

An aerial photograph of Buffalo, New York, showing the Buffalo Marine Museum lighthouse in the foreground on the right. The lighthouse is a tall, white, tapered tower with a black lantern room and a green dome. In the middle ground, a red boat with a white cabin is on the water. The background features a city skyline with various buildings and a marina with many sailboats. The text "MARKET DEMAND STUDY FOR THE CRUISE INDUSTRY IN BUFFALO" is overlaid in large white letters on the left side of the image.

MARKET DEMAND STUDY FOR THE CRUISE INDUSTRY IN BUFFALO

Open House

June 22, 2023

Introduction



- In August, 2022, NY Governor Hochul announced accelerated funding to redevelop Buffalo's waterfront, focusing on several key projects:
 1. Increase pedestrian waterfront access and recreation
 2. Provide road and safety improvements to create waterfront parkways
 3. Invest \$87 million in the DL&W Terminal for a new commercial activity center and metro rail station
- This plan builds on Erie Canal Harbor Development Corporation (ECHDC)'s work over the past decade to restore 21 historic acres at Canalside and 200 acres along the Outer Harbor.
- ECHDC is tasked with developing and implementing the Governor's vision of a redeveloped Buffalo waterfront to attract people and businesses.

Cruise Study & Strategy Goals



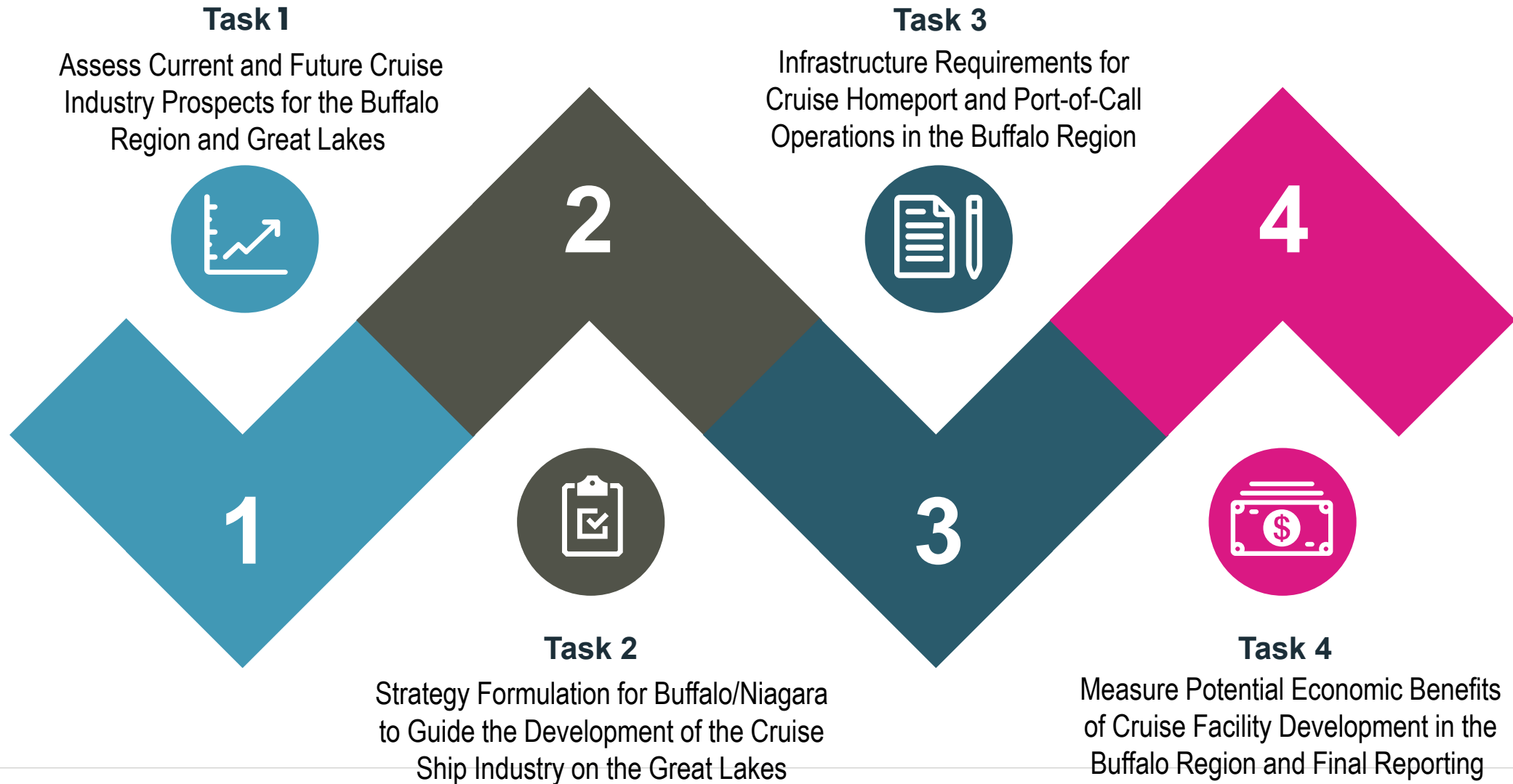
Assess market potential and measure anticipated economic benefits associated with cruising to the Buffalo Region.

Establish a strategy involving physical, operational, and marketing investments to maximize available market and economic opportunities.



Our Approach

Methodology



Task 1 – Market Assessment

Explore the Great Lakes

YOUR GREAT LAKES EXPERIENCE IS ON THE HORIZON.

THE GREAT LAKES REGION

1. LAKE ONTARIO
2. LAKE ERIE
3. LAKE HURON
4. LAKE SUPERIOR
5. LAKE MICHIGAN

A. BUFFALO, NEW YORK
B. CLEVELAND, OHIO
C. DETROIT, MICHIGAN
D. MACKINAC ISLAND, MICHIGAN
E. SAULT-STE MARIE, MICHIGAN
F. THUNDER BAY, ONTARIO
G. DULUTH, MINNESOTA
H. MUSKOGON, MICHIGAN
I. HOLLAND, MICHIGAN
J. MILWAUKEE, WISCONSIN

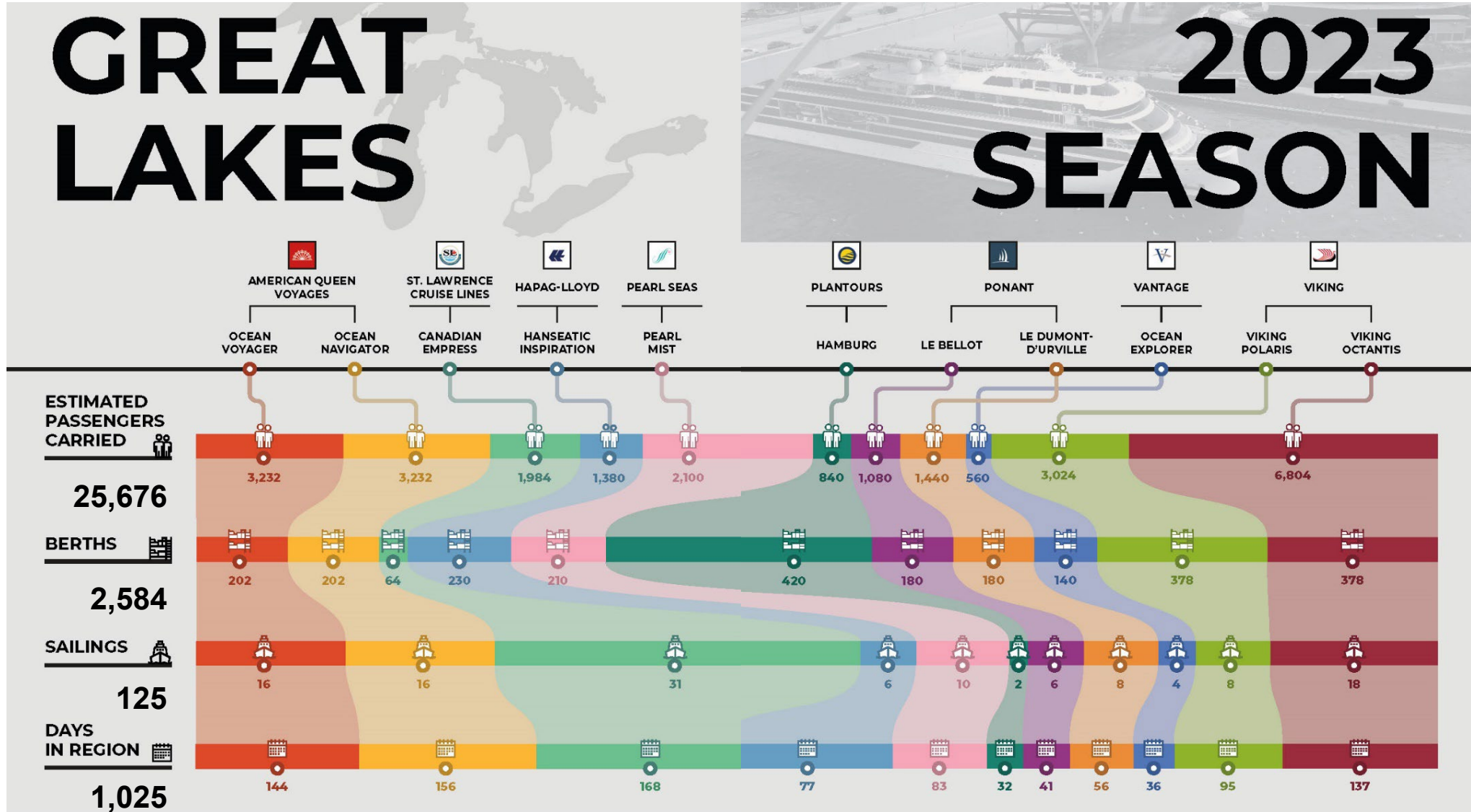
FIVE GREAT LAKES. ONE GRAND ADVENTURE.

PORTS & OTHER PARTNERS.

- visit detroit
- visit Cleveland
- PORT CLEVELAND
- THUNDER BAY
- DULUTH
- MACKINAC ISLAND TOURISM
- visit Muskegon
- MUSKOGON LAKESHORE Chamber of Commerce
- Sault Ste Marie PURE MICHIGAN
- DECC
- visit Milwaukee
- PORT Milwaukee
- Buffalo



Cruising the Great Lakes



Formulate Strategy

2



Task 2

Strategy Formulation for Buffalo/Niagara to Guide the Development of the Cruise Ship Industry on the Great Lakes



Marketing and Promotion

Goals, 1-, 2-, 5-Year Action Plans



Regional Partnerships

Goals, 1-, 2-, 5-Year Action Plans



Business and Investment

Goals, 1-, 2-, 5-Year Action Plans, Grants and Funding

Task 3 – Destination Infrastructure

Task 3 Infrastructure Requirements for Cruise Homeport and Port-of-Call Operations in the Buffalo Region



3

1

Design Day

Who are we designing for? What is the consumer makeup?

What sizes of cruise vessels arrive to the destination? When do they arrive? What percentage of guests leave the ship? How quickly do guests disembark? How long are they at the destination?

Do all guests stay at the destination? Is the destination open to non-cruise guests?

2

Site Features

What is total size of the destination? What areas are available for development? What areas must be preserved?

Where can we develop in-water infrastructure in support of cruise operations? What water depths are present? How can we avoid dredging and environmental impacts to submerged ecologies?

Where are our main sightlines? Topography? Vegetation? Heritage and cultural zones?

3

Access

How are cruise vessels / tenders accommodated at the site? How long does it take to get guests from the ship to the destination?

What is the arrival experience and sequence? How do guests move through the site? Are districts walkable? Are transit elements provided? Do guests leave the site? How do landside and in-water excursions work?

How do provisions and site supplies arrive to the destination?

4

Amenity

What do guests do at the destination? What is their 'base camp'?

What are the venues and amenities? How are natural features incorporated into delivery? What is the carrying capacity of these venues?

Where do guests eat and drink? What is the carrying capacity of these outlets?

How are these elements themed? What is the guest journey? What stories are we seeking to tell?

5

Support

All aspects of the destination require infrastructure and staff support.

What potable, wastewater, stormwater, power, communication, solid waste, maintenance, services roads, and other back-of-house elements are needed? Where are they best placed?

How is the destination staffed to accommodate the design day? What happens on non-cruise days?

6

Sustainability

New ways of solving old problems can have meaningful impact to make destinations more sustainable, more resilient, and less carbon intensive.

What types of renewable power systems can we support? How do we approach carbon neutrality? Carbon zero?

How do we contemplate sea level rise in destination planning? How do we add resiliency elements in our overall planning?

Task 3 – Destination Infrastructure

Task 3

Infrastructure Requirements for
Cruise Homeport and Port-of-Call
Operations in the Buffalo Region



3

Market Study will Help to Calibrate Destination Infrastructure

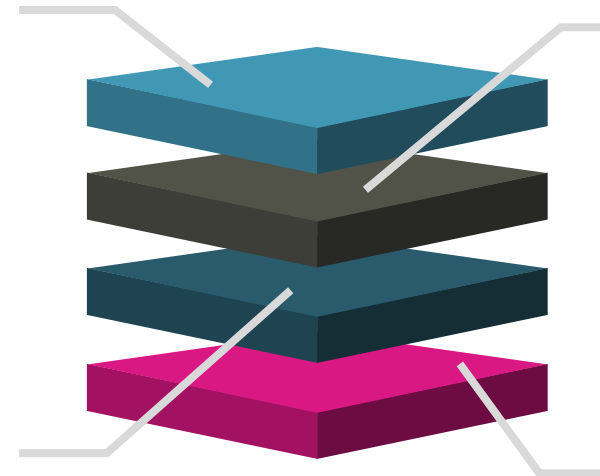
- Homeported Vessel(s)
- Stopover (Calling) Vessels
- Demand for Berth Space
- Vessel Sizes
- Vessel Frequency
- Multiple Vessels

Ground Transportation (GTA)

Bus and vehicle parking,
walking areas, other
functional zones

Disembarkation

Departing cruise guests
flowing from gangway, to
baggage hall, CBP, and
transportation services



Embarkation

Boarding cruise guests
flowing from transportation
services, to screening,
check-in, waiting, and
gangway.

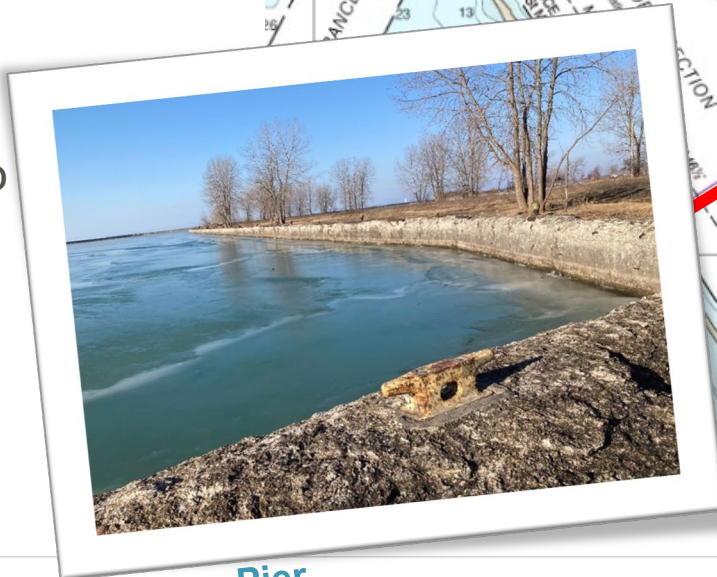
Provisioning

Baggage processing,
screening, stores
loading and unloading

Main Candidate Sites

What is needed?

- Vessel Accommodation
 - Navigable Approaches
 - Turning Basin
 - Space for Maneuvering
 - Breasting (Fender System)
 - Moorings
- Passenger Accommodations to Embark and Disembark Vessels
- Ground Transportation Areas and Logistical Elements



Michigan Pier

DL&W Terminal Site

Considerations for DL&W Terminal Site

- Narrowness of the River (Turning Basin)
- Vessel Maneuvering
- River Depth
- Structure Condition and Capacity
- Suitability for Deepening
- Standoff Berth
- Potential for Conflicting Uses



Michigan Pier

Considerations for Michigan Pier

- Spatially Unconstrained (~220' x 1,150' Pier)
- Deep Water
- Structure Condition and Capacity
- Less Sheltered
 - Wind
 - Surge & Seiche
 - Wave Climate
- Potential Costs
- Compatibility with Adjacent Development?



Task 4 – Measure Economic Impacts

4



Task 4

Measure Potential Economic Benefits of Cruise Facility Development in the Buffalo Region and Final Reporting



Construction Impact

\$\$, FTEs, Taxes



Operational Impact

\$\$, FTEs, Taxes

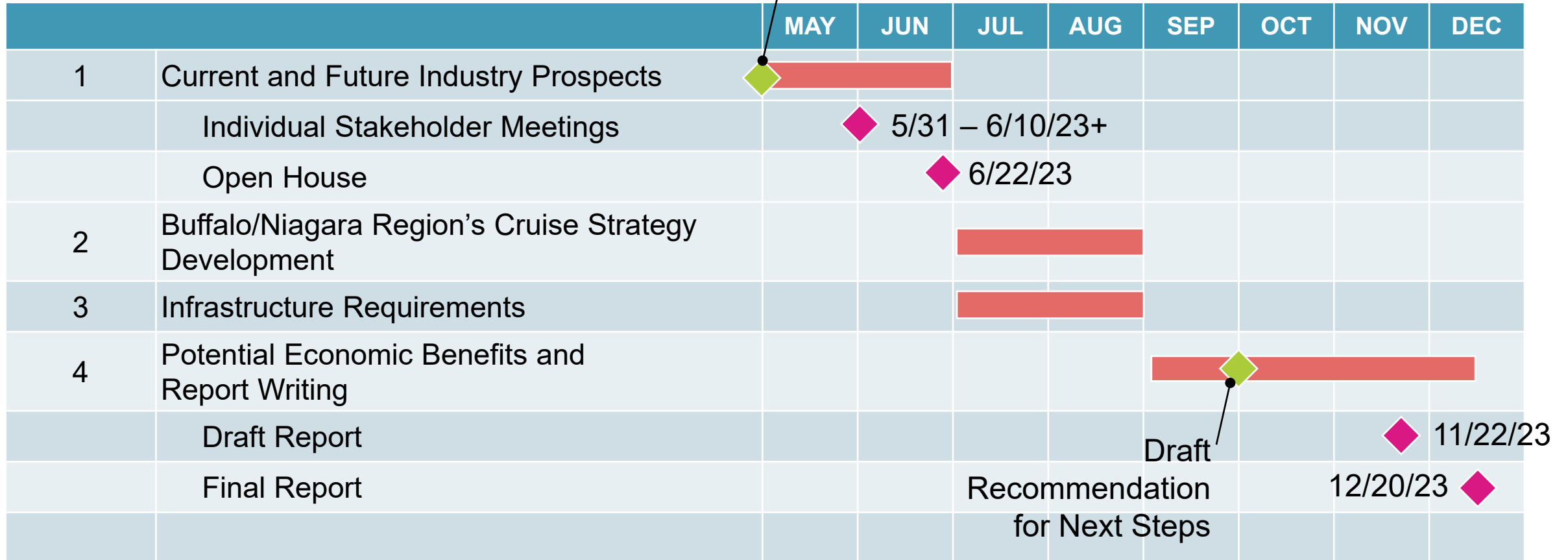


Other Economic
Development
Benefits

Qualitative
and Goodwill

Schedule

Project Kick-Off Meeting and Site Visit





What We Have Heard so Far...

Market Themes

Great Lakes cruising has bounced back from the Pandemic. People are eager to travel.

There's definite interest cruising in the Great Lakes. Adding Buffalo **would make a more complete Great Lakes region** and round it out for the passengers.

Some cruise lines are having more success than others in 2023. **Those with newer cabins (Viking) are doing well.**

Site Themes

The two proposed locations will have significant impact on the downtown economy. Both locations have strengths and weaknesses.

The State has put investment in Canalside and The Outer Harbor which has transformed the city. Popular consensus is these locations are great places to begin guest visits.

Locations need to support mixed and multiple uses given the seasonality of cruising.

Lessons Learned from Ports in the Region

Duluth, Cleveland, Milwaukee, and others are seeing growth and experiencing economic benefits.

Buffalo can play a role as both a **homeport and port-of-call.**

Start with defining and **understanding cruise operator and guest needs.**

What Are Your Thoughts?

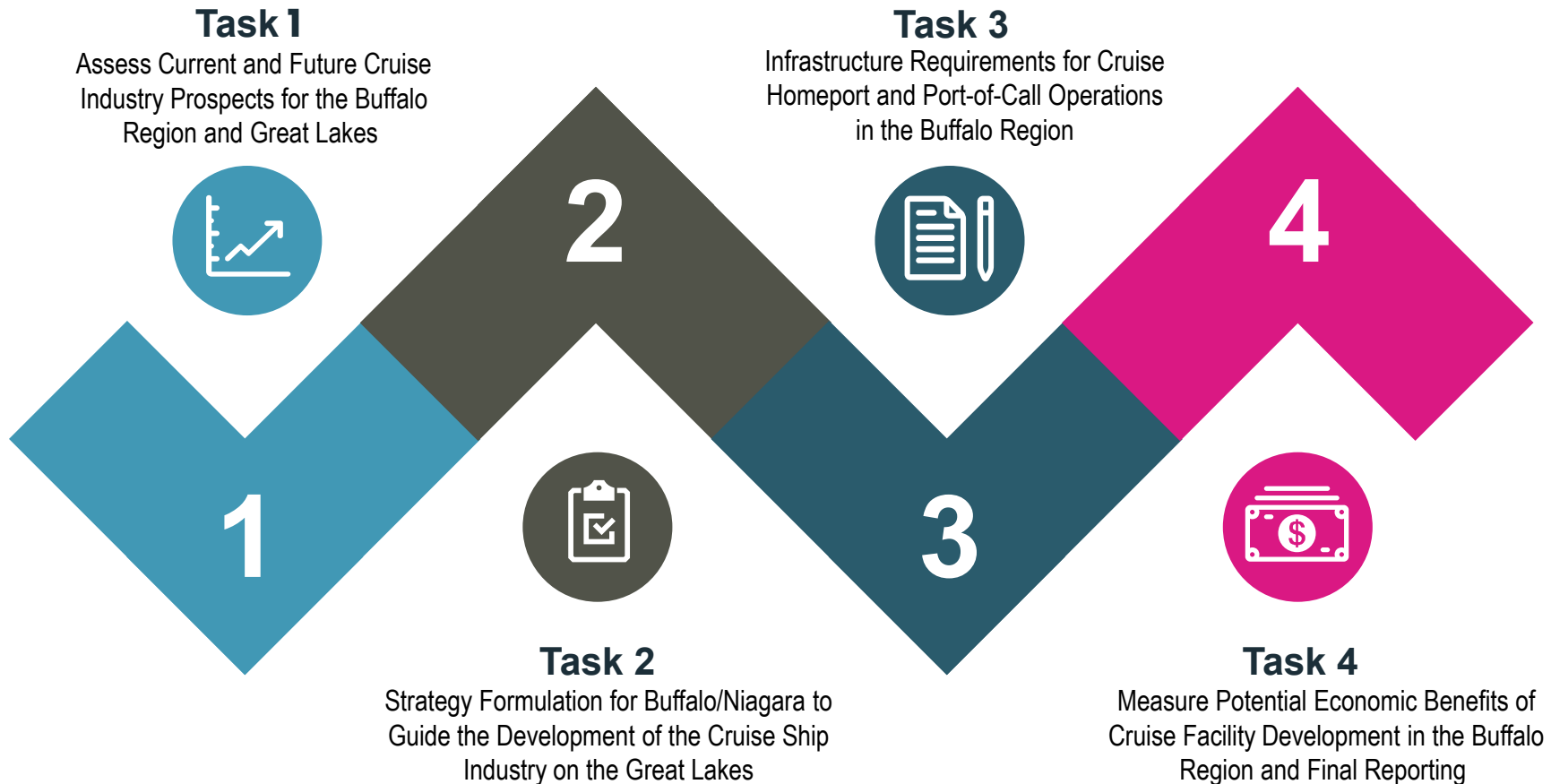
What makes
the Buffalo
Niagara Region
a great place
for cruising?

What should
guests see and
do in Buffalo?

What waterfront
locations are ideal
for cruise
operations?

Next Steps

Next Steps... Still Early in the Process



Stay connected by visiting the project webpage:

› <https://publicinput.com/buffalocruisemarketstudy>

Scan the QR code with your camera app to be directed to the project webpage.



An aerial photograph of the Buffalo waterfront. In the foreground on the right, the Buffalo Marine Museum lighthouse stands on a stone pier. The lighthouse is a tall, white, tapered tower with a black lantern room and a green glass-enclosed top. In the middle ground, a red boat with a white cabin is moving across the water, leaving a white wake. To the right, a white sailboat is visible. The background shows a dense urban skyline with various buildings and a marina with many sailboats. The water is a deep blue, and the sky is clear.

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