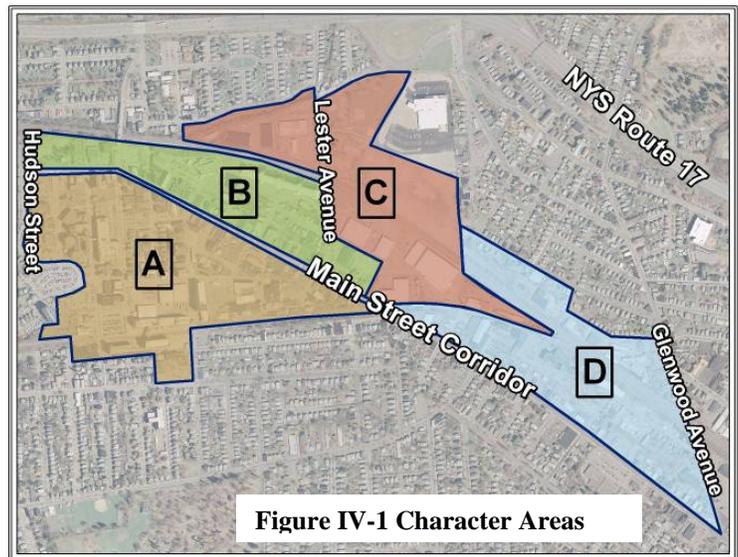


Section IV. Summary Analysis and Findings

A. Summary of Existing Conditions

1. Physical Conditions and Governing Regulations

The E-J BOA Study Area contains a diverse mix of land uses and character. In order to simplify discussion and presentation of a summary of physical conditions and governing regulations, the Study Area was divided into four Character Areas, each distinguished from the others by the unique character of its uses. Summary sheets were prepared for each Character Area and presented to the Steering Committee and general public. These sheets provide a description of each character area and summarize the area's zoning, available utilities, and transportation system. In addition, each summary sheet lists the public properties and the brownfield and underutilized sites located within the area. A copy of each summary sheet is located in this document following page 39. The boundaries of E-J BOA Character Areas A, B, C, and D are shown in *Figure IV-1 Character Areas*.



The boundaries of E-J BOA Character Areas A, B, C, and D are shown in *Figure IV-1 Character Areas*.

2. Character Area Analysis

Land use patterns and the scale of development were among the important characteristics used to define Character Area boundaries. While much of the Steering Committee and public discourse acknowledged the Character Areas as distinct areas, it should be noted that the linkages and relationships among these areas were considered as an important part of the process. A brief description of each Character Area is provided below.

Character Area A covers portions of the Study Area south of Main Street and east of Hudson Street. Wilson Hospital, the Goodwill Theatre Complex, and the pedestrian-friendly Main Street corridor are among the key features located in Character Area A. Aside from these assets, many

Character Area A properties contain large, vacant structures that were occupied by industrial operations in the past. These derelict properties contribute to the area's blighted condition, and present sound redevelopment opportunities due to their scale and proximity to key healthcare and cultural assets.

Character Area B covers portions of the Study Area north of Main Street, south of the rail lines, and east to Lester Avenue and the public library. Main Street is lined with pedestrian-friendly small shops and mixed-use properties, and public operations/facilities are concentrated in *Character Area B*. Village of Johnson City offices, the Johnson City Police Department, Your Home Public Library, and a post office are located here. North of Main Street, the large E-J Victory building at 59 Lester Avenue stands underutilized among a mixture of residential and small-scale commercial properties.

Character Area C consists of relatively large properties, many of which are used by warehouse/distribution, retail, or contracting operations. The area offers high visibility from Route 17, and a Walmart Supercenter is scheduled for development on a vacant 13-acre property north of the railroad tracks. CFJ Park provides a number of recreational facilities for residents, and features an historic carousel. This area has experienced investment, including the Walmart project and development of the Gannett publishing facility that borders the Study Area.

Character Area D covers the eastern portion of the Study Area, including the Main Street corridor and properties lining either side of the rail lines. Generally speaking, the properties lining this stretch of Main Street are auto-oriented. Properties along the rail lines are smaller in scale than some of those located further west; many of these properties support viable industrial-type uses, while others appear neglected. *Character Area D* includes the Main Street gateway between the City of Binghamton and the Village of Johnson City.

More detailed information about the physical conditions and zoning of each Character Area is presented on the following pages.

B. Summary of Market Analysis and Redevelopment Opportunities

Economic and Market Trend Analysis for the E-J BOA Nomination Study included a thorough review of area demographics, population and industry growth projections, and real estate market conditions. Field surveys and a series of interviews with community stakeholders were conducted to obtain key local knowledge regarding the Study Area. Following is a summary of market analysis findings in terms of the Study Area's strengths, weaknesses.

1. Study Area Strengths

- The Study Area is readily accessible from I-81, I-88 and NYS Route 17, which is due for conversion to I-86 in the near future.
- Wilson Hospital is a major employer in a regional growth industry, and can potentially serve as an anchor institution helping to draw related healthcare and other services, as well as housing, to the area.
- As an employment center, employees tend to commute into the Study Area on a daily basis.
- Fine arts and cultural uses are well represented in the Study Area: The Goodwill Theatre/Firehouse Stage Complex is located in the heart of the Study Area, as well as the Spool Art Gallery and other studios, are actively involved in building an arts community.
- The region's population is generally aging, and the Study Area's concentrated healthcare services may make it a suitable location for senior housing.
- The Main Street corridor provides a commercial gateway linking the City of Binghamton with Johnson City and Endicott.
- Existing water and sewer infrastructure is sufficient to support future development without constraints.
- Recent development activity includes development of the Gannett facility and proposed Walmart Supercenter north of the railroad tracks, and restoration of the Goodwill Theatre complex on Willow Street.
- A population of students and young professionals resides in the area, particularly along Main Street.
- The area's urban location provides an alternative to suburban office and/or industrial spaces.

2. Study Area Weaknesses

- Past industrial uses throughout much of the Study Area present environmental challenges for the redevelopment of brownfield sites.
- The region faces a trend of declining population, which is projected to continue in the near future.
- The regional real estate market is stagnant, with surpluses of office and industrial space in the region.

- Existing office space in the Study Area is primarily Class B, which has a 30% overall vacancy rate in the Greater Binghamton MSA compared to 10% vacancy for Class A office space.
- Residential portions of the Study Area are in a transitional state, and housing vacancy is high.
- Retail leakage from the Study Area is substantial.
- Below-grade rail lines limit connectivity between areas to the north and south.
- Most brownfield sites are not located directly along the Main Street corridor.
- Study Area streetscapes are relatively unappealing.

3. Summary of Redevelopment Opportunities for Brownfield Sites

The EJ-BOA Study Area provides a number of unique opportunities to develop large-scale properties in a highly accessible urban setting. Considering the Study Area brownfield properties in the context of the regional real estate market, many Study sites possess key locational advantages that enhance their development appeal.

Wilson Hospital supports hundreds of employees in medical and healthcare-related fields, and is a regional destination for medical services. State-of-the art services such as Cyber Knife treatment are offered by Study Area establishments associated with the hospital. Healthcare industries account for almost 20% of the Southern Tier Region’s projected growth from 2004-2014, so hospital-related spinoff growth represents a potentially viable development option for the Study Area. Practitioner offices, medical billing services, laboratory space, and hospital-related storage space are just a few examples of medical-related uses that may be viable in the Study Area.

The socioeconomic characteristics of the projected future population for the area indicate that there will be a significant growth in the 55-64 year age group referred to as “empty nesters.” This age group generally elicit a demand for apartments or condos located close to urban areas such as the Village of Johnson City. In addition, older age groups (65+) are also expected to experience relatively high population growth in the near future. This could create opportunities for “aging-in place” housing arrangements to be constructed within the study area. And lastly, the projected population growth in individuals age 25 to 34 in the region presents the opportunities for housing built or current residential structures to be renovated for graduate students and young professionals.

The concentrated nature of brownfield sites within the Study Area identified as *Character A* is favorable, as it provides an opportunity to redefine much of the central portion of the Study Area and ultimately, the Village of Johnson City. Several contiguous brownfield sites are located along the Corliss Avenue corridor in *Character Area A*, and adjacent Arch Street and Baldwin Avenue properties provide additional space for redevelopment.

Office and/or light industrial uses could take advantage of the Study Area's accessibility while enjoying the benefits of urban surroundings. A high-tech manufacturing operation has recently moved into the 18 Park Street/25 Ozalid Road property, providing a fine example of a manufacturing reuse with potential to serve as an anchor establishment in the future. National real estate trends indicate a renewed interest in urban office locations, and the Study Area's brownfield properties could allow the development of competitively priced, modern office space within close proximity to the Main Street commercial corridor and the Goodwill Theatre Complex, as well as Wilson Hospital. Flex development formats could accommodate the needs of various office, R&D, and/or light industrial uses in the area.

The Walmart Supercenter will increase flows of consumer traffic throughout the Study Area. Brownfield sites along Lester Avenue in *Character Areas B and C* are poised to benefit from increased exposure to Walmart customers. In the future, Study Area retail establishments – particularly those located along Main Street – should complement Walmart's comprehensive offerings by providing specialty retail and/or services. Increased exposure to retail customers will likely enhance the vitality of Main Street retail, in turn boosting the area's appeal by providing improved retail support services to nearby employees.