



Leisure Travel Study

Essex and Hamilton Counties, Saranac Lake, and
Tupper Lake

2023 COUNTY VISITOR PROFILES AND REGIONAL RETURN
ON MARKETING INVESTMENT ANALYSIS

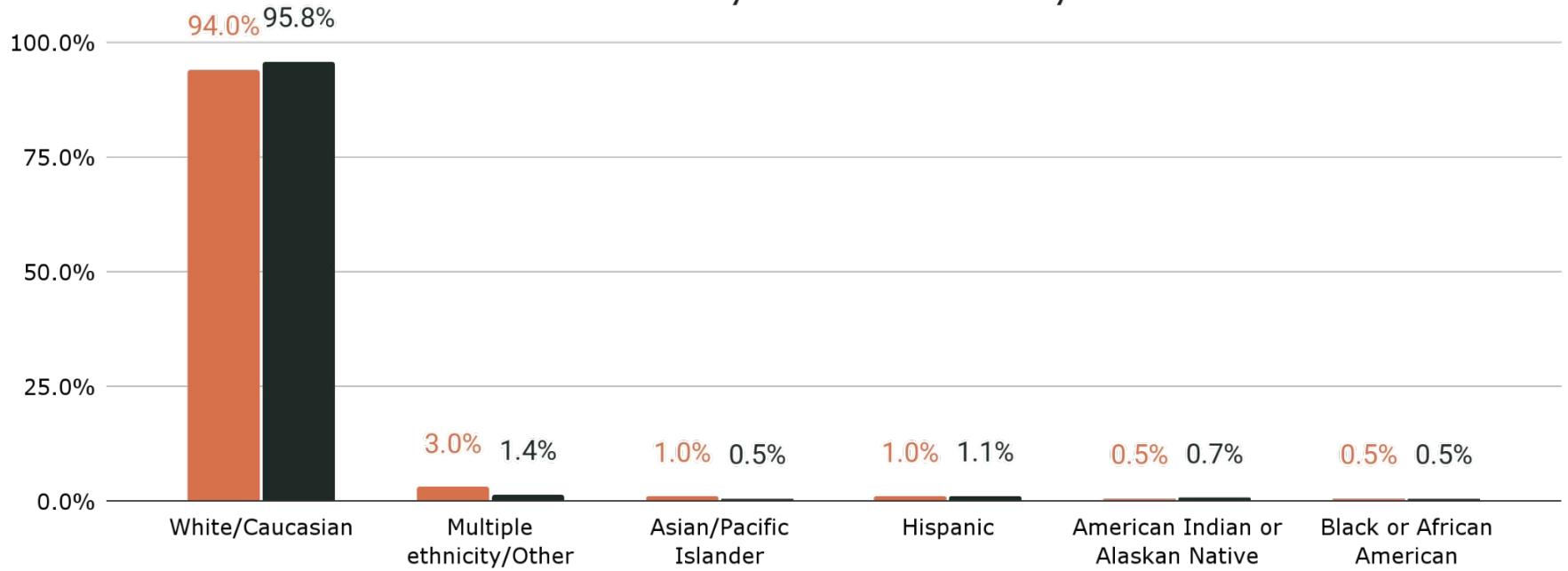
ROOST

Project background and methodology

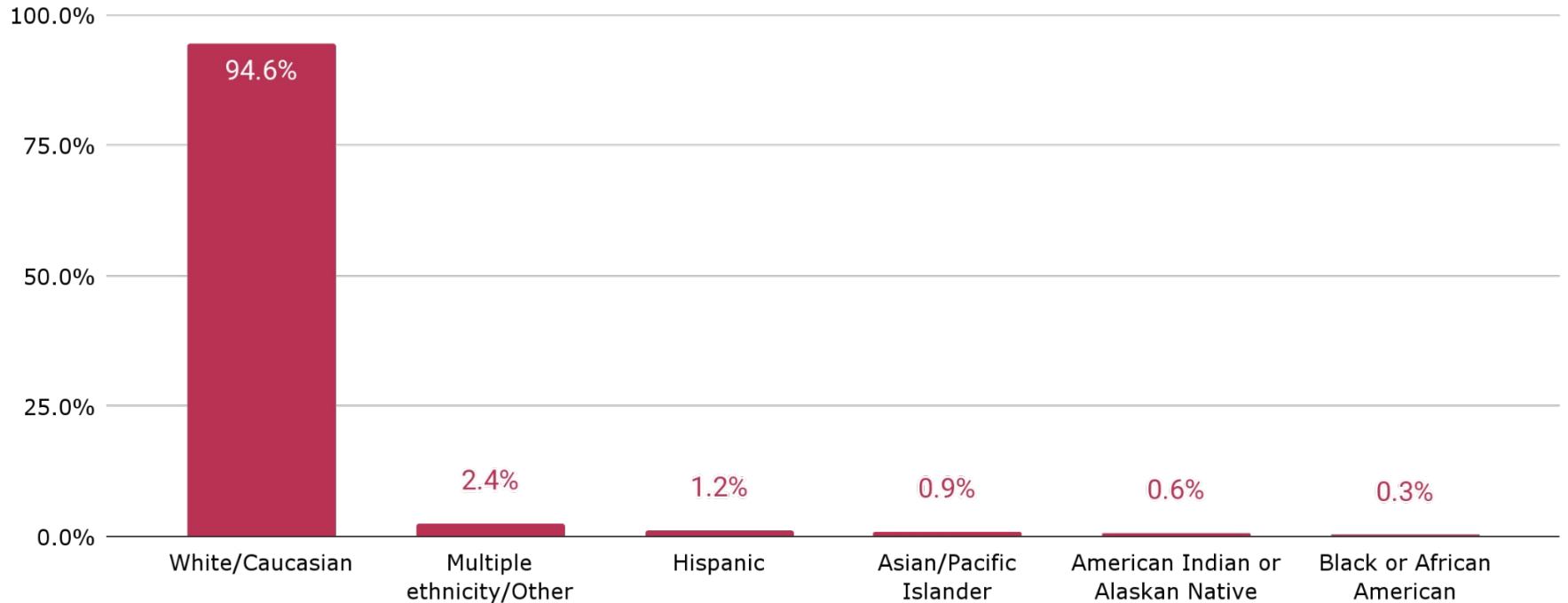
- ROOST commissioned a study with PlaceMaking, a regional community and economic development research firm, to determine visitor information at the county levels and to gauge key regional marketing program statistics.
- ROOST sent a jointly created survey to a sample of its 2023 leisure travelers to the region. This year's study marks 20 years of ROOST and partners completing this visitor research. 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 the region.
- In this report, "all travelers" refers to visitors to Essex and Hamilton counties, and the villages of Tupper Lake and Saranac Lake in Franklin County.
- 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 228,324 traceable leads who were interested in visiting the region in 2023. PlaceMaking also compiled similar research for Essex and Hamilton counties individually, which are available under separate covers.
- ROOST also commissioned a separate study that ascertained visitor opinions and perceptions about sustainability relative to travel decisions, which is available under a separate cover.

Ethnicity

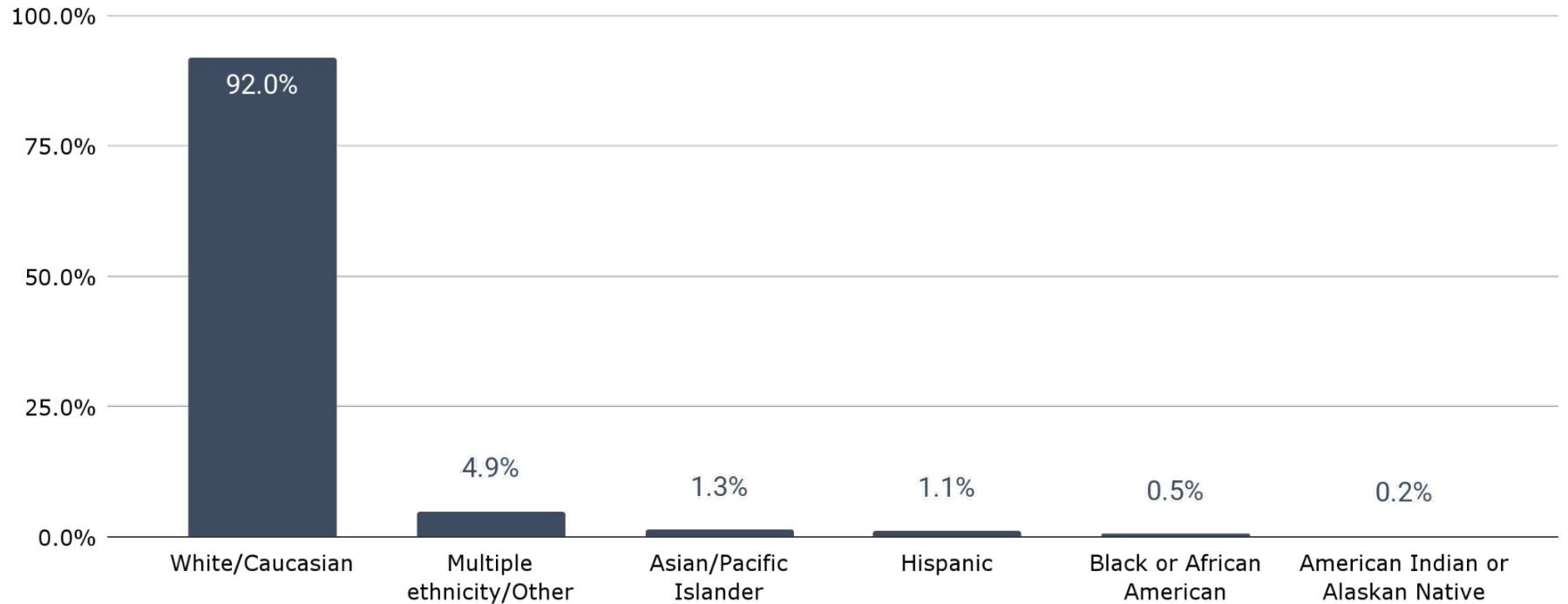
■ Essex County ■ Hamilton County



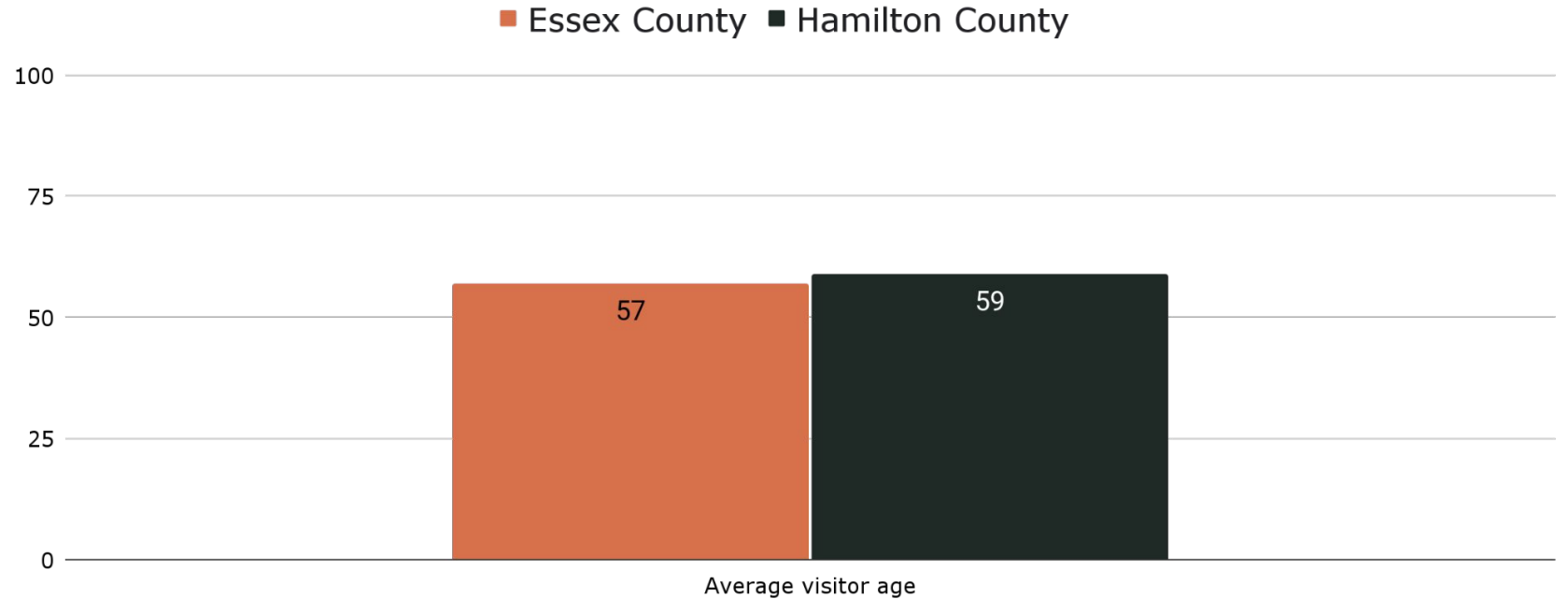
Ethnicity - Day trippers



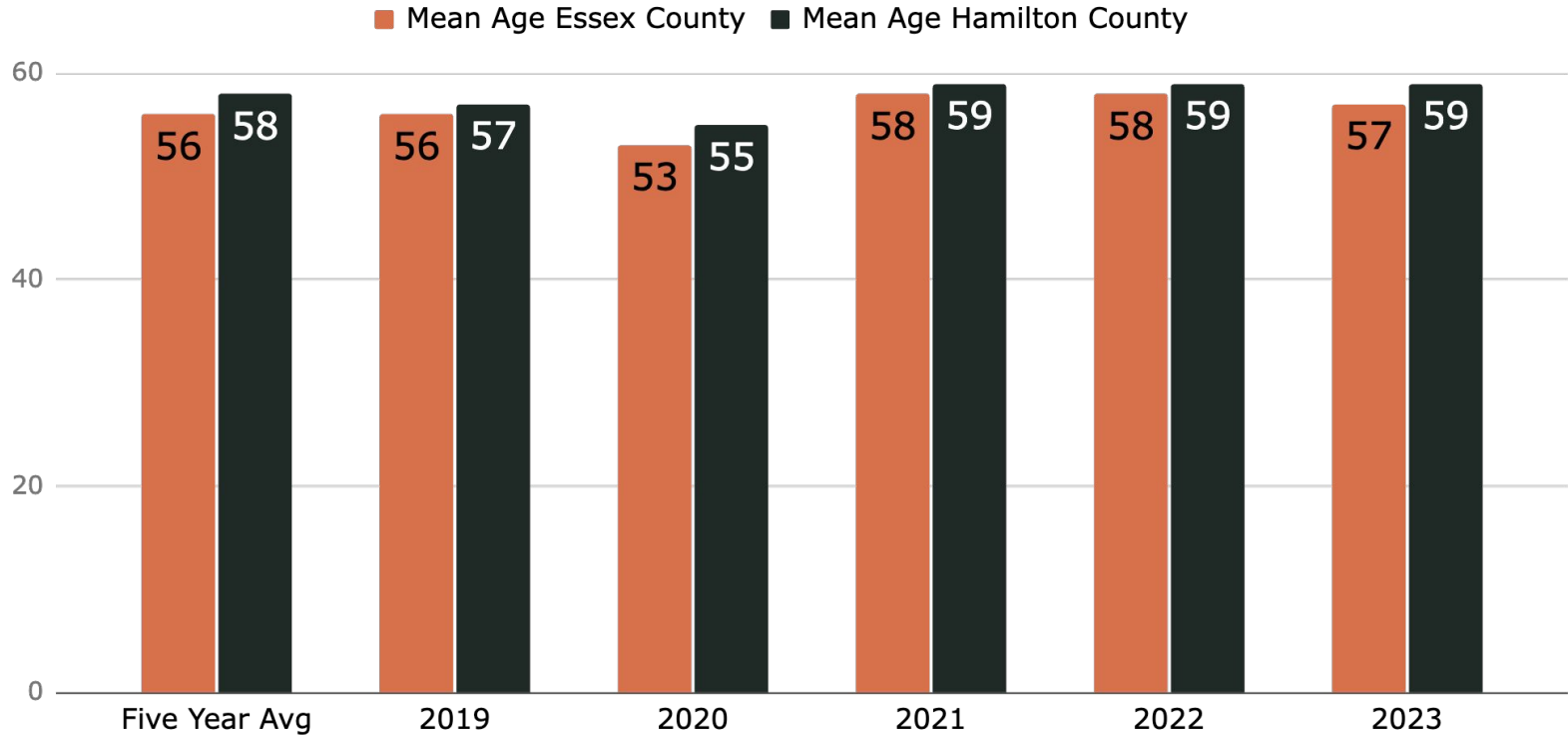
Ethnicity - Short-term renters



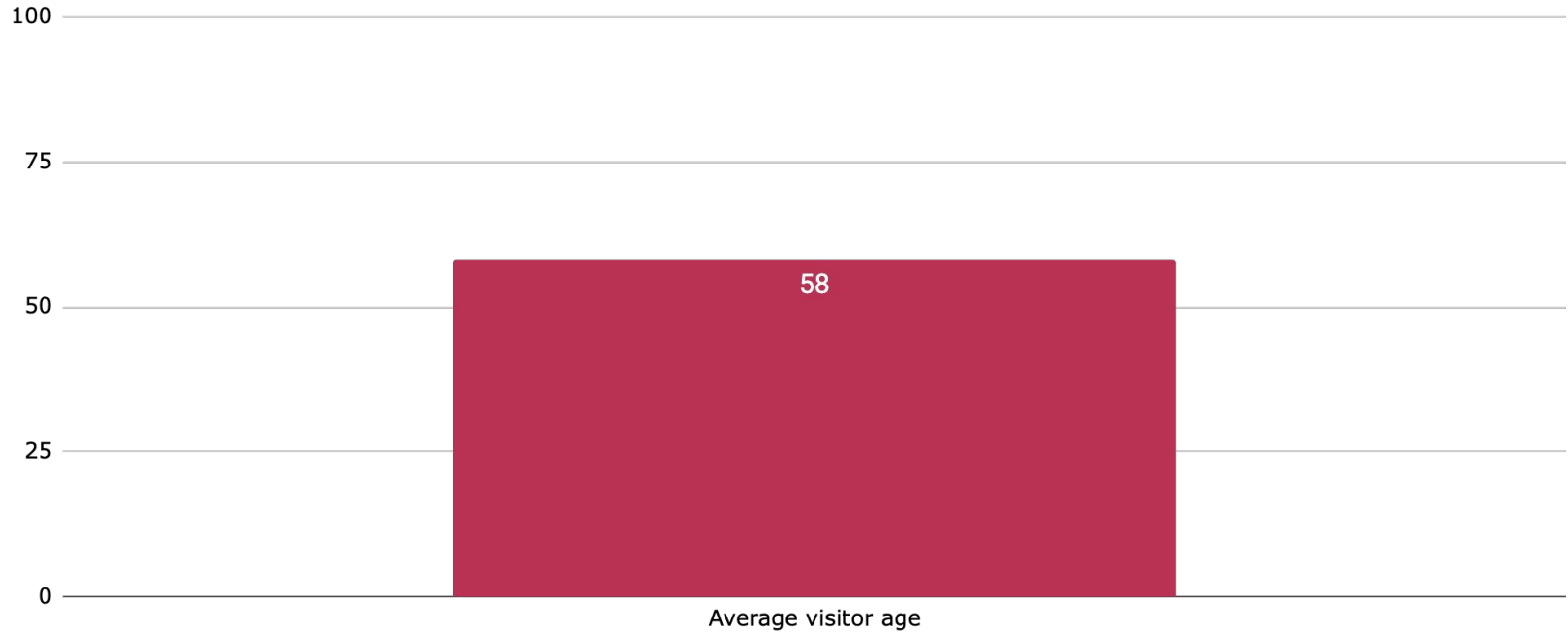
Average age



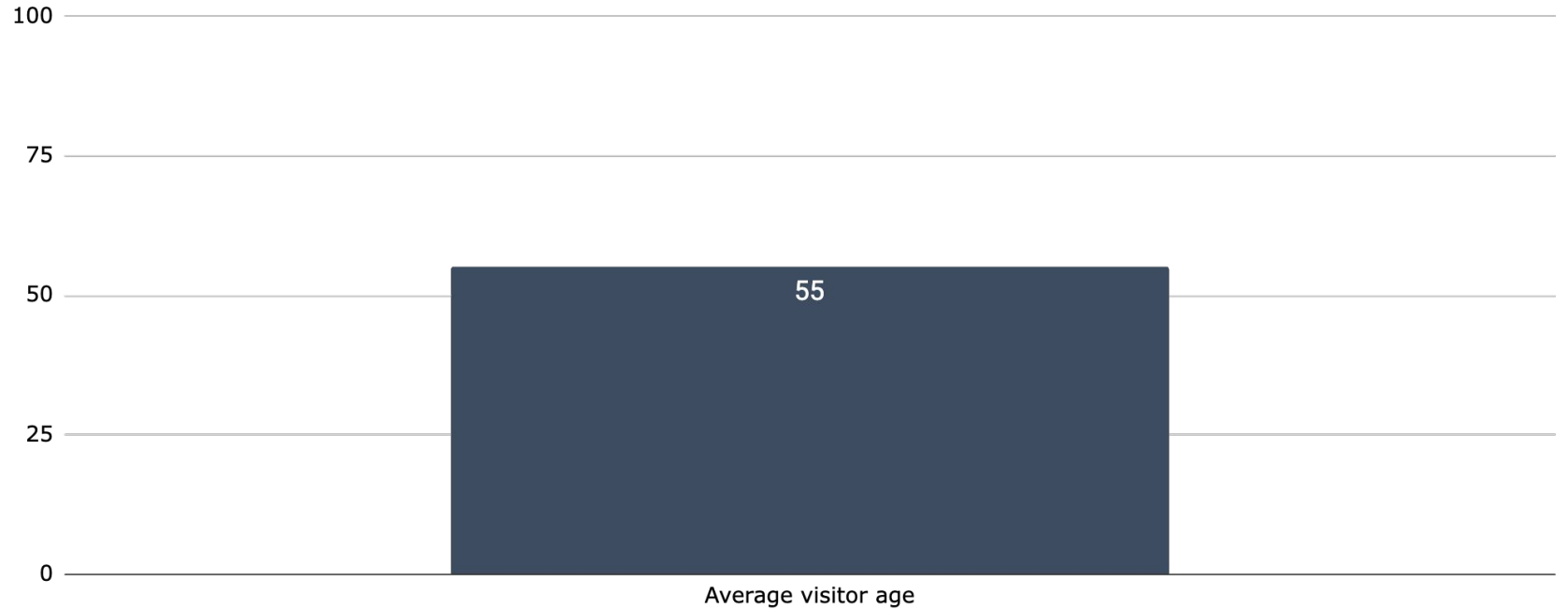
Five year average age



Average age - Day trippers

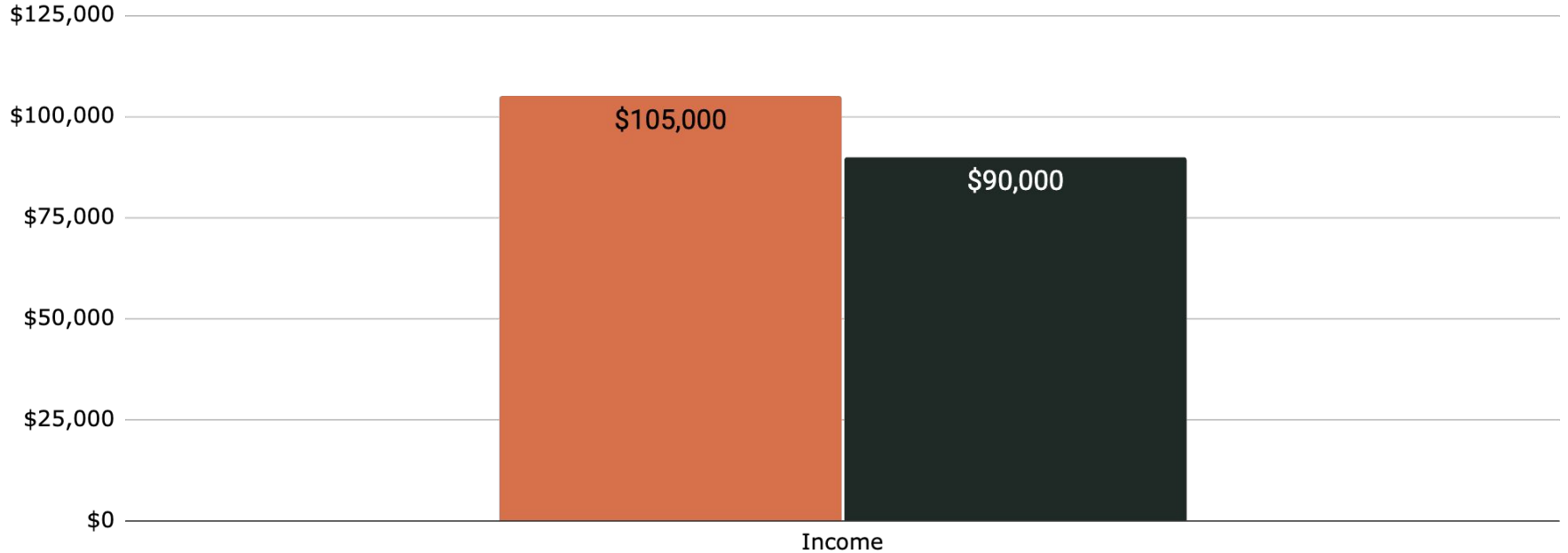


Average age - Short-term renters



Average income

■ Essex County ■ Hamilton County



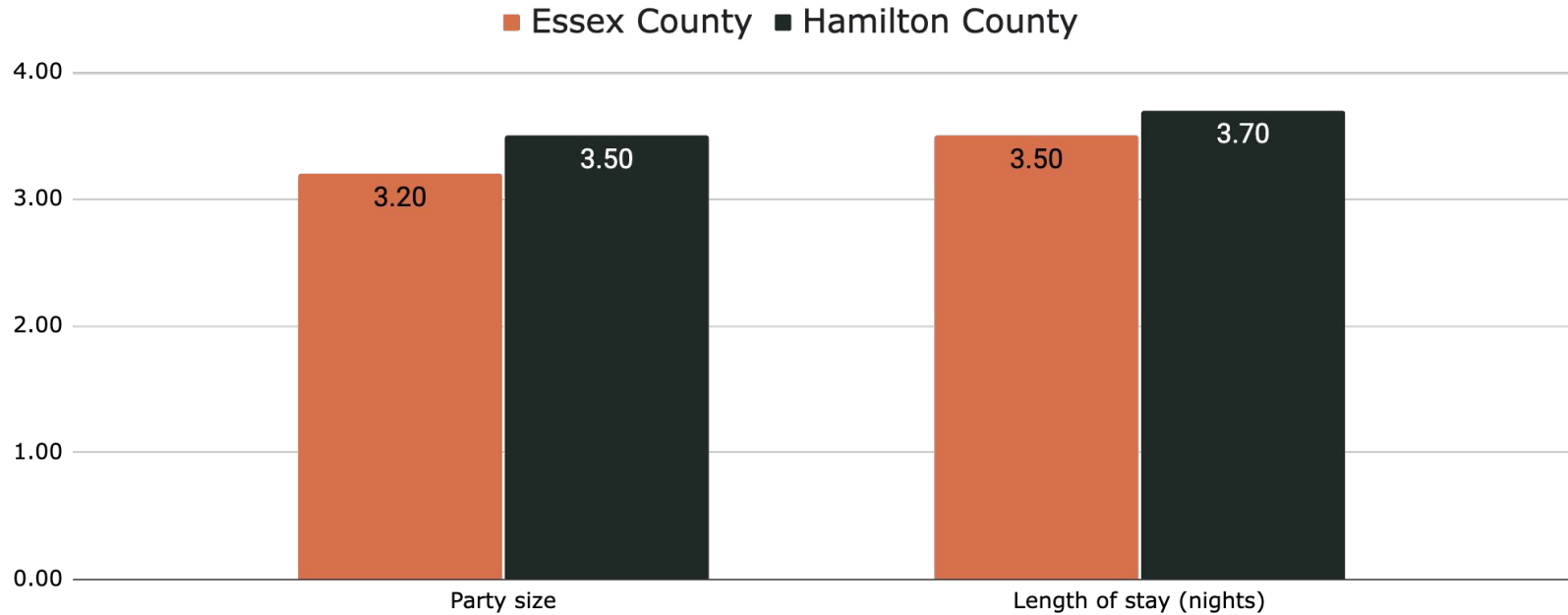
Average income - Day trippers



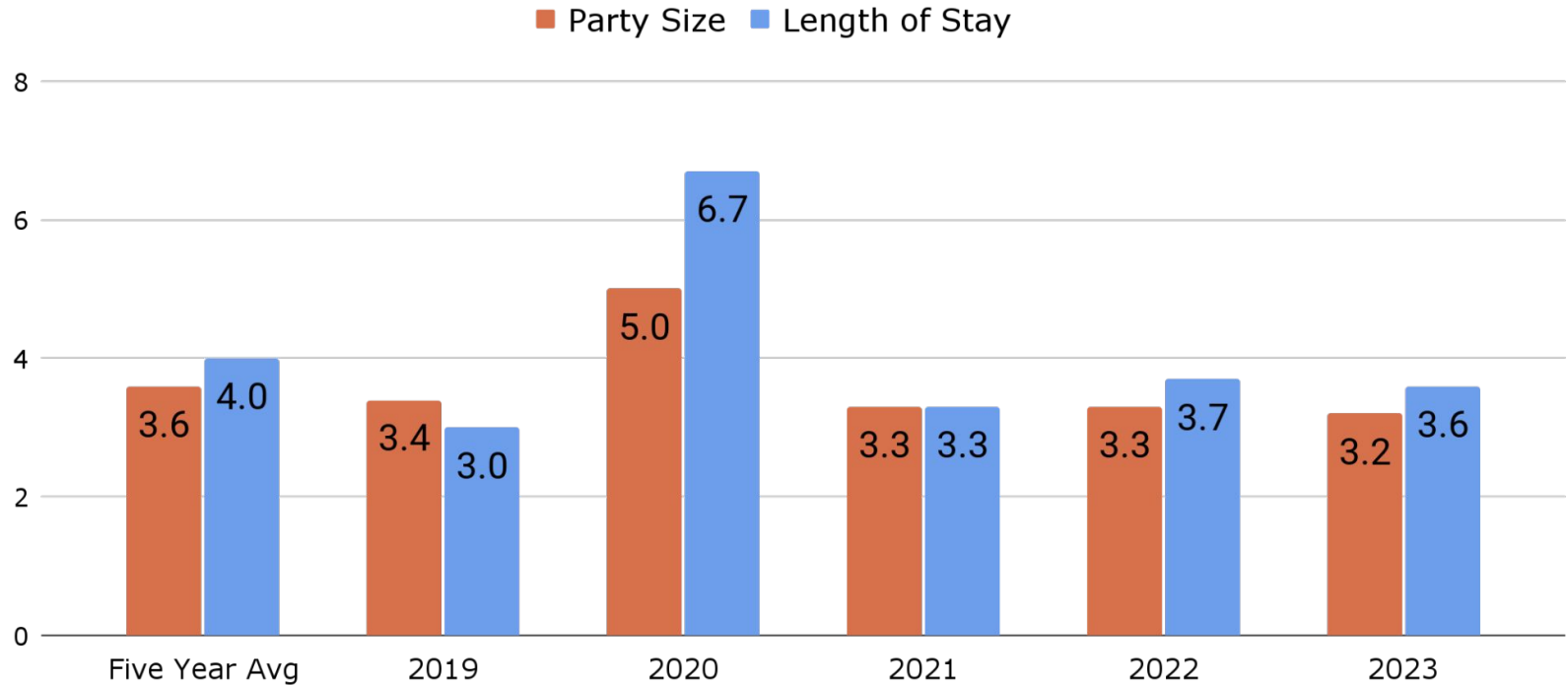
Average income - Short-term renters



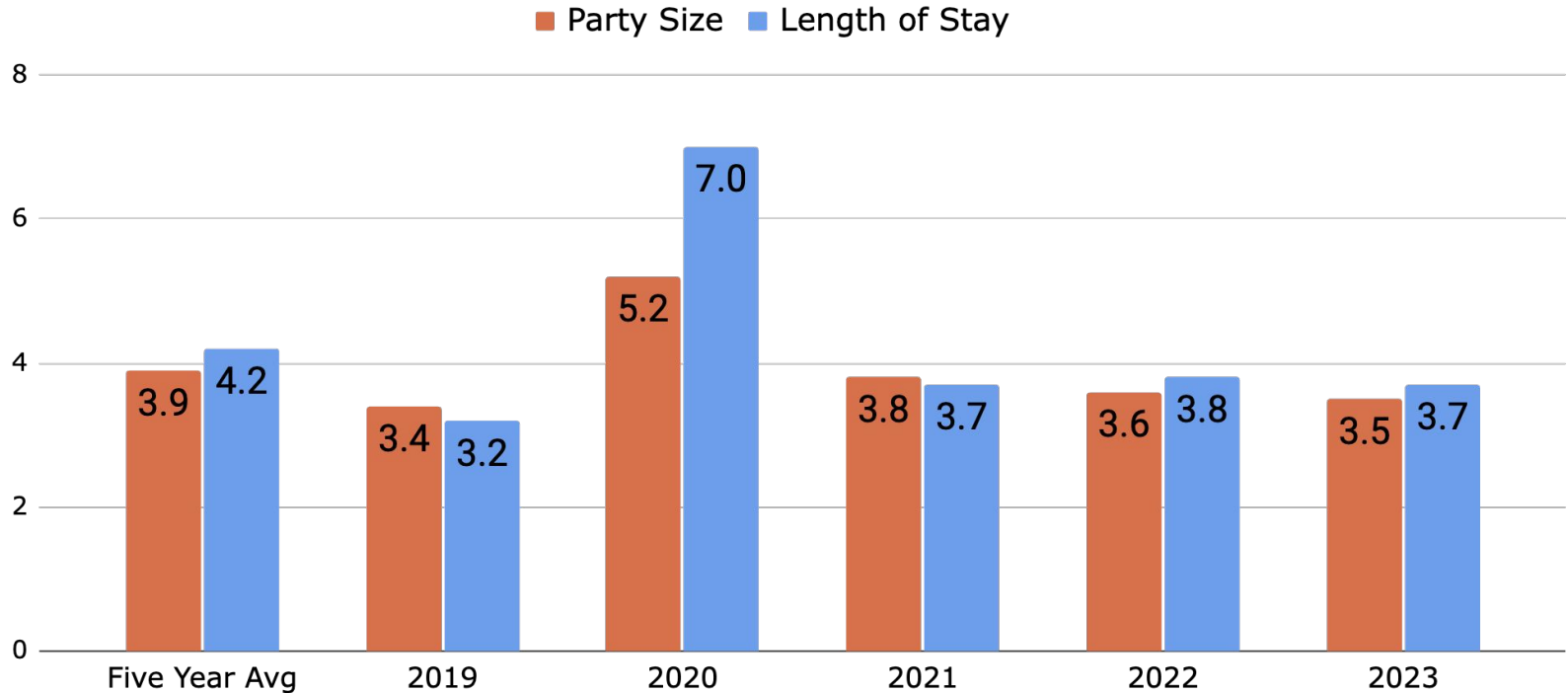
Party size / Length of stay



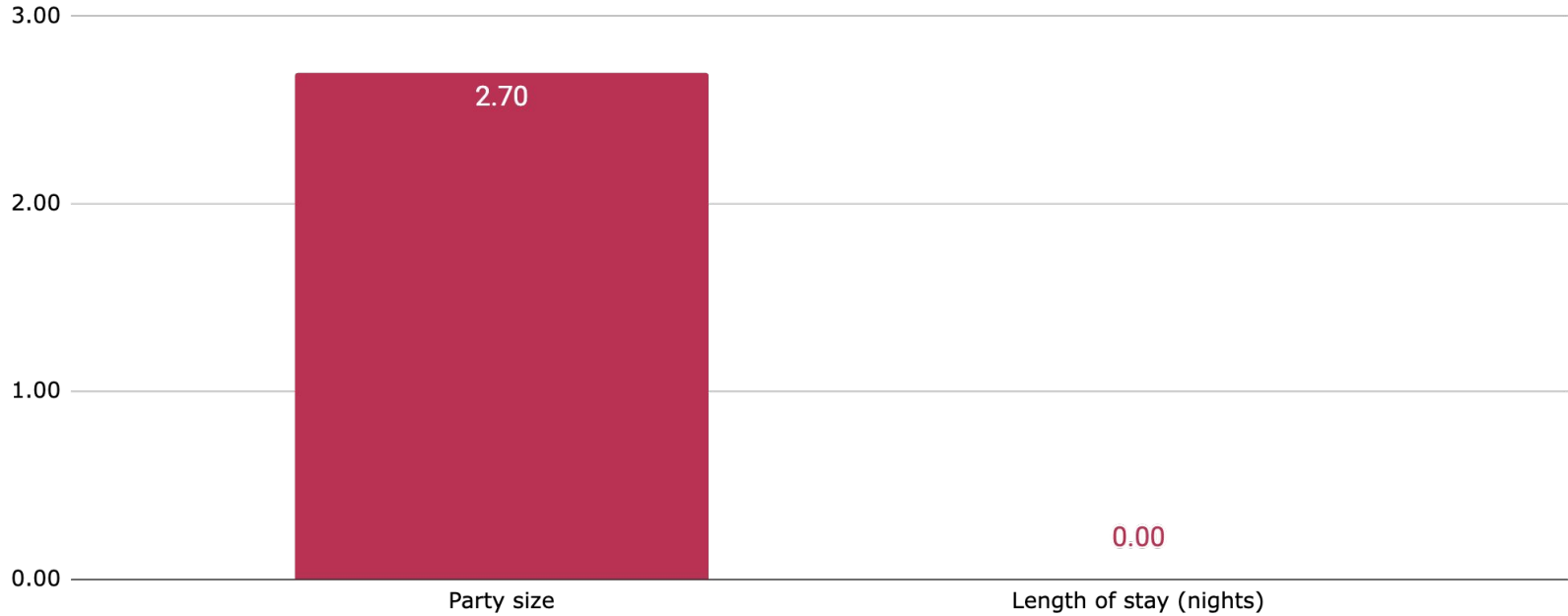
Five year average party size / Length of stay - Essex County



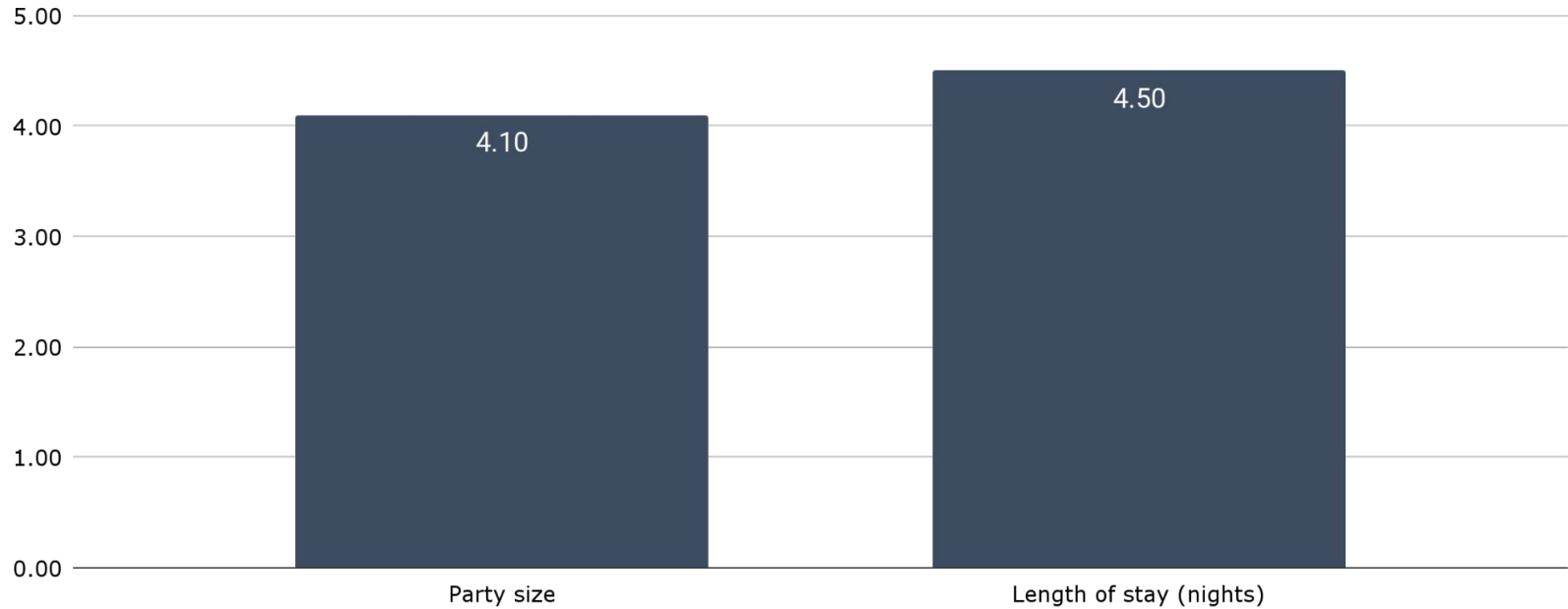
Five year average party size / Length of stay - Hamilton County



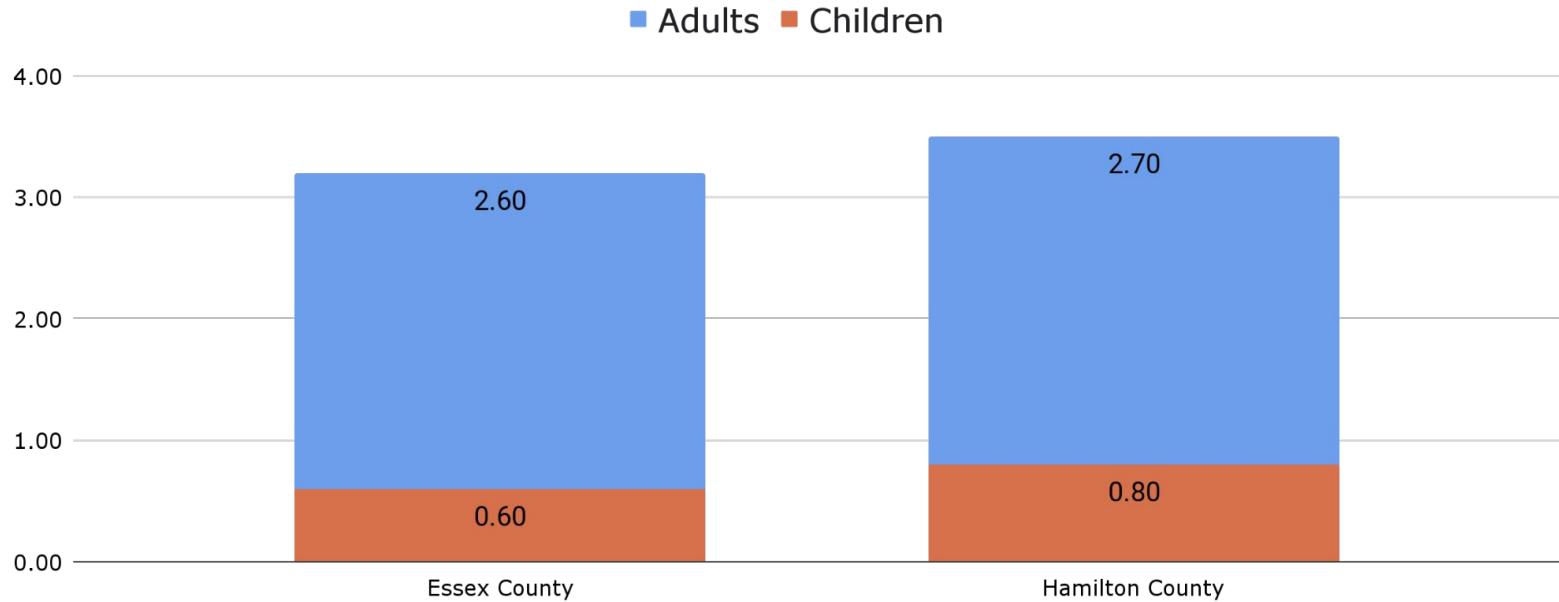
Party size / Length of stay - Day trippers



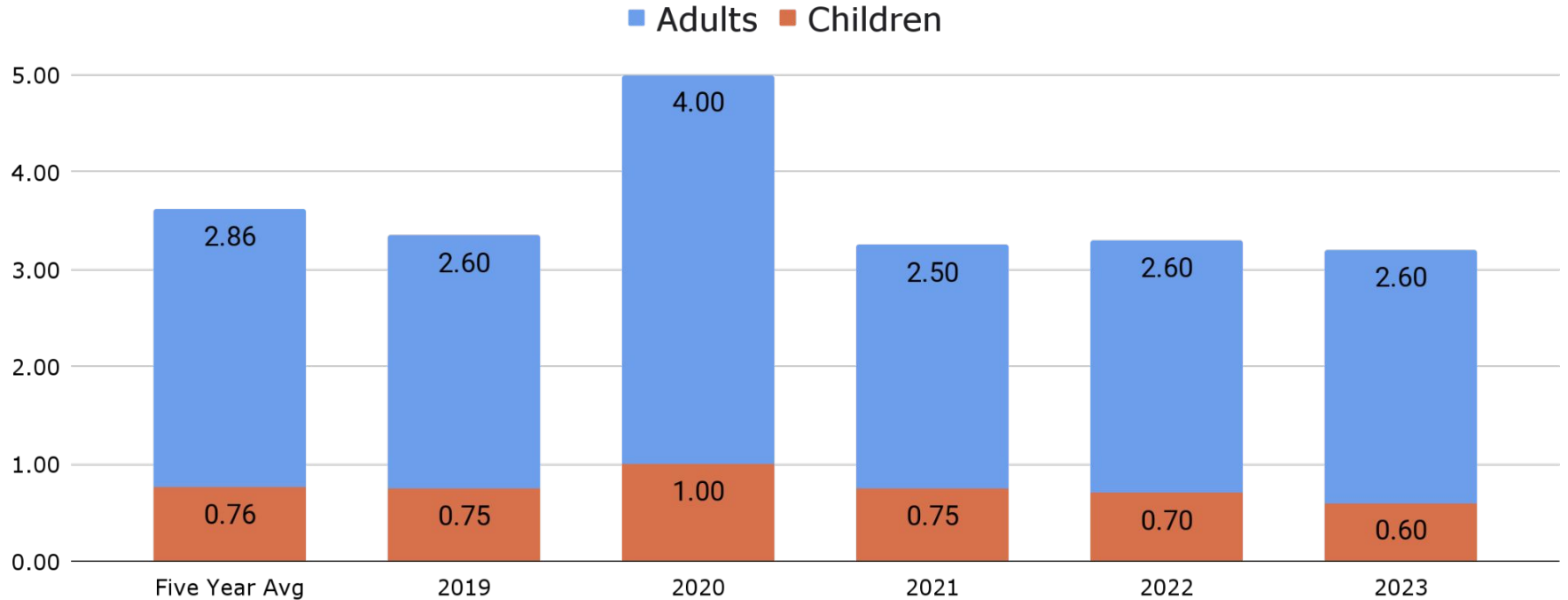
Party size / Length of stay - Short-term renters



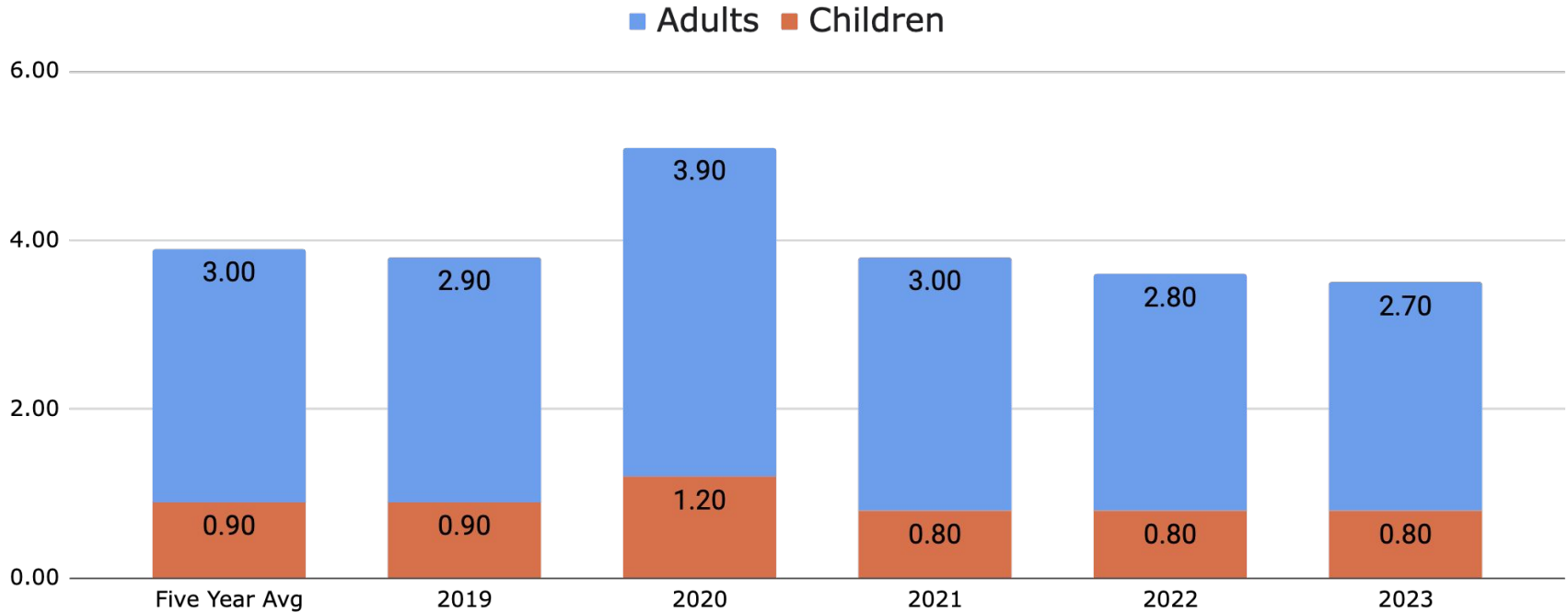
Party composition



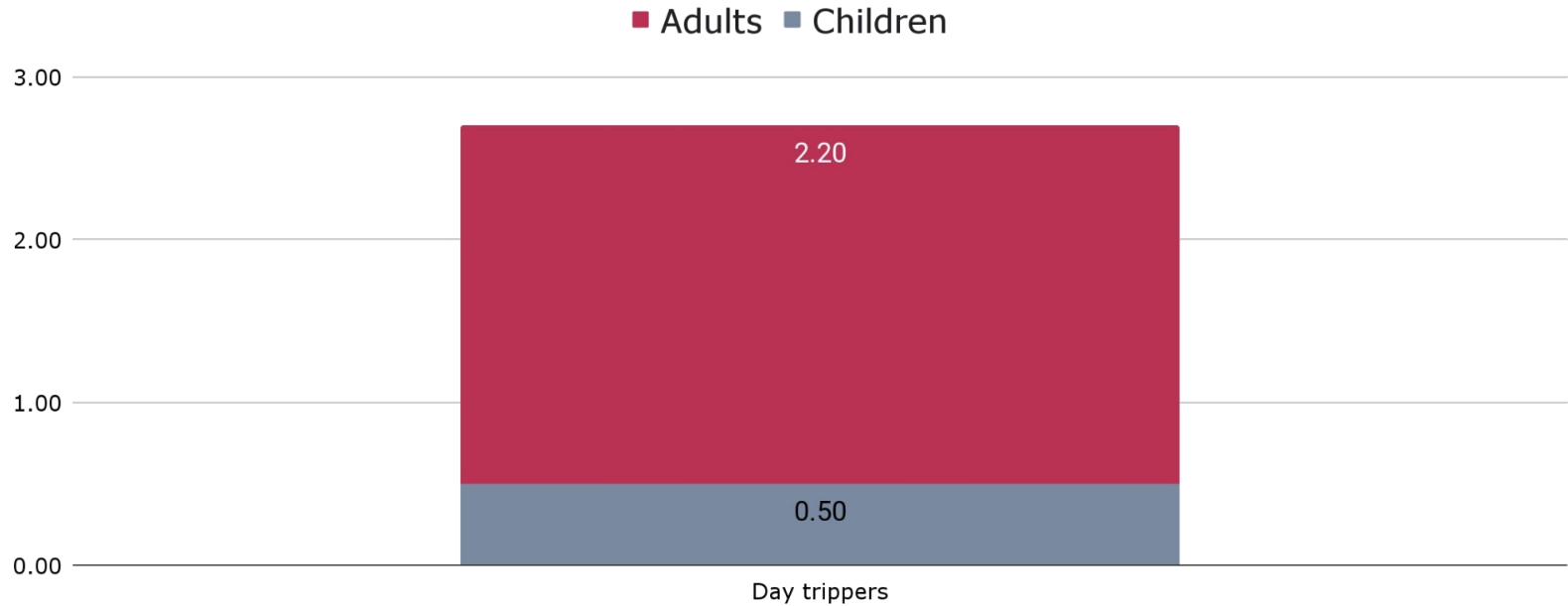
Five year average party composition - Essex County



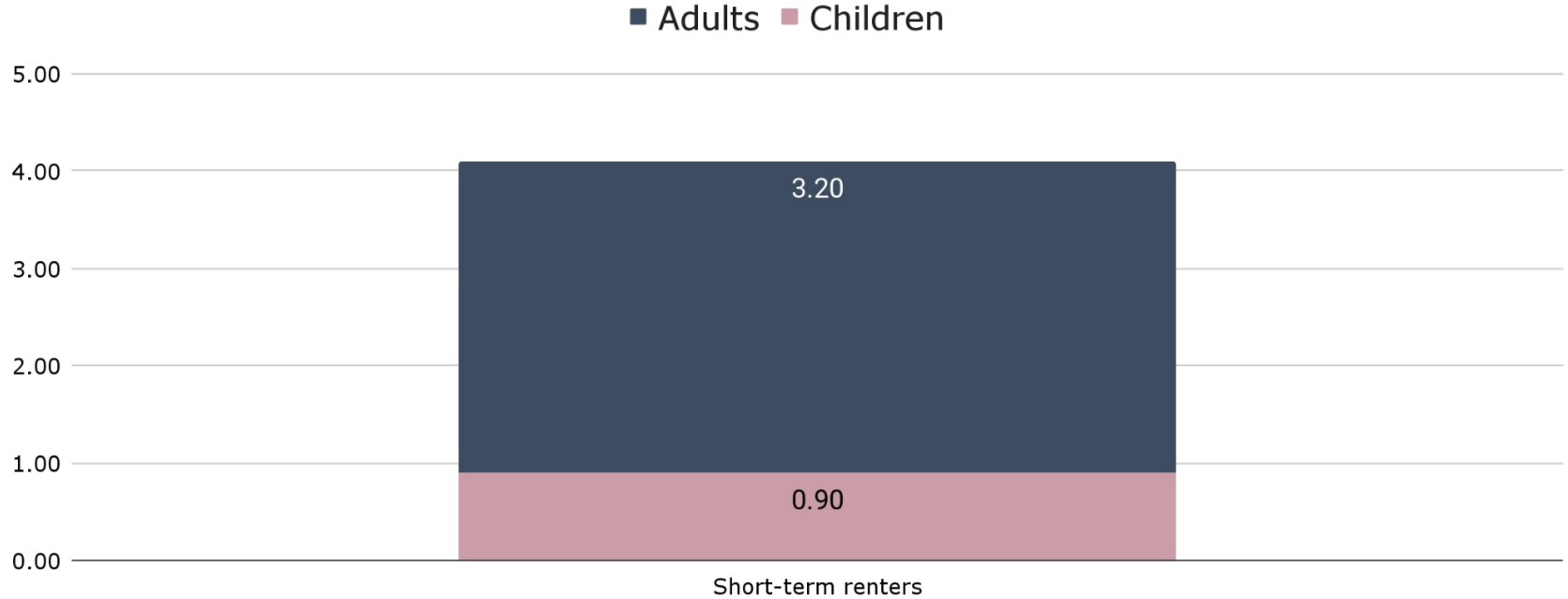
Five year average party composition - Hamilton County



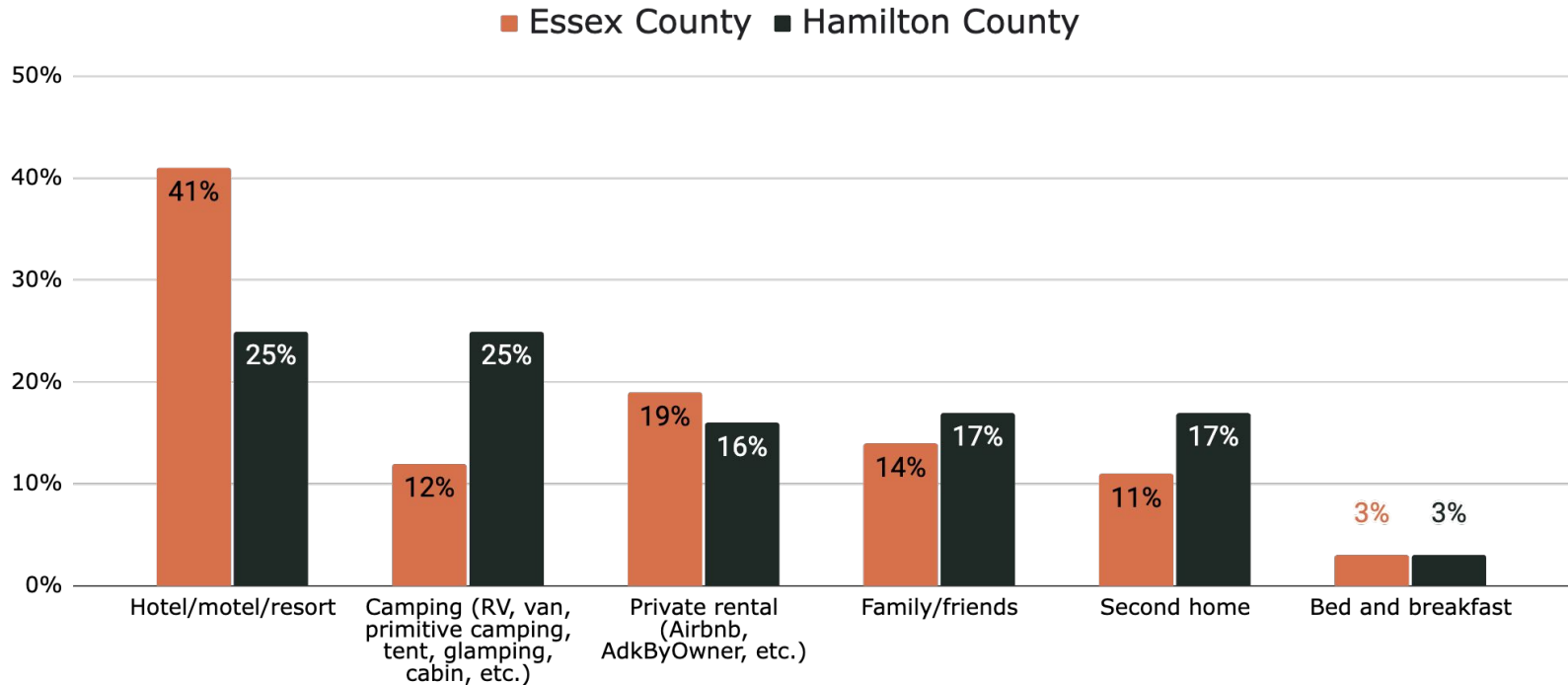
Party composition - Day trippers



Party composition - Short-term renters

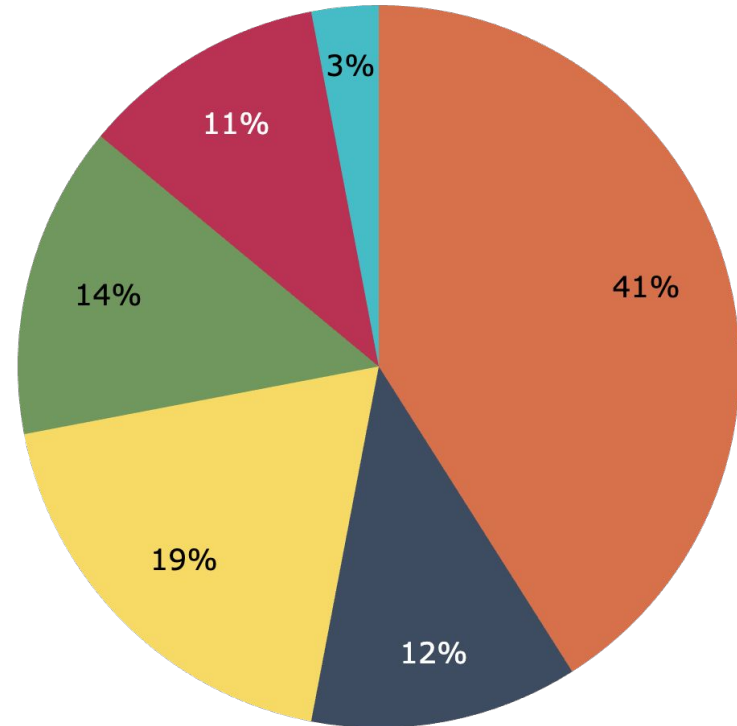


Lodging accommodations



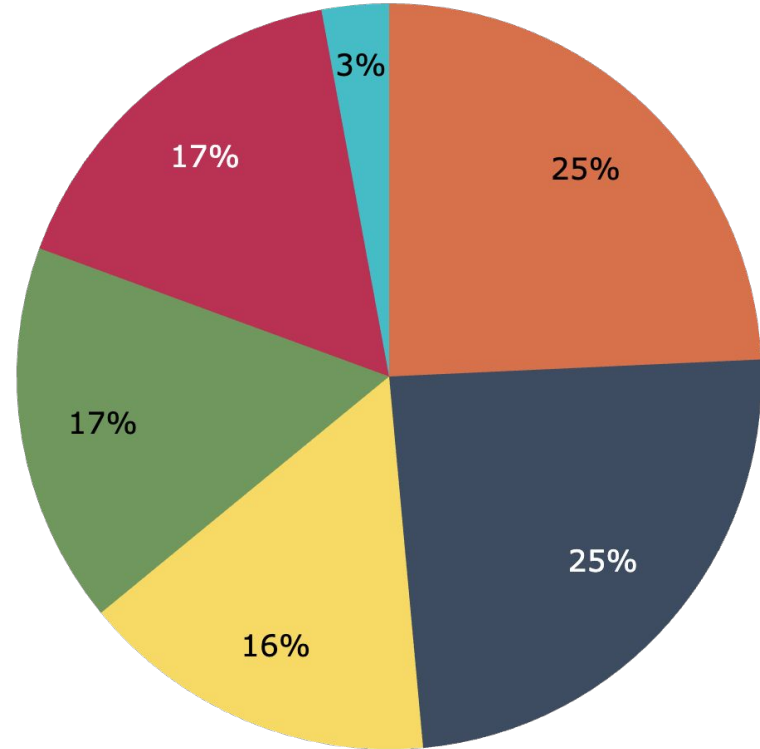
Lodging accommodations - Essex County

- Hotel/motel/resort
- Camping (RV, van, primitive camping, tent, glamping, cabin, etc.)
- Private rental (Airbnb, AdkByOwner, etc.)
- Family/friends
- Second home
- Bed and breakfast

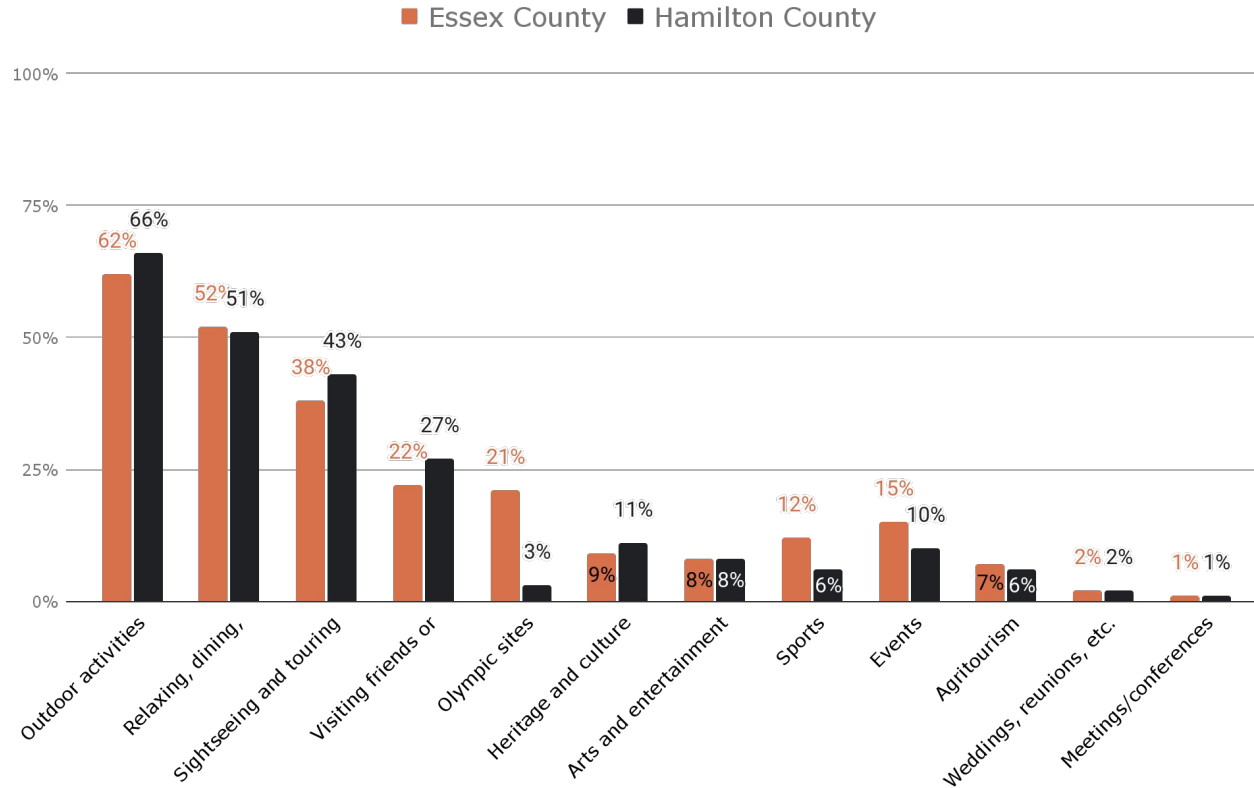


Lodging accommodations - Hamilton County

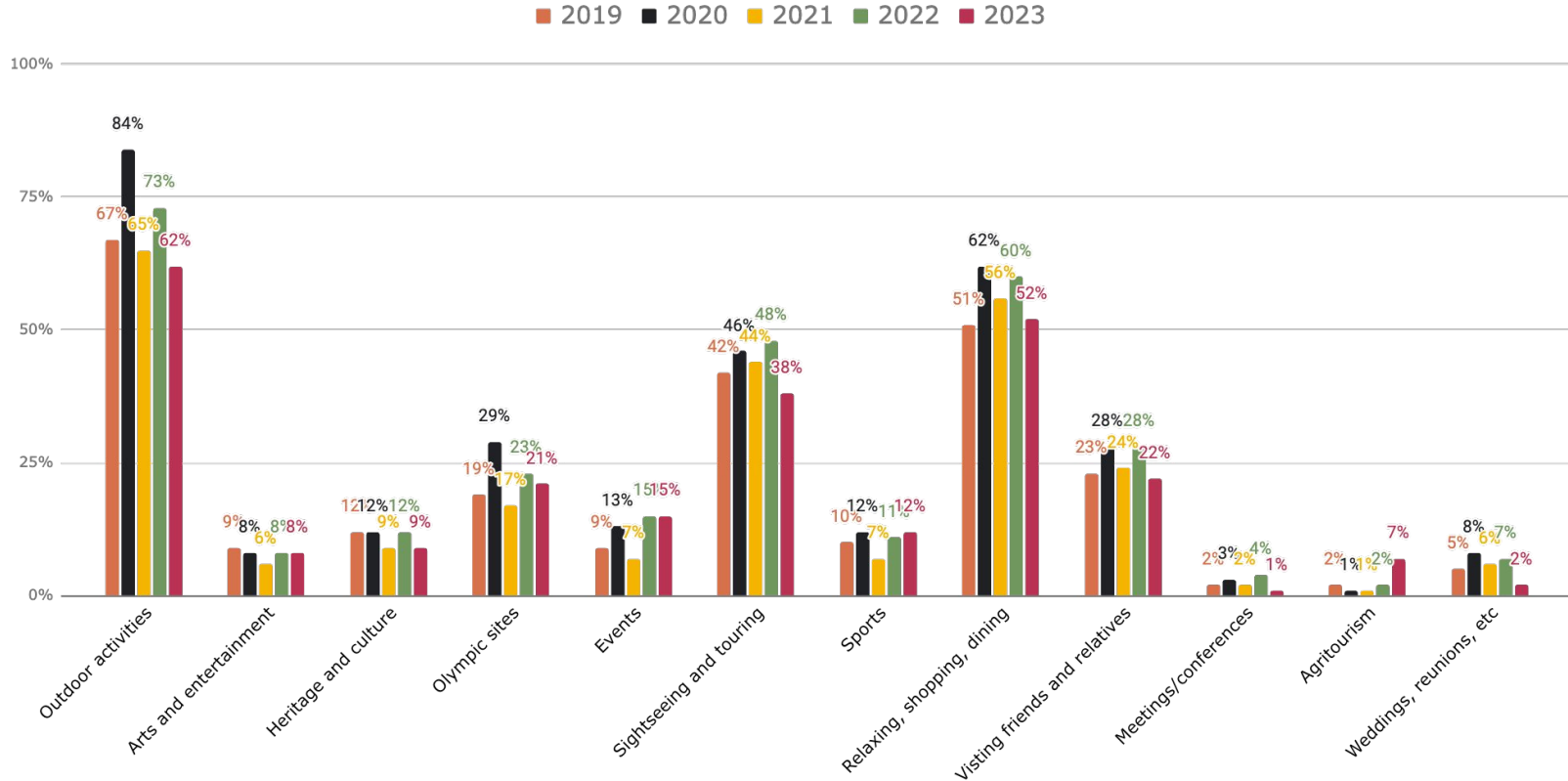
- Hotel/motel/resort
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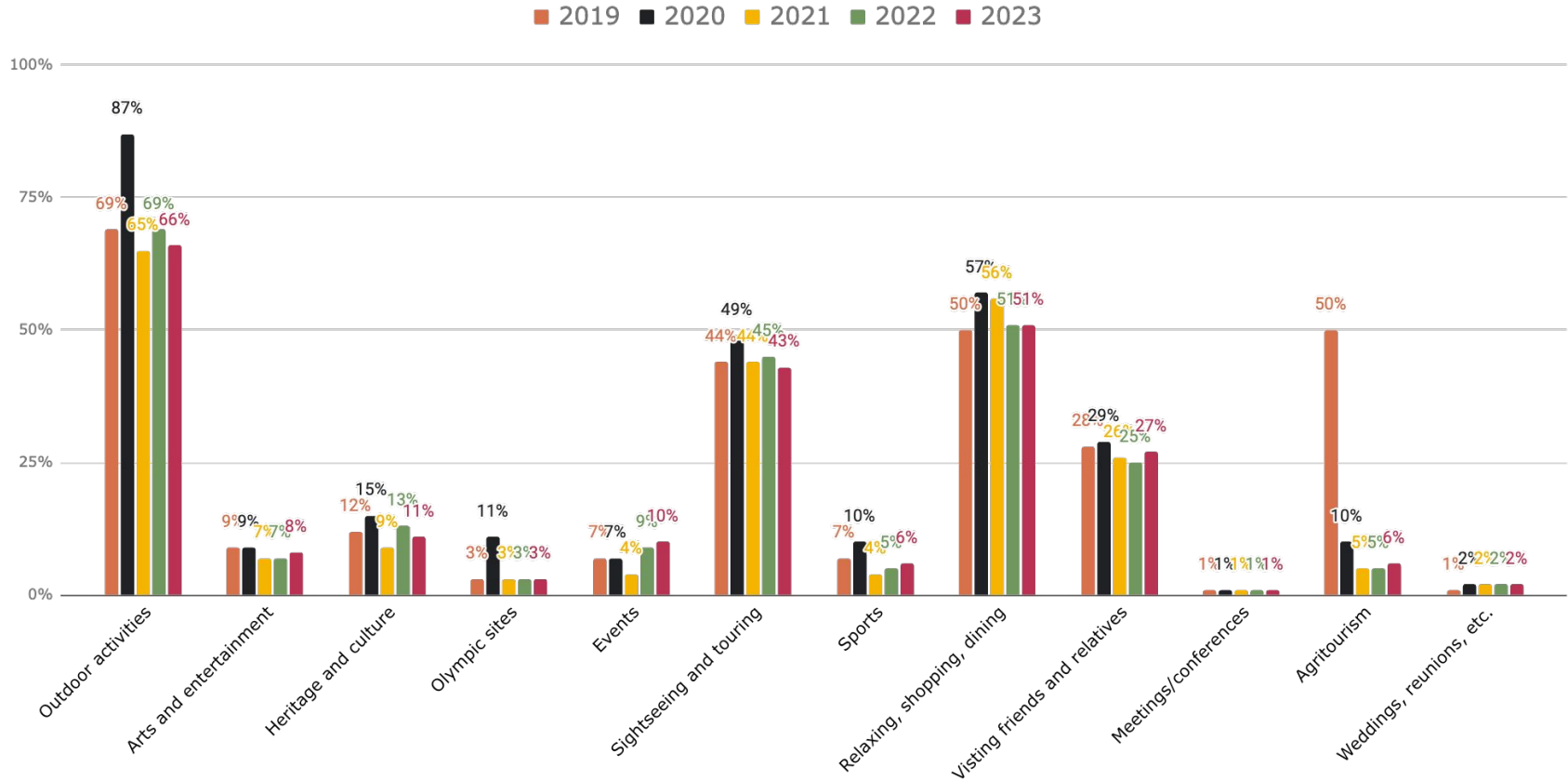
Key attractions



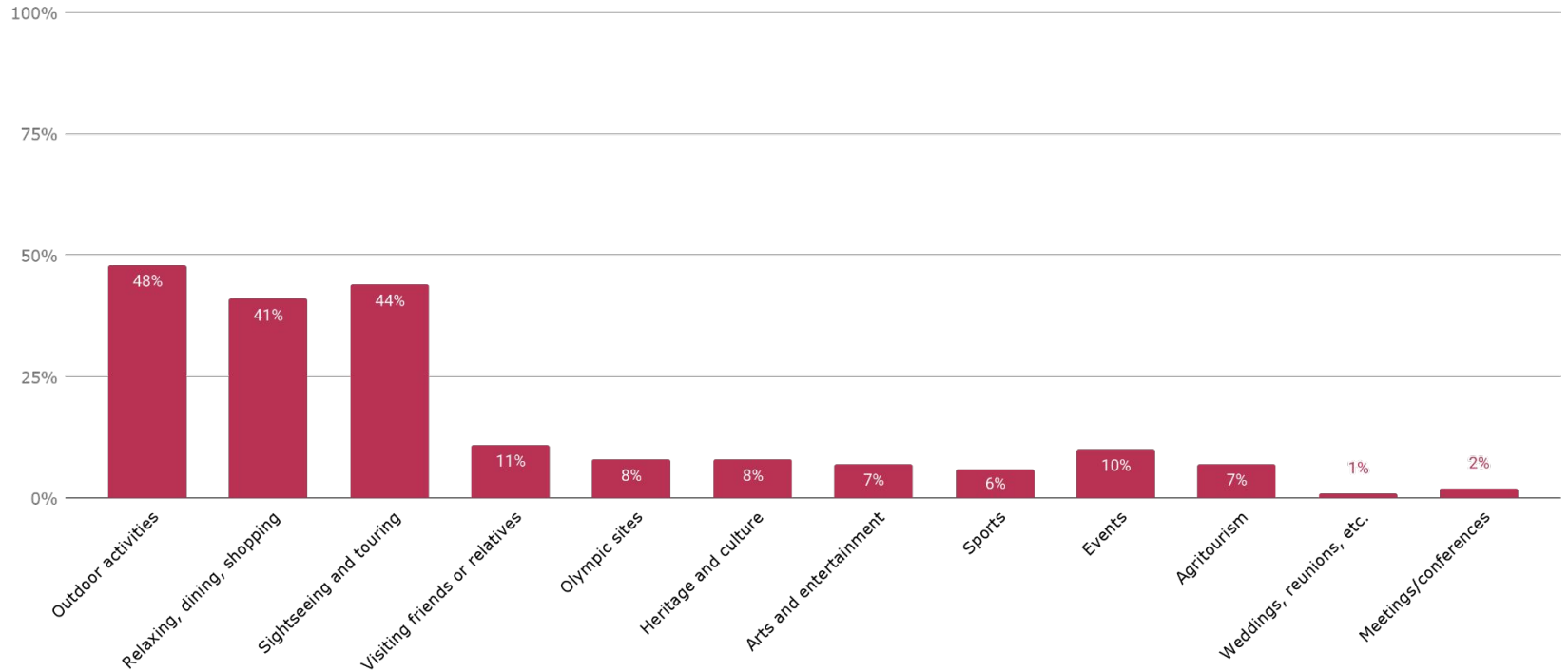
Five year key attractions - Essex County



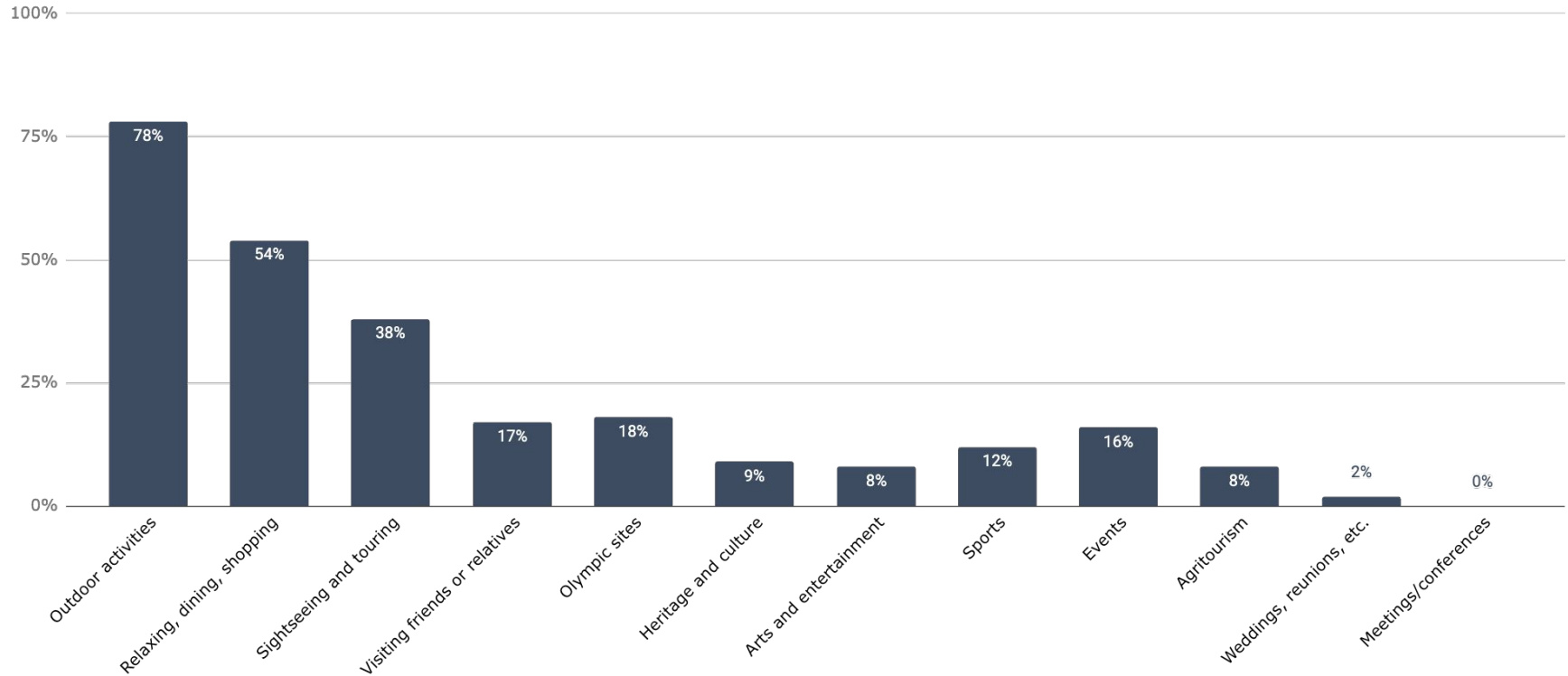
Five year key attractions - Hamilton County



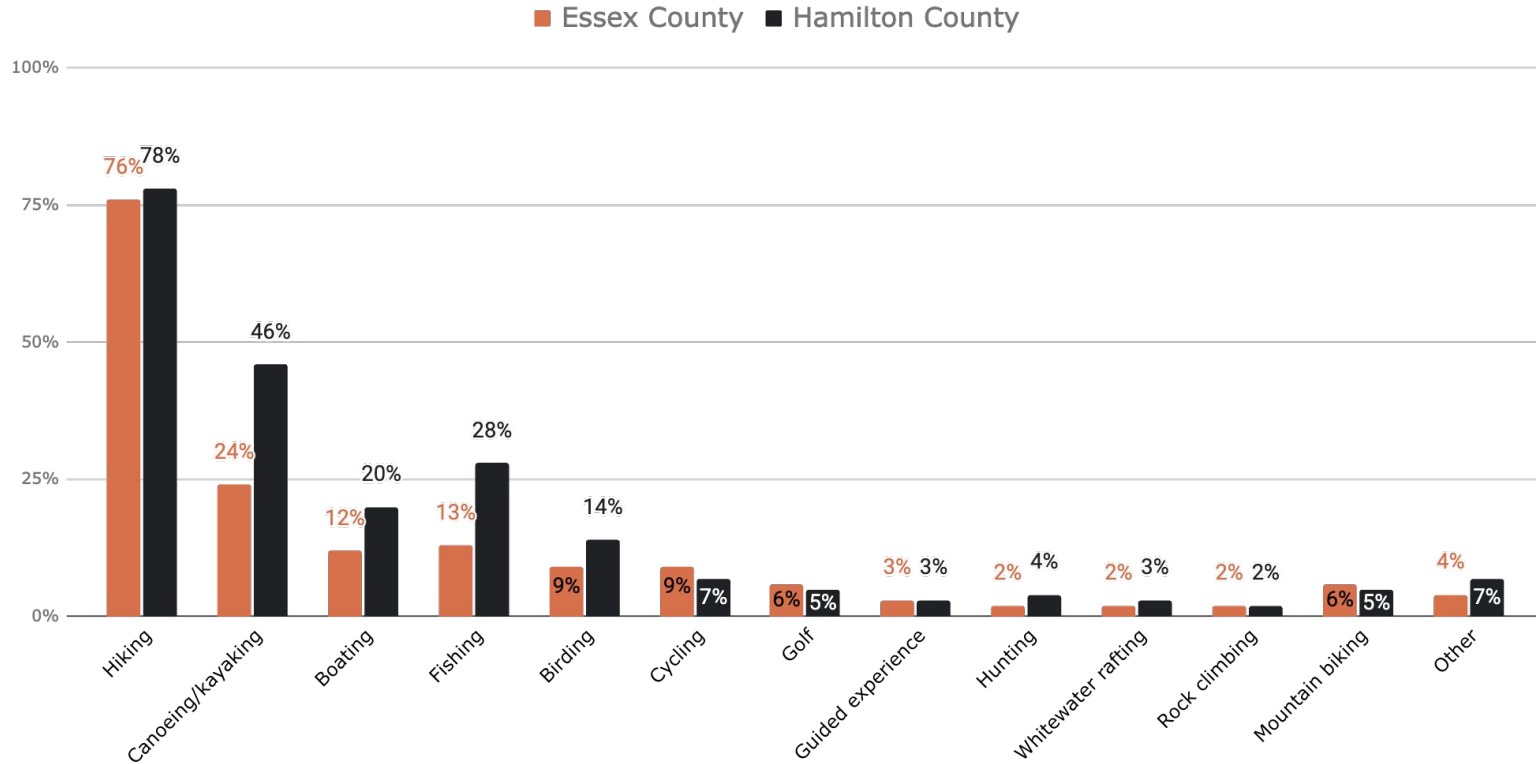
Key attractions - Day trippers



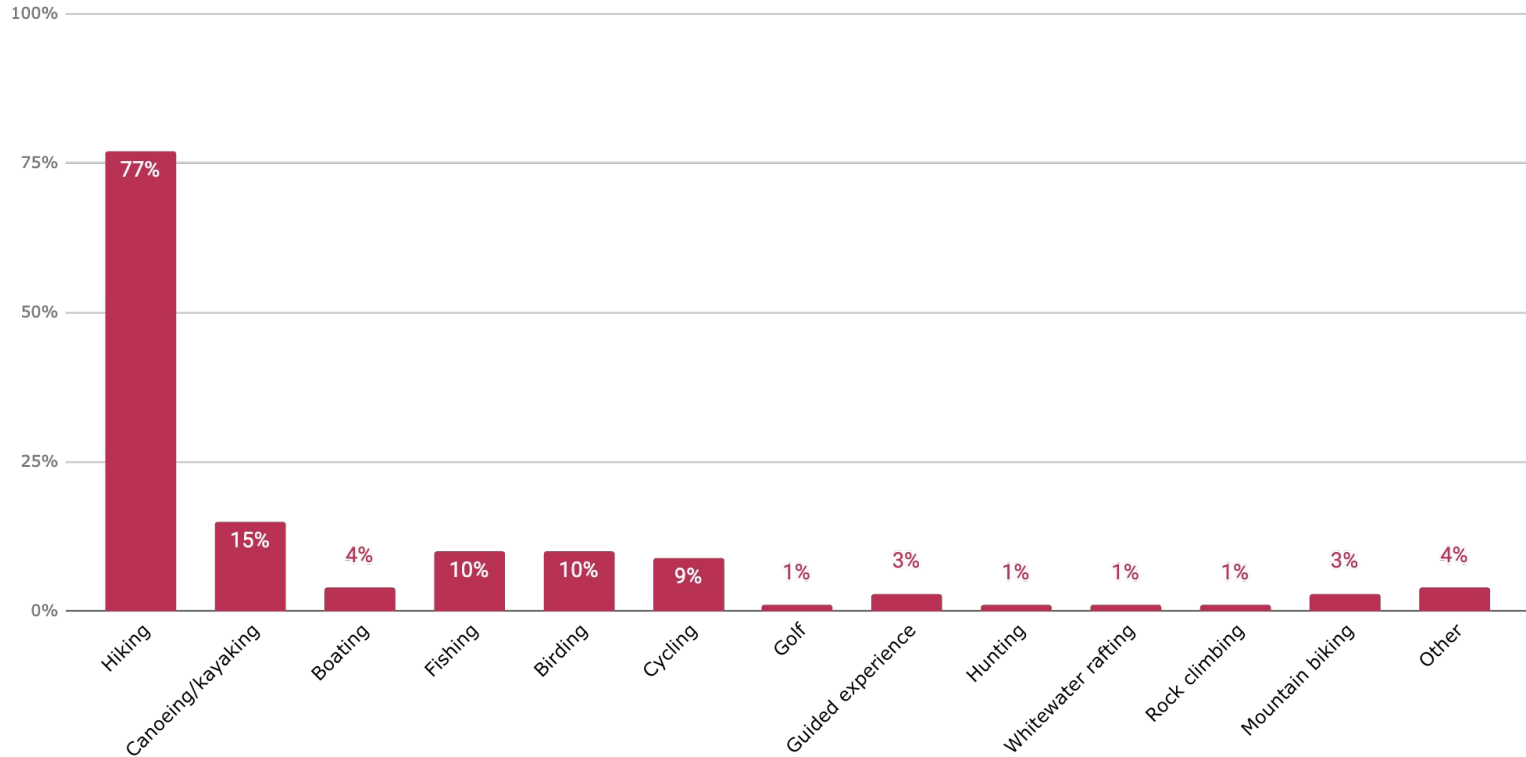
Key attractions - Short-term renters



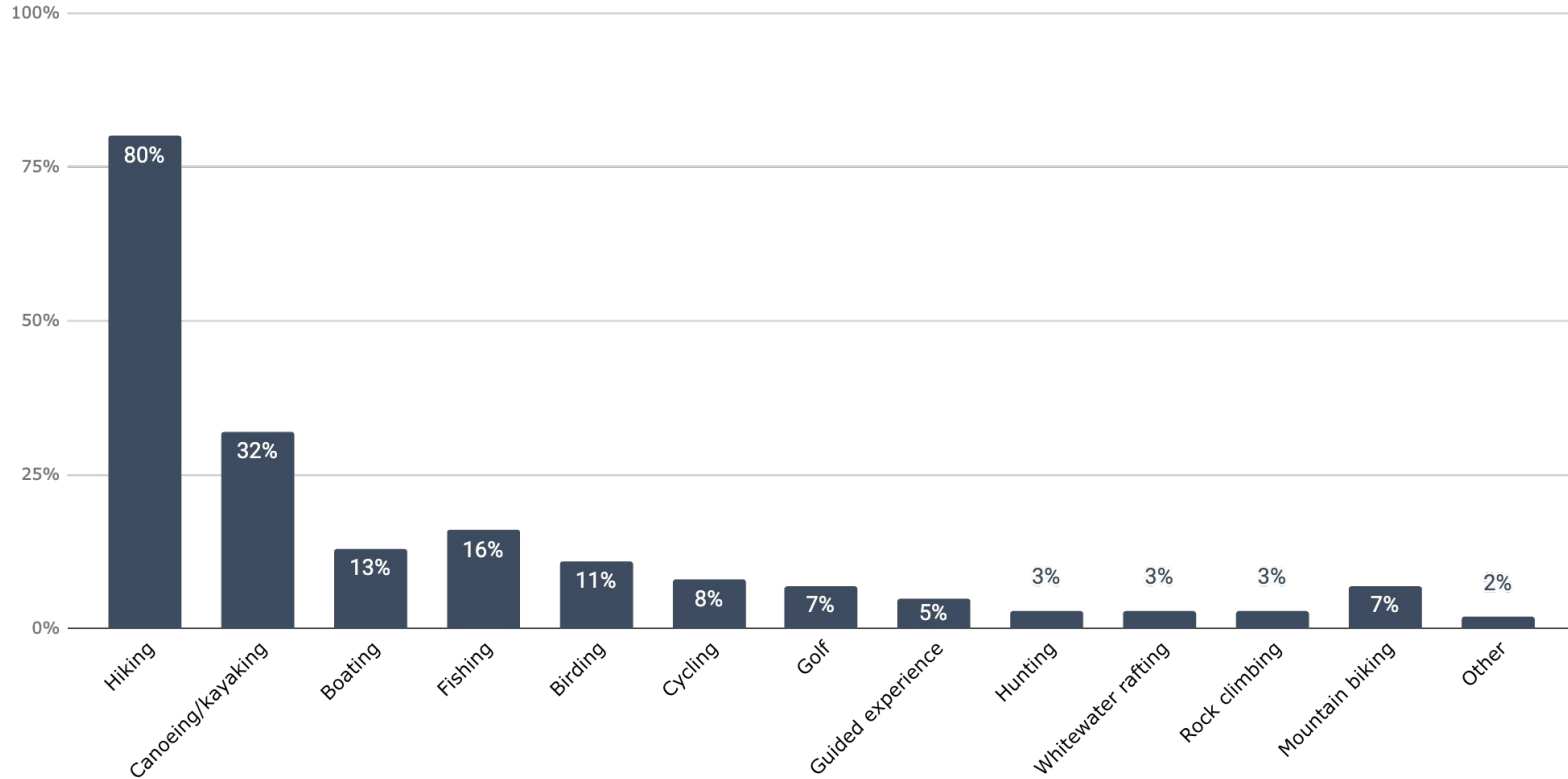
Outdoor Spring/Summer activities



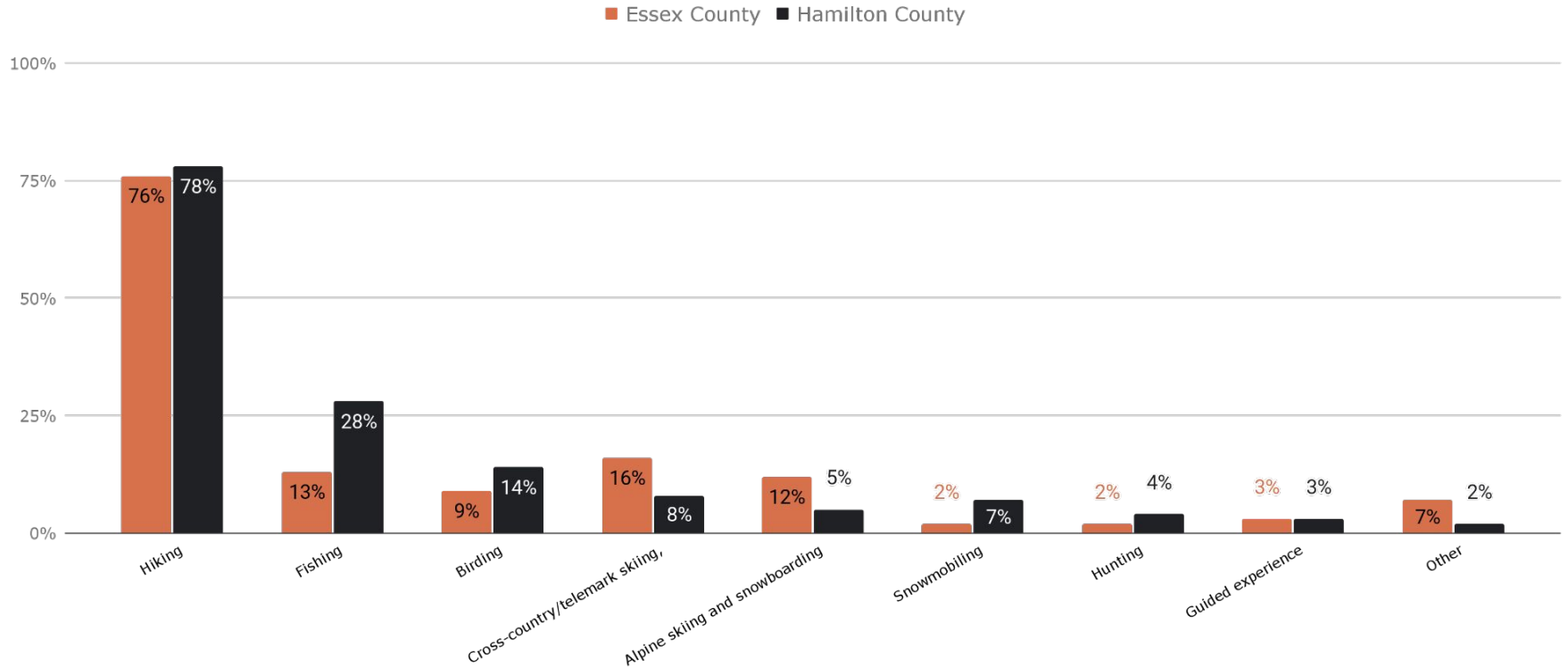
Outdoor Spring/Summer activities - Day trippers



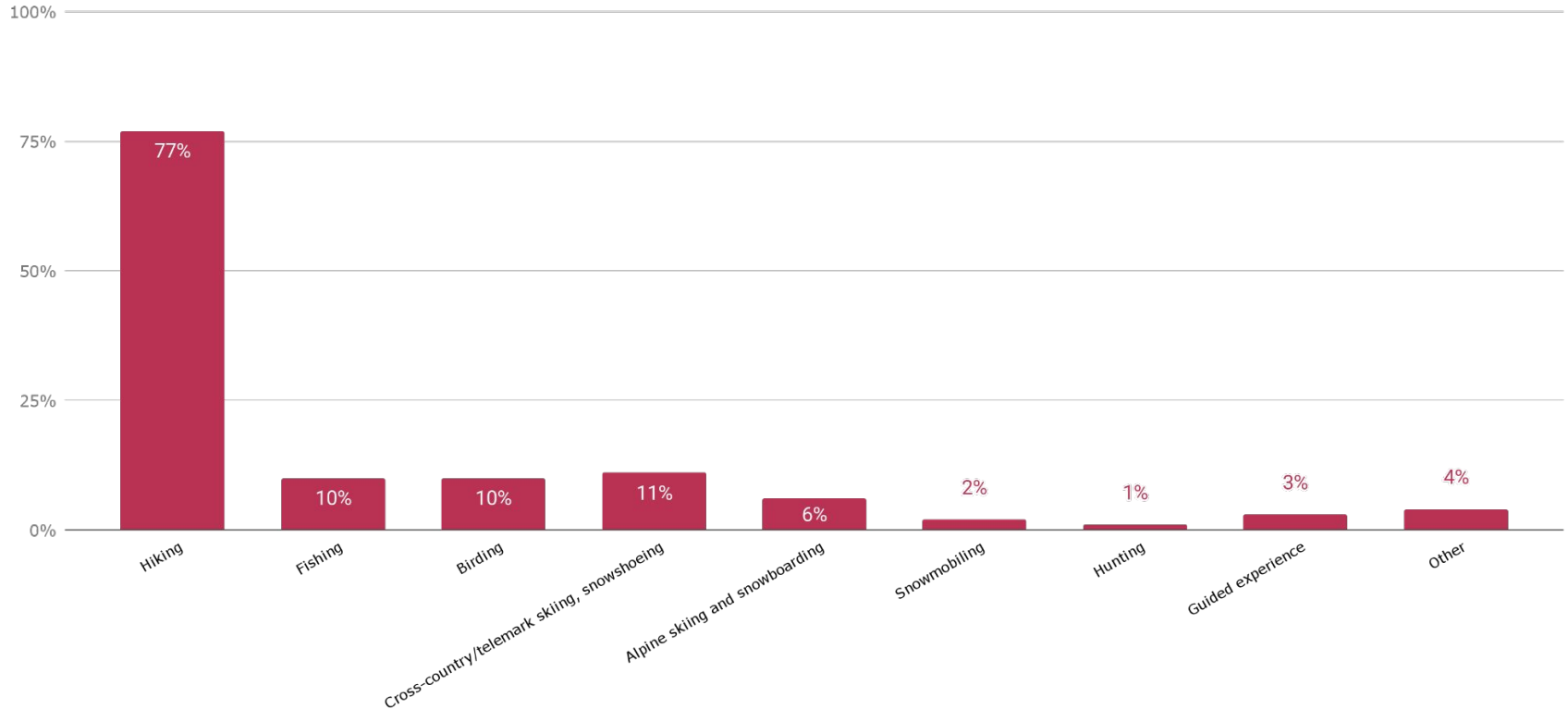
Outdoor Spring/Summer activities - Short-term renters



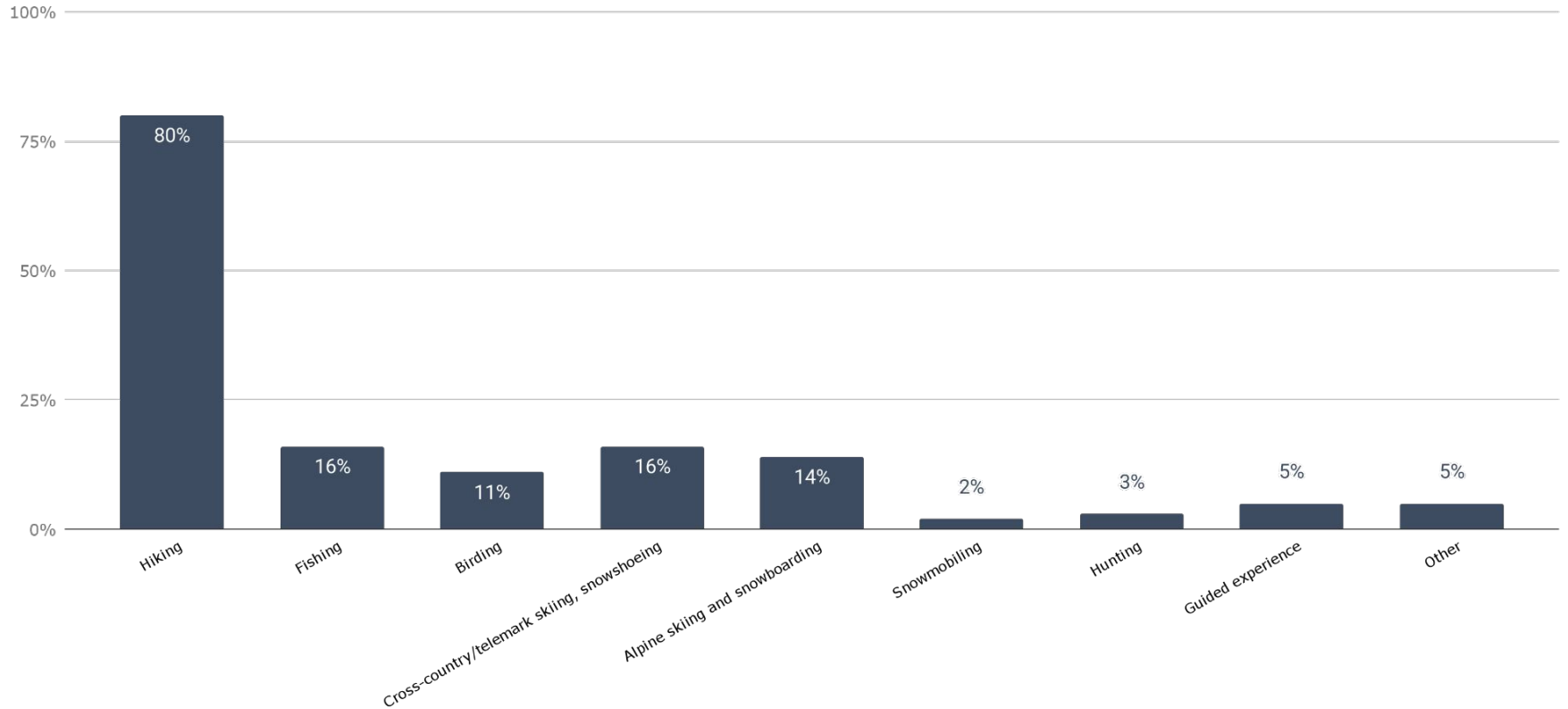
Outdoor Fall/Winter activities



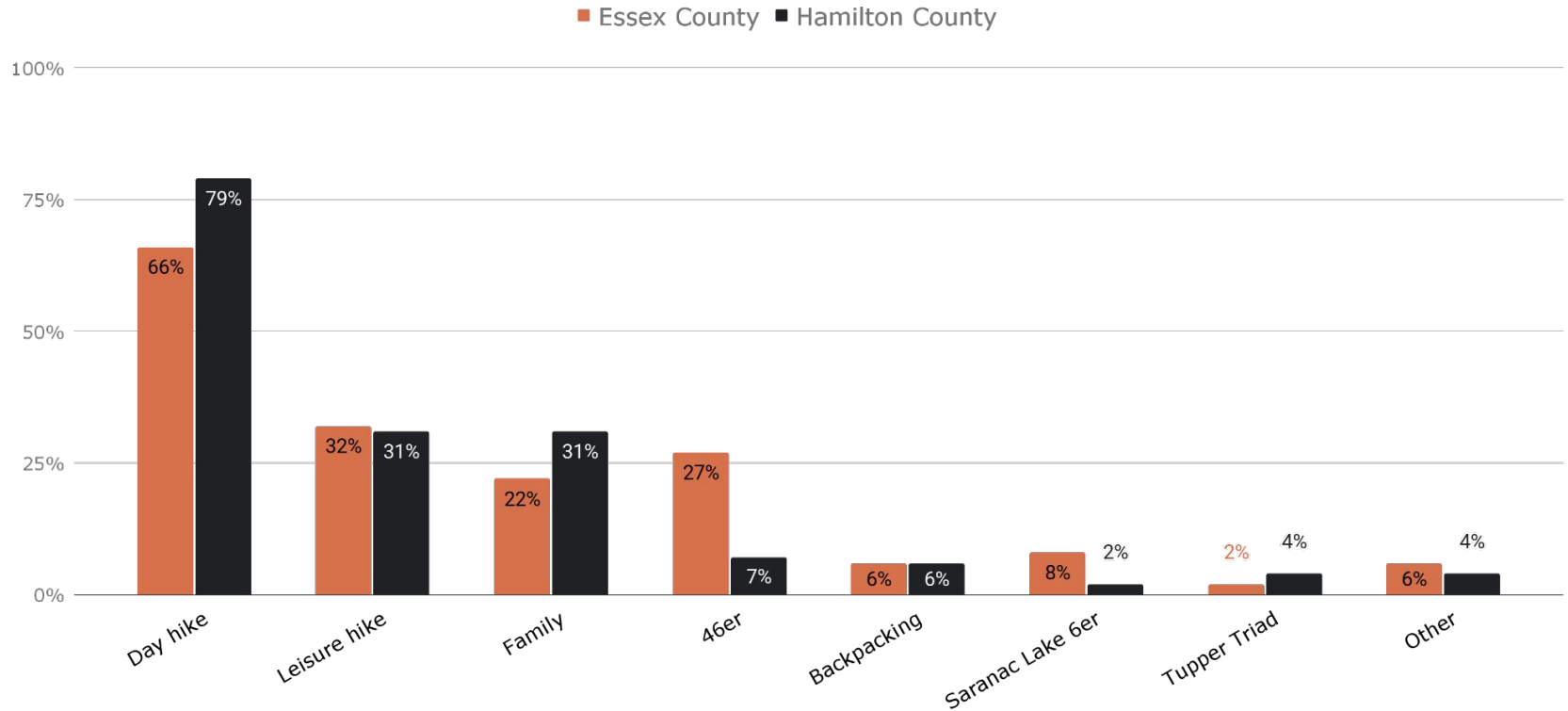
Outdoor Fall/Winter activities – Day trippers



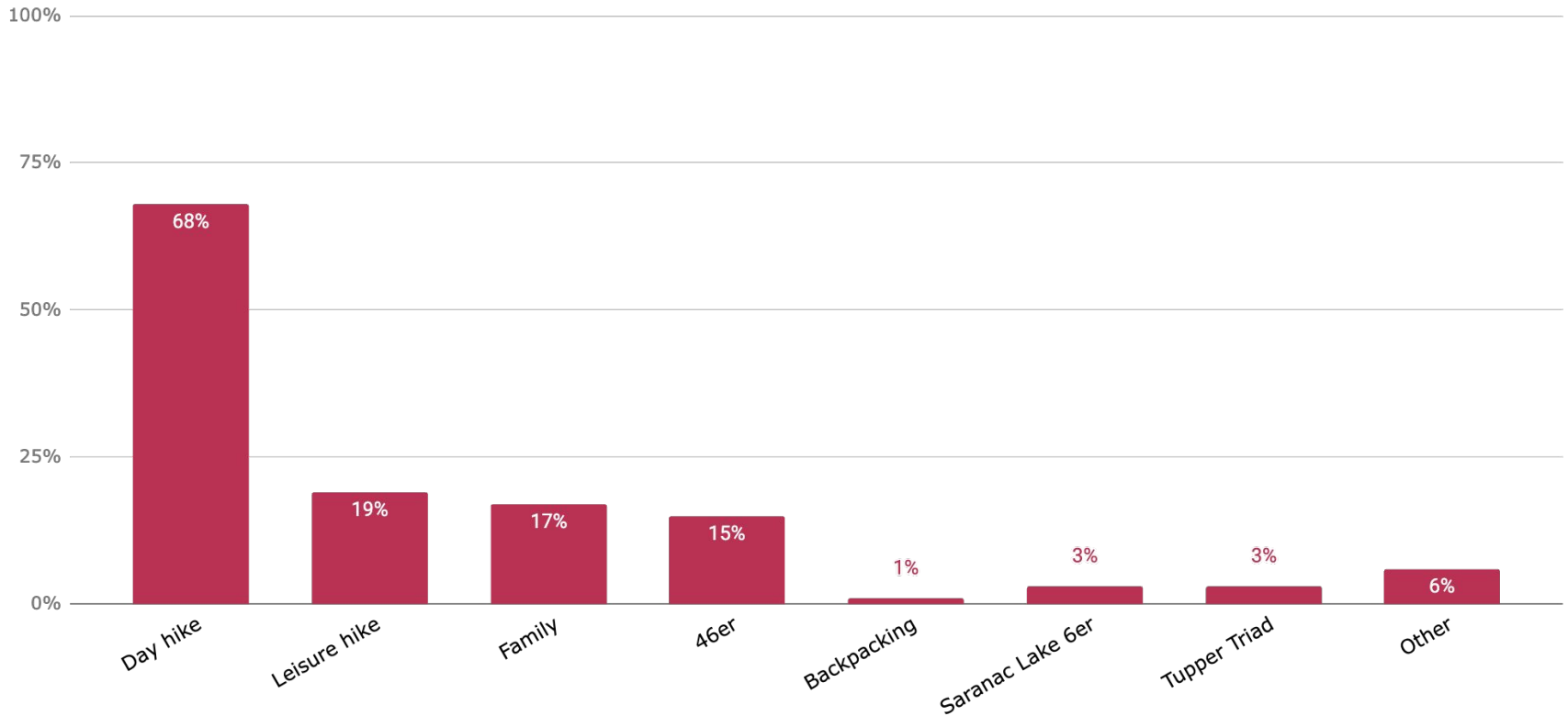
Outdoor Fall/Winter activities – Short-term renters



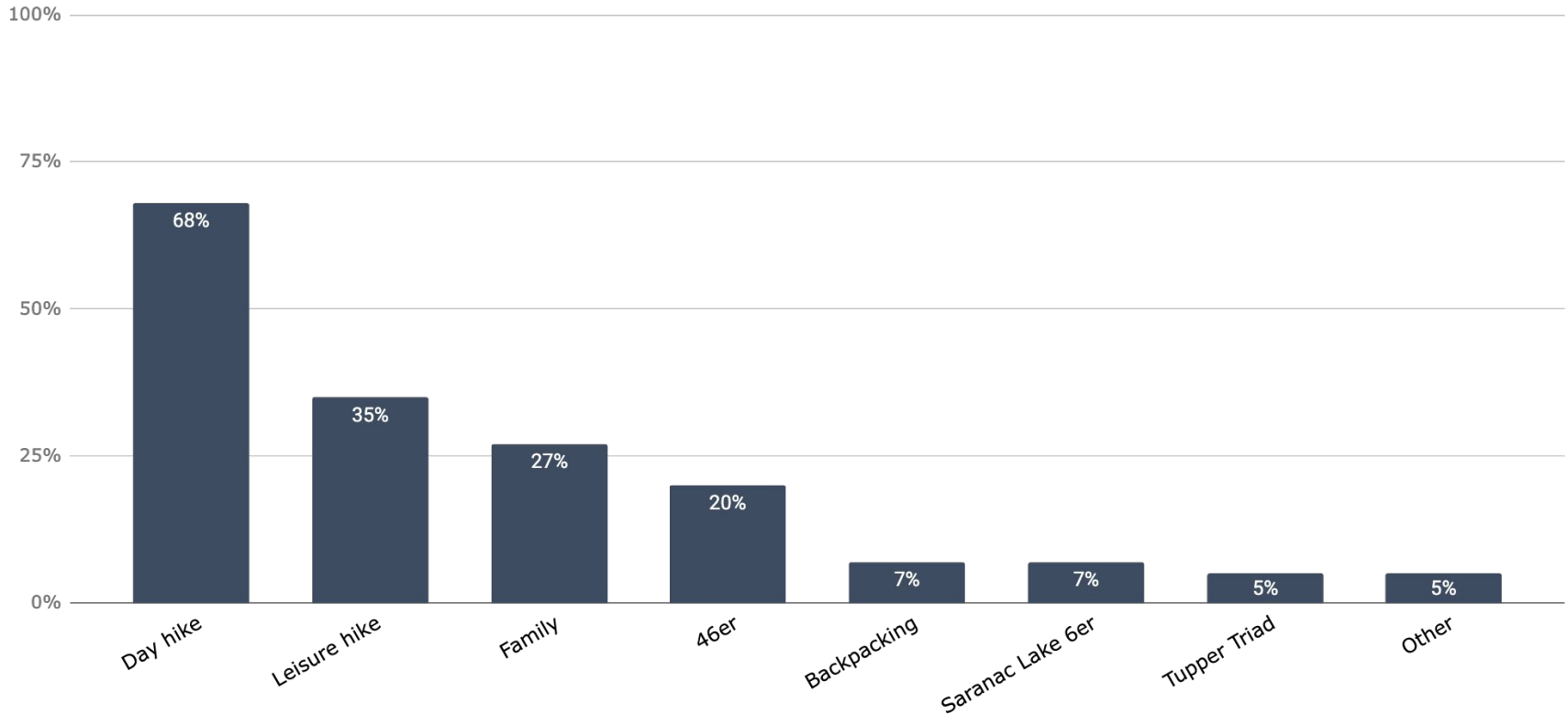
Hiking breakdown



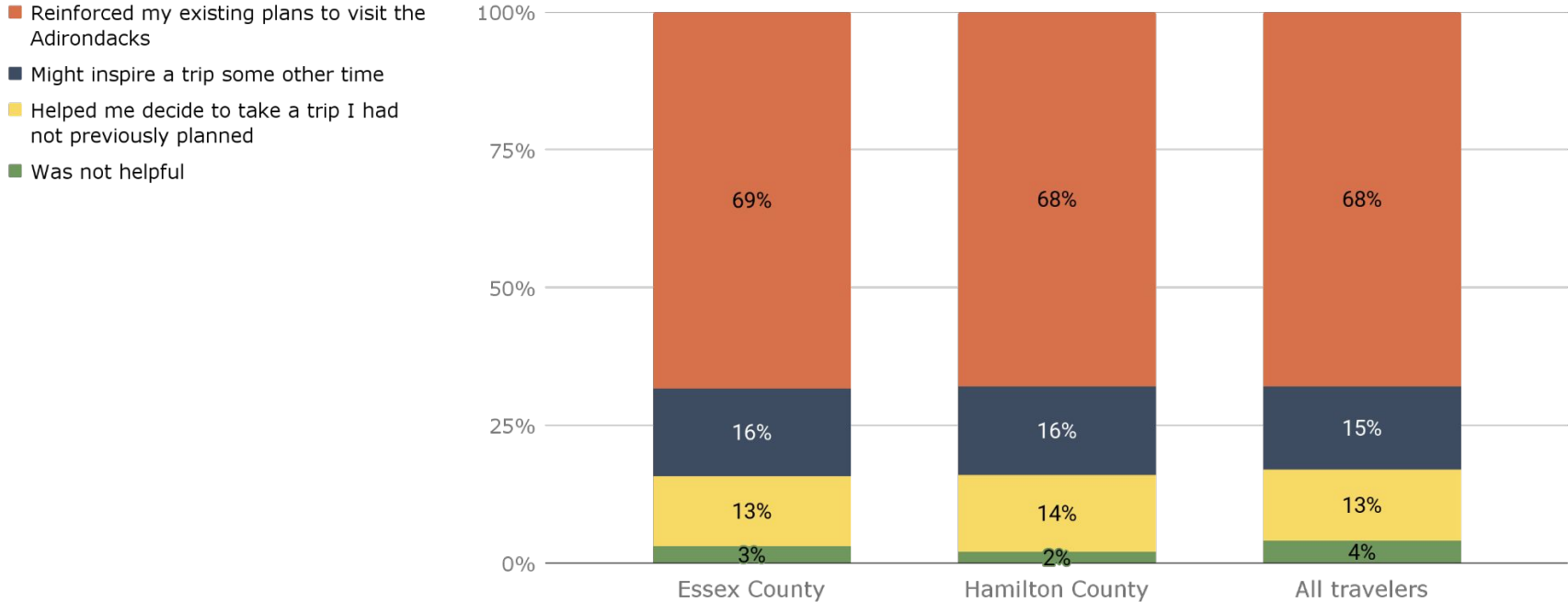
Hiking breakdown - Day trippers



Hiking breakdown - Short-term renters

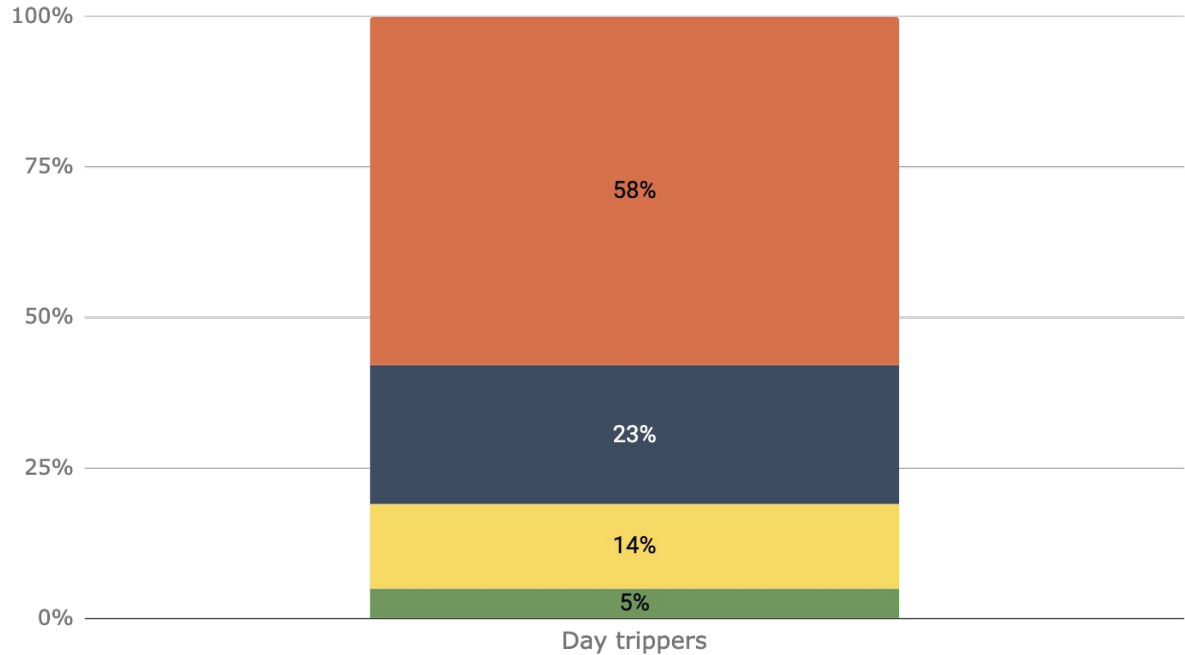


Conversion rate from viewing ROOST marketing materials - Essex and Hamilton counties

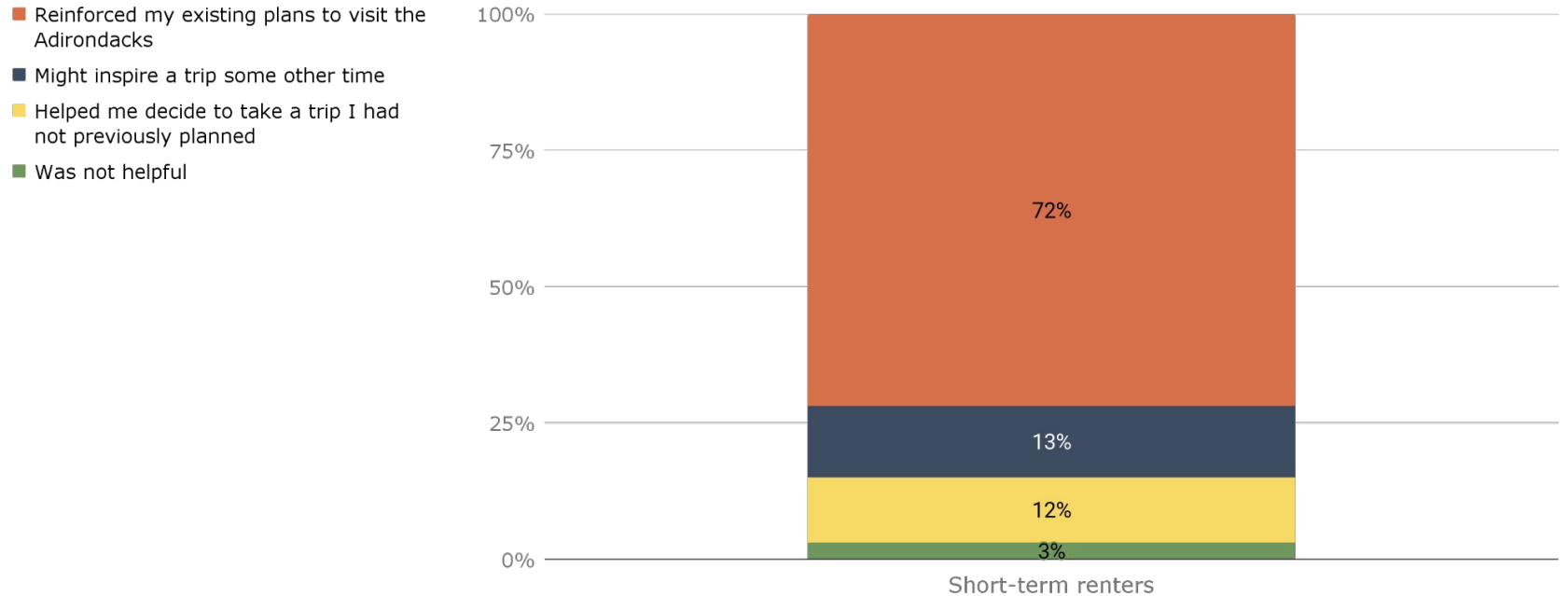


Conversion rate from viewing ROOST marketing materials - Day trippers

- Reinforced my existing plans to visit the Adirondacks
- Might inspire a trip some other time
- Helped me decide to take a trip I had not previously planned
- Was not helpful

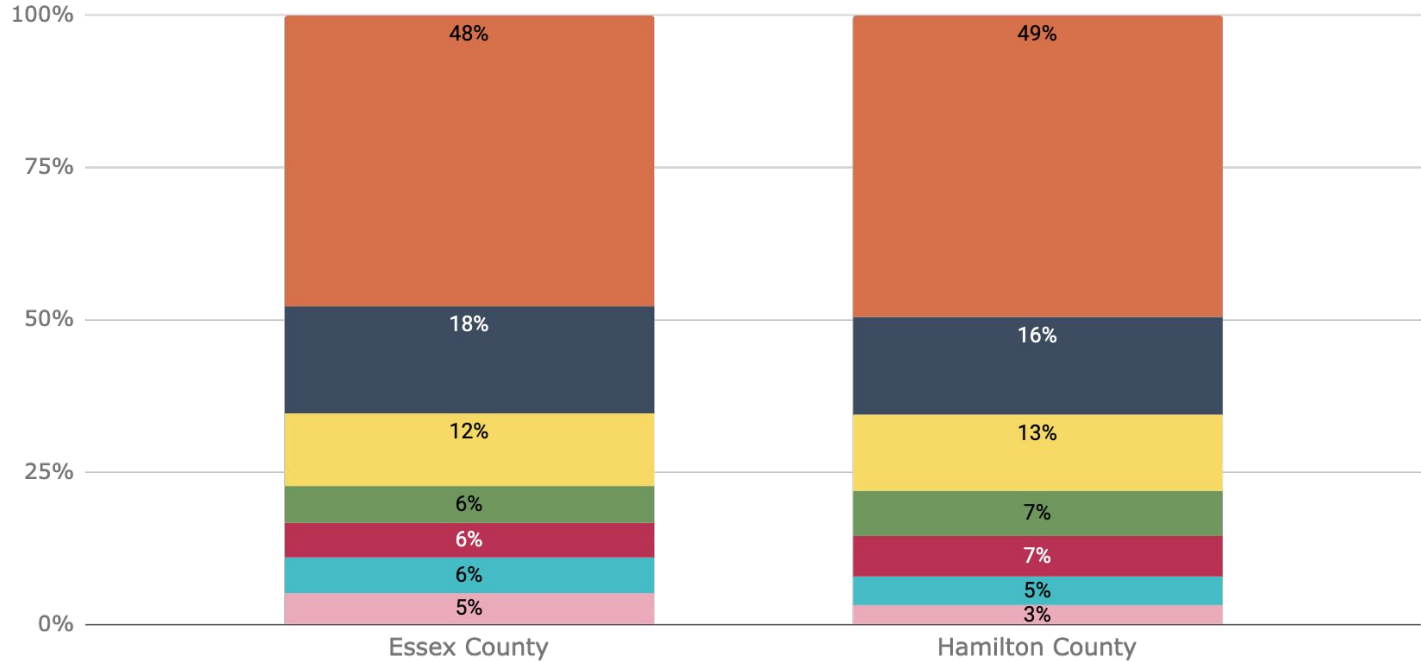


Conversion rate from viewing ROOST marketing materials - Short-term renters



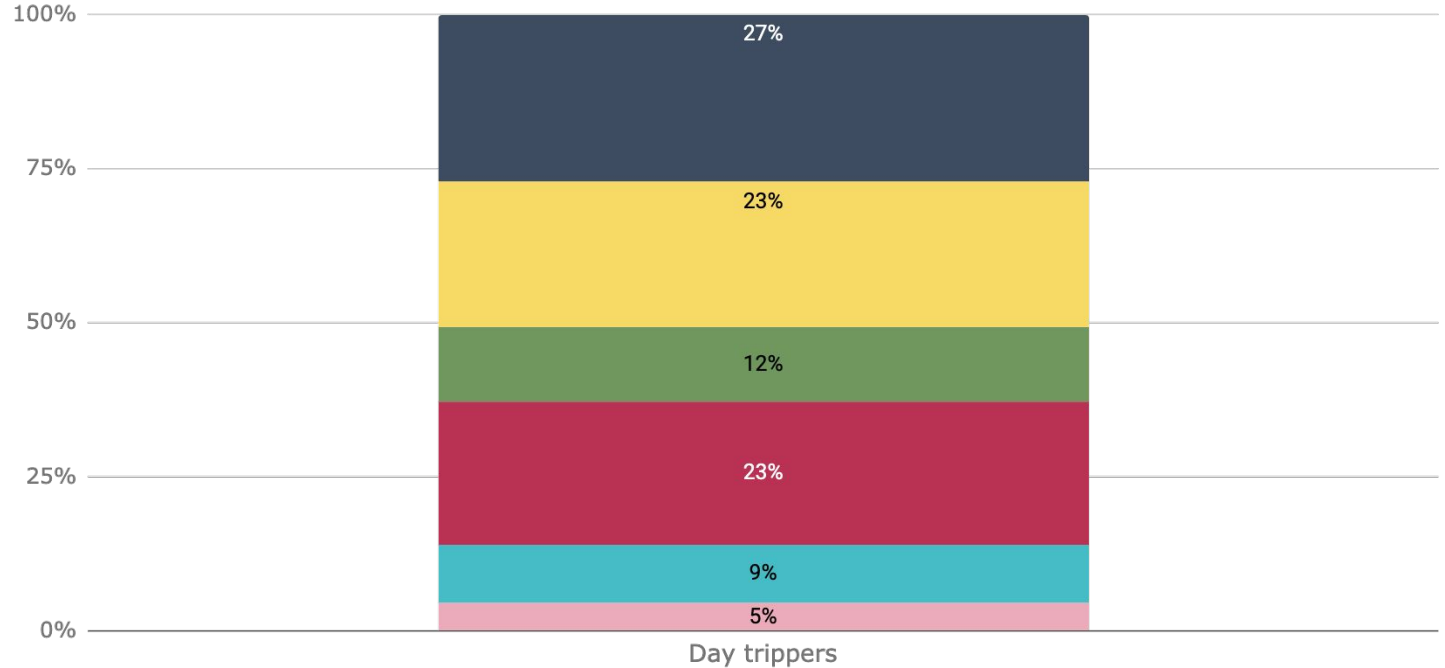
Total expenditure allocation by category - Essex and Hamilton counties

- Lodging
- Meals
- Shopping/retail
- Transportation
- Entertainment
- Attractions & events
- All other



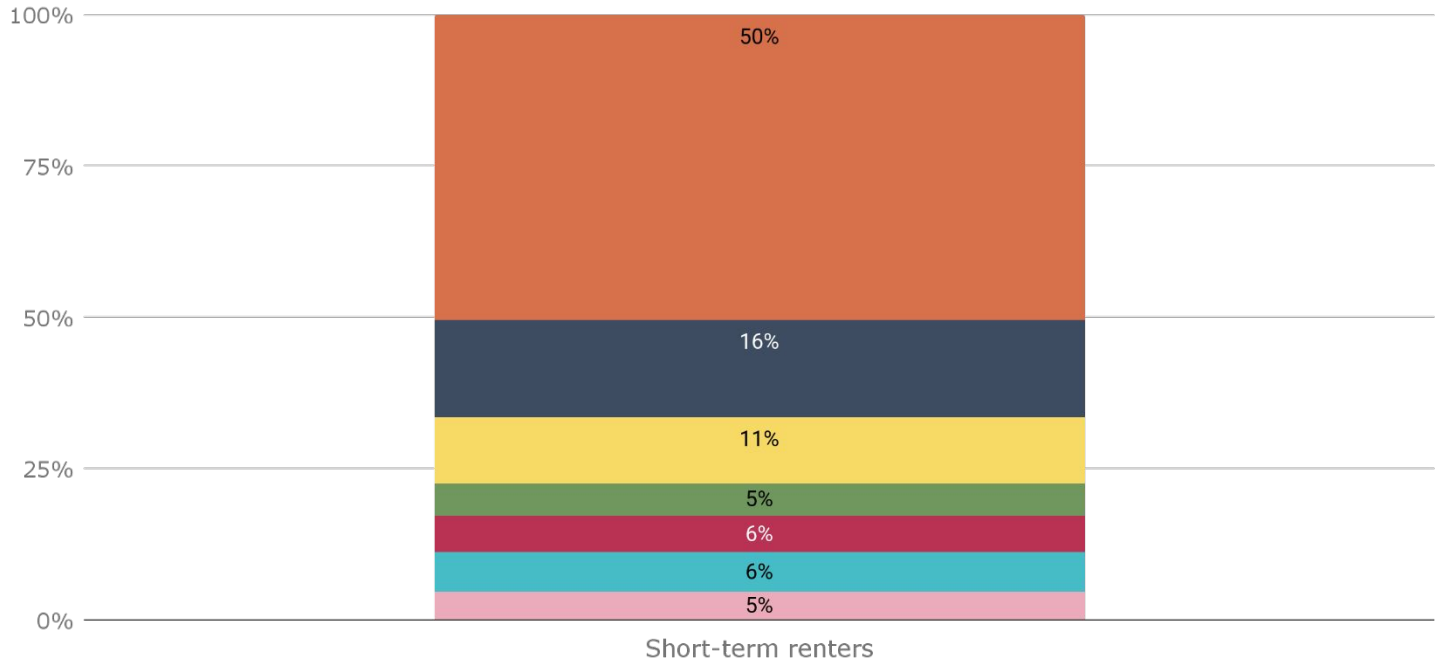
Total expenditure allocation by category – Day trippers

- Meals
- Shopping/retail
- Transportation
- Entertainment
- Attractions & events
- All other



Total expenditure allocation by category - Short-term renters

- Lodging
- Meals
- Shopping/retail
- Transportation
- Entertainment
- Attractions & events
- All other



Mean party expenditures

	Essex County	Hamilton County	All travelers
Lodging	\$895	\$787	\$868
Meals	\$331	\$254	\$308
Shopping/retail	\$225	\$200	\$228
Transportation	\$112	\$118	\$106
Entertainment	\$109	\$106	\$98
Attractions & events	\$108	\$75	\$112
All other	\$98	\$50	\$48
Average daily expenditure	\$536	\$429	\$491
Average total expenditure	\$1,878	\$1,590	\$1,768

Five year mean party expenditures – Essex County

	2019	2020	2021	2022	2023	Five year average
Lodging	\$499	\$910	\$679	\$950	\$895	\$787
Meals	\$245	\$449	\$287	\$311	\$331	\$325
Shopping/retail	\$200	\$274	\$215	\$220	\$225	\$227
Transportation	\$80	\$71	\$95	\$140	\$112	\$100
Entertainment	\$84	\$67	\$83	\$94	\$109	\$87
Attractions & events	\$84	\$57	\$83	\$100	\$108	\$86
All other	\$68	\$10	\$40	\$80	\$98	\$27
Average daily expenditure	\$419	\$283	\$464	\$512	\$536	\$443
Average total expenditure	\$1,265	\$1,838	\$1,482	\$1,895	\$1,768	\$1,650

Five year mean party expenditures - Hamilton County

	2019	2020	2021	2022	2023	Five year average
Lodging	\$390	\$527	\$527	\$667	\$787	\$580
Meals	\$200	\$312	\$221	\$253	\$254	\$248
Shopping/retail	\$146	\$184	\$174	\$210	\$200	\$183
Transportation	\$55	\$44	\$63	\$72	\$106	\$68
Entertainment	\$42	\$24	\$49	\$55	\$75	\$49
Attractions & events	\$53	\$63	\$86	\$120	\$118	\$88
All other	\$48	\$13	\$42	\$48	\$50	\$40
Average daily expenditure	\$306	\$167	\$314	\$375	\$429	\$318
Average total expenditure	\$934	\$1,167	\$1,162	\$1,425	\$1,590	\$1,256

Mean party expenditures - Day trippers

	Day trippers
Lodging	\$0
Meals	\$89
Shopping/retail	\$77
Transportation	\$40
Entertainment	\$76
Attractions & events	\$31
All other	\$15
Average daily expenditure	\$328
Average total expenditure	\$328

Mean party expenditures - Short-term renters

	Short-term renters
Lodging	\$1,420
Meals	\$451
Shopping/retail	\$308
Transportation	\$151
Entertainment	\$172
Attractions & events	\$182
All other	\$131
Average daily expenditure	\$626
Average total expenditure	\$2,815

A scenic landscape photograph of a lake at sunset. The foreground shows a calm lake reflecting the sky and the surrounding forest. The middle ground is a dense forest of trees, some with autumn foliage in shades of orange, red, and yellow. In the background, several mountain peaks are visible, with the central peak being the most prominent. The sky is a mix of soft orange, yellow, and blue, indicating the time is either dawn or dusk. A semi-transparent white rectangular box is overlaid across the middle of the image, containing the text "Essex County Visitor Profile" in a black, sans-serif font.

Essex County Visitor Profile

Visitor profile – Essex County

- The average visitor party age of respondents was 57 years old, slightly younger from the prior year (58).
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total average of 3.2. This is slightly lower than the reported party size in 2022 (3.1, including 2.6 adults and 0.7 child).
- Sixty-seven percent of visitors (67%) reported that they were New York state residents, which is equivalent to that reported in 2022.
- Northern New York and the Capital district continued to be the most frequently reported visitors from this group at 31%, followed by central/western New York visitors at 27%. Nine percent (9%) of visitors reported from downstate/NYC region in 2023. The proportion of Northeastern state visitors outside of New York state has grown over the last 5 years.

Visitor profile – Essex County

- The average duration of stay reported by 2023 travelers was 3.5 nights, which is slightly below the 5-year average (4 nights).
- Hotels/motels remained the most reported lodging choice among 2023 traveler respondents by a high margin (48%). There was a substantial jump from the year prior (43%).
- Short-term rentals were reported as the second most common lodging choice used by 18% of respondents. This figure dropped by 1% from the year prior, following many years of gains.
- The most-reported draw in visiting the region continued to be outdoor activities, with 62% of respondents selecting this attraction to visit the area. This declined somewhat from 2022 (73%).
- “Relaxing, dining, and shopping” remained the second-most expressed reason to visit the area, selected by 52% of respondents. Sightseeing (38%) and visiting friends (22%) rounded out the top four areas of expressed interest.

Visitor profile – Essex County

- Just over three out of four (76%) respondents who indicated 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 reported outdoor interest (24%), followed by cross-country skiing/snowshoeing (16%) and fishing (13%).
- Respondents were asked what types of arts activities were of interest. The strongest area of interest was live music, expressed by 67% of respondents. This was followed by visiting art galleries (42%) and live theater events (22%).
- Average daily traveler party spending in 2023 is estimated at \$536 per day. This is slightly higher than was reported from 2022 visitors (\$512).
- Total average estimated trip expenditure was \$1,878, nearly equal with 2022 estimated trip expenditure.
- Reported spending on lodging dropped somewhat from the record high of \$950 in 2022 to \$895. All other spending categories showed at least modest increases from the prior year, with only reported transportation spending declining substantially from 2022.

A scenic landscape photograph of a calm lake at sunset. The sky is a mix of soft orange, yellow, and pale blue. In the background, a range of mountains is visible, with the central peak being the most prominent. The slopes of the mountains are covered in dense forests, many of which are displaying vibrant autumn colors in shades of red, orange, and yellow. The foreground shows a dense forest of evergreen and deciduous trees along the shoreline. The water of the lake is very still, acting as a perfect mirror for the sky, mountains, and trees above. The overall mood is peaceful and serene.

Hamilton County Visitor Profile

Visitor profile – Hamilton County

- Average traveler party age of respondents was 59 years old, consistent with recent years.
- The average reported total traveler party size dropped for the second year among 2023 visitor respondents, to 2.7 adults and 0.8 child, or 3.5 overall.
- Visitation by respondents from within New York state stayed consistent with the last several years at 81% of respondents. Almost half (45%) reported coming from central or western New York. Twenty-seven percent (27%) reported coming from the Capital District or North Country. Six percent of respondents reported coming from the downstate/NYC region.
- Northeastern state visitors from outside of New York rose slightly from 12% in 2022 to 14% in 2023. Reported visitation from other U.S. regions than the Northeast was 5%.

Visitor profile – Hamilton County

- Average stay length reported by 2023 travelers is 3.7 which is lower than the five-year average of 4.2.
- Camping/RV continued to be the most commonly reported lodging choice among 2023 traveler respondents at 25%, followed by hotels/motels at 21%. Both of these most commonly selected lodging options dropped 1% from the year prior. Second home use and short-term rentals are equally reported at 17%, climbing slightly in proportion during the last two years. Staying with family and friends stayed consistent at 17% of reported visits in 2023.
- The most popular reported attraction to visit the region continued to be outdoor activities, with 66% of respondents selecting this response. This is a slightly lower figure than expressed by 2022 respondents (which was 69%).
- “Relaxing, dining, and shopping” remained the second-most expressed reason to visit the area by 51% of respondents. Sightseeing (43%) and visiting friends (27%) rounded out the top four areas of interest consistent with past data.

Visitor profile – Hamilton County

- More than three out of four (78%) 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-commonly reported outdoor interest (46%), followed by fishing (28%) and boating (20%).
- Reported interest in fishing grew from 10% in the prior year to 12% in 2023. Reported interest in cross-country skiing/snowshoeing grew from 4% to 8%. Fourteen percent (14%) of respondents expressed an interest in birding; this has remained a strong area of interest with steady growth during the last decade.
- Respondents were asked what types of arts activities were of interest. The most popular response was live music at 56%, followed by live theater at 41%. The Adirondack Watercolor event was noted as an attraction by 24% of respondents. Studio visits, gallery visits and art instruction each were selected by 14% of these respondents.

Visitor profile – Hamilton County

- The average daily traveler party spending in 2023 increased to \$429, which is a 14% increase from the year prior. The total estimated average trip expenditure for 2023 visitors is \$1,590, 11% higher from the prior year. It is notable that this is the second year of “double digit” growth in estimated visitor spending.
- Reported spending on lodging in 2023 was \$787 per stay. It is more than \$100 higher than the prior year (\$667).
- Reported expenditure on meals (\$254) and shopping (\$200) both stayed relatively consistent with the prior year data. Reported expenditure on entertainment (\$106) and attractions/events (\$75) showed strong growth from that of the year prior.
- Daily expenditure levels, particularly in key areas of lodging and meals have been on a steady growth trend even before the recent two years of inflation. This is a strong point for creating significant regional economic impact.
- The average income of visitors has grown steadily during this research, providing justification for the higher expenditures and continued capacity for continued growth.



Day Tripper Visitor Profile

Visitor profile – Day trippers

- Daytrip respondents comprised approximately 15% of the survey respondents, representing a slight downward trend in the proportion of day visitors of the total regional respondents (16% in 2022, 17% in 2021, 26% in 2020, and 34% in 2019).
- Average day trip visitor party size is 2.7 persons, including 2.2 adults and 0.5 child. This is slightly lower than last year's reported visitor party size (2.8 persons in 2022).
- Overall visit expenditures continue to be lower among day-trip visitors. The total average reported party expenditure for day travel is \$328 compared to \$491 daily expenditures by all visitors. The daily reported spending by day-trip visitors increased over last year reported levels by 25%.
- Meals comprise the largest category of expenditures at \$89, an increase from 2022 (\$73). Shopping (\$77) and entertainment (\$76) comprise the next categories of major reported expenditures. Reported shopping levels declined somewhat from 2022 while reported entertainment spending more than doubled.

Visitor profile – Day trippers

- Outdoor activities are the strongest reported draws to visit the region by day trippers (48%), followed closely by sightseeing (44%), and relaxing, shopping, and dining (41%).
- Hiking was the most popular activity among day trippers who responded that they were interested in outdoor activities, selected by 77% of respondents. Interest in canoeing/kayaking was selected by 15% of respondents, fishing by 10% of respondents, birding by 10% of respondents, cycling by 9% of respondents, and skiing/boarding by 6% of respondents.
- Day trippers (at 60 years old) continue to report a slightly higher average age compared to all visitor groups.



Short-Term Renter Visitor Profile

Visitor profile – Short-term renters

- About 15% of the full visitor group indicated that they stayed in a short-term rental. This proportion has decreased slightly over the past six years.
- Average short-term renter traveler party size is 4.1 persons (3.2 adults and 0.9 children) versus 3.2 for all visitors to the region. Party size has declined for this group in the last five years of data collection.
- Total expenditures reported among short-term renters was an average of \$2,815. This is well above the average regional visitor reported expenditures of \$1,768 per trip. The total expenditures declined in this group from the prior year.
- Lodging costs accounted for most of this reported expenditure at \$1,420. Reported average meals were \$451. Both lodging and meal expenditure dropped among this group from 2022. Average expenditure in shopping, entertainment, and attractions/events all showed slight growth from the year prior. All average expenditure categories reported by short-term renters are higher than averages reported by all regional visitors.

Visitor profile – Short-term renters

- The reported average length of stay for short-term renters is 4.5 nights, declining from 2022 (5 nights). Short-term renter stays remain longer, on average, than those of all visitors (3.6 nights in 2023).
- Outdoor activities (78%), relaxing/dining (54%) and sightseeing (38%) were the highest levels of reported interest to visit the area among short-term renters. This is consistent with the three most common activities reported by all visitors. Visiting Olympic sites (18%), visiting family and friends (17%), and events (16%) are the next most selected attractions by short-term renters.
- Hiking (80%) and canoeing/kayaking (32%) are the most reported outdoor attractions by short-term renters. These figures are higher proportions than expressed among the full regional group. Fishing (16%) and cross-country skiing/snowshoeing (16%) are the next-most selected outdoor attractions by short-term renters.
- While the vast majority of short-term renters indicate that they are white/Caucasian, it is notable that there is a greater racial/ethnic diversity among this group than the full respondent pool. Eight percent (8%) of short-term rental respondents indicate that they are non-white, compared to 5% survey-wide.
- The mean age of short-term renters is slightly younger than the full regional group at 57 years (versus 58).



Regional Visitor Impacts

Regional visitor impacts - All travelers

- Average traveler party age of respondents was 58 years old, fairly consistent with the five-year average.
- The average reported total traveler party size was 2.6 adults and 0.6 child, for a total of 3.2 persons. This result shows a three-year trend of slightly smaller average party sizes.
- Reported visitation by respondents from New York state rose slightly from prior year to 70% of visits.
- Visitors traveling from central/western New York comprised the largest group of these respondents at 32%, followed by northern New York visitors at 30% of visits, and just under 10% of visitors reporting from downstate New York.
- Northeastern state visitors outside of New York state were consistent from the last two years at 18% of respondents. Seven percent of visitors reported visiting from states outside the Northeast (with the highest proportion (4%) of those from southern U.S. states.
- Canadian visitation climbed slightly from recent years, with 3% of visitors reporting from Quebec and 2% from Ontario.

Regional visitor impacts – All travelers

- Stay length reported by 2023 travelers dropped very slightly from that reported in 2022, to 3.6 nights. This is close to the five-year average duration of stay of 4.1 nights.
- Hotels/motels remained the most frequently reported lodging choice among 2023 traveler respondents (42%), with a growth in reported popularity in comparison to the last several years (where it ranged between 38-40%).
- Reported stays in short-term rental lodging dropped very slightly to 17% (from 18% in the prior year). Fifteen percent (15%) of respondents reported staying with family and friends, 12% reported camping (RV/tents), 11% reported staying in second homes and 3% at bed and breakfasts. These were only slightly different in proportion than reported accommodations in recent years.
- The highest ranking attraction to visit the region continued to be outdoor activities, with 65% of respondents selecting that this was a draw to visit.
- “Relaxing, dining, and shopping” remained another frequently expressed reason to visit the area by 53% of respondents. Sightseeing (40%) and visiting friends (25%) rounded out the top four areas of interest.

Regional visitor impacts – All travelers

- One out of four respondents (25%) reported visiting family and friends as a draw to visitation, consistent with long-term data.
- More than three out of four (77%) of 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 (29%), followed by fishing (17%), boating (14%), and cross-country skiing/snowshoeing (14%). Increases in reported popularity of fishing and cross-country skiing/snowshoeing are notable.
- Respondents were asked what types of arts activities were of interest. The strongest response to this question was live music at 63%. Art galleries represented a strong attraction as well, selected by 43% of respondents. Live theater was a noted attraction to 20% of these respondents.
- Expenditure levels reported by 2023 visitors continued to climb to the highest levels reported in this data collection. The average daily traveler party spending in 2023 was estimated at \$491.
- Total estimated reported trip expenditure was \$1,768 which is slightly higher than reported from the prior year.

Regional visitor impacts - All travelers

- Reported spending on lodging (\$868) climbed 10% from the reported 2022 visitation levels, for three years of “double digit” increases. Reported meal spending climbed slightly from the prior year to \$308.
- Other expenditures categories demonstrated increases as well, except transportation, which declined slightly. This results in a robust total expenditure profile which includes shopping (\$228), entertainment (\$106), transportation (\$112), and attraction/events (\$98). Transportation costs have fallen across profiles in this year, very likely due in part to lower gasoline prices.
- Most expenditure categories reported all-time highs. Reported lodging expenditures continued to make dramatic increases from the prior year and over previous years. These increased levels have the added benefit of improving the occupancy tax revenues that the region can employ to further improve marketing and attraction efforts.
- Daily expenditure levels have been on a steady growth trend even before the last two years of inflation. This is a strong precedent for continued regional economic impact.



Regional ROI Study

Return on investment (ROI) – All travelers

The estimated total revenue generated by leisure travelers to the region who were influenced by ROOST marketing materials is calculated by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures, and length of stay:

$$\begin{aligned} &228,324 \text{ (direct leads)} \\ &\times 82\% \text{ (gross conversion factor)} \\ &\times \$491 \text{ (mean traveler party expenditure per day)} \\ &\times 3.6 \text{ (mean length of stay in nights)} \end{aligned}$$

Based on these calculations the total estimated revenue generated by travelers influenced by ROOST in 2023 is **\$330,940,112.**

Return on investment (ROI) - All travelers

The estimated return on investment is calculated by dividing the total revenue generated by travelers by the total marketing dollars spent by ROOST:

$$\begin{aligned} & \$330,940,112 \text{ (total estimated traveler revenue)} \\ & \div \$3,886,747 \text{ (total ROOST marketing expenditures)} \end{aligned}$$

This produces a conservatively-estimated ROI of 91:1 in leisure traveler-related revenue for every marketing dollar expended.