



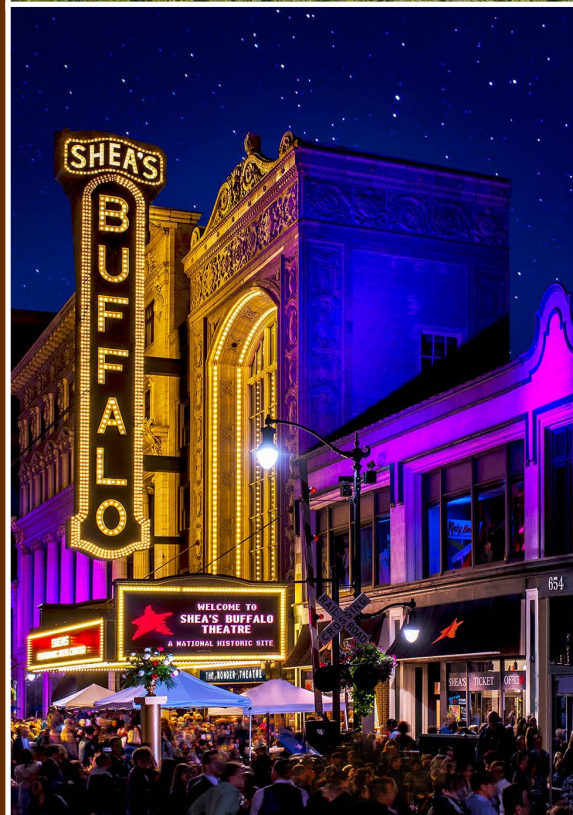
Western New York OUTDOOR RECREATION & CULTURAL TOURISM STUDY

FEBRUARY 2025

PREPARED FOR:



New York State
Parks, Recreation and
Historic Preservation



ACKNOWLEDGMENTS

PROJECT ADVISORY COMMITTEE



New York State
Parks, Recreation and
Historic Preservation



RALPH C. WILSON, JR.
FOUNDATION



Natural
Heritage Trust



Empire State
Development

STAKEHOLDERS

The project team acknowledges the many representatives from local governments, regional economic development organizations, non-profit groups, business owners, and other stakeholders for their significant contributions to this report.

CONSULTANT TEAM



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CHAUTAUQUA INSTITUTION

EXECUTIVE SUMMARY



A COMPELLING TOURISM LANDSCAPE

Western New York (WNY), defined in this study as the area covering the ten westernmost counties in New York State and three territories of the Seneca Nation, is a captivating tourism region. WNY encompasses **31 state parks**, two **Great Lakes shorelines**, **vibrant urban centers**, areas of **stunning geology**, and **authentic rural villages** and **agricultural landscapes**. Tourism in WNY generated \$6 billion in visitor sales in 2023, supported in part by 16.9 million visits to state parks.

Unsurprisingly, outdoor recreation and cultural destinations are two of the primary drivers of tourism to WNY, with a variety of public lands, non-profit organizations, and private businesses activating tourism experiences for visitors. The region is **well-positioned to benefit economically from tourism**, with a strong mix of hospitality services established throughout urban and rural communities.



EXPLORING A REGIONAL BRAND IDENTITY

While WNY does not have an established regional tourism brand, there are compelling brand identity factors and narratives that can support future branding and marketing efforts for the region as a whole. WNY is a **well-rounded** tourism region, with attractive destinations and experiences for a variety of potential visitors. The region's relationships to **waterways**, **U.S. History**, and **cultural heritage** can be the basis of powerful storytelling.



Accessible outdoor recreation in all seasons.



Rich in history that has shaped the region and country; stunning cultural vibrancy.



Welcoming and authentic small towns; vibrant cities.



Ever-changing beauty of landscape and place.



Images courtesy iLoveNY





POWER ASSETS FOR REGIONAL TOURISM



Drawing from WNY's tourism landscape and brand identity, it is clear that WNY is a well-rounded tourism region with multiple regional **"power assets"** - key areas of region-wide strength and momentum, rooted in communities and landscapes, with the ability to grow and sustain the scale and impact of tourism in WNY:

- **Trail-based Recreation:** adventures big and small for visitors of all ability levels to experience natural wonders, thrills, and peaceful landscapes.
- **Water-based Recreation:** famous fisheries, waterfront parks, historic waterways, and plentiful boating and paddle sports opportunities.
- **Cultural Tourism:** works of world-famous artists and architects, dynamic performing arts venues, culinary delights, authentic small towns, dozens of cultural itinerary trails, and major league sports.

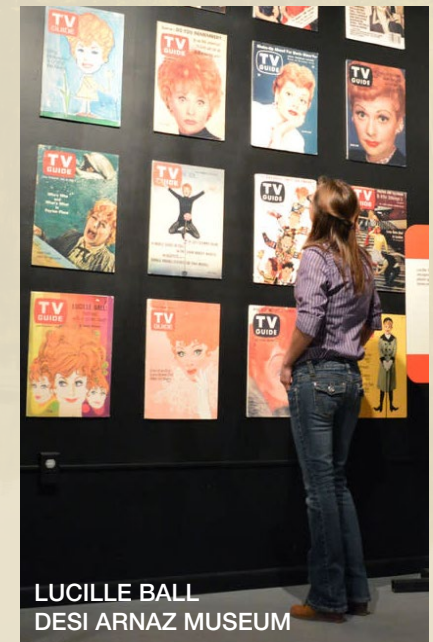
Tourism partners in WNY already recognize the immense value and potential of these power assets. There is ongoing work in the region to expand and connect regional trails, improve trail quality and accessibility, and leverage the economic potential of the region's trail-based experiences. Across the region's waterways, local and regional partners are establishing new "blueway" trails, improving water access points, and enhancing urban waterfront recreation opportunities. There has been significant recent investment in WNY's stadiums and performing arts venues as well.



ERIE CANALWAY
TRAIL



NIAGARA FALLS STATE PARK



LUCILLE BALL
DESI ARNEZ MUSEUM

Images courtesy ILoveNY



REGIONAL CONNECTIVITY & ACCESSIBILITY

Key to WNY's regional tourism potential is the degree to which regional power assets can intersect with each other and communities large and small to create well-rounded tourism experiences. Connectivity around WNY is critical to these intersections - the region is well-served by **highways** and most tourism destinations are within a two-hour drive of the region's major urban centers and international airports.

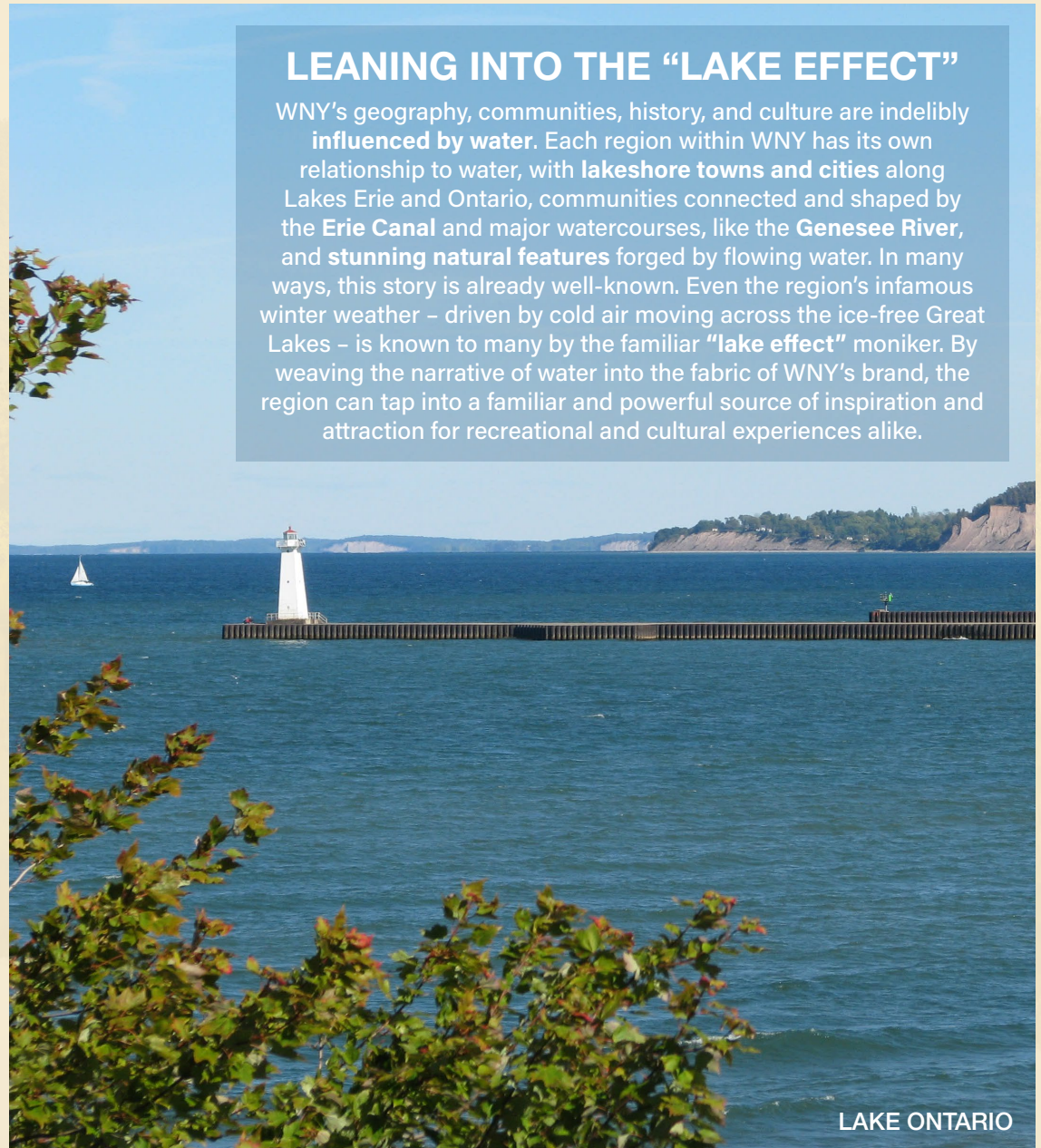
Improving **trail system connectivity** and **wayfinding**, expanding **universally-accessible** trail and water-access infrastructure, activating connections between **vibrant urban centers** and **authentic rural communities**, and **supporting entrepreneurship** are amongst opportunities to further enhance and connect tourism experiences in ways that benefit communities.

LEARNING FROM OTHER REGIONS

Around the U.S. **And** Canada, regions with similar assets and characteristics are finding success with regional tourism strategies. Places like the **Ozarks**, **Northwest Michigan**, the **Pennsylvania Wilds**, and **Asheville, NC** demonstrate the power of regional approaches that preserve local identity and authenticity, sustain regional collaboration, leverage trail and water assets and other unique attractions, and activate urban-rural connections for mutual tourism benefit.

LEANING INTO THE “LAKE EFFECT”

WNY's geography, communities, history, and culture are indelibly **influenced by water**. Each region within WNY has its own relationship to water, with **lakeshore towns and cities** along Lakes Erie and Ontario, communities connected and shaped by the **Erie Canal** and major watercourses, like the **Genesee River**, and **stunning natural features** forged by flowing water. In many ways, this story is already well-known. Even the region's infamous winter weather - driven by cold air moving across the ice-free Great Lakes - is known to many by the familiar “**lake effect**” moniker. By weaving the narrative of water into the fabric of WNY's brand, the region can tap into a familiar and powerful source of inspiration and attraction for recreational and cultural experiences alike.



LAKE ONTARIO



ABOUT THIS REPORT

This report explores the current landscape of outdoor recreation and cultural tourism in Western New York (WNY). WNY has long been home to notable tourism destinations, benefiting from proximity to major population centers. In recent years, there has been increased interest and investment in new and enhanced outdoor recreation and cultural tourism experiences, along with a growing recognition of the important economic role of tourism in communities across the region. However, there has not been a comprehensive examination of this region's tourism assets **to-date.**

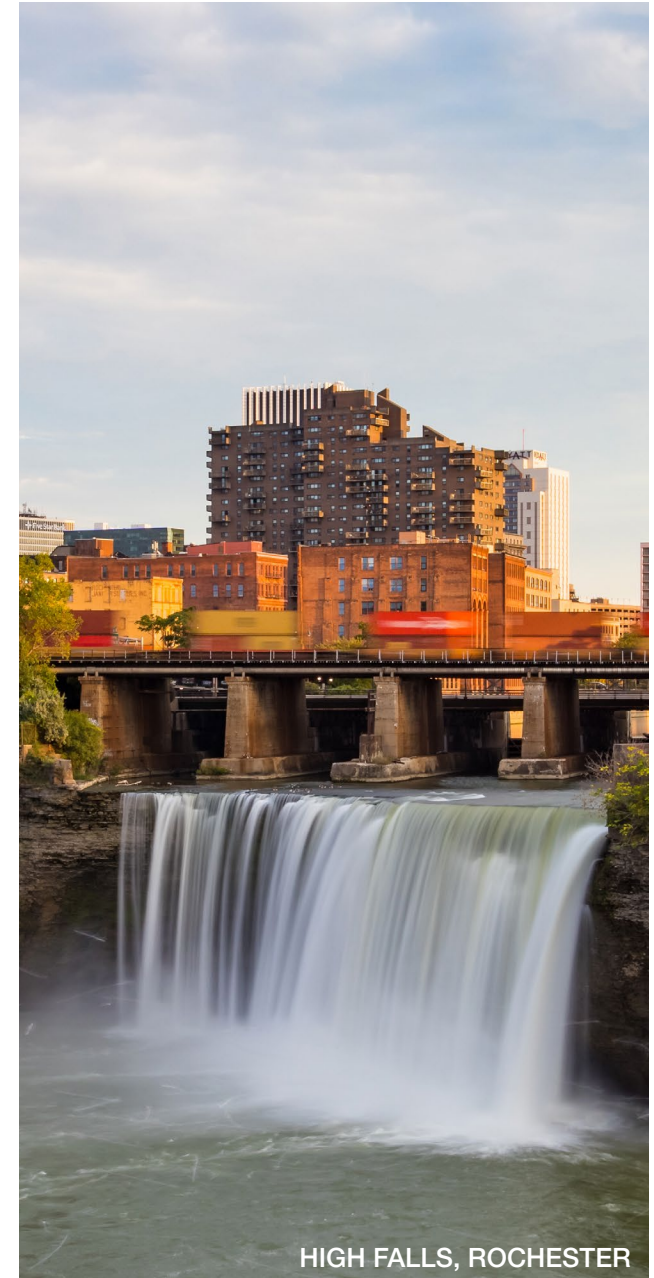
The primary purposes of this report are to:

- Examine WNY's tourism landscape at a regional scale, including the principal assets that support outdoor recreation and cultural tourism in WNY.
- Explore regional brand identity factors for WNY.
- Identify other regions with similar tourism assets and brand identities and understand where they are finding success through investment, partnership, and/or promotional strategies; and
- Provide information that supports future strategic planning, coordination, promotion and investment in WNY's tourism landscape.

REPORT DEVELOPMENT

The process to develop this report included the following steps:

- An inventory and analysis of the WNY's principal outdoor recreation and cultural tourism assets.
- An inventory of tourism and tourism-supportive businesses in WNY.
- A review of prior and ongoing regional and sub-regional branding and marketing efforts.
- A review of relevant regional and statewide plans and studies.
- Identification and analysis of case study regions with similar assets and characteristics to WNY.
- An in-person regional "grand tour" of WNY's communities, landscapes, and tourism assets.
- Engagement with dozens of regional stakeholders through virtual focus groups, in-person workshops, and one-on-one conversations.
- Regular meetings of Project Advisory Committee with representatives from New York State Parks, Natural Heritage Trust, Empire State Development, and the Ralph C. Wilson, Jr. Foundation.



HIGH FALLS, ROCHESTER

- **Greater Niagara:** Erie, Genesee, Niagara, Orleans, & Wyoming Counties
- **Chautauqua-Allegheny:** Allegany, Cattaraugus, & Chautauqua Counties
- **Finger Lakes:** Livingston & Monroe Counties



ABOUT THE STUDY AREA

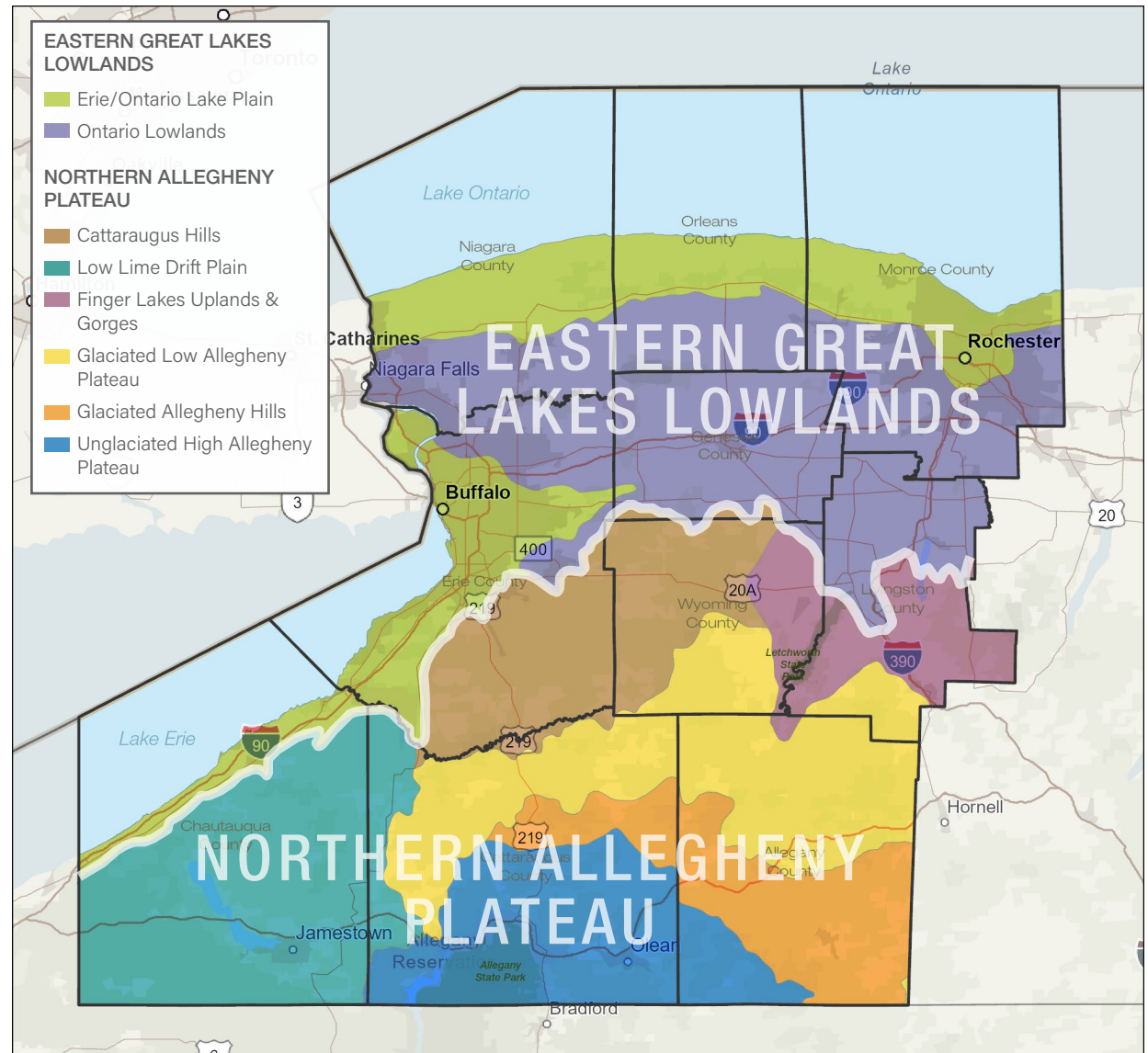
ECOLOGICAL REGIONS

The diverse ecological landscapes of WNY support a variety of outdoor recreation activities and are highly influential to the development and cultural identity of the region. WNY contains eight distinct ecological regions, with different topographies, land uses, habitats, and climates. Elevations range from over 2,500 feet above sea level in Allegany County to less than 250 feet along the shores of Lake Ontario. Most of the region was covered by glaciers during the last glacial period, significantly influencing modern-day terrain and ecosystems. Lakes and waterways are another major influence, with the temperature moderating effects of the Great Lakes supporting diverse habitats and agricultural products and major rivers influencing historical development patterns.

EASTERN GREAT LAKES LOWLANDS

ERIE/ONTARIO LAKE PLAIN

This plains region is generally characterized by flat topography along the shores of Lakes Erie and Ontario. Notable exceptions include the Niagara Escarpment (over which Niagara Falls runs) and beachside bluffs along the Great Lakes. Lake-moderated continental climate combined with flat topography has made this a prime agricultural region, including supporting the region's vineyards. Lakeshore and waterway access combined with suitable terrain supported the development of the region's large urban centers (Buffalo, Rochester) in this ecological zone.



The U.S. Environmental Protection Agency (EPA) has published a comprehensive set of ecoregions for New York State, based on regional variations in geology, physiography, vegetation, climate, soils, land use, wildlife, and hydrology.

ABOUT THE STUDY AREA

ONTARIO LOWLANDS

This lowlands region is characterized by gentle rolling terrain, including glacial features like moraines and kettles. Original forests have largely been cleared and replaced by agricultural uses; remaining forests are fragmented. The influence of the Great Lakes contributes to a humid continental climate with an unusually long growing season, supporting diverse agricultural production.

NORTHERN ALLEGHENY PLATEAU

CATTARAUGUS HILLS

The Cattaraugus Hills are characterized by broad-shaped hills with some steeper stream valleys. The area includes a mix of forested and agricultural landscapes, with **Northern Hardwood forest** being the primary forest cover. Agriculture is mostly dairy and livestock production.

LOW LIME DRIFT PLAIN

The Low Lime Drift Plain is generally made up of broad, rolling hills and valleys, as well as glacial features such as moraines and kettles. Agricultural soils are generally not as prime as areas to the north; however, there is still significant agricultural activity. Despite being located in close proximity to Lake Erie to the northwest, most of this region's waters flow south as part of the Allegany River watershed.

FINGER LAKES UPLANDS AND GORGES

The Finger Lakes Uplands and Gorges is a transitional region between the Northern Allegheny Plateau and the Ontario Lowlands. Glaciation of soft shale bedrock has formed dramatic valleys and linear lakes, such as Letchworth Gorge and Conesus Lake. Soils are generally suitable for agricultural production, particularly where there are limestone-rich deposits of glacial till.

GLACIATED LOW ALLEGHENY PLATEAU

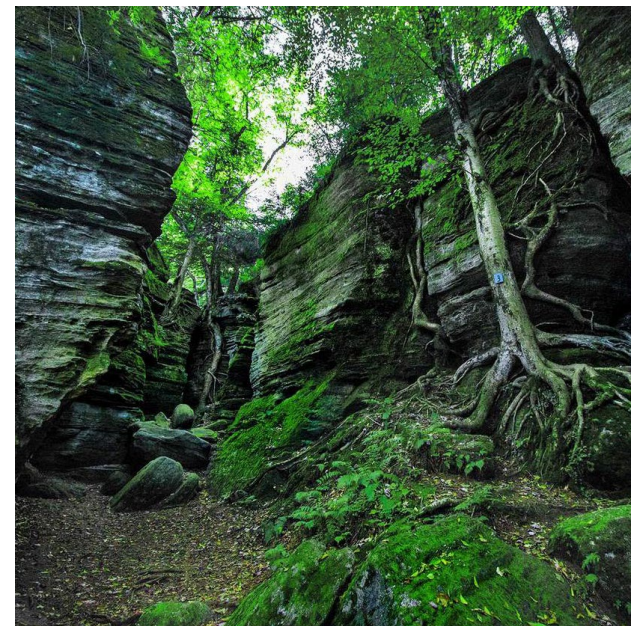
This elevated region of the Allegheny Plateau was glaciated and has generally smoother terrain than areas to the south on the plateau. Rolling hills, lakes and bogs, and wide valleys are notable terrain features. Significant agricultural resources are present and are more suitable for production of dairy and livestock than vegetable crops.

GLACIATED ALLEGHENY HILLS

This area of the Allegheny Plateau was glaciated but retained a more rugged topography, thanks to erosion-resistant bedrock. This area is generally more forested than the neighboring Glaciated Low Allegheny Plateau, with topography and nutrient-poor soils limiting agricultural opportunities and historical settlement patterns. Extending into northern Pennsylvania, this region forms the headwaters of the Genesee River, which flows north, descending from the Allegheny Plateau before eventually reaching Lake Ontario.

UNGLACIATED HIGH ALLEGHENY PLATEAU

These higher elevation areas of the Allegheny Plateau were largely unaffected by the most recent glacial period, yielding more rugged terrain consisting of small mountains and tight valleys. Mountain peaks in Allegany State Park reach over 2,300 feet. The region is largely forested, with topography and nutrient-poor soils limiting agricultural opportunities. Higher elevations have traditionally supported a more consistent winter snowpack than other areas of WNY. Holiday Valley, WNY's largest ski area, is located on the northern edge of this region.



Panama Rocks Scenic Park in Chautauqua County. Source: *ILoveNY*

ABOUT THE STUDY AREA

THE WNY TRAVELSHED

INTRA-REGIONAL CONNECTIVITY

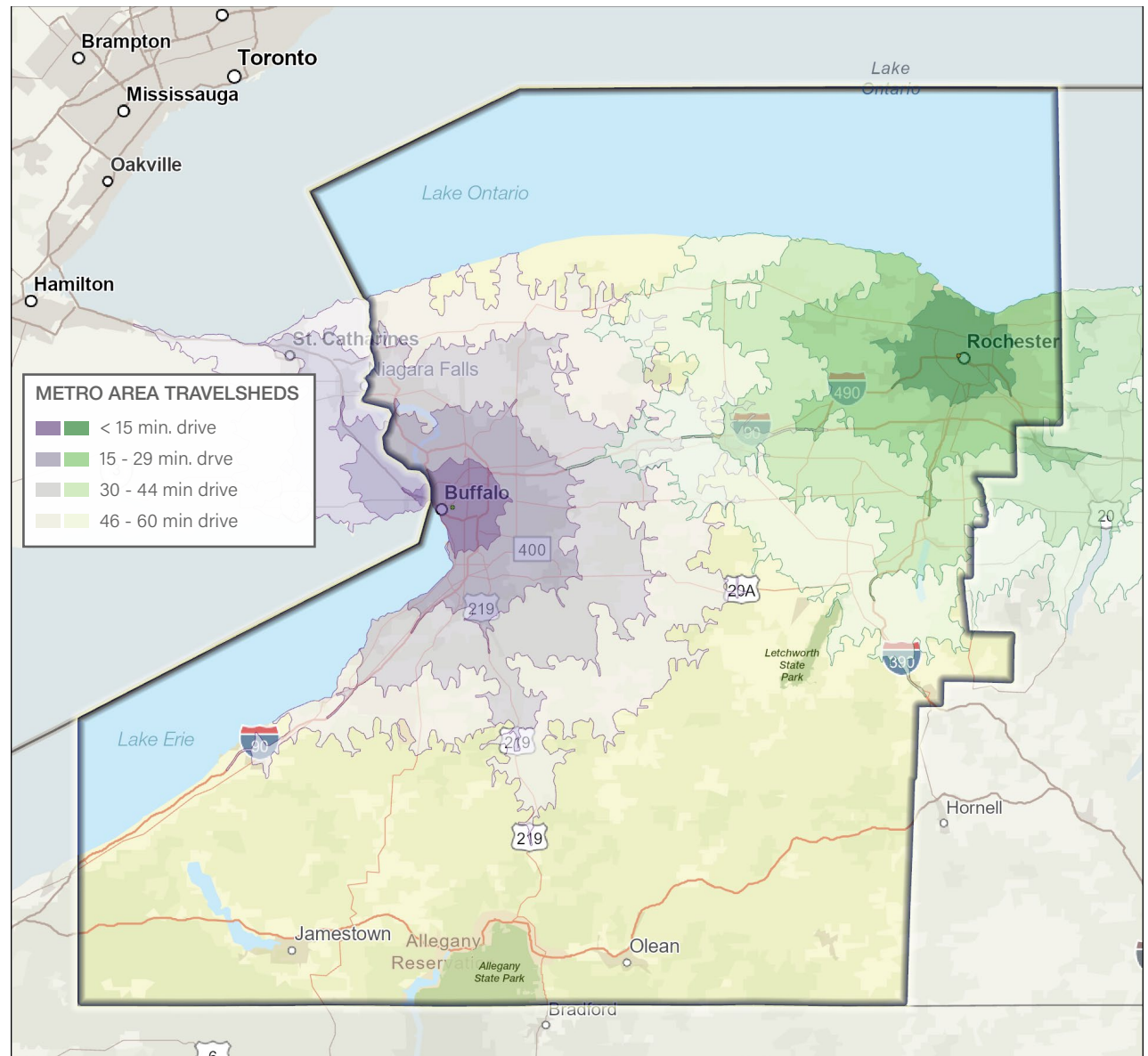
Despite covering ten counties, WNY's geography is well-suited for regional tourism. The region's well-connected highway system means that most regional tourism destinations are within a two-hour drive of the region's urban centers under typical traffic conditions. Interstates 86, 90, and 390 form a ring around most of WNY, connecting Rochester, Buffalo, Lake Erie, and southern counties. Interior regional connections are provided by a variety of US and NYS highways.

REGIONAL ACCESS

WNY is within a half-day's drive (4-5 hours) of the following population centers:

- Greater Toronto Area (pop. 6.7 million)
- Hamilton, ON, CA Metro (pop. 785k)
- Syracuse, NY Metro (pop. 663k)
- Albany, NY Metro (pop. 1.2 million)
- Cleveland, OH Metro (pop. 2.2 million)
- Akron, OH Metro (pop. 702k)
- Pittsburgh, PA Metro (pop. 2.5 million)

WNY also features three international airports (Buffalo Niagara, Niagara Falls, and Greater Rochester) as well as Amtrak passenger rail service to Buffalo, Rochester, and Niagara Falls.



Map of driving distances from WNY's major urban centers. Each highlighted region represents a 15-minute drive under typical traffic conditions.

ABOUT THE STUDY AREA

SENECA NATION

The Seneca were once the largest of six Native American nations comprising the Iroquois Confederacy. Seneca territory stretched across WNY and the Finger Lakes. As the westernmost nation of the Iroquois Confederacy, the Seneca are known as the “Keepers of the Western Door.” Today, the Seneca Nation has over 8,000 enrolled citizens and three territories in WNY and are a key regional partner in WNY’s tourism landscape.

VISITOR ECONOMY MANAGEMENT OFFICE

Recognizing the importance of tourism to the nation’s economy, the Seneca Nation has established the Visitor Economy Management Office (VEMO). The office is charged with advancing economic development in the Nation through growth and management of tourism. The stated goal of the VEMO is to “benefit the local resident first” by sharing and fostering pride in Seneca culture. Key duties of the VEMO include branding, marketing, regional collaboration, event coordination, research, and advocacy.

2022 SENECA NATION DESTINATION MANAGEMENT PLAN

In 2022, the VEMO prepared the first destination management plan for the Seneca Nation. The planning process revealed strong support for pursuing economic development through tourism. The plan identifies a variety of strategies for long-term growth and stewardship of a tourism economy in the Seneca Nation. Since the completion of the plan, the VEMO has worked to advance plan strategies and principles.





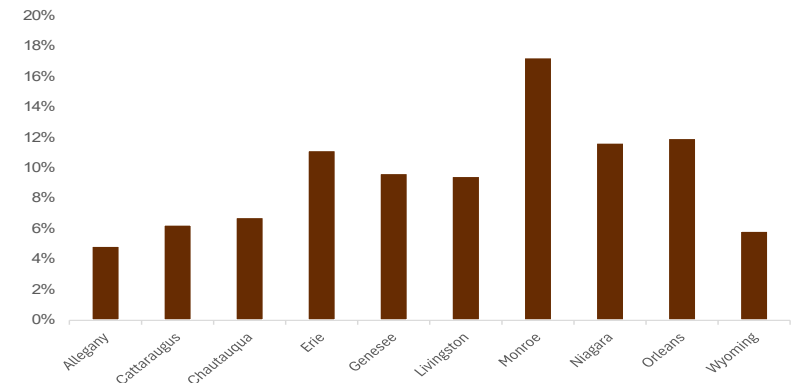
ECONOMIC IMPACT OF TOURISM

According to the annual *Economic Impact of Visitors in New York* report, visitors to WNY spent over \$6 billion in 2023. Visitors spent the most in Erie (\$2.4 billion), Monroe (\$1.5 billion), and Niagara Counties (\$1.1 billion). There was notable visitor spending in the more rural Cattaraugus and Chautauqua Counties as well (\$316 million and \$314 million, respectively). Visitor spending grew by at least 4% in all WNY counties between 2019 and 2023, with Erie, Monroe, Niagara, and Orleans Counties seeing over 10% growth. The share of tourism-generated employment is significant for many counties in WNY, reaching as high as 24% in Niagara County.

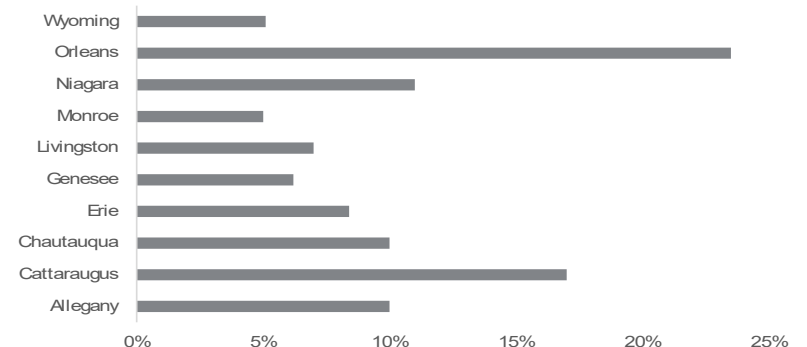
TOTAL VISITOR SPENDING (MILLIONS OF \$)

	LODGING	RECREATION	FOOD & BEVERAGE	RETAIL & SERVICE STATIONS	TRANSPORT	SECOND HOMES	COUNTY TOTAL
ALLEGANY	\$4	\$2	\$18	\$6	\$0	\$54	\$83
CATTARAUGUS	\$46	\$66	\$96	\$54	\$3	\$52	\$316
CHAUTAUQUA	\$107	\$7	\$78	\$42	\$30	\$50	\$314
ERIE	\$455	\$267	\$1,033	\$465	\$181	\$23	\$2,423
GENESEE	\$24	\$19	\$60	\$23	\$12	\$3	\$140
LIVINGSTON	\$18	\$2	\$34	\$13	\$2	\$7	\$77
MONROE	\$480	\$68	\$517	\$261	\$156	\$9	\$1,492
NIAGARA	\$193	\$284	\$343	\$208	\$48	\$5	\$1,082
ORLEANS	\$3	\$8	\$15	\$6	\$1	\$10	\$42
WYOMING	\$12	\$11	\$22	\$12	\$2	\$14	\$71
TOTAL	\$1,341	\$733	\$2,215	\$1,090	\$436	\$227	\$6,040

VISITOR SPENDING GROWTH, 2019-2023



TOURISM GENERATED EMPLOYMENT (% OF OVERALL EMPLOYMENT), 2023



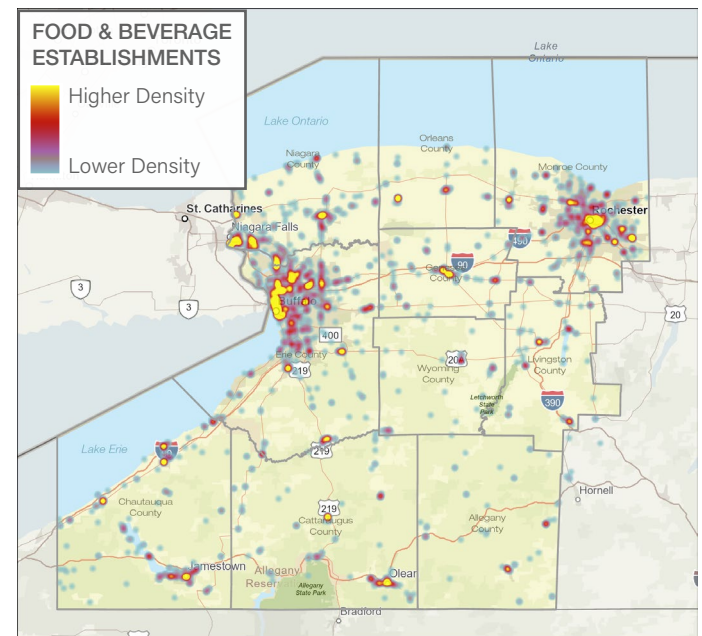
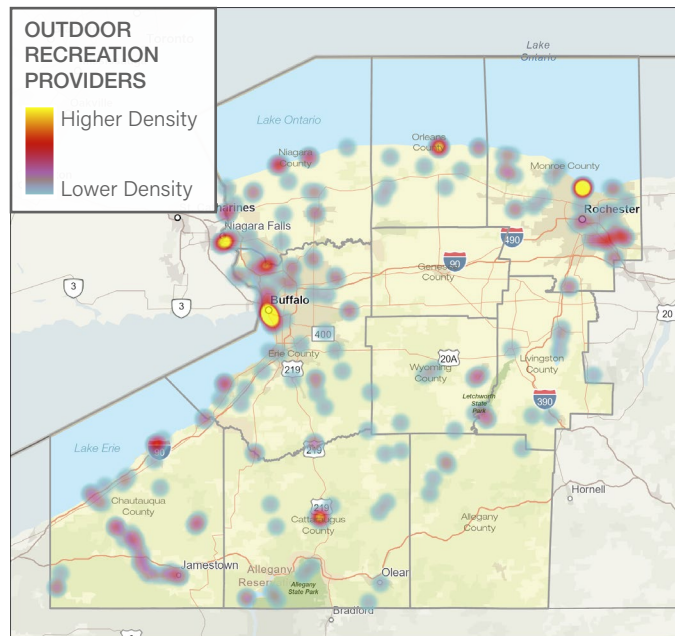
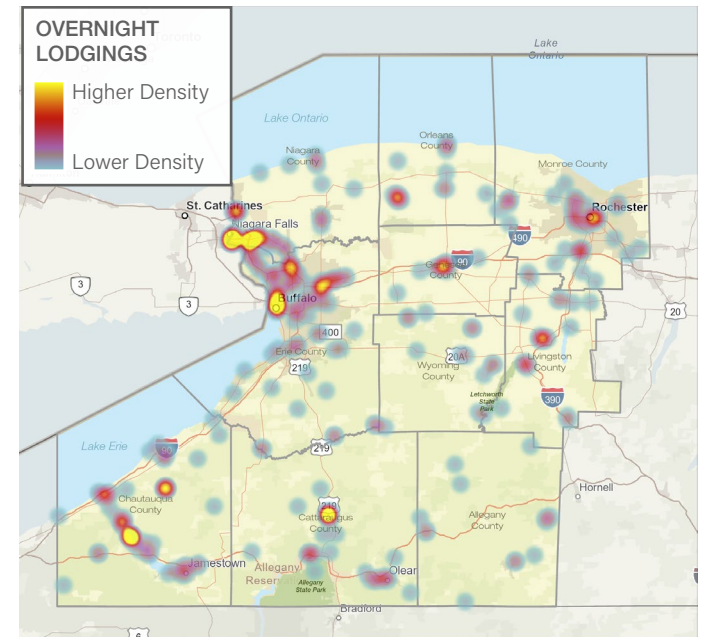
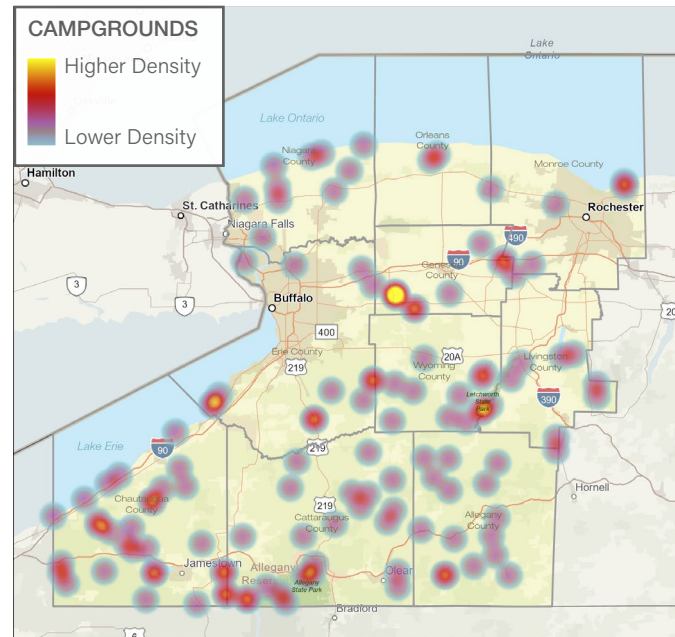
Data Source: *Economic Impact of Visitors in New York, 2023*. Prepared by Tourism Economics for Empire State Development.

REGIONAL OVERVIEW: WESTERN NEW YORK TOURISM

TOURISM-SUPPORTIVE BUSINESSES

Overnight accommodations, food and beverage establishments, and outdoor recreation provider businesses (e.g., guides, outfitters, ski areas, boat rentals) are critical services for tourism. These businesses activate outdoor recreation experiences and support extended visits to communities and regions and are one of the primary means by which tourism generates local economic impact. Tourism regions that lack these businesses often struggle with the “chicken and egg” problem of trying to boost visitation and generate market demand for these services.

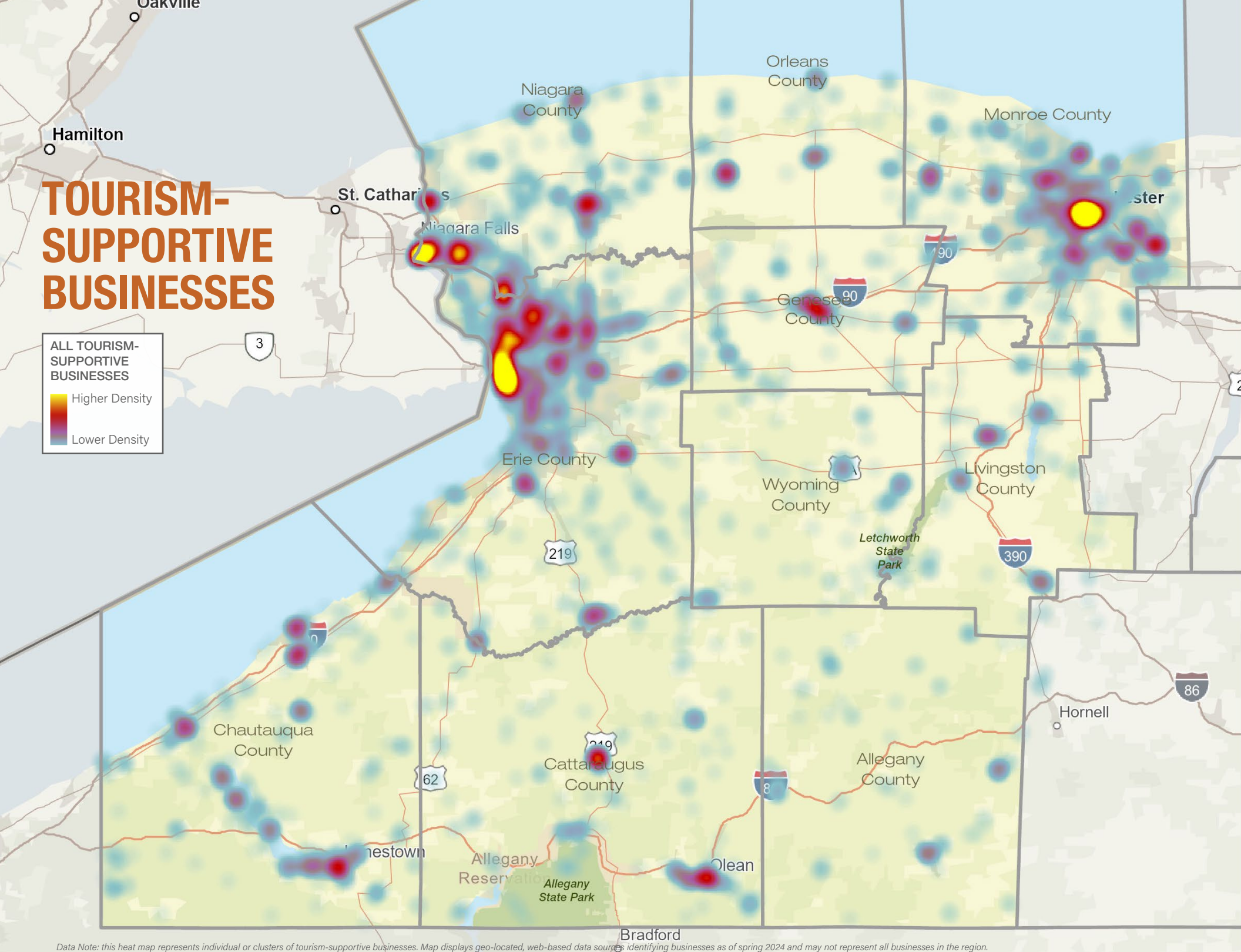
Overall, WNY is well-served by tourism-supportive businesses. The region's large urban centers are hubs of hospitality, with a variety of culinary offerings and overnight accommodations. In rural areas, campgrounds, small inns, short-term rentals, and local eateries provide services to sustain tourism experiences. Clusters of hospitality businesses are found around some of the WNY's rural outdoor recreation and cultural destinations, such as Chautauqua Lake and Holiday Valley Ski Resort.



Data Note: these heat maps represent individual or clusters of tourism-supportive businesses. Maps display geo-located, web-based data sources identifying businesses as of spring 2024 and may not represent all businesses in the region.

ALL TOURISM-SUPPORTIVE BUSINESSES

Higher Density
Lower Density



Data Note: this heat map represents individual or clusters of tourism-supportive businesses. Map displays geo-located, web-based data sources identifying businesses as of spring 2024 and may not represent all businesses in the region.

REGIONAL OVERVIEW: WESTERN NEW YORK TOURISM

WNY'S STATE PARKS

OVERVIEW

WNY is home to 31 state parks, ranging from small lakeside beaches to the 64,800-acre Allegany State Park. In 2023, there were 16,907,796 visits to state parks in WNY, accounting for 20% of all state park visits in New York State. Niagara Falls State Park is the most-visited state park in New York State, with 9,383,839 visits in 2023.

PULSE OF THE PARKS REPORT

STATEWIDE TRENDS

The 2024 *Centennial Pulse of the Parks* report, prepared by the Open Space Institute, identified a number of trends and roles for state parks, including:

- State parks serve a critical role in **physical**, social, and mental well-being of communities and families.
- State parks serve diverse visitors that have a broad range of recreational interests.
- State park visitors universally value recent investments and improvements in state parks and want to see additional enhancements to amenities and services.

The *Pulse of Parks* report also identifies challenges and opportunities for State Parks, including improved operational support and programming and expanding State Park offerings and amenities to meet growing public demand for recreational experiences.

WNY STATE PARKS

As part of the *Pulse of Parks* report, visitors to Allegany, Buffalo Harbor, Fort Niagara, Hamlin Beach, Lake Erie, and Letchworth State Parks were surveyed. Nearly one-third (31%) of visitors to these WNY State Parks are non-local visitors, including 19% who travel from out of state. Nearly one-third (30%) of visitors to these State Parks were first-time visitors. The report attributes this trend to the number of WNY state parks "with large tourist appeal."

The most popular activities at surveyed WNY State Parks were camping (27% of survey respondents), walking (26%), hiking (25%), swimming (25%), and enjoying scenery (25%).

ECONOMIC IMPACT OF STATE PARKS

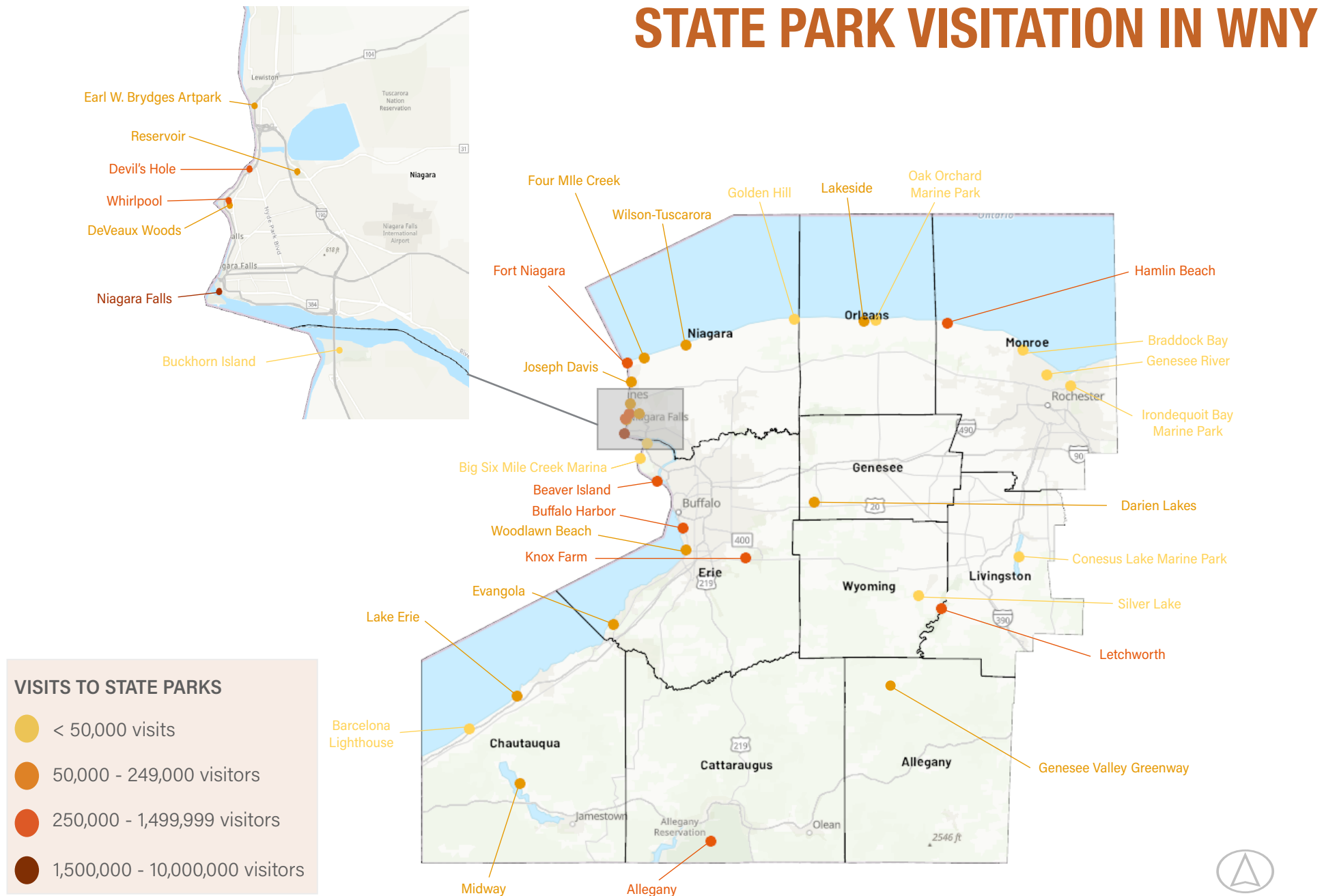
These 31 State Parks are part of a statewide park system that generates \$5.6 billion in visitor spending annually, according to a 2024 study by Parks & Trails New York. This includes \$2.9 billion in spending by non-local visitors. The study found that every \$1 million invested in New York State Parks creates \$10 million in sales and \$4 million in labor income.



Niagara Falls State Park is one of the most-visited natural attractions in the United States. Compared to National Park Service units, only Great Smoky Mountains National Park sees more visitors annually. In 2023, there were more visitors to Niagara Falls State Park (9.3 million) than Yellowstone National Park and Grand Canyon National Park combined (9.2 million).

REGIONAL OVERVIEW: WESTERN NEW YORK TOURISM

STATE PARK VISITATION IN WNY





HIKING

Hiking typically takes place on trails in natural settings, and can range from short walks on well-established paths to multi-day, long-distance backpacking trips. Hiking is a common “gateway” activity for people that are newer to outdoor recreation, with fewer skill and gear requirements than many other outdoor recreation activities.

HIKING OVERVIEW

There are opportunities for hiking across most areas of WNY. State Parks and Forests, county parks, and nature preserves host a variety of hiking opportunities around the region. Hiking trails tend to be more concentrated and extensive on the **Northern Allegheny Plateau** where there is more mountainous terrain and larger areas of protected forest and public land.

- Interacting with water features, such as waterfalls, gorges, streams, and ponds.
- Access to natural areas (forests, marshes, meadows).
- Multi-day backpacking excursions on the Finger Lakes Trail (now part of the North County National Scenic Trail).

PARTICIPATION

Day hiking is the most popular outdoor recreation activity tracked by the Outdoor Industry Association, with an estimated 20% of Americans participating in hiking at least once per year (*Outdoor Industry Association, 2024*).

PRIVATE SECTOR PROVIDERS

There are at least 15 guide services that are licensed through New York State to offer guided hiking and/or backpacking outings in WNY. This is indicative of visitor interest in hiking as well as demand for guided experiences.

TOURISM ROLE

PRIMARY ATTRACTIONS

There are a number of hiking destinations in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors. These destinations are likely competitive with other regions that are known for hiking experiences and include:

- **Niagara Gorge Trail System:** trails through multiple state parks offering stunning views of the falls and Niagara River Gorge, including Cave of the Winds **boardwalk**, Great Gorge Railway Trail, Niagara Gorge Rim Trail, and Whirlpool Trail.

A NOTE ON “PRIMARY ATTRACTIONS” AND OTHER PROVIDED EXAMPLES

WNY boasts a remarkable array of tourism assets and opportunities, many of which are highlighted throughout this report. While the report aims to offer a comprehensive overview of the region’s key attractions, it is important to note that an exhaustive list is not feasible.

The assets described in this report should be considered as representative examples. This list is not intended to be all-inclusive; it highlights primary attractions and opportunities, but many other noteworthy destinations and experiences are also part of the region’s vibrant tourism offerings.

Visitors can expect to discover even more hidden gems and attractions as they explore the area, making Western New York a destination with something for everyone.



LETCHWORTH STATE PARK

OUTDOOR RECREATION ASSETS: TRAIL-BASED RECREATION

- **Letchworth State Park:** 66 miles of hiking trails offering sweeping views of Letchworth Gorge and waterfalls, including the Gorge Trail, Finger Lakes Trail, Footbridge Trail, and Big Bend Trail. The **recently-completed** Autism Nature Trail is the first of its kind, providing an accessible trail surface and various sensory stations at regular intervals.
- **Eternal Flame Trail:** The Eternal Flame Trail in Chestnut Ridge Park leads to the stunning Eternal Flame Falls, where a small natural gas flame burns at the base, creating a unique natural phenomenon.

EVENTS & PROMOTIONAL EFFORTS

The WNY Hiking Challenge is a project of Outside Chronicles, an outdoor recreation guide service and education company based in Hamburg. This annual challenge invites hikers to complete a series of hiking challenges along 46 trails in WNY. Participants receive points for completing hikes, performing trail stewardship activities, and other challenges, all of which are tracked in a smartphone app. Rewards include stickers, patches, and public recognition. 100% of profits from registration for the WNY Hiking Challenge are donated to land preservation and trail stewardship organizations in WNY, with over \$325,000 raised to date.

In recent years, Outside Chronicles has added new WNY outdoor recreation challenges, **include** the WNY Waterfall Challenge, the WNY Urban Treks Challenge, and the Buffalo Audubon Spring Birding Challenge.



Whirlpool State Park is one of several state parks connected by the Niagara Gorge Trail System, one of the premier hiking destinations in WNY. Source: *ILoveNY*

OUTDOOR RECREATION ASSETS: TRAIL-BASED RECREATION

MOUNTAIN BIKING

Mountain biking is broadly defined as riding purposely designed bicycles on natural surface trails. There are multiple categories of mountain biking, from cross-country riding over rolling terrain to lift-served, downhill-only riding at mountain bike parks and ski areas. Mountain biking can take place on multi-purpose trails that were not originally built for mountain biking (where permitted) as well as “purpose-built” trails that are specifically designed for bikes; the latter are typically more sought after by mountain bike enthusiasts.

MOUNTAIN BIKING OVERVIEW

OPPORTUNITIES

Opportunities for mountain biking are found in pockets across the region. More extensive mountain bike trail networks tend to be concentrated and extensive in the **Northern Allegheny Plateau** where there is more mountainous terrain and larger tracts of forest and public land; there are a number of smaller networks in the greater Rochester area as well.

EXPERIENCES

- Cross-county riding over rolling terrain on multi-use trail networks.
- Purpose-built bike parks with downhill-oriented trails specifically designed for mountain bikes, including multiple networks with lift/shuttle service.

- Long-distance trail riding (Finger Lakes Trail in Letchworth State Park and the West Side & East Side Overland Trails in Chautauqua County).
- Multi-day bikepacking tours along the Eastern Divide Trail route.

PARTICIPATION

In 2022, about 2.9% of Americans aged six and older (roughly 9 million) participated in mountain biking, a 30% increase since 2007, driven largely by casual participants (i.e., those who participate once per month or less) (Sports & Fitness Industry Association, 2023).

PRIVATE SECTOR PROVIDERS

There are multiple privately-operated, fee-based bike parks in WNY, including HoliMont Bike Park and Kissing Bridge Ski Area. Loud Performance operates a mountain bike rental service for HoliMont Bike Park.

TOURISM ROLE

PRIMARY ATTRACTIONS

There are several mountain biking destinations in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors. Popular mountain bike destinations typically offer significant trail system mileage, a variety of terrain for riders of different ability levels, and high-quality trail design and maintenance.

- **Ellicottville:** home to lift-served downhill mountain biking at HoliMont Bike Park and over 35 miles of cross country trails in McCarty State Forest. The Ellicottville Loop is a 30-mile route in the state forest that has received widespread recognition through the International Mountain Bike Association's EPICS route program.
- **Chautauqua County:** home to multiple well-regarded trail networks, including the Trails at Loud, Harris Hill State Forest, Long Point State Park, and the Westside and East Side Overland Trails. Chautauqua County offers more miles of groomed winter fat-tire biking than any other county in the state.
- **Glenwood:** home to shuttled downhill riding at Kissing Bridge Ski Area and a significant network of **cross county** trails across the street at Sprague Brook.
- **Allegany State Park:** a popular attraction for park campers and a winter fat-tire biking destination.

EVENTS & PROMOTIONAL EFFORTS

There are multiple mountain biking events in WNY that draw in visitors to the region's trails. HoliMont Bike Park is a hub for events, including multiple annual race series and the annual EVL Trail Fest. Other annual mountain bike events include the Raccoon Rally and winter fat-tire biking events at Allegheny State Park and the Ales & Trails event at Kissing Bridge Ski Area. Western NY Mountain Biking Association (WNYMBA) also organizes regular community rides around the region (in addition to conducting significant trail maintenance).

OUTDOOR RECREATION ASSETS: TRAIL-BASED RECREATION

ROAD & GRAVEL BIKING

Road biking can entail anything from a short loop around a neighborhood to full-day or multi-day tours covering hundreds of miles. Traditionally, road biking has been largely confined to paved roads and bike paths. In recent years, gravel biking (i.e., biking on gravel /crushed stone roads and multi-purpose trails) has gained popularity, with manufacturers offering dedicated gravel bikes with wider tires that are more suitable for off-pavement excursions.

ROAD & GRAVEL BIKING OVERVIEW

WNY features a growing network of paved, crushed stone, and natural surface trails for road and gravel bikes, such as the Empire State Trail, Genesee Valley Greenway, Lehigh Valley Trail, and Chautauqua Rail-Trail. These trails typically offer smooth surfaces and minimal grade changes. Most trails are in the flat Eastern Great Lakes Lowlands, while the rugged Northern Allegheny Plateau offers fewer options, but trail connections do exist.

EXPERIENCES

- Cruising on paved trails that offer safe and convenient bicycling experiences through more developed urban and suburban areas.
- Riding on crushed stone and natural surface trails that offer journeys into forested and agricultural areas along corridors of historical significance.
- Connecting from trails into adjacent villages and Main Streets as part of a “Trail Town” experience.

PARTICIPATION

REGIONAL PARTICIPATION

Trail counts conducted by Parks & Trails New York demonstrate strong participation in road and gravel biking in WNY:

- **Erie Canalway Trail:** in 2023, there were an estimated 47,124 visits to the trail in Lockport and 145,955 visits to the trail in Rochester.
- **Genesee Valley Greenway:** in 2023, there were an estimated 97,314 total visits from an estimated 38,392 total visitors. This represented an approximate doubling of visitation to the trail since 2017.

NATIONAL TRENDS

Bicycling is the fifth-most popular outdoor recreation activity tracked by the Outdoor Industry Association, with 17.2% of Americans

participating in bicycling at least once per year; road biking **accounting** for the vast majority of these participants (*Outdoor Industry Association, 2024*). Participation in road biking increased by 12% from 2017 to 2022 (*Sports & Fitness Industry Association, 2023*).

PRIVATE SECTOR PROVIDERS

There are a number of private businesses that support bicycle excursions and tours in WNY, with a particular focus on the Erie Canalway Trail. Multiple companies offer e-bike rentals, shuttle services, and supported multi-day tours on the trail. E-bike rentals and tours are cropping up in other areas of the region; there are multiple e-bike rental and tour companies operating in the Buffalo-Niagara area.

TOURISM ROLE

PRIMARY ATTRACTIONS

There are several road and gravel biking destinations in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors, including.

- **Erie Canalway / Empire State Trail:** the Erie Canalway Trail is part of the 750-mile Empire State Trail, a growing trail network connecting New York City, Albany, Buffalo, and the Adirondacks. In WNY, the Erie Canalway Trail is a near-continuous off-road trail between Rochester and Buffalo, connecting through many towns and villages along a **federally-designated** National Heritage Corridor.

OUTDOOR RECREATION ASSETS: TRAIL-BASED RECREATION

- **Shoreline Trail / Niagara Gorge Trail**
System: the Shoreline Trail is an expanding network of bicycle paths connecting key destinations along the Niagara River Greenway corridor. The trail accesses Niagara Falls State Park from Buffalo, Tonawanda, and Grand Island, and continues north along the rim of the lower Niagara River Gorge, affording sweeping views of the river below and providing access to multiple other state park sites, such as Whirlpool State Park.
- **Genesee Valley Greenway State Park:** the Genesee Valley Greenway forms a 90-mile long open space corridor that largely follows the Genesee River between Rochester and the Village of Cuba, with plans for an extension to Hinsdale. The trail connects through pastoral landscapes and historic town centers. Connections to town centers are being activated through the Genesee Valley Trail Town Initiative. Work is ongoing to improve the trail surface to accommodate a greater variety of users.

EVENTS & PROMOTIONAL EFFORTS

There are many road and gravel biking events in WNY that draw in visitors to the region. Parks & Trails New York hosts the annual Cycle the Erie Canal event, where participants cycle from Buffalo to Albany along the Erie Canalway Trail. Friends of the Genesee Valley Greenway hosts regular events on the trail, including the Greenway Cycle Challenge. Other events include Ride for Roswell to End Cancer, hosted by Roswell Park, and the SkyRide over the Skyway in Buffalo hosted by GoBike.



Allegany State Park. Source: *ILoveNY*

OUTDOOR RECREATION ASSETS: TRAIL-BASED RECREATION

SNOWMOBILING

WNY has vast snowmobiling opportunities across thousands of miles of **publicly-accessible** trail. These trails use public and private lands and are well-integrated into the region's communities, with trails connecting into Main Streets and downtown areas.

SNOWMOBILING OVERVIEW

OPPORTUNITIES

There are thousands of miles of snowmobile trails in WNY. There is an interconnected network of trails stretching across the entire region, with State-funded Corridor and Secondary trails providing vital regional trail connections. Snowmobile trail density is greatest in WNY's rural central counties (Wyoming, Genesee) and in southern areas on the Northern Allegheny Plateau. Chautauqua County and Cattaraugus Counties each boast over 400 miles of trail.

EXPERIENCES

- Mellow cruises along regional rail trails.
- Adventurous tours in mountainous terrain.
- Extended regional tours using Corridor and Secondary trails.

PARTICIPATION

NATIONAL TRENDS

The International Snowmobile Association estimates that there are over 4 million regular participants in snowmobiling in the U.S., largely clustered in northern and mountainous regions.

TOURISM ROLE

WNY offers an impressive variety of snowmobiling along an interconnected region network, with appeal to a variety of snowmobilers. Snowmobile connections to a variety of destinations **is** another tourism asset, with trails accessing eateries, resorts, and Main Street. In 2021, Snow Goer magazine recognized Byrnecliff Golf Resort in Varysburg as one of America's "101 Great Trailside **Pitstops**"; the resort is located at the intersection of four major snowmobile trails and offers riding through trails and fields, warm meals, and lodging.



Climate challenges: warming temperatures are a challenge for maintaining snowmobile trail networks, which require consistent snowpack. In the 2023/2024 season, the snowmobile trails in Allegany State Park did not open, despite this being one of the highest-elevation areas in WNY.

Photo Source: ILoveNY



FISHING

Fishing takes place in lakes, ponds, rivers, and streams across WNY. Fishing can take a variety of forms, from casting from urban fishing piers to chartered Great Lake fishing excursions to hiking to reach coldwater trout streams.

FISHING OVERVIEW

OPPORTUNITIES

There are opportunities for fishing across WNY's plentiful lakes, ponds, rivers, and streams. Between coldwater streams flowing off the Northern Allegheny Plateau, the deep waters and tributary streams of the Great Lakes, and inland lakes of ponds of various sizes and depths, there is a tremendous variety of fish habitat across the region. NYSDEC's fish stocking program is critical to supporting these fisheries, with over 1.75 million fish stocked in WNY counties in 2023.

EXPERIENCES

- Fishing the Great Lakes and inland lakes for trophy fish species via personal or chartered watercraft.
- Fly fishing for trout and other species on tributaries and streams.
- Shoreline fishing for bass, pike, and panfish at warmwater sources.
- Ice fishing on lakes and ponds in the winter.

PARTICIPATION

REGIONAL PARTICIPATION

In the 2023-2024 season, there were more fishing licenses sold in Erie and Monroe Counties (132,590 and 82,108 licenses, respectively) than any other New York State county. Chautauqua County ranked sixth among counties (59,786 licenses sold). Statewide license sales have remained steady at or near 2.5 million licenses sold per year over the previous ten years.

NATIONAL TRENDS

Fishing is the second-most popular outdoor recreation activity tracked by the Outdoor Industry Association, with 18.2% of U.S. Residents participating in fishing at least once per year (*Outdoor Industry Association, 2024*).

PRIVATE SECTOR PROVIDERS

There are at least 16 guide services that are licensed through New York State to offer guided fishing outings in WNY. Fishing guide and charter services are generally clustered along the Great **Lake** shorelines (see map on page 25).

TOURISM ROLE

PRIMARY ATTRACTIONS

There are many fishing destinations in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors, including:

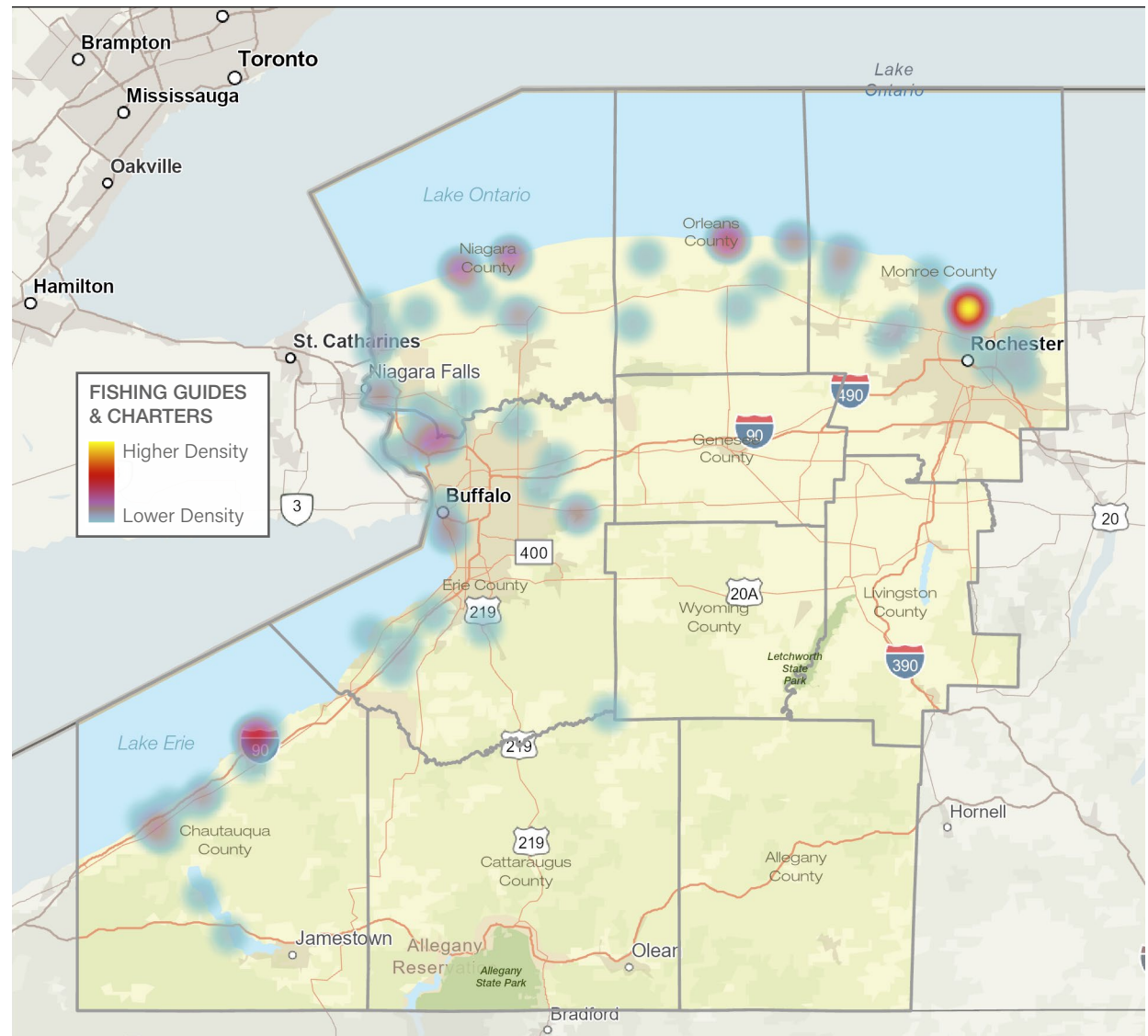
- **Lake Erie & Tributaries:** the "Walleye Capital of the World," Lake Erie is the most productive commercial fishery of the Great Lakes and is known for its steelhead, bass, perch, and lake trout fishing. Steelhead fishing primarily takes place on the lake's tributaries, collectively known as "Steelhead Alley," with the Canadaway, **Chautauqua** and Eighteen Mile Creeks being the most popular among steelhead anglers.
- **Lake Ontario & Tributaries:** situated between Lake Erie and the St. Lawrence Seaway, Lake Ontario offers similar fishing opportunities while also having the distinction of hosting prized populations of Chinook and Coho salmon. Similar to Lake Erie, steelhead fishing primarily takes place on tributary streams, and excellent salmon fishing is found on these streams as well. Popular tributaries for fishing include the Niagara River, Oak Orchard River, Marsh Creek, Sandy Creek, and the lower Genesee River.
- **Allegany State Park:** there are a variety of fishing opportunities in this park, ranging from easily accessible trout-stocked lakes to wild trout streams.

OUTDOOR RECREATION ASSETS: WATER-BASED RECREATION

- **Upper & Lower Niagara River:** the Niagara River is its own destination, thanks to its role as a primary tributary to Lake Ontario and a tremendous flow rate that keeps the river **ice free** all winter. *Game and Fish Magazine* calls the Niagara River “the east’s hottest multi-species fishery, even during the coldest months of the year.” Below Niagara Falls, the **14 mile** stretch of river is a well-known salmon and steelhead fishery, while the upper river is regarded for its muskellunge fishing.
- **Chautauqua Lake:** notable for its length (17.5 miles) and elevation (1,308 ft above sea level), Chautauqua Lake is known for excellent muskellunge fishing and was ranked the #21 Best Bass Lake in the northeast by *Bassmaster* magazine in 2023.

EVENTS

There are a variety of annual fishing events in WNY that draw in visitors to the region. Lake Erie and Lake Ontario both host multiple large fishing tournaments annually, including the Sunset Bay Walleye Shootout, the Wilson Harbor Invitational, and the Lake Ontario Pro/Am Series. Chautauqua Lake is home to the annual Falleye Classic, while there are a number of smaller fishing tournaments held regularly on lakes around the region, such as Conesus Lake and Silver. Creeks and rivers throughout WNY also host a number of trout **derby's**, including the Tri-County Trout Derby in Wyoming County.



Heat map of fishing guide and charter operators in WNY. Most fishing guides and charters in WNY are clustered along the Great Lakes shoreline and tributaries.

Data Note: these heat maps represent individual or clusters of businesses. Maps display geo-located, web-based data sources identifying businesses as of spring 2024 and may not represent all businesses in the region.

OUTDOOR RECREATION ASSETS: WATER-BASED RECREATION

BOATING

Motorized boating and sailing **takes** place on WNY's Great Lakes and inland waterbodies. Motorized boating includes operating motorized boats and personal watercraft (i.e., jet skis) as well as chartered boat tours and cruises.

BOATING OVERVIEW

WNY is home to some of New York State's largest waterbodies, with access to two Great Lakes and hosting the state's sixth-largest inland lake (Chautauqua Lake). Other waterbodies popular for boating include Silver Lake, the northern half of the Allegheny Reservoir, Cuba Lake, and Rushford Lake. Conesus Lake and Hemlock Lake, the two westernmost Finger Lakes, are also located in the region. These waterbodies are mostly found in the **Northern Allegheny Plateau** region. The Erie Canal also supports a variety of boating experiences.

OPPORTUNITIES

EXPERIENCES

- Cruising the Great Lakes and inland lakes.
- Sailing Chautauqua Lake and the Great Lakes.
- Multi-day boating tours along the Erie Canal.

PARTICIPATION

The United States Coast Guard has estimated that 26.5% of U.S. residents participate in recreational motorized boating at least once per year (*National Recreational Boating Safety Survey*, 2018).

PRIVATE SECTOR PROVIDERS

There are a number of marinas, motorized boat rental companies, and boat tour companies located throughout the region. This ranges from single-day boat rentals on inland lakes, to jet boat tours and the Maid of the Mist on the Niagara River, to vacation boat rentals along the Erie Canal (see map on page 27).

TOURISM ROLE

PRIMARY ATTRACTIONS

There are many boating experiences in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors, including:

- **Lake Ontario:** the Port of Rochester and Point Breeze are major access points for motorized boating on Lake Ontario.
- **Lake Erie:** Buffalo is a hub of motorized boating access to Lake Erie and the upper Niagara River, with a number of boat rental and boat tour operators based here.
- **Lower Niagara River:** the lower Niagara River hosts the iconic Maid of the Mist tour of Niagara Falls as well as jet boat tours that explore major rapids of the lower Niagara River.



Conesus Lake, Livonia, NY

Source: ILoveNY

OUTDOOR RECREATION ASSETS: WATER-BASED RECREATION

- **Chautauqua Lake:** Chautauqua Lake is home to a number of marinas, yacht clubs, and sailing events, attesting to its popularity as a boating destination.
- **Erie Canal:** chartered canal tours and self-skippered vacation boat rentals provide multiple avenues for single-day or multi-day, town-to-town excursions along this historic canal.
- **Buffalo Harbor State Park:** the largest public marina in New York State. The park is home to a 1,100 slip marina, a restaurant, boat launch, fish cleaning station, and pier and boardwalk.

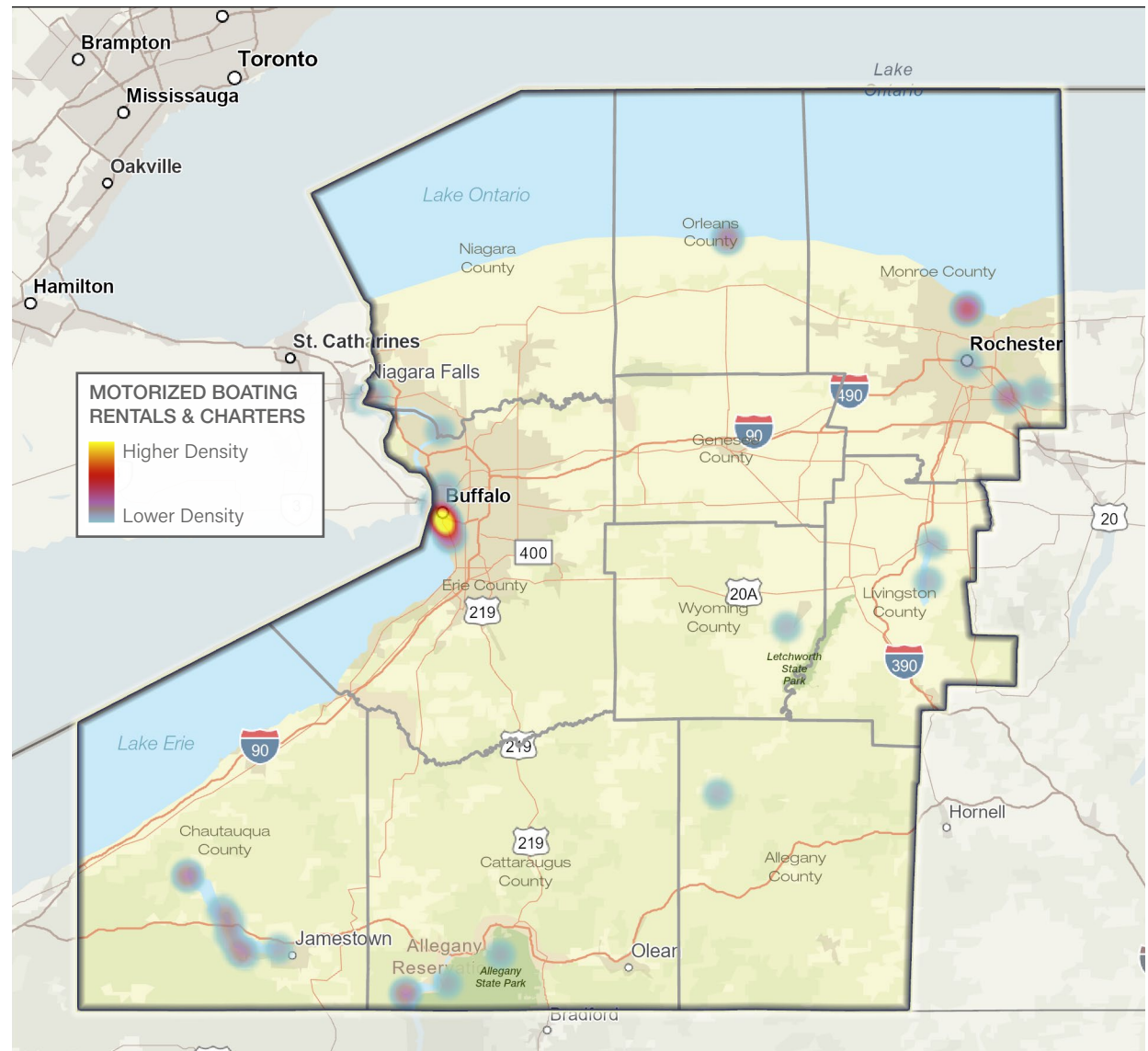
EVENTS

Chautauqua Lake hosts a number of sailing events throughout the year, including regularly-scheduled sailing races put on by the Chautauqua Yacht Club and week-long sailing courses offered by the Chautauqua Institution.



Boating on Conesus Lake

Source: ILoveNY



Heat map of motorized boating provider businesses in WNY. This includes boat rentals and boat tours.

Data Note: these heat maps represent individual or clusters of businesses. Maps display geo-located, web-based data sources identifying businesses as of spring 2024 and may not represent all businesses in the region.

OUTDOOR RECREATION ASSETS: WATER-BASED RECREATION

PADDLE SPORTS

Paddle sports include canoeing, kayaking, stand-up paddleboarding (SUP), and/or rafting in areas of flat water as well as whitewater sections of rivers and streams.

PADDLE SPORTS OVERVIEW

WNY has a tremendous diversity of waterbodies, including two Great Lakes, a number of larger and small inland lakes and ponds, navigable rivers and streams, and the Erie Canal. In contrast to motorized boating, smaller waterbodies are often just as sought after by paddlers as larger waterbodies. Many paddle-worthy waterbodies are found in the **Northern Allegheny Plateau** region. The Erie Canal, smaller lakes and ponds, and the Great Lakes shorelines provide numerous opportunities for paddling in the **Eastern Great Lakes Lowlands**.

- Navigating lakes big and small.
- Whitewater rafting and kayaking in high water.
- Paddling through natural areas with bird nesting sites.
- Following water trails and blueways.

PARTICIPATION

In 2022, approximately 4% of U.S. residents participated in kayaking at least once, approximately 3% participated in canoeing at least once, and approximately 1% participated in SUP at least once (*Sports & Fitness Industry Association, 2023*). Between 2017 and 2022, there was a 29% increase in participation in kayaking, a 3% increase in canoeing, and a 14% increase in participation in SUP.

PRIVATE SECTOR PROVIDERS

There are a number of outfitters offering kayak and/or canoe rentals throughout the region (see map on page 29). Two companies offer guided whitewater rafting and kayaking excursions, and there are several companies that will shuttle provisions for users of the Erie Canalway Water Trail.

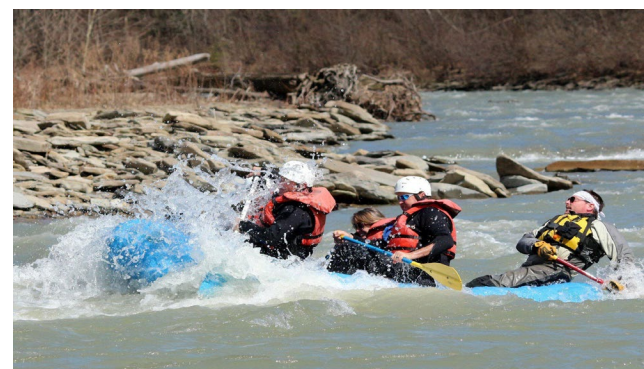
TOURISM ROLE

PRIMARY ATTRACTIONS

There are many paddling destinations in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors:

- **Zoar Valley:** during the spring and summer, Cattaraugus Creek swells to include class II, III, and IV rapids, offering a memorable whitewater rafting or kayaking experience through this deep and dramatic gorge.
- **Letchworth State Park:** a rafting or kayaking trip through the Letchworth Gorge offers incredible scenery and mellow rapids.

- **Erie Canalway Water Trail:** in total, the Erie Canalway Water Trail comprises 450 miles of interconnected canals, lakes, and rivers. In WNY, the Water Trail includes the Erie Canal as well as canal-side amenities and attractions. The Water Trail supports single-day trips as well as overnight trips between towns and cities along this historic corridor.
- **Lock 32 Paddling Center:** built along an Erie Canal spillway in Pittsford, the Lock 32 Paddling Center includes man-made class II and III whitewater features and is one of just a handful of developed whitewater parks in the Northeast.
- **Buffalo Blueway:** while many lakefront and coastal cities offer **paddlesports** access, the Buffalo Blueway takes it a step further with a coordinated and growing network of urban water access sites, waterfront amenities, and historical points of interest spanning the Buffalo River, Lake Erie, and the upper Niagara River.



Whitewater rafting in the Zoar Valley.

Source: ILoveNY



CAMPING

WNY has a variety of camping opportunities, ranging from basic car camping to State Park cabins to full-service RV parks. Camping is a classic outdoor recreation activity as well as a critical economic amenity that can support all forms of tourism.

CAMPING OVERVIEW

OPPORTUNITIES

There are camping areas located through nearly all of WNY, mostly in more rural areas. Camping opportunities in WNY are often clustered at and around outdoor recreation amenities and natural areas, such as State Parks and lakeshores.

EXPERIENCES

- Camping on the shores of the Great Lakes.
- State Park camping with convenient access to outdoor recreation experiences.
- Overnight and multi-day tours along regional trails and waterways.

PARTICIPATION

Camping is the fourth-most popular outdoor activity, with 17.7% of Americans participating in 2023 (Outdoor Industry Association, 2024).

PRIVATE SECTOR PROVIDERS

In addition to State Park camping areas, there are dozens of privately-operated camping areas throughout WNY.

TOURISM ROLE

PRIMARY ATTRACTIONS

There are a number of camping areas in WNY offering unique and exceptional experiences that can serve as **primary attractions** for prospective visitors:

- **Allegany State Park:** known as both a weekend and longer-term camping destination, Allegany State Park offers 314 campsites, 350 rustic cabins (including 17 winterized cabins), and 53 vacation rental cottages. From camping areas, visitors have easy access to trails, lakes, picnic areas, ball fields and courts, and staff-led programs.
- **Letchworth State Park:** 270 tent and trailer sites with electrical hookups, 81 cabins, and two cottages provide convenient access to the Park's trails and scenic vistas.
- **Great Lakes State Parks:** there are six State Parks with camping areas located along Great Lakes shorelines in WNY, **include** four on Lake Ontario and two on Lake Erie. These State Parks offer campers convenient access to beaches, boat launches, and other water-based recreation, in addition to scenic views from lakeside bluffs at parks on Lake Erie.



HTR Niagara Campground & Resort.

Source: ILoveNY

OUTDOOR RECREATION ASSETS: TRADITIONAL & OTHER

- **Darien Lakes State Park:** 154 campsites are conveniently located near a beach, playgrounds, fishing access, a multi-use trail system, and picnic areas.
- **Frost Ridge Park:** Year-round, full-service campground in Le Roy, NY about thirty minutes driving of Rochester. Hosts events throughout the year, including a summer concert series.

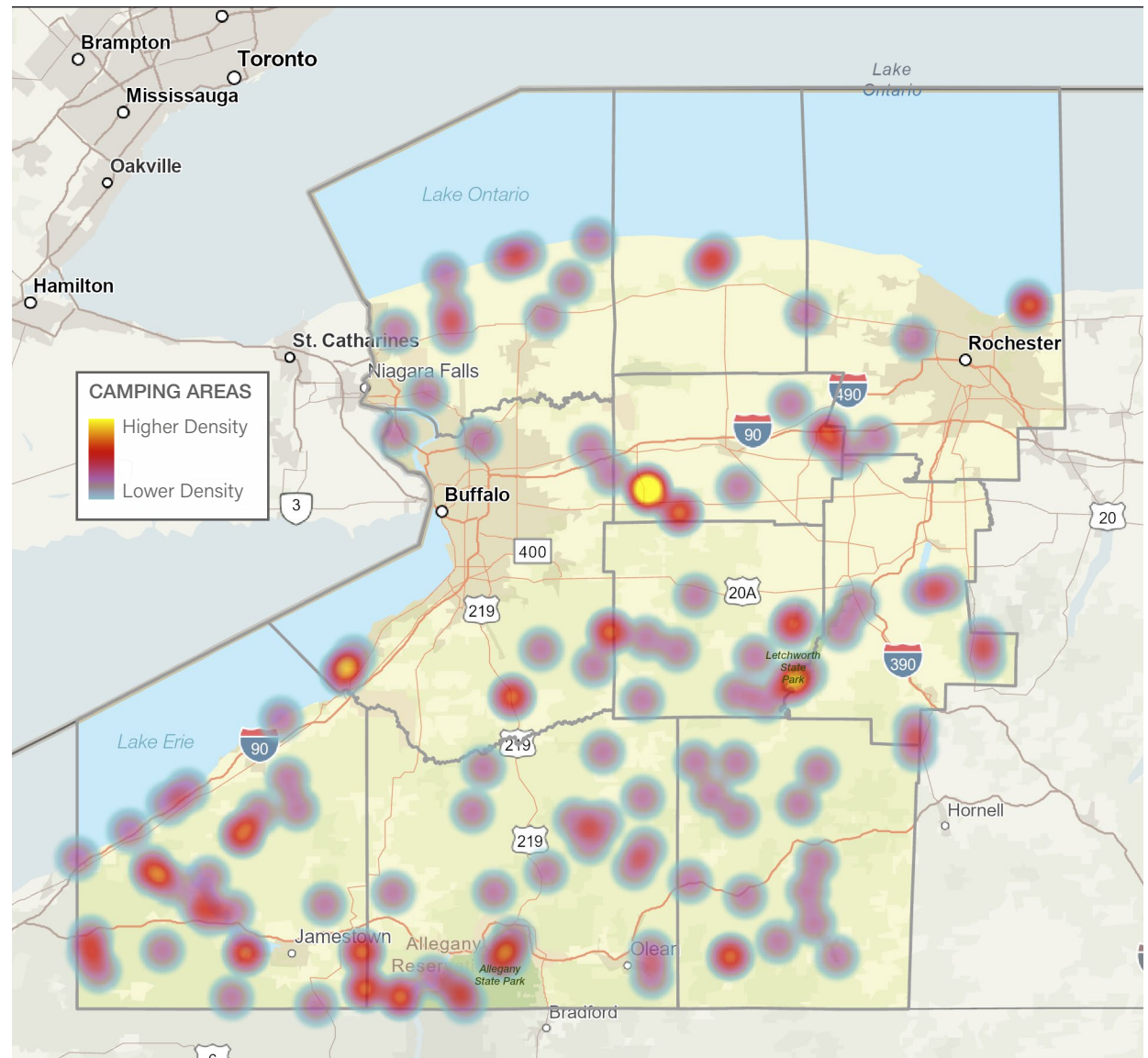
TOURISM SUPPORT

Camping areas provide a critical service to WNY's tourism industry by providing overnight stays throughout the region, particularly in more rural areas that lack other overnight accommodations.



Lake Erie State Park.

Source: ILoveNY



Heat map of camping areas in WNY.

Data Note: these heat maps represent individual or clusters of camping areas in WNY. Maps display geo-located, web-based data sources identifying camping areas as of spring 2024 and may not represent all businesses in the region.

DOWNHILL SKIING & RIDING

Alpine skiing and snowboarding **occurs** on mountainous terrain with long downhill runs. Most alpine skiing and riding **occurs** at developed ski areas and resorts, including adaptive skiing and riding.

DOWNHILL SKIING & RIDING OVERVIEW

OPPORTUNITIES

There are seven lift-served ski areas in WNY, including six that are open to the general public and one member-only resort (HoliMont Ski Area). Ski areas are primarily located in southeastern areas of WNY on the Northern Allegheny Plateau, where the combination of lake effect snow and mountainous terrain supports ski area operations.

EXPERIENCES

- Skiing deep powder from lake effect storms.
- Groomed, packed powder runs using manmade snow.
- Family- and beginner-friendly terrain.
- Night skiing under the lights.
- Ski racing events.

PARTICIPATION

NATIONAL TRENDS

Nationally, there has been an increase in skier visits to ski areas in recent years. The 2021/2022 and 2022/2023 ski **season** were the two busiest **seasons** on record, with a record 65.4 million skier visits in the latter season. Overall, skier visits in the Northeast have remained steady for decades, with annual fluctuations largely driven by weather and climate factors.

PRIVATE SECTOR PROVIDERS

All seven ski areas in WNY are privately operated. Skiing experiences in WNY are supported by a number of private sector businesses that offer equipment rentals and servicing.

TOURISM ROLE

PRIMARY ATTRACTIONS

Ski areas in WNY are relatively small and low-elevation compared to the Northeast's major ski destinations; however, there are compelling factors that can support visitors choosing WNY ski areas over other regions:

- **Beginner- and family-friendly skiing:** while WNY ski areas offer terrain for every skill level, the combination of ample mellow trails and relatively low prices is ideal for families and less experienced visitors.
- **Lake effect snow:** major lake effect snow events have the ability to deliver sought-after snow conditions to WNY ski areas.



Holiday Valley Ski Resort is WNY's largest ski area, with 60 trails, 13 lifts, tubing, a mountain coaster, and three lodges. Ski Magazine ranked Holiday Valley as the 11th best overall resort in the Northeast for its 2025 rankings, noting that the resort was ranked first overall in the magazine's reader survey for best "Quick Trip" in the region.

Source: ILoveNY

OUTDOOR RECREATION ASSETS: TRADITIONAL & OTHER

HUNTING

Hunting takes place in areas across WNY and comes in many forms. Hunters target a variety of small and large game, from rabbit to deer, as well as grouse, turkey, waterfowl, and other bird species.

HUNTING OVERVIEW

OPPORTUNITIES

Opportunities for hunting are found all over WNY. Southern areas on the Northern Allegheny Plateau typically see the highest deer harvest numbers. Spring turkey harvests are highest in northern areas on the Great Lakes Plain, while fall turkey harvests are evenly spread out across the region.

EXPERIENCES

NYSDEC manages State Forests, Multi-Use Areas, Unique Areas, and Wildlife Management Areas in WNY for hunting, primarily in the southern Northern Allegheny Plateau. Several State Parks, including Allegany, Darien Lakes, Letchworth, and Silver Lake, also permit hunting. Iroquois and Montezuma National Wildlife Refuges offer waterfowl and deer hunting, and numerous private hunting clubs provide access to private lands.

PARTICIPATION

REGIONAL PARTICIPATION

WNY is a popular region for hunting. There were 58,884 deer harvested in WNY in 2023, accounting for 28% of all deer harvested in New York State. This was equivalent to 3.7 deer per square mile, compared to 2.6 deer per square mile statewide. Turkey hunting was even more productive in WNY, with 1.2 turkeys harvested per square mile from 2017 to 2023 compared to 0.6 turkeys per square mile statewide.

NATIONAL TRENDS

According to the *2022 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation*, approximately 6% of U.S. residents participate in hunting (*U.S. Fish & Wildlife Service, 2023*). This represented a 26% increase in participation compared to the prior survey in 2016.

PRIVATE SECTOR PROVIDERS

There are at least 65 licensed hunting guides based in WNY, as well as dozens of private hunting clubs.

TOURISM ROLE

WNY is a draw for hunters, evidenced by productive game harvest numbers and a strong cohort of private businesses. WNY's many public lands are key attractions for hunting, as are private hunting clubs. In WNY, Allegany, Darien Lakes, Letchworth, and Silver Lake State Parks each permit some form of hunting.



Deer Hunting in Western New York.

Source: ILoveNY

OUTDOOR RECREATION ASSETS: TRADITIONAL & OTHER

ADDITIONAL OUTDOOR RECREATION ACTIVITIES

DEVELOPED RECREATION

Some of WNY's ski areas offer developed multi-season recreation opportunities, including the **Sky High Adventure Park** at Holiday Valley and the **Mountain Adventure Park** at Peek'n **Peak** with both areas offering ziplining. Holiday Valley's aerial park is the third-largest in the U.S. There are several other aerial park and zipline operators in the region as well.

BIRDWATCHING & WILDLIFE VIEWING

WNY is home to several notable birdwatching destinations. The **Niagara River** corridor, recognized as a **globally-significant** Important Bird Area (IBA), hosts the annual Birds on the Niagara event and is home to species like bald eagles and peregrine falcons. The **Niagara Gorge Trail System** provides many overlooks for birding. **Allegany State Park**, also an IBA, features a Bird Conservation Area for migratory birds. The park's annual Allegany Nature Pilgrimage provides a checklist of 153 bird species that can be spotted by attendees.

HORSEBACK RIDING

There are notable opportunities for horseback riding in WNY. The **Chautauqua County Equestrian Trail System** includes five trailer parking areas and significant networks of well-maintained trails in Boutwell and North Harmony State Forests. **Genesee Valley Greenway State Park** is another equestrian-friendly trail; there are several **privately-operated** stables with equestrian trails in the region as well.

NORDIC SKIING

There are several groomed Nordic skiing trail networks in WNY, including **Byrnecliff Golf Resort** and **Holiday Valley Resort**. The Art Roscoe Cross Country Ski Area at **Allegany State Park** is WNY's largest Nordic ski trail network, with 18 miles of groomed trails and 25 miles of ungroomed backcountry trails.

DISC GOLF

Western New York offers a variety of disc golf courses, catering to players of all skill levels. Popular courses include the 27-hole course at **Joseph Davis State Park**, **Wilson-Tuscarora State Park**, and **Genesee Valley Park** in **Rochester** among many others. The region also hosts regular tournaments and has a growing disc golf community, including organized leagues through the Western New York Disc Golf Club.



Sky High Adventure Park at Holiday Valley Resort, Ellicottville, NY.

Source: *ILoveNY*



AGRITOURISM

WNY has an authentic and diverse agricultural heritage, thanks to fertile soils and the temperate effects of the Great Lakes. Agritourism celebrates and helps to sustain WNY's agricultural operators by inviting visitors onto farms for a recreational, educational, and/or culinary experience.

AGRITOURISM OVERVIEW

OPPORTUNITIES

Agriculture is widespread in WNY, offering diverse agritourism opportunities shaped by ecological regions. U-pick farms and farmers' markets are concentrated near Buffalo and Rochester, benefiting from large consumer markets and favorable growing conditions. Vineyards and wineries line the Great Lakes shores, while dairy farms, maple syrup producers, and village markets support agritourism elsewhere. WNY has New York's highest concentration of maple syrup producers.

EXPERIENCES

- Touring vineyards and wineries.
- Visiting "U-pick" farms.
- Sampling local maple syrup.
- Farm-to-table dining.
- Apple picking at local orchards.

PARTICIPATION

STATEWIDE & NATIONAL TRENDS

In 2022, the total value of agritourism and on-farm recreational receipts in New York State was \$55 million, representing a 25% increase since 2017 (*USDA National Agricultural Statistics Service, 2022*). This was slightly below the nationwide increase of 33% during this time.

TOURISM ROLE

PRIMARY ATTRACTIONS

WNY offers unique and compelling agritourism attractions, particularly as part of coordinated regional itineraries:

- **Niagara Wine Trail:** eleven wineries and vineyards comprise this 60-mile itinerary trail, spanning Niagara, Orleans, and Monroe Counties. Regular events and group tours help activate itineraries for visitors.
- **Lake Erie Wine County:** spanning New York State and Ohio, this itinerary trail connects 21 wineries along 50 miles of Lake Erie shoreline. Regular events and group tours help activate itineraries for visitors.

EVENTS

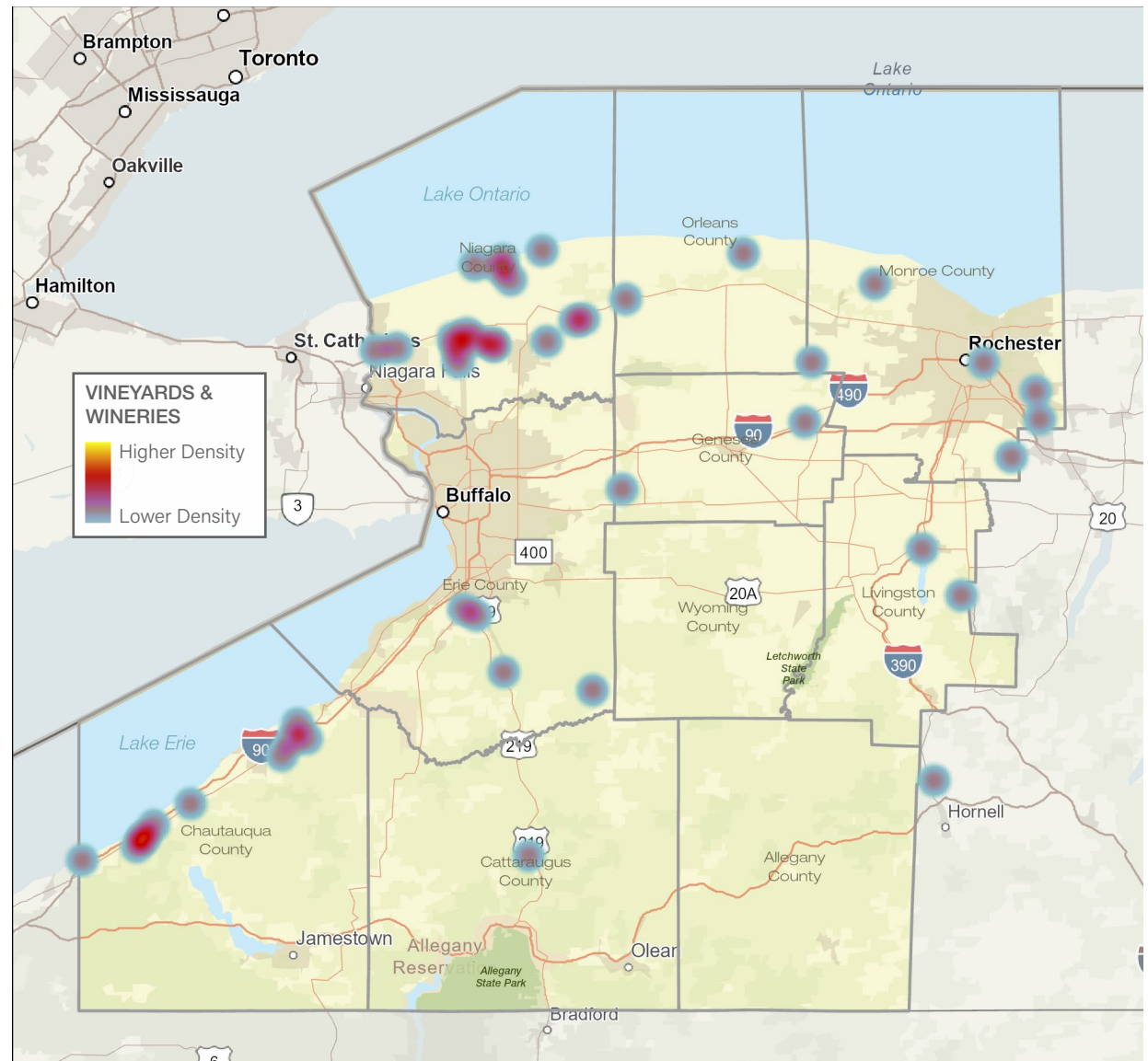
There are a number of agritourism events that are a draw for visitors in WNY, including the annual WNY Maple Festival in Franklinville (now in its 60th year), Wyoming County Maple Weekends, the Buffalo Wine Festival, the Niagara Grape & Wine Festival, America's Grape County Craft Beverage Festival, and the Erie County Fair.



The **Wyoming County Barn Quilt Trail** is a novel approach to regional agritourism itinerary development that blends agriculture and public art.

Source: Wyoming County Tourism

CULTURAL TOURISM ASSETS



Heat map of vineyard and wineries in WNY.

Data Note: these heat maps represent individual or clusters of businesses. Maps display geo-located, web-based data sources identifying businesses as of spring 2024 and may not represent all businesses in the region.

THE ARTS

ARTS OVERVIEW

WNY is home to rich arts scene spanning performing arts, public art, museums, and galleries. Major urban centers are home to performing arts venues ranging from large arenas hosting major artists to local groups on neighborhood stages. Performing arts venues dot WNY's more rural areas, including outdoor stages and amphitheaters.

WNY's large cities similarly host a variety of art galleries and museums. There has been an increased emphasis on fostering the arts in WNY's more rural areas as well, including coordinated mural programs and public art installations.

OPPORTUNITIES

EXPERIENCES

- Gazing at the works of world-famous artists.
- Seeing major artists, orchestras, and touring shows at performing arts venues.
- Experiencing arts institutions, such as the National Comedy Center.
- Attending **culturally-enriching** performances at historic venues.

PARTICIPATION

According to the *Arts and Economic Prosperity 6* report, 53% of U.S. residents consider a potential destination's arts and cultural experiences when deciding where to visit (*Americans for the Arts, 2024*). On average nationally, 30% of attendees at performing arts events travel from outside of the county where the event is located.

TOURISM ROLE

PERFORMING ARTS

There are a variety of performing arts experiences that can serve as primary attractions for visitors to WNY, including:

- **Major Venues:** WNY is home to large arenas, stadiums, and outdoor venues that can host major performing artists. KeyBank Center, Highmark Stadium, and Blue Cross Arena can each hold tens of thousands of attendees. Kleinhan's Music Hall and Shea's Performing Arts Center are renowned performance venues in Buffalo. Outdoor venues like ArtPark, Terminal B, and Darien Lake Performing Arts Center also host performances from major artists.
- **Novel Entities:** WNY has a number of unique and distinctive performing arts attractions. The National Comedy Center in Jamestown offers a blend of educational and interactive exhibits and events in addition to operating the nearby Lucille Ball Desi Arnaz Museum. The Center was named Best New Museum in the US by



ArtPark Mainstage.

Source: Artpark.net

CULTURAL TOURISM ASSETS

USA Today in 2024 and was named to Time Magazine's *"World's Greatest Places of 2019"* list. To the north, Buffalo's Colored Musicians Club and Jazz Museum is the only continuously running, all-Black-owned music venue in the United States.

- **Major Events:** WNY is home to a number of performing arts events that are a draw for visitors, including the Rochester Jazz Festival, Borderland Music + Arts Festival, East Aurora Music Festival, Lucille Ball Comedy Festival, Rochester Summer Soul Music Festival, Holiday Valley Summer Music Festival, Great Blue Heron Music Festival, and the Seneca Nation Summer Outdoor Concert Series.
- **Charming Rural Venues:** outside of WNY's larger cities, smaller venues support the arts in the region's villages and Main Streets, including the Fredonia Opera House, Lake Shore Center for the Arts, Reg Lenna Center for the Arts, Gowanda's Historic Hollywood Theater, and West Falls Center for the Arts.

ART DISTRICTS

There are a number of art-focused neighborhoods and commercial districts in WNY, offering a cluster of cultural experiences including performance venues, galleries, and eateries. Notable examples include Buffalo's Theatre District, Rochester's Neighborhood of the Arts and ARTWALK, and Jamestown's ArtScape initiative.

VISUAL ARTS

There are a variety of visual arts experiences that can serve as primary attractions for visitors to WNY, including:

- **World-Famous Artists on Display:** the works of renowned artists such as Vincent Van Gogh, Pablo Picasso, Claude Monet, and Andy Warhol are on display **the** AKG Art Museum in Buffalo, one of Time's "World's Greatest Places 2024," and the Memorial Art **Galley** in Rochester.
- **Art Festivals:** WNY hosts a number of annual art festivals across the region, including the Allentown Art Festival, Orchard Park Festival of the Arts, Glen Park Art Festival, Brockport Arts Festival, Lewiston Art Festival, Corn Hill Arts Festival, and Chautauqua Institution's Art in the Park.
- **Regional Art History:** the Seneca Iroquois National Museum features a variety of mixed media across multiple art exhibits. In Buffalo, the Burchfield Penney Art Center features the works of American master Charles E. Burchfield and over 800 other WNY artists. In Gloversville, the Karpeles Manuscript Library Museum contains more than a million historical documents with a rotating collection.
- **Art Trails:** there are multiple established art trails in WNY that highlight regional art scenes, including the ASI Public Art Trail, Chautauqua-Lake Erie Art Trail, Livingston County Inspirations Trail, and Niagara County By The Numbers Mural Trail.



Griffis Sculpture Park, East Otto, NY.

Source: ILoveNY

CULTURAL TOURISM ASSETS

CULINARY TOURISM

CULINARY TOURISM OVERVIEW

OPPORTUNITIES

Culinary offerings in WNY vary from classic rural “mom and pop” restaurants to high-end, haute cuisine. WNY has unique and compelling culinary destinations and regional cuisines that can be the primary driver for a visit to the region or support a well-rounded tourism experience for others. Eateries are primarily clustered in WNY’s larger cities and towns; however, the region’s small villages and Main Streets are also home to small restaurants and cafes that contribute to an authentic sense of places for these communities.

EXPERIENCES

- Trying famous and novel local cuisines in their place of origin, such as Buffalo wings and Rochester’s “garbage plates”.
- Sampling locally brewed and distilled craft beers and spirits.
- Farm-to-table dining with local ingredients.
- Sampling diverse cuisines from around the globe.

PARTICIPATION

NATIONAL TRENDS

According to the American Express Travel 2023 *Global Travel Trends Report*, 81% of survey respondents prioritize exploring local foods and cuisines as part of their trip planning. Over one-third of travelers (37%) center their trip planning on visiting a specific food establishment.

TOURISM ROLE

FOOD TRAILS

WNY food trails provide itineraries and decision-making guidance for visitors who want to sample the region’s culinary offerings

- **The Buffalo Wing Trail:** one of many food trails established by Visit Buffalo Niagara.
- **WNY Beer Trail:** covering areas west of Rochester, this trail spotlights 71 breweries and distilleries across WNY. The WNY Beer Trail Pass entitles passholders to buy-one, get-one beverages at participating establishments.
- **Upstate Eats Trail:** this statewide trail highlights the premier food establishments in Buffalo, Rochester, Syracuse, and Binghamton.

CULINARY EVENTS & EXPERIENCES

Culinary events in WNY are a draw for visitors, including:

- **Food Festivals:** Taste of Buffalo is one the largest food festivals in the U.S, attracting over 400,000 visitors annually. There are many other annual food festivals across WNY, including the National Buffalo Chicken Wing Festival, Niagara County Peach Festival, Busti Apple festival, and Rochester’s International Food Festival.



The West Side Bazaar allows entrepreneurs from around the world, including immigrants, refugees, and local handcrafters a space to sell and display their products to customers. Their mission is to see all residents of Western New York thrive in a cultural inclusive community by removing the systemic barriers to economic equity. The space has gained international recognition for its success, including a visit from the United Nations.

CULTURAL TOURISM ASSETS

HISTORY & HERITAGE

HISTORY & HERITAGE OVERVIEW

OPPORTUNITIES

WNY has a rich and complex history, with many organizations dedicated to preserving and sharing its heritage. This history includes key events and struggles in American history, such as the Seneca Nation of Indians, the Underground Railroad, and the Erie Canal's development. Some aspects are preserved through artifacts, stories, and institutions, while others remain visible in conserved buildings, infrastructure, and enduring cultural practices.

EXPERIENCES

- Observing the region's famous architecture, hosted in historic downtowns, Main Streets, and former estates.
- Experiencing cultural heritage sites tied to major events in American history.
- Traveling along historical corridors, such as the Erie Canal.
- Engaging with cultural landscapes and institutions that have persisted to the modern day.

PARTICIPATION

According to the United Nations World Tourism Organization, heritage tourism accounts for about 40% of all tourism worldwide.

TOURISM ROLE

REGIONAL HISTORY

There are a variety of institutions dedicated to WNY's history that can serve as compelling attractions for visitors to WNY, including:

- **Underground Railroad:** the Niagara Falls Underground Railroad Heritage Center offers exhibits and tours and is included on the National Park Service's Travel with Tubman itinerary trail.
- **Erie Canalway National Heritage Corridor:** this Congressionally-designated historic corridor includes six museums and historic sites, including the Erie Canal Discovery Center in Lockport and the Rochester Museum & Science Center.
- **Frank Lloyd Wright Architecture:** In addition to half a dozen additional Wright sites, two of Wright's most renowned estates (Martin House and Graycliff) are located in WNY and offer popular site tours.
- **Old Fort Niagara:** a historic military site dating back to the 17th century. It played a key role in the French and Indian War and the War of 1812. Today, it is a museum with well-preserved structures, interactive exhibits, and reenactments, offering visitors a chance to explore its history through living history demonstrations.



Lighthouse at Old Fort Niagara.

CULTURAL TOURISM ASSETS

CULTURAL HERITAGE EXPERIENCES

There are a variety of cultural heritage experiences that can serve as compelling attractions for visitors to WNY, including:

- **Seneca Nation of Indians:** the Seneca-Iroquois National Museum offers a rich mix of cultural and natural exhibits and guided experiences, providing an enriching cultural experience grounded in regional history.
- **Amish Trail:** spanning parts of Chautauqua and Cattaraugus Counties, the Amish Trail provides an opportunity to experience contemporary Amish ways of life and patronize Amish shops and makers.
- **Chautauqua Institution:** founded in 1874, the Chautauqua Institution was the home of the influential Chautauqua movement in the late 19th and early 20th centuries. Since then, Chautauqua Institution has expanded to include a variety of offerings spanning performing and visual arts, educational courses and lecture series, and outdoor recreation, attracting over 100,000 visitors per year.
- **Genesee Country Village & Museum:** New York State's largest living history museum offers a variety of exhibits, events, and workshops, centered around a 19th-century village created with 68 historical buildings from around the Genesee Valley.
- **Lily Dale Assembly:** this small hamlet, with a population of 275, sees over 20,000 visitors per year for events, classes, and demonstrations connected to the local history of the Spiritualist movement.
- **The Roycroft Inn:** this Inn, opened in 1905, served visitors to East Aurora who were interested in experiencing the burgeoning American Arts and Crafts Movement.
- **Knox Farm State Park:** the former country estate of a prominent Buffalo family, this park now provides enjoyment for public across managed pastures and woodlands and event spaces.



Courtyard Square Historic District, Albion, NY. Source: ILoveNY

CULTURAL ITINERARY TRAILS IN WNY

AGRITOURISM

LOCAL & REGIONAL TRAILS

- Barn Quilt Trail of Leroy
- Niagara Wine Trail
- Lake Erie Wine Country
- Wyoming County Barn Quilt Trail

STATEWIDE TRAILS

- NY Fiber Trail

THE ARTS

LOCAL & REGIONAL TRAILS

- ASI Public Art Trail
- Chautauqua-Lake Erie Art Trail
- Livingston County Inspirations Trail
- Niagara County By The Numbers Mural Trail



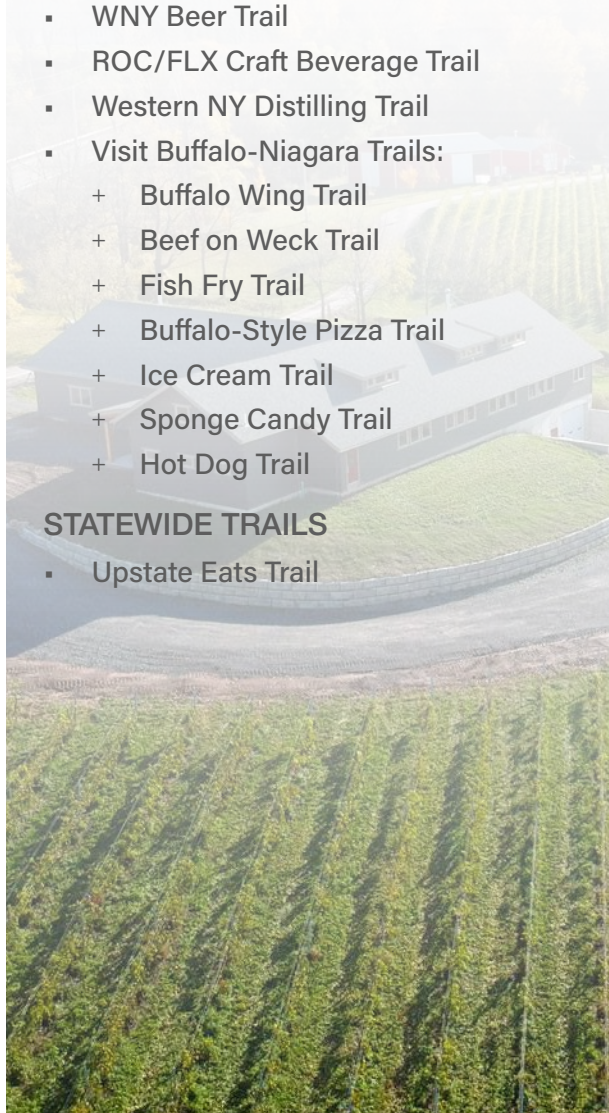
CULINARY

LOCAL & REGIONAL TRAILS

- WNY Beer Trail
- ROC/FLX Craft Beverage Trail
- Western NY Distilling Trail
- Visit Buffalo-Niagara Trails:
 - + Buffalo Wing Trail
 - + Beef on Weck Trail
 - + Fish Fry Trail
 - + Buffalo-Style Pizza Trail
 - + Ice Cream Trail
 - + Sponge Candy Trail
 - + Hot Dog Trail

STATEWIDE TRAILS

- Upstate Eats Trail



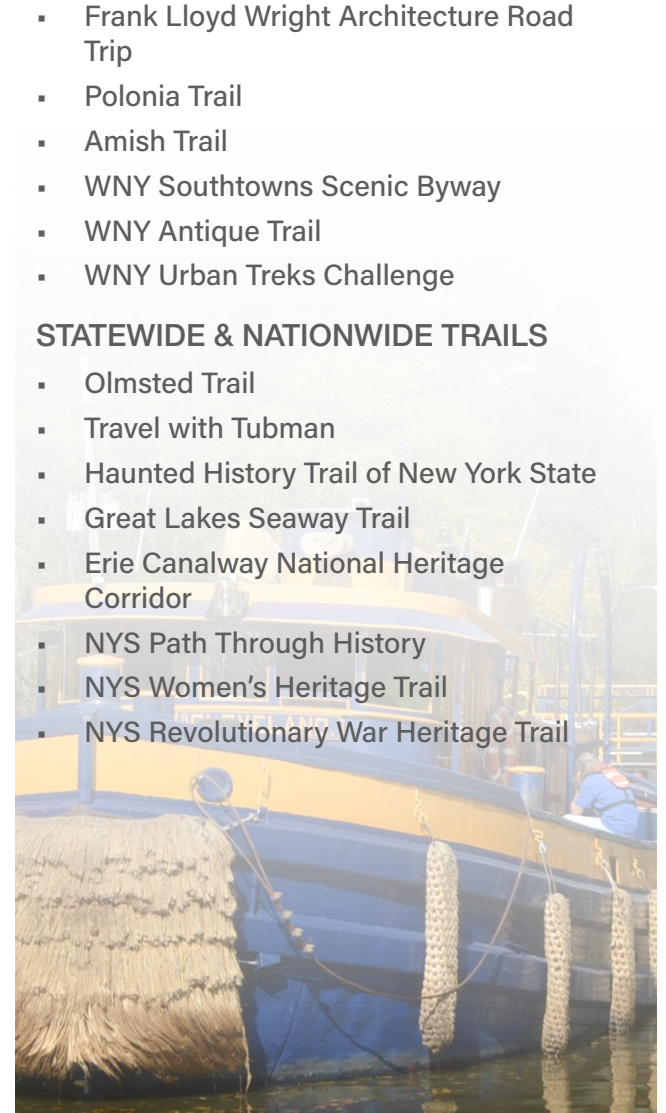
HISTORY & HERITAGE

LOCAL & REGIONAL TRAILS

- Frank Lloyd Wright Architecture Road Trip
- Polonia Trail
- Amish Trail
- WNY Southtowns Scenic Byway
- WNY Antique Trail
- WNY Urban Treks Challenge

STATEWIDE & NATIONWIDE TRAILS

- Olmsted Trail
- Travel with Tubman
- Haunted History Trail of New York State
- Great Lakes Seaway Trail
- Erie Canalway National Heritage Corridor
- NYS Path Through History
- NYS Women's Heritage Trail
- NYS Revolutionary War Heritage Trail



PROFESSIONAL & AMATEUR SPORTS

SPORTS OVERVIEW

WNY has three major-league professional sports teams and a number of minor league sports teams. Professional sports can be primary attractions for visits to WNY for sports fans as well as parts of a well-rounded tourism experience for other visitors.

MAJOR LEAGUE SPORTS TEAMS

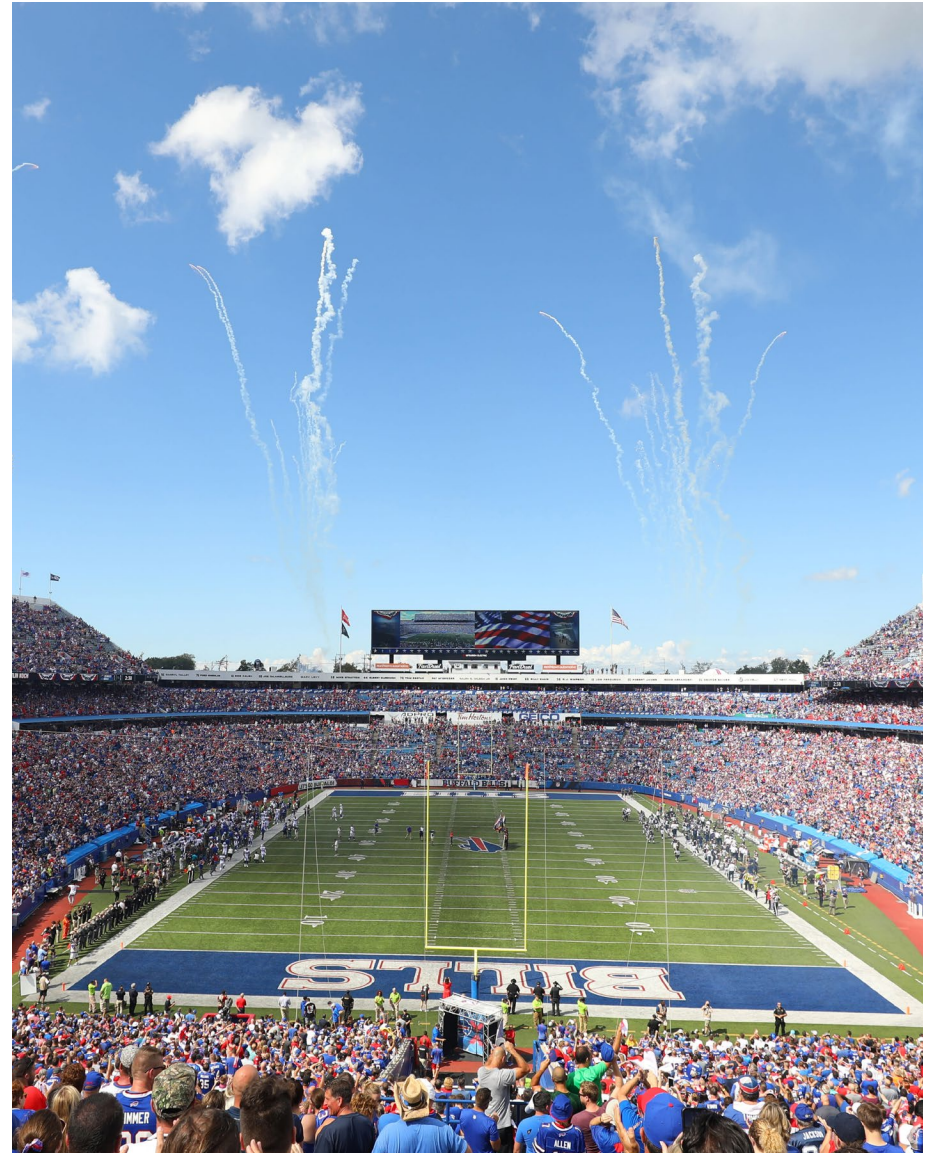
- Buffalo Bills (National Football League)
- Buffalo Sabres (National Hockey League)
- Buffalo Bandits & Rochester Knighthawks (National Lacrosse League)

MINOR LEAGUE SPORTS TEAMS

- Buffalo Bisons & Rochester Red Wings (Triple-A International League - baseball)
- Buffalo eXtreme & Rochester Royal Ballers (American Basketball Association)
- Rochester Royal Ballers (Women's American Basketball Association)
- Rochester Americans (American Hockey League)
- FC Buffalo (United Soccer League Two)
- FC Buffalo Women (United Women's Soccer)
- Rochester Lancers (Major Arena Soccer League 2)
- Batavia Muckdogs & Jamestown Tarp Skunks (Perfect Game Collegiate Baseball League)

OTHER SPORTS ATTRACTIONS

- Bare Knuckle Boxing Hall of Fame - Belfast, NY
- Greater Buffalo Sports Hall of Fame - Buffalo, NY



Highmark Stadium.

Source: *ILoveNY*

EXPLORING REGIONAL BRAND IDENTITY



INTRODUCTION

At a basic level, a region's tourism brand identity can be thought of as visual and written content that speaks to the region's characteristics and the compelling attractions and experiences that it offers. This media can then support coordinated branding and marketing efforts aimed at boosting the profile of the region amongst potential visitors.

Through a deeper dive, regions can use the process of examining brand identity to foster alignment between regional tourism promotion and investment and individual community identity. Collaborative approaches that prioritize maintaining local authenticity by speaking to the identity and values of the communities that sustain tourism experiences ultimately lead to stronger long-term outcomes. This chapter presents elements that contribute to WNY's brand identity and narrative, with a focus on local and regional authenticity.

REGIONAL BRAND NARRATIVES FOR WNY: THE OPPORTUNITY

WNY is a region of immense tourism potential, boasting a unique blend of natural wonders, rich cultural heritage, and thriving communities. Ecological landscapes, shared cultural heritage, and novel attractions speak to the shared strengths of tourism around the region.

However, WNY also faces unique challenges that have historically shaped perceptions and influenced tourism patterns. The region's reputation for cold, snowy winters and

sometimes challenging driving conditions during those months can deter visitors seeking year-round destinations. The "Rust Belt" moniker is another perception challenge, particularly for the region's large cities.

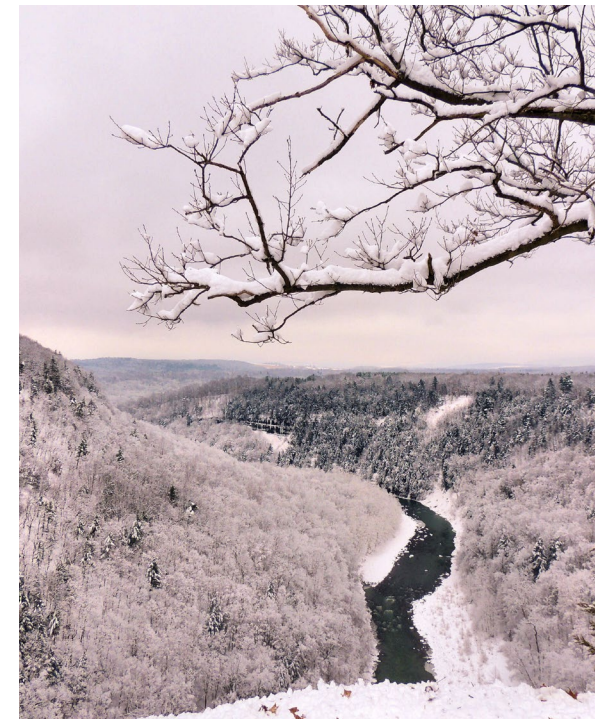
Collaboratively embracing and addressing these challenges head-on is key to fostering a resilient and adaptable brand narrative. By showcasing the beauty and unique experiences that different communities and seasons offer, there is an opportunity to transform perceived obstacles into captivating attractions. The examination of brand identity factors and narratives in this chapter is a foundational step to reframe the narrative around WNY.

By evaluating common brand identity factors and narratives that **celebrates** shared assets and **respects** local priorities and differences, the tourism partners can create a stronger, more cohesive message that resonates with a wider audience. This unification concept provides a powerful framework for this approach:

- **Shared Identity:** The regional brand is a shared experience that transcends county lines, creating a sense of unity and common purpose. It is a tangible force that shapes the region's weather, landscape, and culture, and it provides a unique selling proposition that sets WNY apart from other destinations.
- **Emotional Connection:** The regional brand should evoke a sense of wonder, awe, and adventure. It is a visual and visceral phenomenon that creates dramatic skies, breathtaking sunsets, and abundant

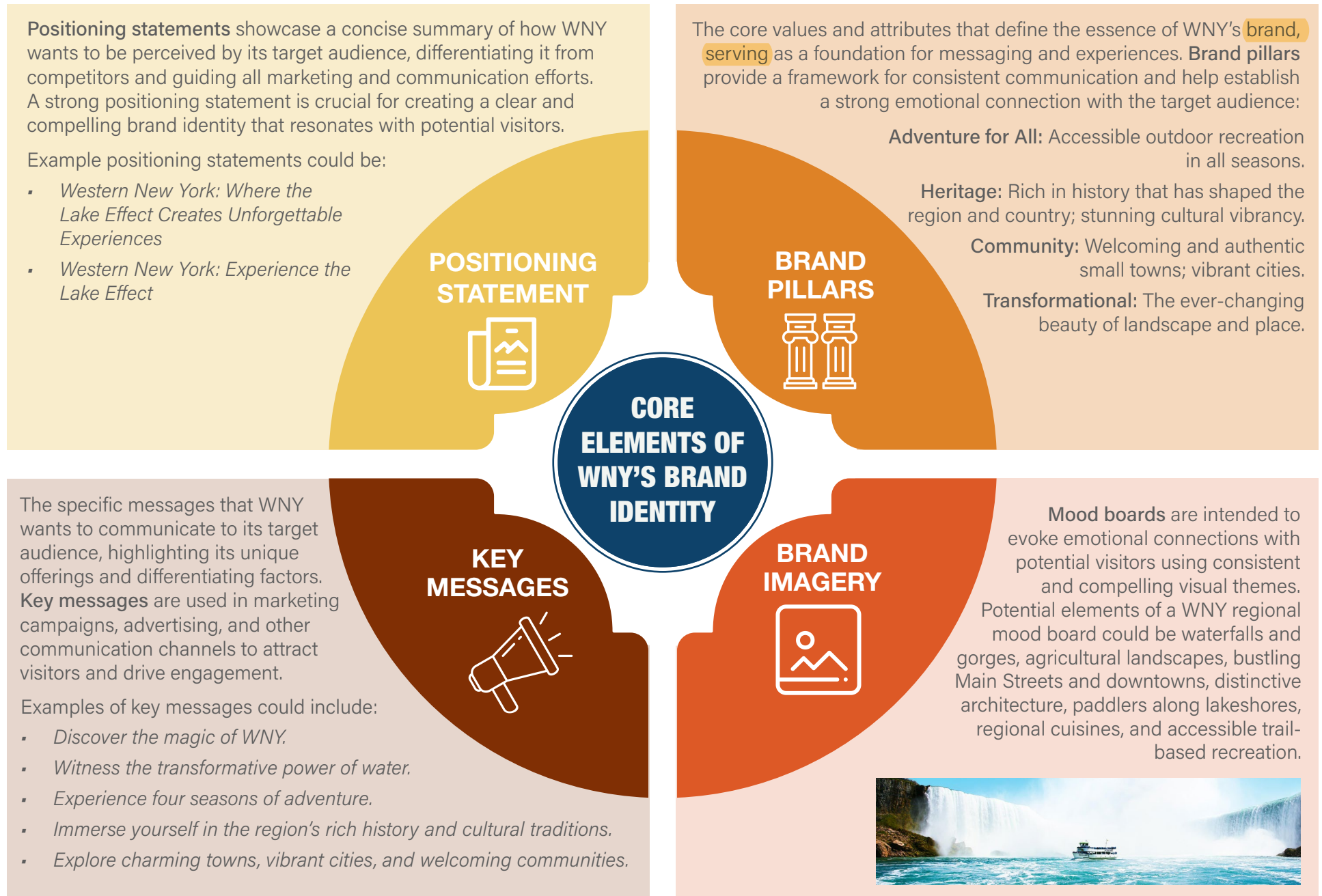
snowfall. By tapping into this emotional connection, we can create a brand identity that resonates with visitors on a deeper level.

- **Versatile Narrative:** The regional brand can be used to tell a variety of stories about WNY, highlighting its diverse attractions, activities, and communities. It can be used to promote outdoor adventure, cultural exploration, or simply the joy of experiencing the region's natural beauty.



Winter at Letchworth State Park.

EXPLORING REGIONAL BRAND IDENTITY



REGIONAL BRAND PILLARS FOR WESTERN NEW YORK

ADVENTURE FOR ALL

Accessible outdoor recreation in all seasons.



HERITAGE

Rich in history that has shaped the region and country; stunning cultural vibrancy.



COMMUNITY

Welcoming and authentic small towns; vibrant cities.



TRANSFORMATIONAL

Ever-changing beauty of landscape and place.



EXPLORING REGIONAL BRAND IDENTITY



Buffalo Main Lighthouse, Buffalo, NY.

Source: ILoveNY



Breakwall at Sunset Bay, Irving, NY.

Source: ILoveNY

WATER RESOURCES: A BRAND IDENTITY THROUGHLINE

WNY's geography, communities, history, and culture are indelibly influenced by water. Each region within WNY has its own relationship to water:

- Lakeshore towns and cities along Lakes Erie and Ontario
- Communities connected and shaped by the Erie Canal and major watercourses, like the Genesee River
- Stunning natural features shaped by water, from well-known landmarks like Niagara Falls and Letchworth Gorge (the "Grand Canyon of the East") to **locally-cherished** waterfalls, lakes, and fishing holes in the Cattaraugus Highlands.

In many ways, WNY's story of water is already well-known. Even the region's infamous winter weather – driven by cold air moving across the ice-free Great Lakes – is known to many by the familiar "lake effect" moniker. By weaving the narrative of water into the fabric of WNY's brand, the region can tap into a familiar and powerful source of inspiration and attraction for recreational and cultural experiences alike. Putting forth a readily recognizable brand based on water can be the region's foot in the door in the minds of the traveling public, offering the region's tourism partners the opportunity to promote the compelling experiences and amenities in their respective jurisdictions.

EXPLORING REGIONAL BRAND IDENTITY

HUBS & SPOKES

MARKETING & EXPERIENCE ACTIVATION

WNY features well-established hubs for commerce, culture, and tourism. There is an opportunity to establish additional primary tourism hubs in the region, as well as secondary hubs and spokes connecting smaller towns, villages, and attractions through themed trails, itineraries, marketing campaigns, and even transportation services.

WNY's tourism landscape is rich with diverse attractions. Effectively leveraging these assets to maximize economic impact requires strategic planning. The hub-and-spoke model offers a powerful solution by positioning major attractions as central "hubs," and connecting them to surrounding, smaller destinations or "spokes." This allows visitors to experience a variety of attractions within a concentrated region, encouraging longer stays and greater spending.

By promoting diverse experiences within each spoke, such as outdoor adventure, historical exploration, or cultural immersion, a wider range of interests and demographics is reached. Furthermore, strategic partnerships between businesses and organizations in different locations can create package deals and incentives, driving visitors to explore multiple destinations and spreading tourism dollars more widely. This not only enhances the visitor experience but also amplifies the economic benefits for a greater number of communities in Western New York.

REGIONAL EXAMPLES

Local and regional partners are already using hub-and-spoke approaches for enhanced tourism and economic development in WNY as part of a regional tourism promotion efforts. These approaches that can serve as models for other regional hubs throughout WNY:

- **Erie Canal:** Positioned as a central hub, the Erie Canal's historical significance and water-based activities, such as boating, kayaking, and canalside dining and bicycle touring, can attract a diverse range of visitors. Initiatives like the Empire State Trail Towns Program are enhancing this hub-and-spoke approach in local communities

- **Letchworth State Park:** With its awe-inspiring waterfalls and the Genesee River flowing through its heart, Letchworth is a natural hub for outdoor adventure seekers. In addition to the park's existing activities like rafting and kayaking, spokes can highlight nearby hiking trails, fishing spots, and charming bed and breakfasts. Nearby communities are already capitalizing on this type of approach with the Letchworth Gateway Village Initiative, associated Explore Genesee Valley platform, and Genesee Valley Trail Towns program.

In both cases, this model not only expands the reach of the central attraction but also distributes tourism dollars to a wider array of businesses. By highlighting the interconnectedness of the region's assets, the hub-and-spoke model fosters a more sustainable and resilient tourism economy, benefiting both the major attractions and the surrounding communities.



Erie Canal in Pittsford.

REGIONAL POWER ASSETS:

AREAS OF MOMENTUM, GAPS, & OPPORTUNITIES



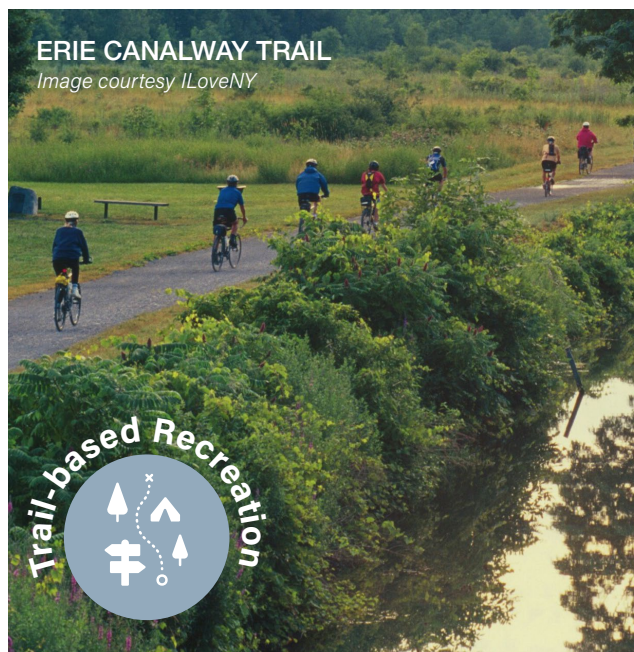
KEY ASSETS & EXPERIENCES IN A WELL-ROUNDED TOURISM REGION

WNY offers a tremendous variety of tourism assets and experiences spanning outdoor recreation, culture, history, big cities, and small towns. To support **mutually-beneficial** tourism planning, investment, and coordination across the region, it is important to understand how assets connect with **regional brand identity** and **communities** across WNY. Earlier in this report, we **discuss** the ecological regions and built environments that comprise WNY – important understandings for regional tourism planning. In this chapter, we present WNY's **power assets** – key areas of regional strength and momentum, rooted in communities and landscapes, with the ability to grow and sustain the scale and impact of tourism in WNY.

These power assets, identified through research and stakeholder consultation, are:

- *Trail-Based Recreation*
- *Water-Based Recreation*
- *Cultural Tourism*

Through examination of WNY's power assets, tourism partners can better understand areas of region-wide momentum, strategic alignment, gaps, and opportunities where future regional coordination and investment can make the greatest impact.



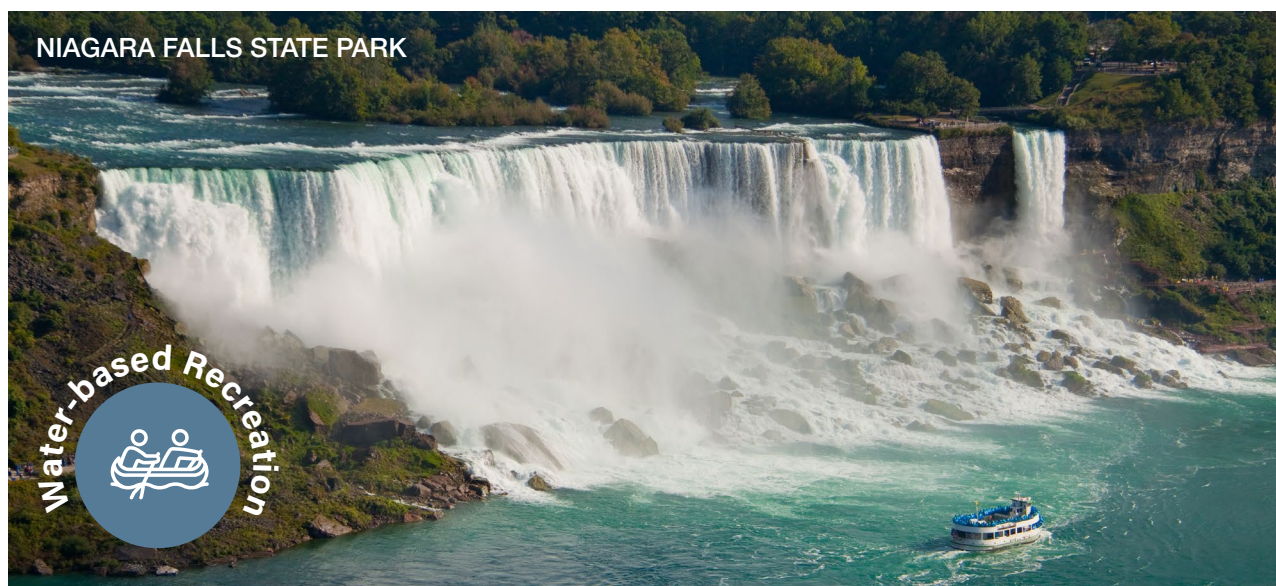
ERIE CANALWAY TRAIL

Image courtesy ILoveNY



LUCILLE BALL DESI
ARNAZ MUSEUM

Image courtesy ILoveNY



NIAGARA FALLS STATE PARK

2022: A WATERSHED YEAR FOR TRAIL INVESTMENT IN WNY



Source: Artpark.net

In April 2022, Governor Kathy Hochul announced a \$22.8 million investment in WNY trails, supported by grants from the Ralph C. Wilson, Jr. Foundation and funds from the New York Power Authority and the Office of Parks, Recreation, and Historic Preservation. Funding for these projects is supporting the development of trail connections between Lewiston and Artpark State Park, a 3.6-mile extension of the Quaker Area Multi-Use Trail in Allegany State Park, and the construction of four new bridges along the Genesee Valley Greenway that will open up new trail connections and take the trail off of busy NY Route 19.

TRAIL-BASED RECREATION

WNY offers a compelling mix of landscapes and destinations spanning natural areas and the built environment to support trail-based recreation, as well as suitable terrain for a variety of trail types. Trails in WNY provide connections to stunning natural features, peaceful forests, rural pastoral landscapes, rich regional histories, cultural amenities, and village and urban centers. The region's variety of trail types and systems support opportunities for family and beginner-friendly outings, thrill seeking, multi-day excursions, community events, and social bonding.

There has been significant investment in trail-based recreation in WNY across government, philanthropic, and volunteer-based organizations, spurred by a shared understanding of the community and economic development potential of trails. There is active work throughout the region to develop new trail connections and experiences and to improve **accessibility** and quality of existing trails, supported by multi-million-dollar investments from state and philanthropic partners. At the local level, community partners are working on activating nearby trail connections to benefit their Main Streets and downtowns.

AREAS OF REGIONAL MOMENTUM & STRATEGIC ALIGNMENT

REGIONAL TRAIL DEVELOPMENT

The development of regional trail connections is an area of significant ongoing regional planning, coordination, and investment. Regional trail development holds great potential for supporting tourism, creating opportunities for new connections and accessible recreation experiences in different ecological regions, natural areas, and population centers.

Key recent, planned, and ongoing regional trail development initiatives include:

- **Southern Tier Trail:** The Southern Tier Trail is an envisioned 80-mile trail that would connect Buffalo to Hinsdale along the Buffalo-Pittsburgh rail corridor. In doing so, the trail would complete a near-continuous regional loop trail consisting of the Genesee Valley Greenway and the Empire State Trail / Erie Canalway Trail, opening up new tourism opportunities in the mountains of the Northern Allegheny Plateau and unlocking extended bicycle tours around all of WNY. A 2021 feasibility study identified 23 sections of trail to be constructed, including nine high-priority sections that connect into existing trails and population centers. Trail development efforts have continued since the completion of the feasibility study, including detailed engineering studies to support trail construction.

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

REGIONAL TRAIL DEVELOPMENT (CONTINUED)

- **The Shoreline Trail / Niagara Gorge Trail System.** In 2021, as part of a long-planned project to reestablish recreational access along the Niagara Gorge, a two-mile portion of the underutilized Niagara Scenic Parkway was converted into a new area of Niagara Falls State Park, now called Gorgeview. The project included establishment of a connecting series of recreational trails, in addition to new picnic areas and scenic overlook. This project is one in a planned series of projects to better connect existing State Park facilities along the Niagara Gorge between Niagara Falls and Lewiston using recreational paths. The combination of new park and trail facilities and interim highway lane closures has provided a near-continuous, traffic-free connection; plans for permanent improvements to complete this park and trail corridor are under development. This trail development is complemented by a significant investment to improve trail connections into Lewiston, including connections to Artpark State Park. Once completed, these trail connections will form a critical link in the Shoreline Trail running the full length of the Niagara River and connecting into the Empire State Trail in Buffalo.
- **Genesee Valley Greenway State Park.** The \$6.25 million Genesee Valley Greenway Bridges of Allegheny County project will result in the creation of four new bridges along the Genesee Valley Greenway. The

construction of these bridges will open up new trail connections in sections where it currently follows NY Route 19, creating a vastly improved trail experience.

- **Genesee Riverway Trail.** This 22-mile multi-use trail connects Lake Ontario to the Empire State Trail and Genesee Valley Greenway State Park through downtown Rochester. As part of the ROC the Riverway initiative, there are a number of proposed enhancements to the trail, including providing a seamless connection through downtown Rochester on both sides of the Genesee River.
- **U.S. Great Lakes Waterfront Trail.** The U.S. Great Lakes Waterfront Trail is envisioned as a project that links new and existing trails along the waterfronts of the Great Lakes across eight U.S. states, including Lake Erie and Lake Ontario. The trail system would be a complement to Canada's Great Lakes Waterfront Trail, a 2,250-mile network of roads and trails along Canada's Great Lakes. Implementation of this long-term vision would support a variety of compelling tourism experiences, from day trips to long-distance bicycle tours. Work is underway by a collaborative of governments and partners with support from the National Park Service Rivers, Trails, and Conservation Assistance program to examine this concept further, including identification of existing and potential trail connections.

MOUNTAIN BIKING TRAILS

There is a growing and improving network of mountain biking trails in WNY, particularly in areas in Cattaraugus and Chautauqua Counties using the suitable terrain of the Northern Allegheny Plateau.

Ongoing work to improve mountain biking opportunities in WNY includes the following initiatives:

- **HoliMont Bike Park** in Ellicottville has continued to expand the mileage and variety of lift-served downhill mountain biking trails, growing from eight trails to 19 trails in recent years.
- Partners in **Chautauqua County** have continued to invest in mountain biking opportunities, including the ongoing multi-phase Chautauqua County Overland Trails Revitalization project.
- **Trails @ Loud** in Bemus Point is a relatively new and recently expanded network located directly behind the Loud Performance bike shop.



Genesee Valley Greenway State Park.

Source: ILoveNY

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

TRAIL ACCESSIBILITY & QUALITY

There is ongoing work in WNY to improve accessibility to trail-based recreation and ensure that trails are maintained to a high standard of quality. Providing well-maintained, beginner-friendly **and** accessible trails opens up trail-based recreation to more potential users with a range of abilities and experience.

Ongoing work to improve trail accessibility and maintenance in WNY includes the following initiatives:

- **Genesee Valley Greenway State Park:** over 17 miles of the Genesee Valley Greenway have been resurfaced with smooth compacted stone dust, replacing sections of rougher, grassy trail.
- **Letchworth State Park:** the Autism Nature Trail is a first-of-its-kind nature trail designed to accommodate trail users of all ages and ability levels with a specific focus on users who are on the autism spectrum. The one-mile, ADA-compliant loop trail includes eight stations offering different activities and sensory experiences. Additionally, two of three major waterfalls in Letchworth Gorge are accessible via wheelchair.
- **Allegany State Park:** the Quaker Area Multi-Use Trail is an ADA-compliant 5.2-mile paved multi-use trail connecting Quaker Lake to nearby camping areas, hiking trails, and park amenities in Allegany State Park. The first section of trail was opened in **2020** with project completion in 2023.
- **Ralph C. Wilson, Jr. Trails Maintenance Fund for Western New York:** this endowment, managed by the Community Foundation for Greater Buffalo, was started with a \$10 million grant from the Ralph C. Wilson, Jr. Foundation. The endowment will support an annual competitive grant program for maintenance of the Empire State Trail, Genesee Valley Greenway, the Shoreline Trail, and other trails.



Sensory Station at the Autism Nature Trail, Letchworth State Park.

Source: autismnaturetrail.com

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES



Empire State Trail Towns.

Source: Parks & Trails New York



Genesee Valley Trail Town Initiative.

Source: Parks & Trails New York

HARNESSING TRAILS FOR ECONOMIC DEVELOPMENT

In addition to the development, improvement, and maintenance of recreational trails, there has been ongoing work to activate trail connections and trail-friendly destinations in communities across WNY. The concept of “Trail Towns” has taken hold along the Empire State Trail and Genesee Valley Greenway and is catalyzing strategic planning and investment for future trail connections as well.

There are two active Trail Town programs in WNY, both supported by Parks & Trails New York (PTNY) in coordination with local and regional partners:

- **Empire State Trail Towns:** since the launch of the program in 2022, PTNY has worked with the City of Lockport and the Town of Brockport to activate trail-friendly destinations and improve connections to the Empire State Trail in these communities. Key opportunities that were identified in these communities included improved wayfinding signage, expanding free or low-cost overnight accommodations for trail users, promoting trail-friendly business practices amongst local merchants, and providing improved bicycled and pedestrian connections into downtown areas. In 2024, PTNY released the Empire State Trail Town **Handbook** which provides a toolkit for other communities along the trail to harness its economic potential.
- **Genesee Valley Trail Towns:** PTNY, in partnership with the Letchworth Gateway Initiative, Friends of the Genesee Valley Greenway, and Genesee Valley Greenway State Park, has also supported the Genesee Valley Trail Towns Initiative. In addition to technical **assistance** support and development of the Genesee Valley Trail Town Handbook, PTNY administers the Genesee Valley Trail Towns Grant program, with funding from the Ralph C. Wilson, Jr. Foundation. Since its launch in 2022, this grant program has provided funding for the development of wayfinding signage, bicycle parking, trailside picnic areas, trailhead improvements, marketing materials, and new connecting trails.

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

REGIONAL GAPS & OPPORTUNITIES

There is significant momentum and alignment across WNY for developing and sustaining compelling trail-based recreation experiences. Opportunities to further enhance trail-based recreation in WNY include:

TRAIL SYSTEM CONNECTIVITY

Improving trail system connections at the local and regional level, particularly where regional trails use on-road connections, in places where trail connections unlock new compelling trail experiences, and where local trail systems or regional trails can be better connected to Main Streets and downtown areas. There has been significant work to establish these connections throughout WNY, particularly along the Empire State Trail and Genesee Valley Greenway, and many opportunities remain to improve connections along trails and between communities.

UNIVERSALLY-ACCESSIBLE AND ADAPTIVE EQUIPMENT-FRIENDLY TRAILS

There are a number of accessible trail experiences in WNY, primarily in State Parks, and there are opportunities to expand increase the number and types of recreational destinations that are universally accessible via trails.

In recent years, technological advances such as electric-assisted all-terrain wheelchairs and adaptive mountain bikes have opened up access to natural surface trails by users of different ability levels. There are trail organizations in WNY working to upgrade trails to adaptive equipment standards, which include wider treadways and bridges, larger turning radii, and limiting steep grades, and there remain many opportunities for upgrading existing trails and creating new adaptive equipment-friendly trails.

WAYFINDING

Wayfinding is a critical element of coordinated trail system planning, particularly when the goal is to connect trail experiences to Main Streets, businesses, and population centers. Wayfinding systems can include on-trail and on-road signage, trailhead kiosks, public art installations, and even training of frontline staff at key destinations and businesses.

Trail Town programs in WNY have focused strongly on wayfinding improvements, and there are opportunities to integrate wayfinding into trail system planning and economic development efforts in other communities around the region.

NOVEL TRAIL-BASED EXPERIENCES

The diversity of communities, natural features, and cultural experiences in WNY lends itself to the creation of novel trail-based experiences that are not easily replicable in other regions. Traveling along the Erie Canal, with its rich history, preserved canal infrastructure, scenery, and canal-side communities, is one such example. For other areas of WNY, tourism partners can explore how trails can integrate with and enhance cultural experiences, support multi-sport adventures (i.e., bike out, paddle back), promote access to the full spectrum of WNY's natural wonders (e.g., Hike WNY's WNY WaterFALL Challenge), unlock urban exploration, or be "gamified" through promoted itineraries and challenges.



Western New York Waterfall Challenge. Source: Outside Chronicles.



Buffalo Blueway Access Point.

Source: buffaloblueway.com

WATER-BASED RECREATION

WNY waterbodies are a stunning regional asset, both visually and physically. Waters tumble dramatically off plateaus and escarpments, carve dramatic river gorges, pass through downtowns, and settle into lakes and ponds of all sizes. The region's waters are home to renowned, world-class fisheries and are compelling destinations for boat touring, tranquil paddling, and whitewater adventures. Waterways have shaped the region's history, development, and culture, and are an indelible element of the region's identity.

Water-based recreation in WNY is supported by **consortium** of government agencies, non-profit organizations, and private businesses, with responsibilities ranging between fish stocking and licensing, water quality and invasive species management, water access infrastructure, boat rentals, maintaining waterfront parks, and other services and programs.

AREAS OF REGIONAL MOMENTUM & STRATEGIC ALIGNMENT

WATER TRAIL DEVELOPMENT

Water trails (also known as blueways) are designated routes for boating and/or paddling along navigable waterways. WNY is home to a growing network of water trails offering a variety of water-based recreation experiences.

Key recent, planned, and ongoing regional water trail development initiatives include:

- **New York State Canalway Water Trail:** this federally-designated National Water Trail comprises over 450 miles of interconnected canals, lakes, and rivers, including the Erie Canal in WNY. The trail received federal designation in 2022. There has been ongoing work to enhance water-based recreation along the water trail, including the launch of the Water Trail Stewardship Program by the Erie Canalway National Heritage Corridor in 2021. This program allows volunteer Water Trail Stewards to adopt sections of the water trail **and** perform routine maintenance of water access **infrastructure** and serve as ambassadors to visitors.
- **The Buffalo Blueway:** this water trail connects a growing number of urban water access points, parks, and points of interest along the Buffalo River, Niagara River, and Lake Erie. Future water access points are planned for Ralph C. Wilson, Jr. Centennial Park, Seneca Bluffs Natural Habitat Park, and the Harlem Road Fishing Access Point and Launch.

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

REGIONAL WATER-TRAIL DEVELOPMENT (CONTINUED)

- **Genesee River Blueway:** this water trail runs nearly the full length of the Genesee River starting at the Pennsylvania border and ending at Lake Ontario. The trail is served by dozens of public access points. Since 2012, Genesee River Wilds has opened 11 new public access sites along the river in Allegany County, with three additional proposed sites under consideration. A 2019 strategic plan developed by Genesee RiverWatch identified opportunities for new sites along stretches of the river with limited access along with needed infrastructure upgrades at existing sites. New wayfinding signs for the Blueway were installed along the full length of the river in 2020.
- **Paddles Up Blueway:** this water trail circumnavigates the shoreline of Grand Island in the Niagara River, providing access to paddling, fishing, and birdwatching opportunities. Originally established in 2006, the trail is served by an increasing number of water access points and is the focus of the annual Paddles Up Niagara event at Beaver Island State Park.



Genesee River Wilds. Source: *ILoveNY*.

WATER QUALITY: ESSENTIAL FOR RECREATION



Source: *Buffalo Niagara Waterkeeper*

The health of the region's waters is critical for supporting all forms of water-based recreation. Historical urban, industrial, and agricultural development in WNY resulted in significant impairment of WNY waterbodies, and significant work has been undertaken by government agencies and non-profit partners on remediation and restoration. Examples include the Buffalo River, where remedial dredging and habitat restoration projects led by Buffalo Niagara Waterkeeper are part of a sustained effort to get the waterway de-listed as a Great Lakes Area of Concern. Thanks to this work, the Buffalo River has flourished as a recreational asset, including hosting sections of the Buffalo Blueway.

Emerging threats to waterbodies, such as harmful algal blooms, warming water temperatures, and increased flood potential due to climate change, are the subject of ongoing monitoring and action. The 2022 New York State Environmental Bond Act allocated up to \$1.5 billion to climate change mitigation and not less than \$650 million to water quality improvement and resilient infrastructure statewide. To date, Bond Act grants have supported ten water quality improvement projects in WNY, including enhancements to wastewater infrastructure and treatment plants.

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

WATERFRONT RECREATION

In towns and cities throughout WNY, local waterfronts provide scenic backdrops for a variety of recreational amenities and events, while also facilitating access to water-based recreation opportunities. There has been increased investment in waterfronts in WNY, particularly in the region's downtowns and urban centers.

Key recent, planned, and ongoing regional waterfront recreation development initiatives include:

- **Buffalo Waterfront:** there has been significant investment to activate the Lake Erie shoreline in Buffalo, including multi-use paths, water access points, beaches, park areas, event spaces, public art, winter ice skating, and marinas. Work began in 2022 to establish Ralph C. Wilson Centennial Park, a \$110 million initiative led by the Ralph C. Wilson, Jr. Foundation to transform the former LaSalle Park into a world-class, 100-acre waterfront park, including establishing new water access, restoring a natural and resilient shoreline, creating a network of recreational paths, reconnecting the park to adjacent neighborhoods across Interstate 190, and creating a variety of sports **field** and recreational facilities.
- **ROC the Riverway:** this program covers over two dozen projects aimed at transforming Rochester's riverfront along the Genesee River. In 2020, Empire State Development awarded \$50 million through the Upstate Revitalization Initiative program for Phase 1 improvements, including

a reimagined Genesee Gateway Park (including new river access), creating and enhancing riverfront promenades, and purchase and operation of a downtown tour boat. An additional \$4 million in funding was announced in 2024 for the Aqueduct Reimagined project, which will establish a pedestrian and bicycle connection across the Genesee River between two riverfront promenades.

- **High Falls State Park:** part of the ROC the Riverway initiative, High Falls State Park will be New York State's newest State Park. The park will be centered around High Falls on the Genesee River in the heart of downtown Rochester. Key objectives will include ecological education, community programming, enhanced trail connections, and safe and equitable access. Site clean up and park planning commenced in 2023, with construction expected to begin in 2026 or 2027.
- **Lewiston Landing Park:** there have been a series of improvements to this Niagara River waterfront park in downtown Lewiston going back to the **1990's**. The park hosts a restaurant, public boat launch and boat slips, a waterfront walkway, picnic areas, jet boat tours of the Niagara River, and **historical** monument celebrating the Freedom Crossing along the Underground Railroad.

- **Brockport's Erie Canal Waterfront:** a long-term project of the Village of Brockport, the waterfront along the Erie Canal has been transformed into a recreational destination for users of the Canalway Water Trail and the Empire State Trail alike. The Brockport Welcome Center on the Erie Canal offers dockside electrical and water hookups for boaters, free overnight camping for cyclists, an accessible dock and kayak/canoe launch, and volunteer Brockport Ambassadors to assist visitors and orient them to the Brockport community.
- **Northern Chautauqua County Local Waterfront Revitalization Programs:** the Chautauqua County Planning Department is **current** leading a process to develop Local Waterfront Revitalization Programs (LWRPs) for a group of ten towns, villages, **cities**. Once complete, projects identified in LWRPs will be eligible for implementation funding through the NYS Department of State.



Canalside, Buffalo.

Source: ILoveNY

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

REGIONAL GAPS & OPPORTUNITIES

Water-based recreation is well-established and growing across WNY. Opportunities to further enhance water-based recreation in WNY include:

ACTIVATING INLAND FISHING EXPERIENCES

WNY has excellent inland fishing opportunities in addition to the renowned Great Lakes and their tributaries. Chautauqua Lake is already seeing increased recognition as a fishing destination, and there are other lakes and streams that provide excellent opportunities for fishing from shore or boat. NYSDEC performs significant fishing stocking of inland waterbodies in WNY, including prized trout species.

ACCESS TO WATER

Community partners around WNY are investing in connecting people to water-based recreation, including redevelopment of downtown waterfront promenades and parks and improving accessibility of public water access points. There still remain gaps where sections of water trails, lakeshores, and downtown waterfronts lack desired public access.

ENTREPRENEURIAL SUPPORT

Small entrepreneurs can play a key role in unlocking water-based recreation experiences for visitors who lack needed equipment or experience to enjoy the water. These operators can also be challenged by access to capital, insurance costs, and seasonal staff needs.



Marina at Chautauqua Lake. Source: *ILoveNY*



Underground Railroad in Buffalo, NY.

Source: ILoveNY

CULTURAL TOURISM

WNY is home to an enviable array of cultural landscapes and destinations. Visitors can experience works of world-famous artists and architects, local and touring performing artists, culinary delights, authentic small towns and agricultural landscapes, and major league sports. WNY's place in U.S. history and compelling cultural heritage adds further intrigue to visitor experiences. WNY also benefits from truly unique and distinctive cultural attractions, such as the National Comedy Center, Strong Museum of Play, Roycroft Campus, Lily Dale Assembly, and Chautauqua Institution.

The region's urban centers and rural villages host and sustain many of these cultural establishments, including cherished festivals and events. This ecosystem consists of governments, non-profits, and private businesses providing venues and programming to activate cultural experiences.

AREAS OF REGIONAL MOMENTUM & STRATEGIC ALIGNMENT

CULTURAL ITINERARY TRAIL DEVELOPMENT

In recent years, tourism partners in WNY have leaned into the value of cultural itinerary trails for activating local and regional tourism experiences. Itinerary trails unite shared regional assets to provide enriching tourism experiences, and can provide a catalyst for the development of new or enhanced cultural offerings. There are now over 30 cultural itinerary trails in WNY, including new trails established in the previous few years: **Barn Quilt Trail of Leroy Expansion (2023)**, **Niagara County By The Numbers Mural Trail (2022)**, **Upstate Eats Trail (2021)**, and the **Livingston County Inspirations Trail (2020)**.

INVESTMENT IN THE REGION'S VENUES

Recent, planned, and ongoing investments in WNY's stadiums and performing arts centers include:

- **New Highmark Stadium:** the future home of the Buffalo Bills, New Highmark Stadium is under construction in Buffalo, with completion scheduled for 2026.
- **ROC The Riverway:** significant investment is underway to activate the Genesee Riverfront adjacent to Blue Cross Arena in Rochester, including creation of new riverfront promenades and restaurants.
- **Colored Musicians Club & Jazz Museum:** a \$3 million expansion and **renovations** project is being supported by a \$2 million grant from Empire State Development's \$65 million East Side Corridor Economic Development Fund for Buffalo. The project includes a new building entrance and facade improvements, ADA-compliant accessibility upgrades, renovation and expansion of performance space, and fire safety improvements.

REGIONAL POWER ASSETS: MOMENTUM, GAPS, & OPPORTUNITIES

- **Roe Green Theatre Center:** the Roe Green Theatre Center will be a new performing arts facility for Chautauqua Theatre Company, including black box/flexible space, rehearsal studios, and offices. Completion of the Center has been advanced with a \$4.5 million grant from the Roe Green Foundation, announced in summer 2024.
- **Terminal B Events Center:** this \$13 million event center opened in 2024, providing a new outdoor event venue on Buffalo's waterfront

REGIONAL GAPS & OPPORTUNITIES

Opportunities to further enhance cultural tourism in WNY include:

- **Highlighting the potential of regional “cultural corridors” and itinerary trails.** Many of the region's cultural itinerary trails are confined to a single community or county. There are opportunities to enhance existing itinerary trails and create new, compelling cultural experiences by connecting linked destinations throughout the region.
- **Emphasizing the role of cultural events.** WNY's cultural authenticity shines through during long-time annual festivals and events. Supporting, and sustaining existing cultural events is critical; there are also exciting possibilities for regional partnerships to create new events based on shared resources and assets, including event series that move around the region.
- **Connecting cultural experiences and outdoor recreation opportunities, including activating the urban-rural connection.** WNY's mix of outdoor recreation and cultural destinations, indoor and outdoor activities, and proximity of urban centers and rural landscapes offers a well-rounded tourism region that is adaptable to changing seasons and weather. There is an opportunity to activate diverse itineraries and partnerships between urban and rural regions and outdoor recreation and cultural operators for the mutual benefit of all involved.



Source: ILoveNY / Jay Rosenblatt

CONNECTIVITY - AN ORGANIZING PRINCIPLE FOR REGIONAL TOURISM



The potential of regional tourism rests on the connections between communities, destinations, and experiences. This includes physical connections (e.g., roads, transportation services, trails) as well as programmatic and informational connections (e.g., organized tours, itinerary trails, digital platforms, guidebooks). The theme of **connection** is a cross-cutting strategic principle that can help inform future regional collaboration and strategic planning to enhance tourism for mutual benefit across WNY, including:

- Addressing gaps in regional trail systems and connecting downtowns to trailheads.
- Exploring “hub and spoke” opportunities for tourism promotion and investment.
- Activating connections between urban and rural assets for well-rounded visitor experiences.
- Uniting outdoor recreation and cultural experiences.
- Expanding access to public lands and waterways for recreationalists of all ability levels.
- Sustained regional collaboration.



This case study analysis delves into the dynamic world of regional tourism, exploring how diverse destinations leverage their unique assets and collaborative strategies to create thriving visitor economies. By examining successful initiatives in regions comparable to WNY, we aim to uncover best practices and innovative approaches that can inform and inspire the region's own tourism development efforts.

This chapter presents two sets of case studies. **Inspiration regions** are regions from around the United States with similar assets, landscapes, and built environments to WNY. Hamilton, Ontario is then identified and examined as a neighboring **benchmark region** with similar assets that has long been considered a competitor to WNY.

INSPIRATION REGIONS

- **The Pennsylvania Wilds:** A model for rural regionalism and sustainable tourism development.
- **Asheville, North Carolina:** A destination balancing natural beauty, outdoor adventure, and a thriving arts and culture scene, supported by a strong entrepreneurial ecosystem.
- **The Ozarks, Arkansas:** A region demonstrating the power of regional collaboration and sustainable tourism development, with a focus on outdoor recreation and community engagement.
- **Northwest Michigan:** A region leveraging collaborative branding and multi-county itineraries to showcase its natural beauty and diverse experiences.

BENCHMARK REGION

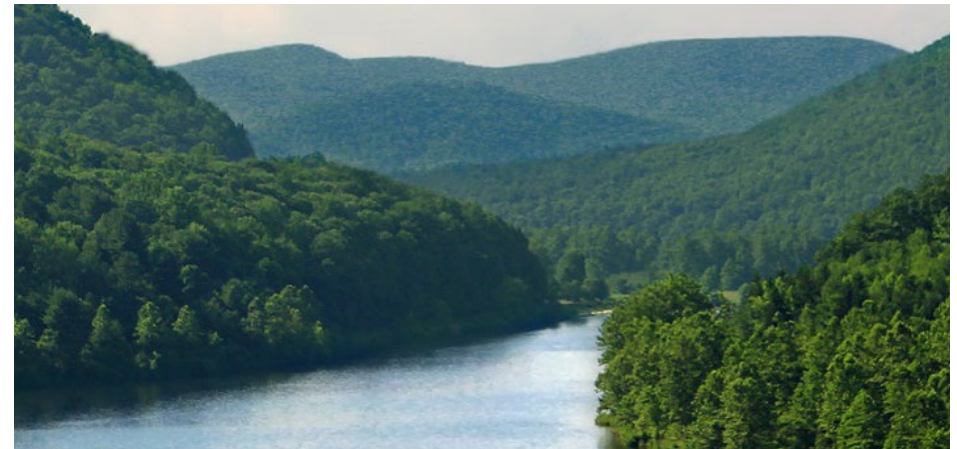
- **Hamilton, Ontario:** A city and region leveraging its proximity to Niagara Falls and cross-border collaboration to attract visitors and enhance regional tourism.

METHODOLOGY

The selection of case study regions was guided by several key criteria:

- **Comparability:** Regions with similar geographic characteristics, tourism assets, and target audiences to WNY.
- **Success:** Regions with a proven track record of success in tourism development, as evidenced by metrics such as visitor spending, economic impact, and brand recognition.
- **Innovation:** Regions that have implemented innovative strategies and initiatives in areas such as branding, marketing, and stakeholder collaboration.
- **Sustainability:** Regions that prioritize sustainable tourism practices and demonstrate a commitment to environmental stewardship and community well-being.

The analysis of each case study involved a comprehensive review of available data and resources, including tourism websites and marketing materials, economic impact reports, news articles, academic research, and industry publications.



Pennsylvania Wilds Region.

REGIONAL CASE STUDIES

KEY THEMES AND CONNECTIONS TO WNY

Several key themes emerge from these case studies, highlighting areas of strong alignment and transferable lessons for WNY:

URBAN-RURAL CONNECTIONS

- Each case study region successfully integrates complementary urban and rural experiences, showcasing the diversity of offerings and encouraging exploration beyond major cities. This resonates with WNY's own blend of vibrant urban centers, charming villages, and scenic natural landscapes.

TRAIL & WATER-BASED RECREATION

- Regional approaches to enhancing trail systems and connecting communities to waterbodies can inform future strategic planning and investment strategies for leveraging comparable assets in WNY.

BUILT ENVIRONMENT

- The revitalization of downtowns and the creation of vibrant public spaces, as demonstrated in Asheville and Hamilton, highlight the importance of investing in the built environment to enhance the visitor experience and attract investment.

CULTURAL ATTRACTIONS

- The integration of cultural attractions and experiences, such as museums, historical sites, and local festivals, adds depth and authenticity to the tourism offerings in each case study region. WNY can similarly leverage its rich cultural heritage to create a more compelling and diverse visitor experience.



Albion Falls, Hamilton, ON.

REGIONAL CASE STUDIES

PENNSYLVANIA WILDS

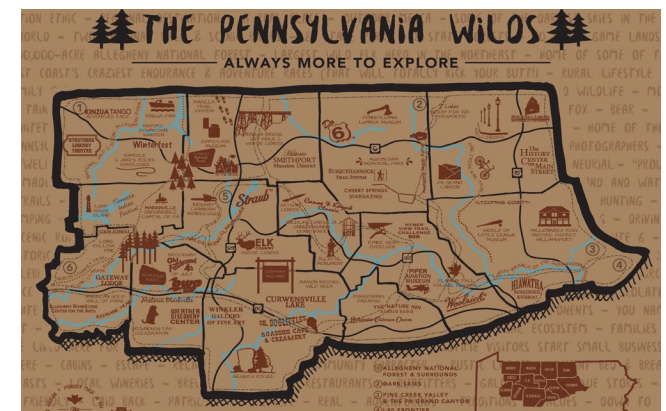
A MODEL FOR RURAL REGIONALISM AND SUSTAINABLE TOURISM

The Pennsylvania Wilds, a vast region encompassing 13 counties in north-central Pennsylvania, presents a compelling case study for WNY, particularly in its approach to rural regionalism and sustainable tourism development. Like WNY, the Pennsylvania Wilds boast abundant natural beauty, diverse recreational opportunities, and a rich cultural heritage. However, the region also faced challenges such as economic decline, population loss, and a lack of cohesive identity.

KEY STRATEGIES AND INITIATIVES

- **Long-Term Vision and Unified Branding:** The Pennsylvania Wilds initiative, launched in 2003, adopted a long-term vision for sustainable tourism, recognizing that success would require sustained effort and collaboration. A key component was the creation of a unified brand identity that emphasized the region's wild character, natural assets, and authentic experiences. This branding helped to create a sense of place and attract visitors seeking outdoor adventure and a connection to nature.
- **Capacity Building and Stakeholder Engagement:** Recognizing the importance of local ownership and expertise, the Pennsylvania Wilds initiative invested heavily in capacity building and stakeholder engagement. This involved providing training and resources to local businesses, communities, and organizations, empowering them to participate in and benefit from tourism development.
- **Celebrating Local Nuances and Key Attractions:** The Pennsylvania Wilds celebrates the unique character and attractions of each county within the region. This approach allows individual communities to showcase their distinct identities while contributing to the overall appeal of the region. Key attractions, such as the Elk Country Visitor Center, Cherry Springs State Park (a Dark Sky Preserve), and the Pine Creek Gorge (the "Grand Canyon of Pennsylvania"), serve as anchor destinations and draw visitors to explore the surrounding areas.
- **Partnership with PA State Parks:** The Pennsylvania Wilds initiative has forged a strong partnership with the Pennsylvania Department of Conservation and Natural Resources (DCNR), which manages the state parks within the region. This collaboration has led to improved infrastructure, enhanced visitor amenities, and increased marketing efforts, benefiting both the parks and the surrounding communities.

- **Growth of Entrepreneurial Engines:** The Pennsylvania Wilds has fostered the growth of entrepreneurial engines in downtown and gateway communities. This has involved supporting the development of small businesses, artisan shops, and outdoor recreation outfitters, creating jobs and diversifying the local economy.



REGIONAL CASE STUDIES

MOUNTAIN BIZWORKS

GROWING THE OUTDOOR RECREATION ECONOMY IN WESTERN NORTH CAROLINA

Western North Carolina, like WNY, boasts a stunning natural landscape, a rich cultural heritage, and a growing outdoor recreation industry. Asheville serves as the region's urban center, cultural hub, and outdoor adventure gateway, with many other small towns dotting the landscape. Mountain BizWorks, a non-profit community development financial institution, has played a crucial role in supporting the region's economic growth by providing resources and guidance to small businesses, with a focus on those in the outdoor sector.

KEY STRATEGIES AND INITIATIVES

OUTDOOR RECREATION ECONOMY

Mountain BizWorks recognizes the significant economic potential of the outdoor industry in Western North Carolina and has developed targeted programs and initiatives to support businesses in this sector, including:

- **Access to Capital:** Providing loans and financing options specifically designed for outdoor recreation businesses.

- **Business Training and Mentorship:** Offering workshops, training programs, and one-on-one mentorship to help entrepreneurs start and grow their businesses.
- **Industry Networking and Collaboration:** Facilitating networking events and creating opportunities for collaboration among outdoor recreation businesses and organizations.
- **Advocacy and Policy Support:** Advocating for policies that support the growth and sustainability of the outdoor industry.

MULTI-COUNTY TOURISM PROMOTION AND STRATEGY

Mountain BizWorks collaborates with other organizations and stakeholders to promote tourism across twenty six counties in Western North Carolina. They recognize the importance of a regional approach to attract visitors and enhance the overall experience. Key strategies include:

- **Regional Branding and Marketing:** Supporting initiatives that promote the region as a unified destination for outdoor recreation and cultural tourism.
- **Developing Multi-County Itineraries:** Encouraging the creation of itineraries and packages that showcase the diverse offerings across the region, encouraging visitors to explore multiple counties and stay longer.
- **Supporting Local Businesses:** Providing resources and guidance to local businesses to enhance their tourism offerings and create authentic experiences for visitors.

- **Building a strong business-friendly ecosystem:** Building relationships between entrepreneurs to advocate for business-friendly practices and ideas. Cultivating a strong climate of economic gardening, building on the natural resources, infrastructure, and quality of life in the mountains of Western North Carolina.

DISASTER RECOVERY

In the aftermath of Tropical Storm Helene, Mountain BizWorks was able to rapidly leverage capital and community connections to launch the WNC Strong: Helene Business Recovery Fund. The fund offers low-interest bridge loans of up to \$100,000 to small businesses affected by flooding, providing a key financial bridge for businesses until longer-term federal relief funds are made available.



REGIONAL CASE STUDIES

THE OZARKS

A MODEL FOR REGIONAL COLLABORATION AND SUSTAINABLE TOURISM

The Ozarks, spanning Missouri and Arkansas, offer a valuable model for WNY in regional tourism development. With its diverse landscapes and urban centers, the Ozarks attract visitors for outdoor recreation, nature, and culture, using collaborative initiatives and strategic branding to drive tourism and economic growth.

THE FUTURE OZARKS FOUNDRY

The Future Ozarks Foundry is a non-profit organization dedicated to promoting economic development and community revitalization in the Ozarks. It plays a crucial role in supporting entrepreneurship, workforce development, and regional collaboration. The Foundry's focus on sustainable economic growth aligns with WNY's goals of leveraging tourism to benefit local communities and preserve natural resources.

KEY STRATEGIES

- **Entrepreneurial Support:** Providing resources, training, and mentorship to entrepreneurs and small businesses in the tourism and outdoor recreation sectors.
- **Workforce Development:** Collaborating with educational institutions and community partners to develop a skilled workforce that can support the growing tourism industry.

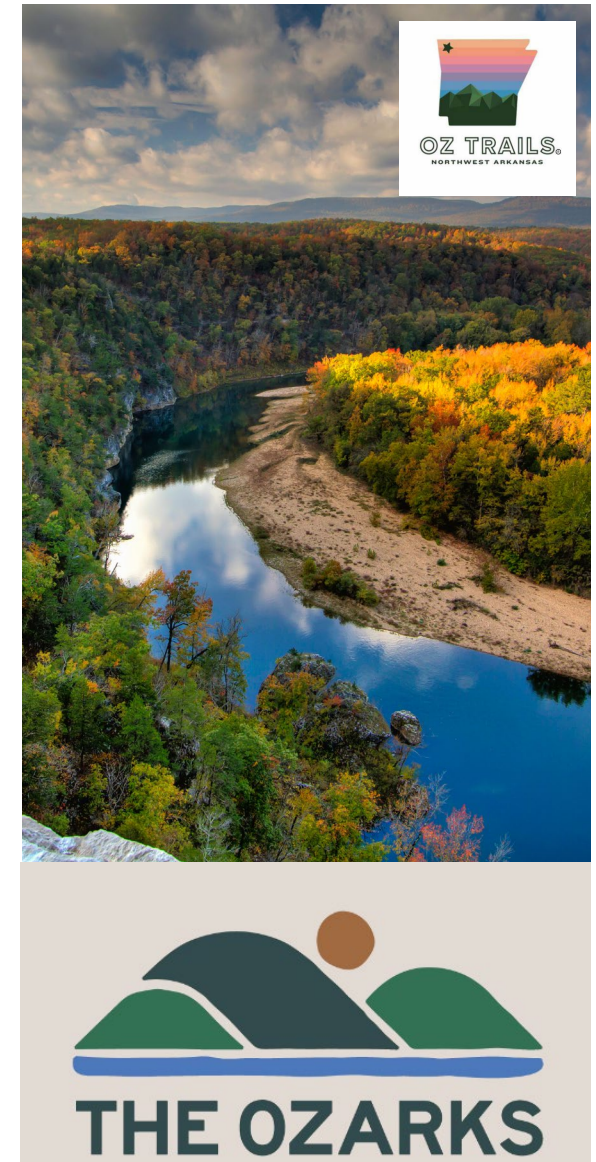
- **Regional Collaboration:** Facilitating partnerships and initiatives that bring together stakeholders from across the region to address common challenges and pursue shared opportunities.
- **Sustainable Development:** Promoting responsible tourism practices that protect the environment and enhance the quality of life for residents.

OZ TRAILS: A MODEL FOR REGIONAL CONNECTIVITY

Oz Trails is a regional network of shared-use trails that spans across multiple counties in Northwest Arkansas. This initiative demonstrates the power of collaboration and strategic planning to create a premier outdoor recreation destination.

KEY FEATURES

- **Diverse Trail System:** Offering a variety of trails for different skill levels and interests, including mountain biking, hiking, and trail running.
- **Urban-Rural & Regional Connectivity:** Connecting communities and attractions across county lines, encouraging visitors to explore the broader region.
- **Collaborative Management:** Involving multiple stakeholders in the planning, development, and maintenance of the trails.
- **Economic Impact:** Generating significant economic benefits for local communities through increased tourism spending and job creation.



REGIONAL CASE STUDIES

NORTHWEST MICHIGAN

A DEEPER DIVE INTO REGIONAL STRATEGIES

This Great Lakes region has found success in tourism **can** be largely attributed to its strong regional approach, which emphasizes collaboration, shared branding, and a focus on multi-county experiences. The region recognizes that visitors often don't adhere to county lines when exploring, and therefore, a unified strategy that promotes the entire area as a cohesive destination is crucial.

KEY ELEMENTS

SUCCESSFUL REGIONAL STRATEGY

- **Unified Branding:** The "Pure Michigan" campaign serves as an overarching brand that encompasses the entire state, while also allowing for regional variations that highlight specific areas' unique offerings. This creates a sense of cohesion while still allowing individual communities to showcase their distinct character.
- **Collaborative Marketing:** Tourism organizations across the region pool resources and expertise to develop and implement joint marketing campaigns. This increases efficiency, reach, and ensures a consistent message across multiple counties.

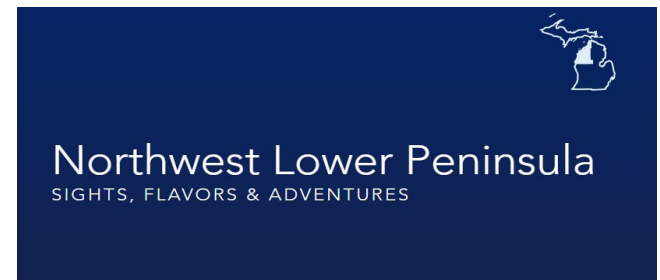
- **Multi-County Itineraries:** The region promotes itineraries and packages that encourage visitors to explore multiple destinations and stay longer. This approach recognizes that visitors are seeking diverse experiences and are more likely to spend more time and money when presented with compelling multi-day options.
- **Shared Resources and Infrastructure:** Collaboration extends to infrastructure development and resource management, with counties working together to improve transportation connectivity, enhance visitor amenities, and protect natural resources.

MARKETING MULTIPLE COUNTY REGIONS

Northwest Michigan effectively markets its multiple county regions by:

- **Highlighting Diversity:** Showcasing the variety of experiences available across the region, from outdoor adventures to cultural attractions and culinary delights.
- **Creating Themed Itineraries:** Developing itineraries based on specific interests, such as wine trails, scenic drives, or historical tours, that encourage exploration of multiple counties.
- **Leveraging Digital Platforms:** Utilizing websites, social media, and mobile apps to provide comprehensive information and interactive tools for planning multi-destination trips.

- **Partnering with Local Businesses:** Engaging local businesses in marketing efforts to create authentic and immersive experiences.



HAMILTON, ON, CANADA

A MODEL FOR LEVERAGING PROXIMITY AND CROSS-BORDER COLLABORATION

Hamilton, Ontario, located just across the border from WNY, offers a compelling case study for understanding how to leverage Canadian proximity and cross-border collaboration to enhance regional tourism. As a vibrant city with a diverse range of attractions, Hamilton can serve as a complementary destination for visitors to Niagara Falls, encouraging them to extend their stay and explore the broader region.

SUCCESSFUL INITIATIVES

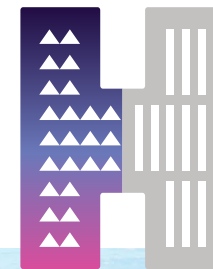
PACKAGES, EVENTS, & FESTIVALS

- **The “Niagara Falls & Hamilton Getaway” Package:** A collaborative marketing campaign promoting a multi-day itinerary that includes visits to both Niagara Falls and Hamilton’s key attractions.
- **The “Niagara-on-the-Lake & Hamilton Wine Route”:** A scenic driving route connecting the wineries of Niagara-on-the-Lake with those in Hamilton’s burgeoning wine region.
- **The “Arts & Culture Festivals”:** Multiple festival celebrating the diverse artistic expressions, holidays successfully attracting visitors and fostering cultural exchange.

BRINGING VISITORS ACROSS THE BORDER

Hamilton employs several strategies to attract US visitors:

- **Cross-border marketing campaigns:** Targeted advertising and promotional efforts in US markets, highlighting the unique experiences Hamilton offers.
- **Joint initiatives with Niagara Falls:** Partnering with Niagara Falls tourism organizations to create packages and itineraries that combine the iconic waterfall with Hamilton’s attractions.
- **Leveraging events and festivals:** Hosting events and festivals that appeal to US visitors, such as music festivals, food festivals, and cultural celebrations.
- **Promoting accessibility:** Highlighting the ease of access from the US, including convenient border crossings and transportation options.



TOURISM
HAMILTON



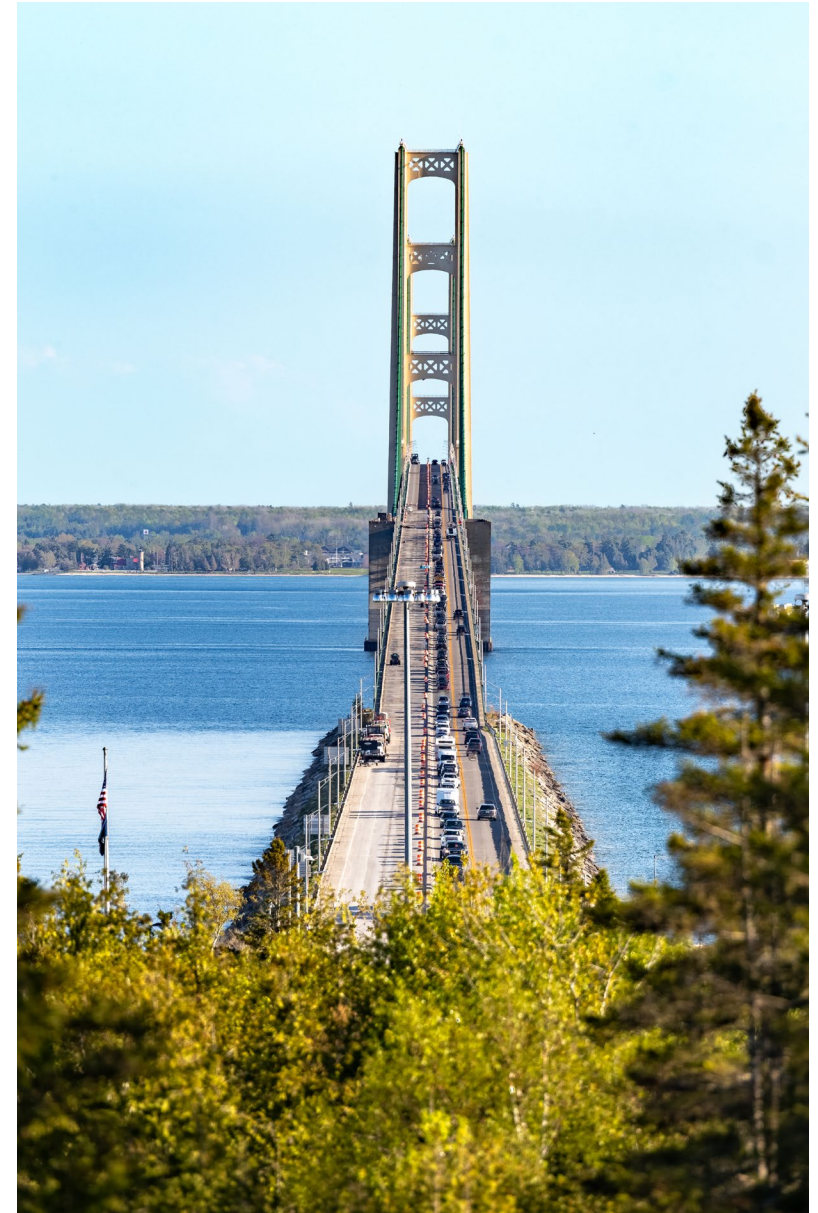
REGIONAL CASE STUDIES

KEY TAKEAWAYS

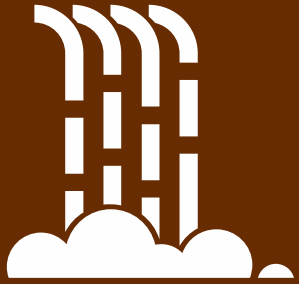
These case studies illuminate the power of regional collaboration, strategic branding, and sustainable practices in creating thriving tourism destinations. By examining the successes of Northwest Michigan, the Asheville area, the Ozarks, and Hamilton, Ontario, we can identify key takeaways and drivers of success for regional tourism planning, collaboration, and investment.

DRIVERS OF SUCCESS IN CASE STUDY REGIONS

- **Unifying Under a Regional Brand:** A strong regional brand identity, like “Pure Michigan” or the collaborative branding efforts in the Ozarks, can unify diverse offerings and create a cohesive regional image in the minds of visitors. This involves emphasizing shared assets like waterways, outdoor adventure, and cultural heritage while being flexible to allow individual communities to retain their unique character.
- **Hub-and-Spoke Approach:** Leveraging “hub” destinations while developing compelling “spokes” to connect other attractions and communities, can encourage regional exploration and extend visitor stays. This approach has been successful in Northwest Michigan with its scenic M-22 highway and in the Ozarks with its extensive trail network.
- **Strategic Investments Informed by Place:** Understanding the unique characteristics of each place, its brand identity, and potential catalysts for growth is crucial for making informed investment decisions. WNY can learn from Asheville’s focus on uniting nature-based recreation and cultural attractions and the Ozarks’ emphasis on sustainable tourism development.
- **Collaborative Marketing & Strategic Alignment:** Joint marketing initiatives and strategic alignment among tourism stakeholders can amplify reach and cost-efficiency. WNY can draw inspiration from the collaborative efforts in Northwest Michigan and the cross-border partnerships between Niagara Falls and Hamilton.
- **Sustained Regional Capacity:** Building and maintaining regional capacity through partnerships, funding, and workforce development has been essential for long-term success. The Ozarks’ Future Ozarks Foundry and Mountain BizWorks in Western North Carolina offer valuable models for supporting tourism initiatives and fostering collaboration.



Mackinac Bridge, Michigan.



Appendix A

COUNTY TOURISM PROFILES

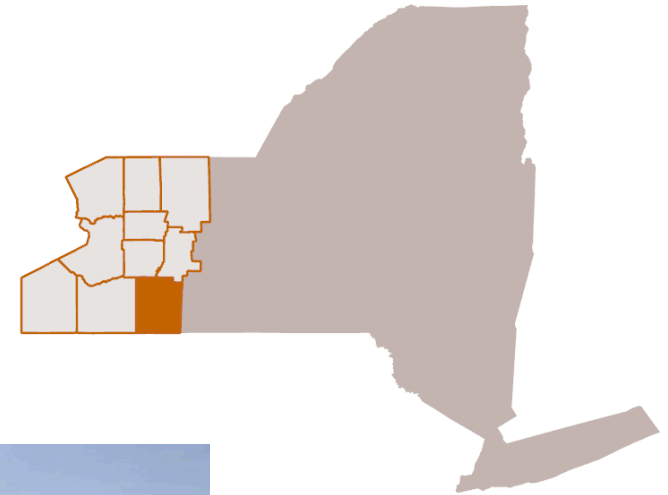


COUNTY PROFILES

Allegany County

POPULATION: 47,222

Allegany County is characterized by rolling hills, steep ridges, and deep valleys, supporting rich mixed forests like oak, maple, and hickory. The county has been shaped by glacial activity, featuring flat terrains and numerous lakes and streams that foster diverse ecosystems. Major Water bodies include the Genesee River which winds along the eastern edge of Allegany County, ultimately emptying into Lake Ontario. Nearby, Rushford Lake serves as a man-made reservoir, primarily designed for recreation. In the northern part of the county, Cuba Lake attracts visitors with its excellent fishing and boating opportunities. The county's population is spread out, contributing to its tranquil, community-focused atmosphere. The most populated communities are Hornell, Wellsville, and Alfred all with between 5,900 to 7,900 residents.



**\$83
Million**
IN VISITOR
SPENDING IN 2023

4.9%
SPENDING
GROWTH
BETWEEN
2019-2023



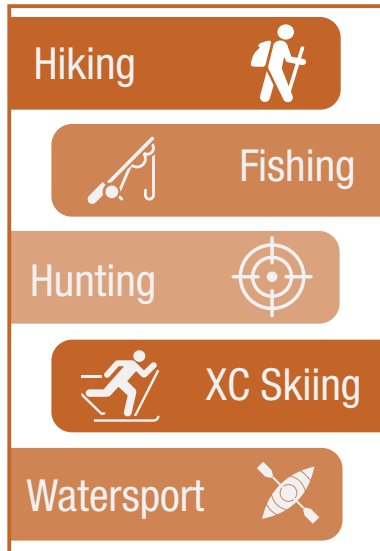
Image: Wellsville, NY, photo courtesy of Allegany County

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Western NY Wilds serves as the main tourism initiative for Allegany County, strategically designed to attract visitors.

State Support: The campaign is backed by ILoveNY.com, a key tourism entity in New York State, enhancing its visibility and credibility.

Comprehensive Resources: The website offers extensive lists of tourism assets throughout the county, including recreation, art, museums, dining options, and more, providing a well-rounded overview for potential visitors.

Strong Branding: The branding of Western NY Wilds is both strong and clear, effectively conveying the essence of Allegany County as an appealing rural getaway.

Targeted Messaging: The campaign focuses on framing the county as an ideal destination for those seeking a peaceful retreat in nature, catering to tourists looking for a unique escape.



Key Promoter: The Allegheny National Forest Visitor Bureau promotes tourism in Allegheny County through a dedicated webpage on their official website.

Contact Information: The webpage includes essential contact information for the Greater Allegheny Chamber, facilitating visitor inquiries and support.

Outdoor Recreation Focus: The content primarily highlights outdoor recreation assets, showcasing the region's natural beauty and activities available to tourists.

Connection to the Allegheny National Forest: The page features numerous references to the Allegheny National Forest, emphasizing its significance as a major attraction that extends beyond Allegany County, thereby enhancing regional tourism appeal.

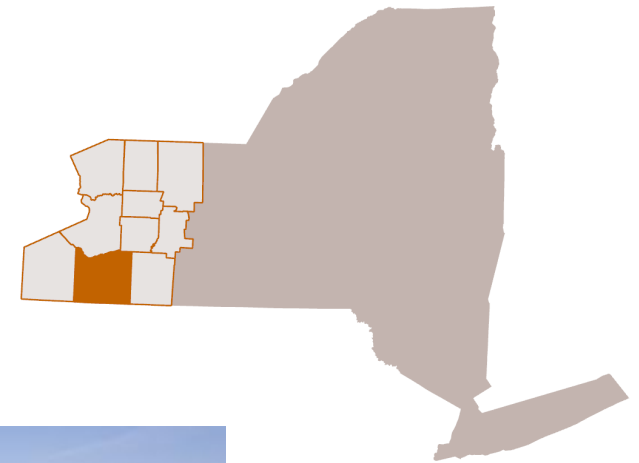
Visitor Resources: Provides visitors with valuable information on recreational opportunities, including hiking, camping, and wildlife observation, fostering engagement with the area's natural resources.

COUNTY PROFILES

Cattaraugus County

POPULATION: 77,042

Cattaraugus County boasts a diverse landscape of rolling hills, lush forests, and significant water bodies such as the Allegheny River and Cattaraugus Creek. The largest city, Olean, has a population of 13,563, and serves as a commercial hub with a vibrant downtown. Salamanca, known for its cultural heritage and connections with the Seneca Nation, adds to the county's charm. The region's rural character is highlighted by the natural beauty of areas like Allegany State Park, the largest state park in New York State. Ellicottville and other attractions like Holiday Valley also present opportunities for outdoor recreation seekers. The county has some of the highest percentages of labor income and employment from tourism in the region.



**\$316
Million**
IN VISITOR
SPENDING IN 2023

6.3%
SPENDING
GROWTH
BETWEEN
2019-2023



Image: Red House Lake, Allegany State Park

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Cattaraugus County's tourism is primarily promoted through the Enchanted Mountains campaign, which emphasizes the region's unique attractions.

Recent Rebranding: The campaign recently underwent a significant rebranding process, enhancing its appeal and effectiveness in attracting visitors.

User-Friendly Navigation: The front page features essential categories for visitors, including "Explore," "Where to Stay," "What to Do," and a "Calendar of Events," making it easy for tourists to plan their trips.

Outdoor Recreation Focus: The tourism strategy highlights outdoor recreation as a primary focus, showcasing the county's natural beauty and adventure opportunities.

Geographical Diversity: Cattaraugus County spans 1,336 square miles and is home to thirteen villages, thirty-two townships, and two cities, offering a diverse range of experiences.

Allegany State Park: Home to the largest state park in New York and the third largest in the United States, Allegany State Park is a central attraction for nature enthusiasts.

Ellicottville Ski Destination: Ellicottville, often referred to as the "Aspen of the East," features two ski resorts and a tubing park, making it a popular winter sports destination.

Gateway to Adventure: Salamanca, NY serves as the gateway to Allegany State Park, positioning it as a key access point for visitors seeking outdoor adventures.

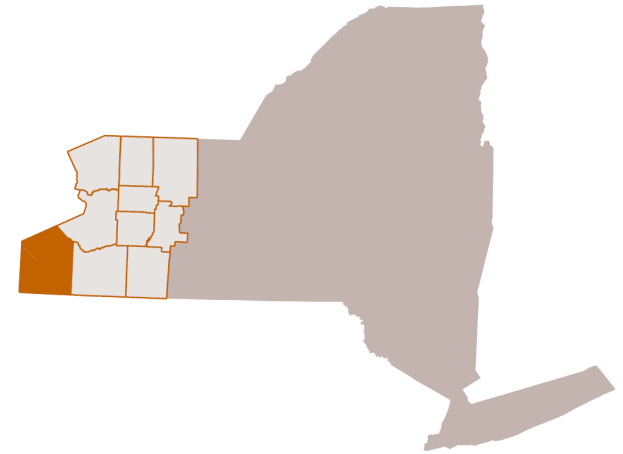
Cultural Heritage: The western portion of Cattaraugus County is home to New York's Amish Trail, offering a unique cultural experience for visitors interested in Amish traditions and lifestyle.

COUNTY PROFILES

Chautauqua County

POPULATION: 127,657

Chautauqua County has a diverse landscape of rolling hills and forests, and its picturesque lakefronts along Lake Erie. Besides Lake Erie, major waterbodies include Chautauqua Lake, a popular spot for boating and fishing, and various smaller lakes and rivers that enhance the region's scenic beauty. The county's largest city is Jamestown, known for its rich cultural heritage, including the Roger Tory Peterson Institute and the National Comedy Center. The city of Dunkirk is located on Lake Erie with beautiful waterfront areas and large beaches. In contrast, small Victorian villages like Fredonia have the Fredonia Opera House and institutions like SUNY Fredonia. Overall, Chautauqua County combines recreational opportunities, a vibrant arts scene, and a strong agricultural presence, making it a unique destination that appeals to both residents and visitors alike.



**\$314
Million**
IN VISITOR
SPENDING IN 2023

6.8%
SPENDING
GROWTH
BETWEEN
2019-2023



Image: Glen Mills Falls, Westfield, NY

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Tourism in Chautauqua County is promoted through the Chautauqua County Visitor Bureau, and associated website and blog.

Diverse Attractions: The front page highlights key features for visitors, including "Explore Chautauqua County," wine tourism, recreation, fishing, golf, and historical sites.

Historical Significance: In 2024, Chautauqua County will celebrate its 100th birthday. The tourism campaign highlights this aspect and the significant history found within the county.

Economic Development through Placemaking: The county focuses on placemaking as a means of economic development, enhancing the quality of life through consistent improvements in recreation, housing, employment, and infrastructure.

Downtown Revitalization: Recent efforts in downtown areas, particularly in Dunkirk, have been bolstered by the NYS Downtown Revitalization Initiative (DRI) awarded in 2023, funding transformative business and placemaking projects. The city of Jamestown, an early DRI recipient, connected its riverfront through the Jamestown Riverwalk.

Cultural Attractions: Many of the unique cultural experiences are promoted such as the National Comedy Center and the Roger Tory Peterson Institute. Visitors can also explore local towns for shopping and dining.

Wine and Craft Beverage Focus: Campaign encourages tasting wines from over 20 local wineries along the Lake Erie shoreline, collectively known as Lake Erie Wine Country, or enjoy craft beverages from local breweries and distilleries.

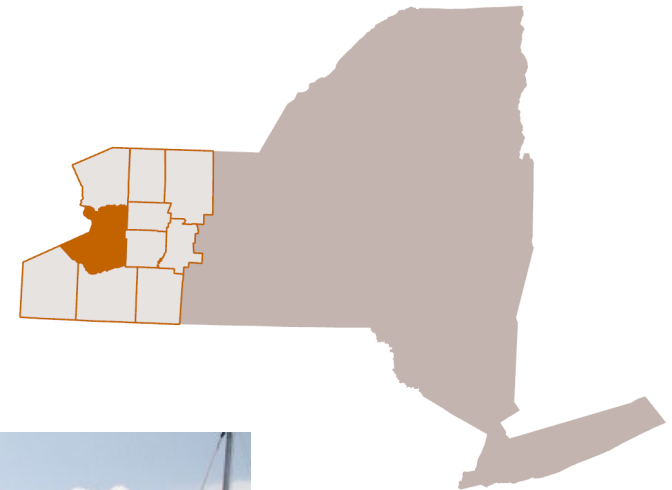
Interactive Trip Planning: The website features an interactive trip planner page with suggested itineraries to help visitors maximize their experience in the region.

COUNTY PROFILES

Erie County

POPULATION: 954,236

Erie County is a diverse region known for its urban areas, scenic landscapes, and rich history. Covering approximately 1,044 square miles, it features a mix of flat plains and rolling hills, with Lake Erie along its southern border providing waterfront views and recreational opportunities. The county is home to Buffalo, the largest city and county seat, as well as notable suburbs like Hamburg, East Aurora, Williamsville, Tonawanda, and Lancaster. Key waterbodies include the Niagara River and the Buffalo River, which enhance the area's natural beauty. Erie County is part of the Buffalo-Niagara Falls metropolitan area, offering cultural institutions, parks, and historical significance, including its role as terminus of the Erie Canal.



**\$2,423
Million**
IN VISITOR
SPENDING IN 2023

11.2%
SPENDING
GROWTH
BETWEEN
2019-2023



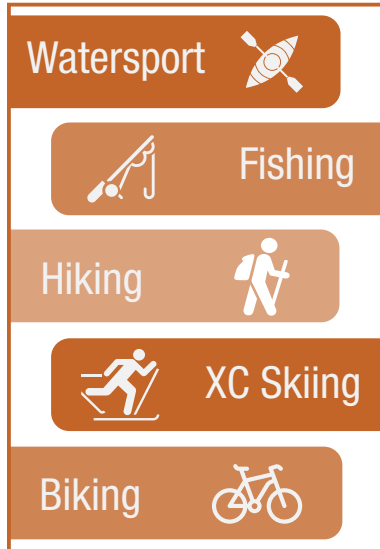
Image: Erie Basin Marina, Buffalo, NY

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Erie County does not have its own specific tourism page, relying instead on the main “Visit Buffalo Niagara” tourism page and smaller, independent blogs that highlight a variety of the counties assets.

Buffalo's Role: As the largest city and county seat, Buffalo is the focal point for tourism promotion within Erie County, with most assets highlighted in this urban center.

Cultural Tourism Focus: Promotion within Erie County is heavily centered on cultural tourism, emphasizing the arts, entertainment options, and diverse food and drink establishments.

Limited Outdoor Recreation Promotion: Outdoor recreation is not consistently highlighted in the county's tourism efforts, potentially overlooking a significant aspect of the area's offerings.

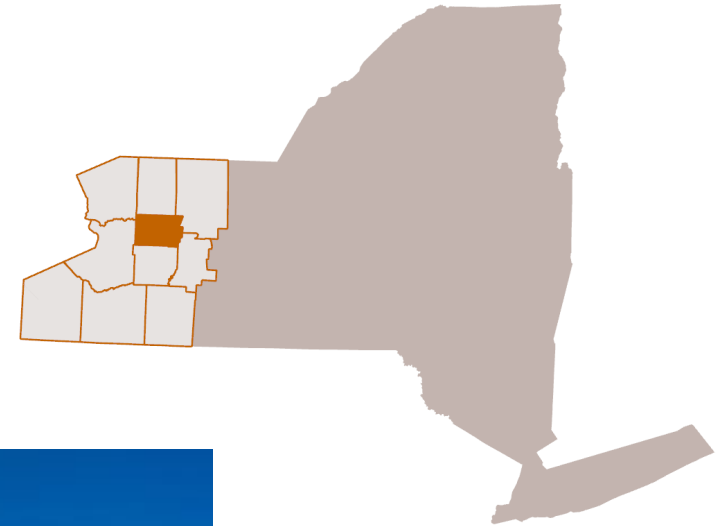
Need for Comprehensive Resources: While the Buffalo tourism page is well developed, the absence of a more comprehensive tourism page for Erie County limits the visibility of attractions outside the city, including outdoor activities and rural experiences.

COUNTY PROFILES

Genesee County

POPULATION: 57,529

Genesee County features landscapes of rolling hills and fertile farmland, intersected by the Genesee River and several smaller waterways that enhance its natural beauty. The county's most populated municipalities include Batavia, the county seat, along with Le Roy and Bergen, which serve as key commercial centers. Culturally, Genesee County boasts a rich agricultural heritage, evident in its farmers' markets and seasonal festivals, such as the annual Genesee County Fair, which celebrates local crafts and livestock. The area is home to historical sites and recreational parks, promoting outdoor activities and community engagement. Genesee County offers a welcoming environment for both residents and visitors seeking the charm of rural New York.



**\$140
Million**
IN VISITOR
SPENDING IN
2023

9.7%
SPENDING
GROWTH
BETWEEN
2019-2023



Image: Holland Land Office Museum, Batavia, NY

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: The tourism initiative is run by the Genesee County Chamber of Commerce and Visitor Center.

User-Friendly Website: The newer website features an accessible design that enhances user experience for visitors planning their trips. The front page prominently displays essential categories for tourists, including "What to Do," "Where to Stay," and "Where to Eat," making information easy to find. Each category on the website includes a detailed and comprehensive list of various tourism assets, helping visitors discover a wide range of activities and attractions.

Unique Highlights: The county emphasizes eco-tourism and celebrates its unique claim as the birthplace of Jell-O, adding a quirky appeal to its tourism offerings.

Strategic Location: Genesee County frames itself as being conveniently located less than an hour from the Canadian border and Niagara Falls to the west, and the Finger Lakes Region to the east, making it an ideal base for exploring the surrounding areas.

Accommodation and Dining: With over 1,000 hotel rooms and a variety of dining options, Genesee County hopes to cater to diverse preferences, ensuring something for every visitor.

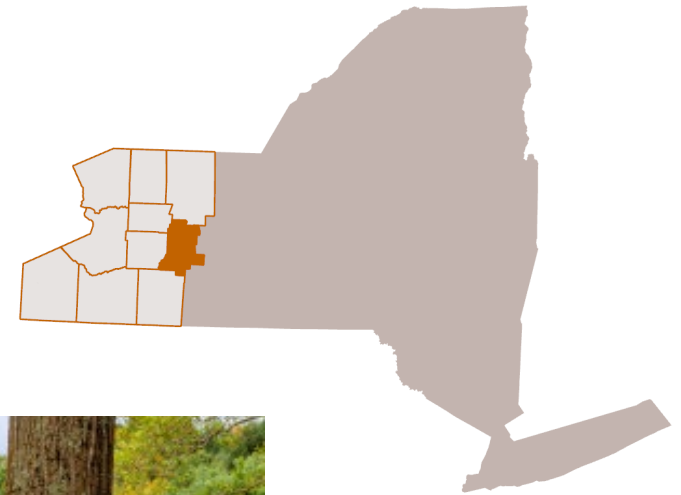
Attractive Packages: The county offers appealing getaway packages, including options for golf getaways and Six Flags packages with hotel accommodations, enhancing the overall travel experience.

COUNTY PROFILES

Livingston County

POPULATION: 61,158

Livingston County is characterized by its picturesque landscape of rolling hills, fertile farmland, and a mix of woodlands and open spaces. The county is home to several significant water bodies, including the Genesee River, which flows through the region, as well as Conesus Lake and Hemlock Lake offering recreational opportunities such as boating and fishing. The most populated municipalities include Genesee, the county seat, and Mount Morris, along with Livonia and Avon, which serve as vibrant community hubs. Culturally, Livingston County has a rich heritage reflected in its historical sites, local festivals, and agricultural events, such as the annual Livingston County Fair.



**\$77
Million**
IN VISITOR
SPENDING IN
2023

9.5%
SPENDING
GROWTH
BETWEEN
2019-2023



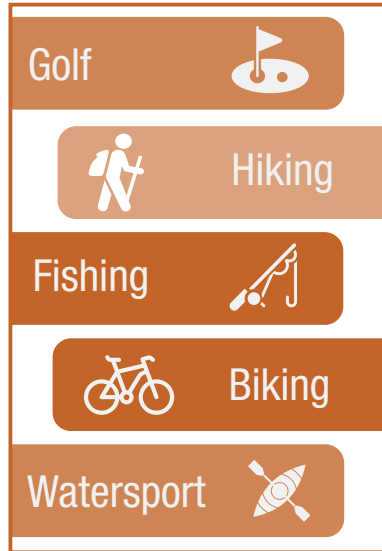
Image: Upper Falls and Genesee Arch Bridge at Letchworth State Park

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: LivCo is the main tourism page for Livingston County, affiliated with ILoveNY. Extensive information is provided on outdoor recreation, local attractions, events, and dining options, ensuring visitors have access to a wide range of activities.

Emphasis on Sustainability: The website promotes eco-tourism and sustainability, showcasing opportunities for fresh air activities like biking and agriculture, and encouraging environmentally responsible tourism. Campaign promotes work of organizations like Genesee Valley Conservancy.

Highlighting Hidden Gems: Livingston County is promoted as a hidden gem, featuring Letchworth State Park and serving as the westernmost gateway to the Finger Lakes, positioning LivCo as an ideal basecamp for outdoor and cultural experiences.

Scenic Genesee River Valley: The website showcases the stunning Genesee River Valley, characterized by beautiful and historic villages, deep gorges, and fertile farmland, with the river itself featuring six waterfalls—three in Rochester and three within Letchworth State Park.



Key Promoter: The Chamber of Livingston County has a site that primarily caters to business resources, but also includes valuable information to help support the local tourism industry.

Tourism on the Homepage: The homepage features a dedicated section with business directories categorized into "Where to Eat," "Where to Shop," and "Where to Play," helping visitors easily navigate local offerings.

Support for Local Economy: By promoting local dining, shopping, and recreational options, the site encourages visitors to engage with the community and support local enterprises.

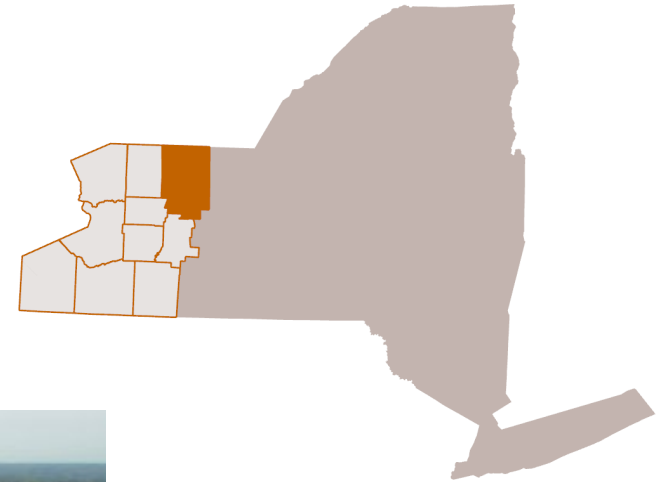
Distinct from LivCo Tourism Page: This resource is separate from the LivCo tourism page.

COUNTY PROFILES

Monroe County

POPULATION: 748,482

Monroe County blends urban and rural environments. The county is home to significant water bodies, including Lake Ontario to the north and the Genesee River, which flows through the city of Rochester, the county seat and largest municipality. The Erie Canal also flows through the county, with Canal villages like Brockport, Spencerport, Fairport, and Pittsford. Culturally, Monroe County boasts a rich array of attractions, including the Strong National Museum of Play, the George Eastman Museum, and various festivals celebrating art, music, and food. The area is also known for its outdoor recreational opportunities, with parks and nature trails that invite residents and visitors alike to explore its natural beauty.



**\$1,492
Million**

IN VISITOR
SPENDING IN
2023

17.3%

SPENDING
GROWTH
BETWEEN
2019-2023



Image: Schoen Place and the Erie Canal, Pittsford, NY

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: The main tourism page for Monroe County is hosted on the Visit Rochester website. While Monroe County is featured on Finger Lakes tourism pages, links eventually direct users back to the Rochester Tourism page. The website is affiliated with the ILoveNY tourism organization.

Focus on Rochester and Surrounding Areas: The site highlights attractions and activities within the city of Rochester as well as its immediate surrounding areas.

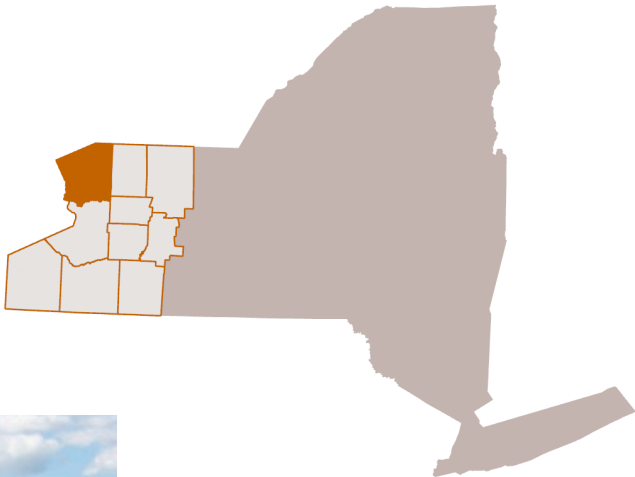
Diverse Attractions: The website emphasizes a variety of experiences, including arts and culture, a beer trail, and the county's significant civil rights history, appealing to a wide range of interests.

COUNTY PROFILES

Niagara County

POPULATION: 209,457

Home of the world famous Niagara Falls, Niagara County includes a mix of rural farmland and scenic waterfronts along Lake Ontario and the Niagara River. Major municipalities in the county include Niagara Falls, the county seat; Lockport, known for its historic Erie Canal; Youngstown with Fort Niagara State Park; and North Tonawanda, which offers a charming small-town atmosphere. Culturally, Niagara County boasts a rich heritage reflected in its historical sites, such as the Lockport Cave and the Niagara Power Vista, along with a vibrant arts scene and local festivals celebrating food, music, and community.



**\$1,082
Million**

IN VISITOR
SPENDING IN
2023

11.7%

SPENDING
GROWTH
BETWEEN
2019-2023



Source: Tourism Economics

Image: Niagara Falls, NY

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Niagara County's tourism is actively promoted by Destination Niagara USA, serving as the primary resource for visitors seeking information and experiences in the area.

Focus on Niagara Falls State Park: The website prominently features Niagara Falls State Park, highlighting its natural beauty and the iconic waterfalls that draw millions of tourists each year.

Comprehensive Coverage: In addition to Niagara Falls, the site promotes a wide range of attractions throughout the county, including shopping destinations, recreational activities, and local eateries.

Wineries and Vineyards: The tourism promotion emphasizes the region's burgeoning wine industry, showcasing various wineries that offer tastings and tours, appealing to wine enthusiasts.

Events and Festivals: Destination Niagara USA also promotes local events and festivals, encouraging community participation and enriching the visitor experience with seasonal celebrations. There is also an emphasis on attracting Wedding events to the area.

Access to Outdoor Recreation: The tourism page emphasizes outdoor recreational opportunities, such as hiking, biking, and fishing, which take advantage of the county's natural landscapes.

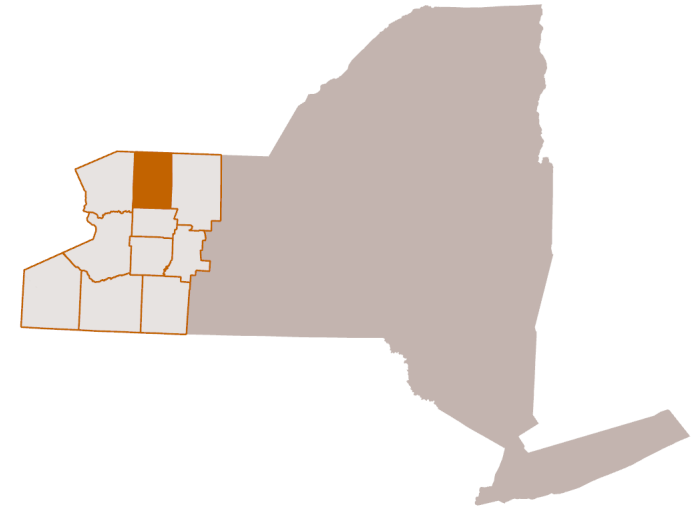
Local Culture and Heritage: The promotion includes insights into the region's rich cultural heritage, encouraging visitors to explore historical sites and community events that celebrate local traditions.

COUNTY PROFILES

Orleans County

POPULATION: 39,124

Orleans County is a picturesque rural area home to significant water bodies, including Lake Ontario to the north and the Erie Canal, which runs through its eastern edge, providing recreational opportunities and historical significance. Major municipalities include Albion, the county seat; Medina, known for its charming downtown and historic sites; and Lyndonville, which offers a tight-knit community atmosphere. Culturally, Orleans County embraces its agricultural roots, hosting local farmers' markets and fairs that celebrate its rich farming heritage. The area also features various recreational activities, including hiking, fishing, and boating, while community events, such as the annual Orleans County Fair, highlight local crafts, food, and entertainment, fostering a strong sense of community pride.



**\$42
Million**
IN VISITOR
SPENDING IN
2023

12.0%
SPENDING
GROWTH
BETWEEN
2019-2023



Source: Tourism Economics

Image: Tow Path on Erie Canal, Medina, NY

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: Orleans County Tourism is the main promoter of tourism in the county, including information on local waterways, agrotourism, lodging, dining, and events.

Highlighting Waterways: There is a strong focus on the importance of Lake Ontario and the Erie Canal, showcasing their significance to the county's heritage and recreational opportunities.

Cultural and Historical Emphasis: The tourism site emphasizes the rich history of Orleans County, encouraging visitors to explore its historical landmarks and cultural heritage.

Agrotourism Promotion: The site promotes agrotourism, inviting visitors to experience local farms, markets, and agricultural events, thus connecting them with the county's farming traditions.

Fishing Opportunities: A dedicated fishing report section provides updates and insights into local fishing conditions, appealing to anglers and outdoor enthusiasts.

Event Listings: The website includes a calendar of events, highlighting local festivals, markets, and community activities that engage both residents and visitors.

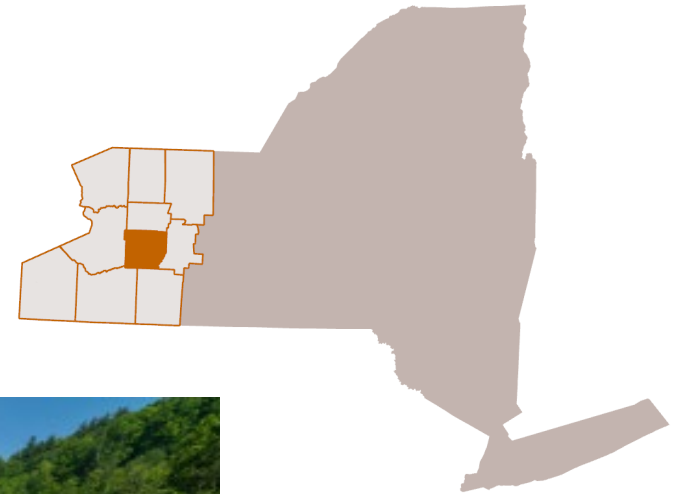
Comprehensive Dining and Lodging Options: Visitors can easily find recommendations for dining and lodging, ensuring a well-rounded experience during their stay in Orleans County.

COUNTY PROFILES

Wyoming County

POPULATION: 39,532

Dotted with small towns among its largely rural landscape, Wyoming County has a rich agricultural history and impressive natural beauty. Letchworth State Park forms the Eastern border of the county along the Genesee River. The county is also home to multiple lakes, such as Silver Lake, a small glacial lake which offers recreational opportunities like boating and fishing. Major municipalities include Warsaw, the county seat; Attica; and Perry, each contributing to the region's vibrant community life.



**\$71
Million**
IN VISITOR
SPENDING IN
2023

5.9%
SPENDING
GROWTH
BETWEEN
2019-2023



Image: Letchworth State Park

Source: Tourism Economics

COUNTY PROFILES

WHAT'S BEING PROMOTED?

TOP PROMOTED ACTIVITIES:



TOP PROMOTED ASSETS:



HOW'S IT BEING PROMOTED?



Key Promoter: The Go Wyoming County website serves as a dedicated platform for promoting tourism and local attractions in Wyoming County, NY. Its primary focus is to highlight the county's natural beauty, recreational opportunities, and cultural heritage, making it an appealing resource for both visitors and residents.

Highlighting Letchworth State Park: The website prominently focuses on Letchworth State Park as a major asset, stating, "Home to Letchworth State Park," which emphasizes its significance as a primary attraction.

Four-Season Destination: The site promotes the region as a four-season destination, showcasing a variety of activities and experiences available throughout the year, from hiking and camping in the warmer months to winter sports and scenic views in the colder months.

Rich Historical Context: The website features the area's connection to the Underground Railroad, highlighting its historical significance and promoting educational opportunities for visitors interested in this important aspect of American history.

Outdoor Recreation Opportunities: By emphasizing Letchworth State Park, the site underscores abundant outdoor recreation options, including hiking, biking, and nature exploration, appealing to adventure seekers and nature lovers alike.