

Section III. Analysis of the Brownfield Opportunity Area

A. Community and Regional Setting

Broome County is located in the Southern Tier Region of New York State, which consists of the Triple Cities of Binghamton, Endicott, and Johnson City, as well as surrounding suburban and rural towns. The Endicott Johnson Brownfield Opportunity Area (BOA) is located in the central portion of Broome County at the municipal boundary between the City of Binghamton and the Village of Johnson City.

Broome County had a 2000 Census population of 200,536. This population is primarily concentrated in the Town of Union, including the Villages of Endicott and Johnson City (56,298 persons), and the City of Binghamton (47,380 persons). Outside of its urban core, Broome County's land use is primarily residential with a substantial amount of land area devoted to agriculture. The county experienced a 6.9% population loss between 2000 and 2005. This substantial population loss continues a general population decline that dates back to the 1970s. Broome County has lost over 20% of its population since the 1970s, and was ranked as the 13th slowest growing county in the U.S. between 1990-1999. Population loss has been concentrated within the urban core, with the City of Binghamton population declining by nearly 26% since 1970. Demographic indicators reveal that the Broome County population is aging: The median age of county residents increased from 38.2 to 40.1 between 2000-2005. In 2005, there were 81,402 total households Broome County. Average household size was 2.29 people per household, which was lower than the statewide average of 2.62 people per household.

In 2005, there were 88,915 Broome County housing units; 65.2% were owner-occupied, and 34.8% were rental housing units. The county had a 8.4% overall housing vacancy rate. Broome County's housing stock is aging: 61.5% of all residential structures were built before 1960. The cost of housing is relatively low in Broome County. The 2005 median residential value was \$84,100, much lower than the average statewide value of \$148,700 and the nationwide average value of \$167,500. According to the *BC Plan*, new housing activity slowed significantly during the 1990's: In the Binghamton Metro Area, almost 8,000 housing permits were granted during the 1980s, compared with only 3,700 during the 1990s. Sales of existing homes increased in frequency during the second half of the 1990s, but the average price of a single-family home simultaneously declined over this same time period. More recently, the average cost of an existing single-family home has rebounded, and housing values are comparable to values in the early 1990s. New housing is being constructed primarily in suburban areas surrounding the county's population centers. According to Broome County Construction Data, there were 190 new housing starts in 2005. Of these, only 3 (1.6%) were in the City of Binghamton and 4 (2.1%) were in the Village of Johnson City. The remaining 183 housing starts (96.3%) were located elsewhere in Broome County.

The Broome County region has specialized in manufacturing throughout much of its economic history. The Endicott-Johnson (E-J) Shoe Company was a major manufacturing anchor that occupied much of the study area from the 1890s to the 1960s, and employed some 24,000 workers at the company's peak. Following the E-J Company's decline and departure, many of its former industrial facilities stand underutilized and contribute to the study area's derelict character.

Technology manufacturing has played a major role in the region's economic development. IBM was founded in Binghamton during the 1920's, and companies such as Link Aviation, General Electric, and Universal have played significant roles in the local economy.

In 2000, manufacturing still accounted for 20.5% of all regional employment but, manufacturing activity has declined steadily in recent years. At its peak in the 1950s, manufacturing accounted for over 50% of Broome County employment. Since 1985, Broome County's manufacturing employment has declined by 40%; between 1990 and 2003, the Binghamton MSA lost approximately 16,300 manufacturing jobs.

During the Cold War and in following years, the defense industry played a pivotal role in the area's development. However, reduced spending and shrinking markets have forced some major defense industry employers to downsize or leave the area. The total value of defense contracts awarded in 1994 (\$343 million) was nearly four times the value of contracts awarded in 2002 (\$91.6 million). Since 2002, defense spending has increased, and Broome County procurements have rebounded to \$158 million in 2007.

Following is a list of the area's five largest employers, followed in parentheses by their number of employees: Lockheed Martin (4,000), New York State (3,600), United Health Services (3,100), Binghamton University (2,800), Broome County Government (2,500). Other major private-sector employers include Endicott Interconnect (1,800), IBM (1,450), and Amphenol Aerospace (1,400).

The *BC Plan* identifies a handful of industry clusters representing groups of similar firms that have been particularly successful in the area. Among these cluster industries are: computer equipment, electronics, utilities, health services, aerospace and defense, mass media, and food processing. Computer equipment and technology, communication services, food processing, health services, and biotechnology have been identified as "target industries" with potential to enter or expand their presence in the Broome County market.

In 2005, the Broome County labor force was estimated at 95,448. According to figures from the Bureau of Labor and Statistics (BLS), Broome County unemployment increased from 3.6% in 2000 to 4.8% in 2005. These unemployment rates are comparable to state and national rates. Over the same time period, New York State unemployment rose from 4.5% to 5.0%, and nationwide unemployment rose from 4.0% to 5.1%.

The 2005 per capita income for Broome County was \$21,728. Regional income growth has occurred more slowly than the growth observed nationally, per capita income in Broome County increased by 36% from 1990 to 1999, while U.S. per capita income rose by 46% over

the same time period. The 2005 median household income was \$36,394, approximately 74% of the New York State median household income and 79% of the national median.

Poverty rates have increased by 31% between 1989 and 2000, and remain relatively high compared to New York State and national standards. In 2005, 16.6% of Broome County individuals were below the poverty level, while 13.8% of New York State individuals and 13.3% of U.S. individuals were living below the poverty level.

In the 1990s, Broome County's educational attainment was on par with national averages. Eighty-three percent of the region's population has completed high school, and 23% hold a 4-year university degree. Dropout rates and SAT scores compare favorably to national averages.

The State University of New York at Binghamton enrolls over 12,000 undergraduate and graduate students, and Broome County Community College enrolls an additional 5,600 students. These institutions generate a pool of locally educated professionals, and the *BC Plan* recommends that future economic development planning should build upon the region's educational strengths.

Broome County electric and natural gas services are provided by New York State Electric and Gas (NYSEG). NYSEG serves over 40% of Upstate New York, and offers development programs to enhance the productivity and profitability of its business customers. These include operational needs assessments, flexible energy rates, regulatory consultation, and several incentive programs to promote regional business development.

In 2001, the Binghamton Regional Airport underwent a \$13.7 renovation that won the "Project of the Year" award from the New York State Chapter of the American Public Works Association. Binghamton Regional Airport has international capabilities provided by the U.S. Customs Office. Private, charter, corporate, freight, and commercial aircraft with international departures and destinations are able to receive customs clearances. Airlines serving Binghamton Regional Airport include U.S. Airways and U.S. Airways Express, Northwest AirlinK, United Express, CommutAir, and Continental Connection. Broome County is located at the intersection of two Interstate highways (I-81 and I-88) and a major state route (NYS Route 17). NYS Route 17 is scheduled to be upgraded to a federal Interstate 86, and this work is expected to bring \$3.2 billion in economic benefits to the region.

Location is one of Broome County's strengths, as its proximity to major northeastern markets and easy accessibility via highway make the county ideal for merchandise distribution operations and other industries that depend on contact with major urban markets. The Boston, New York City, Philadelphia, Baltimore, Washington DC, and Pittsburgh markets are all located within a 250-mile radius of Broome County. In addition to Broome County's excellent highways, the network of local roads provides low commute times for area workers. The average travel time during evening rush hour is 14 minutes, and transportation planners expect average travel times to decrease in the future.

B. Inventory and Analysis of Physical Conditions and Governing Regulations

1. Land Use

The proposed Brownfield Opportunity Area (BOA) covers a total 230 acres, of which approximately 172 acres are located in the Village of Johnson City and 58 acres are located in the City of Binghamton. *Figure III-1 Brownfield Opportunity Area Land Use Map* provides a categorized land use map showing the existing use of properties throughout the BOA, as classified in county parcel data.

Table III-1 Breakdown of Study Area Land Use			
Land Use	# Parcels	Acreage	Percent Coverage
Residential	119	17.1	10.4%
Single-Family	45	5.9	3.6%
2-3 Family	37	5.3	3.2%
Apartments (>3 units)	37	5.9	3.6%
Non-Residential	162	100.6	61.8%
Industrial	17	36.4	22.3%
Institutional	3	3.0	1.8%
Mixed-Use	69	8.4	5.2%
Office/Commercial	38	18.4	11.3%
Restaurants	4	1.7	1.0%
Retail	14	10.9	6.7%
Warehouse/Distribution	17	21.8	13.5%
Community Services	18	11.9	7.3%
Entertainment/Recreation	3	0.5	0.3%
Parks	4	6.2	3.8%
Religious	11	5.2	3.2%
Other	75	32.2	19.9%
Parking	34	8.2	5.1%
Utilities/Infrastructure	2	0.8	0.5%
Vacant	39	23.2	14.3%
Total Parcel Area	374	162	100%

Several large, vacant Endicott-Johnson (E-J) and other manufacturing plants are located in the BOA Study Area. These properties have deteriorated over years of inactivity, and now contribute to the area’s distressed character. Much of the BOA land surrounding the E-J

Industrial Spine was historically used to support plant operations, employees, and their families. In addition to the E-J facilities, the area includes a number of other industrial and distribution uses.

The Main Street corridor is lined with small retail shops, mixed-use properties, and small office buildings. The corridor is highly walkable, with on-street parking and urban-scale setbacks from the street. Land use surrounding the BOA is primarily residential. Within the BOA, most residential properties are concentrated between Arch Street and Lester Avenue in Johnson City, and south of Brown Street in the City of Binghamton. BOA residential properties were generally built in the early to mid-Twentieth Century, and most remain in fair to good condition.

Table III-1 Breakdown of Study Area Land Use provides acreage and percent coverage calculations for a number of land use categories within the BOA. Of the 230 acres located in the Study Area, the parcel data account for a total of 162 acres; the balance of land area is covered primarily by roadways and railroad rights-of-way.

The Study Area is dominated by commercial and industrial uses, and these uses define its character. Together, the industrial, office/commercial, and warehouse/distribution land uses occupy 72 parcels covering 76.6 acres, or over 47% of the BOA.

There are 69 mixed-use properties within the BOA, many of which combine upper-floor housing with ground-level retail or office uses. Mixed-use properties are located primarily along the Main Street corridor, providing a unique, traditional urban setting at the core of the Endicott-Johnson Industrial Spine.

Retail properties cover 10.9 acres of the BOA; nearly all of the Study Area's 14 retail properties are located along the Main Street corridor.

Residential properties account for 119 parcels within the BOA, covering a combined 17.1 acres or 10.5% of the land area. Of these residential properties, 45 are single-family homes, 37 are two or three-family homes, and 37 are apartments of more than 3 units. Housing is concentrated in the western portion of the BOA between Main Street and Corliss Avenue, and in the eastern portion of the BOA between Brown Street and Main Street.

Thirty-four BOA properties are classified as parking lots. Most of these parking lots are located near the large commercial/industrial parcels in the western portion of the project area.

There are 39 vacant parcels located within the BOA, most of which are quite small, covering 23.2 acres in total. While currently unoccupied, the largest vacant parcel – covering 13.4 acres of land south of CFJ Park in the northern portion of the Study Area – has been purchased by a private developer, and is the future site of a Walmart Supercenter. In the future, Walmart is expected to be a major retail attraction.

2. Zoning

Figure III-2 Brownfield Opportunity Area Zoning Map displays the various zoning districts located within the Study Area. City of Binghamton zoning applies to the eastern portion of the Study Area, which is located within City limits. Johnson City zoning applies to the portion of the BOA located within the Village of Johnson City.

The definitions of all zoning designations located within the Study Area bounds are as follows.

City of Binghamton Zoning Designations

- R-2, Residential One - Two Unit Dwelling: Designates areas with a mixture of one-unit dwellings, two-unit dwellings, and townhouses, to create a low-moderate density.
- C-1, Service Commercial: Designates areas for a mixture of commercial service, storage, and light industrial processing activities, of citywide or regional significance.
- C-4, Neighborhood Commercial: Designates those areas where general retail, service, and office activities provide convenience goods and services to several surrounding neighborhoods but generally not on a citywide or regional scale.
- I-2, Light and Medium Industrial: The intent of the I-2 district is to designate those areas suitable for light and medium industrial uses. The industrial character of the land is preserved by restricting incompatible uses.

Village of Johnson City Zoning Designations

- AC, Conservation Area: Applies to lands being conserved for uses requiring little land development, including agricultural uses, wildlife refuge, and public recreation.
- RM, Multiple Residential: Intended to promote assorted housing formats, including one-, two-, and multi-family, and apartment housing. Limited community-oriented commercial uses are permitted, but incompatible uses are restricted.
- CN, Neighborhood Commercial: Permits neighborhood-scale retail and commercial uses intended to complement residential uses in surrounding areas.
- CG, General Commercial: Permits various retail, commercial, and storage uses which may/may not be compatible with residential settings. Industrial uses are restricted.
- IN, Industrial: Designates areas for commercial, storage/distribution, and manufacturing.
- PD, Planned Unit Development: Permits the establishment of areas in which diverse uses may be brought together as a compatible and unified plan of development which is in the interest of general public welfare.

Table III-2 Study Area Zoning		
City of Binghamton Zoning		
<i>Designation</i>	<i>Acreage</i>	<i>% of Study Area</i>
C-1, Service Commercial District	10.3	6.0%
C-4, Neighborhood Commercial District	1.7	1.1%
I-2, Light and Medium Industrial District	26.0	15.2%
R-2, Residential One-and Two-Unit Dwelling District	1.9	1.1%
Village of Johnson City Zoning		
<i>Designation</i>	<i>Acreage</i>	<i>% of Study Area</i>
AC, Conservation Area	5.6	3.3%
CG, General Commercial District	43.2	25.2%
CN, Neighborhood Commercial District	0.9	0.5%
IN, Industrial District	60.5	35.3%
PD, Planned Unit Development District	3.1	1.8%
RM, Multiple Residential District	17.9	10.5%
TOTAL	171.2	100%

Table III-2 Study Area Zoning summarizes BOA zoning coverage by acreage and percentage of the Study Area. Please note that of the 230 acres located in the Study Area, the zoning data account for a total of 171.2 acres; the balance of land area is covered primarily by roadways and railroad rights-of-way.

Residential zoning covers only a small portion of the BOA, 1.9 acres in the City of Binghamton are zoned for one- and two-unit residential use, and 17.9 acres in the Village of Johnson City are zoned for multi-unit residential use. Approximately 3 acres of land in the southwestern corner of the Study Area is zoned PD, as part of a planned development district. The remaining 142.7 acres, or 83.4% of the BOA, is zoned for either commercial or industrial uses.

Commercial zoning covers 56.2 acres, or 32.8%, of the BOA. While there are some differences between municipal codes and commercial designations, the commercial districts generally emphasize retail and office uses but not industrial uses. In the Johnson City CG (General Commercial) district between Lester Ave. and North Arch Street, the Main Street corridor is lined by retail and mixed-use properties. Much of the Johnson City CG district is covered by residential uses in the blocks surrounding Main Street.

Approximately half of the BOA (86.5 acres) is zoned for industrial uses, reflecting the area’s manufacturing roots. In the City of Binghamton, I-2 zoning lines the railroad tracks to the north of Main Street. Industrial zoning extends westward into Johnson City, where the IN designation covers the Olum’s and Broome-Tioga ARC sites. The 59 Lester Avenue property located north of Main Street is zoned General Commercial (CG). The future Walmart site immediately north of the railroad tracks is zoned for industrial use.

The area south of the Goodwill Theatre, which includes several large-scale, underutilized industrial properties that will be discussed at length throughout this report, is currently zoned for industrial uses.

CFJ Park is a designated 5.6 acre conservation area, and is zoned AC.

3. Land Ownership

Approximately 15.6 acres of BOA land are publicly owned; *Figure III-3 E-J BOA Land Ownership, Historic Sites, and Public Parks* identify these public properties. CFJ Park is owned by the Village of Johnson City, and covers a total of 5.6 acres. The Johnson City Village Hall is located at 253 Main Street. Along Main Street, the Village of Johnson City owns a public library and park between Brigham and Lester Avenues. A U.S. Post Office is located at 307 Main Street in Johnson City.

4. Parks and Open Space

Figure III-3 E-J BOA Land Ownership, Historic Sites, and Public Parks shows the locations of existing parkland and open space within the Study Area, as well as in surrounding locations.

CFJ Park is a 5.6 acre park located in the northernmost portion of the Study Area. Three other small parks are located in the Johnson City portion of the BOA. The parcel adjacent to the public library at 115 Main Street is classified as a park in the Broome County assessment database, as is the 283 Main Street property. A small park is located at 55 Willow Street, across from the Goodwill Theatre.

The future Walmart Supercenter site, a 13.4 acre vacant property located just north of the railroad tracks at Lester Avenue, is currently the largest piece of open space in the BOA, but will be developed in the near future.

CFJ Park is a Village of Johnson City public park located in the northernmost portion of the BOA, and features a functioning Herschell Carousel as its primary attraction. Other recreational facilities at CFJ Park include tennis courts, playground equipment, and Little League fields.

South of the BOA and outside of the Study Area boundary, Floral Park Cemetery is a 48-acre cemetery on Floral Avenue. Adjacent to the cemetery and also south of the Study Area, Floral Avenue Park covers approximately 5 acres of land. The park features a swimming pool, playground, and other recreational facilities.

5. Historic Assets

The Study Area is located in the Susquehanna Heritage Area. New York's Heritage Area system was established to "preserve and develop areas that have special significance to New York State". The Susquehanna Heritage Area celebrates the rich industrial past of Binghamton, Endicott and Johnson City, and the area's role in providing opportunities to immigrants.

There are five State and National Register historic sites located in or near the BOA, which are noted in *Figure III-3 E-J BOA Land Ownership, Historic Sites, and Public Parks*. They include:

- **CFJ Park Carousel:** Located in the northern portion of the Study Area at CFJ Park, the carousel was dedicated in 1923 by George F. Johnson under the stipulation that no money shall ever be charged for rides. The CFJ carousel is one of the most elaborate of its kind, with a pagoda-style carousel house and 72 hand-carved figures standing 4 abreast. The carousel operates between Memorial Day and Labor Day.
- **Goodwill Theatre:** The theatre was built in 1920 using funds provided by George F. Johnson for the enjoyment of Endicott-Johnson employees and village residents. In its early years, the Goodwill Theatre was used for employee minstrel shows, boxing matches, traveling shows, and concerts. It was leased in 1928, and operated as a movie theatre until closing in 1960. An effort to restore the Goodwill Theatre is currently underway. Neighboring properties, such as the Firehouse Stage, are included in the ongoing revitalization effort, and the project aims to develop a complex offering several performing arts and cultural venues.
- **Johnson City Post Office:** Located at 307 Main Street in Johnson City, the U.S. Post Office is a nationally registered postal service site.
- **Johnson City Square Deal Arch:** This archway spans above Main Street at the entrance to the Village of Johnson City from the City of Binghamton, and was built as a tribute to George F. Johnson by employees of the Endicott-Johnson Shoe Company. The archway celebrates the company's commitment to the welfare of its employees and reads "Gateway to the Square Deal Town".
- **Your Home Public Library,** located at 107 near the intersection of Main Street and Lester Avenue, was created through the efforts of Harry L Johnson. The library building was originally constructed in 1850 and was converted to a public library in 1917. Your Home Library serves the public to this day.

The Study Area includes a number of defunct manufacturing facilities remaining from the area's bygone industrial era. Although none of the remaining industrial sites are listed as state or federal historic sites, Endicott-Johnson holds a venerated place in American industrial history because of its commitment to ideals as well as its accomplishments as an industrial giant.

George F. Johnson founded the Endicott-Johnson Shoe Company in the 1890s, as a leader he exhibited an unparalleled dedication to his employees and their families. The E-J Shoe Company was the largest shoe manufacturer in the United States for decades, and almost singlehandedly equipped U.S. Armed Forces with footwear during World War I and World War II. Johnson was so well-liked by his employees that they repeatedly rebuffed outside attempts to unionize in an era of potent union influence.

At its pinnacle, Endicott-Johnson employed 24,000 workers and produced 175,000 pairs of shoes daily. George F. Johnson headed the company until his death in 1948, and various members of the Johnson family remained onboard until 1957, when outside management was brought in. The company's slow decline continued through the 1960s forward, and its former plants now stand vacant.

6. Transportation Systems

Roadways

As illustrated in *Figure III-4 Regional Transportation Map*, Broome County is readily accessible by highway, given its location at the convergence of some of the major highways in the northeastern U.S. The east-west Interstate 88, the north-south Interstate 81, and NYS Route 17 – also known as the Southern Tier Expressway – all travel through the Binghamton area. Plans are currently in place to upgrade NYS Route 17, which will serve as Interstate 86 in the future. Generally speaking, traffic congestion is minimal throughout the region.

Figure III-5 E-J BOA Study Area Roadways illustrates the local road network within the Study Area. The network is characterized by a typical urban street system consisting of local roads that connect with major collectors and arterials. Roadways in the area are typically one lane in each direction with on-street parking. The larger roadways have traffic signals, with exclusive turn lanes at major intersections.

Main Street (NYS Route 17C) is the major roadway traversing the Study Area, and provides access to locations throughout the BOA via intersecting streets. Oriented in a northwest/southeast direction, Main Street is classified as an urban minor arterial and essentially parallels the railroad tracks. According to New York State Department of Transportation (NYSDOT) traffic counts, Main Street carries approximately 13,000 vehicles per day. Glenwood Avenue, Lake Avenue, Market Street, CFJ Boulevard and Lester Avenue are classified as urban collectors. Since these roadways are federally classified, they are eligible for federal funding for any type of improvements. All other roadways within the BOA are local roadways.

There is no direct access to the Interstate highway system within the BOA boundaries. However, two NYS Route 17 (future Interstate 86) interchanges are readily accessible from Study Area locations. The Route 17 interchange at Exit 71 is located immediately to the north of the BOA, and can be accessed via Lester Avenue and CFJ Boulevard; the Exit 70 interchange is located approximately one mile west of the Study Area, and can be accessed via Main Street and NYS Route 201.

Transit/Bicycle/Pedestrian

Public transit in the area is provided by Broome County Transit. The primary transit route through the BOA runs along Main Street; bus lines also run along Baldwin Street, Grand Avenue, and Floral Avenue. Buses run along the Main Street route approximately every 15

minutes during peak times and at intervals between 30 to 60 minutes during off-peak times. Other routes run at intervals of approximately 30 minutes during peak times and 60 minutes or more during off-peak times.

According to Broome County mapping, one local bicycle route is located within the Study Area. Local Bicycle Route 1 is a 29-mile bikeway traversing the width of Broome County; within the Study Area, Bicycle Route 1 follows the Main Street corridor.

As is typical in an urban street network, pedestrians are accommodated through a network of sidewalks. There are no dedicated pedestrian pathways or walkways in the Study Area.

Rail/Air

The Greater Binghamton Airport provides air service to the area, and is located approximately seven miles north of the Study Area. Service to and from the area is limited: Direct flights are available eastward to Philadelphia and Washington, D.C. and westward to Detroit. Nearby airports offering relatively limited service include airports in Wilkes-Barre/Scranton, Elmira-Corning, and Ithaca. Longer commutes to Syracuse, Rochester, or Albany provide access to medium-scale airports offering more numerous direct flights. In 2006, there were approximately 107,000 passenger enplanements at the Greater Binghamton Airport.

Freight rail service through the area is provided by Norfolk Southern, a Class 1 railroad which controls the two major rail lines that traverse the BOA; approximately 20 trains travel through the Study Area daily. The Norfolk Southern rail lines essentially bisect the BOA, and in the northern portion of the Study Area, opportunities to travel from one side to the other are limited. Grade separated crossings are provided at Glenwood Avenue, Emma Street, Main Street, Lester Avenue and Arch Street.

7. Utilities and Infrastructure

Generally speaking, all existing utilities and infrastructure in the Study Area are sufficient to support redevelopment of the area without constraint. Municipal mapping data showing utility locations and capacities are unavailable for the Study Area, and could not be provided in this report. The information provided below was obtained from existing documents and interviews with municipal engineers.

Electricity

Electrical service is provided to the BOA by New York State Electric and Gas (NYSEG). According to the *BC Plan*, in 2001 Broome County had a transmission and distribution capacity of approximately 400 megawatts, and served 120,000 customers with a peak demand of 300 megawatts. Electricity costs in Broome County have traditionally been higher than the national average, but NYSEG is known to negotiate pricing for new large users. Additionally, the New York Power Authority can provide low-cost electricity to businesses across the state for projects that demonstrate significant economic development potential for expansion,

retention, or revitalization purposes. Overall, electric service is good in the region and can be expanded to meet the needs of new employers.

Natural Gas

NYSEG provides natural gas service throughout Broome County, including the Study Area. Pricing is moderate, and according to NYSEG, the specific requirements of potential customers would need to be evaluated in order to identify service capacities and necessary improvements.

Parking Infrastructure

Broome County parcel data identify 34 BOA properties that are used primarily as parking lots, most of which are quite small – the average lot area is 0.2 acres.

Of all establishments in the Study Area, Wilson Hospital requires the most parking. Several parking lots, including a 1.9 acre, multi-tier parking garage, are located on properties surrounding the hospital.

Most Study Area roadways allow on-street parking, with metered parking along portions of Main Street and other busy roadways. Most residential properties include driveways for off-street parking; many stores, offices, and other commercial properties have parking available onsite. Generally speaking, under existing conditions, parking presents few issues in the residential and commercial portions of the Study Area.

Water

The City of Binghamton Engineering Department was contacted during the course of the study for information regarding the location, extent, condition and capacity of the water distribution system.

According to the City Engineer, there are no known water system capacity constraints or bottlenecks within the Study Area that would preclude the ability to adequately supply water to the Study Area. Many older cast iron mains have been replaced with ductile iron pipes. Minimum water pressure is believed to be within the 65 to 70 psi range. No booster stations serving the Study Area limit the capacity or pressure of water service provided. The City of Binghamton Water Treatment Plant has adequate excess capacity of treated Susquehanna River drinking water, and would be able to support additional demand for water.

Information on the Village of Johnson City water distribution system was obtained from the Director of Physical Services during the course of the study. The Village has undertaken a program to systematically replace many of the older water mains located within the Study Area with new ductile iron pipes. There are no known bottlenecks or capacity constraints within the water distribution system that would limit the supply of potable water to the Study Area.

Wastewater

The City of Binghamton Engineering Department was also contacted during the course of the study for information on location, extent, condition, and capacity of the sanitary sewer system. The Study Area is served by both separate sanitary sewers and combined sewers; According to information obtained from the City Engineer, there are no known capacity constraints or bottlenecks in the sanitary sewer system. All sanitary sewage from the Study Area is conveyed to the Lake Avenue Pump Station which was upgraded after 1993 and does not have any capacity concerns. The sanitary sewage is conveyed to the Binghamton – Johnson City Joint Sewage Treatment Plant which is currently being upgraded and is believed to be able to treat approximately 26 MGD (million gallons per day) during dry-weather conditions and upwards of 70 MGD during wet-weather conditions.

Information on the Village of Johnson City sanitary sewer system was also obtained from the Director of Physical Services during the course of the study. There are no known sewers that have flow capacity constraints or bottlenecks in the Study Area. All sewage generated within the Village of Johnson City is pumped at the Terminal Pump Station (which was recently upgraded with new sewage pumps) to the Binghamton – Johnson City Joint Sewage Treatment Plant for treatment prior to discharge to the Susquehanna River.

Stormwater

At the present time, the storm sewer system within the Study Area is quite limited, since most of the area is served by combined sewers. The only areas that experience flooding are the roadway underpasses during severe storm events. According to the City of Binghamton Engineer, the City is currently in the process of expanding the storm sewer system in the area and removing this storm water from the combined sewer system which is tributary to the Binghamton – Johnson City Joint Sewage Treatment Plant. Removal of the stormwater from the combined sewer system provides capacity for additional sanitary sewer flows.

8. Natural Resources

Figure III-6 Natural Resource Features illustrates the natural resource features located in and near the Study Area.

The Study Area is located in an urban setting, and there are few natural resource features that have not been disrupted by development.

The Chenango River is located to the east of the Study Area, flowing southward into the City of Binghamton, where it meets the Susquehanna River approximately one mile southeast of the BOA. Study area elevations range between 255-270 meters above sea level. Gentle slopes of less than 5 degrees follow a downward gradient in the direction of the Susquehanna.

An unconfined aquifer covers much of the land to either side of the Chenango and Susquehanna Rivers; the entire Study Area is located within this aquifer. There are currently no uses for ground water in the Study Area, and none are anticipated for the future.

No wetlands are located within the Study Area bounds. In addition, the BOA does not overlap the FEMA-designated floodplains associated with the Chenango or Susquehanna Rivers. However, some floodplain area overlaps a small area in the northern portion of the Study Area.

The Fish and Wildlife Service's Threatened and Endangered Species database contains only one species for Broome County, the bald eagle, which was delisted in August 2007. Natural habitat in the Study Area holds little if any potential to support the bald eagle.

Soil types throughout the Study Area are classified as "Urban Land – Howard – Niagara".

9. Brownfield and Underutilized Sites

A description and analysis of the size and condition of each brownfield, abandoned, or vacant site located within the Study Area was prepared based on a review of existing and historical records, site visits, existing remedial investigations and interviews with stakeholders who were familiar with a specific site. *Figure III-7 Underutilized Sites and Building Location Map* shows the location of each site in the Study Area. Descriptive information specific to each site, including ownership information, was catalogued on individual Site Profile Sheets (Appendix A), which include the following information:

- Tax parcel number
- Owner name and address
- Zoning designation
- Natural and/or cultural significance
- Current and historical use of property
- Structural information
- Utility service
- Adjacent land uses
- Known or suspected contamination onsite
- Evidence of potential contamination and/or waste storage
- Other site issues

Study Area properties were identified as brownfields because they meet one or more of the following criteria:

- Known or suspected contamination is present onsite, due to current or former uses. Determinations were based upon a review of each property's environmental history documented by existing environmental reports, reported spills and the Broome County database of brownfield sites.
- Abandoned, vacant or underutilized status was determined through Steering Committee input and field observations. Signs of deterioration such as boarded or broken windows, overgrown vegetation and/or other signs of neglect were used to identify appropriate properties.

10. Selection of Strategic Sites for Future Redevelopment

The list of brownfield, abandoned and vacant sites was further refined in the next stage of the planning process. Sites were selected based on input from the Steering Committee and public, as well as observations made during visits to the EJ BOA. Blighted or underutilized conditions and detrimental impacts to the surrounding area were important criteria used in the selection of Strategic Sites. Additionally, preliminary assessments of the potential to make positive contributions to the area were important in the selection of Strategic Sites.

The majority of the selected sites are located in a concentrated area. These sites became a focus of the study's recommendations, specifically because of their existing conditions and current impact on their surroundings. Additional reasons for selection of these sites include:

1. These sites are in close proximity to the Wilson Memorial Regional Medical Center, a major campus of United Health Services, one of the region's largest employers. Based on the economic and market trends analysis (discussed below), it was determined that properties surrounding Wilson Hospital could potentially be occupied by healthcare-related uses, or provide other services to hospital employees or patrons.
2. These sites are located near to the Goodwill Theatre Complex, which is currently being renovated and is expected to become a major attraction as one of the Broome County's arts and cultural centers.
3. This area has very good access to the area's major routes, including Interstates 81 and 88, and Route 17 (future Interstate 86).
4. Development projects involving two of the selected Strategic Sites are currently either underway or in the planning stages. It is important to capitalize on the area's momentum in ways that will complement, rather than compete against, these proposed projects. The purchase of 135-159 Baldwin Avenue by a private entity is currently under negotiation, and initial plans call for the development of a multifamily apartment complex, which may be used primarily for student housing. 18 Park Street/25 Ozalid Road has been acquired by a small manufacturer intending to expand its business on this property, which may provide opportunities to develop complementary uses as part of a cohesive industrial/commercial area.

A description of each of the Strategic Sites is provided as follows (See *Figure III-7*, for the location of each).

76 Arch Street (A1)

This 5,300 sf, wooden-framed apartment building is located on a 0.11 acre parcel at the corner of Arch Street and Corliss Avenue, approximately one block from Wilson Hospital. The building occupies a prime



location in the Wilson Hospital District, and is zoned General Commercial (CG).

76 Arch Street is in a visibly deteriorated condition, although no signs of deflection or structural settling were observed from the building's exterior during site visits. The property owner has not paid taxes on the property for 12 years, and appears to be vacant. Broome County has not foreclosed on the property because the owner is in bankruptcy. The structure was built in 1960, and based on its age, lead paint and asbestos are suspected to be present. As a residential structure, there is no reason to suspect that other contamination may be present.

Demolition of the structure is recommended, and future use of the property should consider the site's potential contributions to the Wilson Hospital District. Potential future uses of the 76 Arch Street property may include residential or hospital-related uses.

80 Arch Street (A2)

This 3-story, 34,000 sf stone building is located on a 1.2 acre parcel at the corner of Arch Street and Corliss Avenue, approximately one block from Wilson Hospital. This building has unique architectural character, and appears to be in good condition with reuse potential for healthcare-related services given its prime location in the Wilson Hospital District. An ancillary building and small parking area is also located on this parcel. The property is zoned Industrial (I). Tax records indicate that the property owner is current with municipal taxes owed, which indicates a vested interest in the redevelopment potential of the property.



There are signs of cracking in the exterior walls, and there are no apparent lintel deflections. The stone façade appears to be sound and intact and no settlement is evident. The building directly abuts the sidewalk, and may inhibit pedestrian circulation around it, and in particular, to access the building's front door. The building is currently vacant.

Historic research indicates that the property was used for industrial purposes in the past, and there is potential for soil/groundwater contamination to exist. Based on the age of the building, it is suspected that lead based paint and asbestos containing materials are present.

Nearby hospital parking may be available to accommodate future occupation of the 80 Arch Street property. All utilities are available to the site, and no improvements would be necessary to support its reuse. The surrounding street system and streetscape should be upgraded to attract new users to the property. 80 Arch Street appears to be poised to contribute to the future development of the Wilson Hospital District. Potential future uses of the property may include residential or hospital-related uses.

96 Corliss Avenue (A3)

The 96 Corliss Avenue property is currently owned by Eagle Properties Corp., and no back taxes are owed. Four existing structures are located on the property:



- The five-story, 140,000 sf. brick E-J industrial building in the southern portion of the property is partially utilized for storage and shows a general lack of exterior maintenance.
- Indian Valley Industries occupies two butler-style buildings (1-story, approximately 21,000 sf each for a total of 42,000 sf floor space) in the northern portion of the property. The company supplies and manufactures environmental products and is considered a stable, viable use.
- Empire Recycling occupies a 21,000 sf metal building located in the center of the property. This building is used as a transfer station for recyclable materials..

The property's three metal buildings lack character but are structurally sound and functional. Despite its derelict appearance, no structural deficiencies were observed from the exterior during site visits.

96 Corliss Avenue previously housed an E-J manufacturing operation, and there is potential for soil/groundwater contamination to exist. Based on the age of the building, it is suspected that lead based paint and asbestos containing materials are present. Additional contamination may be present onsite, and further investigation would be required to determine the nature and extent of contamination and to identify appropriate remediation measures.

The former E-J industrial building is partially utilized for storage but no longer supports viable industry. While Indian Valley Industries and Empire Recycling represent viable uses located on the property, these uses do not correspond with key opportunities identified by the market analysis, and contribute little to the character of the area. Uses such as research and development, healthcare-related services, and/or office uses are considered the "best uses" in terms of implementing a cohesive redevelopment plan for the area, and should be considered among the potential future uses of the site. Nonetheless, Indian Valley Industries and Empire Recycling are viable operations located on the property; these uses align with the property's Industrial zoning designation, and no overdue taxes are owed on the property.

42 Willow Street (A4)

42 Willow Street is a small commercial-style brick building owned by the Goodwill Theatre organization, and is located between the recently renovated Firehouse Stage and the historic but, vacant Goodwill Theatre. This building is the former Johnson City Public Works garage and Police Station.



The Goodwill Theatre is scheduled for major renovations, and is expected to be reestablished as one of the region’s premier performing arts destinations. 42 Willow Street is currently used for storage, and will be demolished to allow improved access to the Goodwill Theatre Complex venues and parking. The building shows no signs of structural deficiencies.

Historic research reveals no evidence of contamination, although lead-based paint, asbestos containing materials, and/or other contamination from past industrial uses in the area may be present.

The Goodwill Theatre Complex is poised to become a prominent attraction that will help stimulate improvements to the Study Area. Future uses of 42 Willow Street should benefit the creation of a successful center for the arts. Potential uses include parking or circulation space benefitting the Theatre, art studio or gallery, or a dining establishment associated with the Goodwill Complex.

135-139 Baldwin Street (A6)

135-139 Baldwin Street is a vacant 5-story, 56,000 sf industrial building formerly used by the E-J Company. The property is zoned Industrial, and is located to the south of 96 Corliss Avenue. A private developer has recently purchased the property, and has expressed interest in reusing the structure for housing. The developer identifies students and hospital-affiliated professionals as potential housing occupants.



The building is neglected and in need of exterior improvements. The building’s exterior shows signs of possible structural deficiencies, and further evaluation is recommended.

Through its EPA-funded Brownfield Assessment Program, Broome County sponsored a Phase I Environmental Assessment of 135-139 Baldwin Street. Soil testing was completed at this initial phase of environmental review, and indicated the presence of some compounds at concentrations above State standards. In addition, an oil house located onsite could be a potential source of soil and/or groundwater contamination. As with most buildings of this age

and type, it is assumed that lead paint and asbestos-containing materials may be present in the structures. Further analysis will need to be completed to verify all of these potential concerns.

The Phase I Assessment recommends that innocuous wastes should be removed from the site. All hazardous materials should be removed for proper disposal prior to any future demolition or construction activities. Pigeon guano should be removed from the building's interior to eliminate potential risks to workers, and if soil and/or groundwater contamination is confirmed, there is a potential for exposure by vapor intrusion.

Residential uses are currently being considered for the 135-139 Baldwin Street property. The potential introduction of a large-scale apartment use at 135-139 Baldwin Street would draw a round-the-clock population of students and professionals to the Study Area. If successful, this residential development may stimulate demand for additional housing in the surrounding area. Commercial establishments along Main Street, in the Wilson Hospital District, and along Floral Avenue to the south may benefit from increased demand for their services.

147 Grand Avenue (A7)

147 Grand Avenue is a 4-story, 60,000 sf former industrial building located at the southern boundary of the Study Area, south of the 135-139 Baldwin Street property proposed for reuse as an apartment building and north of the residential neighborhood surrounding Floral Avenue. The building is currently used for storage, and the property is zoned Industrial.



No apparent structural deficiencies were observed from the building's exterior during site visits.

The property was used for industrial purposes in the past, and there is potential for soil/groundwater contamination to exist. Based on the age of the building, it is suspected that lead based paint and asbestos containing materials are present. Additional contamination may be present onsite, and further investigation would be required to determine the nature and extent of contamination and to identify appropriate remediation measures.

Assuming that future residential uses will be introduced at 135-139 Baldwin Street, the 147 Grand Avenue will be physically isolated from the majority of the Study Area and surrounded by residential and institutional uses including an adjacent mosque. Depending on future demand for residential space at the site, there may be viable opportunities for reuse as an apartment building similar to the adjacent Baldwin Street Strategic Site. To encourage the concentration of commercial and light industrial uses in central portions of the Study Area, 147 Grand Avenue should not be considered a priority site for commercial redevelopment in the near term, although this recommendation may be revisited if Study Area improvements generate sufficient demand for commercial and/or light industrial space.

48 Corliss Avenue (A8)

48 Corliss Avenue is a 5-story, 99,000 sf building zoned for Industrial use, and is currently occupied by TK Storage. The building is underutilized, particularly given its proximity to Wilson Hospital and the Goodwill Theatre Complex. Eight years of outstanding taxes are owed on the property; however, Broome County has not foreclosed on the property because it has established a policy to not take ownership and therefore liability of properties without a specific plan and potential buyer for the site.



Despite the building's derelict appearance, no structural deficiencies were observed from the exterior during site visits.

Historical research indicates that 48 Corliss Avenue was used for industrial purposes in the past, and there is potential for soil/groundwater contamination to exist. Based on the age of the building, it is suspected that lead based paint and asbestos containing materials are present. Additional contamination may be present onsite, and further investigation would be required to determine the nature and extent of contamination and to identify appropriate remediation measures.

The corner-lot location of 48 Corliss Avenue provides high visibility at an intersection expected to become a hub of activity as the area develops. Redevelopment of this property is recommended to occur in coordination with redevelopment efforts involving other nearby Strategic Sites. The site's proximity to the Goodwill Theatre and Wilson Hospital would be favorable to medical-related businesses or office/light industrial operations that could benefit from nearby cultural and entertainment offerings. An urban-style office park integrating 48 Corliss and neighboring properties would bring industry and investment to this prime location, and is recommended as a potential future use for this site.

42/44 Corliss Avenue (A9)

42 and 44 Corliss Avenue are adjoining properties with a total 99,000 sf of floor space, and the property is 1.05 acres in size. The property is zoned Industrial. Both buildings are currently vacant, and outstanding taxes are owed for one year. To the south, the adjoined structure at 46 Corliss Avenue is scheduled for demolition. Given the underutilized nature of the property and non-payment of taxes, the property is likely to be available for redevelopment.



Based on exterior observations made during site visits,

the 42/44 Corliss Avenue structures show signs of minor structural deficiencies. Further investigation of their structural integrity is recommended, including an assessment of how demolition of the adjoined 46 Corliss Avenue will affect these structures. If existing structures are to be reused, rehabilitation of the exterior facades should be considered to make them more appealing.

42/44 Corliss Avenue was used for industrial purposes in the past, and there is potential for soil/groundwater contamination to exist. Based on the age of the buildings, it is suspected that lead based paint and asbestos containing materials are present.

This property is located in the heart of an area that appears primed for redevelopment, and future uses may include research and development, office and/or light industrial space. Redevelopment of 42/44 Corliss Avenue property should be coordinated with efforts involving other nearby Strategic Sites, including 46 Corliss Avenue. The demolition of 46 Corliss Avenue will substantially enhance the redevelopment potential of 42/44 Corliss Avenue by eliminating the derelict structure to create space for parking, circulation or office/light industrial development compatible with an urban office park concept.

46 Corliss Avenue (A10)

The 46 Corliss Avenue property is currently vacant, and five years of outstanding taxes are owed. Restore NY funding has been secured to finance demolition of the building, which is located on the site of a former ANSCO manufacturing facility. Its demolition will be coordinated by the Town of Union according to plans submitted through the Restore NY program. Demolition of this contaminated structure will enhance the development appeal of 46 Corliss Avenue and surrounding properties by eliminating the derelict structure to create space for parking, circulation or office/light industrial development compatible with an urban office park concept. Development on this property is recommended to be coordinated with the redevelopment of nearby Strategic Sites, including 42/44 Corliss Avenue.



18 Park Street/25 Ozalid Road (A11)

The 3-story, 57,000 sf 18 Park Street/25 Ozalid Road building is located on a 1.85 acre parcel, and is zoned Industrial. A local manufacturer has recently purchased the property, and plans to rehabilitate the building for light industrial and office uses.



Based on observations of the building's exterior made during site visits, the structure appears to be sound, and should accommodate its intended future uses.

As with surrounding properties, 18 Park Street/25 Ozalid Road is suspected to contain lead-based paint and asbestos-containing materials. Due to past industrial use, there is potential for soil/groundwater contamination to exist.

Future light industrial usage of the 18 Park Street/25 Ozalid Road may provide momentum to enhance the development appeal of neighboring Strategic Sites. Dialogue with the property owner should be sustained on an ongoing basis regarding the status of this property's redevelopment. Plans for the surrounding area should incorporate 18 Park Street/25 Ozalid Road in order to provide a cohesive and functional built environment.

59 Lester Avenue (B2)

59 Lester Avenue includes a 5-story, approximately 260,000 sf concrete building formerly used for E-J manufacturing operations. Parking spaces and an auxiliary structure on the southern side of Helen Drive are considered part of the 59 Lester property, which covers 4.13 acres in total. Eight years of back taxes are owed on the property. The owner generates income by leasing a portion of the property for storage purposes. It is recommended that the county should encourage redevelopment of the property to support a more productive use.



59 Lester Avenue was used for industrial purposes in the past, and there is potential for soil/groundwater contamination to exist. No apparent structural deficiencies were observed from the building's exterior during site visits. Based on the age of the building, it is suspected that lead based paint and asbestos containing materials are present. Additional contamination may be present onsite, and further investigation would be required to determine the nature and extent of contamination and to identify appropriate remediation measures.

This property is accessible by rail and offers visibility from NYS Route 17 (future I-86). Upon construction of the future Walmart Supercenter in the northern portion of the Study Area, 59 Lester Avenue will benefit from greater exposure to consumer traffic. For these reasons, 59 Lester Avenue is poised to draw the interest of developers. Redevelopment of this site could potentially draw activity to the area north of Main Street, and could stimulate further investment in nearby properties. Potential future uses for the site include commercial and/or light industrial uses such as building trade contractors, cabinet makers, equipment repair and maintenance services, food and beverage suppliers, food preparation and service, computer and technical repair.

C. Economic and Market Trends Analysis

This market analysis considers a body of information obtained from existing documents and data sources, interviews with local stakeholders (i.e. neighborhood businesses, property owners, developers, financial institutions, real estate brokers, local government officials, state agencies), and site/market reconnaissance. Demographic data used in this analysis were obtained from ESRI Business Solutions. The specific aims of this analysis are to ascertain market trends, patterns, market perceptions, as well as to consider site location, household and labor characteristics, and industry structure.

1. Demographic Analysis

General Demographics

Table III-3 *Regional Demographic Characteristics (2007)* provides a demographic overview of the E-J BOA Study Area, the Village of Johnson City, the City of Binghamton, Broome County and the Greater Binghamton Metropolitan Statistical Area (MSA).

Table III-3 General Demographic Characteristics (2007)					
	BOA Area	Johnson City	Binghamton	Broome County	Greater Binghamton
Population	1,047	15,066	46,445	197,472	249,305
Households	557	6,889	20,962	80,784	100,920
Med. Household Inc.	\$19,020	\$34,811	\$31,744	\$44,547	\$45,559
Med. Home Value	\$119,375	\$124,249	\$128,836	\$143,716	\$143,906
Median Age	32.8	40.4	37.3	40.2	40.3

Source: ESRI Business Solutions, BBPC Associates.

Median household incomes and home values are highest for Broome County and the Greater Binghamton area, indicating that the region’s wealth is dispersed among suburban areas. The median household for Study Area residents is disproportionately low compared to the other areas, while median home value for the Study Area is similar to the median home values of Johnson City and Binghamton. These data demonstrate a prevalence of lower-income households and lower-value, smaller, homes within the Study Area relative to other parts of the region.

Age Cohorts

A trend of declining population is projected for the region between 2007 and 2012 (*Table III-4 Projected Population Growth, Age Cohorts (2007-201)*). The most substantial declines are for the Below 20, age 35-44, and age 75-64 cohorts. Greater Binghamton as a whole is projected to experience a substantial increase in the 25-34 age cohort population, despite declines in this cohort for the other analysis areas. Annual population increases occurred across all four areas in ages 55-74. These trends indicate that generally speaking, the region’s population is aging.

Table III-4 Projected Population Growth, Age Cohorts (2007-2012)				
Age Cohort	Study Area	Johnson City	Binghamton	Greater Binghamton
<i>Below 20</i>	-1	-30	-115	-875
<i>20 - 24</i>	0	17	31	-42
<i>25 - 34</i>	-7	-29	-48	535
<i>35-44</i>	1	-37	-118	-1,154
<i>45-54</i>	-4	-11	-66	16
<i>55 - 64</i>	6	50	158	826
<i>65 - 74</i>	0	2	54	157
<i>75-64</i>	-1	-19	-64	-130
<i>85+</i>	0	-1	22	134
Overall	-6	-56	-144	-534

Source: ESRI Business Solutions, BBPC Associates.

Income Cohorts

Table III-5 Average Annual Household Growth by Income Cohort (2007-2012) shows the projected change in number of households by income cohort from 2007 to 2012. Higher income cohorts (\$75,000 and higher) are projected to grow, with the most substantial growth for Johnson City, Binghamton and Greater Binghamton occurring in households making between \$100,000 and \$149,999 annually. There was also growth in households with incomes between \$35,000-\$49,999 in the Study Area, Johnson City and Binghamton. The greatest declines for all areas were in households making less than \$35,000.

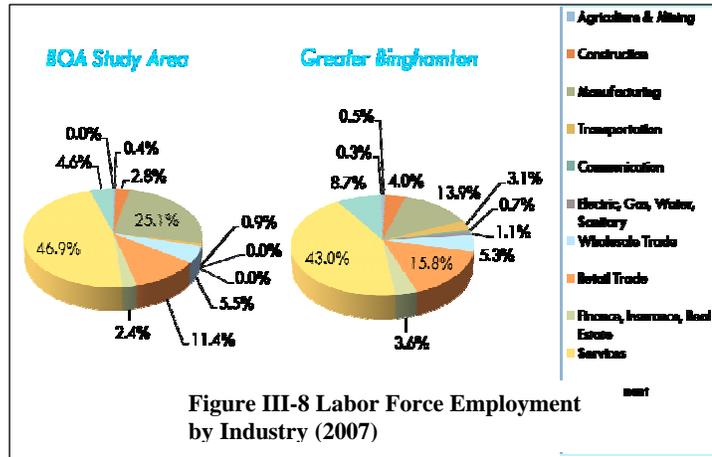
Table III-5 Average Annual Household Growth by Income Cohort (2007-2012)				
Age Cohort	Study Area	Johnson City	Binghamton	Greater Binghamton
<i>< \$15,000</i>	-7	-42	-137	-429
<i>\$15,000 - \$24,999</i>	-3	-23	-56	-328
<i>\$25,000 - \$34,999</i>	3	-58	-79	-630
<i>\$35,000 - \$49,999</i>	2	29	3	-88
<i>\$50,000 - \$74,999</i>	-1	-24	3	-130
<i>\$75,000 - \$99,999</i>	1	33	64	156
<i>\$100,000 - \$149,999</i>	2	43	119	862
<i>\$150,000 - \$199,000</i>	0	13	20	220
<i>\$200,000 +</i>	0	15	37	301
Overall	-2	-14	-34	-45

The Study Area and Johnson City are projected to experience higher growth in low- to moderate-income households relative to the City of Binghamton and the Greater Binghamton area. Growth is also projected for the higher income cohorts in these two areas, indicating a

greater projected degree of socioeconomic diversity in the future for the Study Area and Johnson City.

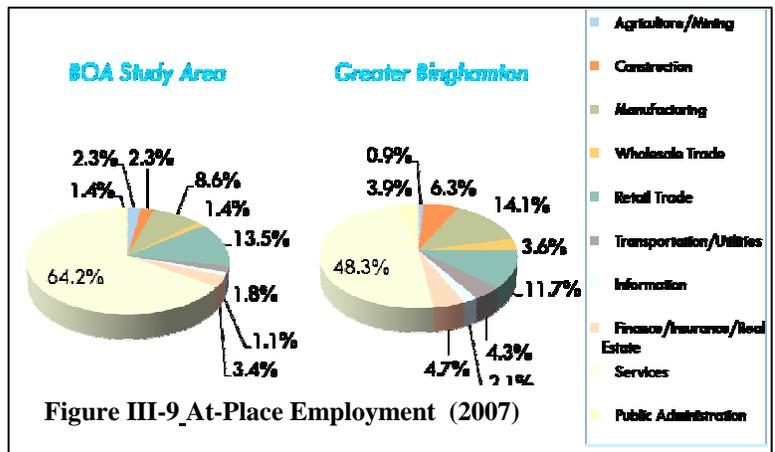
Labor Force Characteristics

Figure III-8 Labor Force Employment by Industry (2007) summarizes the 2007 BOA Study Area and Greater Binghamton labor forces by industry. In 2007, the total Study Area labor force was 443 and the Greater Binghamton area labor force was 166,033. Service Industry employment is widespread among Study Area and Greater Binghamton residents, constituting 64.2% and 48.3% of their labor forces, respectively. Retail trade employment was the second most prominent industry represented in the Study Area labor force (13.5%). Manufacturing employment was third highest for the Study Area labor force (8.6%) and second highest for the Greater Binghamton labor force (14.1%).



At-Place Employment

At-place employment represents all persons employed within a respective area of analysis. In 2007, approximately 111,990 people were employed in the Greater Binghamton area and 1,802 people were employed in the BOA Study Area.



The percentage breakdown of at-place employment by industry was similar for the Study Area and Greater Binghamton (Figure III-9 At-Place Employment by Industry 2007). Services represented the dominant industry for both areas, constituting 64.2% of Study Area employees and 48.3% of Greater Binghamton employees. Manufacturing was the second most prominent employment industry in the Study Area (25.1%) and the third most prominent industry in Greater Binghamton (13.9%). The retail trade industry represented 15.8% of Greater Binghamton employment and 11.4% of employment in the Study Area.

Labor Force vs. At-Place Employment

Table III- 6 BOA Study Area Labor Force/At-Place Employment (2007) compares the top labor force and at-place employment industries for the BOA Study Area.

Table III-6 BOA Study Area Labor Force/At-Place Employment (2007)				
Category	Labor Force	% of Total LF	At-Place Employment	% of Total A-P Employment
Services	285	64.3%	843	46.8%
Retail Trade	60	13.5%	205	11.4%
Manufacturing	38	8.6%	451	25.0%
Finance/Insurance/Real Estate	15	3.4%	43	2.4%
Construction	10	2.3%	50	2.8%
Other	35	7.9%	209	11.6%
Total	443	100.0%	1802	100.0%

Source: ESRI Business Solutions, BBPC Associates.

The representative percentages of these top industries are similar. However, the Study Area’s at-place employment base is more than four times greater than its labor force (1,802 to 443), indicating that most at-place employees commute to and from the Study Area. Opportunities may exist to cultivate a live-work community within the Area.

Top Employers

The 10 largest employers in Greater Binghamton in 2007 include a mix of private and public sector employers *Table III-7 Top 10 Employers in Greater Binghamton MSA*. Lockheed Martin was the largest employer in the region with approximately 4,000 employees, with New York State (3,600 employees), United Health Services (3,100 employees), Binghamton University (2,800 employees) and Broome County Government (2,500 employees) rounding out the top five.

Table III-7 Top 10 Employers in Greater Binghamton MSA				
	Company	Location	# of Employees	Description
1	Lockheed Martin	Oswego	4000	Systems Integration
2	New York State	Binghamton	3600	Government
3	Unite Health Services	Binghamton	3100	Healthcare
4	Binghamton University	Vestal	2800	Education
5	Broome County Government	Binghamton	2500	Government
6	Lourdes Hospital	Binghamton	2000	Healthcare
7	Endicott Interconnect	Endicott	1800	Electronics
8	IBM Corp.	Endicott	1450	Technology
9	Broome Developmental Center	Binghamton	1400	Human Services
10	Amphenol Aerospace	Sidney	1400	Electronic Devices

Wilson Medical Center, the main healthcare center for the United Health Services (UHS) system is located within the BOA Study Area and employs a large part of UHS' 3,100 employees. The Center draws patients and staff from throughout the Greater Binghamton region and beyond.

Employment Growth Trends

Table III-8 *Fastest Growing Occupational Sectors in the Southern Tier Region (2004-2014)* lists the occupational sectors projected to experience with the greatest growth from 2004 to 2014 in the Southern Tier Region (including Broome, Tioga, Chenango, Steuben, Schuyler, Tompkins, Cortland, Otsego and Delaware Counties). These eight occupational groups represent 52% of the region's expected employment growth from 2004 to 2014, despite representing only 32% of current total employment.

Table III-8 Fastest Growing Occupational Sectors in the Southern Tier Region (2004-2014)			
Occupation	2004 # of Employees	2014 Projected # of Employees	Aver. Annual Gross Emp. Growth
Healthcare Practitioners and Technical	16,340	18,240	190
Healthcare Support	10,140	11,960	182
Personal Care and Service	12,140	13,520	132
Building Cleaning	13,150	14,340	119
Computer & Math	5,890	6,820	93
Management	15,420	16,340	92
Social Services	6,690	7,600	91
Food Preparation/Serving	25,250	26,110	83
Subtotal	105,020	114,930	982
Other	240,560	249,520	905
TOTAL (all occupations)	345,580	364,450	1,887

Source: Broome County Industrial Development Authority.

Healthcare practitioners, technicians and support staff account for almost 20% of the expected employment growth from 2004 to 2014. Given the predominance of healthcare-related occupations in the Study Area and the Greater Binghamton region as a whole, this trend shows a competitive strength and potential focus for future economic, business and workforce development. Wilson Medical Center, located in the Study Area, provides numerous jobs falling into the two fastest growing occupations in the Southern Tier Region – healthcare practitioners/technicians and healthcare support.

2. Market Overview

Office Market

Table III-9 Lease & Vacancy Rates and Inventory for Office Space in the Greater Binghamton MSA (2007) shows the ranges of lease rates, average lease rates, vacancy rates and inventory for new construction, Class A and Class B office space in the Downtown Binghamton/Johnson City (including Study Area) and suburban office markets. Suburban office space has higher lease rate ranges and average lease rates than Downtown office space. Lease rate ranges and effective average lease rates are higher for Class A space in both the downtown and suburban markets. New construction in the suburban market (information for 2007 downtown new construction was not available) exhibited higher lease rate ranges and a higher average lease rate than suburban Class A office space.

Table III-9 Lease & Vacancy Rates and Inventory for Office Space in the Greater Binghamton MSA (2007)				
Classification	Lease Rate Range	Effective Average Lease Rates	Vacancy Rate	Inventory
Downtown				
New Construction	N/A	N/A	N/A	N/A
Class A	\$13.00 - \$19.00	\$15.00	10%	700,000 SF
Class B	\$8.00 - \$12.00	\$10.00	30%	1.6 million SF
Suburban				
New Construction	\$20.00 - \$26.00	\$22.00	N/A	N/A
Class A	\$17.00 - \$24.00	\$19.00	10%	600,000 SF
Class B	\$10.00 - \$14.00	\$12.00	30%	2.4 million SF

Source: Pyramid Brokerage Company

Class B office space, which dominates the Study Area, has triple the vacancy rate of Class A space. Renovation of current Class B space along Main Street could boost its appeal by providing more amenities and higher quality office space. Also, the addition of amenities and vibrant retail could further support the appeal of Main Street office space in the Study Area.

The region’s greatest employment growth is projected to occur in the healthcare and healthcare support industries. With the Study Area and Greater Binghamton’s relatively high concentration of healthcare employment, this presents an opportunity to bolster healthcare-/medical- related office employment. Wilson Medical Center may generate expanded office demand either through direct expansion of the Center itself or through spin-off healthcare-related office space in proximity to Wilson.

There has already been some momentum created by the new Sante Comprehensive Women’s Healthcare medical office on Main Street in the northwest section of the Study Area.

Given the Study Area’s high employment-to-resident ratio compared to the Greater Binghamton metro area, it has a relative strength as an employment center. This relatively high concentration of employment could help establish the Study Area as a future magnet for office employment.

Residential Market

Table III-10 General Residential Statistics (2007) summarizes the characteristics of residential properties in the BOA Study Area and Greater Binghamton area. Renter-occupied, multifamily units are much more prevalent in the BOA Study Area than in Greater Binghamton. There is also a significantly higher residential vacancy rate in Study Area residential units. Median home values in Greater Binghamton are about 21% higher than those in the Study Area, while median rents in Greater Binghamton are about 15% higher.

Table III-10 General Residential Statistics (2007)		
	BOA Study Area	Greater Binghamton
Housing Tenure		
Owner-occupied	14.8%	63.8%
Renter-occupied	65.9%	26.9%
Vacant	19.3%	9.3%
Housing Type		
Single-family	15.7%	62.0%
Multi-family	84.3%	29.7%
Mobile home/Other	0.0%	8.3%
Median Home Value	\$119,375	\$143,906
Median Rent	\$341	\$390

Future demand for residential development and/or redevelopment in the Study Area is influenced by the socioeconomic characteristics of projected future populations in the area. The most significant population growth in the Study Area is projected to be in the 55-64 year age group. This age group represents what are often termed “empty nesters” – married adult couples whose children have moved out of the house.¹ Empty nesters are often looking for greater cultural, entertainment and recreational amenities, often in urban areas. This group generally elicits a demand for apartments or condos closer to urban centers that are rich in entertainment and cultural amenities and provide opportunities for diverse activities.

Older age groups (65+) are also expected to experience relatively high population growth in the near future. This could generate greater demand for “aging-in-place” housing arrangements, which provide seniors access to activities and amenities, as well as enhanced supportive services that still allow for relative independence. Similar to empty nesters,

¹ ESRI Community Tapestry Handbook.

individuals seeking aging-in-place living situations often desire settings in or near urban areas. This may be a particularly good option for residential development in the Study Area given recent senior housing development activity in the vicinity and the existence of developers and resources involved in this development niche.

Projected population growth in individuals age 25 to 34 in Johnson City, Binghamton and Greater Binghamton indicates the potential for graduate student and young professional groups to demand housing in the area. A number of Binghamton University students already live in the Study Area and other areas along Main Street. Area improvements and increased amenities could draw more students living around the University (located in Vestal, about one mile south of the Study Area), particularly graduate students or recent graduates seeking the urban amenities of the Main Street corridor.

Light Industrial/Flex Market

Table III-11 Lease & Vacancy Rates and Inventory for Light Industrial/Flex Space in the Greater Binghamton MSA (2007) shows the lease rate ranges, average lease rates, vacancy rates and inventory for the three subtypes of light industrial/flex space in the Greater Binghamton MSA. High-tech/R&D space (primarily flex space) commanded the highest lease rates in 2007 at greater than twice the average lease rate of bulk warehouse (\$3.50) and manufacturing (\$3.75).

Table III-11 Lease & Vacancy Rates and Inventory for Light Industrial/Flex Space in the Greater Binghamton MSA (2007)				
Classification	Lease Rate Range	Effective Average Lease Rates	Vacancy Rate	Inventory
Bulk Warehouse	\$2.00 - \$5.00	\$3.50	6%	8.3 million SF
Manufacturing	\$2.25 - \$4.75	\$3.75	15%	14.8 million SF
High Tech/R&D	\$6.00 - \$11.00	\$8.00	N/A	N/A

The inventory of manufacturing space (14.8 million square feet) was almost double that of the warehouse inventory (8.3 million square feet). Manufacturing had the highest vacancy rate, at 15%, leaving an estimated 2.2 million square feet of vacant industrial/flex space.

The projected growth in the healthcare practitioner/technician and healthcare support sectors could drive demand for spin-off industries the require flex or light industrial space. These types of industries would be medical equipment, laboratory services, biotech facilities, and other medical-/healthcare-related services. Some companies from these industries could be linked to the Wilson Medical Center, and may require space for medical services and research

laboratories. Support functions for the Wilson Medical Center, such as storage, warehousing or mechanical/operation functions, could be potential users.

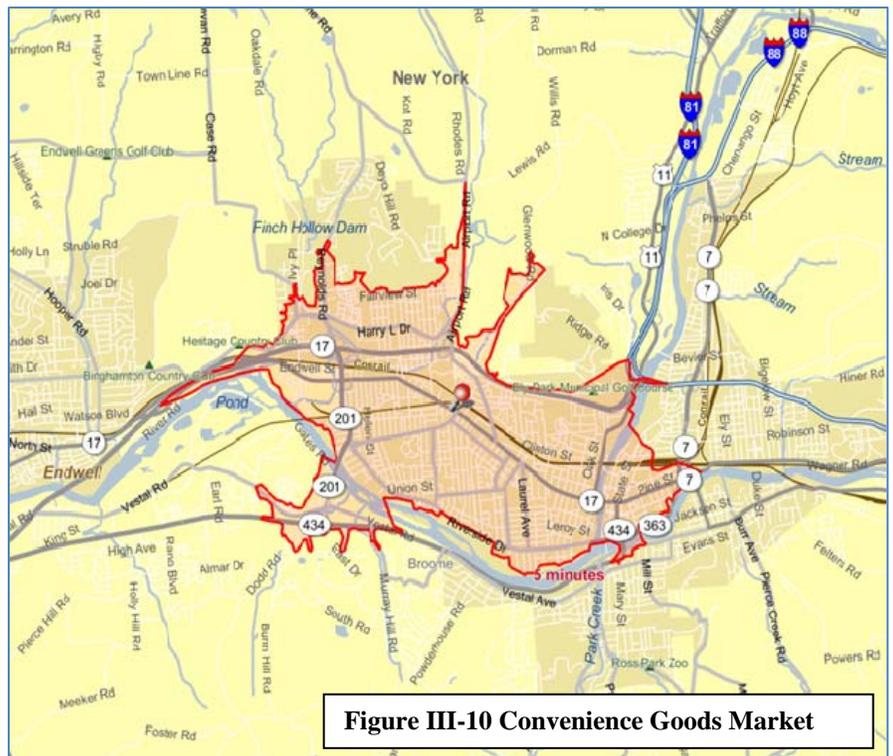
Beyond healthcare-related uses for flex/light industrial space, there could be demand for general industrial users. New or redeveloped flex/light industrial space in the BOA Study Area could appeal to small- to mid-sized industrial users, as compared to older outdated space in industrial parks. Proximity to Main Street and Downtown Binghamton, as well as greater urban amenities, could provide more desirable locations for potential employers and workers. The recent redevelopment of an old Endicott-Johnson industrial site into the current Gannett Press site has provided a precedent that could generate more interest in light industrial redevelopment projects.

Retail Market

Convenience Goods Market Area

The convenience goods market area (CGMA) is the area from which most customers of convenience goods retail sales in the Study Area are estimated to originate (*Figure III-10 Convenience Goods Market Area for the BOA Study Area*). Convenience goods include basic and necessity items that are purchased on a regular basis, such as groceries, dry cleaning, health products and personal care products.

For the BOA Study Area, the CGMA is the area within a five-minute drive of the Area's midpoint. Certain minor adjustments were made to account for major retail centers within the drive shed, primarily the Oakdale Mall, just northwest of the Study Area.



The CGMA has a population significantly larger than the Study Area's, and likewise comprises many more households. See *Table III-12 Comparative Statistics - BOA Study Area and CGMA (2007)*. Residents in the CGMA also have a significantly higher median household income, with Study Area households making just over 60% of what CGMA households make on an average annual basis.

A notable difference between the Study Area and the CGMA is the retail sales/expenditures ratio. This Study Area’s sales/expenditures ration is almost six times higher than that of the CGMA. In addition, while the population, number of households and retail expenditures are all over 30 times higher for the CGMA, retail sales are less than ten times higher than Study Area retail sales. This indicates that the Study Area serves as a retail center for the area.

Table III-12 Comparative Statistics - BOA Study Area and CGMA (2007)			
	Study Area	CG Market Area	Study Area as % of CGMA
Population	1,047	35,850	2.9%
Households	557	17,042	3.3%
Med. Household Income	\$19,020	\$29,804	63.8%
Retail Sales	\$24,672,418	\$202,648,921	12.2%
Retail Expenditures	\$2,115,772	\$99,620,544	2.1%
Inflow	\$22,556,646	\$106,028,377	21.3%
Sales/Expenditures	1,166.1%	203.4%	573.3%

Shoppers Goods Market Area

The shoppers goods market area (SGMA) is the area from which most customers of shoppers goods retail sales in the Study Area are estimated to originate (*Figure III-11 Map of Shoppers Goods Market Area for the BOA Study Area*). Shoppers’ goods include non-essential, luxury and/or goods that are purchased sporadically or infrequently. Examples of shopper goods are apparel, furniture, electronics and books.

The SGMA for the Study Area is larger than the CGMA, generally because many shoppers’ goods demanded by consumers may not be close to where they live or work. The SGMA is defined as the area within a 15-minute drive of the Study Area’s midpoint.

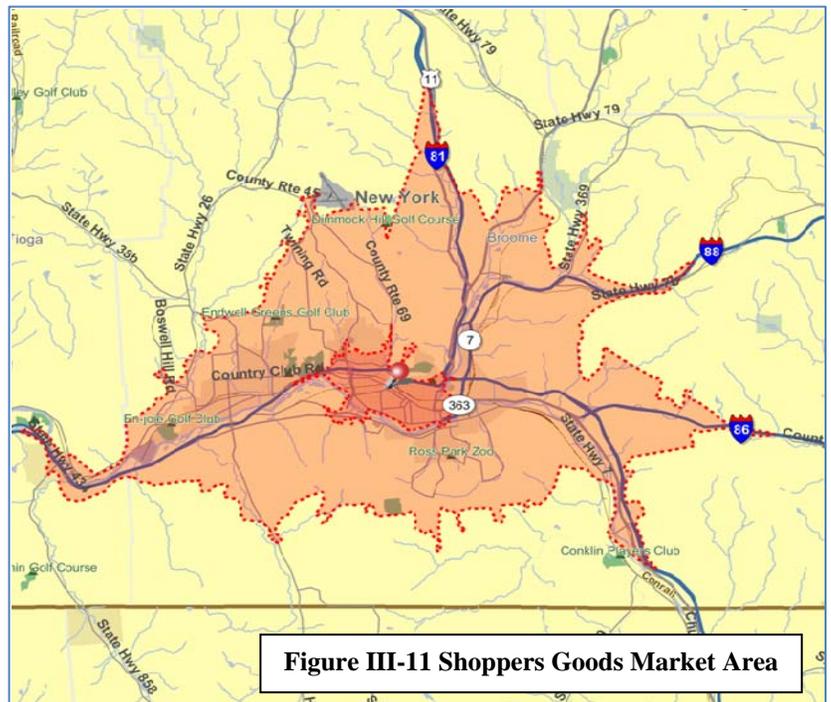


Figure III-11 Shoppers Goods Market Area

The relationship between the BOA Study Area and the SGMA is similar to that between the Study Area and the CGMA (*Table III- 13 Comparative Statistics*). The SGMA is much larger than Study Area in population, number of households, and shoppers’ goods retail expenditures. However, the sales/expenditures ratio is much higher for the Study Area. Median household income in the Study Area is less than half of the SGMA median household income.

Table III-13 Comparative Statistics – BOA Study Area and SGMA (2007)			
	Study Area	SG Market Area	Study Area as % of SGMA
Population	1,047	35,850	2.9%
Households	557	17,042	3.3%
Median Household Income	\$19,020	\$29,804	63.8%
Retail Sales	\$19,181,504	\$1,084,213,369	0.9%
Retail Expenditures	\$2,429,811	\$587,249,342	0.4%
Inflow	\$7,751,693	\$496,964,027	1.6%
Sales/Expenditures	419.0%	184.6%	227.0%

Trends/Characteristics

Convenience goods sales in the BOA Study Area totaled about \$24.7 million in 2007 (*Table III-14 Convenience Goods Sales/Sales/Expenditures (2007)*). Total convenience goods retail expenditures in the CGMA were just less than \$100 million in 2007. The Study Area’s convenience goods sales equaled approximately 25% of expenditures in the CGMA. This percentage provides a rough estimate of the Study Area’s “capture rate” for convenience goods, which is the amount of convenience goods sales to the CGMA that Study Area retail businesses are capturing.

Table III-14 Convenience Goods Sales/Expenditures (2007)			
Category	Retail Sales (Study Area)	Retail Expenditures (CGMA)	Sales Expenditures
Auto Parts & Accessories	\$1,436,359	\$4,250,747	33.8%
Groceries	\$1,213,465	\$29,840,359	4.1%
Specialty Food	\$517,720	\$2,726,745	19.0%
Liquor Sales	\$1,027,085	\$3,444,333	29.8%
Health & Personal Care	\$10,781,986	\$18,772,619	57.4%
Eating & Drinking	\$9,695,803	\$40,585,741	23.9%
TOTAL	\$24,672,418	\$99,620,544	24.8%

There is roughly an additional \$75 million in convenience good sales that businesses in the Study Area could potentially be capturing. The individual retail category capture rates in Table III-14 show that there is particularly strong potential to capture more grocery expenditures, as the Study Area grocery sales account for only about 4% of the CGMA grocery expenditures. In addition, specialty food and eating and drinking establishment sales account for less than 25% of CGMA expenditures in those respective retail categories, indicating the potential for greater capture.

Shoppers goods sales in the BOA Study Area totaled about \$10.2 million in 2007 (*Table III-15 Shoppers Goods Sales/Expenditures 2007*). Total retail expenditures in the SGMA were approximately \$587.2 million in 2007. The Study Area’s shoppers goods sales represented 1.7% of total retail expenditures in the SGMA – this is the Study Area’s estimated shoppers goods capture rate. The low capture rates for shoppers goods can be explained in part by the large size of the SGMA.

Table III-15. Shoppers Goods Sales/Expenditures (2007)			
Category	Retail Sales (Study Area)	Retail Expenditures (SGMA)	Sales Expenditures
Auto Dealers,	\$2,060,150	\$318,527,310	0.6%
Furniture & Home Furnish.	\$1,254,900	\$57,249,656	2.2%
Electronics	\$1,844,330	\$39,065,468	4.7%
Building Materials	\$731,485	\$45,933,568	1.6%
Lawn & Garden Equip.	\$0	\$3,209,451	0.0%
Clothing & Shoes	\$2,096,005	\$82,544,002	2.5%
Jewelry & Luggage	\$938,743	\$7,137,706	13.2%
Sporting & Hobby	\$1,047,234	\$21,171,537	4.9%
Books & Music	\$208,657	\$12,410,644	1.7%
TOTAL	\$10,181,504	\$587,249,342	1.7%

Retail Market Discussion and Findings

The capture rates for convenience and shoppers goods are low in the Study Area, which indicates that there are opportunities to expand retail activity. Retail capture is lowest for grocery store expenditures, revealing potentially significant leakage in this category for the Study Area.

The arrival of the new Walmart Supercenter is expected to alter the retail landscape within the Study Area. This store will sell large volumes of both convenience and shoppers goods, and by drawing shoppers from locations beyond the immediate area, the Walmart Supercenter will significantly reduce the existing gaps in convenience and shoppers goods retail sales.

Additional retail development will likely occur in the area surrounding the Walmart site as retailers take advantage of the high volumes of consumer traffic drawn to the area by the Supercenter. Typically, such spinoff retail tends to consist of large-scale, specialty retailers that primarily sell shoppers goods, although some convenience goods retail may be represented. Properties along Lester Avenue north of Main Street provide appealing sites for new retail development.

However, given the proximity of the Oakdale Mall and several big box and neighborhood centers, the Study Area has much competition for both convenience and shoppers goods, and this competition could limit the local capacity for expansion by large-scale retailers. While

some expansion is likely, market constraints will determine the composition and volume of spinoff retail activity associated with the Walmart Supercenter.

Main Street provides an excellent setting for pedestrian-oriented retail. Future retail uses in this area should complement and not compete with Walmart offerings. Therefore, it may be beneficial to focus on specialty/boutique shoppers goods retail in and around the Main Street corridor. The relative prominence of jewelry, luggage and leather goods may reveal an existing draw for Study Area retail that could further be cultivated. If this is achieved, Walmart could induce more demand for new complementary specialty retail by creating a greater regional draw for consumers.

Overall streetscape/design improvements and added amenities along the Main Street corridor can help generate more appeal for retailers and consumers. In combination with renovated and/or new office development, new or renovated retail can help to promote revitalization of the Study Area.