

2017

ANNUAL REPORT

TOURISM IN MONROE COUNTY: A
BILLION DOLLAR IMPACT

PREPARED BY

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WELCOME LETTER

Dear Friends:

One look around our community makes it clear that Rochester is rising. In places throughout Monroe County, growth and forward progress is everywhere. The past year has continued to bring exciting changes to our community, which will influence the tourism and hospitality industry for many years to come.



Mr. Bill Gunther
Chairman of the Board



Mr. Don Jeffries
President & CEO

- Over the past year, several hotel properties in Monroe County have undergone total renovation and other updates and improvements. These investments help our core convention product remain competitive, while also attracting leisure visitors.
- We are also excited to see the near-completion of the renovation of the Greater Rochester International Airport (ROC). This important project, undertaken by Monroe County, will have a lasting impact on our region's visitor industry for many years to come. The ROC airport often serves as the very first impression to our area for thousands of visitors to our region every year. The improvements undertaken at the airport ensures that our visitors will get a taste of all that Monroe County has to offer, through new food and drink concepts, interactive exhibit space by The Strong Museum, enhanced security procedures, new smart technology and more.
- Additional updates are underway at another high-traffic destination in our area. Seneca Park Zoo recently marked significant milestones in its multi-year expansion, including a four-acre expansion of A Step into Africa, complete with the arrival of snow leopards, red pandas and giraffes to the zoo and our community.
- Monroe County's tourism and hospitality industry has had many groundbreakings to celebrate this past year. In addition to updates at the ROC airport and Seneca Park Zoo, our friends at The Strong Museum announced the start of its Powered by Play capital campaign and expansion project. The next few years will bring many exciting changes to The Strong, culminating in the Neighborhood of Play—a new, vibrant, walkable neighborhood, revitalizing the downtown area surrounding The Strong.
- As part of the State of New York's \$50 million investment in the ROC the Riverway initiative, a series of transformative projects alongside Rochester's Genesee River waterfront, work is underway on a rehabilitation project of the Joseph A. Floreano Rochester Riverside Convention Center's Terrace and Patio overlooking the Genesee River. This project will give greater access to the river way, as well as address ADA compliance and include updated lighting, furniture and landscaping. Work is expected to be completed by fall of 2019.
- Last, but not least, work is underway at the Rochester Museum & Science Center on the installation of a state-of-the-art, full-dome projection system and new open floor plan at the Strasenburgh Planetarium.

These are just some of the exciting changes and updates taking place throughout Monroe County. As these changes and updates continue, the Visit Rochester team remains poised to collaborate with the broader tourism industry to promote these updates, continue to generate awareness of Rochester and drive a demand for visitation through a number of programs and markets.

The team at Visit Rochester has been hard at work this past year. From meetings and conventions, to visitor services and membership, public relations and marketing, the entire team is engaged in several different programs that will bolster and grow the impact and effect of the tourism industry in Monroe County. Please read on in this report for updates on some of the key projects and programs our staff has been engaged with this past year.

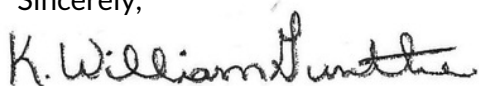
Tourism spending in Rochester and the Finger Lakes continues to grow. In 2017, the economic impact of tourism in Monroe County exceeded **\$1 billion**. The impact of traveler spending was also on the rise throughout the entire Finger Lakes region, with a total economic impact of \$3 billion.

As a regional leader in the tourism industry, we are proud to collaborate with both our partners across the region to promote Rochester and the Finger Lakes to audiences on a regional, national and international level. Visitors are important to Rochester and the Finger Lakes for many reasons. They create and help to sustain jobs – more than 19,000 in Monroe County alone – contribute to economic viability and help support the cultural richness of our community.

On behalf of the Visit Rochester staff, we would like to extend our gratitude to all of our members and partners, as well as County Executive Cheryl Dinolfo, Mayor Lovely Warren and our board of directors for your continued support of Visit Rochester's endeavors.

Thank you for being with us here today, and for your continued partnership with Visit Rochester.

Sincerely,



Mr. Bill Gunther
Chairman of the Board



Mr. Don Jeffries
President & CEO

BOARD OF DIRECTORS

A special thank you to the Visit Rochester Board of Directors, for their voluntary involvement in supporting tourism and the hospitality industry in Monroe County.

Fran Antonelli, Antonelli Development
Kate Bennett, Rochester Museum & Science Center
Hon. Dr. Joe Carbone, Monroe County Legislature
Virginia Clark, Constellation Brands
Craig F. Curran, DePrez Travel Bureau
Hon. Cheryl Dinolfo, Monroe County Executive
Corey Dooley, Rochester Hotel Association
Bob Duffy, Greater Rochester Chamber of Commerce

Fred Grabosky, Woodcliff Hotel and Spa
Chair Bill Gunther, Gunther & Associates, LLC
Rob Norris, Seabreeze Park
Joe Rulison, Three + One Advisors
Gregory Smith, Jay Advertising
Bill Strassburg, Wegmans Food Markets
John Urlaub, Rohrbach Brewing Company
Hon. Lovely Warren, City of Rochester

DEPARTMENT UPDATES



Creating "ROC Star" Moments in Rochester and Beyond

Visit Rochester's Visitor Services department was very busy in 2017. Visit Rochester's frontline employee training program, "ROC Star Training," grew in 2017, with 640 individuals representing 66 organizations undergoing the interactive training session. ROC Star training encourages frontline employees to be a "ROC Star" by using four easy steps: **Start** the conversation, **Tap** into resources, offer **Alternatives** and **Remove** obstacles when engaging with visitors and guests. Included in last year's hospitality training were more than 300 taxi cab drivers who work with countless visitors to our community every day.

Visit Rochester's focus on training the frontline employee is strategic. These employees represent many different roles within the tourism and hospitality industry – but each and every person that engages with visitors

to this community plays a critical role in the overall visitor experience. In providing this complementary training to frontline employees, Visit Rochester is able to help deliver a positive experience to all who visit Monroe County.

Another unique initiative the visitor services department is engaged in is its collaboration with several local colleges. Each August, representatives from Visit Rochester and its member organizations staff information booths at local college move-in days and orientations to help welcome the thousands of college students (and their families) who will call Rochester home during the academic year. In 2017, more than 1,700 students from local colleges, including the Eastman School of Music, Monroe Community College, RIT, University of Rochester and St. John Fisher College.

Meetings Mean Business in Rochester, NY

Meeting and event planners who visit Rochester on site visits and familiarization tours are quick to realize that there is no limit to what you can do when you meet in Rochester. In 2017, Visit Rochester's convention sales team hosted 61 different organizations for in-market site visits, exceeding the annual goal by **22%**. Each site visit is tailored to the needs of the visiting group or meeting planner, and includes tours of potential hotels, meeting spaces and, increasingly, unique off-site venues. Visiting meeting planners are often impressed by Rochester's unique venues, wide range of meeting properties and Visit Rochester's full service event planning team.

I made a site visit to Rochester last week and was very impressed with your city. You developed a tour that more than met my needs.

It [statewide convention] was virtually flawless. I really could not have asked for a better response to our many needs.

Rochester is a great small city destination that does not get enough recognition. Every event planner should consider it when sourcing destinations.

Providing Exceptional Service to Rochester Event Attendees

Visit Rochester employs a full-time event services department focused on connecting meeting, convention and sporting event attendees with a wide range of services in the community to ensure the greatest economic impact of each visiting group. The event services team exceeded all department goals set for 2017. In the past year, the department provided services to **273 organizations** meeting in Rochester, while issuing **more than 150 leads** to Visit Rochester members to work with/service these visiting organizations. Event leads included information and welcome amenities, offsite venue leads, as well as transportation and dining needs.

Additionally, in 2017 Visit Rochester's event services team began supporting service needs for visiting sporting events and tournaments, in collaboration with the sports commission.

Monroe County Sports Commission and Visit Rochester: A Winning Team

As of January 1, 2018, the Monroe County Sports Commission officially joined Visit Rochester as a division within the sales team as the new Rochester NY Sports Commission. 2017 marked the start of the transition as the two teams began combining systems, processes and service opportunities for groups. This new partnership will give the sports commission greater resources to attract sporting events and tournaments to Rochester and Monroe County.

Rochester, NY – One of America's Favorite Cities

Travel + Leisure readers showed a lot of love for Rochester in the 2017 America's Favorite Places reader survey. In fact, Rochester appeared on 5 different reader rankings, including:

- Rochester is in the top ten for America's Favorite Cities! Our community ranked #10 on list of America's Favorite Cities, with readers mentioning the community's outdoor activities, public market, and proximity to the Finger Lakes region.
- #17 on list of America's Friendliest City, with a reader noting, "people are genuine."
- Readers ranked Rochester #16 when it comes to America's Favorite Cities for Food! For foodies, Rochester was recognized for its "craft beer, comfort food, and coffee roasters."
- Is Rochester "underrated?" At #7, we sure are! Readers cited Rochester's museums, restaurants, public market, and nearness to the Finger Lakes as assets not particularly known to those outside the area.
- Grab your skis! Rochester was recognized on Travel + Leisure's list of America's Favorite Ski Destinations -- coming in at 6. Readers in this category recognized Bristol Mountain, a 1200 ft peak (the tallest drop between the Adirondacks and the Rockies) just south of Rochester.

Telling the Rochester Story to the Rest of the World

Visit Rochester's Public Relations and Communications department continued to share the Rochester story with travel writers and bloggers from around the world in 2017. This past year, Visit Rochester welcomed more than 70 journalists and bloggers to Monroe County on press trips.

One of the highlights of the year occurred when Rochester was selected to host the **Macaroni Kid Silver Daisy Boondoggle** – a 50 person, three-night/four-day media familiarization tour focused on Rochester's family-friendly features and attributes.

The results for this program exceeded expectations for both Visit Rochester and our partners. The press trip and partnership with Macaroni Kid led to 58 articles featuring Rochester as a family-friendly destination, hundreds of social media posts from press trip attendees, and a combined total of more than 11.6 million media and social media impressions. The program was recognized in 2018 with a PRism Award by the Public Relations Society of America, Rochester Chapter.

MARKETING UPDATES



A Collaborative Approach to the Travel Trade Market

Visit Rochester's outreach to the travel-trade in 2017 reached record levels as the Visitor Industry Council's *Travel Trade and Group Tour Sales Committee* undertook six sales missions and attended five major tradeshow to make face-to-face presentations to over 200 tour planners and motor coach companies. Visit Rochester supported the program under its new incentive-funding model that provides financial support to members interested in this market who work through the committee structure.

Researching Rochester

A baseline research project to evaluate potential travelers' perceptions about Rochester got underway in 2017. An engagement with Simon Graduate School of Business at the University of Rochester provided keen insight into the various perceptions and views of Rochester in terms of its profile and view of it as a leisure destination. A committee comprised of Visit Rochester members is continuing the process in 2018.



Wine, Water and Wonders of Upstate New York Reaches International Visitors

Targeting existing overseas travelers making their way from NYC to Niagara Falls is accomplished through a major State program that Visit Rochester helped create. The Wine, Water and Wonders of Upstate New York program, through partnerships and contractors was actively present and accomplished the establishment of distribution channel agreements in Europe and Asia. Additional marketing programs in NYC helped solidify Rochester as a primary stop in Upstate New York travel itineraries sold overseas through travel wholesalers.

Cross Border Showcase

The largest private/public Canadian marketing partnership in New York State history was created by Visit Rochester in 2012 and hit its peak in 2017. The program, Cross Border Showcase, grew to nearly 30 partners and destinations and reached over 2 million Canadians. At least 20,000 Canadians are estimated to have visited the Rochester areas during 2017 with expenditures in excess of \$4 million. Partners that engaged in the program over multiple years reported elevated visitation from Canada. The program's administration transitioned in 2018 to production by marketing partners who are continuing it into the future.

NYC Presence and Market Development

The awareness of Rochester in the New York City area as a “the” Upstate destination and location for visiting, living, learning and investment moved ahead in 2017. The partnership between Visit Rochester, Delta Airlines, Greater Rochester Chamber of Commerce and the Greater Rochester International Airport works to identify and cultivate at least 200 influential NYC- based individuals who then help spread the word through introductions and engagement. In 2017, efforts were restructured and the program’s graphic identity was updated.



The Families with Kids Market

Given the abundance of family friendly attractions, activities and properties in and around Rochester and the Finger Lakes, Visit Rochester has the opportunity to help position the region as the premier destination for families with kids in the northeastern United States. In December of 2017, a consolidated funding application was awarded in the amount of \$60,000 to grow the market in 2018-2019 with a new campaign called *Bring the Family. Closer.* This new program will target families in the Capital Region and Hudson Valley region of New York State.

Rochester: The Perfect Base

Visit Rochester’s messaging as the Perfect Base for your Visit! was used in regional publications and ad campaigns to tout Rochester’s lodging, features and service selection as the perfect reason to stay in Rochester and explore the Finger Lakes, Genesee Valley and Niagara Falls from here. The program’s graphic identity was incorporated to feature Visit Rochester’s identity as “Limitless.”

Publications and Print Collateral

Explore Greater Rochester: In 2017, Visit Rochester once again partnered with the Rochester Business Journal to create and produce 150,000 copies of Explore Greater Rochester Guide, the official visitor’s guide to Greater Rochester and Monroe County. Explore is used as the primary collateral piece shared with prospective visitors who request information on our area. The visitor’s guide is also distributed to meeting and convention delegates visiting the Greater Rochester area. Explore is available to visitors at local hotels, area attractions, visitor information centers and the Greater Rochester International Airport. Rochester Business Journal subscriber also received a complimentary copy of the guide with the April 14 edition of the paper.

Downtown Dining Guides: The Visit Rochester event services team developed an updated Downtown Dining Guide, in partnership with City Blue Imaging Services. The downtown dining guide is a valuable resource for downtown meeting, convention and other special event attendees. With so many new restaurants opening up in downtown Rochester, the team worked on a new design that was visually appealing, engaging for readers and easy to update as new restaurants open up. More than 30,000 copies have been printed and distributed.

Special Market Niche Cards: A broad redesign of Visit Rochester’s ten special market rack cards was completed at the end of 2017. The redesign presented an opportunity to refresh the overall look and feel of the special market rack cards as well as content. The rack cards provide a way for Visit Rochester to market each of the special markets (among others) that have been identified as primary targets for Monroe County. These markets include: Family Travel, Flowers, Hike/Bike/Paddle, Food and Drink, Women’s History, African-American History, Dance & Theatre, Photography & Film, Shopping, and Music.

AWARDS & HONORS

A very special congratulations to the sales and services departments of Visit Rochester for the following honors awarded in 2017:

Platinum Choice Award Winner

Smart Meetings Magazine

Deidre Wetelainen

Vice President of Convention Sales and Services

recognized by Connect Association as a 40 under 40 honoree

Amanda Pfeil

Director of Event Services

named a rising star by Smart Meetings

2017 NEW MEMBERS

Anderson Alley Artists

Brand Connect Innovations, LLC

Comedy @ the Carlson

Country Inn & Suites by Carlson - Rochester/Pittsford

Del Lago Resort & Casino

Diji Signs, Inc.

Domino's

Eastman Business Park

Effortlessly Healthy

Flower City Food Tours

Funk 'n Waffles

Ganondagan State Historic Site

Hampton Inn Rochester-Penfield

Jeremiah's

Kettle Ridge Farm

Mach 2 Management, Inc.

McCarthy Tents & Events

Morton's Steakhouse

Penfield Public Library

Radio Social

Rochester Arc + Flame

Scott Brown Media Group

Shelly's Sweet Shoppe

Spa Elan at Woodcliff Hotel & Spa

Texas Bar-B-Q Joint

The Dome Arena

The Inn on Church

Victor Chamber of Commerce

Wacky Buttons

TOURISM IN MONROE COUNTY

By The Numbers

\$1B

ECONOMIC IMPACT OF TOURISM ON MONROE COUNTY

\$1,052,556,000

Lodging:	\$298.6 M
Recreation:	\$50.5 M
Food & Beverage:	\$318.7 M
Retail:	\$189.8 M
Transportation:	\$188.4 M
Second Homes:	\$6.6 M

\$568M

LABOR INCOME

19K

19,581 EMPLOYED IN MONROE COUNTY

\$139M

TAXES COLLECTED

Local Taxes:	\$81.5 M
State Taxes:	\$57.9 M

- In the Finger Lakes Region, total traveler spend/economic impact is \$3 billion and supports 58,539 jobs.
- Monroe County represents 35% of the total regional traveler spend.
- Traveler spending in the Finger Lakes increased 2.4% in 2017.
- 3.3% of all labor income in the Finger Lakes is generated by tourism.
- Tourism generated state and local taxes, saved the average household in Monroe County \$495.

***Figures provided by Tourism Economics,
an Oxford Economics Company.