



Comprehensive Regional Travel and Tourism Study and Recommendations

PRODUCED FOR: FINGER LAKES TOURISM ALLIANCE



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Executive Summary – Highlights

- The Finger Lakes Region was visited by 5.56 million persons in 2018. Leisure accounted for the majority of visitors, registering 4.86 million. An estimated 700,000 persons traveled to the region for only business activities.
- The 4.86 million leisure visitors stayed in the region 3.4 days on average and 2.4 nights on average. 81% were overnight visitors and 19% were day visitors – which registered 11.67 million person nights (this excludes nights spent by business visitors).
- The 4.86 million leisure visitors spent \$2.432 billion in the region. Spending with business visitors included is estimated at \$3 billion.
- Industry spent/placed most of their advertising or promotional efforts on social media (85%), followed by rack card brochures (72%), online ads (52%), magazines 46%, and vacation planners (44%).
- 70% of the visitors used www.fingerlakes.org when asked about their information source for the FLTA information packet. The FLTA travel guide was second.
- Impact of FLTA Marketing on Visitors: Travel information had a significant impact on a visitor's Decision to Visit a Specific Attraction or Other Activity. 81% rated FLTA information as having an impact (50% a great deal of an impact). Nearly 2 in 3 (66%) were also impacted on their decision to spend more time in the region.
- Industry was asked what percentage of growth in your organization would you attribute to the marketing done by FLTA? 75% responded that at least some could be attributed to FLTA, with the average as 17% of their growth.
- Trade satisfaction with FLTA programs included reputation in the industry, travel guide, and marketing knowledge/ability.
- Trade satisfaction with FLTA partnership benefits – the highest satisfaction was with staff being responsive to needs and organizational leadership.

Executive Summary – Visitor Profile

- Visits - The Finger Lakes Region was visited by 5.56 million persons in 2018. Leisure accounted for the majority of visitors, registering 4.86 million. An estimated 700,000 persons traveled to the region for only business activities.
- Nights – 4.86 million leisure visitors stayed in the region 3.4 days on average and 2.4 nights on average. 81% were overnight visitors and 19% were day visitors – which registered 11.67 million person nights (this excludes nights spent by business visitors – which was outside the scope of work).
- Party Size – the average party size was 2.5 persons (unchanged from 2006).
- Spending – the 4.86 million leisure visitors spent \$2.432 billion in the region. Spending with business visitors is estimated at \$5.3 million for a total estimated impact of \$3 billion.
- Leisure visitors spent an estimated \$148 per person per day and \$505 per person per trip. The average leisure visitor party spend \$1,434 per stay and \$430 per day.
- Overnight visitors spent more – spending \$161 per day compared to only \$82 per day for day trip visitors. Total spend for overnight visitors per party was \$1,650 vs. only \$272 per party by day visitors.
- Leisure visitors from outside the region spent an average of \$163 per visitor per day and \$1,651 per travel party per trip. By comparison, residents of the Finger Lakes spent far less per trip per party (only \$705).
- Meals accounted for 27% of the visitor spending, followed by lodging (25%), shopping at wineries (16%), shopping other than wineries (13%), transportation (10%), and attractions (8%).
- Non-residents who shopped at wineries spent twice as much as residents (\$167 vs. \$85). Overnight visitors spent nearly twice as much per day on food/meals vs. day-trippers (\$130 vs. \$76).
- The majority of visitors were leisure visitors (76%). Visiting friends and family ranked second (14%), followed by conference/convention/other business (6%), and other at 4%.
- The top category for visiting was a weekend getaway of 1-3 nights (35%). Weekday getaways (1-3 nights) ranked second (16%). Day visits accounted for 15% (ranking third). Vacation (4+ nights) ranked fourth (13%), and visiting friends/relatives (8%) rounded out the top five.
- General relaxation was the top visitor purpose, followed by visit a winery, attend a festival/event, a romantic getaway, and shopping.
- The average age for visitors was 59 years old with approximately half between 45 – 64 years old. Older visitors (65+) out numbered younger ones (under 45) by 3 to 1. Under 45 accounted for only 13% of the visitors.
- The majority of visitors (89%) had attended college, with 46% indicating they had a college degree and 27% attended graduate school.
- Half of the visitors worked full time and 37% were retired, 10% worked part time and 3% were unemployed.
- The average household income was \$93,500.
- 84% of the visitors traveled without children, with 16% traveling with children (of those the average number of children was 2.5). The typical party size was 2.8 total persons with the average number of adults at 2.5. Residents of the Finger Lakes were more likely to travel with children.
- 40% of visitors resided in New York State, with 20% from the Finger Lakes region. Other New York (outside the region) accounted for 22%. Pennsylvania was the top state market outside of New York. Canada ranked after Pennsylvania, then New Jersey, Ohio, and Florida.

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Executive Summary – Visitor Profile

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- Most visitors drove to the Finger Lakes (90%), just under 1 in 10 entered the region by air and other was 1%.
- Accommodations – the majority (57%) of visitors stayed in a hotel/motel, 10% stayed with friends and family, 6% indicated RV/camping/cabin, 5% B&B/Inn, 4% Airbnb/condo/timeshare/rental, and 1% resort/spa. Compared to previous studies, hotel/motel and friends/family use increased, while B&B decreased.
- Activities – visiting state park(s) was number one (48%). Winery ranked second and historic sites/museums rounded out the top three. Camp/hike/bike ranked fourth, followed by brewery/distillery/cidery, festival/sport event, farm/farmers market, and water activities.
- Visitors were asked to check activities that they would have participated in if they were aware of it and it was available while they were in the Finger Lakes region. The top three activities were: more fine dining restaurants (35%), more craft beverage festivals (31%), and overnight canal/lake barge cruises (31%).
- In terms of lodging options, when asked what visitors would like to see more of in the Finger Lakes, mid-priced hotels were the most requested (38%). This was followed by modern full-service hotel with restaurant (25%), cabins (24%), bed and breakfast (19%), budget lodging (16%), Airbnb/condo (14%), upscale/luxury hotel 12%. Each of the following three lodging options registered at 10%: resort/spa, hotels with family suites, and RV park/camping. Nearly one in five responded with none (18%).
- In the area of potential new retail or areas where visitors would have been interested in shopping in the Finger Lakes, the top interest is Made in New York items (40%), followed by clothing (34%) and books/music (33%).
- On average, travelers visited 2.2 Finger Lakes counties on their trip. Nearly half visited only one county (44%), while 23% visited two counties and 17% visited three.
- The top counties visited are evenly distributed across 4 counties: Seneca (11%), Cayuga (10%), Schuyler (10%), and Ontario (9%).
- 53% visited in the summer (May – August). 40% visited in the fall (September/October – the main months of the survey). 7% of trips were between November 2017 and April 2018.
- The majority of visitors plan to return to the Finger Lakes (53%). 41% indicated they did not know and 6% said they did not plan to return. When asked what months they planned to visit (for those indicating they plan to visit), 57% indicated winter (Nov-Apr), 34% indicated summer (May-Aug), 24% indicated fall (Sep-Oct), and 24% had not decided yet. It should be noted that this was in part influenced by the fact that 73% of day-trippers were planning to return (vs. 49% for overnight visitors).
- Visitor Satisfaction was strong! 67% of visitors rated the Finger Lakes as Excellent! Nearly all (97%) rated it positive and no one indicated their visit was a poor visit.
- Visitors were most satisfied with the attractions in the region, followed by craft beverages, visitor information, and service. Shopping was rated a bit lower for satisfaction (which is tied to visitors wanting to purchase more local “New York Made” products).
- Visitors were asked, “What do you remember liking the most about your last trip to/in the Finger Lakes Region?” The big hits included: wineries/wine, lakes, museums, family/friends, relaxing/peaceful/atmosphere, and scenery.
- Visitors were asked, “What do you remember disliking the most about your last trip to/in the Finger Lakes Region?” The number one answer: “Nothing.” Others included the rain, roads, and traffic.
- Trip Planning – the majority of visitors planned their trip within one month of the trip. 24% planned it just two weeks in advance, while 25% planned it one month out. Only 22% used more than 4 months to plan their trip.

Executive Summary – FLTA Effectiveness and Travel Industry Survey

- Nearly one third of the visitors used the www.fingerlakes.org web site for planning or making a reservation. Overnight visitors were significantly more likely to recall using the site.
- Visitor center use (general, not only Finger Lakes Travel Alliance) – visitors were asked “how often do you stop at a visitor center to get information on things to see and do in an area or information on places to stay?” Nearly half of the visitors will stop at a visitor center to get information on things to see and do in an area or information on places to stay (12% frequently, 37% fairly often). Overnight visitors and non-residents are more likely to use visitor centers (54% for overnight and 55% for non-residents).
- Visitors were asked “when at a visitor center, what is your most preferred method to receive information?” Once at a visitor center, the most preferred method to receive information was a printed travel guide (44%), followed by a printed map (31%), and about one in five preferred speaking with a travel expert. However, after their first choice, speaking with a travel expert is most often their second choice (31%).
- The industry perception by purpose of trip is much higher for group travel (16% industry survey vs. 1% for visitor survey) and VFR (8% industry survey vs. 14% for visitor survey).
- Top markets for industry included: families (43%), adults without children (43%), seniors/retired (11%), and other (1%). The industry was much more likely to perceive children on the trip.
- For industry the top five feeder markets included: Pennsylvania, Rochester, Canada, other NY State, Syracuse, Buffalo, New Jersey, other Finger Lakes, other New England, and other international.
- Industry spent/placed most of their advertising or promotional efforts on social media (85%), followed by rack card brochures (72%), online ads (52%), magazines 46%, and vacation planners (44%). Industry was also asked which was most effective – social media was the top for both efforts and most effective.
- Conversion: 72% of visitors recall receiving the FLTA information sent to them! 20% could not recall and only 8% could not remember.
 - 70% of visitors used www.fingerlakes.org when asked where they had found about requesting FLTA information packet. The FLTA travel guide was second, followed by social media, lloveny.com, and the FLTA mini-guide and map rounded out the top five.
 - Facebook was the leading social media source.
 - Conversion – 62% of the Inquirers traveled to or through the Finger Lakes region since receiving the FLTA information. This is a very high conversion rate, which reflects the level of interest of visitors once they ask for information. Highest among winemakers (75%), followed by general interest (66%).
 - Comparing Inquirers who had visited the Finger Lakes region prior to requesting information shows that 56% had previously taken a trip, 30% had not, and 14% were Finger Lakes region residents. Comparing their conversion shows that 67% of past visitors took a Finger Lakes trip after receiving the information, compared to just 39% for first timers. Compared to 2006, this shows a higher conversion among past visitors (67% vs. 61%).
 - Strongest likes for information received: maps, wine-trail maps, things to see and do, attraction information, events, lists, and activities.
 - Most Inquirers (70%) did not feel there was any other information that would have helped them plan their trip (for items not covered in the information received from FLTA).

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Executive Summary – FLTA Effectiveness and Travel Industry Survey

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- Impact of FLTA Marketing on Visitors – travel information had a significant impact on a visitor’s decision to visit a specific attraction or other activity. 81% rated FLTA information as having an impact (50% a great deal of an impact). Nearly 2 in 3 (66%) were also impacted on their decision to spend more time in the region.
- Industry was asked what percentage of growth in your organization would you attribute to the marketing done by FLTA? 75% responded that at least some could be attributed to FLTA, with the average as 17% of their growth. Nearly half (46%) responded that between 6% and 25% of their growth was due in part to FLTA marketing.
- Trade Satisfaction with FLTA Programs – FTLA delivers on:
 - Reputation in the industry, travel guide, marketing knowledge/ability. Improvements could include: ability to work with others, website functionality, social media, other marketing, and providing educational seminars.
- Trade Satisfaction with FLTA Partnership Benefits – the highest satisfaction was with staff being responsive to needs and organizational leadership.
- Industry was asked “how familiar are you with the follow organizations: Finger Lakes Tourism Alliance (69% familiar), TPAs (52% familiar), Finger Lakes Wine Country (34% familiar), and Finger Lakes Regional Tourism Council (15%).
 - Industry was asked as a follow up to the above question “now think about the marketing of the region. Which one of these organizations do you think is the leader for the tourism industry in the Finger Lakes Region? 43% indicated FLTA, 14% NYS, 13% FLWC, 8% TPAs, 3% FLRTC, other 3%, and none 16%.
 - Which one do you think should be the leader? 50% FLTA, 14% NYS, 6% FLWC, 6% FLRTC, 7% TPAs, 7% other, and none 10%.
- Industry was asked to rate the amount of duplication that exists in the marketing efforts of these organizations? Over one in five (21%) respondents felt there is a great deal of duplication between the organizations. Only 10% felt there was very little. Most (68%) rated it a 3 or 4, indicating some level of duplication exists.
 - Most (48%) felt promotion of the region would be more effective with less duplication. However, 42% felt it was effective as is, and 10% felt it would be more effective with more duplication.
 - For the most part, the industry gave positive marks for how well the organizations work together. 41% rated it strong. Only 28% rate the organizations poorly on working together.
 - Confusion among visitors between the promotional organizations? About one quarter of the industry feels there is confusion on the promotion efforts between FLTA and the other organizations. The majority 52% feel there is some confusion. Most concerning: 26% feel confusion is extreme.
 - TPA awareness? 62% of the industry knew what a County TPA was. 54% knew who represented their business at the County TPA.

Introduction

Travel Market Insights Inc.

- Visits
- Market Share (competitive position)
- Spending Impact
- Visitor Nights (hotel)
- Visitor Characteristics

Travel to the USA and
Throughout the USA



Meet the Team

- ❑ Scott C. Johnson – Travel Market Insights Inc.
- ❑ George Kuhn – Drive Research
- ❑ Donna Larsen – OverView Research



Core Goals

- ❑ Visits
- ❑ Nights
- ❑ Spending
- ❑ Travel Guide Conversion ROI
- ❑ Organizational Evaluation
- ❑ Compare Findings to 2007 Report (2006 study)

The overriding purpose is to understand the visitors to the Finger Lakes region, ensure the tourism industry and the FLTA is best positioned to effectively attract new visitors, engage current visitors, and extend their stay and spending in the region.


This effort focused on leisure visitors to match up with previous studies. All reporting is primarily for leisure visitors. Business visitor volume is provided along with spending, but not profiled.

Study Timeline


		Start/End
Startup Meeting	Immediately after contract is awarded	July 2018
Performance Audit	Will be based primarily on 2017 national and regional data	July – October 2018
Indicator Data	Begin inventory analysis, inform industry of the need for the information, complete in fall	Mid July to Mid October 2018
Industry Survey	Can run over the summer to capture as many industry members as possible	Mid July to Mid October 2018
Intercept Survey	Should start as soon as possible – giving time for questionnaire design and programming	July – End of October 2018
Inquirer Survey	As close to the end of the prime season as possible	July – late October 2018
Data Volumes	All indicator data is needed for this process to be completed	November 2018
Data Analysis	Once indicator data is completed	December 2018
Draft Report	Draft report provided for review. Edits and final as needed with input after presentation	January 2019
Presentation	Present key findings	January 2019
Final Report	1 week after final comments and presentation	January 2019

5 Studies Completed

1. Visitor Intercept Study
 - 601 completes in August and September 2018
2. Follow-up Study
 - 1086 completes in October and November 2018
3. Occupancy Study
 - 100 completes – representing 17% of hotel rooms
 - STR data – representing 83% of hotel rooms
4. Finger Lakes Industry Study
 - 95 completes in November and December 2018
5. Executive Interviews
 - Completed 22



Will be combined into one
Visitor Report



Will be combined into one
Industry Report

Definitions

Visitor – a person who has traveled 50+ miles from home, or is staying overnight in a lodging facility. This would include residents of the Finger Lakes region who are traveling 50+ miles.

Intercept – in-person interviewing.

Follow-up – an email survey sent to those in the Intercept survey as well as those who requested a Finger Lakes Tourism Alliance travel guide.

MOE – Margin of Error – the statistical range of validity in the data.

Methodology – Visitor Studies (2)

1. Intercept Survey. This survey was completed by Drive Research of Syracuse, NY. In total they intercepted 931 persons at 14 locations throughout Finger Lakes. Sites were selected with support the FLTA, and a complete list can be found in the Appendix.

Of the 931 intercepts, 330 (35%) were residents of Finger Lakes, closer than 50 miles from home and terminated.

The remaining 601 completed the survey.

Of those, 305 provided an email for the Follow-up Survey.

Methodology – Visitor Studies (2)

Continued

1. Follow-up Survey. This survey was emailed out to the 305 intercept respondents, plus 52,518 emails provided by FLTA of inquirers for travel information over the past several years. Of these 5,142 were invalid emails.

1085 respondents completed the Follow-up survey.

The survey was conducted online between October 10 and November 7, 2018.

Average survey time was 13.5 minutes.

Data Cleaning and Weighting – Visitor Studies

For this report, the Intercept and the Follow-up are combined and weighted together to create an accurate representation of visitors.

Weights were based on known counts for State Parks and Museums. Balanced with external data on hotel volumes and using TURF analysis to measure duplication, it generated forecast volumes for Wineries, Daytrips and non-hotel visitors.

For Conversion analysis, inquirers were weighted based on Ad Code information (advertising campaign they responded to)

A 2% trim for outliers was completed on Nights and Spending questions. Party Size was limited to max of 10.

The Margin of Error for the combined visitor studies, on the total sample, is +/- 2.6 (which is excellent).

Methodology/Weighting – Industry Study

Industry Survey. This survey was emailed to members of the Finger Lakes tourism industry. Four lists were used to generate this sample: FLTA partners, FLTA prospects, a purchased list from an email vendor, emails pulled directly off the internet for Finger Lake businesses.

This generated 1,515 valid emails and a total of 194 completes (6%).

The survey was conducted online between November 14 and December 7, 2018

Data was weighted back to the list the respondent was contacted from.

Average survey time was 18 minutes.

The Margin of Error for the Industry, on the total sample, is +/-9.8.

Comparison of 2006 and 2018 Visitor Study for Finger Lakes Region

Direct comparisons of the 2018 and 2006 study are not recommended due to the dramatic changes in the field of research over the past twelve years. If data is compared, it should be done so with full understanding of the differences in the two research efforts.

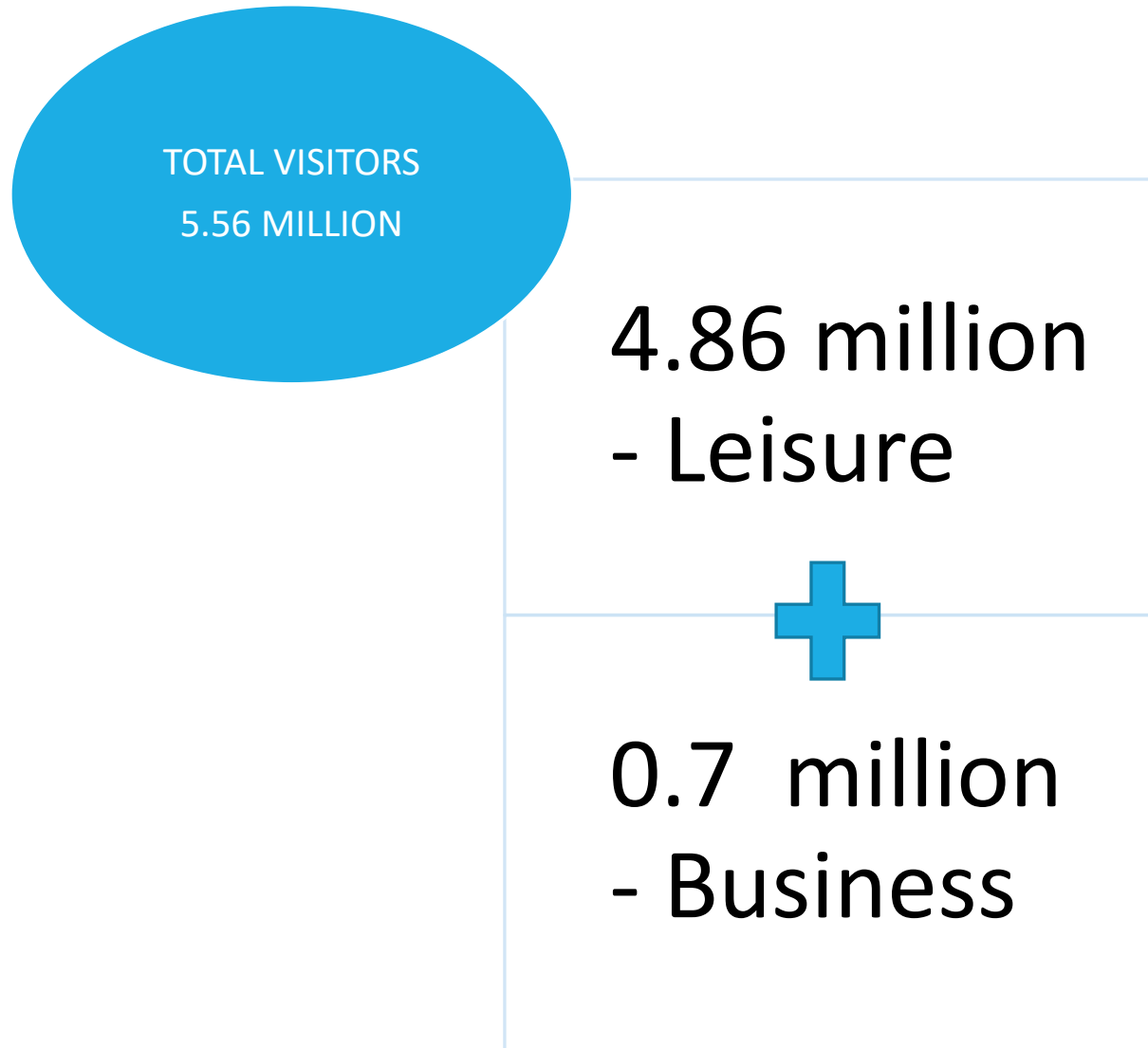
	2018	2006
Sample		
- Industry Survey	n=194	n=146 (lodging only)
- Conversion/Visitors Study	n=1085	n=355
- Intercepts	n=601 completed survey (931 intercepts)	n=201
Conversion and Intercepts merged in Follow-up Survey	n=1686	Not done
Data Weighting for Representativeness	Completed on all studies to represent the sample universe	None known
Volumetric Model	Completed	None
Margin of Error (Follow-up study)	3.0%	6.5%
Outlier Trim on Nights, Party, Spending	2% trim	Unknown

- Sample was substantially higher for the visitor survey / conversion study (1,085 in 2018 vs. 355 in 2006).
- Sample/representation for intercepts in all 14 counties was substantially larger (931 in 2018 vs. 201 in 2006).
- Data weighting for representation was implemented and applied to all studies in 2018 to ensure sample bias was adjusted vs. straight respondent reporting in 2006.
- Volumetric model developed for 2018 to report the volume of visitors to the region vs. no volume model or reporting of volume of visitors for 2006 study.
- Margin of error was half for 2018 (3%) vs. 6.5% in 2006.
- 2018 all outlier trim on nights, party size, spending were developed (2% trim) vs. no known trim for 2006 study.

2018 VISITORS

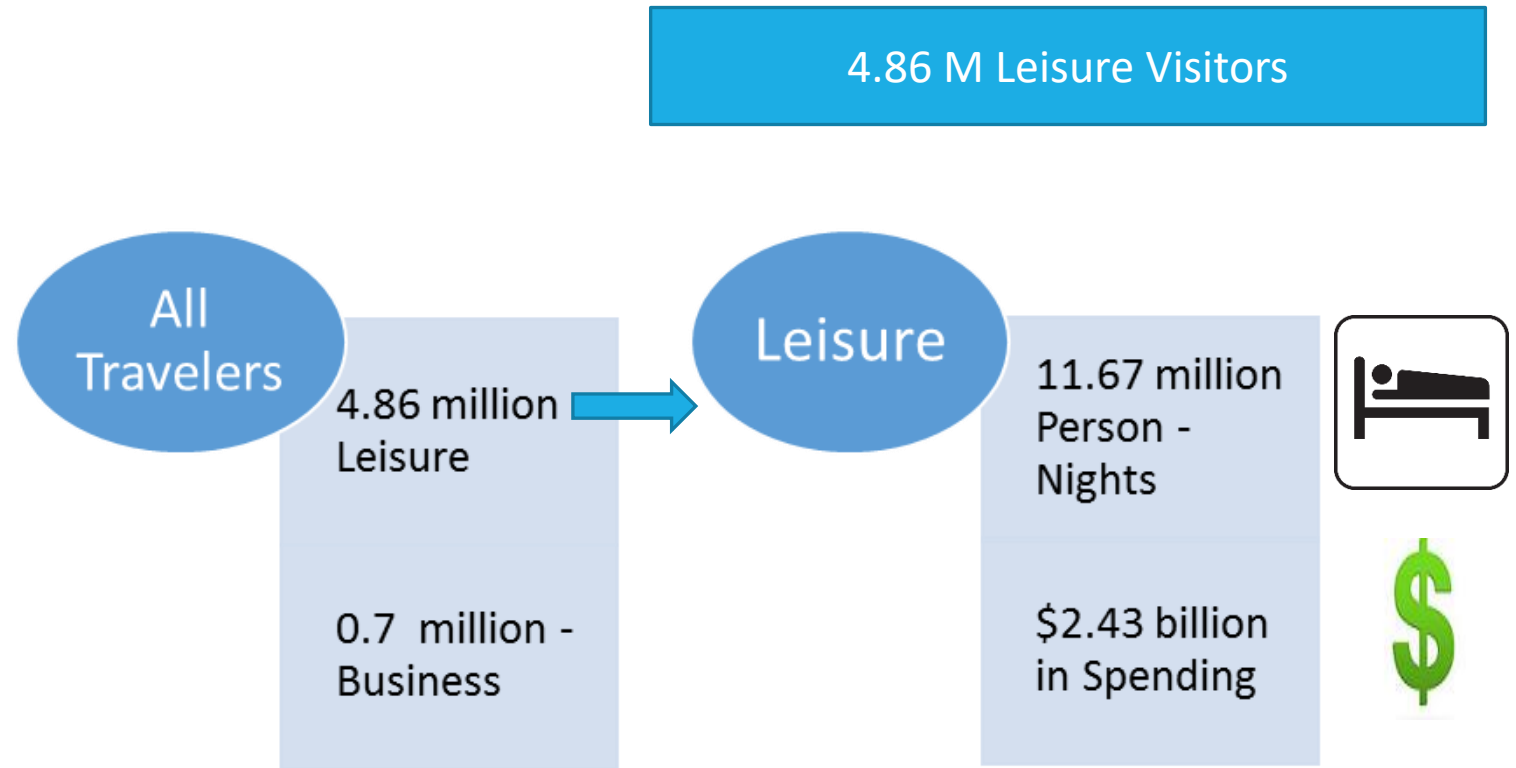
- The Finger Lakes Region was visited by 5.56 million persons in 2018.
- Leisure accounted for the majority of visitors, registering 4.86 million.
- An estimated 700,000 persons traveled to the region for only business activities.*

*Based on surveys and external data sources.



2018 Visitors

- 4.86 million visitors
- Stayed in the region 11.67 million person nights
- Generated \$2.43 billion in direct spending
- Total spending with business visitors is estimated to be \$3 Billion (\$2.96 Billion), with business visitors spending an estimate \$5.3 million.

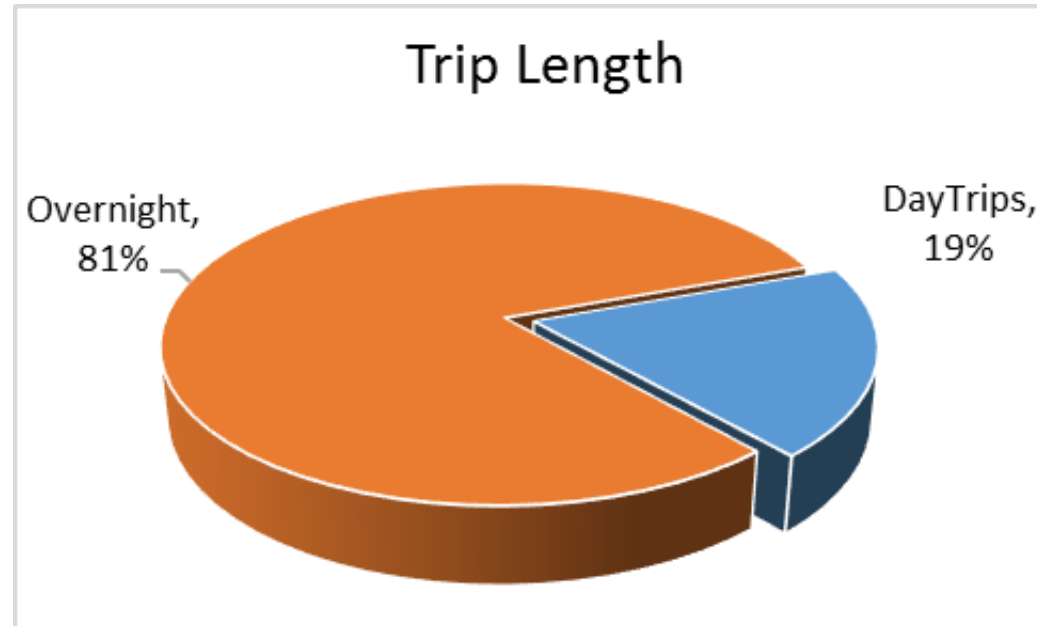


Length of Stay

- Majority (81%) spent at least one night in the region. Up 10% points from 2006* visitors.
- Visitors stayed in the region 2.4 nights on average (3.4 days on average).
- Just under one fifth (19%) were day visitors.
- For visitors staying at least one night the length of stay was 3.0 nights (4 days).

2006* compare: 3.2 nights

*Comparisons to 2006 study should be used with caution (see introduction).

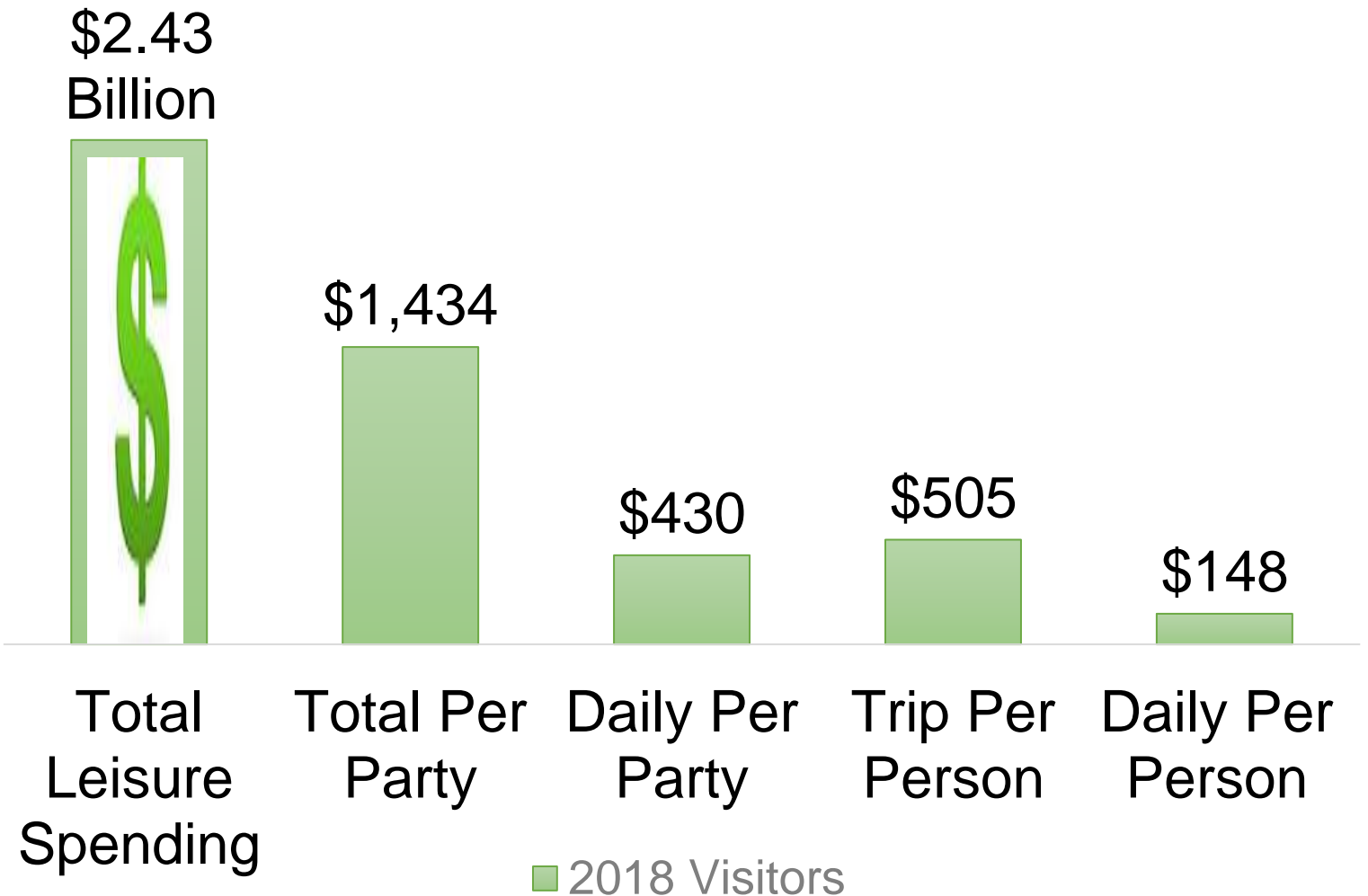


Average Days in Finger Lakes = 3.4
Average Nights in Finger Lakes = 2.4

Spending by Leisure Visitors

- Leisure visitors spent \$2.432 Billion.
- Each day a visitor spent \$148 and \$505 per trip.
- Per party spending each day was \$430 and \$1,434 per trip.

Spending in Finger Lakes



Spending Breakdown by Overnight and Day Visitors

- Overnight Visitors = \$587 per visit and \$161 per day for a total spend of \$2.36 Billion.
- Day visitors = \$82 per person for a total spend of \$725 Million



Based on Follow-up Survey (post trip only)		TOTAL	Trip Length		Residence	
		Visitors	Overnight	Day Trip	Finger Lakes Resident	Outside Finger Lakes
What is your best estimate of the total costs for the total adults and children you counted in your travel party (total time in Finger Lakes)	Mean	\$1,434	\$1,650	\$272	\$705	\$1,651
	Total \$ (000,000)	\$2,432	\$2,360	\$725	\$273	\$2,158
Spending Per Party Per Day	Mean	\$430	\$459	\$272	\$276	\$475
Spending Per Person	Mean	\$505	\$587	\$82	\$254	\$585
Spending Per Person Per Day	Mean	\$148	\$161	\$82	\$102	\$163

Spending Breakdown by Overnight visitors By Residence

- Overnight non-residents visitors spent significantly more than residents of the region.
- Non Residents = \$1,651 per visit for a total of \$2.2 billion at \$163 per day
- Residents = \$705 per visit for a total of \$273 million at \$102 per person per day.



Based on Follow-up Survey (post trip only)		TOTAL	Trip Length		Residence	
		Visitors	Overnight	Day Trip	Finger Lakes Resident	Outside Finger Lakes
What is your best estimate of the total costs for the total adults and children you counted in your travel party (total time in Finger Lakes)	Mean	\$1,434	\$1,650	\$272	\$705	\$1,651
	Total \$ (000,000)	\$2,432	\$2,360	\$725	\$273	\$2,158
Spending Per Party Per Day	Mean	\$430	\$459	\$272	\$276	\$475
Spending Per Person	Mean	\$505	\$587	\$82	\$254	\$585
Spending Per Person Per Day	Mean	\$148	\$161	\$82	\$102	\$163

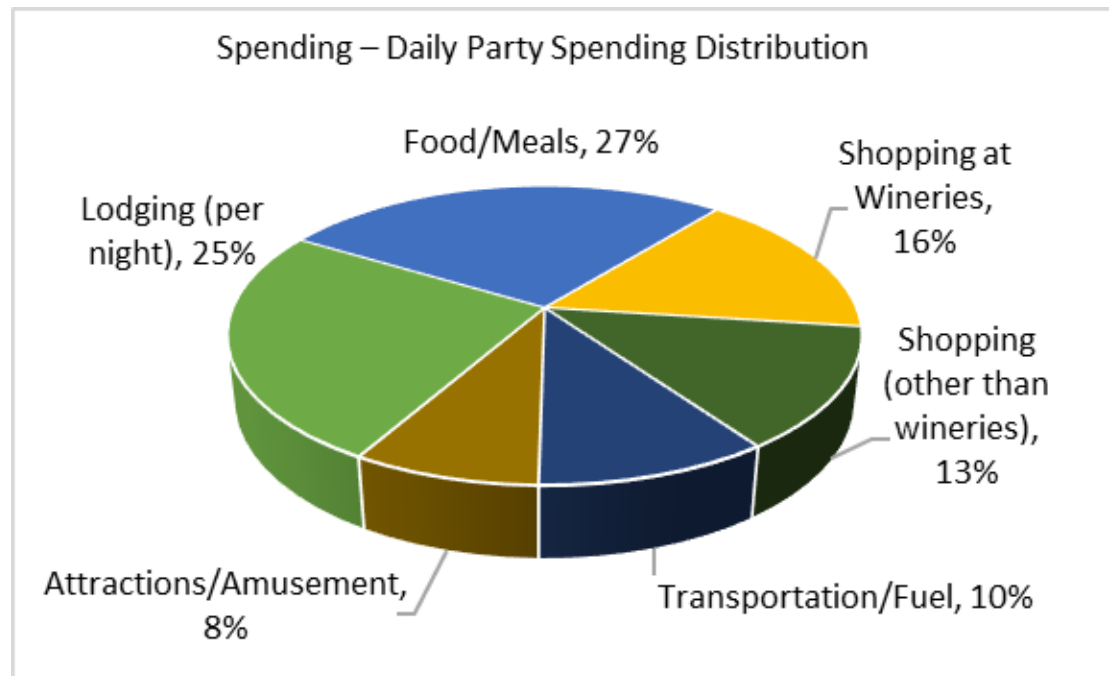
Spending Categories

- Total Daily Party Spending averages \$430.
- This is larger for overnight visitors (\$459) and non-residents (\$475).
- Meals 27%: Overnight visitors spent nearly twice as much per day on Food/Meals vs. day-trippers (\$130 vs. \$76).
- Lodging \$147: The highest daily spend category is Lodging – at \$147 per night and \$193 for those that spent at least one night in a paid accommodation. Lodging accounts for 25% of all spending.
- Residents who stayed in paid lodging paid slightly more than non-residents (\$215 vs. \$190).

Compared to 2006*, daily spending for Lodging and Food/Meals increased. Decreases were seen in all other areas. In terms of their share of spending, the largest shift was between Wineries and Food/Meals. This may be due to more Wineries offering full service restaurants – however 2006* data comparisons should be used with caution (see introduction).

*Comparisons to 2006 study should be used with caution (see introduction).

Category	Average for All Visitors (Per party Per Day)	% Spending > Zero	Average Among Spenders in each Category	Total \$ Spent (estimated based on average spend)	% of All Spending
Lodging (per night)	\$147	76%	\$193	\$608,000,000	25%
Food/Meals	\$112	92%	\$122	\$656,000,000	27%
Shopping at Wineries	\$ 67	44%	\$152	\$393,000,000	16%
Shopping (other than wineries)	\$ 53	47%	\$111	\$311,000,000	13%
Transportation/Fuel	\$ 42	70%	\$ 60	\$246,000,000	10%
Attractions/Amusements	\$ 31	39%	\$ 78	\$182,000,000	8%
TOTAL	\$430	0	\$430	\$2,400,000,000	

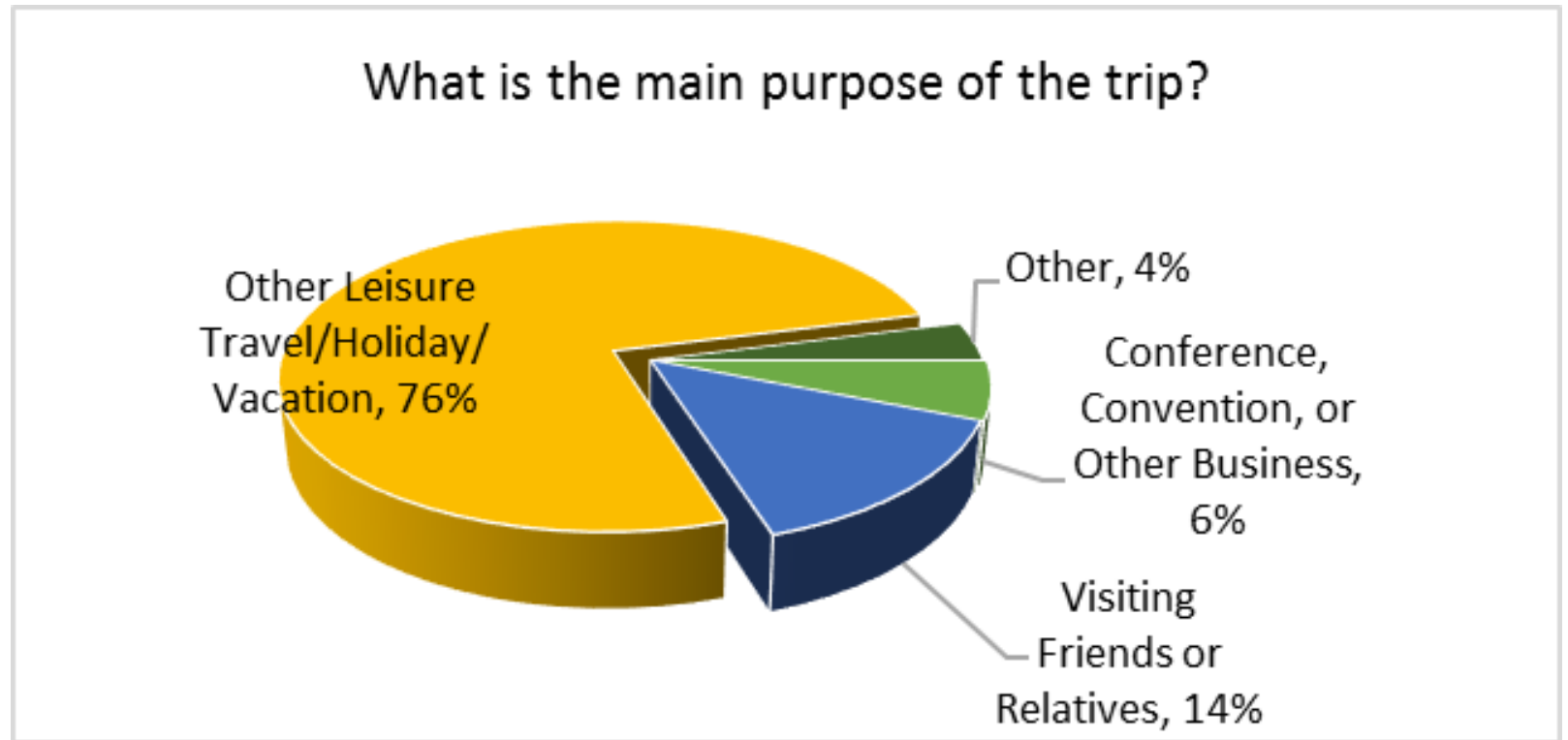


While across all visitors the average spend at Wineries was only \$67/day, this jumps to \$152/day for those who made at least one winery purchase.

Non-residents who shopped at Wineries spent twice as much as residents (\$167 vs. \$85).

Trip Purpose

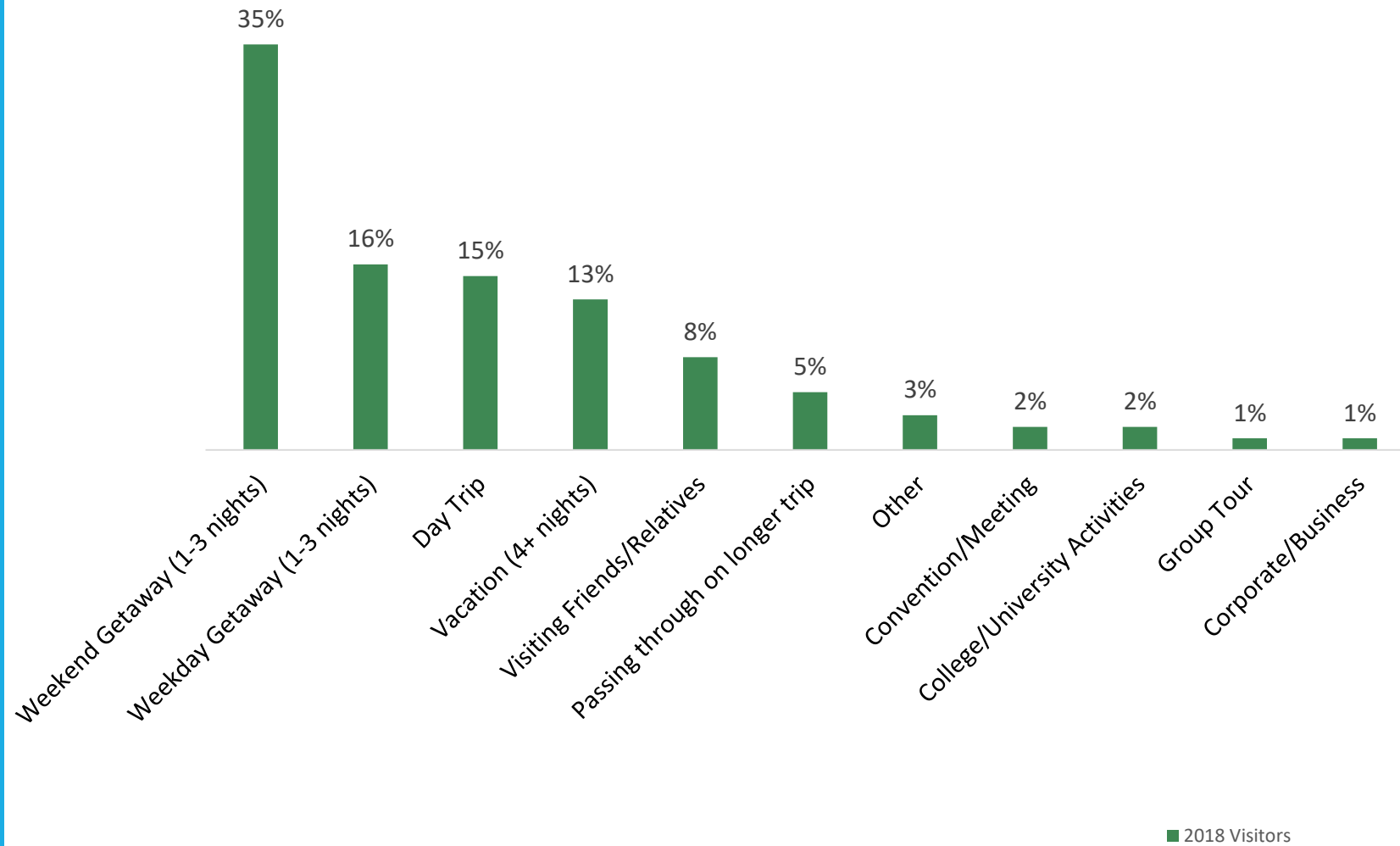
- Majority are Leisure visitors (76%).



Types of Trips

1. 1-3 night weekend getaway
2. 1-3 night weekday getaway
3. Day trip
4. Vacation 4+ nights
5. VFR
6. Passing through

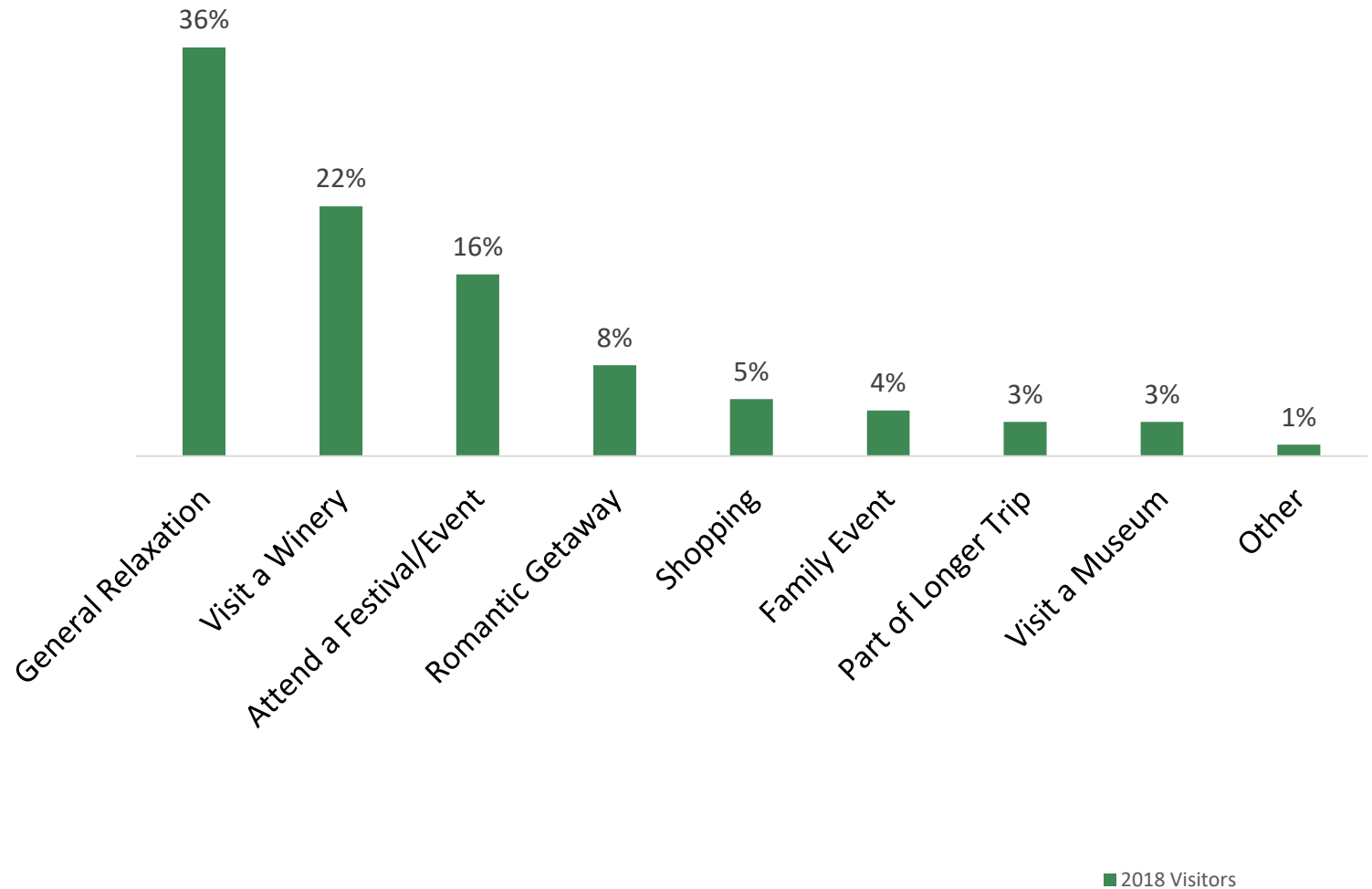
How would you categorize your trip?



Purpose of Vacation trip

1. General relaxation
2. Visit winery
3. Attend festival/event
4. Romantic getaway
5. Shopping
6. Family event
7. Part of a longer trip
8. Visit museum

What was the purpose of your last Vacation trip to the Finger Lakes Region?

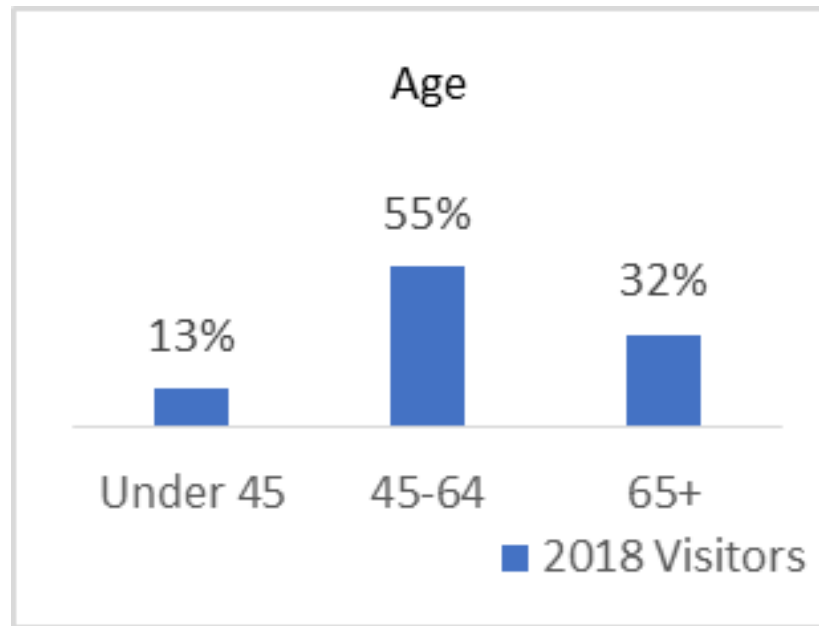


Who are the Visitors?

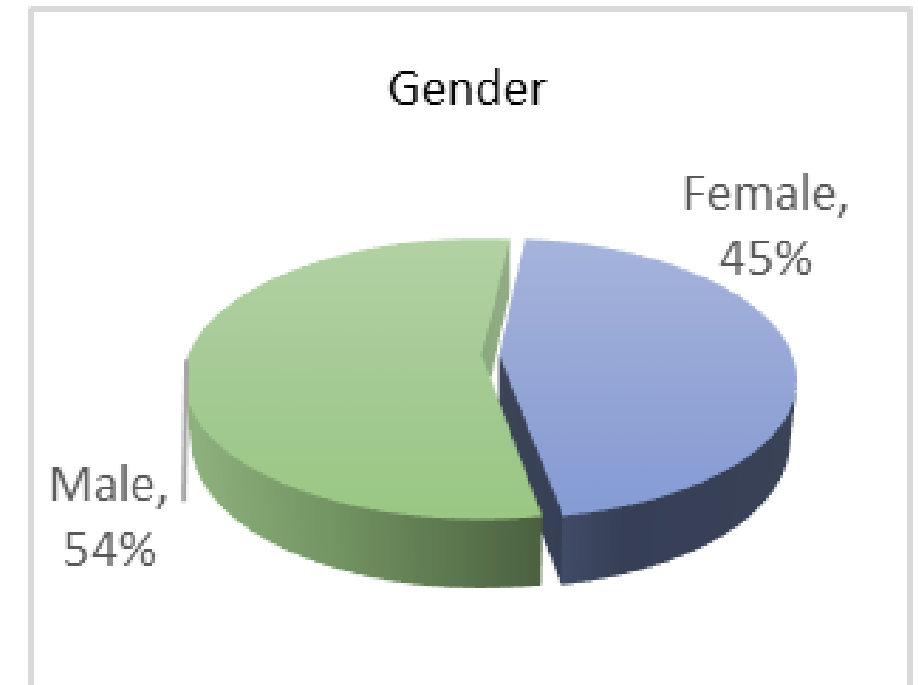
- Compared to 2006* the percent of male visitors increased (54%, up from 30% in 2006).
- Visitors today tend to be older: 59 years old vs. 48 years old in 2006.
- Engaging younger travelers is needed going forward

Footnote: Gender Other below 1%.

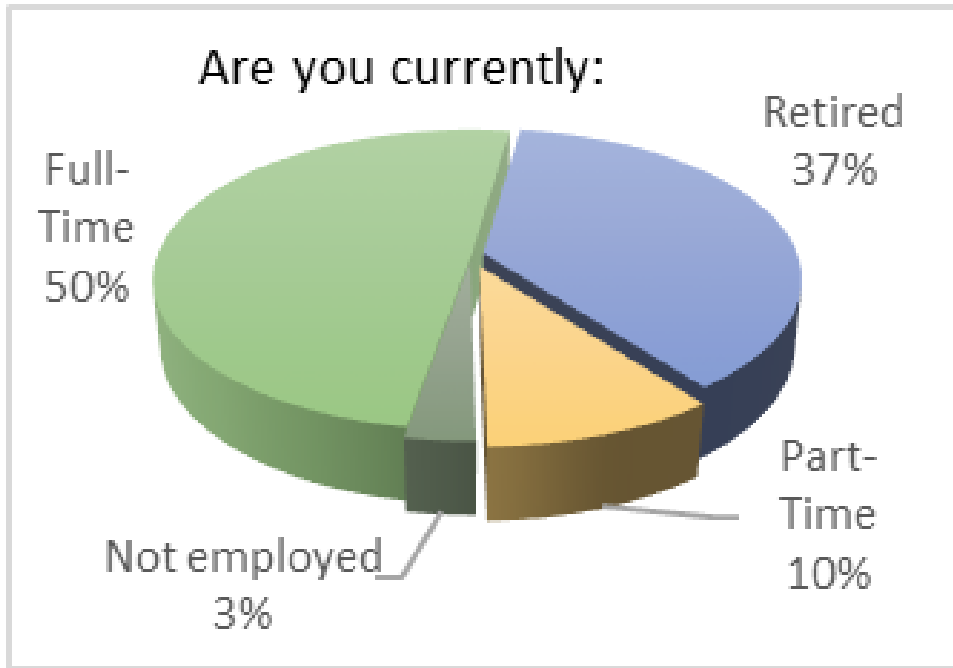
*Comparisons to 2006 study should be used with caution (see introduction).



The average age is 59 years old, with approximately half between 45 – 64 years old. Older visitors (65+) outnumber younger ones (<45) by 3 to 1.

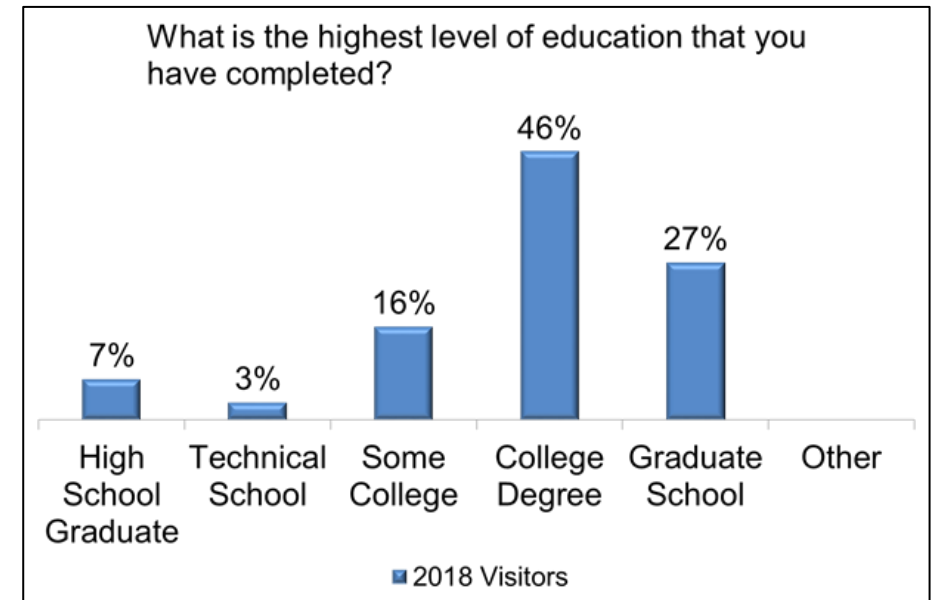


Who are the Visitors?



- Is either Employed Full-Time (50%) or Retired (37%).
 - Overnight visitors are more often retired compared to day-trippers (39% vs. 28%), who have a higher likelihood to be employed Part-Time (8% vs. 21%).
 - Residents are more likely than non-residents to be employed Part-Time (18% vs. 8%).

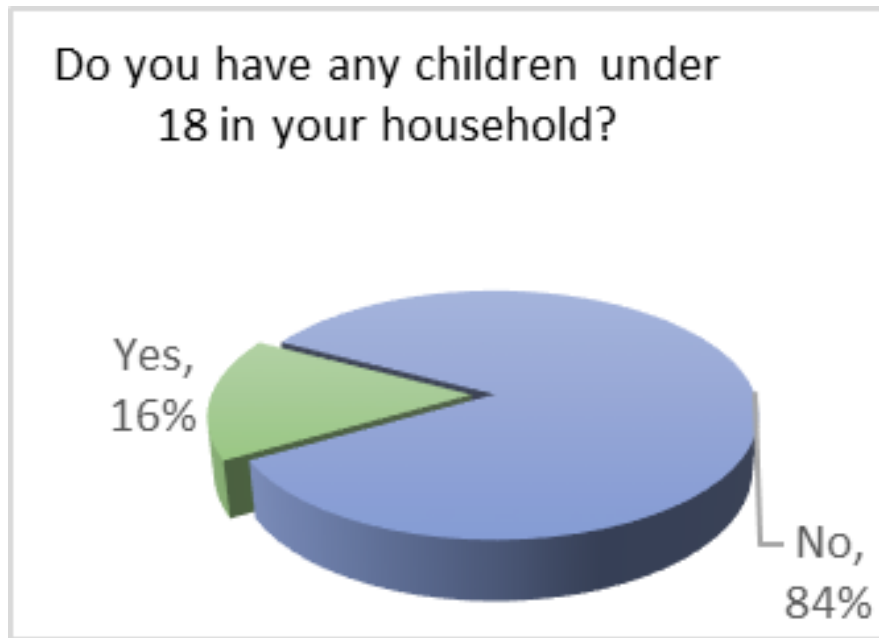
Has a College Degree (46%) or Graduate School (27%).



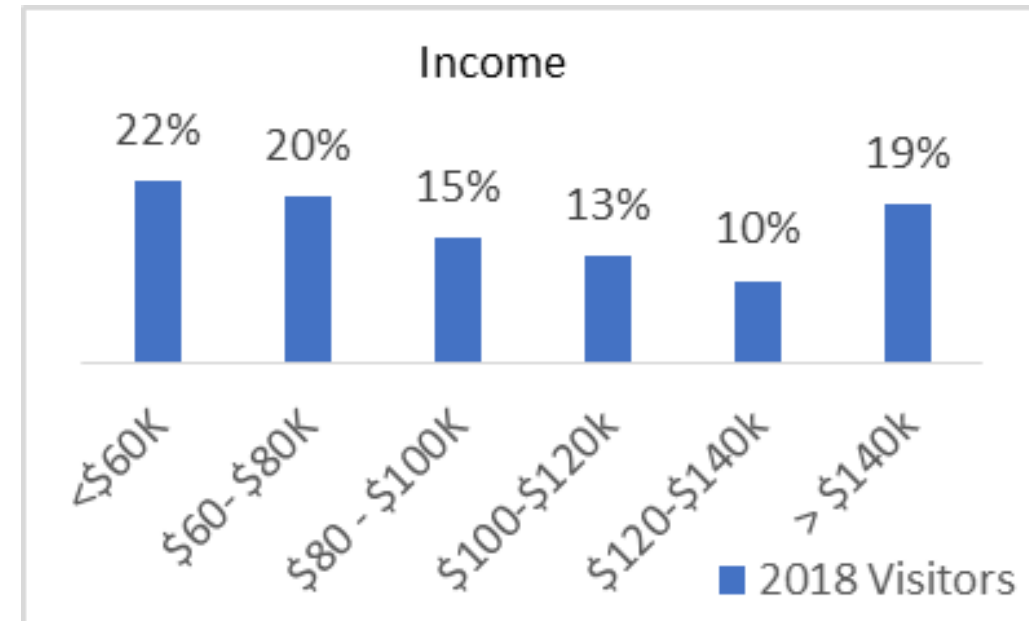
Who are the Visitors?

- The average household income for visitors to the Finger Lakes region was \$93,500.
- Compared to 2006*, visitor household income was \$80,000 (in today's dollars that is \$100,000).
- The median household income for New York State was \$59,269 (U.S. Census Bureau in 2015); and the U.S. Median household income was \$59,039 (U.S. Census Bureau 2017).

*Comparisons to 2006 study should be used with caution (see introduction).



- Earns either under \$80,000 (42%) or over \$120,000 (29%). The average income was \$93,500.
- Overnight visitors have higher incomes compared to day-trippers. 31% of overnight visitors earn over \$120,000 vs. 18% of day-trippers.
- Overnight visitors earn an average of \$95,800 vs. \$82,200 for day-trippers. Finger Lakes resident travelers earn the least at \$74,200.



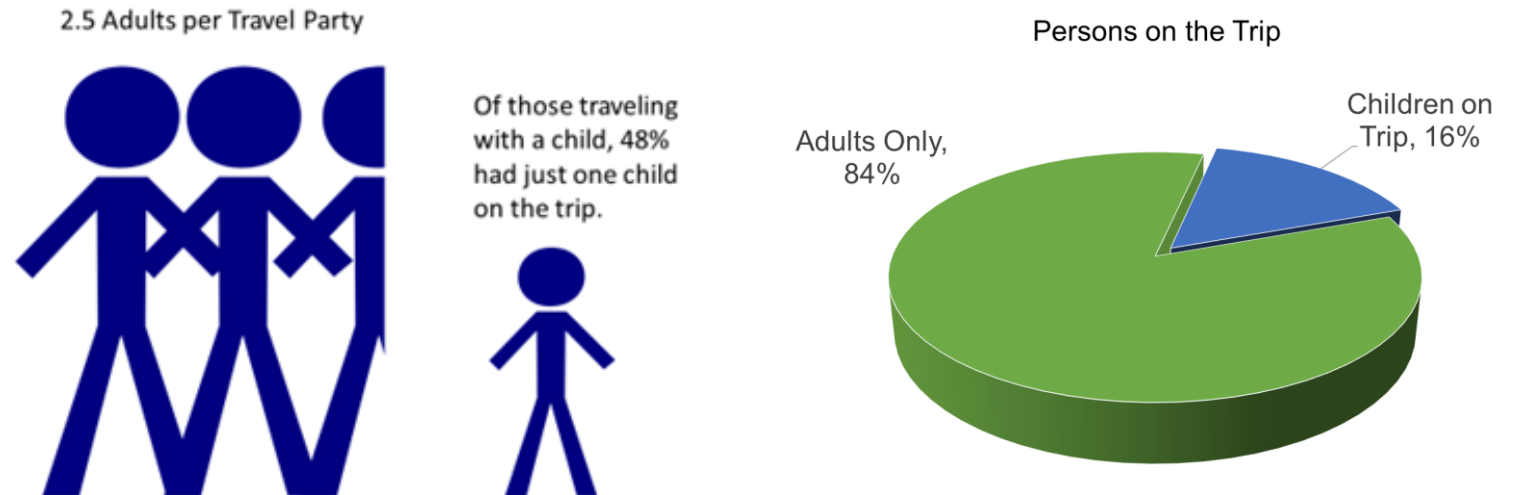
Party Composition

- Typical travel party consisted of 2.8 total persons
- Average # of Adults = 2.5
- Residents of the Finger Lakes were more likely to travel in larger groups – due to more children along.

By comparison, in 2018 fewer traveled with children (16%), compared to 22% in 2006*. However, the number of children on the trip increased to 2.5 in 2018 from 1.9 in 2006*.

*Comparisons to 2006 study should be used with caution (see introduction).

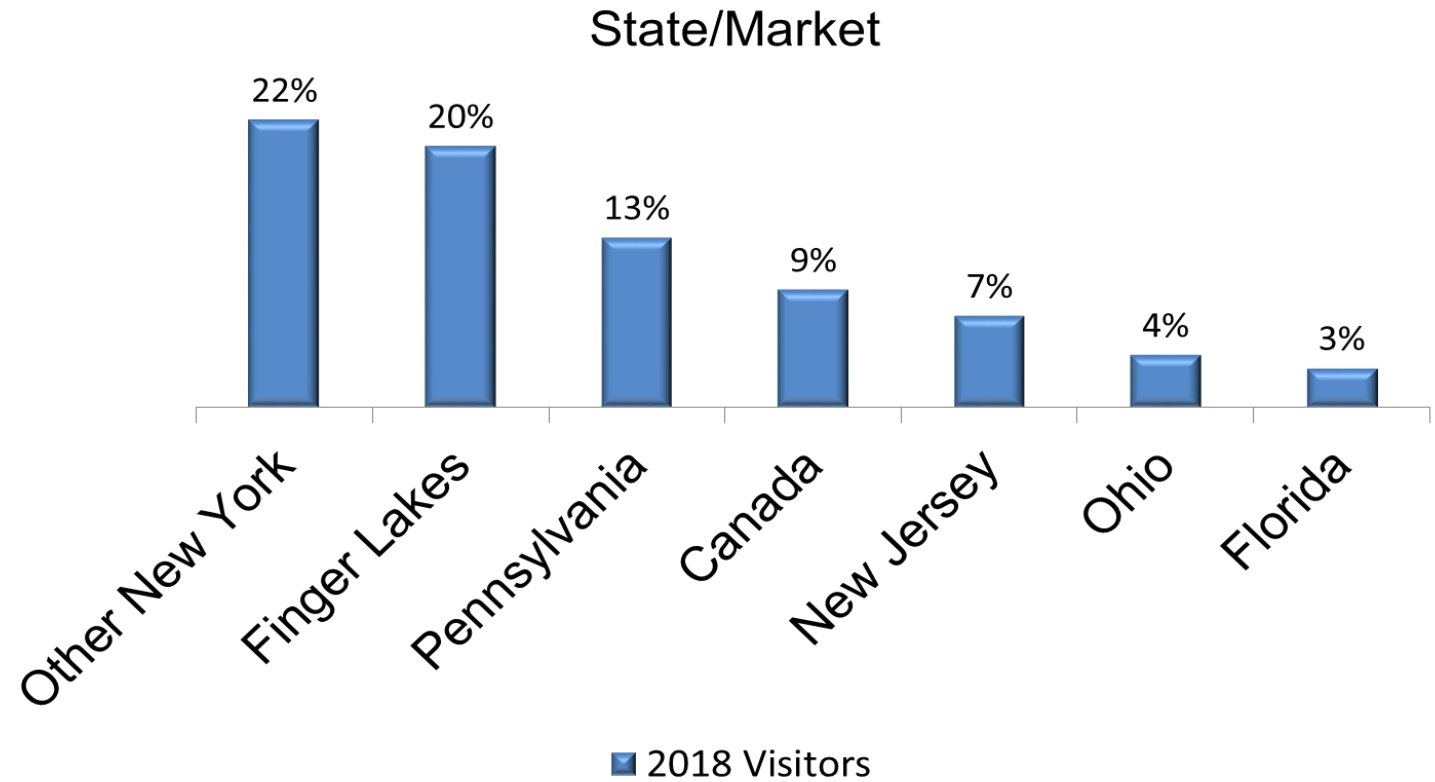
16% were traveling with children → of those the average number of children was 2.5.



- Overnight visitors were more likely to have a child on the trip compared to day-trippers (17% vs. 11%). 20% of resident travel parties included a child.
- 48% of those with a child on the trip, had only 1 on the trip, 30% had 2, and 21% had 3 or more.

Residence of Visitors

- 40% live in NYS.
- 20% from Finger Lakes Region and 22% of NY residents are from outside the region.
- Top three outside NYS:
 - ❖ Pennsylvania
 - ❖ Canada
 - ❖ New Jersey



Residence of Visitors By Zip Code

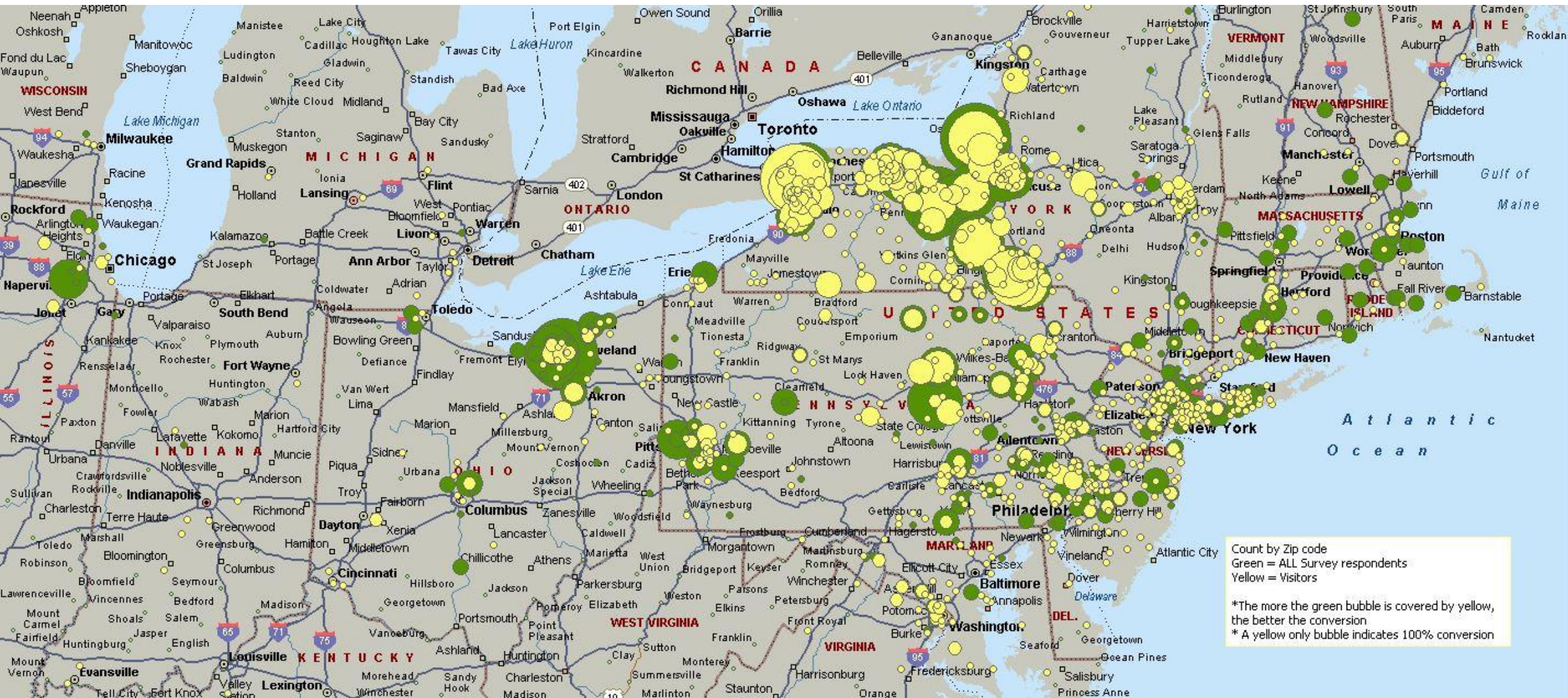
Yellow = Visitors

Green = Inquirers

The more the green bubble is covered by yellow the better the conversation rate.



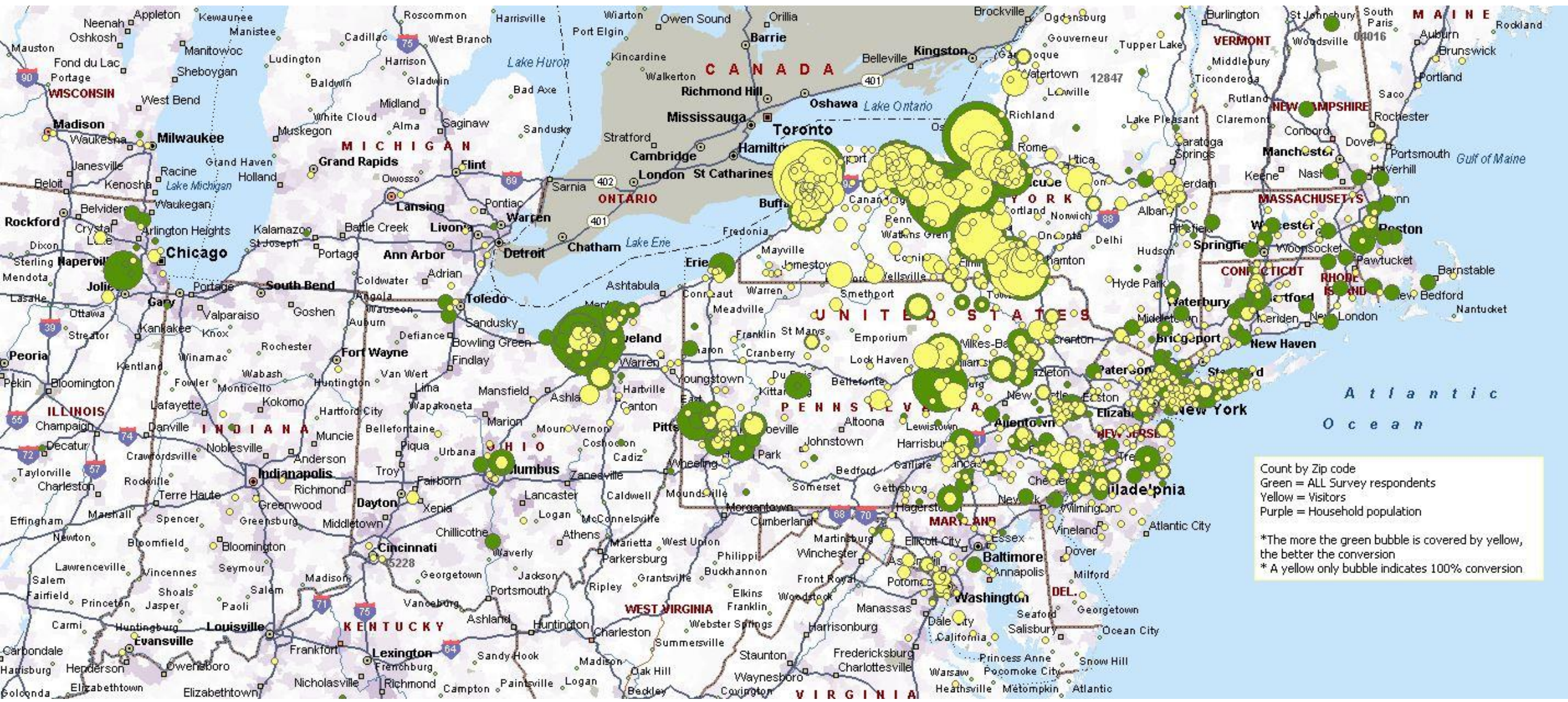
Yellow = visited; Green = inquiry but did not visit



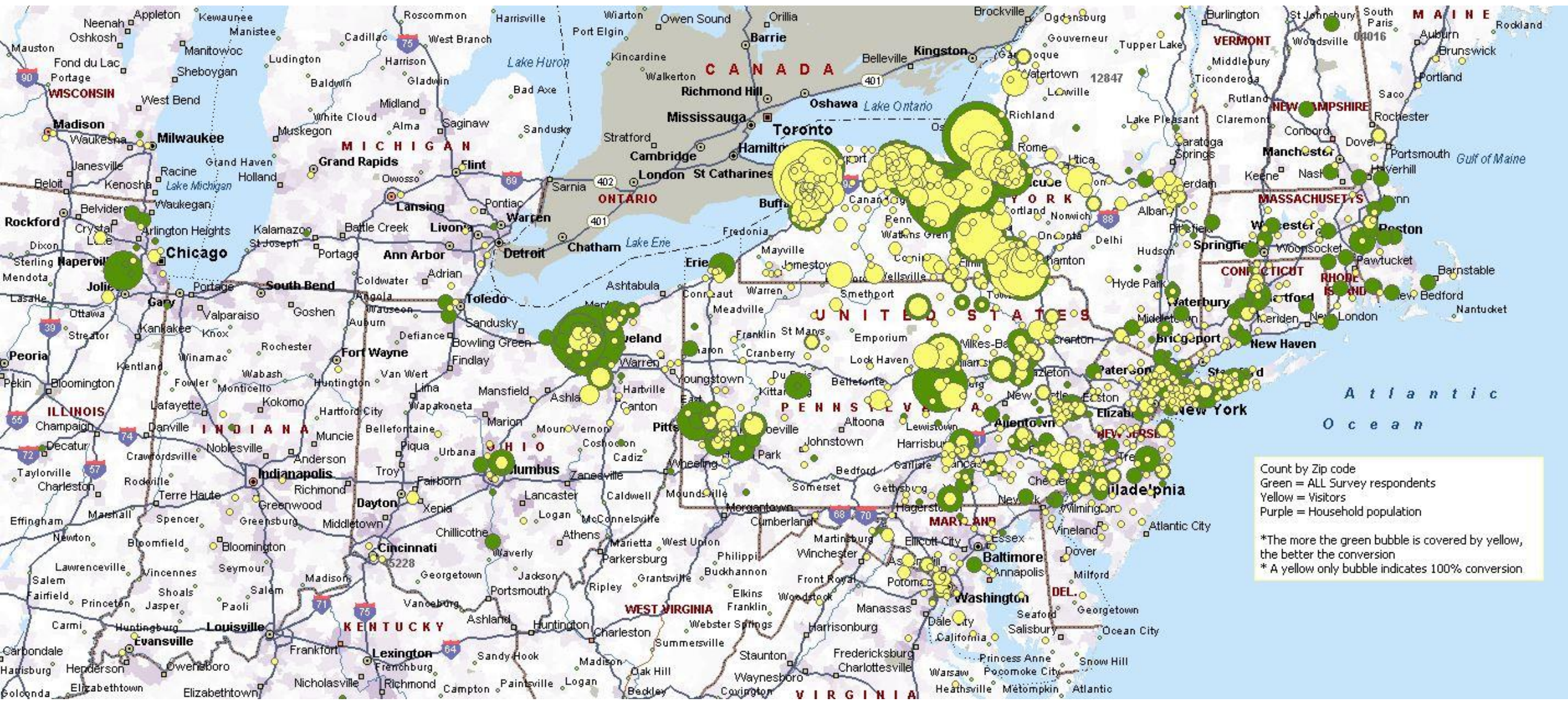
Canadian Visitors (Yellow = visited; Red = inquiry but did not visit)



Household income is darker shade (Yellow = visited; Green = inquiry but did not visit)



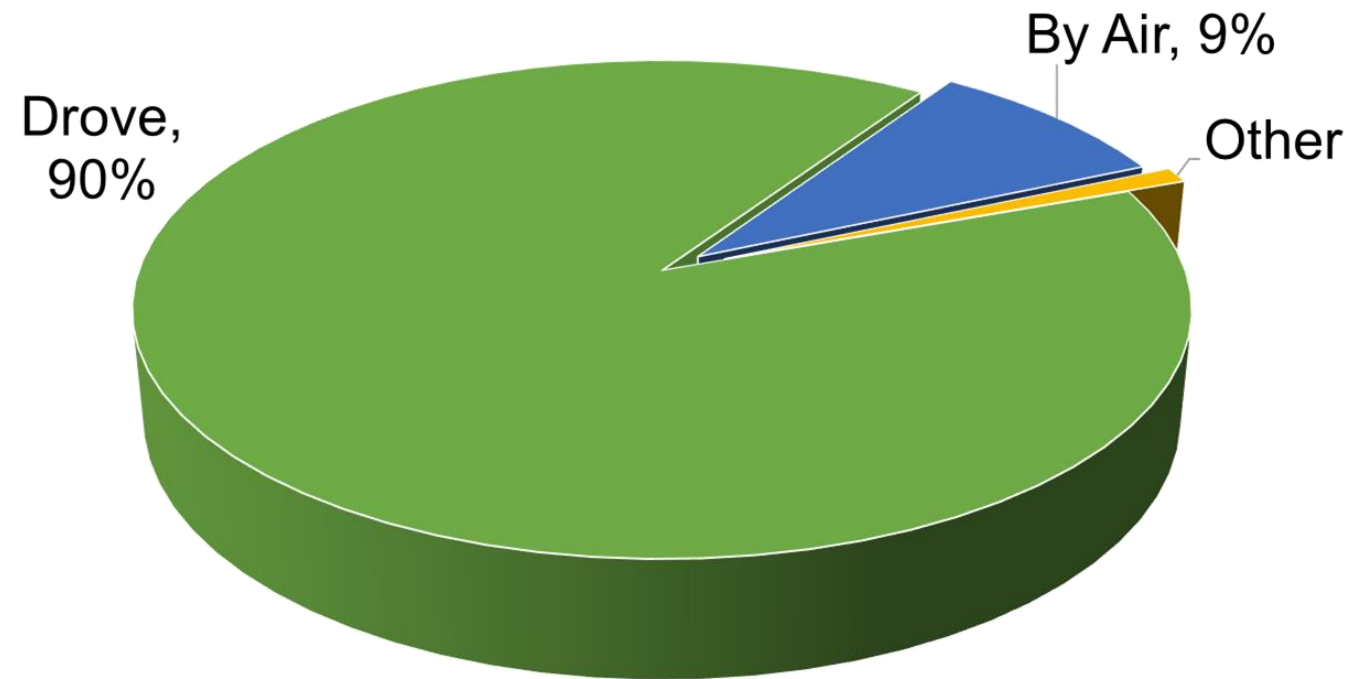
Household population is darker shade (Yellow = visited; Green = inquiry but did not visit)



Transportation

- 90% of visitors that live outside of the Finger Lakes region drove.
- Nearly one in ten flew to the region.
- Overnight visitors are more likely than day-trippers to fly (11% fly vs. 1% of day-trippers).
- Among those flying in 71% arrived via Syracuse, 19% Rochester, 5% Ithaca, and 5% Other.
- 1% of visitors used other means to enter the region (walk, train, bus).

How did you enter into the Finger Lakes Region (non-residents only)

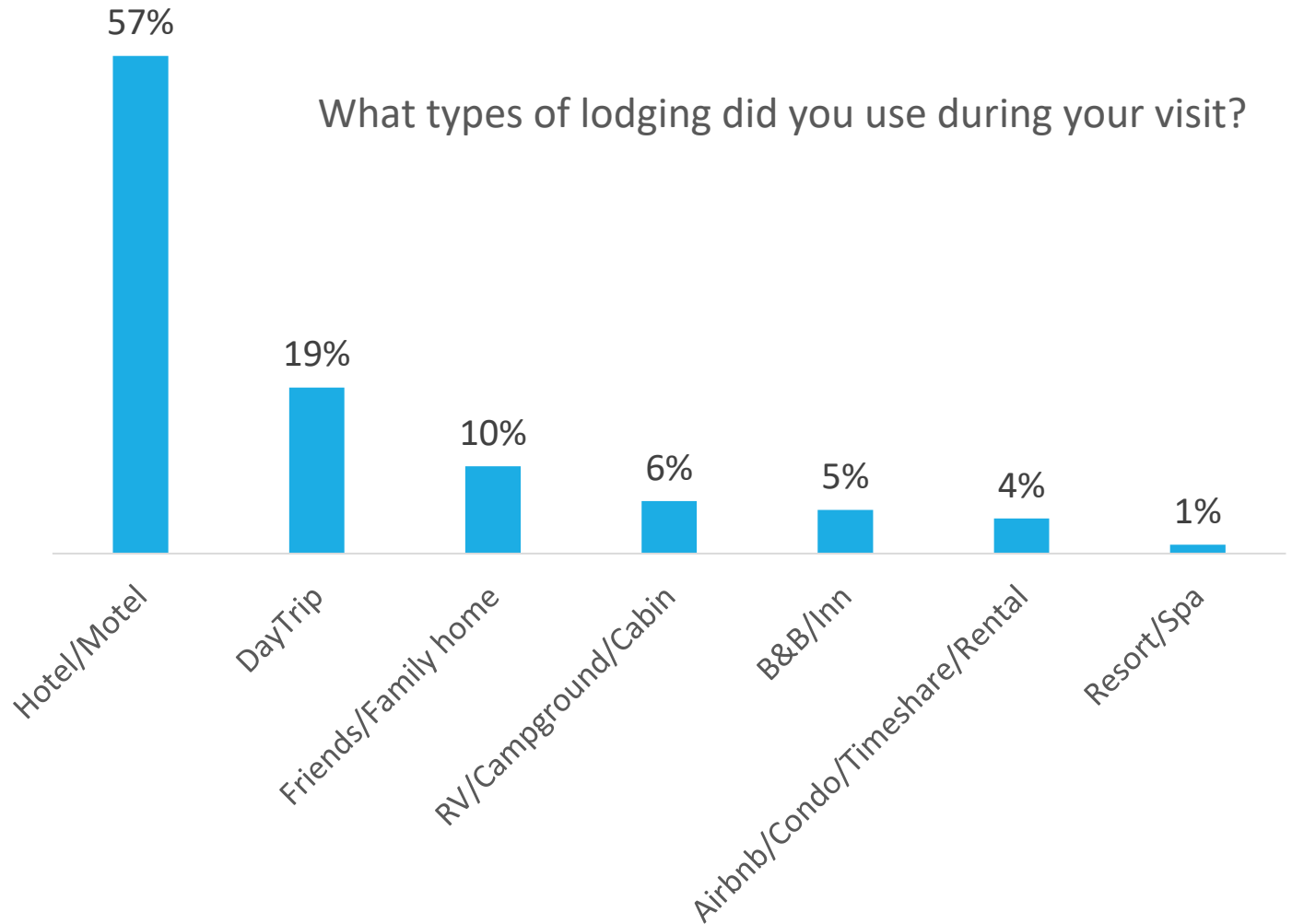


Accommodations

- Majority (57%) used a Hotel/Motel.
- One in ten stayed with Friends and Family.
- 6% RV/campground/cabin.
- 5% Bed and Breakfast/Inn.
- 4% Airbnb/condo/timeshare/rental.
- 19% were day-trippers.

- ❖ For residents, 28% used a Hotel/Motel and 9% stayed with Friends or Family.
- ❖ Non-residents stayed mainly in Hotel/Motels (64%).

*Comparisons to 2006 study should be used with caution (see introduction).



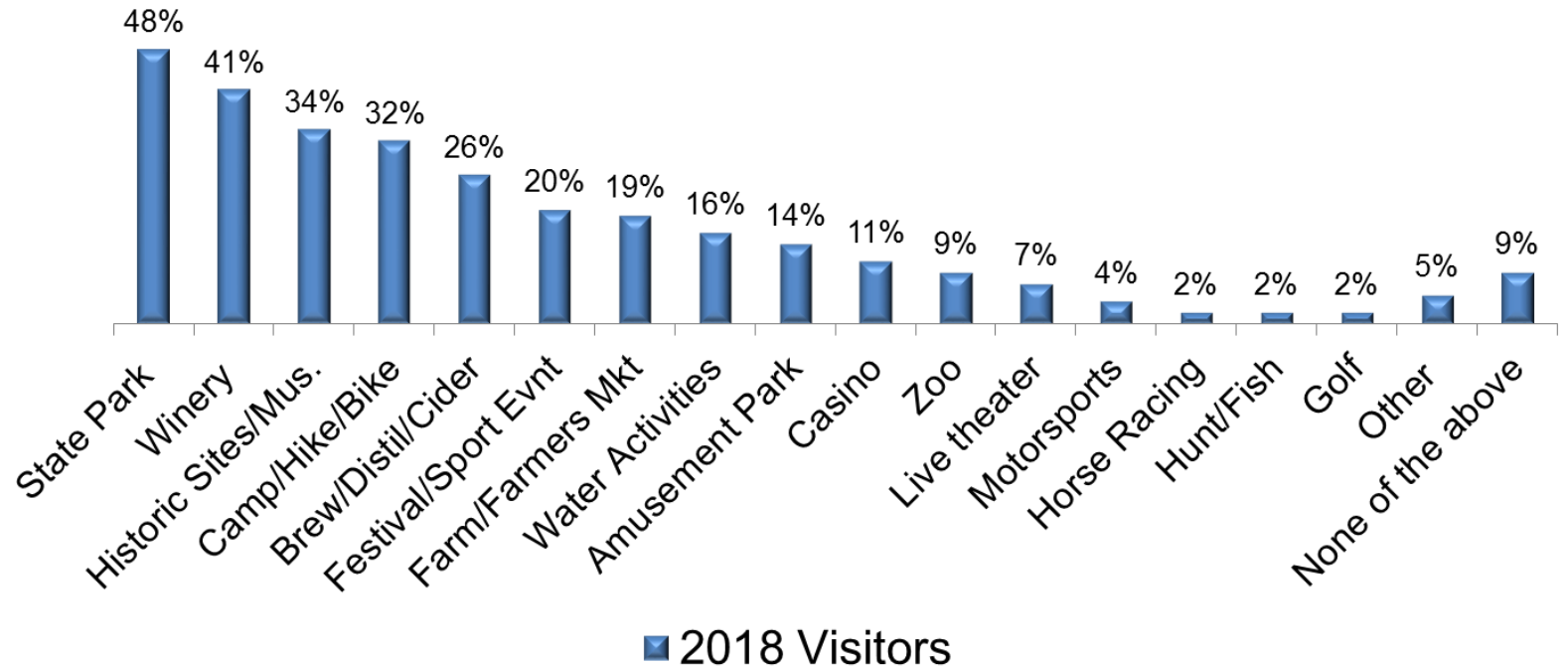
Compared to previous studies, Hotel/Motel and Friends/Family use increased, while B&B decreased. Removing day trips, Hotel/Motel is at 70% vs. 58% in 2006*. Friends/family is at 12% vs. 2% and B&B is at 4% vs. 19%.

Trip Activities

1. State park
2. Winery
3. Historic sites/museums
4. Camp/hike/bike
5. Brewery/distillery/cider
6. Festival, sports, event
7. Farm/farmers market
8. Water activities
9. Amusement park
10. Casino

Note: consistent for day/overnight visitors and residents vs. non-residents.

Please check all activities that at least one member of your travel party participated in while visiting the Finger Lakes Region.



A typical visitor will participate in approximately 3 activities (2.9).

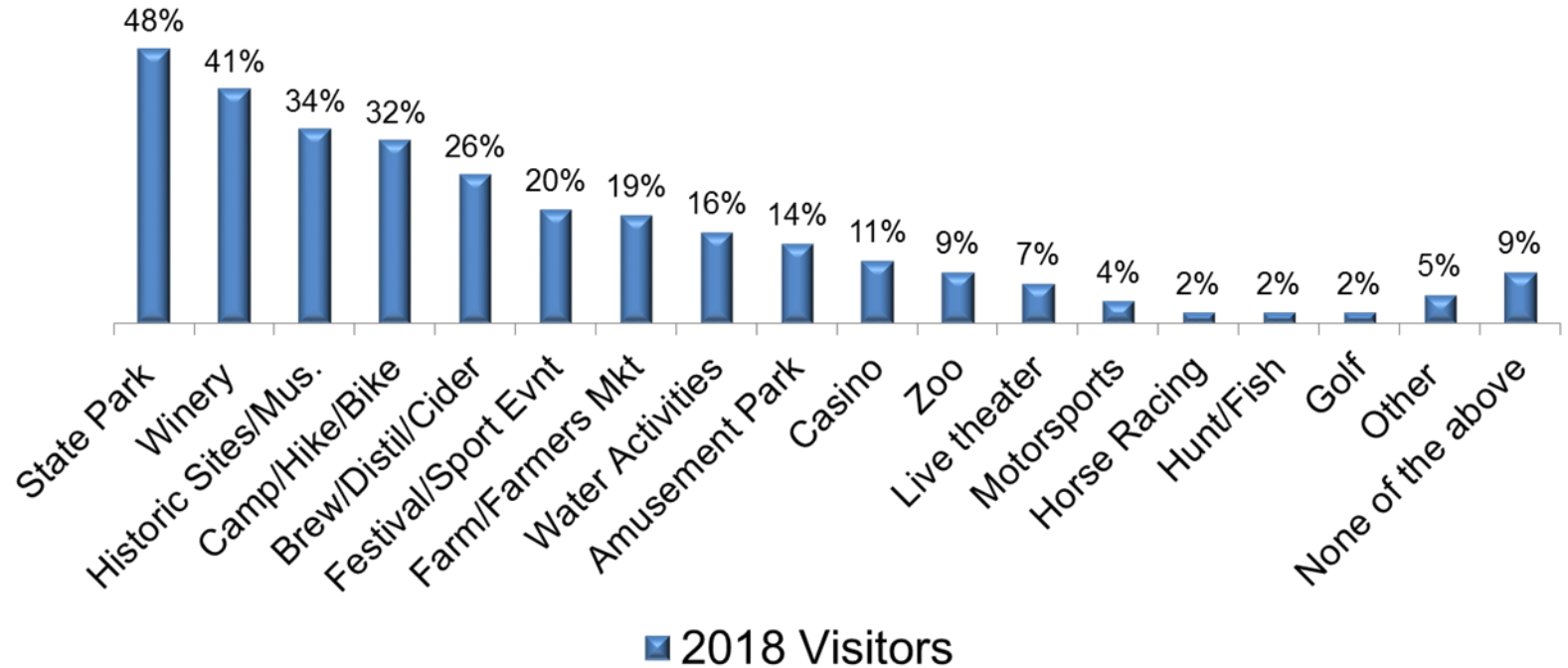
Trip Activities

(continued)

Residents and day-trippers actually participate in slightly more (greater variety) of activities compared to non-residents/overnight visitors.

Residents are more likely to participate in a Festival (30%), Amusement park (22%), Zoo (19%), or Motorsports (9%).

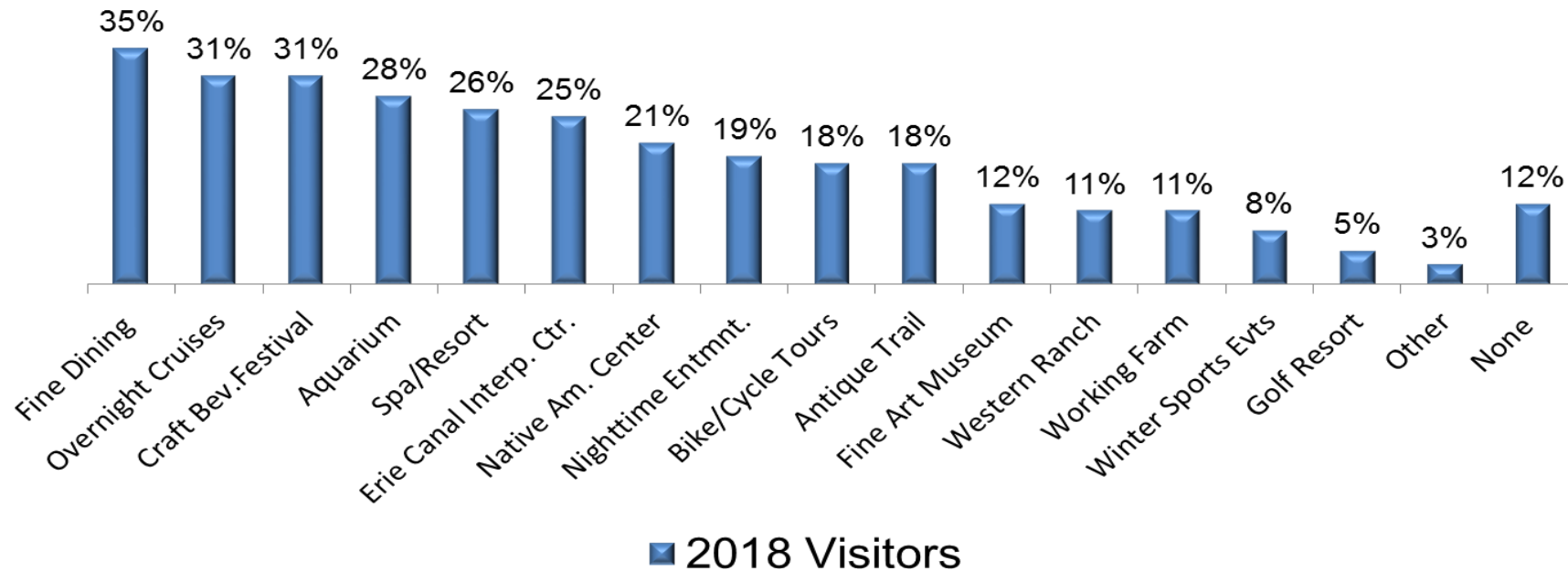
Please check all activities that at least one member of your travel party participated in while visiting the Finger Lakes Region.



A typical visitor will participate in approximately 3 activities (2.9).

Visitors were asked to check activities that they would have participated in if they were aware of it and it was available while they were in the Finger Lakes Region. The top three items were: More Fine Dining Restaurants (35%), More Craft Beverage Festivals (31%), and Overnight Canal/Lake Barge Cruises (31%).

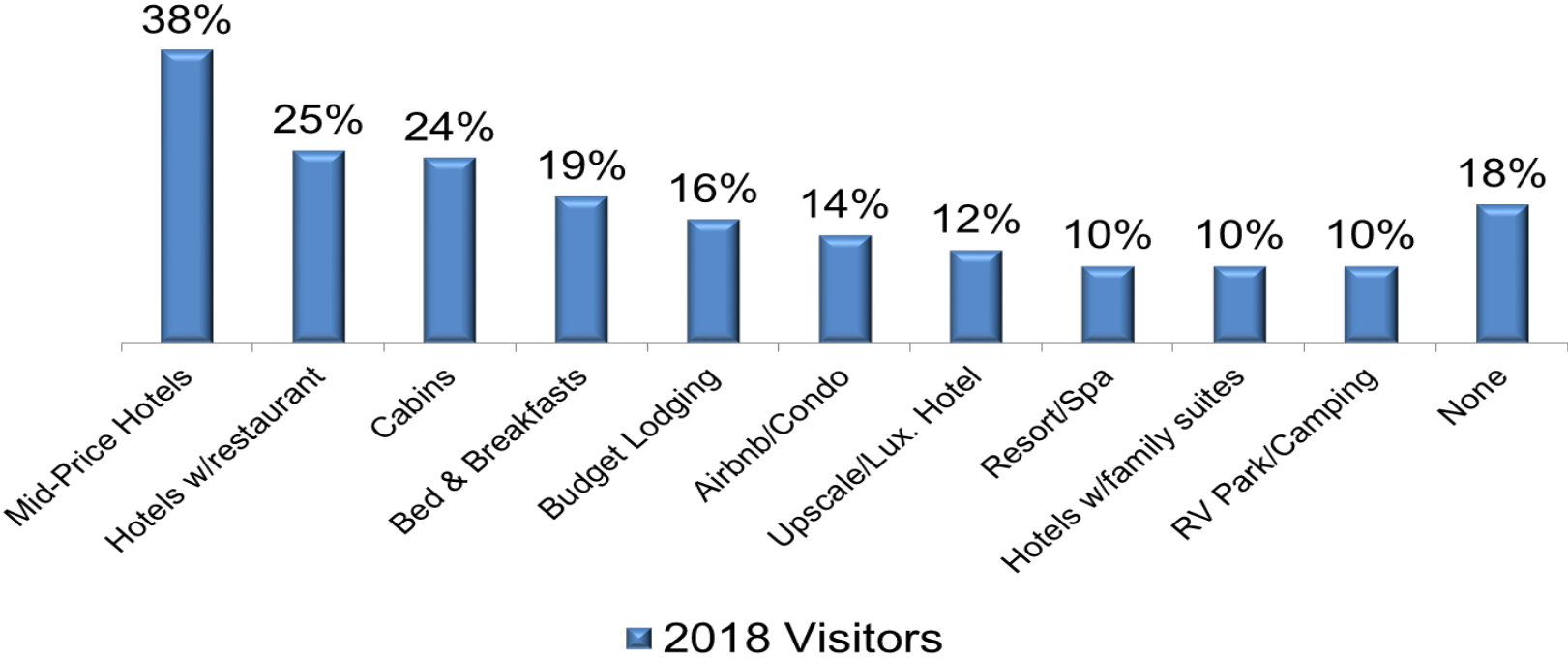
Which of the following activities would you have participated in if you were aware of it and it was available while you were in the Finger Lakes Region ?



In terms of Lodging options, when asked what visitors would like to see more of in the Finger Lakes, Mid-Priced Hotels were the most requested (38%). This was followed by Modern Full-Service Hotel with Restaurant (25%) and Cabins (24%). Nearly one in five responded with None (18%).

Day-trippers showed a higher interest in Cabins (34%) and Airbnb/Condo/Timeshare/Rental (24%).

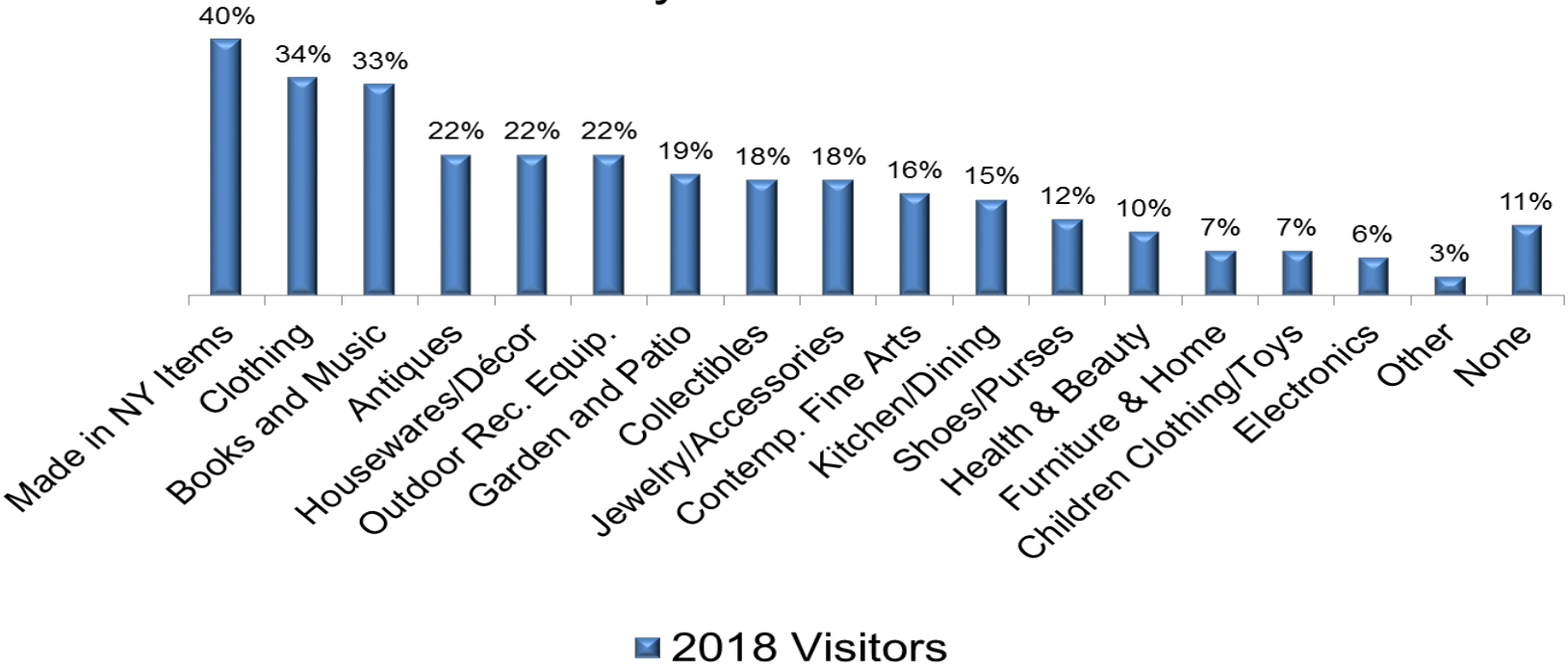
What kind of lodging would you most like to see more of in the Finger Lakes Region?



In the area of potential new retail or areas where visitors would have been interested in shopping for in the Finger Lakes, the top interest is Made in New York Items (40%), followed by Clothing (34%) and Books/Music (33%).

Overnight visitors were more interested in Clothing (37%). Residents were more interested in Made in New York Items (56%) and Garden/Patio (32%) and least interested in Clothing Stores (18%).

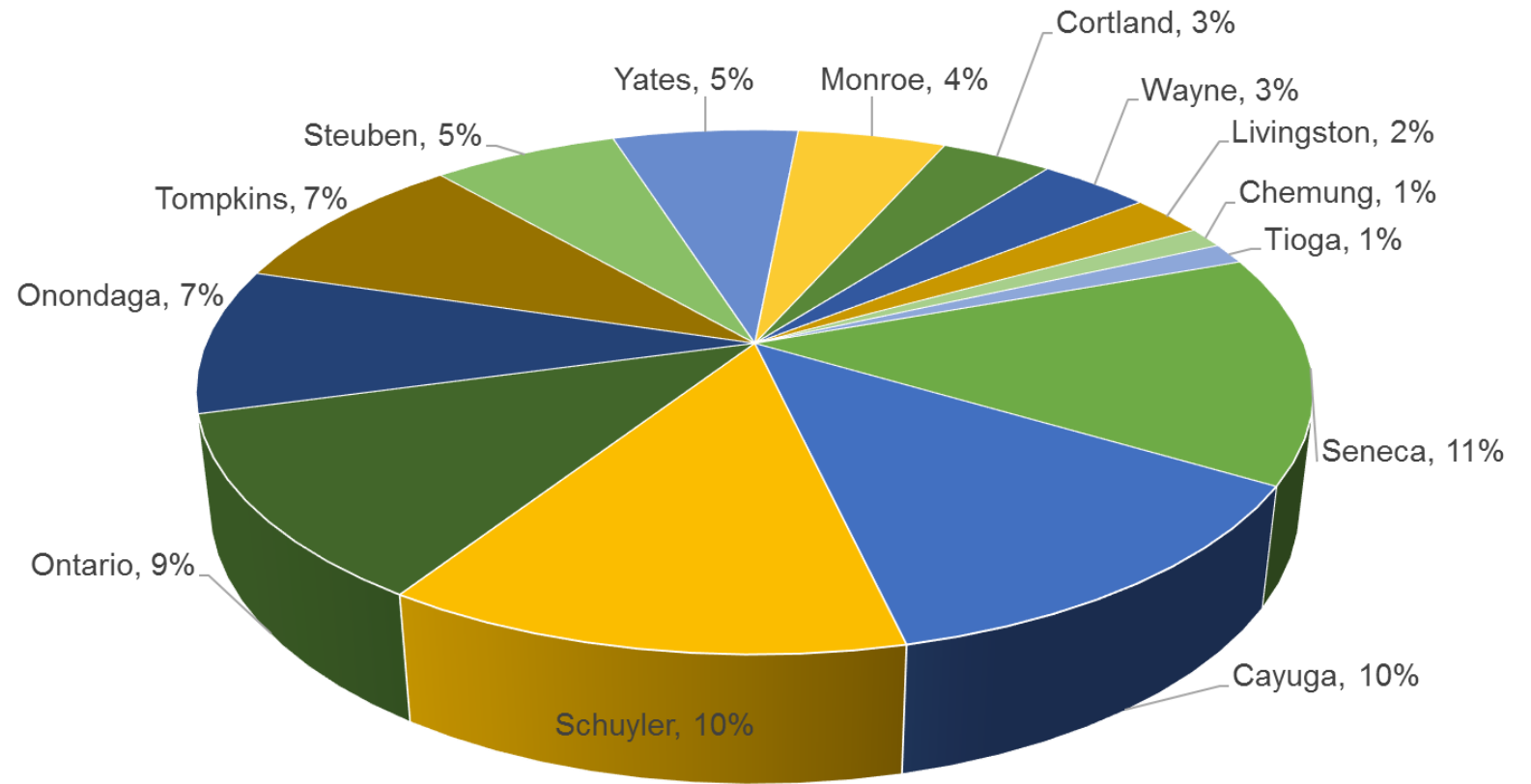
What kind of retail shop merchandise appeals to you most?



Visitor Distribution

- Overnight visitors included slightly more counties (43% visited only one, compared to 48% for day-trippers).
- The top counties visited are evenly distributed across 4 counties: Seneca (11%), Cayuga (10%), Schuyler (10%), and Ontario (9%).
- Residents had higher visitation rates for Schuyler (16%) and Ontario (15%) counties.

Counties Visited During Trip (aided by map)



On average, travelers visited 2.2 Finger Lakes counties on their trip.

Nearly half visited only one county (44%), while 23% visited two counties and 17% visited three.

Travel Times

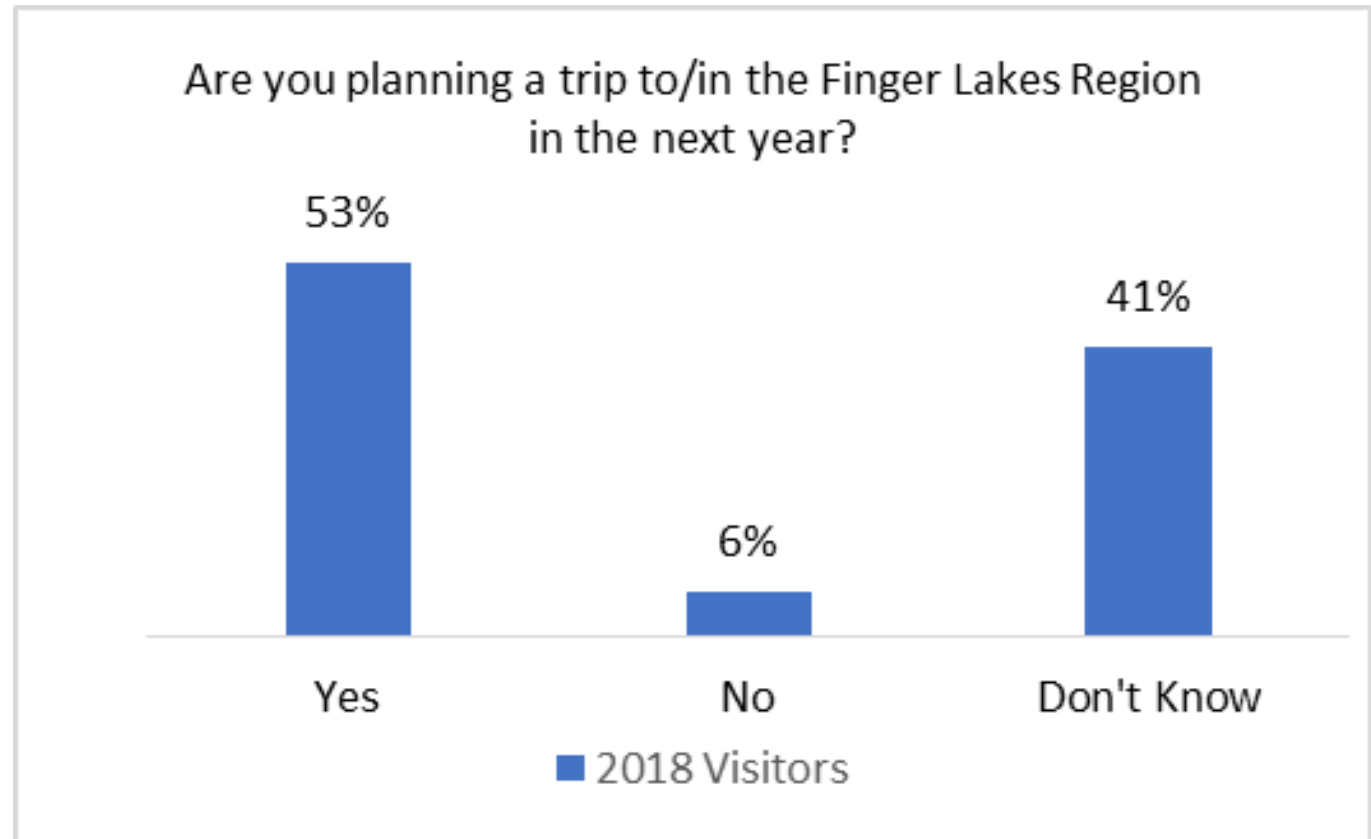
Respondents in the survey were likely biased to late summer/fall due to the timing of the survey.

- 53% visited in the summer (May – August).
- 40% visited in the fall (September/October – the main months of the survey).
- 7% of trips were between November 2017 and April 2018.
- This was consistent across all visitor types.

Potential for Return Trip

- 73% of day-trippers were planning to return (vs. 49% for overnight visitors).
- 80% of residents were planning another trip (vs. 45% for non-residents).
- Only 6% said they were NOT planning to return next year.

The Majority of visitors plan to return to the Finger Lakes!



Potential for Return Trip

- 57% plan to return to the region in winter.
- 34% plan to return in summer.
- 28% plan to return in the fall.
- 24% are not decided but still want to return next year.

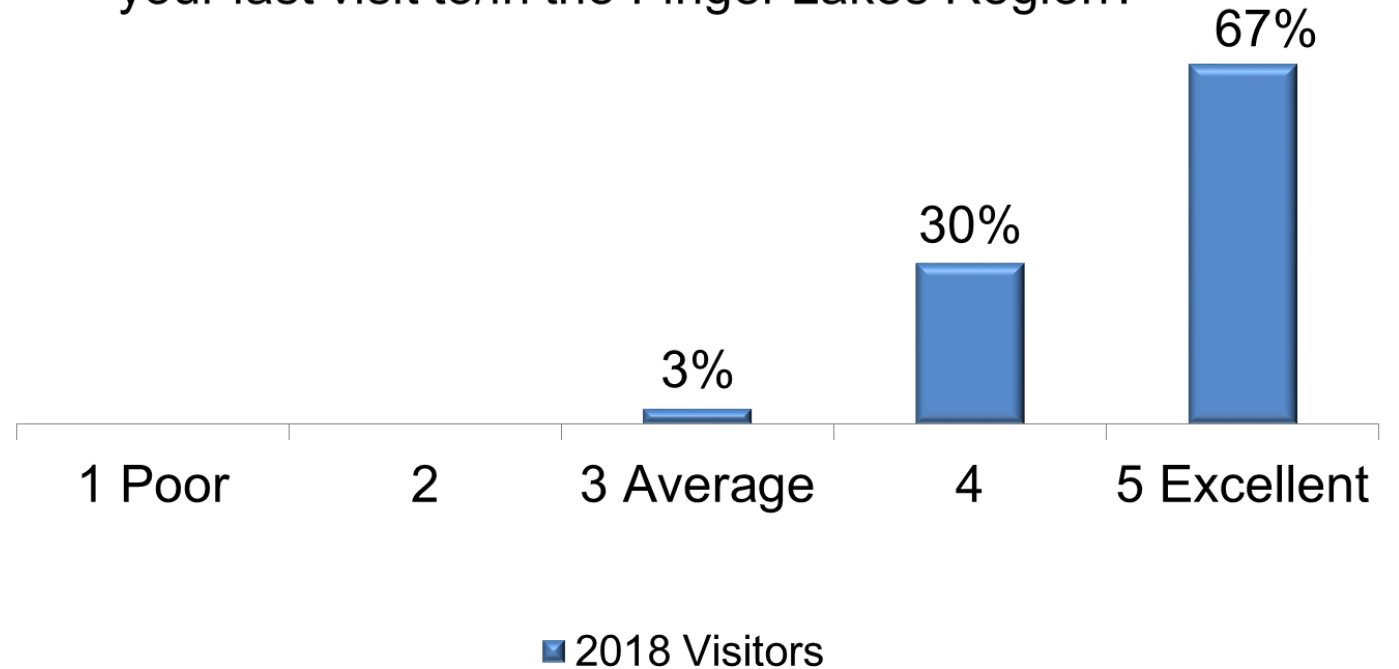
The Majority of visitors plan to return to the Finger Lakes!



Visitor Satisfaction

- Nearly ALL visitors were satisfied with their visit to the Finger Lakes Region!
- Two thirds of all visitors rated their visit as excellent!
- NO ONE rated their experience as poor!

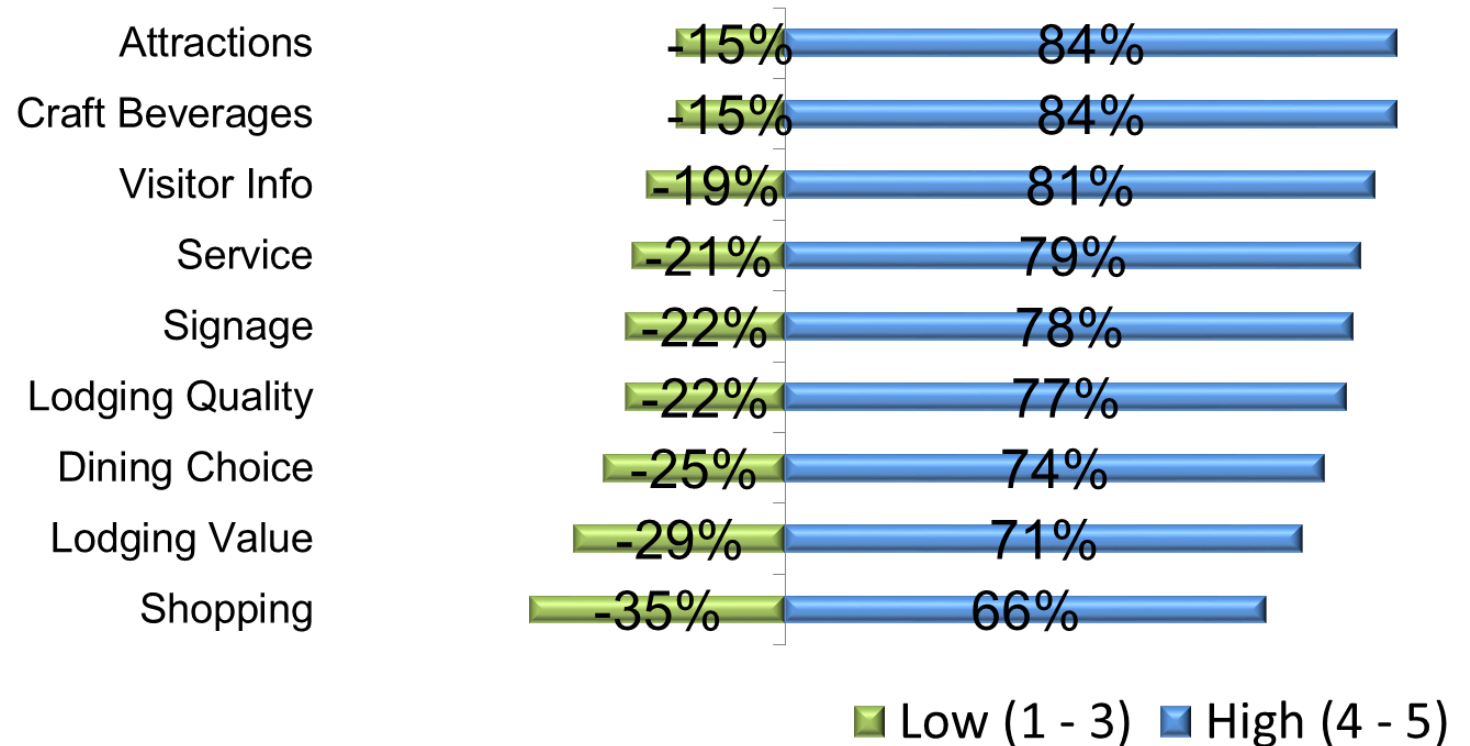
Using a 5-point scale (where 1 is Poor, 3 is Average, and 5 is Excellent), how would you rate your last visit to/in the Finger Lakes Region?



Visitor Satisfaction

- Attractions and craft beverages ranked highest with 84% ranking satisfaction higher or better.
- 81% felt visitor information provided by FLTA was strong.
- Service and signage was well received but leaves room for improvement.
- Lodging quality, dining choice, and lodging value are all areas the region needs to consider and seek ways to improve.
- Shopping, at 66% satisfied and 35% rating it average or below, is an area that needs attention region wide.

Considering your last visit, and using a 1- 5 scale, please rate each of the following.

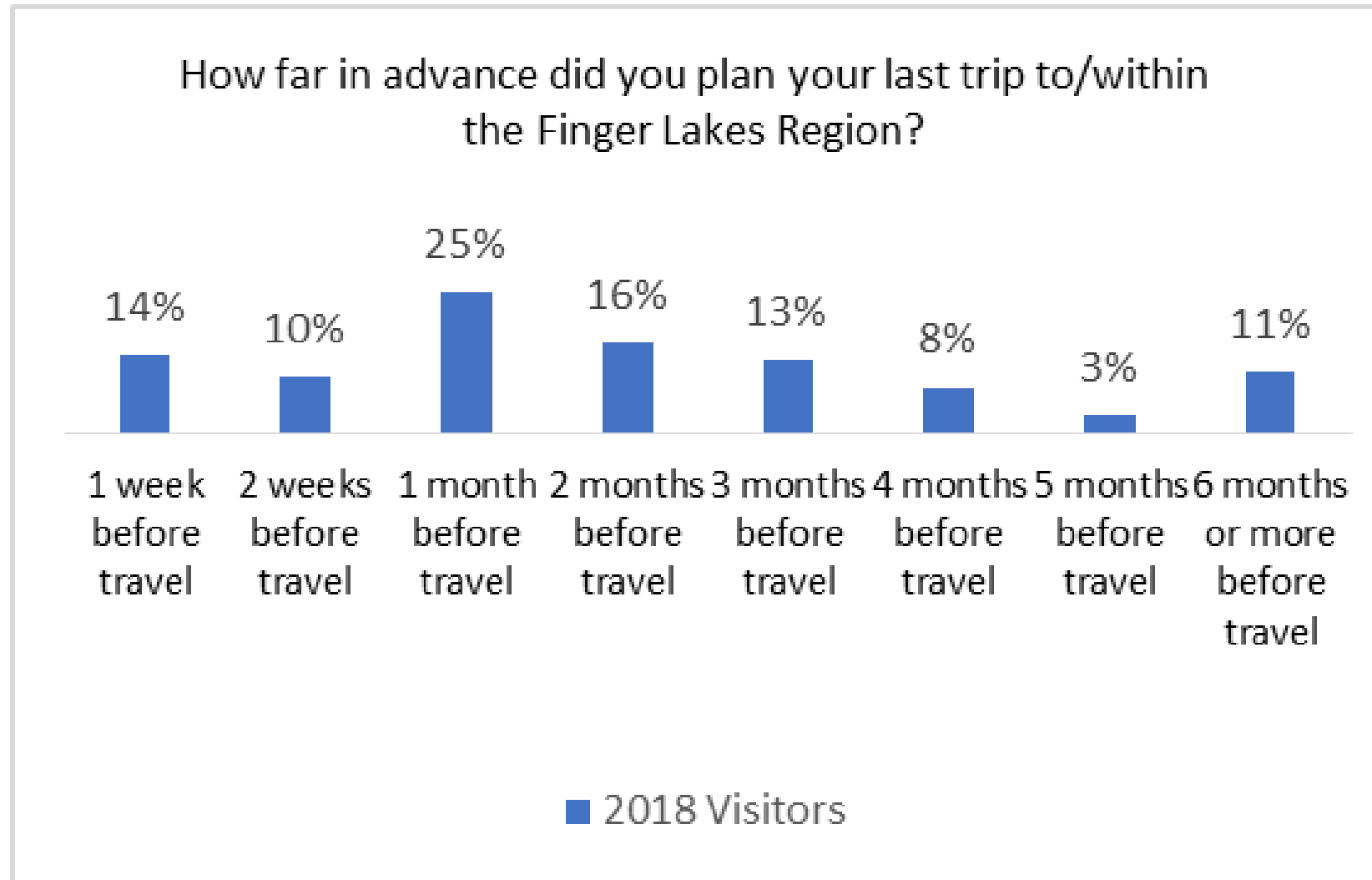


Residents were slightly more likely than non-residents to rate as Excellent: Craft Beverages (69% vs. 59%) and Attractions (55% vs. 45%).

Day-trippers were slightly more likely than overnight visitors to rate as Excellent: Attractions (67% vs. 43%), Level of Service/Employee Training (40% vs. 30%), Shopping (41% vs. 27%), Dining Choices (50% vs. 36%). Low ratings by overnight visitors for Shopping, Service, and Dining Choices were significant.

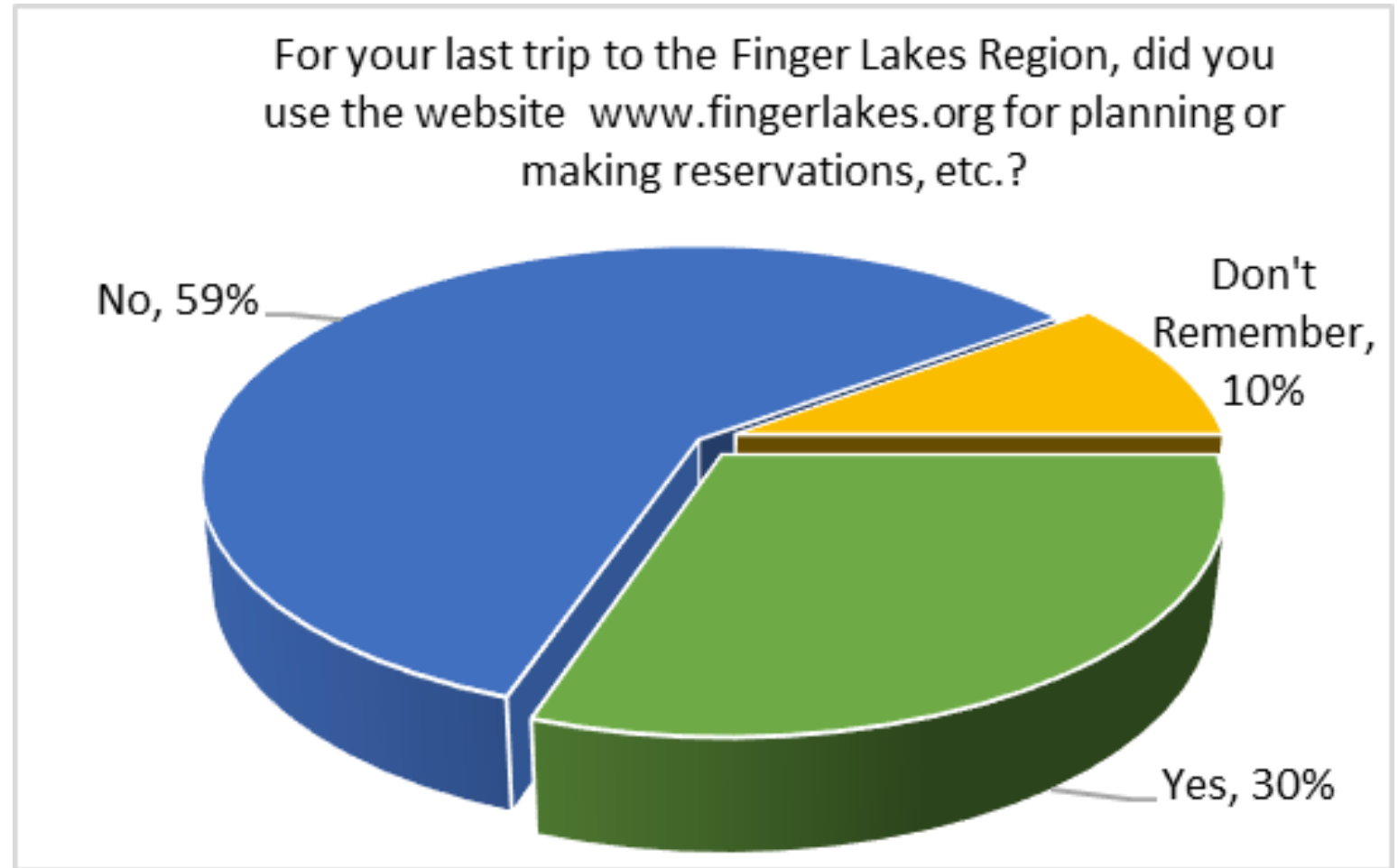
Trip Planning – Decision Making

- The majority of visitors plan their trip within one month of the trip.
- 24% plan it just two weeks in advance, while 25% plan it one month out.
- Only 22% use more than 4 months to plan their trip.
- Day-trippers and residents have a shorter planning cycle (43% and 35% respectively plan it within one week of the trip).
- Overnight and non-resident visitors tend to plan their trip 1 to 3 months out (57%).



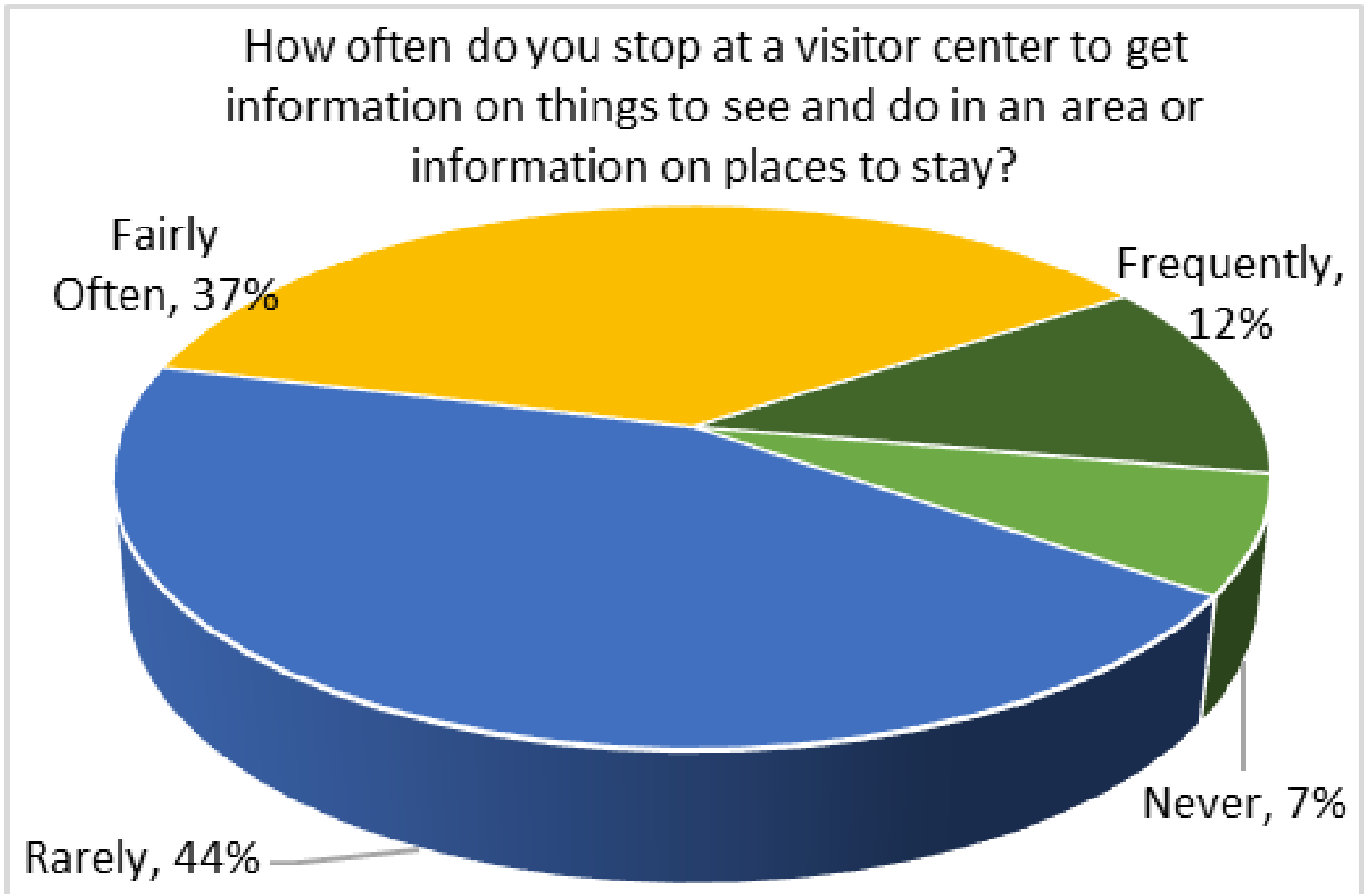
Used www.fingerlakes.org

- Three out of ten visitors recalled using the website www.fingerlakes.org for planning or making reservations.
- Majority said no and 10% did not remember.
- Overnight visitors were significantly more likely to recall using the site, compared to day-trippers (34% vs. 12%).
- Non-residents were more likely than residents to recall using the site (34% vs. 19%).



Used a Visitor Center

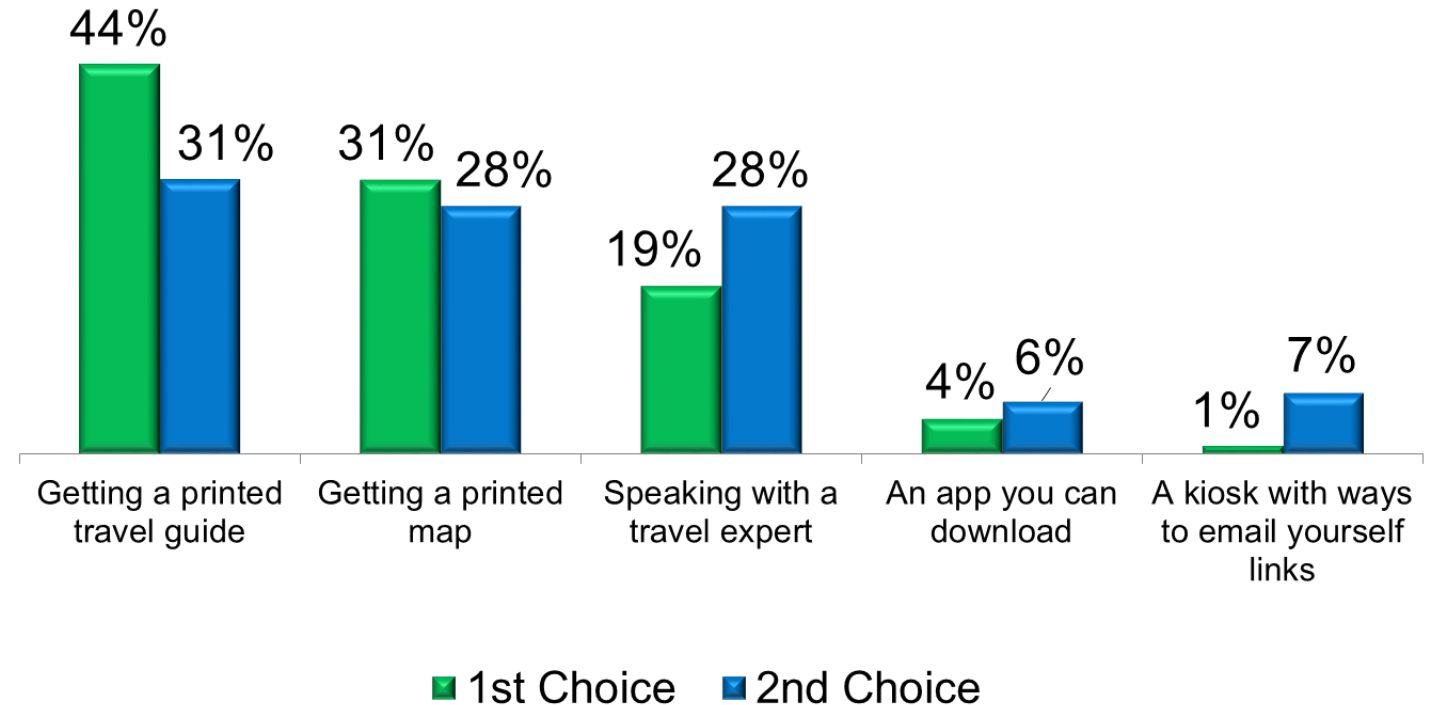
- Nearly half of visitors will stop at a Visitor Center to get information on things to see and do in an area or information on places to stay (12% Frequently, 37% Fairly Often).
- Overnight visitors and non-residents are more likely to use Visitor Centers (54% for overnight and 55% for non-residents).



Used a Visitor Center

- Once at a Visitor Center, the most preferred method to receive information is by Getting a Printed Travel Guide (44%).
- Followed by Getting a Printed Map (31%).
- About one in five prefer Speaking with a Travel Expert. However, after their first choice, Speaking with a Travel Expert is most often their second choice (31%).

When at a visitor center, what is your most preferred method to receive information?





Comprehensive Regional Travel and Tourism Study – Trade Survey Section

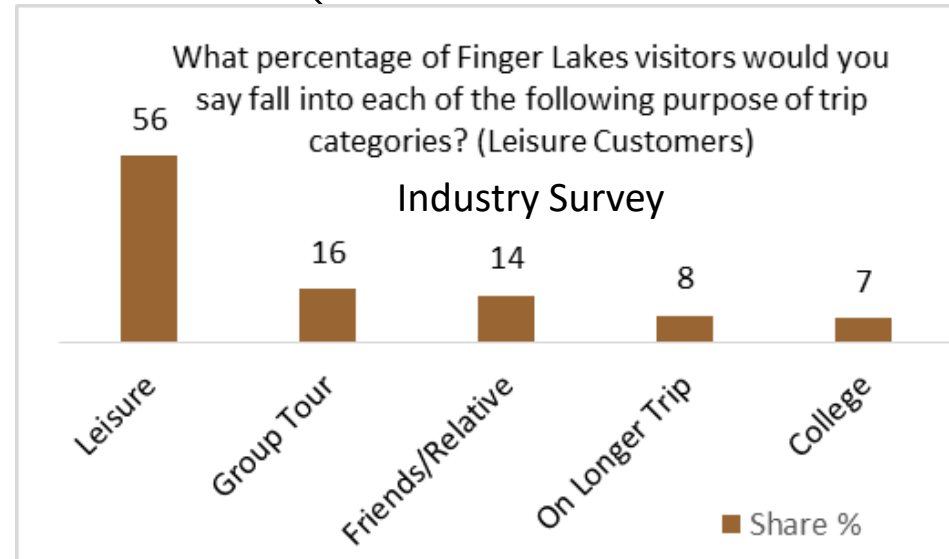
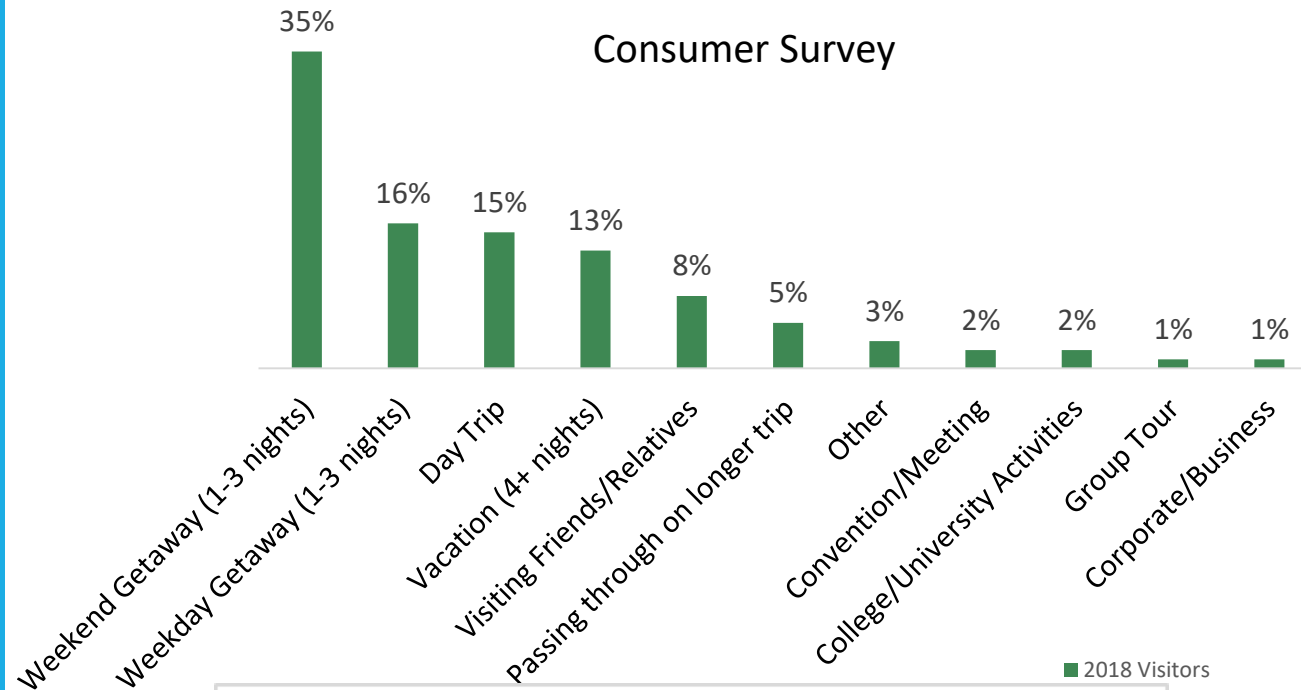
PRODUCED FOR: FINGER LAKES TOURISM ALLIANCE



Types of Trips – Industry Perception (Industry Survey)

- Industry perception by purpose is much higher for:
 - Group tour 16% vs 1%
 - Visiting Friends/Relatives 8% vs 14%

How would you categorize your trip?



Party Composition

Typical travel party consisted of 2.8 total persons

Average # of Adults = 2.5, on par with previous study.

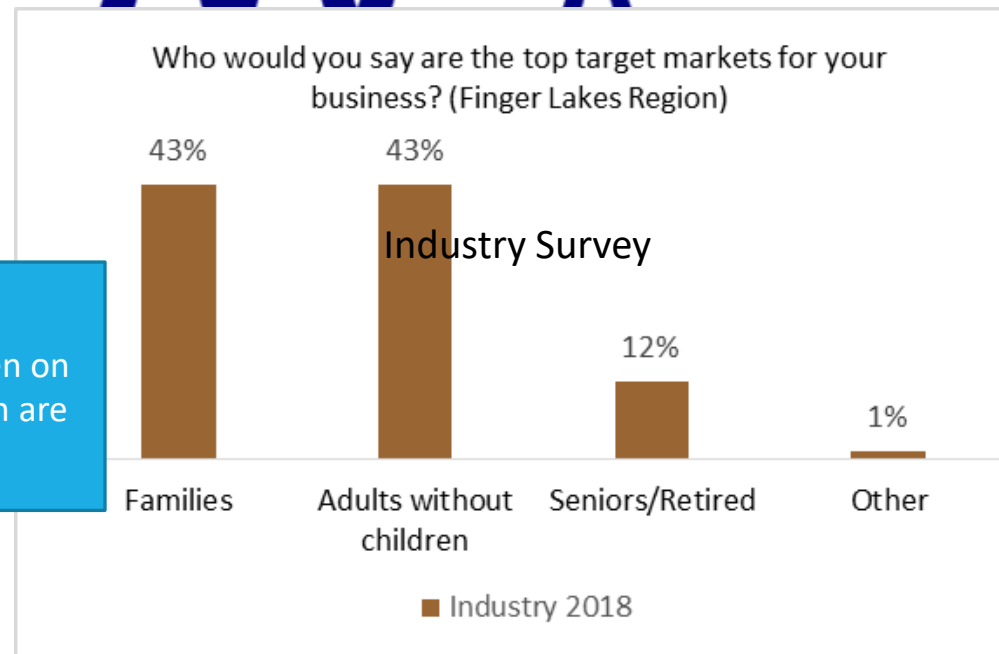
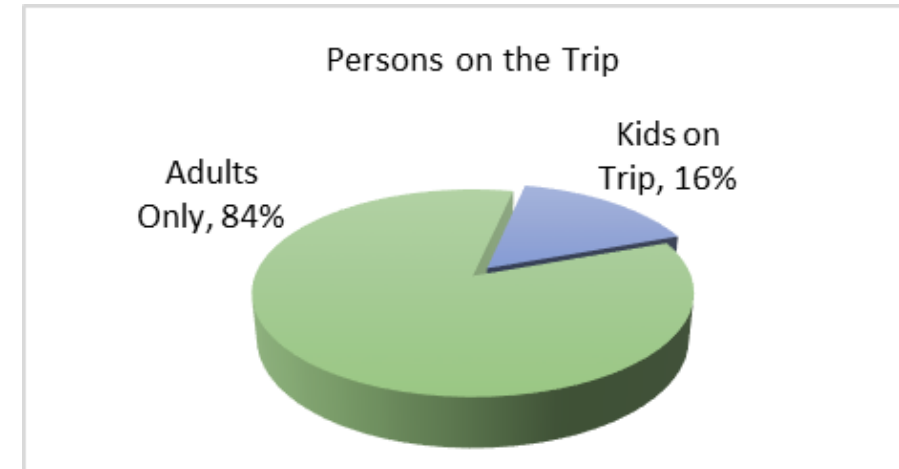
Residents of Finger Lakes were more likely to travel in larger groups – due to more children along.

By comparison, in 2018 fewer traveled with children 16%, compared to 22% in 2006*. However, the number of children on the trip increased to 2.5 in 2018 from 1.9 in 2006.

Industry Survey:

The industry is much more likely to perceive children on the trip – both Families and Adults without Children are equal markets (43% vs 16% for consumer survey).

16% were traveling with children → of those the average number of children was 2.5.



- Overnight visitors were more likely to have a child on the trip compared to day-trippers (17% vs. 11%). 20% of resident travel parties included a child.
- 48% of those with a child on the trip, had only 1 on the trip, 30% had 2 and 21% had 3 or more.

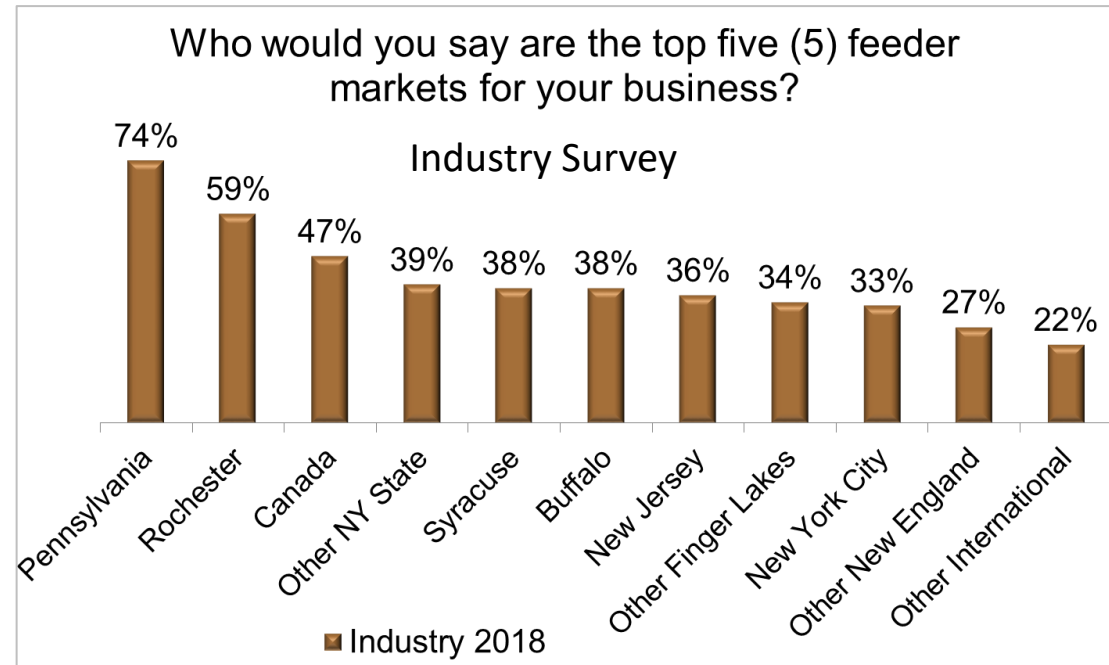
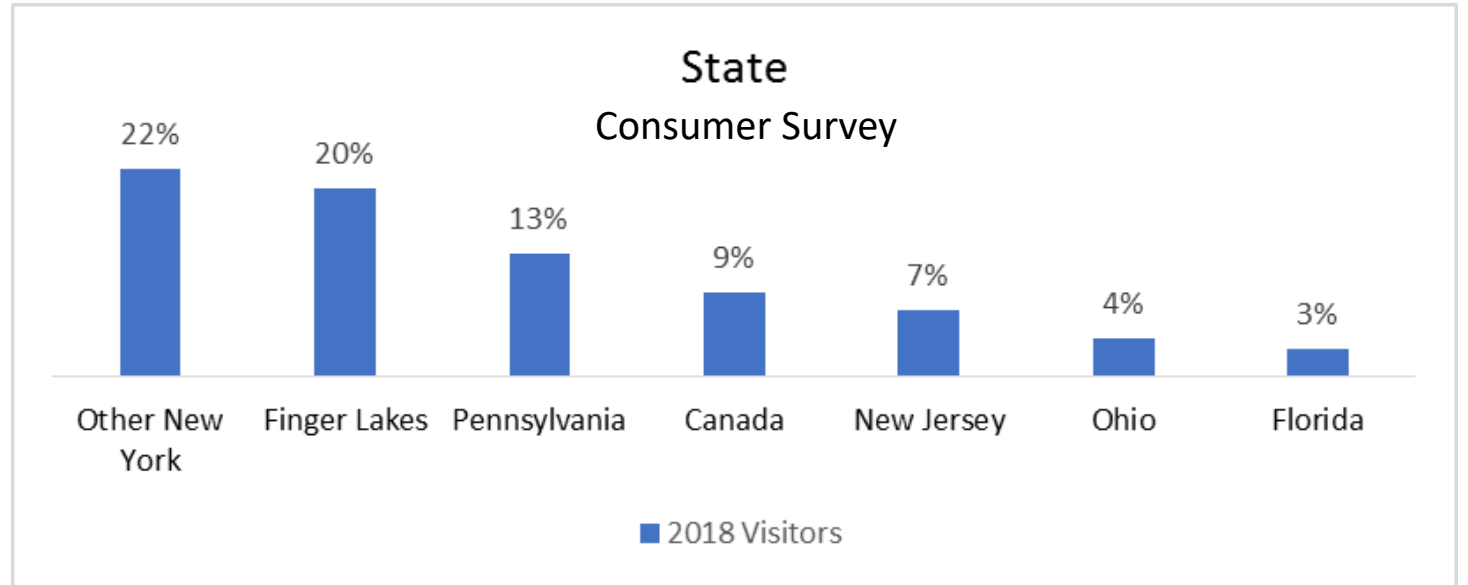
*Comparisons to 2006 study should be used with caution (see introduction).

Residence of Visitors

- 40% live in NYS.
- 20% from Finger Lakes Region and 22% of NY residents are from outside the region.
- Top three outside NYS:
 - ❖ Pennsylvania
 - ❖ Canada
 - ❖ New Jersey

Industry Perception

The rank order of feeder markets is different from the industry's perception – with higher importance given to Pennsylvania and less given to Other NY State.



Ad Campaigns

- For the remainder of this report, smaller campaigns are grouped together to ensure a stable sample size.
- Campaigns include:
 - General Interest
 - Vacation Fun
 - Winemakers
 - All Others

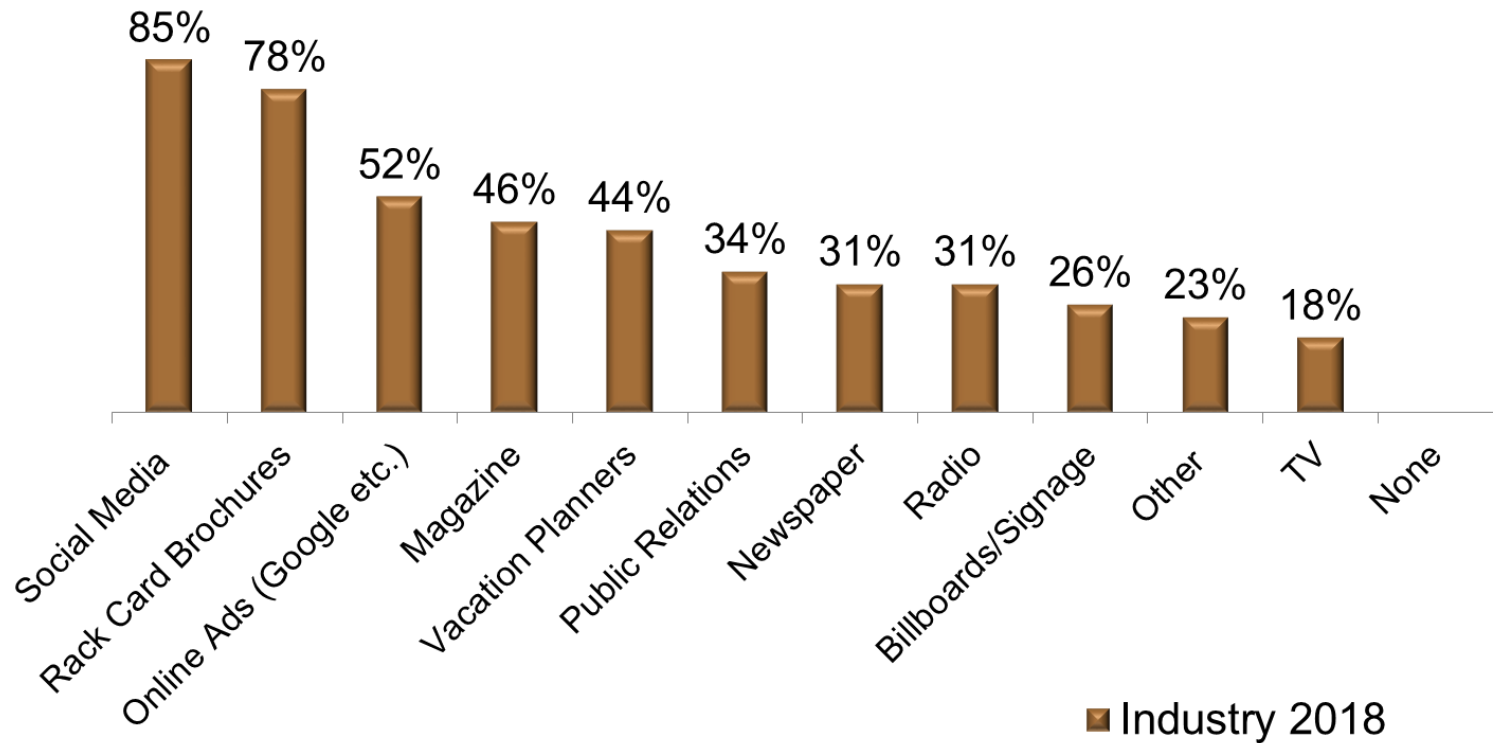
Inquirers Grouped into Eight Ad Campaigns

Ad Campaigns	FLTA Inquirers
GENERAL INTEREST	63.4%
WINEMAKERS	10.1%
VACATION FUN	9.7%
PAST YEARS	5.0%
TIPPING POINT	4.7%
OPRAH	2.8%
AAA	2.4%
NEW YORK BEST	1.9%

Industry Marketing

- When the Industry was asked where they spent or placed most of their advertising or promotional efforts, the top responses were:
 - Social Media and Rack Card Brochures.

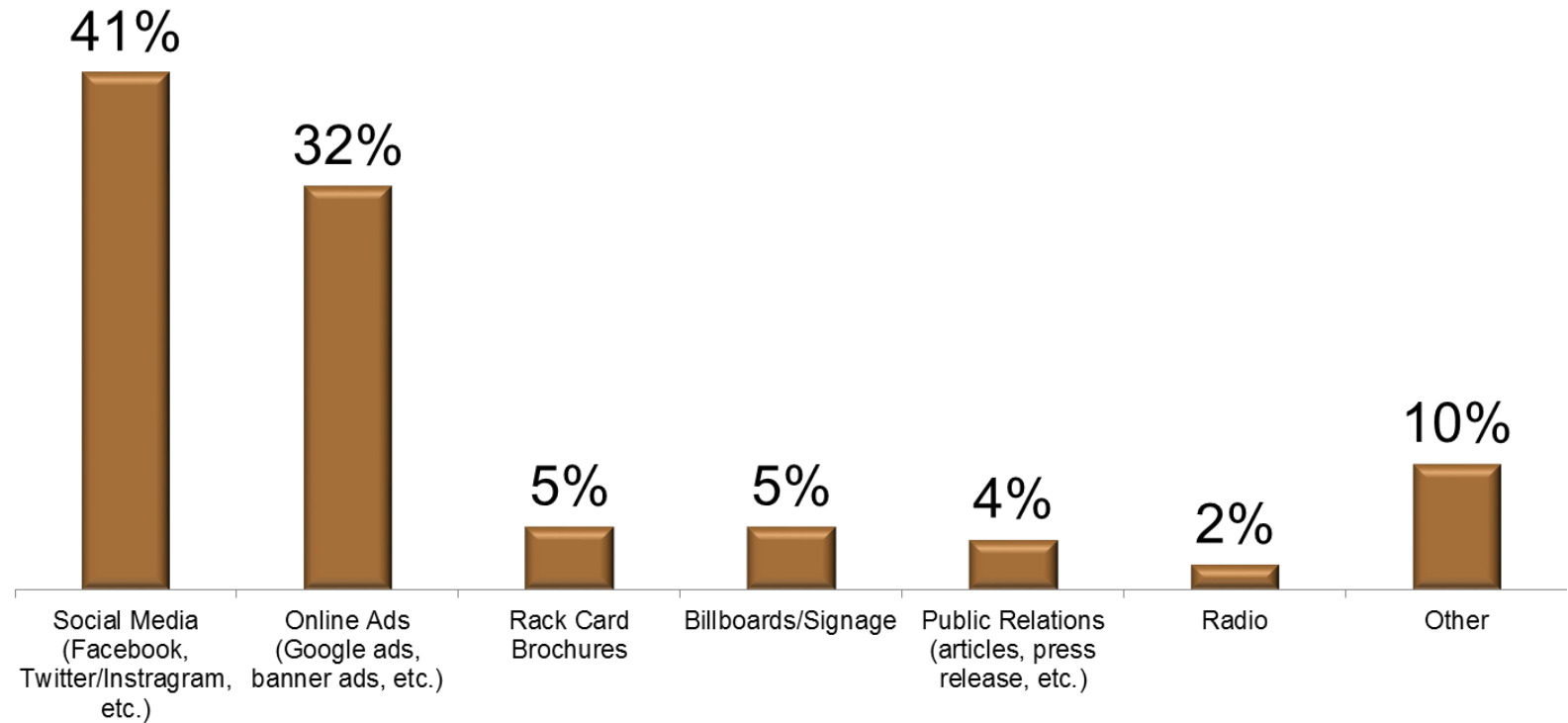
In the past year, where have you spent or placed most of your advertising or promotional efforts?



Industry Marketing

- Social Media is also considered the most effective, according to suppliers in the Finger Lakes Region.
- Rack cards, although very much used, are not often seen as the most effective tool.

Which ONE is typically the most successful?

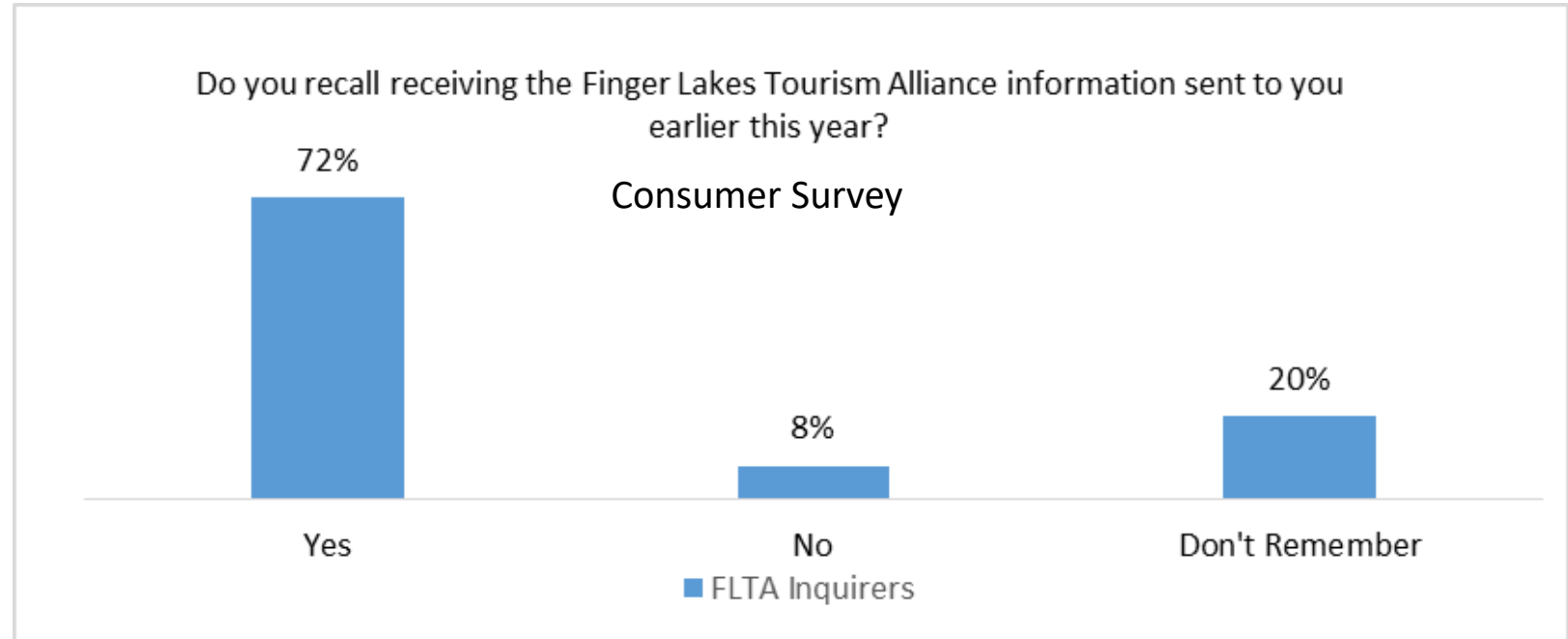


FLTA Marketing Inquirers

- 72% recall receiving the FLTA information sent to them!
- 20% could not recall and 8% could not remember.

Compared to 2006*, the level of recall for not receiving the information increased from 4% to 8%. This may be due to using older lists in the sample.

*Comparisons to 2006 study should be used with caution (see introduction).



The General Interest group was the most likely to recall receiving information (76%), while Vacation Fun had the highest level of not recalling (35%).

FLTA Marketing Inquirers

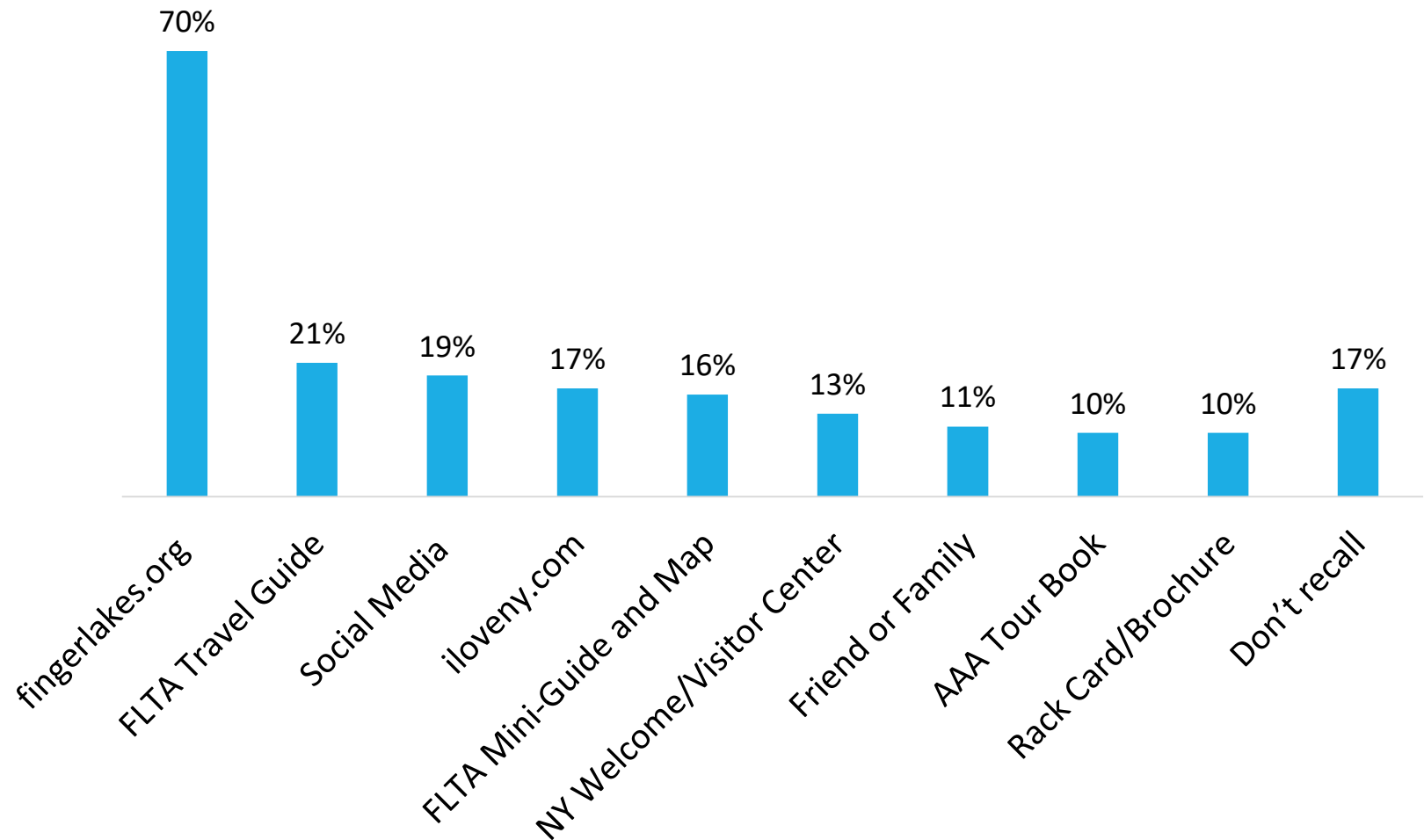
➤ When asked where they had found out about requesting a FLTA information packet, the top responses included:

1. fingerlakes.org was the overwhelming response (70%) - especially for General Interest and Winemakers (73% and 72%).
2. FLTA travel guide
3. Social media
4. Iloveny.com
5. FLTA min-guide and map

Compared to 2006*, fingerlakes.org is slightly higher (70% vs. 65%). IloveNY.com dropped from 17% and Social Media was new this year.

*Comparisons to 2006 study should be used with caution (see introduction).

Where did you find out about the information packet?



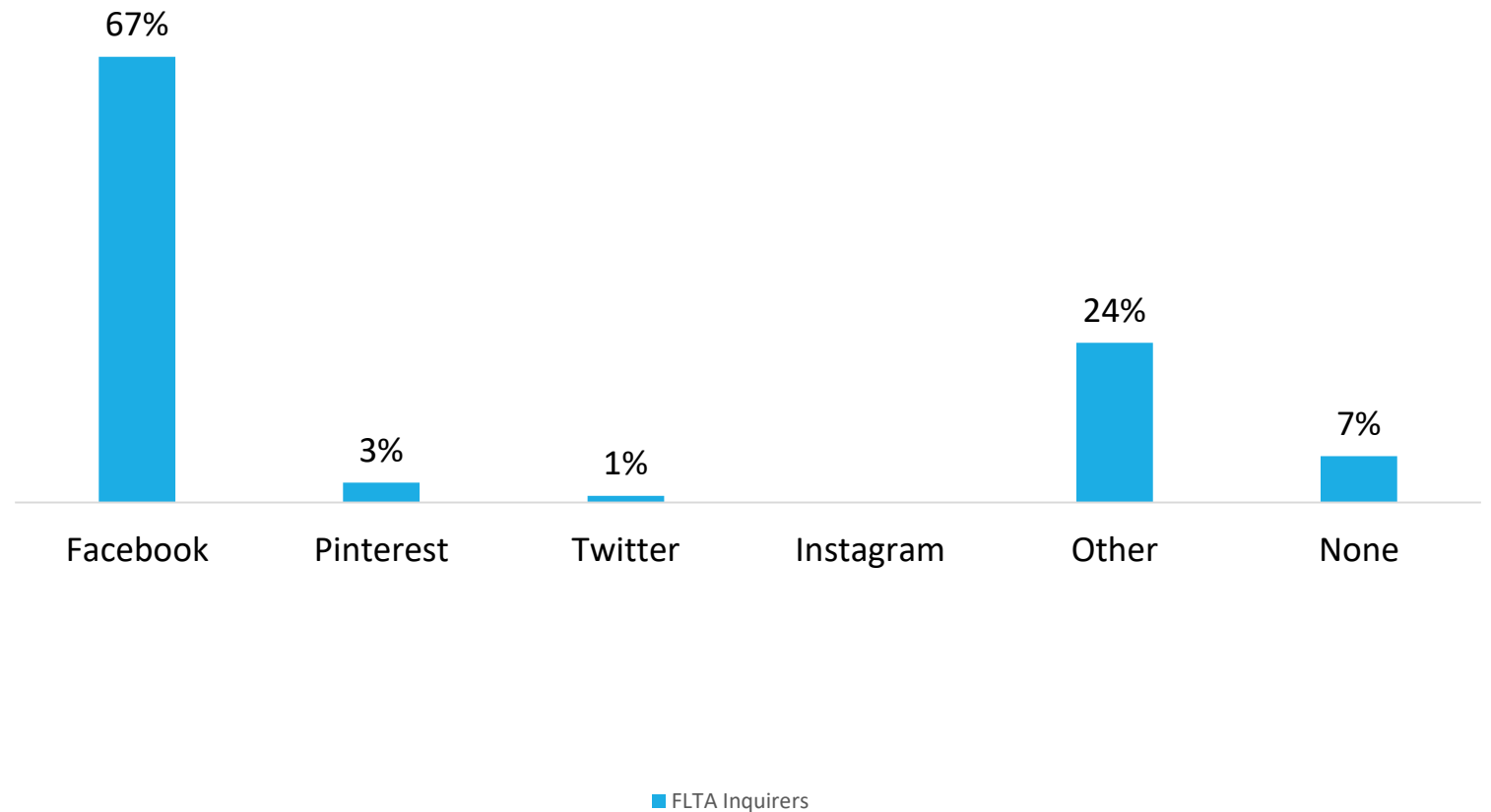
Social Media is higher among Vacation Fun (38%) and Winemakers (28%).

■ FLTA Inquirers

FLTA Information on Social Media

- Facebook is the leading social media source (67%).

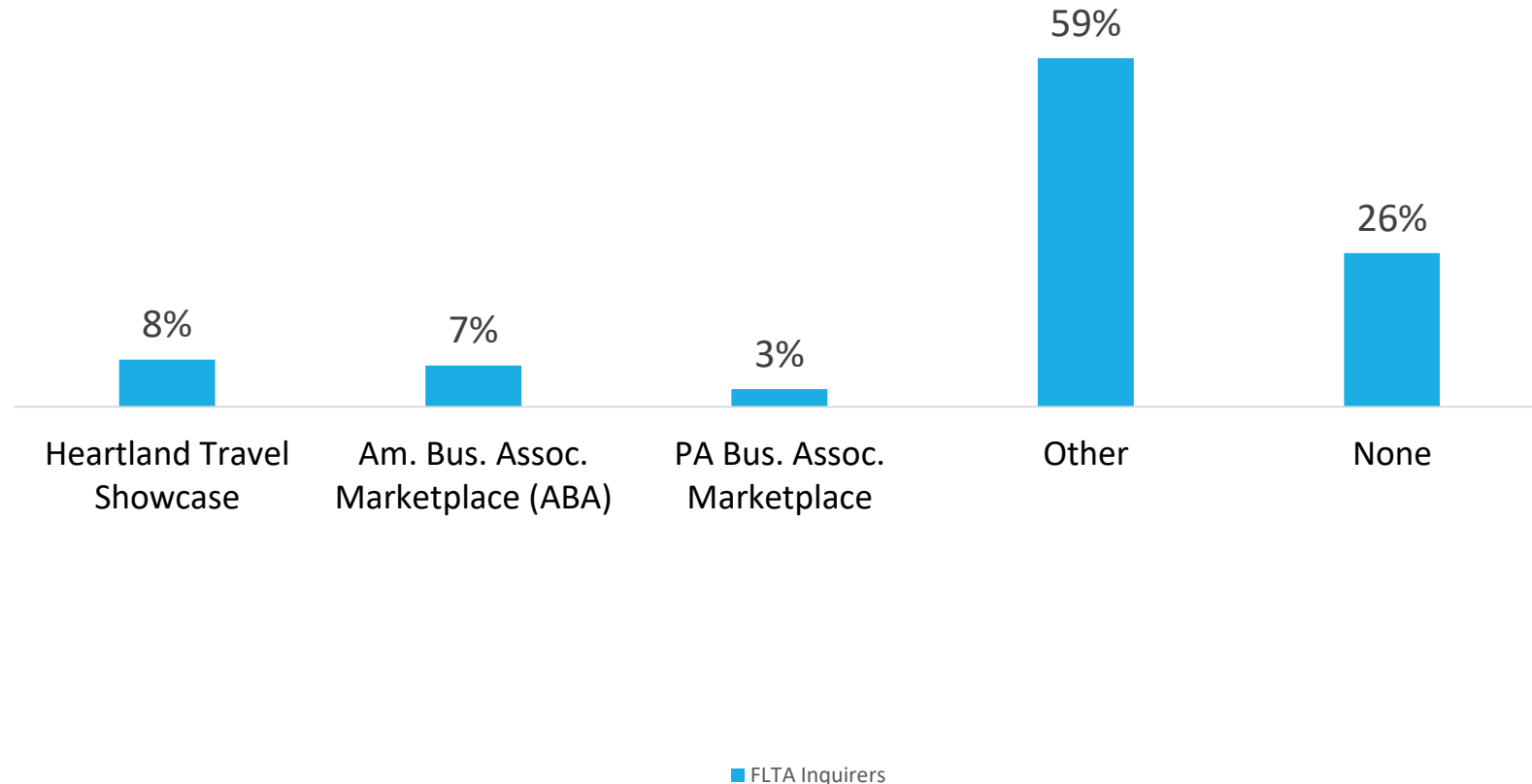
Which social media platform did you find FLTA Information?



FLTA Information at a Trade Show

- Among those who found FLTA information at a Trade Show, only a few recalled the American Business Association Marketplace and the Pennsylvania Business Association Marketplace.

At which trade show did you find FLTA information?

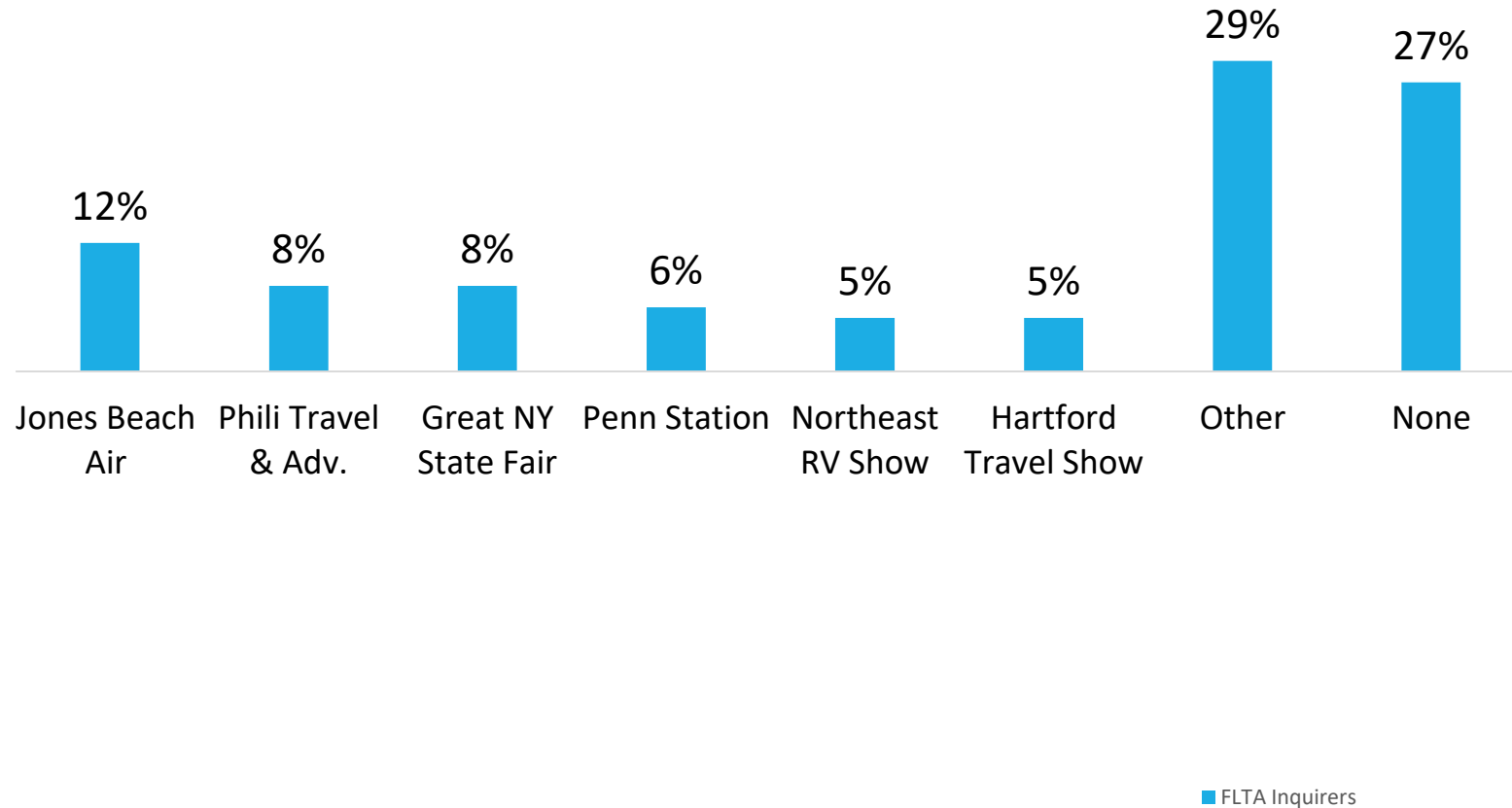


FLTA Information at a Consumer Show

➤ Among those attending Consumer Shows, the top shows included:

1. Jones Beach Air Show
2. Philadelphia Travel and Adventure Show
3. Great New York State Fair
4. Penn Station
5. Northeast RV Show
6. Hartford Travel Show

Which consumer shows did you find FLTA Information?

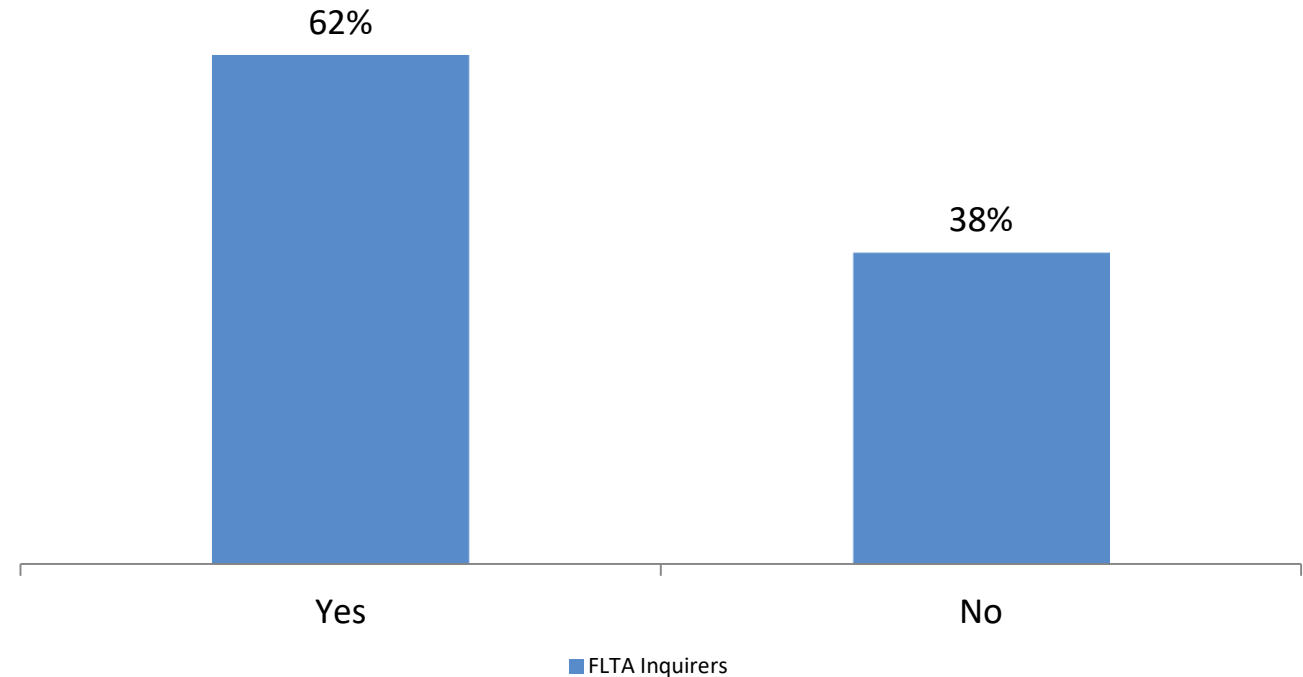


Who Converted Into Visitors?

- 62% of the Inquirers traveled to or through the Finger Lakes region since receiving the FLTA information.
- This is a very high conversion rate, which reflects the level of interest of visitors once they ask for information.
- Highest among Winemakers (75%), followed by General Interest (66%). Only half of Vacation Fun and All Others reported a trip to the Finger Lakes.
- However, even at 50%, this is a strong conversion rate compared to other clients in the industry.

*Comparisons to 2006 study should be used with caution (see introduction).

Since receiving the Finger Lakes Tourism Alliance information have you taken a trip where you traveled to or through the Finger Lakes Region area?

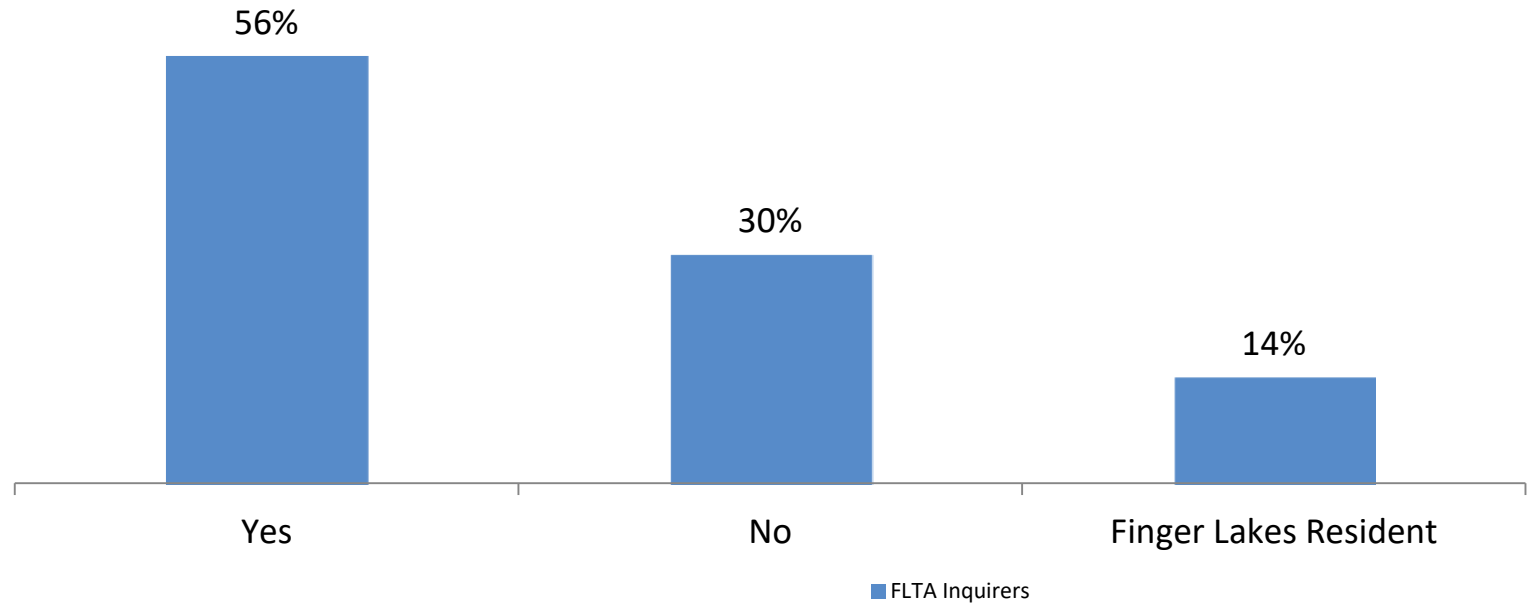


The percent indicating Yes increased 4 percentage points (62% vs. 58% in 2006*), or a 7% improvement.

Who Converted Into Visitors?

- Among all Inquirers, 56% had taken a trip to the Finger Lakes region prior to requesting the FLTA information.
- This increases to 62% among those who visited since receiving the information.

Prior to receiving the Finger Lakes Tourism Alliance information had you ever taken a trip where you traveled to or through the Finger Lakes Region area?

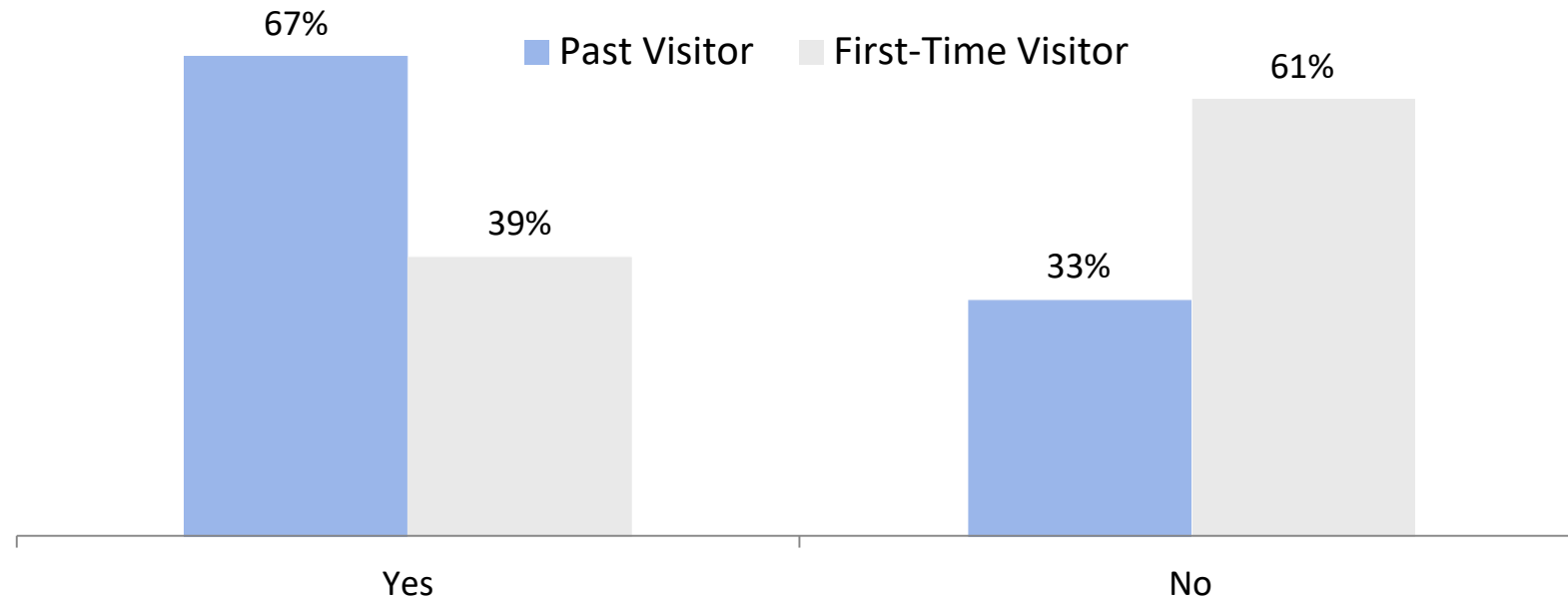


First-Time vs. Past Visitor Conversion

- Comparing Inquirers who had visited the Finger Lakes region prior to requesting information shows that 56% had previously taken a trip, 30% had not, and 14% were Finger Lakes region residents.
- Comparing their conversion shows that 67% of past visitors took a Finger Lakes trip after receiving the information, compared to just 39% for first timers.
- Compared to 2006*, this shows a higher conversion among past visitors (67% vs. 61%) and a lower conversion among the first-time visitors (39% vs. 55%).

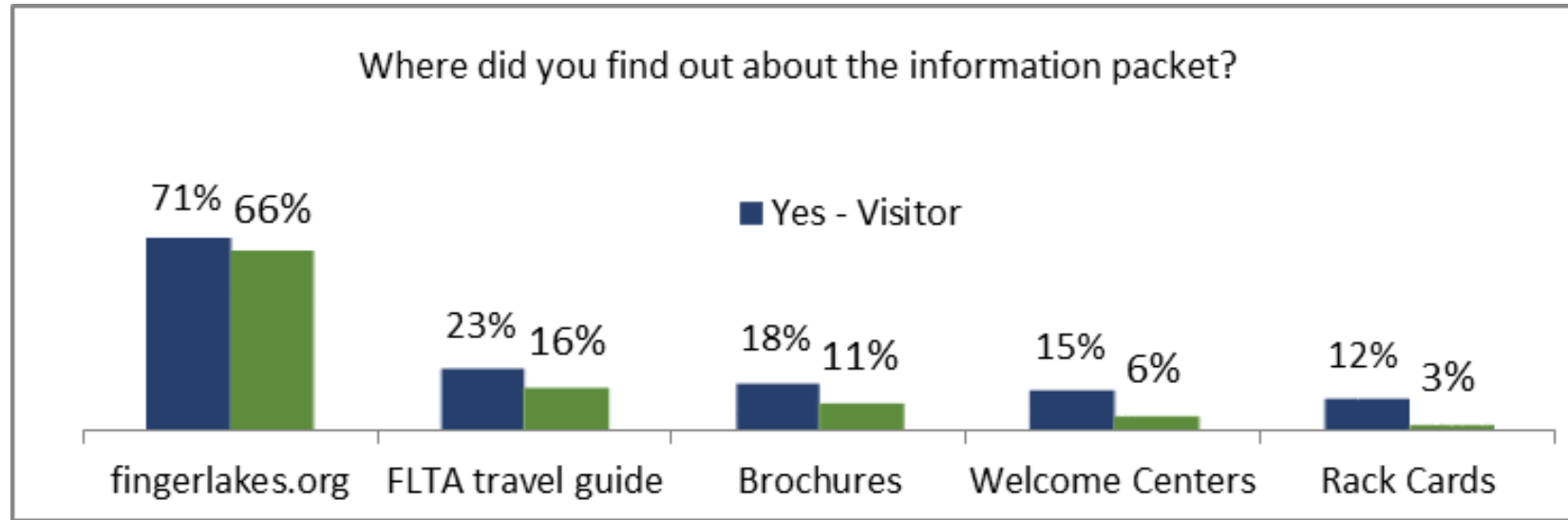
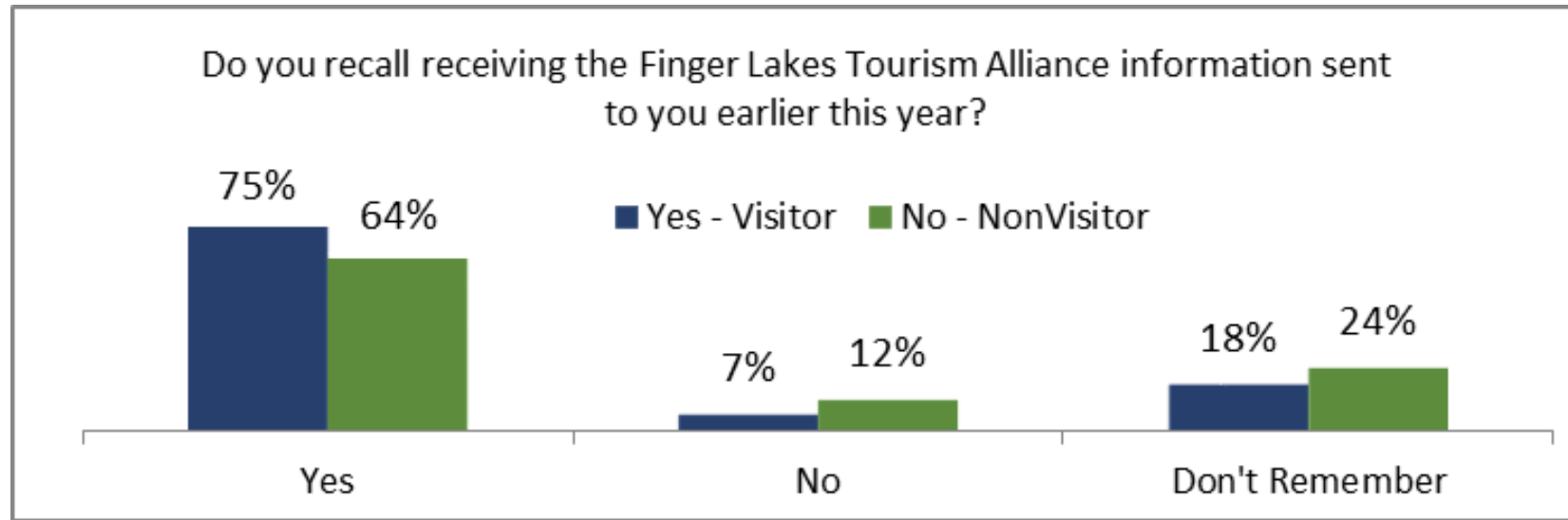
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Since receiving the Finger Lakes Tourism Alliance information have you taken a trip where you traveled to or through the Finger Lakes Region area?



Inquirer by Visitor and Non-Visitor

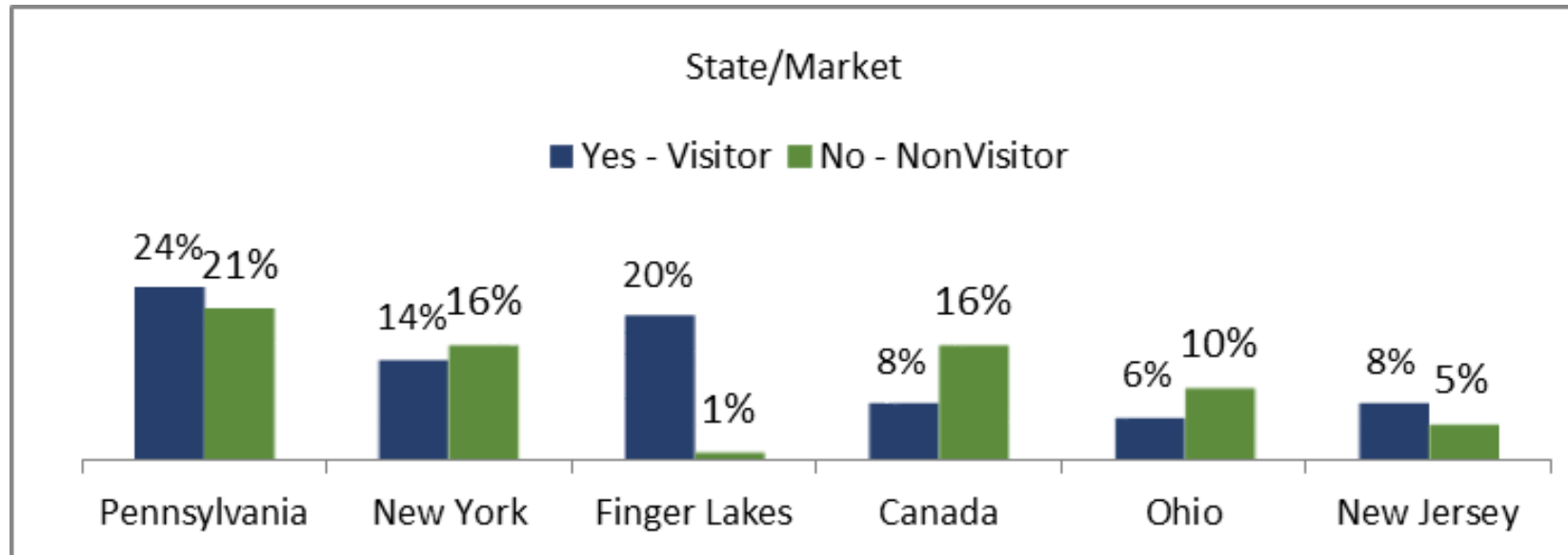
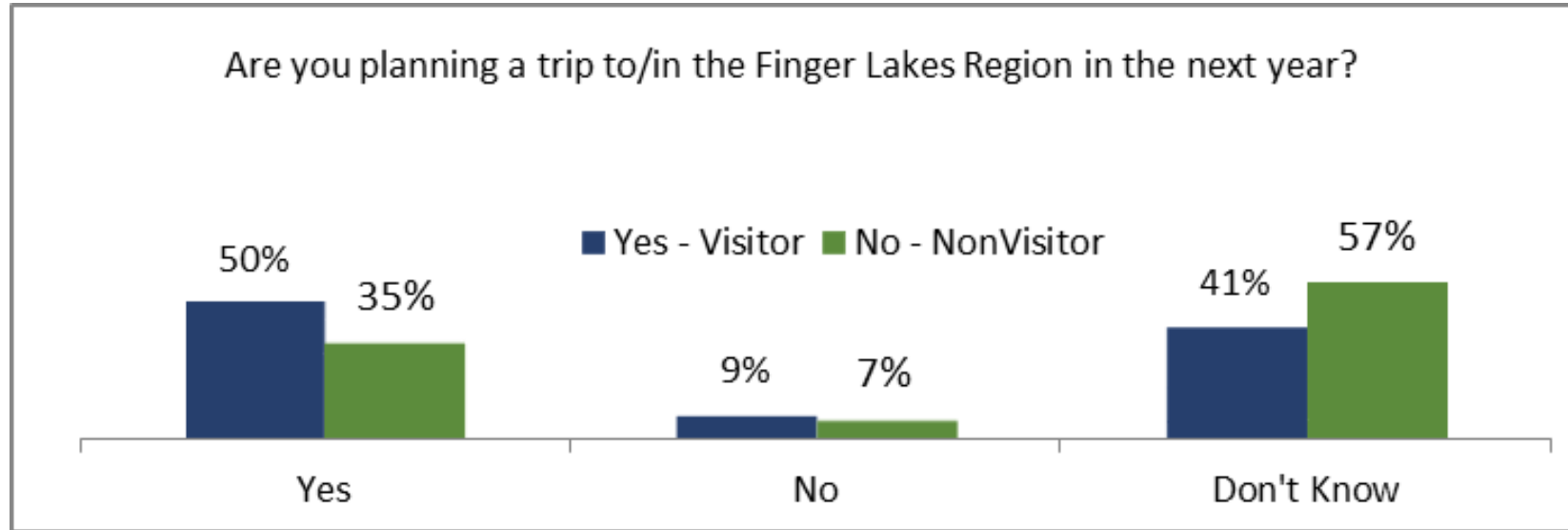
- Visitors more likely to remember receiving information.
- Primary source for both was fingerlakes.org, followed by FLTA travel guide and, obviously, welcome centers and rack cards.



Inquirer by Visitor and Non-Visitor

- Visitors are more likely to become repeat visitors – with half indicating they plan to visit.
- 35% of non-visitors in 2018 indicated they plan to come the following year.

- Non-visitors more likely to be from New York, Canada, and Ohio.
- Canada had the largest gap.



Dislikes – Information Received

➤ Most respondents had no dislikes regarding the information they received. Of those that did:

1. Advertising not user-friendly (grid like)
2. Driving distance information



Cycling Friendly

- U.S. cities and cities around the world are becoming cycling friendly for commuting, touring, and even as a delivery mechanism.
- Bicycling in New York City increased 8% between 2010 and 2011, 102% since 2007, and 289% compared to 2001 (NYC Dept. of Transportation).
- The percentage of Americans who mostly used a bicycle to get to work increased by 47% between 2000 and 2011.
- Worldwide sales of electric bicycles are predicted to reach 30 million units in 2012 and 51 million units and \$13.2 billion in revenue by 2018.
Pike Research, 2012 - "[Annual Sales of Electric Bikes will Surpass 47 Million by 2018, Forecasts Pike Research](#)"



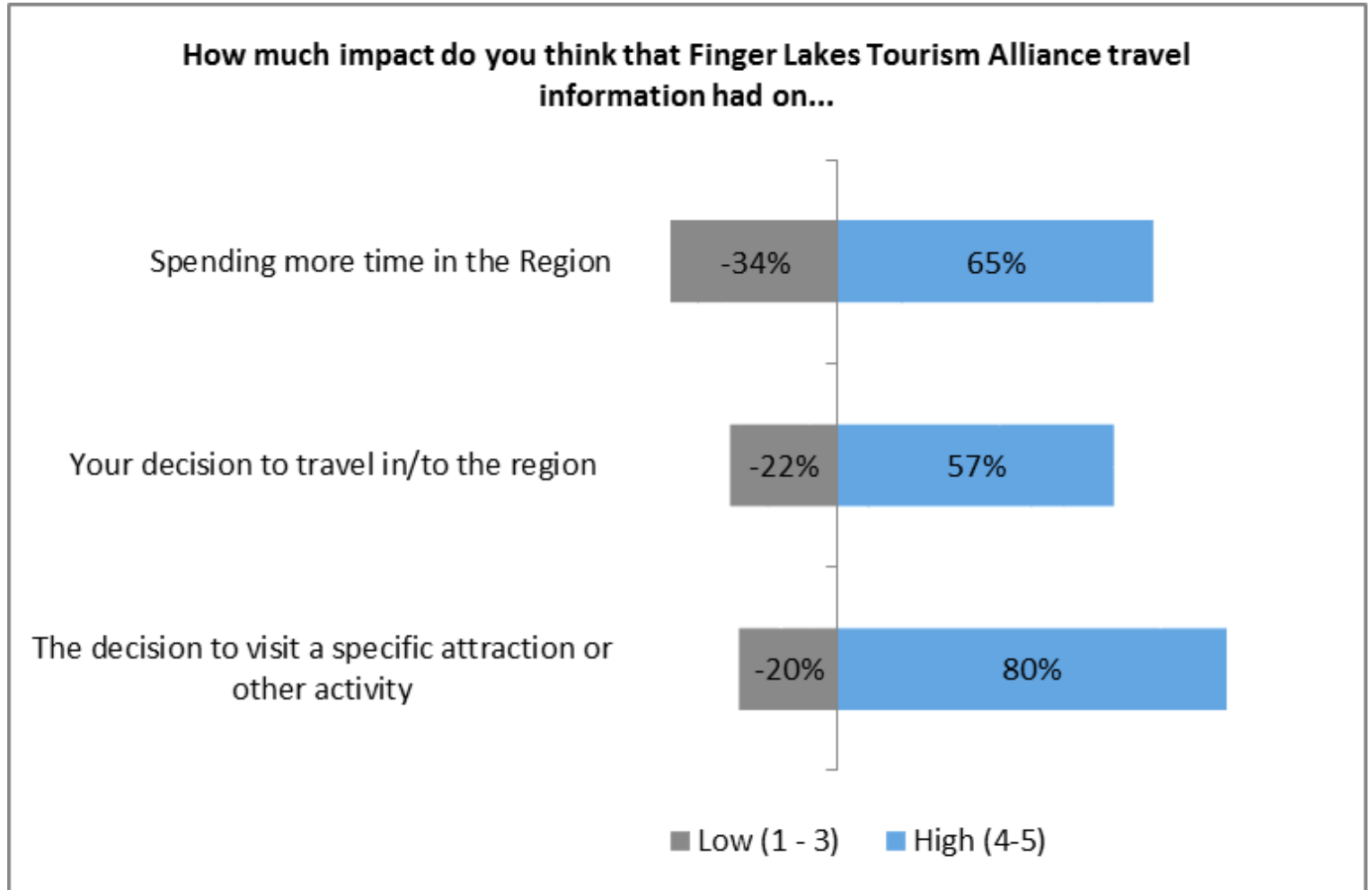
CITY	POPULATION	% OF BIKE COMMUTERS	% OF BIKE COMMUTERS IN 1990	GROWTH FROM 1990 TO 2012
DETROIT, MI	701,524	0.6%	0.1%	464.4%
CHICAGO, IL	2,714,844	1.6%	0.3%	459.7%
WASHINGTON, DC	632,323	4.1%	0.8%	445.4%
PORTLAND, OR	603,650	6.1%	1.2%	430.3%
CLEVELAND, OH	390,923	0.6%	0.1%	385.0%
BUFFALO, NY	259,386	1.6%	0.3%	361.9%
ST. LOUIS, MO	318,172	1.2%	0.3%	332.8%
BALTIMORE, MD	621,342	1.0%	0.2%	320.8%
PHILADELPHIA, PA	1,547,607	2.3%	0.6%	300.6%
SAN FRANCISCO, CA	825,863	3.8%	1.0%	292.2%

Source: Cities with the most growth in bike commuting, per the U.S. Census. Table: League of American Bicyclists (streets blog USA)



Impacts of FLTA Marketing on Visitors

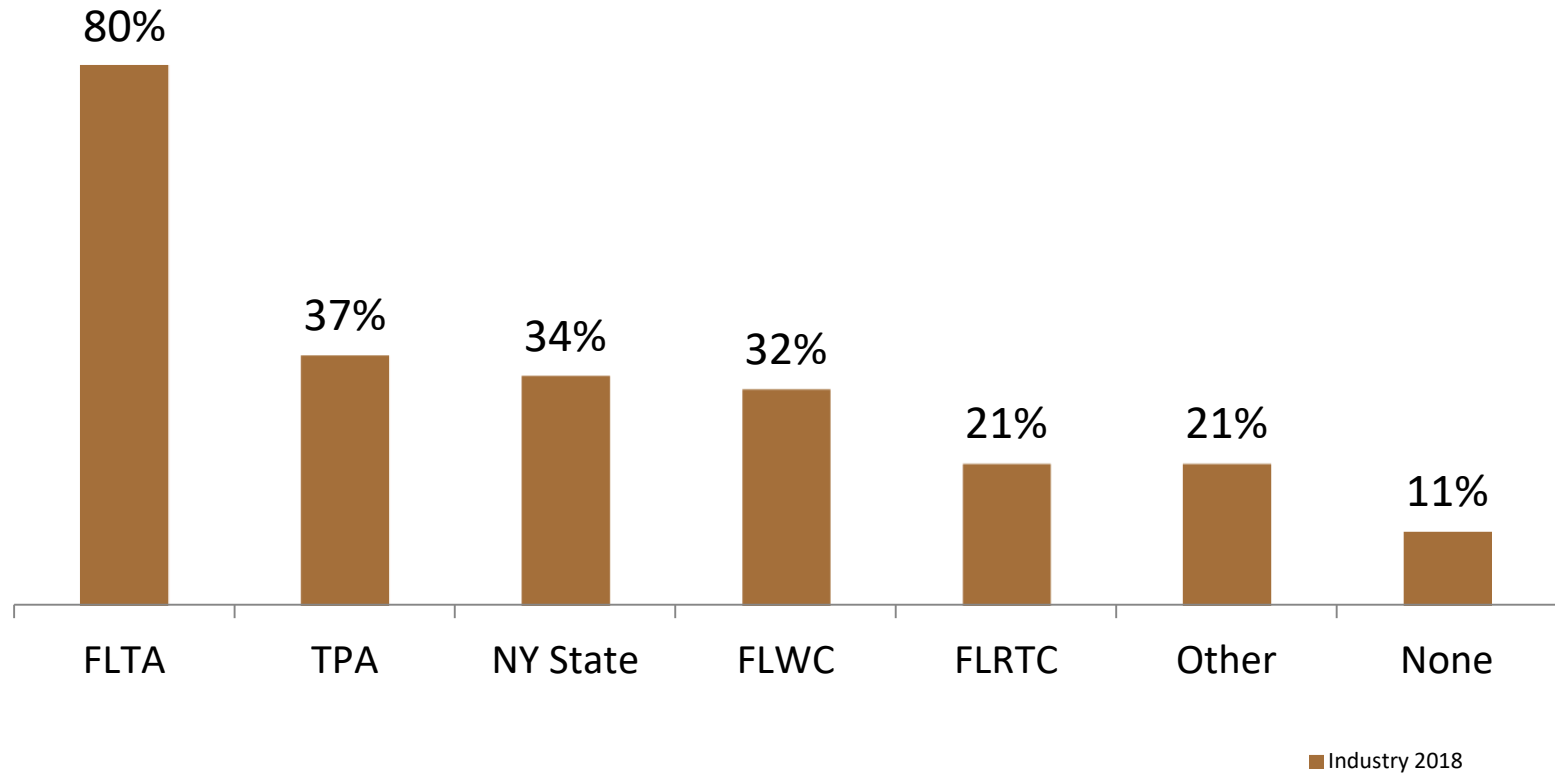
- Travel information had a significant impact on visitor's Decision to Visit a Specific Attraction or other Activity.
- 81% rated FLTA information as having an impact (50% a Great Deal of an Impact).
- Nearly 2 in 3 (66%) were also impacted on their Decision to Spend More Time in the region



How Connected is the Industry?

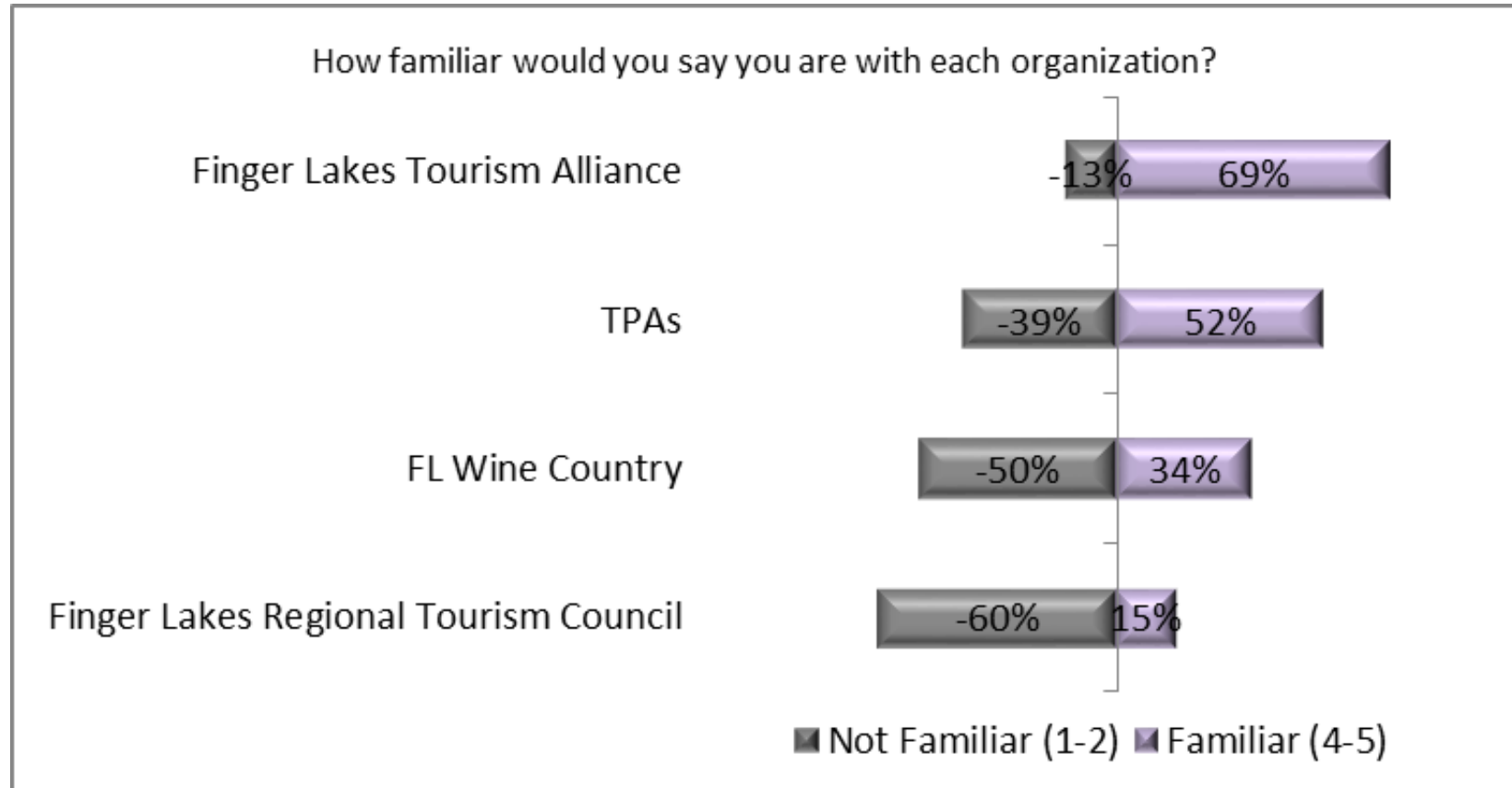
- Most of the survey respondents (80%) were partners or participated in programs of the FLTA.
- About one third were also members of a TPA, the NY State Tourism Office, and the Finger Lakes Wine Country Tourism Marketing Association.

Which of the following are you currently a member of, partner with, or you participate in some of their programs?



How Connected is the Industry?

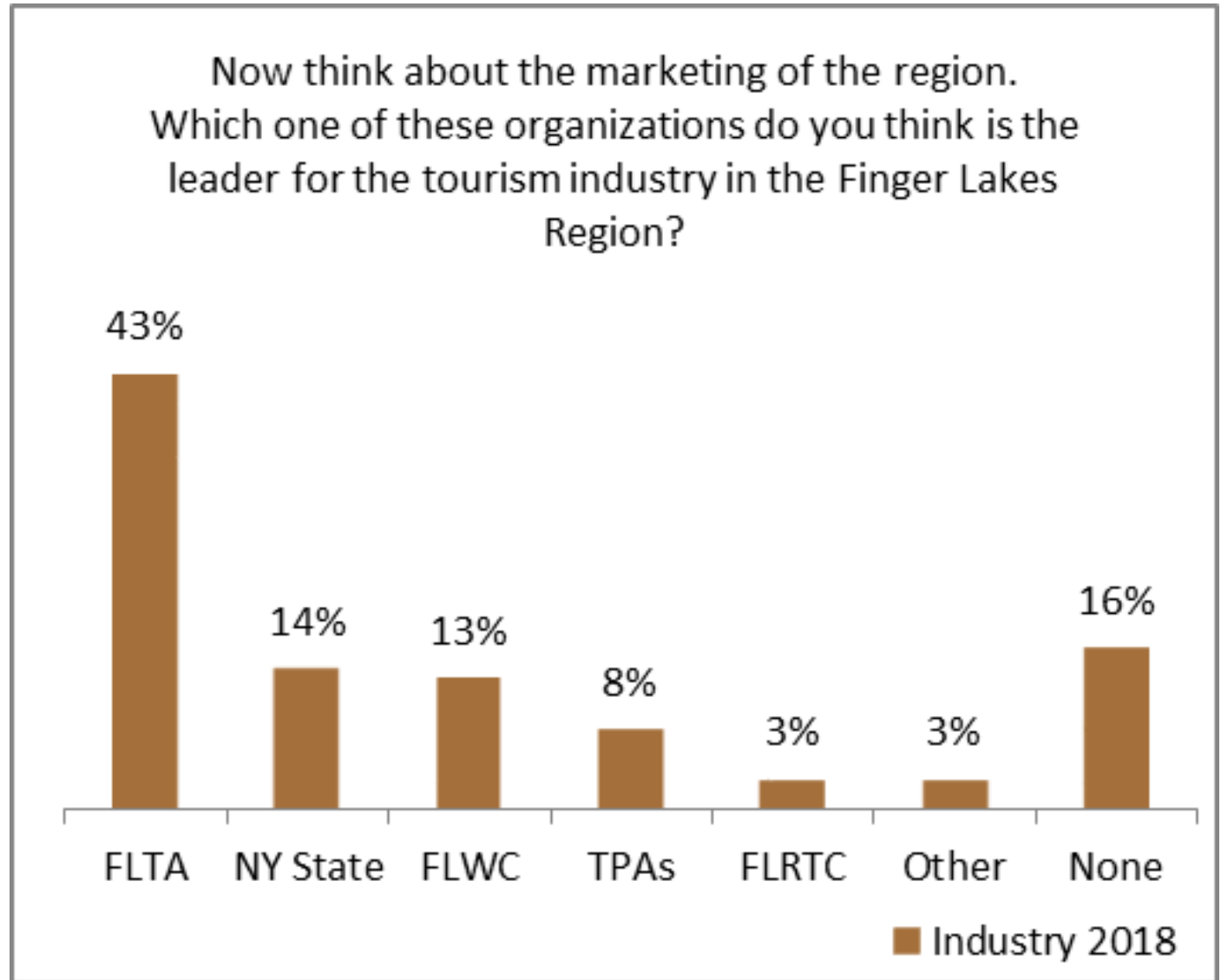
- FLTA has strong recognition.*
- Just over half have familiarity with the TPAs.
- FLWC had about one third familiarity level.
- FLRTC had the least familiarity (fairly new efforts).



*Note: Overall, the Finger Lakes Industry is quite familiar with the Finger Lakes Tourism Alliance. Keeping in mind that all the FLTA partners were emailed the survey and had a higher than average response rate. And while the data is weighted to reflect the volume by list, it is still likely that those more familiar with the Alliance were most likely to complete the survey.

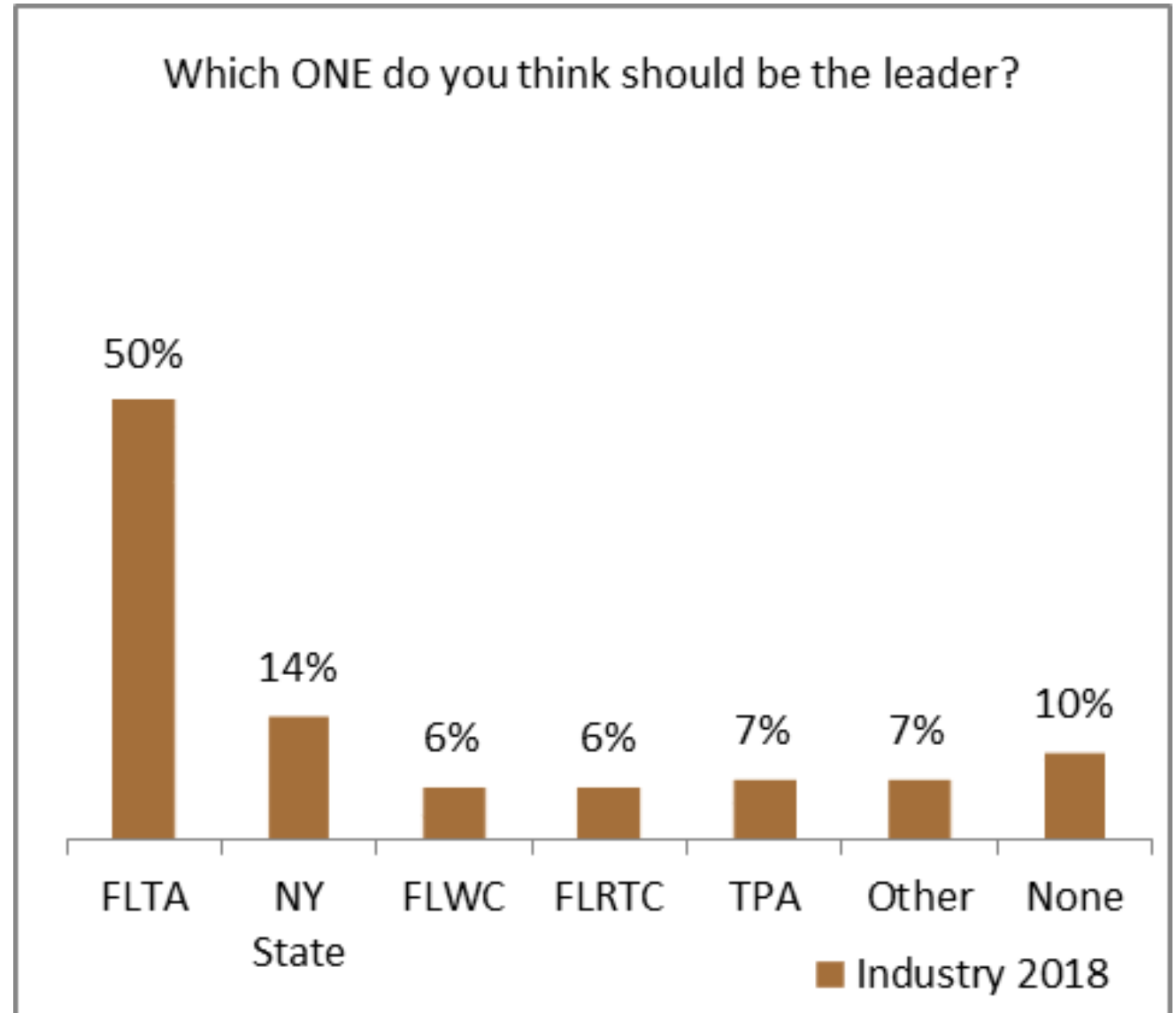
FLTA Leadership

- Over two fifths (43%) think that the FLTA is currently the leader for the tourism industry in the region.
- All of the other organizations are fairly evenly distributed with less than 15% share.
- 16% indicated there is no current leader.



FLTA Leadership

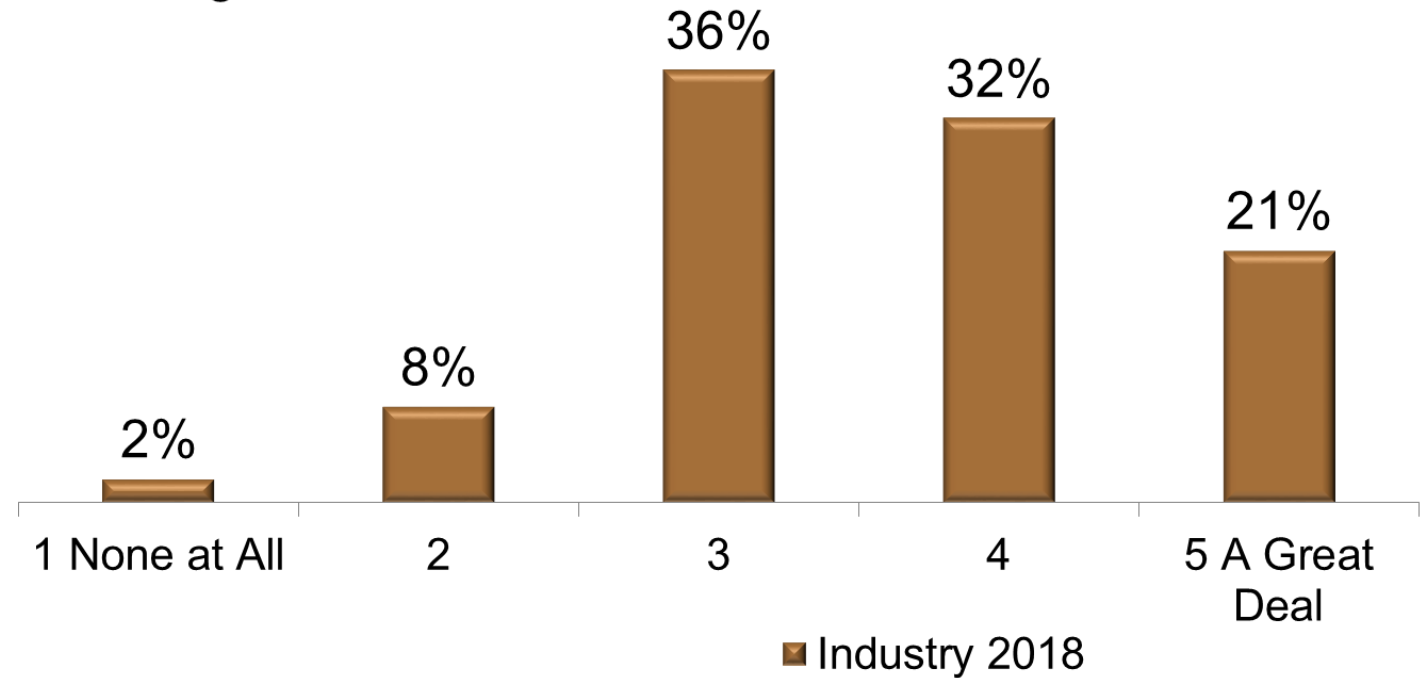
- Half of the trade indicated FLTA should be the lead for regional tourism promotion.
- FLTA is slightly stronger on “should be” at 50% vs. “is,” at 43%. This indicates support for FLTA to take more of a leadership role in the industry.



Duplication in Finger Lakes Region

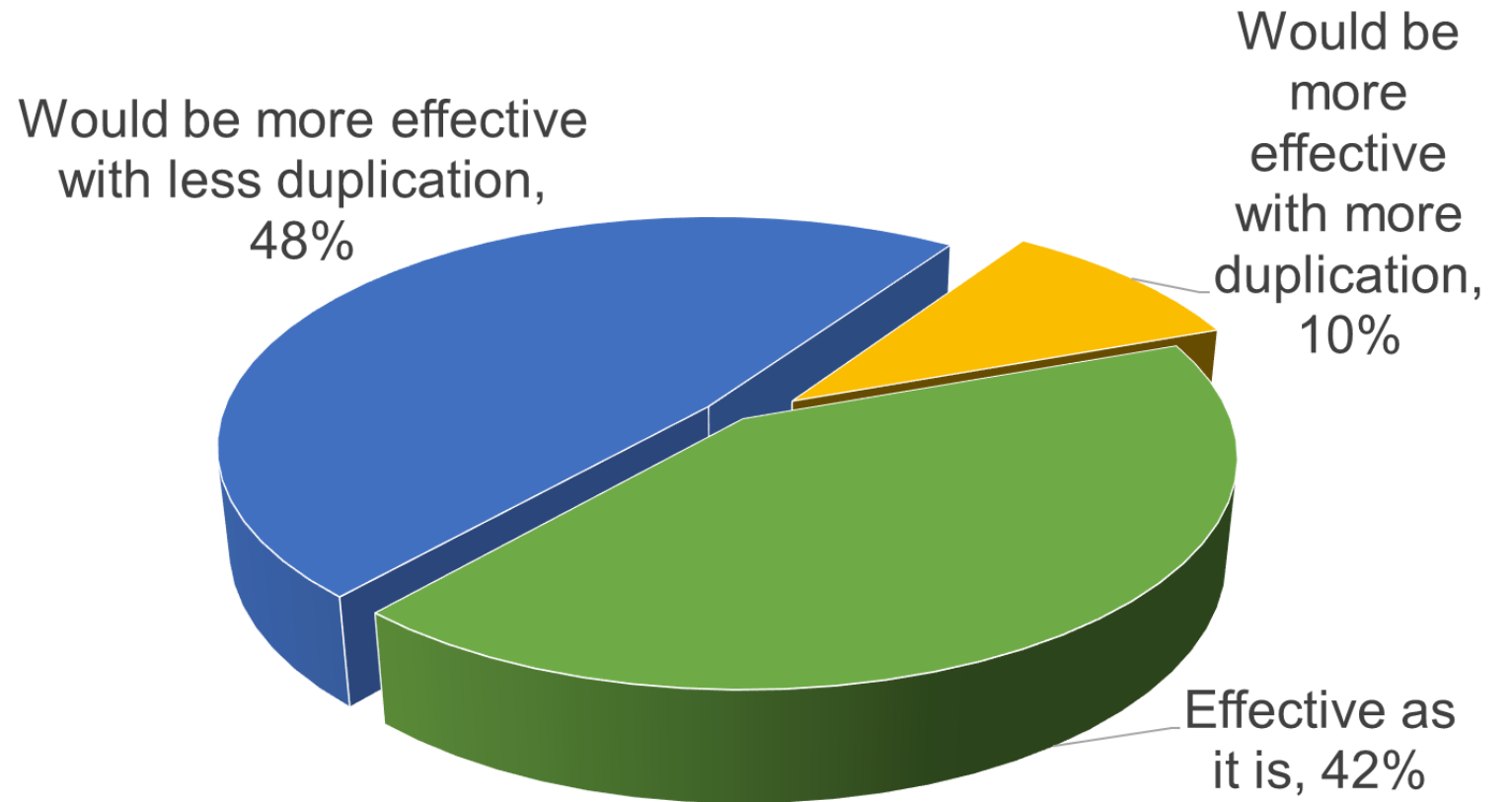
- Over one in five (21%) respondents felt there is a great deal of duplication between the organizations.
- Only 10% felt there was very little.
- Most (68%) rated it a 3 or 4, indicating some level of duplication exists.

How would you rate the amount of duplication that exists in the marketing efforts of those organizations?



Duplication in Finger Lakes Region

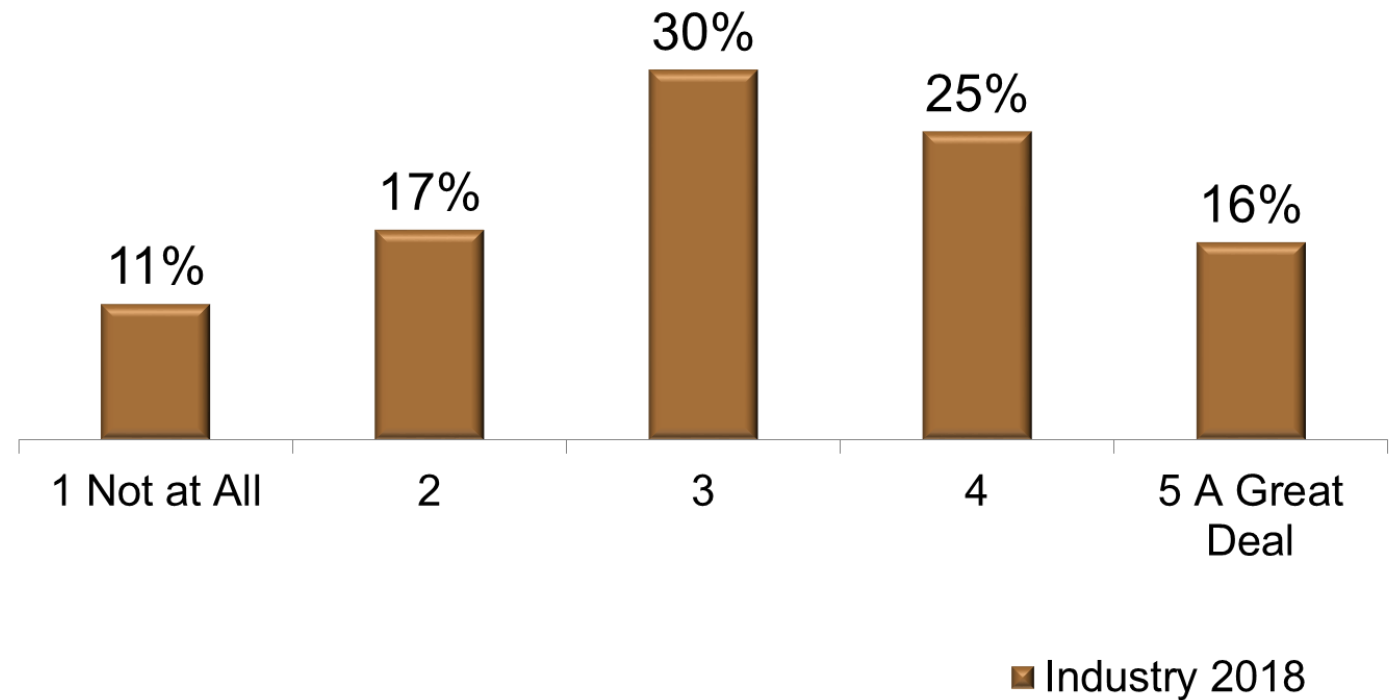
- While nearly half felt it would be more effective with less duplication, 42% felt it was effective as it is.
- The most duplication is reported to exist between FLTA and FL Wine Country Marketing Association.



Promotion Entities Work Together

- For the most part, the industry gave positive marks for how well the organizations work together.
- 41% rated it a 4 or 5. Only 28% rate the organizations poorly on working together.

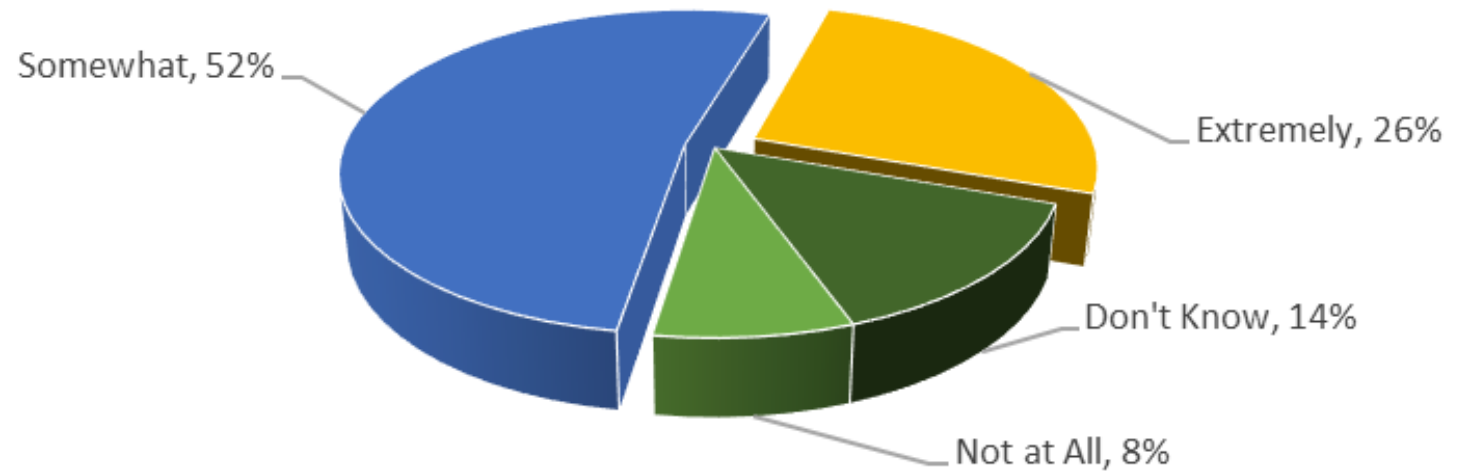
Rate how well you think these organizations work together to promote the Finger Lakes Region.



Confusion Among Promotion Entities

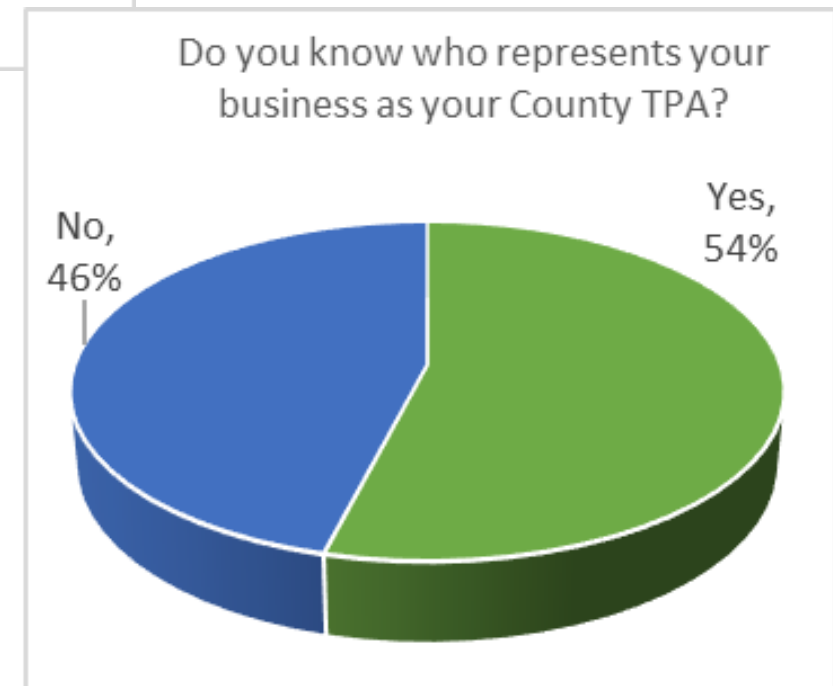
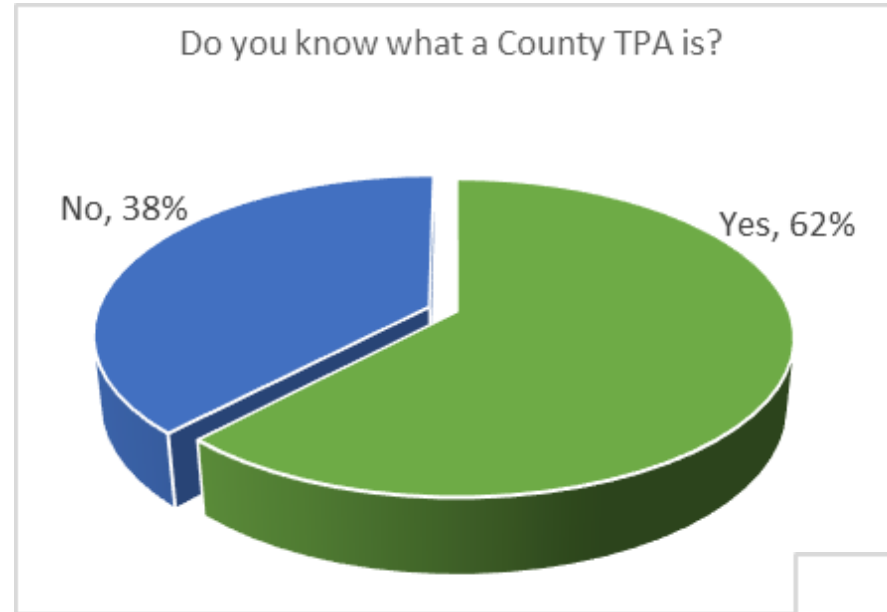
- About one quarter of the industry feels there is confusion on the promotion efforts between FLTA and the other organizations.
- The majority 52% feel there is some confusion.
- Most concerning: 26% feel confusion is extreme.

Finally, some organizations feel there is confusion among visitors between the Finger Lakes Tourism Alliance promotion efforts and the County TPA, FLWC, FLRTC and other regional marketing organizations.



TPA Awareness

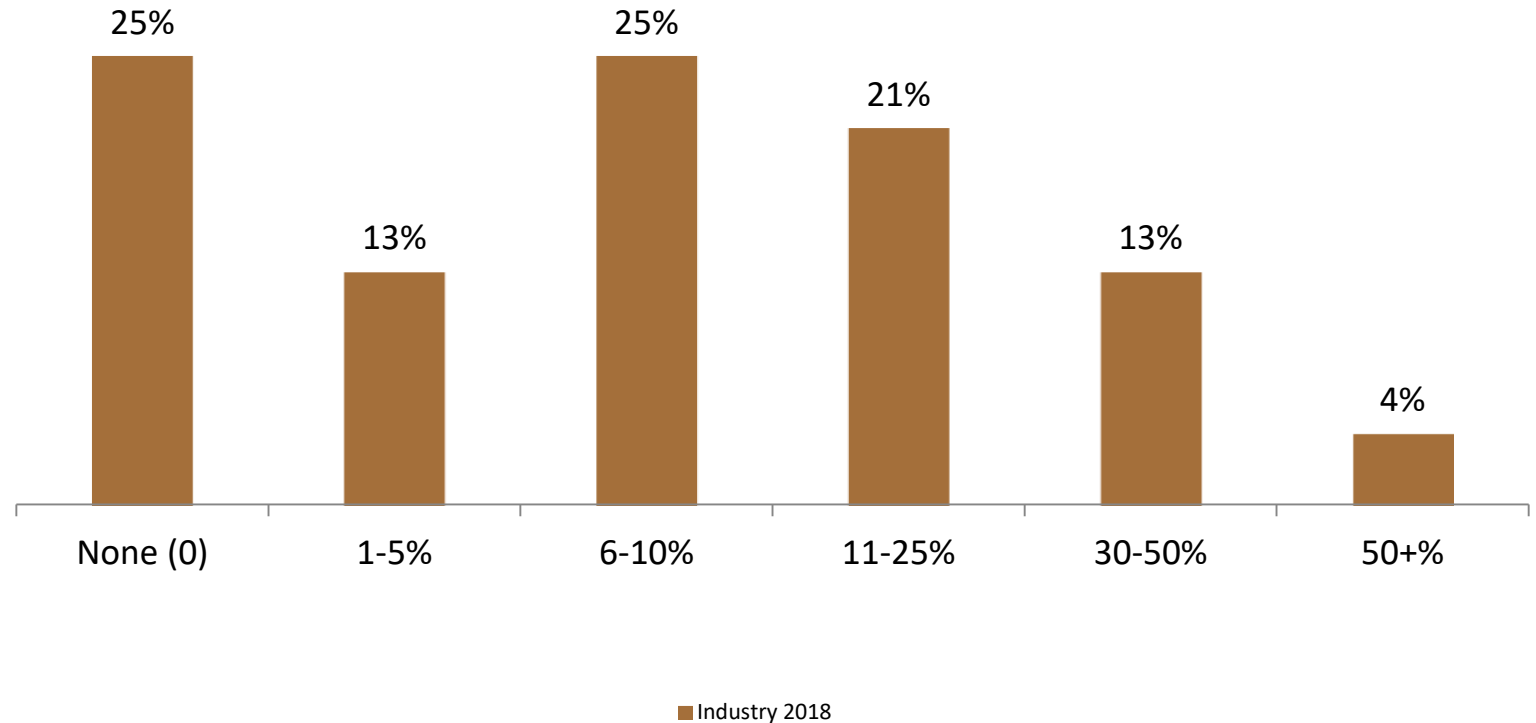
- Nearly two thirds of the industry knew what a county TPA was, but two fifths did not.
- Only half of the industry knew who represents their business as the TPA, therefore, only 46% of the industry knows who their representative is.



Support by FLTA

- When asked what percentage of their organization's growth could be attributed to FLTA marketing, the response is very favorable.
- 75% responded that at least some (1% or more) could be attributed to FLTA.
- The average was 17% of their growth.
- Nearly half (46%) responded that between 6% and 25% of their growth was due in part to FLTA marketing.

What percentage of growth in your organization would you attribute to the marketing done by those organizations?



Trade Satisfaction with FLTA Programs

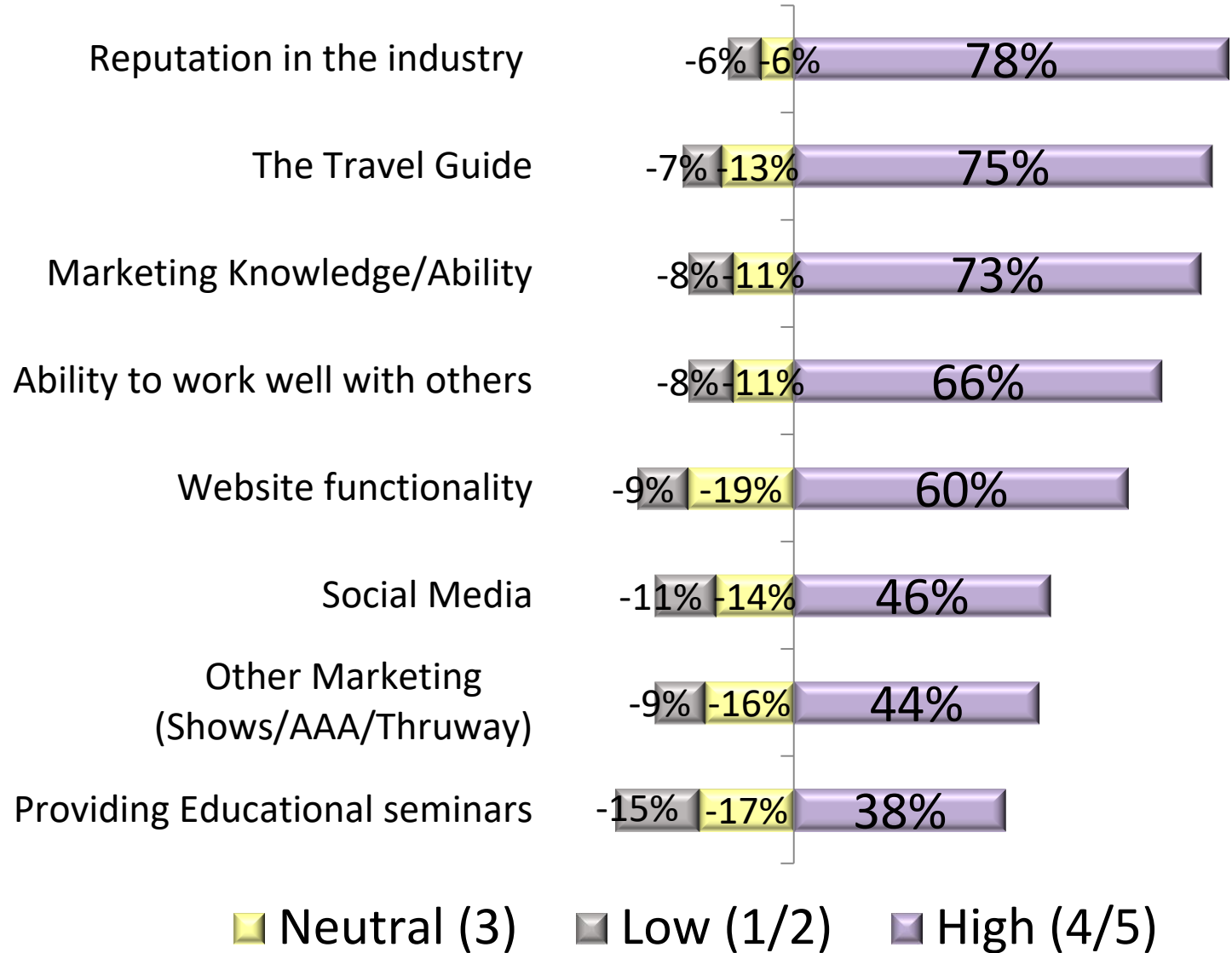
FLTA delivers on:

- Reputation in the industry
- Travel guide
- Marketing knowledge/ability

Improvements on:

- Ability to work with others
- Website functionality
- Social media
- Other marketing
- Providing educational seminars

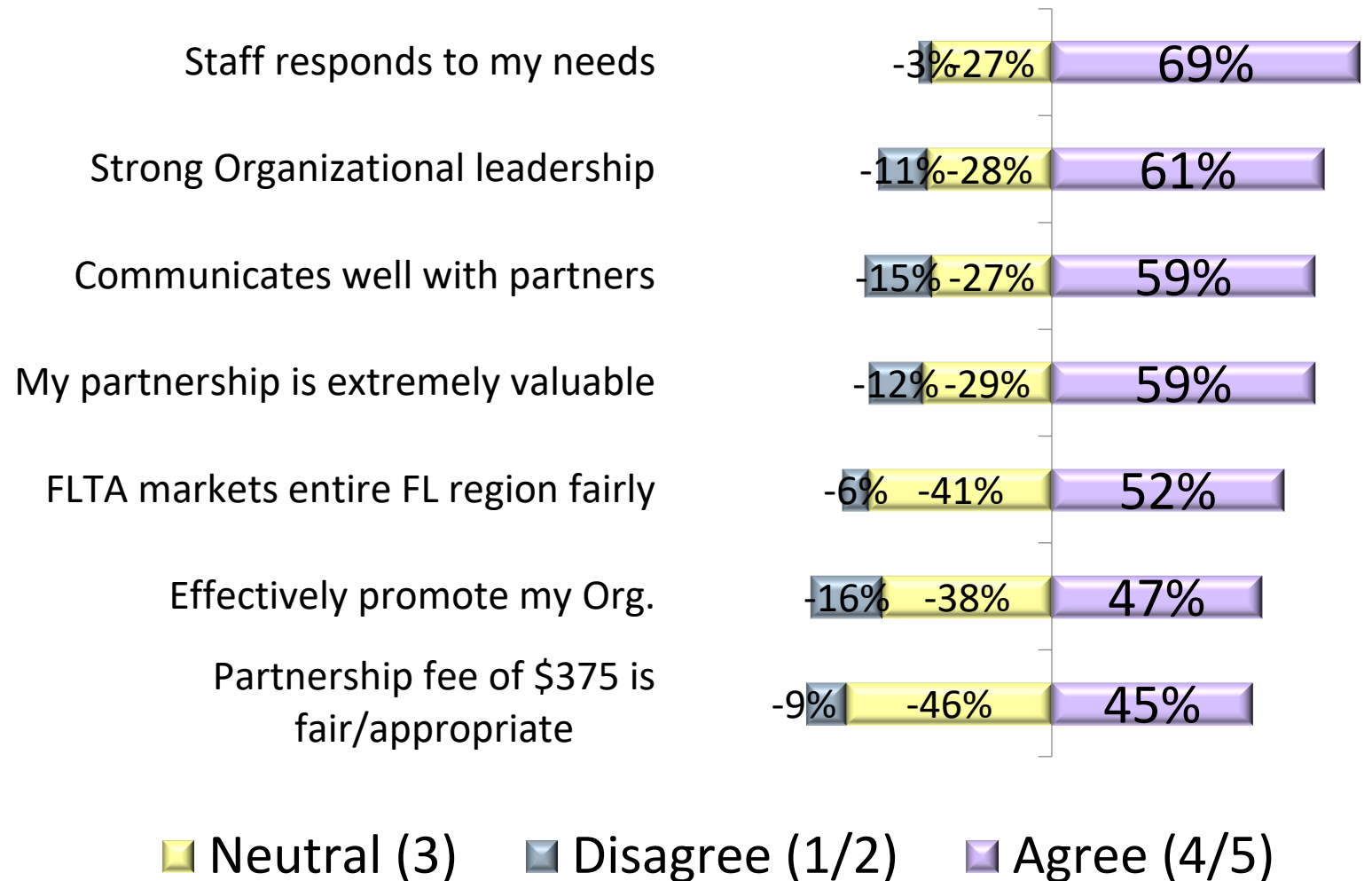
Please rate the FLTA on the following attributes, using a scale from 1 - 5, 1 = Poor, 5= Excellent



Trade Satisfaction with FLTA Partnership Benefits

- The highest satisfaction is with the staff: Responds to my needs and Organizational leadership.
- 60% agree the partnership is Extremely Valuable.
- Weak areas are Marketing the entire region, Promoting their organization, and the \$375 fee.

(FLTA Partners ONLY) How strongly do you agree or disagree with each of the following.. 1 = Completely Disagree, 5 = Completely Agree



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