

Day Trip Visitors and Short-Term Renters to the Adirondack Region of Essex and Hamilton Counties:

Summary Report



ROOST

Compiled by-PlaceMaking-

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BACKGROUND and METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) managed the marketing tourism assets for Essex and Hamilton Counties and the Tupper Lake and Saranac Lake Regions in New York in 2024. The agency commissioned a study to determine leisure visitor information and to gauge key regional marketing program statistics. ROOST contracted with PlaceMaking, a regional community/economic development research firm, to complete this research.

ROOST sent a jointly created survey tool to a sample of its 2024 leisure travelers to the region. The agency requested visitors to complete an online survey (via email) and the results were compiled from the responses received specifically from those who visited the region. The survey was sent out at the end of each quarter of 2024 and results aggregated for the year.

The number of potential visitors who inquired about travel to the region this year, and provided contact information (traceable leads), was 215,000. Traceable leads do not include the larger audience that could also be influenced by promotional material for the region without providing traceable contact information. This suggests that the leads represent a conservative number on which to base study results. Over 15,000 visitors responded to the survey that they had visited the region in 2024, providing a viable roughly 7% response rate of the full data pool.

Survey and project methodology, broader regional traveler data, and marketing/return on investment (ROI) analysis for the full visitor group are outlined in a separate report. One component of this research is a cross-tabulation of two subgroups of visitors from the survey response; this subset captures day-trip travelers and short-term renters (those who rented private homes for their visit). An analysis of the subgroups of day-only visitors and short-term renters follows in this report.

DAY TRIP VISITORS

Day trip visitors are those who responded in the full survey that they traveled to the area for one day only, staying zero overnights. A total of 704 such responses from 2024 trips were received, representing 17.6% of total responses. 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 survey included several new questions to gauge the overall satisfaction of 2024 day trip visitors to the region. The results were overwhelmingly positive. This included 98% of respondents indicating that they would be “likely” to recommend a visit to the region (with 0% not likely and 2% neutral) and a full 100% of respondents indicating that they would like to return in the future. Visitors were asked if the trip met their budget expectations and 99% stated that it did, with 1% stating that it did not.

The following summarizes variations of 2024 day trip visitor data from the overall regional visitor population:

- Day-trip visitors (with a mean of 59 years old) continue to be a slightly higher average age compared to all other visitor groups.
- The mean reported income of day visitors is \$92,000, notably lower than the \$108,000 reported income of all regional visitors.
- A higher proportion of day-trip visitors reported visiting in peak fall months of September/October (33%) and in March/April and May/June (13% each), than reported among all regional visitors. Day visitors report lower visitation rates (20%) in the typically peak summer months of July/August.
- The average day trip visitor party size is 2.6 people, including 2.2 adults and 0.4 children. This has declined very slightly for both of the last two years’ data collection. Day visitors have a smaller average party size than the full regional respondent pool (at 2.6 adults and 0.6 children).
- Overall visit expenditures, not surprisingly, 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).
- 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 closely by sightseeing (44%) and relaxing, shopping and dining (41%). These areas of interest have stayed consistent over the years in order but are also substantially lower than the rate of interest expressed by all regional visitors.

- Interest in visiting family and friends increased to 14% (from 11% in the previous year). Ten percent (10%) of respondents expressed interest in visiting events and 9% for agritourism. The level of agritourism interest has risen slowly over the past five years and is higher among day visitors than the full respondent group.
- 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.
- Other outdoor activity categories are selected much less frequently by respondents. Interest in canoeing/kayaking was selected by 15% of respondents, fishing by 10% of respondents, birding by 10% of respondents, and cycling and skiing/boarding by 7% of respondents.

SHORT-TERM RENTALS

The visitor survey asked respondents who traveled to the region for overnight stays in 2024 about their primary lodging choice. This section is devoted to the results of those visitors who indicated that they stayed in a privately rented home (through Airbnb, VRBO, Vacasa, AdkByOwner, etc.), referred to here as a “short-term rental”. Five hundred ninety-three (593) respondents indicated that they stayed in a short-term rental. This is a lower response from the prior year (656) and from prior years.

The survey included several new questions to gauge the overall satisfaction of 2024 visitors to Essex County. The results were overwhelmingly positive. This included 98.9% of respondents indicating that they would be “likely” to recommend a visit to the region and 99.6% of respondents indicating that they would like to return in the future. Visitors were asked if the trip met their budget expectations and 95% stated that it did, with 5% stating that it did not.

The following is a summary of visitors who stayed in short-term rentals in comparison to overall regional visitor respondents.

- The mean age of short-term renters is slightly younger than the full regional respondent group at 55 years (versus 58).
- The average mean income reported by short-term rental-staying visitors is \$115,000, notably higher than the \$108,000 reported by the regional visitor group.
- 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 markedly higher than the figure of 4.1 persons from the prior 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 the prior year reported at \$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). Reported average meals were \$442, just lower than reported in the prior year (\$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).
- Visitation among those staying in short term rentals is generally consistent by month/season to all regional visitor respondents.
- 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%), however similar in

rate of the full group.

- Visiting friends and family was reported as an interest by 20% of these respondents; lower than the full respondent group (24%). Interest in visiting Olympic sites (19%) is higher among short-term renter visitors than the full regional group (16%).
- Hiking (selected by 80%) and canoeing/kayaking (selected by 30%) are the most reported outdoor attractions by short-term renters. These figures represent slightly higher proportions than expressed among the full regional group. Fishing (18%) and cross-country skiing/snowshoeing (15%) are the next most common outdoor attractions expressed by short-term renters.

CONCLUSIONS

The survey data was cross tabulated for the purpose of analyzing two subgroups of visitor data. Day-trip visitors are a large piece of the visiting fabric of the region and provide substantial economic impact, particularly with assumed proximity to visit and ability to return more frequently.

The proportion of day-trip visitors appears to have declined since pre- and pandemic travel. Day-trip visitors, on average, comprise smaller groups and spend less in all expenditure categories, even daily, than all visitors aggregated. This group, on average, is slightly older and reports a lower median income level than among all other regional visitors.

Day-trip visitors' economic impacts are constrained by the brief time spent in the area and their spending patterns, which are both substantiated by this research. The reported increase in shopping and entertainment expenditures among day visitors is interesting and worth reviewing in subsequent years. Following two successive years of reported expenditure increases by day visitors, however, it will be interesting to note if day visitors continue to grow their expenditure profile for their brief stays in the region.

Short-term renters represent a sizable and strong market within the region and nationwide. National data confirms that short-term rentals rebounded faster than hotels as the world moved out of the pandemic. However, over the last two years it appears that the extremely rapid growth among these accommodation types may have moderated.

The average reported party size and length of stay among short-term renters rose from the prior year. The reported party size and length of stay remains higher than the overall visitors.

Total reported visitor spending by short term rental-staying visitors declined for the second year. While reported levels of lodging and shopping increased from the prior year, expenditure on meals dropped slightly. It may indicate a different visitation pattern for some or many of this group in smaller properties and/or preparing meals instead of dining out and limiting some entertainment activities. The flattening of average pricing for short-term rentals indicates possible market saturation and impacts of greater regulation across this market.

The “conversion rate” or measure of effectiveness of marketing materials is higher among this group (85% who note a positive influence of materials on their travel decisions vs. 82% of all regional respondents).

The data gathered from this survey shows continued highly positive indications from the short-term renter group and overall continued high expenditure levels across all categories. While regulation and assimilation of short-term rentals presents continued challenges to the community, a higher level of economic impact of visitors who choose this lodging type presents positive considerations.

The popularity of short-term rentals continues to grow across the region, especially in more remote locations. Their location and presence provide both opportunities with expanding visitor markets and economic impact; however, these facilities often strain the community infrastructure.

With intensive workforce challenges across the region, in hospitality and all industries, the growth of short-term rentals over the last decade has exacerbated housing shortages. ROOST was a regional leader in establishing occupancy tax collection many years ago and continues to advocate for solutions that will benefit the region and enrich its tourism assets.

ROOST similarly has engaged stakeholders and resources to work toward improving the workforce housing supply. The agency and its partners will continue to use collected data to work to improve solutions to the challenges and opportunities for short-term rentals.