
VISITOR STUDY AND MARKETING ANALYSIS

2024 VISITOR PROFILE

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)

ROOST



Photo credit: Lakeplacid.com (ROOST)

PlaceMaking

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INTRODUCTION

In 2024, the Regional Office of Sustainable Tourism (ROOST) continued to manage the marketing tourism assets for Essex County, New York. The agency 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 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 report. 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 195,018 traceable leads who were interested in visiting Essex County in 2024.

PlaceMaking also compiled similar research for Hamilton County and the Tupper Lake and Saranac Lake Regions. 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 for sustainability interest and preferences, under separate covers.

METHODOLOGY

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

Survey results are parsed by where the traveler indicated spending the most time to achieve individual county level data; these results are analyzed by these sub-groups as the basis for this report. 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 travel 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 help 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 efforts. 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 that the potentially large group of individuals who view travel materials via websites, etc., 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 through 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 195,000 invitations were successfully sent by ROOST for the survey. Just under 14,000 complete responses were received and then tabulated for valid responses. The results are an approximately 8% response rate. 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 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.

VISITOR DATA SUMMARY

Highlights of 2024 visitation to Essex County from all survey respondents include:
Demographics and Visit Information

- The average visitor party age of respondents was 58 years old and respondents included 57.4% female, 42.2% male, and 0.4% gender non-binary/other.
- Visitor race/ethnicity remains consistent with prior years with 94.1% reporting as White, approximately 1% each reporting Native American and Asian/Pacific Islander and Hispanic, and nearly 2.5% reporting mixed race.
- Median income of visitor respondents is \$111,000, which is higher than last year reported at \$105,000.
- 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.
- Of New York state visitors, Northern New York and the Capital District continued to be the most frequently reported visitors from this group 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. This proportion has grown over the last 5 years.
- 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 (3.6 nights).
- The July/August and September/October visitation months were the most common seasons for visit by far, with 27% of respondents noting visits, respectively, during each of these peak months. It is notable that over half of the county's visitation, as represented by this visitor sample, travels during those four months of the year.
- Hotels/motels remained the most reported lodging choice among 2024 visitor respondents by a high margin (43%), compared to 41% in 2023
- Short-term rentals were reported as the second-most common lodging choice used by 17% of respondents. Respondents reporting staying with family and friends remained consistent at 15%. Reported camping/RV stays increased slightly to 12% while second home stays declined slightly to 10%. Respondents reporting stays at bed and breakfasts (3%) remained consistent from prior years.

Interests

- The most reported draw to visit the region continued to be outdoor activities, with 66% of respondents selecting this reason for interest in visiting the area.
- "Relaxing, dining and shopping" remained the second-most expressed reason to visit the area, selected by 53% of respondents. Sightseeing (42%) and visiting friends (22%) rounded out the top four areas of expressed interest. These dominating areas of interest have remained so across the duration of the research.
- Nineteen percent (19%) of respondents reported visiting Olympic sites as an attraction, a slight decline from the prior two years (21-23%). Fourteen percent (14%) indicated that events were an attraction to visit the region; this area of interest has remained higher during the last several years than in years prior.
- 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.

- Reported interest in canoeing or kayaking was the next most cited outdoor interest (26%), followed by fishing (14%), boating (12%), and cross-country skiing/snowshoeing (10%).
- Birding was noted as an attraction by 9% of outdoor activity respondents.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 79% of respondents indicating interest in day hikes, 31% in leisure and hard surface hiking, and 20% in family hikes. Indicated interest in

Forty-sixer level hikes stayed strong among Essex County visitors at 26%. These figures have remained consistent during the five years of data collection in this area.

- For the second year, 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, comprising 33% of responses, followed by visiting art galleries (23%), art studios (12%), live theater and “other” events (10% each).

Traveler Spending and Conversion

- The average daily traveler party spending in 2024 is estimated at \$459 per day. This is lower than the \$536 daily level from the prior year, 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. However, all other expenditure categories (except transportation) declined by at least 10% from the prior year. Transportation costs were reported at an equal level to the year prior.
- Conversion measurement, the percentage of travelers who stated that the information or marketing viewed either helped them decide to take an unplanned trip or reinforced potential plans to visit, was 82%. This is consistent with the conversion average for the past five years.

- ROOST received nearly 195,000 contacts through its marketing efforts for Essex County in 2024. This is slightly lower than the prior year, but still well above the five-year average.

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

Table 1. 2024 Average Visitor Expenditure Profile

Lodging	\$945
Meals	\$308
Shopping	\$199
Entertainment	\$96
Attraction/events	\$89
Transportation	\$112
Other	\$85
<i>Total Daily</i>	\$459
<i>Total Trip</i>	\$1,834

Visit Satisfaction Level

The survey included several new questions to gauge the overall satisfaction of 2024 visitors to Essex County. The results were overwhelmingly positive. This included 98.5% of respondents indicating that they would be "likely" to recommend a visit to the region and 99.8% of respondents indicating that they would like to return in the future.

Visitors were asked if the trip met their budget expectations and 96% stated that it did, with 4% stating that it did not.

RETURN ON INVESTMENT ANALYSIS

Return on investment (ROI) is measured by estimated expenditures directly generated by visitors and divided by the total marketing dollars spent by ROOST in Essex County.

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

*195,018 of direct, traceable inquiries) x 82% (gross conversion factor)
x \$459 (traveler party expenditure per day) x 4 (mean length of stay in
nights)*

*= \$293,603,499 (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 visitors by the marketing dollars spent on 2024 Essex County visitor marketing:

*\$293,603,499 (total estimated traveler revenue) / \$3,545,887 ROOST Essex County
marketing budget)*

Return on Investment (ROI) = 83:1

The above calculations show that the total estimated revenue generated directly by visitors touched by ROOST was nearly \$294 million. This produces a conservatively estimated ROI of \$83 in leisure traveler-related revenue for each marketing budget dollar expenditure. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would increase the ROI. It also does not include the visitors who do not provide traceable information after being positively influenced to visit after reviewing ROOST marketing materials.

CONCLUSION

ROOST continues to lead destination marketing by growing its destination 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.

Several years of strong inflation and a beginning-to-flagging consumer confidence may be the reason that visitors to the region (and across the nation) are choosing to show restraint in areas of spending. The economy has slowed, interest rates remain high, and the pent-up travel demand (and accrued travel budget) from the pandemic may have run their course. A positive note is the slightly longer stay reported by Essex County visitors on average.

IPX 1031² (a financial advisory company) reported the continued strong interest in domestic travel, with a newer 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 developments. This research also predicted strong 2024 travel from across 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 travelers. It also emphasized the importance of cultural and connective experiences, such as authentic dining, to visitors in 2024 and beyond.

Outdoor experiences continue to be reported as important to a majority of travelers. The growth of one activity, birding, which has grown steadily over the last decade-provides an example of an area of somewhat unique opportunity across the Adirondacks. Interest in events, cultural/heritage activities, agritourism, and arts and entertainment activities remain steady.

ROOST has well positioned its marketing to address Essex County's travel opportunities. Estimated visitor spending remains high. The estimated visitor base impacted by marketing materials is somewhat lower than in the prior year, however, that year (2023) represented a research-long high. The year's return on investment (ROI) from marketing expenditures is 83:1.

An opportunity to increase 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. ROOST is a leader in destination management through continually investing in visitors' experience and manners to measure such. This study is an important benchmark of these practices and management. Table 2 below summarizes key Essex County traveler data ascertained by this survey during the last five years of data collection.

**TABLE 2. KEY FACTS DERIVED FROM SURVEY DATA-
5-YEAR COMPARISON**

	5 Year Average	2024	2023	2022	2021	2020
Number of Completed Survey Responses (for area)	3,193	3,582	3,342	2,571	4,302	2,682
Median Income of Respondents	\$103,200	\$111,000	\$105,000	\$100,000	\$100,000	\$100,000
Mean Age of Respondents	57	58	57	58	58	53
Respondent Gender	58% Female 42% Male	57.4% Female 42.2% Male 0.4% other	58% Female 42% Male	62% Female 38% Male	58% Female 42% Male	58% Female 42% Male
Direct Inquiries to Essex County via ROOST	191,994	195,018	207,484	197,268	198,439	161,763
Average Night Stays/Party	4.3 Nights	4.0 Nights	3.6 Nights	3.7 Nights	3.3 Nights	6.7 Nights
Average Party Size	3.6 Persons	3.1 Persons	3.2 Persons	3.3 Persons	3.3 Persons	5 Persons
Conversion Factor Rate	82%	83%	82%	82%	80%	83%
Average Daily Expenditure per Party	\$451	\$459	\$536	\$512	\$464	\$283
Average Total Expenditure per Party per Trip	\$1,786	\$1,834	\$1,878	\$1,895	\$1,484	\$1,838
Marketing Budget	\$3,072,411	\$3,545,887	\$3,435,145	\$2,993,635	\$2,750,993	\$2,636,397
ROI	92:1	83:1	93:1	102:1	88:1	94:1

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 Millenials, Gen Z, Gen X and Baby Boomers Tell Us About the Year Ahead". December 2024.