



Leisure Travel Study

Essex and Hamilton Counties, Saranac Lake, and Tupper Lake

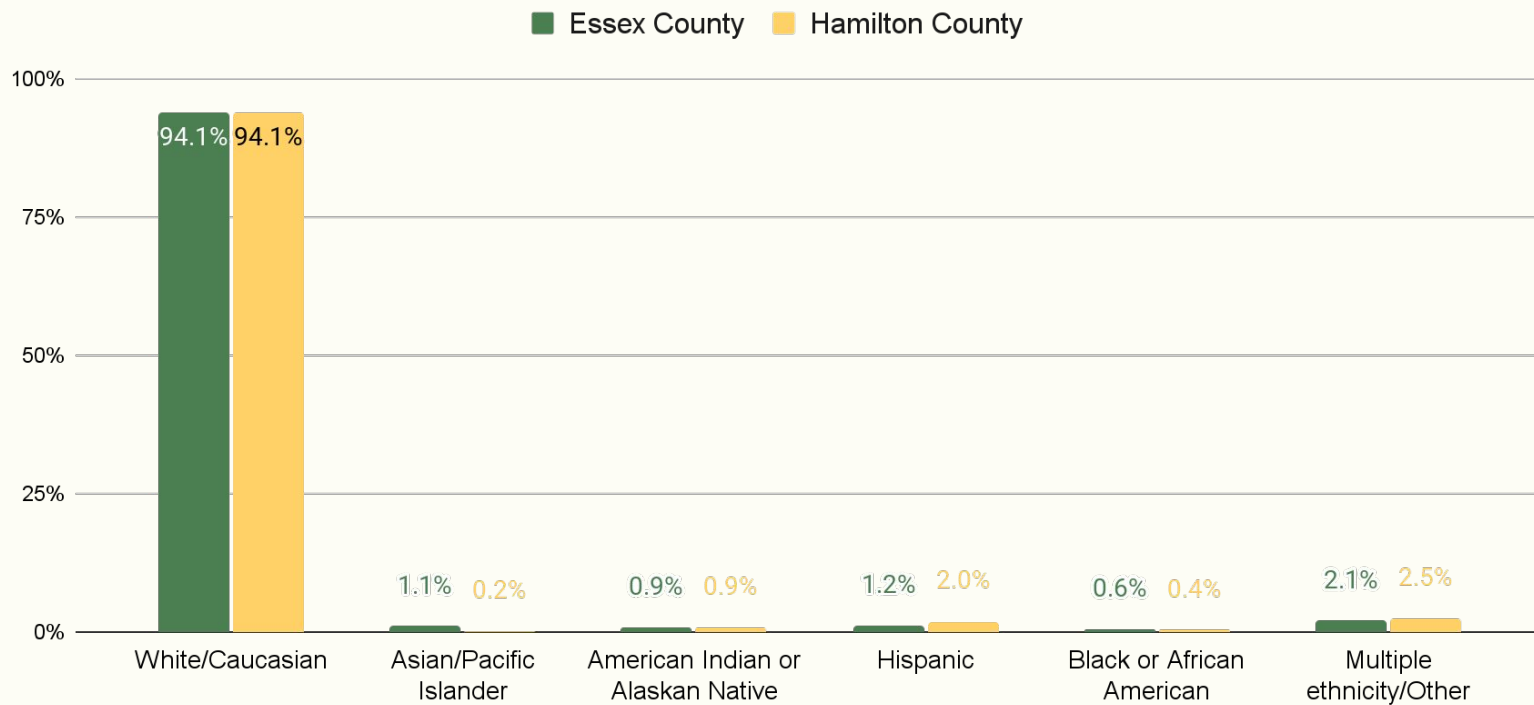
2024 COUNTY VISITOR PROFILES AND REGIONAL
RETURN ON MARKETING INVESTMENT ANALYSIS

ROOST

Project background and methodology

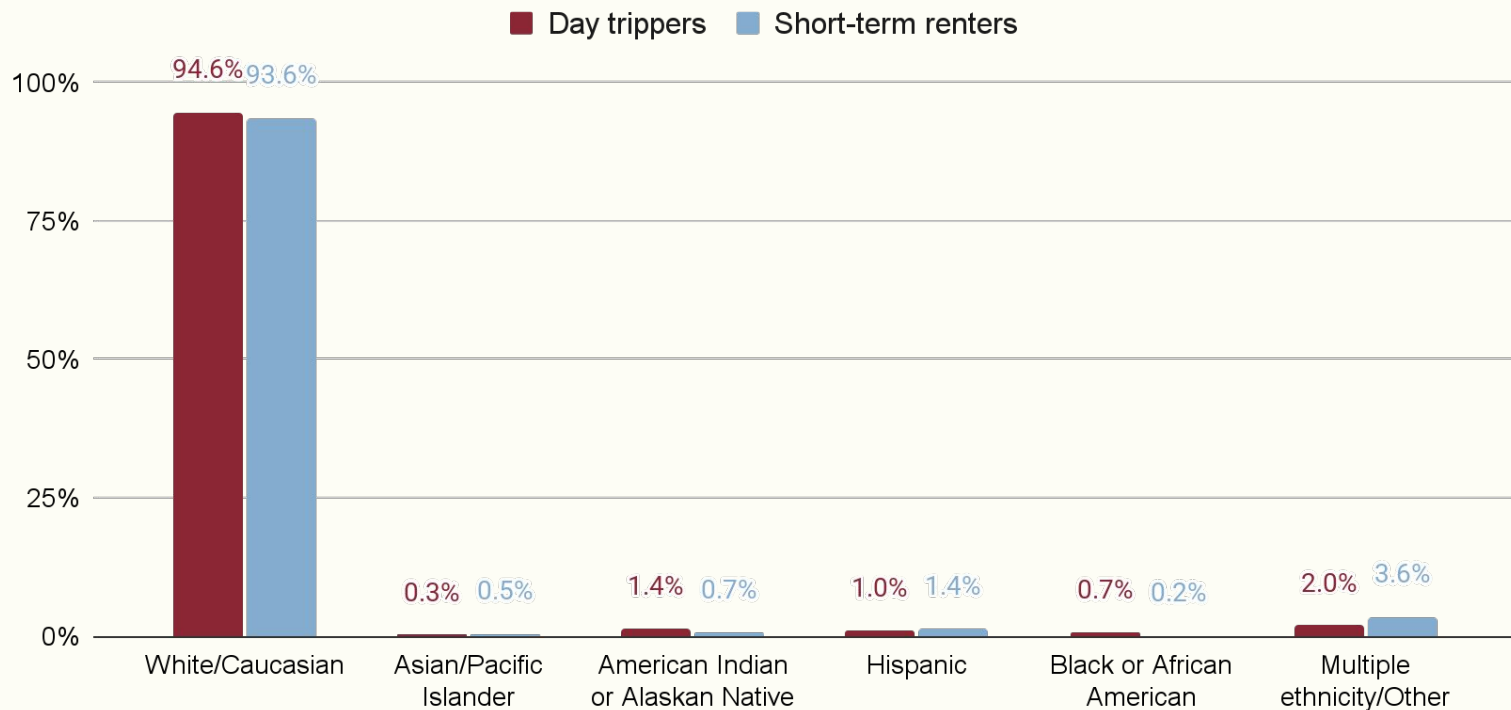
- ROOST commissioned a study with PlaceMaking, a regional community and economic development research firm, to determine visitor information at the county levels and to gauge key regional marketing program statistics.
- ROOST sent a jointly created survey to a sample of its 2024 leisure travelers to the region. This study marks 21 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.
- 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 215,140 traceable leads who were interested in visiting the region in 2024. 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

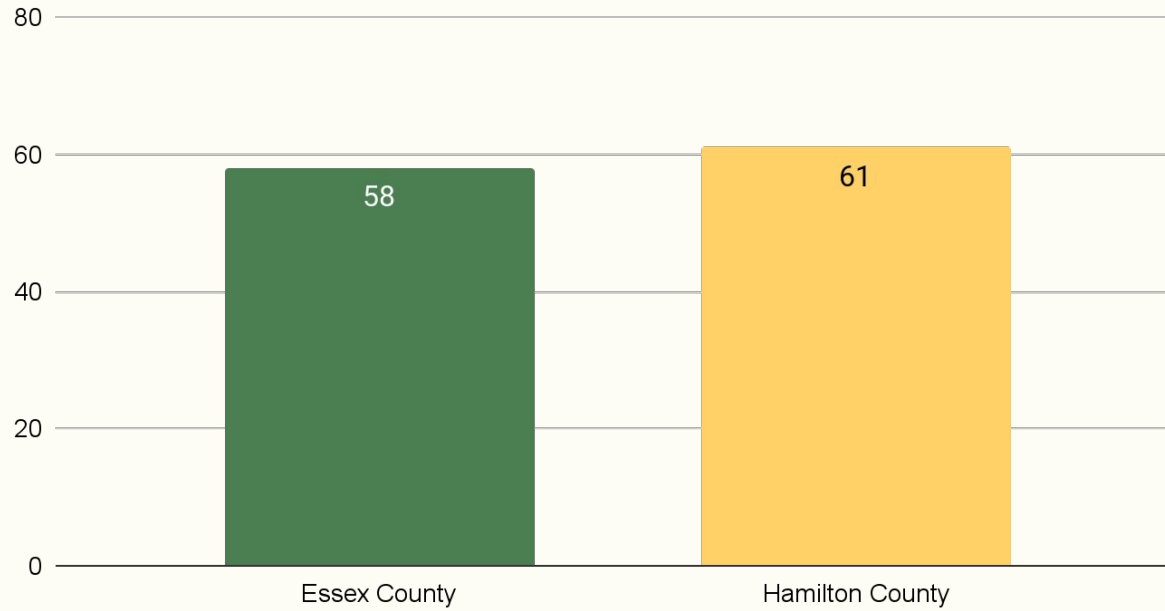


Ethnicity

Day trippers / Short-term renters

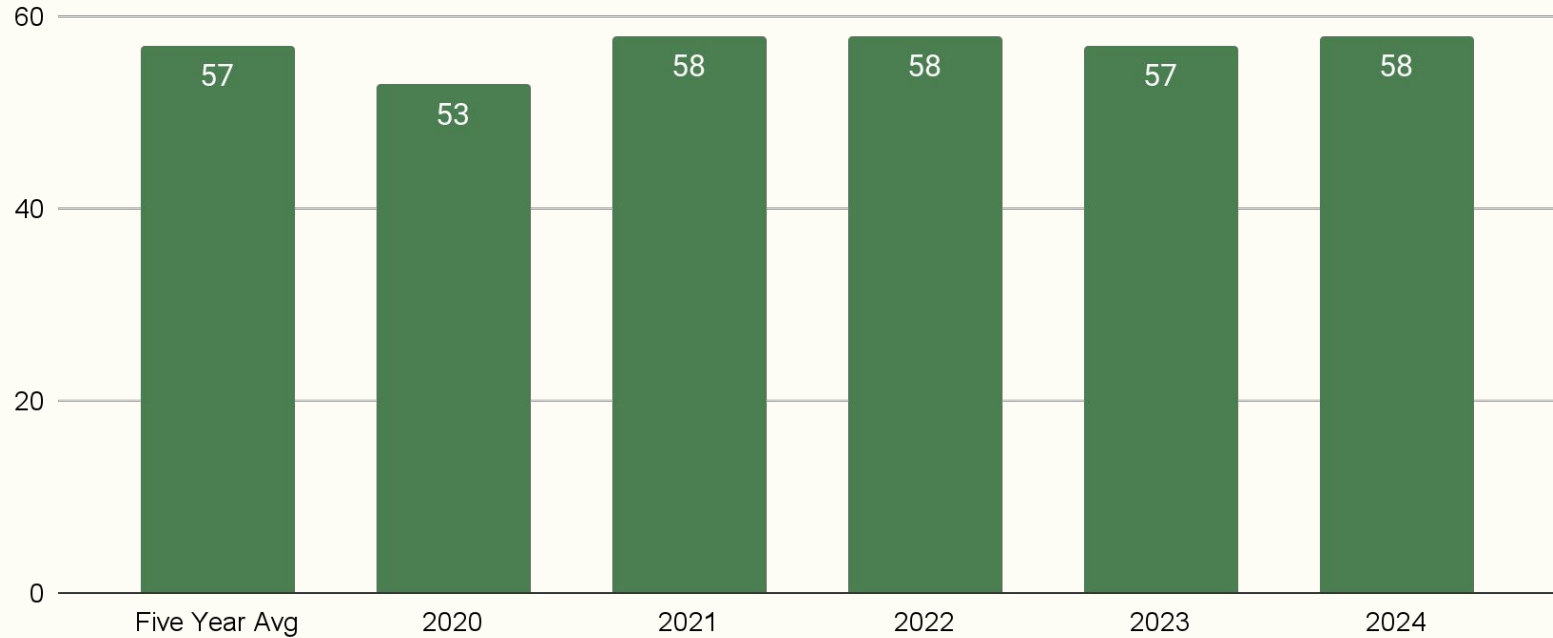


Average age



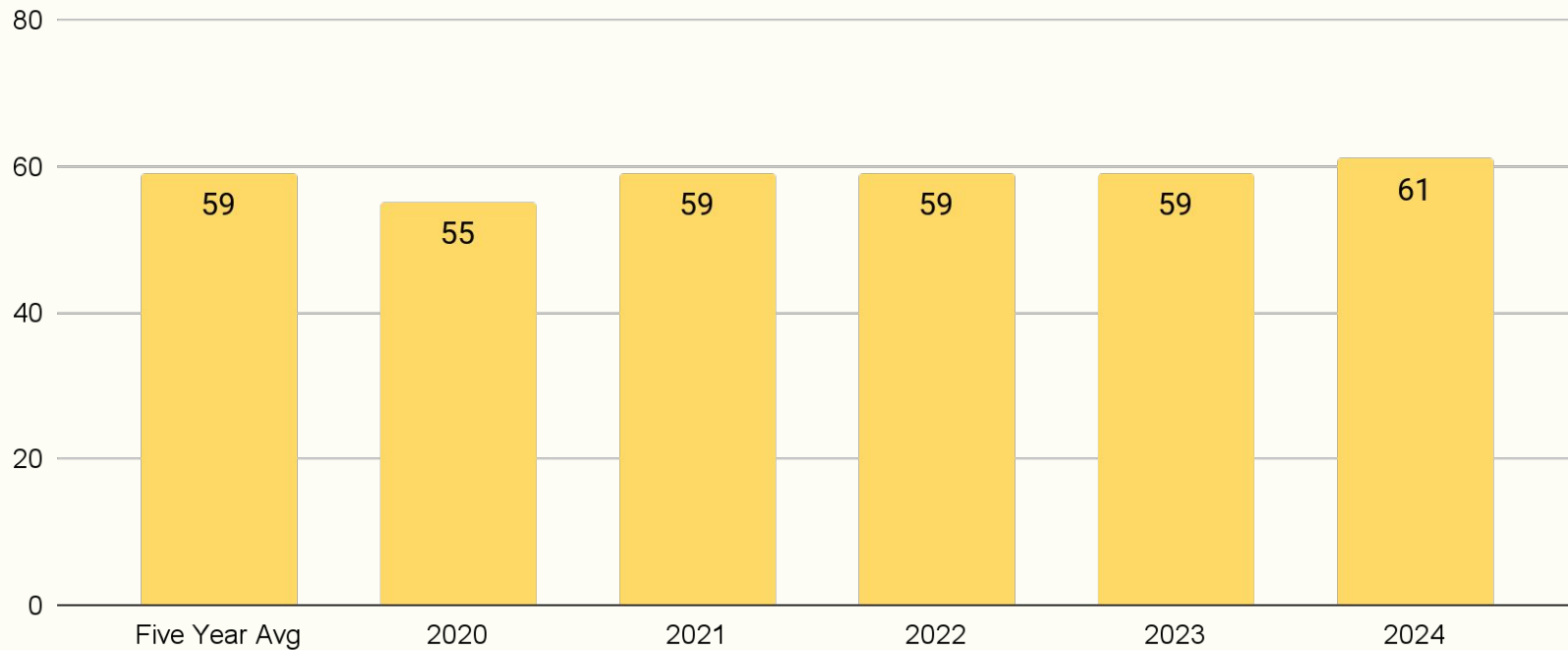
Five year average age

Essex County



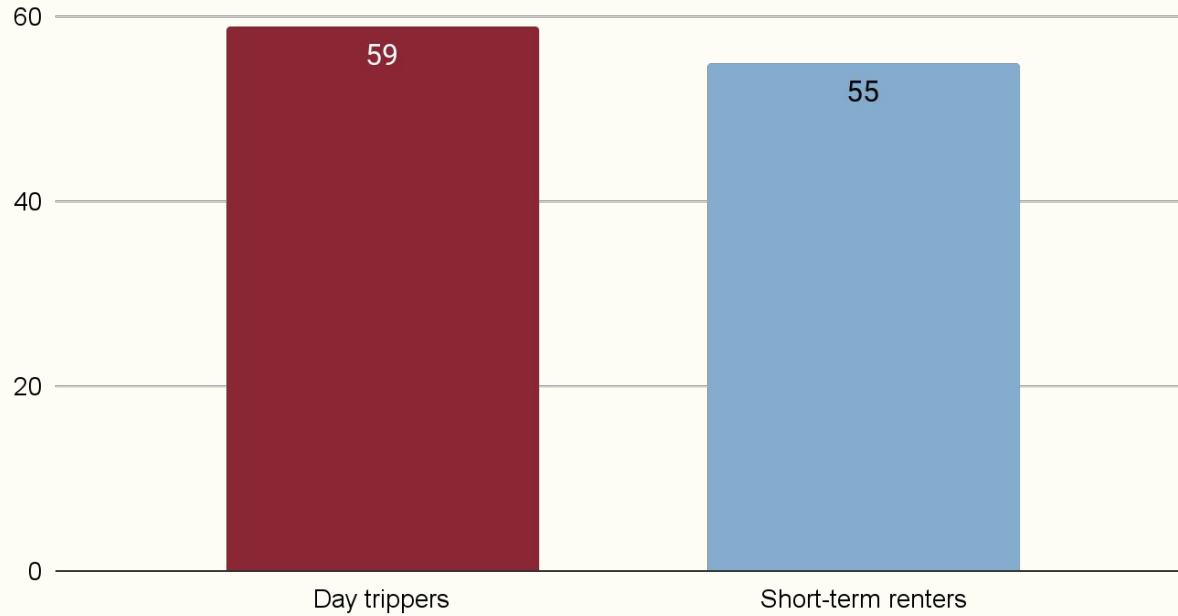
Five year average age

Hamilton County

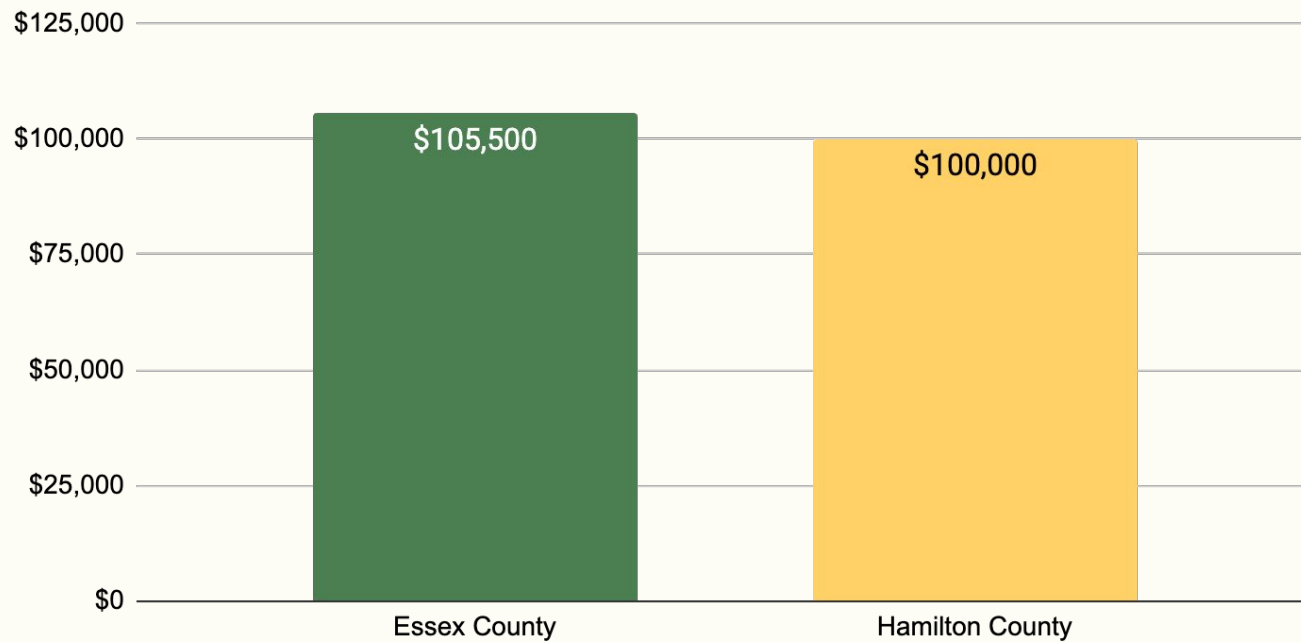


Average age

Day trippers / Short-term renters

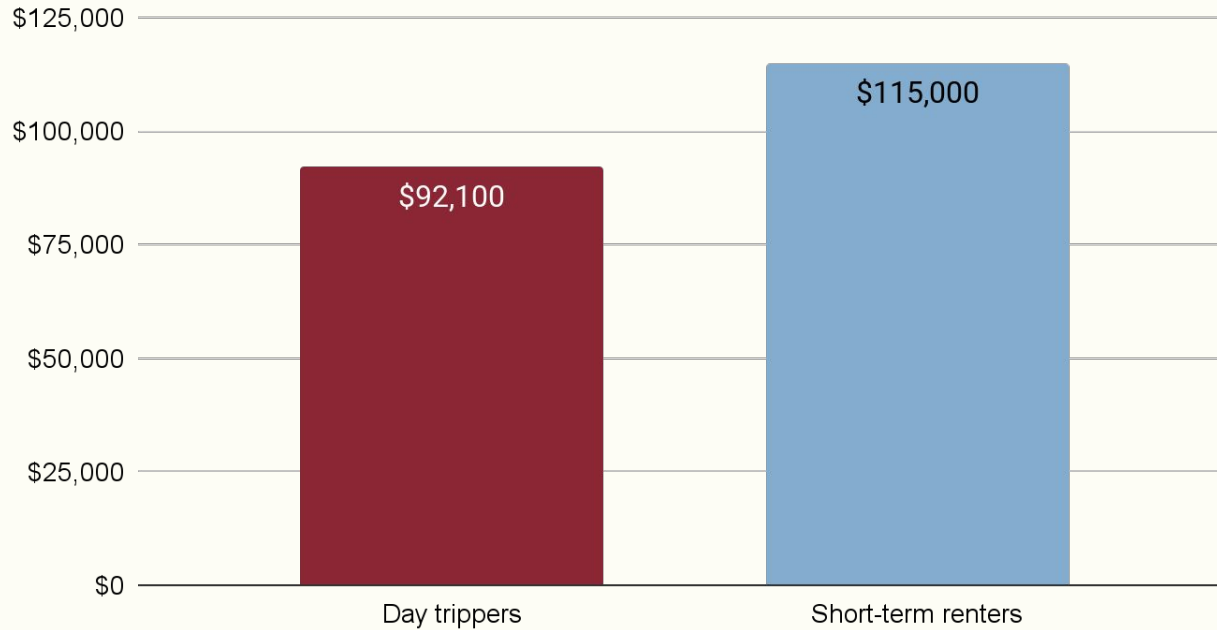


Median income

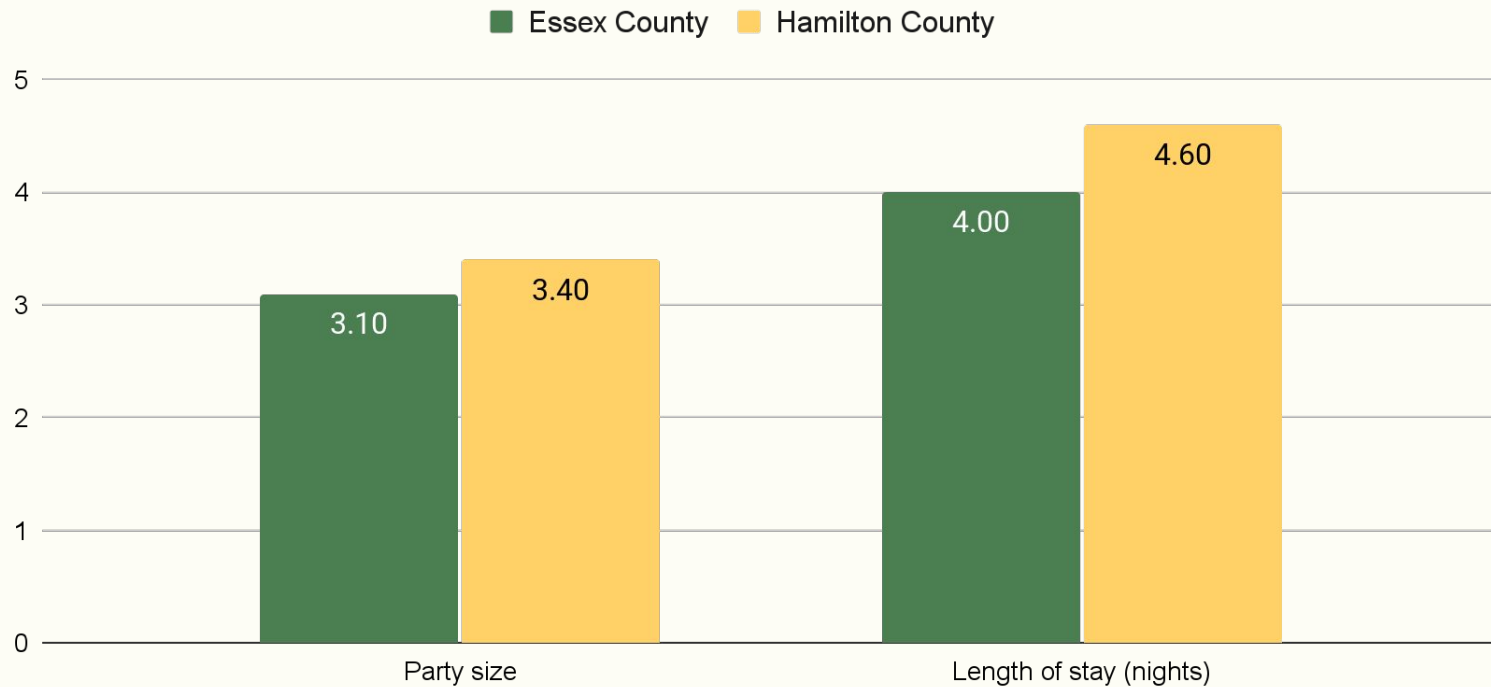


Median income

Day trippers / Short-term renters

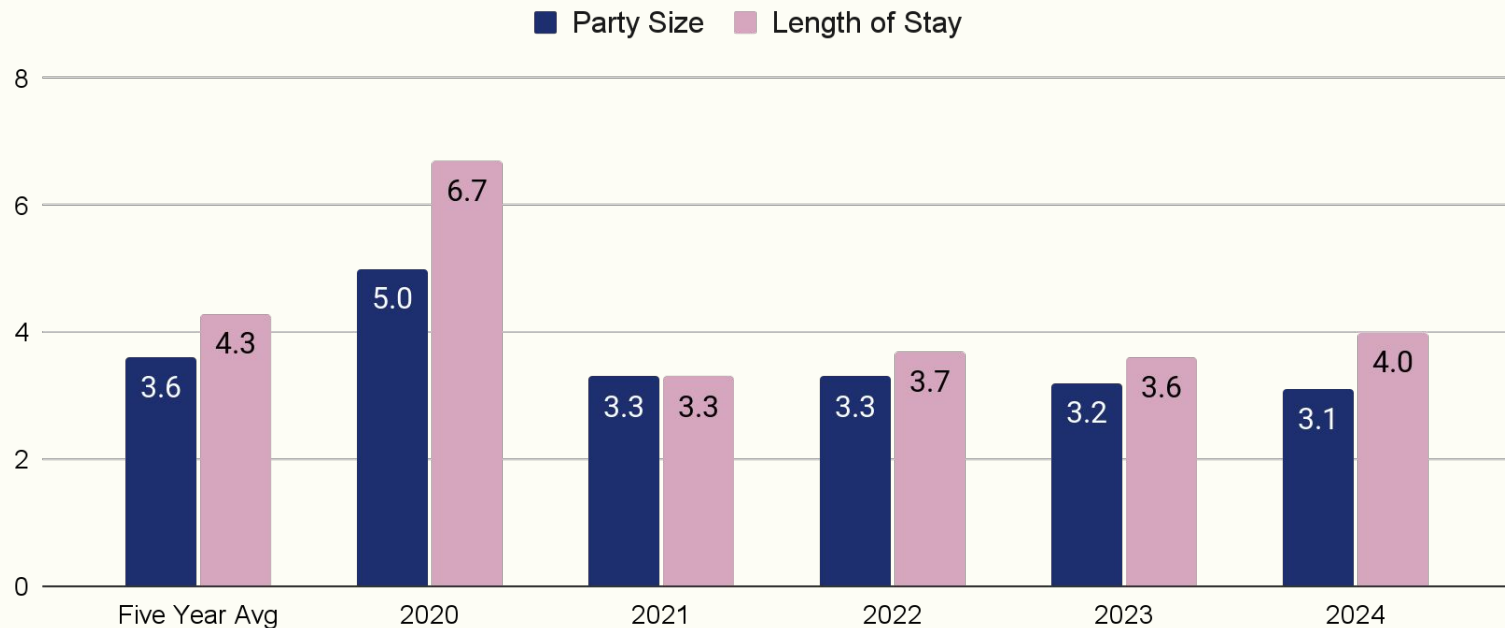


Party size / Length of stay



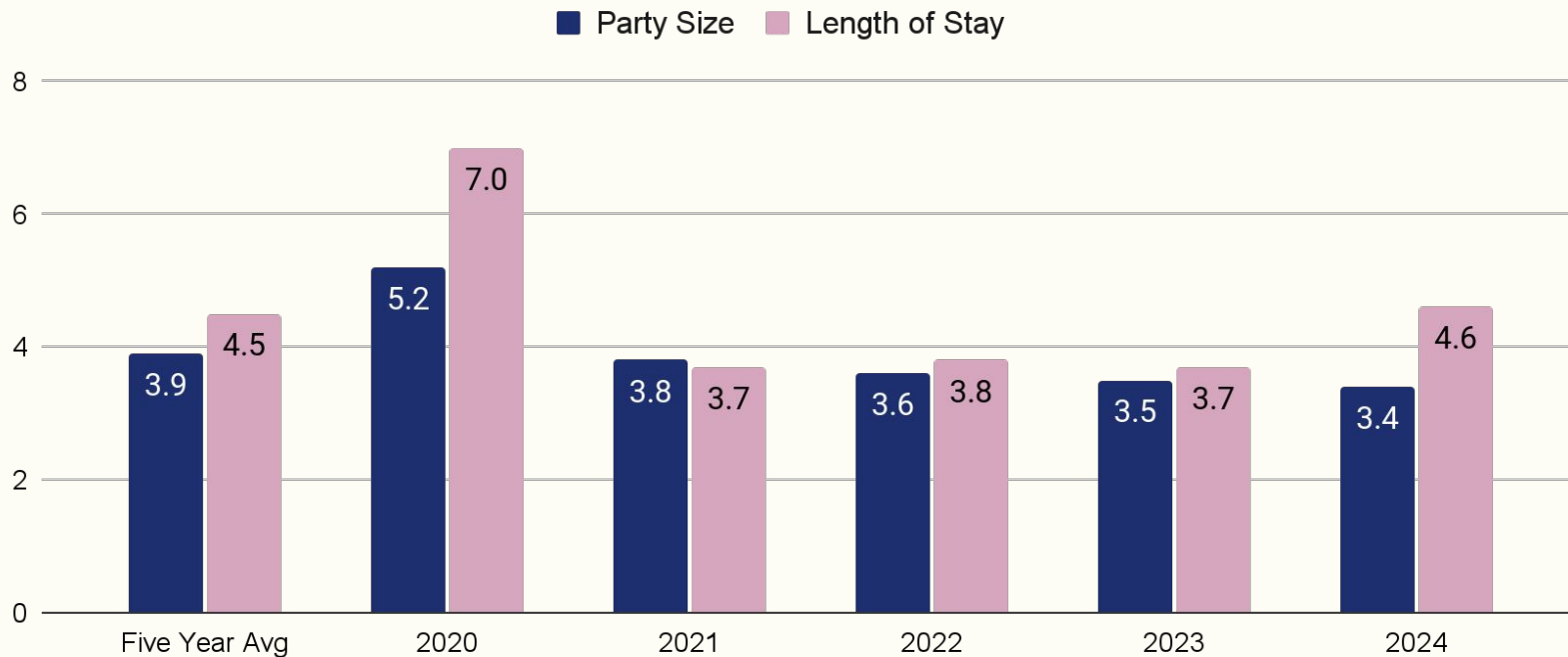
Five year average party size / Length of stay

Essex County



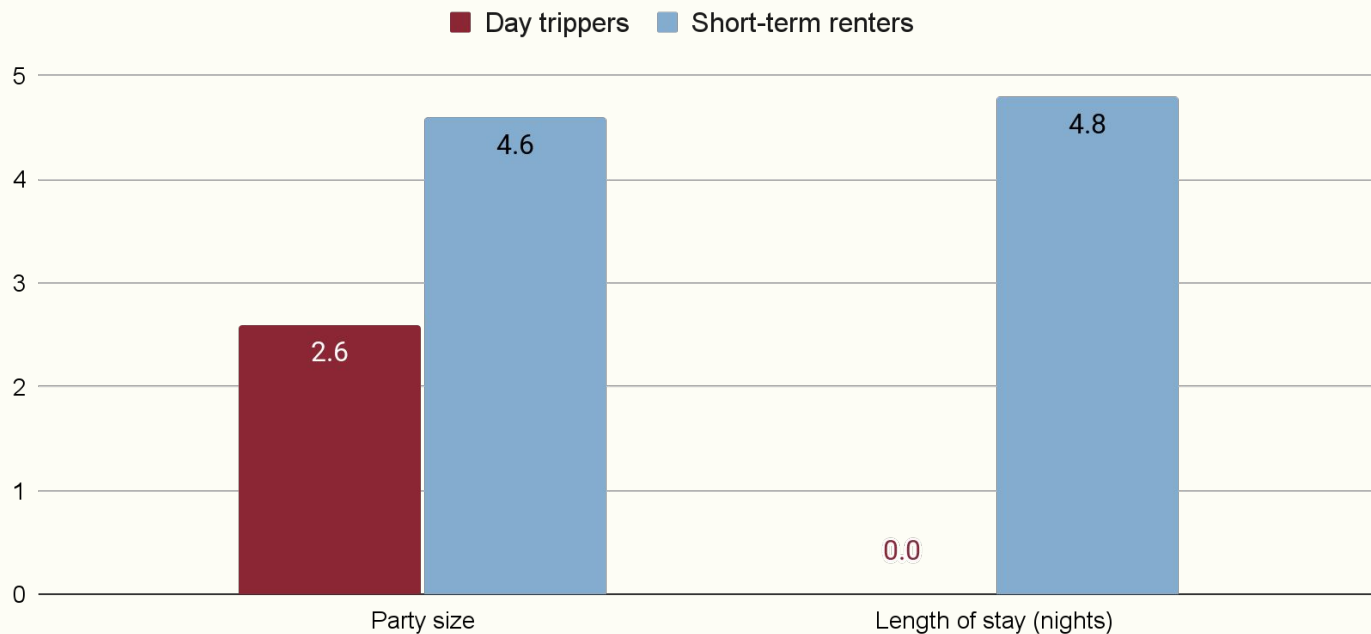
Five year average party size / Length of stay

Hamilton County

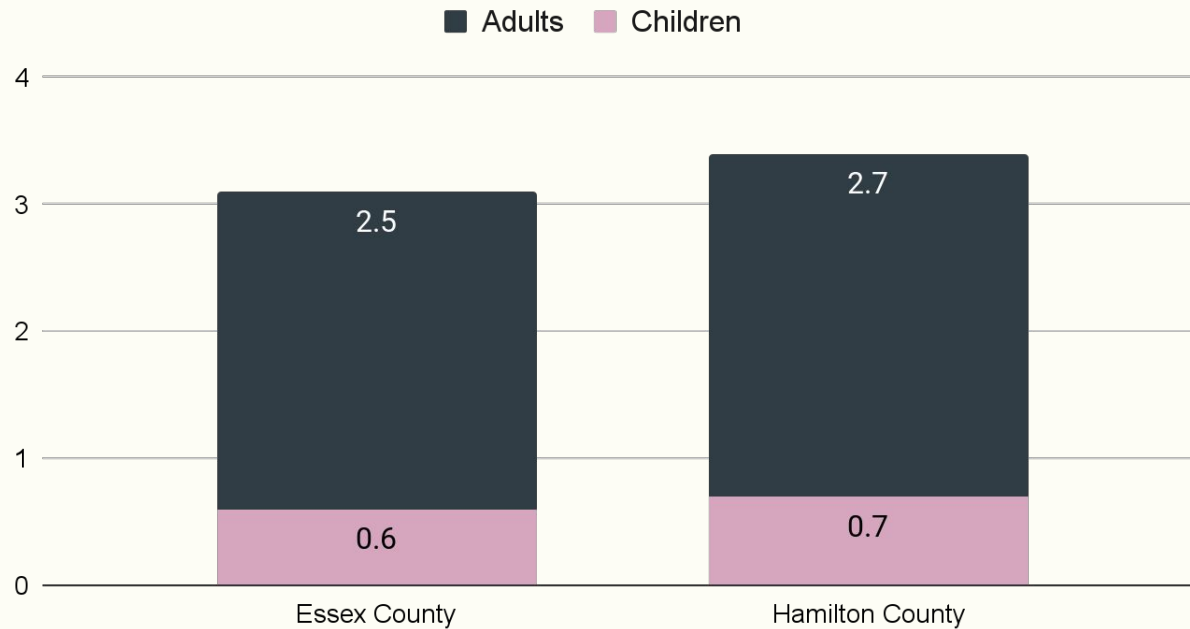


Party size / Length of stay

Day trippers / Short-term renters

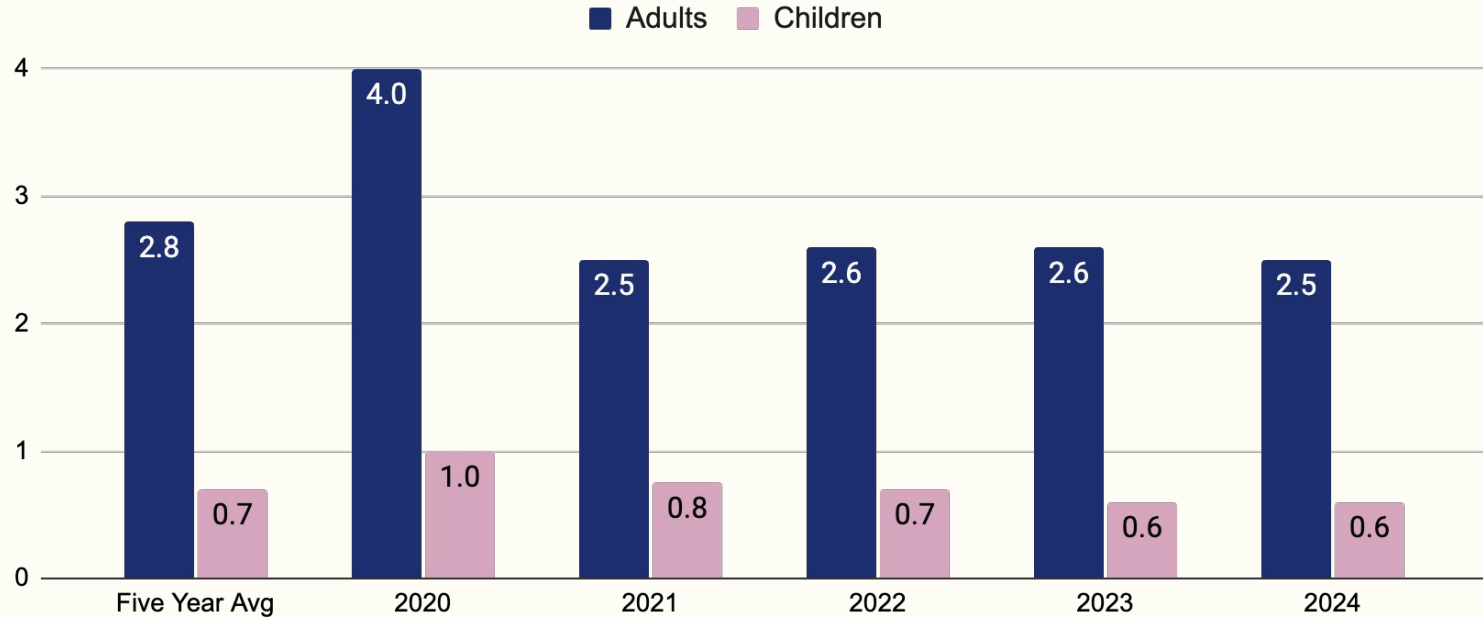


Party composition



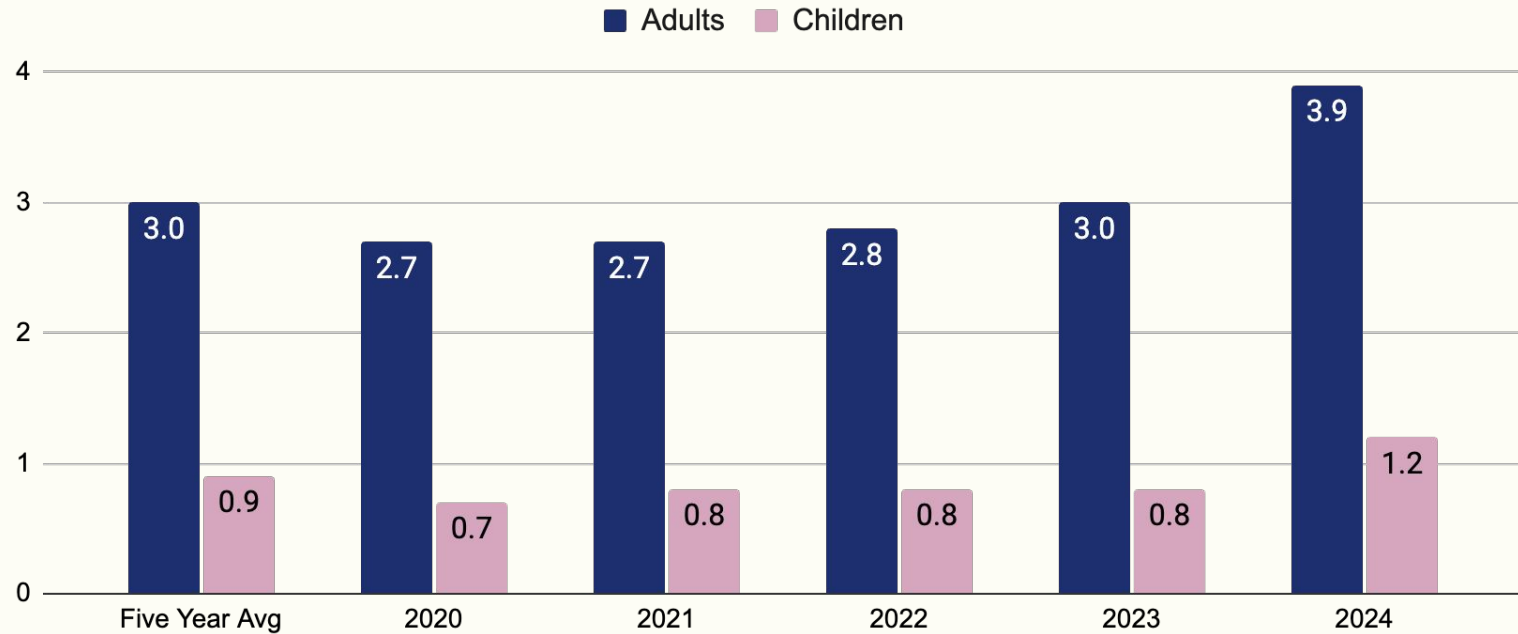
Five year average party composition

Essex County



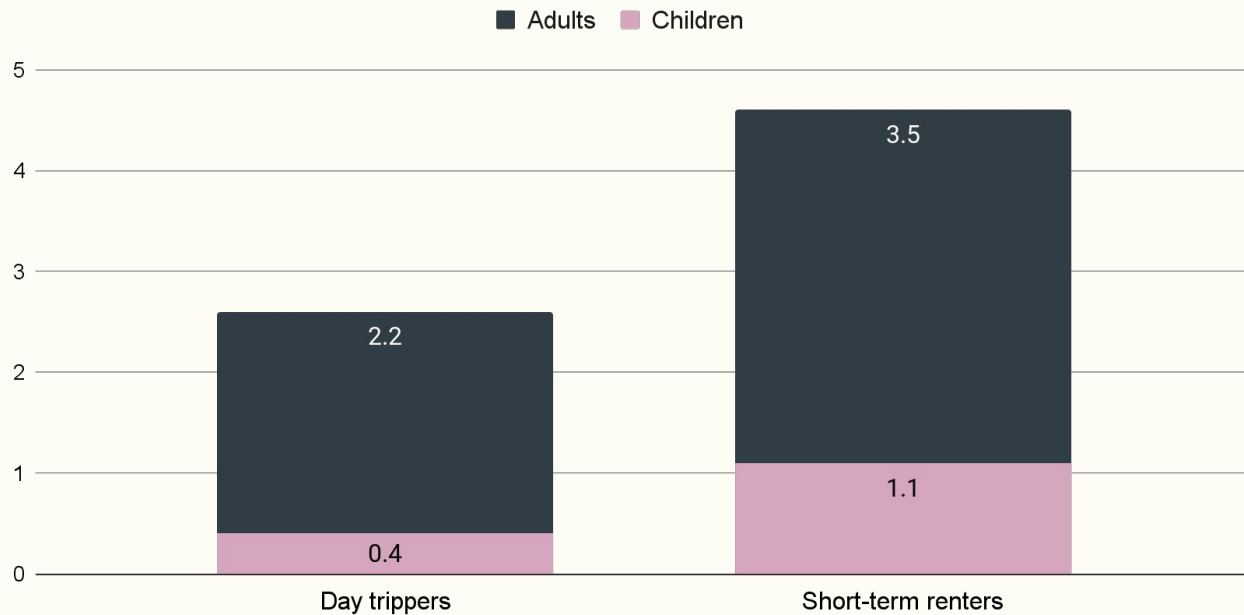
Five year average party composition

Hamilton County

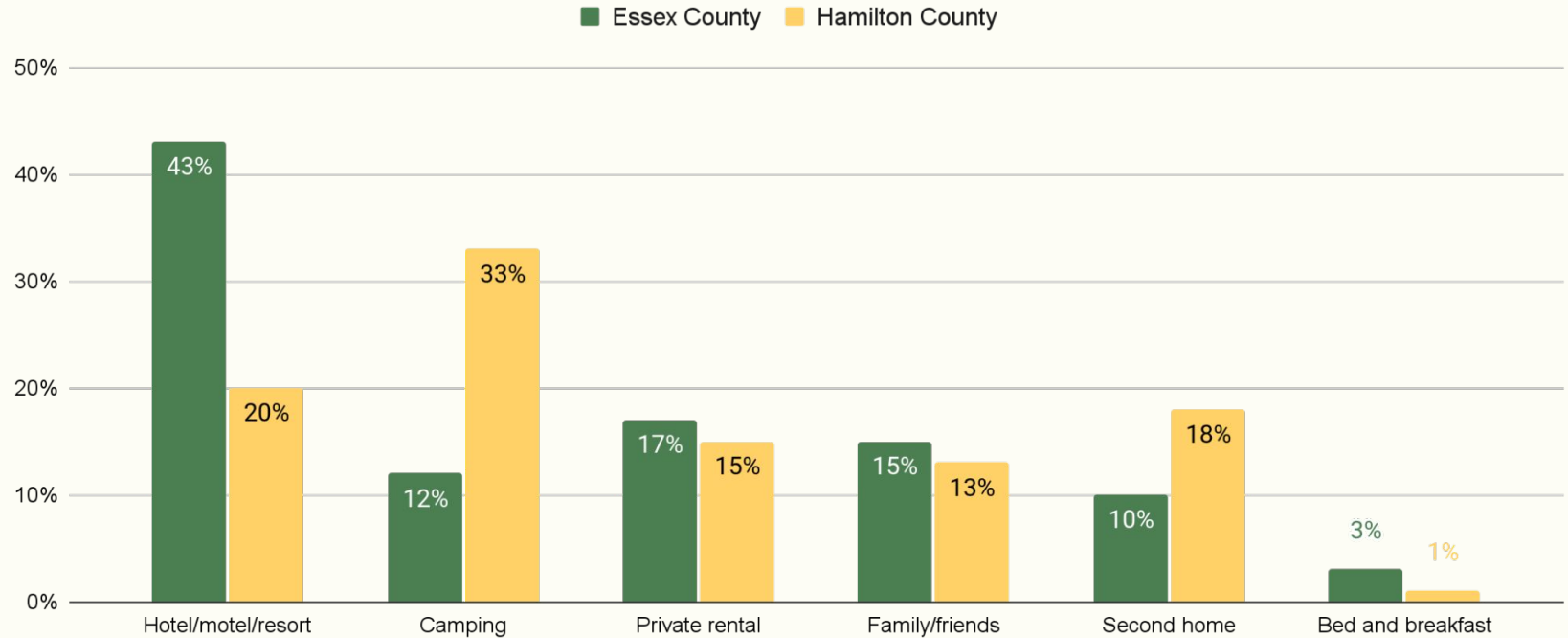


Party composition

Day trippers / Short-term renters



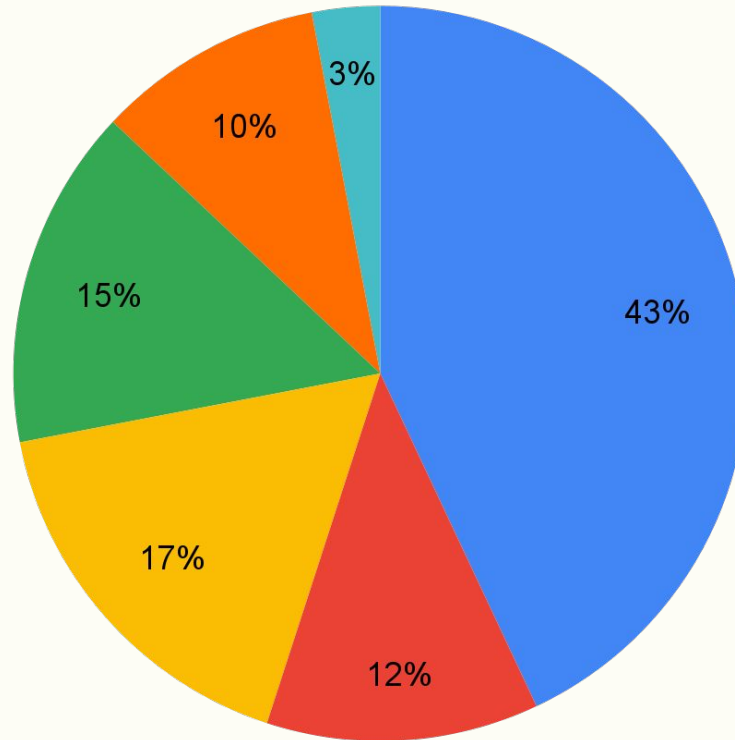
Lodging accommodations



Lodging accommodations

Essex County

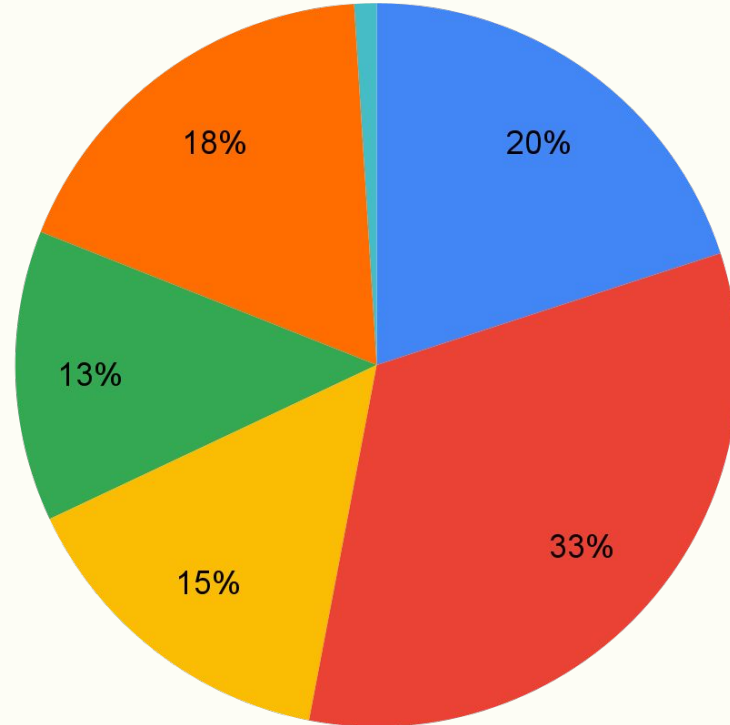
- Hotel/motel/resort
- Camping
- Private rental/short-term rental
- Family/friends
- Second home
- Bed and breakfast



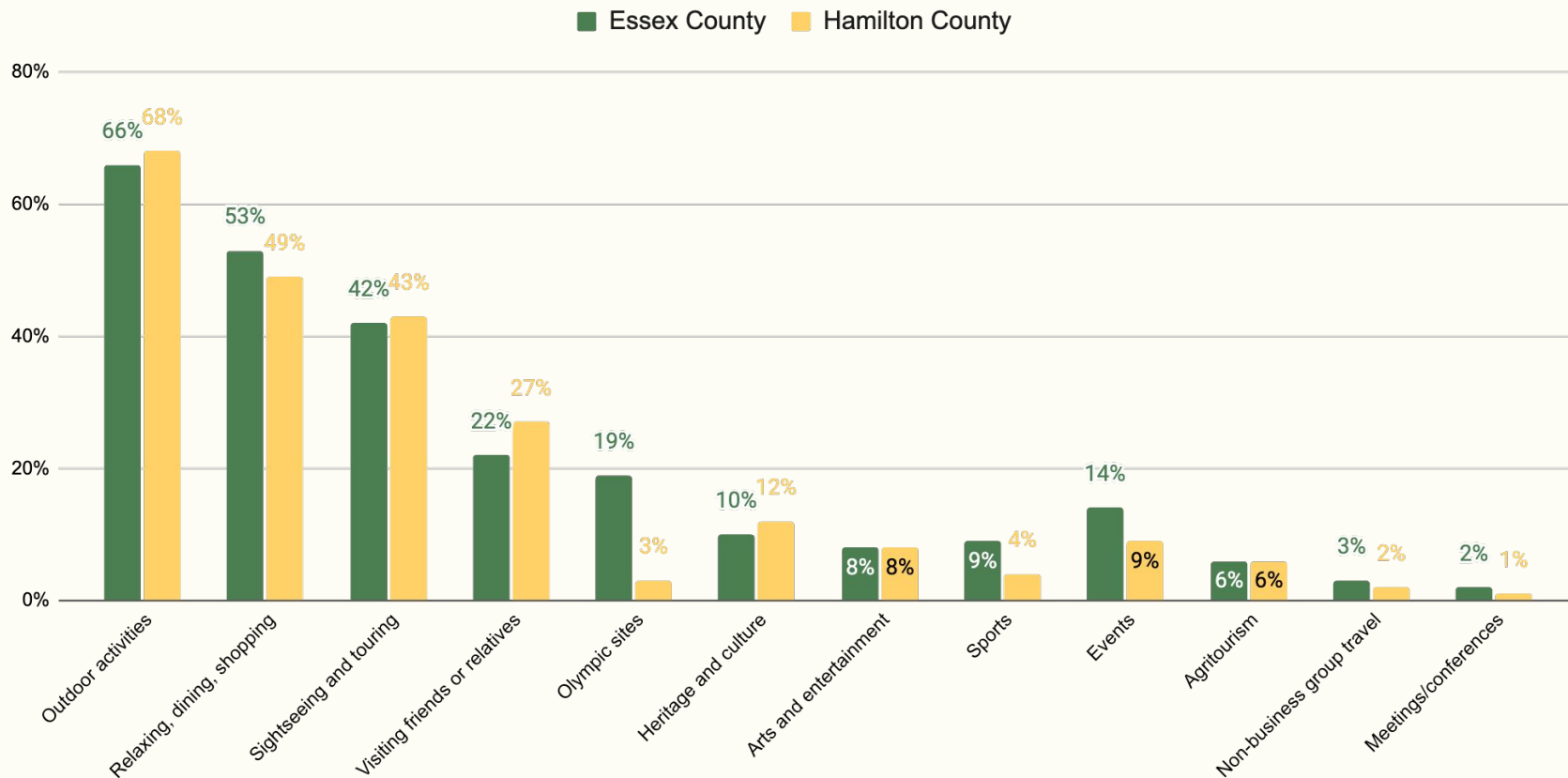
Lodging accommodations

Hamilton County

- Hotel/motel/resort
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- Family/friends
- Second home
- Bed and breakfast

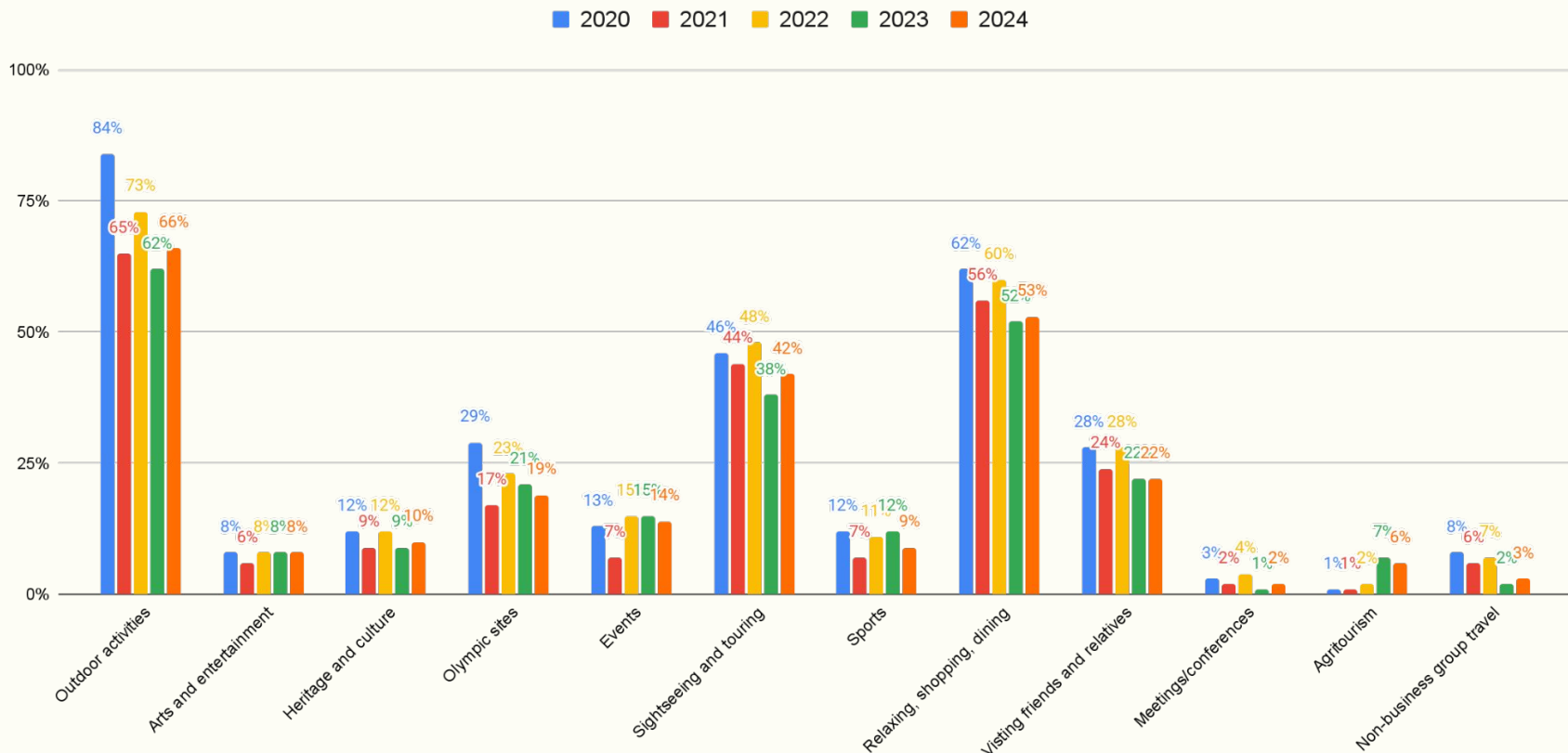


Key attractions



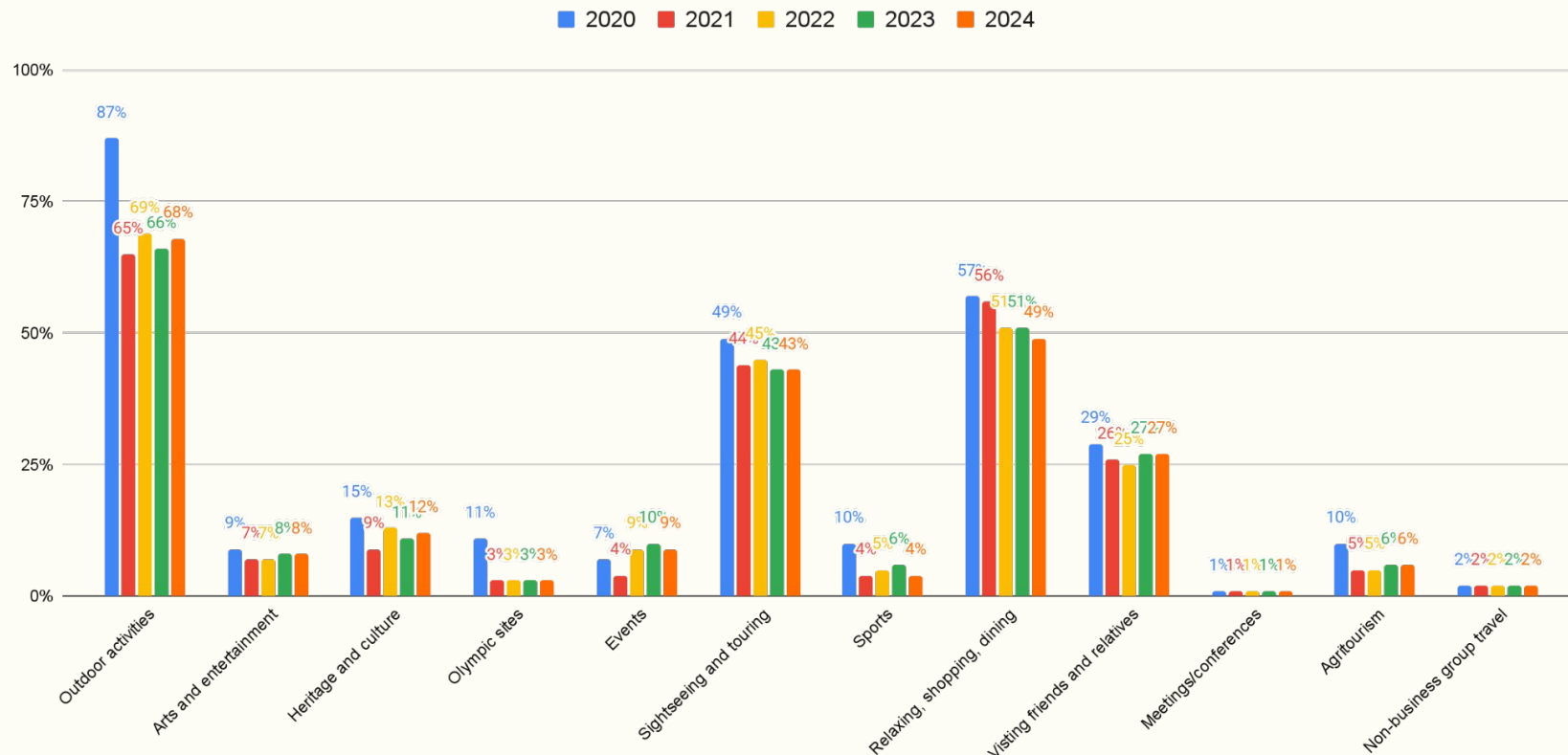
Five year key attractions

Essex County



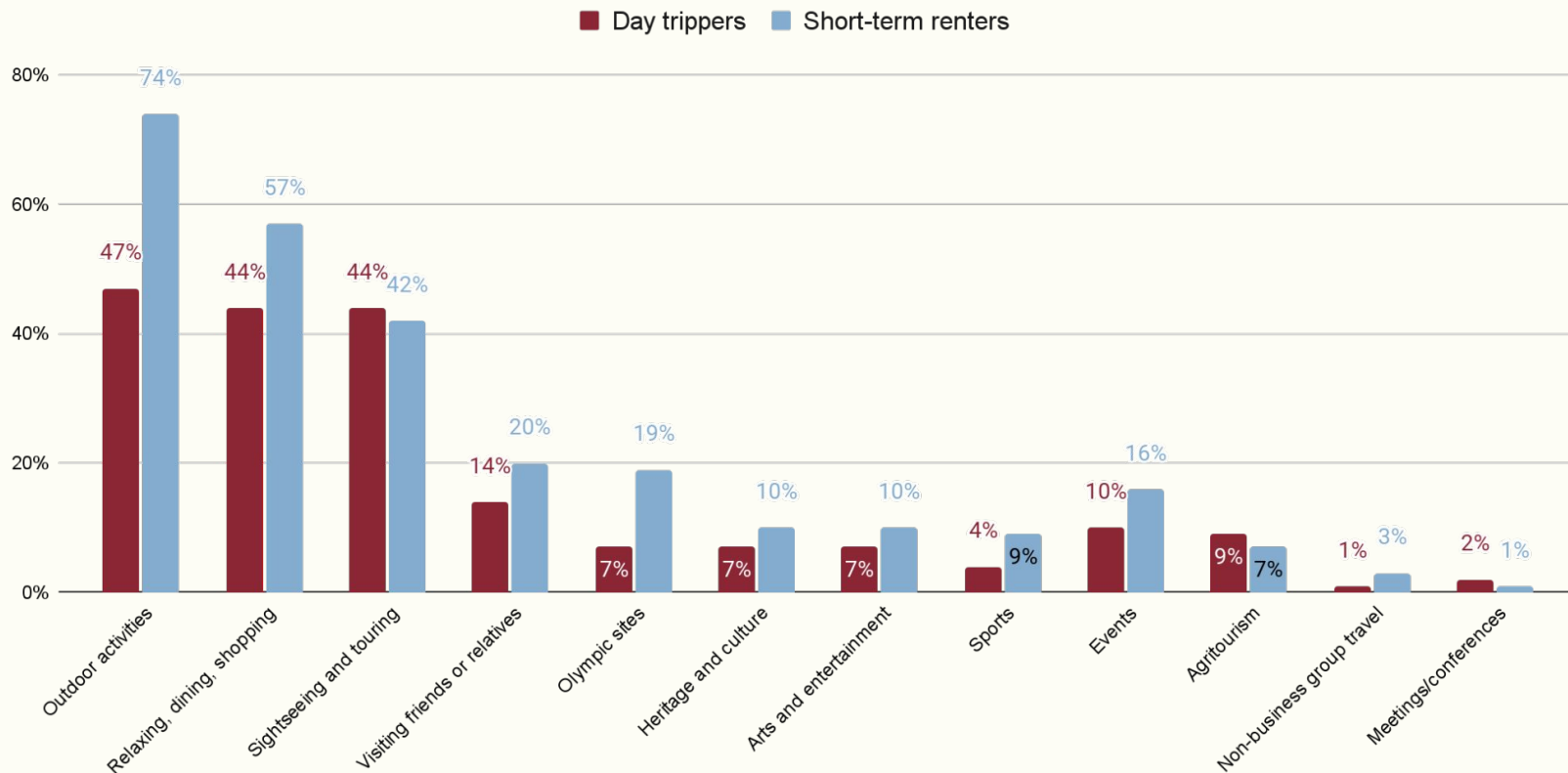
Five year key attractions

Hamilton County

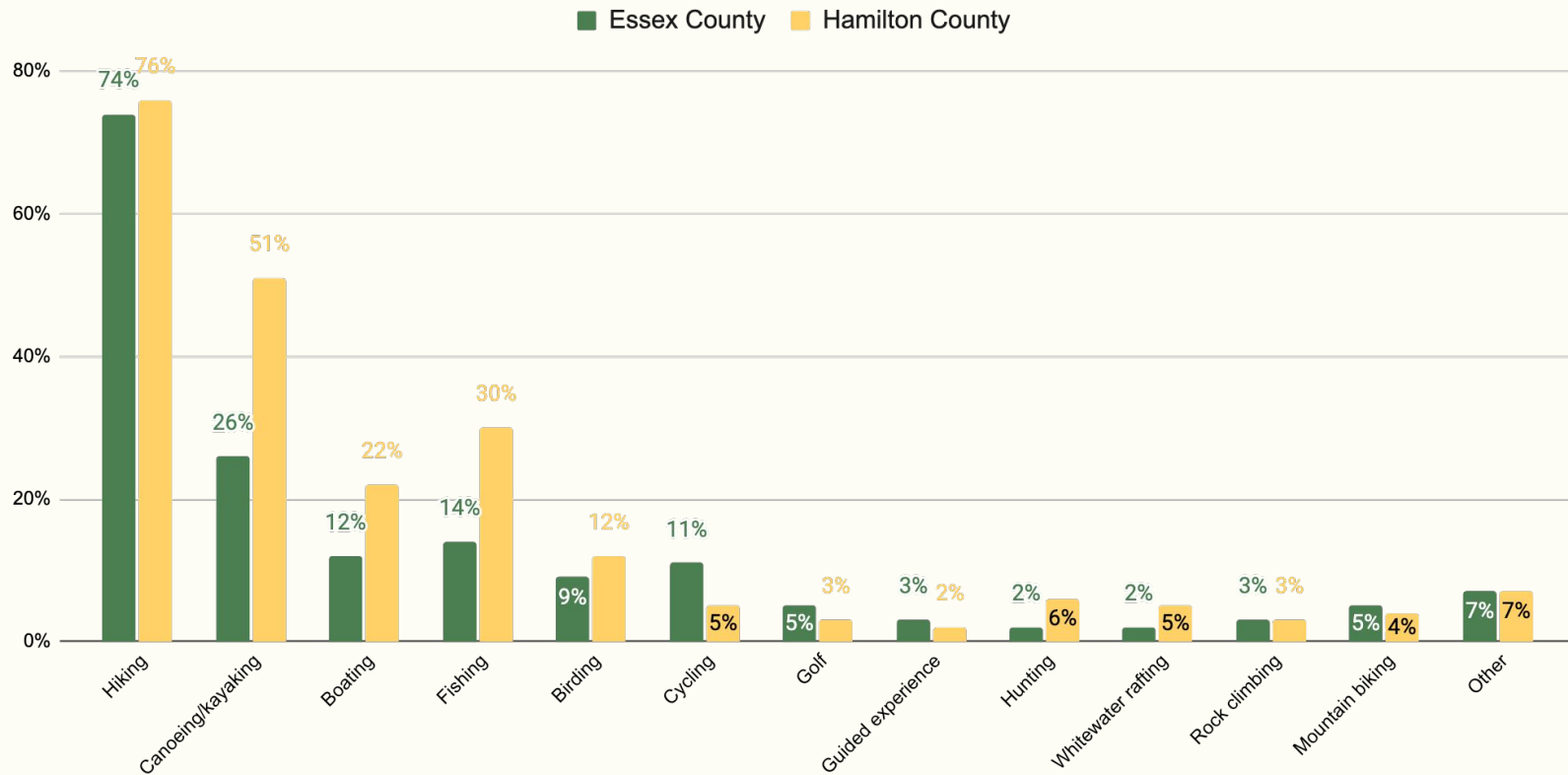


Key attractions

Day trippers / Short-term renters

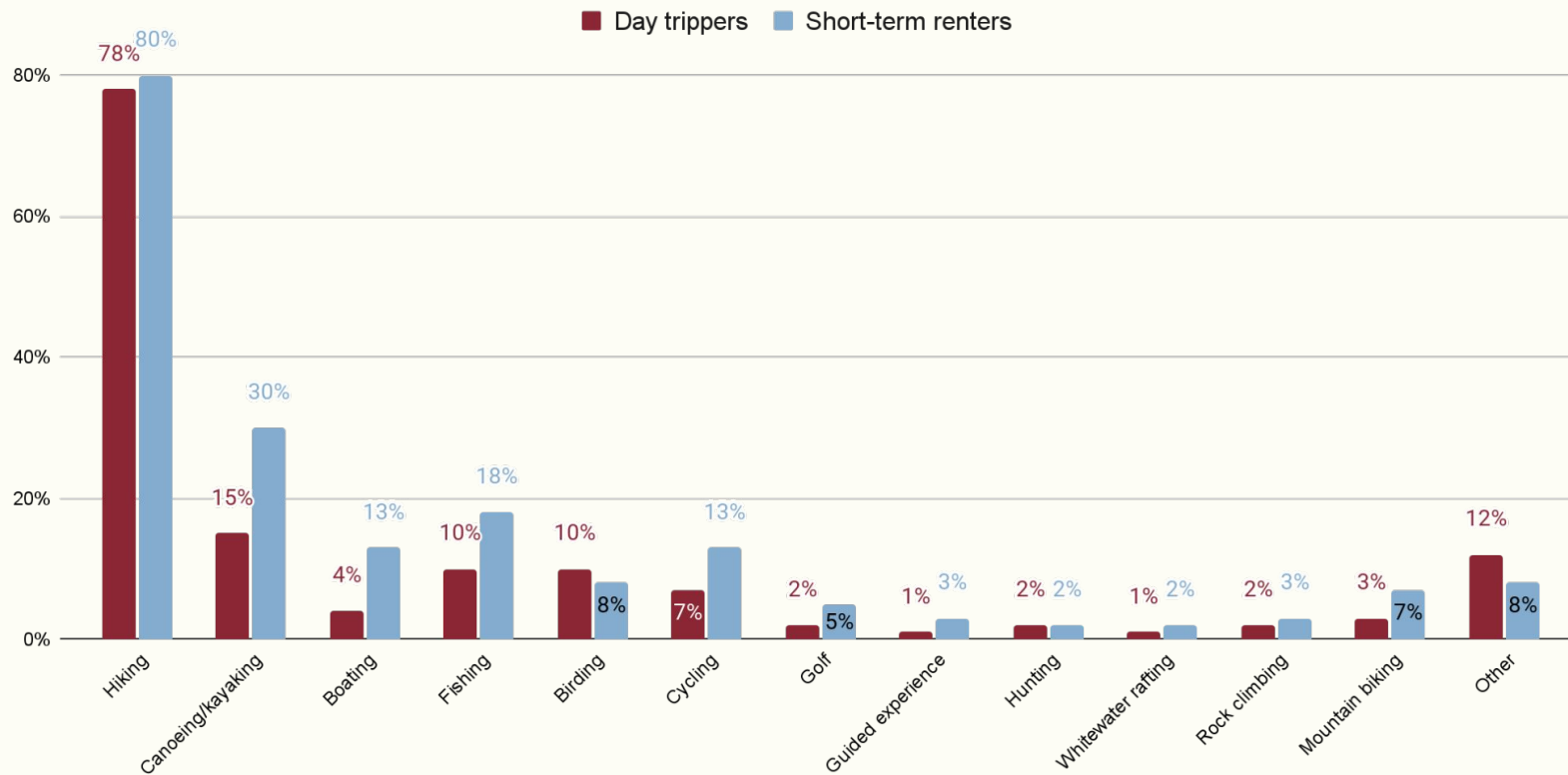


Outdoor Spring/Summer activities

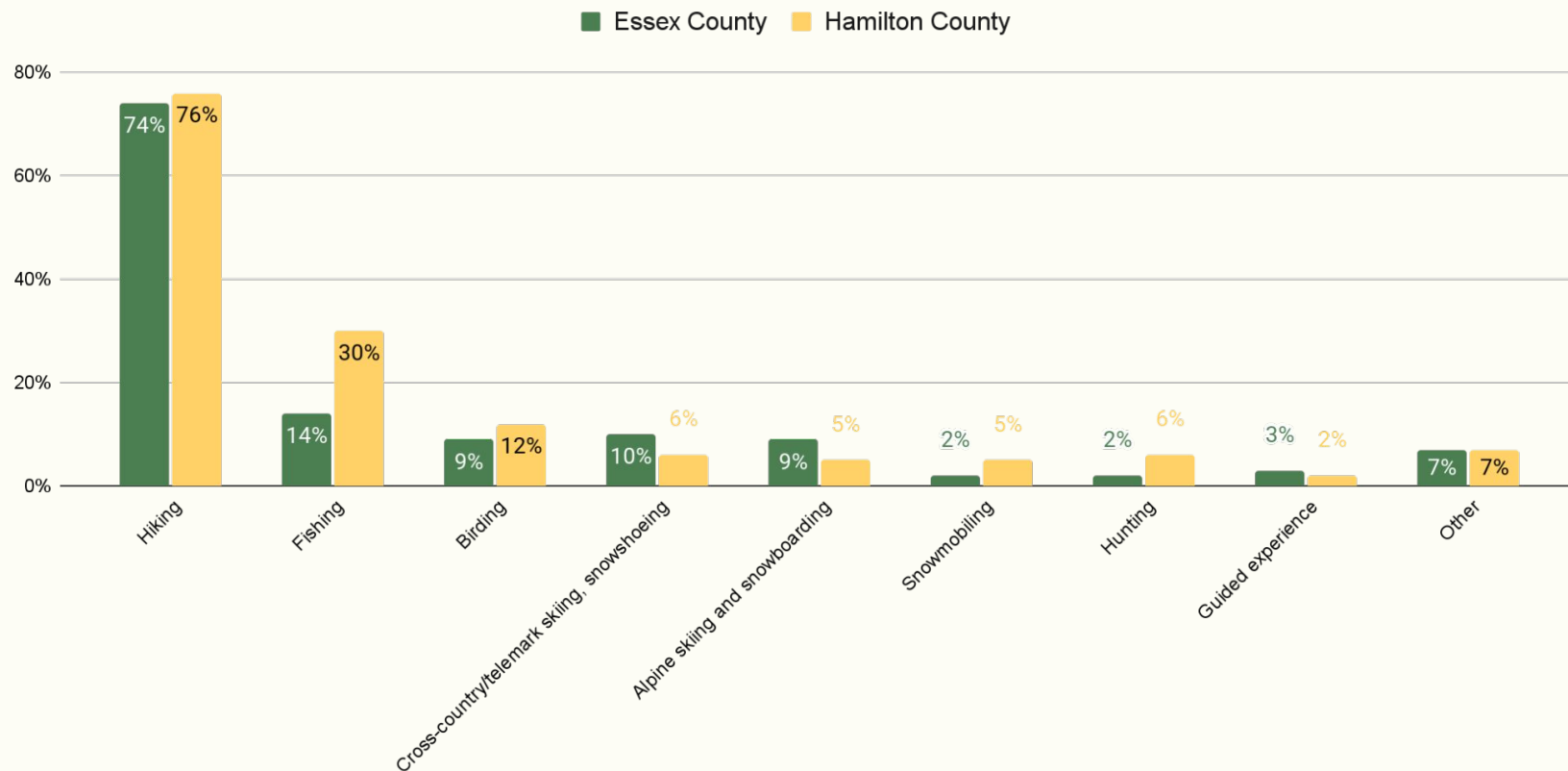


Outdoor Spring/Summer activities

Day trippers / Short-term renters

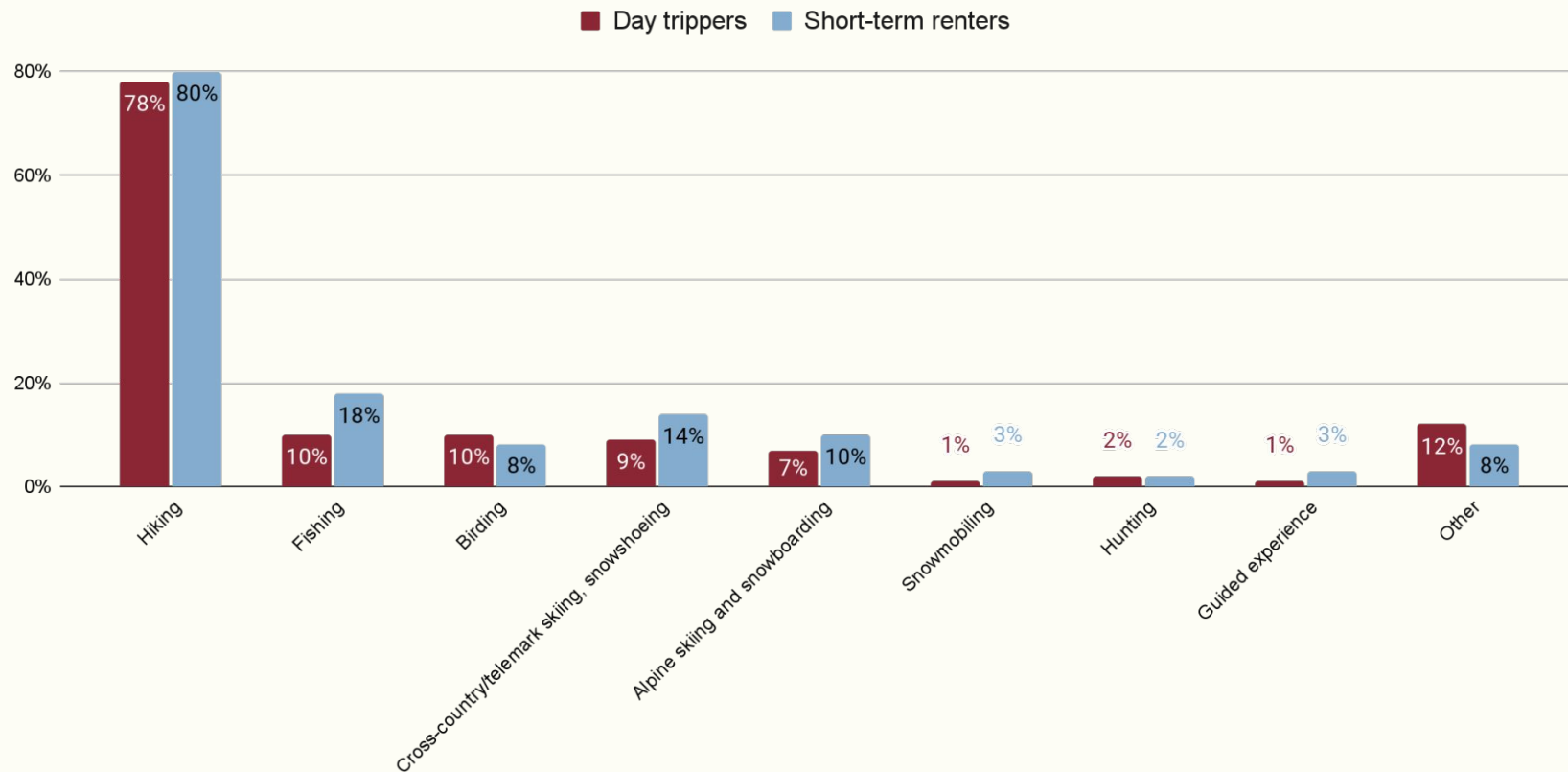


Outdoor Fall/Winter activities

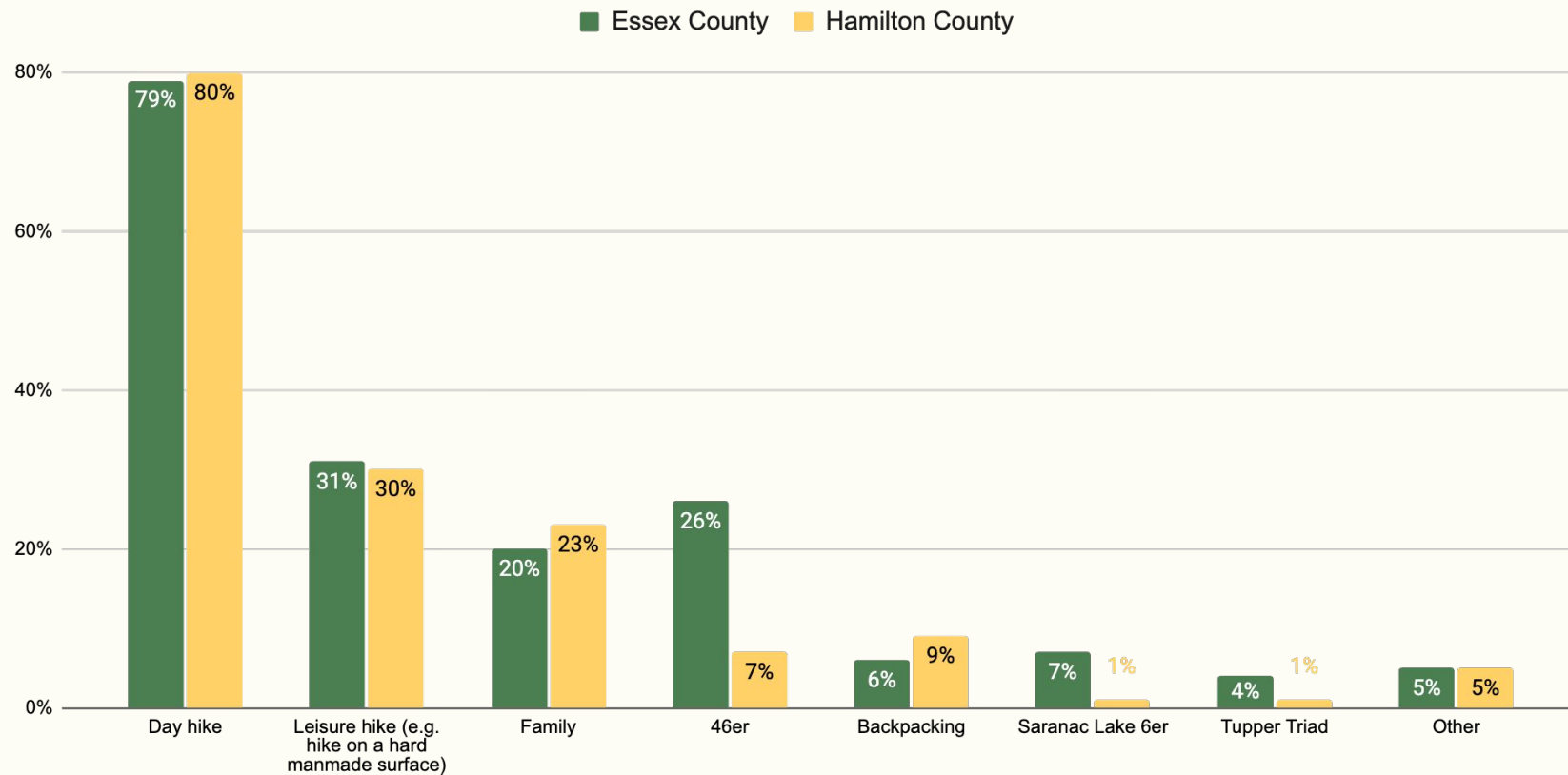


Outdoor Fall/Winter activities

Day trippers / Short-term renters

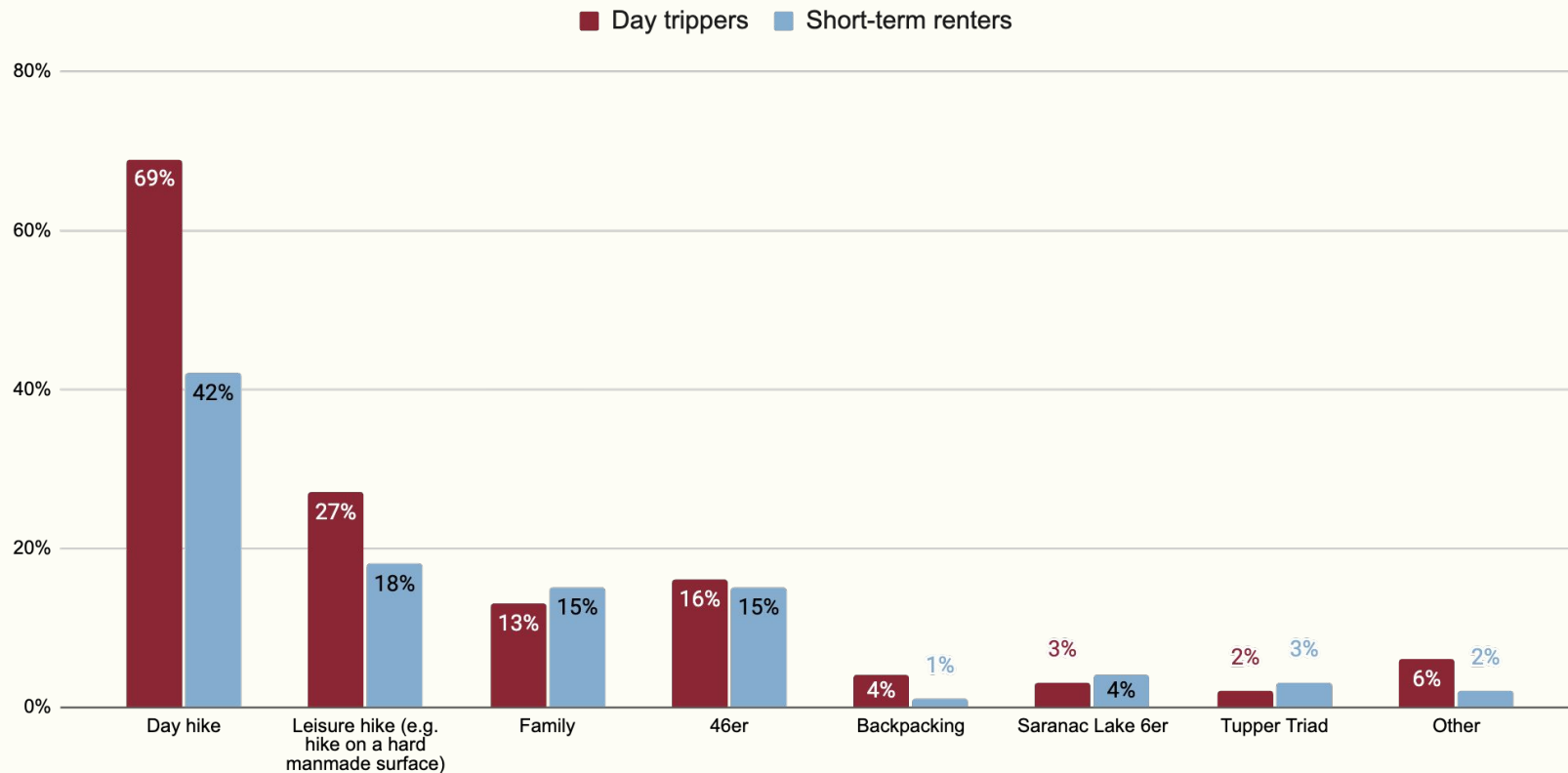


Hiking breakdown



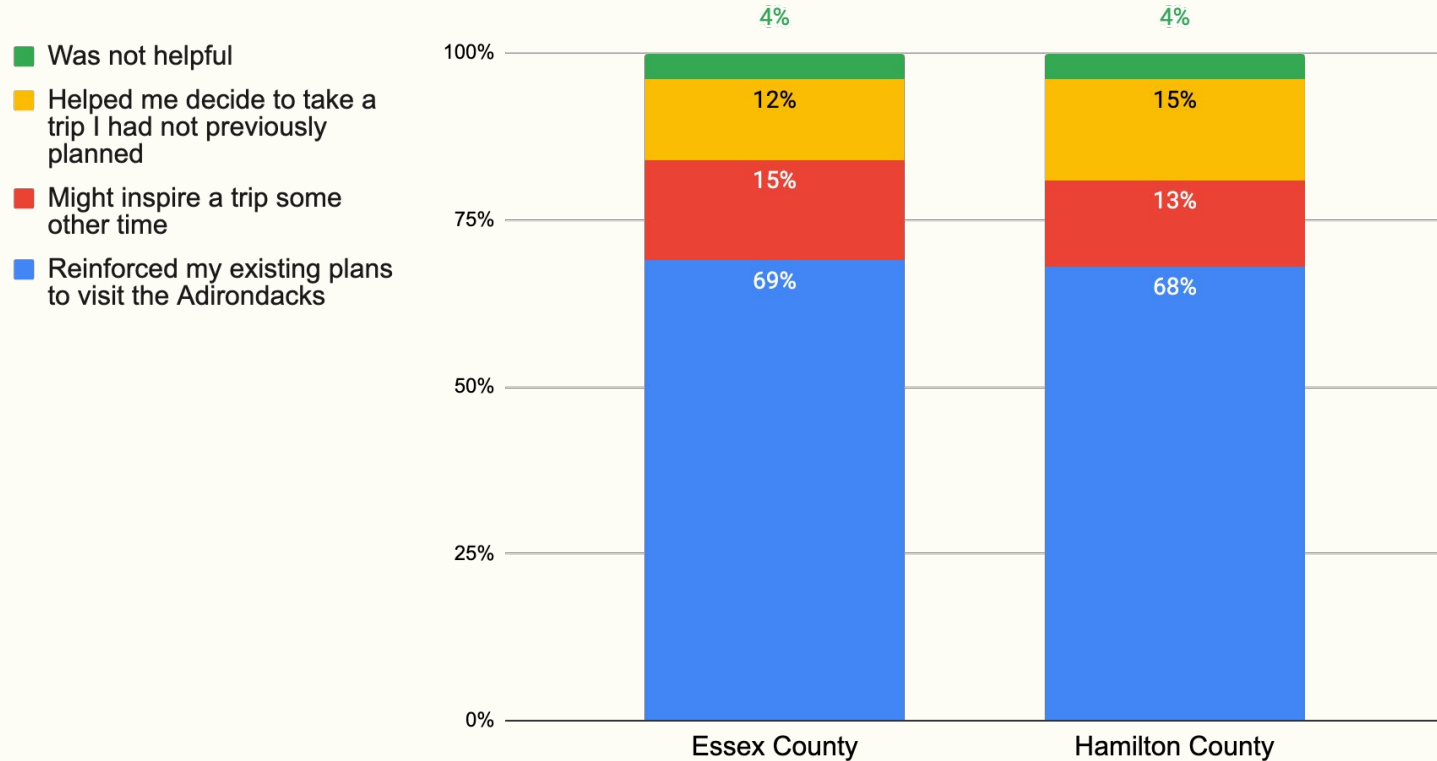
Hiking breakdown

Day trippers / Short-term renters



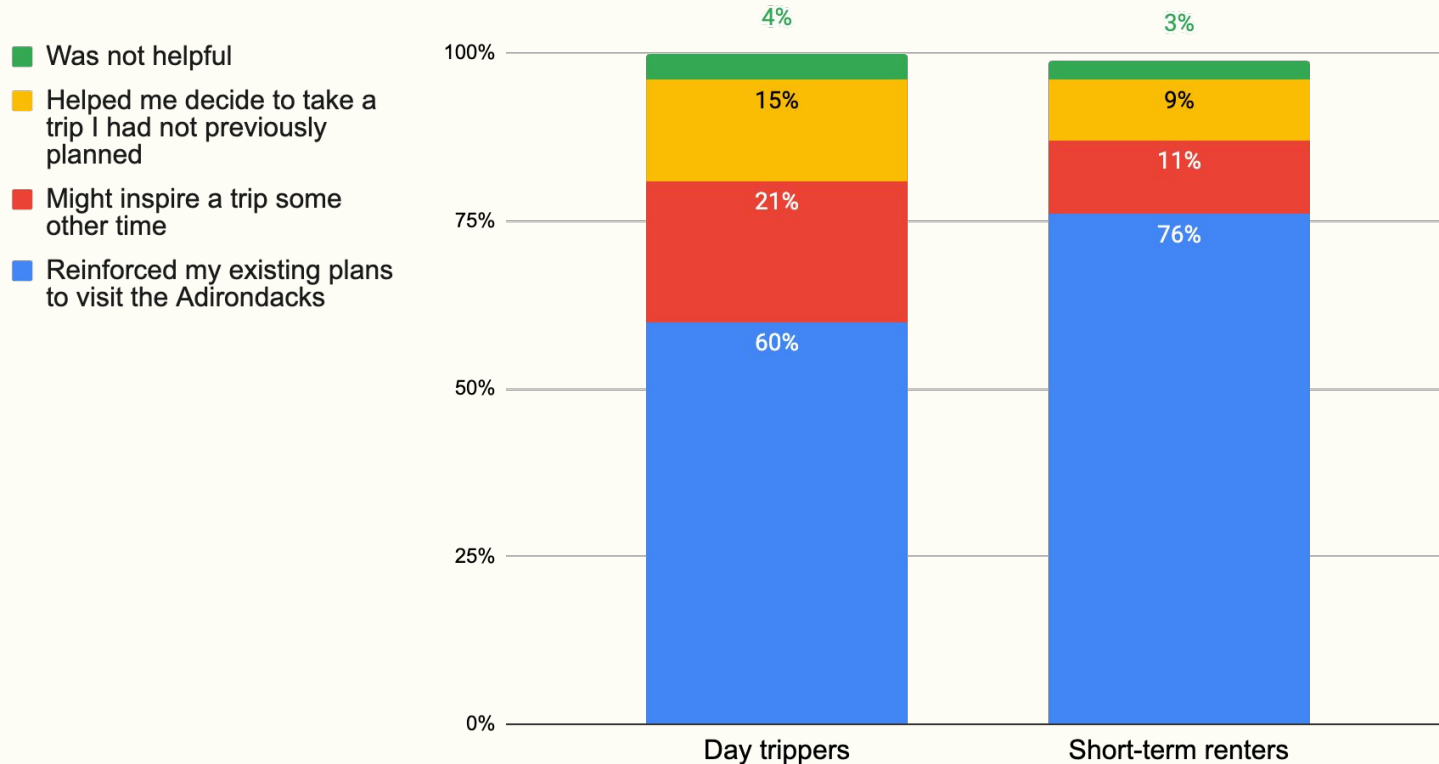
Conversion rate from viewing ROOST marketing materials

Essex and Hamilton counties



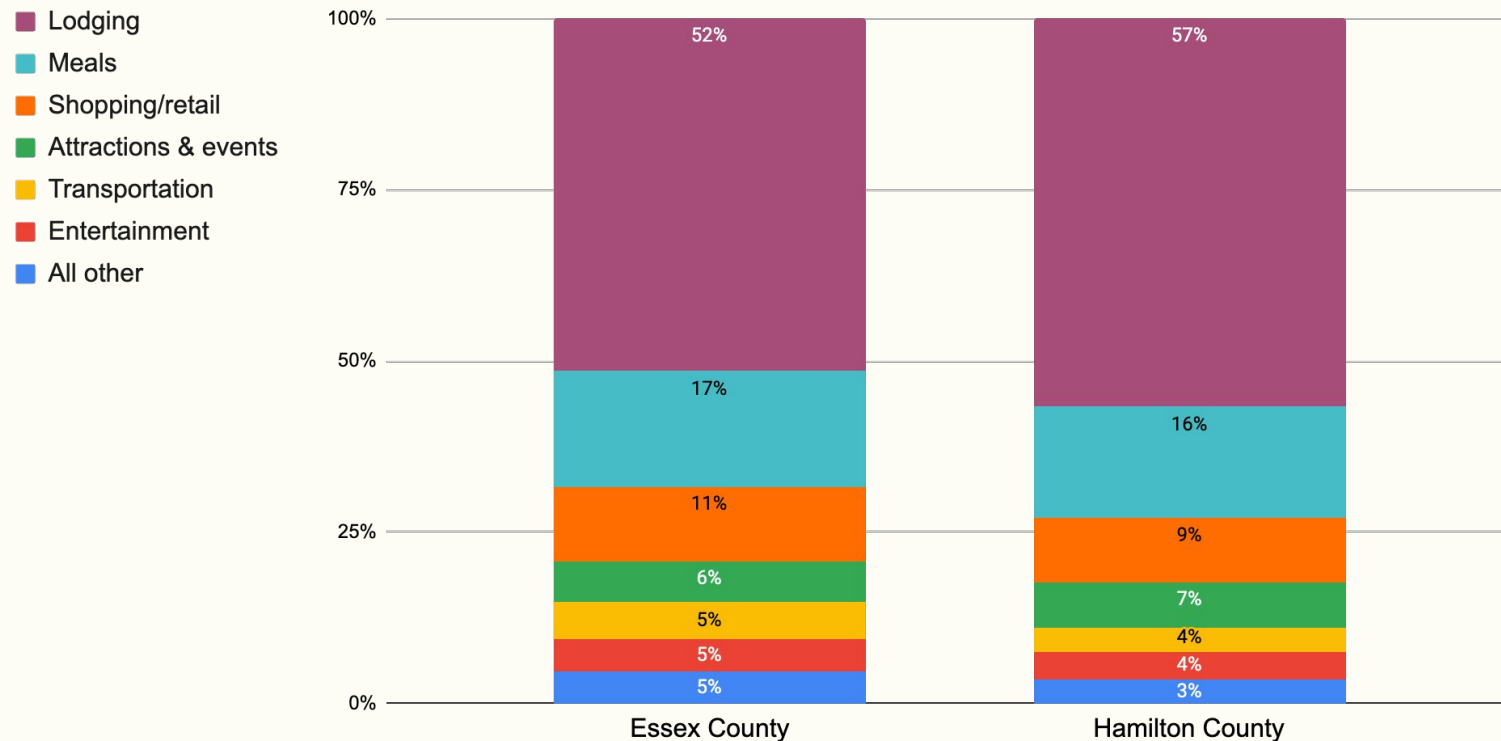
Conversion rate from viewing ROOST marketing materials

Day trippers / Short-term renters



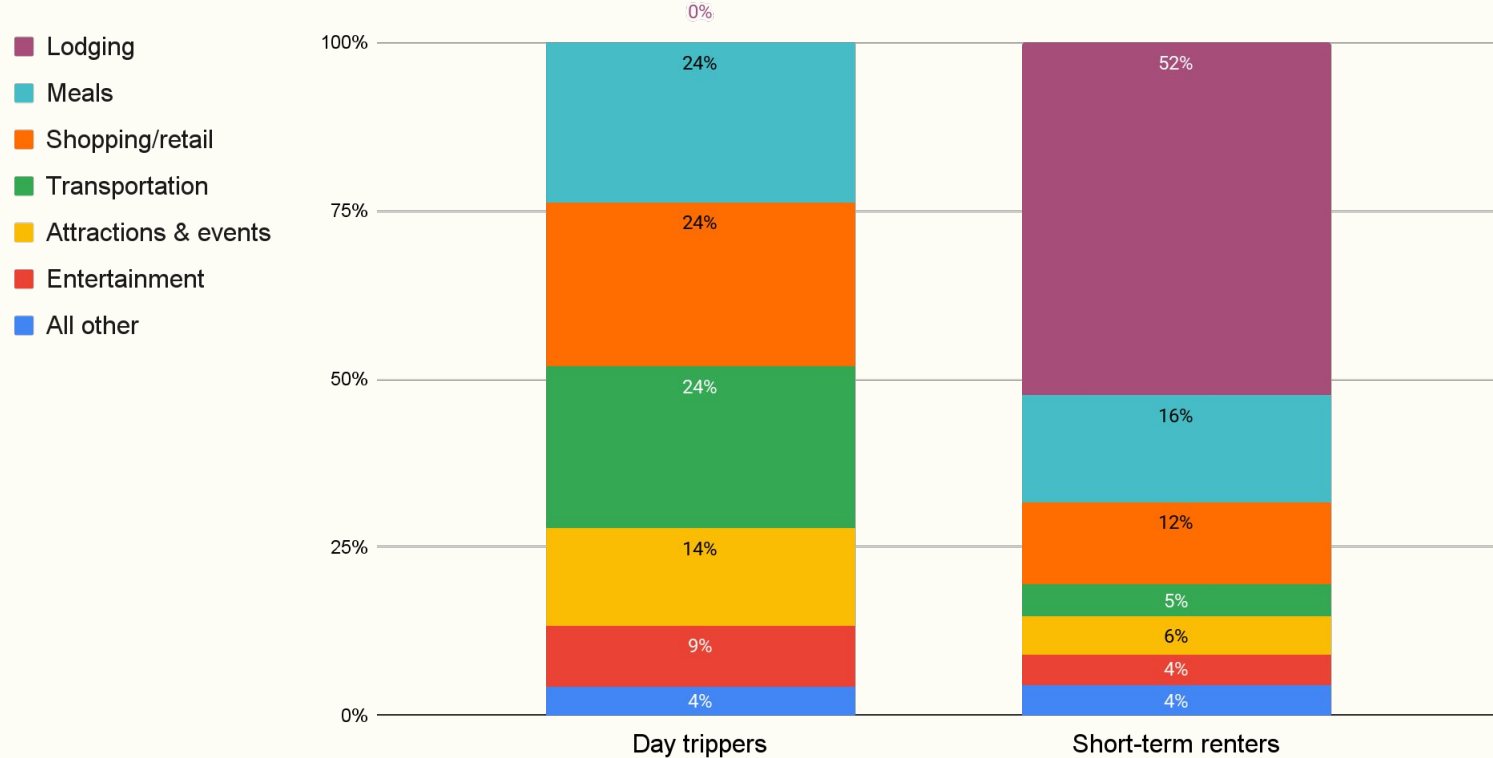
Total expenditure allocation by category

Essex and Hamilton counties



Total expenditure allocation by category

Day trippers / Short-term renters



Mean party expenditures

	Essex County	Hamilton County
Lodging	\$945	\$819
Meals	\$308	\$234
Shopping/retail	\$199	\$135
Transportation	\$96	\$53
Entertainment	\$89	\$58
Attractions & events	\$112	\$95
All other	\$85	\$50
Average daily expenditure	\$459	\$314
Average total expenditure	\$1,834	\$1,444

Five year mean party expenditures

Essex County

	2020	2021	2022	2023	2024	Five year average
Lodging	\$910	\$679	\$950	\$895	\$945	\$876
Meals	\$449	\$287	\$311	\$331	\$308	\$337
Shopping/retail	\$274	\$215	\$220	\$225	\$199	\$227
Transportation	\$71	\$95	\$140	\$112	\$96	\$103
Entertainment	\$67	\$83	\$94	\$109	\$89	\$88
Attractions & events	\$57	\$83	\$100	\$108	\$112	\$92
All other	\$10	\$40	\$80	\$98	\$85	\$63
Average daily expenditure	\$283	\$464	\$512	\$536	\$459	\$451
Average total expenditure	\$1,838	\$1,482	\$1,895	\$1,768	\$1,834	\$1,786

Essex County Visitor Profile



Visitor profile

Essex County

- The average visitor party age of respondents was 58 years old, slightly older from the prior year (57).
- The average reported total traveler party size was 2.5 adults and 0.6 children for a total average of 3.1. This is consistent with party size data from the last several years.
- Sixty-five percent of visitors (65%) reported that they were New York state residents, which is slightly lower than reported in the prior year (67%).
- Northern New York and the Capital District continue to be the most frequently reported visitors from within the state at nearly 74%, followed by downstate/NY metro at 9%, and central and western New York visitors at 8% each.
- Northeastern state visitors outside of New York state rose to one out of four (25%) respondents, up from 20% in 2023.

Visitor profile

Essex County

- Canadian visitation included 4% from Quebec and 3% from Ontario, consistent from the prior year.
- The average duration of stay reported by 2024 visitors was 4 nights which is slightly longer than reported by 2023 visitors (3.7 nights).
- Hotels/motels remained the most reported lodging choice among 2024 visitor respondents (43%).
- Short-term rentals were reported as the second-most common lodging choice used by 17% of respondents. This is the second consecutive year this figure dropped (18% in 2023) following many years of gains.
- The most commonly reported draw to visit the region continues to be outdoor activities, with 66% of respondents selecting this reason for interest in visiting the area, up from 62% in 2023.

Visitor profile

Essex County

- Nearly three out of four (74%) respondents indicating that they came to the area for outdoor activities stated that hiking was an activity of primary interest. Canoeing or kayaking was the next most commonly cited outdoor interest (26%), followed by fishing (14%), boating (12%) and cross-country skiing/snowshoeing (10%).
- Those who responded that they were interested in arts and entertainment were asked what types of arts activities were of interest. The strongest area of interest was live music (33% of responses), followed by visiting art galleries (23%), art studios (12%), and live theater (10%).
- The average daily traveler party spending in 2024 is estimated at \$459 per day. This is lower than \$536 in 2023, but still above the five-year average (\$451).
- The total average estimated trip expenditure was \$1,834 slightly lower than the total reported average trip expenditure from the prior year (\$1,878).
- Reported spending on lodging rose from the prior year, from an average of \$895 to \$945. All other expenditure categories (except transportation) declined.

Hamilton County Visitor Profile



Visitor profile

Hamilton County

- Average traveler party age of respondents was 61 years old, slightly higher than reported in recent years (59 years).
- The average reported total traveler party size dropped for the second year among 2024 visitor respondents, to 2.7 adults and 0.7 children, or 3.4 overall.
- Visitation by respondents from within New York state stayed consistent with the last several years at 81% of respondents. Half (50%) reported coming from northern New York counties. Twenty-five percent (25%) reported from central New York state. Thirteen percent percent reported from western New York and 12% from New York City/metro and downstate New York.
- Northeastern state visitors from outside of New York rose for the third year slightly, to 15% of respondents.
- Less than 1% of respondents reported from Canada.

Visitor profile

Hamilton County

- Average stay length reported by 2024 travelers is 4.6 nights which is higher than the prior year (3.7) and the five-year average of 4.5 nights.
- Camping/RV continued to be the most commonly reported lodging choice among visitors and increased to one of three respondents (33%).
- The most popular reported attraction to visit the region continued to be outdoor activities, with 68% of respondents selecting this response.
- “Relaxing, dining and shopping” remained the second most expressed reason to visit the area by 49% of respondents. Sightseeing (43%) and visiting friends (27%) rounded out the top areas of interest and are consistent with past data.
- More than three out of four (76%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was a primary activity of interest.

Visitor profile

Hamilton County

- The average daily traveler party spending in 2024 dropped substantially to \$314 (from \$429 in 2023) after two years of “double digit” growth. The total estimated average trip expenditure for 2024 visitors is \$1,444, a drop from the prior year of \$1,590, but still higher than any other year in this research since before 2023 and above the five-year average.
- Reported spending on lodging increased slightly from the prior year, to \$819 from \$797.
- All other specific spending categories showed declines from the prior year, including a modest drop in average meal and transportation expenditures, but marked drops in shopping, entertainment, attractions and events. “Other” expenditures remained flat. These declines appear to show visitor spending restraint in 2024 in areas of the most flexibility in travel spending.

Day Tripper Visitor Profile



Visitor profile

Day trippers

- Daytrip respondents comprised approximately 17.6% of the survey respondents. This is a more than 2% increase from the prior year's data, but close to that reported in 2021 and 2022 (17% and 16% respectively).
- The average day trip visitor party size is 2.6 people, including 2.2 adults and 0.4 child. This has declined slightly in each of the past two years.
- Day-trip visitors (with a mean of 59 years old) continue to be a slightly higher average age compared to all other visitor groups.
- Overall visit expenditures continue to be lower among day-trip visitors. The total average reported party expenditure for day travel is \$328 compared to \$435 daily expenditure by all visitors. The reported daily visitor spending level remained the same from the prior year. This follows a substantial increase in spending by day visitors reported in 2023 (increased by 25% from the prior year).

Visitor profile

Day trippers

- Shopping was the highest reported expenditure category at \$84, increasing almost 10% from the prior year. Entertainment and meals (both at \$83) are the next highest reported expenditure categories. Reported spending on meals declined somewhat from the prior year (\$89), while reported spending on entertainment increased substantially (from \$73).
- Outdoor activities (47%) are the strongest reported draws to visit the region by day trippers, followed by sightseeing and relaxing (44%), and shopping and dining (41%). These areas of interest have stayed consistent over the years.
- Among day visitors who responded that they were interested in outdoor activities, the interest in hiking was by far the most popular, selected by 77% of respondents.

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 55 years (versus 58).
- The average short-term renter visitor party size is substantially larger at 4.6 people (3.5 adults and 1.1 children) versus 3.2 for all visitors to the region. This is higher than the figure of 4.1 persons last year, but nearer to the short-term renter average size from 2021-2023.
- Total expenditures reported among short-term renters were an average of \$2,783, just below last year's average of \$2,815. This is well above the average regional visitor-reported expenditure of \$1,769 per trip. The total expenditure reported by this group, however, has declined over the last three years.
- Lodging costs accounted for most of this reported expenditure at \$1,458. This is just higher than the prior year (\$1,420).

Visitor profile

Short-term renters

- Reported average meal costs were \$442, just lower than reported in 2023 (\$451). Reported shopping expenditures by visitors staying in short term rentals increased somewhat from the year prior (from \$308 to \$341).
- Reported spending on attractions/events and entertainment declined somewhat from the prior year. All average expenditure categories reported by short-term renters are higher, by a wide margin, than averages reported by all regional visitors.
- The reported average length of stay for short-term renters is 4.8 nights, higher than reported in the prior year (4.5 nights) and longer than all regional visitors (4.1 nights).
- Outdoor activities (at 74%) and relaxing/dining (at 57%) were substantially higher reported levels of interest than among all regional respondents. Sightseeing was the next most reported interest (at 42%).

Regional Visitor Impacts



Regional visitor impacts

All travelers

- The average traveler party age of respondents was 58 years old, consistent with the five-year average.
- The average reported total traveler party size was 2.6 adults and 0.6 children, for a total of 3.2 people. These are the same figures as tabulated from the year prior and consistent throughout the last several years.
- Just over two-thirds (67%) of respondents reported being New York state residents, down from 70% last year.
- Visitors traveling from the capital district and northern New York comprised the largest group of these New York state respondents (55%), followed by central New York (17%), and a roughly equal portion hailing from downstate/New York metro-Long Island and western New York (14% each). A greater proportion of visitors from western and downstate New York than in the prior year were reported.

Regional visitor impacts

All travelers

- The proportion of visitors from Northeastern states outside of New York state were consistent from the last several years (19% of respondents). Only 5% of visitors reported visiting from states outside the Northeast or Canada (with the highest proportion, 3%, from southern U.S. states)
- Canadian visitation climbed slightly from the prior year with 4% of visitors reporting from Quebec and 3% from Ontario. This was an increase by 1% in each province from the prior year.
- The average stay length reported by 2024 travelers rose to 4.1 nights. The last several years had ranged between 3.5 and 3.6-night average stays.
- Hotels/motels remained the most frequently reported lodging choice among 2024 traveler respondents (40%). This was down slightly from the prior year (42%).

Regional visitor impacts

All travelers

- Reported stays in short-term rental lodging (17% of respondents), staying with family and friends (15%), and staying in second homes (11%) all remained consistent from the prior year. Respondents indicated a small increase in those camping visits (15% in 2024 vs. 12% in 2023).
- The highest-ranking attraction to visit the region continued to be outdoor activities, with 64% 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 52% of respondents. Sightseeing (40%) and visiting friends (25%) rounded out the top four areas of interest to visit. These figures are consistent with recent years of data.
- One out of four respondents (25%) reported visiting family and friends as a draw to visitation, consistent with long-term data.

Regional visitor impacts

All travelers

- Sixteen percent (16%) of respondents reported visiting Olympic sites and events as an attraction, consistent with the prior year data. Reported interest in events (13%) remained higher across the most recent few years.
- More than three out of four (76%) 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 (31%), followed by fishing (17%), boating (14%) and birding (14%). Interest in birding has remained at this higher than historic level for the past 5 years.
- For the second year in this research, 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, 43% expressed interest in live music and 24% expressed interest in art galleries.

Regional visitor impacts

All travelers

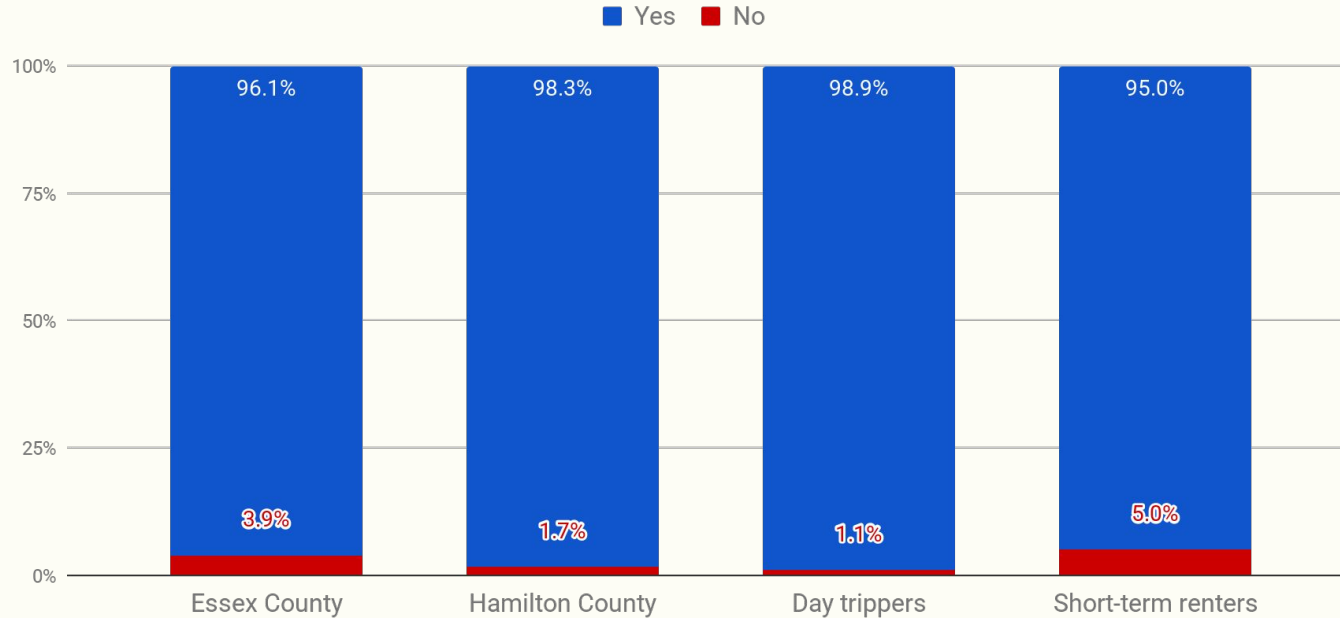
- Expenditure levels reported by 2024 visitors remained near to the highest levels reported within this research history. The average daily traveler party spending in 2024 was estimated at \$435.
- The total estimated reported trip expenditure was \$1,769, just slightly above the total reported in the prior year (\$1,768).
- Reported spending on lodging (\$899) climbed slightly (from \$868 reported by 2023 visitors) but showed more moderate growth than seen in the prior 3 years.
- Reported meal spending (\$303) was nearly consistent with recent years.
- Other expenditure categories (shopping, entertainment, events, transportation) declined somewhat from prior years, indicating some consumer restraint among these categories that had previously grown steadily post-pandemic. The “other” category increased in reported spending from the prior year (at \$79 total).

Regional Visitor Sentiment



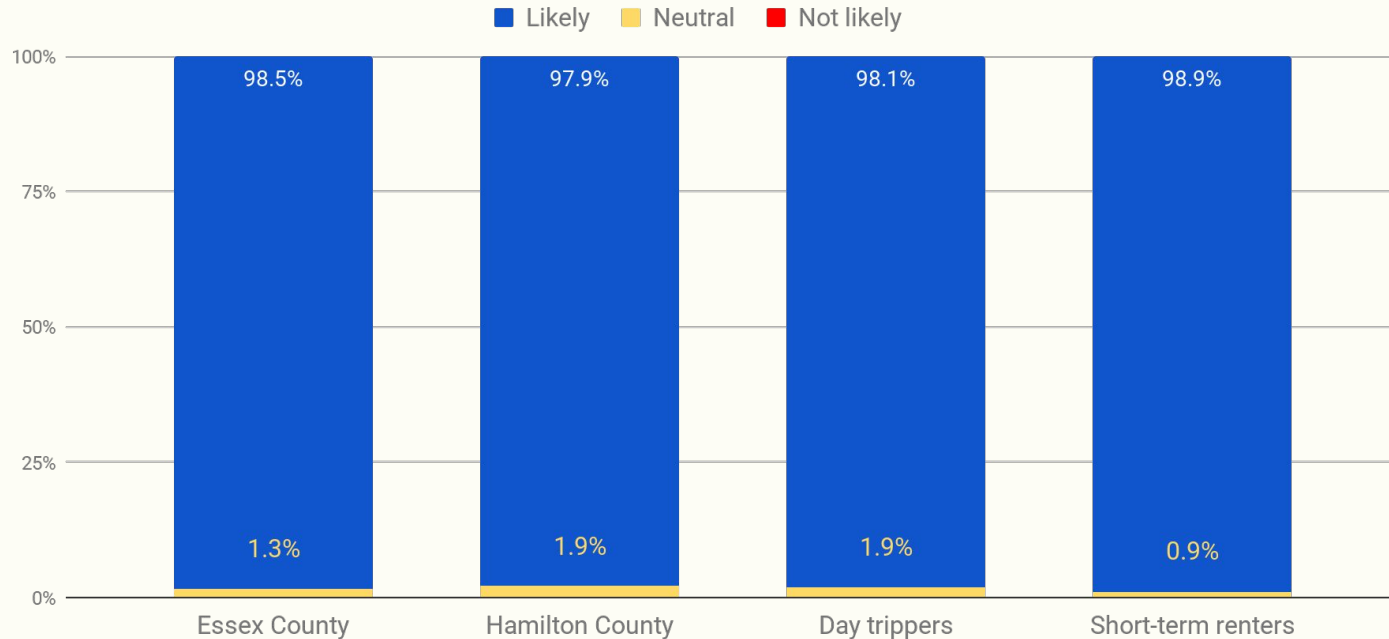
Regional visitor sentiment

Did the trip meet your budget and cost expectations?



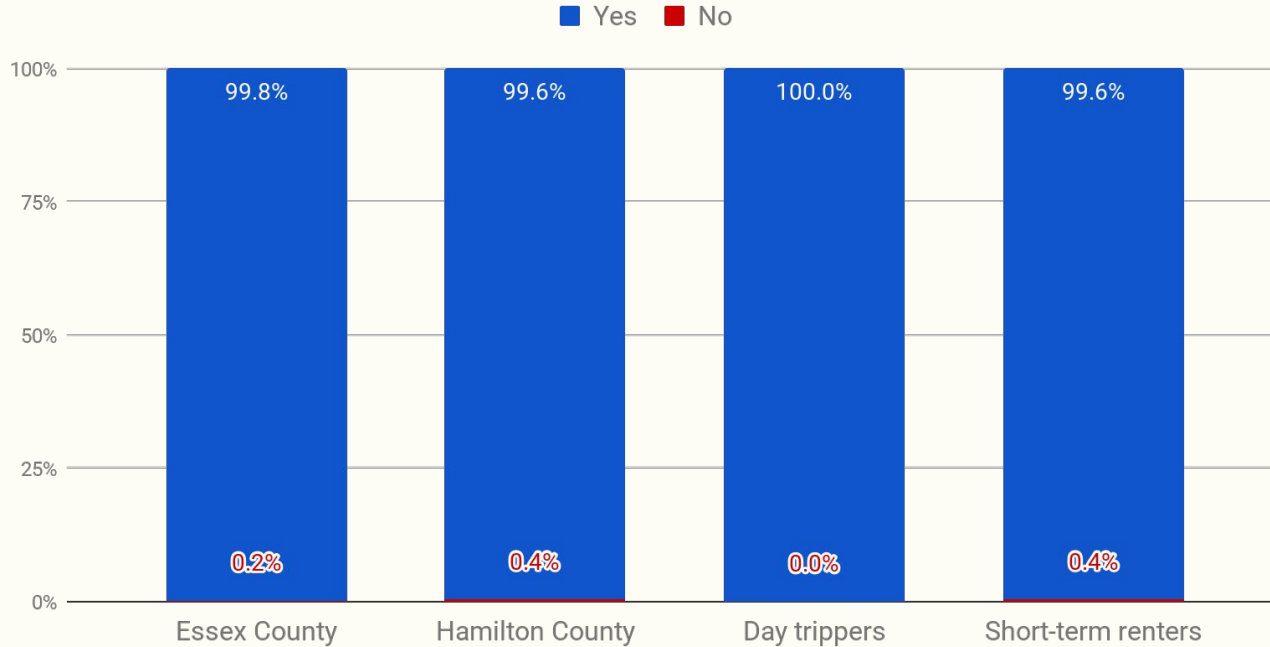
Regional visitor sentiment

How likely are you to recommend the Adirondacks to a friend or family member?



Regional visitor sentiment

Would you plan another visit to the Adirondacks?



Regional ROI Study

The background of the slide is a scenic landscape photograph. It features a large body of water, likely a lake or a wide river, in the middle ground. The water is a deep blue-grey color. In the foreground, there are rolling hills covered in dense forest. The trees in the immediate foreground show vibrant autumn colors, including shades of red, orange, and yellow. The hills in the background are more distant and appear in various shades of blue and green, suggesting a misty or hazy atmosphere. The sky is filled with soft, white clouds, and the overall lighting is bright, suggesting a clear day.

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:

$$\begin{aligned} &215,140 \text{ (direct leads)} \\ &\times 82\% \text{ (gross conversion factor)} \\ &\times \$435 \text{ (mean traveler party expenditure per day)} \\ &\times 4.1 \text{ (mean length of stay in nights)} \end{aligned}$$

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2024 is **\$314,635,796.**

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:

$$\begin{array}{l} \$314,635,796 \text{ (total estimated traveler revenue)} \\ \div \$3,760,887 \text{ (total ROOST marketing expenditures)} \end{array}$$

This produces a conservatively-estimated ROI of 84:1 in leisure traveler-related revenue for every marketing dollar expended.