Buffalo Niagara’s Strategic Plan for Prosperity

JANUARY 2017
WNY Regional Economic Development Council

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Mayor,
City of Jamestown
A Message from the Co-Chairs

On behalf of the Western New York Regional Economic Development Council, we thank you for the opportunity to present a comprehensive plan for Buffalo Billion Phase II.

Understanding how we arrived at this important turning point in Buffalo's history is a credit to the people and ideas that drove Buffalo to unite around a shared vision for a dramatic shift in the region's landscape, psyche, and economy. We thank Governor Cuomo for his leadership and his dedication to Buffalo and the region. Governor Cuomo recognized Buffalo's potential and it was that belief that inspired the success of Buffalo Billion Phase I and the transformational activities proposed in Buffalo Billion Phase II. We also thank Lieutenant Governor Kathy Hochul for her vision and for her continued support of our Regional Economic Development Council. Finally, we thank the thousands of people who contributed to the ideas laid forth in this latest plan to reinvigorate Buffalo's economy. It is both New York State's leadership and the community's shared commitment that will continue to shape a prosperous and sustainable economic future.

The Buffalo Billion Phase II plan looks back at the extraordinary strides Buffalo Niagara has made since 2011. It describes the progress and impacts of Buffalo Billion Phase I investments; and using economic indicators, points to areas where we've seen progress and where there are still opportunities for growth. It gives a compelling account of why we need to continue to invest in the economic enablers and core sector strategies that we as a community developed. And, based on this momentum and additional areas of opportunity presents a concrete plan for millions in additional public investment to leverage the private sector and continue to grow Buffalo Niagara's economy.

We thank you for your continued support of Buffalo's comeback and look forward to working together on our next investment strategy.

Sincerely,

Satish K. Tripathi                                          Jeff Belt
Buffalo is getting noticed on the national stage like never before.

“Millennials Are Moving To Buffalo & Living Like Kings”
— gothamist, January 28, 2015

“Buffalo’s tech scene reboots the city”
— USA TODAY, August 23, 2015

“New York’s second largest city has sprung back to life with retro-cool restaurants and watering holes downtown that recall its industrial glory days.”
— Travel + Leisure, May 2016

“Buffalo’s development renaissance keeps rolling right along”
— The Buffalo News, January 31, 2016

“Millennials and young entrepreneurs are moving back to Buffalo as ‘re-pats,’ staking their claim by helping revitalize a place they once fled.”
— Chicago Tribune, March 29, 2016

“SolarCity gigafactory brightens New York’s manufacturing revival”
— cnbc.com, July 19, 2016
“You can find more people on the Buffalo waterfront today than you could in its heyday when it was the grain-handling capital of the world.”
—The Vancouver Sun, February 25, 2016

“Entrepreneurial Spirit Is Driving Buffalo Forward”
—The Huffington Post, June 11, 2015

“A $1 billion commitment . . . from Gov. Andrew M. Cuomo and a comprehensive planning process have helped spur the renaissance and reduce the region’s unemployment rate to . . . the lowest since 2007 . . .”

“Buffalo no longer just shuffling along”
—The Globe and Mail, March 21, 2016

“. . . Buffalo is thriving proof that it takes a team for a city to rise.”
—Huffington Post, September 19, 2015

“You can find more people on the Buffalo waterfront today than you could in its heyday when it was the grain-handling capital of the world.”
—The Vancouver Sun, February 25, 2016

“For anyone who hasn’t been to Buffalo in a few years, it hits you like a sledge hammer.”
—ESPN.com, January 22, 2015
The Buffalo Billion and the story of Buffalo Niagara’s rebirth.

**BILLIONS IN TRANSFORMATIVE INVESTMENTS**

Governor Andrew M. Cuomo’s billion dollar investment in the Buffalo Niagara economy is working because it reinforces the community-driven strategies to turn the region’s economy around and ensure a bright, sustainable future. It is transformative because it bolsters public and private investments which are aligned with the strategies shown to propel Buffalo Niagara’s economy forward. $350M has been invested to redevelop Buffalo’s waterfront into a year-round cultural destination with recreational, retail, and hotel assets. $1.4B has been invested in the Buffalo Niagara Medical Campus to create a world-class health and life sciences innovation district. Downtown Buffalo is experiencing $1.23B in redevelopment projects, which have been further complemented by over $100M in infrastructure improvements that are transforming the city into a walkable, bike-friendly, attractive, and sustainable place that connects people with each other, services, amenities, recreation and jobs. $250M has been invested in the clean-up of the region’s fresh water resources to restore and preserve these most treasured assets. The City of Niagara Falls has seen $400M in investments to Niagara Falls State Park, its downtown, and the infrastructure that connects the city to the waterfront. Billions more have been spent on business attraction, venture capital, and workforce training. Together, these investments are creating the foundation to build a sustainable economic future.

**MILLIONS OF PERSISTENT PEOPLE**

Buffalo Niagara is 1.1 million people strong. The regional economy boasts over 534,500 jobs, up 3% since 2011. More than 85,800 students attend the region’s colleges and universities—gaining the knowledge to fuel the workforce pipeline for jobs in high-growth sectors of the economy. These job opportunities, combined with investments in attractive and affordable quality of life amenities, are helping to retain college students and increase the metro’s young adult population by over 8% since 2010—reversing the decades-long trend of young adults leaving the region. Buffalo Niagara is a community of entrepreneurs with start-ups (businesses less than five years old) making up 16% of all businesses. Visitors attracted to Buffalo Niagara by tourism, fueled by the 9M people who visit Niagara Falls State Park, are also pivotal to driving the economy forward. In 2015, visitors spent $2.3B at the region’s restaurants, hotels, and enhanced tourism attractions. Behind every number there’s a person, using skills, knowledge and experience to increase productivity and grow innovation.
THOUSANDS OF INNOVATIVE IDEAS

New products. New processes. New breakthroughs. New ideas. In short, innovation fuels a 21st century economy. Through greater collaboration and support for entrepreneurs, Buffalo Niagara is building on the strength of its 21 colleges and universities that generate $343.6M in research and development dollars to bring new ideas to market. By facilitating the development of 9M square feet of research and clinical space on the Buffalo Niagara Medical Campus, the region is building the infrastructure to encourage knowledge exchange and to grow new ideas into commercially viable products. The region is attracting innovative ideas through policies and programs such as START-UP NY, which attracted 72 new companies, and 43North, which in three competition rounds named 29 winners and awarded $14.6M. The region developed a strategy for breathing new ideas into existing ventures through Buffalo Manufacturing Works, which grew its membership to 21 companies in just one year. New ideas aren’t just about growing new businesses; the region also has new ideas about what it aspires to be—from transforming the region through sustainable infrastructure and transportation, to reconnecting citizens with the waterfront, to putting former industrial land back to productive use.

HUNDREDS OF UNIQUE PLACES

Buffalo Niagara has always been defined by its unique geographic location on the international border with Canada, and at the confluence of two Great Lakes; by its incomparable art and architecture, core urban centers, rich history as a center of manufacturing, prime agricultural land, and natural assets. By building on these strengths, Buffalo Niagara made tremendous investments in the places that attract a skilled workforce, entrepreneurs and visitors. There are new places for people to explore like Canalside; old places that have been preserved and given new life like the Richardson Olmsted Complex; exciting places that people want to visit like Frank Lloyd Wright’s Darwin Martin House; natural places, like the Outer Harbor, where people seek refuge and recreation; and innovative places, like the Larkin District, where people want to work. With 1,700 residential units currently in the pipeline, downtown Buffalo is now a place where people want to live. New hotels, restaurants and breweries are springing up all over the city like never before. Emerging neighborhoods and commercial districts are beginning to provide high-quality housing, services, jobs and amenities. Through investments in sustainable infrastructure and multi-modal transportation on major thoroughfares like Niagara Street, Main Street and Ohio Street, people are better connected to these places. The City of Niagara Falls has become a place where people want to stay for an extended period of time. It added 800 new and upgraded hotel rooms, and hundreds more are on the way. Buffalo Niagara embraces placemaking as an economic driver that is unlocking growth potential unseen in decades.
Buffalo Niagara’s economy is growing. In fact, it is experiencing the longest sustained private sector job growth in 25 years. This is in part due to public sector investments in targeted industry sectors like Advanced Manufacturing, and Health and Life Sciences and Tourism, that jump started the economy and helped the private sector create jobs. The Buffalo Niagara economy is also more diverse than ever before, boasting a mix of manufacturing and service-based industries, and an industry composition that mirrors the nation. Buffalo Niagara produced $56.5B in goods and services in 2015, ranking the region in the top 15% of all metros across the U.S. And, with exports from the region valued at $7.11B, Buffalo Niagara is becoming more global than ever before. Today Buffalo Niagara is home to international companies, which include General Motors, FedEx, Geico, IBM, Delaware North, New Era, Moog, Rich Products, SolarCity, Praxair, Ford, Astronics, General Mills, and Yahoo. These and many others chose to relocate or remain in Buffalo Niagara because of its strategic location, skilled workforce, access to low-cost energy and supply chain network.

Buffalo Niagara has seen economic growth and community transformation through targeted, strategic public and private investment.

These investments have proven successful because they were based on objective data collection and analysis; they garnered community support through a collaborative and inclusive process; and they were designed around a set of strategies—developed in a holistic way—that built on unique regional strengths while addressing weaknesses.

Buffalo’s waterfront is becoming a must-see destination for residents and tourists.

Buffalo Niagara produced $56.5B in goods and services in 2015.

534,523 jobs in Buffalo Niagara, up by 3% since 2011.
Buffalo Billion

Using these proven strategies and a track record for successful implementation, Buffalo Niagara is ready to continue its momentum with a comprehensive plan for Phase II of the Buffalo Billion. The region brings forward home-grown initiatives with clear, attainable goals and smart implementation plans that will result in the biggest impacts for the region.
Key indicators show Buffalo Niagara is headed in the right direction.

Buffalo Niagara’s economic strategies continue to propel a rebound. Key indicators point to a growing and increasingly vibrant regional economy, with more jobs and firms and greater productivity than just a few years ago.

**Gross Metropolitan Product**

Buffalo Niagara’s GMP increased by $4.2B since 2011. The region’s economy is smaller than the metros shown, but growing faster than Cleveland and Pittsburgh.

<table>
<thead>
<tr>
<th>2011</th>
<th>2015</th>
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<tr>
<td>$52.3B</td>
<td>$56.5B</td>
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**Jobs**

Buffalo Niagara has been growing jobs for six consecutive years, including over 14,000 jobs added since 2011.

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<thead>
<tr>
<th>2011</th>
<th>2015</th>
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<tbody>
<tr>
<td>520,336</td>
<td>534,523</td>
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**Total Wages**

The total payroll in Buffalo Niagara increased by $1.6B from 2011 to 2015, after adjusting for inflation.

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<thead>
<tr>
<th>2011</th>
<th>2015</th>
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<tbody>
<tr>
<td>$22.6B</td>
<td>$24.2B</td>
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</table>
Firms

Since 2011, Buffalo Niagara added 945 firms. This equates to a 3.3% increase, which is notably higher than the similar metros shown, some of which have lost firms over recent years.

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<thead>
<tr>
<th></th>
<th>2011</th>
<th>2015</th>
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<tr>
<td>Buffalo Niagara</td>
<td>28,244</td>
<td>29,189</td>
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</table>


Average Annual Wages

Average annual wages in the region increased by nearly $2,000 since 2011, after adjusting for inflation. This raise is on par with the U.S. and higher than a similar metro.

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<thead>
<tr>
<th></th>
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<th>2015</th>
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<tbody>
<tr>
<td>Buffalo Niagara</td>
<td>$43,406</td>
<td>$45,267</td>
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Exports

The value of the region’s annual exports increased by over $270M since 2011. This represents a 3.9% increase, which is lower than the national increase but greater than comparable metros.

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<tr>
<th></th>
<th>2011</th>
<th>2015</th>
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<tbody>
<tr>
<td>Buffalo Niagara</td>
<td>$6.84B</td>
<td>$7.11B</td>
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Young Adult Population

Despite a small overall population increase, the number of young adults (age 20-34) in Buffalo Niagara increased by more than 8% since 2010—more than any other metro shown.

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<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
</tr>
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<tbody>
<tr>
<td>Buffalo Niagara</td>
<td>214,838</td>
<td>232,665</td>
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</tbody>
</table>

Buffalo Niagara’s regional strategies align with state priorities.

Economic development means investing in **placemaking**, **innovation**, **workforce** and **tradable sectors**.
Tradable Sectors

Workforce

Prepare Our Workforce

The economic impacts of strategic investments are felt across the community.
Strategies for a New Buffalo.

**Revitalization & Smart Growth**

**PHASE I**
- Better Buffalo Fund
- Northland Corridor
- Buffalo Harbor State Park
- Outer Harbor Access & Activation

**PHASE II**
- East Side Revitalization
- Scajaquada Boulevard
- The Buffalo Blueway
- Outer Harbor Phase II
- The Erie Street Waterfront Connection
- DL&W Canalside-Cobblestone
- Light Rail Extension
- Buffalo Train Station
- Better Buffalo Fund Phase II
- Bethlehem Steel Site Redevelopment
- Downtown Revitalization Initiative

**Innovation & Entrepreneurship**

**PHASE I**
- 43North
- Visual Effects Program
- Buffalo Information Technologies Innovation & Commercialization Hub

**PHASE II**
- 43North Phase II
- The Innovation HUB

**Workforce**

**PHASE I**
- Western New York Workforce Training Center
- Burgard High School Advanced Manufacturing Program

**PHASE II**
- Workforce Development Fund
- Say Yes Buffalo

Informed by community input, detailed research and analysis

2011

NYS Regional Economic Development Councils are formed

Strategy for Prosperity wins $100M for WNY

DRAFT

In Western New York

A strategy for WNY Regional Economic Development

Strategic Plan

November 2011

Informed by community input, detailed research and analysis

PROCESS
2012
Buffalo Billion Phase I announced

2012-2016
Implement Buffalo Billion Phase I

2017
Buffalo Billion Phase II
REDC Awards

PHASE I
Buffalo Manufacturing Works
High-Tech Innovation Hub at Riverbend

PHASE II
Strategic Investments & Incentives
Buffalo Manufacturing Works Phase II

TRADABLE SECTOR
Advanced Manufacturing

PHASE I
Riverway and Niagara Gorge Corridor
Wonder Falls Resort
Hotel Niagara
Niagara Falls Parks Programming

PHASE II
Strategic Investments & Incentives
Niagara Falls Redevelopment
Frank Lloyd Wright’s Legacy
National Comedy Center
Visitor Welcome Center
Marketing Buffalo Niagara

TRADABLE SECTOR
Tourism

PHASE I
Buffalo Institute for Genomics
John R. Oishei Children’s Hospital
Athenex
Albany Molecular Research Inc.

PHASE II
Strategic Investments & Incentives
University at Buffalo Jacobs School of Medicine and Biomedical Sciences

TRADABLE SECTOR
Health | Life Sciences
EXECUTIVE SUMMARY

Welcome to the New Buffalo.

Key indicators tell us Buffalo Niagara is looking up.

Revitalization & Smart Growth

Why It’s Important

The Buffalo Niagara metropolitan area sprawled as its population declined. By building on the region’s unique assets—its people, natural resources, and historic commercial corridors and neighborhoods—the revitalization strategy focuses on repairing deteriorated urban fabric, revitalizing neighborhoods and investing in Buffalo’s diverse communities.

A Look at Phase I

The Better Buffalo Fund invested more than $20M in transit oriented development and commercial corridor revitalization. The Northland Corridor is re-creating a manufacturing and employment hub on the East Side of Buffalo. The region created the City of Buffalo’s first State Park, Buffalo Harbor State Park; and improved access and activation in Buffalo’s Outer Harbor.

What’s Next in Phase II

East Side Revitalization will focus on three strategic pillars: 1) reinforcing core, neighborhood based, historic assets 2) infrastructure and small business improvements through commercial corridor redevelopment, and 3) placemaking around the Northland Corridor, to solidify a strong employment, innovation and workforce training center on the East Side. The new Scajaquada Boulevard will convert the existing expressway into an urban boulevard consistent with the context of the historic Delaware Park.

Leveraging the $100M Buffalo River cleanup, the Buffalo Blueway will create a network of access and recreation, to re-brand from Rust to Blue. Expansion of recreational opportunities along the Outer Harbor will present the opportunity for light, fast affordable activation of the Lake Erie waterfront. The Erie Street Waterfront Connection will re-join downtown and the waterfront by consolidating unconnected public spaces into a single linear public space along a shared, multi-use path.

The DL & W Canalside-Cobblestone project will activate the river’s edge at Canalside by extending rail service and creating a new destination on the waterfront. Light Rail Extension expands the NFTA Metro Line greatly enhancing connectivity between population centers and jobs in the City of Buffalo, Tonawanda, Amherst and all three University at Buffalo campuses. A new Buffalo Train Station will replace the current Exchange Street Amtrak station. And, The Better Buffalo Fund will continue making key revitalization investments throughout Buffalo.

Beyond Buffalo, the redevelopment of the Bethlehem Steel site continues to transform the 1,000 acre site in Lackawanna into a modern industrial park. And the region’s Downtown Revitalization Initiative will transform downtown cores in cities, towns and villages.
Innovation & Entrepreneurship

Why It’s Important

Buffalo Niagara needs to catalyze innovation to spur entrepreneurial activity. The region is beginning to rebound after decades of out-migration, limited venture capital activity, and weak small business growth. In recent years, the region is gaining momentum in a diverse range of Science, Technology, Engineering and Math-intensive industries that drive innovation, employ more workers and pay higher wages.

A Look at Phase I

In Phase I, the Buffalo Billion invested in three areas to boost innovation and entrepreneurship. 43North, the biggest business plan competition in the nation, is generating new business ventures and attracting venture capital. The Visual Effects Program connected Daemen College with Empire Visual Effects to train students in the post production and film industry. Buffalo Information Technologies Innovation & Commercialization Hub is creating a new innovation IT Hub with IBM, bringing cutting edge software jobs to downtown Buffalo.

What’s Next in Phase II

In Phase II, the region will continue the investment in 43North to attract the best start-ups from around the world and supply a steady stream of eight to 12 new companies annually. The Innovation HUB will be a comprehensive network of entrepreneurial support, leveraging the extensive resources of partner organizations, University at Buffalo, 43North, Roswell Park Cancer Institute and the Buffalo Niagara Campus, to accelerate the growth of life sciences and technology start-ups.

Workforce

Why It’s Important

Each year, thousands of job openings will be available to workers at all education levels. Employers need help to rapidly identify pools of skilled workers and training programs that meet their needs. Buffalo Niagara seeks to prepare an appropriately skilled workforce to meet labor needs while addressing the barriers to economic self-sufficiency for the region’s unemployed and underemployed populations.

A Look at Phase I

In Phase I, Buffalo Billion invested in two major initiatives to plan for workforce challenges. The Western New York Workforce Training Center, an anchor institution for the Northland Corridor, is an industry driven public-private collaborative with a comprehensive model to build the workforce for manufacturers. The Burgard High School Advanced Manufacturing Program is creating the pipeline for the future of manufacturing with students taking courses in machining, welding and the automotive trades.

What’s Next in Phase II

A new Workforce Development Fund will ensure the pipeline for workforce is keeping up with industry demands. The fund will promote and invest in innovative approaches to workforce training for underserved populations by helping to scale-up organizations doing high-impact, results-oriented workforce training. Say Yes Buffalo will continue to strengthen the regional workforce pipeline by offering unprecedented educational opportunities for an entire generation of Buffalo Public School students.
Advanced Manufacturing

Why It’s Important

Manufacturing is a tradable sector with opportunity for growth, reversing the decades-long trend of manufacturing decline. Today the industry accounts for 10% of jobs and over 60% of the region’s exports. While many large manufacturing firms are anchored in the region’s urban cores, most manufacturing firms are small in size. The strategy proposes accelerating growth in advanced manufacturing segments with the highest potential and overall improving manufacturing competitiveness sector-wide by promoting innovation and new technologies.

A Look at Phase I

Buffalo Manufacturing Works is a member-based, state-of-the-art facility in downtown Buffalo that is creating an ecosystem to help manufacturers with new technologies, expand into new markets and improve productivity and stimulate innovation and growth in the sector. The Buffalo High-Tech Innovation Hub at Riverbend is the investment in the 1.2M square foot home of the Solarcity GigaFactory. The facility will be the largest in the western hemisphere, producing more than one giga-watt of annual solar capacity and approximately 10,000 solar panels when it reaches full production.

What’s Next in Phase II

Strategic Investments & Incentives will create public-private partnerships with companies in advanced manufacturing. Funding will allow the region the opportunity to pursue new transactions that generate significant private investment, and encourage growth of existing large, regional companies. Building on the success of Phase I, Buffalo Manufacturing Works will accelerate the growth of small- and medium-sized manufacturers, develop a loan fund, and expand its capacity to deliver a full suite of services tailored to the needs of Buffalo Niagara manufacturers. To facilitate this growth, EWI will move the Buffalo Manufacturing Works operation to the Northland Corridor to customize a facility that integrates partnerships and serve as an anchor tenant for the new commerce park. Finally, EWI will expand its program to become the Advanced Manufacturing STEM Learning Lab, helping to grow the region’s advanced manufacturing workforce pipeline.

Tourism

Why It’s Important

Despite strong tourism assets, Buffalo Niagara is not fully capturing its tourism opportunity. Niagara Falls attracts more visitors than most national parks, but small proportions of visitors to the Falls stay overnight due to relatively limited programming, accommodations and dining options. Other areas of the region, including asset-rich Buffalo, do not capture the opportunity presented by the millions of Niagara Falls visitors. The strategy encourages investing in the region’s major tourism attractions and amenities, and enhancing programming to encourage longer stays and increased spending by visitors.

A Look at Phase I

Tourism Phase I investments focus on connecting the water and the City of Niagara Falls, and improving the visitor experience with new developments and programming. The Riverway and Niagara Gorge Corridor, the most transformative infrastructure project in Niagara Falls in decades, removes the barriers of limited access expressways along the Upper Niagara River and Niagara Gorge. The Wonder Falls Resort is the redevelopment of the former Rainbow Centre Mall into a locally themed entertainment complex; and Hotel Niagara will see a complete restoration transforming the historic landmark to expand quality lodging and retail opportunities. Niagara Falls Parks Programming will create outdoor recreational offerings to increase visitor stays.

What’s Next in Phase II

Strategic Investments & Incentives will create the infrastructure, asset development and products to grow new opportunities for major tourism drivers. Continued Niagara Falls Redevelopment will include the acquisition of key underutilized properties and ecological restoration of the Niagara Gorge. Phase II investments will ensure Frank Lloyd Wright’s Buffalo Legacy through the completion of the full restoration of two masterpieces. The National Comedy Center will be a major cultural destination putting Jamestown on the international stage. And, the Visitor Welcome Center will serve the growing tourist population, while expanded marketing initiatives will ensure Buffalo continues attracting visitors, businesses and workers.
Why It’s Important

Buffalo Niagara has significant health and life sciences assets to generate a commercial impact. These industries are growing specializations for the region that provide the local workforce with high-paying jobs. The region invested heavily in health care and life sciences, especially in the Buffalo Niagara Medical Campus to co-locate clinical with research and development functions to foster collaboration. Buffalo Niagara needs to accelerate commercialization and grow businesses in the region by supporting and enabling innovation, translation and commercialization of research in high impact and growth areas.

A Look at Phase I

The Buffalo Institute for Genomics is combining the research and development strengths of University at Buffalo and the New York Genome Center to make upstate a leader in genomic medicine. The John R. Oishei Children’s Hospital, the only comprehensive pediatric healthcare facility in Buffalo Niagara, will open in 2017. Athenex, a global specialty oncology pharmaceutical company, is now headquartered in Buffalo and will focus on next generation cancer therapies. Albany Molecular Research Inc. is helping companies and scientists take drug therapies from lab to the clinical-trial stage.

What’s Next in Phase II

Strategic Investments & Incentives will engage business attraction opportunities to advance the health and life sciences regional agenda targeted at initiatives that increase partnerships between academia and industry, and facilitate the collaboration of research and development to spur commercialization activities. Investment in University at Buffalo’s Jacobs School of Medicine and Biomedical Sciences will further establish UB’s downtown presence and enable interdisciplinary collaboration leading to cutting edge treatments and spin off investment activity.

Regional Economic Development Council Award

Investments will continue the successful work of the Western NY Regional Economic Development Council, funding projects that align with the region's strategies.

In 2011, WNY was sprawling without growth.

Now we are focusing investments and transforming places.

In 2011, we were not supporting enough entrepreneurs.

Now we are growing them by the dozen.

In 2011, we needed to expand and diversify our workforce.

Now we are building the pipeline for the future.

In 2011, we had a legacy of manufacturing.

Now we are innovating to compete in the future.

In 2011, we were attracting visitors but they didn’t stay long.

Now we are investing in destinations where one day isn’t enough.

In 2011, we had the foundation for health and life sciences.

Now we are doubling down on the cluster.

We can see the transformation in the people, places and sectors we’re investing in.
<table>
<thead>
<tr>
<th>Revitalization &amp; Smart Growth</th>
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<tbody>
<tr>
<td>East Side Revitalization</td>
<td>$60M</td>
</tr>
<tr>
<td>Scajaquada Boulevard</td>
<td>$30M</td>
</tr>
<tr>
<td>The Buffalo Blueway</td>
<td>$10M</td>
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<td>The Erie Street Waterfront Connection</td>
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<th>Innovation &amp; Entrepreneurship</th>
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<tbody>
<tr>
<td>43North Phase II</td>
<td>$25M</td>
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<tr>
<td>The Innovation Hub</td>
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<td>Workforce</td>
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<td>Workforce Development Fund</td>
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<td>Say Yes Buffalo</td>
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<td>National Comedy Center</td>
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<td>Visitor Welcome Center</td>
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<td>Marketing Buffalo Niagara</td>
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<th>Life Sciences</th>
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<tr>
<td>University at Buffalo Jacobs School of Medicine and Biomedical Sciences</td>
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| Regional Economic Development Council Award                  | $70M     |

**Buffalo Niagara’s Strategic Plan for Prosperity**

**JANUARY 2017**