



TOWN OF CORNING

COMPREHENSIVE PLAN

ECONOMIC AND MARKET TRENDS ANALYSIS

JANUARY 2018



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Architecture
Environmental
Associates, P.C. | Planning

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COMPREHENSIVE PLAN

ECONOMIC AND TRENDS ANALYSIS

JANUARY 2018

Prepared for:

Town of Corning

Steering Committee:

Kimberly A. Feehan, Supervisor

Charles Coons

Pamela Bennett

Wayne Bennett

Jeffrey Brenning

Stan Gridley

Heather Hanson

Mike Quatrini

Mickey Sullivan

Matt Sousa, Steuben County Planning

Amy Dlugos, Steuben County Planning

Prepared by:

LaBella Associates

300 Pearl Street

Buffalo, NY 14202

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INTRODUCTION & PROJECT OVERVIEW

The following report has been prepared by LaBella Associates, D.P.C. as an amendment to the 2013 Town of Corning Comprehensive Plan. Although the community had been in a period of stagnation since its 1999 Comprehensive Plan was drafted, a new plan was needed to help it respond to swiftly changing conditions that may present new opportunities for growth and revitalization. These were:

- Development of the new Guthrie Corning Hospital in East Corning in the Town of Corning on the Chemung County line,
- Addition of a new 320-bed student residence hall to the Corning Community College Campus,
- Completion of the transition of State Route 17 to I-86, and
- The potential for Marcellus Shale hydrofracturing in New York and the impacts of the natural gas industry in nearby Pennsylvania on the Southern Tier.

The 2013 plan anticipated benefits of these developments, particularly of the hospital and student housing, for commercial development in Corning. However, as the economy in the Town has continued to languish, leaders and stakeholders saw that their main urgent need was for a direct conduit to regional economic development planning to bring it into consistency with regional goals and objectives as well as to provide a rationale for the town to access funding streams to upgrade its infrastructure and create additional opportunities to revitalize the community.

The purpose of this report is to provide an overview of the economic and market trends in and around the Town of Corning (see Figure 1), which will be taken into consideration in the evaluation of the various potential strategies for revitalizing the economy of the Town of Corning.

The Town of Corning is located in the southeast portion of Steuben County, New York. It includes the villages of Riverside and South Corning. The Town entirely surrounds the City of Corning. Its role has historically been that of a bedroom community for the City.

The areas of comparison used in this study include the following (see Figure 2):

- Town of Corning

- 14830 ZIP Code – which includes most of the Town of Corning, all of the City of Corning, and portions of the Towns of Erwin, Hornby, Lindley, Caton and Big Flats
- Steuben County, NY
- Elmira-Corning Combined Statistical Area (CSA)
- Southern Tier Region (Broome, Chemung, Chenango, Delaware, Schuyler, Steuben, Tioga, and Tompkins Counties)
- New York State

KEY FINDINGS

The Town of Corning boasts excellent road access with east-west state route 352 complementing I-86, the former State Route 17. State Route 415, another east-west highway, runs through the Village of Riverside to its end in the City of Corning. The main north-south corridor is State Route 414 which runs north from the City's downtown through the Town and on up to the Finger Lakes Region. Route 414 is a major tourism corridor providing access to Corning from points north including Finger Lakes Wine Country and Watkins Glen International to the Corning Museum of Glass. Route 414 carries a significant amount of traffic through the northwest area of the Town of Corning. State Route 225, another north-south highway, runs through the Village of South Corning to its end in the City of Corning.

The Town is located in Steuben County which is a part of the Southern Tier Regional Economic Development Council (REDCO). The state is broken down into 10 councils, each with the responsibility to develop and implement regional economic development planning. These plans form the basis for the State's funding strategies through its Consolidated Funding Application (CFA) process which provides a centralized hub for funding grant applications. The communities with the most successful funding track records are those that can show direct relationships between their community goals and objectives and their regional plans. Steuben County's Southern Tier Planning partners are Broome, Chemung, Chenango, Delaware, Schuyler, Tioga and Tompkins counties.

The 2016 Southern Tier REDC plan update focuses on Innovation Districts in and around Binghamton, Endicott and Johnson City; investment in advanced manufacturing; energizing the food and agriculture industry to expand food production, agricultural innovation and tourism; and promotion of the region's unique culture and environment of innovation as its chief strategies.

While the Town of Corning must certainly focus on strategies that meet those objectives, as well as the objective of the regional Urban Revitalization Initiative, more compelling for the Town is the I-86 Corridor Project. The Project focuses on an area from I-99 at the Pennsylvania border to its intersection with I-86 and east from there to the Elmira exchange on I-86. The Corridor Project key strategies are those with which the Town of Corning should align itself.

This report was prepared to assess opportunities in the Town in order to identify those that the Town is most ready to accommodate and assesses the assets that will be needed to attract the investments to lend new vitality to the economy and position the Town as an attractive base for commercial, industrial and residential activity.

Following are some key findings of this analysis as well as from the 2013 Town of Corning Comprehensive Plan:

- Easy access to employment centers makes the Town of Corning a desirable residential community of choice. However, as noted in *the I-86 Situation Analysis*, Corning lacks housing in the most popular price ranges of \$150,000 to \$175,000 and \$250,000 to \$300,000. Moreover, the age of the housing in the Town – most of it built before 1960 – suggests it is not well suited to contemporary needs.
- The *I-86 Innovation Corridor Housing Study* found a gap in expectations for single-family homes for sale in the entry market of \$90,000 to \$150,000. Typically, these homes are sold by estates or older owners and require substantial investment in upgrades. Generally the buyers at this level prefer a move-in ready home.
- The *Housing Study* found – and interviews with local property owners and employers confirm – a very tight market-rate rental housing market. There is a need for 140 to 170 additional units by 2020 in Western Chemung, Southeast Steuben counties and the Schuyler County community of Watkins Glen.
- The Town has a great deal of land that is not suitable for development because of environment and topography; much of the rest is located away from current development centers.

- Areas of vacant and underutilized land in the Town may warrant environmental investigation. Some of these investigations are already underway.
- Population decline and aging of the population will continue to challenge the community to 2030. Of course, a successful manufacturing or industrial comeback can shift this outcome by providing new jobs that will attract and retain workers and their families.
- As the *I-86 Innovation Corridor Workforce Development Report* found, the younger workforce is ill prepared to fill jobs that are available and considerable investments in workforce training are required to fill this gap.
- Steuben County saw declines in some of its legacy employment sectors between 2000 and 2016 but the rate of loss declined between 2010 and 2016. Likewise, the 14830 ZIP code saw declines in some of its legacy employment sectors between 2001 and 2016.
- Manufacturing, once the leading industry of employment in Steuben County has slipped to third place behind government and health care and social assistance. Manufacturing slipped from the second largest employment sector in the 14830 ZIP code to fifth behind health care and social assistance, government, management of companies, and accommodation and food services.
- Health care and social assistance, educational services, professional and business services, and accommodation and food services employment in the Southern Tier are expected to grow significantly through 2022. Health care and social assistance, professional, scientific, and technical services, other services, finance and insurance, and crop and animal production employment in the 14830 ZIP code are expected to grow significantly through 2026.
- Overall job growth in the Southern Tier is expected to top 16,000 jobs between 2012 and 2022. The 14830 ZIP code is expected to see an increase of 161 jobs between 2016 and 2026.
- A shift in growth industries reflects the growth of education and training in the county, as well as the emerging tourism sector.
- Among stable and prospering industries within Steuben County, professional services and agriculture, forestry, fishing and hunting had the highest proportion of growth in 2014 relative to their 2005 performance. Among

stable and prospering industries within the 14830 ZIP code, agriculture, forestry, fishing and hunting, arts, entertainment, and recreation, and utilities had the highest proportion of growth in 2016 relative to their 2006 performance.

RECOMMENDATIONS

Zoning:

The 2013 Town of Corning Comprehensive Plan recommended changes to the zoning map that would increase the amount of land where business uses would be allowed. LaBella supports these recommendations, with the following clarifications.

- Rezone land along the western extent of the north frontage of Route 352, approximately 250-300 feet deep, to Highway Business (B-2).
- Expand the Industrial (I) District at the former Hickling Power Plant north of the river on River Road.
- Retain Industrial (I) and Highway Business (B-2) zoning along Route 414.
- Allow small-scale commercial uses on the Corning Community College campus.

Details about the above recommendations can be found in the zoning section of this plan.

Sewer System:

The 2013 Town of Corning Comprehensive Plan endorses the recommendation of the I-86 Corridor plan that sewer service should be extended down Route 352 westward from the Town of Big Flats connection to the hospital. In the past, Town residents have resisted sewer expansion, because of the cost. However, the time may be right to revisit the idea and LaBella supports this recommendation. The benefits of making service available down Route 352 will extend to the Town as well as the entire region, and ensure Corning Guthrie Hospital as a regional hub for health care and health care services. Sewer service will make higher density development feasible and so when the expansion happens, the Town should revisit the densities in its zoning.

Residential Development:

Consistent with findings of the *I-86 Corridor Situation Analysis* and *I-86 Innovation Corridor Housing Study*, the Town should evaluate housing needs including single-

family housing development, opportunities to assist owners to upgrade and renovate older housing stock and rental market needs and inventory.

Target Industries:

Findings from the economic analysis result in the overall recommendations:

- Tables 7 and 8 depicting industry clusters for the 14830 ZIP Code and for the Town should be used as a guide for economic development targeting and retention but careful consideration should be given to each industry and the potential direct and indirect benefits each provides to the local economy as well as to regional objectives for economic development.
- The Town should partner with local and regional economic development officials to develop attraction and retention strategies for industry sectors such as professional and technical services, credit intermediation and related activities, nursing and residential care facilities, specialty trade contractors, truck transportation, hospitals, other information services, ambulatory health care services, food services and drinking places and mining.

Market Analysis:

Findings from the market analysis result in the following overall recommendations:

- ***Office Market:***
Projected demand for somewhere between 12,000 and 34,000 square feet of office space over the next 10 years – The Town is best suited for the addition of health care and social services office space related to the hospital on the eastern edge of the Town.
- ***Industrial Market:***
Projected demand for 1,500 square feet of industrial and/or warehouse/distribution space over the next 10 years – This is a very low projection, probably below the threshold of new construction. The potential for attracting a new manufacturing concern is a regional effort that, if successful, will likely require significant land for development or redevelopment. Rather than go it alone, the Town of Corning should actively participate in site selection discussions with local and regional economic development officials to market its unique sites for manufacturing.

- **Hospitality Market:**

At this point in time, additional hotels are not justified – The Town may want to work with regional economic developers to identify specific needs for office and accommodations near the new hospital so the two developments could support one another. If this avenue is chosen, it is imperative that a flag hotel of a known brand with a national reputation is recruited to operate the hotel.

- **Retail Development:**

Projected demand for 21,000 square feet of retail space over the next 10 years – The Town is best suited for automotive dealers, home furnishing stores, furniture stores, automotive parts/accessories/tire stores, building material and supply dealers, snack and nonalcoholic beverage bars, and lawn and garden equipment and supplies stores.

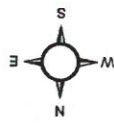
Leverage the opportunities of the new Corning Hospital and the addition of on-campus housing at Corning Community College – Small-scale eating and drinking establishments as well as health care related retail stores could flourish in the vicinity of the new hospital, especially as the area grows to include additional office space. Potential small scale developments such as coffee shops or small retail enterprises catering to student’s needs but with appeal to the general public – stationery and office supplies; books – could be located on the Corning Community College campus. If zoning restrictions in the area were to be lifted, sites adjacent to the college would also be appropriate for these uses.

Don’t bother trying to compete with big box retailers – The Town cannot compete with big box “category killers” and it should not try. It is a setting that is best for independent local retailers and small regional chains.

Alignment with the I-86 Corridor Project and Other Regional Plans:

A Recommendations and Implementation Strategy is included at the end of this document which lists recommendations from the 2013 Town of Corning Comprehensive Plan and this plan. It discusses the consistency of each recommendation to the I-86 Strategy and other regional planning efforts, suggests revisions to the recommendations in order to better align with the regional plans and assigns priority, responsibility, partners, cost, and funding opportunities for each recommendation.

**TOWN OF CORNING
ECONOMIC AND MARKET
TRENDS ANALYSIS**



**TOWN OF CORNING
(EXCLUDING VILLAGES)
BOUNDARY MAP**

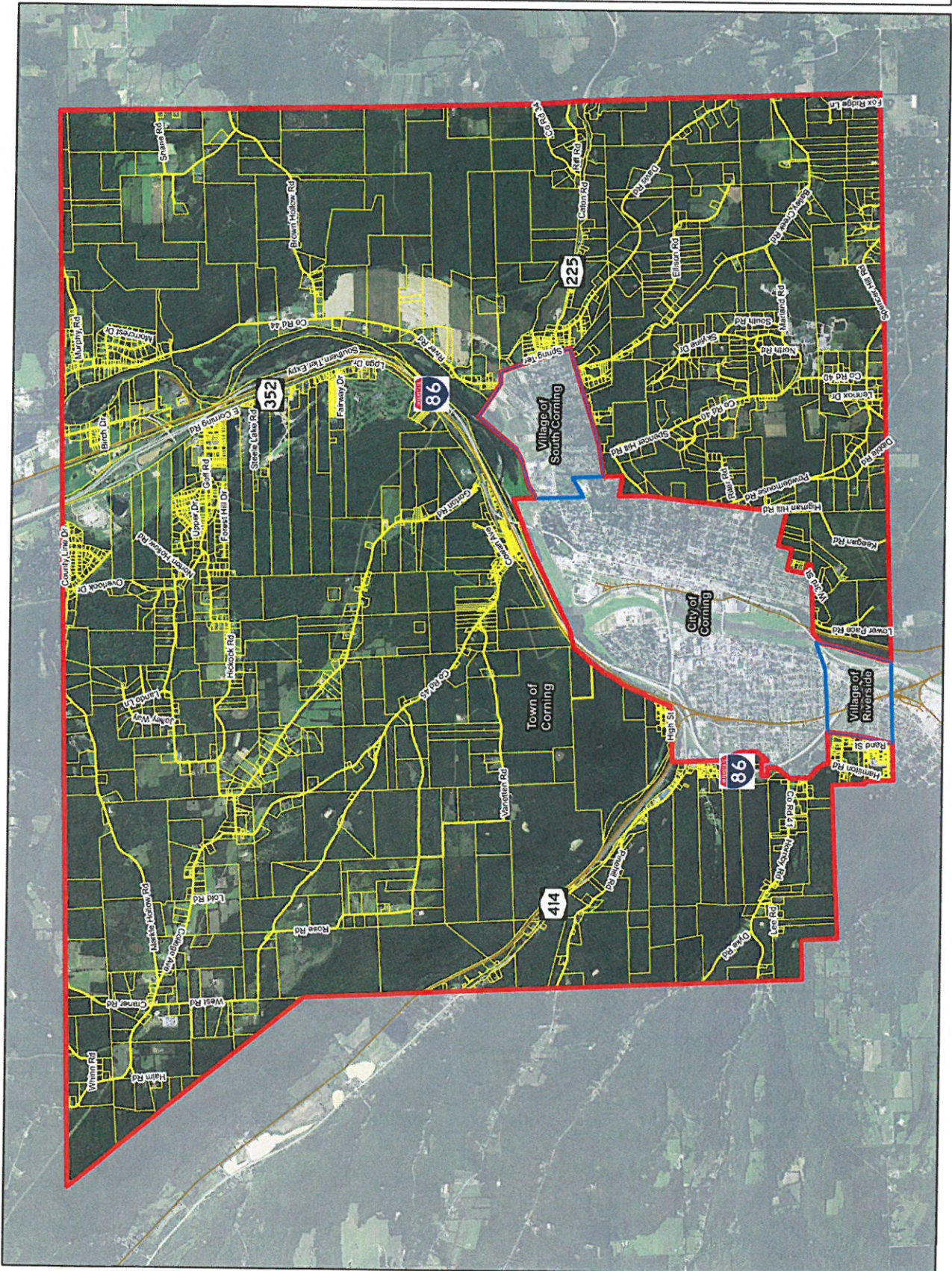
- Study Area: Town of Corning (excluding Villages)
- Villages (within Town but excluded from Study Area)
- Property Boundaries
- Railroad

Sources:
 1. Study Area Boundary: Created by Labelia using Parcel Boundaries
 2. Parcel Boundaries: Obtained from Stubben
 3. Roads and Railroads: Census Shapefiles from TIGER/line database
 4. Labels: Esri, Label, USA, USGS, AEX, Geocode, Geomapping, Aerial, IGN, IGT, and the GIS User Community



**Labelia Project No:
2161173**

**Figure 1: Town of Corning
(Excluding Villages) Boundary**



BACKGROUND REPORTS

A substantial amount of planning informs the effort to identify specific sectors of investment for the Southern Tier. These inform the effort to identify the niches that the Town of Corning can fill. Synopses of local and regional planning appear below.

Town of Corning Comprehensive Plan (2013): The Town of Corning's comprehensive plan focus is on two new major developments, the Corning Hospital and addition of student housing to Corning Community College. Regional forces impacting the Town include the potential for Marcellus Shale hydraulic fracturing as well as the designation of State Route 17 as Interstate 86. The plan also looks at options to revitalize the Town's utilities and infrastructure to better meet the current and future needs of Town residents, while also attracting new commercial enterprises. New water infrastructure is necessary to provide residents with clean, safe and drinkable water. Additional future infrastructure development includes the Town's sewer system. Plans include: upgrading current Town sewage treatment capacity, extending lines, and connecting in with the City of Corning sewer treatment plant.

Southern Tier Strategic Economic Development Plan (2011-2016): The plan's overall emphasis is on the Southern Tier's abundance of natural resources and on the Southern Tier's opportunity to work collaboratively with higher education. Focusing on its strengths, the plans focus looks to take advantage of the natural and agricultural resources that are available. Possible opportunities include extension of the growing season, creation of value-added products to support applications in the renewable energy industry and the promotion of regional products. The plan focuses on the revitalization of its downtown centers which would supplement the growing demand for commercial development, resident housing, and quality neighborhoods. To advance economic growth, infrastructures including the connection of broadband, highway, and rail networks are essential. Collaboration with Cornell and Binghamton University will aid in the redevelopment of the Southern Tier.

Southern Tier Strategic Economic Development Plan Progress Report (2016): In the five years since its initial economic development plan, the Southern Tier has advanced in several different ways. Over the period, 406 projects have been identified by the Southern Tier Regional Economic Development Council and supported through this process. An investment of \$269.8 million in public funds led to more than \$1.8 billion in private investment throughout the region. Recently, Dicks Sporting Goods store invested \$100 million in the greater Binghamton area. This new distribution center will create 466 full time jobs in the Southern Tier during

the coming five years. Updated plans include the innovation of the Greater Binghamton ecosystem, advancing and investing in the manufacturing industry, and transforming the food and agriculture industry. Other plans include the promotion of the Southern Tier's culture and the promotion of livable, desirable, and working communities.

Southern Tier URI (2015): The initiative was led by Governor Andrew Cuomo in 2015 to help revitalize three New York State regions. Based on the revitalization plan, the Southern Tier was awarded \$500 million. The Upstate Revitalization Initiative (URI) focused on four major components which include placemaking, workforce, tradeable sectors, and innovation. The revitalization of the Southern Tier aims to complete these four initiatives by building the Greater Binghamton Innovation Ecosystem, investing in advanced manufacturing, transforming the food and agriculture industry, and promoting the Southern Tier's innovative culture.

Steuben County Annual Report (2016): This report on the activities of the Steuben County Industrial Development Agency focuses on the Agency's major development efforts in 2016. These include Phase I of the school for nursing and health care careers redevelopment located at the former Corning Hospital site. Phase II of the project includes residential development to support the growing demand for downtown living options in the City of Corning. Other recent agency efforts include a new hotel in Urbana for tourist and visitor accommodations, development of a rail system, integration of new industry, and a cultural hub center.

Southern Tier Global Marketing and Export Strategy (2014): The Southern Tier has a rich export business with agriculture being one of its main exports. It also has the opportunity to be global exporters of high tech and tech transfer products. The Southern Tier's energy companies, technology, and food and agricultural interests have great potential for foreign investment. Wine Trail organizations as well as the Corning Museum of Glass have become huge tourist attractions, with many international visitors. Overall the opportunities for global growth in the Southern Tier include economic growth, creation of jobs, global marketing, foreign trade and foreign investment.

I-86 Innovation Corridor Strategic Action Plan (2015): The plan is designed to encourage public/private investment, create job opportunities, advance regional competitiveness, and create an environment in which a young, skilled workforce can participate. The overall vision is to create an area that is distinguished for its concentration of multinational anchor companies, advanced infrastructure to support innovation and technology, rich educational and research opportunities, skilled

workforce, and vibrant communities. The Strategic Action Plan is a big-picture framework to guide communities – including the Town of Corning –with action steps and tactics to achieve economic vitality within the context of the strategic priorities of the Strategy: Leadership/Innovation, Business Development/Human Capital, Vibrant Communities and Built Environment, and Identity and Marketing.

I-86 Corridor Project Situation Analysis (2015): This report provides a socio-economic snapshot of the I-86 corridor communities and an analysis of corridor strengths and challenges. Steuben County faces an aging population. It is important to continually succeed in educational attainment for future development of the County. Currently, many households face income challenges, specifically in the age group of 65+. Many families are also living below the poverty line. New economic development and growth ideas include developing the downtown area, creating quality healthcare, providing efficient and quality schools and providing basic services such as shopping, recreation, and entertainment centers. New development will help lower the County's 6.7 percent unemployment rate which is well above the state average of 5.8 percent. Continuing to invest and further developing the I-86 corridor will help to return Steuben County and other nearby counties to prominence.

I-86 Innovation Corridor Workforce Development Report (2016): This report was prepared by a study group of the I-86 Innovation Corridor Workforce Work Group to report on its activities and findings. The Work Group finds that a significant gap exists in the existing workforce and that needed to meet marketplace demands for workers in education and health care as well as advanced manufacturing and service enterprises. The issue is not the size of the existing workforce, but rather its skill set and training. These, combined with overall population decline, an aging workforce and a young workforce without the necessary qualifications for available openings triggered significant labor supply issues. The report provides synopses of recruitment and retention strategies, training, family and child-support systems, and best practices.

I-86 Innovation Corridor Housing Study: 2017-2020 (2017): This study confirms and expands on the findings of the Situation Analysis regarding the state of the region's housing market. The study looked at housing in the Western Chemung and Southeast Steuben counties and the Schuyler County community of Watkins Glen. Housing values are appreciating the target area, and sale prices are rising. However, the housing market is hampered by the age and condition of housing and lack of available for-sale and rental stock. The lower price points, in the \$90,000 to \$150,000 range turn out to require significant investment to meet buyers' expectations for move-in

ready housing. Tax adverse buyers are buying in rural areas rather than in more densely populated areas like the cities of Corning and Elmira. New hiring and recruitment to the area are putting pressure on the \$175,000-\$225,000, \$225,000-\$275,000 and \$275,000-\$350,000 price ranges. Meanwhile, rental housing is in short supply in all price ranges. A demand of 140 to 170 units is predicted based upon housing needs for medical residents and upper income empty nesters, with the highest demand from young professionals, middle managers and educators.

I-86 Innovation Corridor 2017 Annual Progress Report (2017): An assessment of the accomplishments of the region in 2017. Four major business development wins are noted: Emhart Glass (110 jobs retained), DeMet expansion (200 jobs retained, 70 new jobs), (Three Cities Inc. and FedEx (130 new jobs). The progress report updated the corridor job forecast, based upon interviews and input received for the housing study (above) and now estimating that 1,600 new jobs will be created in the corridor between 2018 and 2020. Much of the report is a listing of new projects underway in in the pipeline.

Steuben County Agricultural Protection Plan (2015): This plan is a framework for protecting farmland for current and future conditions of Steuben County. Five goals were envisioned to further develop the agribusiness sector: 1. Economic Development, to support the growth of existing farms and agribusiness; 2. Agribusiness Development, which focuses on new opportunities for farmers and the agribusinesses; 3. Farmland Preservation, to maintain, protect and enhance the County's natural resources; 4. Agri-Tourism, which aims to attract visitors to the County to experience the local farm products and experiences; and 5. Education, Outreach and Partnerships, this helps engage the farming community and residents in the County and develops partnerships with local organizations. This plan also promotes internal growth, including a County slaughterhouse for farmers use and in return keeps money within the County.

Steuben County: State of the Agricultural Economy (2014): The County is known for its large agricultural economy. Fifteen percent of the County employment belongs to the agriculture sector. Agricultural economic benefits have led to many other job creations including industry, local government, retail goods, banking, education, insurance and more. With over 420,000 acres of farmland, Steuben County is New York State's largest agricultural hub. With 47 percent of the land in Steuben County dedicated to farming, the economic emphasis on increasing wages and working to support an agriculturally based economy becomes very important.

Southern Tier Central Comprehensive Economic Development Strategy Update (2017):

Southern Tier Central (STC) is looking toward the future as the next generation of young workers start their careers. STC looks to take advantage of their low wages, existing infrastructure, and business friendly environment. Although the STC region has experienced challenges with retaining jobs, and keeping up with the state average wage, new strides have been developed to push towards parity with the nation. Manufacturing, healthcare, and educational employment look to be the anchor for STC's economic future. Recent planning efforts have looked at creating vibrant communities/downtowns, quality school districts, and care and support for the aging population. Recent plans completed include the I-86 Corridor project and.

Southern Tier Central Comprehensive Economic Development Strategy (2015): The

Southern Tier Central (STC) region is hindered by its aging population and younger people who are not pursuing higher education but are also not entering the workforce. A major trend toward economic prosperity includes vibrant, urban –centric communities for young families and young workers. A wide array of jobs and expanding educational opportunities look to anchor the future of STC. Recent efforts toward increased education include Corning Community College and its opening of its new welding training facility. Planning efforts have included the I-86 corridor project which has looked to provide vibrant communities and many potential job opportunities. Furthermore, with a rising economic base and an influx of young millennials, the STC region looks to become a prosperous and thriving area.

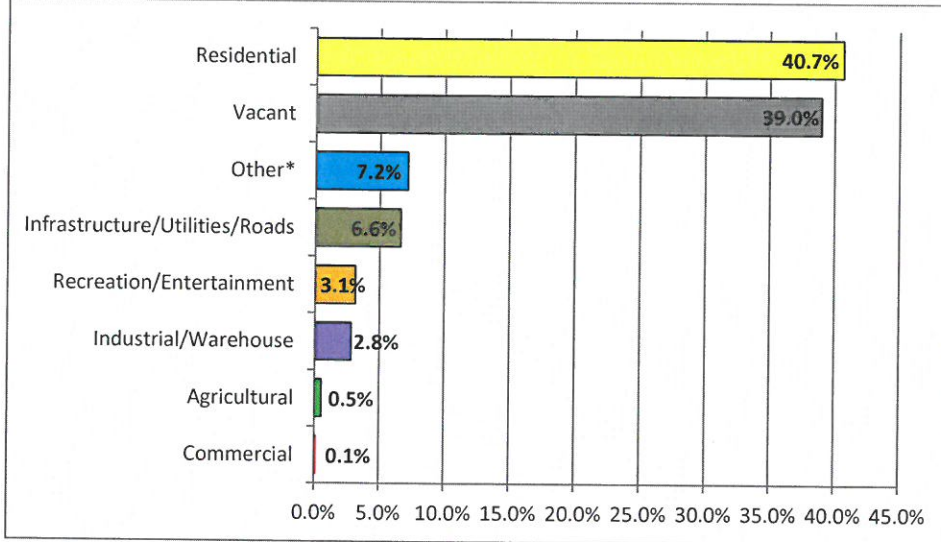
Southeast Steuben River Vision Project: The vision focuses on revitalizing the Chemung

Valley Greenway as well as creating better waterfront access and more trails and bike paths. Development of the river would help tourism in the area as well as give residents a sense of place. In 2007, the Chemung River Comprehensive Plan was created in order to develop a more cohesive organization of the development of facilities and other projects along the Chemung River. Recently Steuben County was awarded a waterfront revitalization program by NYS in order to support the ongoing efforts of the Southeast Steuben River Vision Project. The final product of the River Vision looks to fill in the current gaps in the trail system and will improve trail systems and quality of life for the five river communities.

LAND USE ANALYSIS

The Town of Corning (excluding the Villages of Riverside and South Corning) encompasses approximately 23,279 acres of land and water. Chart 1 shows the breakdown of current land use by percent of total acreage. A full breakdown of the Town of Corning land uses and relevant characteristics can be found in Appendix A.

Chart 1: Land Use by Percentage of Total Area



Note: * Other land uses include private wild and forest land, government/institutional uses, and the Chemung River
Source: Town of Corning Real Property Data as provided by Steuben County with minor updates by LaBella

Major items of note include:

- Land is dominated by residential and vacant uses. These uses account for nearly 80 percent of the land area.
- Most of the vacant land appears to be forested and tends to be in hilly areas of the Town.
- Only 0.1 percent of the land area is used for commercial purposes. These uses tend to be located along major roadways such as NY-352 and NY-414.

EXISTING ZONING

The Town’s zoning accommodates business development with two zoning districts: Highway Business (B-2) and Industrial (I). Two areas are zoned Planned Development (PD), which allows a mix of uses subject to a site plan approved by the Town Board.

Table 1: Zoning Summary

Permitted Uses in B-2 Highway Business	
Permitted Uses	Conditional Permit Uses
Agricultural roadside stand	Single-family dwelling**
Agriculture (Greenhouses and Nurseries)	Boarding House
Agriculture (not including the keeping of fowl or livestock)	Multi-family dwelling
Cultural facilities (library, art gallery, museum, etc.)	Cottage, Camp, or Cabin Development
Garage or Barn (primary use)	Hospital or sanitarium
	Nursing or convalescent home
	Public utility or transportation use
	Signs - High Rise
	Vacation resort hotel, motel
	Home occupation
	Automobile sales and repair
	Bowling alley
	Car washing station
	Drive-in movie
	Equipment rental or sales yard
	Funeral Home
	Gasoline filling station
	Laundry or dry cleaning plant
	Newspaper offices and printing shops
	Office building (general and professional)
	Restaurant
	Retail business or service, not otherwise listed
	School conducted for profit
	Self-service laundry
	Theater or concert hall
	Veterinarian office/hospital, kennels and grooming.
	Wholesale business or services
	Manufacture, fabrication, assembly, warehousing and other handling of material
	Research laboratories
	Storage facility - indoor

** With Conditional Use Permit for pre-existing single family dwellings

Permitted Uses in the I Industrial District	
Permitted Uses	Conditional Permit Uses
GENERAL USES	
Agricultural roadside stand	Public utility or transportation use
Agriculture (Greenhouses and Nurseries)	Signs - High Rise
Agriculture (including the keeping of fowl, or livestock)	Wind mills (energy or water production)
Agriculture (not including the keeping of fowl or livestock)	
BUSINESS USES	
Garage or Barn (primary use)	Adult Uses
	Automobile sales and repair
	Equipment rental or sales yard
	Gasoline filling station
	Laundry or dry cleaning plant
	Newspaper offices and printing shops
	Restaurant
	Restaurant
	Manufacture, fabrication, assembly, warehousing and other handling of material
	Wholesale business or services
INDUSTRIAL USES	
	Contractor's yard
	Extractive operations and soil mining
	Research laboratories
	Storage facility - indoor
	Storage facility - outdoor
	Trucking terminal
	Warehouse

FINDINGS AND RECOMMENDATIONS

The 2013 Town of Corning Comprehensive Plan explored opportunities to increase business development along Route 414 and along Spencer Hill Road at Corning Community College, and along the eastern portion of Route 352 near the new hospital. In order for the Town to achieve its goals for sustainable economic vitality, the 2013 Master Plan also recommended changes to the zoning map that would increase the amount of land where business uses would be allowed (see Proposed

Zoning map, page 93 of the 2013 plan). LaBella supports these recommendations, with the following clarifications.

- **Rezone land along the north frontage of Route 352, approximately 250-300 feet deep, to Highway Business (B-2).**
 - The Town should revisit the list of uses permitted in the B-2 district to allow a broader range. Design standards should consider design-based codes that address access, appearance and conservation of natural resources.
 - Rezoning is a necessary step but will not be sufficient on its own to attract suitable business development to this corridor. Much of the land consists of formerly mined lands, mined material storage areas, and ponds. The cooperative of land owners, neighboring businesses and residents with the Town and developers will be crucial to success here.
 - Topography is a challenge, especially east of Goff Road. Access roads and redesigned intersections may be needed to connect to the highway.
 - Consider a service access road parallel to Route 352 to provide access to businesses.
 - Consider requiring appropriate buffers between the businesses along Route 352 and the existing and future residential and recreational uses to the rear.
 - Residential and waterfront uses may be enhanced with commercial recreation and/or resort uses.
- **Expand the I Industrial district at the former Hickling Power Plant north of the river on River Road**
 - The site of the former power plant is suitable for future industrial development.
- **Retain I Industrial and B-2 Highway Business zoning along Route 414**
 - The existing boundaries of the I- and B-2 zoning districts appear reasonable.
 - The I Industrial zone along Route 414 is within a regulated flood hazard area. Building construction and grading must comply with flood protection standards.
- **Allow small-scale commercial uses near Corning Community College**
 - Neighborhood-oriented commercial uses such as coffee shops, restaurants and small retail and service establishments could be accommodated in this primarily residential area.
 - Zoning should be modified to allow such uses in this area and possibly other residential areas. Consider an overlay zone.

ECONOMIC TRENDS & INDICATORS

DEMOGRAPHICS

The population in the Town of Corning¹ has declined approximately 2.1 percent between 2000 and 2015 while Steuben County’s population declined 0.1 percent over the same time period (Table 2). While there was a slight increase in population from 2010 to 2014 in the Town, long-term population projections for Steuben County indicate a continued decline.

Table 2: Population Trends – Town of Corning and Steuben County - 2000-2015

Area	Population (Year)			Change 2000-2010		Change 2010-2015		Net Change 2000-2015	
	2000	2010	2015	#	%	#	%	#	%
Town of Corning	6,426	6,270	6,294	-156	-2.4%	24	0.4%	-132	-2.1%
Steuben County	98,726	98,990	98,665	264	0.3%	-325	-0.3%	-61	-0.1%

Source: US Census Bureau 2000 and 2010 SF1 Decennial Census, American Community Survey 2011-2015 Estimates

In general, the median age of the population has increased between 2000 and 2015 (Table 3). The median age of residents in the Town of Corning is older than that of Steuben County. The Town’s median age has been increasing at a greater rate than that of the County’s.

Table 3: Trends in Median Age – Town of Corning and Steuben County - 2000-2015

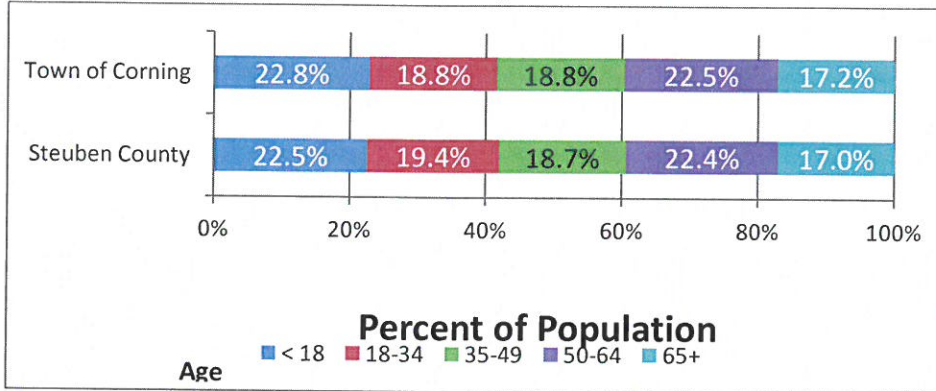
	2000	2010	2015	% Change 2000-2010	% Change 2010-2015	% Change 2000-2015
Town of Corning	39.2	42.7	43.3	8.9%	1.4%	10.5%
Steuben County	38.2	41.4	42.0	8.4%	1.4%	9.9%

Source: US Census Bureau 2000 and 2010 SF1 Decennial Census, American Community Survey 2011-2015 Estimates

The Town of Corning has a larger percentage of dependents under the age of 18 and seniors 65 years old and older as compared to Steuben County (Chart 2).

¹ Throughout the *Demographics* and *Household Income and Poverty* subsections, the Town of Corning refers to the entire Town (i.e. it includes the Villages of Riverside and South Corning)

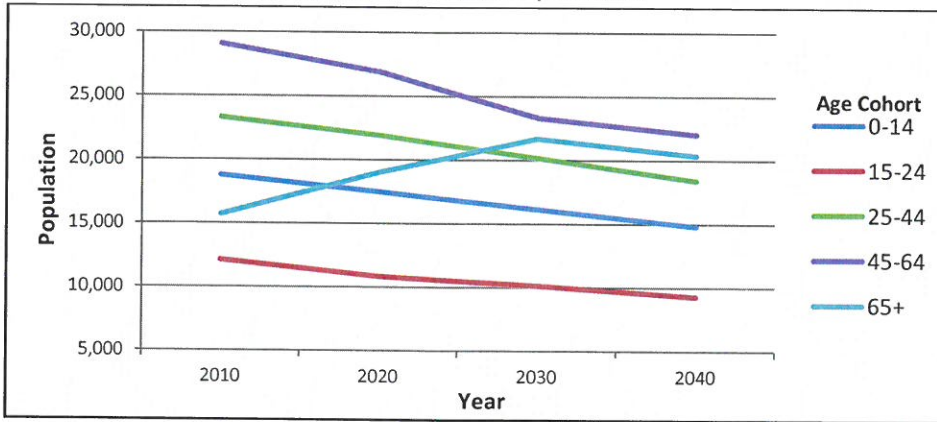
Chart 2: Age Cohorts – Town of Corning and Steuben County - 2015



Source: American Community Survey 2011-2015 Estimates

The total population in Steuben County is expected to decline nearly eight percent between 2010 and 2030, and decline an additional seven percent between 2030 and 2040 (Chart 3). This trend of decline is expected for all age cohorts except the 65+ age cohort. Instead, the 65+ age cohort is expected to increase nearly 40 percent between 2010 and 2030.

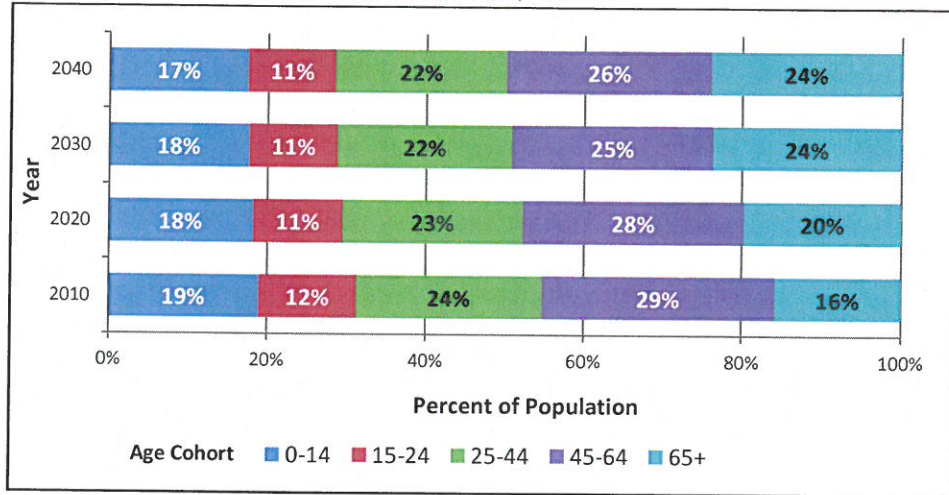
Chart 3: Population Projections by Age Cohorts - Steuben County - 2010-2040



Source: US Census Bureau 2010 SF1 Decennial Census, Cornell University Program on Applied Demographics

The trends of an overall declining population and an increasing 65+ age cohort indicate a general aging of the population in Steuben County (Chart 4). By 2030, nearly 50 percent of the population will be over 45 years of age.

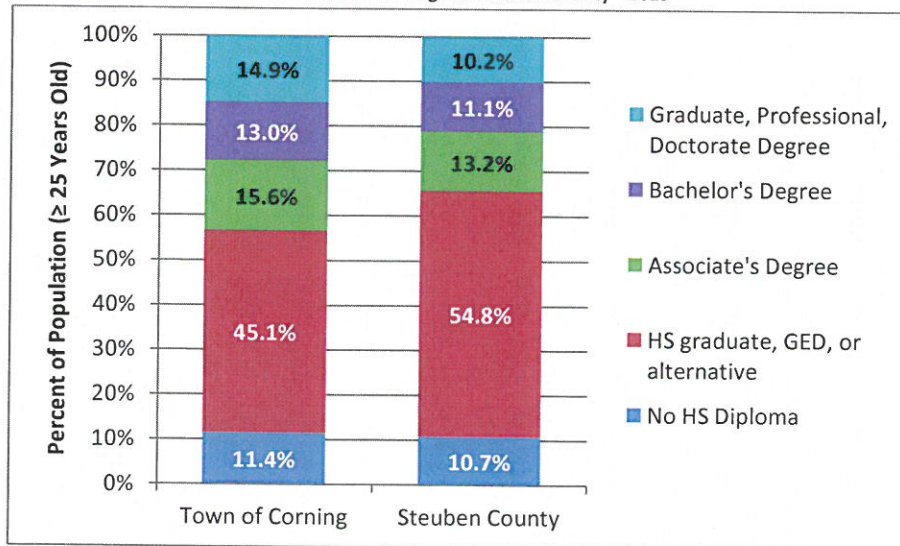
Chart 4: Age Cohort Distribution Projections - Steuben County - 2010-2040



Source: US Census Bureau 2010 SF1 Decennial Census, Cornell University Program on Applied Demographics

The Town of Corning’s residents are well educated compared to Steuben County (Chart 5). Nearly 44 percent of the Town’s population (≥ 25 years old) has obtained a college degree compared to the County’s nearly 35 percent.

Chart 5: Educational Attainment – Town of Corning and Steuben County – 2015



Source: American Community Survey 2011-2015 Estimates

HOUSEHOLD INCOME AND POVERTY

The median household income for the Town of Corning has historically been greater than that of Steuben County households (Table 4). While it appears as if the median household income has increased since 2000, when taking into account inflation, the median household income has actually decreased by nearly 10 percent in the Town and only four percent in the County. Despite this fact, Town households still have greater buying power than their County counterparts.

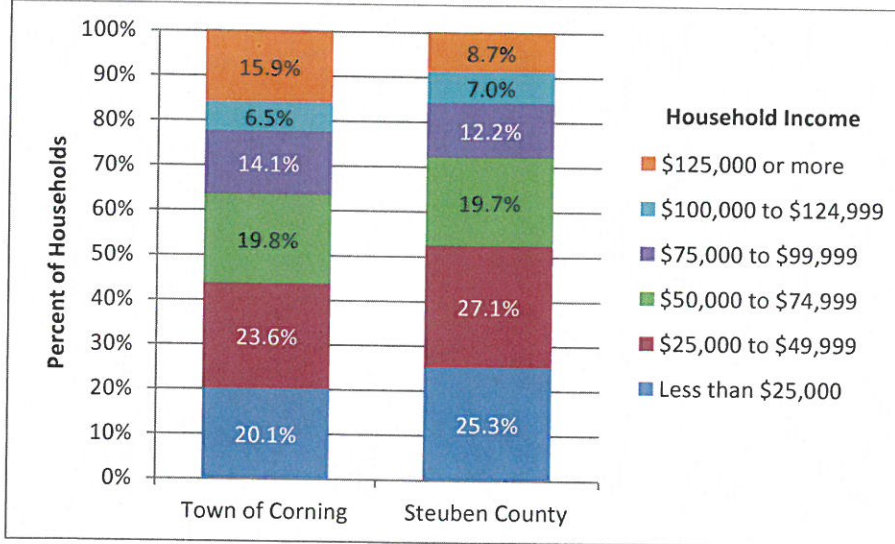
Table 4: Median Household Income – Town of Corning and Steuben County - 2000-2015

Area	Median HH Income (Year)			% Change 2000-2010	% Change 2010-2015	% Change 2000-2015
	2000	2010	2015			
Town of Corning	\$44,649	\$52,750	\$55,927	18.1%	6.0%	25.3%
Steuben County	\$35,479	\$43,867	\$47,280	23.6%	7.8%	33.3%
	Adjusted for Inflation to 2015 \$					
Town of Corning	\$61,817	\$56,893	\$55,927	-8.0%	-1.7%	-9.5%
Steuben County	\$49,121	\$47,313	\$47,280	-3.7%	-0.1%	-3.7%

Source: US Census Bureau 2000 Decennial Census, American Community Survey 2006-2010 & 2011-2015 Estimates; Bureau of Labor Statistics' US Inflation Calculator <<http://data.bls.gov/cgi-bin/cpicalc.pl>>.

Reflective of the median household incomes, Town of Corning households tended to have higher incomes than Steuben County households. About 56 percent of Town households have an annual income greater than \$50,000 compared to 48 percent of County households. The Town has nearly twice as many households with annual incomes of \$125,000 or greater as compared to the County.

Chart 6: Household Income – Town of Corning and Steuben County – 2015



Source: American Community Survey 2011-2015 Estimates

The poverty rate in the Town of Corning has historically been lower than that of Steuben County as a whole (Table 5). However, it should be noted that the percentage of individuals living below the poverty rate has generally been increasing. The poverty rate in the Town increased 4.0 percentage points from 2000 to 2010 and decreased 3.7 percentage points between 2010 and 2015 leaving a 0.3 percentage point increase in poverty since 2000. In 2015 the Town’s poverty rate was about half of the County’s rate.

Table 5: Poverty Trends – Town of Corning and Steuben County – 2000-2015

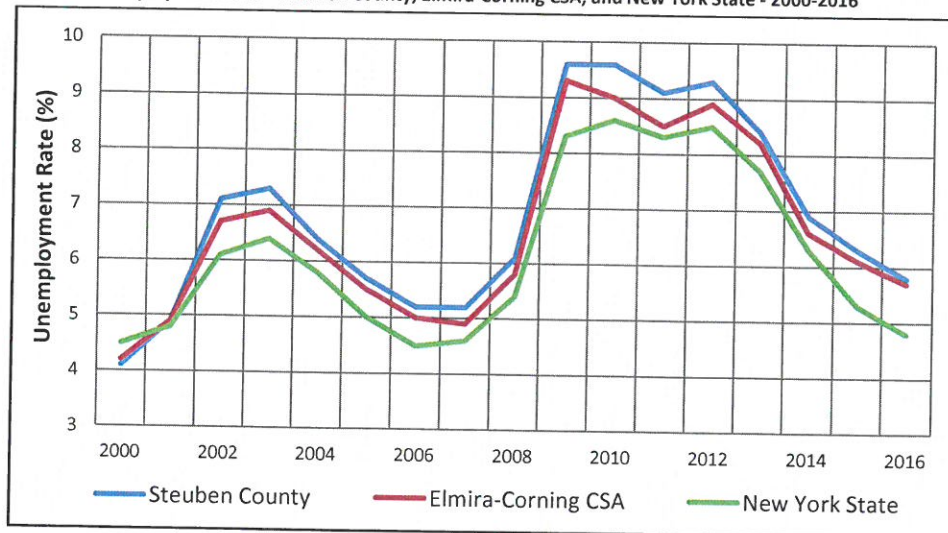
	2000	2010	2015	% Pt Difference 2000-2010	% Pt Difference 2010-2015	% Pt Difference 2000-2015
Town of Corning	8.2%	12.2%	8.5%	4.0%	-3.7%	0.3%
Steuben County	13.2%	13.5%	16.3%	0.3%	2.8%	3.1%

Source: US Census Bureau 2000 Decennial Census, American Community Survey 2006-2010 & 2011-2015 Estimates

INDUSTRY AND EMPLOYMENT

Since 2001, the trends in the unemployment rate in Steuben County have been consistent with those in the Elmira-Corning region, as well as of New York State. Steuben County however, has consistently had a higher unemployment rate than the Elmira-Corning region and New York State, quite significantly so in some years. As can be seen in Chart 7, all three geographic areas have seen a significant decrease in their unemployment rate since 2012. This drop is expected to continue, and can be attributed to a variety of factors, including the recovering economy, economic development efforts in the region, and significant investments in the area.

Chart 7: Unemployment Rate – Steuben County, Elmira-Corning CSA, and New York State - 2000-2016



Source: New York State Department of Labor – Labor Force & Unemployment Data

Since 2000, the number of businesses in Steuben County has grown by 4.8 percent (Table 6). Growth was not realized in all industries however, as declines were seen in six of the 21 industry sectors in Steuben County between 2000 and 2016. The most notable losses occurred in the Retail Trade, Real Estate and Information sectors. However, gains were seen in the number of Administrative, Waste Management, Government, and Agriculture/Forestry/Fishing/Hunting establishments.

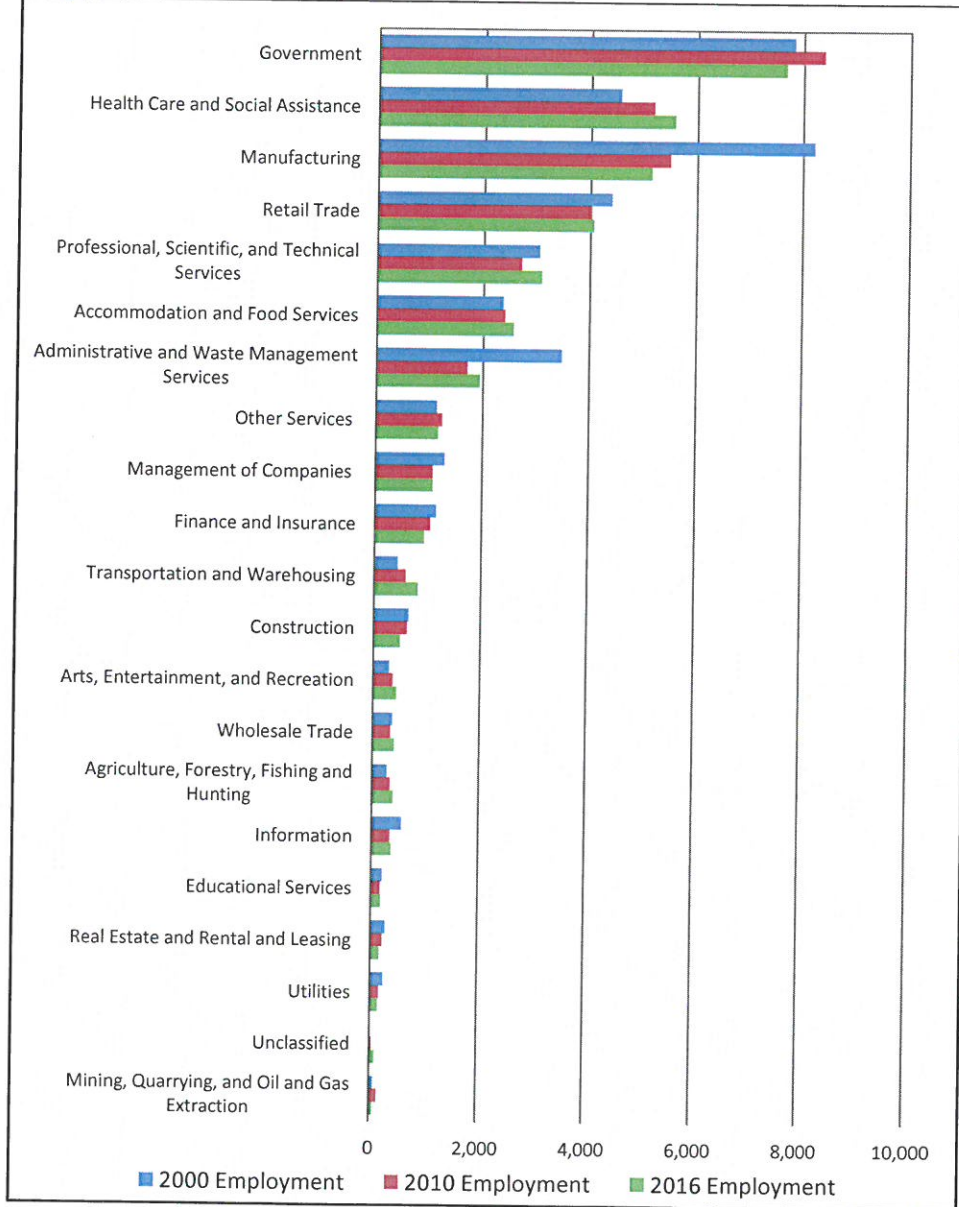
Table 6: Industry Establishment Trends – Steuben County – 2000-2016

Industry Sector	Steuben County - Establishments				
	2000	2010	2016	% Δ 2000-2016	% Δ 2010-2016
Agriculture, Forestry, Fishing & Hunting	36	50	57	58.3%	14.0%
Mining, Quarrying, & Oil & Gas Extraction	8	14	13	62.5%	-7.1%
Utilities	4	7	8	100.0%	14.3%
Construction	130	152	145	11.5%	-4.6%
Manufacturing	83	77	78	-6.0%	1.3%
Wholesale Trade	61	52	57	-6.6%	9.6%
Retail Trade	375	315	306	-18.4%	-2.9%
Transportation & Warehousing	48	58	59	22.9%	1.7%
Information	43	32	29	-32.6%	-9.4%
Finance & Insurance	101	102	103	2.0%	1.0%
Real Estate & Rental & Leasing	71	60	53	-25.4%	-11.7%
Professional, Scientific, & Technical Services	130	155	130	0.0%	-16.1%
Management of Companies	13	19	20	53.8%	5.3%
Admin. & Waste Management Services	60	70	94	56.7%	34.3%
Educational Services	13	10	12	-7.7%	20.0%
Health Care & Social Assistance	228	253	236	3.5%	-6.7%
Arts, Entertainment, & Recreation	26	31	31	19.2%	0.0%
Accommodation & Food Services	203	205	203	0.0%	-1.0%
Other Services	220	215	222	0.9%	3.3%
Government	183	194	208	13.7%	7.2%
Unclassified	6	41	77	1183.3%	87.8%
Total	2,042	2,112	2,141	4.8%	1.4%

Source: Quarterly Census of Employment & Wages – New York State and U.S. Bureau of Labor Statistics

The top industries for employment in 2000 in Steuben County were Manufacturing, Government, and Health Care and Social Services (Chart 8). Government has grown to be the largest employer despite substantial losses in employment between 2010 and 2016. Manufacturing has slipped to the third largest employer having experienced significant losses in employment between 2000 and 2010. Health Care and Social Services employment has been steadily increasing in Steuben County.

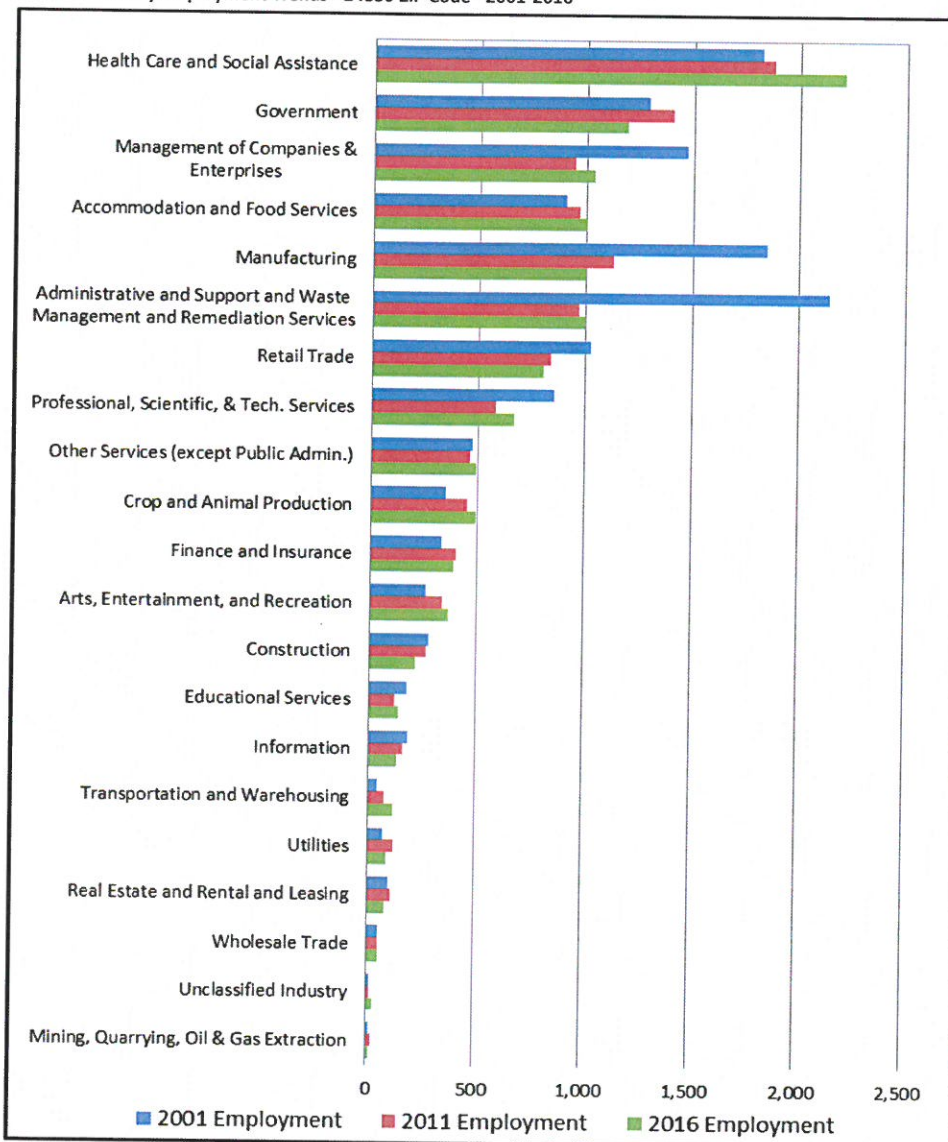
Chart 8: Industry Employment Trends - Steuben County - 2000-2016



Source: Quarterly Census of Employment & Wages – New York State and U.S. Bureau of Labor Statistics

Zooming in closer, the top industries for employment in 2001 in the 14830 ZIP code (which includes most of the Town of Corning, all of the City of Corning, and portions of the Towns of Erwin, Hornby, Lindley, Caton, and Big Flats) were Administrative and Waste Management Services, Manufacturing, and Health Care and Social Services (Chart 9). Health Care and Social Services has grown to be the largest employer. Despite decreases in raw numbers, Government has risen to the second largest employer while Management of Companies has risen to the third. Accommodation and Food Services and Manufacturing round out the top five employers. The 14830 ZIP code lost more than 2,200 jobs between 2001 and 2016.

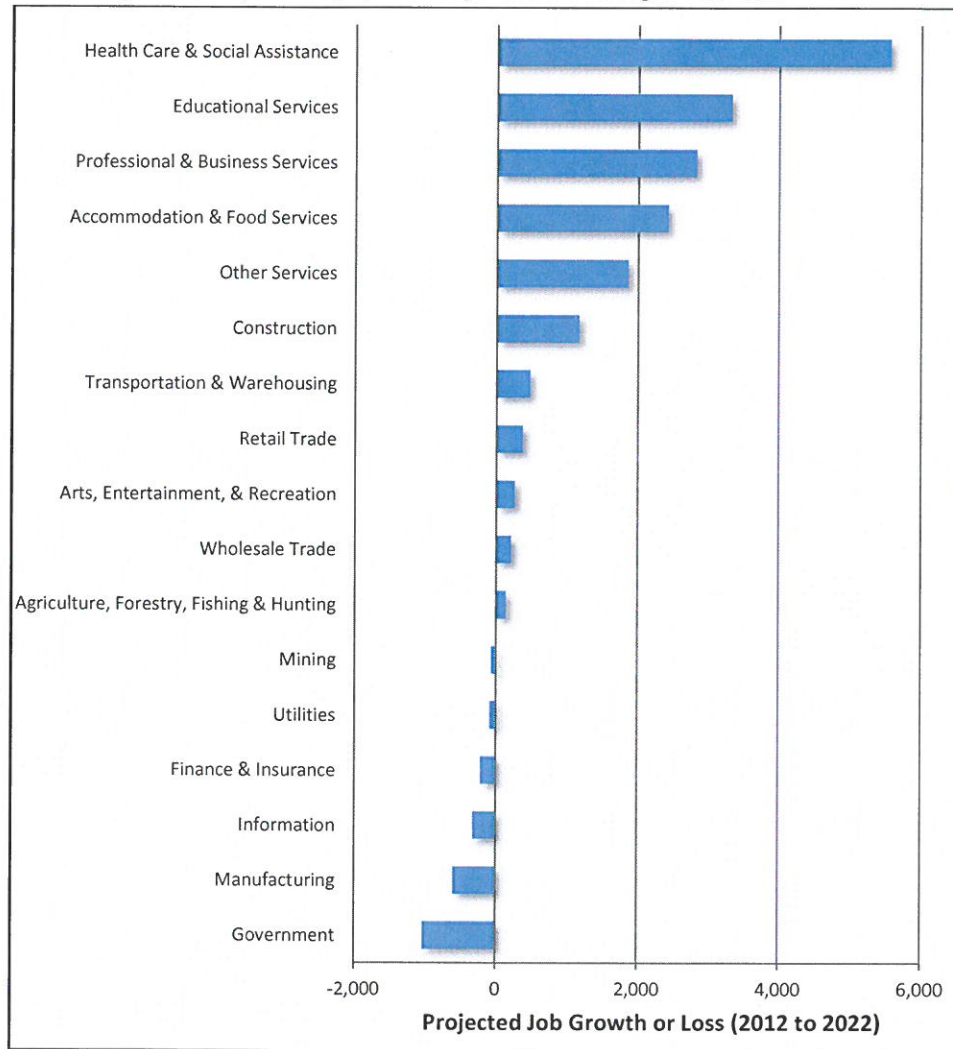
Chart 9: Industry Employment Trends - 14830 ZIP Code - 2001-2016



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

Health Care and Social Assistance, Educational Services, Professional and Business Services, and Accommodation and Food Services employment in the Southern Tier Region are expected to grow significantly through 2022 (Chart 10). Overall, employment is expected to grow by approximately 16,400 jobs from 2012 to 2022 within the Southern Tier Region.

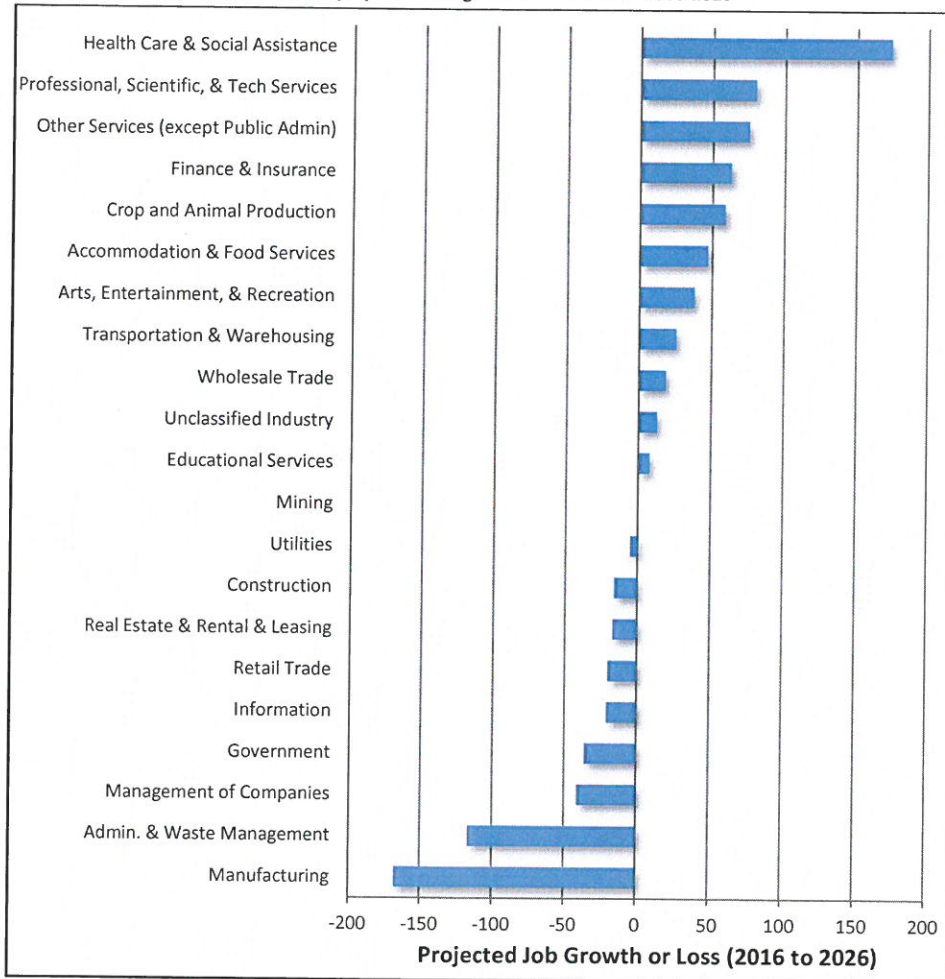
Chart 10: Projected Industry Sector Employment Change – Southern Tier Region - 2012-2022



Source: New York State Department of Labor – Long Term Industry Projections

As a matter of proportion, the Town of Corning would only be able to expect an extremely small portion of employment growth within the Southern Tier Region and industry sector employment projections may differ at a smaller scale. As such, employment projections were also obtained for the 14830 ZIP code. Health Care and Social Assistance, Professional, Scientific and Tech Services, Other Services, and Finance and Insurance employment in the 14830 ZIP code are expected to grow significantly through 2026 (Chart 11). Overall, employment within the 14830 ZIP code is expected to grow by approximately 161 jobs from 2016 to 2026.

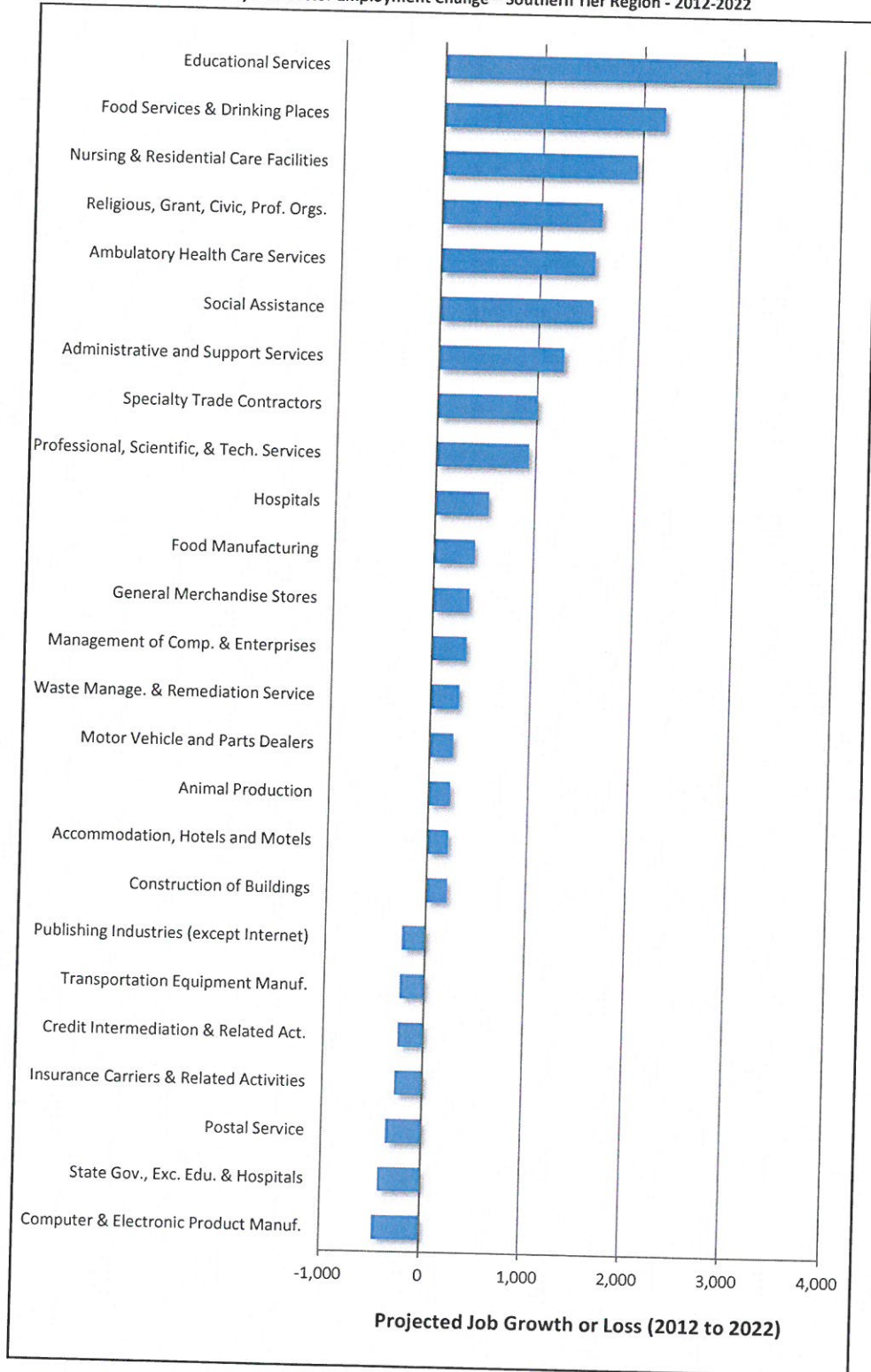
Chart 11: Projected Industry Sector Employment Change – 14830 ZIP Code - 2016-2026



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

Charts 12 and 13 depict the projected job changes in the Southern Tier Region and the 14830 ZIP code (respectively) for various sub-industries. These sub-industries help to narrow down the specific industries which may be appropriate for location within the Town of Corning.

Chart 12: Projected Industry Sub-Sector Employment Change – Southern Tier Region - 2012-2022



Source: New York State Department of Labor – Long Term Industry Projections

Chart 13: Projected Industry Sub-Sector Employment Change – 14830 ZIP Code - 2016-2026



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

TARGET INDUSTRIES

A location quotient (LQ) is a ratio that compares the local share of employment by industry to that of a larger base area's share of employment in that same industry. In other words, the location quotient can tell us what industries are prospering in a local area compared to national trends in that industry.

In this instance, Chart 14 is comparing the share of employment by industry sector in Steuben County with the share of employment by industry sector in the United States for the years 2005 and 2014. If the LQ is near 1.0, this indicates the share of employment in Steuben County is similar to that of the United States in that particular industry sector. A LQ greater than 1.0 indicates a greater share of employment in Steuben County compared to the United States, suggesting that particular industry sector is stronger locally. The following observations were made:

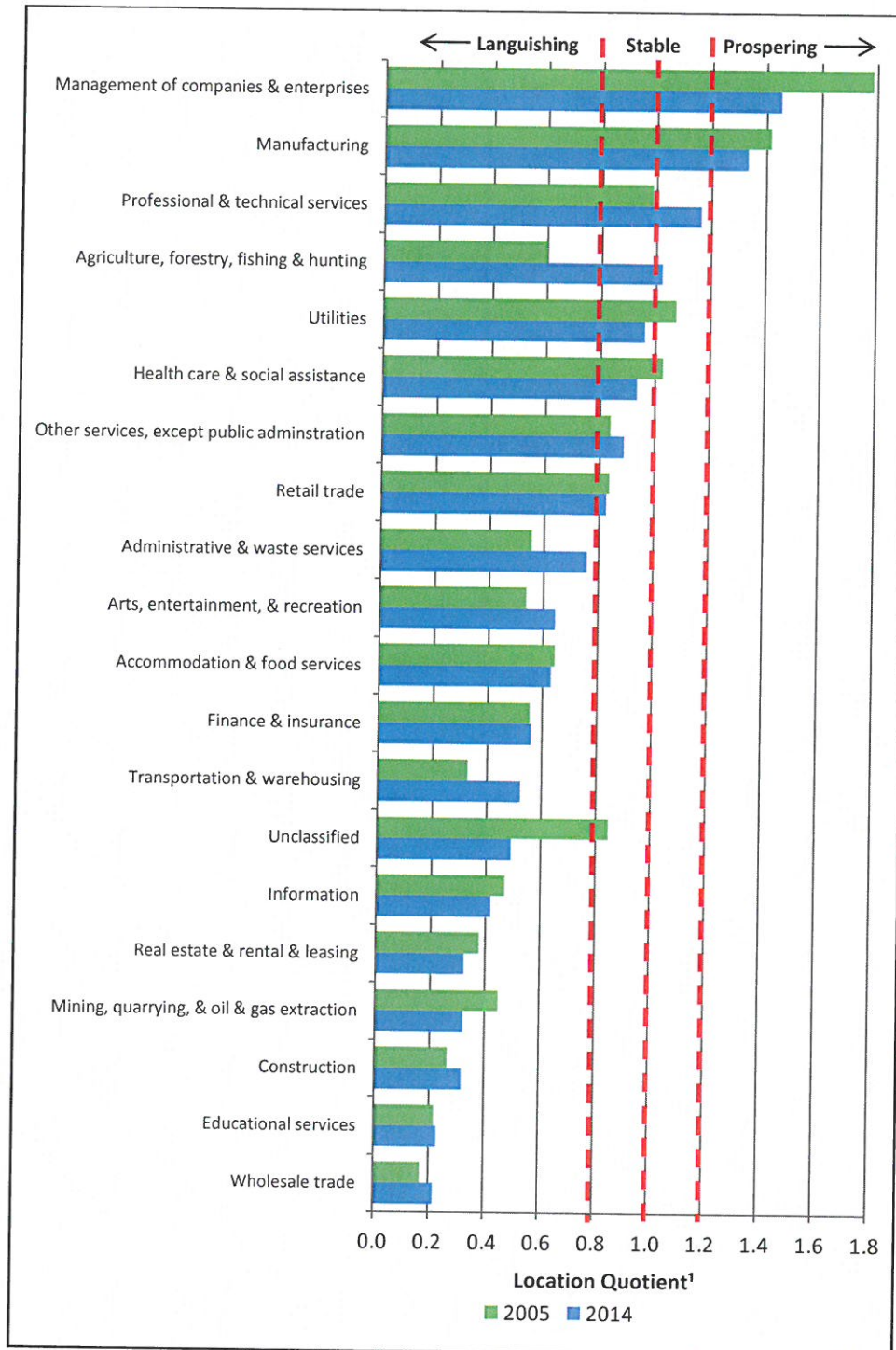
- In 2014, there were four industry sectors in Steuben County with greater employment share relative to the United States. Of these four industry sectors, two had significantly greater employment share relative to the United States (LQ greater than 1.2). These included management of companies and enterprises and manufacturing.
- In 2014, there were 16 industry sectors in Steuben County with less employment share relative to the United States. Of these 16 industry sectors, 12 had significantly lesser employment share relative to the United States (LQ less than 0.8). These included wholesale trade, educational services, and construction to name a few.
- The greatest LQ changes between 2005 and 2014 were experienced in agriculture/forestry/fishing/hunting (0.42 increase in LQ) and management of companies and enterprises (0.33 decrease in LQ).
- Charts 15 and 16 show select sub-sector industries that either have high or low shares of employment within Steuben County's market at a specific point in time (2014). This is measured by the previously described location quotient. Those sub-sector industries with high location quotients not only have high relative employment shares in Steuben County compared to the US overall, but they are likely exporting goods or services outside the market area and also have competitive advantages, or perform well, in that industry because they are in Steuben County. A low location quotient, on the other hand, is not necessarily a negative factor. Some sub-sector industries with

low location quotients may be emerging businesses with employment growth that do not have a large share of employment in the region yet.

As with previous sections of this report, similar location quotient analyses were performed for the 14830 ZIP code. While the micro analyses of the 14830 ZIP code provide pertinent data concerning the immediate local economy, the larger analyses (on the County and Regional scale) provide glimpses into a wider range of industries which may be performing well in the County or Region and could potentially expand into the Town. Chart 17 is comparing the share of employment by industry sector in the 14830 ZIP code with the share of employment by industry sector in the United States for the years 2006 and 2016. If the LQ is near 1.0, this indicates the share of employment in the 14830 ZIP code is similar to that of the United States in that particular industry sector. An LQ greater than 1.0 indicates a greater share of employment in the 14830 ZIP code compared to the United States, suggesting that particular industry sector is stronger locally. The following observations were made:

- In 2016, there were nine industry sectors in the 14830 ZIP code which had a greater employment share relative to the United States. Of these nine industry sectors, seven had significantly greater employment share relative to the United States (LQ greater than 1.2). These included management of companies and enterprises, agriculture, forestry, fishing and hunting, utilities, arts, entertainment, and recreation, and health care and social assistance.
- In 2016, there were 12 industry sectors in the 14830 ZIP code which had a lesser employment share relative to the United States. Of these 12 industry sectors, nine had significantly lesser employment share relative to the United States (LQ less than 0.8). These included mining, quarrying, and oil/gas extraction, wholesale trade, and transportation and warehousing to name a few.
- The greatest LQ changes between 2006 and 2016 were experienced in the agriculture/forestry/fishing/hunting (1.12 increase in LQ) and management of companies and enterprises (1.17 decrease in LQ).
- Charts 18 and 19 show select sub-sector industries that either have a high or low share of employment within the 14830 ZIP code's market at a specific point in time (2016). This is measured by the previously described location quotient.

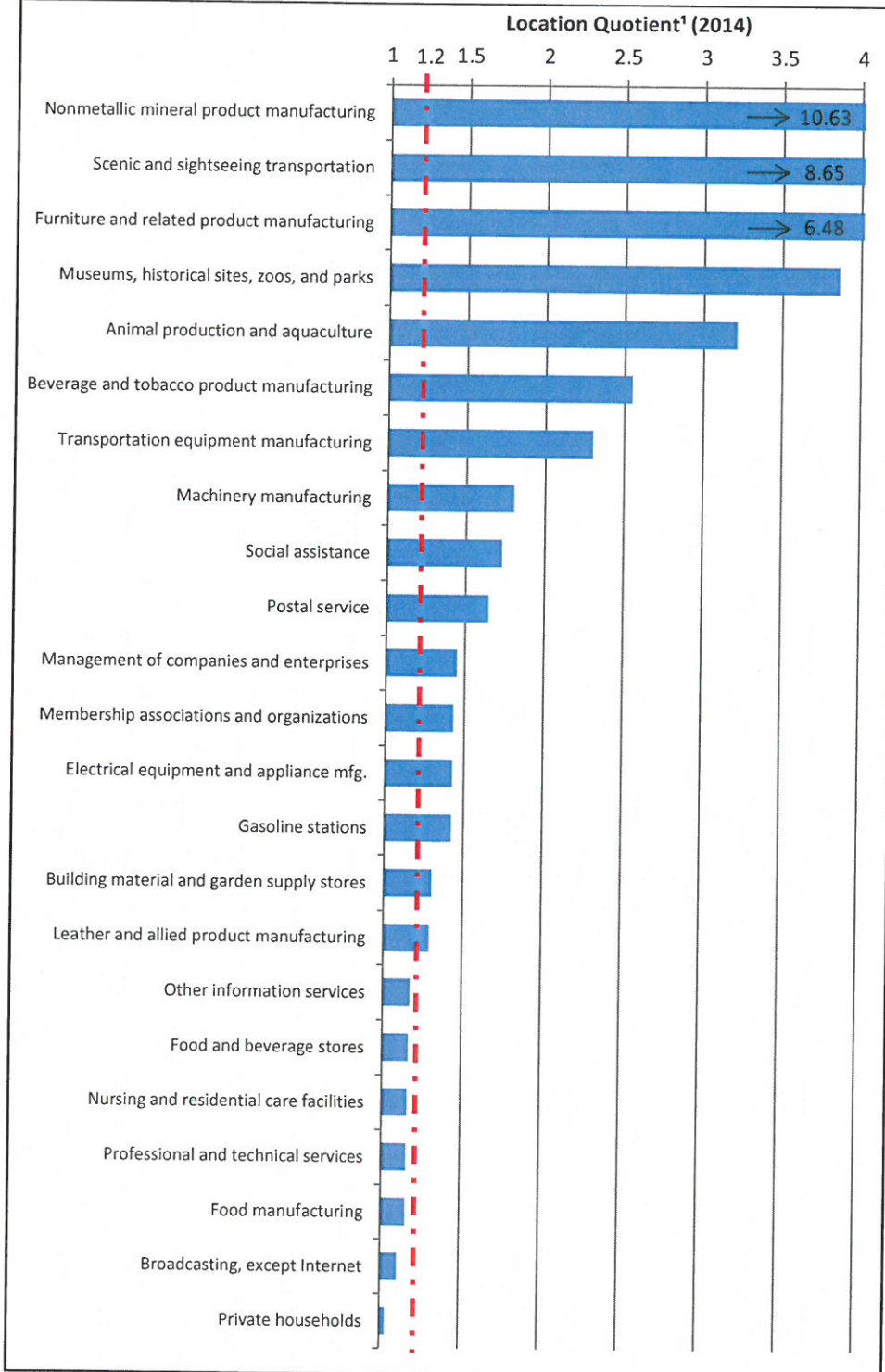
Chart 14: Location Quotient Share of Employment by Industry Sector – Steuben County relative to the United States - 2005-2014



Note: ¹ The Location Quotient (LQ) is a ratio comparing Steuben County's share of employment by industry sector with the United States share of employment by the same industry sector.

Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages

Chart 15: Industry Sub-Sectors with High Employment Share – Steuben County - 2014



Note: ¹ The Location Quotient (LQ) is a ratio comparing Steuben County's share of employment by industry sub-sector with the United States share of employment by the same industry sub-sector.

Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages

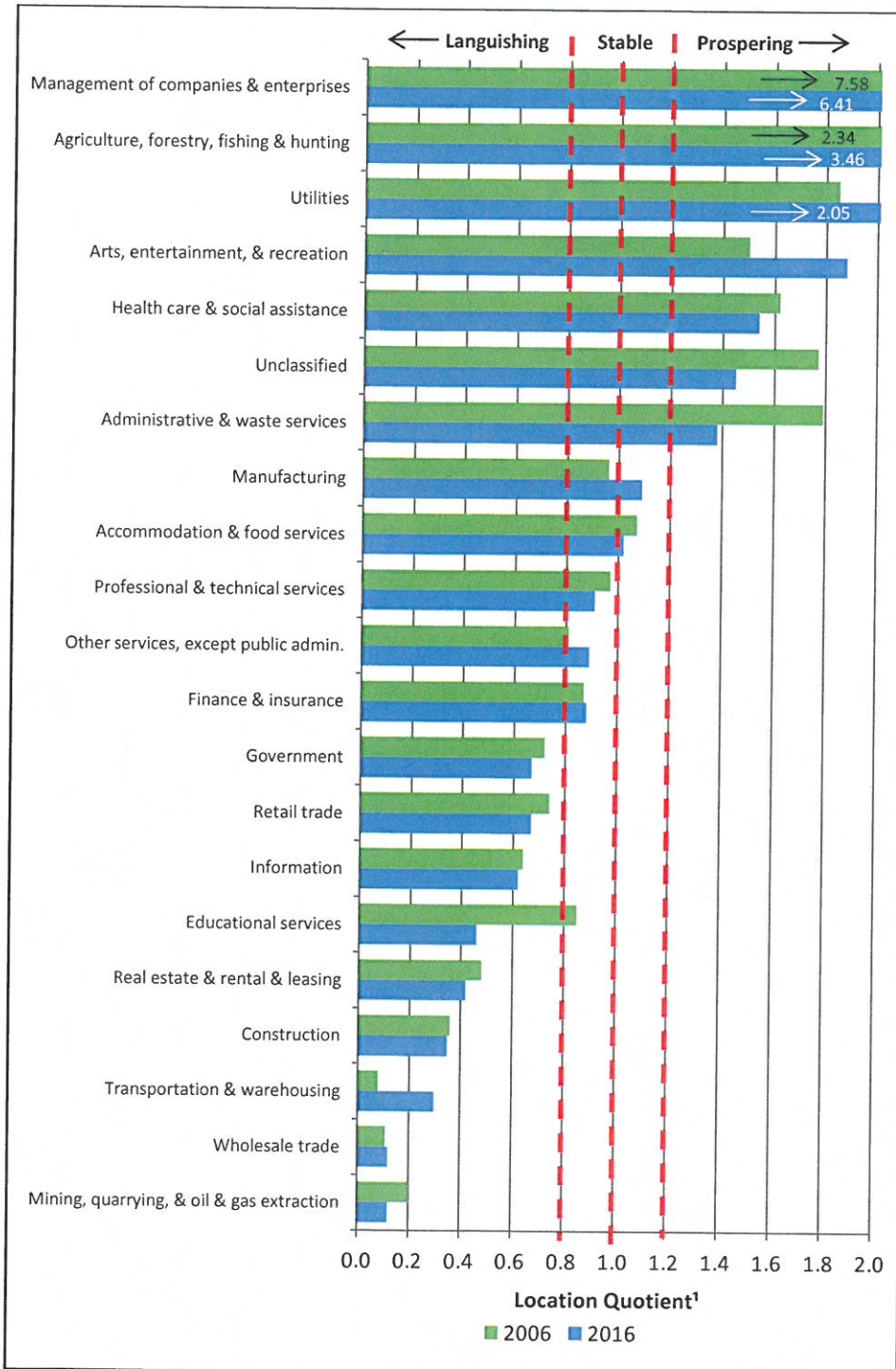
Chart 16: Industry Sub-Sectors with Low Employment Share – Steuben County - 2014



Note: ¹ The Location Quotient (LQ) is a ratio comparing Steuben County's share of employment by industry sub-sector with the United States share of employment by the same industry sub-sector.

Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages

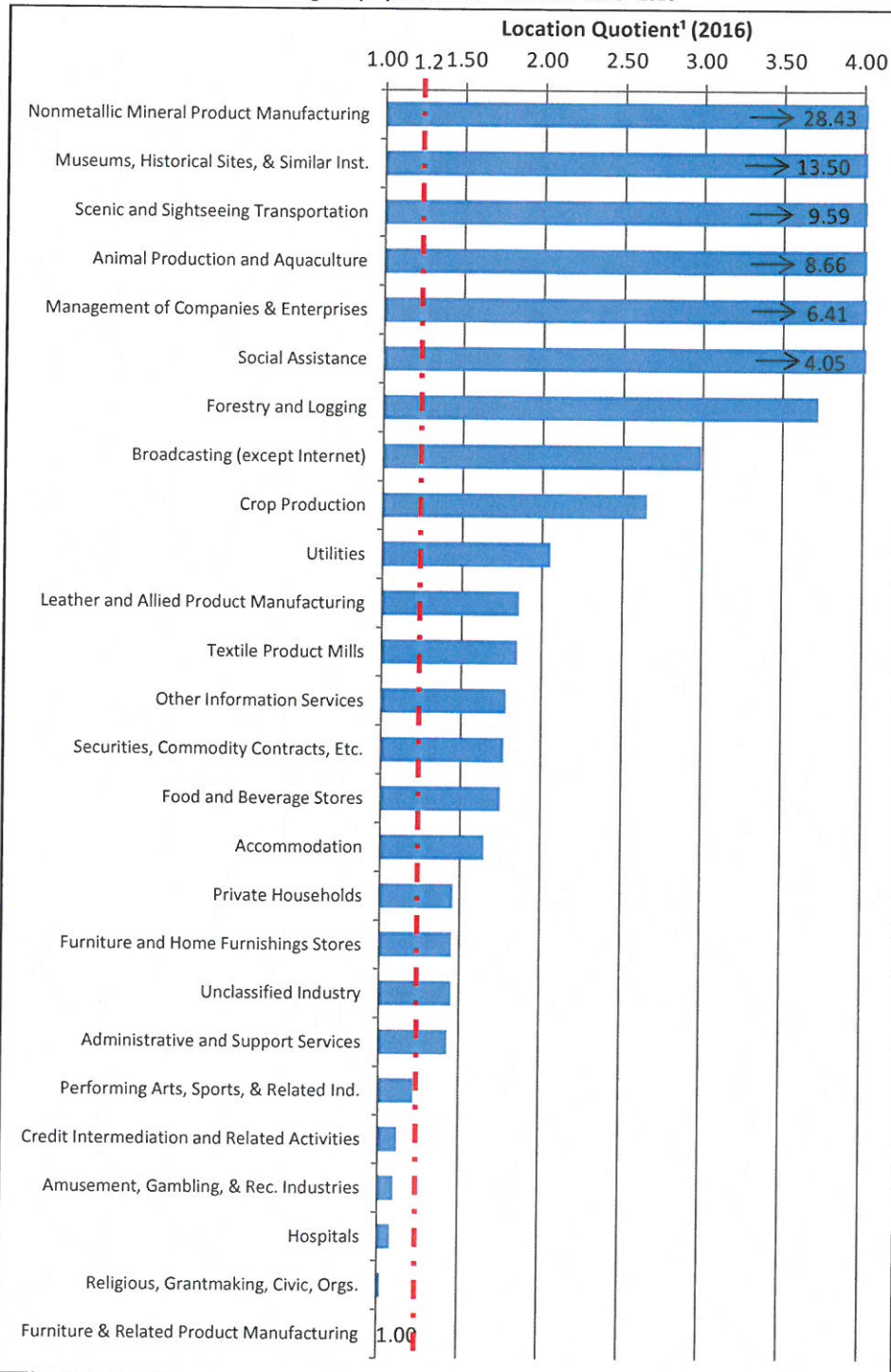
Chart 17: Location Quotient Share of Employment by Industry Sector – 14830 ZIP Code relative to the United States - 2006-2016



Note: ¹ The Location Quotient (LQ) is a ratio comparing the 14830 ZIP code's share of employment by industry sector with the United States share of employment by the same industry sector.

Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

Chart 18: Industry Sub-Sectors with High Employment Share – 14830 ZIP Code - 2016



Note: ¹ The Location Quotient (LQ) is a ratio comparing the 14830 ZIP code's share of employment by industry sub-sector with the United States share of employment by the same industry sub-sector.

Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

Chart 19: Industry Sub-Sectors with Low Employment Share – 14830 ZIP Code - 2016



Note: ¹The Location Quotient (LQ) is a ratio comparing the 14830 ZIP code's share of employment by industry sub-sector with the United States share of employment by the same industry sub-sector.

Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor

The Shift Share Tables in Appendix B measure select sub-sector industry employment strength in a different manner. Table 1 in Appendix B shows how much of the employment change in Steuben County over time (2005 to 2014) in a particular sub-sector industry is attributable to national, industry wide, and regional growth factors. For instance, some industries, such as construction of buildings, are usually related to or dependent on how well the national economy is doing. Other industries, such as specialty trade contractors, are growing because they have a regional competitive advantage in Steuben County likely because their skills align well with the specific construction needs of Steuben County industries. Table 2 in Appendix B shows how much of the employment change in the 14830 ZIP code over time (2006 to 2016) in a particular sub-sector industry is attributable to national, industry wide, and regional growth factors.

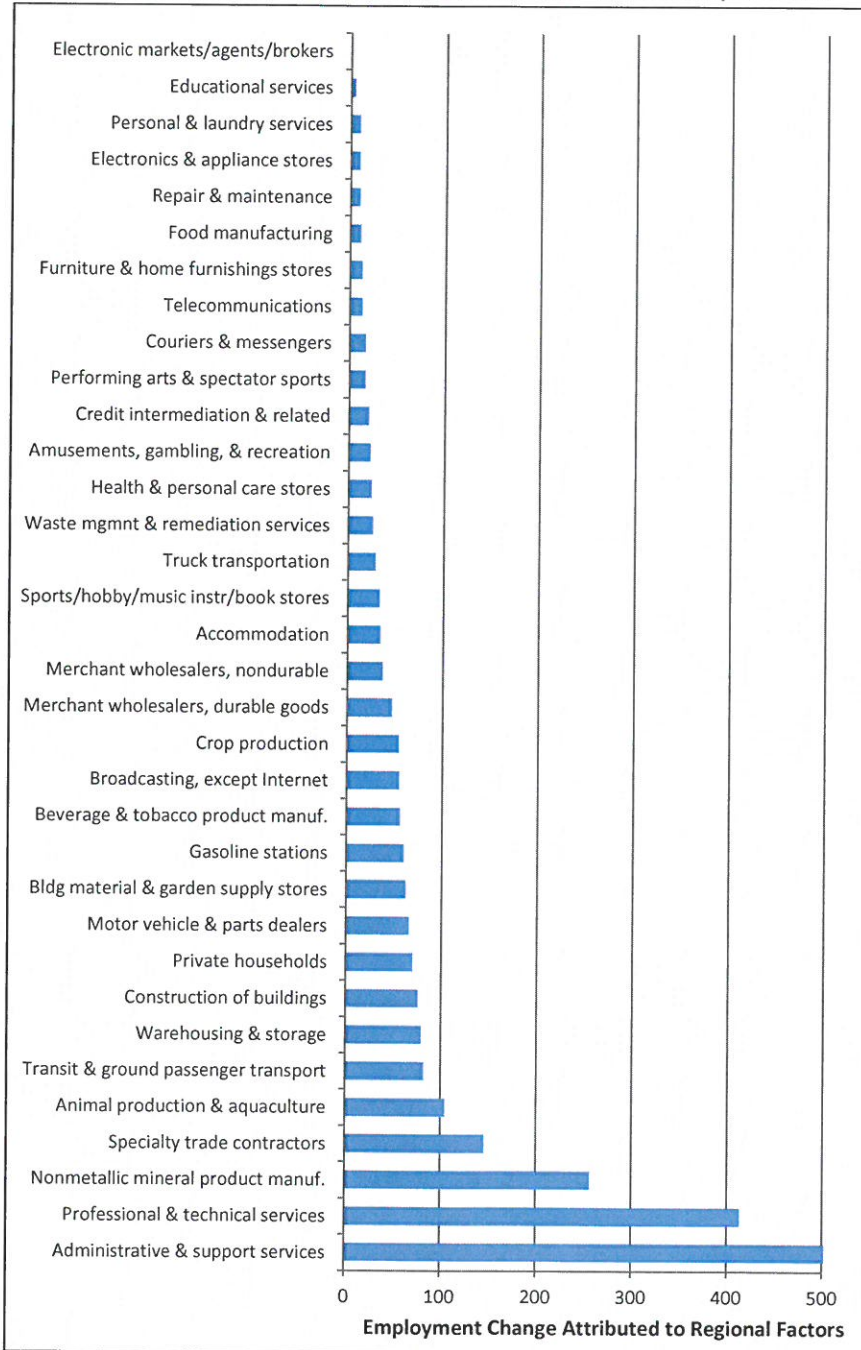
Utilizing information from Table 1 in Appendix B, Chart 20 displays those sub-sector industries within Steuben County that have a high regional employment growth rate (some may be losing employment overall, but that is due to national and/or industry-wide factors). Chart 21 shows the opposite – those industries that are not growing regionally. Utilizing information from Table 2 in Appendix B, Charts 22 and 23 display similar information for the 14830 ZIP code.

Combining the two factors together – current employment share and changes in regional employment share – a “menu” of potential industries to select for attraction, retention or expansion emerges as shown in Chart 24 and Table 7 (for Steuben County), Chart 25 and Table 8 (for the 14830 ZIP code), and divided into:

- *Current Strengths* – those industries that currently have a large employment share (relative to the U.S.) and also have strong regional growth over the last ten years.
- *Emerging Strengths* – those industries that currently have a relatively low employment share but have shown strong regional growth over time.
- *Retention Targets* – industries with a large employment share that are starting to lose their regional share of employment. Because of their significant employment base these industries should be targeted for retention.
- *Dependent Industries/Limited Prospects* – these industries do not have a large employment share in the market relative to the share of that industry in the U.S. and they are losing their regional share of employment. Industries in this category are mostly “dependent” industries – meaning that their growth or decline is dependent on the overall performance of the area’s

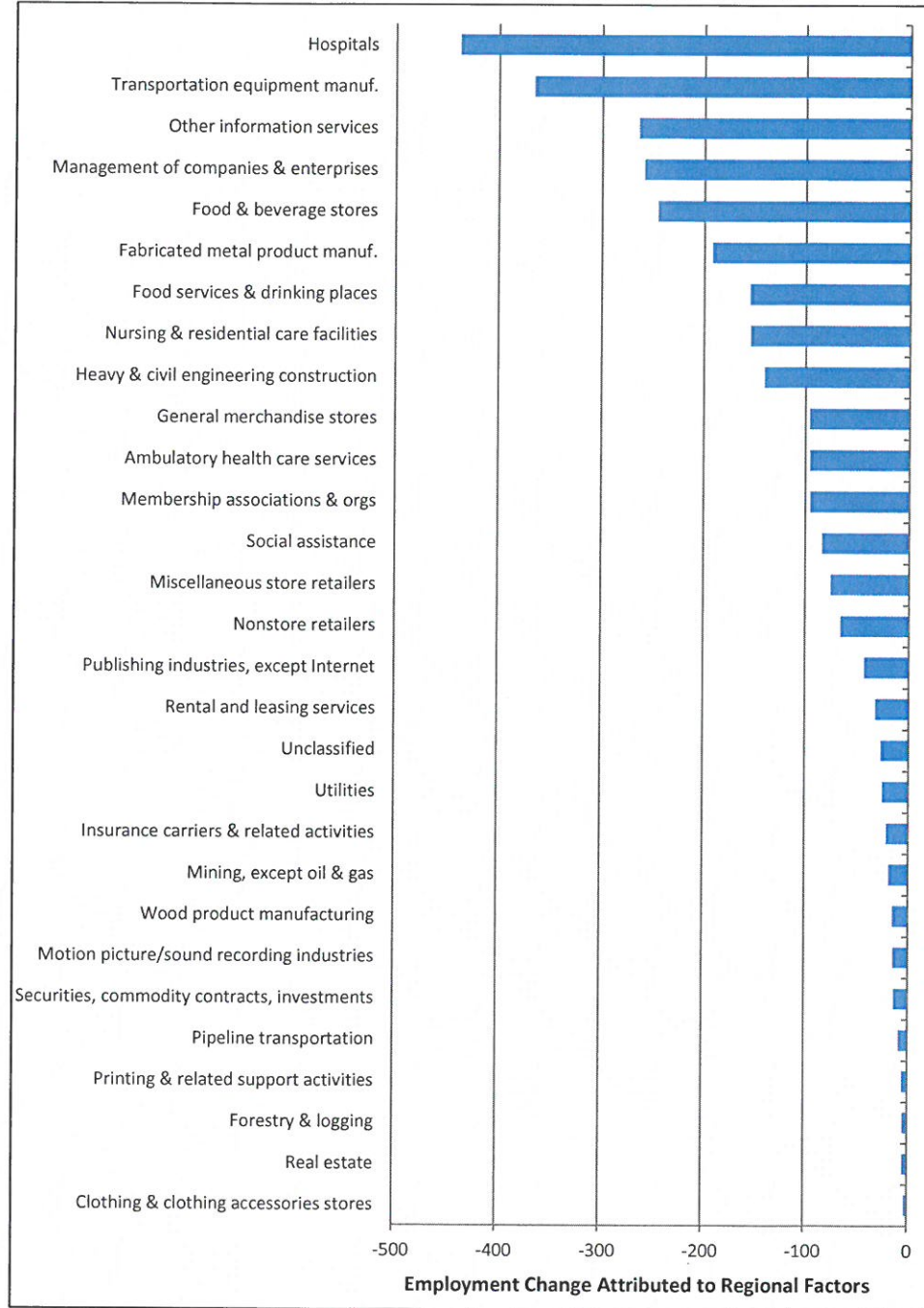
economy- while others are industries that would need (or already have) significant economic development incentives to succeed in Steuben County/the 14830 ZIP code.

Chart 20: Sub-Sector Industries Gaining Regional Employment Share – Steuben County - 2005-2014



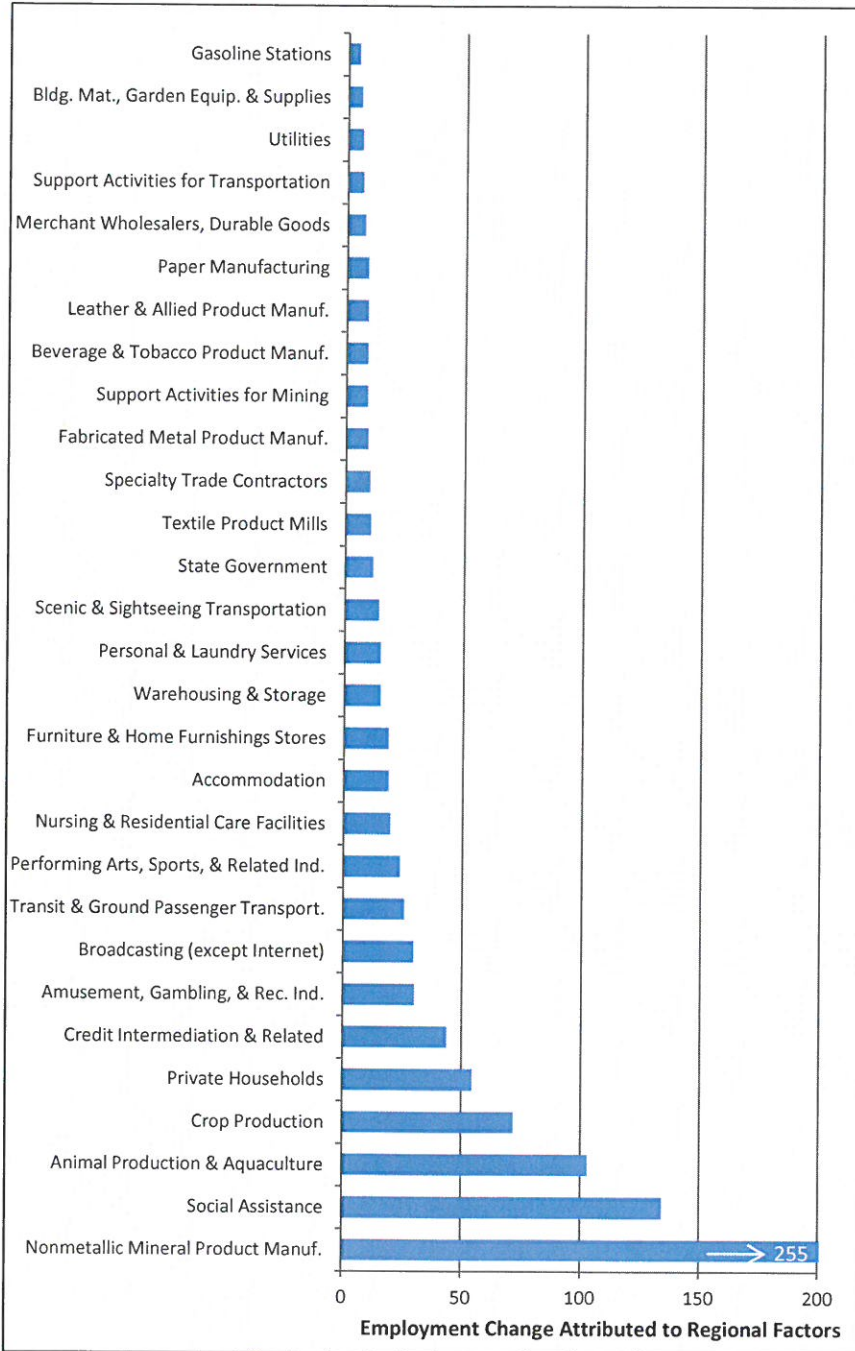
Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages; LaBella Associates, D.P.C.

Chart 21: Sub-Sector Industries Losing Regional Employment Share – Steuben County - 2005-2014



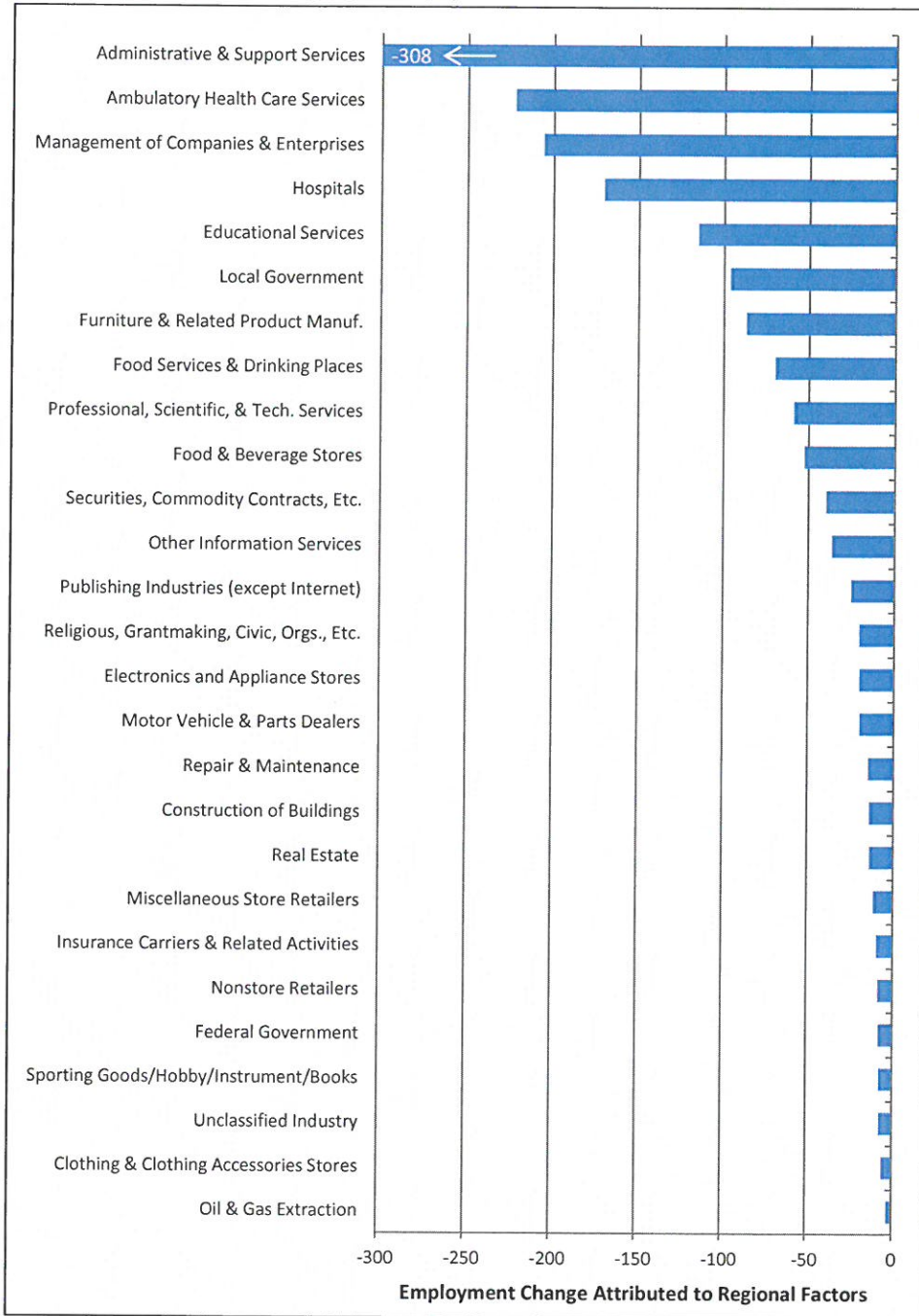
Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages; LaBella Associates, D.P.C.

Chart 22: Sub-Sector Industries Gaining Regional Employment Share – 14830 ZIP Code - 2006-2016



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor; LaBella Associates, D.P.C.

Chart 23: Sub-Sector Industries Losing Regional Employment Share – 14830 ZIP Code - 2006-2016



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor; LaBella Associates, D.P.C.

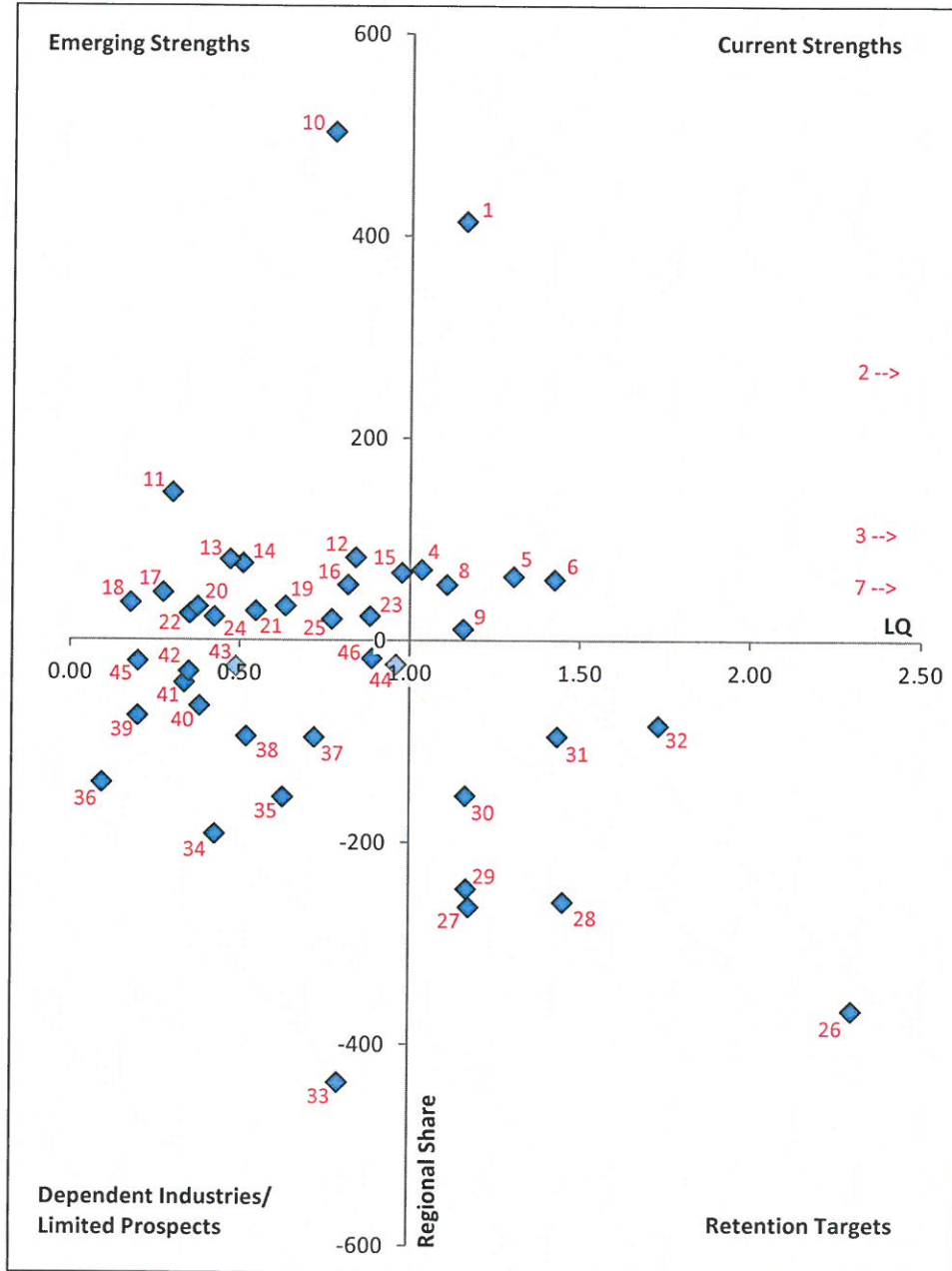
The list is a “menu” because economic development agencies can strategically choose which industries to focus on. As a reminder, the micro analyses of the 14830 ZIP code provides pertinent data concerning the immediate local economy. Due to the small area covered by the 14830 ZIP code, there are many industries which may not currently reside within the immediate area, but which may have a strong presence in Steuben County. The larger analyses of Steuben County provide glimpses into a wider range of industries which may be performing well in the County and could potentially expand into the Town.

Another factor to consider in selecting targeted industries for attraction and retention are number of jobs, total wages generated and the average wage of workers for Steuben County (Table 7) and the 14830 ZIP code (Table 8). Generally, economic development efforts should be focused on those industries that will create the greatest number of jobs and wealth in the economy.

Attracting professional and technical services is a perfect example of strategic economic development targeting with more than 3,000 jobs currently in Steuben County, expected increases of nearly 3,000 jobs throughout the Southern Tier Region by 2022 and an average wage of more than \$110,000 in Steuben County. Workers at these companies would be excellent residential prospects.

Niches with significant numbers of jobs such as food services and drinking places have a very low average wage but are important for tourism. In short, Tables 7 and 8 should be used as a guide for economic development targeting but careful consideration should be given to each industry and the potential direct and indirect benefits each provides to the local economy.

Chart 24: Industry Clusters – Steuben County - 2014



Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages; LaBella Associates, D.P.C. : Industry Clusters – 14830 ZIP Code – 2016

Table 7: Industry Clusters – Steuben County – 2014

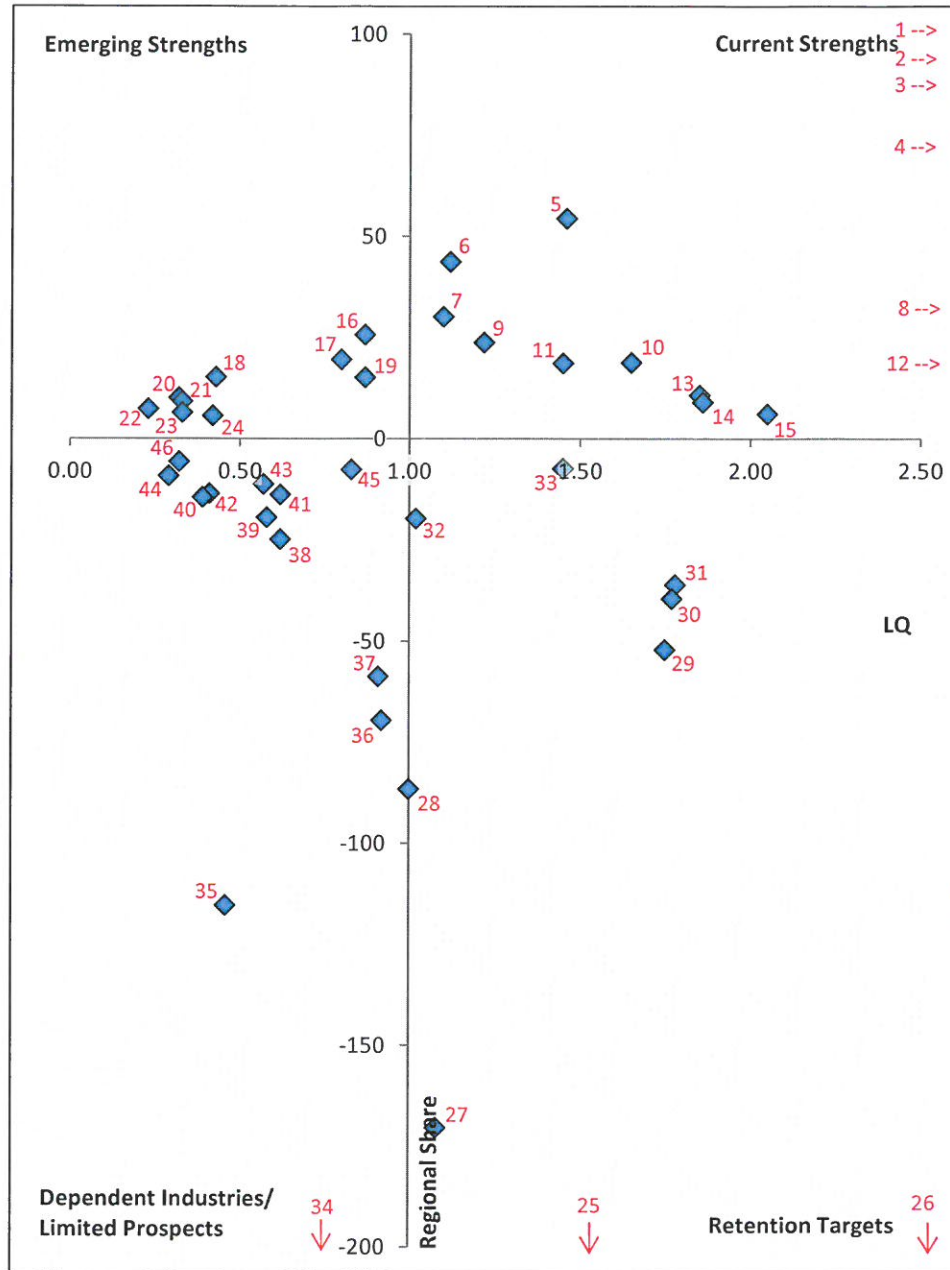
■ - Town of Corning inclined industries

ID	Sub-Sector Industry	2014		
		Employment	Total Wages ¹	Average Wage ¹
CURRENT STRENGTHS				
1	Professional & technical services	3,127	\$344,627,501	\$110,210
2	Nonmetallic mineral product manufacturing	1,308	\$91,660,812	\$70,077
3	Animal production & aquaculture	254	\$7,435,821	\$29,275
4	Private households	93	\$1,528,398	\$16,434
5	Building material and garden supply stores	514	\$13,673,140	\$26,601
6	Gasoline stations	404	\$6,866,331	\$16,996
7	Beverage and tobacco product manufacturing	173	\$5,433,183	\$31,406
8	Broadcasting, except Internet	101	\$3,533,061	\$34,981
9	Food manufacturing	554	\$26,126,261	\$47,159
EMERGING STRENGTHS				
10	Administrative and support services	2,045	\$103,099,747	\$50,416
11	Specialty trade contractors	376	\$14,706,302	\$39,113
12	Transit and ground passenger transportation	124	\$2,087,282	\$16,833
13	Warehousing and storage	113	\$3,659,518	\$32,385
14	Construction of buildings	222	\$6,735,717	\$30,341
15	Motor vehicle and parts dealers	585	\$25,080,118	\$42,872
16	Crop Production	147	\$3,763,436	\$25,602
17	Merchant wholesalers, durable goods	259	\$14,127,561	\$54,547
18	Merchant wholesalers, nondurable goods	116	\$4,173,870	\$35,982
19	Accommodation	386	\$7,413,132	\$19,205
20	Sports, hobby, music instrument, book stores	75	\$854,969	\$11,400
21	Truck transportation	249	\$12,635,127	\$50,743
22	Waste management and remediation services	44	\$1,712,081	\$38,911
23	Health and personal care stores	290	\$10,133,653	\$34,944
24	Amusements, gambling, and recreation	207	\$4,667,800	\$22,550
25	Credit intermediation and related activities	636	\$29,302,382	\$46,073
RETENTION TARGETS				
26	Transportation equipment manufacturing	1,158	\$81,752,673	\$70,598
27	Other information services	82	\$2,536,875	\$30,938
28	Management of companies and enterprises	1,009	\$210,270,593	\$208,395
29	Food and beverage stores	1,129	\$22,966,066	\$20,342
30	Nursing and residential care facilities	1,124	\$32,937,751	\$26,910
31	Membership associations and organizations	624	\$8,727,062	\$13,986
32	Social assistance	1,827	\$36,244,585	\$19,838
DEPENDENT INDUSTRIES / LIMITED PROSPECTS				
33	Hospitals	1,216	\$48,792,365	\$40,125
34	Fabricated metal product manufacturing	201	\$8,470,981	\$42,144
35	Food services and drinking places	2,159	\$31,850,398	\$14,752
36	Heavy and civil engineering construction	28	\$1,112,120	\$39,719
37	General merchandise stores	728	\$16,228,832	\$22,292
38	Ambulatory health care services	1,115	\$63,216,333	\$56,696
39	Miscellaneous store retailers	17	\$476,150	\$28,009
40	Nonstore retailers	61	\$2,225,372	\$36,482
41	Publishing industries, except Internet	79	\$2,622,793	\$33,200
42	Rental and leasing services	60	\$2,085,630	\$34,761
43	Unclassified	34	\$906,744	\$26,669
44	Utilities	170	\$14,294,449	\$84,085
45	Insurance carriers and related activities	141	\$5,768,566	\$40,912
46	Mining, except oil and gas	59	\$2,718,715	\$46,080

Note: ¹ Total Wages and Average Wages are preliminary as noted by the NYS Department of Labor.

Source: US Bureau of Labor Statistics and NYS Department of Labor – Quarterly Census of Employment and Wages

Chart 25: Industry Clusters – 14830 ZIP Code - 2016



Source: Economic Modeling Specialist International (EMSI) – New York State Department of Labor; LaBella Associates, D.P.C.

Table 8: Industry Clusters – 14830 ZIP Code – 2016

■ - Town of Corning inclined industries

ID	Sub-Sector Industry	2016		
		Employment	Total Wages ¹	Average Wage
CURRENT STRENGTHS				
1	Nonmetallic Mineral Product Manufacturing	856	\$76,969,808	\$89,918
2	Social Assistance	1,217	\$27,812,101	\$22,853
3	Animal Production & Aquaculture	274	\$9,230,786	\$33,689
4	Crop Production	163	\$4,701,409	\$28,843
5	Private Households	95	\$1,251,625	\$13,175
6	Credit Intermediation & Related Activities	213	\$11,852,385	\$55,645
7	Amusement, Gambling, & Rec. Industries	135	\$3,775,950	\$27,970
8	Broadcasting (except Internet)	62	\$2,942,396	\$47,458
9	Performing Arts, Sports, & Related Ind.	73	\$3,704,385	\$50,745
10	Accommodation	235	\$5,627,780	\$23,948
11	Furniture & Home Furnishings Stores	52	\$2,380,612	\$45,781
12	Scenic & Sightseeing Transportation	25	\$1,087,150	\$43,486
13	Textile Product Mills	17	\$1,201,560	\$70,680
14	Leather & Allied Product Manufacturing	< 10	Insuffic. Data	Insuffic. Data
15	Utilities	83	\$11,680,839	\$140,733
EMERGING STRENGTHS				
16	Transit & Ground Passenger Transportation	37	\$775,298	\$20,954
17	Nursing & Residential Care Facilities	194	\$6,800,670	\$35,055
18	Warehousing & Storage	28	\$884,688	\$31,596
19	Personal & Laundry Services	133	\$2,946,083	\$22,151
20	Specialty Trade Contractors	127	\$4,640,453	\$36,539
21	Fabricated Metal Product Manufacturing	34	\$1,786,972	\$52,558
22	Merchant Wholesalers, Durable Goods	49	\$5,561,108	\$113,492
23	Support Activities for Transportation	17	\$942,956	\$55,468
24	Bldg. Material, Garden Equip. & Supplies	39	\$1,337,037	\$34,283
RETENTION TARGETS				
25	Administrative & Support Services	982	\$45,282,966	\$46,113
26	Management of Companies & Enterprises	1,035	\$252,355,770	\$243,822
27	Hospitals	385	\$19,051,725	\$49,485
28	Furniture & Related Product Manufacturing	30	\$1,317,750	\$43,925
29	Food & Beverage Stores	400	\$10,810,000	\$27,025
30	Securities, Commodity Contracts, Etc.	128	\$14,310,784	\$111,803
31	Other Information Services	34	\$1,255,620	\$36,930
32	Religious, Grantmaking, Civic, Orgs., Etc.	217	\$4,141,228	\$19,084
33	Unclassified Industry	30	\$1,010,640	\$33,688
DEPENDENT INDUSTRIES / LIMITED PROSPECTS				
34	Ambulatory Health Care Services	411	\$29,050,713	\$70,683
35	Educational Services	137	\$4,419,346	\$32,258
36	Food Services & Drinking Places	765	\$14,299,380	\$18,692
37	Professional, Scientific, & Tech. Services	665	\$75,551,315	\$113,611
38	Publishing Industries (except Internet)	35	\$1,441,790	\$41,194
39	Motor Vehicle & Parts Dealers	85	\$2,949,755	\$34,703
40	Repair & Maintenance	48	\$1,573,920	\$32,790
41	Construction of Buildings	89	\$2,843,995	\$31,955
42	Real Estate	59	\$2,341,710	\$39,690
43	Miscellaneous Store Retailers	40	\$885,800	\$22,145
44	Insurance Carriers & Related Activities	52	\$2,704,052	\$52,001
45	Sporting Goods, Hobby, Instrument, & Books	41	\$688,800	\$16,800
46	Clothing & Clothing Accessories Stores	33	\$625,878	\$18,966

Note: ¹ Total Wages were calculated by multiplying Employment by Average Wage by each industry sub-sector.

Source: Economic Modeling Specialist International (EMSI) – NYS Department of Labor; LaBella Associates, D.P.C.

ECONOMIC AND REAL ESTATE ANALYSIS

The employment projections by industry sector for the Southern Tier Region were extrapolated to determine potential annual demand estimates for additional building space by type of use until 2022 (Table 9). The following observations were made:

- The annual gross demand in the Southern Tier Region is estimated to be nearly 500,000 square feet (SF) across all sectors.
- The greatest annual gross demand is for institutional space in the health care and social assistance sector. Considering Chart 12, the specific types of health care and social assistance industries that are projected to have large employment increases within the Southern Tier Region (i.e. nursing and residential care, ambulatory health care and social assistance) could grow outward from the recent hospital development.
- The second greatest annual gross demand is for institutional space in the educational services sector followed closely by the demand for office/flex space in the professional and business services sector. The educational services sub-sector has the largest projected increase in employment.
- The accommodations and food services sector has the fourth largest gross annual demand for additional space, while the food services and drinking places industry sub-sector has the second largest projected increase in employment.

At a more localized scale, the employment projections by industry sector for the 14830 ZIP code were extrapolated to determine potential annual demand estimates for additional building space by type of use until 2026 (Table 10). The following observations were made:

- The annual gross demand in the 14830 ZIP code is estimated to be slightly more than 1,000 square feet (SF) across all sectors.
- The greatest annual gross demand is for institutional space in the health care and social assistance sector. Considering Chart 13, the specific types of health care and social assistance industries that are projected to have large employment increases (i.e. social assistance, nursing and residential care, and ambulatory health care) could grow outward from the recent hospital development.
- The second greatest annual gross demand is for office/flex space in the professional, scientific, and technical services sector followed closely by the

demand for office/flex space in the Other Services and Finance and Insurance sectors.

- The accommodations and food services sector has the seventh largest gross annual demand for additional space, the projected employment in the food services and drinking places industry sub-sector growing faster than that of the accommodation industry sub-sector.

Two important considerations concerning the gross annual demands include:

1. Realistically, not all of the projected growth in employment would result in demand for new or additional space, as some demand could be met by existing vacancies
2. The projected gross annual demand for additional building space is for the entire Southern Tier Region or the entire 14830 ZIP code depending on which table is being consulted. The Town of Corning would only be able to expect a portion of any additional space developed in the Southern Tier Region / 14830 ZIP code on a somewhat proportional basis. However, it could potentially attract an industry or employer that would have a catalytic impact on the local economy and absorb the regional demand, much as the Dick's Sporting Goods distribution facility has done. This will require the appropriate infrastructure is in place to achieve this goal.

Table 9: Projected Gross Annual Demand (square feet - SF) by Industry – Southern Tier Region - 2012-2022

Industry	Average SF per Employee	Employment			Southern Tier Gross Annual Demand (SF)
		2012	2022	Change	
Government	300	28,790	27,760	-1,030	-30,900
Manufacturing	1,000	35,630	35,030	-600	-60,000
Information	300	3,800	3,480	-320	-9,600
Finance & Insurance	250	10,130	9,920	-210	-5,250
Wholesale Trade	750	7,580	7,800	220	16,500
Arts, Entertainment, & Recreation	500	2,810	3,080	270	13,500
Retail Trade	300	31,350	31,730	380	11,400
Transportation & Warehousing	500	5,750	6,230	480	24,000
Construction	500	8,570	9,740	1,170	58,500
Other Services	300	12,260	14,120	1,860	55,800
Accommodation & Food Services	300	20,340	22,770	2,430	72,900
Professional & Business Services	300	22,300	25,130	2,830	84,900
Educational Services	300	55,770	59,100	3,330	99,900
Health Care & Social Assistance	300	39,390	44,970	5,580	167,400
Total:					499,050

Source: New York State Department of Labor – Long Term Industry Projections; ITE; LaBella Associates, D.P.C.

Table 10: Projected Gross Annual Demand (square feet - SF) by Industry – 14830 ZIP Code - 2016-2026

Industry	Average SF per Employee	Employment			14830 Annual Demand (SF)
		2016	2026	Change	
Manufacturing	500	993	825	-168	-8,400
Admin. & Waste Management	300	992	875	-117	-3,510
Management of Companies	300	1,035	994	-41	-1,230
Government	300	1,187	1,151	-36	-1,080
Information	300	133	112	-21	-630
Retail Trade	300	802	782	-20	-600
Real Estate, Rental, & Leasing	250	80	63	-17	-425
Construction	500	217	201	-16	-800
Educational Services	300	137	145	8	240
Wholesale Trade	750	54	73	19	1,425
Transportation & Warehousing	500	116	142	26	1,300
Arts, Entertainment, & Recreation	500	367	405	38	1,900
Accommodation & Food Services	300	1,000	1,047	47	1,410
Finance & Insurance	250	393	456	63	1,575
Other Services	300	492	567	75	2,250
Professional, Scientific, Tech Services	300	665	745	80	2,400
Health Care & Social Assistance	300	2,207	2,381	174	5,220
Total:					1,045

Source: Economic Modeling Specialist International (EMSI) – NYS Department of Labor; ITE; LaBella Associates, D.P.C.

LaBella reviewed this data, and the realities of the Southern Tier Region and 14830 ZIP code markets, to develop an economic and real estate market analysis for each market sector.

OFFICE MARKET

Office is the strongest market sector in the Southern Tier Region and the 14830 ZIP code. Based on an analysis of the growth/decline in employment of office inclined industries (administration, government, management of companies, information, real estate, educational services, finance/insurance, other services, professional, scientific, tech services, and health care) over the next decade, LaBella estimates there is demand for nearly 340,000 square feet annually in the office market for all of the Southern Tier Region and more than 4,800 square feet annually in the office market for all of the 14830 ZIP code. Translated over 10 years, there is a demand for approximately 3.4 million square feet of space within the Southern Tier Region and 48,000 square feet of space in the 14830 ZIP code.

Currently the 14830 ZIP code is home to approximately five percent of the Southern Tier Region's jobs in office-inclined industries. And it should be noted that Corning Incorporated's Sullivan Park Campus as well as Dresser-Rand (both major office-inclined employers) are located outside of the 14830 ZIP code. While a large percentage of 14830 ZIP code office-inclined employers are likely located within the City of Corning, major office-inclined employers within the Town of Corning include Corning Community College, Corning Hospital, Calvin Smith Elementary School, and various small businesses located in office buildings along East Corning Road/LPGA Drive.

Based upon the demand analysis of the Southern Tier Region, the following conclusions are drawn: Because of the new hospital location and the Town's proximity to major thoroughfares, **LaBella estimates that the Town could conservatively capture up to one percent of the demand for office space over the next decade or 34,000 square feet.**

Based upon the demand analysis of the 14830 ZIP Code the following conclusions are drawn: Because of the new hospital location and the Town's proximity to major thoroughfares, **LaBella estimates that the Town could conservatively capture up to 25 percent of the demand for office space over the next decade or approximately 12,000 square feet.**

Because the ZIP code micro analysis is so focused, it fails to pick up on regional potentials. At the same time, the regional analysis has a large focus area relative to the Town of Corning and may reflect undue influence for growth from the Binghamton area, currently the focus of the Innovation District approach. **Therefore it is safe to assume that somewhere in between 34,000 square feet which does seem excessive, and 12,000 square feet, which seems very modest, is a good goal for office space development over the next decade.** Health care and social services related to the hospital on the eastern edge of the Town and the health care-related developments on the east side of Corning are target sectors. Similarly, potential developments adjacent to Corning Community College could be excellent prospects, if zoning restrictions in the area are lifted.

If new space is developed, it will likely be in a multiple-building development such as an office park where it can develop in phases, or in scattered sites throughout the Town. The Town should identify and actively market a site or sites that are shovel ready for this purpose.

INDUSTRIAL MARKET

In contrast to the office market, the market for new industrial space is weak in the Southern Tier Region and the 14830 ZIP code. Between 2000 and 2016 the Southern Tier Region lost nearly 19,000 manufacturing jobs and is projected to continue to lose jobs. In fact, the actual 2016 manufacturing employment numbers are already less than what the State projected manufacturing employment would be in 2022. Furthermore, between 2001 and 2016 the 14830 ZIP code lost more than 850 manufacturing jobs and is projected to lose an additional 167 manufacturing jobs over the next decade.

However, there are still nearly 1,000 manufacturing jobs in the 14830 ZIP code today, more than 5,000 manufacturing jobs in Steuben County and more than 33,000 in the Southern Tier Region. Therefore, the Town could potentially attract the industrial sectors that are anticipated to expand over the next 10 years. Manufacturing or industrial related subsectors that are anticipated to expand over the next decade within the Southern Tier Region include specialty trade contractors (construction building trades), food manufacturing, and waste management and remediation services. Manufacturing or industrial related subsectors that are anticipated to expand over the next decade within the 14830 ZIP code include fabricated metal product manufacturing, warehousing and storage, miscellaneous manufacturing, and textile product mills.

The Town of Corning is already home to several gravel pits and storage unit businesses. Based on an analysis of the growth in employment of those and the previously mentioned industries over the next decade, LaBella estimates there is demand for 1,000 square feet annually in the industrial real estate market or 10,000 square feet over the next 10 years for all of the 14830 ZIP code. **LaBella therefore, estimates that the Town of Corning could capture up to 15 percent of the 10-year growth or 1,500 square feet of industrial and/or warehouse/distribution space over the next 10 years.**

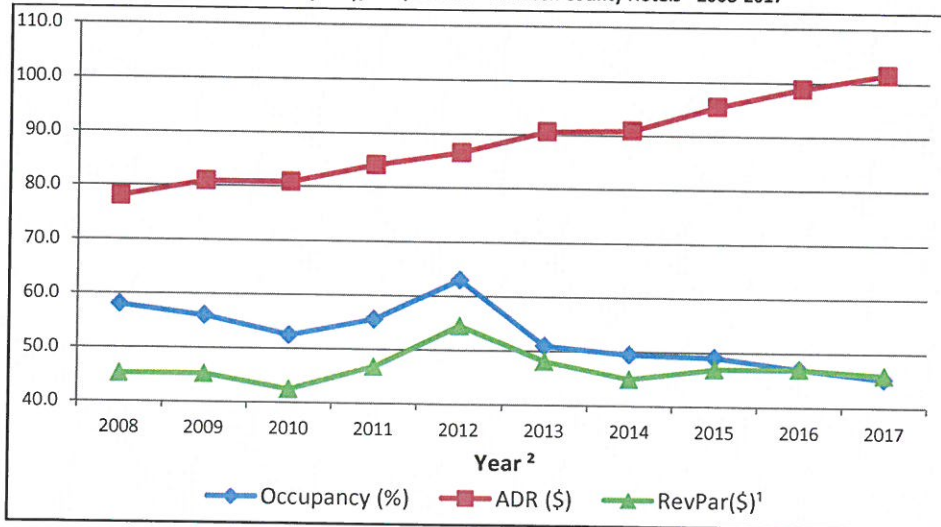
This is a very low projection, probably below the threshold of new construction. The potential for attracting a new manufacturing concern is a regional effort that, if successful, will likely require significant land for development or redevelopment. Rather than go it alone, the Town of Corning should actively participate in site selection discussions with local and regional economic development officials to market its unique sites for manufacturing.

HOSPITALITY MARKET

As of June 2017, there are 27 hotels in Steuben County offering 1,634 rooms. This is an increase as compared to June 2009 when Steuben County had 26 hotels offering 1,536 rooms. Within the Town of Corning (excluding the Villages of Riverside and South Corning), there are two hotels offering 57 rooms in total. The Budget Inn Corning is a 2-star hotel located on LPGA Drive with 37 rooms. The Gatehouse Motel is a family-run motel located on LPGA Drive with 20 rooms. A wide range of hotels and bed and breakfasts are located nearby in the City of Corning, Villages of Riverside, Gang Mills, and Painted Post, and Towns of Big Flats and Horseheads.

Since 2008, the average daily rate for accommodations in Steuben County has increased from \$78.86 to \$101.72 while the occupancy rate has decreased from 59.5% to 44.5% (Chart 26). The amount of revenue generated by each room sold has increased by \$22.86 since 2008 not considering inflation. When considering inflation, the amount of revenue generated by each room sold has actually only increased by \$13.44 since 2008. The bottom line is that while the rate has increased somewhat, the occupancy level has decreased.

Chart 26: Comparison of Hotel Occupancy/ADR/RevPar – Steuben County Hotels - 2008-2017



Note: ¹ RevPar(\$)¹ also known as the Revenue per Available Room is the room revenue divided by rooms available.

² Each year is a "running 12 month" average from May of the previous year to April (i.e. 2008 is the running 12 month average calculated using data from May 2007 to April 2008)

Source: Smith Travel Research, Market – Steuben County.

Typically, the market must achieve a 60 percent occupancy rate before more rooms are needed. **Therefore, at this point in time, additional hotels are not justified** realizing that the occupancy rate has been decreasing since 2012 and is currently

well below 60 percent. The Town may want to work with regional economic developers to identify specific needs for office and accommodations near the new Corning Hospital so the two developments could support one another. If this avenue is chosen, it is imperative that a flag hotel of a known brand with a national reputation is recruited to operate the hotel.

RETAIL MARKET

The estimated consumer demand for various retail goods and services in 2017 will be approximately \$112.6 million by Town of Corning residents inclusive of the Village of Riverside and Village of South Corning (Table 10). The estimated retail sales in 2017 will be \$77.7 million in the Town, showing a net leakage of nearly \$35 million out of the Town of Corning.

The Leakage/Surplus Index is calculated by dividing sales by demand. An index greater than 1.0 (surplus) indicates that businesses within the Town of Corning are selling more of that particular merchandise than what is demanded by Town residents and businesses. This suggests that businesses within the Town are attracting outsiders to spend money within the Town. Alternatively, an index less than 1.0 (leakage) indicates that the demand of Town residents and businesses are not being met by businesses within the Town and they are therefore shopping outside of the Town for those particular types of goods.

As depicted in Table 11, most merchandise lines are experiencing leakage. **If the Town could recapture just fifteen percent of the leakage, then it is estimated that nearly 21,000 square feet of new retail space would be warranted over the next decade.** Chart 27 reveals there are many merchandise lines that are non-existent within the Town of Corning (all line items with a leakage/surplus index of zero). New retail businesses offering these merchandise types could potentially perform well within the Town. However, starting new businesses is often riskier than expanding existing businesses. Chart 27 reveals the largest leakage in existing businesses (and therefore largest unmet demand) is in hobby, toys, and game stores, electronic stores, general merchandise stores, and automotive dealers.

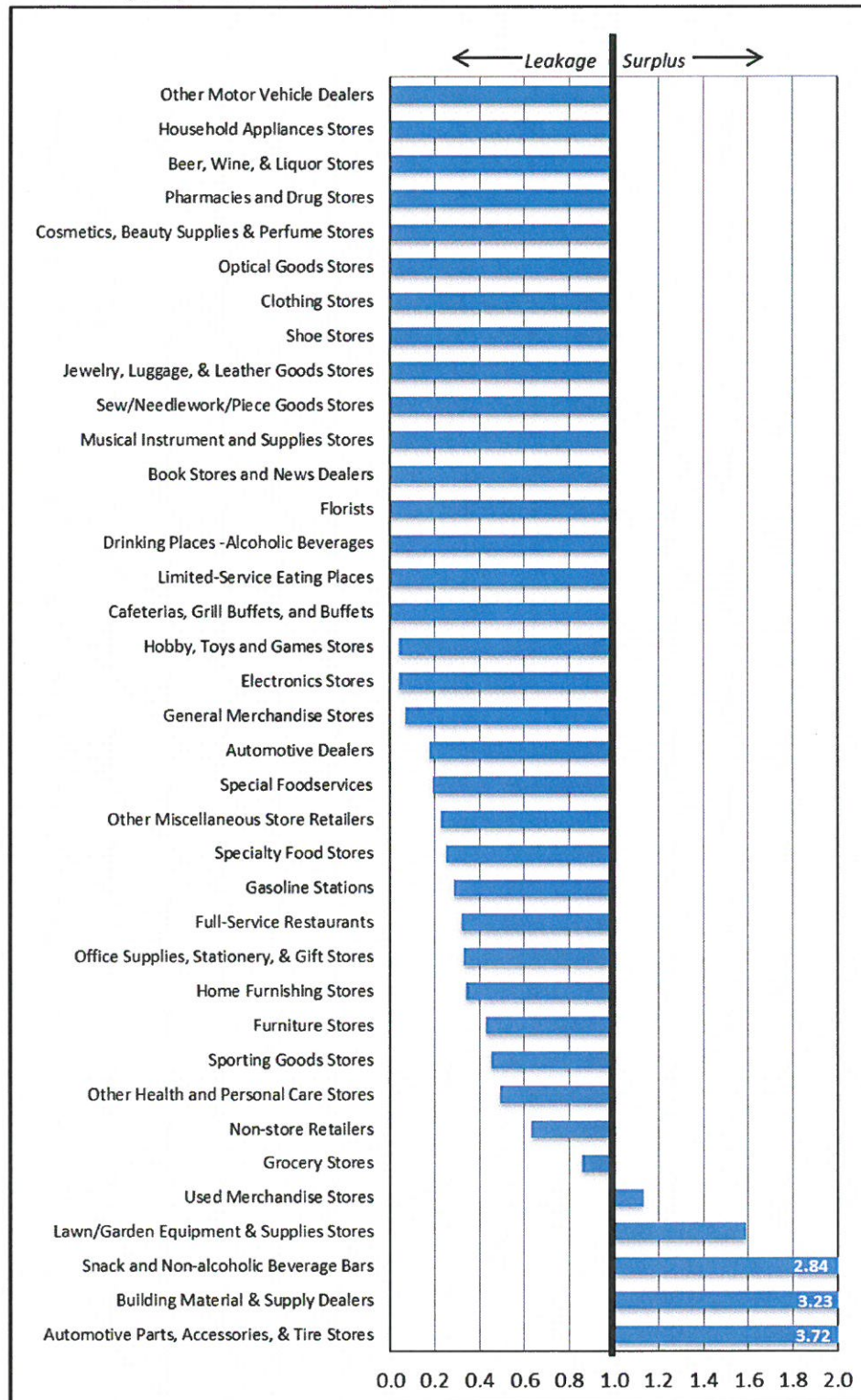
However, the Town of Corning has traditionally been a bedroom community and not a retail center. Any new or expanded retail opportunities will compete with businesses located within the City of Corning, businesses along South Hamilton Street in Gang Mills, and businesses within the ever expanding Consumer Square/Southern Tier Crossing/Arnot Mall area.

Table 11: Retail Demand and Sales – Town of Corning- 2017

Merchandise Lines	Demand (\$)	Supply (\$)	Opportunity Gap/Surplus (\$)	Leakage/Surplus Index	Estimated Supportable New SF of Retail through Recapture		
					5%	15%	25%
Automotive Dealers	20,090,515	3,552,960	(16,537,555)	0.18	3,308	9,923	16,538
Other Motor Vehicle Dealers	1,638,209	0	(1,638,209)	0.00	328	983	1,638
Automotive Parts, Accessories, & Tire Stores	1,907,435	7,089,374	5,181,939	3.72	(1,036)	(3,109)	(5,182)
Furniture Stores	1,226,727	525,452	(701,275)	0.43	140	421	701
Home Furnishing Stores	1,069,740	363,733	(706,007)	0.34	141	424	706
Household Appliances Stores	285,547	0	(285,547)	0.00	57	171	286
Electronics Stores	1,524,579	61,606	(1,462,973)	0.04	293	878	1,463
Building Material & Supply Dealers	11,948,216	38,579,822	26,631,606	3.23	(5,326)	(15,979)	(26,632)
Lawn/Garden Equipment & Supplies Stores	1,006,233	1,600,373	594,140	1.59	(119)	(356)	(594)
Grocery Stores	13,083,214	11,225,056	(1,858,158)	0.86	372	1,115	1,858
Specialty Food Stores	483,914	122,084	(361,830)	0.25	72	217	362
Beer, Wine, & Liquor Stores	793,631	0	(793,631)	0.00	159	476	794
Pharmacies and Drug Stores	5,210,628	0	(5,210,628)	0.00	1,042	3,126	5,211
Cosmetics, Beauty Supplies & Perfume Stores	524,427	0	(524,427)	0.00	105	315	524
Optical Goods Stores	241,506	0	(241,506)	0.00	48	145	242
Other Health and Personal Care Stores	389,457	190,804	(198,653)	0.49	40	119	199
Gasoline Stations	6,917,999	1,977,941	(4,940,058)	0.29	988	2,964	4,940
Clothing Stores	3,660,694	0	(3,660,694)	0.00	732	2,196	3,661
Shoe Stores	658,813	0	(658,813)	0.00	132	395	659
Jewelry, Luggage, & Leather Goods Stores	594,466	0	(594,466)	0.00	119	357	594
Sporting Goods Stores	1,255,346	568,141	(687,205)	0.45	137	412	687
Hobby, Toys and Games Stores	379,107	15,292	(363,815)	0.04	73	218	364
Sew/Needlework/Piece Goods Stores	56,450	0	(56,450)	0.00	11	34	56
Musical Instrument and Supplies Stores	96,387	0	(96,387)	0.00	19	58	96
Book Stores and News Dealers	292,711	0	(292,711)	0.00	59	176	293
General Merchandise Stores	12,417,229	837,387	(11,579,842)	0.07	2,316	6,948	11,580
Florists	155,633	0	(155,633)	0.00	31	93	156
Office Supplies, Stationery, & Gift Stores	1,057,048	347,231	(709,817)	0.33	142	426	710
Used Merchandise Stores	386,867	438,030	51,163	1.13	(10)	(31)	(51)
Other Miscellaneous Store Retailers	1,691,541	382,761	(1,308,780)	0.23	262	785	1,309
Non-store Retailers	9,961,870	6,284,473	(3,677,397)	0.63	735	2,206	3,677
Special Foodservices	883,537	169,757	(713,780)	0.19	143	428	714
Drinking Places -Alcoholic Beverages	346,537	0	(346,537)	0.00	69	208	347
Full-Service Restaurants	5,688,660	1,812,703	(3,875,957)	0.32	775	2,326	3,876
Limited-Service Eating Places	4,050,836	0	(4,050,836)	0.00	810	2,431	4,051
Cafeterias, Grill Buffets, & Buffets	106,724	0	(106,724)	0.00	21	64	107
Snack and Non-alcoholic Beverage Bars	562,691	1,596,968	1,034,277	2.84	(207)	(621)	(1,034)
Total:	\$112,645,124	\$77,741,948	(34,903,176)	0.69	6,981	20,942	34,903

Source: Environics Analytics (EA), Claritas Retail Market Power Report

Chart 27: Leakage/Surplus Index – Town of Corning - 2016



Source: Environics Analytics (EA), Claritas Retail Market Power Report

The retail analysis presented here was performed with data purchased from Environics Analytics. Data for the Town of Corning (inclusive of the Village of Riverside and Village of South Corning) was purchased as well as data for a 10-mile radius around the center of the Town of Corning. The 10-mile radius includes major retail centers in the City of Corning, Gang Mills, and the Consumer Square/Southern Tier Crossing/Arnot Mall area. This methodology was chosen because the retail offerings in the 10-mile radius represent the most likely receivers of leakage from the Town. A comparison of the data reveals the following observations:

1) Several retail sectors are non-existent within the Town and experiencing high leakage within the 10-mile radius. As mentioned previously, starting new businesses may be risky; however, the below sectors would have no competition within the Town of Corning and limited competition within the 10-mile radius (there is unmet demand for these sectors):

- Musical Instrument and Supplies Stores
- Limited-Service Eating Places
- Household Appliance Stores
- Sew/Needlework/Piece Goods Stores
- Florists
- Pharmacies and Drug Stores
- Cosmetics, Beauty Supplies, and Perfume Stores
- Cafeterias, Grill Buffets, and Buffets

2) Several retail sectors are experiencing high leakage in the Town and within the 10-mile radius. These retail sectors have existing businesses within the Town and within the 10-mile radius. As mentioned previously, expansion of these existing businesses will likely be less risky as compared to opening a new business. Among the retail sectors with the highest leakage across both the Town and 10-mile radius, automotive dealers are probably the best fit contextually. Other sectors include the following:

- Non-store Retailers
- Other Health and Personal Care Stores
- Electronics Stores
- Other Miscellaneous Store Retailers
- Home Furnishing Stores
- Gasoline Stations

3) Retail sectors in which the Town may be competitive with the 10-mile radius are those that show a high leakage in the Town and small surplus/leakage in the 10-mile radius (between 0.8 and 1.2). Chief among these are furniture stores. Others include:

- Jewelry, Luggage, and Leather Goods Stores
- Special Foodservices
- Optical Goods Stores
- Other Motor Vehicle Dealers
- Beer, Wine, and Liquor Stores

4) Retail sectors with high leakage in the Town but surplus in the 10-mile radius will likely be hard to attract to the Town. These sectors include:

- Drinking Places – Alcoholic Beverages
- Grocery Stores
- Shoe Stores
- Clothing Stores
- Full-Service Restaurants
- Office Supplies, Stationery, and Gift Stores
- Specialty Food Stores
- Sporting Goods Stores
- Book Stores and News Dealers
- General Merchandise Stores
- Hobby, Toys and Games Stores

5) Within the Town, a major surplus (>1.2) was found in the automotive parts, accessories, and tire stores, building material and supply dealers, snack and non-alcoholic beverage bars, and lawn and garden equipment and supplies stores retail sectors. These are the existing retailers for whom the Town should craft retention strategies. Used merchandise stores had a minor surplus within the Town.

IMPLEMENTATION STRATEGY

OVERVIEW

The implementation matrix has been crafted from the Town's 2013 Comprehensive Plan. Each of the recommendations of that plan was reviewed by the project steering committee. Recommendations still relevant to the current context were retained, some were removed and others were recast to be more action-oriented to the Town's goals in light of its vision for economic development. The recommendations are categorized in the sections in which they originally appeared in the 2013 plan. A "category" has been added to provide a secondary topic area for each. Phasing and priority, primary responsibility, partners in implementation, costs and funding sources are also added. The final columns of the matrix assess the recommendations' consistency with the I-86 strategy as well as with other regional planning efforts. This will be useful to the Town and its partners as they seek funding during the implementation phase.

ACRONYMS USED IN THE MATRIX

CDBG – Community Development Block Grant

CFA – Consolidated Funding Application

CNG – Corning Natural Gas

ESDC – Empire State Development Corp.

MEC – Environmental Management Council

FHWA – Federal highway Administration

GIGP – Green Innovation Grant Program

LGEG – Local Government Efficiency Grant

LWRP – Local Waterfront Revitalization Program

NYSDEC – New York State Department of Environmental Conservation

NYSDOS – New York State Department of State

NYSDOT – New York State Department of Transportation

NYSEFC – New York State Environmental Facilities Corporation

NYSEG – New York State Electric & Gas

NYSERDA – New York State Energy Research Development Authority

NYSOPRHP – New York State Office of Parks, Recreation and Historic Preservation

OCR – Office of Community Renewal

REDC – Regional Economic Development Corporation

STC – Southern Tier Central Regional Planning and Development Board

SWCD – Soil and Water Conservation District

TEP – Transportation Enhancements Program

USDA – US Department of Agriculture

USEPA US Environmental Protection Agency

Timing:

- S= Short term, 1-2 years
- M= Medium term, 3-5 years
- L= Long term, 6-10 years
- O= Ongoing

Priority:

- H=High
- M=Medium
- L=Low

IMPLEMENTATION MATRIX

Category	Recommendation	Phasing O-S -M-L	Priority L-M-H	Primary Responsibility	Partners	Cost	Funding	Consistency with I-86 Strategy	Consistency with other regional planning efforts
Section 1 – Demographics									
Transportation	Participate in regional efforts to expand local transit options	M	H	Steuben Transit, Corning Erwin Area Transit System	Town, Steuben County	Varies	NYS DOT Federal Section 5311 Program, Transportation Alternatives Program	Built Environment -- Strong Communities: Connect People and Places; Built Environment -- Physical Infrastructure: Transportation Network -- Intermodal	Regional REDC: Existing Conditions and Strategic opportunities; Infrastructure: Highways, Rail; Implementation Agenda: "Senior Living Communities"; "Southern Tier Community Revitalization Project."
Transportation	Provide housing options that are proximate to developing work and education centers	S	H	Developers	Major employers and educational institutions	Private sector	CDBG Economic Development Planning grants, Climate Smart Communities Smart Land Use Planning grants	Built Environment -- Strong Communities: Connect People and Places	Regional REDC: Vision Statement-- Vibrant Downtowns/ Municipal cores challenged by Economy, Natural Disasters.
Section 2 – Housing and Property Values									
Land Use & Zoning	Ensure the Town is responsive to changing needs for smaller and multi-family dwelling options through zoning	S	H	Town Board	Planning Board, Zoning Board	Admin	NYS DOS Local Government Technical Assistance	Built Environment -- Strong Communities: "Corridor Housing Redevelopment and Revitalization"; Built Environment -- Strong Communities: Establish a Diversity of Housing Options	Regional REDC: Existing Conditions and Strategic opportunities; Housing: Strategic Findings: Housing.
Housing	Evaluate housing needs including single-family housing development and rental market needs and inventory	S	H	Town Board	Steuben County, local and regional economic development agencies, developers	Varies	NYS HCR, REDC, local funds, private funds	Built Environment -- Strong Communities: "Corridor Housing Redevelopment and Revitalization"; Built Environment -- Strong Communities: Establish a Diversity of Housing Options	Regional REDC: Performance Measurement; "Revitalization and Community Development"; Section II -- Housing: Strategic Findings: Housing

Category	Recommendation	Phasing O-S -M-L	Priority L-M-H	Primary Responsibility	Partners	Cost	Funding	Consistency with I-86 Strategy	Consistency with other regional planning efforts
Housing	Explore programs to fund strategies to protect and upgrade the quality of Corning's housing	S	H	Town Board	Steuben County, local non-profit housing preservation corporations		Restore NY, Zombie Remediation and Prevention Initiative, CDBG non-entitlement funding (as eligible), Land Bank, NYSHCR, NYSERDA	Built Environment -- Strong Communities: "Corridor Housing Redevelopment and Revitalization"; Built Environment -- Strong Communities: Establish a Diversity of Housing Options	Regional REDC: Performance Measurement; "Revitalization and Community Development"; Section II -- Housing: Strategic Findings: Housing
Town Operations	Encourage strong and consistent code enforcement within the Town.	O	H	Code enforcement	Town Board	Admin		Built Environment -- Strong Communities: Redefine the Public Realm	Regional REDC: Performance Measurement; "Revitalization and Community Development."
Land Use & Zoning	Maintain current zoning at R-1 around the Corning Community College.	S	L	Town Board	Community College, neighbors	NA		Built Environment -- "Corridor Housing Redevelopment and Revitalization"; "Model Design Guidelines for Land Use"	Regional REDC: Performance Measurement; "Revitalization and Community Development."
Community Relations	Maintain open lines of communication between CCC, Town and residents to encourage friendly relations and cooperation	O	H	Town Supervisor, Town Board	College President, College Board and Administration, neighbors	NA		Identity and marketing -- Existing Residents and Businesses; Workforce Attraction prospects; "Building an identity for the I-86 Corridor project"	Regional REDC: Vision Statement: Broadband Networking; Economic Development Opportunities to be Seized.
Section 3 – Built Environment, Utilities and Infrastructure									
Utilities	Work with natural gas providers to ensure that availability of service reaches all homes within the Town of Corning.	M	M	NYSEG, CNG	Town	NA		Built Environment -- Physical Infrastructure: Energy	Regional REDC: Performance Measurement; "Energy Efficiency and Renewable Energy"; existing Conditions and Strategic opportunities: Natural Resources

Category	Recommendation	Phasing O-S -M-L	Priority L-M-H	Primary Responsibility	Partners	Cost	Funding	Consistency with I-86 Strategy	Consistency with other regional planning efforts
Utilities	Encourage natural gas providers to share their gas line GIS data with the Town so the Town can better plan based on infrastructure availability.	M	M	NYSEG, CNG	Town	NA		Built Environment -- Physical Infrastructure: Energy	Regional REDC: Performance Measurement: "Energy Efficiency and Renewable Energy," "Revitalization and Community Development," Vision Statement -- Broadband Communications, The Energy Industry
Utilities	Work with natural gas providers on any new compressor stations. Request that any new developments match the character of the neighborhood, screening the industrial look of a compressor station from site and creating a structure that "looks like" the surroundings.	M	M	NYSEG, CNG	Town	NA		Built Environment -- Physical Infrastructure: Energy; Information Networks	Regional REDC: Performance Measurement - "Revitalization and Community Development."
Economic Development	Work with owners of Hickling Station and NYS DEC to clean up the station and make it a better gateway into the Town of Corning.	M	H				Restore NY, BOA, USEPA	Built Environment -- Vibrant Communities; Redefine the Public Realm	Regional REDC: Performance Measurement - "Revitalization and Community Development," Vision Statement -- Public and Stakeholder Engagement Process.
Economic Development	Consider applying for a DOS Brownfields Opportunity Area (BOA) Program grant to do a full analysis of possible Brownfields within the Town.	L	M	Town		\$300,000- \$500,000	Restore NY, BOA, USEPA	Built Environment -- Physical Infrastructure: Readiness of Developable Land	Regional REDC: Vision Statement -- Public and Stakeholder Engagement Process; Existing Conditions and Strategic opportunities -- Infrastructure.
Infrastructure	Continue to follow NYS Department of Health recommendations relative to water infrastructure	O	H		Steuben County DOH			Built Environment -- Physical Infrastructure: Utility Infrastructure -- Water & Sewer	

Category	Recommendation	Phasing O-S -M-L	Priority L-M-H	Primary Responsibility	Partners	Cost	Funding	Consistency with I-86 Strategy	Consistency with other regional planning efforts
Land Use & Zoning	Develop a zoning matrix to outline water and on-site septic requirements such as the one used by the Town of Big Flats.	S	H	Code Enforcement, Zoning Board	Town			Built Environment -- Strong Communities: "Corridor Housing Redevelopment and Revitalization"; Built Environment -- Physical Infrastructure: Utility Infrastructure - Water & Sewer	Regional REDC: Performance Measurement-- Revitalization and Community Development."
Land Use & Zoning	Maintain and enforce current zoning law requiring parcel size of 2 acres and density as defined by the zoning law's density chart. Only consider changes if public sewer becomes available.	S	H	Code Enforcement, Zoning Board	Town Supervisor, Town Board	N/A		Built Environment -- Strong Communities: "Corridor Housing Redevelopment and Revitalization"; Built Environment -- Physical Infrastructure: Utility Infrastructure - Water & Sewer	Regional REDC: Performance Measurement-- Revitalization and Community Development."
Community Relations	To create more transparency within local government, consider regular meetings concerning water and sewer needs of the Town. Create a regular forum (2-4 times a year) that allows residents' voices to be heard and serves as public education to better explain why upgrades may be more cost effective sooner rather than later.	M	M	Town Supervisor, Town Board	Code Enforcement	NA		Human Capital; Built Environment: Physical Infrastructure: Water & Sewer	Regional REDC: Vision Statement -- Public and Stakeholder Engagement Process. Part 2. Organizational Structure to Ensure Plan Implementation and Ongoing Public Participation.
Intergovernmental Cooperation	The Town of Corning administration continue to work closely with all neighboring municipalities to determine future needs, desires and realities when it comes to the extension of sewer infrastructure.	O	H	Town Supervisor, Town Board	City of Corning, Town of Erwin, Town of Big Flats, Steuben County, Chemung County, major employers and property owners, regional economic development agencies, Corning Guthrie Hospital	LGE	\$12,500 per municipal participant; local match	Built Environment -- Physical Infrastructure: Utility Infrastructure - Water & Sewer; "Readiness of Developable Land"	Regional REDC: Existing Conditions and Strategic opportunities-- Infrastructure; Part 2. Organizational Structure to Ensure Plan Implementation and Ongoing Public Participation