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A TOURISM MARKET/RURAL HUB ANALYSIS:  
THE CASE OF  
GENESEE COUNTY, NEW YORK

by

Tammy L. Thompson

A thesis submitted to the  
Faculty of the School of Food, Hotel and Travel Management  
at  
Rochester Institute of Technology  
in partial fulfillment of the requirements  
for the degree  
of

Master of Science

October 1991

**FORM I**

**ROCHESTER INSTITUTE OF TECHNOLOGY**  
**School of Food, Hotel and Travel Management**  
**Department of Graduate Studies**

**M.S. Hospitality-Tourism Management**  
**Presentation of Thesis/Project Findings**

Name: Tammy L. Thompson Date: 10/30/91 SS#: \_\_\_\_\_

Title of Research: A Tourism Market/Rural Hub Analysis: The Case of Genesee County

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In memory of my grandfather

Manuel J. Busto

## ABSTRACT

Tourism planning is essential for counties like Western New York's Genesee County. It provides the opportunity to maximize tourism potential, thereby increasing County revenues.

This study analyzed tourism of Genesee County in 1990. Some of the major findings were the following: there was a strong market of tourism in Genesee County, not only coming from within New York State, but also surrounding states and Canada. There was also a strong tendency for visitors to go directly to the Northwest after their stay in the County. In general, the typical tourist to Genesee County was described by the following characteristics: was married; had no children; resided in New York State; was a professional with an annual household income between \$30,000 and \$40,000; traveled to Genesee County as a primary destination on vacation; stayed from one to three days at a campground; arrived by personal vehicle either with one other person or with four people who were a immediate family; used a mailed request to obtain information on the area; was aware of Darien Lake Theme Park and Camping Resort, outlet factories, camping facilities, historic locations, and museums

and visited or participated in the same; spent between \$16 and \$60 per day per party on accommodations; spent between \$11 and \$20 per day per person on food/meals; spends between \$6 and \$15 per day per party on transportation; spends between \$6 and \$20 per day per party on attractions/events; spends \$15 or less per day per person on personal items; has visited Genesee County at least more than five times; and rates visits to Genesee County an 8 (10 = highest).

## CHAPTER 1

### INTRODUCTION AND STATEMENT OF STUDY

#### INTRODUCTION

Historically, there has been relatively little data available with which to evaluate the relationship between visitors and their contribution to the economy of counties like Genesee. Genesee County offers a variety of touristic resources which both directly and indirectly contribute to its economic base. Yet, the economic contribution that each attraction derives in terms of market segment and their specific spending patterns are difficult to assess. In part this problem exists because of the proprietary nature of these touristic establishments and their tendency of not sharing information. Even when such information was shared, it typically was not standardized and therefore difficult to generalize to any other touristic enterprise.

This study was not an attempt to generate a statistical model where any host county or tourism agency may develop a strategic marketing plan to attract a certain tourist market to the given locale. Rather, it was an attempt to

substantiate the economic and social importance of tourism planning to maximize tourism potential for Genesee County.

### **PROBLEM STATEMENT**

Genesee County needed to know more specific information concerning the characteristic of its market. This study can help guide Genesee County maximize tourism potential by serving as a guide to future studies of Genesee County and similar rural counties, and bringing revenue into Genesee County, Upstate New York and New York State as a whole.

### **PURPOSE OF STUDY**

The purpose of this study was two-fold. First, to identify the tourist market of Genesee County, in terms of: their general demographic characteristics, awareness of area tourist attractions, and economic expenditures. Second, it was to determine the spatial relationship to and from Genesee County as a "hub" destination.

## SCOPE AND LIMITATIONS

The scope of the study was limited to Genesee County. Data collection was limited to the summer of 1990. All participation was voluntary with no monetary incentives provided to participants.

## ASSUMPTIONS

- 1) The sample size taken was representative of the population of visitors to Genesee County.
- 2) Merchants in Genesee County would want to cooperate with the study because they understood the economic benefits for them in the long run.
- 3) The County functioned as a hub attracting visitors who utilized its central location in visiting nearby, yet out-of-county, tourism attractions.

## DEFINITION OF TERMS

- Hub and Spoke - A distribution concept; for airlines, routing that utilizes a city (hub) in the center in a number of short flights (spokes) to outlying markets. All flights stop at the hub, using it as a staging area for passengers. In nonairline application the concept might involve use of a central receiving/storage facility or a preparation kitchen that in turn supplies the product for a network of retail outlets.
- Rural Tourism - A type of tourism that bases its appeal and offered services on some aspect of the real or imagined rural, nonurban way of life: the vast, quiet, unrushed countryside, varieties of trees and animals and so forth.
- Tourismagnetic Area- A place where tourism has become the major source of income and the major

cultural influence. Also, an area that draws tourists.

Tourism Planning - The process of determining the future of tourism by the analysis of present facts, the identification of desired goals, and the establishment of strategies to obtain desired goals. Also, the process of identifying and linking necessary components of an area into a tourism system.

The remainder of this thesis will first review brief background literature of Genesee County, tourism planning, tourism in rural areas and the hub and spoke concept. Following will be an explanation of the methodology used in the study, major findings, conclusions and recommendations for further study.

## CHAPTER II

### REVIEW OF LITERATURE

#### INTRODUCTION

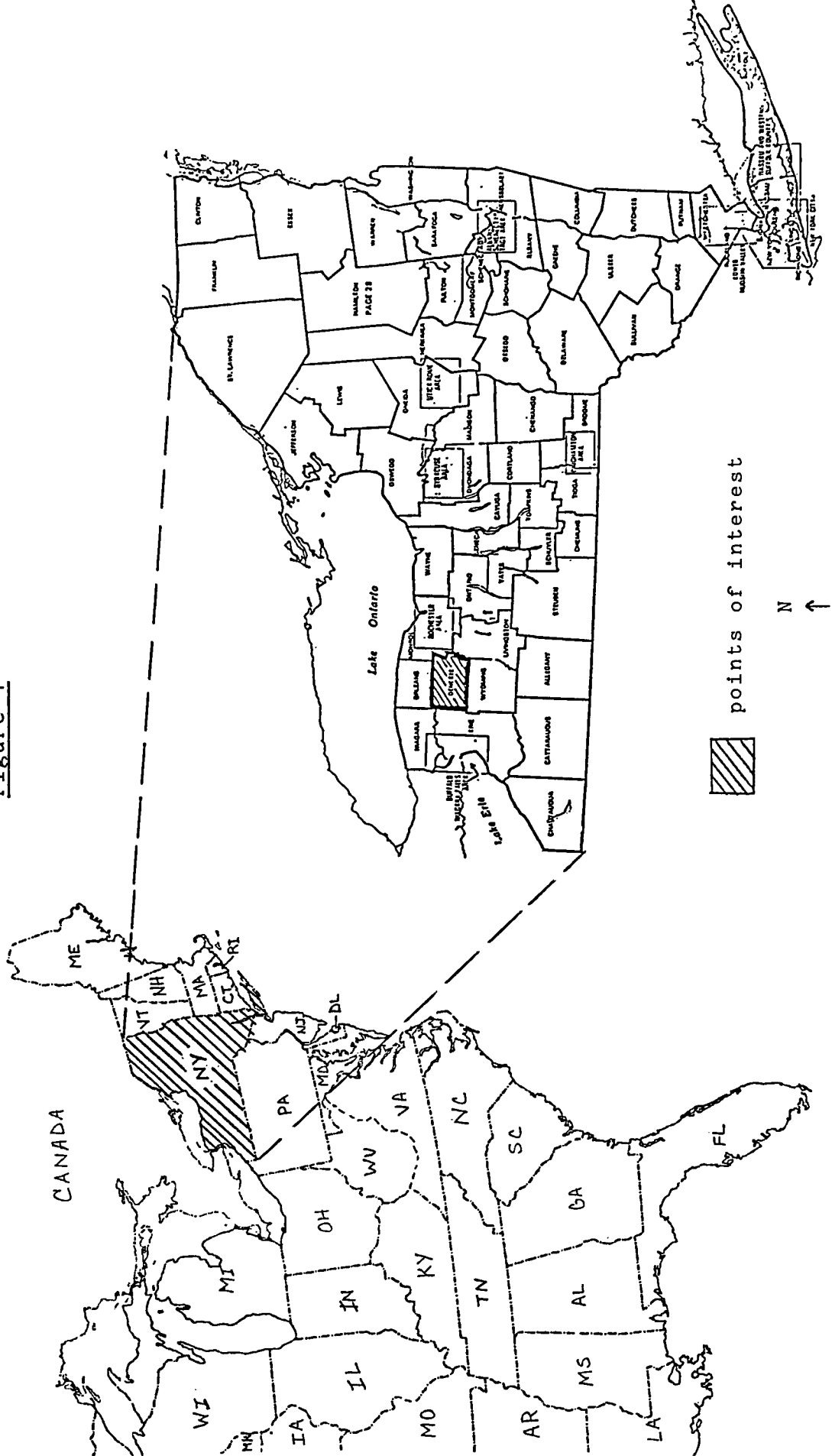
This chapter provides background information on Genesee County necessary to understand the County and its beginnings. It also explains the hub and spoke concept and how it relates to Genesee County. Finally, there is an overview of tourism planning and development. The overview explains the advantages (and some disadvantages) of tourism, the process of planning, and development goals.

#### GENESEE COUNTY HISTORY

Genesee County is located west of the Genesee River in New York State, Northeast United States of America (see Figure 1). Home first of the Seneca Indians, the land we know as Genesee County was called Tyron County (after an English colonial governor) in the early 1700s. Then, during the Revolution, colonists named the County, Montgomery, after a Revolutionary patriot. In 1786, after the Revolutionary War,

# GENESEE COUNTY'S POSITIONING IN NEW YORK STATE AND THE UNITED STATES

Figure 1



the County was owned by Massachusetts but governed by New York. In 1788, the County was renamed again, this time Ontario. Then in 1791, Robert Morris (a signer of the Declaration of Independence and the Constitution) purchased the land, but later sold it in 1793 to the Holland Land Company, which was comprised of six banking houses of Amsterdam. This did not mean, however, that the land was available for settlement. It still really belonged to the Seneca Indians. This was rectified by the Sullivan-Clinton Expedition, and the Big Tree Treaty of 1797. The agreements let the Senecas retain 200,000 of the 4 million acres of land for a reservation and gave them the rights to the interest from federal stocks and bonds.

In 1802 this land was still a part of Ontario County, had high land taxes and was quite a distance for settlers to travel to record deeds. It was for these reasons that it was created into its own county. The County was named Genesee, which is an Indian word meaning "beautiful valley." The land was then settled by many immigrants and New Englanders. The name Batavia, central city of Genesee County, was chosen to honor the Dutch land owners, for the name came from the Republic of Batavia which was an area in the Netherlands before 1806. The early pioneers who left their barren, rocky

New England farms looking for a chance at a more prosperous life, regarded Western New York as "the Eden of the East," and today Genesee County still maintains a proud agricultural heritage. The County is noted for its open countryside, forested parcels, quaint hamlets, and traditional architecture. Travelers passing through the area notice the seemingly endless acres of corn, the large fields of lush green sod, and the vast expanses of rich black muckland where millions of onions and lettuce are harvested each year (Swanson 1988).

#### CLIMATE

Since Genesee County is located so close to the Great Lakes, its winters are hard and long with abundant snowfall and extensive cloudiness during the months of November, December, and January. Summers are usually moderately warm with reliable amounts of precipitation. During the fall the lakes retain heat thereby lengthening the frost-free period, but at the end of the spring they keep the area cool, which can delay late frost damage to plants. The growing season is from 140 to 180 days (Swanson 1988). The terrain in the County is mostly flat plains.

## TRANSPORTATION MEANS

### Canals

On July 4, 1817, in Rome, New York, the construction of the Erie Canal began and seven years later finished at Buffalo on Lake Erie at a total cost of nearly \$8 million. The total length was 363 miles, and the canal descended approximately 500 feet with the use of eighty-three locks (Swanson 1988). The coming of the Erie Canal made marketing easier for the Western New York settlers. The competition from the canal put out of business many of the east and west stage lines although a number of local lines still connected the interior towns and villages with the canal. Although, by the time the canal was opened, the area crossed by the canal was no longer a part of Genesee County, the canal affected the economy of the whole region (GC Appointed Historians 1985). The canal not only brought a new means of transportation to Western New York, but it also brought more settlers. Some of these were Irish who worked on the canal, others were wealthy men from the south and east. Most of the Irish residents of the area came later, however, in the 1840s and 1850s.

## Railroads

The coming of the railroad to Genesee County was one of the most important occurrences in its history. Well before the end of the Nineteenth Century every town had some railroad service. Between 1840 and 1860 the railroads overtook canals as the major form of transportation. In the United States, railroad trackage increased from 2,818 to 30,600 miles, in comparison to the canals, which grew marginally from 3,300 to 3,700 miles (Swanson 1988). Genesee County, like most regions adjacent to railroads, benefitted a great deal. In the peak of the railroad era six railroads traversed the County. As a result, factories formed and villages grew. More forests were cleared for farming, settlements, the railroads, and the timber for the construction of the railroads.

## Paved Roads and Highways

Rural roads in the 1800s were extremely poor and were nothing more than mud puddles. Eventually increased automobile traffic forced the construction of paved roads. By the 1920s the good roads movement was in full swing with a catchy slogan, "Get the farmers out of the mud" (Swanson 1988). By 1924 over 31,000 miles of concrete roads were in place, 430,000 roads totally in the United States. As the

number of automobiles increased, road conditions improved and by 1925 the number of roads increased to one-half million. The growth of the automobile spurred long overdue road development and by 1930 paved public roads became common.

Currently, Genesee County is easily accessible. The New York State Thruway, part of the chain of interstate highways heading east, west, and south has an exit at Batavia's front door. New York State's major cross-state artery, historic Route 5, is Batavia's Main Street. Key north-south routes 98 and 63 pass through Batavia as does east-west route 33. Route 20, another scenic cross-state highway, is only a few miles south of the city. The County has various touristic cities in the immediate surrounding areas. Some of these include: Rochester, Buffalo, Niagara Falls, and Canandaigua. Genesee County, as shown here, has an excellent location and is easily accessible as a "hub" destination.

#### HUB AND SPOKE DESTINATIONS

The hub and spoke concept is usually used in conjunction with airport hubbing. The concept is merely one of distribution. In airport hubbing, a centralized city is used

as a staging area for passengers. Large carriers bring passengers into the centralized city, which is called the hub, to connect on another flight to their primary destination. According to Bill Berry of Delta Airlines, the primary factor for airlines in designing a hub city is suitable geographic location. The city must complement the airlines existing service, must be a frequently used destination, and must have smaller cities nearby to act as feeders (Wolf 1986). The flights into and out of the hub are referred to as spokes. The magnitude of the spoke depends on the demands of the people who wish to fly. A flight that is in high demand creates a strong spoke, and therefore needs a large carrier. A flight in lower demand creates a weaker spoke, and therefore can utilize a smaller, perhaps a commuter carrier (eg. smaller jets or prop planes).

This concept can be easily adapted to Genesee County's tourism. Instead of a single city acting as the hub, the County as a whole can be the hub. Each of the many attractions around the County and the cities feeding into the County serve as the spokes. As will be illustrated in Chapter IV, some spokes are stronger than others. These, in the airport hubbing model, would be the ones that use the larger aircraft carriers. In the Genesee County model, these would

be the spokes that should be studied in tourism planning and development.

## TOURISM PLANNING AND DEVELOPMENT

Tourism is a growth industry, and while that growth may show some slowing in the short run, the long run prospects are great. The expected continued growth is based on continually rising per capita incomes, lower travel costs, increased leisure time, and changes in consumers' tastes and preferences toward travel, recreation, and leisure goods and services. A review of some advantages and disadvantages arising from tourism development will indicate why careful planning is necessary. (The list of advantages/disadvantages came from McIntosh, Goeldner 1990.)

Some major arguments for tourism are that it:

- 1- Provides employment opportunities, both skilled and unskilled, because it is a labor-intensive industry
- 2- Increases incomes
- 3- Requires the development of an infrastructure that will also help stimulate local commerce and industry
- 4- Justifies environmental protection and improvement

- 5- Increases governmental revenues
- 6- Helps to diversify the economy
- 7- Provides tourist and recreational facilities that may be used by a local population who could not otherwise afford developing facilities

Some disadvantages of tourism are that it:

- 1- Diverts funds from more promising forms of economic development
- 2- Degrades the natural physical environment
- 3- Degrades the cultural environment
- 4- Increases vulnerability to economic and political changes
- 5- Adds to inflation of land values and the price of local goods and services

The disadvantages listed cannot truly be blamed on tourism, however, but rather on overcommercialization. Tourism is one of the world's greatest and most significant social and economic forces. But government officials and business people must weigh the economic benefits against the possible future degradation of human and natural resources. Tourism development must be guided by carefully planned policy, a policy not built on balance sheets and profit and loss statements alone, but on the ideals and principles of

human welfare and happiness. Social problems cannot be solved without a strong and growing economy that tourism can help create. Sound development policy can have the great result of a growing tourist business and the preservation of the natural and cultural resources that attracted the visitors in the first place. Planning can ensure that tourist development has the ability to realize the advantages of tourism and reduce the disadvantages (McIntosh and Goeldner 1990).

The eight step planning process suggested by Robert W. McIntosh and Charles R. Goeldner (1990) is as follows:

- 1- DEFINE THE SYSTEM: What is the scale, size, market, character, and purpose?

In this study of Genesee County, this was accomplished in the first meeting with the County.

The purpose of Chapter I was to define the system.

- 2- FORMULATE OBJECTIVES: Without a set of objectives the development process has no direction. The objectives must be comprehensive and specific and should include a timetable for completion.

In this study, objectives were formulated in the first meeting also. These objectives were used to construct the survey instrument. The County wanted to know specifically: who visits Genesee County;

which attractions do the visitors visit or participate in and which do they know about; where do visitors go after visiting the County; how much money do they spend while in the County; how many times they have visited; and how did they rate their visit. The data collection was to be completed by fall of 1990.

- 3- DATA GATHERING: Fact finding, or research, provides basic data that are essential to developing the plan. Examples of data gathering are preparing a fact book, making market surveys, undertaking site and infrastructure surveys, and analyzing existing facilities and competition. According to John McDonald of Market Opinion Research in Detroit Michigan, "Cities need to research who their visitors are, where they come from, and why in order to target their marketing efforts. Local universities can help with this" (Kane 1988). This is the type of research performed in this study.

This study utilized a market survey instrument based on the County's objectives. The survey is explained in Chapter III.

- 4- ANALYSIS AND INTERPRETATION: Once collected, the many fragments of information must be interpreted so the facts gathered will have meaning. From this step results a set

of conclusions and recommendations that leads to making or conceptualizing a preliminary plan.

The study's analysis and interpretation is in Chapter IV. It was analyzed in an SPSS-X software program through frequency analysis and crosstabulations. Chapter V displays the conclusions and recommendations of the study.

Steps 5 through 8 are not included in this study.

- 5- PRELIMINARY PLANNING: Based on the previous steps, alternatives are considered and alternative physical solutions are drawn up and tested. Frequently scale models are developed to illustrate the land-use plans; sketches are prepared to show the image the development will project; financial plans are drafted from the market information, site surveys, and the layout plan to show the investment needed in each phase of the project and the cash flow expected; and legal requirements are met.
- 6- APPROVING THE PLAN: The parties involved can now look at plans, drawings, scale models, estimates of costs, estimates of profits, and know what will be involved and what the chances for success or failure will be. While a great deal of money may have been spent up to this point, the sum is a relatively small amount compared to

the expenditures that will be required once the plan is approved and master planning and implementation begin.

- 7- FINAL PLAN: This phase typically includes a definition of land use; plans for infrastructure facilities such as roads, airports, bike paths, horse trails, pedestrian walkways, sewage, water and utilities; architectural standards; landscape plans; zoning and other land-use regulations; economic analysis, market analysis, and financial programming.
- 8- IMPLEMENTATION: Implementation carries out the plan and creates an operational tourism development. It also follows up and evaluates. Good planning provides mechanisms that give continuing feedback on the tourism project and the levels of consumer satisfaction achieved.

Good planning should eliminate problems and provide user satisfaction. The final user is the judge in determining how successful the planning process has been. Tourism development should aim at: providing a framework for raising the living standard of the people through the economic benefits of tourism; developing an infrastructure and providing recreation facilities for visitors and residents alike; ensuring types of development within visitor centers and resorts that are appropriate to the purposes of those areas;

establishing a development program consistent with the cultural, social, and economic philosophy of the government and the people of the host county; and optimizing visitor satisfaction (McIntosh, Goeldner 1990). Keeping the steps of tourism planning and development goals in mind, there is no reason that the rural Genesee County cannot be a tourismagnetic area.

## CHAPTER III

### METHODOLOGY AND RESEARCH DESIGN

#### INTRODUCTION

The study of Genesee County was broken into three separate markets of visitors, the potential, the current, and the historical markets. A survey was used to obtain the necessary data. The data was entered into an SPSS-X program where frequencies and crosstabulations were performed. The length of time from beginning to completion was approximately four months.

#### SAMPLE SELECTION

The selection of potential visitors for the potential market was supplied by the Genesee County Chamber of Commerce, Inc. The list of names and addresses consisted of those people who had requested information on the County. These names and addresses, when acquired, were then entered into a Dbase file.

The random selection of visitors for the historical market was determined in the following manner. Visitors were categorized on the bases of accommodation types. For this study these are: campgrounds, hotels, and bed and breakfasts. The number of rooms and campsites was determined. Each accommodation category was assessed as a percentage of the total rooms and sites available. Further, within each type, the specific campgrounds, hotels and bed and breakfasts received their own percentage of the category total. For example, Darien Lake Theme Park and Camping Resort accounted for eighty-seven percent (87%) of the total campsites. Once the percentages were tabulated, the sample size was then calculated. The historical mailings consisted of 1200 surveys. This was stratified as follows: campgrounds, which accounted for eighty-six percent (86%) of the grand total, had a sample size of 1032; hotels, which accounted for thirteen percent (13%) of the grand total, had a sample size of 156; and bed and breakfasts, which accounted for one percent (1%) of the grand total, had a sample size of twelve.

Within each category, the sample was broken up similarly. For example, the campground category was broken up as follows: Darien Lake Theme Park and Camping Resort accounted for eighty-seven percent (87%) of the campsite total and received

a sample size of 898; Darien Lake State Park at seven percent (7%), seventy-two (72); and Lei-ti at six percent (6%), sixty-two (62), the rest of the 1032 sample size of the campground accommodations category. The hotel and bed and breakfast categories were broken up similarly. See Table 1 for complete breakdown.

The sample size for the current market was calculated in the same manner, so that the same number of historical and current surveys could potentially be received from the same source. For example, Darien Lake State Park was given seventy-two (72) surveys for their current guests to fill out, and seventy-two (72) of their former guests were sent the surveys from the historical market.

SAMPLE SIZE BREAKDOWN FOR HISTORIC AND CURRENT MARKETS

Table 1

<u>Accommodations</u>	<u>% of Total</u>	<u>Sample Size</u>
Campgrounds:	86	1032
Hotels:	13	156
Bed & Breakfasts:	<u>1</u>	<u>12</u>
Totals:	100	1200

**Campgrounds**

Darien Lake Theme Park	87	898
Darien Lake State Park	7	72
Lei-Ti Recreation Resort	<u>6</u>	<u>62</u>
Totals:	100	1032

**Hotels:**

Holiday Inn	51	80
Treadway Inn	22	34
Darien Lake Motel	21	33
Mister David Motel	<u>6</u>	<u>9</u>
Totals:	100	156

**Bed & Breakfast:**

The Hens Nest	100	12
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The names and addresses that were received from campgrounds, hotels, and the Genesee County Chamber of Commerce, Inc. were entered into the same Dbase file as the potential market. This file was then used to create labels for the four mailings. It will be a very useful file for future reference of historic and potential visitors.

### **SURVEY INSTRUMENT DESIGN**

The survey instrument developed for this study was a twenty-two item questionnaire. The survey consisted of questions typically associated with tourism supply studies. These included: type of party, number in party, place of origin, marital status, number of children, type of occupation, purpose of stay, length of stay, type of stay, primary destination or stopover, other primary destinations outside of Genesee County, type of accommodations, means of transportation, source of information, attractions awareness, attractions visited, annual income, accommodations expense, food expense, transportation expense, attractions expense, personal items expense, satisfaction of stay, and number of visits to Genesee County.

## QUESTIONNAIRE DRAFTING

Since the study consisted of three separate markets, there were three separate surveys. Each survey was basically the same with only a few distinctions. First, the tenses were different. For example, the potential was phrased as, "Were you to travel to Genesee County, which would best describe....," the current was phrased as, "Which best describes....," and the historical was phrased as, "Which best described...." Second, the potential and historic market's questionnaire were sent with a cover letter, while the current market's questionnaire had a brief explanation of the nature and importance of the study at the top of the questionnaire instead of a cover letter. Third, the current and historic markets had two extra questions dealing with the respondent's satisfaction of their stay in the County. Please refer to Appendix A to view each questionnaire.

## QUESTIONNAIRE CONTENT

This survey instrument was comprised of six types of questions:

1. Demographic questions describing the respondents which was needed to determine the "typical visitor."
2. Questions describing the visitors' stay.
3. Questions describing the visitors' positioning to and from Genesee County.
4. Questions determining the visitors' knowledge of Genesee County and their source of knowledge.
5. Questions determining actual/potential expenditures in the County.
6. Questions determining their satisfaction with their stay.

Question one (1) identified the type of party that traveled (or would travel) with the respondents. It listed specific groups to be selected by the respondents. This question was later used to aide in determining the profile of a typical visitor to the County.

Question two (2) identified the number of persons who made up (or would make up) that party selected in question one (1). This question aided in determining the profile of a typical visitor to the County, and also was used to determine potential revenues for Genesee County.

Question three (3) consisted of three variables. It first revealed the city of origin, then the state or province of origin, then the zip code of origin of the respondents. This question was later used to determine the respondents' positioning to the hub destination Genesee County and the visitor profile.

Question four (4) determined the marital status of the respondents. It then listed all marital statuses, one to be checked by the respondents. This information was used to identify demographic information and contribute to the visitor profile.

Question five (5) identified the number of children the respondents have. It then listed responses from "none" to "more than five" to be chosen. This information was also used to determine demographic information and contribute to the visitor profile.

Question six (6) revealed the respondents' occupation. It then listed seventeen choices of occupations with the eighteenth choice being "other" to be filled in. This information, again, was used to determine demographic information and contribute to the visitor profile.

Questions one through six identified demographic information about the party traveling to Genesee County. Questions seven, eight, the first part of nine, and ten and eleven described the visitors' stay.

Question seven (7) identified the main purpose of stay in Genesee County. Listed as choices were: vacation, business, visit friend/relative, a specific event, other (please specify). The information obtained described the stay and was used in determining the visitor profile.

Question eight (8) identified the respondents' length of stay in Genesee County. Choices ranged from "less than one day" to "more than one week." The information obtained also described the stay and was used in determining the visitor profile.

Question nine (9) had two parts. The first part determined if the respondents' stay was (or would be) a primary destination or a stopover. If the response was a stopover, then the respondents proceeded to part two. Part two determined where the primary destination was (or would be). It was broken into four sections, the Northeast, the Northwest, the Southeast, and the Southwest. Each section then listed attractions in those areas to be selected. This question was used in determining the respondents' positioning from the hub Genesee County. It was also used in describing the stay in the visitor profile.

Question ten (10) revealed the type of accommodations used (or would be used) by the respondents. Choices listed were: campgrounds, bed & breakfasts, hotel/motel, family/friends, not staying in Genesee County. The information obtained describes the respondents' stay and was used in determining the visitor profile.

Question eleven (11) determined the means of transportation used (or would be used) by the respondents to reach Genesee County. It then listed: personal vehicle, bus, airplane, rental vehicle, and train. The respondents were to check all that applied. This information, again, was used to

describe the stay and to aide in determining the visitor profile.

Questions twelve through fourteen determined the visitors' knowledge of Genesee County and their source of knowledge. Question fifteen is another demographic question, and questions sixteen through twenty determined actual/potential expenditures in the County.

Question twelve (12) revealed the sources of information used to obtain information on Genesee County. Choices listed were: mailed request, magazine/brochure, information booth, Genesee County Travel Guide, friends/relatives, travel agent, automobile club, no sources used, other (please specify). The respondents were to check all that applied. This question was used to determine the knowledge of sources of the visitor and was used in determining the visitor profile. This question could also serve as an informational value to the respondents.

Question thirteen (13) identified which attractions/events in Genesee County that the respondents were aware of. Nineteen attractions/events were listed, and the twentieth choice was "other, please specify." The respondents were to check all that applied. This question made the County

aware of which events were known about and which should be advertised more. It also determined the knowledge of the respondents and aided in determining the visitor profile.

Question fourteen (14) determined which of those attractions/events from question thirteen did (or would) the respondent visit while in the County. The choices listed in this question are the same as in question thirteen, and the respondents were to check all that applied. This question was also used in determining the visitor profile.

Question fifteen (15) determined the respondents' annual household income. Choices range from "under \$20,000" to "over \$80,000." This question was used in determining the visitor profile.

Question sixteen (16) revealed the expense for accommodations per day in Genesee County that the respondents paid (or would pay) in U.S. dollars. The choices for response ranged from "less than \$15" to "more than \$76." This question aided in determining visitor expenses in the County for the visitor profile.

Question seventeen (17) identified the expense for food/meals per person, per day in U.S. dollars in Genesee County. The choices ranged from "less than \$5" to "more than \$25." This question also aided in determining visitor expenses in the County for the visitor profile.

Question eighteen (18) determined the expense for transportation per day in U.S. dollars Genesee County. This would include gas, tolls, etc. These choices also ranged from "less than \$5" to "more than \$25," but it includes "if on a tour, included in tour price." Again, this question aided in determining visitor expenses in the County for the visitor profile.

Question nineteen (19) revealed the expense for attractions and events per person, per day in U.S. dollars in Genesee County. This included entrance fees, charter fees, licensing fees, etc. The choices for response were the same as in question eighteen. This question also was used to aid in determining visitor expenses in Genesee County for the visitor profile.

Question twenty (20) determined the expense for personal items per person, per day in U.S. dollars in Genesee County.

This included souvenirs, sundries, recreation equipment, etc. Again, the choices for response were the same as questions eighteen and nineteen, and the question was used to aid in determining visitor expenses in the County for the visitor profile.

Questions twenty-one (21) and twenty-two (22) appeared only on the current and historical questionnaires. Question twenty-one (21) identified the rate of overall satisfaction with the respondents' stay in Genesee County. The ratings were on a scale of one to ten (1-10), one being the lowest possible score and ten being the highest. This question determined the rate of satisfaction for the visitor profile, and was also of valuable information to the County.

The last question, question twenty-two (22), revealed how many times the respondents had visited Genesee County. This question determined how many repeat visitors there were and indirectly determined the satisfaction of past stays. If the visitors were not satisfied with their first visit to the County, there would not be subsequent visits. Again, it was used in determining the visitor profile.

Results of the study were tabulated on SPSS-X, then displayed in Harvard Graphics and Word Perfect. The following chapter will explain the survey administration and the general outline and timing of the activity.

#### DEFINITION OF TERMS

**Dbase IV:** computer program which, in this case, stores all names and addresses to potential and historical visitors to Genesee County. This list is used to form labels for the various mailings of questionnaires.

**SPSS-X:** stands for the Statistical Package for the Social Sciences and is used for compiling and manipulating data, in this case it is all the data obtained from each market of questionnaires received.

**Crosstabulations:** process in SPSS-X which computes such things as: given the visitor was married, what percentage visited the

Genesee County Fairgrounds? In other words, it *crosstabulates* the dependent variable by the independent variable.

**Frequencies:** process in SPSS-X which computes the mean, mode, median, and variance of a variable.

**Harvard Graphics:** computer program used to produce graphics from data imputed, in this case, from the SPSS-X program.

**Word Perfect:** word processing program used to type reports and/or make tables.

## CHAPTER IV

### FINDINGS AND ANALYSIS

#### SURVEY ADMINISTRATION/GENERAL OUTLINE OF ACTIVITY

Upon completion of the questionnaire drafting, the cover letters were then created and printed on Genesee County Chamber of Commerce, Inc. letterhead. (Please see Appendix B to view each cover letter.) On July 27, 1990, the first mailing of the potential market was delivered. Each questionnaire was accompanied by a cover letter and a self addressed, stamped envelope. (Please see Appendix A to view the questionnaire and Appendix B to view the cover letter.) Once again, the names and addresses of those in the potential market supplied by the Genesee County Chamber of Commerce, Inc., were those people who have requested information in the past on the County. Approximately two weeks later on August 9, 1990, a second mailing was delivered to the same individuals with a follow-up cover letter. (See Appendix B to view the cover letter.)

The next two to three weeks were devoted to gathering historical registrations from the various hotels, campgrounds,

and bed and breakfasts. First, a letter of intent was sent to each merchant involved in the study, signed by the President of the Genesee County Chamber of Commerce, Inc., David L. Metzler. This letter was also printed on the Chamber's letterhead and was used to merely inform the merchants that there would be a representative conducting research that would need their assistance. (Please refer to Appendix C.) It was only after the letter of intent that the cooperation needed in obtaining the registrations was obtained. The registrations were entered into the same Dbase IV program as the potential market. Labels were then created for the mailing.

On August 31, 1990 the first historical mailing was delivered. The questionnaire was accompanied by a cover letter and a self-addressed, stamped envelope (Appendix A Questionnaire and Appendix B Cover Letter). At the same time, the current market questionnaires were delivered to each individual merchant. These questionnaires did not have a cover letter, as there was an explanation at the top of the questionnaire in lieu of a cover letter (Appendix A).

Two weeks later on September 15, 1990, the second mailing for the historical was delivered to the same individuals with a follow-up cover letter. At this time, those completed

questionnaires from the current market were picked up and more questionnaires were delivered. Approximately two weeks later in the first week of October, the remainder of the current market surveys was picked up.

During the month of September, the SPSS-X program was written and entered (Appendix D). When approximately one-third of the data had been entered, on September 28, 1990, a preliminary report was sent to the Genesee County Chamber of Commerce, Inc. This report consisted of only frequency tables on the data entered at that point. The remainder of the data was entered by the first week in November when there were no longer questionnaires being returned. New frequency tables and crosstabulations were then performed. The County's final report was submitted in early January of 1991.

In total, there were 3600 questionnaires distributed, 1200 in each of the historical, current, and potential markets. Returned were 729 questionnaires, a response rate of twenty percent.

## MARKET CHARACTERISTICS

This section will be broken into two parts. First is the Descriptive Statistics section, followed by the Market Spending section. A brief explanation of each section will be given at its commencement.

### PART I: DESCRIPTIVE STATISTICS (DEMOGRAPHICS)

This section includes demographic information on the visitors to Genesee County. It answers the following questions: what type of party travels to Genesee County; who travels to Genesee County; what do respondents say about their visit; how do visitors attain information on Genesee County; what attractions are visitors aware of and which do they participate in or visit; what is the household income of respondents; and what is the satisfaction level of the visitors' stay and how many times has the visitor been to Genesee County.

### What type of party travels to Genesee County?

Tables 2 and 3 address the issues of the type of party a visitor to Genesee County travels with and the number in that party, respectively. For these analyses, frequency tables were performed in SPSS-X.

Table 2 indicates that the type of party most frequently traveled with to Genesee County was overwhelmingly the immediate family at 62.2 percent. The second most frequent type of party was a group of friends at 19.5 percent. This was followed by those traveling alone, 7.7 percent; those traveling with a group of relatives, 5.2 percent; those traveling with business associates, 3.3 percent; and those visitors traveling as a member of a tour, 2.1 percent.

Table 3 shows that the number in party most frequently traveled with was two people, at 24.5 percent. While 21.8 percent of the respondents reported four people in their party, not far behind was six or more, at 20.9 percent. This was followed by three at 12.6 percent, five at 12.3 percent, and one at 7.2 percent.

TYPE OF VISITOR

Table 2

	Frequency	Percentage
Immediate Family	450	62.2
Group of Friends	141	19.5
Group of Relatives	38	5.2
Member of a Tour	15	2.1
Business Associates	24	3.3
Traveling Alone	56	7.7

NUMBER IN PARTY

Table 3

	Frequency	Percentage
One	56	7.2
Two	173	24.5
Three	89	12.6
Four	154	21.8
Five	87	12.3
Six or more	148	20.9

### Who travels to Genesee County?

Tables 4, 5, and 6 describe the visitors to Genesee County in terms of their marital status, the number of children they have and their occupation. Again, frequency tables were performed for this analysis.

Table 4 indicates that the majority of the respondents, 68.3 percent, were married. The next highest category was single people at 19.9 percent. This was followed by divorced, 7.2 percent; separated, 2.6 percent; and widowed, 1.8 percent.

Table 5 shows that 28.6 percent of the visitors to Genesee County had no children and 25.3 percent of the respondents had two children. This was followed by 18.2 percent with three children; 12.2 percent with one; 9.2 percent with four; 3.3 percent with more than five; and 3.2 percent with five children.

Table 6 displays the most popular type of occupation of the visitors to Genesee County to be professional, at 20.7 percent. Manager/administrator came in second at 13.2 percent. Self employed was the third most frequent response at

MARITAL STATUS OF VISITOR

Table 4

	Frequency	Percentage
Single	143	19.9
Divorced	52	7.2
Separated	19	2.6
Widowed	13	1.8
Married	492	68.3

NUMBER OF CHILDREN

Table 5

	Frequency	Percentage
None	206	28.6
One	88	12.2
Two	182	25.3
Three	131	18.2
Four	66	9.2
Five	23	3.2
More than Five	24	3.3

OCCUPATION OF VISITOR

Table 6

	Frequency	Percentage
Professional	149	20.7
Manager/Administrator	95	13.2
Lawyer	13	1.8
Medical	17	2.4
Engineering	19	2.6
Agriculture	8	1.1
Manufacturing	29	4.0
Transportation	29	4.0
Retail/Sales	41	5.7
Craftsman	15	2.1
Self Employed	59	8.2
Government	37	5.1
Clerical	52	7.2
Student	38	5.1
Retired	58	8.0
Not Employed	16	2.2
Other	46	6.4

8.2 percent. This was followed by retired at eight percent, clerical at 7.2 percent, "other" at 6.4 percent, retail/sales at 5.7 percent, government and student tied at 5.1 percent, manufacturing and transportation tied at four percent, engineering at 2.6 percent, medical at 2.4 percent, not employed at 2.2 percent, craftsman at 2.1 percent, lawyer at 1.8 percent, and agriculture at 1.1 percent.

What do respondents say about their visit to Genesee County?

Tables 7, 8, 9, and 10 discuss the purpose of their visit, the length of their visit, the accommodations used during their visit, and the transportation means used to get to Genesee County. Once again, frequency tables were used for analysis.

Table 7 demonstrates that the primary purpose for visitors to travel to Genesee County was for a vacation, 66.3 percent. The next most frequent response was for "other" reasons, 9.6 percent. This was followed by a specific event at 9.2 percent, business at eight percent, and visit friends/relatives at 6.8 percent.

PURPOSE OF VISIT

Table 7

	Frequency	Percentage
Business	58	8.0
Visit Friends/Relatives	49	6.8
Vacation	478	66.3
Specific Event	66	9.2
Other	69	9.6

Table 8 indicates that the most frequent length of stay in Genesee County was one to three days, at 41.9 percent. Four to five days was the next most frequent at 27.8 days. This was succeeded by less than one day at 17.3 percent, six to seven days at 7.5 percent, and more than one week at 5.7 percent.

Table 9 exhibits the most popular accommodation in Genesee County to be campgrounds at 41.2 percent. Hotels/motels were not far behind at 36.5 percent. Next were those not staying in Genesee County at 12.6 percent, those staying with family or friends at 5.4 percent and those staying in a bed and breakfast at 4.2 percent.

Table 10 reveals the most frequent means of transportation used to get to Genesee County was overwhelmingly the personal vehicle at 92.6 percent. This was followed by the rental vehicle at 4.4 percent, a motor coach at three percent, an airplane at 2.6 percent, and a train at .7 percent.

LENGTH OF VISIT

Table 8

	Frequency	Percentage
Less than 1 Day	125	17.3
1 to 3 Days	303	41.9
4 to 5 Days	201	27.8
6 to 7 Days	54	7.5
More than 1 Week	41	5.7

ACCOMMODATIONS WHILE IN GENESEE COUNTY

Table 9

	Frequency	Percentage
Campgrounds	291	41.2
Bed & Breakfast	30	4.2
Hotel/Motel	258	36.5
Family or Friends	38	5.4
Not Staying in Genesee County	89	12.6

TRANSPORTATION MEANS

Table 10

	Frequency	Percentage
Personal Vehicle	673	92.6
Motor Coach	22	3.0
Airplane	19	2.6
Rental Vehicle	32	4.4
Train	5	.7

### How Do Visitors Obtain Information On Genesee County?

The importance of marketing in attracting tourists to Genesee County is illustrated in Table 11 and Exhibits 1, 2, and 3. Table 11 utilized frequency analysis, while Exhibits 1, 2, and 3 utilized crosstabulation analysis.

Table 11 indicates a mailed request as the primary source of information used to obtain information on Genesee County at 41.3 percent. A magazine/brochure was used by 21.3 percent of the respondents, and 19.7 percent found out information through their friends or relatives. 15.1 percent of the respondents report no sources used at all, which could suggest word of mouth or those respondents were merely stopping over in the county on their way somewhere else. The Genesee County Travel Guide was used by 14.2 percent of the visitors, "other" sources were used by 11.7 percent, an automobile club by 8.7 percent, the information booth by 6.1 percent, and a travel agent was used by 2.5 percent.

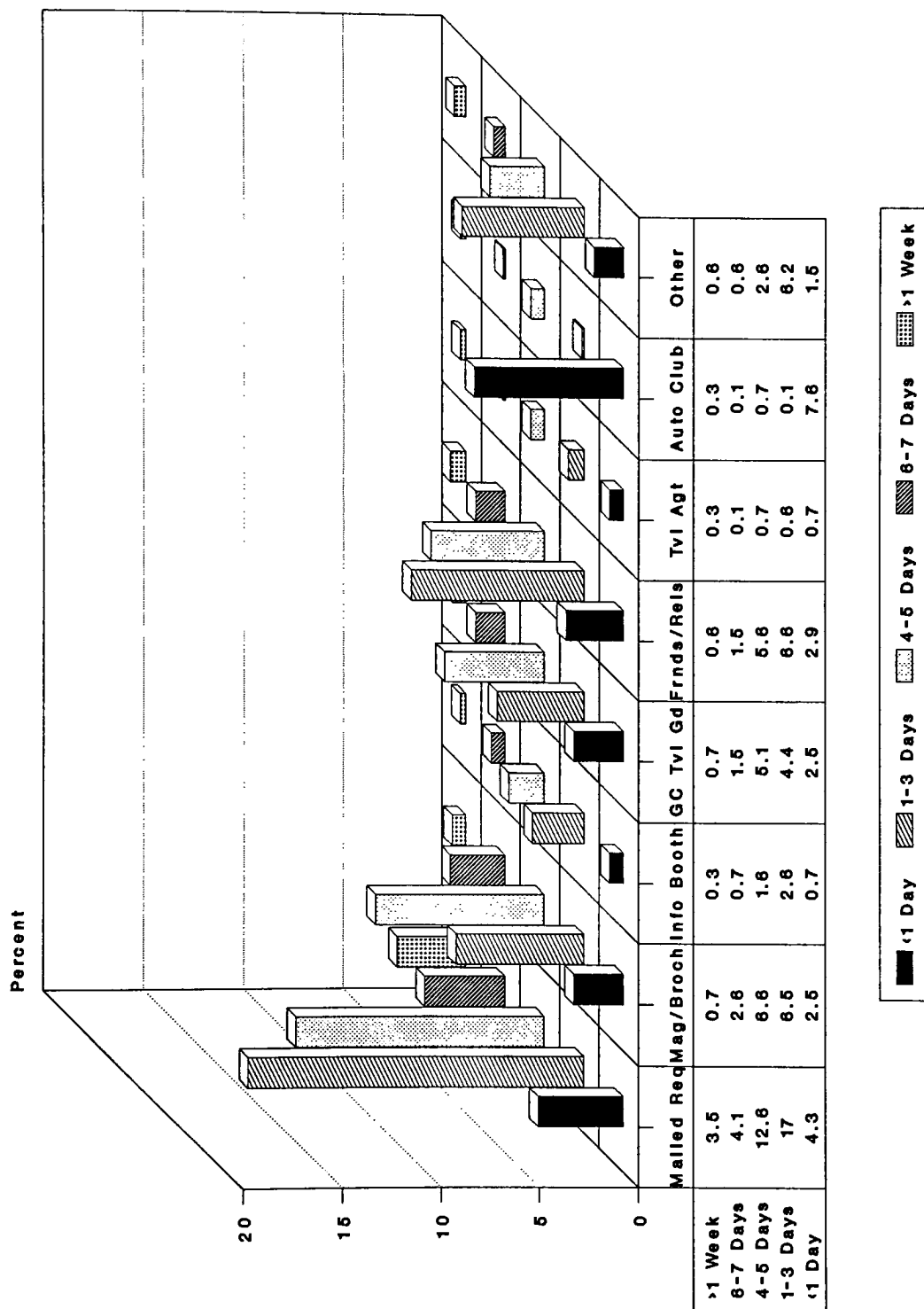
Exhibit 1 shows the results of the crosstabulation between the source of information and the length of stay. Overwhelmingly, a mailed request was the most utilized source of information for visitors to Genesee County. The greatest

SOURCES OF INFORMATION USED TO OBTAIN INFORMATION  
ON GENESEE COUNTY

Table 11

	Frequency	Percentage
Mailed Request	301	41.3
Magazine/Brochure	155	21.3
Information Booth	44	6.1
Genesee County Travel Guide	103	14.2
Friends or Relatives	143	19.7
Travel Agent	18	2.5
Automobile Club	63	8.7
Other	85	11.7
No Sources Used	110	15.1

# LENGTH OF STAY BY SOURCE OF INFORMATION Exhibit 1



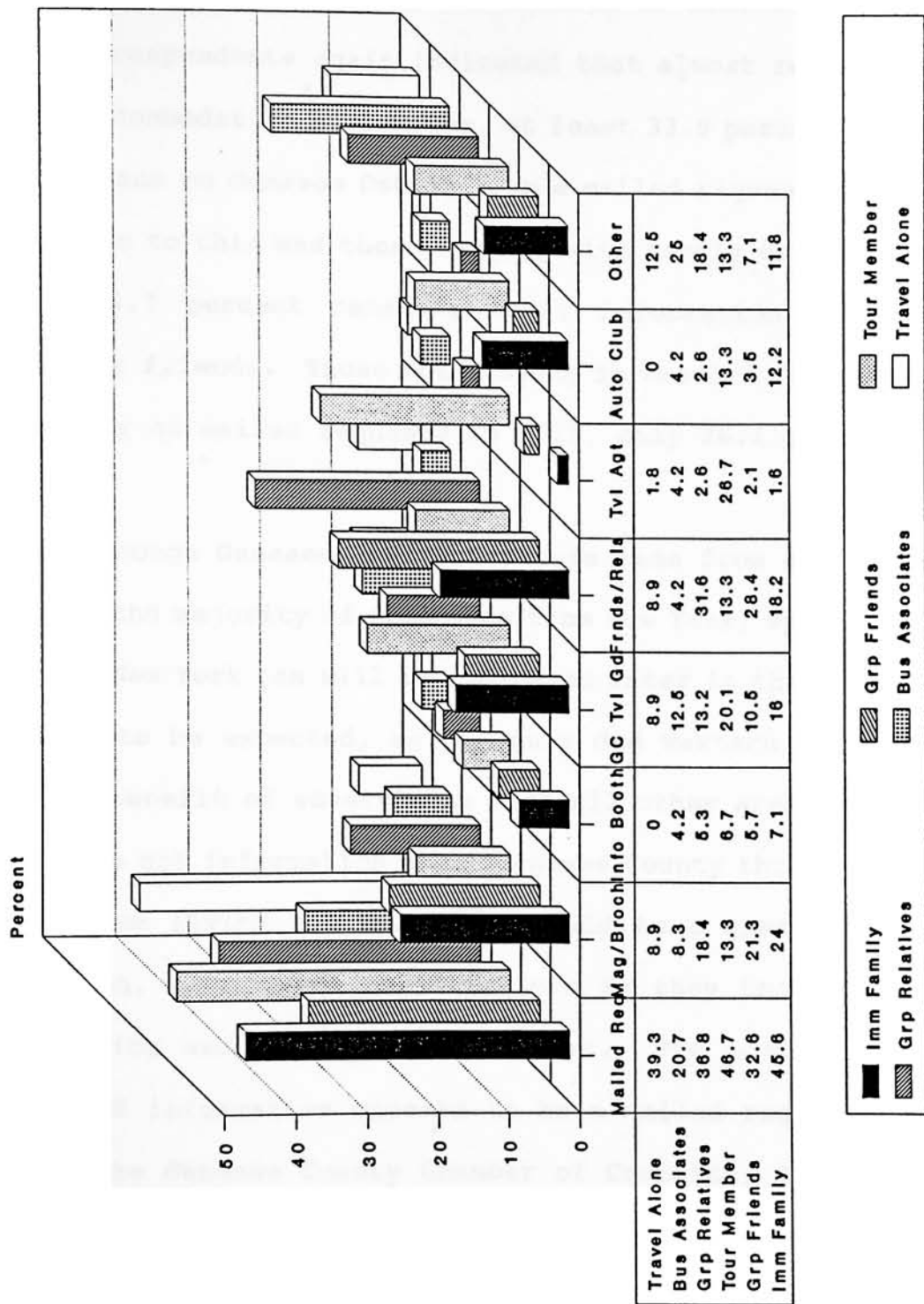
Genesee County Survey

users of this information (almost 30 percent) tended to stay between 1 and 6 days. The second most used source of information were magazines/brochures and friends/relatives. Again the 1 to 6 day length of stay typified this visitor. Those staying less than one day were more likely to use the auto club (7.8 percent) as a source of information.

Exhibit 2 illustrates the results of the crosstabulation between the source of information and the type of party (market segment) that traveled to Genesee County. The extent to which mailed requests were utilized becomes more apparent; 45.6 percent of those traveling with their immediate family, 32.6 percent of those traveling with a group of friends, 46.7 percent of those traveling on a tour, 36.8 percent of those traveling with a group of relatives and 39.3 percent of those traveling alone, all report a mailed request as their primary source of information. As would be expected, those who traveled with business associates, twenty-five percent said that they neither requested nor received any information about Genesee County. Those traveling with groups of friends (21.3 percent) or groups of relatives (13.4 percent) also received information from magazines or brochures as well as from friends or relatives who live in Genesee County (23.8 percent and 31.8 percent respectively).

# TYPE OF PARTY BY SOURCE OF INFORMATION

## Exhibit 2

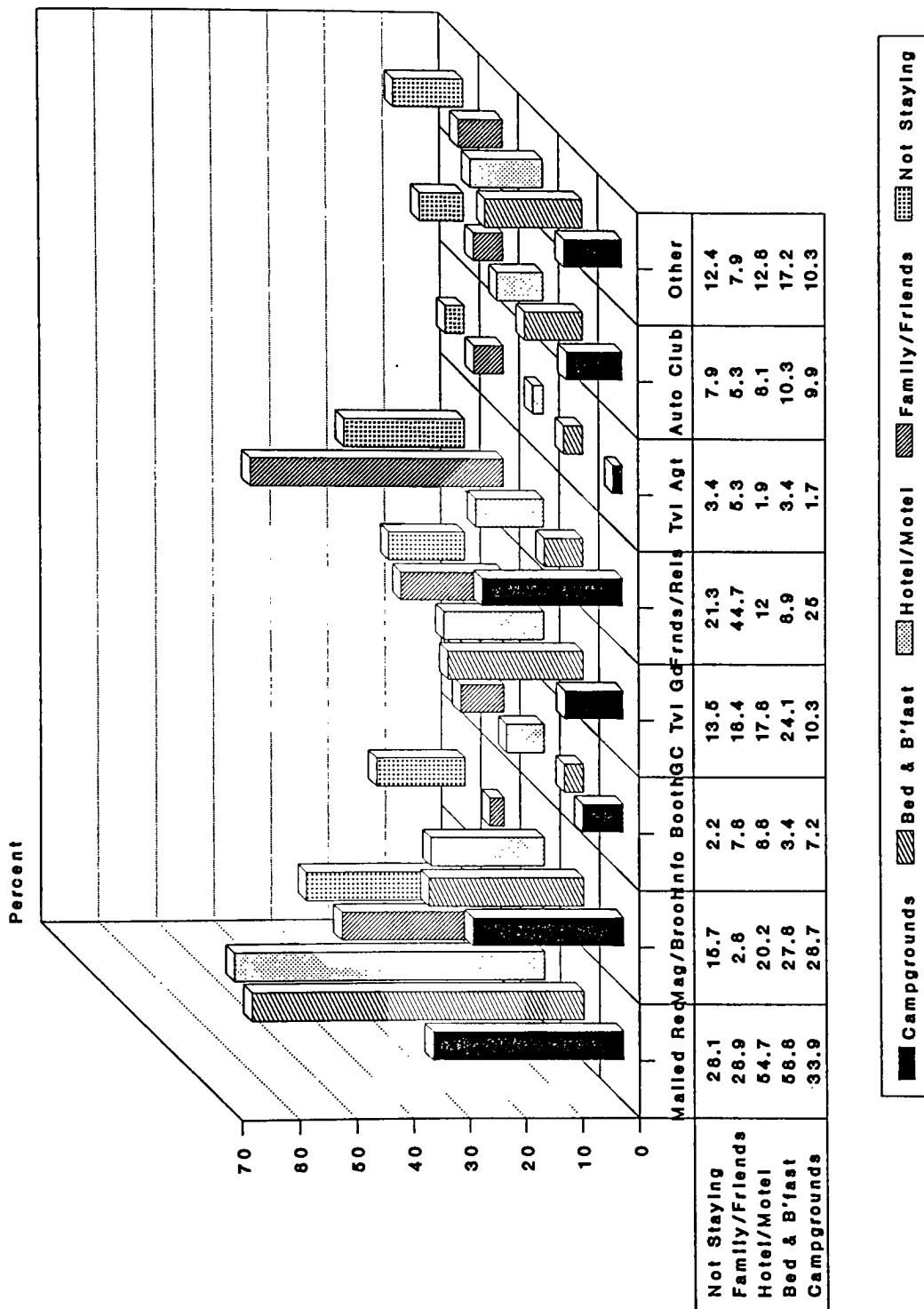


Genesee County Survey

The crosstabulation of source of information and type of accommodations utilized by the visitor is defined in Exhibit 3. The respondents again indicated that almost regardless of their accommodation preference, at least 33.9 percent received information on Genesee County from a mailed request. The only exception to this was those staying with family or friends, in which 44.7 percent received their information from their family or friends. Those not staying in Genesee County relied primarily on mailed requests as well, only 28.1 percent.

Although Genesee County visitors came from a variety of places, the majority of them came from New York, specifically, Western New York (as will be indicated later in this chapter). This is to be expected, as not only did Western New Yorkers get the benefit of advertising that all other areas have, but they also got information about Genesee County through word of mouth from living nearby. This would be a great market to expand on, along with Ohio visitors as they too had strong advertising and were a secure market. The most successful source of information appears to be a mailed request. This proves the Genesee County Chamber of Commerce, Inc. did its job quite well in promoting the County. Also of great importance is the advertising in magazines and brochures. Many of those who received information from this source later

# ACCOMMODATIONS BY SOURCE OF INFORMATION Exhibit 3



Genesee County Survey

mailed in the form from the magazine to get further information, hence they used this source in conjunction with the mailed request. Of those sources not very successful were the information booth and the auto club for those visitors who simply stopped over in Genesee County.

#### What Attractions Are Visitors Aware Of?

#### What Attraction Do Visitors Participate In Or Visit?

Tables 12 and 13 and Exhibits 4 through 9 address the issue of which attractions visitors were aware in Genesee County and which attractions they actually participated in or visited. For these analyses, frequency tables and crosstabulations of awareness of and visited were performed with the type of party (market segment). Exhibit 10 crosstabulates the awareness of and visited attractions with the total visitors, giving the percentage of total visitors who actually participated or visited in those attractions they were aware of.

Table 12 displays which attractions in Genesee County the respondents were aware of. Darien Lake Theme Park and Camping Resort was recognized by 72.5 percent, making it the best

AWARENESS OF SELECTED ATTRACTIONS IN GENESEE COUNTY

Table 12

	Frequency	Percentage
Darien Lake (Park & Camping)	527	72.5
Farmer's Market	96	13.2
Camping Facilities	269	36.9
Genesee County Mall	145	19.9
Golf Facilities	81	11.1
Historic Locations	187	25.7
Harness Racing	150	20.6
Factory Outlets	242	33.3
Primeval Bergen Swamp Trails	58	8.0
Museums	182	25.0
Genesee County Fairgrounds	102	14.0
Genesee County Park	69	9.5
Genesee Symphony	27	3.5
Cross Country Skiing	47	6.4
Snowmobile Trails	34	4.7
Hunting	67	9.2
Fishing	113	15.5
Professional Baseball	68	9.3
Antique Shops	70	9.6
Other	27	3.7

known attraction of Genesee County. As to be expected, camping facilities came in second at 36.9 percent awareness. Factory outlets were known by 33.3 percent of the respondents, and historic locations were known by 25.7 percent. Twenty-five percent of the respondents were aware of the museums in Genesee County, 20.6 percent were aware of harness racing, 19.9 percent were aware of the Genesee County Mall, and 15.5 percent were aware of fishing in the County. Fourteen percent of the respondents knew about the Genesee County Fairgrounds, 13.2 percent about the farmer's market, and 11.1 percent about golf facilities. The remaining attractions were not well known. They were antique shops, the Genesee County Park, professional baseball, hunting, the Primeval Bergen Swamp Trails, cross country skiing, snowmobile trails, "other" attractions, and the Genesee Symphony. Their percent of awareness respectively was: 9.6, 9.5, 9.3, 9.2, 8.0, 6.4, 4.7, 3.7, and 3.5 percent.

Table 13 describes those attractions the respondents have visited or would visit. Darien Lake Theme Park and Camping Resort has the highest percentage of visitors at 60.9 percent, followed by the factory outlets at 37.2 percent. Historic locations were visited by 29.5 of the respondents, while 24.8 percent visited camping facilities and/or museums. The

ATTRACTIONS VISITED IN GENESEE COUNTY

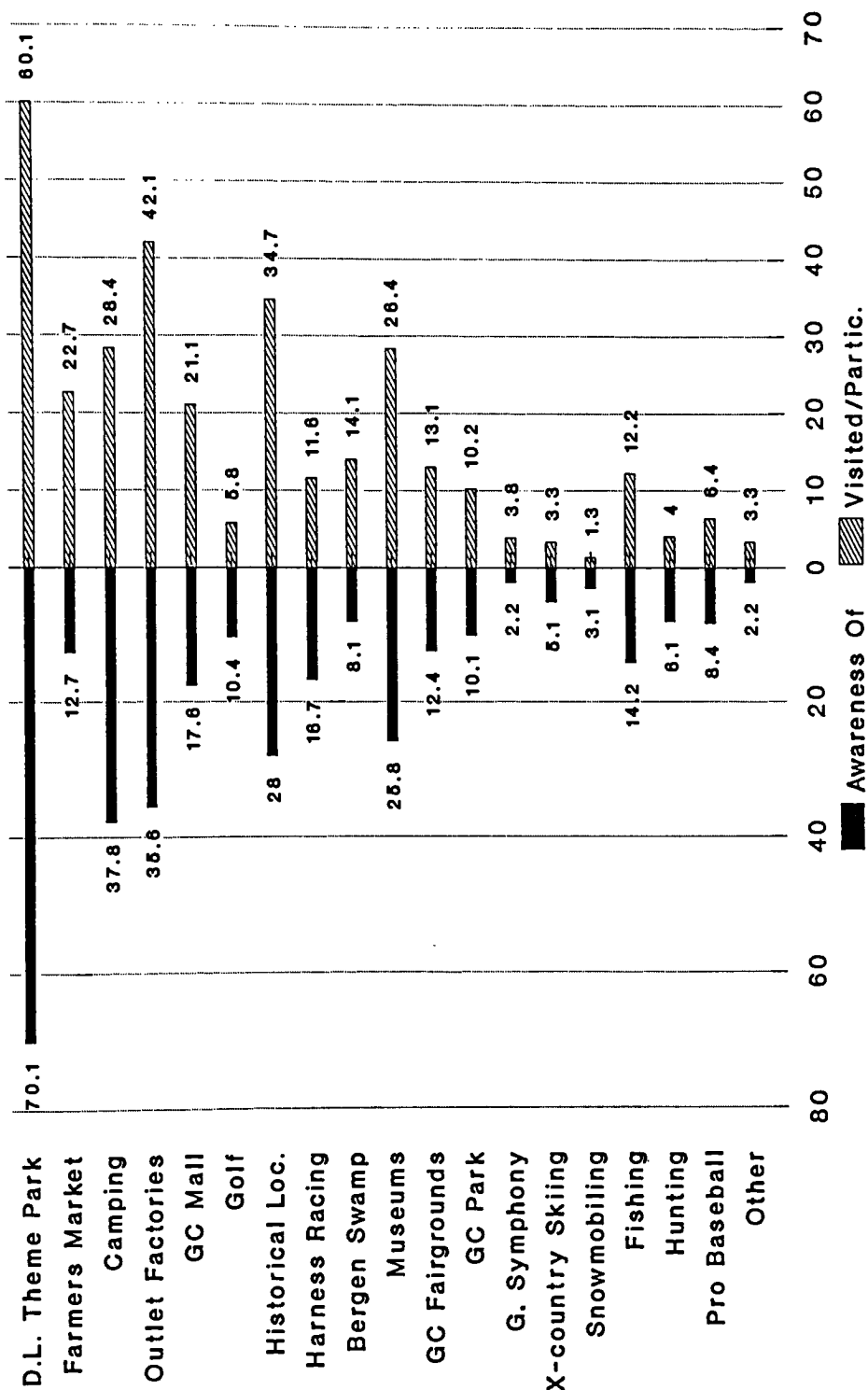
Table 13

	Frequency	Percentage
Darien Lake (Park & Camping)	444	60.9
Farmer's Market	149	20.4
Camping Facilities	181	24.8
Genesee County Mall	148	20.3
Golf Facilities	40	5.5
Historic Locations	215	29.5
Harness Racing	88	12.1
Factory Outlets	271	37.2
Primeval Bergen Swamp Trails	86	11.8
Museums	181	24.8
Genesee County Fairgrounds	103	14.1
Genesee County Park	73	10.0
Genesee Symphony	31	4.3
Cross Country Skiing	27	3.7
Snowmobile Trails	8	1.1
Hunting	32	4.4
Fishing	80	11.0
Professional Baseball	53	7.3
Other	24	3.3

farmer's market was visited by 20.4 percent, the Genesee County Mall by 20.3 percent, the Genesee Fairgrounds by 14.1 percent, harness racing by 12.1 percent, and the Primeval Bergen Swamp Trails by 11.8 percent of the respondents. Eleven percent of the respondents engaged in fishing and ten percent visit the Genesee County Park. The remaining attractions were not heavily visited or participated in. These included: professional baseball, golf facilities, hunting, the Genesee Symphony, cross country skiing, "other" attractions, and snowmobile trails. Their percentage visited respectively are: 7.3, 5.5, 4.4, 4.3, 3.7, 3.3, and 1.1 percent.

Exhibit 4 shows that 70.1 percent of those who traveled with their immediate family responded they were aware of Darien Lake Theme Park and Camping Resort, and 60.1 percent actually visited the park during their visit. This table also indicated that 37.8 percent of groups of immediate families were aware of camping and 28.4 percent actually did go camping. Additionally, 35.6 percent of this same type of party were aware of the outlet factories in Genesee County, while 42.1 percent, a larger number than originally were aware of the outlet factories, went shopping. It appears that many of these campers took day trips into Genesee County visiting

# AWARENESS OF vs. VISITED ATTRACTIONS Immediate Family Market Segment Exhibit 4

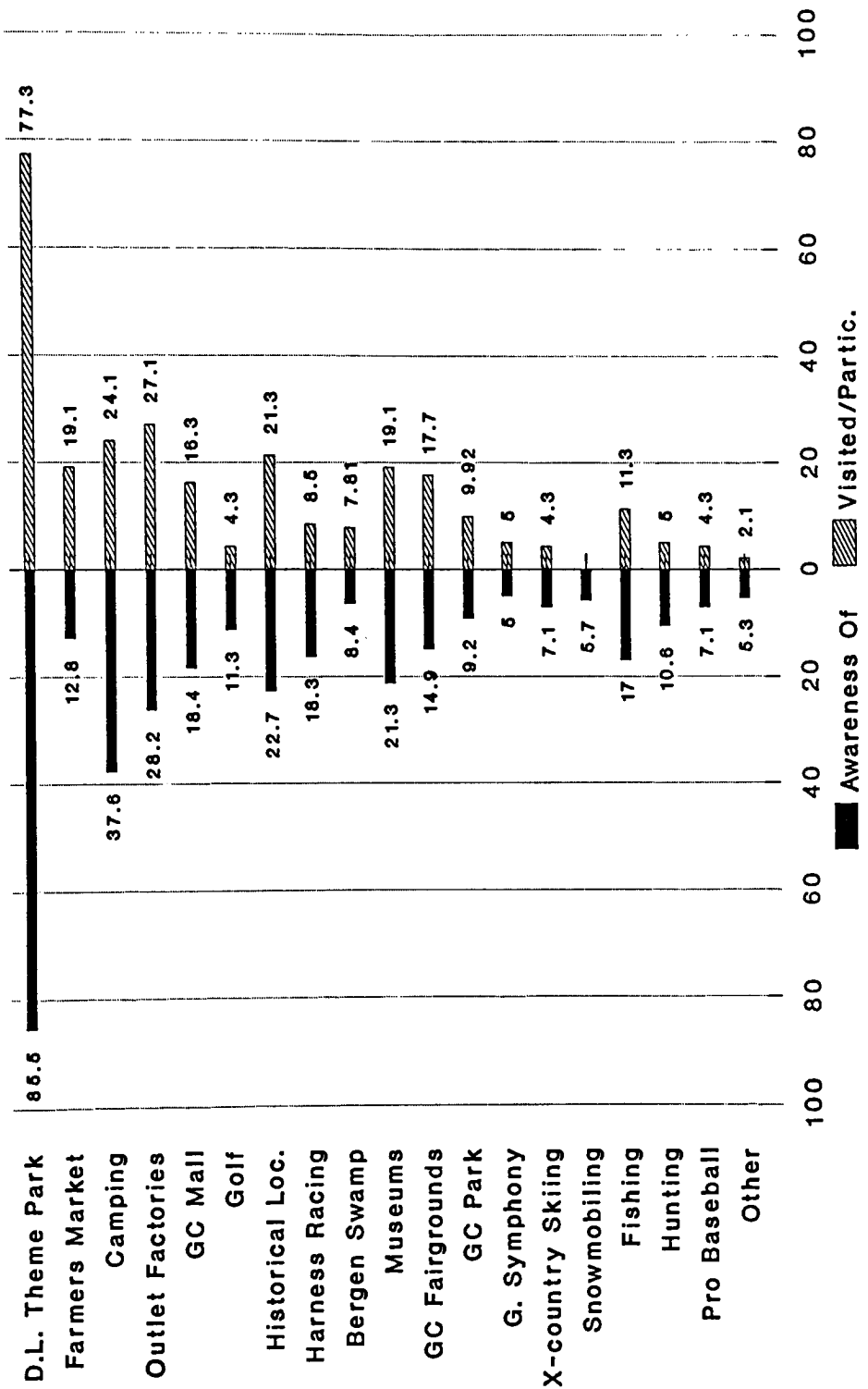


historic locations, museums, the Genesee County Mall, Bergen Swamp and the Genesee County Fairgrounds.

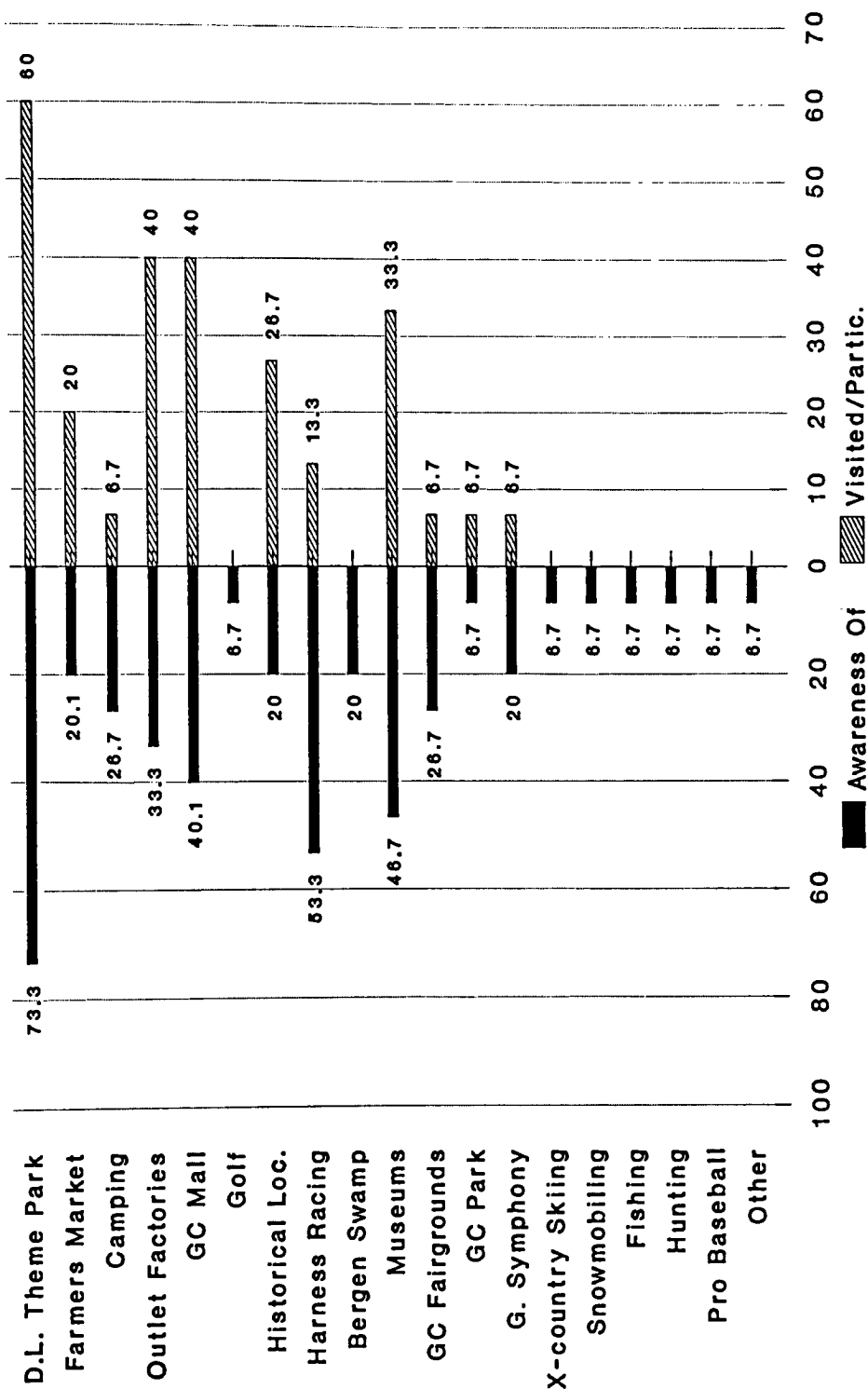
Exhibit 5 illustrates that 85.8 percent of groups of friends who responded were aware of Darien Lake Theme Park and Camping Resort, and 77.3 percent actually visited the park during their visit. Also, 37.6 percent of the same group were aware of camping activities in the County while only 24.1 percent participated in camping. By examining the difference between the percentage of awareness to the percentage visited, the group of friends tended to visit those attractions/events that were periodic and/or more characteristic of the touristic resources of Genesee County. The group of friends tended to visit the farmer's market, Genesee County Fairgrounds, factory outlets, Bergen Swamp, and Genesee County Park.

Exhibit 6 outlines again that 73.3 percent of the tour members who responded were aware of Darien Lake Theme Park and Camping Resort with only sixty percent who actually visited the park while in Genesee County. Also, 53.3 percent of the tour members were aware of the harness racing in the County, while only 13.3 percent actually had the opportunity to go to the races. Tour members tended to visit those attractions/events that typically were used in prearranged "package

# **AWARENESS OF vs. VISITED ATTRACTIONS** **Group of Friends Market Segment** **Exhibit 5**



# AWARENESS OF vs. VISITED ATTRACTIONS Tour Member Market Segment Exhibit 6

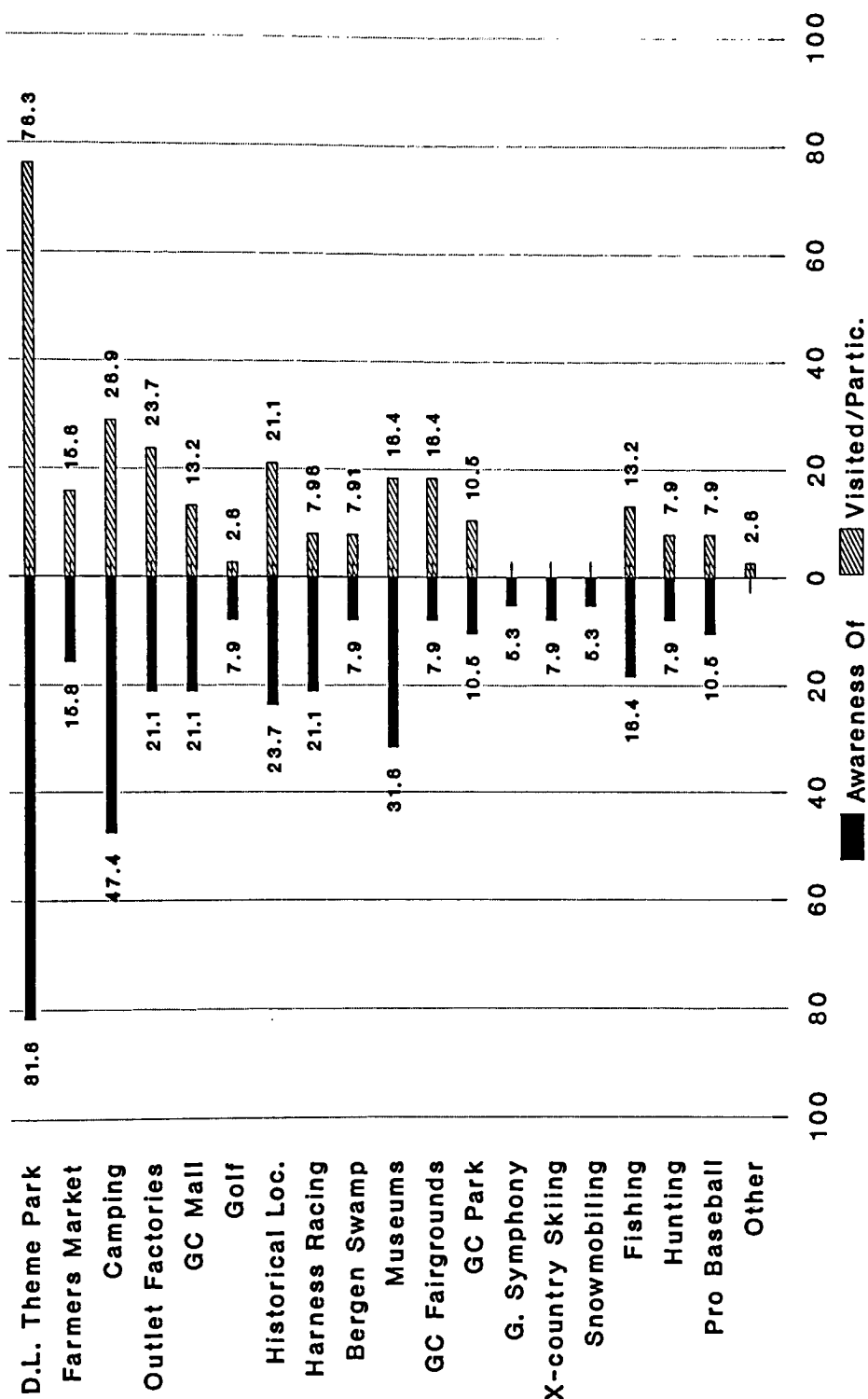


tours". Hence, the factory outlet, Genesee County Mall, museums, historic locations, and farmer's market all demonstrated strong visitation patterns. On the other hand, as might be expected, any attraction/event that was outdoors or recreational in nature (eg., golf, fishing, etc.) held little to no interest for this group of visitors.

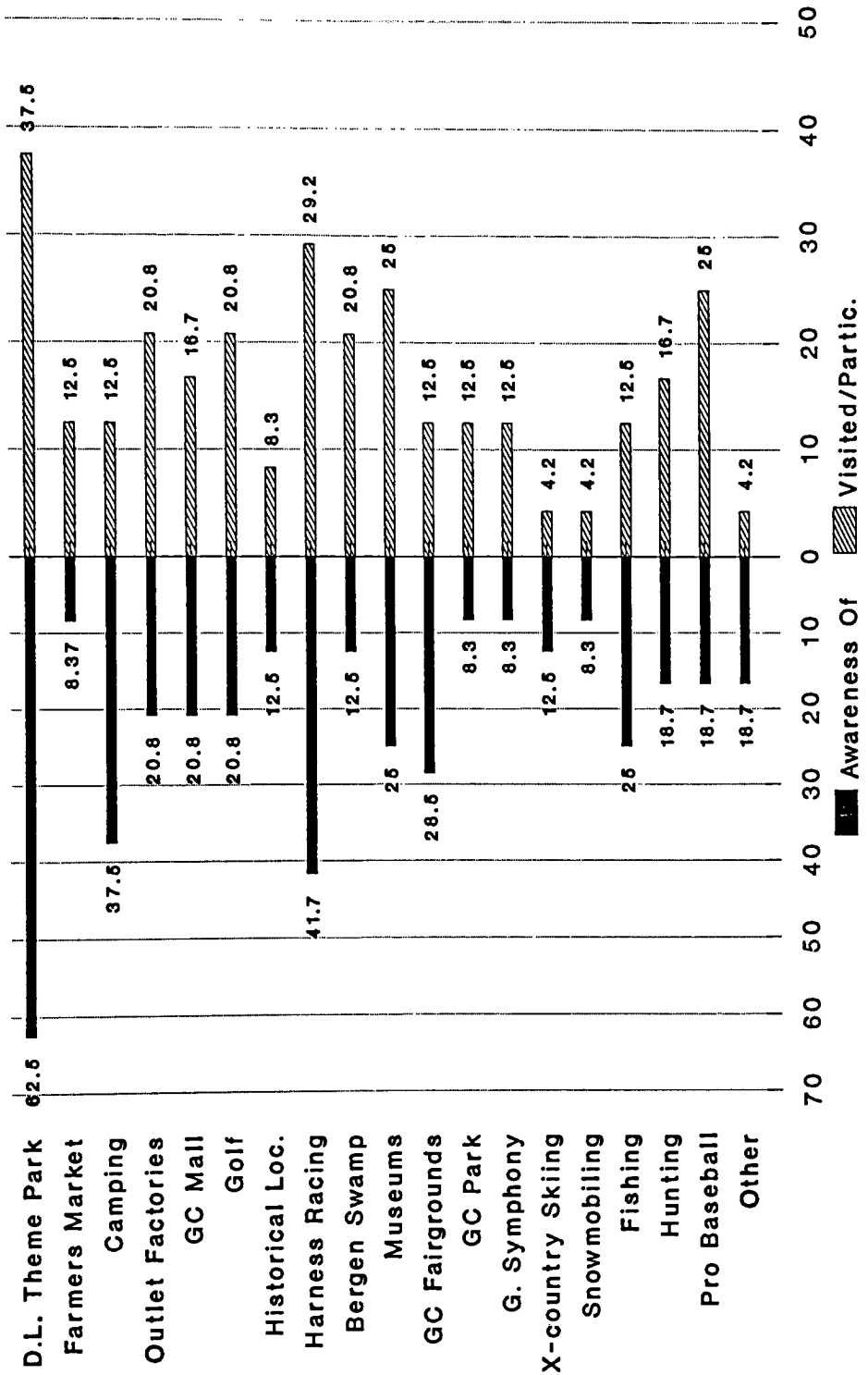
Exhibit 7 demonstrates that 81.6 percent of groups of relatives who responded were aware of Darien Lake Theme Park and Camping Resort with only 76.3 percent who actually went to see the park. Additionally, 47.4 percent of groups of relatives were aware of camping in Genesee County, of which 28.9 percent did camp; 31.6 percent of the same group were aware of museums with only 18.4 percent who actually visited them. This group of visitors tended to stay at Darien Lake Theme Park and Camping Resort. Outside visits were limited to the factory outlets and the Genesee County Fairgrounds.

Exhibit 8 illustrates that 62.5 percent of those visitors traveling with business associates to Genesee County were aware of Darien Lake Theme Park and Camping Resort, with 37.5 percent who actually went during their stay. In addition, 41.7 percent were aware of harness racing, and only 29.2 percent visited the races. In addition to harness racing,

# AWARENESS OF vs. VISITED ATTRACTIONS Group of Relatives Market Segment Exhibit 7



# AWARENESS OF vs. VISITED ATTRACTIONS Business Associates Market Segment Exhibit 8

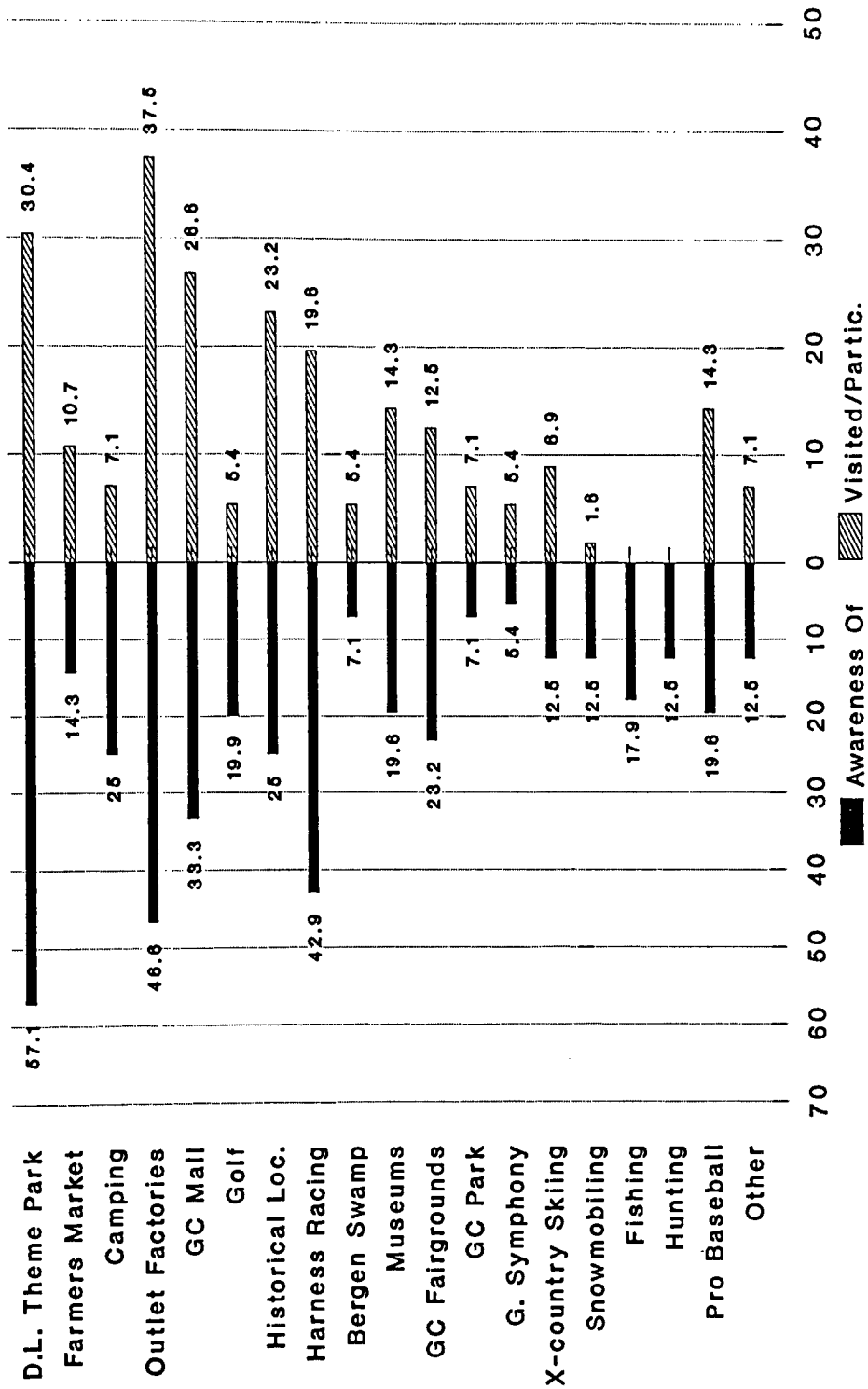


business associates tended to take in a baseball game (25 percent) or play golf (20.8 percent.) This was a more diversified group, interested in a wide spectrum of attractions/events in Genesee County. It appears that they were more willing to explore the touristic resources of Genesee County than any other visitor group.

Exhibit 9 interestingly shows that 57.1 percent of those who traveled alone were aware of Darien Lake Theme Park and Camping Resort, and not surprisingly only 30.4 percent visited the park. Single travelers also were aware of outlet factories, harness racing, and the Genesee County Mall, which attracted 37.5 percent, 19.6 percent, and 26.8 percent respectively. Their pattern was more characteristic of those traveling with group of friends. They were not overtly adventurous, although they were aware of much more of the touristic resources in Genesee County.

Although each of the above groups represents a different market segment, three groups (immediate family, group of friends and group of relatives) tended to utilize the attractions/events of Genesee County quite similarly. They visited Darien Lake Theme Park and Camping Resort, and perhaps visited shopping facilities and/or historic locales. The

# AWARENESS OF vs. VISITED ATTRACTIONS Travel Alone Market Segment Exhibit 9



business associate market segment was better acquainted with Genesee County and took part in more diverse activities. Those traveling alone tended to be conservative, visiting only main-line attractions/events. Tour members, as expected, were somewhat channeled by the very structure of the tour itself, and hence made an impact on those attractions/events used within the tour package.

The final table on awareness/visitation is Table 14. This table outlines what percentage of total visitors actually participated in or visited those attractions which they indicated they were aware of in Genesee County. The highest percentage was Darien Lake Theme Park and Camping Resort where fifty-nine percent of visitors that were aware of the park actually visited it. Outlet factories and camping were also quite high with twenty-five percent and twenty-two percent respectively of visitors aware actually visited the attraction. Eighteen percent of visitors aware of historical locations in the County indicate that they do visit during their stay and fourteen percent of visitors who responded that they are aware of museums in the County actually do visit the museums.

TOTAL AWARE/TOTAL VISITED

Table 14

<u>ATTRACTIONS:</u>	<u>PERCENTAGE:</u>
Darien Lake Theme Park	58.6
Farmer's Market	9.9
Camping	21.7
Outlet Factories	25.0
GC Mall	11.4
Golf	4.0
Historical Locations	17.9
Harness Racing	8.1
Bergen Swamp	3.9
Museums	14.4
GC Fairgrounds	6.6
GC Park	4.5
G Symphony	1.5
Skiing	2.1
Snowmobiling	0.8
Fishing	6.5
Hunting	2.9
Pro Baseball	3.6
Other	1.4

### What is the Household Income Of Visitors To Genesee County?

The analysis of annual household income is displayed in Table 15 and Exhibit 10, using frequency and crosstabulation analysis.

Table 15 indicates the highest percentage of respondents, 21.1 percent, had an annual household income of \$30,001 to \$40,000. Not far behind were those who made between \$20,001 and \$30,000 at 19.4 percent. Fifteen percent of the respondents reported earnings between \$40,001 and \$50,000. This was followed by 14.2 percent who earned less than \$20,000, 13.3 percent who earned \$50,001 to \$60,000, 7.5 percent who earned more than \$80,000, and 5.6 percent who earned \$60,001 to \$70,000. The least amount of respondents, four percent, earned \$70,000 to \$80,000.

Types of party (market segments) visiting Genesee County were crosstabulated with the annual household income of respondents in Exhibit 10. This table provides the information to compile an average income for each type of visiting party, which used grouped data (by market segment) means. The average income for those who traveled with a group of friends was \$34,500. Those traveling on a tour and those

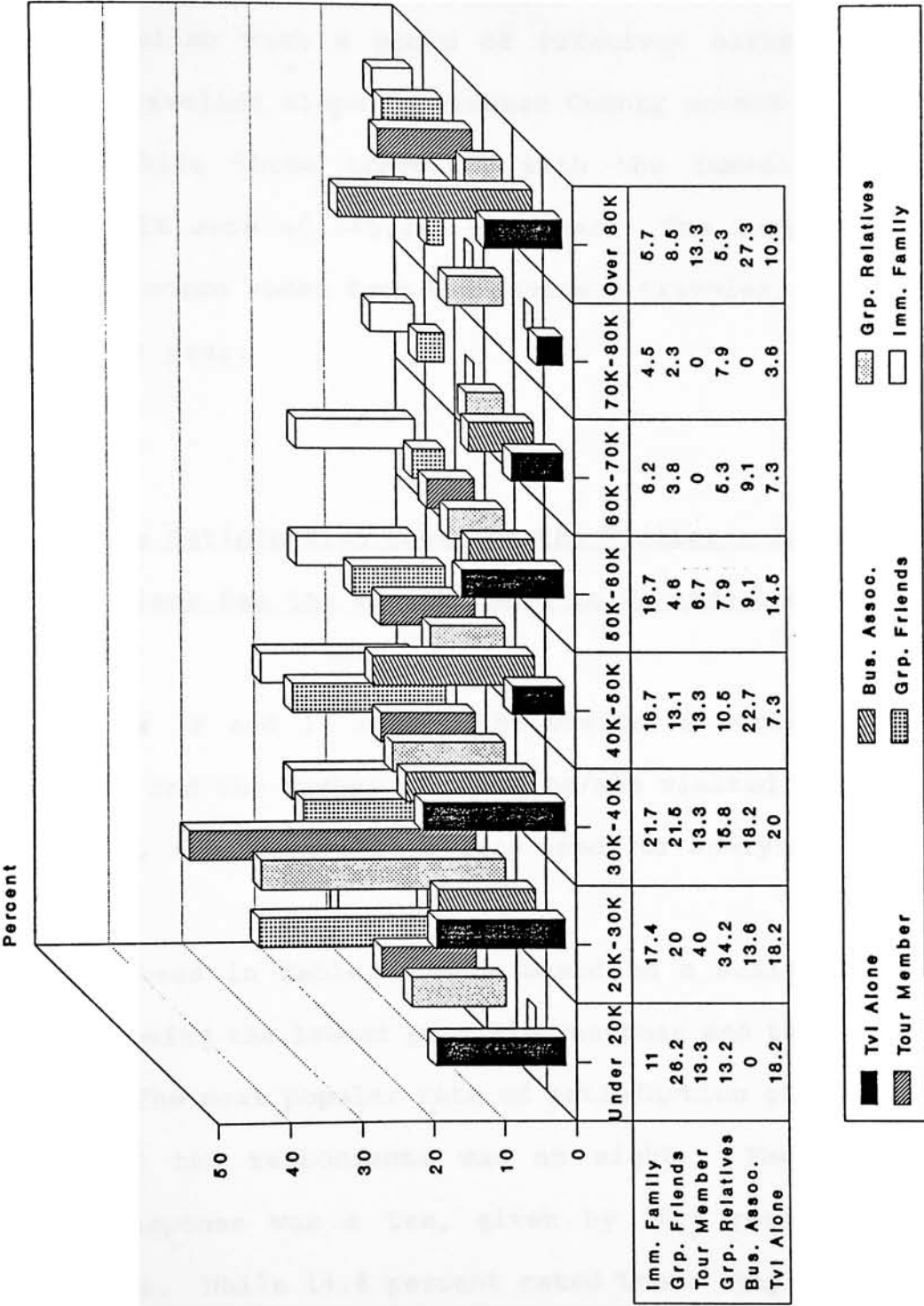
ANNUAL HOUSEHOLD INCOME OF RESPONDENTS

Table 15

	Frequency	Percentage
Under \$20,000	97	14.2
\$20,001 to \$30,000	132	19.4
\$30,001 to \$40,000	144	21.1
\$40,001 to \$50,000	102	15.0
\$50,001 to \$60,000	91	13.3
\$60,001 to \$70,000	38	5.6
\$70,001 to 80,000	27	4.0
Over \$80,000	51	7.5

# HOUSEHOLD INCOME BY MARKET SEGMENT

## Exhibit 10



traveling with a group of relatives had similar household incomes. Tour members made on average \$38,060 per year, while those traveling with a group of relatives earned \$38,345. Visitors traveling alone to Genesee County earned on average \$41,490, while those traveling with the immediate family earned a bit more at \$45,295 per year. The largest annual household income comes from the business traveler, who earned \$54,160 per year.

What is the Satisfaction Level of the Visitor's Stay?

How Many Times Has the Visitor Been to Genesee County?

Tables 16 and 17 report the visitor's satisfaction of their stay and the number of times he/she visited the County. Once again, frequency tables were used for analysis.

Responses in Table 16 were based on a scale of one to ten; one being the lowest possible response and ten being the highest. The most popular rate of satisfaction given by 37.2 percent of the respondents was an eight. The next most popular response was a ten, given by 18.6 percent of the respondents. While 14.8 percent rated their stay as a seven, 12.5 rated it as a nine. Only 7.3 percent rated their stay

SATISFACTION WITH STAY IN GENESEE COUNTY  
(1 = lowest, 10 = highest)

Table 16

	Frequency	Percentage
1	3	.9
2	---	---
3	8	2.3
4	5	1.5
5	25	7.3
6	17	4.9
7	51	14.8
8	128	37.2
9	43	12.5
10	64	18.6

a five, 4.9 percent a six, 2.3 percent a three, 1.5 percent a four, and .9 percent a one. There were no responses of a two on a scale of one to ten.

Table 17 reports that most respondents who had visited Genesee County had visited more than five times (38.4 percent.) This is understandable, since their stays were highly rated and were on average an eight on a scale of one to ten. The second most frequent number of visits was only one (22.8 percent), but these people have a high chance of coming back with the high rate of satisfaction reported. While 14.3 percent reported three visits, 8.8 percent reported two visits. Four and five visits were tied at 7.9 percent.

In summary, the typical visitor to Genesee County traveled on vacation for one to three days with his or her immediate family in a group of two. The typical visitor was married but had no children. His/her occupation was described as professional and earned between \$30,000 and \$40,000 per year. He/she usually stayed at a campground and arrived there through the use of his/her private vehicle. The source most frequently used to obtain information on the County was a mailed request. The attraction most respondents were aware of was Darien Lake Theme Park and Camping Resort, which was, not

NUMBER OF TIMES VISITED GENESEE COUNTY

Table 17

	Frequency	Percentage
One	78	22.8
Two	30	8.8
Three	49	14.3
Four	27	7.9
Five	27	7.9
More than Five	131	38.4

surprisingly, also the attraction most frequently visited. He/she rated the visit as an eight on a scale of one to ten, and had visited Genesee County more than five times.

Interestingly, several attraction/events had a higher visited percentage than awareness percentage. There are two possible reasons for this. First, the visited percentage also reflects what the potential market *would visit* when in Genesee County. Second, possibly the respondents were not aware of certain attractions before visiting the County or even before reading the questionnaire. Then, upon realization of an event, the respondent decided to engage in the attraction/event. The attraction/events that are included here were: farmer's market, Genesee County Mall, historic locations, factory outlets, Primeval Bergen Swamp Trails, Genesee County Fairgrounds, Genesee County Park, and Genesee Symphony. These attractions should be advertized more heavily in literature for higher participation rates. It seems clear that local advertising must be effective (or the questionnaire as advertising) since visitors visit attractions they were not previously aware of.

## PART II: MARKET SPENDING

This section includes information on the spending patterns of visitors to Genesee County. It answers the following questions: what is the accommodations expense in Genesee County; what is the food expense in Genesee County; what is the transportation expense in Genesee County; and what is the expense for personal items in Genesee County.

### What is the Accommodations Expense in Genesee County?

The spending patterns of tourists to Genesee County for accommodations were analyzed in a frequency table, Table 18, and were individually crosstabulated with each of the following: type of party, purpose of visit, and length of stay, resulting in Exhibits 11, 12 and 13.

Table 18 indicates the most frequent, 21.8 percent, per diem accommodations expense in Genesee County was between sixteen and thirty U.S. dollars. Extremely close in second at 21.1 percent were spendings of forty-six to sixty dollars. In third were those who spend between thirty-one and forty-five dollars. These were followed by only 13.5 percent spending

PER DIEM ACCOMMODATIONS EXPENSE IN GENESEE COUNTY  
(Campgrounds, Bed & Breakfasts, Hotels, Motels, Inns, etc)

Table 18

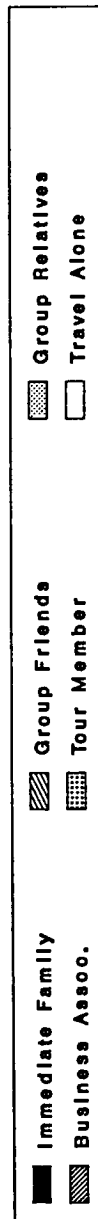
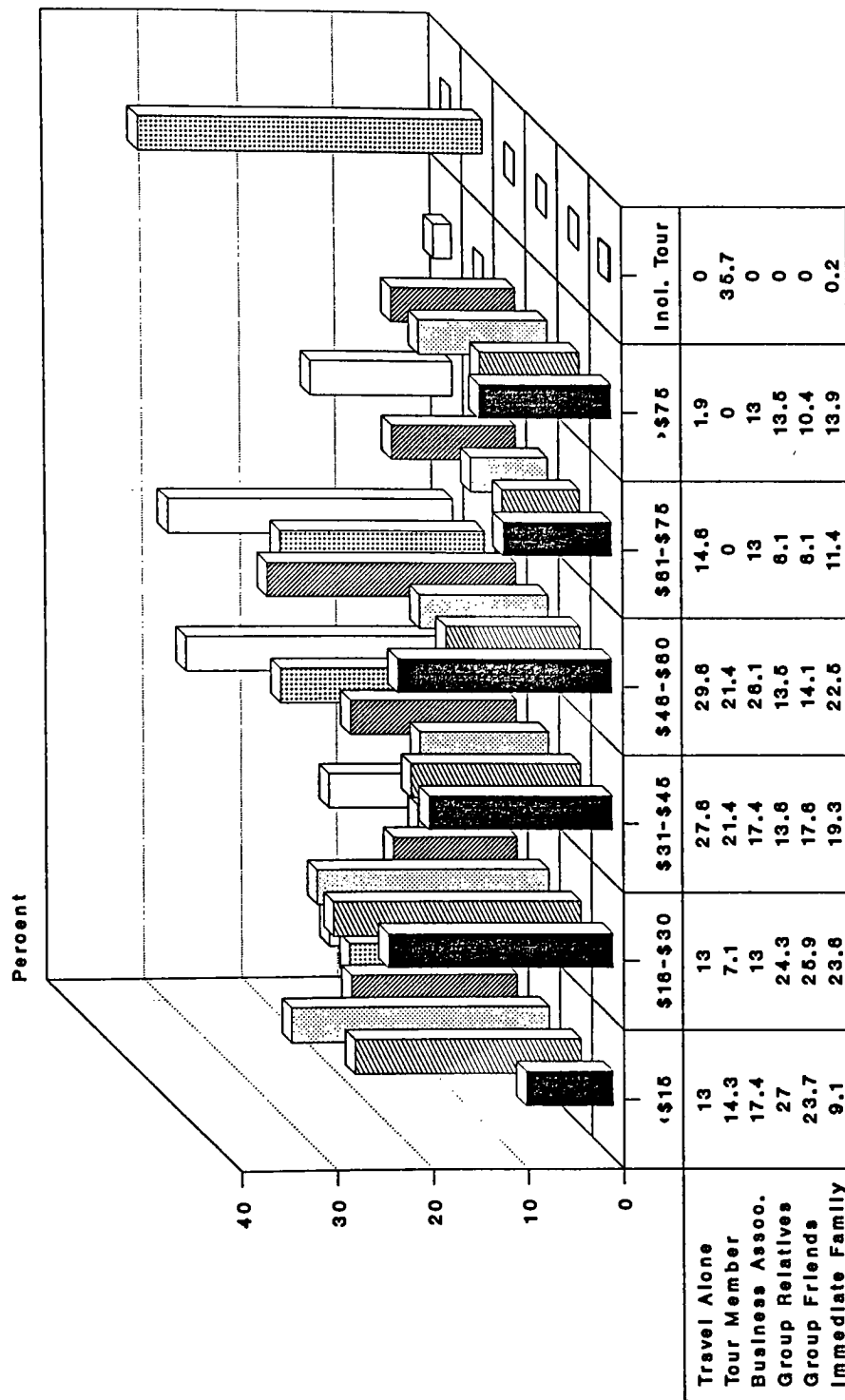
	Frequency	Percentage
Less than \$15	95	13.5
\$16 to \$30	159	21.8
\$31 to \$45	138	19.5
\$46 to \$60	149	21.1
\$61 to \$75	75	10.6
More than \$76	84	11.9

less than fifteen dollars; 11.9 percent spending more than seventy-six dollars; and 10.6 percent of those spending between sixty-one and seventy-five dollars per day, per party on accommodations in Genesee County.

Exhibit 11 illustrates that 65.4 percent of those visitors traveling with immediate family to Genesee County spent between sixteen and thirty U.S. dollars per day, per party on accommodations. Those traveling with a group of friends or a group of relatives were more conservative and budgeted under thirty dollars per day, per party at 49.6 percent and 51.3 percent respectively. Visitors who traveled with business associates spent between thirty-one and sixty dollars (43.5 percent) or fifteen dollars and less which accounts for 17.4 percent. This probably reflects whether or not their company paid for the accommodations. Those who traveled alone and those who were tour members spent similarly, between thirty-one and sixty dollars per day, per party, 47.3 percent and 42.8 percent respectively. This was generally true unless the tour member's accommodations were included in the tour, (35.7 percent).

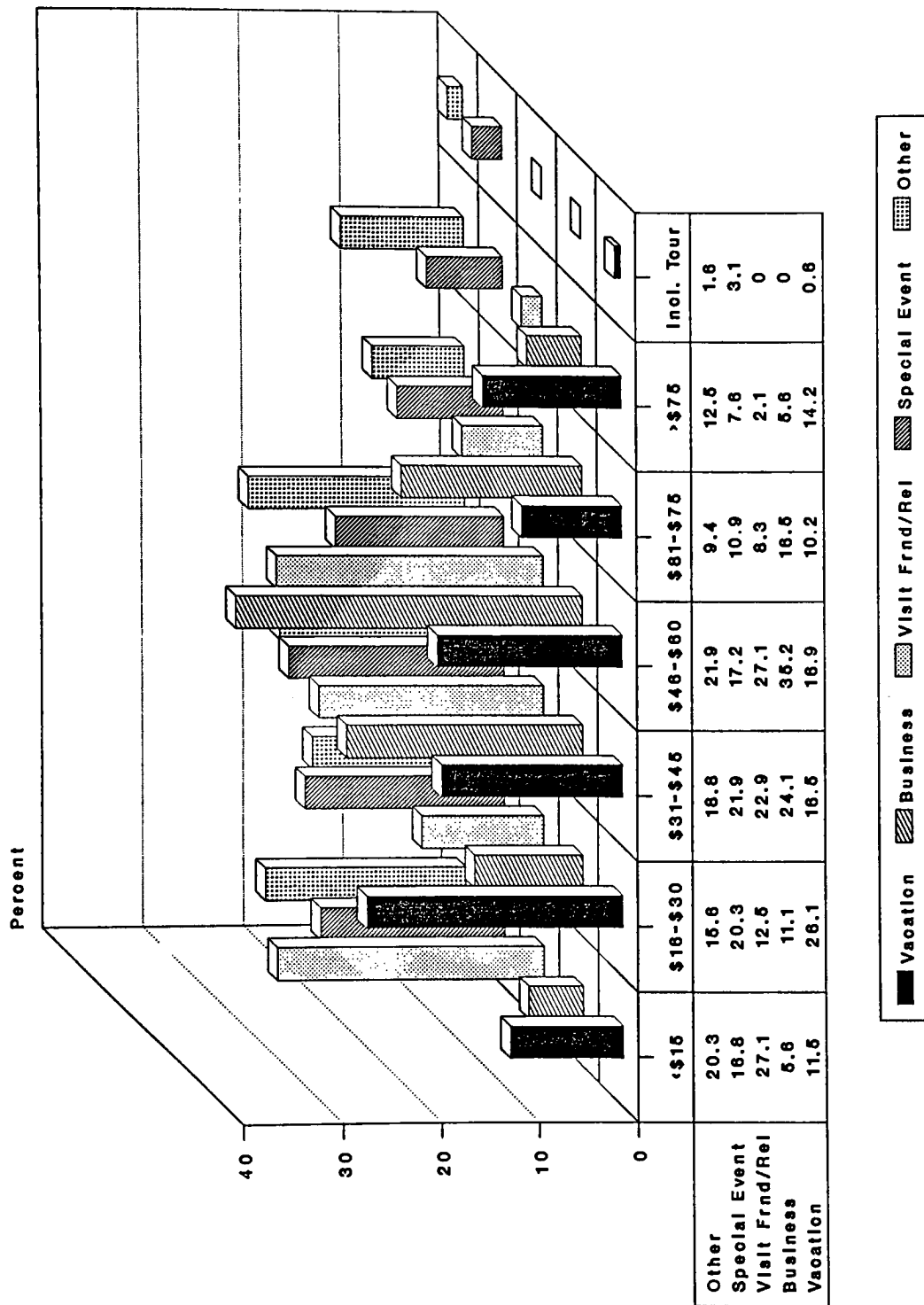
Exhibit 12 shows the vacation uses by purpose of visit. Most visitors, 63.5 percent, traveling to Genesee County on

# ACCOMMODATION BUDGET BY MARKET SEGMENT Exhibit 11



Genesee County Survey

# ACCOMMODATION BUDGET BY PURPOSE OF VISIT Exhibit 12

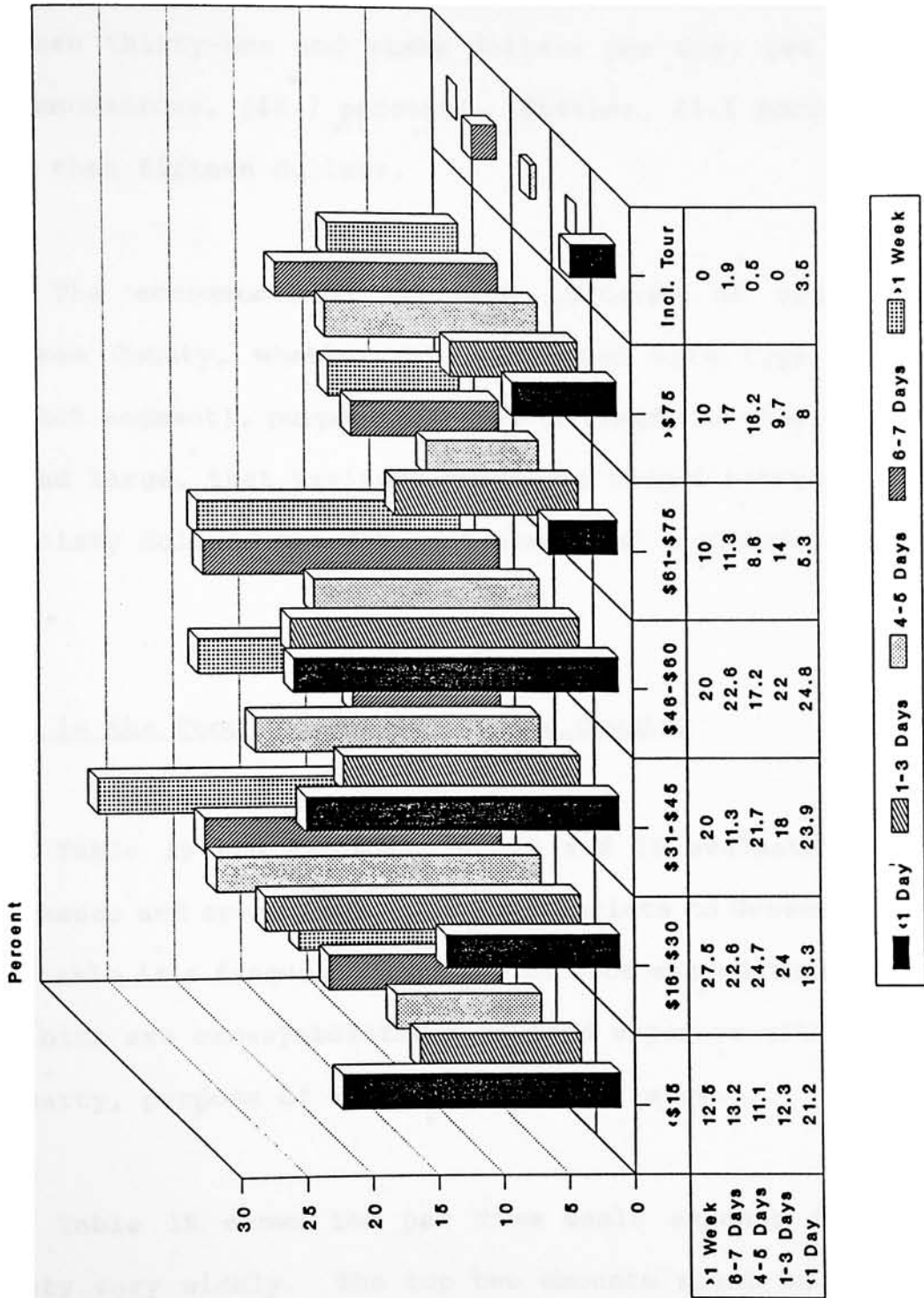


Genesee County Survey

vacation spent between sixteen and sixty dollars per day, per party on accommodations. Those traveling on business budgeted a little higher, thirty-one to seventy-five dollars per day, per party, which accounted for 77.8 percent of those respondents. Visitors who came to visit friends or relatives (VFR) and those who visited for "other" reasons budgeted quite similarly, either thirty-one to sixty dollars, 50 percent (VFR) and 40.7 percent (other) respectively. The fifteen dollars or less category represented a strong secondary pattern at 27.1 percent and 20.3 percent respectively, per day, per party. It probably depended on whether or not these groups were staying in the County or if they were staying with a friend or relative. Visitors traveling to Genesee County for a specific event spent about sixty dollars or less per day, per party on accommodations. This accounted for 78.2 percent of respondents.

Exhibit 13 shows the accommodations used in terms of length of stay. In general, visitors staying more than one day in Genesee County were likely to spend between sixteen and sixty dollars on accommodations, per day per party. The percentages as they relate to length of stay were: one to three days, 64 percent; four to five days, 63.6 percent; six to seven days, 56.5 percent; and more than one week, 67.5

# ACCOMMODATION BUDGET BY LENGTH OF STAY Exhibit 13



Genesee County Survey

percent. The one exception were the visitors who stayed less than one day. That group of individuals typically spent between thirty-one and sixty dollars per day, per party on accommodations, (48.7 percent). Further, 21.1 percent spent less than fifteen dollars.

The accommodation spending patterns of visitors to Genesee County, whether crosstabulated with type of party (market segment), purpose of stay, or length of stay indicated by and large, that visitors tended to budget between sixteen and sixty dollars per day, per party for accommodations.

#### What is the Food Expense in Genesee County?

Table 19 and Exhibits 14, 15 and 16 evaluate the food purchases and spending patterns of tourists to Genesee County. The table is a frequency analysis of food expenditures and the exhibits are crosstabulations of food expenses with the type of party, purpose of stay and length of stay.

Table 19 shows the per diem meals expense in Genesee County vary widely. The top two amounts spent on food were between eleven and fifteen dollars per day, per party at 21.1

PER DIEM MEALS EXPENSE IN GENESEE COUNTY  
(Breakfast, Lunch, Dinner)

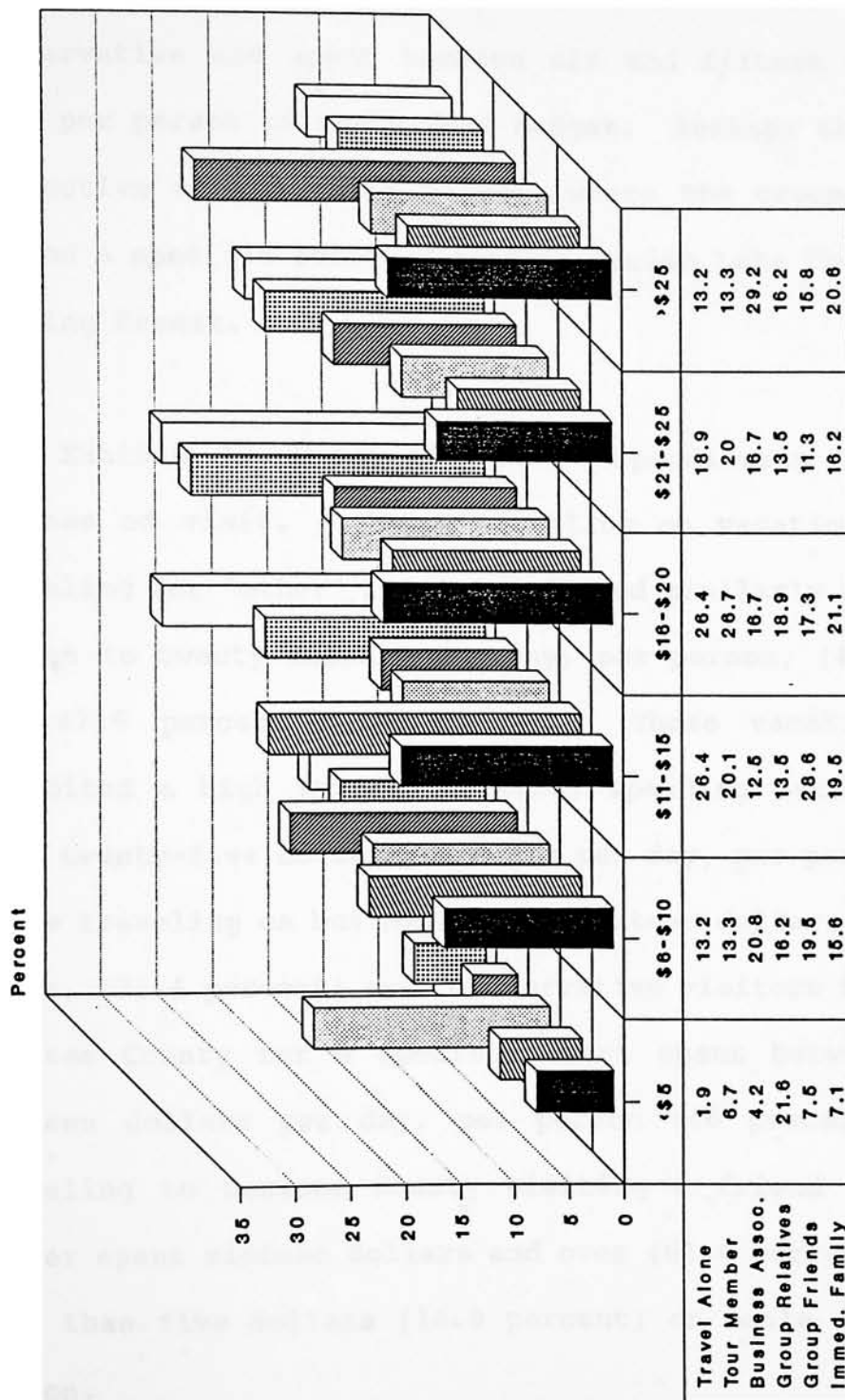
Table 19

	Frequency	Percentage
Less than \$5	52	7.4
\$6 to \$10	114	16.2
\$11 to \$15	148	21.1
\$16 to \$20	146	20.8
\$21 to \$25	109	15.5
More than \$26	133	18.9

percent, and between sixteen and twenty dollars per day, per party at 20.8 percent. While a high percentage, 18.9 percent, reported more than twenty-six dollars spent on food each day, 16.2 percent reported between six and ten dollars spent on food. Only 7.4 reported spendings of less than five dollars per day, per party on food.

Exhibit 14 shows many diverse spending patterns within specific market groups. For example, those who traveled with their immediate family tended to spend either between eleven and twenty dollars per day, per person on food (40.6 percent) or over twenty-five dollars per day, per person (20.6 percent). This may be viewed as typical of vacationers. Those traveling with a group of relatives typically spent either between sixteen and twenty dollars (18.9 percent) or less than five dollars (21.6 percent) per day, per person. This would lead one to believe that the majority were eating at the home of the relatives. Business associate groups either spent six to ten dollars on food per day per person (20.8 percent) or over twenty-five dollars (29.2 percent). This would most likely be related to business luncheons or dinners. Tour members tended to spend between eleven and twenty-five dollars per day, per person, (66.8 percent), while those who traveled alone were a bit more conservative and

# FOOD EXPENDITURE BY MARKET SEGMENT Exhibit 14



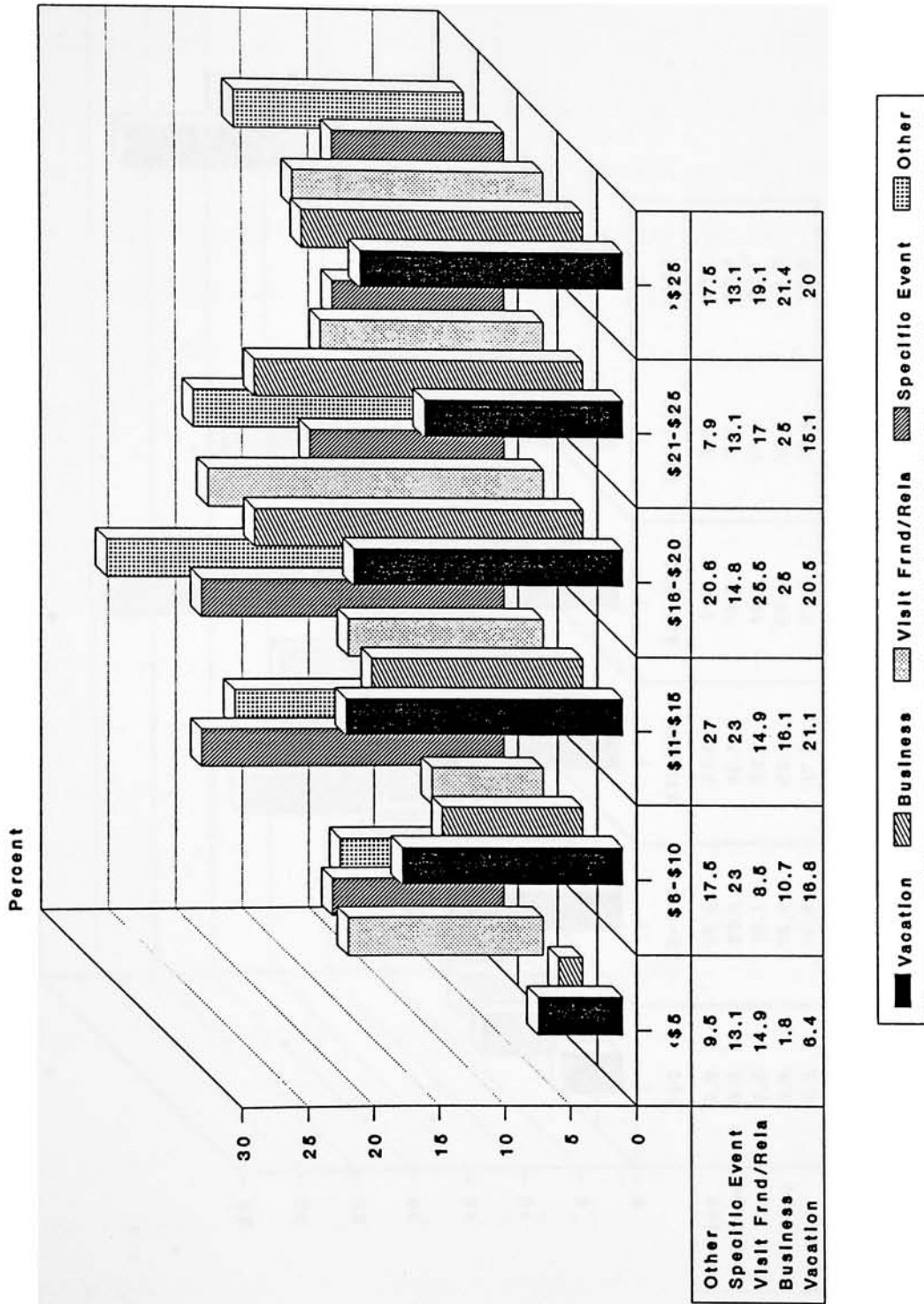
Immed. Family	Group Friends	Group Relatives
Business Assoc.	Tour Member	Travel Alone

Genesee County Survey

spent between eleven and twenty dollars (52.8 percent). Those who traveled with a group of friends were much more conservative and spent between six and fifteen dollars per day, per person on their food budget. Perhaps this might be reflective of the youth market, where the group of friends attend a specific event or perhaps Darien Lake Theme Park and Camping Resort.

Exhibit 15 shows the food expenditures relative to purpose of visit. Those traveling on vacation and those traveling for "other" reasons budgeted similarly for food, at eleven to twenty dollars per day, per person, (41.6 percent and 47.6 percent respectively). Those vacationing also exhibited a high (twenty percent) spending pattern at more than twenty-five dollars on meals per day, per person. While those traveling on business spent sixteen dollars and over on meals, (71.4 percent) more conservative visitors traveling to Genesee County for a specific event spent between six and fifteen dollars per day, per person (46 percent). Those traveling to Genesee County visiting a friend or relative either spent sixteen dollars and over (61.6 percent) or spent less than five dollars (14.9 percent) on meals per day, per person.

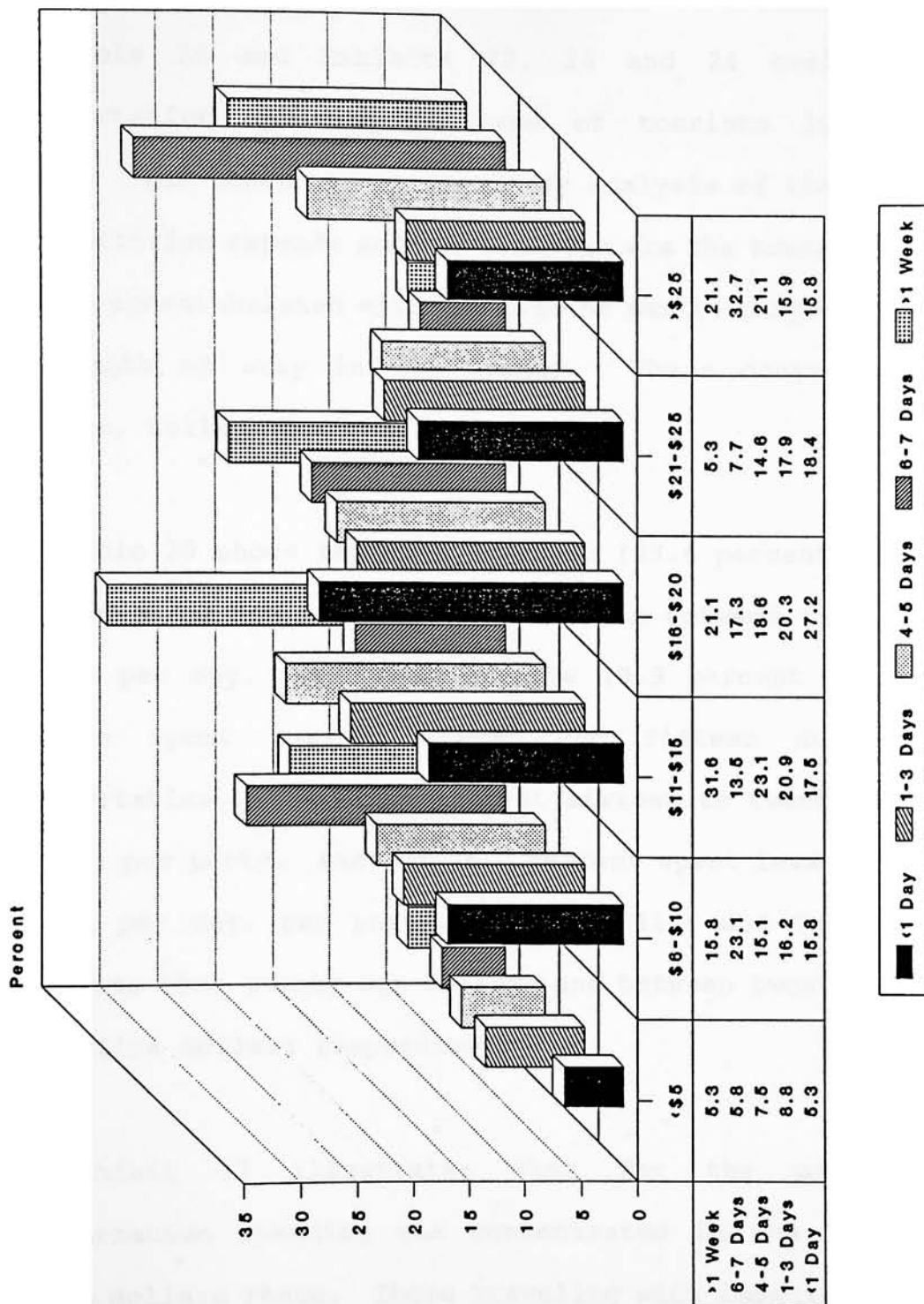
# FOOD EXPENDITURE BY PURPOSE OF VISIT Exhibit 15



Genesee County Survey

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# FOOD EXPENDITURE BY LENGTH OF STAY Exhibit 16



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### What is the Transportation Expense in Genesee County?

Table 20 and Exhibits 22, 23 and 24 evaluate the transportation spending patterns of tourists in Genesee County. The table uses a frequency analysis of the per diem transportation expense and the exhibits are the transportation expense crosstabulated with the type of party, purpose of stay and length of stay in the County. These costs included gasoline, tolls, etc.

Table 20 shows the most frequent (23.6 percent) expense for transportation in Genesee County was between six and ten dollars per day, per party. While 19.9 percent of County visitors spent between eleven and fifteen dollars on transportation, 17.9 percent spent sixteen to twenty dollars per day, per party. Another 16.7 percent spent less than five dollars per day, per party, but only 11.4 and 9.4 percent spent more than twenty-six dollars and between twenty-one and twenty-five dollars respectively.

Exhibit 17 illustrates that for the most part, transportation spending was concentrated in the less than fifteen dollars range. Those traveling with immediate family spent between six and twenty dollars per day, per party, and

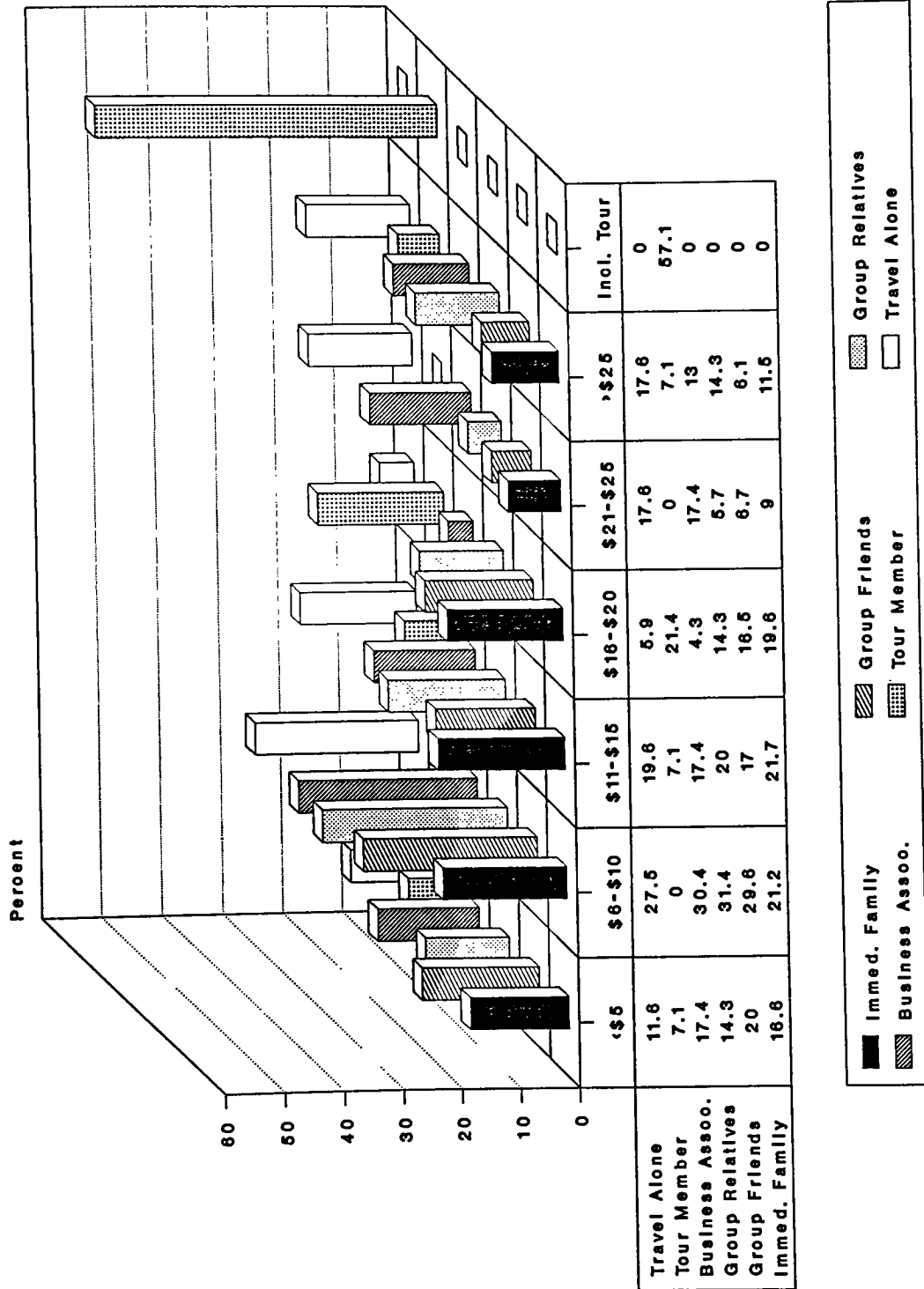
PER DIEM TRANSPORTATION EXPENSE IN GENESEE COUNTY  
(Gas, Tolls)

Table 20

	Frequency	Percentage
Less than \$5	116	16.7
\$6 to \$10	164	23.6
\$11 to \$15	138	19.9
\$16 to \$20	124	17.9
\$21 to \$25	65	9.4
More than \$26	79	11.4

# TRANSPORTATION EXPENSE BY MARKET SEGMENT

## Exhibit 17



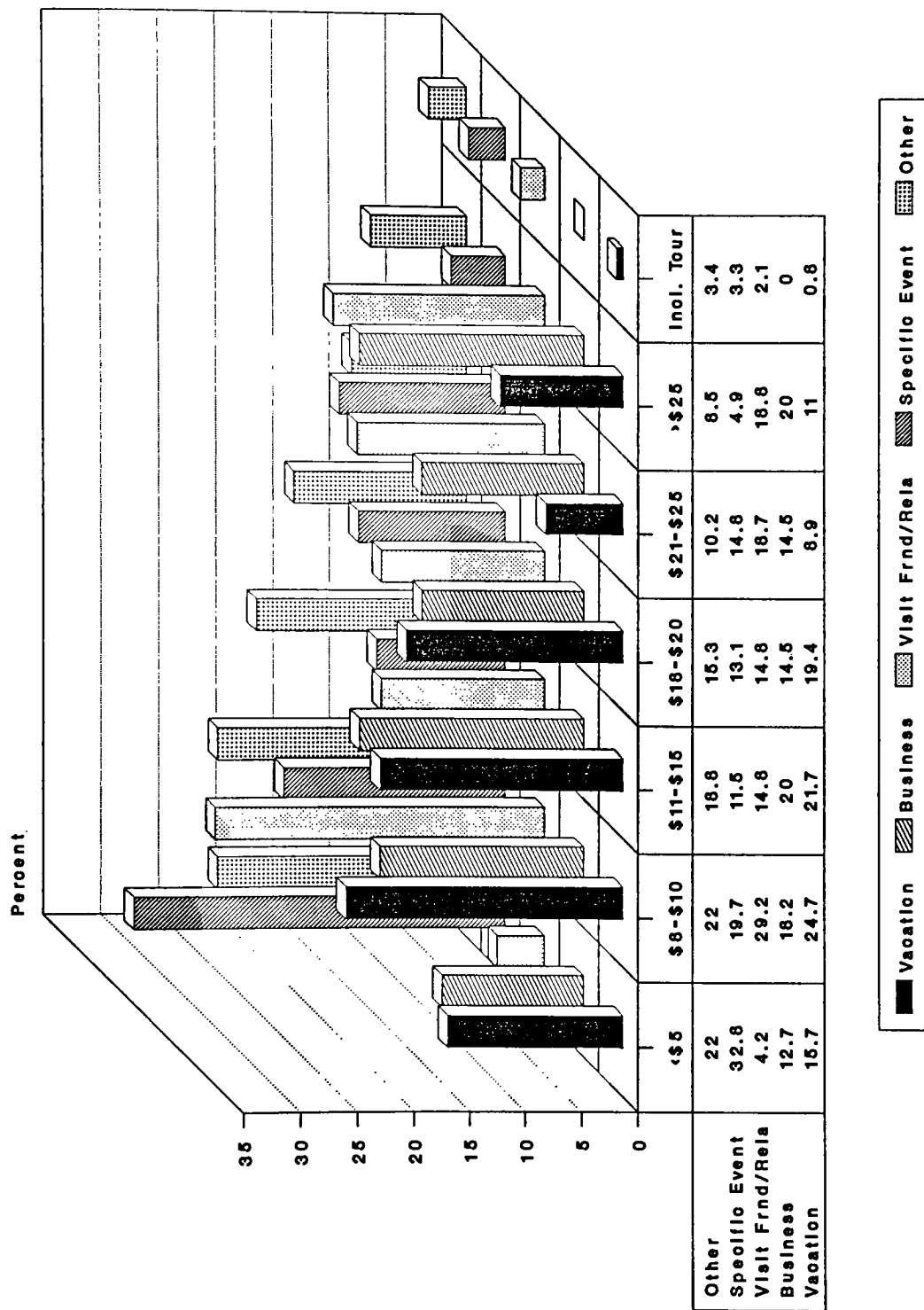
Genesee County Survey

accounted for 62.7 percent of those respondents. Those who traveled with a group of relatives and those who traveled alone budgeted between six and fifteen dollars per day, per party at 51.4 percent and 47.1 percent respectively. On the more conservative side were business associates and group of friends whose travel expenses were under fifteen dollars and under ten dollars respectively (65.2 percent and 49.6 percent respectively). Those traveling as a tour member were the exception to the fifteen dollars and under range. They reported spendings of sixteen to twenty dollars, (21.4 percent); while 57.1 percent reported that expense to be included in the tour.

Exhibit 18 indicated a strong concentration of spending of less than fifteen dollars on transportation with a minor concentration in the range of twenty-one dollars or more, which perhaps is due to greater distance, recreation vehicles, or possibly even that the latter portion of the surveys were received after the fuel price increase. Visitors traveling on vacation budgeted between six and twenty dollars per day, per party on transportation expenses, which accounted for 65.8 percent of those respondents. Business travelers spent a bit less, between six and fifteen dollars (38.2 percent) or more than twenty-five dollars (twenty percent) on transportation

# TRANSPORTATION EXPENSE BY VISIT PURPOSE

## Exhibit 18



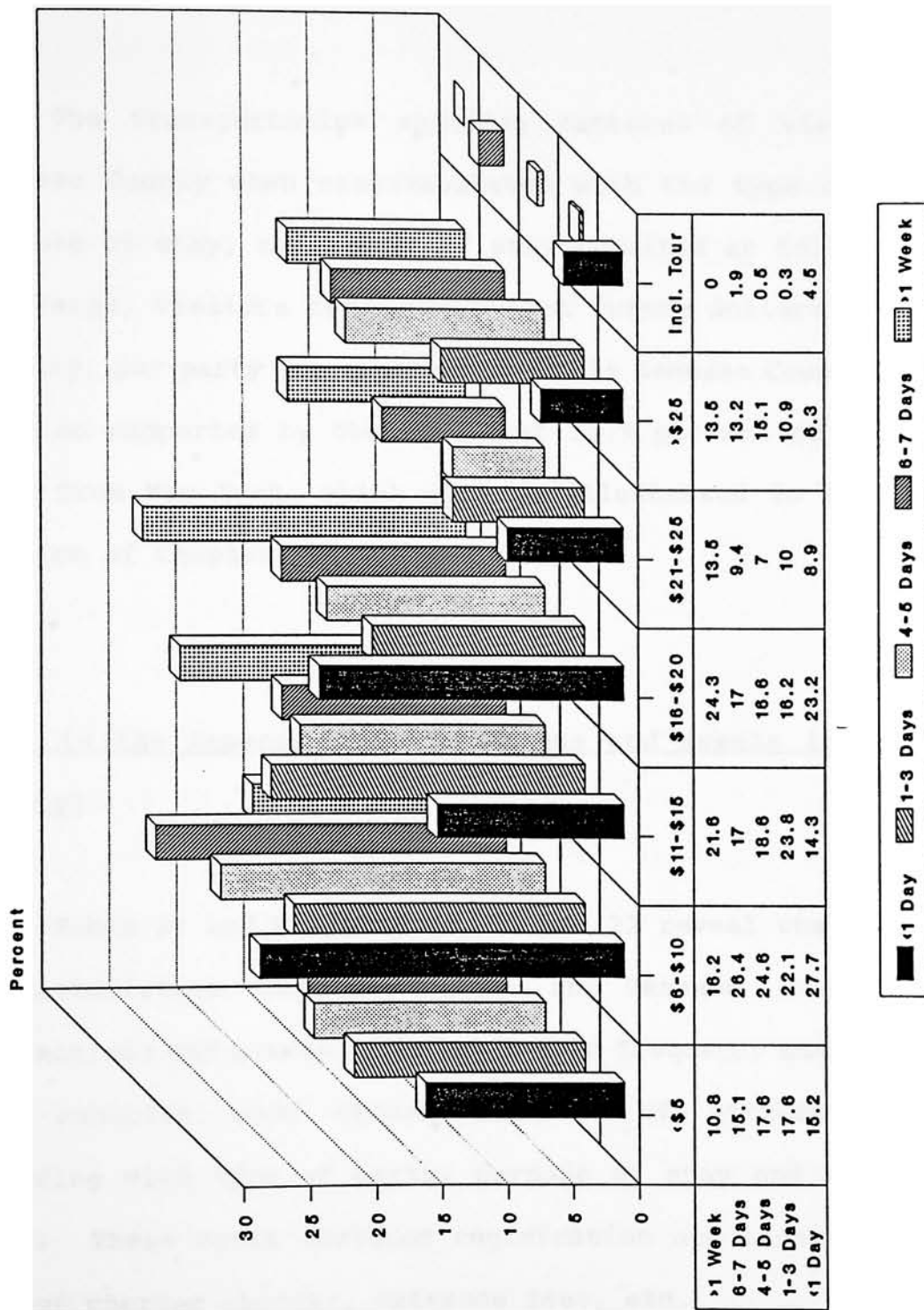
Genesee County Survey

expenses, the latter possibly attributed to car rentals. Those visiting friends or relatives were also a split group. 29.2 percent spent six to ten dollars per day, per party on transportation and 35.5 percent spent twenty-one dollars and over on transportation. On the more conservative side were those who travel to Genesee County for a specific event and those who travel to the County for "other" reasons. While 52.5 percent of those visiting a specific event spent ten dollars and under, as do forty-four percent of those visiting Genesee County for other reasons.

Exhibit 19 reveals that all transportation expenses were concentrated between six and twenty dollars no matter how long the length of visit. Those visitors staying less than one day spent between six and twenty dollars, which accounted for 65.2 percent of those respondents. Visitors staying one to three days and visitors staying four to five days budgeted similarly and both reported spendings of six to fifteen dollars with percentages of 45.9 percent and 43.2 percent respectively. Those who stay six to seven days spent similarly to those staying less than one day, between six and twenty dollars, which accounted for 60.4 percent of those respondents. Spending a bit more on the higher side were those who stay more than one week, 45.9 percent tended to spend between

# TRANSPORTATION EXPENSE BY LENGTH OF STAY

## Exhibit 19



Genesee County Survey

eleven and twenty dollars per day, per party on transportation in Genesee County.

The transportation spending patterns of visitors to Genesee County when crosstabulated with the type of party, purpose of stay, and length of stay resulted as follows. By and large, visitors tended to budget twenty dollars and less per day, per party for transportation in Genesee County. This is also supported by the fact that 54.9 percent of visitors were from New York, which will be illustrated in the final section of Chapter IV.

#### What is the Expense for Attractions and Events in Genesee County?

Table 21 and Exhibits 20, 21 and 22 reveal the spending characteristics tourists have in Genesee County for attractions and events. The table used frequency analysis and the exhibits were crosstabulations of attraction/event spending with type of party, purpose of stay and length of stay. These costs included registration and licensing fees and or charter charges, entrance fees, etc.

Table 21 shows that the most prominent per diem attraction/events expense in Genesee County was between eleven and fifteen dollars at 21.7 percent. While 18.9 percent of visitors to the County reported spendings between sixteen to twenty dollars, eighteen percent spent more than twenty-five dollars. Another 17.8 percent reported expenditures between six to ten dollars. Only 11.7 percent spent less than five dollars and 10.3 percent spent between twenty-one and twenty-five dollars per day, per party on attraction/events in Genesee County.

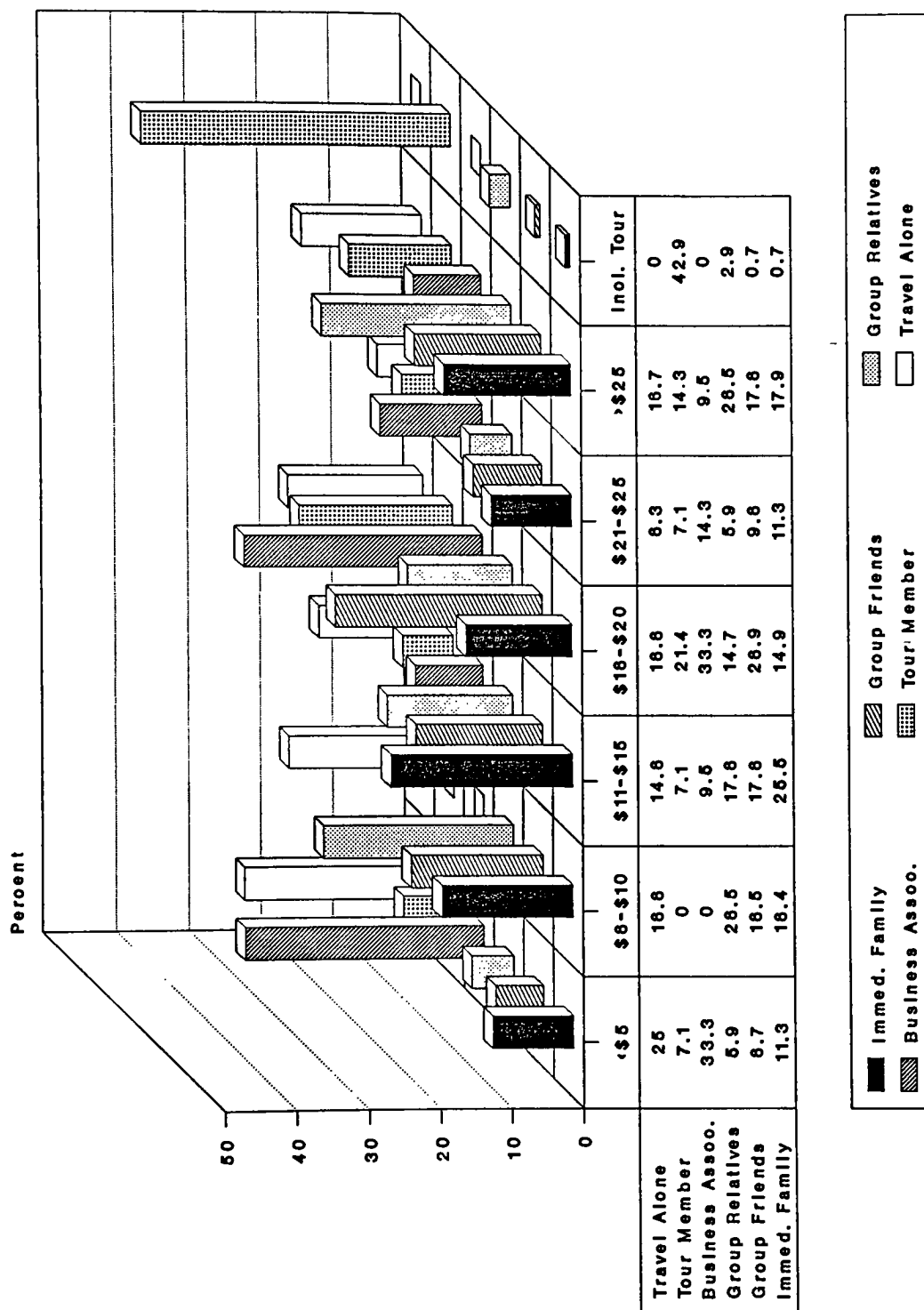
Exhibit 20 indicates that although spendings were diverse on the attraction and event budgets, for the most part, many fell within the six to twenty dollars range. For example, 65.2 percent of those traveling with a group of friends spent between six and twenty dollars per day, per person on attractions and events. Those traveling with their immediate family spent on average five dollars less, six to fifteen dollars, which accounted for 43.9 percent. Those traveling alone were more conservative, spending less than ten dollars per day, per person. The remaining three types of party were split, probably depending on what attraction or event they were participating in. Those traveling as a tour member and those traveling with business associates both reported

PER DIEM ATTRACTION/EVENTS EXPENSE IN GENESEE COUNTY  
(Entrance fee, Charter fee, Parking fee, etc.)

Table 21

	Frequency	Percentage
Less than \$5	79	11.7
\$6 to \$10	121	17.8
\$11 to \$15	147	21.7
\$16 to \$20	128	18.9
\$21 to \$25	70	10.3
More than \$26	122	18.0

# ATTRACTION EXPENDITURE BY MARKET SEGMENT Exhibit 20

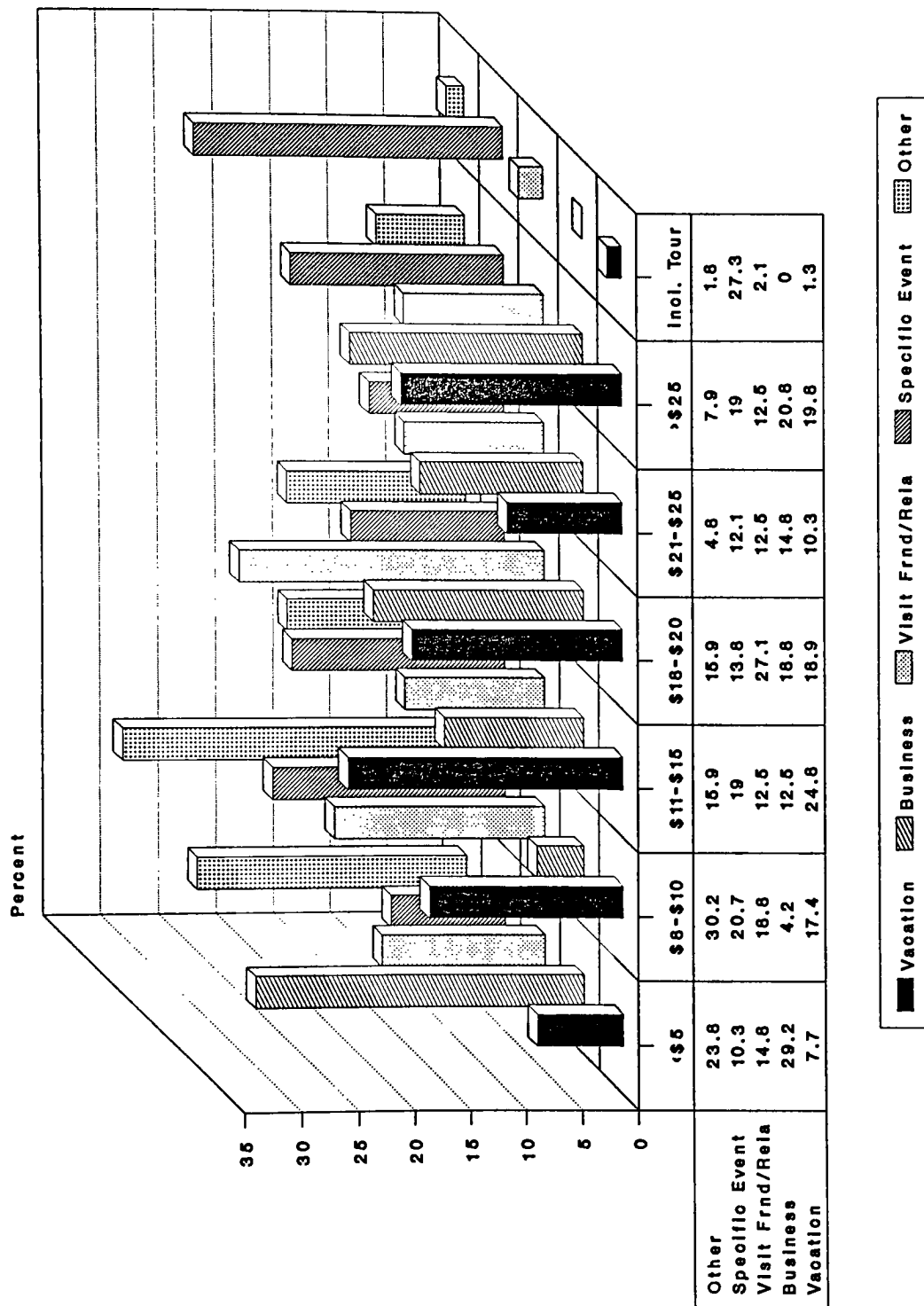


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spendings between sixteen and twenty dollars at 21.4 and 33.3 percent respectively, but each also reported spendings in other ranges. While 42.9 percent of tour members reported that attractions and events were included in the tour expense, 33.3 percent reported spendings of less than five dollars. Of those who traveled with a group of relatives, 26.5 percent spent six to ten dollars, while another 26.5 percent spent more than twenty-five dollars.

Exhibit 21 shows spendings on attractions and events reflect two distinct groups; the first is sixteen to twenty dollars and the second more than twenty-five dollars. Again the spending ranges probably depended on which attraction or event was participated in. For example, those who travel on vacation spent either eleven to twenty dollars, 43.5 percent or over twenty-five dollars, 19.8 percent on events or attractions per day, per person. Of those who travel to Genesee County for a specific event, 39.7 percent budgeted either six to fifteen dollars or 19 percent budgeted over twenty-five dollars for attractions or events. Business associates either spent close to nothing on attractions or events (less than five dollars) which accounted for 29.2 percent of those respondents or they spent a great deal, sixteen dollars and over, which accounted for 54.2 percent of

# ATTRACTION EXPENDITURE BY VISIT PURPOSE Exhibit 21

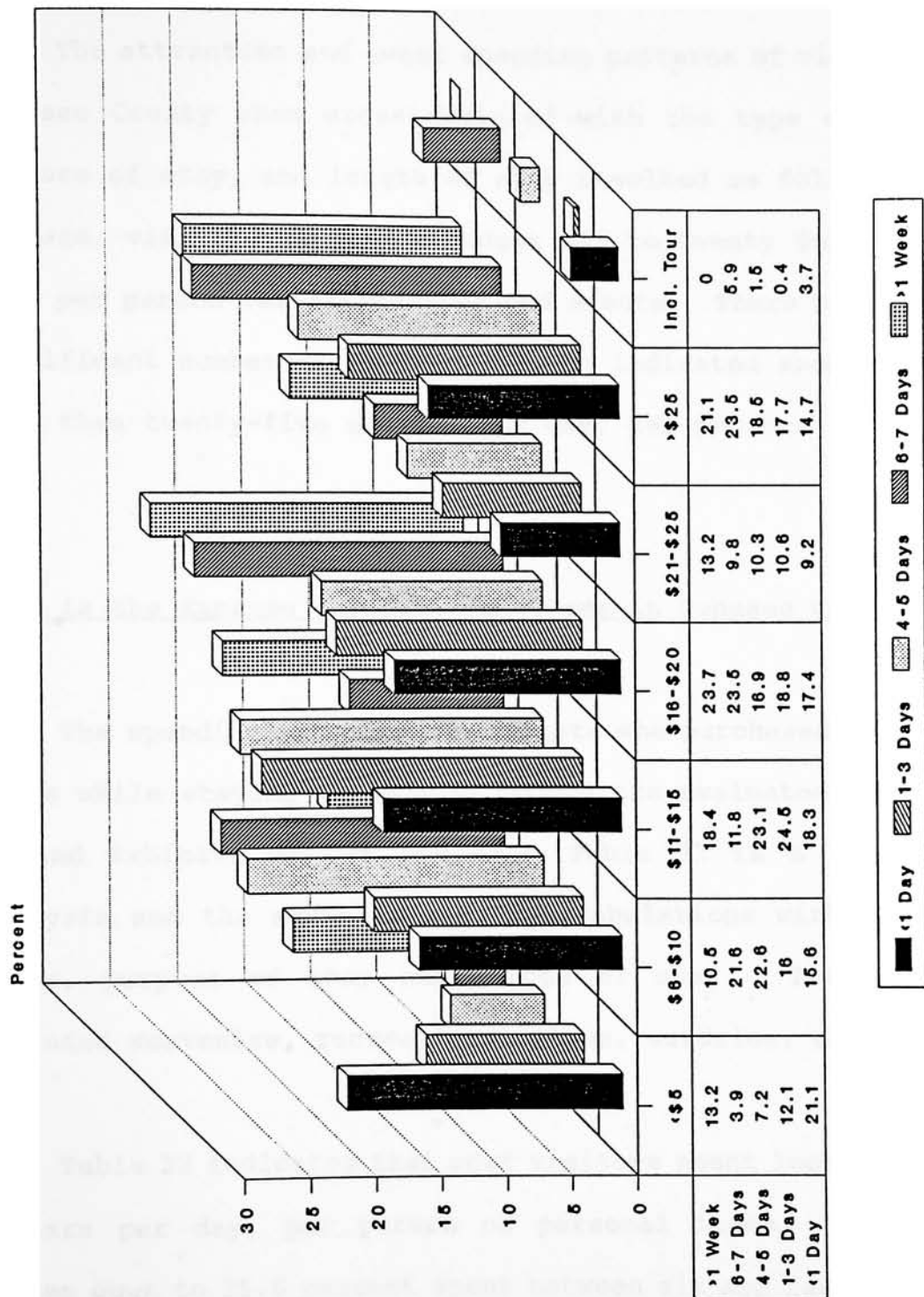


Genesee County Survey

the business travelers. Another 58.4 percent of travelers who visited friends or relatives spent six to twenty dollars. On the more conservative side, those who visited Genesee County for "other" reasons spent less than ten dollars per day, per person on attractions and events.

Exhibit 22 illustrates again two distinct spending patterns, the first is six to twenty dollars and the second over twenty-five dollars. It also appears that the longer the stay, the greater the spending per day, per person on attractions and events. Those visitors who stayed more than one week spent sixteen dollars and over, which accounted for fifty-eight percent of those respondents. Those staying six to seven days and those staying four to five days both had split budget ranges. While 56.9 percent of those staying six to seven days spent six to twenty dollars per day, per person, 23.5 percent spent over twenty-five dollars. Also, 45.7 percent of those staying four to five days spent six to fifteen dollars per day, per person or 18.5 percent spent over twenty-five dollars on attractions and events. Visitors staying one to three days spent eleven to twenty dollars, which accounted for 43.3 percent of those respondents. On the most conservative side, fifty-five percent of those who stayed less than one day budgeted fifteen dollars or less per day,

# ATTRACTION EXPENDITURE BY LENGTH OF STAY Exhibit 22



Genesee County Survey

per person for attractions and events in Genesee County.

The attraction and event spending patterns of visitors to Genesee County when crosstabulated with the type of party, purpose of stay, and length of stay resulted as follows. On average, visitors tended to budget six to twenty dollars per day, per person for attractions and events. There was also a significant number of respondents who indicated spendings of more than twenty-five dollars per day, per person.

#### What is the Expense for Personal Items in Genesee County?

The spending patterns of tourists who purchased personal items while staying in Genesee County are evaluated in Table 22 and Exhibits 23, 24 and 25. Table 22 is a frequency analysis and the exhibits are crosstabulations with type of party, purpose of stay and length of stay. These costs included souvenirs, recreational items, sundries, etc.

Table 22 indicates that most visitors spent less than ten dollars per day, per person on personal items. This was broken down to 25.6 percent spent between six and ten dollars, and 24.9 percent spent less than five dollars on personal

PER DIEM PERSONAL ITEMS EXPENSE IN GENESEE COUNTY  
(Souvenirs, sundries, recreation equipment rentals, etc.)

Table 22

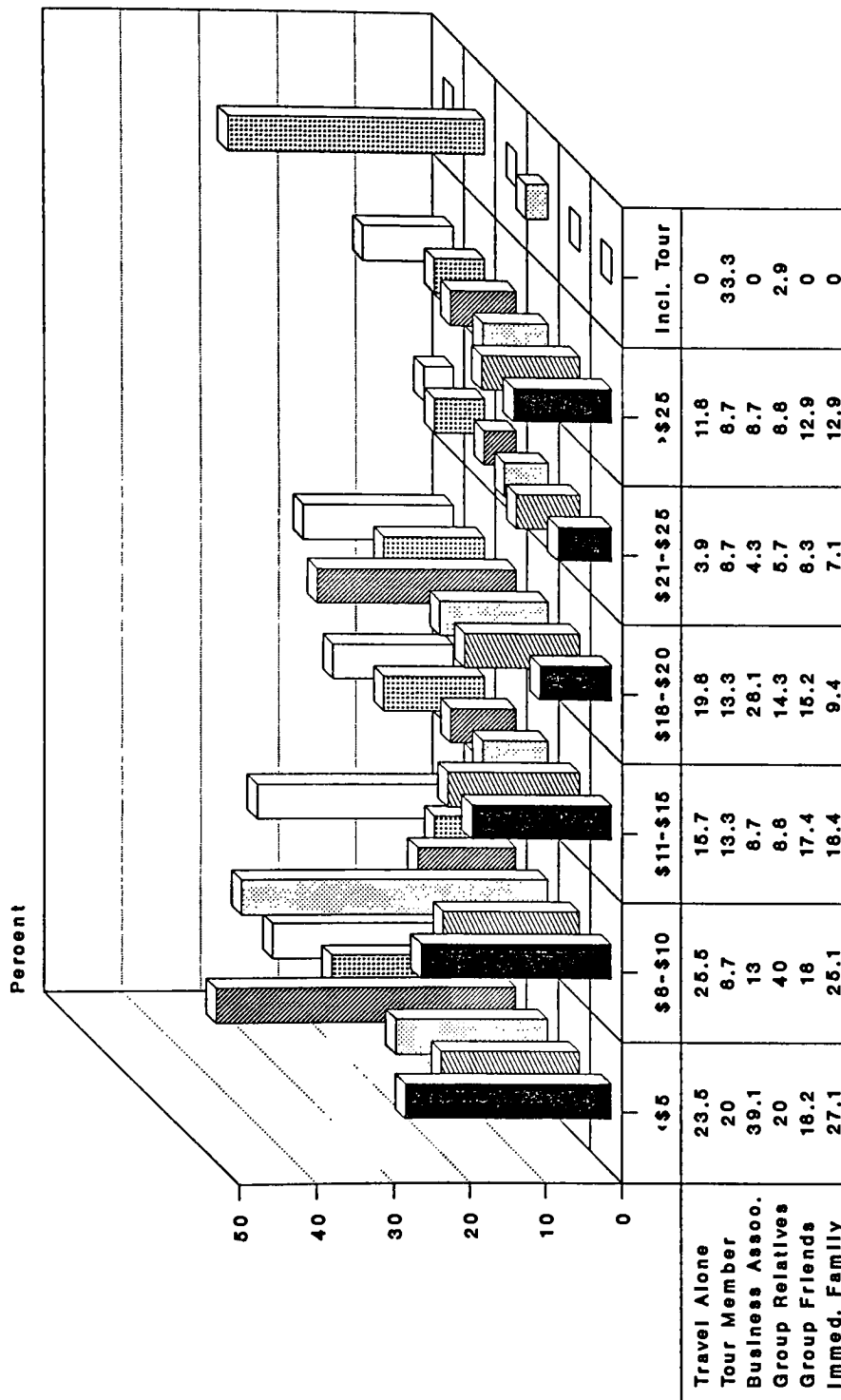
	Frequency	Percentage
Less than \$5	173	24.9
\$6 to \$10	178	25.6
\$11 to \$15	120	17.3
\$16 to \$20	84	12.1
\$21 to \$25	48	6.9
More than \$26	86	12.4

items. Another 17.3 percent spent between eleven and fifteen dollars per day, per person. While 12.4 percent spent more than twenty-six dollars on personal items daily, 12.1 percent spent between sixteen and twenty dollars. Only 6.9 percent spent between twenty-one and twenty-five dollars per day, per person on personal items in Genesee County.

Exhibit 23 reveals that visitors to Genesee County did not spend very much on personal items. For the most part, spendings were ten dollars or less. For example, those traveling with their immediate family, a group of relatives or traveling alone all spent ten dollars or less per day, per person on personal expenditures, 52.2 percent, sixty percent, and forty-nine percent respectively. Visitors traveling with business associates and those traveling on a tour both spent less than five dollars per day, per person, 39.1 percent and twenty percent respectively, but they each were high in other spending ranges. While 26.1 percent of those traveling with business associates also spent between sixteen and twenty dollars, 33.3 percent of those traveling on a tour reported their personal budget was included in the tour expenses. Visitors traveling with a group of friends spent fifteen dollars or less, per day per person on personal items in Genesee County, which accounted for 53.6 percent of those

# PERSONAL EXPENDITURE BY MARKET SEGMENT

## Exhibit 23



Immed. Family	Group Friends	Group Relatives
Business Asso.	Tour Member	Travel Alone

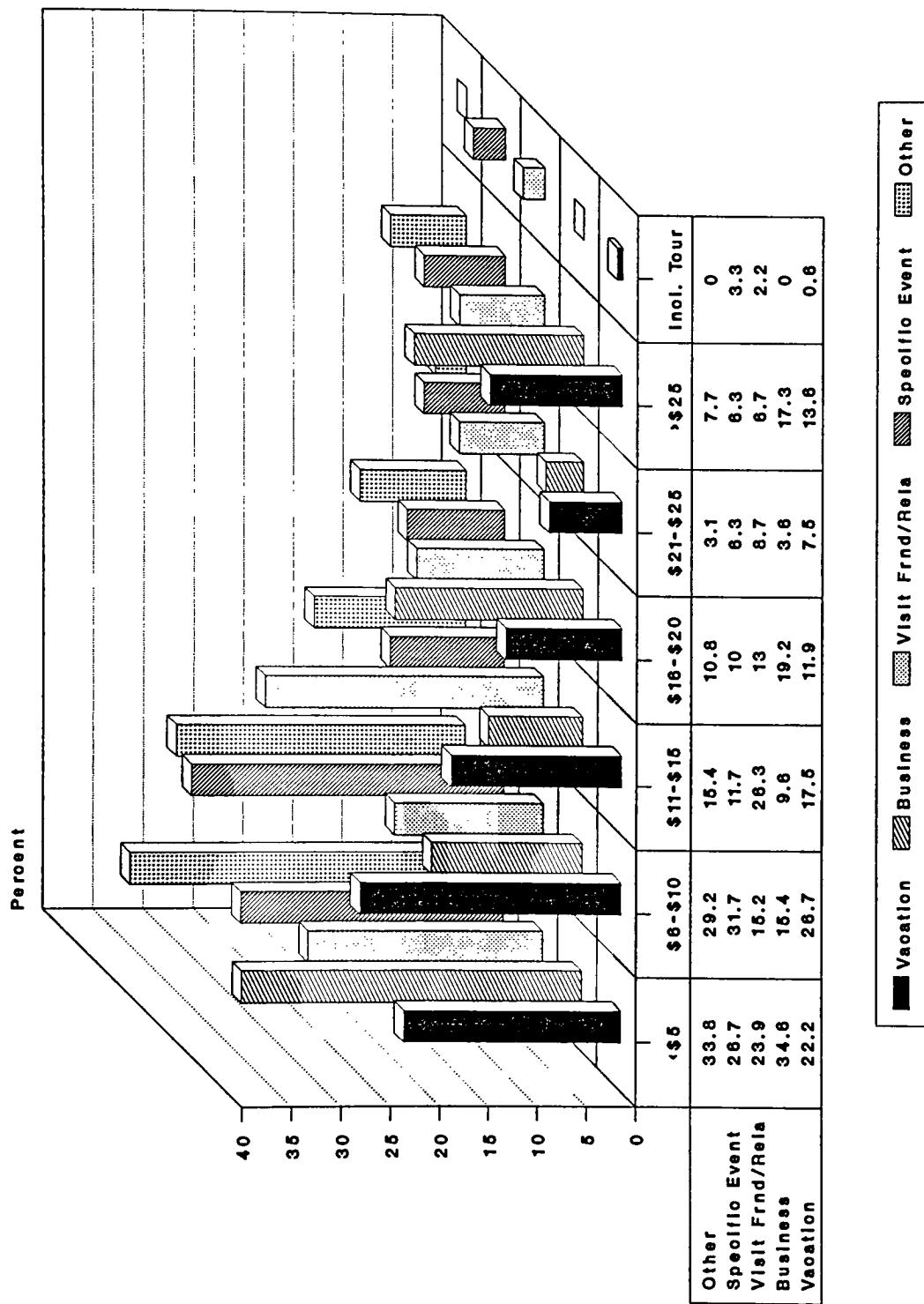
Genesee County Survey

respondents.

Exhibit 24 illustrates by in large spendings were concentrated in the under ten dollars range no matter what the purpose of stay. Of those traveling to Genesee County on vacation, 66.4 percent spent fifteen dollars and under per day, per person on personal items. Visitors traveling to Genesee County for a specific event and for "other" reasons spent ten dollars or less on personal items, 58.4 percent and sixty-three percent respectively, per day per person. Those respondents visiting friends or relatives, 67.4 percent budgeted fifteen dollars or less per day, per person. Lastly, those traveling on business were very diverse in their spending patterns. While 34.6 percent spent less than five dollars, 19.2 percent spent sixteen to twenty dollars and 17.3 percent spent twenty-five dollars or more, this made the business market segment the highest spending group on personal items per day, per person.

Exhibit 25 illustrates again that the highest concentration of spending was in the range of ten dollars or less per day, per person on personal items. Of those staying less than one day in Genesee County, sixty percent spent ten dollars or less per day, per person on personal items, as did

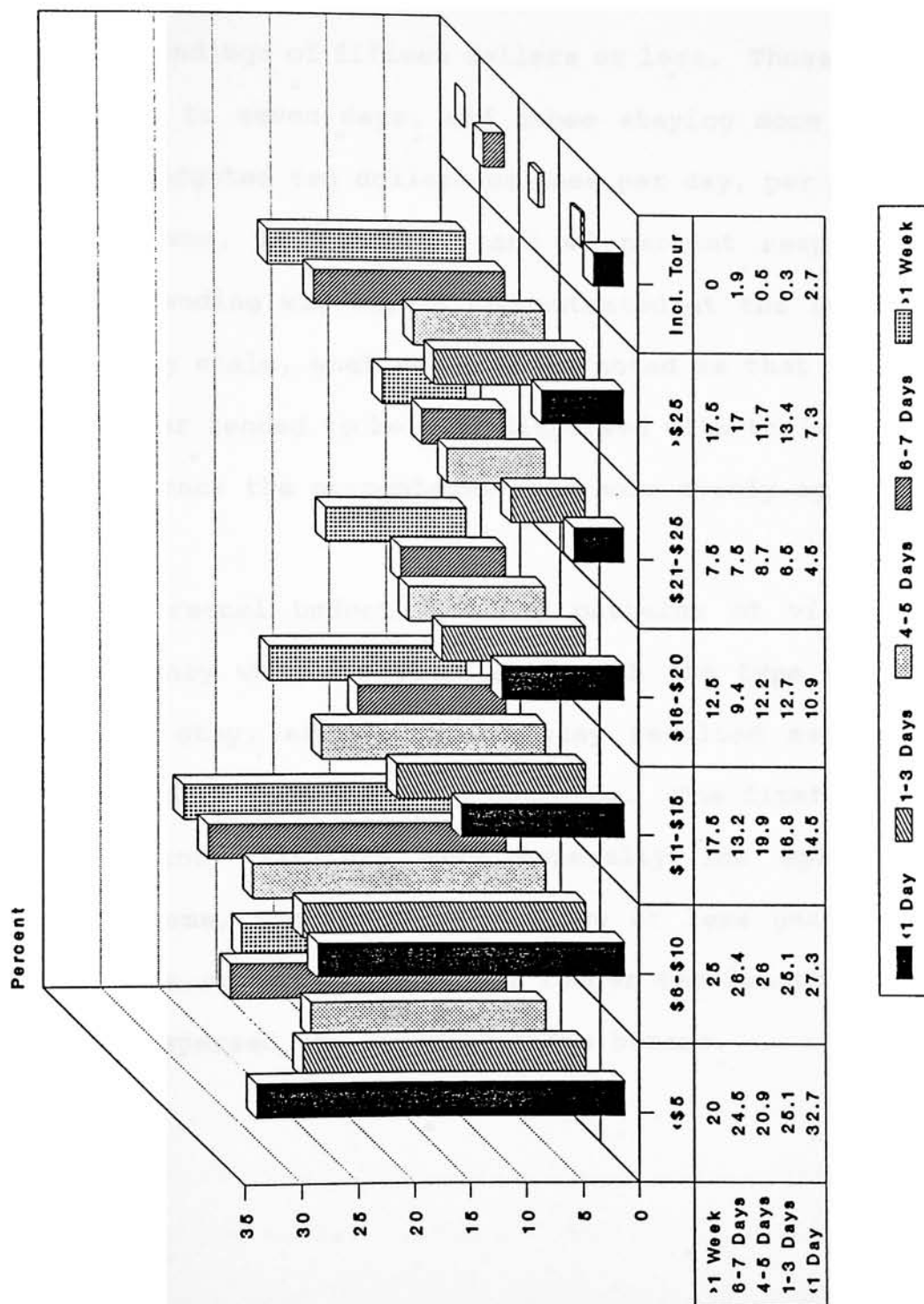
# PERSONAL EXPENDITURE BY PURPOSE OF VISIT Exhibit 24



Genesee County Survey

# PERSONAL EXPENDITURE BY LENGTH OF STAY

## Exhibit 25



Genesee County Survey

50.2 percent of those staying one to three days. Visitors staying four to five days spent a bit more, 66.8 percent reported spendings of fifteen dollars or less. Those visitors staying six to seven days, and those staying more than one week also budgeted ten dollars or less per day, per person on personal items, 50.9 percent and 45 percent respectively. Although spending was highly concentrated at the low end of the spending scale, what needs to be noted is that those who stayed longer tended to be more dispersed with their spending patterns, hence the percentages were more evenly spread out.

The personal budget spending patterns of visitors to Genesee County when crosstabulated with the type of party, purpose of stay, and length of stay resulted as follows. There tended to be two buying patterns. The first was that Genesee County visitors were generally low spenders on personal items, typically ten dollars or less per day, per person. The second was that the longer the length of stay, the more dispersed the spending range became.

## GENESEE COUNTY AS A HUB & SPOKE DESTINATION

The final section of this chapter will examine the positioning of visitors to and from Genesee County. Naming Genesee County the "hub" or central destination point, the first part of this section examines where the visitors came from, the internal spokes. Where the visitors went after the County represents the external spokes.

### Where Do the Visitors Come From?

Tables 23 through 26, Exhibits 27 and 28 and Figure 2 and 3 distinguish where the visitors of Genesee County came from. Each was based on frequency analysis.

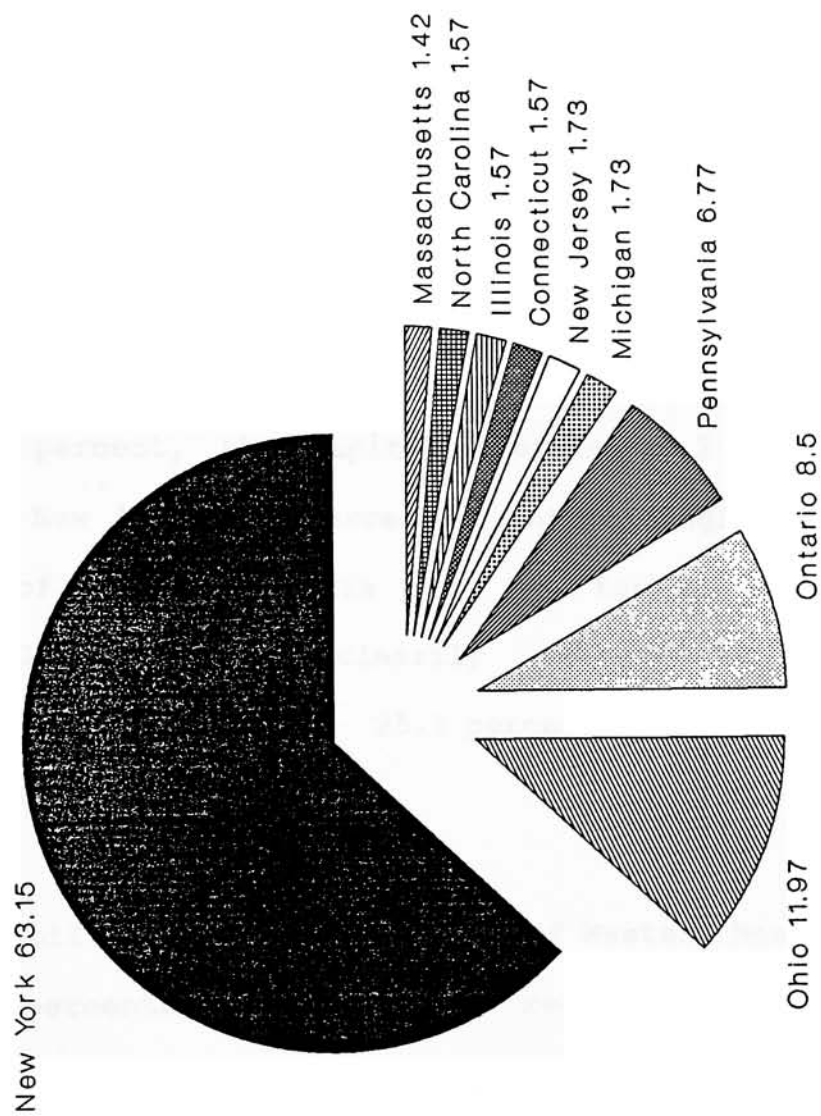
Almost seventy-nine percent of the visitors to Genesee County resided in the states/province of New York (54.9 percent), Ohio (10.4 percent), Ontario (7.3 percent), and Pennsylvania (5.9 percent) according to the state/province responses on the survey (Table 23, Exhibit 26). Another 8.4 percent of visitors came from Michigan (1.5 percent), New Jersey (1.5 percent), Connecticut (1.4 percent), Illinois (1.4

TOP 10 STATE/PROVINCE OF ORIGIN

Table 23

	Frequency	Percentage
New York	401	54.9
Ohio	76	10.4
Ontario	54	7.3
Pennsylvania	43	5.9
Michigan	11	1.5
New Jersey	11	1.5
Connecticut	10	1.4
Illinois	10	1.4
North Carolina	10	1.4
Massachusetts	9	1.2

# % OF TOP 10 STATE/PROVINCE OF ORIGIN Exhibit 26



percent), North Carolina (1.4 percent), and Massachusetts (1.2 percent).

Of all the visitors from New York State, the largest portion, twenty-six percent, were from the Western New York region as indicated in Table 24. The Southern Tier accounted for 8.4 percent of Genesee County visitors, while Central New York accounted for 7.6 percent. Downstate New York accounted for 7.4 percent, the Capital District 4.2 percent, and Northern New York 1.8 percent. Interestingly, fifty-five percent of the respondents from New York as a whole who visited Genesee County primarily classify their visiting party as immediate family; 25.1 percent described themselves as a group of friends.

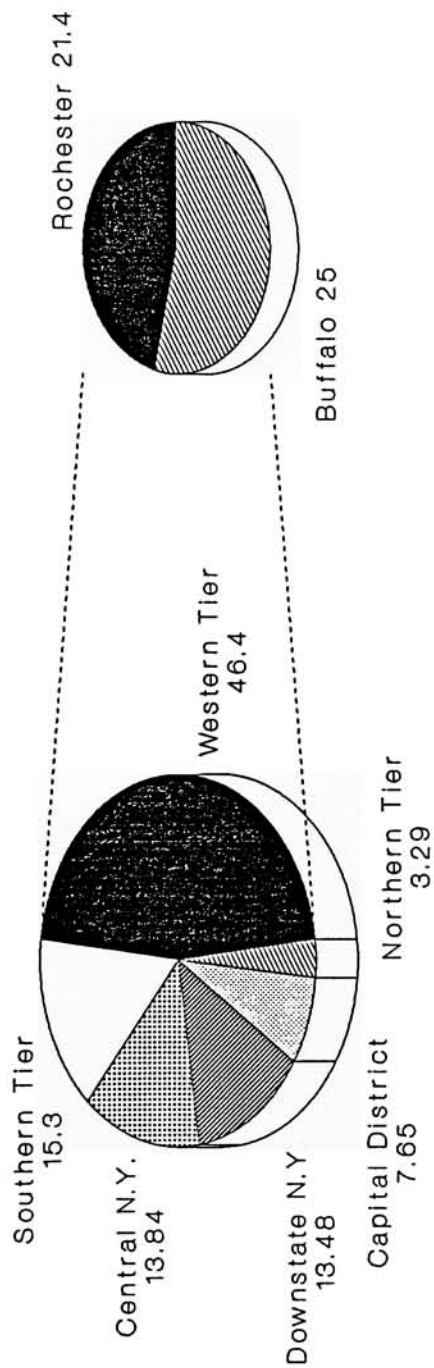
Exhibit 27 shows the breakdown of Western New York. The largest percentage of New York respondents, twenty-five percent, recorded their residence in Buffalo or in the immediate adjacent three-digit postal code districts of 140, 141, 142, and 143, while 21.4 percent are from Rochester three-digit postal code districts of 144, 145, and 146. These percentages represented the Western New York region and the cities are the top two cities of origin overall to Genesee County, at 13.7 and 11.8 percent respectively.

NEW YORK STATE VISITOR BY REGION

Table 24

City/Region	%	Total Region %	Region % of NY Total
Watertown	1.4	----	-----
Plattsburgh	.4	----	-----
<b>Upstate:</b>	----	1.8	3.29
 Syracuse	5.1	----	-----
Utica	2.5	----	-----
<b>Central:</b>	----	7.6	13.84
 Buffalo	13.7	----	-----
Rochester	11.8	----	-----
<b>Western:</b>	----	25.5	46.40
 Albany	2.1	----	-----
Poughkeepsie	1.4	----	-----
Glenns Falls	.7	----	-----
<b>Capital District:</b>	----	4.2	7.65
 Binghamton	3.6	----	-----
Jamestown	.7	----	-----
Elmira	4.0	----	-----
Endicott	.1	----	-----
<b>Southern Tier:</b>	----	8.4	15.30
 New York City, Long Island & Staten Island	7.3	----	-----
Monticello	.1	----	-----
<b>Downstate:</b>	----	7.4	13.48

# PERCENT OF NEW YORK VISITORS BY REGION Exhibit 27



OHIO VISITORS TO GENESEE COUNTY

Table 25

<u>City</u>	<u>Percentage</u>
Columbus	7.8
Cleveland	0.7
Athens	0.5
Cincinnati	0.4
Youngstown	0.4
Akron	<u>0.1</u>
Total Percentage:	10.4%

The state of Ohio sent the second largest number of visitors to Genesee County (Table 25). Columbus was the source of the greatest number of visitors from the state, 7.8 percent. Other areas included: Cleveland, .7 percent; Youngstown and Athens both .5 percent; Cincinnati .4 percent; and Akron .1 percent. Interestingly, seventy-one percent of the respondents from Ohio primarily classified their party as immediate family traveling to Genesee County; 14.5 percent classified themselves as traveling alone.

Table 26 displays the top ten cities of origin of visitors to Genesee County, all of which were from New York with the exception of one city, Columbus, Ohio. As was stated earlier, the top two cities were from Western New York, Buffalo at 13.7 percent of all respondents and Rochester at 11.8 percent. City number three was Columbus, Ohio at 7.8 percent. The remainder of the top ten cities were also from New York. They were: Syracuse at 5.1 percent, Elmira at 4.0 percent, Binghamton at 3.6 percent, Utica at 2.5 percent, Hicksville at 2.3 percent and Albany at 2.1 percent. Poughkeepsie and Watertown tied for tenth place at 1.4 percent.

TOP 10 CITIES OF ORIGIN

Table 26

	Frequency	Percentage
Buffalo	100	13.7
Rochester	86	11.8
Columbus	57	7.8
Syracuse	37	5.1
Elmira	29	4.0
Binghamton	26	3.6
Utica	18	2.5
Hicksville	17	2.3
Albany	15	2.1
Poughkeepsie	10	1.4
Watertown	10	1.4

Figure 2 and 3 best summarize the origin of visitors to Genesee County in terms of spokes going to the hub. Major spokes were represented with heavier spoke arrows and minor spokes were represented with thinner spoke arrows. As you can see, the major spokes were coming from the following areas: each New York region (Figure 3), Ohio, Ontario, and Pennsylvania. Minor spokes were coming from Michigan, New Jersey, Connecticut, Illinois, North Carolina, and Massachusetts.

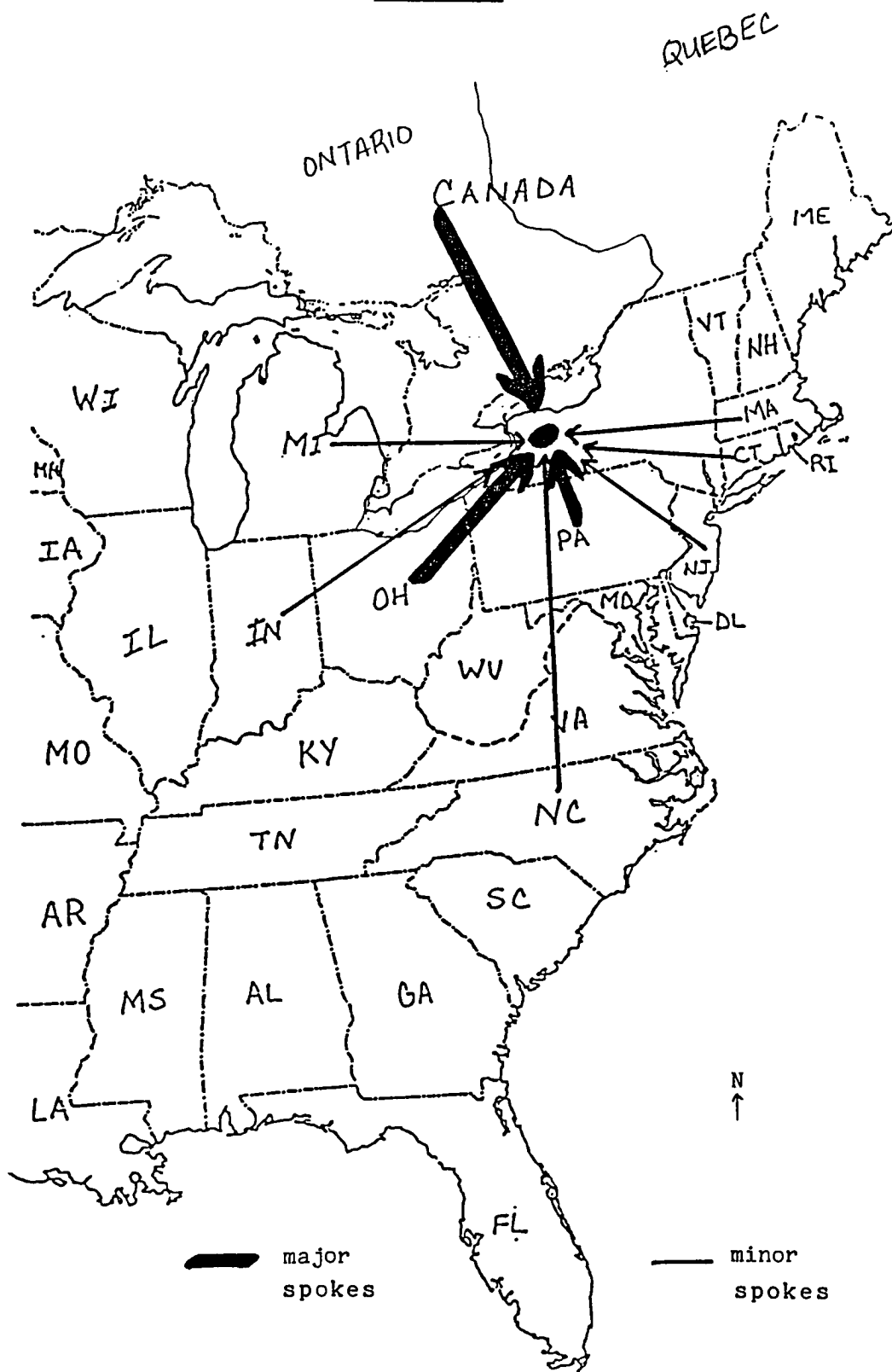
#### After Leaving Genesee County, Where Do the Visitors Go?

Tables 27, 28, Exhibit 28, and Figure 4 decipher where the visitors go after visiting Genesee County. Each was based on frequency analysis.

According to Table 27, 65.4 percent of the visitors to Genesee County described their stay as a primary destination. A very high percentage, 34.6 percent, described their stay as a stopover. Exhibit 28 represents those respondents who described their stay as a stopover, and indicated where the stopover visitors go after their stay in the County.

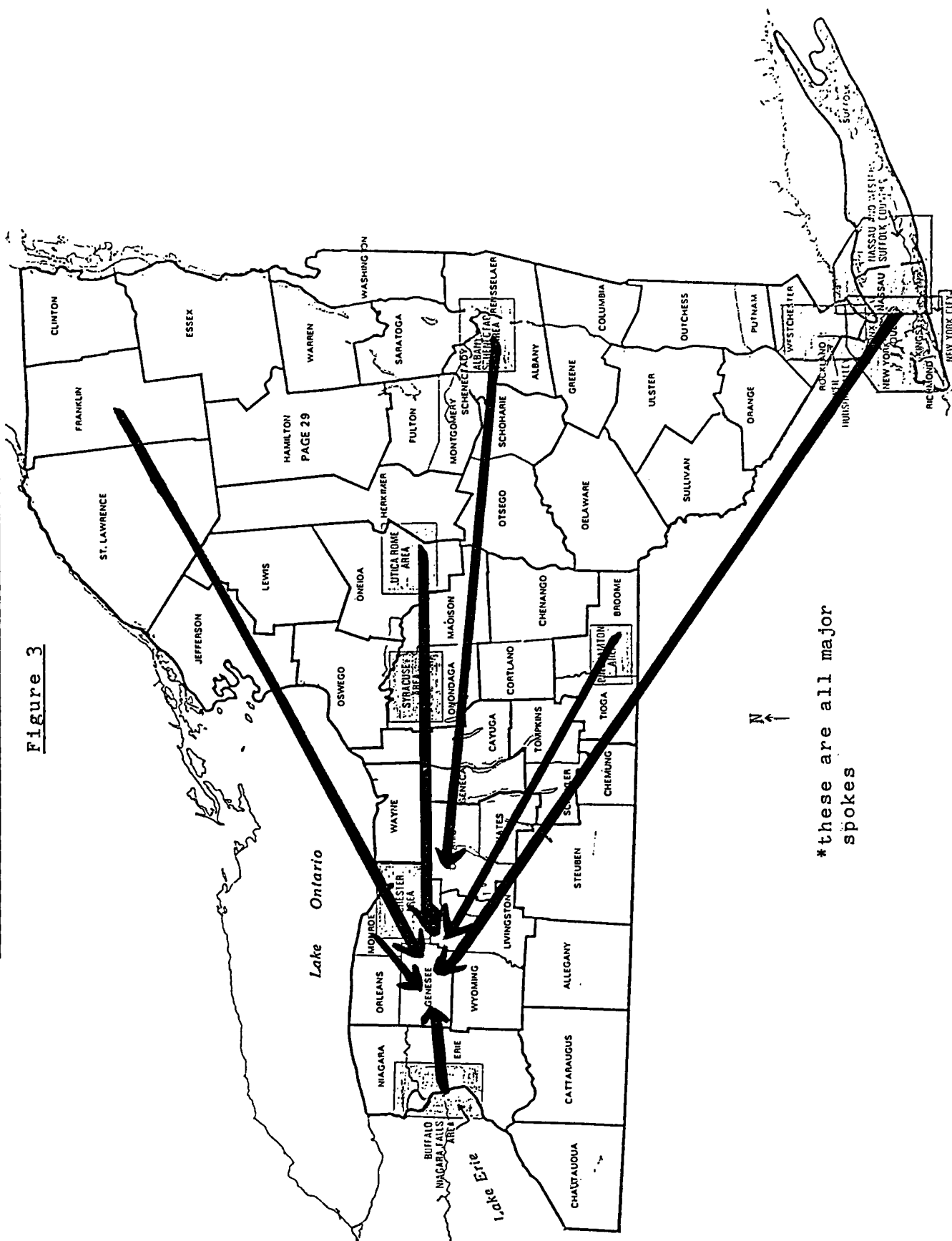
INCOMING UNITED STATES GENESEE COUNTY SPOKES

Figure 2



INCOMING NEW YORK GENESEE COUNTY SPOKES

Figure 3



WAS GENESEE COUNTY THE PRIMARY DESTINATION OR STOPOVER?

Table 27

	Frequency	Percentage
Primary Destination	467	65.4
Stopover	245	34.6

# PERCENT OF PRIMARY DESTINATION/STOPOVER AND THE DIRECTION OF STOPOVERS Exhibit 28

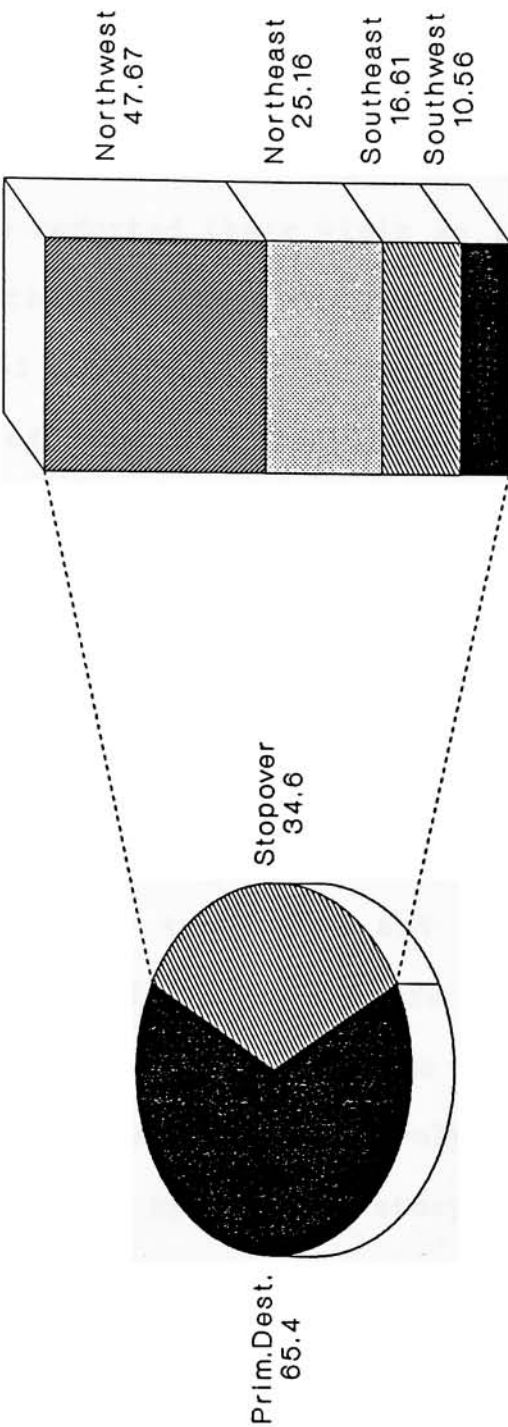


Exhibit 28 shows the largest percentage (47.67 percent) of stopover visitors went directly Northwest to the Buffalo/Niagara Falls Region. The Northeast, the Rochester/Canadaigua Region, was visited by 25.16 percent, making the North visited by a total of 72.83 percent of all those who reported their visit as a stopover. Those who traveled to the Southeast, the Letchworth/Geneva Region, represented 16.61 percent of the stopover respondents, and 10.56 percent of stopover respondents traveled to the Southwest, the Attica/East Aurora Region. The Southern region accounted for 27.17 percent of stopover respondents.

Table 28 further breaks down each region the stopover respondents traveled to. Of the Northwest, the Niagara Observation Towers and the Maid of the Mist were the two most popular attractions at twenty-two and 21.1 percent of all respondents respectively. The Niagara Falls Aquarium, Old Fort Niagara, and the Buffalo Zoo were also very popular at 11.4, 10.8, and 10.2 percent respectively. Other attractions visited include The Wax Museum of History, Naval Servicemen's Park, Iroquois Wildlife Refuge and the Artpark, Lewiston at 5.2, 4.7, 4.4, and 4.4 respectively.

IF STOPOVER, WHAT WAS PRIMARY DESTINATION?

Table 28

	Frequency	Percentage
<b>Northeast</b>		
Eastman Kodak Tours	72	9.9
G. Country Village Museum	79	10.8
Genesee River Gorge	74	10.2
Seneca House Museum	24	3.3
Seneca Park Zoo	45	6.2
Sonnenberg Gardens	45	6.2
George Eastman House	23	3.3
<b>Northwest</b>		
Artpark, Lewiston	32	4.4
Buffalo Zoo	74	10.2
Iroquois Wildlife Refuse	32	4.4
Maid of the Mist, N.F.	154	21.1
Naval Servicemen's Park	34	4.7
Niagara Observation Towers	160	22.0
Niagara Falls Aquarium	83	11.4
Old Fort Niagara	79	10.8
Wax Museum of History	38	5.2
<b>Southeast</b>		
Art Council Gallery	15	2.1
Balloons over Letchworth	33	4.5
Glenn Iris Inn	37	5.1
Letchworth State Park	117	16.0
Wyoming Gaslight Village	37	5.1
<b>Southwest</b>		
Attica Historical Museum	33	4.5
Bryncliff Resort	21	2.9
Attica Cider Mill (Fall)	56	7.7
Beaver Meadow Audubon Center	42	5.8

The Northeast's most popular attractions were the Genesee Country Village Museum and the Genesee River Gorge at 10.8 and 10.2 percent of all respondents respectively. The Eastman Kodak Tours were almost as popular at 9.9 percent. Seneca Park Zoo and Sonnenberg Gardens were tied at 6.2 percent, and the Seneca House Museum and the George Eastman House were tied at 3.3 percent.

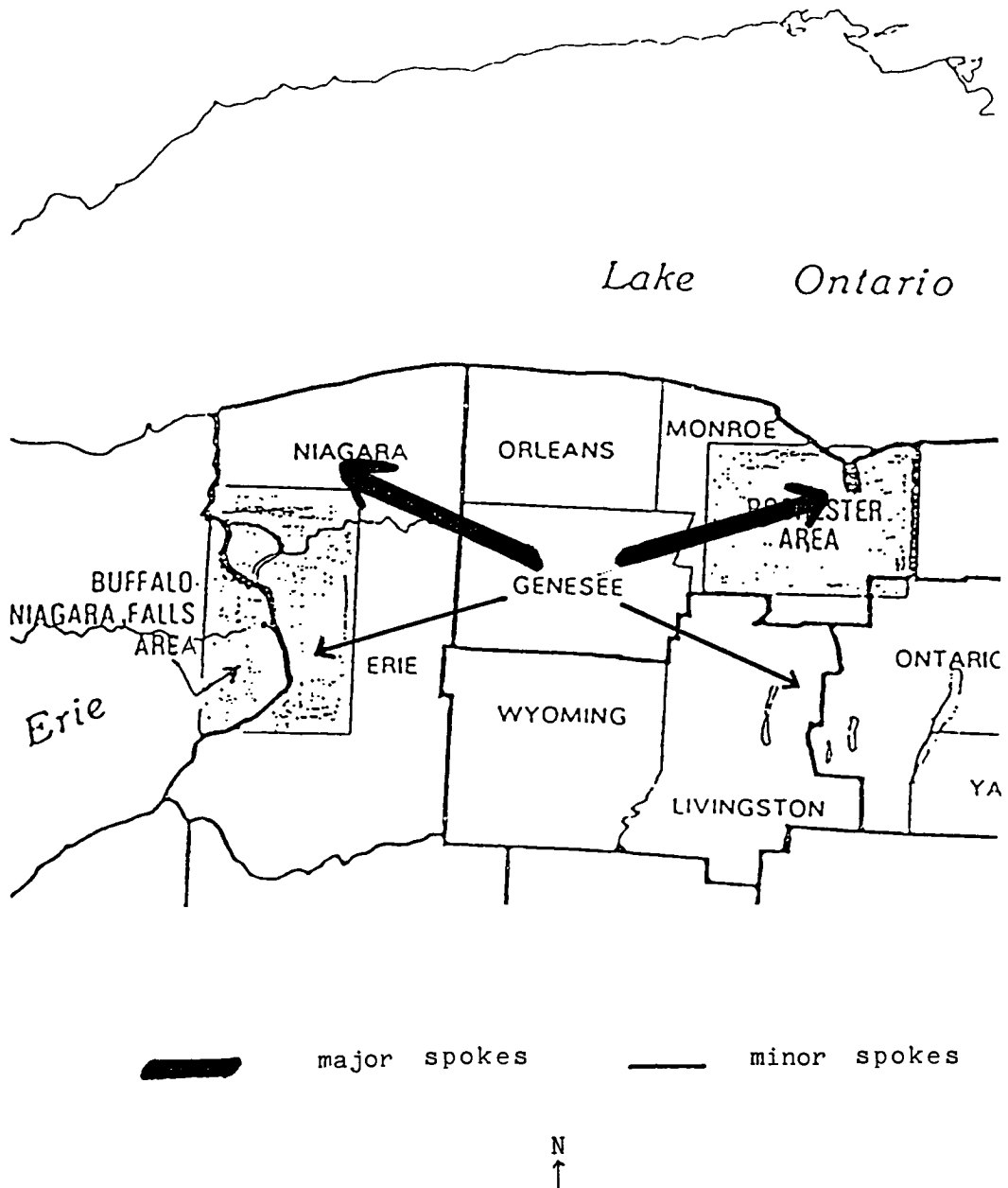
The Southeast was definitely known for its Letchworth State Park attraction, with sixteen percent of all respondents visiting there. The Glenn Iris Inn and Wyoming Gaslight Village were both visited by 5.1 percent of the visitors. Balloons over Letchworth and the Arts Council Gallery represented 4.5 and 2.1 percent respectively.

Finally, the Southwest's attractions were not as well known. They consisted of the Attica Cider Mill at 7.7 percent of all respondents, the Beaver Meadow Audubon Center at 5.8 percent, the Attica Historical Museum at 4.5 percent and the Byrnclyff Resort at 2.9 percent of the respondents.

Figure 4 best summarizes the positioning of visitors from Genesee County in terms of spokes going from the hub. Once again, the major spokes are represented with heavier spoke

OUTGOING GENESEE COUNTY SPOKES

Figure 4



arrows and minor spokes are represented with thinner spoke arrows. The major spokes were going out to the Northern regions while the minor spokes went towards the South.

By and large, visitors came from and went to the Western New York region, in particular, north of Genesee County. This was by far the strongest spoke of the hub. The advertising in this area is obviously working, and since it is so close to Genesee County, it seems safe to assume that word of mouth may also be the reason for such a strong and successful spoke.

## CHAPTER V

### CONCLUSIONS AND RECOMMENDATIONS

#### CONCLUSIONS

The purpose of this study was to first identify the tourist market of Genesee County in terms of its general demographic characteristics, awareness of area tourist attractions, and economic expenditures. Second, was to determine the spatial relationship to and from Genesee County as a "hub" destination.

This study was not an attempt to generate a statistical model where any host county or tourism agency could develop a strategic marketing plan to attract a certain tourist market to the given locale. Rather, it was an attempt to substantiate the economic and social importance of tourism planning to maximize tourism potential for Genesee County. It was suggested that through tourism planning and development Genesee County can be a tourismagnetic area, but it also heeded warning of the effects of overcommercialization.

The major findings of this study were the following:

1. The average visitor to Genesee County:
  - was married.
  - had no children.
  - resided in New York State.
  - was a professional.
  - had an annual household income between \$30,000 and \$40,000.
  - traveled to Genesee County as a primary destination.
  - traveled to Genesee County on a vacation.
  - stayed from one to three days.
  - stayed at a campground.
  - arrived to Genesee County by personal vehicle.
  - traveled with one other person or in a group of four.
  - traveled with his/her immediate family.
  - utilized a mailed request to obtain information on the area.
  - was aware of and visits/participates in:
    - \*Darien Lake Theme Park and Camping Resort
    - \*Outlet Factories
    - \*Camping Facilities

\*Historic Locations

\*Museums

- spent between \$16 and \$60 per day, per party on accommodations.
- spent between \$11 and \$20 per day, per person on food/meals.
- spent between \$6 and \$15 per day, per party on transportation.
- spent between \$6 and \$20 per day, per person on attractions/events.
- spent \$15 or less per day, per person on personal items.
- had visited Genesee County more than five times.
- rated his/her visits to Genesee County as an 8 on a scale of 1 to 10 (10 being highest).

2. With respect to market segment (type of party), it is important to know for tourism planning and development how each segment utilized attractions and events in Genesee County. Three groups, immediate family, group of friends, and group of relatives, tended to utilize the attractions/events of Genesee County quite similarly. They visited Darien Lake Theme Park and Camping Resort, and perhaps visited shopping facilities and/or historic locales. The business associates market segment was better acquainted with Genesee County and took part in more diverse activities. Those traveling alone tended to be more conservative, visiting only main-line attractions/events. Tour members, as expected, were somewhat channeled by the very structure of the tour itself, and hence made an impact on those attractions/events used within the tour package. The immediate family, group of friends, and group of relatives market segments made up 62.2 percent, 19.5 percent, and 5.2 percent of the total respondents respectively. The business associates market segment makes up 3.3 percent, those traveling alone made up 7.7 percent, and those traveling as a member of a tour made up 2.1 percent.

3. Using hub and spoke concept in Chapter II, Genesee County is the hub, the spokes of origin to the County mainly came from the following areas:

-New York	54.9
-Western N.Y.	25.5
-Southern Tier	8.4
-Central N.Y.	7.6
-Downstate N.Y.	7.4
-Capital District	4.2
-Upstate N.Y.	1.8
-Ohio	10.4
-Ontario, Canada	7.3
-Pennsylvania	5.9

The majority of visitors came from New York, Western New York in particular, and Ohio. Other strong spokes of origin were Ontario, Canada and Pennsylvania.

4. Once stopover visitors arrived in Genesee County, they proceeded towards the surrounding areas of the Northwest, Northeast, Southeast, and Southwest. Applying the hub and spoke concept of Chapter II, Genesee County is the hub and, relative to the County, the stopover outward spokes from Genesee County went to the following areas:

-Northwest	47.67
-Northeast	25.16
-Southeast	16.61
-Southwest	10.56

The Northwest was the most commonly used spoke outside of Genesee County. This area included the Niagara Falls and the Buffalo regions. The Northeast was also traveled to frequently from Genesee County. The Northeast included the Rochester and Canandaigua Regions. The Southeast, the Letchworth/Geneva regions and the Southwest, the Attica/East Aurora regions were not traveled to as frequently as the northern regions, and therefore were not very strong spokes from Genesee County.

5. Genesee County should continue to position itself as a hub in marketing. Stressed spokes should continue to be the Northwest and the Northeast, but the County should work on its positioning relating to the Southeast and Southwest. What is meant here is that the Southern attractions should be elaborated on/advertised more so visitors and potential visitors can envision the South as a valid spoke. A good example is Letchworth State Park in the Southeast. State parks attract many tourists, and the County should increase the public's knowledge of this major spoke attraction. This has the potential of attracting more visitors to Genesee County.

## RECOMMENDATIONS FOR FURTHER STUDY

1. It is suggested the study be repeated to ensure validity. Because tourism is somewhat seasonal, the study also needs to be done in the winter and spring, since this study was done in the summer and fall. Also, economic conditions can affect the expenditure outcomes. This study reflects the economy as it was in the summer and early fall of 1990.
2. Another suggestion is to send the letter of intent at least three weeks in advance to the county merchants. Then, follow up the letter with a second letter of intent or a phone call. It is important that the merchants be well informed before one attempts to obtain information such as guest registrations. It is also suggested that one has the support of the host county in the research process.
3. The questionnaire should be set up in a manner that is easy to read and understand for the respondents, yet easy to input into the SPSS-X program. Be sure to have as few fill-in questions as possible if the analysis requires crosstabulations. Set the choices for response up in

columns and number down the columns instead of across from column to column. This will make data entry much easier. To achieve a higher response rate, limit the number of questions to what is absolutely necessary.

4. Lastly, the need exists to follow through on steps 5 through 8 of the planning process explained in Chapter II. They basically consist of creating a plan and implementing it. In order to do this, the County must first make the commitment to tourism development. To be a success, the plan will need the most support from the agricultural community, as it is the County's largest industry. However, this may be difficult because the farmer's largest expense is their land and land taxes. As stated earlier, one of the disadvantages of tourism development is higher land taxes. Higher land taxes can be avoided, though, and it should be communicated to the agriculture industry. It is assumed that land taxes must go up to cover the increase in infrastructure and government in a tourism dominated area. This is not particularly true. First, there is no need to increase the government. Tourism development can prosper without any increase in the government body of the County. Second, the tourism industry itself will pay for the

increase in infrastructure through the increased tax revenues by more people spending in the County. The increase in revenues for the County can actually stabilize the property taxes and even lower them in the long run. This is of great importance to Genesee County's industry and the knowledge and understanding of it will give Genesee County the support it needs to make a commitment to tourism planning.

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## **APPENDIX A**

### **THE POTENTIAL, CURRENT, AND HISTORICAL MARKET SURVEYS**

(THE POTENTIAL MARKET SURVEY)

GENESEE COUNTY TOURISM SURVEY

In an attempt to better understand the needs of tourists visiting Genesee County, we ask that you take a few moments to complete this survey. Your input is of tremendous importance to the study. Please read each question carefully. Once again, thank you for your time on this very important matter.

- 1) Were you to travel to Genesee County, which of the following would best describe your party? (Select one)

- |  |   |
|--|---|
| 1) <input type="checkbox"/> immediate family | 4) <input type="checkbox"/> group of relatives  |
| 2) <input type="checkbox"/> group of friends | 5) <input type="checkbox"/> business associates |
| 3) <input type="checkbox"/> tour member      | 6) <input type="checkbox"/> traveling alone     |

- 2) How many persons, including yourself, make up the party you selected in Question 1?

\_\_\_\_\_

- 3) In what city, state or province do you live?

\_\_\_\_\_  
(City) (State or Province) (Zip code)

- 4) What is your marital status?

- |                                      |                                       |                                     |
|--------------------------------------|---------------------------------------|-------------------------------------|
| 1) <input type="checkbox"/> single   | 3) <input type="checkbox"/> separated | 5) <input type="checkbox"/> married |
| 2) <input type="checkbox"/> divorced | 4) <input type="checkbox"/> widowed   |                                     |

- 5) How many children do you have?

- |                                  |                                   |  |
|----------------------------------|-----------------------------------|--|
| 1) <input type="checkbox"/> none | 4) <input type="checkbox"/> three | 7) <input type="checkbox"/> more than five |
| 2) <input type="checkbox"/> one  | 5) <input type="checkbox"/> four  |  |
| 3) <input type="checkbox"/> two  | 6) <input type="checkbox"/> five  |  |

- 6) Which of the following best describes your occupation? (Select only one)

- |  |  |
|--|--|
| 1) <input type="checkbox"/> professional/technical | 10) <input type="checkbox"/> craftsman     |
| 2) <input type="checkbox"/> manager/administration | 11) <input type="checkbox"/> self-employed |
| 3) <input type="checkbox"/> agriculture            | 12) <input type="checkbox"/> sales work    |
| 4) <input type="checkbox"/> manufacturing          | 13) <input type="checkbox"/> government    |
| 5) <input type="checkbox"/> student                | 14) <input type="checkbox"/> retired       |
| 6) <input type="checkbox"/> transportation         | 15) <input type="checkbox"/> clerical      |
| 7) <input type="checkbox"/> retail                 | 16) <input type="checkbox"/> not employed  |
| 8) <input type="checkbox"/> medical                | 17) <input type="checkbox"/> law           |
| 9) <input type="checkbox"/> engineering            | 18) <input type="checkbox"/> other, please |

specify: \_\_\_\_\_

\_\_\_\_\_.

- 7) What might be the main purpose of your stay in Genesee County? (Select one)

- |   |   |
|---|---|
| 1) <input type="checkbox"/> vacation                    | 4) <input type="checkbox"/> visit friend/relative |
| 2) <input type="checkbox"/> business                    | 5) <input type="checkbox"/> a specific event      |
| 3) <input type="checkbox"/> other please specify: _____ |   |

PLEASE TURN THE PAGE

- 8) What might be your intended length of stay in Genesee County? (Select one)
- |                             |                      |
|-----------------------------|----------------------|
| 1) _____ less than 1 day    | 4) _____ 1 to 3 days |
| 2) _____ 3 to 5 days        | 5) _____ 5 to 7 days |
| 3) _____ more than one week |                      |

- 9) Genesee County would be your:
- |                              |                   |
|------------------------------|-------------------|
| 1) _____ primary destination | 2) _____ stopover |
|------------------------------|-------------------|

If it will be a stopover, what might be your primary destination?

**In Northeast:**

- |  |                                       |
|--|---------------------------------------|
| 1) _____ Eastman Kodak Tours               | 5) _____ Seneca Park Zoo              |
| 2) _____ Genesee Country Village<br>Museum | 6) _____ Sonnenberg Gardens<br>Museum |
| 3) _____ Genesee River Gorge               | 7) _____ Genesee Eastman House        |
| 4) _____ Seneca House Museum               |                                       |

**In Northwest:**

- |   |  |
|---|--|
| 1) _____ Artpark, Lewiston              | 6) _____ Niagara Falls Observation Tower |
| 2) _____ Buffalo Zoo                    | 7) _____ Niagara Falls Aquarium          |
| 3) _____ Iroquois Wildlife Refuge       | 8) _____ Old Fort Niagara                |
| 4) _____ Maid of the Mist, Niagara Fall | 9) _____ The Wax Museum of History       |
| 5) _____ Naval Servicemen's Park        |  |

**In Southeast:**

- |                                      |  |
|--------------------------------------|--|
| 1) _____ Arts Council Gallery, Perry | 4) _____ Letchworth State Park               |
| 2) _____ Balloons Over Letchworth    | 5) _____ Wyoming Gaslight Village<br>Complex |
| 3) _____ Glenn Iris Inn, Letchworth  |  |

**In Southwest:**

- |  |  |
|--|--|
| 1) _____ Attica Historical Society<br>Museum | 3) _____ Attica Cider Mill<br>(fall)           |
| 2) _____ Byrnclyff Resort, Varysburg         | 4) _____ Beaver Meadow Audubon<br>Center, Java |

- 10) What might be your accommodations in Genesee County? (Select one)
- |  |                         |
|--|-------------------------|
| 1) _____ campgrounds                   | 4) _____ hotel/motel    |
| 2) _____ bed & breakfast               | 5) _____ family/friends |
| 3) _____ not staying in Genesee County |                         |

**PLEASE TURN THE PAGE**

11) What means of transportation would you use to reach Genesee County?

(Select as many that apply)

- |  |  |
|--|--|
| 1) <input type="checkbox"/> personal vehicle | 4) <input type="checkbox"/> rental vehicle |
| 2) <input type="checkbox"/> bus              | 5) <input type="checkbox"/> train          |
| 3) <input type="checkbox"/> airplane         |  |

12) What sources did you use to get information on Genesee County?

(Select as many that apply)

- |  |   |
|--|---|
| 1) <input type="checkbox"/> mailed request               | 6) <input type="checkbox"/> friends/relatives |
| 2) <input type="checkbox"/> magazine/brochure            | 7) <input type="checkbox"/> travel agent      |
| 3) <input type="checkbox"/> information booth            | 8) <input type="checkbox"/> automobile club   |
| 4) <input type="checkbox"/> Genesee County Travel Guide  | 9) <input type="checkbox"/> no sources used   |
| 5) <input type="checkbox"/> other, please specify: _____ |   |
- 

13) Which of the following attractions are you aware of in Genesee County?

(Select as many that apply)

- |   |   |
|---|---|
| 1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort | 11) <input type="checkbox"/> Museums                    |
| 2) <input type="checkbox"/> Farmers Market                            | 12) <input type="checkbox"/> Genesee County Fairgrounds |
| 3) <input type="checkbox"/> Camping                                   | 13) <input type="checkbox"/> Genesee County Park        |
| 4) <input type="checkbox"/> Outlet Factories                          | 14) <input type="checkbox"/> Genesee Symphony           |
| 5) <input type="checkbox"/> Genesee Country Mall                      | 15) <input type="checkbox"/> Cross Country Skiing       |
| 6) <input type="checkbox"/> Golf                                      | 16) <input type="checkbox"/> Snowmobile Trails          |
| 7) <input type="checkbox"/> Historic Locations                        | 17) <input type="checkbox"/> Fishing                    |
| 8) <input type="checkbox"/> Harness Racing                            | 18) <input type="checkbox"/> Hunting                    |
| 9) <input type="checkbox"/> Primeval Bergen Swamp Trails              | 19) <input type="checkbox"/> Professional Baseball      |
| 10) <input type="checkbox"/> Other, please specify: _____             | 20) <input type="checkbox"/> Antique Shops              |
- 

14) Which of those attractions might you visit while in Genesee County?

(Select as many that apply)

- |   |   |
|---|---|
| 1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort | 11) <input type="checkbox"/> Museums                      |
| 2) <input type="checkbox"/> Farmers Market                            | 12) <input type="checkbox"/> Genesee County Fairgrounds   |
| 3) <input type="checkbox"/> Camping                                   | 13) <input type="checkbox"/> Genesee County Park          |
| 4) <input type="checkbox"/> Outlet Factories                          | 14) <input type="checkbox"/> Genesee Symphony             |
| 5) <input type="checkbox"/> Genesee County Mall                       | 15) <input type="checkbox"/> Cross Country Skiing         |
| 6) <input type="checkbox"/> Golf                                      | 16) <input type="checkbox"/> Snowmobile Trails            |
| 7) <input type="checkbox"/> Historic Locations                        | 17) <input type="checkbox"/> Fishing                      |
| 8) <input type="checkbox"/> Harness Racing                            | 18) <input type="checkbox"/> Hunting                      |
| 10) <input type="checkbox"/> Primeval Bergen Swamp Trails             | 19) <input type="checkbox"/> Professional Baseball        |
|   | 20) <input type="checkbox"/> Other, please specify: _____ |
- 

PLEASE TURN THE PAGE

- 15) What is your annual household income? (In U.S. Dollars)
- |                               |                               |
|-------------------------------|-------------------------------|
| 1) _____ under \$20,000       | 5) _____ \$50,001 to \$60,000 |
| 2) _____ \$20,001 to \$30,000 | 6) _____ \$60,001 to \$70,000 |
| 3) _____ \$30,001 to \$40,000 | 7) _____ \$70,001 to \$80,000 |
| 4) _____ \$40,001 to \$50,000 | 8) _____ over \$80,001        |
- 16) When travelling, what is your anticipated budget (in U.S) Dollars) for accommodations (Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...) per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$15                         | 4) _____ \$31 to \$45 | 6) _____ \$61 to \$75   |
| 2) _____ \$16 to \$30                           | 5) _____ \$46 to \$60 | 7) _____ more than \$76 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 17) When travelling, what is your anticipated budget (In U.S. Dollars) for food/meals per person, per day in Genesee County?
- |                        |                       |                         |
|------------------------|-----------------------|-------------------------|
| 1) _____ less than \$5 | 3) _____ \$11 to \$15 | 5) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10   | 4) _____ \$16 to \$20 | 6) _____ more than \$25 |
- 18) When travelling, what is your anticipated budget (in U.S. Dollars) for transportation (includes gas, tolls, etc.), per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 19) When travelling, what is your anticipated budget (In U.S. Dollars) for attractions and events (includes entrance fees, charter fees, licensing fees, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 20) When travelling, what is your anticipated budget (In U.S. Dollars) for personal items (includes souvenirs, sundries, recreation equipment, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |

**THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY**

(THE CURRENT MARKET SURVEY)

WELCOME TO GENESEE COUNTY!!!

In an attempt to better understand the needs of tourists visiting Genesee County, the Genesee County Chamber of Commerce, Inc. cordially asks you to take a few minutes of your time to complete this survey. Your response will help them assure they will be offering the services necessary to make your future visits to Genesee County satisfying and worthwhile experiences. We guarantee all the information will be held in the strictest of confidence.

Please read and answer every question carefully. The survey should be returned to the registration location, as soon as possible. Once again, thank you for your time on this very important matter.

- 1) Which of the following best describes your party? (Select one)
  - 1) ☐ immediate family
  - 2) ☐ group of friends
  - 3) ☐ tour member
  - 4) ☐ group of relatives
  - 5) ☐ business associates
  - 6) ☐ traveling alone
- 2) How many persons, including yourself, make up the party you selected in Question 1?  
\_\_\_\_\_
- 3) In what city, state or province do you live?  

(City)	(State or Province)	(Zip code)
- 4) What is your marital status?
  - 1) ☐ single
  - 2) ☐ divorced
  - 3) ☐ separated
  - 4) ☐ widowed
  - 5) ☐ married
- 5) How many children do you have?
  - 1) ☐ none
  - 2) ☐ one
  - 3) ☐ two
  - 4) ☐ three
  - 5) ☐ four
  - 6) ☐ five
  - 7) ☐ more than five
- 6) Which of the following best describes your occupation? (Select only one)
  - 1) ☐ professional/technical
  - 2) ☐ manager/administration
  - 3) ☐ agriculture
  - 4) ☐ manufacturing
  - 5) ☐ student
  - 6) ☐ transportation
  - 7) ☐ retail
  - 8) ☐ medical
  - 9) ☐ engineering
  - 10) ☐ craftsman
  - 11) ☐ self-employed
  - 12) ☐ sales work
  - 13) ☐ government
  - 14) ☐ retired
  - 15) ☐ clerical
  - 16) ☐ not employed
  - 17) ☐ law
  - 18) ☐ other, please specify: \_\_\_\_\_

PLEASE TURN THE PAGE

- 7) What is the main purpose of your stay in Genesee County? (Select one)
- |  |   |
|--|---|
| 1) <input type="checkbox"/> vacation                     | 4) <input type="checkbox"/> visit friend/relative |
| 2) <input type="checkbox"/> business                     | 5) <input type="checkbox"/> a specific event      |
| 3) <input type="checkbox"/> other please specify: _____. |   |

- 8) What is your intended length of stay in Genesee County? (Select one)
- |  |   |
|--|---|
| 1) <input type="checkbox"/> less than 1 day    | 4) <input type="checkbox"/> 1 to 3 days |
| 2) <input type="checkbox"/> 3 to 5 days        | 5) <input type="checkbox"/> 5 to 7 days |
| 3) <input type="checkbox"/> more than one week |   |

- 9) Is Genesee County your:
- |   |                                      |
|---|--------------------------------------|
| 1) <input type="checkbox"/> primary destination | 2) <input type="checkbox"/> stopover |
|---|--------------------------------------|

If it is be a stopover, what is your primary destination?

**In Northeast:**

- |   |  |
|---|--|
| 1) <input type="checkbox"/> Eastman Kodak Tours               | 5) <input type="checkbox"/> Seneca Park Zoo              |
| 2) <input type="checkbox"/> Genesee Country Village<br>Museum | 6) <input type="checkbox"/> Sonnenberg Gardens<br>Museum |
| 3) <input type="checkbox"/> Genesee River Gorge               | 7) <input type="checkbox"/> Genesee Eastman House        |
| 4) <input type="checkbox"/> Seneca House Museum               |  |

**In Northwest:**

- |  |   |
|--|---|
| 1) <input type="checkbox"/> Artpark, Lewiston              | 6) <input type="checkbox"/> Niagara Falls Observation Tower |
| 2) <input type="checkbox"/> Buffalo Zoo                    | 7) <input type="checkbox"/> Niagara Falls Aquarium          |
| 3) <input type="checkbox"/> Iroquois Wildlife Refuge       | 8) <input type="checkbox"/> Old Fort Niagara                |
| 4) <input type="checkbox"/> Maid of the Mist, Niagara Fall | 9) <input type="checkbox"/> The Wax Museum of History       |
| 5) <input type="checkbox"/> Naval Servicemen's Park        |   |

**In Southeast:**

- |   |   |
|---|---|
| 1) <input type="checkbox"/> Arts Council Gallery, Perry | 4) <input type="checkbox"/> Letchworth State Park               |
| 2) <input type="checkbox"/> Balloons Over Letchworth    | 5) <input type="checkbox"/> Wyoming Gaslight Village<br>Complex |
| 3) <input type="checkbox"/> Glenn Iris Inn, Letchworth  |   |

**In Southwest:**

- |   |   |
|---|---|
| 1) <input type="checkbox"/> Attica Historical Society<br>Museum | 3) <input type="checkbox"/> Attica Cider Mill<br>(fall)           |
| 2) <input type="checkbox"/> Byrnclyff Resort, Varysburg         | 4) <input type="checkbox"/> Beaver Meadow Audubon<br>Center, Java |

- 10) What are your accommodations in Genesee County? (Select one)
- |   |  |
|---|--|
| 1) <input type="checkbox"/> campgrounds                   | 4) <input type="checkbox"/> hotel/motel    |
| 2) <input type="checkbox"/> bed & breakfast               | 5) <input type="checkbox"/> family/friends |
| 3) <input type="checkbox"/> not staying in Genesee County |  |

**PLEASE TURN THE PAGE**

- 11) What means of transportation did you use to reach Genesee County?  
(Select as many that apply)

1) ☐ personal vehicle                      4) ☐ rental vehicle  
2) ☐ bus                                      5) ☐ train  
3) ☐ airplane

- 12) What sources did you use to get information on Genesee County?  
(Select as many that apply)

1) ☐ mailed request                      6) ☐ friends/relatives  
2) ☐ magazine/brochure              7) ☐ travel agent  
3) ☐ information booth                8) ☐ automobile club  
4) ☐ Genesee County Travel Guide    9) ☐ no sources used  
5) ☐ other, please specify: \_\_\_\_\_

- 13) Which of the following attractions are you aware of in Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort	11) <input type="checkbox"/> Museums
2) <input type="checkbox"/> Farmers Market	12) <input type="checkbox"/> Genesee County Fair- grounds
3) <input type="checkbox"/> Camping	13) <input type="checkbox"/> Genesee County Park
4) <input type="checkbox"/> Outlet Factories	14) <input type="checkbox"/> Genesee Symphony
5) <input type="checkbox"/> Genesee Country Mall	15) <input type="checkbox"/> Cross Country Skiing
6) <input type="checkbox"/> Golf	16) <input type="checkbox"/> Snowmobile Trails
7) <input type="checkbox"/> Historic Locations	17) <input type="checkbox"/> Fishing
8) <input type="checkbox"/> Harness Racing	18) <input type="checkbox"/> Hunting
9) <input type="checkbox"/> Primeval Bergen Swamp Trails	19) <input type="checkbox"/> Professional Baseball
10) <input type="checkbox"/> Other, please specify: _____	20) <input type="checkbox"/> Antique Shops

- 14) Which of those attractions have you or will you visit while in Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort	11) <input type="checkbox"/> Museums
2) <input type="checkbox"/> Farmers Market	12) <input type="checkbox"/> Genesee County Fair- grounds
3) <input type="checkbox"/> Camping	13) <input type="checkbox"/> Genesee County Park
4) <input type="checkbox"/> Outlet Factories	14) <input type="checkbox"/> Genesee Symphony
5) <input type="checkbox"/> Genesee County Mall	15) <input type="checkbox"/> Cross Country Skiing
6) <input type="checkbox"/> Golf	16) <input type="checkbox"/> Snowmobile Trails
7) <input type="checkbox"/> Historic Locations	17) <input type="checkbox"/> Fishing
8) <input type="checkbox"/> Harness Racing	18) <input type="checkbox"/> Hunting
9) <input type="checkbox"/> Primeval Bergen Swamp Trails	19) <input type="checkbox"/> Professional Baseball
	20) <input type="checkbox"/> Other, please specify: _____

---

PLEASE TURN THE PAGE

- 15) What is your annual household income? (In U.S. Dollars)
- |                               |                               |
|-------------------------------|-------------------------------|
| 1) _____ under \$20,000       | 5) _____ \$50,001 to \$60,000 |
| 2) _____ \$20,001 to \$30,000 | 6) _____ \$60,001 to \$70,000 |
| 3) _____ \$30,001 to \$40,000 | 7) _____ \$70,001 to \$80,000 |
| 4) _____ \$40,001 to \$50,000 | 8) _____ over \$80,001        |
- 16) What is your expected budget (in U.S. Dollars) for accommodations (Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...) per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$15                         | 4) _____ \$31 to \$45 | 6) _____ \$61 to \$75   |
| 2) _____ \$16 to \$30                           | 5) _____ \$46 to \$60 | 7) _____ more than \$76 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 17) What is your expected budget (In U.S. Dollars) for food/meals per person, per day in Genesee County?
- |                        |                       |                         |
|------------------------|-----------------------|-------------------------|
| 1) _____ less than \$5 | 3) _____ \$11 to \$15 | 5) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10   | 4) _____ \$16 to \$20 | 6) _____ more than \$25 |
- 18) What is your expected budget (in U.S. Dollars) for transportation (includes gas, tolls, etc.), per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 19) What is your expected budget (In U.S. Dollars) for attractions and events (includes entrance fees, charter fees, licensing fees, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 20) What is your expected budget (In U.S. Dollars) for personal items (includes souvenirs, sundries, recreation equipment, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 21) On a scale of 1 to 10, please rate your overall satisfaction with your stay in Genesee County. (One being the lowest possible score, ten being the highest.)
- \_\_\_\_\_
- 22) Including this stay, how many times have you visited Genesee County? \_\_\_\_\_

**THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY**

(THE HISTORICAL MARKET SURVEY)

GENESEE COUNTY TOURISM SURVEY

In an attempt to better understand the needs of tourists visiting Genesee County, we ask that you take a few moments to complete this survey. Your input is of tremendous importance to the study. Please read each question carefully. Once again, thank you for your time on this very important matter.

- 1) Which of the following best described your party? (Select one)
  - 1) \_\_\_\_\_ immediate family
  - 2) \_\_\_\_\_ group of friends
  - 3) \_\_\_\_\_ tour member
  - 4) \_\_\_\_\_ group of relatives
  - 5) \_\_\_\_\_ business associates
  - 6) \_\_\_\_\_ traveling alone
- 2) How many persons, including yourself, make up the party you selected in Question 1?  
\_\_\_\_\_
- 3) In what city, state or province do you live?  

(City)	(State or Province)	(Zip code)
--------	---------------------	------------
- 4) What is your marital status?
  - 1) \_\_\_\_\_ single
  - 2) \_\_\_\_\_ divorced
  - 3) \_\_\_\_\_ separated
  - 4) \_\_\_\_\_ widowed
  - 5) \_\_\_\_\_ married
- 5) How many children do you have?
  - 1) \_\_\_\_\_ none
  - 2) \_\_\_\_\_ one
  - 3) \_\_\_\_\_ two
  - 4) \_\_\_\_\_ three
  - 5) \_\_\_\_\_ four
  - 6) \_\_\_\_\_ five
  - 7) \_\_\_\_\_ more than five
- 6) Which of the following best describes your occupation? (Select only one)
  - 1) \_\_\_\_\_ professional/technical
  - 2) \_\_\_\_\_ manager/administration
  - 3) \_\_\_\_\_ agriculture
  - 4) \_\_\_\_\_ manufacturing
  - 5) \_\_\_\_\_ student
  - 6) \_\_\_\_\_ transportation
  - 7) \_\_\_\_\_ retail
  - 8) \_\_\_\_\_ medical
  - 9) \_\_\_\_\_ engineering
  - 10) \_\_\_\_\_ craftsman
  - 11) \_\_\_\_\_ self-employed
  - 12) \_\_\_\_\_ sales work
  - 13) \_\_\_\_\_ government
  - 14) \_\_\_\_\_ retired
  - 15) \_\_\_\_\_ clerical
  - 16) \_\_\_\_\_ not employed
  - 17) \_\_\_\_\_ law
  - 18) \_\_\_\_\_ other, please specify: \_\_\_\_\_
- 7) What was the main purpose of your stay in Genesee County? (Select one)
  - 1) \_\_\_\_\_ vacation
  - 2) \_\_\_\_\_ business
  - 3) \_\_\_\_\_ other please specify: \_\_\_\_\_
  - 4) \_\_\_\_\_ visit friend/relative
  - 5) \_\_\_\_\_ a specific event

PLEASE TURN THE PAGE

8) What was your length of stay in Genesee County? (Select one)

- |                             |                      |
|-----------------------------|----------------------|
| 1) _____ less than 1 day    | 4) _____ 1 to 3 days |
| 2) _____ 3 to 5 days        | 5) _____ 5 to 7 days |
| 3) _____ more than one week |                      |

9) Was Genesee County a:

- |                              |                   |
|------------------------------|-------------------|
| 1) _____ primary destination | 2) _____ stopover |
|------------------------------|-------------------|

If it was be a stopover, what was your primary destination?

**In Northeast:**

- |  |                                       |
|--|---------------------------------------|
| 1) _____ Eastman Kodak Tours               | 5) _____ Seneca Park Zoo              |
| 2) _____ Genesee Country Village<br>Museum | 6) _____ Sonnenberg Gardens<br>Museum |
| 3) _____ Genesee River Gorge               | 7) _____ Genesee Eastman House        |
| 4) _____ Seneca House Museum               |                                       |

**In Northwest:**

- |   |  |
|---|--|
| 1) _____ Artpark, Lewiston              | 6) _____ Niagara Falls Observation Tower |
| 2) _____ Buffalo Zoo                    | 7) _____ Niagara Falls Aquarium          |
| 3) _____ Iroquois Wildlife Refuge       | 8) _____ Old Fort Niagara                |
| 4) _____ Maid of the Mist, Niagara Fall | 9) _____ The Wax Museum of History       |
| 5) _____ Naval Servicemen's Park        |  |

**In Southeast:**

- |                                      |  |
|--------------------------------------|--|
| 1) _____ Arts Council Gallery, Perry | 4) _____ Letchworth State Park               |
| 2) _____ Balloons Over Letchworth    | 5) _____ Wyoming Gaslight Village<br>Complex |
| 3) _____ Glenn Iris Inn, Letchworth  |  |

**In Southwest:**

- |  |  |
|--|--|
| 1) _____ Attica Historical Society<br>Museum | 3) _____ Attica Cider Mill<br>(fall)           |
| 2) _____ Byrnclyff Resort, Varysburg         | 4) _____ Beaver Meadow Audubon<br>Center, Java |

10) What were your accommodations in Genesee County? (Select one)

- |  |                         |
|--|-------------------------|
| 1) _____ campgrounds                   | 4) _____ hotel/motel    |
| 2) _____ bed & breakfast               | 5) _____ family/friends |
| 3) _____ not staying in Genesee County |                         |

**PLEASE TURN THE PAGE**

- 11) What means of transportation did you use to reach Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> personal vehicle	4) <input type="checkbox"/> rental vehicle
2) <input type="checkbox"/> bus	5) <input type="checkbox"/> train
3) <input type="checkbox"/> airplane	

- 12) What sources did you use to get information on Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> mailed request	6) <input type="checkbox"/> friends/relatives
2) <input type="checkbox"/> magazine/brochure	7) <input type="checkbox"/> travel agent
3) <input type="checkbox"/> information booth	8) <input type="checkbox"/> automobile club
4) <input type="checkbox"/> Genesee County Travel Guide	9) <input type="checkbox"/> no sources used
5) <input type="checkbox"/> other, please specify: _____	

---

- 13) Which of the following attractions are you aware of in Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort	11) <input type="checkbox"/> Museums
2) <input type="checkbox"/> Farmers Market	12) <input type="checkbox"/> Genesee County Fair-grounds
3) <input type="checkbox"/> Camping	13) <input type="checkbox"/> Genesee County Park
4) <input type="checkbox"/> Outlet Factories	14) <input type="checkbox"/> Genesee Symphony
5) <input type="checkbox"/> Genesee Country Mall	15) <input type="checkbox"/> Cross Country Skiing
6) <input type="checkbox"/> Golf	16) <input type="checkbox"/> Snowmobile Trails
7) <input type="checkbox"/> Historic Locations	17) <input type="checkbox"/> Fishing
8) <input type="checkbox"/> Harness Racing	18) <input type="checkbox"/> Hunting
9) <input type="checkbox"/> Primeval Bergen Swamp Trails	19) <input type="checkbox"/> Professional Baseball
10) <input type="checkbox"/> Other, please specify: _____	20) <input type="checkbox"/> Antique Shops

---

- 14) Which of those attractions did you visit while in Genesee County?  
(Select as many that apply)

1) <input type="checkbox"/> Darien Lake Theme Park and Camping Resort	11) <input type="checkbox"/> Museums
2) <input type="checkbox"/> Farmers Market	12) <input type="checkbox"/> Genesee County Fair-grounds
3) <input type="checkbox"/> Camping	13) <input type="checkbox"/> Genesee County Park
4) <input type="checkbox"/> Outlet Factories	14) <input type="checkbox"/> Genesee Symphony
5) <input type="checkbox"/> Genesee County Mall	15) <input type="checkbox"/> Cross Country Skiing
6) <input type="checkbox"/> Golf	16) <input type="checkbox"/> Snowmobile Trails
7) <input type="checkbox"/> Historic Locations	17) <input type="checkbox"/> Fishing
8) <input type="checkbox"/> Harness Racing	18) <input type="checkbox"/> Hunting
10) <input type="checkbox"/> Primeval Bergen Swamp Trails	19) <input type="checkbox"/> Professional Baseball
	20) <input type="checkbox"/> Other, please specify: _____

---

PLEASE TURN THE PAGE

- 15) What is your annual household income? (In U.S. Dollars)
- |                               |                               |
|-------------------------------|-------------------------------|
| 1) _____ under \$20,000       | 5) _____ \$50,001 to \$60,000 |
| 2) _____ \$20,001 to \$30,000 | 6) _____ \$60,001 to \$70,000 |
| 3) _____ \$30,001 to \$40,000 | 7) _____ \$70,001 to \$80,000 |
| 4) _____ \$40,001 to \$50,000 | 8) _____ over \$80,001        |
- 16) What was your expense (in U.S) Dollars) for accommodations (Campgrounds, Bed & Breakfasts, Hotel, Motel, etc...) per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$15                         | 4) _____ \$31 to \$45 | 6) _____ \$61 to \$75   |
| 2) _____ \$16 to \$30                           | 5) _____ \$46 to \$60 | 7) _____ more than \$76 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 17) What was your expense (In U.S. Dollars) for food/meals per person, per day in Genesee County?
- |                        |                       |                         |
|------------------------|-----------------------|-------------------------|
| 1) _____ less than \$5 | 3) _____ \$11 to \$15 | 5) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10   | 4) _____ \$16 to \$20 | 6) _____ more than \$25 |
- 18) What was your expense (in U.S. Dollars) for transportation (includes gas, tolls, etc.), per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 19) What was your expense (In U.S. Dollars) for attractions and events (includes entrance fees, charter fees, licensing fees, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 20) What was your expense (In U.S. Dollars) for personal items (includes souvenirs, sundries, recreation equipment, etc.), per person, per day in Genesee County?
- |   |                       |                         |
|---|-----------------------|-------------------------|
| 1) _____ less than \$5                          | 4) _____ \$11 to \$15 | 6) _____ \$21 to \$25   |
| 2) _____ \$6 to \$10                            | 5) _____ \$16 to \$20 | 7) _____ more than \$25 |
| 3) _____ [if on a tour, included in tour price] |                       |                         |
- 21) On a scale of 1 to 10, please rate your overall satisfaction with your stay in Genesee County. (One being the lowest possible score, ten being the highest.)
- \_\_\_\_\_
- 22) How many times have you visited Genesee County? \_\_\_\_\_

**THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY**

## **APPENDIX B**

### **THE POTENTIAL AND HISTORICAL MARKET COVER LETTERS**

THE POTENTIAL MARKET'S

FIRST COVER LETTER

July 27, 1990

Dear Visitor:

You have been selected to participate in this study, along with several hundred other potential visitors, because you have requested information about Genesee County.

If you did not visit Genesee County, we ask that you take a few minutes of your time to complete the survey. Please return it by week's end in the self addressed, stamped envelope to Rochester Institute of Technology who is conducting this research for Genesee County Chamber of Commerce, Inc. We guarantee all the information will be held in the strictest of confidence.

The results of the survey will help us make your future visits to Genesee County satisfying and worthwhile experiences.

If you did visit Genesee County, please return this cover letter and check "Did Visit" at the bottom of the page. Please feel free to make any comments regarding your visit to Genesee County on the back of this letter.

Should you have any questions, please contact Genesee County's Chamber of Commerce at (716) 343-7440. Thank you.

Rita R. Zeitlin  
Genesee County Chamber  
of Commerce, Inc.  
Executive Vice President

Richard F. Marecki, Ph.D., CTC  
Department of Graduate Studies  
School of Food, Hotel and  
Tourism

"Did Visit" \_\_\_\_\_

THE POTENTIAL MARKET'S  
FOLLOW-UP COVER LETTER

August 9, 1990

Dear Visitor:

Recently we sent you a survey which will assist us in developing tourism in Genesee County.

If you have already completed the survey, please disregard this letter. We thank you for your cooperation in this very important matter.

If not, we ask that you take a few minutes to complete the enclosed survey. Your response is vital to the success of this study, as the results of this survey will help us make your future visits to Genesee County satisfying and worthwhile experiences. Please return the survey by the end of the week in the self-addressed stamped envelope to Rochester Institute of Technology who is conducting this research for Genesee County. We guarantee that all the information will be held in the strictest of confidence.

Should you have any questions, please contact the Genesee County Chamber of Commerce. The number is (716) 343-7440.

Thank you.

David L. Metzler  
President  
Genesee County Chamber  
of Commerce, Inc.

Richard F. Marecki, Ph.D., CTC  
Department of Graduate Studies  
School of Food, Hotel and  
Tourism

THE HISTORICAL MARKET'S

FIRST COVER LETTER

August 31, 1990

Dear Visitor:

We have selected you and many others through the public and private tourism industries of Genesee County to respond to the enclosed survey.

Only by obtaining the opinions of actual visitors such as yourself can we accurately determine what we have been doing well and where we need improvement.

The results of the survey will help us assure that we will be offering the services necessary to make your future visits to Genesee County satisfying and worthwhile experiences. We guarantee that all the information will be held in the strictest of confidence.

The survey should take only a few minutes of your time to complete. Please return the survey by the end of the week in the self-addressed, stamped envelope to Rochester Institute of Technology who is conducting this research for Genesee County.

Should you have any questions, please contact the Genesee County Chamber of Commerce, Inc. at (716)343-7440.

Thank you for your time in this very important matter.

David L. Metzler  
President  
Genesee County Chamber  
of Commerce, Inc.

Richard F. Marecki, Ph.D., CTC  
Department of Graduate Studies  
School of Food, Hotel and  
Tourism

THE HISTORICAL MARKET'S

FOLLOW-UP COVER LETTER

September 15, 1990

Dear Visitor:

Recently we sent you a survey which will assist us in developing tourism in Genesee County.

If you have already completed the survey, please disregard this letter. We thank you for your cooperation in this very important matter.

If not, we ask that you take a few minutes to complete the enclosed survey. Your response is vital to the success of this study, as the results of this survey will help us make your future visits to Genesee County satisfying and worthwhile experiences. Please return the survey by the end of the week in the self-addressed stamped envelope to Rochester Institute of Technology who is conducting this research for Genesee County. We guarantee that all the information will be held in the strictest of confidence.

Should you have any questions, please contact the Genesee County Chamber of Commerce. The number is (716) 343-7440.

Thank you.

David L. Metzler  
President  
Genesee County Chamber  
of Commerce, Inc.

Richard F. Marecki, Ph.D., CTC  
Department of Graduate Studies  
School of Food, Hotel and  
Tourism

**APPENDIX C**  
**THE LETTER OF INTENT**

August 6, 1990

David L. Metzler  
President  
220 East Main Street  
Batavia, New York 14020

Dear Sir or Madam:

In an attempt to better understand the needs of the tourists visiting Genesee County and to promote tourism, the Genesee County Chamber of Commerce and Rochester Institute of Technology are conducting a research project on tourism in Genesee County.

In order to obtain the information needed, we request your cooperation. Within the next two to three weeks Tammy Thompson and Julie Dowdall, graduate students at R.I.T., will be visiting your place of business requesting some names and addresses of past guests. These will go into Genesee County's data base and be used to gather tourist information in the form of questionnaires. Also, they will be leaving questionnaires that are geared towards the current market of guests. These questionnaires are to be filled out at the guests' convenience. Ms. Thompson or Ms. Dowdall will pick them up weekly. We guarantee all the information will be held in the strictest of confidence.

Your cooperation will help assure Genesee County will be offering the services necessary to make the visits of our future guests satisfying and worthwhile experiences. If you have any questions or comments, please feel free to call the office at 343-7440. Thank you for your time in this very important matter.

Sincerely,

David L. Metzler  
President  
Genesee County  
Chamber of Commerce, Inc.

**APPENDIX D**  
**THE SPSS-X PROGRAM**

UNNUMBERED

SET WIDTH = 132

TITLE GENESEE COUNTY TOURISM SURVEY

FILE HANDLE GENESEE/NAME = "GENESEE.DAT"

DATA LIST FILE = GENESEE/

VAR01 1 VAR02 2-3 VAR03 4-7(A) VAR04 8-9(A) VAR05 10-14 VAR06  
15 VAR07 16 VAR08 17-18 VAR09 19 VAR10 20 VAR11 21 VAR12A 22  
VAR12B 23 VAR12C 24 VAR12D 25 VAR12E 26 VAR12F 27 VAR12G 28  
VAR13A 29 VAR13B 30 VAR13C 31 VAR13D 32 VAR13E 33 VAR13F 34  
VAR13G 35 VAR13H 36 VAR13I 37 VAR14A 38 VAR14B 39 VAR14C 40  
VAR14D 41 VAR14E 42 VAR15A 43 VAR15B 44 VAR15C 45 VAR15D 46  
VAR16 47 VAR17A 48 VAR17B 49 VAR17C 50 VAR17D 51 VAR17E 52  
VAR18A 53 VAR18B 54 VAR18C 55 VAR18D 56 VAR18E 57 VAR18F 58  
VAR18G 59 VAR18H 60 VAR18I 61 VAR19A 62 VAR19B 63 VAR19C 64  
VAR19D 65 VAR19E 66 VAR19F 67 VAR19G 68 VAR19H 69 VAR19I 70  
VAR19J 71 VAR19K 72 VAR19L 73 VAR19M 74 VAR19N 75 VAR19O 76  
VAR19P 77 VAR19Q 78 VAR19R 79 VAR19S 80 VAR19T 81 VAR20A 82  
VAR20B 83 VAR20C 84 VAR20D 85 VAR20E 86 VAR20F 87 VAR20G 88  
VAR20H 89 VAR20I 90 VAR20J 91 VAR20K 92 VAR20L 93 VAR20M 94  
VAR20N 95 VAR20O 96 VAR20P 97 VAR20Q 98 VAR20R 99 VAR20S 100  
VAR21 101 VAR22 102 VAR23 103 VAR24 104 VAR25 105 VAR26 106  
VAR27 107-108 VAR28 109-110 VAR29 111-112

VARIABLE LABELS

VAR01 'TYPE OF PARTY'  
VAR02 'NUMBER IN PARTY'  
VAR03 'CITY'  
VAR04 'STATE OR PROVINCE'  
VAR05 'ZIP CODE'  
VAR06 'MARITAL STATUS'  
VAR07 'NUMBER OF CHILDREN'  
VAR08 'OCCUPATION'  
VAR09 'PURPOSE OF VISIT'  
VAR10 'LENGTH OF VISIT'  
VAR11 'PRIMARY DESTINATION OR STOPOVER'  
VAR12A 'EASTMAN KODAK TOURS'  
VAR12B 'G.C. VILLAGE MUSEUM'  
VAR12C 'G. RIVER GORGE'  
VAR12D 'SENECA HOUSE MUSEUM'  
VAR12E 'SENECA PARK ZOO'  
VAR12F 'SONNENBERG GARDENS MUSEUM'  
VAR12G 'G.EASTMAN HOUSE'  
VAR13A 'ARTPARK'  
VAR13B 'BUFFALO ZOO'  
VAR13C 'IROQUOIS WILDLIFE REFUGE'  
VAR13D 'MAID OF THE MIST'  
VAR13E 'NAVAL SERVICEMENS PARK'  
VAR13F 'OBSERVATION TOWERS'  
VAR13G 'N.F.AQUARIUM'  
VAR13H 'OLD FORT NIAGARA'  
VAR13I 'WAX MUSEUM'  
VAR14A 'ARTS COUNCIL GALLERY'  
VAR14B 'BALLOONS OVER LETCHWORTH'  
VAR14C 'GLEN IRIS INN'

VAR14D 'LETCWORTH STATE PARK'  
 VAR14E 'WYOMING GASLIGHT VILLAGE COMPLEX'  
 VAR15A 'ATTICA HISTORICAL SOCIETY MUSEUM'  
 VAR15B 'BYRNCLIFF RESORT'  
 VAR15C 'CIDER MILL'  
 VAR15D 'BEAVER MEADOW'  
 VAR16 'ACCOMMODATIONS'  
 VAR17A 'PERSONAL VEHICLE'  
 VAR17B 'BUS'  
 VAR17C 'AIRPLANE'  
 VAR17D 'RENTAL VEHICLE'  
 VAR17E 'TRAIN'  
 VAR18A 'MAILED REQUEST'  
 VAR18B 'MAGAZINE OR BROCHURE'  
 VAR18C 'INFORMATION BOOTH'  
 VAR18D 'G.C. TRAVEL GUIDE'  
 VAR18E 'OTHER'  
 VAR18F 'FRIENDS OR RELATIVES'  
 VAR18G 'TRAVEL AGENT'  
 VAR18H 'AUTO CLUB'  
 VAR18I 'NO SOURCES USED'  
 VAR19A 'D.L. THEME PARK AND CAMP'  
 VAR19B 'FARMERS MARKET'  
 VAR19C 'CAMPING'  
 VAR19D 'OUTLET FACTORIES'  
 VAR19E 'G.C. MALL'  
 VAR19F 'GOLF'  
 VAR19G 'HISTORICAL LOCATIONS'  
 VAR19H 'HARNESS RACING'  
 VAR19I 'BERGEN SWAMP'  
 VAR19J 'OTHER'  
 VAR19K 'MUSEUMS'  
 VAR19L 'G.C. FAIRGROUNDS'  
 VAR19M 'G.C. PARK'  
 VAR19N 'G. SYMPHONY'  
 VAR19O 'CROSS COUNTRY SKIING'  
 VAR19P 'SNOWMOBILE TRAILS'  
 VAR19Q 'FISHING'  
 VAR19R 'HUNTING'  
 VAR19S 'PRO BASEBALL'  
 VAR19T 'ANTIQUA SHOPS'  
 VAR20A 'D.L. THEME PARK AND CAMP'  
 VAR20B 'FARMERS MARKET'  
 VAR20C 'CAMPING'  
 VAR20D 'OUTLET FACTORIES'  
 VAR20E 'G.C. MALL'  
 VAR20F 'GOLF'  
 VAR20G 'HISTORICAL LOCATIONS'  
 VAR20H 'HARNESS RACING'  
 VAR20I 'BERGEN SWAMP'  
 VAR20J 'MUSEUMS'  
 VAR20K 'G.C. FAIRGROUNDS'

VAR20L 'G.C. PARK'  
 VAR20M 'G. SYMPHONY'  
 VAR20N 'CROSS COUNTRY SKIING'  
 VAR20O 'SNOWMOBILE TRAILS'  
 VAR20P 'FISHING'  
 VAR20Q 'HUNTING'  
 VAR20R 'PRO BASEBALL'  
 VAR20S 'OTHER'  
 VAR21 'ANNUAL INCOME'  
 VAR22 'ACCOMMODATIONS BUDGET'  
 VAR23 'FOOD BUDGET'  
 VAR24 'TRANSPORTATION BUDGET'  
 VAR25 'ATTRACTIONS BUDGET'  
 VAR26 'PERSONAL BUDGET'  
 VAR27 'SCALE OF SATISFACTION'  
 VAR28 'AMOUNT OF VISITS'  
 VAR29 'MARKET'

VALUE LABELS    VAR01 1'IMMEDIATE FAMILY' 2'GROUP OF FRIENDS'  
                   3'TOUR MEMBER' 4'GROUP OF RELATIVES' 5'BUSINESS  
                   ASSOCIATES' 6'TRAVELING ALONE'/  
 VAR06 1'SINGLE' 2'DIVORCED' 3'SEPARATED' 4'WIDOWED'  
                   5'MARRIED/  
 VAR07 1'NONE' 2'ONE' 3'TWO' 4'THREE' 5'FOUR'  
                   6'FIVE' 7'MORE THAN FIVE'/  
 VAR08 1'PROFESSIONAL OR TECHNICAL' 2'MANAGER OR  
                   ADMINISTRATION' 3'AGRICULTURE' 4'MANUFACTURING'  
                   5'STUDENT' 6'TRANSPORTATION' 7'RETAIL' 8'MEDICAL'  
                   9'ENGINEERING' 10'CRAFTSMAN' 11'SELF EMPLOYED'  
                   12'SALES WORK' 13'GOVERNMENT' 14'RETIRED'  
                   15'CLERICAL' 16'NOT EMPLOYED' 17'LAW' 18'OTHER'/  
 VAR09 1'VACATION' 2'BUSINESS' 3'OTHER' 4'VISIT  
                   FRIEND OR RELATIVE' 5'SPECIFIC EVENT'/  
 VAR10 1'LESS THAN ONE DAY' 2'THREE TO FIVE DAYS'  
                   3'MORE THAN ONE WEEK' 4'ONE TO THREE DAYS' 5'FIVE  
                   TO SEVEN DAYS'/  
 VAR11 1'PRIMARY DESTINATION' 2'STOPOVER'/  
 VAR12A TO VAR15D 1'YES' 2'NO'/  
 VAR16 1'CAMPGROUNDS' 2'BED AND BREAKFAST' 3'NOT  
                   STAYING IN GENESEE COUNTY' 4'HOTEL OR MOTEL'  
                   5'FAMILY OR FRIENDS'/  
 VAR17A TO VAR20S 1'YES' 2'NO'/  
 VAR21 1'UNDER 20,000' 2'20,000-30,000' 3'30,001-  
                   40,000' 4'40,001-50,000' 5'50,001-60,000' 6'60,001-  
                   70,000 7'70,000-80,000 8'OVER 80,000'  
 VAR22 1'LESS THAN \$15' 2'\$16-30' 3'INCLUDED IN TOUR  
                   PRICE' 4'\$31-45' 5'\$46-60' 6'\$61-75' 7'MORE THAN  
                   \$75'/  
 VAR23 1'LESS THAN \$5' 2'\$6-10' 3'\$11-15' 4'\$16-20'  
                   5'\$21-25' 6'MORE THAN \$25'/  
 VAR24 TO VAR26 1'LESS THAN \$5' 2'\$6-10' 3'INCLUDED  
                   IN TOUR PRICE' 4'\$11-15' 5'\$16-20' 6'\$21-25' 7'MORE  
                   THAN \$25/

```

VAR29 1'POTENTIAL MARKET' 2'CURRENT CAMPGROUND'
3'CURRENT HOTEL' 4'CURRENT B&B' 5'HISTORICAL
CAMPGROUND' 6'HISTORICAL HOTEL' 7'HISTORICAL B&B'
8'CAMPGROUND' 9'HOTEL' 10'B&B'/
RECODE VAR02 (6 THRU 99 =6)
RECODE VAR29 (2,5=8)
RECODE VAR29 (3,6=9)
RECODE VAR29 (4,7=10)
RECODE VAR05 (10000 THRU 10023 = 'NEWY') INTO VAR03
RECODE VAR05 (10308 THRU 10314 = 'STAT') INTO VAR03
RECODE VAR05 (10458,10462='BRON') INTO VAR03
RECODE VAR05 (10504 THRU 10598 = 'WEST') INTO VAR03
RECODE VAR05 (10701,10704='YONK') INTO VAR03
RECODE VAR05 (10918 THRU 10992 = 'SUFF') INTO VAR03
RECODE VAR05 (11204 THRU 11209 = 'BROO') INTO VAR03
RECODE VAR05 (11356 THRU 11359 = 'FLUS') INTO VAR03
RECODE VAR05 (11411 THRU 11427 = 'JAMA') INTO VAR03
RECODE VAR05 (11507 THRU 11566 = 'NASS') INTO VAR03
RECODE VAR05 (11704 THRU 11779 = 'HICK') INTO VAR03
RECODE VAR05 (11901 THRU 11980 = 'RIVE') INTO VAR03
RECODE VAR05 (12009 THRU 12306 = 'ALBA') INTO VAR03
RECODE VAR05 (12528 THRU 12603 = 'POUG') INTO VAR03
RECODE VAR05 (12839 THRU 12887 = 'GLEN') INTO VAR03
RECODE VAR05 (12901 THRU 12958 = 'PLAT') INTO VAR03
RECODE VAR05 (13021 THRU 13219 = 'SYRA') INTO VAR03
RECODE VAR05 (13317 THRU 13502 = 'UTIC') INTO VAR03
RECODE VAR05 (13601 THRU 13676 = 'WATE') INTO VAR03
RECODE VAR05 (13748 THRU 13904 = 'BING') INTO VAR03
RECODE VAR05 (14001 THRU 14304 = 'BUFF') INTO VAR03
RECODE VAR05 (14414 THRU 14624 = 'ROCH') INTO VAR03
RECODE VAR05 (14701 THRU 14780 = 'JAME') INTO VAR03
RECODE VAR05 (14801 THRU 14905 = 'ELMI') INTO VAR03
RECODE VAR05 (15216,15229 = 'PITT') INTO VAR03
RECODE VAR05 (15825,15846 = 'DUBO') INTO VAR03
RECODE VAR05 (16037 THRU 16201 = 'NEWC') INTO VAR03
RECODE VAR05 (16506 THRU 16552 = 'ERIE') INTO VAR03
RECODE VAR05 (16901 THRU 16950,17724,17740 = 'WILL') INTO VAR03
RECODE VAR05 (17025 THRU 17241 = 'HARR') INTO VAR03
RECODE VAR05 (17536,17545 = 'LANC') INTO VAR03
RECODE VAR05 (18224,18641 = 'WILK') INTO VAR03
RECODE VAR05 (18419,18837,18850 = 'SCRA') INTO VAR03
RECODE VAR05 (18940,18944,19380,19446 = 'SOUT') INTO VAR03
RECODE VAR05 (19025 THRU 19128 = 'PHIL') INTO VAR03
RECODE VAR05 (43015 THRU 43964 = 'COLU') INTO VAR03
RECODE VAR05 (44017 THRU 44113 = 'CLEV') INTO VAR03
RECODE VAR05 (44412,44512 = 'YOUN') INTO VAR03
RECODE VAR05 (45107 THRU 45255 = 'CINC INTO VAR03
RECODE VAR05 (45701 THRU 45764 = 'ATHE') INTO VAR03
RECODE VAR28 (10 THRU 99 = 10)
FREQUENCIES VARIABLES = VAR01 TO VAR29
/STATISTICS = ALL
FILE HANDLE GENESEE/NAME = "GENESEE.OUT"

```

SAVE OUTFILE = GENESEE  
FINISH