



Leisure Travel Study

Essex and Hamilton Counties, Saranac Lake, and Tupper Lake

2025 COUNTY VISITOR PROFILES AND REGIONAL
RETURN ON MARKETING INVESTMENT ANALYSIS

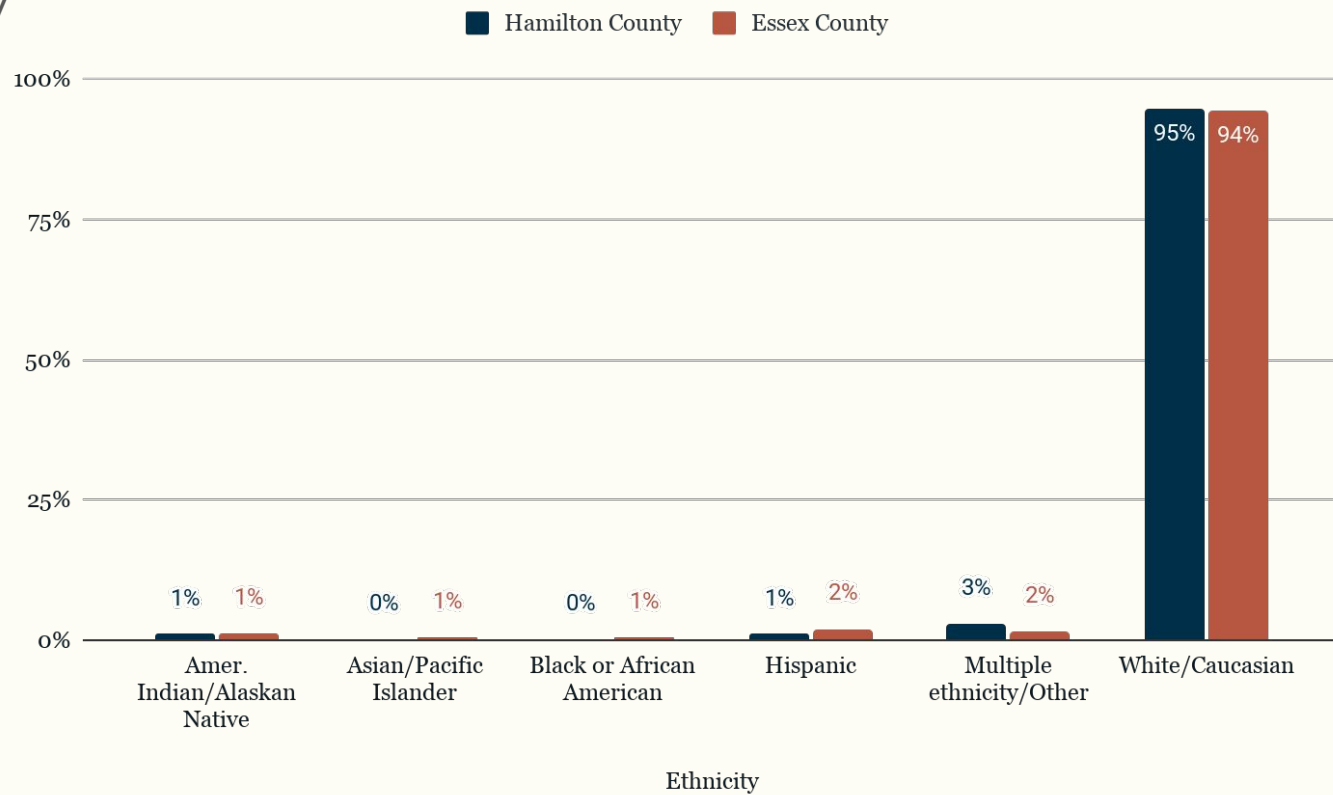
ROOST

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, via email and other 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.
- In this report, "all travelers" refers to visitors to Essex and Hamilton counties, and the villages of Tupper Lake and Saranac Lake in Franklin County.
- 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 216,713 traceable leads who were interested in visiting the region in 2025. PlaceMaking also compiled similar research for Essex and Hamilton counties individually, which 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 also available under a separate cover.

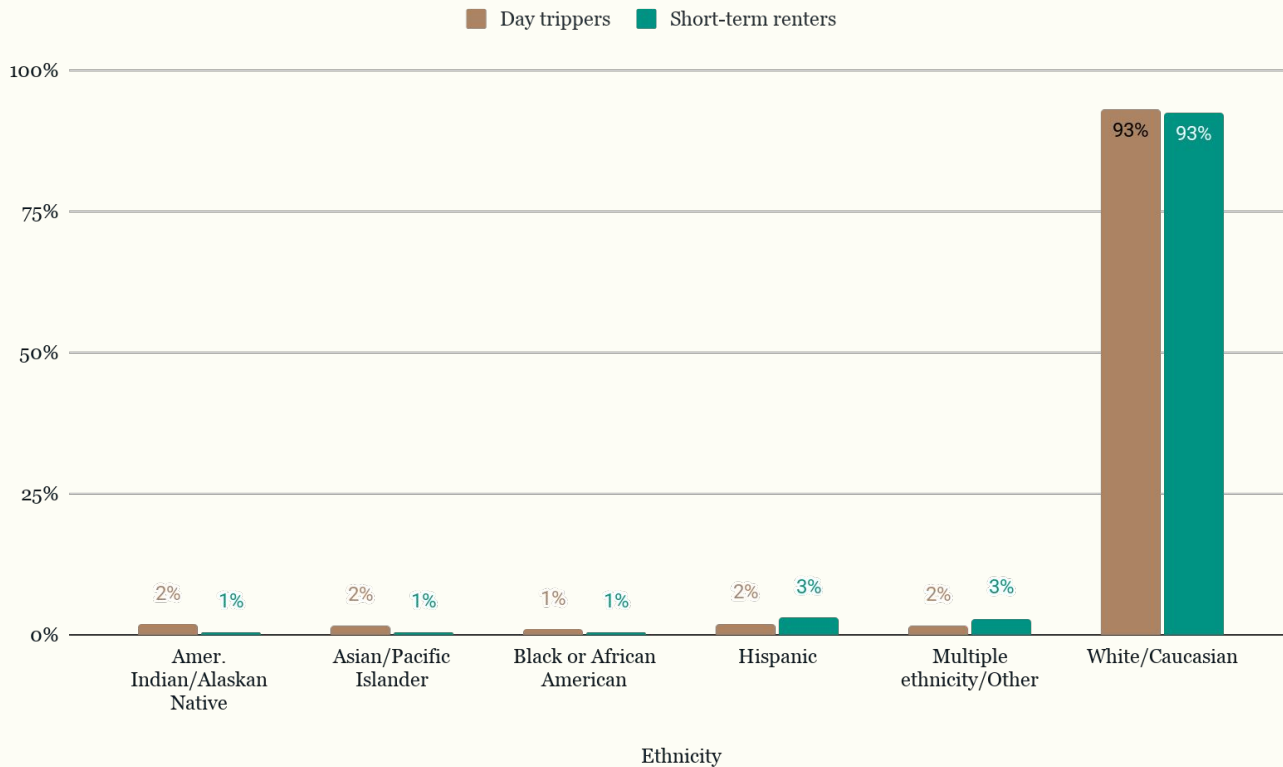
Ethnicity

By county



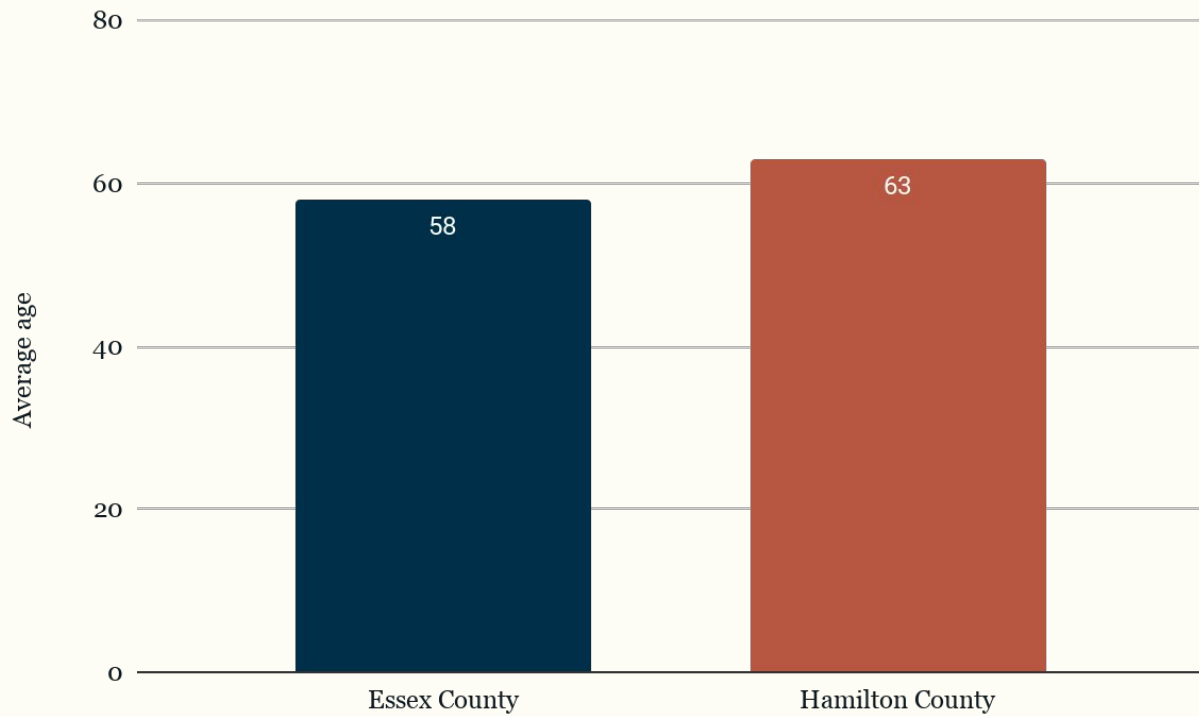
Ethnicity

Day-trippers / Short-term renters



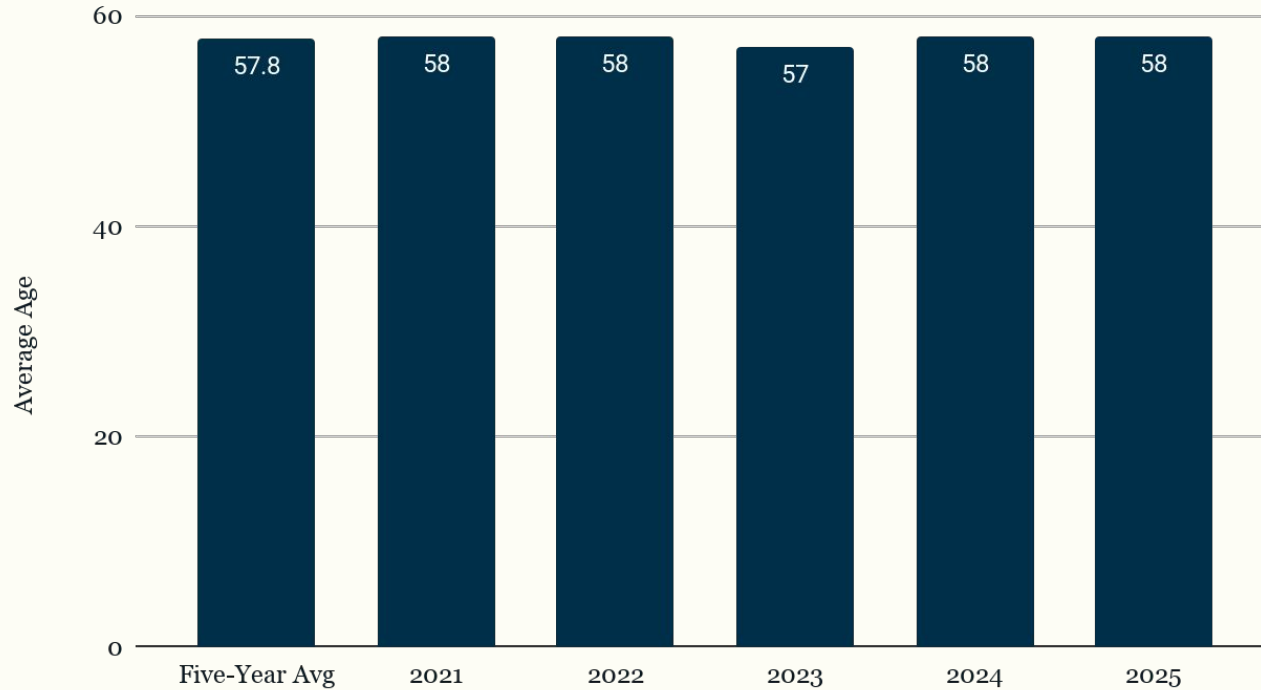
Average age

By county



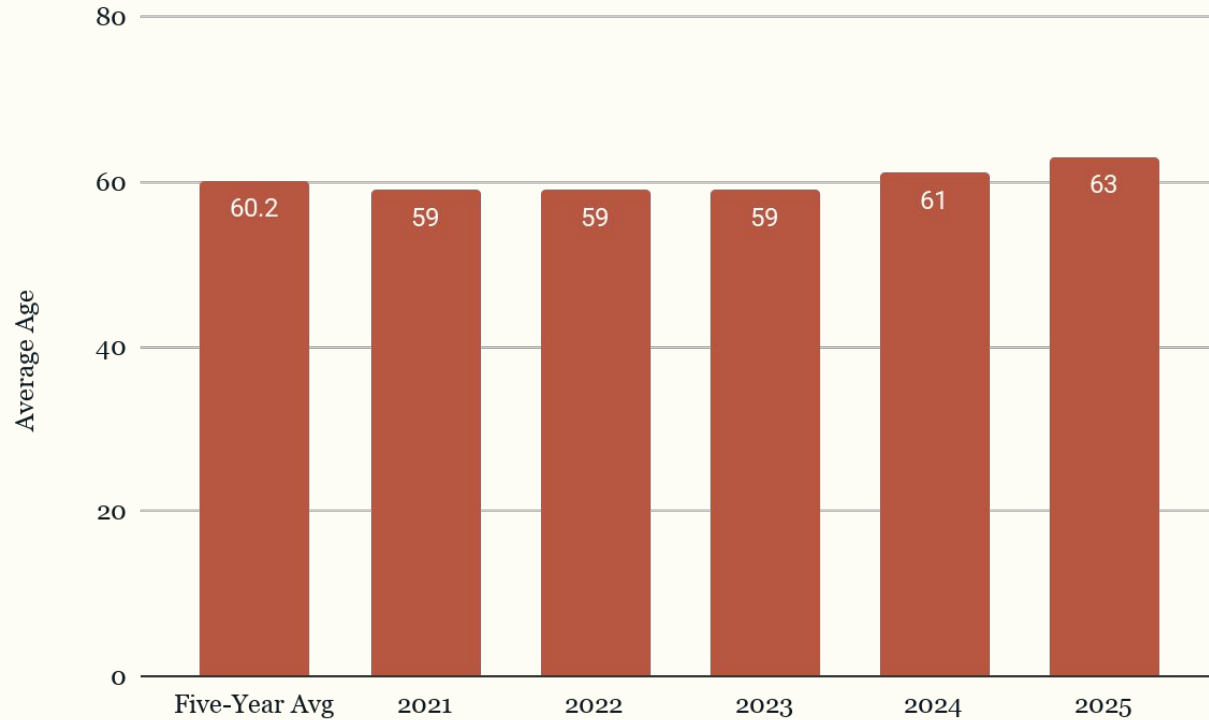
Five-year average age

Essex County



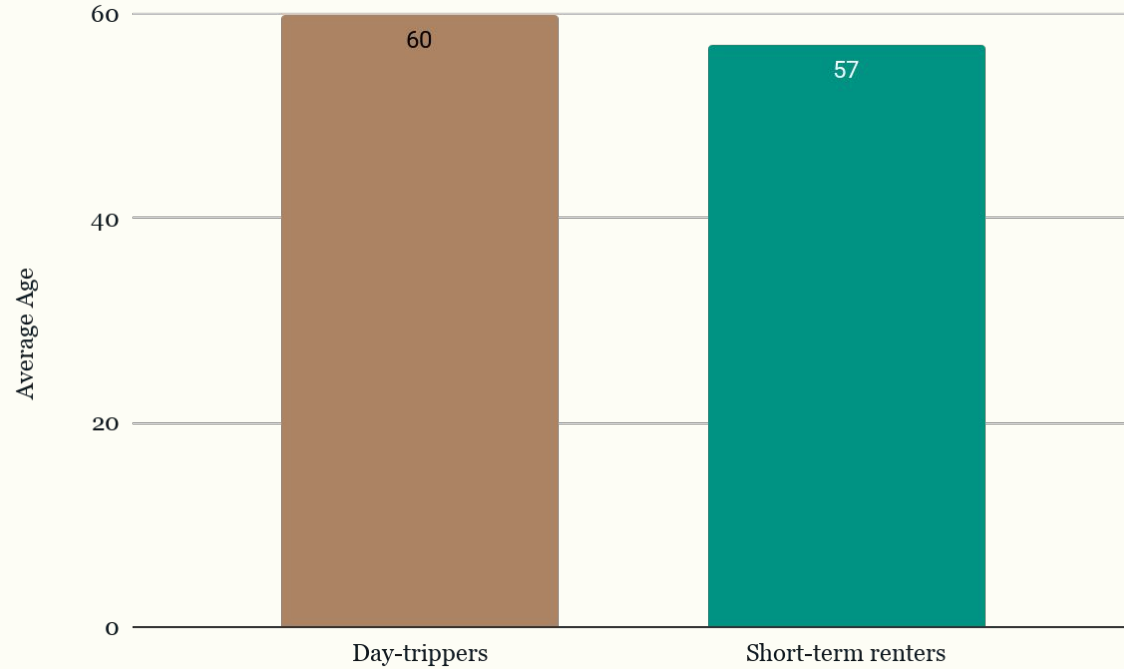
Five-year average age

Hamilton County



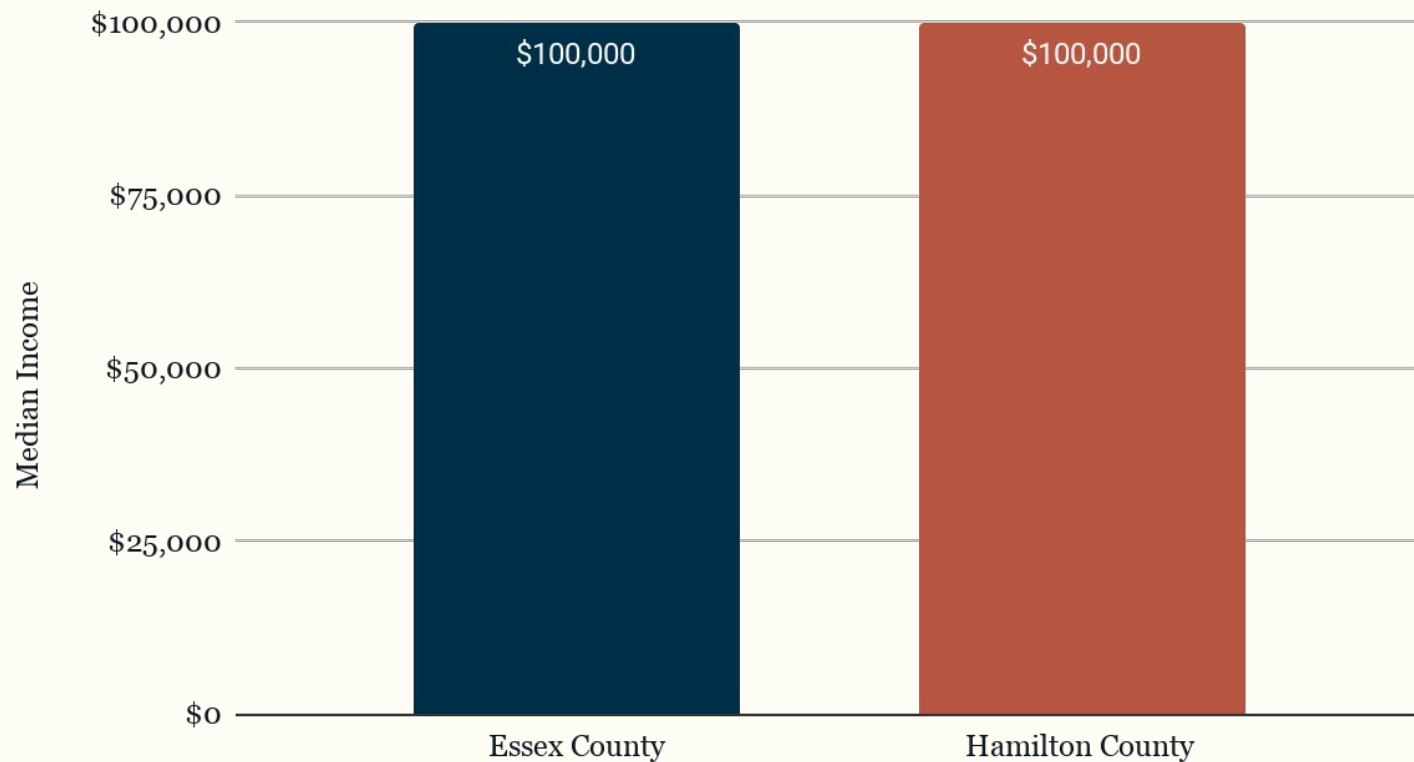
Average age

Day-trippers / Short-term renters



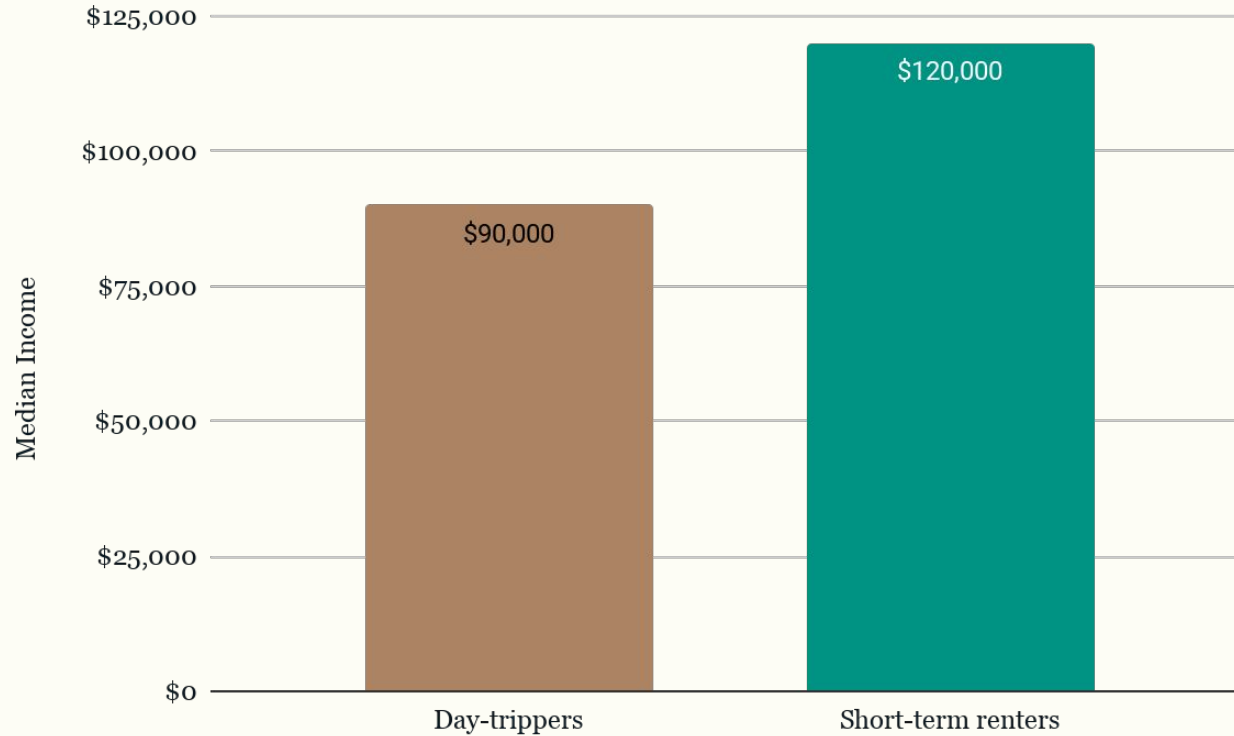
Median income

By county



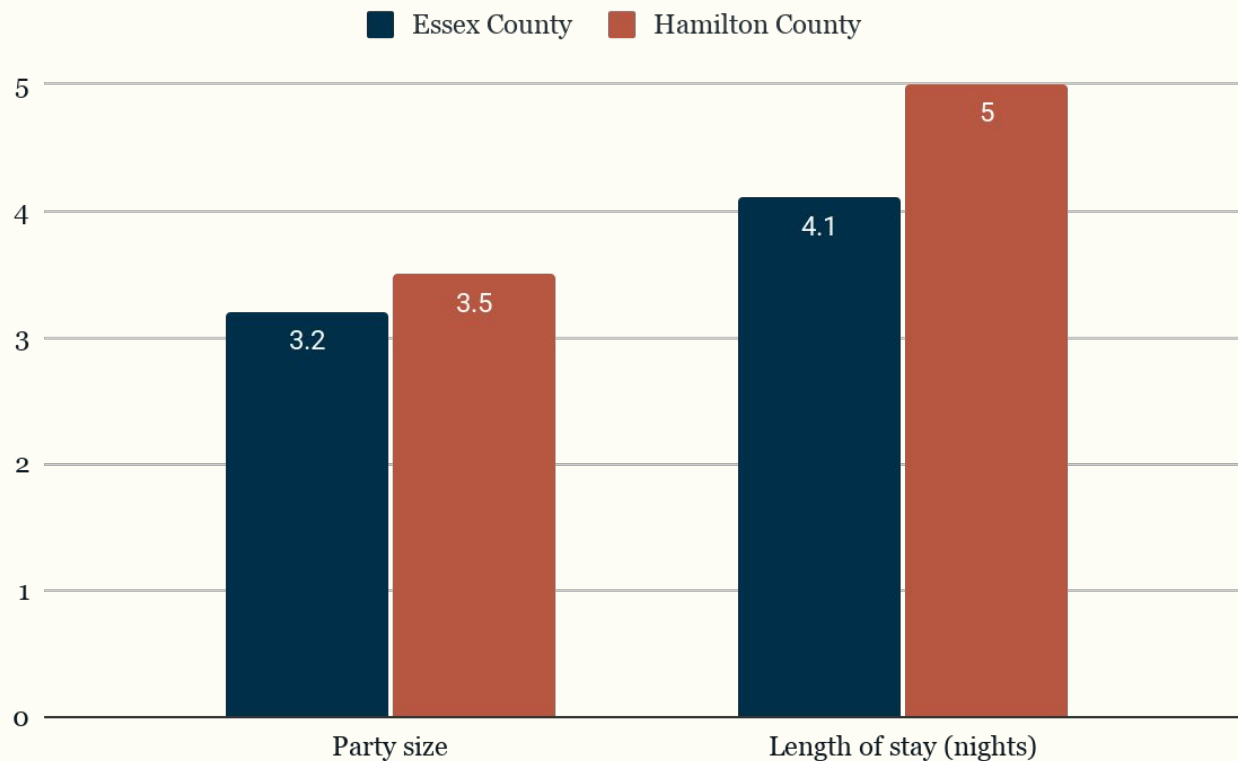
Median income

Day-trippers / Short-term renters



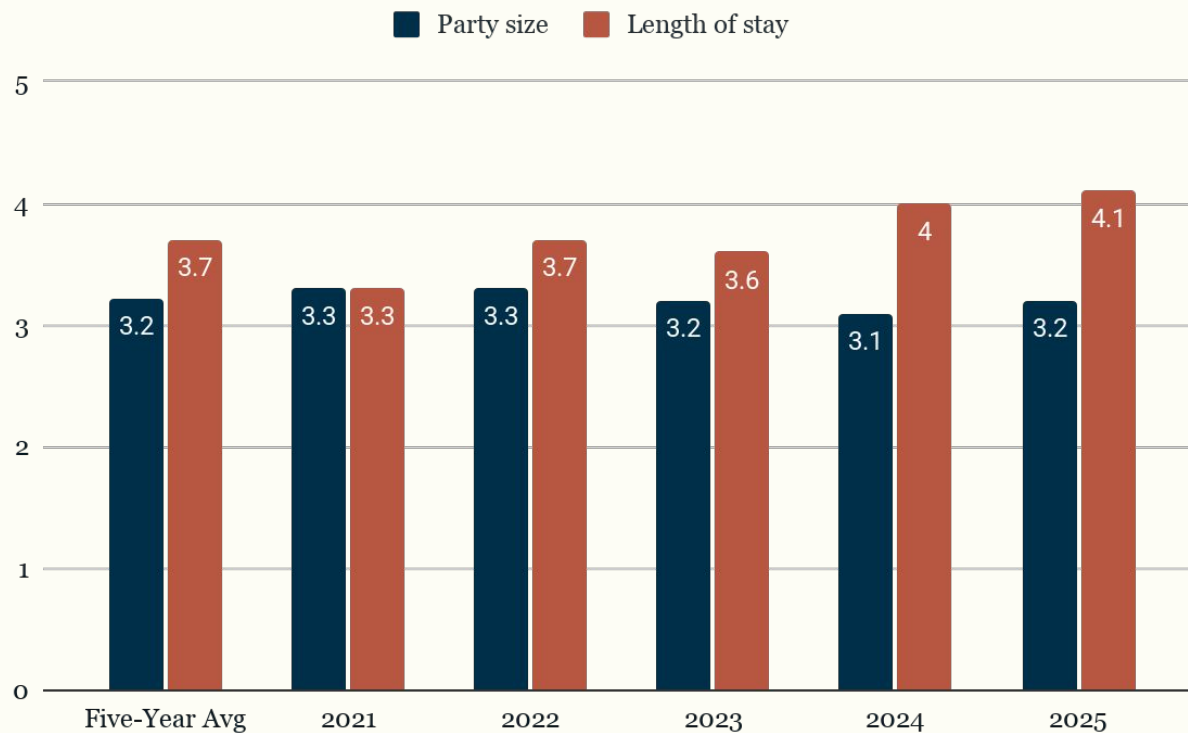
Party size / Length of stay

By county



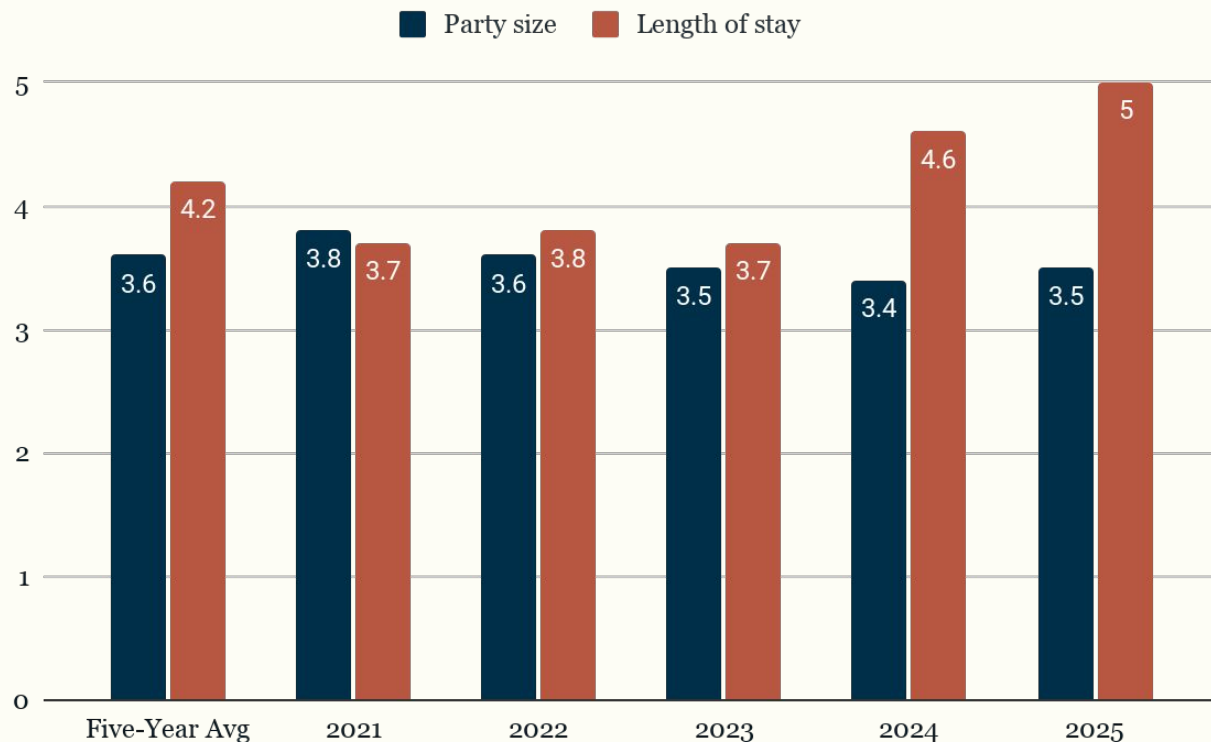
Five-year average party size / Length of stay

Essex County



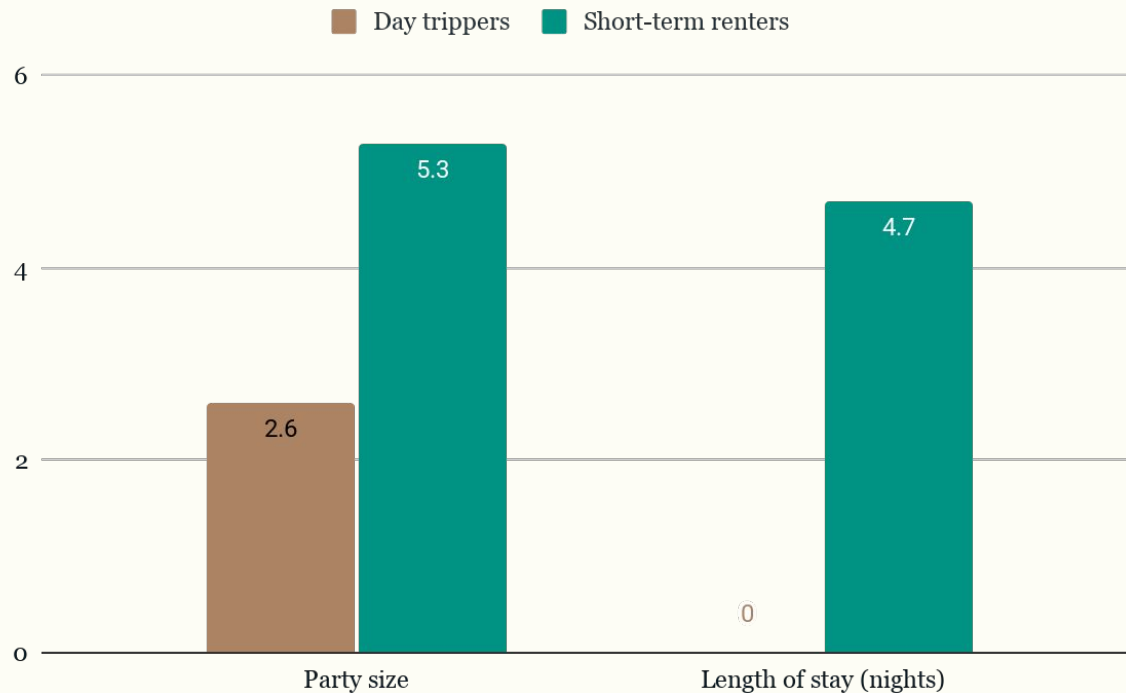
Five-year average party size / Length of stay

Hamilton County



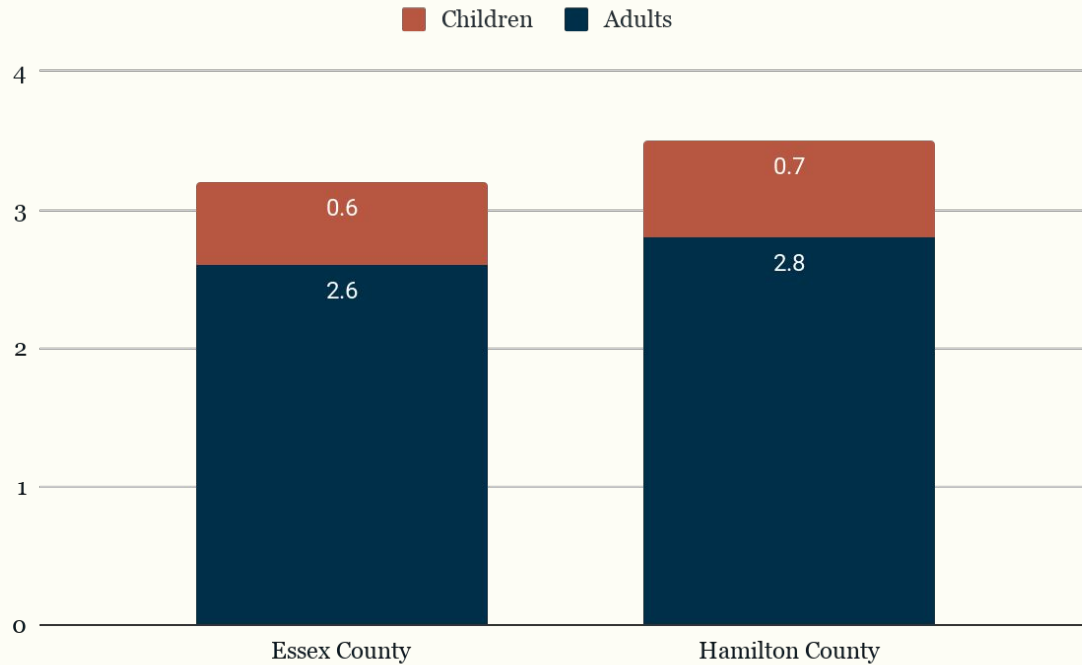
Party size / Length of stay

Day-trippers / Short-term renters



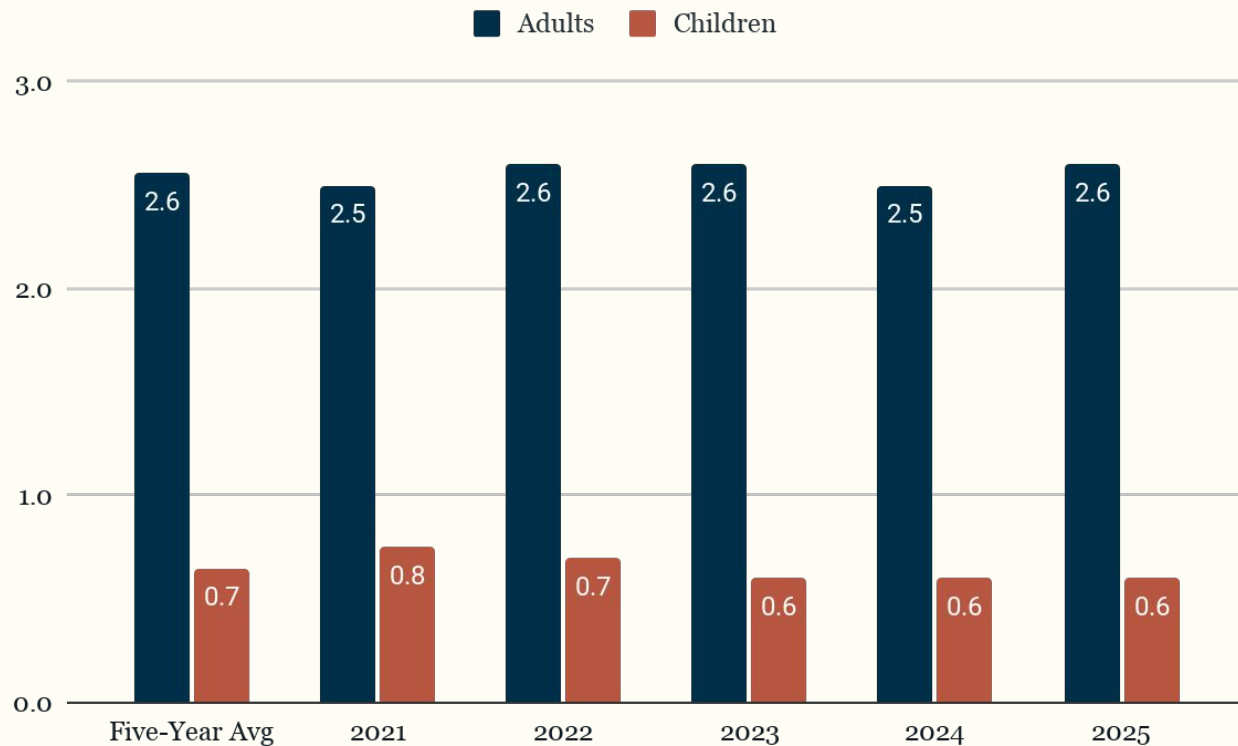
Party composition

By county



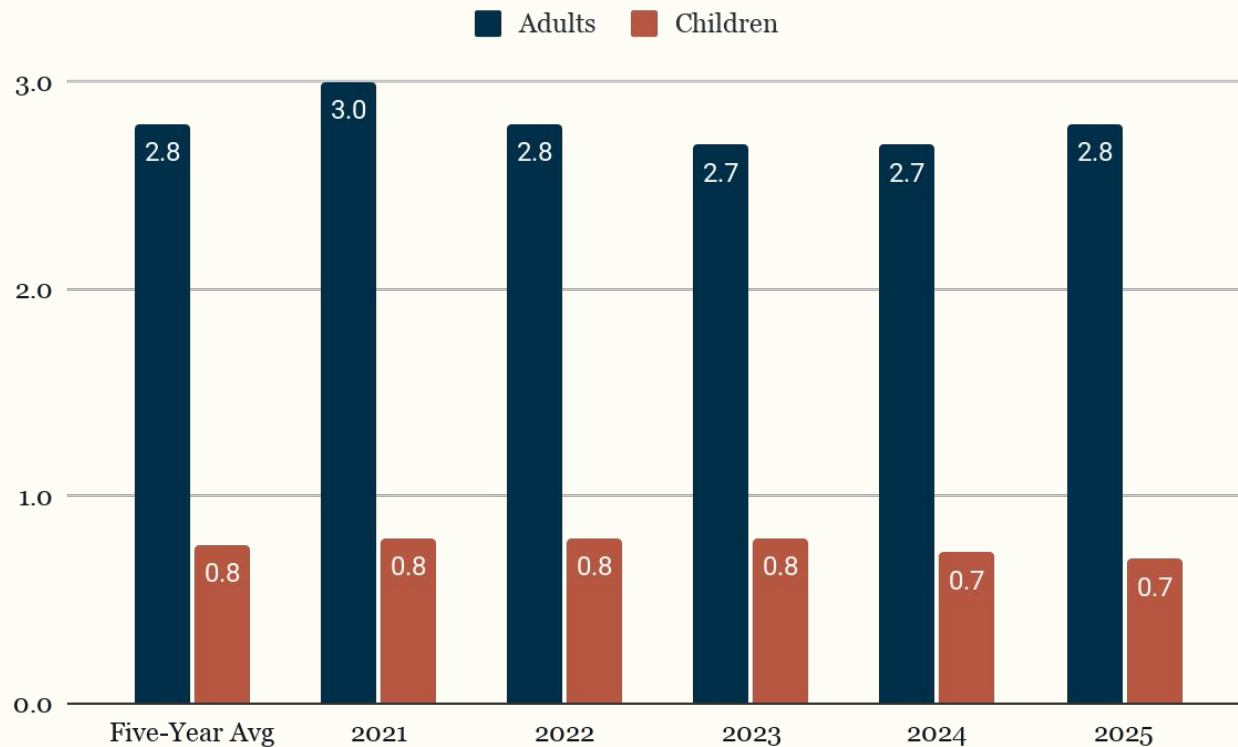
Five-year average party composition

Essex County



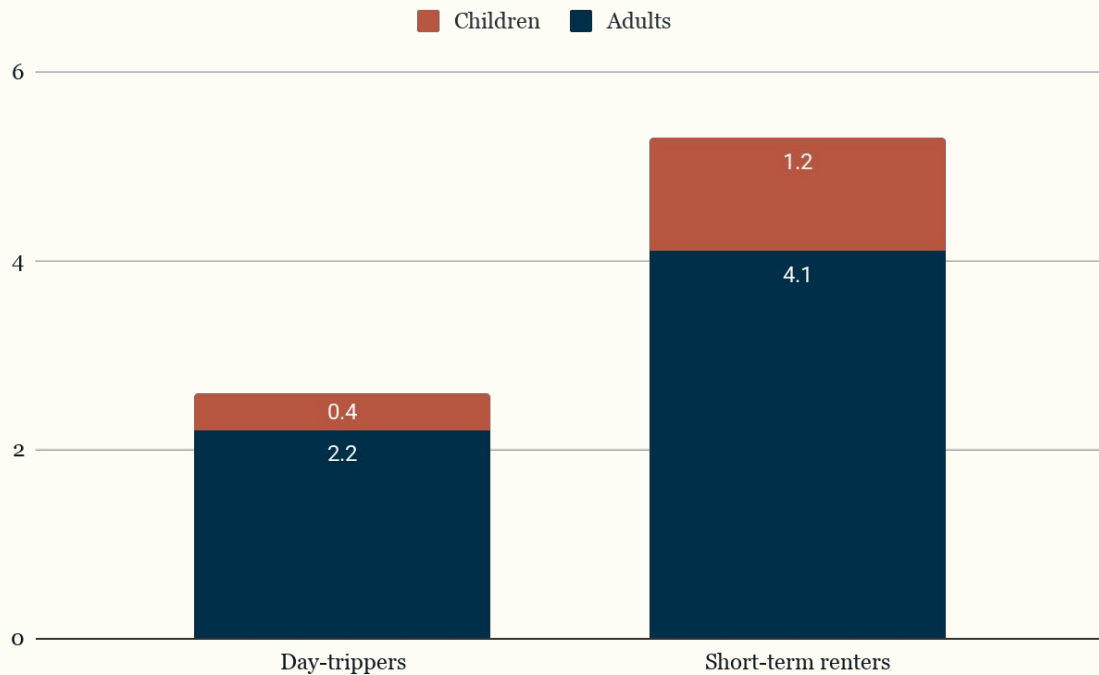
Five-year average party composition

Hamilton County



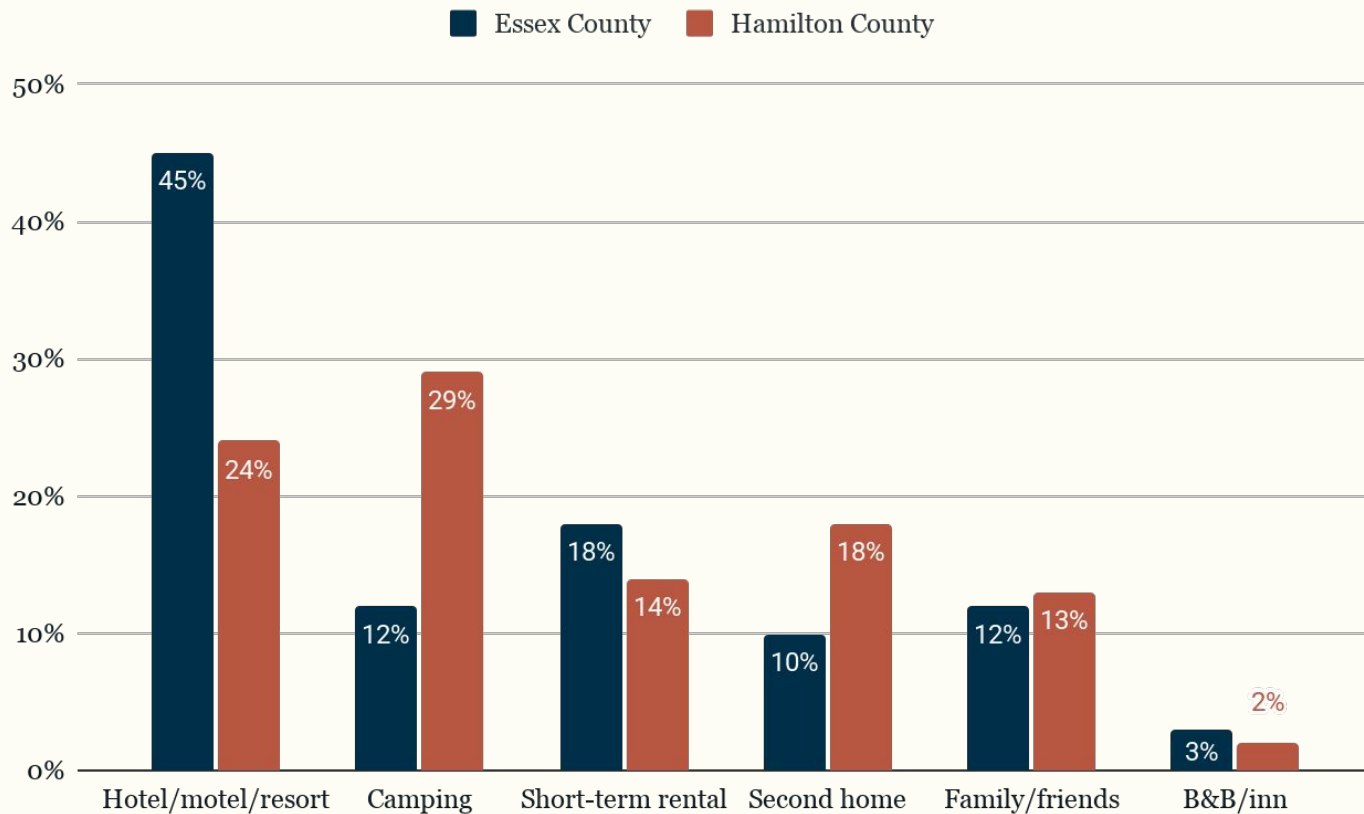
Party composition

Day-trippers / Short-term renters



Lodging accommodations

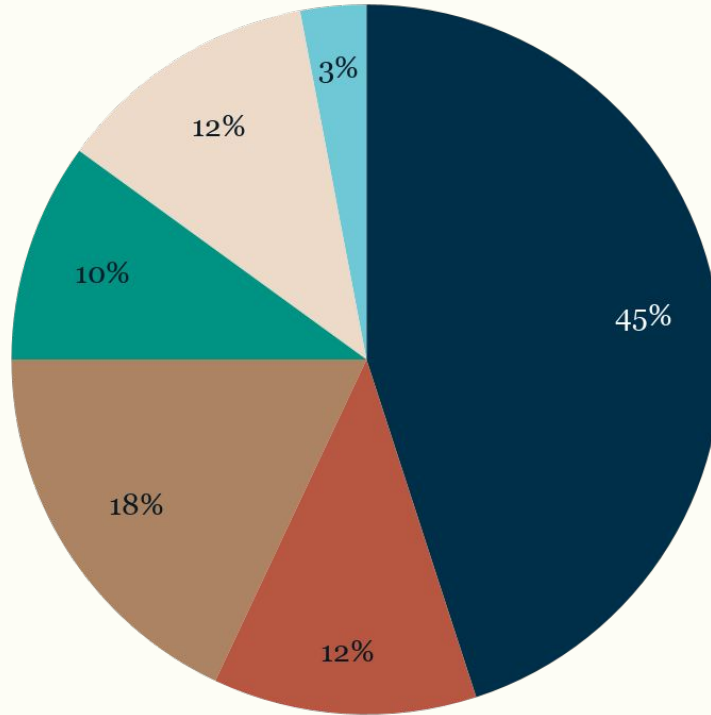
By county



Lodging accommodations

Essex County

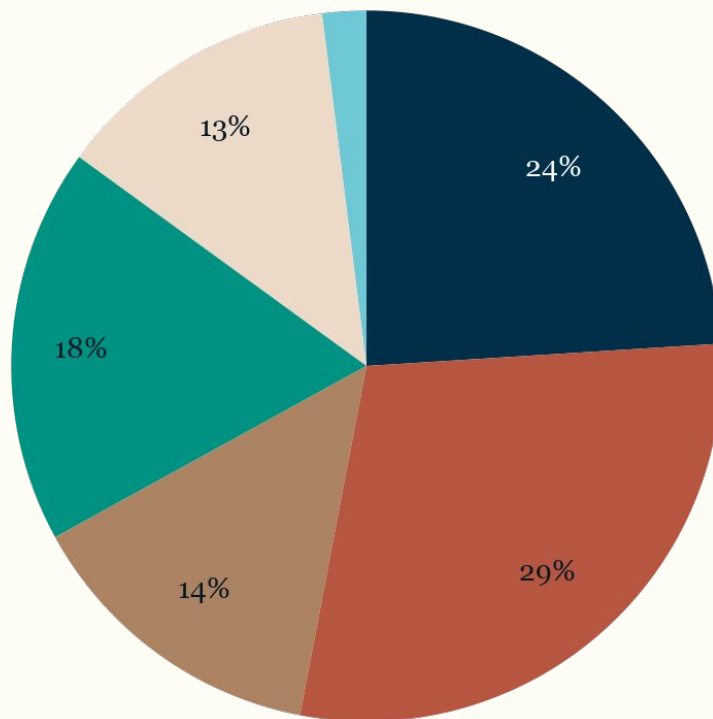
- Hotel/motel/resort
- Camping
- Short-term rental
- Second home
- Family/friends
- B&B/inn



Lodging accommodations

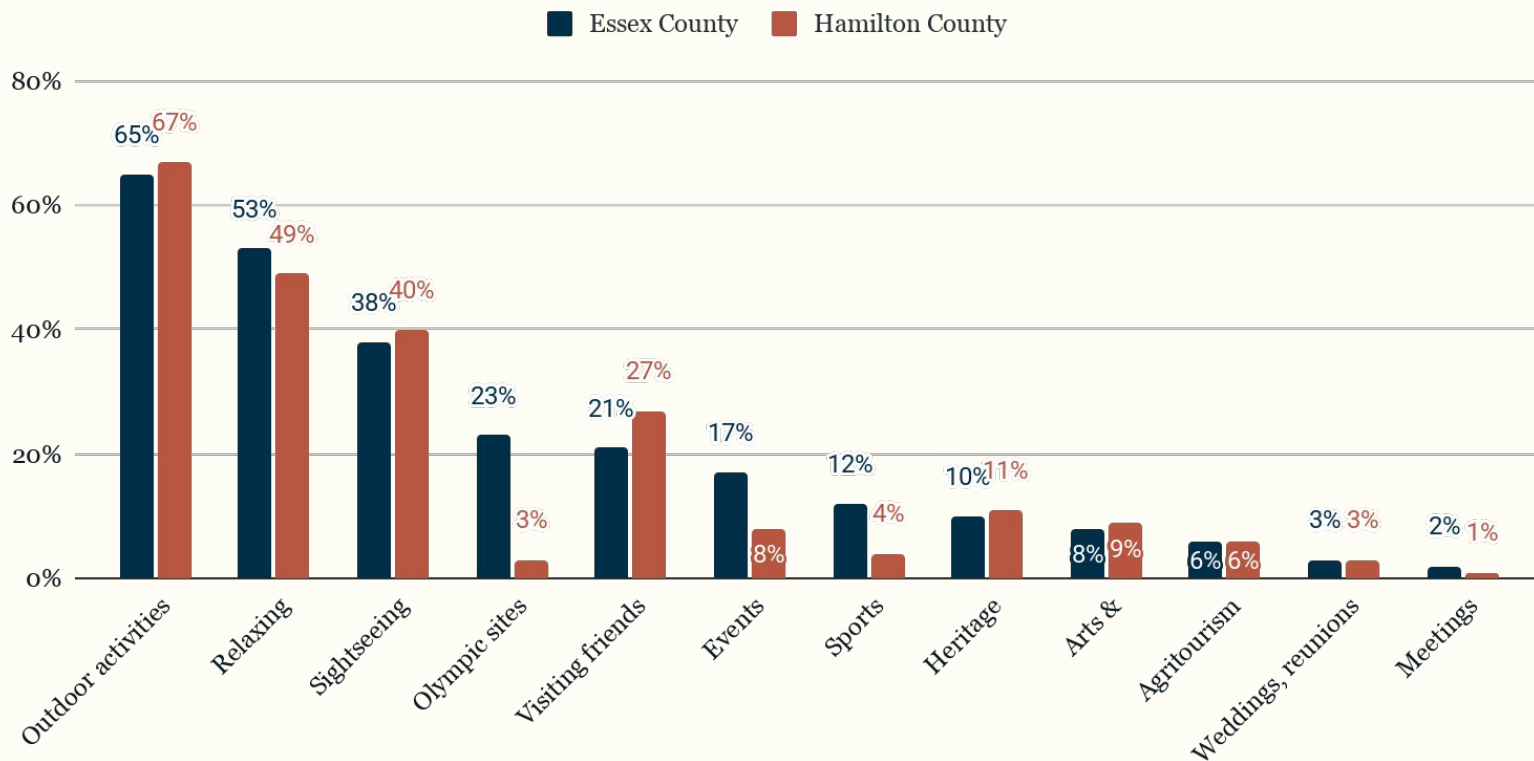
Hamilton County

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



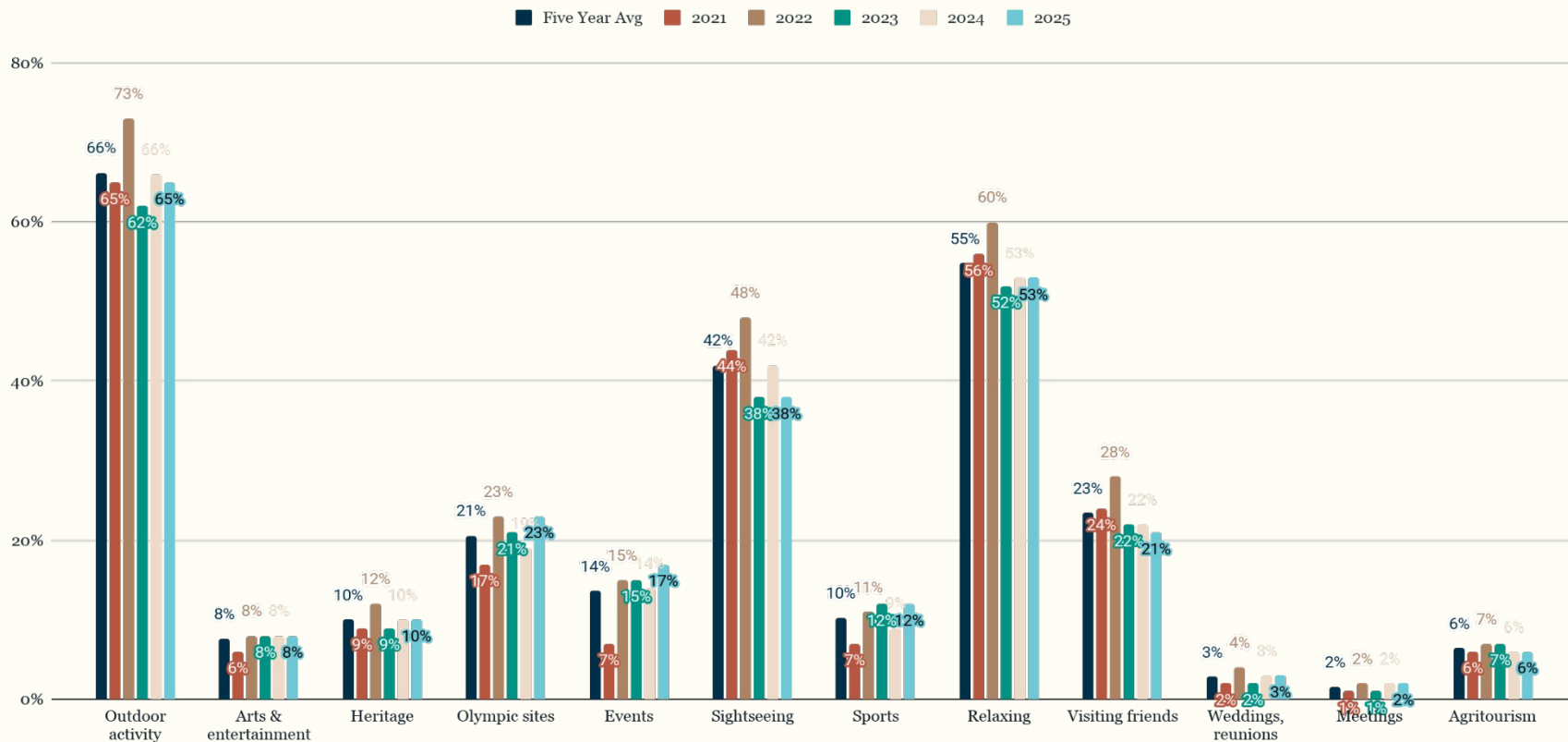
Key attractions

By county



Five-year key attractions

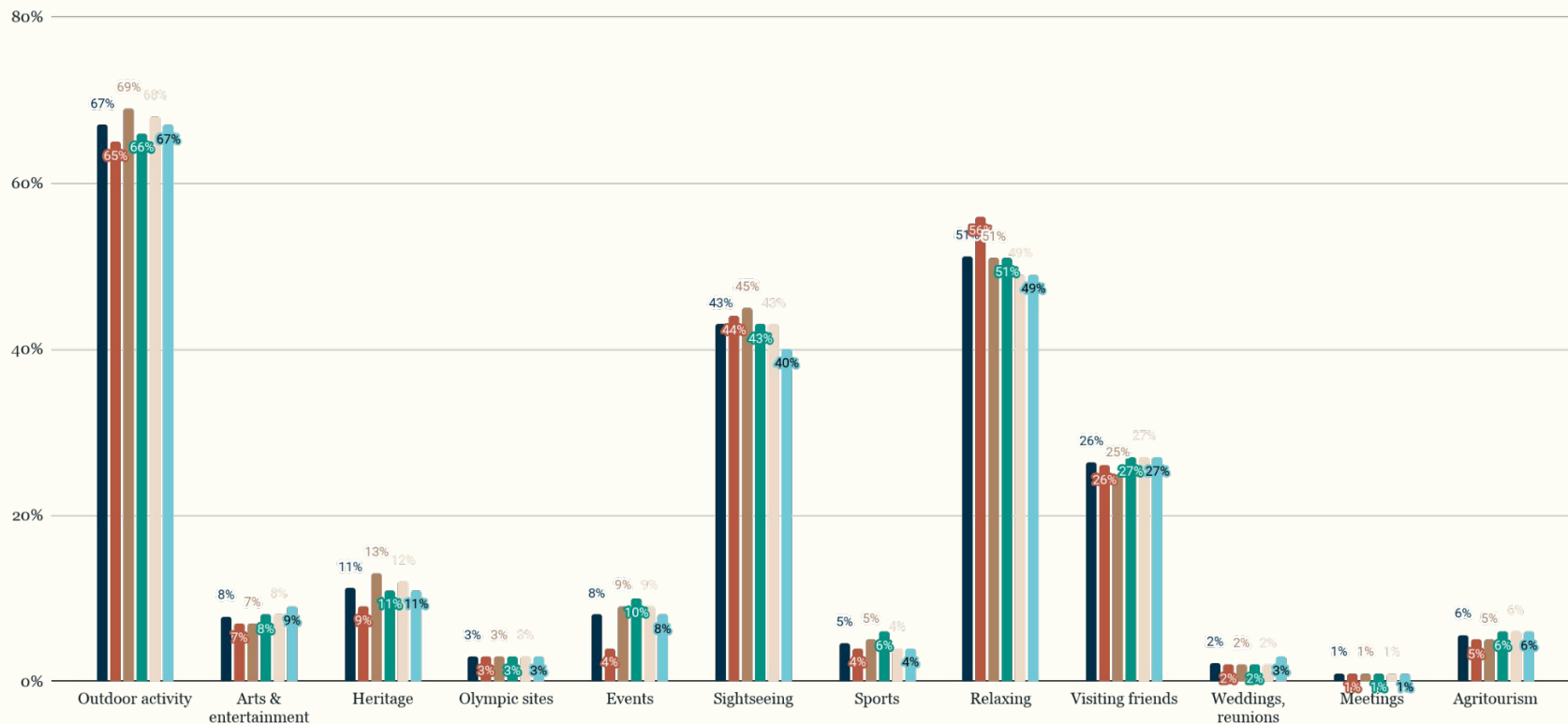
Essex County



Five-year key attractions

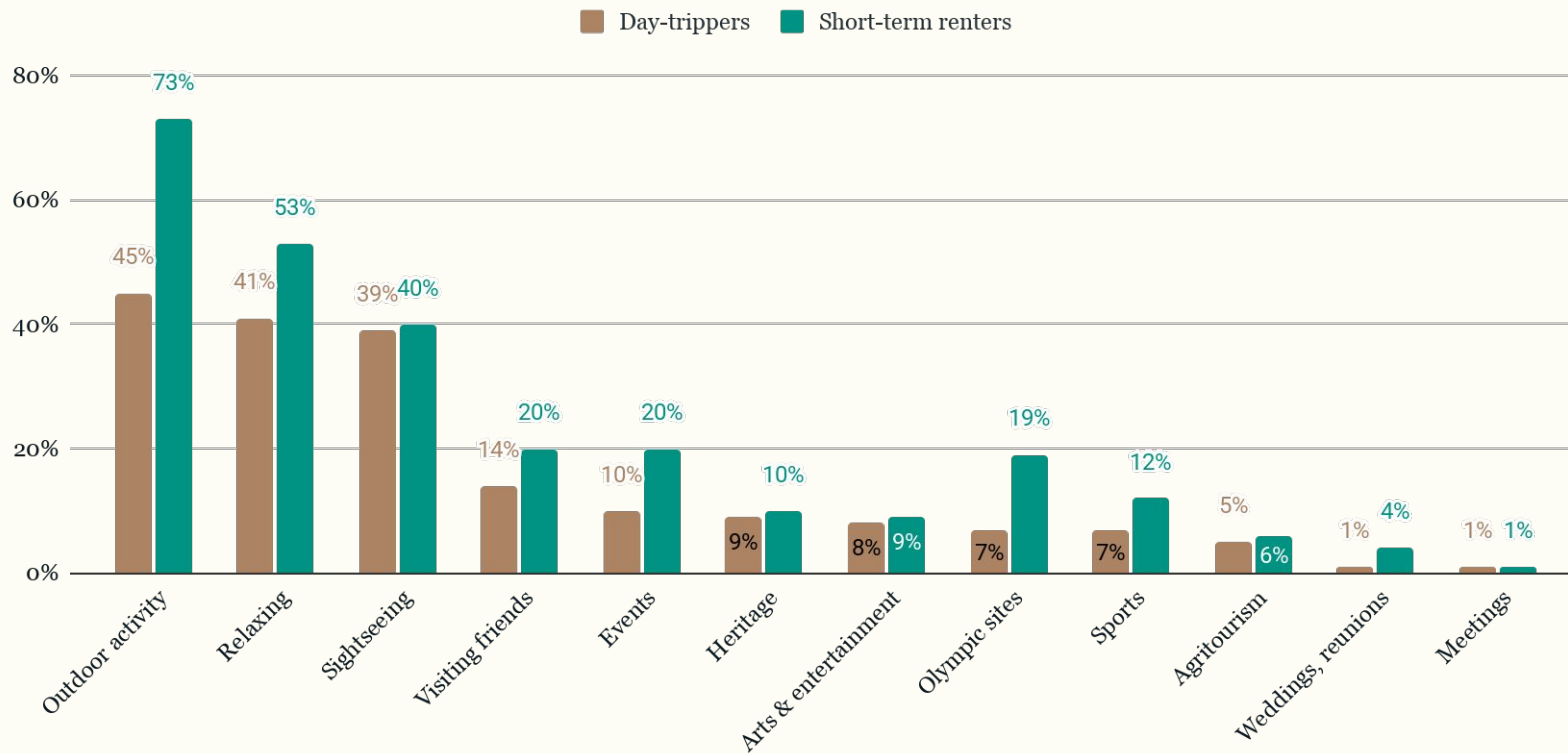
Hamilton County

■ Five Year Avg ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025



Key attractions

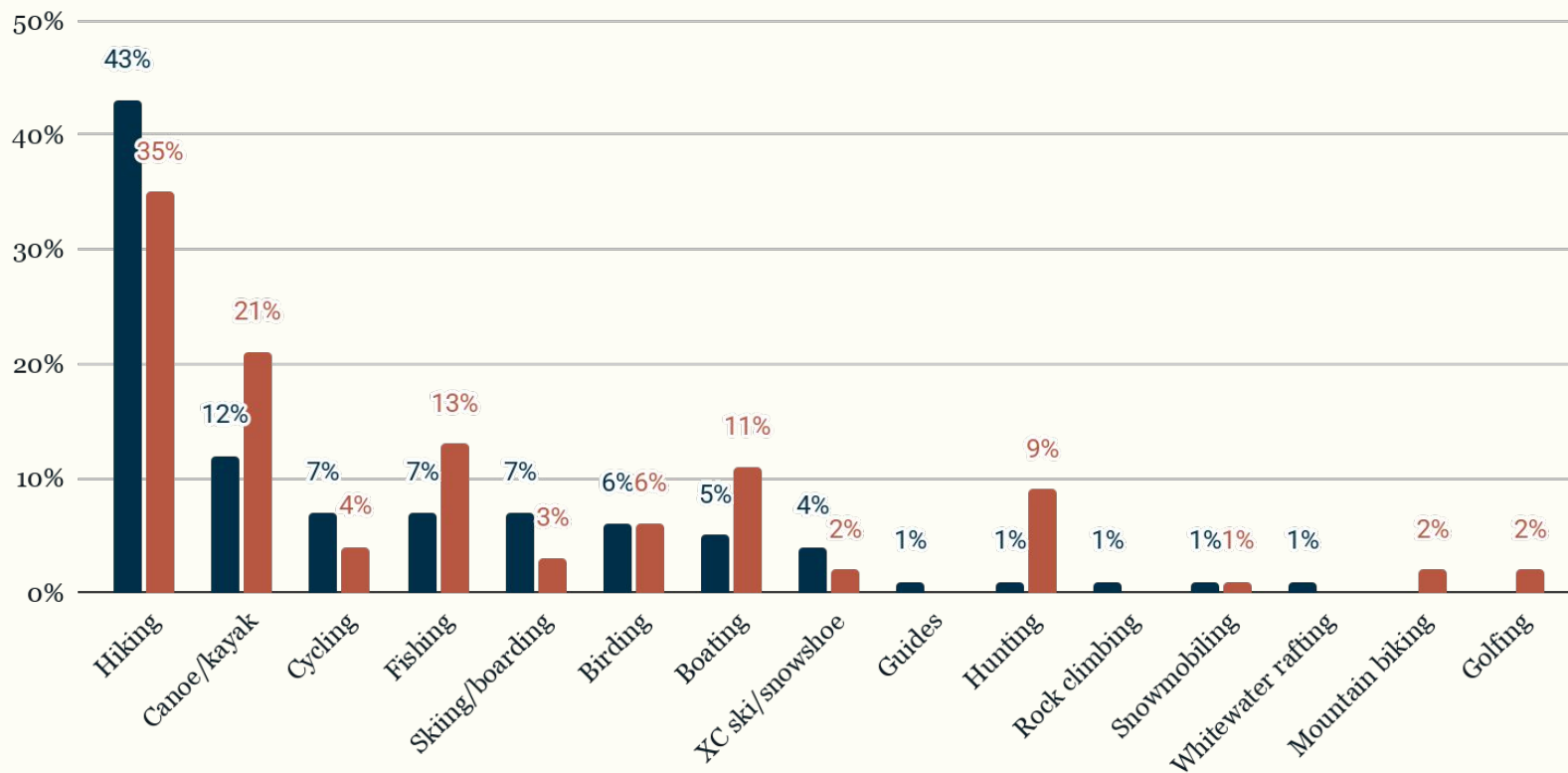
Day-trippers / Short-term renters



Outdoor activities

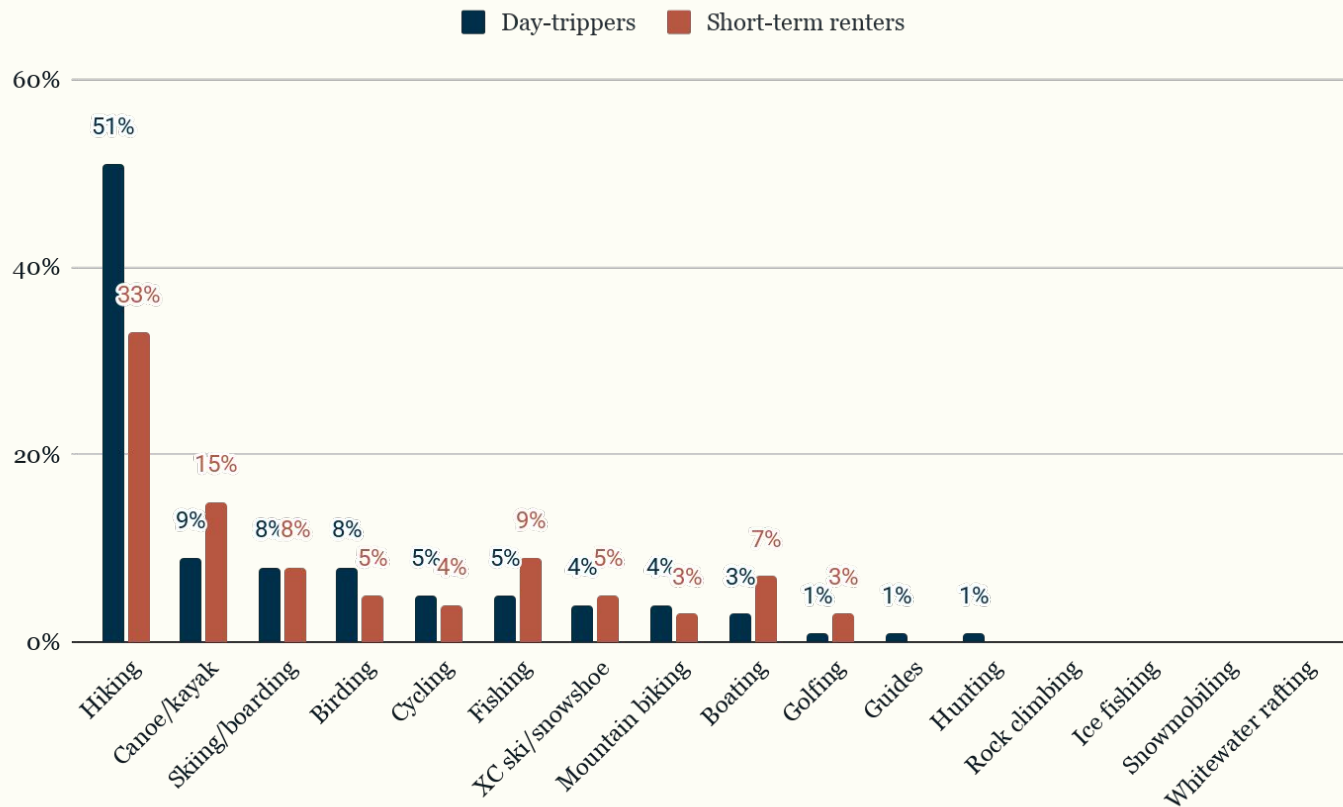
By county

Essex County Hamilton County



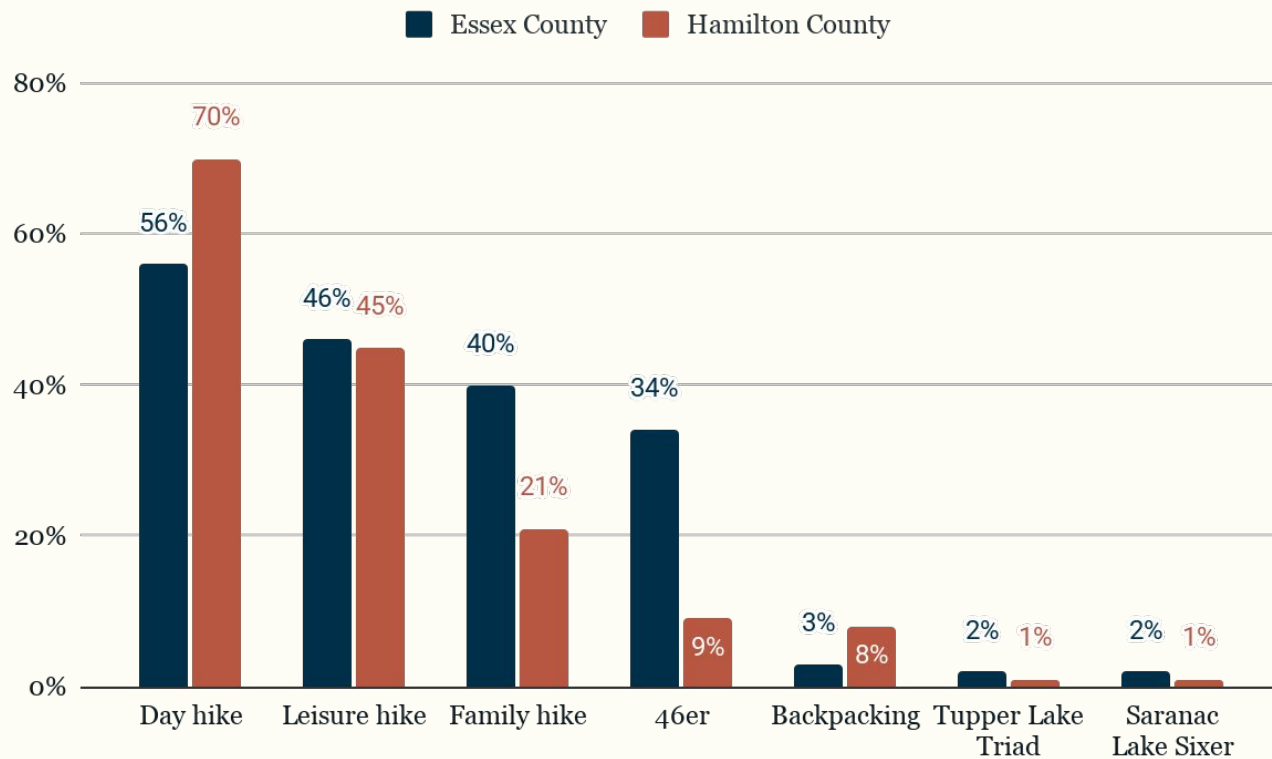
Outdoor activities

Day-trippers / Short-term renters



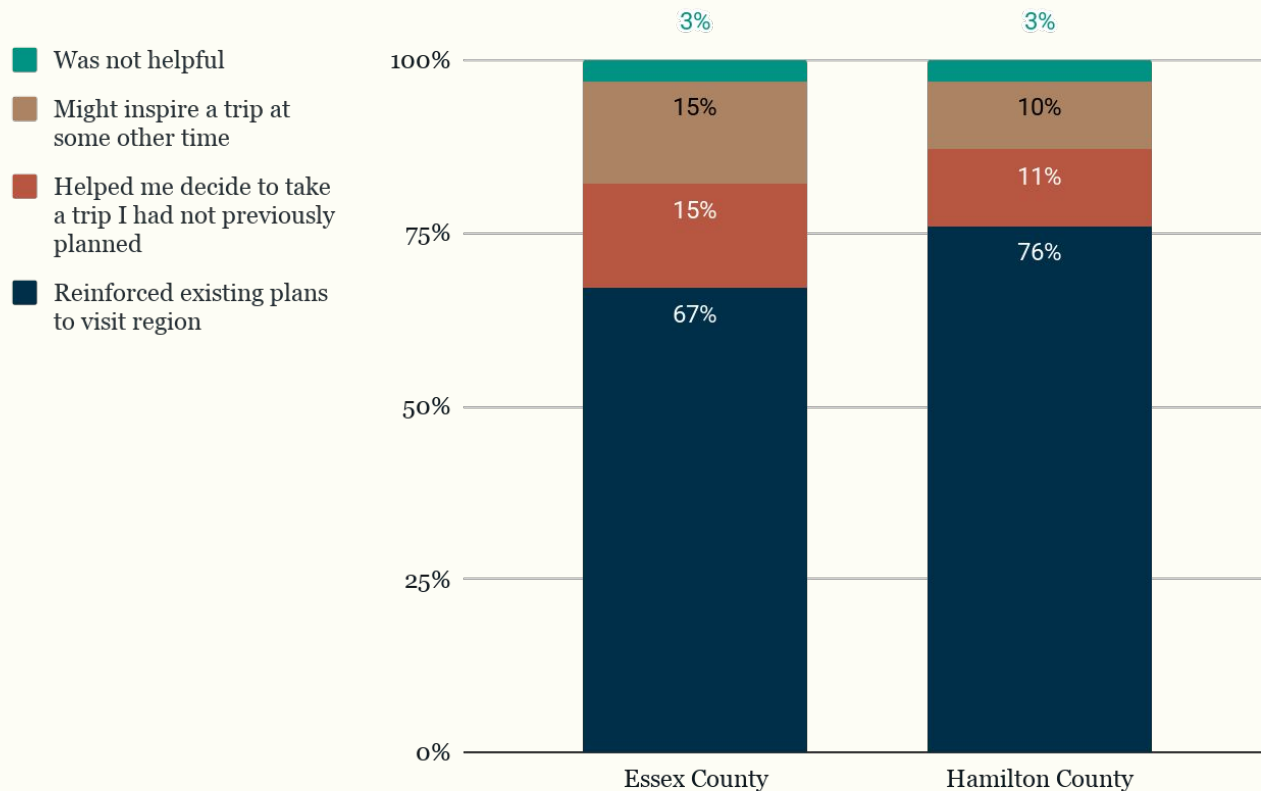
Hiking breakdown

By county



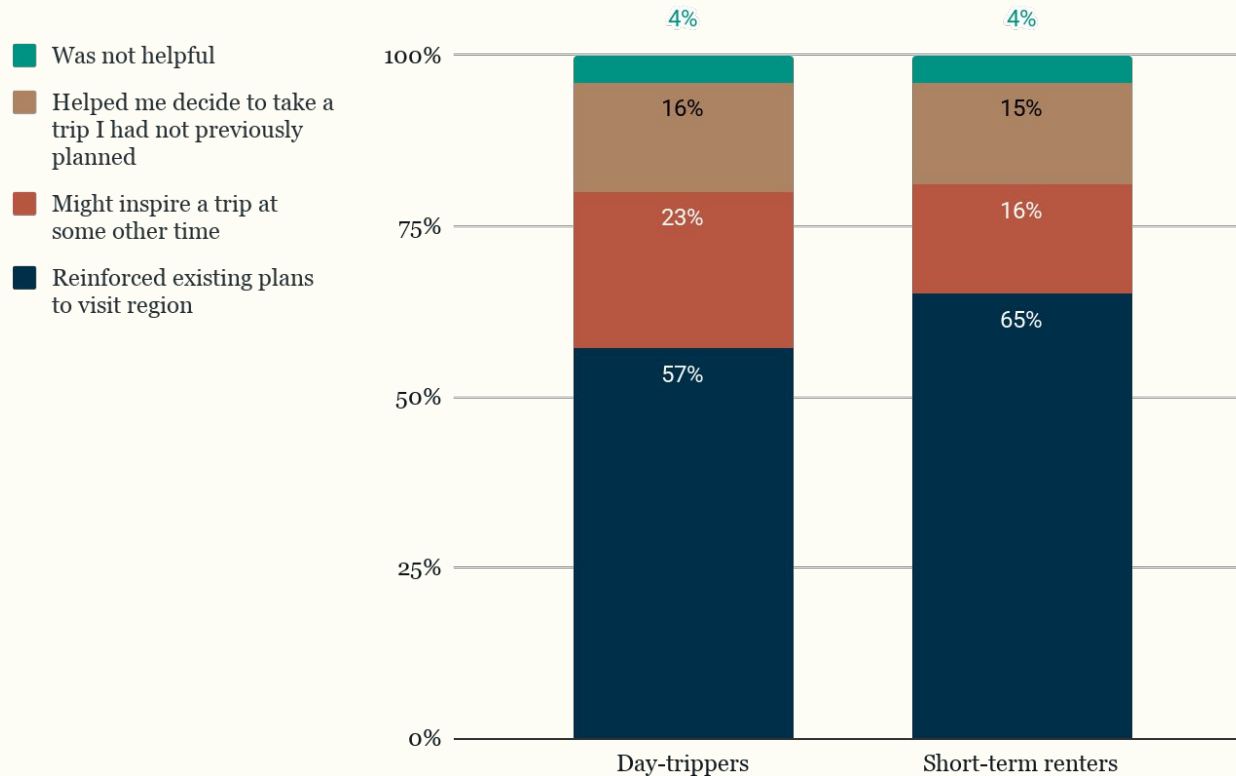
Conversion rate from viewing ROOST marketing materials

By county



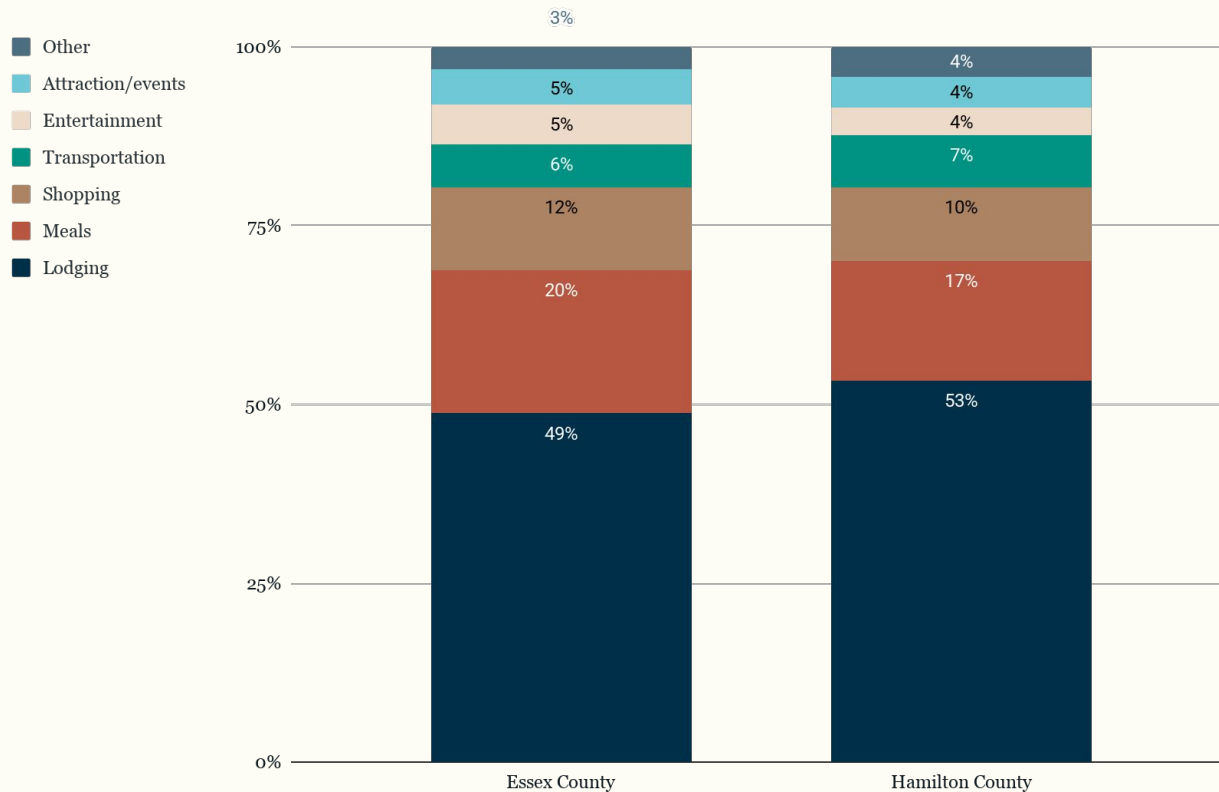
Conversion rate from viewing ROOST marketing materials

Day-trippers / Short-term renters



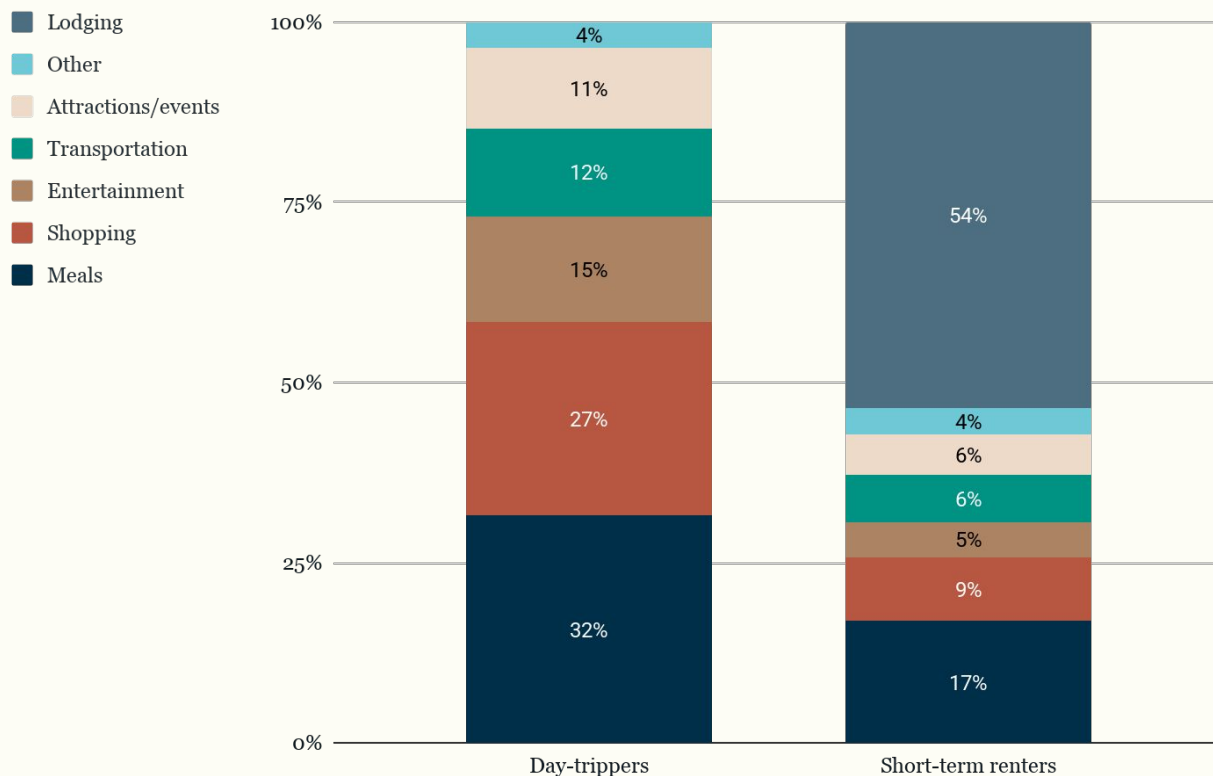
Total expenditure allocation by category

By county



Total expenditure allocation by category

Day-trippers / Short-term renters



Mean party expenditures

By county

	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

Five-year mean party expenditures

Hamilton County

	2021	2022	2023	2024	2025	Five-year average
Lodging	\$527	\$667	\$787	\$819	\$825	\$725
Meals	\$221	\$253	\$254	\$234	\$258	\$244
Shopping	\$174	\$210	\$200	\$135	\$160	\$176
Entertainment	\$63	\$72	\$106	\$53	\$61	\$71
Attractions/events	\$49	\$55	\$75	\$58	\$66	\$61
Transportation	\$86	\$120	\$118	\$95	\$112	\$106
Other	\$42	\$48	\$50	\$50	\$65	\$51
Total daily	\$314	\$375	\$429	\$314	\$309	\$348
Total trip	\$1,162	\$1,425	\$1,590	\$1,444	\$1,547	\$1,434

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 was \$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.

Hamilton County Visitor Profile



Visitor profile

Hamilton County

- 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.

Visitor profile

Hamilton County

- 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 heavy June visitation.
- Camping/RV continued to be the most reported lodging choice among visitors, increasing to 29%. Hotel/motel visitation was the second most cited accommodation choice.

Visitor profile

Hamilton County

- 18% and 14% of respondents, respectively, selected second home use and short-term rentals. Thirteen percent of respondents reported staying with family and friends.
- 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.
- 11% reported interest in heritage sites, 9% reported interest in arts and entertainment (an increase from recent years data) and 8% in events.

Visitor profile

Hamilton County

- 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 snowshoeing, and skiing/boardng 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.
- 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.

Visitor profile

Hamilton County

- 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).

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 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/boardings, 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.

Regional Visitor Impacts



Regional visitor impacts

All travelers

- 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.

Regional visitor impacts

All travelers

- 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.

Regional visitor impacts

All travelers

- 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.

Regional visitor impacts

All travelers

- 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.

Regional visitor impacts

All travelers

- 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 occurred in early 2026. Reported interest in events (16%) also increased slightly (from 13%) from prior year.

Regional visitor impacts

All travelers

- 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.
- 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 hiking (an increase from year prior to 33%), and 25% family hikes.
- 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”.

Regional visitor impacts

All travelers

- 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 was \$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.

Regional visitor impacts

All travelers

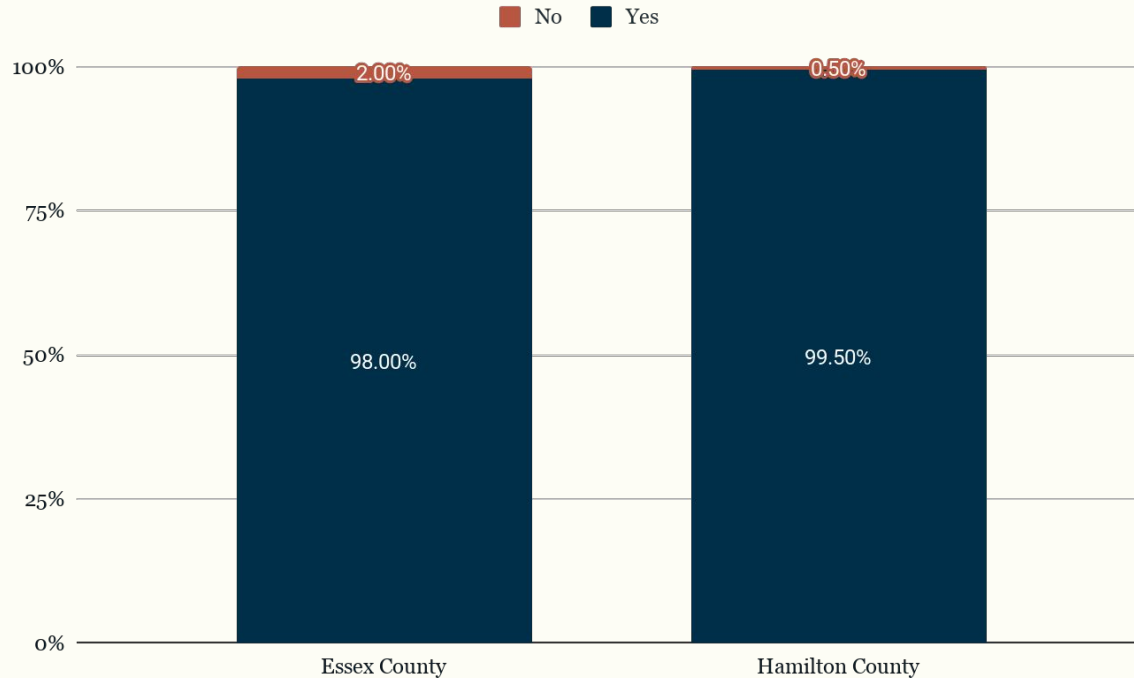
- Other expenditure categories (shopping, entertainment, events, transportation) remained consistent from the prior year, with entertainment and events showing small increases.
- Conversion measurement, representing the percentage of travelers who stated that the information or marketing materials reviewed 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%.

Regional Visitor Sentiment



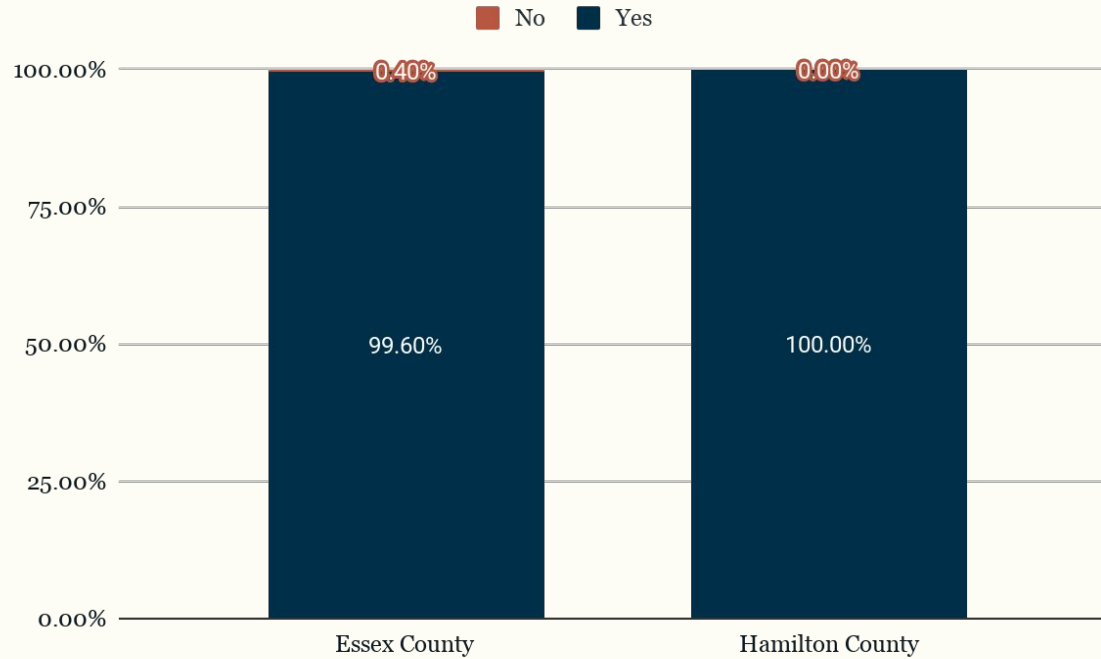
Regional visitor sentiment

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



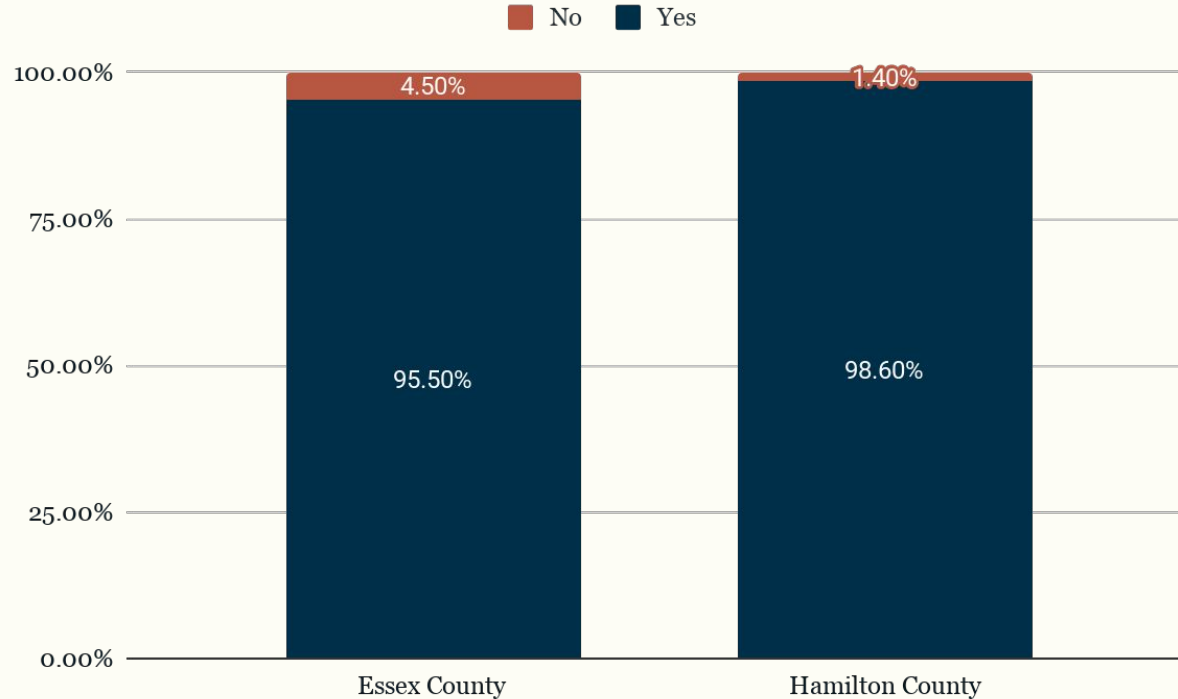
Regional visitor sentiment

Question: Would you like to return in the future?



Regional visitor sentiment

Question: Did your trip meet your budget expectations?



Regional ROI Study



Return on investment (ROI)

All travelers

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:

216,713 (direct leads)
X 84% (gross conversion factor)
X \$445 (mean traveler party expenditure per day)
X 4.3 (mean length of stay in nights)

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2025 is **\$348,331,473**

Return on investment (ROI)

All travelers

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:

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

(*total ROOST marketing expenditures*)

*Return on Investment (ROI) = **96:1***