

An aerial photograph of a serene landscape. In the foreground, a winding, light-colored path or stream meanders through a lush green field. The field is dotted with small, dark shrubs. In the background, a large body of water, likely a lake, is partially obscured by a thick layer of white mist or fog. The lake is surrounded by dense, dark green forests. In the far distance, rolling hills or mountains are visible under a soft, hazy sky with a hint of pink and blue, suggesting dawn or dusk.

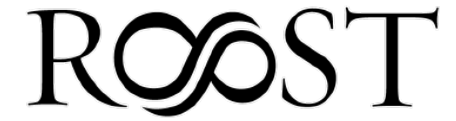
Leisure Travel Study

Lake Placid, Essex and Hamilton Counties,
Saranac Lake, and Tupper Lake

2022 COUNTY VISITOR PROFILES AND REGIONAL
RETURN ON MARKETING INVESTMENT ANALYSIS

ROOST

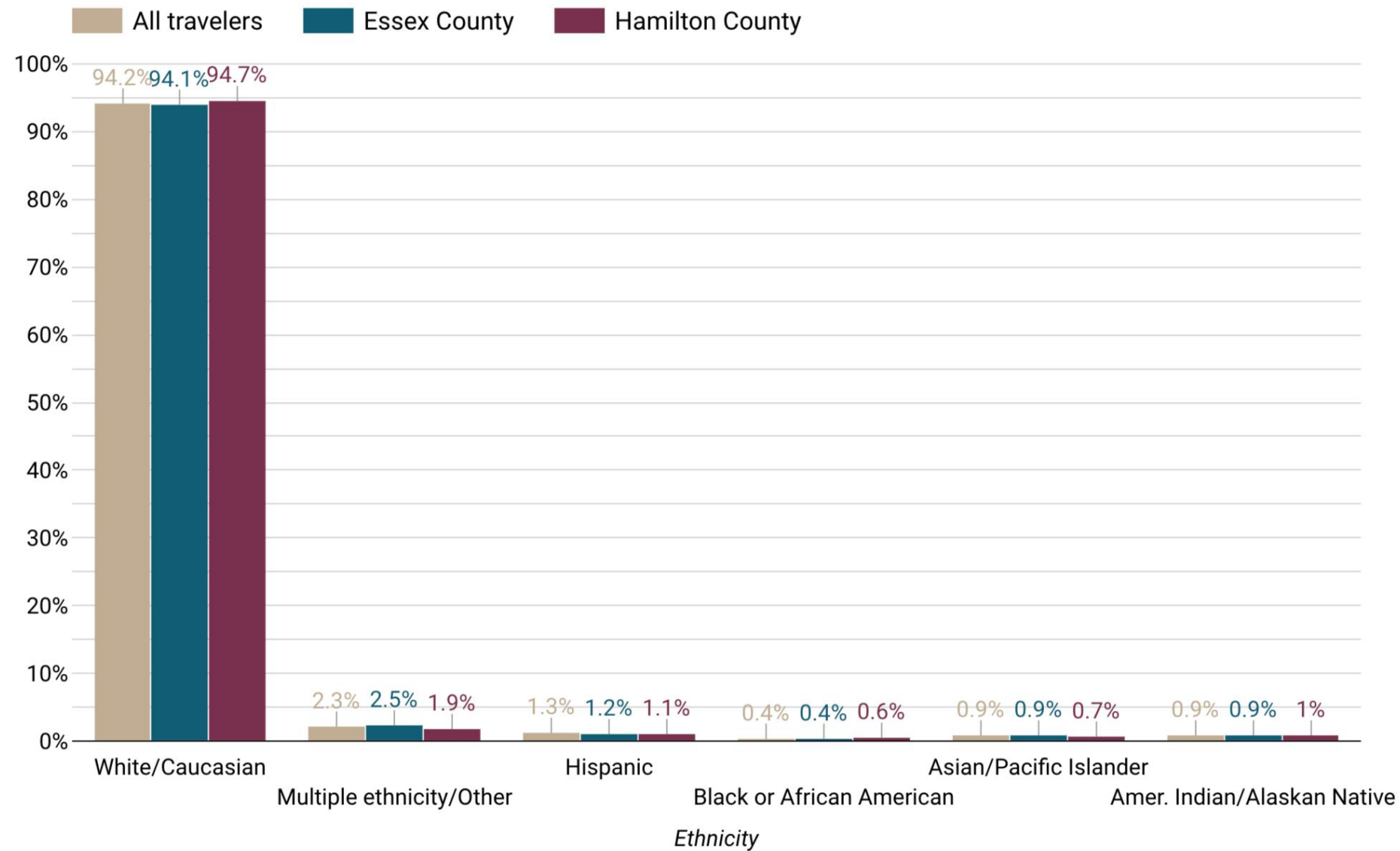
Project background and methodology



- 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 tool to a sample of its 2022 leisure travelers to the region. Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from visitors who spent most of their time in the region.
- Results from 2022 visitation saw a return to more normal activities for visitors following two heavily impacted pandemic years.
- The end product of 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 a total of 215,944 traceable leads who were interested in visiting the region in 2022. 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 available under a separate cover.

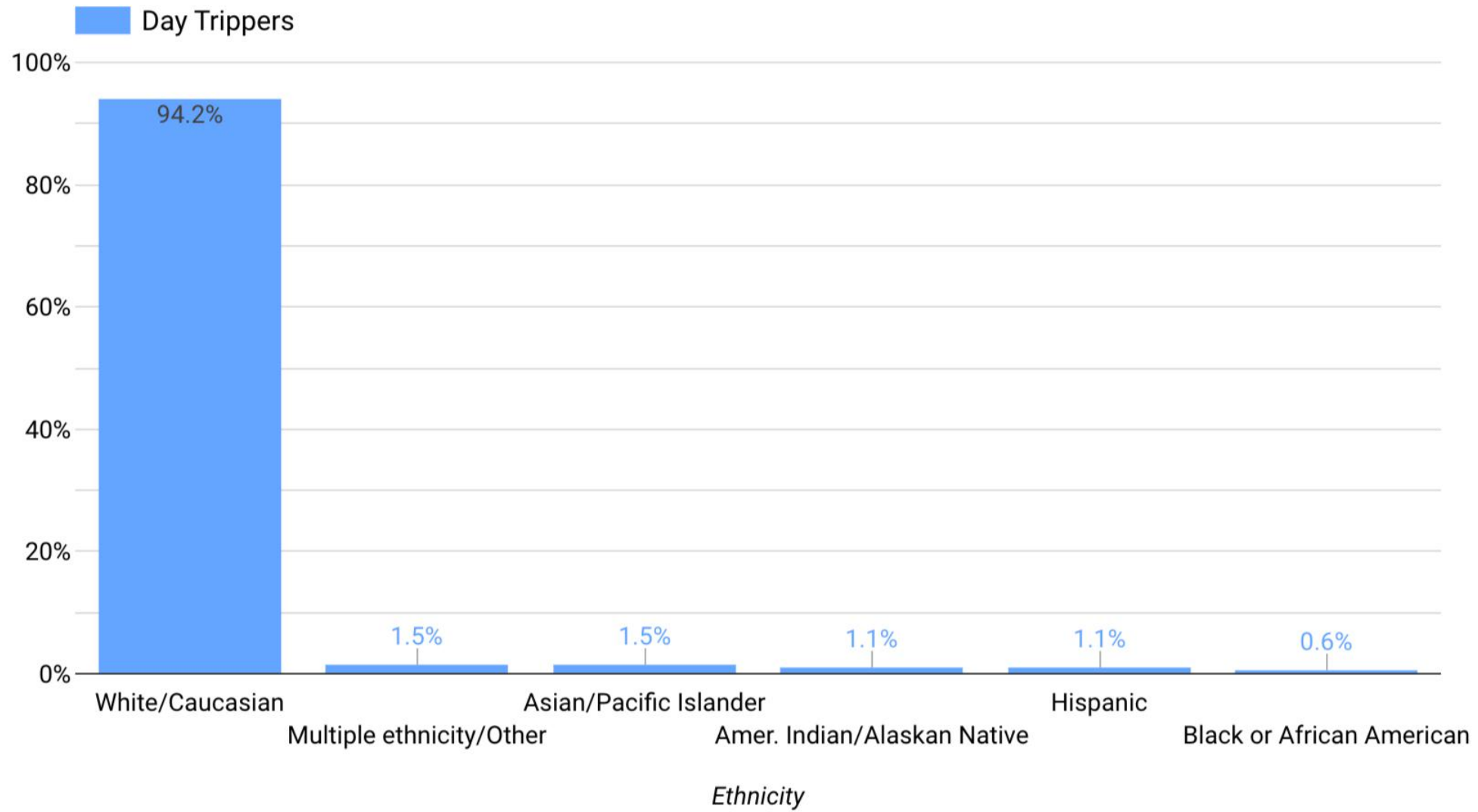
Ethnicity

All travelers



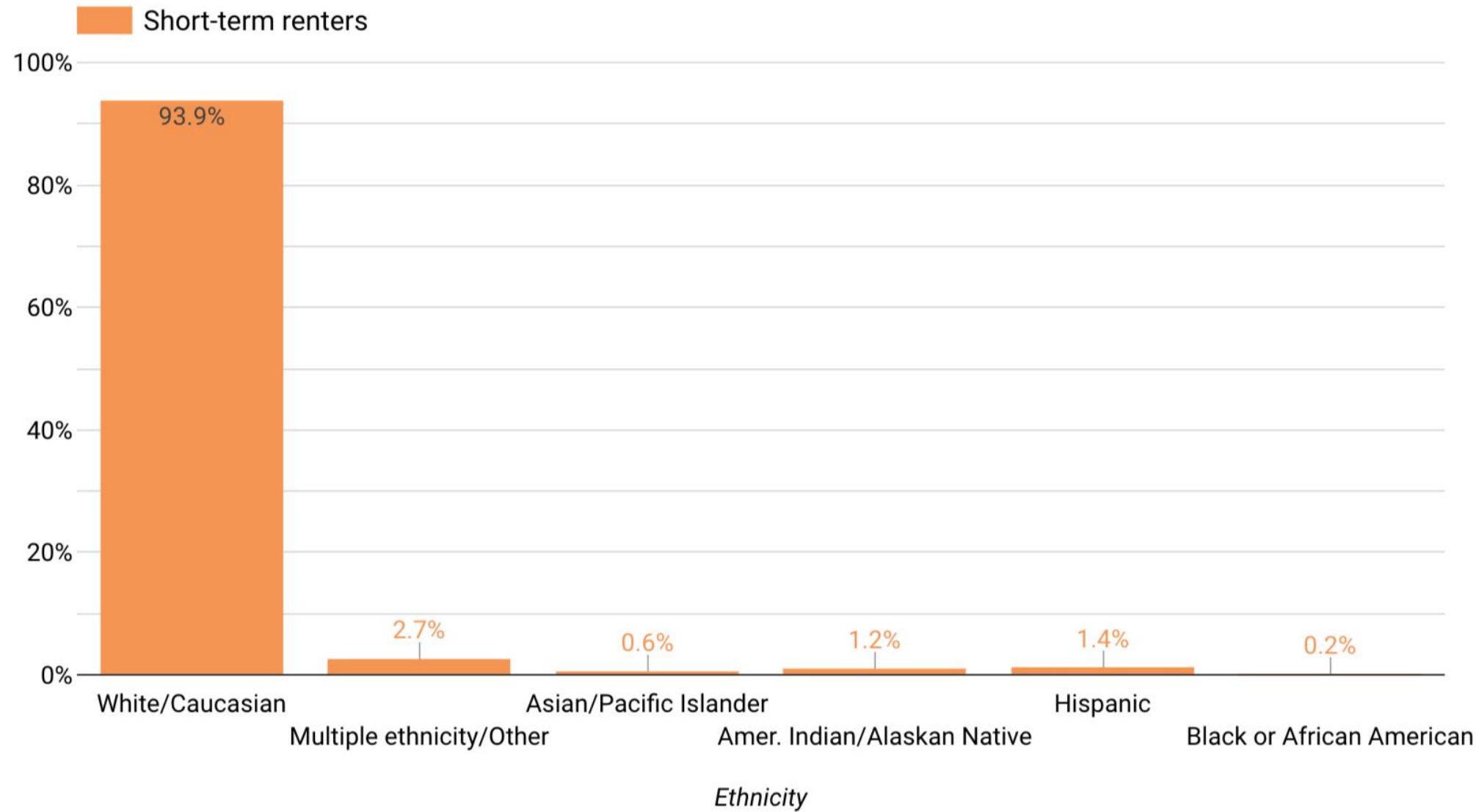
Ethnicity

Day trippers



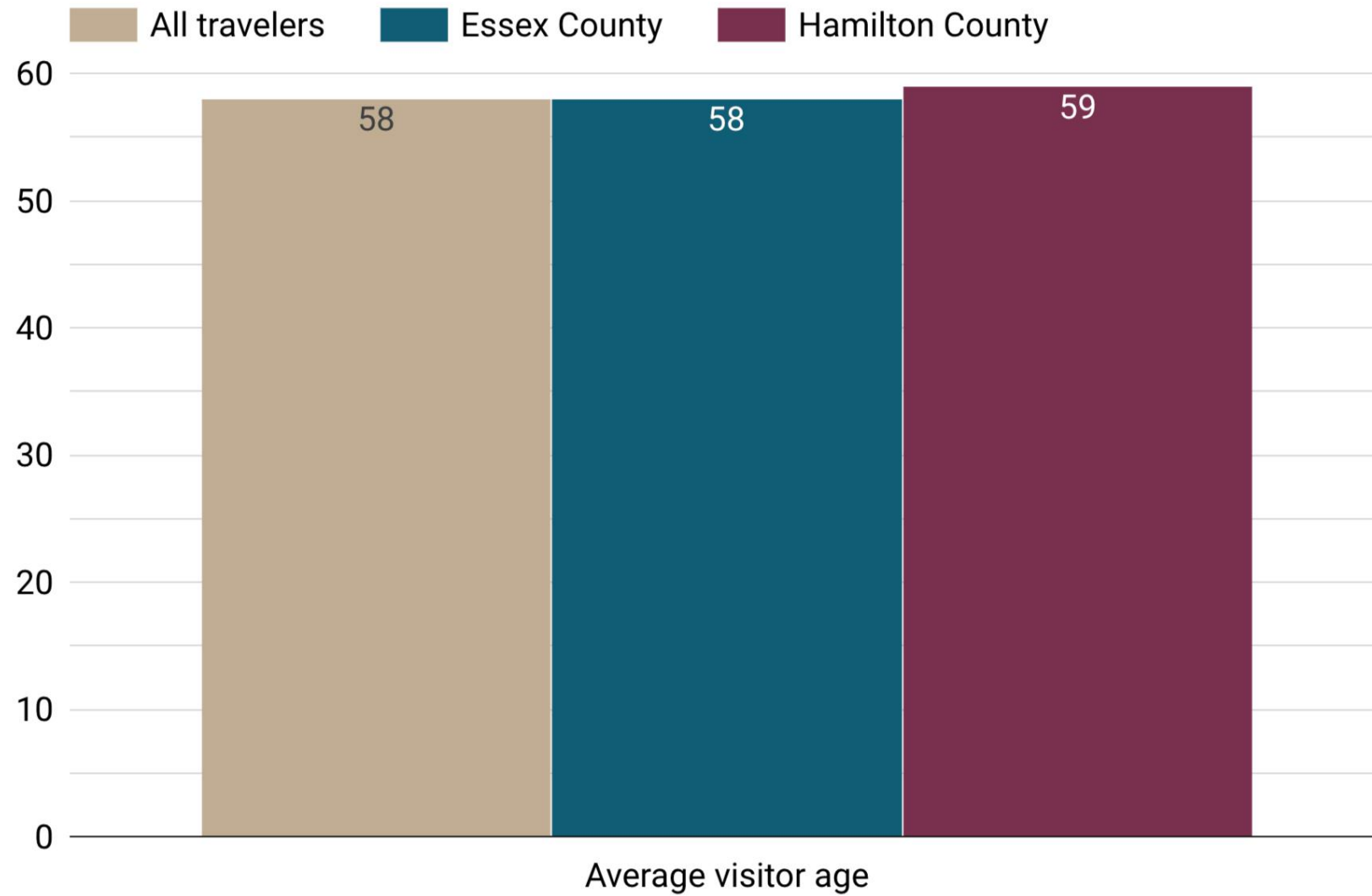
Ethnicity

Short-term renters



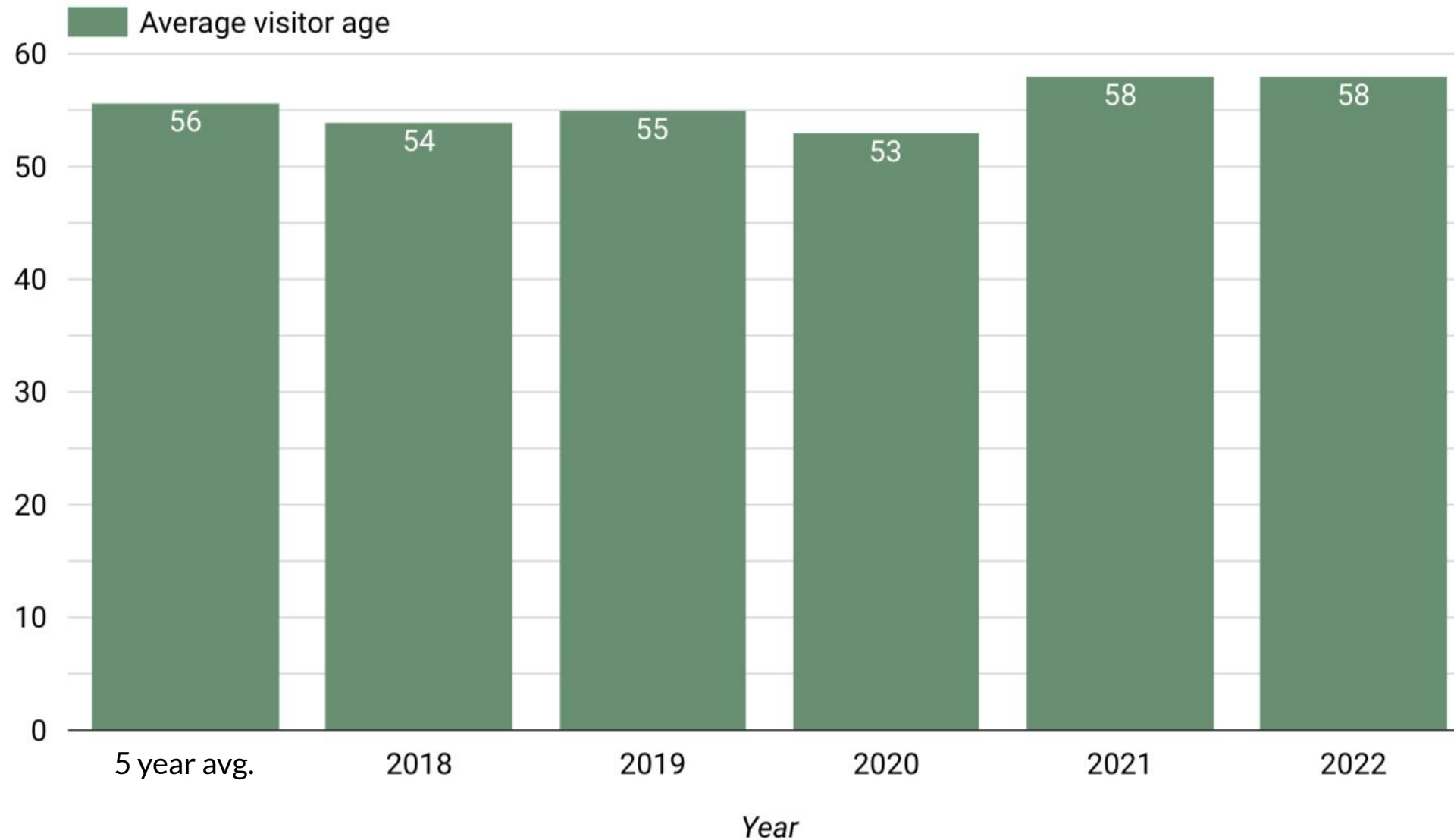
Average age

All travelers



Five year average age

Essex County travelers



Average age

Day trippers



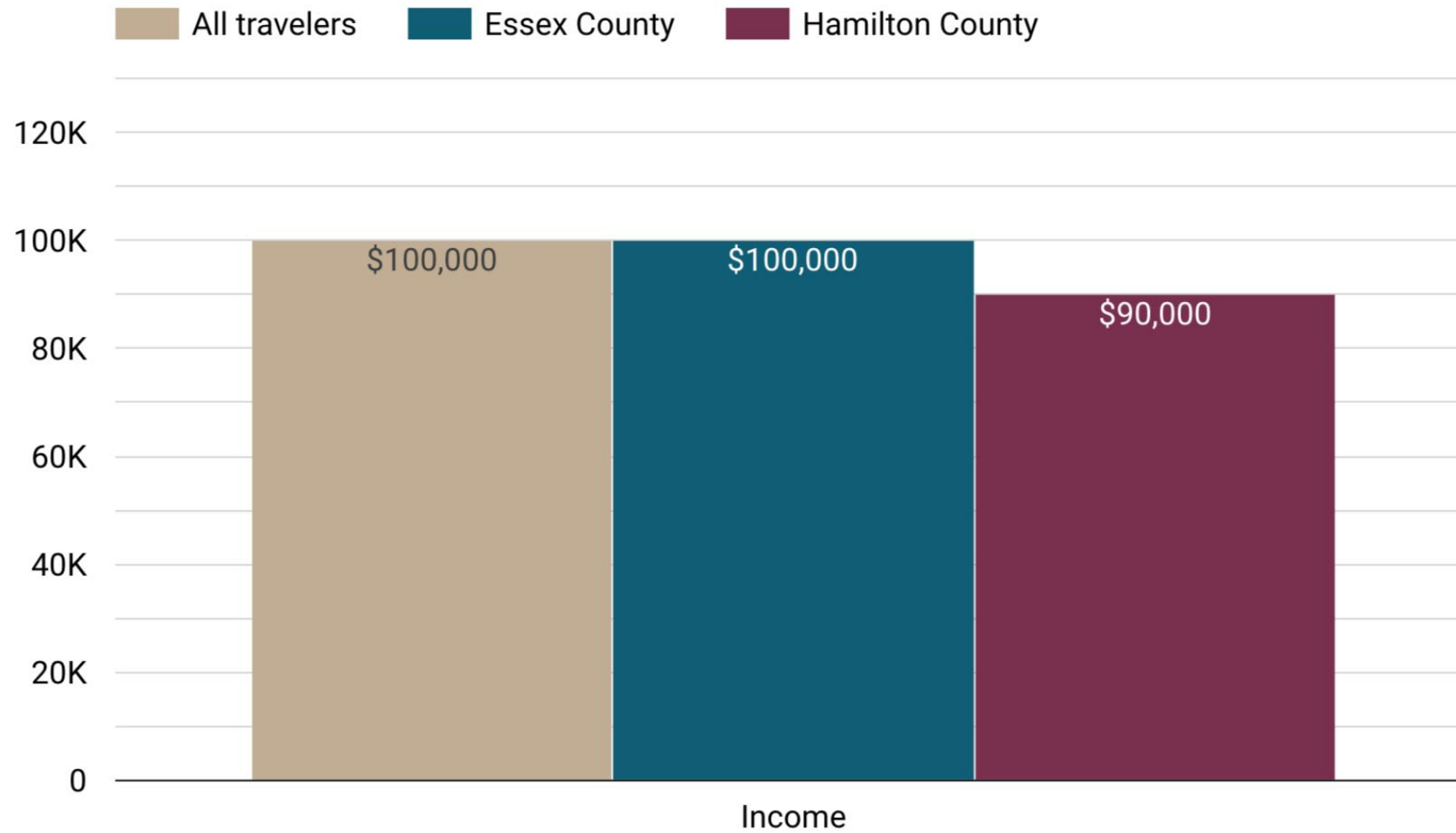
Average age

Short-term renters



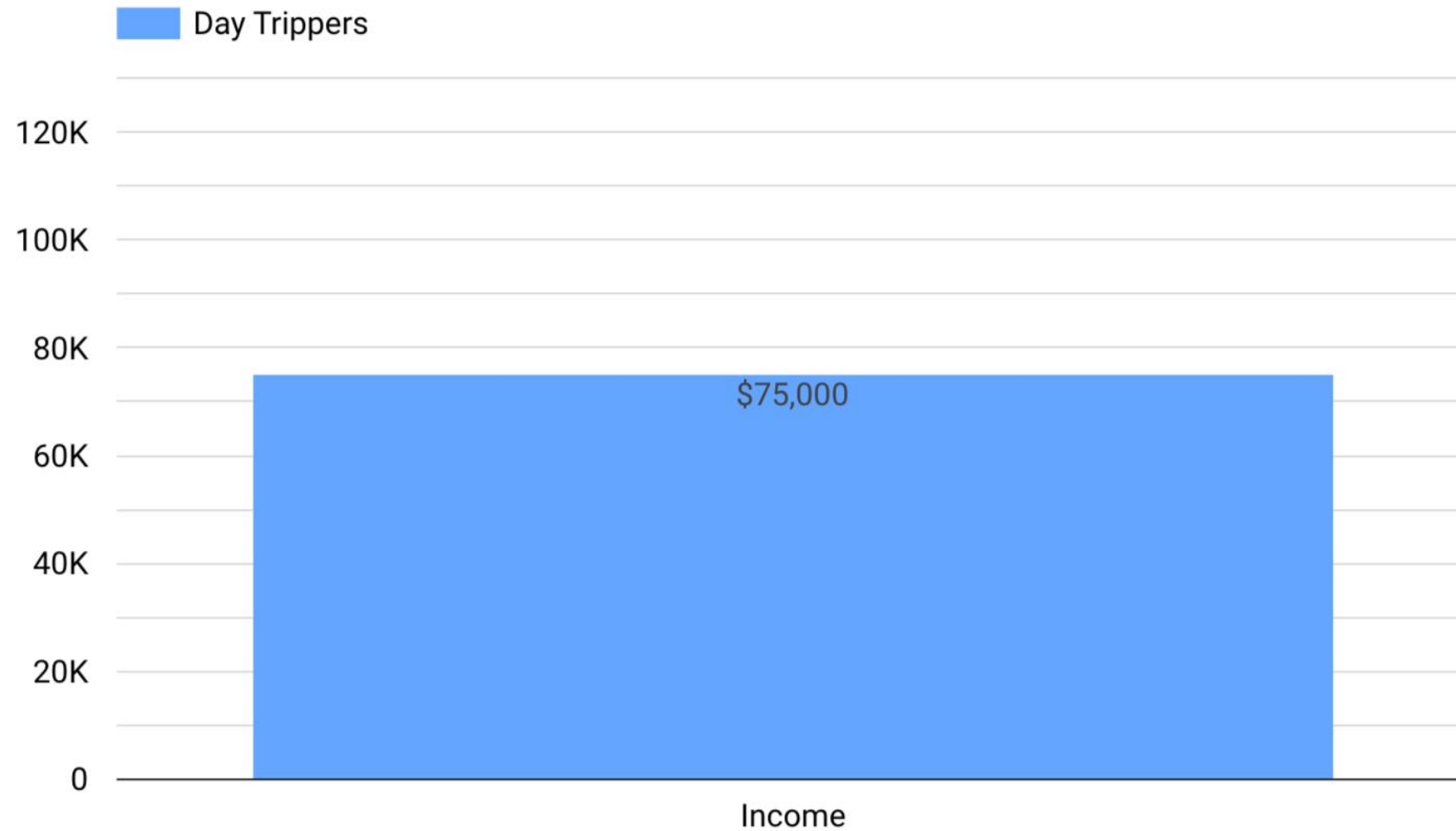
Average income

All travelers



Average income

Day trippers



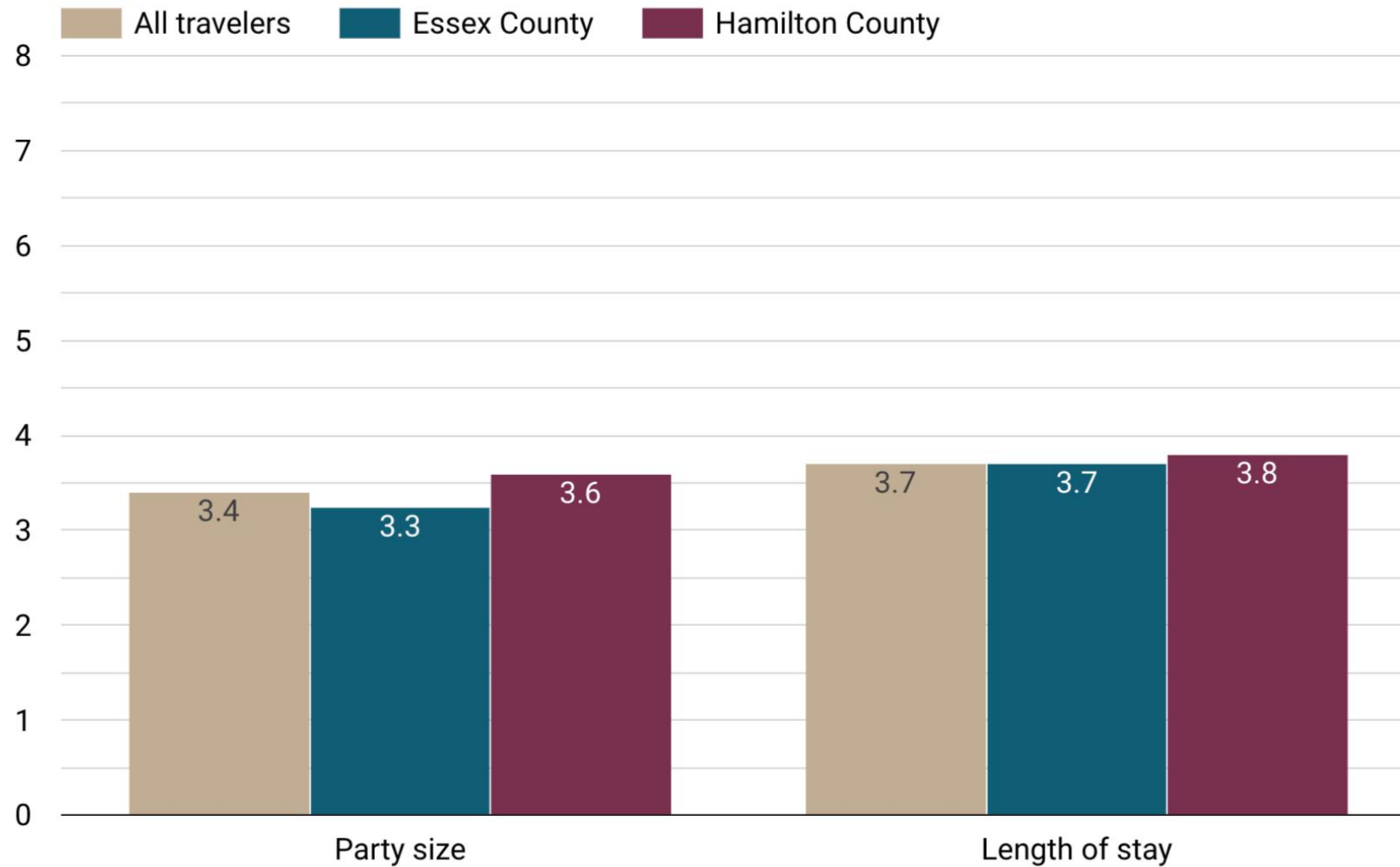
Average income

Short-term renters



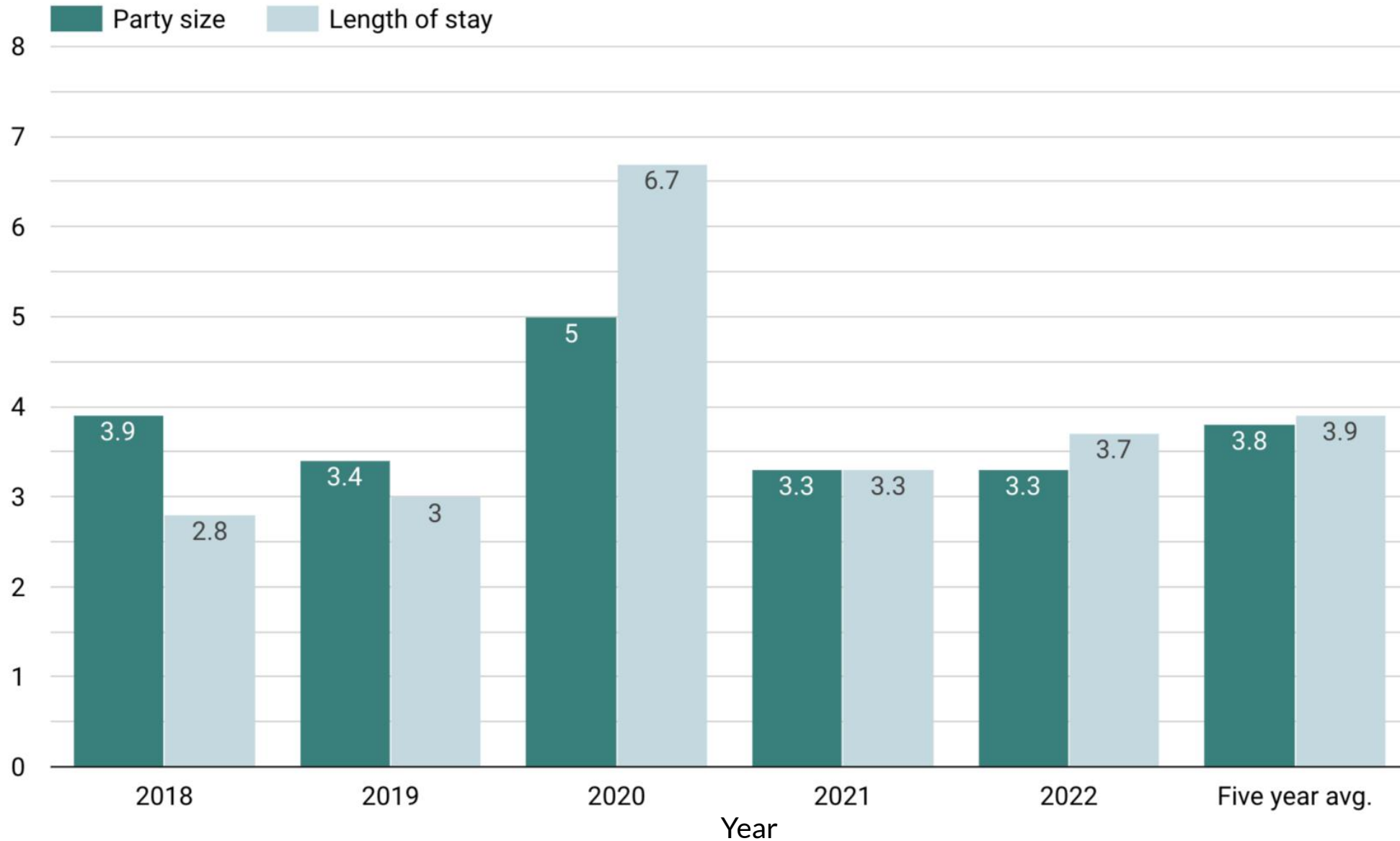
Party size / Length of stay

All travelers



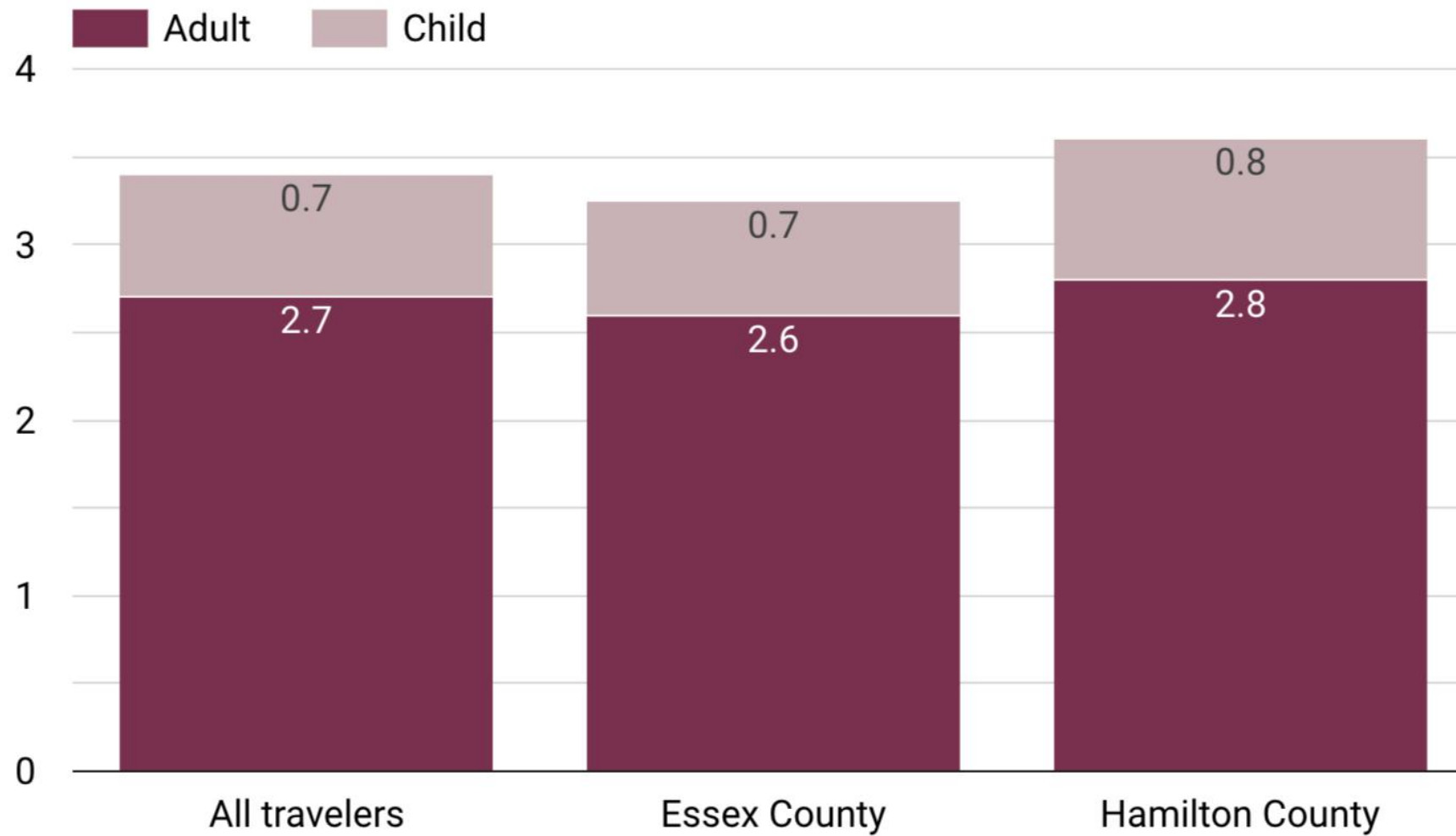
Five year average party size / Length of stay

Essex County travelers



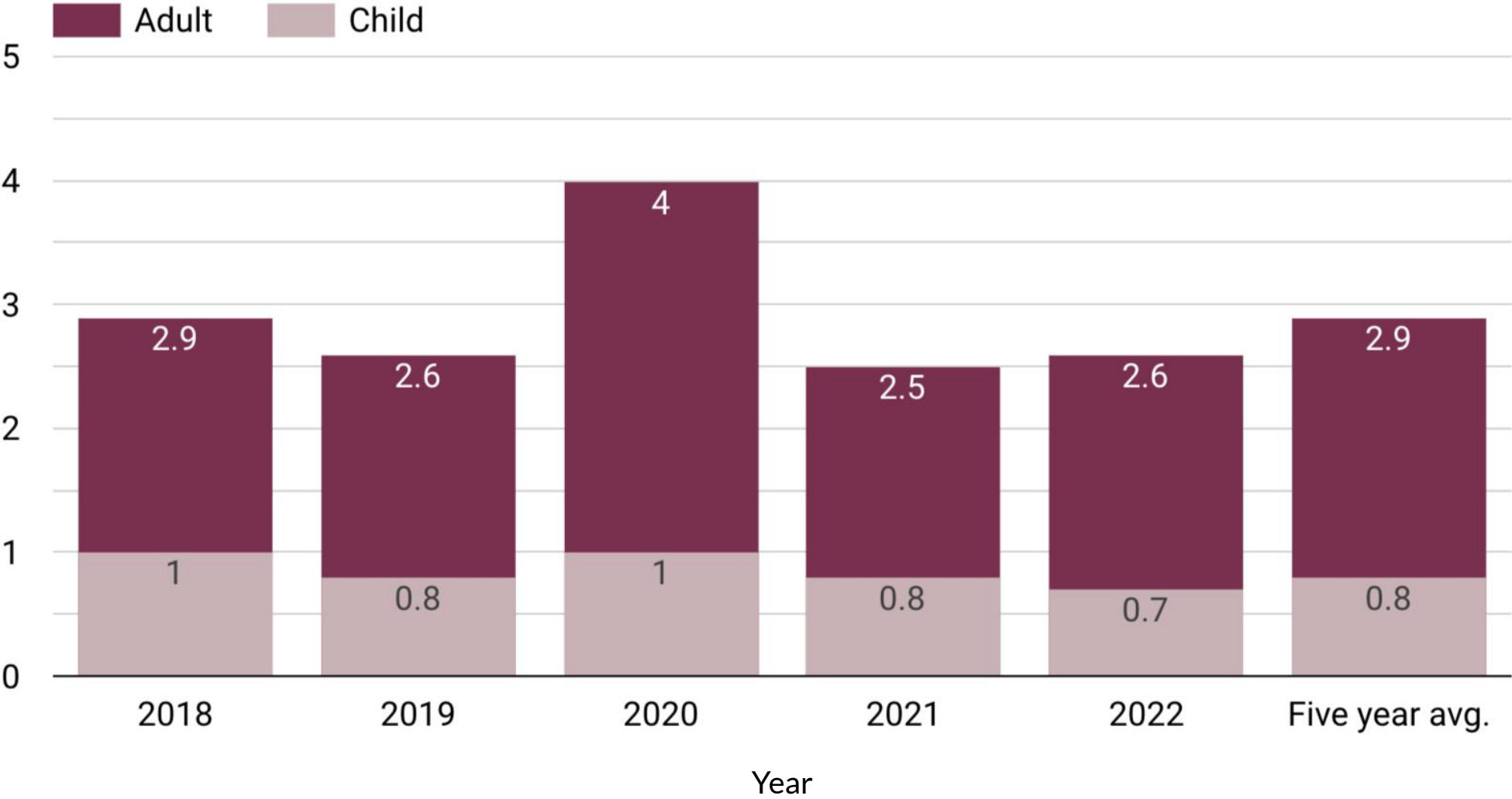
Party composition

All travelers



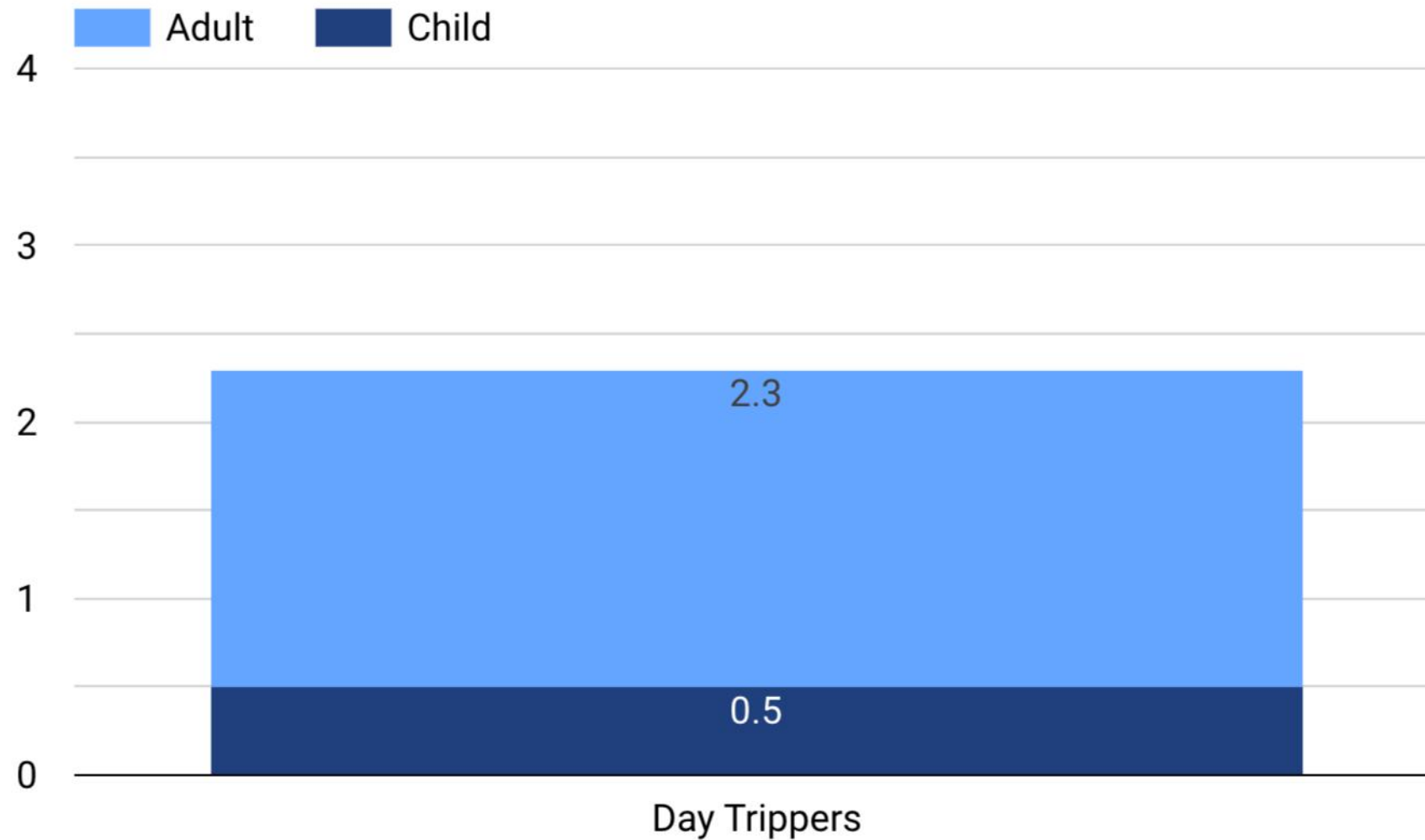
Five year average party composition

Essex County travelers



Party composition

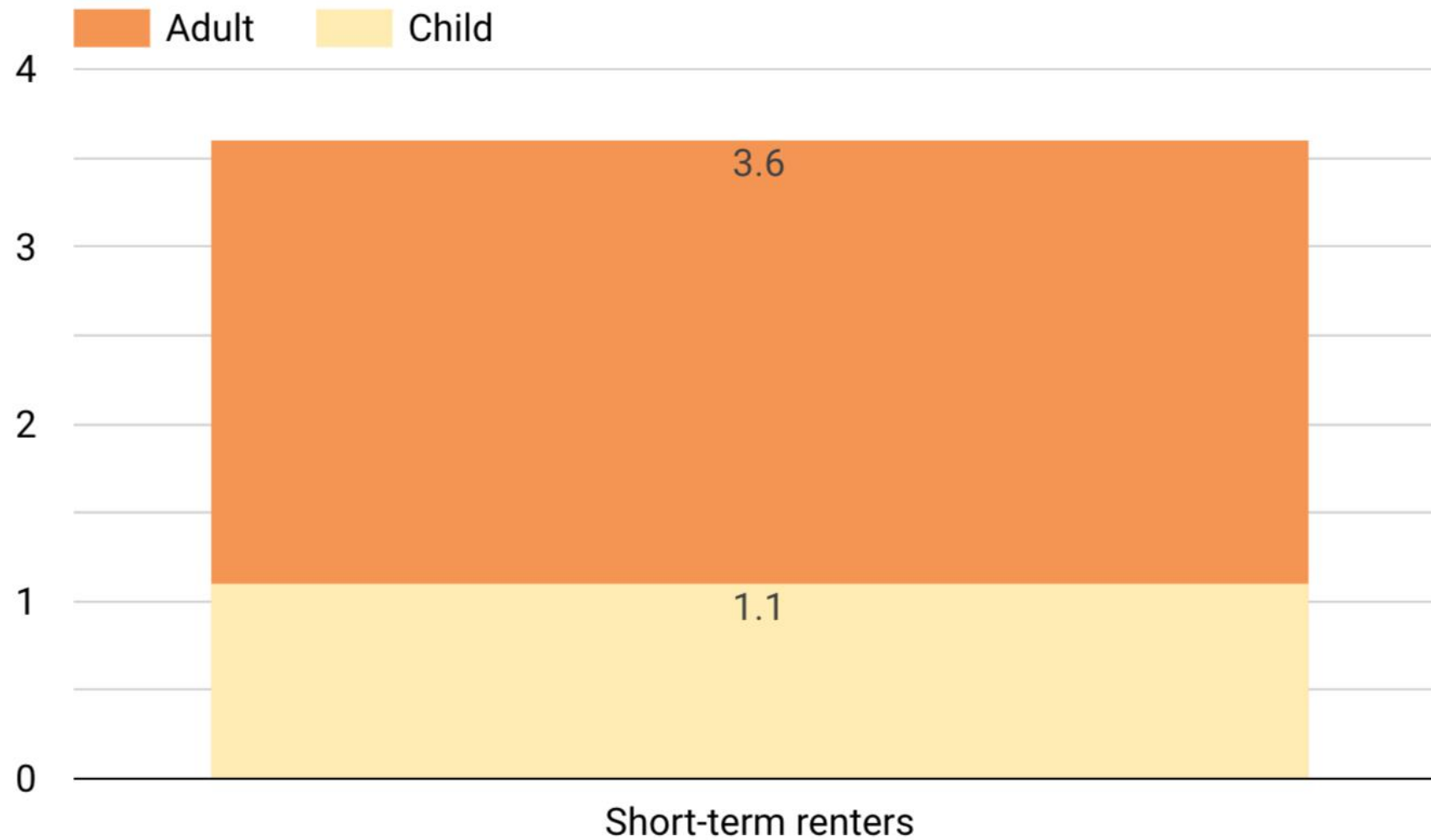
Day trippers



Party composition

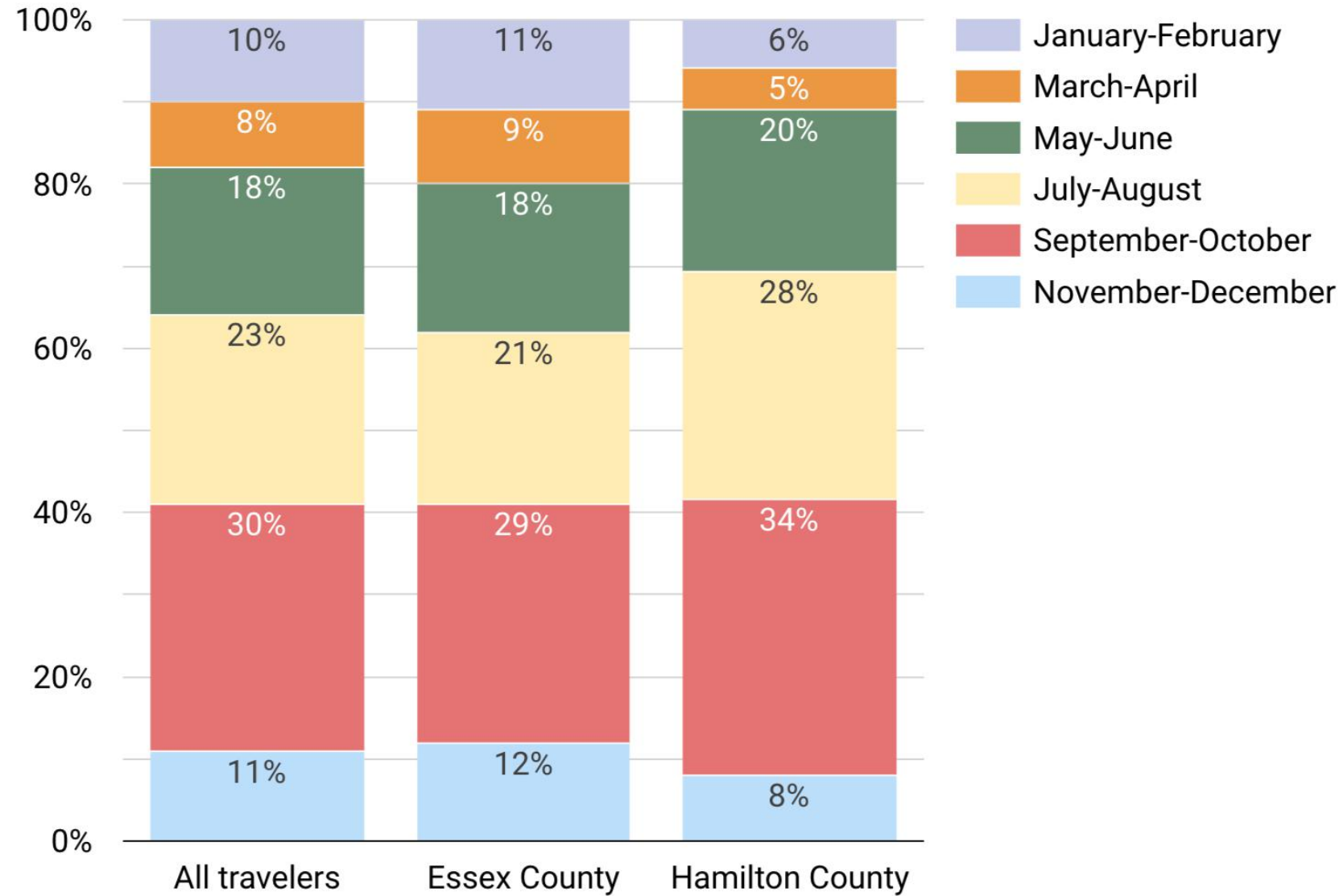
Short- term renters

ROOST



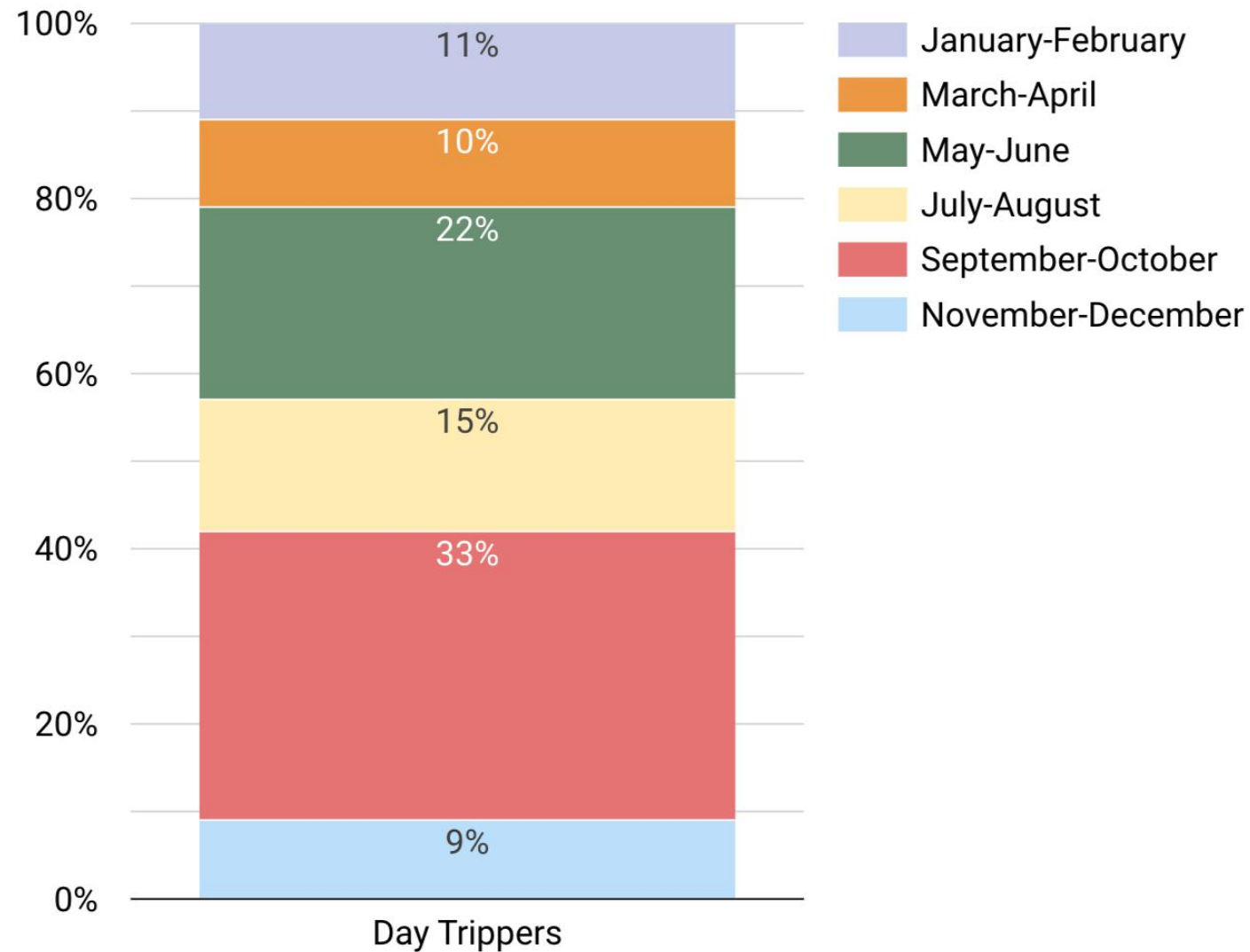
Time of year visited

All travelers



Time of year visited

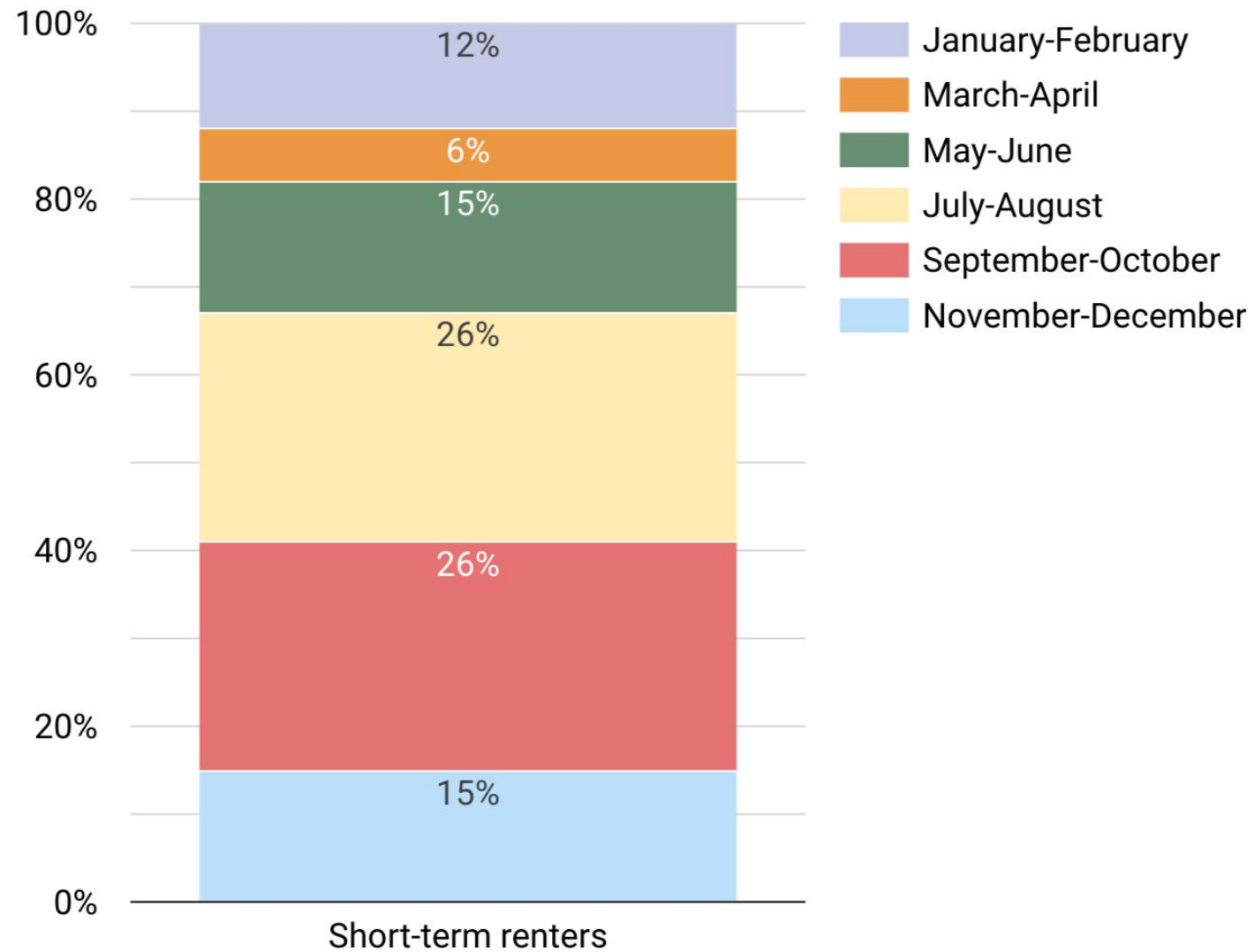
Day trippers



Time of year visited

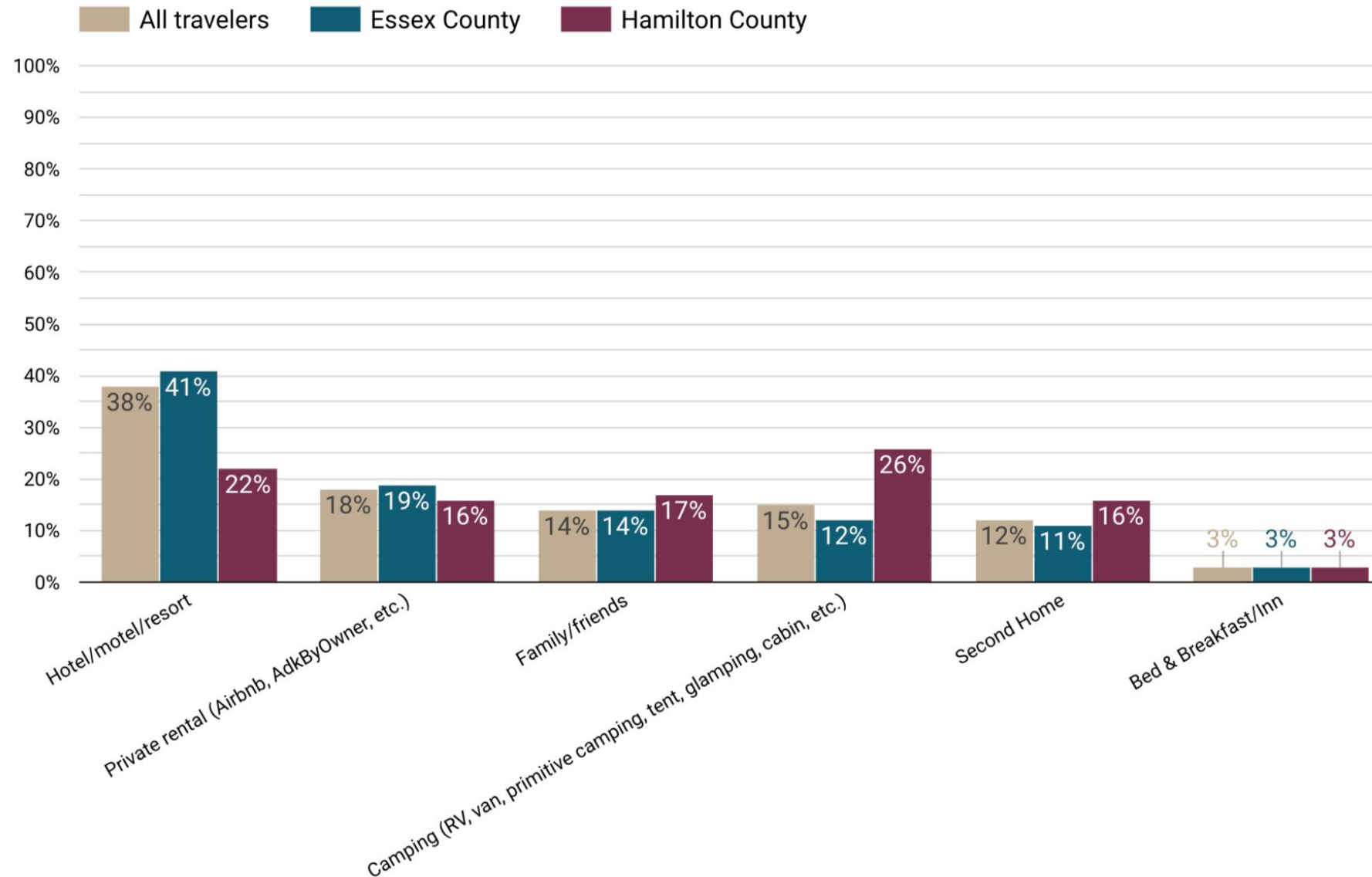
Short-term renters

ROOST



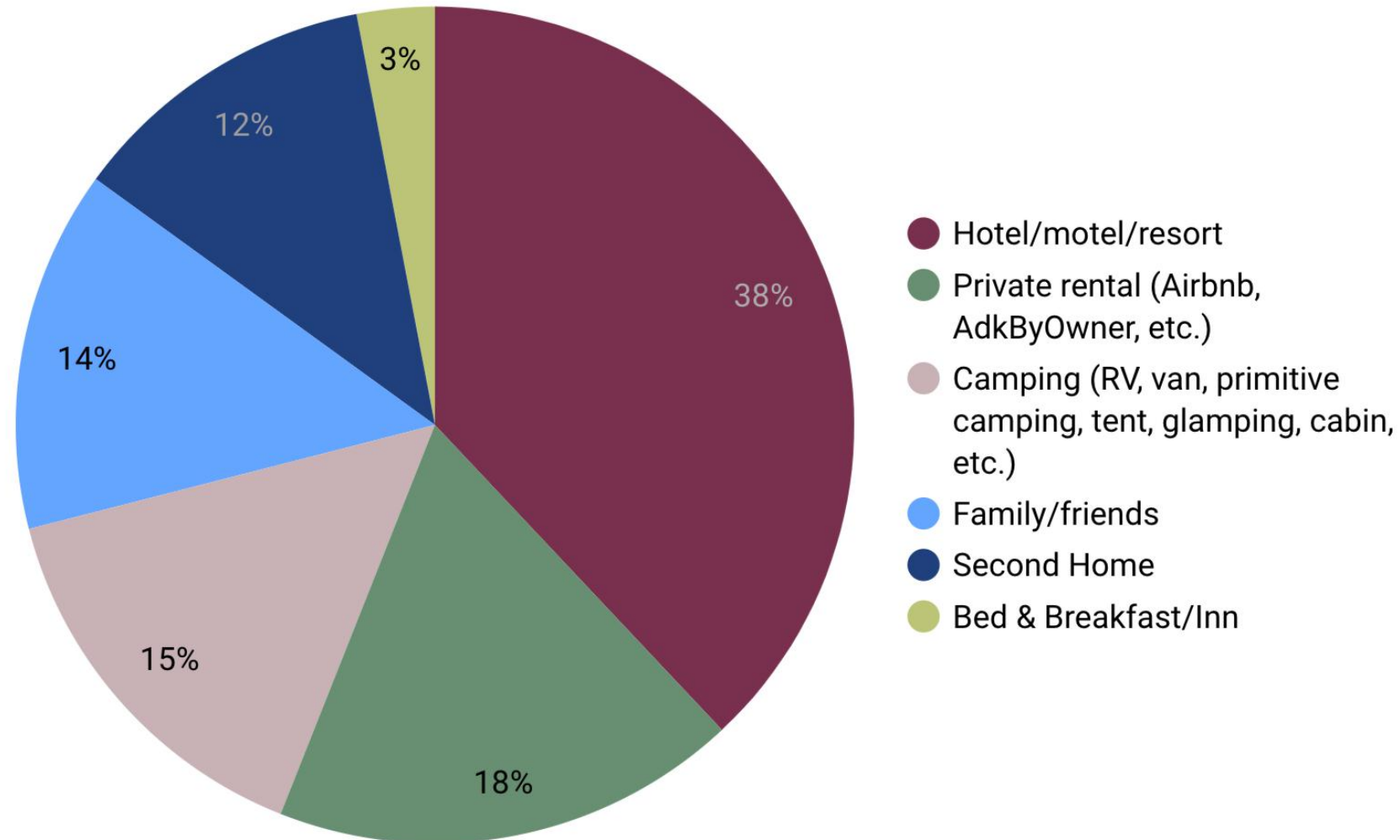
Lodging accommodations

All travelers



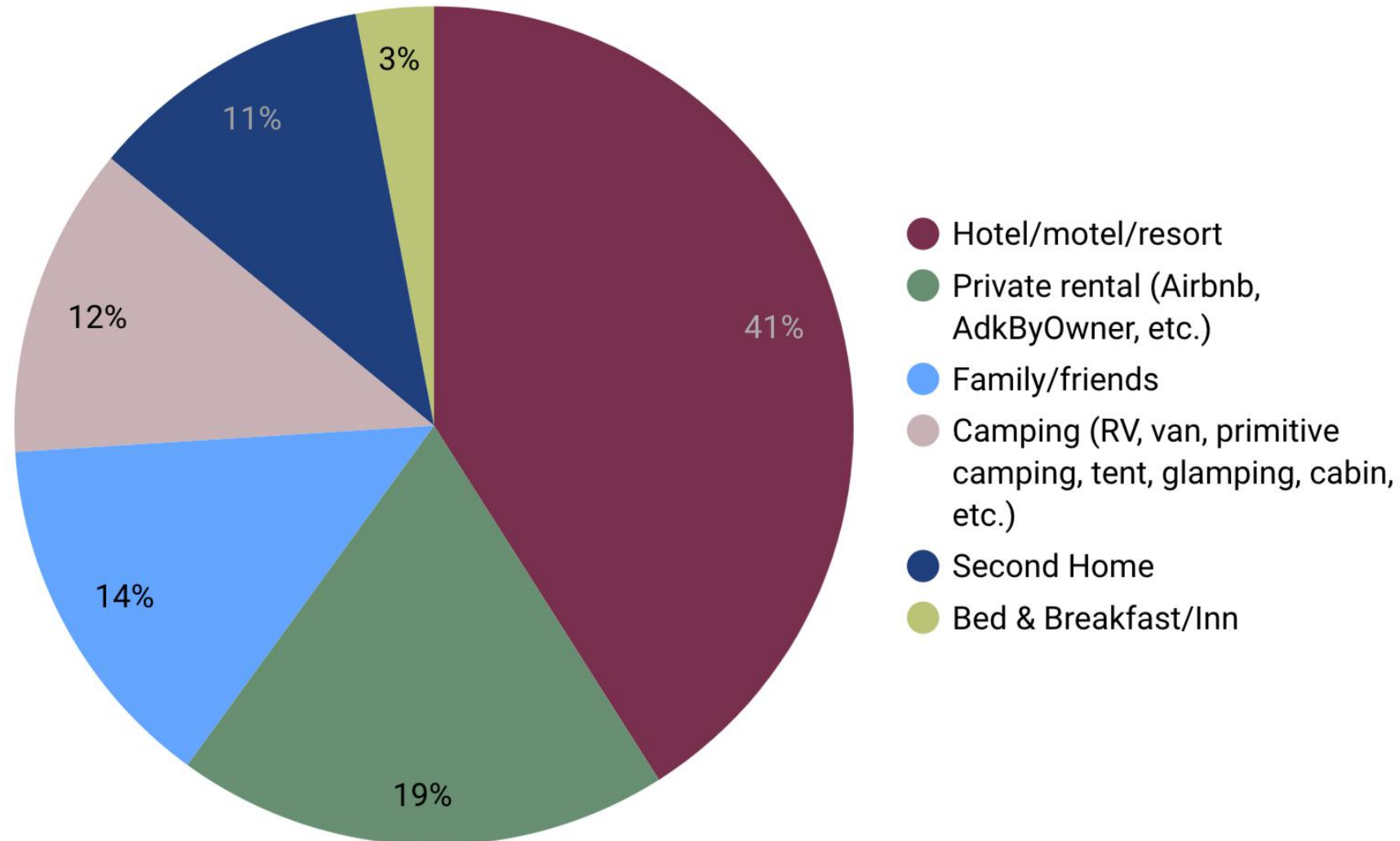
Lodging accommodations

All travelers



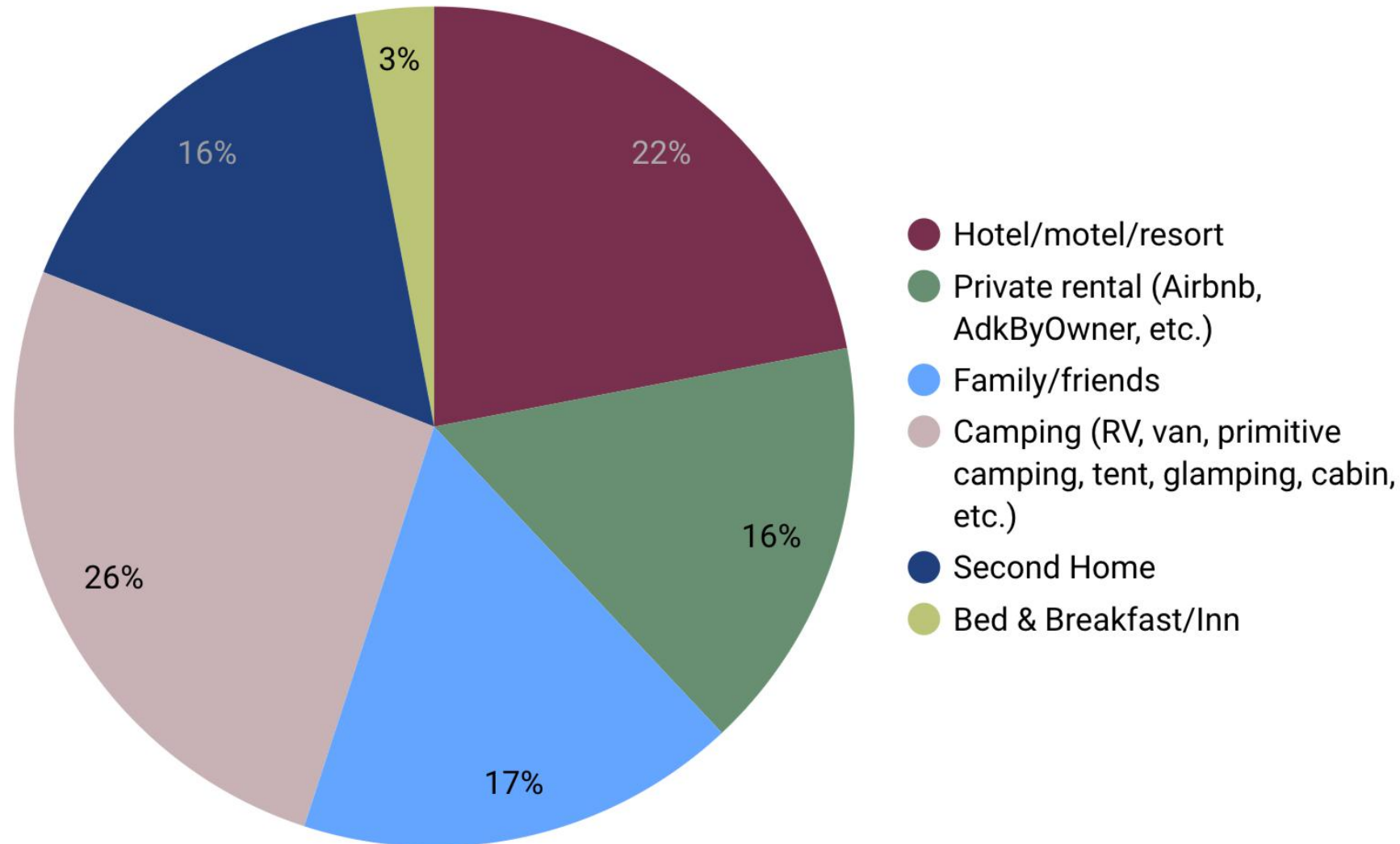
Lodging accommodations

Essex County travelers



Lodging accommodations

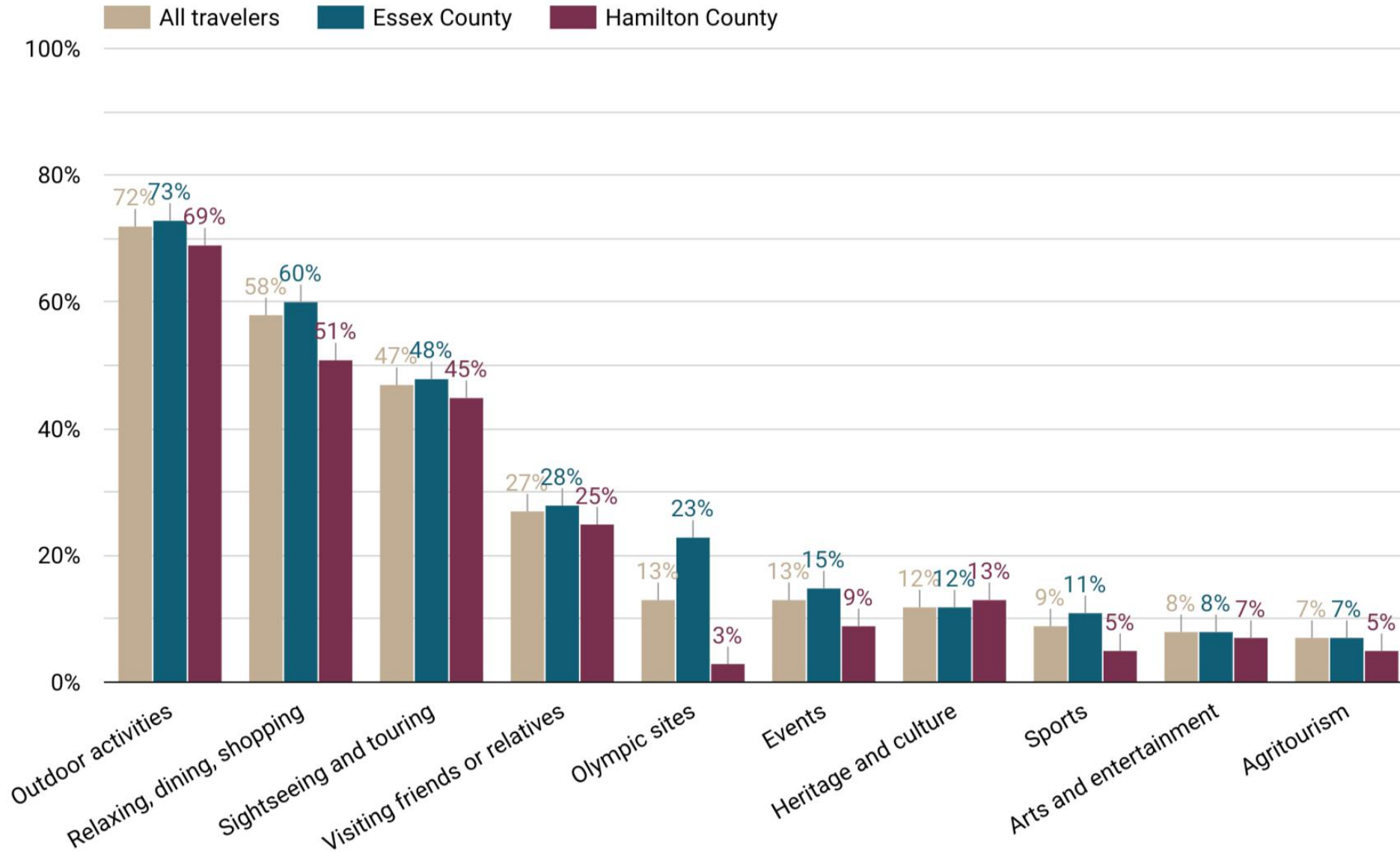
Hamilton County travelers



Key attractions

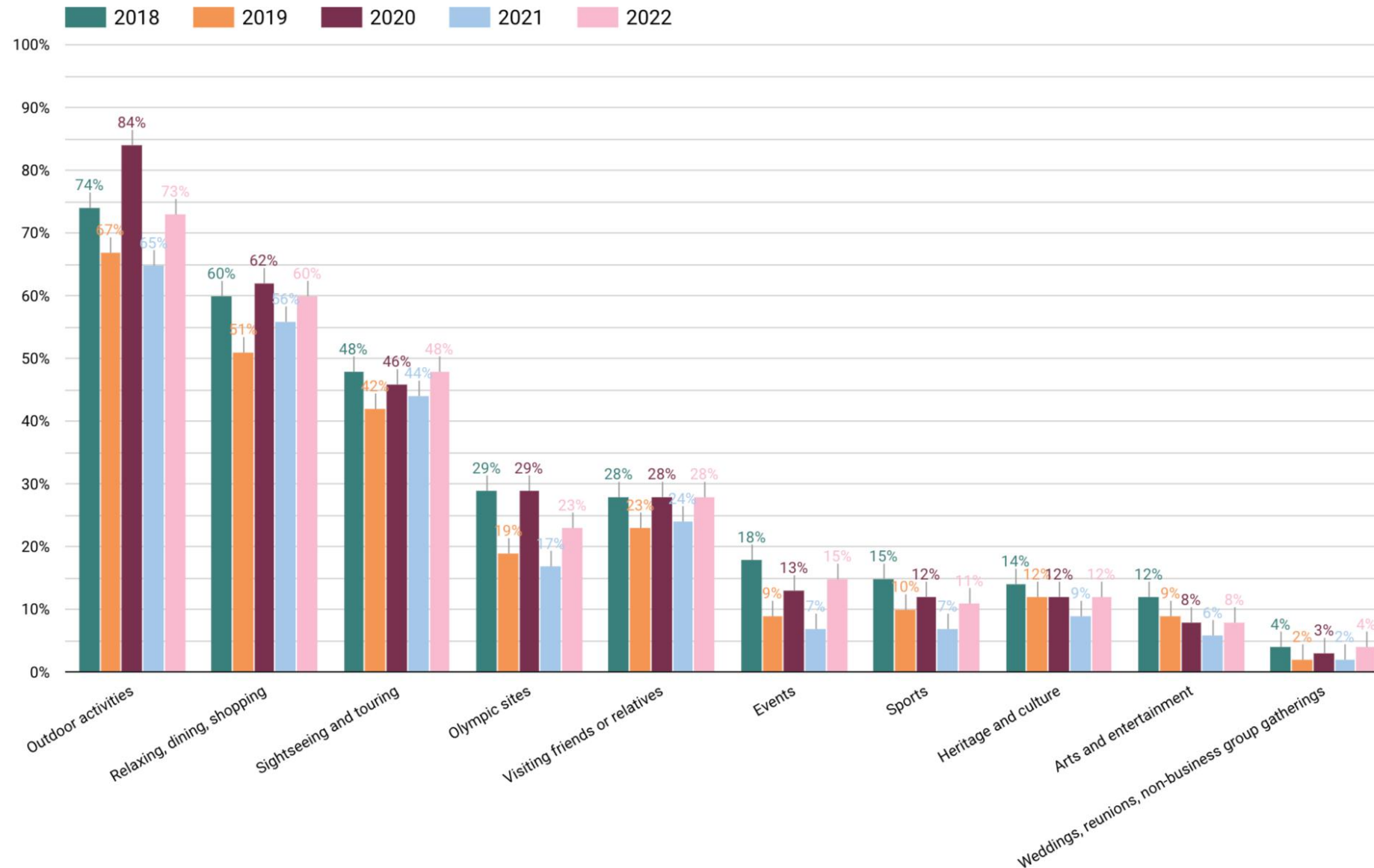
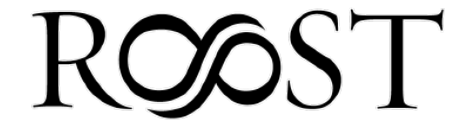
All travelers

ROOST



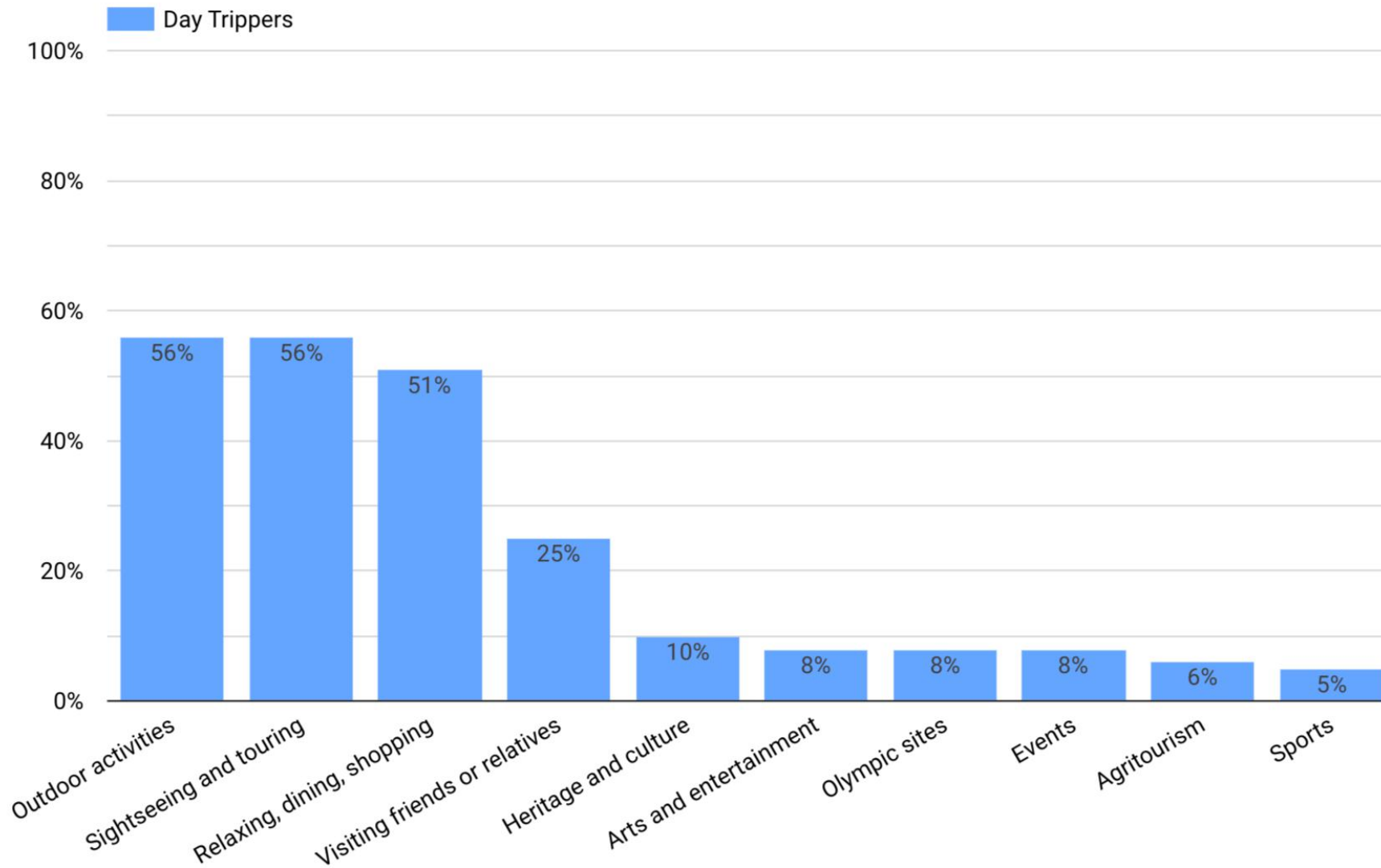
Five year key attractions

Essex County travelers



Key attractions

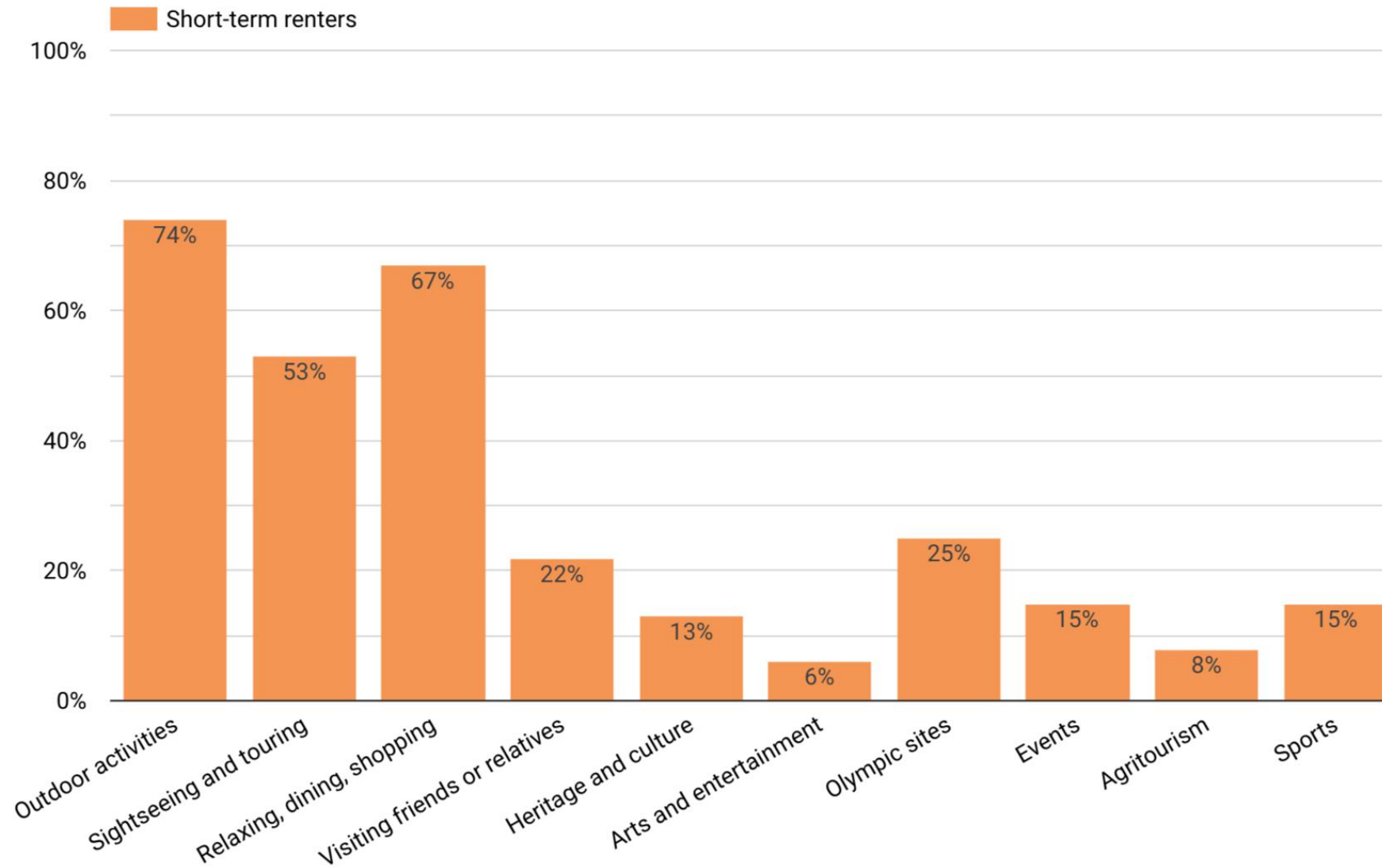
Day trippers



Key attractions

Short-term renters

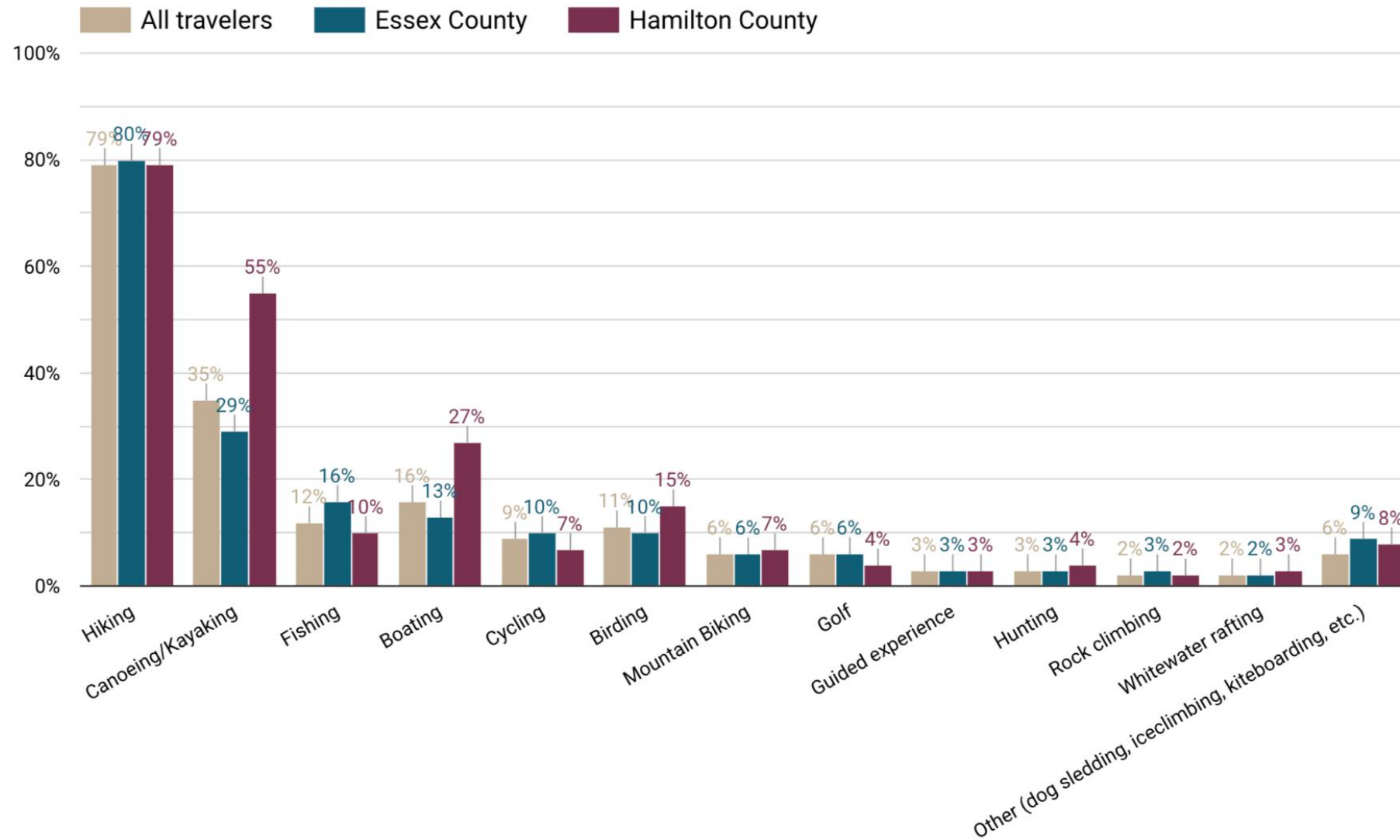
ROOST



Outdoor Spring / Summer activities

All travelers

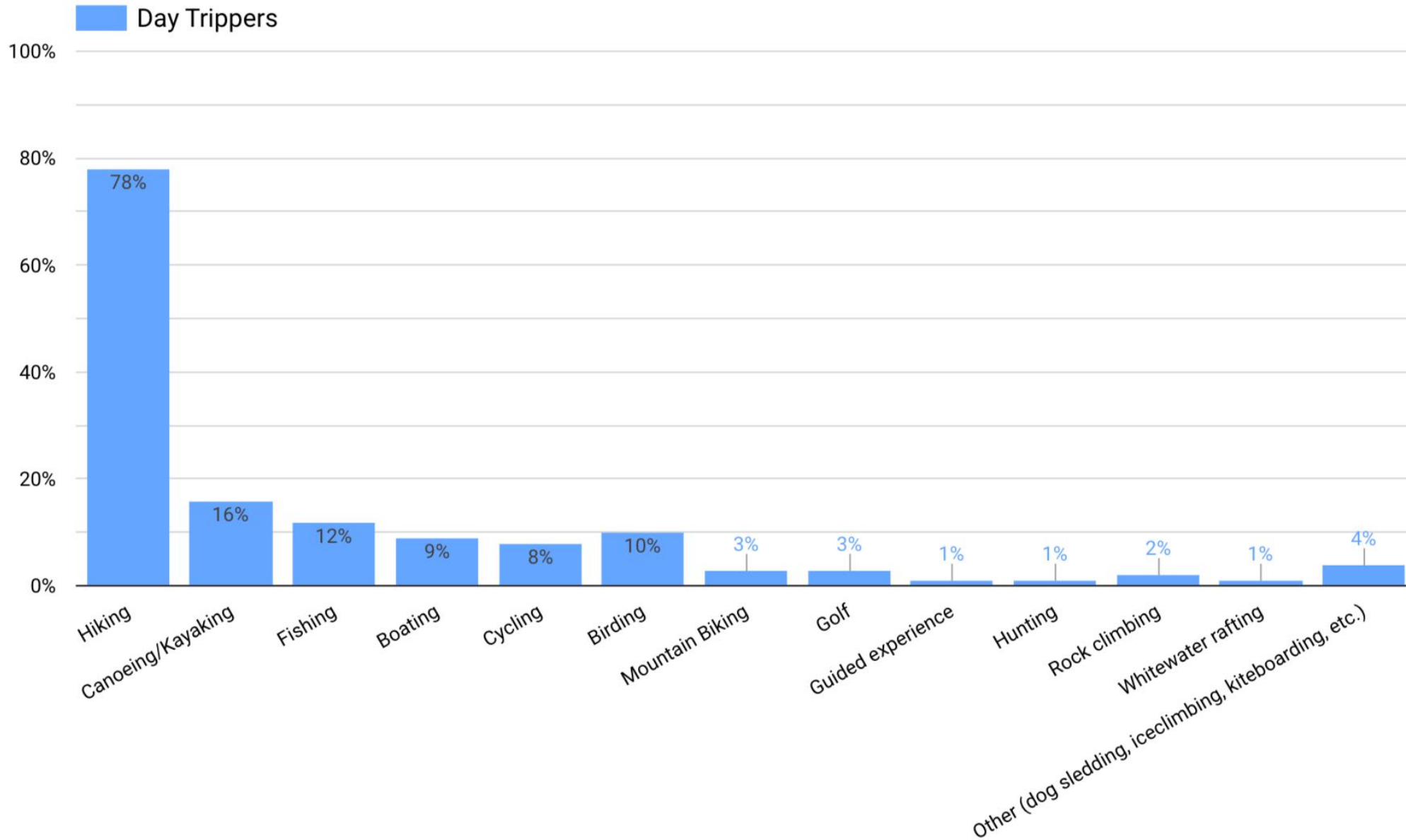
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Outdoor Spring / Summer activities

Day trippers

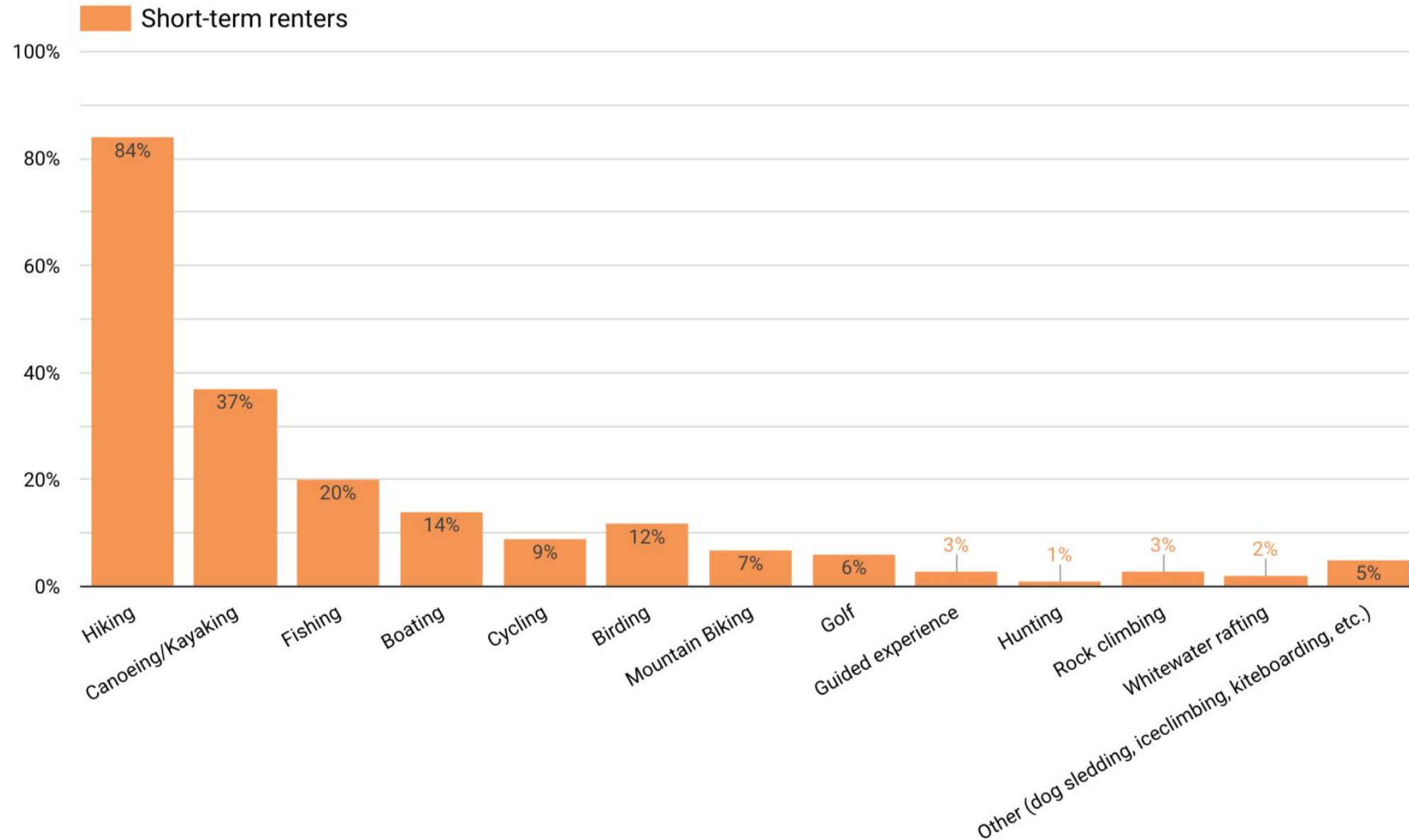
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Outdoor Spring / Summer activities

Short-term renters

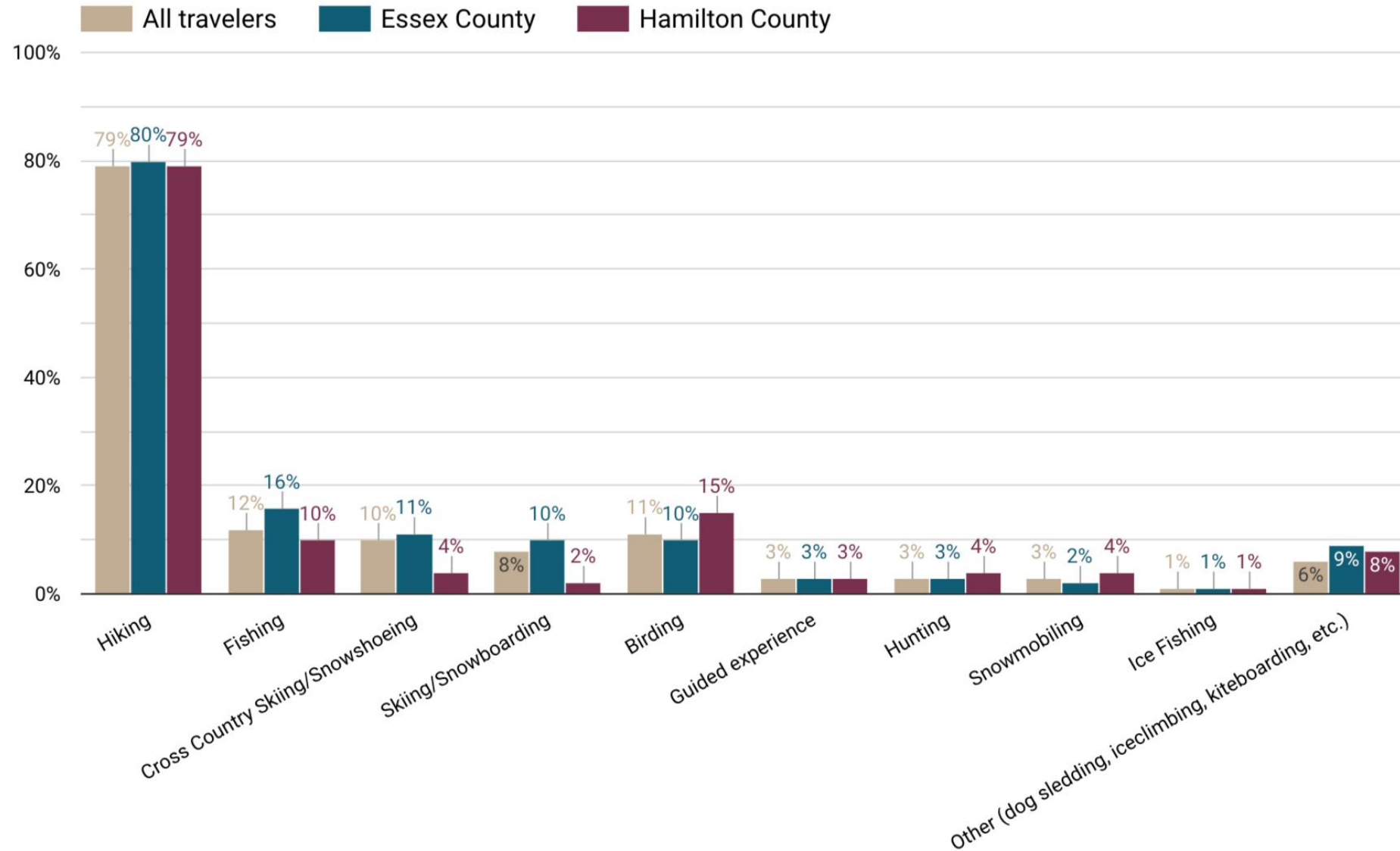
ROOST



Outdoor Fall / Winter activities

All travelers

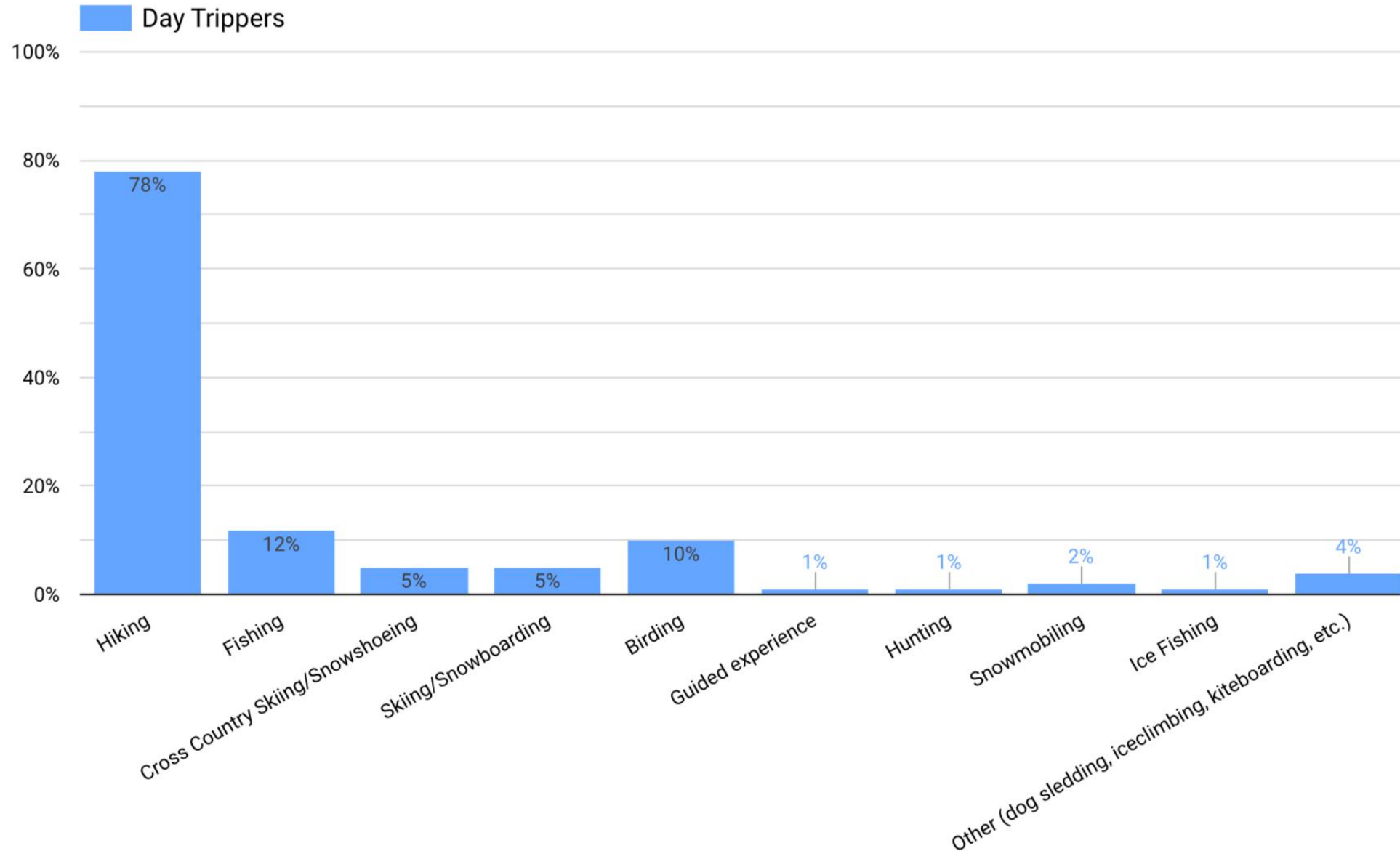
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Outdoor Fall / Winter activities

Day trippers

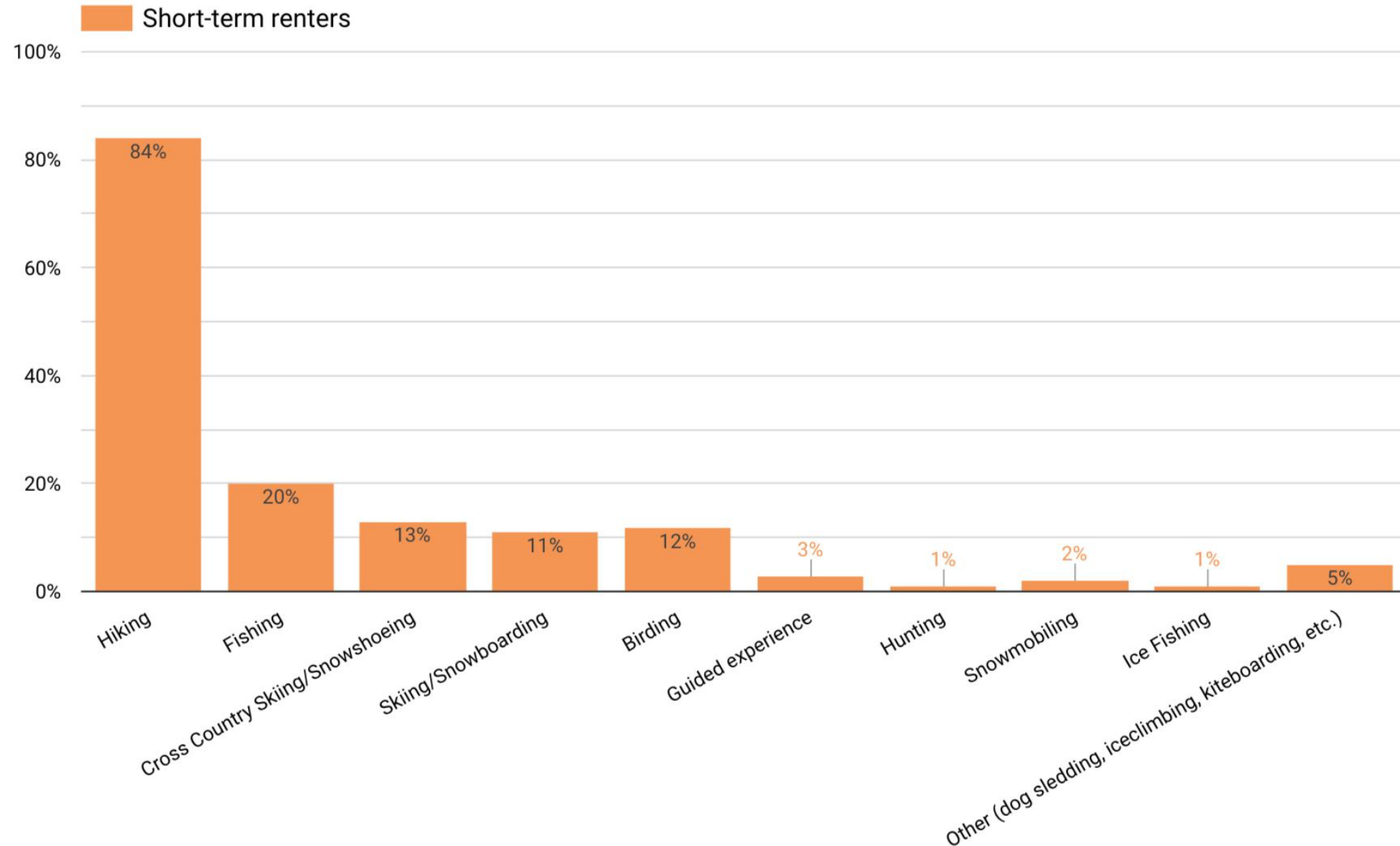
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Outdoor Fall / Winter activities

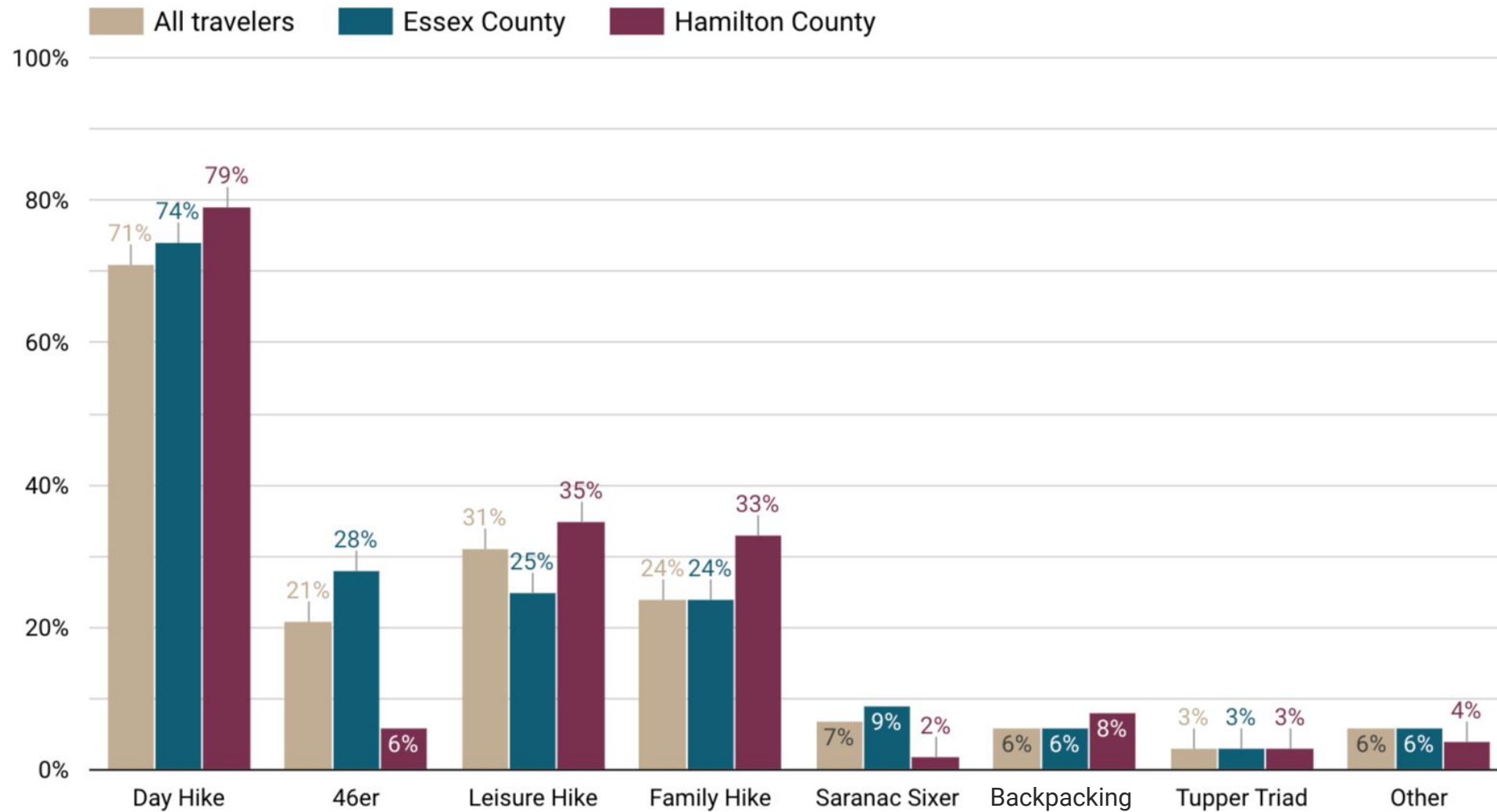
Short-term renters

ROOST



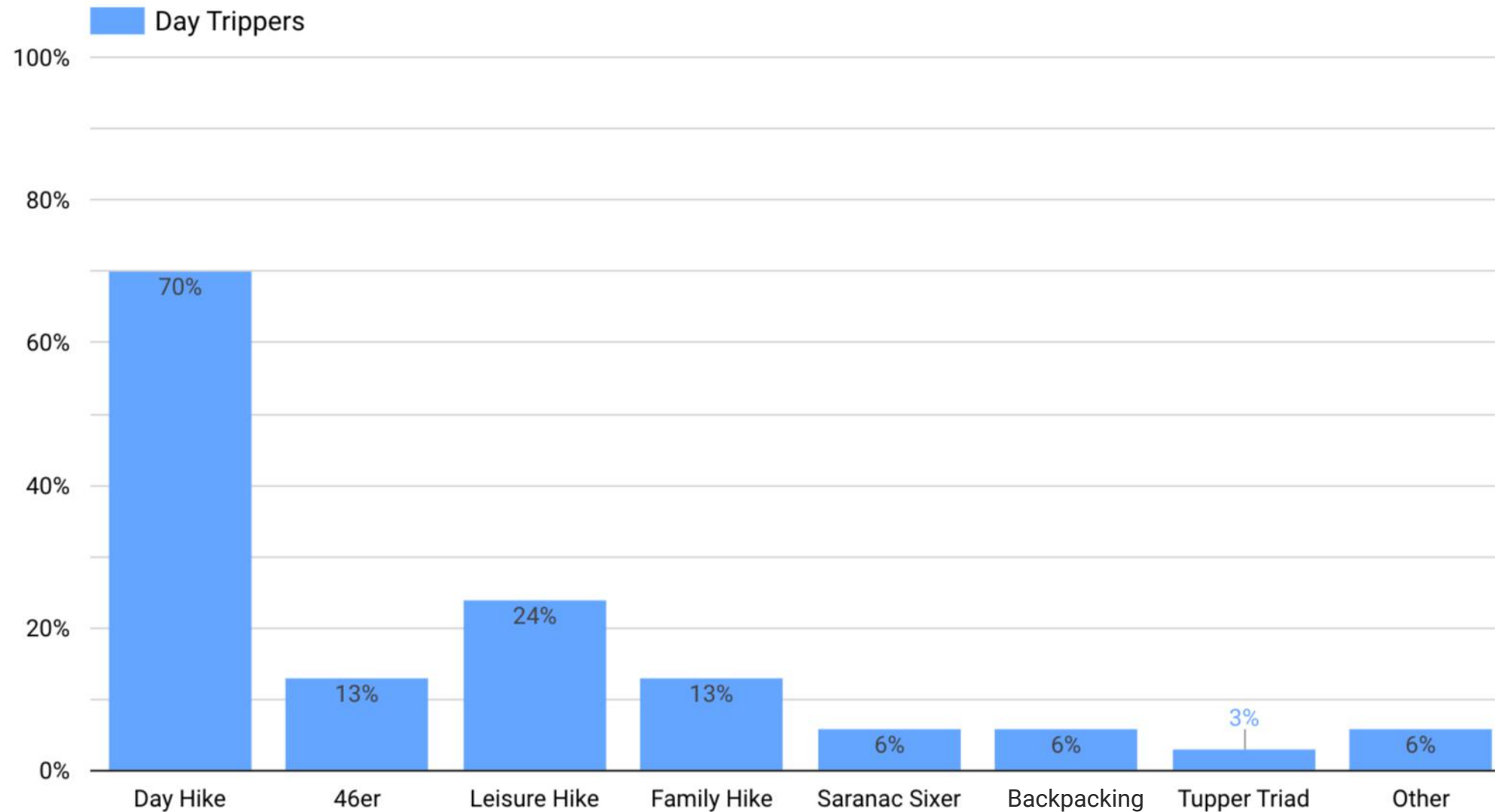
Hiking breakdown

All travelers



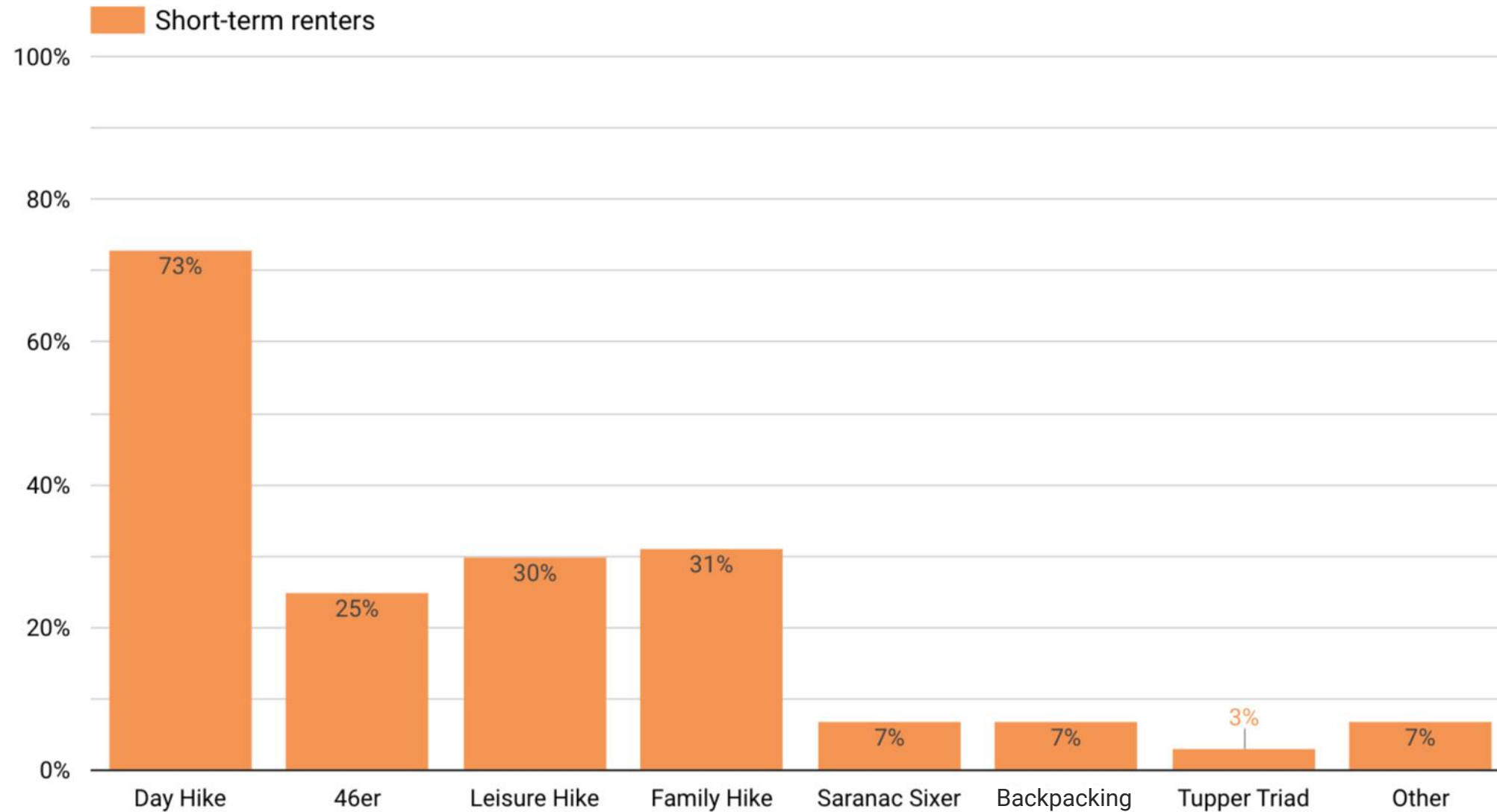
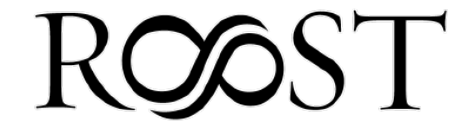
Hiking breakdown

Day trippers



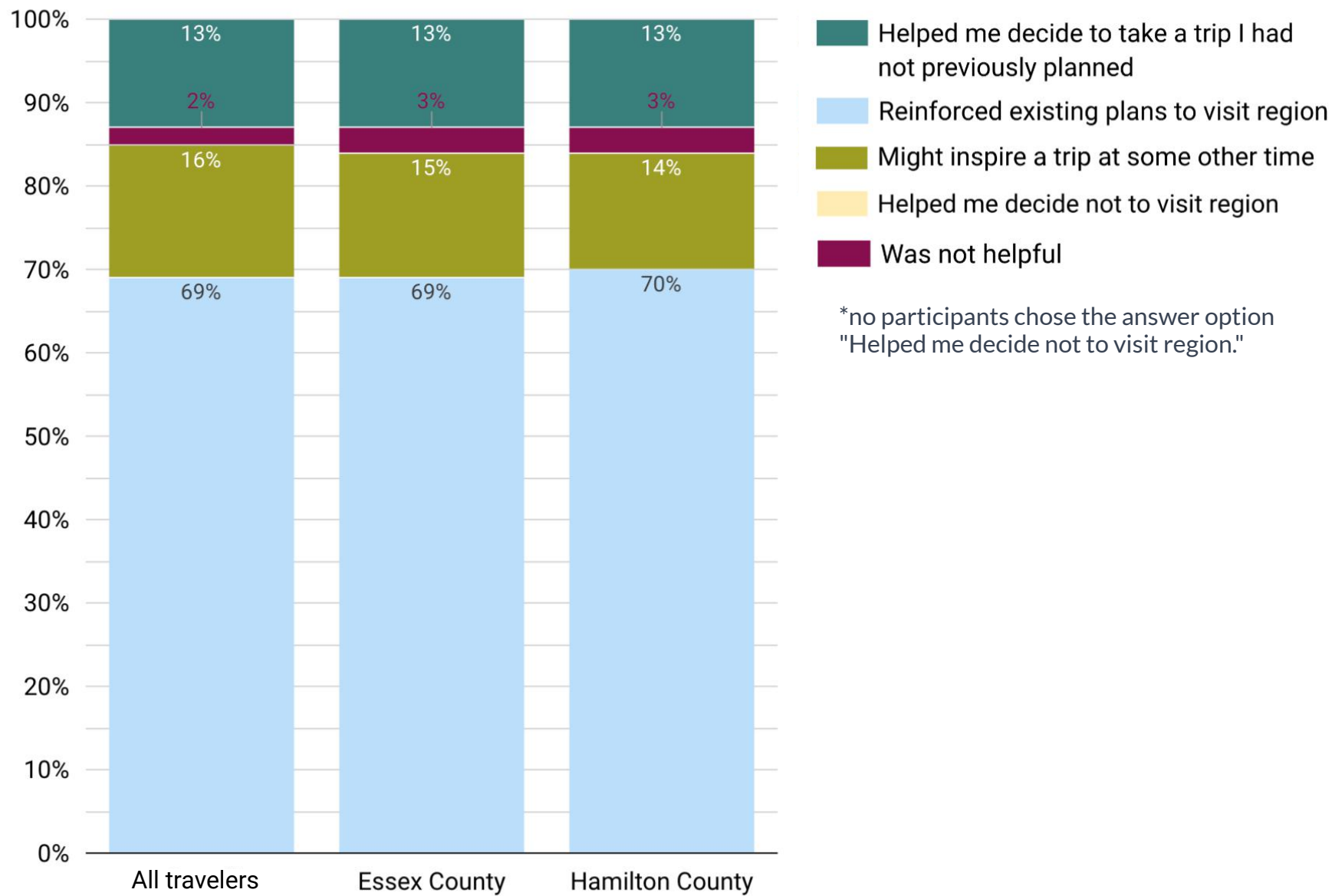
Hiking breakdown

Short-term renters



Conversion Rate from Viewing ROOST Marketing Materials

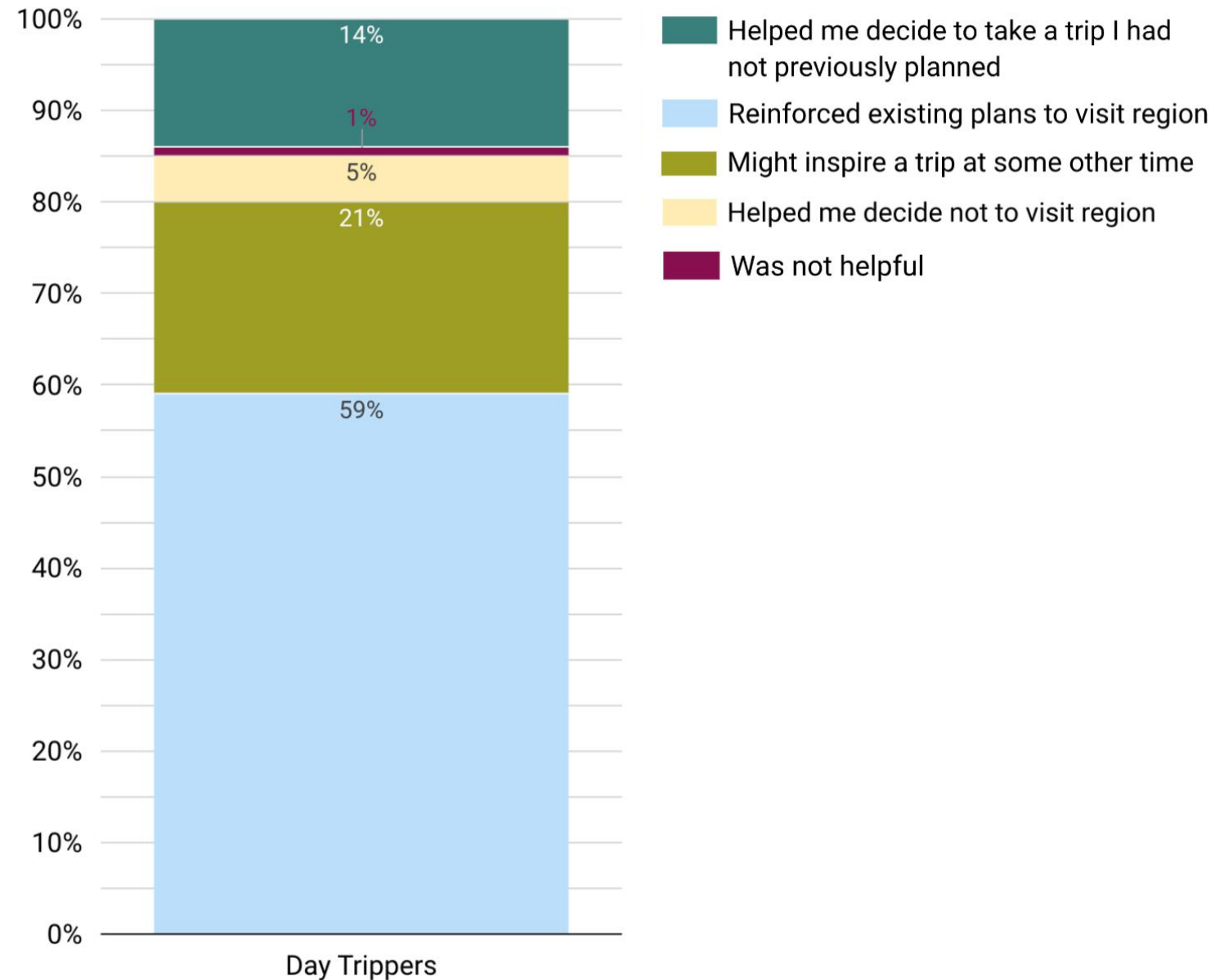
All travelers



*no participants chose the answer option "Helped me decide not to visit region."

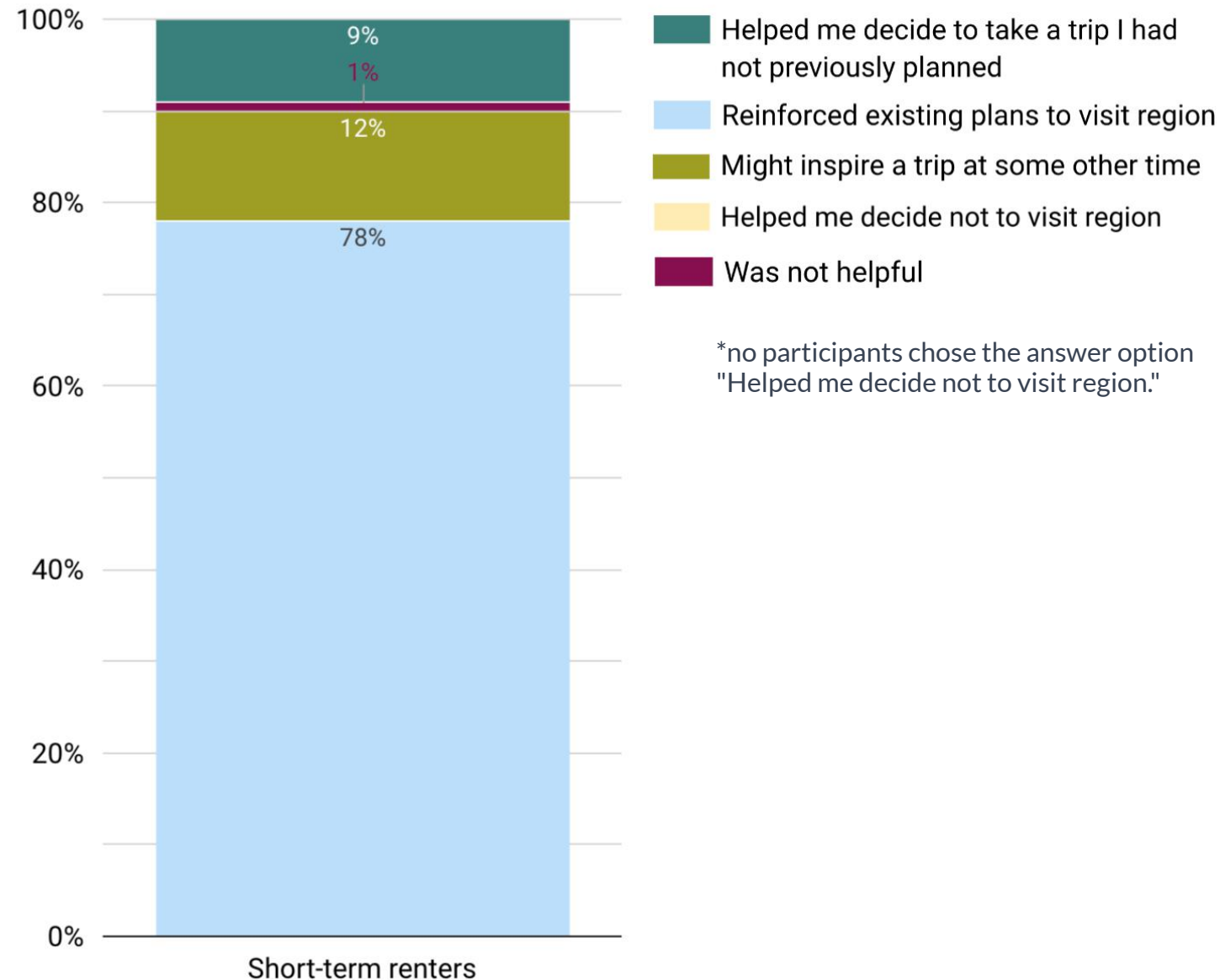
Conversion Rate from Viewing ROOST Marketing Materials

Day trippers



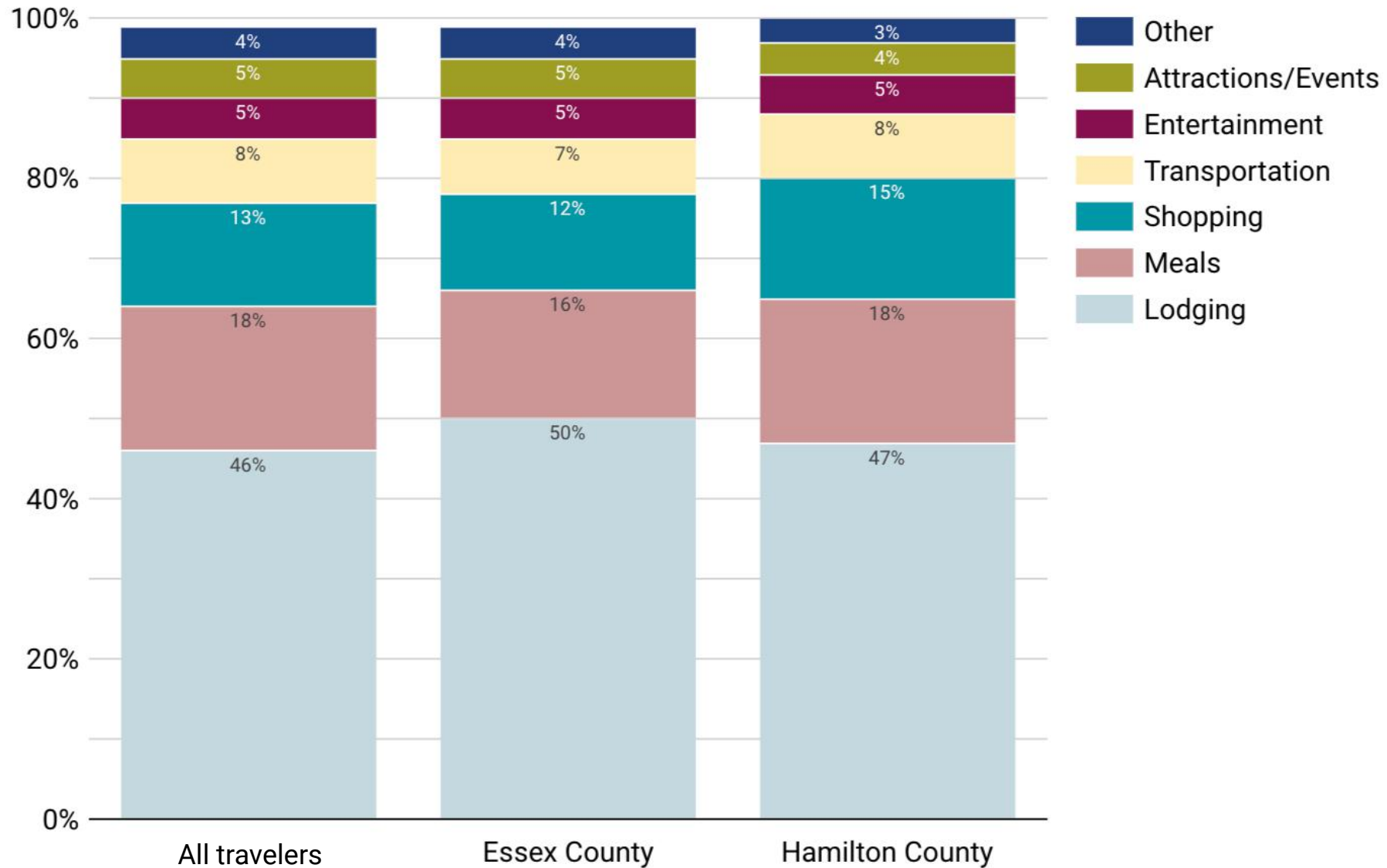
Conversion Rate from Viewing ROOST Marketing Materials

Short-term renters



Total expenditure allocation by category

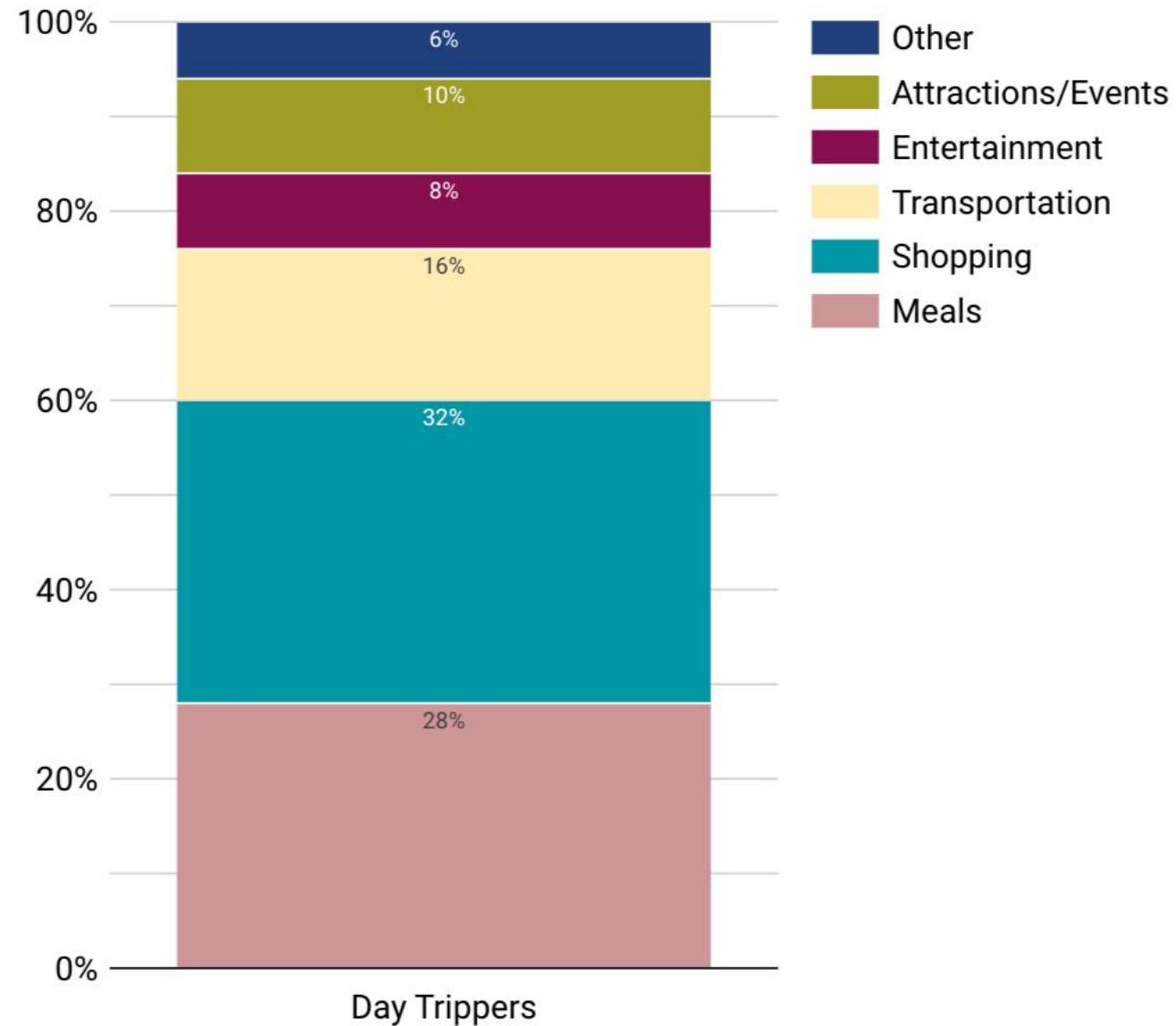
All travelers



Total expenditure allocation by category

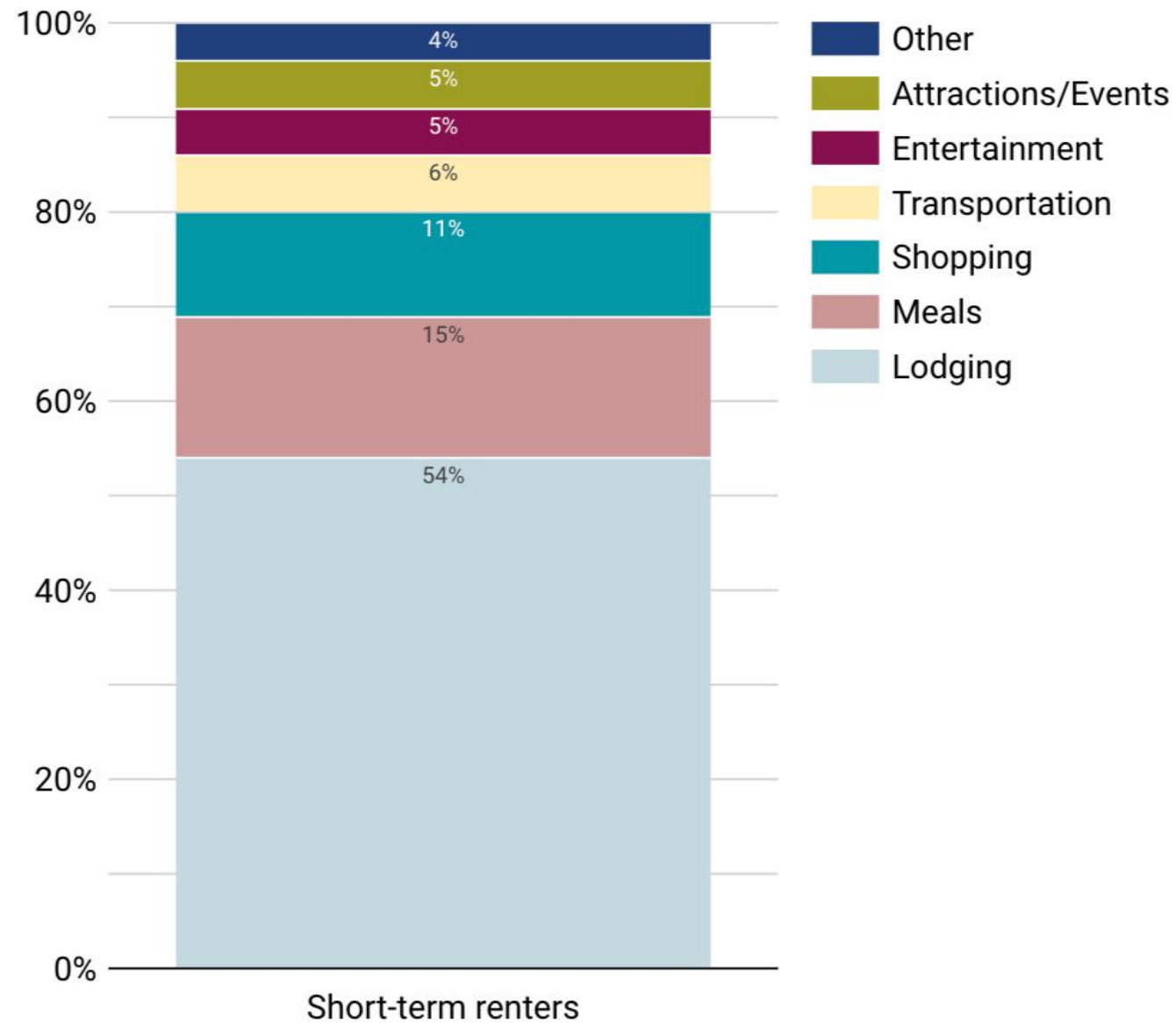
Day trippers

ROOST



Total expenditure allocation by category

Short-term renters



Mean party expenditures

All travelers



	All travelers	Essex County	Hamilton County
Lodging	\$787	\$950	\$667
Meals	\$298	\$311	\$253
Shopping	\$218	\$220	\$210
Entertainment	\$89	\$94	\$72
Attractions/Events	\$90	\$100	\$55
Transportation	\$140	\$140	\$120
Other	\$75	\$80	\$48
Average daily expenditure	\$459	\$512	\$375
Average total expenditure	\$1,697	\$1,895	\$1,425

Five year mean party expenditures

Essex County travelers



	Five year average	2022	2021	2020	2019	2018
Lodging	\$702	\$950	\$679	\$910	\$499	\$470
Meals	\$307	\$311	\$287	\$449	\$245	\$241
Shopping	\$215	\$220	\$215	\$274	\$200	\$164
Entertainment	\$81	\$94	\$83	\$67	\$84	\$76
Attractions/Events	\$78	\$100	\$83	\$57	\$84	\$68
Transportation	\$93	\$140	\$95	\$71	\$80	\$80
Other	\$50	\$80	\$40	\$10	\$68	\$52
Average daily expenditure	\$418	\$512	\$464	\$283	\$417	\$415
Average total expenditure	\$1,526	\$1,895	\$1,484	\$1,838	\$1,260	\$1,151

Mean party expenditures

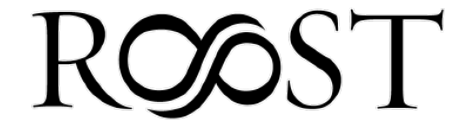
Day trippers

ROOST

	Day trippers
Lodging	
Meals	\$73
Shopping	\$84
Entertainment	\$20
Attractions/Events	\$27
Transportation	\$41
Other	\$17
Average daily expenditure	\$262
Average total expenditure	\$262

Mean party expenditures

Short-term renters



	Short-term renters
Lodging	\$1,634
Meals	\$462
Shopping	\$320
Entertainment	\$145
Attractions/Events	\$148
Transportation	\$192
Other	\$118
Average daily expenditure	\$604
Average total expenditure	\$3,019

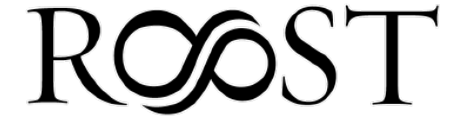
Essex County Visitor Profile

ROOT



Visitor profile

All Essex County travelers



- Average visitor party age of respondents was 58 years old, consistent with age from prior year survey and slightly higher than the five year average (56).
- 94% of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Asian and Hispanic. Less than 1% of respondents reported African American/Black, and nearly 3% reported mixed race.
- The average reported total traveler party size climbed slightly from the prior year to 3.3 persons, including 2.6 adults and 0.7 child.
- About two-thirds of visitors (67%) reported that they were New York state residents, dropping from nearly 80% in 2020 and 74% in 2021.
- Northeastern state visitors outside of New York state rose for the second consecutive year to one out of five (20%) of respondents. Out of state visitors coming from areas beyond the north comprised 8% of respondents, with the southern U.S being 5% of that figure.
- Canadian travel began to rebound in 2022, with three percent of visitors reporting from Quebec and two percent from Ontario.

Visitor profile

All Essex County travelers

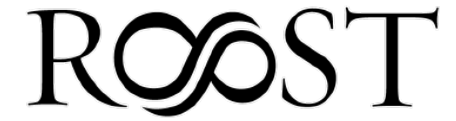


- Average duration of stay reported by 2022 travelers climbed to 3.7 nights (3.3 nights reported in 2021) and slightly below the five-year average (3.9).
- For the second year in a row, reported fall visitation comprised the highest proportion of visitors (September/October- 29%). The shift in stronger fall visitation is a point which researchers are continuing to note and focus on for future investigation.
- Frequency of reported fall visitation was followed by peak summer season (July/August- 21%). Reported January/February (11%), March/April (10%), May/June (18%), and November/December (11%) remained consistent from the year prior.
- Hotels/motels remained the most-reported lodging choice among 2022 traveler respondents by a high margin (41%). However this gap between the next most common lodging choices has decreased over the years.
- Short-term rentals were reported as the second most common lodging choice used by 19% of respondents. Respondents reported staying with family and friends fell to 14% (from 15% in year prior). Reported second home use (11%) and bed and breakfast (3%) stays remained relatively consistent from prior recent years. Camping and RV stays climbed slightly to 12% of reported stays (from 11% in year prior).

- The most reported draw in visiting the region continued to be outdoor activities, with 73% of respondents selecting this attraction to visit the area.
- “Relaxing, dining and shopping” remained the second-most commonly expressed reason to visit the area, selected by 60% of respondents. Sightseeing (48%) and visiting friends (28%) rounded out the top four areas of expressed interest. Each of these most commonly selected areas of interest rose slightly from the prior year.
- Twenty-three (23%) of respondents reported visiting Olympic sites as an attraction, a sizable jump from the 17% reporting such interest in 2021.
- Eighty percent (80%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of primary interest. The strength of hiking as a draw to visit the region has remained very strong during the past five years. Reported interest in canoeing or kayaking was the next most commonly reported outdoor interest (29%), followed by fishing (16%). These remained consistent with the year prior.

Visitor profile

All Essex County travelers



- Average daily traveler party spending in 2022 was estimated at \$512 per day. This represents a 10% increase in daily spending from prior year reported spending.
- The total average estimated trip expenditure was \$1,895, a 27% increase in total reported spending by 2022 visitors. This returns estimated spending levels to the record high seen in 2020 during the height of the pandemic (unusually long trips due to displaced work/vacation schedules).
- Reported spending on lodging showed a record-high (from the nearly 20 years of this data collection) of \$950 per average stay, climbing 39% from the prior year. This comprised the largest proportion of the overall reported spending increases.
- All other spending categories showed at least modest increases from the prior year, with transportation demonstrating a steep climb of 40% in estimated cost.
- ROOST received 285,844 contacts through its marketing efforts for Essex County in 2022. Contacts have steadily increased during the last two years in recovery from the pandemic.

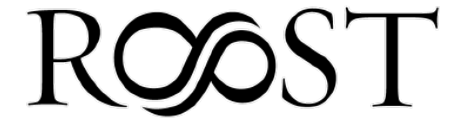
An aerial photograph of a large, calm lake surrounded by dense green forests. In the foreground, a campsite is visible with several white RVs and cars parked among tall pine trees. The lake's surface is dotted with lily pads. In the background, rolling hills and mountains are visible under a sky with scattered clouds. A semi-transparent white banner is overlaid across the upper portion of the image, containing the title text.

Hamilton County Visitor Profile

ROOST

Visitor profile

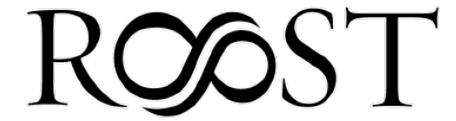
All Hamilton County travelers



- Average traveler party age of respondents was 59 years old, consistent with recent years.
- Ninety four percent (94.7%) of visitor respondents were of white ethnicity; with 1% Native American and less than 1% each African American/Black and Asian. Two percent of visitors reported mixed race.
- The average reported total traveler party size dropped among reported 2022 visitors 3.6 persons, including to 2.8 adults and 0.8 child, close to reported party size from prior year (3.8).
- Visitation by respondents from within New York state stayed consistent to prior year at 81% of respondents.
- Northeastern state visitors outside of New York state stayed consistent from the prior year at 12% respondents. Reported visitation from other U.S. regions than the Northeast was 6%, with 5% of these from the southern U.S. This is a sizable jump from the 3% reporting travel from outside of the Northeastern U.S (and New York) in 2021.
- Less than 1% of respondents were from Canada.

Visitor profile

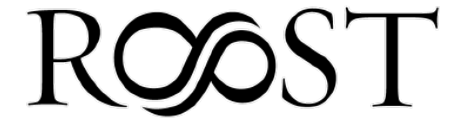
All Hamilton County travelers



- Average stay length reported by 2022 travelers climbed just slightly from 3.7 in last year's data to 3.8 nights.
- Fall season visitation (September/October) climbed again from prior year to 34% of all 2021 reported visits, now notably higher than peak summer (July/August) visitation at 28%.
- The rate of early summer visitation (May/June) was consistent with recent years at 20% and reported early winter visitation (November/December) rose for the second year to 8%. January/February visitation dropped from year prior to 6%. March/April visitation fell slightly from the prior year to nearly 5%.
- Camping/RV is the most commonly reported lodging choice among 2022 traveler respondents at 26%, followed by hotels/motels at 22%.
- Second home use and short-term rentals are equally reported at 16%. Staying with family and friends climbed somewhat to 17% of reported visits in 2022.

Visitor profile

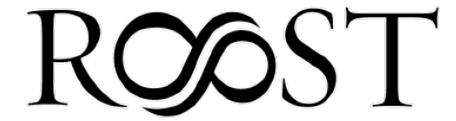
All Hamilton County travelers



- The most popular reported attraction to visit the region continued to be outdoor activities, with 69% of respondents selecting this draw to visit.
- “Relaxing, dining and shopping” remained the second most common expressed reason to visit the area by 51% of respondents. This area of interest showed a 5% drop from the level reported in the prior year. Sightseeing (45%) and visiting friends (25%) rounded out the top four areas of interest.
- Thirteen percent (13%) reported interest in heritage sites and nine percent (9%) in events, both marked increases in level of interest from prior year. Seven percent (7%) showed an interest in arts and entertainment.
- Seventy-nine percent (79%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was a primary activity of interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (55%), followed by boating (27%). Both canoeing/kayaking and boating levels of interest climbed five percentage points over prior year data.

Visitor profile

All Hamilton County travelers



- The average daily traveler party spending in 2022 increased to \$375 daily from \$314 in 2021. The total estimated average trip expenditure for 2022 visitors is \$1,425. Overall reported expenditures grew by a notable 22% in last year by comparison.
- Reported spending on lodging accounted for much of this daily expenditure growth at \$667 per stay and a record high for this data point.
- All other expenditure categories showed increases in comparison to the prior year, including meals (\$253), shopping (\$210), entertainment (\$72) and attractions (\$55) also showed growth from the 5-year daily spending trend. The stronger than 5-year average expenditures suggest a positive trend.
- Conversion measurement, the percent 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 83%. This is slightly higher than the last several years of conversion rates, showing a trend of steady increases in this measurement of effectiveness in marketing to the region.

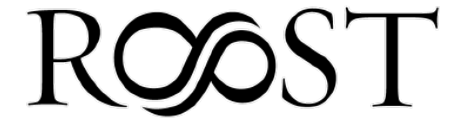
Day Tripper Visitor Profile

ROOST



Visitor profile

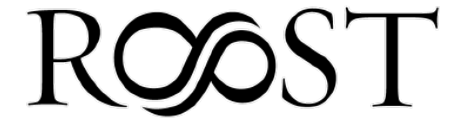
Day trippers



- Average day trip visitor party size is 2.8 persons, including 2.3 adults and 0.5 child. This is consistent with the prior year visitor party size.
- Overall visit expenditures continue to be much lower among day trip visitors. The total average reported party expenditure for day travel is \$262 compared to \$459 daily expenditures by all visitors. Daily reported spending by day trip visitors increased only slightly (2%), whereas daily spending levels by visitors with longer durations increased markedly (9%) from 2021 to 2022 surveying.
- Shopping comprises the largest portion of this cohort at \$84. Meals are the next largest category of expenditures at \$73, followed by transportation (\$41) and attractions or events (\$17).
- Nearly one-third of day visits (32%) are reported during peak fall foliage season (September/October) with other visitation levels spread out fairly evenly throughout the rest of year. May/June time period demonstrates a higher proportion of day trip visitation.

Visitor profile

Day trippers



- Sightseeing and outdoor activity are the equally strongest reported draws to visit the region, expressed by 56% of 2022 day visit respondents. Relaxing, shopping and dining is the next most common reason expressed to visit, reported by 51%. The next draw most commonly reported was to visit family or friends (25%).
- Among day visitors who responded that they were interested in outdoor activities, interest in hiking was by far the most popular interest, selected by 78% of respondents. Expressed interest in canoeing/kayaking was 16%, fishing 12%, birding 10% and boating 10%.
- Day trip visitors continue to report a slightly higher average age compared to all visitor groups (at 59 years old).

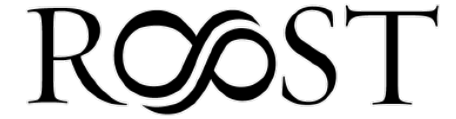
Short-Term Renter Visitor Profile

ROOST



Visitor profile

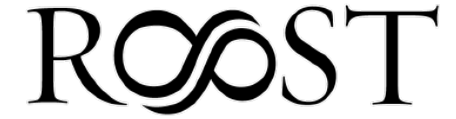
Short-term renters



- Average short-term renter traveler party size is larger with 4.7 persons (3.6 adults and 1.1 child) versus 3.4 for all visitors to the region. This is a smaller party size than noted among short-term rental visitors in the last five years of data collection.
- Total expenditures reported among short-term renters were an average of \$3,019. This is nearly double the average regional visitor reported expenditures of \$1,697 per trip. The total expenditures among this group also increased over 10% from 2021 reported levels.
- Lodging costs accounted for more than half of this reported expenditure (\$1,634). Meals (\$462) and shopping (\$320), entertainment (\$145), attractions/events (\$148) also showed marked increases. All average expenditure categories reported by short-term renters are substantially higher than averages as reported by all regional visitor averages.
- The reported average length of stay for short term renters is 5 nights, consistent with most recent years, excluding 2020 when pandemic travel resulted in much longer stays. Short-term renter stays remain longer, on average, than those of all visitors (3.7 nights in 2022).

Visitor profile

Short-term renters



- Time of year visitation varies somewhat between these visitors who reported staying in short-term rentals in comparison with all visitors. Peak summer visits (July/August) were the most common time for reported visitation at 26%, followed by September/October (25%). The full visitor group demonstrated stronger fall (September/October) visitation (30%). November/December appears to be more common time for visitation among short-term renters (16% of these respondents, compared to 11% of all visitors).
- Outdoor activities (74%), relaxing/dining (67%) and sightseeing (53%) were the highest levels of reported interest to visit the area among short-term renters. This is consistent with the three most common activities reported by all visitors. However, all three percentages are higher within the short-term renter group.
- Short-term renters express a lower rate of interest in “visiting family and friends” in 2022 than did all visitors (22% vs 25%). Olympic site visitation is also a higher expressed interest by short-term renters than by all visitors in this year (25% vs. 15%).
- The mean age of short-term renters is slightly younger than the full regional group at 55 years (versus 58).

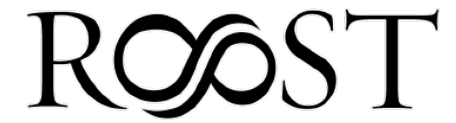
Regional Visitor Impacts

ROOST



Regional visitor impacts

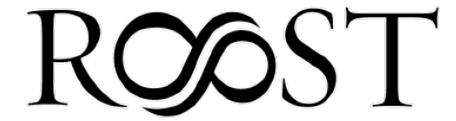
All travelers



- Average traveler party age of respondents was 58 years old, slightly older than the five-year average.
- The average reported total traveler party size was 2.7 adults and 0.7 child, for a total of 3.47 persons. This represents two years of smaller average party sizes from these data.
- Ninety-four percent (94%) of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American, Asian and Hispanic. Less than 1% of respondent reported African American/Black and 2% reported mixed race.
- Reported visitation by respondents from New York state fell to 69% from 2022, marking two years of decline since a notable high of 80% during the height of the pandemic in 2020.
- Visitors traveling from northern New York and central/western New York comprised the largest group of these respondents at 33% each.
- Northeastern state visitors outside of New York state were consistent from the year prior at 18% of respondents. Visitors reporting from states outside the Northeast rose slightly to 8%. Five percent of these visitors traveled from the southern U.S.

Regional visitor impacts

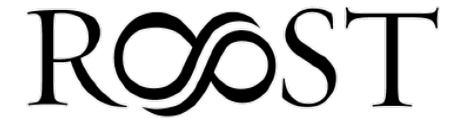
All travelers



- Canadian visitation rebounded somewhat with a reported 2% of visitors from Quebec and 2% from Ontario.
- Stay length reported by 2022 travelers increased slightly from that reported in 2021 to 3.7 nights. This is closer to the five-year average duration of stay (4 nights).
- For the second consecutive year, reported fall visitation in September/October (29%) exceeded reported summer visitation in July/August (23%). May/June (16%), January/February (10%) and March/April (8%) stayed fairly consistent from prior years. Reported November/December visitation climbed from 8% to 11% among 2022 visitors (compared to year prior). The shift in stronger fall visitation is a point which researchers are continuing to note and focus on for future investigation.
- Hotels/motels remained the most frequently reported lodging choice among 2022 traveler respondents (38%), but still decreased from five-year averages as other market share has grown.
- Reported stays in short-term rentals increased to 18% (from 16% in 2021). Other lodging types stayed consistent with recent years with 14% reporting staying with family/friends, 15% in camping/RVs. Visitors reported staying in second homes slightly less from 2021, with 12% indicating this lodging choice.

Regional visitor impacts

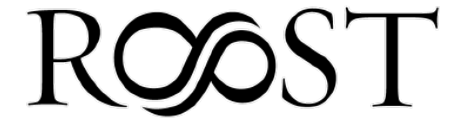
All travelers



- The highest ranking attraction to visit the region continued to be outdoor activities, with 62% of respondents selecting this draw to visit.
- “Relaxing, dining and shopping” remained another frequently expressed reason to visit the area by 58% of respondents. Sightseeing (47%) and visiting friends (27%) rounded out the top four areas of interest. Thirteen percent (13%) of respondents reported visiting Olympic sites and events as an attraction. Reported interest in heritage attractions rose slightly from prior year to 12%.
- Seventy-nine percent (79%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (35%), followed by boating (16%).
- Fishing was expressed as an outdoor activity of interest by 13% of respondents. Eleven percent (11%) of respondents indicated interest in birding and ten percent (10%) indicated interest in cross-country skiing/snowshoeing.
- A question regarding hiking preferences continues to indicate a strong preference in casual hiking, with 71% of respondents indicating interest in day hikes, 31% leisure and hard surface hiking and 24% family hikes. Forty-sixer level hike interest raised in 2022, to 21% of respondents.

Regional visitor impacts

All travelers



- Increased expenditure levels were reported by 2022 visitors in comparison to the 2021 year. The average daily traveler party spending in 2022 was estimated at \$459. This is a new high level among recent years of data collection.
- The total estimated reported trip expenditure was \$1,697. Visitor spending has increased for the past five years, including an even larger spike during 2020 due to longer stays.
- Reported spending on lodging (\$787) represents a remarkable 23% increase in this spending from the year prior. Reported meal spending also climbed 7% from the year prior to \$298. These data are supported by the increases in revenue substantiated by ancillary research.
- All other expenditures categories demonstrated increases as well, resulting in strong expenditure profiles. This includes shopping (\$218), entertainment (\$89), transportation (\$140) and attraction/events (\$90).
- Over 215,000 individuals contacted ROOST via its various outlets for travel information about the region in 2022. This is a near record level and a 2% increase from the prior year.

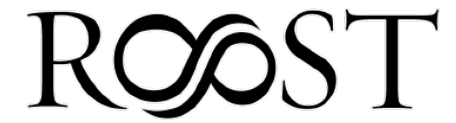
Regional ROI Study

ROOST



Return on investment (ROI)

All travelers



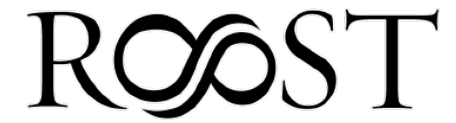
The estimated total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials is calculated by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures, and length of stay:

$$\begin{array}{ll} 215,944 & \text{(direct leads)} \\ \times 82\% & \text{(gross conversion factor)} \\ \times \$459 & \text{(mean traveler party expenditure per day)} \\ \times 3.7 & \text{(mean length of stay in nights)} \end{array}$$

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2022 is **\$300,724,910.**

Return on investment (ROI)

All travelers



The estimated return on investment is calculated by dividing the total revenue generated by travelers by the total marketing dollars spent by ROOST:

$$\begin{array}{l} \$300,724,910 \text{ (total estimated traveler revenue)} \\ \div \$3,188,710 \text{ (total ROOST marketing expenditures)} \end{array}$$

This produces a conservatively-estimated ROI of 94:1 in leisure traveler-related revenue for every marketing dollar expended.