



Cattaraugus County

ECONOMIC STRATEGIC PLAN

Cattaraugus County, NY

January 20, 2022



ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™

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The Department also appreciates Empire State Development and the County Legislature for understanding the need and providing the financial support necessary to produce this Study.

We would also like to thank the many participants in our interview outreach and focus group roundtables. Their generosity of time and consideration added depth and texture to our analysis.

EXECUTIVE SUMMARY

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Project Scope

4ward Planning and Barton & Loguidice were retained by the County of Cattaraugus Department of Economic Development, Planning, and Tourism (EDPT) to create an Economic Development Strategic Plan for Cattaraugus County that provides a policy direction for economic growth, builds upon County strengths and assets, and identifies strategies, programs, and projects to improve the local economy. As illustrated below, our comprehensive market analysis and outreach permits a strong foundation upon which to identify market-viable development sites and strategic actions for the County.

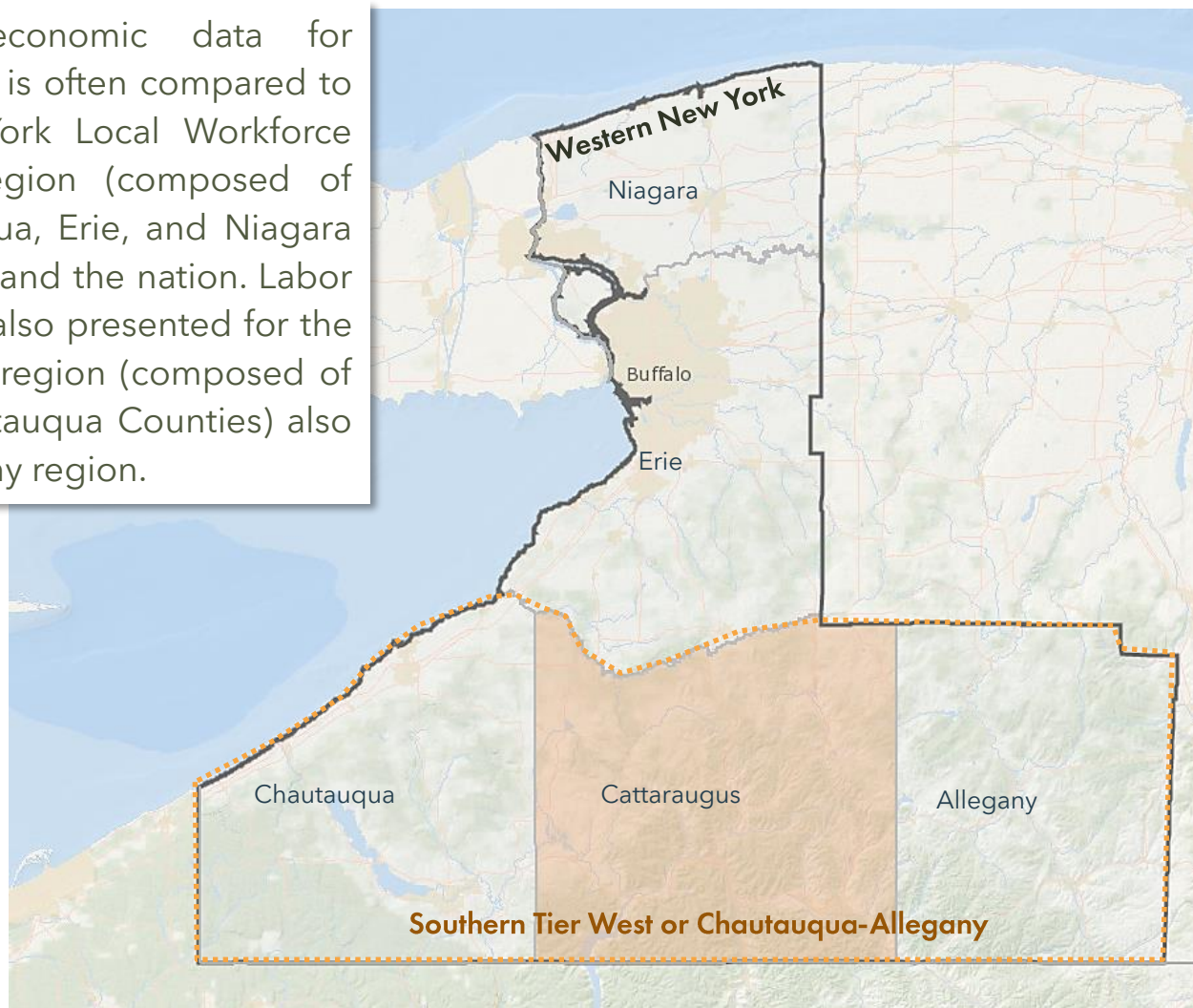


Study Areas

To establish context, socio-economic data for Cattaraugus County in this report is often compared to the five-county Western New York Local Workforce Development Areas (LWDA) region (composed of Allegany, Cattaraugus, Chautauqua, Erie, and Niagara Counties), the State of New York, and the nation. Labor and industry and tourism data is also presented for the three-county Southern Tier West region (composed of Allegany, Cattaraugus, and Chautauqua Counties) also known as the Chautauqua-Allegany region.



Source: Esri, 2021.



Study Takeaways & Recommended Actions

Key market challenges, economic development opportunities, and recommended actions are summarized below and presented in more detail on the following pages.

	Market Challenges	Market Opportunities	Recommended Actions
Supporting Skilled Trades	<ul style="list-style-type: none"> Decades of a shrinking population and labor force with very little income growth. Aging of the population and the local workforce means many existing workers may be approaching retirement. Skilled trades and manufacturing companies around the country are finding it increasingly difficult to attract young people into their industries. 	<ul style="list-style-type: none"> The metal and machinery manufacturing cluster is the only significant existing traded industry cluster in the County with above average earnings potential. Local workforce should be properly trained for priority occupations with higher earning potential. Potential to leverage existing educational institutions, <i>Dream It Do It</i> program in the County, local building trades organizations, and area high schools. 	<ul style="list-style-type: none"> Develop an <u>ambassadors program</u>, whereby local young people trained and employed in the building trades or manufacturing sector visit high schools on career days and share their experiences and answer questions about working in the trades or manufacturing. Enlist an advertisement firm to develop skilled trades and manufacturing jobs <u>collateral and video materials</u>.
Promoting Small Business Succession	<ul style="list-style-type: none"> Many County businesses are likely owned and operated by persons 40 and over and may lack business succession plans. 	<ul style="list-style-type: none"> A large share of businesses within the County are family-owned and operated, including manufacturing and trades businesses. Succession plans can help ensure that existing business and jobs remain in the County long-term. 	<ul style="list-style-type: none"> Hold <u>bi-annual webinars</u> to inform county businesses about business succession planning. <u>Conduct visits</u> to locally owned businesses to discuss the importance of succession planning.

Study Takeaways: Economic Development

Decades of a shrinking population and labor force with very little income growth present challenges.

- In contrast to New York State and the nation, both Cattaraugus County and the Western NY region have experienced negative, albeit relatively flat population growth for decades (changing by between -0.1 and -0.6 percent per year since 1980).
- According to the U.S. Bureau of Labor Statistics (BLS) data, Cattaraugus County's labor force has been decreasing since 1997 (when it was 42,410 persons). As of July 2021, there are 32,810 people in the County's labor force (9,600 fewer than in 1997). Declines in the size of the County's labor force are likely due to shrinking local employment opportunities, an aging workforce, and increasing retirements. This will challenge local employers to keep wage rates stable.

- After adjusting for inflation, the median household income in the County has been relatively flat over the past three decades. For example, in 2019, the County's median household income was \$50,780, compared to the real median household income of \$50,758 in 1989, after adjusting for inflation.

The aging of the population and the local workforce, in particular, will negatively impact many industries.

- The County and region are expected to experience the fastest population growth among adults over age 65 and, to a lesser degree, adults ages 35 to 44 (the age cohort representing early-stage families). Younger workers are crucial to sustaining service, construction and manufacturing businesses and as this population dwindles, County area employers will be challenged to either raise wages or increase automation, where possible.

Study Takeaways: Economic Development (continued)

Efforts should be made to ensure the local workforce is properly trained for priority occupations with higher earning potential.

- The table below presents priority occupations that are in high demand within the Chautauqua-Allegany region and are priority occupations in the Western NY region. All occupations, except personal care aides, have a median annual wage higher than the current average in Cattaraugus County (\$36,220). While most occupations require some on-the-job training, none require prior work experience. Registered nursing is the top in-demand priority occupation in the region.

Occupational Title	Median Annual Wages (2021)	Typical Education Needed For Entry	Typical OTJ Training Needed
Registered Nurses	\$91,580	Bachelor's Degree	None
Correctional Officers & Jailers	\$71,990	High School Diploma	Moderate-term
Industrial Machinery Mechanics	\$62,510	High School Diploma	Long-term
Tool and Die Makers	\$58,680	High School Diploma	Long-term
Licensed Practical and Licensed Vocational Nurses	\$52,340	Postsecondary Non-degree Award	None
Welders, Cutters, Solderers, and Brazers	\$51,210	High School Diploma	Moderate-term
Machinists	\$49,770	High School Diploma	Long-term
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	\$43,900	High School Diploma	Moderate-term
Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	\$43,390	Postsecondary Non-degree Award	Moderate-term
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	\$42,900	High School Diploma	Moderate-term
Grinding, Lapping, Polishing, Buffing Machine Tool Setters, Operators, Tenders, Metal Plastic	\$40,450	High School Diploma	Moderate-term
Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	\$39,780	High School Diploma	Moderate-term
Personal Care Aides	\$32,020	High School Diploma	Short-term

Source: New York State Department of Labor, Division of Research & Statistics, Short-Term Occupational Employment Projections, 2020-2022, Currently Posted Priority Occupations by the Western Region and LWDA's

Study Takeaways: Economic Development (continued)

Existing educational institutions are assets for properly training the younger workforce for growth occupations providing higher wages.

- The educational services sector is a top employer in the County, representing 17 percent of total jobs. The County's relatively high share of education sector employment is likely due to the presence of higher educational institutions such as St. Bonaventure University and Jamestown Community College. While this sector has experienced recent job loss (declining by 630 jobs from 2000 to 2020), the County has the potential to take advantage of existing educational institutions.
- Given the County's relatively low levels of educational attainment (the share of adults with a bachelor's degree or higher is half that within the State), efforts must be made to ensure the younger workforce is properly trained to replace the region's aging workforce (in

manufacturing and trades sector, computer, advanced manufacturing/STEM, and soft skills).

The health care sector is relatively small and declining but provides priority growth occupations.

- The health care sector lost approximately 990 jobs over the past two decades and saw a sharp decline over the past two years, likely due to the Covid-19 crisis. The current share of jobs in the County's health care and social assistance sector (16 percent) is much lower than that in the region (20 percent). As presented on the previous page, the health care sector contains some of the priority occupations with high growth potential identified for the region (registered nurses, licensed practical and licensed vocational nurses, and personal care aides).

Study Takeaways: Economic Development (continued)

Tourism is a significant driver of the economy but offers relatively low-wage job opportunities.

- The County has several assets that provide year-round tourism opportunities, including outdoor recreational areas, sporting and recreational events, cultural institutions (universities and colleges, museums and galleries, historical and cultural facilities, etc.).
- In 2019, the \$240 million in direct tourism spending in Cattaraugus County supported approximately 4,980 jobs, which generated \$68 million in direct labor income and \$112 million including indirect and induced impacts. Within the Southern Tier West region, Cattaraugus County is the county most dependent upon tourism, with 9.7 percent of all labor income generated by visitors and 17 percent of all employment sustained by visitors.
- Given the significant number of jobs in the food services and drinking places industry (approximately 2,000) and high employment location quotient (LQ) in the accommodation industry (3.33 employment), the tourism cluster (also known as the “arts, entertainment, recreation and visitor industries” cluster) is a significant driver of the County’s economy.
- While tourism brings new dollars into the area in the form of outside visitor spending, service jobs in this cluster are often part-time or seasonal and provide relatively low average annual earnings. For example, the accommodation industry offers an average annual wage of just \$20,060 in the County. The top five industries by output within this cluster currently generate approximately \$272 million in economic output and \$116 million in intermediate inputs (purchases of non-durable goods and services) in the County.

Study Takeaways: Industry Cluster Analysis

There is one significant existing traded industry cluster with earnings potential in the County.

- The metal and machinery manufacturing cluster is the only significant existing traded industry cluster in the County with above average earnings potential (more information is provided on the following page). Traded industry clusters are those which generate revenue by selling goods and services to customers outside the County. By contrast, other clusters, such as professional and business services, financial services, construction, or health care and social assistance, typically supply the local market and exist regardless of competitive advantages offered by specific locations. For example, although the ambulatory health care services industry is a major County employer, it is traditionally seen as a non-traded sector, meaning the industry does not contribute to creating and exporting goods beyond the region.
- Industries were considered significant clusters if

they provide an average wage above the County's existing average (\$35,020) and have existing employment LQ above 1.2, when compared to the nation. While other potential clusters like agribusiness, food processing and technology (mainly within the animal production and aquaculture subcluster) and forest and wood products have relatively high employment LQs and provide some growth potential, these clusters employ relatively few County residents (less than 500 private jobs in each cluster) and provide limited earnings potential (with average annual wages just slightly above the existing average).

- Considering the County's manufacturing sector lost 3,475 jobs from 2000 to 2020, the ability of this cluster to leverage economic development will depend on whether local firms can find skilled labor and remain globally competitive, incorporating new technologies and a growing market base.

Study Takeaways: Industry Cluster Analysis (continued)

The fabricated metal product manufacturing subcluster is dominated by cutlery, utensil, pot, and pan manufacturing.

- The fabricated metal product manufacturing subcluster involves the transformation of metal into intermediate or end products other than machinery, computers and electronics, and metal furniture, or treat metals and metal-formed products fabricated elsewhere. Given the significant number of private sector County jobs in this subcluster (approximately 920 jobs), recent job growth (115 new jobs from 2017 to 2021), high employment LQ (3.52), and wage potential (average annual wage of \$74,260), this subcluster is increasingly driving the County's economy. According to 2019 data provided by IMPLAN, the cutlery, utensil, pot, and pan manufacturing sector alone generates \$272 million in economic output in the County.

The machinery manufacturing subcluster is dominated by air and gas compressor manufacturing.

- The machinery manufacturing subcluster involves the creation of end products that apply mechanical force (e.g., the application of gears and levers to perform work). Given the significant number of private sector County jobs in this subcluster (840 jobs), high employment LQ (4.21), and wage potential (average annual wage of \$74,980), this subcluster is a significant driver of the County's economy. According to IMPLAN, in 2019, the air and gas compressor manufacturing sector alone generates \$399 million in economic output in the County.
- As previously presented, these two subclusters also contain many of the priority occupations with high growth potential identified for the region (e.g., industrial machinery mechanics, welders, machinists, etc.).

Recommended Actions

The culmination of our comprehensive market analysis, interviews with local stakeholders, municipal roundtables, and SWOT analysis can be found in the study takeaways and recommended actions. The following recommendations arise from key challenges identified in this analysis, which focus on supporting Cattaraugus County's skilled trades and promoting small business succession.

Supporting Skilled Trades

- In collaboration with the well-established and successful *Dream It Do It* program in Cattaraugus County (currently known as *Dream It Do It 2.0*), local building trades organizations, and area high schools, **the County should develop an ambassadors program**, whereby local young people trained and employed in the building trades or manufacturing sector visit

high schools on career days and share their experiences and answer questions about working in the trades or manufacturing. The purpose is to have someone (preferably a person younger than 25) relatable to high school students convey insights on well-paying careers as alternatives to attending college.

- **The County should enlist the services of an advertisement firm to develop collateral and video materials showing young people working in the skilled trades and manufacturing jobs.** The materials will also emphasize earnings potential and draw comparisons to occupations requiring college degrees and associated costs.

Recommended Actions (continued)

Promoting Small Business Succession

- **Cattaraugus County should hold bi-annual webinars informing county businesses about business succession planning, inclusive of legal and tax implications.** The County would collaborate with local tax accounting and business law professionals who would sponsor and conduct the webinar events. The County will need to partner with local municipalities, chambers of commerce, local banks, and accounting professionals to ensure appropriate outreach to area businesses.
- **The County should schedule visits to locally owned businesses with 25 or more employees to discuss the importance of succession planning** and find out what, if anything, the County can do to assist businesses in this endeavor.

SUMMARY OF PLANS & STUDIES

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



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Methodology: Summary of Plans & Studies

The following existing plans were reviewed and presented in more detail on the following pages.

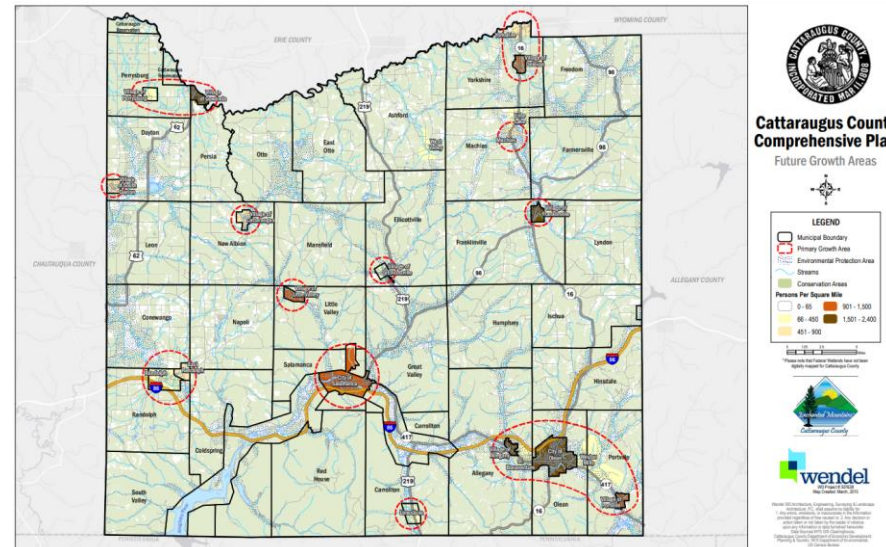
- Vision 2025 Comprehensive Plan (2015)
- Southern Tier West Region Comprehensive Economic Development Strategy (2020)
- Cattaraugus County Agricultural and Farmland Protection Plan (2020)
- Economic Impact of Visitors in New York 2019: Chautauqua-Allegany Focus (2019)
- State of the Region: Western New York 2021 Annual Report (2021)
- Cattaraugus County Coordinated Public Transit-Human Services Transportation Plan (2019)
- Cattaraugus County Countywide Trail System Plan (2017)
- Countywide Arts, Culture, and Heritage Plan (2017)

Vision 2025 Comprehensive Plan

The County's Comprehensive Plan, completed in 2015, identifies the County-wide vision for future development. The Plan's seven goals state that Cattaraugus County will:

1. Retain its vital, rural character
2. Have a strong, sustainable economy where residents can support their families and their quality of life
3. Preserve and promote its agricultural heritage and economy
4. Promote tourism and foster local arts and cultural organizations
5. Protect its important environmental assets - for both their ecological and their economic value
6. Revitalize and restore its cities, villages, and hamlets as strong, attractive, vital centers
7. Promote a greater range of options for transportation and housing for its residents
8. Promote healthy and safe communities

The Plan identifies several future growth areas, including the County's two cities (Olean and Salamanca), nine villages, and selection of other densely populated communities. The Plan suggests that these areas should be prioritized for public and private investments.



Source: Cattaraugus County & Wendel, 2015

Finally, the Plan also offers insight on economic conditions and opportunities (Section V). Agriculture, mineral resources, and forestry are identified as the County's key industries. Preserving prime agricultural soils, pursuing reclamation planning and resolving land use conflicts, and supporting placemaking in activity centers are recommended to support future economic growth. At the same time, the Plan suggests that retaining the County's rural character would support the local tourism industry, which is rooted in outdoor recreation and natural resources.

Southern Tier West Region Comprehensive Economic Development Strategy

The 2020 Southern Tier West Region Comprehensive Economic Development Strategy establishes five economic development goals for Allegany, Cattaraugus, and Chautauqua Counties:

1. Develop a skilled labor force
2. Improve traditional and non-traditional infrastructure
3. Support new business growth, particularly those which are technology-based, value added, and net export businesses
4. Create quality, connected places where people want to live, work, and conduct business
5. Engage in coordinated, collaborative efforts to achieve economic development initiatives

The Plan also identifies priority economic development projects for implementation within the county specifically. These include:

1. Olean/Town of Portville Water Line Extension Route 417 Project
2. Town of Allegany I-86 Exit 24 Interchange Wastewater Infrastructure Development Project
3. Village of Little Valley Wastewater Infrastructure Project
4. City of Salamanca State Park Avenue Upgrade Project
5. Town of Ellicottville Regional Water Project
6. Olean Business Incubation Center Project Phase 2
7. African American Cultural Center Project
8. Pathways to Success: Seneca Nation Arts and Crafts Tourism Initiative
9. Historic Hollywood Theater Project



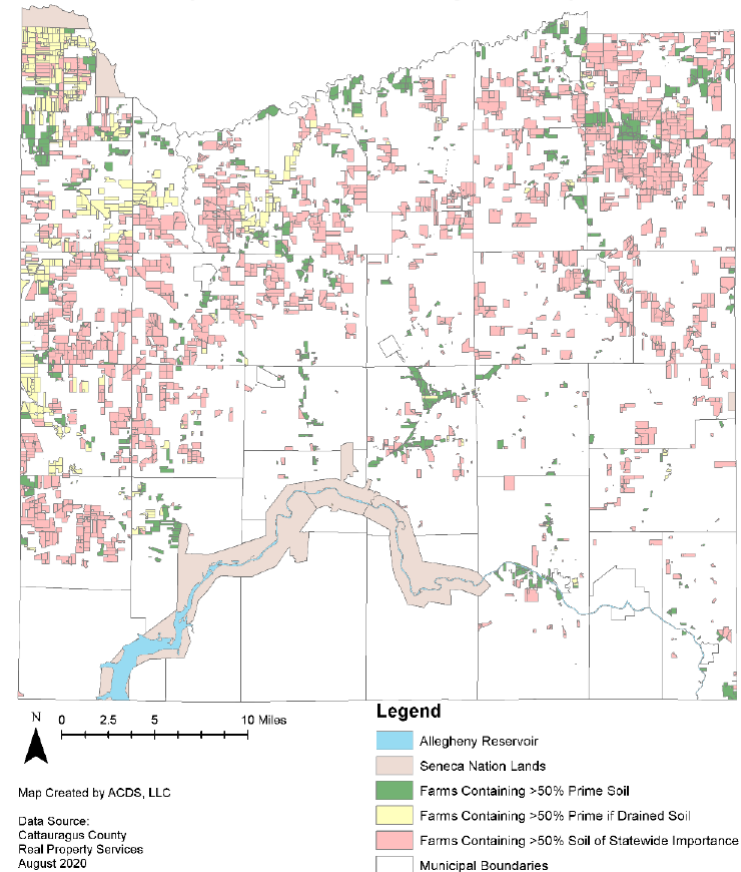
Cattaraugus County Agricultural and Farmland Protection Plan

In conformance with NYS Agriculture & Markets Law Article 25-AAA Section 324, the Cattaraugus County Agricultural and Farmland Protection Plan, updated in 2020, identifies lands which should be preserved for agricultural uses. These areas are largely determined by soil quality; according to the USDA, 15 percent of the County is prime farmland. Using a Land Evaluation and Site Assessment system, Cattaraugus County has mapped and prioritized sites for farmland protection (at right). Future development initiatives should reflect these priority areas and the intent to preserve agricultural uses.

In addition to the protection of these priority agricultural areas, the Plan offers the following recommendations:

1. Create a rural and resources-based industries incubator
2. Grow tourism within resource-based industries
3. Support specialized training and labor force training within the resource-based industry
4. Create farmland protection learning opportunities for public and private entities
5. Support a balance of agricultural and non-agricultural on-site uses
6. Assist agricultural landowners with conservation and funding opportunities

Priority Farmland in Cattaraugus County, NY



Source: Cattaraugus County, 2020

Economic Impact of Visitors in New York 2019: Chautauqua-Allegany Focus

The Chautauqua-Allegany Focus of the 2019 report, “Economic Impact of Visitors in New York,” offers insight into the tourism industry within Chautauqua, Allegany, and Cattaraugus County. Overall, the report determines that, without tourism, the average household within this region would have to pay an additional \$718 per year to maintain the same local and state tax revenues.

In Cattaraugus County specifically, the tourism industry accounted for \$240 million in sales, 4,982 jobs (totaling \$112.3 million in labor income), and \$15.6 million in local taxes. The largest portion of the \$240 million in visitor spending resulted from food and beverages (\$63.7 million), recreation (\$51.3 million), and second homes (\$43.8 million). From 2017 to 2019, Cattaraugus County experienced the slowest growth in traveler spending throughout the three-county region with a growth rate of 1.0 percent. Despite this, out of the three counties, Cattaraugus County is still considered the most dependent on tourism.

“Cattaraugus County is the most dependent upon tourism with 9.7% of all labor income generated by visitors.”¹

“Cattaraugus County is again the most dependent upon tourism with 17.0% of all employment sustained by visitors.”²

¹ Compared to 7.6 percent within the region, overall.

² Compared to 12.5 percent within the region, overall.

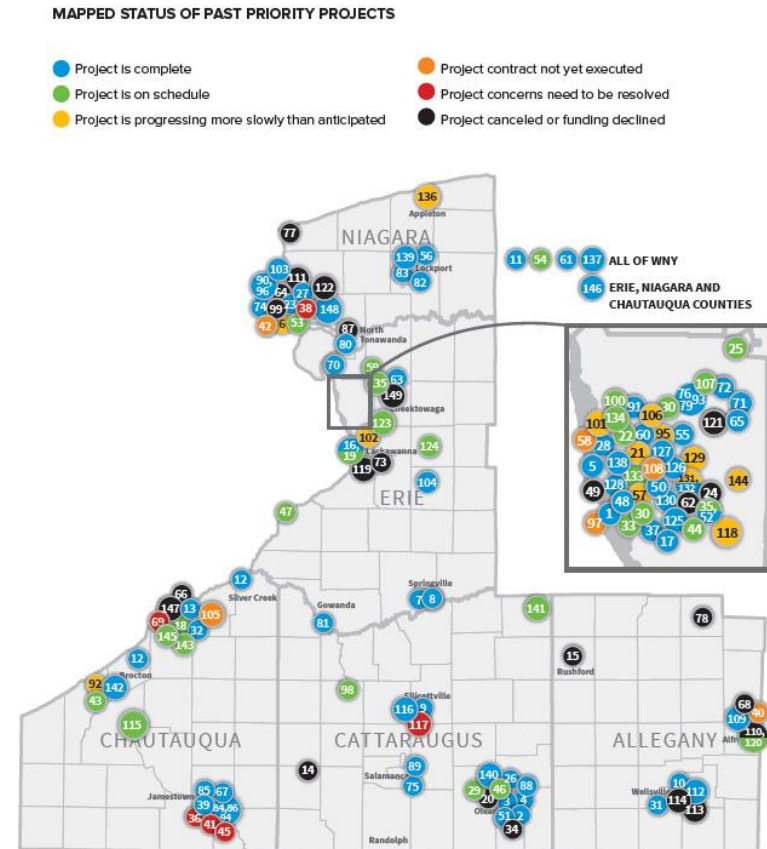
Source: Tourism Economics, 2019

State of the Region: WNYREDC 2021 Annual Report

The 2021 Annual Western New York Regional Economic Development Council (WNYREDC) State of the Region Report establishes that “New York State drives economic growth by investing in placemaking, innovation, our workforce, and tradable sectors.” Sector strategies to drive economic growth are identified in the report and include:

1. Implementing smart growth
2. Fostering a culture of entrepreneurship
3. Preparing our workforce
4. Supporting research and competitiveness in advanced manufacturing
5. Stimulating growth in the health and life sciences industry
6. Facilitating the growth of quality tourism product

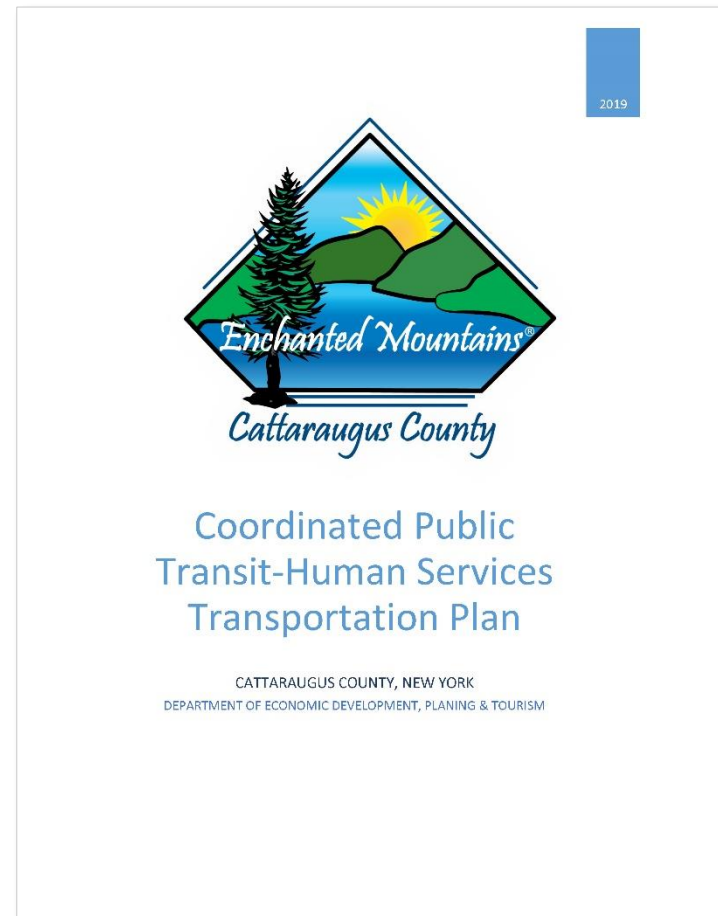
In addition to these strategies, the Report provides an overview of Consolidated Funding Application (CFA) awards across WNYREDC. More specifically, the Report identifies CFA projects that reflect all of the WNYREDC’s core strategies – these are known as priority projects. In Cattaraugus County, completed priority projects are predominately centered in and around the City of Olean, City of Salamanca, and Village of Ellicottville, with one in the Village of Gowanda.



Source: WNY REDC, 2021

Cattaraugus County Coordinated Public Transit-Human Services Transportation Plan

According to Cattaraugus County's 2019 Coordinated Public Transit-Human Services Transportation Plan, Cattaraugus County's transportation system is supported by five public/private transit systems - Access Allegany, First Transit, Olean Area Transit System, Seneca Transit System, and Wyoming Transit Service - along with a few other regional and private transportation operators. Many households in the County do not have access to a personal vehicle, particularly in the Cities of Olean and Salamanca and Towns of Persia, Leon, Conewango, Yorkshire, Franklinville, and Allegany. Moreover, much of the County lacks adequate public transportation service. The Plan specifically identifies Central Cattaraugus County as an area with no service, and Northern Cattaraugus County and the Village of Gowanda as underserved areas.

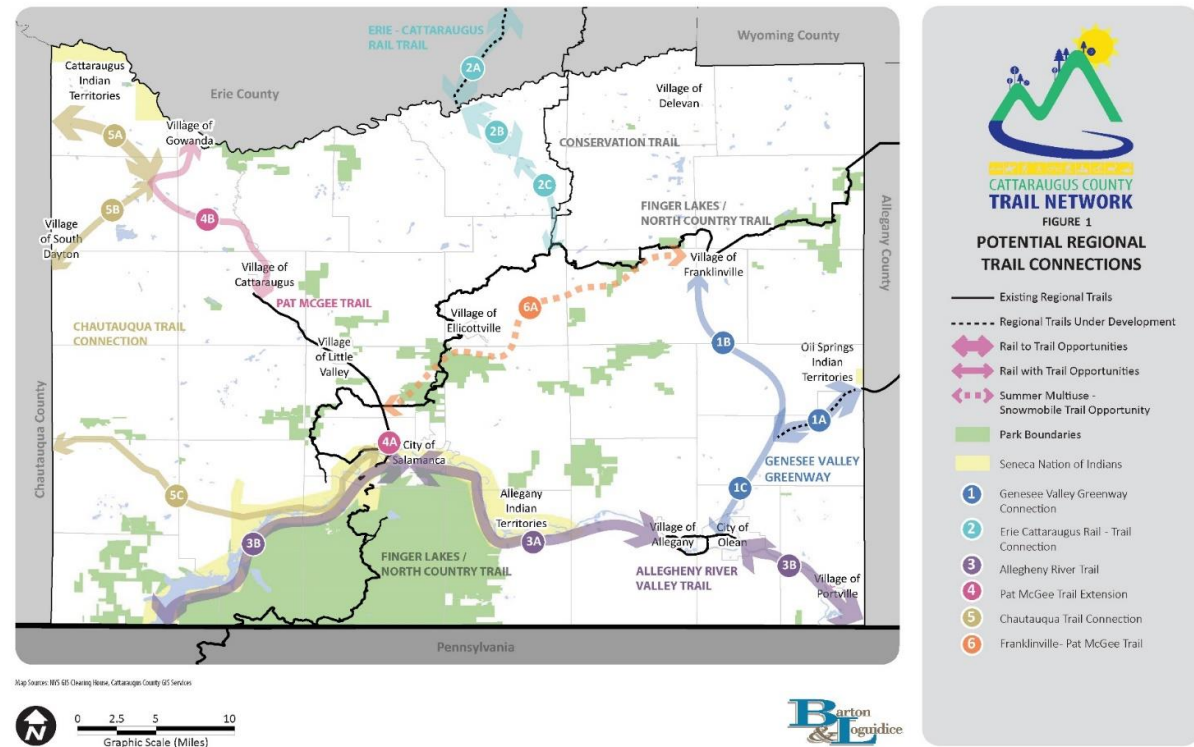


Cattaraugus County Countywide Trail System Plan

Cattaraugus County is home to a vast network of regional, hiking, bicycling, cross country skiing, snowshoeing, roller skating/blading, snowmobiling, all-terrain vehicle, and blue-way trails. Several trails are currently under development and the Countywide Trail System Plan recommends the following six additional trail development projects for implementation:

- Genesee Valley Greenway Connection
- Erie Cattaraugus Rail - Trail Connection
- Allegheny River Trail
- Pat McGee Trail Extension
- Chautauqua Trail Connection
- Franklinville - Pat McGee Trail

Beyond recommending new trails and facility improvements, the Plan identifies key opportunities for Village and business development. One such opportunity is participating in Trail Town programs, which encourage and support business development along trails.



Source: Cattaraugus County, 2017

Countywide Arts, Culture, and Heritage Plan

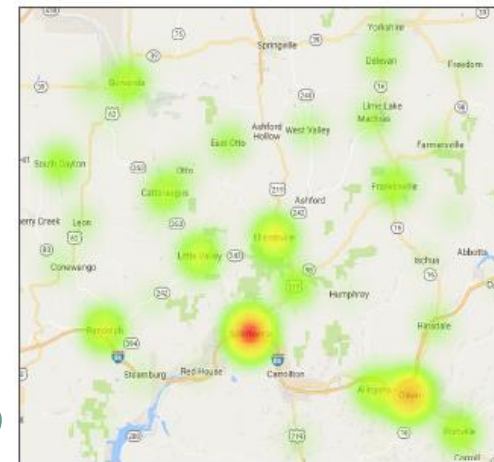
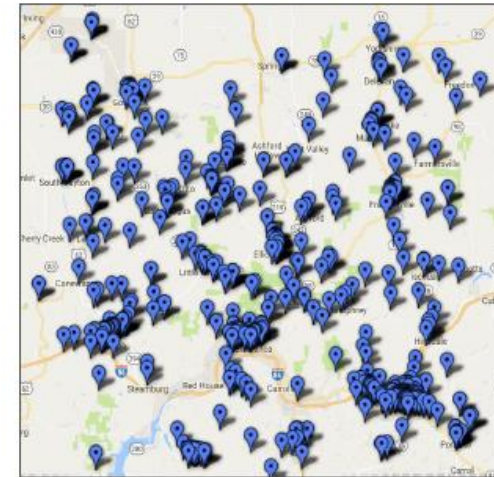
The 2017 Countywide Arts, Culture, and Heritage Plan identifies 1,042 cultural resources across Cattaraugus County. These resources are largely centered around the Cities of Olean and Salamanca, followed by the Villages of Allegany, Cattaraugus, Ellicottville, Franklinville, Gowanda, Little Valley, and South Dayton, and Town of Randolph. The cultural economy supports 605 jobs within the County, 465 of which are held by County residents.

The majority of cultural assets are categorized as Amish assets (19.7 percent), cultural facilities and spaces (19.5 percent), cultural heritage (14.4 percent), and cultural industries (14.0 percent). A survey of the community revealed that residents would be most likely to support the County investing in library services, indoor space for festivals and events, and a live performance theater.

The Plan identifies four goals for growing the County's cultural industry:

1. Enable cultural investments with supportive communication and coordination efforts
2. Leverage culture to attract and retain people as key drivers of innovation and economic growth
3. Revitalize, restore, and animate downtowns and cores through cultural investment
4. Create an environment where enhanced cultural activities can take place

FIGURE 5: LOCATION OF CULTURAL ASSETS



Source: Cattaraugus County, 2017

STAKEHOLDER OUTREACH & SWOT ANALYSIS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



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Key Findings: SWOT Analysis

Strengths (Internal)

- Natural resources, open space, trails
- Over 100 different tourism attractions
- \$240 million in direct tourism spending
- Low cost of living compared to the state and U.S.
- *Dream It, Do It* program
- Existing educational institutions
- Business-friendly climate and low local taxes
- Metal and machinery manufacturing cluster as a significant traded industry cluster
- Existing “capture” of retail sales in restaurants and other eating establishments
- Agriculture is integral to the County’s identity
- Destigmatization of skilled trades
- Promote training of younger workforce to replace retiring workers in living-wage jobs
- Coordination of entrepreneurship initiatives between higher ed institutions and the County
- CDBG funding targeted for the rehab of housing for low-income workers near business service areas
- Repurposing underperforming shopping centers
- Opportunities and funding sources are available to redevelop brownfields
- Stronger cross-marketing and promotion of tourism and recreation assets
- Synergies between tourism and agriculture

Opportunities (External)

Weakness (Internal)

- Little real income growth
- Lower educational attainment levels
- Lack of robust health care infrastructure
- Relatively little new housing being constructed
- 65% of vacant housing due to seasonal, recreational, or occasional use
- Lack of adequate infrastructure (broadband connectivity; electricity, gas, and water/sewer along transport corridors; public transit to dedicated employment centers; road infrastructure to support tourism and agriculture industries along Amish Trail)
- Lack of lodging near tourism and recreation attractions
- Shrinking population
- Aging population and workforce due to younger people moving away
- Onerous state regulations, costing the County jobs and investment
- Loss of manufacturing jobs
- Lack of workers with soft skills
- Lack of succession plans among local businesses
- Poor coordination and/or communication between Seneca Nation and the County
- Climate change impacting weather-related tourism opportunities

Threats (External)

Methodology: Focus Groups

After receiving a list of stakeholders provided by the Cattaraugus County Department of Economic Development, Planning & Tourism, 4ward Planning conducted targeted focus group discussions with the County's economic development, municipal, higher education and workforce development, and tourism and heritage leaders, as well as agricultural land-use and planning representatives, and manufacturers for substantive conversations regarding key elements of the County's economic development. Each online group meeting lasted for an hour, on average, with individuals given opportunities to respond to and raise questions. Additionally, 4ward Planning conducted an individual interview of Great Lakes Cheese leadership. In total, we spoke with 51 community leaders, the feedback from whom has been essential in confirming and rounding out our study findings. Contact details can be found in the Appendix of this document. Findings from the SWOT analysis, which identified County strengths and weaknesses (internal), and opportunities and threats (external), are summarized on the next page and provided in more detail on subsequent pages.



SWOT Analysis: Strengths

Natural resources, open space, trails

Cattaraugus County offers a wealth of natural assets and recreational options, buffeted by the countywide trail-planning and mapping and signage initiatives. Further, the County's outdoor activities flourished and gained a wider audience during the Covid pandemic.

Over 100 different tourism attractions

Cattaraugus County's unique and varied cultural and historical assets have helped establish tourism as an important driver of the County's economy.

\$240 million in direct tourism spending

In 2019, the \$240 million in direct tourism spending in Cattaraugus County supported approximately 4,980 jobs. Within the Southern Tier West region, Cattaraugus County is the county most dependent upon tourism.

Low cost of living and high quality of life

Cattaraugus County offers residents a low cost of living and high quality of life. For those looking to migrate from urban or costal areas, the County has an opportunity to attract newcomers and former residents.

Dream It, Do It program

Dream It, Do It, an engaging, well-run program has allowed County employers to engage with local students through presentations and tours. Program outreach has doubled over the last year, with more schools participating.

Existing educational institutions

Existing educational institutions are assets for properly training the younger workforce for growth occupations providing higher wages. The Boards of Cooperative Educational Services (BOCES) program is an important player in economic development, with a wide variety of people being trained. Apprenticeship programs at the BOCES level should be encouraged.

Business-friendly climate

Local business owners report that Cattaraugus County makes every effort to assist and accommodate the business community - an attractive feature for prospective investment.

Metal and machinery manufacturing cluster as a significant traded industry cluster

The metal and machinery manufacturing cluster is the only significant traded industry cluster in the County and provides above-average earnings potential. As such, it should remain a focus for the County's business development and workforce training efforts.

Existing "capture" of retail sales in restaurants and other eating establishments

The County is experiencing the greatest "capture" of retail sales in restaurants and other eating establishments - meaning that either people living outside the County purchase food items inside the County, or people living within the County consume more than would be expected, given their income levels.

Agriculture as integral to the County's identity

As an important element of Cattaraugus County's identity and quality of life, agriculture and programs supporting it should continue to be promoted.

SWOT Analysis: Weaknesses

Little real income growth

After adjusting for inflation, the median household income in the County has been relatively flat over the past three decades. Stagnant income growth may be a deterrent for prospective residents and workers.

Lower educational levels

The level of educational attainment in Cattaraugus County is lower than that in the larger region, likely reflecting the great majority of occupations in the County that do not require a four-year degree - making it challenging to entice prospective businesses requiring a more educated workforce.

Lack of robust health care infrastructure

Access to health care in Cattaraugus County is limited. This, combined with an aging population with naturally increased need for health care services may be deterrents for current and prospective residents to remain in or move to the County. The current share of jobs in the County's health care and social assistance sector is much lower than that in the region, and the County's educational institutions report graduates of their medical programs often leave the County for jobs elsewhere.

Relatively little new housing being constructed

Inflated costs of new construction and relatively high property taxes discourage new construction and the retention of a younger population and workforce.

65% of vacant housing due to seasonal, recreational, or occasional use

The number of "for seasonal, recreational, or occasional use" units (vacant units used only in certain seasons or other occasional use) in the County (5,670 units) represents a relatively large share (65 percent) of all vacant units in 2019.

Lack of adequate infrastructure

Cattaraugus County faces a lack of adequate infrastructure including broadband connectivity; public transit to dedicated employment centers; electricity, gas, and sewer/water along strategic transport corridors (e.g., Route 219); and road infrastructure to support tourism and agriculture industries along the Amish Trail. A rural county characterized by low-density development, Cattaraugus County faces difficulties in providing the infrastructure needed to support business development. Infrastructure gaps must be addressed if economic development is to be supported.

Lack of lodging near tourism and recreation attractions

Some tourism and recreation attractions report that visitors are often challenged in finding adequate lodging nearby, which would allow them to stay in the area for more than a day. New, strategically placed lodging options might encourage greater tourism and recreation expenditures in the County.

SWOT Analysis: Opportunities

Destigmatization of skilled trades

There is a countywide as well as national misunderstanding of the benefits (e.g., lack of burdensome debt, attractive salaries) of entering the skilled trades, as opposed to attending traditional four-year colleges. In partnership with industry leaders and secondary schools, the County should launch a focused public education campaign promoting and destigmatizing careers in the skilled trades.

Properly training younger workforce to replace retiring workers

Given the County's relatively low levels of educational attainment, efforts should be made to ensure the younger workforce is properly trained to replace the region's aging workforce (in manufacturing and trades sector, computer, advanced manufacturing/STEM, and soft skills).

Coordination of entrepreneurship initiatives between higher ed and the County

While there are emerging entrepreneurship initiatives among some of the County's higher ed institutions (e.g., St. Bonaventure, JCC), these initiatives could be coordinated with the County - strengthening their outreach and effect.

CDBG funding targeted for the rehab of housing for low-income workers

With the challenges of locating quality affordable workforce housing and the presence of blighted properties in some areas of Cattaraugus County, Community Development Block Grant (CDBG) funding could provide solutions for both low-income workers and struggling properties.

Repurposing underperforming shopping centers

The County's underperforming shopping center sites are likely in need of being renovated, adaptively reused, or redeveloped. Identifying and planning their transformations can revitalize these strategically situated commercial areas.

Opportunities and funding sources are available to redevelop brownfields

Flexible zoning and other incentives can be used to facilitate conversion/redevelopment of obsolete and vacant buildings for new or mixed uses. There should be more public education on the availability and benefits of investing in brownfields redevelopment.

Stronger cross-marketing and promotion of tourism and recreation assets

Cattaraugus County's wealth of tourism and recreation assets could benefit from more robust cross-promotion. Improved signage and geofencing (text messaging) campaigns, while potentially costly, can be effective. Coordinated bus tours (perhaps created in partnership with adjacent counties) might reach wider audiences - particularly those hesitant to visit independently. Finally, online marketing, particularly of assets with national and international appeal (e.g., Underground Railroad, Chautauqua Trail, Amish Trail) should be amplified.

Synergies between tourism and agriculture

Although there are existing synergies between the County's tourism and agriculture industries (e.g., Pumpkinville, beverage industry tours), the two could significantly increase mutually beneficial partnerships and programs.

SWOT Analysis: Threats

Shrinking population

Decades of negative, albeit relatively flat population growth in both Cattaraugus County and the Western NY region remain a challenge for local municipalities and employers. Attracting and retaining residents will require a robust marketing effort touting County's assets/strengths.

Aging population and workforce due to younger people moving away

The aging of Cattaraugus County's population and workforce is due to younger residents moving away and not returning, as well as lack of in-migration of a younger workforce. This challenge stems largely from the dearth of job opportunities desirable to a younger, educated population.

Onerous state regulations, costing the County jobs and investment

Some businesses have decided to either move from or not to locate in Cattaraugus County due to onerous state regulations - costing the County jobs and investment.

Loss of manufacturing jobs

Manufacturing is Cattaraugus County's top sector that has decreased the most over the past two decades. The loss of these jobs has caused manufacturing workers to leave the County in search of employment. The ability of this sector to leverage economic development will depend on whether local firms can find skilled labor and remain globally competitive, incorporating new technologies and a growing market base.

Lack of workers with soft skills

County employers report challenges in finding workers with adequate soft skills - general resourcefulness and interpersonal strengths needed for training and growth as employees. Some local employers indicated their need for a "skillful rather than skilled" workforce.

Lack of succession among local businesses

Although a relatively new western New York farm business succession program has just gotten underway in Cattaraugus County, there is a general lack of succession planning among the County's smaller local businesses. Since "small businesses help big businesses thrive," and many local business owners are at or nearing retirement age, succession planning should be prioritized.

Poor coordination and/or communication between Seneca Nation and the County

The cooperative relationship between the Seneca Nation (which principally covers the city of Salamanca) and Cattaraugus County appears somewhat strained. Thus, the reestablishment of a cordial working relationship will be critical to optimizing the County's economic development potential over the long term.

Climate change impacting weather-related tourism opportunities

As weather patterns continue to change as a result of global warming, tourism-related businesses such as Ellicottville's Holiday Valley Resort may be negatively impacted.

SOCIO-ECONOMIC ANALYSIS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Key Findings: Socio-Economic Analysis

Decades of negative population growth

In contrast to New York State and the nation, both Cattaraugus County and the Western NY region have experienced negative, albeit relatively flat population growth for decades (changing by between -0.1 and -0.6 percent per year since 1980). According to the Southern Tier West Region's 2020 Comprehensive Economic Development Strategy (CEDS), the region's population decline is partially due to residents leaving in search of employment elsewhere.

Younger workforce will need proper training to replace retiring workers

The shifting and aging of the region's population and workforce through 2026 will likely create new housing and job opportunities for younger residents as the region's older workforce downsizes and retires. Given the County's relatively low levels of educational attainment, efforts must be made to properly train the younger workforce to replace the region's aging workforce (in manufacturing and trades sector, computer skills, advanced manufacturing/STEM, and soft skills).

Little real income growth

After adjusting for inflation, the County's adjusted median household income has been relatively flat over the past three decades. For example, in 2019, the County's median household income was \$50,780, compared to real median income of \$50,758 in 1989, after adjusting for inflation.

Methodology: Socio-Economic Analysis

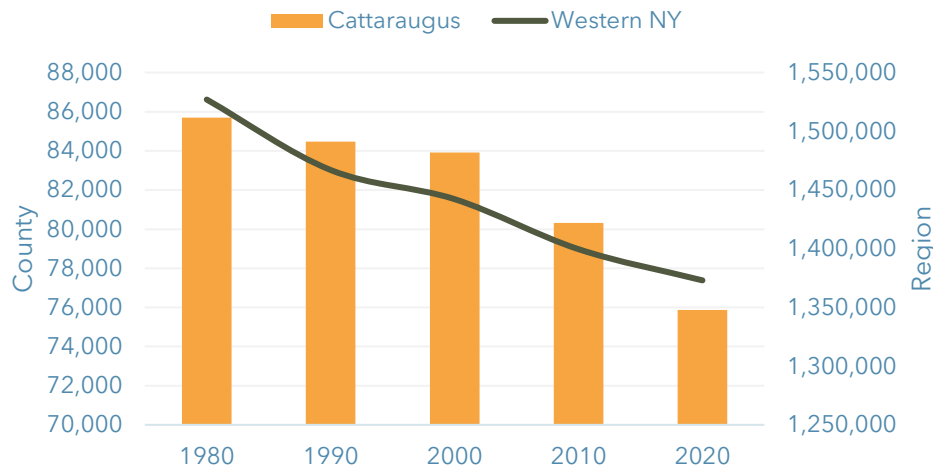
Utilizing a combination of published government data (U.S. Census, Bureau of Labor Statistics, and New York State's Research and Statistics Division within the Department of Labor) and proprietary analysis software (Esri Community Analyst), 4ward Planning analyzed demographic trends for Cattaraugus County, the Western New York Labor Market Region or LMR (includes Allegany, Cattaraugus, Chautauqua, Erie, and Niagara Counties) and New York State. Specifically, demographic trends associated with population, households, age cohorts, educational attainment, income distribution, unemployment, poverty rates, housing tenure, and consumer expenditure estimates were analyzed. Demographic data is displayed for 2010, 2021 (estimated), and 2026 (projected).

Other socio-economic data in this report is based on current-year estimates and five-year projection data provided by Esri. Released in June 2021, Esri adjusted socio-economic projections due to the pandemic, where appropriate (e.g., adjusting household formation, household income, housing tenure, and consumer expenditures, in particular), as these variables are prone to change abruptly following a significant economic shock. Although impacts may take years to transpire, the pandemic is likely to have long-term socio-economic impacts due to shifts such as births, deaths, and migration.

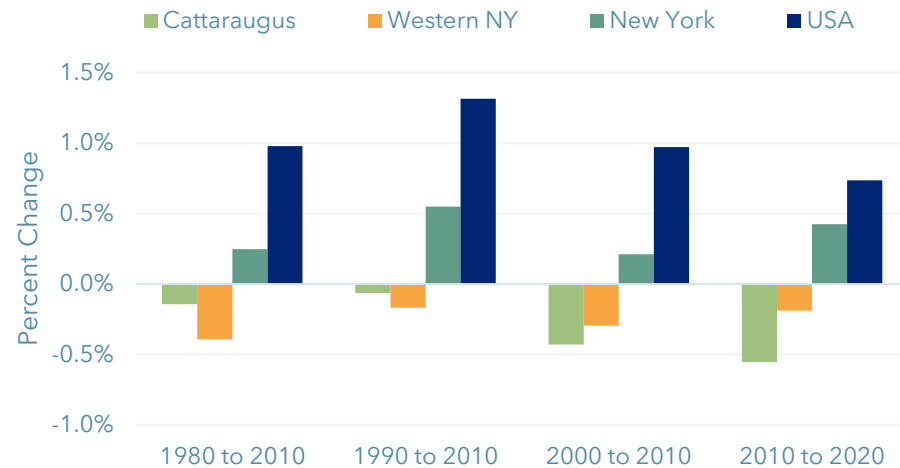
Historical Population Trends

According to historical population data provided by the U.S. Census Bureau, in contrast to New York State and the nation, both Cattaraugus County and the Western NY region have experienced negative, albeit relatively flat population growth since 1980 (changing by between -0.1 and -0.6 percent per year). As with other “rust belt” areas, population decline in the Western New York region has been evident for decades. However, declining population by itself does not necessarily mean a future of depressed economic activity.

Population Trends



Percent Annualized Population Change



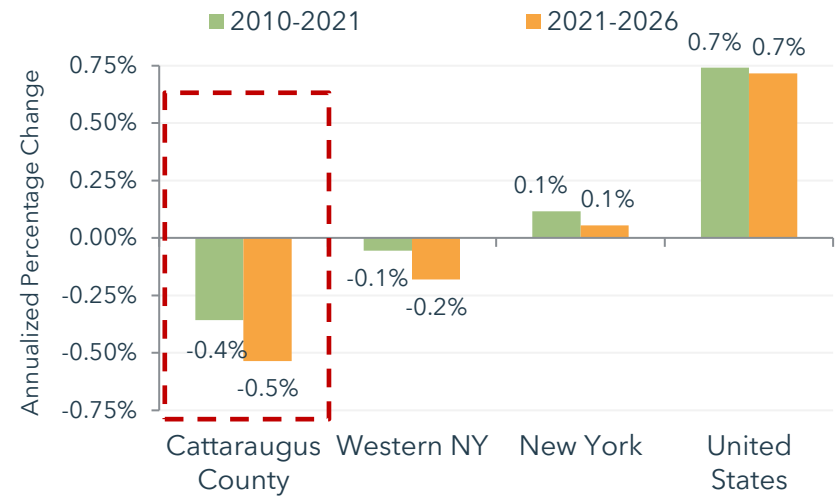
Strong Positive Growth	Greater than	1.50%		annually
Modest Positive Growth	Between	1.50%	and 0.75%	annually
Flat Growth	Between	0.75%	and -0.75%	annually
Modest Negative Growth	Between	-0.75%	and -1.50%	annually
Strong Negative Growth	Less than	-1.50%		annually

Source: U.S. Census Bureau (www.statsamerica.org)

Near-Term Population Change

Cattaraugus County is expected to continue experiencing relatively flat but slightly negative population growth through 2026 (changing by a minus 0.5 percent per year), with total population within the County projected to decrease by approximately 2,070 residents over the next five years. Total population within the Western NY region is expected to decrease by approximately 12,620 residents over the next five years.

Annualized Percentage Change, Total Population



Population by Geography

	2000	2010	2021	2026	Net Change (2021-2026)
Cattaraugus County	83,955	80,317	77,158	75,093	-2,065
Western NY	1,443,743	1,399,677	1,391,165	1,378,546	-12,619
New York	18,976,457	19,378,102	19,625,500	19,678,859	53,359
United States	281,421,906	308,745,538	333,934,112	345,887,495	11,953,383

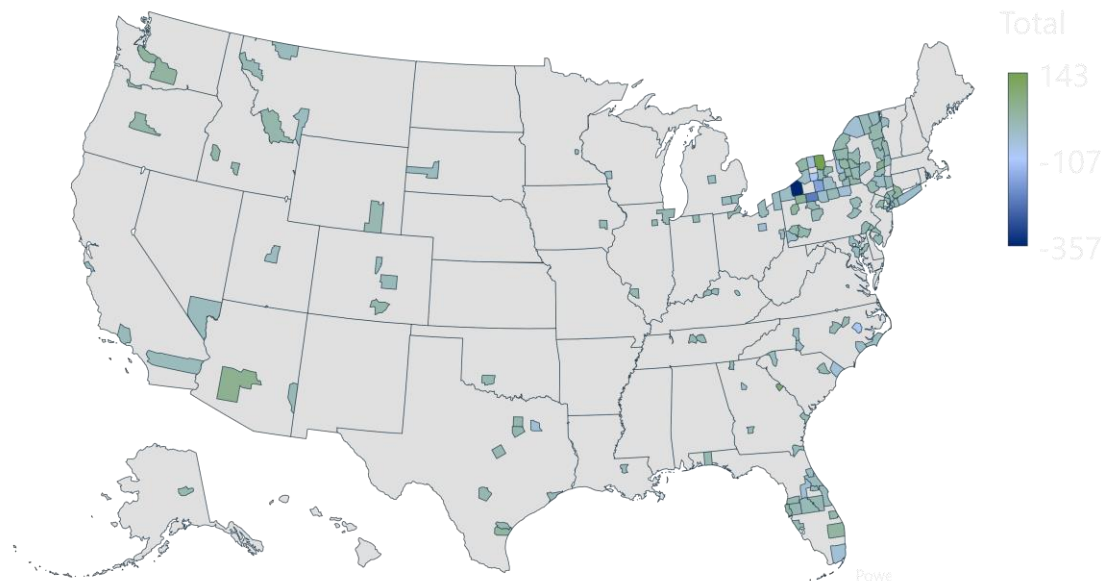
Source: US Census Bureau; Esri; 4ward Planning Inc., 2021

Intercounty Migration: Cattaraugus County

According to the Southern Tier West Region’s 2020 Comprehensive Economic Development Strategy (CEDS), the region’s population decline is partially due to residents leaving in search of employment elsewhere. The loss of manufacturing jobs is also causing skilled manufacturing workers and even lower skilled workers to leave. As illustrated in the map and table below, from 2014 to 2018, the largest inflow of residents moving to Cattaraugus County (143 persons) moved from Monroe County. Conversely, the largest outflow of residents leaving Cattaraugus County (357 persons) moved to neighboring Chautauqua County. Since the Covid-19 pandemic is still unfolding, it is difficult to assess its impacts on mobility. Working from home is likely at record-high levels right now, and if even a portion of this shift proves to be permanent, it could mean fewer people moving for job-related reasons, as well.

Inter-County Movers: Cattaraugus County 2014-2018

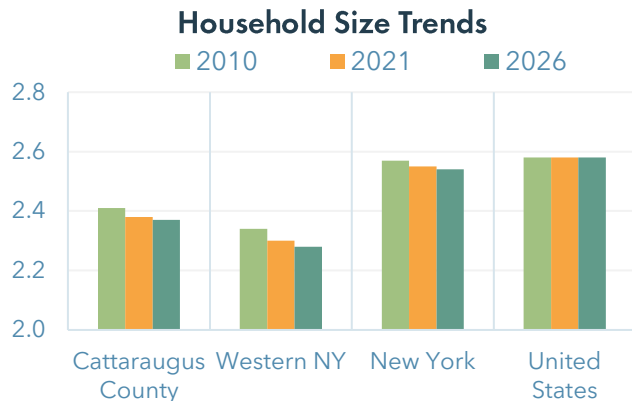
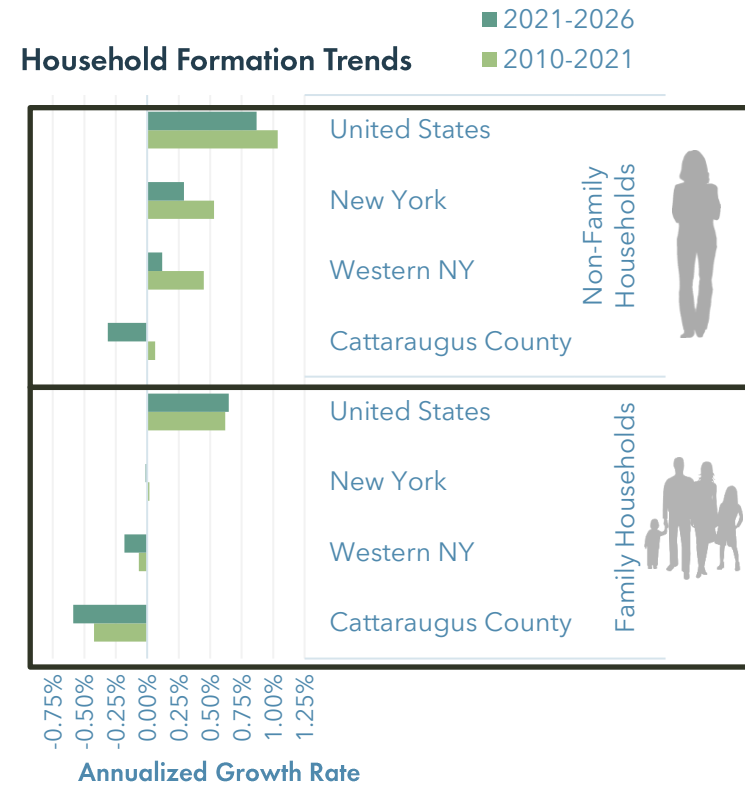
County	State	Persons
Top Net Positive (Inflow)		
1 Monroe County	New York	143
2 Columbia County	Georgia	97
3 Albany County	New York	53
4 Maricopa County	Arizona	49
Top Net Negative (Outflow)		
1 Chautauqua County	New York	(357)
2 McKean County	New York	(223)
3 Allegany County	New York	(168)
4 Doña Ana	New Mexico	(119)



Source: U.S. Census Bureau, Census Flow Mapper; 4ward Planning Inc., 2021

Household Formation

As illustrated in the table below, from 2021 to 2026, the County is projected to experience negative, albeit relatively flat, household growth (changing by -0.5 percent per year or by 760 households). As illustrated in the chart to the right, non-family household formation in the County (top right) is projected decrease at a slightly slower rate than family households (bottom right). As illustrated below, average household size has also been decreasing slightly in recent years but is expected to remain relatively flat over the next five years, at just under 2.4 persons per household. **The relatively small household size of less than 2.5 persons also suggests there may be increasing demand for small housing units (e.g., high quality rental apartments).**



Households by Geography

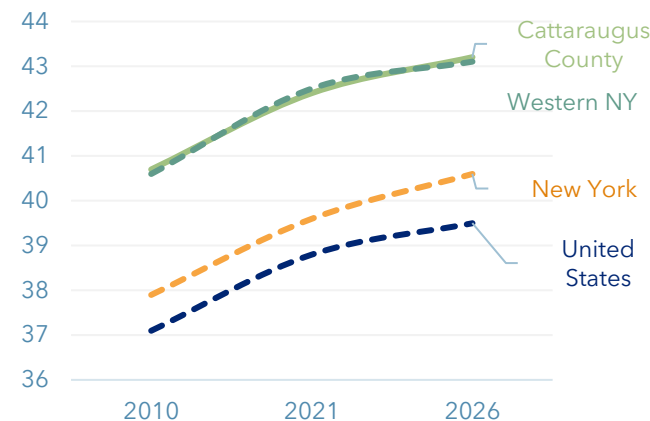
	2000	2010	2021	2026	Net Change (2021-2026)
Cattaraugus County	32,023	32,263	31,387	30,625	-762
Western NY	573,266	578,435	586,933	585,154	-1,779
New York	7,056,860	7,317,755	7,482,516	7,520,525	38,009
United States	105,480,101	116,716,292	126,470,675	131,047,364	4,576,689

Source: US Census Bureau; Esri; 4ward Planning Inc., 2021

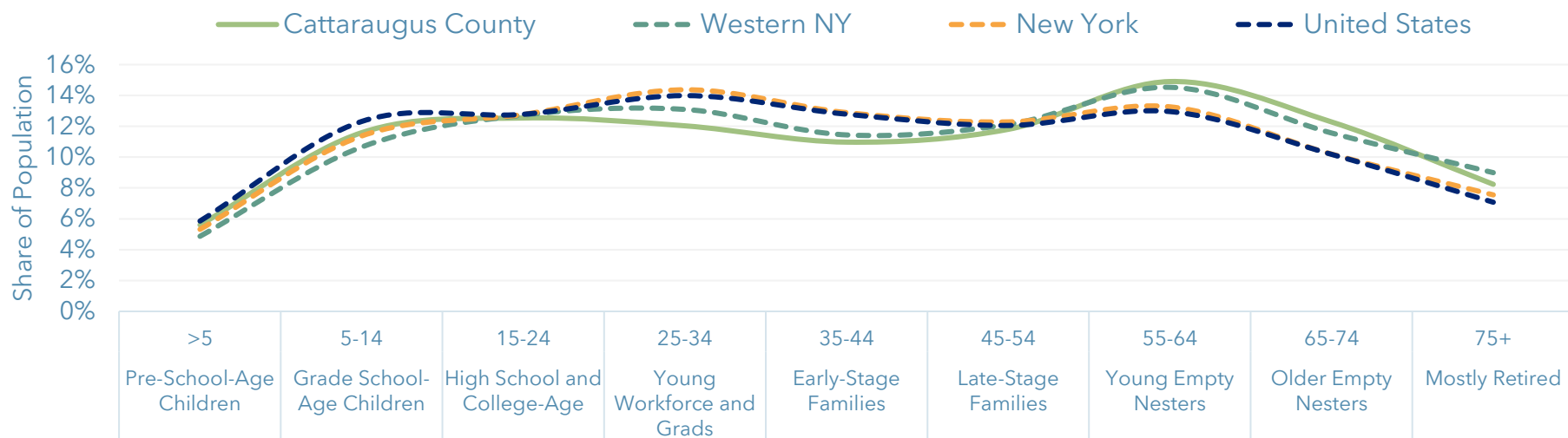
Age Distribution

As illustrated in the chart to the right, the median age in Cattaraugus County (42 years) is comparable to that in the region but higher than that within New York (40 years). Although the median age in all geographies is expected to increase through 2026, the County's median age will remain higher than that within the State. As illustrated below, Cattaraugus County has a slightly lower share of persons representing young workforce and grads (ages 25 to 34 years) compared to the other geographies. This poses a challenge for long-term regional economic vitality.

Median Age Trends



Age Distribution, 2021

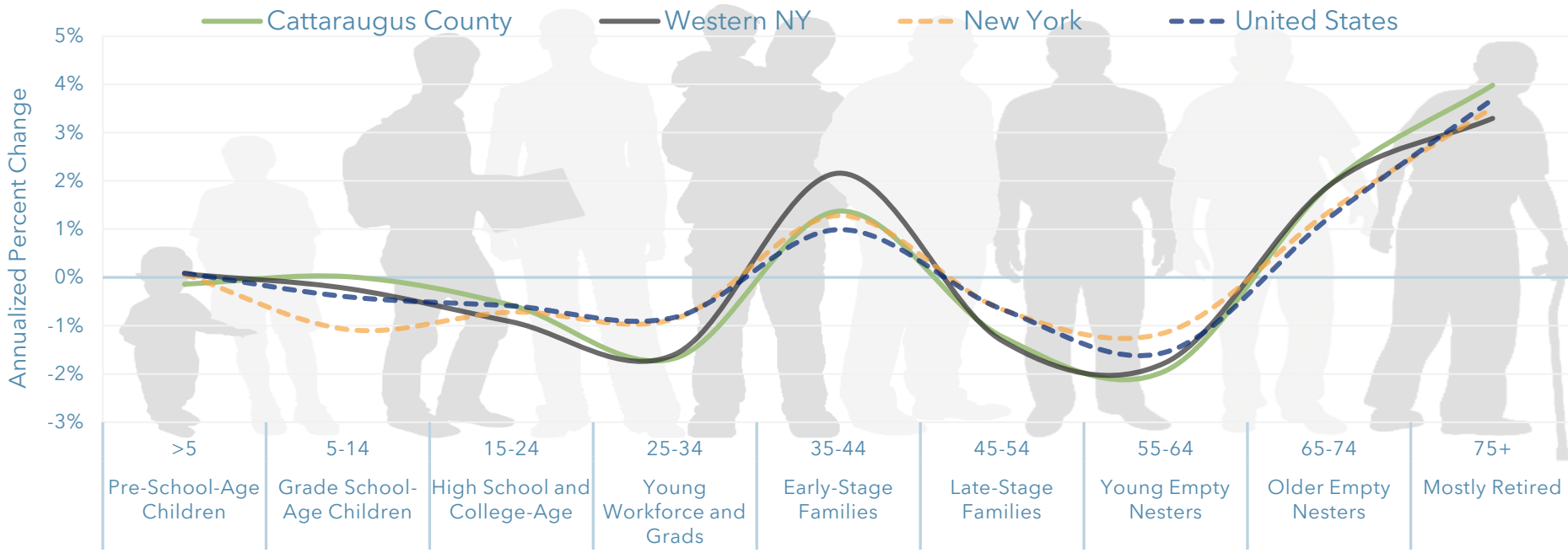


Source: Esri; 4ward Planning Inc., 2021

Age Cohort Growth Patterns

All regions are expected to experience the fastest population growth among adults over age 65, the age cohort composed of mostly retired individuals. Compared to the region, the County is expected to experience slightly less population growth among adults ages 35 to 44, the age cohort representing early-stage families. **Younger workers are crucial to sustaining service, construction and manufacturing businesses and as this population dwindles, County area employers will be challenged to either raise wages or increase automation, where possible.**

Annualized Age Distribution Change, 2020-2025

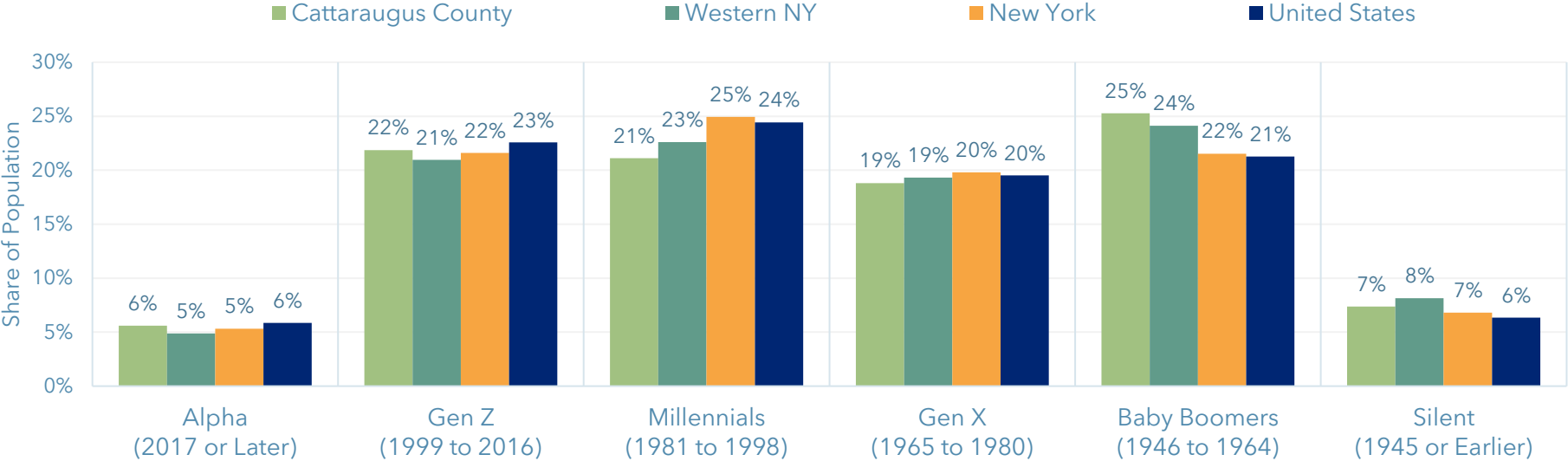


Source: US Census Bureau; Esri; 4ward Planning Inc., 2021

Population Share by Generation

The chart below illustrates the share of population by selected generations across all geographies. Cattaraugus County currently has a slightly higher share of baby boomers compared to the nation (25 and 21 percent, respectively), while it has a slightly lower share of millennials (21 and 24 percent, respectively). The combined share of Gen Z and millennial residents (representing the current demand driver for workforce housing) comprises 43 percent of the County’s population.

Age Distribution by Generation, 2021



Sources: U.S. Census Bureau; Esri; 4ward Planning Inc., 2021

Generation Trends

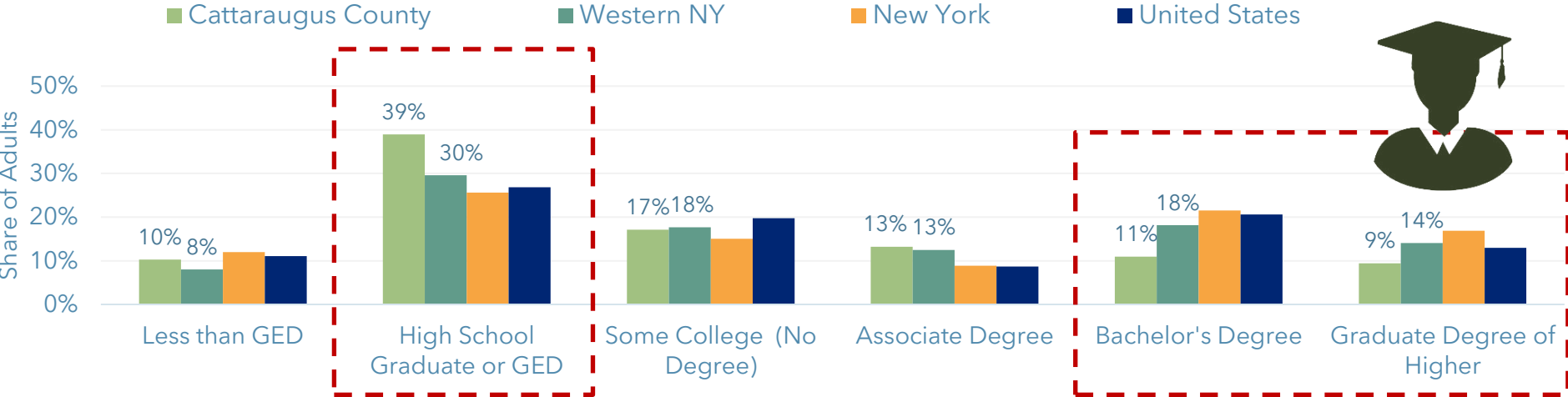
Research shows that each generation can exhibit distinct priorities and attitudes, goals, lifestyle choices, and purchasing behaviors. Understanding shifting purchasing behaviors and preferences is important for predicting changing housing and retail demand.

- **Baby boomers** (those born between 1946 and 1964), the principal driving force of the modern retail shopping center, are now 56 years of age and older (the vast majority of whom are in or approaching retirement). Baby boomers no longer represent the critical demand once relied upon by shopping centers, as they are well beyond the age of raising children, needing to buy new clothes for work, or making major furniture and/or housing-related purchases associated with the purchase or rental of a new home.
- **Generation X** (those born between 1965 and 1980) is that following the baby boom generation. While Gen X is comparatively younger and still making purchases associated with family rearing, employment, and new or renovated housing, it is a much smaller generation and never exhibited the same strong consumer spending might of boomers and were, thus, less impactful on the bottom lines of retailers.
- **Millennials** (those born between 1981 and 1998) came of age during the Great Recession and the advent of the Internet and have changed the retail consumer landscape. They do not exhibit the same zest for material goods as their parents or grandparents, and value experiences over purchases. Access to an online world of goods, which can be purchased at lower prices than those found in brick-and-mortar stores, has made the avoidance of visiting shopping centers easy and often preferable to the millennial generation.
- **Generation Z** (those born between 1999 and 2016) is the generation that was in line to inherit a strong economy with record low unemployment, but now peers into an uncertain future, as Covid-19 has reshaped the country's social, political, and economic landscape. This generation is more racially and ethnically diverse than any previous generation and is on track to be the most well-educated generation yet.

Educational Attainment

As illustrated in the chart below, the level of educational attainment in Cattaraugus County is lower than that in the larger region. For example, the share of adult County residents 25 and older holding a bachelor’s degree or higher level of education is lower than that in the Western NY region (20 and 32 percent, respectively), while the share of residents in the County holding a high school degree or lower level of education is higher than that in the region (39 and 30 percent, respectively). The relatively low educational attainment level in the County reflects the fact that the vast majority of occupations in the County do not require a four-year degree. **Notwithstanding this fact, quite a number of these occupations, within the manufacturing and skilled trades industries, in particular, offer solid living wage careers.**

Educational Attainment by Geography, 2021

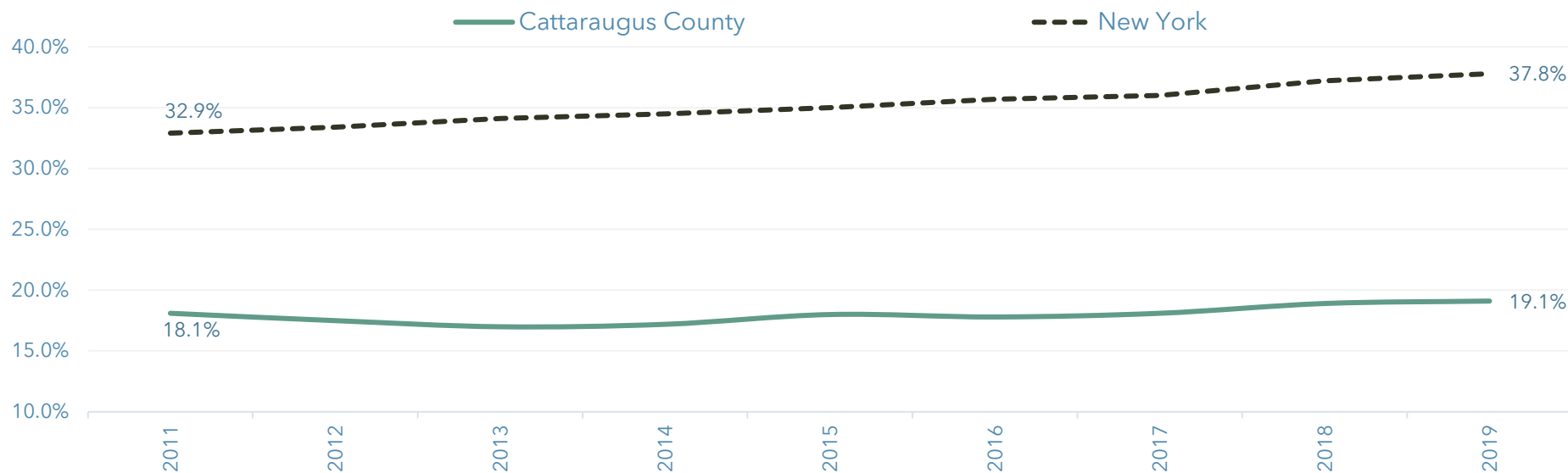


Source: Esri; 4ward Planning Inc., 2021

Educational Attainment Trends

The chart below presents recent trend data for the share of adults (here 18 years and older) whose highest degree was a bachelor's, master's, or professional or doctorate degree. While the share of adults holding a bachelor's degree or higher in the State increased by 4.9 points from 2011 to 2019, the share in the County has increased by just 1.0 point over the same period. The relatively low share of County residents holding a bachelor's degree or higher will likely deter employers requiring a highly educated workforce. However, certain high-wage industries (manufacturing and construction, specifically) do not rely on college educated workers and, thus, these industries need to receive the highest attention by the County.

Adult Population with Bachelor's Degree or Higher

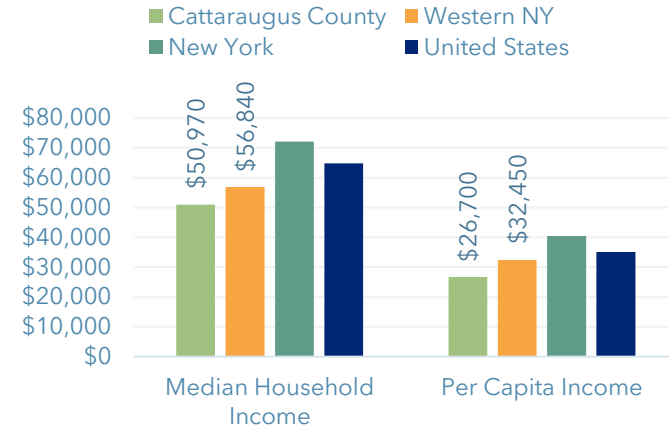


U.S. Census Bureau, Bachelor's Degree or Higher, retrieved from FRED, Federal Reserve Bank of St. Louis, September 8, 2021

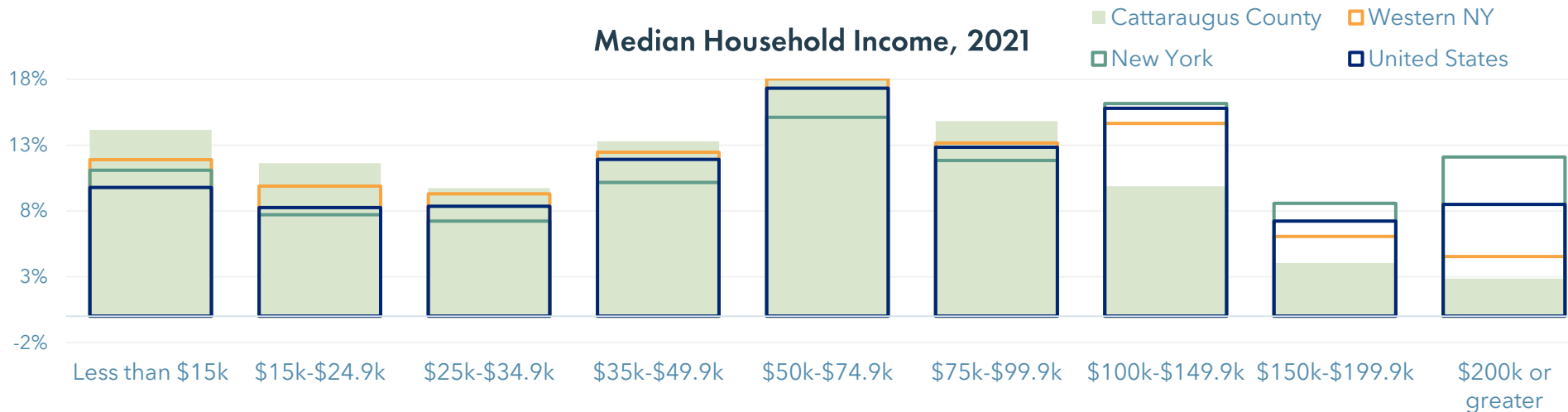
Median Household Income

Typically, educational attainment is correlated with earnings, as households and persons with higher levels of education often command higher incomes. Given Cattaraugus County's lower levels of educational attainment, it is not surprising that its median household income is lower than that of the region. As shown in the chart to the right, in 2020, the County had a median household income of approximately \$50,970 and a per capita income of \$26,700, compared to the region's \$56,840 and \$32,450, respectively. As illustrated below, compared to the region, the County has lower shares of higher-income households (i.e., with median household incomes above \$100,000).

Households and Per Capita Income, 2021



Median Household Income, 2021

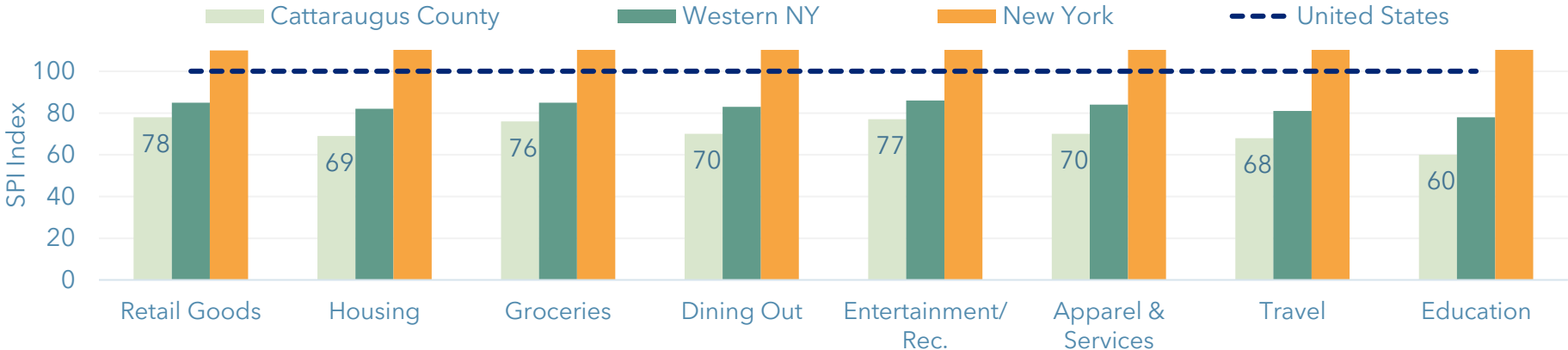


Sources: US Census Bureau; Esri; 4ward Planning Inc., 2021

Household Expenditures

Esri combines the latest Consumer Expenditure Surveys from the Bureau of Labor Statistics (BLS) to estimate a current Spending Potential Index (SPI). The SPI compares the average amount spent locally for a product to the average amount spent nationally. An index of 100 reflects the average, while an SPI of 70 means the area spends 30 percent less than the national average on that good or service. As shown in the chart below, in 2020, average household expenditures within Cattaraugus County and the Western NY region are relatively low compared to the State’s average household expenditures on a range of goods and services. Household expenditures in the County are reflective of lower levels of educational attainment and median household incomes. **However, the relatively lower spending metrics in the County should be acknowledged as the lower cost of living (housing, in particular) offered by the County, which will increasingly become a pull for households seeking to economize on their annual living expenses.**

Household Expenditure Index by Geography, 2021

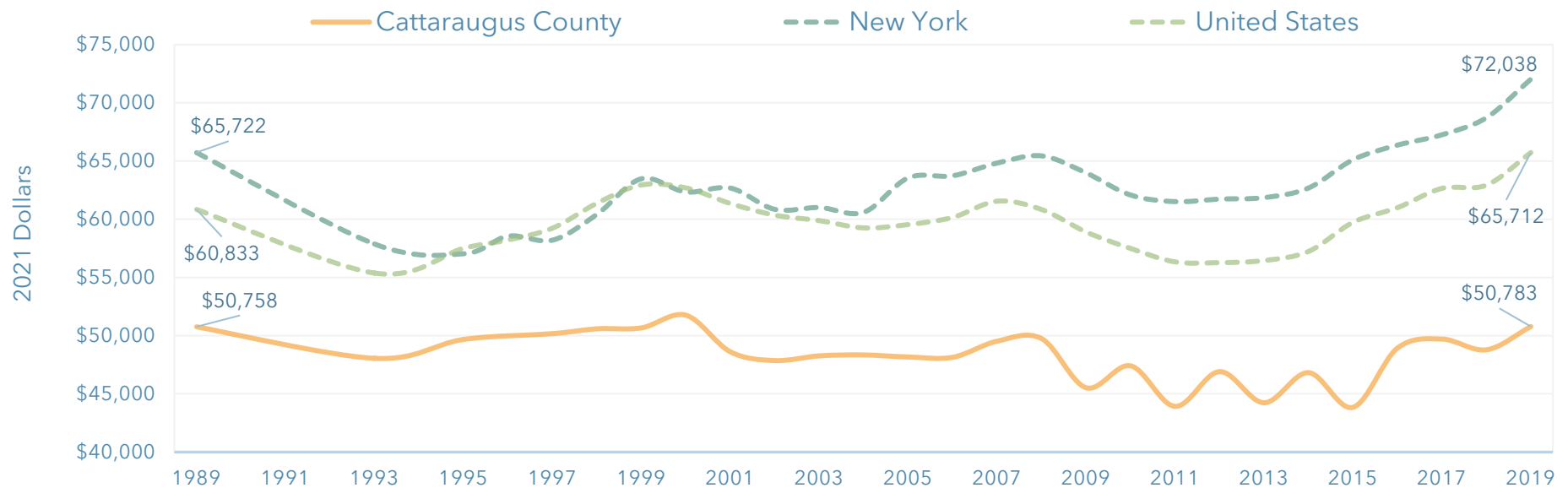


Source: Esri; 4ward Planning Inc., 2021

Median Household Income Trends

As illustrated below, the County’s median household income (not seasonally adjusted) has historically been lower than those within the State and nation. After adjusting for inflation, the median household income in the County has been relatively flat over the past three decades. For example, in 2019, the median household income in the County was \$50,780, compared to \$50,758 in 1989, an increase of just \$25 dollars after adjusting for inflation.

Adjusted Median Household Income Trends (2019 Dollars)

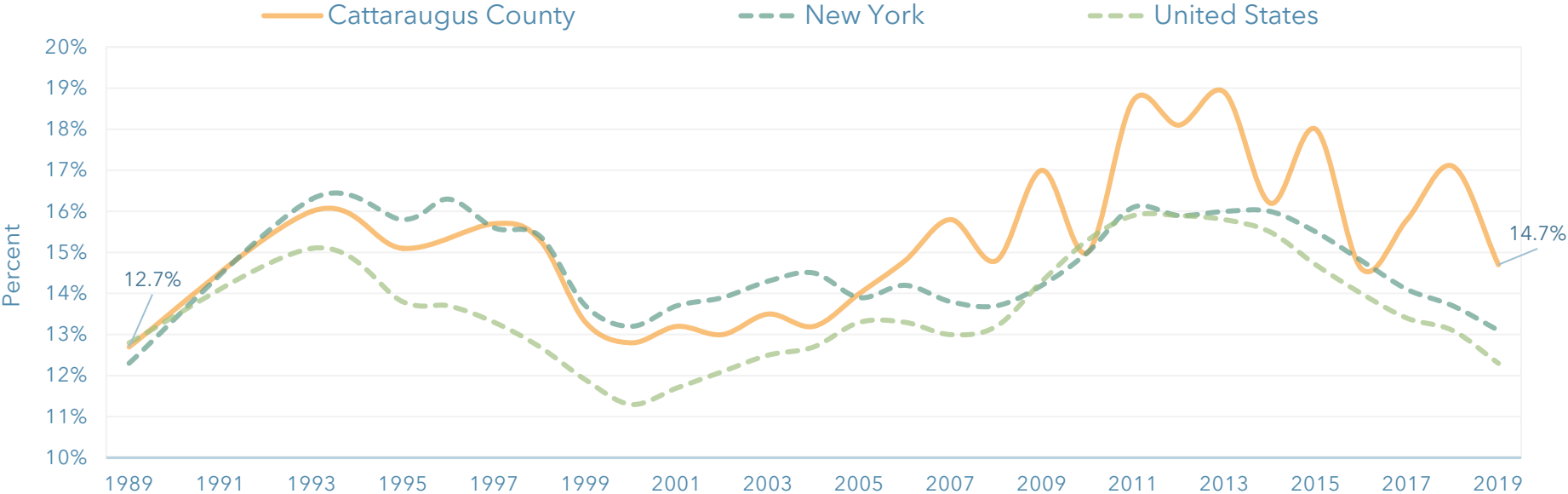


Sources: U.S. Census Bureau, Estimate of Median Household Income for Cattaraugus County, NY [MHINY36009A052NCEN], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/MHINY36009A052NCEN>, September 13, 2021. CPI for All Urban Consumers

Poverty Rate Trends

The U.S. Census models income and poverty estimates by combining survey data with population estimates and administrative records. As illustrated below, since 2005, the share of County residents living in poverty has been higher, generally, than those within the State and nation. In 2019, 14.7 percent of County residents were living in poverty, compared to just 12.7 percent in 1989. The County is likely also experiencing increasingly high public assistance and income assistance burdens. **A portion of the elevated poverty rate is likely due to older seniors who are making do on limited incomes.**

Estimated Percent of People of All Ages in Poverty

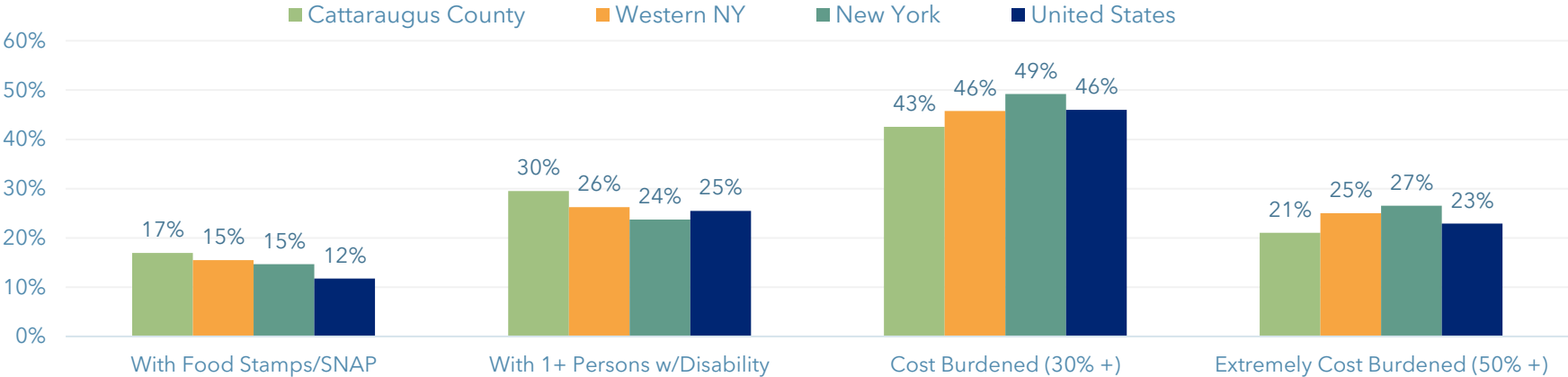


Sources: U.S. Census Bureau, Estimated Percent of People of All Ages in Poverty for Cattaraugus County, NY [PPAANY36009A156NCEN], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/PPAANY36009A156NCEN>, September 14, 2021

Vulnerable Households

According to 2019 American Community Survey data provided by Esri, 17 percent of County residents receive nutrition assistance via food stamps/SNAP (Supplemental Nutrition Assistance Program) and 30 percent live with one or more people with a disability. The U.S. Housing and Urban Development Department (HUD) states households that spend more than 30 percent of their incomes on housing are considered “cost-burdened” and may have difficulty affording necessities such as food, clothing, transportation, and medical care. In 2019, approximately 43 percent of the County’s renter households pay more than 30 percent of their monthly household incomes on rent. **While the share of County households receiving nutrition assistance and living with one or more persons with a disability are higher than those of the region and State, the share of cost-burdened renter households is slightly lower - perhaps due to more affordable rental housing options in the County.**

Share of Vulnerable Households by Geography, 2019



Sources: US Census Bureau; Esri; 4ward Planning Inc., 2021

TOURISM INFRASTRUCTURE & TRENDS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Key Findings: Tourism Infrastructure & Trends

Over 100 different tourism attractions

Based on data provided by Cattaraugus County, there are over 100 different tourism attractions in the County. Some of the County's major tourism destinations include Holiday Valley (a public ski resort), Holimont (a private ski resort), Allegany State Park, the Amish Trail, the Griffis Sculpture Park, Pumpkinville, the Seneca Allegany Casino, and the Seneca Iroquois Museum.

Range of tourism accommodations

Based on data provided by Cattaraugus County, there are over 60 different tourism accommodations in the County ranging from budget-friendly public campgrounds to high-end resorts. For example, the Seneca Allegany Resort and Casino offers 413 luxurious hotel rooms, while many of the public campgrounds offer affordable accommodation options.

\$240 million in direct tourism spending

In 2019, the \$240 million in direct tourism spending in Cattaraugus County supported approximately 4,980 jobs, which generated \$68 million in direct labor income and \$112 million including indirect and induced impacts. Within the Southern Tier West region, Cattaraugus County is the county most dependent upon tourism, with 9.7 percent of all labor income generated by visitors and 17 percent of all employment sustained by visitors.

Methodology: Tourism Infrastructure and Trends

4ward Planning performed primary and third-party research concerning existing tourism assets located within Cattaraugus County, inclusive of tourism accommodations (e.g., campgrounds, hotels and motels, cabins and cottages, bed and breakfasts, vacation rentals, and resorts) and attractions (e.g., museums, family entertainment, boating areas, equestrian facilities, parks, golf courses, visitor centers, bowling, gaming, theaters, and lakes). Inventoried sites were mapped and summarized accordingly.

Additionally, we conducted interviews with those knowledgeable of the County's cultural and heritage tourism opportunities, inclusive of chamber of commerce and tourism representatives, and representatives from the regional lodging industry. This analysis seeks to understand the current opportunities and challenges associated with expanding the County's cultural and heritage tourism industry and documents these in this task.

Tourism Activities

The table to the right illustrates the range of recreational, cultural, and entertainment activities promoted in Cattaraugus County. While some are available year-round, most activities are seasonal. Many winter activities are located in Ellicottville, known as the "Aspen of the East" and home to two ski resorts and a tubing park. Salamanca is the gateway to Allegany State Park, the largest state park in New York State. New York's Amish Trail is located in the County's western portion. County attractions are mapped on the following pages.

	Type	Autumn	Spring	Summer	Winter
Bicycling	Recreation	X	X	X	
Canoeing, Kayaking & Paddle Boarding	Recreation	X	X	X	
Fishing	Recreation	X	X	X	X
Galleries & Museums	Cultural	X	X	X	X
Hiking	Recreation	X	X	X	X
Skiing Down Hill	Recreation				X
Sky Flyer Mountain Coaster	Recreation	X	X	X	
Sky High Adventure Park	Recreation	X	X	X	
Sky High Climbing Forest	Recreation	X	X	X	
Snow Tubing	Recreation				X
Snowboarding	Recreation				X
Snowmobiling	Recreation				X
Snowshoeing	Recreation				X
Whitewater Rafting	Recreation	X	X	X	X
Amish Trail & Country Tour	Cultural	X	X	X	
Batting Cages	Recreation	X	X	X	
Boating	Recreation	X	X	X	
Bowling	Recreation	X	X	X	X
Camping	Recreation	X	X	X	X
Cross Country Skiing	Recreation				X
Gaming	Entertainment	X	X	X	X
Golfing	Recreation	X	X	X	
Griffis Sculpture Park	Cultural	X	X	X	
Horseback Riding	Recreation	X	X	X	X
Hunting	Recreation	X	X		X
Motor Sports	Recreation	X	X	X	
Motorcycling	Recreation	X	X	X	
Mountain Biking	Recreation	X	X	X	
Roller Skating & Rollerblading	Recreation	X	X	X	

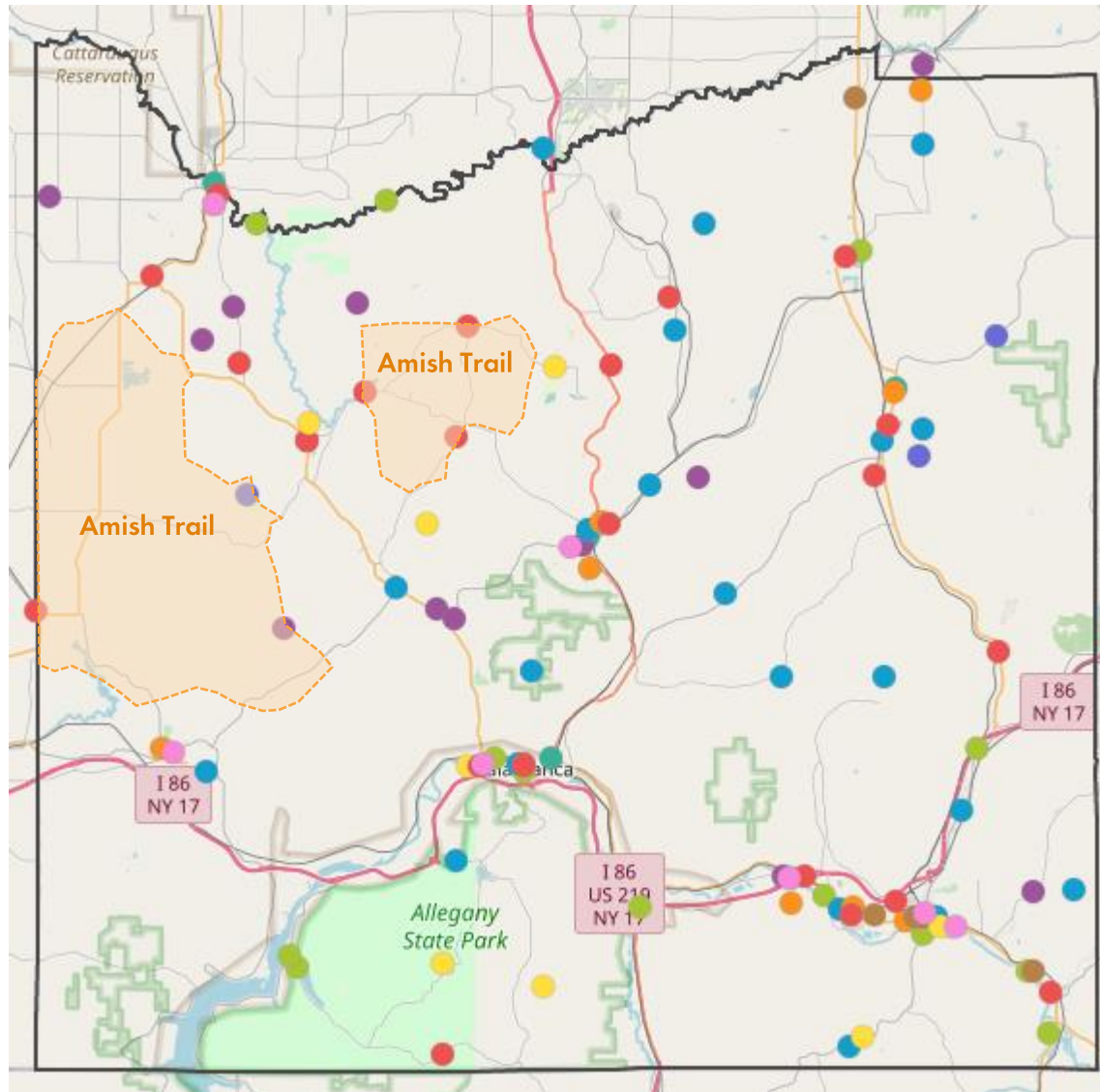
Source: <https://enchantedmountains.com>

Tourism Attractions

Based on data provided by Cattaraugus County, illustrated to the right and summarized below, there are over 100 different tourism attractions in the County. Holiday Valley (a public ski resort), Holimont (a private ski resort), Allegany State Park, the Amish Trail, Griffis Sculpture Park, Pumpkinville, the Seneca Allegany Casino, and the Seneca Iroquois Museum are some of the major tourism destinations.

	Attraction Type	Number
■	Museums	26
■	Family Entertainment	21
■	Boating	14
■	Equestrian Facilities	12
■	Parks	8
■	Golf Course	8
■	Visitor Centers	7
■	Bowling	4
■	Gaming	1
■	Theaters	5
■	Lakes	3
	Total	109

Source: Cattaraugus County, 4ward Planning Inc., 2021.



Major Tourism Attractions

The graphics below present the top tourism attractions in Cattaraugus County.



**Holiday Valley
Ski Resort**



Holimont



Allegany State Park



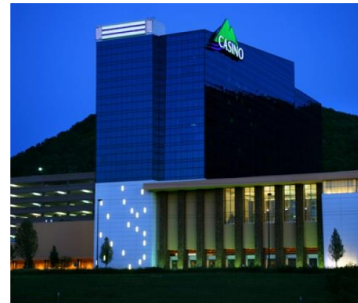
Amish Trail



Griffis Sculpture Park



Pumpkinville



**Seneca Allegany
Casino**

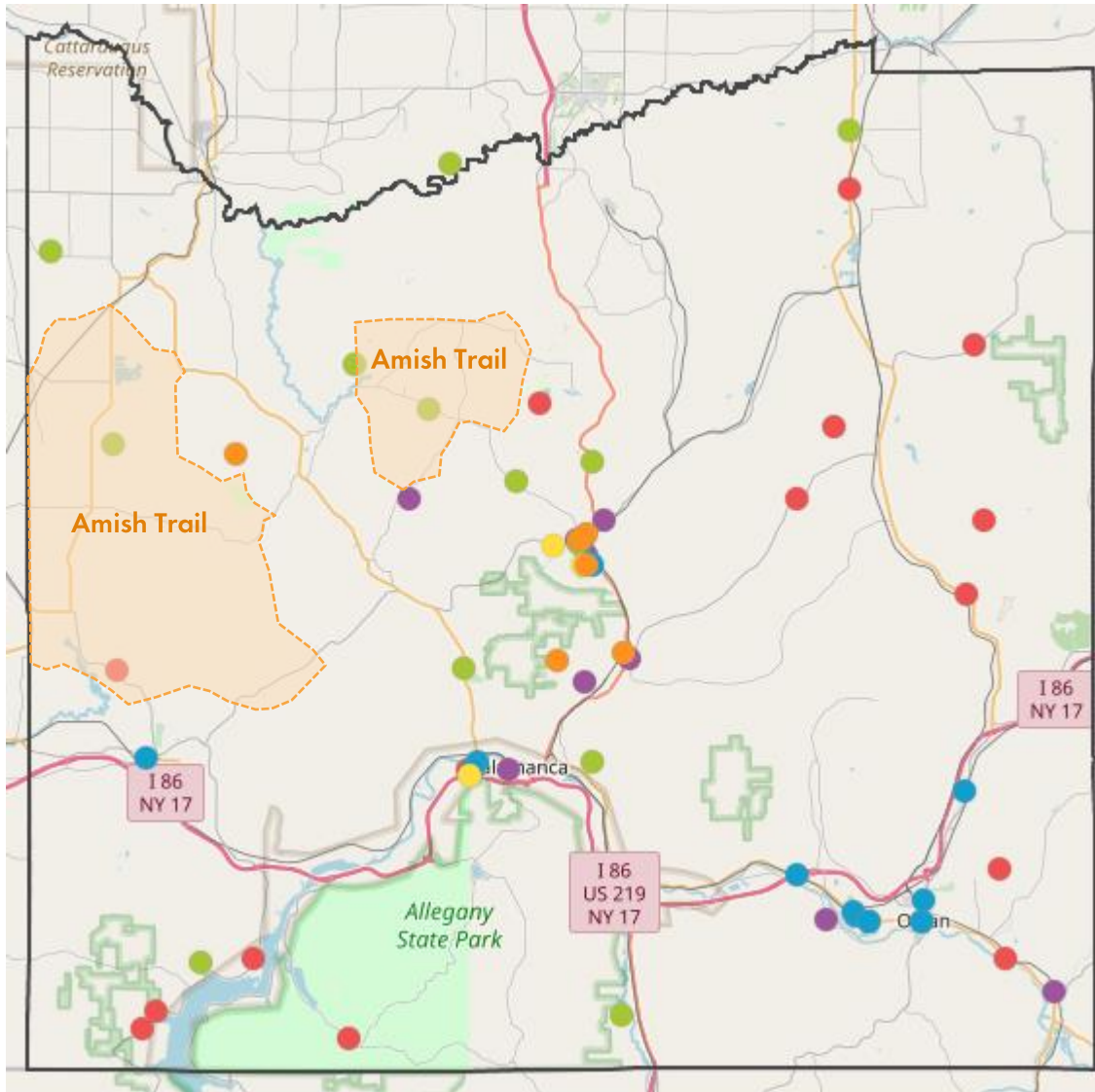


**Seneca Iroquois
Museum**

Tourism Accommodations

Based on data provided by Cattaraugus County, illustrated to the right and summarized below, there are over 60 different tourism accommodations in the County, ranging from budget-friendly public campgrounds to high-end resorts. For example, the Seneca Allegany Resort and Casino offers 413 luxurious hotel rooms, while many of the public campgrounds offer affordable accommodations options.

	Accommodation Type	Number
■	Campgrounds	15
■	Hotels & Motels	14
■	Cabins & Cottages	13
■	Bed & Breakfast	10
■	Vacation Rentals	7
■	Resorts	3
	Grand Total	62

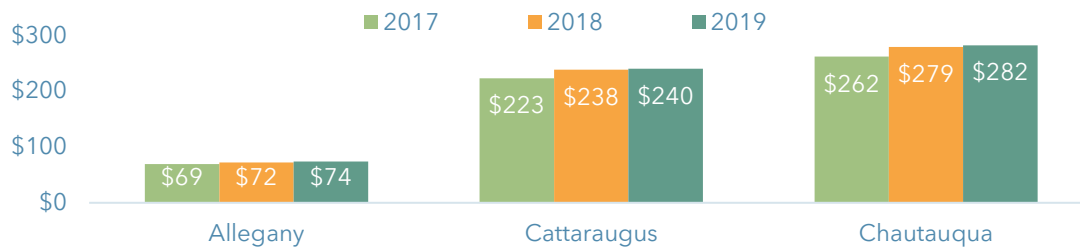


Source: Cattaraugus County, 4ward Planning Inc., 2021.

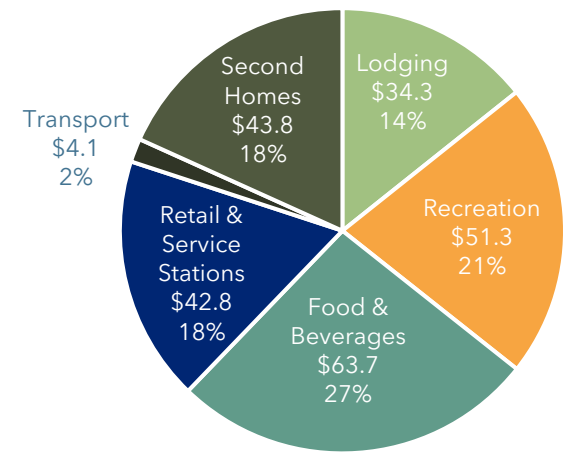
Tourism Spending: Southern Tier West

According to a Tourism Economics report, in 2019, travelers spent \$240 million in Cattaraugus County, across a diverse range of sectors (compared to \$223 million in 2017). Spending on food & beverages and recreation comprised 27 and 21 percent of total spending, respectively. Seasonal second homes also generate significant economic activity in the region, tallying \$44 million.

Total Traveler Spending Trends



Traveler Spending by Category (Millions): Cattaraugus County



Traveler Spending by Category (Millions)

	Lodging	Recreation	Food & Beverages	Retail & Service Stations	Transport	Second Homes	Total
Allegany	\$2.7	\$1.6	\$14.3	\$5.9	\$0.5	\$48.8	\$73.8
Cattaraugus	\$34.3	\$51.3	\$63.7	\$42.8	\$4.1	\$43.8	\$240.0
Chautauqua	\$82.3	\$6.1	\$61.0	\$41.4	\$48.0	\$43.5	\$282.4
Total	\$119.3	\$59.0	\$139.0	\$90.1	\$52.6	\$136.2	\$596.2

Source: Tourism Economics. Economic Impact of Visitors in New York, Chautauqua-Allegany Focus, 2019

Tourism Economic Impact: Southern Tier West

According to the analysis conducted by Tourism Economics, in 2019, the \$240 million in direct tourism spending in Cattaraugus County supported approximately 4,980 jobs, which generated \$68 million in direct labor income and \$112 million including indirect and induced impacts. Within the Southern Tier West region, Cattaraugus County is the county most dependent upon tourism, with 9.7 percent of all labor income generated by visitors and 17 percent of all employment sustained by visitors. **Were it not for tourism-generated state and local taxes, the average household in Cattaraugus County would have to pay an additional \$912 to maintain the same level of government revenue.**

Tourism Economic Impact Summary

County	Direct Sales	Labor Income	Employment Persons	Local Taxes	State Taxes
Allegany	\$73.8	\$25.9	1,201	\$4.8	\$4.0
Cattaraugus	\$240.0	\$112.3	4,982	\$15.6	\$13.1
Chautauqua	\$282.4	\$136.8	5,194	\$20.4	\$15.4
Total	\$596.2	\$275.0	11,377	\$40.7	\$32.6

Detailed Tourism Economic Impact

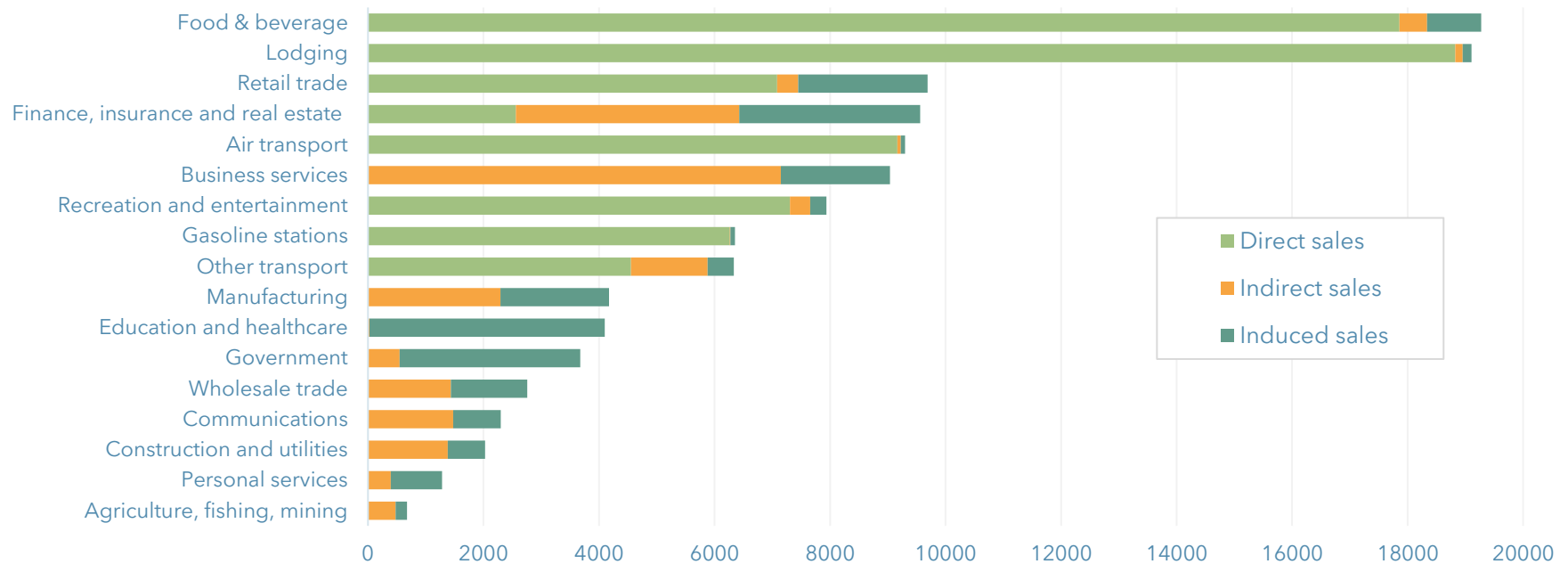
	Tourism Labor Income (Millions)			Employment Total			Tax Savings per Household
	Direct	Induced	Share (Total)	Direct	Induced	Share (Total)	
Allegany	\$15.7	\$25.9	4.9%	845	1,201	9.0%	\$488
Cattaraugus	\$68.0	\$112.3	9.7%	3,507	4,982	17.0%	\$912
Chautauqua	\$82.9	\$136.8	7.0%	3,656	5,194	10.7%	\$681
Total	\$166.6	\$275.0	7.6%	8,008	11,377	12.5%	\$718

Source: Tourism Economics. Economic Impact of Visitors in New York, Chautauqua-Allegany Focus, 2019

Tourism Spending: New York

According to a Tourism Economics report, visitors and tourism businesses spent \$73.6 billion in New York in 2019. This spending supported a total of nearly \$118 billion in business sales when indirect and induced impacts are considered. While the majority of sales occur in industries directly serving visitors (e.g., food and beverage stores, lodging, retail trade, recreation and entertainment, etc.), \$3.9 billion in business sales is occurring in finance, insurance, and real estate as a result of selling to tourism businesses.

Business Sales Impacts by Industry: New York (Millions)



Source: Tourism Economics. Economic Impact of Visitors in New York, Chautauqua-Allegany Focus, 2019

REAL ESTATE ANALYSIS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Methodology: Real Estate Market Trends Analysis

Our primary objective, here, is to gain an understanding of local supply, demand, occupancy, and pricing factors for existing land uses within Cattaraugus County, generally, and within Olean and Salamanca, in particular. This analysis examines residential, retail, office, and light industrial. Using a variety of primary and secondary resources, 4ward Planning examined real estate opportunities for each of the major land uses (residential, retail, office, and light industrial) and identified prospective opportunities and challenges for each land-use category.

Where data is available, we examined the following land-use metrics for residential (single-family, townhouses, condos, and flats), retail, office, and light industrial: vacancy and absorption rate trends, commercial lease rates, apartment rental rates, residential price points, and building permit activity. Quantitative analysis was supplemented with active broker and developer interviews to “ground truth” data findings and shed light on national and regional commercial and industrial space trends.

Residential

Key Findings: Residential

Relatively little new housing being constructed

Just six percent of all housing permitted in the Western NY region from 2006 to 2020 (29,051 units) was within Cattaraugus County (1,536 units), and approximately 92 percent of housing permitted in the County during this time is characteristic of single-family housing (1,410 units).

Lower cost of housing

Cattaraugus County's median housing value (\$93,700) is much lower than that within the State and nation. Compared to both geographies, the County has a much higher share of owner-occupied housing units valued between \$50,000 and \$99,000. Home values are greatest in central Cattaraugus County, north of Salamanca, where median home values are as high as \$184,064.

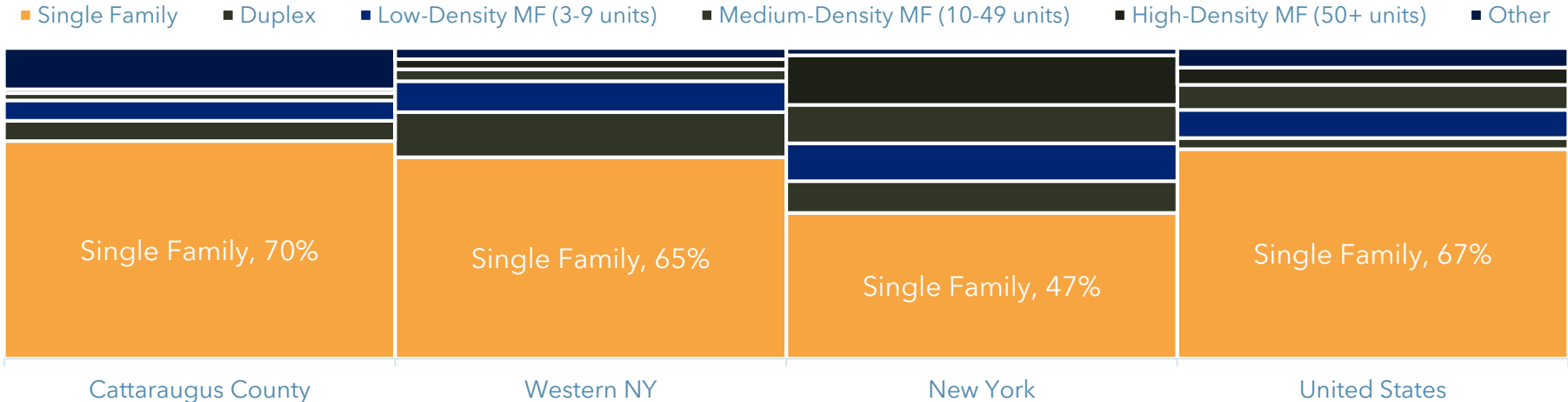
65% of vacant housing due to seasonal, recreational, or occasional use

Although the County's average housing vacancy rate is very high (20.8 percent in 2019), this rate includes seasonal and other vacant units. The number of "for seasonal, recreational, or occasional use" units (vacant units used only in certain seasons or other occasional use) in the County (5,670 units) represents a relatively large share (65 percent) of all vacant units in 2019.

Housing Choice: Unit Type and Bedroom Size

According to 2019 data provided by Esri, the housing stock in Cattaraugus County is slightly less diverse than that found in the Western NY region. For example, 70 percent of the County’s housing stock is characteristic of traditional single-family detached structures, compared to just 65 percent in the region. Research suggests younger home buyers seek housing options offering a walkable lifestyle not often found in markets dominated by single-family detached homes. **However, since the onset of the pandemic, there has been an increasing demand for larger single-family homes, offering greater outdoor area and space for a home office - a current trend which bodes favorably for the County’s residential housing stock.**

Housing Units by Structure Type, 2019

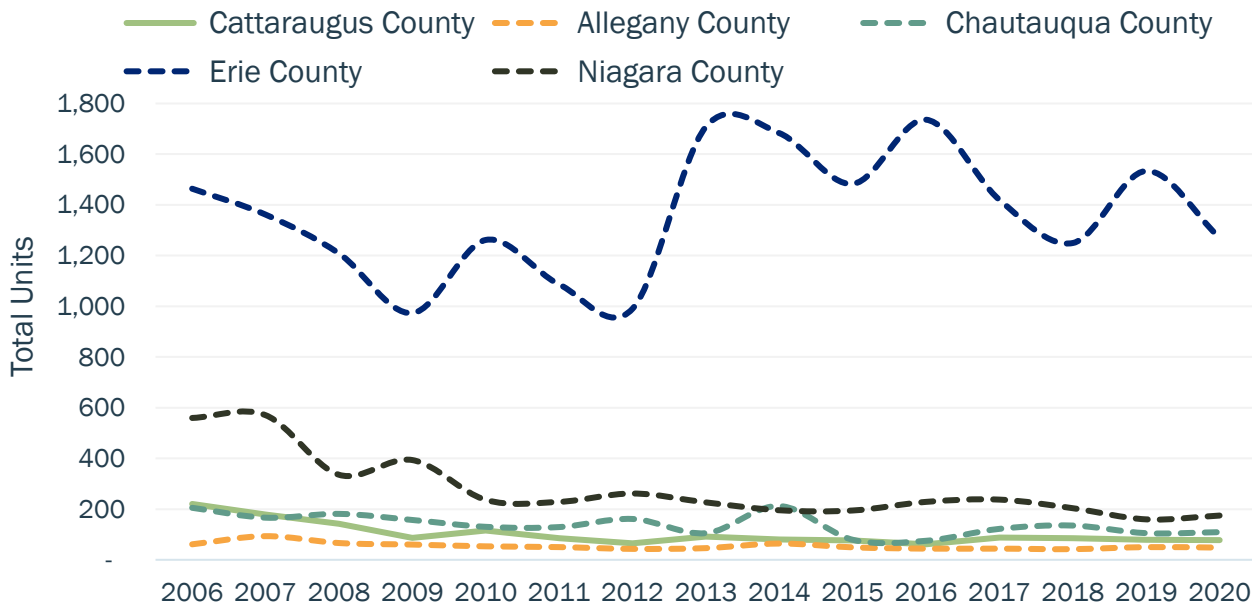


Source: Esri, 4ward Planning Inc., 2021

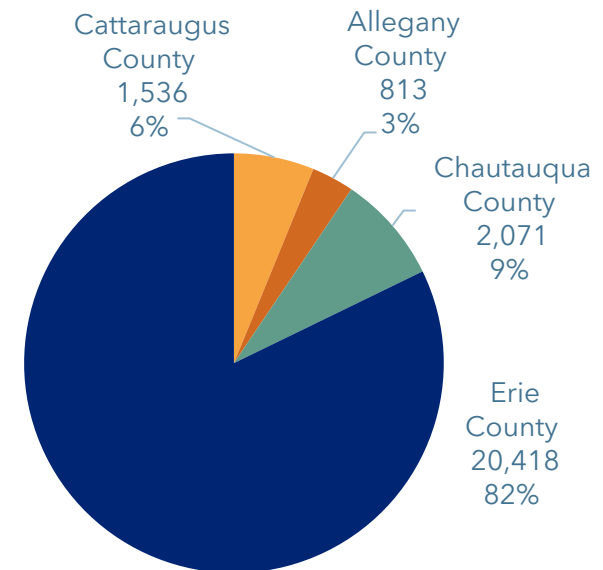
Housing Pipeline: Western NY

The charts below illustrate total housing permit trends for the Western NY region based on data provided by the U.S. Census Bureau’s Building Permits Survey. From 2006 to 2020, a total of 29,051 units were permitted in the region. The large majority of units permitted in the region since 2006 (82 percent) were located in Erie County. Just six percent of all housing permitted in the region since 2006 was within Cattaraugus County (1,536 units), likely reflective of the County’s flat population growth.

Total Housing Permit Trends, Western NY



Total Housing Permits: Western NY (2006-2020)



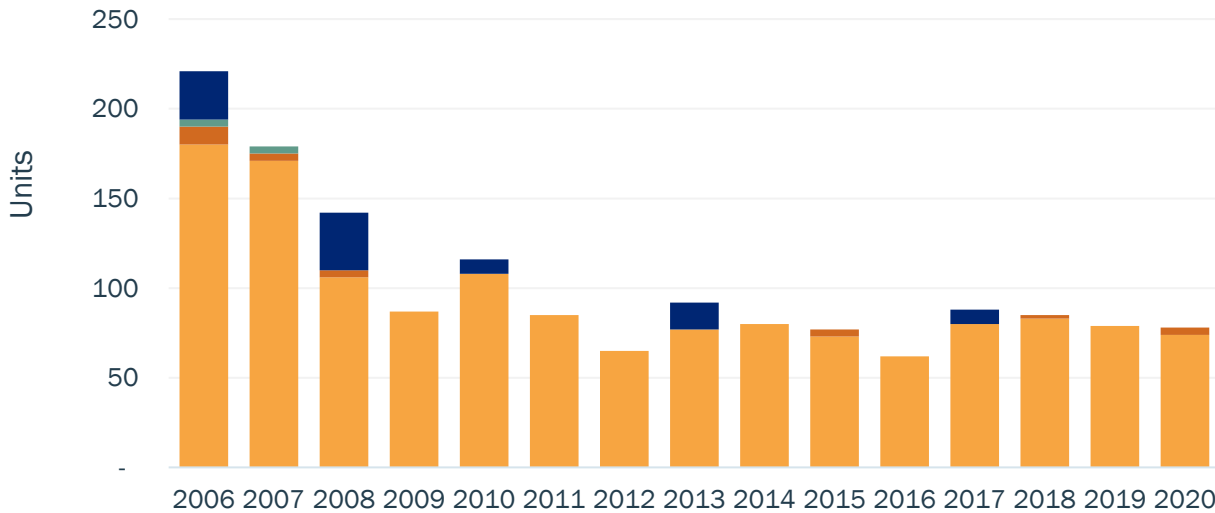
Source: U.S. Census Bureau’s Building Permits Survey, 2021

Housing Pipeline: Cattaraugus County

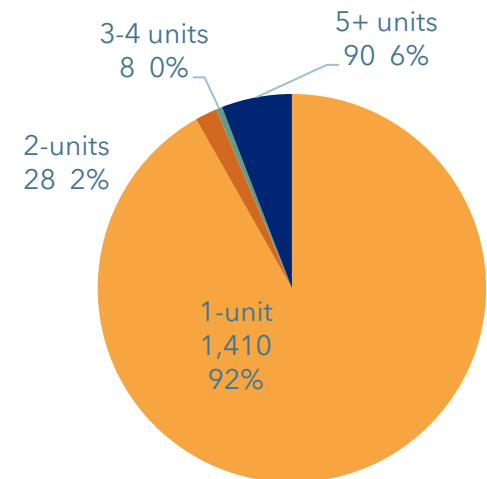
The charts below illustrate housing permit trends for Cattaraugus County based on data provided by the U.S. Census Bureau’s Building Permits Survey. Approximately 92 percent of this development permitted since 2006, is characteristic of single-family housing (1,410 units). Notably, the number of housing permits dipped after the previous economic recession (2007 to 2009) and has remained relatively flat since 2009. Given the current high cost of housing construction, compared to market purchase prices, it is unlikely there will be a significant increase in new housing starts any time soon.

Housing Permit Trends: Cattaraugus County

1-unit 2-units 3-4 units 5+ units



Total Housing Permits: Cattaraugus County (2006-2020)

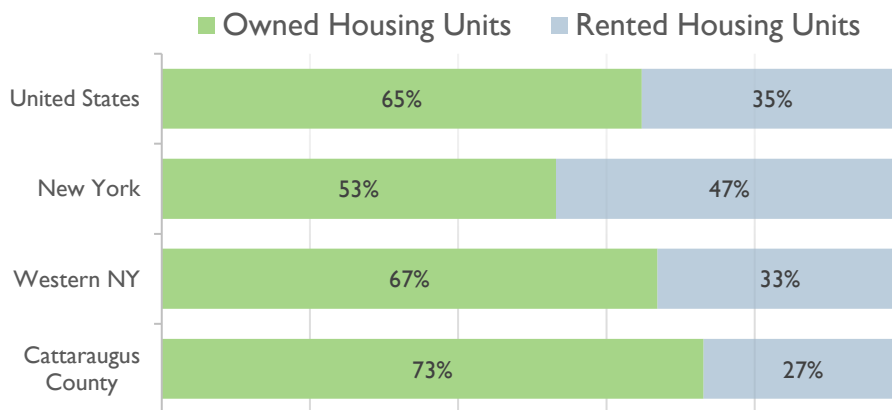


Source: U.S. Census Bureau’s Building Permits Survey, 2021

Housing Tenure

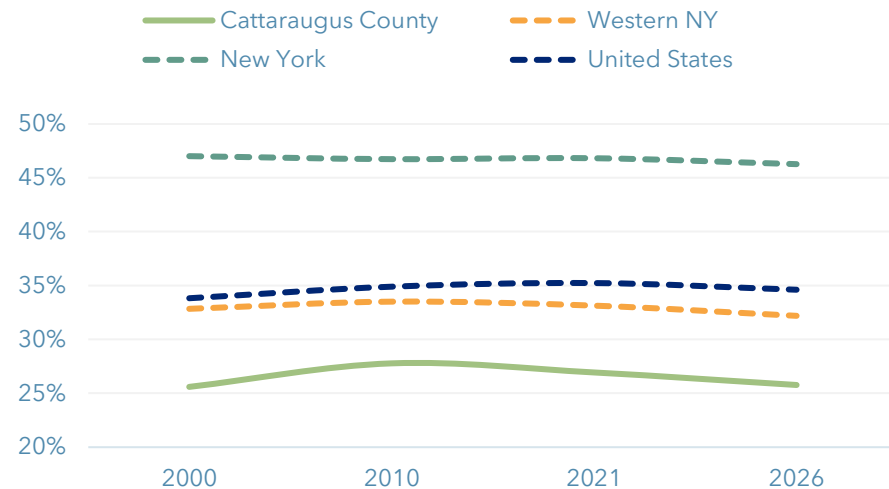
Housing tenure refers to whether a housing unit is owner- or renter-occupied. A healthy housing market is one that has a sufficient supply of units to satisfy the needs of households looking to own and rent. Although renting is most common among young adults, nearly everyone rents at some point in their lives - whether by choice or necessity. As illustrated below, in 2020, only 27 percent of all occupied housing units in Cattaraugus County were renter-occupied, a share lower than those found in both the Western NY region (33 percent) and New York state (47 percent). While the share of renter-occupied housing units in all geographies increased from 2000 to 2021, they are expected to decline, albeit remain relatively flat through 2026. **Our interviews with local residential real estate brokers confirmed these findings and suggested demand for more rental units in Cattaraugus County, particularly those that would satisfy lower-income workforce housing demand in business service areas.**

Housing Tenure as Share of Total Occupied Units, 2021



Source: Esri; 4ward Planning Inc., 2021

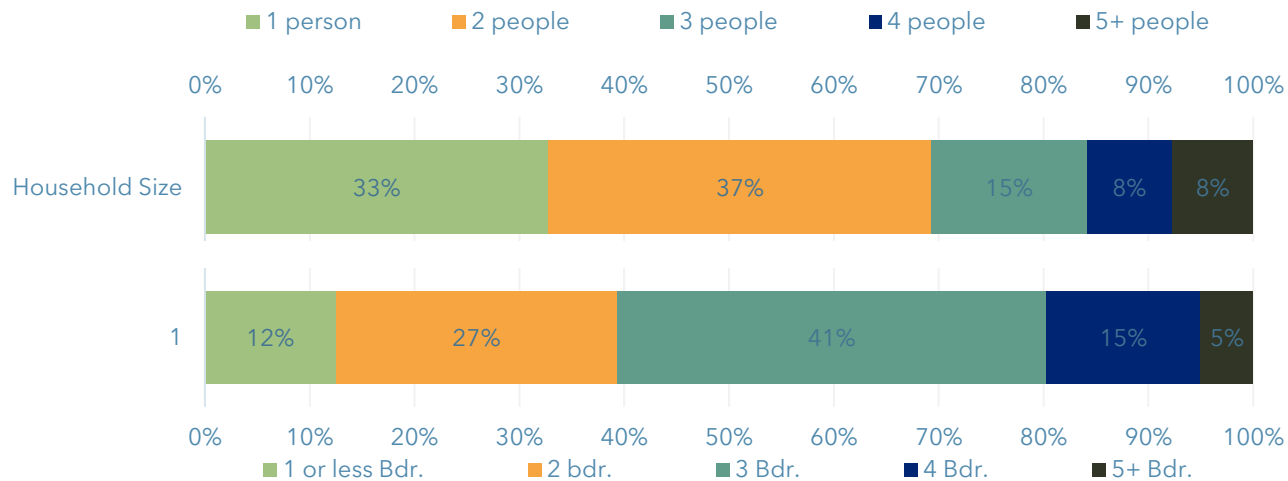
Share Renter-Occupied Housing



Household and Unit Size: Cattaraugus County

One way to measure whether the existing housing stock is suited to the local population is to compare household size to the number of bedrooms within dwelling units in the local inventory (unit size). The share of one- and two-person households combined (70 percent) is much larger than the share of studio, and one- and two-bedroom units, combined (39 percent). In other words, there is a mismatch between housing unit size and household size among County households. The development of one- and two-bedroom units in the County could help relieve the existing shortage of smaller housing units, relative to household size. Our interviews with local real estate brokers confirmed there is demand for smaller housing units in Cattaraugus County, particularly among lower-income workers and those looking to downsize.

Household Size vs. Unit Size, 2019

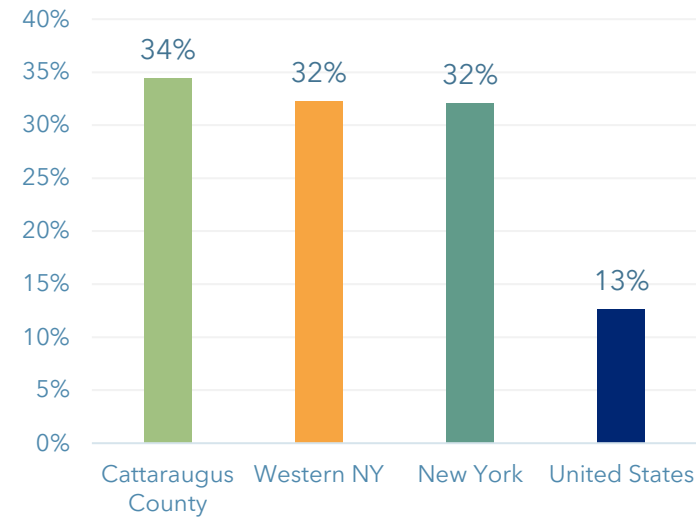


Source: 2019 ACS 1-Year Estimates, B11016; DP04

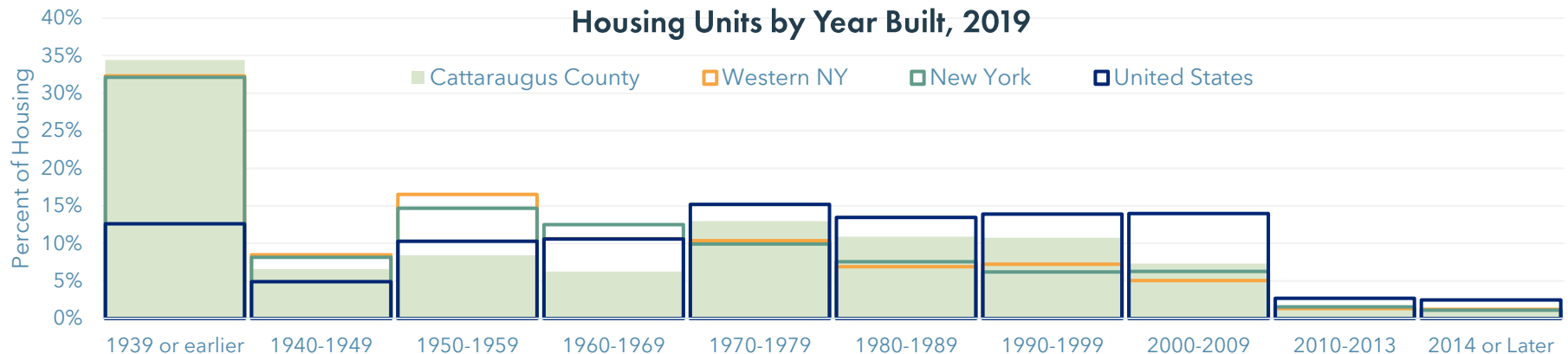
Housing Stock Characteristics

The age of housing units is used to analyze the condition of housing stock in terms of physical needs and historical significance. While housing built before current building codes may present potential hazards from faulty wiring or lead-based paint, older homes can also indicate historical significance which may lend to desirable community character. Compared to that of the nation, Cattaraugus County's housing stock is relatively old - similar to the housing stock found throughout the region and State. For example, within Cattaraugus County, approximately 34 percent of all housing was built before 1940 - compared to just 13 percent within the nation. **This suggests a housing rehab program (if not currently present) will be necessary.**

Housing Built 1939 or Earlier



Housing Units by Year Built, 2019

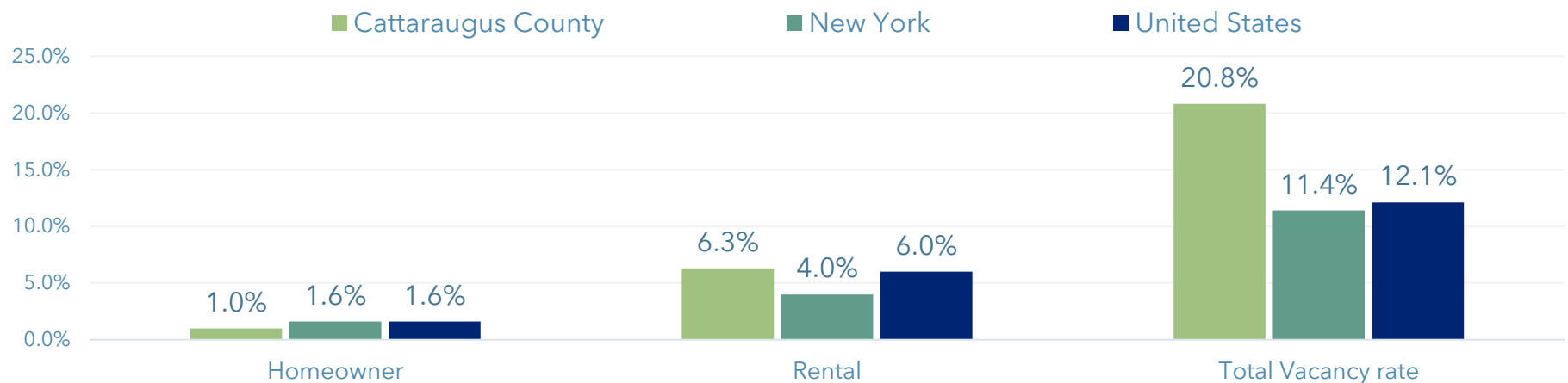


Source: Esri

Housing Vacancy By Tenure: Cattaraugus County

In general, a vacancy rate of between four and seven percent is an indicator of a relatively healthy housing market. Although the average housing vacancy rate is very high in Cattaraugus County (20.8 percent in 2019), this vacancy rate includes seasonal and other vacant units (units which are vacant due to a sales or leasing transition, repairs being conducted, or for the owner's personal reasons). The vacancy rate for ownership and rental units within Cattaraugus County was much lower (at 1.0 percent and 6.3 percent, respectively, in 2019). The relatively low owner-occupied vacancy rate suggests there is likely not enough market receptive housing inventory available - **this issue, left unaddressed, will lead to upward price pressure on the existing inventory and undermine the County's economic competitiveness.**

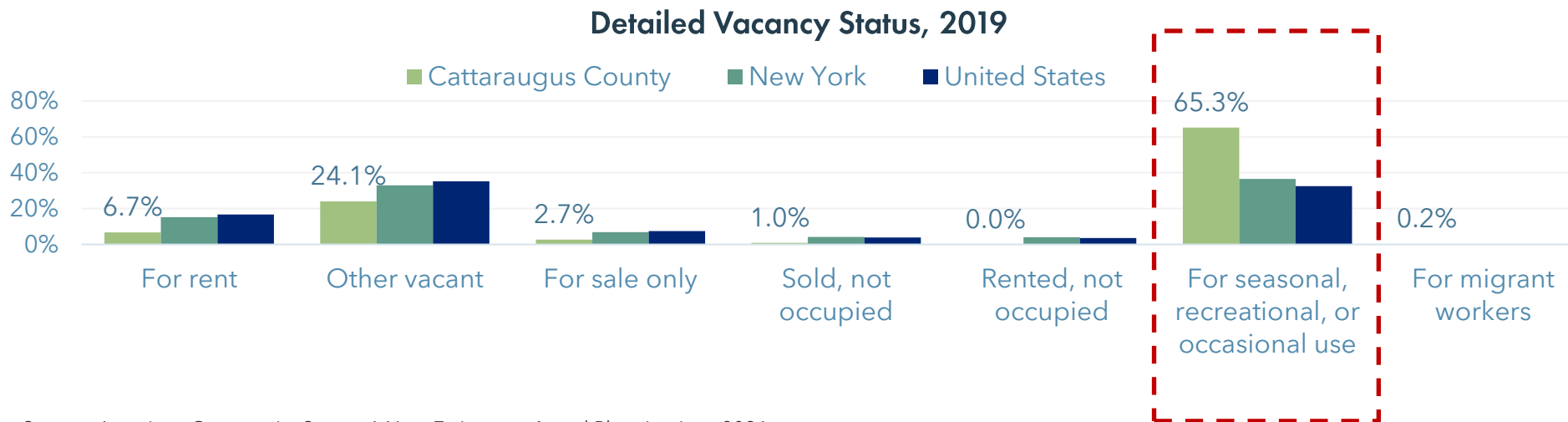
Vacancy Rate Trends by Housing Tenure, 2019



Note: Rental and homeowner vacancy rates do not include "other vacant" or "seasonal" units in the calculation of vacancy rates.
Source: American Community Survey 1-Year Estimates; 4ward Planning Inc., 2021

Detailed Housing Vacancy: Cattaraugus County

The Census classifies vacant units into housing market classifications. For example, rental units are separated into vacant units offered "for rent," and those "rented, not occupied" (e.g., rent has been paid, but new renter has not moved in). Likewise, for-sale units are separated into vacant units offered "for sale only," and those "sold, not occupied" (e.g., unit has recently been sold but the new owner has not moved in). "For seasonal, recreational, or occasional use" units are vacant units used only in certain seasons or other occasional use. "Migrant units" (less than one percent in Cattaraugus County) are vacant units intended for migratory workers. If a vacant unit does not fall into any of the above classifications, it is classified as "other vacant" (e.g., owner that does not want to rent or sell; or house is being used for storage, being foreclosed upon, or being repaired or renovated). The number of seasonal units in Cattaraugus County (5,670 units) represents a relatively large share (65 percent) of all vacant units in 2019.

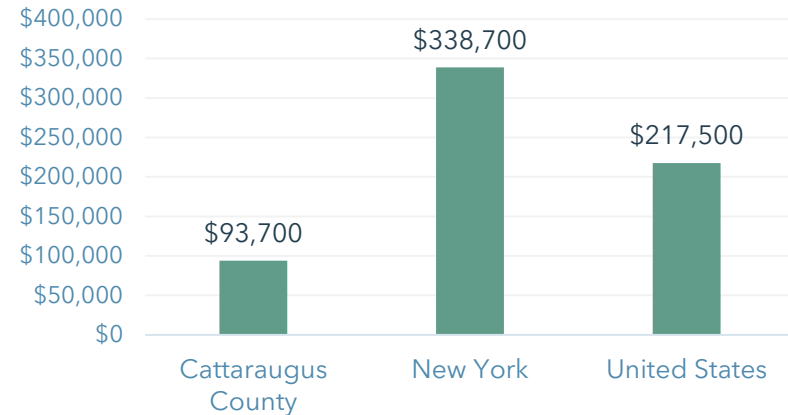


Source: American Community Survey 1-Year Estimates; 4ward Planning Inc., 2021

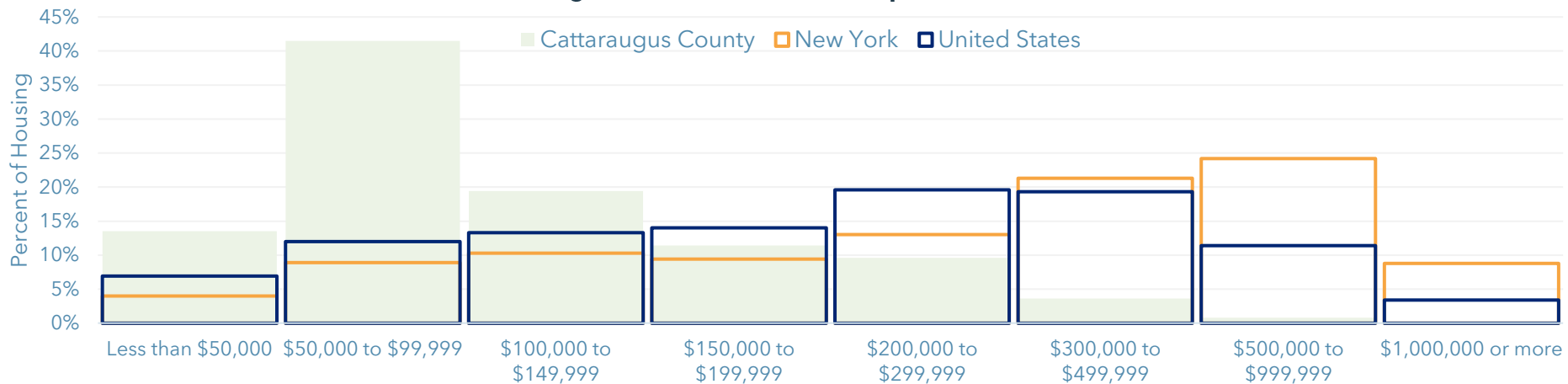
Housing Values

As illustrated in the table to the right, Cattaraugus County's median housing value (\$93,700) is much lower than those within the State and nation. Compared to these geographies, the County has much higher shares of owner-occupied housing units valued between \$50,000 and \$99,000. **This value range is indicative of the relatively low cost of living in the County and should be strongly promoted within an economic development strategy for employers, as well as employees.**

Housing Value of Owner-Occupied Units, 2019



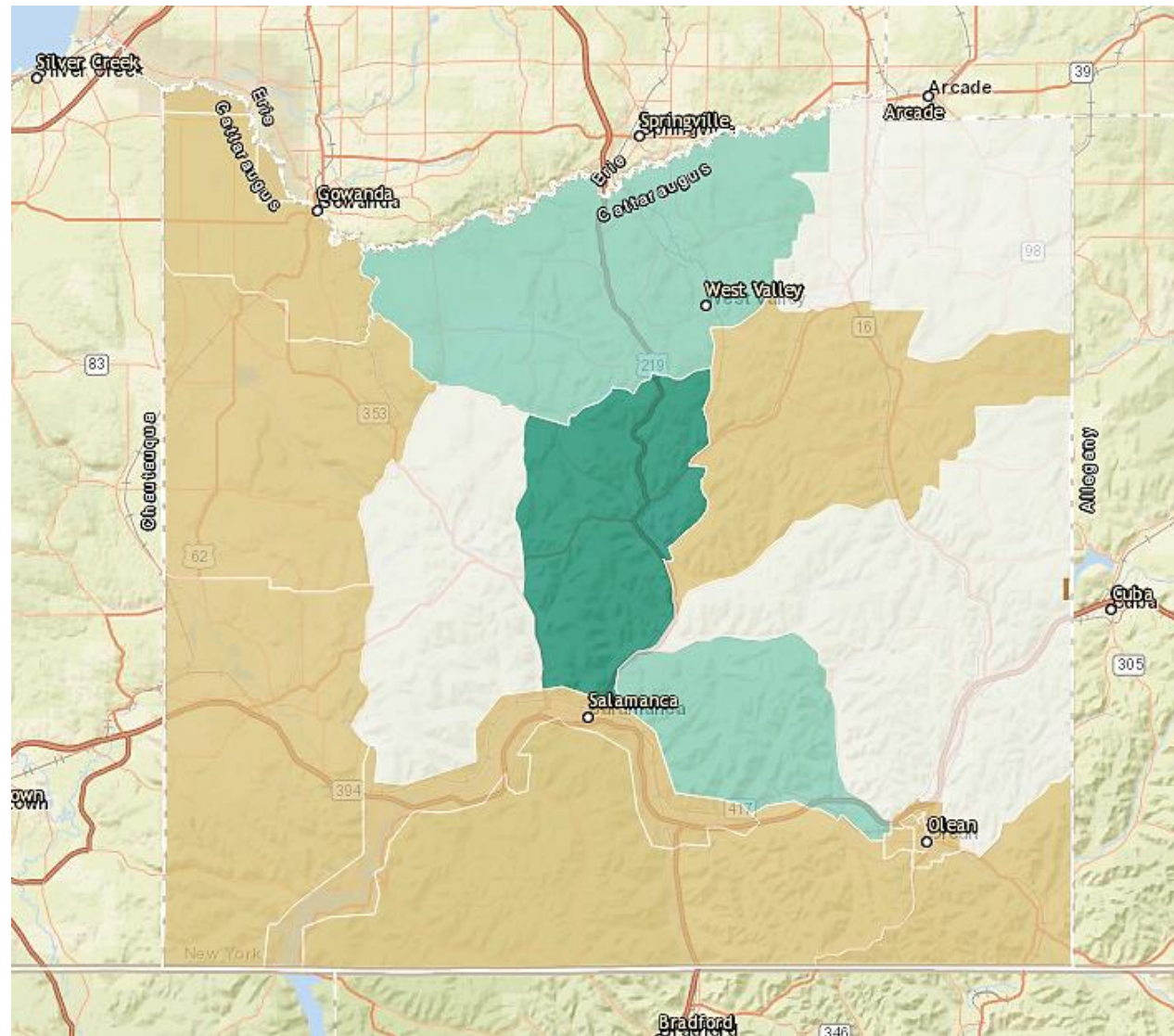
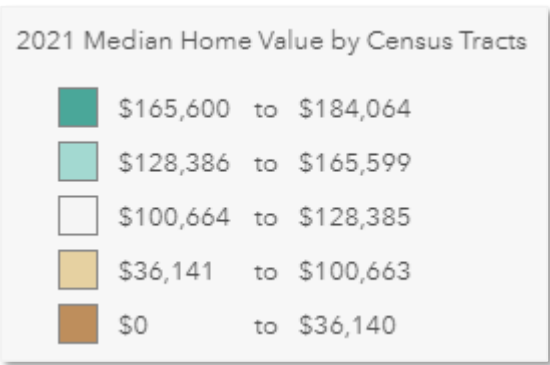
Housing Value of Owner-Occupied Units, 2019



Source: 2019 ACS 1-Year Estimates, DP04.

Housing Values: Cattaraugus County

According to 2019 data provided by Esri, median home values are highest in central Cattaraugus County, north of Salamanca, where median homes values are as high as \$184,064 (census tract 360099607.02). This area, likely, correlates with higher median household incomes and educational attainment levels.

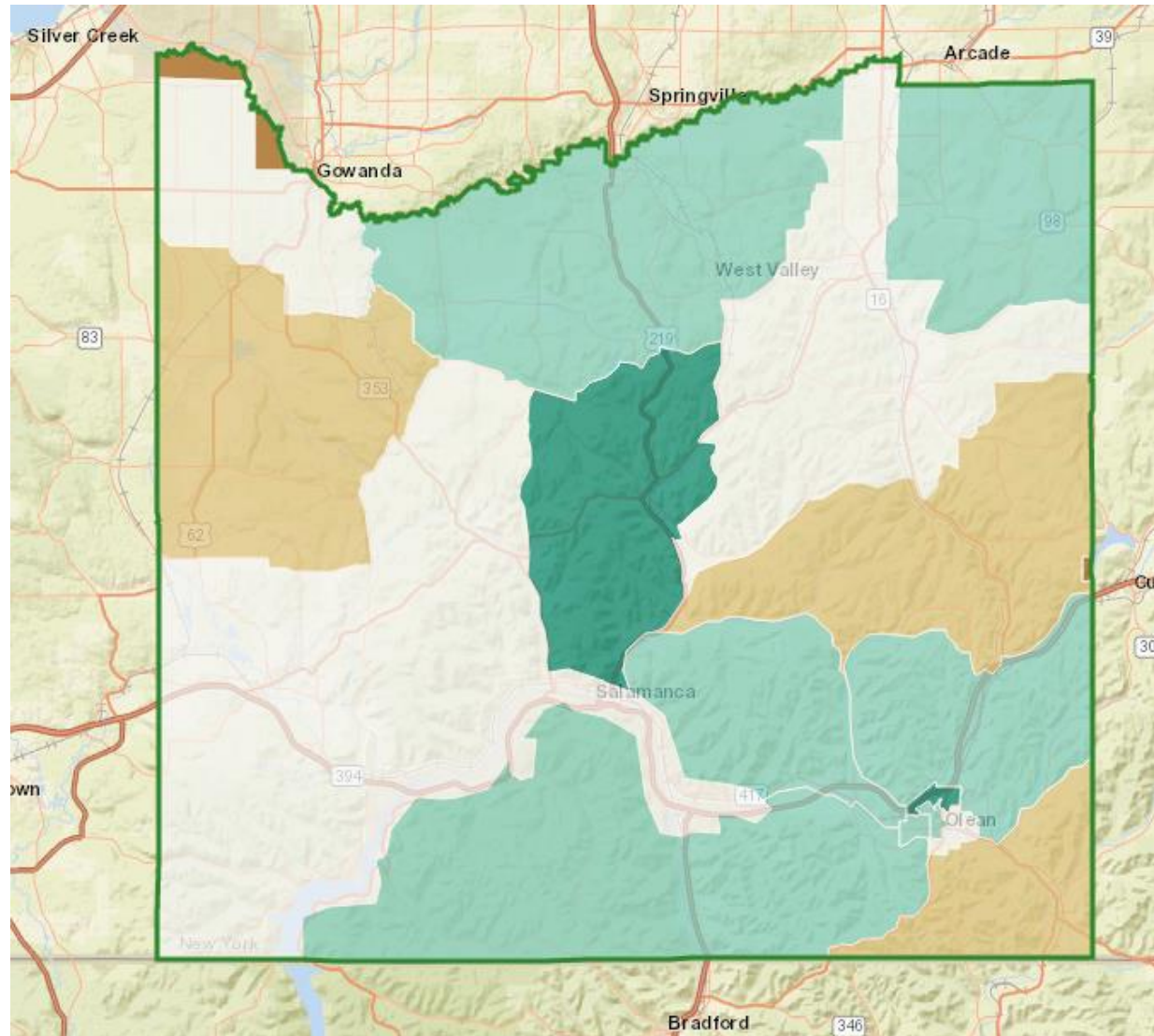


Source: Esri; 4ward Planning Inc., 2021

Median Contract Rent: Cattaraugus County

According to 2019 data provided by Esri, median contract rents are also highest in central Cattaraugus County, north of Salamanca, where median rents are as high as \$637 per month (census tract 360099607.02). **As with owner-occupied housing costs, median rent is relatively low and supports a low cost-of-living environment.**

2019 Median Contract Rent (ACS 5-Yr)

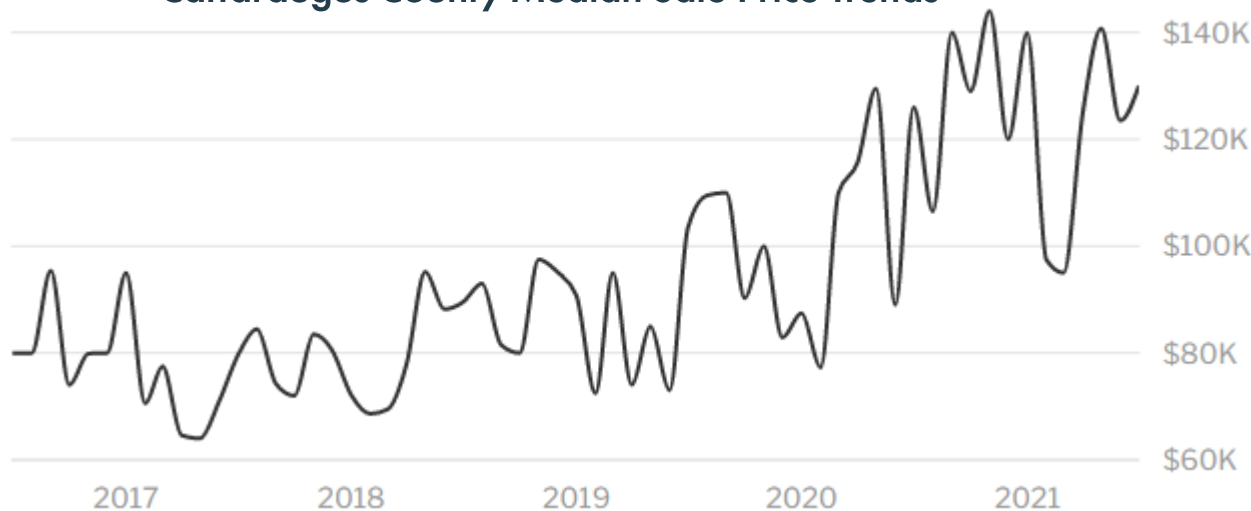


Source: Esri; 4ward Planning Inc., 2021

Home Sale Trends: Cattaraugus County

In July 2021, Cattaraugus County home prices were up 3.2 percent compared to last year, selling for a median price of \$130,000. On average, homes in Cattaraugus County sell after 24 days on the market, compared to 80 days last year. There were 68 homes sold in July 2021, down from 78 last year. The Covid-19 pandemic resulted in new home buyers leaving urban centers in search of more outdoor space and more spacious quarters. According to our interviews with local real estate professionals, this spike in home sales and prices has been accompanied by an increase in second-home buyers from beyond Cattaraugus County.

Cattaraugus County Median Sale Price Trends



Cattaraugus County Housing Market Trends

Median Sale Price \$130,000 +3.2% year-over-year
of Homes Sold 68 -12.8% year-over-year
Median Days on Market 24 -70.6% year-over-year

Source: Redfin, as of July 2021

Non-Residential

Key Findings: Non-Residential

2.3 million square feet of available commercial space

According to data provided by Property Shark, as of September 2021, there is more than 2.3 million square feet of commercial space available for lease or for sale in Cattaraugus County, most of which is located within the City of Olean (2.0 million).

785,500 square feet of major shopping center space

According to data provided by the Directory of Major Malls (DMM), approximately 785,500 square feet of the County's major shopping center space is contained within two shopping centers: the Olean Center Mall and Walmart Plaza. The Olean Center Mall has recently been sold to a Rochester developer and is likely in need of being renovated or repurposed.

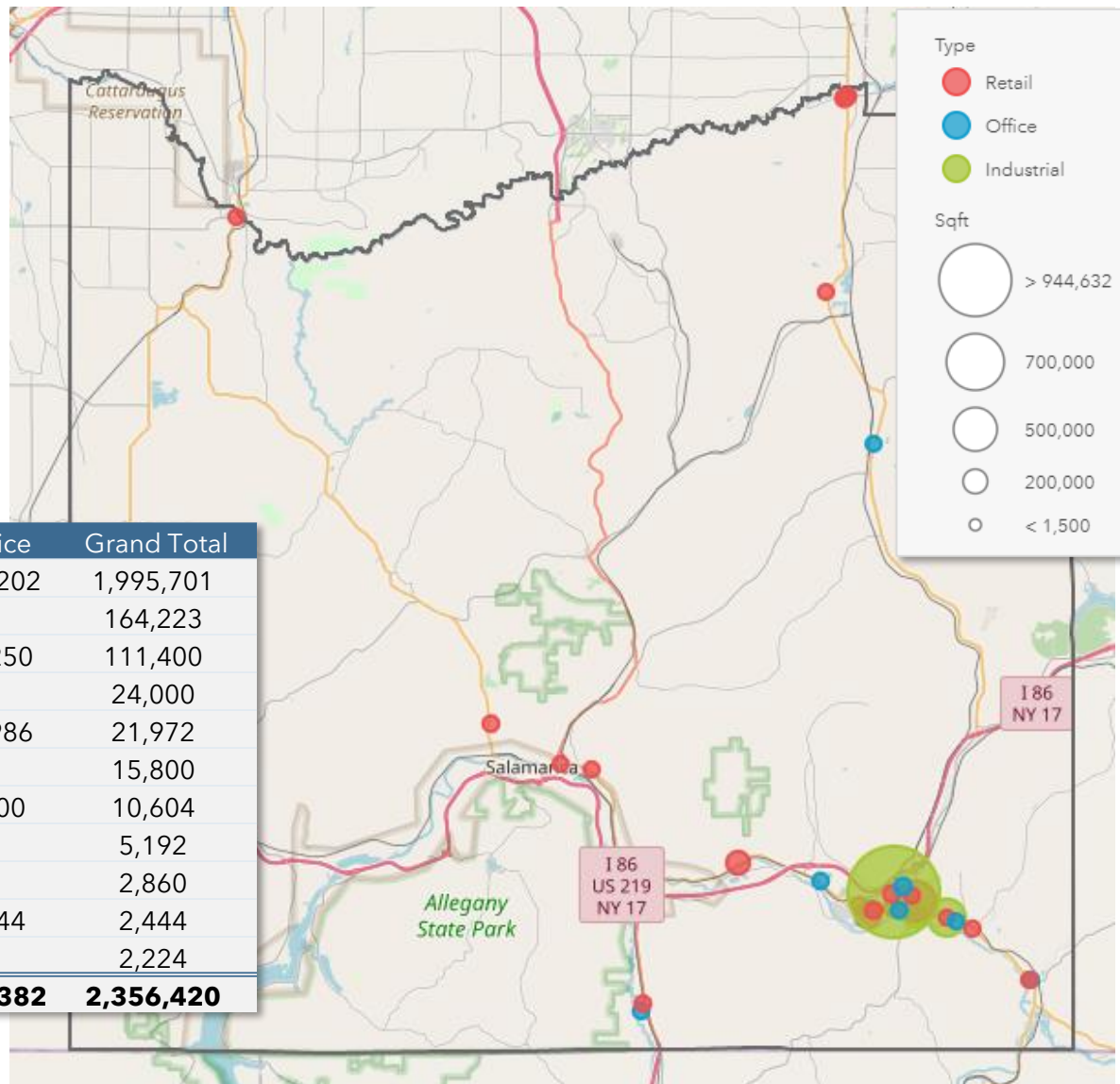
Restaurants are capturing retail sales

The County is experiencing the greatest "capture" of retail sales in restaurants and other eating establishments - meaning that either people living outside the County purchase food items inside the County, or people living within the County consume more than would be expected, given their income levels.

Available Properties: Cattaraugus County

According to data provided by Property Shark, as of September 2021, there is more than 2.3 million square feet of commercial space available for lease or for sale in Cattaraugus County, most of which is located within the City of Olean (2.0 million).

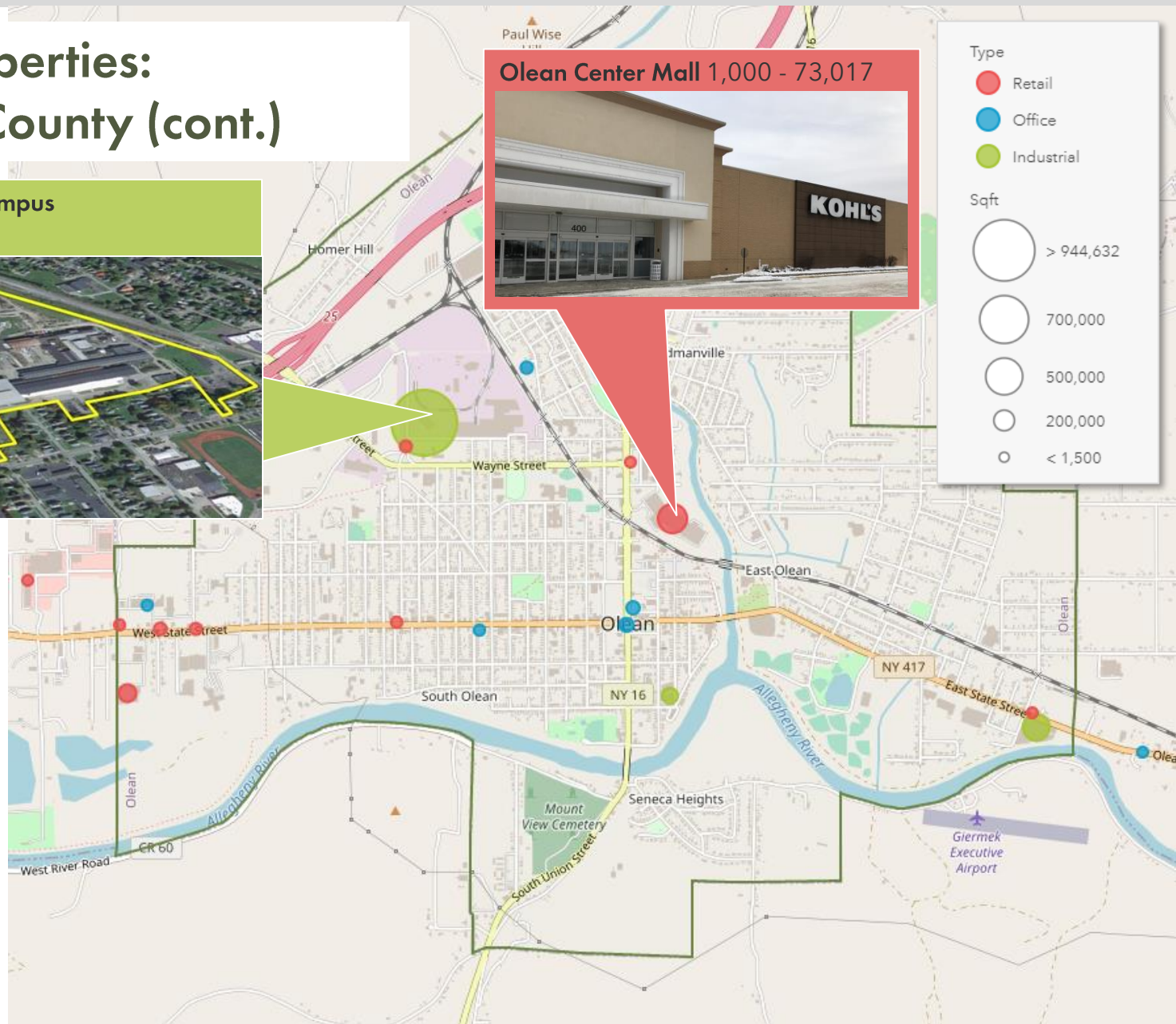
Location	Industrial	Retail	Office	Grand Total
Olean	1,311,076	538,423	146,202	1,995,701
Yorkshire	-	164,223	-	164,223
Allegany	-	100,150	11,250	111,400
Sardinia	24,000	-	-	24,000
Limestone	-	10,986	10,986	21,972
Salamanca	-	15,800	-	15,800
Portville	-	7,104	3,500	10,604
Kill Buck	-	5,192	-	5,192
Gowanda	-	2,860	-	2,860
Franklinville	-	-	2,444	2,444
Machias	-	2,224	-	2,224
Grand Total	1,335,076	846,962	174,382	2,356,420



Source: PropertyShark.com, September 2021

Available Properties: Cattaraugus County (cont.)

Former Siemens Energy Campus
944,632 SF, \$7.5 million



Type

- Retail
- Office
- Industrial

Sqft

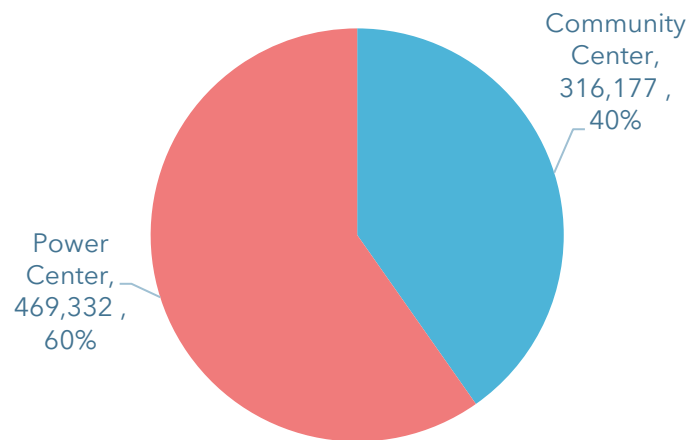
- > 944,632
- 700,000
- 500,000
- 200,000
- < 1,500

Source: PropertyShark.com,
September 2021

Major Shopping Centers: Cattaraugus County

As summarized below and presented in more detail on the following page, according to data provided by the Directory of Major Malls (DMM), approximately 785,500 square feet of the County's major shopping center space is contained within two shopping centers. As illustrated in more detail on the following page, the Olean Center Mall contains approximately 316,200 square feet of community shopping space with major anchors including JCPenney, Kohl's, and Bon-Ton (closed in 2019). Walmart Plaza contains approximately 469,300 square feet of power center shopping space with major anchors including AMC 8 Theatres, BJ's Wholesale Club, Home Depot, and Walmart. The Olean Center Mall has recently been sold to a Rochester developer and is likely in need of being renovated, adaptively reused or redeveloped.

Total GLA: Cattaraugus County



According to DMM, the selected shopping centers are generally classified as follows, although some centers may be defined differently depending on their customer base:

- **Community Center** - 200,000 to 499,999 square feet in size
- **Power Center** - usually open-air in design and with three or more big-boxes

Sources: Directory of Major Malls; Esri, OnTheMap; 4ward Planning Inc., 2021

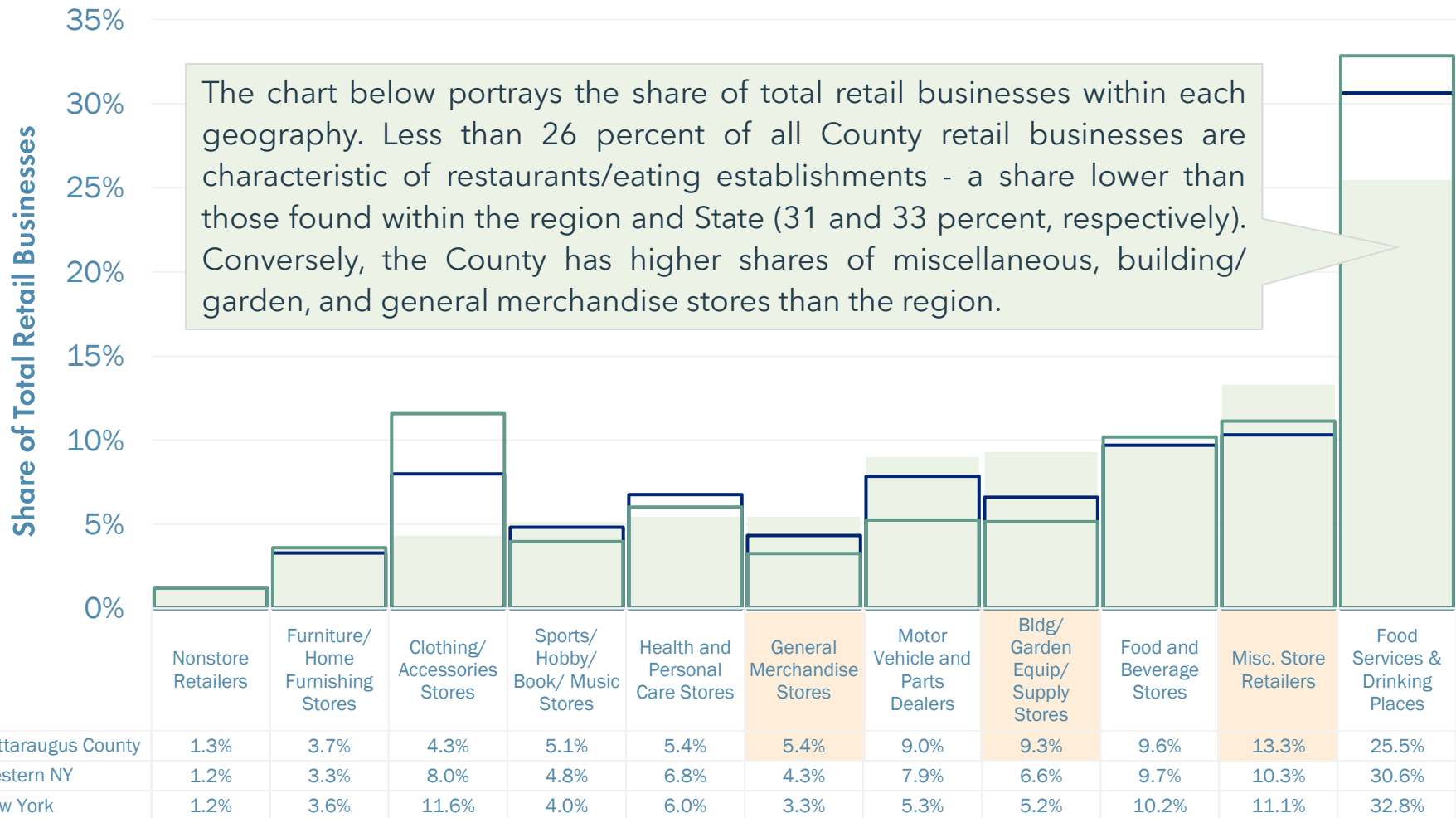
Major Shopping Centers: Cattaraugus County (cont.)



	Walmart Plaza	Olean Center Mall
Center Basics		
City	Olean	Olean
Center Classification	Power Center	Community Center
Design Type		
GLA-sqft	469,332	316,177
Site Size (Acres)	n/a	27
Anchor Store		
Anchor Stores	AMC 8 Theatres (24,000) BJ's Wholesale Club (71,760) The Home Depot (116,006) Walmart (199,376)	Bon-Ton (Closed 2019) (73,017) JCPenney (84,429) Kohl's (55,836)
Renovation Need		
Year Opened	1995	1977
Last Renovation	1996	1995
Renovation Planned	No	No

Sources: Directory of Major Malls; Esri; Donovan Real Estate Services; 4ward Planning Inc., 2021

Estimated 2017 Retail Business Mix



Source: Esri; 4ward Planning Inc., 2017

2017 Retail Gap per Household

According to 2017 data provided by Esri, the County is experiencing “leakage” of grocery store sales - likely meaning that either people living within the trade area shop for groceries outside the County, or people living within the County consume less than would be expected, given their household income levels.

Conversely, the County is experiencing the greatest “capture” of retail sales in restaurants and health related services - meaning that either people living outside the County purchase these items inside the County, or people living within the County consume more than would be expected, given their income levels.



Source: Esri; 4ward Planning Inc., 2017

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Key Findings: Labor and Industry Trends

Shrinking labor force

According to BLS data, Cattaraugus County's labor force has been decreasing since 1997 (when it was 42,410 persons). As of July 2021, there are 32,810 people in the County's labor force (9,600 fewer than in 1997). Declines in the size of the County's labor force are likely due to shrinking local employment opportunities, an aging workforce, and increasing retirements.

Educational services sector is top employer

While the educational services sector is the County's top employer, representing 17 percent of total jobs, this sector lost approximately 630 jobs in the County from 2000 to 2020. However, just 25 percent of these jobs are in the private sector.

Retail trade sector is top private sector employer

While the retail trade sector is the County's top private sector employer, representing 18 percent of total private sector jobs, this sector lost approximately 990 jobs in the County from 2000 to 2020. The retail trade sector often features jobs that are part-time or seasonal with few benefits.

Health care sector is relatively small and declining

The health care sector lost approximately 990 jobs over the past two decades and saw a sharp decline over the past two years, likely due to the Covid-19 crisis. The County's current share of jobs in the health care and social assistance (16 percent) is much lower than that in the region (20 percent).

Methodology: Labor and Industry Trends

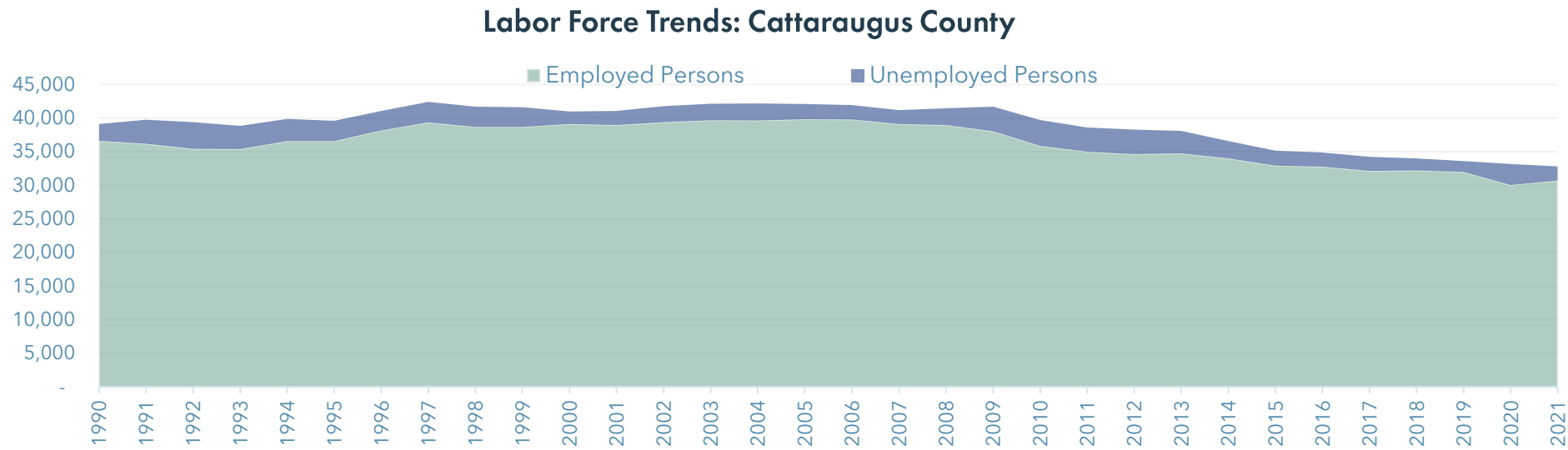
4ward Planning examined current labor market and industry trends within Cattaraugus County, including current and projected industry and occupational employment. Historical and current labor force, unemployment, and employment data by industry is provided by the U.S. Bureau of Labor Statistics (BLS)'s Local Area Unemployment Statistics. Primary job data is provided by the U.S. Census Bureau's Center for Economic Studies, Longitudinal Employer-Household Dynamics (LEHD) data for 2018 (the latest year available) via its OnTheMap data query tool. Priority occupations with high demand are based on data provided by the New York State Department of Labor's Short-Term Occupational Employment Projections, 2020-2022, and Currently Posted Priority Occupations for the Western Region and the Chautauqua-Allegany Local Workforce Development Areas (LWDAs).

The examination of projected industry and occupational employment data provides necessary insight into the types and quantity of commercial and industrial land uses which might be in demand over the coming years. **The quality and availability of labor in a given geography is, perhaps, the most critical determinant of the area's competitive business advantage, relative to neighboring jurisdictions.** Consequently, establishing baseline metrics for area labor supply and quality, as well as examining trends, will allow the County to understand its position against regional competitors (other counties). A thorough understanding of its competitive position, with respect to labor issues, will also allow the County to address shortcomings, where possible, over time.

The above effort is designed to elicit objective and subjective observations about the quality and depth of the local labor market, as well as identification of existing and/or prospective workforce development/placement collaborations between non-profits, higher-educational institutions (Jamestown Community College), government, and private industry.

Labor Force Trends

The U.S. Bureau of Labor Statistics (BLS) defines the labor force as all civilians classified as employed and unemployed. According to BLS data, Cattaraugus County's labor force has been decreasing since 1997 (when it was 42,410 persons). As of July 2021, there are approximately 32,810 persons (30,690 employed and 2,120 unemployed persons) in the County's labor force (9,600 fewer than in 1997). Declines in the size of the County's labor force are likely due to shrinking local employment opportunities, an aging workforce, and increasing retirements. A declining labor force will challenge private business investment over the long-term. **However, the County and its economic development partners can still ensure those remaining in the labor force are well trained.**

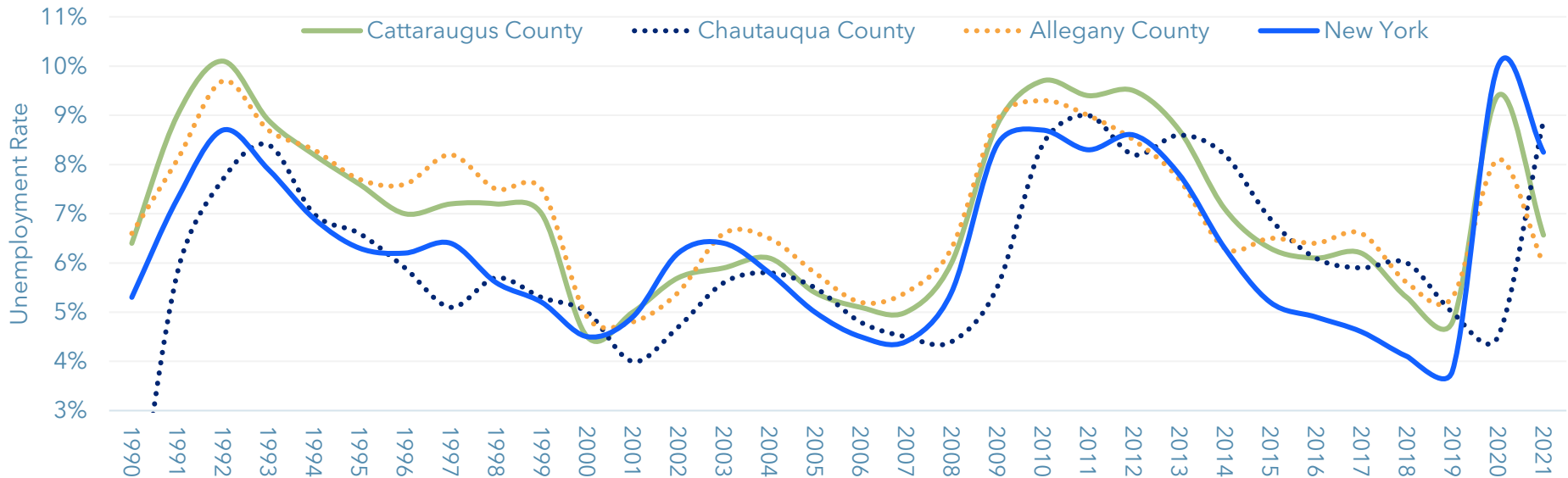


Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, data as of February 2021

Unemployment Trends

According to data provided by the BLS, illustrated below, before the 2020 coronavirus pandemic economic downturn, unemployment rates in the County generally mirrored those of the Southern Tier West region (composed of Allegany, Cattaraugus, and Chautauqua Counties) but typically exceeded those of the State. Although the unemployment rate in Cattaraugus County reached as high as 20.3 percent in April 2020, it decreased to 5.7 percent as of July 2021. The County currently has an average 2021 unemployment rate of 6.6 percent, a sharp increase from the historically low average unemployment rates experienced in 2019 (3.8 percent), suggesting either a mismatch in job requirements and available skill sets and/or wage offerings remaining lower than what’s demanded.

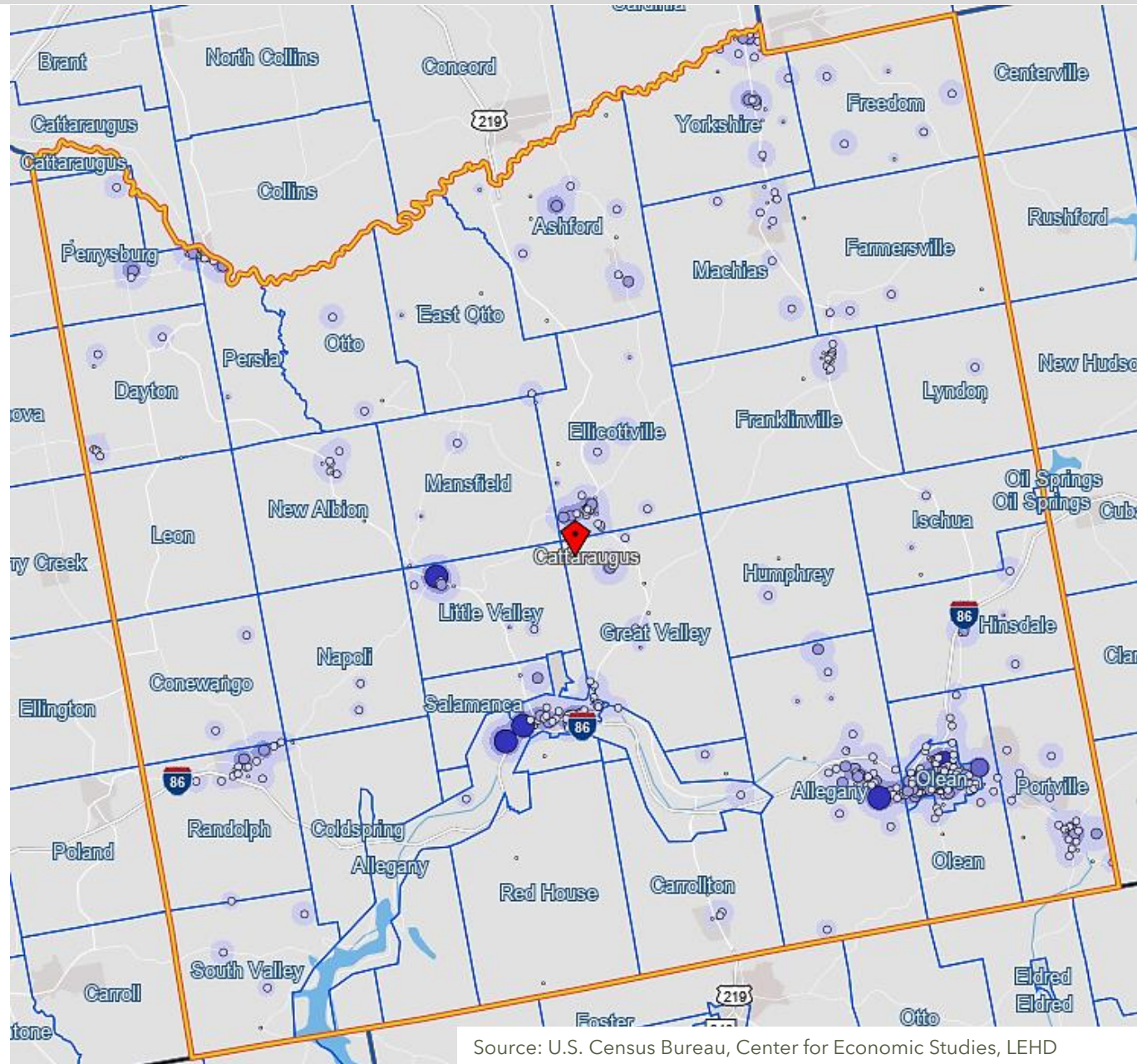
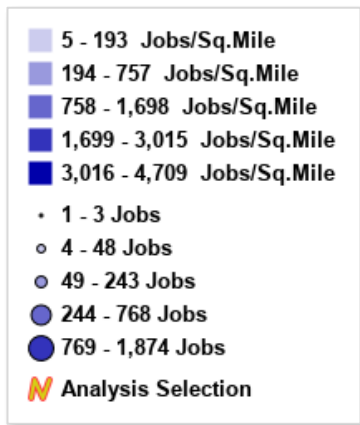
Average Annual Unemployment Rate



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, data as of July 2021

Primary Jobs

As illustrated in the map to the right, the County's primary jobs are largely clustered in Olean and Salamanca, according to 2018 data provided by the U.S. Census Bureau. A primary job is an individual's dominant job, defined as the job earning an individual the most money.

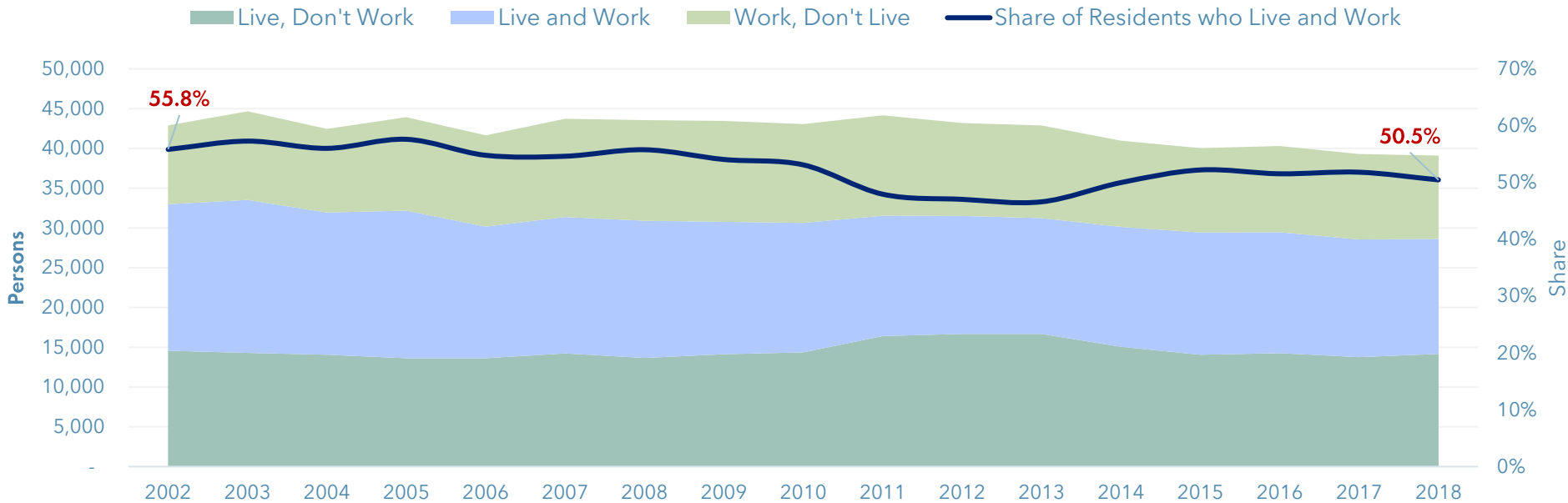


Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Travel Shed Analysis

According to primary job data provided by the U.S. Census Bureau, in 2018 (the latest year available), 50.5 percent of Cattaraugus County residents also worked in the County. Approximately 10,450 workers commuted into the County for work and 14,180 residents commuted outside the County for work. From 2002 to 2018, the share of residents both living and working in the County declined by approximately 5.4 percentage points, suggesting a greater share of better employment opportunities were found outside of the County.

Historic Worker Inflow/Outflow, Cattaraugus County

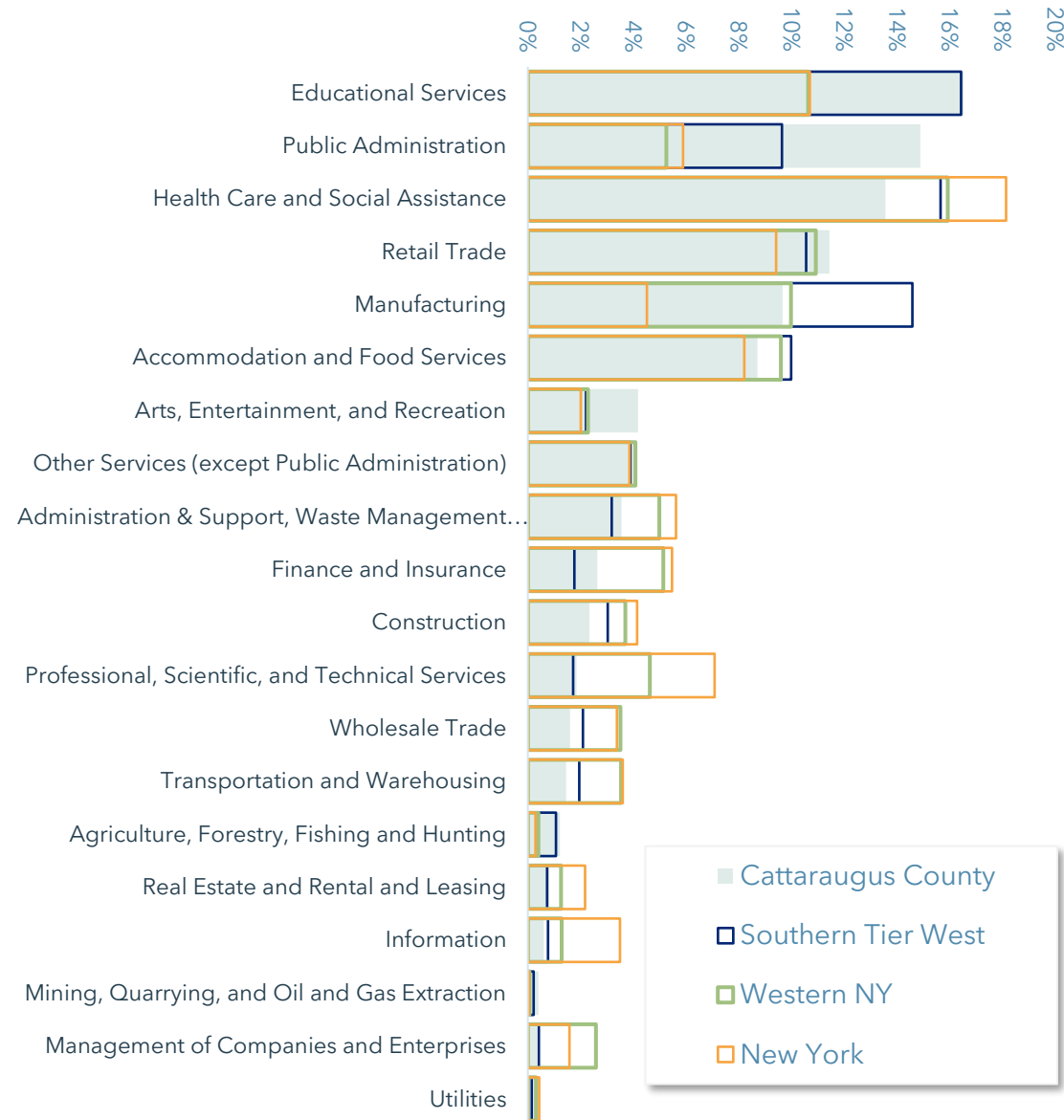


Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Share by Industry: All Jobs

The chart to the right compares percent employment by industry (down to the two-digit NAICS sector), based on average annual employment data provided by the U.S. Census Bureau (as of third-quarter 2020). The educational services sector is the County’s top industry by employment, representing 17 percent of total jobs. The relatively high share of education sector employment is likely due to the presence of higher educational institutions such as St. Bonaventure University and Jamestown Community College. **Provided student enrollments hold or increase, this industry sector provides a strong base of economic activity for the County.**

2020 Employment Share: All Jobs

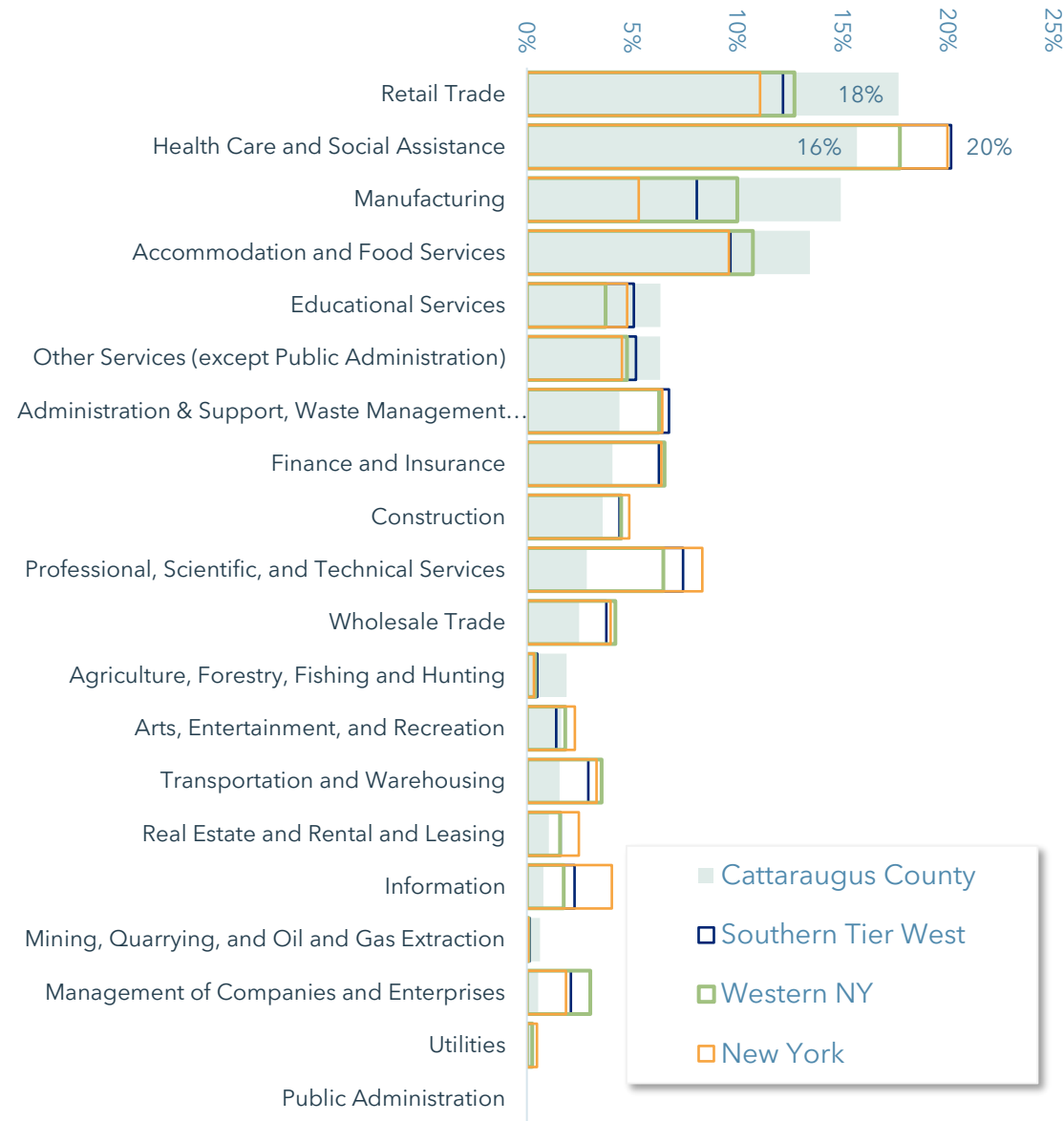


Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Share by Industry: Private Jobs

This chart compares percent private employment by industry (down to the two-digit NAICS sector), based on average annual employment data provided by the U.S. Census Bureau (as of third-quarter 2020). The retail trade sector is the County's top industry by share of private sector employment, representing 18 percent of total private sector jobs. The relatively high share of retail trade sector employment is likely due to the demand for retail goods and tourism related services associated with recreational visitors. The County's share of jobs in the health care and social assistance sector (16 percent) is much lower than that in the region (20 percent).

2020 Employment Share: Private Jobs

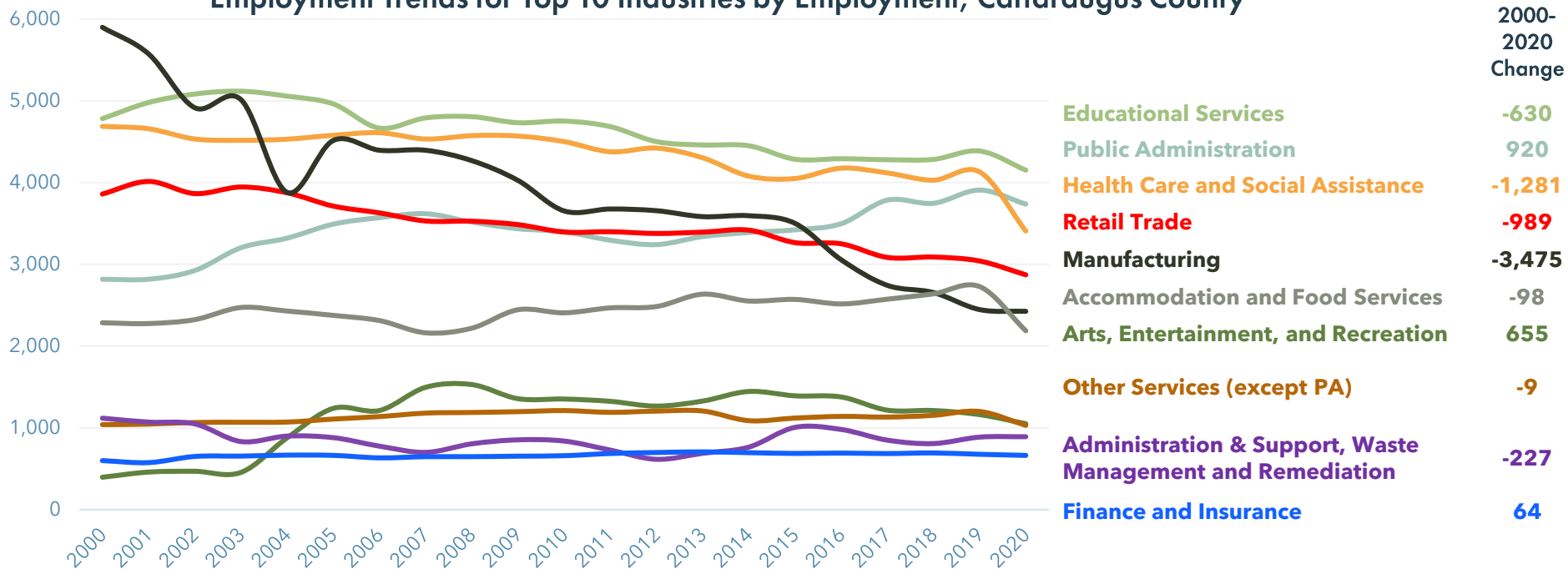


Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Top 10 Industry Employment Trends: All Jobs

The chart below presents employment trends for the top 10 industries by current employment. The public administration sector is the top sector that has increased the most over the past two decades (by 920 new jobs), while the manufacturing industry is the top sector that has decreased the most over the past two decades (by 3,475 fewer jobs). However, with more than 2,400 jobs, this sector can still be considered a major economic asset within the County.

Employment Trends for Top 10 Industries by Employment, Cattaraugus County

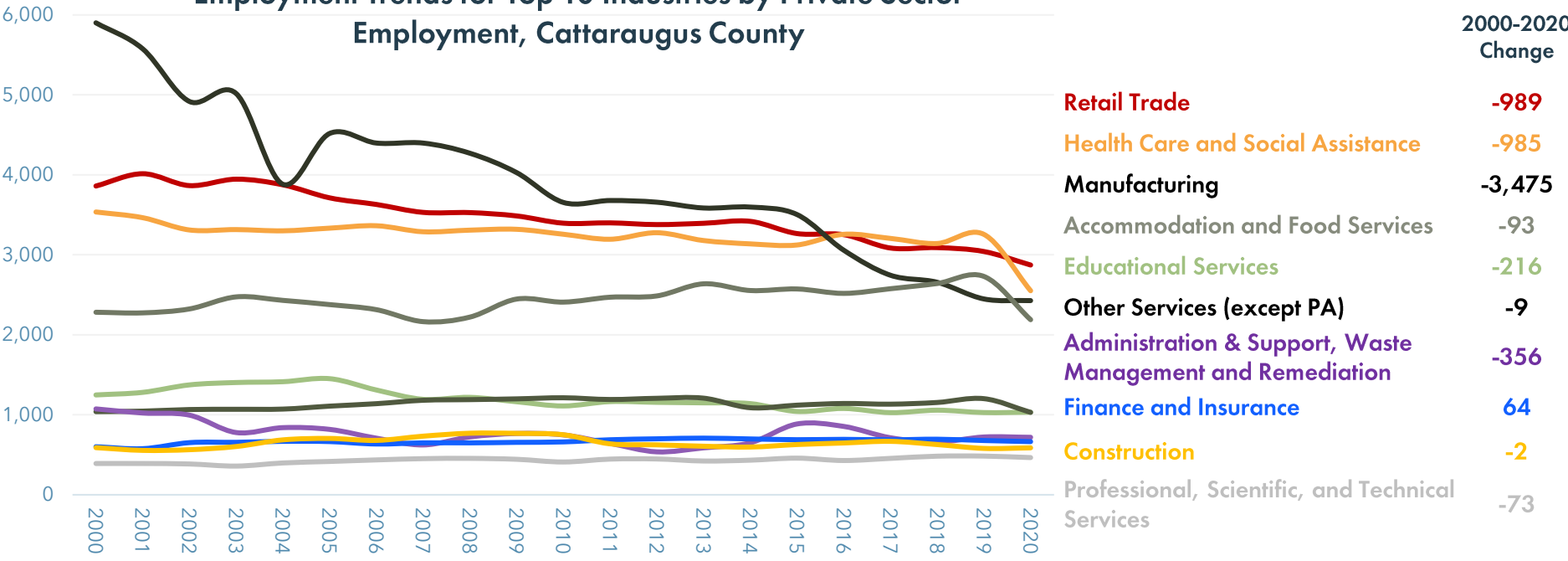


Source: U.S. Census Bureau, QWI Explorer.

Top 10 Industry Employment Trends: Private Jobs

The chart below presents private sector employment trends for the top 10 industries by current employment. The finance and insurance sector is the only top sector by private sector employment that has increased over the past two decades (by 64 new jobs). The top two sectors by private sector employment - the retail trade and health care sectors - both lost approximately 990 jobs over the past two decades. As illustrated below, the manufacturing sector has experienced the greatest employment decline over the past two decades, losing 3,475 jobs from 2000 to 2020.

Employment Trends for Top 10 Industries by Private Sector
Employment, Cattaraugus County



Source: U.S. Census Bureau, QWI Explorer.

Priority Occupations in High Demand: Western NY & LWDA

Local Workforce Development Areas (LWDAs) are required to develop and continually update the list of in-demand occupations in their regions. The table below presents the 13 occupations that are in high demand within the Chautauqua-Allegany LWDA and are also priority occupations in the Western NY region. All occupations, except personal care aides, have a median annual wage higher than the current average in Cattaraugus County (\$36,220) and none require prior work experience. Registered nursing is the top in-demand priority occupation in the region.

Occupational Title	Potential Industry Cluster	Median Annual Wages (2021)	Typical Education Needed For Entry	Work Experience In A Related Occupation	Typical OTJ Training Needed
Registered Nurses	Health Care	\$91,580	Bachelor's Degree	None	None
Correctional Officers & Jailers	Protection Service	\$71,990	High School Diploma	None	Moderate-term
Industrial Machinery Mechanics	Machine	\$62,510	High School Diploma	None	Long-term
Tool and Die Makers	Machine	\$58,680	High School Diploma	None	Long-term
Licensed Practical and Licensed Vocational Nurses	Health Care	\$52,340	Postsecondary Non-degree Award	None	None
Welders, Cutters, Solderers, and Brazers	Metal	\$51,210	High School Diploma	None	Moderate-term
Machinists	Machine	\$49,770	High School Diploma	None	Long-term
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	Metal	\$43,900	High School Diploma	None	Moderate-term
Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	Metal	\$43,390	Postsecondary Non-degree Award	None	Moderate-term
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	Metal	\$42,900	High School Diploma	None	Moderate-term
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	Metal	\$40,450	High School Diploma	None	Moderate-term
Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	Metal	\$39,780	High School Diploma	None	Moderate-term
Personal Care Aides	Health Care	\$32,020	High School Diploma	None	Short-term

Source: New York State Department of Labor, Division of Research & Statistics, Short-Term Occupational Employment Projections, 2020-2022, Currently Posted Priority Occupations by the Western Region and LWDAs

Great Lakes Cheese Company

Slated for development beginning in the spring of 2022 and to be operational by early 2025, the \$505 million, 500,000-square-foot Great Lakes Cheese Company facility is much anticipated by Cattaraugus County. The plant will continue to employ the 226 existing workers at the current Cuba site (in adjacent Allegany County) as well as add 200 additional jobs (resulting in 200 net new jobs) to its Franklinville/Farmersville location.

While facility's relocation is an economic boon for Cattaraugus County, its successful development and operation carry elements of concern for the Great Lakes Cheese Company. Infrastructure deficits will make electricity and gas connections costly for the company. Employment is a concern, as skilled employees and truck drivers (for transporting product) are challenging to find. From an agricultural perspective, dairy sales are declining nationally; and although this imposes a greater impact on fluid milk production, cheese products are not immune to the changing tides of consumption. Additionally, inflation's effect on material costs and supply-chain issues in the wake of the Covid pandemic will likely put a strain on operations and sales, if only in the relative near term.

The challenges faced by the Great Lakes Cheese Company largely mirror those of Cattaraugus County as a whole. As such, they serve to underscore areas of focus in the County's economic strategic plan.



Image: Great Lakes Cheese facility rendering, www.greatlakescheese.com

INDUSTRY CLUSTER ANALYSIS

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Key Findings: Industry Cluster Analysis

Fabricated metal product manufacturing has earning potential

This industry cluster transforms purchased metals into intermediate or end-use products through forging, stamping, bending, forming, welding, machining, and/or assembly. According to IMPLAN, in 2019, the County's cutlery, utensil, pot, and pan manufacturing sector alone generated \$272 million in economic output and \$157 million in intermediate inputs (purchases of non-durable goods and services). Given existing supply chains, private sector employment (approximately 920 jobs), a high employment LQ (3.52), and wage potential (average annual wage of \$74,260) in the County, this cluster is a significant driver of the local economy and provides potential for additional development, if local firms can find skilled labor and remain globally competitive.

Machinery manufacturing is strong with earning potential but is declining

This cluster is comprised of a broad and diverse range of machinery or components used in agriculture, mining, construction, or manufacturing. While some products, such as tractors or heaters, are finished products, others like motors are components used in further production, and some are custom-designed for a specific manufacturing process. According to IMPLAN, in 2019, the County's air and gas compressor manufacturing sector alone generated \$399 million in economic output and \$264 million in intermediate inputs. Given existing supply chains, private sector employment (approximately 840 jobs), high employment LQ (4.21), and wage potential (average annual wage of \$74,980) in the County, this cluster is a significant driver of the County's economy. However, private sector employment in this cluster contracted by 2.5 percent per year in the County from 2017 to 2021 and is expected to continue shrinking by 0.6 percent in the region through 2028.

Key Findings: Industry Cluster Analysis (continued)

Agribusiness, food processing, and technology cluster has limited earning potential

This industry cluster involves the manufacturing of food from raw produce either sold as finished products or incorporated into other manufactured goods. While this cluster has the highest employment LQ in the County (4.27), the average annual wage in this industry (\$36,450) is only slightly higher than the average wage in the County (\$36,220) and would do little to increase County household income levels. According to IMPLAN, in 2019, the tobacco product manufacturing sector alone generates \$244 million in economic output and \$67 million in intermediate inputs in the County.

Arts, entertainment, recreation, and visitor cluster has limited earning potential

Given the significant number of jobs in this cluster (approximately 2,000) and high employment LQ (3.33 employment LQ in the accommodation industry), it is a significant driver of the County's economy. While this cluster brings new wealth into the region from outside visitors, service jobs in this cluster are often part-time or seasonal and offer relatively low average annual earnings. For example, the accommodation industry provides an average annual wage of just \$20,060 in the County. The top five industries by output within this cluster (full-service restaurants; limited-service restaurants; hotels and motels, including casino hotels; all other food and drinking places; and other accommodations) currently generate approximately \$272 million in economic output and \$116 million in intermediate inputs in the County.

Key Findings: Industry Cluster Analysis (continued)

Forest and wood products cluster has mixed growth and limited earning potential

The forest and wood products cluster includes pulp and paper companies, sawmills, secondary wood product manufacturers, biomass energy firms, forest landowners and managers, loggers, equipment manufacturers and distributors, furniture makers, biomass power facilities, university programs, financial institutions, government agencies, trade associations, forest-based recreation businesses, conservation organizations, and transportation firms. While the wood product manufacturing industry has seen recent employment decline in the County from 2017 to 2021 (1.9 percent per year), the paper manufacturing industry has seen recent growth (2.8 percent per year). According to IMPLAN, in 2019, the sawmills sector alone generates \$59 million in economic output and \$47 million in intermediate inputs in the County. While high employment LQs in this cluster (as high as 3.86 in the wood product manufacturing industry) suggest this cluster will continue to remain an important component of the County's economy, the average annual wages in the two industries in this cluster (\$39,940 in paper manufacturing and \$40,870 in wood product manufacturing) are only slightly higher than the average wage in the County (\$36,220) and would do little to increase local household income levels.

Methodology: Industry Cluster Analysis

4ward Planning utilized the most recent Quarterly Census of Employment and Wages (QCEW) data (first-quarter 2017 through first-quarter 2021) provided by the Bureau of Labor statistics (BLS) and long-term employment projections (2018-2028) provided by the New York Department of Labor for the Western NY region to identify recent private employment trends and growth projections for potential industry clusters in Cattaraugus County.

Industries were considered “significant” if they shared one or more of the following characteristics:

- Employs a significant number of jobs (500 or more)
- Has an employment LQ* above 1.2, when compared to employment in the nation
- Has experienced recent (Q1 2017 to Q1 2021) annualized job growth above 0.8 percent
- Above-average growth projected for 2018-2028 for the Western NY region (above 0.8 percent)
- Has an average annual wage above the average annual wage in the County (\$35,020)

Our focus will be on traded industry clusters, those which generate revenue by selling goods and services to customers outside of the County. In contrast, other clusters, like health care services or educational services, supply the local market and exist regardless of any competitive advantages offered by a specific location. For example, although the ambulatory health care services industry is a major employer in the County, it is traditionally seen as a non-traded sector, meaning that the industry does not contribute to creating and exporting goods outside of a region.

* A location quotient compares an industry's local employment concentration to another base area (in this analysis, the nation). Location Quotient greater than 1.0 (or ~1.2) often indicate an industry is an export activity and is a link to the outside economy (brings outside \$ into the region).

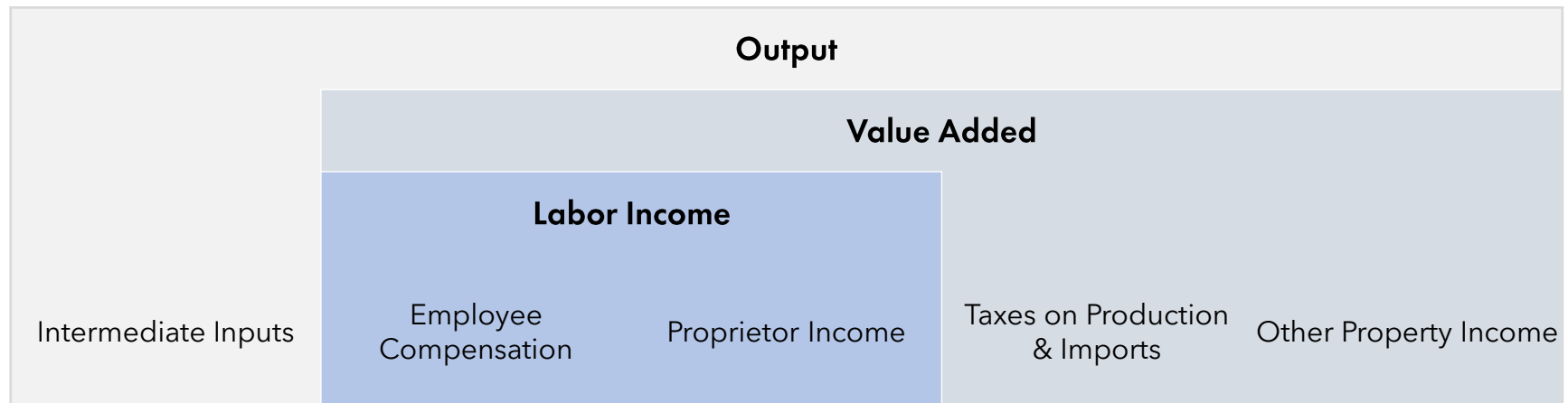
Methodology: Industry Cluster Analysis (continued)

After purchasing the most recent year of IMPLAN data available for Cattaraugus County, 4ward Planning utilized IMPLAN's economic input-output (I/O) modeling program to identify economic output, intermediate inputs (purchases of non-durable goods and services), and multipliers (employment, output, and labor income) among the top industries by output by potential cluster in the County. IMPLAN data was also utilized to identify sectors with potential for export enhancement (those with regional advantage) or import substitution (opportunities to plug economic leakages by replacing imported goods and services with locally-produced goods and services). This data will shed light on existing supply chain relationships and economic development opportunities in the County.

Interviews with knowledgeable real estate professionals were undertaken to gain perspective on the types of industries and businesses most likely to find Cattaraugus County attractive for locating/relocating or expanding operations. Key economic data findings were provided in advance of the interviews to allow for thoughtful, robust responses and unsolicited comments/ recommendations concerning the region's competitive advantages for specific industry clusters. Interviewees were also queried regarding those input factors (e.g., land, building, trained labor, incentives, service amenities, etc.) deemed most important by industries that would consider Cattaraugus County for prospective investment.

Methodology: Input-Output Relationships

IMPLAN is an input-output (I/O) software program that collects data from a variety of economic data sources to generate output, employment, and productivity for 546 industry sectors. Understanding a region's input-output (I/O) relationships that connect firms across sectors can help clarify supply chain relationships among clusters in the County. IMPLAN defines the total annual production value of each industry or commodity as Output. Intermediate Inputs + Employee Compensation + Taxes on Production and Imports, less subsidies makes up the operating expenses for a given industry. Other Property Income + Proprietor Income makes up gross operating surplus. Intermediate Inputs are purchases of non-durable goods and services (such as energy, materials, and purchased services) used to produce other goods and services, rather than for final consumption. Firms may locate close to one another to share intermediate inputs that enable them to cut production costs and increase specialization (thus making production subject to *economies of scale*). IMPLAN terminology is defined in more detail in the Appendix.



Source: IMPLAN, 2021.

Cluster Overview & Trends

Strategic Target Clusters: Southern Tier West

The Southern Tier West Region's 2020 Comprehensive Economic Development Strategy (CEDS) identifies the industry sectors ("clusters") in which the three-county region (includes Allegany, Cattaraugus, and Chautauqua Counties) has a preponderance of economic activity (strategic industry clusters). These clusters were identified through data-based location quotient analysis. According to the CEDS, the region should direct its economic development investment into these strategic target clusters to have the maximum economic impact (i.e., asset-based development). 4ward Planning highlighted "significant" industry metrics in the table on the following page, utilizing Southern Tier West Region's strategic target clusters as well as other clusters designated as "significant" in Western New York. This analysis will help identify clusters that are mature, transforming, emerging, and non-existent but could be good target clusters for Cattaraugus County.

Industry Clusters: Southern Tier West, 2020



Source: Southern Tier West Regional Planning and Development Board, 2020 Southern Tier West Region: Comprehensive Economic Development Strategy, September 2020

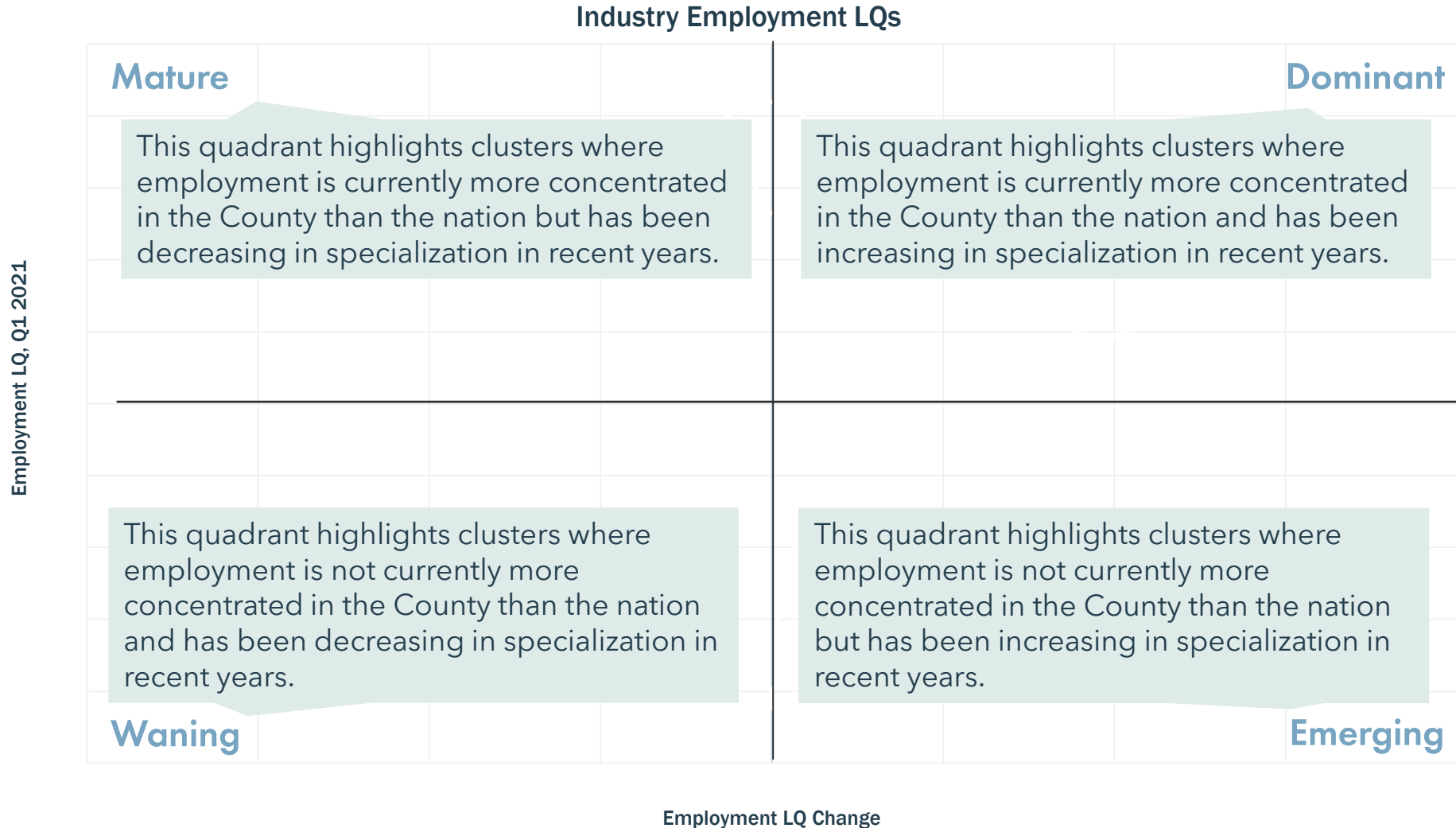
Industry Clusters Analysis: Cattaraugus County

	Industry Clusters	Subclusters		Q1, 2021		Net Change, 2017-2021		Projected % Change in Jobs: Western NY, 2018-2028	Average Annual Wage, 1Q 2021	Industry is Significant?
		NAICS Code	NAICS Industry Name	Private Jobs	Employment LQ	% Annualized Job Change	Employment LQ			
Strategic Target Clusters: Southern Tier West	Agribusiness, Food Processing and Technology	111	Crop Production	28	0.32	4.2%	0.06	0.5%	\$28,440	G
		112	Animal Production and Aquaculture	214	4.27	8.4%	1.26	1.3%	\$36,450	LQ, G, P, W
		311	Food Manufacturing	140	0.45	3.0%	0.06	0.2%	\$46,590	G, W
	Forest and Wood Products	321	Wood Product Manufacturing	298	3.86	-1.9%	-0.12	1.0%	\$40,870	LQ, P, W
		322	Paper Manufacturing	118	1.75	2.8%	0.36	-1.4%	\$39,940	LQ, G, W
	Glass and Ceramics	327	Nonmetallic Mineral Product Manuf.	21	0.28	NA	0.28	-0.3%	\$34,370	-
	Fabricated Metal Product Manufacturing	332	Fabricated Metal Product Manufacturing	918	3.52	3.6%	0.77	-0.1%	\$74,260	J, LQ, G, W
	Machinery Manufacturing	333	Machinery Manufacturing	838	4.21	-2.5%	-0.02	-0.6%	\$74,980	J, LQ, W
	Arts, Entertainment, Recreation, and Visitor Industries	722	Food Services and Drinking Places	2,004	1.13	0.0%	0.27	0.2%	\$20,330	J
		713	Amusement, Gambling, and Recreation Industries	290	1.36	-10.7%	-0.32	0.1%	\$17,370	LQ
721		Accommodation	762	3.33	-4.3%	0.96	0.1%	\$21,060	J, LQ	
Target clusters: Western NY	Professional and Business Services	541	Professional, Scientific, and Technical Services	454	0.25	-1.0%	-0.01	1.1%	\$45,240	J, P, W
		551	Management of Companies and Enterprises	144	0.32	-2.4%	-0.02	0.7%	\$47,420	J, P, W
	Financial Services	522	Credit Intermediation and Related Activities	537	1.04	0.7%	0.08	0.6%	\$53,660	J, W
	Construction	238	Specialty Trade Contractors	368	0.43	0.3%	0.01	0.8%	\$52,780	P,W
	Health Care and Social Assistance	621	Ambulatory health care services	1,020	0.69	4.3%	0.10	3.9%	\$49,400	J, P,W
		623	Nursing and Residential Care Facilities	864	1.46	-1.7%	0.11	1.7%	\$32,240	J, LQ,P
624		Social Assistance	421	0.56	-4.2%	-0.11	2.1%	\$24,440	P	
							0.8%	\$36,220		

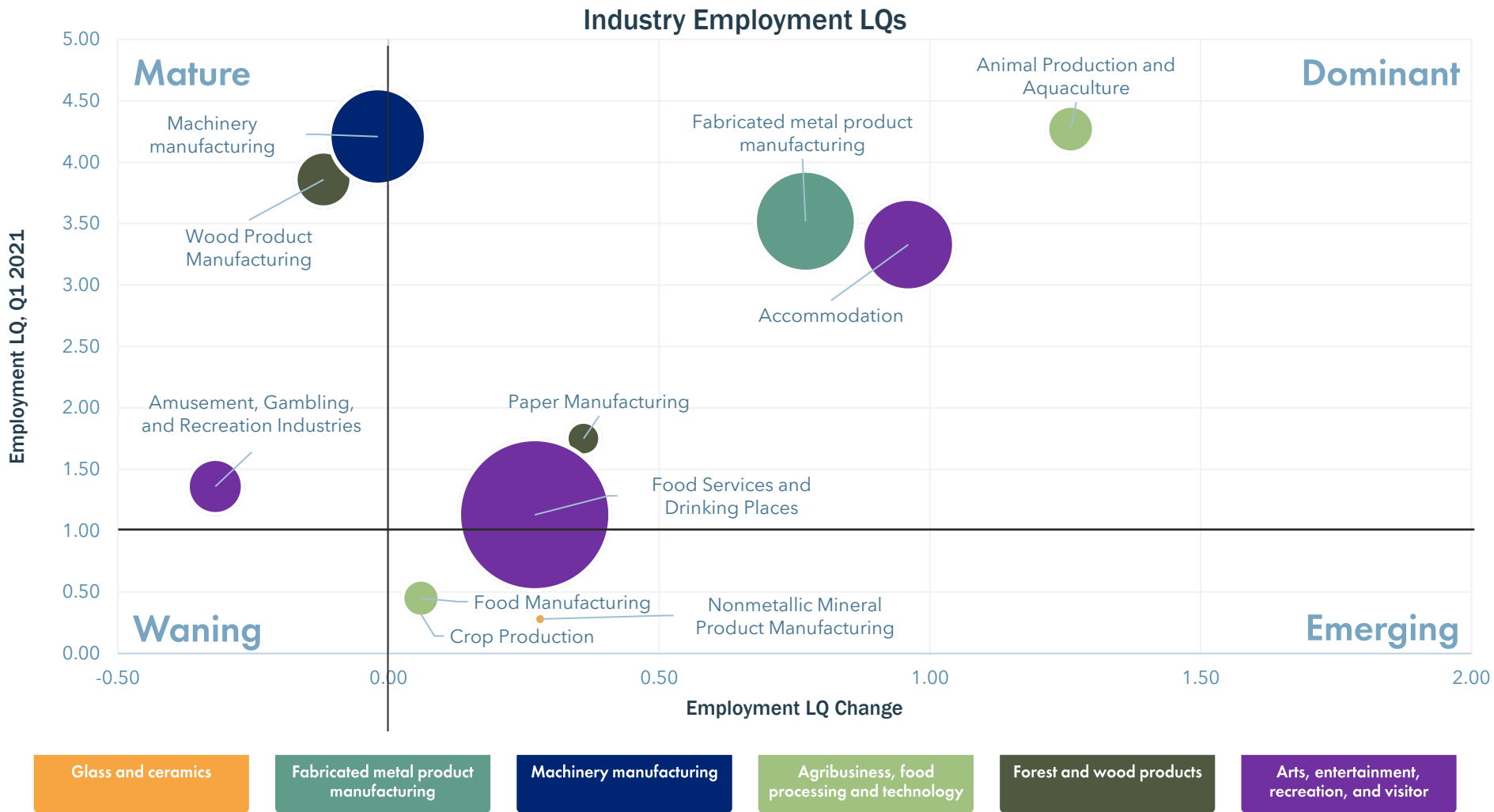
Key: **J: Industry employs a significant number of jobs (>500); **LQ**: Industry has an employment LQ above 1.2, when compared to employment in the nation; **G**: Industry experienced recent annualized job growth above 0.8%; **P**: Above-average growth projected for 2018-2028 for the Western NY region (0.8 percent); **W**: Industry pays above-average annual wage in the County (\$35,020)

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, New York Department of Labor & Industry, 2018-2028 Long-Term Projections

Strategic Industry Clusters: Cattaraugus County

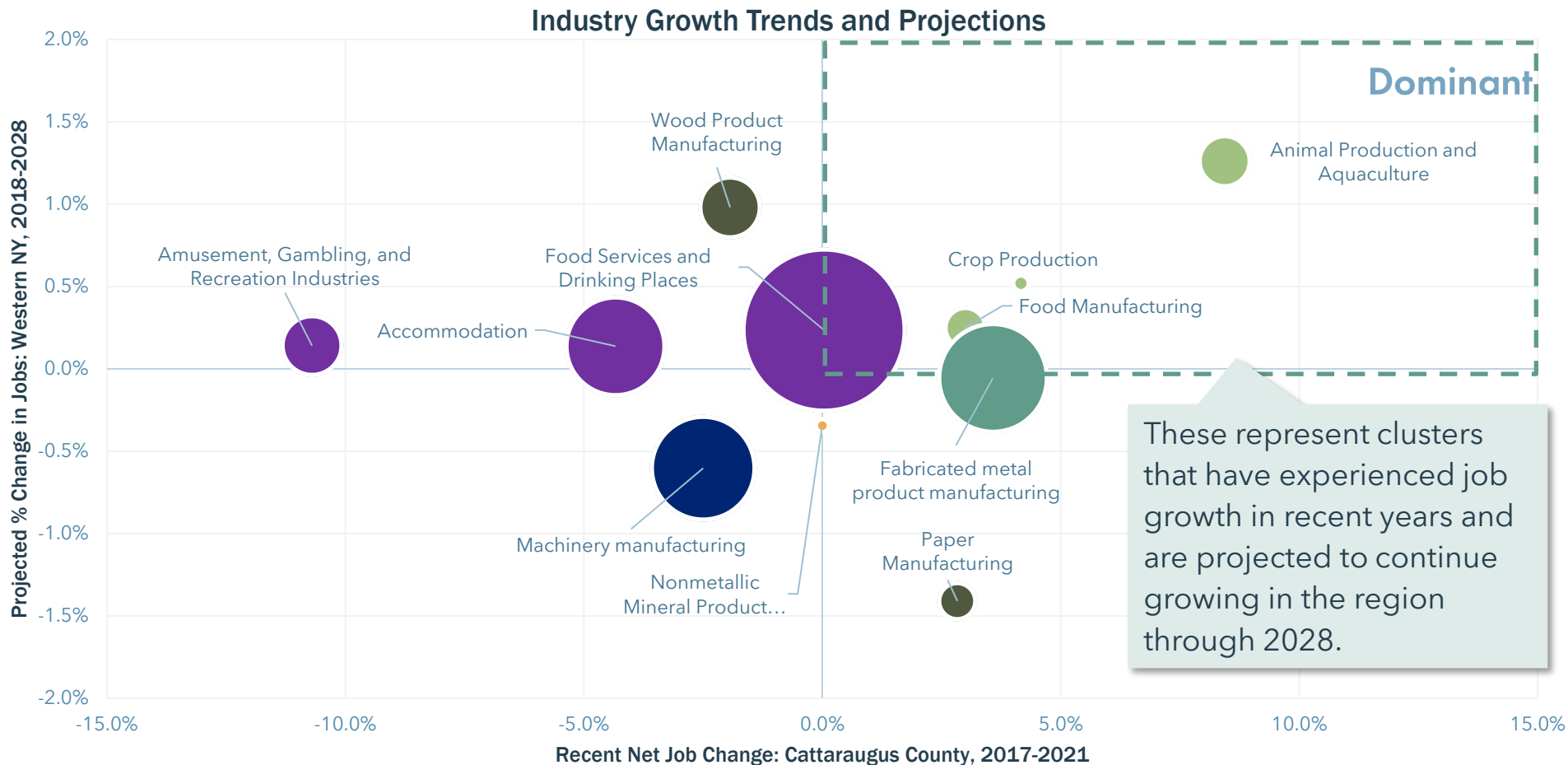


Strategic Industry Clusters: Cattaraugus County



Bubble size represents private jobs by industry within Cattaraugus County as of first-quarter 2021.
 Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Industry Growth Trends and Projections

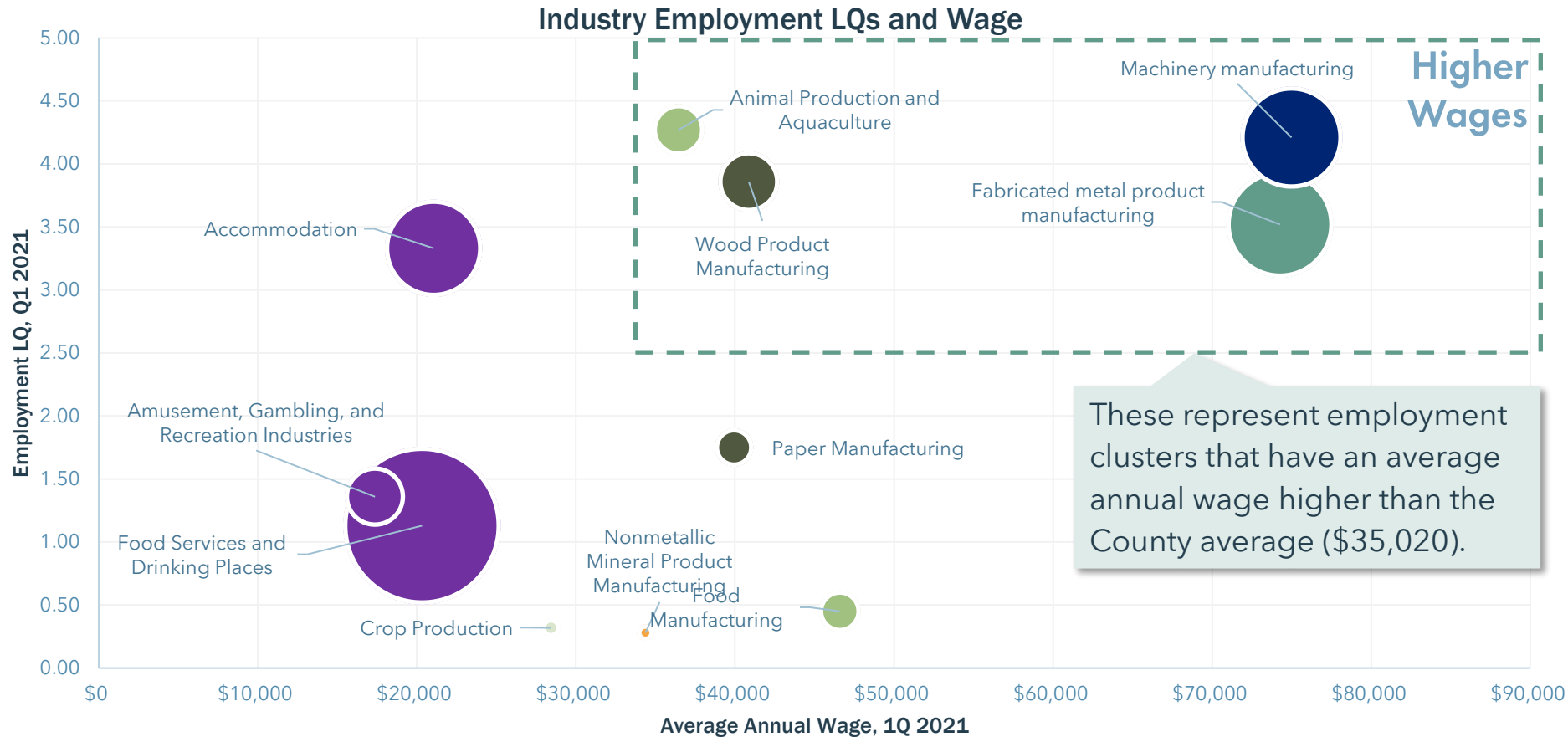


These represent clusters that have experienced job growth in recent years and are projected to continue growing in the region through 2028.

- Glass and ceramics
- Fabricated metal product manufacturing
- Machinery manufacturing
- Agribusiness, food processing and technology
- Forest and wood products
- Arts, entertainment, recreation, and visitor

Bubble size represents private jobs by industry within Cattaraugus County as of first-quarter 2021.
 Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics; New York Department of Labor & Industry, 2018-2028 Long-Term Projections.

Industry Growth Trends and Projections (continued)



Glass and ceramics	Fabricated metal product manufacturing	Machinery manufacturing	Agribusiness, food processing and technology	Forest and wood products	Arts, entertainment, recreation, and visitor
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Bubble size represents private jobs by industry within Cattaraugus County as of first-quarter 2021.

Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics; New York Department of Labor & Industry, 2018-2028 Long-Term Projections.

Cluster Summaries

Fabricated Metal Product Manufacturing

The fabricated metal product manufacturing industry cluster transforms purchased metals into intermediate or end-use products through forging, stamping, bending, forming, welding, machining, and/or assembly. Because of the specialized processes involved for individual parts, most companies make a limited range of products. Given the significant number of County jobs in this industry (approximately 920 jobs), high employment LQ (3.52), and wage potential (average annual wage of \$74,260), this cluster is a significant driver of the County's economy and offers potential for additional development, provided that companies can remain globally competitive, incorporating new technologies and a growing market base. As presented in the table below, the cutlery, utensil, pot, and pan manufacturing sector alone generates \$272 million in economic output and \$157 million in intermediate inputs in the County.

Top 5 Fabricated Metal Product Manufacturing Cluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
233	Cutlery, utensil, pot, and pan manufacturing	\$272.35	\$157.11	1.11	1.16	1.13
216	Iron, steel pipe and tube manuf. from purchased steel	\$30.08	\$25.92	1.13	1.17	1.14
246	Spring and wire product manufacturing	\$24.89	\$16.36	1.18	1.20	1.17
237	Plate work manufacturing	\$21.73	\$12.81	1.21	1.23	1.19
239	Sheet metal work manufacturing	\$21.69	\$12.72	1.19	1.21	1.18
		\$370.75	\$224.92			

Source: IMPLAN, 2021

Machinery Manufacturing

The machinery manufacturing industry cluster is comprised of a broad and diverse range of machinery or components used in agriculture, mining, construction, or manufacturing. While some products, such as tractors or heaters, are finished products, others like motors are components used in further production, and some are custom-designed for a specific manufacturing process. Machinery manufacturing involves producing and assembling components including forging, machining, and welding activities which require skilled labor. According to IMPLAN, in 2019, the air and gas compressor manufacturing sector alone generates \$399 million in economic output and \$264 million in intermediate inputs in the County. Given existing supply chains, private sector employment (approximately 840 jobs), high employment LQ (4.21), and wage potential (average annual wage of \$74,980), this cluster is a significant driver of the County's economy. However, private sector employment in this cluster contracted by 2.5 percent per year in the County from 2017 to 2021 and is expected to continue shrinking by 0.6 percent in the region through 2028.

Top 5 Machinery Manufacturing Cluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
286	Air and gas compressor manufacturing	\$398.73	\$264.24	1.12	1.16	1.14
337	Wiring device manufacturing	\$28.08	\$22.21	1.15	1.18	1.15
314	Industrial process variable instruments manufacturing	\$17.20	\$12.23	1.15	1.19	1.15
308	Capacitor, resistor, coil, transformer, and other inductor manuf.	\$11.77	\$8.68	1.21	1.23	1.19
291	Power-driven hand tool manufacturing	\$9.13	\$7.05	1.09	1.14	1.10
	Total	\$345.92	\$139.79			

Source: IMPLAN, 2021

Agribusiness, Food Processing and Technology

The agribusiness, food processing and technology industry cluster involves the manufacturing of food from raw produce either sold as finished products or incorporated into other manufactured goods. Core industries in this cluster drive employment and inputs in other industries which supply them (e.g., crop production, animal production and aquaculture, and food manufacturing), as well as those which support the core industries by providing business finance and various business services. According to the Southern Tier West Region's CEDS, this cluster is poised for additional development, owing to the trend toward increased utilization of locally grown and processed foods, with shorter transportation distances (lower cost to the end customer) presenting a comparative advantage. While the high employment LQ in the animal production and aquaculture industry (4.27), in particular, indicates that the County's labor force has a concentration of workers that would permit further expansion of this industry, the average annual wage in this industry (\$36,450) is only slightly higher than the County's average wage. According to IMPLAN, in 2019, the tobacco product manufacturing sector alone generated \$244 million in economic output and \$67 million in intermediate inputs in the County (although this industry employs very few people).

Top 5 Agribusiness, Food Processing & Technology Cluster Industries by Total Output: Cattaraugus Co.

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
109	Tobacco product manufacturing	\$243.86	\$66.75	1.02	1.07	0.42
12	Dairy cattle and milk production	\$62.89	\$46.89	1.17	1.20	1.16
93	Bread and bakery product, except frozen, manufacturing	\$18.37	\$10.40	1.25	1.27	1.21
95	Dry pasta, mixes, and dough manufacturing	\$13.30	\$10.83	1.24	1.26	1.21
106	Breweries	\$7.49	\$4.92	1.13	1.17	1.15
	Total	\$345.92	\$139.79			

Source: IMPLAN, 2021

Industry Subclusters: Agribusiness, Food Processing & Tech.

Top 4 Animal Production and Aquaculture Subcluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
12	Dairy cattle and milk production	\$62.89	\$46.89	1.17	1.20	1.16
11	Beef cattle ranching and farming, including feedlots and dual-purpose ranching and farming	\$7.16	\$3.65	1.20	1.22	1.18
14	Animal production, except cattle and poultry and eggs	\$1.90	\$0.06	1.01	1.02	0.00
13	Poultry and egg production	\$0.57	\$0.47	1.10	1.15	1.11
		\$72.53	\$51.07			

Top 5 Crop Production Subcluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
10	All other crop farming	\$7.25	\$1.89	1.17	1.19	1.16
2	Grain farming	\$4.80	\$1.45	1.07	1.12	1.10
6	Greenhouse, nursery, and floriculture production	\$2.24	\$0.53	1.09	1.15	1.10
3	Vegetable and melon farming	\$1.32	\$0.34	1.08	1.12	1.10
4	Fruit farming	\$1.15	\$0.02	1.03	1.07	0.98
		\$16.76	\$4.23			

Top 5 Food Manufacturing Subcluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
109	Tobacco product manufacturing	\$243.86	\$66.75	1.02	1.07	0.42
93	Bread and bakery product, except frozen, manufacturing	\$18.37	\$10.40	1.25	1.27	1.21
95	Dry pasta, mixes, and dough manufacturing	\$13.30	\$10.83	1.24	1.26	1.21
106	Breweries	\$7.49	\$4.92	1.13	1.17	1.15
64	Other animal food manufacturing	\$3.61	\$3.20	1.20	1.21	1.18
		\$286.63	\$96.10			

Source: IMPLAN, 2021

Arts, Entertainment, Recreation, and Visitor Industries

The County has several assets that provide tourism opportunities, including outdoor recreational areas, sporting and recreational events, cultural institutions (e.g., universities and colleges, museums and galleries, localized historical and cultural facilities, arts festivals). Given the significant number of jobs in the food services and drinking places industry (approximately 2,000 jobs) and high employment LQ in the accommodation industry (3.33 employment), the tourism cluster (more formally, the “arts, entertainment, recreation and visitor industries” cluster) is a significant driver of the County’s economy. While the tourism cluster brings new wealth into the region from outside visitors, service jobs in this cluster are often part-time or seasonal and provide relatively low average annual earnings. For example, the accommodation industry provides an average annual wage of just \$20,060 in the County. As presented in the table below, the top five industries by output within this cluster currently generate approximately \$272 million in economic output and \$116 million in intermediate inputs (purchases of non-durable goods and services) in the County.

Top 5 Arts, Entertainment, Recreation, and Visitor Cluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
509	Full-service restaurants	\$90.85	\$40.65	1.29	1.30	1.25
510	Limited-service restaurants	\$68.83	\$35.70	1.34	1.31	1.27
507	Hotels and motels, including casino hotels	\$56.08	\$20.91	1.26	1.27	1.22
511	All other food and drinking places	\$41.51	\$14.29	1.27	1.28	1.23
508	Other accommodations	\$15.29	\$4.23	1.35	1.31	1.27
		\$272.56	\$115.79			

Source: IMPLAN, 2021.

Forest and Wood Products

The forest and wood products cluster includes pulp and paper companies, sawmills, secondary wood product manufacturers, biomass energy firms, forest landowners and managers, loggers, equipment manufacturers and distributors, furniture makers, biomass power facilities, university programs, financial institutions, government agencies, trade associations, forest-based recreation businesses, conservation organizations, and transportation firms. While the County's wood product manufacturing industry has seen recent employment decline from 2017 to 2021 (1.9 percent per year), the paper manufacturing industry has seen recent growth (2.8 percent per year). Although high employment LQs in this cluster (as high as 3.86 in the wood product manufacturing industry) suggest that this cluster will continue to be an important component of the County's economy, the average annual wages in the two industries in this cluster (\$39,940 in paper manufacturing and \$40,870 in wood product manufacturing) are only slightly higher than the County's average wage (\$36,220) and would do little to increase household income levels. As presented in the table below, the sawmills sector alone generates \$59 million in economic output and \$47 million in intermediate inputs in the County.

Top 5 Forest and Wood Products Cluster Industries by Total Output: Cattaraugus County

IMPLAN Code	IMPLAN Description	Dollars (Millions)			Multipliers	
		Output	Intermediate Inputs	Employment	Output	Labor Income
132	Sawmills	\$58.94	\$47.28	1.37	1.33	1.29
138	Cut stock, resawing lumber, and planing	\$24.69	\$18.19	1.26	1.28	1.22
147	Paperboard container manufacturing	\$20.08	\$16.46	1.13	1.17	1.15
151	All other converted paper product manufacturing	\$18.19	\$14.90	1.20	1.22	1.18
143	All other miscellaneous wood product manufacturing	\$6.37	\$4.75	1.34	1.31	1.27
		\$128.28	\$101.58			

Source: IMPLAN, 2021

Opportunities for Export Enhancement & Import Substitution

Methodology: Export Enhancement & Import Substitution

Economic development usually focuses on either export enhancement or import substitution. Export enhancement focuses on investing in existing industries with existing regional advantage and ripple effects (e.g., high multipliers), while import substitution refers to replacing imported goods and services with goods and services produced in the local community in order to plug economic leakages. In IMPLAN, where *Net Commodity Supply* greatly exceeds *Total Gross Commodity Demand* in a given region, there is a regional advantage and where *Total Gross Commodity Demand* greatly exceeds *Net Commodity Supply* there is an opportunity for import substitution.

- **Commodity:** A product or service that may be produced by one or multiple Industries or institutions. Commodity Output represents the total value of production of that product or service, regardless of the Industry or Institution that produced it.
- **Net Commodity Supply:** Total Commodity Supply less foreign exports of the Commodity from the region.
- **Total Gross Commodity Demand:** Equals Intermediate Commodity Demand (total demand for this Commodity by Industries) plus Institutional Commodity Demand (total demand for this Commodity by Institutions). The term “gross” refers to the fact that these figures include demand for the Commodity that is met by imports (both foreign and domestic).
- **Supply/Demand Ratio (S/D Ratio):** The domestic supply/demand ratio is the percentage of total local demand for the Commodity that could be met by local production net of foreign exports. It is calculated by dividing net commodity supply by total gross commodity demand, constrained to a maximum of 100 percent.

Source: IMPLAN, 2021

Industry Clusters: Regional Advantage

The table below presents the top 10 existing commodities with regional advantage in the County, or where *Net Commodity Supply* greatly exceeds *Total Gross Commodity Demand*. Not surprisingly, many of these commodities are serving existing clusters in the County, such as machinery manufacturing, fabricated metal product manufacturing, and agribusiness, food processing and technology, and forest and wood products. Most notably, in the County, *Net Commodity Supply* greatly exceeds *Total Gross Commodity Demand* by \$283 million in the air and gas compressors sector.

Top 10 Commodities by Regional Advantage: Cattaraugus County

IMPLAN Description (Cluster)	Dollars (Millions)			Ratio
	Net Commodity Supply	Total Gross Commodity Demand	Difference	Domestic S/D Ratio
Air and gas compressors (Machine)	\$384.96	\$13.56	\$282.76	100.0%
Cutlery, utensils, pots, and pans (Metal)	\$259.24	\$2.56	\$238.53	100.0%
Cigarettes, cigars, smoking and chewing tobacco, and reconstituted tobacco (Food)	\$243.81	\$22.71	\$221.24	100.0%
Plastics materials and resins (Advance Materials)	\$148.42	\$22.83	\$91.62	100.0%
Waste management and remediation services	\$92.18	\$62.54	\$63.23	100.0%
Monetary authorities and depository credit intermediation	\$229.33	\$157.83	\$62.14	100.0%
Dairy cattle and milk products (Food)	\$61.91	\$0.01	\$61.90	100.0%
Dimension lumber (Wood)	\$71.65	\$24.72	\$42.37	100.0%
Other products and services of Local Govt enterprises	\$67.66	\$29.27	\$38.38	100.0%
Asphalt paving mixtures and blocks (Construction)	\$26.38	\$5.43	\$20.86	100.0%
	\$1,585.53	\$341.46	\$1,123.03	

Notes: Machinery Manufacturing (Machine), Fabricated Metal Product Manufacturing (Metal), Agribusiness, Food Processing and Technology (Food), and Forest and Wood Products (Wood)

Source: IMPLAN, 2021

Industry Clusters: Import Substitution Opportunities

The table below presents the top 10 commodities in the County that present potential import substitution opportunities, or where *Total Gross Commodity Demand* greatly exceeds *Net Commodity Supply*. These commodities generally serve clusters not currently present in the County such as health care and social assistance, professional and business services, energy, and information technology and telecommunications. These imported goods and services could be potentially replaced with locally-produced commodities, which could plug existing economic leakages in the County. These commodities only work as starting points, however, as if the County can't extract oil, there is not much the County can do to produce this commodity locally. Most notably, in the County, *Total Gross Commodity Demand* exceeds *Net Commodity Supply* by \$149 million in the *Hospital Services* sector.

Top 10 Commodities by Opportunity for Import Substitution: Cattaraugus County

IMPLAN Description	Dollars (Millions)			Ratio Domestic S/D Ratio
	Net Commodity Supply	Total Gross Commodity Demand	Difference	
Hospital services (Health)	\$124.53	\$273.68	\$149.15	45.4%
Refined petroleum products (Energy)	\$0.11	\$144.22	\$144.11	0.1%
Pharmaceuticals (Health)	\$0.01	\$111.94	\$111.93	0.0%
Other insurance (Business)	\$59.00	\$160.80	\$101.80	35.5%
Management of companies and enterprises (Business)	\$21.93	\$124.29	\$102.35	17.5%
Custom computer programming services (IT)	\$8.05	\$89.89	\$81.84	6.2%
Other financial investment services (Business)	\$16.14	\$77.43	\$61.28	19.0%
Wholesale services - Other nondurable goods merchant wholesalers	\$21.56	\$82.18	\$60.62	24.4%
Wireless telecommunications (except satellite) (IT)	\$0.06	\$60.97	\$60.91	0.1%
Wired telecommunications (IT)	\$25.01	\$83.69	\$58.69	29.1%
	\$276.41	\$1,209.09	\$932.68	

Health Care and Social Assistance (Health), Professional and Business Services (Business), Information Technology and Telecommunications (IT)
Source: IMPLAN, 2021

POTENTIAL DEVELOPMENT/ REDEVELOPMENT PARCELS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Methodology: Potential Growth Area Metrics

While this study has focused its recommendations on communities within Cattaraugus County which have exhibited relatively consistent and sizeable economic activity over the past twenty years (e.g., Olean and Ellicottville), we recognize there are several other local jurisdictions that are eager for new private investment. One of these, Franklinville, is getting such investment with announcement of the \$500 million Great Lakes Cheese factory. However, these types of large-scale investments in rural areas are often the exception and not the rule. Indeed, the securing the Great Lakes Cheese Company in Franklinville is a major coup, given the surrounding area's relatively small labor pool (a key reason the Great Lakes Cheese Company is staying in the region (relocating from the village of Cuba) is to maintain its existing labor force, while also increasing its labor force by 200 or more jobs).

Notwithstanding Franklinville's securing the Great Lakes Cheese Company, communities in the county, such as the town of Randolph, and villages of Cattaraugus, Little Valley and Franklinville will be challenged to create large scale investment opportunities, due to a number of factors: limited interstate highway access; a small and declining population and labor force; and/or limited water and sewer capacity. This is not to say that no private economic development will occur in these communities; to the contrary, local residents who have entrepreneurial ambitions will always come up with new business concepts to satisfy an unmet demand for a good or service. However, the scale of such business investment will be relatively small and will not, likely, be a catalyst for much additional private investment.

Accordingly, the County and its allied economic development organizations should continue to support local entrepreneurship in all areas of the County, but particularly in the aforementioned communities, via technical training, financing assistance and job training, where necessary.

Methodology: Potential Growth Area Metrics

The table below compares potential growth metrics for the five-mile radius area around each community.

Key Metric	5-Mile Radius Areas					
	City of Olean	Town of Randolph	Village of Franklinville	Village of Cattaraugus	Village of Little Valley	Village of Ellicottville
Total Population (2021)	22,989	4,356	3,749	2,833	2,822	2,532
Persons per Square Mile (2021)	292.7	55.5	47.7	36.1	35.9	32.2
Historic Pop Growth (2010-2021)	-0.55%	-0.41%	-0.28%	-0.49%	-0.50%	0.13%
Projected Pop Growth (2021-2026)	-0.63%	-0.64%	-0.46%	-0.63%	-0.65%	-0.28%
Primary Jobs (2019)	12,003	890	558	255	1,585	1,420
Primary Jobs per Square Mile (2019)	152.8	11.3	7.1	3.2	20.2	18.1
Available Infrastructure	Water: ~83 mi Sewer: ~86 mi	Water: ~12 mi Sewer: ~4 mi	Water: ~11 mi Sewer: ~7 mi	Water: ~11 mi Sewer: ~4 mi	Water: ~11 mi Sewer: ~8 mi	Water: ~15 mi Sewer: ~25 mi
	Broadband (>99 Mbps): 66.9 sq mi	Broadband (>99 Mbps): 31.5 sq mi	Broadband (>99 Mbps): 51.6 sq mi	Broadband (>99 Mbps): 61.8 sq mi	Broadband (>99 Mbps): 45.3 sq mi	Broadband (>99 Mbps): 62.0 sq mi
Arterial Roadway Accessibility (total length within 5-mile radius)	49.1 mi along Southern Tier Expy (I-86) and Routes 417, 83, 16, and others	22.5 mi along Southern Tier Expy (I-86)	10.7 mi along Route 16	10.6 via Route 353	10.6 mi along Route 353	11.5 mi along Route 219
Airport Accessibility (distance to Buffalo-Niagara International Airport (BUF) and Bradford Regional Airport (BFD))	~74 mi to BUF ~30 mi to BFD	~64 mi to BUF ~45 mi to BFD	~55 mi to BUF ~50 mi to BFD	~52 mi to BUF ~50 mi to BFD	~57 mi to BUF ~43 mi to BFD	~53 mi to BUF ~41 mi to BFD

Note: Length of water and sewer lines is indicative of how widespread these systems are (i.e., not capacity), with Olean and Ellicottville having the most extensive systems.
Source: Esri, U.S. Census Bureau, Center for Economic Studies, LEHD

Methodology: Existing Policy Recommendations

The County's Vision 2025 Comprehensive Plan and the Western New York Regional Economic Development Council's (WNYREDC) 2011 Strategic Plan were searched for all (re)development recommendations pertaining to the City of Olean, Village of Ellicottville, Village of Franklinville, Village of Little Valley, Town of Randolph, and Village of Cattaraugus.

- **Olean:** Vision 2025 restated several priority projects from the 2013 Comprehensive Economic Development Strategy: (1) Walkable Olean North Union Street, (2) Wastewater Treatment Plant Upgrade, (3) Bradner Stadium Renovation, (4) Bicycle and Pedestrian Crossing Project, (5) Forness Park Pedestrian and Bicycle Path, (6) Olean Property Improvement Program, (7) Rehab Center Development, and (8) Olean Workforce Housing. Vision 2025 also identified the following as a strategy for achieving its vision: "Support efforts by STERA to construct an intermodal, rail/truck transload facility at the Olean Yard." The City of Olean was the only municipality of these six that received direct recommendations in the 2011 WNY REDC Strategic Plan including: (1) the reconstruction of East State Street, and (2) the redevelopment of properties in Olean's Central Business District, specifically 101 and 107 North Union Street and 110 and 116 West State Street.
- **Ellicottville:** Vision 2025 identified the following recommendation from the 1996 Local Land Use and Infrastructure Study: "Locating the proposed US Route 219 freeway and interchanges to relieve truck traffic."
- **Randolph:** Vision 2025 restated several priority projects from the 2013 Comprehensive Economic Development Strategy including the (1) McNallie Building Phase 1 Renovation Project.

Methodology: Potential Development/Redevelopment Parcels

In collaboration with B&L, 4ward Planning crafted development recommendations for the City of Olean and Village of Ellicottville. Of the 43 municipalities in Cattaraugus County, these two municipalities were prioritized based on both local needs and economic development potential. The selection process that resulted in the identification of the City of Olean and Village of Ellicottville included a county-wide mapping exercise and review of the following report sections' findings:





1. Stakeholder Outreach & SWOT Analysis
2. Socio-Economic Analysis
3. Tourism Infrastructure & Trends
4. Real Estate Analysis
5. Labor & Industry Trends
6. Industry Cluster Analysis

The county-wide mapping exercise analyzed location-specific obstacles and opportunities for (re)development efforts, including agricultural districts, conservation and outdoor recreation areas, 100-year floodplains, the availability of public water and sewer, and access to broadband (see map on following page). A number of other factors were also reviewed, including the location of transportation routes, recreational trails, cell towers, and major financial incentive zones. These maps are located in the Appendix.

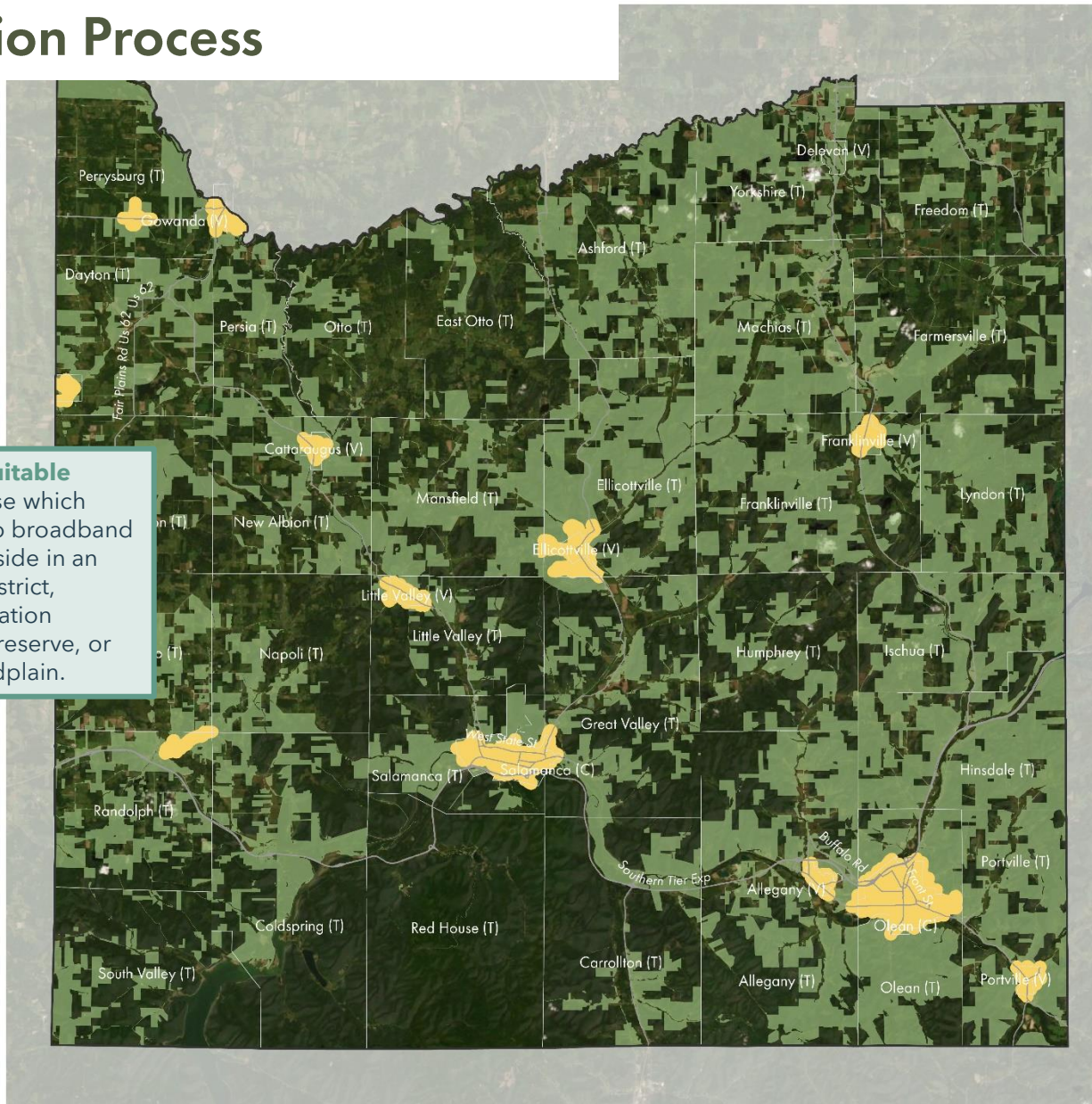
Selection Process

POTENTIAL AREAS FOR (RE)DEVELOPMENT

Cattaraugus County

-  County Boundary
-  Municipal Boundary
-  Arterial Road
-  Known Water & Sewer Infrastructure
-  Potentially Suitable Area

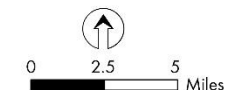
Potentially suitable areas are those which have access to broadband and do not reside in an agricultural district, outdoor recreation area/nature preserve, or 100-year floodplain.



Data Sources

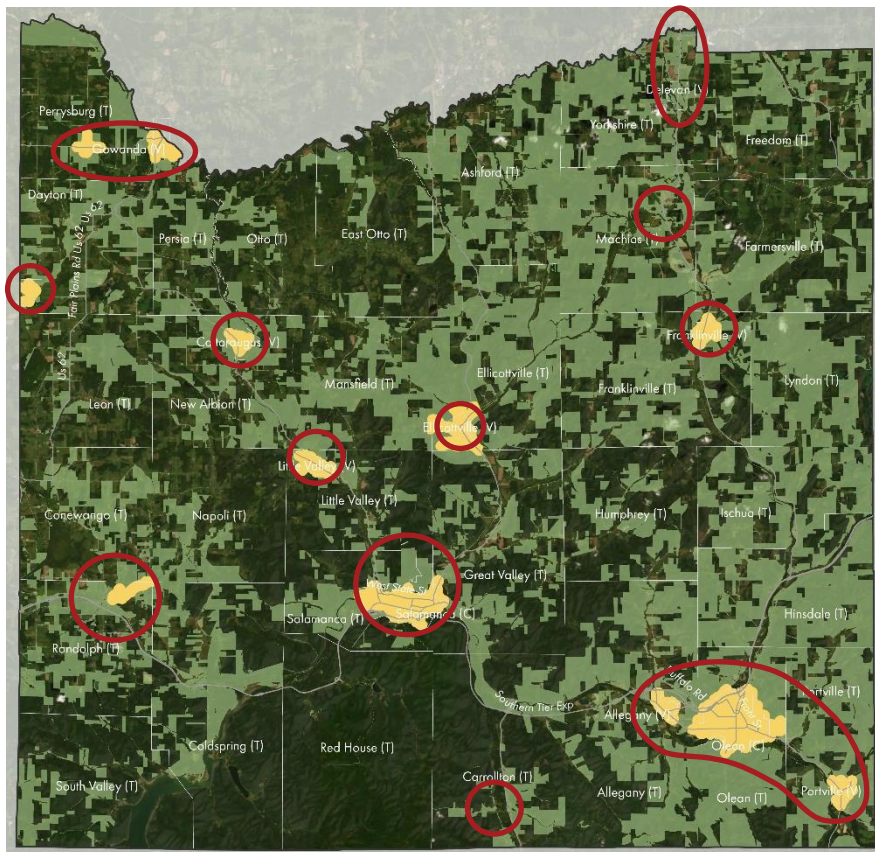
Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 Cornell IRIS & NYS Dept. of Agriculture & Markets (2017), Agricultural Districts
 Federal Communications Commission (2020), NY - Fixed - Jun 19v1
 FEMA (1996), Q3 Flood Data
 NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries
 Southern Tier West RPDB (n.d.), CattaCoUtility
 US Census Bureau (2020), fl_2020_36_tabblock10

Note: References for all water and sewer GIS data available upon request.

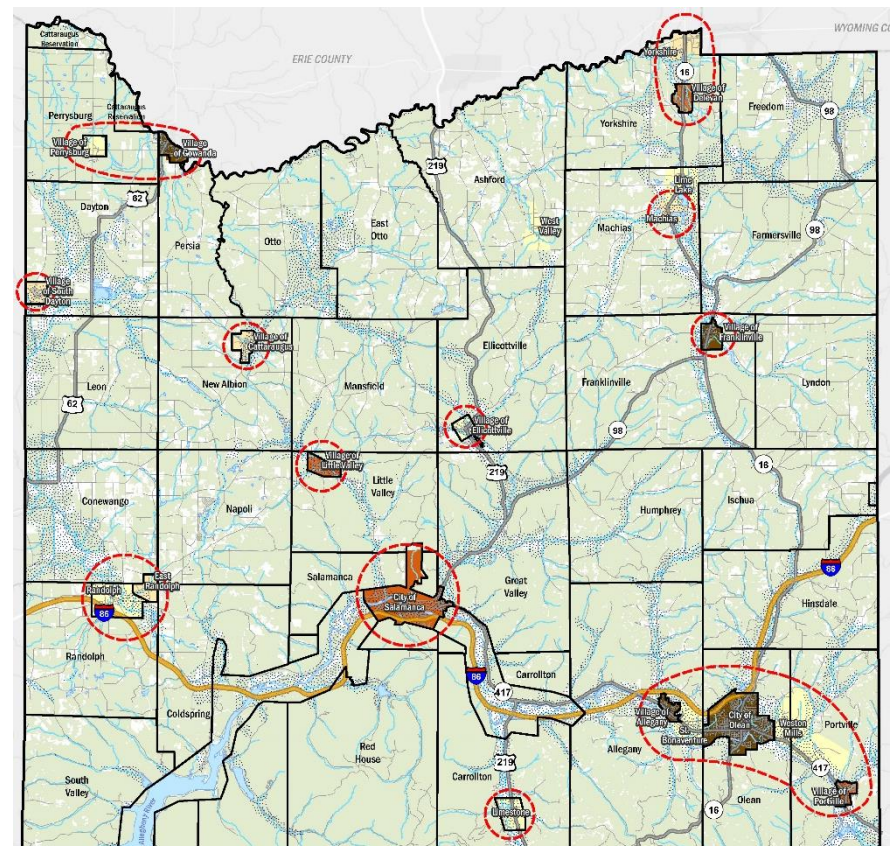


Selection Process

The areas identified as potentially suitable (re)development locations are largely in alignment with the future growth areas designated in the County's Vision 2025 Comprehensive Plan. For the most part, the future growth areas encompass the County's cities and villages, including the City of Olean and Village of Ellicottville. The County recommends prioritizing development within these established centers.



Note: Full map available on [pg. XX](#)



Source: Cattaraugus County & Wendel, 2015 (full map available on [pg. 14](#))

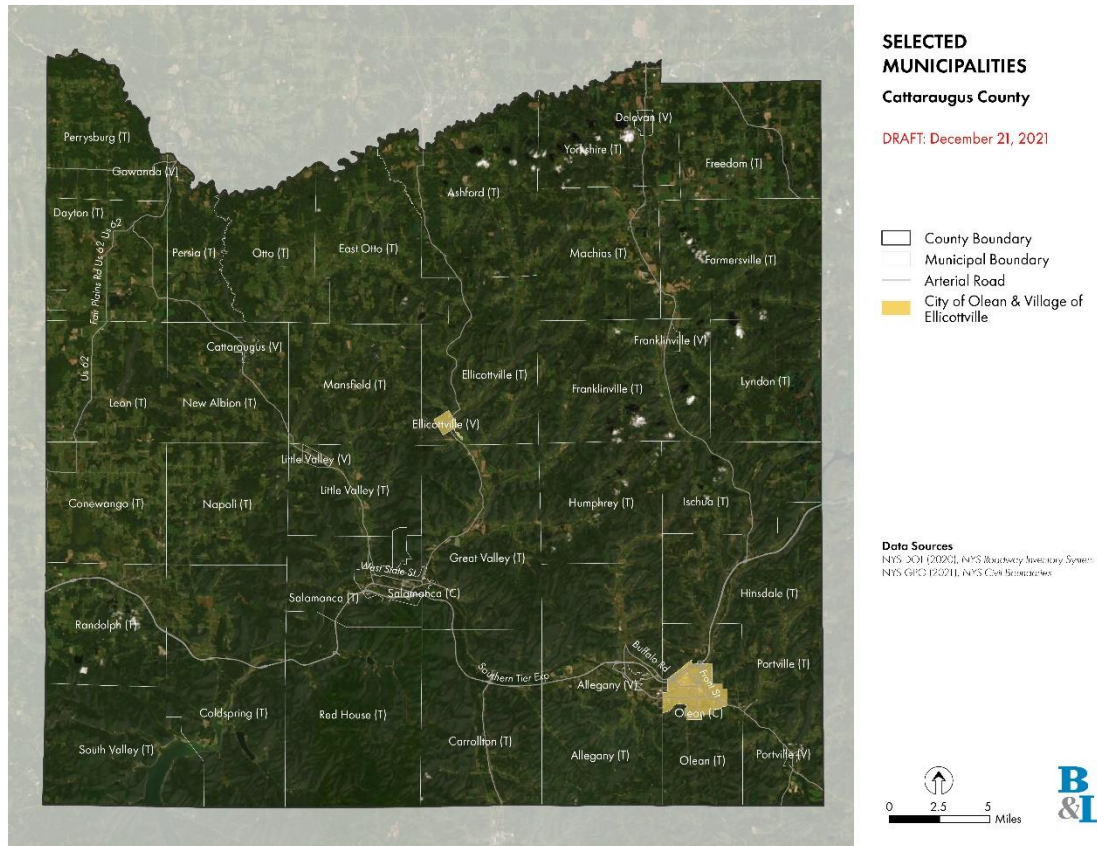
Selection Process

By comparing the County's future growth areas and the GIS-based development suitability analysis, the following were identified as key locations to consider (re)development opportunities:

1. City of Olean
2. City of Salamanca
3. Village of Allegany
4. Village of Cattaraugus
5. Village of Ellicottville
6. Village of Franklinville
7. Village of Gowanda
8. Village of Little Valley
9. Village of Portville
10. Village of South Dayton
11. Town of Randolph (former Villages of Randolph and East Randolph)

After reviewing previous plans and studies, input from stakeholders, and key findings from this report's economic and market analyses, the

City of Olean and **Village of Ellicottville** surfaced as priority locations for an in-depth review of (re)development potential. The following pages explore sites in these two municipalities that could be ready for (re)development in the near- and long-term.



Methodology: Potential Development/Redevelopment Parcels (continued)

In order to identify underutilized land and prospective redevelopment sites within the City of Olean and Village of Ellicottville, 4ward Planning and B&L performed an Improvement-to-Land Value (ILV) analysis utilizing the latest version of Esri ArcMap and Cattaraugus County tax assessor GIS data. This analysis allowed the team to map and identify potential large commercial and industrial parcels within the county (at least five-acres in size) that present the most likely redevelopment/development opportunities (based on market receptivity previously identified).

This analysis provides the appropriate foundation for identifying and evaluating strategic investment projects and developing a plan of action to be implemented within the next three to five years. 4ward Planning identified appropriate public and private sector actions necessary to address Long-Term Ready site factors, so as these sites may become Near-Term Ready opportunities. Findings and recommendations are presented in summary narrative and accompanied with supporting tables and maps.

Methodology: Potential Development/Redevelopment Parcels

Selected sites were further classified as either a “Near-Term Ready” site or “Long-Term Ready” site based on the following classifications:

Near-Term Ready Site (Typically, 0 to 3 Years)

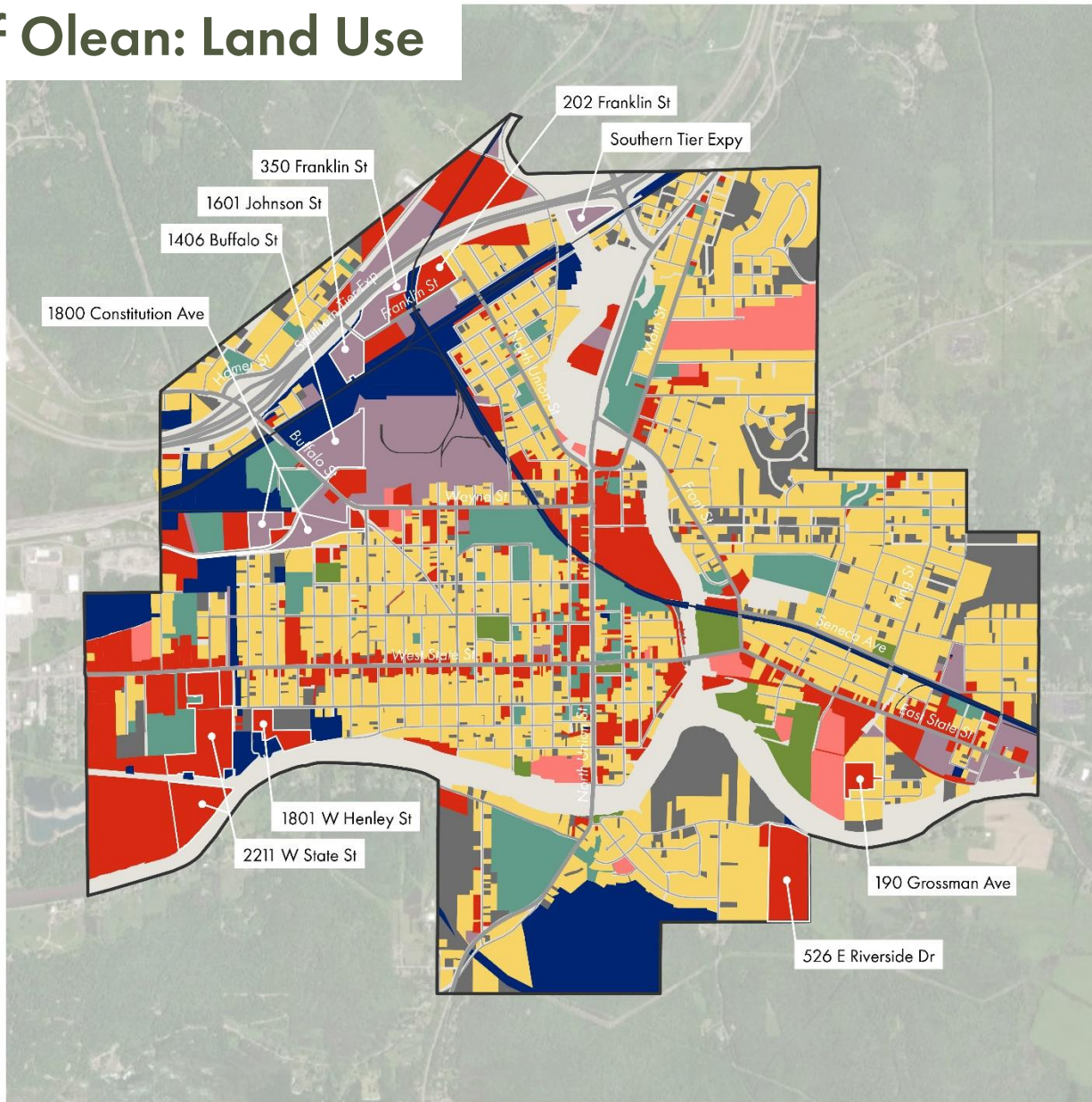
- Limited or no environmental contamination (clean site or sites with no action required)
- Sufficient infrastructure capacity (has public sewer and water service)
- Readily accessible via one or more modes of transportation (has direct road access)
- Preferred zoning is in place or can be legislated within a short timeframe (currently zoned for commercial or industrial or residential zoning allows for mixed-use)
- Requires little to no land assemblage and demolition (land assemblage includes no more than two landowners, parcel is greater than 5 acres, has low-ILV)

Long-Term Ready Site (Typically, 4 Years or longer)

- Brownfield site requiring extensive clean-up/mitigation (remaining sites)
- Infrastructure is inadequate or there is a lack of required infrastructure (site does not have readily accessible public water or sewer)
- Limited transportation accessibility (has road access within 500 feet)
- Significant land assemblage/demo required and/or diverse private ownership (land assemblage includes more than two landowners, parcel is greater than 5 acres, has low-ILV)

City of Olean

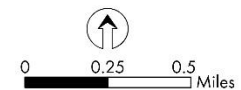
City of Olean: Land Use



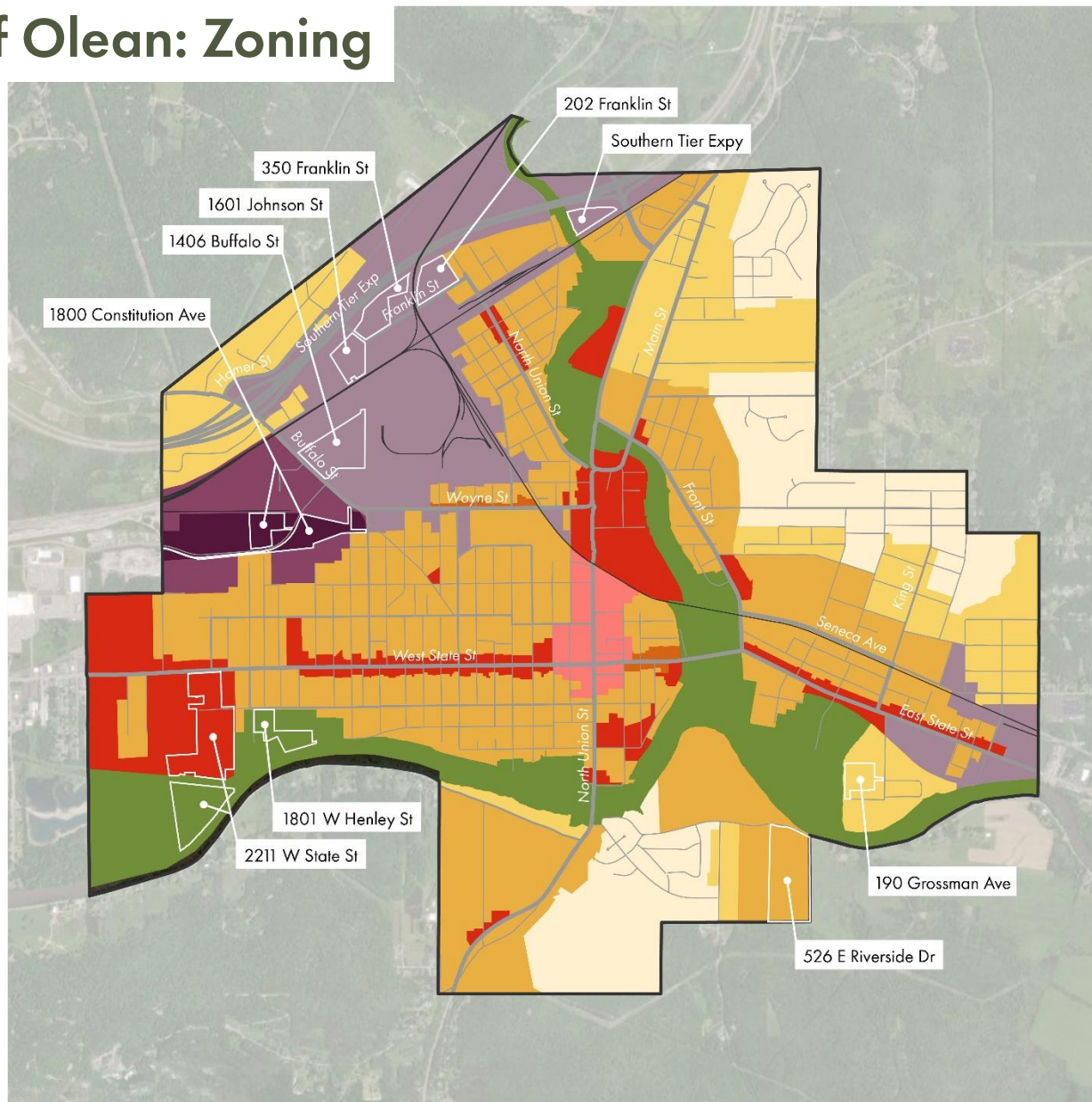
LAND USE City of Olean, NY

- City Boundary
- Road
- Railroad
- Wild, Forested, Conservation Lands & Public Parks
- Residential
- Commercial (Incl. Vacant)
- Recreation & Entertainment
- Community Services
- Public Services
- Industrial (Incl. Vacant)
- Other Vacant
- No Data

Data Sources
 Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS DOT (2013), Railroad New
 NYS GPO (2021), NYS Civil Boundaries



City of Olean: Zoning



ZONING City of Olean, NY

- City Boundary
- Road
- Railroad
- Waterfront Conservation (WC)
- Residential - 1 (R-1)
- Residential - 2 (R-2)
- Residential - 3 (R-3)
- Residential Transition (RT)
- City Center Commercial (CC)
- General Commercial (GC)
- Industrial (I)
- General Industrial - 2 (I-2)
- General Industrial - 3 (I-3)

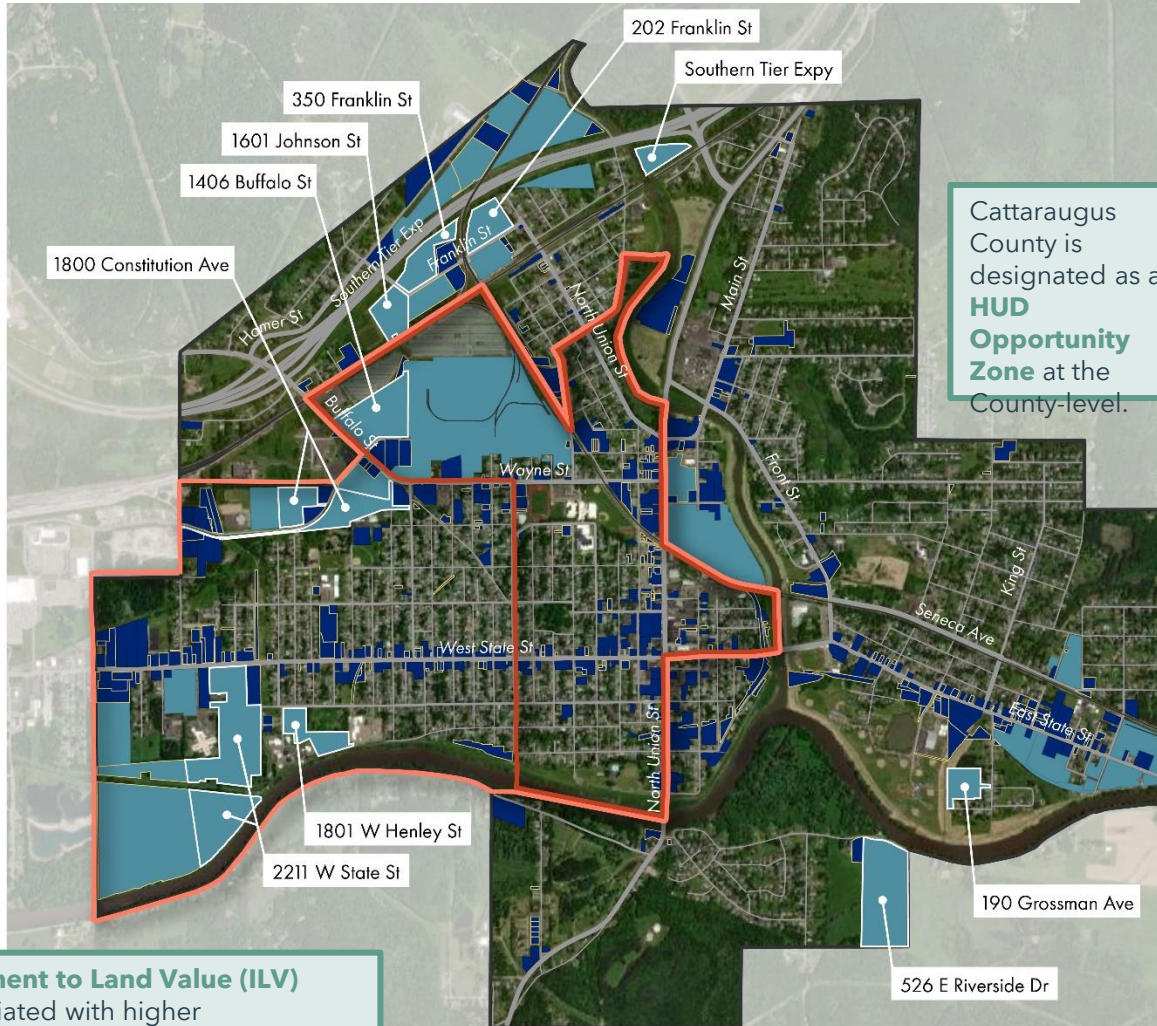
Note: This is not an official zoning map. It was developed for planning purposes.

Data Sources

Cattaraugus County (2021),
Cattaraugus Countywide
NYS DOT (2020), NYS Roadway Inventory
System
NYS DOT (2013), Railroad New
NYS GPO (2021), NYS Civil Boundaries



City of Olean: Redevelopment Opportunities



REDEVELOPMENT OPPORTUNITIES

City of Olean, NY

- City Boundary
- Road
- Railroad
- Financial Incentives**
- SBA HubZone
- NMTC & HUD Opportunity Zone
- Commercial/Industrial Properties**
- Low ILV
- >5 Acres
- <5 Acres

Data Sources
 Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries
 US Census Bureau (2020), il_2020_36_tract

A low **Investment to Land Value (ILV) Ratio** is associated with higher development potential. In the City of Olean, this includes commercial properties with an ILV of <1 and industrial properties with an ILV of 0.



City of Olean: Contamination



LAND & WATER CONTAMINATION

City of Olean, NY

- City Boundary
- Road
- Railroad
- Water Feature
- Remediation Sites**
- Registry Site, Public Threat (02)
- Non-Registry Site, Active Remediation (A)
- Registry Site, Completed (04)
- Non-Registry Site, Completed (C)
- Waterbody Inventory**
- No Known Impact
- Needs Verification
- Threatened
- Unassessed

Data Sources
 NYS DEC (2021), Remediation Site Boundaries
 NYS DEC (2020), Waterbody Inventory and Priority Waterbodies List
 NYS DOT (2020), NYS Roadway Inventory System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries
 NYS OCS (2008), Area Hydrography & Linear Hydrography



City of Olean: Readiness



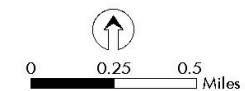
(RE)DEVELOPMENT READINESS

City of Olean, NY

- City Boundary
- Road
- Railroad
- Near-Term Ready Site
- Long-Term Ready Site

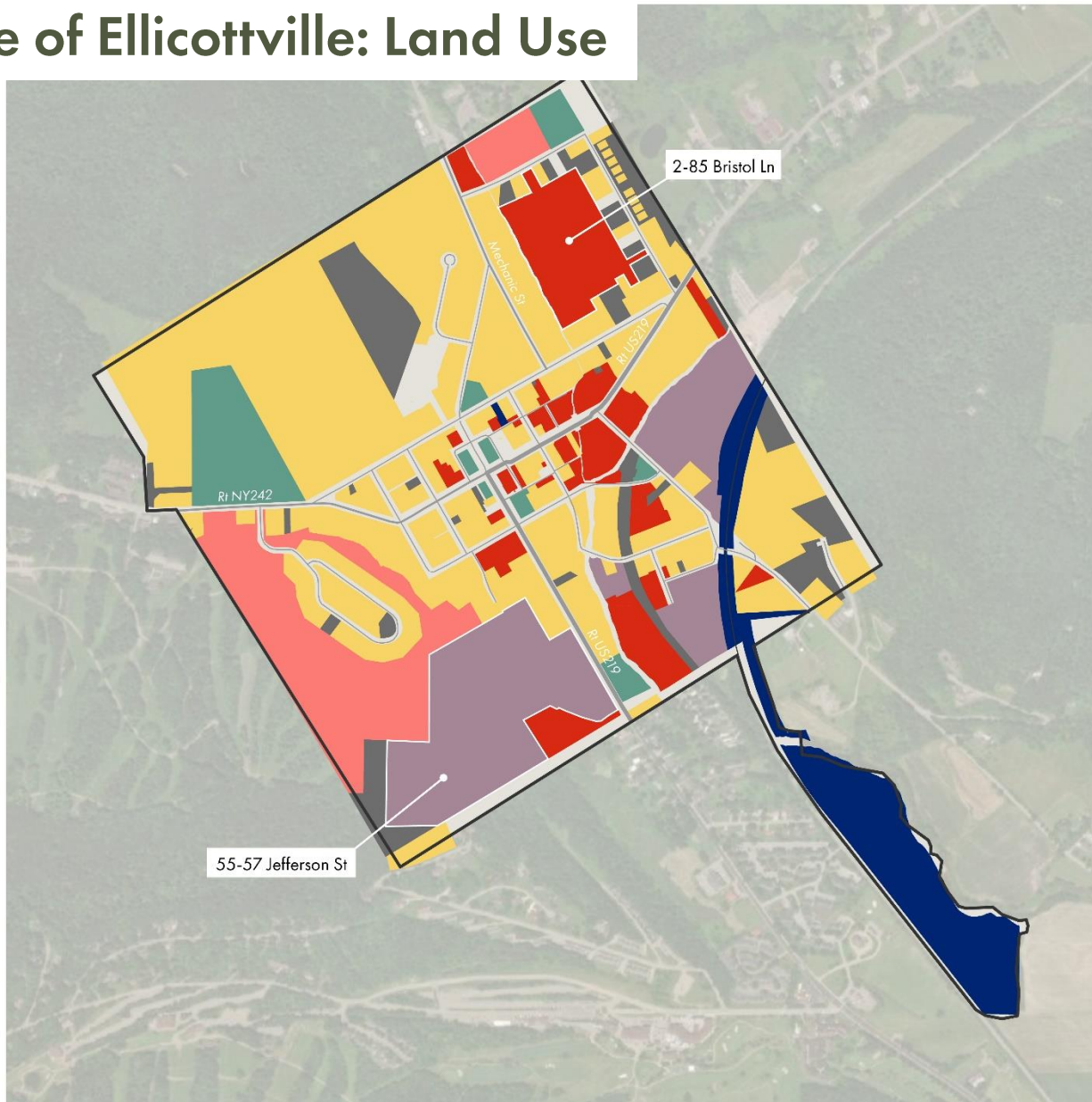
Data Sources

Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries



Village of Ellicottville

Village of Ellicottville: Land Use



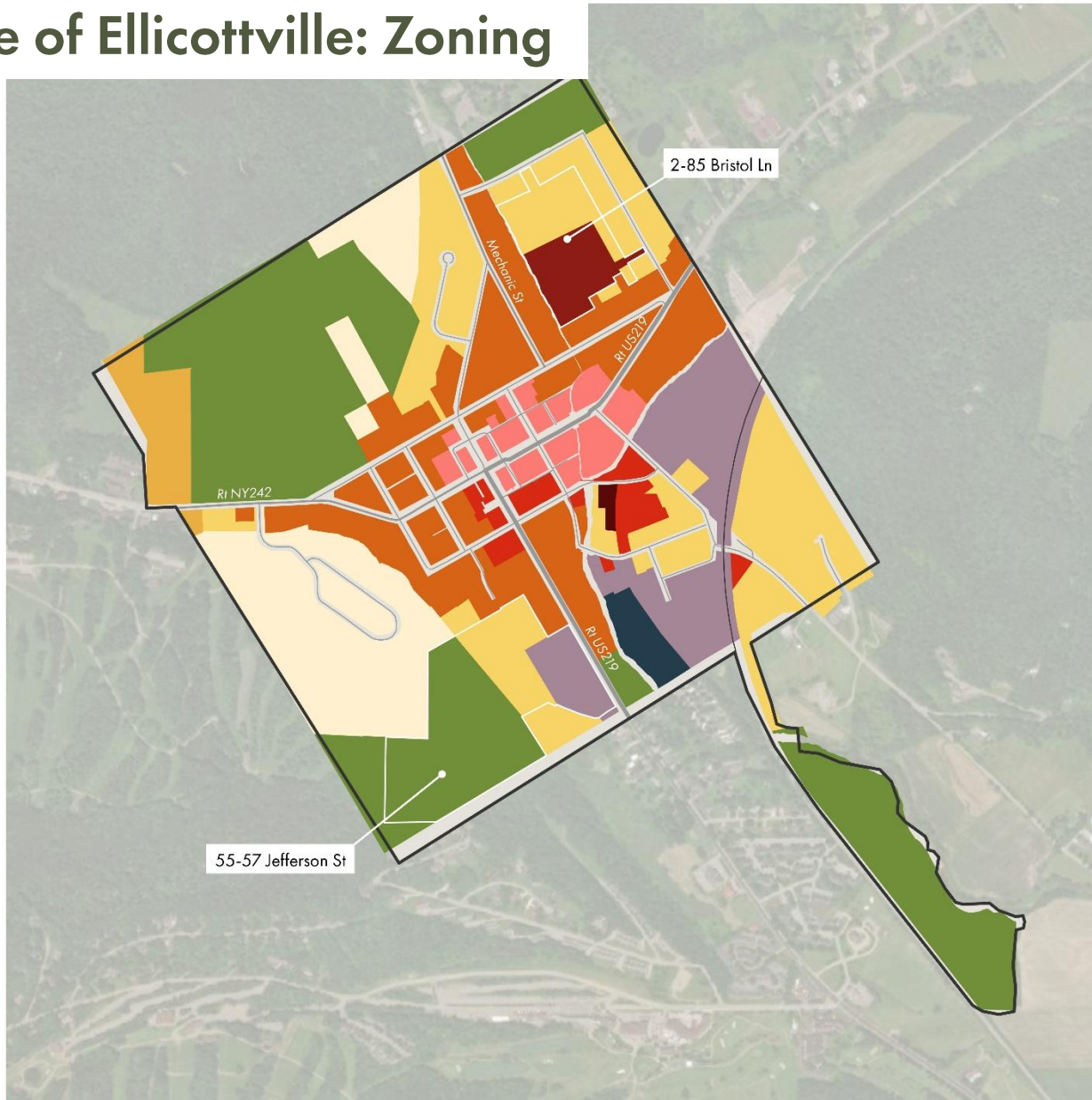
LAND USE Village of Ellicottville, NY

- City Boundary
- Road
- Railroad
- Residential
- Commercial (Incl. Vacant)
- Recreation & Entertainment
- Community Services
- Public Services
- Industrial (None Vacant)
- Other Vacant
- No Data

Data Sources
 Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries



Village of Ellicottville: Zoning



ZONING

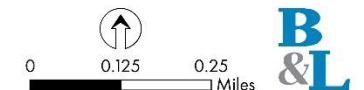
Village of Ellicottville, NY

- City Boundary
- Road
- Railroad
- Conservation (C)
- Low Density Residential (LD)
- Medium Density Residential (MD)
- High Density Residential (HD)
- Village Residential (VR)
- Residential Mobile Home District (RMHD)
- Village Commercial 1 (VC1)
- Village Commercial 2 (VC2)
- Village Commercial 3 (VC3)
- Village Commercial 3A (VC3A)
- Industrial (I)

Note: This is not an official zoning map. It was developed for planning purposes.

Data Sources

Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries



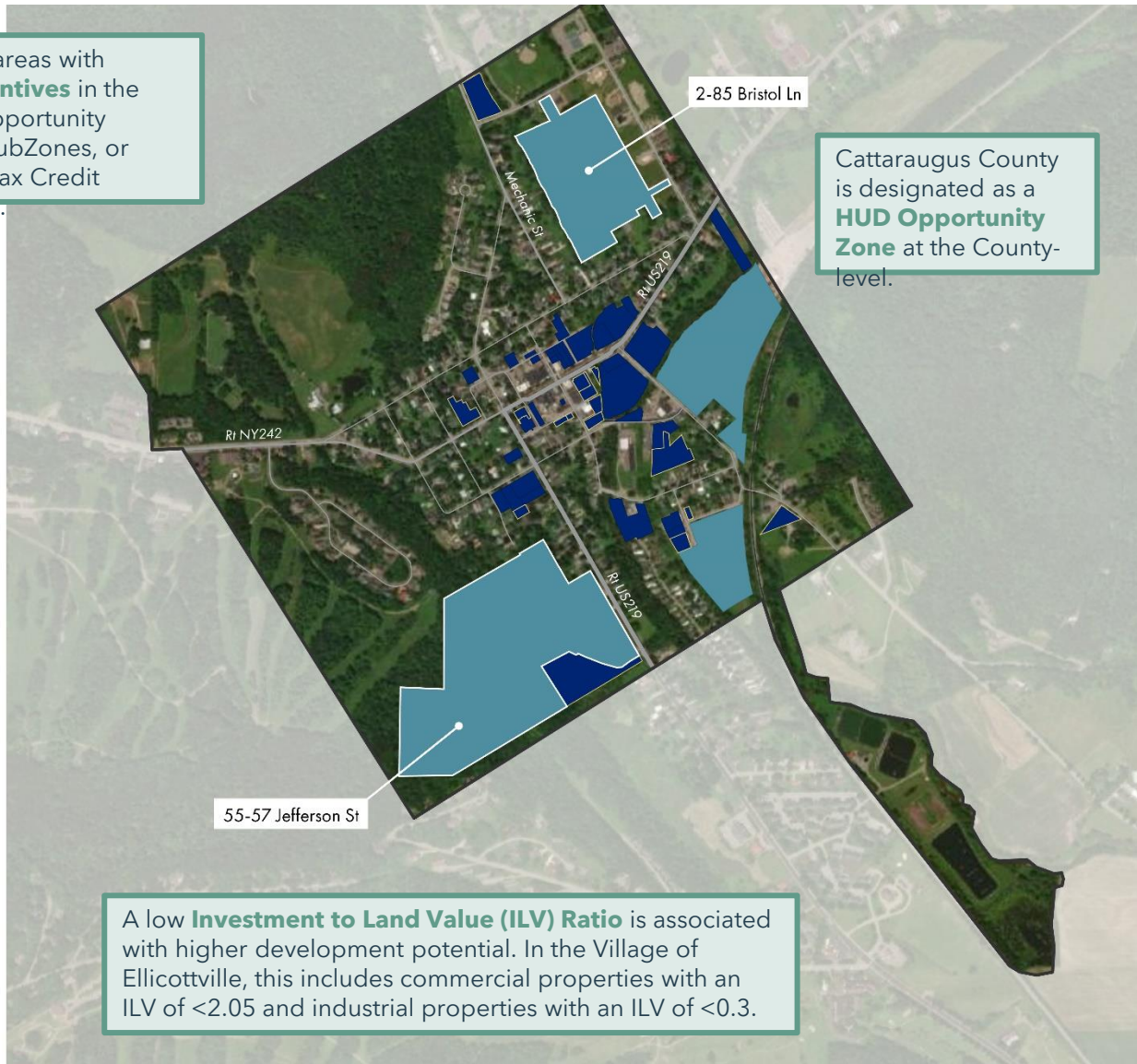
Village of Ellicottville: Redevelopment Opportunities

(RE)DEVELOPMENT OPPORTUNITIES

Village of Ellicottville, NY

There are no areas with **financial incentives** in the Village (no Opportunity Zones, SBA HubZones, or New Market Tax Credit eligible areas).

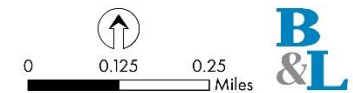
Cattaraugus County is designated as a **HUD Opportunity Zone** at the County-level.



- City Boundary
- Road
- Railroad
- Commercial/Industrial Properties**
- Low ILV
- >5 Acres
- <5 Acres

Data Sources
 Cattaraugus County (2021),
 Cattaraugus_Parcel Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS DOT (2013), Railroad New
 NYS GPO (2021), NYS Civil Boundaries

A low **Investment to Land Value (ILV) Ratio** is associated with higher development potential. In the Village of Ellicottville, this includes commercial properties with an ILV of <2.05 and industrial properties with an ILV of <0.3.



Village of Ellicottville: Contamination



LAND & WATER CONTAMINATION

Village of Ellicottville, NY

-  City Boundary
-  Road
-  Railroad
-  Water Feature

Remediation Sites

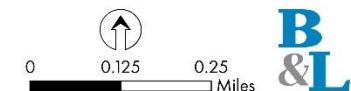
-  Registry Site, Completed (04)
-  Non-Registry Site, Completed (C)

Waterbody Inventory

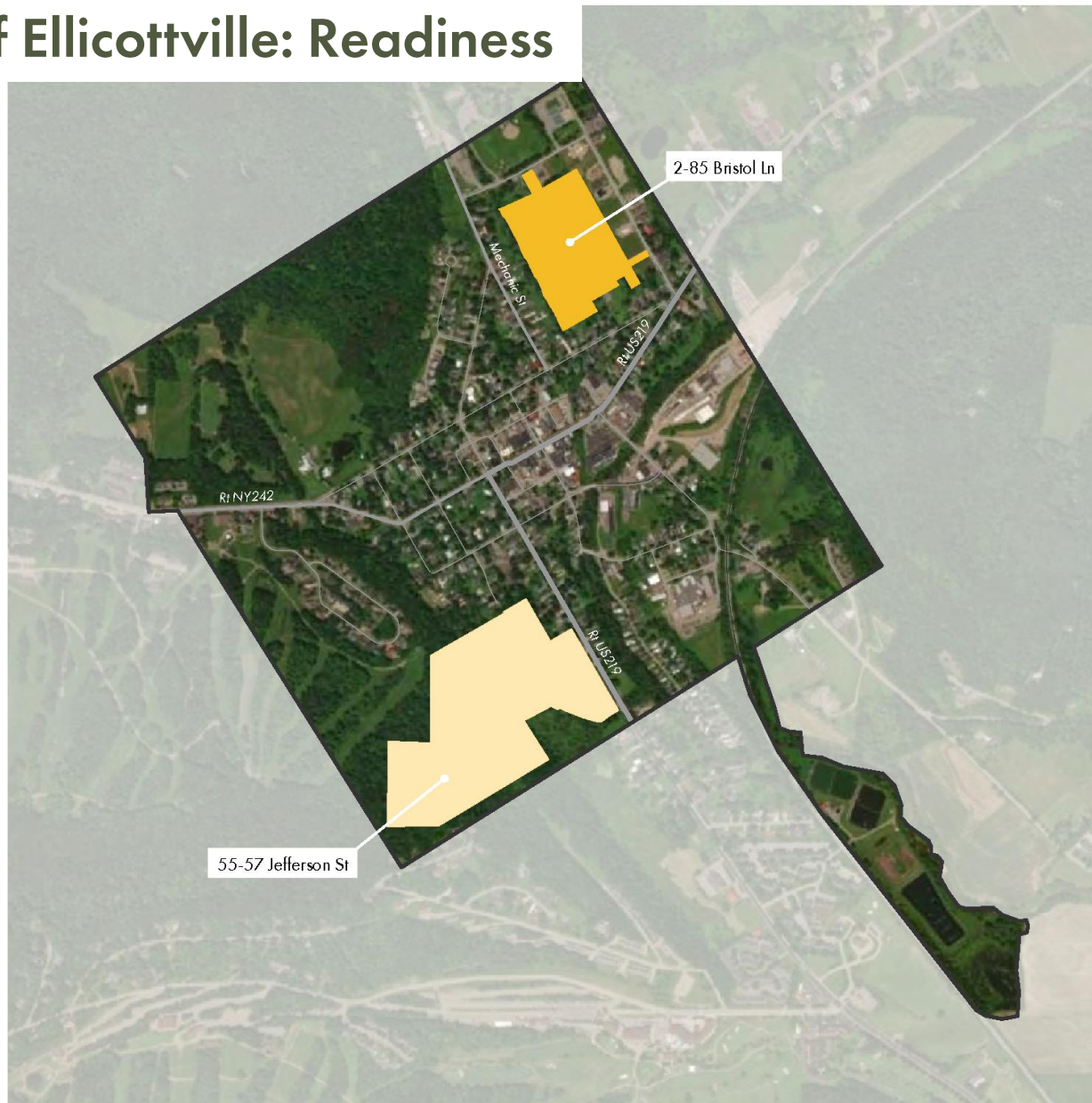
-  No Known Impact

Data Sources

NYS DEC (2021), Remediation Site Boundaries
 NYS DEC (2020), Waterbody Inventory and Priority Waterbodies List
 NYS DOT (2020), NYS Roadway Inventory System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries
 NYS OCS (2008), Linear Hydrography



City of Ellicottville: Readiness

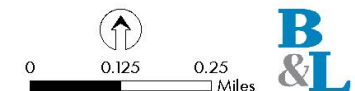


(RE)DEVELOPMENT READINESS

Village of Ellicottville, NY

- City Boundary
- Road
- Railroad
- Near-Term Ready Site
- Long-Term Ready Site

Data Sources
Cattaraugus County (2021),
Cattaraugus_Parcels_Current
NYS DOT (2020), NYS Roadway Inventory
System
NYS DOT (2013), RailroadNew
NYS GPO (2021), NYS Civil Boundaries



Near-Term Ready Sites

202 Franklin St.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 202 Franklin Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 5.0 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0.28 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Silence Dogood, LLC
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Industrial
	Environmental Constraints	<ul style="list-style-type: none"> • Completed non-registry site
	Infrastructure Capacity	<ul style="list-style-type: none"> • Has public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Hysol Park and adjacent surface parking
	Opportunities	<ul style="list-style-type: none"> • Light Industrial - Warehousing or manufacturing

1601 Johnson St.



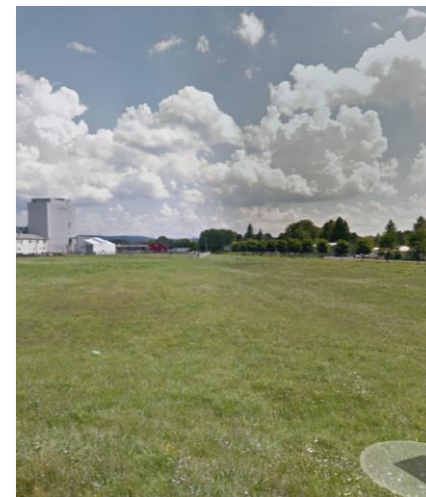
Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 1601 Johnson Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 8.2 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Nipperland Properties, LLC
	Land Assemblage	<ul style="list-style-type: none"> • Two buildings totaling approx. 20,050 gross square feet
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Industrial
	Environmental Constraints	<ul style="list-style-type: none"> • Waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Has public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Part of the property is occupied by a manufacturing and processing facility
	Opportunities	<ul style="list-style-type: none"> • Light industrial (manufacturing, light assembly and warehousing)

1406 Buffalo St.



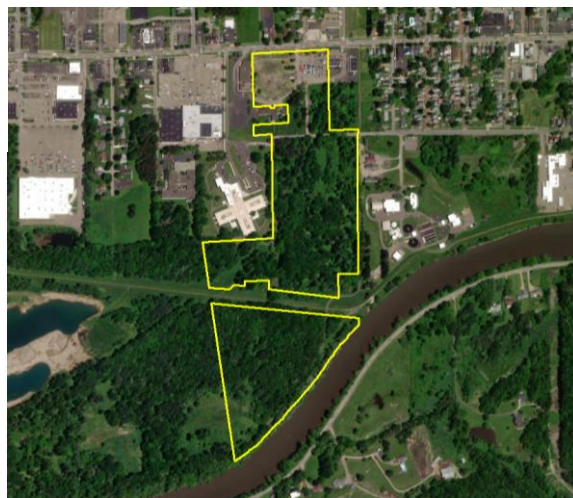
Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 1406 Buffalo Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 18.1 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • SBA HubZone, HUD Opportunity Zone, New Markets Tax Credit
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Olean Gateway, LLC
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Industrial
	Environmental Constraints	<ul style="list-style-type: none"> • Completed non-registry site
	Infrastructure Capacity	<ul style="list-style-type: none"> • Has public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Vacant
	Opportunities	<ul style="list-style-type: none"> • Light Industrial (manufacturing, light assembly and warehousing)

1800 Constitution Ave



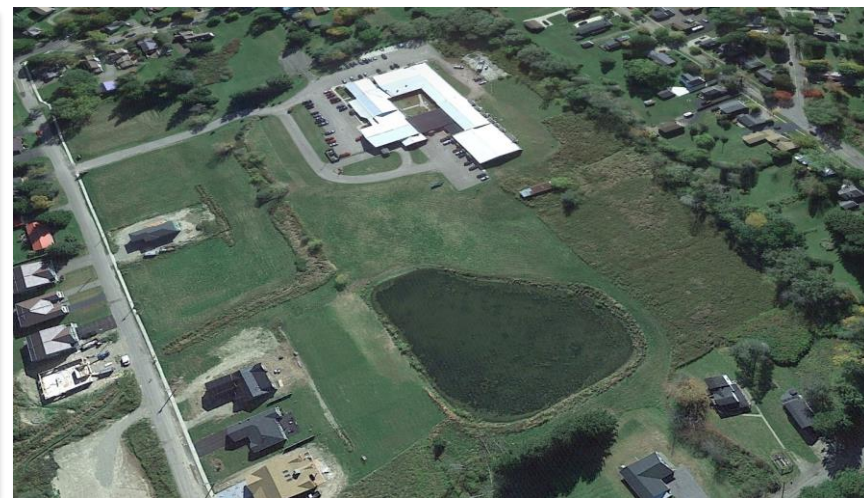
Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 1800 Constitution Ave, Olean
	Parcel Size	<ul style="list-style-type: none"> • 19.1 acres
	Financial Incentives	<ul style="list-style-type: none"> • ILV of 0 • HUD Opportunity Zone and New Markets Tax Credit
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Olean Urban Renewal Agency
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned General Industrial - 3
	Environmental Constraints	<ul style="list-style-type: none"> • Waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Vacant
	Opportunities	<ul style="list-style-type: none"> • Light Industrial (manufacturing, light assembly and warehousing)

2211 West State Street



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 2211 West State Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 47.8 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • HUD Opportunity Zone and New Markets Tax Credit
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Buffalo Main Street LLC
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Waterfront Conservation and General Commercial
	Environmental Constraints	<ul style="list-style-type: none"> • Southeastern boundary is a federal wetland, waterway of “needs verification” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Has public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Vacant with surface parking lot
	Opportunities	<ul style="list-style-type: none"> • Restaurant/Brew Pub with outdoor dining and event space

2-85 Bristol Ln.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 2-85 Bristol Lane, Ellicottville
	Parcel Size	<ul style="list-style-type: none"> • 18.1 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0.74 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • LLC Spragues Cattaraugus Square
	Land Assemblage	<ul style="list-style-type: none"> • Two buildings totaling 48,431 gross square feet
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Village Commercial 3 and Medium Density Residential
	Environmental Constraints	<ul style="list-style-type: none"> • Includes a small federal wetland in the center of the parcel, waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Part of the property is occupied by a multiple use/multi-purpose building
	Opportunities	<ul style="list-style-type: none"> • Mixed use and workforce housing

190 Grossman Ave.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 190 Grossman Avenue, Olean
	Parcel Size	<ul style="list-style-type: none"> • 6.4 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Olean Revival Center
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Current Zoning	<ul style="list-style-type: none"> • Currently zoned Residential – 2
	Environmental Constraints	<ul style="list-style-type: none"> • Waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
Land Use Suitability	Transportation Access	<ul style="list-style-type: none"> • Direct road access via Grossman Avenue and Osgood Avenue
	Current Use	<ul style="list-style-type: none"> • Vacant
	Opportunities	<ul style="list-style-type: none"> • Creation of small single-family housing units (workforce housing)

Long-Term Ready Sites

350 Franklin St.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 350 Franklin Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 9.0 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • MJ Painting Contractor Corp.
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Industrial
	Environmental Constraints	<ul style="list-style-type: none"> • Active non-registry site, waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
Land Use Suitability	Transportation Access	<ul style="list-style-type: none"> • Direct road access via Johnson Street and Franklin Street, direct rail access
	Current Use	<ul style="list-style-type: none"> • Vacant
	Opportunities	<ul style="list-style-type: none"> • Light Industrial (manufacturing, light assembly and warehousing)

Site Challenge

350 Franklin Street is currently under investigation through the Brownfield Cleanup Program. While a Work Plan has been approved, the site has yet to be remediated to an acceptable level. In order to be deemed ready for occupancy and reuse, the site must be issued a Certificate of Completion – until then, the types of allowable future uses are undecided.

Recommended Mitigating Actions

- Continue supporting the remediation efforts on site.
- Upon receipt of a Certificate of Completion, evaluate permissible land uses to identify potential redevelopment opportunities.

Available Technical and/or Financial Resources

- Connect investors with the City of Olean's Brownfield Opportunity Area program for available tax incentives.
- Encourage the property owner to weigh the benefits of the Brownfield Cleanup Program tax incentives against the costs of remediation and monitoring requirements.

1801 West Henley St.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 1801 West Henley Street, Olean
	Parcel Size	<ul style="list-style-type: none"> • 8.4 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • HUD Opportunity Zone and New Markets Tax Credit
Site Readiness	Property Owner	<ul style="list-style-type: none"> • City of Olean
	Land Assemblage	<ul style="list-style-type: none"> • No existing buildings
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Waterfront Conservation • Preferred commercial or industrial zoning
	Environmental Constraints	<ul style="list-style-type: none"> • Waterway of “needs verification” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
	Transportation Access	<ul style="list-style-type: none"> • Direct road access via West Henley Street and South 19th Street
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Vacant with surface parking lot
	Opportunities	<ul style="list-style-type: none"> • Light Industrial (indoor farming)

Site Challenge

1801 West Henley Street is currently zoned for Waterfront Conservation (WC), which permits a variety of residential, light commercial, and public uses. Light industrial uses – such as indoor farming – are prohibited within the Waterfront Conservation zoning district. In order to proceed with this type of development, the property owner must seek approval from the City and ensure adherence to the Zoning Code.

Recommended Mitigating Actions

- Apply for a use variance through the City of Olean Zoning Board of Appeals.

Available Technical and/or Financial Resources

- Connect the property owner with the City of Olean Department of Fire, Buildings, and Emergency Services for application assistance.
- Connect investors with the HUD Opportunity Zone and New Markets Tax Credit programs for available tax incentives.
- Connect investors with the USDA Farm Service Agency for potential loan resources.

526 East Riverside Dr.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 526 East Riverside Drive, Olean
	Parcel Size	<ul style="list-style-type: none"> • 27.5 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0.20 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • David A. Karnery
	Land Assemblage	<ul style="list-style-type: none"> • Three buildings totaling 12,425 gross square feet
	Preferred Zoning	<ul style="list-style-type: none"> • Currently zoned Residential – 3 • Preferred commercial or industrial zoning
	Environmental Constraints	<ul style="list-style-type: none"> • State wetland in northern portion of parcel, waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Public sewer and water service, served by gas and electric
	Transportation Access	<ul style="list-style-type: none"> • Direct road access via East Riverside Drive
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Storage
	Opportunities	<ul style="list-style-type: none"> • Outdoor Recreational (“glamping” campgrounds); Light industrial (indoor ag)

Site Challenge

526 East Riverside Drive is currently zoned for General Residential Use (R3), which permits a variety of agricultural, residential, and public uses. Private recreational uses – such as “glamping” establishments – and light industrial uses are prohibited. In order to proceed with either of these types of development, the property owner must seek approval from the City and ensure adherence to the Zoning Code.

Recommended Mitigating Actions

- Apply for a use variance through the City of Olean Zoning Board of Appeals.

Available Technical and/or Financial Resources

- Connect the property owner with City of Olean Department of Fire, Buildings, and Emergency Services for application assistance.
- Connect investors with the USDA Farm Service Agency for potential loan resources.

55-57 Jefferson St.



Selection Criteria		
Redevelopment Potential	Site Location	<ul style="list-style-type: none"> • 55-57 Jefferson Street (US 219), Ellicottville
	Parcel Size	<ul style="list-style-type: none"> • 41.7 acres
	Financial Incentives	<ul style="list-style-type: none"> • Has an ILV of 0 • Has no incentives
Site Readiness	Property Owner	<ul style="list-style-type: none"> • Iskalo Ellicottville Holdings
	Land Assemblage	<ul style="list-style-type: none"> • One building of 2,040 gross square feet
	Preferred Zoning	<ul style="list-style-type: none"> • Residential (current includes Industrial, Medium Density Residential, and Conservation)
	Environmental Constraints	<ul style="list-style-type: none"> • Registry site of ongoing management, non-registry completed site, federal wetland along Plum Creek, waterway of “no known impact” status
	Infrastructure Capacity	<ul style="list-style-type: none"> • Has public sewer and water service, served by gas and electric
	Transportation Access	<ul style="list-style-type: none"> • Direct road access via Jefferson Street (US 219)
Land Use Suitability	Current Use	<ul style="list-style-type: none"> • Manufacturing and processing
	Opportunities	<ul style="list-style-type: none"> • Residential (single-family attached and detached development)

Site Challenge

A portion of 55-57 Jefferson Street is zoned for Medium Density Residential - which permits single-family dwellings and specially permits two-family dwellings - while the rest is zoned for Industrial and Conservation. Should those areas which are zoned for Industrial and Conservation be desired for residential uses, the property owner must seek approval from the Village and ensure adherence to the Zoning Code.

Recommended Mitigating Actions

- Apply for a change in use through the joint Town and Village of Ellicottville Building & Code Enforcement Division (if proposed action takes place within the Industrial and/or Conservation zoning districts).
- Apply for a special use permit through the joint Town and Village of Ellicottville Building & Code Enforcement Division (if proposed action includes two-family dwellings).

Available Technical and/or Financial Resources

- Connect the property owner with the joint Town and Village of Ellicottville Building & Code Enforcement Division for application assistance.
- Connect investors with the NYS HOME program for potential grant funding.

Additional Considerations

55-57 Jefferson Street is both a completed Brownfield Cleanup Program site and a completed Registry Site through the State Superfund Program. According to the site's Certificate of Completion, allowable uses on the property include restricted-residential, commercial, and industrial. The property owner, Iskalo Ellicottville Holdings, plans to redevelop the property into a mixed-use lifestyle center.¹

Recommended Mitigating Actions

- N/A - Remediation requirements have been completed (monitoring efforts must be continued).

Available Technical and/or Financial Resources

- Encourage the property owner to weigh the benefits of the Brownfield Cleanup Program tax incentives against the cost of monitoring requirements.

¹ Town and Village of Ellicottville DRI, 2021

Town of Randolph

As part of an ongoing effort, the Town of Randolph, with B&L's assistance, is developing a Future Land Use Strategy. The draft document, which is near completion, identifies a number of action items that the Town could undertake to stimulate the local economy and increase the Town's tax base. These opportunities are largely focused on revitalizing the Town's traditional downtown in support of local business growth, and encouraging residential rehabilitation and new construction. The recommendations for residential investment are driven by the juxtaposition between local housing demand (largely as a result of the Town's quality school district) and insufficient quality and availability within the existing housing stock. Due to Randolph's intent to solicit future investment and funding, the Town's efforts should be considered by the County as it pursues economic development initiatives.

Key relevant recommendations from Randolph's draft Future Land Use (FLU) Strategy include:

1. Connect homeowners and renters to home repair funds (e.g. USDA, NYSERDA).
2. Apply for NYS CDBG Housing Rehabilitation funds to support homeowners and renters with home repairs.
3. Collaborate with developers to pursue new residential subdivisions.
4. Apply for the County's Revitalization Fund and NYS HCR's NY Main Streets program to plan and implement enhancements to the downtown streetscape and support local businesses that elect to participate by developing concept plans and cost estimates for mixed-use commercial/residential uses.



Photo: Jamestown St in Randolph's downtown

CHALLENGES & RECOMMENDATIONS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

Challenge: Supporting Skilled Trades

The skilled trades and manufacturing companies around the country are finding it increasingly difficult to attract young people into their industries. This is compounded by the fact that in states such as New York, more than half of skilled workers in these industries are anticipated to retire over the next five to 10 years.

There are a myriad of reasons for the challenges of recruiting young people to these industries, not least of which is the expectation of attending college and the stigma of working with one's hands. Often it is the parents of high school students exerting significant influence over their children's career choices and may not be well informed about career path opportunities in the trades and manufacturing industries.

Recommended Supportive Actions

- In collaboration with the well-established and successful *Dream It Do It* program in Cattaraugus County (currently known as *Dream It Do It 2.0*), local building trades organizations, and area high schools, the County should develop an ambassadors program, whereby local young people trained and employed in the building trades or manufacturing sector visit high schools on career days and share their experiences and answer questions about working in the trades or manufacturing. The purpose is to have someone (preferably a person younger than 25) relatable to high school students convey insights on well-paying careers as alternatives to attending college.
- The County should enlist the services of an ad firm to develop collateral and video materials showing young people working in the skilled trades and manufacturing jobs. The materials will also emphasize earnings potential and draw comparisons to occupations requiring college degrees and associated costs.

Challenge: Business Succession Evaluation

A large share of businesses within Cattaraugus County are family-owned and operated, including a number of manufacturing and trades businesses. It is unclear as to how many of these businesses have succession plans in place - a defined process of transferring ownership and management from the current owner to a new owner (often with small businesses, this will be a close family member or senior-level employee). However, it is not uncommon for a small business owner to lack a succession plan and, upon retirement or the death of the owner, the business often simply shuts and eliminates employment opportunities. Assuming a number of businesses in Cattaraugus County are likely owned and operated by persons 40 and over, there is good reason to ensure that existing business owners plan for succession.

Recommended Supportive Actions

- Cattaraugus County should hold bi-annual webinars informing county businesses about business succession planning, inclusive of legal and tax implications. The County would collaborate with local tax accounting and business law professionals who would sponsor and conduct the webinar events. The County will need to partner with local municipalities, chambers of commerce, local banks, and accounting professionals to ensure appropriate outreach to area businesses.
- The County should schedule visits to locally owned businesses with 25 or more employees to discuss the importance of succession planning and find out what, if anything, the County can do to assist businesses in this endeavor.

ECONOMIC IMPACT ANALYSIS

ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™



DRAFT REPORT - NOT FOR PUBLIC CIRCULATION

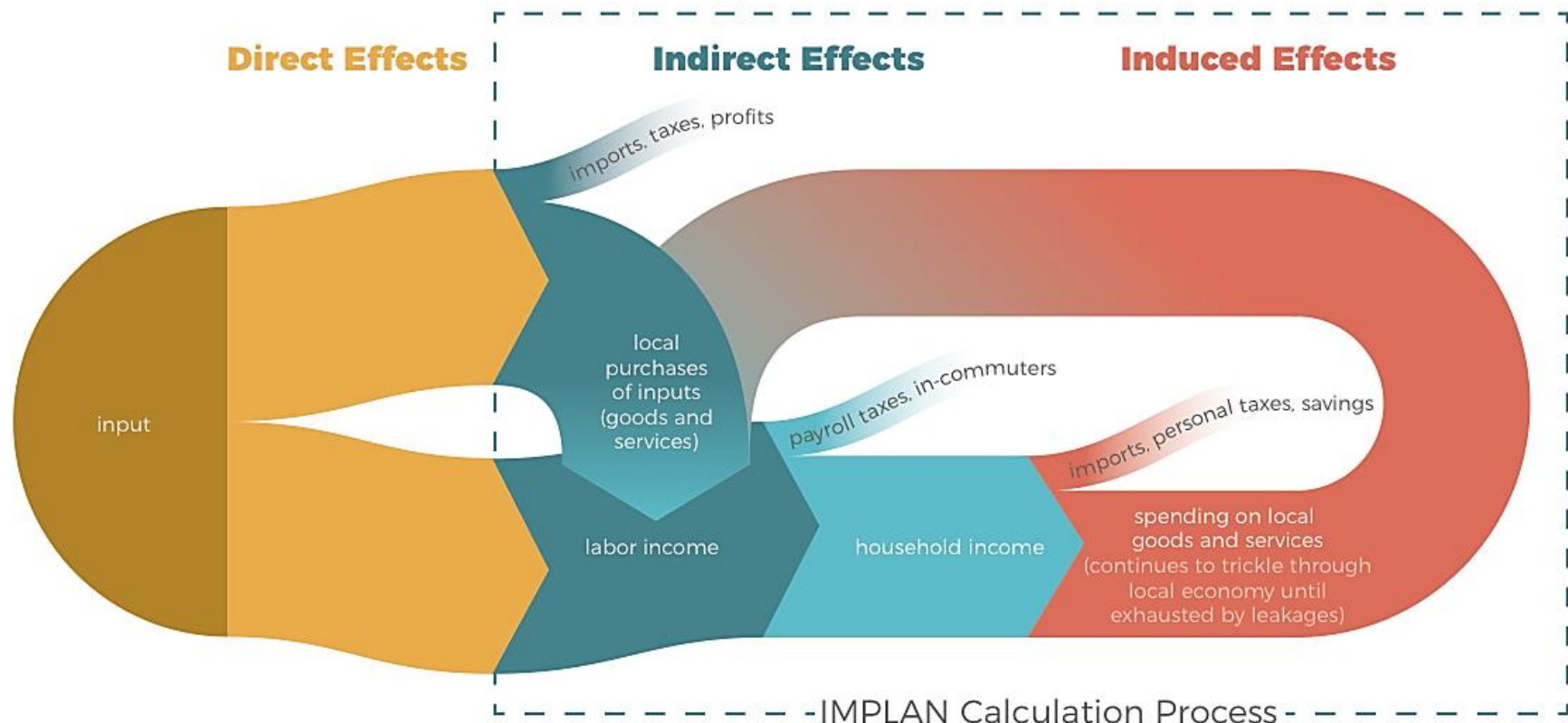
Input-Output Impact Modeling: Overview

IMPLAN is an input-output (I-O) software program designed to predict the ripple effect of an economic activity by using data about previous spending in a given regional economy (e.g., Cattaraugus County). The model uses annual, regional data to map these buy-sell relationships in a series of economic multipliers (e.g., employment, labor income, value added, and output) so users can predict how a specific economic event (e.g., investment in a new cheese plant) will impact a given regional economy. The foundational concept is that all industries, households, and government in the economy are connected through buy-sell relationships, therefore a given economic activity supports a ripple of additional economic activity throughout the economy. Based on IMPLAN’s multipliers, a user can estimate an event’s direct, indirect, and induced impacts. The direct effect is the initial change in final demand (e.g., construction spending or new non-local household income) in terms of industry output employment, and labor income dollars. Indirect effects are the business-to-business purchases in the supply chain taking place in the region that emerge from the initial industry input purchases. The induced effects stem from employees working in the direct and indirect industries spending their wages throughout the region of study. Once the IMPLAN model has been run for a given project, the user can identify industries by direct, indirect, induced, and total effects in terms of output, employment, labor income, or value added to identify top industries affected. An overview of IMPLAN model effects and multipliers are provided in the table below and the graphic on the following page.

Effects	Description
Direct	= Expenditures or Spending: Production change associated with a change in demand for the good itself.
Indirect	= Supply Chain Spending: The impact of local industries buying goods and services from other local industries (e.g. intermediate expenditures).
Induced	= Household Spending: Changes in household spending due to the additional employment generated by direct and indirect effects.

Input-Output Impact Modeling: Overview (continued)

Economic impact analysis involves applying a final demand change to a predictive economic input-output model, and then analyzing the resulting changes in the economy under study. More concisely, an impact analysis is an assessment of change in overall economic activity as a result of change in one or several specific economic activities. Economic effects, whether for employment or output, are typically referenced as **direct**, **indirect**, and **induced**.



Key Findings: Economic Impact Analysis

\$1.29 return for every dollar spent during construction

In 2022, construction of the cheese plant in Cattaraugus County could support approximately 4,660 total temporary full- and part-time construction related jobs (includes direct, indirect, and induced), and generate \$257.5 million in total labor income, \$310.3 million in total value added, and \$652.7 million in total output within the County. For every \$1.00 in construction investment (\$505 million), another \$1.29 is generated in output (\$652.7 million) within the county.

340 net new total permanent jobs by 2025

As summarized below, by 2025, during the first year of operation, the cheese plant is expected to support approximately 340 total permanent net new full- and part-time jobs (includes direct, indirect, and induced), and generate \$22.3 million in total labor income, \$33.0 million in total value added, and \$209.7 million in total output within the County.

Construction (2022)

	Employment	Labor Income	Value Added	Output
Direct	3,699	\$213,750,673	\$231,302,013	\$505,000,000
Indirect	328	\$17,487,225	\$29,346,793	\$59,641,608
Induced	633	\$26,292,889	\$49,613,261	\$88,026,944
Total	4,661	\$257,530,787	\$310,262,066	\$652,668,552
Return on Investment (ROI)				\$1.29

Operation (2025)

	Employment	Labor Income	Value Added	Output
Direct	200	\$14,694,446	\$21,273,194	\$185,649,015
Indirect	94	\$5,665,547	\$8,011,462	\$17,394,797
Induced	48	\$1,984,504	\$3,738,866	\$6,639,646
Total	341	\$22,344,497	\$33,023,522	\$209,683,458

Source: 4ward Planning Inc., IMPLAN, 2021

Methodology: Economic Impact Analysis

The Great Lakes Cheese Company is planning on constructing a new 500,000-square-foot cheese plant in the towns of Franklinville and Farmersville. Construction is anticipated to cost \$505 million and begin in the spring 2022 with the plant expected to be occupied by early 2025. The plant will continue to employ the 226 existing workers at the current Cuba site (located in neighboring Allegany County) as well as add 200 additional jobs (resulting in 200 net new jobs). 4ward Planning used IMPLAN, to conduct an economic impact analysis of the relocation and expansion of the cheese plant in Cattaraugus County, during both construction and operation. 4ward Planning utilized 2020 IMPLAN data for Cattaraugus County, New York (the latest year available), to generate a series of economic multipliers (e.g., employment, labor income, value added, and economic output) that measure the amount of total economic activity generated by a specific industry within the County. To identify the temporary economic impacts during project construction, the \$505 million in estimated development costs were modeled for 2022. To identify the permanent economic impacts during project operation, 4ward Planning modeled the 200 net new jobs created in the Cheese manufacturing sector. Since this sector did not already exist in Cattaraugus County, the sector was customized using per worker values for the nation as a proxy. Dollar values are presented in 2022 dollars. Model assumptions for construction and operation are provided below.

Stage	Impact Type	IMPLAN Sector	Value	Year Modeled
Plant Construction	Industry Output	51- Construction of new manufacturing structures	\$505,000,000	2022
Plant Operation	Industry Employment	82 - Cheese manufacturing	200	2025

Source: Olean Times Herald, Great Lakes Cheese: Franklinville is site of \$505 million plant; 4ward Planning Inc., IMPLAN, 2021.

APPENDIX

Focus Groups Attendees & Interviews Contacts

Agricultural Land-Use & Planning

- Megan Boberg, Agricultural Farmland Protection Bureau (AFPB), Soil & Water District
- Kathy Ellis, County Planning Board/Director of DPW
- Dan Martonis, Director of Real Property, AFPB
- Emily Miller, Farm Service Agency
- Marie Myers-Shearing, County Planner
- Al Ormond, County Planning Board
- Dick Rivers, Director of Cooperative Extension, AFPB
- David Zilker, AFPB

Economic Development

- Courtney Curatolo, Director, Small Business Development Center
- Keri Kerper, Community Development Office, City of Olean
- Keith Kranick, Director, Workforce Development, Jamestown Community College
- Jason Miller, Director, Workforce Investment Board
- Richard Zink, Director, Southern Tier West

Great Lakes Cheese

- Matt Wilkinson, Vice President, Technology & Business Development, Great Lakes Cheese

Higher Education

- Tom Buttafarro, Director of Government & Community Relations, St. Bonaventure University
- Daniel DeMarte, President, Jamestown Community College
- Holger Ekanger, VP of Workforce Readiness, Jamestown Community College
- Dr. David Hilmey, Acting Provost & VP for Academic Affairs, St. Bonaventure University

Focus Groups Attendees & Interviews Contacts (cont.)

Higher Education (continued)

- Keith Kranick, Director Workforce Readiness, Jamestown Community College
- Brett Marvin, Manager, Cattaraugus One-Stop Career Center
- Jason Miller, Executive Director, Chautauqua-Allegany Workforce Development Board
- Joseph Zimmer, Acting President, St. Bonaventure University

Manufacturers

- Tara DeLong, Manger, Office Operations, Napoleon Engineering
- Mary Gabalski, General Manager, Fenton Mobility
- Patrick Reagan, President, Metallic Ladder
- Jim Stitt Jr., CEO & President, Cutco

Municipal Leaders

- Bill Aiello, Mayor of Olean
- Don Benson, Legislator, Town of Allegany
- Mark Heberling, Farmersville Board
- Mike Higgins, Allegany Town Board
- Kathy Martin, Allegany Town Board
- Andrea Mellon, Town of Ashford Supervisor & NYSERDA
- Gary Palumbo, Town of Ellicottville Planner
- Annette Parker, Town of Olean Supervisor
- Deryle Pinney, Town of Allegany Clerk

Focus Groups Attendees & Interviews Contacts (cont.)

Tourism & Heritage

- Crystal Abers, Onoville Marina & Campground/Cattaraugus County Tourism Direct
- Jane Eshbaugh, Holiday Valley, Director of Marketing
- Bruce Fredrickson, Village of Franklinville Historian
- Maggie Fredrickson, Village of Franklinville Historian
- Samantha Hayes, Cattaraugus County Tourism
- Gerri Jimerson, GIS, Seneca Nation of Indians
- Jeremy Knab, Cattaraugus County, Web Technician
- Meme Krahe-Yanetsko, Olean Area Chamber of Commerce
- Nila Lampman, Griffis Sculpture Park, Executive Director
- Brian McFadden, Ellicottville Chamber of Commerce
- Deb Miller, Catt County Economic Development, Amish Trail
- Sharon Ray, Seneca Nation of Indians, Department of Transportation
- Kate O'Stricker, Trails Committee, Catt County Economic Development/Catt County Sr. Development Specialist
- Danna Scharf, Cattaraugus County Tourism
- Joe Stahlman, Seneca Iroquois National Museum, Director & THPO
- Steve Teachman, Olean Historical Society & Olean Pointe Museum
- Jessica Wallace, Ellicottville Chamber of Commerce

Real Estate Professionals

- Cathy Pritchard, Associate Broker, ERA
- Dave Zilker, Associate Broker, ERA

Glossary of Terms: Socio-Economic & Labor

Empty-Nester Household: A household in which one or more parents live after the children have left home, typically represented by ages 55 through 74.

Household Population: Household population, as compared to total population, excludes persons living in dormitories, penal facilities, hospitals, and other institutional settings.

Family: A family is a group of two or more people (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people are considered members of one family.

Non-Family Household: A non-family household consists of a householder living alone (a one-person household) or a householder sharing the home exclusively with people to whom he/she is not related.

Growth Rates: The chart below outlines how 4ward Planning defines growth rates. For example, flat growth reflects an annualized rate of change between -0.75 and 0.75 percent.

Primary Job: A primary job is the dominant job for an individual, defined as the job earning an individual the most money. The number of primary jobs should be equal to the number of workers in a given area.

Strong Positive Growth	Greater than	1.50%		annually
Modest Positive Growth	Between	1.50% and 0.75%		annually
Flat Growth	Between	0.75% and -0.75%		annually
Modest Negative Growth	Between	-0.75% and -1.50%		annually
Strong Negative Growth	Less than	-1.50%		annually

Household: A household consists of all the people who occupy a housing unit. A house, apartment, or other group of rooms or a single room, is regarded as a housing unit when occupied or intended for occupancy as a separate living quarter. The count of households excludes group quarters and institutions.

Source: US Census Bureau

Glossary of Terms: Industry Clusters

Establishment: According to NAICS, an establishment is generally a single physical location where business is conducted or where services or industrial operations are performed (for example, a factory, mill, store, hotel, movie theater, mine, farm, airline terminal, sales office, warehouse, or central administrative office).

NAICS (North American Industry Classification System): The standard used by federal statistical agencies in classifying business establishments according to type of economic activity and/or process of production

Output: Output represents the value of industry production. In IMPLAN, these are annual production estimates for the year of the data set and are in producer prices. For manufacturers, this would be sales plus/minus change in inventory. For service sectors, production = sales. For Retail and wholesale trade, output = gross margin and not gross sales.

Intermediate Imports: Purchases of non-durable goods and services that are used to produce other goods and services rather than for final consumption.

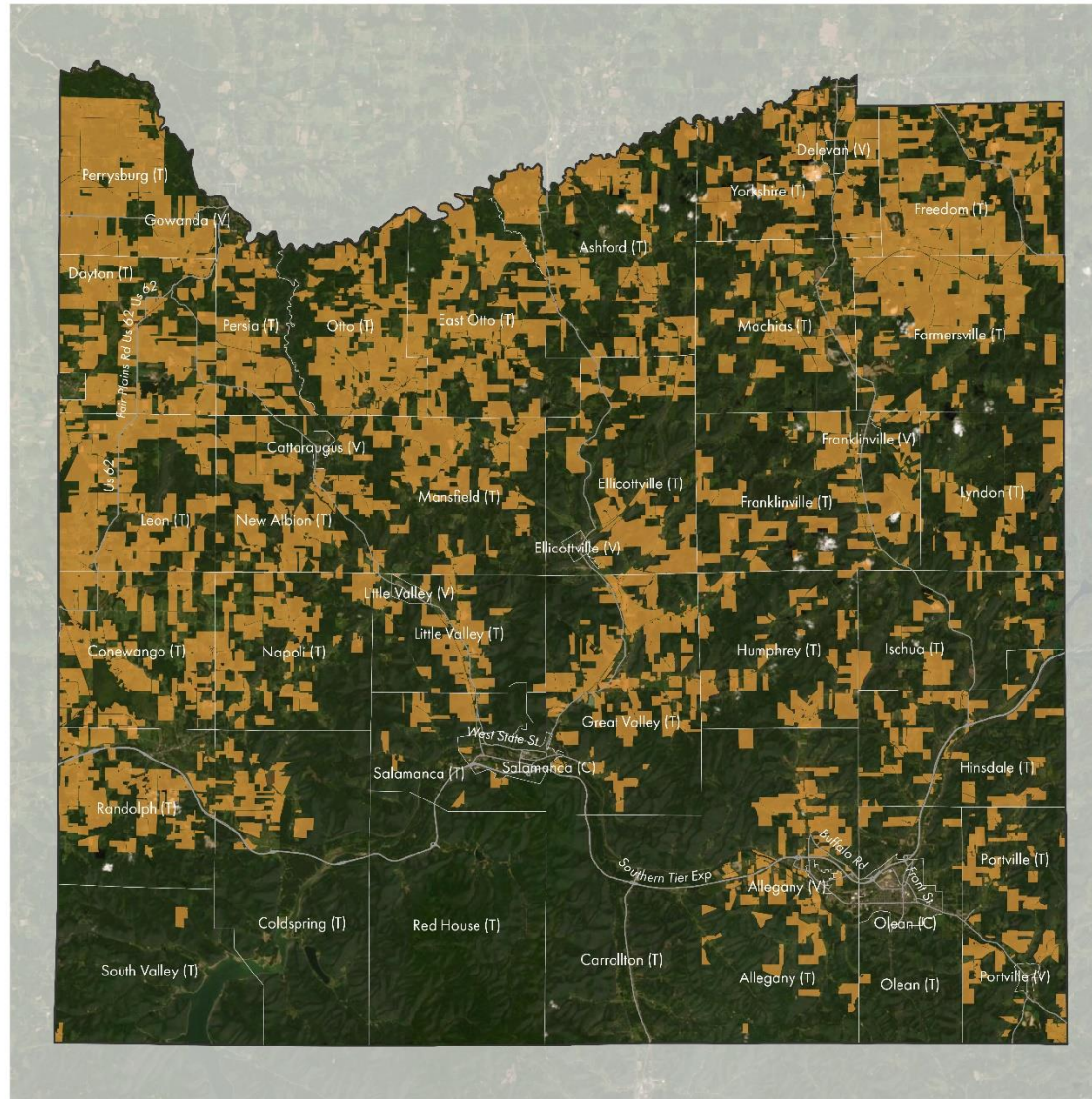
Industry: The industry is the type of activity that occurs at a person's place of work. Industries are classified through the NAICS.

Industry Clusters: Geographically concentrated groups of inter-connected companies and associated institutions in a particular field. Clusters arise because they increase the productivity with which companies can compete. Strong clusters drive regional economic performance, resulting in job growth; higher wages; higher patenting rates; and greater new business formation, growth, and survival. New Jersey's seven Industry Clusters, as identified by the New Jersey Department of Labor and Workforce Development, are presented on the following page.

Location Quotients: A location quotient compares an industry's local employment concentration to another base area (in this analysis, the nation). Location Quotient greater than 1.0 (or ~1.2) often indicate an industry is an export activity and is a link to the outside economy (brings outside \$ into the region)

Multipliers: A multiplier is a measure of the total number of jobs or output (direct, indirect, and induced) created by each additional job or investment in a given industry. The multipliers for a given region indicate the intra-regional "backward linkages" of each major NAICS category for every dollar spent, in terms of employment and output.

County-Wide Maps



AGRICULTURAL DISTRICTS Cattaraugus County

- County Boundary
- Municipal Boundary
- Arterial Road
- Agricultural District

Data Sources
 Cornell IRIS & NYS Dept. of Agriculture & Markets (2017), Agricultural Districts
 NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries



County-Wide Maps



TRUCK ROUTES Cattaraugus County

- County Boundary
- Municipal Boundary
- Traffic Occupied by Trucks**
- 0-5%
- 5-10%
- 10-15%
- 15-20%
- 20-25%
- 30-35%

Data Sources
 NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries



County-Wide Maps



TRANSPORTATION Cattaraugus County

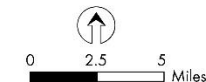
- County Boundary
- Municipal Boundary
- Railroad

Average Annual Daily Traffic

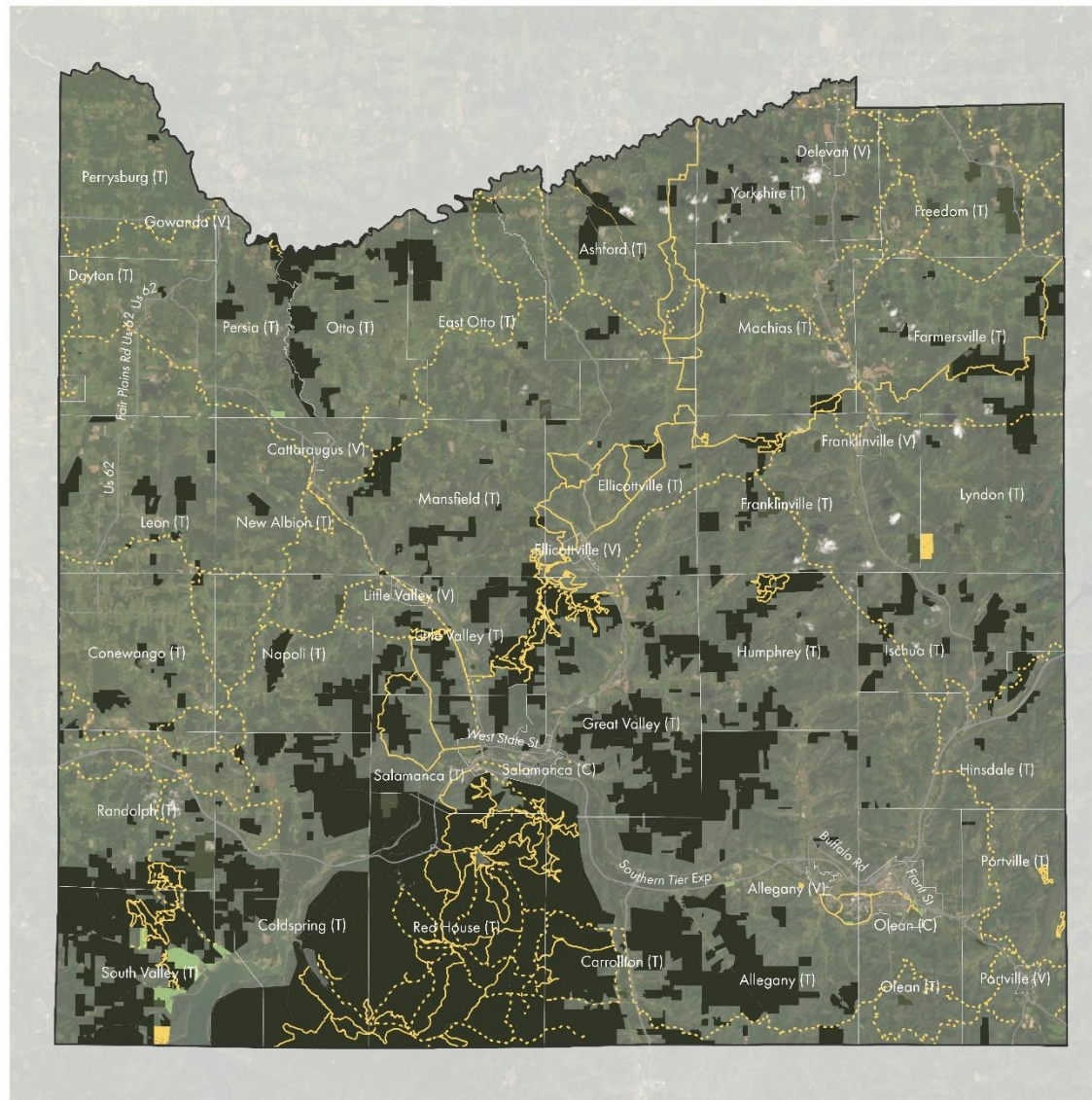
- 625 or Less
- 626-1,250
- 1,251-2,500
- 2,501-5,000
- 5,001-10,000
- 10,001 or More

Data Sources

NYS DOT (2020), NYS Roadway Inventory System
 NYS DOT (2013), RailroadNew
 NYS GPO (2021), NYS Civil Boundaries



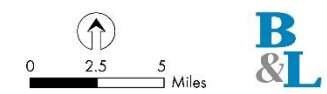
County-Wide Maps



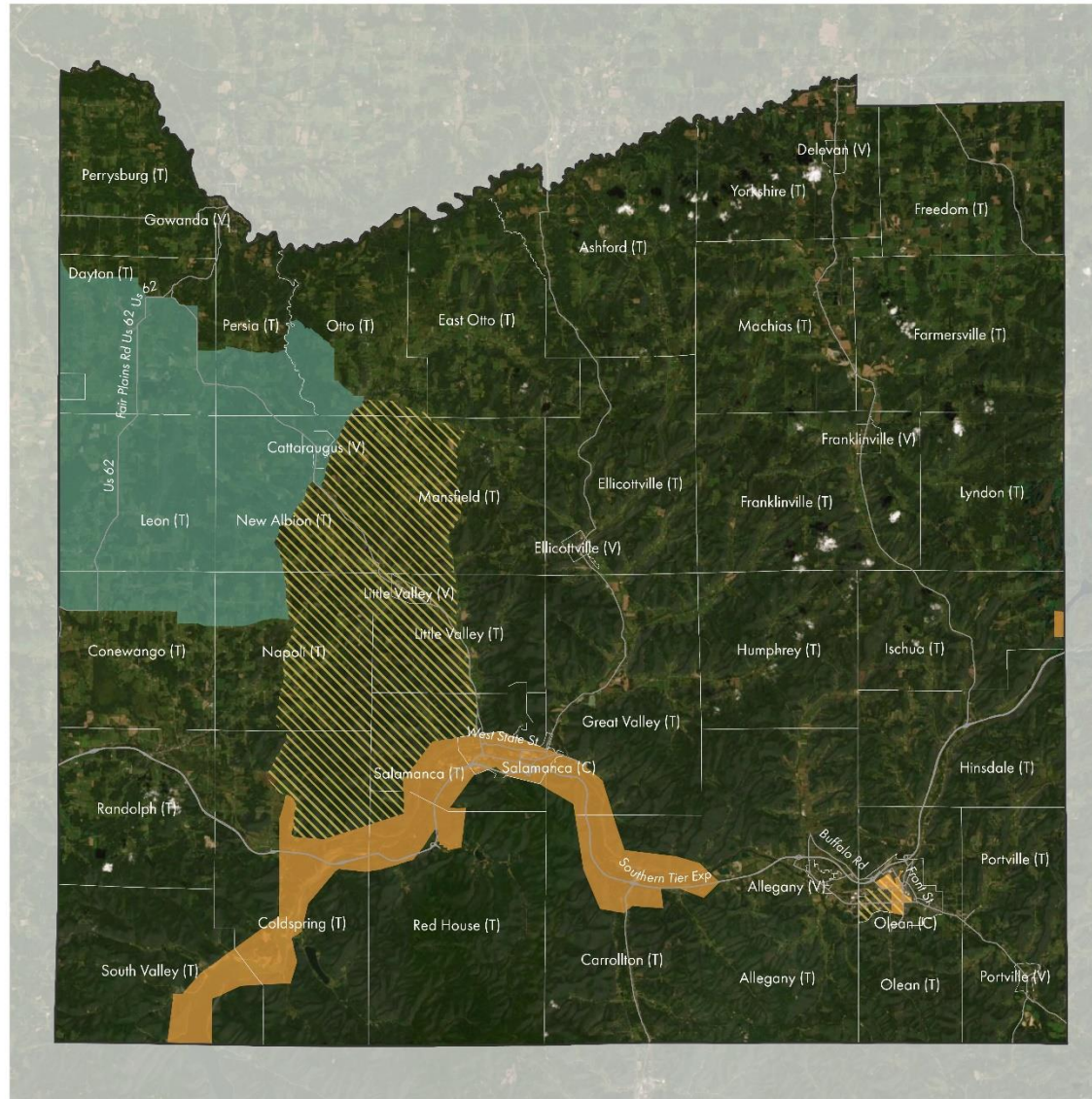
OUTDOOR RECREATION & ENTERTAINMENT Cattaraugus County

- County Boundary
- Municipal Boundary
- Arterial Road
- Hiking or Multi-Use Trail
- Trail with Snowmobile Use
- Park, Playground, or Picnic Area
- Camping Area
- Forested/Conservation Land

Data Sources
 Cattaraugus County (2021),
 Cattaraugus_Parcels_Current
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS GPO (2021), NYS Civil Boundaries



County-Wide Maps



FINANCIAL INCENTIVES

Cattaraugus County

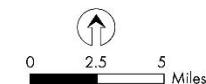


- County Boundary
- Municipal Boundary
- Arterial Road
- HUD Opportunity Zone
- SBA HUBZone, Qualified
- SBA HUBZone, Expiring

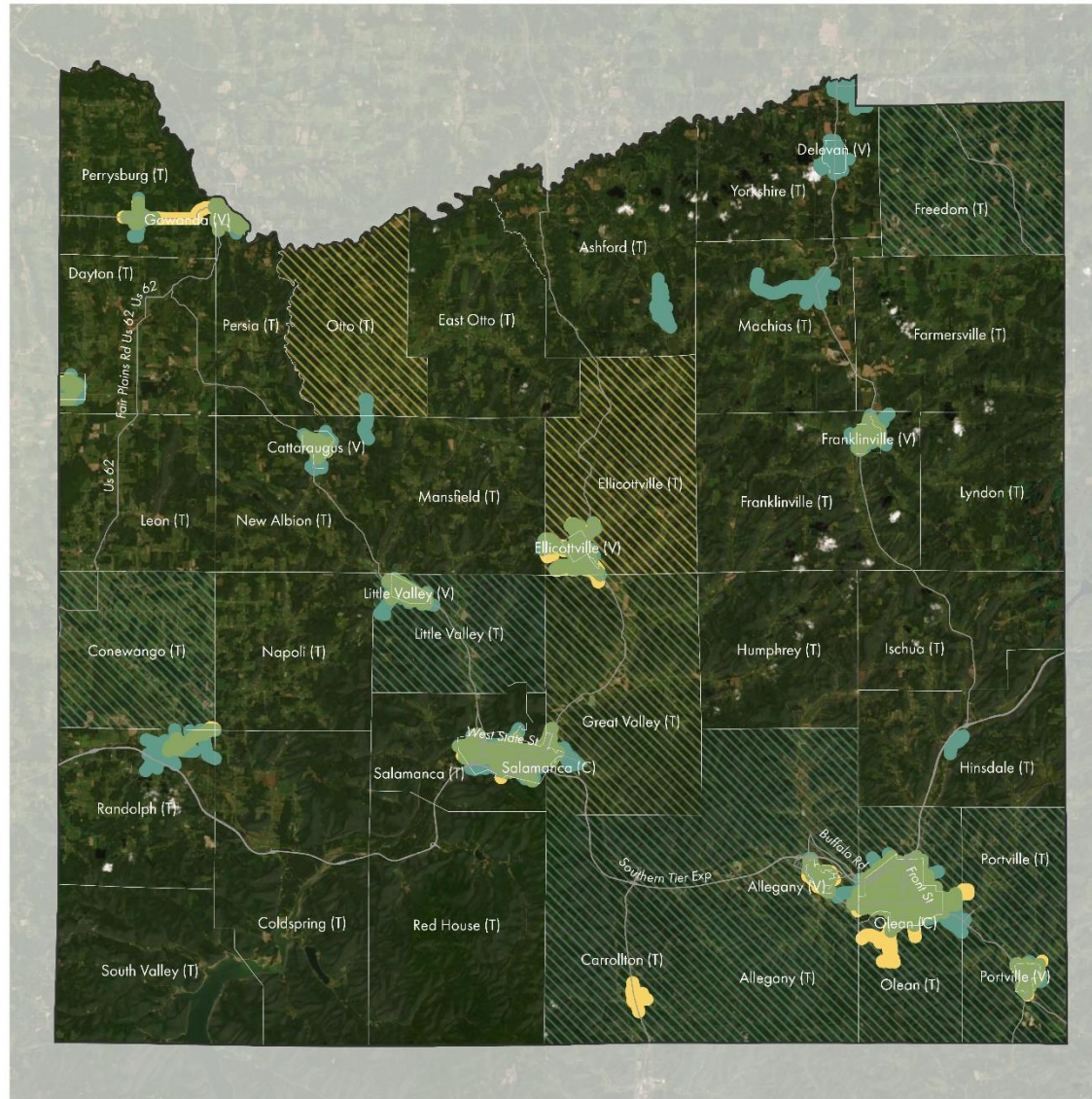
Note: Cattaraugus County is designated as a HUD Opportunity Zone at the County-level.

Data Sources

NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries
 US Census Bureau (2020), tl_2020_36_tract



County-Wide Maps



WATER & SEWER INFRASTRUCTURE Cattaraugus County

- County Boundary
- Municipal Boundary
- Arterial Road
- Water & Sewer
- Water Only
- Sewer Only

Note: Boundaries represent 1/4 mile buffers around known water and sewer lines.

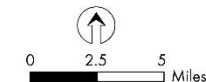
Towns for Which Locational Line Data Is Not Available

- Water & Sewer
- Water Only
- Sewer Only

Data Sources

NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries Southern Tier West RPDB (n.d.), CattoUtility

Note: References for all water and sewer GIS data available upon request.



County-Wide Maps



FLOODPLAINS Cattaraugus County

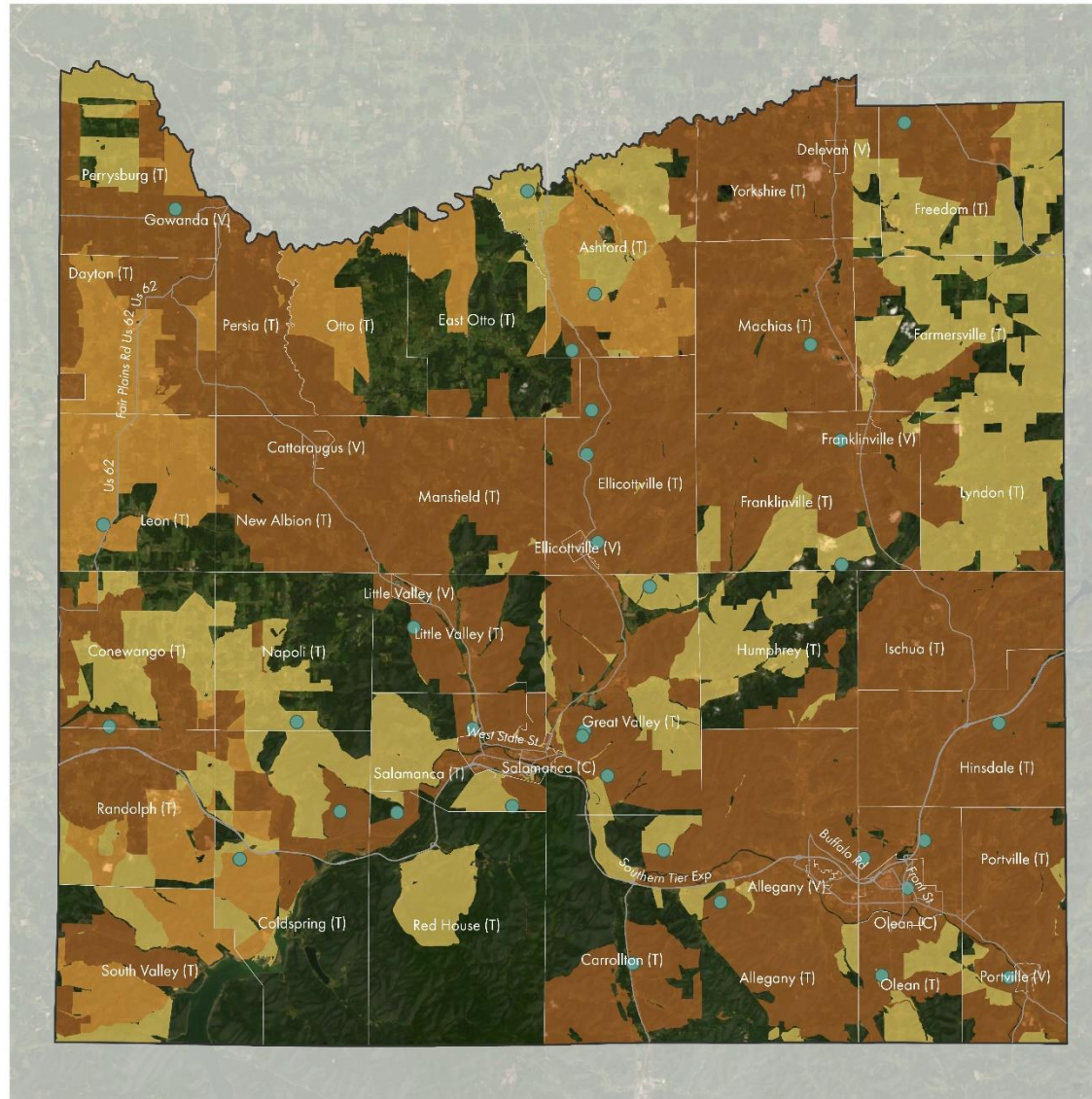
DRAFT: December 21, 2021

- County Boundary
- Municipal Boundary
- Arterial Road
- 100-Year Floodplain
- 500-Year Floodplain
- Undescribed/No Data

Data Sources
 FEMA (1996), Q3 Flood Data
 NYS DOT (2020), NYS Roadway Inventory System
 NYS GPO (2021), NYS Civil Boundaries



County-Wide Maps

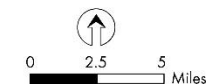


BROADBAND AVAILABILITY Cattaraugus County

- County Boundary
- Municipal Boundary
- Arterial Road
- 100 Mbps and Above
- 25-99 Mbps
- 24 Mbps and Below
- Cell Tower

Note: Data excludes satellite service.

Data Sources
 Cattaraugus County (2007), Cell_Tower
 Federal Communications Commission (2020),
 NY - Fixed - Jun 19v1
 NYS DOT (2020), NYS Roadway Inventory
 System
 NYS GPO (2021), NYS Civil Boundaries
 US Census Bureau (2020),
 il_2020_36_tabbblock10





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