



Letchworth

GATEWAY VILLAGES INITIATIVE

2017 VISITOR SURVEY

Summary of 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.

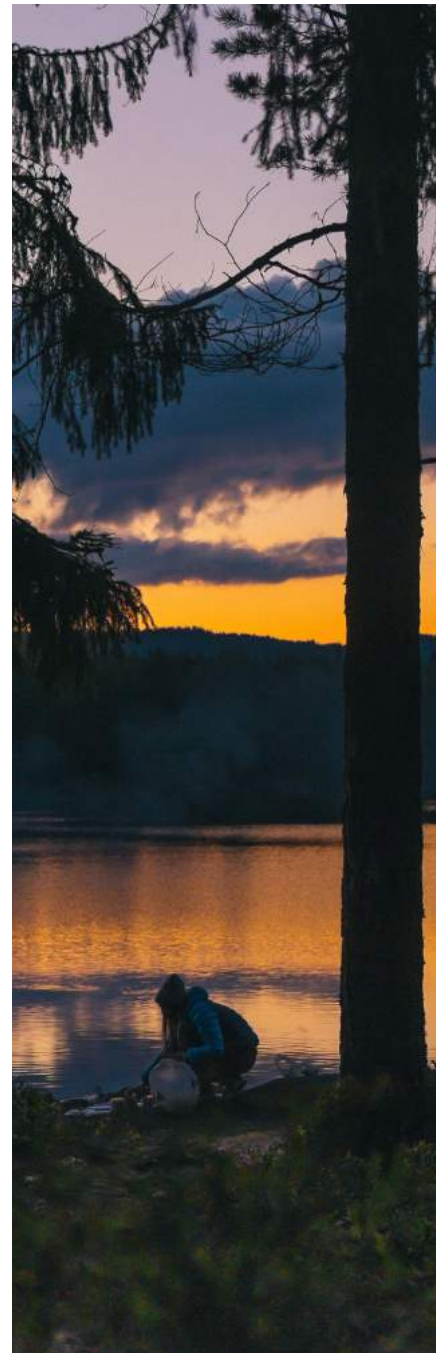


Photo: Andreas-Ronningen

"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?

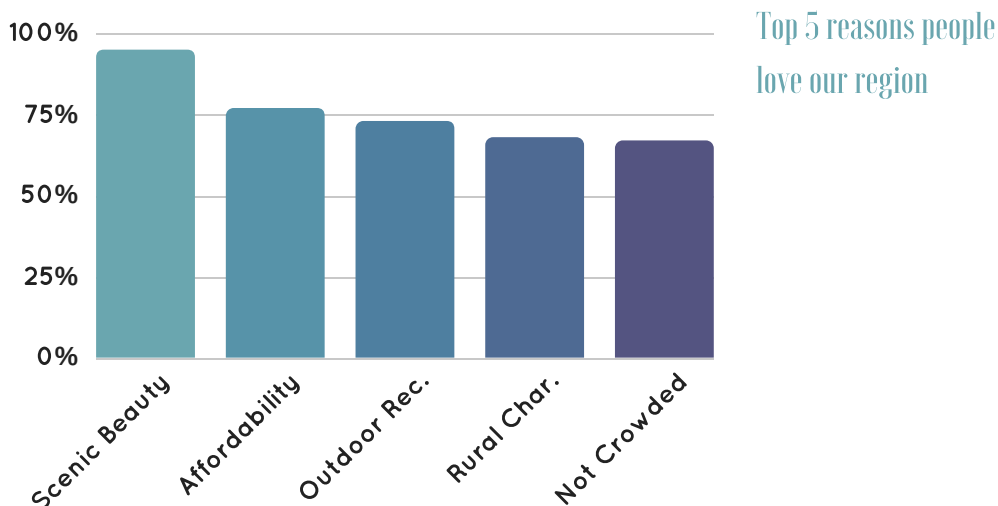
WHO IS THIS REPORT FOR?

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.

OVERVIEW

In February 2015, a snapshot of a frozen fountain (mistaken for a geyser) at Letchworth State Park's Glen Iris Inn went viral on social media channels around the world, propelling the park into the national spotlight. In April of the same year, a national USA Today Reader's Choice poll selected Letchworth as the number one state park in the country. The park's heightened fame fueled visitation to record levels, reaching 852,173 visitors by the end of 2015 – a 34% increase over previous years.(3)

Two years on, Letchworth's popularity continues to grow. In October 2017 another USA Today poll named Letchworth New York State's #1 attraction. Despite the closure of one of the park's main entrances for construction, visitation remains high with nearly three-quarters of a million people coming throughout the year to experience the "Grand Canyon of the East."(4)

Like other public lands throughout the U.S., Letchworth State Park's increasing visitation presents both opportunities and challenges for local residents in the surrounding gateway communities. The term, "gateway communities," is used to describe towns adjacent to public lands or protected areas like national and state parks.(5)

Because of their proximity to each other, public lands and gateway communities are highly interdependent. In most cases, gateway communities benefit from their proximity to public lands. However there are cases where poor planning and accelerated growth can result in diminished quality of life for local residents and negative impacts on the visitor experience.



Photo: Wyoming
County Free Press

3) NY State Park Recreation and Historic Preservation

4) Ibid.

5) National Park Service

2016 Economic Impact of Letchworth Visitor Spending

591

Jobs

\$51

Million Local
Sales

\$20

Million Labor
Income

ECONOMIC DEVELOPMENT OPPORTUNITIES FOR GATEWAY COMMUNITIES

Attractive places and quality of life are at a premium in today's economy. Visitation to public lands is at an all time high,(6) while improvements in communication technology have allowed people to live and work where they want. As can be seen from the experience of many gateway communities adjacent to Western public lands (Yosemite, Yellowstone, etc.) this dynamic is driving population growth in these areas and nurturing new economies. (7)

While these trends have been welcome from an economic perspective, they also represent potential threats to the same natural amenities and quality of life that drew people to live, work, and recreate in these areas in the first place. Gateway communities are thus presented with the simultaneous challenges of maintaining their character and lifestyle, conserving their natural assets, and attempting to forge a robust and sustainable economy.

LETCHWORTH'S ECONOMIC CONTRIBUTION TO THE SURROUNDING GATEWAY COMMUNITIES

According to research conducted by Parks and Trails New York, the Genesee Park Region received 1,531,055 visitors between April 1, 2015 and March 31, 2016, generating a total of \$94 million in visitor spending.(8)

As one of 12 facilities within the Genesee Park Region, Letchworth State Park garners on average 53% of total visitation, generating an estimated \$51 million in local and non-local visitor spending.(9) This in turn supports an estimated 591 jobs in the local area and \$20 million in labor income. (10)

(6) National Parks Conservation Association, "National Parks Witnessed Record-breaking Visitation in 2016," Feb 2017.

(7) National Parks Conservation Association (May 2006), Gateways to Yellowstone: Protecting the Wild Heart of our Region's Thriving Economy.

(8) Garrett-Peltier, Heidi, 2017. "The Economic Benefits of the New York State Park System," p. 3. Prepared for Parks and Trails New York by the Political Economy Research Institute.

SUSTAINABLE TOURISM POTENTIAL IN LETCHWORTH'S GATEWAY VILLAGES

Tourism has become an important economic driver and growing source of revenue for cash-strapped state and local governments. Since the employment recovery began in 2010, **the travel industry has created 972,000 new jobs at an 18 percent faster rate than the rest of the US economy. To put that in context, that is more jobs than the entire U.S. manufacturing sector. (11)**

In addition to helping states and localities build a strong tax base, a vibrant travel and tourism industry creates a “virtuous cycle” of economic benefits by improving the quality of life for local residents and making a community more attractive to potential employees and businesses.(12)

Tourism is now the fourth largest private sector employer in New York State. In 2016 New York set new records for visitation and direct visitor spending for an overall economic impact of \$104.8 billion. (13) Closer to home in the **Finger Lakes tourism supports nearly 60,000 jobs, brings in \$2.9 billion in revenue to local businesses and generates \$385 million in state and local taxes.(14)**

With over 750,000 visitors annually and its designation as the #1 state park in the nation, Letchworth State Park’s popularity presents an important opportunity for gateway communities to maximize economic opportunities arising from this growth. In addition to the Park, the region is poised to capitalize on its strong agricultural industry, scenic blueways, historic districts, and arts culture as the market for food tourism, sustainability, and off-the-beaten track experiences continues to grow.(15)

Letchworth State Park's popularity represents an important opportunity for gateway communities to maximize economic opportunities.

(9) Estimate of Letchworth State Park’s contribution to the local economy calculated using Letchworth State Park visitation data to derive percentages of economic impact findings reported in the 2017 Parks and Trails New York study referenced above.

(10) Garrett-Peltier, Heidi. 2017. “The Economic Benefits of the New York State Park System,” p. 5. Prepared for Parks and Trails New York by the Political Economy Research Institute.

(11) U.S. Travel Association, 2017 Report. The Power of Travel Promotion: Spurring Growth, Creating Jobs.

EVALUATING OPPORTUNITIES

With these opportunities in mind, it is also important to take the time to evaluate the best tourism-related market opportunities and segments for future growth. For example what kind of tourism and visitor segments will help us sustain our natural assets and quality of life while still driving economic growth? What market opportunities best align with our regional strengths? What kinds of policies are required to attract investment and stimulate growth in this sector? What will the workforce development needs be over the long term?

As a first step towards better understanding how our communities can maximize economic opportunities related to travel and tourism in our region, LGV launched a visitor survey this July to provide the following information to local businesses and municipal leaders in the three gateway communities (Perry, Mount Morris and Geneseo):

- Who visits our region?
- What attracts them to our area?
- 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?

In addition to the survey findings, this report contains analysis on key market segments for the gateway communities as well as promising tourism-related opportunities that align with our regional strengths and that can best support sustainable economic growth.

At the end of this report are recommendations to inform decision-making at the municipal level. Recommendations focus on what municipal and community leaders should encourage and incentivize across the gateway communities as well as where long-term investment should be focused. These recommendations also form the basis for LGV's activities with municipal, county, business and community stakeholders through 2019.

Gateway communities face the simultaneous challenges of maintaining their character and lifestyle, conserving their natural assets, and attempting to forge a robust and sustainable economy.

(12) White D., and D. Wynne. 2014. "The Regional Impacts of Quality of Life on Entrepreneurial Decisions." Area Development.

(13) The Economic Impact of Tourism in New York, 2016. Tourism Economics.

(14) The Economic Impact of Tourism in New York, 2016, Finger Lakes Focus. Tourism Economics.

(15) Skift Report, Megatrends Defining Travel in 2017.

SURVEY DESIGN & ANALYSIS

From July through October 2017 the survey was deployed in three formats:

- A paper brochure with 11 questions designed for patrons in the park and surrounding communities without Internet access.
- An online version with 21 questions accessed through a hyperlink and QR code promoted on rack cards and posters displayed in 70 locations through the three gateway communities, the Genesee Valley Greenway and Letchworth State Park.
- Intercept surveys conducted at signature events (e.g., Perry Chalk Art Festival, Geneseo Summer Festival, Letchworth Arts and Crafts Festival, etc.)

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

The results are taken from 434 responses collected from visitors between July 1 and October 31, 2017 to capture data during the peak tourism season. Data collected in this visitor survey was analyzed against existing market analysis and economic data sources provided by the Livingston and Wyoming County Chambers of Commerce and Tourism, The Finger Lakes Regional Tourism Council, and Parks and Trails New York.



Photo: Callistus Ndemo

76%
of survey
respondents
spent time at
the park during
their stay

38%
cited visiting the
park as the
primary reason
for their visit

SURVEY DESIGN

This survey was designed to learn more about visitors to Letchworth State Park and surrounding areas, their behavior and preferences. Park visitors were strongly represented among survey respondents, with 76 percent reporting spending time at the park during their stay. Thirty-eight percent reported that visiting the park was the primary reason they visited the area.

Most respondents accessed the survey via Facebook promotion facilitated through Letchworth Gateway Villages, Friends of Letchworth, the Glen Iris, Promote Geneseo! and Letchworth State Park Lovers. The second most frequent place respondents picked up the survey was in Letchworth State Park. Third was Geneseo. Smaller numbers of respondents picked up the survey in Mount Morris or Perry.

The ways in which survey responses were solicited may have led to over-representation of repeat visitors to the area among respondents. Only 16 percent of the 345 respondents who answered this question indicated that they were first-time visitors to the area.

Anecdotal information supports the finding that most visitors to the park and surrounding area have been here before. Further, visitor research conducted in the nearby Finger Lakes region parallels this survey's findings. A 2012 Ontario County visitor survey found that 61 percent were repeat visitors, and that the majority of visitors came from a driving-distance market within New York, Pennsylvania, and Ontario, Canada.⁽¹⁶⁾ In the LGV survey, a majority of visitors are from Western New York, especially nearby counties (Monroe and Erie) with easy access to the Letchworth State Park area.

(16) Young Strategies, Inc. Finger Lakes Visitors Connection Comprehensive Destination Research, Tourism Market Analysis, Marketing Recommendations, 2012.

GENERAL SURVEY FINDINGS & MARKET SEGMENT ANALYSIS

This report focuses first on key findings from the survey sample as a whole that inform the core questions we sought to address at a broad level (e.g., Who are the visitors to our region? What attracts them here? etc.). In those overall findings, we used various portions of the sample to further explore patterns within our analysis of visitor spending, trip-planning information sources, motivation to visit, and optimal forms of communication. (See list in sidebar.)

Of these, we selected **five segments** for further analysis of factors that influence decisions to visit and preferences for improvements to enhance the visitor experience: **overnight visitors, Generation X and Millennials, Baby Boomers and older, \$100,000+ household income, and Monroe and Erie county residents**. The Baby Boomers segment is used to represent this area's "traditional visitors," while the other segments represent high-value or under-represented parts of the potential visitor market. This segment analysis is discussed in further detail in the second part of the survey report under "Market Segment Analysis."

Visitor Segments Used in Analysis

- **Non-local visitors**
outside a 25-mile radius of
Letchworth (n=380;
88% of sample)
- **Out of state and international visitors**
(n=84; 19% of sample)
- **New and occasional visitors** (n=80; 18% of sample)
- **Generation X and Millennials** (n=202; 51% of sample)
- **Baby Boomers and older** (n=204; 52% of sample)
- **Overnight visitors**
(n=185; 48% of sample)
- **Day visitors** (n=196; 52% of sample)
- **Summer visitors**
(n=169; 44% of sample)
- **Fall visitors** (n=212; 56% of sample)
- **>\$100,000 household income** (n=89; 31% of sample)
- **Monroe and Erie county residents**
(n=92; 24% of sample)

Our Typical Visitor



48 years old

Moderate income
(\$49-\$99,000/
household)

Lives in
Western New
York



Spends

\$45/day trip

\$96/day when
visiting
overnight



Travels with
spouse,
partner, or
small group
(average 2.4
persons),
usually without
children

Visits multiple
times per year

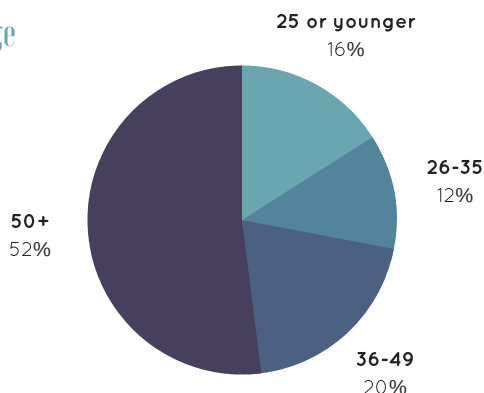
KEY FINDINGS

VISITOR MARKET

Who are our visitors?

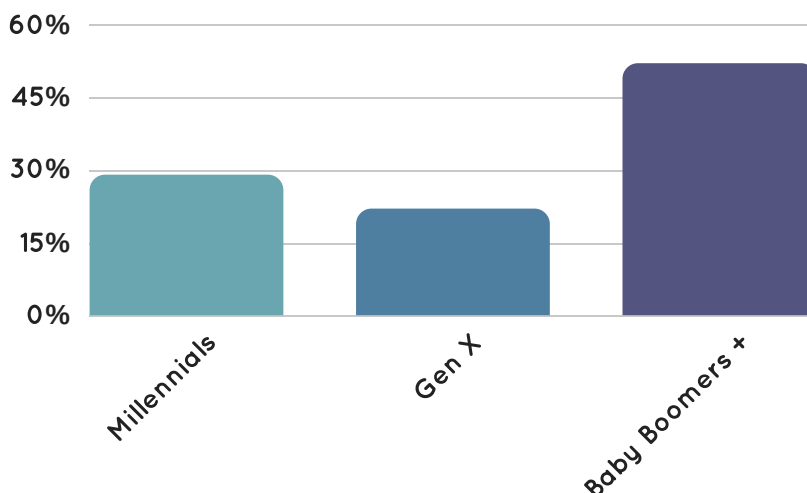
Overall the area attracts mature, affluent visitors, traveling without children. The average age of survey respondents was 48 years old. The majority of respondents (52%) were people aged 50 years and up. The second largest cohort of visitors included people aged 36-49 (20%).

Visitor Age



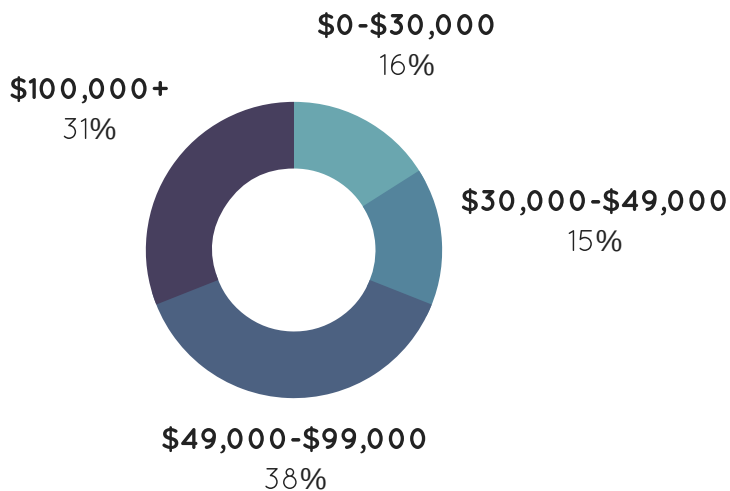
As the two largest generations to date, Millennials (29%) and Baby Boomers (52%), not surprisingly, also represent the largest generations visiting the area.

Generational Breakdown



Visitors are generally affluent. Nearly a third (31 percent) of visitors who answered this question reported annual household incomes greater than \$100,000, while 38 percent reported household incomes between \$49,000 and \$100,000.

Household Income



63%

had visited the
park before

58%

visit the park
multiple times a
year

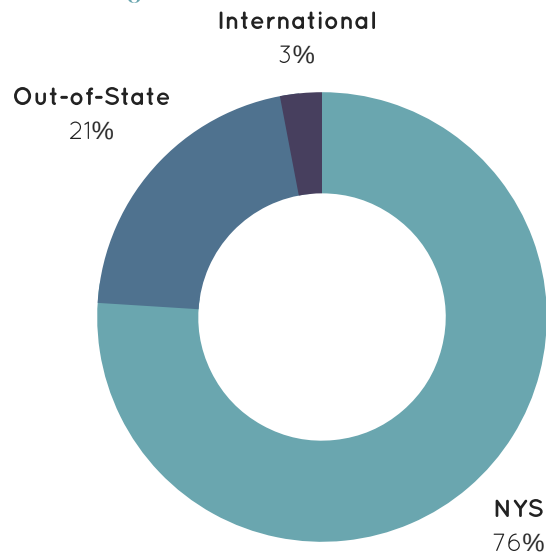
Sixty-three percent of respondents had visited the park before. Fifty-eight percent cited previous visits as the primary reason for knowing about the park and surrounding area. The majority of respondents indicated they visited the park multiple times a year (58%).

The majority of respondents were families traveling with a partner or spouse (77%). Of the visitors traveling with family, only about a quarter were families with children under the age of 18 (27%).

Most visitors surveyed were taking a day trip to Letchworth (52%) versus spending the night (48%). Gen X and Millennials are disproportionately likely to be day visitors (66%) compared to the sample as a whole (52%).

Out-of-state and international visitors are, not surprisingly, much more likely to be overnight visitors (83%) than the sample as a whole (48%). Fall visitors are somewhat more likely to be day visitors (57%) than are summer visitors (51%).

Visitor Origin



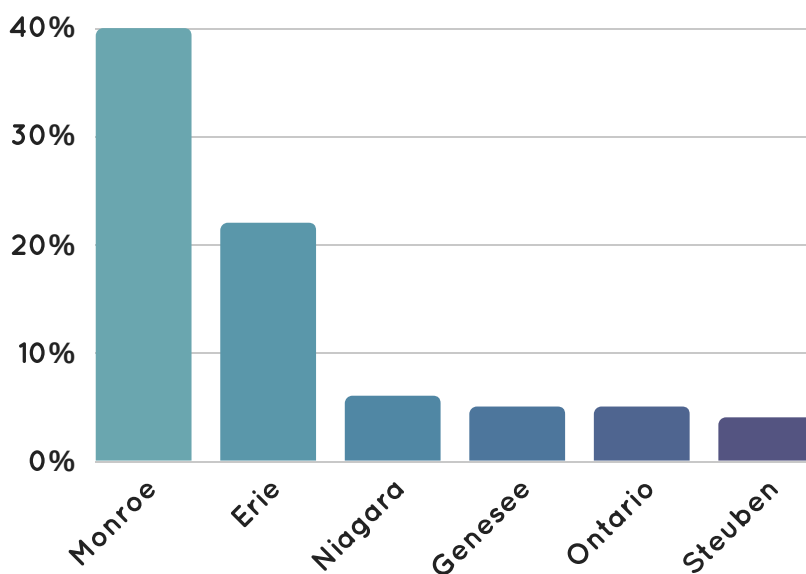
WHERE ARE VISITORS COMING FROM?

Seventy-six percent of survey respondents visiting the region were from New York State. Of New York visitors, 68 percent came from Western New York, with the highest level of visitation from Monroe and Erie counties. For people coming from out of state, top states included Pennsylvania, New Jersey, Florida, Massachusetts, California, Maryland and Ohio.

In the summer months visitation differed slightly with a larger percentage of New York State (80%) and Western NY visitors (76%), while visitation was lower for international (1%) and out-of-state travelers (19%) in the summer. Higher levels of downstate NY visitors, international and out-of-state visitors in the fall may be attributed to the return of SUNY Geneseo parents and students from outside Western New York as well as the draw of fall foliage for international and out-of-state visitors.

68%
of survey
respondents are
from Western
New York

Top 6 Counties of Origin for Visitors from Western New York

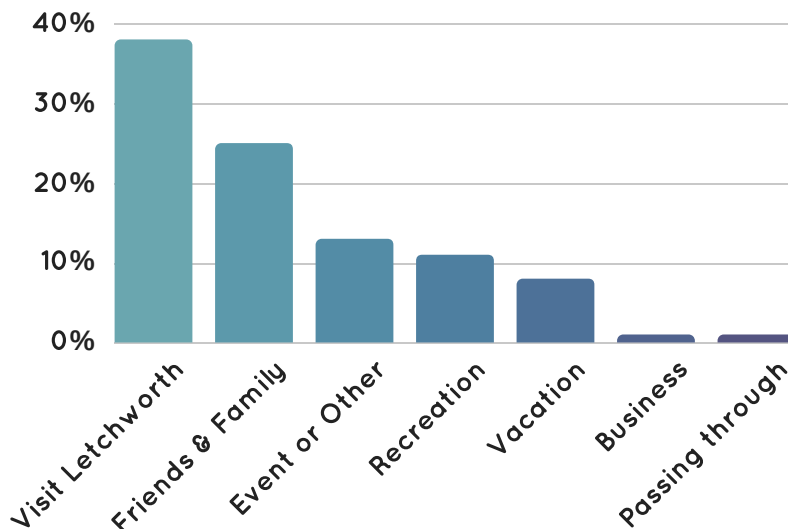


WHY ARE VISITORS COMING HERE?

The top reasons visitors cited for visiting the region included visiting Letchworth State Park (38%), visiting friends and family (25%), attending an event (13%) and outdoor recreation (11%).

"We love the improvements to Perry with Silver Lake Brewery and all of the street improvements."

Primary Reason for Visiting



Letchworth State Park is the primary draw overall and is more important for day visitors (46%) and for those who have never visited the area or who visit the area less frequently (46%) compared to the sample as a whole (38%).

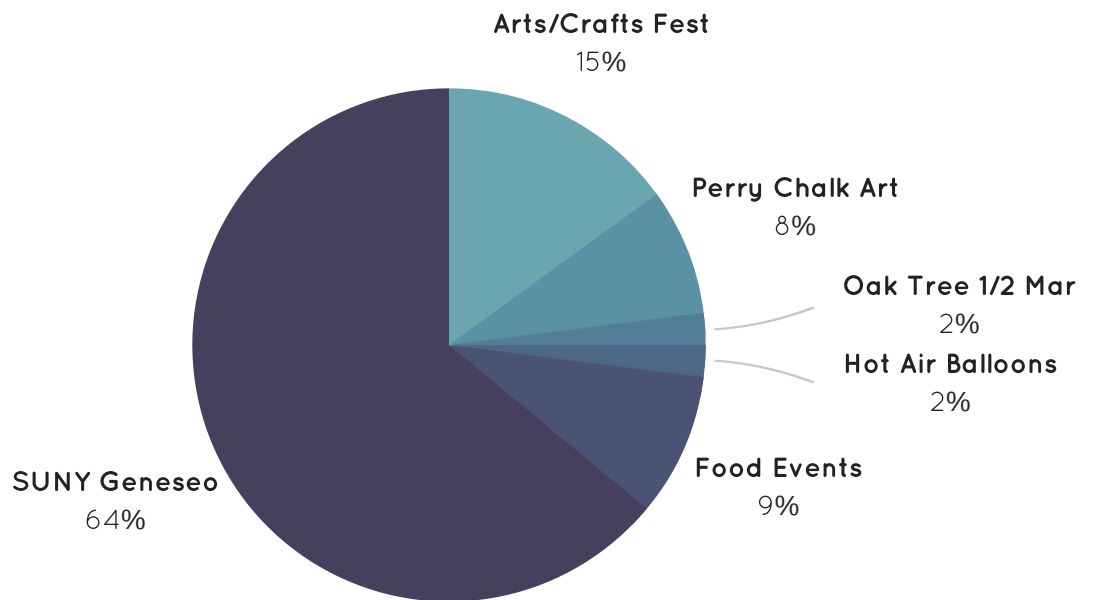
The second most cited reason for visiting the area was friends and family. Family reunions, alumni events and anniversaries were frequently mentioned as other primary reasons for visiting. This finding is strongly supported by anecdotal evidence from restaurant and other hospitality staff interviewed over the course of this process as well as Promote Geneseo's visitor center which surveys visitors during Geneseo's Summer Festival every July. Catering to, continuing and celebrating these traditions may be an effective promotion strategy for perpetuating the cycle of repeat visitation.

Recreation registers as the primary reason for a visit for 17% of day visitors, and 15% of Generation X/Millennials. It is also a more important reason for fall visitors (13%) than for summer visitors (8%).

EVENTS

Visitors cited several events in the region over the summer and fall that drew them to the area. **The most significant (64%) were SUNY Geneseo events for students and parents** (e.g. taking kids to school, orientation or parent weekends). In interviews conducted with families during orientation, parents commented on the difficulty in finding accommodation in Geneseo during the summer and were not aware of options in other communities only a 10 or 15-minute drive away. This is important to note for local tourism-related businesses outside of Geneseo.

Events that Draw Visitors to the Area



Other destination events highlighted by respondents included the annual **Letchworth Arts and Crafts Festival (15%)** which draws on average over 90,000 visitors to the region every October.

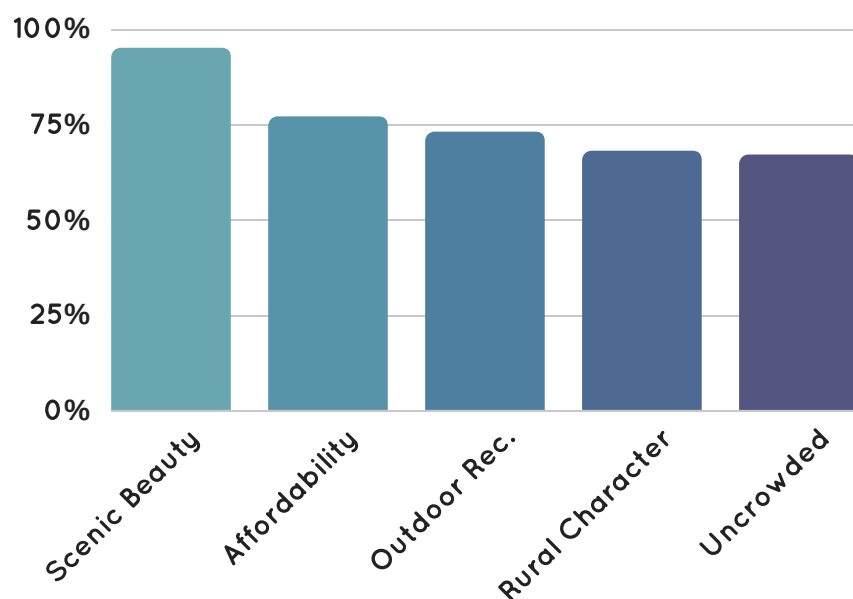
Nine percent of event goers cited events at **the Hole in the Wall (HITW) Restaurant (Perry)**, **the Charcoal Corral (Perry)** and **Glen Iris (Letchworth State Park)** as their primary reason for visiting the area. This suggests that food experiences and events can be draws for attracting people to the region.

WHAT VISITORS APPRECIATE ABOUT OUR REGION

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, historical/cultural attractions, and uncrowded/accessible feel.

Survey respondents overwhelmingly agree that scenic beauty is one of our region's strengths. Affordability, outdoor recreation options, rural character and uncrowded, easy-to-access nature of the area also topped the list of strengths.

Top 5 Things Visitors Love about Our Area



While visitors were more divided about the importance of the historical and cultural aspects of our area, more than half of respondents (n= 258, 61%) felt these were important features of the region.

Despite the fact that the majority of respondents came from Monroe and Erie Counties, proximity to Rochester and Buffalo was not considered an important asset to survey respondents.

In the “other comments” section, respondents frequently cited friendliness of locals in our area, a welcoming attitude and great customer service as other important strengths of our region.

"Small towns, farms and the extraordinary Letchworth Park make this a heavenly place of peace, beauty and hospitality."

VISITOR BEHAVIOR

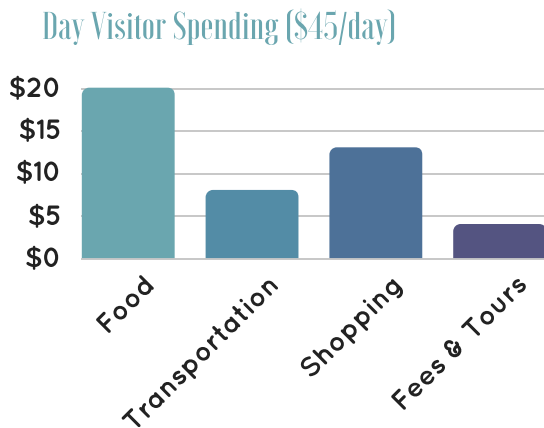
Length of stay

Overnight visitors stay significantly longer in the summer (5.4 nights) than in the fall (2.5 nights). Average length of stay for all overnight visitors is 3.3 nights.

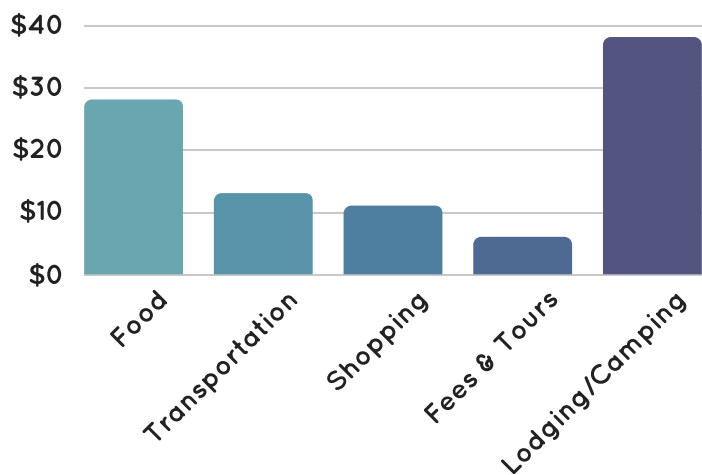
Average visitor spending

Visitors taking the online survey or participating in the intercept survey were asked to provide estimates of their daily spending across five key categories. The results were averaged across a sample of 276 visitors who responded to this part of the survey. Expenses on average covered a group or family of 2.6. The highest spending categories included restaurants and groceries, lodging, and camping, a breakdown consistent with other travel industry data.⁽¹⁷⁾

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.



Overnight Visitor Spending (\$96/day)



(17) The Economic Impact of Tourism in New York, 2016. Tourism Economics.

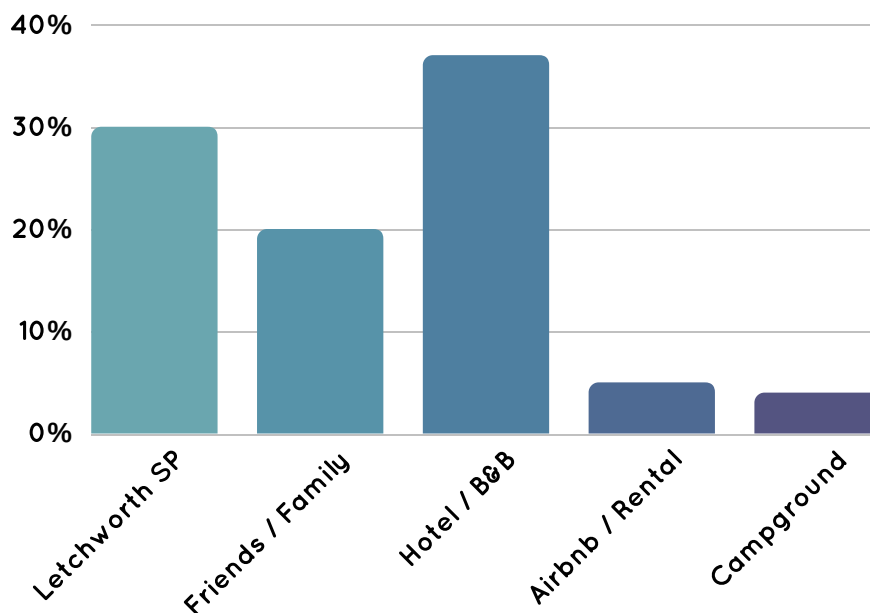
Differences among market segments

- Out-of-state and international visitors spend more per person per day (\$99) than do overnight visitors as a whole (\$83).
- Average spending per party per trip is \$1,052 for overnight out-of-state and international visitors, and \$1,137 for all overnight visitors.
- Summer visitors spend more per trip (\$929) than do fall visitors (\$433), in large part because they stay longer.

Where overnight visitors stay

Most visitors (37%) stay in hotels, inns or B&Bs outside the park when visiting the area. Thirty percent of visitors stay within Letchworth State Park either at the Glen Iris, park campgrounds or special housing (e.g. Maplewood Lodge, Chalet, etc). Staying with friends and family was the third most cited place to stay (20%), followed by vacation rentals and Airbnb (5%) and campgrounds (4%). “Other accommodation” in the comments sections referred to summer cottages.

Where Visitors Stay



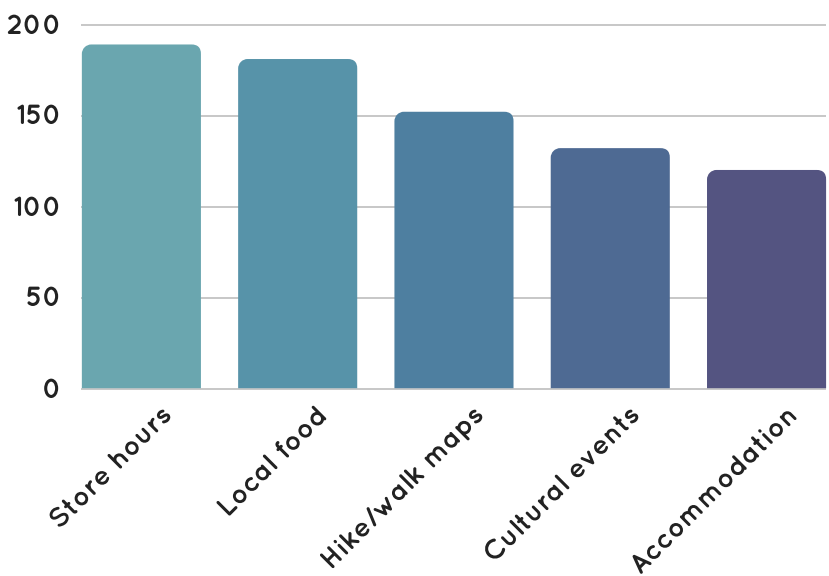
HOW CAN WE ENHANCE THE VISITOR EXPERIENCE?

Improvements visitors would like to see

Visitors were asked to rate 15 items about our area as needing improvement, not needing improvement, or not important to me. Options presented in the survey came from informal interviews conducted with local residents and SUNY Geneseo students about what they felt were this region’s weaknesses in attracting visitors.

Overall visitors are generally satisfied with their experience to the area and what is already on offer. Top items cited for improvement included stores open weekends, evenings and late night; farm-to-table and local cuisine options; maps of hiking and walking trails; cultural events; and accommodation options.

Top 5 Improvements Needed



List of Amenities
Offered for Survey
Response

- **Local transportation options**
- e.g., cabs, rideshare, shuttles
- **Accommodation options** -
e.g., hotel, AirBnB, "glamping"
- **Stores open weekends, evenings, late night**
- **Cultural events** - e.g., festivals, beer/wine tastings, food tours
- **Online visitor information/central website**
- **Maps of hiking and walking trails**
- **Specialty retail/souvenir shops**
- **Local wineries & craft breweries**
- **Guided tours**
- **Live entertainment**
- **Spa/wellness services**
- **Directional signage**
- **Parking**
- **Bicycle-friendly facilities, trails and roadways**
- **Restaurants featuring local cuisine and farm-to-table produce**

"Local businesses need to draw better attention to themselves. Hours need to support tourism, (weekend and evening) if you want people to come and stay overnight."

Store hours

Visitors' top area for improvement was store hour accessibility. An evaluation of store hours in the main street districts of Geneseo, Mount Morris and Perry shows that very few specialty stores and restaurants are open on Sundays meaning that weekend visitors have limited options for dining and shopping – key reasons for spending time in our communities.

In interviews with hotel management, staff related wedding parties' frustration with the lack of brunch options on the weekends. Likewise for travelers getting in late at night there are few places to get a meal or drink after 10 pm if staying in Perry or Mount Morris. For Letchworth day-trippers interested in shopping in the downtown areas after visiting the park, few stores are open after 5 pm.

Table 1: Tourism-related Store Hours ⁽¹⁸⁾
(e.g. restaurants, cafes, specialty retail)

	Perry (56 businesses)	Mount Morris (46 businesses)	Geneseo (62 businesses)
Open Sundays	33%	51%	50%
After 5 pm (more than one day/ week)	42%	40%	61%
Late night (after 10 pm)	3%	4%	23%

(18) Data current as of December 2017 for tourism-related stores such as restaurants, cafes, and specialty retail. Important to note that late night (after 10pm) and open Sundays are often contingent upon seasonality (e.g. when SUNY Geneseo is in session, summertime and holiday shopping season)

Restaurants featuring local cuisine and farm-to-table

The second highest rated area for improvement dealt with the availability of restaurants serving local or farm-to-table cuisine. Across the three communities there are only three restaurants that have an intentional focus on using local products and market this openly. Respondents also indicated in the open comments section a desire for healthier eating options, more craft breweries and maps of local farm stands and farmer's markets.

Table 2: Diversity of Restaurant Options ⁽¹⁹⁾

	Perry	Mount Morris	Geneseo
Fast food/chain	4	10	23
Diner	3	1	3
Local cuisine/farm to table	1	2	0
Café/bakery	2	3	5
Fine dining	2	1	1
Casual dining (bar & grill)	4	3	5
Ethnic/international	1	1	3
Healthy/vegetarian/gluten-free	0	1	4

"Need better and improved food variety, Paleo and gluten free friendly and not just Wegmans as a solution. Food is terrible. All grease and fried stuff. Times have changed."

"Love the Silver Lake Institute Experience—area should do more of these cultural events."

Cultural events (festivals, beer/wine tastings, food tours)

Related to more locally-focused and sourced cuisine, visitors also highlighted the need to improve events and experiences celebrating local food and culture. In the open-ended comments section respondents cited the live music events at Finger Lakes wineries as a good model, opportunities to tour local farms, and suggestions for more tasting events/outlets in the surrounding communities. Others commented on the quality of the Silver Lake Institute's summer programming in 2017 and the Shake on the Lake performances and suggestions for more intellectual and cultural events of that caliber.

(19) Some restaurants reviewed fit into multiple categories and are counted more than once (e.g. The Hole in the Wall Restaurant is categorized as farm-to-table, fine-dining, and casual dining). Data current as of December 2017.

"Maps need improvement—trail rating and description, detail."

"Geneseo needs more accommodation options. We already had to book a year in advance for parents' weekend."

"Five years ago we did not have to have a reservation and we could camp any weekend we wanted to [at Letchworth State Park]. Recently the popularity of camping has skyrocketed and it would be nice if you could expand to accommodate more people!!!"

Better hiking maps

Visitors to the park and surrounding areas frequently highlighted the need for better hiking maps – specifically trail ratings and descriptions of trail features like terrain, points of interest, length and level of difficulty.

In intercept interviews with SUNY Geneseo students, several students voiced frustration with the lack of information on trails in the surrounding communities like Fallbrook (Geneseo) and Sonyea State Forest (Mount Morris) and difficulty in locating trailheads in Letchworth State Park. Other comments highlighted the need for better information on dog and horse-friendly trail options.

Related to hiking maps survey respondents also cited the need for more information on bike trails and recommended itineraries.

Accommodation

Respondents' main concerns with accommodation had to do with the difficulty in obtaining it during the high season – especially summer. Open-ended comments noted the difficulty in getting accommodation in the park now that its popularity has increased. Difficulty in securing accommodation was also noted by some SUNY Geneseo parents who had trouble booking accommodation in Geneseo during summer orientation sessions and who were not aware of alternative options in surrounding communities.

(20) Data current as of December 2017 for tourism-related stores such as restaurants, cafes, and specialty retail. Important to note that late night (after 10pm) and open Sundays are often contingent upon seasonality (e.g. when SUNY Geneseo is in session, summertime and holiday shopping season)

Table 3: Accommodation Options (20)

	Perry	Mount Morris	Geneseo
Hotel/motel	1	1	4
B&B/inn	1	2	5
Campground	1 (Silver Lake)	1	0 (village) 1 (Conesus Lake)
AirBnB/VRBO	15	3	5 (village) 70 (Conesus Lake)
Hipcamp	0	0	0
Glamping	0	0	0

Other comments regarding accommodation focused on the quality of experience at Letchworth State Park's cabin sites (which indicated a preference for more privacy and spacing between cabins) and the desire for more information available online about cabin amenities prior to booking. Several respondents commented on the need for more dog-friendly accommodation.

Other characteristics

People were generally satisfied with parking, directional signage and online visitor information. The top things people rated as not important included spa and wellness services and local transportation options (e.g., ride-sharing services like Uber, bus shuttles, or taxis).

While people were generally satisfied with online visitor information, in the comments sections visitors cited the need for better information online indicating which park entrances provide access to specific parts of the park, along with trail and pool closures. Travelers expressed disappointment with the lack of healthy eating options, souvenir shops, specialty stores and clothing boutiques in the surrounding communities. The need for Wi-Fi and improved broadband connectivity in the area appeared several times in open-ended comments. Respondents also commented on the need for better airport transportation to the area from Rochester and Buffalo.

"More site-specific info online when choosing a campsite at Letchworth."

"We were disappointed with the lack of specialty shops in the downtown areas."

"We visited several villages and were so disappointed that we didn't find one gift shop that sold local souvenirs like t-shirts, ornaments. We travel all over NY camping and have never had this hard of a time finding a memento."

Top Sources of Trip Planning and Travel Information

75%

**General Internet
research**

63%

**Word of mouth
and local
recommendations**

50%

**Consumer review
sites**

WHAT IS THE BEST WAY TO COMMUNICATE WITH VISITORS?

The primary ways survey respondents learned about Letchworth State Park and the surrounding area was through **word of mouth (33%)** and **previous visits to the area (58%)**.

When asked what sources visitors use when traveling or planning a trip, **the majority (75%) cited general Internet research as a resource.**

Other highly ranked sources included **word of mouth/local recommendations (63%)** and **consumer review sites like Yelp or TripAdvisor (50%)**. In the “Other” section, respondents commented that they used Facebook and Google reviews to inform travel decision-making.

When looking across specific market segments we observed the following:

- Customer review sites are more important to overnight visitors (57%), out-of-state and international visitors (58%), Gen X/Millennials (57%), and visitors with household incomes exceeding \$100,000 (63%) than to the sample as a whole (50%). Day visitors use these sites less frequently (41%), but still significantly.
- Word of mouth and local recommendations are important across all categories (from 61% to 65%).
- General Internet research is the most important source of information (75%), and this is consistent across visitor segments. This finding may be skewed by the preponderance of respondents who learned about the survey through social media, however travel industry data analyzed by Google and others also found that 75% of travelers use Internet searches to plan and book their travel. (21)

(21) Google Travel Study, June 2014, Ipsos MediaCT, p.10.
(https://storage.googleapis.com/think/docs/2014-travelers-road-to-decision_research_studies.pdf)

MARKET SEGMENT ANALYSIS

To better understand how local gateway communities can maximize economic opportunities related to travel and tourism in the region, we broke out some segments of respondents that represent higher-value or under-represented parts of the current visitor market.

We looked at five key segments:(22)

- **Overnight visitors** (longer stays and higher daily spending make them an attractive visitor segment)
- **Generation X and Millennials** (these younger travelers are the future of visitation)
- **Baby Boomers and older** (Baby Boomers are the best-represented generation among visitors, and represent our area's "traditional" visitors)
- **\$100,000+ household income** (this is a high-value visitor segment with higher incomes that can translate into more travel spending)
- **Monroe and Erie** county visitors (these close-by communities are natural visitor markets).

(22) Some of these segments overlap with each other, but each provides an interesting way to explore the characteristics and preferences of parts of the visitor market.

MARKET SEGMENT CHARACTERISTICS

Among these visitor segments, overnight visitation is strongest among older, more affluent visitors. GenX and Millennials tend to be day visitors, and so do visitors from nearby Monroe and Erie counties. Letchworth State Park is an important draw for all categories of visitors. Day visitors are more likely to be repeat visitors than are overnight travelers.

Table 4: Visit Characteristics by Market Segment

	Visiting Letchworth SP this trip	Have visited LSP before	Day trip	Overnight
Overnight visitor	80%	46%		
Day visitor	74%	85%		
Gen X and younger—born 1965 or later	77%	74%	66%	34%
Baby Boom and older—born before 1965	85%	69%	43%	57%
Monroe + Erie County	71%	75%	76%	24%
\$100,000+ house- hold income	64%	64%	48%	52%

Letchworth State Park also figures strongly as a primary motivation for visiting for all segments, though it is less important for overnight and more affluent visitors than for other categories. Visiting friends and family is important across categories, except for nearby Monroe and Erie county visitors. In the “event/other reason” category, common responses included student orientation and other events related to SUNY Geneseo; family events such as weddings, reunions, and anniversaries; and community arts and cultural events.

Table 5: Reasons for Visiting by Market Segment

	Letchworth State Park	Visiting friends and family	Recreation	Vacation	Event /other
Overnight visitor	30%	23%	4%	17%	23%
Day visitor	46%	15%	17%	0%	19%
Gen X and younger—born 1965 or later	41%	23%	15%	5%	14%
Baby Boom and older—born before 1965	40%	16%	9%	11%	20%
Monroe + Erie County	37%	1%	14%	3%	29%
\$100,000+ house- hold income	31%	22%	8%	7%	29%

Compared to all overnight visitors, the small sample of overnight visitors from Monroe and Erie counties appears significantly more likely to stay in Letchworth State Park. Staying with friends or family is relatively more popular with GenX and Millennial visitors, and with those from Monroe and Erie counties. Visitors with annual household incomes over \$100,000 are much more likely to stay in a hotel or inn outside the park than overnight visitors as a whole and than any other segment.

Table 6: Lodging by Market Segment

	Letchworth State Park	Friends or family	Hotel or inn	Vacation rental or AirBnB	Camp- ground
Overnight visitor	30%	20%	37%	5%	4%
Gen X and younger—born 1965 or later	33%	53%	34%	4%	4%
Baby Boom and older—born before 1965	32%	21%	35%	3%	7%
Monroe + Erie County	64%	45%	27%	5%	0%
\$100,000+ house- hold income	11%	26%	59%	7%	7%

Table 7: Importance of Word of Mouth and Previous Visits by Market Segment

	Word of mouth	Visited before
Overnight visitor	29%	45%
Day visitor	38%	72%
Gen X and younger—born 1965 or later	46%	63%
Baby Boom and older—born before 1965	19%	61%
Monroe + Erie County	27%	71%
\$100,000+ household income	36%	63%

In keeping with the overall survey findings, word of mouth and previous visits were the most prevalent ways in which survey respondents learned about the park and the surrounding area. Previous visits are relatively more important to day visitors (72%) and Monroe and Erie county visitors (71%) than to the sample as a whole (58%). Word of mouth is more important for GenX and Millennials (46%) than for the sample as a whole (33%), while it is significantly less important for older visitors (19%).

MARKET SEGMENT PREFERENCES

We used these visitor segments to look at preferences in three response categories: Information sources used for trip planning, what visitors value most about the area, and what our area could do to improve the visitor experience.

How visitors plan their trips

The findings from drilling down into the market segments closely parallel the analysis of trip-planning information sources offered above, and offers some additional insights into how to target the content of certain information sources that are more popular with some segments than with others. For example, older visitors (59%) and overnight visitors (49%) make the most use of print brochures, while customer review sites are most often used by overnight visitors (57%), GenX and Millennials (57%), and higher-income travelers (63%).

Table 8: Travel and Trip-Planning Information Sources by Market Segment

	Customer review site	Travel booking site	Print brochure	Word of mouth/ local recomm.	AAA	Walking around	General Internet search
Overnight visitor	57%	30%	49%	61%	18%	32%	73%
Day visitor	41%	23%	43%	62%	24%	49%	75%
Gen X and younger—born 1965 or later	57%	25%	34%	62%	14%	48%	72%
Baby Boom and older—born before 1965	38%	27%	59%	59%	30%	35%	73%
Monroe + Erie County	44%	16%	38%	55%	19%	38%	71%
\$100,000+ household income	63%	36%	40%	72%	22%	46%	83%

WHAT VISITOR SEGMENTS VALUE ABOUT THE LETCHWORTH REGION

As noted earlier in this report, there is broad agreement on the importance of some of this area's defining characteristics among visitors. Scenic beauty, outdoor recreation, and affordability all received broad "very important" rankings across the five focal market segments. Proximity to larger urban centers such as Buffalo and Rochester received universally high "not important" responses, except among visitors from Erie and Monroe counties.

The region's rural, small-town character and historic main streets and attractions were also deemed important across the board, but tended to exhibit more of a mix of "moderately important" and "very important" responses. Interestingly, Gen X and Millennials tended to place less emphasis on these characteristics than other segments.

The uncrowded, easy-access nature of the Letchworth area was also appealing across the board, but especially so for visitors from Monroe and Erie counties, 72 percent of whom ranked this characteristic as moderately or very important.

These market segments value the region's historical and cultural attractions, but tended to rank it less highly than the other valued characteristics. The exception is the \$100,000+ household income segment, for which historical and cultural attractions ranked on par with historic main streets and somewhat more highly than rural and small-town character.

WHAT MARKET SEGMENTS WANT TO SEE IMPROVED TO ENHANCE THE VISITOR EXPERIENCE

Table 9 on the next page shows the items on which any of the five focal visitor segments registered 33 percent or greater assessment that the attribute needs improvement.

In addition to highlighting areas of broad agreement that could help prioritize local strategy, investment and effort toward enhancing the experience of travelers, the **table also points out that three of these target market segments are particularly selective, expressing strong preferences about what they would like to see the region do better.** The preferences expressed by high-income travelers, visitors from Monroe and Erie counties, and Gen X and Millennials offer a road map for attracting these desirable travelers.

Table 9: Summary of Needed Improvements by Market Segment

	\$100,000+ household income	Over- night visitor	Gen X and younger	Baby Boom and older	Monroe + Erie counties
Local food restaurants	57%	39%	42%	41%	41%
Stores open weekends & evenings	60%	41%	51%	32%	51%
Maps of hiking/walking trails	46%		40%		41%
Cultural events	52%		33%		35%
Bicycle friendliness	49%				38%
Live entertainment	46%		34%		
Accommodation options	45%				35%
Local wineries & breweries			35%	32%	
Local transportation options			33%		
Online visitor info/ central website	46%				

* Note: Accommodation options are among the top five areas of improvement identified by the entire survey sample. Within this analysis of five market segments, Monroe and Erie county residents and higher-income visitors identified it as a particularly high priority. See Appendix B: Comparison Tables for detail on these responses.



Photo: Filip Mroz

CHALLENGES & OPPORTUNITIES

Key insights from the overall survey findings and market segment analysis highlight the following challenges and opportunities for Letchworth's gateway communities:

PRIMARY CHALLENGES FOR LETCHWORTH'S GATEWAY COMMUNITIES

An aging visitor market

One of the principal challenges the survey highlights is the fact that the majority of our 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 stemming depopulation by exposing our area to new residents and businesses.

Needed amenities in Letchworth's gateway communities to grow high-return and younger market segments

Getting visitors to stay longer in our communities as well as attracting high-return and strategic market segments is important for future economic growth and sustainability. In order to do this, gateway municipalities will need to improve a number of amenities to encourage longer visitation:

- **More convenient shopping hours**

Across all segments, visitors cited the need for store hours that better align with consumer needs. For example, having a limited number of stores and restaurants open on Sundays makes it challenging to entice visitors to stay through the weekend.

- **More local food, accommodation and cultural experiences**

High value market segments like \$100,000 income households, Gen X and Millennials have more discerning tastes and requirements around the visitor experience especially related to accommodation, farm-to-table cuisine, healthier eating options and local cultural experiences (e.g., festivals, beer/wine tastings, food tours). In order to encourage longer stays among higher-value segments, municipal leaders, investors, property owners and entrepreneurs need to be collaborative and strategic about what types of new businesses and events to develop in each of their districts in order to increase these amenities across the three gateway communities.

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

With 75% of visitors using the Internet to plan their travel and make decisions about where to eat, sleep and explore, improving our region's digital footprint remains a key priority moving forward (see Table 10 below). Fifty percent of survey respondents also cited consumer review sites like TripAdvisor.com and Yelp as important sources for travel information.

These survey findings align with broader travel market research, which indicates that nine out of ten travelers think that reading online reviews is important and 95% of travelers trust the reviews they read.⁽²³⁾ This is particularly true for Millennials who indicate that friend and peer recommendations via social media networks are more important than travel agent advice.⁽²⁴⁾

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 (see Table 10 below). Improving local businesses' capacity to use digital marketing remains critical for improving their visibility to visitors coming to the area.

Table 10: Online Presence of Tourism Businesses ⁽²⁵⁾

	Perry (87 businesses)	Mount Morris (72 businesses)	Geneseo (111 businesses)
Website	57%	48%	82%
Facebook	48%	58%	73%
Yelp verified	16%	28%	34%
Google verified	30%	42%	61%
Trip advisor verified	11%	11%	14%

9 of 10
travelers think
that reading
online reviews is
important.

95%
of travelers trust
the reviews they
read.

(23) Trekk Soft 2018 Travel Trends Report

(24) TopDeck Travel Survey 2016

(25) Data current as of December 2017. Only tourism-related businesses counted (e.g. accommodation, convenience stores/gas stations, food, specialty retail, attractions)



Tour de Perry

Current marketing efforts focus heavily on costly print brochures and flyers produced across an array of organizations and distributed to park visitors with various degrees of consistency throughout the year. While comprehensive, the sheer volume of options is difficult for visitors unfamiliar with the area to navigate.

The method of putting all businesses and attractions in multiple publications means that the content is not tailored to specific market segments, essentially speaking to everyone and no one at the same time. It takes into account local business interests for advertising but not the experience of the traveler.

Tracking the impact of print materials is also difficult as there are few reliable ways to measure whether advertisements in a brochure motivated people to patronize a business. Compare this with social media sites like Yelp or Trip Advisor that can track online traffic to specific listings, patron “check-ins,” and consumer reviews. What is more, these sites are free of charge and can boost businesses’ visibility when managed properly.

OPPORTUNITIES FOR THE LETCHWORTH GATEWAY REGION

Right now there is strong alignment between market trends in travel and tourism, demographic shifts in neighboring urban markets and our regional assets that make this an opportune time to pursue sustainable tourism as a regional economic development strategy.

The following are some of the key market opportunities for Letchworth’s gateway communities to consider in both the near and long term.

PROMISING MARKET TRENDS

The rise of experiential travel

Experiential travel is a form of tourism in which people focus on experiencing a country, city or particular place by connecting to its history, people and culture.(26) Typically this is more immersive, local, adventurous or active travel. This form of travel continues to gain popularity as both young and mature travelers seek experiences that can change them and offer new, unique and authentic ways to understand the world.

Examples of popular experiential travel include food tourism, spiritual/wellness retreats, exploring off-the-beaten track locations or learning something new like brewing craft beer or photography. Given the region's colorful history, artistic legacy, and growing craft beer culture, Letchworth's gateway villages are full of opportunities to curate offbeat and interesting itineraries and experiences for visitors.

Millennial market power

As urbanization continues to grow and the cost of living in popular cities like New York and San Francisco skyrocket, Millennials are increasingly flocking to mid-size cities in the U.S. in search of more affordable living and professional growth opportunities. In a 2017 article published by Time Magazine, Buffalo, New York ranked #12 in a list of the top 25 cities in the U.S. currently attracting Millennials.(27)

Neighboring Rochester has also seen a boost in the number of Millennials moving to the area. Census data shows Rochester's population among 20-to-34 year olds grew by 8.8% from 2010 to 2015, more than any other city in upstate New York, surpassing the national growth of 6.1%.(28)

In a 2017 Time Magazine report, Buffalo, New York, ranked #12 on a list of the top 25 cities attracting Millennials.

Rochester's population of 20-34 year olds grew by 8.8% from 2010 to 2015, faster than any other city in upstate New York.

(26) Fugle, L. (2016). The rise of experiential travel and its impact on tours and activities. Trekk Soft.

(27) Johnson, D. (June 2017). The 25 Cities Where Millennials are Moving. Time Magazine.

(28) U.S. Census Data 2010-2015.

"Recharging in nature is the top experiential travel trend predicted for 2018"

Why Millennials matter for travel and tourism

As the largest generation to date, Millennials are just moving into their prime spending years, which will profoundly shape our economy for years to come. In 2017, Millennials' annual spending power reached \$200 billion and by 2020, Millennials will account for 50% of the workforce.⁽²⁹⁾ Millennials, not surprisingly, constituted the largest travel market in 2017 and continue to drive major travel trends like food tourism, sustainability and experiential travel.⁽³⁰⁾ As the first generation of digital natives, Millennials' reliance on technology has also meant a desire to escape it and unplug in remote and off-the-beaten track locations. As such, recharging in nature is the top experiential travel trend predicted for 2018.⁽³¹⁾

Millennial market potential for Letchworth Gateway Villages

The most active conversations on Rochester and Buffalo social media platforms like Trip Advisor, Meet-ups and Yelp are about outdoor recreation, hiking, nature, food, wineries, breweries, yoga, biking, running, kayaking and canoeing. This reflects an active interest in and demand for these types of activities among consumers and users of these platforms.

With Rochester and Buffalo constituting our strongest visitor market, this alignment between Millennial travel preferences and their increasing migration to these urban centers presents a compelling opportunity for Letchworth's gateway communities to become the destination for these types of activities.

(29) PricewaterhouseCoopers (PwC), "Millennials at Work: Reshaping the Workplace."

(30) Skift Report, Megatrends Defining Travel in 2017

(31) Trekk Soft 2018 Travel Trends Report

Table 11: MeetUp (32)

	Rochester		Buffalo	
	Groups	Members	Groups	Members
Outdoor recreation	50	17,600	29	16,700
Hiking	33	18,900	38	18,200
Yoga/Pilates/meditation	26	7,700	26	9,100
Wine	20	7,700	25	6,400
Biking	18	6,600	16	7,100

Table 12: Yelp (Most Reviewed Listings) (33)

	Rochester		Buffalo	
	Listings	Reviews	Listings	Reviews
Breweries	20	1,054	13	1,651
Farm to table	11	2,390	32	2,315
Hiking	49	165	66	154
Yoga	101	192	126	224
Canoeing	84	70	93	84
Boating	40	84	84	384
Vineyards	14	74	75	56

Table 13: TripAdvisor (Top Things to Do) (34)

	Rochester		Buffalo	
	Listings	Reviews	Listings	Reviews
Outdoor activities	19	1,400	25	2,390
Nature & parks	21	2,428	19	1,460
Boat tours & water sports	6	59	11	1,971
Food & drink	20	1,178	10	259
Biking	3	135	3	508



Gemma Evans

(32) Meetup: www.meetup.com

(33) Yelp.com search using "most reviewed" filter.

(34) TripAdvisor.com search using "top things to do" query.

Many visitors have family traditions and occasions that keep them coming back.

Catering to, continuing and celebrating these traditions may be an interesting promotion strategy to perpetuate the cycle of repeat visitation.

Multigenerational travel

Aside from visiting Letchworth State Park, visiting family was the second primary reason visitors come to our area.

According to travel industry data for 2016-17, multigenerational travel has become one of the fastest growing trends in the industry.(35)

Defined as a trip that includes three or more generations of family, multigenerational travel has been popular among luxury travelers for several years and recently increased in popularity among all travelers.(36) One of the drivers of this trend is a growing desire among consumers for experiences, not things. As families are living further away geographically, these trips create the best opportunities to spend quality time together.

Again, this travel trend presents a good market opportunity for our regional strengths. Many visitors have personal connections to the area, and—in addition to strong affinity for the park—have family traditions and occasions that keep them coming back. Catering to, continuing, and celebrating these traditions may be an interesting promotion strategy to perpetuating the cycle of repeat visitation, which is already strong among Gen X/Millennial and Boomer survey respondents.



Photo: Daiga Ellaby

(35) Gelfeld, V. Travel Research: 2017 Travel Trends, November 2016. AARP

(36) Trekk Soft 2017 Travel Trends Report

Unique Accommodation: Airbnb, HipCamp.com and Glamping

Letchworth's gateway communities have an abundance of beautiful, historic homes, cabins, cottages and barns as well as undeveloped properties with awe-inspiring vistas. These assets align with Millennial/GenX and Boomer demand for unique accommodation that allow for a more authentic and immersive travel experience.

With the growing popularity of online hospitality platforms like **Airbnb** and **VRBO**, homeowners with beautiful properties can take advantage of these market opportunities by leasing or renting vacation and short-term lodging. New online platforms like **HipCamp.com** allow property owners to earn extra revenue by sharing undeveloped land with campers using a similar booking process as Airbnb.

Glamping is another market opportunity for local entrepreneurs with beautiful properties. Glamping is a fusion of luxury accommodation and camping that allows travelers to be outside in nature without having to sacrifice comfort. Glamping providers are able to charge more for accommodation because of the amenities, however it is still typically a more affordable option than staying in a B&B or hotel. This accommodation trend aligns well with market segments like Millennials, who want a unique and affordable experience.



Photo: Google

Food typically represents the highest percentage of traveler spending (44%).



Photo: Silver Lake Brewing Project

Why accommodation matters

Airbnb, Hipcamp and Glamping create new entrepreneurial opportunities for enterprising individuals without the same barriers to entry and levels of risk associated with more traditional types of businesses. They allow a flexible way for homeowners to diversify income from an existing home or property. In New York State, several counties including Livingston and Wyoming are able to collect occupancy tax on Airbnb rentals, making this a potentially important source of additional county tax revenue.

In places like Wyoming County where there is a lack of traditional accommodation (and therefore occupancy tax), Airbnb and similar platforms could be a viable solution for entrepreneurs and tourism to work together to increase county tax revenues.

Food tourism

Local food and food tourism have become big business over the past decade. A 2012 Skift market study found tourism spending on food services in the U.S. topped \$201 billion, nearly a quarter of all travel income.⁽³⁷⁾ Food also typically represents the highest percentage of traveler spending (44%).⁽³⁸⁾

Food tourism is defined as “the pursuit of unique and memorable eating and drinking experiences that reflects the local cuisine, heritage, or culture of a place.”⁽³⁹⁾ Perhaps what is most exciting for rural communities is that food tourism experiences don’t exclusively refer to dining out. Food markets, tasting sessions, cooking lessons, and visits to farms or vineyards now make up 95% of all food experiences.⁽⁴⁰⁾

Leveraging our agricultural strengths

Agriculture is a leading industry for the counties surrounding Letchworth State Park. We share many of the agricultural assets that put New York’s Finger Lakes wine region on the map. Natural strengths in producing dairy, apples, maple syrup, hops, wine and other craft beverage position our region to leverage food tourism to drive new areas of economic growth.

⁽³⁷⁾ Skift Report 2017: How the Food Economy Drives Sustainable Tourism Development.

⁽³⁸⁾ NYS Tourism Economics, Finger Lakes Focus (2016).

⁽³⁹⁾ Ontario Culinary Tourism Alliance: <https://ontarioculinary.com/>

⁽⁴⁰⁾ Skift Report 2015: The Big Business of Food Tourism and Why it Matters.

CASE STUDY: GENEVA

Several decades ago, the Finger Lakes Region doubled down on its unique wine, beer and spirit assets. Today that intentional focus on food and wine is yielding big results, including being named among the top wine destinations in the world.⁽⁴¹⁾ Geneva, which sits at the top of Seneca Lake, has quickly emerged in the past five years as one of the region's most exciting food and drink destinations. Home to restaurants like FLX Table, named the country's best new restaurant in the 2016 USA Today 10 Best Reader's Choice poll,⁽⁴²⁾ Geneva is an example of how rural areas can leverage regional strengths with important global trends like food tourism.

The movement started in 2007 when Geneva's first farm-to-table gastro pub, the Red Dove Tavern, opened. Different from other restaurants at the time, the Tavern focused on seasonal, local fare and craft beer. Within ten years Red Dove was joined by other distinctive food and beverage ventures like Cebo, the Linden Street Social Club, Kindred Fare, Lake Drum Brewing and Microclimate. In a D&C article written on Geneva's food scene, restaurateurs like Chris Bates of FLX Table cite the critical mass of food entrepreneurs in Geneva as one of the draws for deciding to start a restaurant there.⁽⁴³⁾ The area's proximity to agriculture, Finger Lakes wineries and education and training resources, like the Viticulture and Wine Center and Cornell's New York State Agricultural Experiment Station, also provide a supportive ecosystem that bolsters new ventures and drives food innovation.

With the momentum started by the city's first food entrepreneurs, city planners saw food and agriculture as an important vehicle for driving innovation and helping create both the high-skill jobs to attract new top talent and middle-skill jobs to combat the city's poverty and unemployment.⁽⁴⁴⁾ As a result Geneva made food and beverage a central part of the city's Downtown Revitalization strategy which won them a \$10 million grant from New York State's Downtown Revitalization Initiative in 2016.

(41) Wine Enthusiast 2015.

(42) Schuhmacher, T. "Geneva's FLX Table named country's best new restaurant," January 2017. Democrat & Chronicle.

(43) Schuhmacher, T. "Geneva emerging as a food and drink destination," August 2016. Democrat & Chronicle:

(44s) DRI Geneva Downtown Vision Plan, February 2017:

*Geneva's
Musselman
Triathlon attracts
nearly 2,000
visitors annually for
an overall
economic impact
of \$4.3 million.*

Increasing niche events that leverage our natural assets

Marathons and competitive events like triathlons, criterium (crit) bike races and Iron Man competitions are another growing trend in travel. These types of niche events help destinations attract hundreds to thousands of visitors, who often stay longer and spend more than the typical guest.⁽⁴⁵⁾ In Geneva, New York, the Musselman Triathlon, considered a small event, attracts nearly 2,000 visitors to the area for an overall economic impact of \$4.3 million.⁽⁴⁶⁾

The Oak Tree Half Marathon, held in Geneseo for the past 10 years, consistently draws over 700 runners to the area during Labor Day weekend. Over the years, the race has attracted runners from 12 different states and Canada.⁽⁴⁷⁾ While there are many reasons runners participate, the number one reason cited is the quality and uniqueness of the experience – specifically the beauty and challenge of the course.⁽⁴⁸⁾

In Perry, plans are underway to launch a triathlon around Silver Lake in June 2019. Organizers estimate the event could bring in half a million dollars to the local economy in the first year.

Increasing and continuing to support these types of niche events is another promising strategy for gateway communities to leverage the region's natural assets (e.g. scenic beauty, nature, outdoor recreation) while attracting high-return market segments that in turn help sustain these assets.

(45) Shankman, S. "Runners and marathons become big business for destinations," August 2014. Skift.

(46) Musselman Triathlon: Economic Impact, December 2012.

(47) Benjamin Gajewski, Executive Director, Genesee Valley Conservancy and Oak Tree Co-Founder.

(48) LCV intercept surveys conducted at 2017 Oak Tree Half Marathon

RECOMMENDATIONS

SHORT-TERM

There are a number of actions in the near term that businesses, tourism promotion groups and leaders in the gateway communities can pursue to address the challenges and opportunities highlighted in this report.

Many of these recommendations cut across multiple stakeholder groups and will require collaboration, coordination and funding beyond the Letchworth Gateway Villages Initiative for implementation. A summary of these recommended actions along with timelines, key partners and estimated costs is included in **Appendix A**.

DESTINATION CAPACITY BUILDING

Local residents and businesses are the most important ambassadors for a destination. As highlighted in the survey data visitors depend most on online information (75%) and word of mouth (63%) when planning or making travel decisions.

Ensuring that businesses and locals have the knowledge needed to be destination ambassadors, both online and off, will be a key priority for municipalities moving forward.

For Technical Assistance Providers and Local Businesses

Raising awareness of local businesses about the benefits of digital marketing, coupled with technical assistance and coaching support, can go a long way in helping businesses improve their visibility to visitor markets.

There are already a number of local efforts underway to support businesses expansion to digital marketing, including SUNY Geneseo's Adopt-a-Business Program and training provided by the county Chambers of Commerce and Tourism.



Photo: Antonio Grosz

RECOMMENDED AREAS OF FOCUS FOR TECHNICAL ASSISTANCE PROVIDERS AND LOCAL BUSINESSES

1) SEO, search-driven platforms and customer reviews: It is clear from the data that online information and customer review sites like TripAdvisor are important sources consumers (particularly Millennials and Gen X segments) use to research and plan their travel. This will only continue to grow. Ensuring tourism-related businesses become fluent in the use of these platforms and their analytics is critical for improving their visibility and connection to these markets. Each platform's analytics can also help businesses to determine their optimal hours of operation.

2) Paid Internet advertising: The importance of Internet research as a source of information across visitor segments suggests that Google, Facebook, and other Internet ads might be an effective and low-cost way to reach potential visitors.

3) Customer Relationship Management (CRM) and email marketing: Given the high levels of repeat visitation the area receives, businesses have a great opportunity to stay connected with visitors throughout the year – especially those in nearby markets like Rochester and Buffalo. Email marketing and CRM tools are cost-effective ways for businesses to achieve this type of ongoing engagement and track impact.

4) E-Commerce and Omni-channel retail: Augmenting in-store shopping experiences for visitors with the opportunity to purchase goods online can help businesses extend their customer base beyond the local region. This is particularly true for SUNY Geneseo students and their parents who will connect with local businesses multiple times over the course of four years and who may continue that relationship as alumni. E-commerce is an important tool to help facilitate this kind of ongoing customer engagement and extend local businesses' brand to new markets.

5) Familiarization Training: The importance of word of mouth and local recommendations suggests that enhancing familiarization trainings and online resources for frontline staff could be effective ways for businesses to improve marketing to outside visitors.

CASE STUDY:

E-COMMERCE IN WELLSVILLE, NEW YORK

Trend Addictions and New Vogue in Wellsville, New York, are two examples of small town boutiques extending their customer base through e-commerce. The owners of each respective boutique use Shopify, an e-Commerce solution for entrepreneurs selling online and in-store. Shopify's platform presents business owners with no design or web development experience an "out-of-the-box" digital solution that handles everything from online marketing to managing the logistics for payments, secure checkout and shipping.

As in other small towns in the region, locals do not constitute a large enough customer base to keep these types of stores in business. New Vogue's owner indicated that the majority of her customers are from out-of-town, and learn about her store while visiting for a funeral or other family occasion. Visitors are often surprised she has the same designer items at a fraction of the cost one would find in New York City. With her e-commerce platform, she has been able to convert visitors into online customers, offsetting the challenge of sustaining her business with only a local customer base.



Photo: Trend Addictions

RECOMMENDATIONS FOR LOCAL RESIDENTS AND COMMUNITY GROUPS

Local residents are the best sources of information when it comes to helping visitors connect with unique and off-the-beaten track experiences in our area. By writing reviews and sharing the things they love on popular social media platforms like Yelp, Google's Local Guides and Facebook, locals can help visitors discover what makes our area special and drive business to our communities.

With the growing popularity of online hospitality platforms like **Airbnb** and **HipCamp.com**, homeowners with beautiful properties can take advantage of these market opportunities by leasing or renting vacation and short-term lodging.

While these platforms have the potential to create new entrepreneurial opportunities for enterprising individuals there is also a lot to be learned from more advanced markets on the best way to encourage this type of business activity.

This includes discussion on **proper zoning, hosting best practice, and policies to mitigate negative externalities and abuse** (i.e. homes bought for the sole purpose of generating income which then restrict local housing inventory and inflate real estate markets).



Photo: Letchworth Gateway Villages

RECOMMENDATIONS FOR LGV RESIDENTS, MAIN STREET ASSOCIATIONS AND OUTDOOR RECREATION CLUBS

(As part of National Tourism Week May 6-12, 2018)

Launch a community mobilization campaign encouraging people to share their favorite things to do, see and eat in the gateway communities on social media platforms used by target markets (e.g. Yelp and TripAdvisor). Host training clinics to help residents learn how to use different platforms and write effective reviews.

Encourage local hiking enthusiasts to use digital app platforms to improve visibility for local hiking and biking trails. One of the top items for improvement included improved hiking and biking trail maps and information. There are a number of digital apps like REI's Hiking Project and All Trails that allow people to map, record and rate their hikes. By mobilizing locals and visitors to employ these apps, we can create accurate, up-to-date hiking info generated by users.

Furthermore, the apps are free to use meaning communities can avoid annual printing and graphic design costs that require constant updates. Tourism Promotion Agencies and other organizations can also link to or embed this content on their websites, again minimizing the costs and effort related to producing print maps year after year.

Host workshops and panel discussions on the potential of new tourism-related market opportunities (e.g. Airbnb, Hipcamp, food tourism) for local residents and entrepreneurs. In conjunction with municipal leadership and other key stakeholders, invite subject matter experts and entrepreneurs involved in these market activities to share their expertise and help inform stakeholders on the necessary requirements for success (e.g. zoning and policy, quality standards, labor, workforce development & training needs, financing and investment).

BRANDING AND MARKETING

With attractive places and quality of life at a premium in today's economy, Letchworth's gateway municipalities have a special opportunity to develop a regional brand identity anchored to the park and the region's natural assets. The areas' proximity to urban markets in Rochester and Buffalo with growing numbers of Millennials, also constitutes an opportunity to attract higher return and younger market segments that will enhance the region's future economic sustainability.

Recommendations for attracting high-value market segments:

- **Develop a regional destination brand anchored to Letchworth State Park**, the outdoors and shared assets across the gateway communities (e.g. hiking, biking, local food, arts and culture, unique history).
- As an extension of the brand, **target advertising and promotion to Millennials/GenX, Monroe/Erie County** and families using key concepts that appeal to them (e.g., scenic, natural, affordable, outdoors, rural). Emphasize proximity to Rochester and Buffalo, unique off-the-beaten track experiences and opportunities to recharge in nature.
- **Work with SUNY Geneseo** to promote Letchworth State Park, lodging options in the Letchworth gateway villages area, and suggested activities and itineraries to parents.
- **Build an image-driven, digital platform focused on Letchworth State Park that links together gateway communities' unique places, attractions and businesses** in a compelling and easy to access online format. Use emotional and authentic imagery to connect Millennial/Gen X markets with the experience of place.
- **Produce digital, self-guided itineraries highlighting local and off-the-beaten track experiences** across Letchworth's gateway communities that visitors can download and listen to from apps like Detour from their smartphones and mobile devices.

CASE STUDY:

THE CATSKILLS RE-BRANDED

The Catskills had long been a summer destination for New York families wanting to get out of the city. However over the past 30 years this tradition waned and the large family resorts memorialized in movies like *Dirty Dancing* closed down. Now the area is seeing a revival as younger generations of travelers seek an affordable escape from the city to recharge in nature and enjoy farm-to-table food culture. In a CNN article published in 2017, business owners and travelers interviewed cite the area's proximity to New York and the sense of discovery in visiting an off-the-beaten track location as the area's special draw.⁽⁴⁹⁾

This revival in large part has been spurred by the region's re-branding effort. In 2013, tourism promotion agencies across four counties (Delaware, Greene, Ulster and Sullivan) banded together to re-brand the region under the Catskill Association for Tourism Services. Working together, the four-county collaboration raised \$270,000 in funding from the state of New York's Regional Economic Development Council to embark on a new marketing strategy to increase visitation to the region.⁽⁵⁰⁾

The tagline "Travel Close, Discover More" and the experience-driven website (www.visitthecatskills.com) focus on the outdoors, farm-to-table and cultural events that appeal to young urbanites escaping the city for a nearby getaway. The Catskills strategic positioning and re-branding present an interesting model for positioning Letchworth's gateway communities as a destination to nearby Rochester and Buffalo markets.

(49) Marvar, A. July, 2017. New York's Catskills see a big vacation revival," CNN.

(50) Catskills Association for Tourism Services Receives \$270,000 Through Regional Economic Development Council Initiative," Focus Media 2013.

RECOMMENDATIONS

MEDIUM TO LONG-TERM

Addressing needed amenities in gateway communities: opportunities for municipal and cross-sector collaboration

Getting visitors to stay longer in our communities as well as attracting high-return and strategic market segments is important for future economic growth and sustainability. Visitors indicated a number of amenities that could be improved to encourage longer visitation including more convenient store hours, farm-to-table/local cuisine, and accommodation options.

Moving forward, Letchworth gateway communities should **prioritize areas of improvement that will appeal to a broad range of visitors** (e.g., farm-to-table restaurants). Where possible, these should connect with the priorities of specific market segments (e.g., build and promote food events and food/cultural events that help fill the gaps perceived by higher-income and younger visitors).

Longer-term investments like developing **food tourism, improving our retail mix in downtown districts or building new types of accommodations** (e.g. Glamping) will require **new types of entrepreneurial capacity, technical assistance, workforce development, financing and investment**. This is a long-term endeavor that provides an opportunity for new types of public/private collaboration.

The preferences expressed by high-income travelers, visitors from Monroe and Erie counties, and Gen X and Millennials offer a road map for attracting these desirable travelers.

RECOMMENDATIONS FOR LEADERSHIP IN THE MEDIUM-TERM

Shepherding in change is not an easy process and requires strong leadership. As municipal leaders invested in the LGV collaboration, there is an opportunity to take an active lead on how best to encourage and incentivize new types of ventures that drive future tourism growth. The following are some of the immediate ways Town and Village leaders (as partners in LGV) can work together to lead change.

Education and Awareness

- Participate in **learning journeys/field experiences (organized by LGV)** to expose municipal leaders and other stakeholders to successful models of food tourism in other areas of New York State (e.g. Geneva and Watkins Glen).
- **Through LGV, connect with professional development and networking opportunities** focused on targeted growth areas (e.g. food tourism, sustainability, digital, new municipal/community financing vehicles related to conservation)
- **Work with LGV to aggregate funding and grant opportunities and other technical assistance resources for entrepreneurs** interested in launching new types of accommodation; or starting other types of tourism-related businesses prioritized in this report (e.g. food, beverage, cultural experiences/events, competitive events).



Photo: Caroline Attwood

RECOMMENDATIONS FOR PUBLIC-PRIVATE ENTITIES & EDUCATION PROVIDERS

Long-term Capacity Building

- **Workforce development in hospitality and service**

To support new tourism-related market opportunities, gateway communities will require a workforce equipped to meet the needs of a growing and competitive hospitality sector. Recruiting and cultivating talent remains the number one challenge for growing business in rural areas. By leveraging existing relationships with the Red Hook District in Brooklyn, the Finger Lakes Wine Region and International programs in Siena, Italy, through SUNY Geneseo, there are opportunities to create professional exchange programs that expose aspiring hospitality professionals to dynamic and competitive environments for food and beverage. Giving hospitality staff this kind of exposure to contexts outside the local area can help inspire and further culinary innovation, knowledge and standards.



Photo: Michael Browning

- **Cultivate new entrepreneurial capacity to address long-term rural economic challenges**

Underpinning the principal challenges highlighted in the visitor survey and report, is the need to cultivate creativity and a new type of entrepreneurial capacity that addresses rural development challenges in 21st century America. To do this requires financial and educational resources to help catalyze innovation, collaboration and seed new ventures.

There are a number of available resources and initiatives underway in the region to address these challenges, however they remain largely disconnected or limited to a specific geographical area. Developing an impact hub or social innovation lab that connects these resources, leverages public/private partnerships and re-focuses them on sustainable rural development solutions could be a strategy moving forward to achieve longer-term impact and cultivate the kind of entrepreneurial mindset needed to re-define today's rural economy.



Photo: Impact Hub Croatia

Table 14: Summary of Recommended Strategies (LGV funded/directed)

Category	Recommended Strategy/Action	Target Group	Implementing Partners	Timeframe	Cost
Destination Capacity Building	Digital Community Mobilization Campaign	Residents, hiking/biking enthusiasts	Adopt-a-Business; Downtown Merchant associations, Promote Geneseo!, TPAs, SUNY Geneseo student clubs	<6 months	<\$2K
	Community workshops (new tourism ventures)	Entrepreneurs, local government, community groups, merchant associations, developers	TPAs, subject matter experts, municipalities	<6 months	<\$2K
Municipal and Cross-sector Collaboration	Learning Journeys/ Field Experiences	Entrepreneurs, municipal & county leaders, private investors, donors, TPAs	Destination businesses and municipalities in Geneva, Watkins Glen or Ithaca (TBD)	<6 months	<\$5K
	Conferences/Professional Networking	Entrepreneurs, municipal & county leaders, investors, TPAs	N/A – LGV to notify target stakeholders of opportunities (e.g. Terroir Symposium Toronto)	<6 months	\$<3K / pp
	Tourism Venture Start-up Toolkits	Entrepreneurs, developers, investors	Adopt-a-Business, Chambers of Commerce, SBDC, Municipalities, Econ Development	6 - 12 months	<\$5K
Branding & Marketing	Regional brand anchored to Letchworth	Multi-stakeholders	Destination Brand Consultants	6 - 12 months	\$15-20K
	Targeted Marketing and Advertising to Strategic Segments	TPAs, Businesses, Municipalities, Attractions	Destination Brand Consultants, community and business groups	6 - 12 months	\$10-15K
	Digital Destination Marketing Platform	TPAs, Businesses, Municipalities, Attractions	Destination Brand Consultants, community and business groups	12 months	\$20-30K
	LGV Digital Experiences	Entrepreneurs, historians, artists, outdoor enthusiasts	Destination Brand Consultants, community and business groups	12 months	\$50-100K

Appendix A

Table 15: Summary of Recommended Strategies
(LGV facilitated)

Category	Recommended Strategy/Action	Target Group	Implementing Partners	Timeframe	Cost
Destination Capacity Building	Digital Marketing Technical Assistance	Businesses	Adopt-a-Business; Chambers of Commerce; Downtown Merchant Groups, Economic Development	12+months	<\$10K
	Familiarization Training	Businesses, SUNY Geneseo & Attractions	TPAs, Promote Geneseo!, Merchant Associations	<6 months	<\$2K
Workforce & Entrepreneurial Capacity	Hospitality Workforce Development (Professional Exchanges)	Hospitality workers	LGV, SUNY Geneseo International Programs, Red Hook, County Workforce Development	2 – 5 years	>\$250,000
	Rural Social Innovation Hub	Entrepreneurs, students, researchers, community + govt leaders	BOCES, SUNY Geneseo, GCC, impact investors, government, non-profit, Cornell Cooperative	2 – 5 years	\$2-5M

Table 16: Visitor Segment Desired Improvements Comparison Tables

Factors identified as "needing improvement" by 33% or more of respondents in selected visitor segments

Needs Improvement by Segment (response percentages over 33% to identify areas of agreement)												
	\$100,000+ household income		Overnight visitors		Generation X & Millennials		Baby Boomers & older		Monroe & Erie Counties			
	%	#	%	#	%	#	%	#	%	#	%	#
Directional signage												
Online visitor info/central website	46%	41										
Restaurants featuring local food	57%	51	39%	77	42%	86	41%	77	41%			37
Local wineries & breweries					35%	72	32%	60				
Specialty retail/souvenir shops												
Stores open weekends/evenings	60%	53	41%	80	51%	105	32%	60	51%			46
Maps of hiking/walking trails	46%	41			40%	82			41%			37
Bicycle friendliness	49%	44							38%			35
Local transportation options					33%	67						
Accommodation options	45%	40							35%			32
Parking												
Guided tours												
Cultural events	52%	46			33%	68						32%
Live entertainment	46%	41			34%	69						
Spa/wellness services												

Table 17: Visitor Segment Desired Improvements Comparison Tables

Factors identified as "not needing improvement" by 33% or more of respondents in selected visitor segments

No Improvement Needed by Segment (response percentages over 33% to identify areas of agreement)												
	\$100,000+ household income		Overnight visitors		Generation X & Millennials		Baby Boomers & older		Monroe & Erie Counties			
	%	#	%	#	%	#	%	#	%	#	%	#
Directional signage	47%	42	58%	113	55%	112	53%	101	48%	44		
Online visitor info/central website	34%	30	54%	106	47%	96	55%	105	47%	43		
Restaurants featuring local food			45%	89	44%	89	41%	77	41%	37		
Local wineries & brewer- ies	35%	39	45%	89	36%	73	41%	78	40%	36		
Specialty retail/souvenir shops	45%	40	46%	90	43%	88	41%	77	38%	35		
Stores open weekends/ evenings												
Maps of hiking/walking trails	40%	36	52%	101	48%	98	52%	99	45%	41		
Bicycle friendliness			34%	66	41%	84						
Local transportation op- tions												
Accommodation options												
Parking	63%	56	69%	135	69%	140	68%	135	66%	60		
Guided tours	47%	42	39%	76	38%	78	33%	62	34%	31		
Cultural events			44%	86	41%	83	41%	78				
Live entertainment												
Spa/wellness services												

Table 18: Visitor Segment Desired Improvements Comparison Tables

Factors identified as "not important to me" by 33% or more of respondents in selected visitor segments

“Not Important to Me” by Segment (response percentages over 33% to identify areas of agreement)											
	\$100,000+ household income		Overnight visitors		Generation X & Millennials		Baby Boomers & older		Monroe & Erie Counties		
	%	#	%	#	%	#	%	#	%	#	
Directional signage											
Online visitor info/central website											
Restaurants featuring local food											
Local wineries & breweries							35%	66			
Specialty retail/souvenir shops											
Stores open weekends/evenings											
Maps of hiking/walking trails											
Bicycle friendliness			34%	66			36%	68			
Local transportation options	43%	38	54%	106	45%	92	59%	113	47%	43	
Accommodation options					35%	71					
Parking	34%	30	40%	79	42%	85	38%	72			
Guided tours									34%	31	
Cultural events											
Live entertainment	33%	29	36%	71	33%	68	38%	72	37%	34	
Spa/wellness services	42%	37	58%	113	55%	112	58%	111	53%	48	

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Appendix D

Survey Questionnaire

Visitor Survey

Hello and welcome to Letchworth State Park and the surrounding area!

As gateway communities to Letchworth State Park, we 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. The survey should only take 5-8 minutes to complete. All responses will remain confidential.

Upon completion of the survey you will automatically be entered to win a gift basket filled with items local to the Letchworth region - a value of \$100. Thank you for your time and help!

1. Today's Date:

Please enter today's date / /

2. Where did you pick up this survey?

- ☐ Perry
- ☐ Mount Morris
- ☐ Geneseo
- ☐ Letchworth State Park
- ☐ Facebook or other Social Media Platform

Please specify

3. On this trip, are you spending time at one or more of the following? (check all that apply)

- ☐ Letchworth State Park
- ☐ Perry
- ☐ Geneseo
- ☐ Mount Morris
- ☐ New York's Finger Lakes Region
- ☐ Other (please specify)

Appendix D

Survey Questionnaire

4. How did you hear about Letchworth State Park and/or the surrounding area? (Check all that apply)

- ☐ Magazine
- ☐ Newspaper
- ☐ Brochure / Travel Guide
- ☐ Radio
- ☐ TV
- ☐ Word of mouth
- ☐ Visited before

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

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

- ☐ Visit Letchworth State Park
- ☐ Visit friends and/or family
- ☐ Business
- ☐ Vacation
- ☐ Recreation
- ☐ Passing through
- ☐ An Event or Other (please list)

6. Is this trip a...

- ☐ A day trip
- ☐ An overnight stay

If staying overnight, how many nights?

Appendix D

Survey Questionnaire

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

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

8. Is this your first trip to Letchworth State Park?

- ☐ Yes
- ☐ No

9. 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
- ☐ Once every 10+ years

10. Where are you from?

Zip Code (U.S. residents)

Country of Residence (non-U.S. residents)

Appendix D

Survey Questionnaire

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

Lodging or Camping	<input style="width: 70%;" type="text"/>
Restaurants or Groceries	<input style="width: 70%;" type="text"/>
Transportation (including gas)	<input style="width: 70%;" type="text"/>
Shopping / Souvenirs	<input style="width: 70%;" type="text"/>
Recreation / Entrance Fees / Tours / Permit Fees	<input style="width: 70%;" type="text"/>
Other (please define)	<input style="width: 70%;" type="text"/>

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

13. 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 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"/>
Historical / cultural attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity to larger cities (eg. 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)	<input style="width: 100%; height: 20px;" type="text"/>			

Appendix D

Survey Questionnaire

14. 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 walking 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"/>
Local transportation options - cabs, rideshare (i.e. Uber), shuttles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accommodation options (i.e. 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)

Appendix D

Survey Questionnaire

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

- ☐ 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)

16. What is your gender?

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

17. In what year were you born?

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

of Adults:

of Children (under 18):

Appendix D

Survey Questionnaire

19. Who is traveling with you on this trip?

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

20. What is your annual household income?

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

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

22. Thank you for taking the time to complete this survey. By filling out this survey you are automatically entered into a drawing to receive a gift basket of local Finger Lakes products worth \$100. Please enter your email address and where you would like the gift basket sent should you win!

Appendix E

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