

Buffalo-Niagara Region's
Business Climate:
An Analysis of the Perceptions of
Corporate Executives

Prepared for:



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dc*i*

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Executive Summary

In December 2006, Development Counsellors International (DCI) launched a survey of corporate executives on behalf of the Buffalo-Niagara Enterprise. The study was designed to measure perceptions of the business climate of the Buffalo-Niagara region.

The questionnaire was mailed initially to 2474 executives in 6 industry sectors: life sciences, advanced manufacturing, food/food processing, logistics, information technology and banking/financial services. The geographic breakdown of targeted respondents was 60% in Canada, 30% in the United States and 10% in Europe. Those who received the survey had the option of completing it with pen on paper, or accessing it on the internet. In January 2007, reminder emails were sent to 1313 of the original target audience. Follow-up emails and phone calls sought to increase participation. The third phase of outreach was launched via email in February 2007 to reach additional respondents. All participants were offered specialty chocolate from Choco-Logo as an incentive.

One-hundred and two corporate executives completed the survey. The geographic breakdown of respondents is 81% from Canada, 7% from the United States and 12% unknown (respondents had the option of not providing their contact information.)

These 102 responses offer us valuable insight on how the Buffalo-Niagara region is seen by corporate decision-makers and will help shape a strategy to deliver BNE's message to a diverse group. The findings also provide a useful benchmark; as we increase familiarity with the Buffalo-Niagara region among this target group, we should achieve improvement in the perceptions of the region.

A copy of the questionnaire is presented in Appendix A. The following summary presents the key findings of the survey.

1. The respondents are familiar with the Buffalo-Niagara region. Eighty-five percent have visited the region. (Among those we targeted to complete the survey, it is understandable that the respondents who are most familiar with the region are the ones who choose to participate.)
2. The Buffalo-Niagara region is known for its tourist attractions, particularly Niagara Falls. It is also known for its cold weather.
3. The industries most associated with Buffalo-Niagara are **Canadian/ International business (53%)** followed by **logistics/distribution (51%)** and **hospitality/tourism (45%)**.
4. When asked to consider the region's strengths, respondents most often mentioned its **location (62%)**, followed by its **tourist attractions (31%)** and the region's **people (28%)**.
5. **Infrastructure and roads (31%)** and **cold weather (30%)**, **the economy (30%)** and **downtown areas (30%)** were mentioned most often by respondents asked to list the region's weaknesses.

6. A majority of respondents rated Buffalo-Niagara's business climate as ***on par with Pittsburgh (66%), Rochester (63%), Baltimore (53%), Richmond (53%) and Philadelphia (51%).***
7. Buffalo-Niagara's business climate was rated ***worse than Toronto (58%), Charlotte (55%), Vancouver (54%), Boston (53%), Chicago (51%) and Phoenix (50%).***
8. According to respondents, the most important factors in a site location decision are: *efficient transportation systems, business-friendly government and low overall costs.*
9. The Buffalo-Niagara region earns its highest scores for its *efficient transportation system, low occupancy and construction costs, low overall costs and cost of living.*
10. Only 36% of respondents report they have seen an ad in print about the region and 26% of respondents report they have read a story about Buffalo-Niagara or a Buffalo-Niagara-based company. **Thirty-one percent have had no exposure to the region's marketing tactics.**
11. **Forty-two percent** of respondents told us that their company is planning on relocating, expanding, consolidating or building new facilities in the next 12-26 months.

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Familiarity with Buffalo-Niagara

To gauge respondents' familiarity with the Buffalo-Niagara region, they were asked "*Have you ever been to Buffalo Niagara?*"

Eight-seven of the 102 survey respondents (85%) answered affirmatively.

When queried about the reason for their visit to the region, **53% indicated vacation and 50% indicated business.**

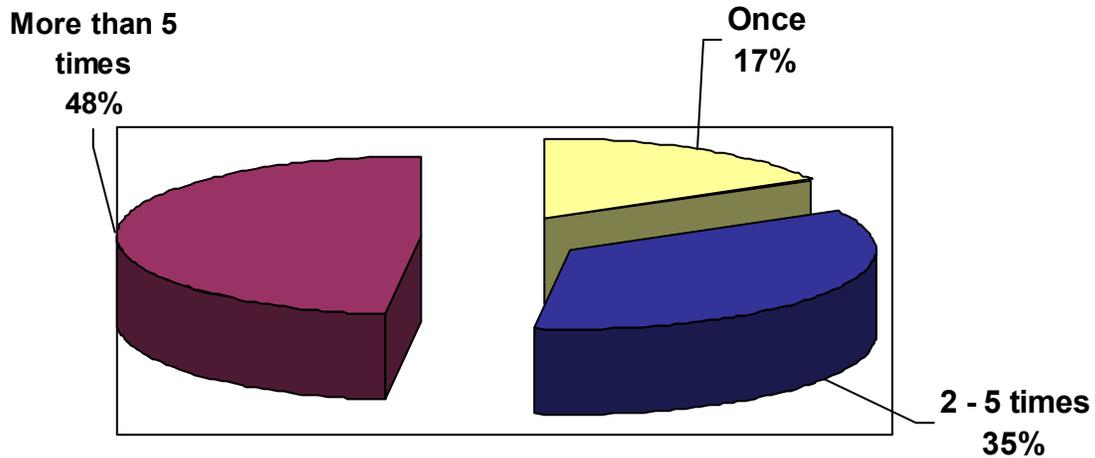
All replies are shown in the table below.

Table A: Purpose for Visiting Buffalo-Niagara (N= 87)

Purpose	% of Respondents
Vacation	53%
Business	50%
Family	20%
Other	13%
Convention	8%
Education	4%

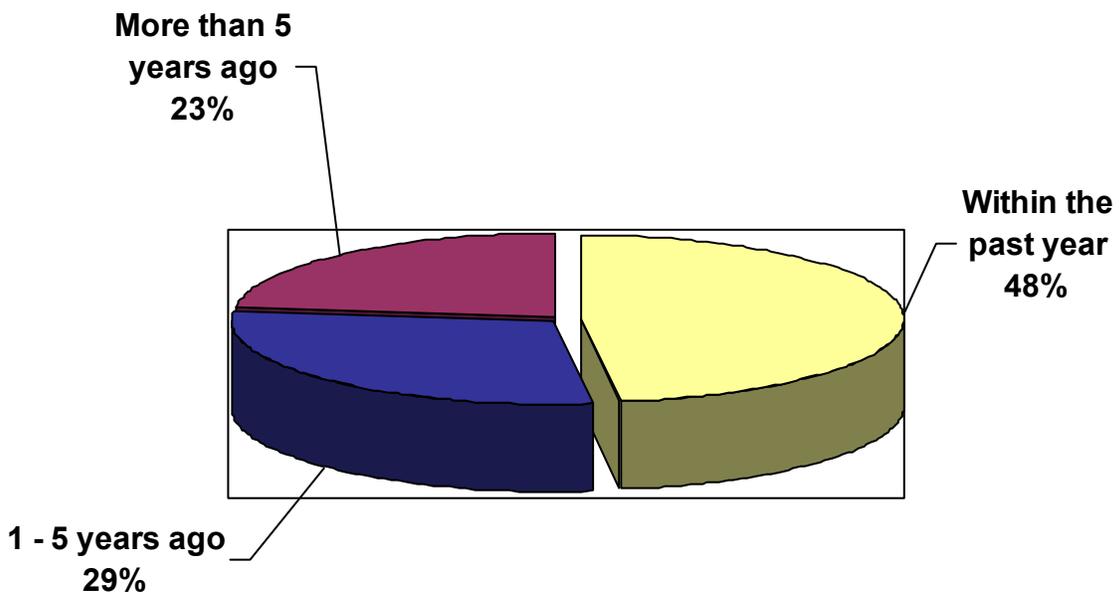
The survey also sought to learn how frequently these respondents have visited Buffalo-Niagara. The answers to the question regarding how often respondents visited are presented in the following chart.

**Chart 1: How Frequently Respondents Have Visited Buffalo-Niagara
(% of those who have visited)**



Finally, among those who have ever visited Buffalo Niagara, most (48%) reported that their last visit occurred within the past year. The replies to the question, "When was your last visit," are shown in the chart below.

**Chart 2: When Respondents have last visited Buffalo Niagara
(% of those who have visited)**



In order to get a sense of “top of mind” impressions of the Buffalo-Niagara region, respondents were asked the open-ended question, “Regardless of whether you have visited Buffalo-Niagara, what three phrases or words come to mind when you think of Buffalo-Niagara?”

Compared with the site location consultants who answered this question in a separate survey, the corporate executives are more likely to associate the Buffalo-Niagara region with its tourist attractions and Niagara Falls. Reflecting the bi-national/ international character of the CEO targets, many mentioned hockey as well as football as Buffalo’s sports. None of the U.S.-based site selection consultants mentioned hockey. The table below summarizes the responses. Appendix B presents all answers.

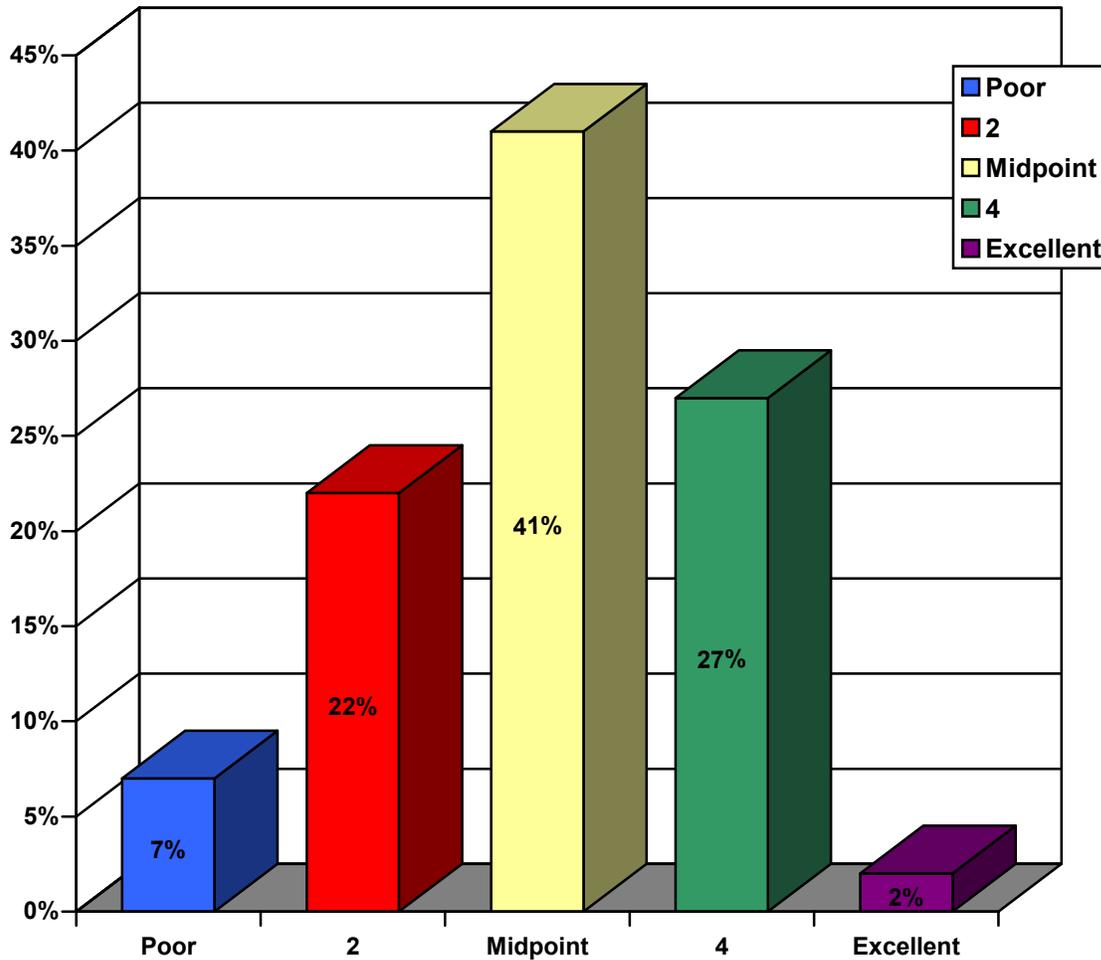
Table B: Top of Mind impressions of Buffalo Niagara (N= 98)

Answer	% of Respondents
Tourist Attraction (“wine,” “casino,” “summer vacation”)	47%
Niagara Falls (mentioned specifically, distinct from answers regarding the region as a general tourist destination)	45%
Weather (“cold,” “snow”)	24%
Old, depressed	22%
Sports (“Buffalo Bills,” “Buffalo Sabres”)	21%
Location (“New York,” “gateway to Canada,”)	18%
Nature/ Beauty of the Region	15%
Shopping (“Outlet Malls”)	14%
Industrial	8%
Business friendly (“opportunities,” “potential”)	6%
People (“friendly,” “hard working”)	6%
Infrastructure (Buffalo Airport, highways)	5%
Specific businesses located in the region (e.g. HSBC Bank, GM)	4%
Unions	3%
Quality of Life	3%

Respondents were also asked, “On a scale of one (poor) to five (excellent), what is your overall perception of Buffalo-Niagara?” Answers cluster around the midpoint with an average (mean) score of 2.95 on the five-point scale.

The chart below presents the breakdown of answers.

**Chart 3: Overall Perceptions of Buffalo-Niagara
(1 – 5 scale)**



Industries Associated with Buffalo-Niagara

Respondents were presented with a list of 10 industries and asked to check off all industries that they associate with Buffalo-Niagara. The 10 industries are:

- Advanced Manufacturing
- Banking/ Financial Services
- Canadian/ International Business
- Food/ Food Processing
- Hospitality/ Tourism
- Information Technology
- Logistics/ Distribution
- Life Sciences
- Machinery
- Transportation equipment

Selected most often with 53% of the respondents was **Canadian/ International business** followed by **logistics/distribution** (51%) and **hospitality/ tourism** (45%). The table below shows the percentage of respondents that checked off each possible industry.

Table C: Industries Associated with Buffalo-Niagara

Industry	% of Respondents
Canadian/ International business	53%
Logistics/ Distribution	51%
Hospitality/ Tourism	45%
Machinery	29%
Food/ Food Processing	24%
Transportation Equipment	24%
Banking/ Financial Services	20%
Advanced manufacturing	18%
Life Sciences	7%
Information Technology	3%

To raise the image of Buffalo-Niagara as a center for desirable industries which are not readily associated with the region, such as life sciences and information technology, the state and local authorities should take steps to encourage these industries. Special support of companies already operating in the region and outreach to companies it hopes to attract within these industries are equally important strategies.

Buffalo Niagara’s Strengths and Weaknesses

To further grasp respondents’ perceptions of Buffalo-Niagara, an open-ended question requested that respondents list the strengths and weaknesses of the region. When asked, “*Based on your impressions of Buffalo-Niagara, please indicate up to three items you consider strengths and up to three items you consider weaknesses of Buffalo-Niagara,*” respondents offered a variety of diverse replies.

The replies were coded and counted. Among the region’s strengths, location was mentioned most often (62%), followed by its tourist attractions (31%) and the region’s people (28%). The most-mentioned strengths of the region are presented in the table below. Percentages do not total 100 because respondents listed several factors that were coded into several categories.

Table D: Buffalo-Niagara’s Strengths (N = 81)

% of Respondents	Strength
62%	Location, including references to its proximity to Canada, the Midwest and New York state
31%	Tourist attractions, including Niagara Falls, casinos, shopping, and tourists themselves
28%	The people, including comments calling the population “friendly” and “strong workers”
22%	Infrastructure, including the airport, highways, and telecom.
19%	Low costs, including references to low wages, affordable cost of living, and low cost power
17%	The natural beauty of the region
7%	The economy: growing, changing, providing opportunity
6%	The industry sectors operating in the region
2%	Higher education
1%	Mild climate
1%	Quality of products made in the region

Similarly, the responses regarding Buffalo-Niagara’s weaknesses were coded and counted. A summary of responses is presented in the table below.

Table E: Buffalo-Niagara’s Weaknesses (N = 71)

% of Respondents	Weakness
31%	Infrastructure and roads, with many mentions of long border waits
30%	Weather
30%	The economy: low growth, declining industries
30%	The unattractiveness of downtown: not clean, nothing to do, “dumpy”
15%	Government, regulation, ineffective leadership
14%	Perceptions of the region
13%	Costs, particularly high taxes
11%	Presence of labor unions
10%	The decline in population and corresponding loss of job skills
8%	Big City problems, including crime and poverty
5%	Location, “out of the way,” “proximity to NYC”
3%	Other

Appendix C presents all answers provided as Buffalo-Niagara’s strengths and weaknesses.

Rating Buffalo-Niagara on Important Factors in Making a Site Location Decision

Using a scale of 1-5, where 1 equals “poor” and 5 equals “excellent,” respondents were asked to rate Buffalo-Niagara on fifteen factors which are commonly considered in site location decisions. The table below shows the mean score earned by Buffalo-Niagara for each factor, based on responses that were provided.

**Table F: Buffalo-Niagara’s Rating on
Important Factors in a Site Location Decision
(Mean score, on a scale of 1-5)**

Factor	Buffalo-Niagara’s mean score
Efficient transportation systems (highway, air, rail, port)	3.59
Low occupancy and/or construction costs	3.36
Low overall costs	3.33
Cost of living	3.33
Access to affordable personnel	3.28
Business-friendly government	3.28
Availability of good K-12 education	3.20
Overall quality of life (cultural and recreational amenities, crime rate, etc.)	3.17
Availability of managerial/professional workers	3.10
Proximity to funding sources/ financial markets	3.09
Availability of worker training programs through the local community college system	3.09
Presence of research universities	3.06
Availability of skilled workers	3.04
Competitive incentives/tax exemptions	3.02
Low overall tax burden	2.98

Using a similar scale of 1-5, where 1 equals “unimportant” and 5 equals “important,” respondents were asked to rate the fifteen factors which are commonly considered in site location decisions. The table below presents the mean score earned by each factor.

**Table G: Relative Importance of Site Location Factors in a Typical Decision
(Mean Score, on a scale of 1 – 5)**

Factor	Importance Mean Score
Efficient transportation systems (highway, air, rail, port)	4.23
Business-friendly government	4.23
Low overall costs	4.12
Availability of skilled workers	4.07
Access to affordable personnel	4.02
Low overall tax burden	4.02
Overall quality of life (cultural and recreational amenities, crime rate, etc.)	4.01
Competitive incentives/tax exemptions	3.93
Cost of Living	3.90
Availability of managerial/professional workers	3.87
Low occupancy and/or construction costs	3.82
Availability of good K-12 education	3.54
Availability of worker training programs through the local community college system	3.36
Proximity to funding sources/ financial markets	3.05
Presence of research universities	2.69

By plotting Buffalo Niagara's score on each factor with the importance of each factor, we create a 4-quadrant graph, shown on the following page.

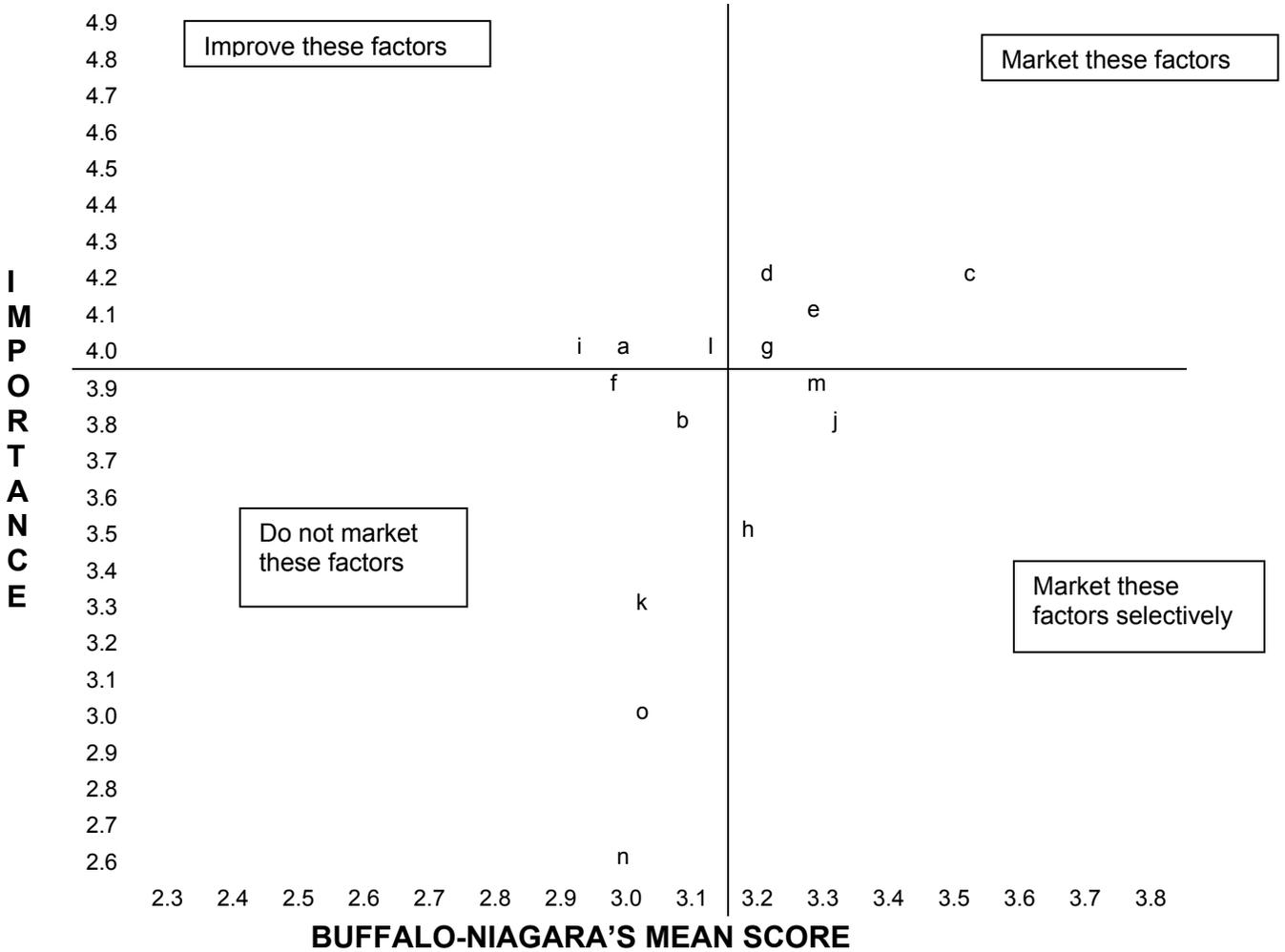
Factors in the upper right quadrant are relatively important to the respondents when making a location decision and are factors that are seen as relative strengths of the Buffalo-Niagara region. These factors should be marketed.

Factors in the lower right quadrant are factors that are relatively unimportant in site selection but for which the region scores well. These factors should be selectively marketed to those targets that value the attribute, perhaps to a specific industry cluster or based on the unique needs of a company.

Factors that fall in the upper left quadrant are important in the site selection process but seen as weaknesses for the region and therefore must be improved.

Finally, attributes in the lower left quadrant are attributes in which the region is seen as weak and are relatively unimportant in a location search. BNE's resources should not be used to market these attributes to this audience.

**Graph 1: Site selection factors:
Plot of Buffalo-Niagara's mean score
(x axis) vs. importance of factors (y axis)
(on a scale of 1 -5, where 1 is poor, and 5 is excellent)**



KEY	
Availability of skilled workers	a
Availability of managerial/professional workers	b
Efficient transportation systems (highway, air, rail, port)	c
Business-friendly government	d
Low overall costs	e
Competitive incentives/tax exemptions	f
Access to affordable personnel	g
Availability of good K-12 education	h
Low overall tax burden	i
Low occupancy and/or construction costs	j
Availability of worker training programs through the local community college system	k
Overall quality of life (cultural and recreational amenities, crime rate, etc.)	l
Cost of Living	m
Presence of research universities	n
Proximity to funding sources/ financial markets	o

Comparing Buffalo-Niagara with Competitors

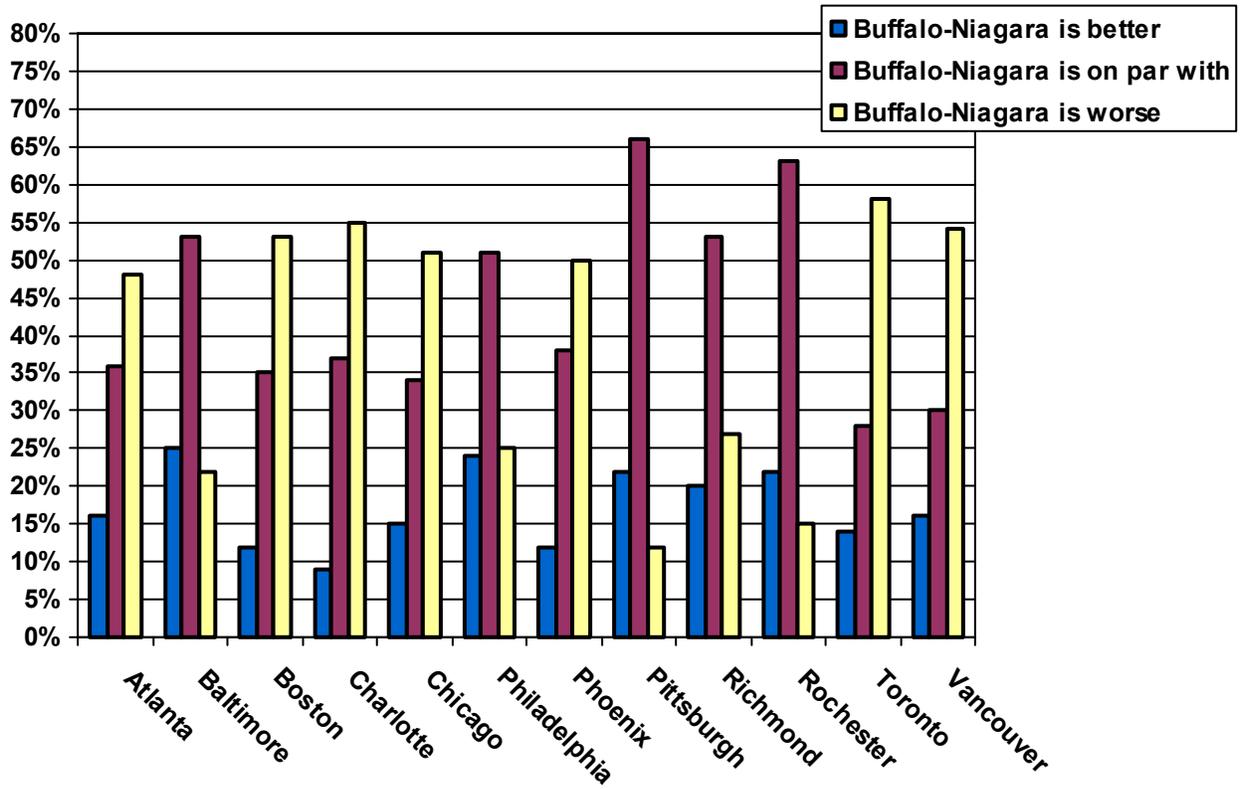
Respondents were asked to compare Buffalo-Niagara's business climate with the business climates of 12 other cities. Respondents had the option of rating Buffalo-Niagara as "better than," "on par with" or "worse than":

- Atlanta, GA
- Baltimore, MD
- Boston, MA
- Charlotte, NC
- Chicago, IL
- Philadelphia, PA
- Phoenix, AZ
- Pittsburgh, PA
- Richmond, VA
- Rochester, NY
- Toronto, ON
- Vancouver, BC

Overall, a clear majority of respondents rated Buffalo-Niagara's business climate as ***on par with Pittsburgh (66%), Rochester (63%), Baltimore (53%), Richmond (53%) and Philadelphia (51%)***, while Buffalo-Niagara was rated ***worse than Toronto (58%), Charlotte (55%), Vancouver (54%), Boston (53%), Chicago (51%) and Phoenix (50%)***. Comparisons between Buffalo-Niagara and Atlanta, yielded diverse opinions, such that no option gained a majority.

The following chart shows how respondents answered overall.

**Chart 4: Comparing Buffalo-Niagara's Business Climate with Competitors
(Percent of Respondents)**



Marketing Buffalo-Niagara

To learn if the marketing strategies being employed by Buffalo-Niagara Enterprise are reaching the target audience of corporate executives, the survey asked *“In the last year, have you (check all that apply): seen an ad in print about Buffalo-Niagara, attended an event hosted by Buffalo-Niagara, read a story about Buffalo-Niagara or a Buffalo-Niagara-based company, met with economic development representatives from Buffalo-Niagara, received a call from Buffalo-Niagara, heard about Buffalo-Niagara by word of mouth, or none of the above.”*

Only 36% of respondents report they have seen an ad in print about the region and 26% of respondents report they have read a story about Buffalo-Niagara or a Buffalo-Niagara-based company. Thirty-one percent chose “none of the above.”

All results are presented in Table E below.

Table H: Exposure to Buffalo-Niagara’s Economic Development Marketing Efforts

Marketing strategy	% of Respondents answering “Yes”
Seen an ad in print about Buffalo-Niagara	36%
None of the above	31%
Read a story about Buffalo-Niagara or a Buffalo-Niagara-based company	26%
Heard about Buffalo-Niagara by word of mouth	19%
Received a call from Buffalo-Niagara	8%
Attended an event hosted by Buffalo-Niagara	5%
Met with Economic Development representatives from Buffalo-Niagara	2%

The findings support the idea that the Buffalo-Niagara region needs a more active marketing program to reach its target audiences.

Survey Respondents' Media Choices

In an effort to identify media outlets that reach the widest audience, respondents were asked the open-ended question, “*What publications (newspapers, mainstream magazines, websites and industry publications) do you regularly read?*” The responses were coded and then analyzed.

Sixteen publications were mentioned by 3 or more survey participants. Reflecting that the majority of respondents are Canadian, *The Globe and Mail* was mentioned most often with 39%. The table below presents the most commonly mentioned media outlets.

Table I: Media Outlets Regularly Read (N = 76)

Media Outlet	% of Respondents
<i>The Globe and Mail</i>	39%
<i>The Wall Street Journal</i>	17%
<i>National Post</i>	17%
<i>The New York Times</i>	14%
<i>Time</i>	9%
<i>Fortune</i>	8%
<i>USA Today</i>	8%
<i>Business Week</i>	7%
<i>The Economist</i>	7%
<i>Newsweek</i>	5%
<i>Toronto Star</i>	5%
<i>Canadian Business News</i>	4%
<i>Financial Times</i>	4%
<i>Financial Post</i>	4%
<i>Forbes</i>	4%
<i>Toronto Sun</i>	4%

Also notable, 33% mentioned an industry-specific or trade publication, but no publication was mentioned twice. A list of all replies to this question can be found in Appendix D.

Facility Most Likely to Be Involved in Future Site Selection Decision

Though it must be noted that 35 respondents did not answer the question, **42%** of respondents who did told us that their company is planning on relocating, expanding, consolidating or building new facilities in the next 12-26 months.

Survey participants were also asked *“The next time that your company will move, expand, consolidate or add a facility, which of the following would be the most likely candidate for such a change?”* Respondents were asked to choose one from the following list of options:

- Corporate, division or regional headquarters
- Manufacturing/production plant
- Regional sales office or service center
- Distribution center
- Back office facility (financial services, data processing or telemarketing center)
- Other

Responses are presented in the table below.

Table J: Choice for Next Corporate Facility Change (N= 63)

Facility type	% of Respondents
Manufacturing/production plant	43%
Distribution center	24%
Regional sales office or service center	14%
Corporate, division or regional headquarters	10%
Back office facility	5%
Other	5%

These findings direct BNE to target its marketing messages to address the widest audience – those seeking manufacturing/production plants and distribution centers.

**APPENDIX A:
THE QUESTIONNAIRE**



Prepared for Buffalo-Niagara, February 2007

1) Have you ever been to the Buffalo-Niagara region? Yes No

If yes, what was the purpose of your visit? (Check all that apply) Business Education Vacation Convention Family Other:

If yes, how often? Once 2-5 times More than 5 times

If yes, was your last visit within? the past year 1-5 years more than 5 years ago

2) Regardless of whether you have visited Buffalo-Niagara, what three phrases or words come to mind when you think of the Buffalo-Niagara region?

1)
2)
3)

3) On a scale of one (poor) to five (excellent), what is your overall perception of Buffalo-Niagara's business climate?

Poor Excellent
 1 2 3 4 5

4) Based on your impressions of Buffalo-Niagara, please indicate up to three items you consider strengths and up to three items you consider weaknesses of the region:

Strengths	Weaknesses
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

5a) On a scale of 1 (poor) to 5 (excellent), please rate the Buffalo-Niagara region on each of these items:

	Poor					Excellent				
Availability of managerial/professional workers	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of skilled workers	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of worker training programs through the local community college system	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Access to affordable personnel	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Presence of research universities	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Proximity to funding sources/ financial markets	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Efficient transportation systems (highway, air, rail, port)	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Business-friendly government	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Competitive incentives/tax exemptions	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low occupancy and/or construction costs	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Quality of Life (cultural and recreational amenities, crime rate, etc.)	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of good K-12 education	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low overall tax burden	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low overall costs	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Cost of living	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5

5b) On a scale of 1 (poor) to 5 (excellent), please rate the importance of each of these factors to your business location decisions:

	Unimportant					Important				
Availability of managerial/professional workers	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of skilled workers	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of worker training programs through the local community college system	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Access to affordable personnel	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Presence of research universities	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Proximity to funding sources/ financial markets	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Efficient transportation systems (highway, air, rail, port)	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Business-friendly government	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Competitive incentives/tax exemptions	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low occupancy and/or construction costs	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Quality of Life (cultural and recreational amenities, crime rate, etc.)	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Availability of good K-12 education	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low overall tax burden	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Low overall costs	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5
Cost of living	<input type="checkbox"/>	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5

6) How would you rate the current business climate in Buffalo-Niagara compared to that of: (please check one rating for each area named):

	Buffalo-Niagara's Business Climate is better than	Buffalo-Niagara's Business Climate is on par with	Buffalo-Niagara's Business Climate is worse than
Atlanta, GA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baltimore, MD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boston, MA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charlotte, NC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chicago, IL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Philadelphia, PA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phoenix, AZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pittsburgh, PA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Richmond, VA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rochester, NY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toronto, ON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vancouver, BC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7) Which of the following industries do you associate with Buffalo-Niagara? (check all that apply)

- | | | |
|---|--|--|
| <input type="checkbox"/> Advanced Manufacturing | <input type="checkbox"/> Banking/ Financial Services | <input type="checkbox"/> Canadian/International Business |
| <input type="checkbox"/> Food/Food Processing | <input type="checkbox"/> Hospitality/Tourism | <input type="checkbox"/> Information Technology |
| <input type="checkbox"/> Logistics/Distribution | <input type="checkbox"/> Life Sciences | <input type="checkbox"/> Machinery |
| <input type="checkbox"/> Transportation Equipment | | |

8) In the last year, have you (check all that apply):

- seen an ad in print about Buffalo-Niagara
- attended an event hosted by Buffalo-Niagara
- read a story about Buffalo-Niagara or a Buffalo-Niagara-based company
- met with economic development representatives from Buffalo-Niagara
- received a call from Buffalo-Niagara
- heard about Buffalo-Niagara by word of mouth
- none of the above

9) What publications (newspapers, mainstream magazines, websites and industry publications) do you regularly read?



10) Is your company planning on relocating, expanding, consolidating or building new facilities in the next 12-36 months?

- Yes No

11) The next time that your company will move, expand, consolidate or add a facility, which of the following would be the most likely candidate for such a change? (Please select ONE option)

- Corporate, division or regional headquarters
- Manufacturing/production plant
- Regional sales office or service center
- Distribution center
- Back office facility (financial services, data processing or telemarketing center)
- Other:

APPENDIX B:
Top of Mind Impressions of Buffalo-Niagara

“Regardless of whether you have visited Buffalo-Niagara, what three phrases or words come to mind when you think of Buffalo-Niagara?”

Phrase 1	Phrase 2	Phrase 3
industrial	cold	restructuring economy
Sabres	Bills	Outlet Mall
Tourism	Canada US Border	Casino
proximity between usa and canada	easy road access	diversity, vacation and business
the Falls	Discount Mall	Border area
Majestic	Nature forces	Spectacular
poor downtown shopping selection	ex Steel town	city of malls
Beautiful	Clean	Friendly people
Niagara Falls	Rainbow Falls	Flower Clock
snowbelt	good cookie market	Beautiful area
wine - Niagara	dirty industry - buffalo	GM - St Catharines
Niagara Falls	The Bills	Snow
Hub to Eastern US	Proximity to Canada	Tourism
Niagara Falls	Outlet Shopping Center	Holiday Valley Ski Resort
old	chemicals	proud
industrial	lake effect	Niagara Falls
architecture in Buffalo	cheap beer	weak economy
Cold	Discount Shopping	Easy access to eastern seaboard via airport
Picturesque	Scenic	Home
Niagara Falls	Buffalo Airport	traffic
quality of life	wine country	sport fans
Distribution Location	Business Friendly	Depressed
Niagara Falls	Lots of Snow	Buffalo Sabres
Vacation	Niagara Falls	Cold
Niagara Falls	Outlet malls	Buffalo Airport
High taxes	poor weather	Casinos
snow in winter	nice in summer	nice place to live
skiing	Niagara Falls	
Canada's Gateway to the USA	Niagara Falls	Wine Country
falls	Buffalo Sabres	water
the Falls	Wineries	relaxation
Old industrial	Pleasant country side	Strong union influence
Niagara Falls	Sabres	Casino
Good place for a business	Very nice people	Snow
falls	wine	shopping
Niagara falls	Bills	Ellicottville
depressed area	old type of industries	not growing
Niagara Falls	Maid of the Mist	Snow
Niagara Falls		
Chicken wings	snow storms	Outlet mall shopping
Niagara Falls	Maid of Mist	Falls Casino

Depressed economically	poor workforce	city in decline
THE FALLS	NIAGARA CASINO	BUFFALO SABRES
Niagara Falls	Wine	Welland Canal
Golf	Water Falls	Niagara on the lake
Nice	Relaxing	interesting
Unattractive	Confusing	Dilapidated
historic	in decline	bureaucratic
Niagara Falls	Outlet Shopping	Buffalo airport
United States	Falls	wine
Close	Scenic Area	
Border Region	Tourist Region	
Manufacturing	Wine	Finger Lakes
soon be there	son be home	enjoyable
Wonder of the world	Wine	Beauty
Duff's wings	Walden Galleria	Fallsview Casino
Buffalo still looks depressed	Surrounding area more up to date.	
Friendly people	Niagara Falls	Casino
Business Hub	Vacation Area	Lots of snow
Niagara falls	nice country	USA
wings/sabers	border	older buildings
The Falls	Shopping	Attractions
Beautiful vistas	Tourist oriented	shabby
Niagara Falls	wine	casino
Industries moving out	Heavily unionized	Poor housing
the Buffalo Sabres	chicken wings	the falls
The Falls	New York	Nice place to visit
excellent business location	opportunities	Canada/US opportunities
Wine country	Falls	Bills
Fun	cold	exciting
Buffalo Bills	Buffalo Sabres	Buffalo Wings
spectacular	little old	potential
business oriented	cold	
Walden Galleria		
summer vacation	terribly cold and snowy in winter	long trip from New Jersey
cold	Sabres hockey	old
depressed	potential	friendly
Niagara Falls	Buffalo Bills	New York
depressed	cold	old time tourist attraction
Niagara Falls	Buffalo Sabres	HSBC Bank
Niagara Falls	Sports Teams	Weather - Snow
Niagara Falls	home	hockey
falls	Niagara on the lake	wine
Falls	snow	Canada gateway
Beautiful Natural falls	Casinos	Kind of tacky retail environment

Old	Manufacturing	Social problems
Niagara -ca-bussy	niagara-ny-quite	buffalo-underrated
Niagara Falls	Snowfall	Lake Erie
cold	industrial	remote
Buffalo - deprived	Niagara - over touristy	
Niagara Falls	Snow	Cold
Beautiful	Awesome	Breathtaking
Niagara Falls	Buffalo Bill	snow
Hockey	Falls	wine
depressed	unions	
Industrial	snow	hard working
waterfalls	beautiful	tourists
Pretty	Football	

APPENDIX C:

Buffalo-Niagara's Strengths and Weaknesses

"Based on your impressions of Buffalo-Niagara, please indicate up to three items you consider strengths and up to three items you consider weaknesses of Buffalo-Niagara."

Strengths

Strength 1	Strength 2	Strength 3
low freight cost to northeast		
airport	manufacturing industry	
Access to Canadian Market	Border Crossing	
facility to do business in the 2 countries	access to a big market(high populated area)	for Canadian business, important door to the USA
Location near Canadian Border	Casino	Proximity to US markets
Close to Buffalo, Toronto, Hamilton.	Presence of brokers, agents, Canada/USA	Very nice real estates
close to Canada and an appreciation of Canadians	Nice family oriented people	very sports minded
Clean city	Cultural aspects	
well positioned for e. canada % the usa	Attraction Area-Niagara Falls	Good entrance to the USA from Can.
geographic location		
Growing	Flexibility	Changing
pride		
tourism	link with Canada	history
geography	population	proximity to Canada
airport	shopping	travel and tourism to support international guests
Mild climate	Falls	Four seasons
Transportation Hub	Launching point into US Market	
Niagara Falls	Boating	Nature
reasonable labor wages	quality workforce	
Tourism	Variety of stores	
Gateway to the rest of the USA	Beautiful scenery	Good Hockey team
affordable	low key	near recreational areas
inexpensive		
Warehousing	Transportation Hub	Affordability
do not know the region	do not know the region	
Pleasant surroundings	Bordering Canada	Able work force
tourist	entertainment	
Close to the Canadian border	Easy access to go South	Price of land
taxation	proximity to border	nfl team
close to Canadian border	part of USA	
Canadian and US Market	College community	
Good geographic location	Relatively low cost area - people and location	Niagara Falls
Niagara Falls	Buffalo wings	Casino
proximity to Toronto	good tourist area	
TOURISM	US/CANADIAN BORDER	
Transportation	Labor Force	Cross-Border Access/Market
scenery	Accessibility	falls
Location	Airport	Attractive Canadian Side
location	access	
Excellent Highways bypassing city of Buffalo		
Closest US access to Toronto	Reasonable costs	available workers
Proximity to Border		
bringing over goods	quality of same	competitive

Friendly atmosphere	French population	Multicultural Society
Highways	Shopping	Food
Good transfer point from Toronto		
Dedicated work force--good people	Geographical location for business	Low cost power
I am aware of a lot of government support for new businesses	close to Canada (important for me)	close to a huge market in my industry
Factory Labor Market ?	Union Environment?	Government Business Incentive Programs?
people available	close to Canada	relatively reasonable pricing
Scenery	Attractions	Food
Border proximity		
falls	wine	casino
Available work force	Good transportation network	Higher education
close to Canada	understand Canada	good warehousing distribution facilities
Tourist Facilities	Friendly people	
location	strength in alliances	opportunities for business
Beauty	Healthy	
people	attitude	accessibility
Manufacturing	Diversity	Location
Scenery	population	
tourism	near wine country	close to Canada for vacations
natural resources	proximity to Canada	strength of individual neighborhoods
tourism	location	
possible reinvigorating urban center	a commercial hub in the new world of ethanol	
Beautiful Area	US/Canada border	Highways
Natural resources of waters (Niagara, Lake Ontario, Erie)	Proximity to Canada	Major sports teams are a major economic draw.
Niagara Falls	location - Canada	travel
proximity to Canada		
Labor is middle of the road cost, not too high	telecom good	
Tourism	Natural beauty	Growing capacity and facilities
Large workforce	Proximity to large markets	Good communications (road/rail/water)
no congestion	cost of living	
Natural features	Geographic location	Gateway to Canada
Easy Access to Canada	Access to Western NY	Relative good business location with easy access to Canada, midwest and NY state
Natural Beauty	The Falls	
Cost of Living	Location	
close to Toronto	close to NYC	labor supply
Natural Beauty	Regional Hub	
solid workforce	proximity to markets	cost structure
location	location	location
Eastern US location	Favorable Labor market	

Weaknesses

Weakness 1	Weakness 2	Weakness 3
weather	infrastructure	taxation
toll roads	expressways are confusing	
Economic Climate		
could be perceived only as a vacation area	time wasted waiting at the borders	
Weather	Not very pretty	Cultural activities
Price of land	Cost of living	Reputation of Buffalo being not good looking
Industrial town with union mentality	petty politics/ corruption	good selection for shopping
Snow storms	Downtown area Buffalo not the greatest	
environmental	old industry	high unemployment
economy		
Crime rate	Border crossing slowness	New Central Industrial Availability
location	cost	infrastructure
economic climate	downtown core	union environment
economy	older industries	somehow dangerous
roads	highway tolls	availability of restaurants and hotels
Snow belt		
perception as lower middle class region	beauty of countryside not promoted	seen as suburb of Toronto
Climate	Population /growth	Industry
limit skills in the workforce	number of qualified employees	limited / no bilingual / multilingual skills
border slowdowns	highway tolls	
Taxes too high	No industry left	Both Gov'ts want casinos not industry
winter weather	small population	lack of infrastructure
Unions	Old Infrastructure	
Labor Unions	Poor work ethics	Out of the way
Peoples overall perception on Buffalo	Don't seem to advertise themselves to the business community	
crime	workforce	fires
depressed area	old type of industries	not growing
Weather	Proximity to NYC	
Not as well maintained as Canadian side	Perception of NY as high tax state	
A little "dumpy" in areas	Difficult to find locations	Border crossing sometimes difficult
poor infrastructure	poor workforce	
CLEANLINESS		
Seasonal	Low Growth Potential - other than tourism	Taxation
poor cleanliness	cheesy down town	over commercialized
culture	legal bureaucracy	employment laws
bad sign posting especially to navigate through the city of Buffalo		
border/bridge congestion	NYS labor laws	
crossing the bridges	wasting time	
High end accommodations	Architecture	Sabres (just kidding)

Mainly looks	4 yrs ago not much available warehousing	
High taxes	Poor industrial vision--politically self centered	Low cost power not available
Factory Labor Market?	Union Environment?	Government Business Incentive Programs?
snow	legal considerations	Border
Weather(winter)	Expensive	
Tourism major industry	climate	little land development potential
Northern Union mentality	Weather - costs associated with	Difficult to attract out of state management
the weather		
Industry	Self Promotion	
diversification	perception	
Ageing infrastructure	Smoke stack industries	
needs improvement	air quality	
Hard to get to	reputation as dying area for business	harsh winter weather
ineffective leadership	heavy reliance on public sector employment	self interested political environment
Big City problems		
lost a banking icon brand to HSBC	not a strong technology center	
Parts of Niagara are trashy looking	Border Crossing waits	
Economy and downtown area being in close shape to Erie/depressed and tough time.	Heavy Industry leaving the area ie steel mills.	weather - famous for snow and cold weather
old city	rust belt	old mills
border crossing		
snow days	Too many call centers (our competitors) in area	
Retail areas less than attractive	difficult air connections	
Smokestack industries - retraining needed?	Union issues?	High costs?
poverty		
Declining city center	Harsh winter	New York State
Weather	Fundamental negative impression	
Economy	Weather	
Weather	Location	
organized crime area	pollution	traffic congestion
Labor unions	Financial problems	job loss
government	regulation	
competition	history	climate

**APPENDIX D:
PUBLICATIONS RESPONDENTS REPORT
THEY REGULARLY READ**

“What publications (newspapers, mainstream magazines, websites and industry publications) do you regularly read?”

NY Times, WSJ, Time, USA Today, Google, CNN
Globe & Mail, Toronto Star
Financial Post Toronto Sun Fortune Canadian Business News
La Presse Les affaires
National Post New York Times Fast Company Inc Fortune Macleans Canadian Business Profit
French Canadian newspapers. Les affaires. Lumber related industry magazines
Globe and Mail , profit magazine, industry specific
NY Times, Local Canadian magazines/newspapers Canadian and American newspapers online
National Post
globe and mail, environmental protection, hazardous materials magazine, Canadian environmental equipment
National Post
Automotive News Business week
Globe and Mail USA Today
trade mag
Globe & Mail La Presse Google
Economist CFO.com news letter Canadian Business Macleans
USA Today MSN web site
New York Times-Financial Post-Montreal Gazette- Printing& vast array of industry publications
Global Mail USA Today
Call Center Magazine, Site Selection Magazine, IFMA, Corenet Global
Stockhouse website Globe and Mail newspaper Canoe website Bloomberg Financial
National Post, Toronto Sun, St. Catharine’s Standard
The Toronto Sun
Wall Street Journal

Hamilton Spectator
National post
The Globe and mail
food in Canada, Frozen food age
Globe and Mail, Newsweek, MSN, Plastic News
WSJ
Harvard Business Review
NY Times
Chicago Tribune
The Economist, The Globe and Mail
Globe and Mail
National Post
Business Week, Fortune
Woodworking, Health & Safety, local newspaper
Profit, Meat Processors
Globe and Mail, New York Times, USA Today, Financial Times
national post, wall street journal, various others
The Globe and Mail
Machine Design Trailer Body Builder Globe and Mail
Time
National Post
Pulp & Paper
Benefits Canada
The Bottom Line
Globe and Mail
globe & mail
Temiskaming Speaker, Toronto Star, Globe & Mail, CPSA magazines
Globe & Mail, People, Fortune, Forbes
Globe & Mail, Forbes, Time, Packaging Digest, PMT, Global Cosmetic Industry
Manufacturing based magazines--local newspapers
Plant, Scientific American, Toronto Daily Star, Time
Time, Actualités, Journal des Affaires
globe and mail, montreal gazette, crn
The Wholesaler, Supply house Times, Industrail Distribution, the Globe & Mail.
star, globe, the news,
Toronto Globe & Mail
Power Engineering
Canadian machinery & Metal working
Globe and Mail
Fortune, BusinessWeek, Globe & Mail
Economist
Time
WS Journal, NY Times, Globe & Mail-Report on Business,

Globe and Mail National Post Barons
Finacial Post
forbes, wall street journal, barrons
Wall St. Journal, HBR, Atlantic Monthly
Wall Street Journal, Financial Times , Buffalo News,
National Post
NY Times, WSJ, USA Today, New York, New Yorker, Vanity Fair
Globe and Mail National Post Edmonton Journal BusinessWeek, Time
Newsweek, Erie Daily Times, Insurance-related periodicals
magazine , transportation
national post
Wall St Journal, Business Week, Newsweek
Wall Street Journal, Economist, New York Times, National Post, Globe and Mail, Newsweek
The Economist, Fortune, Oil & Gas Industry publications.
Websites: BBC, New York Times, Washington Post, LA Times, London Times, London Telegraph
The Packer, Asia Fruit, Euro Fruit
New York Times, Washington Post, Science, Nature, Emerging Infectious Diseases
Philadelphia Inquirer, Kiplinger Report, Wall Street Journal
Calgary Herald, Vancouver Sun
New York Times, Wall Street Journal, Smithsonian, banking journal
Globe & Mail, Business, Report on Business, Financial Times
Trade Magazines, Food Industry