

Partnering for Tourism Development in the Southtowns of Erie County

An Assessment of
Strengths, Weaknesses, Opportunities and Threats



June 2006



Institute for Local Governance and Regional Growth
University at Buffalo, The State University of New York
Beck Hall, 3435 Main Street,
Buffalo, NY 14214-3004

Phone: 716 829-3777
Fax: 716 829-3776

Web: regional-institute.buffalo.edu
E-mail: regional-institute@buffalo.edu

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



Table of Contents

I.	Summary.....	2
II.	Background.....	3
III.	The Big Picture.....	5
IV.	Asset Development.....	8
V.	Information Management.....	17
VI.	Complete Visitor Experience.....	20
VII.	Governance and Financial Support.....	22
VIII.	Conclusion.....	24

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



I. Summary

The University at Buffalo Institute for Local Governance and Regional Growth has completed the following analysis of the current picture of tourism in the Southtowns area of Erie County, and assessment of opportunities for and threats to tourism development in the area at the request of the Southtowns Community Enhancement Coalition, a consortium of seven Erie County towns and villages. The study is based on a review of the tourism asset inventory conducted by the Institute, as well as additional research, and is intended to serve as the foundation for a broader community-based, strategic planning effort for advancing tourism.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



II. Background

Nestled 20 miles south of Buffalo, bordered by Lake Erie to the west, Chautauqua County to the south and the New York State Thruway to the east, sits the Southtowns area of Erie County, a largely rural region with rich local heritage, agrarian charm, historic village centers – and a tourism potential yet to be tapped. The area hosts scores of thousands of local and out-of-area visitors every year. However, with few of these visitors staying overnight to dine, visit shops or explore nearby attractions, the area has been unable to profit from the economic potential of their collective tourism base. The area's tourism potential is even greater considering the broader Buffalo Niagara region's cultural and heritage tourism appeal, defined by world-class architecture and other cultural attractions, wine trails, ski country, a diverse ethnic heritage and Niagara Falls. Meanwhile, each municipality continues to confront economic and quality-of-life challenges including a threatened agrarian economy, population loss and depressed town and village centers.

To determine how to effectively leverage the region's tourism appeal, a consortium of municipalities – the Southtowns Community Enhancement Coalition – commissioned the Institute for Local Governance and Regional Growth, a research and public service unit of the University at Buffalo, to 1) conduct a detailed inventory of the area's tourism assets and 2) develop in partnership with the community a blueprint for strategic growth in this industry. The initiative, *Partnering for*



The Southtowns area includes the Towns of Evans, Eden, Brant and North Collins and the Villages of Angola, Farnham and North Collins.

Tourism Development in the Southtowns of Erie County, ultimately will build upon the area's wide ranging and distinctive assets to promote tourism development, spur related economic development, and contribute to cultural, agricultural and environmental preservation.

The asset inventory, completed in fall 2005, identified nearly 500 tourism assets in the seven Southtowns municipalities

– the Towns of Evans, Brant, North Collins and Eden, and their respective Villages of Angola, Farnham and North Collins. Included in the inventory are the area's historic sites, heritage resources, arts and cultural venues, recreational assets, natural resources, entertainment venues and hospitality services such as shopping, dining and lodging.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



As context for the strategic planning initiative, the Institute has assessed the inventory findings and other tourism characteristics in the area to gauge the Southtowns' tourism **Strengths** and **Weaknesses**. Research of tourism best practices and trends, including a closer look at niche industries such as agritourism, heritage tourism and ecotourism, and analysis of the region's economic profile, formed the basis of the Institute's assessment of **Opportunities** for, and **Threats** to, tourism development in the Southtowns.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



III. The Big Picture

Tourism leverages many benefits, economic and otherwise. In addition to the immediate pay-off – tourists bring new money into the local economy – the industry: creates job growth and improves the ability of the area to attract skilled workers; promotes tourism and spin-off business development; and strengthens and distinguishes the community's image. Tourism growth also results in quality-of-life benefits, including the celebration of diversity, the support of lifelong education and healthy lifestyles, and fulfilling engagement of the area's youth.¹

In many respects, the Southtowns area is well positioned to realize these benefits by taking advantage of current trends in the tourism industry. Agricultural, heritage, cultural and recreational tourism are among the fastest growing of the niche markets.² The Travel Industry Association of America reports that 81 percent of U.S. travelers in 2002 were considered cultural heritage travelers. Moreover, thirty percent of U.S. adults say that a specific arts, cultural or heritage event influenced their choice of destination.³

¹ Creative City Network of Canada. "Making the Case for Culture." Retrieved May 15, 2006, from <http://www.creativecity.ca/resources/making-the-case/index.html>

² Cabrini, L. (2002, Sept). "Cultural Heritage and Tourism Development." Presentation for the International Conference on Heritage, New Technologies and Local Development. Retrieved April 6, 2006, from http://www.world-tourism.org/regional/europe/PDF/SPEECHES/2002/Ghent%20Belgium_.pdf

³ Travel Industry Association of America. (2003). "Travelers' Desire to Experience History and Culture Stronger than Ever."

Tourists are increasingly seeking unique and authentic travel experiences. Exemplary of this trend is that visitation to churches, cathedrals, mosques and temples has become an integral component of the tourism product.⁴ Also, the sprawling urban landscape of America enhances the value of rural areas' open space, natural amenities and "small town" feel.⁵

Even the growing popularity of the automobile as the mode of travel, and travelers' tendency to take more frequent but shorter trips⁶ favors destinations like the Buffalo Niagara region, the 500-mile radius of which encircles 41 percent of the U.S. population and 62 percent of the Canadian population.⁷

Cultural and related tourism markets are lucrative not only due to their rapid growth, but also because they attract a desirable type of traveler. According to the Travel Industry Association of America, compared to the typical U.S. tourist, cultural heritage travelers spend more (\$623 compared to \$457), travel longer (5.2 nights vs. 3.4 nights), and are somewhat older and more likely to have a graduate degree.

The area's focus on tourism development is also timely given the growing prominence of cultural

⁴ Woodward, S.C. (2004, Aug.). "Faith and Tourism: Planning Tourism in Relation to Places of Worship." *Tourism and Hospitality Planning & Development*, 1 (2), 173-186.

⁵ Deller, S.C., et al. (2001, May). "The Role of Amenities and Quality of Life in Rural Economic Growth." *American Journal of Agricultural Economics*. 83 (2), 352-365.

⁶ Cabrini, L.

⁷ Buffalo Niagara Enterprise. "Regional Demographics." Retrieved May 5, 2006, from http://www.buffaloniagara.org/Home/Data_Center/Demographics

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



and heritage tourism in the broader Buffalo Niagara region. Particularly noteworthy is

More broadly speaking, New York State is one of the nation's most popular tourism destinations – it

	Spending	Length of Trip	Age	Grad Degree
Cultural Traveler	\$623	5.2 nights	49	21 percent
Typical U.S. Traveler	\$457	3.4 nights	47	19 percent

Source: Travel Industry Association of America. "Travelers' Desire to Experience History and Culture Stronger than Ever."

was the third most visited state for cultural/historic travelers in 2002 and the fourth most visited overall in 2004, according to the Travel Industry Association of America.

increased redevelopment activity on the Buffalo harbor front, the near completion of Frank Lloyd Wright's Darwin D. Martin House complex, and progress in creating a lake-to-lake greenway of interconnected parks, river access points and waterfront trails along the Niagara River. South of the area's border, in Chautauqua County, tourism continues to build around the ski industry, related resorts and amenities, the Chautauqua/Lake Erie Wine Trail and Amish heritage, all of which offer linkages to the Southtowns.

Yet many factors threaten to impede the healthy growth of tourism in the Southtowns. For instance, though New York State is a top-visited state, it is also one of the least

Major region-wide planning and promotion efforts are under way to increase infrastructure support and build the industry's profile, including Advancing Arts and Culture Buffalo Niagara, the implementation phase of a two-year strategic planning effort in Erie and Niagara Counties. Part of this effort includes outreach to arts, culture and tourism organizations across the region to foster collaborative approaches to marketing, asset development and infrastructure support. The Buffalo Niagara Convention & Visitors Bureau is investing in cultural tourism marketing and has collaborated with organizations to develop packages of cultural attractions.

Top Ten States Visited by Cultural/Historic Travelers, 2002

1. California
2. Texas
3. **New York**
4. Florida
5. Pennsylvania
6. Virginia
7. Illinois
8. Tennessee
9. North Carolina
10. Georgia

Source: Travel Industry Association of America. (2003). TravelScope survey, "The Historic/Cultural Traveler." TIA and *Smithsonian* magazine.

generous in terms of allocating funds for tourism promotion. New York State's "I Love New York" campaign received approximately \$20 million tourism investment in 2004, placing the state at the lower end of the top-10 spending U.S. states. Meanwhile, Ontario spends \$40 million a year to promote Niagara Falls and the Niagara Region.

Erie County's recent fiscal woes are also troublesome for the tourism industry. Revenues from the bed tax were allocated to the

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



2004-05 State Tourism Office Budget Projections

1. Hawaii	\$69 million
2. Illinois	\$48 million
3. Pennsylvania	\$33 million
4. Texas	\$31 million
5. Florida	\$29 million
6. West Virginia	\$23 million
7. New York	\$20 million
8. Louisiana	\$18 million
9. Missouri	\$18 million
10. South Carolina	\$16 million
11. Arizona	\$16 million

Sources:

Travel Industry Association of America, 2004-2005
Survey of U.S. State & Territory Tourism Office Budgets.

Business First of Buffalo. (2005, April 18). "Marketer Says
Tourism Remains Undervalued."

Buffalo Niagara Convention & Visitors Bureau for tourism marketing until the 2004-2005 county budget crisis, when those funds were redirected to cover other county debt.

Also, having the assets is only one piece – albeit the foundational piece – of the puzzle for developing a sustainable tourism industry. Equally essential is that:

...Asset Development is Addressed

Venues and events are not only appealing to appropriate audiences but are visitor-ready – that is, suitable and capable of accommodating visitors and providing an enjoyable, quality experience;

...Information is Managed

Visitor information is clearly organized, communicated and marketed, as well as easily

accessible to travelers and residents alike; visitor information and related research is part of a comprehensive information management system that monitors economic trends, asset readiness and related performance factors;

...Complete Visitor Experience is Provided

Wayfinding and related infrastructure, including roadways, public transportation and signage, assist visitors in traveling among attractions; a diverse selection of visitor accommodations and support services, such as lodging and dining, are available and visitor-ready;

...Governance and Financial Support is in Place

Governance structures are able to effectively coordinate and monitor the tourism industry as well as connect to broader tourism opportunities; sustainable financial support is secured to ensure industry growth over the long-term.

The Southtowns area's respective strengths, weaknesses, opportunities and threats in these four core indicators of tourism success are discussed in the following analysis.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



IV. Asset Development

The Inventory: A Summary of Findings

The tourism asset inventory for the seven Southtowns municipalities, completed by the Institute in December 2005, provides an initial, objective assessment of the area's range of tourism offerings. Evaluating what there is to see and do in an area is the first and most important step in laying out a tourism strategy. Essentially, this is what the area has to "sell," which determines how the region should be marketed, how transportation should be developed, and how investment should be coordinated.⁸ As indicated by Partners in Tourism, a coalition of national associations and federal agencies building a common agenda for cultural tourism, too often a brochure or Web site is viewed as the first step when it should be the last. "Before getting to that final step, it is important to know what it is that you have – and what you want – to share with visitors."⁹

Through its research and field work, the Institute identified approximately 380 attractions and events that already qualify, or demonstrate potential to qualify, as tourism draws. The assets are categorized across 10 different tourism Themes:



Historic/Heritage



Agriculture

⁸ Crouch, G.I., and Brent Ritchie, J.R. (1999, March). "Tourism, Competitiveness, and Societal Prosperity." *Journal of Business Research*, 44 (3), 137-152.

⁹ Partners in Tourism. (2005). Cultural Heritage Tourism. "How Have These Principals Worked for Others?" Retrieved February 17, 2006 from <http://www.culturalheritagetourism.org/principles/worki ng.htm>



Recreation



Natural Assets



Cultural



Tourism Related



Dining



Shopping/Retail



Lodging



Conference/Meeting Facility

Assets were further catalogued according to a Type of event or venue within each theme, including historic sites, farms and farm stands, religious sites, cemeteries, community events, antique shops, equestrian resources, parks, art museums and sports facilities. The Institute attempted to collect the following data for each asset: contact information (e.g., address, phone number, Web site); descriptive information (e.g., narrative, year founded); operational information (e.g., event date, hours of operation, fees); performance data (e.g., annual attendance, number of paid staff); and digital information (photograph and Global Positioning System map coordinates).

The inventory reveals several general trends regarding the current picture of tourism in the Southtowns area. By far the dominating tourism theme in the area is **Historic/Heritage**, with 139 assets categorized as historic sites, churches, cemeteries or railroad points-of-interest.

Agricultural was similarly strong in terms of

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



representation in the inventory – more than 50 farms, farm retail stands, gardens, greenhouses and agricultural festivals were identified across the four towns and three villages. Given the area’s relatively small geographic scope, 39 **Natural Assets** – parks, beaches, trails and nature preserves – represent a significant tourism strength for the area. The areas of heritage, agricultural and ecotourism or recreational tourism clearly have potential for development as niche industries, and will be examined more closely later in this section of the report.

Of course, asset quantity tells only one part of the story with regard to a region’s tourism strengths.

For instance, it is not indicative of the quality of individual assets or their degree of visitor readiness. Within its current scope, the Southtowns tourism inventory does not contain the types of data needed to make such evaluations,¹⁰ though several general observations can be drawn based upon the data that are available.

¹⁰ Building on the asset inventory, it is recommended that the Southtowns conduct a more detailed assessment of individual assets to draw conclusions about visitor readiness and asset quality, a process which could include community evaluation.

A Closer Look

The following review explores in greater detail the respective strengths and weaknesses of the major tourism themes identified through the inventory. At the conclusion of this section, the overall opportunities and threats with respect to asset development in the Southtowns will be addressed.



Historic/Heritage

Strengths

The Southtowns’ collection of historic assets is diverse and distinctly authentic, and would certainly appeal to visitors both within and beyond the region.



Historic assets include the Huson Cemetery (Brant); Hicksite Quaker Meeting House (North Collins); Asa Warren House (Eden); and the First Church of Evans (Evans).

© Institute for Local Governance and Regional Growth

The area boasts some of the region’s oldest buildings, while many of its cemeteries date back to the Civil War and even the Revolutionary War. Its railroad points-of-interest include an original train depot from the 1880s (Nickel Plate Railroad Depot, Angola), the site of a horrific but famous train accident (1867 “Angola Horror”), and original cabooses (Brant and North Collins).

The Southtowns’ historic sites include the home of abolitionist Asa Warren (Eden), which is purported

to have been a station of the Underground Railroad for freed slaves. The Southtowns also features a diverse religious and ethnic heritage. North Collins’ Quaker settlers are represented by the Hicksite Quaker Meeting House (1851) and nearby Quaker cemeteries. Historic church

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



buildings are present in all seven municipalities and include St. Mary's Roman Catholic Church in Eden (the oldest parish in Western New York outside Buffalo) and the historic First Church of Evans, built in 1915 on the site of the first organized house of worship in the town (1818). All four towns have preserved original one- and two-room schoolhouses from the 1800s.

The area's distinctive architecture is represented by such structures as the "round barn," or the Gamel Hexadecagon Barn, in North Collins, which is listed on the National Register of Historic Places, and an outdoor baker's oven, the last of its kind in the community (Brant).

The area's inventive past is also a potential tourism asset – Angola is the birthplace of air conditioner inventor Willis Carrier, while Eden hosted Spencer Kellogg's Aries Press.

Weaknesses

Perhaps the most daunting challenge facing the Southtowns' historic and heritage tourism industry is visitor readiness. Much of the area's fascinating history is available only via town or village historians or through dispersed records and archives. Though there are some historic plaques, many historic structures would go unnoticed due to the absence of any onsite signage or postings. Other significant historic assets are in physical disrepair and in need of significant capital improvements. Many do not maintain regular hours and are not overseen by regular staff. The dispersal of the historic structures throughout the towns and villages is also an impediment to visitor accessibility, though this can be addressed through infrastructure improvements and transportation.



Agricultural

Strengths

Although the agrarian economy is stronger in some Southtowns municipalities than in others, all four towns have something to contribute to the development of an agritourism industry. Ranging from vegetables to dairy, to greenhouses to alpacas, to horses to buffaloes, the Southtowns' 52 agricultural assets undoubtedly offer a wide range of things to see and do. In Eden, vegetable farming is predominant, and many farms are third-generation enterprises. The Eden Corn Festival draws over 100,000 people in August for a four-day event that includes the sale of 65,000 ears of corn, parades, rides, entertainment, and a beauty pageant. Eden is also home to Eden Valley Alpacas, where visitors can arrange tours or visit



Selling fall flowers at Our Family's Harvest Market (Brant); llamas at Strawberry Hill Farm (Eden); giant pumpkins at Awald's (North Collins); corn eating contest Eden Corn Festival (Eden).

© Institute for Local Governance and Regional Growth
© Carl Modica, Eden Corn Festival photograph

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



the alpaca yarn shop. In Evans visitors will find the A&S Buffalo Ranch, which raises 42 buffaloes for wholesale meat production; informal tours can be arranged here as well. North Collins' Awald Farms is known for its giant pumpkins in the fall and its fresh berries in the summer. Greenhouses throughout the four-town area sell colorful annuals and perennials throughout the spring, summer and fall. Brant is well regarded for its berry farms and the annual Tomato Fest at Evangola State Park. Its Pine Tree Riding Stables feature horseback riding and Texas Longhorns. Most of the area's agricultural businesses offer u-pick services and roadside retail stands.

Weaknesses

One of the more popular agritourism activities is the farm tour, where visitors can undertake a tangible experience – for instance, watching cows being milked, riding horses, petting an alpaca or touring a farm on a tractor. Some of these types of activities are available, though most are not publicized and are done ad hoc, based on a visitor's advanced request. Publicizing these assets is another challenge facing agritourism development in the Southtowns. Many farms are not identified by signage. Moreover, many farms are not aware of or, by their own admission, not interested in the tourism aspect of their business.

For instance, some farm owners operate on a part-time basis, and cannot devote the time or resources to developing alternate agricultural enterprises.

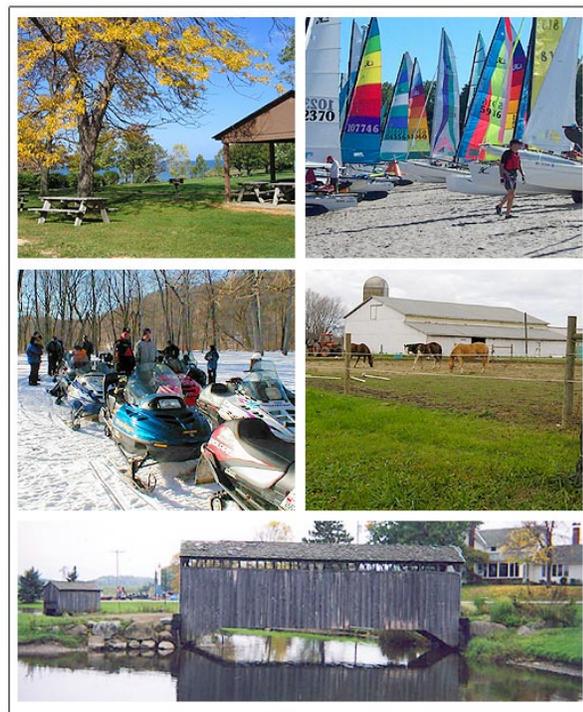


Natural Assets and Recreation

Strengths

Natural assets and recreation are important complements for developing a strong ecotourism or recreational tourism industry, and thus are examined together in this section.

With Lake Erie as the western border, hundreds of acres of forest, the fossil-rich and fish-stocked Eighteen Mile Creek, and multiple nature preserves, the Southtowns area is well endowed with natural assets. Indeed, although only 20 miles south of Buffalo, visitors can feel a world away when surrounded by the Southtowns' natural beauty and open space. One of the area's more



Evangola State Park (Brant); Hobie Kenobie Sailboat Regatta (Evans); Snowmobiling in Eden; Pine Tree Riding Stables (Brant); Edwin Winter's Outdoor Museum (North Collins).

© Institute for Local Governance and Regional Growth except snowmobiles (courtesy of Eden Trailblazers Snowmobile Club)

notable assets include Brant's Evangola State Park, a Lake Erie beachfront park and campground,

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



which attracts more than 90,000 visitors annually. Evans features four beachfront parks, one of which, Wendt Beach, features an historic mansion being considered for development as a bed and breakfast. In Eden, the Franklin Gulf county land bank contains more than 600 acres of forest land. On the grounds of the Winter families' Nature Preserve and Outdoor Museum in North Collins are ponds, a covered bridge and, for public viewing, a millwheel, public art, railroad caboose, steam engine, plows and tractors. The 20-acre Ayer-Stevenson Audubon Preserve in Evans is a popular site for bird and wildlife watching and offers guided tours.

Building off the area's natural assets is a host of recreational resources and activities. The Buffalo Niagara region, especially the Southtowns area, offers premium freshwater fishing, an asset that attracts visitors from far and wide. The Town of Evans' Sturgeon Point Marina, Point Breeze RV Resort and Fox Point attract thousands of fishermen a year – especially for the annual Battle of the Points Fishing Tournament. Eighteen Mile Creek also offers premium fishing, with two public access points with trails and parking provided by the Town of Evans. Evangola State Park in Brant is frequented by fishermen. Water recreation is also a popular activity in the area. The Lake Erie Diving Center in Angola offers SCUBA equipment, training and charter services, while the annual Hobie Kenobie Sailboat Regatta held in July includes a race, camping and other festivities.

Town and village parks offer an assortment of activities, including sports fields, swimming, skateboarding and even arts, cultural and musical events. There are three public golf courses, two in Eden and one in Evans.

Winter activities abound in the Southtowns. In Eden, snowmobile riders will find 40 miles of trail winding through wooded areas from Evangola State Park, to Angola, to North Evans, to Hamburg, to Eden and to North Collins. Food and fuel are available at stops along the trail. Eden's Winter Fest includes activities such as ice skating and sledding, hayrides, bonfires and contests. Ice fishing is a popular seasonal sport throughout the Southtowns.

Weaknesses

Challenging the development of ecotourism and recreational tourism industries in the Southtowns is public access. Though most town- and village-owned facilities are accessible (typically open dawn to dusk in season, with parking), other major assets are not. The most prominent but inaccessible of these assets are two beachfront parks in Evans. Due to the Erie County fiscal crisis and its inability to fund lifeguards, the town's two county-owned beaches (Bennett and Wendt Beaches) are not open to the public for swimming. Also, Eden's Franklin Gulf, a county-owned land bank, is not open to the public, though the area is used unofficially for hiking and hunting. Finally, Eighteen Mile Creek, one of Western New York's best known fossil and geologic exposures, is difficult to explore – much of the land is privately owned and posted, while roadside parking is limited or prohibited. With public access to such valuable natural assets either not permitted or inconvenient, the area cannot provide the recreational activities that might serve as premier draws to the area – guided hikes through Franklin Gulf, additional water and beach activities at Wendt or Bennett Beach, or even educational tours and fossil hunts along Eighteen Mile Creek.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



Cultural

Strengths

The tourism inventory identified approximately 60 cultural assets across the four towns, a modest figure¹¹ that masks the significance of the area's cultural draw. Frank Lloyd Wright's Graycliff Estate is in the Town of Evans, and attracts nearly 8,000 visitors annually. This will be an especially important asset as the broader region begins to promote its impressive collection of Frank Lloyd Wright and other architectural gems. The estate's appeal extends beyond the region, and its synergy with the area's extensive historic, architectural and natural assets is indicative of the area's overall potential. Graycliff could serve as the "hook" that lures visitors to the area and then sends them along to the region's many other attractions for a fuller tourism experience.

Other noteworthy cultural assets include the outdoor museums operated by the Winter families in North Collins, and the public art of the Schwartz Building/Lorocco Residence in Brant. There are several performing arts resources in the area. In Evans, the Lake Shore Community Players organizes three productions a year, including a summer event and a holiday play. A majority of the Southtowns municipalities host summer concert

series in their town and village centers, while North Collins is the site of the annual Langford Jamboree and Tractor pull, an event which attracts visitors from outside the area. Arts and crafts events are held in Evans, Angola and Brant, while individual artisans are present across the area.

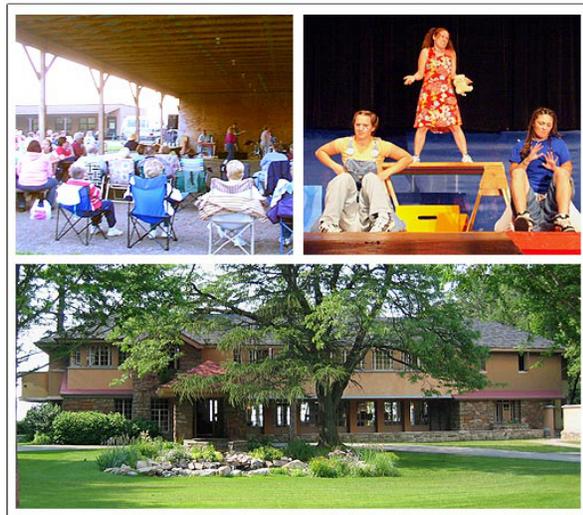
Weaknesses

A weak point of the Southtowns' cultural base is the lack of a critical mass. For instance, the concert

series are spread out across the seven municipalities and are not likely to be as attractive, for instance, as one high-profile concert series for the entire area. The Southtowns cultural assets face challenges similar to those of the area's historic assets – a lack of visitor readiness and inadequate resources for maintaining

regular hours or developing tourism-appropriate programming and services.

Another challenge particular to the cultural industry is the question of whether the full extent of the Southtowns' cultural resources has been captured in the inventory. For instance, only a few artisans are catalogued in the inventory, though there are likely many others. Many artists and craftspeople do business by word of mouth and out of their private residence, which may explain why there is a general lack of awareness of these assets.



Brant Concert in the Park Series (photo courtesy of Town of Brant); Lake Shore Community Players production in Evans (photo courtesy of LSCP); Graycliff in Evans (© Clifford Whitman, courtesy of Graycliff Conservancy)

¹¹ This is especially so in that many assets categorized as "cultural" in the inventory were also categorized as "historic/heritage."

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



Shopping and Retail

Strengths

Although shopping is typically categorized as an ancillary service that complements the tourism experience rather than serving as the primary draw, this is not the case for the Southtowns area. Visitors will not find a shopping mall or a critical mass of chain or big box stores (indeed, a total of 20 venues are spread across the four

towns and three villages). But what they will find is a distinctive, authentic and wholly

unique shopping experience. For instance, the area features several antique shops, a loom woven rug shop, a gift shop for America's last manufacturer of metal kazoos, a Native American art and gift store, and an Alpaca yarn and clothing store. These venues and activities would appeal to the typical cultural or heritage traveler. According to Partners in Tourism, today's travelers are well educated and well traveled and "...expect more from their travel experiences – making quality and authenticity more important than ever before."¹²



Kazoo Boutique (Eden); Fintak Loom Woven Rugs (North Collins); Ravensong (North Collins)

© Institute for Local Governance and Regional Growth

Weaknesses

That many of these unique shopping venues do not maintain regular hours is perhaps the most significant weakness for touting the tourism aspect of the area's retail industry. Many antique shops

maintain short store hours with most visitation made by appointment. Signage is often poor and in some cases access is inconvenient.

Asset Development: Opportunities, Threats

There are many prospects for strategic asset development in the Southtowns based on its

strong collection of venues and events. The following is an overview of several opportunities for advancing

the tourism industry around these assets. Also reviewed are factors that could threaten the progress of the industry. These opportunities and threats are based on an analysis of the asset inventory, additional research, and public comments received at two community forums held in February 2006 to review inventory findings.

Opportunities

- The lack of visitor readiness on the part of many venues is an immediate challenge facing the tourism industry in the Southtowns. However, it is also an opportunity to focus packaging and

¹² Partners in Tourism. "Five Principals for Successful and Sustainable Cultural Heritage Tourism." Retrieved May 8, 2006, from

<http://www.culturalheritagetourism.org/principles/comeAlive.htm>

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



promotion efforts, as clusters of assets can be assembled around those assets that are visitor ready; capital and related improvements can be prioritized around those assets most in need of, and most appropriate for, investment.

- Link with related asset development efforts in the broader Buffalo Niagara region (e.g., Advancing Arts and Culture Buffalo Niagara) to determine if partnering opportunities exist.
- Develop historic driving tours by linking sites through plaques with audio or brochures providing more detailed information and stories;
- Develop small-group guided tours of select historic sites;
- Arrange specific heritage tours for railroad history, Underground Railroad sites and churches or religious sites;
- Connect with broader regional tourism assets and promotion efforts, especially those which focus on: architecture, historic tourism and preservation, heritage tourism (e.g., African American, Native American and religious heritage), and natural and recreational assets (Buffalo harbor front, lake-to-lake greenway, sport fishing promotion).
- According to Partners in Tourism, visitors remember 10 percent of what they hear, 30 percent of what they read, 50 percent of what they see, and 90 percent of what they do.¹³ Heed this statistic and strive to develop more activities around the four-town area's assets,

such as farm tours, recreational excursions, historic- and heritage-related events and activities, and festivals celebrating the area's ethnic roots, artists or agrarian economy.

- Forge collaborations among venues and events across the four-town area to pool resources and develop fewer but more impressive tourism venues and events, which will draw a more concentrated audience (for instance, farm retail stands are popular, but a larger farmers market would increase the variety of produce sold and leverage related events and festivals.¹⁴
- Link area farms for multi-site farm tours (Niagara County has had success with its apple farms).
- Additional agritourism opportunities: educational tours, processing demonstrations, historical re-creations (old farm machinery), rural theme park, farm museum, crop art, festivals, petting zoos, accommodations or bed and breakfasts, a farm store (gifts, farm goods), and nature-based tourism.¹⁵
- Build off niche retail assets and historic buildings to revitalize village and town centers and leverage new development (restaurants, additional shops, lodging, related businesses).

¹³ Ibid.

¹⁴ Kuehn, D., et al. (1998, Feb.). "Considerations for Agritourism Development." New York Sea Grant. Retrieved May 28, 2006, from <http://www.seagrantsunysb.edu/Pages/FactSheets-PDF/Tourism/Agritourism98.pdf>

¹⁵ Adam, K.L. (2005, Sept.). "Entertainment Farming and Agri-Tourism." National Sustainable Agricultural Information Service. Retrieved May 10, from <http://attra.ncat.org/attra-pub/entertainment.html>

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



- Develop diverse, multi-themed packages to accommodate different audiences, including families, couples and retirees (e.g., weekend package could include cultural, historic, recreational venues, with a train tour, movie theater and fine dining).
 - Build on the popularity of the area's summertime automobile shows.
 - Leverage momentum of recent and planned developments in the four-town area (Town of Evans bike path project, potential for redevelopment Wendt Beach and Wendt Mansion, Angola's Nickel Plate Railroad Depot renovation, Angola Historic Homeowners Association and related activities).
- Threats**
- Spreading limited resources too thin in the Southtowns' approach to asset development and venue improvement
 - Lack of a strategic tourism planning process that engages the community, establishes buy-in and identifies goals, objectives and a workplan for asset development, infrastructure support, marketing and financial sustainability.
 - Jumping ahead to major marketing efforts before key assets are visitor ready – bringing tourists to the doors of assets that cannot serve them or offer a quality experience.
 - That many businesses owners, by their own admission, are not in tourism mindset and do not have the time or financial resources to enhance visitor readiness or develop services, products and programs for visitors.
- Costs of development at the individual business scale limiting the practicality of broader efforts;¹⁶ not emphasizing the importance of individual business plans as part of the tourism development process.
 - General lack of awareness of the area's tourism potential and appeal (this is true regionally as well); not communicating with stakeholders to build interest in, and commitment to, tourism.
 - Failure to address dispersal of assets across the four-town area (geographic scale of region increases importance of visitor information, transportation and visitor accessibility).
 - Developing tourism at the expense of individual organizational/business missions; not focusing on strengthening the assets into sustainable enterprises that can diversify and complement the regions offerings.
 - Not considering broader economic trends, including the increasingly global economic environment and its effect on the local agricultural economy¹⁷ (this is also an argument for agritourism opportunities); failure to address related demographic trends (population is declining in Erie County, although at a somewhat slower pace in the Southtowns).¹⁸

¹⁶ Kuehn, D. & Hilchey, D. "Agritourism in New York: Management and Operations." New York Sea Grant. Retrieved April 7, 2006, from <http://www.cfap.org/fap/agtourmgt.pdf>

¹⁷ Deitz, R. & Cowell, M. (2005, Spring). "The Regional Economy of Upstate New York. How New York State's Agriculture Industry Is Staying Competitive." Buffalo Branch, Federal Reserve Bank of New York.

¹⁸ Regional Knowledge Network, Institute for Local Governance and Regional Growth, University at Buffalo. <http://rkn.buffalo.edu>.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



V. Information Management

Understanding the Visitor Market

At this point, only general assumptions can be made about the potential visitor base for the Southtowns area. In the immediate area, the area's major attractions draw thousands of visitors annually – 8,000 tour the Graycliff Estate; 90,000 visit Evangola State Park; and more than 100,000 attend the four-day Eden Corn Festival. Extending the radius to the entire Buffalo Niagara region, the potential market enters the millions – approximately 16 million people visit the binational Niagara region in a year. A recent survey of 17 Erie and Niagara County cultural organizations counted more than 700,000 visitors just during summer 2003.¹⁹ The potential market continues south, where major audiences are drawn every year to Chautauqua County's diverse tourism assets, which include the famous Chautauqua Institution.

It is not enough, however, to know the potential market is large – understanding the current visitor base is the critical first step. Currently, the Southtowns area lacks such information. Indeed, regular market assessments are costly and difficult to implement. The Buffalo Niagara Convention & Visitors Bureau conducts regular visitor questionnaires to those stopping at its Visitor Centers, but broader survey efforts have been more intermittent. In summer 2006, the Visitors Bureau will survey visitors to four architectural and related attractions: Graycliff Estate, Darwin D. Martin House, Roycroft and the Albright-Knox Art

¹⁹ Institute for Local Governance and Regional Growth, University at Buffalo. (2004, Feb.). "One Summerlong Sensation Economic Impact Assessment."

Gallery. These data will advance the Southtowns understanding of a major component of its visitor base.

Of course, a more comprehensive analysis is needed. Quantitative market assessments can help the area establish priorities and set realistic expectations of visitation levels, as well as better gauge the scope of visitor services and attractions needed. Important types of information to collect include the visitor's geographic origin, socio-economic characteristics (age, family composition, occupation, income); purpose of trip/mode of transportation; and motives and benefits (underlying reasons for visiting the area).²⁰

Reaching Out to the Visitor Market

Once the Southtowns area has a stronger sense of its visitor base, it can begin to tailor its offerings and services to attract broader markets. In terms of current marketing efforts, the seven Southtowns municipalities have begun to pool resources to collectively advertise events in community newspapers and other local media. Branding efforts and broader marketing of the area has not taken place, although individual organizations' marketing efforts were not evaluated as part of this study, and may reach out to broader audiences.

With respect to the area's potential market, Southtowns community members identified several niche markets to target, including bird watchers, hikers, cyclists, outdoor enthusiasts, boaters, school

²⁰ Belland, G. & Boss, E. "Cultural and Historical Sites: Assessing the Tourism Potential." Retrieved May 10, 2006, from http://www.icomos.org/icomosca/bulletin/vol3_no3_belland_e.html

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



groups, bus tours, day-trippers from the Southern Tier, Niagara Falls, Buffalo, Pennsylvania and Ohio, senior citizens, the recreational vehicle market, Civil War enthusiasts, and friends and family visiting community residents.

The Southtowns area clearly has much to offer across diverse tourism interests – agriculture, recreation, nature, culture and history. This foundation for tourism must be translated into a saleable brand and a concrete identity. What distinguishes the Southtowns from other visitor destinations? Identifying and then building this brand takes time and resources and the input of the entire community – it must be an integral component of the strategic planning process. Moreover, the brand should be integrated into the broader Buffalo Niagara region's tourism brand. Marketing the brand and the Southtowns' tourism offerings must also consider the diversity of audiences. A variety of media should be utilized, including radio, television, the Internet, regional newspapers and niche magazines and publications.

Communicating with visitors does not stop once the traveler decides to visit the area. Providing centralized, convenient access to information about the area's attractions is similarly important. Currently the Southtowns area provides largely general information about its venues and events across several municipal Web sites, Chambers of Commerce or other community brochures, and individual asset publications. An opportunity for improving the area's provision of visitor information exists with the recently completed asset inventory. As a database, the inventory, once honed and modified for purposes of a public audience, can serve as the backend of a centralized tourism Web site. Such a Web site could serve as a portal for

visitor access to information about individual assets as well as pre-arranged, themed packages of venues and events that cut across the four-town area. The Southtowns should consider linking to related tourism Web sites, including that of the Buffalo Niagara Convention & Visitors Bureau, the Chautauqua County Visitors Bureau, and the Niagara Tourism & Convention Corp.

The opportunity to physically greet visitors is also useful. Such an opportunity exists off the New York State Thruway Exit 57A, which is a conduit to the four-town area. A visitors' center at this exit would serve to provide a friendly introduction to visitors, an opportunity to capture additional audiences, and a central location to provide visitor information. Front-line hospitality staff (hotel and restaurant staff, public transportation drivers) is also a critical conduit of visitor information. Ensuring this visitor interface is properly informed and trained is complicated, however, by the high rate of turnover in the hospitality industry.²¹

Research Support

As the Southtowns' tourism industry evolves, research support will be essential to informing trends, new developments and necessary adjustments. Part of this system is regular evaluations of the visitor base, but additional components include assessment of the area's venues and events with respect to visitor readiness (e.g., availability of visitor programming and services, parking, access for people with disabilities, restrooms); monitoring of demographic trends in the region; and measurement of the economic impact of the area's tourism industry and other

²¹ World Travel & Tourism Council, Human Resource Task Force. (2002). "Human Resources Opportunities and Challenges," 41.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



performance indicators (attendance, job growth). Much of this research can be accomplished by Southtowns area representatives; however, partnerships with broader regional efforts should be explored for maximum efficiency of resource use.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



VI. Complete Visitor Experience

The total quality of the visitor experience is becoming more important to tourists and the development of a destination. In other words, activities such as purchasing tickets, and locating and traveling to the various tourism businesses need to be as hassle-free as possible.²² The Southtowns area has many existing strengths in this area. Its town and village centers are pedestrian friendly (with recent investments made in aesthetically improving streetscapes). The Southtowns is also strategically located off the New York State Thruway and is accessible via major highways including Routes 5, 20, 62 and 75, which crisscross the broader region and connect with other major routes outside the area. Although public transportation in the area is weak, the Niagara Frontier Transportation Authority has announced plans to begin bus service along Route 62 to link Niagara and northern Erie Counties with Eden, North Collins and Gowanda to the south starting in September 2006.



A complete visitor experience might include entertainment (New Angola Theatre/Angola), dining choices (Tubby's Take-out, near Lake Erie/Evans or North Collins Hotel/North Collins Village); and lodging (Angola Motel/Angola)

© Institute for Local Governance and Regional Growth

Nonetheless, the area's infrastructure challenges are not insignificant. Signage is generally poor not only at the individual asset level, but also for the entire system. For instance, the region lacks an

attractive gateway, which would be helpful in alerting passersby, as well as visitors, that they are entering the area. It would introduce a visual theme that could be carried throughout the area on other signs. Also, it would provide a stopping point for further visitor information.

Public transportation must be expanded beyond the new bus route to include stronger inter-municipal connections within the Southtowns, especially given the geographic reach

of the area. Such infrastructure needs can be integrated with the area's tourism strengths, perhaps through an historic trolley or rail tour across the four towns and three villages. Assets' lack of parking and access for people with disabilities is another infrastructure challenge facing the area.

Visitor support services, including dining establishments, lodging and related entertainment are also critical to providing a complete visitor experience.

The Southtowns area has a diverse selection of eateries (78 across the four towns), ranging from

²² Crouch, G.I. & Brent Ritchi, J.R. (1999, Mar.). "Tourism, Competitiveness and Societal Prosperity." *Journal of Business Research*, 44 (3), 137-52.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



summer food stands and ice cream parlors near the Lake Erie beaches, cafes and pubs in the village and town centers, and many fast food eateries along the busier routes. Although there are a few fine dining establishments in the Southtowns, several others have closed due to inadequate business. As the tourism industry expands, it may become more critical to provide visitors with a greater diversity of dining selections.

Lodging is scarce in the Southtowns area. As a result, the inventorying effort looked to the immediately surrounding towns to assess such amenities. In the four-town area there is only one motel – the Angola Motel, which provides 18 rooms. Spots along Lake Erie provide recreational vehicle access and campgrounds (Evangola State Park). Greater selection of lodging is available in the towns of Hamburg, Orchard Park and East Aurora. Given this shortage of lodging in the immediate vicinity, it is likely that the Southtowns is missing out on important economic returns from overnight visitation. Indeed, community leaders have heard direct complaints from out-of-area visitors to marinas and other attractions regarding the lack of lodging amenities. The Southtowns should target niche audiences in its provision of lodging by developing bed and breakfasts or renovating historic buildings into quaint hotels. Another opportunity for capturing overnight visitors may exist in the RV market, which is likely to expand as the Baby Boomer generation enters retirement years.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



VII. Governance and Financial Support

That this effort was initiated by a consortium of government officials and community leaders from the seven Southtowns municipalities speaks directly to the area's strengths in tourism governance and support. The Southtowns Community Enhancement Coalition provides a forum and network for intermunicipal cooperation that will facilitate not only the growth of the tourism industry but also broader economic development in the four-town area. The Coalition, formed in 2004 based on the recognition that the municipalities share both challenges and goals, meets monthly to discuss issues and collaborative opportunities. It is also built upon a foundation of collaboration in the area through shared services agreements and farm preservation and other planning initiatives.

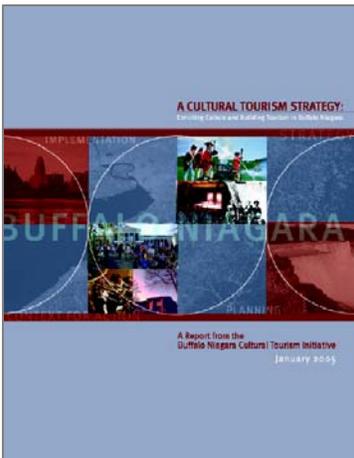
Joint advertising, regular guest speakers and collaborative advocacy efforts are just a few of Coalition's recent accomplishments. Its potential is even greater when considering the possibility of cross-sector partnerships with businesses, non-profits and community groups in both the Southtowns area and across the Buffalo Niagara region. The group may also gain greater leverage as this initiative progresses by forming sub committees to deal

with specific tourism issues. It is critical that cross-sector support be secured to sustain the efforts of the volunteer-based Coalition.

This effort also builds on the community's momentum and enthusiasm. Citizens, community leaders and government officials in the various municipalities have already moved forward on, or already completed, important tourism-related initiatives, including: preservation of the New Angola Theatre and Nickel Plate Railroad Depot in Angola, agritourism planning initiatives in the Town of Brant, a feasibility study of a Farm Museum in Eden, and the renovation of Schoolhouse #8 in North Collins.

A group of historic homeowners in Angola (Angola Historic Homeowners Association) has been meeting over the past year to learn about the village's and their homes' history, and to discuss implementing historic home tours and related activities. There is also tremendous community pride in the Southtowns, much of which was evident at the two well-attended public forums held in February 2006 to present inventory findings.

Beyond the Southtowns, many efforts are under way to advance the Buffalo Niagara region's tourism and cultural and historic tourism industries. In Erie and Niagara Counties, Advancing Arts and Culture Buffalo Niagara is partnering with arts and cultural organizations to address asset capacity issues (e.g., strategic planning and fiscal sustainability), as well as



The effort Advancing Arts and Culture Buffalo Niagara builds on a comprehensive tourism planning document developed by community stakeholders between 2003 and 2005.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



shared challenges such as signage, transportation and marketing. Chautauqua County is also



advanced in its tourism promotion efforts and offers visitors diverse packages that include its agricultural, wine,

arts and culture and historic activities. It will be essential for Southtowns representatives to forge connections with these broader efforts. Moreover, the Southtowns governance boundaries must be fluid enough to allow diverse partnerships (e.g., partnering with surrounding towns such as Hamburg, Boston, the Cattaraugus Reservation, Orchard Park and Collins).

Fiscal support for advancing the tourism industry is certain to be a challenge for the Southtowns, especially given the budgetary issues facing New York State, Erie County (which has redirected the Erie County bed tax away from the Buffalo Niagara Convention & Visitors Bureau) and the region's local municipalities. Creative partnerships and private sector investment will need to supplement public sector and volunteer support.

PARTNERING FOR TOURISM DEVELOPMENT IN THE SOUTHTOWNS OF ERIE COUNTY



VIII. Conclusion

As the Southtowns community moves forward on its efforts to plan for tourism development, it must keep in mind that this is a long-term project. Throughout the process, leadership, stewardship and commitment will be the critical ingredients for building a healthy tourism industry. With the area's greatest strengths being its distinctive assets and community leaders, perhaps the biggest threat is not pursuing a collaborative planning initiative that engages the full spectrum of the community and addresses the entire scope of the tourism system.