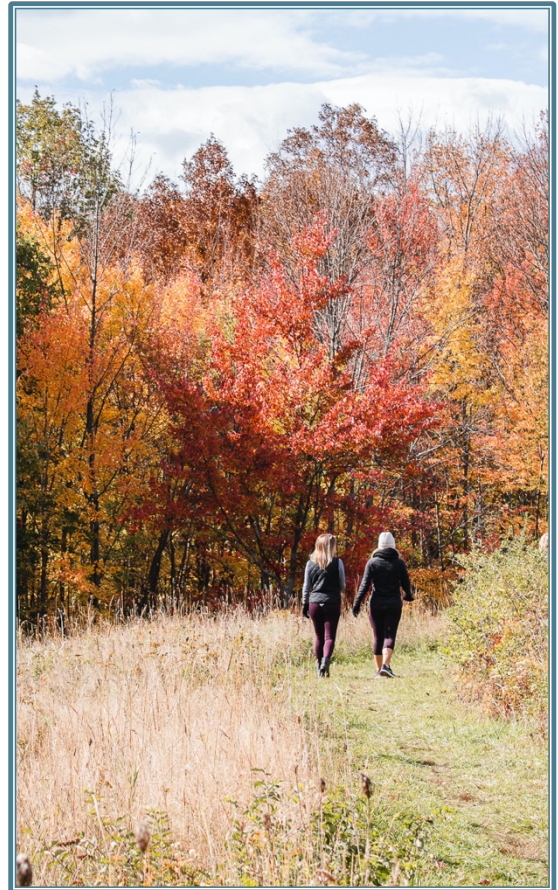




Genesee Valley Trail Towns 2021 Visitor Survey Findings



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Comments from visitors

“Beautiful, quiet and unspoiled, agricultural get away spot!”

“Friendly staff all over here.”

“Love the nature & local feel.”

“The Genesee Valley Greenway has improved nicely, especially in the last five years. I like the addition of break areas, trail improvements, and the Duggan Creek picnic area. Thank you!”

Cover photos clockwise from top left: Parked bicycles in Hume • Walkers in the Wesley Nature Preserve (Nina Piccini photo) • Cuba Garlic Festival

Executive Summary

In 2021, the Genesee Valley Trail Town initiative launched, with the aim of helping to build economic vitality and resilience in this rural region through outdoor recreation. As part of the research agenda that forms the baseline for this collaboration, we conducted a visitor survey to learn more about the Genesee Valley as an outdoor recreation destination and about our region's visitors.

Our 2021 Trail Town survey built on, and asked many of the same questions as, a 2017 visitor survey conducted by Genesee Valley Trail Town partner, Letchworth Gateway Villages (LGV).

COVID-19 and Survey Findings

The summer of 2021 was the second year of the global COVID-19 pandemic, which affected traveler behavior in ways that we do not fully understand. The pandemic also complicates making apples-to-apples comparisons between our 2021 visitor data and the 2017 Letchworth Gateway Villages survey findings. Differences in how survey responses were collected and the geographical reach of the two efforts also may have had an impact.

Our 2021 survey attracted an older, more affluent visitor sample than did the 2017 survey. In 2021, visitors reported higher trip expenditures and were more likely to stay overnight. Summer visits were substantially longer than in 2017. In 2021, visitation was even more strongly concentrated from Western New York than it was in 2017. COVID may have played a role in some or all of these variations.

Because of closures and labor shortages, the ongoing impacts of the pandemic masked some of the progress that Genesee Valley communities had made since the 2017 survey, especially in growing restaurants and other visitor-service businesses. This likely influenced 2021 survey findings.

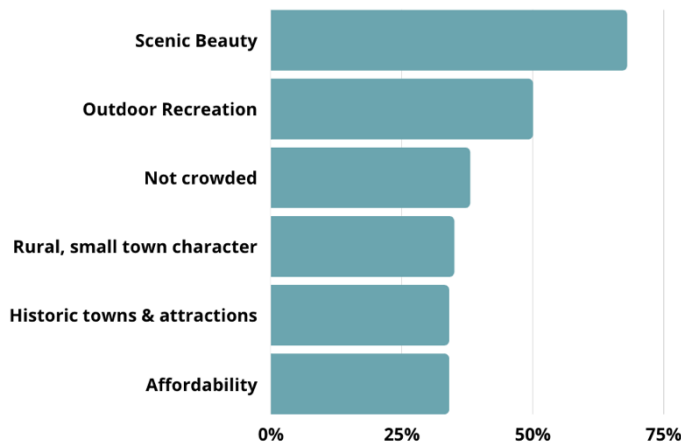
Key Findings

Visitors understand the Genesee Valley as an outdoor recreation destination, although recreation is the primary motivator for only 18 percent of nonlocal survey respondents. Nearly all respondents (94%) reported having participated in outdoor recreation on their most recent trip to the Genesee Valley.

Visitors coming to the region are typically from Western New York, aged 50 years and older, with a household income topping \$100,000. The majority are not new visitors to the region – 57% of people had visited the area before and 42% cited previous visits as the primary reason for knowing about the Genesee Valley. While visitors from Western New York are predominantly day-trippers, overnight visitors outnumbered day visitors in our overall sample of nonlocal visitors.

TOP SIX FACTORS IN DECISIONS TO VISIT THE GENESEE VALLEY

% "very important" responses



Survey respondents overwhelmingly rated scenic beauty (68%) as the most important characteristic in their decision to visit the Genesee Valley, followed by outdoor recreation. The region's uncrowded, easy accessibility; rural, small-town character; historic main streets and historical and cultural attractions; and affordability were rated highly by over a third of respondents.

Outdoor recreation tourism is important to the Genesee Valley economy. Visitors spend on average \$100 per person/day as day-trippers and \$142 per person/day as overnight visitors. The New York State Office for Parks, Recreation and Historic Preservation reports Letchworth State Park hosted 903,000 visitors in 2021, while visitation to the Genesee Valley Greenway was estimated at nearly 79,000. Using the averages for visitor spending and length of stay reported in our survey to produce estimates, these visitors alone spend more than \$277 million in the local area.

The Genesee Valley has a loyal visitor base. Three-quarters of visitors responding to our survey had visited before.

First-time visitors are a worthwhile market. They are more likely to stay overnight and pay for lodging when they do, than the average visitor. Six of ten said they would absolutely consider returning to the Genesee Valley for another visit.

Word of mouth is an important information source both in how visitors become aware of the Genesee Valley as a destination and for trip planning. Nearly 50% of first-time visitors learned about us through word of mouth.

Visitors are generally satisfied with their experience in the area, and what is already on offer, as evidenced by high repeat visitation, willingness to consider future visits, and overall satisfaction rankings for key traveler amenities.

PRIORITIES FOR IMPROVEMENT



Top items cited for improvement included farm-to-table and local cuisine options; stores open weekends, evenings and late night; maps of hiking and walking trails; cultural events; and bicycle-friendly facilities, trails and roadways.

Recommendations for Action

1) Take scenic beauty seriously

More than two-thirds of visitors (68%) identify scenic beauty as a very important factor in their decision to travel to the Genesee Valley, and 34 percent say that the region's rural, small-town character is very important. As development pressures mount in the Genesee Valley, including to site large-scale solar power generation facilities, Trail Towns and other communities should actively plan to protect the Genesee Valley's scenic resources.

2) Guide visitors to high-quality experiences

Six of ten survey respondents reported visiting more than one Trail Town community during their most recent visit, a finding that underscores the value of collaborative promotion and of equipping people who provide visitor services with information they need to guide visitors to the high-quality experiences the Valley offers. ExploreGeneseeValley.com provides the backbone for both of these imperatives.

3) Develop a Genesee Valley Trail Town ambassador program.

Another priority is expanding the pool of local residents and outdoor and hospitality industry employees who are knowledgeable about ExploreGeneseeValley.com and the Trail Town program and understand the area's visitor services, attractions and culture so they can offer travelers friendly interpretation and guidance in trip planning and while visiting. In our survey, visitors identified word of mouth as an important source of information for becoming aware of the Genesee Valley as a destination (35%) and word of mouth and local recommendations as a resource for trip planning before and during travel (58%).

4) Pay attention to first-time visitors — especially from Western New York

First-time visitors are more likely than all visitors to be here for a vacation or short getaway, and to stay in paid lodging at a hotel, inn or B&B. First-timers are under-represented among Monroe and Erie county visitors, the Genesee Valley's most accessible and important visitor market. Promoting itineraries and trip packages for short getaways may appeal to outdoor recreation enthusiasts and other potential visitors, as could promoting events and developing new ones, including with a focus on outdoor recreation. Forging more partnerships with influencers and tour guides in Western New York is another approach that could encourage more new visitors.

5) Pay attention to changes visitors want to see

Priorities for improvement found in our 2021 Trail Town visitor survey are substantially the same as those identified in Letchworth Gateway Villages' 2017 survey. A successful focus on encouraging new business openings in LGV communities since 2017 is an example of what can result from taking these visitor priorities seriously. The 2017 LGV survey report offers a discussion of several of these top priorities for improvement, providing context from business

inventories, intercept interviews and other sources. Trail Town community business audits provide another resource for improving local business practices to better meet travelers' needs.

“Definitely need to have more shopping and restaurants open on the weekends earlier than 4 p.m.”

The 2021 survey flags restaurants featuring local cuisine and farm-to-table produce as the top visitor priority for improvement. In 2019, LGV collaborated with the Culinary Tourism Alliance to produce a Food Tourism Assessment for the Genesee Valley. The assessment provides municipal and county leaders with data and insights to support strategic decision-making and market improvements to boost the region's potential as a heritage tourism destination.

6) Continue developing, refining and using the Genesee Valley brand

The regional Genesee Valley identity that has emerged over the past few years is strongly based in outdoor recreation, shared natural resources, and a rural landscape of agriculture and small, friendly communities. ExploreGeneseeValley.com is a strong representation of that brand, which will be continued through the development of a new Genesee Valley Trail Town logo and marketing materials and design guidelines and best practice for signage, wayfinding, building facades, and streetscapes for the network of Trail Towns. Widespread and consistent use of these brand resources will help the Genesee Valley establish a clear identity for visitors and potential visitors.

Making better physical connections between Trail Towns and existing recreational resources as well as those yet to be completed (e.g., the Genesee Valley Greenway) or built, is a clear priority for a region aspiring to solidify its identity as an outdoor recreation destination. Trail Town Action Plans are a good starting point for identifying related specific projects.

Overview

In 2021, the Genesee Valley Trail Town initiative launched, with the aim of helping to build economic vitality and resilience in this rural region through outdoor recreation. As part of the research agenda that forms the baseline for this collaboration, we conducted a visitor survey to learn:

- Who visits our region?
- What attracts them to our area?
- What outdoor recreation activities and destinations are popular?
- How long do they stay and how much do they spend while they are here?
- What can we improve to enhance the visitor experience?
- What is the best way to communicate with visitors and potential visitors?

Our 2021 Trail Town survey built on, and asked many of the same questions as, a 2017 visitor survey conducted by Genesee Valley Trail Town partner, Letchworth Gateway Villages.

Survey Background

From June through mid-October 2021, the GVTT visitor survey was deployed online. The survey included 25 questions accessed through a hyperlink and QR code promoted on rack cards and posters displayed in the ten Trail Towns, the Genesee Valley Greenway, Letchworth State Park, Genesee Country Village & Museum, and other area businesses and attractions. The survey was also widely promoted on social media.

“The beauty of this area and the kindness of the people are exceptional.”

The survey targeted visitors coming to the area from a 25-mile radius and beyond.

These findings are based on 532 responses collected from June through mid-October 2021 to capture data during the peak tourism season.

Survey Design

This survey was designed to learn more about visitors to the Genesee Valley, their behavior and preferences, especially as they relate to outdoor recreation and the ten Genesee Valley Trail Town communities. Nearly every survey respondent reported participating in some form of outdoor recreation during their Genesee Valley visit(s). The most-often noted activity was hiking or walking, with 98 percent of visitors indicating participating.

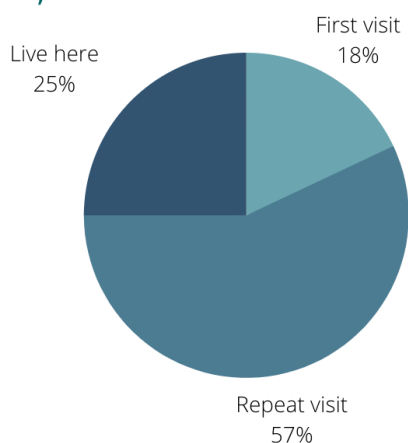
Forty-two percent of respondents accessed the survey through Facebook or other social media promotion. The second most frequent place respondents learned about the survey (20%) was in a Genesee Valley community, where surveys were promoted on rack cards and posters displaying QR codes and hyperlinks. Twelve percent of respondents found out about the survey at Letchworth State Park and at Genesee Country Village and Museum. Smaller numbers of

respondents learned about the survey at an event, ExploreGeneseeValley.com, and Genesee Valley Greenway State Park.

Survey Findings & Market Segment Insights

This report focuses on key findings from the 399 responses we received from nonlocal visitors, who were our target market. We defined “local” as Allegany, Genesee, Livingston and Wyoming (NY) counties, and “nonlocal” as people who live outside these core Genesee Valley counties. (Even though Wheatland/Scottsville, our northernmost Trail Town community is in Monroe County, the majority of the county’s population lives in the northern portion of the county and are Genesee Valley visitors.)

LOCAL, FIRST-TIME AND REPEAT VISITORS



In analyzing its 2017 survey results, Letchworth Gateway Villages did an in-depth breakdown of five visitor segments representing traditional, high-value and under-represented parts of the potential visitor market. Our 2021 analysis offers some specific market segment insights, particularly focusing on first-time visitors and visitors from nearby Monroe County (Rochester) and Erie County (Buffalo), but does not replicate the in-depth 2017 analysis.

“Regardless of the amenities, the beauty always brings me back. I stay longer with a special reason and relaxation.”

COVID-19 and Survey Findings

The summer of 2021 was the second year of the global COVID-19 pandemic, which affected traveler behavior in ways that we do not fully understand. The pandemic also complicates making apples-to-apples comparisons between our 2021 visitor data and the 2017 Letchworth Gateway Villages survey findings. In addition, there were differences in how survey responses were collected and the geographical reach of the two efforts.

Our 2021 survey attracted an older, more affluent visitor sample than did the 2017 survey. In 2021, visitors reported higher trip expenditures and were more likely to stay overnight. Summer visits were substantially longer than in 2017. And 2021 visitation was even more strongly concentrated from Western New York. COVID may have played a role in some or all of these variations.

While there are differences among the “typical” survey respondent in 2021 and 2017, and differences in the questions asked, the findings of the two surveys are remarkably consistent, especially when it comes to how visitors learn about the Genesee Valley, what they value about the area, and the kinds of improvements they would like to see to make visiting here even better.

The ongoing impacts of the pandemic masked some of the progress that Genesee Valley communities had made since the 2017 survey, and likely influenced 2021 survey findings. For example, when the 2021 survey was deployed, it would have been difficult for visitors to see the strides the area had made in adding locally owned restaurants since 2017. Many restaurants had closed due to pandemic restrictions, and as they reopened in the summer of 2021, labor shortages forced many to close again or operate on a limited schedule. Visitor perceptions and the priorities for improvement they identified—including restaurants serving local food and businesses open evenings, late nights and weekends—may have been influenced by COVID-driven limitations.

Key Findings

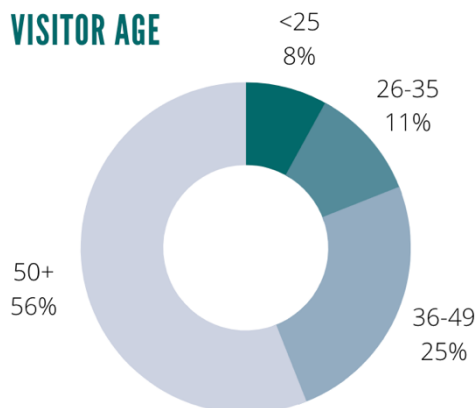
Visitor Market

Who are our visitors?

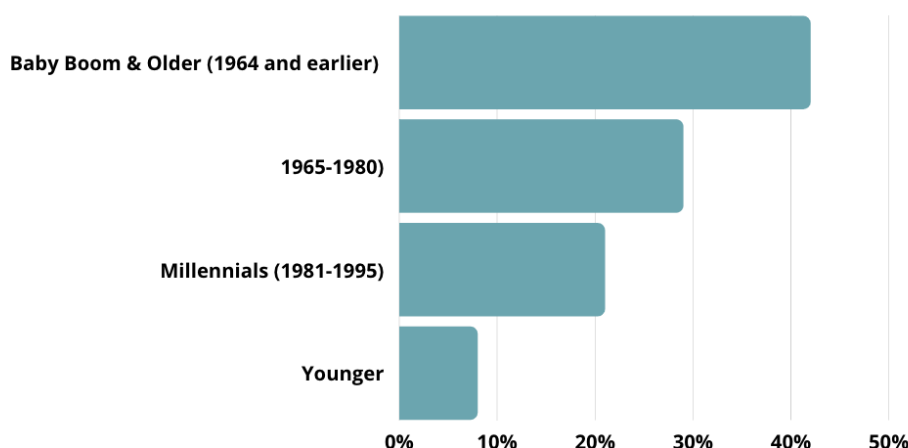
Overall, the area attracts mature, affluent visitors, traveling without children. The average age of survey respondents was 62 years old. The majority of respondents (56%) were people aged 50 years and up. The second largest cohort of visitors included people aged 36-49 (25%).

Baby Boomers (42%) were the most-represented generations among nonlocal survey respondents, followed by Gen X (29%).

VISITOR AGE



SURVEY RESPONDENTS BY GENERATION



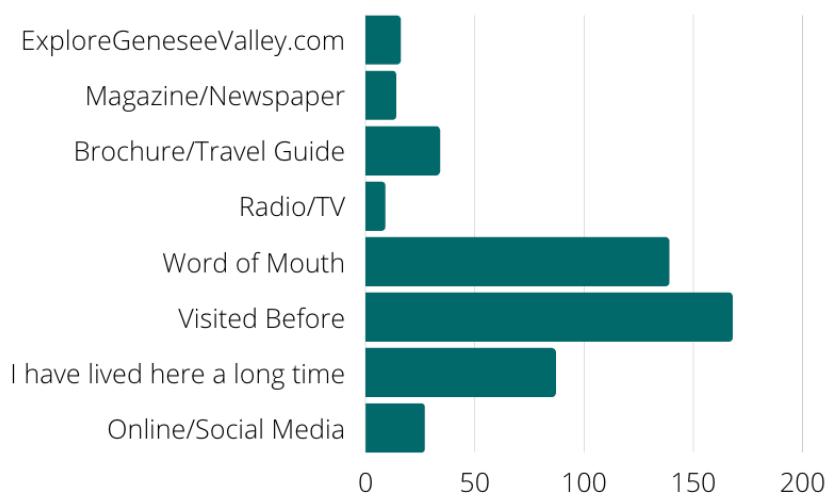
Visitors are generally affluent. Nearly half (46 percent) of visitors who answered this question reported annual household incomes greater than \$100,000, while 36 percent reported household incomes between \$49,000 and \$100,000.

HOUSEHOLD INCOME



Fifty-seven percent of respondents had visited the Genesee Valley before. Forty-two percent cited previous visits as the primary reason for knowing about the park and surrounding area, while another 22% noted that they knew about the Genesee Valley because they had lived in the area for a long time. These respondents were typically from Monroe County or Erie County, where there is a strong affinity for, and familiarity with, this area.

HOW DID YOU LEARN ABOUT THE GENESEE VALLEY?



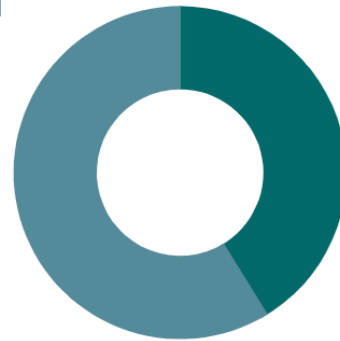
"I've been visiting family here for years. You need to promote all these wonderful things you have to offer. All I've ever known about is Letchworth and the Finger Lakes and Angelica!"

The majority of respondents were traveling with family, a partner or spouse (66%). Of the visitors traveling with family, only about a quarter were families with children under the age of 18 (27%). Eight percent of visitors reported traveling alone.

Most visitors surveyed spent at least one night in the Genesee Valley (59%) versus taking a day trip (41%). First-time visitors are disproportionately likely to be overnight visitors (76%). Out-of-state and international visitors are, not surprisingly, also much more likely to be overnight visitors (87%) than the sample as a whole.

DAY & OVERNIGHT VISITORS

Overnight Visitors
58.8%

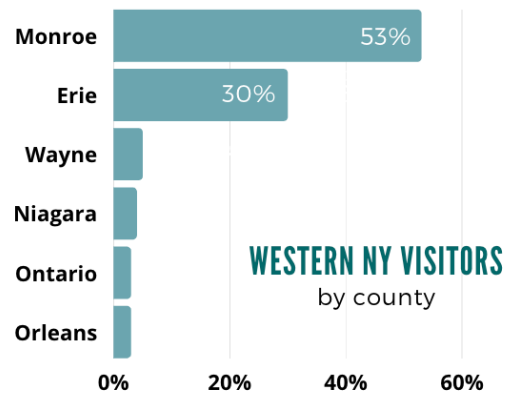
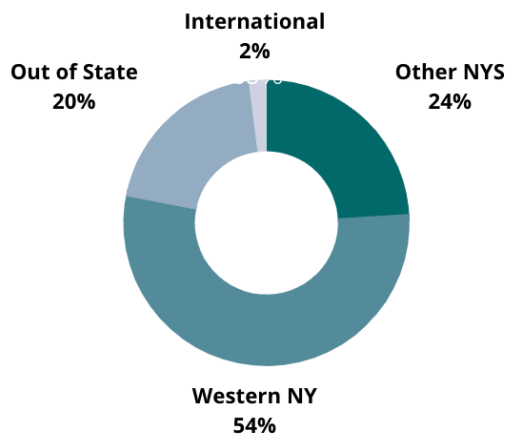


Day Visitors
41.2%

Where are visitors coming from?

Seventy-eight percent of survey respondents visiting the region were from New York State. Of New York visitors, 70 percent came from Western New York, with the highest level of visitation from Monroe and Erie counties. For people coming from out of state, the largest share of visitors came from Pennsylvania, followed by Florida, Virginia, Ohio and New Jersey.

WHERE ARE VISITORS FROM?



Why Are Visitors Coming Here?

The top reasons visitors cited for visiting the region included visiting friends and family (23%), a short getaway (22%), attending an event or visiting a museum or heritage site (21%), outdoor recreation (18%), and vacation. First-time visitors are more likely to be here for a short getaway (34%) or vacation (25%) than the sample as a whole. (The prevalence of the “event, museum or heritage site” response may be partially due to the extensive survey-promotion efforts of the Genesee Country Village and Museum.)



Nearly every survey respondent (94%) has participated in outdoor recreation while visiting the Genesee Valley, even though it was the primary travel motivation for fewer than one in five visitors. Nearly two-thirds (63%) of visitors surveyed spent time in Letchworth State Park during their most recent visit. New York’s Finger Lakes region (28%) was the second most frequent outdoor recreation destination.

Among noted events, the Genesee Country Village and Museum events and the Letchworth Arts and Craft Show and Sale were the most frequently mentioned. Houghton College and SUNY Geneseo also garnered several mentions each.

Visitor Behavior

Length of stay

Overnight visitors stay significantly longer in the summer (8.2 nights) than in the fall (2.2 nights). The average length of stay for all overnight visitors is four nights. Note: stays longer than 30 nights were removed from the sample. Even though there is a relatively small number of these (nine of 401 out-of-town responses), including these people, who could be considered part-time residents, skews the average length of stay.

AVERAGE LENGTH OF STAY

Summer Visitors

8.2 nights



Fall Visitors

2.2 nights



All Visitors

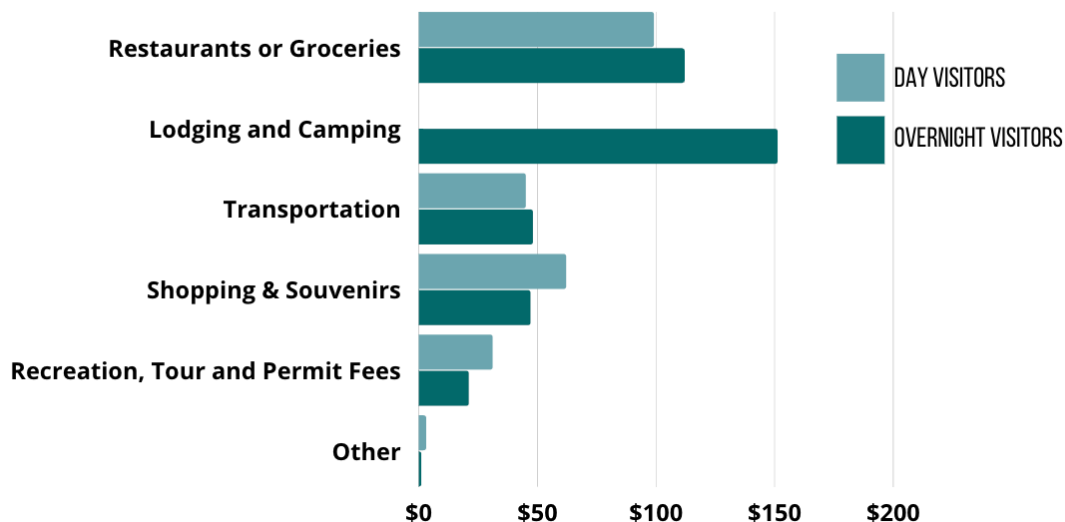
4 nights



Average visitor spending

Visitors were asked to provide estimates of their daily spending across five key categories. The results were averaged across a sample of 382 visitors who responded to this part of the survey. Expenses on average covered a group or family of 2.6. Overall, visitors spent the most on restaurants and groceries, and on lodging and camping.

DAILY VISITOR SPENDING PER PERSON BY CATEGORY



Visitors spend, on average, \$100 per person/day as day-trippers and \$142 per person/day as overnight visitors. Very few visitors travel alone, however, so it is perhaps more useful to think in terms of spending per visitor party. Day visitor parties spend, on average, \$239 per visit. Overnight visitor parties average \$1,520 per trip, staying for an average of four nights. Average per-trip spending for overnight parties is higher in the summer than in the fall, in large part because of longer summer average trip durations.

HOW MUCH DO VISITORS SPEND?

OVERNIGHT VISITOR PARTIES

\$380/day \$1,520/trip
4 nights average

DAY VISITOR PARTIES

\$239/trip

AVERAGE PARTY SIZE



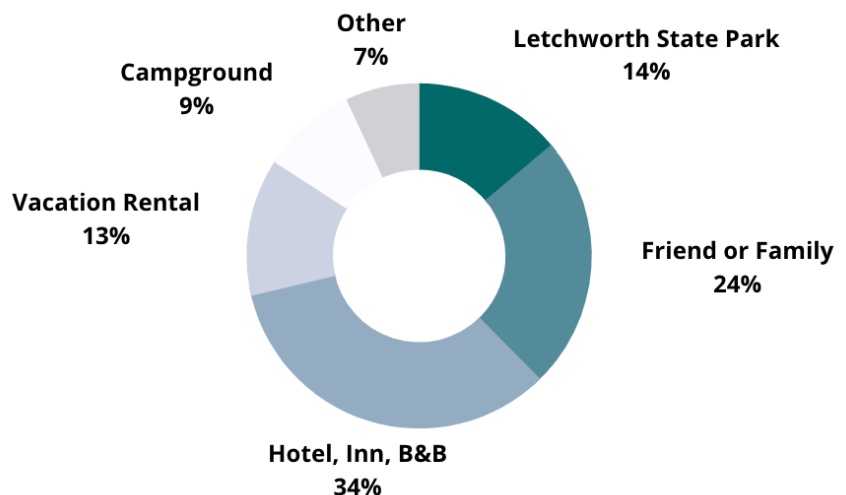
2.4 day visitors; 2.7 overnight

“Love the small towns. Love the farms selling local meat, bakeries, gift shops.”

Where overnight visitors stay

Most visitors (34%) stay in hotels, inns or B&Bs outside the park when visiting the area. Twenty-four percent stay with friends and family. Letchworth State Park (Glen Iris Inn, park campgrounds or special housing e.g., Maplewood Lodge, Chalet, etc) was the third most cited place to stay (14%). “Other accommodation” in the comments sections frequently referred to summer cottages.

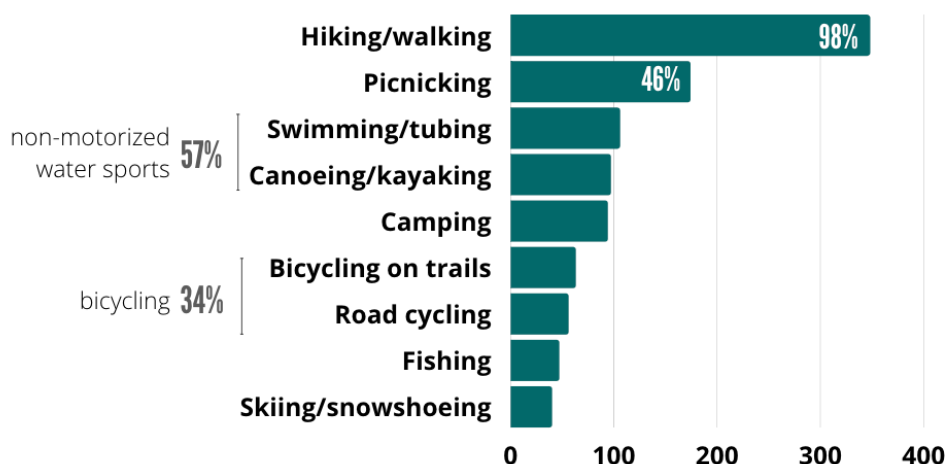
WHERE DO OVERNIGHT VISITORS STAY?



Outdoor Recreation Participation and Destinations

As noted above, 94% of survey respondents reported having participated in outdoor recreation on their most recent trip to the Genesee Valley. We asked visitors which outdoor recreation activities they had participated in while visiting the Genesee Valley, whether on this trip or any previous outing. Hiking and walking topped the list with 93% of those reporting outdoor recreation participation identifying this as one of their activities. The next most common activity was picnicking (46%), followed by swimming or tubing (28%), canoeing or kayaking (26%) and camping (25%). Bicycling on trails (17%) and roads (15%) ranked next in popularity.

VISITOR PARTICIPATION IN OUTDOOR RECREATION ACTIVITIES

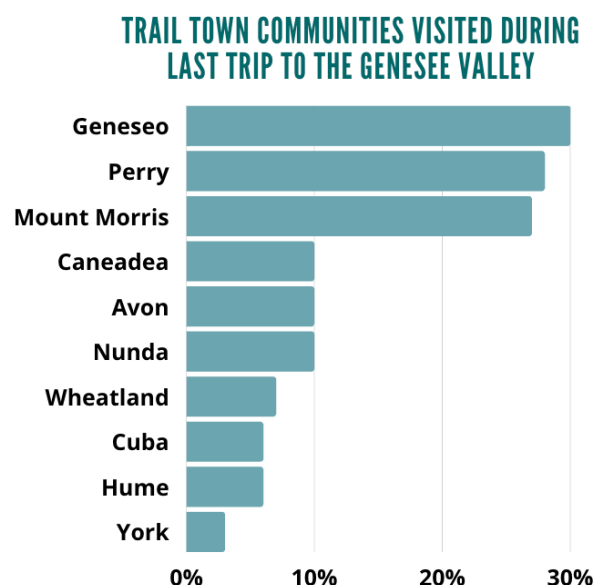


Nearly two-thirds (63%) of visitors surveyed spent time in Letchworth State Park during their most recent visit. New York's Finger Lakes region (28%) was the second most frequent outdoor recreation destination, followed by the Genesee Country Village & Museum (21%), Genesee River (17%), Finger Lakes Trail (14%), Genesee Valley Greenway State Park (13%), Conesus Lake (13%), and Silver Lake/Silver Lake State Park (11%). Linwood Gardens was frequently mentioned as another destination.

"The Genesee Valley is a beautiful outdoor destination and would benefit greatly with more awareness of the Genesee Trail."

Trail Towns Visited

Our survey asked visitors to indicate which of the Genesee Valley Trail Town communities they spent time in on their most recent visit. Six of ten survey respondents who answered reported visiting more than one of these communities.



The communities visited most by survey respondents are Geneseo (30%), Perry (28%) and Mount Morris (27%) — the three original Letchworth Gateway Villages that have been collaborating on tourism promotion longest. Avon, Caneadea and Nunda were each noted by 10% of visitors.

These response patterns may be partly a function of the relative success of different communities' efforts at survey promotion. This may speak, in large part, to changes fostered by LGV's collaborative efforts, including greater awareness of the importance of tourism among the business community and overall improvements in businesses' digital presence in Geneseo, Perry and Mount Morris.

ExploreGeneseeValley.com and direct LGV network building and promotional efforts, especially in Rochester, have expanded awareness among visitors of these three original Letchworth Gateway Villages communities that have been working in collaboration for several years. This likely played a role in the high proportion of survey respondents who reported visiting these communities, highlighting the importance of continued collaboration, network building and ambassadorship.

What Visitors Appreciate About the Genesee Valley

Visitors were asked to rate by level of importance eight characteristics of our region: scenic beauty, outdoor recreation, small town/rural character, proximity to urban centers (e.g., Rochester and Buffalo), affordability, historic main street districts, farmstands/markets and local food, and uncrowded/accessible feel.

Survey respondents overwhelmingly rate scenic beauty (68%) as the most important characteristic to their decision to visit the Genesee Valley, followed by outdoor recreation (50%).

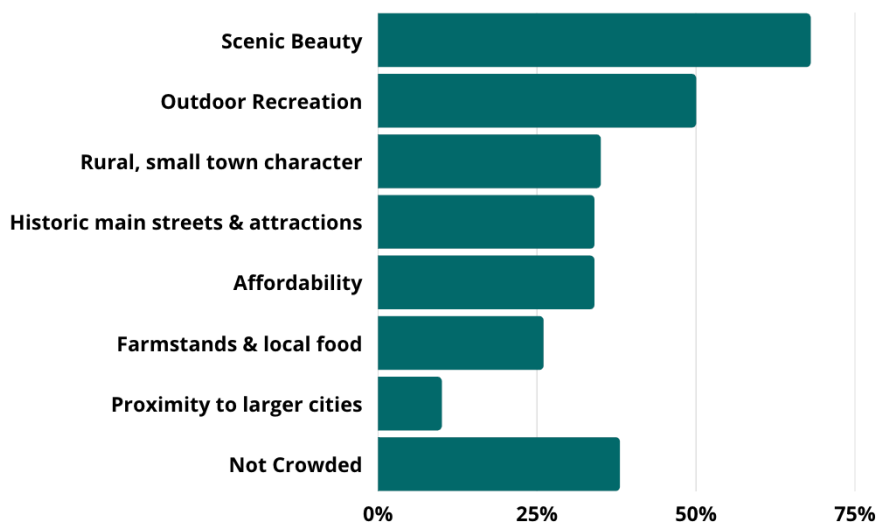
*"I love the rural
quality of this area!
So beautiful and
very relaxing."*

Respondents were more divided about the importance of the uncrowded, easy-to-access nature of the area, rural character, historic main streets, and affordability, but all garnered "very important" rankings from 1/3 or better of respondents, with similar percentages ranking these characteristics as "somewhat important." Farmstands and local food was rated

as very important by 26%, and somewhat important by 33%. Proximity to urban centers was the least highly ranked, garnering 10% “very important” responses, and 45% “not important,” despite the prevalence of Monroe and Erie County residents among visitors.

WHEN DECIDING TO VISIT THIS AREA, HOW IMPORTANT WERE THESE FACTORS?

% of “very important” responses

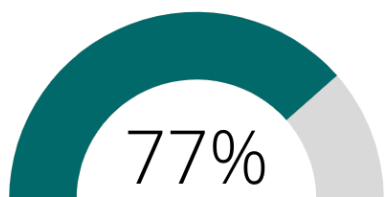


In the “other comments” section, respondents frequently cited the friendliness of locals, even calling out individual business owners, guides or staff who do a great job. Similarly, many visitor comments recognize outstanding food/beverage, lodging and visitor attractions. Letchworth State Park gets high marks for maintenance and upkeep in comments, and switching the venue for the Letchworth craft show from the park to Perry garnered overall positive remarks.

“The Mt. Morris Dam tour was excellent, and the tour guide was extremely informative.”

HOW LIKELY ARE YOU TO RETURN FOR ANOTHER VISIT TO THE GENESEE VALLEY?

% of “absolutely” responses
(10 on a scale of 1 to 10)



Seventy-seven percent responded “absolutely” (10 on a scale of 1 to 10) when asked if they would return for another visit to the Genesee Valley. This response was less common among first-time visitors (60%), but 83% ranked their likelihood of a return visit as 8, 9 or 10 on the 10-point scale.

How Can We Enhance Visitors' Experience?

Visitors were asked to rate 16 items about the Genesee Valley as needing improvement, not needing improvement, or not important to me. Options presented in the survey were taken from the 2017 Letchworth Gateway Villages visitor survey, with a handful of edited items to better reflect the Trail Towns' interest in outdoor recreation.

Overall visitors are generally satisfied with their experience in the area, and what is already on offer. Survey respondents gave parking the highest "no improvement needed" ranking at 73%. Also ranking highly on visitor satisfaction: online visitor information/central website; directional signage; maps of hiking and multi-use trails; and cultural events.

The top things people rated as not important included spa and wellness services (60%); local transportation options like ride-sharing services like Uber, bus shuttles, or taxis (55%); and guided tours (45%). High "not important" rankings do not mean that these factors are not important to anyone.

List of amenities offered for survey response

- Directional signage
- Online visitor information/central website
- Restaurants featuring local cuisine and farm-to-table produce
- Local wineries and craft breweries
- Specialty retail / souvenir shops
- Stores open weekends, evenings (after 6pm) and late night (after 10pm)
- Maps of hiking and multi-use trails
- Bicycle-friendly facilities, trails, roadways
- Outdoor recreation equipment and gear rental and repair
- Local transportation options - cabs, rideshare (i.e. Uber), shuttles
- Lodging options (e.g., hotel, B&B, Airbnb, "Glamping")
- Parking
- Guided tours
- Cultural events (e.g. festivals, beer/wine tastings, food tours)
- Live entertainment
- Spa / wellness services

"Specific day trip itineraries would be helpful, categorized by nature, wine, craft beer, small town, etc."

"Shops open on Monday would be nice...as long weekends tend to be Friday-Monday."

"Encourage more craft beverages and food places like creameries."

PRIORITIES FOR IMPROVEMENT



Top items cited for improvement included farm-to-table and local cuisine options; stores open weekends, evenings and late night; maps of hiking and walking trails; cultural events; and bicycle-friendly facilities, trails and roadways. Some items that ranked highly for visitor satisfaction (e.g., trail maps and cultural events) also showed up as priorities for improvement for high percentages of other respondents.

“Would like more detailed maps of hiking areas with mileage included to select an appropriate route—include hiking time and what parts are challenging vs flat hike.”

To determine which amenities are most important to visitors, we identified the items from the list of 16 that received the fewest “not important to me” responses, regardless of how survey respondents ranked their satisfaction with these items. Topping the list of most important amenities was maps of hiking and multi-use trails (11% “not important to me”) followed by restaurants featuring local cuisine and farm-to-table produce (12%) and parking (13%).



MOST IMPORTANT TO VISITOR EXPERIENCE

- 1 Trail maps
- 2 Restaurants featuring local cuisine and farm-to-table produce
- 3 Parking
- 4 Directional signage
- 5 Online visitor information/central website
- 6 Cultural events (festivals, beer/wine tastings, food tours)
- 7 Stores open weekends, evenings (after 6pm) and late night (after 10pm)

Other responses

The relevant comments noted in the “other” response category are included in Appendix B, clustered into categories for easier interpretation. The comments below were taken from responses to the final question on the survey: “Is there anything else you’d like to tell us?”

“I love kayaking. Please make the Genesee more accessible and provide maps of put-ins and take-outs. Absolutely beautiful river!!!”

“Please add at least one or two high-end farm to table restaurants at the Genesee Country Museum.”

“The signs on trails in parks when hiking are rare to not present at all. If more signs could be added in the parks and major trails, I feel like they would get used more and people would spend less time wandering through the woods wondering if they’re going the right way or if they accidentally turned onto an old logging road.”

“I love this area so much - love hiking. Would love for there to be more guided tours in different areas or at least more advertised guided tours.”

Communicating with Visitors

The primary ways survey respondents learned about the Genesee Valley was through previous visits to the area (42%) and word of mouth (35%). General familiarity with the area was also important, garnering a 22% response rate.

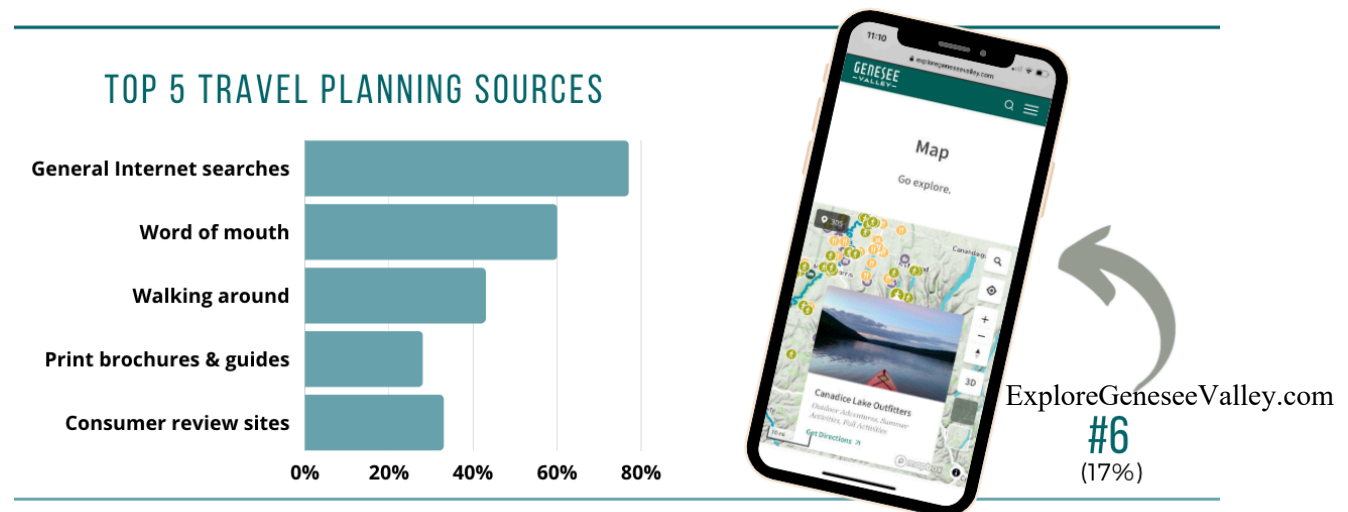
(We included “I have lived here a long time” as a response option because the 2017 Letchworth Gateway Villages survey had demonstrated the prevalence of visitors from nearby counties, many of whom visit the Genesee Valley again and again.)

Online and social media sources were mentioned in 27 comments.

“I would love to see historic interpretive signs or even museums which feature the Seneca Nation heritage as well as the canal history.”

When asked what sources visitors use when traveling or planning a trip, the majority (77%) cited general Internet research as a resource.

Other highly ranked sources included word of mouth/local recommendations (58%) and walking around at the destination (42%). Print brochures or visitor guides (39%) and consumer review sites such as Yelp or TripAdvisor (32%) rounded out the top sources. Seventeen percent of visitors used ExploreGeneseeValley.com to plan their trip.



“I live in Wyoming and grew up in Warsaw. I never knew this website [ExploreGeneseeValley.com] existed. I often stop and talk with people who are clearly passing through and offer them local travel destinations. It's equally important to familiarize locals with resources like this. I'd suggest also having resources in the new hotel in Warsaw as well as other local hotels to direct travelers to your website. Connect with local Airbnbs, as most provide resources to guests for local travel. I'm sure they would love having such a focused website to direct them to.”

Comparisons with 2017 LGV Survey Findings

As noted above, the COVID-19 pandemic may have changed traveler behavior in ways that we do not fully understand, and certainly affected business operations in the Genesee Valley. These changes introduce some variations in the context for the 2021 visitor data and the 2017 survey findings. There were also some differences in how survey responses were collected (e.g., the use of intercept surveys in 2017 and the broader geographic focus of the 2021 survey) that could drive differences. Even given that, it is interesting to note some of these differences and similarities.

Our 2021 survey attracted an older visitor sample than the 2017 LGV survey, with a larger proportion of both 50+ years and 36-49 year-olds. The basic gist, however, is similar. The Genesee Valley tends to attract an older visitor. The 2021 survey also reflected a more affluent visitor than in 2017, with a larger percentage of respondents reporting \$100,000+ household incomes (46% in 2021, 31% in 2017).

In 2021, more visitors stayed overnight (59%) than in the 2017 sample (48%). And 2021 visitation was even more strongly concentrated from Western New York (78% in 2021, 66% in 2017). COVID almost certainly played a role in this difference.

In the 2021 results, we found longer summer stays (8.7 nights vs 5.4 nights in 2017) and

“I really enjoyed the beauty of the area and the fact that it retains a nice atmosphere and not overly commercialized.”

higher per-visitor spending for both day visitors (\$100/day vs. \$45/day in 2017) and overnight visitors (\$142/day vs. \$96 in 2017).

While there are differences among the “typical” survey respondent in 2021 and 2017, and some differences in the questions each survey asked, the findings of the two surveys are remarkably consistent, especially when it comes to how visitors learn about the Genesee Valley, what they value about the area, and the kinds of improvements they would like to see to make visiting here even better.

“More non-food related options for rainy days would be nice. Our sunny day was great, but on the day it rained we struggled to find activities of interest that didn’t involve food, beer, or wine.”

Insights for Action

This visitor survey was one of several research and assessment efforts undertaken by the Genesee Valley Trail Town initiative in 2021 to collect baseline information at the beginning of the collaboration and to guide action priorities. The survey findings yielded insights that the Trail Town Alliance can use as it builds economic vitality and resilience in the region through outdoor recreation.

For additional insights, see the Letchworth Gateway Villages Initiatives *2017 Visitor Survey: Summary of Findings + Strategic Directions*, which offers a related set of recommendations based on the 2017 survey and a parallel research effort. In addition, the Trail Town 2022 Action Plans draw on a variety of resources including this 2021 visitor survey to identify action priorities for individual Trail Town communities.

Many of the recommendations suggested in this analysis of the 2021 Trail Town survey responses build on the foundation of collaboration set in motion by Letchworth Gateway Villages in 2017. LGV's visitor data and market research has helped shift the way municipal leaders, businesses, county economic development officials and community members understand market opportunities linked to tourism and outdoor recreation. In LGV's original communities (Perry, Mount Morris and Geneseo) the initiative has helped foster a growing number of municipal policies, county economic development and planning efforts and entrepreneurial ventures geared towards the region's outdoor recreation visitor market. These recommendations build on that solid foundation, and on progress that other Genesee Valley Trail Towns have made in similar arenas.

1) Take scenic beauty seriously

More than two-thirds of visitors (68%) identify scenic beauty as a very important factor in their decision to travel to the Genesee Valley, and 34 percent say that the region's rural, small-town character is very important. As development pressures mount in the Genesee Valley, including to site large-scale solar power generation facilities, Trail Towns and other communities should actively plan to protect the Genesee Valley's scenic resources. This means working with town boards, municipal planning departments, landowners, local businesses, tourism leaders and private land conservation organizations to map out the most scenic byways and make sure they are protected. Expanding and refining the inclusion of community-led, sustainable outdoor recreation tourism in comprehensive plans is another step that could solidify the economic importance of scenic resources.

*"Preserve nature
at all costs."*

To remain a viable avenue for economic development, the Valley's established and emerging tourism industry must protect this essential scenic, rural character. Success will depend on the ability to collaborate across the region, an undertaking that the Genesee Valley Trail Towns Initiative is uniquely positioned to lead.

2) Guide visitors to high-quality experiences

Our survey asked visitors to indicate which of the Genesee Valley Trail Town communities they spent time in on their most recent visit. Six of ten survey respondents who answered reported visiting more than one of these communities, a finding that underscores the value of collaborative promotion and of equipping people who provide visitor services with information they need to guide visitors to the high-quality experiences the Valley offers.

ExploreGeneseeValley.com provides the backbone for both of these imperatives. Expanding participation on the site by locally owned travel related businesses, event organizers, and heritage, cultural and nature sites that offer visitors quality, authentic experiences is one priority. In survey comments, many respondents identified specific interactions and experiences that they appreciated, some indicating that these experiences made them want to return.

Given the popularity of walking, hiking and on-trail bicycling, the new trail finder feature on ExploreGeneseeValley.com is an important tool for connecting outdoor recreation visitors with detailed trail information as well as with nearby businesses, events and sites. This tool responds to visitors' desire for better trail maps and encourages them to spend more time in the area, try out other recreation opportunities, and patronize local businesses.

3) Develop a Genesee Valley Trail Town ambassador program.

Another priority is expanding the pool of local residents and outdoor and hospitality industry employees who are knowledgeable about Genesee Valley collaborations (especially

"The Blue Rose B&B stay and Letchworth will bring us back."

ExploreGeneseeValley.com and the Trail Town program); understand the area's visitor services, attractions and culture; and offer travelers friendly interpretation and guidance in trip planning and while visiting. In our survey, visitors identified word of mouth as an important source of information for becoming aware of the Genesee Valley as a destination (35%) and word of mouth and local recommendations as a

resource for trip planning before and during travel (58%).

Developing a Genesee Valley Trail Towns ambassador program could augment the region's capacity to promote and protect its natural, heritage and community assets while encouraging visitors to stay longer, experience more, and support local businesses.

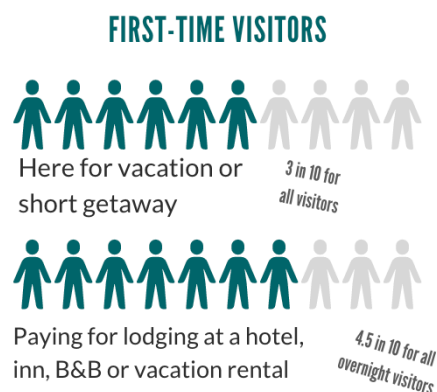
"Museum guide, Rick, was a lovely man and so knowledgeable! More more more please!"

Such a program could take a variety of forms, including:

- incorporating Genesee Valley content into existing tourism ambassador programs or custom short trainings offered in partnership with county Chambers of Commerce or tourism offices;
- recruiting more local content contributors for ExploreGeneseeValley.com;
- hosting networking and recreation/social events that help locals to learn about other communities in the Genesee Valley;
- developing an initiative modeled on Travel Oregon's "We Speak" program that encourages locals to share their knowledge of Genesee Valley resources and experiences with outdoor and hospitality industry employees who regularly interact with visitors.

4) Pay attention to first-time visitors — especially from Western New York

About 25% of nonlocal survey respondents said this was their first visit to the Genesee Valley. First-time visitors are more likely than all visitors to be here for a vacation or short getaway (59% vs 32%), and to stay in paid lodging at a hotel, inn or B&B (54% vs 47%) and less likely to be camping (5% vs 9%).



First-time visitors are under-represented among Monroe and Erie county survey respondents, the Genesee Valley's strongest visitor market. Only seven percent of visitors from these nearby urban areas were first-timers.

Promoting itineraries and trip packages for short getaways may appeal to outdoor recreation enthusiasts and other potential visitors in these close-by markets. One in ten first-time visitors came primarily for an event, so these deserve both promotion effort and more attention to developing new events, including events that focus on outdoor recreation.

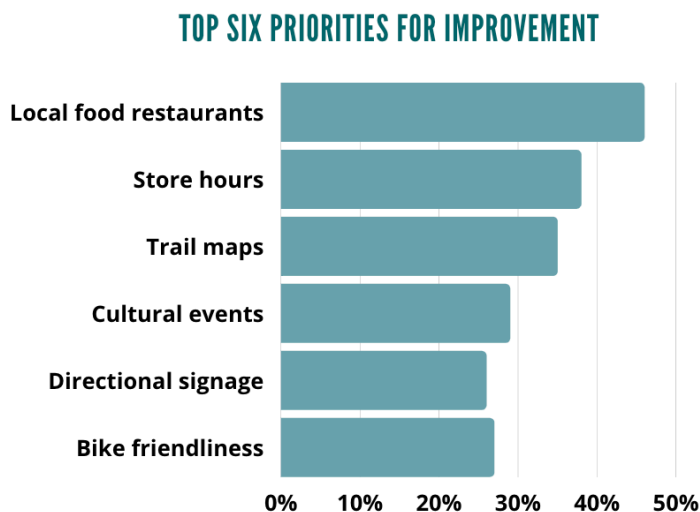
Forging more partnerships with influencers and tour guides in Western New York is another approach that could encourage more new visitors. An example is the partnership with Amy Riposo, who leads Rochester A-List Adventures, and leads group experiences in beautiful outdoor destinations, infused with food and drinks. Riposo is an ExploreGeneseeValley.com contributor who constructed the Conesus Lake Libation Loop itinerary based on one of her group tours.

5) Pay attention to changes visitors want to see

In its detailed market segment analysis, the 2017 LGV visitor survey found: "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."

Priorities for improvement found in our 2021 Trail Town visitor survey are substantially the same as those identified in 2017. (See graph at right for the top six priorities from the 2021 survey.)



Visitors have flagged restaurants featuring local cuisine and farm-to-table produce as their top priority for improvement. In 2019, Letchworth Gateway Villages collaborated with the Culinary Tourism Alliance to produce a Food Tourism Assessment for the Genesee Valley. This document evaluated the current state of food tourism in the region and provides municipal and county leaders with data and insights to support strategic decision-making and market improvements to boost the region's potential as a heritage tourism destination.

“Definitely need to have more shopping and restaurants open on the weekends earlier than 4 p.m.”

The 2017 Letchworth Gateway Villages visitor survey report offers a discussion of several of these top priorities for improvement, providing context from business inventories, intercept interviews and other sources. Trail Town community business audits provide another resource for improving local business practices to better meet travelers’ needs.

Taking Local Business Development Seriously

Taking guidance from the 2021 Genesee Valley Trail Town visitor survey and the 2017 LGV survey will help the Genesee Valley develop a strong outdoor recreation economy that benefits local residents and communities. The 2017 survey findings prompted Geneseo, Mount Morris and Perry to focus on business development and expansion, including local food and drink establishments. Other Trail Towns have been and are also focusing on new business development. New businesses that we know of in our Trail Towns since 2017 are listed below.

Food & Beverage

Anchors Coffee Bar - Nunda	The Little Fruit Stand - Geneseo
Avon Inn	Letchworth Valley Picnics - Caneadea/Hume
Boriken - Mount Morris	Livonia Inn
Brooklyn Pizza - Perry	Mortalis Brewery - Avon
Buried Barrel Cider - Lakeville	No BS Brewing - Avon
Butter Meat Co. - Perry	Ration Wine Bar - Perry
Coppa Co - Houghton, Caneadea	Rising Storm Brewery - Avon
Dublin Corners - Geneseo Main Street location	Spring Bottom Farms - Hume
Galene - Lakeville	Strange Design Brewery - Geneseo
Farm Drop - Linwood + Nunda	Sunset Scoops - Geneseo
Fede’s Scoops & Grill - Mount Morris	True North Farms - York
For the Love of Flour - Perry	Twins Family Restaurant - Geneseo
High Banks Tavern - Mount Morris	Valley Bread and Bounty - Fillmore
The Honky Donkey - Mount Morris	Whistling Farmer Pub - Nunda
Jockey Street Coffee Roasters - Houghton	Woodlawn Distilling (coming soon) - Linwood

Taking Local Business Development Seriously, *continued*

Other New Businesses Since 2017

11 Covington – Perry	Loch Life – Perry
AN Wine & Liquor – Geneseo	Market on Main – Geneseo
Books & Fields – Perry	Mystic Moon Crystals – Mount Morris
Bully Barbershop – Geneseo	Pip Pop Perry Pop Up – World’s Smallest Wool Shop
By the Light of the Moon – Cuba	Prehistoric World – Perry
The Craft Nook – Cuba	Nick of Time Escapes – Nunda
Dell Collective luxury Airbnb listings – Perry	Selah Spa & Massage – Cuba
Endlessly Outdoors – Perry	Silverlaken Glampsites – Perry/Castile
The Gallery in the Valley – Geneseo	Smokers Emporium – Geneseo
Hillcrest Estates (weddings, events, lodging) – York	Sunrise Bouldering – Geneseo
The Little Alchemy Shop – Cuba	The Valley Shop – Nunda
LiveCo Barbershop - Geneseo	The Village Outlet - Cuba



6) Continue developing, refining and using the Genesee Valley brand

Among the top recommendations in the 2017 LGV visitor survey report was:

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 regional identity that emerged from the resulting branding effort was the Genesee Valley, a broader, more encompassing identity strongly based in outdoor recreation, shared natural resources, and a rural landscape of agriculture and small, friendly communities. ExploreGeneseeValley.com is a strong representation of that brand.

Efforts underway will build on the Genesee Valley identity to develop a consistent brand and aesthetic for Trail Town communities as an important next step in building a regional identity. Rather than starting from scratch, this effort will leverage existing design guidelines, models and planning studies produced by our network of partners to develop a set of consistent Genesee Valley design guidelines and best practice for signage, wayfinding, building facades, and streetscapes for our network of Trail Towns. A new Genesee Valley Trail Town logo and marketing materials are also in the works.

Widespread and consistent use of these brand resources will help the Genesee Valley establish a clear identity for visitors and potential visitors. Trail Towns can take the lead in this effort, making sure that the brand remains rooted in the reality of the visitor experiences that our communities can consistently deliver.

Better than 40% of visitors report they use “walking around at the destination” to help them plan their trips. Directional signage that connects trails and other outdoor recreation areas with communities and local businesses — and vice versa — is an important priority identified in many of the Trail Town Action Plans. Another effort that has been proposed and would help fill this need is a valley-wide interpretive plan.

Making better physical connections between Trail Towns and existing recreational resources as well as those yet to be completed (e.g., the Genesee Valley Greenway) or built, is a clear priority for a region aspiring to solidify its identity as an outdoor recreation destination. Trail Town Action Plans are a good starting point for identifying related specific projects.

“Complete the Greenway through the Town of Caneadea. Have a canoe/kayak put-in and take-out location on the Genesee River near Houghton and also near Fillmore.”

Appendix A: Survey Questionnaire



Genesee Valley Trail Towns Visitor Survey

Hello and welcome to the Genesee Valley.

As a growing outdoor recreation destination in western NY, our Genesee Valley Trail Towns want to ensure the highest quality visitor experience.

By taking part in this brief survey you will help us improve our communities and future offerings for visitors. All responses will remain confidential. There are 25 questions, and it takes most people about 6-8 minutes to complete.

Upon completion of the survey you will automatically be entered to win prizes that include a gift basket filled with Genesee Valley products (\$100 value) and a 2022 Empire Pass for New York State Parks. Thank you for your time and help!

1. Today's Date:

Please enter today's date

Date

MM/DD/YYYY

2. Where did you pick up this survey?

- ☐ A community in the Genesee Valley
- ☐ Genesee Valley Greenway State Park
- ☐ Letchworth State Park
- ☐ Finger Lakes Trail
- ☐ Genesee Country Village & Museum
- ☐ ExploreGeneseeValley.com
- ☐ Facebook or other social media platform
- ☐ An event

Please specify where you picked up the survey (e.g., list the business, community, event, website or social media platform)

3. Is this your first visit to the Genesee Valley?

- ☐ Yes
- ☐ No
- ☐ I live here

4. How did you hear about the Genesee Valley? (check all that apply)

- ☐ ExploreGeneseeValley.com
- ☐ Magazine or newspaper
- ☐ Brochure / Travel Guide
- ☐ Radio or TV
- ☐ Word of mouth
- ☐ Visited before
- ☐ I have lived here a long time

If "Online" or "Other", please list websites or other channel

5. On this trip, or your most recent trip, are you spending time at one or more of the following outdoor recreation locations? (check all that apply)

- ☐ Letchworth State Park
- ☐ Genesee Valley Greenway State Park
- ☐ Finger Lakes Trail
- ☐ Silver Lake/Silver Lake State Park
- ☐ Conesus Lake
- ☐ Genesee River
- ☐ Rattlesnake Hill Wildlife Mgmt. Area/Ossian State Forest
- ☐ Allan Lake State Forest
- ☐ Crab Hollow State Forest
- ☐ Genesee Country Village & Museum
- ☐ New York's Finger Lakes Region
- ☐ Other (please specify)

6. On this trip, or your most recent trip, are you spending time in one or more of the following communities? (check all that apply)

- ☐ Avon
- ☐ Caneadea
- ☐ Cuba
- ☐ Geneseo
- ☐ Hume
- ☐ Mount Morris
- ☐ Nunda
- ☐ Perry
- ☐ Wheatland
- ☐ York
- ☐ Other (please specify)

7. What is the primary purpose for visiting this area? (Mark only one answer)

- ☐ Visit friends and/or family
- ☐ Business
- ☐ Vacation
- ☐ Short getaway
- ☐ Recreation
- ☐ SUNY Geneseo visit or event
- ☐ Passing through
- ☐ An event, museum, heritage site or other (please specify)

8. Is this trip a...

- ☐ A day trip
- ☐ An overnight stay

If staying overnight, how many nights?

9. If staying overnight, where are you staying? (Check all that apply)

- ☐ Letchworth State Park
- ☐ Friend's or family member's home
- ☐ Hotel / Inn / B&B
- ☐ Vacation Rental / Airbnb
- ☐ Campground
- ☐ Other (please specify)

10. During this and previous visits to the Genesee Valley, have you taken part in any of the following outdoor activities? Check all that apply.

- ☐ Hiking or walking
- ☐ Road bicycling
- ☐ Bicycling on trails
- ☐ Canoeing, kayaking or other paddle sports
- ☐ Swimming or tubing
- ☐ Fishing
- ☐ Hunting
- ☐ Skiing or snowshoeing
- ☐ Motorized boating
- ☐ Jet skiing / personal watercraft
- ☐ Hot air ballooning
- ☐ Camping at a campground or RV park
- ☐ Backpacking
- ☐ Picnicking
- ☐ Other outdoor recreation (please specify)

11. If this is not your first visit, how often have you visited?

- ☐ Once a year
- ☐ Multiple times a year
- ☐ Once every 2+ years
- ☐ Once every 5+ years
- ☐ I live here
- ☐ Part-time or seasonal resident

12. Where are you from?

Zip Code (U.S. residents)

Country of Residence (non U.S. residents)

13. Please estimate the amount of money your travel party is spending PER DAY in the area for the following categories. Use U.S. dollars with NO decimal places (example \$92.00 = 92).

If you live here, please estimate spending on your most recent recreational outing in the Genesee Valley. Fill in zeros if you didn't spend any money.

Lodging or Camping	<input type="text"/>
Restaurants or Groceries	<input type="text"/>
Transportation (including gas)	<input type="text"/>
Shopping / Souvenirs	<input type="text"/>
Recreation / Entrance Fees / Tours / Permit Fees	<input type="text"/>
Other (please define)	<input type="text"/>

14. Please tell us the number of people these expenses cover

15. When deciding to visit this area, how important were the following?

	Not Important	Somewhat Important	Moderately Important	Very Important
Scenic beauty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor recreation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rural, small town character	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Historic main streets and historical or cultural attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Farmstands, markets or local food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity to larger cities (e.g., Rochester, Buffalo)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not crowded / easy to access	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

16. What could the area improve to enhance the visitor experience?

	Needs Improvement	No Improvement Needed	Not important to me
Directional signage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online visitor information / central website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants featuring local cuisine and farm-to-table produce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local wineries and craft breweries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specialty retail / souvenir shops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stores open weekends, evenings (after 6pm) and late night (after 10pm)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maps of hiking and multi-use trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bicycle-friendly facilities, trails and roadways	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor recreation equipment and gear rental and repair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local transportation options - cabs, rideshare (i.e. Uber), shuttles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lodging options (e.g., hotel, B&B, Airbnb, "Glamping")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guided tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural events (e.g. festivals, beer/wine tastings, food tours)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spa / wellness services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

17. What sources do you use when traveling / planning a trip? (Check all that apply)

- ☐ ExploreGeneseeValley.com
- ☐ Consumer review sites such as Yelp or TripAdvisor
- ☐ Travel booking sites such as Expedia, Priceline or Travelocity
- ☐ Print brochures and/or visitor guides
- ☐ Word of mouth / recommendations from locals or hotel staff
- ☐ "AAA" Auto Club
- ☐ Walking around at the destination
- ☐ General internet research
- ☐ Other (please specify)

18. What is your gender?

- ☐ Female
- ☐ Male
- ☐ Prefer not to say
- ☐ Prefer to self-identify

19. In what year were you born?

20. How many people are you traveling with including yourself?

of Adults:

of Children (under 18):

21. Who is traveling with you on this trip?

- ☐ Friends
- ☐ Family
- ☐ Friends and Family
- ☐ Tour Group
- ☐ Alone
- ☐ Other (please specify)

22. What is your annual household income?

- ☐ \$0-\$30,000
- ☐ \$30,000-\$49,000
- ☐ \$49,000-\$99,000
- ☐ \$100,000+
- ☐ Prefer not to say

23. On a scale of 1 to 10, with 1 being "no way" and 10 being "absolutely," how likely are you to consider returning for another visit to the Genesee Valley?

No way					Maybe						Absolutely
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. Is there anything else you would like to tell us?

25. Would you be interested in receiving information about winter activities and accommodations?

- ☐ Yes
- ☐ No
- ☐ If yes, please provide your email address (we'll only use it to send you this winter travel information)

26. Thank you for taking the time to complete this survey. By filling out this survey you are automatically entered into a drawing to receive prizes that include a gift basket filled with Genesee Valley products (\$100 value) and a 2022 Empire Pass for New York State Parks. Please enter your email address so we can notify you should you win!

Appendix B: Other Responses to “What Could the Area Improve to Enhance the Visitor Experience?”

The relevant comments noted in the “other” response category are included below, clustered into categories for easier interpretation. One response to consider as context for several of these comments: “Answers based on non-COVID times - everything needs improvement during COVID, of course.”

Facilities

- Kayak boat launches (ADA accessible, etc.)
- Trails need to be improved through Caneadea area
- Improved hiking trails and better maps
- More accesses to the beautiful Genesee River with signage
- Campgrounds
- Greenway trail needs better signage and promotion
- GVG State Park Trail system in Caneadea needs improvement and completion
- improvements to the GVG State Park Trail in Caneadea area
- GVG in Caneadea need to be completed without any road riding on route 19 which is a dangerous road. The trail needs to be completed to allow through cyclists to stay on the trail at all times.
- GVG trail system
- Parks need cleaner facilities, fix what is broken more quickly
- More public rest rooms, especially on the Greenway and along the Genesee River.

Promotion/information

- Would really like a central location to find info on restaurants, farmstands, specialty shops...perhaps even a map with them marked ..a “trail” of
- Improved hiking trails and better maps
- A site/calendar where I can find out what’s happening!!
- Greenway trail needs better signage and promotion
- Hard to answer some of these because I didn’t know where to go to learn more about festivals and live music, etc - I think a website, social media outlets
- More trails. More equestrian options.
- In planning, the Letchworth sites did not make it clear which communities served which park entrances. I really had no idea how far places were from each other.

Services

- CELLULAR SIGNAL!; I have T-Mobil which services a large percentage of the U.S. and has very saturated coverage in the NY state area according to data collected in 2021. However, in Silver Springs, Letchworth State Park and Perry, I had no coverage whatsoever. I appreciated the ability to "disconnect," however, it was very inconvenient for looking up places to eat or getting directions via Google Maps. If a deal for expanded coverage is too challenging, I would recommend providing an index of known carriers that cover the area so we can purchase prepaid SIMs for our phones.

- Wi-fi and internet access are terrible.
- Wireless service. No service in the park yikes how can we find food or lodging or other areas?
- Availability of cell phone signal.
- Public transportation and connections to larger cities (e.g. Rochester) need to be GREATLY improved.

Businesses and events

- Farm to table we went to was great. Wish there were more.
- The live music events are fabulous. They could be improved by adding designated dance floors in the venues. All the featured music was performed traditionally for social dancing. The absence of dancing diminishes the experience greatly. If in a building you can rope off dance floors. On the meadow in tents you can setup temporary wood floors.
- Charged for parking and Shuttle bus only to walk to and from craft show.
- Needed: restaurants in Nunda, Canaseraga, Castile, NY.
- Reliability of posted business hours (Livingston Lanes Bowling Alley)
- Fishing charters/guides.
- Finding a place to eat dinner was far and few between.
- Need more places to eat.
- Parking for the arts festival was problematic outside Letchworth park entrances.
- Need a good coffee shop in town.

General

- We hope one day to put in a B&B at Moss Lake, so we are glad you are doing this, but also love the hidden gem of the area and its undeveloped state.
- Support lgbtq community.
- Improve water quality, especially Silver Lake.
- Most people I know have never heard of the Genesee gorge or Letchworth State Park.
- Too much police presence.
- Better warnings of speed limit decrease.