

CONTENTS

വ	OVERVIEW	T
ノター	OVERVIEW	

- 13 | SURVEY DESIGN & ANALYSIS
- 16 KEY FINDINGS
 - o Visitor market
 - o Why are visitors coming here?
 - o Top 5 things people love about the region
 - o Visitors' economic impact
 - o How can we enhance the visitor experience?
 - o What is the best way to communicate with visitors?
- 30 MARKET SEGMENT ANALYSIS
- 58 | APPENDICES
 - o Visitor Segment Preferences and Desired Improvements Comparison Tables
 - o List of Tables
 - o Survey Questionnaire
 - o Works Cited/Resources

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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 nonlocal 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 decisionmaking 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, tripplanning 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% ofsample)
- Day visitors (n=196; 52% of sample)
- Summer visitors (n=169: 44% ofsample)
- 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

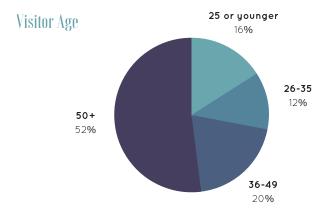
Visits multiple times per year

KEY FINDINGS

VISITOR MARKET

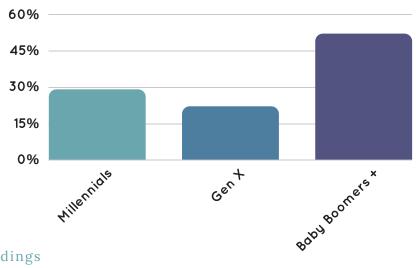
Who are our visitors?

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%).



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



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%).

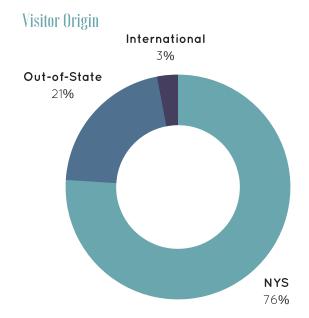
The majority of respondents were families traveling with a partner or spouse (77%). Of the visitors traveling with family, only about a quarter were families with children under the age of 18 (27%).

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%).

63% had visited the park before

visit the park multiple times a year

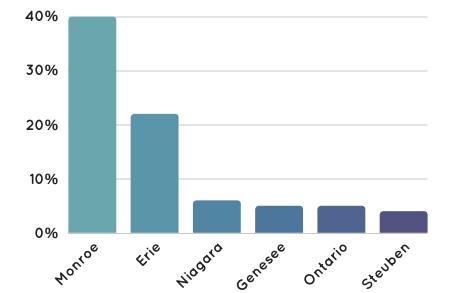


WHERE ARE VISITORS COMING FROM?

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-ofstate 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**

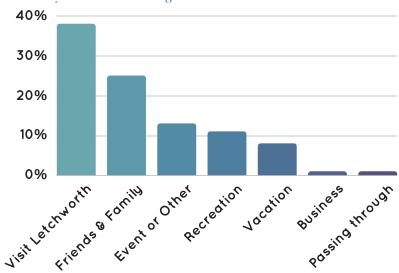


Top 6 Counties of Origin for Visitors from Western New York

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."

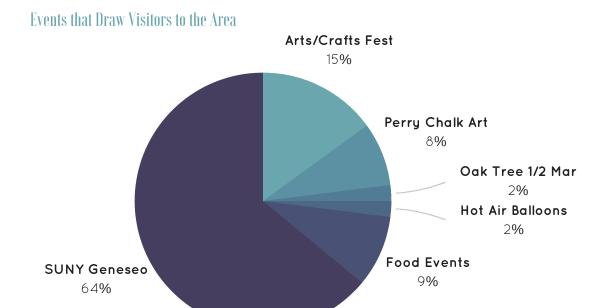
Letchworth State Park is the primary draw overall and is more important for day visitors (46%) and for those who have never visited the area or who visit the area less frequently (46%) compared to the sample as a whole (38%).

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.



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.

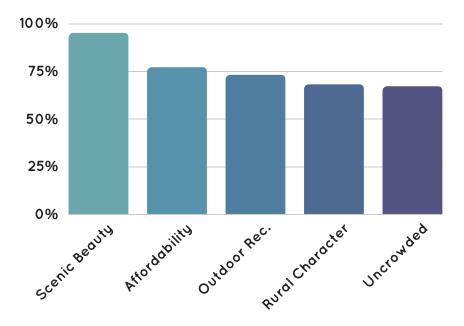
Nine percent of event goers cited events at the Hole in the Wall (HITW) Restaurant (Perry), the Charcoal Corral (Perry) and Glen Iris (Letchworth State Park) as their primary reason for visiting the area. This suggests that food experiences and events can be draws for attracting people to the region.

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

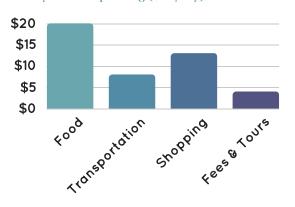
Overnight visitors stay significantly longer in the summer (5.4 nights) than in the fall (2.5 nights). Average length of stay for all overnight visitors is 3.3 nights.

Average visitor spending

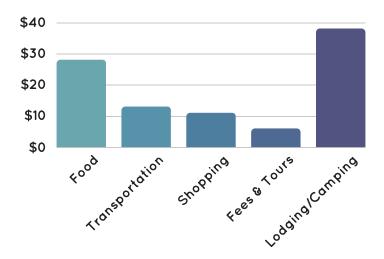
Visitors taking the online survey or participating in the intercept survey were asked to provide estimates of their daily spending across five key categories. The results were averaged across a sample of 276 visitors who responded to this part of the survey. Expenses on average covered a group or family 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.

Day Visitor Spending (\$45/day)



Overnight Visitor Spending (\$96/day)



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

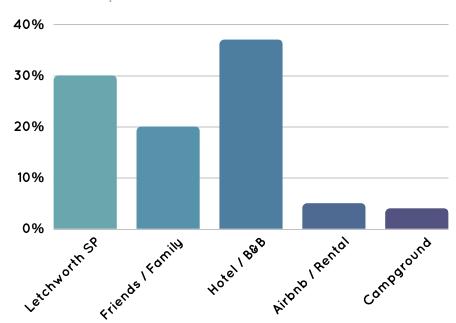
Differences among market segments

- 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



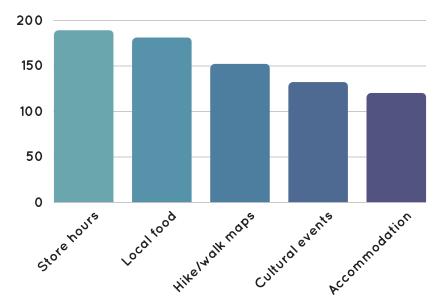
HOW CAN WE ENHANCE THE VISITOR EXPERIENCE?

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
- Parkina
- Bicycle-friendly facilities, trails and roadways
- Restaurants featuring local cuisine and farm-to-table produce

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%
Open Sundays	100000000	0.00000	10000000
After 5 pm (more than one day/ week)	42%	40%	61%
Late night (after 10 pm)	3%	4%	23%

"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."

⁽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		2	0
Café/bakery	2	3	5
Fine dining	2	1	1
Casual dining (bar & grill)	4	3	5
Ethnic/ international		I	3
Healthy/ vegetarian/ gluten-free	0	I	4

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.

"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."

⁽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	J	2	5
Campground	l (Silver Lake)	I	0 (village) I (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+ house- hold 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 tripplanning 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+ house- hold 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.

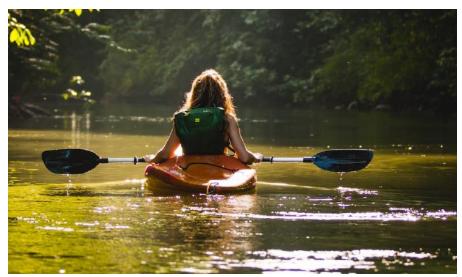


Photo: Filip Mroz

Appendix B Table 16: Visitor Segment Desired Improvements Comparison Tables

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

<u> </u>		Needs	Improv	Needs Improvement by Segment	by Segn	nent				
(respo	(response percentages over 33% to identify areas of agreement)	centages	s over 3	3% to ic	lentify a	reas of	agreem	ent)		
	\$100,000+	+000	Over	Overnight	Genera	Generation X	Boomer	Boomers &	Monroe &	8 00
	income	me	visiv	visitors	Mille	Millennials	older	er s	Erie Counties	unties
	%	#	%	#	%	#	%	#	%	#
Directional signage										
Online visitor info/central website	46%	14								
Restaurants featuring local food	27%	51	39%	77	42%	98	41%	77	41%	37
Local wineries & breweries					35%	72	32%	09		
Specialty retail/souvenir shops										
Stores open weekends/ evenings	%09	53	41%	80	%15	105	32%	09	%15	46
Maps of hiking/walking trails	46%	41			40%	82			41%	37
Bicycle friendliness	46%	44							38%	35
Local transportation op- tions					33%	29				
Accommodation options	45%	40							35%	32
Parking										
Guided tours										
Cultural events	25%	46			33%	89			35%	32%
Live entertainment	46%	41			34%	69				
Spa/wellness services										

Table 17: Visitor Segment Desired Improvements Comparison Tables Appendix B

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

(respo	No Improvement Needed by Segment (response percentages over 33% to identify areas of agreement)	No Improvement Needed by Segment rcentages over 33% to identify areas or	over 3	t Neede	ed by Se lentify a	gment reas of	agreem	ient)		
	\$100,000+ household income	000+ hold me	Over	Overnight visitors	Genera 8 Mille	Generation X & Millennials	Ba Boorr olc	Baby Boomers & older	Monroe & Erie Counties	oe & unties
	%	#	%	#	%	#	%	#	%	#
Directional signage	47%	42	28%	113	25%	112	53%	101	48%	44
Online visitor info/central website	34%	30	54%	901	47%	96	25%	105	47%	43
Restaurants featuring local food			45%	68	44%	68	%I+	77	41%	37
Local wineries & brewer-ies	35%	39	45%	68	%98	73	41%	78	40%	36
Specialty retail/souvenir shops	45%	40	46%	06	43%	88	41%	77	38%	35
Stores open weekends/ evenings										
Maps of hiking/walking trails	40%	36	52%	101	48%	86	52%	66	45%	14
Bicycle friendliness			34%	99	41%	84				
Local transportation op- tions										
Accommodation options			8 70							
Parking	63%	56	%69	135	%69	140	%89	135	%99	09
Guided tours	47%	42	36%	76	38%	78	33%	62	34%	31
Cultural events			44%	98	41%	83	41%	78		
Live entertainment										
Spa/wellness services			31							S 51

Appendix B 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

(respo	"Not Important to Me" by Segment (response percentages over 33% to identify areas of agreement)	"Not In	s over 3	t to Me	"Not Important to Me" by Segment	gment reas of	agreem	lent)		
	*100 000 \$	TOUO			Nonog	Conountion X	200	hv		
	household	plode	Over	Overnight		& &	Boom	Boomers &	Monroe &	oe &
	income	me	visi	visitors	Mille	Millennials	olo	older	Erie Counties	unties
	%	#	%	#	%	#	%	#	%	#
Directional signage										
Online visitor info/central										
website										
Restaurants featuring local food										
Local wineries & brewer-							35%	99		
ies										
Specialty retail/souvenir										
										2.0
Stores open weekends/										
evenings										
Maps of hiking/walking trails										
Bicycle friendliness			34%	99			36%	89		
Local transportation op-	43%	38	54%	901	45%	92	26%	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%	89	38%	72	37%	34
Spa/wellness services	42%	37	28%	113	25%	112	28%	===	53%	48

Appendix C List of Tables

Table 1:Tourism-related Store Hours (e.g. restaurants, cafes, specialty retail)	25
Table 2: Diversity of Restaurant Options	26
Table 3:Accommodation Options	28
Table 4:Visit Characteristics by Market Segment	31
Table 5: Reasons for Visiting by Market Segment	32
Table 6: Lodging by Market Segment	32
Table 7: Importance of Word of Mouth and Previous Visits by Market Segment	33
Table 8:Travel and Trip-planning Information Sources by Market Segment	34
Table 9: Summary of Needed Improvements by Market Segment	36
Table 10: Online Presence of Tourism Businesses	38
Table II: MeetUp	42
Table 12:Yelp (Most Reviewed Listings)	42
Table 13:TripAdvisor (Top Things to Do)	42
Table 14: Summary of Recommended Strategies (LGV funded/directed)	58
Table 15: Summary of Recommended Strategies (LGV facilitated)	59
Table 16-18: Visitor Segment Desired Improvements Comparison	60

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.

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 MM DD YYYY I J
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)

4. F	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
\Box	Visited before
lf "C	Online" or "Other", please list websites or other channel
5. V	What is the primary purpose for visiting this area? (Mark only one answer)
0	Visit Letchworth State Park
\bigcirc	Visit friends and/or family
\bigcirc	Business
\bigcirc	Vacation
	Recreation
	Passing through
	An Event or Other (please list)
	, and a state of the state of t
6 1	s this trip a
о. I.	
ᆜ	
Ш	An overnight stay
	audian augminht hausmann nighta
If sta	aying overnight, how many nights?

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)	

1. 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					
Restaurants or Groceries					
Transportation (including gas)					
Shopping / Souvenirs					
Recreation / Entrance Fees / Tours / Permit Fees					
Other (please define)					
10 When do : 2 - 2 - 2	ii alii				
13. When deciding to vis	sit this area, how in	mportant were the follo	wing? Moderately Important	Very Important	
13. When deciding to vis Scenic Beauty				Very Important	
				Very Important	
Scenic Beauty				Very Important	
Scenic Beauty Outdoor Recreation Rural/ Small town				Very Important	
Scenic Beauty Outdoor Recreation Rural/ Small town character Historic main streets and				Very Important	
Scenic Beauty Outdoor Recreation Rural/ Small town character Historic main streets and attractions				Very Important	
Scenic Beauty Outdoor Recreation Rural/ Small town character Historic main streets and attractions Affordability Historical / cultural				Very Important	
Scenic Beauty Outdoor Recreation Rural/ Small town character Historic main streets and attractions Affordability Historical / cultural attractions Proximity to larger cities				Very Important	

	Needs Improvement	No Improvement Needed	Not important to m
Directional signage	0	0	0
Online visitor information / central website	\bigcirc	\circ	\bigcirc
Restaurants featuring local cuisine and farm-to-table produce	0	0	0
Local wineries and craft breweries	\bigcirc	\circ	\circ
Specialty retail / souvenir shops	0	0	0
Stores open weekends, evenings (after 6pm) and late night (after 10pm)	\circ	0	0
Maps of hiking and walking trails	0	0	0
Bicycle-friendly facilities, trails and roadways	\bigcirc	\circ	0
Local transportation options - cabs, rideshare (i.e. Uber), shuttles	0	0	0
Accommodation options (i.e. hotel, B&B, Airbnb, "Glamping")	0	0	0
Parking	0	0	0
Guided Tours	0	0	0
Cultural events (e.g. festivals, beer/wine tastings, food tours)	0	0	0
Live entertainment	0	0	0
Spa / Wellness Services	0	0	0
Other (please specify)			

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?
\bigcirc	Male
0	Female
0	Prefer not to say
0	Prefer to self-identify
17.	In what year were you born?
	How many people are you traveling with including yourself?
# of	Adults:
# of	Children (under 18):

19.	Who is traveling with you on this trip?
0	Friends
0	Family
0	Friends and Family
0	Tour Group
0	Alone
0	Other (please specify)
20.	What is your annual household income?
0	\$0-\$30,000
0	\$30,000-\$49,000
0	\$49,000-\$99,000
0	\$100,000+
0	Prefer not to say
21.	Is there anything else you would like to tell us?
	Thank you for taking the time to complete this survey. By filling out this survey you are automatically tered into a drawing to receive a gift basket of local Finger Lakes products worth \$100. Please enter
	ur email address and where you would like the gift basket sent should you win!

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