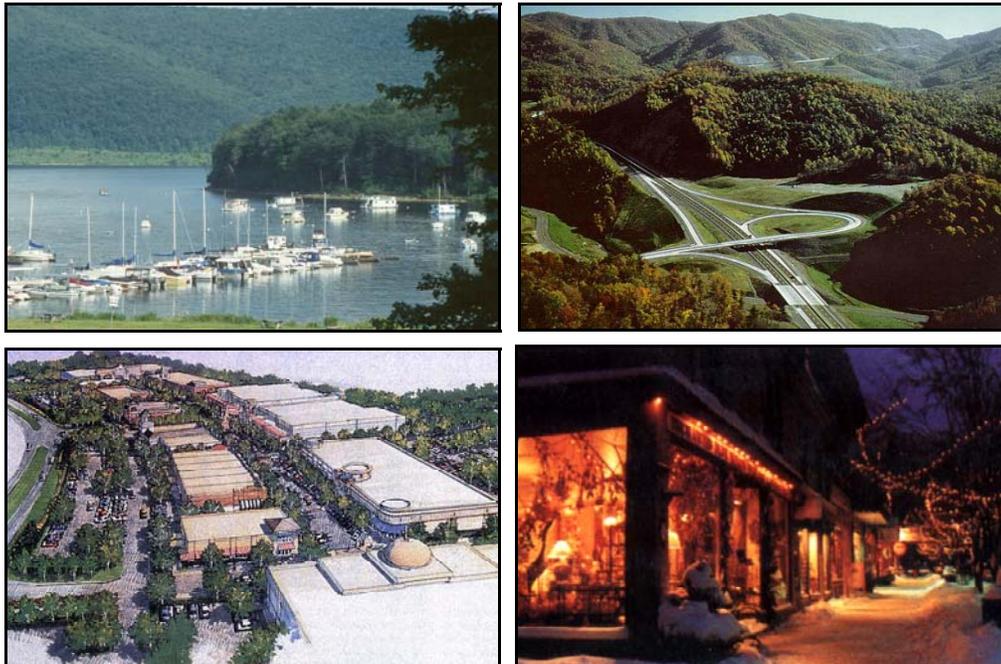


# **ECONOMIC AND MARKET ANALYSIS FOR COMMUNITIES IN THE PERIMETER OF ALLEGANY STATE PARK**

**VOLUME 6**

**A GUIDEBOOK PUBLISHED FOR CATTARAUGUS COUNTY'S  
SMART DEVELOPMENT FOR QUALITY COMMUNITIES SERIES**



**PREPARED FOR**

**CATTARAUGUS COUNTY LEGISLATURE'S  
ALLEGANY STATE PARK PERIMETER STUDY**

**PREPARED BY**

**CATTARAUGUS COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT, PLANNING, AND TOURISM**

**and**

**THE SARATOGA ASSOCIATES**



**LANDSCAPE ARCHITECTS, ARCHITECTS, ENGINEERS, AND PLANNERS, P.C.**

**JULY 31, 2001**  
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COUNTY LEGISLATURE

GERARD J. FITZPATRICK  
*Chairman*

303 Court Street  
Little Valley, New York 14755

July 31, 2001

Members, Cattaraugus County Legislature  
Economic Development and Planning Agencies  
Municipalities, Businesses and Citizens

Dear Colleagues:

We are fortunate to have Allegany State Park in Cattaraugus County. The 65,000 acres inside the park present nature at its best, attracting an average of 1.5 million visitors every year. The perimeter zone around the park is even larger, offering a wide variety of recreational opportunities, business activities, and tourist attractions.

This study by Cattaraugus County, called Cattaraugus County Allegany State Park Perimeter Study (2001), received funding support from Senator Patricia McGee. This market analysis by The Saratoga Associates looks at potentials for economic growth around the perimeter of Allegany State Park, including private investments and public improvements. This study includes:

- Potential enterprises that could be supported by future traffic levels from improvements made to both I-86 and Route 219, by visitation rates to the Allegany State Park, and estimates on new jobs that could be created by such enterprises.
- Potential site locations that would be required to support such enterprises, and that, while promoting industrial and trucking developments, would attract them away from tourist-sensitive areas in the perimeter zone around the park.

We want our county to grow and prosper, while protecting your community's character, environment, and beauty. This report informs us on ways to accomplish this new prosperity. For more information on Cattaraugus County, go to our Home Page at [www.co.cattaraugus.ny.us](http://www.co.cattaraugus.ny.us).

Sincerely,

A handwritten signature in black ink, appearing to read "Gerard J. Fitzpatrick".

Gerard J. Fitzpatrick  
Chairman

GJF:THM:mep  
Enclosure

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\*\*Professional support staff to the Allegany State Park Perimeter Study.

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## **A. INTRODUCTION**

The purpose of the Allegany State Park Perimeter Study is the identification of a variety of opportunities generated by the newly emerging regional transportation crossroads of I-86 and Route 219, at the edge of the Park. These opportunities include industrial, commercial, and tourism-related development. The overall goal of the Study is to promote economic growth around the edge of the Park, while keeping traditional industrial development separate from tourist-sensitive settings and attractions, and to maximize the economic benefits of growth in the Perimeter Zone. (See Map 1, Locator Map)

As a means of encouraging and directing desirable growth in this emerging crossroads, Cattaraugus County has retained The Saratoga Associates (TSA) to identify new opportunities for economic investment and tourism. The Allegany State Park Perimeter Study will identify means of directing desirable growth to strategic perimeter locations in a manner appropriate to the character of the particular Gateway Communities.

This report represents the second step in the Allegany State Park Perimeter Study. It outlines the industrial, commercial and tourism-based potential in the Perimeter Zone of the Park, providing an inventory of existing manufacturing, commercial and tourism assets in the Park and the Perimeter Zone, and evaluating the needs and opportunities that they create. The analysis was based on State and Federal projections of highway traffic, economic development and cross-sector increases in employment opportunities. In addition to recommending specific economic activities, appropriate sites are identified within the Perimeter Zone for commercial, industrial and tourism-related development, respectively.

As discussed in Task 1, an Analysis of Similar Gateway Planning Initiatives, rapid or unplanned development can result in faceless and unattractive commercial and residential development, including strip malls, sign proliferation and franchise architecture. Other potential problems include traffic congestion, increasingly automobile-dependent communities and overburdened infrastructure. Unguided development can only serve to diminish the natural and recreational experience, both outside and inside the park. Since the rural atmosphere and scenic environment are the primary stimulus of the regional economy, to allow their degeneration would be to allow the degeneration of Cattaraugus County's cherished quality of life.

# Allegany State Park Perimeter Study

## Locator Map

### MAP I

-  Southern Tier Expressway
-  State Routes
-  U.S. Routes
-  Local & County Roads
-  U.S. Route 219 Freeway Alternative
-  Proposed Interchanges
-  Seneca Nation of Indians Reservation

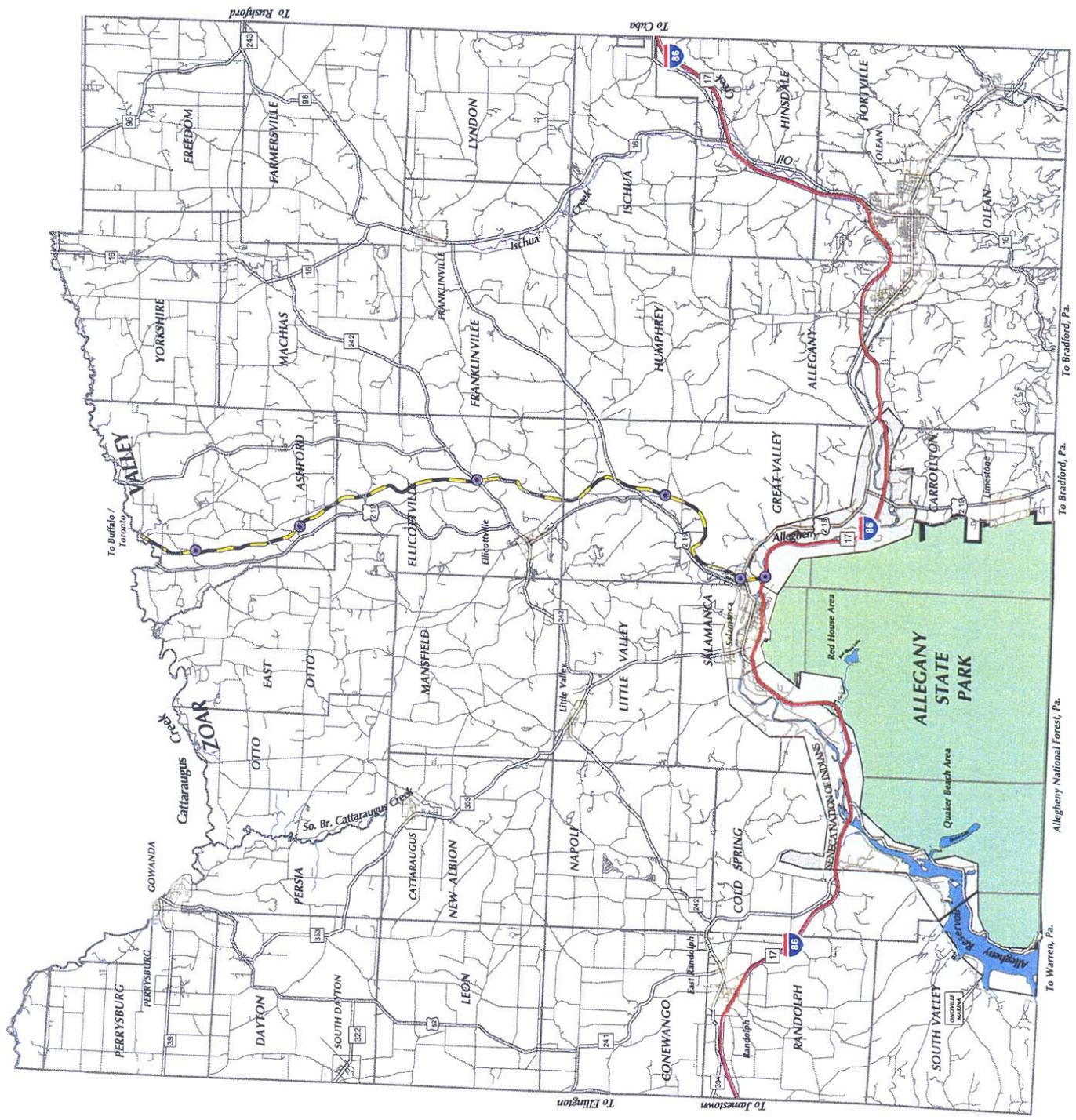


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**THE SARATOGA ASSOCIATES**  
 LANDSCAPE ARCHITECTS, ARCHITECTS, ENGINEERS AND PLANNERS, P.C.  
 SARATOGA SPRINGS, NEW YORK CITY AND BOSTON

# Allegany State Park Perimeter Study

## Cattaraugus County



An emphasis has been placed on the development of both tourism and industry in the Region. The tourism sector would be associated with the recreational, scenic, environmental and cultural attractions of Allegany State Park, since it has the potential to provide an immediate economic asset to communities located around the perimeter of the Park. Cattaraugus County is extremely fortunate in that it boasts a multitude of opportunities for the development of tourism experiences, including natural scenic beauty, recreational amenities, retail facilities and historical/cultural interests. Industrial development will be located on brown-field sites, that is, existing industrial sites, which can provide an important economic diversity, without compromising the natural environment that is the base of tourism.

Central to the recommendations made is the fact that the natural environment must be nurtured and protected for the good of all. The same recreational and environmental qualities that draw visitors to the region also contribute to a high quality of life for residents. The key word in all future development must be sustainability. Growth must be encouraged while urban sprawl is steadfastly avoided, by means of a stated policy for balanced growth and economic diversity.<sup>1</sup> While the market potential of the area's scenic amenities should be capitalized upon, such development must occur without compromising the integrity of the natural environment.

## **B. PROJECT ORIENTATION**

This section of the Study comprises an outline discussion of the Zone of Influence, the Perimeter Zone and the Gateway Communities. The purpose of this discussion is to familiarize the reader with the definitions and the scope of the Study, and to outline the underlying logic regarding the Zone of Influence, the Perimeter Zone and the Gateway Community selections. It will also serve to explain the rationale behind the various recommendations for specific Community and Economic Developments. (See Map 2 – Zone of Influence)

### **1. Zone of Influence**

The Zone of Influence refers to an area of land stretching from Cattaraugus County’s northern border to Allegany State Park, along Route 219. It includes the Route 219 Study Corridor, the I-86 Corridor to Olean, Allegheny Reservoir, NYS Route 394, Randolph, Amish Country, and NYS Route 353, Little Valley, Cattaraugus. The Zone of Influence is primarily an economic entity. It is a geographic and economic ‘zone’, which influences Cattaraugus County by virtue of being the transportation corridor that links the surrounding major urban settlements to Allegany State Park. It was devised with a regional rather than a local agenda, with the goal of focusing economic growth within a defined area. As discussed in greater detail both in the **Introduction** and in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects**, this development should occur in a manner, which maximizes economic opportunity, without diminishing the natural environment.

A number of urban centers are located within the Zone of Influence, including Ellicottville, Olean, Randolph and East Randolph.

# Zones of Influence

MAP 2

-  GATEWAYS IN NYS
-  ZONE OF INFLUENCE
-  U.S. ROUTE 219 FREEWAY ALTERNATE
-  PROPOSED INTERCHANGE
-  SOUTHERN TIER EXPRESSWAY
-  U.S. HIGHWAYS
-  STATE HIGHWAYS

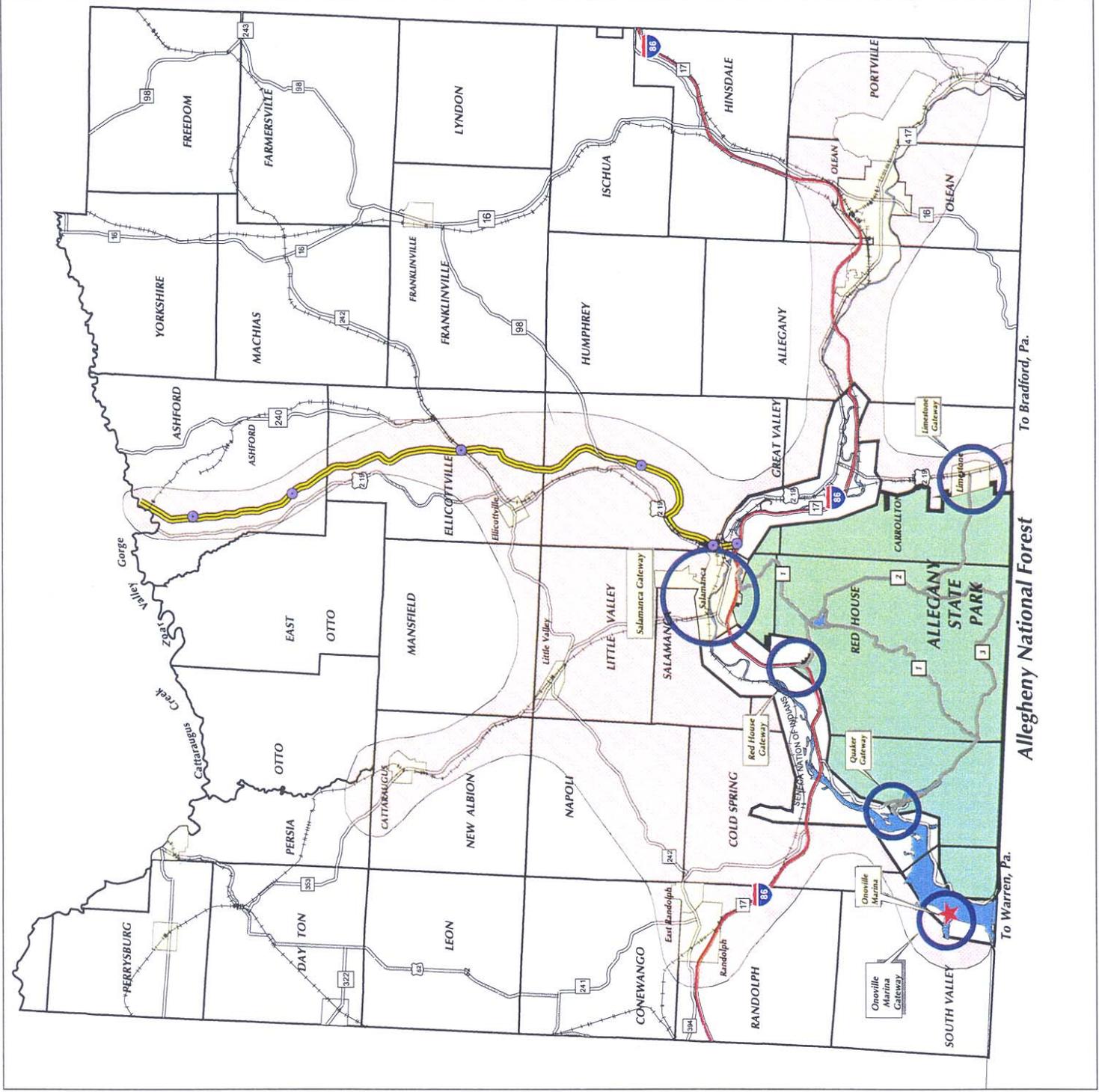


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**Allegheny State Park  
Perimeter Study**

**Cattaraugus County**



To Bradford, Pa.

Allegheny National Forest

To Warren, Pa.

The Village of Ellicottville, located to the north of Allegany State Park, has developed into a regionally important ski destination. Holiday Valley and Holimont ski areas offer some of the best ski terrain in Western New York. The Cattaraugus County Department of Economic Development, Planning and Tourism estimates that Ellicottville hosts over 600,000 visitors during the ski season alone. Capitalizing on this winter tourism opportunity, downtown Ellicottville has developed into a resort destination, with a quaint, yet vital, downtown comprising upscale accommodations, bars, restaurants, boutiques, galleries and niche retail establishments. It is unique in the western Southern Tier region. Within the village and adjacent to the ski areas, residential properties have been developed as second homes, vacation rentals, and bed and breakfasts. A transportation shuttle is provided for ease of transit to more remote locations. Over the last several years, Ellicottville has been focusing on the creation of four-season resort opportunities. The Holiday Valley resort has developed an 18-hole golf course and maintains year-round conference center facilities. The community has developed a multi-seasonal schedule of festivals and events to encourage year-round tourism.

Olean is the largest retail center in the region, with a wide variety of shopping facilities. It is also the location of the majority of the County's manufacturing jobs. Approximately 40% of the County's population resides in Olean and Allegany. It is home to the Olean Business Institute, a fully accredited business college offering practical instruction in computer technology, accounting, medical assistance, business management and paralegal studies – all extremely important in expanding the County's skilled labor force. Olean is also a medical services hub, supporting a large general hospital and medical group – the first multi-specialty group in the County. Medical supply facilities have opened in the vicinity, to meet the material demands of this growing regional medical services center.<sup>2</sup>

The town of Randolph is located in the southwestern corner of the Zone of Influence, and is the urban center for the Amish Community – the largest settlement of its kind in New York State. Visitors can enjoy the many summer festivals, shop at craft shops offering handmade Amish quilts, handcrafted furniture, toys, and antiques, and gain a unique perspective on Amish culture.

Also included in the Zone of Influence are a number of existing and proposed business and industrial parks, including Railyard Industrial Park in Salamanca, Ellicottville Scenic View Business Park, Ellicottville Tourism, Cultural and Performing Arts Center, Ashford Nuclear Educational Center and Business Park, and the Airport Business Center. Each of the existing and proposed industrial and

business parks is discussed in greater detail in **Section D, Part 1, d, Proposed Industrial and Business Demonstration Projects**. It is important to note, however, that the proposed projects are concepts at this point, and are subject to change both in terms of their scope and their location.

The Zone of Influence represents the economic hinterlands of the region's best environmental resources. The natural beauty of Allegany State Park is a strong pull for tourists, attracting 1.8 million visitors in 2000.<sup>3</sup> The Park's 65,000 acres, the majority of which is primitive woodland, make it the largest in the New York State Park system, and the third largest State Park in the country. Most of the Park's visitors travel from western New York and Pennsylvania – the vast majority making this journey via the Zone of Influence.

The Zone of Influence has an immense impact on the economic well being of Cattaraugus County. The region will be afforded greatly increased potential for development if the construction of the proposed Freeway Alternative is realized. This potential must be harnessed and capitalized upon if the County is to develop both prosperous and sustainable tourist-oriented centers, and commercial nodes.

It is important to note that the Zone of Influence is bordered to the south by 30,469 acres of Seneca Nation of Indians land, which includes much of the Allegheny Reservoir.

## **2. Perimeter Zone**

The Perimeter Zone is located within the broader geographic context of the Zone of Influence. In the simplest terms, it may be defined as the general vicinity around each of the Gateway Communities at Cattaraugus County's Park entrances.<sup>4</sup> The Perimeter Zone was established to encourage structured economic development at these Gateway points, with a full array of commercial uses. The Proposed Community Tourism Development Projects emphasize the benefits to be accrued from attracting a percentage of Allegany State Park's tourist body into the Gateway Communities of the Perimeter Zone. These Projects are discussed in detail in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects**. There are five local entrance points into the Park, located at Salamanca, Limestone, Red House, the Quaker entrance, and Bradford, PA. Of these five entrances, only

two boast substantial existing communities in New York State – the City of Salamanca and the Village of Limestone.

The Salamanca Entrance is located directly off Exit 21 of the Southern Tier Expressway (I-86), at State Park Road. Although this entrance point is within the boundary of the City of Salamanca, Park visitors generally do not pass through the downtown area of the City, and in many cases may not even be aware of it. Visitors entering the park directly from the I-86 bypass Salamanca completely, while those arriving from the north along Route 219 pass through the western portion of the City, bypassing the commercial district. The construction of the Route 219 Freeway Alternative would practically eliminate the need to enter Salamanca. The travel time from the Red House Area of Allegany State Park to the nearest commercial services in Salamanca is approximately 10-15 minutes.

The Limestone Entrance is connected to the Park via an unpaved seasonal road, Limestone Run Road. While this road is currently unsigned and only lightly used for standard traffic, it is a popular snowmobile access point into the Park. Plans for the paving of this road as a new year-round vehicular entrance to Allegany State Park are underway. The plan involves the use of 5.85 miles of existing roads and rights-of-way between US Route 219 in Limestone and Allegany State Park. Cattaraugus County, Limestone, and Carrollton each have aggressive Development Plans that are contingent upon this project's completion, with substantial economic and recreational benefits to be realized.

The existing roads traverse four different governmental jurisdictions. Although the entire length of road will eventually be built to a common state standard, the only portion that is not currently paved and suitable for year-round use is under Allegany State Park jurisdiction. All other segments will require some reconstruction, upgrading or repaving, but this work may be accomplished as funding becomes available. A trail entrance to the park is proposed as an adjunct to the entrance road to facilitate access for hikers, bicyclists, horseback riders and others.

Completion of the project will provide the State, County and local community with significant benefits in terms of recreational opportunities, tourism, transportation and economic development. The Limestone vehicle and trail entrance will improve access to the Park's recreational assets for New Yorkers living to the east, and for travelers on Route 219. The new entrance will facilitate the development of a third activity center in the eastern portion of the Park, as outlined in the Allegany State Park Draft Master Plan,

and will improve emergency Park ingress and egress.

The estimated total project cost is \$11.8, million including the road improvements, trail construction, design and engineering, inspection and contingencies. The estimated breakdown of these costs is as follows:

	<u>Roads</u>	<u>Trail</u>	<u>Total</u>
Construction	\$ 5,440,000	\$ 3,300,000	\$ 8,740,000
Design/Engineering (20%)	1,090,000	660,000	1,750,000
Inspection (15%)	<u>820,000</u>	<u>500,000</u>	<u>1,320,000</u>
<b>Total:</b>	<b>\$ 7,350,000</b>	<b>\$4,460,000</b>	<b>\$11,810,000</b>

The magnitude of the total project in relation to available funding will require a phased approach. Cattaraugus County has agreed to treat the trail construction as a separate project to be pursued with NYSOPRHP and the local communities, utilizing TEA-21 enhancement funding if possible.<sup>5</sup> A more detailed breakdown of the cost is available in Appendix B, Allegany State Park Limestone Entrance Component Road Sections.

The upgrading of the Limestone entrance to the Park will necessitate the construction of an entrance station similar to those at the other four entrances. Additional funding will be required from the NYSOPRHP capital budget to cover the costs of construction.<sup>6</sup>

The Red House Entrance is located at Exit 19 of the Southern Tier Expressway, within Allegany State Park. No private lands are accessible from the interchange at this entrance, effectively precluding opportunities for commercial development. The travel time from the Red House Area of Allegany State Park to the nearest commercial services in Salamanca is approximately 10-15 minutes.

The Quaker Entrance is located along NYS Route 280, approximately 25 miles south west of Salamanca, and 8 miles from I-86 Exit 18. No commercial businesses or Park support services are currently located between the Quaker entrance and I-86. Considering the rural character of this access point, opportunities for commercial development in the vicinity of the Quaker entrance are limited. The travel time from the

Quaker Area of Allegany State Park to the nearest commercial services in Salamanca is approximately 20 minutes.

A lightly used road enters Allegany State Park from Bradford PA. This road is unsigned and difficult to find for visitors not familiar with the area.

The Perimeter Zone identifies areas of recreational and environmental importance that lend themselves to development, but must also be protected as immense resources to the area. Based on the key locational factors of proximity to the State Park entrance points, and the existing levels of services and infrastructure, Salamanca and Limestone are the obvious Gateways for planned development. The Gateways represent the hub of the region – the nexus point of regional trails, and the entrance points to the Park. Salamanca is the main gateway to Allegany State Park for visitors traveling southward from Toronto, Buffalo and Ellicottville, located in close proximity to two of the exits for the Park, while Limestone is the first New York State center that visitors encounter when traveling north from Pennsylvania. Both Salamanca and Limestone also enjoy excellent infrastructure amenities. Limestone underwent a complete overhaul of both its sewage system and water supply in recent years. Further to the west, and separated from the Park by the Allegheny Reservoir, Onoville Marina was pinpointed as a key water-based Park edge site. It is ideal for development as a tourist center due to its natural beauty and its location on county-controlled land. It is the County’s single largest recreational investment. In addition, since it is located on a reservoir that stretches into the National Forest, Onoville Marina represents a logical starting point for water access for the entire region.

Currently, the Gateways are under-developed resources, but with careful development strategies each has the potential to develop into a prosperous, tourism-oriented center. Their proximity to the Park is their most marketable quality. It is impossible to overestimate the impact of the Park on the economic well being of Cattaraugus County. It represents the largest recreational tourist destination in the region – attracting in excess of 1.8 million visitors in 2000<sup>7</sup>. The Park’s 65,000 acres, the majority of which is primitive woodland, make it the largest in the New York State Park system. It is the third largest state park in the country. Most of the Park’s visitors travel from western New York and Pennsylvania, with a minority from such places as Ohio and southern Ontario.

While each Gateway Community has a distinctive character, based on its individual local history, environment and people, they share a number of crucial features – a close proximity to the Park, a beautiful natural environment, and a rural atmosphere, with an emphasis on agriculture and forestry as the economic mainstays of yesteryear. Within this broad definition, the unique character of each Gateway Community should be valued, and carefully incorporated into a developable and marketable community theme. Salamanca is heavily influenced by the proximity of the Seneca Nation – a strong and colorful theme that should be woven into the City’s image. Limestone is historically a lumber and tanning town, with a strong rural atmosphere. Onoville Marine Park is an aqua-centric resort, located in a magnificent natural setting.

As a means of incorporating industrial development with the more tourist-oriented Demonstration Projects planned for the Gateway Communities, the Railyard Industrial Park has been planned for development in the vicinity of Salamanca. This project is aimed to act as a magnet for industrial development in the region, thus concentrating industry on a brown-field site and maintaining a distance between tourism and industrial development in order to protect the scenic environment.

The Perimeter Zone as a whole must establish a theme if it is to be successfully marketed and developed as a tourist destination. For advertising purposes, this theme should be succinct, descriptive and compelling, with a view to capturing the imagination of potential visitors. One element of this theme will be the architectural heritage of the region. Salamanca and Limestone each have a good stock of quality residences. The style of these homes is colonial, with large front porches and pitched roofs. The building material is primarily wooden shingles. While some of these structures are in need of superficial maintenance, they remain attractive, and are symbolic of the character of the settlements. The style of these buildings should be emulated in future developments to retain the character and theme of the Perimeter Zone. Downtown Salamanca has retained many of its original commercial buildings. These multi-story, redbrick structures are extremely attractive and unusual. It would benefit Salamanca greatly if such buildings were not demolished to make way for new development, but renovated and refurbished according to accepted Design Standards. Only with adherence to stated regulations and guidelines can the architectural heritage of the Perimeter Zone be retained for future generations.

The topography of the Perimeter Zone is mostly hilly, with some slopes steep enough to preclude development. Residential settlements are clustered in the valley areas. Intermittent areas, along the banks

of the Allegheny River and its more substantial tributaries, lie within the river's floodplain, including parts of Limestone and Salamanca, and a substantial area in the vicinity of Onoville Marina. There is a more detailed discussion of the environmental issues relating to proposed developments in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects**, under Salamanca, Limestone and Onoville Marina respectively.

The Perimeter Zone and its immediate hinterlands boast increasingly diverse and extensive shopping connections. There is a strong market for specialty craft shopping, including Amish Crafts from nearby Randolph. With a sharper focus on the promotion of tourism, Cattaraugus County can diversify and stabilize its economy. A diversified economy offers increased employment opportunities, which in turn attract potential employees and generate increased local expenditure.

### **3. Allegheny State Park**

Allegheny State Park is the largest outdoor recreation destination in Cattaraugus County. The Park's 65,000 acres, most of it primitive woodland, make it the largest in the New York State Park system and the third largest state park in the country. The Park is divided into two major developed areas, Red House and Quaker, each providing a variety of recreational activities including camping, picnicking, swimming, canoeing, hiking, biking, horseback riding, hunting, fishing and general nature appreciation. The State Park's mixed oak and hardwood forests, mountains, rolling hills and meadows, streams, ponds and lakes attract outdoor recreation enthusiasts year-round. Camping facilities are provided, with over 315 tent and recreational vehicle sites, half of which have electrical hookups. There are also 380 rustic cabins available for rent, some with fireplaces for heating, others with electricity and gas supplied. Six cottages have been upgraded to include full housekeeping services. Park representatives state that the housekeeping cottages are booked to capacity year-round, while the rustic cabins are full at most times. Camping support facilities include two general stores, both operated by private vendors. The campsites also operate at capacity throughout the summer, and on weekends during the late spring and early fall. Winter cabin rentals are popular during hunting and snowmobile seasons. A listing of the facilities currently available within the Park has been prepared. (See Table 1 – Facilities Currently Available within Allegheny State Park)

<b>Table 1: Facilities Currently Available within Allegany State Park</b>	
<b>Accommodation</b>	
Camping – 315+ tent and recreational vehicle sites, half with electric hookups	
Rustic Cabins – 380	
Upgraded Log Cabins – 6	
<b>Shopping Facilities</b>	
Two General Stores, operated by Private Vendors	
<b>Equipment Rental Facilities</b>	
Bicycles, Skates and Non-Motorized boats are available for rental	
<b>Boating Facilities</b>	
Onoville Marina – 394 dock spaces, 20 to 40 foot slips, some with power	
<b>Trails</b>	
Bicycle Trails – both road biking and mountain biking	
Walking Trails	
Conservation Trail with a link into the National Forest	
Snowmobile Trails	
Cross Country Ski Trails	
<b>Hunting and Fishing</b>	
Both allowed in Season	

Source: Cattaraugus County Department of Economic Development, Planning & Tourism, 2000

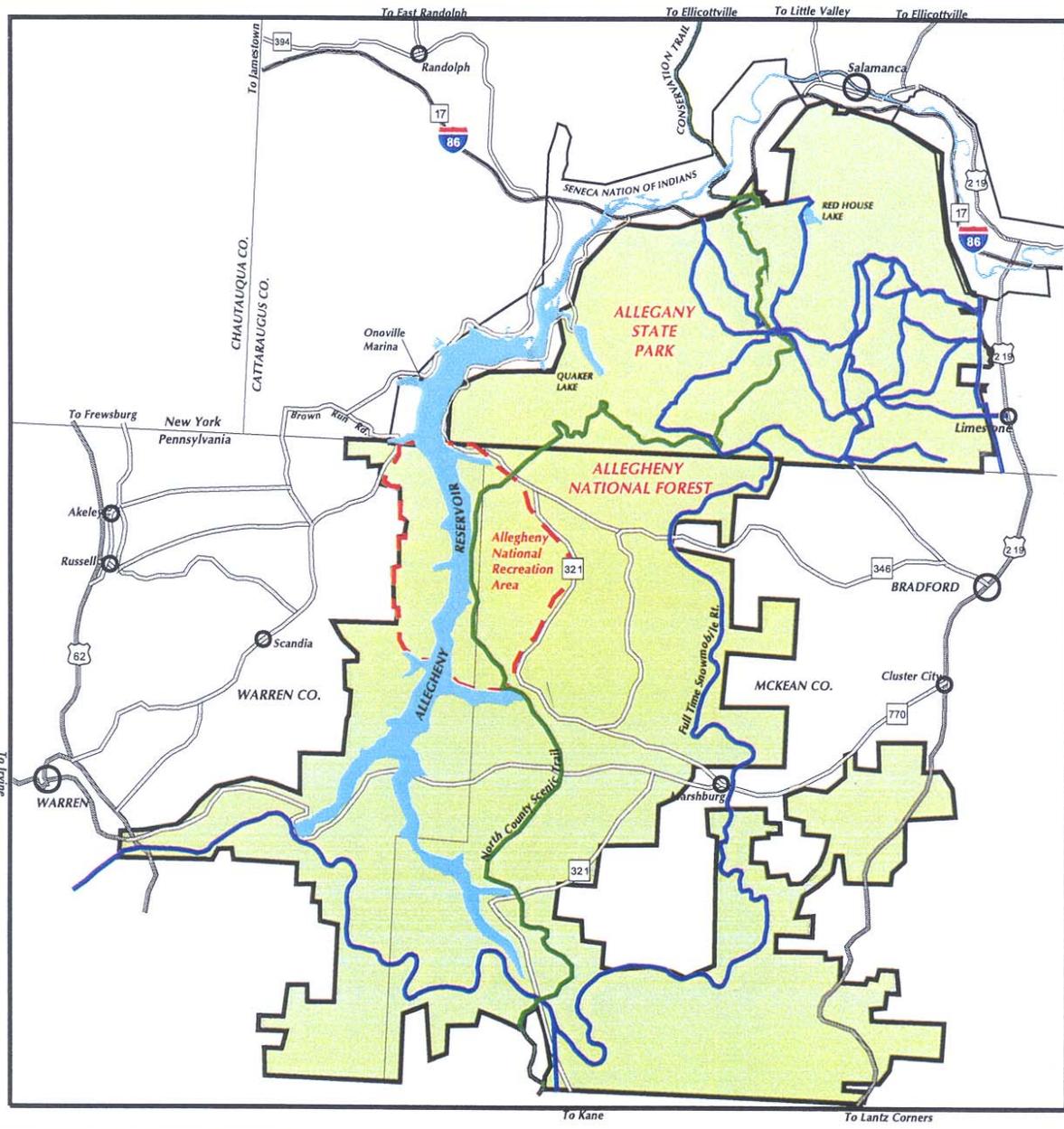
There is an extensive network of trails throughout Allegany State Park, connecting into the wider National Forest system in Pennsylvania. These trails include paths dedicated to hiking, equestrian pursuits and mountain biking during the spring, summer and fall seasons, and to cross-country skiing and snowshoeing in the winter. A 5.6 mile paved trail is provided for road biking and in-line skating, and

more than 90 miles of park trails are dedicated to snowmobile use. The extensive trails system within the Park has made it a popular destination for mountain bike enthusiasts. Bike trails in the Roscoe area and within Allegany State Park periodically host Western New York Mountain Bike Association sanctioned races, including the annual Raccoon Rally, which draws large numbers of participants and spectators. These trails, and trails outside the boundary of the Park, are discussed in greater detail in **Section D, Part 2, c, Existing Regional Tourism Resources.**

Non-motorized boat (peddle and canoe) and bicycle (road and mountain) rentals are available during the summer months, and cross-country ski and snowshoe rentals are available throughout the winter months through a private vendor within the Park. Hunting is permitted seasonally in dedicated areas.

Despite the myriad of facilities and resources offered within the Park, it remains relatively unknown. One of the chief issues facing Allegany State Park today is in marketing itself as a tourist attraction in New York State and beyond. (See Map 3 – Allegany State Park and Regional Connections)

# ALLEGANY STATE PARK & ALLEGHENY NATIONAL FOREST REGIONAL CONNECTIONS



-  SOUTHERN TIER EXPRESSWAY
-  U.S. HIGHWAYS
-  COUNTY AND STATE HIGHWAYS



-  CONSERVATION TRAIL
-  SNOWMOBILE TRAILS

Map 3

## ALLEGANY STATE PARK PERIMETER STUDY CATTARAUGUS COUNTY

THE SARATOGA ASSOCIATES

LANDSCAPE ARCHITECTS, ARCHITECTS, ENGINEERS AND PLANNERS, P.C.  
SARATOGA SPRING, NEW YORK CITY AND BOSTON

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Park visitation has increased steadily in recent years, from approximately 1.1 million visitors in 1990, to 1.9 million in 1999, and 1.8 million in 2000.<sup>8</sup> Approximately one third of Park visitors come from within the Southern Tier Region, thirty to forty percent from the Niagara Frontier State Parks Region, including the Buffalo metropolitan area, fifteen percent from other states and countries, and the remainder from New York State. Park representatives state that typical Park visitors are working class individuals or families, visiting the Park to take advantage of low cost ‘soft adventure’ or passive outdoor recreation opportunities. Approximately one quarter of Park visitors stay one or more nights, while three quarters are day visitors. In keeping with a statewide trend, the rate of day use has declined in recent years. In 1995, total regional expenditure associated with park visitors was estimated to have been approximately \$21.6 million. Park representatives anticipate that the Route 219 Upgrade will increase park attendance, but as yet no studies have been conducted to identify or evaluate this potential impact.<sup>9</sup> A statewide Park user survey was conducted in the year 2000, the results of which are currently being compiled. (See Table 2, Allegany State Park Attendance Figures)

<b>Table 2: Allegany State Park Attendance Figures</b>	
1970	866,000
1980	1,414,000
1990	1,144,545
1991	1,167,591
1994	1,400,000
1998	1,812,086
1999	1,908,805
2000	1,814,090

Source: NYS Office of Parks, Recreation and Historic Preservation, 2001 & Peat Marwick, 1988<sup>10</sup>

## **C. PREVIOUS STUDIES**

### **1. Previous Economic Development Studies**

This section of the Perimeter Study briefly outlines previous studies on economic development in the region. These studies centered on an analysis of Cattaraugus County's economic potential. One of the main focuses of each study was the potential impact that the proposed Freeway Alternative would have on the County, and specifically the economic benefits that would accrue in terms of increased employment, business and industrial opportunities and associated revenue generation. The studies are entitled: the New York State Department of Transportation Route 219 Study, the Route 219 Economic Strategy Study, Local Land Use and Infrastructure Study, and Congressional Testimony in Support of Route 219 as a Four Lane Expressway Through Cattaraugus County.

#### a. New York State Department of Transportation Route 219 Study:

(New York State Department of Transportation (NYSDOT), May 1998)

This Study is the most recent economic analysis by the NYSDOT, and was completed in April 1998. In its highest estimate, the Study predicts the creation of 19,800 temporary construction jobs by the Freeway Alternative. It estimates that in addition to the estimated natural increase in employment of approximately 4,000, an additional 9,450 permanent jobs will be created in Cattaraugus County by the year 2025, if the Freeway is constructed by the year 2005.

A review of the data contained in the NYSDOT Route 219 Study as outlined above indicates that the local and regional economy would reap significantly greater economic benefits from the Freeway Alternative than from the Upgrade Alternative. The Cattaraugus County Legislature and the Route 219 Development Committee completed the studies outlined below in order to identify more specific, project-level development opportunities.

#### b. Route 219 Economic Strategy Study:

(Thomas Point Associates and The Saratoga Associates, Consultants, 1994-1995)

This study is divided into four separate documents:

##### i) An Analysis of the Existing Conditions

- ii) An Economic Development Strategy and Projects
- iii) Demonstration Projects
- iv) Marketing and Organizational Strategy

i) Analysis of Existing Conditions: First Technical Memorandum (July 1995):

This document presents an analysis of the region's existing conditions in terms of economy, land use trends in transportation, tourism, recreation, commercial and industrial development, and promising business sectors.

ii) Economic Development Strategy and Projects: Second Technical Memorandum (Sept 1995):

This document presents a development strategy for Cattaraugus County. It evaluates over 40 potential projects including commercial, industrial, residential, tourism and recreation, and public infrastructure and development programs. In addition, it proposes a strategy for implementing projects including organizational responsibilities and potential funding sources.

iii) Demonstration Projects: Third Technical Memorandum (November 1995):

This document develops six specific 'demonstration projects' in greater detail in order to illustrate potential economic benefits to be derived locally by Route 219 expansion, particularly the Freeway Alternative. These clusters of project opportunities include the Ashford Business Center, a Tourism/Cultural Center, Industrial Park and Planned Recreation Resort for Ellicottville, the Airport Business Center (new airport site), a major multi-modal (rail/truck) Business Center in Salamanca, and the proposed entrance to New York State from Pennsylvania at the Limestone Gateway Center (which also is located at a newly proposed entrance to Allegany State Park).

iv) Marketing and Organizational Strategy: Fourth Technical Memorandum (December 1995):

This document presents alternatives for marketing and organizing Cattaraugus County's efforts to develop these Route 219 potentials over the next ten to twenty years. This includes marketing objectives for all major types of development, international business attraction, business retention, and local infrastructure and land use planning.

c. Local Land Use and Infrastructure Study:

(The Saratoga Associates, 1995-1996, Published March 1996):

This is the second major study relating to Route 219 that was authorized by the Cattaraugus County Legislature, and is based on detailed interviews with County and local officials, and business people. It presents specific growth and development potentials in every section of Cattaraugus County, conducts inventories, makes projections for water, sewage and gas service areas and presents comprehensive development principles to guide County and municipal decision making over the next two decades.

The report concludes with a series of recommendations for land use and infrastructure planning, scenic highway design, economic development, potential funding sources and data management improvements. In particular, it recommends that future planning look at the Route 219 corridor in order to create local roads that offer east-west linkages with Route 219's north-south corridor. This would maximize future growth potentials in Cattaraugus County near the seven proposed interchanges and along local interconnecting roads.

d. Congressional Testimony in Support of Route 219 as a Four Lane Expressway Through Cattaraugus County (Cattaraugus County Legislature, October 8, 1996)

This document summarizes the findings of the previous studies, as listed above, and presents a rationale with economic projections that support the need for a Freeway Alternative for Route 219. The testimony is by Gerard Fitzpatrick, County Legislator and Chairman of the County Legislature's Route 219 Development Committee and Terry H. Martin, Ph.D., Project Manager for the County's Route 219 Development Committee and consultant studies.

The County's Strategy Study estimates that more than 3,000 jobs will be created over a period of twenty years, \$160 million in investments will occur in construction, and \$1.5 million in new annual property taxes will be generated in Cattaraugus County. These local estimates are based on six major demonstration projects analyzed by the County's consultants for the Route 219 Development Committee. Additional potentials exist that have not yet been studied. Whether reviewing the NYSDOT's estimates, or local estimates, the potential benefits are significant.

## 2. Concurrent Economic Development Studies

The proposed north-south high-speed travel corridor, and its major crossroads with the Southern Tier Expressway, would reduce travel time for trucks and passenger vehicles in all directions, including cross-border trips to Canada. This improved infrastructure would draw interstate travel both ways between Atlantic seaboard states and Canada, which is the largest volume-trading partner of the United States in the world. It is proposed that seven interchanges be developed along the route of the new highway, with significant development and investments anticipated to locate in the vicinity of these interchanges. These interchanges will be in the immediate vicinity of five of the six demonstration projects, as outlined in **Section D, Part 1, d, Proposed Industrial and Business Demonstration Projects**, and **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects**.

a) Central Corridor Market Research and Development – Four-Year Program (Ashford, Town and Village of Ellicottville, Great Valley, Salamanca and Limestone):

Cattaraugus County's Department of Economic Development, Planning and Tourism is the sponsor of this Project, which is funded by the Appalachian Regional Commission. The aim of the Project is to create and implement a market research and development program for six business development demonstration projects, as recommended in Cattaraugus County's Route 219 Corridor economic strategy, to attract businesses to take advantage of the proposed new \$500 million Route 219 expressway. The program would directly benefit the Towns of Ashford and Great Valley, the Town and Village of Ellicottville and Limestone, and the City of Salamanca.

Research is being conducted into feasible development prospects, and the introduction of potential investors to proposed demonstration projects. The Project includes the identification of sites in the central north-south highway corridor of Cattaraugus County between Springville and Bradford, PA, and refining existing project proposals. Technical assistance in planning and land use design techniques is also being offered to these communities with a view to protecting the environment, desired community character, and the County's rural and natural tourism themes. This strategy is designed to help communities develop sustainable local economies that provide employment and entrepreneurial opportunities to all citizens, promoting and supporting a high quality of life.

Anticipated Project outcomes include the creation of a regional awareness of demonstration projects (warehousing, manufacturing, office, retail and tourism potentials) by contacting businesses, major real estate organizations, and using trade shows and the Internet. The objective is to attract new investments to these communities.

b) Randall Arendt Program for Cattaraugus County:

The purpose of this planning initiative is to illustrate to Cattaraugus County how to improve the quality of life by saving farmland, protecting property values, discouraging sprawl, preventing environmental problems and promoting open space and trails along with new development. These objectives need to be accomplished while Cattaraugus County evolves throughout the 21st Century.

This service, entitled “Leadership Training and Visioning Program”, is designed to produce a consensus-based vision for Cattaraugus County’s future development. A supporting set of guidelines and technical materials are being prepared that are based on local participation during the years 1999 to 2001.<sup>11</sup>

c) Cattaraugus Empire Zone:

The Cattaraugus Empire Zone (CEZ) offers new and existing companies opportunities for growth and expansion. Facilities located within the zone enjoy a healthy business environment with all the goods, services, and facilities necessary for economic success. The Empire Zone offers firms a combination of development opportunities that are not found anywhere else. Its functions are being expanded to include other locations in the County. Along with attractive state and local incentives, the zone offers outstanding industrial facilities, flexible manufacturing space, and high standard office accommodations.

d) Allegany State Park Perimeter Study:

As previously stated, proposed highway improvements in Cattaraugus County (I-86 and Route 219) are expected to place the Allegany State Park and Salamanca at the center of a major regional transportation and tourist crossroads. This crossroads would create locational advantages for a variety of traditional industrial and commercial investments, as well as for tourist-related investments. The Perimeter Study has been undertaken to identify new opportunities for industrial investments related both to the regional crossroads and to expanded tourism in the Gateway Communities of Salamanca, Limestone and Onoville Marina, with a view to increasing the diversity of new jobs in Cattaraugus County.

## **D. ECONOMIC OPPORTUNITIES AND DEMONSTRATION PROJECTS**

This section outlines the existing assets of Cattaraugus County, both in economic and physical terms. These assets are listed by category, inside and outside the park respectively. The economic development potential of the County is discussed, with particular emphasis on the potential benefits to be derived from the proposed construction of the Route 219 Freeway Alternative. Excellent potential market support is reflected in the employment figures projected by the NYS Department of Transportation, contingent upon the Route 219 improvements.

### **1. Industrial/Business Development Potential**

#### **a) Route 219 Opportunities**

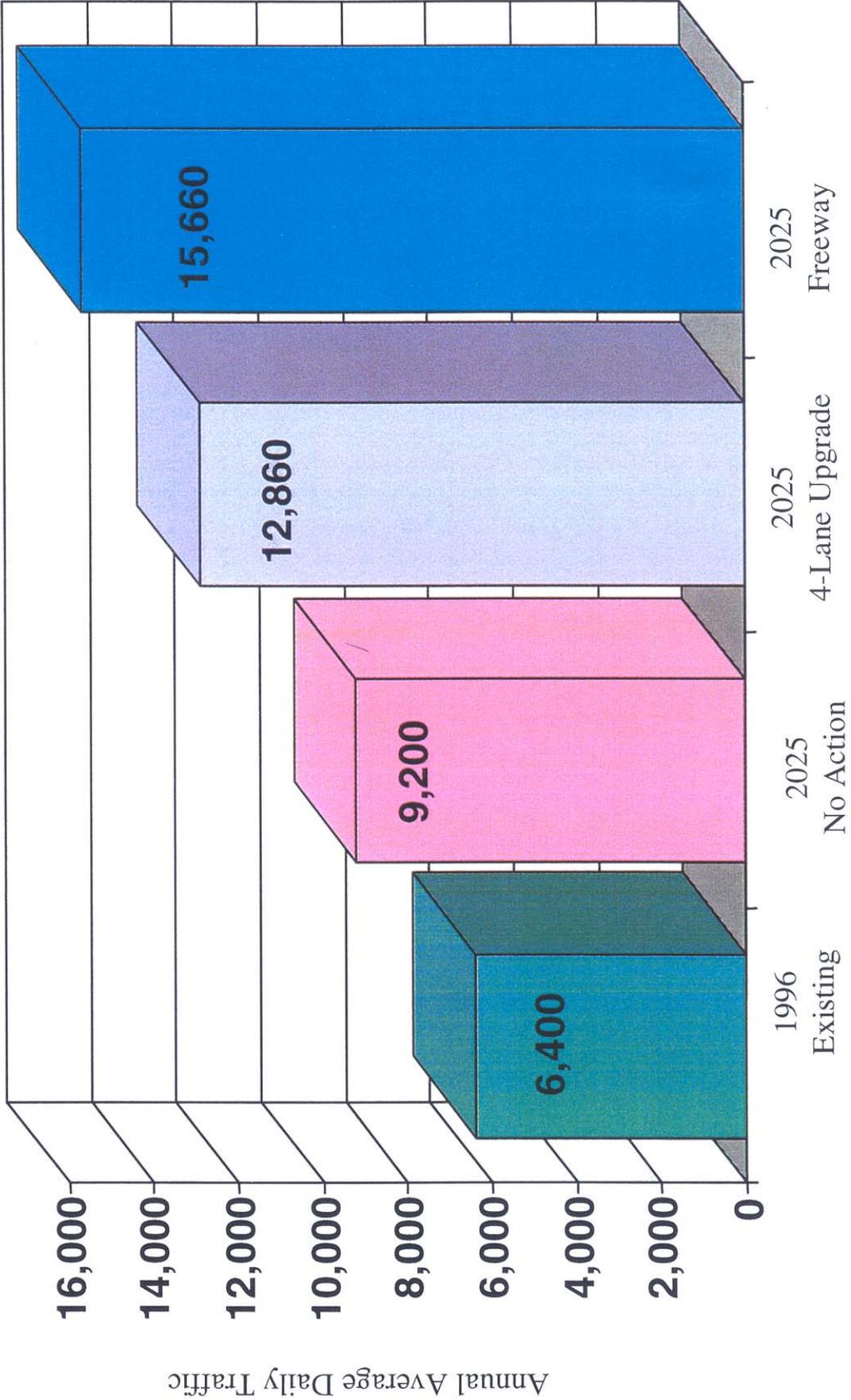
The economic implications of the proposed construction of the Route 219 Freeway Alternative are numerous, and extremely positive. It is anticipated that dramatic growth would be instigated by the expansion of Route 219, with many associated benefits for Cattaraugus County. NYS Department of Transportation Traffic Projections are depicted in tabular, chart and map form. The estimated figures are based upon 1996 traffic levels, which were then projected forward to reflect three different alternatives – one in which there is no change to the current situation (known also as the Null Alternative), one in which of Route 219 is Upgraded (known also as the Upgrade Alternative), and one in which the Freeway Alternative is completed (known also as the Freeway Alternative). It is important to note that NYSDOT representatives state that traffic flow in the County is being monitored on an ongoing basis.

(See Table 3, Department of Transportation Traffic Projections for the Gateway Communities, Chart 1, NYS Department of Transportation Traffic Projections for the Gateway Communities, Map 4, NYS Department of Transportation Traffic Projections for Route 219 and I-86, and Appendix C of this study, NYS Department of Transportation Traffic Projections Segment Traffic Volume Comparison)

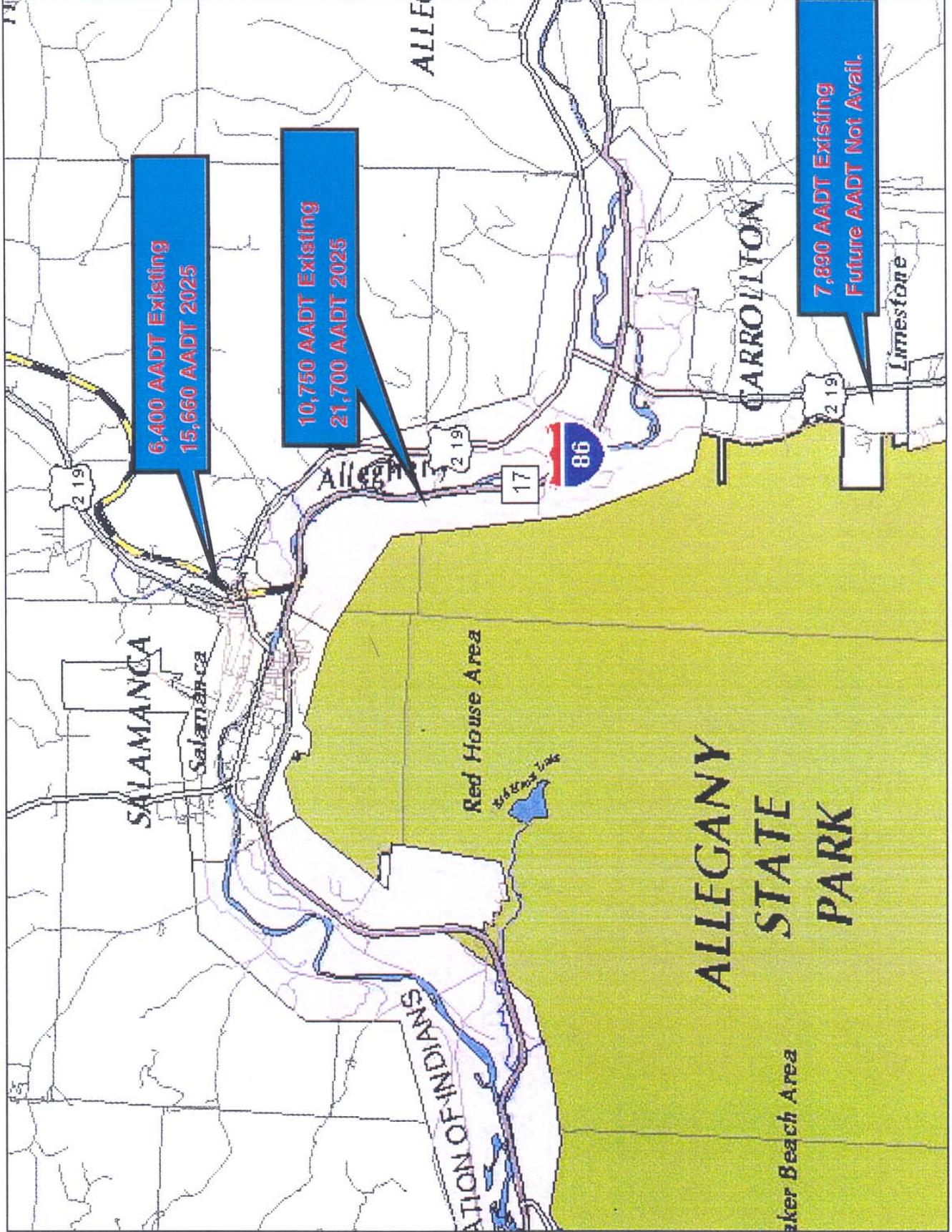
<b>Table 3: Traffic Projections for Gateway Communities</b>	
<b>Bus Route 219, Exit 23 to Route 417 - Limestone</b>	
1996 Existing	3,250
2025 No Build	5,000
2025 Upgrade	3,140
2025 Freeway – Old U.S. 219 & Freeway	3,430
<b>Route 219, Salamanca Nth City Line to Route 98</b>	
1996 Existing	6,400
2025 No Build	9,200
2025 Upgrade	12,860
2025 Freeway – Old U.S. 219 & Freeway	15,660
<b>Route 17, Exit 22 to Exit 21 - Salamanca</b>	
1996 Existing	10,750
2025 No Build	15,400
2025 Upgrade	14,570
2025 Freeway – Old U.S. 219 & Freeway	16,140

Source: NYS Department of Transportation, Route 219 Study, Appendix E, Traffic Report April 1998

Chart 1 - Department of Transportation Traffic Projections for Route 219 and I86



Map 4 - Department of Transportation Traffic Projections for Route 219 and I86



As part of its study of Route 219, the NYS Department of Transportation (NYSDOT) has provided employment data from 1970, 1980 and 1990, and made employment forecasts by sector for 2025. NYSDOT notes in Appendix F of its study that Canada is the United State’s single largest trading partner, with 38% of all U.S.-Canadian trade passing through the Buffalo region. It further notes that Western New York has numerous economic assets, including a skilled work force, a low cost of living, a good quality of life and a well-developed transportation infrastructure. While the region is well positioned to take advantage of the growing trade with Canada, it lacks an efficient north-south link to the interstate highway system. This deficit has contributed to slower economic growth in the region than has been experienced by other key trade corridors. The extension of the interstate-level expressway system would complete this critical regional transportation link, thus greatly increasing the region’s attractiveness as a gateway for the growing Canadian trade market, and supporting important regional industries. As previously mentioned, NYSDOT’s study considered three alternatives for Route 219 – the Null Alternative, the Upgrade Alternative and the Freeway Alternative.

Under the Null Alternative, whereby normal maintenance activities on the existing Route 219 would continue, but no changes or improvements would be made, slow job growth of approximately 0.31% per annum is projected for Cattaraugus County through the year 2025. The analysis year ‘2025’ was chosen because it represents twenty years beyond the earliest construction completion date for the project, and is used by NYSDOT for comparative purposes.

Under the Upgrade Alternative, whereby Route 219 between Springville and Salamanca would be widened to four lanes, a total of 9,250 construction related jobs would be supported by 2025, including on-site workers, workers with construction suppliers and spin-off employment. With improved mobility and accessibility, the long-term benefits of the Upgrade Alternative are estimated to include some 3,900 new jobs in Cattaraugus County – a 9% increase on the Null Alternative. NYS Department of Transportation projections indicate that if the Route 219 Upgrade Alternative is completed, the numbers employed in Cattaraugus County’s services industries will increase by approximately 80% from 1995 figures, representing an extremely substantial increase and an enormous economic boost for the region.<sup>12</sup>

The Freeway Alternative involves the construction of a new 4-lane divided Freeway between Springville and Salamanca. Under this Alternative, a total of 19,800 construction-related jobs would be supported, and, with even greater mobility and accessibility, the long-term benefits are estimated to total 9,450 new

jobs – an increase of 22% over the Null Alternative. Further employment estimates were cited in Congressional Testimony in Support of Route 219 as a four-lane expressway through Cattaraugus County. This report estimated in 1996 that the Freeway Alternative would generate 3,700 new jobs, \$160 million in new construction, and \$1.5 million in annual new property taxes in Cattaraugus County over a period of 10-15 years.<sup>13</sup>

Table 4 illustrates the Upgrade Alternative and the Freeway Alternative, and their potential long-term development impacts. The job estimates are broken down by geographic location and by industry. (See Table 4, Potential Long-Term Development Impacts by Town and Industry, and further details in Appendix D, NYS Department of Transportation’s projected Potential Long-Term Development Impacts in Project Area)

**Table 4 – Potential Long-Term Development Impacts by Town and Industry**

Employment Category	Town	Number of Jobs	
		Upgrade Alternative	Freeway Alternative
<b>Southern Erie County</b>			
<b>Manufacturing/Mining</b>	Concord	200	350
<b>Office/Government</b>	Concord	300	760
<b>Retail/Services</b>	Concord	580	1050
<b>Erie County – Total Jobs from Local Development</b>		1080	2160
<b>Cattaraugus County</b>			
<b>Manufacturing/Mining</b>	Ashford	100	150
<b>Office/Government</b>	Ashford	200	400
<b>Retail/Services</b>	Ashford	250	400
<b>Manufacturing/Mining</b>	Ellicottville	10	200
<b>Office/Government</b>	Ellicottville	150	300
<b>Retail/Services</b>	Ellicottville	240	350
<b>Manufacturing/Mining</b>	Great Valley	20	50
<b>Office/Government</b>	Great Valley	30	150
<b>Retail/Services</b>	Great Valley	350	400
<b>Manufacturing/Mining</b>	Salamanca	300	1000
<b>Office/Government</b>	Salamanca	300	750
<b>Retail/Services</b>	Salamanca	650	2000
<b>Manufacturing/Mining</b>	Rest of County	220	650
<b>Office/Government</b>	Rest of County	170	550
<b>Retail/Services</b>	Rest of County	930	2100
<b>Cattaraugus County – Total Jobs from Local Development</b>		3920	9450

Source: Table F.4-5, NYS Department of Transportation, Route 219 Study, Appendix F, Economic Impact Analysis, 1998

The NYSDOT figures presented in Table 5, below, are based on the Null Alternative, whereby the lack of any new construction would mean that there would be no external stimulus instigating increased economic activity and development. Currently, 35% of the employment in Cattaraugus County is in the services industry. Under the Null Alternative, employment figures in both the services and the construction industries are predicted to rise by approximately 80% from the 1995 rate, while employment in manufacturing is predicted to fall by approximately 30%. This shift in favor of the services industry is in keeping with current national trends. Overall, the NYSDOT estimates that 4,000 new jobs will be created in Cattaraugus County by 2025 without the expansion of Route 219.<sup>14</sup>

<b>Table 5: Employment Figures and Projections by Sector Based on Existing Conditions (the Null Alternative)</b>					
<b>Employment Category</b>	<b>1970</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>	<b>Estimated Figures for 2025</b>
Agriculture, Fisheries, Forestry and Mining	2,290	2,740	2,240	2,160	2,040
Construction	1,180	980	1,400	1,360	1,970
Manufacturing	9,290	9,280	8,610	6,560	4,440
Transport, Utilities and Communication	1,630	1,280	1,300	2,300	2, 240
Wholesale Trade	1,000	1,210	1,210	1,130	1,290
Retail Trade	4,890	5,950	6,900	7,350	7,500
Finance, Insurance and Real Estate	1,470	1,630	1,250	1,380	1,270
Services	4,680	6,680	10,700	10,790	15,410
Government	5,950	6,330	6,410	6,730	7,500
<b>Total All Industries</b>	<b>32,380</b>	<b>36,080</b>	<b>40,020</b>	<b>39,760</b>	<b>43,660</b>

Source: NYS Department of Transportation, Route 219 Study, Appendix F - Economic Impact Analysis, 1998

Employment in tourism is particularly significant in terms of its high multiplier effect. This is because it is a 'jobs engine', requiring a comparatively large labor force. These labor force earnings tend to stay

within the community, adding to the overall economic benefits.<sup>15</sup> Travel and Tourism as an industry ranks second in the State, and New York State as a whole ranks third in U.S. tourism expenditure.<sup>16</sup> Tourism employment in Cattaraugus County has grown at the fourth highest rate in New York State in the period from 1988 to 1996, with a 36% increase.<sup>17</sup>

While the growth in the numbers employed in tourism is encouraging, the need to draw employers who will provide year-round employment remains. In response to the predicted potential for industrial and business oriented employment opportunities, Cattaraugus County is actively pursuing the development of a number of Industrial and Business projects in the Perimeter Zone and the Zone of Influence. One such project, Railyard Industrial Park, is proposed for development in the Town of Great Valley, at the northeast corner of Salamanca. Additional Industrial and Business Parks proposed include Ellicottville Scenic View Business Park, Ashford Nuclear Educational Center and Business Park, and the Airport Business Center. These projects are situated within the boundary of the Zone of Influence. All existing and proposed Industrial and Business Parks are discussed in greater detail in **Section D, Part 1, d, Proposed Industrial and Business Demonstration Projects.**

### **b) Economic Development Potential**

With the construction of the Freeway Alternative, a major international and regional crossroads would be created at the intersection of Route 219 (north/south) and I-86 (east/west). This crossroad would generate enormous advantages for the Cities of Olean and Salamanca, and the Seneca Nation of Indians, by virtue of their strategic locations. Analysis conducted by TSA indicates that this inter-modal capacity may represent the means by which Cattaraugus County can attract firms by acting as a low-cost location for companies serving nearby metropolitan markets within New York State. The term ‘inter-modal’ in the context of this study refers to the transfer of goods and services from one mode of transport to another, for example from freight train to truck or plane. Success in attracting firms to a ‘satellite’ location will have the follow-on effect of increasing the demand for distribution operations in shipping the goods produced to the metropolitan markets. This improved, efficient access to Cattaraugus County will also benefit the existing tourism, timber, gravel and manufacturing industries, as well as commuters to Erie County.

Cattaraugus County will be a very attractive relocation destination for firms with a history in the area, such as Dresser-Rand, and to firms that can use the location as a low-cost base of operations to serve nearby metropolitan areas within New York State. In this context, TSA has examined economic activity in the Buffalo area (Erie County), the Rochester area (Monroe County), Cattaraugus County, Chautauqua County and Allegany County, in order to identify industries that could serve as potential relocation/expansion targets.

This preliminary industry targeting analysis consists of two components. Firstly, employment trends by industry have been examined to identify the industries in Erie, Monroe, Cattaraugus, Chautauqua and Allegany Counties that have shown strong growth in the region in comparison to statewide levels of growth. The conclusions reached are based on a positive ‘local share’ component resulting from a shift-share analysis conducted using US Department of Commerce County Business Patterns data from 1993 to 1997. Only firms employing in excess of 250 employees were analyzed, as beneath this threshold even very modest increases or decreases in the labor force represent substantive percentile changes, and as such may render the shift share analysis inaccurate and skew overall results and recommendations. Due to the high levels of suppression at the four-digit level in Cattaraugus, Chautauqua and Allegany Counties, these figures have been brought to the two-digit level only. Suppression is a process whereby, for reasons of individual firm confidentiality, a range of figures, for example 20–99, is supplied rather than an employee headcount. Where a very wide range is offered in relatively small firms, for example a range of 250–499, the analyst must choose 375 by default. However, the actual figure may be 251 or 498. Thus, this practice may distort the shift share analysis and result in inaccurate conclusions being drawn.

The results of this analysis suggest that the recruitment efforts should focus primarily on industries in electronic components, industrial machinery, specialty plastics, and business services in Monroe. Growth in business services was also extremely strong in Cattaraugus and Chautauqua Counties, at 51% and 93% respectively, representing a significantly sharper growth than the statewide level. We further suggest a secondary focus on fabricated metals and computer-related business services. Both Cattaraugus and Chautauqua Counties experienced substantial increases in the numbers employed in amusement and recreation services, significantly higher than the 10.8% growth rate at state level. (See Table 6, Refined Industry Targets)

**Table 6: Refined Industry Targets  
(Selected for Strong 'Local Share' & Employment Growth)**

<b>SIC Code</b>	<b>Industry</b>	<b>1997 Employment</b>	<b>% Change, 1993-97</b>
<b>Monroe County</b>			
36	Electronic Equipment		
3663	Radio And TV Communications Equipment	1,698	11.1%
3670	Electronic Components And Accessories	882	59.5%
3679	Electronic Components, N.E.C.	732	66.4%
73	Business Services		
7370	Computer And Data Processing Services	7,260	70.1%
7374	Data Processing And Preparation	2,847	211.5%
7379	Computer Related Services, N.E.C.	889	176.1%
7380	Miscellaneous Business Services	3,678	27.6%
7389	Business Services, N.E.C.	1,892	36.5%
7371	Computer Programming Services	1,550	23.8%
7372	Prepackaged Software	639	139.3%
7373	Computer Integrated Systems Design	418	25.5%
35	Industrial and Commercial Machinery		
3550	Special Industry Machinery	1,159	276.3%
3559	Special Industry Machinery, N.E.C.	923	541.0%
3540	Metalworking Machinery	3,662	8.9%
3541	Machine Tools, Metal Cutting Types	1,392	14.5%
3544	Special Dies, Tools, Jigs and Fixtures	1,278	5.3%
3545	Machine Tool Accessories	535	6.5%
34	Fabricated Metal Products		
3450	Screw Machine Products, Bolts, etc.	1,503	26.5%
3451	Screw Machine Products	1,405	30.7%
3444	Sheet Metalwork	904	36.5%
3420	Cutlery, Hand tools, and Hardware	831	23.9%
3429	Hardware, N.E.C.	734	25.3%
3440	Fabricated Structural Metal Products	1,461	11.9%
3490	Misc. Fabricated Metal Products	1,045	6.4%
<b>Erie County</b>			
73	Business Services		
7323	Credit Reporting Services	223	175.3%
7330	Mailing, Reproduction, Stenographic	762	29.2%
7370	Computer and Data Processing Services	2,707	10.5%
7374	Data Processing and Preparation	1,267	5.4%
7380	Miscellaneous Business Services	5,437	10.9%

**Table 6: Refined Industry Targets  
(Selected for Strong 'Local Share' & Employment Growth)**

SIC Code	Industry	1997 % Change, 1993-97	
		Employment	
7389	Business Services, N.E.C.	2,135	5.6%
Cattaraugus County			
20	Manufacturing		
3400	Fabricated metal products	630	7.5%
3500	Industrial machinery and equipment	1425	1.4%
70	Services		
7300	Business services	355	51%
7900	Amusements and recreation	434	145.2%
Chautauqua County			
20	Manufacturing		
2400	Lumber and wood products	338	6%
2500	Furniture and fixtures	2468	11%
2800	Chemical and allied products	298	46.8%
3200	Stone, clay, and glass products	501	6.8%
3500	Industrial machinery & equipment	3291	20.1%
70	Services		
7000	Hotels and other lodgings	1009	11.6%
7300	Business services	2024	93.3%
7500	Auto repair, services and parking	317	18.7%
7900	Amusement and Recreation	526	28%
8000	Health services	5522	13.9%
Allegany County			
20	Manufacturing		
	Electronics	375*	114.3%
Source: Compiled by the Saratoga Associates from County Business Patterns data			

\* Estimated figure based on suppressed data

Our analysis has also identified industries that currently serve as suppliers to such firms. These results were reached by using the Regional Input-Output Multiplier System (RIMS-II) of the US Bureau of Economic Analysis. Through the RIMS system, typical purchasing patterns for firms in the major industries in Erie and Monroe counties have been identified. Table 7, overleaf, lists target ‘supplier’ firms, and specifies which industries in which counties are likely to be served by them. This information was compiled by TSA from data from the US Bureau of Economic Analysis Regional Input/Output Multiplier System (RIMS-II), Table 1-f. (See Table 7, Industries Supplying Firms in Erie and Monroe Counties)

**Table 7: Industries Supplying Firms in Erie and Monroe Counties**

<b>Targeted Supplier Industry: 50.0400 Industrial and commercial machinery and Equipment, N.E.C. (SIC 3599)</b>	<b>Customer Location</b>	<b>Typical Share of Supplier Purchases</b>
Customer Industries		
47.0100 Machine tools, metal cutting types (SIC 3541)	Monroe	6.9%
47.0500 Metalworking machinery, N.E.C. (SIC 3549)	Monroe	4.3%
48.0600 Special industry machinery, N.E.C. (SIC 3559)	Monroe	5.1%
49.0100 Pumps and compressors (SIC 3561, 3563)	Monroe	5.5%
50.0400 Industrial & commercial machinery & equip, N.E.C. (SIC 3599)	Monroe	15.2%
<b>Targeted Supplier Industry: 57.0300 Other electronic components (SIC 3672, 3675-9)</b>	<b>Customer Location</b>	<b>Typical Share of Supplier Purchases</b>
Customer Industries		
51.0104 Computer Peripheral Equipment (SIC 3572, 3575, 3577)	Monroe	16.0%
51.0400 Office Machines, N.E.C. (SIC 3579)	Monroe	7.5%
56.0300 Telephone and Telegraph Apparatus (SIC 3661)	Monroe	31.8%
56.0500 Communication Equipment (SIC 3663, 3669)	Monroe	35.6%
73.0104 Computer and Data Processing Services (SIC 7371-9)	Erie, Monroe	7.5%
<b>Targeted Supplier Industry: 32.0400 Miscellaneous plastics products, N.E.C. (SIC 3081-9)</b>	<b>Customer Location</b>	<b>Typical Share of Supplier Purchases</b>
Customer Industries		
47.0500 Metalworking Machinery, N.E.C. (SIC 3549)	Monroe	3.3%
49.0100 Pumps and Compressors (SIC 3561, 3563)	Monroe	3.3%
51.0104 Computer Peripheral Equipment (SIC 3572, 3575, 3577)	Monroe	3.2%
51.0400 Office Machines, N.E.C. (SIC 3579)	Monroe	7.2%
56.0300 Telephone and Telegraph Apparatus (SIC 3661)	Monroe	5.2%
56.0500 Communication Equipment (SIC 3663, 3669)	Monroe	2.2%
57.0300 Other electronic Components (SIC 3672, 3675-9)	Monroe	4.5%
<b>Targeted Supplier Industry: 51.0103 Electronic computers (SIC 3571)</b>	<b>Customer Location</b>	<b>Typical Share of Supplier Purchases</b>
Customer Industries		
51.0104 Computer Peripheral Equipment (SIC 3572, 3575, 3577)	Monroe	6.9%
56.0300 Telephone and Telegraph Apparatus (SIC 3661)	Monroe	1.4%
57.0300 Other Electronic Components (SIC 3672, 3675-9)	Monroe	3.5%
73.0104 Computer and Data Processing Services (SIC 7371-9)	Erie, Monroe	5.3%

### **c) Existing Business Centers**

Cattaraugus County Empire Zone: The Cattaraugus Empire Zone is approximately one square mile in area, located primarily on the north side of the City of Olean, with additional property in the Town of Allegany and at other locations in Olean. The zone was created in 1987 as one of the first ten Empire Zones in the State.

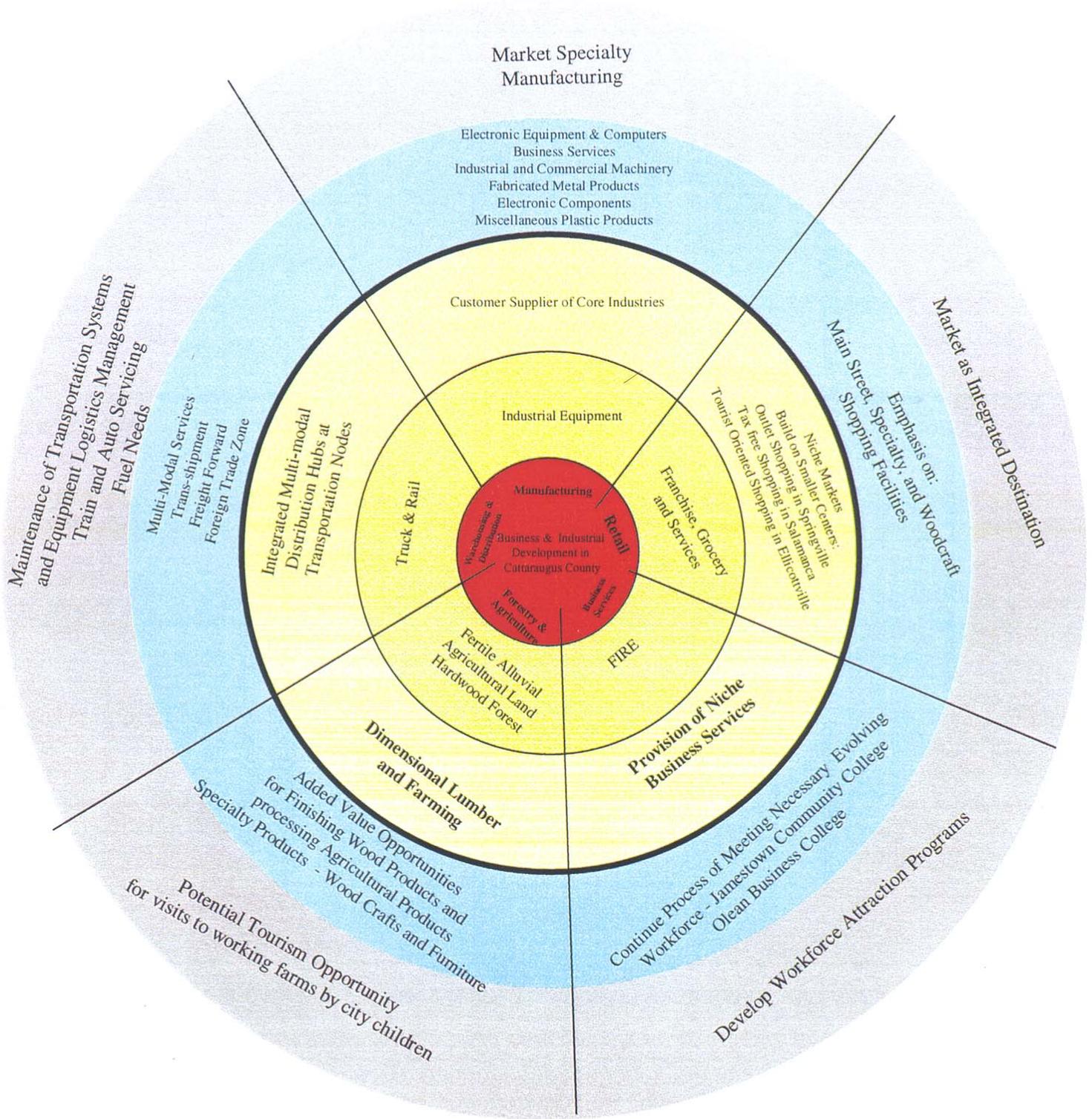
The CEZ has certified over 60 businesses. These businesses have created over 550 new jobs and invested in excess of \$240 million. Successful private projects include major manufacturing expansions, a co-generation plant, retail and other commercial projects, the Olean General Hospital's Dialysis Center, and a 75-room Hampton Inn Hotel in the downtown area.

The largest single project developed in the CEZ is the 156-acre Constitution Commerce Park. This \$2 million dollar project, located along a former railroad right-of-way, was dedicated in the fall of 1995. Since that time, ten projects have located within Constitution Commerce Park and three more are currently under development.

West Valley Nuclear Facility: NYSERDA manages the Western New York Nuclear Service Center, the site of a former nuclear fuel reprocessing plant and a shutdown low-level radioactive waste disposal area. The site is located on 3,340 acres of State-owned land, approximately 30 miles southeast of Buffalo, near West Valley in Cattaraugus County. As manager of the Center, NYSERDA represents New York State in the U.S. Department of Energy's West Valley Demonstration Project and maintains the remainder of the site, including the disposal area.

In outlining the economic potential of Cattaraugus County, a 'wheel diagram' has been prepared to depict the Business and Industrial possibilities available. This diagram is divided into sections on tourism, retailing, business services, forestry and agriculture, warehousing and distribution, and manufacturing. It should be read from the middle out, to follow the possibilities within each sector as they are developed. (See Chart 2, Industrial and Business Market Segment Projects)

Chart 2 - Business & Industrial Market Segment Projects



#### **d) Proposed Industrial and Business Demonstration Projects**

As the next step in pursuing the potential for development in the business services, manufacturing, warehousing and distribution sectors (as outlined in Chart 2, Industrial and Business Market Segment Projects) a number of industrial and business demonstration projects have been proposed to provide a land base to accommodate the targeted sectors. These projects have been developed with a view to capitalizing on the potential for economic expansion that will be generated with the construction of the Freeway Alternative. The ten business demonstration projects indicate, for business recruitment purposes, the specific kinds of enterprises that could be attracted to the vicinity of the Park, whether industry or tourism related. The outline of these projects serves to offer Cattaraugus County's recruitment efforts a clear focus as to the kinds of businesses that should be pursued in the future, and the local sites that may be included in these regional marketing endeavors.<sup>18</sup>

In order to encourage such development, Cattaraugus County has been establishing a program to promote new potentials by providing business development services and information for communities located within the Route 219 corridor – Ashford, Ellicottville, Great Valley, Salamanca, Limestone and the Onoville Marina/South Valley areas. The objective is to assist investors and local officials to carry out advance planning over the next several years in relation to the proposed Freeway Alternative.

It must be noted that public sector improvements will be necessary to facilitate the successful implementation of the Proposed Demonstration Projects as outlined. The projects as summarized in this Study include revised and newly proposed Demonstration Projects for industry and tourism. (See Map 5 – Proposed Industrial and Business Demonstration Projects)

# Economic Demonstration Projects

MAP 5

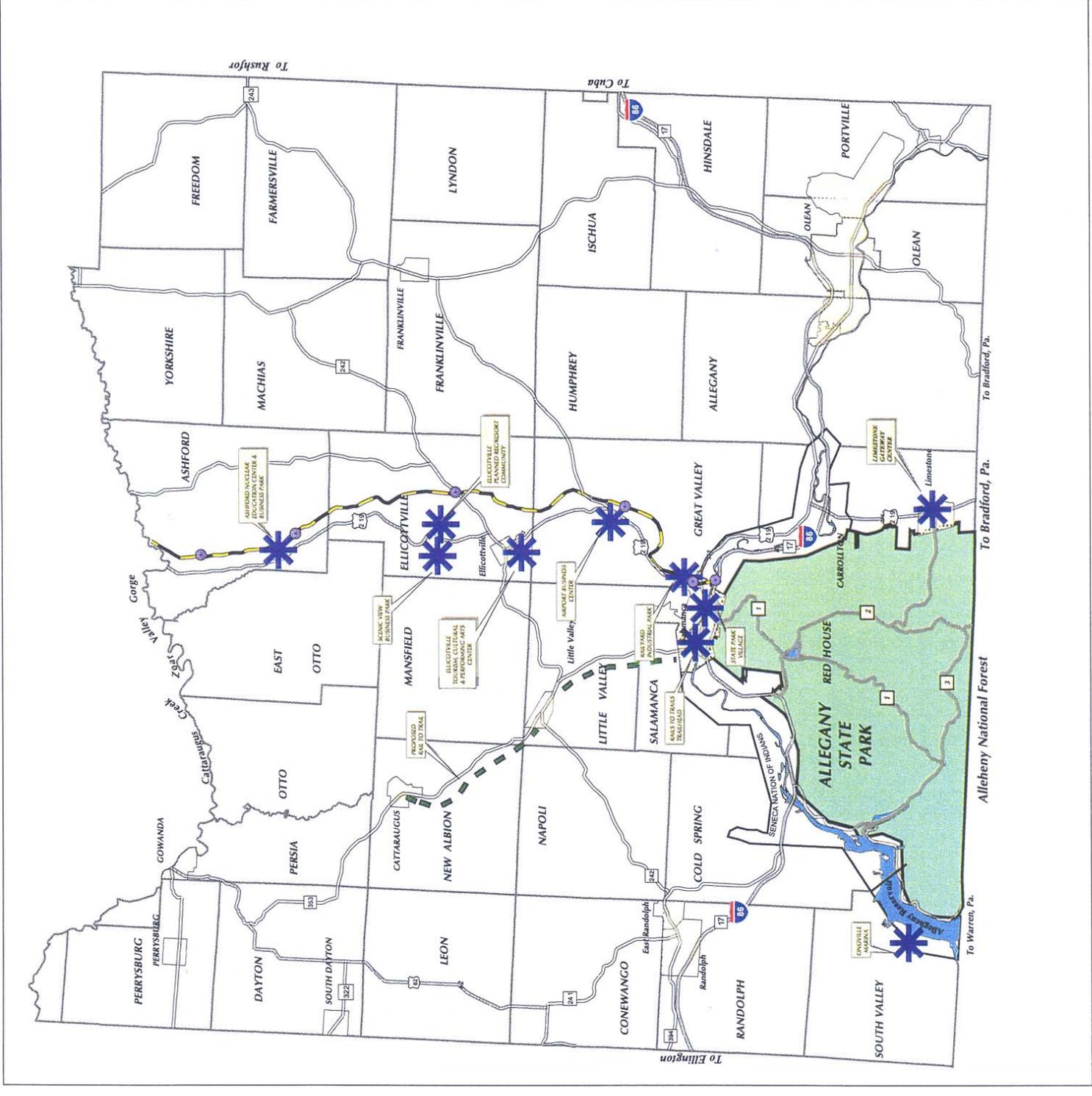
-  ECONOMIC DEVELOPMENT PROJECT
-  U.S. ROUTE 219 FREEWAY ALTERNATE
-  PROPOSED INTERCHANGE
-  SOUTHERN TIER EXPRESSWAY
-  U.S. HIGHWAYS
-  STATE HIGHWAYS



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 SARATOGA SPRINGS, NEW YORK CITY AND BOSTON

**Allegheny State Park  
 Perimeter Study**

Cattaraugus County



### 1. Ashford Business Center:

West Valley, in the Town of Ashford, is the site of one of the world's most significant nuclear processing facilities, where nuclear waste products are effectively stabilized and transformed through technology. The Ashford Office Complex, in nearby Ashford Hollow supports this facility by providing space for the Department of Energy and its contractors. While the site for the proposed business center is as yet unconfirmed, it is proposed that the existing development would form the core of the proposed development – a campus that would provide a nuclear education visitor center, and college-affiliated training facilities for area businesses. An on-site business incubator would encourage business development related to ongoing research, and new office and light industrial space would provide room for new business to grow. The proposed Nuclear Education Center would include interactive displays that explain the history and use of nuclear power, with a strong focus on the processes being used at West Valley to deal with the challenges of nuclear waste. A large alternative site may become available in the vicinity of the proposed business center. It is recommended that this situation be monitored, as this site would allow for substantial expansion of the proposed center.

It is estimated that the square footage (sf) requirements for this project would be allocated over three phases of development. Phase I would require 6,000 sf of office space, 12,000 sf of warehouse and distribution space, 15,000 sf of flexible office/warehouse space and 15,000 sf of business incubator space. Phase II would require 20,000 sf of office space, 40,000 sf of warehouse distribution space, 40,000 sf of assembly/light manufacturing space, 15,000 sf of flexible office/warehouse space, 20,000 sf of business incubator space, and 3,000 sf of day care facility space. The final phase, Phase III, would require a further 5,000 sf of office space, 40,000 sf of flexible office/warehouse space and 15,000 sf of business incubator space. The total land required would be between 110 and 140 acres.

### 2. Ellicottville Planned Recreation/Resort Community in Ellicottville:

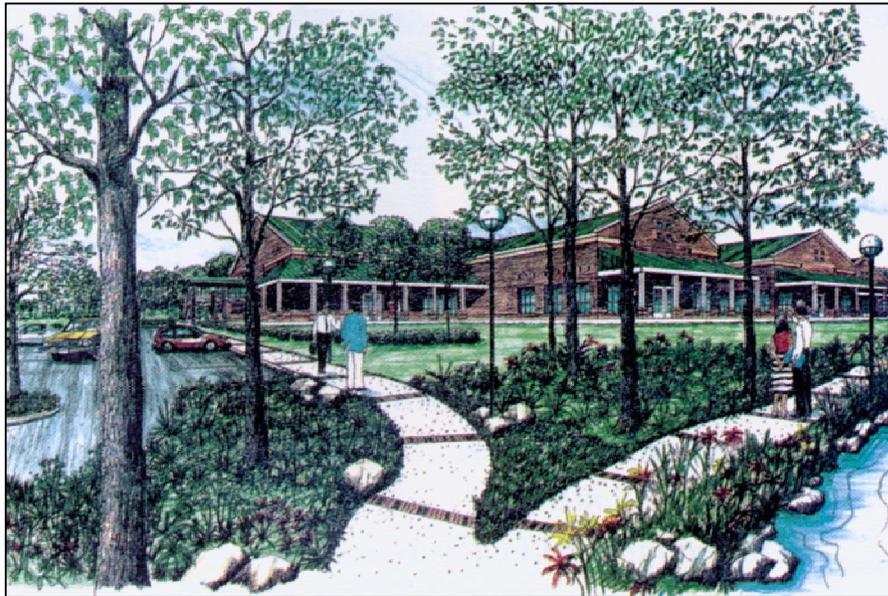
This project is still at the preliminary planning phase. It is outlined for information purposes, but will not be recommended for development without community participation, consensus and support. The premise of the proposed project is that, although there is an abundance of ski-related vacation home development in the Ellicottville area, the purpose of this project would be to expand the variety of such residences by providing a mix of recreational themes. The project would include a mix of single and multi-family residential units around recreational amenities including a regulation golf course and club house, tennis courts, swimming pool, equestrian trails and possibly a natural lake or man-made reservoir. This project

also includes a small business park component to encourage business development in conjunction with a resort community lifestyle. Community consensus would also be required in terms of site choices.

### 3. Ellicottville Scenic View Business Park:

The Ellicottville Scenic View Business Park is a proposed 250-acre industrial and professional park. This project capitalizes on the community's reputation as young, active and sophisticated to attract young investors who maintain an active lifestyle. Surrounding recreational amenities include skiing, golf, tennis, hiking and increasing summertime activities include mountain biking. The project would include a regulation golf course, and single and multi-family residences to encourage business development in conjunction with a resort community lifestyle.

#### Landscaped Business Park:



While the site for this proposed project is as yet unconfirmed, its potential success will be increased by a location in the vicinity of Ellicottville, where residents could take advantage of existing recreation and entertainment amenities. The site would ideally offer natural vistas, preferably along an as yet undeveloped, proposed water body. It has potentials for manufacturing, business parks and warehousing creating between 185 and 240 jobs in Phase I of the development.

The housing component of this project will require 300 single-family units and 250 multi-family units, to be constructed in two phases. The business component will require approximately 20,000 sf of research and development space. The recreation component will require an as yet undetermined amount of acreage, but it is anticipated that the entire project will require a total area of approximately 800 to 1000 acres.

#### 4. Ellicottville Community Tourism and Cultural Centers:

Amphitheatre



This project has been revised somewhat, in terms of scale and location. Although the services provided have been expanded upon, the basic premise of the proposal remains the same. In essence, an opportunity exists for expanded entertainment facilities in Ellicottville for the generation of summertime recreation. As stated above, a tourist information center would serve as the anchor for general entertainment projects, forming a multi-use complex that could include tourist-oriented attractions such as cultural/performing arts center, cinema, specialty retail shops for arts and crafts and antiques, and connections to regional biking and hiking trails. The complex could also serve as a location for a community resource center and/or municipal offices. The location for this proposed development is as yet unconfirmed.

This development program will require a minimum of 2,000 sf for a tourist information center, 2,000 sf for an interpretive center, a 3000 to 5000-seat performing arts center, and 32,000 sf of artist studios and shop space. The total land requirement will be approximately 80 to 100 acres.

#### 5. Airport Industrial Park:

The Airport Business Center is a proposed 65-acre office and industrial park that would offer business development opportunities integrated with the proposed new Cattaraugus County airport adjacent to Route 219. The plan has been laid out with 35 half-acre development parcels, which may be combined to form lots as large as 10 acres. The proposed site has space for a 6,000-foot runway, and future expansion of on-site business operations. Over fifty percent of the Business Park will enjoy direct access to taxiways and the runway, which, when coupled with direct highway links to the Route 219 interchange in Great Valley and Route 353 in Little Valley and Salamanca, would result in unique multi-modal transportation options. The Business Center could accommodate office, research and development, light manufacturing, and air transit related warehousing/distribution facilities. It is estimated that up to 500 new jobs would be created by this development over a twenty-year period. Cattaraugus County has approved environmental studies for this project, but has also voted not to begin construction for the foreseeable future.

The gross land requirement for site development is estimated to fall between 30 and 40 acres. This area would be broken down into approximately 10,000 sf of office space, 32,000 sf of warehouse and distribution space, 12,000 sf of light manufacturing/assembly space, and 12,000 sf to be devoted to research and development.

#### 6. Great Valley Railyard Industrial Park (Cattaraugus County Crossroads (Rtes 219/I-86)):

There are two components to this project located at the intersection of two regionally important transportation corridors, Route 219 and the Southern Tier Expressway (I-86) will open Southern Cattaraugus County to regional traffic creating an opportunity for office, light manufacturing, warehousing and inter-modal distribution uses that capitalize on this unique interstate crossroads location. The associated increase in the volume of transient travelers will create a market for highway based commercial services such as hotel/motel accommodations, restaurants, and niche retailing.

The interchange will create a highly desirable development site, opening up two development locations for a Cattaraugus County Business Center (one on the north side of the Allegheny River, and the other on the south side). The northern site is the proposed Railyard Industrial Park, which would be oriented toward light industrial and distribution uses. The southern site is the proposed Western Door Commerce

Center. At the request of the Seneca Nation, the southern site project proposal is not developed in this study. It may be developed in the future at the prerogative of the Seneca Nation. The location of the proposed business center in relation to the intersection of Route 219 and Route I-86 will be a critical factor in the success of the project.

The Railyard Industrial Park will be developed on the site of a former rail yard. The site enjoys excellent highway access and existing rail service. Located in the Town of Great Valley, it is adjacent to the City of Salamanca and the Seneca Nation’s Allegany Reservation. The City of Salamanca has excess sewer, water and municipal electric capacity, and may be engaged in a development partnership with both the County and the Town. In addition, Salamanca maintains a small industrial park on Morningside Avenue that may be incorporated into this development. The proximity of the proposed site to the Seneca Nation provides an opportunity for Seneca investment in a business development of regional importance.

In summary, the project could potentially serve to expand the economic base, leverage infrastructure investments, and focus on incremental benefits at corridor locations where development activities tend to cluster. This project is discussed in greater detail in **Section D, Part 2, g, Gateway Center for Industrial/Warehousing Development.**

Image of a Railyard-based Industrial Park:



#### 7. Limestone Gateway Center:

The Allegany State Park and the Village of Limestone comprehensive plans proposed development of an improved entrance to the Park from existing Route 219 in Limestone. The entrance would establish

Limestone as an important ‘eastern gateway’ to the Park for visitors traveling north from Pennsylvania. As the first populated community along Route 219 that lies within New York State, the Village of Limestone has the potential to become an important Gateway Community to New York State. The community proposes the development of supporting activities and services to welcome travelers to the state, direct visitors to the Park, and encourage them to patronize local services in Cattaraugus County (for example, the City of Salamanca). Program items include a Welcome Center, offering tourist information and local history, motel accommodation, restaurant facilities, a convenience store, gas and automobile services.

The plan has been expanded to include the development of a Recreational Sports Vehicle Center in Limestone, acting not only as a recreational resource, but as a service center along the 219 corridor, catering to the all-round needs of recreational sports vehicle enthusiasts. The center would be supported by accommodation, entertainment, and dining facilities. It is further envisaged that, during the winter season, Limestone would become a general service center for snowmobilers along Route 219. The Village already has a moderate role in this respect, and TSA proposes that Limestone build on this foundation to establish Limestone as a magnet for snowmobilers. A long-term storage facility for up to thirty snowmobiles is also planned. Limestone represents the optimum location for such a center due to its existing links to snowmobile trails throughout the Park. As part of the proposal package, it is recommended that these trails be reorganized and extended both within the Park and beyond. This project is discussed in greater detail and with appropriate maps in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects.**

#### 8. City of Salamanca State Park Village:

The eastern section of Salamanca is proposed for development as a State Park Village, containing such tourism-oriented amenities as a tourist information center, guest accommodations, restaurants, family entertainment facilities and an interpretive center. Two sites have been identified as the potential location for the proposed State Park Village – the abandoned Hospital lot west of Parkway Drive, and a series of vacant and residential lots, south of East Race Street. These sites are in the immediate vicinity of Interstate 86, Exit 21, and are easily accessible from Allegany State Park by Parkway Drive. Both are served by City water and sewage services, and have relatively few development constraints. This project is discussed in greater detail and with appropriate maps in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects.**

9. City of Salamanca Trail Head:

Salamanca has been selected as the location for the snowmobile trailhead, since it connects to a large-scale regional network of trails. The importance of this role as the nexus of the County’s trail system was also emphasized by the ‘Hubs and Connections’ study. The bridge that traverses the Allegany River is due for renovation by the NYS Department of Transportation. It is proposed that the new bridge be equipped with a separate, purpose-designed lane specifically for the use of snowmobilers. This lane would of great assistance in terms of avoiding potentially troublesome lane sharing and also retaining and cementing Salamanca’s position as trailhead. This project is discussed in greater detail and with appropriate maps in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects.**

10. Onoville Marine Park:

This site was originally chosen as the optimum location for the marina due to its scenic value, and its development potential as a water-based facility. It has been selected for further development at this point due to its strategic location close to the perimeter of the Park, and because it is a County-leased site, avoiding competing and contradictory interests in terms of development. The Project entails the construction of better-equipped RV campsites and up-market cabin developments. It may also be possible to extend the area’s current season with the promotion of winter sports and fall foliage visits. Additionally, the timing of the reservoir draining may be changed, in consultation with, and at the discretion of, the United States Army Corps of Engineers. It is unlikely that private sector concerns would be willing to back any substantial development without the extension of the existing season. This project is discussed in greater detail and with appropriate maps in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects.**

A summary of Cattaraugus County’s Economic Development Projects, including existing, previously proposed, revised and newly proposed projects, may be easily analyzed in matrix form. This matrix lists the development projects and their respective potentials in terms of job creation, warehousing and distribution, as inter-modal centers, as light assembly manufacturing units, as tourism services, as office services centers and for the generation of support services. (See Table 8 – Unmet Market Opportunities Matrix)

Table 8 – Unmet Market Opportunities Matrix

Projects:	Job Creation Estimates	Warehousing & Distribution	Inter Modal Center	Light Assembly	Office Svcs	Tourism Svcs	Support Svcs	Accom*
Ashford Business Center	210-300	X		X	X		X	
Ellicottville Planned Recreation/ Resort Community	N/A				X	X	X	X
Ellicottville Scenic View Business Park	185-240	X		X	X		X	
Ellicottville Community Tourism and Cultural Center	210-270				X	X	X	
Airport Business Center	500	X	X	X	X		X	
Limestone Recreational Sports Vehicle Center	233					X	X	X
Railyard Industrial Park	255-345	X	X	X	X		X	
City of Salamanca State Park Village	681					X	X	X
City of Salamanca Trail Head	N/A					X	X	
Onoville Marine Park	250					X	X	X
<b>**Total Job Creation Estimates</b>	<b>2524 - 2819</b>							

\* This refers to all accommodation, including both residential and tourist accommodation;

\*\* These estimates are based on the assumption that the Freeway Alternative will take place, and may be amended in future studies based on such factors as site selection and scope of development.

## 2. Tourism Development Potential

### a) Targeted Market Sectors

In addition to the active pursuit of growth in the manufacturing and commercial sectors of the Route 219 International Trade Corridor, the development of a strong tourism industry should be a targeted area for economic growth. The primary focus of this effort should be to diversify and expand the existing market, by means of developing facilities to enable the region to attract increased numbers of tourists and to capture greater value from the existing market. (See Table 9, Cattaraugus County Tourism Expenditures, 1991 through 1999)

<b>Table 9: Cattaraugus County Tourism Expenditures, 1991 through 1999</b>					
<b>Year</b>	<b>Hotel</b>	<b>Transport</b>	<b>Food</b>	<b>Shopping</b>	<b>Entertainment</b>
<b>1991 - 1992</b>	\$4,117,000	\$2,118,437	\$5,125,017	\$3,870,456	\$2,754,211
<b>1992 - 1993</b>	\$4,066,000	\$2,092,195	\$5,061,530	\$3,822,510	\$2,720,093
<b>1993 - 1994</b>	\$5,161,000	\$2,655,637	\$6,424,633	\$4,851,936	\$3,452,632
<b>1994 - 1995</b>	\$5,062,000	\$2,604,695	\$6,301,393	\$4,758,865	\$3,386,402
<b>1995 - 1996</b>	\$6,259,000	\$3,220,622	\$7,791,470	\$5,884,183	\$4,187,177
<b>1996 - 1997</b>	\$7,297,000	\$3,754,734	\$9,083,617	\$6,860,023	\$4,881,584
<b>1997 - 1998</b>	\$7,481,000	\$3,849,412	\$9,312,668	\$7,033,004	\$5,004,677
<b>1998 - 1999</b>	\$8,626,000	\$4,438,582	\$10,738,012	\$8,109,437	\$5,770,665

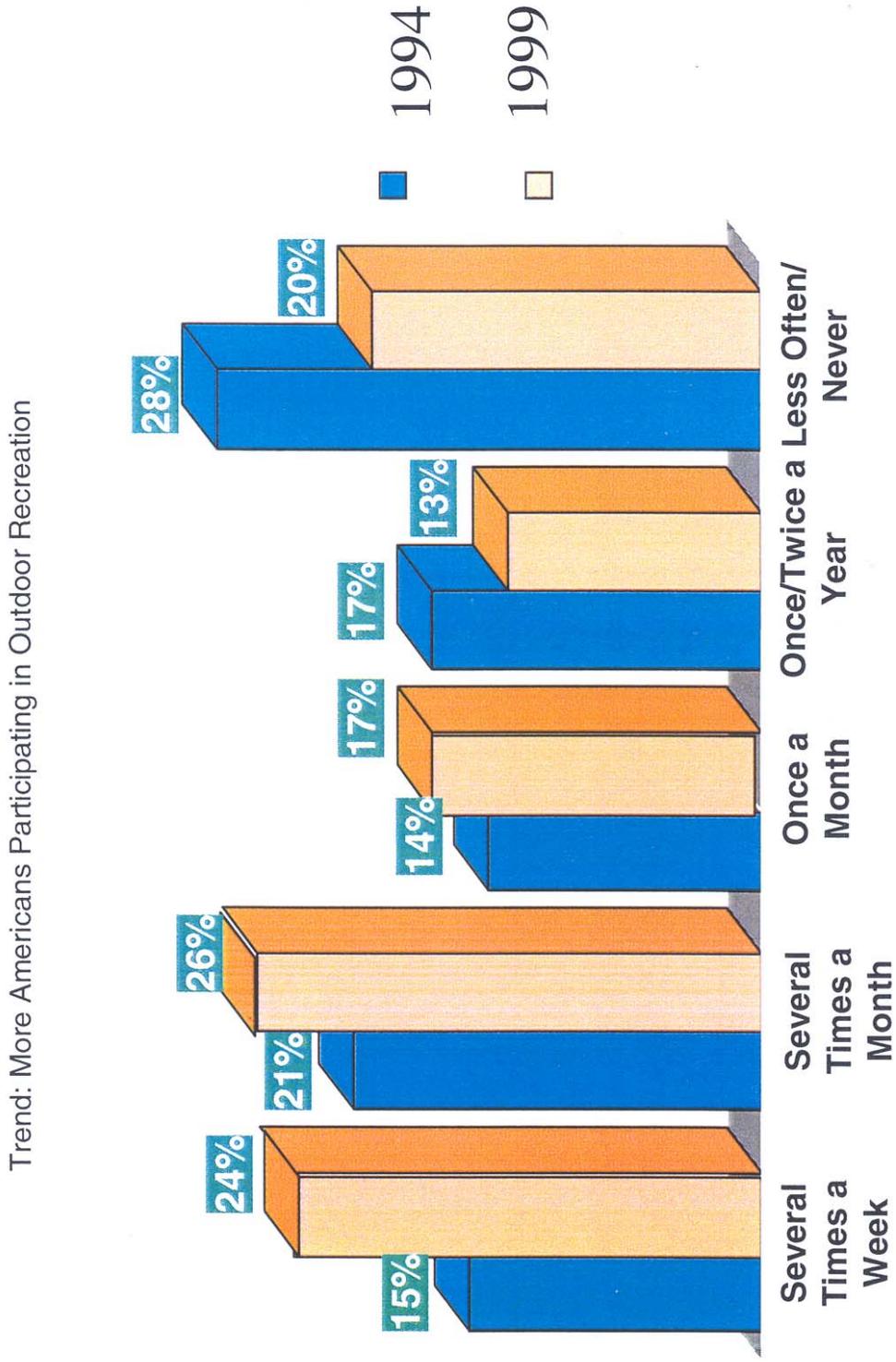
The 'Hubs and Connections' study indicates that tourism is a growth industry in the region, with even greater potential to contribute to the regional economy.<sup>19</sup> During the period 1988 to 1996, tourism employment in Cattaraugus County increased by more than one-third, compared to a 1.6 percent decline

in overall employment. By taking advantage of Cattaraugus's unique rural and cultural settings and establishing linkages to key tourism-generating sites, the County can enhance its economy as a whole. The strength of the County's tourism industry, combined with growing national interest in outdoor recreation and adventure tourism highlights the economic development potential for the Allegany State Park region.

According to studies conducted by the Travel Industry Association, more than half of all U.S. adults (98 million travelers) took an adventure vacation in the last five years. On average, adventure travelers have participated in three different 'soft' adventure activities in the last five years. The top soft adventure categories were camping, with 64.7 million participants, hiking on gradually changing terrain, with 44.8 million participants, and biking, with 27.2 million participants. 'Hard' adventure travelers concentrated on such activities as whitewater rafting/kayaking, with 14.8 million adults participants, snorkeling/scuba diving, with 12.4 million participants, and off-road biking, with 2.7 million participants.

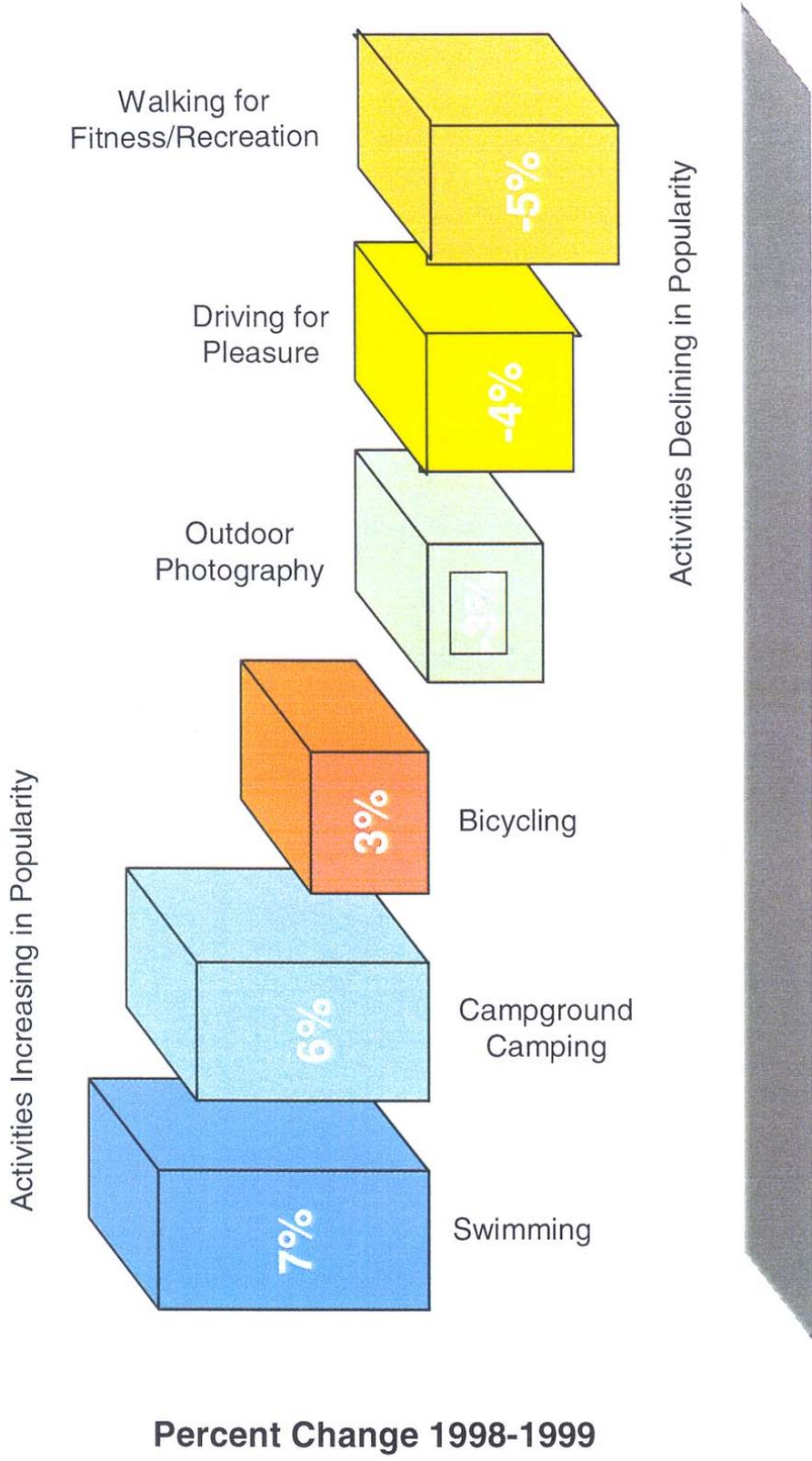
A study entitled 'Outdoor Recreation in America' was conducted in 1999. In the course of this study, 2,000 qualitative interviews were conducted with American adults, and the results of these interviews analyzed. The study found that increasing numbers of Americans are participating in outdoor recreation on a monthly basis, with numbers increasing steadily since 1994, and rising even more steeply since 1998. While the overall numbers participating frequently in outdoor activities has risen significantly, there have been few changes in the specific activities chosen. It was found that participation rates in fishing were at 28% - representing an increase of 6% on 1998 figures. Participation rates in 'adventure' sports, including mountain biking and snowmobiling, were also up. Mountain biking increased from 4% to 6%, indicating a 50% increase in participation levels over a one-year period. Snowmobiling participation also increased from 1% to 3%, representing an extremely significant 200% growth level on 1998 figures. Other recreational activities, including boating, rowing and water-skiing, have also increased in popularity.<sup>20</sup> Two charts have been prepared illustrating these shifts in both the frequency with which Americans participate in outdoor recreation, and the recreation options they pursue. The charts are useful in that they clearly depict the changes that have occurred in recent years. (See Chart 3, Frequency with which Americans Participate in Outdoor Recreation, and Chart 4, Changes in Recreation Participation)

Chart 3 - Frequency with which Americans Participate in Outdoor Recreation



Source: The Recreation Roundtable, Outdoor Recreation in America: The Family and the Environment

Chart 4 - Changes in Recreation Participation



Percent Change 1998-1999

Source: The Recreation Roundtable, Outdoor Recreation in America: The Family and the Environment

With the variety of activities involved, spending on adventure tourism varied widely among travelers. ‘Hard’ adventure travelers spend more than ‘soft’ adventure travelers – \$465 versus \$325 per trip. Among ‘soft’ adventure travelers, the most attractive market segments are older adults, with a median expenditure of \$390 per trip, people living in the Northeast, with a median expenditure of \$450 per trip, and upper income households, spending \$441 per trip. The Allegany State Park region has the attractions to draw increasing numbers of such travelers, and the creation of appropriate complementary facilities should enable the region to reap substantial benefits from such activity.

Positioning Allegany State Park in the Regional Tourism Market: In order for the region to take advantage of trends in tourism, the Park and complementary activities must be configured to tap into the most lucrative segments of that market. Consequently, our analysis is intended to identify those geographic market areas that have a relatively high proportion of high-income households engaging in vacation activities that can be supported in the Allegany State Park region, that is ‘rest or relaxation’, ‘sightseeing’, ‘outdoor recreation’ and ‘entertainment’. It is important to note that one of the most common reasons given for household vacation trips is to ‘visit family or friends’. While this is an important vacation activity, the trip itself is a function of the location of each household’s network of family and friends, and is less likely to be influenced by the offerings at a particular tourist destination.

Table 10 provides an overview of national travel trends based upon data from the 1995 American Travel Survey, conducted by the US Department of Transportation’s Bureau of Transportation Statistics. The table displays information in the four categories of destination-related vacation travel identified above. (See Table 10, Household Trips by Type, 1995)

<b>Table 10: Household Trips by Type, 1995.</b>		
		<b>Percent of trips by Households Earning over \$100,000</b>
Total Number of Household Trips	319,857,645	9.1%
	% of Total	
Rest or relaxation	19.3%	10.9%
Sightseeing	8.0%	9.5%
Outdoor recreation	10.4%	12.2%
Entertainment	8.4%	9.6%

Source: compiled by the Saratoga Associates from US Bureau of Transportation Statistics, 1995 American Travel Survey, Household Trip Data Files.

Table 10 shows the number of vacation-related household trips made in 1995, categorized by the reason for that trip. Household trips are all of the trips made by all households – that is, if one household makes ten trips, then that constitutes ten household trips. Similarly, ten households, each of which make one trip, also equals ten household trips.

Table 10 also indicates the percentage of trips in each category that were made by households with annual incomes in excess of \$100,000. 320 million household vacation trips were made in 1995, of which 9.1 percent were made by households with a per annum income of greater than \$100,000. Note that ‘rest or relaxation’ trips account for 19.3% of all vacation trips, but only 10.9% of household trips by those earning over \$100,000. These upper-income households are more likely to take trips for outdoor recreation, sightseeing and entertainment when compared to other household types. (See Table 11: Geographic Distribution of High-Income Household Trips by Type of Vacation Trip, 1995)

**Table 11: Geographic Distribution of High-Income Household Trips by Type of Vacation, 1995.**

**Large MSAs\*\***

		Percentage of trips by Households Earning over \$100,000	MSAs with High Concentration of Trips by High Income Households for that Trip Category
Total Number of Household Trips	8,536,611	7.3%	
	% of Total		
Rest or relaxation	21.2%	5.5%	Pittsburgh (8.3%)
Sightseeing	9.8%	7.6%	Buffalo (19.0%)
Outdoor recreation	8.3%	12.1%	Syracuse (39.1%), Cleveland (28.8%)
Entertainment	8.9%	7.1%	Buffalo (17.3%), Rochester (7.3%)

\*\*The 'Large MSAs' include Buffalo-Niagara Falls NY, Cleveland-Lorain-Elyria OH, Pittsburgh PA, Rochester NY, and Syracuse NY.

**Smaller MSAs\***

		Percentage of trips by Households Earning over \$100,000	
Total Number of Household Trips	2,942,363	6.9%	
	% of Total		
Rest or relaxation	16.2%	3.6%	
Sightseeing	8.6%	3.6%	
Outdoor recreation	8.7%	4.4%	
Entertainment	13.6%	2.5%	

\*The 'Small MSAs' include Akron OH, Binghamton NY, Canton-Massillon OH, Erie PA, Scranton-Wilkes Barre-Hazleton PA, and Youngstown-Warren OH MSA.

Source: compiled by the Saratoga Associates from US Bureau of Transportation Statistics, 1995 American Travel Survey, Household Trip Data Files.

Table 11 examines vacation travel within the metropolitan statistical areas (MSAs) in the Western-New-York, Western-Pennsylvania, Eastern-Ohio region. The table groups the MSAs by size. Large MSAs include Buffalo-Niagara Falls, NY; Cleveland-Lorain-Elyria, OH; Pittsburgh, PA; Rochester, NY; and Syracuse, NY. Examples of small MSAs include Akron, OH; Binghamton, NY; Canton-Massillon, OH; Erie, PA; Scranton-Wilkes-Barre-Hazleton, PA; and Youngstown-Warren, OH.

It should be noted that the small MSAs do not have concentrations of high-income households involved in these types of vacation travel. The high-income households in these smaller MSAs tend to take vacation trips to visit family and friends. The larger MSAs, however, do contain concentrations of high-income households involved in each of the four categories of destination-related vacation travel.

Pittsburgh, with 8.3% of all ‘rest and relaxation’ trips generated by its upper-income households, has a high concentration of upper income household trips related to ‘rest and relaxation’. In the combined household trips for the larger MSAs, households earning over \$100,000 account for only 5.5%.

Similarly, the Buffalo MSA has a high concentration of upper income household vacation trips related to sightseeing. In that MSA, upper income households make 19 percent of all such trips. On the other hand, when all of the larger MSAs are combined, upper-income households account for only 7.6 percent of such ‘sightseeing trips’. This indicates that the market for sightseeing among households in the Buffalo MSA produces a greater concentration of upper-income households than does the overall market for sightseeing among the large MSAs taken as a whole. This suggests that efforts to develop a high-end market for sightseeing in Allegany State Park should be targeted at the Buffalo MSA.

The data in Table 11 also suggests that Syracuse is the most favorable target market for generating a high-end market in outdoor recreation, based on the fact that 39% of outdoor recreation type vacations are taken by households with an income in excess of \$100,000. The Cleveland MSA, where 28.8% of outdoor recreation trips are made by high-income households, may also be a potential source for developing the high-end market for outdoor recreation in the vicinity of Allegany State Park.

## b) Identifying Geographic Focus Areas for Marketing Efforts

Table 12 presents the summary results of this analysis. For each of the four categories of destination-related household-trips, it identifies those MSAs that are most likely to be the source of upper-income household trips. Thus, it provides a geographic focus for the efforts to develop high-income market segments in each of these vacation-related activities. (See Table 12, Potential Target Markets by Type and Geography)

<b>Table 12: Potential Target Markets by Type and Geography</b> (Types of Trips with High Concentrations of High Income Households by Geographic area)	
Type of Activity:	Geographic Area:
Rest or relaxation	Pittsburgh
Outdoor recreation	Syracuse, Cleveland
Sightseeing	Buffalo
Entertainment	Buffalo, Rochester

## c) Existing Regional Tourism Resources

In addition to Allegany State Park, which is discussed in detail in **Section B, Part 3, Allegany State Park**, there are over 40,000 acres of publicly accessible State and County-owned land, which offer hunting, camping and hiking opportunities, within Cattaraugus County.

Cattaraugus County is home to hundreds of miles of streams, rivers and lakes for boating, canoeing and fishing activities. Cattaraugus Creek and the South Branch of Cattaraugus Creek in northern Cattaraugus County, the Allegheny Reservoir and Allegheny River surrounding the State Park, and the Oil and Ischua Creeks in eastern Cattaraugus County offer more than 230 miles of accessible waterways for canoeing and fishing. The Zoar Valley is known nationally for its Class III and IV whitewater paddling, while the New York State fish hatchery in Randolph is the State's only gravity-fed hatchery.

Several public and private golf courses with adjacent campground accommodation operating seasonally are located within the Allegany State Park Perimeter Zone.

The 400-acre Griffis Sculpture Park in Ashford Hollow has a collection of over 200 outdoor sculptures by prominent local, national and international artists. The Nannen Arboretum, located along Route 219 in the Village of Ellicottville, displays over 260 different rare and unusual species of trees. The privately owned 2,900-acre Rock City Park in the Town of Allegany is a popular destination composed of unique towering rock formations. There are numerous walking trails through these natural sculptures.

Several wildlife refuges, sanctuaries and other natural resource interpretive centers are located in the County including the 188 acre Pfeiffer Nature Center in Olean, the 390 acre Allenberg Bog Wildlife Refuge near Little Valley, and the 398 acre Deer Lick Nature Conservancy near Gowanda. A new nature center is currently under development in the town Napoli called the James A. Zaefel Nature Preserve and Research Center.

Nestled in the southwestern corner of the County is Amish Country, home to the Old Order Amish. This is the largest settlement of its kind in New York State, offering a unique perspective of the Amish culture. Visitors can enjoy the many summer festivals and shop at the numerous retail establishments selling handmade Amish quilts, furniture, toys and antiques.

Cattaraugus County also offers numerous family-oriented attractions such as Pumpkinville, a family owned and operated pumpkin farm in the Town of Great Valley. The Seneca-Iroquois National Museum in Salamanca houses Native American artifacts and provides an interpretation of prehistoric and contemporary life of the Seneca and Iroquois. The museum gift shop is a major outlet for Iroquois crafted goods. Salamanca is also the site of the Railroad Museum, an attraction that offers year-round appeal to railroad aficionados and families.

Another popular family destination is the Cattaraugus County Fair Grounds, located in the Town of Little Valley. In addition to the County Fair, which takes place during the first week of August, the fairgrounds hosts events throughout the summer months, including equestrian, sportsman and antique shows, and the Empire Super Sprint Car series races.

In addition to the amenities cited above, the County hosts a vast assortment of events throughout the year. These events are summarized in the Table 13, Cattaraugus County Events Attendance by Location.

<b>Table 13: Cattaraugus County Events Attendance by Location, 1999-2000</b>	
<b>Allegany State Park:</b>	
Red House Area	792,000
Quaker Area	<u>648,000</u>
	<b>1,440,000</b>
<b>Ellicottville:</b>	
Holiday Valley Resort	650,000
Ellicottville Area Activities	250,000
Ellicottville Rodeo	12,000
Nightmare Hayrides	12,000
Nannen Arboretum	<u>3,000</u>
	<b>927,000</b>
<b>Salamanca:</b>	
Seneca Nation Bingo	76,000
Pow Wow	20,000
Falling Leaves Festival	15,000
Seneca Iroquois National Museum	10,000
Rail Museum	<u>9,000</u>
	<b>130,000</b>
<b>Great Valley:</b>	
Pumpkinville	100,000
Push's Cider Mill	12,000
25 <sup>th</sup> Annual Great Valley Fireman's Regatta	<u>4,000</u>
	<b>116,000</b>
<b>Little Valley:</b>	
Cattaraugus County Fair	100,000
Springfest	<u>1,200</u>
	<b>101,200</b>

Olean:	
Hottest Weekend	24,000
Santa Claus Lane	20,000
The History Channel Great Race	9,500
Johnny Appleseed Festival	<u>8,000</u>
	<b>61,500</b>
Franklinville:	
WNY Maple Festival	<b>50,000</b>
Gowanda:	
2 <sup>nd</sup> Annual Harley Happening	<b>25,000</b>
Ashford Hallow:	
Griffis Sculpture Park	<b>20,000</b>
Allegany/Olean:	
Rock City Park	<b>15,000</b>
Randolph:	
Annual Arts and Crafts Show	4,000
Country Christmas and Festival of Trees	<u>4,000</u>
	<b>8,000</b>

Source: Cattaraugus County Department of Economic Development, Planning & Tourism, 2000

While a certain percentage of those who attend these events are likely to be County residents, this level of attendance at County events indicates the presence of a large tourist market. Another promising aspect of these figures is that the events as outlined are year-round. This indicates that tourists can be attracted into the County for events during every season, not merely for camping in the summer and snow sports in the winter. The next step for the County is to provide the facilities and attractions to encourage these visitors to prolong their stay and generate revenue in the region.

### Trail Connections:

The majority of the destinations mentioned previously are accessible via the network of hiking, biking and snowmobile trails that traverse the county.

Hiking Trails: Two regional hiking trails traverse the county: the North County Trail and the Finger Lakes Trail. The North County Trail system begins along Lake Champlain and ends 4,000 miles to the west, at Lake Sakakawea in North Dakota. The trail is open to hiking, biking, jogging, backpacking, cross-country skiing, and snowshoeing. A portion of the North County Trail meanders through Allegany State Park, where it leaves the county and enters Allegheny National Forest in Pennsylvania. The North County Trail is integrated with the smaller Finger Lakes Trail for approximately 390 miles, many of which meander through Cattaraugus County.

The Finger Lakes Trail, which links the Southern Tier of New York State with the Long Path found in the Catskills Mountains, is primarily a hiking trail. Certain segments of the trail, however, are also suitable for seasonal cross-country skiing and snowshoeing. A major extension of the Finger Lakes Trail is the Conservation Trail, which connects the Town of Ellicottville with Niagara Falls, New York.

Road Biking: Two major road biking routes traverse Cattaraugus County: the New York State Bicycle Tour and the Bike-centennial Route. The New York State Bike Tour travels through 60 miles of the county, entering in the east, along Route 446, and exiting to the west, along U.S. Route 62. The Bike-centennial Route is a national bike route. It runs from Iowa to Maine with over fifty-five miles through the county. It enters the County in the east, along County Route 46, and exits to the west, along U.S. Route 62.

Mountain Biking: Mountain biking is an increasingly popular recreational pursuit in Cattaraugus County. Significant trails systems are located in the Ellicottville/Holiday Valley area and within Allegany State Park. Holiday Valley and Allegany State Park regularly host Western New York Mountain Bike Association sanctioned races. Other popular trails are found in the McCarty Hill/Rock City State Forest, Golden Hill State Forest in the Town of Humphrey, and Nine Mile Creek State Forest, traversing the Towns of Humphrey and Allegany. Allegheny National Forest is also a popular mountain biking destination, with over 600 miles of trails open for mountain bike use.

Snowmobile Trails: As previously stated, Cattaraugus County is growing in popularity as a destination for snowmobiling. Allegany State Park currently offers ninety miles of marked and mapped snowmobile trails with direct access to Allegheny National Forest, where there is an additional three hundred miles of designated snowmobile trails. In other areas of the County, snowmobiling is permitted along town and County roads. There are several New York State designated snowmobile routes in western Cattaraugus County, although no designated connection to Allegany State Park has yet been developed.

While direct snowmobile trail connections exist between Allegany State Park and the National Forest, there is no reciprocal vehicle registration between the States at present, and snowmobile operators crossing the border must have valid registrations for each State. This issue is discussed in greater detail in **Section D, Part 2, h, ii, The Village of Limestone.**<sup>21</sup>

The ‘Hubs and Connections’ study indicates great potential for developing an extensive network of hiking trails and biking routes throughout the County. The proposed hiking trails discussed in the report would enhance the County’s hiking opportunities by establishing links between the numerous State Forests and Recreation Areas. A new hiking/biking/snowmobile trail, currently being considered, is the abandoned railroad right-of-way between the Village of Cattaraugus and the City of Salamanca. This potential four-season trail can also intersect with the Conservation Trail, which is the main trail leading to and from Allegany State Park and ultimately into Allegheny National Forest.

The report also states that expanding the number of bike routes throughout the county, may spur entrepreneurs to establish businesses along the routes, such as lodging accommodations and camping sites that will entice bicyclists to extend their stay in the County. In addition, the expanded biking network will allow for connections between popular tourist attractions like the many state forestlands and existing and interpretive centers. These connections can be marketed and trip brochures can be developed to assist the bicyclists. The County could also capitalize on the popularity of mountain biking by creating connections between existing trail systems, such as a link between the Ellicottville area and Allegany State Park. (See Map 6 – Trail Connections and Destinations)

# TRAILS & DESTINATIONS

MAP 6

## DESTINATIONS

- CULTURE & HISTORY
- NATURE / ENVIRONMENT
- RECREATION / ENTERTAINMENT
- CAMPGROUNDS
- SKI CENTER
- TOURIST ATTRACTIONS
- GOLF COURSES
- ECONOMIC DEVELOPMENT PROJECTS

## TRAILS

- MULTI-USE RECREATIONAL TRAIL - TO ALLEGANY ST. PARK TRAILS
- PARK SNOWMOBILE / HIKING TRAILS
- PARK HIKING / MTN. BIKING / CROSS-COUNTRY SKI TRAILS
- NYS SNOWMOBILE TRIALS CONSERVATION / FINGER LAKES TRAIL
- NYS / BIKECENTENNIAL TRAIL
- U.S. ROUTE 219 FREEWAY ALTERNATE
- PROPOSED INTERCHANGE
- SOUTHERN TIER EXPRESSWAY
- U.S. HIGHWAYS
- STATE HIGHWAYS



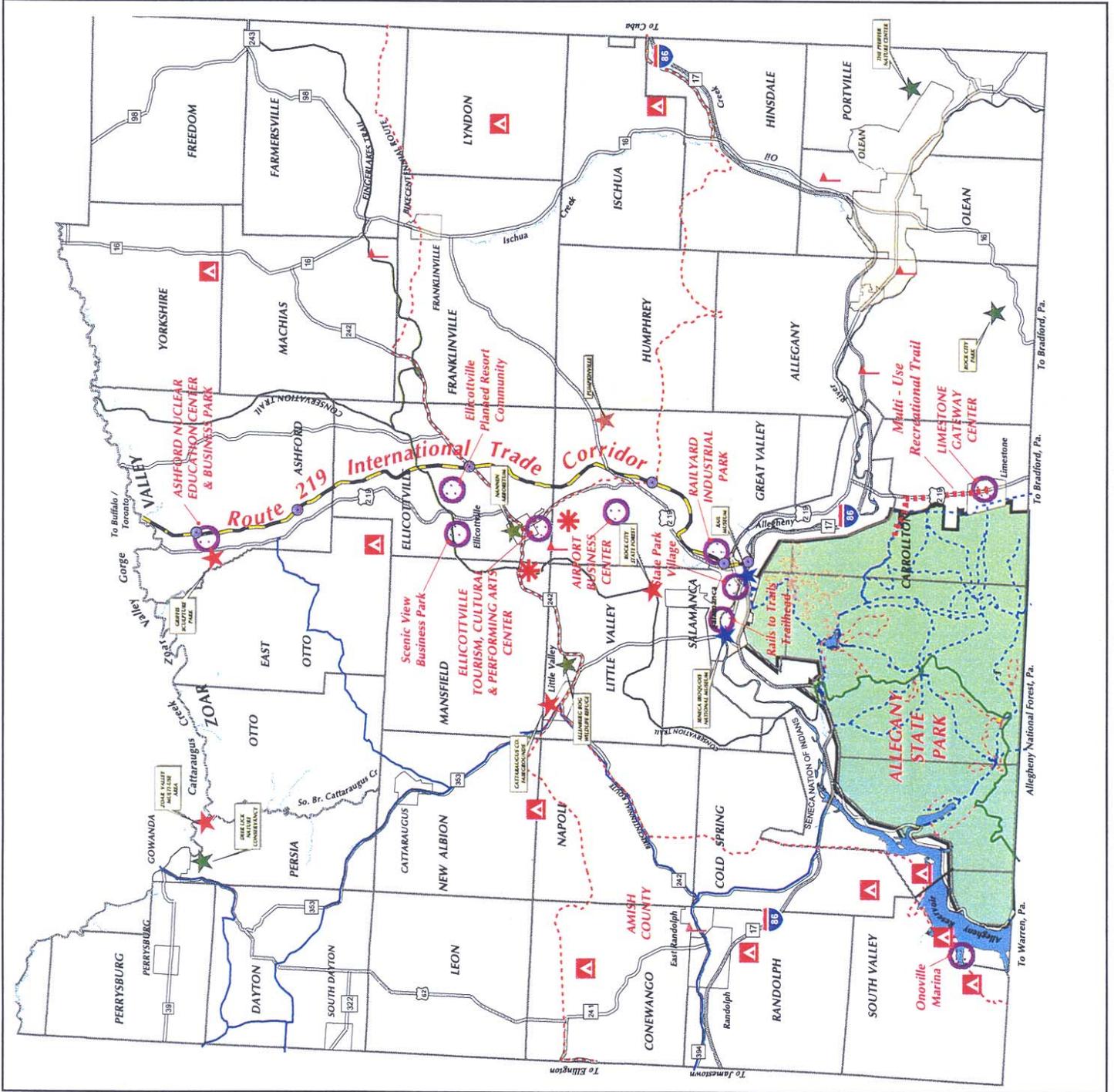
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LANDSCAPE ARCHITECTS, ARCHITECTS, ENGINEERS AND PLANNERS, P.C.  
SARATOGA SPRINGS, NEW YORK CITY AND BOSTON

## ALLEGANY STATE PARK PERIMETER STUDY

## CATTARAUGUS COUNTY



#### **d) Issues Affecting Allegany State Park's Economic Potential**

##### Changing Visitor Expectations:

Allegany State Park would benefit from a modification of its recreational programs and facilities in response to changing visitor expectations and the growing national interest in outdoor recreation. The Park recently developed six cottages with enhanced facilities and housekeeping service in response to a perceived demand among discriminating visitors who seek greater amenities in an outdoor recreation experience. As testament to the verity of the broadening of the market base, these cottages have proven exceedingly popular, typically being reserved almost one year in advance. It is anticipated that the draft Park Master Plan will address these opportunities.

##### Competition with Gateway Business:

Private vendors located within the Park provide the vast majority of daily use goods and services required by Park visitors. It is important to note that the Proposed Tourism Demonstration Projects are not designed to compete with existing interests within the Park. Their role would be complementary rather than competitive, with the aim of providing additional goods and services that are unavailable within the Park, and which target market niches in the Regional economy that are not served by existing interests within the Park. (See Chart 5, Recreational Market Segment Projects on page 76)

##### Distance to Gateway Communities:

The developed areas inside the Park are a 15-minute minimum drive from the nearest commercial services in Salamanca or Limestone. While the vendors in the Park provide basic services, it may be assumed that people will be willing to travel outside the Park for recreational facilities and social amenities. As stated above, the Demonstration Projects are not intended to compete with existing interests within the Park. Their role would be complementary to existing Park services rather than competitive with them.

##### Limited Visitor Resources:

In terms of socio-economic conditions, the majority of park visitors are low to moderate-income working class individuals or families. Park representatives state that current Park visitors appear satisfied with the diversity of recreational and entertainment facilities available within the Park. Given the Park's current niche role as a low-cost recreation destination, Park representatives believe that based on current park user profiles, higher-cost, out-of-Park recreational and entertainment services may not attract large

numbers of Park visitors. However, NYSOPRHP is currently evaluating opportunities to attract a more diverse user group.

Limited Shoreline Accessibility:

The shoreline of the 12,000-acre Allegheny Reservoir in New York State is almost exclusively within the Seneca Nation of Indians Allegany Reservation. Consequently, opportunities for recreation and tourism development are largely within the control of the Seneca Nation. The County-operated Onoville Marina is an important exception. Located to the west of Allegany State Park, this County-operated facility includes 394 dock slips for boats up to 40 feet in length, moorings, launch ramps, dockside electric hook-ups, pump-out facilities, fuel, and showers. Shore-side facilities include picnic areas and 77 public campsites. Canoe, pontoon and fishing boat rentals are available. Although the Marina draws over 60,000 visitors annually, its rural location limits the opportunities for retail and commercial support services.

Onoville Marina is one of only two marinas on Allegheny Reservoir, providing important access to its significant recreational resources. The second marina is 13 miles south of Onoville, near Warren, PA. Numerous campsites in the Allegheny National Forest are accessible only by boat, so Onoville Marina is also linked with recreational activities in Pennsylvania. In view of its excellent development potential, Onoville Marina has been selected as one of the Proposed Community Tourism Development Projects. This is discussed in greater detail in **Section D, 2, h, iii, Onoville Marina.**

Park/Community Planning Initiatives:

Allegheny State Park does not have the autonomy to participate in regional planning initiatives or implement expanded/enhanced facilities. All planning and facility improvement programs must be approved and funded by NYSOPRHP in Albany.

Improved Park Access via Upgrading of the Limestone Road:

The Village of Limestone has proposed the upgrading of a 5-mile portion of Limestone Run Road for four-season access into the Park. The Village asserts that this improvement would provide much needed access into the Park from the south, and afford Limestone important economic development opportunities as a Park Gateway Community. Allegheny State Park is currently considering this option as part of its forthcoming Master Plan, although they have expressed concerns about the growth of the Limestone area

as a snowmobile trailhead. The key issues under consideration are the need for a fifth public entrance to the Park, potential environmental impacts, construction and maintenance costs. NYSOPRHP is also considering the potential economic benefit to the Village of Limestone.

#### Snowmobile Access:

Snowmobile use within the Park is increasing. Current issues include conflicts between motorized use of the Park's trail system and the passive enjoyment of the natural environment by cross-country skiers and hunters, general safety levels, etc. Snowmobile enthusiasts represent a significant user group during the winter months. Unmet snowmobile needs include an expansion of the park trail system, connections to the regional trail network, restrooms, warming huts, food service, fuel, rentals, and registration reciprocity with Pennsylvania.

#### Allegheny National Forest/Recreation Area:

The Allegheny National Forest is a vast wilderness encompassing 512,000 acres immediately south of Cattaraugus County in Warren, McKean, Forest and Elk Counties, Pennsylvania. It is a heavily used outdoor recreational resource, with annual visitation estimated to be in excess of three million<sup>22</sup>. The National Forest is largely a primitive wilderness, comprised of mixed oak and hardwood forest, mountains, rolling hills, meadows, streams, ponds and lakes, with over 9,000 acres of land designated 'wilderness'. The Pennsylvania portion of the 24-mile long Allegheny (Kinzua) Reservoir is substantially contained within National Forest Lands. The Allegheny National Forest provides several hundred miles of hiking, biking, snowmobile and cross-country ski trails, as well as hundreds of miles of publicly accessible waterways. It also boasts numerous boat launches, fishing access points and boat access camping. The National Forest also contains eleven developed campgrounds operated by the U.S. Forest Service, and several private campgrounds. These campgrounds offer experiences ranging from family-oriented to primitive camping.

Although the National Forest permits the use of recreational sports vehicles on over 100 miles of dedicated trails, the use of such vehicles is not currently permitted within Allegany State Park. State Park representatives state that many State Park visitors camp in Allegany State Park, but cross into Pennsylvania to use ATVs. Although there are direct trail connections between Allegany State Park and the National Forest, there is no reciprocal vehicle registration between the States. Snowmobile operators crossing the border must have registrations valid in each State.

In addition to significant public recreational resources, a large selection of privately operated recreational facilities is located within the National Forest region. Resources cater to a wide range of socio-economic groups, and recreational pursuits. Accommodations include small hotels, bed and breakfasts, cabins, and hunting lodges ranging from wilderness rustic to well-appointed vacation resorts. Several private recreational outfitters offer one-day or multi-day outdoor recreational services. Neither the National Forest nor the State Park offers recreational guide services. Camp provision and outdoor supplies retailers are available throughout the National Forest region, particularly in the vicinity of the population centers of Bradford and Warren, PA.

It is evident that the National Forest provides a significant inventory of recreational resources and outdoor experiences immediately adjacent to Allegany State Park and Cattaraugus County. As such, it may be assumed that this vast, highly recognized, and well-publicized, recreational resource competes with Cattaraugus County as an outdoor recreation destination.

Rather than competing with the recreational resources of the Allegheny National Forest, Cattaraugus County's opportunity is to capture the economic development and tourism potential of the Gateway resources. Interstate 86 and Route 219 provide important access into the National Forest region from the north, east and West. The Village of Limestone is well located to serve not only as a gateway into New York from Pennsylvania, but also a gateway into the Allegheny National Forest from New York. Similarly, Onoville Marina serves as the primary marine gateway into the National Forest from New York State. Excluding lands of the Seneca Nation, no other opportunities for reservoir access exist.

#### **e) Tourism Development Opportunities**

As discussed in **Sections B, 3, Allegany State Park**, and **D, 2, c, Existing Regional Tourism Resources**, Cattaraugus County, Allegany State Park and Allegheny National Forest have a wide variety of existing tourism resources that address the needs of each tourism market sector. However, Allegany State Park typically attracts large numbers of middle-income visitors due to the abundance of low cost rest and relaxation, and outdoor recreation opportunities. Unfortunately, the State Park perimeter communities do not significantly benefit from such middle-income tourist activity. Although Ellicottville has successfully developed as an upscale outdoor recreation and entertainment destination, the economic

influence of the ski industry has not extended south into the Park perimeter areas to any meaningful degree.

In economic terms, the primary goal of the Allegany State Park Perimeter Zone is to complement existing tourism resources with a balanced mix of higher-end outdoor recreation, entertainment and sightseeing opportunities that capitalizes on the more lucrative segments of the market, the middle and upper income visitors from the region's urban centers. It must be noted, however, that all development must be 'green', in keeping with sustainable development ideals, and respectful of the natural environment as it is this very resource that attracts tourists into the region. It is also important that compromise and consensus be reached between the disparate Park users.

In order to deepen and broaden its existing tourist market, Cattaraugus County must perform two tasks. It must serve current Park users' needs and attract an increasingly diverse, higher end market of new users. In short, it must expand and diversify tourism opportunities to appeal to a wider range of income groups. In view of the research and analysis as previously discussed, particular emphasis should be placed on new hard adventure outdoor recreation resources to attract young, affluent adults, and supplement the existing inventory of soft adventure resources. In addition, the general quality level of existing recreational resources should be enhanced to appeal to higher income visitors.

#### Potential Enhancements of Day-Use Recreation:

##### Inside the Park

- Quality Developed Facilities and Amenities – The physical quality of park facilities may be enhanced to identify the Park as a quality recreational destination enjoyable for individuals and families of all income ranges.
- Modified Recreational Programs – Provide more diverse and contemporary facilities and services and programs in response to changing visitor expectations and the growing national interest in outdoor recreation.

##### Outside the Park

- Next Generation Entertainment Facilities - Amusement parks, virtual world activities (e.g., arcades, go-carts) and group/family participation activities (e.g., mini golf, paint ball) grouped in an organized entertainment district may appeal to a broad range of visitors.

- Museums and Cultural Interpretation Facilities - A concentration of cultural attractions offering diverse educational opportunities for families (e.g., such as a children’s museum or science center) may supplement existing cultural destinations in Salamanca.
- Scenic Railroad – Scenic railroads are becoming popular family tourist attractions combining sightseeing with cultural interpretation and entertainment.

Potential Enhancements for Family Vacations:

Inside the Park

- Quality Accommodations and Campground Facilities – The State Park has recently invested in higher quality housekeeping cottages to appeal to more discriminating visitors who seek greater amenities in an outdoor recreation experience. Similar improvements to common restroom/shower facilities and the surrounding campsite grounds may further identify Allegany State Park as a quality family vacation destination.

Outside the Park

- Comfort Accommodations – There is currently a limited inventory of family vacation oriented accommodations outside Allegany State Park. Upscale accommodations such as insulated cabins or cottages, hunting lodges, hotels, motels and bed and breakfasts could enhance and diversify a visitor’s experience and encourage both extended stays and return visits to the area. Such facilities might accommodate sightseers, rest and relaxation seekers, gamesmen, and snowmobilers.

Potential Enhancements of Nature Enjoyment:

- Preservation of the Resource - Retain what it is that brings people to the region in the first place (scenic, cultural, environmental resources) both within and beyond the Park boundary. The natural or recreational experience both within and outside of the Park often serves as the primary stimulus of the local or regional economy. Practice environmental stewardship.

Potential Enhancement of Contemporary Sports:

Inside the Park

- Expanded Rentals – Providing a full range of recreational equipment (e.g., mountain bikes, in-line skates) would diversify recreational experience within the Park and provide visitors an opportunity to participate in contemporary recreational pursuits.

- Sports Venues and Events – Allegany State Park has become a popular destination for mountain bike enthusiasts. The Park hosts Western New York Mountain Bike Association sanctioned races that typically draw large numbers of participants and spectators. Through trail maintenance and promotion, this level of use and activity could be expanded to include cross-country ski and triathlon events.
- Regional Trail Connections – Trail connections into Allegany State Park are currently limited to the Conservation Trail. Improved biking and hiking connections between the park and the perimeter communities would provide expanded outdoor recreational opportunities and better connect the park to surrounding economic centers.

#### Outside the Park

- Adventure Sports Venue – Contemporary recreational activities, such as in-line skating, mountain biking, bicycle moto-cross (BMX) and rock climbing are gaining in popularity. Public or private facilities providing an opportunity to participate in these activities would expand upon the recreational facilities found within the Park.

#### Potential Enhancement of Motorized Recreation:

##### Inside the Park

- Separation of Motorized and Non-Motorized Activities – Maintain an appropriate buffer between snowmobile trails and other recreation areas to avoid conflict between motorized used of the Park’s trail system and the passive enjoyment, including cross-country ski, snowshoeing, and hunting, of the natural environment.
- Expanded Services – Warming huts, restrooms and food services for snowmobilers would enhance the Park experience.
- Regional Trail Connections – The Conservation Trail is the only existing trail connecting Allegany State Park and the surrounding perimeter communities to the Cattaraugus County regional trail network. New connections would expand outdoor recreational opportunities and better connect the park to surrounding economic centers.

##### Outside the Park

- Trail Connections to Service Nodes –Trailheads and designated snowmobile trails adjacent to associated services, such as fuel, rentals, food service and lodging would enhance the recreational experience.

- Snowmobile Registration Reciprocity with Pennsylvania – Snowmobile registrations are not currently valid between states. Reciprocity would simplify regional travel and increase crossover traffic between the Allegheny National Forest and Cattaraugus County.
- Sports Recreation Vehicle Trails – Recreational sports vehicle use is increasing in popularity. Cattaraugus County can provide designated sports recreation vehicle routes in the County.
- Sno-Cross/Moto-Cross – Provision of a sno-cross / moto-cross venue.
- County Trail Maps – Provide a map identifying designated snowmobile routes, trailheads, services and attractions.

Each of the above Community Tourism Development Projects is discussed in greater detail in **Section D, Part 2, h, Gateway Communities: Proposed Tourism Demonstration Projects.**

Environmental Issues Relating to the Provision of Additional Campsites: According to the New York State Wetlands Inventory, there are no NYS DEC jurisdictional wetlands located in this area. The area may, however, contain US Army Corps of Engineers (ACOE) jurisdictional wetlands due to its location within the flood plain. Based on these factors, this site has limited potential for development other than a possible location for a day-use park.

Information on historically and archaeologically sensitive resources and endangered as well as threatened plant and animal species was unavailable to at the time of this report. Prior to any new land use or development, the New York State OPRHP and the New York State Department of Environmental Conservation should be contacted in an effort to preserve existing sensitive resources.

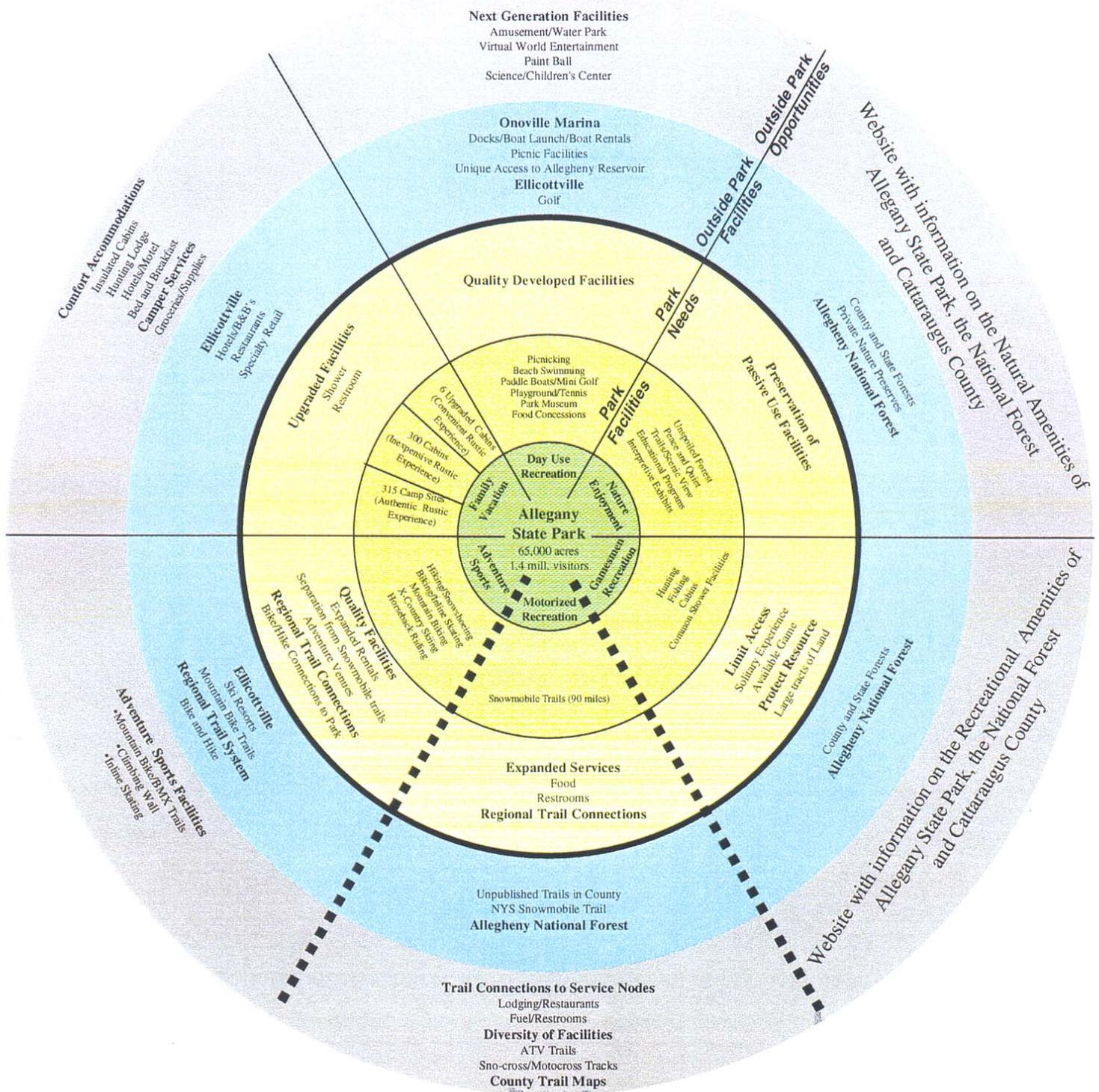
## **f) Commercial Opportunities**

As previously stated, the Park has a variety of users, often with conflicting agendas in terms of the optimum usage of Park resources. In tandem with these conflicting agendas, these disparate groups present a broad range of economic opportunities.

Chart 5, Recreational Market Segment Projects, graphically depicts this situation. It illustrates, by means of a wheel chart, the six main categories of Park usage: family vacations, day use recreation, nature

enjoyment and wildlife viewing, hunting and fishing, motorized recreation, and adventure sports. The participants in each of these activities call for services and facilities associated with their particular interest, and compromises are often difficult to reach. It should be noted that Park users generally share the desire to preserve and protect the natural Park environment. The Proposed Community Tourism Development Projects located at the Gateways have a strong role to play in the pursuit of consensus. These Development Projects would make it possible for services and facilities, which may be objectionable to other Park users, to be located in the Gateway Communities rather than within the Park. (See Chart 5 – Recreational Market Segment Projects)

Chart 5: Recreational Market Segment Projects



The economic opportunities presented by the disparate Park users include the provision of further accommodation facilities, retailing opportunities and entertainment facilities. They may be summarized as follows:

Additional Accommodation Options:

Hotel/Motel: The general area around the future interchange where the proposed Route 219 crosses the I-86 offers ideal locations for one or more motels of 100-150 rooms in size. Sites would serve traffic on both routes and could attract recreational and business travelers within a 10-20 mile radius, including the City of Salamanca and the Seneca Nation of Indians.

A Best Western hotel chain representative stated that there is no specific formula for the placement of a hotel. It is based on a number of factors, including the proximity of similar hotels, their rates of occupancy and room prices, the proximity of a highway, the presence of a tourist drawing downtown area and residential densities.

Lodge: A 50 to 100-room lodge on Red House Lake in Allegany State Park would serve a more upscale tourist market than the current supply of rustic cabins without indoor plumbing. The Lodge could be privately developed, and would be consistent with such facilities in National parks that are largely designated as primitive parks.

Camping Enhanced: Camping is one of the major components for recreational visitation in the area. It is a particularly important component of the pattern of use of Allegany State Park, accounting for one-third of overnight visitation. Camping areas in East Otto and Little Valley are also important in the pattern of visitation in the region. The concept encompasses the development of additional camping opportunities in the Park, as well as private campgrounds in the Route 219 Corridor.

Additional Retailing Options:

Centers for Antiques, Arts and Crafts: There is potential market support for additional retail development in antiques, arts and crafts. These are merchandise lines that appeal to tourists and highway travelers, and in which local retailers can compete effectively with large chain stores. These types of stores attract recreational travelers, and are compatible with the rural, village atmosphere that already exists in the

region. The County already boasts several large outlets, but additional sites may be found in Ellicottville, Olean, Salamanca and the Route 219/I-86 Intersection.

Factory Outlet: A factory retail outlet in the vicinity of the Route 219/I-86 intersection would provide an opportunity for companies to sell their own products directly to the public. An outlet center of this type should be located so that it does not compete with established retailers.

Local Retail Center, Route 219 at Ellicottville: The concept is the development of a line or cluster of stores, near one of the Route 219 interchanges in Ellicottville, although other locations along the corridor would also be possible. The type of retail development proposed would be specially designed to protect the ski-resort character. The parking would be located behind the buildings, using Randall Arendt's Rural by Design techniques.<sup>23</sup> The normal configuration would be in the form of a neighborhood center, with approximately 30,000-100,000 square feet of retailing set on 3-5 acres of land.

#### Additional Industrial Projects:

Industrial Incubator Facility: A flexible space industrial incubator of 20-25,000 square feet could provide low cost space to serve small local start-up companies and branch operations of non-local businesses. Such facilities normally are co-located in an existing industrial park or adjacent to an educational facility, such as a university, or a distribution center. Olean and Salamanca would be likely sites for such developments.

#### Additional Recreational/Tourism Projects:

Expanded Seneca Bingo Complex: The completion of the 219 Freeway Alternative will make the existing bingo facility in Salamanca accessible to a wider market. New Bingo facilities in other states are often combined with a hotel, camping area, retail centers or related entertainment. The Salamanca facility could be integrated with other attractions.

Indian Cultural Center: For some years, the Seneca Nation has considered the development of a major cultural center that could constitute an attraction for tourists as well as a center for the Seneca Nation itself. The Seneca Nation Museum that now exists in Salamanca is relatively small, but still represents a significant attraction. A new and expanded Cultural Center, with an expanded museum as well as other

types of attractions, could constitute a significant anchor for a larger development program in Salamanca, at the prerogative of the Seneca of Indians.

Casino: If New York State authorizes casino gambling (and Pennsylvania does not), there would be multiple opportunities for small casino/hotel combinations on major highways entering New York State.

Covered Ice Rink: A covered ice rink in the proximity of Ellicottville would increase the variety of winter/summer recreational facilities available for both local residents and tourists. The development of this facility could be staged, with an outdoor rink converted at a later date.

Recreational Rail Service: A private group has proposed a recreational rail service connecting the City of Buffalo, Kissing Bridge Ski Resort, Springville, Ellicottville, Salamanca, and terminating at the Kinzua Bridge State Park in Pennsylvania. The service would be designed to increase recreational travel in the Route 219/I-86 corridor.

### **g) Gateway Center for Industrial/Warehousing Development**

Great Valley Railyard Industrial Park (Cattaraugus County Crossroads (Rtes 219/I-86)):

This Demonstration Project has been proposed as a magnet for industrial development within the Perimeter Zone. The Project would be ideally located to act as the base for all industrial development in the vicinity of the Gateway Communities, thus effectively separating industrial and tourism development in order to preserve the scenic amenity of the area.

As stated in **Section 1, Part d**, the intersection of two regionally important transportation corridors, Route 219 and the Southern Tier Expressway (I-86) will open southern Cattaraugus County to regional traffic. Major potential has been recognized for industrial, inter-modal and distribution industries using interstate truck, rail, and/or air services, at this location. This creates an opportunity for office, light manufacturing, warehousing and inter-modal distribution uses that capitalize on the interstate crossroads location. The associated increase in the volume of transient travelers will create a market for highway based commercial services such as hotel/motel accommodations, restaurants, and niche retailing. The location

of the proposed business center in relation to the intersection of Route 219 and Route I-86 will be a critical factor in the success of the project.

The interchange would create a highly desirable development site, opening up two development locations, one of which, Railyard Industrial Park, would be oriented toward light industrial and distribution uses, the other, the Western Door Commerce Center, would focus on mixed-use development with highway-related commercial projects as the anchor. At the request of the Seneca Nation, the Western Door Commerce Center proposal is not developed in this study. It may be developed in the future at the prerogative of the Seneca Nation.

The Railyard Industrial Park will be developed on the site of a former rail yard. The site enjoys excellent highway access and existing rail service. Located in the Town of Great Valley, it is adjacent to the City of Salamanca and the Seneca Nation's Allegany Reservation. The City of Salamanca has excess sewer, water and municipal electric capacity, and may be engaged in a development partnership with both the County and the Town. In addition, Salamanca maintains a small industrial park on Morningside Avenue that may be incorporated into this development. The proximity of the proposed site to the Seneca Nation provides an opportunity for Seneca investment in a business development of regional importance.

This project has two components, the Highway Commercial Component and the Business Center Component, requiring a total of approximately 170 to 260 acres between them. The Railyard Industrial Park will require 62,000 sf of office space, 240,000 sf of warehouse and distribution space, 120,000 sf of assembly and light manufacturing space and 100,000 sf devoted to an Inter-modal terminal. Both of these developments will be spread over three phases, so this land requirement will be gradual.

Ultimately, this Business Center has the potential to become the primary business and industrial center of the Southern Tier West region, and should be marketed as a project of statewide importance. While the immediate geographic market for this project includes Cattaraugus County, Western New York, and northwestern Pennsylvania, the various transportation connections offer an excellent opportunity to attract businesses requiring regional warehousing operations serving the Northeast and Midwest.

The Railyard Industrial Park's role as an inter-modal terminal expands the implications and influence of the proposed project, offering potential for the development of a large industrial site for users requiring

integrated rail and truck service, and significant real estate opportunities in typical commercial components, including restaurants, retail and hotel/motel development. These components would serve a market including the travelers on both roads.

As previously stated, the most important strategic challenge facing Cattaraugus County is the creation of stable and relatively high paying employment. The development of the Railyard Industrial Park represents an unparalleled opportunity for the private sector to create a modern business center with structures that take advantage of the intersection of the two major roads, and provide jobs for County residents. This opportunity encompasses a spectrum of commercial uses that complement each other and create a major point of development in the County. The project would also serve to focus commercial development by concentrating opportunities in and around the intersection.

In summary, the project could potentially serve the following objectives:

- Expansion of the economic base.
- Leveraging infrastructure investments.
- Focus on incremental benefits at corridor locations where development activities tend to cluster.
- Avoidance of redundant public investments.

The key advantages of the proposed development include its strategic location, its proximity to the Seneca Nation, the ready availability of dedicated natural gas resources to support industrial development, and the potential use of municipal services (sewer, water, electric) from the City of Salamanca. Since the Route 219/I-86 interchange is on the property of the Seneca Nation, the Nation should be part of a comprehensive planning process for the adjacent land. It will be important to develop a comprehensive plan that considers complementary relationships, preserves compatibility, keeps infrastructure costs as low as possible and reduces environmental impacts. Warehousing and industrial development is proposed for construction at the first interchange north of the Route 219/I-86 interchange. The first phase of the project would necessitate a defined entry, visible from the interchange, with good signage and aesthetic appeal. The nature and location of the first project on each proposed development site should be determined in a manner that creates an identity, since the initial project typically becomes the marketing hook for future components.

The approximate construction cost for site improvements necessary to accommodate the Railyard Industrial Park are estimated at approximately:

- Public Investment (Roads and infrastructure) \$1,750,000\*
- Private investment (commercial/industrial buildings and site development) \$51,301,000\*

\*These estimates are provided for budgetary purposes only, and exclude land acquisition costs.

Over its three phases, it is estimated that the project may result in the creation of between 2,200 and 2,600 new jobs in the project area, including approximately 1,900 jobs in warehousing, manufacturing and related activities, and another 500 jobs related to the accommodations, restaurants and retail components of the project. The project may be able to take advantage of excess infrastructure available from Salamanca; cost of extending lines from the City are likely to be expensive, but this cost would be far less than the creation of new infrastructure capacity.

As previously mentioned, the site proposed for development served as a railyard for many years and has environmental contamination characteristics of that use. Since the Freeway Alternative for an Upgraded Route 219 will traverse a portion of the former railyard, NYSDOT retained Ecology and Environment (E&E) to undertake site screening and assessment to identify specific problems. E&Es site assessment effort took place in late 1996 or early 1997. The results of the E&E assessment are outlined in the draft environmental impact statement, and in a more detailed manner in the hazardous waste appendix to the Environmental Impact Statement.

In response to this assessment, NYSDOT notified the New York State Department of Environmental Conservation (NYSDEC) of problems in need of remediation on the CSX parcels. NYSDEC has been working with CSX to develop the required remediation but this remains unfinished at this point in time. The primary focus of the assessment was on a fuel spill in the center of the property that has now affected the ground water. DEC and CSX are negotiating a testing program to identify the exact extent of the problem. Subsequent to that, a remediation program will need to be developed.

The Site Assembly includes the following CSX Parcels:

Tax Map Number 73.004-1-13.1 in the Town of Great Valley (Salamanca Schools)

**ALLEGANY STATE PARK PERIMETER STUDY  
TASK 2 – ECONOMIC AND MARKET ANALYSIS**

■

58.43 Acres – Vacant, Commercial (330) assessed at \$2,950

Owner: B&O Railroad Company

Tax Map Number 73.004-1-13.2 in the Town of Great Valley (Salamanca Schools)

39.40 Acres – Rural Vacant (320) assessed at \$2,000

Owner: Mount Clare Properties

Tax Map Number 73.004-1-13.3, Town of Great Valley (Salamanca Schools)

25.40 Acres – Ceiling Railroad (842) assessed at \$37,088

Owner: Buffalo & Pittsburgh Railroad

Tax Map Number 73.004-1-13.1/1 Town of Great Valley (Salamanca Schools)

.01 Acre – Phone Facility (831) on CSX right-of-way, assessed at \$36,044

Owner: MCI telecommunications

The Southern Tier West Planning and Development Board proposes to form a not-for-profit development corporation to acquire the site and undertake development activity. Their ultimate objective in this undertaking is to provide development sites for companies that have outgrown the Southern Tier West incubator building on Route 219, just north of the Railyard site. The Development Corporation will be the focus for site assembly, environmental remediation negotiations, retaining consulting engineers to undertake preliminary engineering and design, and assembling the required public-private financing package. The Corporation will be assisted by the Cattaraugus County Department of Economic Development, Planning and Tourism, and the County of Cattaraugus Industrial Development Agency.<sup>24</sup> (See Map 7, Railyard Industrial Park)

# RAILYARD

# INDUSTRIAL PARK

MAP 7

-  Building Development Areas
-  Railway Park Property Boundaries
-  Railroad Tracks
-  Steep Slopes (>16% Slopes)
-  100 - Year Flood Zone (Federal Emergency Management Agency Q3 Flood data, 1998)
-  Wetlands (NYS Wetland Inventory, 1990)
-  Parcel Boundary (Cattaraugus County Real Property Tax, 2000)

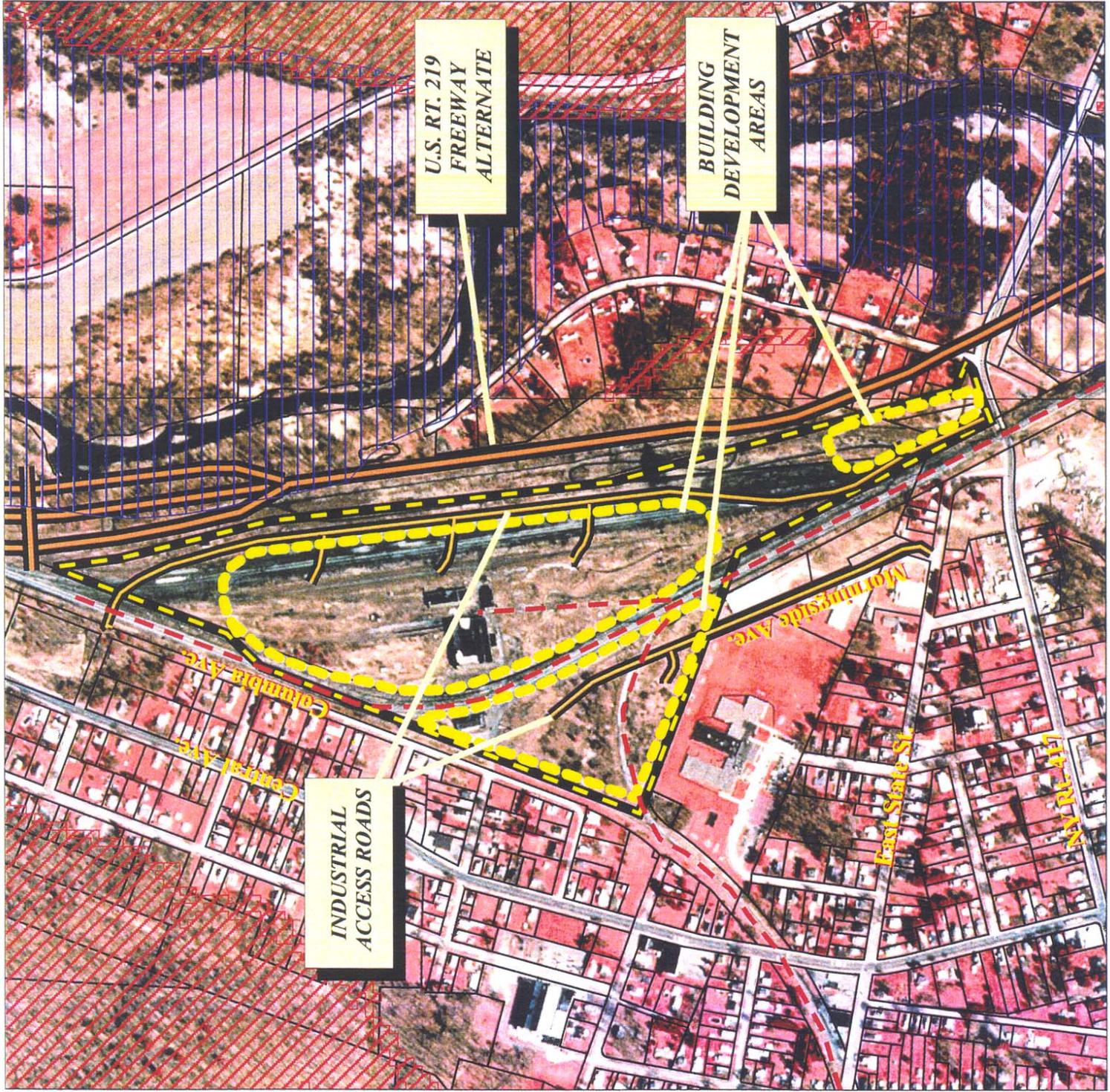


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## **h) Gateway Communities: Proposed Tourism Demonstration Projects**

The previous section outlined various opportunities for tourism development that exist in Cattaraugus County, and specifically within the Perimeter Zone. From this broad outline, TSA has developed a detailed analysis of four Proposed Community Tourism Development Projects, two of which are located in the City of Salamanca, one in the Village of Limestone, and one at Onoville Marina.

Salamanca, Limestone and Onoville Marina were selected as the three Gateways of the Perimeter Zone, and the sites of the Proposed Community Tourism Development Projects. These sites were chosen primarily due to their strategically important locations at or near Park entrance points, and to their extremely under-utilized, but enormous potential for successful tourism-oriented development.

As previously stated, the Gateway Communities share a number of features – a close proximity to the Park, a beautiful natural environment, and an attractive rural atmosphere. Each represents a strategically located, if under-developed, resource, and each has the potential to develop into a prosperous, tourism-oriented center. Within the broader theme of the Perimeter Zone, the Gateway Communities each have a unique character. Salamanca is heavily influenced by the proximity of the Seneca Nation and the cultural diversity that this imbues. This diversity is a strong theme, which should ideally be woven into the City's image, with additions to the existing Native American street art and further cultural amenities. Limestone is historically a lumber and tanning town, with a strong rural atmosphere. Onoville Marina is an aqua-centric resort, located in a magnificent natural setting. Both Limestone and Salamanca enjoy excellent infrastructural amenities, including street lighting, roads, water supply and sewage facilities, which could easily withstand the increased demands associated with urban development.

The Gateway Communities are clustered in valley areas close to the Allegheny River and, as such, each is influenced by the River's floodplain. This environmental impact on proposed development options is discussed in greater detail under each Proposed Community Tourism Development Project respectively.

In addition to its aesthetic and cultural value, the Park has an immense impact on the economy of the County, representing the largest recreational tourist destination in the region – attracting in excess of 1.8 million visitors in 2000<sup>25</sup>. The Park is 65,000 acres in area, the majority of which is primitive woodland.

It is the largest in the New York State Park system and the third largest state park in the country. Most of the Park's visitors travel from western New York and Pennsylvania, with a minority from such places as Ohio and southern Ontario.

The tourism-oriented nature of the Proposed Projects reflects the findings of numerous studies, including the 'Hubs and Connections' study conducted by the Department of Urban and Regional Planning at the State University at Buffalo, the 'Outdoor Recreation in America' study, and NYS Department of Transportation projections for traffic and employment in the event of the Route 219 Freeway Alternative coming to fruition, all point to tourism as a major employment source for Cattaraugus County.<sup>26</sup>

The Proposed Community Tourism Development Projects will now be discussed individually, with a section on the environmental issues relating to each of the proposed developments respectively.

i) The City of Salamanca

Salamanca is located in the Allegheny Foothills, in an east-west valley centered on the Allegheny River – both of these topographical features influence the location of development within the City. The valley is bounded to the north and south by steep, densely forested slopes. The Allegheny River presents a dichotomy for the City – it creates a central spine, which acts as a natural focus for urban development, spectacular scenery and wildlife habitat close to the City limits, but it also generates a flood plain and associated wetlands, restricting development.

Salamanca is extremely unusual, in that it lies entirely within the Allegheny Reservation of the Seneca Nation of Indians. That is a very strong and marketable community theme upon which Salamanca must capitalize if it is to optimize its development potential. Salamanca boasts two museums. The Seneca-Iroquois National Museum in Salamanca houses Native American artifacts and provides interpretation of pre-historic and contemporary life of the Seneca and Iroquois. The museum shop is a major outlet for locally produced articles made by Iroquois people. Another Seneca Nation enterprise is the highly successful Seneca Bingo. The Allegheny Reservation offers a unique opportunity for visitors to learn about Native American culture. The Salamanca Rail Museum includes a fully restored passenger depot, originally constructed in 1912 by the Buffalo, Rochester, and Pittsburgh Railway. The museum displays artifacts and historic photographs. Video presentations depict an era when rail was the primary means of transportation. While the city is fortunate in that it has retained a historic Main Street, and West

Salamanca is becoming a downtown ‘destination’, its development could benefit from advanced design concepts and review. It remains largely an untapped resource in terms of tourism related development.

If Salamanca is to succeed as a tourism-oriented center, it must provide additional tourist services, such as restaurants, accommodation, retail services, entertainment and an increased number and quality of visitor services to draw tourists into the City. To this end, a comprehensive development proposal has been devised.

The eastern section of Salamanca is proposed for development as a State Park Village, containing such tourism-oriented amenities as a tourist information center, guest accommodation, restaurants, family entertainment facilities and an interpretive center, the State Park Village will go beyond the services of the NYSDOT welcome center at Allegany, scheduled for construction in 2002. Two sites have been identified as the potential location for the proposed State Park Village – the abandoned Hospital lot west of Parkway Drive, and a series of vacant and residential lots, south of East Race Street. These sites are in the immediate vicinity of Interstate 86, Exit 21, and are easily accessible from Allegany State Park by Parkway Drive. Both are served by City water and sewage services, and have relatively few development constraints.

(See Map 8 – City of Salamanca State Park Village)

# City of Salamanca

## State Park Village

MAP 8

-  Salamanca State Park Village
-  Multi-Use Recreational Trail
-  Steep Slopes (>16% Slopes)
-  100 - Year Flood Zone (Federal Emergency Management Agency Q3 Flood data, 1998)
-  Wetlands (NYS Wetland Inventory, 1990)
-  Parcel Boundary (Cattaraugus County Real Property Tax, 2000)



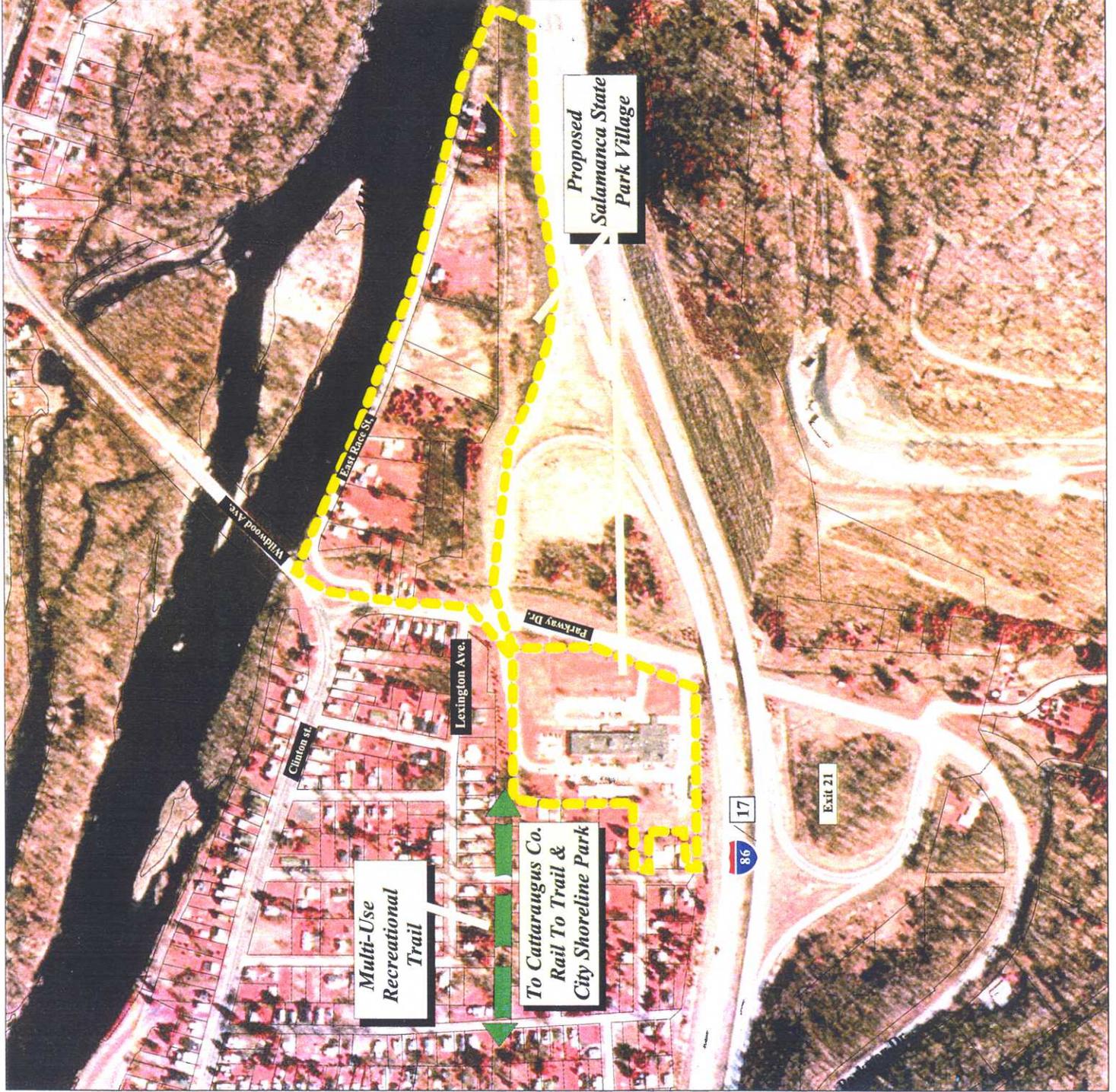
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It is proposed that as a complementary development to the proposed State Park Village, the west end of the City be enhanced and developed. This development could be conducted along existing lines, with an expansion of the existing Seneca bingo, the provision of an amusement arcade, and additional adult recreation facilities, such as a movie theater, restaurants, and a casino.

The focus of this complementary development would differ in character from that of the east section, in that it would offer more adult-oriented activities and amenities. In addition, Salamanca may capitalize upon the fuel needs of snowmobilers with its unique ability to sell tax-free gasoline at a convenient location.

Salamanca is the ideal location for the snowmobile trailhead, connecting as it does to a large-scale regional network of trails. The importance of this role as the nexus of the County's trail system was also emphasized by the 'Hubs and Connections' study. The bridge that traverses the Allegheny River is due for renovation by the Department of Transportation. It is proposed that the new bridge be equipped with a separate, purpose-designed lane specifically for the use of snowmobilers. This lane would be of great assistance in terms of avoiding potentially troublesome lane sharing and also retaining and cementing Salamanca's position as trailhead. (See Map 9 – City of Salamanca Shoreline Park and Recreational Sports Vehicle Trail)

# City of Salamanca

## SHORELINE PARK & MULTI-USE RECREATIONAL TRAIL

MAP 9

-  Proposed Project Boundaries
-  Multi - Use Recreational Trail
-  Steep Slopes (>16% Slopes)
-  100 - Year Flood Zone (Federal Emergency Management Agency Q3 Flood data, 1998)
-  Wetlands (NYS Wetland Inventory, 1990)
-  Parcel Boundary (Cattaraugus County Real Property Tax, 2000)



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Environmental Issues Relating to the Proposed State Park Village:

The majority of the properties along East Race Street consist of Unadilla Silt Loam, which is well drained and gently sloping. The area along the shore of the Allegheny River is within the 100-year flood zone and contains slopes in excess of 16% between East Race Street and the river. These slopes primarily constitute the shoreline of the River and will not necessarily preclude boat access if proposed.

The western portion of the East Race Street site contains an intermittent or permanent stream with the 100-year flood zone on both sides. According to the 1940 soil survey, the southern part of the site contains soils in the Tyler Silt Loam series, which exhibit poor drainage capabilities. However, it is likely that this area was substantially disturbed during the construction of Interstate 86, resulting in a different composition of soils.

According to the New York State Wetlands Inventory Maps, there are no NYSDEC regulated wetlands in this area. There may, however, be some federally regulated wetlands along the shoreline of the river that may present some access constraints. Additional investigation of the shoreline will be required, and a Jurisdictional Determination from the US Army Corps of Engineers should be secured.

It is recommended that the abandoned hospital, which has asbestos problems, should be demolished. The site does not contain any wetlands, or slopes in excess of 16% nor is it within the 100-year flood plain.

Information on endangered or threatened species of plants and animals was not available to be incorporated into this report. The NYS DEC should be contacted and Natural Heritage information secured prior to any new land use or development in the above described areas. The Seneca Nation of Indians Cultural Resources Inventory conducted in 1993 identified five archaeological sites within the City of Salamanca. The specific location of these sites is only available by contacting NYSOPRHP or by reviewing the Seneca Report, which requires authorization from the Nation.

ii) The Village of Limestone

The second Tourism Demonstration Project is located in the Village of Limestone. Limestone is located fifteen miles from Salamanca and Olean, five miles north of Bradford PA and 60 miles south of Buffalo. The Village is primarily residential, with a scattering of businesses. The 2000 Census recorded the population of Limestone at 411, a decline of approximately 10% from the 1990 rate of 460. Limestone is an enduring community, which has weathered the storms of the decline of the lumber and tanning industries, the recession of the late 1970s and 1980s, rural depopulation, and the loss of much of its youth labor force to larger urban centers. The Village has excellent infrastructural amenities. In 1997, the water system was completely upgraded with the replacement of all main lines and fire hydrants. The reservoir was replaced with a 256,000-gallon tank<sup>27</sup>, operated by a tele-metering system that automatically activates the pumps when the reservoir reaches a preset level. The population in the western section of the Village use septic tanks for their sewage requirements. Limestone has good quality roads and sidewalks. Although the housing stock is somewhat poor, with 30% mobile homes, the Village is keen to improve that situation and recognizes that if outside interests are to be encouraged into the area, then provision of appropriate housing stock must be a priority. To this end, a policy has been introduced whereby existing mobile homes may remain in their present location, but may not be replaced by new structures. By this means, Limestone intends to gradually phase out mobile home development within the community.

Approximately 15% of Limestone's buildings are vacant, representing both a constraint, in that such sites are currently unattractive and take from the general aesthetic, and an opportunity, in that they are immediately available for redevelopment. The availability of vacant sites for infill development affords Limestone the ability to develop the site according to the preferred Design Standards and in keeping with the image that the Village wishes to project.

The Village retains a strong will to revitalize and elevate its status, and is pro-active in its pursuit of viable enterprises which would lead to economic revival. In this spirit, Limestone adopted a Comprehensive Plan in 1995. The plan was based on the stated need for a vision for the future, one that would balance Limestone's scenic location, natural beauty and rural atmosphere, with the need for improved municipal services, economic development and improvements in the housing stock. Politically, Limestone is keen to cooperate with surrounding jurisdictions.

The development concepts, goals and policies as outlined in Limestone's Comprehensive Plan reflect many of TSA's objectives for the Village. While unchecked and unguided development would be potentially catastrophic for the character of the Village, correctly guided and appropriately scaled development would be of great benefit, building on the Village's urban fabric, developing its character and establishing it as a popular destination with interesting activities and amenities to offer the visitor. Stated policies for Limestone include:

- The enhancement of Limestone's image
- Establishment of economic development to expand the tax base and create jobs
- Improvement in the housing stock
- Development of a site plan and landscaping requirements
- Encouragement of the creation of a Central Business District (CBD).<sup>28</sup>

Community participation represents an integral part of the Perimeter Study as a whole, and thus far has played a particularly active role in Limestone. The Village exhibits a strong spirit of volunteerism, involving the grass roots contribution of all community members. This is extremely important and should be encouraged and harnessed via the organization of a Stakeholder Committee. The role of the Stakeholder Committee is discussed in greater detail in **Section E, Orienting Major Stakeholders in Perimeter Zones**.

Entrepreneurial spirit also has an important role to play in the development of Limestone. Mr. Rick Pecora, Mr. Bill Rounsville, and Mr. Charlie Krepp, are key players in this regard. Mr. Rounsville is the proprietor of the Village Mystic Water Resort, a year-round, multi-purpose resort. Based on the success of the business thus far, Mr. Rounsville has plans for expansion, including the provision of further guest accommodation. In addition to this facility, it is proposed that a 60-80 room hotel be constructed, ideally in accordance with stated Design Standards, for the accommodation needs of those individuals attracted by the Recreational Sports Vehicle Center.

Mr. Pecora is the proprietor of 'Rock'n'Rick's', a successful club and restaurant in the heart of Limestone, a limousine service adjacent to that premises, and an attendant-operated fuel pump. The need for further fuel servicing is a pertinent issue to be addressed, in answer to which Mr. Pecora intends to install a self-service 24-hour gas pump. 'Rock'n'Rick's' caters to both over and under-21s. The latter

must remain within a designated area of the club, and are served soft beverages only. He is also the owner of a large tract of land that he is keen to develop to the greatest possible economic and environmental advantage. He intends that one section of this land be given over for public use as a small, landscaped park. Another section will be devoted to long-term snowmobile storage. Mr. Krepp is the proprietor of Charlie's Cycle Center, a prosperous motorcycle and recreational sports vehicle sales and service center.

The Cycle Center has already laid the groundwork for the establishment of Limestone as a general service center for snowmobilers along Route 219. TSA proposes that Limestone build on this foundation to develop a Recreational Sports Vehicle Center, acting not only as a recreational resource, but as a service center along the Route 219 corridor, catering to the overall needs of recreational sports vehicle enthusiasts. The strong link that already exists via such Charlie's Cycle Center may be harnessed and bolstered by the accommodation, entertainment and dining facilities provided by the Mystic Resort and 'Rock'n'Rick's'. Both of the latter establishments are keen to expand their services to meet anticipated demand. Mr. Pecora is also proposing the development of long-term storage facilities for up to thirty snowmobiles. Another Village resident has committed to establishing a convenience store with an automatic teller machine if the proposed welcome and visitor center is developed.

Limestone is the ideal location for such a center due to its existing links to snowmobile trails throughout the Park. As part of the proposal package, it is recommended that these trails be reorganized and extended both within the Park and beyond. The aim of the development would be to establish Limestone's Recreational Sports Vehicle Center as a magnet for snowmobilers, with the Village providing necessary support mechanisms in terms of food, accommodation, and entertainment. (See Map 10, Village of Limestone Recreational Sports Vehicle Center)

**VILLAGE OF LIMESTONE  
RECREATIONAL SPORTS  
VEHICLE CENTER**

MAP 10

-  Proposed Project Boundaries
-  Village Boundary
-  Proposed Rt. 219 Ramps / Access
-  Proposed Pedestrian Bridge
-  Park Access Routes
-  Steep Slopes (>16% Slopes)
-  100 - Year Flood Zone (Federal Emergency Management Agency Q3 Flood data, 1998)
-  Wetlands (NYS Wetland Inventory, 1990)
-  Wetlands National Wetlands Inventory (Field Verification Necessary)
-  Parcel Boundary (Cattaraugus County Real Property Tax, 2000)



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Cattaraugus County



Proposed Multi - Use  
Recreational Trail  
To Allegany St. Park

Economic Development  
Infill Sector

North Rd.

Church St.

Main St.

Parkside Dr.

Spiller Dr.

Bailey Ave.

Rt. 219  
Main Highway

219

Cabains &  
Camping /  
Recreation Field

Mystic Water  
Park

Mini Golf /  
Water Slides

Performing Arts  
Center

Limestone Park Entrance &  
Access Road to  
Allegany State Park &  
Allegheyy National Forest

Allegany State Park

The site proposed for the Recreational Sports Vehicle Center is a vacant parcel of land, over 55 acres in area, located west of NYS Route 219. This site is currently owned by Rick Pecora, who is in favor of the project. The entire lot is classified as Commercial Use, and is bordered by the Tunungwant Creek to the west, by River Street to the North, by another vacant parcel to the south, and by a narrow strip of land parallel to Route 219 to the east. This site is served by Village water and sewage services, and is the most logical area for the proposed Recreational Sports Vehicle Center. There are however, some development constraints, which are discussed under Environmental Issues Relating to the Proposed Recreational Sports Vehicle Center, below.

A number of elements are involved in the planned development as outlined above, and the development of the Recreational Sports Vehicle Center would require the establishment of associated support businesses. Visitors will need restrooms, warming huts, food, fuel, equipment rentals, and the provision of improved trail connections. In order to attract visitors in the first place, an information and welcoming point is also necessary. To this end, the community has proposed the development of supportive elements including a State Welcome and Tourism Information Center, and a motel-restaurant complex. It is proposed that the Welcome Center be established at the southeast corner of the intersection of Main Street with Route 219, a site classified as 'Commercial Use'. This site is occupied by a convenience store, which is currently closed for business. As previously stated, a Village resident has committed to establishing a convenience store with an automatic teller machine if the proposed welcome and visitor center is developed.

An important issue, which has yet to be resolved, is registration reciprocity. Although there are direct trail connections between Allegany State Park and the National Forest, there is no reciprocal vehicle registration between the States. Snowmobile operators crossing the border must have registrations valid in each State. This lack of reciprocity and the additional registration expenditures it implies may discourage passage of snowmobiles across state lines from the National Forest into Allegany State Park, and thus to Limestone.

Additional sites identified for potential infill development include several parcels of land located to the east of Route 219. These land parcels are classified as 'Vacant' and 'Residential', according to the

Cattaraugus County Real Property Tax Services Agency. Some of those classified ‘Residential’ are occupied, and some are not.

It is anticipated that spin-off development will be generated by the successful completion of the Proposed Community Tourism Development Project at Limestone. This development would ideally be located both within the Village of Limestone and in the Town of Carrollton, which has land available for development on its northern side.

The planned developments in Limestone will require approximately 60 to 80 acres in total. This includes two phases of development and may be broken down as follows: 20,000 sf of welcome center space, a 40 to 60 room motel, 5,000 sf of restaurant space, 5,000 sf of gas and auto service space, 4,000 sf of convenience store space, 20,000 sf of specialty retail center space to be developed in Phase I, and 3,000 sf of fast food space to be developed in Phase II.

Environmental Issues Relating to the Proposed Welcome Center and Infill Development:

According to the U.S. Agricultural Department’s 1940 Soil Survey, the areas identified consist of Atkins Silt Loam soils exhibiting poor drainage capabilities and a shallow depth to the seasonal high groundwater table. However, these sites are currently serviced, or have the potential to be serviced, by the Village water and sewer systems. The vacant parcel located north of Plant Street falls within the 100-year flood zone, according to the 1998 Federal Emergency Management Agency Q3 Flood Data. None of the sites contain State or Federally regulated wetlands, and all have slopes of less than 16 percent.

Environmental Issues Relating to the Proposed Recreational Sports Vehicle Center:

The proposed site of the Recreational Sports Vehicle Center lies within the 100-year flood zone. According to the National Wetlands Inventory maps, scrub-shrub, and forested and emergent wetlands are scattered throughout the parcel. These wetlands, if not greater than or equal to 12.5 acres, are not subject to the jurisdiction of the NYS Department of Environmental Conservation (NYSDEC). However, they may be subject to the jurisdiction of the U.S. Army Corps of Engineers (ACOE). Further analysis of this site is necessary and a Wetlands Jurisdictional Determination from the Army Corps of Engineers should be secured.

According to the Village of Limestone Comprehensive Plan, adopted in 1995, the Village lies within a recognized archeologically sensitive area. There are several areas that have been identified as sensitive sites by the NYS Museum Archeological Site File, and the NYS Historical Preservation Office Archeological Site File. This information is available by contacting the New York State Office of Parks, Recreation and Historic Preservation (OPRHP).

No endangered or threatened plant or animal species are known to occur in these areas, according to the 1995 Village of Limestone Comprehensive Plan.

iii) Onoville Marina

Onoville Marina is the third Proposed Community Tourism Development Project. It is located on the west bank of the Allegheny Reservoir, south of the I-86 interchange. It is accessible from the north and south via Route 280 (West Perimeter Road), and via Sawmill Run road to the west. The site, which is owned by the US ACOE and leased to the County, is divided into three main areas: the Bay Sector, the Sawmill Run Sector and the Brown's Run Sector. The Bay Sector is bordered to the north and west by West Perimeter Road, by Onoville Bay to the south, and by the Seneca Nation of Indians Reservation to the east. The Seneca Nation owns the Highbanks Campground, which is in close proximity to the Marina.

This site was originally chosen as the optimum location for the marina due to its scenic value, and its development potential as a water-based facility. It has been selected for further development at this point due to its strategic location close to the perimeter of the Park, and because it is a County-operated site, avoiding competing and contradictory interests in terms of development.

To accommodate the facility throughout the boating season, a channel was dredged at the time of construction, ensuring a pool elevation of almost 1,300 feet. The Marina is generally fully operational between the months of April and November, based on fluctuating weather conditions. Only in times of drought, such as the summer of 1999, do water levels fall below navigable levels prior to the end of the summer season. Throughout the summer months, the Marina operates at full capacity, with all docks occupied.

The Marina has 394 dock spaces, varying in size from 20-foot slips to 40-foot slips. The rental rates for these spaces varies according to size, with prices ranging from \$430 per annum for a 20 foot slip, to \$1,300 per annum for a 40 foot slip with shore power. The site as a whole contains 77 public campsites, picnic shelters, a fuel dock, pontoon boats, fishing boats and canoe rentals, showers, laundry facilities, and a generous open area for recreation.

The catchment area for the Marina runs from Buffalo to Salamanca, along the Route 219 corridor. It is estimated that approximately one-third of its patrons are from Erie County, close to Buffalo, one-third are

from Cattaraugus County, and one-third are from Pennsylvania. In socio-economic terms, these individuals tend to be middle class, with white-collar occupations.

The Marina is the economic focal point of the area, surrounded by a sparsely developed hinterland. This hinterland is owned by the US Army Corps of Engineers and leased to Cattaraugus County. While development of this land would require Corps approval, it is probable that this approval will be granted, contingent upon the development plans being consistent with the Marina Area Master Plan.

The businesses that have developed in association with the Marina have generally followed its seasonal pattern of operation. In the immediate vicinity of the Marina there is a general store, a five-room lodge, an ice-cream stand, camping and picnic facilities and a boat storage facility, all of which operate seasonally. Two restaurants are located nearby, both of which remain open year round. Planning is underway to open a third restaurant.

The 1969 Master Plan advocated the development of a resort, with a central lodge or restaurant, swimming pool and tennis courts, and surrounding guest units. Due to the seasonal nature of the Marina, serious consideration must be given to whether a development of this scale is economically viable. A more viable option may be the construction of better-equipped RV campsites and up-market cabin developments, particularly in view of the positive public reaction to the development of similar style cabins within Allegany State Park. It may also be possible to extend the area's current season with the promotion of winter sports and fall foliage visits. It is unlikely that private sector concerns would be willing to back any substantial development without the extension of the existing season. (See Map 11, Onoville Marine Park)

# Onoville Marina Park

## Proposed Projects

MAP II

- Proposed Project Boundaries**
-  Steep Slopes (>16% Slopes)
  -  100 - Year Flood Zone (Federal Emergency Management Agency Q3 Flood data, 1998)
  -  Wetlands (National Wetland Inventory, 1995)
  -  Parcel Boundary (Cattaraugus County Real Property Tax, 2000)
  - 

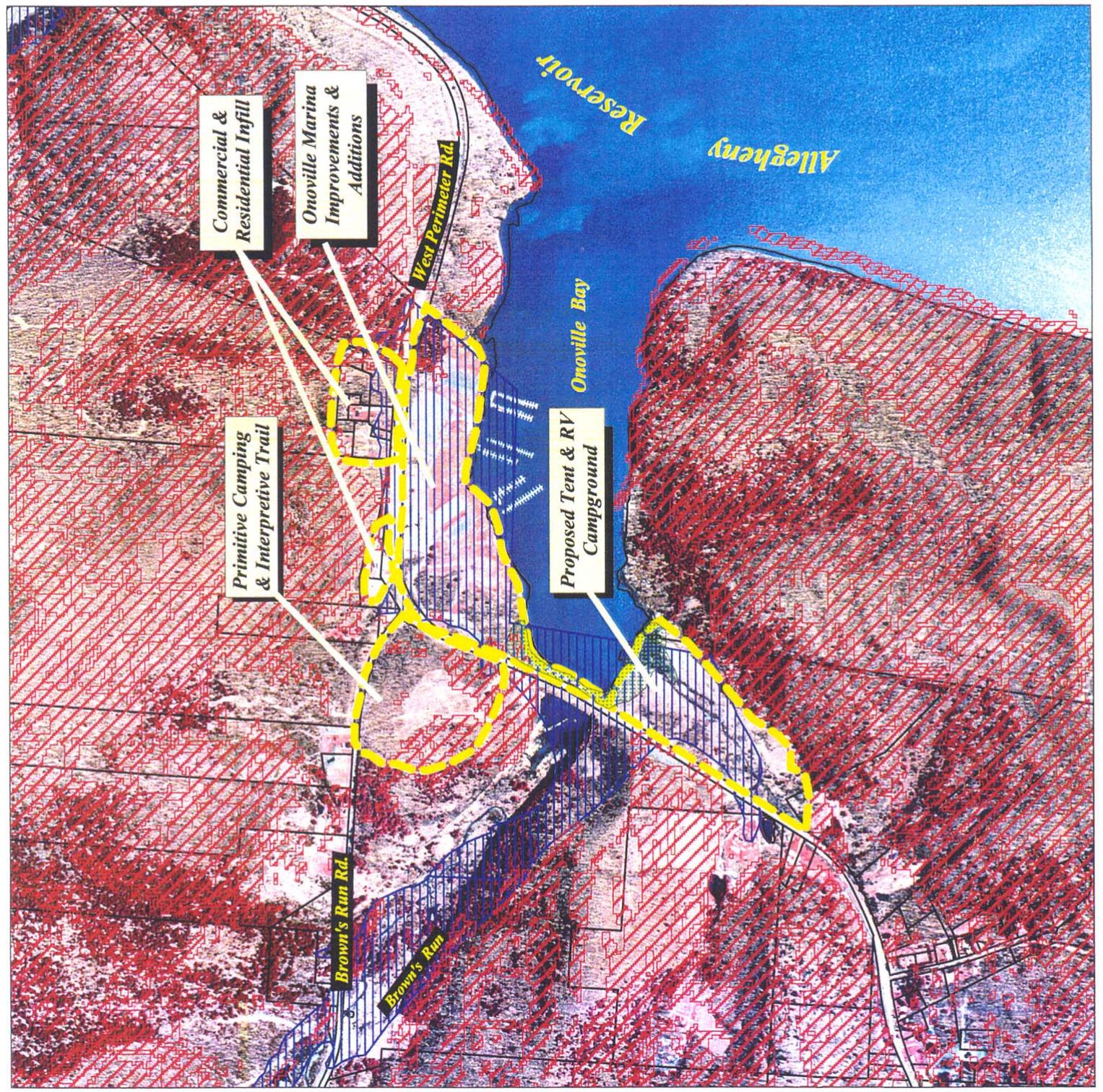


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**Allegany State Park**  
**Perimeter Study**

**Cattaraugus County**



The 1969 Master Plan identified a number of sites for development in the vicinity of the Marina. One of these sites is located in the northwestern portion of the area, with relatively flat slopes, and easy access from Sawmill Run Road. It is, however, within the 100-year flood plain of Sawmill Run. According to the NYS Wetlands Inventory, these are not NYSDEC jurisdictional wetlands, but due to the presence of the flood plain, there may be ACOE jurisdictional wetlands in the area.

Fifteen to twenty acres of the Brown's Run Sector was identified by the Master Plan as suitable for development. West Perimeter Road borders the Brown's Run Sector to the west, to the south it is bordered by private lands and to the east by the Seneca Nation of Indians Reservation and Onoville Bay. This sector is approximately 68 acres; a portion of this land falls within the 100-year flood zone of Brown's Run Creek, while the area in the east of the section and beyond has steep slopes. The land bordering the highway is within the 100-year flood zone with slopes ranging from 5 to 15%. The Sawmill Run Sector is bordered to the east by the West Perimeter Road, to the north by Sawmill Run Road, with private land to the south and west. The County also leases two small land holdings north of Sawmill Run Rd. This sector contains approximately 220 acres, 50 of which are located within the 100-year flood zone of Sawmill Run Creek and the Allegheny Reservoir.

Of the areas proposed for development, the most viable is located on a wooded high ground, southeast of the intersection of Onoville and Sawmill Run Roads. This area is relatively flat – the result of leveling in its previous incarnation as borrow pit, during the construction of the Perimeter Road. There are no NYSDEC jurisdictional wetlands. Due to its elevation, it is unlikely that ACOE jurisdictional wetlands are present. Approximately 70 acres of this land is developable, with easy site access and well-drained soils.

### **3. Estimated Economic Impacts**

This section deals with the economic impacts that may be anticipated as a result of the Route 219 improvements and the demonstration projects associated therewith. It is divided into three sub-sections. The first outlines the economic projections of the New York State Department of Transportation. The second lists the Route 219 Demonstration Projects and their respective economic impacts in terms of job creation and the potential additions to the residential or commercial tax base. The third will address the economic impacts of the Gateway Community Demonstration Projects.

#### **a) New York State Route 219 Economic Impact Predictions**

The NYS Department of Transportation Economic Impact Analysis for Route 219 from Springville to Salamanca was prepared in 1998. This report states that the regions chosen for analysis were those where potential localized impacts of the project could take place. It considered how the proposed project might impact the factors behind the region's economic growth and how the project might alter residential patterns due to the area's increased accessibility or its proximity to areas where greater economic activity may occur. It was deemed that Cattaraugus County, as the site of most of the Route 219 improvements, would experience the most immediate changes in accessibility and travel improvement, with associated increases in the development potential of sites in that area.

The NYSDOT study built on the findings of a previous study conducted by The Saratoga Associates on behalf of the County Legislature. This study established a number of economic development principles, as follows:

- Initially focus on the retention and expansion of existing industries;
- Aim to expand the area's industrial base (rather than retail or seasonal employment);
- Build on the region's strengths and avoid redundant public investments;
- Align the accessibility improvements of the proposed highway with the economic and community development objectives of the affected communities; and
- Look for ways to benefit incrementally as phases of the project are completed.

The “Immediate Impact Area” as defined in this study represented the towns and incorporated villages and cities, such as Salamanca and Limestone, that would likely be most influenced by the proposed improvements to Route 219. The study found that the industrial sectors with the greatest potential for growth, and which could be supported by the improvements to Route 219, were agriculture, distribution, forest-based products, metal fabrication and plastics, specialized retail and tourism related goods and services. This report, and the findings contained therein, was used to prepare the economic forecasts for the Null Alternative. The Cattaraugus County Study made no future year projections for Cattaraugus County, but the NPA estimates matched the Cattaraugus County’s numbers for past years and produced ‘high’ and ‘low’ projections reflecting ‘flat’ growth and an annual growth rate of 1.0% respectively.

Using this methodology, the NYSDOT study projected that employment in Cattaraugus County would increase by nearly 4,000 jobs, from 39,760 in 1995 to 43,660 in 2025 in a no-build situation. This represents an annual rate of growth of 0.31%. The ‘low’ projections represent an annual rate of growth of 0.18%, and the ‘high’ projections represent a 1.00% growth rate. Employment in the County grew from 32,380 jobs in 1970 to 40,020 in 1990. The 7,600-job increase over those 20 years represented an annual rate of growth of 1.06% per year. The recession in the early 1990’s did not have a major impact in Cattaraugus County, where employment dropped by 260 jobs over the 1990-1995 period, an annual rate of decline of -0.13% per year.<sup>29</sup> (See Chart 6 – NYSDOT, Cattaraugus County Employment Forecasts)

## **b) Route 219 Demonstration Project Economic Forecast**

The following job estimates were prepared for planning purposes and were based on the timeframe 2025, assuming that the Route 219 Freeway is constructed by 2005.

1. Ashford Business Center: It is projected that this project would yield a diversity of jobs, if the multi-use character of the development can be achieved. The total number of jobs created over the three phases of the project is estimated in the range of 210 to 300, roughly divided between warehouse and distribution and flex space, and more intensive office and business and incubator activities.

The project could attract some of the growth that will occur at the northern end of the improved road in Cattaraugus County, possibly serving, in part, to absorb a portion of the development that would otherwise scatter around the County.<sup>30</sup>

2. Ellicottville Planned Recreation/Resort Community: As yet, there are no employment projections available for this project.

3. Ellicottville Scenic View Park: It is projected that this project will engender job creation of an estimated 185 to 240, distributed between management, maintenance and operation of the housing and business units and associated amenities. Further positions will be created indirectly in support services related to the additional population.

Second homes bring seasonal population surges, with some beneficial impact in property and retail sales taxes, and indirect benefits from jobs. While they do not require very expensive public school system expansion, they may require water and sewage infrastructure expenditures. The development of several hundred new housing units will substantially increase the residential tax base.<sup>31</sup>

4. Ellicottville Tourism and Cultural Center: The total employment resulting from this project is estimated to fall in the range of 210 to 270 new jobs. The most significant impact would be in the retail and service sectors. It would also provide a good source of employment for artists and artisans. The

project would have a great impact on the local tourism industry, facilitating more intensive use of the existing recreational infrastructure.

While the proposed tourism and visitor's center would require public support, there may also be an opportunity to obtain private funding through philanthropies or other private sources for one or more components of the project.<sup>32</sup>

5. Airport Business Center: The project would expand and diversify job opportunities. Successful airport parks attract jobs of relatively high standards. The total number of jobs that could be created over the three phases of the project is estimated to be in the range of 500, depending upon site density and usage. The majority of new jobs would be related to office and research and development activities, under the proposed development program.

The project supports use of existing recreational attractions in the area, especially the ski resort attractions, by strengthening the connection between corporate locations and the recreational infrastructure. Although the County has approved environmental studies for this project, it has voted not to begin construction in the near future.<sup>33</sup>

6. Great Valley Railyard Industrial Park (Cattaraugus County Crossroads (Rtes 219/I-86)): It is anticipated that this project (located north of the Allegheny River) could result in the creation of between 255 and 345 jobs.<sup>34</sup>

7. Limestone Recreational Sports Vehicle Center: It is estimated that approximately 233 new jobs will be created in Limestone following its development as a Gateway Community Demonstration Project. It must be noted, however, that a substantial percentage of these positions would be seasonal in nature.<sup>35</sup>

8. Salamanca State Park Village: It is estimated that the hotel and conference center, proposed for location in the southwest of the State Park Village on the site of the vacant hospital, will generate 96 jobs. It is further estimated that the north east portion of the site, incorporating an indoor theatre, art fair, farmers market, community performance and event pavilion, retail concessions, a welcome center, parking and picnic areas would generate approximately 585 jobs, a total of 681 jobs for the Salamanca area.

9. Trail Head at Salamanca: The Trail Head in Salamanca will not generate employment in and of itself, as it offers no specific services on-site. It would, however, stimulate spin-off employment opportunities for nearby retailing, restaurant and entertainment facilities.

10. Onoville Marina: The area of Onoville Marine Park that is proposed for development as a hub for retail services, dining, a convenience center and marina commercial support and the lodging/dining and interpretative center is estimated to generate 230 jobs. It is estimated that the additional camping spaces and housekeeper cottages proposed for Onoville Marina will generate approximately 20 new jobs. A total of 250 jobs are estimated.<sup>36</sup>

### **c) Gateway Communities Demonstration Projects Economic Forecast**

Three state park areas were compared for potential demand for the facilities proposed for Cattaraugus County's Gateway Community Demonstration Projects (which included a comparison and analysis of the numbers of visitors to similar attractions and their expenditure on general admission, accommodation, food and entertainment). The following table outlines the number of visitors to (1) Allegany State Park's Red House area and Quaker area, and the separate facilities at (2) Lake Erie State Park, and (3) Long Point Marina.

**Table 14 - Analysis of Visitor Spending for Allegany State Park's Red House Area:**

	Annual Attendance	Estimated Number of Groups	Average Spending per Person	Average Spending per Group	Total Estimated Annual Visitor Spending
Cabins	129,939	43,313	\$18.17	\$54.50	\$2,360,558.50
Campsites	42,938	14,313	\$4.83	\$14.50	\$207,533.67
General Admission	0	0	0	0	0
Marinas	0	0	0	0	0
Other	0	0	0	0	0
Vehicle Use	614,973	204,991	\$2.00	\$6.00	\$1,229,946.00
Total	787,850	262,617	\$4.82	\$14.46	\$3,798,038.17

**Table 15 - Analysis of Visitor Spending for Allegany State Park's Quaker Area:**

	Annual Attendance	Estimated Number of Groups	Average Spending per Person	Average Spending per Group	Total Estimated Annual Visitor Spending
Cabins	108,873	36,291	\$14.00	\$42.00	\$1,524,222.00
Campsites	34,037	11,346	\$4.83	\$14.50	\$164,512.17
General Admission	5,358	1,786	\$10.00	\$30.00	\$53,580
Marinas	0	0	0	0	0
Other	1,190	397	0	0	0
Vehicle Use	511,230	170,410	\$2.00	\$6.00	\$1,022,460.00
Total	660,688	220,229	\$4.18	\$12.55	\$2,764,774.17

**Table 16 - Analysis of Visitor Spending for Lake Erie State Park:**

	Annual Attendance	Estimated Number of Groups	Average Spending per Person	Average Spending per Group	Total Estimated Annual Visitor Spending
Cabins	6,596	2,199	\$18.83	\$56.50	\$124,224.67
Campsites	64,726	21,575	\$5.17	\$15.50	\$334,417.67
General Admission	0	0	0	0	0
Marina	0	0	0	0	0
Other	57,943	19,314	0	0	0
Vehicle Use	23,941	7,980	\$2.00	\$6.00	\$47,882.00
Total	153,206	51,069	\$3.31	\$9.92	\$506,524.33

**Table 17 - Analysis of Visitor Spending for Long Point Marina:**

	Annual Attendance	Estimated Number of Groups	Average Spending per Person	Average Spending per Group	Total Estimated Annual Visitor Spending
Cabins	0	0	0	0	0
Campsites	0	0	0	0	0
General Admission	0	0	0	0	0
Marina	38,615	12,872	0	0	0
Other	1,300	433	0	0	0
Vehicle Use	172,431	57,477	\$2.00	\$6.00	\$334,862.00
Total	212,346	70,782	\$1.62	\$4.87	\$344,862.00

Regional Totals (for Cattaraugus County, Allegany County and Chautauqua County):

On-Site:

	Per Person	Per Group	On Site Visitor Spending
Cabins	\$2.21	\$6.63	\$4,009,005
Campsites	\$0.39	\$1.17	\$706,463
General Admission	\$0.03	\$0.09	\$53,580
Vehicle Use	\$1.46	\$4.37	\$2,645,150

These figures are based on an annual attendance rate of 1,814,090 (as per the year 2000 Regional Attendance Ledger for the Allegany Region, created by the New York State Office of Parks, Recreation and Historic Preservation), an estimated number of groups at 604,697, average spending per person at \$4.09, average spending per group of \$12.26, and total on-site annual visitor spending of \$7,414,200.<sup>37</sup>

The average size of a group of visitors is estimated to be three individuals and the per-person rates cited are based on this assumption. A group is defined as a number of individuals who enter the park in the same vehicle and share the cost of accommodation and is calculated via the maximum occupancy of cabins and campsites as reported by the Park, and the national average vehicle occupancy rate for social and recreational trips. The maximum occupancy of cabins and campsites as reported by Allegany State Park is six. The average national vehicle occupancy rate for social and recreational trips is estimated at 2.1 persons per vehicle.<sup>38</sup>

Potential Off-Site Spending:

	Per Person	Per Group	Total Off-Site Potential Annual Direct Visitor Spending
Food Expenditure	\$20.00	\$60.00	\$36,281,800
Entertainment/Misc	\$15.00	\$45.00	\$27,211,350

The above estimates for off-site expenditures are based on market analysis conducted in similar Upstate New York locations, and annual attendance rates as supplied by the New York State Office of Parks, Recreation and Historic Preservation.<sup>39</sup>

The combined total of potential annual off-site expenditure on food, entertainment and miscellaneous items for the region is \$63,493,150. This is a very substantial figure, which translates into a high level of unrealized spending in Cattaraugus County, particularly in the area in the immediate vicinity of the Park – the Perimeter Zone. This unrealized spending in turn represents an enormous potential market to be capitalized upon, based solely on the modification of the current available facilities. The Gateway Community Demonstration Projects, Limestone, Salamanca and Onoville Marina are excellently positioned to take advantage of this potential trade. By developing the facilities necessary to retain the accommodation, entertainment and food expenditure of the tourist market, the Demonstration Projects have the potential to induce significant increases in spending and job creation.

Potential Induced Spending:

	A	B	C	D
<u>RIMS Multipliers</u>	Retail Trade	Eating & Drinking	Entertainment	Food
Cattaraugus County	1.3181	1.4094	<b>\$8,655,930</b>	<b>\$14,853,769</b>
3-County Region	1.4298	1.5474	\$11,695,438	\$19,860,657

Potential Induced Jobs:

	A	B	C	D
<u>Jobs per \$Million in Output</u>	Retail Trade	Eating & Drinking	Entertainment	Food
Cattaraugus County	19.2	23.4	<b>487</b>	<b>791</b>
3-County Region	23.0	27.0	583	913

The figures highlighted above are perhaps the most pertinent in terms of the on-the-ground revenue and employment generating potential of the Gateway Community Demonstration Projects with the provision of appropriate facilities. For example, based on current rates of visitation and spending by visitors to similar parks with an availability of off-site accommodation, restaurant and entertainment facilities, an estimated 5% of one-day visitors would stay overnight in a hotel room if such accommodations were provided. According to the City of Salamanca Chamber of Commerce, the average cost of a hotel room in Cattaraugus County is \$60.00. This figure, multiplied by 5% of those visitors who stay neither in cabins nor on campsites, and based on two persons sharing comes to a total of \$2,140,470 in revenue for Cattaraugus County. Using the Regional Input/Output Multiplier System, this amount of revenue

translates into approximately 23 full time jobs in the hotel industry for Cattaraugus County, most of which may be assumed to be generated in the Gateway Communities.<sup>40</sup>

#### **4. Theme of the Perimeter Zone**

##### **a) Overarching Themes from Case Studies**

Perimeter zones can be used to advance economic opportunities and enhance the park experience without diminishing the quality of life in perimeter communities.<sup>41</sup> A recent analysis of how communities in other regions have developed “gateways” to major public parkland recommends the overarching themes:<sup>42</sup>

- i) Enhance/diversify the visitors’ experience to encourage extended stays and return visits to the area. This may be accomplished by:
  - Creating four-season recreational opportunities to minimize seasonal fluctuations in the local economy;
  - Encouraging commercial recreational opportunities outside Park boundaries to complement the Park experience; and
  - Creating direct and/or visual linkages between the Park and the gateway to create a logical and seamless transition from public to private commercial uses.
- ii) Build on community assets (e.g., local history, recreational opportunities, and scenic/environmental character) and expand the theme of the Park into the surrounding community to encourage park users to visit the community.

##### **b) Preserve Distinctive Resources as Tourism and Quality of Life Attractors**

- i) Retain what it is that brings people to the region in the first place (scenic, cultural, environmental resources) both within and beyond the Park boundary. The natural or recreational experience both within and outside of the Park often serves as the primary stimulus of the local or regional economy. Practice environmental stewardship.

- ii) Retain distinctive community character through the built environment. Encourage appropriate infill development. Prevent faceless commercial and residential development, strip malls and sign proliferation, and franchise architecture.”

### c) Specific Themes for the Perimeter Zone

The following specific themes are recommended to add content to the overarching themes from the case studies:

#### Nature Component:

The presence of 65,000 acres of protected forest land and open space within the Allegany State Park, and a much larger landscape around the Park, creates a culture and atmosphere to be envied. A theme based on nature embraces the environment and encourages people to take pleasure in their surroundings. This feature of the Park and of the communities around the Park, is one to be capitalized on and marketed, as it is increasingly unique in the built-up North East of the United States. The Park is a wonderful ‘draw’ for the County that should be promoted more actively to attract still future, additional visitors to Cattaraugus County.

Cattaraugus County, unlike much of the United States, boasts year-round seasonal beauty. This natural splendor of steep snow covered slopes in winter, magnificent foliage in the fall and spring, and summer greenery is a very influential natural theme for the Perimeter Zone.

#### Natural Resources, Enterprising Components:

The need for good stewardship can be seen in the fertile agricultural lands and excellent timber resources that exist in Cattaraugus County, and in the enterprising people who have lived on these resources, and who have begun conserving these resources in recent generations. Their survival and successful conservation suggests a second theme for the perimeter zone.

The historic nature of this region is one in which an individual enjoys the freedom of self-expression, and local communities enjoy the benefits of this strong, individual character from one generation to the next.

This history of individual freedom and enduring community character is balanced with wise conservation of natural resources. This balance gives life to the perimeter zone and a sense of well being in the creation of individual and community destinies. This theme encapsulates the human component of the perimeter zones' overall theme.

Multi-Culturalism Component:

The cultural theme of the Perimeter Zone is greatly influenced by the proximity of the Seneca Nation of Indians, the Amish Community, and Allegany State Park. The Seneca Nation, a sovereign nation, is extremely influential in terms of the creation of a diverse, multi-cultural theme that is both colorful and unusual. Salamanca in particular has been culturally influenced by this vibrant community.

The Amish cultural influence is strong in the Randolph area of the Zone, and is a major community located in the western half of Cattaraugus County. This community is a testament to religious freedom in America. The quality of this community's handcrafted items is also a major 'draw' to people from throughout the region.

Allegany State Park is a wonderful 'draw' for the County that should be promoted more actively to attract a diversity of visitors from outside the region. Allegany State park also has an immense influence on the underlying recreational and tourist-oriented theme of the entire County, but particularly of the Perimeter Zone. The Park influences the character of the Perimeter Zone more than any other single feature with the exceptions of the Allegany River and the rolling hills of nearby ski country.

Overall Theme for Perimeter Zone: "Explore and Enjoy":

The components described above broadly define the Perimeter Zone as natural with scenic beauty, enterprising with natural resources, and multi-cultural with the Seneca Nation of Indians, the Amish Country, and the Allegany State Park itself. It is recreational and tourist related, while agricultural and timbering industries continue to support new generations of its citizens, and strong cultural identities continue to protect Native American and Amish religious traditions and lifestyles.

When these diverse aspects are taken as a whole, it suggests an "Explore and Enjoy" theme. The notion of exploring and enjoying the natural beauty of Cattaraugus County, for example, invites adventure sports and outdoor activities such as horseback riding, canoeing, whitewater rafting, hiking and biking, golfing,

hot air balloon riding, boating, water skiing, swimming, snowmobiling, downhill and cross country skiing as well as snowboarding.

On a less strenuous level, the Explore and Enjoy theme invites camping, fishing, nature walks, visits to environmental interpretative centers and trails, viewing wildlife habitats, photography, antiquing, outdoor festivals and art shows.

The many diverse types of activities overlap and combine to create an overall theme that captures the spirit and essence of the perimeter zone. This theme could even help define the region.

Allegheny State Park and its Perimeter Zones is a major ‘hub’ of the region. It provides a central location where outstanding natural beauty and stewardship goes hand in hand with an enterprising character; where farming and forestry have been the mainstays of generations, and where diverse multi-culturalism embraces the traditions of the Seneca Nation of Indians, the Amish Community, and the European settlers. All of these aspects are incorporated into a single thriving fabric of life in Cattaraugus County.

#### Marketing Allegheny State Park:

This theme will be useful to New York State, which faces a new challenge in the coming decades on how to market and advertise its own amenities inside the Park. A useful tool in this endeavor would be the ‘brand naming’ of the region. This marketing method has been used to very good effect in the “First Wilderness” campaign in eastern New York State.

In terms of potential brand names, the notion of “exploring and enjoying” the natural beauty of Cattaraugus County should be a cornerstone. This description allows for the visitor to gravitate towards the adventure implied in ‘exploring’, or alternately, to the more passive enjoyment of walking the trails and appreciating the magnificent scenery of the County. Such advertising should emphasize the fact that this incredible, large scale, natural resource is available within easy reach of major urban centers in the United States and Canada. The commissioning of marketing and/or advertising consultants may prove to be a wise expenditure in terms of creating the most effective and persuasive campaign possible, with the highest achievable yields for this State Park and the region.

A further possibility, which may accrue considerable economic benefits, would be to forge a marketing alliance with Allegheny National Forest and pool marketing budget resources. A more comprehensive and far reaching campaign could be launched by combining funding of Cattaraugus County Gateways, Allegany State Park, and Allegheny National Forest. This would be more effective than those entities working separately, unrelated to each other.

Conclusion:

Cattaraugus County with Allegany State Park at its center, offers a place for people to visit from the mid-west and north-east of the United States, and from the Ontario/Toronto region of Canada. These visitors can discover a fresh pure landscape, unsullied and beautiful, with limited, unobtrusive development. They can discover many outdoor activities from adventure sports to educational walking tours.

This vision is wholesome, healthy and pastoral, evoking a rural community blessed with a magnificent natural environment. Such a vision emphasizes the awareness that this incredible, large scale, natural resource is available within easy reach of many urban centers, yet remains untouched by them – convenient and unspoiled. This analysis represents an extremely useful input to ongoing regional marketing and “branding” studies such as the Chautauqua-Cattaraugus-Allegany Region’s current priority. It is also consistent with the Vision for Cattaraugus County (see Appendix E for the County’s Vision Framework).

The next step in this Allegany State Park Perimeter Study will be to implement this overall theme, with related design principles and standards, and to develop specific, related proposals that are tailor-made for each community around the Park. The challenge for stakeholders in these communities will be to pull these functions and themes together, linking the amenities and attractions functionally in order to yield a more diverse and compelling set of tourist destinations. It is anticipated that this action would increase both the breadth and the depth of the tourist market, ultimately leading to increased revenue and prosperity for Cattaraugus County and all of the people in its diverse population.

## **E. ORIENTING MAJOR STAKEHOLDERS IN PERIMETER ZONES**

Community participation represents an integral part of the Allegany State Park Perimeter Study. As with any such study, the input of community members will be vital to the success of this project, since their knowledge of the region, both physically and socially, is invaluable. Based on that in-depth knowledge, community members are excellent judges of what would or would not represent appropriate development in their district. This spirit of volunteerism forms the bottom line of any community initiative. It involves the grassroots contribution of all community members – both organized groups and individuals – to rally for the good of their community.

In the first stage of this study, TSA conducted a national search for case studies relevant to Cattaraugus County. Seven case studies of planning projects with similar goals to those in Cattaraugus County were described. The projects investigated were: (1) Gettysburg National Military Park, Gettysburg, PA, (2) Rocky Mountain National Park, Estes Park, CO, (3) Darling National Wildlife Refuge, Sanibel Island, FL, (4) Fredericksburg National Military Park, Fredericksburg, VA, (5) Arches and Canyonlands National Military Park, Moab, UT, (6) Catskill Watershed, Catskill Mountains, NY and (7) the First Wilderness Area in New York State. These are scenic locations, which attract a high level of tourist traffic. Each location has suffered a degree of urban or environmental degradation as a result of these high visitor numbers.

These case studies are extremely relevant to the current revitalization efforts of Cattaraugus County, as they represent the pitfalls of allowing development to continue unchecked. The degradation of the natural environment is not only irrevocable in an ecological sense; it also has implications for the tourist industry. If unregulated tourist activity destroys the very amenity that tourists travel to see, then the adjacent centers ultimately lose not only the beautiful natural or historical environment, but also the revenue from the tourist trade it had attracted. In each case study, planning initiatives were introduced re-actively, only after a certain extent of environmental degradation had taken place. Cattaraugus County has chosen to chart its future course wisely, in advance, taking pro-active steps to encourage development while protecting the natural environment, County character, Perimeter theme, and tourist sensitive settings.

The case studies listed above represent an important backdrop to this report because, in addition to offering lessons learned against unregulated development, they serve as examples of the relative merits of

design and planning techniques. In effect, the case studies act as trial runs for optimum planning techniques that may be used in Cattaraugus County to guide future development more wisely. One strikingly successful planning tool used in a number of the case studies was the organization of focus groups. These groups included representatives from the community and local government. They worked together to find planning solutions that were deemed appropriate for their respective communities.

The Southern Tier West Regional Economic Development Strategic Planning Initiative also utilized public participation as a means of optimizing the potential gains of the project. A Task Force was formed by Southern Tier West.

These individuals were then assembled into groups within each of the Strategic Economic Development Priorities. Their task was to establish goals, suggest actions and outline the ideal results for each Priority. Over a series of meetings in January and February 1999, members were asked to share their individual perspectives on how these Priorities could be implemented. The results of these meetings were then synthesized and distilled for inclusion in a draft report, which was endorsed by the Regional Board of Directors in November 1999.

Another major initiative is the Randall Arendt Leadership Training and Visioning Program for Cattaraugus County. The purpose of this planning initiative is to show everyone in Cattaraugus County how to improve the quality of life by saving farmland, protecting property values, discouraging sprawl, preventing environmental problems and promoting open space and trails along with new development. These objectives need to be accomplished while Cattaraugus County changes through the 21<sup>st</sup> Century.

This new service is designed to produce a consensus-based vision for Cattaraugus County's future development, along with a supporting set of guidelines and technical materials that are based on local participation between now and June 2001. Of great importance, Randall Arendt has trained local officials and selected community agency resource people in design concepts and project review skills. He also completed two cases for residential subdivisions and commercial highway frontage, as well as a Development Guidebook for local leaders and property owners. TSA has coordinated its work with Randall Arendt's work.

Randall Arendt is a nationally recognized expert in rural design and conservation planning. He is conducting this program under the County's supervision. The basic challenge is to promote creative new developments throughout Cattaraugus County while at the same time protecting the environment and rural community character that attract people and businesses to the region.

As the examples above attest, this path of communication not only allows for efficient consensus-oriented decision-making, it also encourages a feel-good attitude toward development. Public-private participation, round table group discussions, and sensitivity to local concerns, breeds collaboration, transparency and understanding.

In light of the successes outlined above, it is recommended that a Stakeholder Focus Group process be implemented in Cattaraugus County. The formation process would likely involve break out sessions to which public sector representatives and potential stakeholders would be invited. At this session, those present could review the findings of Tasks 1 and 2 of the Perimeter Study.

A Project Initiation Meeting was held on November 28<sup>th</sup>, 2000. Representatives attended from the Towns of Ellicottville, Carrollton, Great Valley, Allegany, Salamanca, Randolph, and New Albion, the Village of Limestone, the Seneca Nation of Indians, and Allegany State Park. A PowerPoint presentation was made by TSA, outlining the key points of the Perimeter Study's scope of work.

The process of planning for growth and environmental conservation around Allegany State Park has begun. It will take many decades to achieve the major concepts that are represented in this market analysis and the ten demonstration projects. Community-based, collaborative activities are recommended, with County-level guidance and coordination.

# PARK PERIMETER

# LAND USE MAP

- Agriculture
- Residential
- Vacant
- Commercial
- Recreation and Entertainment
- Community Services
- Industrial
- Public Services
- Forested
- Reservation
- Roads / Road ROW
- No Data



6000 0 6000 12000 18000 Feet

Source: Cattaraugus County Office of Real Property and Assessment

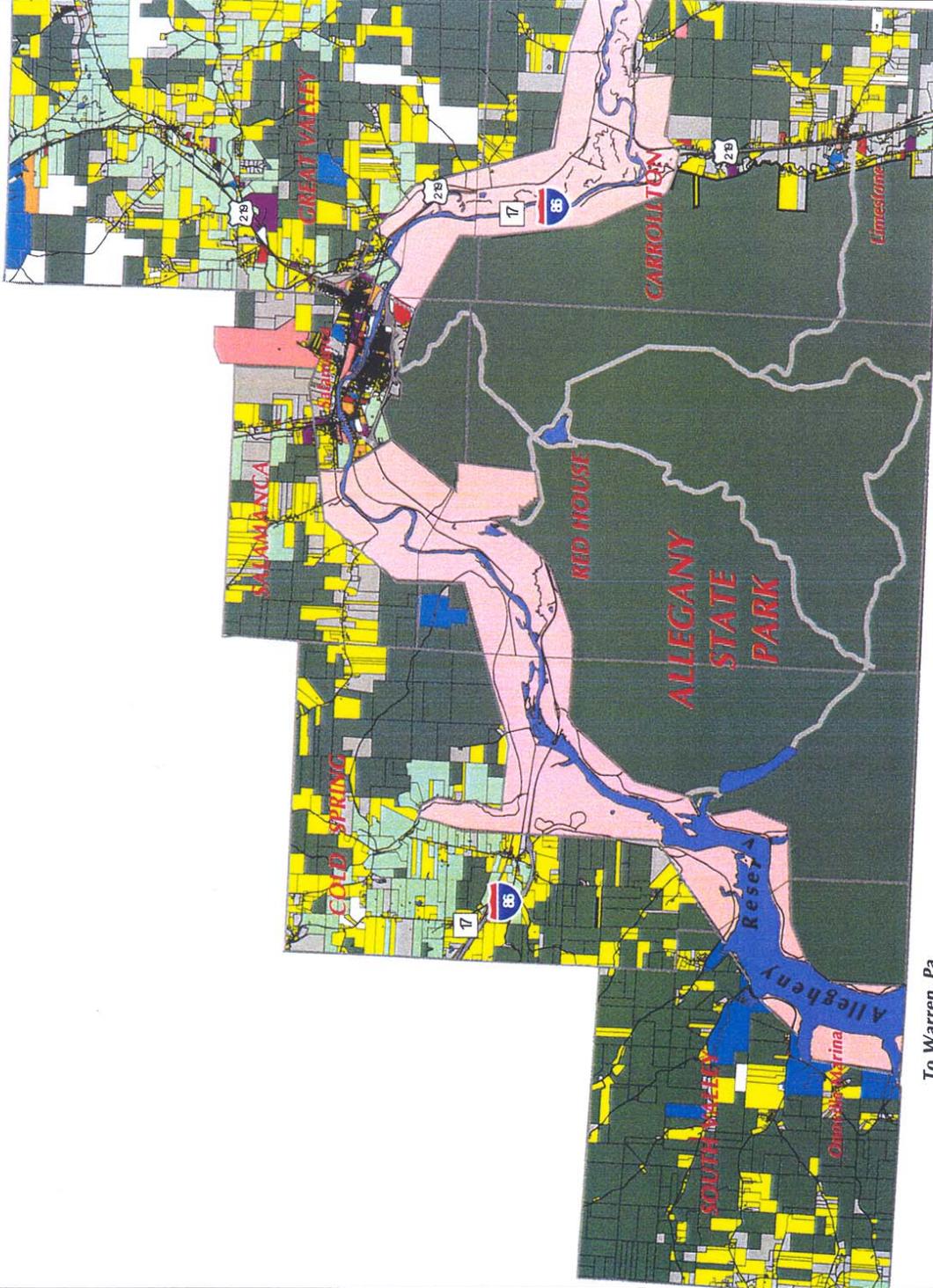
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# Allegheny State Park Perimeter Study

# Cattaraugus County



To Warren, Pa.

Allegheny National Forest

To Bradford, Pa.

# CITY OF SALAMANCA

## LAND USE MAP

- Agriculture
- Residential
- Vacant
- Commercial
- Recreation and Entertainment
- Community Services
- Industrial
- Public Services
- Forested
- Reservation
- Roads / Road ROW
- No Data
- City Boundary



Source: Cattaraugus County Office of Real Property and Assessment  
Saratoga Springs, New York City and Boston

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**Allegany State Park  
Perimeter Study**

**Cattaraugus County**



# Village of Limestone

## Land Use Map

- Agriculture
- Residential
- Vacant
- Commercial
- Recreation and Entertainment
- Community Services
- Industrial
- Public Services
- Forested
- Reservation
- Roads / Road ROW
- No Data
- Village Boundary



600 0 600 1200 1800 Feet

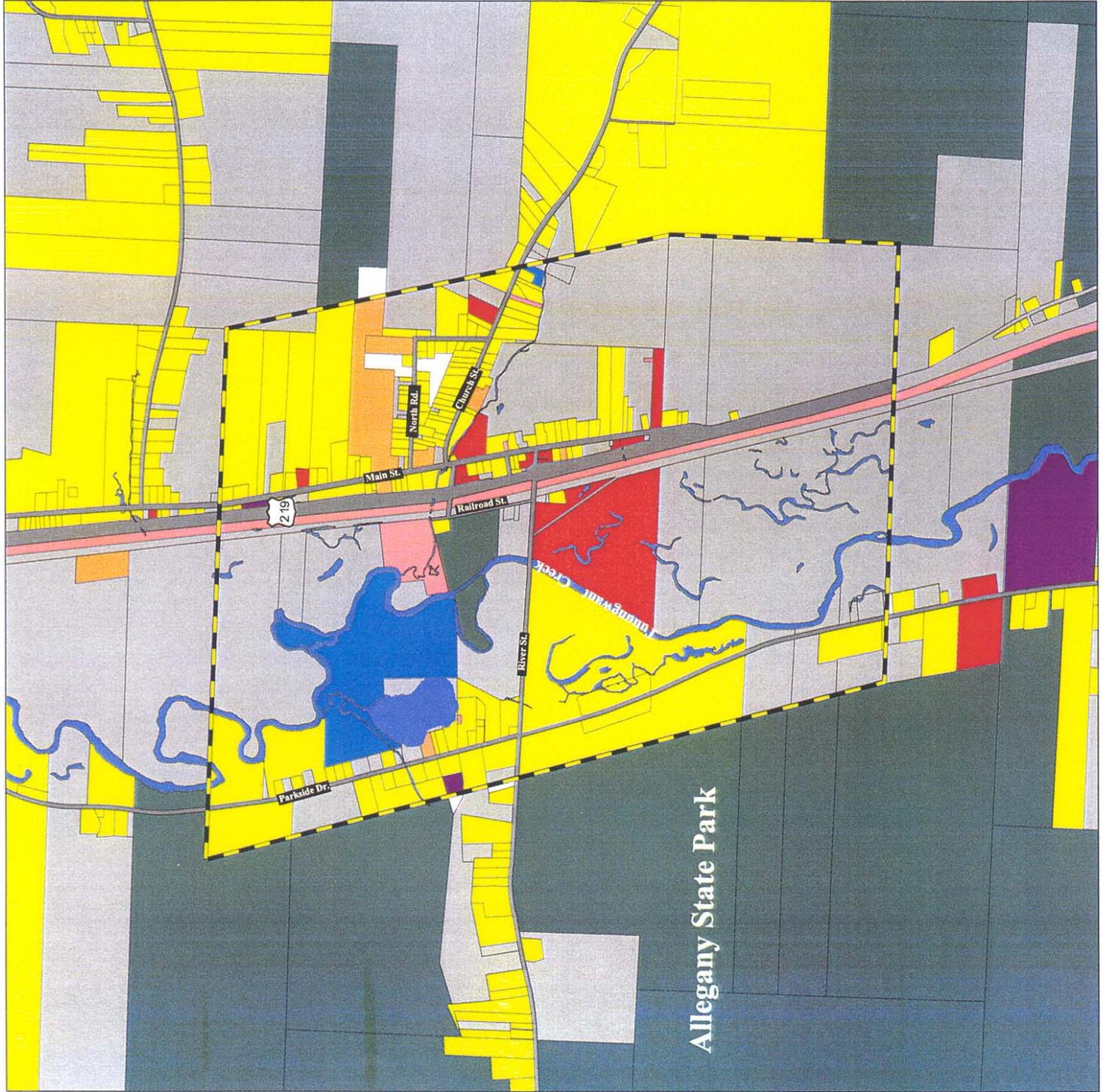
Source: Cattaraugus County Office of Real Property and Assessment  
Saratoga Associates, Inc. of Saratoga Springs, New York

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Perimeter Study

Cattaraugus County



# Onoville Marina Park

## Land Use Map

- Agriculture
- Residential
- Vacant
- Commercial
- Recreation and Entertainment
- Community Services
- Industrial
- Public Services
- Forested
- Reservation
- Roads / Road ROW
- No Data



600 0 600 1200 1800 Feet

Source: Cattaraugus County Office of Real Property and Assessment

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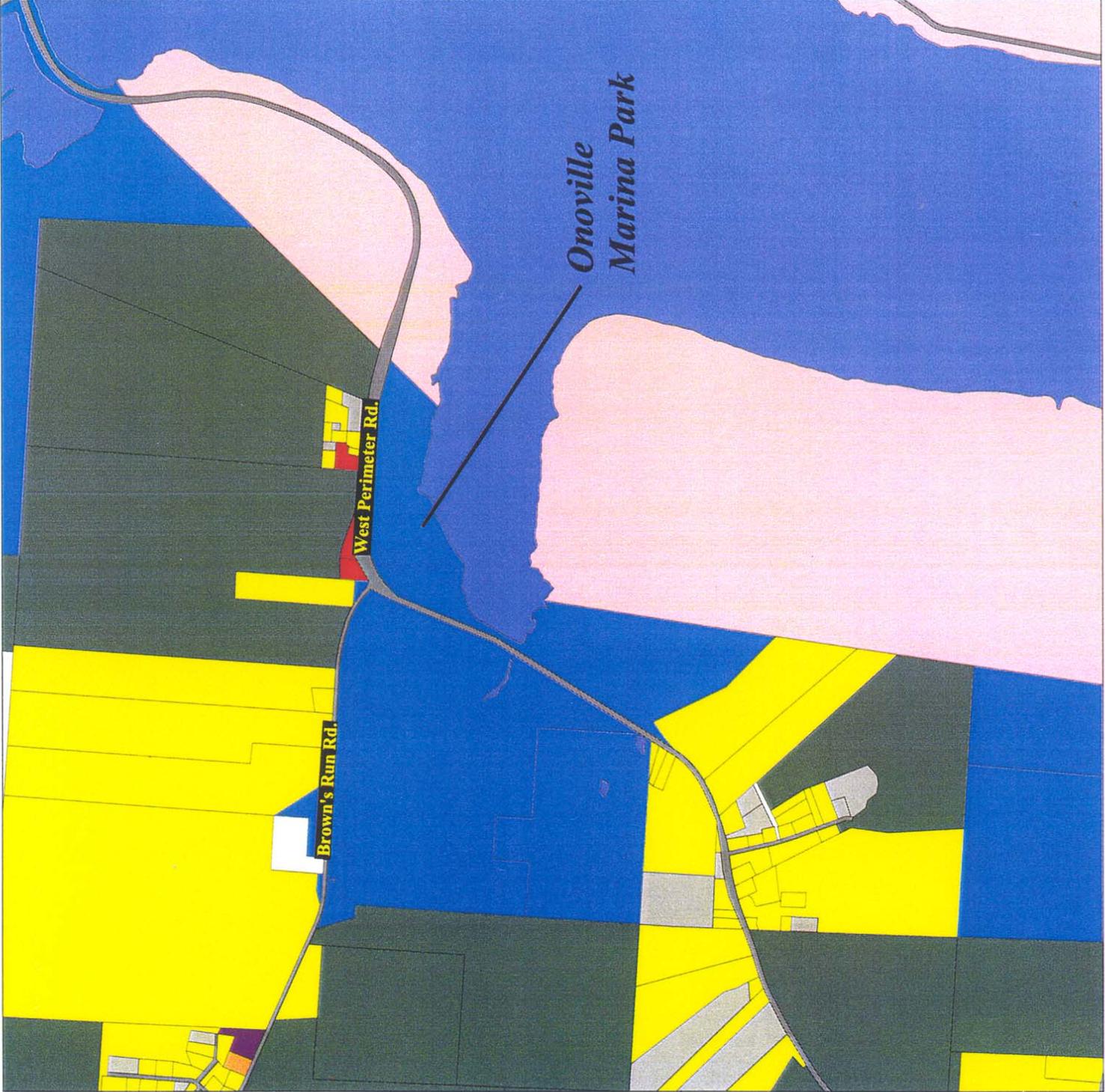
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# Allegany State Park Perimeter Study

# Cattaraugus County



## **APPENDIX B**

### **Allegheny State Park Limestone Entrance Component Road Sections**

**Allegany State Park Limestone Entrance Component Road Sections**

Feature	Jurisdiction	Description	Length (miles)	Construction	Design/Other	Total	Funding Sources	Schedule
Bailey Drive	Limestone (V)	A	0.62	\$480,000	\$169,000	\$649,000	NYS DOT/Marchiselli	2004
Limestone Run Road	Limestone (V)	A	0.18	140,000	50,000	190,000	Limestone	2002
Limestone Run Road	Carrollton (T)	A	1.91	1,470,000	516,000	1,986,000	Carrollton	2003
Limestone Run Road	Carrollton (T)	B	0.97	750,000	264,000	1,014,000	Carrollton	2001
Limestone Run Road	Allegany State Park	C	2.35	1,800,000	630,000	2,430,000	NYSOPR Capital Program	2000
Carrollton Bridge #11	Cattaraugus County	D	110ft	800,000	281,000	1,081,000	NYS DOT/County	2004
<b>Total Costs</b>				<b>\$5,440,000</b>	<b>\$1,910,000</b>	<b>\$7,350,000</b>		

- A = 18 feet wide, 5 foot shoulders, asphalt less than 7 inches
- B = 14 feet wide, 5 foot shoulders, asphalt less than 7 inches
- C = 14 feet wide, 2 foot shoulders, gravel/asphalt less than 7 inches
- D = 18 feet wide, 3.75 foot shoulders, open grate decking

Construction costs include survey, maintenance and protection of traffic, mobilization and 10% contingencies. Construction cost estimate prepared by NYS DOT with information prepared by Cattaraugus County and OPR, assumes the following:

Reconstruction and widening of existing pavement sections to two 10 foot lanes with two 5 foot shoulders;  
 No alignment changes or additional right of way required;  
 Roadway section to consist of 9 inch sub-base and a 7 inch asphalt cement concrete (ACC) pavement, 4 inch ACC shoulders, underdrain along both sides, cross culverts every 1500 feet, 50 drainage structures, weak post corrugated guard rail along 25% of each shoulder, and the necessary clearing, grubbing, excavation, signing, seeding, and striping.  
 Design/Other costs include design/engineering (20%) and inspection (15%)

## **APPENDIX C**

### **Department of Transportation Traffic Projections Segment Traffic Volume Comparison**



### E.3.e Traffic Volumes

#### Upgrade

The 1.5%/yr growth in trips modeled on the new network containing the Upgrade Alternative combined with the long distance trips diverted to the improved highway results in moderate traffic growth in the U.S. Route 219 corridor. The projected traffic volumes are presented in Table E.3-6, and in Figures E.3-4 and E.3-5. The bypasses proposed for this alternative will divert significant traffic from U.S. Route 219. The amount of this diversion is presented below:

- **Salamanca Bypass:** This bypass will divert traffic from Central and Wildwood Avenues in Salamanca. Traffic in 2025 on Central was forecast to be 37 percent lower than if the bypass were not built. On Wildwood it was forecast that there would be a 17 percent reduction in traffic between the 2025 No Build and 2025 Upgrade Alternative. Option B which provides At-Grade access to Route 417 creates local diversions to/from the bypass. 2025 upgrade traffic volumes which take in to account these diversions are also shown on Figure E.3-4.
- **Ellicottville Bypass:** The bypass will carry 940 vehicles during the peak hour. This represents about 69 percent of the north/south traffic in Ellicottville. The traffic on Washington Street in Ellicottville was estimated to be 59 percent less than would exist in 2025 without the Upgrade.

#### Freeway

The combination of the base 1.5%/yr growth in trips combined with notable traffic diversions from local parallel routes and other long distance routes would produce significant increases in traffic in the corridor. The freeway would also divert sufficient traffic from the existing U.S. Route 219 to reduce future traffic volumes below current levels. Figures E.3-6 and E.3-7 show projected 2025 Freeway Alternative traffic volumes. A discussion is provided below.

- **Salamanca Section:** Access to Salamanca will be via Hickory Street and there is a new interchange proposed with N.Y. Route 17 on the south side of the Allegheny River. This section of the proposed Freeway is projected to carry a peak hour volume of about 1400. On Central Avenue north of Route 417 traffic volumes were projected to decrease by 16 percent from current levels and by 42 percent from projected no-build volumes. On Route 417 east of Central the volumes were projected to increase by 26 percent above what exists today but would still decrease by 13 percent from the projected no-build volumes. West of Central on Route 417 the projections showed an 7 percent increase over current volumes and a 25 percent decrease from projected no build volumes.
- **Salamanca to Ellicottville:** The Freeway in this section will carry about 75 to 80 percent of the corridor traffic. This will reduce traffic on existing U.S. Route 219 to about 500 vehicles per hour during the peak hour, which is 30% less than existing traffic, and 53% less than what is projected for the Null Alternative.



- *Village of Ellicottville: The freeway would provide a bypass around Ellicottville for north/south through traffic. However, it is unlikely that it would be used by most local traffic because there is no interchange near Holiday Valley Road. The nearest interchange south of Ellicottville would be in Great Valley near C.R. 18 - Humphrey Road. The freeway section between the Ellicottville Interchange and Great Valley would carry 1220 vehicles in the peak hour. In Ellicottville, Washington Street will carry about 570 vehicles in the peak hour, and Jefferson Street will carry about 500 vehicles. This is about 20% less than existing peak hour volumes on these segments.*
- *Ellicottville to Peters Road Interchange: During the peak hour the freeway will carry 1470 vehicles per hour. Existing U.S. Route 219 will carry 370 to 520 vehicles per hour, 30% to 70% of the traffic forecast for existing U.S. Route 219 with the Null Alternative.*
- *Springville Section: Traffic volumes at the U.S. Route 219/Route 39 intersection with the Freeway Alternative will decrease by 7 percent from existing volumes, and 36 percent from the 2025 Null Alternative volumes. South of N. Y. Route 39, traffic volumes in the U.S. Route 219 commercial corridor would decrease by 46 percent compared with the no-build case.*



**Table E.3-6**  
**U.S. Route 219 - Segment Traffic Volume Comparison**

AADT - Annual Average Daily Traffic									
Seg. No.	Existing Highway Segment	1996 Existing AADT	2025 No-Build AADT	2025 Upgrade			2025 Freeway		
				Old U.S. 219 AADT	4-Lane Upgrade AADT	Total AADT	Old U.S. 219 AADT	Freeway AADT	Total AADT
1	Bus Rt. 219, Exit 23 to Rt. 417	3,250	5,000	3,140		3,140	3,430		3,430
2	Bus Rt. 219/Rt. 417 to end Rt. 219 overlap	4,750	6,800	5,500		5,500	5,890		5,890
3a	Rt. 17 Exit 23 to Exit 22	10,750	15,400	21,800		21,800	21,700		21,700
3b	Rt 17 Exit 22 to Exit 21	10,750	15,400	14,570		14,570	16,140		16,140
4	Rt. 219, Exit 21 to Rt. 417	4,850	6,950	4,910	8,800	13,710	8,000	11,120	16,120
5	Rt. 219/Rt. 417 to end Rt. 219 overlap	8,250	11,800	9,810	8,800	18,610	8,830	11,120	19,950
6	Rt. 219, Rt. 417 to Salamanca N. City Line	6,800	9,500	5,990	8,800	14,790	5,500	11,120	16,620
7	Rt. 219, Salamanca N. City Line to Rt. 98	6,400	9,200		12,860	12,860	3,730	11,930	15,690
8	Rt. 219, Rt. 98 to Rt. 242 overlap	7,150	10,300		13,940	13,940	4,910	11,950	16,860
9	Rt. 219, Rt. 242 overlap to County Rt. 71	6,750	9,700	4,320	11,000	15,320	5,500	11,960	17,450
10	Rt. 219, County Rt. 71 to end Rt. 242 overlap	7,050	10,130	4,120	11,000	15,120	5,590	11,960	17,540
11	Rt. 219, end Rt. 242 overlap to County Rt. 12	6,400	9,150		12,760	12,760	3,630	14,460	18,090
12	Rt. 219, County Rt. 12 to Erie County Line	6,600	8,500		13,940	13,940	5,100	13,390	18,490
13	Rt. 219, Erie County Line to east end Rt. 39 overlap	12,000	17,250		21,690	21,690	9,220	15,560	24,780
14	Rt. 219, east end Rt. 39 overlap to west start of Rt. 39 overlap	12,600	18,250		22,570	22,570	11,680		11,680
15	Rt. 219 north of Rt. 39	8,780	12,610		16,880	16,880	17,540		17,540

DHV - Design Hour Volume									
Seg. No.	Existing Highway Segment	1996 Existing DHV	2025 No-Build DHV	2025 Upgrade			2025 Freeway		
				Old U.S. 219 DHV	4-Lane Upgrade DHV	Total DHV	Old U.S. 219 DHV	Freeway DHV	Total DHV
1	Bus Rt. 219, Exit 23 to Rt. 417	330	510	320		320	350		350
2	Bus Rt. 219/Rt. 417 to end Rt. 219 overlap	485	695	580		580	600		600
3a	Rt. 17 Exit 23 to Exit 22	1,098	1,570	2,220		2,220	2,210		2,210
3b	Rt 17 Exit 22 to Exit 21	1,095	1,570	1,485		1,485	1,645		1,645
4	Rt. 219, Exit 21 to Rt. 417	495	710	500	900	1,400	510	1,135	1,645
5	Rt. 219/Rt. 417 to end Rt. 219 overlap	840	1,205	1,000	900	1,900	900	1,135	2,035
6	Rt. 219, Rt. 417 to Salamanca N. City Line	675	970	610	900	1,510	680	1,135	1,695
7	Rt. 219, Salamanca N. City Line to Rt. 98	650	936		1,310	1,310	380	1,215	1,595
8	Rt. 219, Rt. 98 to Rt. 242 overlap	730	1,050		1,420	1,420	500	1,220	1,720
9	Rt. 219, Rt. 242 overlap to County Rt. 71	690	990	440	1,120	1,560	560	1,220	1,780
10	Rt. 219, County Rt. 71 to end Rt. 242 overlap	720	1,036	420	1,120	1,540	570	1,220	1,790
11	Rt. 219, end Rt. 242 overlap to County Rt. 12	660	930		1,300	1,300	370	1,475	1,845
12	Rt. 219, County Rt. 12 to Erie County Line	675	970		1,420	1,420	520	1,965	1,886
13	Rt. 219, Erie County Line to east end Rt. 39 overlap	1,225	1,760		2,210	2,210	940	1,585	2,525
14	Rt. 219, east end Rt. 39 overlap to west start of Rt. 39 overlap	1,285	1,860		2,300	2,300	1,190		1,190
15	Rt. 219 north of Rt. 39	895	1,285		1,720	1,720	1,785		1,785

## **APPENDIX D**

Department of Transportation's Projected Potential Long-Term Development Impacts in  
Project Area



#### 4.4 Potential Long-Term Development Impacts in Project Area

Estimates of the potential long-term economic impact in the project area, including southern Erie County and Cattaraugus County, were based on the local development advantages provided by improved access to the expressway and Interstate network. The improvement alternatives would reduce travel time within the corridor and improve connections to U.S. Route 219 Expressway to the north and to N.Y. 17/Southern Tier Expressway to the south.

In comparing the development potential of the Upgrade and Freeway Alternatives, the most important factors were:

- *The Upgrade Alternative, while providing substantial benefits over the existing roadway system, would provide approximately half the travel time benefit (13 minutes compared to 22 minutes) of the Freeway Alternative;*
- *The Upgrade Alternative would remain an arterial roadway, with improved frontage opportunities for businesses. Most of the roadside development would be retail and related service operations rather than export-oriented industries; and*
- *With the Upgrade Alternative, a gap would still remain in the region's network of Interstates and expressways between Springville and Salamanca. Businesses looking for a new location and travelers seeking route options would see the distinction on highway maps when planning their trip. The 45 km long connection between the U.S. Route 219 Expressway and N.Y. Route 17 appears as a winding U.S. highway, with overlaps on N.Y. Route 242 and N.Y. Route 417, and passes through a number of hamlets, villages and the City of Salamanca. Travel time differences would actually be small, but the availability of or proximity to an expressway can affect people's perceptions regarding the attractiveness of a given route or sites along it.*

The types of developments projected for each alternative do not represent direct, cause-and-effect employment impacts. As mentioned above, many different factors are needed to stimulate economic development. Rather, these forecasts are examples of the types of developments that would be more likely to happen with the support of these improvements.

Four important considerations of our study in estimating the local long-term impacts of the proposed roadway improvements were:

- **Cattaraugus County Study** — *the study listed six demonstration projects, out of more than thirty possible development opportunities if a freeway were built, and estimated their employment potential (see Section 4.2 above for further details regarding these projects). The Cattaraugus County Study acknowledged that the county and others would need to make a concerted coordinated effort to take advantage of the relatively modest, yet important, opportunities that the proposed improvements would provide. It emphasized the need to use the boost provided by an improved U.S. Route 219 to expand and develop "export" type industries – i.e., those that meet a demand for goods and services outside of the region, thereby bringing more income and jobs*



into the area. The study also discussed how growth in one part of the county could spin off growth in other areas of the county and in adjacent counties.

- **Review of Site Development Potential** – the balance of the thirty possible development opportunities listed in the Cattaraugus County Study were looked at in terms of possible locations (towns or areas within towns), distance to interchanges and other key roadways, the availability, cost, current use and zoning of nearby land, and the available infrastructure necessary for development (water, sewer, power and other utilities, etc.). The market potential of likely industries for these sites, both nationally and within the region, were also reviewed as key consideration.
- **Survey Results** — the results of our survey of major employers throughout the region, and in particular in the Southern Tier portion of the project's study area, focusing on the likely importance of the proposed highway improvements in decisions to locate or expand businesses in the corridor (details on these surveys are provided in Section 6 of this report);
- **Review of Other Studies** — a review of other studies performed for similar highway projects, indicating the likely range of localized development that could occur and the relation of that growth to the region's overall growth (see Section 1 for examples of such studies).;

General areas were looked at to provide a sense of the likely availability of sites, development constraints that might be faced, and the possible range of industries that could take advantage of these. The project team looked at each of the thirty development opportunities in the Cattaraugus County Study, and estimated the possible employment impact of each by alternative. While the Cattaraugus County Study was premised on the construction of a freeway along U.S. Route 219, some of the development opportunities would be possible without any highway improvements. Some may develop to a greater or lesser extent under one of the build alternatives. For example, strip development potential along existing U.S. Route 219 in some areas would be higher under the Upgrade Alternative than under the Freeway Alternative.

These projections do *not* mean that these specific developments – project “X” at location “Y” — would *directly* result from the proposed roadway improvements. Some of these developments may happen as shown, maybe in a different form or size, or may not happen at all. At the same time, other similar developments not listed could happen, supported by the same benefits of improved highway access. The Cattaraugus County Study stressed that such developments would need a number of proactive measures by various local agencies, including highway improvements, for them to actually be realized. The actions required of the county included:

- *extensive marketing campaigns to sell the merits of the county to the national development community;*
- *actions to identify and attract specific development prospects (direct mail to businesses, working with site selection consultants, hosting industry tours for business leaders, etc.);*



- *developing recruitment and marketing materials suitable to an economic development campaign; and*
- *actions to market specific development concepts (e.g., a county business center, hotel/resort concepts, etc.).<sup>1</sup>*

The Cattaraugus County Study named six "demonstration projects," which they planned to actively promote. They include:

- *Ashford Business Development Center*
- *Tourism, Cultural Arts and Crafts, Entertainment and Trail Head Center*
- *Airport Business Center*
- *Planned Recreation Resort Community*
- *County Business Center*
- *Limestone Gateway Center*

The county estimated these six projects would support between 3,700 and 4,470 jobs in Cattaraugus County. Twenty-four other development opportunities were identified in the county's study, ranging from nursery garden centers, to specialty retail centers, to seasonal home developments to ski area developments.

Table F.4-3 below lists the long-term job growth potential at possible local developments in the immediate project area in southern Erie County and Cattaraugus County. As discussed above, these estimates were based on:

- *Cattaraugus County's job projections for the six demonstration projects named in their study;*
- *job growth potential of the 24 other development opportunities identified in the Cattaraugus County Study;*
- *consideration of the types of development (hotels, motels, large recreational complexes) that typically would locate near Interstates of other similar highway facilities, which could be expected with the Freeway Alternative*
- *consideration of the types of strip development that are typical along suburban and rural arterial highways, which could be expected with the Upgrade Alternative;*
- *development potential near the project area in the Town of Concord in southern Erie County;*
- *results of surveys of area business leaders, agencies, and government officials regarding the likelihood of development.*

The Cattaraugus County Study's list of 30 development opportunities was considered to be a reasonable estimate of the types of development that could occur in the corridor over a 20-25 year time period following the construction of highway improvements. To estimate the job growth potential for these developments under each of the project alternatives, the project team relied on judgment and experience gained over years of studying these kinds of issues. Input from the community gained by the Cattaraugus County Study and through the public outreach activities on this project, including the interviews of area business leaders and the survey questionnaire, were primary resources used in



developing these estimates. Other considerations included availability and costs of other services (water, sewers, gas and electric), the highly trained local labor force, and the proximity to population centers and markets in western New York, the Southern Tier, southern Ontario, northern Pennsylvania and Ohio. Table F.4-3 presents these estimates of the long-term job growth that could be induced in the project area by the types of highway improvements included under the Upgrade and Freeway Alternatives.

Section 4.5 includes a discussion of secondary job impacts which would be stimulated by these new local developments, with the total job impact of this development summarized in Table F.4-4. Table F.4-5 then distributes local job impacts by township and industry group. As indicated, the Upgrade Alternative is projected to support fewer, and often smaller, developments than the Freeway Alternative.

Table F.4-3 Long-Term Local Development Opportunities

Town	Example Development Opportunity [1]	Development Type	Floor Area Ratio (a)	m <sup>2</sup> /Job (b)	Upgrade Alternative		Freeway Alternative	
					Site Requirements (hectares) (c)	Job Potential $axcx10^4$ b	Site Requirements (hectares) (c)	Job Potential $axcx10^4$ b
Concord	Hotels / Motels	Hotel	0.40	75	2.80	150	7.50	400
	Expanded Retail / Specialty Stores	Retail	0.25	45	2.70	150	5.40	300
	Industry / Distribution Center	Industrial	0.20	55	8.30	300	13.80	500
Ashford	Ashford Business Development Center	Office	0.30	25	2.90	350	5.80	700
	Nursery Garden Center	Retail	0.25	45	0.90	50	0.90	50
	Year-round Housing	Specialty	0.01	45	9.00	20	18.00	40
	Camping	Specialty	0.02	45	13.50	60	22.50	100
Ellicottville	Tourism Cultural Arts and Crafts, Entertainment and Trail Head Center	Retail	0.25	45	3.60	200	4.50	250
	Specialty Retail Center	Retail	0.25	45	1.10	60	0.90	50
	Research and Development Center	Office	0.30	25	0.00	0	1.30	150
	Retirement Community	Specialty	0.03	45	7.50	50	22.50	150
	Seasonal Home Development	Specialty	0.01	45	13.50	30	22.50	50
	Bus Tours	Services	0.25	30	0.20	20	0.20	20
	Covered Ice Rink	Services	0.25	30	0.10	10	0.10	10
Great Valley	Airport Business Center	Office	0.30	25	0.80	100	1.30	150
	Planned Recreation Resort							
	Community	Services	0.25	30	0.00	0	0.70	60
	Strip Retail Center	Retail	0.25	45	4.50	250	3.60	200
	Lake Based Resort	Specialty	0.03	45	3.00	20	7.50	50
	New Lake/Pond	Specialty	0.01	45	9.00	20	18.00	40
Salamanca	County Business Center	Industrial	0.20	55	20.60	750	66.00	2400
	Business Communication, Services and Long-distance Learning Center	Office	0.30	25	0.40	50	0.40	50
	Indian Cultural and Reservation Center	Services	0.25	30	1.20	100	4.20	350
	Hotel/Motel	Hotel	0.40	75	0.90	50	1.90	100
	Centers for Antiques, Arts and Crafts	Retail	0.25	45	1.30	70	1.80	100
	Amusement Park	Specialty	0.05	45	9.00	100	40.50	450
	Expanded Bingo Complex	Services	0.25	30	0.50	40	0.60	50
Rest of Catt.	Limestone Gateway Center	Services	0.25	30	0.60	50	4.80	400
	Lodge	Specialty	0.05	45	0.00	0	13.50	150
	County Fairgrounds	Specialty	0.05	45	1.80	20	1.80	20
	County Museum Expansion	Specialty	0.05	45	1.80	20	0.90	10
	Ski Area Development (Kingbrook, Poverty Hill)	Specialty	0.01	45	54.00	60	90.00	100
	Factory Outlet	Retail	0.25	45	5.40	300	7.20	400
	Industrial Incubator Facility	Industrial	0.20	55	1.40	50	9.60	350
	Total Erie County (Town of Concord)				13.90	600	26.7	1200
	Total Cattaraugus County				168.50	2900	373.5	7000
	Total Project Area				182.30	3500	400.2	8200

[1] For Cattaraugus County, example development opportunities were obtained from the Cattaraugus County Study.

Source: De Leuw, Cather & Company



## 4.5 Secondary Economic Impacts

As discussed in Section 4.4, the proposed project could increase the potential for long-term employment in areas near the project (i.e., in Cattaraugus County and southern Erie County) that would more likely develop because of improved accessibility. To the extent that increased local development occurs, the income generated by these new activities would percolate through the local economy, creating **secondary** indirect employment opportunities. This economic development factor is commonly referred to as the **multiplier effect**.<sup>1</sup>

The size of such multipliers depends on the extent to which the income generated by one sector's growth is kept within the region — i.e., is spent on goods and services provided by other businesses in the region, rather than being spent outside the region. Understandably, large, well-integrated economies tend to have higher multipliers, since they provide a wider range of goods and services internally. Conversely, in a small economy, or one that depends heavily on a single sector, it may be difficult to obtain many goods and services locally, and their multiplier effect would be smaller. Employment multipliers can range from 1.2 to 1.3 for smaller, rural areas, to 2.0 or higher for larger, densely developed urban areas.

Regional Input-Output Modeling System (RIMS II) "multipliers" provided by the U.S. Department of Commerce, Bureau of Economic Analysis (BEA) were used in this analysis. While RIMS II multipliers are available for 38 different industrial sectors, a simplified weighted-average multiplier was used in this analysis, reflecting the approximate nature of these projections. The weighted-average RIMS II multiplier for Cattaraugus County was 1.35 - i.e., every 100 new jobs realized from new local developments would spin off approximately 35 additional jobs in the local economy. The weighted-average RIMS II multiplier for Erie County was 1.80, reflecting a larger, better integrated economy compared with Cattaraugus County. The resulting total employment impact is shown in Table F.4-4. Table F.4-5 distributes these jobs by town and employment category based on the location and distribution of industries in those areas.

**Table F.4-4**  
**Total Potential Long-Term Job Impacts**

	Cattaraugus	Southern Erie County
RIMS II Average Multiplier (M)	1.35	1.80
Jobs Resulting from Local Development (D)	2,900	600
Secondary Job Impacts = $D \times (M-1)$	1,020	480
<b>Total Potential Long-Term Job Impact</b> (Net change from Null Alternative)	<b>3,920</b>	<b>1,080</b>
Jobs Resulting from Local Development (D)	7,000	1,200
Secondary Job Impacts = $D \times (M-1)$	2,450	960
<b>Total Potential Long-Term Job Impact</b> (Net change from Null Alternative)	<b>9,450</b>	<b>2,160</b>

Source: De Leuw, Cather & Company

<sup>1</sup> This type of long-term "secondary" employment effect is different from the "indirect jobs" term used to assess more short-term construction period employment impacts, as shown in Table F.3-1



**Table F.4-5  
Potential Long-Term Development Impacts by Town and Industry**

Employment Category	Town	# of Jobs [1]	
		Upgrade Alternative	Freeway Alternative
<b>Southern Erie County</b>			
Manufacturing/Mining	Concord	200	350
Office/Government	Concord	300	760
Retail/Services	Concord	580	1050
<b>Erie County - Total Jobs from Local Development</b>		<b>1080</b>	<b>2160</b>
<b>Cattaraugus County</b>			
Manufacturing/Mining	Ashford	100	150
Office/Government	Ashford	200	400
Retail/Services	Ashford	250	400
Manufacturing/Mining	Ellicottville	10	200
Office/Government	Ellicottville	150	300
Retail/Services	Ellicottville	240	350
Manufacturing/Mining	Great Valley	20	50
Office/Government	Great Valley	30	150
Retail/Services	Great Valley	350	400
Manufacturing/Mining	Salamanca	300	1000
Office/Government	Salamanca	300	750
Retail/Services	Salamanca	650	2000
Manufacturing/Mining	Rest of County	220	650
Office/Government	Rest of County	170	550
Retail/Services	Rest of County	930	2100
<b>Catt. Co. - Total Jobs from Local Development</b>		<b>3920</b>	<b>9450</b>

[1] Includes both potential jobs from local development opportunities (See Table F.4-3) and secondary job impacts based on "multiplier" effects (See Table F.4-4).

Table F.4-6 compares these employment impacts to base forecasts for the Null Alternative and existing employment figures. Under the Null Alternative, employment in Cattaraugus County would grow at an annual rate of approximately 0.25%. The Upgrade Alternative would increase this annual growth rate to 0.50%, and Freeway Alternative would increase it to 0.81%. The Town of Concord would grow at a somewhat higher rate, one half to one percent higher than Cattaraugus County.

**Table F.4-6  
Potential Employment Levels & Growth (1995-2025)**

	Southern Erie County (Concord)	Cattaraugus County
<b>1990 Employment</b>	4,059	40,021
<b>Base Forecast - 2025 Null Alternative</b>	5,500	43,660
<b>Annual Growth Rate '90-25</b>	0.87%	0.25%
<b>Upgrade Alternative</b>		
Local & Secondary Job Impact	1,080	3,920
<b>Total Employment</b>	6,580	47,580
<b>Annual Growth Rate '90-25</b>	1.39%	0.50%
<b>Freeway Alternative</b>		
Local & Secondary Job Impact	2,160	9,450
<b>Total Employment</b>	7,660	53,110
<b>Annual Growth Rate '90-25</b>	1.83%	0.81%

## **APPENDIX E**

Cattaraugus County Framework for Community Consensus,  
"Vision for Cattaraugus County"

## Appendix Two

# Vision for Cattaraugus County

Cattaraugus County has one overarching goal and vision. It is to achieve a balance between rural and urban development trends. This balance is needed in order to protect Cattaraugus County for future generations:

- As a place where people want to live, work, raise their children, retire and invest their earnings and futures.
- As a community of diverse interests and attractions during the four seasons of the year, with a clean environment, creating a sense of excitement and a sense of place and identity.
- As an attractive business setting, drawing people and commerce from a multi-state area and from the global economy, thereby bringing new income into Cattaraugus County and creating jobs, business opportunities, and hope for the future.
- As an attractive community of mixed land uses, rural and urban, productively deployed and working cooperatively (rather than in constant conflict) for the benefit of residents, property owners, business interests, visitors, and the local tax base.

This vision is wholesome, healthy, and robust with opportunities. It portrays a rural community that is blessed not only with great natural endowments, but also by wise decision making and planning. It satisfies diverse interests within Cattaraugus County. It is not easy to give one interest special treatment without affecting or even hurting other interests. A balance is needed.

This vision would encourage new development, but in controlled directions and densities. Growth would continue, but with principles and guidelines. Locations would be selected based on density limits established in carefully designed plans, negotiations, and zoning ordinances.

Of particular interest to a balanced growth policy are techniques that cluster land uses together, preserve open space, exert controls over highway frontage development, separate incompatible uses from each other, pre-

vent environmental problems, coordinate locations, design better subdivisions, create trail systems, and spread costs over time as well as over a broader base of taxpayers.

Low density residential, commercial, agricultural and recreational uses would be encouraged among the valleys, farms, woodlands, and hillsides. Higher density developments would be encouraged to locate closer to existing villages and urban services, and in the vicinity of major intersections. This would reduce the cost of improvements to roads and for extending water and sewer systems. It would protect the rural areas and open spaces of Cattaraugus County, including its farmland, scenic mountains, valleys, woodlands, and its land, air and water for future generations.

This framework is the basis for implementing the following goal from the Cattaraugus County Planning Board's report, *Pathway to the Future – Planning for the 21st Century* (February 26, 1992):

“The overriding effort to achieve economic development, if done without a comprehensive concept of development and without disciplined land use planning, can destroy the quality of life and character of a rural community.

“On the other hand, without economic development, a community may suffer the ill effects of unemployment, decline and blight.

“A balance is therefore needed, Cattaraugus County is not looking for decline, nor is it seeking unbridled development that destroys an established way of life along with the environment. It is seeking instead a planned and well-balanced growth throughout the County”.

This vision is for the 21st Century.

Approved on April 26, 2001 by the Cattaraugus County Planning Board. This vision is based on “The 1990s – A Time for New Directions,” by Terry H. Martin, Ph.D., Cattaraugus County Local Land Use and Infrastructure Study, Appendix E, (The Saratoga Associates, March 1996).

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