

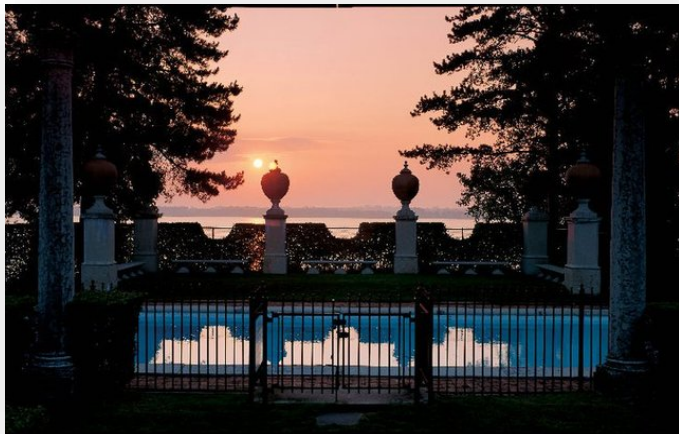


Ontario County, NY

2014/15 Travel Market Research and Strategic Direction for Finger Lakes Visitors Connection

Prepared for:

- *Finger Lakes Visitors Connection*
- *Report Submitted November 16, 2015*



Finger Lakes Visitors Connection

Market Research & Strategy

Objective:

The following research segments were conducted to update prior data (2012/13) and develop new strategies for the Finger Lakes Visitor Connection.

- Update visitor profile research and develop comparative visitor profile report. The data and report identify where successes have occurred and where improvements can be made to the program of work.
- Update lodging market research including STR data analysis. Particular emphasis is placed on identifying opportunities to increase occupancy and room demand during shoulder and off seasons.
- Lead strategic planning session with staff and Board of FLVC. Berkeley Young presented the research updated data and led a strategic planning session in Ontario County with FLVC Board and staff.
- Identify the need for additional research and tracking.



Ontario County Lodging Market

Lodging Survey STR 6-YR Trend Report

YSI Lodging Research Methodology

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Ontario County, NY at the request of the Finger Lakes Visitors Connection (FLVC). A one-page questionnaire was written by YSI, approved by FLVC and sent to all hotel/motel lodging properties actively collecting the Ontario County lodging tax. Properties were asked to estimate the following for the full calendar year 2014: percentage of occupancy driven by eight market segments, ranking of group market segments for future sales and marketing efforts, annual occupancy percentages and top leisure feeder cities.

Ontario County Lodging Inventory & YSI Survey Response

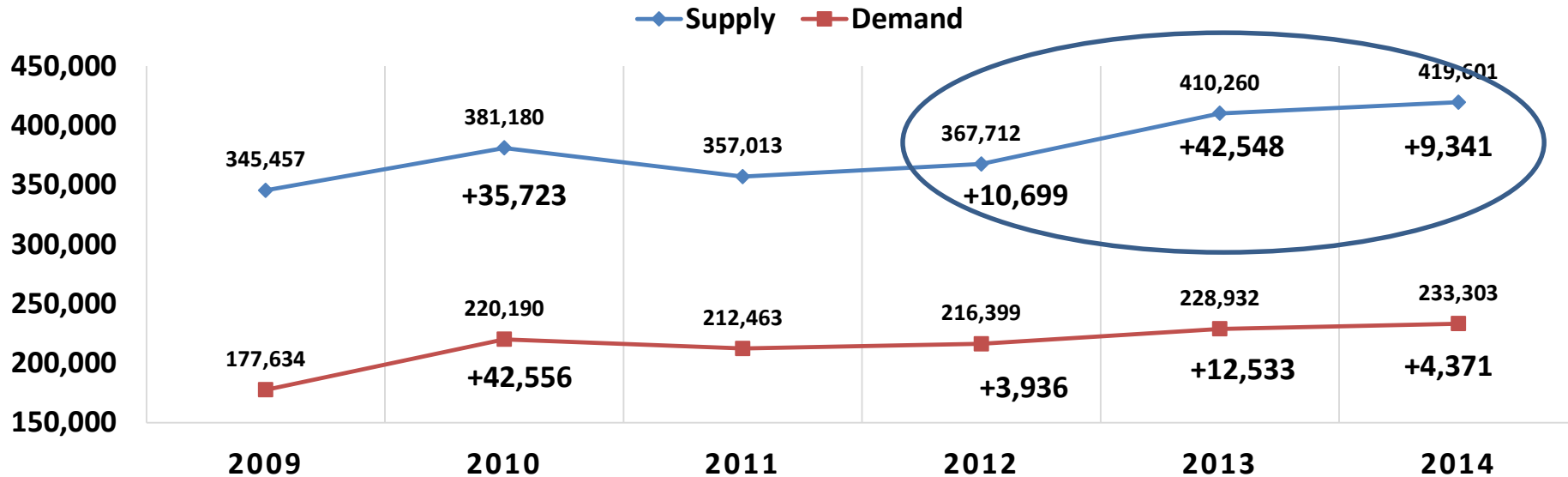
Ontario hotel/motel lodging inventory consists of approximately 30 hotel/motel properties with 1,709 rooms that are open year-round. A total of 15 hotel/motel properties representing 1,286 rooms participated in the survey, representing an overall hotel response rate of 75.3%. This response rate is excellent and considered to be a highly predictive sample of the overall market based on the geographic distribution. The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).

2015 Hotel/Motel Inventory	2015 Geneva	2015 Victor	2015 Canandaigua	2015 Other	Total Properties
TOTAL	564	506	397	242	1,709
# of Properties	9	6	9	6	30
% of Inventory	33.0%	29.6%	23.2%	14.2%	100.0%

Ontario County Hotel/Motel Lodging - Area / Era7		Open	Rooms
<u>Geneva – 9 properties = 33.0% of total inventory</u>			564
Geneva On The Lake	5 B&Bs, 16 rooms	Jun-11	30
Belhurst Castle /		Jun-75	14
America's Best Value Inn – Geneva		Jun-76	78
Days Inn		Mar-88	60
Ramada Inn		May-97	148
Belhurst Vinifera Inn & White Springs Manor		Oct-03	33
Hampton Inn – Geneva		Jun-05	55
Microtel Inn & Suites		Dec-09	69
Holiday Inn Express & Suites Geneva		Aug-14	77
<u>Victor – 6 properties = 29.6% of total inventory</u>			506
Royal Inn		Jun-71	24
Microtel Inn & Suites		Oct-94	94
Hampton Inn		Apr-98	123
Holiday Inn Express & Suites – Victor		Mar-06	104
Best Western Plus Inn & Suites – Victor		Jun-08	71
Homewood Suites		Jun-09	90
<u>Canandaigua – 9 properties = 23.2% of total inventory</u>			397
Blossoms Motel	13 B&Bs, 53 rooms	n/a	16
Georgian Motel		n/a	12
Lafayette Inn		Jun-50	21
Miami Motel		Jun-53	28
Inn On The Lake		Jun-70	134
Super 8 Canandaigua		Oct-98	50
The Inn at Bristol Harbour		Jun-00	31
Econo Lodge (Formerly Red Carpet Inn & Suites)		Jun-02	30
Holiday Inn Express & Suites Canandaigua		Nov-12	75
<u>Other – 6 properties = 14.2% of total inventory</u>			242
Red Carpet Inn	9 B&Bs, 37 rooms 5 in Naples, 25 rooms	n/a	34
Travelodge Farmington		Jun-62	50
America's Best Value Inn – Farmington		Jun-65	40
Manchester Inn (Formerly Scottish Inn)		Jun-65	38
Budget Inn		Jun-80	20
Comfort Inn & Suites		Apr-08	60
Total # of Properties		Rooms=	1,709

63 listings on AirBnB, some are B&B's
169 listing on VRBO, many duplicates with AirBnB

ANNUAL LODGING ROOM SUPPLY VS DEMAND



Annual Supply vs Demand Trend 2009 - 2014

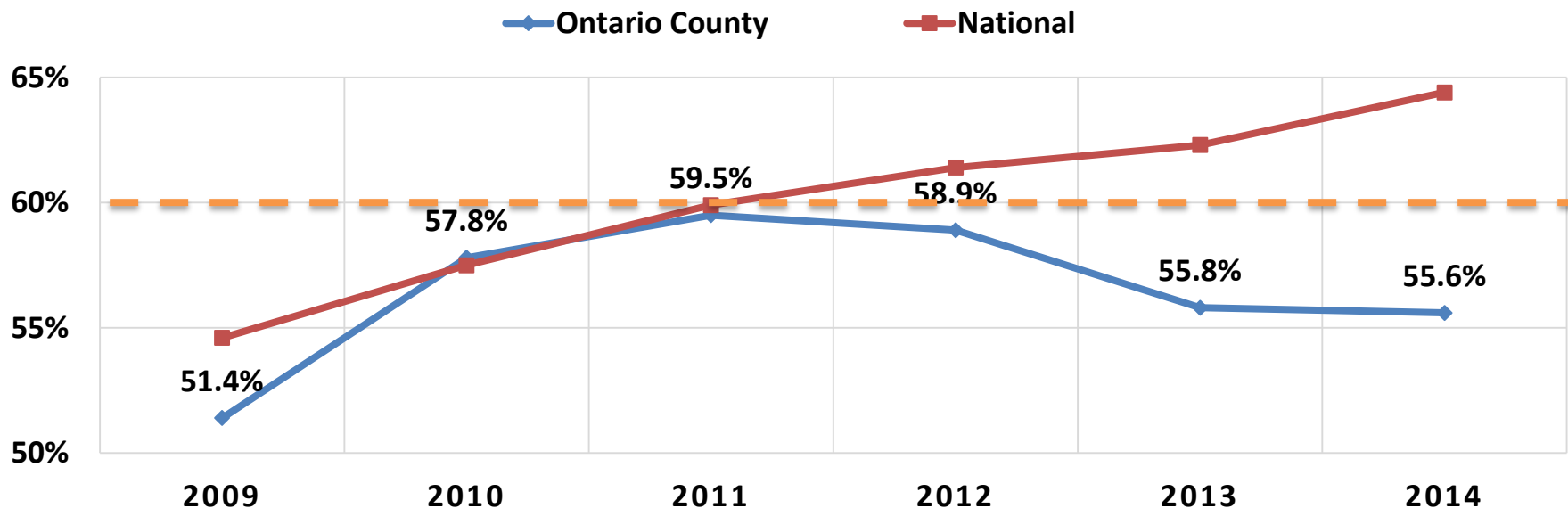
Year	Supply	% Chg	Demand	% Chg
2009	345,457	~	177,634	~
2010	381,180	10.3%	220,190	24.0%
2011	357,013	-6.3%	212,463	-3.5%
2012	367,712	3.0%	216,399	1.9%
2013	410,260	11.6%	228,932	5.8%
2014	419,601	2.3%	233,303	1.9%

Observations: 2009 to 2014

Annual supply increased 21.5% overall
Annual demand was up 31.3% 2014 compared to 2009 levels, only 6% over 2010.

- Demand working hard to keep up with additional supply.
- More room nights sold every year over year, with the exception of a slight dip in room demand in 2011.
- Most Ontario county hoteliers have solid room demand with room for growth.

ANNUAL OCCUPANCY TREND

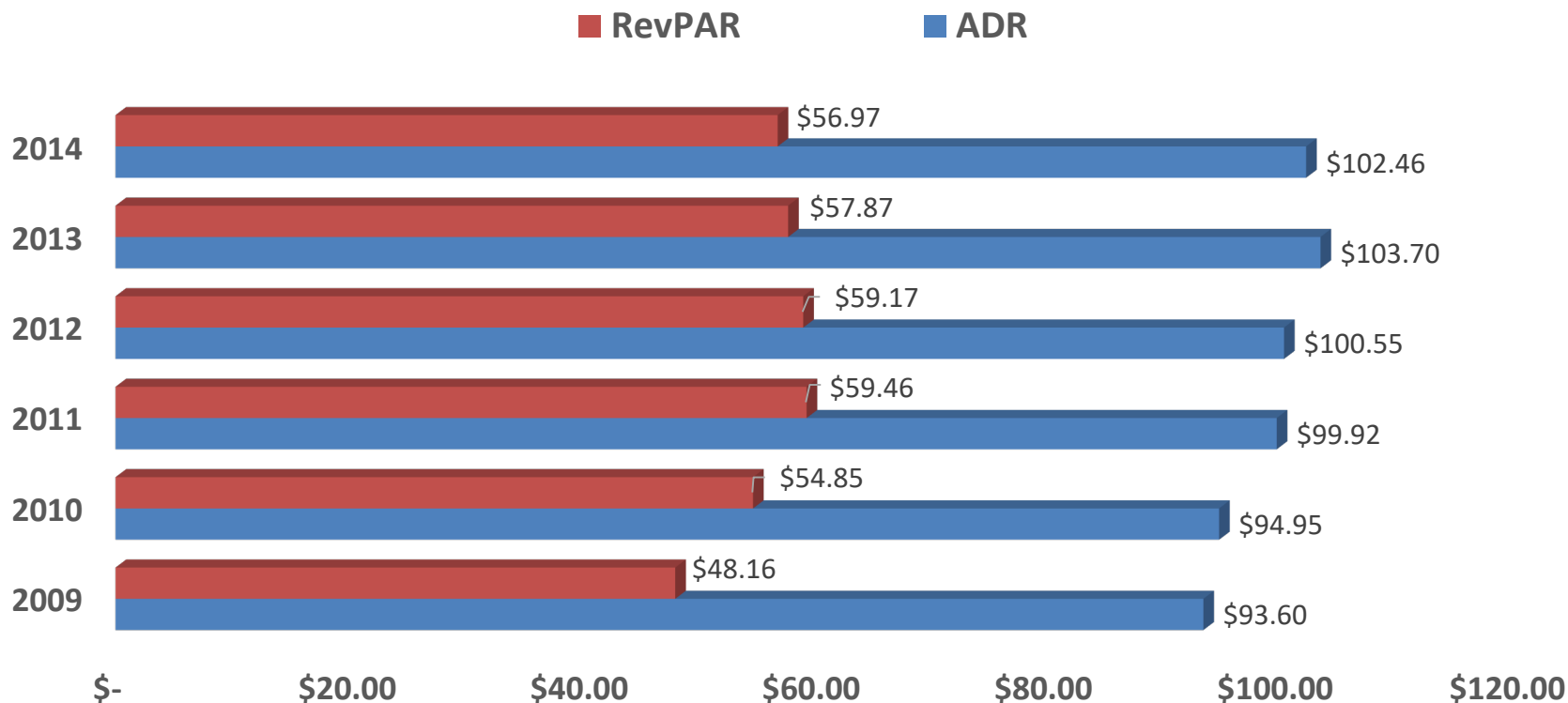


Annual Occupancy Trend 2009 - 2014				
Year	Ontario County	% Chg	National	% Chg
2009	51.4%	~	54.6%	~
2010	57.8%	12.3%	57.5%	5.3%
2011	59.5%	3.0%	59.9%	4.2%
2012	58.9%	-1.1%	61.4%	2.5%
2013	55.8%	-5.2%	62.3%	1.5%
2014	55.6%	-0.4%	64.4%	3.3%

Observations:

- Fluctuations in Ontario County's annual occupancy are a result of room demand working hard to keep pace with increases in room supply in 2009, 2012 and 2014.
- Room demand has increased every year since 2011.

Source: Ontario County STR-participating data



Annual ADR vs RevPAR Trend 2009 - 2014

Year	ADR	% chg	RevPAR	% chg
2009	\$ 93.60	~	\$ 48.16	~
2010	\$ 94.95	1.4%	\$ 54.85	13.9%
2011	\$ 99.92	5.2%	\$ 59.46	8.4%
2012	\$ 100.55	0.6%	\$ 59.17	-0.5%
2013	\$ 103.70	3.1%	\$ 57.87	-2.2%
2014	\$ 102.46	-1.2%	\$ 56.97	-1.6%

Observations:

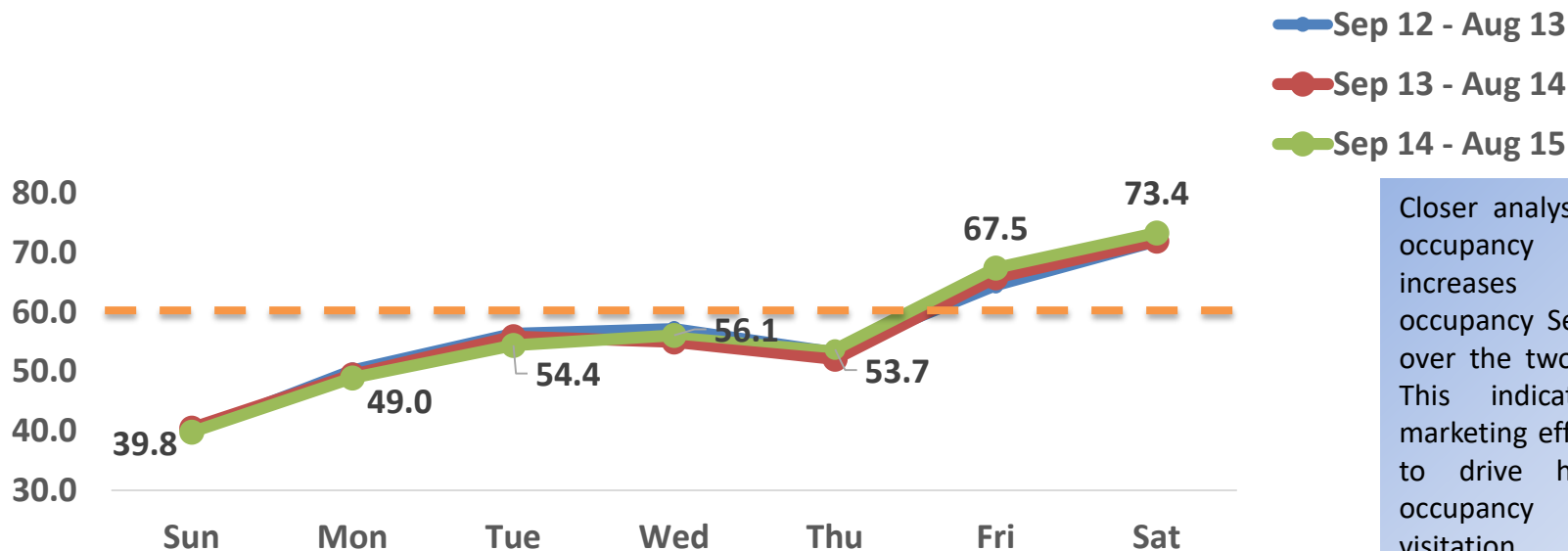
- Hoteliers have increased room rates each year since 2009 with exception of slight dip in 2014.
- Growth in room supply has outpaced growth in room demand since 2011 thus RevPAR has declined slightly during the same period.

Source: Ontario County STR-participating data

Three Year Occupancy (%)

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Year
Sep 12 - Aug 13	39.9	50.3	56.5	57.3	53.3	64.5	71.9	56.3
Sep 13 - Aug 14	40.5	49.5	55.9	55.0	52.1	65.9	72.0	55.8
Sep 14 - Aug 15	39.8	49.0	54.4	56.1	53.7	67.5	73.4	56.2
Total 3 Yr	40.1	49.6	55.6	56.1	53.1	65.9	72.4	56.1

Ontario County - 3-Year Occupancy Trend

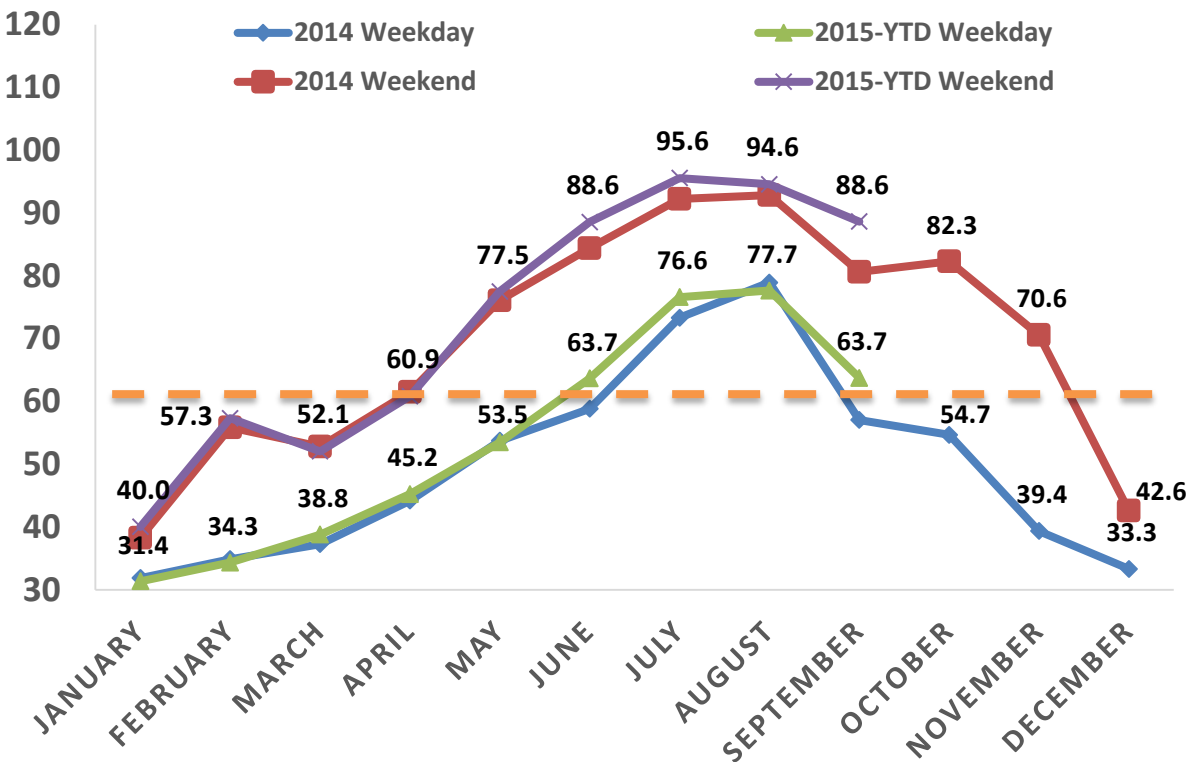


Closer analysis of the 3-year occupancy trend shows increases in weekend occupancy Sept 14 – Aug 15 over the two previous years. This indicates the FLVC marketing efforts are working to drive higher weekend occupancy in leisure visitation.

Observations:

- Weekend occupancy typically outpaces weekday occupancy.
- Business transient travel peaks on Tuesday and Wednesday. This data confirm the findings in the YSI lodging survey where hoteliers reported 26% in business transient and 35% in group/conference/meeting travelers. Weekday occupancy is lowest providing an opportunity for growth in business travel and small meetings.

WEEKDAY VS WEEKEND OCCUPANCY



	2014 WEEK- DAY	2014 WEEK- END	2015 WEEK- DAY	2015 WEEK- END
January	31.9	38.3	31.4	40.0
February	34.9	55.9	34.3	57.3
March	37.3	52.8	38.8	52.1
April	44.2	61.5	45.2	60.9
May	53.7	76.1	53.5	77.5
June	58.8	84.4	63.7	88.6
July	73.3	92.2	76.6	95.6
August	78.9	92.9	77.7	94.6
September	57.0	80.6	63.7	88.6
October	54.7	82.3		
November	39.4	70.6		
December	33.3	42.6		

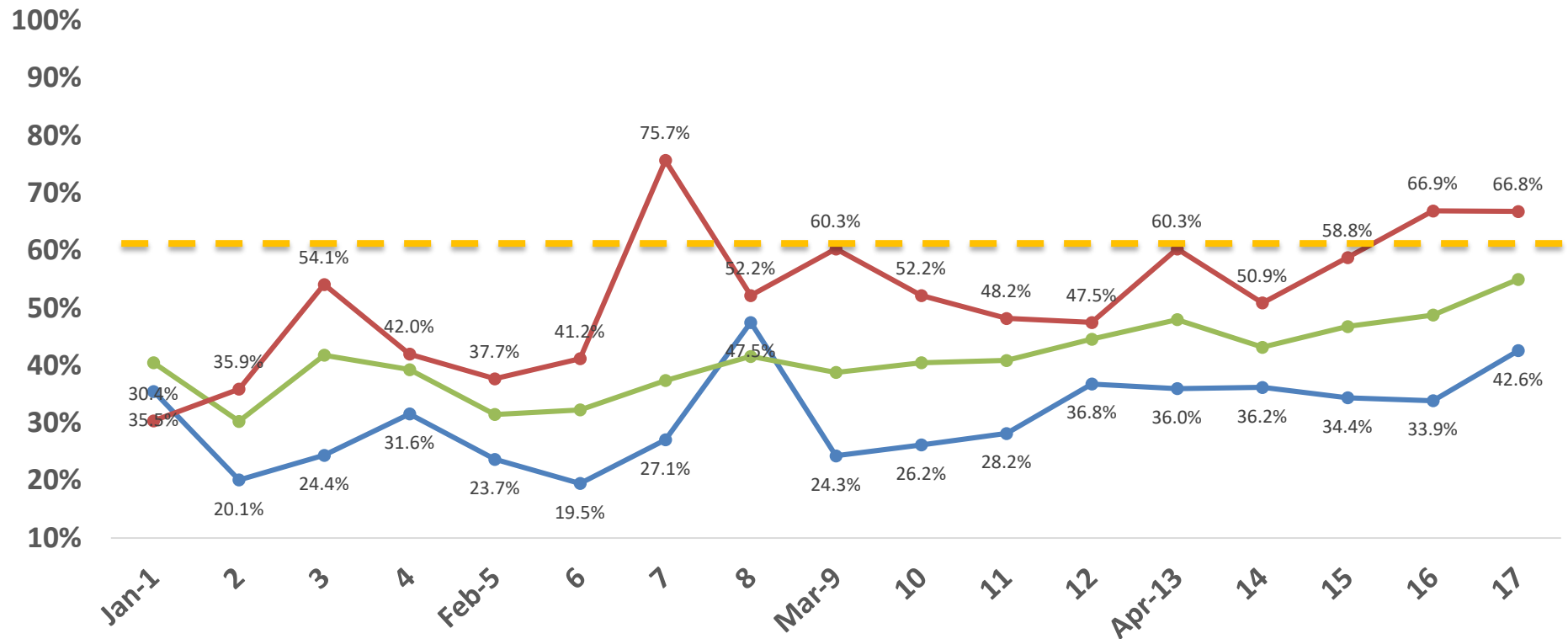
Source: Ontario County STR-participating data

Observations:

- Weekend occupancy typically outpaces weekday occupancy.
- Weekend occupancy exceeds 70% May – November.
- Weekday occupancy exceeds 70% in July and August.
- NEED PERIODS: December – March weekends and weekdays every month except July & August

2015 January - April Weekly Occupancy Trend

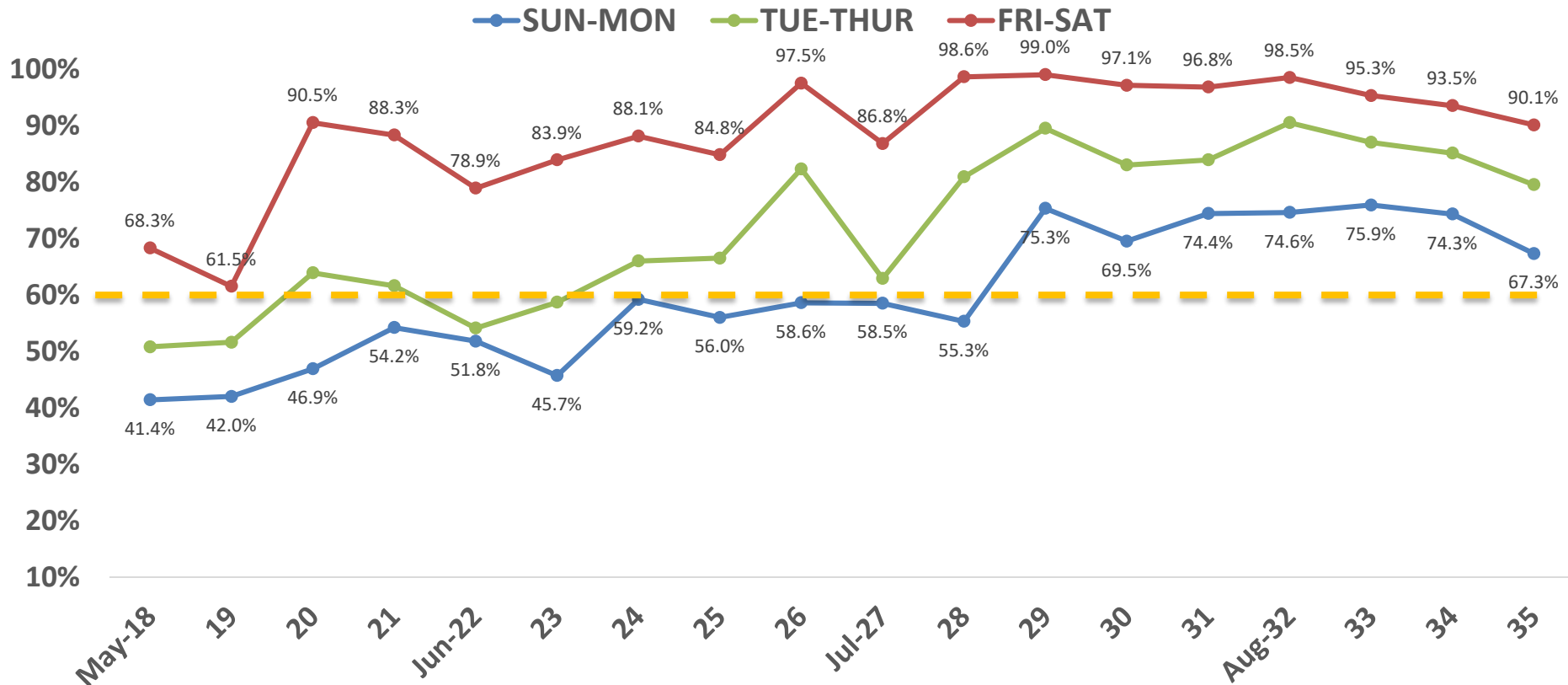
—●— SUN-MON —●— TUE-THUR —●— FRI-SAT



Observations:

- January is a low occupancy month with no week or individual day within the week exceeding 54%.
- February hits a high point with the Valentine's Day weekend driving weekend visitation.
- March/April begin to see some momentum with weekend occupancy reaching in the high 50's and 60's percentages; more than likely some of the Ontario County winter recreation contributing to these levels.

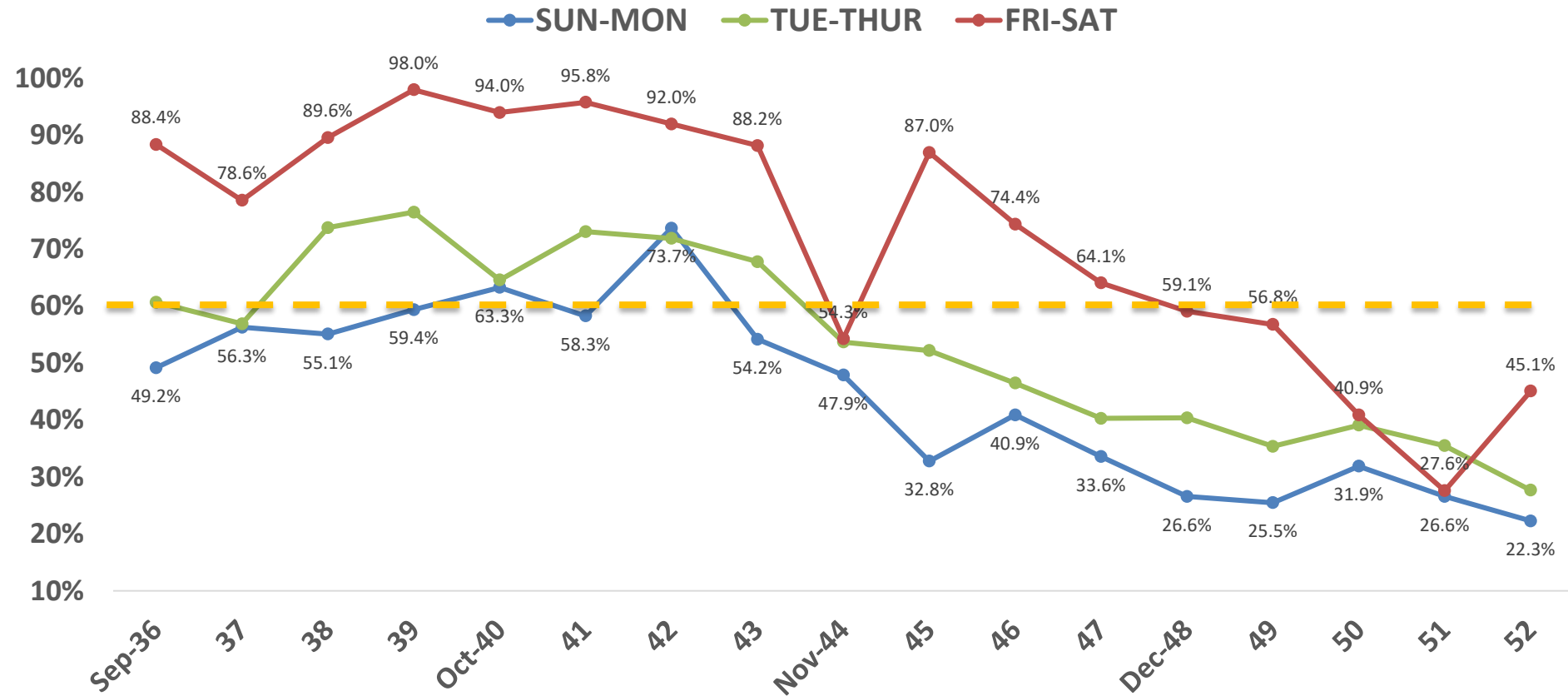
2015 May - August Weekly Occupancy



Observations:

- Daily occupancy levels are consistently higher May – August., over the months of January – April. Mid-week and weekend occupancy percentages rarely dips below 60% May – August.
- Summer is definitely a peak season with mid-week and weekend occupancy consistently in the 80% - 90%.
- Lodging market has very little room for growth in room demand during this time period.

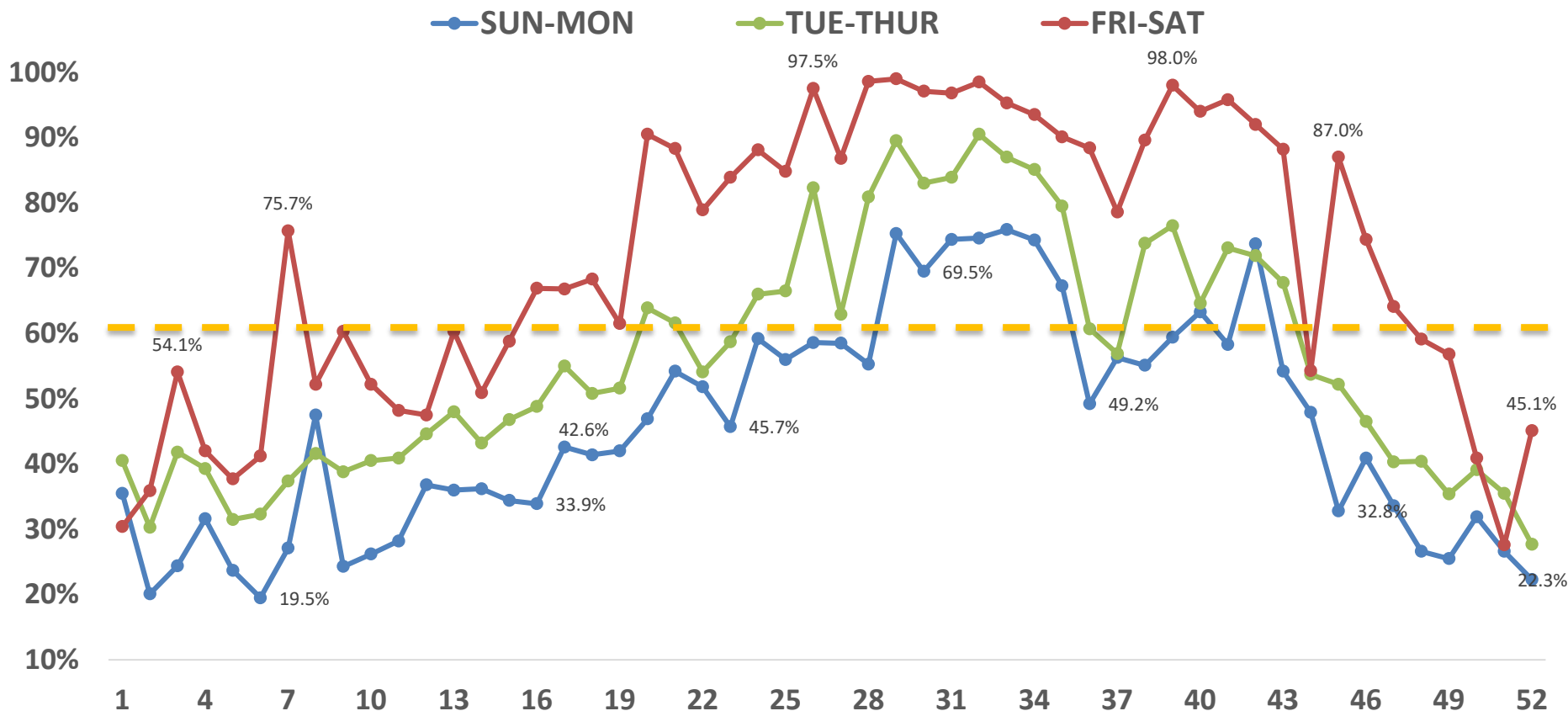
2015 September/October – 2014 November/December Weekly Occupancy



Observations:

- Leaf season driving high occupancy levels on the weekends in September and October. Some room for growth Sunday – Thursday for business travelers and small meetings.
- Marketing promotions create high weekend room demand in much of November which can typically be difficult to sell.
- Sunday through Thursday remains below 60% November and December.

Ontario County 52-Week Occupancy Trend



DAILY OCCUPANCY PERCENTAGES:

- # of days above 60% = 67 (18.4% of the year)
 - # of days above 70% = 43 (11.8% of the year)
 - # of days above 80% = 42 (11.5% of the year)
 - # of days above 90% = 42 (11.5% of the year)
- TOTAL of days 60% or higher occupancy = 194 (53.2% of the year)**

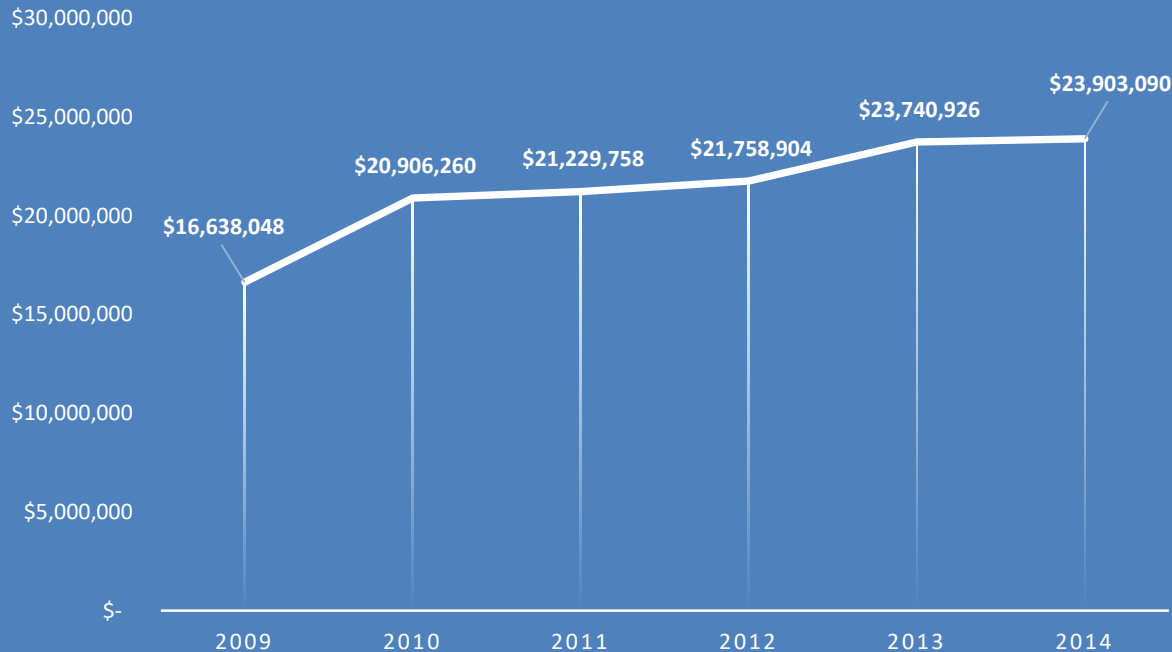
Source: Ontario County STR-participating data

Year	Revenue
2009	\$ 16,638,048
2010	\$ 20,906,260
2011	\$ 21,229,758
2012	\$ 21,758,904
2013	\$ 23,740,926
2014	\$ 23,903,090

Hotel/Motel 6-YR Trend Ontario County STR Revenue

Smith Travel Research reports the total annual lodging revenue generated by the STR-participating Ontario County lodging properties over the 6-year period, 2009 – 2014 as follows in the graph to the right. This data shows Ontario County STR-participating properties experienced significant growth over this 6-year period 2009 - 2014; this growth in revenues can be attributed to increases in room supply, nights sold as well as increased room rates.

STR-PARTICIPATING PROPERTIES REPORTED REVENUE



This equates to an overall growth in lodging room revenue of 44% when comparing 2014 to 2009. The FLVC and their lodging partners must be given credit for their combined marketing efforts and team work driving overnight visitation. Job well done Ontario County!

Source: Ontario County STR-participating data

Source: YSI survey of Ontario County hotels

Ontario County Lodging Market Segmentation

2014	2011	Market Segmentation
65.0%	66.8%	Transient & Other
39.2%	28.3%	Leisure Transient
25.6%	37.5%	Business Transient (individual business travelers and skilled workers)
0.2%	1.0%	Other
35.0%	33.2%	Group/Conference/Meeting
16.8%	12.6%	Weddings / reunions / family events / social events
5.3%	6.5%	Recreational outdoor activities
4.6%	3.1%	Group Tour
4.4%	5.2%	Team sports
3.9%	5.8%	Corporate

Source: YSI survey of Ontario County hotels

Observations:

- Congratulations, Ontario County IS a leisure destination at 39% of all rooms occupied.
- Business transient has declined since 2011 and must be offset by driving increases in weekday leisure & group.

Leisure Feeder Markets

Feeder Market	1 st	2 nd	3 rd	4 th	2015 Overall Responses
Albany	3	1	0	1	5
Buffalo	2	1	1	1	5
New York	2	0	1	2	5
Toronto	1	2	0	1	4
Rochester	1	1	1	0	3
Syracuse	0	2	1	0	3
Canada	2	0	0	0	2
Victor	2	0	0	0	2
Pittsburgh	0	2	0	0	2
Canandaigua	0	1	0	1	2
Ontario	0	1	0	1	2

Hoteliers were asked to rank the top four leisure feeder markets for their hotel/motel property. The following markets were identified by 15 of the hotel/motel respondents as the top leisure feeder markets. Top leisure markets identified for Ontario County continue to be within the 4 – 6 hour drive market.

Future Sales & Marketing Efforts

Group Market Segment	Rank Order	Rank Average
Corporate	1	1.60
Leisure	2	2.73
Group Tour/Motorcoach	3	3.20
SMERF	4	3.53
Weddings/Reunions/Social	5	4.23
Team Sports	6	4.93

Having established the current market segmentation for those staying in Ontario County lodging., YSI asked the lodging property managers to indicate in rank order what markets they would like the FLVC to target for future growth. The prioritized ranking for future direct sales efforts by FLVC is shown in the table below as provided by the lodging properties that responded to this question.

Source: YSI survey of Ontario County hotels

Hoteliers were asked to provide any insight into major shifts or changing trends in room night sales in Ontario County over the last year. Verbatim responses are below:

Major shifts or changing trends in room night sales you have noticed over the last year

- Canadian visitors have disappeared; Canadian shoppers come but not as often.
- One thing that has changed in the last few years is that with the new cell phones a lot of people are waiting until they get into an area and looking to see who has rooms and who has the best rate. Also the Canadian travel is down mainly due to the exchange rate. We have seen an uptick in motorcoach business also. Corporate business has started to come back, however as new hotels have opened everybody is competing for that business and ADR has dropped.
- Increase in 3rd party bookings- hotels.com or booking.com etc.
- We have noticed the booking window has shortened immensely and we aren't sure why. But guests are making their travel plans last minute.
- Less Canadian tourists this year
- Since the renovation we have seen more corporate travel and higher end businesses.
- Large growth in leisure segment resulting in historical revenue.

Hotel/Motel Future Sales and Marketing Suggestions for Ontario County

- Seneca Culture & Arts Center
- Business is needed more in the winter/spring-(November-April).
- Canadian exchange rate currently that business is off somewhat. Also more motorcoaches.
- Keep up the great work! We appreciate all you do!
- Any efforts around bringing groups & travelers to the region in the off Peak (Late October - Early May). Maybe some special holiday efforts to Canadian groups or increased Tournaments in the off peak - correspond with Rochester though so there aren't conflicting dates since there are still some busy dates mixed into the off peak months.
- Just more awareness for some of the other hotels outside of Canandaigua. Just seems like those hotels are plugged a little more than others.
- Mention our completely remodeled rooms!
- Less on tour busses, more on SMERF w/ pinnacle unless combined.

Lodging Research Summary

- Weekends outpace weekdays throughout the year. Summer weekends have the highest occupancy
- Sundays & Mondays are the lowest occupancy nights.
- Tuesday – Thursday nights remain below 60% occupancy 6 months of the year (January – April, November – December).
- Leisure weekend market is maxed out in peak season which requires shift to weeknights focus.
- Increase corporate small meetings group sales efforts focusing on New York State.
- Closer partnership with hotels on group sales strategy focusing on weeknights and November – April.





Finger Lakes
Visitors Connection
Ontario County, NY
visitfingerlakes.com



Visitor Survey

Purpose

To document the profile and planning preferences of those who visit Ontario County, NY. The online survey captures the perceptions of Ontario County as a destination, and the attractors that induce day trips, overnight visits, multiple night-stays, and repeat visitation.

Methodology

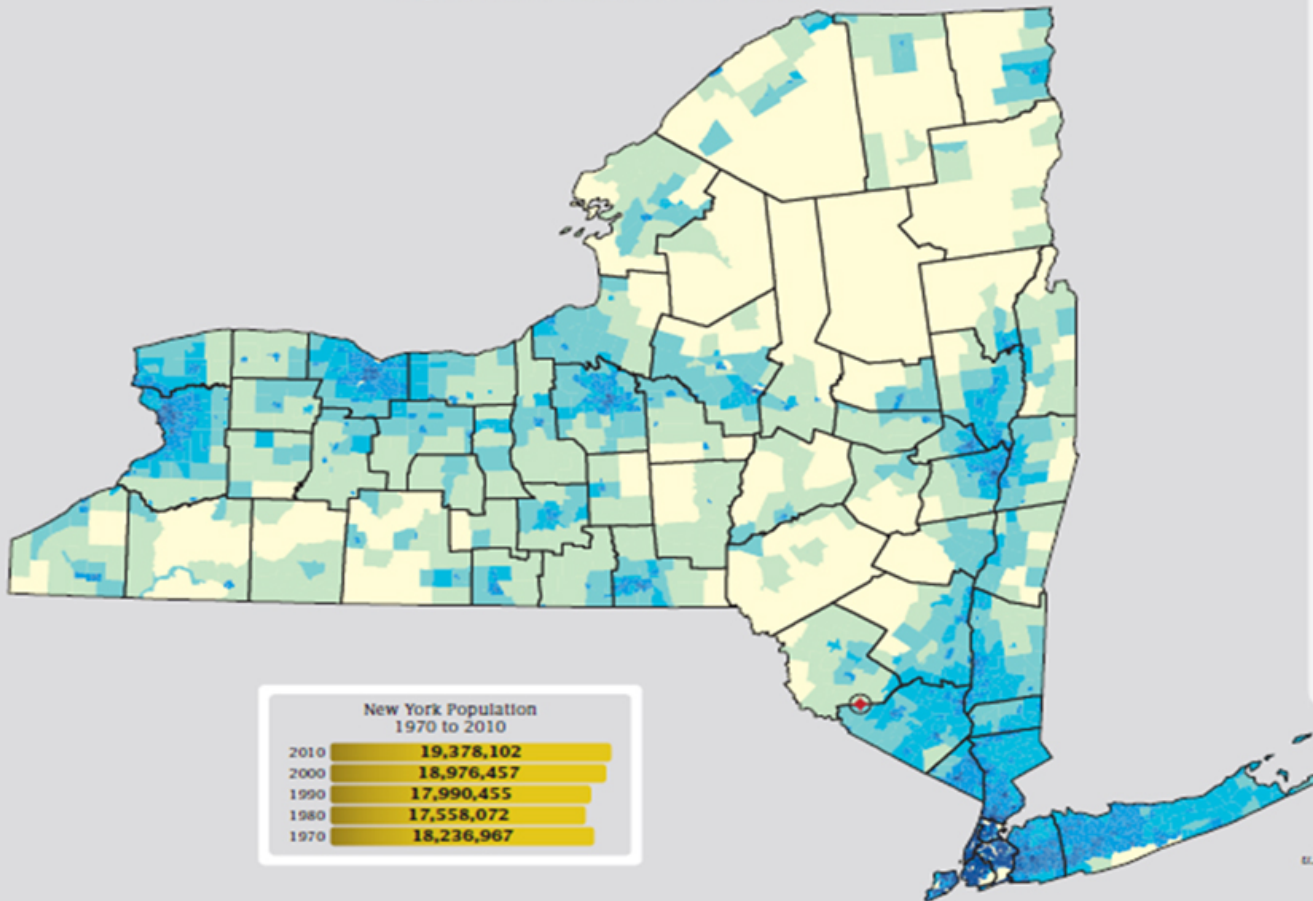
An online survey instrument was prepared by the YSI research team and approved by FLVC to capture visitor perceptions of Ontario County (Finger Lakes), NY. Travel industry partners in Ontario County were provided unique web-links to the online visitor survey that were emailed to their visitor databases. Email recipients were invited to take an Ontario County (Finger Lakes) visitor survey and be entered into a chance to win a grand prize of a weekend in Ontario County or (1 of 5) \$100 gas cards. Total surveys that were received through weblinks that were posted or emailed by FLVC and travel partners are as follows:

Number of surveys completed totaled 2,686, with 294 completed by residents, 337 completed by residents of neighboring counties and 1,778 respondents identified as visitors to Ontario County.



2010 Census: New York Profile

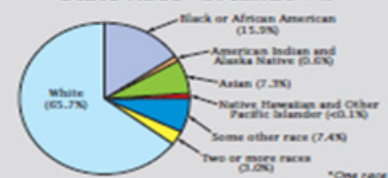
Population Density by Census Tract



New York Population 1970 to 2010

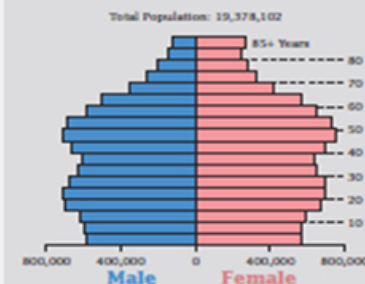
2010	19,378,102
2000	18,976,457
1990	17,990,455
1980	17,558,072
1970	18,236,967

State Race* Breakdown

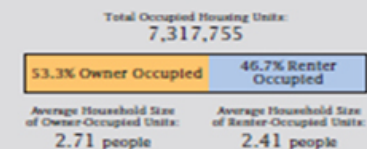


Hispanic or Latino (of any race) makes up **17.6%** of the state population.

Population by Sex and Age



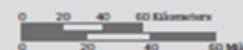
Housing Tenure



People per Square Mile by Census Tract



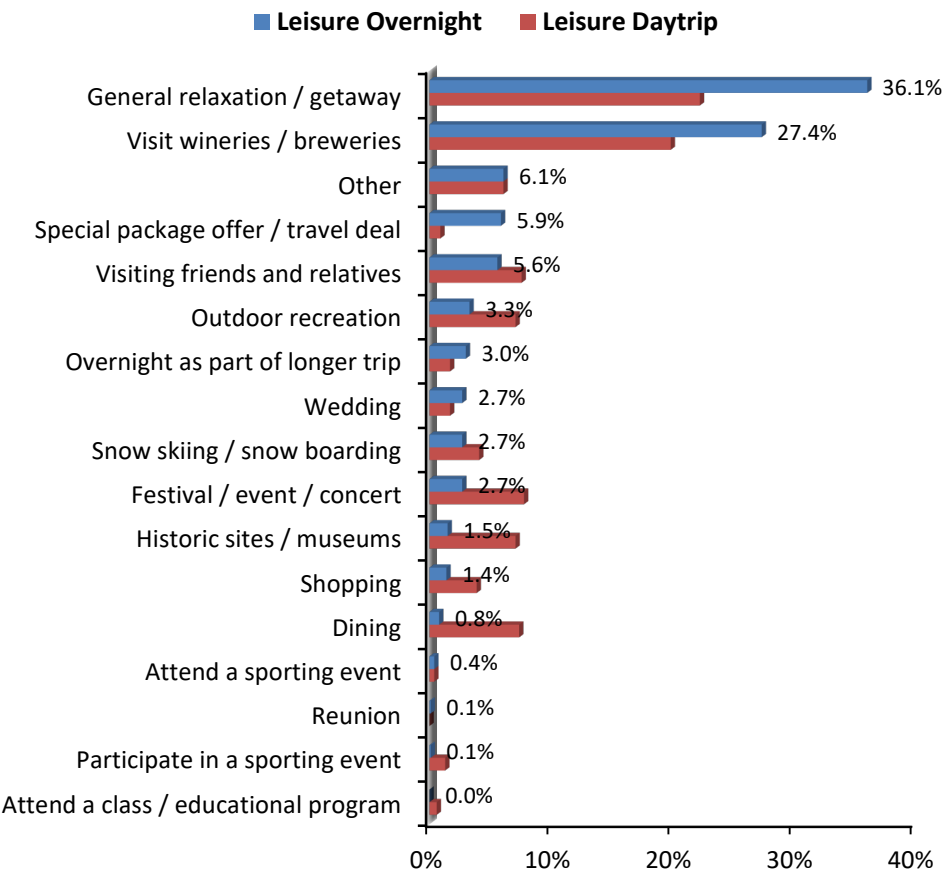
County Boundary
New York Mean Center of Population



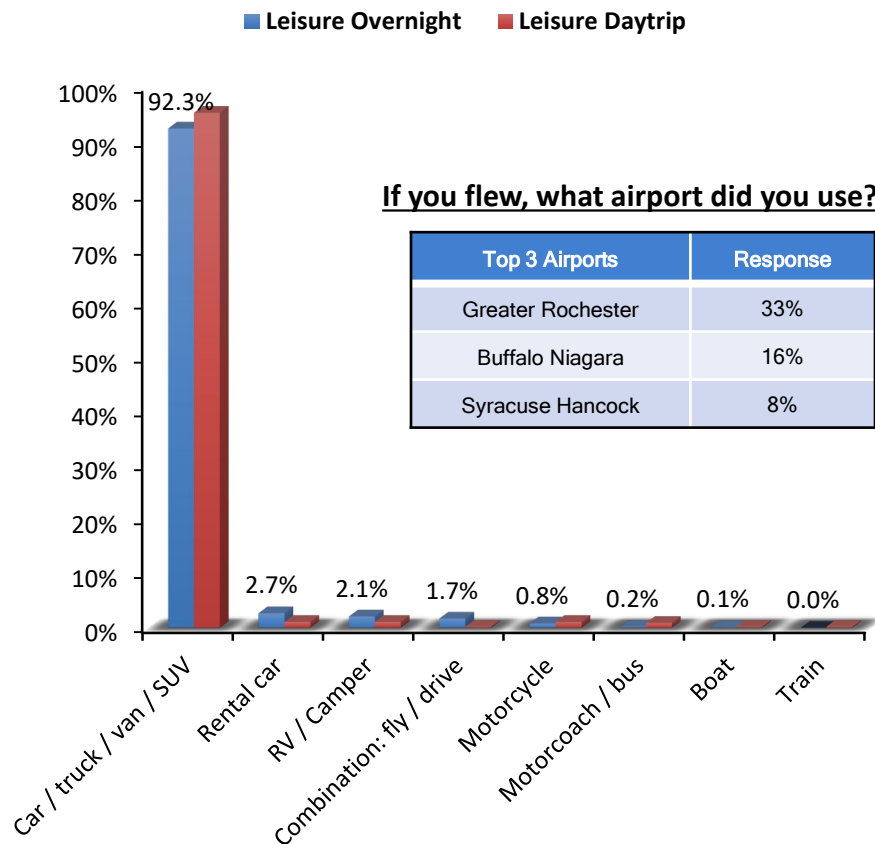
Survey Respondent Demographics

Demographics	Leisure Overnight 2015	Leisure Daytrip 2015	Leisure Overnight 2012	Leisure Daytrip 2012
Average Age	54.1	52.4	50.7	46.6
Generational Group				
Generation Y (9 – 28)	2.1%	2.1%	N/A	N/A
Generation X (29 – 49)	28.1%	36.3%		
Baby Boomer (50 – 67)	59.6%	52.6%		
Silent Generation (68 – 85)	10.2%	9.1%		
Gender				
Female	65.3%	74.1%	65.0%	68.1%
Male	34.7%	25.9%	35.0%	31.9%
Occupation	Retired – 23.7% Healthcare Industry – 16.1% Education – 10.3% Professional/Technical – 9.5%	Retired – 24.4% Healthcare Industry – 14.9% Education – 14.7% Professional/Technical – 8.0%	Retired – 21.5% Professional/Technical – 18.8% Education – 9.8% Manager – 7.2%	Retired – 17.7% Healthcare Industry – 15.2% Professional/Technical – 13.9% Education – 12.6%
Level of Education				
College	43.5%	44.3%	42.1%	34.8%
Graduate	29.2%	30.3%	33.4%	43.8%
Some College	16.5%	15.2%	14.0%	11.2%
Ethnicity				
White/Caucasian	93.8%	95.5%	N/A	N/A
Prefer not to answer	3.5%	2.8%		
American Indian or Alaskan	1.9%	0.9%		
Native	1.2%	0.9%		
Hispanic or Latino	1.1%	1.4%		
Asian or Pacific Islander	0.6%	0.9%		
Black or African America				

Regarding your LEISURE trip to Ontario County, what was the SPECIFIC reason for your trip?



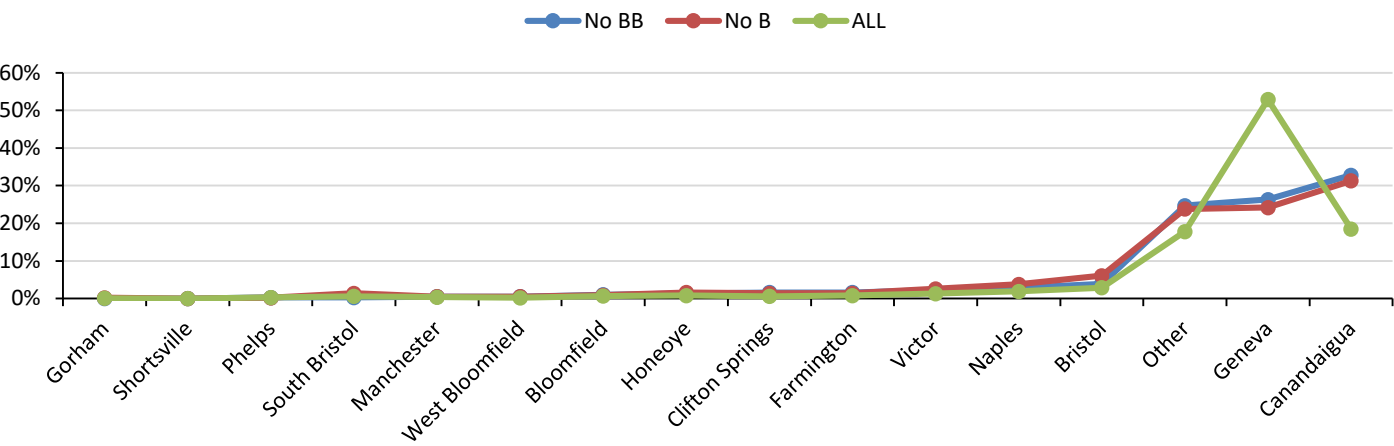
What PRIMARY mode of transportation did you use TO GET TO Ontario County on your most recent visit?



Observations:

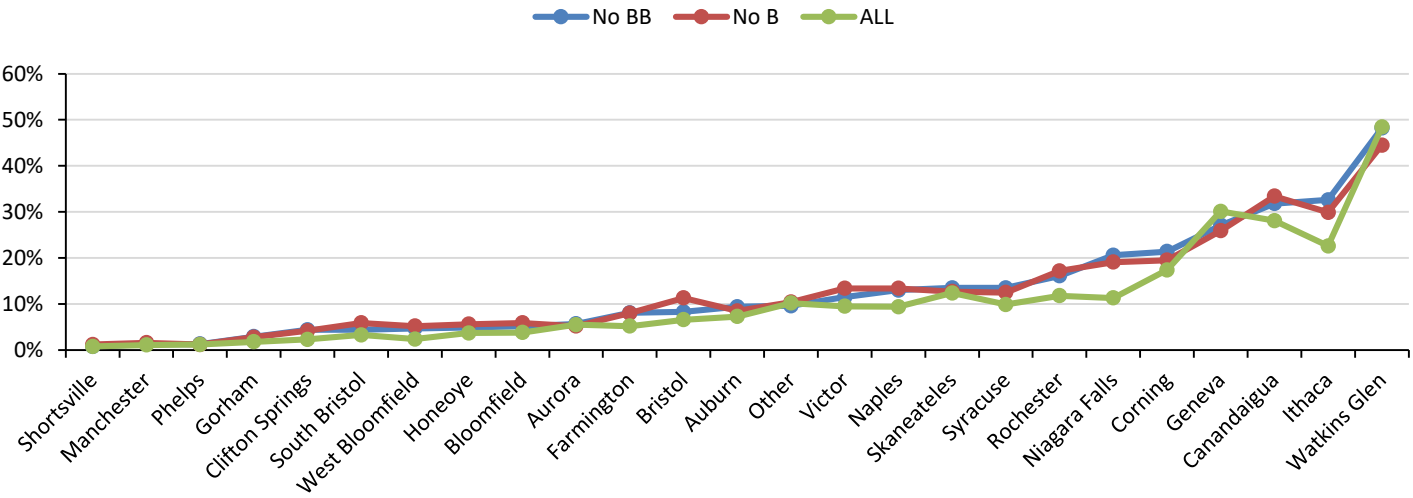
- Relaxing getaways featuring wineries/breweries, outdoor recreation and heritage are most popular among respondents.
- Ontario County is a drive destination with the vast majority of respondents arriving in their own vehicle. Less than 2% reported flying in to the area.

What community was the PRIMARY destination of your visit to Ontario County, New York?

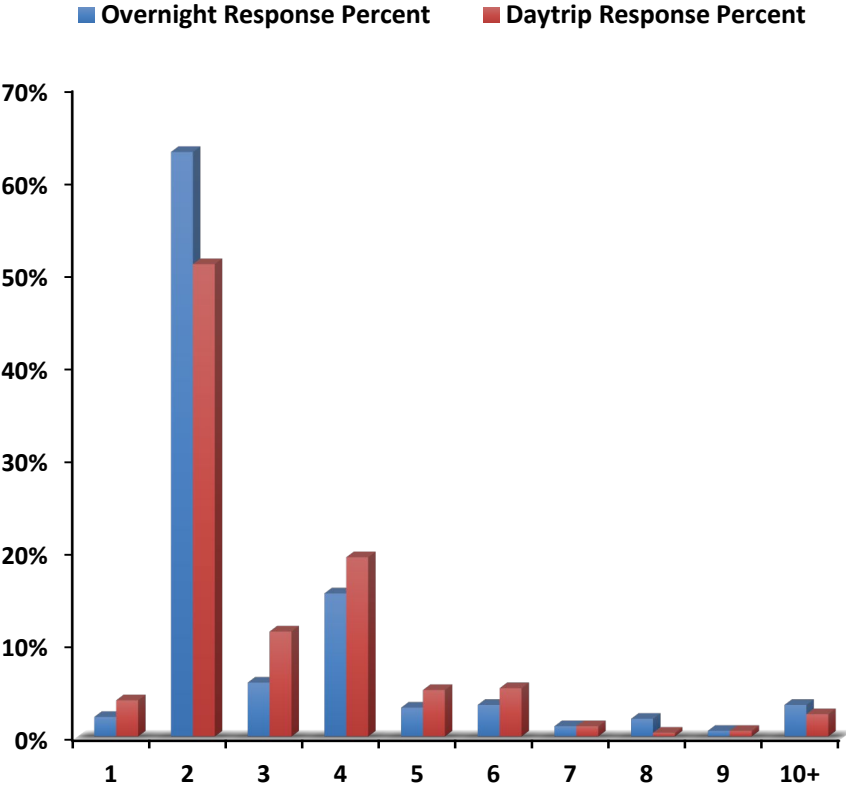


- Observations:**
- The top two primary destinations within Ontario County are Geneva and Canandaigua.
 - No BB = no Belhurst or Bristol
 - No B = no Belhurst
 - People visit many towns while in the region and cross county lines regularly.
 - The typical respondent visited 3 or more communities with very few reporting they stayed in just one community.
 - Leakage = Ontario County overnight visitors who leave the County to do activities in other counties.

What OTHER communities did you visit while in the Ontario County area?



Travel party size



Observations:

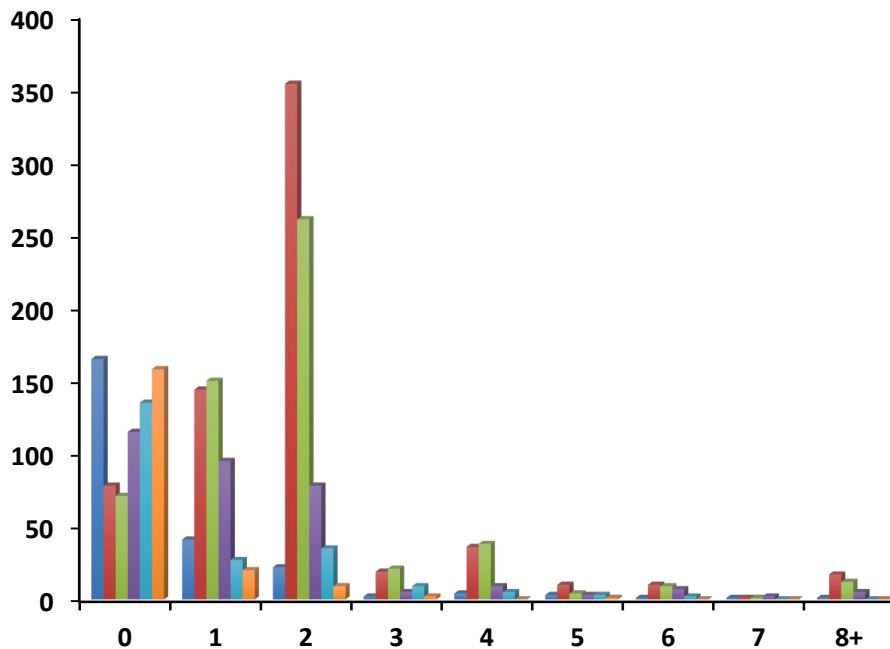
- Two people or a couple are the most typical leisure travel party.
- Two couples traveling together are the next most likely travel party.
- Business travel parties are typically one or two.



Please tell us the number of people in each age category in your travel party.

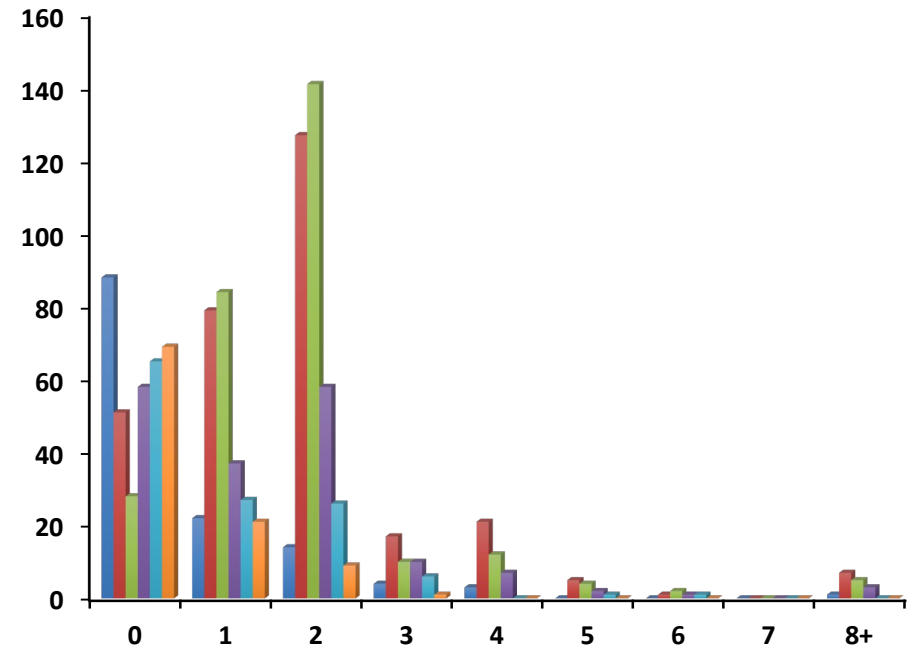
Leisure Overnight

■ Adults (73+ years old) ■ Adults (55 - 72 years old)
 ■ Adults (34 -54 years old) ■ Young adults (15 -33 years old)
 ■ Children (14 and under) ■ Pets



Leisure Daytrip

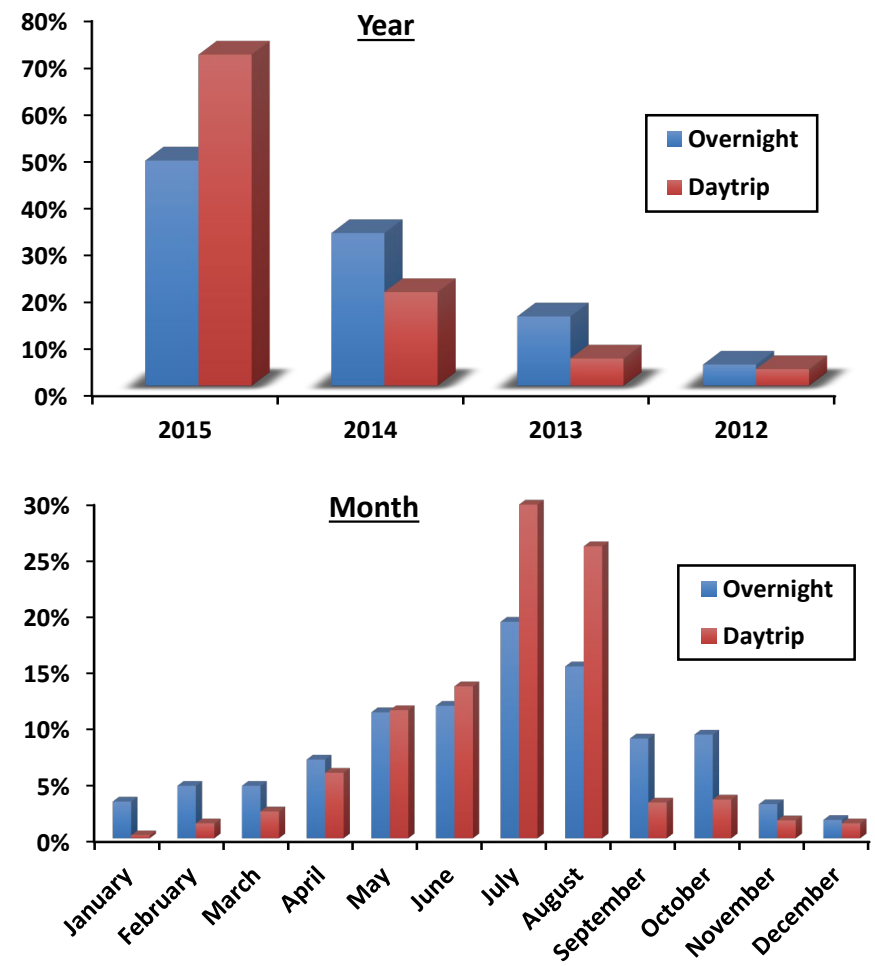
■ Adults (73+ years old) ■ Adults (55 - 72 years old)
 ■ Adults (34 -54 years old) ■ Young adults (15 -33 years old)
 ■ Children (14 and under) ■ Pets



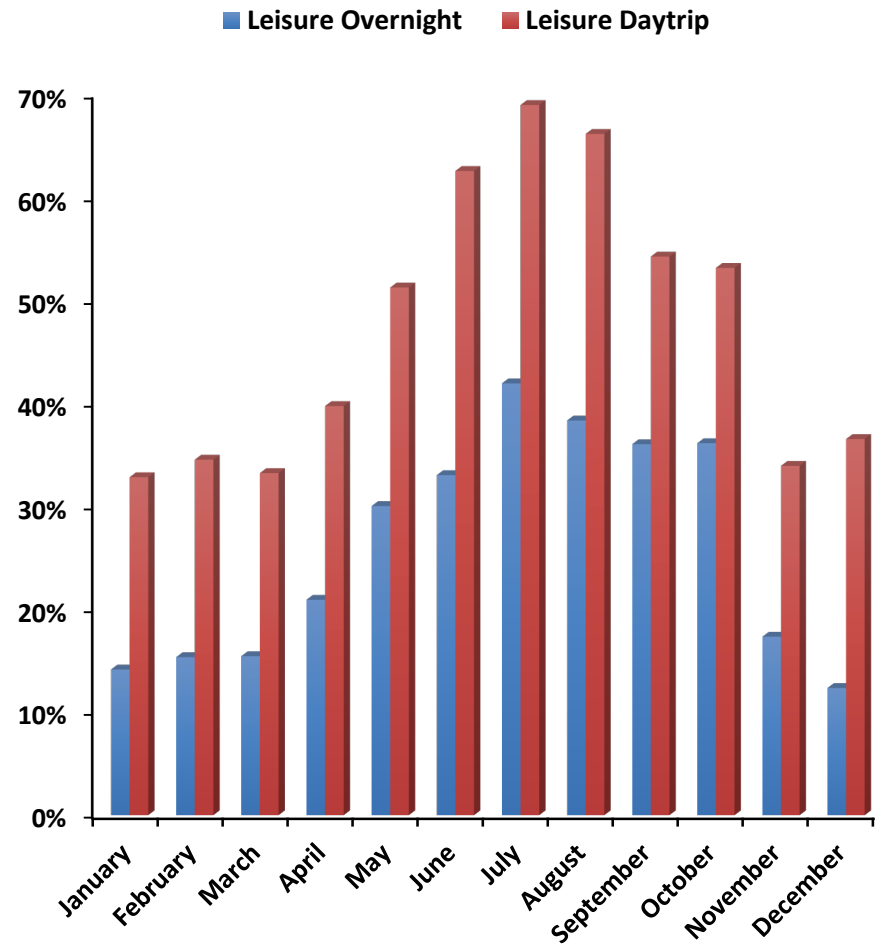
Observations:

- A deeper analysis of travel party composition reveals adults 55-72 years old are the most frequent visitors according to this survey. Encourage these travelers that are retired to visit on weekdays.
- The second most frequent travel party was adults 35 – 54 years old which are most likely to come for weekdays (outdoor sports – skiing) on weekends and holidays.
- Less than a third of all travel parties included children or young adults, those that did came for outdoor activities primarily.

Please indicate the date of your most recent visit in the last 3 years.



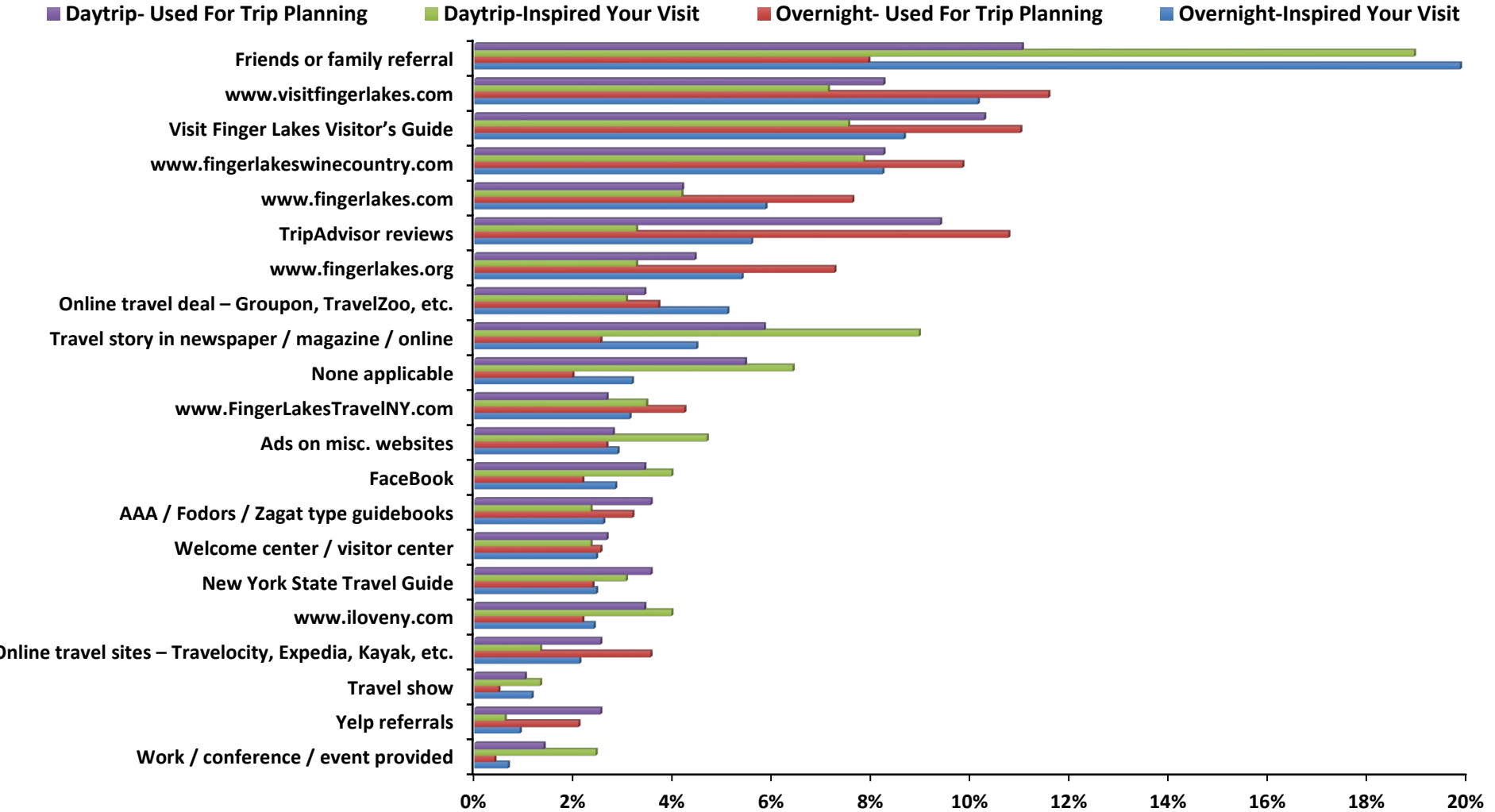
Check all the months in which you have visited Ontario County.



Observations:

- The monthly visitation pattern reported by survey respondents mirrors the lodging occupancy pattern throughout the year with a July – August peak and slower winter months.
- Winter sports drive increased demand for daytrips in the winter months depending on snow patterns.

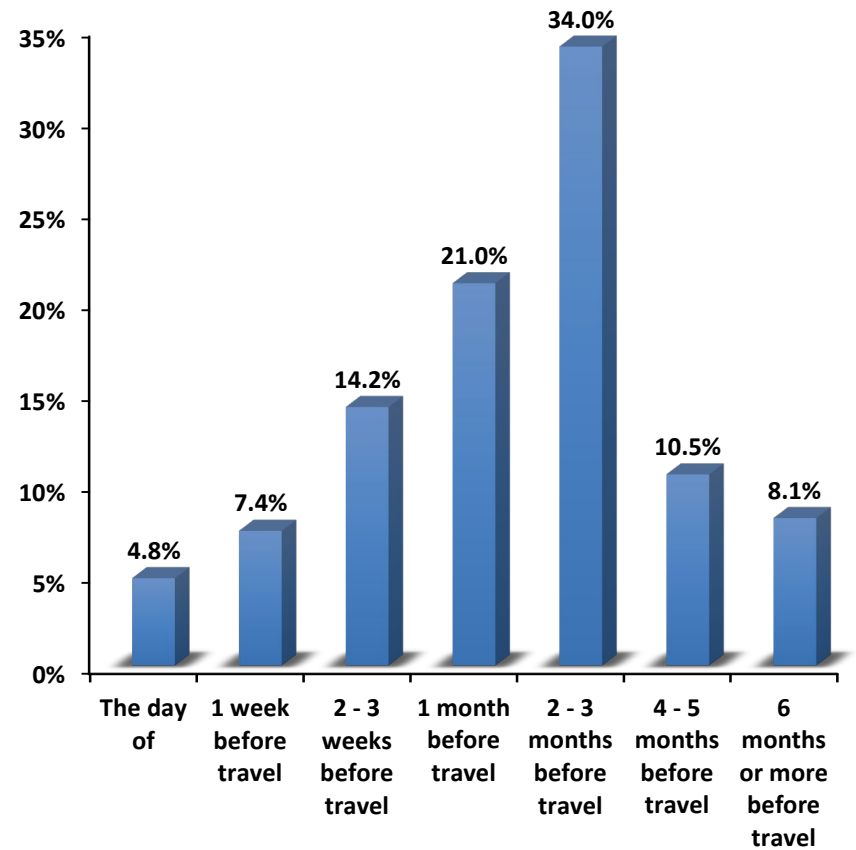
Please review the following list then tell us if each INSPIRED and/or were used for TRIP PLANNING purposes for your most recent trip to Ontario County, NY.



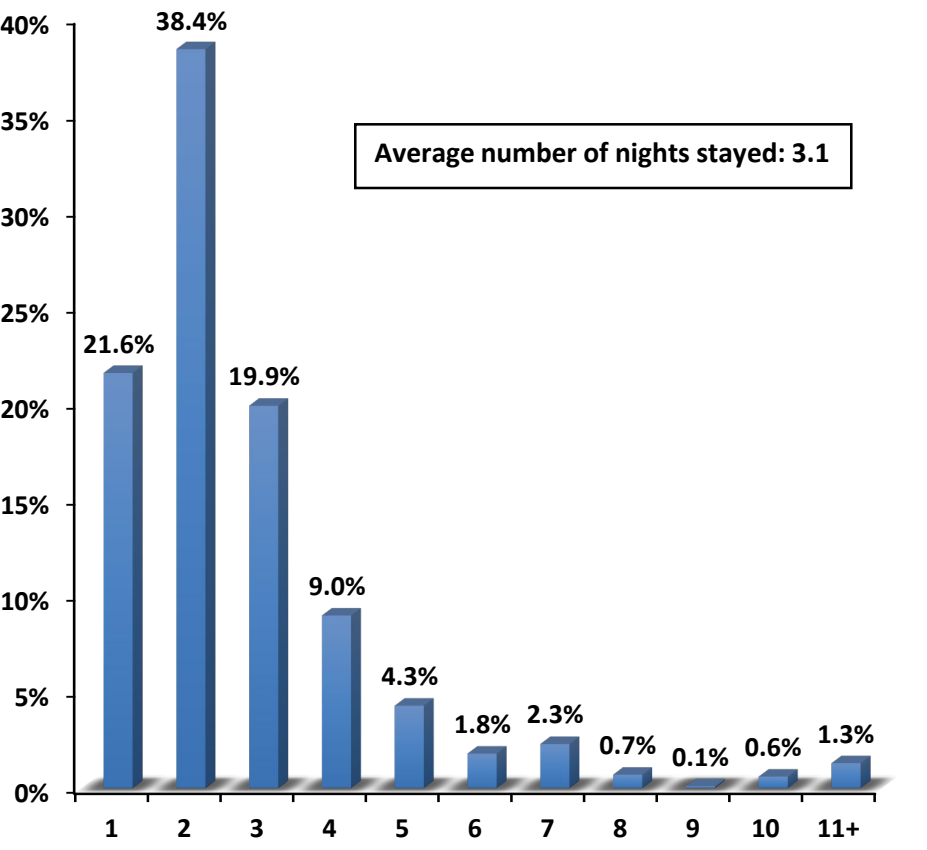
Observations:

- Referrals (high repeat visitation) are most effective to drive increased visitation. Use the referral network to inspire visits.
- Digital marketing works with websites being the most popular planning options followed by Trip Advisor, online deals & OTAs.

How far in advance did you book your accommodations for your most recent trip to Ontario County?



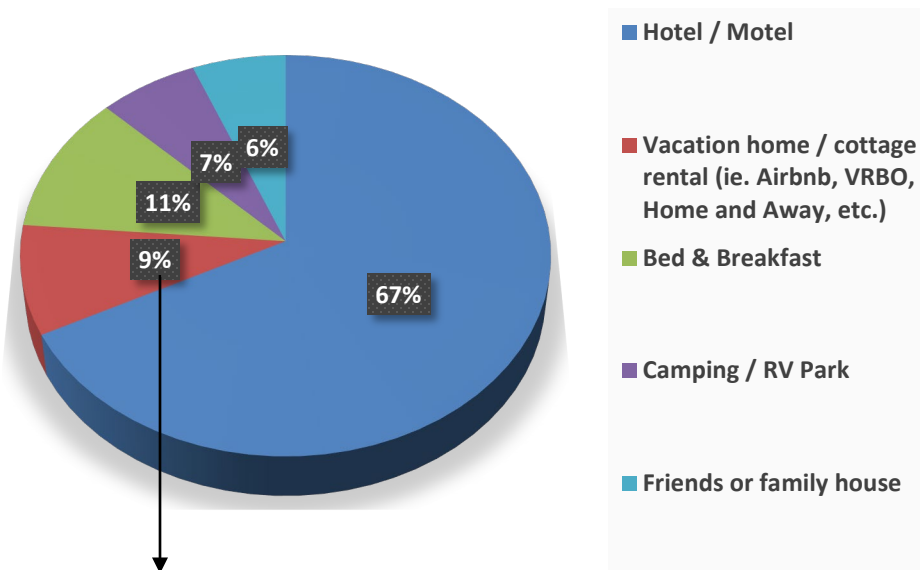
How many nights did you stay in Ontario County, New York on your most recent visit?



- Observations:**
- Slightly less than half (47%) booked their accommodations within one month of arrival. One third (34%) booked within 2 – 3 months of arrival.
 - Average length of stay for overnight visitors is 3.1 nights. Two – 3 night stays are typical.

Where did you stay during your last visit to Ontario County?

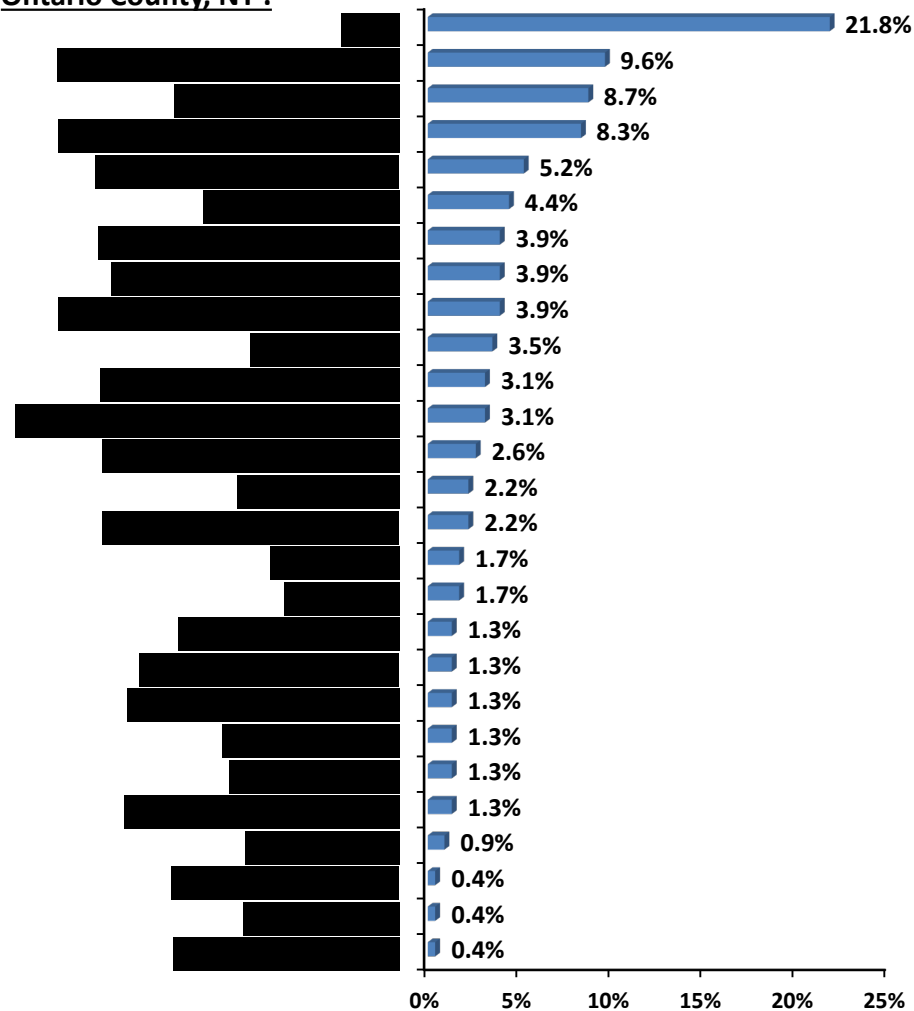
- Those coming for outdoor recreation and wineries were slightly more likely to stay in vacation rentals or unique lodging such as Inns



When selecting your accommodation, please indicate the reasons you decided to rent a vacation home/cottage.

Activities	Response %
Location	73.9%
Price / cost	66.3%
Kitchen / cooking availability	57.6%
Comfort of staying in a home vs hotel	54.3%
Access to the lake	53.3%
Additional space	48.9%
Other	14.1%

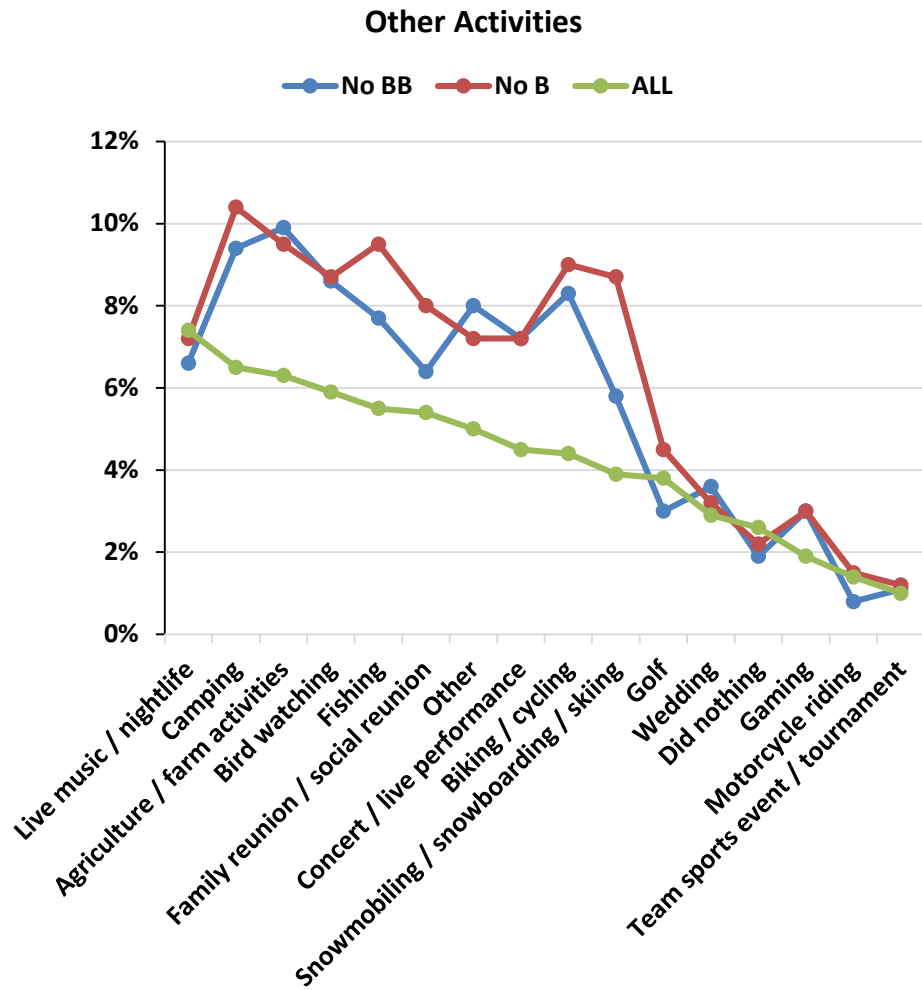
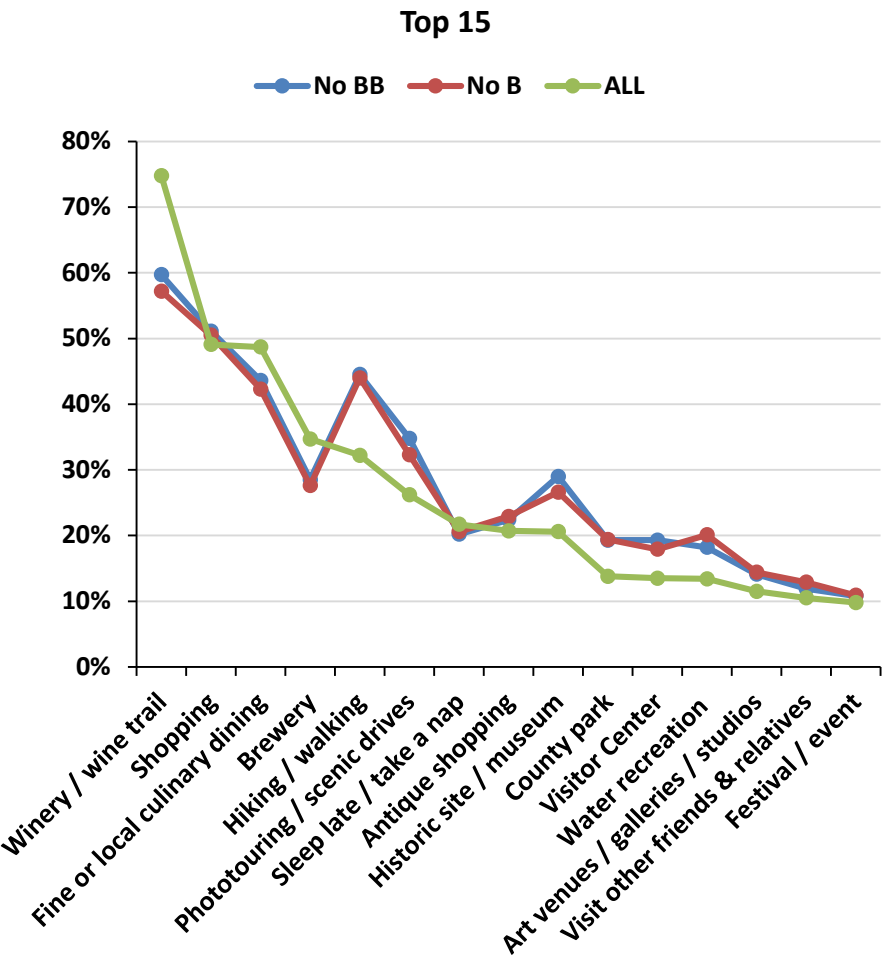
Please identify the hotel/motel where you stayed on the LAST visit to Ontario County, NY .



Observations:

- Two thirds of respondents stayed on hotel/motels, 9% in vacation homes & 11% in B&B's which make up 5% of the room inventory.
- Respondents show high interest in unique lodging.

What activities did you or a member of your travel party participate in while visiting Ontario County, New York.

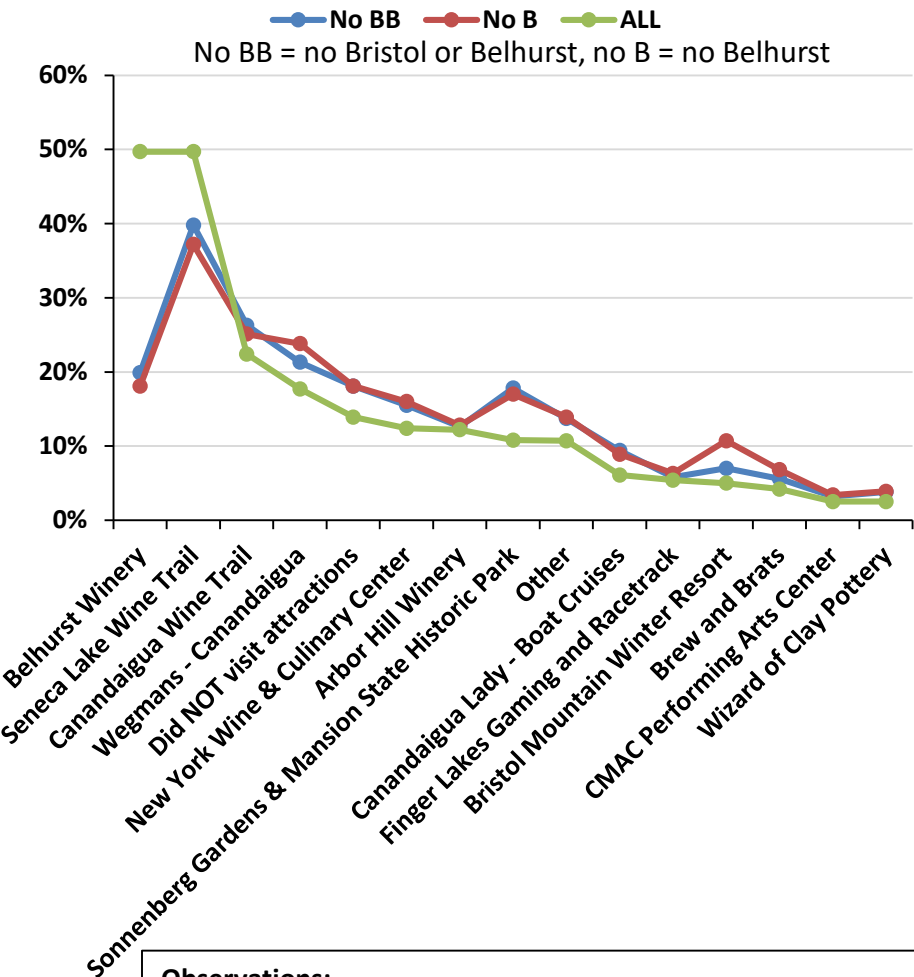


Observations:

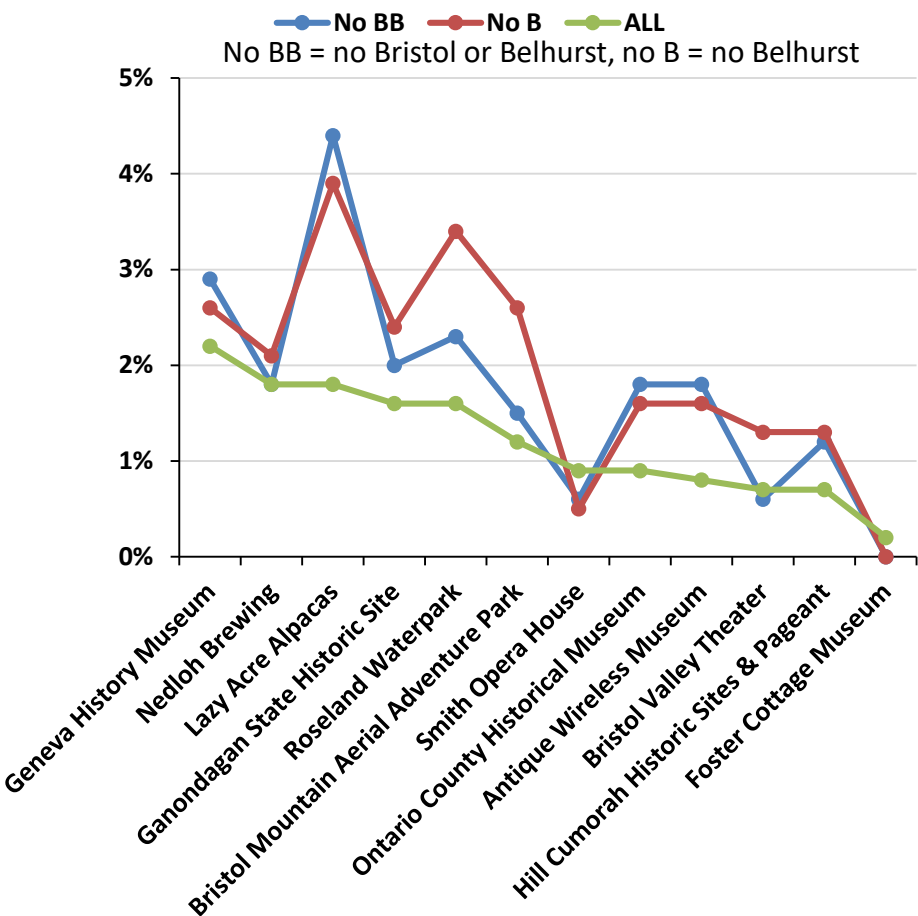
- The top three activities (Winery/wine trail, shopping and fine/local/culinary dining) were also the top three in 2012 research study.
- Any response above 10% of survey respondents is good and shows broad interest among visitors.

What attractions did you or a member of your travel party visit in while visiting Ontario County, New York.

Top 15



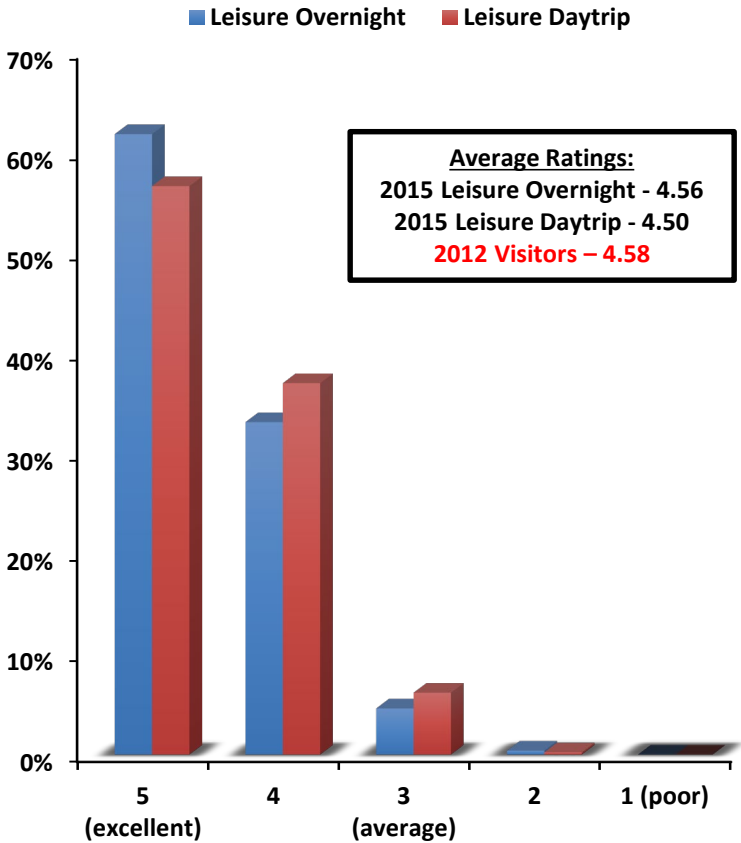
Other Attractions Visited



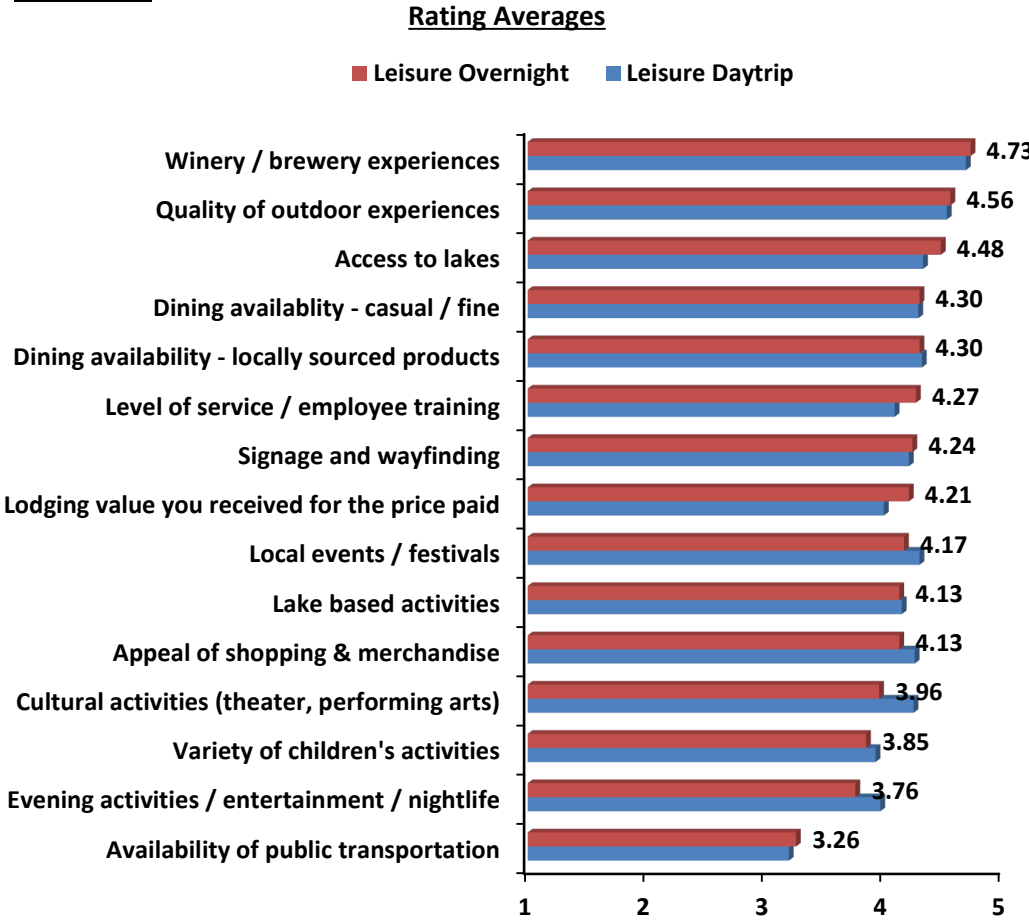
Observations:

- The Seneca Lake Wine Trail is the most popular visitor activity followed by the Canandaigua Wine Trail, Wegman's, NY Wine & Culinary Center, Arbor Hill Winery, Sonnenberg round out the top seven attractions.
- Belhurst Winery rates highly without respondents from Belhurst due to its close proximity to Geneva. Location!

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would you rate your experience visiting Ontario County, New York?



Considering this visit to Ontario County, please rate each of the following amenities on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent).



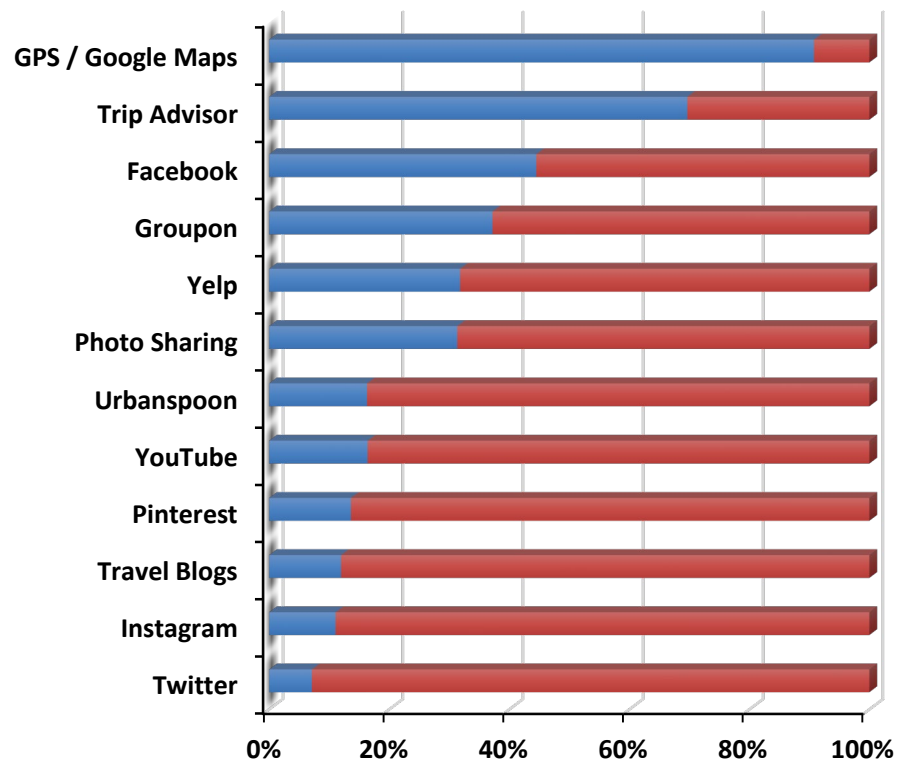
Observations:

- Overall trip ratings remain very high above 4.5, some of the highest we have seen in similar studies.
- Those categories rating below 4.0 that should be analyzed for improvement because they can drive the most increased visitor spending are cultural activities and evening activities.

How did you use the following social media sites or applications as part of your travel to Ontario County, New York?

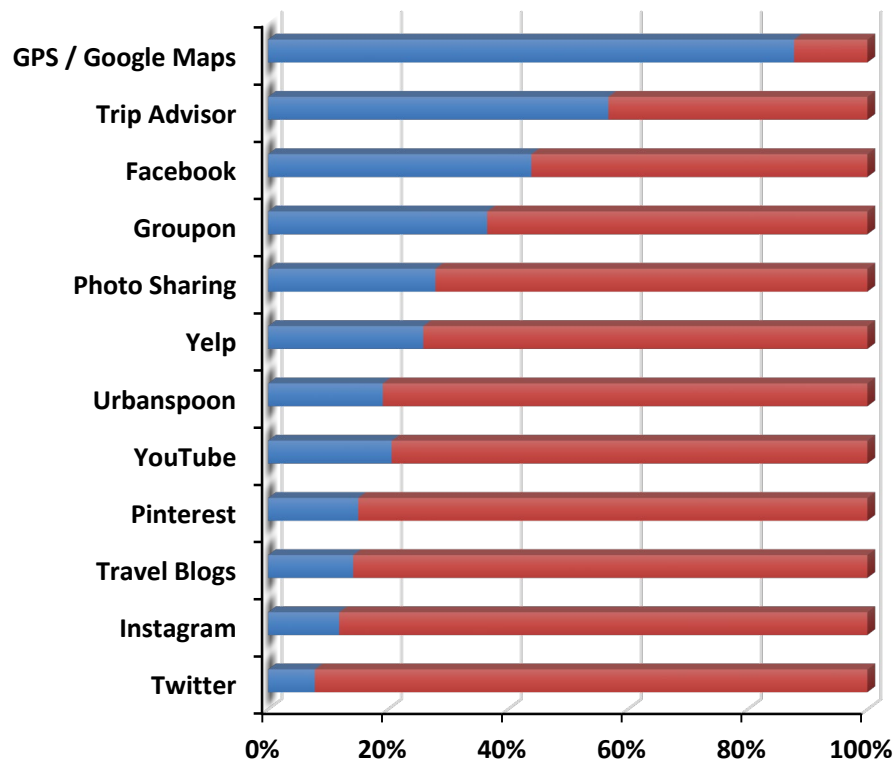
Leisure Overnight

■ Use While Traveling ■ Never Use



Leisure Daytrip

■ Use While Traveling ■ Never Use



Observations:

- GPS & Google maps, Trip Advisor and Facebook are typically the highest rated for use while traveling.
- Photo sharing is popular among visitors and becomes a great marketing opportunity for the destination.

What types of activities or experiences would appeal if offered in Ontario County?

(Rating averages are listed below using a scale from 1 to 5, where 5 is extremely appealing and 1 is not at all.)

Answer Options	Leisure Overnight	Leisure Daytrip
Lakefront village with shopping & dining	4.04	4.08
Trolley to wine tastings	3.64	3.65
Cozy winter getaway package	3.59	3.66
Lodging - retreat house with high level spa & food (4 diamond)	3.27	3.20
Evening entertainment district	3.22	3.29
Alternative lodging experience such as glamping or tree houses	2.52	2.76
Professionally led photography tours to scenic locations	2.31	2.49
Ski area village with lodging, dining, shopping	2.22	2.57
Transportation services such as LYFT or Uber	2.12	1.97
Wake boarding / water sports park - man-made cable system for unique wake boarding experience	1.97	2.25

Observations:

- The common threads in desired future activities are: unique experiences in proximity to one-another, experiences that create memories to last a lifetime, outdoor experiences, scenic beauty, memorable/unique lodging.
- Highest rated among survey respondents was a lakefront village with shopping & dining.

Travel PARTY Spending (Total Trip)

Category	Leisure Overnight (% of reporting)	% of change	Leisure Daytrip (% of reporting)	% of change
Lodging	\$471.10 (77.2%)	+8.6%	\$0.00 (0.0%)	~
Dining/Food	\$351.61 (79.3%)	+42.2%	\$85.81 (80.5%)	+14.7%
Shopping	\$234.32 (52.8%)	+43.7%	\$111.22 (43.4%)	+32.6%
Wineries	\$209.15 (49.3%)	+45.5%	\$93.83 (33.3%)	+25.5%
Attractions	\$134.29 (44.0%)	*	\$90.05 (41.2%)	*
Local Transportation	\$108.18 (0.26%)	+24.4%	\$99.92 (0.10%)	+70.1%
Events	\$101.58 (0.11%)	*	\$69.60 (0.16%)	*
Concerts	\$127.08 (0.03%)	New 2015	\$131.41 (0.08%)	New 2015

Observations:

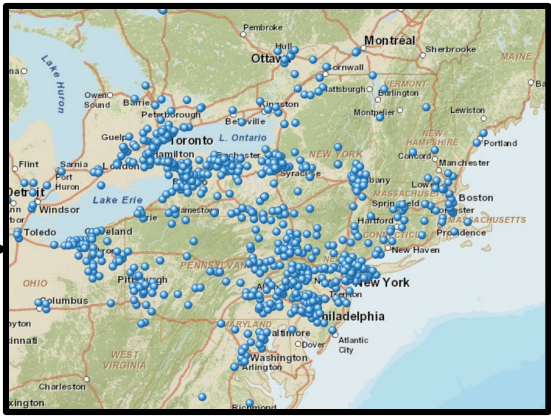
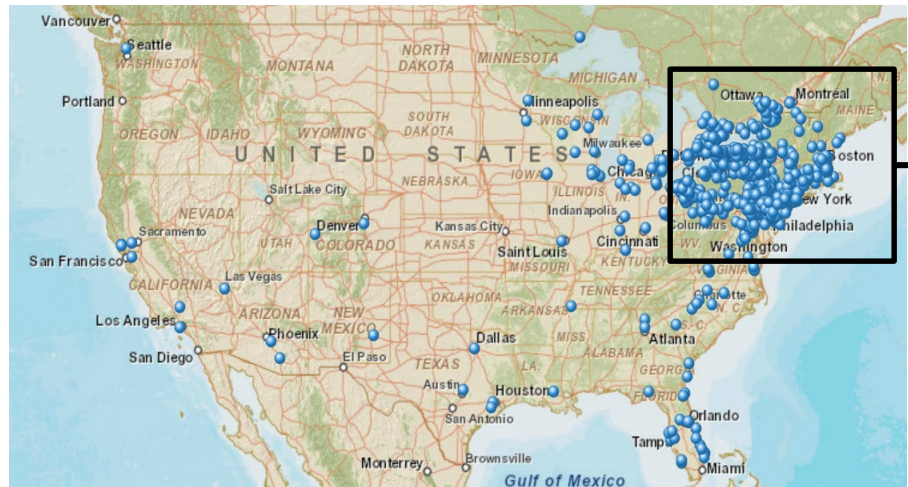
- Overall spending is up in every individual spending category over 2012 reported spending.
- Overnight travelers spend 2-3X more than daytrip.
- Promote overnight and daytrip is a natural by-product.

*Note:

- 2012 overnight respondents reported attraction & event spending together at \$82.46
- Daytrip respondents reported attraction & event spending together at \$48.54

Visitors Point of Origin

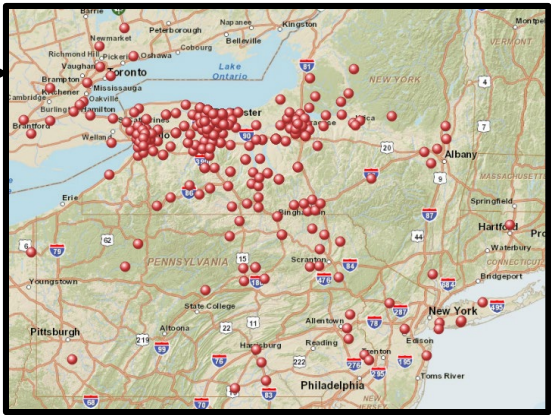
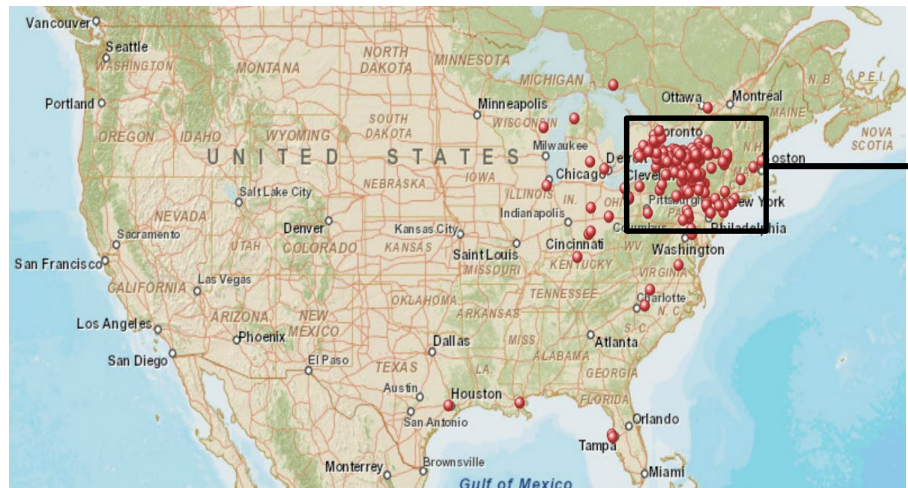
Leisure Overnight



Observations:

- New York State (40%) and Pennsylvania (25%) followed by Ohio (10%) are the most frequent point-of-origin.
- The maps reveal highway drive patterns such as the I90 Thruway and the I-81 corridor to metro Philadelphia.

Leisure Daytrip



Overnight Visitor Points of Origin

State - City													
NEW YORK 40.1%		Williamson	3	Addison	1	Clarence	1	Glenville	1	Maybrook	1	Shortsville	1
Rochester	19	Alexander	2	Attica	1	Clayton	1	Grand Island	1	Mechanicville	1	Silver Creek	1
Syracuse	15	Angola	2	Avon	1	Clinton	1	Greece	1	Medina	1	Sloatsburg	1
Buffalo	12	Baldwinsville	2	Baldwin	1	Cohocton	1	Greenfield Ctr.	1	Middlesex	1	Snyder	1
N. Tonawanda	11	Big Flats	2	Ballston Spa	1	Colden	1	Hamlin	1	Nanuet	1	Speculator	1
Albany	7	Brighton	2	Bellmore	1	Colonie	1	Hastings	1	Narrowsburg	1	Strykersville	1
Williamsville	7	Churchville	2	Bliss	1	Constantia	1	Holland	1	New Hartford	1	Taberg	1
Fairport	6	Cicero	2	Boston	1	Corfu	1	Holley	1	New Rochelle	1	Valatie	1
Auburn	5	Clay	2	Briarwood	1	Cornwall Hdsn	1	Homer	1	New York Mills	1	Valley Cottage	1
Binghamton	5	East Amherst	2	Bridgeport	1	Darien Center	1	Honeoye Falls	1	Newfield	1	Valley Falls	1
Ithaca	5	Elma	2	Brightwarwes	1	Delmar	1	Hopewell Jct	1	Niagara Falls	1	Victor	1
Tonawanda	5	Getzville	2	Brockport	1	Dunkirk	1	Huntington Sta.	1	Norwich	1	Walton	1
West Seneca	5	Kenmore	2	Brocton	1	E Aurora	1	Hyde Park	1	Palmyra	1	Waterford	1
Elmira	4	Long Island City	2	Brunswick	1	East Aurora	1	Irondequoit	1	Pelham	1	Webster	1
Gloversville	4	Macedon	2	Burnt Hills	1	East Bethany	1	Jamestown	1	Penfield	1	West Falls	1
Lockport	4	Massapequa	2	Bville	1	East Norwich	1	Johnson	1	Port Jervis	1	West Monroe	1
New York	4	North Collins	2	Byron	1	Eden	1	Kennedy	1	Poughkeepsie	1	White Plains	1
Spencerport	4	Painted Post	2	Canandaigua	1	Elba	1	Kenoza Lake	1	Rensselaer	1	Windsor	1
Springville	4	Potsdam	2	Canaseraga	1	Elbridge	1	Kirkville	1	Rensselaer Falls	1	Winthrop	1
Brooklyn	3	Saratoga Springs	2	Canastota	1	Endwell	1	Lake View	1	Rockaway Beach	1	Woodhull	1
Clifton Park	3	Schenectady	2	Canton	1	Frankfort	1	Lancaster	1	Rome	1	Wynantskill	1
Endicott	3	Staten Island	2	Carthage	1	Freedom	1	Lewiston	1	Rotterdam	1	Yonkers	1
Hamburg	3	Vestal	2	Cato	1	Freeport	1	Lyncourt	1	Rouses Point	1	PENNSYLVANIA 25.4%	
Liverpool	3	Watertown	2	Catskill	1	Frewsburg	1	Lyons	1	Rye Brook	1	Pittsburgh	8
Owego	3	Waverly	2	Central Square	1	Fulton	1	Marcellus	1	Sanborn	1	Scranton	7
Pittsford	3	West Winfield	2	Cheektowaga	1	Gates	1	Marilla	1	Sea Cliff	1	Mountain Top	4
Wellsville	3	Wheatfield	2	Chittenango	1	Glen Cove	1	Massena	1	Selkirk	1	Philadelphia	4

Overnight Visitor Points of Origin

State - City													
Bethlehem	3	Wernersville	2	Dubois	1	Hunlock Creek	1	Millerstown	1	Springfield	1	Amherst	1
Clarks Summit	3	West Chester	2	Duncansville	1	Huntingdon Vly.	1	Milton	1	Thornhurst	1	At Clairsville	1
Erie	3	York	2	E. Norriton	1	Imperial	1	Montoursville	1	Tobyhanna	1	Atwater	1
Harrisburg	3	Amity	1	East Stroudsburg	1	Irwin	1	Montrose	1	Topton	1	Avon	1
Lancaster	3	Andreas	1	Elizabethtown	1	Jamison	1	Mountville	1	Trevoze	1	Bay Village	1
Pottstown	3	Athens	1	Elkins Park	1	Jim Thorpe	1	Murrysville	1	Uniontown	1	Boardman	1
State College	3	Ayhens	1	Ellwood City	1	Johnstown	1	New Holland	1	Warren	1	Bolivar	1
Avoca	2	Bath	1	Elysburg	1	Kennett Square	1	New Kensington	1	Washington	1	Broadview Hts.	1
Bensalem	2	Bear Creek	1	Exeter	1	Kinzers	1	Nicholson	1	Waterford	1	Broadview Hts.	1
Boalsburg	2	Bear Creek Twsp.	1	Eynon	1	Kunkletown	1	North Wales	1	Watsontown	1	Brook Park	1
Cranberry Twsp.	2	Beaver Falls	1	Feasterville	1	Laceyville	1	Noxen	1	West Hazleton	1	Campbell	1
Dalton	2	Bethel	1	Felton	1	Lafayette Hill	1	Old Forge	1	Wilkes Barre	1	Cleveland Hts.	1
Danville	2	Blandon	1	Forksville	1	Lake Winola	1	Pen Argyl	1	Williamsport	1	Columbus	1
Easton	2	Bloomsburg	1	Forty Fort	1	Langhorne	1	Pine Grove	1	Woodlyn	1	Copley	1
Gillett	2	Bradford	1	Freedom	1	Lansdale	1	Port Matilda	1	Wyomissing	1	Cuyahoga Falls	1
Hollidaysburg	2	Breinigsville	1	Gilbertsville	1	Latrobe	1	Prckville	1	Zion Grove	1	Elyria	1
Hughestown	2	Butler	1	Glenside	1	Lawrenceville	1	Reading	1	Zionsville	1	Fairview Park	1
Lenhartsville	2	California	1	Granville Summit	1	Lebanon	1	Rimersburg	1	OHIO 7.5%		Hubbard	1
Lewisburg	2	Camp Hill	1	Greentown	1	Leesport	1	Robinson Twp	1	Cleveland	5	Huron	1
Media	2	Carbondale	1	Harleysville	1	Lehighton	1	Rome	1	Youngstown	3	Independence	1
Moscow	2	Chalfont	1	Hatfield	1	Lewistown	1	Royersford	1	Canfield	2	Lakewood	1
Northampton	2	Clarks Green	1	Havertown	1	Luzerne	1	Saint Marys	1	Canton	2	Lyndhurst	1
Pittston	2	Clifton Heights	1	Hellertown	1	Macungie	1	Saylorsburg	1	Eastlake	2	Massillon	1
South Park	2	Conestoga	1	Hermitage	1	Marysville	1	Sayre	1	Mentor	2	Mayfield Vlg	1
Sunbury	2	Courtdale	1	Hershey	1	Mcdonald	1	Schellsburg	1	Seven Hills	2	Medina	1
Throop	2	Denver	1	Holmes	1	Mechanicsburg	1	Shamokin	1	Stow	2	Middlefield	1
Walnutport	2	Dingmans Ferry	1	Honesdale	1	Mifflinville	1	Slatington	1	Toledo	2	New Albany	1

Overnight Visitor Points of Origin

State - City							
North Canton 1	Fair Lawn 1	Trenton 1	Westfield 1	Bethesda 1	Wallingford 1	Santa Monica 1	
North Ridgeville 1	Flanders 1	Upper saddle 1	Winchester 1	Columbia 1	VIRGINIA 1.6%	Tehachapi 1	
Painesville 1	Glassboro 1	Vernon 1	Woburn 1	Eldersburg 1	Alexandria 2	Winters 1	
Parma 1	Hackettstown 1	Waldwick 1	Worcester 1	Glen Burnie 1	Woodbridge 2	INDIANA- 0.7%	
Perrysburg 1	Hammonton 1	Wayne 1	FLORIDA 2.5%	Hagerstown 1	Yorktown 2	Albion 1	
Reynoldsburg 1	Hasbrouck Hts. 1	West Deptford 1	Jacksonville 2	Kingsville 1	Arlington 1	Huntertown 1	
Rootstown 1	Hawthorne 1	Williamstown 1	Palm Beach Gdns 2	North Bethesda 1	Falls Church 1	McCordsville 1	
Salem 1	Hoboken 1	MASSASHUSETTS	Bonita Springs 1	Parkville 1	Hardy 1	Nashville 1	
Sheffield Lake 1	Howell 1	3.1%	Boynton Beach 1	Severna Park 1	Hayes 1	South Bend 1	
Uniontown 1	Jersey City 1	Canton 3	Clearwater 1	Silver Spring 1	Midlothian 1	Warsaw 1	
Warren 1	Lebanon 1	Boston 2	Lake Park 1	Sykesville 1	Troy 1	NEW HAMPSHIRE-	
Waynesburg 1	Lindenwold 1	Chelmsford 2	Leesburg 1	Walkersville 1	Union Hall 1	0.7%	
West Chester 1	Marlton 1	Brockton 1	Melbourne 1	CONNECTICUT	MICHIGAN 1.3%	Littleton 1	
Willowick 1	Midland Park 1	Granby 1	Naples 1	1.8%	Chesterfield 1	Newport 1	
NEW JERSEY 6.1%	Millstone Twsp. 1	Groton 1	Orlando 1	Fairfield 2	Clarkston 1	Newton 1	
Bloomfield 2	Montclair 1	Haverhill 1	Oviedo 1	Danbury 1	Dexter 1	Sandown 1	
Denville 2	Moorestown 1	Hopedale 1	Palmetto 1	Ellington 1	Holland 1	Tilton 1	
Garfield 2	North Haledon 1	Ludlow 1	Port Saint Lucie 1	Farmington 1	Kalamazoo 1	Wilton 1	
Jackson 2	Park Ridge 1	Methuen 1	Stuart 1	Lisbon 1	Lincoln Park 1	WISCONSIN 0.7%	
Oakland 2	Pine Brook 1	No. Grafton 1	Tallahassee 1	Manchester 1	Midland 1	Greenville 1	
Audubon 1	Piscataway 1	North Attleboro 1	Tampa 1	Naugatuck 1	Plainwell 1	Menomonee Fls. 1	
Belvidere 1	Pomona 1	North Dartmouth 1	Vero Beach 1	Plainville 1	Riverview 1	Middleton 1	
Brick 1	Randolph 1	Plymouth 1	Wimauma 1	Putnam 1	Rochester Hills 1	Oconto 1	
Budd Lake 1	Rutherford 1	Somerville 1	Winter Springs 1	Salisbury 1	Royal Oak 1	Plover 1	
Cherry Hill 1	Sewel 1	South Hadley 1	MARYLAND 2.4%	Stratford 1	CALIFORNIA 0.7%	Tomah 1	
East Brunswick 1	Somerset 1	Springfield 1	Baltimore 5	Suffield 1	Santa Rosa 2	ILLINIOSIS 0.6%	
Fair Haven 1	South Plainfield 1	Stoughton 1	Timonium 3	Trumbull 1	Danville 1	Chicago 2	

Overnight Visitor Points of Origin

State - City				International
Crystal Lake	1	KENTUCKY- 0.2%	NEW MEXICO- 0.1%	CANADA- 95.5%
Elgin	1	Louisville 2	Roswell 1	Ontario 144
Inverness	1	MAINE- 0.2%	NEVADA- 0.1%	Quebec 4
NORTH CAROLINA 0.6%		Scarborough 1	Las Vegas 1	ISRAEL 1.3%
Greensboro 1		Yarmouth 1	RHODE ISLAND- 0.1%	UNITED KINGDOM- 1.3%
Harrisburg 1		MINNESOTA- 0.2%	Pawtucket 1	FRANCE- 0.6%
Raleigh 1		Farmington 1	TENNESSEE- 0.1%	HONG KONG- 0.6%
Rockwell 1		Harris 1	Bartlett 1	SWITZERLAND- 0.6%
West End 1		SOUTH CAROLINA 0.2%	WASHINGTON- 0.1%	
GEORGIA 0.5%		Ft Mill 1	Clinton 1	
Jasper 1		Greenwood 1		
Marietta 1		VERMONT- 0.2%		
Savannah 1		Fairfax 1		
St Simons Island 1		New Haven 1		
TEXAS 0.4%		WEST VIRGINIA- 0.2%		
Austin 1		Morgantown 2		
Houston 1		WASHINGTON DC- 0.1%		
Richmond 1		Washington 1		
ARIZONA- 0.2%		DELAWARE- 0.1%		
Chandler 1		Middletown 1		
Tucson 1		LOUISIANA- 0.1%		
COLORADO 0.2%		Baton Rouge 1		
Grand Junction 1		MISSOURI- 0.1%		
Highlands Ranch 1		Chesterfield 1		
IOWA- 0.2%				
Cedar Rapids 1				
Marion 1				



Daytrip Visitor Points of Origin

State - City													
NEW YORK 86.2%	Penn Yan	3	Alfred Station	1	Dunkirk	1	N Syracuse	1	Strykersville	1	Harding	1	
	Rochester	68	Seneca Falls	3	Allegany	1	East Amherst	1	N Tonawanda	1	Sylvan Beach	1	
	Fairport	24	West Henrietta	3	Angelica	1	East Aurora	1	New Woodstock	1	Syrac/Eastwood	1	
	Webster	16	West Seneca	3	Attica	1	East Syracuse	1	Niagara Falls	1	Tonawanda	1	
	Syracuse	15	Williamson	3	Ava	1	Elma	1	Niskayuna	1	Victor	1	
	Pittsford	13	Akron	2	Avon	1	Elmira	1	North Chili	1	Voorheesville	1	
	Liverpool	9	Amherst	2	Barre	1	Endicott	1	N. Tonawanda	1	Wadsworth	1	
	Auburn	8	Baldwinsville	2	Bath	1	Fayetteville	1	Orchard Park	1	Warners	1	
	Honeoye Falls	7	Bloomfield	2	Boonville	1	Gates	1	Ovid	1	Waterloo	1	
	Penfield	7	Brighton	2	Brewerton	1	Geneseo	1	Owego	1	Watkins Glen	1	
	Spencerport	7	Byron	2	Brockport	1	Geneva	1	Palmyra	1	Wayland	1	
	Macedon	6	Canandaigua	2	Buchanan	1	Glenfield	1	Parma	1	Williamstown	1	
	Buffalo	5	Clay	2	Burdett	1	Grand Island	1	Penfild	1	Wilson	1	
	Batavia	4	Getzville	2	Cato	1	Hamburg	1	Perinton	1	Yorkville	1	
	Binghamton	3	Lancaster	2	Chili	1	Henrietta	1	Phoenix	1	PENNSYLVANIA 7.3%	Tioga	1
	Camillus	3	Lockport	2	Churchville	1	Hornell	1	Ransomville	1		Wellsboro	1
	Cheektowaga	3	Medina	2	Cicero	1	Horseheads	1	Rockaway Park	1	Williamsport	4	OHIO 2.0%
	Cortland	3	Ontario	2	Clarence	1	Howard Beach	1	Rome	1	Sayre	2	
	Dansville	3	Pavilion	2	Clyde	1	Kendall	1	Rush	1	Towanda	2	
	East Rochester	3	Prattsburgh	2	Conesus	1	Lacona	1	Saratoga Springs	1	Bethlehem	1	
	Greece	3	Trumansburg	2	Constantia	1	Lakemont	1	Scottsville	1	Cogan Station	1	
	Hilton	3	Utica	2	Corning	1	Leicester	1	Seaford	1	Covington Twsp	1	
	Irondequoit	3	Vestal	2	Cuba	1	Leroy	1	Skaneateles	1	Dallas	1	
	Ithaca	3	Walworth	2	Deow	1	Mechanicville	1	Smithfield	1	Etters	1	
	Jamesville	3	Williamsville	2	Depew	1	Minetto	1	Solvay	1	Factoryville	1	
	Lima	3	Addison	1	Dewitt	1	Montour Falls	1	Stony Brook	1	Forest City	1	
	Livonia	3	Alden	1	Duanesburg	1	N Massapequa	1	Stratford	1	Gettysburg	1	

Daytrip Visitor Points of Origin

State - City		
MICHIGAN 0.7%		
East Lansing	1	
Livonia	1	
Traverse City	1	
NEW JERSEY 0.7%		
Landing	1	
South Plainfield	1	
Tinton Falls	1	
FLORIDA 0.5%		
Clearwater	1	
Palm Harbor	1	
MASSACHUSETTS 0.5%		
Haverhill	1	
Lancaster	1	
MARYLAND 0.5%		
Baltimore	1	
Pasadena	1	
CONNECTICUT 0.2%		
Windsor	1	
ILLINOIS 0.2%		
Tinley Park	1	
KENTUCKY 0.2%		
Coxs Creek	1	
LOUISIANA 0.2\$		
New Orleans	1	
NORTH CAROLINA 0.2%		
Greensboro	1	
TEXAS 0.2%		
Houston	1	
VIRGINIA 0.2%		
Richmond	1	
WISCONSIN 0.2%		
De Pere	1	

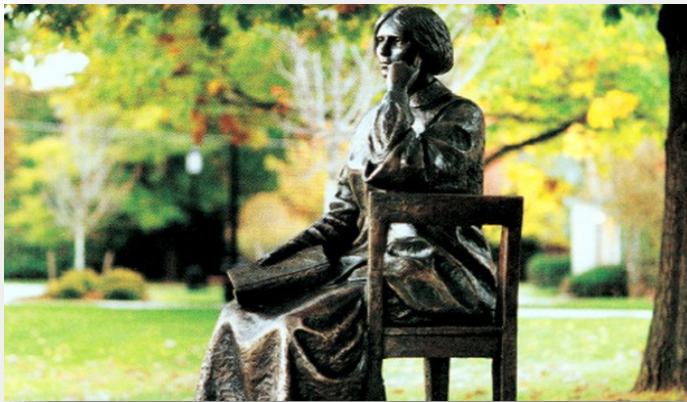
International	
CANADA- 90.0%	
Burlington	2
Toronto	2
Brantford	1
Elliot Lake	1
Grimsby	1
Guelph	1
Hamilton	1
Limoges	1
Mississauga	1
Newmarket	1
Norwich	1
Oshawa	1
Port Colborne	1
St.Catharines	1
Sunderland	1
Woodstock	1
BRAZIL 5.0%	
SPAIN- 5.0%	



Visitor Survey Summary

- Average age of respondents is high at 52- 54. Baby-Boomers are most prevalent generation group followed by GenX, need to appeal to a younger demographic to drive maximum spending.
- Weekends: Younger travelers can come for weekends, holidays, long weekends and summer vacations (rentals).
- Weekdays: Target retired travelers and business meetings for weekdays.
- High repeat visitation = MATURE market meaning that most people within the 2-3 drive market know about or have visited the destinations within Ontario County. Growth comes from Pennsylvania and Ohio.
- High Satisfaction & Spending.
- Too much “leakage”, need to keep overnights in county as much as possible.
- Digital & social outpace traditional but don’t replace it anytime soon.
- Need additional unique, engaging outdoor and evening activities





Residents Survey



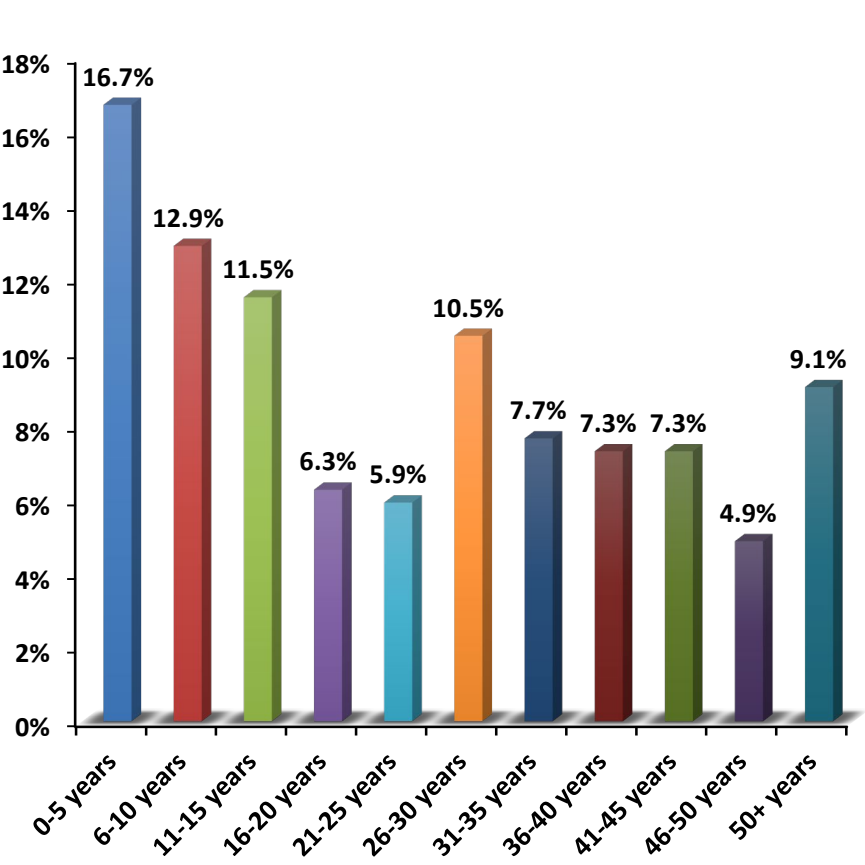
Finger Lakes
Visitors Connection
 Ontario County, NY
visitfingerlakes.com



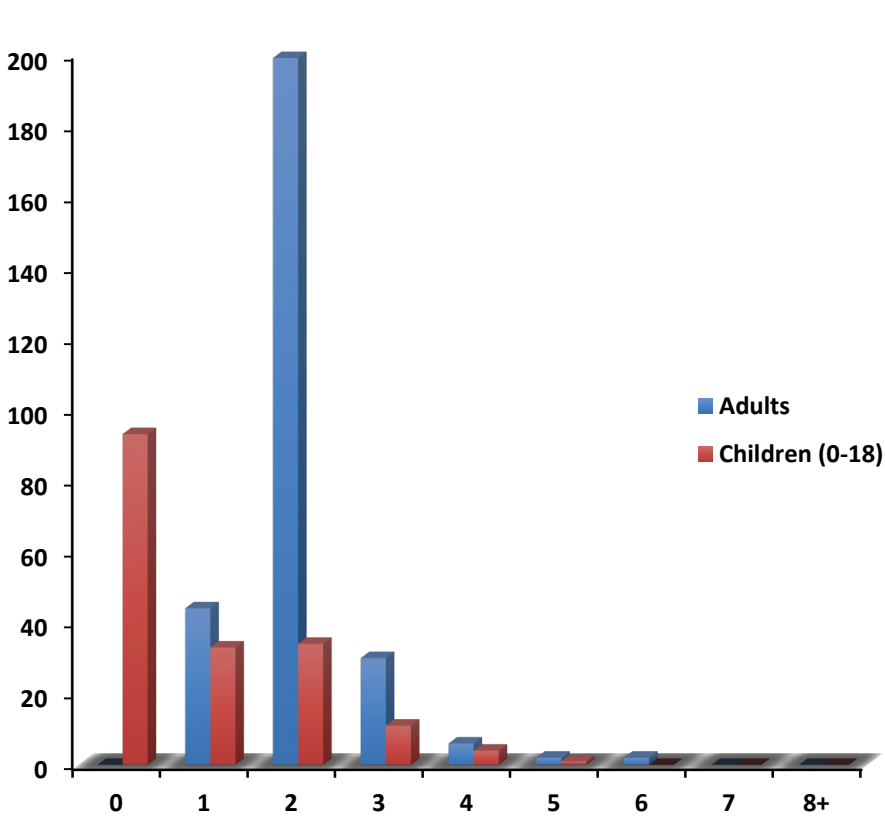
Resident Demographics

Demographics		2015
Average Age		53.7
Generational Group		
	Generation Y (9 – 28)	3.9%
	Generation X (29 – 49)	33.7%
	Baby Boomer (50 – 67)	47.5%
	Silent Generation (68 – 85)	14.9%
Gender		
	Female	75.5
	Male	24.5
Occupation		
	Retired – 30.0%	
	Education – 16.5%	
	Healthcare Industry – 12.2%	
	Professional/Technical – 7.2%	
	Executive/Manager – 5.1%	
Level of Education		
	College	44.4%
	Graduate	37.7%
	Some College	10.9%
Ethnicity		
	White/Caucasian	94.2%
	Prefer not to answer	5.1%
	American Indian or Alaskan Native	1.6%
	Asian or Pacific Islander	1.6%
	Black or African American	0.4%

How many years you have lived in Ontario County? n=287

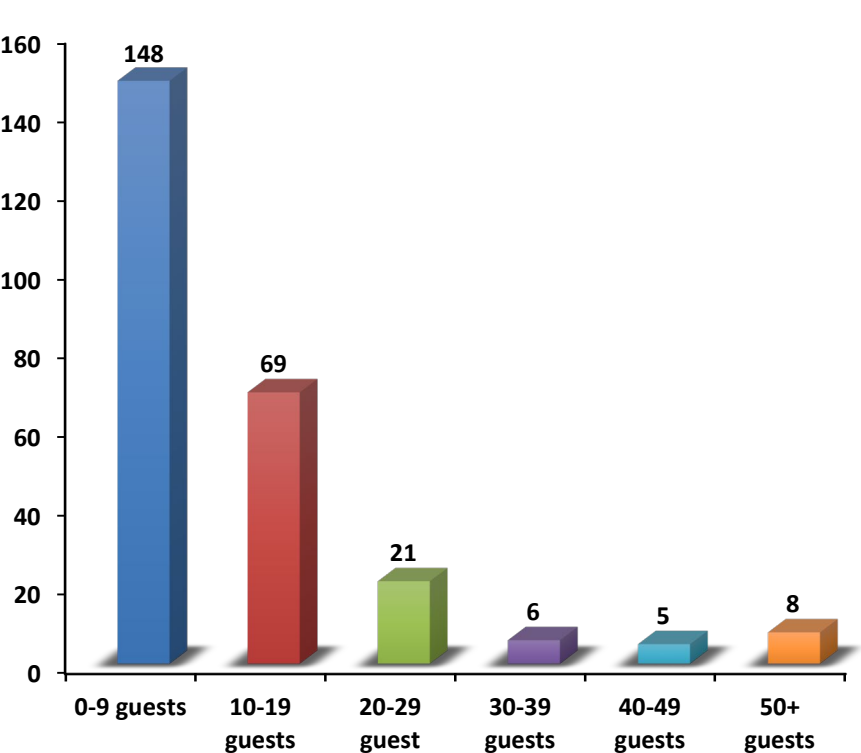


How many people currently live in your household? n=287

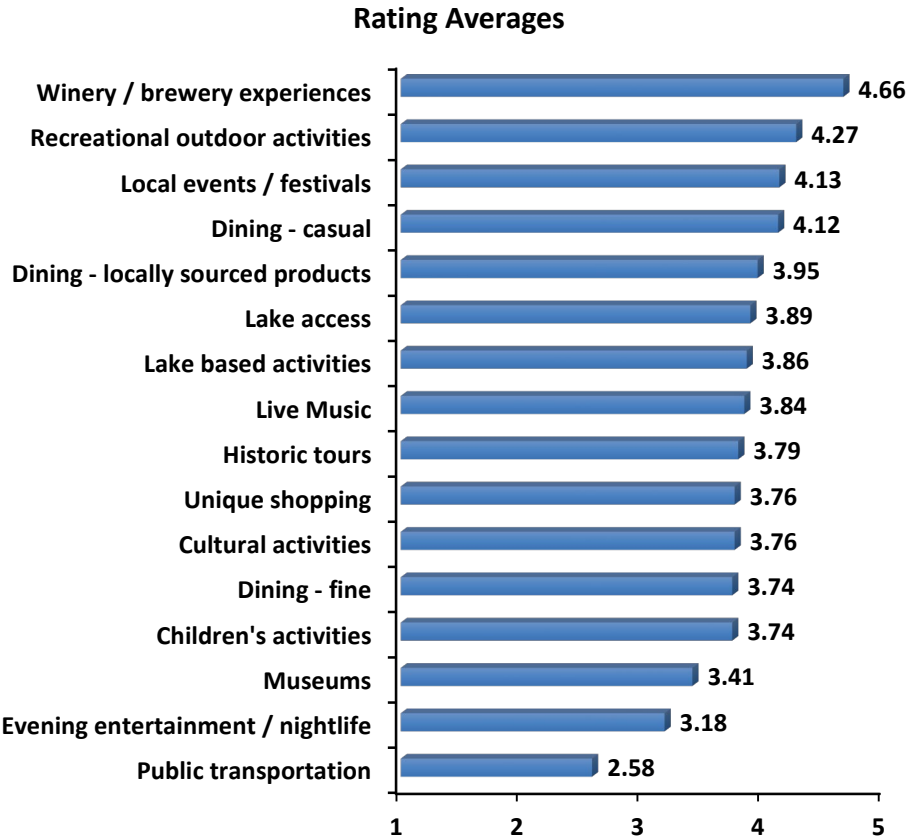


Please estimate the TOTAL number of overnight guests you hosted in your home last year? n=259

- (Count each guest, each time they visit. i.e. Uncle Bob came on three separate visits = 3 guests)



When guests visit you, please rate your level of satisfaction with the following Ontario County experiences. Please rate on a 5 point scale where 1 = poor, 3 = average and 5 = excellent. n=261



What words would you use to describe Ontario County to others?

- A Destination
- A Haven For Wine And Food Lovers
- A Lot To Do
- A Step Back In Time
- Absolutely Gorgeous
- Abundant
- Abundant Art And Music
- Abundant In Recreational Adventures And Opportunities
- Abundant Wineries
- Abundantly Rich
- Access To Art And Music Events
- Accessible
- Active
- Activities Of All Kinds
- Activity Filled (2)
- Adventure
- Adventure At Every Turn
- Adventurous
- Affordable
- Agrarian (2)
- Agricultural (2)
- Alot To Offer
- Amazing
- Amazing Lakes
- Amazing Wine
- An Artist's Paradise
- Antiquated Referral To City
- Arts Oriented
- Athletic
- Awesome
- Awesome Autumn Foilage
- Awesome Dining
- Awesome Lakes
- Awesome Natural Scenery
- Awesome Outdoor Activities
- Awesome Scenic Views
- Awesome Skiing
- Balanced..Between Activities, Lodging, And Shopping
- Beautiful (114)
- Beautiful Country
- Beautiful Lake (4)
- Beautiful Lake And Countryside
- Beautiful Lake Views
- Beautiful Lakes (4)
- Beautiful Landscapes (2)
- Beautiful Nature
- Beautiful Places To Hike, Bike, Kayak, Ski And Xcountry Ski.
- Beautiful Rolling Hills
- Beautiful Scenery (10)
- Beautiful Setting
- Beautiful, Green , Rolling Hills , That Never Seem To End.
- Beautiful, Scenic
- Beautiful, Tranquil Countryside
- Beautiful Vistas
- Beauty (3)
- Beer Country
- Beer Trail
- Besides Lake Activities Or Waterpark-Low On Activities For Kids Long Term. (2)
- Best
- Best Place Ever
- Best Scenery
- Best Views
- Better Weather Than Most Places Upstate
- Boating
- Bountiful

What words would you use to describe Ontario County to others?

- Boutique
- Breath Taking
- Breath Taking Views (2)
- Breathtaking (10)
- Breathtaking Beauty
- Breathtaking Views
- Brimming With Lakes
- Bristol Mt. For Winter Fun
- Bucolic (2)
- Busy (4)
- Calming
- Camping
- Canandaigua Lake
- Candice, Hemlock Lake Untouched Shores Since Native Americans Lived Here
- Casino
- Change Of Seasons
- Choice
- Chosen Spot
- Clean And Unspoiled
- Close To Canandaigua Lake
- Close To Eastview Mall
- Close To Everything
- Close To Rochester
- Close To The City(Roch)
- Cold (3)
- Cold And Snowy In The Winter
- Colorful
- Comfortable
- Comfortable Size
- Congenial
- Cool Small Towns
- Country (4)
- Country Charm
- Country Lifestyle
- Cozy And Warm, Especially In The Winter
- Crime
- Crossroads Of Rural And Suburban
- Culinary (2)
- Cultural
- Cultural And Upscale
- Cultural, Historical, Quiet, Bustling (You Can Find What You Want Here)
- Cultured
- Currently More Developed
- Cute Shops
- Delicious
- Delightful
- Depending On The Season Skiing/Boating/Leaves
- Developed For Tourists
- Diverse (6)
- Diverse Activities (2)
- Diverse Entertainment
- Easy And Enjoyable To Get Around
- Easy To Get Around
- Easy To Travel With In
- Eclectic
- Economically Challenged
- Education System(Cdga.) (2)
- Educational (2)
- Elegant Dining
- Emerging
- Enjoyable (2)
- Enriching Culture; Small-Town/Agricultural/Light Industry
- Entertaining
- Eventful
- Everything You Need Is Here
- Excellent Eateries

What words would you use to describe Ontario County to others?

- Excellent Wine And Beer
- Excellent Wineries
- Exciting
- Expensive
- Extraordinarily Beautiful
- Fabulous Access To Wineries And Breweries
- Fall Festive
- Family Oriented
- Farm Country
- Farm To Table/Market
- Farming Community
- Farmland Beauty
- Filled W/Museums And Art Galleries
- Filled With A Variety Of Attractions
- Filled With History
- Finger Lakes (2)
- Fishing And Boating
- Fishing, Fishing And Did I Mention Fishing?
- Food (2)
- Forested
- Forested Hills
- Four Fun Seasons, With Spectacular Vistas
- Four Seasons
- Fresh
- Fresh Lakes
- Friendly (22)
- Friendly And Courteous
- Friendly People (3)
- Fun (18)
- Fun In All Directions
- Fun In Summer
- Fun To Explore
- Fun!
- Fun-Loving
- Good Eating
- Good Food
- Good For Nature Lovers
- Good Retail, Restaurants, Theatre, Places To Visit
- Good Skiing
- Gorgeous (2)
- Gorgeous Environment, Parks
- Gorgeous Lakes
- Gorgeous!
- Grape Country
- Grape Festival
- Great (3)
- Great Adventure Areas
- Great Arts
- Great Arts And History
- Great Bike Trails
- Great Boating
- Great Camping
- Great Cycling
- Great Entertainment; Plays, Flcc Concert Venue, Honeoye Friday Night Concerts, Glenora Jazz. Etc
- Great Fishing
- Great Food
- Great Food And Lodging Options
- Great For Hiking
- Great Grapes
- Great Hiking,Skiing.Kayaking
- Great Lakes
- Great Location For Exploring Other Areas
- Great Museums
- Great Outdoor Activities
- Great Outdoor Adventures (2)

What words would you use to describe Ontario County to others?

- Great Outdoors
- Great Outdoors Fun
- Great Parks
- Great People (2)
- Great Place
- Great Place For Downhill & Xc Skiing
- Great Place To Live (3)
- Great Place To Raise A Family
- Great Recreation
- Great Recreation; Boating, Swimming, Skiing, Biking, Etc.
- Great Residents
- Great Restaurants (2)
- Great Scenery And Roads
- Great Shopping (3)
- Great Wine
- Great Wineries
- Great Wines (4)
- Great Wines, Vegetables, Cheese, Apples And Locally Grown Produce
- Great,With Beautiful Lakes And Attractive Villages And Cities.
- Green (4)
- Growing
- Growing Brewers And Other Types Of Crafters (Honey Etc.)
- Has A Little Of Everything
- Healthy
- Healthy Lifestyle
- Healthy Living
- Heart Of The Finger Lakes (2)
- Helpful
- Hidden Gem
- Hidden Secret
- Hidden Wonders
- High Taxes (2)
- Hiking
- Hiking Trails And Waterfalls That Are Amazing.
- Hills
- Hilly (2)
- Historic (11)
- Historic Treasures
- Historical (8)
- Historically Rich
- Home (5)
- Home Of Sonnenberg Estate
- Hometown
- Hospitality
- Ideal
- Inexpensive
- Interesting (6)
- Interesting Places To Visit
- Intriguing
- Inviting (2)
- It Is The Chosen Spot
- Laid Back
- Lake (5)
- Lake Country
- Lake Life
- Lake Resort
- Lake Water Clean Enough To Drink
- Lakes (12)
- Lakes And Hills
- Limited Lake & Swimming Access - Not Like Keuka Or Seneca.
- Limited Lake Access Public Beaches(Postage Stamp)
- Locality Of Things To Do
- Lots Of Free/Inexpensive Activities
- Lots Of Lakes And Outdoor Activities
- Lots Of Open Spaces
- Lots Of Outdoor Recreation
- Lots Of Senior Services

What words would you use to describe Ontario County to others?

- Lots Of Skiing
- Lots Of Things To Do (3)
- Lots Of Water
- Lots Of Water Activity Opportunities
- Lots Of Wildlife
- Lots Of Woods
- Lots To Do (6)
- Lots To See (2)
- Lots To See And Do
- Love It
- Lovely
- Low Taxes!
- Lower Taxes (2)
- Lowest Sales Tax
- Lucky
- Lucky To Have To Offer To Others
- Lush Landscape
- Majestic
- Magnificent Lakes For Kayaking
- Many Events To Attend
- Many Hiking Trails
- Many Interesting Places To Visit
- Many Outdoor Activities, Wineries, Hiking, Boating,
- Mellifluous
- Microbreweries
- Missing A Gym
- Mountain
- Much To Do
- Much To See And Explore
- Multi-Seasonal
- Multitude Of Things To Do
- Natural (2)
- Natural Beauty; Lakes, Mountains, Forests
- Natural Resource Are Great
- Naturally Beautiful (Lakes And Wineries)
- Nature (5)
- Nature Friendly
- Natures Playground
- Near Rochester
- New Things To Come
- Nice (3)
- Nice For Families
- Nice Get A Way
- No Or Almost No Dining Near Bristol Mountain
- Offers Enjoyment To Every Member Of The Family
- One Of The Finger Lakes Ffor Summer Fun
- One Stop Shopping - We Have It All
- Opportunity
- Outdoor Activities (3)
- Outdoor Fun Summer Or Winter
- Outdoor Opportunities
- Outdoor Paradise
- Outdoors
- Outlet Shopping
- Packed With Entertainment/Recreational Opportunities
- Parks
- Peaceful (16)
- People Friendly
- Perfect
- Perfect Riesling Climate
- Physical Activities
- Picturesque (12)
- Picturesque And Tranquil
- Pleasant (3)
- Pleasant Lake Country
- Plentiful Hiking Opportunities

What words would you use to describe Ontario County to others?

- Plenty Of Outdoor Activities For All Levels Of Fitness
- Plenty Of Places To Visit
- Plenty Of Recreation
- Plenty To Do
- Polysemy
- Pretty (3)
- Pristine
- Progressive (2)
- Pure Country
- Quaint
- Quiet
- Quiet In The Winter
- Quintessential Upstate Ny
- Quite (10)
- Rapid Growth/Development
- Reasonable
- Recreational
- Recreational Opportunities
- Refreshing
- Relaxing (17)
- Remote
- Renewal
- Resort
- Restful
- Retreat
- Rolling Hills (4)
- Rural (19)
- Rural Beauty
- Rural But Accessible
- Safe (4)
- Safe Family Area
- Scenery
- Scenic (50)
- Seneca Lake
- Scenic Variety
- Shopping (2)
- Short Drive
- Simply Amazing
- Skiing
- Slower Pace
- Small And Comfortable
- Small Town (2)
- Small Towns (2)
- Snowy
- So Much To Do
- Some Good Restaurants
- Something For Every Age
- Something For Everyone (4)
- Something Run For Everyone
- Special
- Spectacular
- Spectacular Lakes
- Spiritual
- State Parks
- Steeped In History
- Stunning
- Suburban
- Summer
- Summer Excitement
- Supportive Of Each Other
- Tasteful
- The Best Winery/Brewery
- The Chosen County
- The Lake
- Things To Do
- Thoughtful Density Planning

What words would you use to describe Ontario County to others?

- Thriving
- Time Stands Still
- To Be Discovered
- Tons Of Activities
- Tons Of Things To Do
- Too Many Oversized Motorboats
- Too Much Development On Hills Around Lakes - Ruining Scenic Vistas
- Tourist Friendly (4)
- Touristy
- Tranquil
- Trendy
- Truly Magical
- Truly, The Chosen Spot
- Tuscan-Like
- Under Developed Retail
- Undiscovered
- Unique (5)
- Unique Dining Experiences
- Unspoiled
- Untapped Potential
- Vacation Spot
- Varied
- Varied Opportunities - Sporting Events, Wine, Cheese, Beer Trails
- Varied Weather
- Variety Of Activities
- Variety Of Activities
- Variety Of Things To Do
- Versatile
- Very Friendly (2)
- Very Friendly People
- Very Geographical
- View
- Villages, Lakes, Hills
- Vineyards (2)
- Viticulture, Brewing
- Wanting To Find Out More
- Waterfalls
- Wegmans (3)
- Welcoming (5)
- Welcoming And "Homey"
- Wholesome
- Wine (5)
- Wine Country (16)
- Wine Country Unique Downtown Shops
- Wine Tours (3)
- Wine Trail (2)
- Wineries (12)
- Wineries & Micro Breweries
- Wineries With A Craft Beer Popping Up All Over
- Winter Fun
- Wonderful Hiking Opportunities
- Wonderful People
- Wonderful Scenery
- Wonderful Scenery
- Wonderful Wine Trails
- Wooded & Secluded
- Worth Visiting
- Year Round Fun
- Year Round Seasons



Neighboring Counties



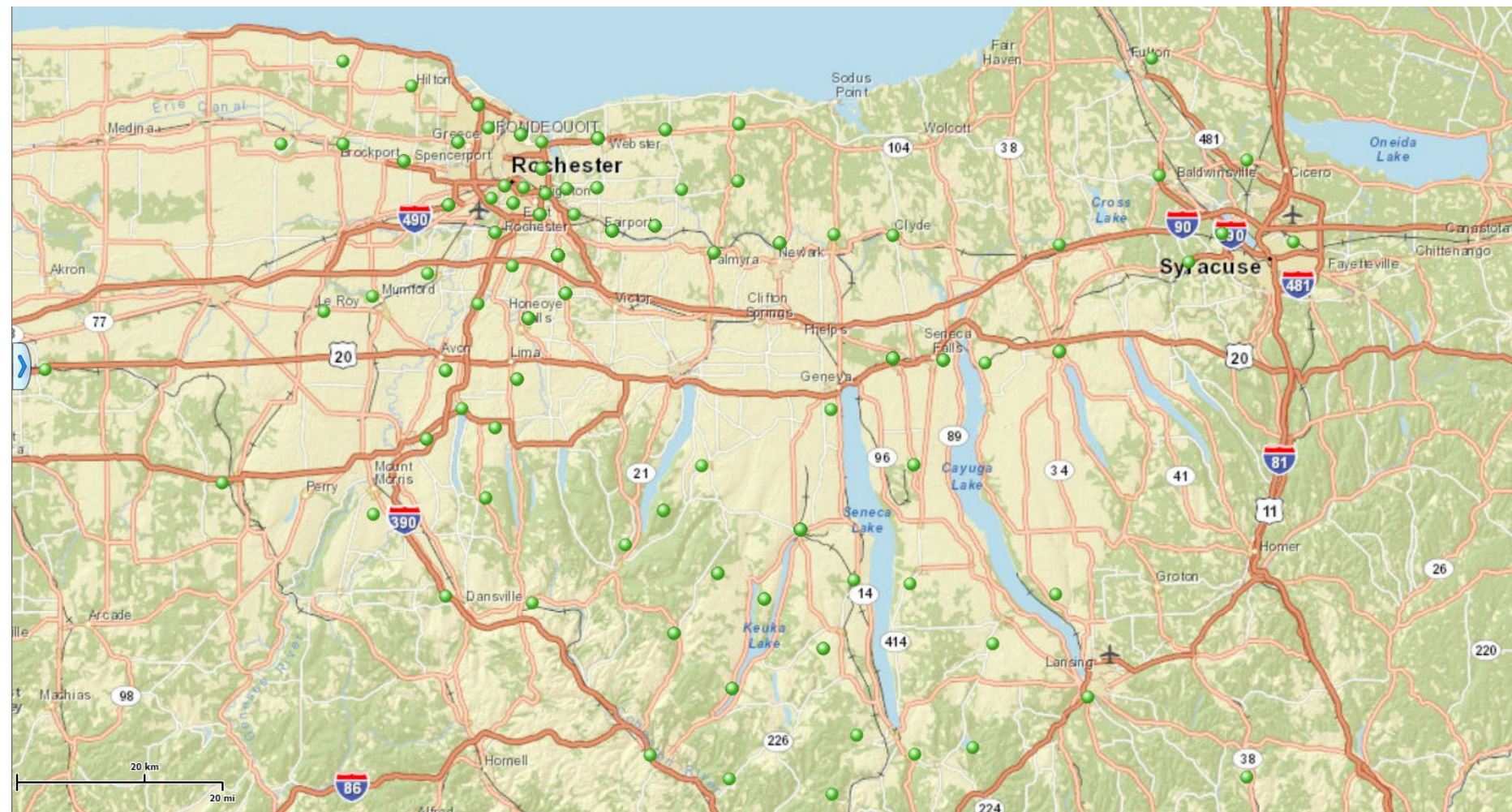
Neighboring Counties Demographics

Demographics	2015
Average Age	52
Generational Group	
Generation Y (9 – 28)	1.9%
Generation X (29 – 49)	39.2%
Baby Boomer (50 – 67)	49.8%
Silent Generation (68 – 85)	9.1%
Gender	
Female	72.0%
Male	28.0%
Occupation	
	Retired- 21.1%
	Education- professor/teacher – 14.3%
	Healthcare Industry – 12.4%
	Professional/technical- 12.4%
	Executive/manager - 6.0%
Level of Education	
College	43.7%
Graduate	35.6%
Some College	13.8%
Ethnicity	
White/Caucasian	94.2%
Prefer not to answer	3.8%
American Indian or Alaskan Native	1.5%
Asian or Pacific Islander	1.2%
Hispanic or Latino	1.2%
Black or African American	0.4%

Neighboring County Residents

- 86% of respondents said they visited in the last year
- Friends or family referral, travel story in newspaper/magazine/online, and Facebook were the top 3 inspirations for visiting Ontario county
- The top trip planning purposes were reported as follows: friends or family referral, www.fingerlakeswinecountry.com, and Facebook.
- Social media- GPS/Google Maps and Facebook were the top social media sites or applications used as part of respondents travel to Ontario County, while YouTube and Twitter were reported as least used.
- Primary destination- 67% of neighboring county visitors reported that Canandaigua and Geneva were their primary destinations to Ontario County.
- Other popular communities visited were Watkins Glen, Victor, Naples, and Ithaca.
- Average travel party size was 2.6
- Over 52% of neighboring county respondents say they never take an overnight trip to Ontario County
- 35% of neighboring county respondents reported taking a daytrip to Ontario County once or twice a month (20-52 times or more annually)
- Most popular months to visit: June, July, August
- 86.9% of neighboring country respondents said that their most recent trip to Ontario County was a daytrip, while 13.1% reported spending at least one night.
- Last minute planning- 64% of respondents booked their travel within 30 days of arrival (n=36)
- Average nights stayed in Ontario County was 2.1
- Types of accommodations- Hotel/motel 38%, friends or family house 27%, vacation home/cottage rental 24%
- Top 5 activities- shopping, winery/wine trail, fine or local culinary dining, water recreation, and hiking/walking.
- Top attractions- Sonnenberg Gardens and Mansion State Historic Park, Belhurst Winery, Seneca Lake Wine Trail, Wegmans- Canandaigua, CMAC Performing Arts Center, Bristol Mountain Winter Resort
- Ontario County visitors satisfaction- 4.54 on a 5.0 scale
- Top amenities- Winery/Brewery experiences, quality of outdoor experiences, access to lakes
- Desired new experiences include: lakefront village with shopping and dining, cozy winter getaway package, trolley to wine tastings, evening entertainment district, 4 diamond lodging

Neighboring County Resident Points of Origin



Please tell us how we can improve the visitor experience.

- Access to lake difficult
- Access to water/view/picnic
- Activity announcements in local newspapers
- Additional parking at some venues
- Advertise events
- Advertise more, especially to Canadians
- Affordable
- All is good.
- Always enjoyable no complaints
- Attractions along the lakes
- Better access and signage for stream fishing and hunting on public lands.
- Better accessibility for wheelchair
- Better Dining
- Better parking at smaller wineries
- Better public transportation. UBER and LYFT!
- Better restaurants & more choices
- Better signage (2)
- Better swimming areas
- Boat rental not easily found
- Bring more mountain biking trails to the area
- Build a resort village across the street from Bristol Mountain.
- Canandaigua looks run down near Wegmans.
- Canandaigua needs more walkability - reduce lanes, add traffic circles.
- Cars speeding in crowded area as it is now become dangerous for all.
- Charge \$1/tasting instead of \$5/5
- Clean up downtown Canandaigua
- CMAC should have an electric sign by the parking lot advertising summer concerts
- Continue used frontline training/customer service
- Develop Ontario county park, harriet hollister and hi tor as destinations
- Dining available from a boat

Please tell us how we can improve the visitor experience.

- Discounts
- Discourage visitors from New Jersey
- Don't charge entry for art fests
- Excellent
- Experience excellent - nothing to improve
- Finger Lakes Trail should be multi-use including mountain biking
- Have more restaurants on Canandaigua lake
- Have passports at all the lakes, not just Keuka
- I'm always impressed with the Belhurst, not much to improve.
- Improve shoulders for bicycling
- Increase access to lakes
- Info on public access to water for kayaking
- Interested in Plein air event
- It is already pretty fantastic.
- Larger signage
- Leaf peeping activities or suggested routes for fall
- Less expensive Rieslings
- Less speed traps
- List of local restaurants and maps
- Live locally so not applicable
- Local tourism
- Look to Vermont for an example of how to do it
- Love it!
- Lower cost
- Make web sites for locating B & B more user friendly
- More advance notice of events
- More advertisement
- More advertising
- More advertising (the old Pennysaver had better, comprehensive listing of local events)
- More areas for public beach and water access to Canandaigua Lake.

Please tell us how we can improve the visitor experience.

- More cultural/arts events and venues - of a professional level (not simply community theatre, etc)
- More food opportunities in the Bristol Mountain area
- More free activities, like concerts
- More ice cream places near the lake
- More lake access
- More military discounts
- More music
- More night activities
- More places to launch boats in Geneva
- More promotions/advertising
- More public swimming sites
- More public transportation
- More restaurants
- More restaurants near Bristol Mountain
- More signage on roads entering to tell what, where regarding activities
- More signs
- More signs on route 64 to tell how many miles to Naples
- More wineries with music!
- Mountain biking is some of the best in the area
- Need more visual access to lake.
- No comment (3)
- No suggestions
- None (4)
- None -- it is great now
- None come to mind - doing a great job!
- Not aware of when the festivals are
- Not aware of where all the wineries are
- Not sure at this time
- Nothing
- Offer coupons

Please tell us how we can improve the visitor experience.

- Our drinking water is becoming more and more polluted.
- Outdoor activities
- Parking at the Ontario County Courthouse is horrible
- Package deals priced to entice those who live nearby to stay overnight
- Periodic specials to encourage exploring
- Poor public access to Canandaigua Lake
- Promote Skiing at Bristol Mountain especially to those outside Ontario County
- Promote trails
- Provide info on additional things to do in Ontario, NY when visiting
- Public Bathrooms for downtown shoppers
- Public beach lacking
- Public water activities
- Publicize free kayak launch sites
- Restrooms in Sonnenburg Mansion need to be improved
- Road construction on route 20 annoying.
- Roseland was terrific. Parking lot needs attention to look more welcoming.
- So close but don't get any magazines from that area
- Sometimes it can be difficult to find wineries as they sit far back
- Sonnenberg needs to plant more
- Stop building lake shore area up.
- Suggest providing a trolley from Canandaigua waterfront to downtown businesses in summer months
- Tractor trailers on Main Street? Really?
- Traffic congestion on Main Street Canandaigua is bad tractor trailers on Main Str?
- Traffic is extremely heavy, not sure how to improve this
- Traffic not good for CMAC
- Traffic through main road in Canandaigua is horrible
- TV ads
- Water access is being more and more difficult.
- Waterfront dining options

Please tell us how we can improve the visitor experience.

- We go with whatever is happening.
- We love it
- When trying to purchase Bristol/ rose land on line products web site does not work.
- Would love another water sports rental on mid or southern Canandaigua lake, or the tip of Seneca
- You do fine, we would like to do more in the finger lakes beside the casino but haven't had the time



Research Summary

Lodging Research Summary

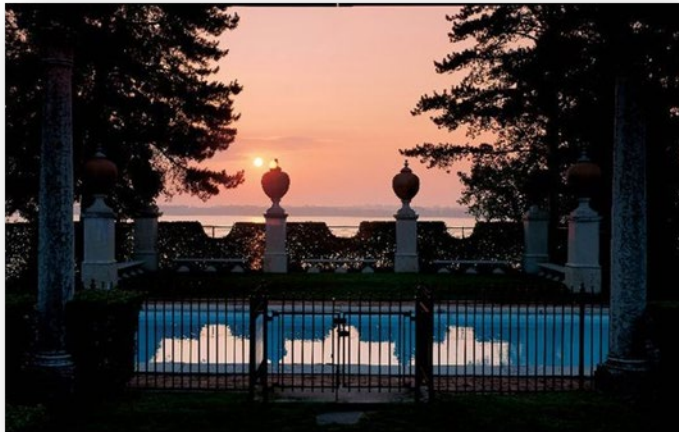
- Weekends outpace weekdays throughout the year. Summer weekends have the highest occupancy
- Sundays & Mondays are the lowest occupancy nights.
- Tuesday – Thursday nights remain below 60% occupancy 6 months of the year (January – April, November – December).
- Leisure weekend market is maxed out in peak season which requires shift to weeknights focus.
- Increase corporate small meetings group sales efforts focusing on New York State.
- Closer partnership with hotels on group sales strategy focusing on weeknights and November – April.



Visitor Survey Summary

- Average age of respondents is high at 52- 54. Baby-Boomers are most prevalent generation group followed by GenX, need to appeal to a younger demographic to drive maximum spending.
- Weekends: Younger travelers can come for weekends, holidays, long weekends and summer vacations (rentals).
- Weekdays: Target retired travelers and business meetings for weekdays.
- High repeat visitation = MATURE market meaning that most people within the 2-3 drive market know about or have visited the destinations within Ontario County. Growth comes from Pennsylvania and Ohio.
- High Satisfaction & Spending.
- Too much “leakage”, need to keep overnights in county as much as possible.
- Digital & social outpace traditional but don’t replace it anytime soon.
- Need additional unique, engaging outdoor and evening activities





Nimble Strategy

- Focus on periods when rooms are available
- November – April, weekdays
- Maintain existing dominance in leisure market within the Finger Lakes.
- Weekdays more than weekends
- Shift strategy to smaller groups & leisure
- Winter sports
- Digital & social + traditional
- Aggressive new approach to corporate meetings “THE place where business meets in western New York”.
- Three gateways – Victor, Geneva & Canandaigua - focus on greeting & keeping in the County to drive maximum spending & impact.

Berkeley Young,

Young Strategies, Inc

byoung@youngstrategies.com

704-677-4018

704-770-3333

www.facebook.com/youngstrategies

www.twitter.com/berkeleyyoung

www.youngstrategies.com

