

# CATTARAUGUS COUNTY: A DESTINATION ASSESSMENT OF SELECT COMMUNITIES



ZEITGEIST CONSULTING

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# INTRODUCTION

Zeitgeist Consulting's DMOproz, a firm with over 20 years experience working with destinations across North America, was engaged by Cattaraugus County to perform a Destination Assessment in order to identify opportunities to make the area a more compelling choice for consumers seeking a travel experience. Members of our Team (Boomer Male, GenX Mother and two Millennial travelers) toured the County over the Winter of 2018, recording their impressions of the destination from an outsider's viewpoint. To be sure, our destination reviewers could not stop at every single business, hotel or attraction in the destination.

Tasked with focusing the majority of its attention on the communities of Ashford, Carrollton, Cattaraugus, Delevan, Franklinville, Little Valley and Machias, the Team utilized travel and community information from the EnchantedMountains.com website, Wikipedia, TripAdvisor, Yelp and several other online and print resources (such as the Cattaraugus County Visitors Guide) to make their way through the destination as first time visitors.

Our Team views regions as destinations while communities are built for residents. With thoughtfulness, imagination and creativity, they can be both a place for a great Quality of Life for residents *and* an interesting destination for visitors. We make these observations and recommendations for enhancements to your community with the understanding that the visitor economy is the rising tide that raises all boats...if done selectively and with sensitivity to the culture of the region.

And, it's more than just the increased spending that visitors bring to a destination but the ability to generate non-resident taxes, increase job opportunities and pave the way for entrepreneurial business start-ups. A recent study by Longwoods International indicates that people who visit a community have, on average, a 10-15% higher opinion of that community as a potential future place to live and start a business. Thus, a tourism strategy works for a community on several levels.



# SITUATIONAL ANALYSIS

Cattaraugus County is located in Western New York, an hour south of the Buffalo-Niagara Metropolitan Area. Its population was listed as roughly 80,000 in the 2010 Census and is estimated to have decreased to 77,350 by 2017, more than 12,000 off its high of 85,700 in 1980.

The County set a record for Hotel Room Tax collections in 2017, with over 60% coming from the Village of Ellicottville. County officials believe that Room Tax collections in 2018 could increase by up to 25% as VRBO and AirBnB properties have just begun collecting the tax. The total collections for the County would likely top \$1 million, except the majority of hotels in Salamanca are tax exempt.

In 2018, the county's Visitor Economy is powered by three primary drivers: The charm, retail and culinary offerings of Ellicottville, underpinned by Holiday Valley (called by some "the Aspen of the East"), which creates a year-round stream of visitors, the Seneca Tribe's attractions in and around Salamanca and Allegany State Park (the largest in the State), named one of America's "Amazing Spots" in 2007. In addition, there is a significant concentration of Amish businesses in the Western portion of the county, a large enough concentration that an "Amish Trail" has been established. To date, however, other sectors of the county have yet to effectively capitalize on the traffic flowing to these tourism magnets.

With over 25 million consumers living within a 3 and a half hour drive, Cattaraugus County is certainly positioned to benefit from the growing Visitor Economy. And, as noted by the authors of the Town of Ashford Master Plan, one of the strongest growth industries in Cattaraugus County is the arts, entertainment and recreation cluster (i.e., performing arts, museums, parks and historical sites and amusement, gambling and recreation). This cluster employed approximately 1,930 people in 2014 and accounted for about 5% of the County's employment. From 2002 to 2014, employment in this industry reportedly grew roughly 365%, mostly in Ellicottville, Olean, and Salamanca. During the same time, the county's traditionally strong industries (Agriculture, Mining and Oil) declined between 15 and 20% in employment.



# CATTARAUGUS COUNTY

As previously noted, DMOproz' charge was to focus its attention and recommendations upon seven select communities in Cattaraugus County. However, with all due respect, we do not believe that we can accurately offer our analysis and recommendations in a vacuum. Thus, before stepping to our thoughts relative to the identified communities, we offer the following notes on our experience as we traveled throughout the county:

## THE PLANNING PROCESS

As the DMOproz Assessment Team prepared for its visit to Cattaraugus County in early 2018, members availed themselves of the EnchantedMountains.com website and requested the Visitors Guide along with additional collateral that might assist and inspire them. Of the two sources of information, the website was our "go-to" for information, as the internet is what today's travelers are primarily using to do their research before arriving in market.

The website, while data heavy with lists, fell short for our Team as members planned their separate set of destination experiences due to its lack of inspirational videos, photography and behind-the-scenes stories about what a visitor would find during their visit. We were very impressed with the sheer number the businesses that were listed, and offer praise to the staff that is keeping this updated. However the aesthetics of the site appear very old-school, leaving some to wonder if the information is outdated as the appearance. Because this is where the journey actually begins for the visitor, the perception of your destination brand is made in an instant when the consumer logs onto the website.

The Visitors Guide is similar to the website, in that it was another compilation of lists. That said, the map was exceptional from a directional point of view, but could be improved upon by highlighting key assets making it visually more appealing and easier to read.



## ARRIVAL & SIGNAGE

To say that members of our Assessment Team were lost most of the time would be an understatement. Outside of the occasional (and somewhat whimsical) multi-directional signs (as depicted on this page and the cover of this report), wayfinding signage in the county is sparse.

And, to those that would challenge that such signs are no longer needed in a world in which most phones are outfitted with wayfinding apps, GPS only enables a visitor to find a location they have already decided to visit. Effective wayfinding signage suggests additional experiences to a destination's visitors, extending length of stay and spending.

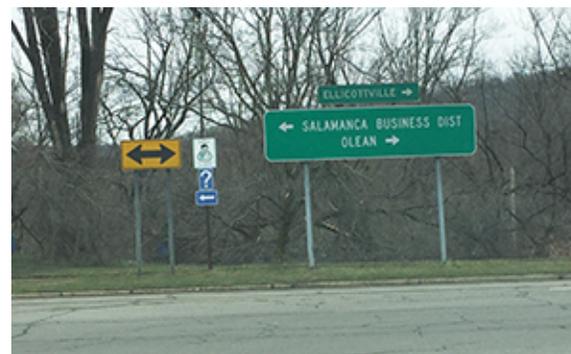
That said, signage for the Pat McGee Trail and the State Forest were both exceptionally well done. And, we were impressed with the entrance signage to several of the communities throughout the county. For those communities, the pride in their town is admirable and subtly communicates to visitors that they should consider stopping.

Those wishing to obtain a Visitors Guide or brochures on area attractions that chose to visit the local Destination Marketing Organizations are required to pass through a metal detector at the County building, something that travel bloggers such as SoloTravelGirl.com have pointed out, with a degree of head-scratching.

## LODGING

The majority of the lodging around the County in these 7 towns are B&B and/or camping in nature. The only full service hotels in Cattaraugus County appear to be at the Casino and the ski resorts. Limited service hotels range from brands such as Best Western to Wyndham and are concentrated in the southern part of the county near Ellicottville, Salamanca and Olean. No such options exist in the 7 towns we were tasked with exploring.

Camping, however, does exist across the county. From small, rustic spots to the "glamping" (luxury camping) of Bear Creek, this is the epitome of our perception of the Destination. Fresh air, real people, connected to the earth and naturally relaxed.



## **CULINARY**

Given the timing of our visit, many of the restaurants in the 7 communities we were asked to review were closed, making it difficult to find anything outside of fast food or pub food while we were in market.

## **NIGHTLIFE/ENTERTAINMENT**

The biggest entertainment driver in the county is definitely the Casino, booking touring acts such as 3 Doors Down & Collective Soul, Comedian Lisa Lampanelli, The O'Jays and more. Outside of that, any indication of nightlife other than in Ellicottville is few and far between.

## **ARTS, CULTURE & HERITAGE**

While it exists in every one of the towns, the interpretation and marketing of Arts, Culture and Heritage sites is practically non-existent in these 7 communities.

## **RETAIL**

Unfortunately, outside of Ellicottville's variety of fabulous little shoppes, there is not much in and around the towns selected for this study. And, in today's AmazonPrime world, it will be difficult for future retailers to keep their doors open unless they develop a unique shop that appeals to residents and visitors alike.

## **EVENTS/FESTIVALS**

The Calendar of Festivals and Events is significant and we commend the staff for maintaining a comprehensive list on the County Tourism website.



## ATTRACTIONS

**Allegany State Park** is one of the primary magnets for visitors to Cattaraugus County. The largest State Park in the State of New York, the Park borders the Allegheny National Forest in Pennsylvania. Boasting 18 hiking trails of various lengths and difficulties available for use year round (some are groomed for cross-country skiing in the winter) and are connected to the North Country Trail, which runs from New York State to North Dakota. Other features include lakes and streams, several observation towers, cabins and camping areas.

**The Seneca Allegany Resort & Casino** is an award-winning, full-service resort that attracts more than 3 million visitors each year. The facility offers world-class gaming and entertainment, fine and casual dining, a full-service spa and salon and 413 luxury hotel rooms. It has received a prestigious Four Diamond designation annually since 2009 from AAA and the Certificate of Excellence Award from TripAdvisor.

**Griffis Sculpture Park** features over 250 large scale sculptures located throughout an intricate trail system just off Rohr Road in East Otto. Open from May through October, the 450 acre Park beautifully connects art and the environment into an experience for visitors that could last all day. While snow depth prevented our Team from accessing parts of the Park, what we were able to see was sensational. Signage alerting motorists to this gem should be significantly more prevalent throughout this part of the county.

**The New York Amish Trail** that winds through the western side of the county is part of the largest Old-Order Amish community in the nation. As one of the pillars of the county's destination asset base, there is an opportunity to build upon Amish craftsmanship to create a broader "Maker's Economy." However, Destination Marketing and the visitors it draws need to be respectful of Old-Order Amish lifestyle. This sect is not interested in doing community tables or a general store as other denominations across the country have done.



**Alpacas, Elk and Buffalo** are abundant in Cattaraugus County. However, with few exceptions, they are generally hidden from highway view. That the Visitors Guide suggests 13 Alpaca sites in the county alone, this can and should be a more prominent feature in future marketing efforts.

## **OUTDOOR RECREATION**

Cattaraugus County is blessed with an abundance of assets that allow the outdoor enthusiast to experience a variety of adventures, from the adrenaline pumping downhill skiing to a more leisurely treasure hunt while geocaching. The availability of a plethora off outdoor pursuits, including biking (year round), fishing and hunting, equestrian, golfing, ATV/OHV, as well as all types of watersports, wintersports and a wide variety of motorsports make this area an ideal escape from the “rat race” of the big city.

Miles of trails exist here. Of special note are the Mountain bike trails at Holiday Valley (single track) and the Art Roscoe Ski Touring Area in the Allegany State Park. Other highlights, such as the Pat McGee Trail between Cattaraugus and Salamanca, are designed for more passive cycling and is shared with hikers and equestrian pursuits.

For those searching for a one-of-a-kind experience, the State Park is home to one of only a handful of swarms of Synchronous Fireflies in the world.

Even in the dead of winter, the beauty of this County in its untouched natural setting is breathtaking. With so many opportunities in virtually every category of outdoor recreation, this is the crux of where the biggest visitor growth is likely to be realized for Cattaraugus County.



# ASHFORD

As noted previously, effective directional signage in Cattaraugus County is hard to find...and locating the Town of Ashford was one of our Team's most difficult assignments. However, after reading the Town's draft Master Plan, that may not be such a bad thing...as protecting the environment appears to be a very high priority for the community, with very little stated interest of attracting visitors.

Indeed, the Master Plan encourages future development to be hidden from roadways to preserve scenic vistas. This is seen by many to be in response to the fear Ashford appears to be the next logical expansion of the Buffalo metro area. The disconnect here, however, is that most successful tourism businesses require roadside visibility.

Most of the confusion is that the Ashford area is variously referred to by residents with whom we spoke as West Valley and/or Ashford Junction. From a visitors perspective, there is no "there" there with conflicting signage and maps adding to the uncertainty. Only a resident would understand that Ashford is the greater township and West Valley is the town or "hamlet" within its borders.

Using the EnchantedMountains.com website as a tool to find something to do or explore here, one of the only assets listed for Ashford is Carson's Ashford House. Sadly, it was closed during our visit and our team was unable to experience it (but, it rates an impressive 4.5 star score on Yelp!). The retail that exists along Route 219 is not visitor-centric.

While we were unable to identify any paid lodging opportunities in the community (although we heard of plans to renovate and reopen the Ashford Hotel), the community's primary assets are the waterfalls and outdoor recreation trails. The calendar of events suggests a Music Festival occurs each August.



## ASHFORD RECOMMENDATIONS:

As the entrance to the County and gateway from Buffalo and beyond, welcome signage to the county would signal to visitors that they have entered a destination worth exploring. Additional signage that identifies where commerce or outdoor experiences can be enjoyed is critical to any further development of a Visitor Economy in and around Ashford. Indeed, the only sign we could find for Ashford was for the Highway Department.

In the absence of a defined tourist anchor upon which to build, Ashford can pretty much adopt any path it desires to grow its Visitor Economy. Plans for three boat launches should provide a welcome opportunity for outdoor recreationalists to access the River for fishing and boating pursuits.

That Carson's Ashford House is close to the access road to Griffis Sculpture Park, we wonder if this area around the intersection of Route 219 and Arenas Road could become a cluster of businesses that offer products and experiences connected to the arts and sculpture experience down the road. Carson's could serve as the culinary anchor for the Park and (as it is currently for sale) the new owners should capitalize on this proximity to one of the county's top attractions. Initial thoughts lead us to suggest a Potters' or Sculptors' collective. Both art forms are fun and interesting to watch and artists would have a direct opportunity to then sell their product to visitors.

Securing access to the railroad tracks running through the Township could also offer opportunities for visitors to park in the Township and train to Ellicottville to avoid the automotive congestion there on weekends...and to stage Polar Express-style excursions during the Holiday Season.



# CARROLLTON

As with several communities in Cattaraugus County, Carrollton is, as a destination, an enigma. The Hamlet of Carrollton is virtually unsigned and is completely residential in nature. A large portion of the western side of the Town of Carrollton is within the boundary of the Allegany State Park and a swath of land in the north central region of the Town is part of the Allegany Reservation of the Seneca Nation of Indians.

Not unlike Ashford, our Assessment Team was consistently lost when attempting to locate the destination's assets. The closest to a "town center" we could find was in the Hamlet of Limestone. Unfortunately, the primary businesses (a former restaurant and an antiques barn) at this intersection off Route 417 were out of business and in decay.

Besides the State Park, Mystic Water Resort, featuring log cabin rentals, camping and lake activities, was the lone identifiable Tourist attraction. Otherwise, our Team was only able to locate businesses selling gasoline, smoking materials and other typical convenience-store fare.



### **CARROLLTON RECOMMENDATIONS:**

We applaud Carrollton's Comprehensive Plan's stated Goal to "facilitate, support and create economic development in the Town which will positively affect the community without negatively affecting the rural environment." Nothing could be more attractive to today's traveling public than being able to experience the unique look, feel and culture of a destination. However, without additional asset development, Carrollton will be unable to share in the benefits of the Visitor Economy being enjoyed by Ellicottville and nearby Salamanca.

Thus, in keeping with the goal of maintaining the current character of the community, we suggest encouraging the private sector capitalization of its proximity to the Allegany State Park. With such Park assets as the extensive trail system and the access to water, we see the opportunity for outdoor recreation outfitters to set up shop near the Carrollton entrances to the Park. Visitors to a region rarely bring with them all of the equipment one needs for kayaking, ATV riding, snowmobiling, horseback riding and other activities requiring more than a pair of sneakers. Given the four-season nature of this exceptional asset, an outdoor recreation outfitter / guide business would draw visitors to Carrollton.

To further capitalize on the Park, the community needs another access point (possibly improving the seasonally available dirt road off Route 219). The community should also petition the State to allow ATVs in sections of the Park to remove this competitive disadvantage with the bordering National Forest in Pennsylvania.

One of the Town's stated Objectives is to encourage the teaching and manufacturing of crafts. Such businesses would dovetail nicely with the Park, as well, as those interested in the Maker's Economy tend to also enjoy outdoor pursuits and connecting with nature.

As the community looks to the future, it must also consider its past. If buildings such as the shuttered restaurant and antiques store cannot be rehabilitated and adapted to new uses, they should be demolished to enhance the aesthetics of the community. We understand that there has been an unrealized desire to see the Casey's building come down...and efforts should be redoubled to see that this occurs sooner than later. Every day that eyesore continues to stand is an forfeited opportunity to transform that high potential intersection into a set of attractions to encourage visitors to stop.

The view of North Main Street from 219 seems to make that strip of land prime for "makers/tasters events" (i.e. The Limestone Clambake, Makers Fair, etc) and a craft brewery. There are hundreds of thousands of potential visitors just across the border. If there's a reason to cross, they'll cross.

# CATTARAUGUS

Our team loved this little Main Street. At first glance, the Village of Cattaraugus appears to be the most architecturally ready community in our study to capitalize on the Visitor Economy. From the stone buildings that line the cobblestone streets to the presence of the American Museum of Cutlery, the community has "that look" of a quaint tourism town. Of course, upon further inspection, the majority of the buildings in and around the central core are vacant or occupied by non-visitor related enterprises.

The Historic Cattaraugus Corporation (a 501(c)(3) Foundation) was formed to preserve and revive the downtown cluster of 19 buildings on the National Register of Historic Places. The Bank of Cattaraugus currently controls half of these buildings. One of these structures is the 1890 Crawford House Hotel; another is the former Palace Theater.

Beautiful as it is, however, there are currently very few amenities that visitors would require to make the Village more than a quick stop on their way to somewhere else. No traditional lodging options presently exist...and there are only a few homes available on sharing economy sites such as Airbnb.

The American Museum of Cutlery celebrated the county's rich history in this industry...but it is the only true attraction in the Downtown. Unlike the County Historical Museum, this attraction maintains operating hours designed for visitors: Thursday through Sunday from 1-4pm.



## **CATTARAUGUS RECOMMENDATIONS:**

It seems that, with its existing architectural gems, this town could be ripe for an insurgence of working artisans / artists. But, Cattaraugus is the perfect chicken and egg scenario. Without a critical mass of businesses around it, would a hotel survive? Without a hotel, what entrepreneur would take a chance to be one of the first to set up shop?

Should the hotel come first, it will need to be designed as a “destination hotel;” an experience unto itself, requiring nothing more than itself to succeed. For this strategy to succeed, however, it will need to be a full-service hotel with exceptional cuisine and, possibly, a spa operation or other experiential offering to draw visitors for a complete experience.

If businesses come first, we wonder if the hotel transitions to apartments to house artists and artisans that create their work in the downtown storefronts, effectively creating an in-residence artists colony. With the American Cutlery Museum as “tip of the hat” to a time when Cattaraugus County was known for being a leader in the Maker Economy (before it was called that), to have a compact, walkable potpourri of storefronts behind which visitors can witness the creation of arts and products would be a magnet like few others in New York State.

What artists would pay for housing (hopefully, not much...which would be the lure) and what percentage of their sales would go toward the Corporation or the Bank would have to be negotiated. But, having a fully rented out Downtown of visitor-centric businesses would certainly encourage other entrepreneurs to set up shop in Cattaraugus...much more than the current inventory of tenants.

In the meantime, we wonder if the empty storefronts could be rented as “pop-up” stores or coffee shops, allowing entrepreneurs to launch their business without the challenge of a long-term lease. These businesses would have to agree to be prepared to vacate the property when a business is ready to sign a long-term lease. Having these entrepreneurs open for business and actively testing out new concepts would certainly make the Downtown look more appealing to potential investors than it is now. And, of course, if the “pop-up” business proves to be a success, the business owner would certainly be able to execute that long-term lease themselves. Another thought would be to open all of the storefronts for a month to antique dealers and promote an antique month. The next month could be devoted to galleries, etc. Such would be an interesting exercise to determine what types of businesses would be most appealing to visitors and suggest opportunities to entrepreneurs willing to invest.



During the Holiday season, a winter carnival weekend with Dickens Christmas characters and lights strung around town might attract attention. The closed storefronts could be opened to different restaurateurs who could do small pop up taste plates for a minimum price during such events.

As to the existing businesses (except for the Museum) that are not visitor-centric, community leaders should encourage those businesses to move “up” or “off” the Main Street. Successful Downtowns are so because they offer a compact walkable experience with lots of options. Town Hall offices, Libraries and the like should move to nearby side streets where parking is more plentiful to make way for an experience that is more like Ellicottville.

We were saddened to learn that the old school building has issues with asbestos and a lack of parking. If these issues can be remediated, this building could transition into an artists incubator to solidify the magnetism of Cattaraugus as a visitor destination.

# DELEVAN

On first glance, the compact core of Delevan along Main Street appears as if it could support a Visitor-centric economy (indeed, we understand it once did). Unfortunately, the Delevan Plaza has transitioned into a strip mall of service-sector businesses. Across the street, the Wholesale Outlet is just about the only business we saw that might still appeal to out-of-region visitors. Some residents with whom we spoke called Delevan the “forgotten town.”

With only a couple hundred Drive-In Movie Theaters left in America, we were heartened to see that Delevan’s has reopened, providing residents and visitors an opportunity to experience this slice of Americana.

Hardy’s Tavern was one of the few places to grab a bite to eat (and not listed on the website). However, in a destination that focuses on family and outdoor recreation, it is fairly unlikely that anyone with kids would choose to stop here. Sahr’s is listed as an option online, but we found it closed with signage that caused us to assume it to be out of business (it isn’t).

Freedom Motorsports Park is probably the biggest driver of visitors in this area with events every weekend this summer. As previously indicated, signage to this asset was almost invisible.

Gooseneck Hill Waterfowl Sanctuary’s official address is Delevan, but located between Delevan, Machias and West Valley. Like many attractions, this one was also closed during our visit.



## DELEVAN RECOMMENDATIONS:

Delevan's future as a participant in the Visitor Economy is a paradox. While its downtown is quaint and walkable, the vast majority of the businesses there are decidedly non-tourist enterprises. Far be it for us to suggest that these businesses pack up and move elsewhere, as they apparently have found a prosperous home where they are.

But, that is what it will take for Delevan to attract visitors to its core. Until at least half of the storefronts are filled with visitor experience businesses (unique retail, culinary, galleries, etc.), the community will be unable to substantially benefit from the Visitor Economy enjoyed in other parts of the county.

We see the Reed Building as possibly having the most potential to restart the Visitor Economy in Delevan. With its second floor theatre, the facility could be an incubator for an arts culture in the community.



# FRANKLINVILLE

The majority of the buildings in the downtown core date back to the late 19th Century. Although the Park Square Historic District “defines” Franklinville socially and culturally, the destination also boasts several campgrounds. And, the community hosts the annual Western New York Maple Festival each Spring.

Our Assessment Team was immediately taken by the Park Square Historic District. With a layout and architecture reminiscent of the quaint small towns of mid-20th Century, the Square had an almost “*Ground Hog’s Day*” feel. Unfortunately, the majority of the storefronts are either vacant or being used by business ventures that will not attract or serve visitors (e.g., insurance offices and a bank). For Franklinville to compete for the travel consumer that is attracted to walkable small town charm, retail and culinary, this reality will need to change.

The Woods at Bear Creek markets itself as a “Glamping Resort” with ziplines, a lake, ATV trails, restaurant and great hall for hosting groups, reunions, weddings and dinners. Nearby Triple R Campground offers a more traditional experience. In all, we counted 5 camping options in and around the Town.

Skateland is one of the only businesses in our target set of communities that promises a family attraction that isn’t a natural asset. While a little “long in the tooth,” it provides activities for kids.

The Miner’s Cabin on Pine Street is a beautifully restored 1890’s house managed by the Issue Valley Historical Society. That it is only open sporadically or by appointment renders this asset unmarketable to visitors. We were told that the Society also owns three properties that have a history of being part of the Civil War-era Underground Railroad. Until these are open and packaged to attract visitors, they will remain forfeited opportunities.



## FRANKLINVILLE RECOMMENDATIONS:

While several of the communities selected for this assessment lack an existing persona, Franklinville's is crystal clear: Historic. The Park Square exudes a look of a simpler time; when small town America thrived and was a central component of everyday life.

In 2000, a primary goal of the Village Comprehensive Plan was to "highlight and enhance the significant historic resources of the Town and Village." The Plan went on to say that several improvements to the downtown "have not been respectful or sympathetic to the original design." We would agree...and encourage the Village to focus its efforts on restoring the Park Square District. From a strong and attractive central core, the rest of the community will rise.

Outside of aesthetic upgrades, the key to this redevelopment plan will be to fill the storefronts with reasons for those from outside the region to visit, as residents have clearly lost a need for the Square to serve their needs. This will mean unique retail and businesses that cater to the "Tasting Economy" (culinary, craft drinks, etc.). Whether this is an outright purchase of buildings that presently do not house such businesses or incentivizing current owners to become more intentional with their tenant businesses. As we suggested for Cattaraugus, making storefronts available for "pop-up" businesses could offer under-capitalized entrepreneurs the opportunity to test their concepts before going all-in on a successful venture.

Taking the heritage angle a step further, Franklinville has some other opportunities before it. The presence of Ontario Knife Company (OKC) may present some interesting options, if they are able to offer tours of their operation. Today's traveler is increasingly interested in how things are made (tours at some John Deere facilities are often sold out weeks in advance). If insurance considerations can be mitigated, such tours will add a reason for people to visit Franklinville and build brand loyalists for OKC as well as revenue through gift shop purchases.



Indeed, Franklinville's historic place as a center of cutlery could be further enhanced by developing a storefront that sells knives (and all things sharp). Whether it is an outlet style (selling seconds) or a "superstore" concept featuring cutlery from throughout the region, an entrepreneur could both build a unique visitor-centric business as well as reinforce one of the community's brand identities.

That there are a number of camping sites in and around Franklinville, the opportunity to support businesses that cater to campers is certainly a possibility. From outdoor gear to catering, this could be an interesting business model for outdoor-centric entrepreneurs. Indeed, area land owners might consider building upon the camping magnet that already exists by signing on with Tentrr.com, an online platform that work like Airbnb to supply visitors with unique overnight accommodations.

We are also intrigued by the Historical Society's Underground Railroad assets. While we didn't see them (and understand that they may not be currently open to the public), this piece of American History has rarely been well actualized. In keeping with a heritage theme for the community, these buildings could be, if well articulated, another magnet for visitors. The Stagecoach Inn (reportedly for sale) could be the opportunity to build upon this part of the region's heritage.



# LITTLE VALLEY

Home to the Cattaraugus County Fairgrounds, Little Valley serves as the County Seat. Outside of a handful of restaurants scattered through the central business district, there is very little beyond the Fairgrounds to attract or keep visitors.

That said, our Team was impressed with the size and finish of the Fairgrounds property. From the Grandstands and track to the recently updated barns, the facility showed well even in the dead of Winter. The Corporate Building is also available for small trade shows, local events and weddings. Outside of the annual Demolition Derby and Tractor Pull, we understand that regular stock car racing here has been discontinued.

The Hughes Hotel (which is no longer a lodging property) features a great menu of pub fare and often hosts music on the weekends. And, the Ellicottville Brewing Company is expected to open a satellite operation just outside of the Downtown by the end of Summer 2018.



## **LITTLE VALLEY RECOMMENDATIONS:**

The primary focus for Little Valley should be to continue to maximize the County Fairgrounds. That the 2018 Fair has already sold out one of its headliner concerts a full two months out indicates to us that the complex has the opportunity to host more events than it currently does.

Unfortunately, we heard frustration from many in our June Listening Sessions that the Fair Board appears increasingly less inclined to host events other than the Fair itself. Community and County leaders need to schedule conversations with members of the Fair Board to investigate whether this is, indeed, the case...and, if so, to examine options that would produce a win-win scenario for all sides. The Fairgrounds' facilities are perfect for live entertainment and equestrian events, especially given the proximity of nearby ranches and riding organizations. There could also be culinary tasting events and craft beverage events. With the county's plethora of Alpaca farms, Alpaca events here would be the perfect clearinghouse for area farms.

The soon-to-open Ellicottville Brewing Company facility will be a distinct shot in the arm for Little Valley and should attract other entrepreneurs that want to take advantage of the new traffic that will be drawn to town. We recommend targeting the addition of a cidery/tasting room or distillery/tasting room (or both) as fast as possible to leverage the triangulation that will happen from the new brewery location. Once a community has one of each, it becomes a destination.

The compact few blocks that contain the community's business district have the opportunity to be more attractive to visitors than they currently are. We were especially intrigued by the building across from the Hughes Hotel that could actually become a lodging option...but successful only if there were a critical mass of visitor-centric businesses within walking distance.



# MACHIAS

Located in the Northeastern portion of the County, Machias boasts a population of roughly 2,000 people. Communities within the Township also include Lime Lake and a number of other hamlets. The Town is primarily identified as the “Five Corners” on which the majority of the business district is located. The community is also home to the Cattaraugus Christian Camp and the County Historical Museum.

The Five Corners Business District is currently anchored by Machias Outdoors. In a world increasingly populated by Bass Pro Shops and Cabela’s, this sporting goods store (with an archery range on the second floor) was an exciting find, a sentiment anchored by their 5-star rankings on Social Media platforms like Facebook. Further embellishment of the theme could include 3D shoots, skeet station shoots, “turkey shoot” nights and events.

The County Historical Museum, co-located in the historic Stone House with the County Mental Health Department, operates on a schedule that is designed more for residents (Monday through Thursday, 9-4) than potential visitors (one Saturday a month, and only seasonally). This is not a criticism, as Museums do not need to appeal to visitors if their primary mission is directed to residents. However, as this analysis is designed to suggest ways to increase visitation throughout the county, more visitor-friendly hours would certainly be a suggestion. That said, the very size of the Museum conspires against the facility being a bonafide attraction for the destination.

The County Historical Museum is also hampered by less than optimum signage. While we understand the economics and maximization of space attained by sharing space with the County Mental Health Department, the permanent signage along Route 16 gives no indication that the Museum can be found at the rear of the building.

Lime Lake is essentially a private access attraction, however, the restaurants/bars and businesses around it benefit from its existence.



**MACHIAS RECOMMENDATIONS:**

With one of the region’s only retail stores with quality brands, we believe Machias should expand upon that success by positioning itself as the “outdoor recreation” destination in the county. Just as Ellicottville is known for unique retail and culinary experiences and Franklinville could be known for heritage, Machias could be where outdoor recreationalists congregate. Businesses that could succeed here are outfitters, health and nutrition outlets and outdoor crafts and art stores. Indeed, engaging the Lime Lake Sportsman’s Club, featuring space in which visitors (and locals) could shoot, would be a logical extension off the community’s primary attraction.



## **OTHER DESTINATION ASSETS**

During the Community Visioning Workshops held in June 2018, additional marketable destination assets were identified by County Stakeholders:

- Fresh Air
- Rural Culture
- Railroad
- Theatre
- History
- Ghosts and Haunted Houses
- Bicentennial Opportunities
- Architecture
- Steelhead Run
- The Allegheny watershed
- Universities & Colleges
- Festivals
- Hunting
- Agriculture / Dairy
- Fall colors

# COUNTYWIDE THOUGHTS & RECOMMENDATIONS

Beyond the seven selected communities we were asked to assess, we offer here our thoughts on the destination as a whole:

**DESTINATION STRENGTHS.** It's where the 4-lane highway ends. Miles upon miles of twisty-turny roads with breathtaking vistas around each corner. Motoring, motorcycling, bicycling...this should be an easy sell to those who love to drive.

Even more attractive to a world that is increasingly stressed out, is the pace of life in Cattaraugus County. The opportunity to unwind and luxuriate in the peacefulness of the mountains is the perfect antidote to the pressures of an out-of-control life. As one Listening Session participant suggested, Cattaraugus County is “the antidote for urban life” and cure for “Nature Deficit Disorder.” There is a powerful message here, especially for those in the Buffalo-Niagara metro.

The rich Agricultural heritage in Cattaraugus deserves some entrepreneurial thought in developing new experiences for urban dwellers. Our team was startled at how few Agri-Tourism experiences existed (outside of Alpaca farms). From Fall Festivals to celebrate the harvest to Dinners on the Farm, the opportunities to provide one-of-a-kind adventures to those that have never gotten closer to farming than shopping at a grocery store. This could be an opportunity to provide increased revenue for farms in transition by reconnecting consumers with nature through camping, corn mazes, petting zoos, hay rides and working farms.

And, the rural nature of the majority of the county provides another asset that most regions lack...dark skies, perfect for viewing stars, the Northern Lights and other astronomy related activities. Visitors flock to Potter County PA for its dark skies which are famous for great views of the Milky Way, planets and hard-to-see astronomical objects and phenomena. We would expect the skies in some parts of Cattaraugus County to be similarly as dark...and just as inviting for astronomers of all ages.



**DESTINATION OPPORTUNITIES.** Beyond maximizing existing assets, we believe Cattaraugus County would benefit from adding the following:

**Craft Beverage Experiences:** These types of locations are hot. They draw people across borders. Many begin to host a regular series of events when they are up and running, as well. For example, Cider Creek Hard Cider in Steuben County is essentially in the middle of nowhere and consistently draws crowds. Frequent events there are a catalyst for visitation.

Recent changes to New York State laws now allow breweries, cideries, distilleries, and (for a while now) wineries to make and sell their product at their manufacturing location as well as one satellite location. This creates significant opportunities for smaller towns. Plus, the more that are built, the more people will recognize the county as a trail or craft beverage region...and a destination.

**ATV/Dirt Bike riding opportunities:** It is getting increasingly difficult to find quality and legal places to ride this type of equipment. Destinations that put in track, trails and learn to ride opportunities can attract this type of tourism.

**Music Festivals/Events:** Event based tourism is huge across New York. Tourism increasingly must sell against indifference. In a world with on-demand streaming entertainment, we need events to move today's consumer out the door. Large tracts of land can be great for hosting music festivals that work even better in very rural settings.

**Glamping and Niche Camping Experiences:** Attracting additional full scale campgrounds/camping resorts to the destination would be wonderful. However, it is often easier for someone to put up 10 glamping tents or pods and offer a unique experience. As noted previously, TentRR is a trend in the eastern counties of the State that may be expanding westward. The concept is simply an Airbnb type model, but for prebuilt glamping sites on private land. The company comes and positions a platform with a tent, fire ring, a few Adirondack Chairs and a composting toilet on the corner of a hay field or some other easy to access location. There is no running water or electricity. These are rural locations that are still reachable by car. Then, those sites are listed on a website and app and the landowner gets 40-50% of the overnight rate. If glamping or niche camping experiences are located with some additional recreation options, they would become true destinations. Think of renting mountain bikes, kayaks or having a Tiki type bar centric to the experience. The more experience the better.

**Experiential Inns:** Think of inns or bed and breakfast type set ups where one can bike, snowmobile, horseback ride or ATV right from the property (or on the property). There was an Inn in Chenango County that served breakfast and dinner and guests could snowmobile or ride horseback right out the back door...and their barn was set up to store both during the visitor's stay.

**Mountain Biking:** Large tracts of land that are developed with single track are a magnet. Include "learn to ride" programs and rental fleets, and it's even better. Again, think of how a lodging component could be added to make it a full experience.

To be sure, some of these experiences already exist in Cattaraugus County. We are not suggesting that the County encourage competition for their existing entrepreneurs. However, it is not a bad idea to have a lot of something. One place to pick blueberries is nice. 15 places to pick blueberries becomes a "blueberry picking region."

**DIRECTIONAL SIGNAGE.** The biggest challenge facing the County in its interest in capitalizing on the Visitor Economy is that wayfinding is next to impossible through much of the destination. While the easy availability of GPS may cause some to believe way finding signage to be passe, such technology only works when one has the intended address of the attraction. Where wayfinding signage propels a destination forward is in its ability to suggest experiences in addition to the intended attraction. Indeed, wayfinding signage reinforces in a visitor's mind that there is lots to do in a destination.

From providing directions between communities to suggesting additional experiences, wayfinding signage is one of the least expensive and most impactful strategies the County and its municipalities can execute to jump start tourism and economic development.

**DESTINATION WEBSITE & ONLINE PRESENCE.** The County's face to the world is through its website (and, tangentially, through its Social Media platforms). The EnchantedMountains.com site is at once sensationally rich in content and old-school homely at the same time. With a last-century look and feel that is not effectively optimized for mobile or tablet viewing, a consumer's first impression of the destination is certainly not that of a compelling choice for a visit.

The site needs an aesthetic overhaul to both feature images and video of the sensational beauty of the destination as well as optimize the site for small screen viewing (over half of all destination searches begin on a mobile device). In addition, the design should include information and inspiration for group visits (reunions, weddings, etc.). Examples of the new era of Destination websites include TravelMarquetteMichigan.com and TravelWV.com.

While that upgrade is being made, a re-evaluation of the image and video libraries should be undertaken. Assets within this link are completely outdated...and these images and videos should be prominent throughout the site and not a separate navigation choice.

We commend the Tourism Office for Enchanted Mountain's Facebook page, as it is regularly filled with posts of current events. However, there is very little engagement with visitors. Given the limited staff resources available, we would suggest outsourcing this function to a professional firm (such as TwoSixDigital).

**VISITORS GUIDE.** As with the website, our Team was very impressed with the content and organization of the Cattaraugus County Visitors Guide. Our only suggestions would be to be clearer on hours of operation (or create a seasonal insert/section) for attractions and businesses as our Team repeatedly drove significant miles only to find an attraction listed in the Guide was closed.

**WORKFORCE DEVELOPMENT.** During our Listening Sessions, we heard several participants relate their concerns regarding the declining full-time population in Cattaraugus County. Local businesses might want to consider combining financial muscle to develop a campaign similar to the one recently launched by the South Shore Convention & Visitors Authority called "The Grass in Greener" ([MoveToIndiana.com](http://MoveToIndiana.com)).

In addition, some consideration should be given to exhibiting a travel and outdoor shows with an additional message of entrepreneurial opportunities in Cattaraugus County; that those wanting to start businesses offering ATV trails, outfitting and guiding outdoor recreationalists and other related experiences would have such a chance just outside the Buffalo-Niagara metro.

# CONCLUSION

Many Destination Assessments are essentially asking “how is our ballgame?” because the destination wants to win more games. The situation we find ourselves in with areas of Cattaraugus County is that there is often no “Baseball diamond” upon which to play.

It is the proverbial chicken and egg conundrum. The majority of the communities upon which we were asked to focus the lion’s share of our attention have precious little to attract most visitors. To be sure, each offers niche market opportunities (for example, heritage in Franklinville and architecture in Cattaraugus). And, the entrepreneurs that elect to locate in these communities need the added promotion that a professional Destination Marketing agency (such as the Cattaraugus County Tourism Office) can provide.



Unfortunately, none of these communities boasts a hotel. And, as hotel occupancy tax is often viewed by local government as the only way to fund Destination Marketing, it is difficult for many community leaders to see past this apparent disconnect.

However, as recent research has clearly indicated, Destination Marketing and first-time visitation have a marked influence on building interest in both living and starting a business in a community. Indeed, Destination Marketing has been referred to as the “First Date for Economic Development.” And, as Economic Development is squarely on the minds of most community leaders in Cattaraugus County, it really shouldn’t matter from what revenue stream such efforts are powered. If it’s important for the future health and viability of a community, then it should be important enough to merit an investment of General Fund revenue.

Since the 1960s, U.S. Tourism experienced the rise of the “Plastic Economy,” otherwise referred to as the McDonaldization of America. The more chain restaurants the better. The more hotels exactly like one another the better. But, somewhere after the recovery of the economic crash of 2008 we began to see signs that a new reality was emerging with younger travelers. Authenticity and experiences are now preferred to chains and “plastic” experiences.

During our time with community stakeholders, we felt a sense of hopelessness borne by an uncertainty of where to start. By taking a lead in this assessment project, Cattaraugus County can be the catalyst that gives its communities, residents and entrepreneurs the belief that they can succeed at resurrecting the more rural parts of the region. Believe that small tourism growth is possible...and it ignites like wildfire. If everyone starts to do something small, it won't be long before business are passed to the kids. It all starts with belief.

After all, Ellicottville once struggled to keep its Downtown vital in the summer months. But, by identifying their strengths and doubling down on becoming a magnet for tourism, it has become an example for other communities throughout the county.

Our thanks to Crystal Abers, Kate O'Stricker and Jacquie Gardner of the Cattaraugus County Office of Economic Development & Tourism for their assistance in organizing our visits and the Community Visioning Sessions. We hope our analysis and recommendations serve to inspire the people of the region to continue to search for ways to enhance Quality of Life through developing experiences that expands the Visitor Economy throughout the county.

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