



**Tourism Committee  
AGENDA  
June 23, 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 May 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 Quarterly Report
  - VI. Referrals: None
  - VII. Privilege of the floor and public comment
  - VIII. Motion to adjourn
- 

**Attachment #1:** Tourism Director Quarterly Report





Warren County, New York  
Destination Insights 2025 Q1 Report

Date: April 22, 2025

[rovemarketing.ca](https://rovemarketing.ca)



## Q1 2025 Insights – Key Highlights

- Approximately two-thirds of visitors (as detected from mobile devices) to Warren County were from in-state in Q1 2025.
- The share of out-of-state vs in-state visitors has remained relatively consistent between Q1 2025 and Q1 2024.
  - Within state, half of visitors originated from Albany followed by one-third from the New York City metro area.
- Half of visitors to Warren County stayed overnight in Q1 2025—slightly lower than Q1 2024.
- While hotel revenue comprised approximately 85% of total accommodation revenue in 2024, short-term rentals outperformed hotels across nearly all metrics in Q1 2025 compared to the prior year.
- Warren County hotel revenue, average daily rate and occupancy tax revenue were up about 2% in Q1 2025, compared to Q1 2024. Hotel occupancy rate was up slightly as well.
- Compared to the Upstate New York region, Warren County hotel metrics were below the region's growth in Q1 2025 as compared to Q1 2024.

## Q1 2025 Insights – Key Highlights

- Total Visa spending in 2024 reached nearly \$620 million—down 3% from 2023.
  - Visitors contributed to nearly half (46%) of total Visa spend in 2024.
  - Approximately half of Visa visitor spending was in restaurant and dining or retail categories in 2024.
- Albany, New York City and South Glens Falls contribute to more than half (55%) of visitor spending in 2024.
  - Visitor spending declined in 2024 from nearly all top origin markets but declined the most from Boston while Rutland, VT was flat.
- Total Visa spending in Q1 2025 reached \$115 million—down 2% from Q1 2024. Similar to 2024, resident spending contributed to 63% of total spending in Q1 2025.
  - For the last two years, first quarter Visa spending contributed to 19% of total spend while Q3 contributed one-third of the total.
- With the exception of Rutland which was up 4% the first quarter of the year, Visa spending has declined from all major origin markets in Q1 2025.
- For the first quarter 2025, domestic visitor spend by market segment was similar to last year with the exception of increased spending on restaurant & dining and entertainment while spending on fuel, food and grocery declined.

Q1 2025

## Mobile Location Data Visitor Insights



### What is Mobile location data?

Mobile location data is data (e.g. time stamp, lat/long coordinates, device ID) collected through the usage of mobile apps on your phone (news, weather, games, texting apps, traffic, etc.) It is privacy-compliant data collected from user location-enabled apps. Data is collected when those location-enabled mobile devices enters geo-fenced area defined by established points of interest. It is important to note that mobile location data is not visitation data but a sample of visitors and their behavior within a location

### Segment Definitions:

**Local Visitors:** Tourists who live within the County and New York State.

**In-State Visitors:** Tourists who reside outside the County but within New York State.

**Domestic Visitors:** Tourists who reside in the United States and outside New York State.

**International Visitors:** Tourists who reside outside of the United States.

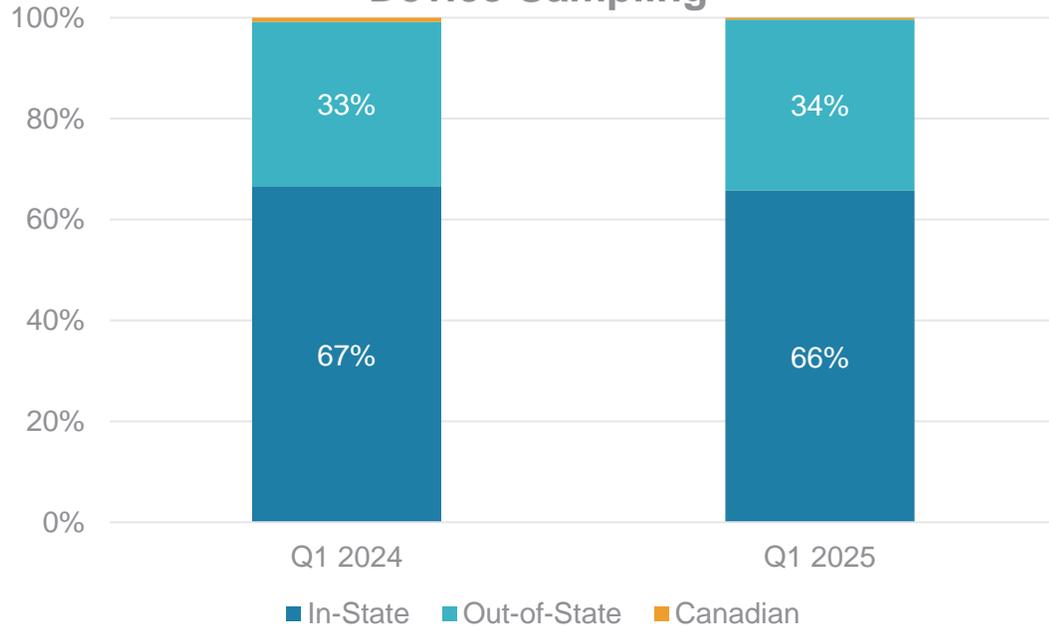
### What is Mobile location data best used for?

Mobile location data is best used to monitor the behavior of visitors while in your destination. Think of it as completed visitor surveys on steroids where you are asking questions such as how far did you drive from? Are you staying over night? Is this your first time? Where are you planning on going? What's your income level?

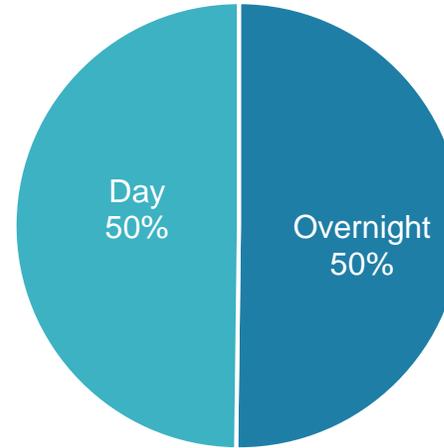
DMOs use mobile location data for managing and measuring event impact, promoting outdoor recreation, managing visitor dispersion, understanding origin markets, arrivals and departures – day of week and time of day, and more.

Warren County | Q1 (Jan – March)

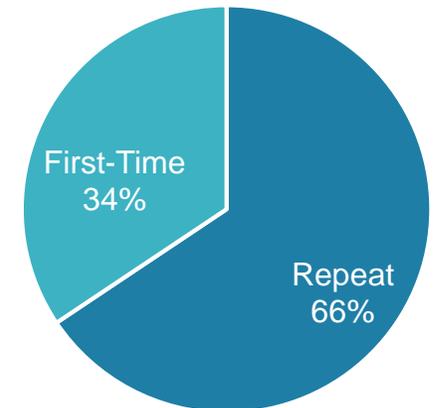
Visitor Segments – Based on Mobile Device Sampling



Overnight vs Day Trips  
Q1 2025



Repeat vs. First Time Visitors  
Q1 2025

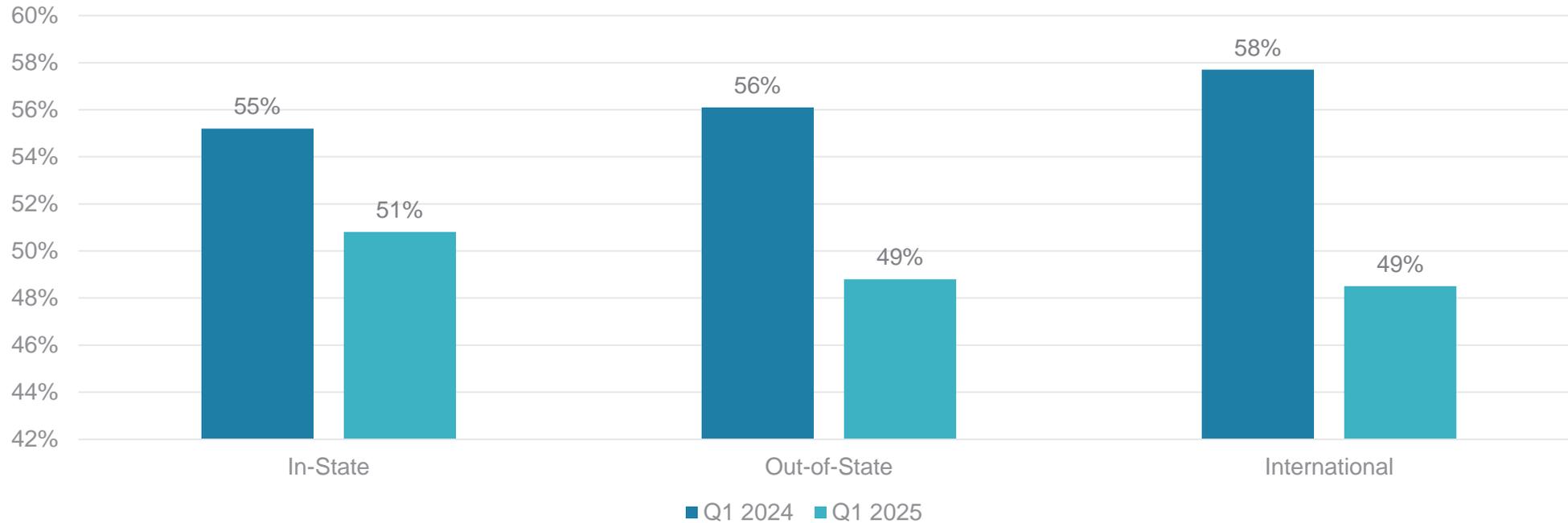


Data Insights:

- Two-thirds of visitors, as defined by mobile devices detected, were from in-state in Q1 of 2025—consistent with Q1 last year.
- The share of Canadians declined slightly but remained less than 1% of the mobile sampling.

Warren County | Q1 (Jan – March)

% Overnight Stays

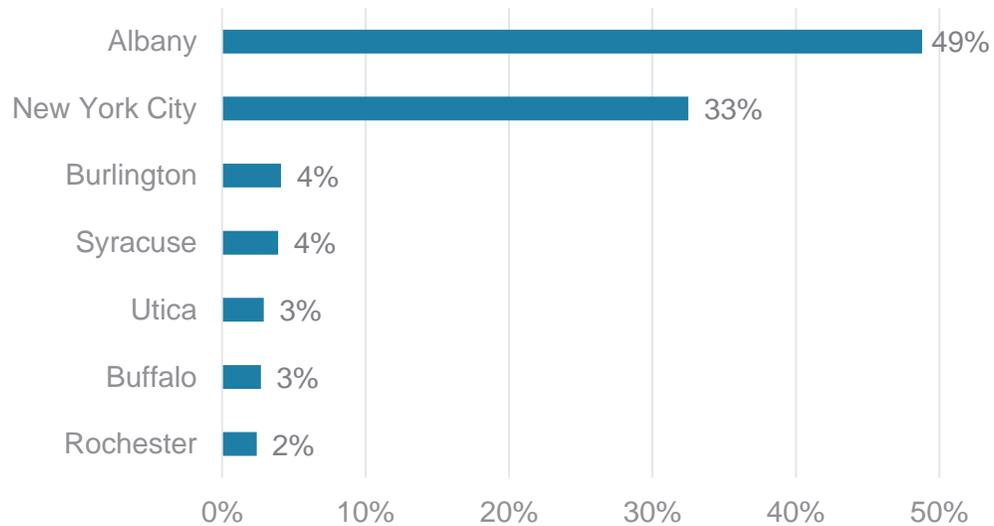


Data Insights:

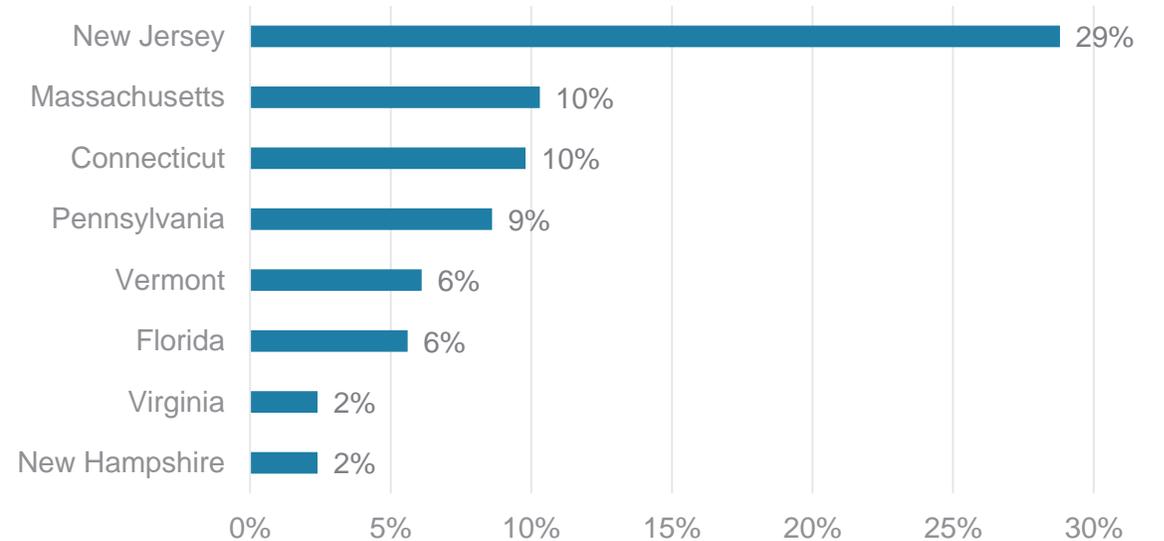
- Overall, half of visitors detected from mobile devices stayed overnight in Warren County in Q1 2025—down slightly from Q1 2024.
- Out-of-state visitors' likelihood to stay overnight declined more than in-state visitors in Q1 2025 while Canadians increased their likelihood.

Warren County | Overnight Visitors | Q1 (Jan – March) 2025

In-State Origin Markets



Out-of-State Origin Markets

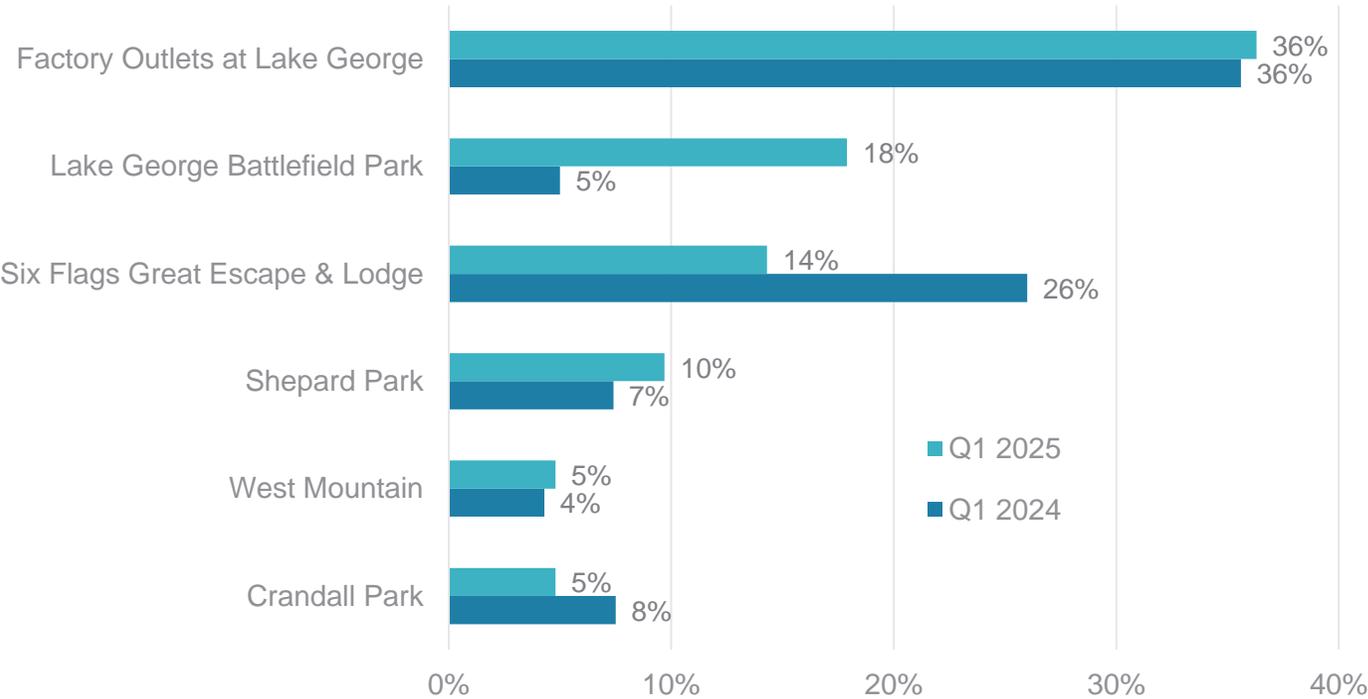


Data Insights:

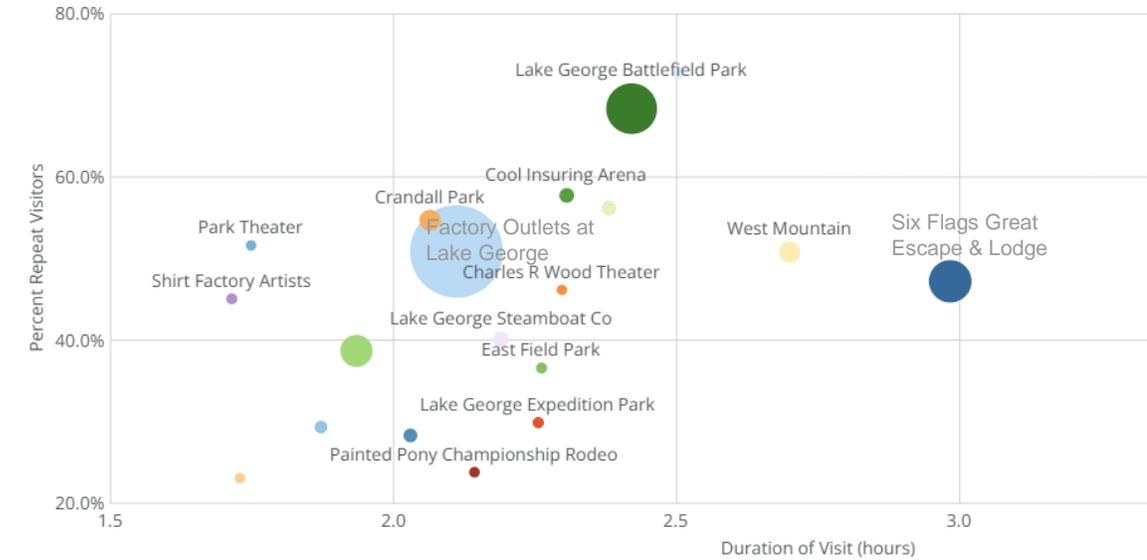
- Warren County visitors' market of origin for both in-state and out-of state overnight visitors based on mobile device sampling remained consistent between Q1 2025 and 2024.
- Within the overnight in-state origin markets which make up two-thirds of the total, nearly half were from Albany followed by one-third originating in the New York City metro area.
- Out-of-state overnight visitors were largely from the Northeast region with nearly three in 10 originating from neighboring New Jersey.

Warren County | Q1 (Jan – March) | All Visitor Segments | Tourism Experience – Attractions

Popular Attractions



Popular Places at a Glance Comparison



Data Insights:

- Of the attractions included in mobile device sampling for Warren County, the Factory Outlets at Lake George remain the most popular place as defined by mobile devices in both Q1 2024 and 2025.
- The share of visitors detected at Lake George Battlefield Park notably increased in Q1 2025 while the share seen at Six Flags Great Escape and Lodge declined.
- Lake George Battlefield Park has the highest share of repeat visitors while visitors are staying longer (averaging 3 hours) at Six Flags Great Escape & Lodge.

# Q1 2025 Accommodation Trends



## Short Term Rental

AirDNA tracks the daily performance of over 10 million properties on AirBNB and VRBO in 120,000 global markets. Short Term Rental Data collects reservation and booking information from AirBNB and VRBOs in a destination. It allows destinations to understand type of units within their region, the occupancy rate of their properties, the average daily rate for each type of rental, and more. Data can be analyzed by geography, time, type of properties and more.

## Lodging Performance

On a daily, weekly and monthly basis, CoStar/STR processes performance data from more than 85,000 hotels around the world. The data is submitted straight from the source: chain headquarters, management companies, owners and directly from independent hotels.

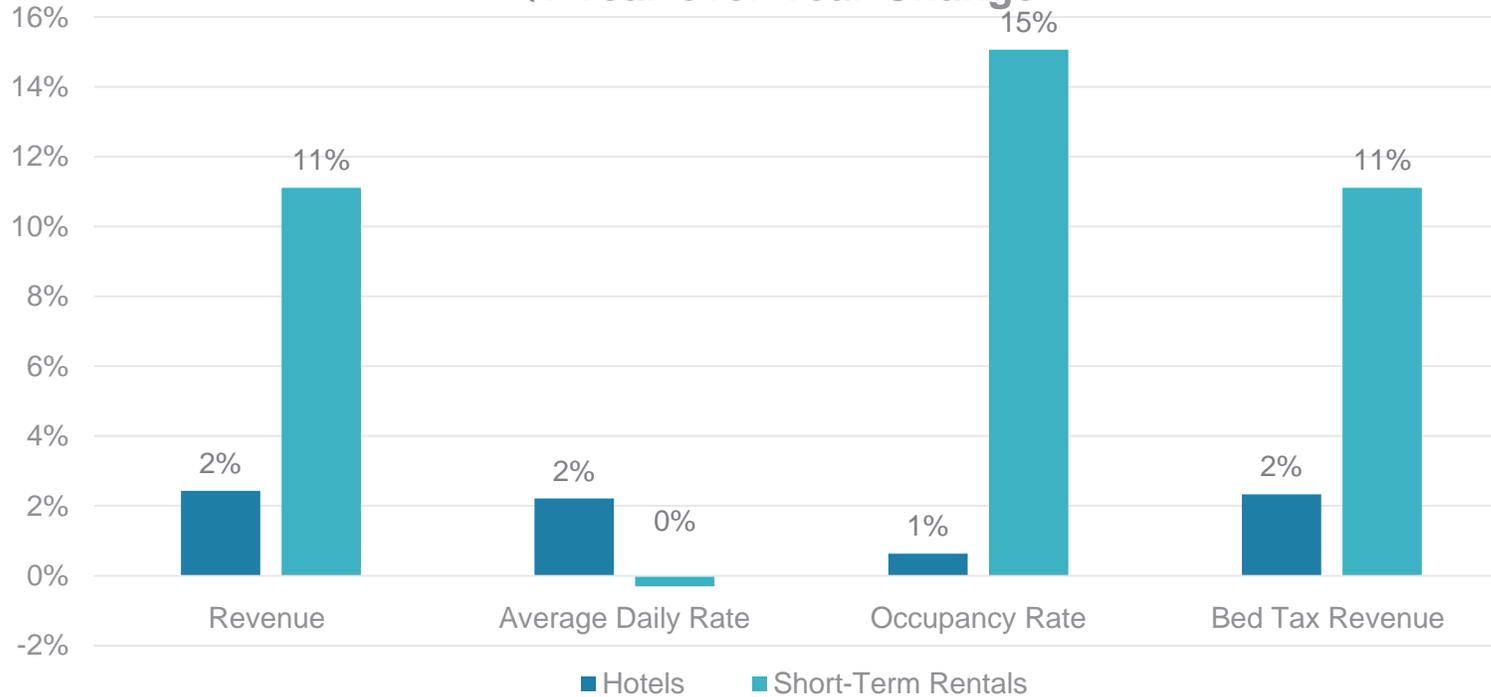
CoStar/STR collects data directly from hotels including rooms available, rooms sold and net room revenue on a monthly, weekly, and daily basis. They also collect data by source of business (transient, group and contract) and source of revenue (room, F&B, other).

CoStar/STR unlocks an enhanced view of the hotel landscape. Whether you're looking to understand your market positioning, support strategic decisions, or communicate value to stakeholders, CoStar/STR offers the depth and precision you need to elevate your insights by providing the following:

- Evaluate key performance metrics including Monthly Room Night Revenues, Occupancy Tax Revenues, Room Night Supply & Demand, Occupancy, ADR and RevPAR.
- Hotel performance data segmented by tier, allowing for more targeted analysis and competitive benchmarking.
- Forward-looking forecasts for key hotel metrics such as occupancy, ADR, and RevPAR, helping you plan with confidence.
- Benchmarking capabilities across global regions, enabling you to compare your destination's performance against any key market worldwide.
- A reliable and standardized data source, trusted by industry leaders for investment decisions, strategic planning, and market evaluation.

**Warren County | Hotel & Short-Term Rental | Q1 (Jan – March)**

Q1 Year-over-Year Change



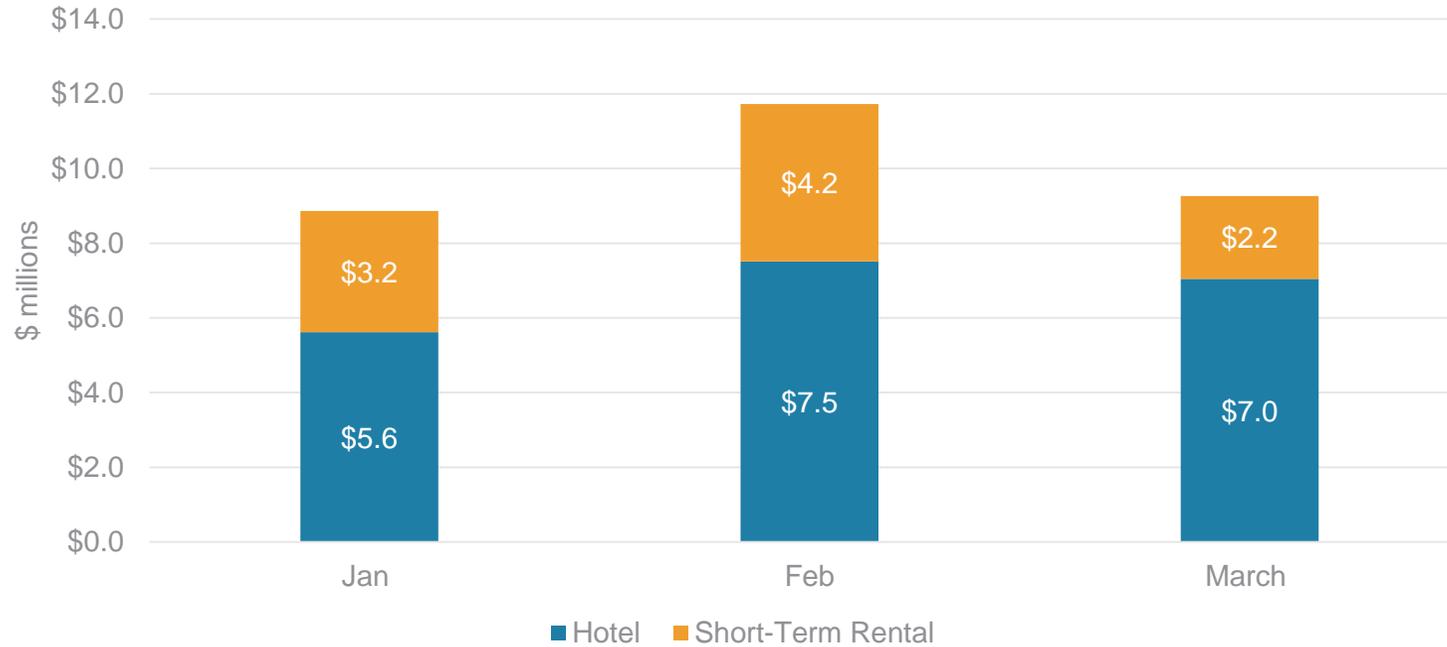
Q1 2025			
Accommodations Performance			
	Hotels		Short-Term Rentals
Revenue (\$ millions)	\$	20.2	\$ 9.9
Average Daily Rate	\$	138	\$ 357
Occupancy Rate		37%	24%
Bed Tax Revenue	\$	806,765	\$ 394,814
Active Rentals			1,445

**Data Insights:**

- While hotels comprised approximately 75% of total accommodation revenue and 85% of accommodation demand in 2024, short-term rentals outperformed hotels across nearly all metrics in Q1 2025 compared to the prior year—particularly total revenue, Occupancy tax revenue and occupancy rate.
- Short-term rentals average daily rate is nearly 2.5 times higher than hotels—likely due to the fact they tend to be larger properties with more rooms available.

Warren County | Total Accommodation | 2025 Trends

Total Accommodation Revenue 2025 YTD

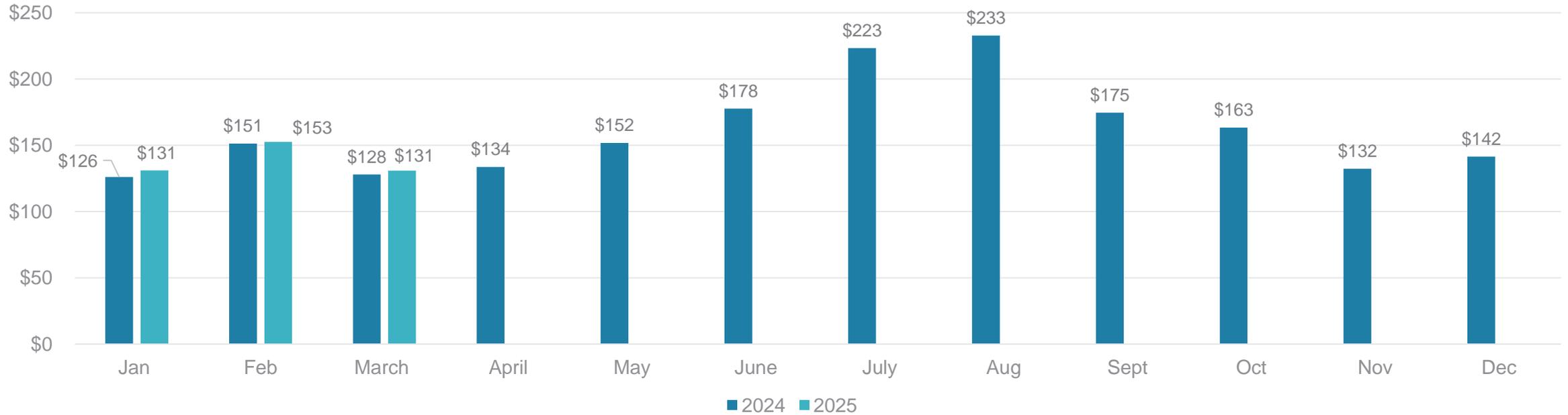


Data Insights:

- Both hotel and short-term rental revenue were up in Q1 2025 compared to Q1 2024 with the contribution of short-term rental revenue growing slightly, now representing 32% of total revenue.

Warren County | Hotels | Year-over-Year

Hotel Average Daily Rate Trends

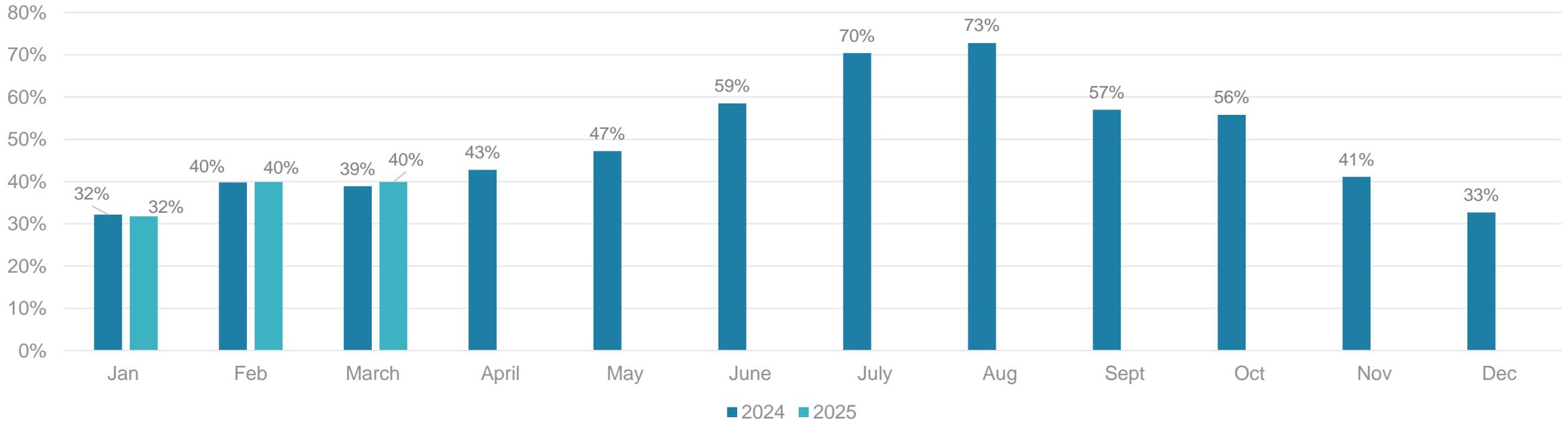


Data Insights:

- Average daily rates for Q1 2025 is trended similarly, yet slightly higher compared to Q1 2024.
- For the full 2024-year, average daily rate was \$161, peaking in August at \$233.

Warren County | Hotels | Year-over-Year

Hotel Occupancy Trends

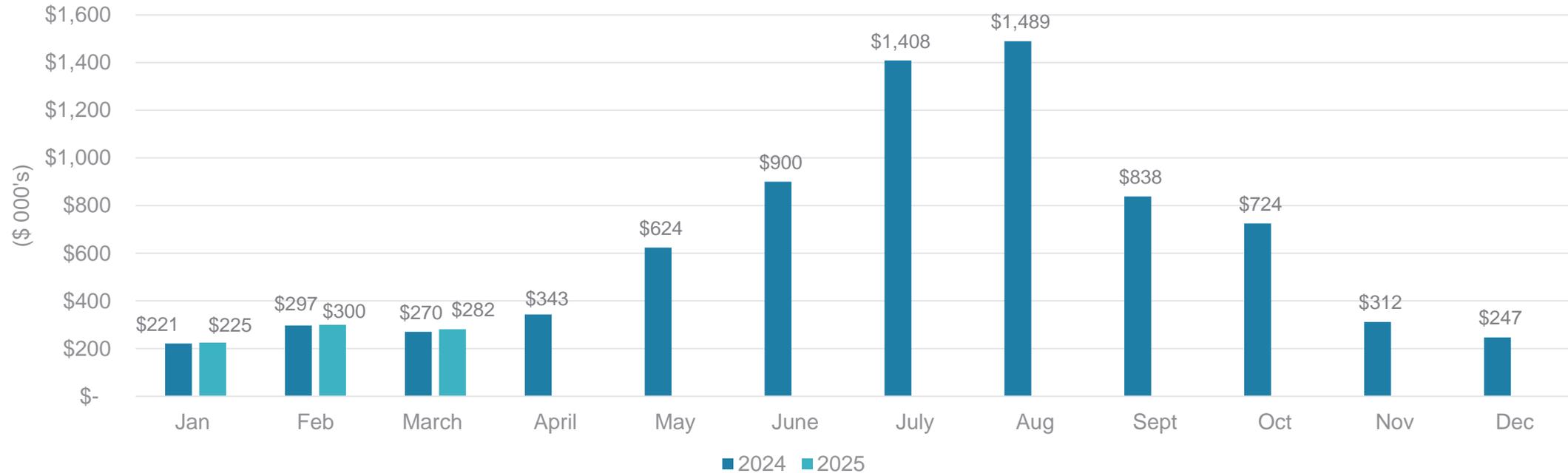


Data Insights:

- Hotel occupancy for Q1 2025 was nearly identical to Q1 2024—averaging 37%.
- For the full 2024-year, occupancy rates averaged 49%, peaking in August at 73%.

Warren County | Hotels | Year-over-Year

Hotel Occupancy Tax (4%) Trends ('000s)

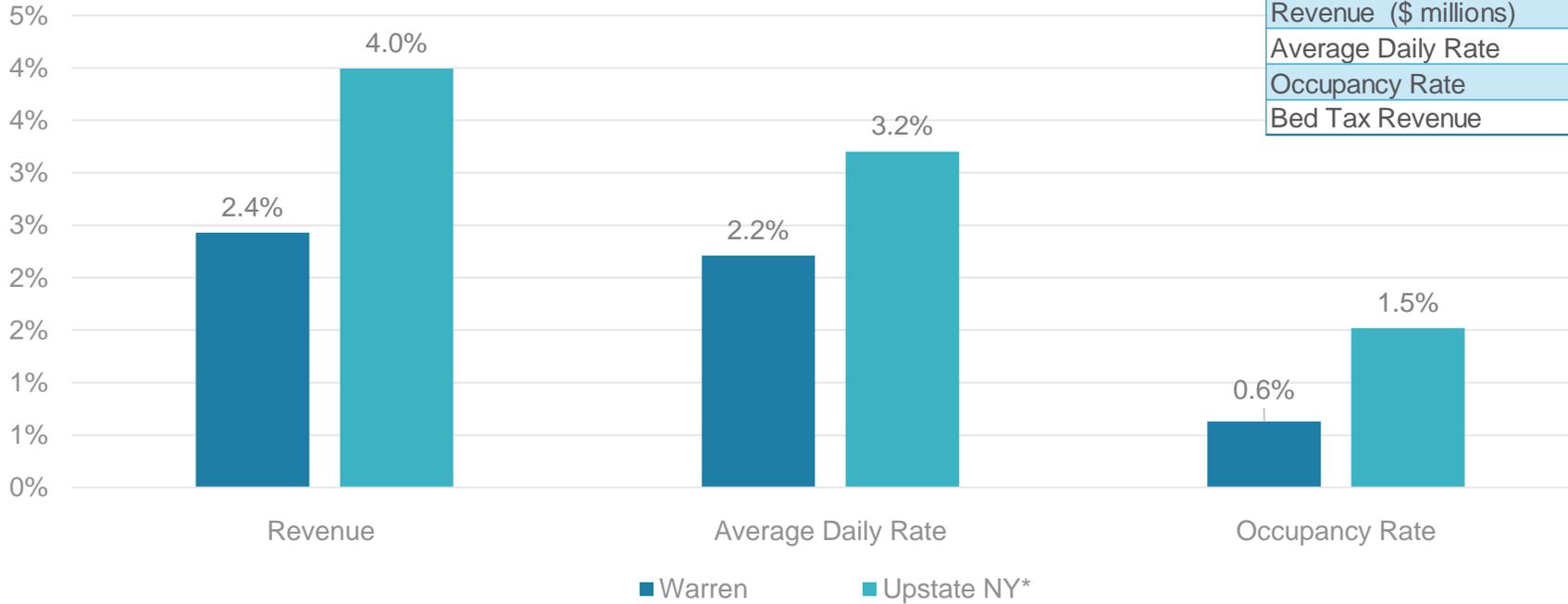


Data Insights:

- At a 4% rate, total hotel occupancy tax for Q1 2025 was 2% above Q1 2024, yet the first three months of the year made up just 10% of total occupancy tax revenue in 2024.
- Half of the full year's hotel occupancy tax revenue was generated in June, July and August in 2024.

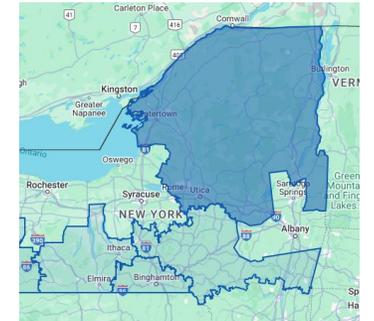
Warren County vs Up State New York Region | Hotels | Q1 (Jan – March) Year-over-Year

Year-over-Year Change



	Q1 2025	
Hotel Performance	Warren County	Upstate New York
Revenue (\$ millions)	\$ 20.2	\$ 87.4
Average Daily Rate	\$ 138	\$ 138
Occupancy Rate	37%	42%
Bed Tax Revenue	\$ 806,765	

Upstate New York Area



Data Insights:

- Compared to the Upstate New York region, Warren County hotel metrics are slightly below the region’s growth in Q1 2025 as compared to Q1 2024.
- While average daily rates were comparable across Warren county and the region, Warren County’s occupancy rate was lower than the regions.
- \*As of May 29, 2025

# Q1 2025 Visa Spend Trends



## Visa Spending Data

### What is it?

Visa transaction data provides tourism a custom window into spend. Aggregated, depersonalized international and domestic cardholder spending on Visa debit, credit, commercial and prepaid cards. This unique real-world data provides prompt and accurate insight into where and how visitors are spending their money including:

**Tourism Spending Analysis** of tourist spending based on U.S. and International or other segmentation possibilities

**Visitor Origin Data** on the number of Visa cardholders visiting as well as total sales and average purchase size.

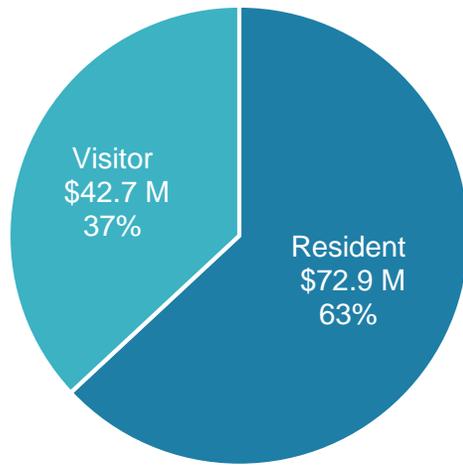
**Detailed Category Spend** view of tourist spending across hundreds of merchant categories – from lodging and airlines to restaurants and entertainment

### What is it best used for?

- Understand how international travelers are spending money in your destination
- Capacity planning and program initiatives for sports tourism marketing partners
- Track seasonality spend in destination and measure the economic impact of travel and tourism
- Optimize your tourism budget spending by visitor origin

Warren County | Total Visa Spend | Domestic | Q1 2025

Q1 2025 Spending Breakdown  
Total = \$114.8 Million



Total Visitor Spending Trends  
(\$ millions)

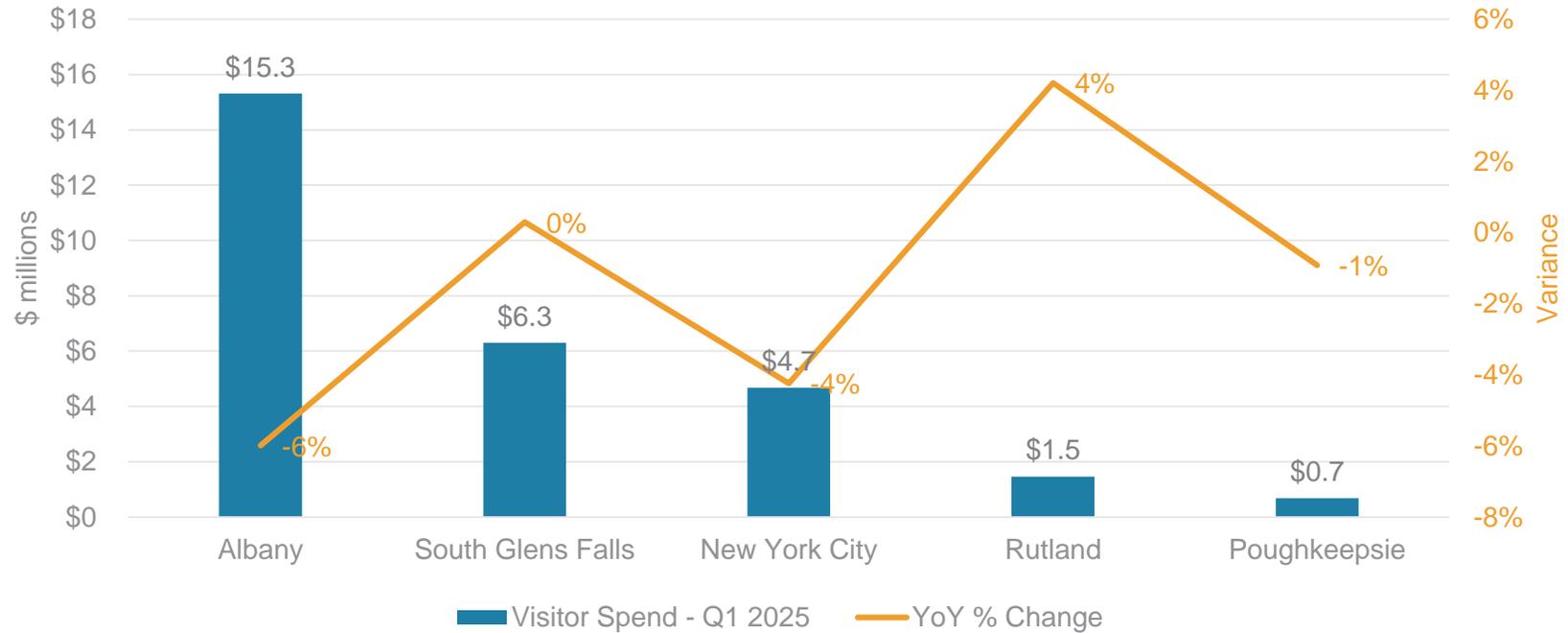


Data Insights:

- Total Visa spending in Q1 2025 reached \$115 million—down 2% from Q1 2024 and visitor spending was down 5% compared to Q1 2024.
- Similar to 2024, resident spending contributed to 63% of total spending in Q1 2025.
- For the last two years, first quarter Visa spending contributed to 19% of total spend while Q3 contributed one-third of the total.

Warren County | Origin Market | Visitor | Domestic | Q1 2025

Top Domestic Visitor Spending Markets - Q1 2025

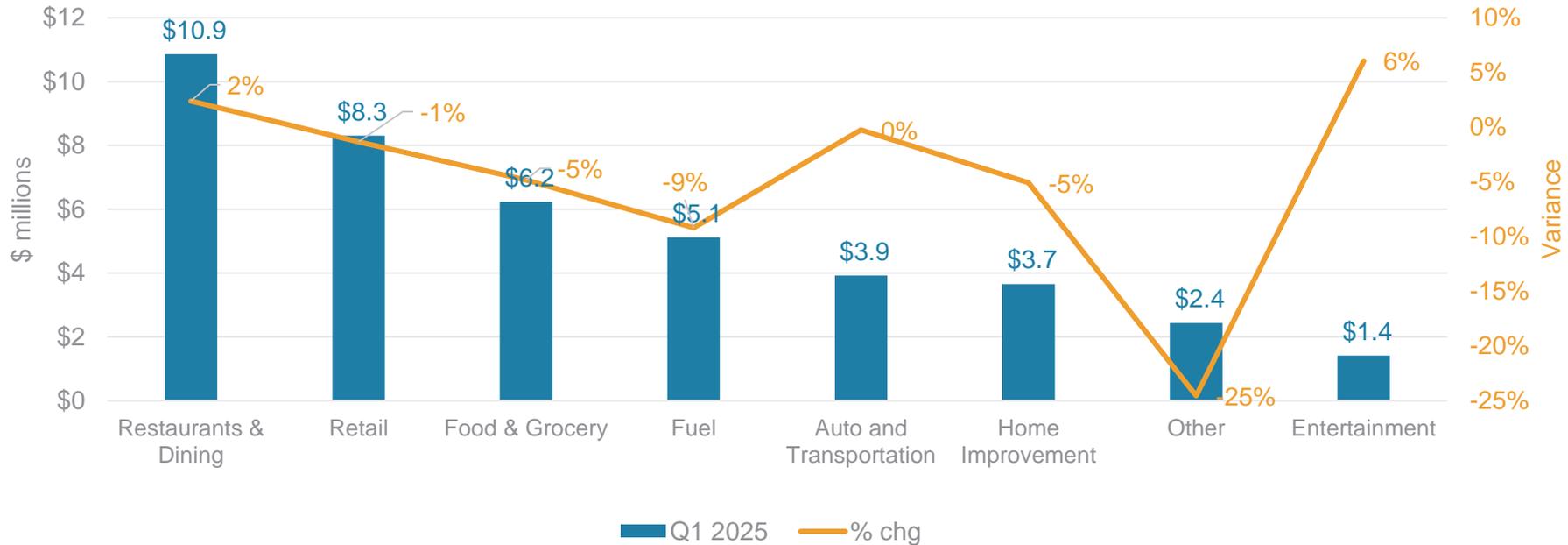


Data Insights:

- With the exception of Rutland which was up 4% the first quarter of the year, Visa spending has declined from all major origin markets in Q1 2025.

Warren County | Visa Spend Category | Domestic Visitor | Q1 2025

Domestic Visitor Spend Categories - Q1 2025

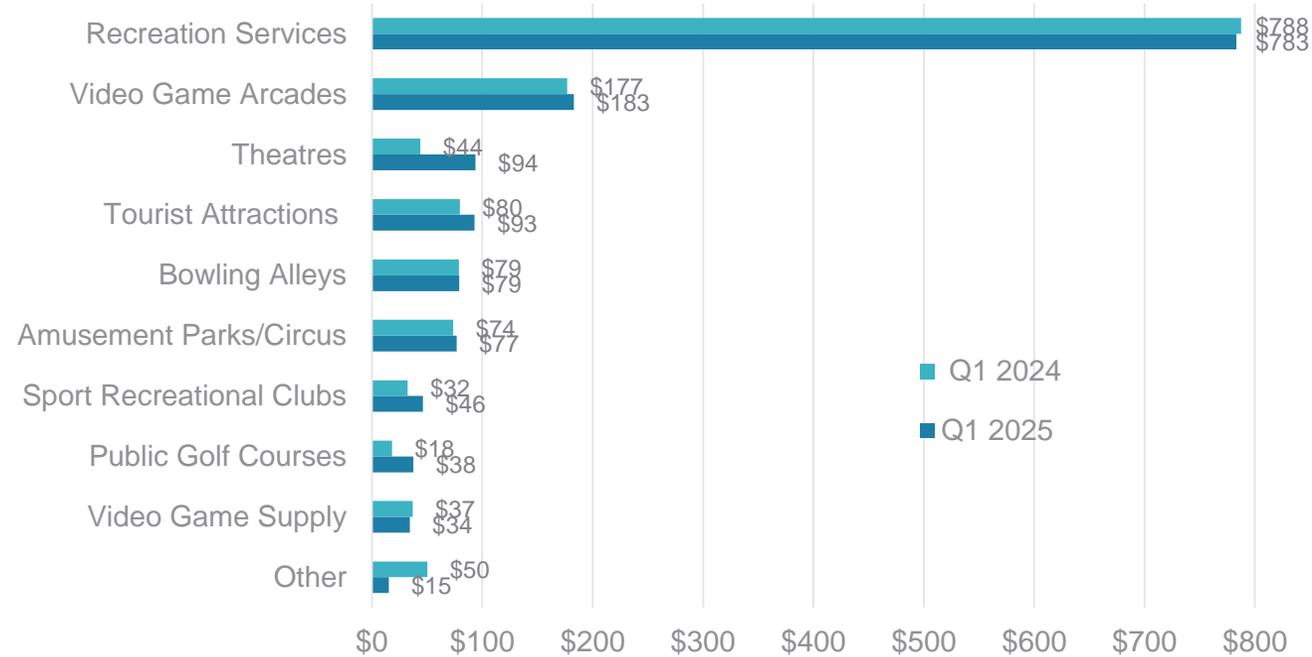


Data Insights:

- Nearly half of domestic Visa visitor spending was in restaurant and dining or retail categories in Q1 2025—similar to Q1 2024.
- For the first quarter 2025, domestic visitor spend by market segment was similar to last year with the exception of increased spending on restaurant & dining and entertainment while spending on fuel, food and grocery declined.
- Entertainment comprised 3% of total visitor spending in Q1 2025.
- Other includes cash withdrawals, hotels and lodging (on site) and drug stores.

Warren County | Entertainment Visa Spend | Visitors | Q1

Q1 Entertainment Visitor Spending (000's)



Data Insights:

- Top entertainment spending category was recreation services for Q1 2024 and 2025.
- Q1 2025 experienced notable visitor spending increases in video game arcades, theatres, tourist attractions, sport recreation clubs and public golf courses categories compared to Q1 2024.
- Recreation services are defined by Visa as “*Merchants providing a wide variety of recreation and entertainment services that require active physical participation....*”
  - Examples include miniature golf, ski slopes, skating rinks, public swimming pools, shooting ranges, etc.

# Questions