

2024 Visitor Study and Marketing Analysis

ADIRONDACK REGION

*Essex County, Hamilton County, Saranac Lake and
Tupper Lake, NY*



ROOST

Prepared by: PlaceMaking
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BACKGROUND

In 2024, the Regional Office of Sustainable Tourism (ROOST) continued to manage the marketing tourism assets for Essex County, Hamilton County, the Saranac Lake region, and the Tupper Lake region. ROOST commissioned a study to determine visitor information at the county levels and to gauge key regional marketing program statistics. This year's study is the 21st year of ROOST and its partners completing this visitor research.

ROOST contracted with PlaceMaking, a regional community and economic development firm, to complete this research. ROOST sent a jointly created survey tool to a sample of its 2024 leisure travelers to the region. Visitors were requested to complete an online survey (via email) and the results were compiled from the responses received specifically from visitors who spent most of their time in this portion of the Adirondack region.

Results from 2024 visitation survey analysis rounded out several years of post-pandemic visitor data that is largely consistent across this time. Regional visitor data and a summary marketing/return on investment (ROI) analysis are provided in this briefing. These data exclude group and business market segments.

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 215,140 traceable leads who expressed interest in visiting the region in 2024.

PlaceMaking also compiled similar research for Essex and Hamilton counties individually; these reports are available under separate covers. Accompanying research has also been provided for a more in-depth look at day visitors and those who stayed in short-term rentals during their visit, and a deeper look into the tourism and sustainability interests of visitors.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the 13th year. The study has employed a similar methodology with comparable results for more than 20 years. The survey was designed collaboratively by PlaceMaking and ROOST to gather information from its leisure visitors and to measure regionally the return on investment in marketing expenditures.

Survey results are parsed by where the visitor indicated spending the most time to achieve individual county-level data; these results are analyzed by these sub-groups as the basis for the reporting. It is acknowledged that this is not an exact measure, but the researchers believe that this provides reasonable results as the methodology has shown credibility and reliability across multiple applications over time.

The survey was distributed electronically by ROOST to a sampling of its database of visitors or parties inquiring about visitation to the Adirondack region during 2024. Surveys were collected quarterly throughout 2024. Within the month following each quarter, the survey was delivered electronically to a sample of visitors who had inquired about traveling during that period. This method of collection allows surveys to be modified slightly by seasonal activities and to maximize trip data recollection soon following actual dates of travel.

Those invited to participate in the survey represent traceable direct inquiries generated by ROOST's marketing team. This includes respondents who requested travel information through the agency's websites, through social media outlets (Twitter, Facebook, YouTube and Instagram), digital information forms, telephone, printed materials, and in-person inquiries. Potential visitors provide their contact information in order to be identified (and tracked) as unique respondents. This study does not take into consideration the potentially large group of individuals who view travel materials via websites, etc., and are subsequently influenced to travel to the area, but do not provide traceable information to ROOST.

The survey was predicated on national and regional research with similar purposes and refined based on the experience of tourism professionals and validity checks over the two decades that it has been conducted. The online survey was attractively designed and provided Adirondack-related incentives to randomly selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a relatively higher survey return rate without skewing data.

Approximately 215,000 invitations were sent by ROOST for the regional survey. Just under 15,000 complete responses were received and then tabulated for valid responses. This results in an approximately 7% response rate. This is slightly lower than average across the years, however, researchers are satisfied with this response. Results appear consistent in comparison to many years of data collection and external data review.

The project team for this research is the same as previous years of the study, including project manager Victoria Zinser Duley-AICP, CEcD, Principal with

PlaceMaking and John Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management. Data management is carried out by PlaceMaking contractual assistance.

SUMMARY VISITOR DATA

Highlights of 2024 visits to the region included:

Demographics and Visit Information

- Over 215,000 individuals contacted ROOST via its various outlets for travel information about the region in 2024. This is slightly lower than 2023 near-record levels but on par with the five-year average.
- The average traveler party age of respondents was 58 years old, consistent with the five-year average.
- Median reported household income was \$108,000 which is higher than reported from 2023 (\$101,000).
- 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.
- Respondents included 57.1% females, 42.6% male, and 0.4% non-binary or other gender response.
- Visitors continue to report predominantly homogenous race/ethnicity, with 94.1% being White. Other races/ethnicities continue consistently with approximately 1% each reporting as Native American, Asian, and Hispanic. Just over 2% report mixed race and 0.6% percent report African American/Black.
- 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.

- 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 of these -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.
- Peak summer visitation during July and August (28%) was the most reported season of visit, followed closely by the “foliage season” of September and October (25%). Early summer (May/June at 16%) was the next most reported time for visitation. Ten to eleven percent of visits reported were during each of the remaining winter and shoulder season months (November/December, January/February, March/April). The only substantial change here is a drop from winter visitation levels from the year prior (from 16% to 11%).
- Hotels/motels remained the most frequently reported lodging choice among 2024 traveler respondents (40%). This was down slightly from the prior year (42%).
- 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).

Interests

- 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.
- 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%) 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.
- Ten percent (10%) of respondents indicated interest in cross-country skiing/snowshoeing and “other” outdoor activities.
- A question regarding hiking preferences continues to indicate a five-year trend of strong preference in casual hiking, with 80% of respondents indicating interest in day hikes (up from 69% in 2023), 30% leisure and hard surface hiking, and 23% family hikes.
- 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. Approximately 10% of respondents expressed interest in live theater and art studios. Sixteen percent of respondents indicated interest in various “other” arts/entertainment categories.

Traveler Spending and Conversion

- 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. This is slightly lower than daily reported expenditure in 2023, however, the average reported stay length increased. 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).
- 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 82%, equivalent to the five-year average of 82%.

Table 1 below depicts this year’s reported average expenditure by category and total.

Table 1. 2024 Average Visitor Expenditure Profile

| Expense Category | Expenditure |
|--------------------------|--------------------|
| Lodging | \$899 |
| Meals | \$303 |
| Shopping | \$205 |
| Entertainment | \$89 |
| Attractions/Events | \$84 |
| Transportation | \$110 |
| Other | \$79 |
| <i>Total Daily</i> | \$435 |
| <i>Total Trip</i> | \$1,769 |

ESTIMATED VISITORS

The 2024 estimated visitor count (as influenced by ROOST) is tabulated by multiplying the number of *traceable* leads generated by the agency (those who contacted their office during 2024 for information through all sources) by the conversion factor and by the average party size (determined by the survey).

215,140 (direct leads) x 82% (gross conversion factor) x 3.2 (average party size)

Estimated visitors in 2024= 564,527

The number of travelers influenced by ROOST to visit the region in 2024 is estimated at nearly 565,000.

Return on investment

Researchers measured return on investment (ROI) by estimating expenditures generated by direct expenditures of travelers and divided that by the total marketing dollars spent by ROOST.

The first step in this process is to estimate the total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials. This is done by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures, and length of stay:

215,140 (number of direct, traceable inquiries) x 82% (gross conversion factor)

x \$435 (mean traveler party expenditure per day) x 4.1 (mean length of stay in nights)

= \$314,635,796

(total estimated revenue generated by travelers influenced by ROOST in 2024)

The second step in this process is to divide the total revenue generated by travelers by the marketing dollars spent by the total ROOST marketing budget:

\$314,635,796 (total estimated traveler revenue) / \$3,760,887 (total ROOST marketing expenditures)

Return on Investment (ROI) = 84:1

The above calculations show that the total estimated revenue generated by travelers influenced by ROOST was nearly \$315 million in 2024. This produces a conservatively-estimated ROI of \$84 in leisure traveler-related revenue for every marketing dollar expended.

While this is lower than the record high ROIs estimated in 2022 and 2023, it is above the 5-year average (83:1) and shows an impressive return. This return includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending. It also does not include visitors who are influenced by ROOST marketing materials but do not provide traceable information to the office by inquiry.

CONCLUSIONS

ROOST continues to lead destination marketing by growing its assets, investing in authentic and unique recreational and event opportunities, and maximizing visitor expenditures.

Companion data for the survey provides additional insight into visitation trends. Smith Travel Research (STR)¹ is an international leader in producing lodging data. Some of the areas of measure are RevPAR (revenue per available room), which is a factor of both occupancy percentage and the average daily room rate. STR also measures the supply and demand of rooms available in the market.

The RevPAR measure showed a slight decline in 2024 for the region. The decline in RevPar is most likely a result of a 7% increase in total room supply and aggregate market demand rising at 4.6%, resulting in a 2.5% drop in occupancy and only a moderate increase in ADR of only 2%. This inverse relationship between these metrics is likely to contribute to the recent flat lodging expenditure level.

For the second year consecutively, average occupancy rates in the region declined slightly. The average lodging expenditures reported in this survey stayed relatively flat after decreasing from the prior year. While these data points show some challenges faced by the region, it is noted that prior to 2023 there were two years of extreme increases as travel hit a high demand post-pandemic.

Most expenditure categories (ie, lodging) stayed flat and most other areas (meals, shopping, entertainment, events) declined somewhat after several years of steep increases. The length of reported stay grew slightly which mitigates the lower average daily reported spending. It appears that many visitors showed some fiscal restraint in 2024 in areas of spending with greater choice and flexibility. The economy is in its

third inflationary year and the pent-up travel demand (and accrued travel budgets) from the pandemic may have run their course.

IPX 1031² (a financial advisory company) reported a continued strong interest in domestic travel for 2024/2025, with documented development of budgetary constraints. This report noted that in early 2024, half of Americans surveyed expected to travel more in 2024 than in 2023. However, more planned to budget more carefully for travel, to delay trips due to costs, or to use discounts such as travel perks (for free or reduced rooms or transportation) to reduce costs.

The Hilton corporation released a travel trend research study in 2024³ that documented expected travel developments. This research also predicted strong 2024/2025 travel from all generational groups (Baby Boomer, Gen X, Millennial, and Gen Z). The study noted the importance of wellness, technological connectivity, and personalization as important traits attractive to many of these travelers. It also emphasized the importance of cultural and connective experiences, such as authentic dining, to visitors in 2024 and beyond. This speaks favorably to the tourism assets the region has to offer.

Outdoor experiences were seen as continuing to be important to a majority of travelers. The growth of birding, which has grown steadily over the last decade, provides an example of an area of somewhat unique opportunity across the Adirondacks.

ROOST has well positioned its marketing to address the Adirondack region's travel opportunities. The estimated visitor base impacted by marketing materials is somewhat lower than in 2023, however, that year presented a record high during the 20+ years of research. The year's return on investment (ROI) from marketing expenditures is 84:1, above the five-year average. These figures show growth in reaching visitors and continued highly positive revenue impacts.

An opportunity to grow visitation, which has been recognized by ROOST, is to reach the Northeast's expanding diverse audiences. The region has invested in making its communities more welcoming to racially or ethnically diverse visitors. The region holds a Winter Pride festival that celebrates LGBTQ+ residents and visitors and has had growing participation. Further targeted marketing to other diverse audiences could provide real potential for growth, especially in a time of increasing personal budget constraints.

ROOST and the research team continue to discuss the broader impact of regional tourism on Adirondack regional visitor assets and areas by which to expand traveler data collection accordingly. The study at a regional level provides a benchmark in measuring ROI on marketing investments for the two-county region and the Villages of Tupper Lake and Saranac Lake in Franklin County. It enhances and improves evaluation of future marketing efforts, opportunities, and marketing channels for 2025 visitors and beyond. Five-year key statistics data are attached in Table 2.

TABLE 2. 5-YEAR SUMMARY TABLE OF KEY REGIONAL ROI DATA

| | 5-Year Average* | 2024 | 2023 | 2022 | 2021 | 2020 |
|--|------------------------|-------------|-------------|-------------|-------------|-------------|
| Number of Completed Survey Responses for this Adk Region | 5,392 | 4,195 | 9,717 | 3,293 | 6,161 | 3,593 |
| Median Income of Respondents | \$103,400 | \$108,000 | \$101,000 | \$105,000 | \$103,000 | \$100,000 |
| Mean Age of Respondents | 57 | 58 | 58 | 58 | 58 | 53 |
| Direct Inquiries to ROOST for Region | 207,885 | 215,140 | 228,324 | 215,944 | 211,930 | 168,089 |
| Average Night Stays/Party | 4 Nights | 4.1 Nights | 3.6 Nights | 3.7 Nights | 3.4 Nights | 5 Nights |
| Average Party Size | 3.7 Persons | 3.2 Persons | 3.2 Persons | 3.4 Persons | 3.7 Persons | 5 Persons |
| Conversion Factor Rate | 82% | 82% | 85% | 82% | 80% | 80% |

| | | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| Average Daily Expenditure per Party | \$426 | \$435 | \$491 | \$459 | \$421 | \$323 |
| Average Total Expenditure per Party per Trip | \$1,658 | \$1,769 | \$1,768 | \$1,697 | \$1,390 | \$1,667 |
| Marketing Budget | \$3,415,683 | \$3,760,887 | \$3,630,220 | \$3,188,710 | \$3,232,178 | \$3,266,422 |
| ROI | 83:1 | 84:1 | 91:1 | 94:1 | 75:1 | 70:1 |
| *2020 and 2021 data include only median income, making the "average" of these five years an approximation | | | | | | |

SOURCES CITED

1. Smith Travel Research, Inc. - "Trend Report Essex and Hamilton Counties NY". 2025.
2. IPX 1031. "Travel Report- American's Top Travel Trends in 2024". January 2025.
3. Hilton, Inc. "Trends Report- What Millennials, Gen Z, Gen X and Baby Boomers Tell Us About the Year Ahead". December 2024.