



Last month, STPB asked for a report benchmarking visitor services.
 The timing is a logical extension of the budget
 V.S. is a third of our budget and the ROI isn't clear cut.
 This was a difficult project to turn around quickly but it's been helpful
 Our sources for this:

- Destination Marketing Assoc. International (DMAI) 2013 DMO Visitor Information Center Study
- VISITOR INFORMATION CENTERS & SERVICES IN THE DIGITAL AGE by Roger Brooks International Consulting
- Survey of NYS CVBs SurveyMonkey (in-house, May-June) and interviews with 13CVB directors in June

Major takeaways from the project, our costs are much higher than average:

- We have a cost per visit of \$11.56 in 2014 (\$159,000/13,838)
- Forecast to go over \$12.00 in 2015

Benchmark numbers

- DMAI National Benchmark--\$2.72 per visit
- Roger Brooks International (consultant) \$2.50

Reverse math $\$2.72 \times 13,838$ walk-ins yields a benchmark budget of \$37,639
 That's unrealistic for Ithaca rent + overhead + a manager + living wage salaries

Bigger question: would that be the visitor services operation the community wants? Is that what we need to support the tourism program and the strategic plan? That's ultimately an STPB/budget question, Something to address for 2016 when Taughannock Falls VIC becomes available

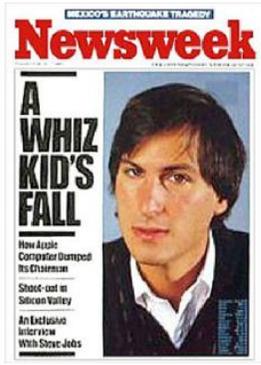
What we can say from this project:

How we got here
 What we do and how that compares to the nation & state
 What's on the horizon

The thing that struck us: how much visitor services department does that's not visitor services. It's more community services. In a lot of ways it's the hands that do the work of the strategic plan.

1985...

...looking back, to when room tax was created



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1985—Tompkins County Room Tax Program was being created.

Madonna owned the world

Steve Jobs was a failure

Commercial email was two years old

In NYC, Michael Douglas was filming "Wall Street" his character Gordon Gecko demoing the first cell commercial cell phone, the 1984 Nokia DynaTack 800x 2.5 pounds, \$3,995, \$50 per month service, calls cost 40 cents a minute

1985...



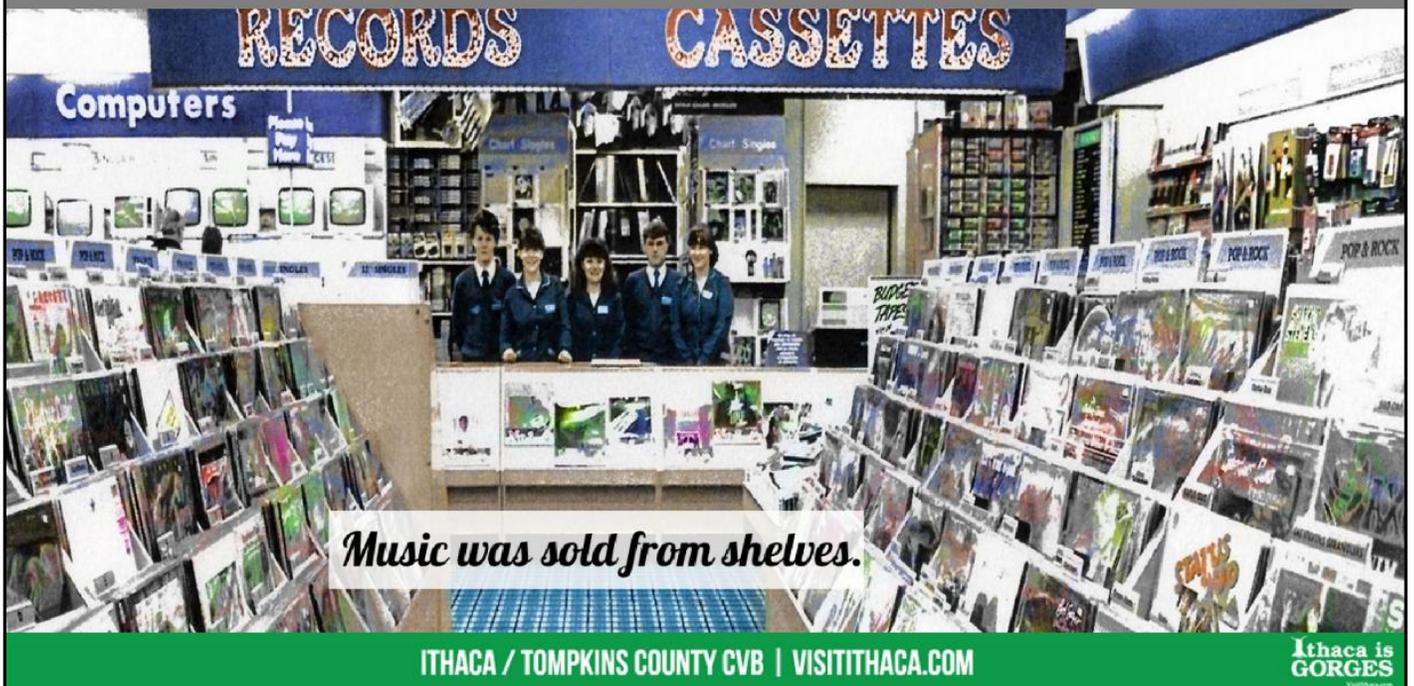
Disney World welcomed its 200-millionth guest

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Four years before the birth of the internet
I Love NY and the matching funds program was 8 years old and just beginning to
offer significant funds to counties.

1985...



There were tens of thousands of record stores.

Think about it. This is how information and entertainment was distributed before the internet.

Retail storefronts were essential to disseminate printed/stamped/manufactured media.

1985...



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And tens of thousands of travel agents who dealt in travel info like record stores sold music. Look here the wall of brochures, the ticket printer, the phones. This was THE way to distribute travel info pre-internet.

1985...

Distribution was key.



Brochures are us!

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Getting your brochures to the traveling public was the premier marketing goal of the travel industry.

Aside—how would you like to be in this association today?

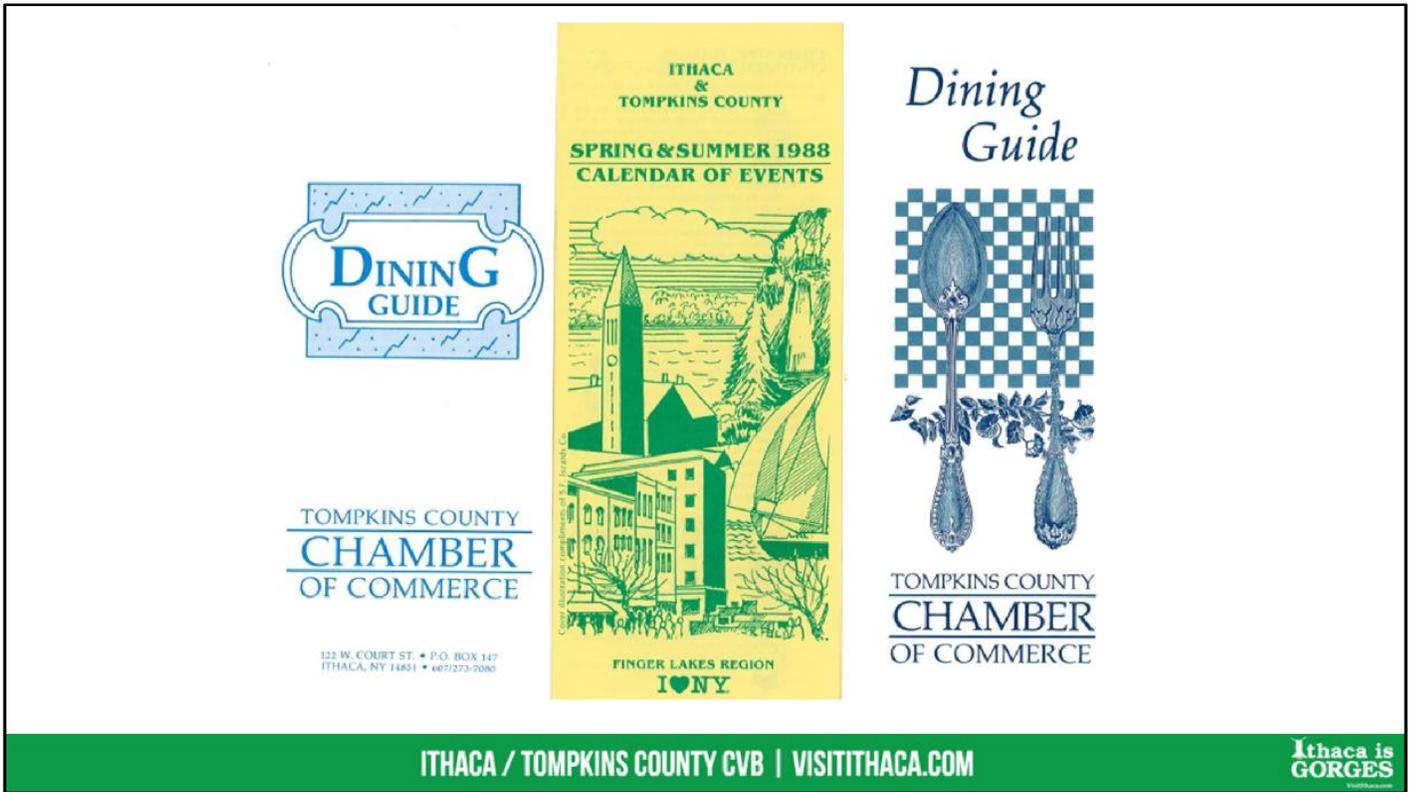
*the Chamber of Commerce
handled Tourism Promotion...*



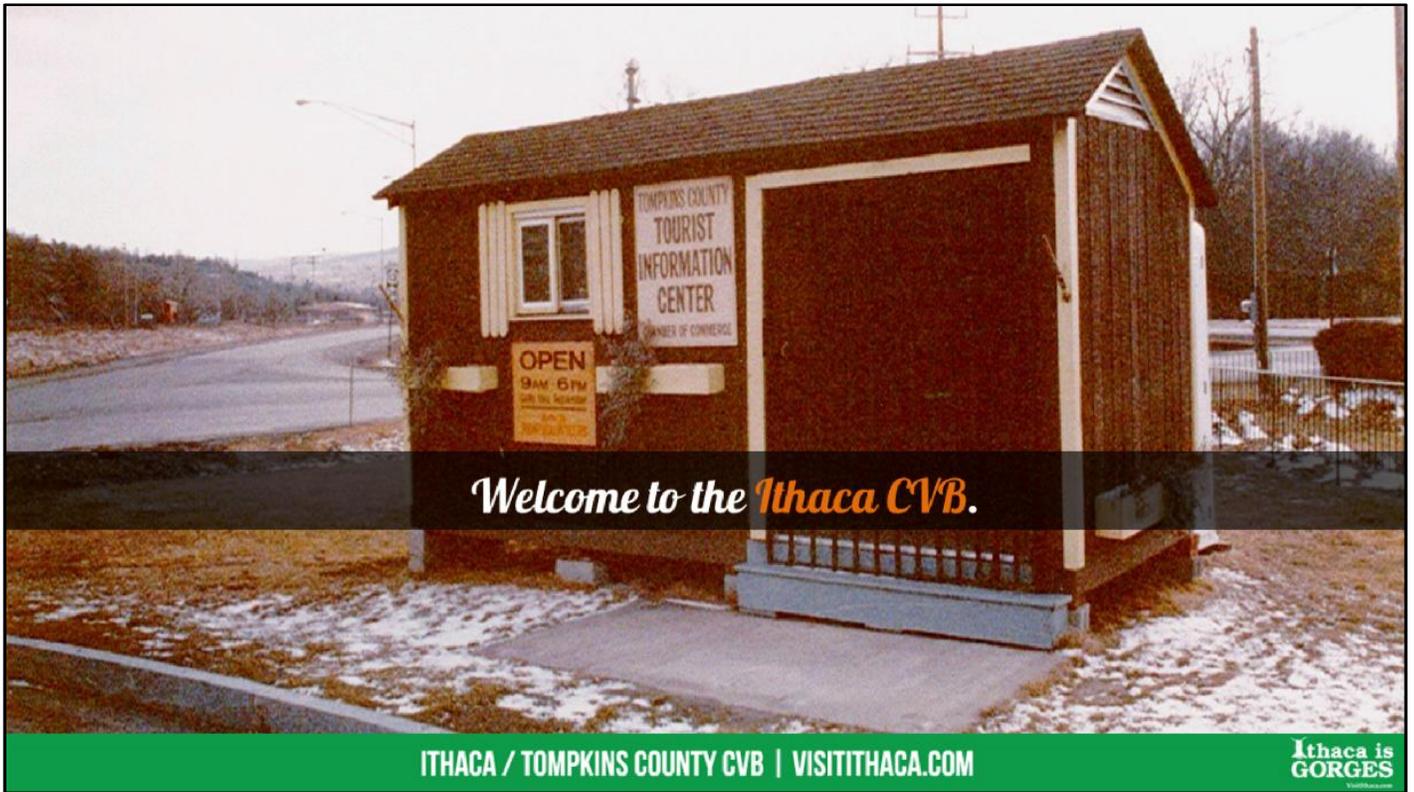
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The Chamber of Commerce was in charge of Tourism Promotion
Here's the old offices at 122 W. Court St.



These are typical tourism promotion brochures at the time Room Tax began
We found chamber tourism promotion ads dating back to the 1920



And here's the Ithaca/Tompkins Visitor Center in 1985. No that long ago. A bit embarrassing, an IVY LEAGUE COMMUNITY should do better than this. We guess that this building is one of the reasons room tax was implemented. Our first funds from room tax were in 1987. That's the official birthdate of the CVB.



904 East Shore Drive in 1987

*and then,
there was room tax . . .*



The commitment of funding led the Chamber to build our current building, it was dedicated in spring, 1989. Essentially it was purpose-built as a visitor center with a chamber on top. Note: this image is prior to the 2006 expansion (two floors added on the right side).

**1989-2006: Crowded . . .
6 staffers & 18,000 visitors
in 2,000 sq ft.**

Culture of Shared Services

- *Visitor information*
- *Collateral & brochure distro*
- *Reservations*
- *Fulfillment*
- *Research, Database, Sales*



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Crowded space created a culture of shared high-level services. Visitor services staff pitched in on all aspects of CVB work.

What are the Benchmarks?

of Walk-Ins 93%

\$ Retail Sales 81%

**# of Walk-Ins
Who Are Visitors
to Destination** 79%

**# of Inquiries Handled
(phone, email, mail, social)** 70%

**# of Walk-Ins Assisted
by VIC Counselors** 54%



*At the Preble Visitors Center,
they track toilet flushes.*

NATIONWIDE STATISTICS PROVIDED BY DMAI 2013 VISITOR INFORMATION CENTERS STUDY

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It turns out benchmark data is not very robust. This reflects an industrywide attitude that visitor services is not a priority.

These stats are from DMAI national study of Visitor Information Centers showing that percents of CVBs that collect data on these basic services. Note the difference between walk ins and walk ins aided. This throws the benchmark \$2.72 cost per visit out the window. NYS research showed that the Preble VIC actually counts traffic by toilet flushes.

Services provided by VICs

% of DMO Respondents	Budget \$1,000,000-\$1,999,999	Ithaca/Tompkins Visitors Services
Travel Counseling to Walk-Ins	100	13,838 in 2013
Respond to Telephone Inquiries	91	5,535 in 2013
Respond to Email Inquiries	87	3,882 in 2013
Respond to Mail Inquiries	83	Yes, but declining
Sell Merchandise	52	Yes, \$9,631 in 2013
Survey VIC Walk-Ins	61	Zip Code, Winter Recess, Chmura
Sign Visitors Up for E-Newsletters	57	Yes
Respond to Social Media Inquiries (Facebook, Twitter, Etc.)	52	Yes, increasing rapidly
Make Reservations (Hotel, Restaurant, Tour, Etc.)	41	25 times per week in summer
Staff Trade/Consumer Shows	39	Four shows in 2014
Sell Tickets (Attractions, Etc.)	24	Planet Walk, Vino Visa, Ithaca Festival
Training	24	Hospitality Stars
Respond to Text Inquiries	9	Coming
Other*	13	<ul style="list-style-type: none"> • Meeting support, with 3 swim meets and 2 conferences in 2014 • Town-gown support with 8 campus events in 2013 • Marketing fulfillment with 475 outlets, 40,286 total pieces • Marketing database management • Sales research

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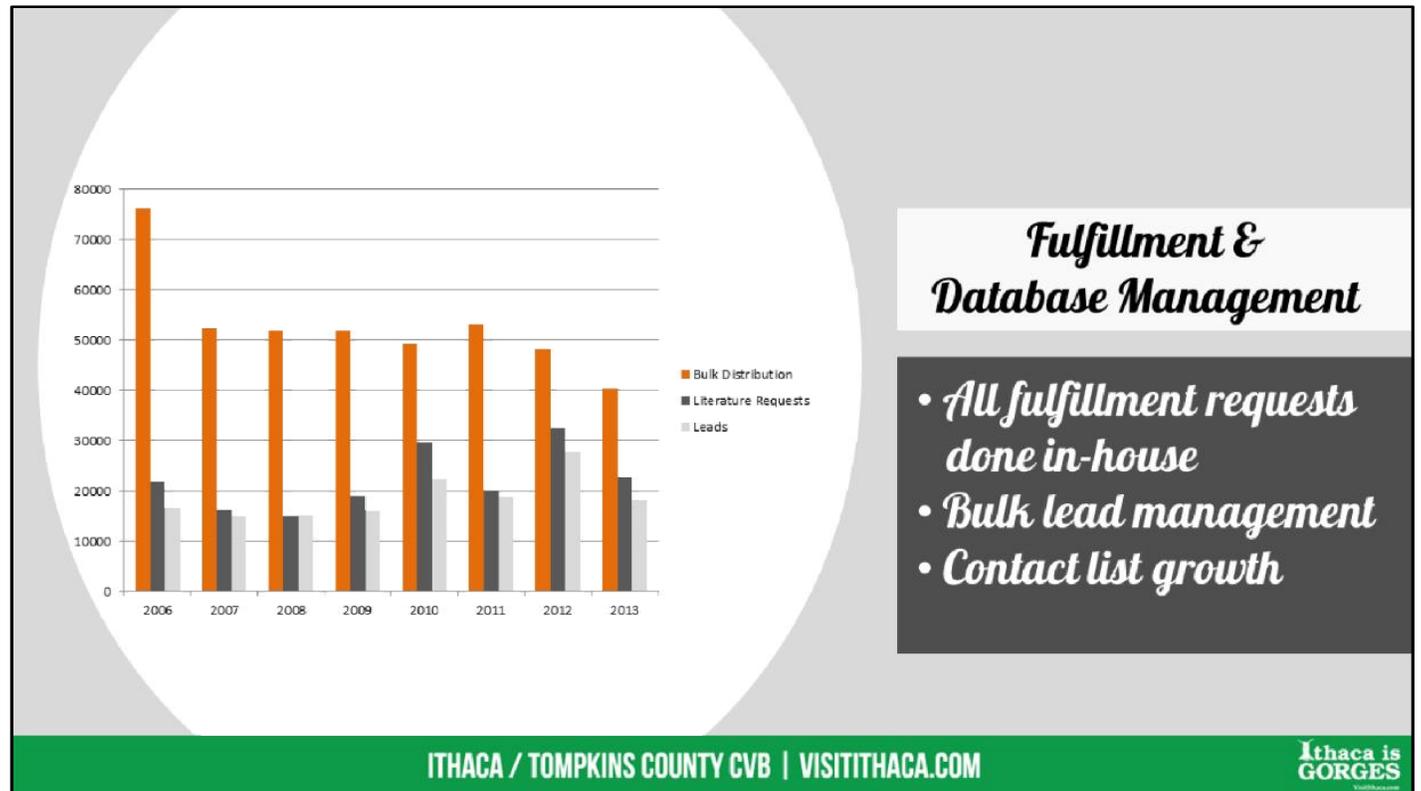


Toilet jokes aside, here's the detailed National Benchmarks from DMAI – These are services at most visitor centers in our budget class

Note how much more we're doing.

Add up all the individual contacts from walk-ins to calls, to emails to individual requests for literature: **55,021 individual contacts in 2013**

Divide that by budget and get **\$3.07 per contact**. Compares favorably to DMAI's **\$2.72**



“Other” Services

While many CVBs farm out their brochure distribution to fulfillment houses, the visitors services team does this all in house. This shortens the lead time to mere days, so potential travelers receive the material they ordered while Ithaca is still fresh in their mind.

Fulfillment houses take between 2-6 weeks for delivery.

Bulk leads are also managed and pursued for contact growth, not only for collateral distribution, but for our email marketing campaign.

Marketing, Advertising & PR Support

- Partner design
- Internal marketing design
- PR Pitching

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“Other” Services

The “other” services we do are all about supporting other elements of the County Tourism Program and Tourism Plan

In the last month alone, Visitors Services produced a rack card for the visitors centers, two banner ads for Cayuga Nature Center, and a postcard for the CVB sales team, which, if working with a designer on contract, would cost upwards of \$1,500.

Emerging Focus Area: Untapped Niche Markets



Goal: Grow under-tapped niche visitor markets and experiences.

Untapped niche markets are defined as highly focused demographic and interest-based visitor markets for which Tompkins County holds a strategic advantage because of unique local attributes. A focus on growing niche visitor markets and experiences will support our aim "presenting the unique place" of Tompkins County, a niche market focus will allow targeted efforts to be used to increase destination visibility and marketing.

Means include encouraging pet tourism, healing art and yoga-based tourism, ethnically-based tourism, biking, unique indoor tournaments, specialty music, and museum visitings. These just touch on the list of potential ideas that are ripe for further development in Tompkins County.

Foundation Focus Area: Groups



Goal: Expand meetings, conferences and group tours.

Meetings, conferences and group tours are market segments that can build our local tourism economy by bringing business to hotels, restaurants and attractions during off-peak periods. By maintaining consistent marketing efforts, we can attract

new numbers of hotel guests to Tompkins County, a priority on which we will continue to work. In addition, we will make the most of our new expertise in the new group tours. Our Group Sales Department at the CVB is currently working on this project.

Sales Support, Group Tours

- Agritourism & Culinary
- Birding
- Outdoor
- Master Gardeners

Visitor Services staff is working with the sales department to prospect clubs and groups for motorcoach tours. Both are foundation items in the strategic plan

ArtSpace

TOPKINS COUNTY HOSPITALITY STAR
EXCEEDING EXPECTATIONS

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Packages & Deals

Downtown Visitors Center

Community Services

- CAP
- DIA
- Lodging & Attractions
- Campus Communities
- Hospitality Training
- Wayfinding

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Visitor Services is really “community services” supporting other the overall tourism program and strategic plan
 CAP, DIA, Lodging Community on website, Town Gown supporting campus events, Hospitality Training

You count up all the “other” and we’re looking at 10s of thousands of visitor contacts and tremendous amount of community support

VISITOR SERVICES	2012	2013	2014	2015 Request	National Ave. \$1-2 Million Budget	Notes
Payroll	114,644	120,791	120,614	124,839	64,710	Incs. Taughannock VIC Staffing (ex WR)
DVC Rent	11,300	11,670	12,020	14,000	27,286	East Shore Drive Rent included in Admin
Travel	2,200	2,000	2,200	3,000	1,389	
Staff Development	1,000	750	700	2,300	1,848	
Furnishing	500		400	2,000	653	Retail fixtures, POS system
Cost of Goods Sold	6,500	6,000	5,000	8,700	0	Investment for increased revenue
Advertising	750	750	500	5,400	12,786	Ads for retail, visitation
Misc. Other	1,500	1,200	1,200	9,000	17,068	Feasibility--digital visitor services
Subtotal	138,394	143,161	159,134	169,239	125,950	

The increased services come with a cost.

This is our budget compared to the DMAI national averages.

We're spending about \$60,000 more than average, most on staffing

It's from an internal culture of shares services and external requests to support the tourism program and plan



Looking Forward

90% of Americans have immediate access to the Internet.

94% use the internet to decide where to travel.

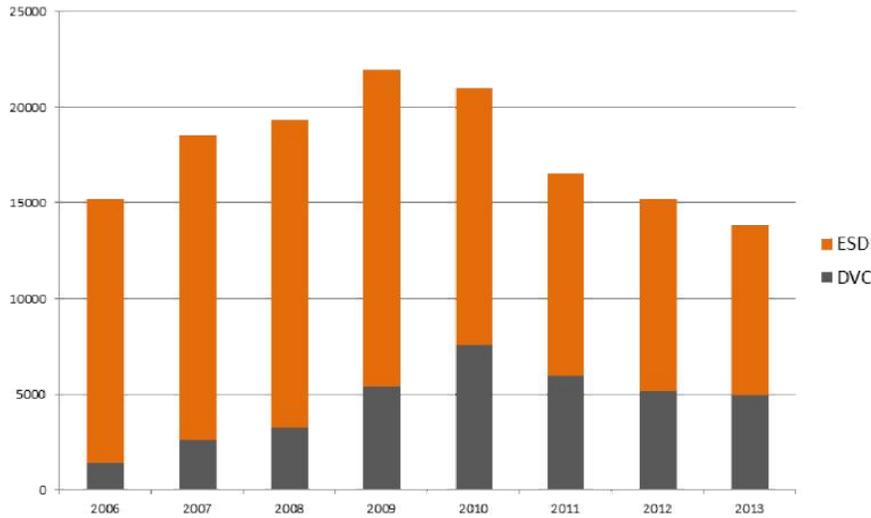
Visitor Centers are changing.

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Now we'll look at some benchmarks that impact where we go from here.

Visitors Center Walk-In Traffic.



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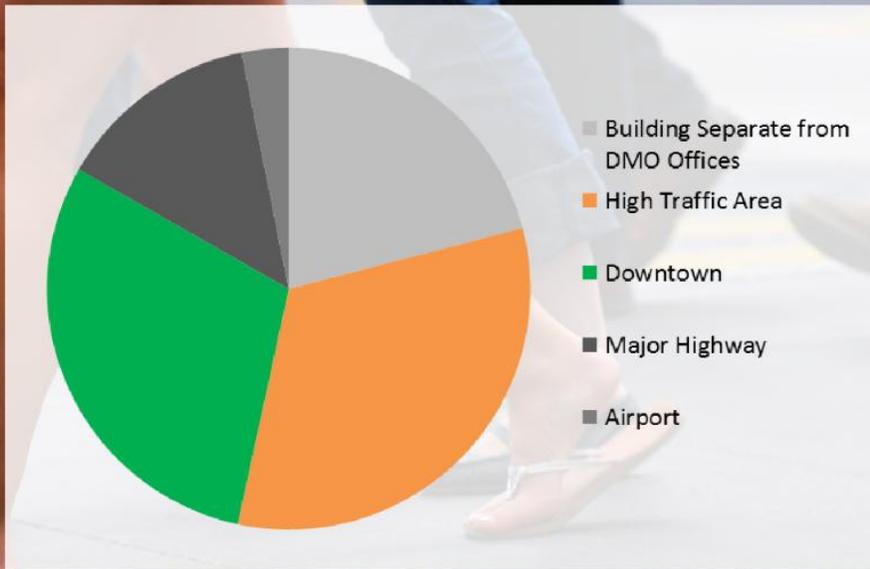
We have a foot traffic issue that will effect our operations moving forward.

DMAI isn't picking up on declining foot traffic. But in NY it's for sure an issue
We surveyed CVBs and Interviewed CVB directors, all but one CVB said that traffic is flat or declining

Interesting to note here the stability of Downtown traffic
Most of the decline is from East Shore Drive

New opportunity at Taughannock Falls will increase our foot traffic and it's consistent with national & state trends: VICs downtown and high-traffic attractions perform better.

Location of Primary Visitor Center Nationwide



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Nationally, this is visitor center location from the DMAI survey

The trend here definitely is Moving VICs to Prime Downtown/Attraction locations. Big growth areas

That's reflected both Nat and in NYS: BUFF and SYR both opened new downtown VICs this year

90% of adult travelers have mobile phones.

DIRECTIONS
RECOMMENDATIONS & REVIEWS
RESERVATIONS

We've said "so long" to 1985

STATISTICS PROVIDED BY PEW RESEARCH INTERNET PROJECT

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So for the future? We're moving out of 1985. We've just submitted a REDC Grant proposal to find technology to bring mobile communication into the VICs. Visitor Services will be more important than ever – instead of being limited by the number of visitors who walk in through the door, they will now have an unlimited audience via mobile communication.

phone to get directions, recommendations, or other location-based information. This statistic shows that users are turning to the web to access information, and aging Visitor Information Centers do not have the ability to speak to travelers this way.

\$9000 budget set aside for grant contribution – CVB Advisory committee recommends outreach to local attractions and B&B's to get partners up to speed on how to access and have the greatest impact using new technologies.

Average length of stay to Tompkins County, 1.4 nights

*Average length of stay of people who were surveyed
at the Visitor Center, 3.5 nights*

STATISTICS PROVIDED BY 2010 CHMURA STUDY

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We looked for data that supported the ROI of visitor centers and found this. It's from the Chmura visitor intercepts. This is what East Shore Drive visitors reported compared to the average traveler. It's not conclusive, no definitive cause and effect. But these visitors might be incredibly valuable customers.