

Study Objective:

The objective of this study was to conduct comprehensive tourism research and an organizational review to provide a foundation for strategic planning for the Finger Lakes Association (FLA). The FLA retained Randall Travel Marketing, Inc. of Mooresville, North Carolina to conduct this study. The findings and recommendations of the study will be utilized and considered for implementation by the Finger Lakes Association.

Study Methodology:

Research was conducted in and around the Finger Lakes region during the five-month period of August 2001 through January 2002. Many methods of data collection were used:

1. **Initial Meeting and Materials Gathering:**
Initial meetings were conducted between FLA and RTM to review questionnaires, gather input, collect materials and pertinent information.
2. **Reconnaissance Trips:**
A professional reconnaissance team visited all 14 counties in the Finger Lakes region. The dates of visitation included August 16-21 and October 3-16. The region was fully evaluated from the perspective of the tourist. The reconnaissance team's findings are documented in this report.
3. **Visitor Profile & Conversion Survey – Random Sample of Inquiries:**
2,000 4-page questionnaires were mailed out to a stratified random sample of people who had requested visitor information from FLA over the course of a one-year period. 342 surveys were returned for a 17.10% response rate and have been tabulated as part of this report.
4. **Executive Interviews**
A listing of community leaders was prepared with input from FLA and from each of the 14 counties in the region. 147 executive interviews were completed. The summary of the responses is a part of this study.
5. **Lodging Property Interviews and Fax Survey:**
A fax survey was sent to every lodging property in the Finger Lakes region (hotels, motels, bed & breakfasts, and rental units). Additionally General Managers at a randomly selected sample of lodging properties were interviewed.
6. **State, Regional and National Data:**
Research data from the State of New York as well as national and regional sources was obtained and analyzed as part of the study.
7. **Marketing Materials Evaluation:**
Marketing materials including brochures, fulfillment pieces, press kits and coverage, print advertising and placement schedules, etc., were obtained from FLA and evaluated based on research findings and the experience of the RTM team. Our analysis and recommendations are a part of this report.
8. **Report and Recommendations:**
Based on research findings a comprehensive report was written and presented to the Finger Lakes Association.

Summary of Research Findings

1. *Visitors give the Finger Lakes region an overall rating of A- (4.30 on a 1-5 scale where 1=poor, 3=average, and 5=excellent).*
2. *What visitors like most about the Finger Lakes region includes:*
 - *Beautiful scenery/nature*
 - *Charming villages and towns*
 - *Wineries*
 - *Specific attractions**The top dislikes for visitors include:*
 - *Weather*
 - *Traffic/ wayfinding*
3. *Point of origin for most visitors (63.82%) is either within the Finger Lakes region, or within a 4-5 hour drive. This primarily includes New York, Pennsylvania, New Jersey, and Ohio.*
4. *The majority of visitors (61.95%) had visited the Finger Lakes previously.*
5. *The conversion rate for visitors who had previously visited the Finger Lakes was 50.82%. The conversion rate for new visitors was 23.01%.*
6. *The average length of stay was 2.98 nights. 24.62% of visitors categorize their trip as a day trip. 32.31% reported a weekend getaway (1-3 nights). 15.38% reported a weekday getaway (1-3 nights). 27.69% reported a vacation (4+ days).*
7. *The primary trip purposes for visitors include visiting wineries, general relaxation, visiting friends and relatives, visiting a specific attraction or event, or overnighing as part of a longer trip.*
8. *90.91% of visitors travel to the Finger Lakes by automobile.*
9. *Hotels and motels were the most likely choice of lodging (59.66%), followed by Bed & Breakfast (13.45%), and friends and relatives (12.61%).*
10. *The typical travel party consists primarily of adults (75.35%) Those traveling with children represented 24.65% of the respondents.*
11. *The average age of visitors to the Finger Lakes is 51.72 years. They are educated with the majority having either some college or a college degree. The trip planner tends to be the female head of household. The income level is in the middle range.*
12. *The primary sources for trip planning information include:*
 - *Good Housekeeping*
 - *AAA Tour Book*
 - *New York State Travel Guide*
 - *Newspaper Ads*
 - *Parade Magazine*
 - *Finger Lakes Travel Guide*
 - *Better Homes & Gardens*

Executive Summary

- 13. *The activities that most visitors enjoy while in the Finger Lakes include:*
 - *Shopping (31.29%)*
 - *Driving/sightseeing (28.36%)*
 - *Visit a winery (25.15%)*
 - *Walking downtown (23.98%)*
 - *Visiting a state park (21.05%)*
- 14. *The priority unmet needs for visitors to the Finger Lakes include:*
 - *More fine dining restaurants (34.807%)*
 - *Overnight canal / lake barge cruises (28.36%)*
 - *September wine festival (27.19%)*
 - *Lakefront spa / resort (26.61%)*
- 15. *Visitors to the Finger Lakes create strong economic impact for the region. This is reflected in the average trip expenditures reported by each segment.*

Average Daily Trip Expenditures

<u>Category</u>	<u>Amount</u>	<u>% of whole</u>
1. Lodging	\$81.22	31.57%
2. Food/Meals	\$45.56	17.71%
3. Shopping (other than wineries)	\$43.74	17.00%
4. Transportation/Fuel	\$30.11	11.70%
5. Shopping at wineries	\$30.02	11.67%
6. Attractions/Amusements	\$26.59	10.34%
Average Daily Expense	\$257.27	100.00%

- 16. *April to November are the most heavily visited months of the year.*
- 17. *Visitors enjoy the Finger Lakes and plan to visit again. 71.81% report they will return.*

Strategic Direction

Research: Finger Lakes region as a destination

Visitors think highly of the Finger Lakes region and perceive it as being a naturally scenic, relaxing area with a good number of charming towns and wineries. In this study, we have clearly “captured the voice of the customer” and understand their perceptions of the strengths and weaknesses of the region and the new tourism development that they would most like to see.

Investigation: Finger Lakes Association (FLA) as a destination marketing organization

In this study RTM investigated this organization in-depth. RTM conducted 147 executive interviews with tourism leaders across the region. We interviewed the staff of FLA. We interviewed the Tourism Promotion Agencies (TPAs) and the leaders of the 14 counties that support the organization. We talked with state and national tourism leaders.

Executive Summary

We examined the organization's history, funding, budgets, staff structure and offices, marketing efforts, programs of work, and operating principles. We reviewed the growth (or non-growth) of tourism in each of the 14 counties. We reviewed FLA's board structure and its committees.

Conclusion: FLA needs sweeping changes in both its organization and its marketing efforts to fulfill its mission of driving visitation to the Finger Lakes and increasing economic impact.

RTM's specific recommendations include:

Organizational Recommendations

1. *Change the name of the Finger Lakes Association*

FLA needs to change its name to accomplish two things:

- A. Accurately reflect its mission in recruiting visitors
- B. Signal to the industry that major changes are taking place with FLA

The name that RTM recommends is:

Visit Finger Lakes
www.visitfingerlakes.org

RTM recommends "Visit Finger Lakes" as a name because it clearly and succinctly states the mission of the organization.

2. *Realign the Board of Directors to nineteen members*

RTM recommends streamlining the Board to contain 19 members and to be structured as follows:

- 14 County Representatives: One private sector tourism professional appointed by the elected legislative leadership in each of the constituent counties.
- 5 TPA Representatives: 5 TPA Directors will be elected to serve at-large and represent all TPAs in the FLA region. These 5 members will be elected by the TPAs.
- All board members will serve a rotating, 3-year term, with a 2-term limit.
- After two consecutive terms a Board member must be off the Board for a minimum of one year before being eligible for reappointment.
- The Board will meet every other month.
- The Board officers will be elected annually by the Board.

3. *Move the FLA offices to Geneva/Canandaigua area*

The existing offices are dated and ill-equipped for FLA's revised mission. The cost of staying & renovating or moving to new space is about the same. A move to the Geneva/Canandaigua area signals change while providing for a larger pool of resources and overall convenience.

4. **Change the operation of FLA to focus clearly on marketing and promotion. Eliminate any activities that are not a part of marketing and promoting the region as a tourism destination.**
5. **Adjust the size of staff for FLA to appropriately match the shift in focus to a marketing organization.**
 - A. President
 - B. Public Relations and Marketing Manager (Advertising)
 - C. Group Tour and Leisure Coordinator (Supports B)
 - D. Technology Manager (Website, e-updates, inquiry database)
 - E. Office Manager
Receptionist, telephone inquiry manager, fulfillment (along with fulfillment house), and bookkeeper (payroll is outsourced).
 - F. Optional Office Support (if additional staffing is required to handle grants, data basing and fulfillment)
6. **Change membership in FLA to structured levels of participation in advertising and promotion**
7. **Funding for FLA: Counties, State, and Members**

Marketing Recommendations

8. **Annual report and upcoming year work plan**
Presented to the industry annually in October, with follow-up presentations to the 14 county constituents.
9. **Recommended market positioning:**
After comprehensively capturing the voice of the customer in this research study, RTM believes the positioning statement can be made more motivational by highlighting the specific unique “attractors” and activities most valued in the Finger Lakes by visitors. Specifically this includes:
 - Natural beauty/scenery
 - Charming (small) towns (atmosphere)
 - Wineries
 - Fun things to see and do (specific attractions & events)

Thus, RTM recommends the following:

***New York’s Finger Lakes Region
Lakes, mountains, wineries, and history
From charming villages to city lights***

***From waterfalls to top-rated museums, charming towns to dynamic cities,
spring wildflowers to winter skiing, lovely lakeside scenery, unique
wineries, and a wide range of lodging, dining and shopping await you in
New York’s Finger Lakes. Come play!***

**Visit Finger Lakes
www.visitfingerlakes.org**

10. **Allocate 65% of marketing resources to “core” markets outside of the region, 20% to in-region cross-promotion, and 15% of resources to establishing new markets.**
11. **Clear, consistent communication with marketing constituents**
The overwhelming consensus is that current mailings are confusing and poorly planned. Streamlined, planned mailing will achieve better results.
12. **Streamline volume of marketing materials**
RTM recommends to FLA and to its marketing constituents in the 14 counties that they reduce and consolidate the sheer volume and variety of print materials for tourism promotion within the region. The visitor will benefit once the conflicting messages in too many brochures are eliminated.
13. **More strategic use of the term “Finger Lakes”**
RTM encourages all marketing entities in the Finger Lakes region to be more strategic in how they utilize the term “Finger Lakes”. Don’t competitively use this term so aggressively that it confuses the visitor and damages the marketplace.
14. **Print Materials**
RTM recommends that FLA reduce its print pieces to include the following:
 - A. Lure Piece
 - B. Visitor Guide
 - C. Mini-guide & Map
 - D. Group Tour KitThe design, ad sales and printing should be outsourced for cost and time efficiency. This is the standard for most regional and state promotion agencies.
15. **Advertisement design**
All ads should reflect the recommended branding and positioning statement and contain specific compelling reasons to visit the area.
16. **Advertising planning and placement**
Conduct annual advertising conversion study. Research should be the foundation of all future advertising placement decisions.
17. **Public relations efforts**
A strong public relations program is a critical marketing tool for FLA. RTM recommends planning and tracking on an annual basis.
18. **Educate and enroll residents in all 14 counties by annually sharing information on the current status of visitation to the Finger Lakes and how FLA works to achieve economic impact.**
RTM recommends that FLA plan for an annual report to the 14 communities perhaps titled “*The State of Tourism In The Finger Lakes.*”
19. **Inquiry and fulfillment procedures:**
RTM recommends new inquiry and database collection methods to allow for better data capture and analysis.
20. **Establish a strong technology strategy for marketing and promotion**
Research findings indicate www.fingerlakes.org was rated 8th as source of inquiry. It should be one of the top 3 sources.

21. **Trade/consumer shows**
Strategic attendance based on target marketing. Improve follow-up.
22. **Annual wayfinding improvement strategy**
A “buddy system” to review wayfinding annually in all 14 counties by exchanging teams to document findings.

Recommended New Products

23. **Recruit upscale Dining**
24. **Promote existing overnight canal/lake barge cruises**
25. **Add a region-wide September Wine Festival**
26. **Recruit new lakefront spas and resorts**
27. **Add an Erie Canal Interpretive Center (perhaps with aquarium)**
28. **Support development of Carousel Center in Syracuse**
29. **Recruit upscale, lakeside lodging**
30. **Lake access – improve promotion of existing access**
31. **Package existing Arts & Crafts facilities into a “trail”**
32. **Long-term: Add a “Wine Learning Center”**
33. **Long-term: Add a significant league sports facility**
34. **Long-term: Add a Finger Lakes Region Nature & Heritage Center**
Perhaps expand *Beaver Lake Nature Center* in Syracuse or the Cornell University birding and wildlife center.
35. **Seasonal tourism promotions**
Develop seasonal reasons to visit Finger Lakes and strategically promote.
36. **Long-Term: Encourage State of New York to establish major Gateway Visitor Centers (from the east and from the south)**

Continuing Research, Tracking & Monitoring

37. **Annual Current Status Report**
38. **Visitor satisfaction checks (throughout the year)**
39. **Conduct visitor profile and conversion research every three years**
40. **Annual evaluation of inquiry point of origin**
41. **Annual advertising conversion study**
42. **Annual report of web site research**
43. **Annual documentation and analysis of current status**
44. **Inquiry Database “Data mining” (frequent review, annual reports)**