

# Sustainability Survey Analysis - April 2025

Prepared for ROOST by PlaceMaking

## Background/Methodology

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The Regional Office of Sustainable Tourism (ROOST) has long worked toward the sustainability of its tourism assets in Essex and Hamilton counties and the Saranac Lake and Tupper Lake Regions in New York state. The agency commissioned a study to determine visitor information at the county levels and to gauge key regional marketing program statistics.

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.

For the third consecutive year, ROOST employed an additional brief survey to sample those who requested information about travel to the region and then indicated that they traveled to the region in 2024, to ascertain opinions and perceptions about sustainability relative to their travel decisions. The survey asked these 2024 visitors to indicate the level of importance of sustainability concerns to their travel decisions. Those who responded that it was a “strong concern” or “somewhat of a concern” were directed to an ancillary study. The results of that survey are outlined below.

Nearly 1,000 “more sustainability minded” respondents responded to these questions. This is down from the nearly 1,500 who replied to this question from 2023 travel, however the complete respondent pool had declined somewhat as well.

Just over half (54%) of these “more sustainability minded” respondents report residing in New York state, compared to 67% from the full survey. Twelve percent (12%) of these respondents reported Canadian residence.

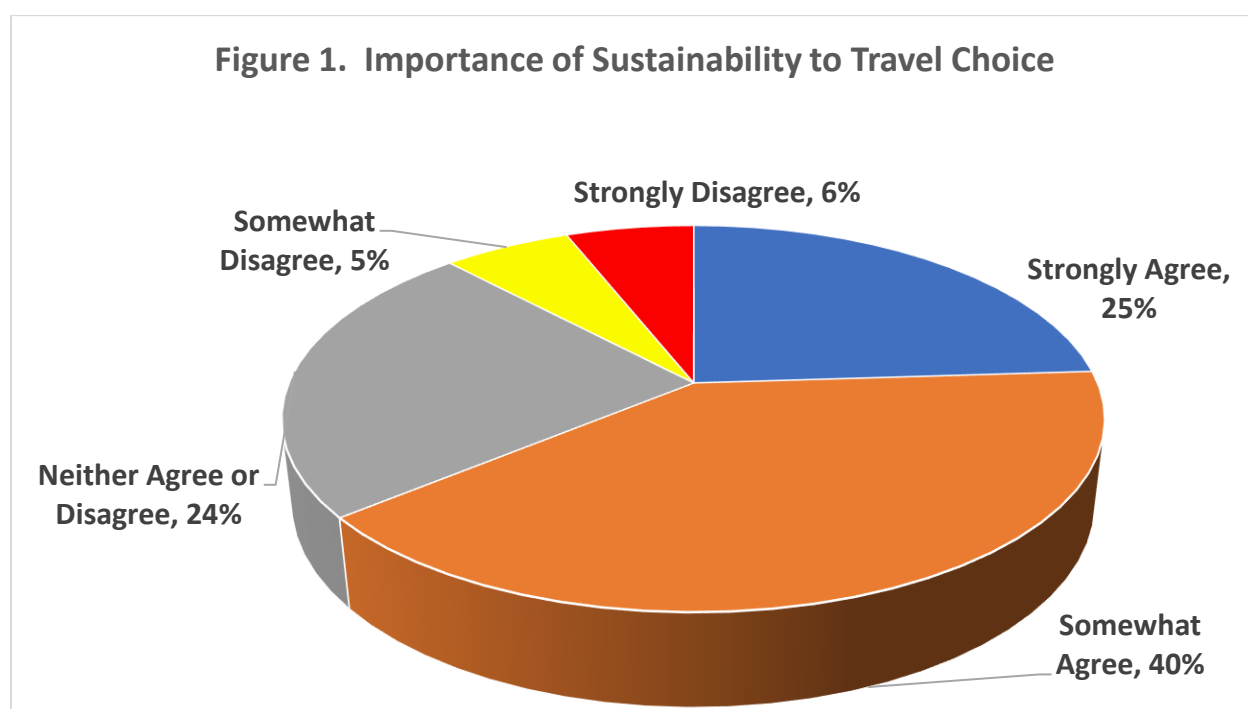
## Importance of Sustainability in Planning a Trip

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Survey respondents, from this pool of 2024 visitors, were asked how important sustainability factors are when they plan a trip. More than one out of four visitors “strongly agree” that sustainability is an important consideration, with nearly 40% noting that they “agree” that it is important.

Cumulatively, a strong majority (65%) positively support the importance of sustainability considerations in planning travel. This percentage has increased slightly over the last several years. A good portion (n24%) indicate neutrality in this question, and only 11% indicate that they “strongly disagree” or “disagree” with this statement.

Figure 1 depicts the complete results of this distribution of responses.



## Importance by Category of Sustainability - Social/Economic/Environmental

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The survey audience was asked about the importance of their travel decisions in the three core areas of sustainability: social, economic, and environmental sustainability. Environmental sustainability was the strongest area of expressed importance, with 98% of respondents selecting that it is “very” or “moderately” important to their decision. This declined from 99% responding as such in the prior year.

Ninety-seven percent (97%) of respondents expressed economic sustainability as “very” or “moderately” important, the same proportion that responded as such from 2023 visitation. Social sustainability was selected as “very” or “moderately” important by 85% of respondents, down slightly from 87% from the prior year.

### Perceived Sustainability of the Adirondacks as a Destination

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The survey asked respondents about the level of effort that they perceived the region as a travel destination, was making in these three sub-categories: social, economic, and environmental sustainability. Figures 2-4 depict these results. Among perceived efforts toward social sustainability, respondents noted a decrease from the prior year data by 4% in “significant” efforts and a 4% increase in “some” efforts.

Figure 2. Perceived Efforts for Social Sustainability of Adirondacks-

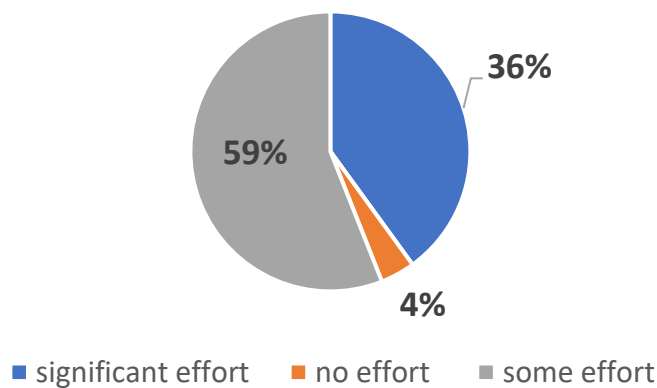


Figure 3. Perceived Efforts for Economic Sustainability

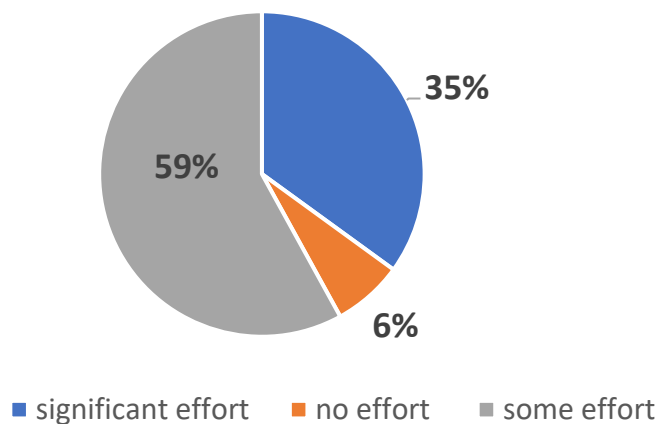
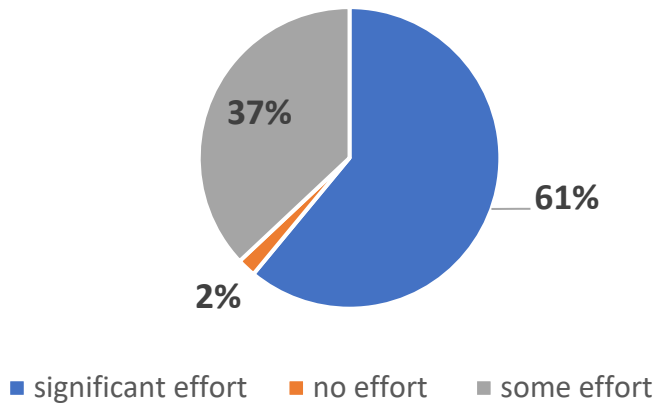


Figure 4. Perceived Efforts for Environmental Sustainability

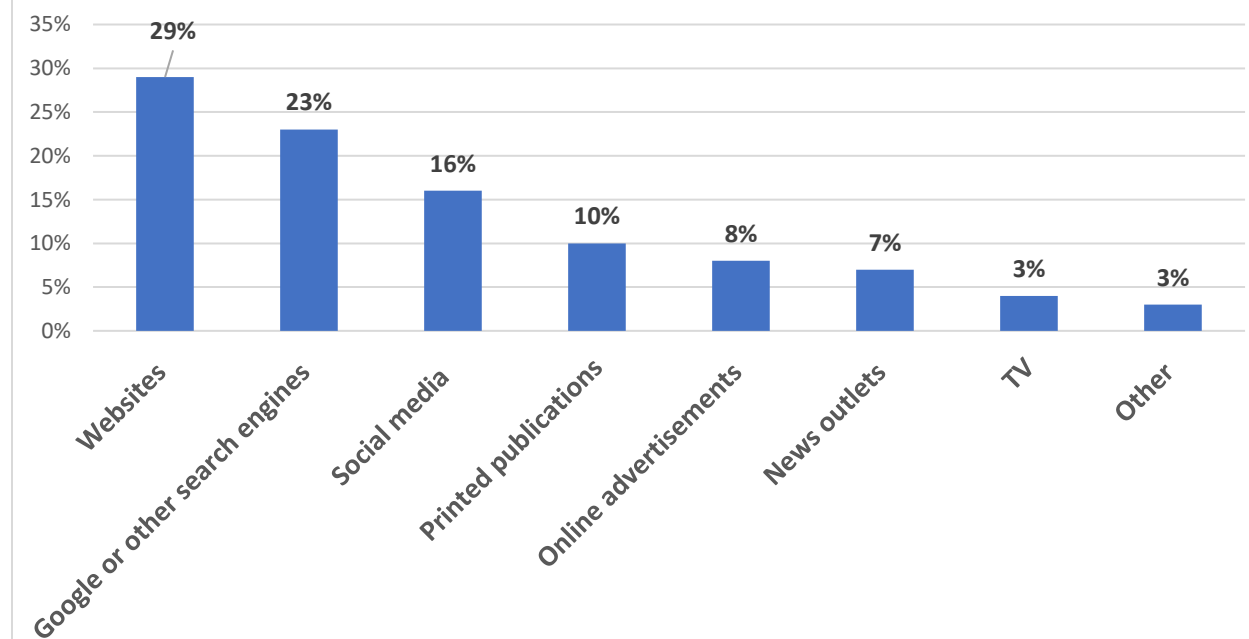


Among perceived efforts toward economic sustainability, there was only a slight change from the previous year: a 1% increase in those who said there had been "some" efforts, and a 1% decrease in those who said there were "no" efforts. Perceptions of efforts toward environmental sustainability stayed the same as the prior year.

### Travel Information: Sites for Sustainability Research

The survey asked visitors and potential visitors where they typically find their information about the sustainability of a destination, permitting as many responses as applicable. Figure 5 depicts the distribution of responses by source.

Figure 5. Source of Sustainability Travel Information

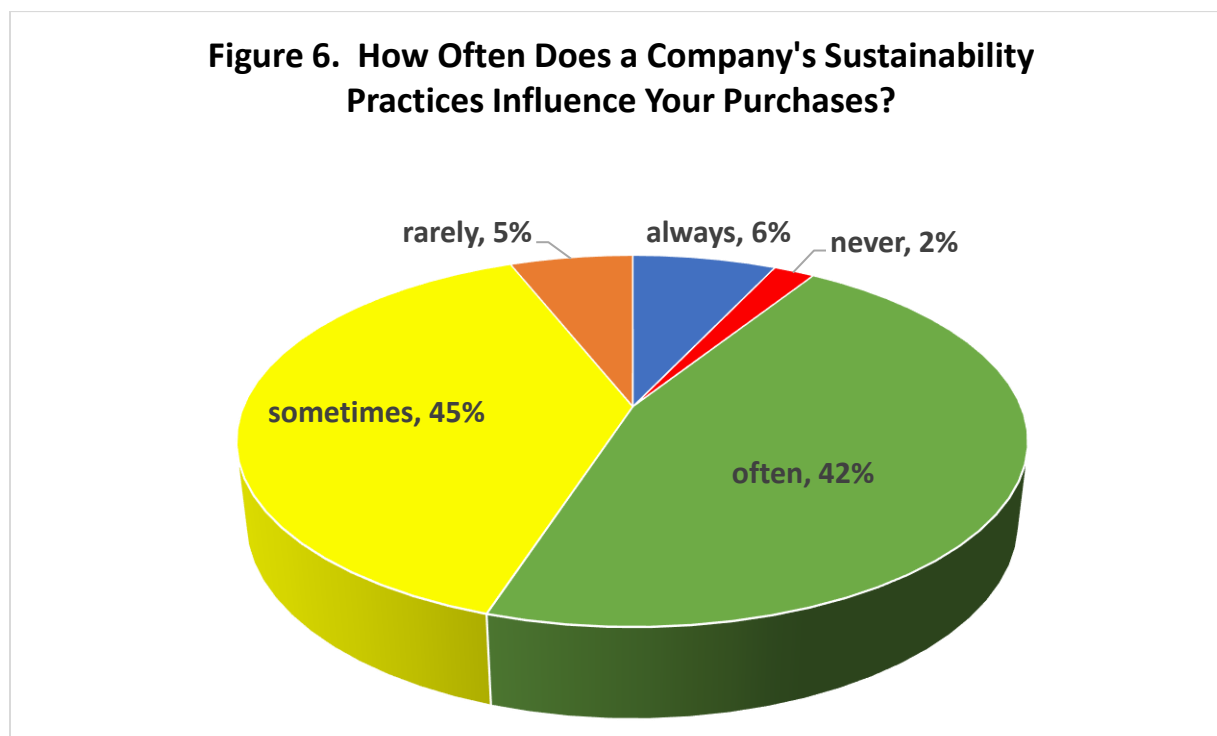


The results above have been consistent across the three years of data collection of this analysis.

### **Influence of Sustainability Practices**

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The survey asked respondents how often a company's sustainability practices influenced their decision to purchase from them. Figure 6 depicts these responses.



More than ninety percent (93%) of respondents indicate that sustainability at least “sometimes” affects purchase decisions. This is the same proportion as replied positively to this question in the prior year.

### **Impacts on Traveling Decisions by Sustainability Practices**

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The survey asked respondents to select from a list of provided sustainability practices they “looked for” when planning a vacation destination. Respondents were allowed to select as many as applicable.

The following list provides results from the most common to least common selections of the top responses (selected by nearly half or more respondents). The number of responses received for each category are noted as well.

1. Restaurants in the region buy from local suppliers: (864)

2. Businesses sell local artisan products and services: (639)
3. An effort to reduce single use plastics: (537)
4. Businesses in the region support the local economy: (519)
5. Businesses in the region give back to the community through work with local charities: (504)
6. Restaurants focusing on reducing food waste: (479)
7. Plans to manage hiking traffic and limit impacts on trails: (475)
8. Choosing road trips over airlines and cruises:(472)
9. Public transportation to popular attractions: (440)
10. Filtered refill stations for reusable water bottles-: (440)

Two of these are new to the “top 5” most selected interests in comparison to data from the prior year. They include a reduction of single use plastics (from #6 to #3) and businesses that give back to the community through work with local charities (from #8 to #5).

### Ease of Finding Information on Sustainability

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The survey asked respondents about the ease of finding information about the sustainability of a travel destination. A slight majority of respondents (58%) stated that it is “difficult” to find information, with the balance (42%) finding it “easy”. Those responding that this information is difficult to find increased by 2% from the prior year, back to the level expressed by 2022 respondents.

### Conclusion

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Sustainability has been a focus within ROOST for many years. This data collection and analysis marks the third year that a survey was conducted to gauge information specific to visitor perceptions regarding sustainability. It is important to keep in mind that this data is not a random representation of visitors but was self-selected by those who indicated that they were at least “somewhat” concerned about sustainability matters when traveling. The data continues to provide interesting indications of priorities by these visitors.

Travel experts emphasize that sustainability is a growing concern expressed by an increasing proportion of visitors. A National Geographic survey<sup>2</sup> found nearly half (42%) of U.S. travelers express an interest in “sustainable” travel. Only 15% of these interested respondents, however, responded that they had sufficient understanding of what this term means. This provides a great opportunity for the region to tap this demand and to

define and educate visitors about “Adirondack sustainability.” The data collected here provides continued insights into the perceptions and priorities of these visitors.

Green hotels, resorts, and experiences capture the growing interest in wellness tourism, which is a strengthening niche across the industry. The Adirondack region is extremely well poised to utilize sustainable practices as a marketing tool for individual and group markets.

Booking.com<sup>3</sup> conducted a study of over 31,000 travelers in 2024 to ascertain sustainability preferences. They found that among this random sample of all travelers, 83% responded that sustainability concerns were important, but almost half (44%) did not report that sustainability was a “primary concern”.

More than half of their survey respondents indicated that they wished to use more sustainable modes of transportation in travel (57%) and that they wished to reduce energy conservation in travel (54%). Almost three in four of the respondents (71%) indicated that they “wished to leave their travel destination in better shape than it was before their visit”. This is an impressive figure for the aspiration of tapping into visitors improving communities.

The continued multi-generational trend of interest in culturally authentic travel resonates with social sustainability interests. A Hilton Hotel study<sup>4</sup> explored travel preferences across multiple generations (from Baby Boomers to Millennials) and noted that authentic and place-centric travel preferences continue to be important. ROOST has sponsored socially minded celebrations and welcoming environments for visitors from all cultures. These activities are important to meet the goal for social sustainability.

The substantially greater proportion of respondents from outside of New York state who replied to this survey, channeled here because they initially indicated at least “some” interest in sustainability issues, is notable. Those coming from out of state and Canada are generally traveling further and may spend longer duration and therefore have greater expenditures.

This implies that perhaps this sub-set of sustainably minded visitors may provide a greater return to the community and its businesses than the average regional visitor. Coupled with the interest of many visitors to leave the communities they visit in better condition than prior to their visit, there are strong opportunities among these sustainability minded visitors. Maximizing these impacts and potential will be worth considering in the future. The data collected here is useful to better understand visitor preferences regarding sustainability and to monitor and concentrate on specific areas of agency interest.

## Sources Cited:

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1. Leisure Visitor Study for the Adirondack Region of Essex and Hamilton Counties, NY- Regional Office of Sustainable Tourism (ROOST) - [www.roostadk.com](http://www.roostadk.com) April 2023.
2. National Geographic- “For many travelers sustainability is the word- but there are many definitions of it”. Nationalgeographic.com - 6/28/22.
3. Booking.com “Sustainable Travel 2024”. April 2024.  
<https://news.booking.com/download/904910>
4. Hilton, Inc. “Trends Report- What Millennials, Gen Z, Gen X and Baby Boomers Tell Us About the Year Ahead”. December 2024.



## **Appendix A.**

### **Table of Responses (#) for Sustainability Factors Sought for Travel Decisions**

Restaurants in the region buy from local suppliers: 864

Businesses sell local artisan products and services: 639

An effort to reduce single use plastics: 537

Businesses in the region support the local economy: 519

Businesses in the region give back to the community through work with local charities: 504

Restaurants focusing on reducing food waste: 479

Plans to manage hiking traffic and limit impacts on trails: 475

Choosing road trips over airlines and cruises: 472

Public transportation to popular attractions: 440

Filtered refill stations for reusable water bottles: 440

Businesses using renewable sources of energy: 423

Businesses donate to local nonprofits: 325

Lodging and restaurants partnering with local compost producers: 318

Bicycles rentals available as a means of transportation: 304

Use of environmentally safe snow removal practices (e.g. avoiding the use of products with high salt concentrations): 298

The ability to donate money to support environmental efforts in the region: 281

Availability of electric vehicle charging stations: 123

Zoning restrictions to prohibit short term rentals: 95

None: 46

Other (please specify): 18