

8

Tourism Development and Marketing



OVERVIEW

Most of this Preservation and Management Plan is devoted to the extraordinary resources available throughout the Erie Canalway National Heritage Corridor. Although these resources are critical to the success of heritage tourism, it is important to understand that preservation, conservation, or development of recreation and interpretation resources *by themselves* do not produce tourist visitation. However, expanded, coordinated, and focused tourism development and marketing can and will yield economic benefits.

For the Corridor, the ultimate purpose of tourism development and marketing is to utilize the region's heritage resources to stimulate economic impact. Heritage resources attract residents and visitors alike by providing desirable amenities, experiences, and a sense of place. Tourism, in turn, can support local businesses, job opportunities, and tax revenues, and expand interest in the preservation of community culture and heritage. While the preceding chapters of this Plan focus on the Corridor's resources and economy, tourism development and marketing looks primarily beyond the Corridor, to the potential visitor.

Tourism is a key component of the New York economy, and tourism marketing efforts by multiple state and local organizations are already in place, contributing to significant visitation throughout upstate New York. However, given the national significance of the canal system and the breadth and quality of its historic, natural, recreational, and interpretive resources, the Corridor is not as strong a factor in that existing marketing or visitation as it can and should be. While upstate communities express strong support for attracting tourists, it is generally believed that the Corridor itself does not have a high enough concentration of high-quality tourist destinations and that there is a lack of awareness

Photo:
Tour boat passing through Lock E-24 at
Baldwinsville

Erie Canalway
National Heritage Corridor
Preservation and Management Plan

of the canal system, its significance, and its value to potential visitors. Clearly, there is a need for product development and more in-depth, readily available information on the Corridor.

Tourism development and marketing for the Corridor must support strategies for the economic impact on the region as a whole as well as strategies for its individual regions and communities. Each community has a different role to play, is at a different stage of development, and will participate in the Corridor tourism effort at the level it chooses. In this respect, the Erie Canalway National Heritage Corridor seeks to raise the profile of the entire region as a tourist destination, to fill strategic gaps, and to make more strategic use of the region's heritage resources in order to increase the reach and effectiveness of existing tourism development and marketing efforts.

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Some initial marketing steps have already been implemented, including a basic Corridor brochure and website and an exhibit at the Peebles Island Visitor Center in Waterford. Efforts such as an expanded Corridor-wide calendar of events and distribution of maps and brochures, which are already supported by the Corridor's key tourism partners, can also be implemented quickly and at relatively low expense. However, other tourism needs, such as product development and the improvement of visitor services, will require larger investments of technical skill and funding.

GOALS

The tourism development and marketing goal for the Erie Canalway National Heritage Corridor is that *the Corridor will be a 'must-do' travel experience for regional, national, and international visitors*. Four objectives have been identified as milestones toward this goal:

Attract visitors to maximize economic impact from tourism within the Corridor

The economic impact of tourism to the Corridor can be maximized by increasing visitor spending through increased visitation, extended stays, and higher value customers. These objectives, in turn, require solid research, customer-driven and user-friendly mechanisms to facilitate travel sales, and a memorable, enriching visitor experience that yields high levels of satisfaction and return visitation.

Develop the Corridor tourism product while protecting and preserving the resource

The key to a satisfying visitor experience is the quality of the tourism product and visitor infrastructure: heritage and recreational resources and visitor information and amenities united by a consistent, recognizable identity and a strong sense of place. Visitor use management policies must be employed to keep increased numbers of visitors from overwhelming the carrying capacity of existing resources.

Provide coordination and technical assistance to the tourism development and marketing community

Increased coordination will improve the efficiency, reach, and effectiveness of existing tourism development and marketing efforts while providing an opportunity to establish a stronger, more unified identity for the Corridor. While some existing communities, destinations, and marketers operate sophisticated tourism efforts, others are in need of assistance with visitation research, assessments of visitor readiness, and marketing targeted to local resources and needs.

Communicate to residents the ability of heritage tourism to stimulate education, preservation, visibility, and visitation

Corridor residents are generally enthusiastic about tourism, but are understandably concerned about negative impacts to heritage resources and local community character, and few are fully aware of the potential for heritage-oriented tourism to help support preservation, conservation, interpretation, and recreation as part of a broader heritage development strategy.

CONTEXT

There are many potential national, state, and local partners for tourism development and marketing of the Corridor. While each has its own focus, all offer complementary opportunities, large and small, for the Corridor to utilize in its efforts. Listed below are key resources (see Appendix 9 for a more complete list).

NATIONAL PARK SERVICE

In addition to managing and promoting four National Park System units in the Corridor that are heritage tourism destinations in their own right (see Chapter 3, *Protecting Our Heritage*), the NPS assembles National Register Travel Itineraries spotlighting different themes and geographic regions across the country, grounded in sites listed on the National Register of Historic Places. The NPS has also launched “See America’s National Parks,” a promotional campaign and partnership with the Travel Industry Association of America and the National Park Foundation, with its own website, branded travel packages, and domestic and international marketing materials.

NEW YORK STATE CANAL CORPORATION

The Canal Corporation conducts the most comprehensive marketing of the canal system and Erie Canalway Trail: domestic and international advertising, producing and distributing publications, attending trade shows, conducting public relations, sponsoring special events, and hosting a regularly updated website which includes a calendar of events, visitor services information, and links to tour and rental boat operators. The Canal Corporation also administers a matching grant program to local organizations and agencies for tourism marketing, provides educational programming for school children through the

The Canal Corporation conducts the most comprehensive marketing of the canal system and Erie Canalway Trail.

tugboat *Urger* and classroom support, and uses the tug to promote the canal system at festivals in Corridor communities.

Although its jurisdiction covers the waterways and adjacent lands and does not extend throughout the Erie Canalway National Heritage Corridor, the Canal Corporation is a key strategic partner for Corridor tourism development and marketing. The Corridor supports the Canal Corporation's long-term plan to assert a "Canals of the 21st Century" theme; shift marketing efforts from a solely water-based campaign to one based on landside recreational opportunities throughout the region; attract automobile travelers within the 3 to 5 hour driving distance range to canalside festivals, attractions, and boating activities; expand winter recreational options; and create a signature recreational event based on the canal system and canalside trails and facilities.

EMPIRE STATE DEVELOPMENT CORPORATION, DIVISION OF MARKETING, ADVERTISING AND TOURISM

The New York State Division of Marketing, Advertising and Tourism and its partners have recently initiated some creative marketing programs, including an Underground Railroad program and the "Heart of Arts" program. More of these initiatives are needed.

The division administers the "I LOVE NY" campaign, a full service statewide tourism marketing effort with a primary focus on attracting visitors from outside New York State. The campaign has begun to focus greater attention on the growing heritage tourism market through advertising, travel guides, and partnerships with cultural organizations. While it promotes the state's wide variety of attractions, and has included the canal system in many of its promotions, it is beyond the scope of the division to promote any individual tourism region or attraction to the exclusion of others. However, the "I LOVE NY" campaign provides enormous opportunities for local and regional partners to leverage their marketing efforts (see below).

REGIONAL / COUNTY / LOCAL TOURISM MARKETING RESOURCES

On a local and regional level, tourism promotion agencies (TPAs), convention and visitor bureaus (CVBs), and other organizations actively promote tourism to their service areas. In some places in the Corridor, local governments and businesses invest in tourism development and marketing through financing promotional activities, creating cultural districts, and brokering public-private partnerships. Many of these efforts are affiliated with the "I LOVE NY" campaign and receive funding from the New York State Division of Marketing, Advertising and Tourism or the state's Cultural Tourism Initiative (see above). Some focus on canal-related heritage and recreation opportunities. Depending on location and resources, these organizations range from part-time programs to highly sophisticated, competitive operations. They include:

- New York State regional tourism organizations
- New York State tourism promotion agencies
- Convention and visitor bureaus
- County and municipal tourism departments
- Chambers of Commerce

(See Appendix 9 for more details).

Most tourism promotion organizations are funded by hotel/motel taxes paid by the visitor. Additional revenues for New York's regional tourism organizations, tourism promotion agencies, and convention and visitor bureaus are generated by membership dues, cooperative advertising programs, local general fund allocations and special grants. The matching grants program administered by the New York State Division of Marketing, Advertising and Tourism, budgeted at \$4.8 million in 2005, provides funds to these organizations. The division and its partners have recently initiated some creative marketing programs, including an Underground Railroad program and the "Heart of Arts" program. More of these initiatives are needed.

NEW YORK STATE DEPARTMENT OF TRANSPORTATION (DOT)

The department administers federal funding for transportation-related "enhancement" projects such as waterfront access and historic preservation; develops state bicycle and pedestrian routes; installs and maintains travel information signage along the state's public highways; and maintains the state's Travel Information Gateway website, with maps and information on available modes of travel including canals and docking facilities. DOT also administers the New York State Scenic Byways program, created in 1992 to coordinate recreation and tourism development with resource preservation along road corridors of outstanding regional scenic, natural, cultural or historical significance. Several New York State Scenic Byways cross the Erie Canalway National Heritage Corridor, each offering an alternative travel route to the region's major highways while telling a story about New York's heritage. Three of these - Lakes to Locks Passage, an All-American Road, and the Seaway Trail and the Mohawk Towpath Scenic Byway, both national Scenic Byways - have also been designated as "America's Byways" by the U.S. Department of Transportation. The Erie Canalway National Heritage Corridor has begun to work with DOT on developing a Corridor signage program, and will consider the development of new scenic byways (see Chapter 6, *Interpretation and Orientation*).

NEW YORK STATE THRUWAY AUTHORITY

The Thruway Authority manages upstate New York's primary interstate highway (I-90), which runs within or parallel to the Corridor between Albany and Buffalo. Serving approximately 230 million vehicles traveling more than 8 billion miles each year, the Thruway is the key entry point and circulation route for a majority of Corridor visitors. The Thruway Authority maintains tourism information centers at several travel plazas and interchanges along the system, some of them staffed year-round or seasonally, where travelers can obtain directional assistance and literature about destinations and attractions in New York. The Erie Canalway National Heritage Corridor has begun to work with the Thruway Authority on developing a Corridor signage program.

NEW YORK STATE OFFICE OF PARKS, RECREATION AND HISTORIC PRESERVATION (OPRHP)

The OPRHP administers the New York State Comprehensive Outdoor Recreation Plan and manages many of New York's prime tourism destinations, including state parks, historic sites, heritage areas, and heritage corridors, and manages campgrounds, boat launches, and public golf courses. The agency maintains a website and calendar of events to assist with heritage and recreational trip planning, with detailed information on heritage tourism opportunities available through the State Historic Preservation Office and the state heritage area visitor centers. OPRHP also funds trail development and maintenance and publishes trail maps and guides for boaters, snowmobilers, and winter travelers.

NEW YORK STATE DEPARTMENT OF ENVIRONMENTAL CONSERVATION (DEC)

The department manages the state's fish, wildlife, and marine resources; administers sporting licenses and the New York State Sportsman Education Program; publishes the *Conservationist* magazine; maintains *The Fishing Line*, an internet resource with updated information on state fishing hotspots; operates environmental education and nature centers on protected lands; provides state forest rangers; and funds local projects to improve fishing and wildlife habitat and enhance public access to hunting and fishing areas through easements across private lands.

NEW YORK STATE DEPARTMENT OF AGRICULTURE AND MARKETS

The department supports agritourism development through its Farm Fresh Guide website and guide to farms and farmers' markets, state and county fairs, and a number of programs that help promote and market state agricultural products.

NEW YORK STATE GOVERNOR'S OFFICE FOR HERITAGE NEW YORK

This program provides matching grants and guidelines to develop thematic heritage trails linking interpretive sites to statewide tourism marketing activities, to the state's historical collections, and to each other through outreach and funding for websites, brochures, signage, and kiosks. Five heritage trails have been announced, all with themes linked to the Erie Canalway National Heritage Corridor: the Revolutionary War Trail, Underground Railroad Trail, Theodore Roosevelt Trail, Women's Heritage Trail; and Labor Heritage Trail. The latter two trails are currently under development.

NEW YORK STATE COUNCIL ON THE ARTS (NYSCA)

This agency, devoted to preserving and expanding the state's cultural resources, provides technical assistance and grants to arts and cultural organizations to broaden public access, appreciation, participation, and education. Together with the Arts & Business Council, NYSCA also supports the New York State Cultural Tourism Initiative, which assists communities and organizations in

the promotion of arts and cultural heritage programs designed to attract new visitors and stimulate local economies.

HUDSON RIVER VALLEY GREENWAY / HUDSON RIVER VALLEY NATIONAL HERITAGE AREA

The Greenway Act of 1991 created two organizations to facilitate the development of a voluntary regional strategy for preserving the Hudson River Valley's scenic, natural, historic, cultural, and recreational resources while encouraging compatible economic development and maintaining the tradition of home rule for land use decision making. The Greenway Council, a state agency, works with local and county governments to enhance local land use planning and create a voluntary regional planning compact for the Hudson River Valley. The Greenway Conservancy, a public benefit corporation, works with local governments, organizations, and individuals to establish a Hudson River Valley Trail system, promote the Hudson River Valley as a single tourism destination area, assist in the preservation of agriculture, and, with the Council, works with communities to strengthen state agency cooperation with local governments. The Greenway is the management entity of the Hudson River Valley National Heritage Area, designated in 1996 to recognize, preserve, protect, and interpret the nationally significant cultural and natural resources of the Valley for the benefit of the nation. The national heritage area overlaps with the Erie Canalway National Heritage Corridor in the capital region and provides an important opportunity for collaboration on initiatives such as the development of wayfinding information, interpretive media, and highway signage.

LAKES TO LOCKS PASSAGE

Designated an All-American Road – among the best of the nation's scenic byways – Lakes to Locks Passage was created by merging the Champlain Canal Byway and the Champlain Trail (along Lake Champlain) for community revitalization and tourism development. The Byway's corridor management plan, developed through a partnership of the public and private stewards of the historic, natural, cultural, recreational and working landscape resources along the Champlain Canal, Upper Hudson River, Lake George and Lake Champlain regions, provides a structure to unify the communities along the interconnected waterway. The *Lakes to Locks Passage Marketing Plan* has defined strategic steps to develop the waterway as a national and international destination for visitors. An emphasis on historic resources, coupled with thematic and multi-modal travel, targets the active baby-boomer market. A formal partnership with tourism interests in Quebec has established a framework for international destination development.

PRIVATE / NONPROFIT / OTHER RESOURCES

- *Canal New York, Inc.* is a new marketing and business alliance designed to provide destination marketing, government advocacy, tourism information, research, and other support for tourism efforts in New York's canal communities. Affiliation in this nonprofit organization will be open to the 234 municipi-

palties in the Erie Canalway National Heritage Corridor, as well as corporate supporters.

- *Canal Society of New York State* advocates for the protection and interpretation of historic and natural resources and publishes field guides that document the interrelationships between geology and canal engineering at locations throughout the Corridor. The Canal Society, which hosts the annual New York State Canal Conference, is leading a number of tourism development efforts including the planned Port Byron Erie Canal Heritage Park, a partnership with the Thruway Authority (see above), State Historic Preservation Office, New York State DOT (see above), and Cayuga County.
- *Parks & Trails New York* provides advocacy and technical assistance for trail and park planning and management throughout the state, and is a primary supporter of the Canalway Trail and the annual Cycling the Erie Canal event and Canalway Trail Celebration.
- *Preservation League of New York State* provides grant support, technical assistance, and advocacy for historic preservation activity throughout the state, celebrates outstanding preservation projects through its annual awards, and calls attention to critical preservation needs through its annual Seven to Save program.
- *Arts & Business Council Inc.* collaborates with the New York State Council on the Arts on the Cultural Tourism Initiative Grants Program, which includes an annual workshop series and grants to encourage arts and cultural heritage programs designed to attract new visitors, stimulate local economies, generate new jobs, and create renewed pride in and recognition of the value of the arts and cultural heritage of local communities.
- *State Council on Waterways (SCOW)* advocates for the continued preservation and enhancement of New York's natural and artificial waterways, supports canal-related promotional activities and tourism development, and operates a tour boat, educational programs, and a model program to connect a marina to downtown businesses in Little Falls.
- *Local historical societies and museums* ranging from storefront operations to regional preservation and educational organizations provide a critical link between Corridor resources, interpretation, and tourism development.
- *Commercial businesses and associations*, in addition to providing key visitor services, provide extensive support for tourism promotion agencies, convention and visitor bureaus, and special events.

RESOURCE ANALYSIS

GENERAL TRAVEL AND TOURISM TRENDS

Successful tourism development and marketing is research-based because travelers and travel behavior continually changes; trends impact success. Competitive tourism business models have changed from a primary focus on the product, to a focus on the competition, and now to a focus on the customer.

Twenty-five years ago, visitors took more than one week of vacation travel away from home; in 1985 it was 5.4 nights; in 2003 it averaged 4 days nationally. Much travel today is often a weekend "breakation." Advance trip planning may once

have been 3 months or more, but now ranges from four weeks to one day. Rapidly expanding use of the internet for travel planning and travel purchasing offers new opportunities for travel destinations; 38 percent of park visitors prefer to plan online (*source: Travel Industry Association of America [TIA]*).

While leisure travel numbers have gone up, visitation to national and state parks and other historic sites in the U.S. reached a 10-year low in 2003 (*D.K. Shifflet*). Park visitation has increased slightly over the past decade, but national and state parks' share of leisure visitation is down by 29 percent since 1994 (*Travel Advance*). One response is a national campaign by the National Park Service, the Travel Industry Association of America, and private partners, resulting in increased travel volume for national parks.

Outside forces can have a significant impact on travel patterns. Terrorism, war, and new visa and security procedures have negatively affected tourism (*TIA*). International visitation to the U.S. dropped more than 20 percent in the three years following 2001, employment declined, tax receipts dropped, and many travel organizations were jeopardized. The average U.S. family paid about \$300 more for gasoline in 2004 than in 2003, impacting not only distance traveled for discretionary purposes, but also the relative importance of the perceived value of the destination (*Energy Information Center*). In response to these challenges the tourism industry has increased collaborative partnerships, conducted new research, and sought to become more innovative.

NEW YORK STATE TRAVEL AND TOURISM TRENDS

Recent years' visitor travel patterns show increased auto travel, regional travel, family travel, rural travel, and "American heritage" travel within the U.S. Niagara Falls and New York City remain major magnet attractions for visitors to the state, and the Erie Canalway National Heritage Corridor covers the largest part of the geography and a major transportation route between them. Recreation is also a strong draw for visitors to New York. All of these factors encourage new visitation to the Corridor.

New York ranks fifth in the United States as a state travel destination after California, Florida, Texas, and Pennsylvania, and it ranks first in overnight travel from Canada. For domestic and international traveler spending it ranks third, with \$39.28 billion, after California (\$78.13 billion) and Florida (\$59.85 billion). In 2000, there were 131.2 million person trips to New York, yielding an estimated \$37.5 billion in spending. More than one-quarter of these visitors attended a cultural activity or historic site (*sources: TIA, Impact of Travel on State Economies; Travelscope 2000; D.K. Shifflet; Museum Association of New York*).

The following New York tourism data was collected by tourism region in 2000 and is not closely matched to the Corridor area (*D.K. Shifflet*):

- Automobile travel is the mode of choice for more than 85 percent of visitors to New York destinations. The average one-way distance traveled by overnight leisure visitors to tourism regions in upstate New York (see map of tourism regions in Chapter 1) ranges from a high of 614 miles to the Capitol-Saratoga region, to a low of 307 miles to the Adirondack region, with other regions

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ranging from 400-600 miles. Although auto travel is primarily east-west, there are many opportunities for north-south travel within the Corridor as well.

- Although research shows that day leisure visitor spending is increasing at a more rapid rate than overnight leisure spending in New York, overnight leisure spending is approximately three times that of day visitation. To maximize economic impact, the primary target for the Corridor is overnight visitors staying in paid accommodations. The relative size of this cohort ranges widely in the Corridor, from 33 percent of visitors to the Capital-Saratoga region to 67 percent of visitors to the Adirondack region.
- General overnight leisure travel to tourism regions in upstate New York is initiated primarily in the third quarter (37 to 58 percent), during the watered months of the canal system, followed by the second quarter (23 to 26 percent), the fourth quarter (8 to 27 percent), and the first quarter (8 to 16 percent). Average visitor length of stay ranges from 3.7 to 4.4 days depending on the region.

In general, upstate New York is considered a “drive-to” market due to its limited airline service to primarily smaller, regional airports with few large international hubs. Most tourists are from the U.S. or Canada, with many driving from other east coast destinations such as New York City, Boston, or Philadelphia (see Appendix 9). Canadian visitation has been increasing in recent years, with tourists driving from Montreal or Toronto; a high-speed ferry service between Toronto and Rochester is popular with tourists.

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According to a 2003 economic impact study by the Northern New York Travel and Tourism Research Center at the State University of New York in Potsdam, roughly half (46 percent) of travelers to the state are regional visitors. These visitors come from approximately 50 miles away or less, and are typically day-trippers from nearby urban areas and suburbs. For example, the port city of Oswego, a gateway for Lake Ontario and the Erie Canal, sees regional visitation primarily by car and boat from both Rochester and Syracuse, each located about an hour and a half away.

The two key tourism market segments that match the Erie Canalway National Heritage Corridor tourism product are the *cultural heritage traveler* and the *outdoor recreation* or *soft adventure* traveler. Overall, the cultural heritage travel market is larger (40.7 million participants in the Northeast vs. 16.8 million for outdoor recreation). Within the outdoor recreation category, strong market segments for the Corridor are fitness buffs, outdoors enthusiasts, recreational boaters, nature or ecotourists, and winter recreationists. More information on these two market segments is provided in Appendix 9.

In terms of the Corridor’s historic, natural, recreational, and interpretive resources, cultural heritage tourism and outdoor recreation tourism are intertwined. In terms of marketing, however, these two segments have minimal overlap and will have to be targeted differently. For example, camping is the number one outdoor recreation activity, yet only six percent of cultural heritage travelers utilize recreational vehicles or tents for accommodations, and only six percent are motivated by outdoor recreation, although 16 percent will participate in outdoor recreation activities.

CULTURAL HERITAGE TRAVEL AND TOURISM TRENDS

The majority of cultural heritage travel is motivated by the desire to experience historic and cultural resources in person; special cultural events also influence the choice of destination and the timing of the trip. Cultural and heritage travel target markets for the Corridor include “canal buffs” (who log mileage traveled on or alongside canals, or seek out specific transportation or engineering features) and those interested in Corridor-related themes (religious movements, the Underground Railroad, women’s rights, industrial heritage, the Revolutionary War, etc.).

The Corridor’s historic and cultural resources are extensively described in Chapter 3 of this Plan (*Protecting Our Heritage*), and a thematic framework for understanding these resources is described in Chapter 6 (*Interpretation and Orientation*). Services and recreational features relevant to heritage travel in the Corridor are described in Chapter 5 (*Promoting Recreation*).

In a 2003 national study by the Travel Industry Association of America, cultural heritage visitors are identified as a growing segment of the general traveling population and as high value visitors with higher spending and longer stays than general leisure travelers. Other findings include the following (see Appendix 9 for further research detail):

- Cultural, arts, historical, and heritage activities/events were included in the travel of 81 percent of U.S. adults who took at least one trip of 50 miles or more (one way) away from home in 2002.
- While overall U.S. travel grew 5.6 percent from 1996 to 2002, cultural heritage travel grew more than twice as fast, at 13 percent. One in five (20 percent) of all domestic household trips include historical or cultural activity.
- Travelers ages 35-54 with higher education and/or income generate the greatest number of cultural heritage trips; there is growth in the 18-34 age group.
- Overall spending by cultural heritage travelers rose 17 percent from an average of \$534 per trip in 1996 to \$623 in 2002. Average per trip spending in the Northeast by cultural heritage travelers was \$654, the highest of all regions in the U.S. (all figures in 2002 dollars).
- Cultural heritage travelers have a higher than average affinity for visiting national or state parks and taking group tours. Visiting a designated historic site and/or attending a performing arts event are among the most popular cultural heritage activities, while shopping is the most popular travel activity overall.
- Sixty-nine percent of cultural heritage travelers find that learning something new to enrich their lives makes their trips more memorable, and 57 percent selected travel based on their hobbies or interests. These numbers are even higher for frequent cultural heritage travelers (three or more trips per year).
- Most cultural heritage travel is by automobile, 90 percent includes an overnight stay, and average length of stay is 5.2 nights, most often in paid accommodations. Travel party size averaged 2.2, and has grown in the recent past.
- The most influential source of travel information is word-of-mouth, followed by the internet. A majority of visitors plan their trip within one month or less of traveling, and four in ten extended their stay because of a cultural heritage activity.

New York State Cultural Tourism Initiative (CTI)

A successful program now in its fifth year, the CTI is funded by the Arts and Business Council, Inc. under contract with the New York State Council on the Arts. The program grants approximately \$230,000 per year to arts organizations that partner with tourism organizations to develop and market cultural heritage tourism. The CTI has returned millions of dollars in economic impact to communities and stimulated a climate of collaboration and partnership among hundreds of organizations and government entities. Over 40 multi-organizational, multi-disciplinary, multi-community projects have been funded throughout the state.

According to the World Tourism Organization, heritage tourism is projected to grow as much as 15 percent annually throughout the 21st century. A study performed by the University at Buffalo State University of New York in 2000 found that, on average, heritage tourism generated longer trips and an additional \$166 beyond other types of tourism in upstate New York. These findings point to positive trends for the Corridor.

OUTDOOR RECREATION TRAVEL AND TOURISM TRENDS

Recreation oriented travelers are categorized in a variety of ways: outdoor recreationists, ecotourists, sports tourists, marine tourists, etc. Visitors traveling for recreation are usually referred to in the industry as “adventure travelers” and are categorized as “hard adventure” (e.g., whitewater rafting, snorkeling, mountain biking, etc.) and “soft adventure” (e.g., boating, bicycling, hiking, etc.) travelers.

From available research by the Travel Industry Association of America and an analysis of Corridor recreation opportunities, it is safe to conclude that most Corridor recreation can be categorized as soft adventure. The Corridor’s natural resources, the basis for most of its recreational activities, are extensively described in Chapter 4 of this Plan (*Conserving Natural Resources*). Services and facilities relevant to outdoor recreation in the Corridor are described in Chapter 5 (*Promoting Recreation*).

In the Northeast, 16.8 million adults participated in soft adventure travel activities within the past five years. The top four soft adventure travel activities in the Northeast are camping, hiking, bicycling, and bird- or animal-watching (*TIA, U.S. Forest Service*). Because of population growth, actual numbers have grown for almost all outdoor recreation activities, even where the trends are down. Outdoor recreation is a solidly middle class interest; participation rates decline in income levels below \$25,000 and above \$100,000. Outdoor recreation visitors to the Northeast are the highest spenders, with an average of \$1230 per trip including all soft adventure experiences.

Outdoor recreationists can be categorized as “participants” and “enthusiasts.” The number of enthusiasts is only one-third the number of participants, but enthusiasts represent 70 to 80 percent of travel days, have higher levels of education, spend more, and follow special interest publications. For tourism marketers, enthusiasts are the high value customers, and they are also easier to attract by advertising in special interest publications. Enthusiasts also tend to be more interested in or supportive of environmental stewardship, and will seek out natural resources known to be well-managed and accessible. This makes the Corridor, with its extensive natural resources and high level of stewardship, a good fit for these travelers (see Appendix 9 for further detail):

Fitness Buffs

Fitness buffs like running, walking, bicycling, and hiking. They are very interested in outdoor learning; 75 percent visit historic sites, 59 percent visit visitor centers, 76 percent visit nature centers, 81 percent participate in sightseeing,

and 87 percent participate in waterside activities. Fitness buffs have relatively high incomes and are a high value market segment for the Corridor, which features an extensive network of high-quality short- and long-distance trails, numerous opportunities to visit historic sites or nature centers, and extensive waterside activities. The 348-mile Erie Canalway Trail, the longest continuous pedestrian and bicycle trail in the U.S., is scheduled for completion in 2007; the Corridor already hosts an annual end-to-end "Cycling the Erie Canal" event.

Outdoors Enthusiasts

This category includes highly active outdoor sports enthusiasts, hunters, fishermen, campers, boaters, hikers, and snowmobilers. There is synergy between these activities, particularly between fishing and recreational boating (see below). According to the American Sportfishing Association, New York ranks third in the U.S. for non-resident economic output from sportfishing, reeling in nearly \$585 million in 2001. There is anecdotal evidence that the Corridor could become an international destination for carp fishing, and several communities currently host annual fishing derbies. In general, outdoors enthusiasts are a high value market segment for the Corridor, which features the unique water resources of the canal system, an active snowmobiling community, and extensive off-road trails and backwoods areas.

Recreational Boaters

Recreational boating in the Corridor involves vessels ranging from large and small powerboats, houseboats, waterskiing, and personal watercraft, to non-motorized craft such as kayaks, canoes, rowboats, rowing shells, sailboards, and sailboats. Although "paddling" (kayaks, canoes, rowboats) attracts more participants throughout the Northeast, motor boats are more common on most segments of the New York State Canal System, partly because of the large scale, long distances, and commercial traffic of the canals, and partly because of the wide variety of motor boating opportunities, which include tour, excursion, and rental boats as well as personal vessels.

Recreational motor boating attracts adventure travelers with higher levels of income and education. Nationally, recreational motor boating increased 39 percent between 1982-83 and 1994-95, and it is a popular activity for 55 percent of hunting and fishing aficionados, 56 percent of highly active sports enthusiasts, 25 percent of fitness buffs, 22 percent of nature lovers, and 38 percent of fishing enthusiasts. Unlike participants in most other recreational activities, more than 20 percent of recreational boaters are over 50 years old. New York *resident* motor boat owners are identified as 91 percent male with no children living at home, an average age of 55 years, and a household income of \$65,000. The vast majority live upstate, 65 percent own a boat sized 16-25 feet, and two-thirds of them fish.

Boating, although not as large in participant numbers as some other recreation categories, is an important activity for the Corridor. It is a significant contributor to the Corridor's living heritage, encourages interest in the canal system itself, and attracts people canalside to participate in boating or watch boats lock

through the canals. Although Corridor boaters are primarily from upstate New York, the opportunity exists to attract non-local visitors to rent boats for canal excursions, and to attract “Great Loop” cruisers making the circuit of Eastern U.S. inland waterways. With under-utilized capacity on the canal waterways, there is excellent growth potential (see Chapter 5, *Promoting Recreation*). Recreational boaters are a very high value market segment for the Corridor.

Nature Tourists or Ecotourists

The International Ecotourism Society defines its mission as “responsible travel to natural areas which conserves the environment and sustains the well-being of local people.” Nature lovers enjoy walking, birding and wildlife watching, nature study, sightseeing, and going to visitor centers. Total estimated U.S. participation is 26.6 million, and they are two-thirds female. The U.S. Fish and Wildlife Service estimates bird/animal watching participants at 24 million nationwide, spending \$18 billion per year. The demographics of ecotourists are particularly synergistic with the intent, experience, and offerings of the Corridor. They are a high value market segment for the Corridor.

Winter Recreationists

From a tourism economic impact perspective, winter visitors are highly valued because they can fill otherwise unused capacity in lodging, dining, and shopping venues. Growth rates for some of the most popular winter recreation activities are 92 percent for snowshoeing, 34 percent for snowmobiling, and 22 percent for snow skiing. In the Corridor, interest in ice fishing and winter steelhead fishing has been increasing in recent years. Outdoor recreationists classified as nature lovers and outdoors enthusiasts have a high interest in snow and ice activities; snowmobiling is a popular activity among 12 percent of highly active sports enthusiasts and 10 percent of those with high interest in hunting and fishing. New Hampshire 2003 state data on snowmobiling shows high spending per day, with more than 10 percent of the state’s annual visitor spending coming from snowmobilers. If comparable trends exist in New York, this experience demonstrates a high value market segment for the Corridor.

GUIDELINES FOR HERITAGE DEVELOPMENT

Reduced travel overall, as well as reduced prices for accommodations, have decreased the revenue from hotel/motel taxes, a significant portion of which are dedicated for tourism marketing. Private sector tourism businesses are similarly impacted. Additionally, the prerogatives of safety, health, and education spending continue to challenge the ability of government to make up the loss of hotel/motel tax funding with public support for tourism development. To make the most of limited funding, heritage tourism destinations in the Erie Canalway National Heritage Corridor must:

- collaborate and reduce duplication of effort;
- focus on enhancing the visitor experience of the heritage resources they have;
- use research to target their audiences and measure the results; and
- strategically market themselves to reach and motivate those audiences.

COORDINATION

Despite a wide variety of excellent tourism marketing being conducted by multiple state and local organizations, it is universally acknowledged that current marketing efforts for Corridor destinations are fragmented and that there is a lack of coordination. No entity exists to market the Corridor as a whole.

The existing tourism promotion system in New York, as in most states, is geographically based. Because tourism promotion is predominantly funded by a local hotel/motel tax which is collected on a municipal and/or county basis, municipal and county tourism promotion organizations focus on putting heads in *local* beds. Other primary sources of funding include county general fund allocations; membership dues; and support from the New York State Canal Corporation and the Empire State Development Corporation Division of Marketing, Advertising and Tourism. The Canal Corporation's promotions focus on the waterways and adjacent Erie Canalway Trail, although it is expanding its efforts to include more landside recreation.

The New York State Division of Marketing, Advertising and Tourism does feature the canal system in promotional efforts, but its jurisdiction is the entire state with all of its varied tourism products. The division oversees eleven tourism regions throughout the state, funded primarily through state grants, funds from the tourism promotion agencies in their region, and self-funded efforts such as advertising sales. The regions' marketing efforts are significantly underfunded. The Erie Canalway National Heritage Corridor crosses six of these tourism regions and their respective organizations (see Appendix 9).

While these agency divisions and regional and county geographic jurisdictions are individually logical, they do not make tourism marketing effective for the multi-jurisdictional destination that is the Erie Canalway National Heritage Corridor. Tourists are generally unaware of, and unmoved by, governmental boundaries; despite the efforts of local destination promotion organizations, tourists rarely stay in one location during an extended stay. In addition, locally focused or canal-focused tourism marketing efforts do not effectively communicate the breadth of experiences available to Corridor visitors, particularly the sophisticated heritage and recreation travelers who seek a variety of experiences.

Although some communities have begun to work together to promote themselves on a regional basis, many communities remain unaware of or out of step with marketing efforts going on down the road, resulting in inefficiencies that frustrate taxpayers and local tourism businesses and inconsistencies that frustrate tourists. Marketing the whole Corridor as a national and international destination would be cost-effective; avoid duplication of effort; create consistency of image, brand, and message; and create a much more compelling destination with a higher expectation of economic success. At the same time, coordination of event planning – perhaps through the designation of an annual week or weekend of Corridor-wide celebrations, anchored by a signature event, with enhanced promotions and marketing – would help put the region “on the calendar” of travel planners and sustain year-round interest in Corridor tourism opportunities.

Marketing the whole Corridor as a national and international destination would be cost-effective; avoid duplication of effort; create consistency of image, brand, and message; and create a much more compelling destination with a higher expectation of economic success.

The Erie Canalway National Heritage Corridor provides the opportunity for multi-jurisdictional and multi-disciplinary management of tourism development and marketing efforts, with more extensive cross-promotion of tourism products. The Corridor Commission does not seek to duplicate the efforts of existing organizations. Marketing of local and regional tourism destinations remains necessary to help prospective tourists plan their visit once they decide to come to the Corridor. Intra-Corridor marketing and marketing of individual destinations and sub-regions should remain primarily the purview of existing organizations, while new marketing efforts with broader reach are pursued by the Corridor.

A key partner for the Corridor in this effort should be a new Corridor-wide convention and visitors bureau (CVB) or similar organization, supported by independent sources of funding. Such a partner would provide a much-needed single point of contact between the Corridor and residents, visitors, and other tourism development and marketing organizations, helping to coordinate cross-jurisdictional issues and programs by:

- providing leadership and vision to leverage the creativity and energy of existing tourism development and marketing efforts, creating opportunities for local organizations and communities to participate as they choose;
- meeting regularly with tourism professionals throughout the Corridor for advice and counsel, and providing a forum for discussion and idea creation;
- acting as a liaison between tourism marketing efforts and Corridor preservation, conservation, recreation, interpretation, and economic revitalization efforts; and
- providing linkage to the promotional activities of the Hudson River Valley National Heritage Area, Lakes to Locks Passage, and National Park System units within the Corridor.

A key partner for the Corridor should be a new Corridor-wide convention and visitors bureau (CVB) or similar organization, supported by independent sources of funding.

The Erie Canalway National Heritage Corridor Commission will seek to collaborate as appropriate with Canal New York, Inc., a new nonprofit organization. The proposed mission statement of Canal New York, Inc. is “to serve as the one generally accepted private sector entity dedicated to tourism, marketing, legislative advocacy, and business collaboration to support existing and new business opportunities within New York’s canal communities.”

PRODUCT DEVELOPMENT AND VISITOR INFRASTRUCTURE

Successful heritage tourism is based first and foremost on the quality of historic, cultural, natural, recreational, and interpretive resources. For heritage tourists, quality constitutes more than the authenticity and integrity of these resources; it also means diversity, consistency, cohesiveness, continuity, and comprehensibility. Repeat visitation is unlikely if these attributes are not met. Moreover, contextually sensitive tourism efforts must carefully balance visitation, resident quality of life, and preservation of resources with the development of amenities for both visitors and residents to enjoy.

For tourism to be sustainable as an economic generator, the Corridor and its individual communities must attract repeat visitation. To generate repeat visi-

tation, the “tourism product” must be periodically renewed; heritage resources must be enhanced, and the visitor experience of them must be continually improved and refreshed. The Corridor is in a position to encourage such an effort through its support for:

- enhanced preservation and interpretation of historic resources;
- expanded recreation and off-season opportunities;
- increased linkages between destinations; and
- improved quality and consistency of visitor services.

Enhanced Preservation and Interpretation

The cultural heritage travelers described in the preceding Context section of this chapter tend to be sophisticated and demanding of their travel experiences; they can readily appreciate the difference between “themed” attractions and authentic historic resources that have maintained their integrity. Because these travelers also tend to be well-educated and to travel with other adults, they often seek out diversity in order to satisfy multiple interests and affinities. Given the authenticity, integrity, and diversity of its historic resources, the Erie Canalway National Heritage Corridor is in a strong position to attract additional heritage tourism.

However, many resources remain inaccessible to visitors or vulnerable to deterioration, inappropriate preservation practices, and, ironically, some of the same development that is needed to attract tourism (see *Visitor Services* below). At the same time, both residents and visitors have perceived a lack of consistency in the quality of heritage tourism sites, in terms of both the comprehensiveness or effectiveness of preservation efforts and the provision of interpretation and visitor services. Visitors currently walk away from many heritage sites without having a clear sense of how the sites are connected to the larger Corridor story, without feeling that they have truly experienced the history of the site, or without knowledge of similar or related sites down the road, and therefore without a compelling reason to extend their stay or return for another visit.

All of these are reasons why the preservation of cultural landscapes – entire geographic areas associated with specific events, activities, or people – are as important to Corridor heritage tourism as the preservation of individual historic resources such as buildings or vessels. Well-preserved patterns of settlement, land use, or transportation help convey the strong sense of place that cultural heritage travelers will seek out and revisit. For example, a 19th century industrial district will have a stronger sense of place if it includes canalside elements of power generation, factory or mill buildings, worker and management housing, all connected by a continuous street grid uninterrupted by major non-contributing elements such as entertainment centers or big-box retail stores.

While well-preserved historic resources can in some ways tell their own stories, most cultural heritage travelers seek out in-depth information and stories that connect heritage sites to people and events, to the landscapes surrounding them, and to the broader sweep of history. The Corridor’s historic resources have great ability to evoke history in a vivid and memorable way, in part because the Corridor’s relevance as a “river of commerce and culture” has continued to

Tourism and Community Quality of Life

Communities promote tourism ultimately to improve the quality of life for residents; the more quality of life is improved, the more people will want to live and work in, and visit, a community. Tourism, in turn, supports amenities for residents. Residents alone cannot support many enjoyable community activities. For example, many gourmet restaurants cannot survive on residents’ once-a-year anniversary dinners. They are supported by the volume of tourist dollars that, in turn, makes them available for residents’ enjoyment.

the present day and will continue into the future. While it is important for the interpretation of historic resources to tell local stories in local styles – thereby satisfying cultural heritage travelers’ demands for integrity, variety, and strong sense of place – it is also important for each resource to provide a “gateway” to the larger story of the Corridor, encouraging visits to other sites of interest and generating an understanding of the Corridor as a veritable treasure trove of history and culture. Where appropriate, an explanation of the three primary phases of canal development – the original, enlarged, and 20th century canal systems – should be used to help orient visitors within the Corridor’s historical timeline.

One of the Corridor’s most important historic resources is its intangible cultural heritage – the traditional and contemporary arts and folkways of people living and working alongside the waterways. Cultural programming – performing arts, readings, educational activities, reenactments, guided tours, festivals and special events – does more than preserve historic resources; it helps bring historic resources to life. For many visitors, these activities are a central part of the heritage tourism experience, bringing people together and providing an opening to broader participation in community life for residents and visitors alike. Cultural programming is an important part of tourism development for the Corridor because it contributes simultaneously to community identity-building, interpretation of historic resources, and repeat visitation by heritage tourists and others. For example, many canal-related events in the Corridor have become settings for annual get-togethers such as family reunions.

Tourism Product Development to Tourism Marketing Success

The Tonawandas Gateway Park was developed into a downtown waterside attraction through significant capital investment. The annual eight-day Canalfest draws 500,000 people. The Cultural Tourism Initiative, supported by the Arts and Business Council, Inc. and the New York State Council on the Arts, funded the marketing of a summer-long series of music events targeted specifically to boaters. This successful program drew visiting boaters from throughout the Great Lakes to the Tonawandas at the “Western Gateway to the Erie Canal.”

Strategies to enhance preservation of the Corridor’s historic resources, including cultural landscapes, arts, and folkways, are outlined in Chapter 3, *Protecting Our Heritage*. Strategies to enhance interpretation, including educational and cultural programming, are outlined in Chapter 6, *Interpretation and Orientation*. Strategies to increase linkages between heritage sites in the Corridor are discussed below and in Chapter 6.

Expanded Recreation and Off-Season Opportunities

There will always be some degree of seasonality in Corridor tourism. The canal system is officially open to navigation from May 1 to November 15, and closed to through-boaters the rest of the year. Weather-related closings and other interruptions in navigation are posted on the Canal Corporation website. The non-navigable months are also the slowest for the upstate New York tourism industry in general. Most of the outdoor recreationists described in the preceding Context section of this chapter will be attracted primarily to the Corridor’s spring, summer, and fall activities, and recreational opportunities in the Corridor favor these seasons. However, communities need jobs and economic activity throughout the year, and the Corridor offers more to visitors than boating.

Natural resources are the basis for most outdoor recreation activity, and particularly for outdoors enthusiasts, eco-tourists, and winter recreationists. For these visitors, the continuity and accessibility of natural resources – the ability to find and move through trails, waterways, parks, and protected areas, perhaps for long distances and without modern intrusions – is almost as important as the

environmental quality of the resources. Preservation of cultural landscapes (see *Enhanced Preservation and Interpretation*, page 8.17) is valued in part because it encourages new development in existing town centers, helping to conserve existing natural areas, open spaces, and scenic views. Strategies for enhancing continuity of and access to natural resources in the Corridor are provided in Chapter 4, *Conserving Natural Resources*. Strategies for promoting recreation year-round are provided in Chapter 5, *Promoting Recreation*.

The “I LOVE NY” campaign is addressing the seasonality issue through winter promotions based on recreation – particularly skiing and snowmobiling – and the positioning of upstate cities and villages as resort areas surrounded by nature. A number of cities in the Corridor have also sought to increase winter activity among both residents and visitors with campaigns highlighting recreational activities such as ice skating, spectator sports such as hockey, outdoor arts such as ice and snow sculpture, and discounted shopping, dining, and admissions to cultural sites or performances. In general, efforts to enhance local quality of life by providing residents with centrally located activities during the winter months are also good for tourism if they add life to downtown streets.

The Corridor’s initiatives to expand preservation and conservation activity, focus new development on existing town centers, and promote recreational development will help support existing efforts to boost off-season visitation. Opportunities to develop new cross-country skiing and snowmobiling trails should be pursued in coordination with efforts to develop more all-season lodging properties. Innovative ways to integrate the canal system into winter tourism, such as converting short in-town canal segments to ice skating rinks or providing guided tours of the Canal Corporation’s winter maintenance operations in full swing, should be considered.

Increased Linkages Between Destinations

Other than visiting friends and relatives, the major motivation for travel is the experience itself. *Perceived value* of the experience will dictate how far visitors will travel, how long they will stay, and how much they will spend. Although the size and diversity of the Corridor would suggest that the number of possible visitor experiences is extraordinary, the reality is that many visitors will see only a small part of the region, even as repeat visitors. Although some residents have expressed frustration that the Corridor is so large and diverse that there is no way to tell the whole story in one place, this is a good thing from a tourism perspective; it offers a reason to travel to more of the Corridor.

Tourism development planners must consider what creates a critical mass of attractions or a powerful enough “experience magnet” to generate visitation in volume sufficient to create economic impact. Smaller sites and communities without a “critical mass” of attractions or heritage resources can band together thematically to create a “magnet” or link to larger magnet sites. Communities along less populated segments of the canals can collaborate on shared development goals and strategic siting of key visitor services to attract boaters, drivers, bicyclists, and through hikers. The Erie Canalway National Heritage Corridor

Marketing Linkage Between Cultural Heritage Organizations

Legacies and Landmarks: Museums of the American Experience is a marketing collaboration of four museums and the Greater Rochester Visitors Association (GRVA). George Eastman House, Genesee Country Village and Museum, Susan B. Anthony House, and the National Women’s Hall of Fame work with GRVA to attract both motorcoach and individual leisure travelers to the western Corridor region. Now in its fourth year, the project was catalyzed by the state Cultural Tourism Initiative through the Arts and Business Council, Inc. and the New York State Council on the Arts.

provides an interpretive and marketing “umbrella” that allows communities large and small to collaborate and attract more visitors than they could by acting alone. A primary partner for the Corridor in this effort will be the New York State Office of Parks, Recreation and Historic Preservation, which has already encouraged considerable linkage efforts through its Heritage Areas Program and its Comprehensive Outdoor Recreation Plan.

Because the Corridor includes communities and heritage resources distant from the canals as well as waterfront communities, enhanced physical linkages between heritage resources are needed, including directional and confirmational signage, trails and designated byways, and intermodal connections. A consistent and comprehensive wayfinding system for those traveling by automobile is a critical goal for the Corridor. Visitor itineraries or journeys organized by geography or theme can also provide this linkage, with loops originating in larger communities with accommodations and traveling through smaller communities with individual sites of interest. Strategies to enhance both thematic and physical linkages within the Corridor are outlined in Chapter 6, *Interpretation and Orientation*.

A basic conceptual link between individual communities and the Erie Canalway National Heritage Corridor as a whole can be established through a program to provide a kind of affiliate status to communities that agree to support the Corridor vision and goals. These affiliated communities can be recognized with official Corridor signage at major entry points, and receive ongoing tourism development and marketing assistance from the Corridor Commission and its partners. Strategies to develop an affiliate community program are outlined in Chapter 9, *Implementation*.

Linkage Between Canal and Downtown Businesses

To connect boaters with downtown offerings, Phoenix, NY has developed an immensely popular nonprofit program called the “Bridge House Brats.” Youth ages 6-21 must qualify for and are trained to be Brats. Boaters can order from local restaurant menus at the Brat Shack or radio ahead, and meals are delivered to the dock. The Brats also maintain a small museum in a restored lift bridge operators’ tower with exhibits on local waterfront culture. Clever and innovative, the program generates revenue for downtown businesses, tip income for youth, extraordinary service for boaters, and goodwill for the community.

At the national and international level, conceptual linkages can also be developed to connect the region with the Great Lakes and Midwest, with Canada, with New York City, with European nations that sent sons and daughters to build the canals and put down new roots, and with other heritage destinations and inland waterways – such as the “Great Loop” around the eastern U.S. – that are central to the American experience. Potential visitors should understand the Corridor as both a physical and conceptual link between New York City and Niagara Falls, New York’s most popular tourism destinations. These linkages are an important part of the Corridor’s positioning (see page 8.25).

Improved Quality and Consistency of Visitor Services

The capacity, location, and quality of some tourism infrastructure within the Corridor fall short of current needs. Availability of lodging, dining, retail, information, and support services, such as recreational outfitting and rentals, is limited in some areas. A significant number of services are seasonal, and many are provided by small businesses that have had little capital investment over the years. General strategies and models for heritage business development are provided in Chapter 7, *Economic Revitalization*.

Lodging options in the Corridor generally fall within two categories – economy chain hotels, located almost exclusively in urban areas or alongside their high-

way approaches; and a larger number of independently owned bed and breakfasts, scattered among the region's villages and hamlets, particularly those with scenic value or waterfront linkages. Whereas the region's hotels generally cater to business travelers and those traveling to visit friends and family, providing family discounts and amenities such as pools or event spaces, bed and breakfast properties generally cater more directly to cultural heritage and outdoor recreation travelers, with amenities such as bicycle or boat rentals and tours.

Because the bulk of economic impact from tourism comes from overnight visitors, communities without lodging are sometimes left out of opportunities for tourism development. However, it is not necessary or even desirable that every community has a full complement of services. The greatest volume of visitation to the Corridor is by car, and most services are accessible within a reasonable driving distance from any destination. Communities without accommodations can benefit economically from day visitors through retail, dining, entertainment and attraction expenditures.

The Corridor may be considered as a collection of overlapping sub-regions, each defined by a particular type of visitor, within which individual communities can be assisted to determine what gaps they may have and whether to fill them with new development or by partnering with neighboring communities. The Corridor will support research that further identifies the needs and destinations of targeted visitor audiences (see Context section above) and the current capacities and future growth potential of existing visitor services such as year round rooms, seasonal lodging, campsites, recreational rentals and outfitting.

Many heritage and recreational sites within the Corridor are currently at various stages of visitor readiness or ability to service their identified carrying capacity. Guidelines for what constitutes visitor readiness – clarity of signage, predictable hours of operation, availability of restrooms and parking, handicapped accessibility – should be developed and disseminated. Strategies for improving visitor use management through recreational development are outlined in Chapter 5, *Promoting Recreation*. Visitor readiness criteria are also part of a planned certification program for the Corridor, designed to incentivize improvements for preservation and interpretation, as outlined in Chapter 9, *Implementation*.

Visitor information is a particularly important part of the visitor service infrastructure and a key to establishing and maintaining both physical and conceptual linkages between Corridor sites and communities. Corridor support for visitor travel planning must be customer-driven and user friendly, maximize the use of research and technology to intercept visitors and potential visitors at key moments in the decision making process, and provide simple and encouraging mechanisms for purchasing Corridor travel products. Different visitor information is needed at various points in the travel process:

- when the visitor is considering travel and choosing a destination;
- when the visitor is looking for specific travel experience information;
- when the visitor is looking to purchase travel products;
- when the visitor is in the Corridor;
- when the visitor is experiencing various sites; and
- when the visitor returns home.

Community Lodging Development

Because economic impact is increased significantly by overnight stays, some Corridor communities without lodging, especially communities accessible to boaters, may wish to develop some accommodations capacity. One of many interesting possibilities worth exploring is the idea of creating a preservation-oriented small business program to stimulate the renovation and conversion of canalside buildings with historic charm into lodgings. The development of a series of such small properties could be run as a collaborative chain of "Canal Host Houses," independently owned but with a common reservation system and marketing program. A portion of the revenue could be re-directed into a revolving loan fund. Such a program would provide visitors by boat or car with additional places to stay, preserve and restore existing buildings, create new small businesses, provide jobs, and generate new economic impact to communities. A potential partner for this program, such as the Cornell School of Hotel Administration and its Center for Hospitality Research, could provide technical assistance to help identify properties, develop a business model, and train new owner-managers.

Strategies for providing consistent wayfinding and interpretive information are outlined in Chapter 6, *Interpretation and Orientation*. Critical elements of an effective visitor information system for the Corridor include:

- a comprehensive, “one-stop” Corridor-wide trip planning website with travel booking mechanism; the ability to search for sites and events by theme, activity, date, and region; inquiry response; and periodically updated information that can be used in local community press releases, including downloadable images;
- consistent and coordinated directional signage and other wayfinding devices such as maps and scenic byways;
- a suite of communications materials with a unified design, in formats suitable for coordination with other organizations’ marketing efforts, including single-sheet and trifold brochures, brochure shells, folders, etc.;
- expanded distribution or display of visitor information at high-volume sites such as attractions, hotels, Thruway rest areas, and shopping centers; and
- enhanced interpretive information at heritage sites, visitor centers, and roadside or canalside pulloffs for scenic views.

Visitor centers can significantly enhance the quality of the tourism experience by providing staff assistance with travel planning and information on the full spectrum of tourism options for a city or region. Too often, however, visitor centers are used as high-visibility signs of public investment in tourism development and are not backed up by necessary improvements to historic sites, interpretive resources, physical and conceptual linkages between sites, other necessary visitor services, or marketing. As stand-alone structures with static information displays and no direct connection to local historic resources, visitor centers can drain local tourism development funds without generating significant benefits. However, as community-centered amenities designed to accommodate cultural programming and interactive, updatable multimedia displays, fully integrated into a broader system of “gateways” to the Corridor experience, visitor centers can help guide a broad audience to stories and sites of interest.

RESEARCH AND EVALUATION

For tourism development and marketing in the Corridor to be effective, baseline data must be established and regular research must be conducted to refine marketing focus, measure success, and secure future funding. Some existing data on Corridor economic conditions and tourism levels is difficult to access, incomplete, inconsistent, or collected infrequently, complicating efforts to track progress and redirect efforts. The geographic breakdown of currently available research does not match the Corridor’s boundary; thus, estimates directly relevant to the Corridor often have to be extrapolated. Spending data currently obtained by the Empire State Development Corporation for New York State under a contractual agreement with D.K. Shifflet & Associates cannot be translated to the geographic boundary of the Corridor.

Some available data provides excellent insight into particular market segments, but must be translated into broader tourism uses. For example, Canal Corporation marketing efforts are restricted primarily to the upstate New York region, resulting in large numbers of local resident recreational users. While this is a

positive outcome, it does not add net new revenue to Corridor businesses (see *Market Assessment and Targeting* below). Similarly, much of the currently available data on recreational activity in the Corridor is based on resident data. It cannot be assumed that residential recreational data and tourism recreational data lead to the same conclusions.

The key assessments to determine tourism success are visitor volume and spending. This data provides on-going accountability and feedback to help continually refine tourism efforts. Some data on visitation and economic impacts could be tracked based on hotel/motel tax collections, but this data is collected by counties. In general, useful data cannot be secured on a local level; where it can be secured, many local tourism marketing organizations are too small and underfunded to be able to utilize it effectively. Collecting information on visitor satisfaction and perceived value is also critical to help tourism developers target their investments in product development. Much of this information may be anecdotal or informal in nature.

Corridor support for tourism research and evaluation will include commissioning custom research reports targeted to the Corridor's geographic boundary in order to help ascertain basic Corridor visitation trends, develop better models of targeted visitor audiences, and measure the effects of Corridor tourism development and marketing efforts, including economic impacts. The Corridor will also support regional collection and interpretation of information about levels of visitor readiness and availability of visitor services (see *Visitor Services* above).

MARKETING

Successful tourism marketing is sophisticated, fast paced, flexible, research-based, customer-driven, and results-oriented; it connects with potential visitors, helping them to see the relevance of the destination to their own lives. Unsuccessful tourism marketing is topheavy with information, stodgy, cool-idea-based, product-driven, and process-oriented; there is simply too much competition to expect potential visitors to read lists and descriptions of attractions, hotels, etc., and hope they will visit. Just because a destination is historically significant, valuable, and loved by residents, does not mean that people will visit.

There are four components to a successful Corridor marketing program:

- market assessment and targeting;
- positioning;
- marketing image; and
- communication.

Market Assessment and Targeting

The Corridor's tourism marketing effort can succeed by using research to identify potential or likely visitors and, more specifically, high value customers. Tourism economic impact may be generally determined by multiplying spending per person, per day, by the number of days. (A more complex and accu-

The geographic breakdown of currently available research does not match the Corridor's boundary.

rate formula that accounts for both day visitors and overnight travelers staying in both paid and unpaid accommodations is available from the Empire State Development Corporation.)

The greatest economic impact to the Corridor as a whole will come primarily from overnight visitors bringing net new dollars from outside the region into the Corridor. Overnight visitors spend approximately three times what a day visitor spends, thus making overnight visitors in paid accommodations the primary source for economic impact from tourism. For this reason, they should be the major (but not only) focus in marketing the Corridor as a destination in order to produce the desired economic gains.

Technically, a traveler from Albany to Buffalo fits the standard definition of a visitor – being more than 50 miles away from home – and is certainly counted as such by the destination. However, as far as net economic impact to the Corridor is concerned, that traveler is actually a resident. Many basic Corridor tourism marketing efforts will spur intra-Corridor travel and spending, and this will be helpful to all communities. In general, however, the economic goal of Corridor tourism marketing efforts should be to encourage overnight stays and to attract *net new* impact to the Corridor from more than 50 miles outside the region.

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Targeting includes geographic, demographic, and psychographic (special interests) targets. Basic marketing tenets are to sell to strengths and to “fish where the fish are.” Targets for Corridor tourism marketing include both *business travelers*, who may make incidental visits to heritage sites and other attractions in the vicinity of their business, and *leisure travelers*, including:

- Visiting friends and relatives: Approximately half of New York visitors travel to visit friends and relatives.
- General vacation travel: Concentrated in the Adirondack region (52%) and the Thousand Islands-Seaway region (30%), with most other tourism regions averaging 10-14% general vacationers.
- Getaway travelers: Weekend travel and special event motivated travel ranges from 10-17% of overnight leisure travelers within the Corridor.
- Recreationists (hiking, bicycling, boating, camping, birdwatching, etc.).
- Cultural and heritage travelers.

Approximately 40 percent of visitation within New York is from state residents, many of them traveling along the New York State Thruway. Although auto travel is primarily east-west, there are good opportunities for north-south travel to the Corridor as well, including the Northway (Interstate 87) from Montreal. The Corridor also stretches between the largest visitor magnets in the state: Niagara Falls, Adirondack Park, and New York City. Tourism marketing for the Corridor should also consider markets with direct access to the major airports in Buffalo, Rochester, Syracuse, and Albany as well as the cruise ship and ferry terminals in Buffalo and Rochester.

International travelers are too often overlooked by efforts to target Corridor tourism marketing. Although international visitation to the U.S. has not yet recovered to pre-2001 levels, the strengthening of foreign currencies relative to the U.S. dollar, the resurgence of New York City as an international destination,

and the proximity of the Corridor to Canadian destinations and population centers such as Toronto and Montreal present significant opportunities. In particular, Europe represents a significant potential canal boating market.

Positioning

Successful positioning of a tourism destination results from a confluence of the appeal of the destination, the memorability of the marketing image, finding a point of uniqueness, and finding a fit with the targeted customer, all used consistently. To prospective visitors, the Corridor is one travel choice among many competitors for their attention. Competitors must be identified and examined from a number of perspectives such as geographic draw, thematic draw, experience/activities offered, and peak seasons in order to develop and deliver a consistent message to prospective visitors.

Examples of competitors for the Erie Canalway National Heritage Corridor include:

- **American Icons**, e.g., Statue of Liberty, Grand Canyon, Washington, D.C., San Francisco, Disney World/Land, Philadelphia monuments, Boston Freedom Trail, St. Louis Arch
- **New York** destinations and activity centers, e.g., Niagara Falls, Adirondack Park, Catskills, New York City, Corning Glass Museum
- **Destination Clusters**, e.g., Maine Coast (scenic beauty, recreation), Cape Cod (scenic beauty, recreation), Florida beaches (sun, sand, surf)
- **Linear Destination Experiences**, e.g., Appalachian Trail, Blue Ridge Parkway, Mississippi River, Hudson River, Route 66
- **Thematic Destinations**, e.g., Civil War, Revolutionary War, Underground Railroad, Women's Rights
- **Other U.S. Heritage Canals**, e.g., Illinois & Michigan, Ohio & Erie, Delaware & Lehigh - primarily regional draws, many non-navigable

Some potential visitors - including international visitors - will be drawn by the iconic stature of the Erie Canal. Others will be drawn by the Corridor's close association and proximity to other New York destinations, particularly Niagara Falls and Adirondack Park. Cultural heritage travelers will be drawn by the Corridor's prominence as a thematic destination, and some will be drawn by its stature as site of the nation's preeminent heritage canal and one of its top linear destinations. Outdoor recreationists will be drawn by the Corridor's diversity of recreational opportunities.

This positioning should be central to Corridor advertising, promotions, travel trade and consumer shows, familiarization trips, and public relations, as well as efforts to foster cross-promotion with other destination marketing organizations and sites.

Marketing Image

A marketing image is not a logo or an interpretive theme; it is an underlying marketing identity that can be translated by an advertising agency into photographs, copy, slogans, and marketing campaigns. A marketing image is intangi-

ble yet must be compelling enough to psychologically and emotionally motivate people to spend the time and resources to travel. It must be carefully designed to reflect reality, to provide a unique positioning relative to competitor destinations, and to stimulate desire to visit.

The marketing question is not “Why is the Erie Canalway National Heritage Corridor nationally and historically significant?,” but rather “Why should I go there?” There are other canals and heritage corridors and other important historic sites. Given the Corridor’s size and diversity, its marketing image cannot be too specific, nor can it be just descriptive; it must be emotionally resonant to people today. It must also fit a variety of complementary uses in addition to tourism marketing, including direct efforts to boost economic development and residents’ self-identification with local heritage.

The Erie Canal is an American icon, a national treasure and a “must-do” experience for heritage and recreation. It changed America and changed the way Americans see themselves. A visit to the Erie Canalway National Heritage Corridor will change the visitor’s perspective. The Corridor both reflects and inspires the American experience: determination, innovation, ingenuity, capability and the challenging of frontiers. It was then, and is now, an American catalyst for hope and progress.

Communication

There are two critical aspects of communication in support of Corridor tourism development: public outreach to residents and stakeholders of Corridor resources, and marketing to potential visitors to the Corridor. While there are important distinctions between these two efforts – public outreach aims at people within the Corridor; marketing aims outside the Corridor – there are some things they will have in common. Both should:

- Speak to target markets. Although public outreach efforts will necessarily be broader in nature, addressing all Corridor residents, they should seek to strike a chord with cultural heritage and outdoor recreation enthusiasts within the Corridor. Public outreach to target markets will provide a constituency for preservation, conservation, recreation, and interpretation enhancement efforts, as well as a local base of activity to support appropriate use of Corridor heritage resources and related amenities.
- Strengthen the Corridor’s positioning. Both residents and potential visitors should have a strong sense of the Corridor’s contribution to the American experience. Public outreach efforts can encourage residents to develop a sense of “neighborhood pride” that encompasses the broader significance of the Corridor and the importance of their local neighborhoods as part of a larger whole that stands alongside the nation’s key icons and destinations.
- Reiterate and reinforce the marketing image. The marketing image doesn’t just work for advertising; it is the core element of the National Heritage Corridor’s mission.