



**Tourism Committee  
AGENDA  
May 21, 2025**

Committee Members: RUNYON, Geraci, Strainer, Crocitto, Turner, Strough, Merlino

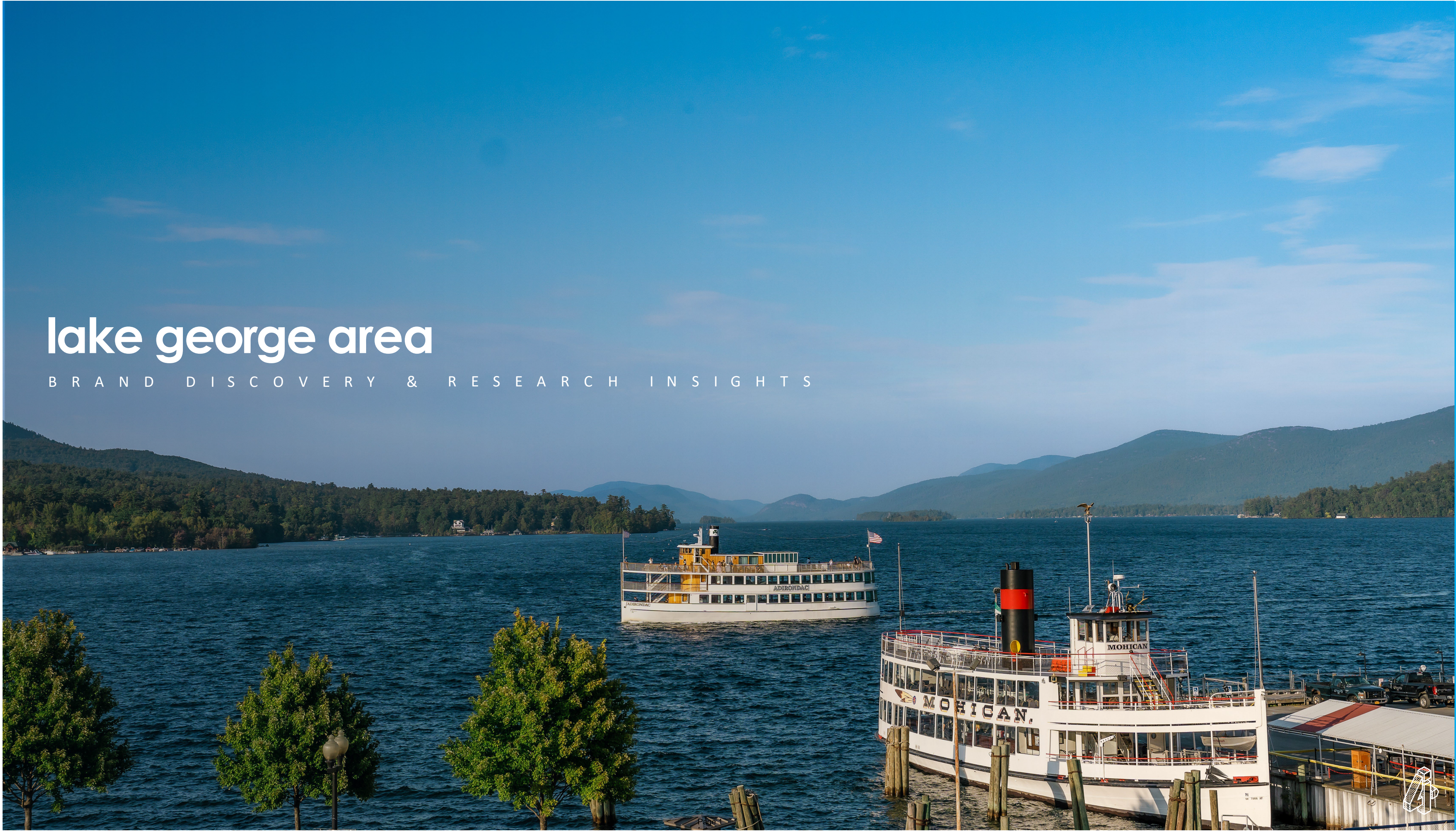
*Chair of the Board shall serve as an Ex-Officio member when needed in accordance with Section C (4) of the Rules of the Board.*

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- I. Committee meeting called to order by Chairwoman Runyon.
  - II. Motion to approve minutes of the April 21, 2025 Tourism Committee meeting.
  - III. Privilege of the floor and public comment:
  - IV. Action Agenda/New Business Items: None
  - V. Discussion Items:
    - a. Tourism Director Report
  - VI. Referrals: None
  - VII. Privilege of the floor and public comment
  - VIII. Motion to adjourn
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# lake george area

B R A N D   D I S C O V E R Y   &   R E S E A R C H   I N S I G H T S

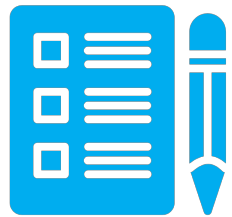


# This readout was informed by:



## Discussion groups

- 14 participants
- Hospitality and attraction partners
- Local marketing professionals
- Board & regional leadership



## Email survey to recent visitors

- 417 respondents



## Data & reports

- STR 2023
- Hunden Competitive Analysis (May 2022)
- DOMO + rove (2023 & 24)
- Tourism Economics report:  
Impact of visitors to the Adirondacks report (2023 data)
- 2021 Visitor Intent Survey
- Travel Guide request data

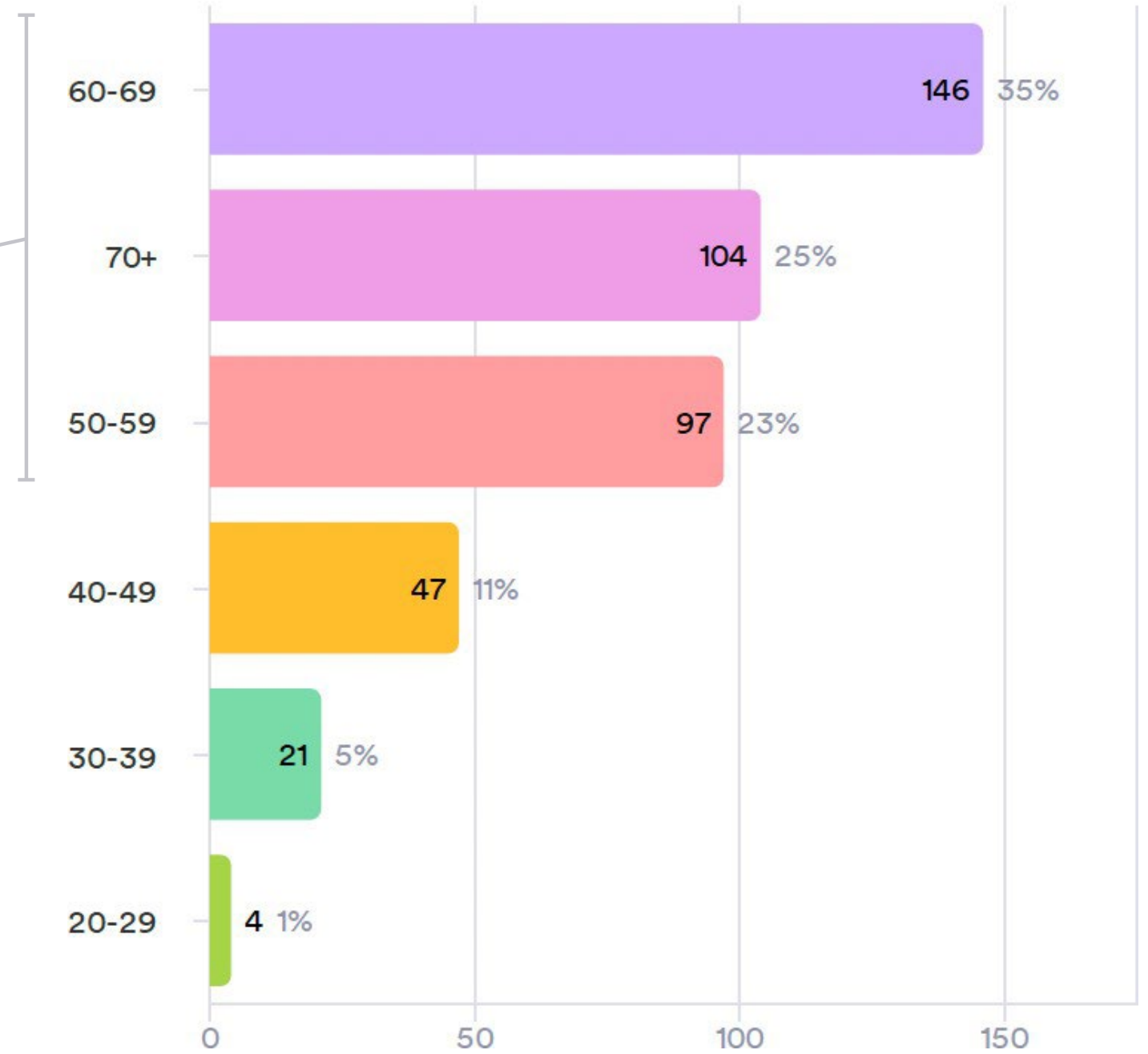


## Visitors skewed older.

- 83% were aged 50 or above
- The 2021 visitor intent survey mirrored these results.

### What is your age?

419 Responses- 6 Empty



\* SOURCE : VISITOR SURVEY



# Household incomes were broad.

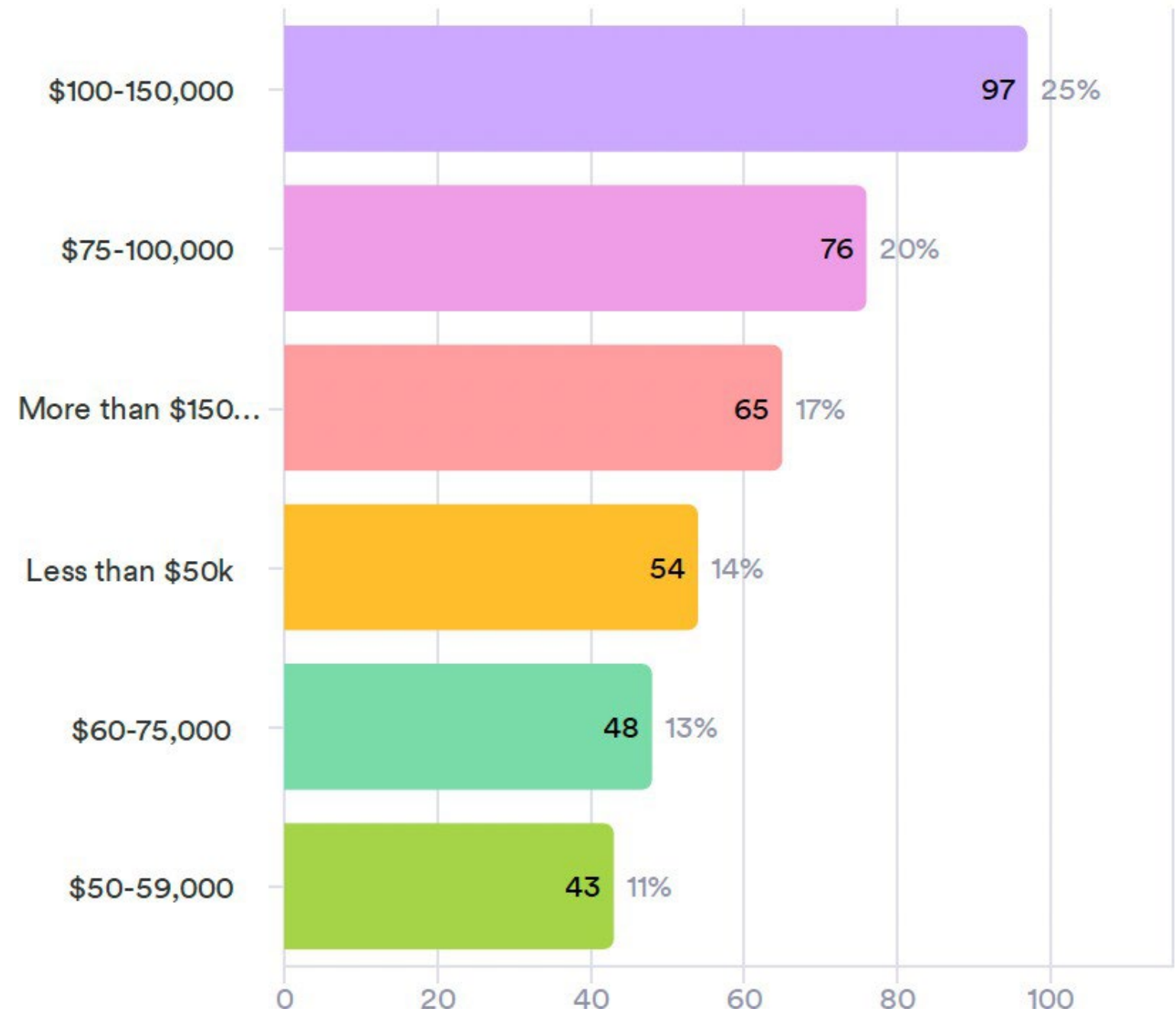
- 42% \$100,000 or more
- 44% \$50-100,000
- 14% less than \$50,000

“Some people can only afford to be in a tent or they can afford to stay in a castle. So we have a very diverse clientele.”

\* S O U R C E : F O C U S G R O U P S

## What is you household income?

383 Responses- 42 Empty



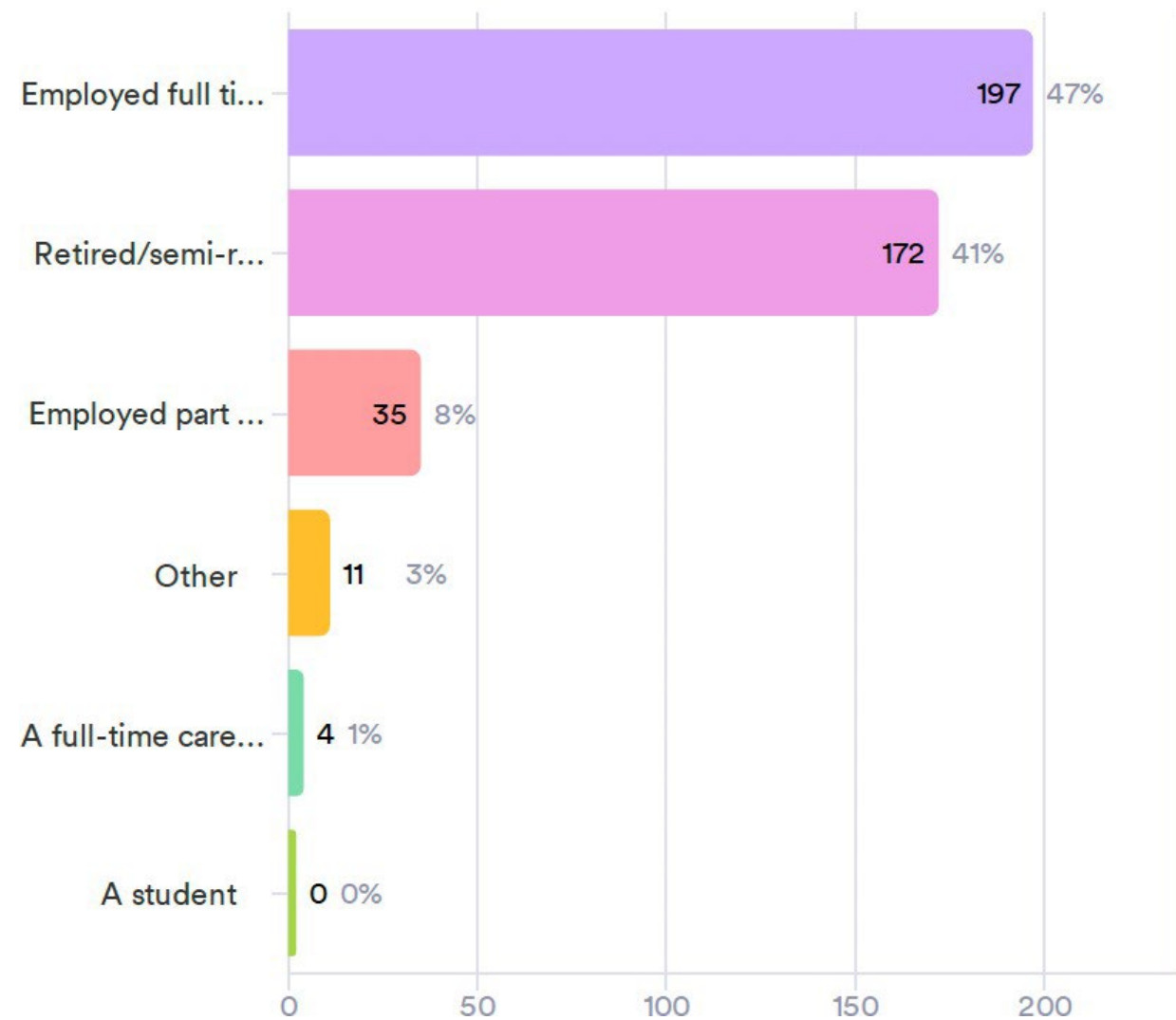
\* S O U R C E : V I S I T O R S U R V E Y



# They were equal parts working full time and semi/retired/part-time.

Are you:

419 Responses- 6 Empty



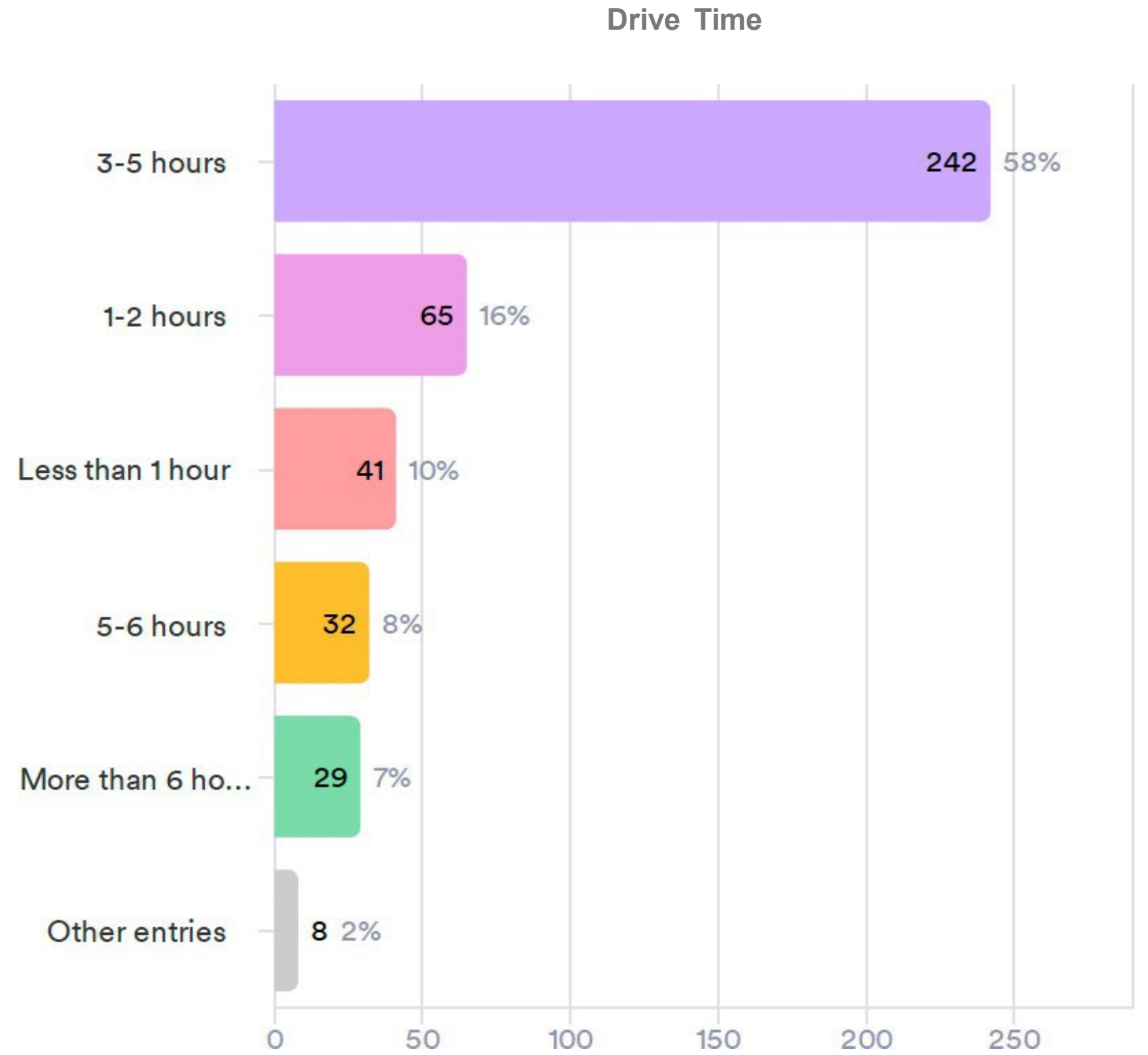
\* SOURCE : VISITOR SURVEY



# Most are coming from just a few hours away.

*These responses are in line with the Hunden Strategic Partners 2022 Tourism Study*

Hospitality and attraction partners operate on the understanding that half are from NYC. Travel Guide request numbers are highest in NYC, followed by Philadelphia, Albany, Hartford, and Boston.



\* SOURCE: VISITOR SURVEY



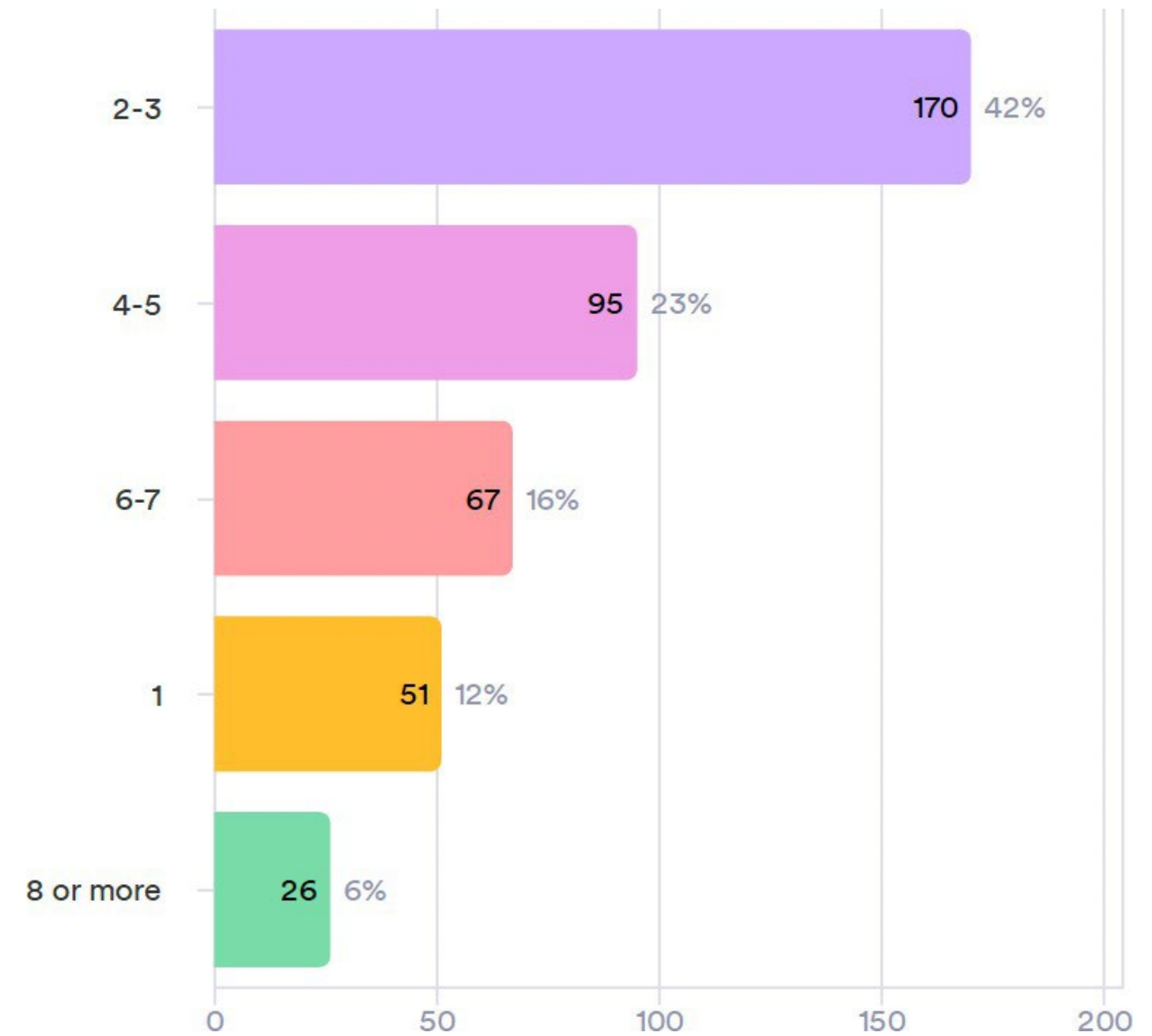
## They are coming by car.

- 409 respondents drove
- 7 flew to an airport close to Lake George and drove in
- Nobody took a train.

## They are staying a while.

- 45% stayed four or more nights
- 42% stayed 2-3 nights

How many nights was your stay in the Lake George area?

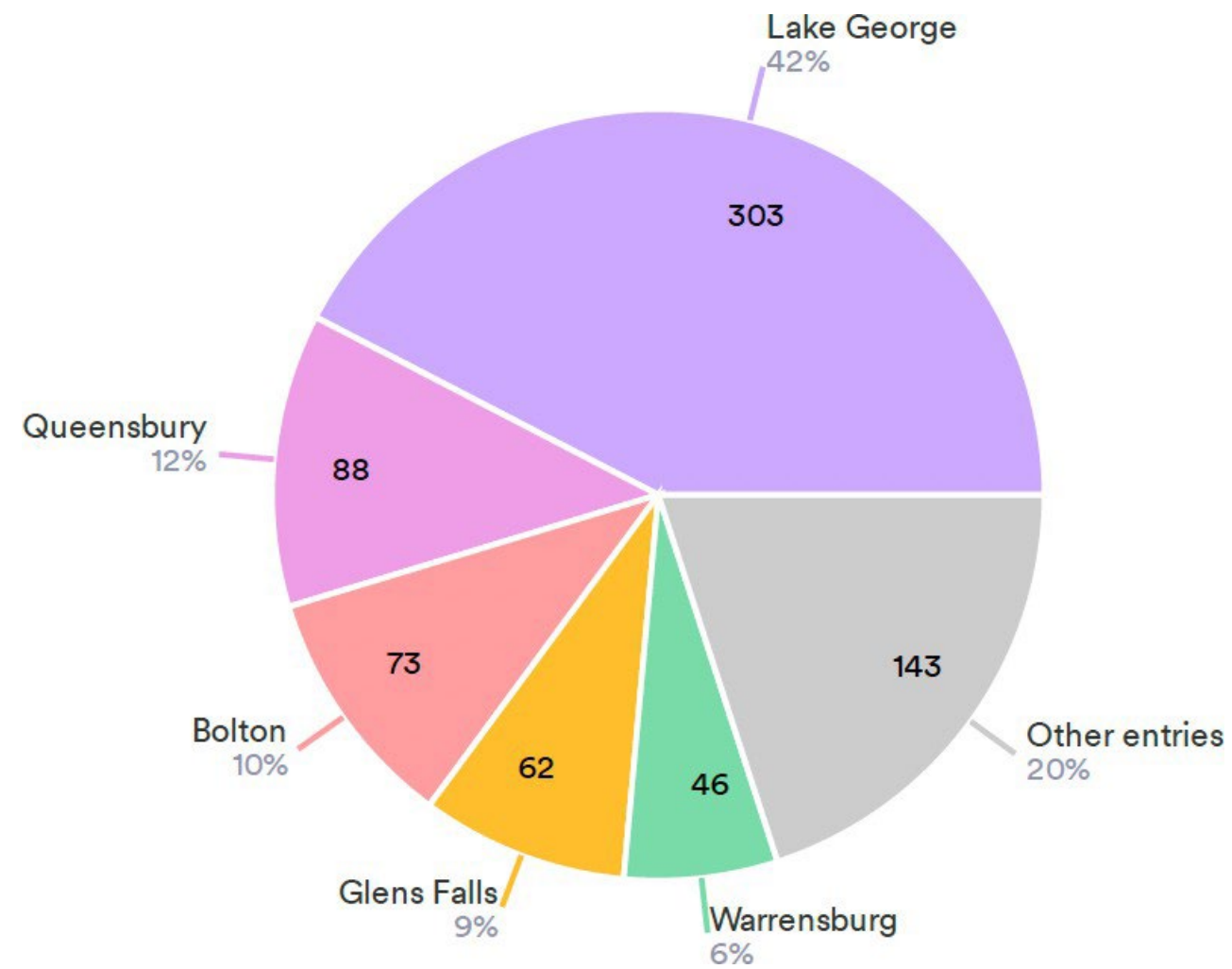


\* SOURCE: VISITOR SURVEY



# They are mostly staying in Lake George.

- Followed by Queensbury, Bolton, and Glens Falls
- Most stayed in more than one location during their visit



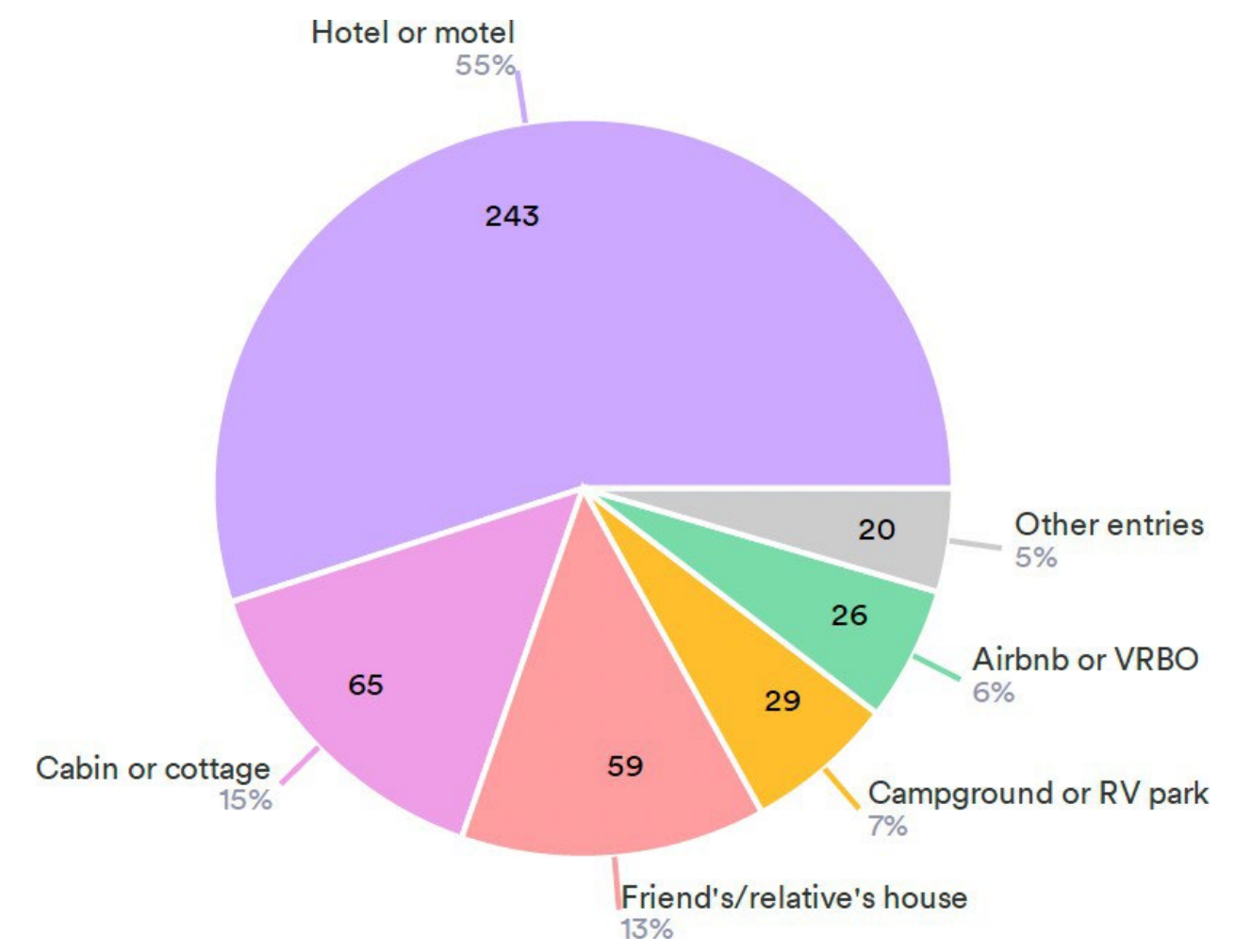
\* SOURCE: VISITOR SURVEY



I N S I G H T S & T H E M E S

# More than half stayed in hotels or motels.

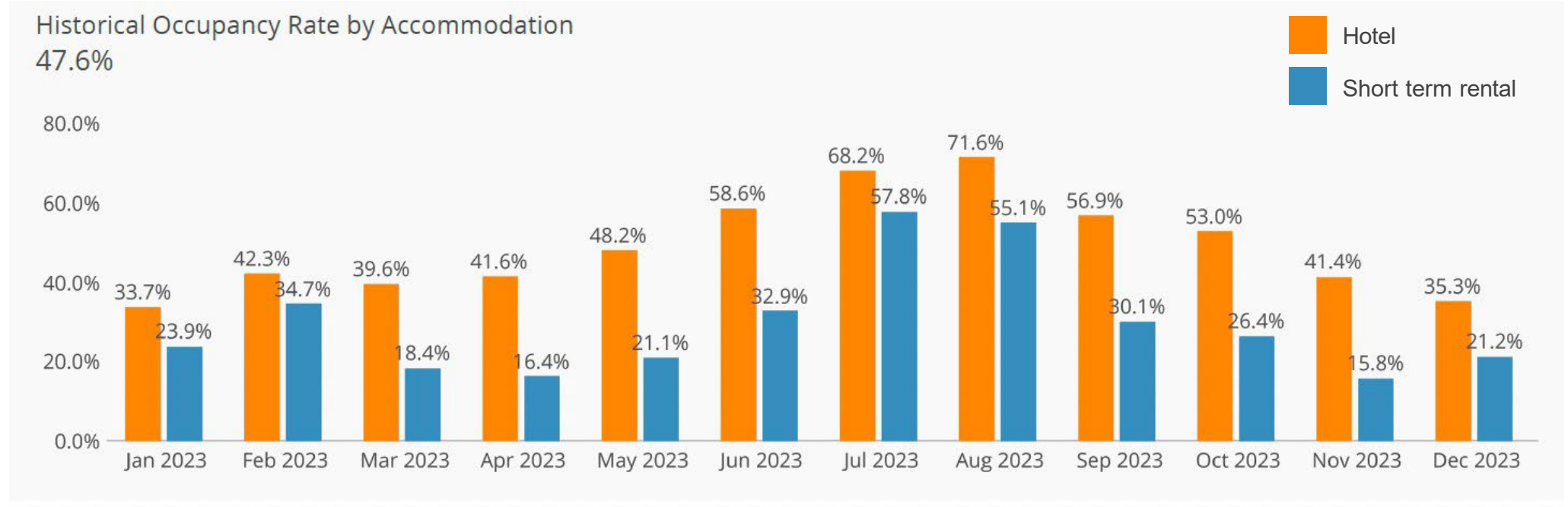
Which best describes your lodging during your last visit?



\* SOURCE: VISITOR SURVEY



Focus groups assumed more Airbnb or VBRO stays than the survey indicated.



\* S O U R C E : D O M O + R O V E A C C O M M O D A T I O N S S U M M A R Y , 2 0 2 3



Covid accelerated the desire for wilderness experience and being connected with nature and brought an enormous wave of people up to either populate the existing places they had access to or to essentially buy into them. And many of those became Airbnbs because people were looking to mitigate the cost of them buying that place whenever they weren't there."

\* S O U R C E : F O C U S G R O U P S



## When choosing the Lake George Area for their most recent trip, more than a quarter of visitors only looked at Lake George.

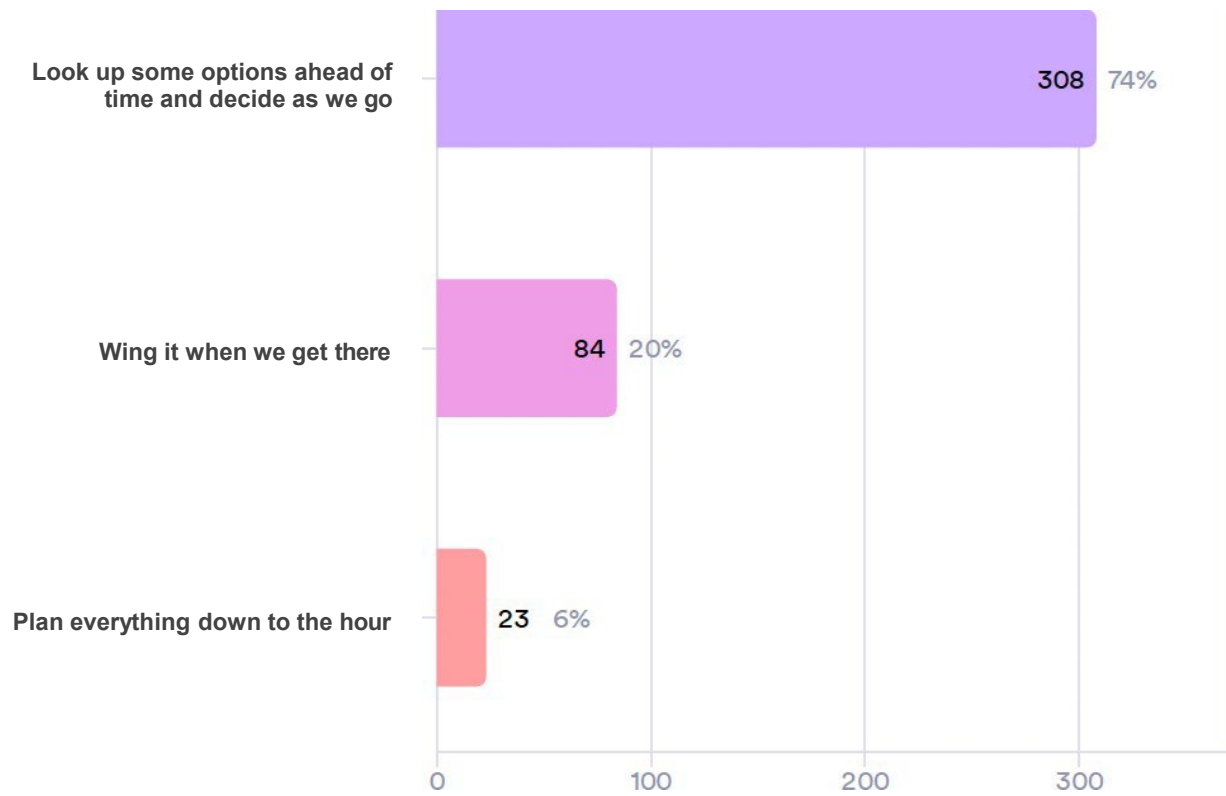
- 119 people didn't consider another destination
- Those who did looked at destinations with similar geographic features and amenities:
  - ▶ Top answers included Lake Placid, Vermont/Lake Champlain, Saratoga
  - ▶ Others: Maine, Catskills, New Hampshire, Poconos, other ADK towns, Cape Cod

*These responses are in line with the Hunden Strategic Partners 2022 Tourism Study*



# Most visitors “kind of” plan their vacations ahead of time.

Which best describes your trip planning style?



Revolution Rail echoed this: “We've noticed from our booking trends that people are booking once they’re already here.”

\* SOURCE: VISITOR SURVEY



## When people arrive, they have questions.

- What's nearby?
- Where should we eat?
- Can I drink the water here?
- Is there public transportation from the train station?

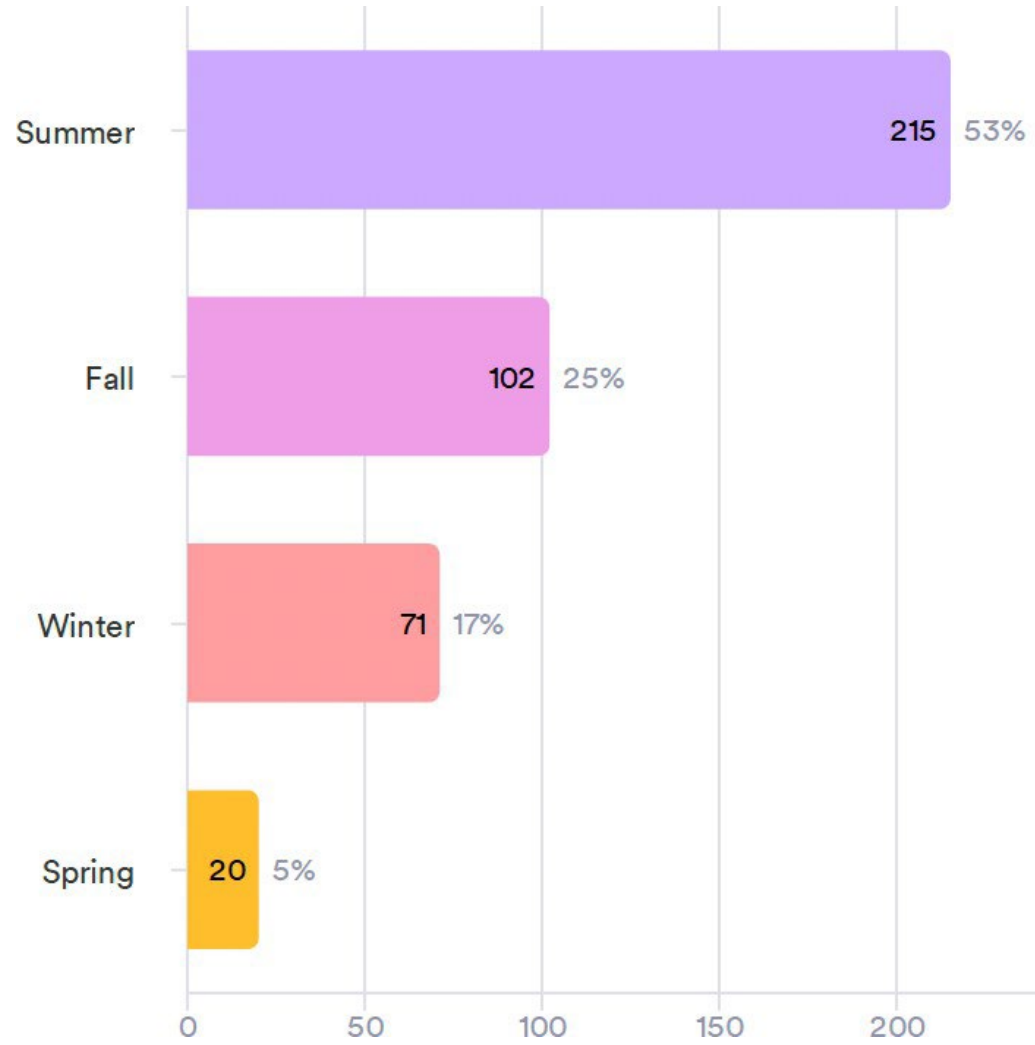
Most visitors have done some research on their own but want a local's perspective and recommendation to narrow down choices or surface options they hadn't discovered.

\* S O U R C E : V I S I T O R S U R V E Y



# Summer is the preferred time to visit.

What time of year was your last visit?



\* SOURCE: VISITOR SURVEY



# Families are the primary consumers of the Lake George Area. But visitors vary by season.

## Spring/early summer

- Business travelers for conferences.
- Weddings.
- Regional and local visitors (Syracuse, Albany, Connecticut).
- Families on the weekends for events and holidays (Mother’s Day, Memorial Day).

## Fall

- Seniors and people without kids; leaf peepers, cultural travelers.
- Event focused. Tend to book farther in advance.
- Families on the weekends for events.
- Regional and local visitors.

## Summer

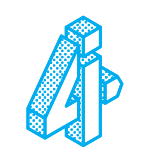
- Families. “The Americana summer family experience.” Spontaneous planning and decisions. Travel from farther away.

## Winter

- Skiers
- Families
- Events
- Weekends

*This doesn’t jive with visitor ages skewing 50+*

\* S O U R C E : F O C U S G R O U P S



## Some groups are NOT visiting.

### Ages 25-35

Have discretionary income, no kids, travel for experiences; going to Lake Placid which is cool, chic, trendy, Instagram-able. Perception is older, campy here.

### International visitors

Partners recognize it may be too early to see results of current efforts

### Sportsmen shows

Draw 200,000 people in Pennsylvania, but aren't hosted in the Adirondacks, which feels like a missed opportunity

### Canadians

Haven't seen a strong Canadian presence in years; saw a lot more when the exchange rate was stronger

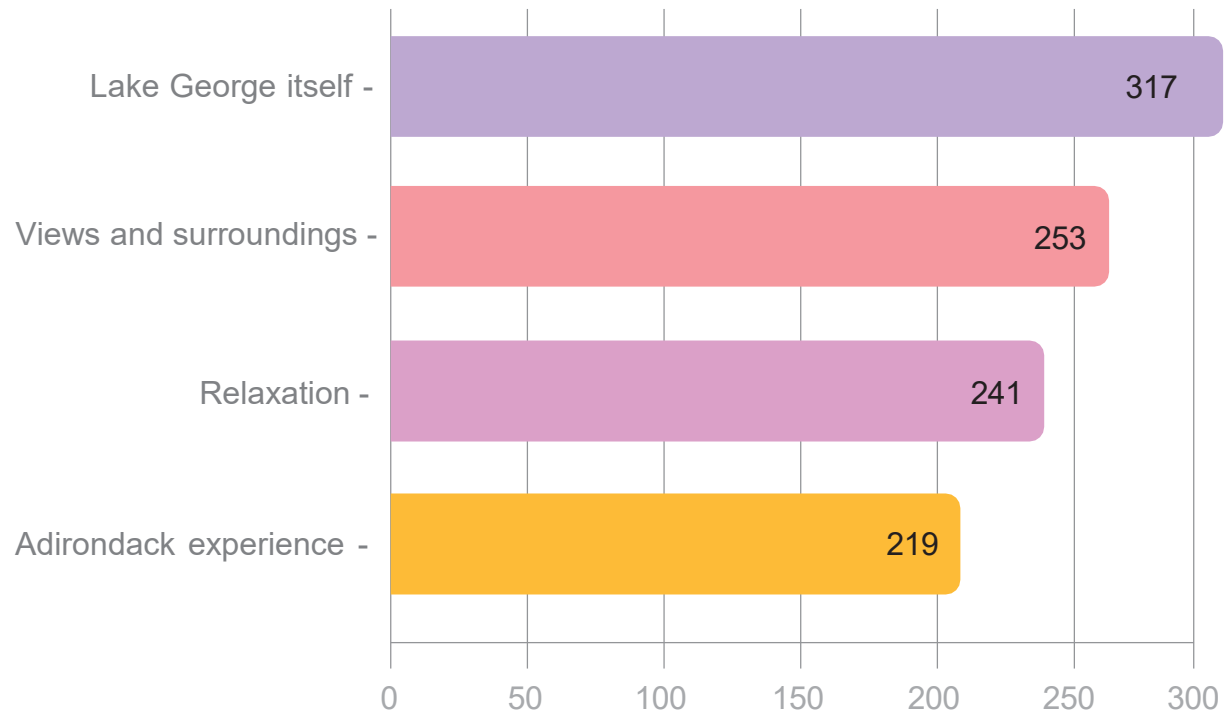
### Tours/busses/motorcoach

Used to be a big source of visitation, especially for foliage season; many operators used to include Lake George on the route and don't now

*Focus group participants mentioned specific efforts underway to attract younger and international audiences.*



## Visitors are coming to Lake George for:



*Focus groups say events are a major draw in all seasons and attract a wide variety of ages, incomes, interests.*

\* S O U R C E : F O C U S G R O U P S

- Outdoor activities - 185
- Family tradition - 155
- Food & drinks - 148
- The overall vibe – 140
- Easy to get to - 134
- Variety of activities for adults - 130
- Affordability - 100
- History - 94
- Old-timey attractions - 70
- Variety of activities for kids - 63

- Other lakes or rivers – 51
- The locals – 48
- Winter activities – 41
- Arts & culture – 39
- An event - 29 Which one? Americade (4), Winter Carnival, Soul Bloom Festival, yoga events, milestone birthday, Hot Air Balloon Festival, Fourth of July, Warrensburg Yard Sales
- Nightlife - 29
- Modern amenities - 28
- Wedding - 7
- Work gathering – 6
- Other – 2 (mountain biking, Six Flags and other touristy things)



## Some attractions are creating their own draw.

**Revolution Rail** brings on average 40,000 to 50,000 visitors across the county per year.

- Take visitors' photos for free, share the album; visitors share on social
- Forming relationships directly with international tour operators (Netherlands) to be a featured attraction.
- Adding AI concierge to website to serve multiple languages.
- Looking into corporate team building audiences and partnering with others to create a draw.

**Thurman** has created its own identity around immersive agricultural traditions.

- Maple Days, sugarhouses welcoming visitors, "Maple Country"
- Farm Tour with 13 stops, agrotourism, Nettle Meadow Farm

### Letterboxing Trail

- Thrown together with minimal funds, exploded quickly
- Draw for people out-of-town, but many locals don't know about it



## Some gems remain hidden (or under-emphasized).

The region's **food scene** has improved and grown significantly in recent years, especially in Glens Falls thanks to the SUNY Adirondack Culinary Center and its grads.

The region's rich **cultural assets** – museums, galleries, theater, symphony, music festivals. They're year-round and world-class. "Our trees look like everybody else's trees, but they don't have a preeminent art museum." Addendum: For someone coming from NYC or other big cities with rich cultural, this won't be the draw but it'll be an added plus.

Both of these are important to the year-round messaging, too.



## Visitors are traveling within the region —but not as much as they could be.

**Summer:** Need to draw people out of Lake George into the rest of the region.

**Winter:** Need to encourage skiers to stay in Lake George.

**Observation:** Downstate visitors, who are used to long commutes and sitting in traffic, perceive Warren County attractions outside of Lake George to be too far away (but they're often only a 15- or 20-minute drive).

\* S O U R C E : F O C U S G R O U P S



## Describing the Lake George Area to someone who has never been here before



“It's everything. It's the rustic Adirondacks, it's the memories, it's the coconut oil by the pool. It's a pristine lake.”

“It's a place of wellness and respite – fresh air, clean water, arts, self-care.”

“It's the jewel of America.”

“It's the northeast preeminent outdoor recreation and vacation area.”



## Lake George makes people feel:



“Warm and fuzzy.”

“Ahhhhhh.”

“Once you discover it, you’re hooked.”

“You can go back and face the world with a little more inside of you.”

\* S O U R C E : F O C U S G R O U P S





I N S I G H T S & T H E M E S

# What sets the region apart is the lake(s).



Nobody has lakes like we do and nobody has the lake that we have.”

Lake George is one of the cleanest lakes in the world; spring-fed, so all of the water is replaced every seven years.

\* S O U R C E : F O C U S G R O U P S



I N S I G H T S & T H E M E S

## Clean water draws visitors (it's not just an ecological accomplishment).

People can relax when they know the water is fine for swimming, boating, fishing.

Protections on the land around Lake George preserves the wild mountain views from the water (not hillsides and shorelines full of homes). That will never change.



“Anything that threatens the lake is a threat to tourism.”

“Without the clean lake, we're just another small upstate town area.”



# The variety of activities sets Lake George apart from the rest of the Adirondacks and other similar destinations.

There aren't many places where there is so much to do and see in such a concentrated area.



Lake George serves as a hub to all of the things. You can go camping but not struggle to find supplies."



You can get in the middle of nowhere pretty quick, but you can also get in the middle of everywhere just as quick."



If you go to any destination in the world and you look at their attractions, we have the same one in Lake George."

\* S O U R C E : F O C U S G R O U P S



# The warmth of the people makes visitors feel welcome.

Hospitality partners regularly see survey results and anecdotes that highlight the friendliness and welcoming nature of staff and residents.



They get a smile, they get a thank you for coming. You don't get that in all parts of the United States."



It's genuine hospitality. It's not 'my pleasure' fabricated. It's a genuine, warm family feeling."

\* S O U R C E : F O C U S G R O U P S



# Visitors have evolved over the past decade.

### Then:

- Road trip from a radius around Lake George
- Families, retirees
- White

### Now:

- More urban (60-mile radius around NYC)
- Younger
- First-time and recent repeat visitors
- Uptick in South Asian descent



For demographics, you have to look at what's happening down [in NYC] and who has the disposable income in those regions and you're probably going to see a demographic shift here from what was normal.”

ALSO more second homeowners since COVID, when people discovered or re-discovered the area and bought property.



## Today's visitors are coming for different reasons.

### *Then:*

- Coming for generations
- Nostalgia, tradition
- Stay in the same place, do the same things
- Comfort in familiarity
- Almost exclusively summer

### *Now, some of the first audience, but increasingly:*

- Want a variety of options and experiences
- Outdoors, Americana
- Modern amenities, Wi-Fi, well-kept
- Still summer-heavy, but more in other seasons (fall)



## There is overlap in the people who have always come to the Lake George Area and the people who are discovering it for the first time.

- Easy access to the Adirondack experience
- Clean, pristine water and water-centric activities
- An escape from city life
- Plenty to see and do in all weather, all year round
- “Only here” attractions – the legendary draws are also the instagram-able ones



## The Original Vacation/nostalgia message isn't the way to go.

While it might resonate with the folks who come back generation after generation, they don't need to be convinced to come back.

The nostalgia audience is aging out and having fewer kids to pass it along to.

This message doesn't appeal to first-timers or those newly familiar with the area—and that's where growth potential lies.



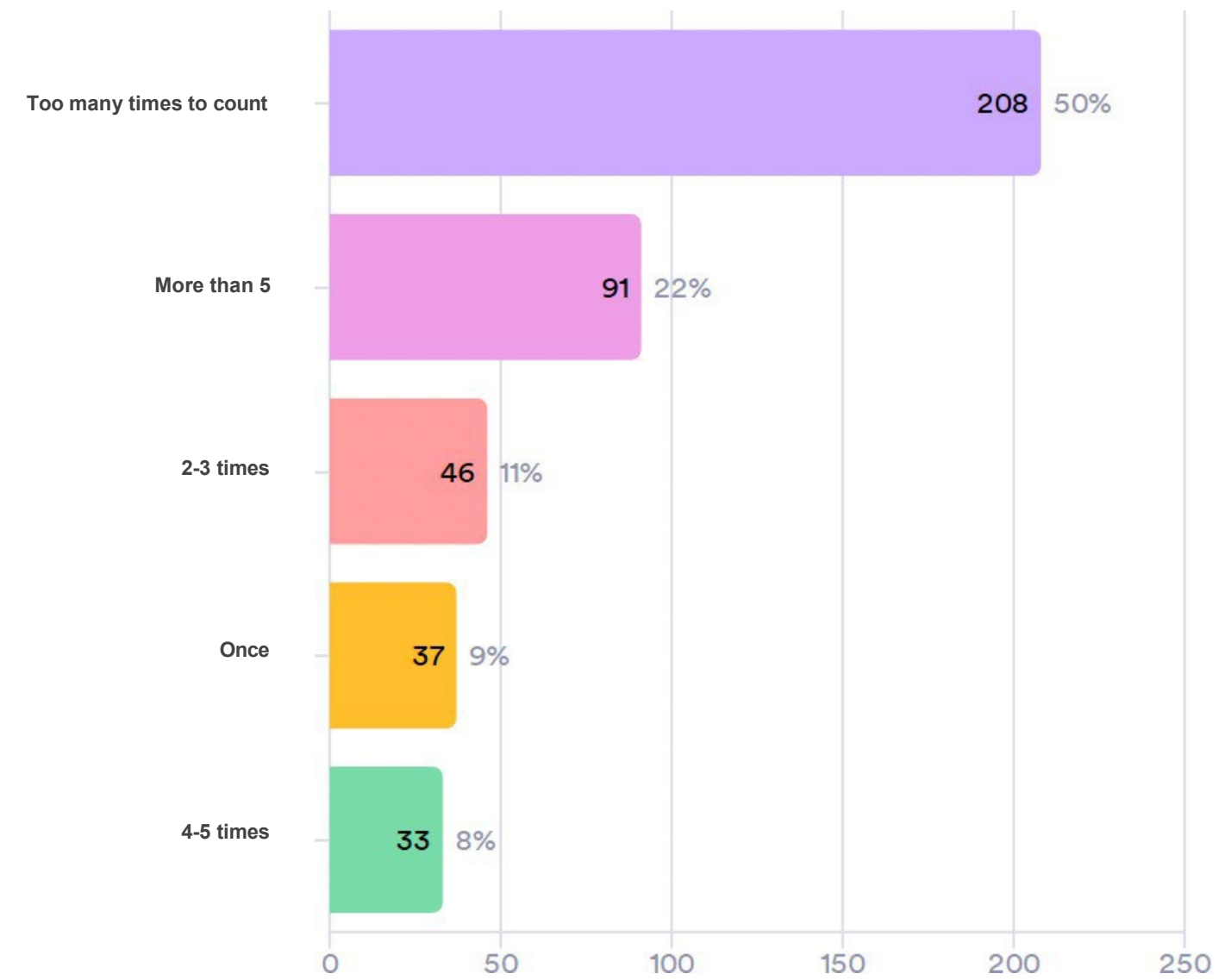
I think the nostalgia, it is wonderful. It's sentimental, but it's very limiting.”



# Marketing aside, the Lake George Area keeps people coming back.

80% have been here more than four times

### How many times have you visited the Lake George area?



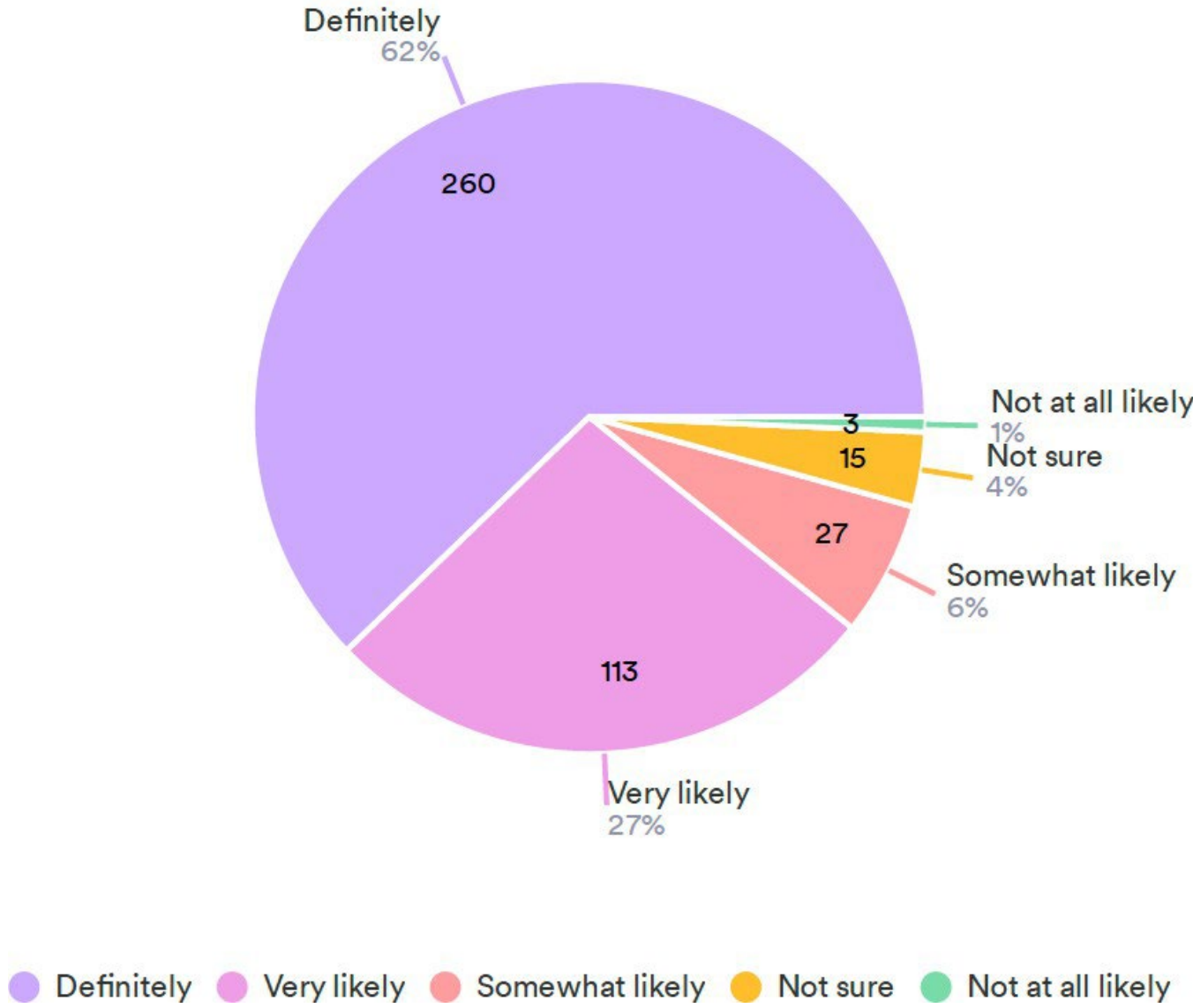
\* SOURCE: VISITOR SURVEY



And they plan to visit again.

11. How likely are you to visit the Lake George Area again?

418 Responses- 10 Empty



\* SOURCE: VISITOR SURVEY



## Regional partners are optimistic about the future of the region.

*But they have some concerns.*

### Lack of lodging on the heels of planned development in North Creek and Johnsburg

“How are we getting ready as a county and North Creek for 2026 when the new zip coaster coming in is **projected to bring another 40,000 people to North Creek** on the average of 200 people a day from May through October?”

“And we do have development coming into Johnsburg and there is an active call for more traditional lodging up here, but for now, we look to the Sagamore, Fort William Henry and even the Q and all the places in Lake George to house those people, because **there's really nowhere for them to stay anywhere in the northern part of the county.**”



## Increased collaboration among partners could improve the visitor experience and economic impact.

“To some degree **we're in bed together because of artificial geographic boundaries** and there's something about that divide where the mountains begin. The northern part of the county is really separated. I think more business communications, collaborations, discussions, integrations, would also **strengthen us as a total economy.**”

“We're deeply contemplative about this relationship between Lake George and the northern part of the county. **We need each other and we need to be doing more together** to be more reciprocal and integrated for kind of that seamless ‘let's get 'em for a whole weekend and not let 'em go anywhere’ experience.”

One suggestion on the simpler side that came up repeatedly was a better system for sharing assets like photography and video, a library that all partners could access, use, and share.

\* S O U R C E : F O C U S G R O U P S



## Local stakeholders want to lean into the four-season mentality and market it better.

### Solving “the winter problem”

“If we could solve the winter problem, maybe redirection of bed tax or resources, more events, more attractions, more things open in the winter and help this area become year-round, that would be a big plus.”

“Let’s get rid of the term ‘shoulder seasons’ and boost all year round.”

### Year-round visitation has chicken-and-egg implications

“It is the age-old problem here that some business owners don't believe it's in their interest to stay open in October, November, December. And because they don't stay open, visitors don't come.”

This has implications for staffing, steady employment opportunities, etc.



# Events are seen as an essential part of drawing visitors in all seasons.

## Increase emphasis on events

This was a universal topic in every focus group.



We need serious year-round events with serious marketing money behind them.”

November, December, January

Challenges are the hours needed to host big, successful events, and in the groups’ opinions, how county money is allocated for support.



## Ads are not catching attention.

*As a whole (not just Warren County Tourism), campaign creative coming out of the region lacks luster.*



The content, our events, and the marketing are tired. They don't show a spark of innovation. They don't jump out at me and say, wow, I'm surprised that's really different. If you looked at an ad from 1982 and you looked at an ad from 1992, they wouldn't look different. It's too much the same.”



I N S I G H T S & T H E M E S

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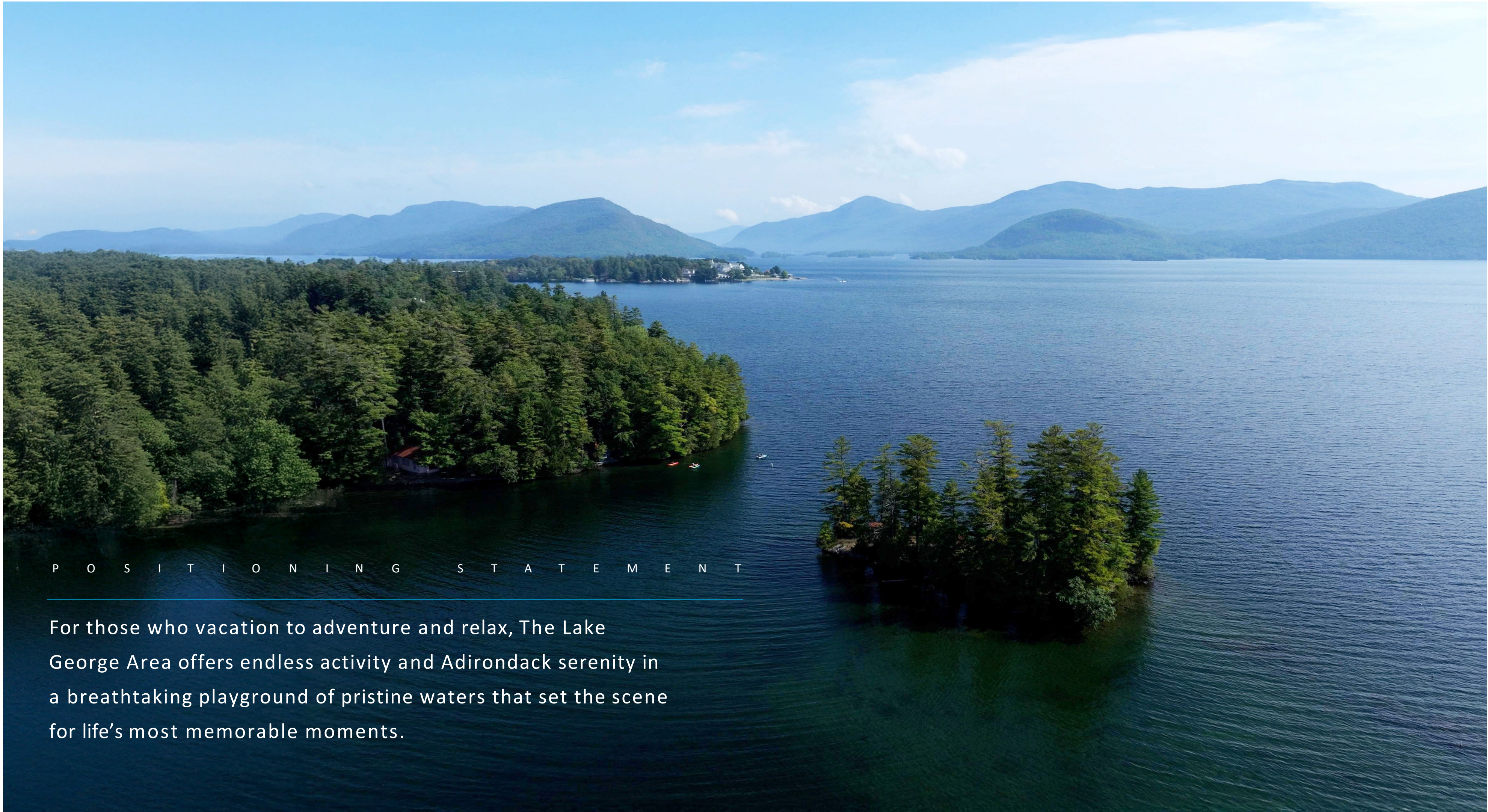
The discoveries that emerged through our discussion groups with people on the ground and the visitor survey, augmented by third-party research, confirmed some things we know about the Lake George Area's visitors and it's draw--and shed light on new perspectives and priorities.

These findings will serve as a critical touch point as we evolve the brand and the invitation to visit the Lake George Area.



# Brand Positioning Statement

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P O S I T I O N I N G   S T A T E M E N T

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For those who vacation to adventure and relax, The Lake George Area offers endless activity and Adirondack serenity in a breathtaking playground of pristine waters that set the scene for life's most memorable moments.

thank you!

