

VISITOR STUDY:

2024 PROFILE

Hamilton County, New York

Regional Office of Sustainable Tourism (ROOST)

ROOST



Photo credit: ExperienceourADK.com (ROOST)

PlaceMaking
Growing North Country Communities and Economies

April 2025

INTRODUCTION

The Regional Office of Sustainable Tourism (ROOST) commissioned, for the eighth year, this study to measure traveler information and key marketing program statistics for Hamilton County New York. ROOST is responsible for marketing Hamilton County's tourism assets. The research targeted the leisure visitor market and excludes the group and business market segments.

ROOST contracted with PlaceMaking, a regional community and economic development research firm, to complete this study. ROOST sent a jointly created survey tool to a sample of its 2024 visitors to Hamilton County. 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 Hamilton County.

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. PlaceMaking also conducted similar research for neighboring Essex County and for the cumulative Hamilton and Essex County region. These results are available under separate covers.

METHODOLOGY

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

As ROOST represents the tourism marketing interest for numerous Adirondack communities, the survey of 2024 travelers also included adjacent Essex County. Traveler studies for the two-county region, as well as the Saranac Lake and Tupper Lake Regions, are provided under separate covers.

The research team parsed data by where the traveler indicated spending the most time to achieve individual county level results. While this is not an exact measure, the researchers believe that this provides reasonable results as the methodology is consistent per county and has shown reliability across multiple applications over time.

ROOST distributed the survey electronically to a sampling of its database of visitors inquiring about visitation to Hamilton County 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 allows surveys to be modified very slightly by seasonal activities and particularly to improve trip data recollection near to the actual dates of travel.

The visitors invited to participate in the survey represent traceable direct inquiries generated by the office's marketing efforts which resulted in individuals providing their contact information. This included respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter, Facebook, Instagram, and YouTube), website, printed materials, and in-person visits. This study does not take into consideration the potentially large group of individuals who view travel materials and are then subsequently influenced to travel to the area, but do not provide traceable information.

The survey instrument is predicated on national and regional research with a similar purpose and refined based on the experience of tourism professionals. The online survey was attractively designed and provided unique Adirondack-related incentives to randomly selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a higher survey return rate without skewing data.

Approximately 215,000 invitations were sent by ROOST for the regional survey. Nearly 15,000 responses were received. This results in an approximately 7% response rate. The researchers are satisfied with this response level.

The project team for this research is the same as previous years of study, including project manager Victoria Zinser Duley- AICP, Principal with PlaceMaking and John Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management.

VISITOR SURVEY SUMMARY

Highlights of 2024 visitation to the region from among all survey respondents included:

Demographics and Visit Information

- Average traveler party age of respondents was 61 years old, slightly older than reported in the prior year (59).
- Respondents included 55.1% female, 44.7% males, and 0.2% non-binary/other. Male respondents increased by several percentage points compared to the prior year (41%).
- The median income of respondents is \$103,600, just slightly higher than reported in the prior year (\$103,280).
- 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. This is slightly lower than the average reported party size from the prior two years.
- Visitation by respondents from within New York state stayed consistent with the last several years at 81% of respondents.
- Of New York state visitors, half (50%) reported coming from northern New York counties. Twenty-five percent (25%) reported from central New York state. Thirteen percent (13%) 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. Reported visitation from other U.S. regions was 4%, with 3% of these from the southern U.S. Less than 1% of respondents reported from Canada.
- 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.

- Well over half of visitors reported visiting the area during July/August (38%) or September/October (21%). One in five visitors (20%) reported visiting during early summer (May/June).
- Camping/RV continued to be the most reported lodging choice among visitors and increased to one of three respondents (33%).
- Second home use and short-term rentals were reported by 18% and 15% of respondents, respectively. A lower 13% of respondents reported staying with friends and family, substantially lower than in the prior year (17%).

Interests

- The most popular reported attraction to visit the region continued to be outdoor activities, with 68% of respondents selecting this response. This is generally consistent throughout the data collection period historically.
- “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 four areas of interest and are consistent with past data.
- Twelve percent (12%) reported interest in heritage sites and 9% in events, both staying higher as reported from 2023 visitors in comparison to years prior. Eight percent (8%) showed an interest in arts and entertainment.
- 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.
- Reported interest in canoeing or kayaking was the next most common reported outdoor interest (51%), followed by fishing (30%) and boating (22%). Each of these outdoor activities showed higher interest than reported in the prior years.
- Twelve percent (12%) of respondents expressed an interest in birding. Six percent (6%) of respondents indicated interest, each, in cross-country skiing/snowshoeing and hunting. Reported interest in hunting gained slightly percentage points from the prior year (4%).

- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 80% of respondents indicating interest in day hikes, 30% in leisure and hard surface hiking, and 23% in family hikes. These data have been consistent over the five years collected.
- A question was asked for the second year to those who responded that they were interested in arts and entertainment. These respondents were asked what types of arts activities were of interest. The most popular response was live music at 27%, “other” art activities at 17%, pottery at 10% and 9% each instruction or studio.

Traveler Spending and Conversion

- The average daily traveler party spending in 2024 dropped substantially to \$314 (from \$429 in 2023). 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.
- Conversion measurement, the percentage 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%, a small increase from the prior year (82% in 2023).

Table 1 below summarizes key Hamilton County traveler data ascertained by this survey during the last five years of data collection.

Table 1. 2024 Average Visitor Expenditure Profile

Expense Categories	Expenditures
Lodging	\$819
Meals	\$234
Shopping	\$135
Entertainment	\$53
Attractions/Events	\$58
Transportation	\$95
Other	\$50
<i>Total Daily</i>	\$314
<i>Total Trip</i>	\$1,444

Visitor Satisfaction

The survey included several new questions to gauge the overall satisfaction of 2024 visitors to Hamilton County. The results were overwhelmingly positive. This included 97.9% 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 98% stated that it did, with 2% stating that it did not.

CONCLUSION

ROOST continues to lead destination marketing by growing its assets, investing in authentic and unique recreational and event opportunities, and maximizing visitor expenditures. Smith Travel Research (STR)¹ is an international leader in producing lodging data. While detailed STR data is not available for Hamilton County, the information relating to the nearby regions may be of interest. Some of the areas of measure are RevPAR (revenue per available room) which is a factor in both occupancy percentage and the average daily room rate.

In neighboring Essex County, for instance, the RevPAR measure showed a slight decline in 2024. This is most likely a result of the 2.5% drop in occupancy and a comparatively small increase in ADR of only 2%. This inverse relationship change between these two 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. As a positive, the length of the 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.

Outdoor experiences were seen as continuing to be 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.

ROOST has well positioned its marketing to address this Adirondack region's travel opportunities. Estimated visitor spending remains high. 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 83:1 which is above the five-year

average. These figures show growth in reaching visitors and continued highly positive revenue impacts.

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. The study at a regional level provides a benchmark in measuring ROI on marketing investments for the two-county region as well as the Saranac Lake and Tupper Lake Regions. It enhances and improves evaluation of future marketing efforts, opportunities, and marketing channels for 2025 visitors and beyond. This could have a positive impact on future tourism growth in the region.

Table 2 below summarizes key Hamilton 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	1,005	630	896	724	1,859	915
Median Income of Respondents ¹	\$96,855	\$103,600	\$103,280	\$97,395	\$90,000	\$90,000
Mean Age of Respondents	59	61	59	59	59	55
Respondent Gender	59.2% Female 40.5% Male	55.1% Female 44.7% Male 0.2% other	59% Female 41% Male	62% Female 38% Male	61% Female 39% Male	59% Female 40% Male
Average Night Stays/Party	4.5 Nights	4.6 Nights	3.7 Nights	3.8 Nights	3.7 Nights	7 Nights
Average Party Size	3.9 Persons	3.4 Persons	3.5 Persons	3.6 Persons	3.8 Persons	5.2 Persons
Conversion Factor Rate	82%	83%	82%	83%	80%	81%
Average Daily Expenditure per Party	\$319	\$314	\$429	\$375	\$314	\$167
Average Total Expenditure per Party per Trip	\$1,357	\$1,444	\$1,590	\$1,425	\$1,162	\$1,167

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.