



Letchworth

GATEWAY VILLAGES INITIATIVE

EXECUTIVE SUMMARY

2017 Visitor Survey
Findings + Strategic
Directions

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EXECUTIVE SUMMARY

Every year, over 700,000 visitors pass through our region to visit one of New York's top destinations—Letchworth State Park. As gateways to the park, our communities have an important role to play in providing a quality visitor experience. In turn, a vibrant tourism industry improves the quality of life for local residents and fuels economic growth by making our communities more attractive to potential employees and businesses.

In response to this opportunity, the Villages of Perry, Mount Morris and Geneseo joined forces in 2017 to establish Letchworth Gateway Villages (LGV) a municipal collaboration designed to catalyze economic growth and new tourism-related market opportunities for the communities that provide access and services to Letchworth State Park visitors.

As a first step towards better understanding how these three communities can maximize economic opportunities related to Letchworth State Park's visitor market, LGV retained the services of The Harbinger Consultancy, a consulting group with over 15 years experience in economic impact analysis and sustainable tourism development for gateway communities of national parks and other public lands. Over the past year, LGV has worked with Harbinger to collect data, conduct research and analysis to better understand the area's visitor market, identify strategic market segments and the most promising tourism-related market opportunities that align with our regional strengths.

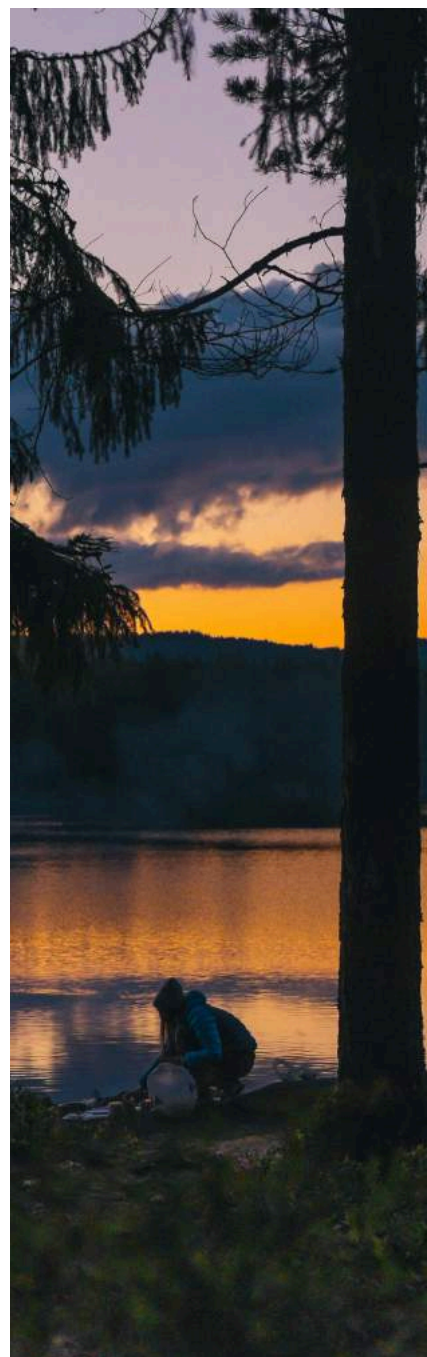


Photo: Andreas-Ronningen

"I love the area and warm friendly people. Love that Geneseo is a college town that offers activities. Letchworth is a natural gem that I always visit in the area."

CORE QUESTIONS GUIDING THIS WORK:

- 1) How can our communities more effectively tap the Letchworth State Park visitor market to get travelers to stay and spend money here?
- 2) What are the economic opportunities related to tourism in Letchworth's gateway communities?
- 3) What can LGV help catalyze in three years that will advance the economic potential of the region?

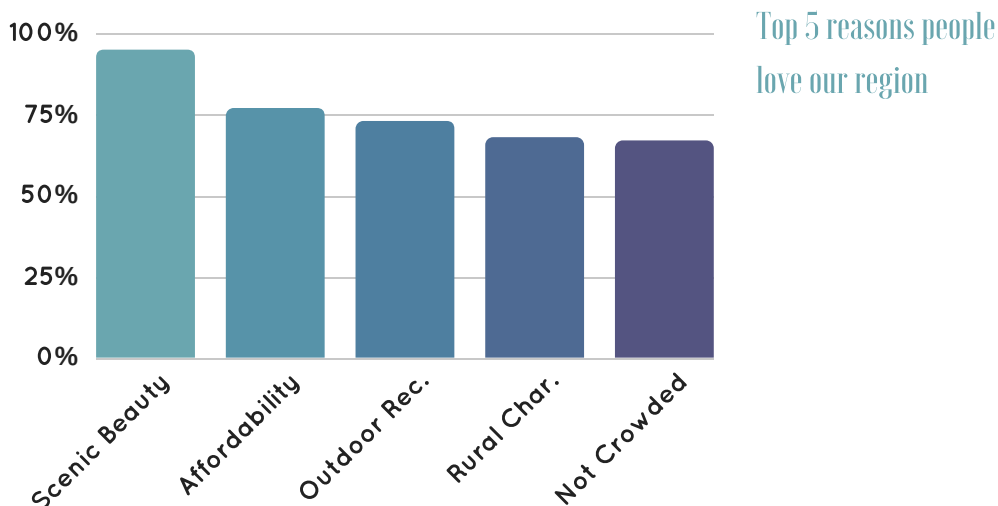
WHO IS THIS REPORT FOR?

This report is intended to provide municipal leaders funding the LGV initiative with data and insights to support strategic decision-making and market improvements in Perry, Mount Morris and Geneseo. While the report is intended for these three communities the insights and recommended actions cut across multiple areas and stakeholder groups. As such some recommended actions will require collaboration, coordination and resources beyond the Letchworth Gateway Villages Initiative for implementation.

SUMMARY OF FINDINGS

Baby boomers from Western New York constitute the largest visitor segment

Visitors coming to the region are typically day-trippers from Western New York, aged 50 years and older, and earn between \$49,000 and \$100,000. The majority are not new visitors to the region – 63% of people had visited the area before and 58% cited previous visits as the primary reason for knowing about the park and surrounding communities.



Letchworth State Park, family and SUNY Geneseo are the area's main draws

Visitors primarily come to the area to visit Letchworth State Park, family or attend a SUNY Geneseo-related event.

Letchworth State Park is an important economic driver

Visitors spend on average \$45 per person/day as day-trippers and \$96 per person/day as overnight visitors. With an average of 750,000 visitors per year, **the park generates an estimated \$51 million in visitor spending in the local area.** According to research conducted by Parks and Trails New York, Letchworth State Park **visitor spending supports 591 jobs** in the local area and **\$20 million in labor income.**⁽¹⁾

Our regional assets and current trends in travel and tourism are strongly aligned

Right now there is strong alignment between our regional assets (e.g. agriculture and scenic beauty) and market trends like food tourism, sustainability, wellness and adventure travel that make this an opportune time to pursue sustainable tourism as a regional economic development strategy.

(1) Garrett-Peltier, Heidi, 2017. "The Economic Benefits of the New York State Park System." Prepared for Parks and Trails New York by the Political Economy Research Institute.

Top 5 Improvements Needed

- 1) Stores open weekends, evenings & late night
- 2) Local cuisine & farm-to-table restaurants
- 3) Maps of hiking & walking trails
- 4) Cultural events
- 5) Accommodation options

KEY CHALLENGES

An aging visitor market

The majority of visitors coming to Letchworth and surrounding communities are repeat visitors, 50 years of age and older. Attracting new and younger visitors to the area is not only necessary for sustaining future visitation, but also to stimulate future growth by exposing our area to new residents and businesses.

Needed amenities to attract and retain visitors in Letchworth's gateway communities

Getting visitors to stay longer in our communities is important for maximizing economic opportunity. Survey respondents cited a number of amenities for improvement that could encourage longer visitation and enhance the visitor experience.

A gap between where visitors seek information and where our businesses market themselves

Three-quarters of survey respondents use the Internet to plan their travel and make decisions about where to eat, sleep and explore, with 50% of survey respondents also citing consumer review sites like TripAdvisor.com and Yelp as important sources for travel information. Despite visitors' use of these sources, less than 15% of 270 tourism-focused businesses across the three communities use TripAdvisor, less than 35% use Yelp and less than 60% can be found in a Google search. Improving local businesses' capacity to use digital marketing remains critical for improving their visibility to visitors coming to the area. (2)

(2) Based on a review of 270 tourism-related businesses across Perry, Mount Morris and Geneseo. Businesses defined as restaurants (non-chain/corporate), cafes, and specialty retail. See table 10.

KEY OPPORTUNITIES & RECOMMENDATIONS

While challenges exist, there are a number of opportunities in the near term that businesses, tourism promotion groups and leaders in the gateway communities can pursue to address these issues. Many of these recommendations cut across multiple areas and will require collaboration, coordination and funding beyond the Letchworth Gateway Villages Initiative for implementation.

1) Market close-to-home getaways to Western New York neighbors, particularly in Monroe (Rochester) and Erie (Buffalo) counties. Three-quarters of visitors to the area are from New York State. Of New York visitors, 68 percent come from Western New York, with the highest level of visitation from Monroe and Erie counties. Twenty-five percent of Erie and Monroe County visitors stay at least one night, which suggests that promoting overnight getaways could be effective, even in these nearby markets.

(2) Promote and help build traditions among family and friends. A quarter of all visitors are here primarily to visit friends and family. Eight of ten survey respondents had visited the area before. Catering to, continuing, and celebrating traditions such as family reunions, alumni events and anniversaries may help perpetuate the cycle of repeat visitation already so important in our area.

3) Develop a regional destination brand that better connects local businesses and communities with Letchworth State Park. With attractive places and quality of life at a premium in today's economy, gateway municipalities have a special opportunity to develop a regional brand identity anchored to the park and the region's natural assets that appeal to high-value market segments identified in this analysis (e.g. hiking, biking, local food, craft beverages, rural arts and culture, unique history).

The area's proximity to urban markets in Rochester and Buffalo with growing numbers of Millennials also constitutes an opportunity to attract younger market segments that can enhance the region's future economic sustainability.

Numbers to Guide Action

3 of 4

visitors come from New York State, most are from Western NY

1 of 4

visitors come primarily to visit friends and family

Numbers to Guide Action

2 of 3

of events that brought visitors to the area were SUNY Geneseo parent/student events

3 of 4

of visitors use general Internet research when traveling or trip planning

2 of 5

of visitors rely on word of mouth and local recommendations for travel and trip planning

4) **Promote accommodations, activities, and itineraries to SUNY Geneseo parents.** Two-thirds of the events that brought visitors to the area were SUNY Geneseo parent/student events. Interviews conducted with families during orientation suggest that parents looking for accommodations are not aware of lodging options and other businesses in communities a short drive away from Geneseo.

5) **Pay attention to changes visitors want to see.**

Among those with the strongest preferences for upgrades were visitor segments this area would likely want to attract more attention from—those with high household incomes, younger visitors, and visitors from Monroe and Erie counties. Key amenities these groups cited for improvement included more convenient store hours, local cuisine / farm-to-table options and improved accommodation. Supporting and incentivizing these changes will require collaboration and resource coordination among municipalities, main street associations, Chambers of Commerce and Tourism and County Economic Development.

6) **Reach out to visitors through the information channels they use.** Three-quarters of visitors use general Internet research when traveling or trip planning. Other highly ranked sources included word of mouth and local recommendations (63%) and consumer review sites like Yelp or TripAdvisor (50%). Google, Facebook and other digital and social media marketing could help businesses and the park reach new visitors, particularly younger visitors. Enhanced familiarization and frontline staff trainings and information sources could help businesses improve word-of-mouth marketing to visitors.