

Destination Wide Market Analysis & Strategic Marketing Plan
FINGER LAKES REGIONAL TOURISM COUNCIL



JLL Hotels and Hospitality Tourism Group

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Executive Summary

JLL has completed a process to develop new priorities and set an enhanced course for the Finger Lakes Regional Tourism Council (FLRTC). The goal of this study, and the overall approach, was to engage the Board of Directors (Board), stakeholders and strategic partners in determining key areas of future focus for FLRTC that would support tourism in the Finger Lakes Region (Region). In addition, JLL conducted a research project that was focused on determining current and future target visitor markets for the individual Tourism Promotion Agencies (TPAs) as well as the Region as a whole.

JLL has conducted four focus groups encompassing stakeholders from all areas of the Region. In addition, a stakeholder survey was sent to over 4,000 tourism related businesses and organizations to gain their feedback on current priorities and future focus. JLL also sent a monthly update to the same database of stakeholders, reaching over 4,000, designed to be informative on the progress and solicit additional feedback throughout the 14-month process. JLL has participated in monthly Board meetings and Executive Committee meetings and conducted multiple individual sessions with each board member. JLL also has met with the Finger Lakes Tourism Alliance, Finger Lakes Wine Country, Empire State Development, I love New York and the Regional Economic Development Councils from the Finger Lakes, Central NY and Southern Tier.

The goal of the extensive engagement and outreach process was to insure a broad spectrum of input as well as gain consensus in the development of the recommended priorities. This proved to be critical in gaining the support of the FLRTC Board. The priorities and overall direction contained in this report have been approved by the Board in a recent board meeting on July 21, 2016. This vote signaled the board's interest in enhancing the overall effectiveness and breadth of FLRTC.

Development of Key Priorities

JLL recommended new priorities designed to set the course for the future of the organization. These recommendations were discussed with the board of directors in a series of meetings and one on one discussions. Through this the following priorities have been approved by the board:

1. Public Relations
2. Research
3. Website
4. Coordination/Support of Joint TPA Marketing
5. Content Development
6. Direct Marketing – Market Testing
7. Regional Stakeholder Communication
8. Advocacy
9. REDC Research Support
10. Experience Development

JLL has created a proposed timeline for implementation of these priorities. The overall proposed goal is to have all of the priorities fully functional by the end of fiscal year 2018/2019. This is an aggressive timeline due to the fact that it will include implementing the organizational enhancements that were also approved by the board.

Organizational Functionality

The process of gaining input and ultimate consensus with the board of directors highlighted an important consideration. The on-going decision making and engagement of the board has to remain at a high level for this plan to be successful. The ability to plan for and engage in key discussions at the board meetings and ongoing participation will be vital for sustainable success. The broad spectrum of organizations represented on the board and differing priorities within local jurisdictions magnifies the importance of broad based engagement and participation in ongoing decision making. This dynamic also surfaced the need to look at evolving the current

organizational model. There was strong consensus on the importance of having an executive director, who would take a leadership role in achieving the current and new priorities, while supporting an approach to have an ongoing engaged board of directors. Without an engaged board of directors and an effective decision making process, the success of this plan will be greatly hampered.

Hybrid Model

The model that was supported by the board is a “hybrid” approach that develops a contract with a firm to provide services in support of FLRTC priorities including the hiring of an executive director. This model can deliver a high level of engagement without the FLRTC employing a staff member directly. The next step is to draft a new agreement and determine the most effective process to engage a firm to implement the new organizational model and support the new deliverables.

Internal Leadership – the need for an enhanced approach

The Board’s support of an organizational model that provides needed leadership through the concept of a contracted Executive Director is a very important future direction for FLRTC’s overall effectiveness. An effective and supported executive director will provide leadership and continuity in accomplishing the goals that are agreed to by the Board. While this position will be part of an overall contract for services, the Board needs to be active in the hiring and monitoring of performance.

Pillars for Success - TPA Support, Marketing and Industry Engagement

One of the outcomes of this process was the on-going discussion of the mission of FLRTC. In order for the organization to have the greatest impact on behalf of its stakeholders as the designated tourism promotion agency as designated by New York State for this Region, the new priorities of FLRTC can be organized under the below categories:

1. TPA Support – Many of the current and future priorities are designed to support the individual TPAs. These include coordination of marketing efforts, research and content development.
2. Regional Marketing – Another set of the recommendations are focused on marketing on behalf of the Region. These include the website development and continued public relations with an expanded opportunity for proactive PR.
3. Industry Engagement – A third set of priorities are focused on growing industry support and awareness of the FLRTC as a resource to related organizations and stakeholders. These include advocacy, stakeholder engagement and REDC support.



These three pillars will become the guiding principles by which the FLRTC, and its contracted firm, will move to support its stakeholder businesses, partner organizations and overall tourism awareness in the region.

Research Overview

JLL conducted research designed to uncover the breakdown of current market segments that were visiting the Finger Lakes as a tool to determine future marketing strategies and focus. The methodology was to utilize individual TPA’s inquiry databases and engage Nielson Companies to use their PRIZM data for market analysis. JLL presented the results in the aggregate as a region as well as provided individual reports for each of the TPAs. The reports included a geographical analysis of where the highest concentration of the top market segments resided within a 400-mile radius of the Finger Lakes Region.

The results of the research validated some information that already existed as well as raised the question of where the marketing focus should be in the short and longer term to deliver the highest return.

The concept of ongoing research as a priority for FLRTC was highly supported by the Board of Directors. The information that was provided has supported TPAs individual marketing efforts and provided a platform for securing additional grant funding in the future.

JLL met with the state tourism office to review the research and gain feedback. This dialogue should continue to confirm alignment and collective support for future marketing efforts.

Conclusion

The process of developing the enhanced focus for FLRTC has uncovered new direction as well as the need to evolve the organizational structure for future success. It is imperative that the board remain unified and committed to support the development of the recommended priorities. The next few years will be pivotal in setting the organizational platform for many years to come. FLRTC is poised to make an impact in the areas that have been identified which will support increased visitor activity. This cannot be accomplished in a vacuum and the local, regional and state partners need to be engaged and welcomed to collaborate in achieving the common goal. JLL would like to thank the FLRTC Board of Directors and the tourism stakeholders for their invaluable input.

Stakeholder Engagement

Stakeholder input has been central to this process. It has been essential to understanding the regional dynamics and in determining priorities. Community and stakeholder engagement should continue to inform the implementation and evolution of the FLRTC's process.

JLL hosted four initial focus groups throughout the region, held individual meetings and phone calls with additional stakeholders, agency heads and others involved with tourism at the local, regional and state levels and facilitated discussions at monthly meetings of the FLRTC Board. Key regional stakeholder meetings included the Finger Lakes Tourism Alliance, The Finger Lakes Wine Country Tourism Marketing Association, Regional Economic Development Councils and the New York State Division of Tourism.

JLL conducted a survey that was distributed to over 4,000 regional stakeholders. The survey was designed to get the industry's perception of the Finger Lakes as a destination as well as understand key priorities for improvement. The survey was well received with a 50% open rate and nearly 400 completed surveys. In addition to the survey, those stakeholders also received regular email updates from JLL on the process. This level of interest was informative in determining that on-going stakeholder engagement should be a priority of FLRTC.

The results of the survey point up the need for coordination in marketing efforts within the counties and other regional and state marketing partners. This has been identified as a foundational approach to the implementation of the new priorities for FLRTC.

In addition, stakeholders were asked to identify Finger Lakes top markets by demographic and location. The results had similarities to the segments that were identified in the JLL research. The need for seasonal support in the winter and spring was also identified by the respondents.

Research was identified as a useful resource for stakeholders. Over 70% of the respondents expressed an interest in understanding the demographics of the visitors that come to the Finger Lakes. This could provide an opportunity for FLRTC to be a resource through on-going research efforts.

Finally, the respondents were asked about their awareness of FLRTC. One third of the respondents were aware of FLRTC and nearly 90% were interested in being more informed in the future. This was another indicator of the importance of ongoing stakeholder engagement.

The stakeholder survey and ongoing stakeholder communication and input has provided a valuable perspective on the development of the priorities for FLRTC. Ongoing engagement with stakeholders is an approved priority going forward and will provide an important platform for success. The success of this level of participation points out the importance of maintaining a high level of engagement and collaboration going forward.

Research Review

Benchmarking

For the FLRTC to grow as an organization under the New York State Statute as a Regional Tourism Council, JLL focused benchmarking primarily on a singular organization that has shown great success in this model: Visit Adirondacks. The Adirondacks Region has become synonymous with the beautiful outdoors as an experience for visitors to New York State and to better understand their success, JLL spoke directly with the Executive Director Ron Ofner. The below encompasses the Visit Adirondacks model as a Regional Tourism Council:

Organizational Model:

- TPA based membership – Visit Adirondacks is comprised of seven counties with a Board and Executive Director. The staffing is comprised of the Executive Director, an accountant and an outside agency for all PR and marketing efforts.
- The TPAs that make up Visit Adirondacks are both county tourism departments and chambers of commerce.

Budget and Funding:

- Visit Adirondacks has an approximate annual budget of \$600,000.
- The TPA matching funds are the primary resource with little to no outside revenue.
- Not all TPAs are required to contribute the same dollar amount to the regional effort.
- Visit Adirondacks is contracted by New York State to operate a visitor center at the Beacon Center.

Marketing and Public Relations:

- Visit Adirondacks is primarily focused on regional PR and marketing. They do not get involved in any inter-regional marketing efforts. Visit Adirondacks handles everything outside the region and pushes the inter regional marketing back to the TPAs.
- They will also leverage individual TPA marketing efforts outside the region when possible, but will not lead an individual TPA effort.
- The Visit Adirondacks website is a more dynamic experience than the current FLRTC website, but is still a referral network for the individual TPAs and locations within the region. There is approximately \$100,000 invested annually to produce dynamic content, manage the website and overall upkeep.
- Visit Adirondacks has made their marketing about the region as a whole and sub-regions within it rather than use county or TPA lines as boundaries. These include nine counties and 12 overall sub-regions. Visit Adirondacks has used the visitors interest to shape the sub-regions rather than the individual county boundaries.
- Visit Adirondacks main metric for marketing and website tracking is visitors to the main site and referrals to TPA sites.

Group Sales:

- Visit Adirondacks has a group component to the website, but it is primarily an informational page with group tour contacts for the sub-regions and things to do with groups in the area. Visit Adirondacks is not involved in direct group sales efforts.

Regional Involvement:

- Visit Adirondacks is a marketing organization first and a regional advocate second. They do not get involved in regional issues that affect tourism without being asked to join or support.
- The REDCs connected to the Visit Adirondacks' region are a resource and they will write letters of support for projects if asked, however they do not advocate for projects as to avoid conflict within their stakeholder base.
- Visit Adirondacks is not currently involved in research efforts, but is interested in becoming a thought leader in this area as a regional resource and organizational objective.

Visit Adirondacks has become a successful regional marketing organization in New York State. Ron Ofner, Executive Director of Visit Adirondacks, attributes their success to consistent awareness marketing outside of New York State and a cohesive board of TPAs that understand the values associated with regional marketing.

There are 11 designated tourism regions in New York State, all of which are determining their best course of action to become a premier regional destination. Of those outside of New York City and Long Island, the best known visitor region is the Adirondacks with the Finger Lakes Region close behind. The FLRTC is comprised of the largest geography and the highest number of counties within a state designated region. While Visit Adirondacks has become successful there are a variety of ways to gain insight from their success and develop a practice for the FLRTC to better the organization for regional support and overall effectiveness, which this plan is poised to do.

The review of Visit Adirondacks was helpful in understanding how the organization functioned and how they set their priorities. These observations have provided important input in deciding the future organizational and funding models for FLRTC.

Segmentation Analysis

JLL conducted research that was designed to gain an in-depth understanding of current visitor markets as well as identify potential markets for the future of the Finger Lakes. To do this, JLL collected over 80,000 records of domestic visitors who primarily had made an inquiry to one of the 14 TPAs that make up the Finger Lakes region. In addition, JLL collected over 20,000 records of Canadian visitors who had also made inquiries.

These visitor records were run through the Nielsen PRIZM Segmentation analysis. Nielsen's PRIZM defines every U.S. household in terms of 66 demographically and behaviorally distinct types, or "segments," to help marketers discern those consumers' likes, dislikes, lifestyles and purchase behaviors. PRIZM provides the "common language" for marketing in an increasingly diverse and complex American marketplace. PRIZM's 66 segments are numbered according to socioeconomic rank (which takes into account characteristics such as income, education, occupation and home value) and are grouped into 11 Lifestage Groups and 14 Social Groups. PRIZM Social Groups are based on urbanization and socioeconomic rank. PRIZM Lifestage Groups are based on age, socioeconomic rank, and the presence of children at home.

JLL utilized the Nielsen PRIZM Segmentation to understand the characteristics of visitors in the Region and provide the FLRTC with detailed visitor demographics that enable the organization and TPAs to specifically target markets with the highest ROI in the future.

The results of the domestic research indicated that there were broad common characteristics that showed up in the top five segments of the Finger Lakes Region. These included a strong level of wealth and financial capacity, residents in both smaller suburban and rural environments, a large segment who did not have children at home, and an age range from 35 to 64. For additional detail please see the appendix of this report.

The support of ongoing research will continue to strengthen the approaches that are being used to attract visitors into the region.

A synopsis of the aggregate results for the region shows that the top current visitors to the Finger Lakes Region have some common traits. These include:

- Predominantly middle age to older (35-64)
- Caucasian
- Primary residence is in a more rural or small town setting
- Upper Middle household income (~83,000)
- Households predominantly without children

Next Steps – Market Testing through Direct Marketing

JLL will be working with FLRTC to conduct market tests to validate the results of the research. The goal of this phase is to deliver compelling Finger Lakes experiences to the audiences that have been identified from the research and validate their level of interest. In addition, this will also gauge what types of experiences have the most appeal to the identified market segments. These will be conducted twice in the upcoming fiscal year to gain intelligence on two seasons of the year.

In addition to the analysis of the top segments showing interest in the Finger Lakes, it is also important to ascertain those segments that represent potential travelers. The overarching area that shows great promise is upper income households with children. This finding points to a need to invest in opportunities to enhance the family experiences in the Finger Lakes. To add to this, the stakeholder survey highlighted an interest from stakeholders in seeing future investment in this area.

The development of an ongoing research plan will position FLRTC as a resource for the TPAs and potentially other partners and stakeholders. This will be a valuable enhancement to FLRTC's overall program of work.

Sales and Marketing

JLL reviewed the current objectives of the FLRTC's sales and marketing efforts during the engagement to understand how and at what level the organization is involved in sales and marketing beyond the focused PR efforts. The discussion included both leisure and group efforts. The current mission of the FLRTC is focused on public relations and the organization is currently not active in a sales function.

Leisure

As mentioned in the previous sections, JLL conducted in depth research utilizing visitor inquiry data from the Region to refine the leisure target markets for the FLRTC. JLL believes the foundation for all future leisure sales and marketing efforts should be research-based and focused on segments that are currently interested and could be expanded on.

The organizational priorities outlined previously do not include additional emphasis on new sales activity, however as a key pillar for success the marketing efforts are focused on increasing awareness of the Region to current and future visitors. The priorities outlined are focused on different aspects of supporting the marketing capabilities of the organization as well as the individual TPAs. These include: Coordination and Support of Joint TPA Marketing, Content Development, Website Development, Research and Direct Marketing. These priorities will continue to evolve the FLRTC's impact and influence on the Region and visitors.

Group

During this engagement, JLL discussed group sales and marketing with the Board, stakeholders and other regional organizations to understand the demand and interest in group business. These targeted types of groups would include Association and Corporate Meetings, Group Tours and Social Events (weddings). The discussions centered around both the importance of these groups to the Region and the perceived value if the FLRTC would invest resources in direct marketing to meeting planners and tour operators to get them to book their groups in the region.

In the stakeholder survey less than 50% of the respondents felt that group business was valuable to their own business. It was evident across the conversations that while group business can be valuable to specific businesses in the industry that it was not a top priority for this organization. At this point in the organization's life, it is not a priority for the FLRTC.

Overall it is not currently recommended that FLRTC engage in direct selling either in individual or group sales. The priorities that have been established will support the TPA's in their ability to drive visitors to the region. The collective efforts including marketing will raise awareness of the Finger Lakes as a destination and support efforts that will improve the region for future visitors.

FLRTC Organizational Priorities

As discussed in the Executive Summary of this report, the Board approved the new priorities contained in this report during the July 21, 2016 meeting. These priorities serve as a new direction for the organization and must be included in the annual planning process for execution by the contracted firm and Executive Director. The priorities detailed on the following pages will bring the FLRTC to the forefront of the tourism discussion amongst regional and state stakeholders. These priorities will also ensure that the FLRTC is “at the table” as a thought leader in future planning efforts.

Public Relations

The FLRTC currently has a successful history of executing a public relations campaign on behalf of the Region. PR remained the number one priority for every Board Member throughout this process. Public Relations, as a re-thought priority, will now include a focus on the Nielsen segmentation results provided during this study. It is recommended that the FLRTC utilize the segmentation analysis to determine the type of marketing and PR campaigns executed as well as what media is most relevant. For more information on the segmentation please see the Research section of this report on the following pages.

As the PR for the FLRTC has been historically executed by a third party, it is recommended that role remain with the current contractor with this renewed focus. The PR efforts within this priority should also include a new dimension for proactive PR opportunities within the contract for PR services. This would include the ability to deploy efforts to increase awareness and overall education of the region with an opportunity to increase visitation tied to organic one-off occurrences. An example of this was the NCAA March Madness Tournament when the Region saw two teams from Syracuse made the men’s and women’s Final Four. That presented an opportunity to further expose the Region to its target markets while there was national media attention unfolding. During this example, the resources to coordinate a proactive effort were not in place and the Region missed a potentially valuable moment. This new approach will require on-going communication with the TPA’s and other sources to uncover new short-term opportunities. A portion of the budget will be reserved to support these efforts.

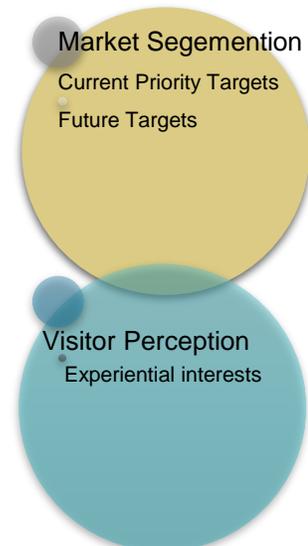
Public Relations should also include new, focused metrics, beyond broader exposure, which include website traffic and referrals to TPA websites as well as partner sites. The metrics should also include an analysis of how the PR activities reached the agreed upon target markets.

Research

During this process, JLL conducted extensive target market research on behalf of the Region and the individual TPAs. The value of this research, and continued efforts, was validated as it was designated as the second highest priority by the Board. As a top priority of the Board moving forward, the FLRTC has an opportunity to solidify its place as a thought leader in the Region and the State for executing research efforts and providing results to strategic partners and stakeholders.

It is recommended that the FLRTC continue with the research that was started during this process and develop an annual or bi-annual research plan to inform the Board and the industry further. This research should include, but is not limited to, the following categories:

- Target market validation – JLL used TPA inquiry databases to complete the segmentation analysis. With more detailed visitor records from hotels, B&Bs, attractions and other tourism activities, the FLRTC can narrow the current demographics down even further for future targeting.



- Visitor perception – with the target market data as the foundation, the FLRTC can further test the Region’s success among visitors with their perception of the experiences. This also presents an opportunity to test experiences with visitors – see Direct Marketing section.

This primary research above has positive implications for the organization to provide to stakeholders, but it also will add to the FLRTC’s legitimacy as the recognized New York State tourism organization. The FLRTC will have regional data that no other organization has and can provide such resources to partners, if deemed valuable. There is also a possible revenue stream for regional partners and stakeholders to either buy into larger resource projects or for I Love New York to support the FLRTC with additional funding to execute the research and analysis.

It is recommended the FLRTC engage an outside firm for this ongoing research support and finalize an approach for communicating the findings

Website Development

The current FLRTC website serves as an informational set of pages on the Region and the variety of visitor experiences. The Board’s desire for a more robust and engaging visitor-friendly site that is also designed for media referral brought this item to the forefront of the priorities list. The new website will be a more interactive site with dynamic content based on the current PR messages and regional offerings.

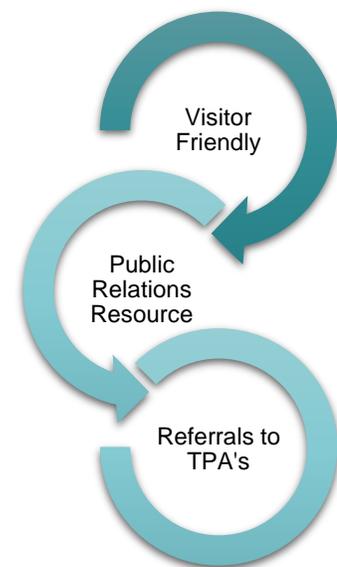
The key metrics for the website will be overall visitor traffic and referrals to the individual TPA sites. The FLRTC will need specific resources in place in order to execute on this priority including a web developer and future SEO support. Both of these items can be accomplished through a local contractor if available. An ongoing, sustainable effort to update and develop content will also be a requirement for this priority.

With the support of the contracted firm for services, it is desirable that the initial development process could be supported through grant funding. FLRTC has submitted a grant request. This would indicate that the hard costs on behalf of the FLRTC would only be for any future SEO support. This would not be needed until the year following the new site development.

Coordination and Support of Joint TPA Marketing

As the official tourism promotion agency for the Finger Lakes region, the FLRTC has a unique role to serve for both the Region as a whole and each of the individual TPA’s marketing efforts. As each TPA has slightly different plans and programs already in place, the FLRTC has worked with each TPA on regional, cross promotional marketing campaigns. In previous years the FLRTC has served the TPAs in this aspect as more of a “pass through” to market their individual destinations in a regional way. This new priority would shift the role of the FLRTC to be more active and engaged in supporting the programming with a larger section of TPAs rather than solely acting as a mechanism for one-off regional marketing attempts by individual TPAs. This also includes identifying new opportunities for participation in programs like cooperative opportunities with Brand USA or Travel Shows. These programs would be available to all TPA’s but not mandatory. The goal of these priorities is to support the TPA’s in multiple dimensions of joint marketing opportunities.

The FLRTC will be responsible for preparing an annual joint marketing plan including potential TPA participation opportunities. It is recommended that this priority use the existing segmentation analysis as a baseline for determining the target markets of the joint marketing efforts. In order to maximize the regional efforts, the TPA/NY State matching funds should be the main resource for this program.



The metrics will include web traffic as an indicator of interest. The number of joint promotions annually should also be determined as a goal and tracked as a metric. The eventual ability to track sales conversion should also be factored in.

Content Development

As a priority for the organization, Content Development is a new endeavor to further support both the regional marketing efforts as well as the individual TPA needs. This priority would involve the development and curation of relevant content that could be used to support social media and the new website. The development of this type of content should be done in conjunction with the website development as the content can be repurposed i.e. b-roll, photos, etc.

It is recommended that the annual business plan for the FLRTC include goals for social and digital activity using this content for regular features and social posts about the Region. Metrics tied to this priority include both web traffic and social engagement as well as individual TPA engagement.

This priority serves to further the FLRTC's visibility within the Region to stakeholders and visitors alike as well as provide the TPAs with high quality content to use at their discretion.

Direct Marketing (Research and Market Testing)

As the Board placed a strong emphasis on the Research priority, it became clear that the FLRTC has an opportunity to validate that visitor research by implementing a direct marketing strategy to test the research results. Direct Marketing, as a priority for the organization, will be included in the annual business plan to test research based on Board concurrence, initially there will be two "tests" per year in order to capture interest in seasonal experiences. This type of Direct Marketing will continue to elevate the FLRTC as a thought leader in the industry and the Region.

This priority will require the FLRTC to develop products and experiences in conjunction with the TPA's to be tested with the target markets. The FLRTC Executive Director and the contracted support staff will coordinate all elements of the test product including the purchasing of the target market lists, website landing page, fulfillment processes, research firm needs, results and analysis. The FLRTC will use these results to recommend enhancements and changes to future TPA and Regional visitor offerings.

The metrics for this priority will be the effectiveness of the market tests in generating interest and the completion of the agreed upon number of tests.

Regional Stakeholder Communication

As described in the Executive Summary and Stakeholder Engagement sections of this report, the FLRTC and JLL engaged a broad spectrum of regional stakeholders in the study process. This type of outreach on behalf of the FLRTC has not been a role of the organization previously, however the results and engagement back from the stakeholders proved to be insightful to the point where the Board believes in continuing this effort.

As each TPA has a role within its county's stakeholders, the FLRTC's communication will be solely focused on regional issues and is not meant to replace the TPAs' respective outreach. As all 14 TPAs have unique stakeholders it will be important for the organization to develop a regional stakeholder list with input from all TPAs combined.

Regional communication efforts should include:

- Annual surveys
- Regular (quarterly) stakeholder updates
- Communication of an Annual/biannual dashboard based on FLRTC metrics



Excerpt from past JLL Stakeholder Communication

The key audiences for the FLRTC's Regional Stakeholder Communication priority includes industry businesses, REDCs surrounding the Region, FLTA, Finger Lakes Wine Country (FLWC) and I Love NY as well as its parent organization, Empire State Development. This level of stakeholder engagement and overall communication will continue to elevate the FLRTC in the Region as well as provide a platform for feedback to understand the community's thoughts and feelings on future PR and marketing efforts.

The metrics for this will include the engagement rates of FLRTC communications and level of feedback.

Advocacy

The Advocacy priority will require the Board to develop an annual plan with key messages regarding the Region to focus on. The Board and Executive Director will need to come to consensus on the top positive regional industry attributes and messages. This priority of Advocacy should also be thought through in conjunction with the Proactive PR efforts to determine new opportunities to continue to deliver positive news to the Region. Opportunities where the issue is controversial or would require supporting an individual TPA at the detriment of other TPA's will be avoided. However, Advocacy that can strengthen the support of an individual TPA within their community will be a positive outcome of a successful advocacy plan.

The activation of this priority will include the Executive Director conducting regional research as well as engaging the Board to supply and develop potential opportunities. The key audiences for this priority include the REDCs, I Love NY and regional stakeholders.

The success of this priority will be the type and quantity of recognition the Finger Lakes Region receives with the key audiences mentioned above.

REDC Research Support

As the FLRTC looks to increase its positioning as a thought leader in the Region, it is imperative to be aligned with complementary regional organizations i.e. the REDCs, of which there are three connected to Region. Recently all three REDCs received a substantial infusion of capital as an outcome of successfully competing for designated state resources.

This priority includes the development and fostering of a close relationship with the REDCs by providing the organizations with market research, visitor data, stakeholder data and other valuable insights to support the REDCs mission. As a point of clarification, this new direction does not include advocating for specific projects as that has the potential of having FLRTC support one TPA's project over another.

This type of support and partnership with the REDCs will position the FLRTC as a valuable resource for the Region. One measurable outcome of a successful effort will be the percentage of tourism related projects that are funded by the three REDCs. With this objective in the forefront of the FLRTC's priorities, there is also the potential to expand this opportunity for commissioned research projects on behalf of the REDCs or other similar organizations.

Experience Development - Phase Two

Experience Development would involve the FLRTC being an active participant in developing specific visitor experiences utilizing stakeholder businesses and regional attractions to build enticing offerings. This priority would be predicated on the FLRTC researching and vetting viable experiences to offer and then gaining consensus and a sustainable level of participation. Experience Development would also require the FLRTC to be involved in the execution and delivery of the experience including:

- Idea Development
- Product Coordination
- Fulfillment Plan



- Pricing Model
- Tracking Results

The FLRTC would not be responsible for the direct fulfillment or transactional needs for Experience Development. Those items would remain with the individual TPAs and the FLRTC would support and oversee the implementation of this portion of the organizations plan. The FLRTC would however, be responsible for all of the coordination elements of each experience development.

It is recommended that this priority remain a “phase two” consideration for the future once the initial priorities are up and running. The board of directors will determine when in the future this priority should be considered.

Metrics and Measurement

The following are the potential metrics that can be used to monitor the approved priorities. JLL recommends creating a reporting process for the board to communicate the success of each area.

Priority	Metric One	Metric Two	Comments
<i>Public Relations</i>	Advertising Equivalency by target market, media impressions and quality of placements.	Web Activity generated on the media sections	In addition to this there may be a goal of the number of proactive PR actions.
<i>Research</i>	Projects Completed	Level of engagement by TPA's and stakeholders	The amount of usage of the research for specific marketing initiatives by the TPA's would be a measurement of success
<i>Website Development</i>	Visitor activity statistics. Example unique visitors; page views; media page usage	TPA referrals.	The metrics will encompass both the direct visitor activity and set quantitative goals for TPA referrals.
<i>Coordination and Support of TPA Joint Marketing efforts</i>	Completion of agreed upon number of annual projects	Success of the marketing efforts measured by exposure and conversion when possible	The metrics would include both the number of campaigns and the specific success measured in conjunction with the participating TPA's
<i>Content Development</i>	Online statistics of traffic that viewed the content and level of engagement	Number of and type of engagement by TPA's	Success is based on the on-line success of the content in retaining web visitors and the level of engagement by the TPA's
<i>Direct Marketing - Market Testing</i>	Level of engagement by targeted audiences; new market intelligence that is shared with TPA's.	Completion of agreed upon number of tests	In addition to completing the agreed upon number of market tests, the success of each test will be monitored. Examples include open rates; data base growth and conversion.
<i>Regional Stakeholder Communication</i>	Level of engagement in written communication and annual survey i.e. Open Rates and Survey Responses.	Completion of annual plan including frequency of communication and annual survey	This is an area that is measured by the level of engagement of the stakeholders and the successful completion of the agreed upon plan including updates and an annual survey. JLL's initial survey can be a baseline for familiarization measurement.

<i>Advocacy</i>	Adoption of key FLRTC messages by targeted organizations and partners	Completion of annual plan including the delivery of agreed upon messages	Advocacy is measured by the number of times FLRTC messaging is incorporated with key partners to support a desired result.
<i>REDC Support</i>	Percent of total available funding dedicated to tourism related projects	Completing of a plan to include the frequency and content of supporting research and data.	Ultimate success is that tourism gets "its share" of the available funding.

JLL recommends that a report is developed that takes into account the agreed upon goals and tracks the results on a monthly basis. This will create an objective approach to determine the success level of each of FLRTC priorities. Some of the metrics are easier to track than others. However, some objective approach to evaluation success should be instituted for every priority.

The Visitor Center

In taking over a previous 501(C)3, the FLRTC has overseen a contract and provided oversight and staffing of the visitor center located at the Scottsville Travel Plaza on the NYS Thruway. The Visitor Center operation is contracted to the FLRTC through I Love NY with state funding. The Visitor Center is currently staffed with Travel Counselors and presents an opportunity for first person research and data gathering as well as sales for future revenue generation.

The support for the ongoing oversight of the Visitor Center was mixed. There was consensus that if FLRTC is going to oversee the Visitor Center and provide visitor services, the level of service and overall approach needs to evolve.

This included moving to “concierge” style of service where the staff would have first-hand knowledge of the region and make recommendations to enhance visitor’s experiences. This would also include the staff handling online inquiries and following up with perspective visitors to determine how they can help them in making their vacation decisions.

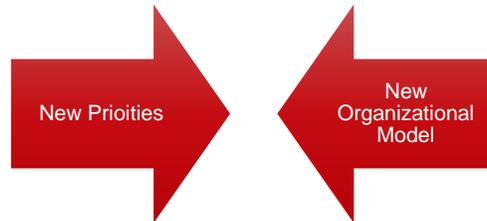
There is also a need to invest capital to improve the physical space of the visitor center. Funding has been requested to make the necessary improvements which will enhance the visitor experience going forward.

An additional opportunity that can be leveraged out of the Visitor Center is to provide ongoing research by surveying visitors. This can be done by setting up a few specific questions that the staff would ask or having an electronic survey vehicle in the Visitor Center.

JLL recommends that FLRTC remain engaged with the visitor center and oversee the improvements to service as well as the physical needs. In conjunction with the Board, this will give everyone an opportunity to determine how the Visitor Center and visitor services fit into the overall mission.

Initial Implementation

The successful implementation of the new vision for FLRTC includes two key components. They are the development of the new organizational model and the implementation of the agreed upon priorities. The following are recommended approaches to implementation.



The coordination of these will be important in maximizing current and future efforts. As stated later in the report, it is recommended that a committee is formed to determine the best approach to implementing the new organizational approach. Depending on the approach taken for organizational implementation, it is recommended that the implementation of the new priorities begins January 1st. This will expedite the implementation and help clarify the overall requirements. The timelines below reflect this approach.

Organizational Structure

The process to implement the new organizational model will include the following:

1. Development of a “scope of services” document
 - a. This will include the current scope of services with the new priorities and the requirement to provide an Executive Director
2. Finalize the budget that will be allocated for the services.
 - a. Using the budget that has been developed in this process, finalize the resources that are available for a firm to provide the current and expanded services.
3. Determine the most advantageous procurement process.
 - a. The procurement approaches could be sole source, request for qualifications (RFQ) or a request for proposal (RFP). The advantage to a RFQ approach is that it gives the selection committee the ability to match the qualifications of a firm with the needs of the organization and then finalize the financial arrangements. The advantage of an RFP is that the proposing firms develop a budget that is determined as part of the selection process. The advantage of sole source is the expedited procurement process which will lead to a potentially timelier implementation.
4. Appoint a selection committee
 - a. A selection committee would be appointed to review the initial proposals and determine the most qualified and compatible firms.
 - b. In the event of a sole source approach, a committee would be formed to negotiate an acceptable contract and approach for review and approval by the full board.
5. Select a firm
 - a. The Board of Directors would interview the final candidate firms and make the final decision. This could include the firms presenting their proposed Executive Directors.

Organizational Structure Process



TPA Investment

Implementation of these new priorities has an incremental budget implication of approximately \$5,000 per TPA, bringing the total investment needed to \$22,200 per TPA for FY17. This level of investment and approach was approved by the Board of Directors. The costs cover the implementation of several priorities in year one plus the cost of the organizational model.

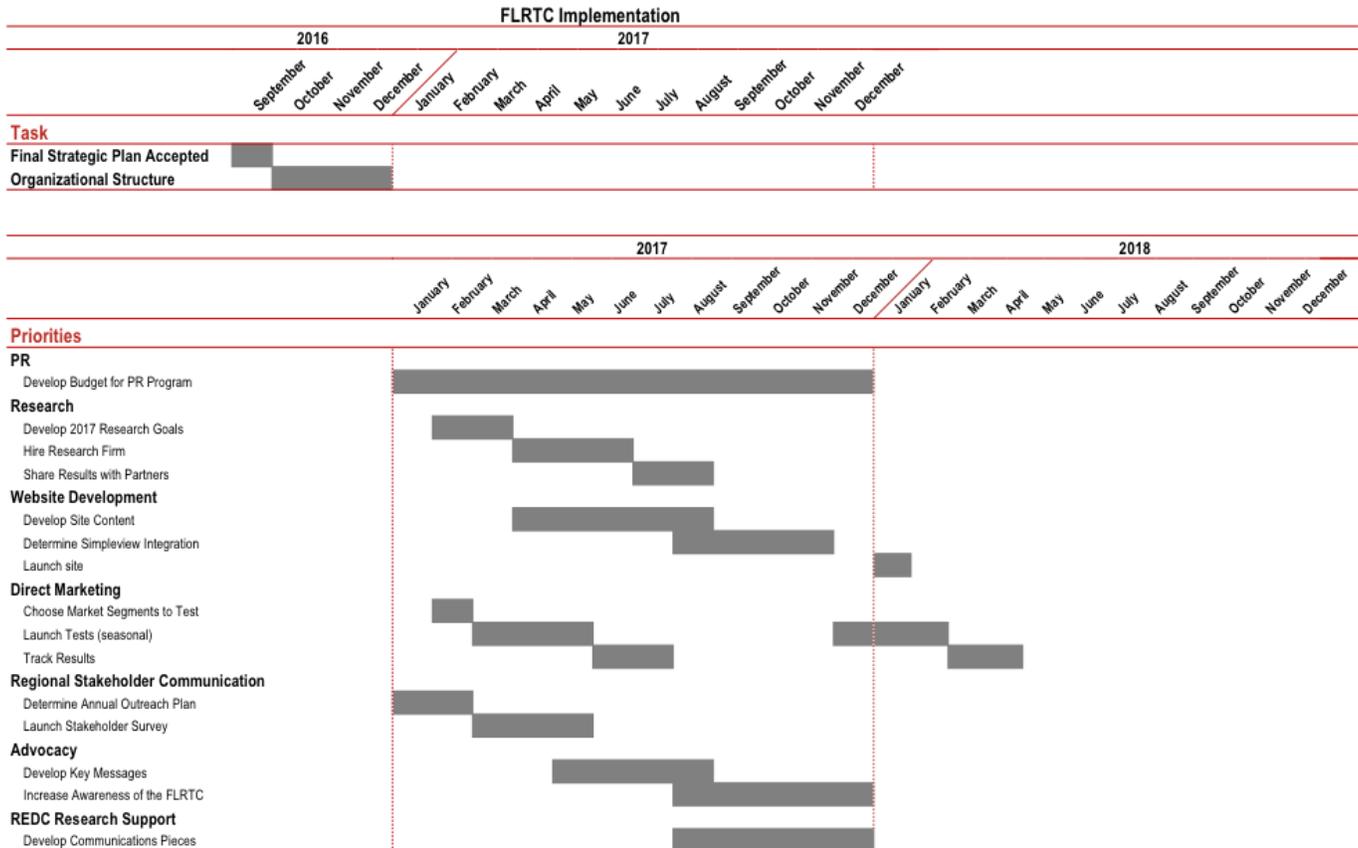
Implementation of Priorities

The following is an overview of the recommended new priorities and key factors for consideration in the implementation process.

Priority	Implementation for FY2017	Goal for FY2017
	Description	Key Factors
<i>Public Relations</i>	Agency of record retained and develops PR plan aligned with regional segments and ability to implement proactive PR efforts.	Determine budget for proactive PR opportunities. Execute short term opportunities in 2017 if opportunity is available.
<i>Research</i>	Develop and expand on current regional database for visitor research.	Hire third party research firm to complete next phase of visitor research and publish or share results with select partners.
<i>Website Development</i>	Develop “content rich” site for media and visitors to use as a travel resource.	Determine level of necessity for integration with Simpleview with ability to connect on the backend with I Love NY.
<i>Direct Marketing – Market Testing</i>	Test segmentation results with a minimum of two direct marketing pieces with specific experiences tailored for selected segments from the 2015-2016 JLL research.	Track results from the test for further refinement of the segmentation analysis. Finalize number of tests and timeframe.
<i>Regional Stakeholder Communication</i>	Develop a regional stakeholder database to be managed by the Executive Director.	Continue regular communication via email updates and conduct one annual region-wide survey.
<i>Advocacy</i>	Develop key messages for the Region and a timeline for such messaging to regional partners.	Awareness of the FLRTC’s role in the Region increases (use JLL stakeholder survey results as baseline for awareness).
<i>REDC Research Support</i>	Develop communication pieces to educate the REDCs on the importance of tourism.	Alignment of research and other reporting that will be valuable to the REDCs in prioritizing projects

Timeline

The time line bellow illustrates preliminary steps and timeframes to have the new priorities implemented and everything fully functional by the first quarter of 2018. The goal is to have the organizational implementation completed by January 2017.



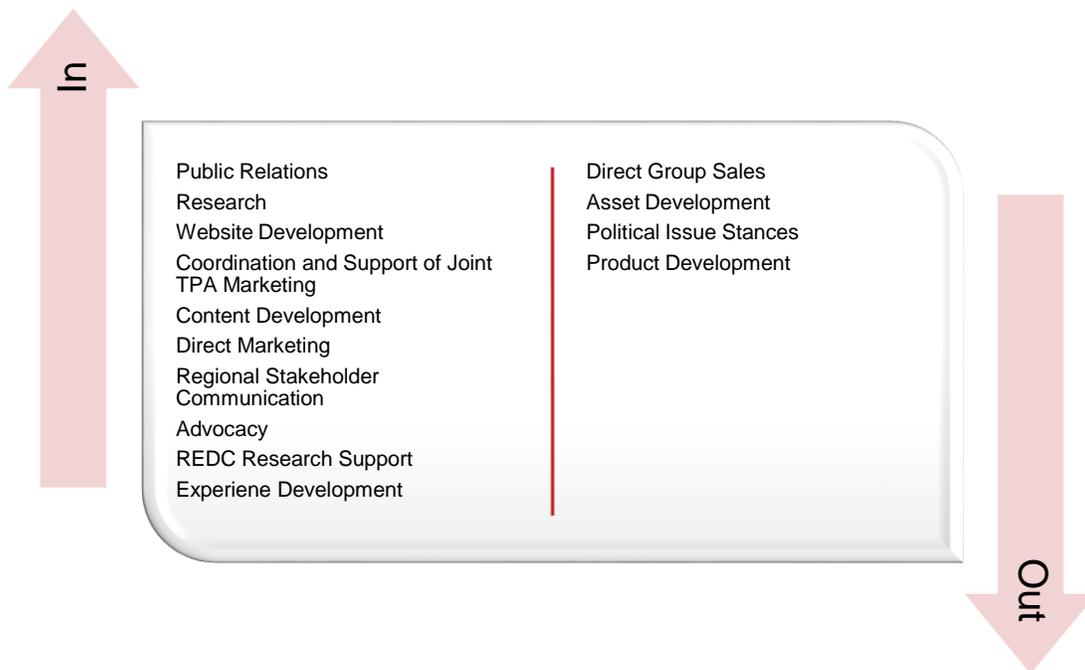
Future Positioning

As stated in the Executive Summary, the process that has been completed has helped provide focus for the FLRTC. The nine initial priorities that have been established create the opportunity for clarity of mission. JLL also uncovered areas that were deemed as outside of the mission of the FLRTC. These items were reviewed and it was determined that they should not be part of the current vision for the organization.

These activities determined as to not be priorities included developing a direct group sales effort, advocating for the development of specific tourism assets and political advocacy.

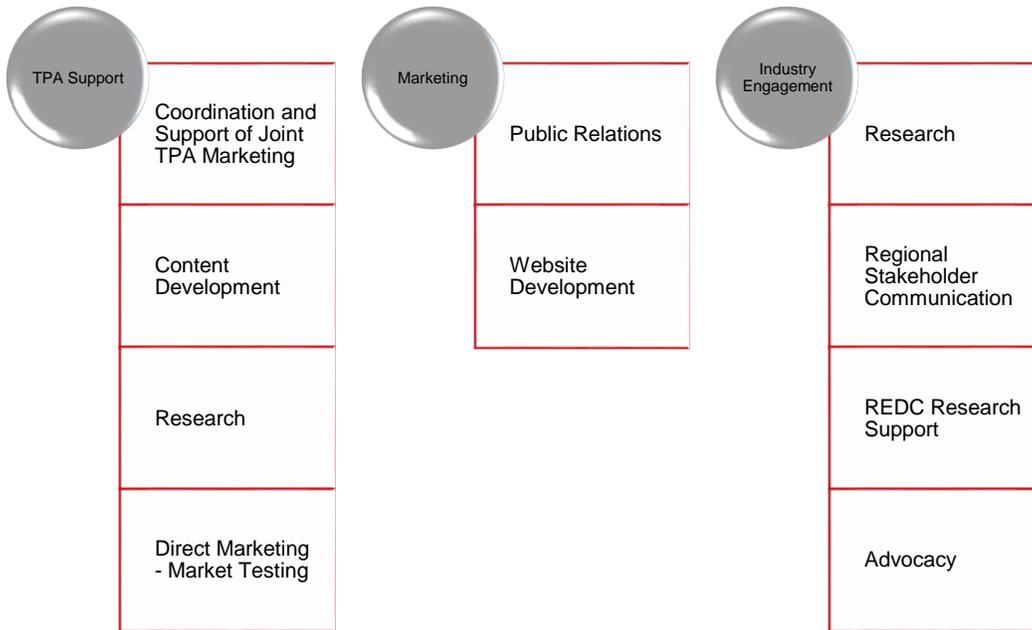
JLL has grouped the priorities that have been approved into three larger categories as described in the Executive Summary to further the FLRTC's recognition as the authority on tourism for the Region. These include:

1. TPA Support
2. Marketing
3. Industry Engagement



The priorities detailed in the previous section have risen to the top because of the impact the FLRTC believes they can have to support their stakeholders, regional partners and ultimately best serve the visitor. The above illustrates the priorities that have been included versus those that were screened out.

The graphic below organizes the priorities by how they fit into the key areas:



Conclusion

The priorities that have been established and approved by the Board of Directors of the Finger Lakes Regional Tourism Council set a new course for the organization for many years to come. In addition, the evolution of the organizational model to include a focused Executive Director brings a new foundation to lead the organization into a new chapter.

The evolution of FLTRC from a “committee” to a non-profit organization was an important move a few years ago. During that time many services were effectively delivered and positive results have been accomplished. The Board of Directors determined there was a need to understand where future opportunities exist in raising the profile and impact of the organization. The plan that has been described above does just that.

The key to on-going success is the effectiveness and commitment of the Board of Directors. The make-up of the Board, which is a necessity based on the funding structure, can be challenging and hinder effective and efficient decision making and execution. The process that has been completed has highlighted the need to develop a more effective decision making approach. The new structure with a dedicated Executive Director will help support this in the future.

The proposed implementation timeline should be adopted by the Board and become a standing agenda at each board meeting until completed. An important initial decision will be to finalize the approach to moving to the new structure. JLL recommends an approach that would dedicate a period of time to finalizing the requirements of a new agreement and then determining the most effective method of transitioning to the new structure.

This plan lays out an exciting new direction for FLTRC that will increase the overall effectiveness and impact for years to come.

JLL would like to thank the Board of Directors and the staff at Break the Ice Media for their involvement and commitment to this project.