

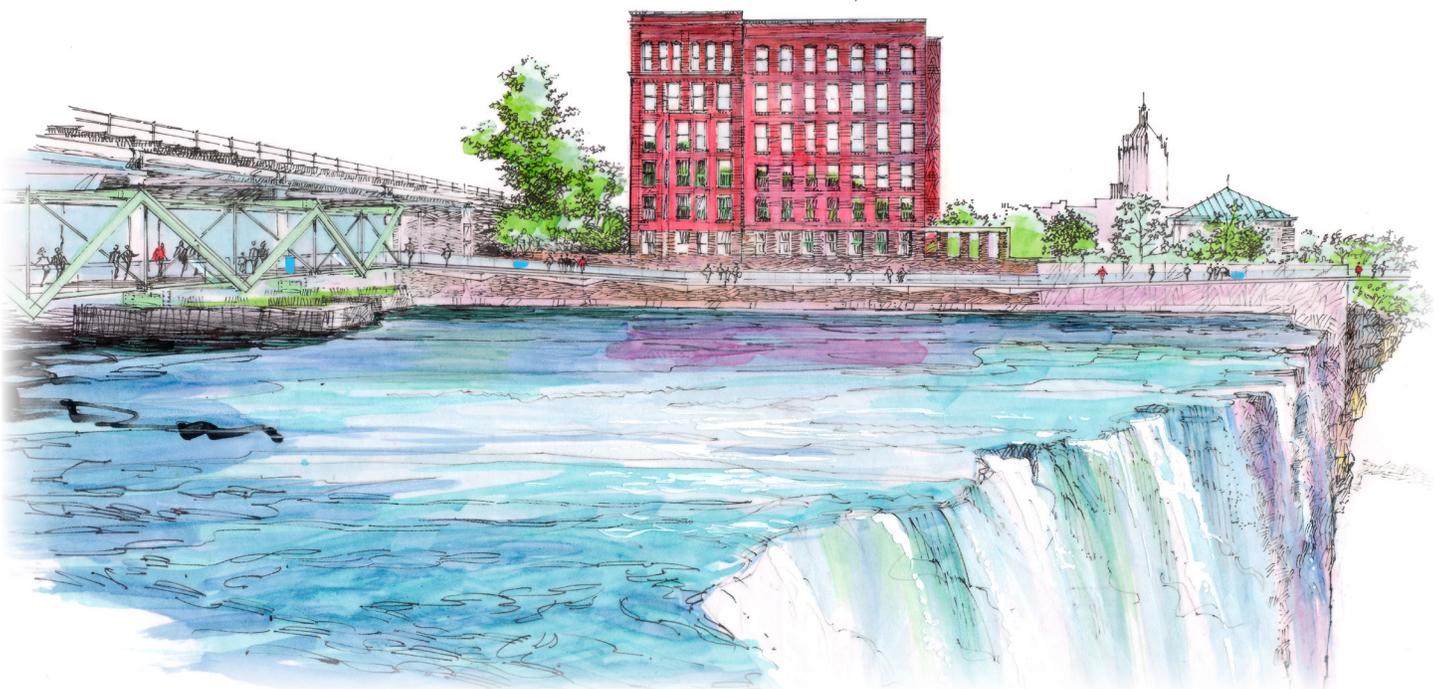
ACKNOWLEDGMENTS

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A very special thanks is due to Kent Gardner at the Center for Governmental Research Inc. for his initial recommendations and guidance during the preparation of this report, and lastly to Kathleen Holt, for her conscientious reading of our drafts, constructive advice, and patience throughout.

INTRODUCTION

The GardenAerial is a multi-phased construction project in the heart of downtown Rochester, NY that will restore public access to the High Falls Gorge on the Genesee River. Already underway, the GardenAerial is transforming this historically industrial site into a sustainable destination to feature the stunning natural beauty of the High Falls. Streetscapes redeveloped with green infrastructure, additional public green-spaces, an integrated trail network, and a viewing bridge directly over the falls are among the planned initiatives. The High Falls Gorge is a world-class site - with the growing momentum of the GardenAerial it has the potential to renew interest in downtown Rochester as a place to live, enhance quality of life for Monroe County residents, and attract visitors from outside the state.



EXECUTIVE SUMMARY

The GardenAerial will have significant economic and fiscal impacts as a result of initial construction, subsequent utilization by both Monroe County residents and visitors from outside the region, and by the addition of new jobs for park operations and organization management. Construction costs are estimated to exceed \$11 million. An anticipated 60,000 travelers from outside Monroe County will visit the GardenAerial each year, directly spending an average of \$3.9 million annually, and so creating a total economic impact of \$5.9 million on the greater Rochester area. This new injection of wealth into the local economy will provide an additional \$300,000 in tax revenue to Monroe County, and \$300,000 in similar revenue to New York State.

In addition to the outside dollars brought in by extra-regional visitors, visitation and spending by Monroe County residents will also have a powerful effect. 140,000 Monroe County residents are projected to frequent the site each year, resulting in an additional \$4.3 million in direct spending. This spending will have a total economic impact of \$6.5 million on the local economy and will provide approximately \$350,000 in combined tax revenue to the county and state. The maintenance and operation of the GardenAerial programmatic elements would originate 30 employment positions directly, to be followed by a wave of considerable indirect employment creation.



THE GARDENAERIAL: IN DETAIL

The contemporary interest in phenomena like rain gardens, green roofs, and urban forests reflect not only an increasingly sophisticated approach towards ecologically sensitive development, but also a deep appreciation on an aesthetic level for the juxtaposition of 'wild' nature with the very human mark of highly designed architecture. In this sense, urban waterfalls present a unique development opportunity by providing natural beauty and habitat within the dense urban fabric of multi-use buildings and infrastructural systems. Urban waterfalls indicate then a strong potential for visitor interest, successful visitor access, and the prospect to leverage adjacent commercial, residential, and public venues.



THE GARDENAERIAL: IN DETAIL

Phase I

Currently under construction, phase I creates and prepares new trails and gardens on both the East and West sides of the gorge. Trail improvements on the East side (near Genesee Brewery) as well as the initial construction work on the FlourGarden (at Brown's Race) began in the spring of 2014. Pedestrian access and structural feasibility studies will also take place in 2014 to prepare assets and circulation pathways for the next phase.



GARDENAERIAL : BROWNS RACE GARDEN
ROCHESTER, NY

SCHEMATIC PLAN

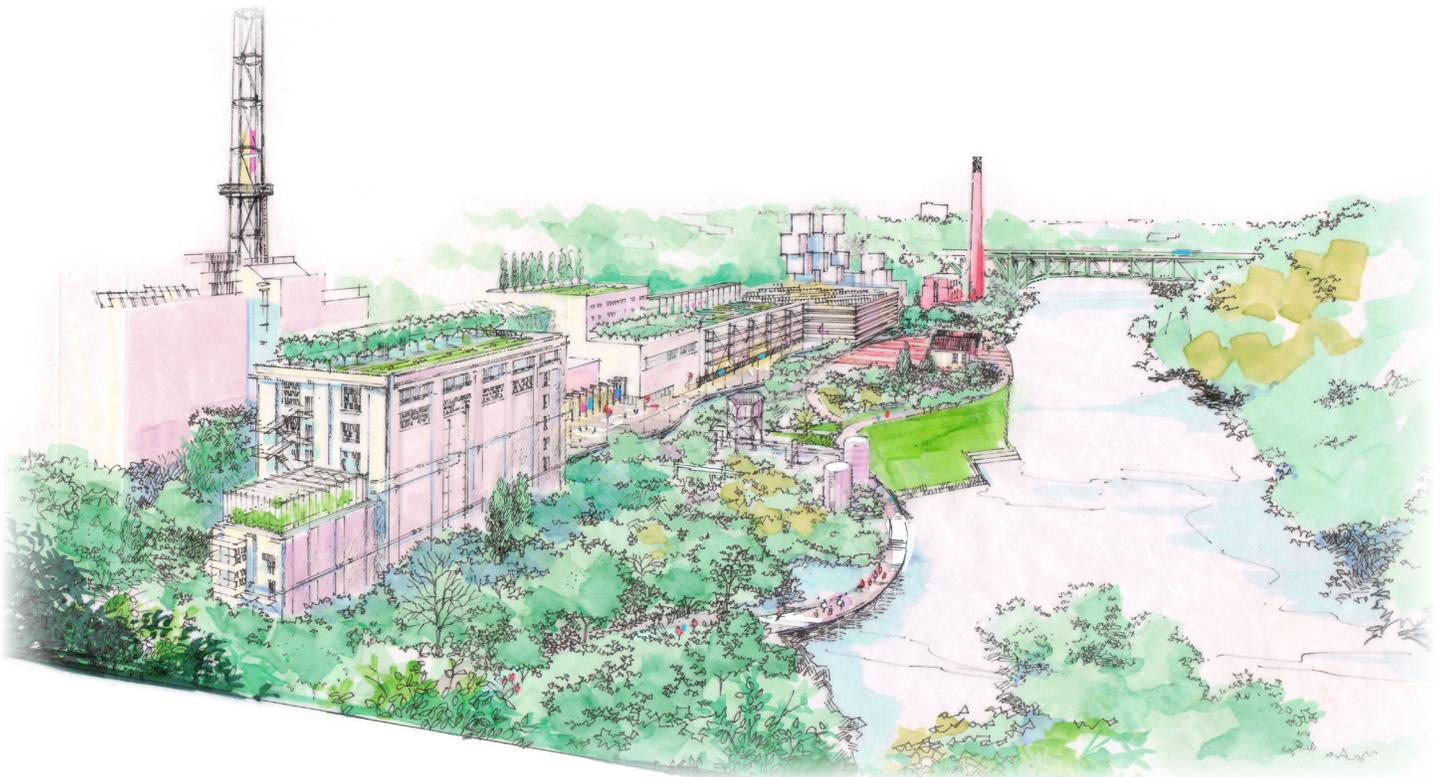
10/14/2013
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THE GARDENAERIAL: IN DETAIL

Phase 2

This includes the design and construction of a new pedestrian bridge across the top of High Falls, and a downtown connection system — thus completing a 3/4 mile 'hub' trail around the rim of the gorge. It also incorporates the possible reprogramming and re-adaption of HydroPower Station #4, the oldest extant hydroelectric station in the City of Rochester. These architectural additions to High Falls will finally give residents and visitors breathtakingly close access to the waterfall for the first time in over a century.



THE GARDENAERIAL: IN DETAIL

Phase 3

The final phase will see the creation of an arboretum floating high above the Genesee River, built on the existing Pont de Rennes Bridge. This striking “Garden in the Sky” will be integrated with a new urban greenway. Phase 3 also seeks to construct an environmentally-friendly public WinterGarden and Horticultural Genetic Specimen Bank on the East side of the Genesee River, as venues providing a panoramic view of the entire gorge.



THE GARDENAERIAL: IN CONTEXT

Transportation Infrastructure

To a large extent, adjacency to existing transportation networks will determine access to a given site, and its ability to successfully draw visitors. On that basis the GardenAerial is ideally positioned with robust potential to attract and absorb large volumes of people through a well-diversified network of transportation infrastructure.

The High Falls Gorge sits in the very center of downtown Rochester, easily reached by drivers and pedestrians alike along the city's roads. Rochester's Inner Loop is also a stone's throw away, connecting drivers within minutes to the Interstate 490 Highway which transverses Monroe County. In addition to the adjacent highway system, out-of-town visitors have a number of convenient options for reaching the GardenAerial. About 4 miles away, the Greater Rochester International Airport poses a quick 10-minute drive to the site, while both the Rochester Amtrak Station and Central Bus Station are within a 5 minute stroll.

Recreational walkers, runners, and bicyclists will find the GardenAerial just as easily accessible. High Falls is already one of the stops along the 18-mile Genesee River Trail, an off-road path which connects Lake Ontario in the North to the Erie Canal Heritage Trail in the South. The Erie Canal Trail spans the greater part of New York State and accommodates close to 1 million recreational users annually. Bicyclists along this trail can reach the High Falls Gorge in a 15-25 minute ride, just under 4 miles. In addition to these larger paths, City of Rochester residents can utilize close neighborhood trails like El Camino Trail, Butterhole Trail, and the anticipated JOSANA Trail.



THE GARDENAERIAL: IN CONTEXT

The GardenAerial in the center of downtown Rochester, shown with key transportation networks.

Genesee River Trail

GardenAerial Initiatives

JOSANA Trail

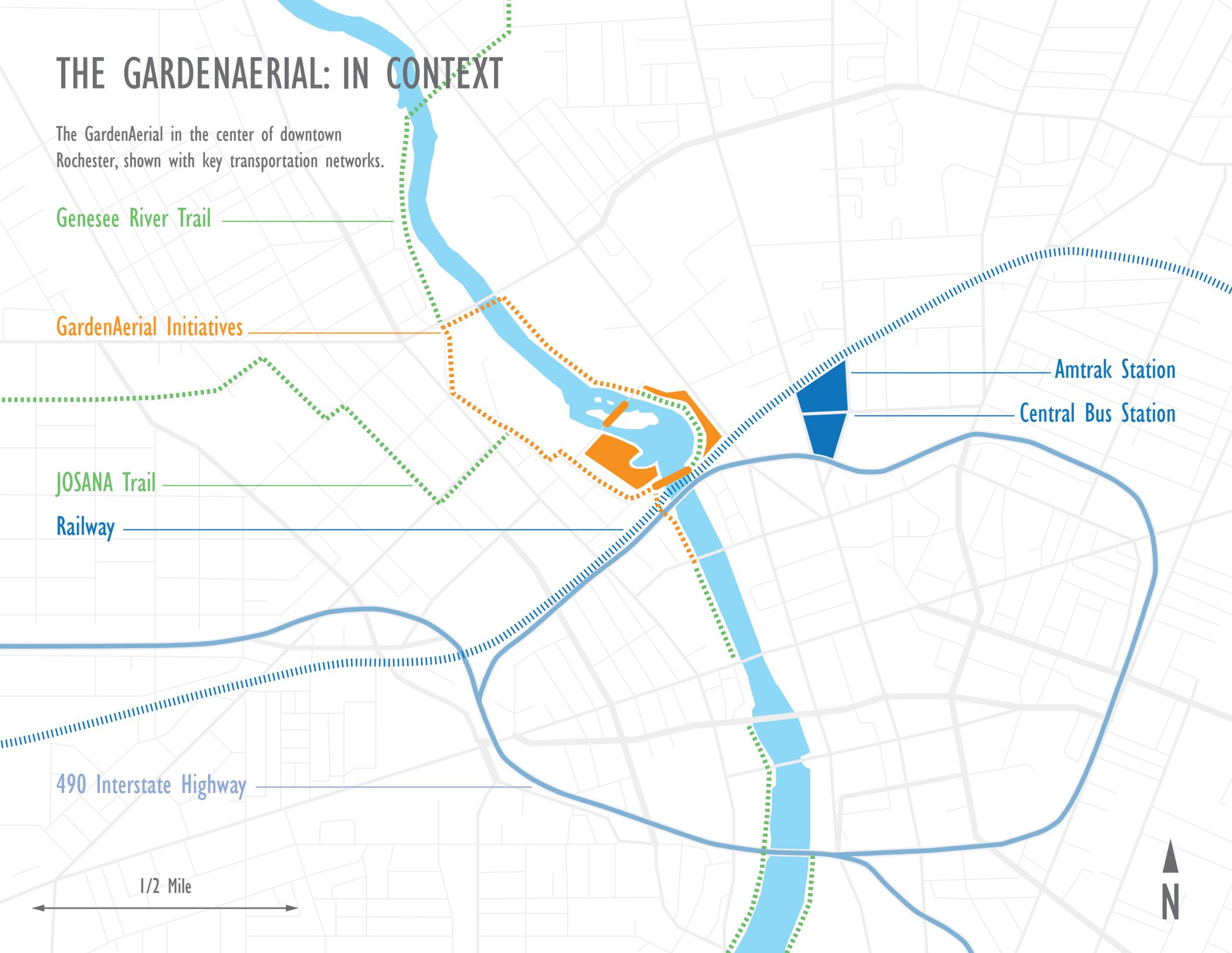
Railway

490 Interstate Highway

Amtrak Station

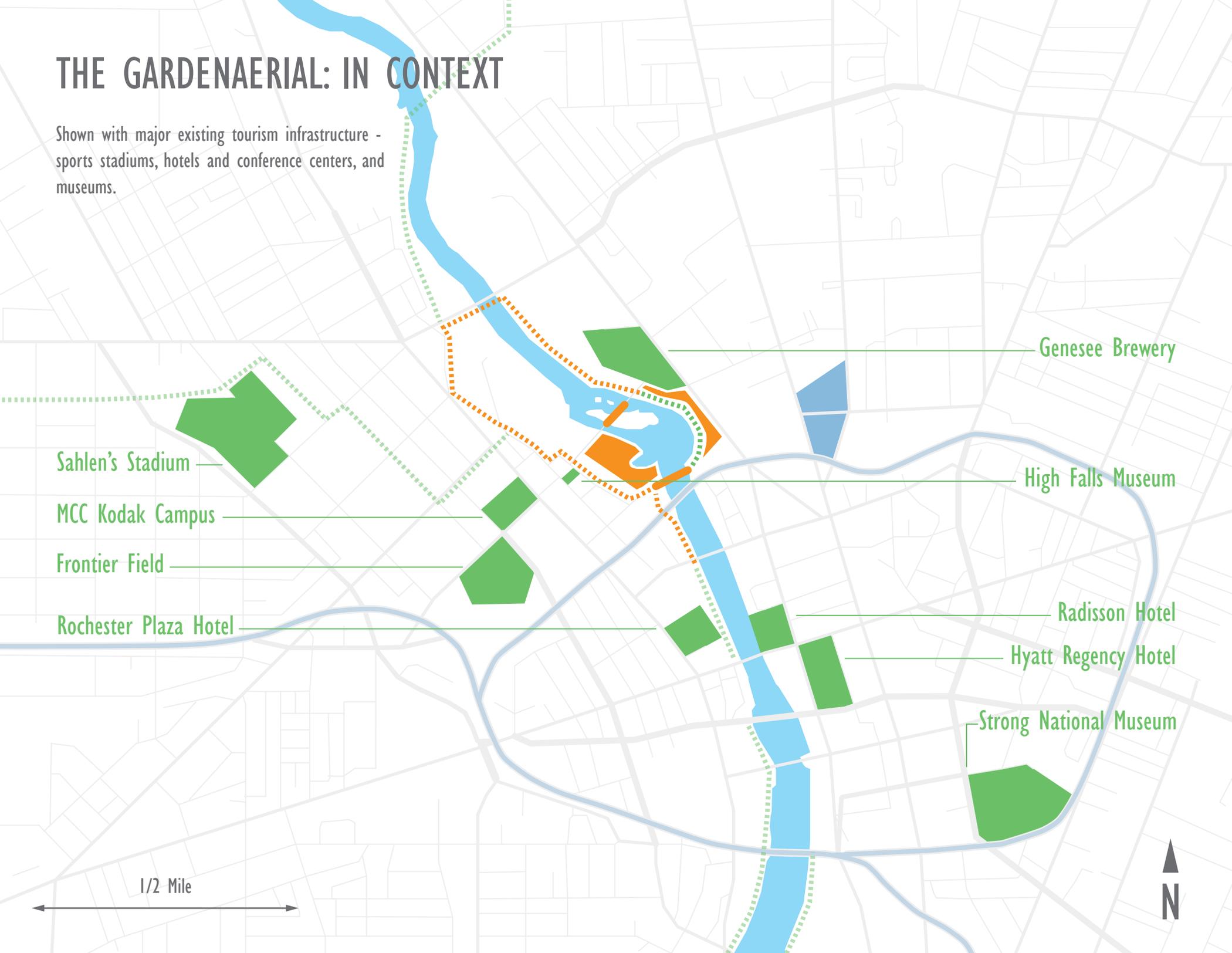
Central Bus Station

1/2 Mile



THE GARDENAERIAL: IN CONTEXT

Shown with major existing tourism infrastructure - sports stadiums, hotels and conference centers, and museums.



Sahlen's Stadium

MCC Kodak Campus

Frontier Field

Rochester Plaza Hotel

Genesee Brewery

High Falls Museum

Radisson Hotel

Hyatt Regency Hotel

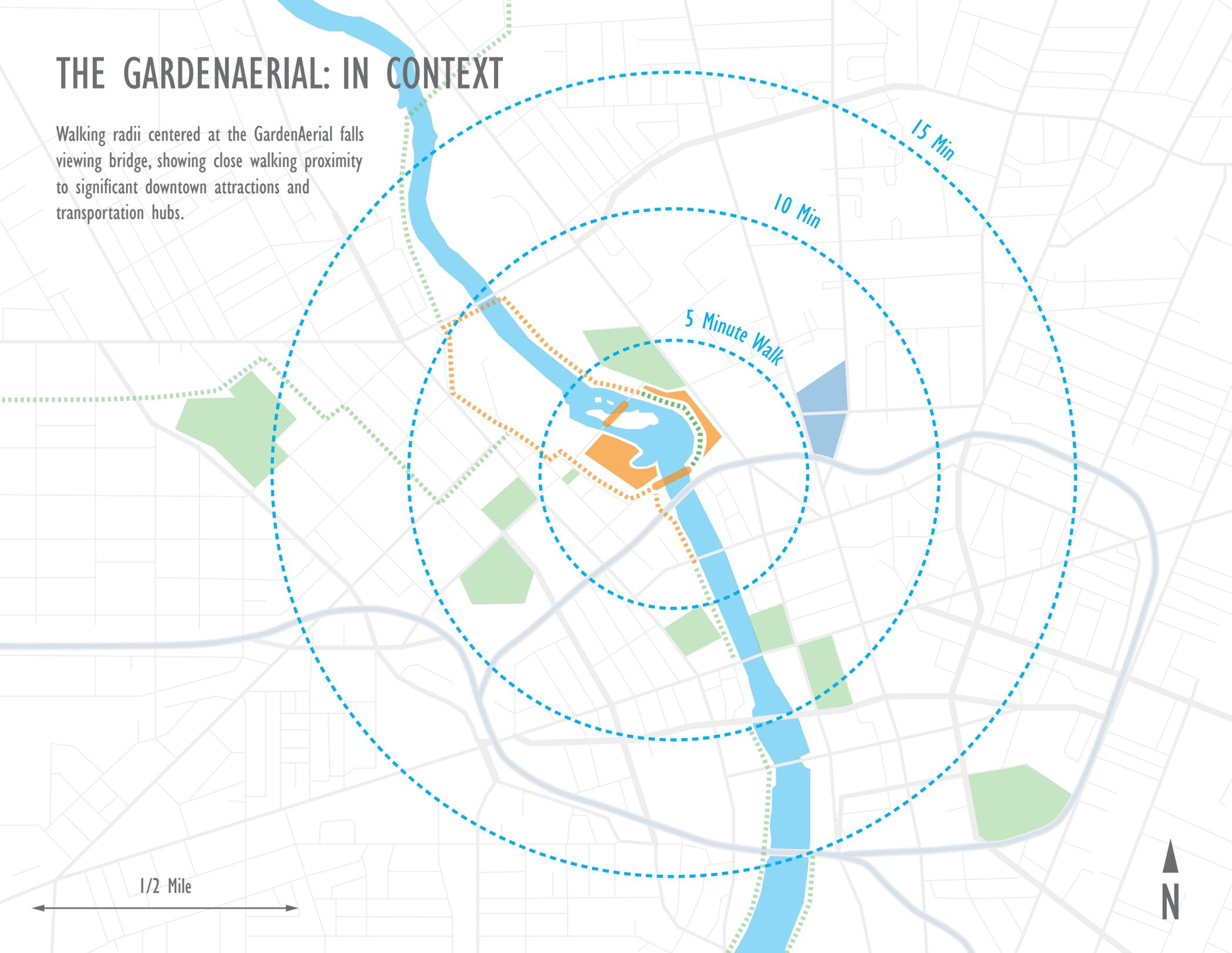
Strong National Museum

1/2 Mile

N

THE GARDENAERIAL: IN CONTEXT

Walking radii centered at the GardenAerial falls viewing bridge, showing close walking proximity to significant downtown attractions and transportation hubs.



THE GARDENAERIAL: IN CONTEXT

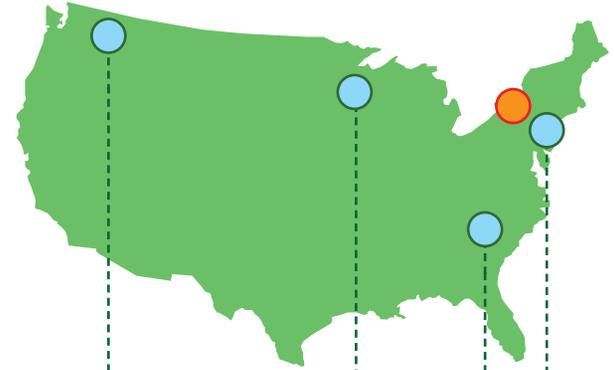
Comparable Sites

Along with examining adjacent infrastructure, comparing the High Falls Gorge to similar regional and national sites allows a deeper understanding for the value of the GardenAerial's programmatic elements and also provides another means of estimating future interest and visitation to the planned attractions.



THE GARDENAERIAL: IN CONTEXT

When looked at in the context of urban waterfalls across the entire US, High Falls emerges as a truly unique, world-class site. It is one of only a handful of comparably-sized waterfalls located within the limits of a dense metropolis. Despite having smaller or dammed falls, the case-studies shown below have still taken advantage of their development potential in the form of adjacent parks, greenways, trails, and US National Register of Historic Places designation. For example, Greenville SC boasts the 345' cantilevered 'Liberty Bridge' for viewing, while Spokane operates a cable-car tour through the neighborhood and over their falls. The already popular Great Falls in Paterson NJ is currently seeking State Park designation.



Spokane, WA (1,900 mi. from High Falls)

Minneapolis, MN (790 mi.)

Greenville, SC (820 mi.)

Paterson, NJ (300 mi.)

SPOKANE FALLS

SAINT ANTHONY FALLS

REEDY RIVER FALLS

GREAT FALLS (PASSAIC)



DAMMED

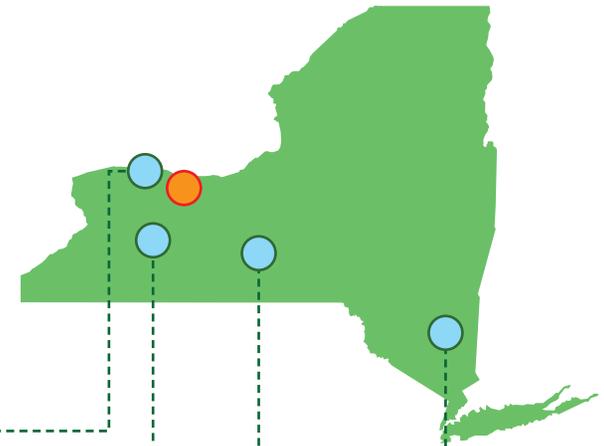
DAMMED

28' CASCADE

77' CATARACT

THE GARDENAERIAL: IN CONTEXT

With a 96' drop, High Falls is among the largest year-round flowing plunge waterfalls in New York, a state that already boasts hundreds of falls. With the exception of Niagara Falls, these waterfalls are located predominantly in parks, preserves, and rural areas - not amidst dense urban development. The 215' Taughannock Falls in the Finger Lakes and the several falls in Letchworth State Park (the largest at 107') are the most germane comparisons. Combined, these latter two sites host over 1 million visitors annually, indicating not only successful attendance for the GardenAerial but also an opportunity to accommodate regional tourists in a more coordinated manner. The GardenAerial could be one of several stops on a defined 'Upstate NY Waterfall Trail', along with the major waterfalls of the Adirondacks, the Finger Lakes, and Niagara Falls.



Monroe County (30 mi. from High Falls)

HAMLIN BEACH



▼ = 25,000 VISITORS



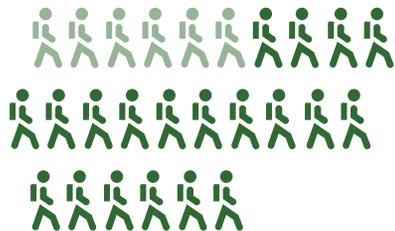
265,300 TOTAL VISITORS

Livingston / Wyoming Counties (60 mi.)

LETCHWORTH



107' BLOCK



654,171

Tompkins County (80 mi.)

TAUGHANNOCK FALLS



215' CATARACT



436,096

Dutchess / Ulster Counties (300 mi.)

WALKWAY OVER THE HUDSON



= LOCAL = NON-LOCAL



435,879

ASSESSMENT METHODOLOGY

In projecting the full economic impact of the GardenAerial, key factors include construction costs and participating firms, future visitor attendance and direct spending, jobs created through park operations, and fiscal impacts in the form of municipal tax revenue.

Construction

As part of Phase 1, the FlourGarden on Brown's Race will accrue construction costs of \$1 million. Several Rochester-area engineering and contracting organizations were consulted for estimating the building costs for Phase 2 of the GardenAerial. UNICON, an independent labor-management and advocacy group, has placed total construction costs for the new bridge over the falls and the downtown connection system at \$10 million. These projections do not take into account the cost of future initiatives such as the re-adaption of HydroPower Station #4, the WinterGarden, the Floating Arboretum, or improvements to the anticipated viewing bridge.

Visitor Attendance & Spending

To estimate future visitor attendance to the GardenAerial, numerous sites (regionally and nationally) and annual events were utilized as case studies¹. In addition to the GardenAerial's proximity to multiple transportation hubs, attendance figures were gathered from City of Rochester trails and the Erie Canal Trail. Rochester's many annual festivals were also taken into account, several of which each draw hundreds of thousands of guests. Finally, recorded attendance data from similar natural features, family attractions, and state parks in the region proved valuable not only in estimating future visitorship to the GardenAerial, but also in determining the proportion of local (residents of Monroe County) to non-local visitors². Solely considering the enhanced quality of life that the GardenAerial will bring to residents, the planned initiatives are well worth the investment. However, it is also valuable to make a distinction between local and non-local visitors, as tourists from outside the area will bring in new wealth to be circulated in the city and county economies.

As opposed to visits by residents who would make their way to the site (or some similar attraction in the county) anyway, visits and time spent by non-local travelers can be considered "net-new" visitation. Net new visitation consists of two important groups of people, the first being travelers who would not come to downtown Rochester (or Monroe County, or Western New York) otherwise if not for the added attraction of the GardenAerial. The second, and just as important group, consists of visitors already in Rochester who decide to extend their stay longer than they would have if the GardenAerial was not accessible. Anecdotal evidence and strong community support suggest that the GardenAerial will draw net new visitation, and will be attractive to the demographic that patronizes bus tours and to those interested in natural attractions like Letchworth State Park or Hamlin Beach on Lake Ontario. By adding a restored and redeveloped High Falls Gorge to Rochester's growing portfolio of attractions, tour companies may give greater consideration to spending a day in Rochester as part of a Finger Lakes Wine tour or Niagara Falls tour, to name several examples.

1 Appendix, Figure 1.

2 Figure 2.

ASSESSMENT METHODOLOGY

Visitor direct spending was estimated much in the same manner as visitor attendance - recorded data from case studies were used to calculate a range of values and reach an average. Direct spending projections are a function both of the number of visitors and the monetary amount spent on each visit. Spending-Per-Visit figures were based on the 2009 report, *The New York State Park System: An Economic Asset to the Empire State*. This study determined an average range of spending for multiple 'visit types' (local, non-local, overnight, day-trip, etc.) to New York State Park sites. These ranges were collected, adjusted for inflation, and calculated for both local and non-local visitation¹.

Economic Impact : The “Multiplier Effect”

The Multiplier Effect refers to the fact that spending will circulate in an economy multiple times after the initial (direct) transaction. For example, travelers from outside the county make the initial (direct) expenditure when they buy lunch, souvenirs, or a hotel room at a particular attraction. Consequently, the restaurants, souvenir stands, or hotels serving those travelers then make purchases from local vendors and their employees spend their wages locally, thus creating a second wave of spending, and so on. These additional waves of spending draw on various services and industries within the community, adding value at each stage. By choosing a scaling factor appropriate for the region, it then makes sense to project figures² - for example, \$3.9 million of direct tourism spending in Monroe County means a total economic impact of \$5.9 million (when the multiplier effect is taken into account).

1 Appendix, Figure 3.

2 Figure 4.

ASSESSMENT METHODOLOGY

Jobs Created

All GardenAerial proposals cover approximately 20 acres of land, a mile of recreational trail, and include a waterfall, a portion of the Genesee River, 100' gorge walls, multiple vegetated areas of varying density and species composition, an outdoor Horticultural Genetic Specimen Bank, and indoor highly-planted areas like the Wintergarden. Added to this complexity, the GardenAerial is adjacent on all sides to quintessential urbanism - high-density buildings, mixed-use neighborhoods, and heavily-trafficked infrastructural systems. These factors increase the attention and labor that must be paid to ensuring environmental compliance and preservation of the park's natural assets, as compared to if the GardenAerial were located in a more rural or undeveloped area. These circumstances have been taken into consideration while estimating the necessary labor to maintain all proposed programmatic elements. In projecting employment opportunities created by the GardenAerial, recorded data from case-studies were used¹, in addition to predicting specific tasks and jobs types necessary for the operation of the planned initiatives.

A conservative projection anticipates 10 full-time positions and 20 part-time seasonal positions created by the GardenAerial developments at High Falls. Full-time positions will include organizational management and advocacy, park administration, tour operations, security, janitorial duties, and long-term plant care for the more intensive Wintergarden and Floating Arboretum. Seasonal work would consist of additional plant installations and annual vegetation maintenance, special event planning and coordination, and environmental compliance and safety-related tasks.

The 30 positions discussed are the direct effect the GardenAerial would have on job creation - this accounts for the first round of positions immediately related to the existence and operation of the facilities proper. Though more difficult to predict, the indirect effect on job growth is no less important to the powerful economic impact the GardenAerial would have on Rochester. Indirect jobs would result from the incremental increase in visitors to the High Falls district - and so drawing on more of the available services in the neighborhood, city, and even region. As more people are attracted to the area than previously, attendance to neighborhood restaurants, bars, and other recreational venues will rise, patronage to hotels and accommodations within the city/county would increase, and the use of transportation infrastructure (roads, bus tours, gas stations) within the entire region would see more usage. As a result of this second wave of economic activity, businesses would potentially find the need to increase hours for existing employees, hire new staff, or open new locations entirely.

Other indirect effects include increased booking for conferences and convention centers (3 of which are within a 15-minute walk of the High Falls), as well as new jobs in the construction and service sectors. As new spending is introduced into the economy, a portion of the total new jobs will be created in other industries as businesses and employees spend their earnings and wages on real estate, medical care, and consumer goods.

¹ Appendix, Figure 5.

ASSESSMENT METHODOLOGY

Fiscal Impacts

New economic activity spurred by the GardenAerial will provide sources of revenue to both the county and state in the form of sales tax, income tax, occupancy tax and property tax revenues. Calculating municipal tax revenue is a function of projected visitor spending and municipal tax rates¹. On an annual basis, non-local visitor spending will result in an average of \$300k to both Monroe County and New York State in the form of sales taxes, while spending by residents will see an average combined sales tax revenue of \$350k to the county and state. Though more difficult to estimate with accuracy, positive results for income tax revenue and property tax revenue will be no less pronounced. Service employees benefiting from increases in business will contribute more in income taxes, while adjacent property taxes will rise as a result of increased valuation. The GardenAerial is also likely to spur future investment in other waterfront redevelopment activities, thus contributing to new investment, consumer spending, job creation and consequently various tax revenue streams.

¹ Appendix, Figure 6.

APPENDIX OF FIGURES

Figure 1. Relevant Destinations & Attendance Data

Destinations	Average Annual Visitor Attendance	Population
REGIONAL		
Letchworth State Park	654,171	
Taughannock Falls State Park	436,096	
Hamlin Beach State Park	265,300	
MONROE COUNTY		
	1.7 Million	747,813
CITY OF ROCHESTER		
(Downtown Rochester)	5 Million	210,532
Strong National Museum of Play	568,930	
Rochester Lilac Festival	500,000	
Corn Hill Arts Festival	200,000	
Rochester International Jazz Festival	171,800	
First Niagara Rochester Fringe Festival	41,500	
DISTRICT		
Frontier Field (Red Wings Baseball)	420,751	
Radisson Hotel Rochester Riverside	235,000	
Genesee Brew House (Brewery Tours)	200,000	
Greentopia Eco Fest	25,000	
High Falls Center & Interpretive Museum	8,000	
MCC Kodak Campus		3,000 (Students)
ADJACENT TRAILS		
El Camino (Events & Trail Usage)	1,500	
Erie Canalway Trail	1 Million	
OTHER		
Walkway Over The Hudson	700,000	

APPENDIX OF FIGURES

Figure 2. Case Studies: State Park Attendance & Related Estimates

Destination	Annual Attendance	Annual Overnight Visitors (Estimated)	Ratio of Overnight to Total Visitors
Hamlin Beach	265,300	79,131	30%
Taughannock Falls	436,096	24,204	6%
Letchworth	654,171	158,350	24%
Walkway Over The Hudson	435,879	174,351	40%

Recorded attendance figures for the years 2008-2013 were used for each state park in computing the six-year average for annual attendance (shown above). Additional records of cabin rentals, vehicle admittance, and other park facilities were then used to estimate the number of overnight visitors at each location. The average ratio of overnight to total visitors for these park locations is 25%, thus providing an average estimate for non-local attendance at attractions of this type. Assumptions include both that the majority of overnight visitors will be from outside the county in which they are visiting (non-local), and also that many day-trippers will be non-local yet unaccounted for in the records for cabin rentals and other activities which imply overnight stays.

Figure 3. Local & Non-Local Visitor Direct Spending Estimates

	Annual Users: Low Estimate	Annual Users: High Estimate	Spending per Visit: Low Est.	Spending per Visit: High Est.	Total Annual Spending: Low	Total Annual Spending: High
Local Visitors	120,000	160,000	\$19.18	\$39.49	\$2,301,600.00	\$6,318,400.00
Non-local Visitors	40,000	80,000	\$38.36	\$78.97	\$1,534,400.00	\$6,317,600.00

Released in 2009, *The New York State Park System: An Economic Asset to the Empire State* determined an average range of \$34 to \$70 for spending per non-local visit to New York State Park sites. Adjusted for inflation, the 2014 non-local spending range is then \$38.36 to \$78.97, resulting in a total annual direct spending of \$3.9 million (averaging high and low calculated estimates). Estimates for local visitor attendance and local direct spending were computed using the same methodology, providing an average total direct spending of \$4.3 million annually.

APPENDIX OF FIGURES

Figure 4. Impact of Local & Non-Local Direct Spending

	Total Direct Spending	Multiplier	Total Economic Impact
Non-local, Low Est.	\$1,534,400.00	1.5	\$2,301,600.00
Non-local, High Est.	\$6,317,600.00	1.5	\$9,476,400.00
Local, Low Est.	\$2,301,600.00	1.5	\$3,452,400.00
Local, High Est.	\$6,318,400.00	1.5	\$9,477,600.00

The specific numeric value of economic multipliers range widely, and depend on the industry under study, geographic location, and political and fiscal factors. The multiplier value of 1.5, used in this assessment, is a conservative estimate¹ given the region (Upstate New York) and the industry (Leisure and Hospitality).

Figure 5. Employee Types at New York State Parks

New York State Park	Annual	Seasonal*	Long Term Seasonal**
Letchworth	46	80	15
Hamlin Beach	7	29	3
Darien Lakes	2	16	0
Lakeside Beach	3	13	1
Average (All Parks)	15	35	5
Average (Sans Letchworth)	4	19	1
* April - October			
** Year-round with reduced winter hours			

¹ The specific multiplier used was taken from 'Employment in New York State: Understanding the Multiplier Effect', a 2005 publication provided by the State of New York Department of Labor Division of Research and Statistics.

APPENDIX OF FIGURES

Figure 6. Projected Municipal Sales Tax Revenue

	Direct Spending	Monroe County Revenue	New York State Revenue
Non-local, Low Est.	\$1,534,400.00	\$61,376.00	\$61,376.00
Non-local, High Est.	\$6,317,600.00	\$252,704.00	\$252,704.00
Local, Low Est.	\$2,301,600.00	\$92,064.00	\$92,064.00
Local, High Est.	\$6,318,400.00	\$252,736.00	\$252,736.00

Based on a 4% sales tax rate at both the county and state levels. Additional revenue predicted but not quantified includes increased property and hotel-occupancy taxes.

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