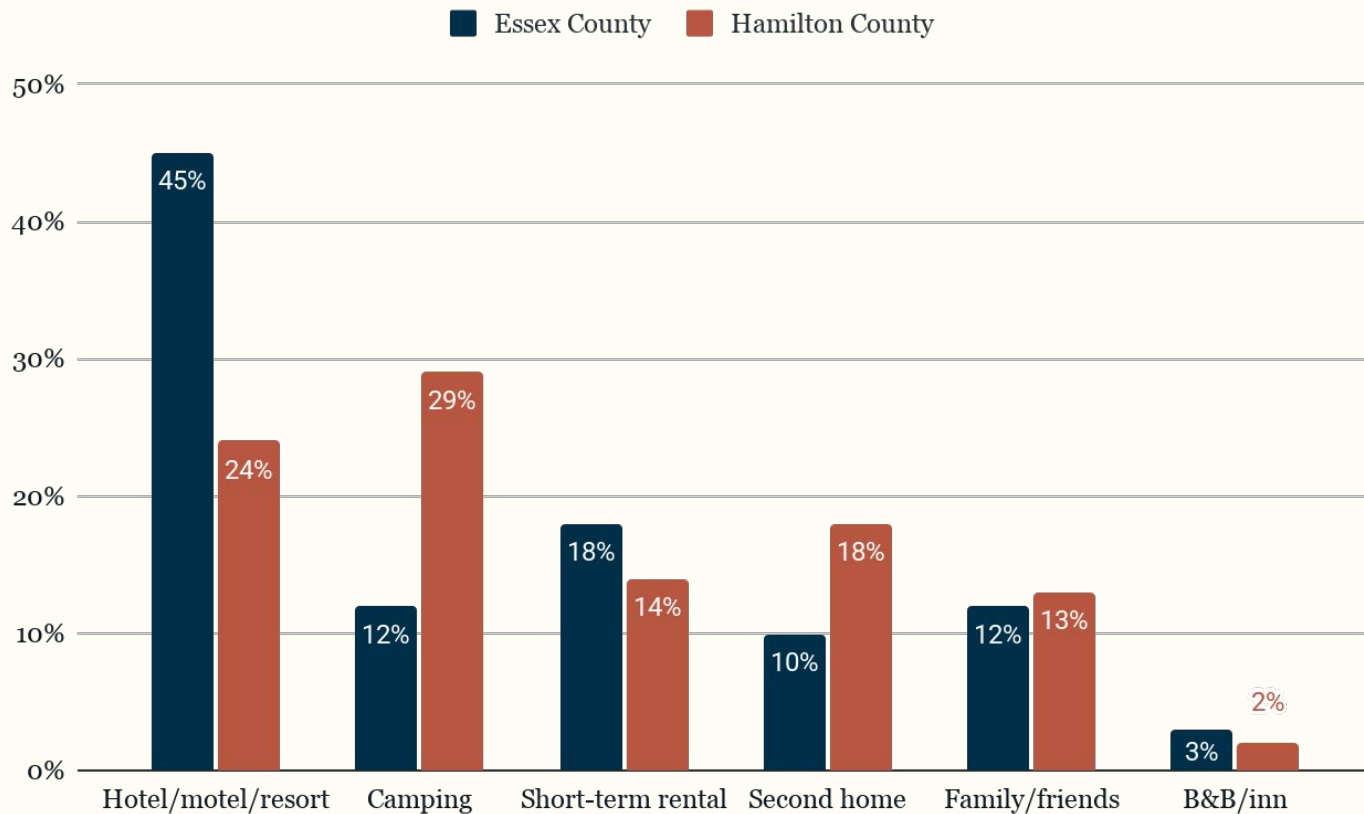


Five-year average party composition

Essex County



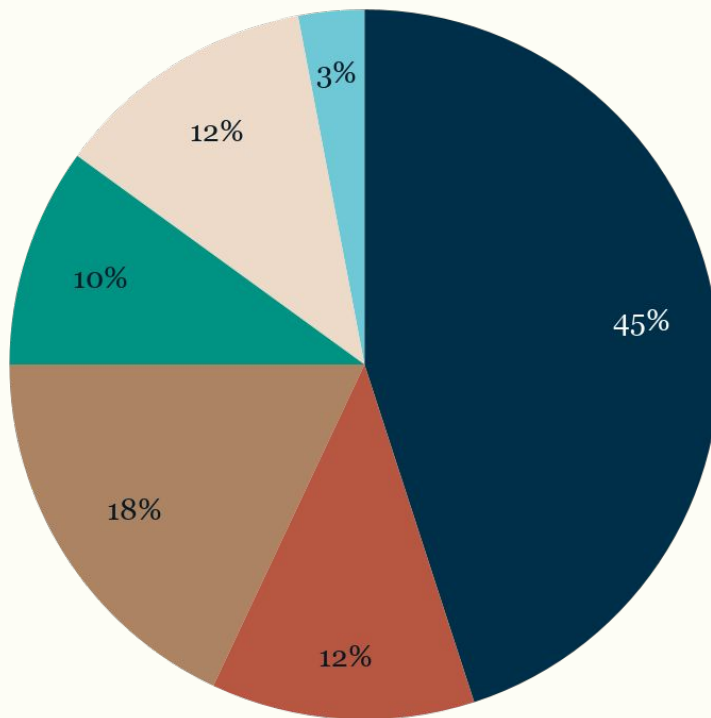
Lodging accommodations



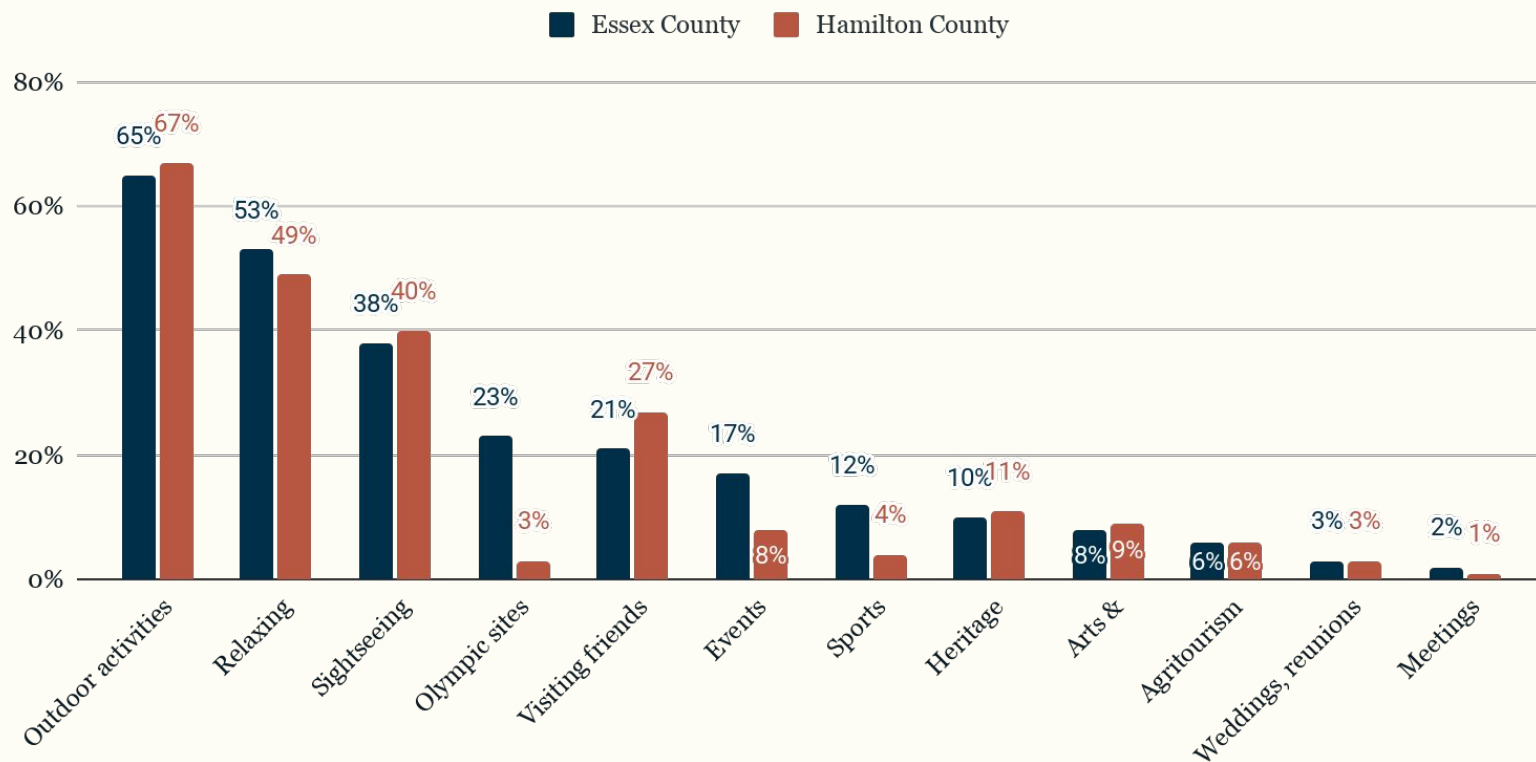
Lodging accommodations

Essex County

- Hotel/motel/resort
- Camping
- Short-term rental
- Second home
- Family/friends
- B&B/inn

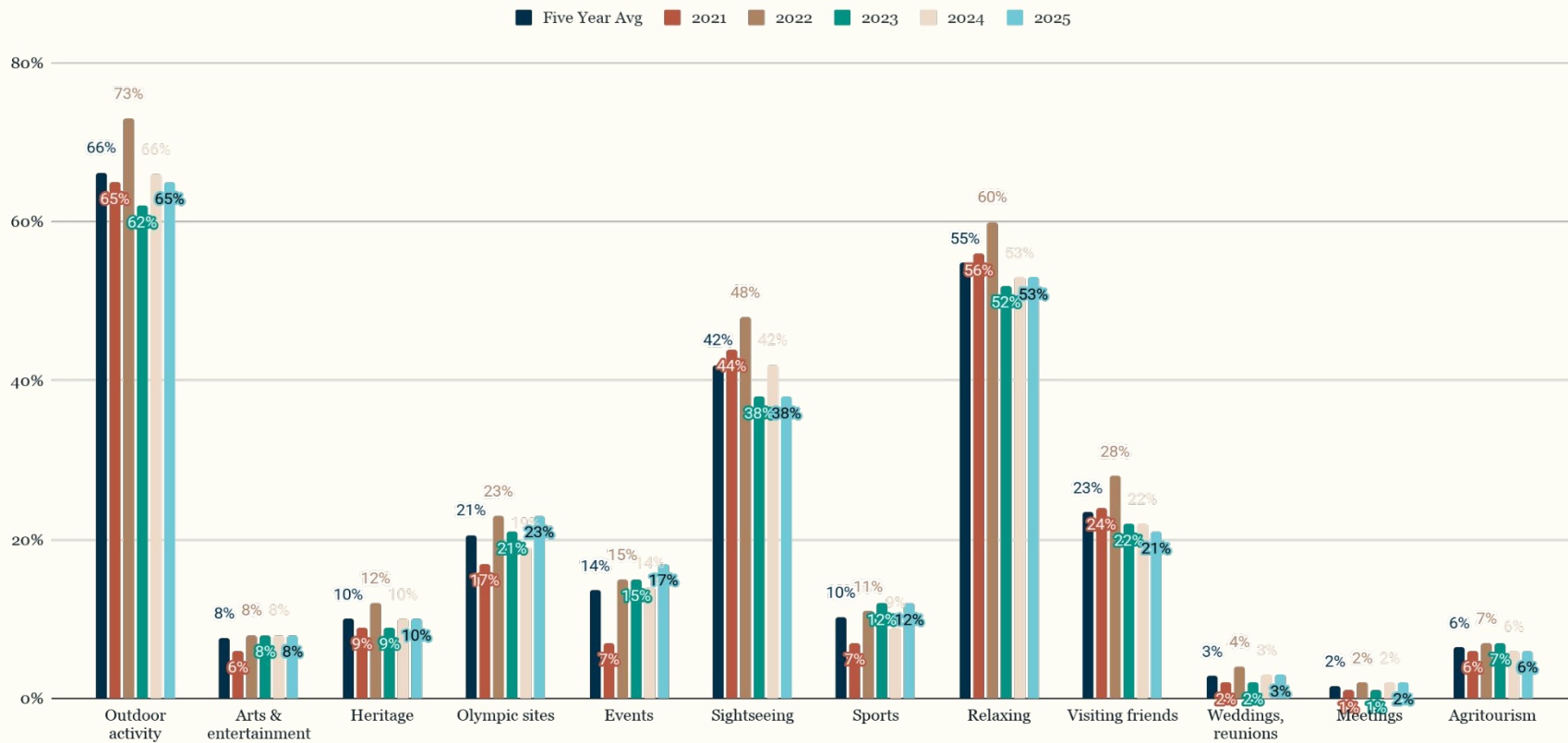


Key attractions

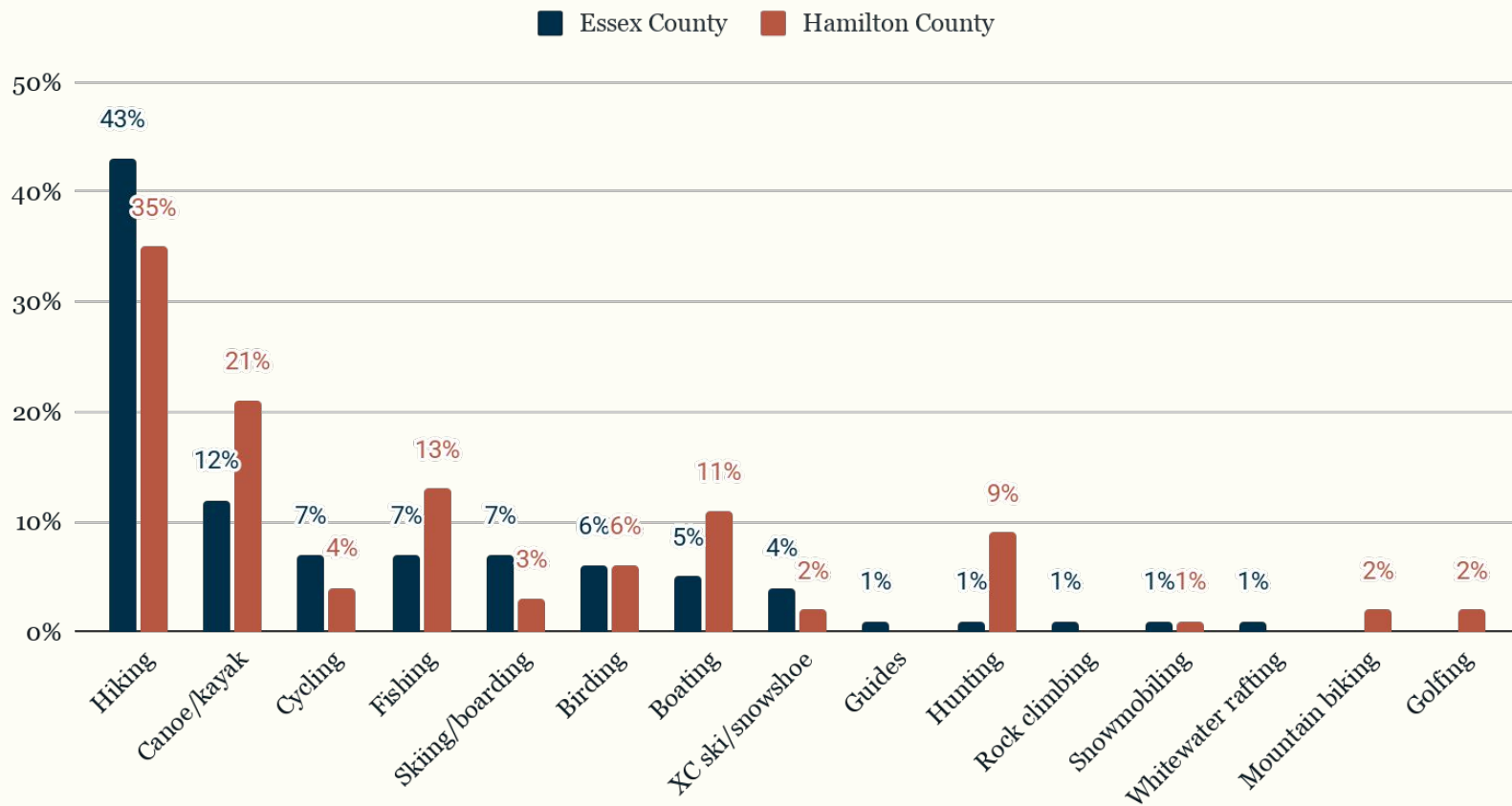


Five-year key attractions

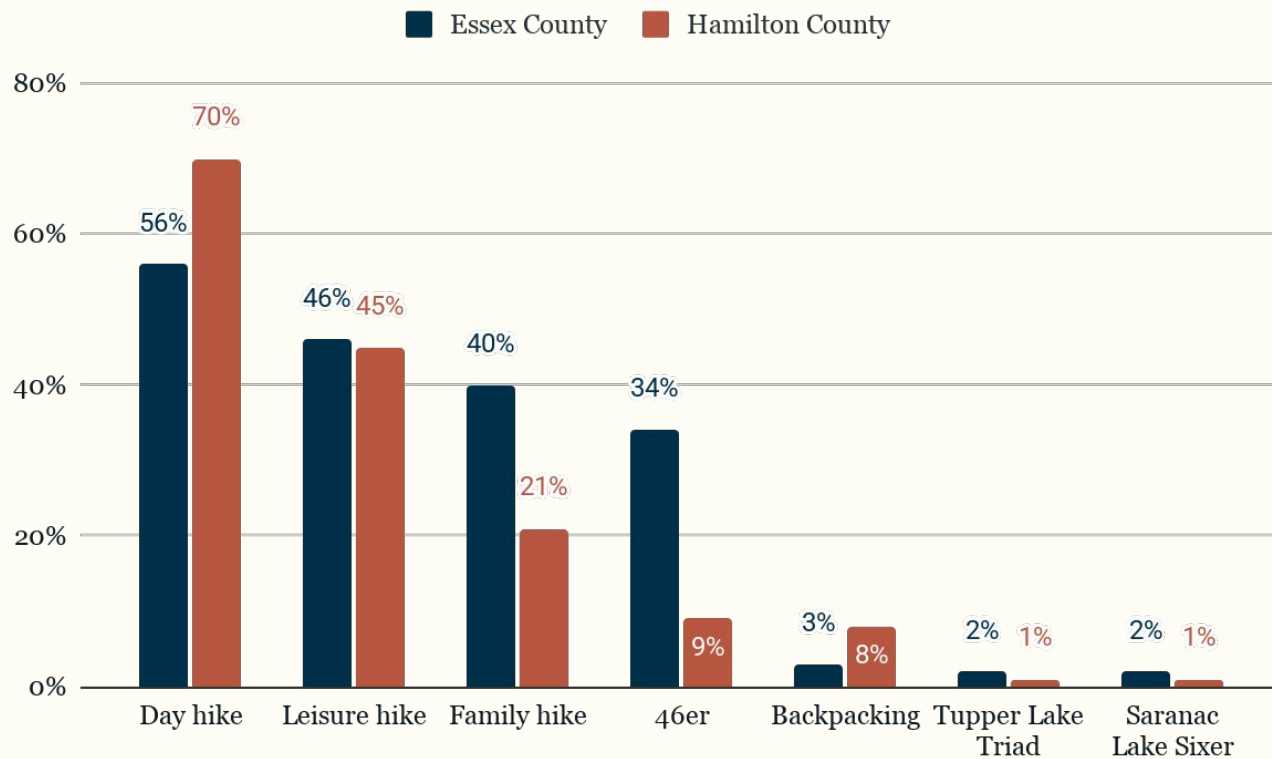
Essex County



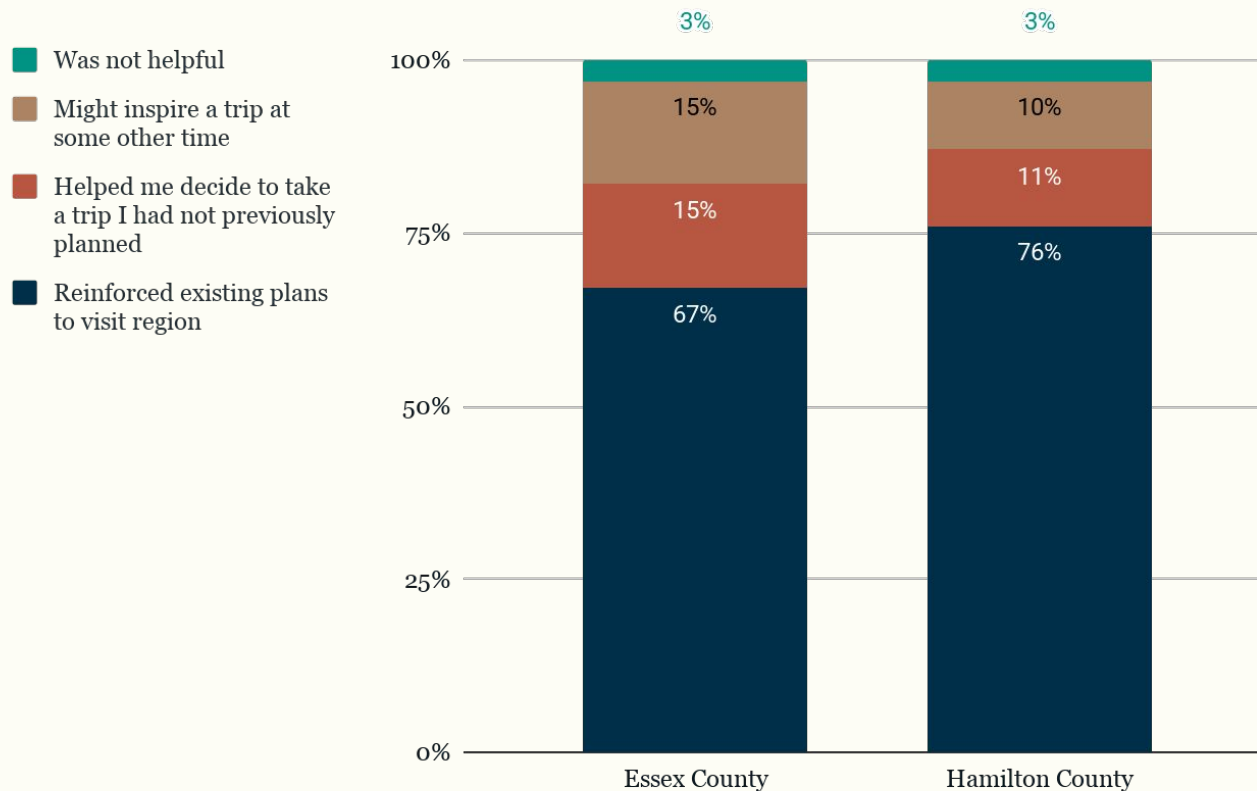
Outdoor activities



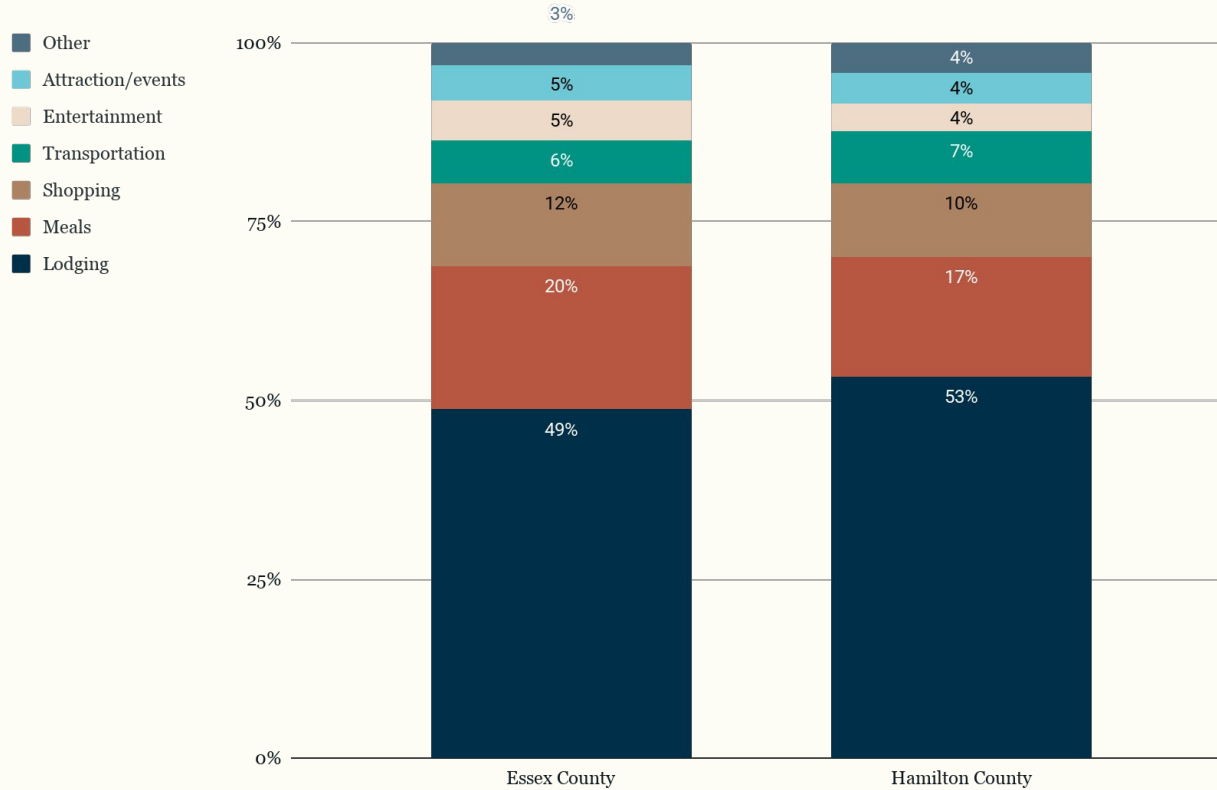
Hiking breakdown



Conversion rate from viewing ROOST marketing materials



Total expenditure allocation by category



Mean party expenditures

	Essex County	Hamilton County
Lodging	\$950	\$825
Meals	\$390	\$258
Shopping	\$226	\$160
Entertainment	\$107	\$61
Attractions & events	\$97	\$66
Transportation	\$118	\$112
Other	\$62	\$65
Average daily expenditure	\$476	\$309
Average total expenditure	\$1,950	\$1,547

Five-year mean party expenditures

Essex County

	2021	2022	2023	2024	2025	Five-year average
Lodging	\$679	\$950	\$895	\$945	\$950	\$884
Meals	\$287	\$311	\$331	\$308	\$390	\$325
Shopping	\$215	\$220	\$225	\$199	\$226	\$217
Entertainment	\$83	\$94	\$109	\$96	\$107	\$98
Attractions/events	\$83	\$100	\$108	\$89	\$97	\$95
Transportation	\$95	\$140	\$112	\$112	\$118	\$115
Other	\$40	\$80	\$98	\$85	\$62	\$73
Total daily	\$464	\$512	\$536	\$459	\$476	\$489
Total trip	\$1,484	\$1,895	\$1,878	\$1,834	\$1,950	\$1,808

Essex County Visitor Profile



Visitor profile

Essex County

- 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.

Visitor profile

Essex County

- 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.

Visitor profile

Essex County

- 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.

Visitor profile

Essex County

- 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.
- 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 2026 Winter Olympics.

Visitor profile

Essex County

- 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/boardng increased in 2025 visitors and cross-country skiing/snowshoeing 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 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.

Visitor profile

Essex County

- 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%).
- 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.

Visitor profile

Essex County

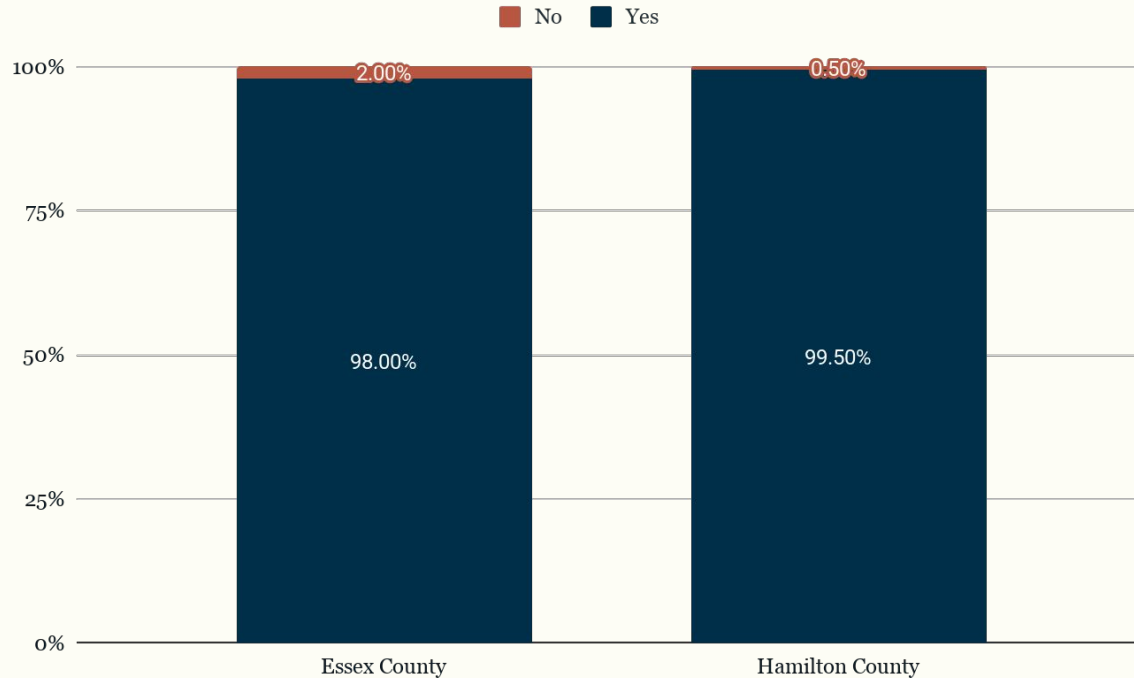
- Conversion measurement, the percentage of travelers who stated that the information or marketing viewed either helped them decide to take an unplanned trip or reinforced potential plans to visit, was 83%. This is consistent with the conversion average for the past five years.

Regional Visitor Sentiment



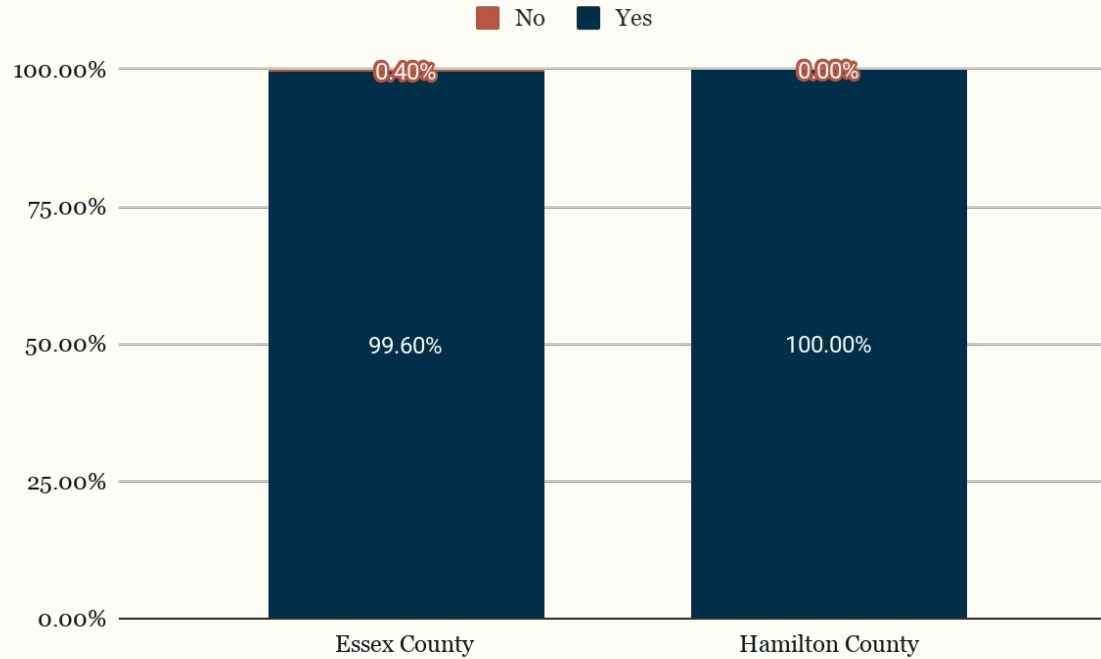
Regional visitor sentiment

Question: Would you be “likely” to recommend a visit to the region?



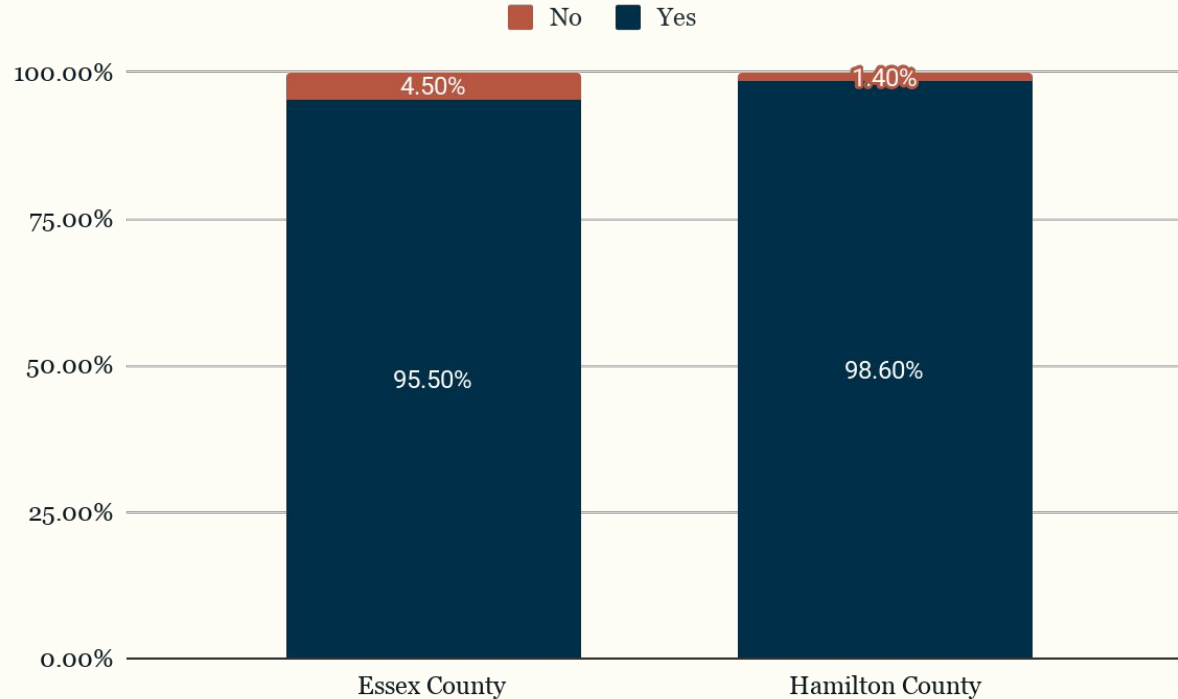
Regional visitor sentiment

Question: Would you like to return in the future?

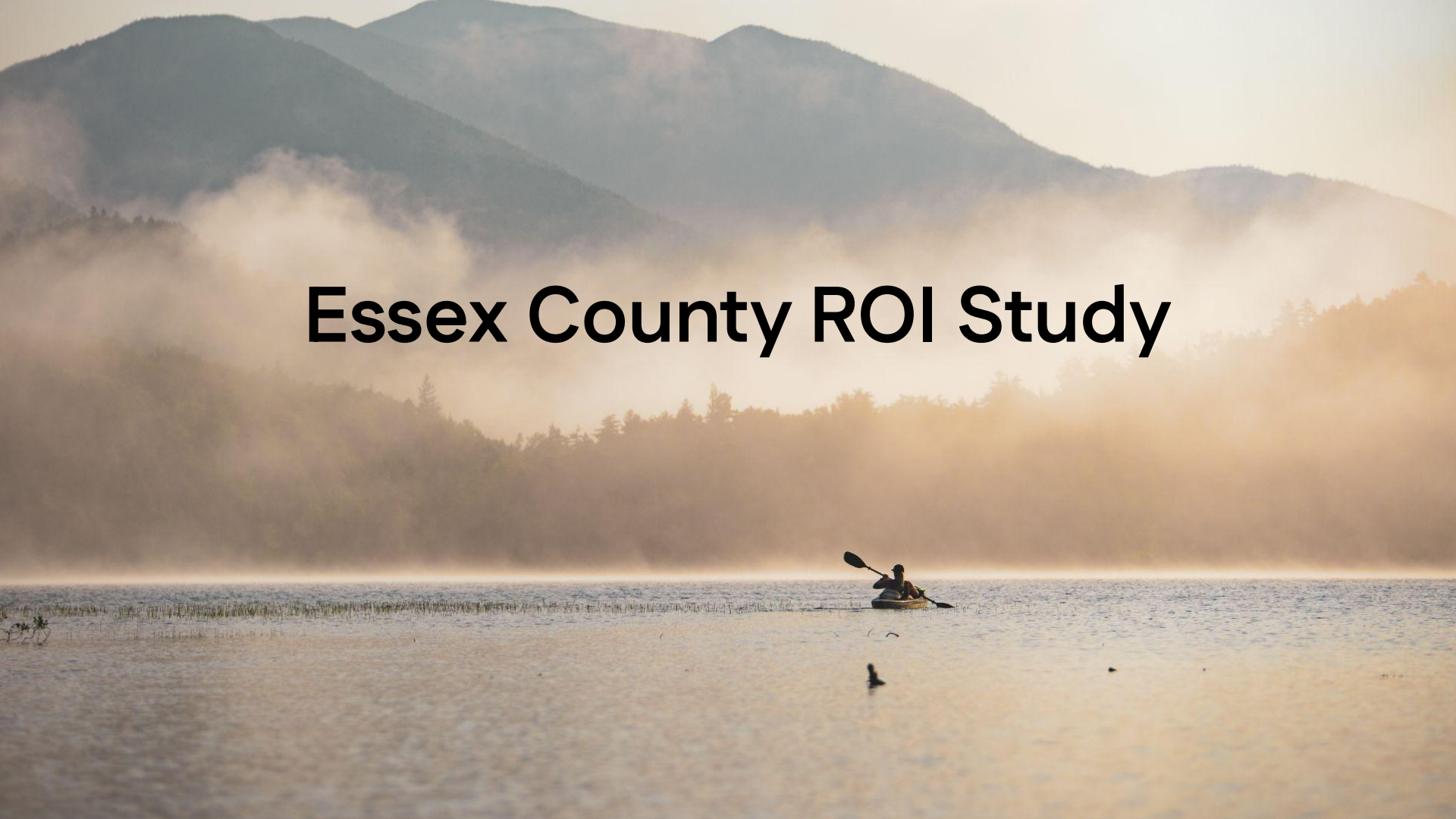


Regional visitor sentiment

Question: Did your trip meet your budget expectations?



Essex County ROI Study



Return on investment (ROI)

The estimated total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials is calculated by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures, and length of stay:

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

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2025 is **\$320,576,920**

Return on investment (ROI)

To determine the ROI of ROOST expenditures for impacted visitor spending, the total revenue generated by travelers by the marketing dollars is divided by dollars spent by the total ROOST marketing budget:

\$320,576,920 (total estimated traveler revenue) / \$3,284,441

(total ROOST marketing expenditures)

*Return on Investment (ROI) = **98:1***