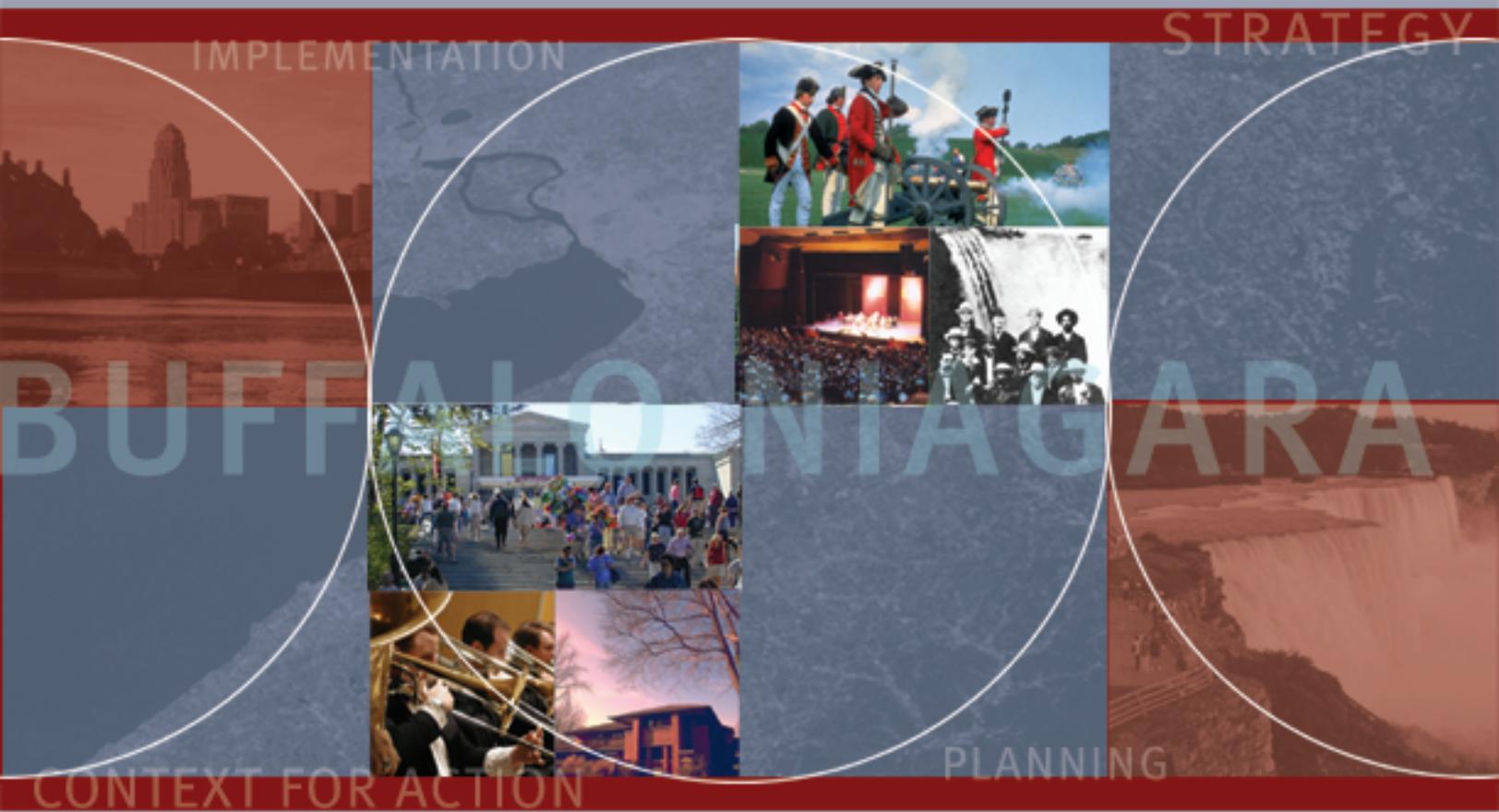


A CULTURAL TOURISM STRATEGY:

Enriching Culture and Building Tourism in Buffalo Niagara



A Report from the
Buffalo Niagara Cultural Tourism Initiative

January 2005



ACKNOWLEDGEMENTS

BUFFALO NIAGARA CULTURAL TOURISM INITIATIVE

The production of this strategic blueprint has relied upon the tireless efforts of more than 200 representatives of the cultural, arts, heritage, tourism, education, government, business and philanthropy communities over the span of two years. Indeed, the premise of this effort has been that the strategy will be a practical success only if those who are to be responsible for its implementation – those on the front lines of cultural tourism – are involved in its creation.

Participants in the planning process volunteered countless hours to attend meetings, participate in discussions and contribute valuable insight on the development of a strategic blueprint for cultural tourism development in Buffalo Niagara. Over an intense, two-year planning process stakeholders identified core issues, set goals and priorities and critiqued the report's major concepts and critical details. Members of the initiative's volunteer Steering Committee, co-chaired by Donald K. Boswell, President and CEO of WNED, and William L. McHugh, formerly Executive Vice President of Independent Health, attended these as well as regular committee meetings, providing vision and guidance to keep the effort on track and ensure the production of a practical report.

The region is indebted to The John R. Oishei Foundation, Erie County, The Margaret L. Wendt Foundation and Independent Health, whose financial support made possible the Buffalo Niagara Cultural Tourism Initiative and its resulting report. Their continued dedication to the region's cultural, arts and heritage organizations and the development of cultural tourism has been, and will continue to be, essential to attaining the vision of *A Cultural Tourism Strategy*.

It is important to note that this strategy attempts to reconcile diverse and even diametrically opposed viewpoints. These same viewpoints fostered a rich and vibrant discourse. Indeed, this report is stronger because of the broad participation and engagement of Buffalo Niagara's cultural tourism stakeholders.

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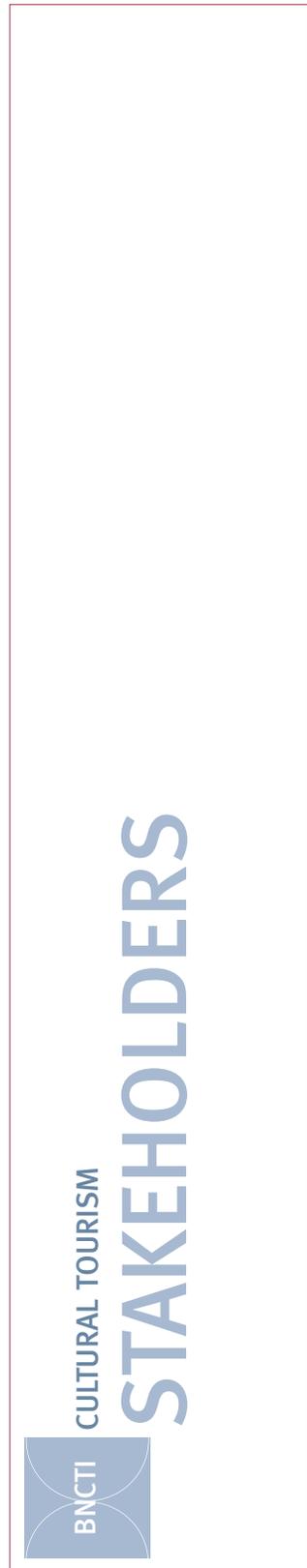
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**Please note, affiliations listed are as indicated at the start of the planning process.

First, special appreciation is extended to the chairpersons of the initiative's three Work Groups for their time, research and efforts in facilitating engaging discussions throughout the planning process: **Ted Pietrzak** (Marketing), **Glendora Johnson-Cooper** (Capacity Building) and **Robert Blanchard** (Implementation). Special thanks is also extended to members of a small working group that worked over several months to develop a practical structure for implementing the strategy based on stakeholder recommendations: **David E. Chesebrough** (Buffalo Museum of Science), **Paul Hogan** (The John R. Oishei Foundation), **Ted Pietrzak** (Burchfield-Penney Arts Center), **Susan Pryzbyl** (Kenan Center), **Lewis Rich, Jr.** (Rich Results, Inc.) and **Susan Scholterer** (Buffalo Niagara Convention & Visitors Bureau).

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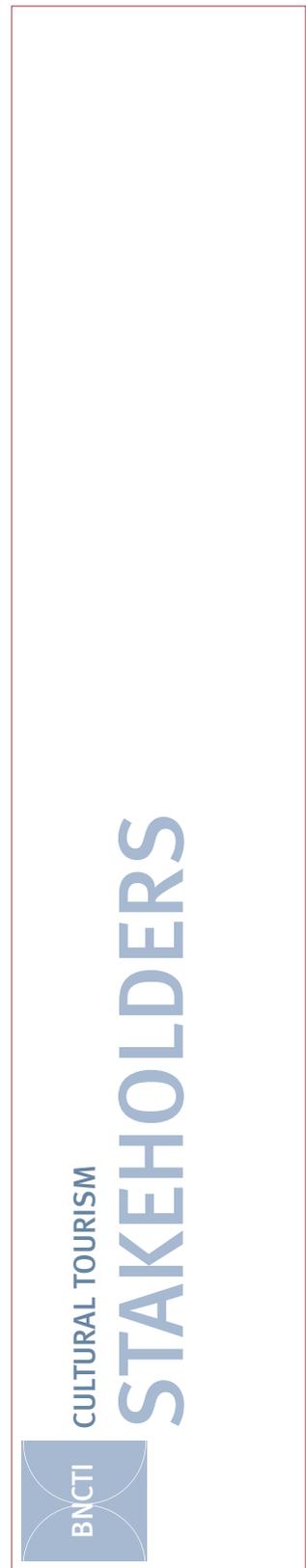




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*A Cultural Tourism Strategy:
Enriching Culture and
Building Tourism in
Buffalo Niagara...*

This strategy is a result of Phase II of the Buffalo Niagara Cultural Tourism Initiative, a participatory planning process engaging the region's cultural tourism stakeholders. This report is intended to serve as a blueprint for cultural tourism development in Erie and Niagara Counties in the context of the broader, binational Buffalo Niagara region.

The initiative has been led by a volunteer Steering Committee. The Institute for Local Governance and Regional Growth of the University at Buffalo has served as Project Manager.

The Buffalo Niagara Cultural Tourism Initiative began in 2002 with publication of a Phase I report, *Cultural Tourism in the Buffalo-Niagara Region: Developing a Comprehensive Plan*, funded by The John R. Oishei Foundation. The second phase has been funded by the Oishei Foundation, Erie County, The Margaret L. Wendt Foundation and Independent Health.

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- Old Fort Niagara
- Artpark Theatre
- Michigan Street Preservation Corporation (Michigan Street Baptist Church)
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- Downtown Buffalo Waterfront



I. EXECUTIVE SUMMARY

The Buffalo Niagara region is envisioned as a world-class tourism destination, in significant measure because of its extraordinary artistic, cultural and heritage attractions which will become better known, more widely admired and more frequently visited.

CONTEXT FOR ACTION

Opportunity: Robust regional development. The region can expand the cultural tourism market by giving strength and stability to arts, cultural and heritage organizations, by expanding opportunities for creativity and interpretation, and by growing the regional economy. In so doing the region will enhance the quality of life for its residents, improve its image and identity in the world at large, and make the region more attractive to investments of all kinds.

Challenge: Severe gaps in the cultural tourism system. High quality cultural attractions and the draw of a premier brand-name attraction in Niagara Falls give this region the potential to capture a growing market of travelers interested in cultural experiences. But while many are hard at work promoting tourism or sustaining culture, no one is in charge of cultural tourism, leaving significant gaps in the effort to develop and promote it.

STRATEGY

Coordinated Programming: Leveraging our best assets. A *Cultural Tourism Strategy* proposes the creation of coordinated programming around "centerpiece" attractions likely to draw national and international attention. In an annual or multi-year phased program, centerpiece attractions are to be connected to "experience clusters" that include venues and events related to the centerpiece as well as other tourism experiences and services (e.g., sporting events, hotels and restaurants). In any given cycle of this phased program, centerpieces could include Frank Lloyd Wright's Darwin D. Martin House, Old Fort Niagara, the Erie Canal, the Albright-Knox Art Gallery, the history of the Underground Railroad and others.

Targeted Marketing: Leading with research. These coordinated programs are to be promoted through research-informed publicity and marketing campaigns directed to targeted

audiences. These strategies ultimately will attract greater visitation, reach new markets and provide growing yields through improved data collection and analysis, information sharing, message coordination and performance-based monitoring.

Systemic Improvement: Filling the gaps. Behind this phased and focused development of the Buffalo Niagara brand of experiences will be a comprehensive effort to fill critical gaps in the support structure, from the perspective of both the entire cultural tourism system and its individual organizations. For instance, we can better reach targeted markets with improved data collection and analysis and performance-based monitoring. Training can assist organizations with management, strategic capital investments and improving their visitor readiness. Better coordinated transportation and signage can help visitors reach their destinations. Technology applications can improve organizational efficiency and visibility. Such infrastructure improvements, planned according to programming cycles, will build upon one another to strengthen the entire system.

IMPLEMENTATION

Organizing for Implementation: Performance-based leadership and collaboration. According to the stakeholders' vision, implementation will require active leadership by professionals whose only job is to develop cultural tourism. New resources must be committed to create additional capacity. The implementation structure must possess the necessary skills and experience, understand the situation and strategy, engage all relevant stakeholders in both Erie and Niagara Counties, and organize the necessary collaborations.

In accordance with these principles, it is recommended that a bilateral structure be formed around the two main components of a cultural tourism system – **marketing** and **asset development**. The infrastructure needs of each also will be an important focus of this structure. Implementation will be monitored by a **Cultural**

Tenets of A Cultural Tourism Strategy

The cultural tourism mission

- Strengthen cultural, artistic and heritage organizations;
- Expand individual opportunities for creativity and interpretation;
- Help our regional economy grow;
- Enhance the quality of life in our communities;
- Advance the image and identity of the region; and
- Build the region's reputation as a world-class tourism destination

These benefits reinforce one another and can be achieved together.

Tenets of A Cultural Tourism Strategy

Tourism, cultural and otherwise

Cultural tourism and the broader tourism market of which it is a subset are inextricably intertwined. Culturally motivated visitors depend on much the same infrastructure as all other visitors. Even those whose primary purpose of travel is not culture may choose to enjoy the same attractions that draw cultural tourists. The two markets overlap.

At the same time, cultural tourists remain a distinct group whose motivations, expectations and needs are different than those of tourists in general. Getting them here will require targeted promotional strategies. Getting them to come back will require providing a unique experience.

Tenets of A Cultural Tourism Strategy

Potential audiences include both visitors and residents

This strategy makes no false choices between attracting visitors to area cultural venues and increasing audiences in general. Tickets sold to visitors from California, New York City or Rochester bring no more revenue to arts venues than do tickets sold to visitors from East Aurora, Kenmore or South Buffalo.

At the same time, it is understood that patronage by visitors from beyond the region translates into additional revenue for the hotel, restaurant and transportation industries, among others. Visitor dollars also represent a kind of “export” income that expands the local economy.



Tourism Oversight and Advisory Council (Advisory Council), composed of board- and leadership-level representatives from cultural, arts and tourism organizations, as well as government and funding entities from Erie and Niagara Counties. The Advisory Council will provide policy perspective and coordinate resources for implementation of *A Cultural Tourism Strategy*. The Advisory Council will also work directly with a **Cultural Tourism Working Group** (Working Group), to consist of professional staff from cultural, arts and tourism organizations, and to focus on day-to-day implementation of all aspects of the strategy.

With existing staff at the region’s two main tourism promotion groups already focusing on cultural tourism marketing, a new position will be created to serve the area of asset development. A **Regional Asset Development Coordinator** will be charged solely with the task of building the capacity of arts and cultural groups by assisting with organizational assessment, providing resources and materials, and engaging appropriate training and consultation

In broader terms, the Advisory Council and Working Group will oversee a governance structure for cultural tourism that establishes a forum for communication, coordination, collaboration and long-term planning involving the entire range of relevant parties.

Summary of Recommendations: From strategy



- 1 Cave of the Winds, Niagara Falls
© Niagara County Department of Planning, Development & Tourism
- 2 Louis Sullivan's Guaranty Building, Buffalo, NY

to action. It is recommended that the Advisory Council and Working Group immediately begin coordinating development of the first programming cycle – in terms of asset development, marketing and infrastructure improvements – by collaborating with the region's

tourism, arts, culture, heritage, economic development and marketing organizations. Other organizations whose missions are not directly related to cultural tourism must also be partners.

In its implementation of the strategy and each cycle of coordinated programming and marketing, the Advisory Council and Working Group are to maintain the perspective of the entire cultural tourism system.

Funding: Sustaining cultural tourism development. It is anticipated that an approximately \$210,000 annual budget will be required to fund the new asset development coordinator, consultation and training services related to marketing and asset development, support staff and operating expenses. Indeed, success for *A Cultural Tourism Strategy* must depend, in large measure, on a predictable and adequate source of funding over the long-term. It is important to note that this budget does not include funds for major promotional campaigns or capital investments. Financial support for this strategy should come from both existing sources and new and previously untapped sources. Funding sources should include a combination of public, private and foundation sources, as well as some degree of earned income from involved organizations.

MOVING FORWARD

Those who created *A Cultural Tourism Strategy* believe that if the process does not lead directly to effective implementation and achievement, it will not have been worth the effort. The strategy was crafted to make that possible, but one further ingredient is required: courage.

We must have the courage to go beyond old habits and organizational boundaries to engage a new and creative process of collaboration. We must also have the courage to act on our conviction that investing in cultural tourism can bring significant returns. The potential for cultural tourism is enormous. We have already begun working together to make that potential real, but this work must continue.

II. INTRODUCTION

The Buffalo Niagara Cultural Tourism Initiative was initiated by cultural organizations not only concerned about their own future in the context of the struggling regional economy, but also confident in cultural tourism’s potential to strengthen their organization and improve Buffalo Niagara’s economy and quality of life. Their goal has been to craft an effective and enduring strategy and a practical blueprint for implementation. Through collaboration, this strategic effort seeks to build the cultural tourism market while respecting the diverse needs, resources and artistic visions of our many cultural institutions.

A precursor to the project – the Phase I report¹ of the Buffalo Niagara Cultural Tourism Initiative – inventoried the region’s past planning initiatives for the development of cultural tourism, listing nearly five dozen individual plans and reports and describing a range of proposals, from one-time events to comprehensive regional initiatives. The breadth and depth of this work highlighted the widely shared understanding that cultural tourism is a major opportunity for regional development, but concluded there is a need for a more coordinated effort.

Indeed, the Buffalo Niagara Cultural Tourism Initiative has intended to build on the region’s persistent efforts to improve venues, develop new programming, promote the region and draw new visitors. These efforts have included Art on Wheels, One Summerlong Sensation, Doors Open Niagara, the Binational Tourism Alliance, the Pan American Centennial Celebration, Masterworks from The Philips Collection, The Summer of Monet, and many more going back as far as exhibit selections from the William S. Paley Collection at the Albright-Knox Art Gallery in 1995 and the World University Games in 1993.

Evaluations of these events have varied. Not all were financial successes. But much that is good remains: battle-tested relationships, a history of collaboration, growing capacity and a continuing commitment in this community to develop and promote cultural tourism. In the same way, the success of annual galas and special events like Curtain Up!, the Buffalo Niagara Guitar Festival, the Allentown Art Festival, the Canal Fest of the Tonawandas, the

Roycroft Summer Festival, and the Taste of Buffalo is built upon a foundation of collaborative relationships.

The current phase of this strategic initiative (Phase II) involved a conscious and concerted effort to embrace the perspectives of the diverse cultural institutions in our region and to involve other stakeholders in the tourism, government, education and philanthropy sectors. Also, a special effort was made to reach out to a circle of small and ethnically diverse cultural institutions to ensure the strategy would understand and benefit from the particular perspectives and needs of all our unique institutions. Indeed, the initiative’s organizers understood that a successful tourism plan must be based on the participation of those required to implement its recommendations.

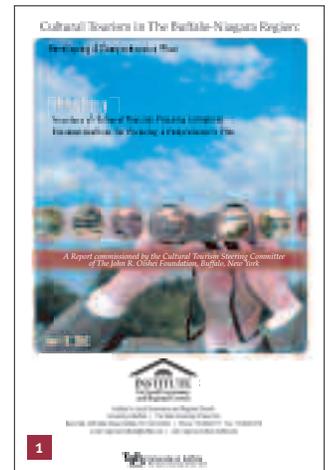
More than two hundred different stakeholders from these communities were engaged in the planning process, defining the issues, setting the goals and priorities, and providing critiques of the emerging proposals and recommendations.

The process also benefited from the continuing work of a volunteer Steering Committee of key community and business leaders who pushed persistently for a practical, effective and do-able plan.

The strategic plan and implementation structure represent a flexible, dynamic approach to communitywide collaboration for cultural tourism development. They are structured to respond to the opportunities and challenges of new circumstances.



The geographic scope of the strategy is specifically Erie and Niagara counties, but within the context of the broader binational region.



1



2 BNCTI Phase 1 Report
2 BNCTI Project Website

¹ “Cultural Tourism in the Buffalo-Niagara Region: Developing a Comprehensive Plan.” Institute for Local Governance and Regional Growth, April 2002

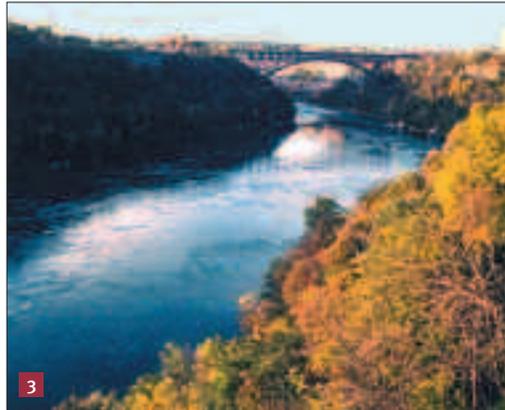
III. CONTEXT FOR ACTION

a. Vision

The Buffalo Niagara region is envisioned as a world-class tourism destination that consistently becomes better known, more widely admired and more frequently visited. This vision is indeed attainable based on the region's abundant and extraordinary artistic, cultural, heritage and tourism attractions, among them Niagara Falls. Moreover, behind these assets is a dedicated group of cultural stewards and tourism experts. National trends are also in its favor, as cultural tourism is one of the fastest growing dimensions of tourism in the U.S. and beyond.



1 Shea's Performing Arts Center
© Buffalo Niagara Convention & Visitors Bureau
2 Buffalo & Erie County Historical Society
© Buffalo Niagara Convention & Visitors Bureau



3 The Niagara River Gorge
© Buffalo Niagara Convention & Visitors Bureau

The exact economic impact of cultural tourism in general and specifically within Buffalo Niagara can be difficult to assess. The cultural tourism audience is diverse and includes group tourists, independent travelers, conventioners, business travelers, residents and visiting friends and family. Critical marketing and economic data on these visitors – including their places of origin, primary reasons for visiting the region and spending patterns – are collected only sporadically, yet need to be addressed routinely and on a regional basis to have any real value in deciphering important trends.

b. Opportunity: Robust regional development

Achieving the vision of *A Cultural Tourism Strategy* will generate economic benefits for the region, at the same time enriching its cultural assets and institutions and building the tourism economy. Tourism can help support Buffalo Niagara's arts institutions and develop our cultural heritage. It will also fill hotels, restaurants and shopping districts, and keep our airport busy. The regional economic "pie" grows when more people visit the region or choose to stay longer to enjoy cultural attractions. Of course, the potential benefits of cultural tourism go far beyond economics. Investments in cultural tourism help to build our collective self-image and transform Buffalo Niagara's identity to the world. Cultural tourism and the things we must do to develop it improve our shared quality of life and expand opportunities for creative expression.

Certainly the region should not underestimate the importance of this market simply because our measures of it are lacking. In fact, a fundamental theme of this report is that the region should pursue a much more deliberate and comprehensive approach to data collection, economic impact assessment and performance measurement which quantitatively monitors the value of cultural tourism to Buffalo Niagara.

Preliminary research in the region has shed some light on the quantifiable benefits accruing to the region from cultural tourism. An analysis of One Summerlong Sensation, a cluster of cultural tourism events in Buffalo Niagara during summer 2003, revealed that spending by more than 700,000 visitors to 17 sample cultural, arts and tourism venues, as well as expenditures by the organizations themselves, leveraged a \$75 million economic impact upon the region.² Approximately one-third of these

Assessing the Value of Cultural Tourism in Buffalo Niagara

We need better numbers

A primary conclusion of *A Cultural Tourism Strategy* is that the region's cultural tourism system is impaired by a lack of data. Indeed, without the ability to quantifiably assess the current picture and the potential of cultural tourism, progress is difficult. Regional tourism promotion agencies gather data on tourism in general; some individual venues collect data on their visitors. These efforts are, however, incomplete.

A coordinated and region-wide system for gathering, analyzing and sharing cultural tourism data should include information on visitors, visitor attitudes, spending, venues attended and economic impact, among other variables.

² "One Summerlong Sensation – Economic Impact Assessment," Institute for Local Governance and Regional Growth (A Report Commissioned by the Buffalo Niagara Convention & Visitors Bureau), February 2004.

visitors were tourists, or visitors from outside a 50-mile radius of the region. The study showed the average length of stay in the Buffalo area to be about 2.2 nights, with more than half of those surveyed planning to stay at least one night in a hotel, motel or bed and breakfast, and 24 percent planning to stay with family and friends. Another study found that Shea's Performing Arts Center leverages a \$40 million annual economic impact upon the region. The Frank Lloyd Wright-designed Darwin D. Martin House, upon completion of renovations, is expected to generate a \$20 million annual economic impact.

The premise of *A Cultural Tourism Strategy*, however, is that there is room for growth. Cultural tourism is an increasingly important segment of the national tourism market which produces a \$500 billion economic impact every year.³ And tourism is already one of the largest industries in New York State, with domestic travelers spending more than \$26 billion annually.⁴ In 2003 New York City was the most popular tourism destination for overseas travelers, according to another study.⁵ Moreover, a 2003 Travel Industry Association of America study⁶ found:

- More than 20 percent of all trips taken by U.S. travelers in 2002-2003 included historical or cultural activities;
- Travelers on a historic/cultural trip tend to spend more (\$623 vs. \$457, excluding

transportation) than those on the average trip; they also travel almost two nights longer (5.2 nights vs. 3.4 nights).

- In relation to the average U.S. trip, historic/cultural trips more often are seven nights or longer, and include air travel, a rental car and a hotel stay;
- Such historic/cultural travelers tend to extend their stay to experience history and culture at their destination, with four in ten adding extra time to their trip for this reason.

The binational Buffalo Niagara region already attracts about 16 million visitors each year, largely to see Niagara Falls. The economic impact of just a small percentage of those visitors staying an extra day to visit a museum, historical attraction or festival is potentially staggering, not only for the arts and cultural organizations themselves, but also for the tourism and hospitality industries and the entire Buffalo Niagara economy.

Cultural, arts and heritage assets also play an indirect but critically valuable role in the broader economic development strategy of the region. For instance, convention decisions often hinge upon the quality of life and cultural tourism amenities offered by a region. Moreover, people making location-based investments – where to establish or expand a business, relocate for employment, raise a family, vacation or retire – favorably regard regions offering opportunities for cultural enrichment. The arts and culture community in Buffalo Niagara should be recognized as part of the region's basic infrastructure for sustainable economic development and should be invested in accordingly.

Clearly the reasons to develop cultural tourism go beyond ticket and retail sales at cultural venues, hotels, restaurants and elsewhere. The region's extraordinary galleries, museums, theaters and historic sites remain important in and of themselves. They enliven community character, contribute to regional quality of life and signal that the community values excellence and intelligent discourse. It is crucial that we pursue strategies that can expand the



³ Travel Industry Association of America. "Economic Research: Economic Impact of Travel and Tourism," (2002). Retrieved November 15, 2004, from www.tia.org/Travel/EconImpact.asp

⁴ Travel Industry Association of America. "California, Florida and Texas Rank Among Top States in Spending by Domestic Travelers," (2003). Retrieved November 14, 2004, from www.tia.org/Press/pressrec.asp?Item=309

⁵ Travel Business Roundtable. "About the Travel Business Roundtable - Travel and Tourism Data," (2003). Retrieved November 14, 2004, from www.tbr.org/about/faqs.htm.

⁶ Travel Industry Association of America. "Travelers' Desire to Experience History and Culture Stronger than Ever" (2003). Retrieved November 14, 2004, www.tia.org/Press/pressrec.asp?Item=284.

opportunities for artistic expression, historical understanding and reflective experience.

Supporting cultural tourism, then, is critical in light of both the potential economic benefits and the chronic financial stress experienced by the region's cultural, arts and heritage institutions and the broader regional economy. Thus far it has made intuitive sense to our elected officials, investors, businesses and residents to invest in cultural tourism in Buffalo Niagara. But with fewer dollars to offer, it is critical that the region confirm and specify what intuition tells us, and facilitate a more coordinated, targeted investment in cultural tourism. To this end, the region should foster a systematic, ongoing and cooperative process of gathering, analyzing and sharing data on cultural tourism and tourism in general in Buffalo Niagara.

c. Challenge: Severe gaps in the cultural tourism system

Although Buffalo Niagara is home to excellent institutions whose work is essential to the success of *A Cultural Tourism Strategy*, including arts councils, foundations, visitor bureaus, universities, local governments and, of course, the arts and cultural organizations themselves, two critical problems seriously impair the capability of the region to take maximum advantage of its rich and diverse array of cultural and heritage resources:

- As outlined in the Phase I report of the Buffalo Niagara Cultural Tourism Initiative, past and current initiatives in the region remain fractured and inefficient. Although there have been many good people working on many good efforts, the effectiveness of those efforts has been limited due to a lack of an overall regional vision and strategy for cultural tourism.
- The current system leaves many serious gaps that need to be filled if the region is to achieve its potential in cultural tourism and, in turn, strengthen cultural organizations, expand opportunities for individual artists, grow the regional economy, enhance its quality of life and improve its image and identity.

A primary motivation of *A Cultural Tourism Strategy* is to respond to these two problems.

The following are examples of current gaps in critical cultural tourism functions that limit the ability of the region and individual organizations to move forward:

Long-term planning for cultural tourism. In recent years the region's cultural, arts and tourism organizations have worked together to take advantage of high-profile exhibits, events and special programs by developing better marketing strategies and more varied tourism packages. Because Buffalo Niagara lacks a long-term vision for cultural tourism, however, these efforts have been disjointed, often producing only short-term benefits. They have failed to effectively build on one another to move the region forward.

Cultural tourism infrastructure. Making sure the region's cultural and arts facilities are "visitor-ready" is vital, but so is creating and maintaining the infrastructure that connects venues and delivers visitors to the doorsteps of the region's attractions. Many entities are involved, but it is the job of no one, at least from the perspective of cultural tourism, to pay attention to signage for motorists and pedestrians, the development and integration of bus, rail, airport shuttle and taxicab service, information systems or the maintenance of the visitor environment in general. Another potential dimension of tourism infrastructure is a significantly larger, more active Visitors



1 Buffalo Niagara International Airport
2 Niagara Gorge Trails Wayfinding System
3 Rainbow Bridge, Niagara Falls

Center in the region, which could potentially house traditional public outreach functions as well as many of the current or recommended functions for cultural tourism coordination and "back office" services.

Education and training. The region has a strong education infrastructure with many higher education and other types of institutions offering degrees, certificates and training in tourism and related areas. These resources are sufficient to prepare people for the full range of roles in cultural tourism, including front-line hotel staff and tollbooth attendants, managerial personnel in hotels and restaurants, and board members of arts and tourism organizations. However, the region is lacking in its capacity to plan, coordinate and deliver these programs to effectively meet emerging system needs. We need to convene the partnerships required to accomplish this task.

Research. A number of organizations collect their own data, but no system exists to gather, analyze or share information on a regional basis. The region needs to cooperate in the collection and sharing of data on visitor demographics, spending patterns, lifestyle clues, travel behavior, qualitative visitor feedback and best practices.

Identifying best practices. The region has much to learn from other regions about effective strategies for developing cultural tourism. The region also can learn from its own experience in tourism and other sectors, although these lessons need to be effectively shared and communicated. Researching and applying best practices is an essential – and largely unattended – task in building the cultural tourism system.

Technology application. Technology has become indispensable to the tourism industry for the exchange and evaluation of information. Centralized technological applications, including a cultural tourism website, organizational websites, databases, surveying tools and even ticketing programs, can help the region's individual organizations and the entire cultural tourism system to more efficiently communicate with potential markets, serve audiences, conduct research and evaluate performance.

Shared services. There are many opportunities for streamlining administrative functions now managed separately for each cultural or tourism organization in the region. Such functions include program information, ticketing, employee health insurance, education and training, marketing and data collection. Better coordination of these tasks has the potential to save money and time for many of the region's organizations, and to vastly improve the overall efficiency of the cultural tourism system.

Evaluation and assessment. Largely as a result of the region's fragmented data collection efforts, Buffalo Niagara lacks a system of evaluation and assessment for its cultural tourism programs and organizations and the tourism industry in general. It is essential for the region to develop a centralized process for assessing organizational performance, setting benchmarks and standards for accountability, and measuring the economic impact of cooperative tourism development efforts.

Sustaining collaboration. Making *A Cultural Tourism Strategy* work will require ongoing collaboration to deliver packaging, coordinated marketing and capital investments in venues and infrastructure. The region has built a legacy of partnerships through programs such as Summer of Monet and One Summerlong Sensation, but there needs to be a process that ensures the region is always "connecting the dots" – coordinating programs, events and initiatives, building trust and partnerships across jurisdictional and organizational boundaries, forging strategic collaborations and building on the base of knowledge and experience that these create.

Governance. The region counts among its assets a strong base of organizations including the cultural venues themselves, tourism promotion agencies, government entities, foundations, arts councils and universities. However, not one organization or staff member has as its mission the coordination of the entire cultural tourism system, including bridging the gaps in the services integral to that system. The region needs a centralized governance structure to carry out these functions and coordinate new and existing resources.

a. Stakeholder views: Issues and goals

In lively working sessions over many months in 2003 community leaders in the cultural, arts, heritage and tourism sectors took part in the Buffalo Niagara Cultural Tourism Initiative planning process. They pointed out critical issues, set goals and priorities, identified major obstacles to overcome and offered their critique of the emerging plan's concepts and important details. Despite differing perspectives, all agreed that doing nothing is not an option.

To consider the region's chief obstacles and opportunities for cultural tourism development, participants were initially divided into three Work Groups, each focusing on a major theme:

- **Capacity building:** Enhancing the visitor experience by addressing requirements for capital and operating support, improving staff and board skills, developing more appealing exhibits and public programs, organizing education and training for tourism workers.
- **Targeted Marketing:** Developing better ways to attract larger audiences, reach new markets and provide growing yields through improved research, data analysis, information sharing, message coordination and performance-based monitoring.
- **Implementation:** Designing and creating the mechanisms to organize action, continue planning, secure sustainable resources, build visitor infrastructure and facilitate a systemic approach to cultural tourism development.

In an intentionally fast-paced but disciplined process, planners brought the three Work Groups back together again to develop a rich and detailed description of overarching issues and goals, examine cultural tourism practices in other regions, and consider preliminary concepts for *A Cultural Tourism Strategy*.

Participants first characterized cultural tourism as a system that includes not only arts and cultural venues – the "product" – but also those charged with marketing the product, providing hospitality, creating and maintaining essential visitor infrastructure and financially

supporting the system. Everyone agreed it is crucial to focus on the needs of the customer and the development of a visitor- and audience-centered strategy.

Stakeholders also identified a range of challenges. For instance, while some institutions enjoy financial support and technical assistance for marketing and business planning, many require substantial investments before they can be classified as visitor-ready. On the other hand, some organizations are already planning ambitious fundraising capital and endowment campaigns. The system requires significant investment in its support structure, which includes education and training, information systems, directional signage and transportation. At the same time, most of the region's cultural, arts, heritage and tourism organizations have come to rely upon a few funders that have grown weary seeing their resources stretched too thin as they attempt to provide some assistance to all.

Ultimately, participants honed these dozens of issues for cultural tourism into six interrelated goals for change:

- Create a system to foster continuous improvement by cultural institutions in terms of the number of visitors, financial sustainability, artistic quality, visitor-readiness, contribution to regional quality of life and support for economic development.
- Build partnerships that systemically work to improve cultural experiences in the region in terms of quality, authenticity and responsiveness to audiences. Also, base collaboration upon practical analysis of potential mutual benefits, organizational costs and strategic overlap of interests for all participants.
- Secure predictable and equitable funding and management resources for implementation; develop effective investment and reinvestment strategies for such resources.



BNCTI Planning Session

- Convey the economic and quality-of-life benefits of Buffalo Niagara's cultural institutions and its cultural tourism industry to residents, funders, elected officials, state and federal organizations and other audiences.
- Tap cultural tourism as a means to enhance Buffalo Niagara's image locally, regionally, nationally and globally, and leverage it as a resource for further growth.

Toward those ends, participants suggested a set of starting principles for an effective and efficient approach to achieving those goals:

- **Build on strengths.** It makes sense to put Buffalo Niagara's best foot forward – leading with the region's architectural gems, theaters, galleries and natural history and heritage resources. There also needs to be a vehicle for helping less mature venues evolve and improve.
- **Balance inclusivity and pragmatism.** The strategy should respect the region's diverse institutions and ensure none is inadvertently excluded. Yet the benefits of inclusion should always exceed the costs; the process should respect that some organizations may prefer to go their own way.
- **Develop organizational and systemic capacity.** To be truly sustainable, work supporting the strategy should always strengthen the organizations as it builds the larger system of cultural tourism.

- **Tap organizations with know-how.** Buffalo Niagara's cultural institutions possess important expertise. Ongoing work should draw upon this to improve outcomes and save time and money.
- **Enjoy market support and reflect real consumer behavior.** Rather than pursue speculative markets, the initiative should target proven or likely visitor populations. Similarly, the strategy should reflect that most visitors seek both cultural and other experiences.
- **Link cultural resources without compelling compliance within a thematic structure.** Collaboration generates benefits for both participants and the system, but not when it is forced or fails to do good for contributors. A *Cultural Tourism Strategy* should allow the system to deliver benefits regardless of whether organizations take on leadership roles.

Stakeholders endorsing these principles made their position clear: to undertake a serious effort to improve how the cultural community functions and influences economic development, we must build on strengths to maximize efficiency and implement an effective strategy. In short, this initiative should find the best way to foster an environment where arts and culture flourish and contribute to regional development, economic and otherwise.

b. Precedents: What other places are doing

Throughout the planning process, from the identification of challenges and issues facing the region to the development of specific strategies, *A Cultural Tourism Strategy* was informed by research on best practices from Philadelphia, St. Louis, Indianapolis, Pittsburgh, Chicago, Boston and Cleveland, among other U.S. cities.

Although these experiences elsewhere are informative, there is no one model for a governance structure, marketing strategy or cultural tourism program that can be adopted here in its entirety. There is also much to learn from the region's own experiences – positive and otherwise. The region must attempt to synthesize its past experiences with the lessons it has learned from other U.S. metropolitan regions to create a solution that fits Buffalo Niagara.

Several stories from Philadelphia, Denver and Washington are included in this section as sidebars. What follows is a summary of the emerging "state of the art" in cultural tourism in terms of the approach and scope of such efforts, market research, brand management, packaging and programming, convention marketing, infrastructure improvements, product development, technology, funding and governance:

The **approach and scope** of cultural tourism development efforts has changed as the market

and an understanding of its value has changed. Recognizing that the economic impact of tourism goes far beyond "heads on beds," many agencies are taking a more integrated approach. This means going beyond group sales to appeal to independent travelers; packaging shorter visits for affluent but time-starved tourists; appealing to women as travel decision makers; moving beyond advertising as the sole marketing tool; and most of all, appreciating that cities and the cultural and heritage attractions they hold are increasingly popular destinations for more sophisticated travelers.

Market research is becoming less crude as technology facilitates the collection and sharing of consumer information among attractions and tourism promotion agencies. Much like Amazon.com uses one's taste in purchased books to pitch other titles with appeal, more sophisticated tourism promotion agencies are collecting and mining data and using e-mail newsletters and other techniques to reach qualified consumers. For example, a repeat visitor to a music festival might also return for a wine event. Knowing the lifestyle characteristics of target markets allows promoters to place advertising dollars more accurately.

Brand is not a synonym for a slogan, a new name for a region or the product name of any attraction or collection thereof. A brand involves the totality of emotions and associations evoked by imagery associated with the region. It is a promise of a certain type of

Greater Philadelphia!

Historical, cultural and entertainment and leisure offerings across a five-county region are available to online visitors of www.gophila.com, due in large part to the Greater Philadelphia Tourism Marketing Corporation, which runs the centralized, integrated marketing program. Its work includes consumer research, data-mining, advertising and public relations. It also serves as a respected voice on regional infrastructure issues.

GPTMC has been funded by a one-percent addition to the hotel sales tax. The William Penn Foundation funds GPTMC to work with the region's cultural organizations on projects like the unique "Culture Files" space on the website.

Many of the region's museums and historic sites are much more visitor ready, thanks to the Pew Charitable Trust's Cultural Leadership Program, a grants and capacity building initiative. Pew's three-year grants to nonprofits support not only artistic accomplishments, but also operations and management improvements.

Once gritty Philadelphia is now "hot" in the eyes of the creative class. GPTMC is leading a media pitch to convert graduates of the region's prestigious universities into residents.

The Greater Philadelphia Tourism Marketing Corporation has shown that development and marketing of cultural institutions is a crucial element in tourism development and vice versa – a valuable lesson for the Buffalo Niagara Cultural Tourism Initiative.



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"Philadelphia and Its Countryside" is the name used by six visitor bureaus in three states working together as the Greater Philadelphia Tourism Marketing Corporation.

1 Liberty Bell

Photo by R. Kennedy © Greater Philadelphia Tourism Marketing Corporation

2 Philadelphia Trolley Works

Photo by Bob Krist © Greater Philadelphia Tourism Marketing Corporation

3 Valley Green

Photo by R. Kennedy © Greater Philadelphia Tourism Marketing Corporation

PHILADELPHIA

Washington, D.C.: Beyond the Monuments

Millions of people visit the nation's capital each year. Most head for the Smithsonian and the major monuments along the National Mall, missing out on the city's many other cultural jewels. That's changing, thanks to Cultural Tourism DC, "a non-profit coalition linking you to Washington's heritage and arts."

CTDC's staff works with 130 organizational members to take advantage of upcoming "big events" through themed or linked programming and cooperative marketing.

CTDC's \$1 million annual budget comes from its dues-paying members, government, small businesses, the downtown business improvement district and a dozen foundations. Support is also provided by arts organizations large (The John F. Kennedy Center for the Performing Arts) and small (GALA Hispanic Theater).

When the World War II Memorial opened in 2004, more than 60 of the city's museums and performance groups featured World War II-related exhibits and programming as a result of Cultural Tourism DC's collaboration with the Washington, D.C. Convention & Tourism Corporation, which focuses on convention center bookings.

The success of the CTDC model – a dedicated effort with secure funding to focus attention on cultural attractions within the larger tourism system – suggests a similar approach might work here.

experience delivered at a certain quality level. A brand is at the intersection between what consumers believe about the region and what you want them to believe. Volvo wants car buyers to think safety. For Charleston, SC, think historic southern charm. Each "firm" understands the essence of its brand, works consistently to manage it, builds a reality to support it and keeps it clear and consistent by taking charge of all communications that represent it. Even as advertising campaigns come and go, the brand persists.

Packaging has become pervasive as travelers with more money than time look for hassle-free travel decisions and help in making the best use of limited leisure opportunities. Packaging runs the gamut, from all-inclusive offerings to web-based, do-it-yourself packaging which allow travelers to choose from a menu of walking tours, museums, boat rides, zoos, restaurants, entertainment, transportation and accommodations. Pittsburgh's "Kidsburgh" package includes tickets to a half dozen attractions, including the zoo, children's museum and aviary and science centers. The "Andy Warhol's Pittsburgh" package includes tickets to the Warhol Museum and the Carnegie Museum of Art, a tour of Warhol's boyhood neighborhood and tickets for the nightlife trolley – the UltraViolet Loop. Both packages are available with or without hotel accommodations.

Special events may come and go, but many cities are highlighting permanent attractions by linking them to anniversaries or openings and offering them as packages. In Washington, D.C., Cultural Tourism DC organized "Blues & Dreams" around the 40th anniversary of the "I Have a Dream" speech by Martin Luther King, Jr., capitalizing on two major shows at the Smithsonian Institution – one on blues music, the other on Romare Bearden (see sidebar, "Washington, D.C., Beyond the Monuments"). From African American quilts at the Textile Museum to walking tours of Duke Ellington's neighborhoods, visitors easily found a wealth of African American experiences. In April 2004 the long-awaited World War II Memorial opened in Washington, D.C. A dozen or more cultural institutions offered exhibits, plays, musical performances and events focused on period themes. These included tours of Eleanor Roosevelt's Washington, swing band concerts and more.

Convention marketing has found an ally in cultural tourism, too. Because organizations increasingly depend upon conventions for revenue, they take care to choose sites that will appeal to members and produce heavy attendance. As cities compete, those that are known to be rich in cultural attractions have an edge. The twist in Philadelphia is that conventioners receive advance materials from



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WASHINGTON, DC

Cultural Tourism DC gets a million dollars a year from dues-paying members, government, foundations and the downtown business improvement district.

- 1 Tour of Washington, D.C.
© Cultural Tourism DC
- 2 Civil War Reenactment
© Cultural Tourism DC
- 3 Cultural Tourism DC Website
© Cultural Tourism DC

famous natives like Kevin Bacon and Frankie Avalon promoting their favorite Philadelphia experiences, from mainstream museums to the Italian Market to the Mummers Parade.

Infrastructure has become a focus of attention. In cities like Philadelphia, New York, Boston, Pittsburgh and Chicago, business improvement districts work to keep major tourist areas free of litter, graffiti and panhandlers. In Washington and Philadelphia, tourism organizations partnered with cultural and heritage groups to develop walking trails marked by well-designed and informative map panels. Signage is another part of the infrastructure picture – a seemingly simple but actually major undertaking that requires many sectors to work together. Pittsburgh, Philadelphia, St. Louis and Cleveland are good examples of cities where tourism interests have helped to create well-designed, pedestrian-scale graphic systems that help people navigate on foot or by car.

Product Development is a form of capacity building. Well-traveled cultural and heritage visitors expect fresh experiences. Foundations in Cleveland and Philadelphia have contributed to the upgrade of key cultural sites and the creation of more engaging exhibits at museums. If you traveled to Chicago 30 years ago and were interested in architecture, you were on your own. Today, visitors have a choice of more than 30 guided tours of

architecture and neighborhoods. The Chicago Architecture Foundation organized the tours, trained 200-plus volunteer guides and produced the materials. Buffalo Niagara could take another cue from Chicago, which is working to capitalize on its equally frigid reputation through "Chicago Winter Delights – It's A Cool Place!," a series of activity-filled, themed weekend packages.

As in all industries today, **technology** is central to cultural tourism. Tourism websites such as www.visitpittsburgh.com, Washington D.C.'s www.culturaltourismdc.org, Philadelphia's www.gophila.com and Buffalo Niagara's www.gobuffaloniagara.com use excellent design and graphics to convey a sense of quality and excitement. Some offer dynamic packaging: you can create your own itinerary and hotel package online. Websites can become a tool for research (conducting pre- and post-visit surveys) or promotion (pop-ups with Buffalo Niagara messages could link to user travel inquiries). Websites can also provide a platform for inter-organizational communication and planning, as the Buffalo Niagara Cultural Tourism Initiative itself has demonstrated through its project website (www.regional-institute.buffalo.edu/bncti).

Funding is always a key issue. The most successful cultural tourism efforts enjoy secure, long-term and dedicated revenue streams. But the sources vary. Cultural Tourism DC gets a

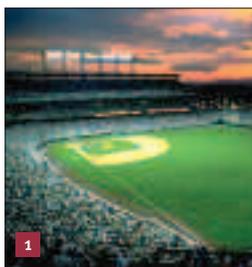
Metro Denver's Remarkable Self-Investment

Denver's Scientific & Cultural Facilities District (SCFD), a seven-county funding district, pumps \$35 million annually into Denver organizations which "provide for the enlightenment and entertainment of the public through...art, music, theater, dance, zoology, botany, natural history or cultural history" (see www.scfcd.org).

A 10-member board oversees distributions to three tiers of recipients. In the top tier are four major regional organizations: Denver Art Museum, Denver Botanic Gardens, Denver Museum of Nature & Science and the Denver Zoo. Tier 2 includes regional organizations with operating incomes above \$900,000. Tier 3 includes nearly 300 smaller theaters, orchestras, museums and art centers.

Metro citizens benefit from SCFD-funded activities. More than 9 million people attended one or more of them in 2001. Because the SCFD tax is a 'sales and use tax,' almost 900,000 out-of-state visitors help defray the cost by spending millions on tourism. Sponsors say SCFD has helped make Colorado a great place to live, work and play.

Leaders in Denver understand what the Buffalo Niagara region needs to learn: growth in cultural tourism depends on development of cultural institutions into visitor-ready attractions. Providing adequate and predictable funding on a rational, equitable and transparent basis is critical to that process.



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Denver provides \$35 million a year for cultural tourism development and promotion from a seven-county sales and use tax.



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- 1 Coors Field
© Denver Metro Convention & Visitors Bureau
- 2 The Pavilions
© Denver Metro Convention & Visitors Bureau
- 3 Denver as seen from City Park
© Denver Metro Convention & Visitors Bureau

DENVER

Other Organizational Models in Buffalo Niagara

There are many governance models in Buffalo Niagara which can inform this initiative and its ultimate organizational structure. The Greater Buffalo-Niagara Regional Transportation Council is an interagency transportation planning group that establishes policies and programs for the region (see www.gbnrtc.org). Its policy board and planning and coordinating committee, composed of several key implementing agencies, aggressively reaches out to citizens. A strong professional staff helps the agency carry out its broad coordinating role. The GBNRTC is funded by federal highway and transit agencies.

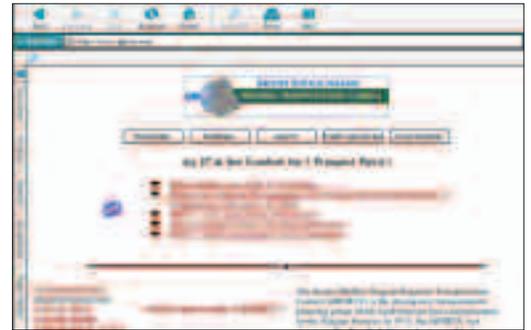
Similarly, the Buffalo Niagara Medical Campus combines strong leadership by stakeholders and dues-paying members – Kaleida Health, Roswell Park Cancer Institute, Buffalo Medical Group, Hauptman-Woodward Medical Research Institute and the University at Buffalo – with structured participation by a wide variety neighboring organizations and businesses (see www.bnmc.org). A small, dedicated professional staff carries out critical work in physical planning, development and maintenance of the campus; assistance to adjacent neighborhoods; promotion of entrepreneurial spin-off activities; and support for core missions of the member organizations.

million dollars a year from dues-paying members, government, foundations and the downtown business improvement district. Philadelphia passed a one-percent increase in the hotel sales tax at the urging of the hotels themselves (see sidebar: *“Greater Philadelphia!”*). Denver provides \$35 million a year for cultural tourism development and promotion from a seven-county sales and use tax (see sidebar: *“Metro Denver’s Remarkable Self-Investment”*). Increasingly, public funding streams are tied to performance measures, as Missouri has done and Pennsylvania intends to do. Arts, culture, historic and natural venues enjoying new investments are likely to measure up because they are more attractive and better known.

Governance that spans political boundaries is increasingly important. Because the major funding source often involves local or county government, visitor bureaus tend to compete with each other more than they cooperate. Yet, visitors do not plan their vacations within county lines; they plan by region, or by events and attractions. Marketing that takes such visitor behavior into consideration is becoming more widespread. For instance, “Philadelphia and Its Countryside” is the name used by six visitor bureaus (in three states) working together as the Greater Philadelphia Tourism Marketing Corporation.

Organizational structures are changing to meet new realities. In Washington, D.C., the visitors’ bureau is responsible for keeping the new convention center booked while Cultural Tourism DC handles marketing the city to the independent traveler – not an unusual division of labor. In Denver, cultural attractions are categorized as Tier 1, Tier 2 and Tier 3 by the size of their budgets; they receive support accordingly.

Across the continent in cities as diverse as Dallas; Toronto; Mobile, AL; Albuquerque, NM; and Vancouver, WA, cultural tourism organizations are addressing similar challenges in common ways: providing dedicated staff to do critically important work that is no one else’s job; constructing broadly representative boards to sustain political and organizational support; improving research on culturally motivated visitors; resolving to measure progress against concrete benchmarks and track economic impacts; involving key community leaders to move fundraising forward; providing training to



Website of Greater Buffalo-Niagara Regional Transportation Council © GBNRTC

improve nonprofit business practices; and looking for an appropriate organizational home for their initiatives.

Two promising organizational models are to be found right here in our own region: The Greater Buffalo-Niagara Regional Transportation Council, which addresses transportation issues on a regional level, and the Buffalo Niagara Medical Campus, which integrates neighborhood organizations and businesses into the medical campus’ decisions (see sidebar: *“Other Organizational Models in Buffalo Niagara”*).

The strategy for developing cultural tourism in Buffalo Niagara is the outcome of a two-year planning process undertaken by arts, cultural and tourism stakeholders. It puts forth a three-pronged approach:

1. **Coordinated programming.** Leverage the drawing power of many of the region's distinguished cultural venues and special events to attract a wider audience and expand visitation to these specific attractions and the region's wider range attractions, cultural and otherwise.
2. **Targeted marketing.** Coordinate promotional resources and build research-based marketing strategies to support cultural tourism programming, penetrate niche markets and expand market share.
3. **Systemic improvement to the cultural tourism system.** Develop the support structures for cultural tourism organizations and the entire system. These include data collection, administrative efficiencies, technology applications, transportation and signage, capital improvements, education and training and research.

a. Coordinated programming: Leveraging our best assets

Buffalo Niagara already has several high profile events on the horizon, many significant new



- 1 **Old Fort Niagara**
© Buffalo Niagara Convention & Visitors Bureau
- 2 **Underground Railroad Re-Enactment, Motherland Connexions**
© Buffalo Niagara Convention & Visitors Bureau
- 3 **Albright-Knox Art Gallery during the Pan-Am Exhibition**



assets in development and major improvements to existing resources under way. This strategy seeks to position these attractions and events as *centerpiece* features of coordinated, or clustered, cultural tourism programming, and as focal points for attracting visitors to the Buffalo Niagara region. It is essential to tap in a timely fashion the full potential of any cultural tourism happening or asset likely to capture media attention and more visitors from beyond our regional borders.

Many attractions and events in Buffalo Niagara would serve as ideal centerpieces to anchor a multi-year cultural tourism program. The sequence of centerpiece and coordinated programming would gradually build the entire cultural tourism system through capacity building and infrastructure improvements. Possible centerpieces include: the opening of Frank Lloyd Wright's Darwin D. Martin House; the centennial of the Niagara Movement, precursor to the NAACP; dedication of the new visitor's center at Old Fort Niagara; completion of the Erie Canal developments and major renovations at the Buffalo Zoo. Major exhibits of visual arts or natural history, and festivals of music, theater, literature or dance are also potential candidates for centerpiece attractions.

Whether ongoing attractions or one-time special events, these attractions are necessary as part of an effort to break down the

Centerpiece attractions might include major exhibits of visual arts or natural history and major festivals of music, theater, literature or dance.



What Do These Words Mean?

A “**centerpiece**” attraction is not merely a major venue or event. It must be one of such significance beyond our immediate region that it generates widespread interest and national media attention. It must be truly “world class.”

Being world class in this regard means, of course, that the venue's persons, stories or events are of a certain significance. It also means that the quality of the venue or experience is of the highest order.

“**Experience clusters**” encompass those attractions that are related substantively or thematically to the centerpiece. Buildings by Louis Sullivan, H.H. Richardson, Eliel Saarinen, EB Green and others are linkable in this way to works by Frank Lloyd Wright. This would be the case as well for exhibits, performances and events with an architectural theme.

But not everything that a visitor comes to experience is part of an experience cluster. Visitors may attend a professional sporting event, enjoy live music at a club or concert, play golf, tour wineries or see Niagara Falls. They may also dine out or stay in area hotels. Such attractions can be promoted and packaged, but they stand behind the centerpiece and experience cluster attractions.

“**Asset Families**” Buffalo Niagara's many arts, culture and heritage resources make it easy to group them into major asset families. Some examples include:

- Architecture
- Performance Theater
- African-American Experience
- War of 1812/Historic Battles
- Landscapes and Nature
- Natural History
- Maritime History
- Visual Arts
- Native American Heritage
- Sports
- Wine/Food

“The Wright Stuff”

Conversations are already taking place to create the first in a series of centerpiece attractions and related experience clusters around Frank Lloyd Wright's Darwin D. Martin House starting in 2005.

The venue partners, including the Martin House Restoration Corporation, the Albright-Knox Art Gallery, owners and promoters of Buffalo's other great architectural treasures and Buffalo Niagara Convention & Visitors Bureau, are capable of putting together a great program.

With *A Cultural Tourism Strategy*, organizers of the program will have dedicated professional staff to help develop and manage the program; convene key participants; conduct, analyze and share research; create related programs, packages and marketing campaigns; address infrastructure issues that bear on the attractions; and evaluate programming and estimate economic impact.

A Cultural Tourism Strategy will also help smaller cultural venues and other tourism interests join in the programming. To some extent this amounts to “piggybacking” on the major attractions. But the participation of smaller, high-quality, local attractions can make the collective product more robust and appealing.

Indeed, visitors want to know there is more to the story. Examples of these connections could include promoting architectural photography by local artists at the CEPA Gallery, or even directing visitors to the Buffalo Zoo, which is one block away from the Darwin D. Martin House.



1 Graycliff Mansion

2 H.H. Richardson Towers

3 Darwin D. Martin House
© Buffalo Niagara Convention & Visitors Bureau



...it is likely that the first cycle of programming will make the opening of the Darwin D. Martin House a centerpiece, with the experience cluster featuring other Frank Lloyd Wright buildings, the Roycroft Inn and perhaps masterpieces by H.H. Richardson, Louis Sullivan and others. Venues such as the Albright-Knox Art Gallery should also be engaged.



perceptual barriers that prevent visitors from coming here. Indeed, they have the power to draw those who otherwise may not have considered Buffalo Niagara an appealing tourist destination. And once here, these visitors would be invited to experience other related attractions and enjoy anything else in the region that may be of interest. Such attractions would be packaged into *experience clusters* focused around the centerpiece to enrich and expand the visitor's experience in the region. For instance, visitors to Underground Railroad exhibits at the Jesse Nash house on Michigan Avenue in Buffalo would likely also visit the Colored Musicians' Club or interpretive sites at the Old Customs House in Niagara Falls. Those interested in Frank Lloyd Wright might also stay to experience the works of Louis Sullivan, H.H. Richardson, Frederick Law Olmsted and others. The scope of the experience cluster would predictably extend beyond cultural, arts and heritage experiences to include Niagara Falls, sporting events, restaurants, clubs, amusement parks and shopping.

To illustrate the concept of coordinated programming, potential examples are provided as sidebars (*“The Wright Stuff”* and *“Erie Canal? The Avant Garde? Underground Railroad?”*). Each cycle of coordinated programming will need to be planned in detail by the participating institutions. The examples below, therefore, are necessarily suggestive until the recommended planning process is conducted. As

acknowledged throughout this strategic project, practical implementation is absolutely essential to make the entire effort worthwhile.

Given ongoing fundraising, construction and product development efforts, it is likely that the first cycle of programming will make the opening of the Darwin D. Martin House a centerpiece, with the experience cluster featuring other Frank Lloyd Wright buildings, the Roycroft Inn and perhaps masterpieces by H.H. Richardson, Louis Sullivan and others. Venues such as the Albright-Knox Art Gallery should also be engaged. It must be understood, however, that this will be only the first cycle of programming, and others could feature the Erie Canal, visual and performing arts and the Underground Railroad. Others will follow as they become visitor ready.

b. Targeted marketing: Leading with research

A Cultural Tourism Strategy also calls for linking coordinated programming to targeted marketing. At the core of this strategy is matching a compelling message – the “hook” – to worthy centerpiece attractions in a way that would generate national or regional publicity and interest and allow for the design of targeted marketing efforts.

Other cultural institutions could harness their own efforts to the drawing power of

centerpiece attractions as they see fit, mounting related exhibits or events, joining a shared promotion initiative, participating in a package offering, coordinating scheduling with the centerpiece, or simply carrying on as usual. Participation would be welcome, but never mandatory.

Specific marketing strategies should be generated by an analysis of potential centerpiece and experience cluster offerings as informed by ongoing market research and post-program evaluation. The target audience for an exhibit of robots at the Buffalo Museum of Science or the unveiling of a new aquatic mammal habitat at the Buffalo Zoo would be different from the target market for a special exhibit on Abstract Expressionism at the Albright-Knox Art Gallery or the opening of a new wing of the Burchfield-Penney Art Center. Marketing messages and media would likewise be different for each.

Several generic strategies, however, should be developed. The first involves programs, messages and media for encouraging long-distance Niagara Falls tourists to visit other regional attractions. A second should focus on attracting a national audience of cultural tourism visitors through centerpiece promotions. A third should concentrate on drawing visitors from a broad regional market – "the rubber-tire traffic" – in Cleveland, Pittsburgh, Toronto and upstate New York.

In each case, however, the region needs to convene potential partners, analyze and present relevant research and negotiate agreed upon marketing strategies and programs among the participants. It is essential that these synergies not be missed or potential conflicts left unresolved. With strong coordination the program can deliver growing audiences to the centerpiece attractions, experience cluster venues and all tourism sites.

c. Systemic improvement: Filling the gaps

Finally, the strategy intends to connect coordinated programming and targeted marketing with an organized approach to building the support structure for cultural tourism organizations and the system in which they function. This is an important part of the strategy, as it delivers benefits to all cultural, arts and tourism venues, regardless of their participation in the experience cluster. This structure for ongoing, systemic improvements for cultural tourism should focus on filling the critical gaps in cultural tourism. These gaps, which are reviewed in detail in Section III of this report, are as follows:

- Long-term planning on a region-wide basis;
- Improvements to infrastructure;
- Conducting research, evaluating programs and strategies;
- Providing education and training services;
- Identifying and learning from best practices;
- Applying technology;
- Fostering collaboration;
- Pursuing shared services;
- Improving cultural tourism governance.

These gaps would be filled as coordinated programming and targeted marketing efforts progress. At the same time, a stronger foundation for the cultural tourism system would bolster subsequent coordinated programming and targeted marketing efforts. Consider, for instance, that each program cycle would require advanced planning,

Once here, visitors would be invited to experience other related attractions...which would be coordinated around the centerpiece to enrich and expand the visitor's experience.



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- 1 WNED Buffalo Niagara Guitar Festival
© Buffalo Niagara Convention & Visitors Bureau
- 2 Lockport Locks & Erie Canal Cruises
© Buffalo Niagara Convention & Visitors Bureau
- 3 Artpark Theatre © Artpark & Company, Inc.
- 4 Shakespeare in Delaware Park
© Buffalo Niagara Convention & Visitors Bureau
- 5 Buffalo Zoo

Erie Canal? The Avant Garde? Underground Railroad?

The Buffalo Niagara region has more potential world-class stories and attractions than most places. But realizing that potential requires long-range planning, major investments and much teamwork.

For instance, several Erie Canal developments are in "the pipeline" but still several years from completion. The story more than meets the test of being "world class." But to create such an attraction, other events in the canal area need to take place. For instance, the canal's historic Commercial Slip would need to be completed, related interpretive facilities constructed, and perhaps a new Buffalo & Erie County Historical Society developed nearby. Also, Bass Pro Shops has made official its plans to develop by 2007 a \$123 million retail complex in this area. Certainly there is the potential for a powerful synergy of attractions.

But planning for programming and marketing to showcase the entire canal package of attractions should begin now. Also, its not too early for others to consider related exhibits, performances or events that could accompany unveiling the Erie Canal.

A less capital-intensive centerpiece and experience cluster might celebrate Buffalo's historic involvement with *avant garde* art, highlighting the Albright-Knox Art Gallery's collection of modern art, celebrated artists who emerged at Hallwalls Contemporary Arts Center, or a retrospective on the tenure of Lukas Foss at the Buffalo Philharmonic Orchestra.

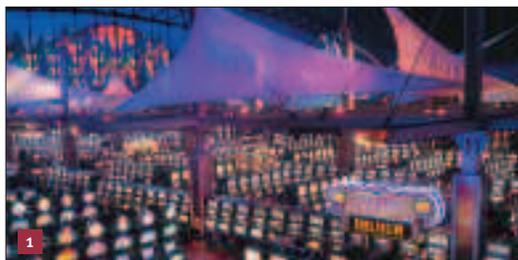
collaboration and coordination among the region's cultural, arts, heritage and tourism organizations, staged investments in featured venues and overall work on visitor readiness and tourism infrastructure. Each cycle would produce data and generate research to assist in the evaluation of attractions and the formulation of subsequent marketing strategies to reach target audiences. This same information would be valuable in conveying to the region the value of arts and cultural institutions as economic development assets. Indeed, ongoing promotional programming, venue improvements and increased visitation would reinforce Buffalo Niagara's brand identity as a place that offers quality cultural, artistic and heritage experiences.

Efforts should also focus on building capacity at the organizational level through training and education, board development and strategic capital improvements. In addition to these specific efforts, individual cultural organizations would be expected to gain strength as the system for cultural tourism in the region improves. All venues benefit from increased traffic, a coordinated governance structure, and better transportation, signage and data collection. Moreover, the strategy presented here is sustainable. Experience cluster attractions improve as they strive to meet new demands. Past centerpieces become stronger resources for

the region. And the region will never run out of new centerpieces as long as it continues to invest in cultural facilities, exhibits and events.

As an iterative process, *A Cultural Tourism Strategy* is designed to produce growing organizational capacity, expand market knowledge, widen cooperation, improve visitor experiences, expand audiences and revenues, and build an increasingly more favorable regional image and stronger brand. As each cycle of programming reinforces individual attractions and the critical infrastructure needs of the cultural tourism system, the industry's overall base will deepen. Likewise, as each targeted marketing program highlights new assets and draws in new visitors, the overall regional brand will become increasingly associated with a top-tier tourism experience.

The scope of the experience cluster would predictably extend beyond cultural, arts and heritage experiences to include Niagara Falls, sporting events, restaurants, clubs, amusement parks and shopping.



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- 1 Seneca Niagara Casino
© Buffalo Niagara Convention & Visitors Bureau
- 2 Niagara Falls
© Buffalo Niagara Convention & Visitors Bureau
- 3 Buffalo Sabres
© Buffalo Niagara Convention & Visitors Bureau

VI. IMPLEMENTATION

a. Organizing for Implementation: Performance-based leadership and collaboration

Following stakeholders' development of the cultural tourism strategy, a small working group of funders, government representatives and key cultural and tourism groups began a process of formulating a structure for implementation of the plan. These focus groups have concentrated on responding to the ideas and concerns of cultural tourism stakeholders with a practical plan for the strategy's implementation, working to ensure that the vision of the stakeholders is turned into reality, and that their plan does not join the ranks of others gathering dust on a shelf.

As determined by stakeholders, a prerequisite for the success of the implementation structure is active leadership by professionals directly responsible for developing cultural tourism. Also critical is support from key partnerships and new financial resources to commit toward additional or improved capacity. Given the scarcity of new funding and the plethora of ongoing efforts, collaboration and improved coordination must be a focus of the implementation structure. Moreover, any new organizational structure for cultural tourism would be required to satisfy the following key requirements:

- Develop an approach that addresses cultural tourism as a distinct focus rather than only as a subset of broader tourism development activities;
- Form a structure of governance and an approach to implementation that ensures full involvement by relevant actors in both Erie and Niagara Counties, including the full range of cultural, arts and heritage organizations; all segments of the tourism industry (promotion, hospitality, transportation and others); businesses; government; philanthropy; and education;

- Create a preliminary business plan that details proposed membership/staff qualifications and responsibilities; annual expenditures for personnel, supplies and services; and conceptual design proposals for performance measures;
- Develop an approach to long-term funding, including an estimate of total revenue required and a proposal for other dedicated sources.

Based on these principles and the fundamental tenets of *A Cultural Tourism Strategy*, a bilateral structure that focuses on the two primary components of the cultural tourism system – **marketing** and **asset development** – as well as the infrastructure needs within each, has been proposed as a three-year pilot for implementation of the strategy. This model recognizes the different but complementary natures of marketing and asset development (*outlined in the table below*), and that each must be improved if cultural tourism is to be effective in Buffalo Niagara.

Marketing		Asset Development
Tourist-focused (out of area, likely to stay in hotel)	1	Visitor-focused (residents plus tourists, sustainable audiences)
Data-driven – macro level, across organizations and genres (“mines data”)	2	Data-driven – micro level, specific to organization and genre (provides data to macro)
Top-level community infrastructure (street signs, languages, transport, etc.)	3	Internal organization infrastructure (systems and processes, management)
High return, short period	4	Incremental return, longer period
“Culture-plus” packages, ready now, including “other-than-cultural” assets	5	Art according to mission, offered in collaboration
Primarily concerned with high-ticket, high-draw, “first-tier” cultural already prepared to anchor	6	Primarily focused on strengthening critical “second tier” organizations that provide full “cluster” experience

In this structure, asset development is seen as a separate activity that works directly with marketing to provide viable, fuller tourism packages that can be marketed regionally and to key identified external markets. “First-tier” organizations which are more advanced as a group in terms of visitor readiness will likely be more prepared to work with immediate priorities for cultural tourism marketing, although many could benefit from some degree of capacity building. However, more critical is organizational development of “second-tier” groups, which vary widely in their strengths

Buffalo Niagara’s Commitment to Culture and Tourism

Local governments and area foundations continue to commit substantial resources to cultural, arts and heritage organizations in Buffalo Niagara.

Erie County provided about \$20 million in direct aid in 2003, 25 percent of which was distributed to individual organizations through the independent Erie County Cultural Resources Advisory Board. The county’s public benefit fund was the source of about \$3.5 million, mostly for promotional activities. The capital budget provided another \$5 million to cultural tourism-related venues in 2003. About half of the Erie County hotel bed tax – \$2.9 million in 2003 – went to fund operations of the Buffalo Niagara Convention & Visitors Bureau.

In Niagara County a hotel bed tax generates roughly \$1 million a year for the Niagara Tourism and Convention Corporation. Niagara County municipalities also provide some support.

The region’s private foundations are among the strongest champions of culture and tourism in Buffalo Niagara. In 2002, The John R. Oishei Foundation delivered \$1 million to cultural organizations and related projects, while The Margaret L. Wendt Foundation pumped \$5 million in cultural funding into the region in 2001, largely for the restoration of the Darwin D. Martin House. Independent Health, M&T Bank, the Community Foundation for Greater Buffalo, the Statler Foundation and HSBC Bank are also important financial backers for arts, culture and tourism.

For the most part these funding streams are directed either at tourism promotion or the operations and capital needs of cultural groups, but not for cultural tourism per se.

As this strategy goes to print, Erie and Niagara Counties are facing extraordinarily difficult fiscal dilemmas. The ramifications of their budget deliberations will doubtless significantly affect the future of cultural tourism funding.

CULTURAL TOURISM

Geographic Scope: Erie and Niagara Counties (in context of larger region)
 Strategy: (1) Fill gaps; (2) Measurably move forward, meet potential for cultural venues, tourism, economic development, quality of life

CT Oversight and Advisory Council (board and executive level)

Marketing (BNCVB, NTCC)

- Filling the gaps (system-level infrastructure, signage, data, etc.)
- Big Picture (connection to tourism, hospitality)
- Promotion/Packaging/Branding
- Experience Clusters
- Cultural Tourism Committee

STRATEGIC PLAN

CT Working Group (prof. staff)

Asset Development

(Regional Asset Development Coordinator – reports to Oversight and Advisory Council – in conjunction with umbrella arts groups, academic institutions, others.)

- Build Capacity, Visitor Readiness
- Organizational Infrastructure (data collection, etc.)
- Capital Needs
- Consulting to strengthen organizations, board development, budgeting, etc.

STRATEGIC PLAN

- Cultural Alliance of Niagara, Chair
- Corporate Funders (e.g., M&T Bank, Independent Health)
- Private Funders (e.g., The John R. Oishei Foundation, The Margaret L. Wendt Foundation)
- Public Funders (Erie County, Niagara County)
- Erie County Cultural Resources Advisory Board, Chair
- New York State Council on the Arts, Representative
- Board Chairs – Buffalo Niagara Convention & Visitors Bureau; Niagara Tourism & Convention Corporation

Working with the Advisory Council will be the **Cultural Tourism Working Group** consisting of professional staff from cultural, arts and tourism organizations in Erie and Niagara Counties, and focusing on day-to-day implementation tasks.

but are essential to development of a diverse cultural tourism program.

Actual implementation will be monitored by a **Cultural Tourism Oversight and Advisory Council**, composed of board- and leadership-level representatives from cultural, arts and tourism organizations, as well as government and funding entities from both Erie and Niagara Counties. The Advisory Council will provide policy perspective and coordinate the resources for implementation of *A Cultural Tourism Strategy*.

The structure is designed to facilitate collaboration between Erie and Niagara Counties and across the broader binational region, and to forge connections between different sectors related to cultural tourism, including economic development, government, philanthropy and education. Accordingly, suggestions for the Advisory Council's membership are as follows:

- Cultural Tourism Committee, Chair – Buffalo Niagara Convention & Visitors Bureau

Integral to the Working Group will be a **Regional Asset Development Coordinator**, a new position created solely to build the capacity of arts and cultural groups by assisting them with organizational assessment, access to resources and materials, and appropriate training and consultation. The coordinator will report directly to the Chair of the Advisory Council (see *Appendix E* for a more detailed job description and references to a similar capacity building model in the region). An administrative assistant will provide support both to the coordinator and the Advisory Council. Again, considering collaboration across geographic and sector boundaries, recommendations for the Working Group's membership include:

- Regional Asset Development Coordinator
- Buffalo Niagara Convention & Visitors Bureau, Niagara Tourism and Convention Corporation, Marketing Directors
- Binational Tourism Alliance, Representative
- Arts Council in Buffalo & Erie County, Representative
- Cultural Alliance of Niagara, Representative

- Erie County Cultural Resources Advisory Board, Staff Member

In terms of a marketing focus, the Advisory Council and Working Group will collaborate with the region's promotional groups, primarily the Buffalo Niagara Convention & Visitors Bureau (BNCVB), especially its Cultural Tourism Committee, and the Niagara Tourism and Convention Corporation (NTCC), to build the Buffalo Niagara brand as a tourism destination through the development, promotion and packaging of asset clusters. It is also a goal to position these cultural tourism efforts within the bigger picture of tourism. As a result, these promotional agencies are ideally positioned to link cultural tourism clusters with other tourism and hospitality resources.

The Advisory Council and Working Group will partner with promotional and cultural organizations to fill gaps in marketing data collection and analysis and performance measurement. Improvement of system-wide infrastructure, such as signage and transportation, will also be a priority.

On the asset development side, the Advisory Council and Working Group will link with umbrella cultural groups academic institutions and relevant marketing associations to build the capacity of individual cultural, arts and heritage groups through training and assistance with program development, financial stability and board strength. Infrastructure improvements at the organizational level – including data collection and capital improvements – will be an important focus of asset development.

There is no question that continued planning and strategy development should be a perpetual part of the cultural tourism system in the region, but as a part of practical implementation, not just continued planning. It is anticipated that as a part of the transition from planning to implementation the work of the Steering Committee of the Buffalo Niagara Cultural Tourism Initiative will conclude as the focus shifts to the new organizational approach.

A Cultural Tourism Strategy proposes a wide spectrum of goals to serve as the general context for implementation of the strategy over the long term. To assist with initial

implementation tasks, an initial set of priorities follows as a specific example of the short-term value of the strategy and organizational approach. Of course, one of the first challenges of implementation will be to catch up with planning for the first cycle of coordinated programming already well under way.

b. Recommendations: from strategy to action

The following is an outline of the specific responsibilities of the Advisory Council and Working Group. Primarily, they are to work together to oversee and coordinate a governance structure for cultural tourism, and to establish a forum for communication, coordination, collaboration and long-term planning that engages all relevant and interested parties.

A priority for implementation will be coordinating the development of programming cycles, targeting marketing efforts and infrastructure improvements related to each through collaboration with the region's tourism, arts, culture, heritage, economic development and marketing organizations. These three components of the strategy are outlined as follows:

- **Organize multi-year, coordinated programs** of cultural attractions linking the best cultural venues and events in our region ("centerpieces") with other related attractions of excellence ("experience clusters") to draw visitors from our region and beyond.
- **Develop targeted marketing** for coordinated programming that is strategically aimed and research-driven, coordinates promotional activities and reaches a broad market, including identifiable niche markets.
- **Promote infrastructure improvements at the systemic and organizational levels.** For instance, capacity building for cultural, arts and tourism venues could include capital improvements, board development and financial/budgetary training. Enhancements to system-wide infrastructure should work toward filling current gaps in research, data collection, education and training, transportation, information infrastructure, planning and capital budgeting.

In its implementation of the strategy and each cycle of coordinated programming, the Advisory Council and Working Group are to maintain both the perspective of the entire cultural tourism system as well as the individual organizations within that system. Also, these groups must keep in mind their role as the region's vehicle for long-term cultural tourism planning and development. Indeed, implementation activities should be seen in relation to the broader mission of cultural tourism promotion in the region: generate greater strength and stability for cultural organizations, expand opportunities for individual artists, grow the regional economy, enhance community quality of life, and improve the region's image and identity.

The initial **specific responsibilities and recommended actions** of the Advisory Council and Working Group are outlined according to the three-pronged strategic approach:

Coordinated Programming

- Designate the Frank Lloyd Wright Darwin D. Martin complex as the "centerpiece" for the first cycle of coordinated programming, timed to coincide with the 2005-2006 opening of the restored complex;
- Coordinate with the cluster of people and groups already engaged in the Martin House initiative;
- Identify other venues and events to include in the related "experience cluster" by virtue of thematic or geographic relation to the Martin House (e.g. other historic architecture, the Buffalo Zoo, Shakespeare in the Park, etc.);
- Identify other tourism attractions and support services to incorporate in the coordinated program (professional sporting events, wineries, Niagara Falls, musical clubs, hotels, restaurants, etc.);
- Develop a "template" for future coordinated programming efforts that includes criteria for choosing centerpiece attractions and experience cluster venues and a process for experience cluster development.

Targeted Marketing

- Identify specific target markets for the initial centerpiece and its related attractions using existing research and new research as necessary;
- Develop a marketing campaign aimed at identified market segments and "niches"

using shared promotional messages to reach potential visitors;

- Create a comprehensive media relations campaign to generate national and regional publicity that reinforces targeted messages;
- Design promotional programs to allow cultural institutions – regardless of their inclusion in the "experience cluster" – to link their own efforts to the coordinated program;
- Develop a long-term research program and the capacity to support planning for subsequent centerpiece/experience cluster programs, including cooperative arrangements to collect, analyze and share data on a regional basis.

Systemic Improvement

- Identify and coordinate priority venue- and event-capacity building and system development investments; create a long-term workplan for system development. These efforts should be placed in the context of the current gaps in the Buffalo Niagara cultural tourism system:

- 1) Develop infrastructure for cultural tourism, working to create and maintain the systems that connect venues to one another and deliver visitors to the doorsteps of the region's attractions;
- 2) Coordinate education and training to ensure regional institutions can satisfy the emerging needs of the cultural tourism system for qualified workers, managers and leaders;
- 3) Conduct research through a system for collecting, analyzing and sharing information on a regional basis, coordinating the region's existing data collection efforts and developing new ones as needed (see Appendix D, "Measuring Performance");
- 4) Collect and share best practices from other regions and our own on effective techniques and strategies for developing cultural tourism;
- 5) Apply technology, including websites, databases, telecommunications and other systems to help individual organizations and the entire sector communicate with potential markets, serve audiences, evaluate performance and conduct research;
- 6) Provide shared services such as ticketing, payroll, insurance, purchasing and research to save organizations money and time and improve the efficiency of the cultural tourism system.

Performance Measurement

The Advisory Council and Working Group are to closely monitor their performance in terms of their effectiveness both as implementing entities of *A Cultural Tourism Strategy* and as catalysts for the broader success of regional asset development and marketing efforts. Such assessments should take place regularly and systematically throughout the entire three-year pilot period.

Measures of success for asset development efforts in the implementation of *A Cultural Tourism Strategy* are to be guided by the goals of 1) strengthening and building cultural capacity to sustain operations and serve audiences, and 2) preparing cultural, arts and heritage organizations for tourism receptiveness. The Advisory Council and Working Group will assess targeted cultural, arts and heritage groups in terms of their performance in key indicators of financial strength, strategic directions and visitor-readiness using clear benchmarks and newly developed systems and sources of information. They will also need to determine priorities for key capacity building investments and establish programs and strategies for reaching those benchmarks.

The region must also be able to measure its success in the development of the cultural tourism market. The following goals should guide these efforts: 1) attract larger audiences to the region and its cultural and tourism attractions, 2) reach new markets, 3) improve the image of Buffalo Niagara as a tourism destination and, 4) improve data collection and analysis efforts, information sharing and message coordination. The Advisory Council and Working Group should first determine marketing priorities, including markets to target, data to collect, infrastructure improvements to make and technology applications to develop. Such prioritization should be based on an evaluation of the region's current approach, and in consideration of asset development efforts for Buffalo Niagara's cultural organizations. Any new or reformed marketing initiatives should coordinate with existing efforts to ensure the region is moving toward its broader cultural tourism marketing goals. Benchmarks for success, such as economic impact, the quantity and quality of visitation and related data and

the perceptions of the region as a tourist destination, should be clearly outlined and regularly monitored.

Following implementation of these programs and investments, participation and success should be measured against quantifiable benchmarks outlined at the outset (for more information, see Appendix D, "*Measuring Performance*").

c. Funding: Sustaining cultural tourism development

Of course ultimate success – and achieving the vision of Buffalo Niagara as a world-class tourism destination – requires the commitment of resources to sustain this work over the long-term. While the region now commits substantial resources to both tourism promotion and to the sustenance of arts, cultural and heritage organizations, there is a clear need for additional funding specifically for cultural tourism. Indeed, in light of the great potential of cultural tourism, it must be said that the pursuit of this mission is uncoordinated and in many respects significantly underfunded.

Financial support for this strategy should come from both existing sources and from new and previously untapped sources. In any event, cultural institutions cannot be expected to divert current resources from basic operations to fund the strategy. Success for *A Cultural Tourism Strategy* must depend in large measure on a predictable and adequate source of funding. Sources might include a dedicated portion of the bed tax and/or sales tax; a multi-year gift from a major foundation or group of philanthropies; discretionary funds from local government; contributions from corporate sponsors; or perhaps a small surcharge on Niagara River bridge crossings. It is likely that a combination of these sources will be used. Further support should come from the earned revenues of participating cultural organizations.

It has been estimated that the Advisory Council and Working Group will operate under an annual budget of about \$210,000 which would cover the salaries of the Asset Development Coordinator and a part-time administrative assistant, and would include

\$100,000 for training subsidies for capacity building services and consultation. The budget would also cover supplies such as computers and telephones, Internet access, meeting and training support and travel. These funds should also subsidize preliminary implementation efforts, including the development of a short-term business plan, convening participants for the first programming cycle, establishing specific staff performance standards and drafting funding proposals. It is certain that more funding will be needed to support the Advisory Council and Working Group in the specific development of coordinated programming, targeted marketing efforts and infrastructure improvements. These must be funded separately, through special joint programs or initiatives, or through the existing budgets of participating organizations.

Whatever source or sources are identified, funding should be pledged for the

implementation structure's entire three-year pilot to give the effort stability and time to mature.

It is important that the Advisory Council and Working Group develop formal financial statements, including operations pro formas, forecasted income statements, balance sheets, cash flow statements and capital expenditure budgets (as appropriate). It may make sense to detail revenues and expenditures on a monthly or quarterly basis for the first cycle before converting to annual figures. Of course, the projections should match the funding requests and the categories detailed in the implementation section; any inconsistencies undermine credibility.

...MOVING FORWARD

A Cultural Tourism Strategy should be viewed as a beginning, not an ending. A clear and compelling strategy is one of the first prerequisites for fulfilling the potential of cultural tourism for our region, as it represents significant agreement among the region's cultural tourism stakeholders about vision, goals and the practical steps to be taken. But the hard work of implementation remains before us and must be addressed aggressively and in unison.

Indeed, there are several other ingredients – perhaps intangible ones – required for success. Foremost among these is courage. We need the courage of our convictions that greater investments in cultural tourism will bring significantly greater returns. Maintaining the current level of effort or

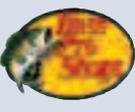
investment will not allow us to change the status quo.

We also need the courage to go beyond our studied habits of work and existing organizational boundaries to engage a truly new process of collaboration. The old ways will not work. The new ways we have begun to create will.

The potential for cultural tourism development – to strengthen cultural institutions, to expand opportunities for expression, to grow our economy, to improve our image and to enhance our quality of life – is enormous, perhaps even greater than we understand. We have already begun working together to make this potential real. It is time to continue.

APPENDIX A

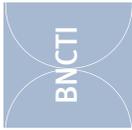
CULTURAL TOURISM AND RELATED CAPITAL INITIATIVES

	PROPOSAL	COST	STATUS
 BASS PRO COMPLEX	Bass Pro Shops is considering building a more than \$100 million retail complex on the Erie Canal Harbor. The project would convert the former Memorial Auditorium into a 150,000-square-foot sporting goods store, a Great Lakes-themed museum, restaurant and hotel. The project also would include a parking garage and other transportation infrastructure improvements.	\$123 MILLION, \$60 million of which has been committed in federal, state and local dollars.	Expected completion of complex is 2007.
 H.H. RICHARDSON COMPLEX	The H.H. Richardson-designed complex, the former Buffalo State Hospital, will be restored. In addition to an expanded wing of the Burchfield-Penney Art Center, the complex could house schools, a Buffalo State College teacher-training center, and art and performance studios.	\$100 MILLION	Funds included in 2004 State of New York budget.
 USA NIAGARA DEVELOPMENT CORP	USA Niagara Development Corp. is working with community leaders to develop in Niagara Falls the Niagara Experience Center, an interactive tourism center and museum.	\$70-\$80 MILLION (preliminary estimate)	\$10 million pledged by New York State. Additional feasibility studies ongoing.
 THE BUFFALO ZOO	The Buffalo Zoo has planned major facility and exhibit renovations.	\$64 MILLION	Under construction; 2010-2012 completion expected
 AQUARIUM OF NIAGARA	The Aquarium of Niagara will either upgrade existing facility or develop a new facility at the site of the proposed AquaFalls near the Rainbow Bridge in Niagara Falls.	\$52 MILLION	Feasibility study ongoing
 ERIE CANAL HERITAGE CORRIDOR	The Western Erie Canal Heritage Corridor Planning Commission has developed a \$50 million tourism and economic development plan for the five western-most counties along the Erie Canal.	\$50 MILLION	Study completed, implementation to commence, pending approval by New York State.
 OLMSTED PARKS CONSERVANCY	The Olmsted Parks Conservancy has applied for a National Park Service grant to study possibility of creating a 40-mile linear park – from Buffalo's South Park along the Niagara River to Old Fort Niagara in Porter.	\$50 MILLION (preliminary estimate)	Feasibility study ongoing
 ERIE CANAL HARBOR	A master plan for development of Erie Canal Harbor in downtown Buffalo was released in early 2004. Plans include development of a heritage tourism destination, with a rewatered Commercial Slip, a new Central Wharf and many cultural, recreational and retail attractions.	\$46 MILLION (+ \$10 to \$12 million for additional interpretive elements)	Capital campaign ongoing; fall 2007 completion date expected

APPENDIX A

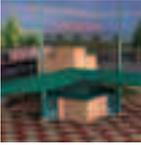
CULTURAL TOURISM AND RELATED CAPITAL INITIATIVES

	PROPOSAL	COST	STATUS
 <p>BUFFALO & ERIE COUNTY HISTORICAL SOCIETY</p>	The Buffalo & Erie County Historical Society has proposed a revitalization plan that includes the building of an interpretive heritage center in the former DL&W railroad station on Buffalo's Erie Canal Harbor.	\$40 MILLION	Feasibility studies ongoing
 <p>BURCHFIELD-PENNEY ART CENTER</p>	The Burchfield-Penney Art Center at Buffalo State College plans to build a new stand-alone museum at the site of the H.H. Richardson Complex, adjacent to the college campus.	\$30 MILLION	Capital campaign completed; \$20 million included in 2004 New York State budget.
 <p>NIAGARA FALLS INTERNATIONAL AIRPORT</p>	Construction of a new terminal and other enhancements have been proposed for the Niagara Falls International Airport.	\$30 MILLION	Capital campaign ongoing
 <p>DARWIN D. MARTIN HOUSE</p>	Frank Lloyd Wright's Darwin D. Martin House will be completely restored, a new visitors center developed and the Martin House pergola, conservatory and carriage house reconstructed.	\$30 MILLION	Renovation of complex and construction of new structures ongoing.
 <p>AMTRAK STATION</p>	The development of an Intermodal Transportation Center & International Railway Station has been proposed in Niagara Falls. The project is centered upon the relocation of the city's Amtrak passenger station to a site adjacent to the Whirlpool Rapids Bridge between the U.S. and Canada as well as the creation of a new Customs and Immigration facility.	\$20 MILLION	Capital campaign ongoing
 <p>BOTANICAL GARDENS</p>	Renovations planned for the Buffalo and Erie County Botanical Gardens include major exhibit enhancements and a new room for weddings and private parties.	\$20 MILLION	Capital campaign ongoing; construction slated for 2005-2015.
 <p>ARTSPACE</p>	Minneapolis-based Artspace has selected a vacant building on Main Street in Buffalo to house as many as 50 artists and their workspaces.	\$12 MILLION	Feasibility study complete; next step is redevelopment and construction
 <p>PIERCE-ARROW MUSEUM</p>	The Buffalo Transportation - Pierce-Arrow Museum will be renovated and expanded.	\$7 MILLION	Construction of the museum addition is expected to be completed in time for the 100th anniversary of the Pierce-Arrow Motor Car Co. in 2006.



APPENDIX A

CULTURAL TOURISM AND RELATED CAPITAL INITIATIVES

	PROPOSAL	COST	STATUS
 OLD FORT NIAGARA	Old Fort Niagara's Gateway to History Campaign includes the development of a visitors' center, renovation of the officers' club, and creation of an orientation theater in preparation for the 200th anniversary of the War of 1812.	\$6 MILLION	Funds raised; design phase ongoing
RIGHTEOUS BABE RECORDS 	Righteous Babe Records will renovate the 128-year-old Delaware-Asbury church into its headquarters, a concert facility as well as home to Hallwalls Contemporary Arts Center.	\$5.8 MILLION	Under construction
 FRANK LLOYD WRIGHT BOATHOUSE	1905 Frank Lloyd Wright boathouse under development on the Black Rock Channel near the Peace Bridge.	\$5 MILLION	Capital campaign ongoing; completion slated for 2006
NAVAL AND MILITARY PARK 	The Buffalo and Erie County Naval & Military Park is undergoing major improvements, including the relocation of naval vessels, creation of a naval basin and construction of a naval museum.	\$4 MILLION	Under construction
 GRAYCLIFF	The Graycliff Conservancy is raising funds for the restoration of the summer home designed by Frank Lloyd Wright.	\$3 MILLION	Capital campaign ongoing; completion slated for 2006-2007
PARKSIDE LODGE 	Parkside Lodge in Buffalo's Delaware Park is being restored to serve as the administration headquarters of the National Association for Olmsted Parks.	\$1.5 MILLION	Under construction
 FRANK LLOYD WRIGHT GAS STATION	Work is underway to build a Frank Lloyd Wright-designed (but never built) filling station as part of the campus of the Buffalo Transportation Pierce-Arrow Museum. The non-working station will focus attention on the impact of the automobile on modern America.	\$1 MILLION	Completion expected in 2005
 HULL HOUSE	The Landmark Society of the Niagara Frontier is restoring the Hull House in Lancaster, built in 1810 and the area's oldest stone residence. It will be converted into an educational interpretive center.	\$1 MILLION	Completion expected in 2005



APPENDIX A

CULTURAL TOURISM AND RELATED CAPITAL INITIATIVES

PROPOSAL

COST

STATUS



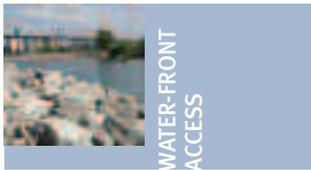
The Albright-Knox Art Gallery plans to add a new wing or a new building.

Pending feasibility study



Significant investments have been made to develop the Michigan Street Preservation District. The district includes the historic Michigan Street Baptist Church, where the Niagara Movement, predecessor to the NAACP, began, the Colored Musicians' Club, and the Nash House, named for a civil rights pioneer.

Capital campaign ongoing; \$2 million in federal funding committed



Separate projects will increase waterfront access in the area. A one-mile, \$5 million park and trail will be built along Buffalo's harbor. Capital improvements on another section of the harbor will total \$1 million and include protected shoreline and a pedestrian trail. A sandy beach could be created at Gallagher Beach, near the harbor area, and an adjacent 80-acre boat harbor will be turned into a New York State park.

Funding secured; projects to be completed at different times throughout 2005.



A 120-acre parcel of land along the harbor, owned by the Niagara Frontier Transportation Authority, is slated for redevelopment. The NFTA expects tourism, recreational and/or housing and office projects for the site. Work has already begun to create greenspace at the site.

Three proposals have been submitted; they include a waterfront park, a live-work-play lakefront community, and a nature park. A preferred developer is expected to be announced by mid-January.

Photo Credits:

Institute
 H.H. Richardson Towers
 Buffalo Zoo
 Aquarium of Niagara
 Erie Canal Heritage Corridor
 Olmsted Parks Conservancy
 Erie Canal Harbor
 Burchfield-Penney Art Center
 Niagara Falls International Airport
 Darwin D. Martin House
 Amtrak Station
 Artspace
 Righteous Babe Records
 Graycliff
 Parkside Lodge
 Albright-Knox Art Gallery
 Waterfront Access (Erie Canal Harbor area)
 Harbor Area Development (Erie Canal Harbor area)

Buffalo Niagara Convention & Visitors Bureau
 Buffalo & Erie County Historical Society
 Buffalo & Erie County Botanical Gardens
 Buffalo Transportation Pierce-Arrow Museum
 Old Fort Niagara
 Buffalo and Erie County Naval & Military Park
 Seneca Niagara Casino
 Michigan Street Preservation Corporation
 (Michigan Street Baptist Church)

Bass Pro Shops
 Bass Pro Shops logo

BRC Imagination Arts
 Niagara Experience Center

Tony Puttnam, Project Lead Architect; Hamilton, Houston and Lownie Architects
 Frank Lloyd Wright Boathouse (rendering)

Lauer=Manguso & Associates Architects
 Buffalo Filling Station by Frank Lloyd Wright (rendering)

Landmark Society of the Niagara Frontier
 Warren and Polly Hull House



APPENDIX B

CULTURAL TOURISM AND RELATED FUNDING

SOURCE	FUNDING DISTRIBUTION
 <p>Erie County Bed Tax</p>	<p>Approximately half of Erie County's 5% bed tax goes to the Buffalo Niagara Convention & Visitors Bureau, which derives 85% of its budget from the bed tax and receives additional program-related revenue from Erie County's Public Benefit Fund and the Regionalism and Economic Development Fund. The bed tax generates about \$5 million annually.</p>
 <p>City of Buffalo</p>	<p>Due to the economic effects of the September 11, 2001 terrorist attacks, the City of Buffalo froze all funding to arts and cultural organizations in late 2001. This resulted in a total loss of approximately \$1.3 million annually to arts and cultural organizations. Buffalo does fund two public art programs:</p> <p>Percent of Art Program (1% of city capital budget) – an annual city bond fund that the Buffalo Arts Commission applies for the restoration of city-owned art pieces. Funding under this program was \$80,000 in 2001-02, \$60,000 in 2003-04.</p> <p>Art in Public Places – The City of Buffalo's "Art in Public Places" ordinance requires 1% of the budget of capital improvement projects costing \$1 million or more to be set aside for the design, construction, repair and maintenance of public works of art. In 2003 \$70,000 was funded for art under this program.</p>
 <p>Arts Council in Buffalo & Erie County</p>	<p>In 2002 the Arts Council re-granted to local arts organizations more than \$250,000 in funds primarily from Erie County and the New York State Council on the Arts.</p>
 <p>Corporate and Individual Sponsors</p>	<p>Major corporate sponsors in the Buffalo Niagara region include M&T Bank, HSBC Bank, the law firms of Phillips, Lytle, Hitchcock, Blaine & Huber, LLP, and Hodgson Russ LLP, <i>The Buffalo News</i>, Key Bank, The Western New York Public Broadcasting Association, Righteous Babe Records, Inc., JP Morgan Chase, Blue Cross/Blue Shield of Western New York, WKBW TV/Channel 7 and many others.</p>
 <p>New York State Council on the Arts (NYSCA)</p>	<p>In 2003 NYSCA provided \$1.7 million in grant dollars to arts and cultural organizations in Erie County, including re-grant dollars to the Arts Council in Buffalo & Erie County. Approximately two-thirds of this total was for operational support; 10% went toward education; 10% was re-granted and the balance was for special initiatives.</p>
 <p>National Endowment for the Arts</p>	<p>The NEA provided a total of \$285,000 in grants to 10 various arts and cultural organizations in Erie County in 2003.</p>
 <p>Local Municipalities</p>	<p>Town of West Seneca – in 2002 the Town provided \$32,000 to the Burchfield Nature Center, personnel for the West Seneca Youth Theatre (at a cost of \$14,000), and \$10,000 to its Historical Society. The Town of Aurora appropriated in 2003 \$13,000 to arrange Celebrations, a town-sponsored special events program, \$2,600 for arts/cultural/dance activities, and \$500 for its Historical Society. The Village of East Aurora provides operational services to local museums.</p>

CULTURAL TOURISM AND RELATED FUNDING
ERIE COUNTY SOURCES





APPENDIX B

CULTURAL TOURISM AND RELATED FUNDING

CULTURAL TOURISM AND RELATED FUNDING NIAGARA COUNTY SOURCES



SOURCE	FUNDING DISTRIBUTION
 <p>Niagara County Bed Tax</p>	<p>The 4% bed tax in Niagara County generated about \$1 million in 2003. The tax revenues are directed to the Niagara Tourism and Convention Corporation.</p>
 <p>County of Niagara</p>	<p>In 2002 most nonprofit cultural agencies that received funding from Niagara County were cut out of the budget. Funding for these agencies was discontinued again in 2003.</p> <p>The Niagara County Environmental Fund, which is funded with Love Canal settlement funds, has provided support to the Buffalo Audubon Society, primarily for capital expenditures.</p>
 <p>New York State Council on the Arts (NYSCA)</p>	<p>In 2003 NYSCA granted a total of \$279,490 to nine different arts and cultural organizations in Niagara County, including \$46,500 in re-grant dollars.</p>
 <p>National Endowment for the Arts</p>	<p>No arts and cultural organizations in Niagara County received NEA grants in 2003.</p>
 <p>Local Municipalities</p>	<p>In 2003 the Town of Lewiston provided \$63,000 to the Council on the Arts.</p>



APPENDIX B

CULTURAL TOURISM AND RELATED FUNDING

SUMMARY OF ERIE COUNTY ARTS & CULTURE FUNDING

YEAR: 2003

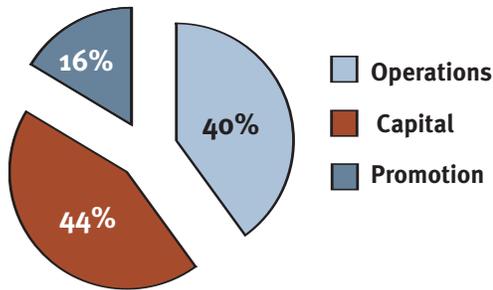
Erie County Fund	Operations	Capital	Promotion	Total	% Total (By Source of Funding)
Cultural - (ECCRAB - Erie County Cultural Resources Advisory Board - Advises)	\$5,631,423	\$0	\$0	\$5,631,423	28%
Public Benefit	\$173,450	\$450,970	\$2,844,580	\$3,469,000	17%
Extraordinary Aid to Local Governments	\$1,625,000	\$0	\$0	\$1,625,000	8%
Environment & Planning Department	\$0	\$0	\$60,000	\$60,000	0%
Capital Projects	\$0	\$5,000,000	\$0	\$5,000,000	25%
Regionalism/Economic Development Fund	\$101,310	\$18,420	\$340,770	\$460,500	2%
Legislative Initiative	\$203,546	\$0	\$4,154	\$207,700	1%
Tobacco Proceeds	\$270,000	\$3,250,000	\$0	\$3,520,000	18%
TOTAL	\$8,004,729	\$8,719,390	\$3,249,504	\$19,973,623	100%
% TOTAL (By Application of Funding)	40%	44%	16%	100%	

APPLICATION OF ERIE COUNTY ARTS & CULTURE FUNDING

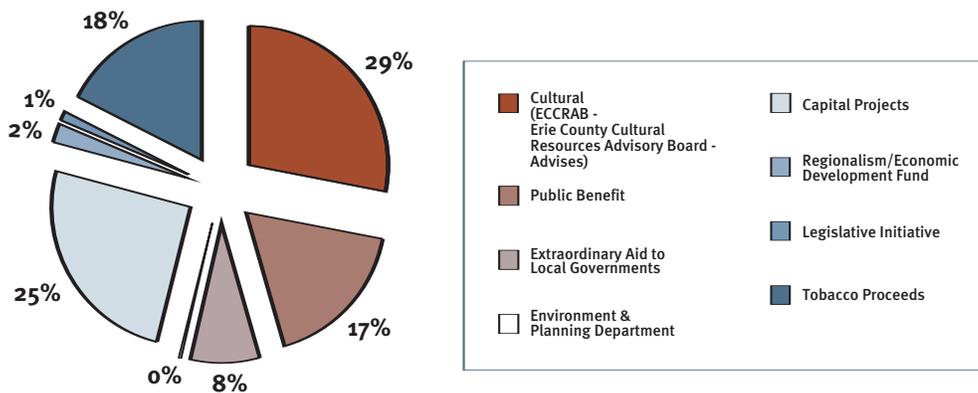
YEAR: 2003

Erie County Fund	Operations	Capital	Promotion
Cultural (ECCRAB Advises)	100%	0%	0%
Public Benefit	5%	13%	82%
Extraordinary Aid to Local Governments	100%	0%	0%
Environment & Planning Department	0%	0%	100%
Capital Projects	0%	100%	0%
Regionalism/Economic Development Fund	22%	4%	74%
Legislative Initiative	98%	0%	2%
Tobacco Proceeds	8%	92%	0%

ERIE COUNTY FUNDING BY TYPE OF SUPPORT, 2003



ERIE COUNTY FUNDING BY SOURCE OF SUPPORT, 2003





APPENDIX B

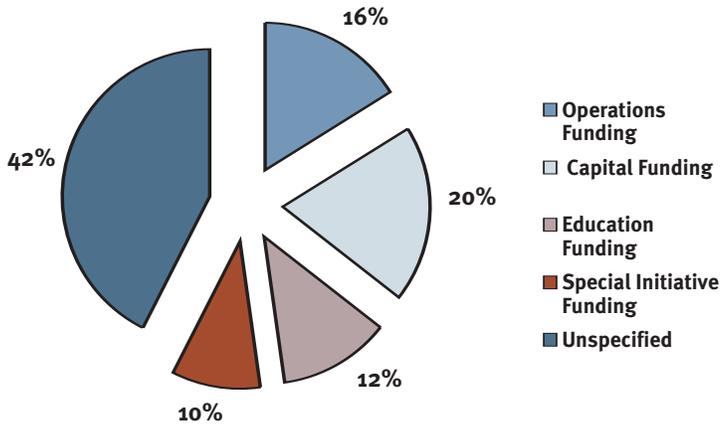
CULTURAL TOURISM AND RELATED FUNDING

SNAPSHOT OF FOUNDATION ARTS & CULTURAL FUNDING

***Figures for each foundation are from their latest IRS Form 990, as available on www.guidestar.org, an online, nonprofit database. Figures represent awards made for the referenced year; entire awards may be disbursed over several years. Also note, most foundations have committed to awards but have not yet disbursed them and thus they are not represented here.

Foundation	Operations Funding	Capital Funding	Education Funding	Special Initiative Funding	Unspecified	Total
The John R. Oishei Foundation, 2002	\$337,000	\$550,000	\$71,155	\$162,374	\$0	\$1,120,529
The Margaret L. Wendt Foundation, 2003	\$231,300	\$146,900	\$10,000	\$143,250	\$0	\$531,450
M&T Bank, 2002	\$0	\$0	\$0	\$0	\$939,175	\$939,175
HSBC Bank Foundation, 2002	\$0	\$0	\$0	\$0	\$25,000	\$25,000
Community Foundation, Inc., 2002	\$0	\$0	\$0	\$0	\$249,622	\$249,622
Community Foundation for Greater Buffalo, 2002	\$0	\$0	\$0	\$0	\$294,030	\$294,030
Independent Health, 2003	\$0	\$0	\$0	\$40,000	\$0	\$40,000
Statler Foundation, 2002	\$0	\$0	\$354,166	\$0	\$0	\$354,166
TOTAL	\$568,300	\$696,900	\$435,321	\$345,624	\$1,507,827	\$3,553,972
% TOTAL	16%	20%	12%	10%	42%	100%

FOUNDATION FUNDING BY TYPE OF SUPPORT





APPENDIX C

DEVELOPING A BUSINESS PLAN

A business plan is needed to convince potential investors – in this case public and philanthropic funders – that the strategy is viable. Effective business plans provide a blueprint for implementation, lend themselves to adaptation and remain useful through several activity cycles, essentially serving as a detailed work program for the organization.

The following are hallmarks of effective tourism development business plans, and could serve as guidelines as the entity develops its own business plan.

Business plans...

...help an entity plan activities, manage resources, assess progress, attract support and guide staff decisions;

...describe the entity's organization, governance structure and human resource plans;

...include an overview of the entity's approach, key implementation strategies, assessment protocols and expected results;

...provide a request and explanation for funding, financial analyses, pro forma estimates of expenses and anticipated economic impacts.

CULTURAL TOURISM

DEVELOPING A BUSINESS PLAN





APPENDIX D

MEASURING PERFORMANCE

CULTURAL TOURISM MEASURING PERFORMANCE



One of the keys to *A Cultural Tourism Strategy's* success will be identifying, deploying and maintaining tools to measure its effectiveness in expanding cultural tourism's contribution to the Buffalo Niagara economy. The entity will need to work with the cultural tourism community to design specific measures that:

- Rely on stable data that are easy to collect and remain consistent over time;
- Account for known data problems inherent in measuring tourism activity, particularly distinguishing between impacts attributable to residents and visitors within industries that serve both;
- Accommodate data differences across collection unit boundaries (e.g., jurisdictional, industrial and census classifications, etc.);
- Meld quantitative and qualitative analysis, particularly for capacity building, communication and visitor experience satisfaction;
- Model such measures on efforts that track tourism activity on a larger scale, in effect to facilitate comparisons to another index.

While other countries - particularly Canada and Scotland - have used standardized techniques for measuring tourism for years, and the World Tourism Organization has long-established protocols, the U.S. industry has relied on a variety of methodologies:

- **Indices:** A tool that observes quantifiable changes in business activity relative to a baseline measure. Indices can help measure and compare regional tourist activity, measure tourist spending in terms of a constant value and assist in setting standards for planning.
- **Annual surveys:** Whether of visitors, venues or hospitality businesses, these surveys help to assess current activity and success. They should be repeated regularly to facilitate comparisons over time.
- **Economic impact evaluations:** In measuring direct and indirect economic effects of visitor activity, these evaluations help quantify the economic leverage of cultural tourism.



APPENDIX D

MEASURING PERFORMANCE

PERFORMANCE MEASUREMENT FOR CULTURAL TOURISM OVERSIGHT & ADVISORY COUNCIL
& CULTURAL TOURISM WORKING GROUP

Cultural Tourism Asset Development

Goals:

Measures of success of these asset development efforts for the first three years of implementation of *A Cultural Tourism Strategy* are guided by the goals of:

- 1) strengthening and building cultural capacity to sustain operations and serve audiences, and
- 2) preparing cultural, arts and heritage organizations for tourism receptiveness.

Three-Year Objectives and Outcomes:

Throughout the three-year test phase of the cultural tourism implementation structure, specific objectives will guide the Oversight and Advisory Council and the Tourism Working Group toward meeting its two-pronged goals.

Year One:

- Analyze key cultural, arts and heritage groups' strengths and weaknesses according to characteristics of a healthy organization:
 - Resilient to systemic change while maintaining focus on mission;
 - Funded by multiple, diverse sources of income and revenues;
 - Active, organized board;
 - Guided by strategic plan;
 - Visitor ready in terms of infrastructure, services, experience;
 - Able to measure quality of experience;
 - Commitment to constant improvement;
 - Advances service, expands audience.
- Establish benchmarks for system-wide and organizational asset development (attendance, budget, financial strength, membership, customer/audience experience, visitor readiness);
- Determine priorities in terms of key organizations and benchmarks;
- Establish programs and strategies for reaching benchmarks.

Year Two:

- Implement program;
- Measure participation;
- Evaluate customer experiences, service advances toward specific benchmarks as outlined in Year One.

Year Three:

- Continue work of Year Two;
- Report back accomplishments (funders, public, news media);
- Determine new directions.

Cultural Tourism Marketing

Many in the region's cultural, arts, heritage and tourism sectors have strong ideas about the characteristics of Buffalo Niagara's cultural tourism market. But for the most part the region lacks up-to-date and compelling data and analysis on existing and potential markets. Certainly a market analysis needs to be one of the implementation structure's first orders of business.

Such an analysis should generally review the region's overall tourism market as well as provide detailed pictures of each market segment in terms of projected growth rates and member characteristics such as demographics and spending patterns. It should also define the susceptibility of market segments to seasonal or cyclical trends, decision-influencers (publications, the Internet, radio/television broadcasts) and decision-making patterns.

The analysis should also evaluate competitor destinations, especially those with offerings similar to those of Buffalo Niagara. The experience of other destinations can serve as a substitute for concept and market testing.

Part of this work entails assessing current market saturation for the concept of cultural tourism. Another aspect entails assessing innovations such as web-based ticketing and cultural tourism websites that have been developed in other regions.

Finally, the analysis should include an evaluation of organizations and institutions doing business in Buffalo Niagara with complementary or competing missions.

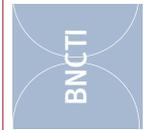




APPENDIX E

Regional Asset Development Coordinator – Job Description

CULTURAL TOURISM REGIONAL ASSET DEVELOPMENT COORDINATOR – JOB DESCRIPTION



Reports to:

Chair, Cultural Tourism Oversight & Advisory Council.

The coordinator position is envisioned as fully mobile. The coordinator would work out of several locations throughout Erie and Niagara counties.

Purpose and Scope

The coordinator works with arts agencies throughout the Buffalo Niagara region to:

- Assist with the organizational assessment process to identify strengths and weaknesses;
- Provide resource materials;
- Evaluate need for external training and/or consulting for both staff and board;
- Assist organizations to engage an appropriate trainer/consultant;
- Convene agencies and plan collaborative/cooperative activities in support of regional audience development and cultural tourism.

In addition to working directly with arts organizations, the coordinator also:

- Works with existing associations of arts groups to coordinate and supplement offerings;
- Works with local academic institutions (Niagara University, Buffalo State College, University at Buffalo, Canisius College, etc.) to identify areas of training need and coordinate scheduling and access;
- Works with regional marketing organizations (Buffalo Niagara Convention & Visitors Bureau, Niagara Tourism and Convention Corporation, Binational Tourism Alliance, Buffalo Niagara Enterprise, etc.) to identify and develop coordinated packages of cultural offerings;
- Works with emerging regional initiatives such as the Niagara Experience Center.

In the initial phase of work, the coordinator will also convene executive directors of regional arts agencies to explore the formation of a formal "Arts Agencies Executives Association," modeled on the successful AEA of the United Way of Buffalo & Erie County. The AEA has initiated two other successful

ventures that should be explored by arts agencies: the CEO Institute, which provides self-determined advanced support for executive directors, and Community Connect, a coalition of agencies focused on technology advancement, training, and support. The coordinator (and/or staff) would provide ongoing support to any of these endeavors that are undertaken.

This Asset Development model will be based on the model of the Not-for-Profit Resource Center of the United Way of Buffalo & Erie County which assists such organizations in providing programs and services by becoming a stronger organization. Indeed, the center asserts that the most effective programs in the not-for-profit sector are sustained by strong organizations, and strong organizations display a willingness and ability to continuously learn, to improve and to adapt to change. It is the center's mission to optimize the effectiveness of these not-for-profits by making them stronger organizations.

The center also acts as a resource clearinghouse, identifying the needs of an agency in the target market and then matching the appropriate community resource best able to meet those needs. The focus is placed on channeling expert resources to human service agencies seeking to strengthen one or more of the following critical organizational capabilities:

- Business and strategic planning;
- Leadership and performance enhancement;
- Organizational and resource development;
- Collaborative strategies.

See *Appendix D* for more information on specific goals, objectives, expected outcomes, and duties as they relate to asset development for cultural tourism.

