

Buffalo-Niagara Region's
Business Climate:
An Analysis of the Perceptions of
Site Selection Consultants

Prepared for:



March 13, 2007

dc*i*

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Executive Summary

In December 2006, Development Counsellors International (DCI) launched a survey of site selection consultants on behalf of the Buffalo-Niagara Enterprise. The study was designed to measure perceptions of the business climate in the Buffalo-Niagara region and serve as a basis for a marketing blueprint and an editorial placement program.

Three hundred and forty site selection consultants from DCI's database were invited to participate. The questionnaire was accessible online and participants were offered specialty chocolates from Choco-Logo. A copy is presented in Appendix A.

Forty-four professional site selection consultants from throughout the United States responded. The following summary presents the key findings of the survey.

1. Respondents are familiar with Buffalo-Niagara. Eighty-two percent have visited the region.
2. Buffalo-Niagara is known for its cold weather and snow, a majority (55%) of respondents cited in an open-ended question regarding what comes to mind when thinking of Buffalo-Niagara. This was followed by 52% mentioning Buffalo-Niagara's appeal to tourists and 32% mentioning Buffalo-Niagara's industry strengths (e.g. "manufacturing").
3. The industries most associated with Buffalo-Niagara are **Canadian/International business (66%)**, followed by **advanced manufacturing (50%)** and **hospitality/tourism (46%)**.
4. When asked to consider the region's strengths, respondents most often mentioned its **workforce (48%)**, its **location (40%)** and its **education system (38%)**.
5. **Bad weather (61%)** and a **poor business climate (44%)** were mentioned most often by respondents asked to list the region's weaknesses.
6. Buffalo-Niagara's business climate is rated as **on par with Pittsburgh (83%)**, **Rochester (83%)**, **Philadelphia (60%)**, **Vancouver (56%)**, and **Richmond (55%)**.
7. Buffalo-Niagara was rated **worse than Charlotte (83%)**, **Atlanta (73%)**, **Phoenix (70%)**, and **Chicago (56%)**.
8. The most important factors in a site location decision are: *availability of skilled workers, low overall costs, and business-friendly government.*
9. Buffalo-Niagara earns its highest scores for its *availability of skilled workers, availability of worker training programs through the local community college system, and cost of living.*
10. Fifty-five percent of respondents report they have read a story about Buffalo-Niagara or a Buffalo-Niagara-based company and 46% of respondents reporting they have seen an ad in print about the state.

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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?"*

Thirty-six of the 44 survey respondents (82%) answered affirmatively.

When queried about the reason for their visit to the region, **61% indicated business, and 10 respondents (32%) indicated vacation.**

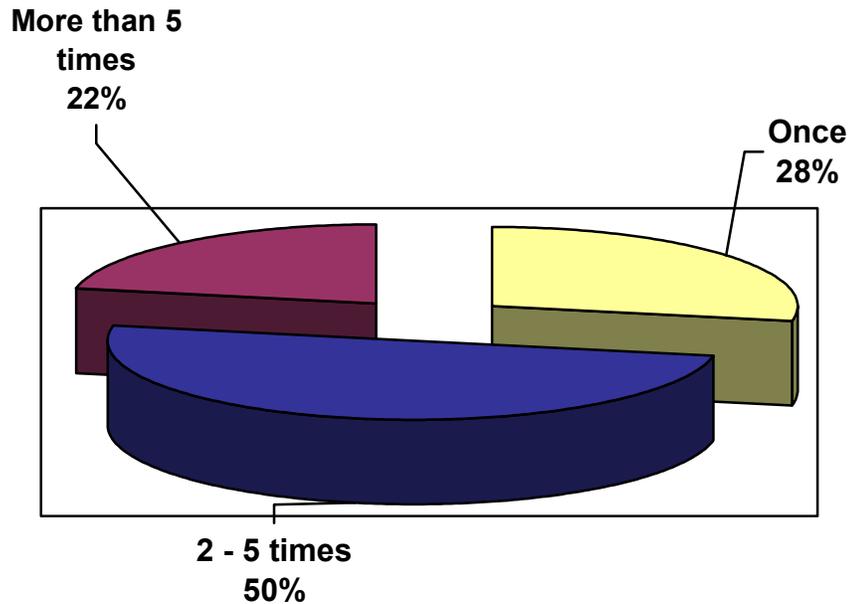
All replies are shown in the table below.

Table A: Purpose for Visiting Buffalo-Niagara

Purpose	% of Respondents
Business	61%
Vacation	36%
Family	7%
Convention	5%
Education	2%
Other ("born and raised")	2%

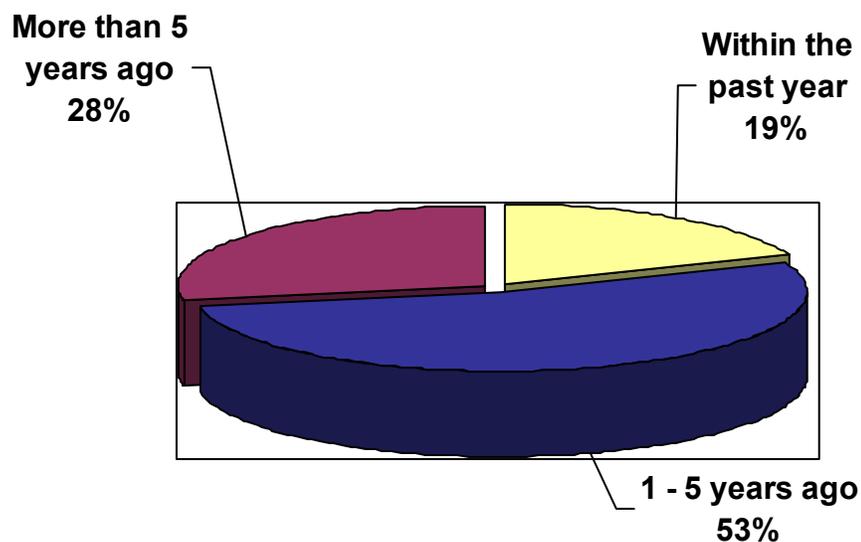
The survey also sought to learn how frequently site selection consultants visit Buffalo-Niagara. Multiple visits are common among the sample group (most have been to the region at least twice.) The answers to the question regarding how often respondents visited are presented in the following chart.

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



Finally, among those who have ever visited Buffalo Niagara, most (53%) reported that their last visit occurred 1-5 years ago. 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 for “top of mind” impressions of Buffalo Niagara, 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?” Not surprisingly, a majority of respondents (55%) cited Buffalo-Niagara’s cold and snow. This was followed by 52% mentioning Buffalo-Niagara’s appeal to tourists, including Niagara Falls and the famous wings. Thirty-two percent mentioned Buffalo-Niagara’s industry strengths, citing manufacturing and its success in attracting back office facilities.

The table below summarizes the responses. Appendix B presents all answers.

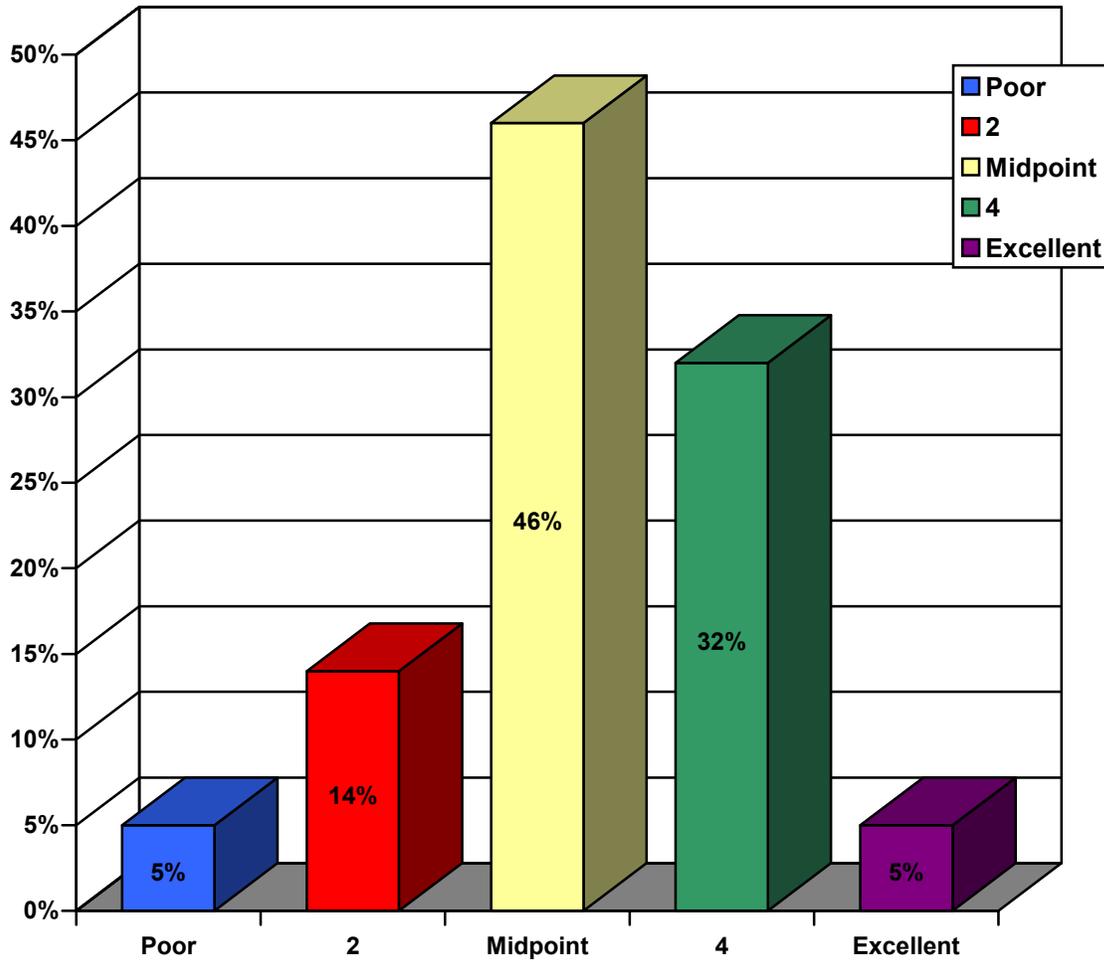
Table B: Top of Mind impressions of Buffalo Niagara

Answer	% of Respondents
Weather (“cold,” “snow”)	55%
Tourism (“Niagara Falls,” “Wings”, “wine country”)	52%
Industry (“Manufacturing,” “New back offices”)	32%
Football (“Buffalo Bills”)	25%
Economic development (“BNE,” “Proactive economic development”)	23%
People (“Well educated,” “friendly”, “loyal employee base”)	20%
Quality of Life (“nice area”)	16%
Canada (“gateway to Canada”)	14%
Negative comment (“decaying,” “in need of renovation”)	14%

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 3.18 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 68% of the respondents was **Canadian/ International business** followed by **advanced manufacturing** (50%). **Hospitality/ tourism** is in third place with 46%. 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	66%
Advanced manufacturing	50%
Hospitality/ Tourism	46%
Machinery	41%
Logistics/ Distribution	32%
Life Sciences	32%
Food/ Food Processing	32%
Banking/ Financial Services	32%
Transportation Equipment	21%
Information Technology	11%

To raise the image of Buffalo Niagara as a center for desirable industries which are not readily associated with the region, such as information technology, state and local authorities should continue to encourage these industries. 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, its workforce (48%) was mentioned most often, followed by its location (40%). The most-mentioned strengths of the region are presented in the table below. Percentages do not total 100 because most respondents listed several factors that were coded into several categories.

Table D: Buffalo-Niagara’s Strengths

Respondents	Strength
48%	Workforce, particularly the good work ethic and the high skill levels found in the region
40%	Location, including references to its proximity to Canada, the Midwest and the Atlantic Coast
38%	Education system, including a specific mention of SUNY and its pharmacy school
19%	Quality of Life
17%	Utilities, such as reliable power and abundant water
17%	Cost, specifically the low costs of living and doing business
14%	Strong infrastructure, described by one respondent as “better than average”
14%	Development efforts, including re-branding efforts and downtown revitalization plans/ goals

Similarly, the responses regarding Buffalo-Niagara’s weaknesses were coded and counted. Predictably, cold weather was mentioned by 61% of respondents. The most-mentioned responses are presented in the table below.

Table E: Buffalo-Niagara’s Weaknesses

Respondents	Weakness
61%	Bad weather, described as “cold” and “snowy”
44%	Poor business climate, with references to taxes, and high costs
34%	Location, described as “remote” and “inconvenient”
17%	Negative perceptions of the region, with references to Buffalo-Niagara’s “image” both internally and externally
15%	A shrinking population, respondents cited the low population growth rate, loss of jobs and shortage of managerial/professional workers
15%	Presence of labor unions

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.

**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
Availability of skilled workers	3.60
Availability of worker training programs through the local community college system	3.54
Cost of living	3.43
Access to affordable personnel	3.41
Competitive incentives/tax exemptions	3.32
Efficient transportation systems (highway, air, rail, port)	3.29
Availability of good K-12 education	3.29
Overall quality of life (cultural and recreational amenities, crime rate, etc.)	3.29
Business-friendly government	3.26
Presence of research universities	3.24
Availability of managerial/professional workers	3.15
Low occupancy and/or construction costs	3.10
Low overall costs	3.00
Proximity to funding sources/ financial markets	2.78
Low overall tax burden	2.26

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.

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

Factor	Importance Mean Score
Availability of skilled workers	4.49
Low overall costs	4.33
Business-friendly government	4.26
Efficient transportation systems (highway, air, rail, port)	4.24
Availability of managerial/professional workers	4.21
Competitive incentives/tax exemptions	4.14
Access to affordable personnel	4.12
Low overall tax burden	3.95
Availability of good K-12 education	3.91
Low occupancy and/or construction costs	3.81
Overall quality of life (cultural and recreational amenities, crime rate, etc.)	3.74
Availability of worker training programs through the local community college system	3.72
Cost of Living	3.70
Presence of research universities	3.37
Proximity to funding sources/ financial markets	2.93

This analysis suggests which attributes should be marketed more strongly, and/or improved in order to improve perceptions of the region.

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.

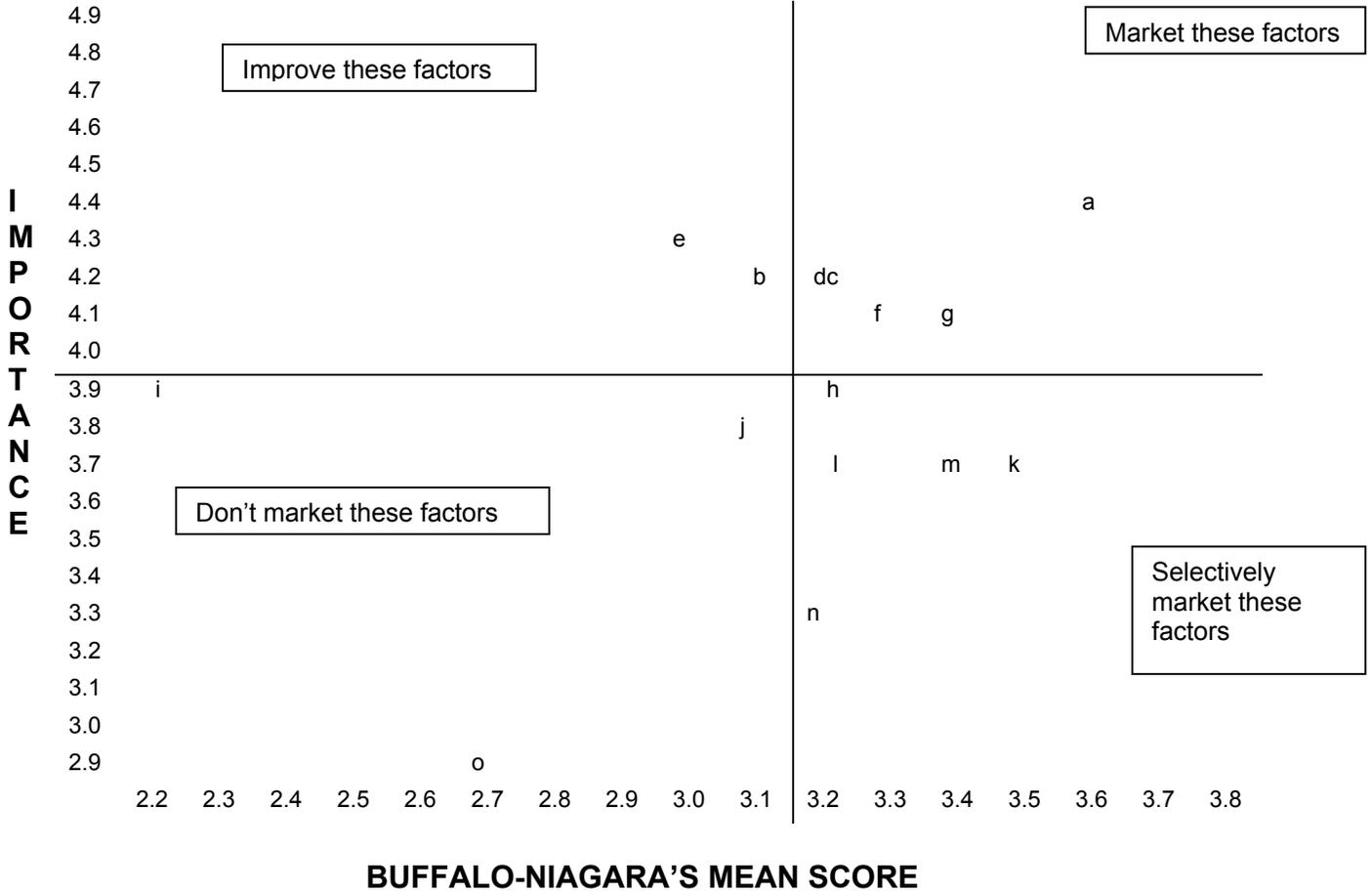
Factors in the upper right quadrant are relatively important to the respondents when making a location decision and are factors that are seen as relative strengths of the Buffalo-Niagara region. These factors should be marketed. For example, "availability of skilled workers" ranked first for Buffalo-Niagara and first in terms of importance in a site search, and therefore should be heavily 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. "Availability of managerial/ professional workers" is important in a site selection decision, but Buffalo-Niagara scores relatively low, suggesting effort should be made to increase and publicize the availability of these workers.

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":

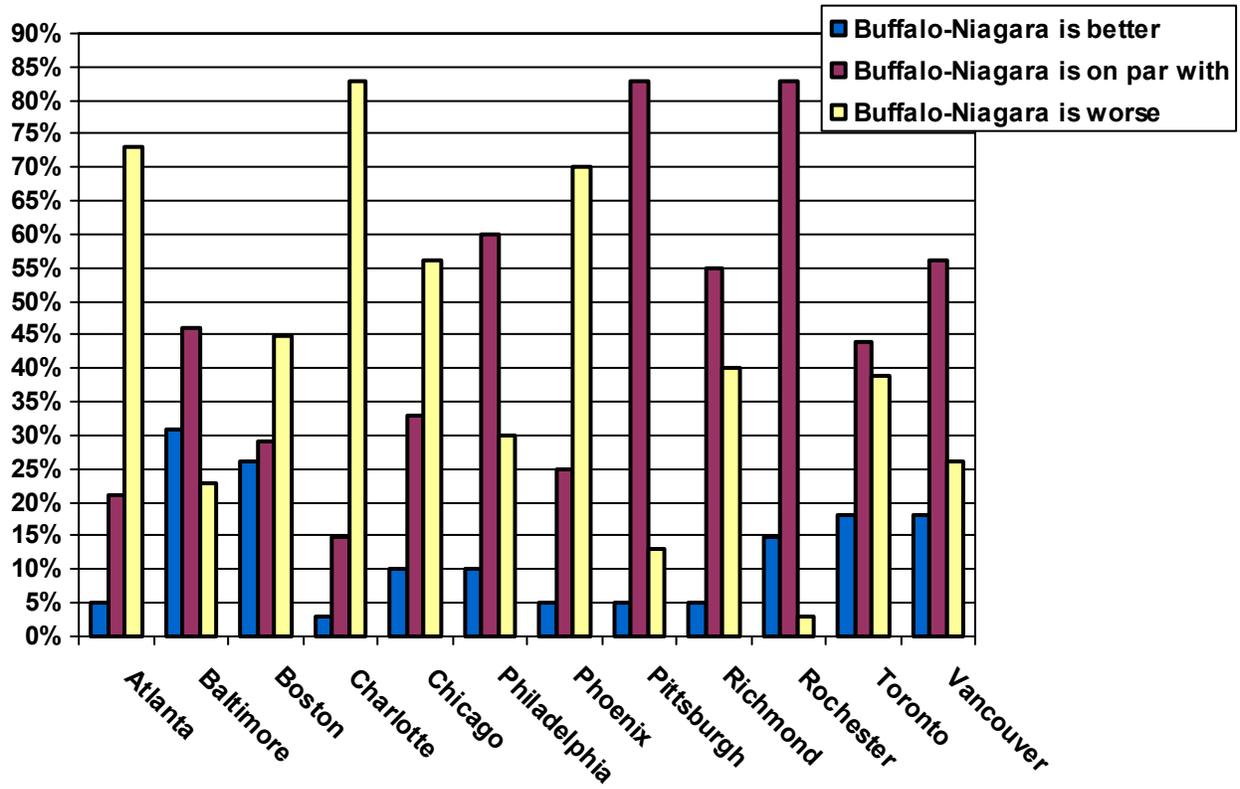
- Atlanta, GA
- Baltimore, MD
- Boston, MA
- Charlotte, NC
- Chicago, IL
- Philadelphia, PA
- Phoenix, AZ
- Pittsburgh, PA
- Richmond, VA
- Rochester, NY
- Toronto, ON
- Vancouver, BC

Overall, a clear majority of respondents rated Buffalo-Niagara's business climate as ***on par with Pittsburgh (83%), Rochester (83%), Philadelphia (60%), Vancouver (56%), and Richmond (55%)*** while Buffalo-Niagara was rated ***worse than Charlotte (83%), Atlanta (73%), Phoenix (70%), and Chicago (56%)***.

Comparisons between Buffalo-Niagara and Baltimore, Boston, and Toronto 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 site selection consultants, 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.”*

Media relations efforts seem to have also been successful in reaching the site selection consultants, with 55% reporting they have read a story about Buffalo-Niagara or a Buffalo-Niagara-based company and 46% of respondents reporting they have seen an ad in print about the state. Twenty-three percent reported that that had not been touched at all by Buffalo-Niagara’s marketing efforts. All results are presented in Table E below.

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

Marketing strategy	Respondents answering “Yes”
Read a story about Buffalo-Niagara or a Buffalo-Niagara-based company	55%
Seen an ad in print about Buffalo-Niagara	46%
Heard about Buffalo-Niagara by word of mouth	32%
None of the above	23%
Met with Economic Development representatives from Buffalo-Niagara	18%
Received a call from Buffalo-Niagara	11%
Attended an event hosted by Buffalo-Niagara	11%

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. Over 27 publications were specifically named.

The Wall Street Journal was mentioned most often by 18 of the 35 respondents who offered an answer to the question. *Site Selection* earned 12 mentions, putting it in second place. Other economic development publications (*Expansion Management*, *Area Development*, and *Business Facilities*) received 11 votes each. *The New York Times* was mentioned 10 times. Appendix D contains a list of all media outlets mentioned.

**APPENDIX A:
THE QUESTIONNAIRE**



1) Have you ever been to Buffalo-Niagara?

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 Buffalo-Niagara?

1)

2)

3)

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

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 Buffalo-Niagara:

Strengths

Weaknesses

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

Poor

Excellent

Availability of managerial/professional workers 1 2 3 4 5

Availability of skilled workers 1 2 3 4 5

Availability of worker training programs through the local community college system 1 2 3 4 5

Access to affordable personnel 1 2 3 4 5

Presence of research universities 1 2 3 4 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?



Thank you for completing this survey. All responses will be kept confidential.

Please submit your information below if you wish to receive a unique selection of specialty chocolate provided by Western New York chocolatier, Choco-Logo.

When you have completed the survey click the “submit” button:

First Name: (optional)

Last Name: (optional)

Title: (optional)

Company: (optional)

Email: (optional)

Questions may be directed to Neilia Stephens at (212) 725-0707
or via e-mail: neilia.stephens@dc-intl.com

**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
football	vacant main street	snow
downtown redevelopment	great quality of life	new back offices
Niagara Falls	Snow	Cold
Lake Ontario	Buffalo Bills	Superman 2
Beautiful	Snow	Falls
Industry	Winter	Clean
Manufacturing	Cold	Polluted
Snow	Manufacturing	Wings
snow	Bills	Lake Erie
Niagara Falls	Buffalo Bills	Upstate NY (Canada gateway, wine country)
Medical	Asset Recovery Business Cluster	Proximity to Canada
Water	NY Center of Excellence	Canada
Gateway to Canada	A labor force with a good work ethic	Severe winters
International opportunities	Many brownfield redevelopment opportunities	Loyal employee base
cold	energy	Canada
The Falls	Erie Canal	Good eating
The Falls	Cold in Winter	The Bills
downtown is depressed	needs revitalization	
Depressed economy	Lake Effect snow	Buffalo Bills
Nice area	Pleasant people	good place to do business
Awesome!	Hard working	Dynamic
Friendly	Professional	Cold Weather
decaying	overwhelming	needs a new focus
Blue collar	Canada	SUNY
Tourists	Manufacturing	Labor supply
Well Educated	Bills	Snow
heavy industry	Niagara Falls	snow
Buffalo Wings	Niagara Falls	Buffalo Bills
beautiful	cold	wine
traditional industrial city	growing customer service	Niagara Falls tourism
Niagara Falls	Cold and snow	
the falls	shopping	snow
Falls	Bills	Snow
Electric Power	Snow	Proactive Economic Development
Quality	Good workforce	Aggressive
low-cost	manufacturing	
Undiscovered	Second tier	remote
Buffalo Bills	Niagara Falls	Severe Snow Storms
Buffalo Bills	Niagara Falls	5 hours from NYC
Waterfall	Snow	Quality of life
Niagara Falls	Love Canal	Chemical Plants
cold	lots of period buildings in need of renovation	spectacular waterfall
The Falls	Snow	BNE
Inclement weather	Aggressive economic development efforts	Moderate cost-of-living

**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:

Strength 1	Strength 2	Strength 3
good labor pool	low cost of living	good education system/universities
labor market	business costs	higher education
Close Proximity to Canada - Toronto	Niagara Falls	Colleges/Universities
Tourism		
Infrastructure	Access to Markets	
skilled employees	good access to Canada	plenty of available manufacturing space
skilled manufacturing workers		
cancer center	university	grit
Canada access	NY education system	
Strong Work Ethic	Ample Reliable Power	Great Higher Education System
Manufacturing History	Attractive Quality of Life	Solid Rebranding Efforts
A labor force with a good work ethic	A good business climate	Excellent access to Canada, a maquiladora type situation
ease of access to Canadian markets	better than average infrastructure	resurgent downtowns
labor	cost	education
Wonderful summers	Lots of history--canal, early American, Indians	Water, water everywhere
Well located for international business		
abundant water	industrial base	
Workforce with traditional skills	Central location for US Midwest and Canada	
Good supply of existing property for lease	Easy to get around	
Workforce	Educational system	Snow (quality of life)
Quality of Workforce	Proximity to Canada	
desire to revitalize		
Border for trade	university town	state of New York
Good area for manufacturing	Falls are a good tourist attraction	Good local labor supply
SUNY & Pharmacy School	No power transmission congestion	Great public schools
work ethic	infra structure	business costs
Close to Canada	Close to the Midwest and Atlantic Coast	Shipping Ports
location	workforce	quality of life
low back office operating costs	downtown revitalization plans/goals	growing life science research?
beautiful area location	nice people	
Workforce	Education	Commitment
Perception of electric power capacity	Access to Canadian market	Outdoor activities
Aggressive	Workforce	Education

Strength 1	Strength 2	Strength 3
low-cost environment	semi-skilled workforce	education institutions
Labor market	quality of life	cost of living
Upstate New York	Natural Wonder	
Great place to visit when you go to Canada		
Cheaper electric power		
university & colleges	good transportation system	available workforce
Low cost of labor that is good quality	Substantial education resources	Strategic location US/Canada East/West
Utilities	Education	

Weakness 1	Weakness 2	Weakness 3
bad weather	badly in need of retail development	geographically inconvenient for mfg./dist.
perception of cold/rust belt	legacy union influence	NYS business climate and tax burden
Location	Lack of Industry	Snow
Weather		
Taxes	Weather	
Strong Union presence	High costs	decaying infrastructure
unionization	unemployment	
old industry	political rancor	NY state
Remote for US distribution	Perception of union labor	
Slightly Higher Labor Costs	Slightly Higher Power Costs	Air Access
Manufacturing History	Remote	
Weather	Image	
climate - extreme temperatures and frozen precip.	availability of managerial/professional workers	Competition from nearby cities
location	weather	air service
Snow	Cold winters	Gritty, industrial
New York business climate		
50 % loss of resident base	cold	
Quality of life		
Climate		
Low Self Esteem/Bad Self Image	Poor National Image	Snow
Snow / Cold		
parochialism	business climate	
loss of manufacturing jobs	depressed economy	
Area not well know except for tourism	Snow	
climate	remoteness	low population growth rate
Not easily accessible	Bad weather (potential for citywide shutdowns)	
location	weather	remoteness
perception industrial decline	seen as snowy, cold	
too much snow	bad business climate in state	
relative isolation		
State Government Cost Burdens	Energy Costs	Overall Regulatory Environment
Union perception	Weather perception	Power cost
Location	Climate	State Regulation
skilled workforce	higher learning institutes	
air service	proximity to markets	weather
Severe Weather/Cold		
Far from NYC	Cold	Small City
environmental issues		
lack of infrastructure		
Old and tired	Politics needs to focus on the future	Education in the city is a challenge
Weather	Infrastructure	

**APPENDIX D:
MEDIA OUTLETS RESPONDENTS REPORT THEY REGULARLY
READ**

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

Media Outlets
All of the economic development and corp. real estate journals plus the national business magazines and NYT.
Expansion Mgmt
Tax Incentive Alert, NY Post
Wall Street Journal, The Economist, Newsweek, Sports Illustrated, Area Development, Business Facilities
Site Selection, Expansion Management, New York Times
The Economist, Fortune, Forbes, Wall Street Journal, CNN Money, Drudge
Business Facilities, Newsweek, CFO, WSJ
Forbes, Fortune, All Site/ED Magazines
(standard list of Site Selection periodicals), WSJ, NYT, Local Papers
Expansion Management, Business Facilities, Area Development
NY Times, Financial Times, Crains
New York Times / Newsweek/ Crains / Wall St Journal/ Real Estate Forum /
New York Times, Wall Street Journal, Site Selection, Fortune, St. Louis Post-Dispatch, Time, Atlantic
Site Selection, Area Development, Business Facilities, Expansion Management, Forbes
New York Times
Business Facilities Magazine, Expansion Management Magazine, Wall Street Journal, CoreNet Global website
Buffalo News, New York Times, Wall Street Journal, Sports Illustrated, Business Week
Forbes, Fortune, The Economist, Crains, etc.
Real Estate Forum National Real Estate Investor NY, NJ, Buildings,
Wall Street Journal
NY Times, Newsweek, Globe Street, RE Business Online, Site Selection
Wall Street Journal, Crains Business (Chicago, Detroit, and NY)
Business Facilities, Area Development, Expansion Management
Wall Street Journal, Economist, Business Week, Newsweek, Business Facilities & other site selection magazines
Forbes, Site Selection, Wall Street J., Business Week, internet
WSJ, Forbes, Crains, Area Dev, Site Selection, Expansion Mgt, Business Facilities

Media Outlets
Economist, Google, Yahoo, Area-Development
Broad spectrum
wall street journal, NY Times
Site Selection; Area Development; Expansion Management; Business Week; Fortune; Forbes
Site Selection, Wall Street Journal, IEDC
WSJ, Corenet Leader, site selection, business week
Wall Street Journal, National Real Estate Investor
Area Development, Many web sites accessed through Google, skim USA Today and WSJ
Most economic development journals